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UK Health & Fitness **Market Report 2026**

The authoratative report on the UK health and fitness market, showing quarterly sector and consumer trends.

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Contents

01 **Foreword**
Page 04

02 **Introduction**
Page 06

03 **Defining the market and evidence base for this report**
Page 08

04 **UK health and fitness market overview (2025 data)**
Page 10

05 **M&A in the UK health and fitness market**
Page 26

06 **The trends that are shaping the sector**
Page 30

- 01. Market demand and participation dynamics — Page 32
- 02. Demographics, inclusion and motivations — Page 36
- 03. Health prevention, integration and changing demand — Page 46
- 04. Facility and proposition evolution — Page 48
- 05. Price and value — Page 50
- 06. Technology and data — Page 54

07 **Looking to the future: UK health and fitness in 2026**
Page 56

08 **About us**
Page 60

09 **Appendices**
Appendix A: Methodology and terminology
Page 62

10 **Contacts**
Page 72

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01. Foreword

Following the success of the inaugural report in 2025, we are delighted to bring you the second annual UK Health and Fitness Market Report, once again bringing together reliable data to offer a full and accurate view across the private, public and independent parts of the sector.

The production of this report is a sizeable undertaking, requiring extensive collaboration with members, partners and sponsors from across the sector, whose input and insight we are incredibly grateful for. Huge thanks also go to the teams at Grant Thornton UK, 4GLOBAL and Sport England, without whom the creation of this report would not have been possible.

This year, we have built on the solid foundation of the first report and added further metrics, gathering new data points to produce, for the first time, a sector-wide view of the attributable social value being delivered through health and fitness activities within facilities across the whole of the UK. It tells an inspirational story of the amazing value being delivered in facilities up and down the country for people from all walks of life, and the impact this sector has beyond its commercial performance.

The sector has seen another record year for growth despite an increasingly challenging operational landscape, in which cost challenges continue to put pressure not only on businesses, but also on consumers. However, in the face of these continued rising operating costs, the sector is adapting and capitalising on the opportunities that new trends and innovations create, such as the proliferation of GLP-1, adjusting offerings to reach new and emerging customer segments.

Further, it is reassuring to see the trend of consumers prioritising their health continues, with more people seeing the value in using their discretionary spend on memberships within the sector, thanks to the broad spectrum of services and facilities that the health and fitness market offers.

These are just two of the key drivers of the incredibly positive performance of the sector. This is good news for business, with deal activity reflecting a market finding its stride as consolidation, growth capital and international interest highlight the sector's enduring strength. This bodes well not only for investors, but the entire nation. The growth of this sector is intrinsically linked with the nation's chances of success in tackling stubborn health inequalities and increasing economic inactivity. The services provided are delivering preventative health, improving recovery from illness and injury, boosting productivity and keeping people in work. Growth in this sector begets growth across the nation, as well as reducing pressure on the NHS, saving on the cost of ill-health and improving the lives of people in every community.

There needs to be more recognition of this fact at all levels, from consumers to healthcare practitioners, all the way up to the top of Government. This report and the data within it will be fundamental in increasing awareness and informing evidence-based policy development and decision making.

The core mission within ukactive's Vision 2030 is to help the sector to engage more than 20% of the population by 2030, and we are well on the way to achieving that ambition, reaching a record level of 18% in 2025. There is still further to go to reach our goal, but I have confidence in the ability of this sector to not only achieve this mission, but surpass it in the years to come.

David Stalker
Chair of ukactive

Sport England is pleased to be working with ukactive, Grant Thornton and 4GLOBAL to publish the second annual UK Health and Fitness Report, building on the strong foundations established last year.

The findings in this report present a compelling picture of impact and for this, I extend my sincere thanks to the hundreds of partners involved. Their commitment and forward-thinking approach are helping the sector tell its story with confidence.

The data showcases a sector that continues to grow, adapt and demonstrate its value in an increasingly complex environment. Sustained rises in participation, alongside strong increases in membership, visits and income, reflect a health and fitness sector that is not only resilient but evolving to better meet the needs of local communities.

Growth in market penetration to 18.0% of the population is encouraging, as is the sector's ability to retain and engage members despite ongoing cost-of-living pressures. This speaks to the strength of its offer and its ability to demonstrate value to those who access it.

However, these positive trends must be viewed alongside an important reality: access to physical activity remains unequal. For many lower-income households, financial pressures continue to limit participation and more must be done to ensure opportunities to be active are truly accessible to all.

This is where the collective effort across public, private and independent operators becomes critical.

Each plays a distinct and valuable role in reaching different communities, widening access and supporting people to lead healthier lives.

At Sport England, our mission is to ensure that everyone, regardless of background, has the opportunity to be active. Reports such as this, alongside our Moving Communities service, are vital in helping us understand where progress is being made, where challenges remain, and how we can work together to address them.

The opportunities ahead are significant. The increasing integration between health and fitness and healthcare pathways has the potential to transform how we approach prevention, rehabilitation and the management of long-term conditions. As demand grows for services that support physical and mental wellbeing, the sector is well placed to play a central role, working alongside healthcare partners to deliver better outcomes for individuals and communities.

At the same time, emerging trends – from the rise of new technologies to changing consumer expectations and the growth of inclusive, place-based models – will continue to shape the sector's future. Navigating these changes successfully will require innovation and a continued, collaborative commitment to evidence-led practice.

My thanks also extend to the partners who contribute their data, as well as their passion and dedication. It is due to this collective commitment that we enter 2026 from a position of strength. By continuing to focus on widening access, strengthening partnerships and demonstrating value – economically, socially and in terms of health outcomes – the sector can play an even greater role as a cornerstone of active, healthy and connected communities.

Lisa Dodd-Mayne
Executive Director of Place at Sport England

02. Introduction

Now in its second year, the UK Health and Fitness Market Report continues the collaboration between ukactive, Sport England, 4GLOBAL and operators across the private, public and independent sectors, with analysis from Grant Thornton UK Advisory & Tax LLP.

Last year's inaugural publication filled a longstanding gap by bringing together the most authoritative dataset the industry had ever assembled to provide a unified view of sector performance. Commissioned again by ukactive, this year builds on that foundation, offering a picture of how the sector is evolving. By consolidating data from private, public and independent operators, once again, the report delivers an accurate account of market performance to inform strategic decision-making for operators, policymakers and investors.

The data powering this report has unrivalled coverage across the sector. Core inputs include ukactive's Private Sector Benchmarking project (private operator metrics), data from three leading Leisure Management Systems (independent operator metrics), and 4GLOBAL's DataHub the underlying platform for Sport England's Moving Communities dataset (public operator metrics).

This is supported by Sport England's Active Places Power platform which provides the foundation for site-based analysis. Together this delivers sample coverage of 74% of private operators, 88% of independents and 85% of public operators, providing a high level of market coverage from which data could be extrapolated to cover the UK as a whole[1].

Operator datasets are complemented by ukactive's Consumer Engagement Survey, which offers detailed insights into member and non-member behaviours, preferences and trends. This is paired with extensive stakeholder engagement, including one-to-one interviews with operators, suppliers, analysts, public-sector bodies and subject-matter experts, alongside a structured written survey to ensure consistent coverage of emerging themes.

Taken together, these sources provide access to an unprecedented depth of operator and consumer insight. This year's analysis points to a resilient and growing market, characterised by strong performance metrics and increasingly diversified offers that align with evolving consumer expectations and trends.

1. Please see Appendix A for further methodology details.

Our roles and responsibilities

ukactive – More people, More active, More often	Commissioned the report and provided Consumer Engagement Data.
Sport England	Provided amalgamated health and fitness membership data from public leisure facilities using the Moving Communities service. Sport England's Active Places Power platform supports site-based analysis.
4GLOBAL	Provided all sector data as the data intelligence partner of Sport England's Moving Communities and ukactive's Private Sector Benchmarking projects.
Grant Thornton – Grant Thornton UK Advisory & Tax LLP	Provided M&A data, undertook stakeholder engagement, analysis and interpretation of all data and report writing support.

03. Defining the market and evidence base for this report

This report brings together complementary data sources to provide insights into the UK health and fitness market.

For the purpose of this report, the health and fitness market refers specifically to the UK's gym and leisure centre sector, alongside UK consumer fitness and physical activity trends.

The analysis covers the network of facility-based fitness operators across the UK[2], encompassing private multi-site operators (referred to as 'private operators'), independent commercial operators, with up to three sites ('independent operators') and 'public operators' which are local authority owned[3,4].

By consolidating data from these segments for a second consecutive year, the report delivers a consistent and comprehensive view of market performance and integrates:

a. **Operator data** across private, independent and public providers[5].

b. **Mergers and acquisitions (M&A) activity** in the UK health and fitness market in 2025.

c. **Consumer survey data** from ukactive's quarterly consumer survey programme run by Savanta. This was an online consumer survey conducted across four waves, each delivered in a different quarter of the year (January, April, July and September)[6].

These insights offer a strong basis for understanding key trends and, when considered alongside other relevant data and analysis, support comprehensive decision-making.

d. **Market-expert insight** gathered between January and February 2026 through structured stakeholder engagement from 32 individuals. This included a wide range of one-to-one interviews with operators, suppliers, analysts, public-sector bodies and subject-matter experts – with discussions focused on performance and developments during 2025 – supplemented by a structured written survey issued to an even wider group of stakeholders.

e. **Desktop research and literature review** to contextualise findings.

Taken together, these data sources provide a rich, triangulated evidence base, enabling nuanced insight, the testing of emerging themes and representation of the diversity of the market.

It should be noted that the wider health and fitness ecosystem extends beyond operators and includes equipment and apparel suppliers, digital fitness and technology providers, outdoor fitness organisations, studios, intermediaries, and more which are not covered in this report. However, growth within the operator sector acts as a key engine for this broader ecosystem, creating opportunities across supply chains and multiple connected markets.

Further methodological detail is provided in Appendix A including terminology definitions.

2. Fully operational sites in the UK that include at least a health and fitness gym equipped with resistance and/or cardiovascular equipment. The site must be accessible to the public through membership and/or pay-as-you-go options. This definition excludes facilities such as schools, outdoor gyms, yoga or Pilates studios, studio-only sites and swimming-pool-only venues. It also excludes education facilities such as university gyms that may be open to the public only for very limited periods of the day.
3. Detailed terminology definitions can be found in Appendix A.
4. The analysis focuses on this segment of the market because robust operator data was available to ukactive, unlike in other areas of the health and fitness sector.
5. Please note all quarterly references reflect the calendar year, with Q1 beginning in January.
6. Detailed survey methodology and sample size can be found in Appendix A.

04. UK health and fitness market overview

Key Stats 2023–2025[7]

5,842

Number of clubs[8] | **2024: 5,607** +4.2%

18.0%

Total penetration rate[9] | **2024: 16.9%** +1.1ppt

679m

Visits (throughput) | **2024: 616m** +10.3%

£6,497m

Total income | **2024: £5,686m** +14.3%

£5,701m

Total membership income[10] | **2024: £4,991m** +14.2%

£7.46bn

Social value

12,242,443

Number of gym or leisure facility members | **2024: 11,486,680** +6.6%

Source: 4GLOBAL, Grant Thornton analysis.

