

# Fitness industry: state and prospects of development in the countries of the world

Liubov Chekhovska

Lviv State University of Physical Culture, Lviv, Ukraine

*Fitness industry is a sphere of successful and promising business in many countries around the world. That is why it is necessary and relevant to study the prospects for the development of the international fitness industry.*

**Purpose:** to study the state of functioning and prospects for the development of the fitness industry in the world.

**Material & Methods:** theoretical analysis and generalization of scientific literature, sources and information of the world internet, documentary method, system analysis method, comparison and compare method.

**Results:** the article presents an analysis of the fitness market in different countries in the world. The volume of the market is determined by the number of fitness clubs, the number of clients and profitability. Examines the key trends in the industry of sports services, its economic performance. The top 20 most popular fitness networks of the world are determined. Describes the fitness industry in the US and Russia.

**Conclusion:** fitness industry in various countries of the world develops and strengthens positions on the world arena, during 2012–2016. concluded the most successful transactions. The total revenue of the fitness industry in 2015 was 81 billion dollars. In 2016, most European operators of fitness clubs expected financial growth.

**Keywords:** fitness industry, fitness clubs, revenue, profit.

## Introduction

Today, the worldwide trend is the interest in a healthy lifestyle. That's why fitness is becoming more popular all over the world. At present, the fitness industry is a sphere of successful and promising business, after all, in terms of growth rates it is the second largest in the world after high technologies [14; 15]. Due to the consistently high rates of development, the fitness industry has a high investment attractiveness, the market volume of which is increasing every year.

Market transformations, the commercialization of the infrastructure of mass sports in the world receives new development impulses and often has not only positive but also negative consequences.

Fitness acquired (A. I. Shamardin, 2005; A. A. Krasnova, 2005; Y. Belyak, 2015). In many countries, the reduction in health care costs and the solution of demographic problems is associated with movement activity in the mass sport system [15].

Questions related to the study of fitness, formed as a scientific problem relatively recently. Issues that reveal the problems of restoring the mental, spiritual and physical strength of a person (H. J. Gibson, J. F. Singleton, 2011; J. B. Bączek, 2011); physical training of those engaged in fitness (Z. E. Firileva, 2009), theoretical and methodical aspects of fitness (E. G. Saykina, 2008; V. I. Grigoriev, 2009, Y. Belyak, 2014) improving the management system of sports services structures (V. P. Mironenko, 2009); assortment policy in the field of sports and health services (E. S. Kabanovskaya, 2005); organizational and pedagogical factors of management of the

sphere of fitness services (S. I. Smirnov, 2013); theoretical and methodological foundations of recreational activities of various groups of the population (A. V. Andreeva, 2014) development of marketing (M. Vasilenko, N. Karpenko, S. Kovalchuk, J. Levinson, E. Romat, J. Trout, etc.) and others.

## The relationship of research with scientific programs, plans, themes

The work is carried out in accordance with the scientific theme of the Department of Fitness and Recreation LSUPC "Technology of attracting the population to improving physical activity" (Protocol No. 8 of 19.04.2016 Academic Council meeting LSUPK, state registration number 0117U003040).

## The purpose of the research

To study the state of functioning and prospects for the development of the fitness industry in the world.

## Material and Methods of the research

**Research methods:** theoretical analysis and generalization of scientific literature, sources and information of the world Internet, documentary method, system analysis method, comparison and contrast method.

## Results of the research and their discussion

The international fitness industry is increasingly developing and strengthening in the world arena. It was the most stable during 2012–2016. Compared with other industries. For the

purpose of the study, we analyzed the accounting documents for 2014–2016. European Association of Physical Activity (Europe Active Association) and the International Association of Sports Clubs (IHRSA) [12; 14]. They combine fitness, wellness clubs in Europe and the world respectively, the most authoritative in the fitness industry, so the reliability of these reports is not in doubt.

