**Executive Summary: A Strategic Analysis of the Modern Fitness App Ecosystem and a Blueprint for Market Leadership**

The global fitness app market is in a phase of robust, sustained expansion, having successfully transitioned from a pandemic-driven surge to a new, higher baseline of consumer demand. The United States fitness app market alone is poised for significant growth, with a projected revenue of US$8,072.0 million by 2030, reflecting a steady compound annual growth rate (CAGR) of 11.4% from 2025 to 2030.1 This growth is not merely a quantitative increase but a qualitative shift, marked by a consumer pivot toward more holistic, daily-oriented, and psychologically incentivized forms of wellness.2 While "Exercise & weight loss" remains the largest segment, the rapid ascent of "Activity Tracking" signals a fundamental change in user behavior, from structured workout adherence to a broader integration of movement into daily life.1

This report presents a comprehensive analysis of the competitive landscape, examining the strategic models of leading applications: Nike Training Club, FitOn, SWEAT, LazyFit (Chair Workout), and Home Workout - No Equipment. The analysis reveals a diverse market where success is achieved through distinct, often contradictory, approaches. Nike Training Club (NTC) leverages a powerful brand ecosystem, offering a free, ad-free product as a gateway to its broader retail and membership platform.3 FitOn thrives on a freemium model, using a vast library of free, celebrity-led content to attract a massive user base and then converting a segment to a "PRO" subscription with high-value features.5 SWEAT has built a premium, subscription-based empire by creating a highly-engaged, niche community for women, demonstrating that a strong social core can justify a high price point.7 LazyFit’s success is a testament to the power of hyper-personalization, using an extensive psychological onboarding funnel to build user trust and commitment before presenting a paywall.9 Finally, the "no-equipment" apps, while limited in long-term revenue potential, serve a crucial role as frictionless entry points for new users.10

Synthesizing these findings, this report proposes a strategic blueprint for a market-leading "super-app." This application would not be a simple feature aggregation but a synergistic fusion of the best-in-class elements identified in the market analysis. The proposed platform would feature a meticulous, AI-powered onboarding funnel that generates a dynamically adjusting, long-term workout plan.9 This would be complemented by a vast, on-demand library of celebrity-led workouts and holistic wellness content, including nutrition and meditation.8 The app's core retention mechanism would be a gamified, community-driven ecosystem with rewards, challenges, and a dedicated social hub.2 Monetization would be a strategic freemium model, offering a compelling free tier for user acquisition while reserving the personalized, high-value, and deeply engaging features for a premium subscription. This approach positions the "super-app" to capture and retain a diverse user base, commanding a leading position in the evolving digital wellness landscape.

**The State of the Modern Fitness App Market: Trends and Tectonic Shifts**

**Market Size, Growth, and the Post-Pandemic Rebound**

The fitness app market is currently experiencing a period of significant expansion, moving beyond the short-lived, crisis-driven surge observed during the peak of the COVID-19 pandemic. Data indicates a robust and sustained growth trajectory that is establishing a new, higher baseline for the industry. The United States market, a primary driver of global revenue, is a focal point of this growth. Projections show that the U.S. fitness app market is expected to reach a total revenue of US$8,072.0 million by 2030, a substantial increase from its 2024 revenue of USD 4,234.1 million.1 This expansion is underpinned by a strong Compound Annual Growth Rate (CAGR) of 11.4% projected from 2025 to 2030, demonstrating a consistent and healthy market forecast.1

This market performance represents a significant recovery and re-acceleration following a period of slowing growth in 2022 and 2023.2 The initial market spike in 2020 was a direct response to global lockdowns, as consumers sought digital alternatives for their health and fitness routines. The subsequent market correction could have been misinterpreted as a return to pre-pandemic levels. However, the latest data from 2024 and the early part of 2025 demonstrate a different narrative. Global Health & Fitness app downloads reached a new all-time high of 3.6 billion in 2024, a 6% increase year-over-year. This rebound has been accompanied by record-high in-app purchase (IAP) revenue, with preliminary figures for January 2025 reaching a new all-time high of $385 million, a 10% year-over-year increase.2 The market's ability to not only recover but also surpass its previous peaks suggests that the pandemic acted as a powerful accelerant, permanently shifting a substantial portion of the population's health habits toward digital platforms. The market is not just returning to normalcy; it is fundamentally transforming and expanding, creating a fertile environment for innovation and new market entrants.