7. Please note that as detailed in Appendix A, membership numbers are taken as a snapshot from Q4, whilst total income and total throughput are measured across the full year. As such any interplay between these numbers and their growth needs to be interpreted with care.
8. Fully operational sites in the UK that include at least a health and fitness gym equipped with resistance and/or cardiovascular equipment. The site must be accessible to the public through membership and/or pay-as-you-go options. This definition excludes facilities such as schools, outdoor gyms, yoga or Pilates studios, studio-only sites and swimming-pool-only venues. It also excludes education facilities such as university gyms that may be open to the public only for very limited periods of the day.
9. Penetration rate is calculated as total memberships divided by total UK population (United Nations population figures).
10. Note: Due to new data some historic figures have been updated; as a result, they may differ slightly from figures in last year's report.

Operator analysis

Across multiple metrics, the UK health and fitness market continued to deliver strong growth in 2025. Over the past three years, market penetration has risen from 16.0% of the population in 2023 to 18.0% in 2025, the highest level recorded to date.

Across the sector, memberships increased, visits rose and income grew strongly. Membership income increased from £4.54 billion in 2023 to £5.70 billion in 2025, equivalent to a 12.0% compound annual growth rate while total memberships grew from 10.8 million to 12.2 million (13.1%) over the same period. This growth also illustrates a steady increase in membership income per member with each member generating an average of £466 per year (£38.81 per month) in 2025, up 7.2% from £435 in 2024 and 11.0% from £420 in 2023, showing that the typical member now contributes more income than in previous years – helped by stronger value propositions, tiered products and continued upgrades across facilities.

Notably, membership and income uplift has persisted despite ongoing consumer cost-of-living pressures which shows the sector's ability to communicate and deliver value in a financially constrained environment. However, it is important to acknowledge that not all consumers are in a position to make these choices. Increases in the cost of living, characterised by inflation on essential goods, weak real spending growth and a continued squeeze on discretionary expenditure[10], have been felt most acutely by lower-income households, who typically experience higher effective inflation because essentials represent a larger share of overall expenditure. As such, while the market shows strong resilience among existing customers, this should not obscure the financial pressures limiting access or participation for others.

Against this backdrop, the affordability of discretionary expenditure such as fitness memberships has become an increasingly important factor in consumer decision-making, reinforcing the role of the high value low cost (HVLC) model as a major driver of private-sector market penetration over the past decade.

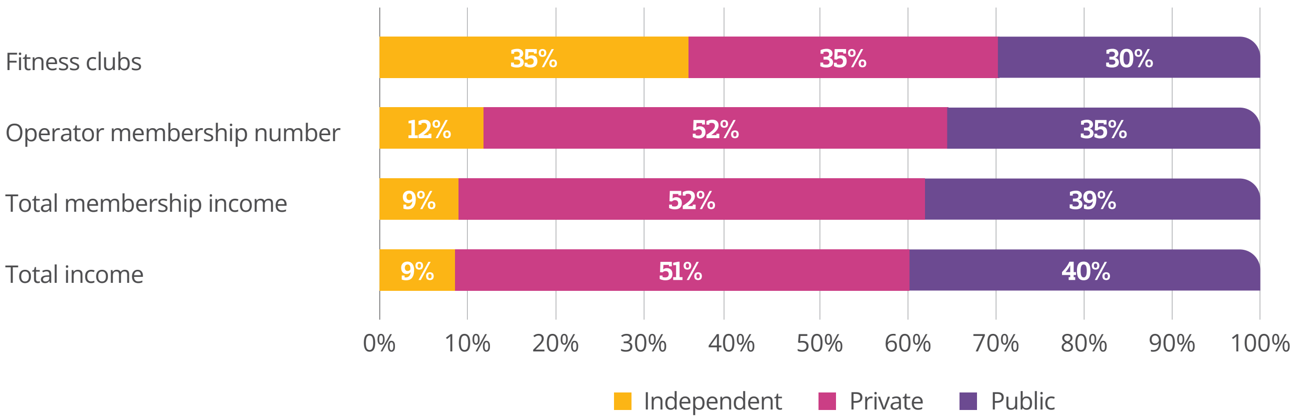
2025 saw total members served by the sector rise by 6.6%, a figure driven by a growing member base for private and public operators (up 7.8% and 7.4% from 2024 figures, respectively), underlining their importance in delivering accessible physical activity to a broad population.

2025 saw total throughput increase by 10.3% compared to 2024, meaning sites are being used more frequently. It should be noted that this uptick in utilisation can bring its own challenges related to over-capacity, including crowding at peak times, waitlists for popular activities and, in some cases, capped membership sales at high-demand sites.

While more people are joining gyms and leisure centres, the story is increasingly about how members use facilities, how often they visit and how operators generate income, rather than simply how many clubs the sector has.

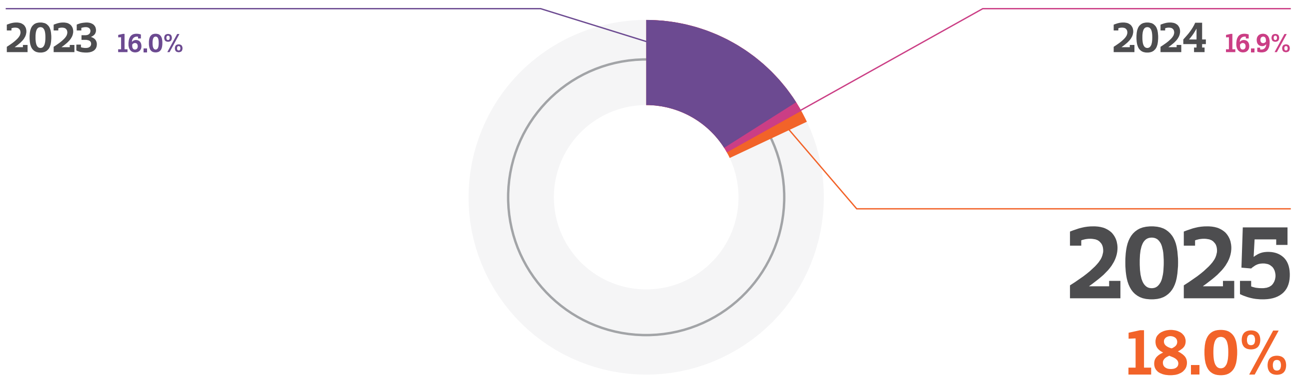
10. ONS household spending data across this period shows that while nominal spending rose, the real volume of discretionary purchases declined, with household spending increasing by only 0.9% year-on-year into early 2025. Essentials such as food, energy and housing drove much of the limited spending growth, while discretionary categories fell by 0.6% in Q1 2025.

Figure 1: Breakdown of UK total income, membership numbers and club share by operator type (2025)



Source: 4GLOBAL, Grant Thornton analysis.

Figure 2: UK fitness market – three–year penetration rates*



Source: 4GLOBAL, Grant Thornton analysis.

Over the past three years, market penetration has risen from 16.0% of the population in 2023 to 18.0% in 2025, the highest level recorded to date. This milestone reflects the continuation of a three-year upward trajectory (16.0% in 2023, 16.9% in 2024 and 18.0% in 2025), showing sustained strengthening of the market's reach and relevance. Several factors appear to be driving this growth:

- Strong membership growth, boosted by expanding estates and improved customer propositions.
- Throughput growth suggesting more frequent usage and perceived value.
- Continued investment in public facilities, including broader activity programmes and more flexible access routes, which help reach audiences less likely to purchase traditional memberships.
- Consumer prioritisation, even in the face of cost-of-living pressures, indicating a resilient willingness to allocate household budgets toward physical activity.
- A diversified market offer, spanning premium gyms, budget clubs, independents and public facilities – providing entry points for a wide spectrum of consumers.

Collectively, these dynamics have driven participation to its highest-ever penetration rate, demonstrating both the sector's adaptability and the increasing importance placed on fitness and activity by UK consumers.

Note: *Penetration rate is calculated as total memberships divided by total UK population[11].

11. United Nations population figures, detailed methodology details can be found in Appendix A.

Figure 3: Private operators at a glance

Metric[12]	2023	2024	2025	Difference between 2024–2025 data
Number of clubs	1,838	1,899	2,051	8.0%
Members (million)	5.75	5.96	6.42	7.8%
Member income (£ million)	2,329	2,587	2,950	14.0%
Total income (£ million)	2,709	2,981	3,341	12.1%
Total throughput (million)	371	398	450	12.8%
Average members per club	3,131	3,137	3,130	-0.2%
Average annual member income per club (£ million)	1.27	1.36	1.44	5.6%
Average annual member income per member (£)	404.75	434.30	459.55	5.8%
Average annual total income per member (£)	470.77	500.31	520.42	4.0%

Source: 4GLOBAL, Grant Thornton analysis.

Private operators remain the largest part of the market and continue to expand their estates. Private operators account for over half of total membership income (51.8% in 2024 and 51.7% in 2025) and serve just over half of all UK members (51.9% in 2024 and 52.4% 2025). Between 2024 and 2025, they added 8.0% more clubs accompanied by a similar rise in membership (7.8%). Membership growth is strong, showing an increase on the previous year's growth rate (7.8% versus 3.5%) despite some operators opening smaller footprint clubs that may not have the same membership capacity as larger footprint clubs.

Private operators also recorded an increase in throughput rising by 12.8% between 2024 and 2025, compared with 7.5% growth in the previous year. This acceleration suggests that members are deriving greater value from their memberships and engaging more frequently with services throughout the year.

Private sector income also rose strongly, increasing by 12.1% (up from 10.0% growth the year before), driven not only by growth in membership but also by a 4.0% increase in total income per member compared to 2024.

Growth within the private segment is underpinned by a diversifying set of operating models. At the low-cost end, flexible high value low cost (HVLC) chains continue to expand, capitalising on rising demand from increasingly price-sensitive consumers. At the premium end, operators are broadening and strengthening their propositions in response to a growing appetite for holistic wellbeing experiences. This includes enhanced amenity bundles such as sauna and recovery facilities, high-quality social spaces, and work-from-gym options that support more integrated lifestyles. Mid-market operators, meanwhile, have focused on elevating their value proposition, aiming to meet the needs of consumers who are reassessing the relative value of fitness and seeking offers that balance affordability with experience, breadth of service and overall quality.

12. Please note that as detailed in Appendix A, membership numbers are taken as a snapshot from Q4, whilst total income and total throughput are measured across the full year. As such any interplay between these numbers and their growth needs to be interpreted with care.

Figure 4: Public operators at a glance

Metric[13]	2023	2024	2025	Difference between 2024–2025 data
Number of clubs	1,706	1,704	1,741	2.2%
Members (million)	3.74	4.05	4.34	7.4%
Member income (£ million)	1,797	1,943	2,229	14.7%
Total income (£ million)	2,056	2,201	2,592	17.8%
Total throughput (million)	146	162	167	3.1%
Average members per club	2,191	2,374	2,495	5.1%
Average annual member income per club (£ million)	1.05	1.14	1.28	12.3%
Average annual member income per member (£)	480.61	480.21	513.26	6.9%
Average annual total income per member (£)	549.79	543.94	596.80	9.7%

Source: 4GLOBAL, Grant Thornton analysis.

Public operators delivered 7.4% membership growth between 2024 and 2025, data sources, including market-expert insights, suggest this may be driven in part by strong community demand, swimming provision, concessions and targeted health and wellbeing programmes. They are the only operator segment to grow the number of members per club (+5.1% from 2024), suggesting they continue to fill their capacity. Total throughput growth in the public sector was comparatively modest at 3.1%, lower than both the increases seen in the private and independent segments and the 11.1% growth recorded between 2023 and 2024, suggesting more infrequent and casual users.