It is established that it was in the fitness industry that the most successful deals were concluded in the last few years. So, in 2013, the global fitness industry as a whole was about 75,5 billion dollars in profits, totaled 150,000 fitness clubs, in which about 132 million people were trained [14]. Quantita-

of 14,6 million customers. Australia and New Zealand numbered about 3,000 clubs, together with 2,3 million customers, both markets had profits of about 2,1 billion dollars [14].

According to the report on the Australian market in 2013, revenues amounted to more than 1,8 billion dollars, moreover, 1,4 billion dollars in the structure of the country's gross domestic product (GDP) belongs to the fitness industry.

According to the EuropeActive report for 2015 [7; 11] established the largest leaders of the European market of fitness services in 2014 for profitability in the UK (5,6 billion euros) and Germany (4,8 billion euros) (Fig. 1).

In our opinion, this is due primarily to the high standard of living in these countries. It should also be noted that in the aggregate the share of the first 5 countries (UK, Germany, France, Italy and Spain) accounted for 64% of the total Euro-

**Table 1**  
Characteristics of the fitness markets of different countries (by IHRSA, 2014)

Market	Income (\$)	Number of clubs	Number of members
USA	21 828 000 000	30 500	50 249 000
UK	6 235 173 800	5 900	7 600 000
Germany	5 348 110 500	7 566	7 890 000
Italy	4 251 494 521	6 000	4 160 000
Spain	4 110 859 842	4 640	6 384 000
Russia	1 622 707 832	3 300	1 700 000

tive characteristics of the markets of the fitness industry of the largest countries are presented in the table 1.

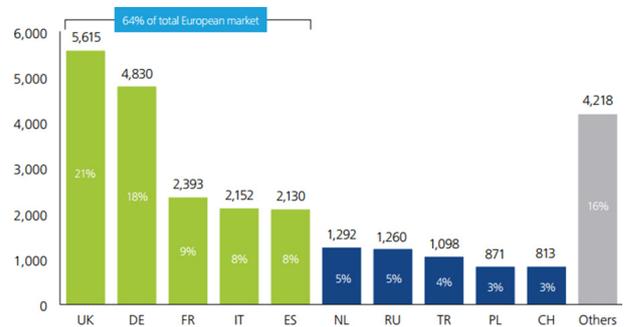
So, America's fitness industry increased its profits to 21,8 billion dollars, having 30,500 clubs, which were visited by more than 50 million customers. Income in 2013 in the US grew by 8,1% compared with 2012. And the number of customers increased by 6.7%. Sales of additional services increased by 2,5% [14].

As for Europe, its fitness industry received profits of about 32 billion dollars in 2013, having 45,000 clubs with 41,9 million customers. So, in the UK and Germany, growth and stabilization of the fitness market took place. In the UK, the number of clubs has increased to 5900, with more than 7 million customers (see table 1). In this country there is a tendency to strengthen the position of the network of fitness clubs "low cost". In Germany, there were almost 7.9 million customers in more than 7,000 clubs (see table 1). The results of the analysis show that Spain, Italy and Portugal "experienced" the crisis, as they revealed a 20% decrease in the number of fitness clubs and the number of clients in accordance. Although, in our opinion, the financial performance of Italy and Spain is not critical, as the countries were able to profit in the fitness industry 4,25 billion and 4,21 billion dollars, respectively. In Greece and Ireland - the fitness market has decreased by 10% [14].

IHRSA reporting documents show the growth of the fitness industry in 15 countries in Latin America.

This is confirmed by the fact that the revenues of their fitness industry markets amounted to about 5.5 billion dollars in 2013, with 46,000 clubs. One of the leaders is Brazil – 2.4% billion in revenue, 23,398 clubs, 7 million customers. Mexico and Argentina took the second and third places respectively.