**Emerging Segments and Behavioral Trends**

The evolution of the fitness app market is also defined by a change in user preferences and a shift in the most lucrative market segments. While traditional "Exercise & weight loss" programs held the largest revenue share at 59.68% in 2024 1, a more granular analysis reveals a telling trend: the "Activity Tracking" segment is registering the fastest growth.1 This indicates a subtle but profound change in what users expect from a fitness application. The emphasis is moving from highly-structured, regimented workout plans to a broader, more integrated approach to daily movement and overall wellness. The growth of apps that encourage and track outdoor activities, such as Strava, OnX Hunt, Runna, and AllTrails, further reinforces this trend.2 Users are seeking platforms that support and celebrate their entire, active lifestyle, not just their formal workout sessions.

An even more compelling development is the rise of fitness apps that leverage psychological motivators beyond the simple achievement of health goals. Reward-based applications, which incentivize users to stay active by converting their steps into tangible rewards, are gaining significant traction. Apps like Sweatcoin, CashWalk, and WeWard have seen a rapid acquisition of new users and, crucially, are demonstrating high levels of user retention.2 For example, CashWalk and Sweatcoin maintain impressive 30-day retention rates of 31% and 20%, respectively.2 This success highlights a powerful behavioral principle: providing a transactional, gamified reward for daily habits can be a highly effective method for overcoming the common user-churn problem in the fitness industry. The core takeaway from these trends is that a successful fitness platform must provide a holistic, integrated experience that not only tracks progress but also makes the journey itself more engaging, motivating, and rewarding.

**Core Competitor Analysis: A Deep Dive into Leading Apps**

**Competitive Feature Matrix**

This matrix provides a high-level, comparative overview of the core strengths, business models, and strategic positions of the leading fitness apps analyzed in this report.

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| --- | --- | --- | --- | --- | --- |
| Workout App | Business Model | Core Workout Focus | Personalization Capabilities | Community Features | Key Differentiator |
| **Nike Training Club** | Freemium (Ecosystem-First) | Strength, HIIT, Cardio, Yoga | Limited (broad categories) | Brand-centric; integration with NRC | The power of a global brand and a seamless, free experience. |
| **FitOn** | Freemium | Cardio, HIIT, Barre, Pilates, Yoga | Personalized plans, meal plans (PRO) | Live leaderboards, challenges, real-time messaging | Unlimited variety and celebrity trainers for free. |
| **SWEAT** | Subscription-Only | Strength, HIIT, Pilates, Pre-/Post-natal | Goal-based programs, exercise substitutions | Niche community for women, "sweaty selfies" | Community as the core product and driver of user commitment. |
| **LazyFit** | Freemium (Soft Paywall) | Low-impact, Chair/Bed workouts | Hyper-personalization via extensive onboarding | Not a primary feature | Meticulous onboarding that creates a bespoke plan and builds trust. |
| **Home Workout - No Equipment** | Ad-Supported (Free) | Bodyweight-only, no equipment | Limited (30-day challenges) | Minimal | Frictionless, zero-cost entry point for beginners. |

**1. Nike Training Club (NTC): The Power of Brand and Freemium**

Nike Training Club is a masterclass in a brand-driven, ecosystem-first strategy. Its primary value proposition is simple and highly compelling: it is a high-quality, free-of-charge fitness tool that offers over 190 workouts and training plans for strength, endurance, yoga, and mobility.14 This content is led by a roster of world-class Nike Master Trainers, athletes, and wellness experts, with a polished, ad-free interface that is lauded by users for being top-notch and a "breeze" to navigate.3

However, the app's strengths also highlight its primary limitation. A review by Dr-Muscle notes that while the user interface and design are perfect, the workouts themselves are "quite generic" and lack a true "personal touch".3 The onboarding process simply places a user into one of three broad categories: beginner, intermediate, or advanced, which can leave a user feeling lost or resorting to "program hopping" in search of a better fit.3 This is not a failure of the app's design but a reflection of its strategic intent. The application is not primarily designed to be a personal trainer or a direct revenue driver. Instead, its purpose is to serve as a powerful customer acquisition and retention tool for the larger Nike brand. The app's value is in its ability to build brand loyalty and encourage users to become "Nike Members," which in turn drives digital product sales and overall engagement with the company's ecosystem.4 By providing such a high-quality, free resource, Nike creates a powerful psychological contract with the user, where the app’s value is paid not in dollars but in brand affinity and participation.