The throughput data captures only the health and fitness activities whilst memberships are those with health and fitness access but may also include other activities such as swimming, therefore any participation in non-health and fitness activities will not be counted in the throughput data. It is also worth noting that membership change is a year-on-year comparison at Q4 whilst throughput is cumulative throughout the year and may be impacted by within year fluctuations.

Public operators grew membership income and total income by the largest percentage of any sector when compared to 2024 (14.7% and 17.8%, respectively).

Source: 4GLOBAL, Grant Thornton analysis.

13. Please note that as detailed in Appendix A, membership numbers are taken as a snapshot from Q4, whilst total income and total throughput are measured across the full year. As such, any interplay between these numbers and their growth needs to be interpreted with care.

This strong financial performance reflects not only the increase in membership numbers but also a 9.7% uplift in annual total income per member, indicating greater value generated from each customer throughout the year. There is also some indication that newer public sector openings are coming through with smaller health and fitness footprints, which may further moderate throughput growth relative to membership growth.

It is likely that this uplift is driven by a combination of factors. On one hand, public operators, like all operators, have faced rising operational costs, including increases in National Insurance and wider inflationary pressures, which have required price adjustments to maintain service delivery.

On the other hand, the public model continues to offer memberships that combine gym and fitness with other activities such as swimming, in addition to flexible, accessible pay-as-you-go options and non-membership gym and studio-based activities, which broaden participation and naturally increase income per member without signalling a shift toward premiumisation.

Notably, public operators continue to generate the largest proportion of non-membership income per member, this can be attributed to the breadth of services they provide to their communities beyond memberships such as, bookable programmes and more flexible gym and studio-based activities. This flexible offer plays an important role in supporting inclusive access and the overall commercial resilience of public leisure facilities.

Figure 5: Independent operators at a glance

Metric[13]	2023	2024	2025	Difference between 2024–2025 data
Number of clubs	2,011	2,004	2,051	2.3%
Members (million)	1.33	1.48	1.48	-0.3%
Member income (£ million)	415	461	522	13.1%
Total income (£ million)	459	505	564	11.8%
Total throughput (million)	53	55	63	13.1%
Average members per club	660	740	722	-2.5%
Average annual member income per club (£ million)	0.21	0.23	0.25	10.6%
Average annual member income per member (£)	312.60	310.96	352.68	13.4%
Average annual total income per member (£)	345.70	340.12	381.17	12.1%

Source: 4GLOBAL, Grant Thornton analysis.

Independent operators saw a modest increase in site numbers in 2025, rising by 2.3% compared with 2024 and returning to levels above those recorded in 2023 after a dip the previous year. However, because overall membership remained broadly flat (-0.3%), the average number of members per club fell slightly from 2024.

Despite this, total throughput increased by 13.1%, indicating that existing members are visiting more frequently and that facilities are being used more intensively. This also reflects the year-on-year comparison of memberships for Q4, whilst throughput reflects the cumulative participation across 2025. Membership income also grew by 13.1% (almost matching that of the private sector), reflecting stronger pricing, deeper engagement, and the continued strength of independent operators' community-based models.

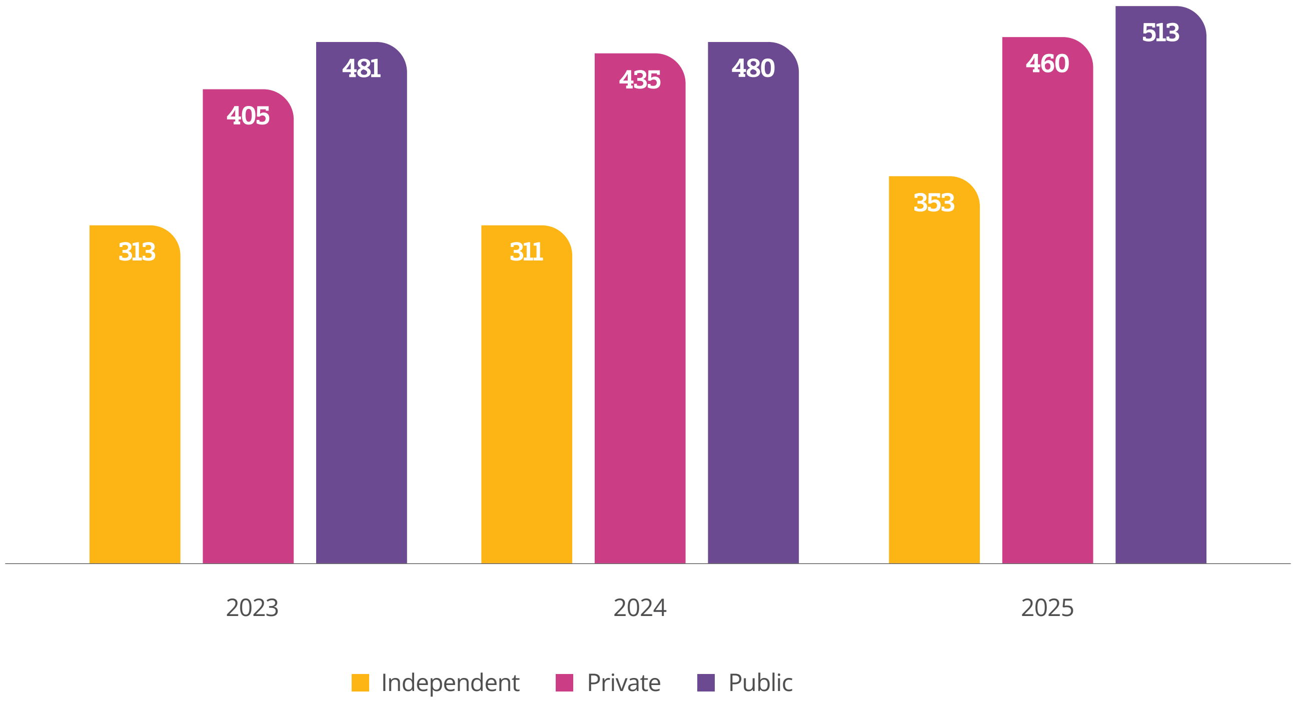
While their total income did not rise as rapidly as the public sector (11.8% versus 17.8%), it was only slightly under the growth pace of private operators (12.1%).

This performance in underpinned by independents recording the largest increase in membership income per member between 2024 and 2025 (13.4%), demonstrating their ability to drive value even without substantial membership expansion (-0.3%)[15].

It is worth noting that this increase in pricing primarily seems to be a response to operational challenges from rising cost pressures, rather than a shift toward premium positioning – independent operators' average membership income per member remains below that of both private and public sector providers sitting at £353 for 2025.

14. Please note that as detailed in Appendix A, membership numbers are taken as a snapshot from Q4, whilst total income and total throughput are measured across the full year. As such, any interplay between these numbers and their growth needs to be interpreted with care.
15. Please note that as detailed in Appendix A, membership numbers are taken as a snapshot from Q4, whilst total income and total throughput are measured across the full year. As such, any interplay between these numbers and their growth needs to be interpreted with care.

Figure 6: Average annual membership income per member by operator type since 2023 (£)



Source: 4GLOBAL, Grant Thornton analysis.

In-year membership levels

In-year membership levels remained broadly stable across all operator segments, with only modest fluctuations, that point to a relatively steady demand environment. Quarterly movements for each operator type ranged from -3.4% to +2.7% which is consistent with variation seen in the previous year (-1.6% to +5.0%).

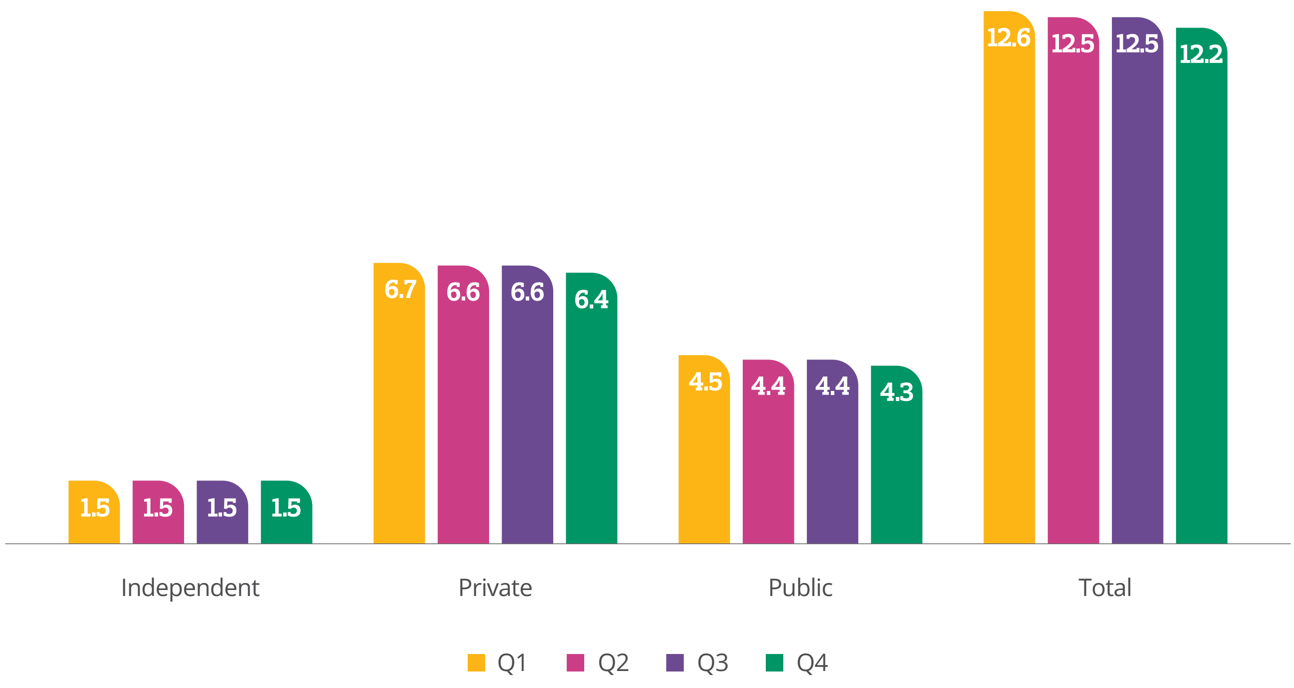
Total market membership decreased slightly quarter-on-quarter, falling from 12.6 million in Q1 to 12.2 million in Q4[16]. While this represents a marginal softening of approximately 3%, the overall trend suggests the sector retained the majority of its member base throughout the year.

The private sector continued to account for the largest proportion of total membership. Numbers were highest in Q1 at 6.7 million, followed by a small but progressive decline to 6.4 million by Q4. Despite this, the private sector remains the anchor of market volume. The public sector showed a similar pattern, with membership decreasing from 4.5 million in Q1 to 4.3 million in Q4. Nonetheless, the public segment maintains a substantial share of total membership and continues to demonstrate resilience.

The independent sector remained the smallest segment and consistently recorded 1.5 million members across all four quarters. Notably, it was the only operator group in which Q3 membership levels exceeded those in Q1, reflecting a comparatively strong mid-year performance. This stability, combined with steady quarterly volumes, indicates strong retention and a resilient core customer base within the independent sector.

