



THE EUROPEAN FITNESS INDUSTRY: CURRENT STATE AND DEVELOPMENT PROSPECTS

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The article provides a comprehensive analysis of the European fitness services market during a period of global challenges and digitalization. The relevance of the study is driven by the transition of fitness from the service industry category to the status of a strategic tool for national resilience and preventive medicine. For Ukraine, studying the European experience is critically important in the context of population rehabilitation and the restoration of human capital in the post-war period.

The aim of the work is to characterize the current state of the fitness industry in European countries and to identify key directions for its development. The reporting documents of international organizations: EuropeActive, Deloitte, IHRSA, and HFA for the period of 2019–2024 were analyzed. These organizations are the most authoritative in the health and fitness industry; therefore, the reliability of their data is beyond doubt.

It was established that after an 11.4% decline in industry revenue due to the COVID-19 pandemic, a rapid recovery began in 2021. The projected profit of the European market for 2025 reached 38–40 billion euros. Market leaders were identified: as of 2024, the top three by revenue are the United Kingdom, Germany, and Spain. It is proven that the pandemic became a catalyst for the "digital revolution": the online fitness segment shows a growth rate of 33.1% per year. It is expected that by 2028, the share of traditional gyms in total revenue will decrease from 61% to 30% due to the expansion of fitness trackers, mobile applications, virtual reality (VR), etc.

Key trends of the "new reality" are identified: the Silver Fitness concept (active longevity), biohacking (Wearables 2.0), hybrid Omni-fitness models, and 24/7 club automation. The practical significance lies in the possibility of adapting European models (particularly corporate platforms like Wellhub) to form an innovative fitness services market in Ukraine, which will contribute to European integration and the strengthening of national health.

Key words: fitness industry, health-improving fitness, statistical indicators, fitness services market, health.

Чеховська Любов, Турка Ростислав, Наконечна Анна, Грибовська Наталія, Цяя Андріана. Фітнес-індустрія Європи: стан і перспективи розвитку

У статті проведено комплексний аналіз європейського ринку фітнес-послуг у період глобальних викликів та цифровізації. Актуальність дослідження зумовлена переходом фітнесу з категорії індустрії послуг у статус стратегічного інструменту національної стійкості та профілактичної медицини. Для України вивчення європейського досвіду є критично важливим у контексті реабілітації населення та відновлення людського капіталу в поствоєнний період.

Метою роботи є характеристика сучасного стану функціонування фітнес-індустрії країн Європи та визначення ключових напрямів її розвитку. Проаналізовано документи звітності міжнародних організацій: EuropeActive, Deloitte, IHRSA та HFA за 2019–2024 рр., які є найбільш авторитетними у системі оздоровчого фітнесу, тому достовірність їхніх даних не викликає сумніву.

Встановлено, що після падіння доходів галузі на 11,4% через пандемію COVID-19, з 2021 року розпочалося стрімке відновлення. Прогнозований прибуток європейського ринку на 2025 рік сягав 38-40 млрд євро. Виявлено лідерів ринку: топ-3 за доходами на 2024 рік складають Великобританія, Німеччина та Іспанія. Доведено, що пандемія стала каталізатором «цифрової революції»: сегмент онлайн-фітнесу демонструє темпи зростання 33,1% на рік. Очікується, що до 2028 року частка традиційних тренажерних залів у загальному доході знизиться з 61% до 30% за рахунок експансії фітнес-трекерів, мобільних додатків та віртуальної реальності (VR) тощо.

Визначено ключові тренди «нової реальності»: концепція Silver Fitness (активне довголіття), біохакінг (Wearables 2.0), гібридні моделі Omni-fitness та автоматизація клубів 24/7. Практичне значення полягає у можливості адаптації європейських моделей (зокрема корпоративних платформ типу Wellhub) для формування інноваційного ринку фітнес-послуг в Україні, що сприятиме євроінтеграції та зміцненню здоров'я нації.

Ключові слова: фітнес-індустрія, оздоровчий фітнес, статистичні показники, ринок фітнес-послуг, здоров'я.