**2. FitOn: The Celebrity-Fueled Freemium Giant**

FitOn is a testament to the power of a freemium model built on a foundation of celebrity-led, high-variety content. The app is positioned as a "digital wellness platform" offering "the most premium content" and "unlimited variety" without requiring any equipment.17 It has successfully attracted a massive user base, with over 5 million downloads on the Google Play Store alone.5 This is achieved by offering a wide range of free workouts, including cardio, HIIT, strength, yoga, Pilates, and Barre, led by top celebrity trainers and even exclusive celebrity guests.13

The monetization strategy for FitOn is sophisticated and tiered. While a vast selection of workouts is available for free, a premium "PRO" subscription tier unlocks additional, high-value features. These include personalized meal plans, premium music from top artists, unlimited offline downloads, and real-time heart rate monitoring by connecting to devices like Fitbit and Garmin.6 The app also incorporates powerful community features, such as live leaderboards and the ability to share progress and communicate with friends.13 The strategic logic behind this model is to remove all friction for new user acquisition by offering an incredibly compelling, high-quality free experience. Once users are deeply engaged and recognize the app's value, the premium features are presented as a logical and worthwhile upgrade to accelerate their fitness journey and justify the recurring cost of a subscription, typically around $29.99 per year.18

**3. SWEAT: Building a Global Community and a Niche Empire**

SWEAT has carved out a distinct and highly successful niche in the fitness app market by positioning itself as a personal training platform "for women" with a powerful global community.8 Its strategic core is not its content alone but the deep sense of belonging and accountability it fosters. The app offers a broad suite of challenging programs, from standard HIIT and strength training to highly specific pre- and post-pregnancy workouts, led by co-founder Kayla Itsines and other world-class trainers.8

The business model is a direct-to-consumer, subscription-only approach, with a monthly or yearly fee and a free trial period to attract new members.7 The app’s success with this premium model is particularly notable because it leverages its community as a primary driver of retention. Users are encouraged to share "sweaty selfies" and engage in virtual challenges, creating a supportive environment where like-minded women can motivate each other.7 The monetary investment itself creates a psychological contract, encouraging users to remain committed to their fitness journey. User reviews consistently praise the app for its user-friendly interface, comprehensive features, and the powerful sense of community, noting that the investment is "worth it" due to the tangible results and the emotional support provided.8 This demonstrates that for a specific, well-defined audience, building a platform centered on social connection and shared experience can be more valuable than offering a simple, ad-supported service.

**4. LazyFit (Chair Workout): The Blueprint for Hyper-Personalization**

LazyFit, known for its focus on low-impact workouts and chair yoga, provides a compelling case study in the power of hyper-personalization and psychological onboarding. The app's value proposition is its ability to cater to an underserved market, including seniors and those with physical limitations, by offering "scientifically designed" and "customized" support for unique body needs.22

The application’s user interface and design are meticulously crafted, particularly its onboarding funnel. Instead of a simple one-click signup, LazyFit guides the user through an extensive, approximately 30-step journey that gathers crucial data on their core motivations, body type, lifestyle, and pain points.9 This process is not overwhelming because it is a gamified, psychologically reassuring experience with progress bars and checkmarks that provide a continuous sense of accomplishment. The payoff is visible at the end of the funnel, where the app generates a personalized fitness plan and a predictive weight loss graph, turning an abstract goal into a tangible, time-bound target.9 This is a strategic "value-first" approach that builds immense user trust before presenting a "soft paywall." The user is asked to subscribe only after they have seen the bespoke, high-value product that their data has created.9 This model is a powerful demonstration of how a deep, trust-building onboarding process can serve as a primary conversion and retention mechanism, proving that a user will invest their time and money when they feel genuinely understood.

**5. Home Workout - No Equipment: The No-Barrier-to-Entry Contender**

Home Workout - No Equipment represents the most fundamental strategic position in the fitness app market. Its value proposition is its absolute simplicity and its removal of every conceivable barrier to entry. The app provides daily workout routines that are 100% bodyweight-based, require no equipment, and are completely free.10 Its core functionality includes a progress tracker, BMI calculator, and clear animation and video guides for every move.10

The app’s monetization strategy is simple and direct: it relies on advertisements to generate revenue.11 While this model is effective at attracting a high volume of users with its zero-cost proposition, it inherently limits the app's long-term potential for user retention and high-margin revenue. The presence of ads can be a point of friction, and the lack of deep personalization means that as a user becomes more advanced or requires more sophisticated guidance, they are likely to "graduate" to a more feature-rich, subscription-based application.11 This app serves a crucial role as a gateway, introducing millions to the concept of digital fitness. However, its strategic model is not designed for a high-value, long-term relationship with the user, making it more of a commodity in the broader market landscape.