These patterns indicate a market characterised by stability rather than volatility. Membership levels across all segments experienced only marginal changes, suggesting that underlying demand for fitness and activity services remained steady despite evolving market conditions. The overall decrease of -2.9% may reflect cost-of-living considerations, adjustments in discretionary spending, or an amount of seasonal variation. Importantly, Q4 membership reached 12.2 million remaining well above the previous year's peak of 11.6 million, recorded at the start of 2024. This highlights the sector's continued year-on-year growth.

Figure 7: 2025 membership numbers from Q1 to Q4 (million)



Source: 4GLOBAL, Grant Thornton analysis.

16. Please note all quarterly references reflect the calendar year, with Q1 beginning in January.

Together, the Private, Public and Independent segments generated £7.46 billion in attributable social value.

Social value analysis

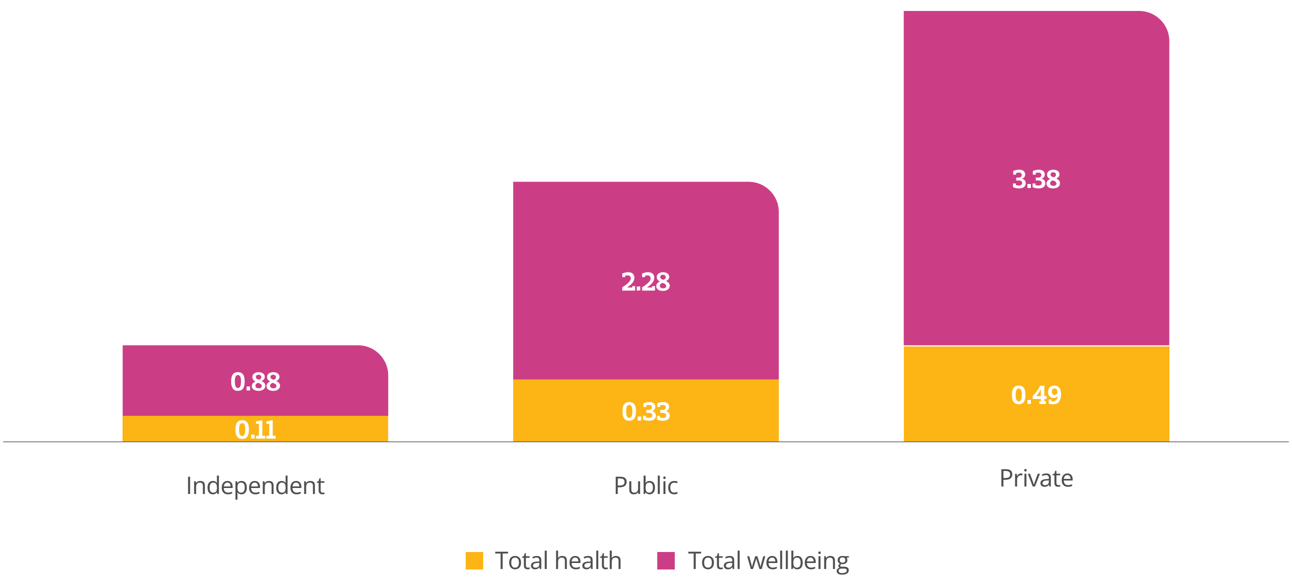
This section provides an assessment of the social value generated across the Private, Public, and Independent operator facility-based fitness sectors for the 2025 calendar year. Social value is the positive economic, social and environmental benefits that are generated for individuals and communities. Together, the Private, Public and Independent segments generated £7.46 billion in attributable social value, reflecting the significant contribution of the facility-based fitness sector to national health and wellbeing outcomes.

Private multi-club operators delivered the largest share of total social value, accounting for 52% of the sector-wide total. Public operators contributed 35%, with independent operators generating the remaining 13%.

The private operator sector generated an estimated £3.86 billion in attributable social value in 2025. Public operators produced the second-largest contribution at £2.61 billion, while independent operators generated £989 million.

It is also important to recognise at the outset of this section that the public sector delivers a broader range of activity than is captured in this analysis. This report focuses on health and fitness activity, and therefore excludes areas such as swimming, sports halls and wider community programmes, which form a significant part of the public leisure offer and contribute to overall social value.

Figure 8: Health and fitness attributable Social Value (2025) (£b)

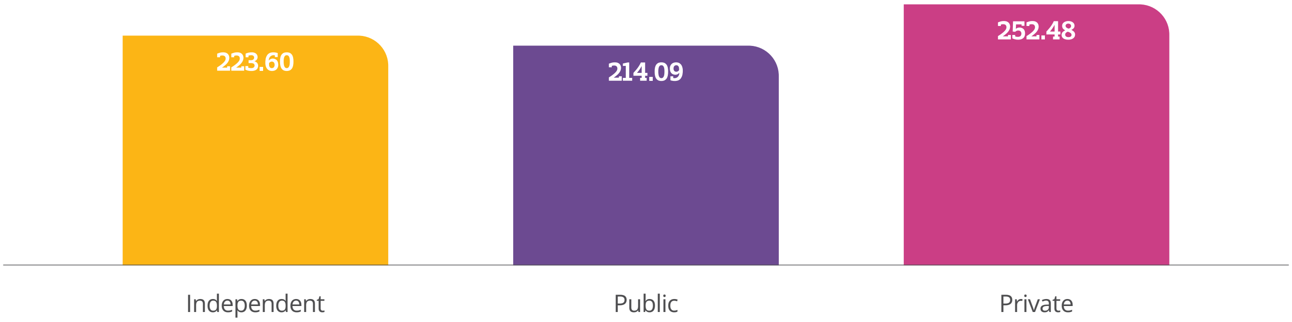


Source: 4GLOBAL, Grant Thornton analysis.

Across all sectors, individual wellbeing[17] as the primary outcomes dominates, accounting for approximately 88% of total social value.

17. Wellbeing outcomes represent the direct, immediate benefits to individuals' life satisfaction that arise from being physically active i.e. how physical activity improves people's quality of life.

Figure 9: **Average health and fitness social value per participant across each operator type (2025) (£)**



Source: 4GLOBAL, Grant Thornton analysis.

This aligns with the structure of the national social value model, whereby improvements in individual wellbeing represent the largest single component of monetised value, reflecting the significant improvement in life satisfaction associated with regular participation in physical activity.

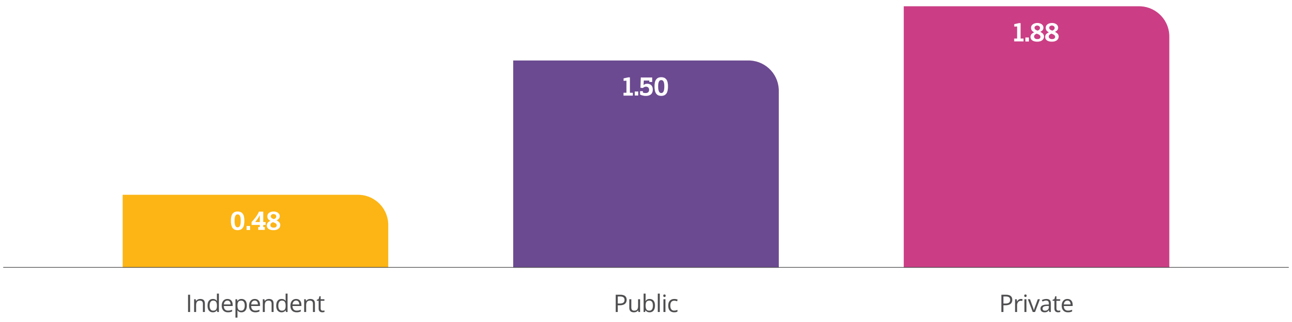
Average social value per participant provides the most meaningful comparison across operator types, as it isolates the value generated by an individual once they are engaged. On this basis, the private sector delivers the highest value per participant (£252.48), followed by independent operators (£223.60) and public operators (£214.09). While there is some variation, the overall range remains relatively narrow (just under £40), indicating that once individuals reach sufficient levels of activity, the social value generated is broadly consistent across the sector.

The primary driver of these differences is the proportion of users reaching the activity thresholds required to generate social value. Social value is only attributed to individuals classified as "active" or "fairly active", based on whether they meet defined monthly activity thresholds, making the active ratio a critical determinant of performance.

The private sector records the highest active ratio (68%), which translates into stronger per-participant outcomes. Independent operators follow with a 63% active ratio, while the public sector records a lower figure (56%), reflecting a broader and more diverse user base that includes a higher proportion of low-frequency participants. As a result, differences in social value per participant are less about the intrinsic effectiveness of facilities and more about how frequently and consistently users engage.

It is also important to note the earlier point that the public sector delivers a broader range of activity than is captured in this analysis. For example, the social value per participant in the public sector when all activity types are included is c.£242[18].

Figure 10: **Average health and fitness social value per club across each operator type (2025) (£m)**



Source: 4GLOBAL, Grant Thornton analysis.

18. Moving Communities Facilities Impact Report, March 2025.

A complementary perspective is provided by analysing **social value per club,** which reflects the combined impact of participation levels and engagement within each site. On this basis, the private sector generates the highest social value per club (£1.88m), followed by the public sector (£1.50m), with independent operators significantly lower (£0.48m).

This variation is primarily driven by differences in members per club and engagement intensity. Private and public operators serve substantially higher numbers of members per site, creating a larger base of participants who can generate social value. In addition, stronger engagement levels, particularly in the private sector, which records the highest active ratio, further amplify value generation. By contrast, independent operators typically operate with smaller member bases per club, which constrains total social value at site level despite relatively solid engagement rates. As such, social value per club is largely a function of scale and usage, rather than differences in the value generated by individuals themselves.

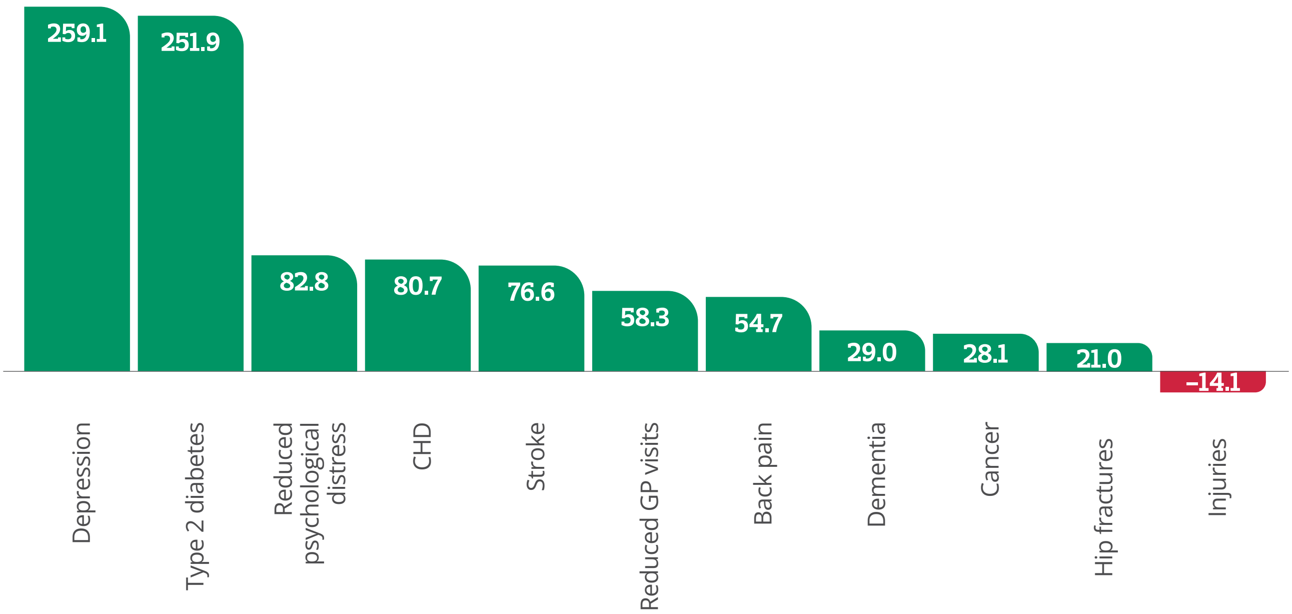
Health-related social value

Although wellbeing dominates, health-related[19] outcomes contribute meaningfully across all sectors. Health-related value is driven by risk reductions across a wide range of conditions.

