

# Analysis of the market of physical culture and health services in Lviv

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*Today, fitness services are in demand among the Ukrainian population. The saturation of the market for fitness clubs in large and small cities is different.*

**Purpose:** *to study the market of physical culture and health services in Lviv.*

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

**Results:** *in the article the analysis of the market of the establishments that provide physical culture and health services in Lviv is presented. Fitness club "FitCurves" provides services only to women, but the fitness club "Olympus" is the only one that offers Crossfit services. "Clubs Malibu", "Kiwi fitness" have schools for the training of group coaches. Social responsibility is one of the most important principles of the network "Sport Life".*

**Conclusion:** *conditions for ensuring the content and active leisure of the population of Lviv are provided: 78 fitness clubs, 16 swimming pools, 64 sports clubs, 6 tennis courts, 10 stadiums, etc. All establishments offer a wide range of fitness services. Price policy of season tickets for fitness clubs is different.*

**Keywords:** *market of fitness and health services, fitness services, fitness club.*

## Introduction

Recently, there has been a positive tendency in Ukraine for the growth of the number of people engaged in various types of recreational motor activity [1; 2; 6]. Clients of fitness clubs are 1,02 million Ukrainians, which is 2,4% of the population of our state [1]. That is why, in our opinion, it is necessary to preserve the existing and to form a modern infrastructure of sports facilities at the place of residence, study, work, in places of mass recreation of citizens, etc. Creation of conditions for the population for doing recreational motor activity is one of the important tasks of state policy in the field of physical culture and sports [6]. The presence of sports infrastructure – institutions of physical culture and sports will help meet the needs of the population for daily physical activity and increase those that have a high level of recreational motor activity [6]. Today, fitness services are in demand among the population of Ukraine [7]. After all, appearance and well-being are integral signs of the success of any person, which encourages you to find time for fitness. Compared with the turnover of the industry, fitness services occupy a small place. But, if you compare incomes only to the market of services, then this is a significant proportion. Today, fitness clubs offer a fairly wide range of services and the number of clubs is growing. Therefore, the questions of studying the market of physical culture and health services rendered by specialized institutions, and their characteristics remain relevant.

Modern society is increasingly becoming a service society. One of the most promising branches in the sphere of services can now be considered physical culture and sports. It is her various institutions that ensure the development of mass sports (sports for all) in Ukraine. According to the Law of Ukraine "On Physical Culture and Sport", the institution of

physical culture and sport is a legal entity that ensures the development of physical culture and sports by providing sports and fitness services [8]. Relationships with the State Social Standard in the field of physical culture and sports (2013) are provided by children's and youth sports schools, health centers, physical culture and sports centers for disabled people, sports clubs, sports and health facilities [5]. The standard establishes requirements for indicators of the necessary provision of the needs of the population in conditions for exercising physical culture and sports and obtaining physical culture and sports services. In general, the network of sports, health and sports facilities in Ukraine is characterized by a lack of quantity and uneven location throughout the country [9].

It has been established that the level of provision of the population with the most mass sports and sports facilities is: flat structures – about 70%, swimming pools – 20%, sports halls – 40% [3]. Unfortunately, Ukraine is inferior to sports clubs in leading countries 2–3 times, swimming pools – 30 times. The availability of pool areas in Ukraine is only 14% of the normative [1]. 80% of sports facilities do not meet the standards of this [3].

**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 LSUPK "Technology of attracting the population to improving physical activity" (Minutes No. 8 of the meeting of the Academic Council of LSUPK of April 19, 2016 state registration № 0117U 003040).

**The purpose of the research:** *to study the market of physical culture and health services in Lviv.*

## Material and Methods of the research

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

## Results of the research and their discussion

Sport and health services are provided both by state non-commercial (sports schools, swimming pools, etc.), and by commercial structures (fitness centers and fitness clubs). The main purpose of the latter is to generate income.

According to the regional department of statistics, the population of the Lviv region as of 1.03.2017 was 2532,2 thousand people, including the population of the regional center – 757,8 thousand people. Lviv region has 25 united territorial communities. The area of the city of Lviv is 182 kml, the area is 21833 kml, the population density is 3950,2 people/km<sup>2</sup>.

The institutions of physical culture and sports in the city of Lviv serve both to promote health, develop and improve physical qualities, and to conduct meaningful leisure activities for various sections of the population. In total 56 stadiums are located in the region (they are not only in Brodovsky and Peremyshlyansky districts), 2009 sports grounds, 768 sports halls, positive dynamics of the number of football fields (729 – in 2000, 859 – in 2012). Greatest asymmetry is peculiar to the location of 39 swimming pools, of which the thirteenth of Lviv, and in 11 districts of the region there are none at all. More sports facilities are functioning in Lviv – 1170 and in Zhydachiv and Sokal regions, where 349 and 328 sports facilities are registered in accordance with.