The profits of Asian countries in the fitness industry in 2013 amounted to about 11,5 billion dollars, with 18,000 clubs out

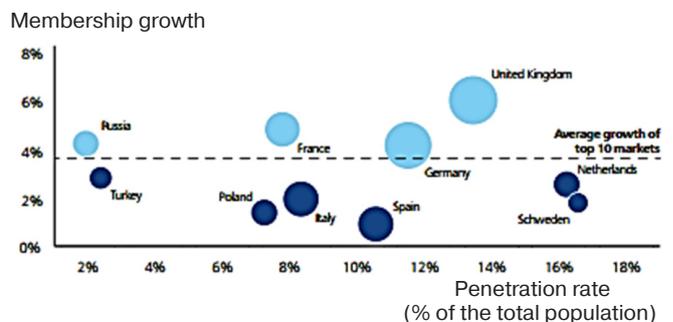


**Fig. 1. Top-10 European fitness markets (million EUR, 2015) [11; 12]**

pean fitness market (see Fig. 1).

It should be noted that in 2014 Germany was the largest fitness market in Europe, with 9,5 million consumers (the leading position belongs to the German network "McFIT" – 1,3 million customers), then – Great Britain (8,8 million customers), France (5,2 million), Italy (5,1 million) and Spain (4,9 million). The most popular fitness networks in the world are presented in table 2 [7].

Analysis of the reporting documents allowed to establish that the markets of Eastern Europe: Russia, Turkey and Poland were among the ten most promising objects of the fitness industry. It is worth noting that they have a favorable growth potential of the number of clients of fitness clubs than the mature markets of Western Europe. Also Turkey and Russia have



**Fig. 2. The level of penetration and increase in the membership of the top 10 European fitness markets: the total number of members (bubble size)**

**Table 2**

**Top 20 most popular fitness networks in the world**

Rank	Operator	Number of customers
1	McFIT	1204000
2	HealthCity/Basic-Fit	780000
3	Virgin Active	598000
4	Health&Fitness Nordic	565000
5	Fitness First	454000
6	David Loyd Leisure	450000
7	Fitness World	400000
8	Sport City/Fit For Free	350000
9	Pure Gym	300000
10	Nuffield Health	297000
11	Alex Fitness	290000
12	Kieser Training	269000
13	DW Sports	265000
14	Clever Fit	252000
15	Curves	242000
16	INJOY	239000
17	The Gym Group	225000
18	Holmes Plase Group	211000
19	Mrs.Sporty	209000
20	ACTIC	205000

a significant potential fitness market with a penetration rate of 2.4% and 1.9% respectively (Fig. 2).

As you can see, among 10 countries Sweden and the Netherlands are the most mature fitness markets with a penetration rate of 16,7% and 16,4% respectively [11].

According to the results of the analysis of the IHRSA report for 2016, the total world income of the fitness industry in 2015 was already 81 billion dollars, 187,000 clubs operated, which were visited by 151 million customers. In figure 3 represents countries that account for 71% of the total revenue of the fit-

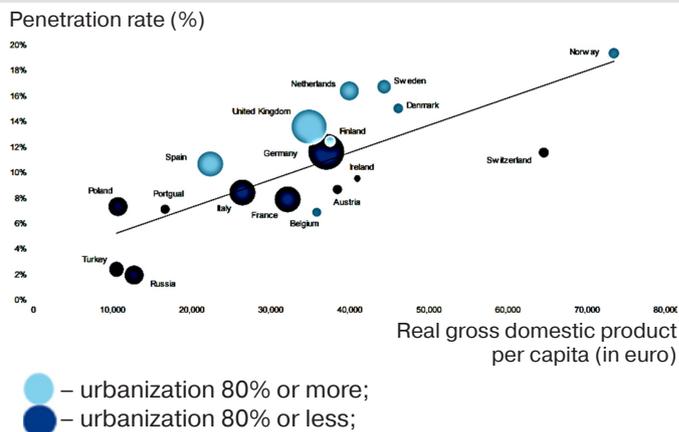
United States	\$25,800,000,000
United Kingdom	\$6,228,000,000
Germany	\$5,357,000,000
Japan	\$5,158,000,000
France	\$2,654,000,000
Canada	\$2,561,000,000
Australia	\$2,555,000,000
Brazil	\$2,442,000,000
Italy	\$2,386,000,000
Spain	\$2,363,000,000

**Fig. 3. Top-10 countries, accounting for 71% of total industry revenue (according to the report IHRSA, 2016) [14]**

ness industry.