The largest contributors accounting for 81% of health social value are:

- Depression risk reduction.
- Type 2 diabetes.
- Reduced psychological distress.
- CHD risk reduction.
- Stroke risk reduction.

Figure 11: Health-related facility-based fitness social value breakdown (£m)



Source: 4GLOBAL, Grant Thornton analysis.

The proportional contribution of each of these outcome areas is remarkably consistent across the private, independent and public sectors, indicating that the pattern of health impact is broadly similar regardless of operator type.

19. Health outcomes represent the indirect, longer-term benefits to society and the healthcare system that arise from reduced risk of disease and reduced service usage i.e. the avoided costs and disease-risk reduction associated with being active.

05. M&A in the UK health and fitness market

Fit for Growth – How Investors Reshaped the Market in 2025

Deal activity in 2025 reflected a market finding its stride, with consolidation, growth capital and international interest highlighting the sector's enduring strength.

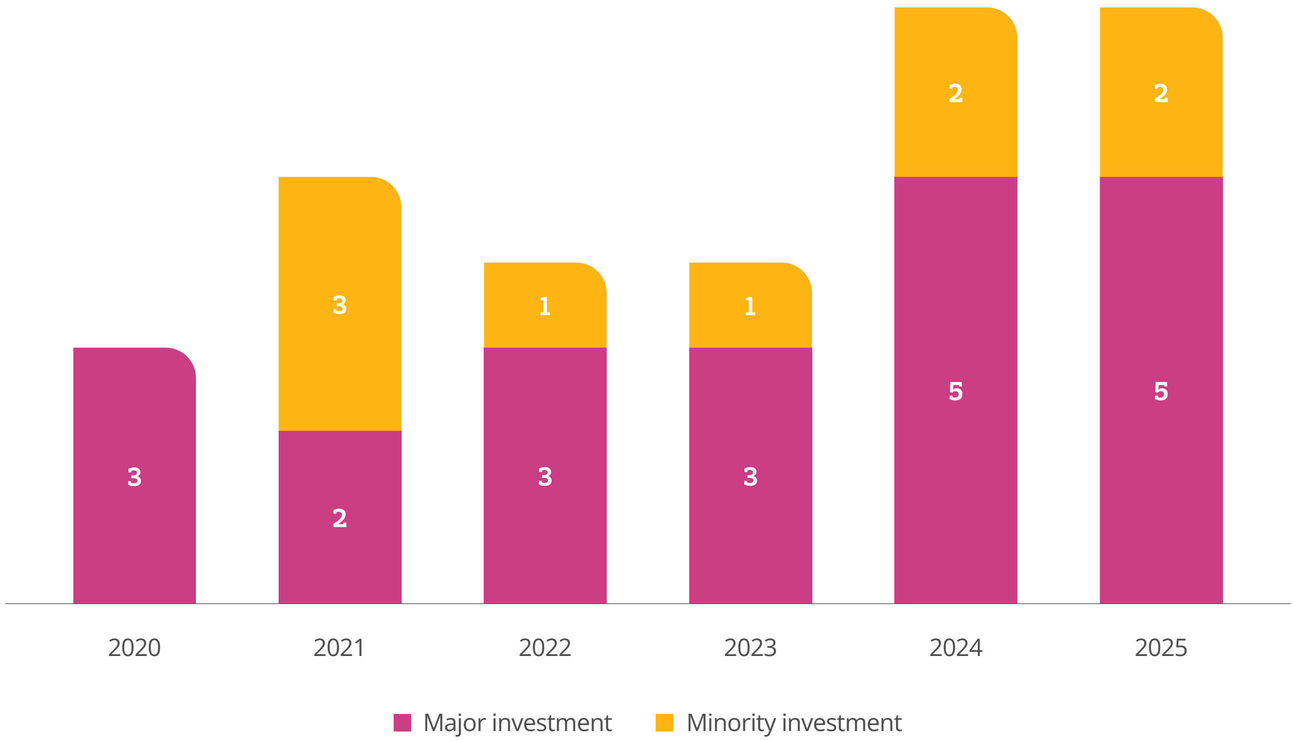
Date	Target	Target territory	Acquirer	Investor type	Deal type
January 2025	Roko Health Clubs	United Kingdom	Frasers Group plc	Public Limited Company	Majority
March 2025	Solo60	United Kingdom	Bauer Family Office	Venture Capital	Minority
April 2025	Anytime Clubs UK Ltd	United Kingdom	Mr Justin McDonell Mr Richard Peil	Private Equity[20]	Majority
May 2025	Folkestone Sports Centre Trust Limited	United Kingdom	The Sports Trust	Public operator	Majority
June 2025	Trident Gyms	United Kingdom	The FSE Group	Venture Capital	Minority
July 2025	Hunt Fitness Ltd	United Kingdom	B Fit Group Ltd	Privately held	Majority
September 2025	Pump Gyms Ltd	United Kingdom	NRG Gyms Ltd	Private Equity	Majority

Source: Mergermarket; Pitchbook; Orbis; CIQ; Grant Thornton Analysis.

20. Purpose Brands, which helped fund the deal, is a portfolio company of Roark Capital.

21. Historical figures are consistent with previous versions of this report.

Figure 12: Deal volumes by investment type



Source: Mergermarket; Pitchbook; Orbis; CIQ; Grant Thornton Analysis.

Mergers and Acquisitions (M&A) activity in the UK health and fitness market in 2025 reflected a sector that continues to consolidate, adapt and evolve.

Following the rebound in 2024, where the sector recorded its highest number of deals since the COVID-19 pandemic, activity in 2025 remained steady, with 7 transactions identified across the year.

2025 demonstrated continued investor confidence, particularly in scalable operating models and regional consolidation strategies. Meanwhile, international interest in UK concepts persisted, and growth capital continued to support tech enabled platforms. Together, these trends signal a sector that is maturing while still offering multiple entry points for investors.

Consolidation as a key driver of majority transactions

As in 2024, majority acquisitions remained a central feature of market activity. Deals such as NRG Gyms' acquisition of Pump Gyms, which expanded NRG's estate from seven to twelve sites, show how operators use M&A to accelerate footprint growth and reinforce competitive position in regional markets. The acquisition allowed NRG to nearly double its membership base and better leverage operational synergies across its estate.

Similarly, B Fit Group's acquisition of Hunt Fitness marked its third consecutive acquisition, underscoring the emergence of targeted roll up strategies among mid-market operators. These transactions reflect a wider pattern: while organic growth remains important, the speed and efficiency gains of strategic acquisition continue to be attractive for both operators and investors.

At the larger end of the market, Everlast Gyms' acquisition of four Roko Health Clubs (part of Frasers Group PLC) highlighted the continued blurring of lines between retail, sport and wellness as conglomerates expand their fitness footprints.

Growth capital supporting tech enabled and asset light concepts

Minority investment activity in 2025 continued to target platforms with scalable, technology enabled operating models. Concepts such as Solo60, which raised £2m to support estate expansion and technology development, and Ryde Studios, which secured investment to open new sites and strengthen its digital infrastructure, exemplify this theme. Solo60's model, with its proprietary booking and access technology with no on-site staff required, resonates with investors due to the asset-light structures, flexible usage and ability to serve niche but growing consumer communities. The momentum observed in 2025 reflects broader shifts in consumer behaviour, including the blended use of in-person and digital fitness highlighted in consumer analysis from the 2024 report.

Public and community sector transactions supporting local recovery

Public sector transactions, while fewer in number, continued to play an important stabilising role. The acquisition of Folkestone Sports Centre by The Sports Trust, following the insolvency of the previous operator, underlines the importance of community focussed organisations in safeguarding access to essential health and wellbeing facilities. The transaction enables portfolio integration across Folkestone's wider sports assets and ensures continuity for local residents.

Insights from discussions with sector analysts reinforce several of the underlying factors shaping recent transaction activity. Analysts highlighted increases in member engagement and visit frequency, indicating a resilient demand base that supports operators pursuing scale through acquisition. They also observed that operators are generating a greater share of returns through pricing and yield rather than rebuilding member volumes back to pre-pandemic levels. This reflects a focus on improving the performance of existing estates, consistent with the strategic logic behind recent majority transactions in which value is created through estate efficiency and portfolio synergies. Analysts further emphasised the growing strategic importance of scalable, technology enabled operating models, aligning with the profile of concepts attracting growth capital across the sector.

Other notable ownership changes and structural events

Alongside the core transactions, 2025 also saw several ownership shifts that provide insight into how operators are managing succession, investor liquidity and organisational continuity.

One such example was the transfer of David Lloyd Leisure into TDR Capital's newly formed continuation vehicle. Although not a market changing acquisition, the move reflects how private equity increasingly uses continuation funds to retain high-performing assets while creating liquidity options for existing investors. Operational leadership remains unchanged. The transfer is consistent with wider private equity trends where continuation vehicles are used to extend ownership and support ongoing value creation plans.

A different form of transition occurred with the move of Gymworks Holdings into an Employee Ownership Trust (EOT). Unlike conventional M&A, EOTs support founder succession while preserving stability for staff and members. This transaction highlights the variety of exit pathways now emerging across the UK fitness landscape, particularly for mid-sized operators not seeking traditional consolidation routes.

The growth capital investment into Ryde Studios Ltd provides an important indication of where emerging concepts may develop next. Studios have historically sat at the edge of the sector, but they are increasingly becoming testing grounds for new training formats, immersive experiences and differentiated, community led propositions. As operators and investors explore more flexible, high engagement models, boutique studios are likely to act as early markers of shifting consumer demand, particularly around hybrid memberships, specialised coaching and premium small group training. Ryde's expansion into new cities illustrates how these concepts can influence expectations across the wider market, with advances in personalised programming, technology integration and experiential design potentially shaping the next wave of innovation for larger operators.