State of the sports infrastructure of Lviv is presented in Table 1.

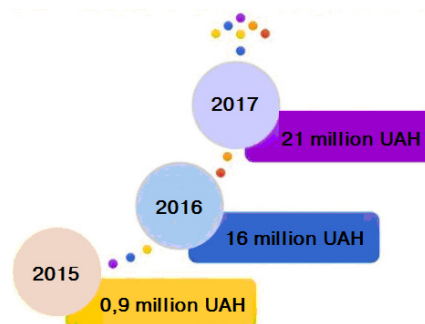
**Table 1**  
**Characteristics of the sports infrastructure of Lviv**

Objects	Number
Sports clubs	64
Fitness clubs	78
Dance Clubs	45
Stadiums	10
Tennis courts	6
Pools (open / closed)	3/13

For the implementation of paragraph 2.3.2. "Formation of a healthy lifestyle and development of the health sector," strategic objective 5.2 "Quality of life" of the Strategy for the development of Lviv region for the period to 2020, and in accordance with the Decree of the President of Ukraine "On the National Strategy for improving motor activity in Ukraine for the period until 2025 "Motor activity – a healthy lifestyle – a healthy nation", decree of the Cabinet of Ministers of Ukraine No. 653-r of September 8, 2016 "On approval of the plan of measures for 2017 for the implementation of the National Strategy for Healthy Motor Activity with a view to overcoming the inconsistency with modern requirements for equipping sports grounds for all strata of the population at the place of residence and in places of mass recreation , in particular, in

the countryside, the Lviv Regional Council approved the regional program "Sports Ground" for 2017-2021 (Decision No. 351 of 31.01.2017). It is allocated 21 million UAH (Figure 1).

### Regional target program "sports ground"



**Fig. 1. Expenditures for arrangement of sports grounds in Lviv**

Of these, 16 million UAH - for the construction of 24 sites with artificial surface, 65 of the training equipment, three planned replacement of coverage, and 5 million UAH is provided for co-financing from the State Regional Development Fund to establish 10 universal sports grounds, the list of which will be determined later.

The Cabinet of Ministers approved (09.2017) the procedure for sending funds (270 million UAH), provided for in the state budget for the construction of soccer fields with artificial cover in various regions of Ukraine.

Analyzing the market of sports and health services, it should be noted that the fitness industry dominates. The reason for this is the world fashion for a healthy lifestyle. The market of fitness services in Ukraine is actively growing. According to the research conducted by the FitnessConnectUA project team, the annual turnover of this market in Ukraine today is \$ 201.8 million [1], and Smart marketing agency notes that about 19.7 billion UAH Ukrainians spend the year "on classes for their body" [7]. Despite the military actions and the economic crisis, fitness clubs, fitness centers, etc. are opening in Ukrainian cities more and more. This is explained by the fact that this service market is very promising, with a potential capacity of about \$ 2 billion. It is predicted that in 5-6 years, with a favorable macroenvironment, the market will be able to reach this index [4; 7; 10]. 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.

Research identified Ukraine's potential place in European rankings. So, our state is among the twenty European countries both in terms of the number of fitness clubs and in the number of their visitors [1]. Today, the market of fitness services in Ukraine includes network centers and individual non-network establishments. So, fitness clubs are located in shopping centers, business centers, hotels, sports complexes, etc. The analysis of the market, found that in Ukraine there are 1419 fitness clubs (Figure 2).

As shown in Figure 1, the saturation of the market by fitness clubs in cities and towns is different. This is mainly due to the purchasing power of the population. Since Lviv occupies the 5th place with 9 seats (5%) among 24 cities in the country, it



**Fig. 2. Number of fitness clubs in the cities of Ukraine [1]**

can be considered an average city. Therefore, we have studied in more detail the state of the fitness industry in Lviv.

So, consumers of fitness services in the city have 51576 people (about 6,8%) [1]. Analyzing the activities of fitness facilities, it should be noted the presence of two international networks: "FitCurves" (distributed in 80 countries) and "Sport Life" (founded by venture capital fund Kiev-Capital in Maryland, USA). The largest in terms of the number of clubs is the "FitCurves" network – 8 clubs (from 153 clubs in Ukraine) – fitness clubs for women, then "Sport Life" – 4 clubs (from 55 clubs), "Kiwi fitness" – 4 (out of 5 clubs), "Olympus" – 4, "Malibu" – 2 (out of 38 clubs) "Forever" – 2, "League" – 2, etc. (Table 2).