The real gross domestic product (GDP) per capita and the degree of urbanization explains the penetration of the fitness market in 2015. The ratio of the indices of these factors is shown in figure 4.

Also in figure 5 shows the countries in which the largest number of fitness clubs are concentrated (million).



**Fig. 4. The ratio of real gross domestic product (GDP) per capita and the level of urbanization [12]: the total number of members (bubble size)**

United States	36,180
Brazil	31,809
Germany	8,332
Argentina	7,900
Mexico	7,826
Italy	7,300
South Korea	6,839
United Kingdom	6,312
Canada	6,156
Japan	5,979

**Fig. 5. Top-10 countries, accounting for 67% of the world's number of fitness clubs (according to the report IHRSA, 2016) [14]**

So, the leader in this indicator is the United States. A more detailed analysis of the information reveals the dynamics of

**Table 3**

**The volume of the US fitness market (according to the report IHRSA, 2016) [11]**

Year	Revenue (\$, billions)	Number of clubs (million)	Number of members (millions)
2014	24,2	34,460	54,1
2015	25,8	36,180	55,3

growth and profitability of the fitness industry in this country (tab. 3).

In our opinion, such growth is connected both with the popularization and development of sports in educational institutions (schools, colleges, universities), and with the development of recreational and amateur sports.

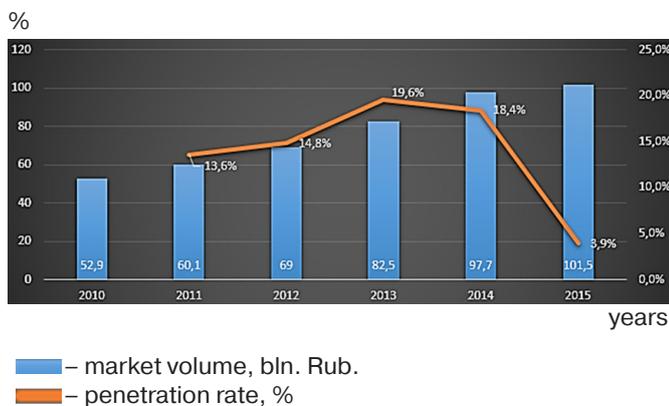
Analysis of the reporting documents also allowed the establishment of 5 US states with the largest number of clubs. These include: California, Texas, Florida, New York, Pennsylvania. In states where there are a large number of clients of fitness clubs, include: Massachusetts, Colorado, New Jersey, Illinois, California. The most popular networks in the US: LA

Fitness, Life Time Fitness, Planet Fitness and CrossFit, and fitness clubs: «Equinox», «24 Hour Fitness», «Curves», «The Sports Club/LA», «Crunch», «Gold's Gym», «YMCA», «David Barton Gym», «Anytime Fitness».

In most eastern countries, fitness is in its infancy, which is due to national and cultural traditions. However, the popularity of fitness clubs is growing. So, the studies conducted in fitness clubs located in expensive hotels in the United Arab Emirates, showed that the number of Arab clients is up to 50%. The purpose of their visit is to promote health and reduce stress [13].

In China, despite the high sports activity, the popularity of fitness clubs is low, since 55% of consumers prefer state sports societies, 40% – state sports clubs in the community, and only 5% – to private clubs [2].

Analyzing the fitness industry in Russia, we note that to date it is in the formative stage and lags behind the western for