06. The trends that are shaping the sector

Findings from ukactive's consumer survey, extensive stakeholder engagement, and desktop research[22] were combined to identify six key trends shaping the sector in 2025, covering:

01. **Market demand and participation dynamics**

02. **Demographics, inclusion and motivations**

03. **Health prevention, integration and changing demand**

04. **Facility and proposition evolution**

05. **Price and value**

06. **Technology and data**

22. Full methodology and terminology details for each data source can be found in Appendix A.

01. Market demand and participation dynamics

Consumer demand keeps market momentum high

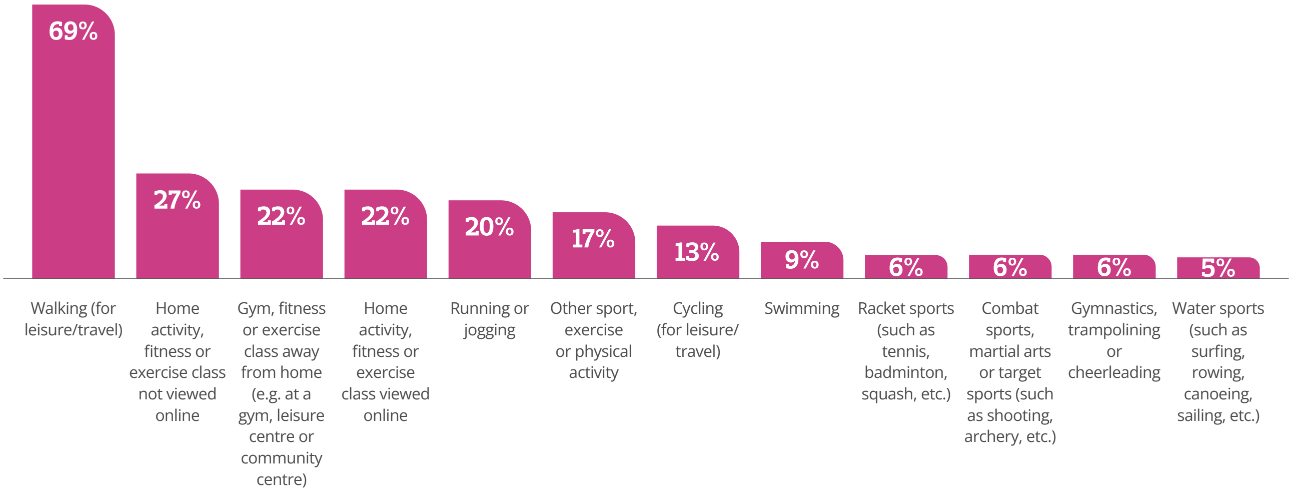
The consumer survey showed that, behind walking (69%), which as in 2024 remains the most popular form of activity, the next most common activities undertaken at least twice a week were: home-based exercise without online content (27%); gym, fitness or exercise classes away from home (22%); and home exercise using online content (22%). Taken together, these patterns show that demand remains resilient; a message echoed through stakeholder engagement, where operators consistently reported steady market momentum and strong underlying participation.

Survey data further highlights that demand continues to be driven by younger adults (both Gen Z and millennials), who are the most active overall, the most likely to be members and who tend to spend longer per visit than older age groups. Patterns of participation remain blended, with consumers frequently combining gym membership with engagement in other fitness settings.

Although a higher proportion of respondents still exercised at home as opposed to a gym, fitness or exercise class away from home, home and outdoor activity sit alongside, rather than replace, gym usage. For example, 54% of people who use online content at home are also members of a gym or leisure centre, and even activities typically done outdoors show strong crossover (such as the fact that 64% of regular runners are also gym members).

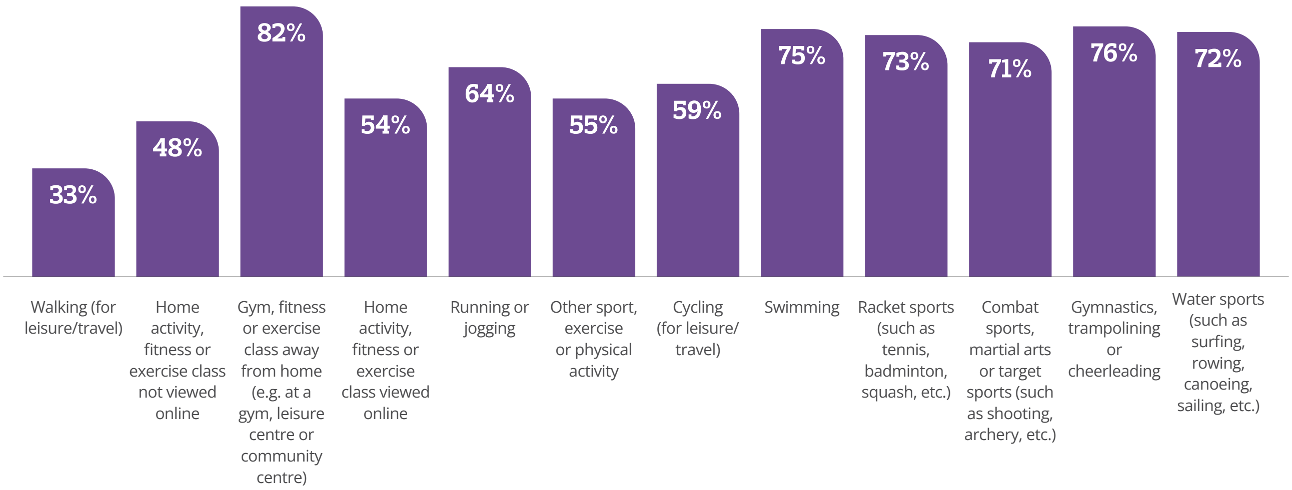
Together, this indicates that gym and leisure facilities increasingly act as hubs that support broader activity routines rather than standalone activities. At the same time, there remains a segment of active individuals who are not gym members. Many of these people – such as regular runners or cyclists – may benefit from access to gym equipment or structured sessions to enhance aspects of training not easily achieved outdoors, indicating a potential growth opportunity for the sector.

Figure 13: Proportion of survey respondents that exercise at least twice a week in the following fitness settings[23]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

Figure 14: Proportion of survey respondents that exercise at least twice a week who are current members of a gym or leisure facility[24]

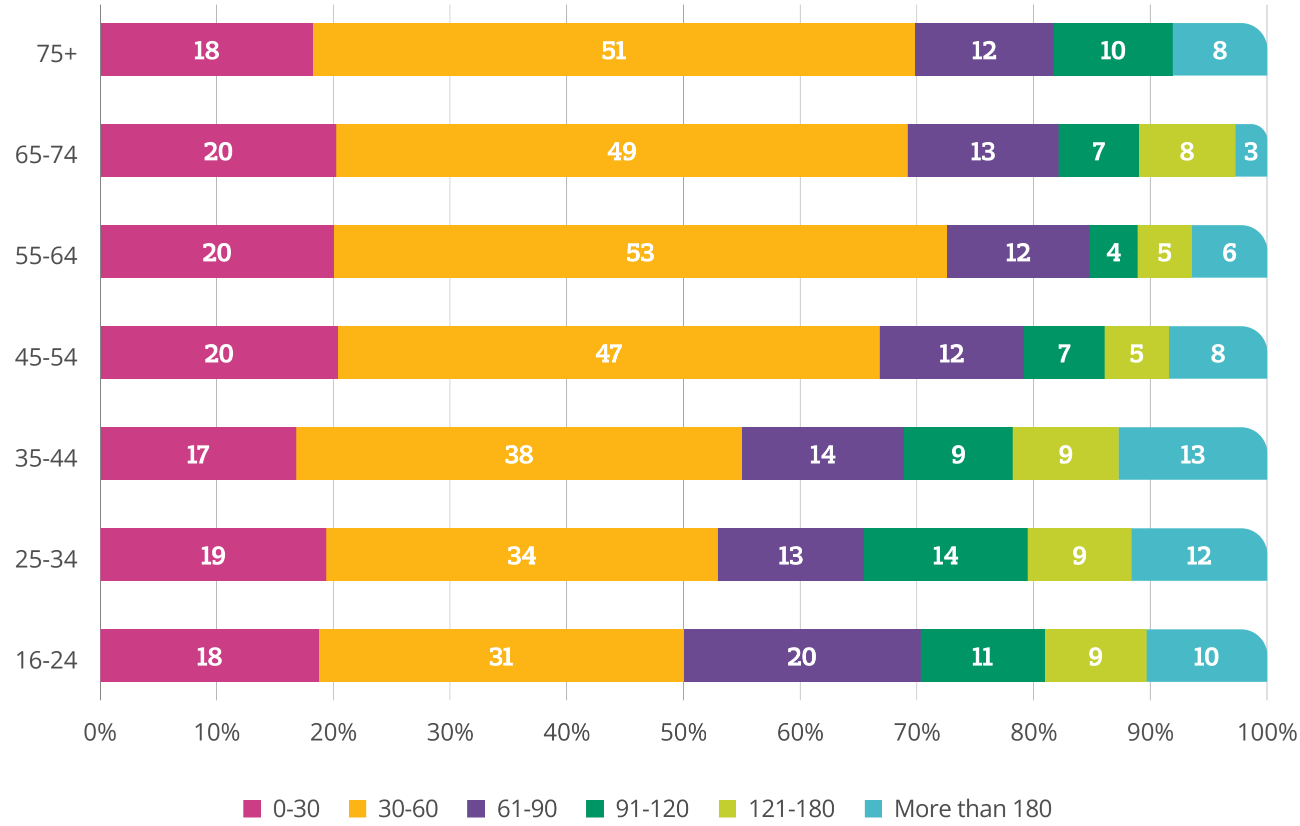


Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

ukactive's consumer survey shows younger respondents who participate in gym-based activity are the most likely to spend over 60 minutes per visit, with average visit duration decreasing steadily across each older age group and falling most sharply among adults aged 65 and over. This pattern reflects the differing needs and preferences of older adults.

23. Consumer insight survey question: How frequently, if at all, do you take part in the following activities? BASE: All respondents.
24. Consumer insight survey question: How frequently, if at all, do you take part in the following activities? BASE: All respondents.

Figure 15: Average length of time respondents, who take part in gym workouts, participate per visit by age[25]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents who participate in gym-based activity; 'Don't know' responses have been excluded from the analysis.

Membership remains a strong predictor of physical activity – reinforcing the value of conversion

As in 2024, the 2025 consumer survey again shows a strong relationship between gym or leisure facility membership and overall physical activity. Current members are substantially more active than non-members.

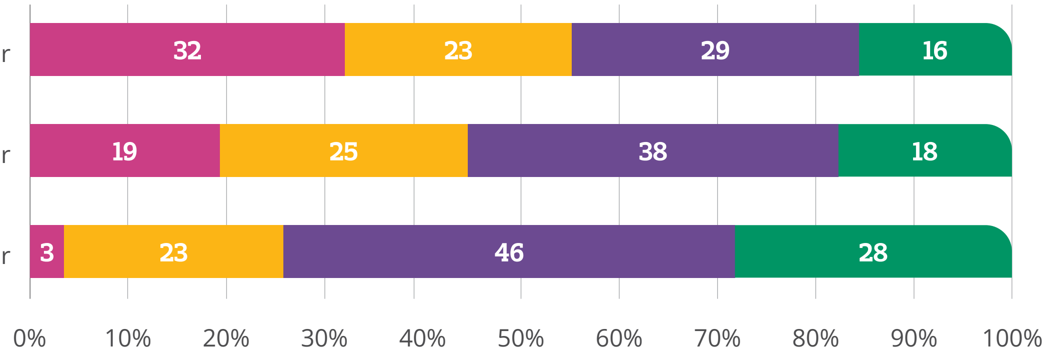
Only 3% of current members reported being completely inactive, compared with 32% of those who have never been members – meaning non-members are around ten times more likely to be inactive than members. Those who have previously been members fall in between, with 19% reporting no activity.

Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

25. Consumer insight survey question: You said you take part in gym workouts. On average, how long do you participate in these activities per visit? BASE: All respondents who are active at the gym, fitness or exercise class away from home.