Introduction. Researching the current state and prospects of the European fitness industry is highly relevant due to the profound transformation of the sector. Having overcome the consequences of the pandemic, the market has reached a new level where fitness has ceased to be merely a "service industry" and has become a strategic tool for national resilience [3]. Simultaneously, there is a growing urgency to integrate fitness services into the healthcare system as a method for preventing chronic diseases.

Today, the world's most competitive economies are those in countries that establish high social standards and promote comprehensive human development. There is a shift in focus – from the consumption of material goods to intangible services. Therefore, a global trend today is the growing interest in a healthy lifestyle (Wellness-lifestyle), with fitness becoming increasingly popular worldwide, evolving from a hobby into a basic social need.

Existing scientific literature includes studies on the state and development prospects of the global fitness industry up to 2017 [1]. Unfortunately, the European fitness services market remains insufficiently explored.

Modern fitness in Europe is increasingly focused on active longevity (Silver Fitness) and mental recovery. For Ukraine, which is currently overcoming the consequences of the war, studying the European experience of rehabilitation through fitness and socialization through sports is a matter of national security and the restoration of human capital.

Therefore, we consider this research to be both relevant and necessary, not only from the perspective of economic analysis but also with the aim of adapting best European practices to form a new, resilient, and innovative model for the fitness services market in Ukraine. This will undoubtedly facilitate the rapid integration of our state into the European space.

The aim of the study is to characterize the current state of the fitness industry in European countries.

Materials and methods. Theoretical and analytical methods were applied during the research process. A systemic analysis was conducted, which enabled the investigation of the organizational support within the health-improving fitness system. Structural-functional analysis allowed for identifying the specific operational features of the health-improving fitness system in Europe.

The study analyzed reporting documents for 2019–2024 from EuropeActive and Deloitte, the International Health, Racquet & Sportsclub Association (IHRSA) (until 2024),

and the Health & Fitness Association (HFA) (since 2024 – the new name for IHRSA). These organizations are the most authoritative in the health-improving fitness system; therefore, the reliability of their data is beyond doubt.

Discussion. The international fitness industry had been developing and strengthening on the global stage until 2019 (Table 1) [7]. However, due to the pandemic, total revenue decreased by 11.4% to 17.1 billion euros (Fig. 1).

Table 1

Indicators of the European Fitness Industry Performance [2, 11, 12]

Рік	Прибуток, млрд євро	Кількість фітнес-клубів	Кількість членів, млн
2017	26	54710	55,0
2019	28,2	63644	65,0
2020	19,3	62 775	54,8
2021	17,1	63171	56,3
2022	28,0	63500	62,9
2023	31,8	63830	67,6
2024	36,0	64550	71,6
2025	~38-40*	~66 000*	~75-76*

* – результати звітності будуть у березні 2026 р.

Europe was the global region that recorded the highest growth in membership between 2021 and 2022, while Anytime Fitness was the operator with the largest number of locations worldwide at the end of 2022 (5,143 locations). In Europe, Basic-Fit achieved a 51% increase in membership from 2021 to 2022, with the number of members rising from 2.22 million to 3.3 million. The French operator Keepcool increased its membership by 43%, reaching over 400,000 members by the end of 2022. The Fitness Park Group, also based in France, recorded a 33% growth in membership, reaching 835,000 by the end of 2022 [8, 9].

All European countries experienced financial growth prior to the COVID-19 pandemic (Fig. 1).

Statistical analysis revealed that Germany and the United Kingdom were the largest fitness markets in Europe in 2019, each valued at approximately €5.51 billion. Specifically, the German market grew by 3.4%, while its membership increased by 5.1%. Following these two leaders were France (€2.6 billion), Spain (€2.4 billion), and Italy (€2.3 billion) (Fig. 2).

Collectively, they accounted for 65% of the total European fitness market revenue in 2019. Regarding Germany, its revenue dynamics are presented in Fig. 3.

The primary reason for the decline in revenue during 2020–2021 was the mandatory closure of fitness clubs in many European countries for several months due to the pandemic. The operating status of fitness clubs in selected European countries in 2020 is presented in Fig. 5.