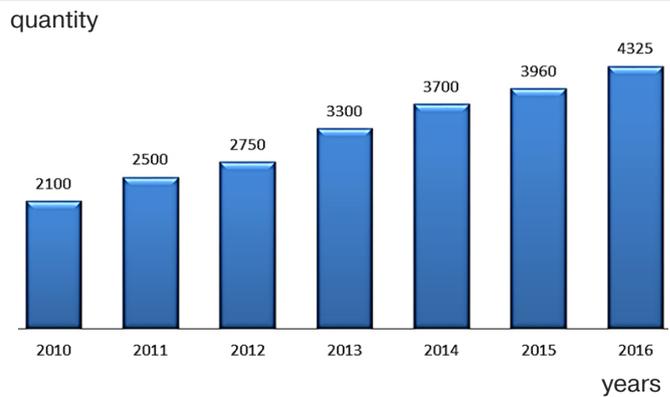


**Fig. 6. Dynamics of indicators of the market of fitness services in Russia**

20–30 years [3; 4]. Although the pace of its development has decreased, but the positive dynamics persisted (Fig. 6). So, in 2015 in Russia nominal growth of the market made 14,1%, real – 3,9%. The volume of the market of fitness services along with the attendant (Crossfit, personal trainings, etc.) amounted to at least 101,5 billion rubles. [1; 8]. According to the estimation of the international sports organization IHRSA, in mid-2013 there were more than 3000 fitness clubs in Russia, with more than 1,7 million clients. However, the number of those who are engaged in fitness is about 2%. By placing the objects of the fitness industry, it is uneven, the leaders are Moscow and St. Petersburg [9]. Although in general there has been a positive trend in increasing the number of fitness clubs in Russia (Fig. 7).

In our opinion, several factors contribute to the growth rates:

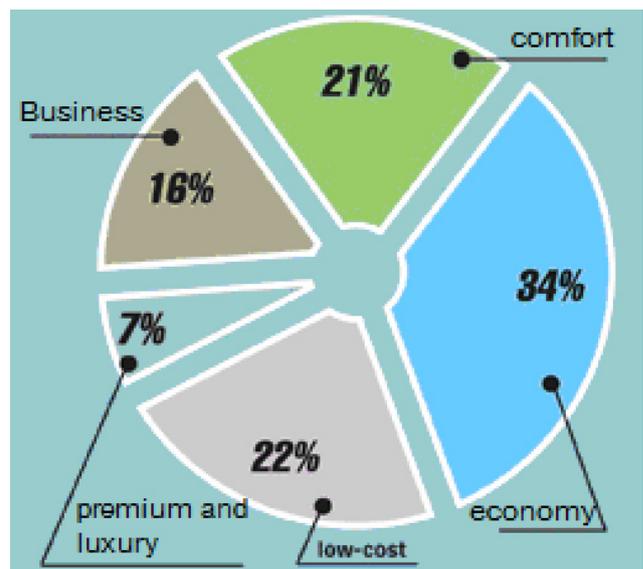
- relatively weak initial state of penetration of fitness services into the domestic market (only 3% of the population of Russia and 12,5% of Moscow residents are engaged in fitness);
- weak development (passivity) of fitness services outside of Moscow and St. Petersburg, with a high potential for their development in the regions;
- growing popularity of fitness as a worldwide trend;



**Fig. 7. The number of fitness clubs in Russia in 2010–2016 years**

– state policy in the field of sports, contributes to an increase in the number of people who are engaged in sports, including - in fitness clubs in particular.

Consequently, the volume of the Russian fitness market was about 1% of the global market and exceeded 1 billion dollars. Basically, as already noted, it is concentrated in large cities



**Fig. 8. Structure of the market of fitness services in Moscow and the Moscow region (% of market turnover)**

(Moscow, St. Petersburg, etc.) (Fig. 8), and in the regions the niche of fitness services is practically not occupied. If in the market of fitness services in Moscow large clubs tend to develop on their own, then in the regions mainly operate franchise clubs. The percentage of clubs that are franchised by network operators in the regions is more than 25%. The largest revenue network fitness clubs in Russia – World Class, which is also actively developing franchising: currently, half of the 72 clubs in the network are open for franchise.

The largest fitness companies in Russia are: the «Russian Fitness Group» (World Class and «Fizkult» brands) – 80 clubs, Alex Fitness – 60, Fitness House – 49, X-Fit – 33, Zebra – 30

Strata Partners ( CityFitness and Orange Fitness brands) – 27, “Planet Fitness” – 22 clubs. The above listed networks unite about 300 clubs. At the same time, more than 500 clubs can be called full-fledged fitness centers, while the other 2800 are ordinary gyms.