26. Consumer insight survey question: How many minutes, if any, of moderate or vigorous intensity physical activity do you do per week? Moderate activity is defined as activity where you raise your heart rate. Vigorous activity is where you're out of breath or are sweating (you may not be able to say more than a few words without pausing for breath). BASE: All respondents.

Figure 16: Minutes of moderate or vigorous intensity physical activity per week by membership status (%)[26]



This pattern highlights the powerful role that gyms and leisure facilities play in supporting active lifestyles. Converting non-members into joiners, and re-engaging former members, is therefore likely to have a large impact on physical activity participation levels.

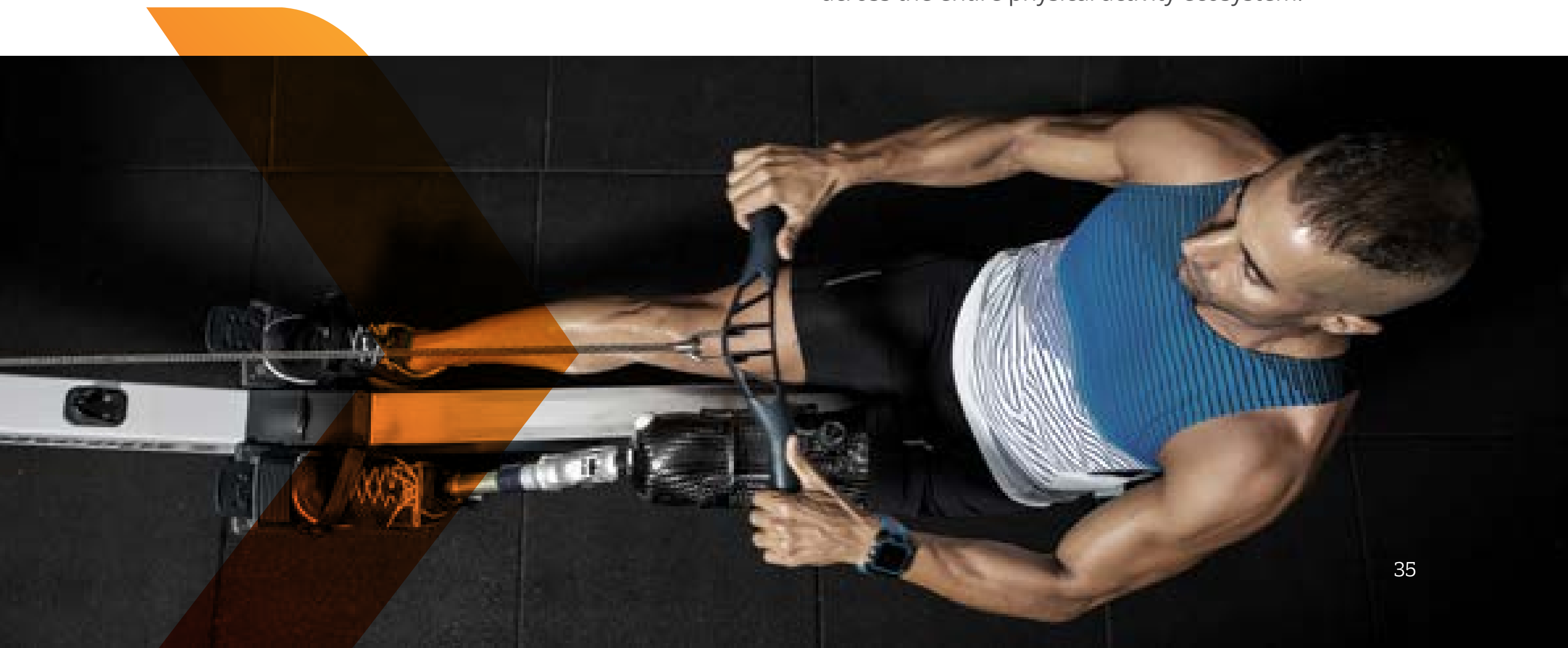
Sports councils increasingly recognise the critical role that gyms and leisure centres can play in supporting people to become and stay active. For many people, especially those currently inactive, accessible fitness environments provide the first step into movement from which they can progress into community sport or regular physical activity, something that is particularly true of swimming.

Stakeholders also noted a shift in how traditional sports spaces, especially within public-sector facilities, are being repurposed.

This includes not only converting areas to accommodate emerging or hybrid formats such as padel, functional zones and multi-purpose spaces, but also reallocating space for additional gym equipment to drive higher utilisation.

These changes reflect a demand-led approach, with operators prioritising formats and equipment that maximise usage, meet evolving member expectations and attract younger, more diverse audiences.

Taken together, these insights demonstrate that increasing membership penetration not only strengthens operators' commercial performance but also contributes meaningfully to population-wide physical activity, while acting as a gateway into wider sport participation. This makes membership conversion one of the sector's most valuable levers for improving public health and expanding participation across the entire physical activity ecosystem.



02. Demographics, inclusion and motivations

Demographic divides persist

Engagement with gym and leisure facilities continues to vary by age, gender, socioeconomic group and region.

Figure 17: Gym or leisure facility membership status by age group (%)[27]

Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

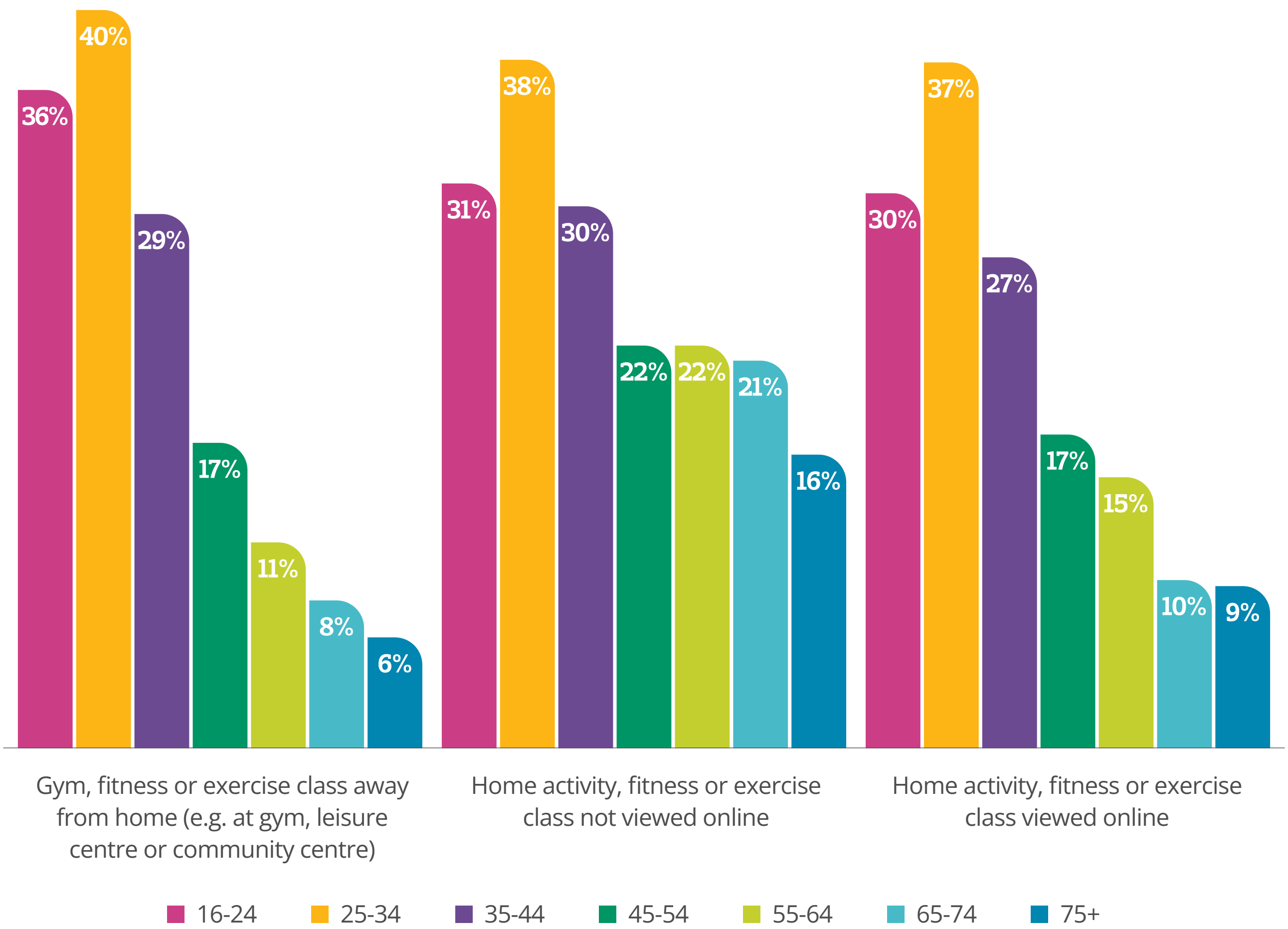
27. Consumer Insight survey question: Are you currently, or have you ever been, a member of a gym or leisure facility? BASE: All respondents.

As noted, membership levels are highest among younger adults, with those aged 25–34 the most likely to be current members – an 11-percentage-point increase on last year's data, which also showed this age group leading membership penetration. They are followed closely by 16–24-year-olds. In contrast, membership rates drop sharply from age 45 onwards, and nearly 60% of adults aged 65+ have never held a gym membership. This points to a clear generational shift, with younger cohorts increasingly viewing gym membership as a normal and essential part of their lifestyle. Research by The Gym Group reinforces this, reporting that Gen Z place fitness at the centre of their lifestyle with 44% ranking fitness as their first or second discretionary spending priority, even amid wider cost pressures[28].

Analysis shows that younger adults drive the majority of gym-based activity and value holistic wellbeing. In contrast, older adults report higher levels of inactivity, perceive lower value in memberships and show a stronger preference for age-relevant and lower-impact activities, such as swimming.

Survey data also indicates that 16–34-year-olds are the age group most likely to go to a gym, fitness or exercise class away from home at least twice a week – and they are more likely to do this than take-part in home-based activity, fitness or exercise classes, whether online or independently.

Figure 18: Proportion of survey respondents that exercise at least twice a week in the following fitness settings by age group[29]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

28. The Gym Group Gen Z Fitness Pulse Report 2025.

29. Consumer insight survey question: How frequently, if at all, do you take part in the following activities? BASE: All respondents.

For all other age groups, this trend reverses, with away-from-home participation declining substantially with age, with older adults more likely to choose home-based exercise over facility-based activity. Home-based activity participation at least twice a week declines more gradually across age groups, suggesting that those older adults who remain active prefer to do so at home. Older respondents do, however, also cite using online classes less frequently. These patterns highlight an opportunity for operators to offer more targeted, age-specific support for older adults, helping to keep facilities relevant and accessible across all life stages and improving engagement and retention within this demographic.

At the other end of the spectrum stakeholder engagement shows that some operators are exploring lowering age thresholds for supervised participation, and youth formats such as Hyrox Young Stars are already seeing sellout events. While this expands the participation pipeline, stakeholder need to ensure existing safeguarding, liability and staff training requirements for safe delivery, remain robust and appropriate as the operating context evolves.