It should be noted that in the figure, green indicates that fitness clubs were operational subject to COVID-19 restrictions; light blue signifies that clubs were closed in most parts of the country; and gray represents a nationwide closure of clubs. Consequently, Sweden had no restrictions in 2020 and 2021, and all fitness clubs remained operational. In contrast, Ireland (63%), the United Kingdom (50%), France and Italy (46% each, respectively), and Poland and Belgium (42%) experienced the highest proportion of non-operational periods for fitness clubs. Since June 2021, the situation in most European countries has improved, with fitness clubs resuming their operations.

In 2020, the fitness industry experienced a revenue decline of over 32%; however, a recovery began in 2021, reaching 0.55% of pre-pandemic levels. Overall, experts

project steady revenue growth for the fitness industry through 2028 (Fig. 6).

Undoubtedly, the COVID-19 pandemic "adversely affected" and "reshaped" the performance metrics of the fitness industry. As of 2024, the revenue situation has improved, and the top three countries by revenue are: the United Kingdom (~€6.7 billion), Germany (~€5.8 billion), and Spain (~€2.6 billion). This revenue growth occurred not only due to new clients but also as a result of increased membership prices driven by inflation [6].

According to the 2025 European Health & Fitness Market Report, EuropeActive [6] provides information regarding the share of the population that exercises regularly (Fig. 7).

It should be noted that the segments of online/digital fitness, fitness applications, equipment, and fitness trackers, among others, experienced significant growth due to the pandemic. During the lockdown periods, sports competitions were launched via digital platforms (YouTube, Facebook, Instagram, etc.) to encourage physical activity among as many people as possible. Consequently, the digitalization

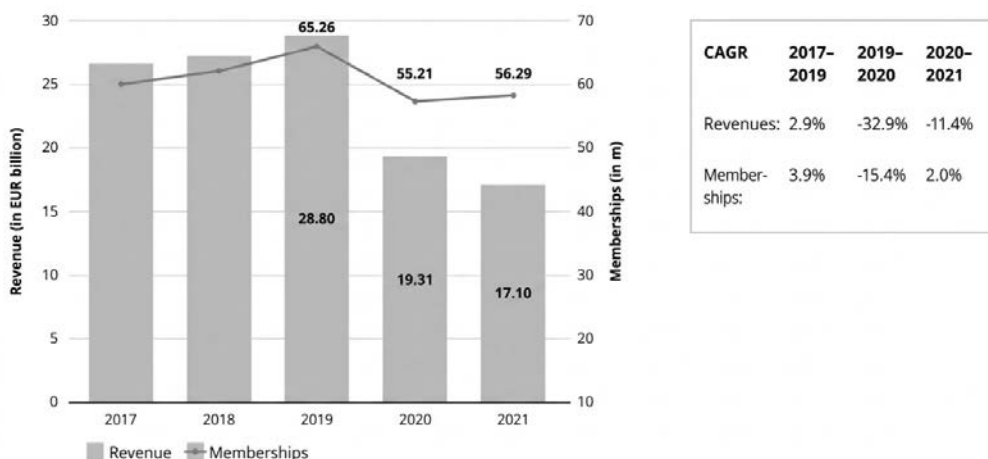


Fig. 1. Trends in revenue and membership (2017–2021) [7, 11, 12]

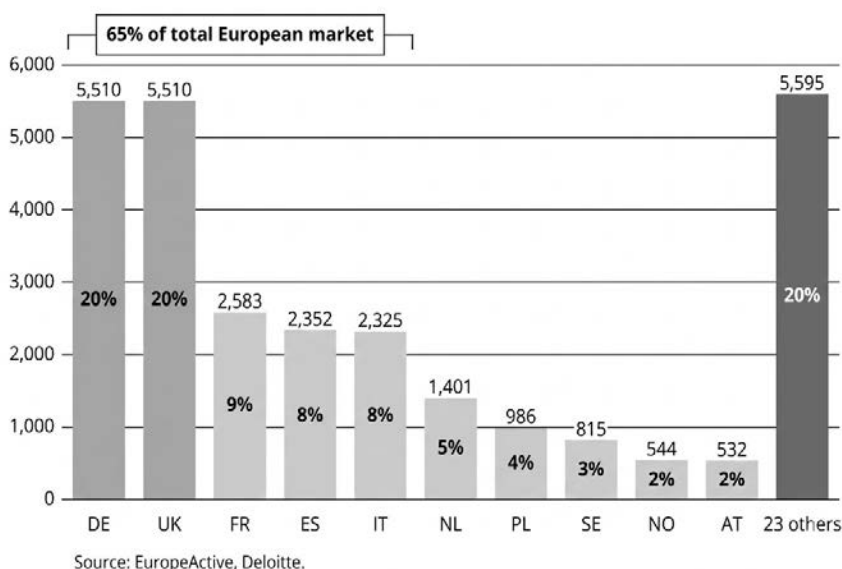


Fig. 2. Top 10 European fitness markets (EUR million, 2019) [2, 5, 11, 12]