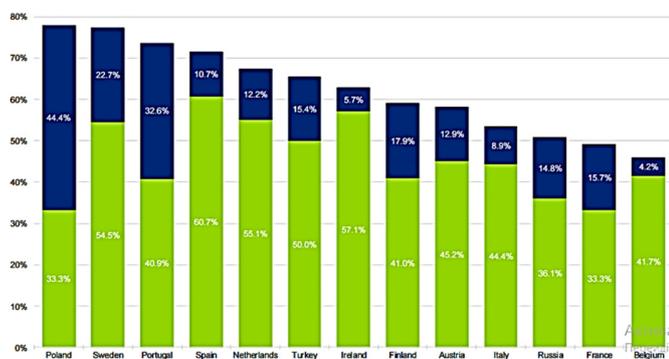
**Table 4**  
Average annual cost for visiting the fitness club (2015 p.)

Country	Average annual cost of visiting, \$
Japan	400–500
Italy	350–450
Russia	1600

It is interesting to note that the cost of visiting fitness clubs in Russia was significantly higher than in Europe (tab. 4) [5]. However, the main income in the developed fitness markets was due to turnover of visitors, while in Russia – at the expense of the cost of subscription [6; 9; 10].

Prospects for further development of the Russian fitness services market look favorable: even in the current economic situation, the market will continue its growth in the next 4–5 years, and if it improves – it will increase the growth rates of indicators close to 22–25% in nominal terms. With the further development of the Russian market for world trends, the number of network fitness clubs in the Russian regions will continue to increase in the coming years.

Most European operators of fitness clubs expected revenue growth in 2016. As the data (Fig. 9) show, Poland in this sense



Remark: ■ increase 2,5-7,5% ; ■ increase >7,5%

**Fig. 9. The expected increase in the income of the fitness industry of countries in the 2016 (in %) [12]**

was considered as the most “optimistic” country. Information on the real state of functioning of the fitness industry in 2016 will be presented in subsequent publications.

It should also be noted that the fitness industry is actively attracting to its activities other industries: medicine, IT technology, etc., which allows to further strengthen its position in the market of fitness services.

## Conclusions

1. A characteristic for the fitness industry of different countries of the world is the development and strengthening of positions in the world arena, the greatest stability during 2012–2016, Conclusion and implementation in the mentioned period of the most successful transactions.

2. In 2013, the global fitness industry had a profit of about 75,5 billion dollars, in particular, Europe – about 32 billion dollars. There is an increase in the fitness industry in Latin America. Total revenue fitness industry in 2015 amounted to 81 billion dollars.

3. Economic problems hamper the development of the fitness industry in some countries of Europe, North and South America. Development prospects remain in emerging markets in the Asia-Pacific region, the Middle East and Latin America.

4. It was found the largest European market leaders of fitness services in 2014. These include the United Kingdom and Germany. Markets of Eastern European countries, such as Russia, Turkey and Poland, entered the top ten subjects of the fitness industry.

5. The Russian market of fitness services is quite young, so the degree of its saturation (penetration) is very low compared to other countries. The Russian market of fitness services is diverse in its segmental and regional aspects. The dynamics of the number of fitness clubs in Russia has been revealed. In the capital and large cities, a sufficient number of clubs in the premium segment, while in small cities, the fitness industry practically does not develop. The subsequent reserve of growth of the Russian market of fitness services can be based on development of an average price segment. Prospects for further development of the Russian fitness services market look favorable.

6. In 2016, most European operators of fitness clubs expected financial growth.

**Prospects for further research** will be directed to the study of the current state and functioning of the fitness industry in Ukraine

**Conflict of interests.** The authors declare that no conflict of interest.

**Financing sources.** This article didn't get the financial support from the state, public or commercial organization.

## References

1. Borovikov, M. (2016), “The market of fitness services in 2016 in Russia: growth in spite of the crisis”, available at : <http://www.buybrand.ru/market-reviews/11989/> (accessed 03.04.2017) (in Russ.)
2. Vin Yuy Lan (2010), “The attitude of the people of Hebei Province (China) to the physical culture and health activities”, available at: <http://lib.sportedu.ru/Press/FVS/2010N2/p28-30htm> (in Russ.)

