

2024 SPANISH SURVEY TRENDS

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Abstract

This is the eighth edition of the National Surveys of Fitness Trends in Spain, which replicate the methodology of international surveys on global fitness trends developed and promoted by the American College of Sports Medicine (ACSM). As with every year since 2017, the objective of this study is to determine the main trends in the Spanish fitness sector based on the results obtained from the survey conducted for the year 2024, as well as to compare these results with those reported in the national and international surveys of 2023. Additionally, the potential current impact of COVID-19 on the sector and the main trends identified by the respondents also were analyzed.

Key words: Spanish fitness survey, fitness trends, fitness industry, ACSM survey

The online survey was initially sent to 7,055 fitness professionals in Spanish including the database of Valgo Consulting. A link also was shared on social networking sites such as Facebook, Twitter, Instagram, and LinkedIn, as well as through newsletters of several collaborating institutions such as the General Council of Colleges for Physical and Sports Education (COLEF), the National Strength and Conditioning Association Spain (NSCA), and the Federation of Sports Management Associations of Spain (FAGDE). The survey, conducted via Google Forms, was open From May 25 through July 10, 2023 (approximately 7 weeks). A total of 511 reponses from all Spanish regions were collected, for a response rate of 7.2%. The survey contained a total of 54 trends (see Appendix I below for more details).

Most of the respondents were men, while women accounted for 28.4% of the sample, which covered a wide range of ages, with the majority group of responders being in the range of "between 33 and 44 years old" (33,5%), followed by "between 22 and 34 years old", and "between 45 and 54 years old" (32,3 % and 22.6% respectively). Almost two-thirds of the respondents have more than 10 years of experience working in the sector (60.5%) and 47.9% develop their professional work within the commercial fitness sector. A total of 88.9% of those surveyed are full-time or part-time active workers. For 80.5% of respondents, their work in the fitness sector is their main occupation. Most of those surveyed work in private fitness centers (36.8%), 27.4% in public management centers, 13.7% in studios or boutiques, 3.7% declare that they work in an online setting, and 2.6% mainly work online or at home. A total of 53.3% of the sample occupies intermediate or responsible positions (such as owner of the center, manager, technical director, or coordinator (and the majority of professionals declare that they have an income below € 25,000 / year (59.8%).

APPENDIX 1:

Rank	TRENDS	Average	SD
1	Functional fitness training	8.41	1.48
2	Employing certified professionals"	8.30	1.93
3	Small group ("personal") training	8.15	1.84

4	Personal training	8.08	1.76
5	Licensure for fitness professionals	7.97	2.11
6	Exercise and weight loss	7.96	1.64
7	Fitness programs for older adults	7.83	1.80
8	High intensity Functional training (HIFT)	7.79	1.56
9	Multidisciplinary work teams	7.74	2.16
10	Traditional strength training (free-weights)	7.72	1.78
11	Post-rehabilitation or disease/condition maintenance classes	7.67	1.87
12	Fitness & nutrition (Healthy diet)	7.61	1.83
13	Group training	7.56	1.79
14	High intensity interval training (HIIT)	7.54	1.66
15	Injury prevention/ functional rehabilitation	7.52	1.88
16	Outdoor fitness activities	7.51	1.90
17	Outcomes measurement	7.49	2.00
18	Body weight training	7.45	1.82
19	Core training	7.26	1.87
20	Wearable technology	7.25	2.05
21	Physician referrals to fitness programs (Exercise Prescriptions)	7.24	2.24
22	Exercise is Medicine (EIM)	7.20	2.32
23	Mobile exercise apps	7.15	2.05
24	Seeking new market niches	7.12	2.10
25	Workplace health and exercise programs	7.12	2.17
26	Boutique Fitness Center	7.11	2.18
27	Exercise for mental health	7.09	2.19
28	Circuit training	7.06	1.88
29	Lifestyle Medicine	6.96	2.14
30	Exercise programs against children and adolescent obesity	6.94	2.32
31	Postural fitness	6.91	2.09
32	Pre-natal y post-natal fitness	6.87	2.13
	Health/wellness coaching	6.76	2.29
34	Pilates	6.74	2.19
35	Yoga	6.71	2.05
36	Data-driven training technology	6.70	2.24
37	Exercise for children	6.67	2.20
38	Running/jogging/walking biking clubs	6.64	2.14
39	Low-cost and budget gyms	6.60	2.41
40	Balance and stabilization Training	6.56	2.17
41	Mobility/myofascial devices/rollers	6.44	2.15
42	Aquatic exercise	6.24	2.30
43	Boxing, kickboxing and mixed martial arts (MMA)	6.21	2.24
44	Home exercise gyms	6.08	2.20
45	Fitness influencers	6.03	2.70
46	Resistance band training	6.02	2.21
47	Health Clubs y Spas	6.01	2.26