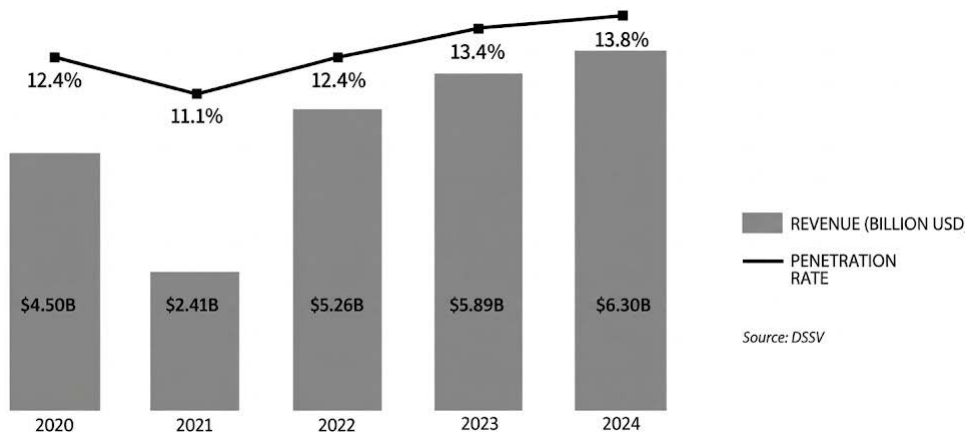


Fig. 3. Revenue dynamics of the German fitness industry (2020–2024) [6]

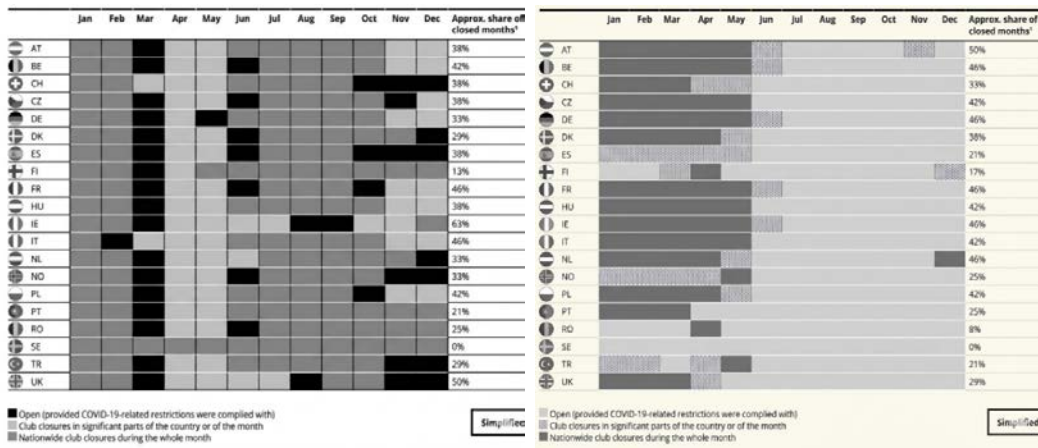


Fig. 5. Operating status of fitness clubs in selected European countries in 2020 and 2021 [2, 11, 12]