**Table 2**  
**Classification of fitness centers in Lviv**

Network Type	Network description	Fitness clubs
International	Works in the market of several countries	"Sport Life" "FitCurves"
Ukrainian	Operates in the state market	"Olympus" "Malibu" "Kiwi Fitness"
Regional (local)	Working in the market of one region (city)	"Forever" "Sante" "League" "Beauty Formula" "Positive" "Unity" Other

In Lviv, there are more than 70 organizations that provide various fitness services. Only 7,7% of them have more than one branch in the city. Another part of the institutions, has one office, is the bulk of the Lviv fitness industry. First of all, these clubs are oriented towards people with lower income.

We analyzed the official sites of the most popular fitness networks in Lviv, which have more than one club. The sites provide general information on the activities of the fitness club and its mission; coaches, leading personal and group classes; stock and news, schedule and prices. This made it possible to generate information on their general characteristics (Table 3).

These tables indicate the availability of a wide range of fitness services in all clubs. It should be noted the popularity of the classes they offer, for example, Pilates, yoga, TRX, 90-60-90, etc. Only two fitness clubs (Forever and Kiwi Fitness) offer jumping classes, and three clubs ("Malibu", "Sport Life" and "Forever") – a lesson for children. Unfortunately, only the fitness club "Sport Life" has a swimming pool and offer appropriate services. The fitness club FitCurves is also specific, as it provides services only to women. Fitness Club "Olympus" – the only one, offers services for licensed Crossfit. Most clubs provide related services to restore the body (sauna, massage, etc.).

The analysis of sites of fitness establishments revealed some peculiarities of the content of the presented information. So, the Fitness club "League" on its website gives additional information: rules of conduct, rights, duties, prohibitions. Fitness club "Malibu" informs about a single membership card, which makes it possible to visit relevant clubs in 7 cities of Ukraine. The club also informs about the provision of training services for trainers in its school. Fitness club "Kiwi fitness" has a similar school for the training of group trainers and is the training center "Jumping" for coaches of Ukraine under the licensed program. On the site of the club you can get acquainted with useful scientific information on nutrition, caloric content of products, benefits from motor activity, etc.

It should be noted that social responsibility is one of the most important principles of the network of fitness clubs "Sport Life", as network owners understand the primary role of patronage and sponsorship for the development of sports and provide material support to sports teams of various levels – from domestic to national teams. Support for the development of children's sports, professional sports teams, national federations and the national Olympic movement, physical and health work with the company's employees, development of mass sports is one of the key directions of the social policy of the Sport Life group of companies for many years.

The pricing policy that fitness clubs adhere to is different, which determines the cost of subscriptions. The study [1] found that 31% of respondents among the factors influencing the choice of a fitness club, consider the cost of its subscription. So, "Sport Life" offers only annual cards, not always financially possible, although convenient. Other clubs offer one-time classes, which, in our opinion, provides an opportunity to receive various types of services during the month, half-year and year. Prices range from 300 to 450 UAH/month. Positive in the activities of all fitness clubs are promotional offers that are provided to customers.

It should be noted that not all fitness clubs update information on their websites in time, slows down the timely acquaintance of potential and current customers with shares, new products, etc.