48	Online personal training	5.99	2.42
49	Strech-based training	5.85	2.33
50	Dance-based workouts "	5.83	2.32
51	Plyometric training	5.82	2.22
52	Online live and on-demand exercise classes	5.79	2.30
53	Virtual reality exercise training	5.25	2.47
54	Electrical muscles stimulation (EMS) training	4.30	2.46

Note: The rows with an orange background are Spain-specific potential trends added in the survey.

APPENDIX 2:

Fitness trend excluded from Spanish survey included:

- Reimbursement for Qualified Exercise Professionals
- Subscription Based Membership
- Long-term Youth Development

APPENDIX 3:

Table 1

Sample characteristics

<i>Sex</i>	
Woman	28.4
Man	71.6
<i>Age</i>	
Less than 21 years	1.6
From 22 to 34 years	32.3
From 35 to 44 years	33.5
From 45 to 54 years	22.7
More than 55 years	10.0
<i>Experiencia in fitness sector</i>	
Less than 1 year	2.3
From 1 to 3 years	9.0
From 4 to 6 years	12.3
From 7 to 9 years	13.9
From 10 to 20 years	33.7
More than 20 years	26.8
I have not experience in fitness sector	2.0
<i>Place of work</i>	
Privado center	36.8
Públic center	27.4
Studio o boutique	13.7
Outdoor places	3.7
Work at home	0.4
Mainly online work	2.2
Others	15.8
<i>Sector of fitness</i>	
Comercial fitness	47.9
Community fitness	13.9
Corporative fitness	21.3
Medical fitness	8.8

Others	8.0
<i>Job situation in fitness sector</i>	
Main job	80.5
Second job	9.8
Third job or more	1.2
Currently, I am not working in the fitness sector	3.2
Other	5.3
<i>Dedication to fitness sector</i>	
Full time	65.8
Part-time without any other job	8.6
Part-time with other job	14.5
I have had a job in fitness sector but now I have changed	4.5
I currently do not have a job in fitness sector, I am unemployed	1.6
Otros	5.0

Note: data are presented in percentages (%)

Table 2
Position and annual income of responders

<i>Type of job</i>	
Center owner /Business man	17,3
Manager	12,3
Technical director	12,3
Coordinator	11,4
Multidisciplinary instructor	9,2
Classroom instructor	1,2
Group training instructor	3,9
Personal trainer (full time)	8,0
Personal trainer (Part-time)	7,0
Teacher	2,5
Health professional (doctor, fisioherapist, etc.)	1,4
Graduated Student	0,4
Ungraduated Student	0,6
None. I do not currently have job in fitness sector	5,9
Otros	12,5
<i>Ingresos brutos anuales</i>	
Less than 10.000 €	13,7
From 10.000 to 14.999 €	9,2
From 15.000 to 19.999 €	12,9
From 20.000 to 24.999 €	13,1
From 25.000 to 29.999 €	10,9
From 30.000 to 34.999 €	6,3
From 35.000 to 39.999 €	6,5
From 40.000 to 44.999 €	6,5
From 45.000 to 49.999 €	4,5
More than 50.000 €	8,4
I do not have any income from a job in fitness sector	8,4

Note: los datos son presentados en porcentaje (%)