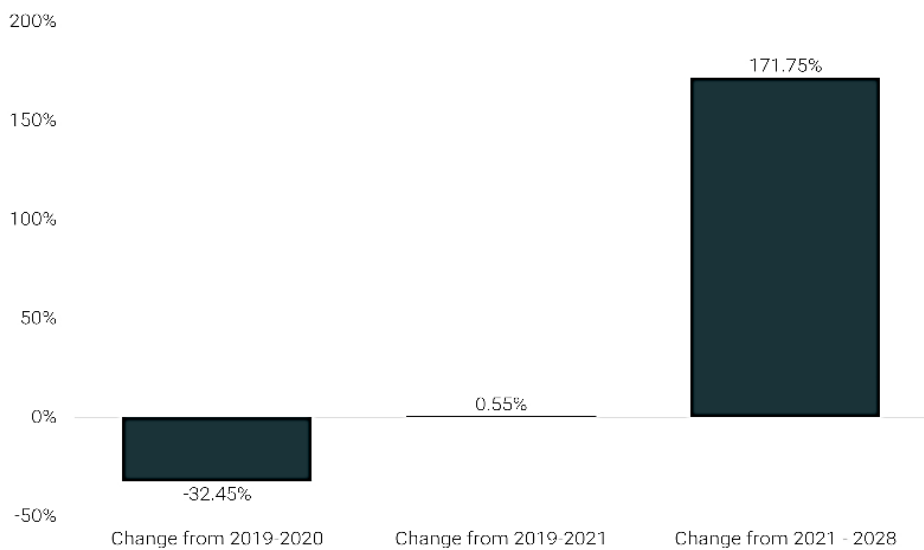


Fig. 6. Fitness industry revenue: current status and projections [2, 11, 12]

of society and the fitness market provided an opportunity for effective adaptation during this crisis period.

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The fitness equipment industry demonstrated the most substantial growth during the first year of the pandemic, increasing by 50.6% from 6.8 billion in 2019 to 10.2 billion in 2020. The supply of on-demand fitness content, including live streams and pre-recorded sessions, grew by 76.7% from 6.1 billion in 2019 to 10.7 billion by the end of 2021 [11, 12].

Specifically, in 2020, online/digital fitness revenue rose by 40.61%, and by the end of 2021, it had increased by 66.32% compared to pre-pandemic levels. The online and virtual fitness industry is evolving rapidly, growing from \$15.65 billion in 2022 to \$21.82 billion in 2023.

Experts project that from 2021 to 2028, the online/digital fitness industry will have the highest growth rate, at 33.10% annually. By 2026, the global digital fitness market is expected to reach \$26.5 billion in revenue, representing a threefold increase [4, 5, 10, 13].

Other segments that experienced growth include wearable fitness trackers (a 63.8% increase compared to 2019–2021) and fitness applications (a 65.2% increase compared to 2019–2021). Forecasts for the fitness app market remain optimistic, with the market growing by 12% in 2024 (Fig. 8).

Thus, online/digital platforms (apps, streaming) experienced explosive growth during the pandemic and remain a primary driver with billions in revenue and downloads.

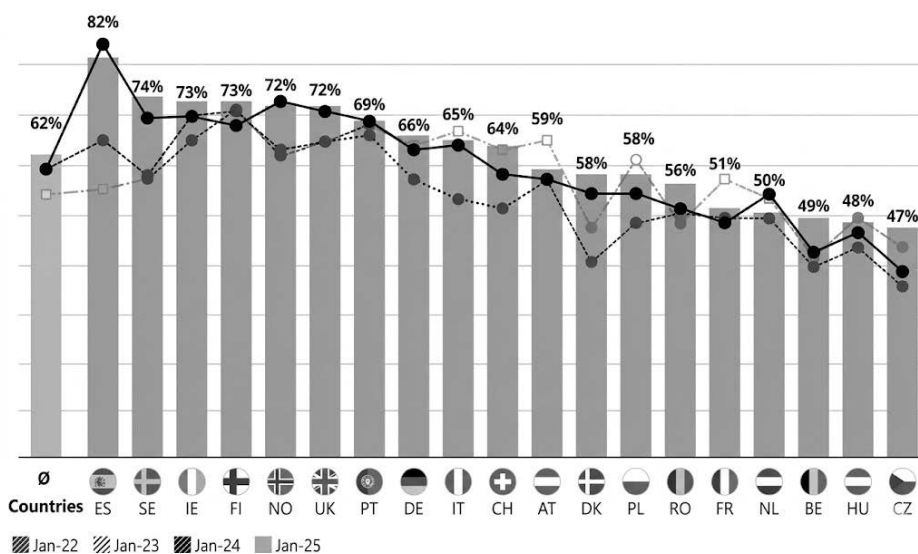


Fig. 7. Share of the population exercising regularly by country (2022–2025) [2, 6, 11, 12]