3. Grigorev, V. I. (2008) "Methodological aspects of technological development of the fitness industry", *Sbor. mater. Vseros. nauchno-prak. konf. "Fitness in the innovation processes of modern physical culture"*, SPb., pp. 17–24. (in Russ.).
4. Yefremova, M. V., Chkalova, O. V. & Boshman, T. K. (2015), "Analiz rossiyskogo rynka fitnes-uslug", *Ekonomicheskij analiz: teoriya i praktika*, No 21 420), pp. 25–37. (in Russ.)
5. "Features of the fitness industry in Russia", available at: [http://studbooks.net/811525/marketing/osobennosti\\_fitnes\\_industrii\\_rossii](http://studbooks.net/811525/marketing/osobennosti_fitnes_industrii_rossii) (accessed 03.04.2017).
6. "Press center of BeBoss.ru", available at: <http://www.beboss.ru/franchise/articles/2503> (accessed 01.04.2017).
7. "Press center of BeBoss.ru", available at: [https://www2.deloitte.com/content/dam/Deloitte/de/Documents/consumer-business/SB-EuropeActive%20and%20Deloitte.%20European%20Health%20and%20Fitness%20Market%202016\\_DE.pdf](https://www2.deloitte.com/content/dam/Deloitte/de/Documents/consumer-business/SB-EuropeActive%20and%20Deloitte.%20European%20Health%20and%20Fitness%20Market%202016_DE.pdf) (accessed 03.04.2017).
8. Filippova, S. O. (2008), Fitness, fitness technology and fitness industry *sbor. mater. Vseros. nauchno-prak. konf. "Fitness in the innovation processes of modern physical culture"*, SPb., pp. 3–25. (in Russ.)
9. "Fitness", available at: <http://fitness-pro.ru/news-fitnes/rynok-fitnes-uslug-v-rossii-rost-vopreki-krizisu/> (accessed 01.04.2017).
10. "Fitness", available at: <https://vc.ru/n/fitness-rbc-2015> (accessed 01.04.2017).
11. "EuropeActive", available at: <https://europeactive.blackboxpublishers.com/en> (accessed 01.04.2017).
12. Hollasch, K. (2016), "The European Health & Fitness Market Report 2016", available at: [http://www.europeactive.eu/sites/europeactive.eu/files/events/EHFF2016/KarstenHollasch\\_EHFF2016.pdf/](http://www.europeactive.eu/sites/europeactive.eu/files/events/EHFF2016/KarstenHollasch_EHFF2016.pdf/) (accessed 01.04.2017).
13. McKechnie, D. S., Grant, J., Golowala, F. S. & Ganesh, P. (2006), "The Fitness Trend Moves East: Emerging Market Demand in the UAE", *European Sport Management Quarterly*, No 6, pp. 289–305.
14. "The IHRSA Global Report 2016", available at: [http://download.ihrsa.org/pubs/2016\\_IHRSA\\_Global\\_Report\\_Preview.pdf](http://download.ihrsa.org/pubs/2016_IHRSA_Global_Report_Preview.pdf) (accessed 03.04.2017).
15. "What we do", *UK Sport – The UK's High Performance Sports Agency*, available at: <http://www.uk sport.gov.uk/pages/what-wedo> (accessed 01.04.2017).

Received: 09.03.2017.

Published: 30.04.2017.

## Information about the Authors

---

**Liubov Chekhovska:** *PhD (Physical Education and Sport), Associate Professor; Lviv State University of Physical Culture, 11, Kostushko str., 79000, Lviv, Ukraine.*

**ORCID.ORG/0000-0003-3833-5212**

**E-mail:** [Lyubahock@gmail.com](mailto:Lyubahock@gmail.com)