**The Super-App Blueprint: A Vision for Market Leadership**

A strategic blueprint for a market-dominating fitness application must be more than a simple compilation of features. It must be a cohesive, synergistic fusion of the best-in-class elements identified in the competitive analysis, designed to address the modern user’s needs for personalization, community, and frictionless access. The "super-app" would be a single, holistic platform that seamlessly transitions a user from a no-cost, low-friction entry point to a deeply personalized, long-term fitness journey.

**Super-App Feature Blueprint**

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| --- | --- | --- |
| Feature Name | Strategic Rationale | Source App(s) |
| **AI-Driven Personalized Programs** | Dynamically adapts to user progress and feedback, providing a clear, long-term, and progressive plan that addresses the "one-size-fits-all" limitation of many apps. | LazyFit 9, Dr-Muscle 12 |
| **Comprehensive On-Demand Library** | Offers a vast selection of workouts led by celebrity trainers and domain experts, catering to a wide range of interests and goals. | FitOn 13, SWEAT 8, Nike Training Club 14 |
| **Gamified Reward System** | Incentivizes daily activity and long-term consistency by converting movement into a tangible, redeemable in-app currency. | Sweatcoin 2 |
| **Interactive Community Hub** | Fosters a powerful sense of belonging and accountability, transforming the app from a tool into a social, supportive lifestyle service. | SWEAT 8, FitOn 13 |
| **Holistic Wellness Modules** | Expands the app's value beyond exercise to include nutrition, meditation, and recovery, addressing the user's desire for a more integrated wellness platform. | SWEAT 8, FitOn 13, Nike Training Club 15 |
| **Intuitive & Ad-Free UI/UX** | Creates a seamless, enjoyable user journey that removes friction and builds brand trust. | Nike Training Club 3 |

**Monetization Tiering Model**

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| --- | --- | --- |
| Tier | Key Features | Strategic Goal |
| **Free** | Unlimited on-demand access to a rotating selection of workouts and a basic activity/calorie tracker. A limited library of trainer-led content. Access to the core community hub. | **User Acquisition & Initial Engagement.** Attract a massive, broad user base by offering compelling value at zero cost, serving as a powerful top-of-funnel tool. |
| **PRO** | Unlocks the full experience: AI-driven personalized plans, the entire library of celebrity-led content, all nutrition and meditation modules, offline downloads, and real-time heart rate monitoring. Full access to all challenges and exclusive community features. | **Retention & Monetization.** Convert engaged free users into high-value subscribers by providing a bespoke, comprehensive, and highly effective product that justifies a recurring fee. |

**1. Strategic Rationale: Combining Best-in-Class Features**

The proposed "super-app" is a strategic fusion of the most effective principles observed in the market. It will adopt the hyper-personalization model of LazyFit to build deep user trust and commitment from the outset, moving beyond the generic "one-size-fits-all" programs of apps like NTC.3 It will leverage the vast, on-demand content libraries of FitOn and SWEAT to provide a diversity of celebrity-led workouts that cater to every preference and fitness level.8 The app's long-term success will be guaranteed by a gamified, community-driven ecosystem inspired by SWEAT’s social core and the reward mechanics of apps like Sweatcoin.2 The core value proposition is to be the single, holistic platform that provides a truly personalized, engaging, and motivating fitness journey, seamlessly blending the best of personal training, content delivery, and community support.

**2. UI/UX & Onboarding: The Foundation of Engagement**

The user experience of the super-app begins with a meticulously crafted onboarding funnel. This process, inspired by LazyFit’s success, is not a simple checklist but a psychological journey designed to make the user feel truly understood and invested.9 The app would ask detailed questions not only about a user’s goals but also about their pain points, lifestyle, and emotional motivators. This data would be collected within a visually appealing and gamified interface, complete with progress bars and checkmarks that build a sense of accomplishment.9 Crucially, the app would visualize the payoff by presenting a personalized, predictive graph of the user's progress and a sneak peek of their custom plan

*before* they are asked to subscribe.9 The entire experience would be defined by a sleek, intuitive, and ad-free design, a principle borrowed from NTC, which would build brand trust from the very first interaction.3