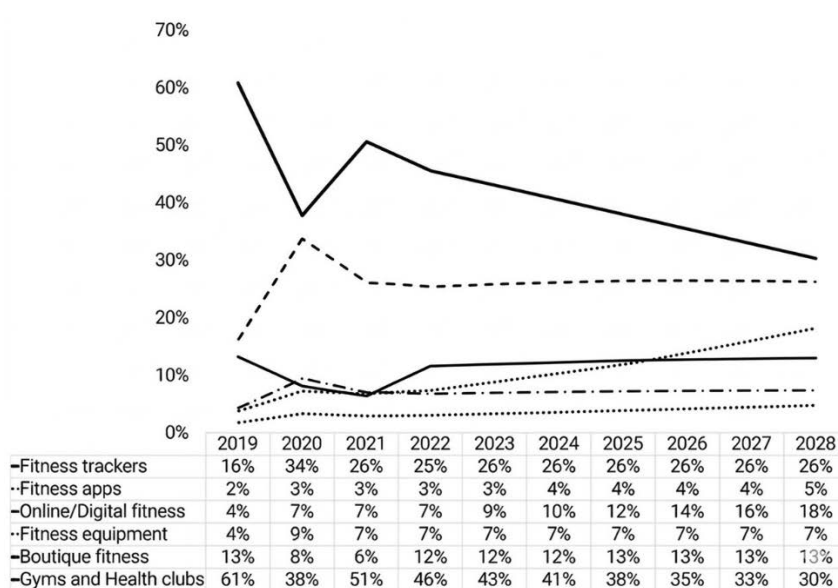


Fig. 8. Market dynamics of fitness industry segments, 2019–2028 [4, 5, 10, 13]

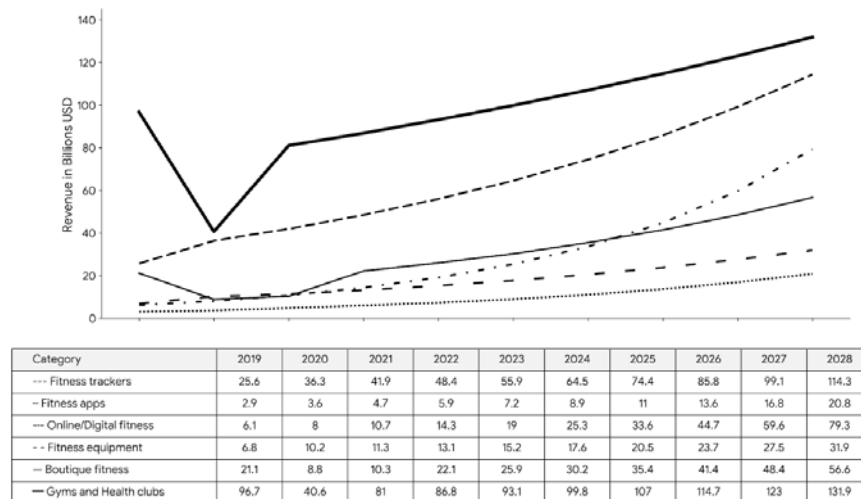


Fig. 9. Fitness industry revenue by segment (2019–2028) [4, 5, 10, 13]

Wearable devices and virtual reality (VR) enhance engagement and personalization (Fig. 9).

It should be noted that gyms were the long-standing backbone of the fitness industry, accounting for 61% of total sector revenue as of 2019 (\$96.7 billion). However, in 2020, their revenue plummeted by more than 50%. This marked the first instance where gyms failed to generate more than half of the fitness industry's total income. Due to the rapid expansion of other segments, gyms are projected to account for only 30% of total industry revenue by 2028 [4, 5, 10, 13].

In 2024–2025, the fitness industry experienced rapid growth, with total revenue estimated at approximately \$257 billion. Forecasts indicate further growth exceeding \$400 billion by 2028–2030, supported by strong operator confidence and increased consumer spending on both physical clubs and digital solutions [4, 5, 10, 13].