Table 3.
Top 20 Trends in Spain for 2024

1	Functional fitness training
2	Employing certified professionals”
3	Small group (“personal”) training
4	Personal training
5	Licensure for fitness professionals
6	Exercise and weight loss
7	Fitness programs for older adults
8	High intensity Functional training (HIFT)
9	Multidisciplinary work teams
10	Traditional strength training (free-weights)
11	Post-rehabilitation or disease/condition maintenance classes
12	Fitness & nutrition (Healthy diet)
13	Group training
14	High intensity interval training (HIIT)
15	Injury prevention/ functional rehabilitation
16	Outdoor fitness activities
17	Outcomes measurement
18	Body weight training
19	Core training
20	Wearable technology

What were the 3 to 5 major takeaways from your country's/region's 2024 survey results?

- There is almost nothing surprising about the 2024 Spanish survey, as 18 out of 20 trends were the same as in 2023, with quite similar positions as well. Only two new trends entered the top 20, which were: "High-Intensity Functional Training (HIIT)" and "Portable technology (wearable)". On the other hand, the trends that came out of the top-20 were: "Exercise is Medicine" and "Apps for mobile devices".
- The trends related to the qualification, certification and licensing/regulation of fitness professionals are very relevant in Spain. The strength of this trend has grown in Spain, and the two related trends in the Spanish survey are now in the top-5 of the list. On the contrary, trends related to health such as "Exercise is Medicine", "Lifestyle and medicine" or "Health/wellness coaching" are not yet relevant in Spain.
- Trends related to functional training are widely accepted among fitness professionals in Spain. The trend "Functional Fitness Training" has once again obtained the first position for the second year in a row. Likewise, the "High-Intensity Functional Training" trend has managed to enter the top-10 (#8) in its first year of inclusion in the Spanish survey, causing the popularity of the "High-Intensity Interval Training" trend to drop (from #11 to #14).
- For yet another year, the "wearable technology" trend ranks very low in the Spanish ranking compared to its privileged position in worldwide surveys (five times in the top 1). However, this year the trend has managed to enter the top-20 of the Spanish survey (#20).

What are the biggest benefits of reporting the top 20 fitness trends in your country/region, and who benefits the most from your findings?

Reporting the 20 main fitness trends in Spain is undoubtedly beneficial for the fitness industry in our country, as this survey provides very useful information to the various fitness centers and professionals working in the sector, allowing them to develop proper investment and marketing strategies. Identifying specific trends in our country also is relevant since the results of national surveys since 2017 show that the 20 most relevant trends in Spain are always quite different from those identified in worldwide surveys, and this trend of divergence grows over time. In addition, by replicating the methodology of the international surveys of the American College of Sports Medicine (ACSM), it is possible to make comparisons between the results obtained at a national and international level, allowing us to know the interregional similarities and differences in the sector. This, in turn, makes it possible to guide key decision-making in the fitness industry in our country more effectively and accurately. Therefore, it is important that Spanish agents in the fitness sector have specific information available on local trends, as well as their evolution over time, as it helps the Spanish fitness and health industry to make critical decisions for its future growth and development.

As the world begins to rebound from the COVID-19 pandemic, what are the primary opportunities for the health and fitness industry in your country/region both currently and within the next year?

The 2024 Spanish Survey included a question about the situation of the fitness market after the COVID-19 pandemic. Two-thirds of the professionals affirm that the situation of the fitness sector in Spain has already largely recovered to pre-pandemic levels, and it is worth noting that a third believe that there is currently a greater demand than before

the pandemic. Somehow, it seems that the pandemic situation and home confinement made many people reflect on the importance of exercise for physical and mental health.

Some data (*e.g.*, Ding et al., 2020) showed that people in various countries increased their interest in exercise during the COVID-19 pandemic. This phenomenon could explain a possible increase in demand for fitness services after the pandemic. In such a way that some people took advantage of the pandemic situation to become aware of the importance of physical activity habits in their lives and thus be able to increase them. First, by doing physical activity at home during confinement. And, later, through the services provided by both professionals and health and fitness centers. The data reported by Deloitte & Europe Active (2023) on the fitness market in Europe support what has been described above. In the case of Spain, the data shows that in 2022 the fitness market in Spain was at the same level as in 2019 (11.3% vs. 11.2% penetration in the population, and 2.10 vs. 2.35 million euros of income). Similar trends were found in other countries in Europe, so it may be possible that membership and income in 2023 will be higher than in 2019 for the first time since.