## Conclusions

1. In Ukraine, there is a positive trend of growth in the num-

**Table 3**

**Characteristics of the most popular fitness clubs in Lviv**

Fitness clubs, location	Area	Card category / price	Fitness services (varieties of fitness programs)
Malibu Sakharova, 45 V. Velikogo, 123	500 m <sup>2</sup>	VIP-card for the year - 4200 UAH VIP-card for half a year - 2400 UAH Fitness+gym – 299 UAH/month.	Body Sculpt; Yoga; Fitness intensive; Pilates; Slim Body; 90-60-90; Pil+Stretching; 50/50 step+abs; Fitness mix; Body Shape; Step aerobics Total body; Fit-zoom; Stretching; Tai boo; Body Pump; Step aerobics "Healthy back"; Cool fizra (10 to 16 years old) & Sport kids (2 to 10 years old); "Advanced course"; Fitness Manager
<b>Sport Life</b> Heroes UPA, 72 Zubrivskaya, 38 Chornovil, 67b Scientific, 7d	4000m <sup>2</sup> 5500 m <sup>2</sup> 3000 m <sup>2</sup> 1000 m <sup>2</sup>	Lux&SPA, Premium – 7990 UAH/year Classic+b – 6490 UAH/year Classic – 4190 UAH/year (promotional prices)	Basic Yoga; Hatha Yoga; TABS; AA Aqua Strong; SuperTilo; Elastic Sidnichki; Step 1; Aqua Legs + Press; Basic Cycle; Thai Bo; TRX; Basic step; Step Puzzle; Pilates Matwork; Dance Mix; 90-60-90; Upper Body; Stretching 45; ABS; AC Power Stretch +; Body Sculpt; Tabata; Functional Force; Aqua Noodles; Squash; Aerobic Dance; TBW; AC Beginner Swimmers; ABT; Boxing; Bosu Interval; Functional Training; Dance Mix; Aqua Freestyle; Upper Body; Fly Yoga; Aqua Strong Gym, Children's Fitness Academy; SPA area: sauna, massage
<b>Olymp</b> Shchyretska, 36 Old Market, 8 Khutorivka, 26 B. Khmelnytsky, 176	1700 m <sup>2</sup> 400 m <sup>2</sup> 400 m <sup>2</sup>	Morning – 390 UAH/month; 1640 UAH/6 months; 690 UAH/year Day – 340 UAH/month; 390 UAH/6 months; 2290 UAH/year; Unlimited – 490 UAH/month; 2090 UAH/6 months; 3390 UAH/year Universal – 4900 UAH/year	Gym; Step aerobics; 90-60-90; Yoga Pilates; Zumba; Crossfit; power step aerobics; Express Slimming bodyexpiration; FitnessMix; functional training; dance aerobics Table tennis SPA area: sauna, massage
<b>Kiwi fitness</b> Masaryka, 2 Scientific, 43b Bandera, 18 Stefanik, 21	180 m <sup>2</sup> – 260 m <sup>2</sup>	Universal morning – 592 UAH/month; 2928 UAH/6 months; 4608 UAH / year Universal classic – 672 UAH/month; 2928 UAH/6 months; 4608 UAH/year Kids – 480 UAH/month; Student – 544 UAH/month Express (30 min) with different number of classes in the subscription – 384 UAH / month	Body Shape; Pilates; or pregnant women); Pole Junior (9–13 years old); No dance; Hatha Yoga; Stripplasty; Zumba The program of weight loss "8 weeks"; Anti-cellulite program SPA area: massage, phytobacteria
<b>FitCurves</b> 8 clubs	218 m <sup>2</sup>	From 199 to 379 UAH/month.	30-minute cycle training
<b>Forever</b> Stepanivna, 45 Zelena, 20	235 m <sup>2</sup>	Unlimited – 400–450 UAH/month; 3570 UAH/year	Eastern dance; Yoga for children; Functional training; Pilates + Fitball; spinbike aerobics; track fit; dance mix; step fit; Complex for weight loss; Children's gymnastics (7–13 years old); yoga fit; Yoga Basic; Stretching + myofas; release; A slim body; Functional training; jumping; bodi scalp + jumping; children's group "TeenS"; jazz fenc; hip-hop Gym, table tennis
<b>League</b> Shafarika, 16a Kalnyshevskogo, 16	500 m <sup>2</sup>	Liga Vip – 999 UAH/month; 9000 UAH / year Unlimited – 650 UAH/month; 6000 UAH/year Daily – 450 UAH/month; 4000 UAH / year	Body Sculpt, Hip Hop, Intensive Weight Loss, TRX, Karate, Boxing, Pilates, Choreography, Fit Form, Strech intensive Gym SPA area: sauna, massage, solarium

ber of people engaged in various types of recreational motor activity. Creating conditions for improving the health of the population is one of the important tasks of state policy in the field of physical culture and sports. One of the most promising industries in the service sector can be considered physical culture and sports, in particular – the fitness industry. The market of fitness services in Ukraine is actively growing and remains promising in the future.

2. In Lviv, conditions are created to ensure the holding of meaningful and active leisure of the population, 78 fitness clubs, 16 swimming pools, 64 sports clubs, 6 tennis courts, 10 stadiums, etc. are functioning. However, consumers of fitness services is only 51576 people (6,8%).

3. Analysis of the most popular fitness clubs in Lviv: "Fit-Curves", "Sport Life", "Kiwi fitness", "Olympus", "Malibu",

"Forever" and "League" allowed to form their characteristics. All these institutions offer and provide a wide range of fitness services to the city's population. Fitness club "FitCurves" provides services only to women, but the fitness club "Olympus" is the only one that offers Crossfit services. Clubs "Malibu", "Kiwi fitness" have schools for the preparation of group trainers. Social responsibility is one of the most important principles of the network "Sport Life". The pricing policy of establishments of the fitness industry of the city is different, which forms offers of different cost of season tickets (cards) and the duration of their action (from one-time annual attendance of classes).

**Prospects for further research.** The focus will be on studying the external and internal environment of the most popular fitness clubs in Lviv.



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