The two primary segments gaining a larger share of the fitness market include:

- **Fitness trackers:** expected to grow from a 16% market share in 2019 (\$25.6 billion in revenue) to 26% by 2028 (\$114.3 billion);

- **Online/digital fitness:** projected to increase from 4% of the market in 2019 (\$6.1 billion) to 18% by 2028 (\$79.3 billion).

The two segments with the smallest market shares between 2021 and 2028 are:

- **Fitness applications:** market share is expected to rise from 3% in 2021 (\$4.7 billion) to 5% in 2028 (\$20.8 billion);

- **Fitness equipment:** the market share is anticipated to remain stable at 7%, growing in absolute terms from \$11.3 billion in 2021 to \$31.9 billion in 2028 [4, 5, 10, 13].

In conclusion, the fitness industry has undergone a revolution driven by technological innovation over the last decade. Smart devices, health and fitness tracking apps, virtual reality (VR) training, and various online platforms have become integral components of the workout experience. This convergence of fitness and technology allows users to track their progress, access personalized training plans, and exercise anywhere at any time.

It is also important to note that biohacking and data monitoring have gained significant prominence in Europe. This includes the use of advanced biosensors (Wearables 2.0) to track not only heart rate but also glucose levels, lactate, and stress (HRV – Heart Rate Variability). European fitness clubs are already integrating this data into personalized training plans [4, 5, 10, 13].

European countries are increasingly transforming fitness clubs into recovery centers, where cryochambers, lymphatic drainage, and infrared saunas are considered as essential as the free weights area.

The hybrid fitness model continues to evolve, combining online platforms with offline services and utilizing Artificial Intelligence (AI) for personalized training. AI acts as a real-time personal coach, analyzing exercise technique via smartphone cameras. Furthermore, the "Omni-fitness" model – which integrates gym-based, home-based, and outdoor workouts – is gaining significant traction.

There is a massive rollout of automated 24/7 fitness clubs that operate without the constant presence of staff (similar to the Basic-Fit chain). This approach allows for a reduction in membership costs while maintaining high-quality equipment [4, 5, 10, 13].

The use of aggregator platforms (such as "Wellhub"), which consolidate hundreds of gyms into a single corporate membership, is also expanding. For the Ukrainian IT and corporate sectors, this serves as a key tool for talent retention [4, 5, 10, 13].

Conclusions.

1. **High Adaptability of the European Fitness Market:** The European fitness market has demonstrated remarkable resilience. Following a critical decline in revenue during the pandemic (dropping to €17.1 billion in 2021), the sector not only returned to pre-crisis levels during 2022–2023 but also entered a trajectory of rapid growth. Projected revenues for 2025 (€38–40 billion) and the expected membership count (75–76 million people) indicate that fitness has become an essential part of the European consumer's expenditure.

2. Historical Shift in Market Structure: A fundamental structural shift has occurred. While traditional gyms generated 61% of total revenue in 2019, their share is projected to decrease to 30% by 2028. This is explained by the accelerated growth of other segments, such as digital platforms, wearable devices, and on-demand services.

3. Digital Transformation and Wearables 2.0: The pandemic acted as a catalyst for a "digital explosion." The online fitness segment is demonstrating the highest growth rates (33.1% annually). Key drivers include Wearables 2.0, where fitness trackers are transforming into sophisticated medical-grade devices for monitoring stress (HRV), glucose, and lactate levels, as well as the implementation of AI-coaching that analyzes exercise technique via smartphone cameras in real-time.

4. Strategic Models for Future Development: The European market is actively adopting three key models that hold significant promise for Ukraine:

– Hybrid Fitness (Omni-fitness): Integrating gym-based, home-based, and outdoor workouts into a single ecosystem.

– Automation (High-Value Low-Price): The success of chains like Basic-Fit proves the efficiency of 24/7 gyms without permanent on-site staff, which reduces costs for the end-user.

– Corporate Aggregators: Platforms like Wellhub integrate fitness into corporate benefit packages, becoming a standard for modern businesses.

5. Focus on Holistic Wellness and Personalization: In 2024, the fitness industry showed robust recovery driven by a focus on holistic wellness, advanced technologies (AI, VR, and wearables), deep personalization, and hybrid models. These trends, coupled with rising revenues, confirm that an increasing number of people consider fitness a vital component of their lives.

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