Therefore, the main opportunity for the Spanish health and fitness industry is to keep these new users who are potentially reaching the fitness sector and try to encourage those who have increased their interest in exercise to consume the services offered by the different professionals. In addition, many fitness companies have invested heavily in developing online fitness services, so they have an opportunity to make them profitable in the post-pandemic era and use them to further attract members, as well as improve the quality of the services provided.

Please provide a brief paragraph about the limitations of your country's survey.

The 2024 Spanish survey has the limitations of a study based on online surveys (Díaz de Rada, 2012), that is, the lack of population representation and the low response rate associated. Since this survey has been distributed through social networks and institutional newsletters from collaborating institutions, it is not possible to calculate a precise response rate. However, taking as a reference the number of professionals to whom the survey was sent directly by email, the response rate was 7.2%. This rate can be considered reasonably good; being similar to the one obtained from 2019 to 2022, and better than the one obtained in the 2017 and 2018 surveys. The survey could not guarantee the population representation of the universe of the study (total set of fitness professionals). Likewise, the regional representation of the various areas of the country is not guaranteed. The data from the responses collected could suggest some territorial bias with the most populated areas of the country overrepresented (for example, the country's capital region, Madrid) and the least populated areas underrepresented. Furthermore, it is not possible to guarantee that other relevant potential trends existing in the market might not be included in the survey questionnaire, even though it was carefully crafted based on previous survey results, review of results in other countries, and the opinion of expert fitness professionals in Spain.

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What unique features/results do you think your survey highlights when compared to the U.S. survey results?

When the results of the 2024 Spanish survey are compared with those of the United States, eleven trends are different in the top-20, five more than the 2023 survey, which means a significant increase in the differences between both. Furthermore, it is noteworthy that more than half of the differences are specific local trends introduced only in the Spanish survey.

Specific Spanish trends in top-20 that are not in U.S. top-20

1. Exercise regulation of fitness professionals
2. High-intensity functional training (HIFT)
3. Nutrition and fitness (healthy diet)
4. Prevention/functional rehabilitation of injuries
5. Collective classes (Group training)
6. Monitoring of training results
7. Core training

No-specific Spanish trends in top-20 that are not in U.S. top-20

1. Small group (“personal”) training
2. Traditional strength training (based on free weights)
3. Multidisciplinary work teams (doctors, physiotherapists, nutritionists...)
4. High-intensity Interval Training (HIIT)

Trends in U.S top-20 that are not in Spanish Top-20

1. Reimbursement for qualified exercise professionals
2. Worksite health promotion
3. Health/wellness coaching
4. Exercise for mental health
5. Exercise is Medicine (EIM)
6. Pre- and post-natal fitness
7. Youth athletic development
8. Online personal training
9. Yoga
10. Lifestyle medicine
11. Boutique fitness studios

What surprised you the most about the results from the 2024 survey? Please answer this question with regards to the results specific to your country/region AND when comparing your country's/region's results to the U.S. survey results.

Regarding to Spain results

The Spanish results of the 2024 surveys are very similar to those of 2023, so there is almost nothing surprising about them. The only notable point is the incorporation into the top-20 of the trend of "High-Intensity Functional Training (HIFT)", different from the trend "High-Intensity Interval Training (HIIT)". The positions that they occupy also are interesting, since HIFT was ranked eighth, while HIIT was ranked 14. HIFT has been included for the first time in this edition of the Spanish survey, with the aim of differentiating this type of functional training from conventional and generic HIIT.