**3. Content & Workout Engine: A Hybrid, Personalized Approach**

The heart of the super-app is a hybrid content and workout engine that combines dynamic personalization with on-demand variety. The core of the experience would be an AI-powered engine that uses the onboarding data to generate a long-term, progressive workout plan.12 This plan would dynamically adjust based on user feedback and logged progress, ensuring that the workouts always feel challenging but achievable. This would solve the "program hopping" problem that plagues apps with generic content.3 This personalized plan would be supplemented by a vast, on-demand library of workouts led by a diverse roster of celebrity trainers and domain experts.8 This dual approach would give users both the clear, long-term roadmap they need to achieve their goals and the flexibility to explore new workouts or trainers whenever they desire. The content would also extend beyond physical exercise, incorporating holistic wellness modules such as guided meditations, recovery sessions, and comprehensive nutrition and meal planning guides, creating a truly all-in-one wellness platform.8

**4. Community & Social Features: The Engine of Retention**

The most powerful driver of long-term retention is a strong sense of community and accountability. The super-app would integrate this as a core feature. It would implement a gamified reward system, inspired by the success of Sweatcoin and CashWalk, which would convert steps and completed workouts into a redeemable, in-app currency.2 This provides a tangible, transactional reward for consistency. The app would also host structured group-based challenges with live leaderboards, fostering friendly competition and collective motivation.7 A dedicated social hub would allow users to share progress, provide support to one another, and connect directly with their favorite trainers and wellness experts. This environment would transform the solitary experience of working out at home into a shared, supportive journey, creating a powerful network effect that keeps users engaged and committed.

**5. Monetization & Business Model: A Strategic Hybrid Freemium Strategy**

The proposed business model is a refined freemium strategy designed to balance massive user acquisition with high-value monetization. The free tier would serve as the ultimate user magnet, offering unlimited, on-demand access to a rotating selection of high-quality workouts from a diverse range of trainers.13 This tier would also include a basic activity and calorie tracker. The strategic goal of this tier is to provide so much value for free that a user feels compelled to download the app and begin their fitness journey, removing all financial friction. The premium "PRO" subscription would be the monetization engine. This tier would unlock the full "super-app" experience, including the AI-driven personalized plans, the entire celebrity trainer library, all nutrition and meditation content, offline downloads, and real-time heart rate monitoring. This tiered structure ensures that the core product is accessible to everyone, while the most effective features that justify a recurring subscription are monetized.

**Conclusion and Final Recommendations**

The fitness app market is no longer a nascent industry but a mature, multi-billion-dollar ecosystem defined by strategic innovation. The analysis reveals that the most successful players are not those with the most features but those with a clear, defensible strategy—whether it is a brand-centric ecosystem, a celebrity-driven freemium model, a powerful community, or a meticulous personalization funnel. The core trend is a move toward holistic wellness and the use of psychological drivers like gamification and personalization to build long-term user habits.

The strategic opportunity for a new market entrant lies in synthesizing these disparate successes into a single, cohesive platform. The recommended path forward is to develop a "super-app" that combines the hyper-personalization and trust-building onboarding of LazyFit, the content depth and celebrity appeal of FitOn and SWEAT, the community-centric retention of SWEAT, and the seamless user experience of Nike Training Club.

For an entity looking to capitalize on this opportunity, the following actionable recommendations are proposed:

1. **Prioritize the Onboarding Funnel:** The first phase of development should focus on building and meticulously testing the hyper-personalized, data-driven onboarding process. This funnel is the cornerstone of the entire value proposition and will be the key to justifying a premium subscription.9
2. **Develop the Dynamic AI Engine:** Concurrently, the core AI engine that generates and dynamically adjusts personalized workout plans must be built. This is the intellectual property that differentiates the app from a simple library of workout videos.12
3. **Launch with a Tiered Freemium Model:** A phased launch should introduce a compelling free tier to attract a broad user base, followed by the introduction of the premium "PRO" tier once initial user engagement and satisfaction are validated.
4. **Invest in Community from Day One:** While the product is being built, a parallel effort must be made to cultivate a founding community. Community is not a feature; it is the product, and it is the single most powerful driver of long-term user retention.7

The market is ready for a platform that takes the guesswork out of fitness and provides a truly personalized, supportive, and rewarding journey. A strategic fusion of the best elements of today's leading apps will not only meet this demand but will also establish a new standard for the industry.

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