The better position of HIFT vs HIIT could be explained because what is normally offered in fitness centers as HIIT is actually a HIFT training, since the type of exercises used, and the intensity levels reached, may not correspond to what could theoretically be defined as a real HIIT workout. The goal of HIIT is to put extreme stress on the cellular energy production mechanisms to obtain physiological effects that are difficult to obtain with other types of training (including the HIFT training model). However, this issue may have an important theoretical-conceptual component and be controversial due to the poor definition of what HIIT training is or is not.

Regarding to comparison to U.S. survey

This year there are many striking differences between the results of the Spanish and American fitness trends survey, since more than half of the trends are different in the top-20 (eleven differences in the 2024 survey compared to six differences in the 2023 survey). To contextualize this great difference, it is worth highlighting a few points. First, there are big changes in the top-20 US trends from 2023 to 2024, so only 60% of the trends are the same and eight trends change in the top-20 (40%), which is probably the biggest change in the historical series of surveys on fitness trends in the US. To see this in context, only three trends were different in the US between the 2023 and 2022 surveys (85% agreement).

The following eight trends came out of the 2024 US survey: (i) strength training with free weights (ii) High-Intensity Interval Training (HIIT) (iii) core training (not included in ACSM trend proposal 2023) (iv) circuit training (v) home exercise gyms (vi) group exercise training (not included in the ACSM 2023 trend proposal) (vii) licensure for fitness professionals (viii) mobile exercise apps. By contrast, the following trends broke into the top-20 in the US (i) reimbursement for qualified exercise professionals (ii) worksite health promotion (iii) exercise for mental health (iv) pre and postnatal fitness (v) youth athletic development (vi) online personal training (vii) post rehabilitation of disease/conditions maintenance classes (viii) boutique fitness studios. One possible explanation for these large differences is that several trends in the 2023 US top-20 have not been proposed as potential trends in the 2024 US survey (core training, group exercise training, licensure for fitness professionals...) plus two of the top-20 are entered for the first time in the 2024 survey ("reimbursement for qualified exercise professionals" and "exercise for mental health").

Regarding the comparison of results from the US and Spain, these dramatic changes in the most relevant trends in the US could explain such large differences between the top-20 trends in Spain and the US. In addition to the fact that seven of eleven different trends are trends that have been proposed as potential trends in Spain but not in the US.

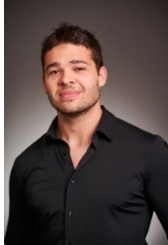
What are 3 to 5 major differences you noticed between your country's trends and the U.S. trends for 2022? What were 3 to 5 major similarities?

For a better understanding of the main differences between the results of Spain and the US, it must be considered that, as previously mentioned, seven of the eleven different trends were proposed as potential in Spain but not in the US, as well as two top-20 trends in the US were not proposed as potential in Spain. This means that, in fact, nine trends could never match. In this context, the most notable data is that four relevant US trends related to exercise and health promotion are not among the top 20 in Spain. These are "exercise for mental health", "ACSM's Exercise is Medicine", "lifestyle medicine", and "health/wellness coaching". This could mean that the fitness sector in the US is more integrated with the health sector than in Spain and that the importance given to physical exercise in promoting the health of the population is greater in the U.S. than in Spain.

Once again, the usual difference in the relevance of yoga in Spain and the U.S. is present. Another interesting phenomenon this year is the drastic decrease in the relevance of wearable technology as the main trend in the US, so this trend falls from the first position to the last position, occupying the same place that this trend occupies in the 2024 Spanish survey. Another noteworthy fact is that the first trend in the US ("reimbursement for qualified exercise professionals") has little relevance in the Spanish context, to the point that it was dismissed as a potential trend by the authors of the Spanish survey, because the health insurance systems in Spain and the US are very different, such that in Spain they are mostly public while in the US they are mostly private. The last notable difference is that online personal training is not indicated by Spanish fitness professionals as a relevant trend (forty-eighth position compared to twelfth in the United States). Perhaps it could be explained why the majority of those surveyed in Spain are professionals who work in fitness centers offering face-to-face services and few of them are professionals who have changed their work scenario to the virtual space through online services. However, we have the perception that online personal training in Spain is in fact more relevant than what the survey shows.



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