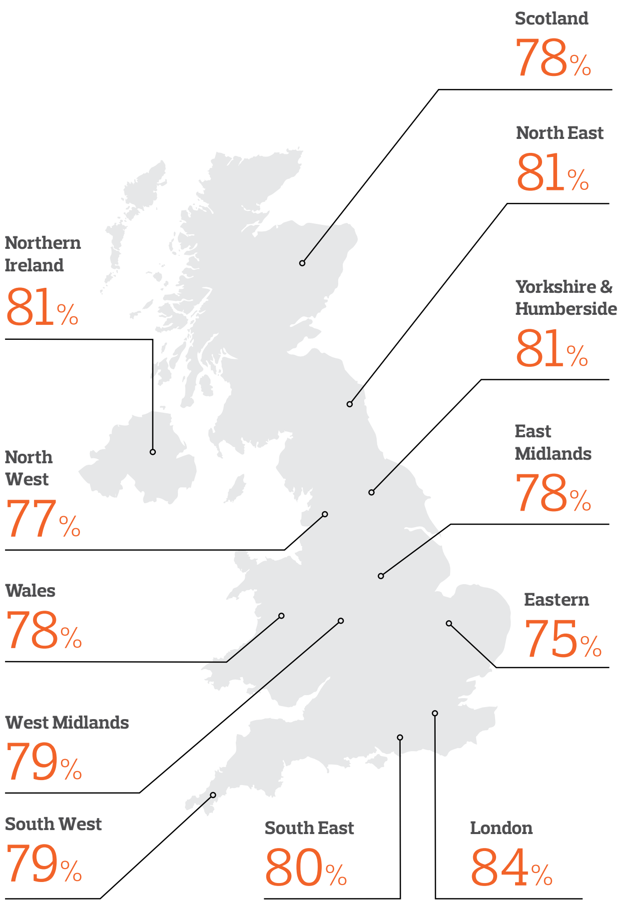
While age remains a strong correlate of behaviour, some stakeholders suggest that self-identity often determines facility choice and training style. For example, some older adults identify strongly with a more athletic, strength-focused persona and therefore gravitate toward environments that feel energetic, purposeful and performance-oriented, rather than settings traditionally associated with "older-adult" provision[30]. This underscores the importance of designing offers around personas rather than age groups alone, helping to broaden appeal, enhance inclusivity and create environments that support how people see themselves, not simply how old they are.

Differences also emerge by gender, with survey data showing men are slightly more likely to meet the recommended 150+ minutes of activity per week and more likely to participate in gym or outdoor fitness modes. Women, meanwhile, are more inclined toward online home exercise and report higher confidence-related barriers to gym or leisure facility membership.

This reflects work undertaken by ukactive in partnership with Sport England's This Girl Can campaign on the Safer Spaces to Move project which is designed to help women and girls to feel safer and more confident while being active in gyms, fitness and leisure facilities.

Regional contrasts persist too. Activity levels remain highest in London, while other areas show lower engagement, reinforcing the importance of location and access in shaping participation.

Figure 19: Proportion of survey respondents taking part in at least 30 minutes of moderate or vigorous intensity physical activity by geography (%)[31]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents.

30. This reflects ukactive's The Life in our Years report (2021) which highlights that older adults want activity offers to be based on ability rather than age, with programmes and classes categorised "by ability or intensity, not by age". This directly supports the argument that many older adults do not identify with stereotypical "older-adult" provision, and instead seek programmes aligned with their preferred style of training.

31. Consumer Insight survey question: How many minutes, if any, of moderate or vigorous intensity physical activity do you do per week? Moderate activity is defined as activity where you raise your heart rate. Vigorous activity is where you're out of breath or are sweating (you may not be able to say more than a few words without pausing for breath). BASE: All respondents.

Together, these variations highlight that engagement with fitness and physical activity is far from uniform, and that successfully meeting consumer needs requires offers that are targeted, inclusive and sensitive to demographic differences.

Motivations are reshaping the offer: from "look good" to "feel good" and "age well"

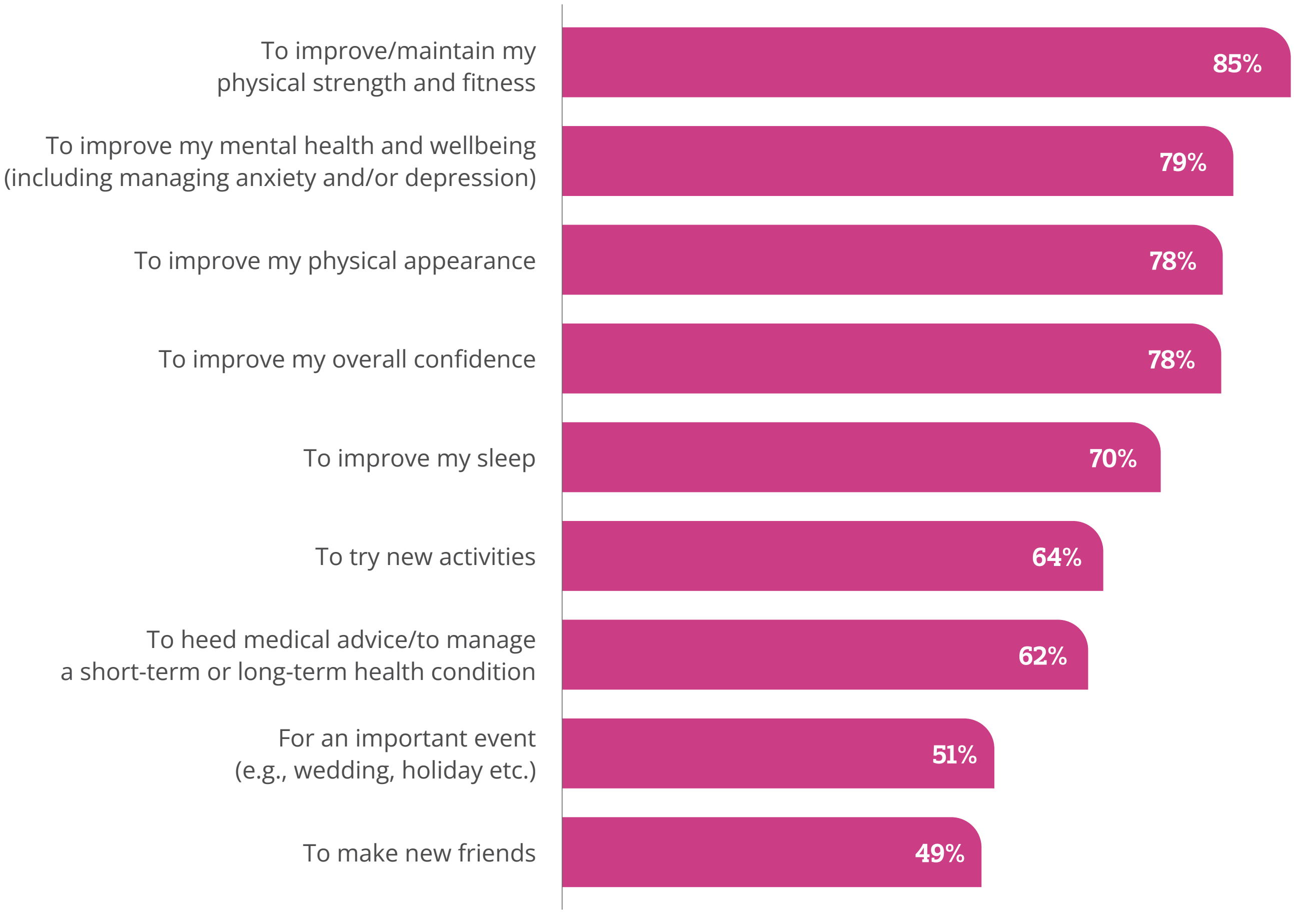
Consumer motivations continue to evolve, and this year's survey reinforces the ongoing shift from purely aesthetic goals towards strength, wellbeing and healthy ageing.

Improving or maintaining physical strength and fitness remains the top motivator for taking out a gym membership, as it was in 2024.

This confirms that physical improvement is still the core driver for most gym-goers. Close behind, the desire to improve mental health and wellbeing remains the second most influential motivator, identified as important by 79% (up from 76% in the previous year) or more of respondents across every age group.

Notably, motivation to heed medical advice or manage a short- or long-term health condition has increased from 56% to 62%, suggesting growing awareness of the role that gym-based activity can play in prevention, rehabilitation, risk reduction and lifelong functional fitness.

Figure 20: How important or unimportant were the following factors in your decision to take out a membership (net: quite important, very important)?[32]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents who are members of a gym or leisure facility; Don't know' responses have been excluded from the analysis.

32. Consumer insight survey question: How important or unimportant were the following factors in your decision to take out a membership? BASE: All respondents who are a member of a gym or leisure facility.

While improving or maintaining strength and fitness remains the primary driver for members across all ages and genders, motivations have clearly broadened. Mental health, confidence and sleep sit not far behind strength, and motivation linked to medical advice appears to be on the rise – signalling growing openness to preventative health and lifelong functional fitness. Younger generations expect holistic wellbeing and safe, confidence-building environments, while older adults increasingly prioritise maintaining independence, managing conditions and engaging in lower-impact activity.

Age continues to shape the reasons people join or return to gyms and leisure facilities. Among adults aged 65–74, an overwhelming 95% cite improving or maintaining strength and fitness as a key motivator, reflecting rising awareness of the importance of training for mobility and independence as people age. Older adults aged 75+ also rank the motivation to act on medical advice or manage health conditions relative to other factors, more highly compared to other age groups.

Among 35–44-year-olds, improving physical appearance peaks as a driver – this is the only age group in which appearance is rated as highly as improving or maintaining strength and fitness (86%). For younger adults, confidence and wellbeing play a larger role: improving overall confidence is especially influential for those aged 16–44, with importance peaking at 82% among the 35–44 cohort before declining steadily in older groups. Younger respondents are also more likely to view fitness facilities as tools for managing anxiety, depression, sleep and stress.

Conversely, "making friends" and "preparing for an important event" rank consistently lower across all age groups. However, the desire for social connection holds slightly higher relative importance for the oldest age groups, suggesting that while percentages remain modest, this becomes more relevant later in life.

Figure 21: Percentage of respondents who are a member of a gym or leisure facility who consider the following important[31]

Percentage of respondents who are a member of a gym or leisure facility who consider the following important (very important and quite important)	Age group						
	16–24	25–34	35–44	45–54	55–64	65–74	75+
To improve/maintain my physical strength and fitness	83%	85%	86%	84%	86%	93%	82%
To improve my overall confidence	82%	81%	82%	78%	67%	62%	56%
To improve my mental health and wellbeing (including managing anxiety and/or depression)	80%	82%	83%	78%	70%	67%	54%
To improve my physical appearance	79%	83%	86%	77%	59%	61%	48%
To improve my sleep	69%	75%	77%	69%	63%	48%	38%
To try new activities	62%	68%	69%	63%	54%	49%	44%
To heed medical advice/to manage a short-term or long-term health condition	58%	64%	70%	59%	57%	55%	59%
For an important event (e.g., wedding, holiday etc)	55%	57%	59%	45%	34%	19%	17%
To make new friends	51%	53%	57%	41%	37%	37%	40%

Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents who are a member of a gym or leisure facility; 'Don't know' responses have been excluded from the analysis.

While the overall order of motivators is similar for men and women, a few distinctions emerge.

Women are more likely to cite improving mental health and wellbeing and a desire to try new activities, whereas men are more likely to identify making new friends as an important motivator.

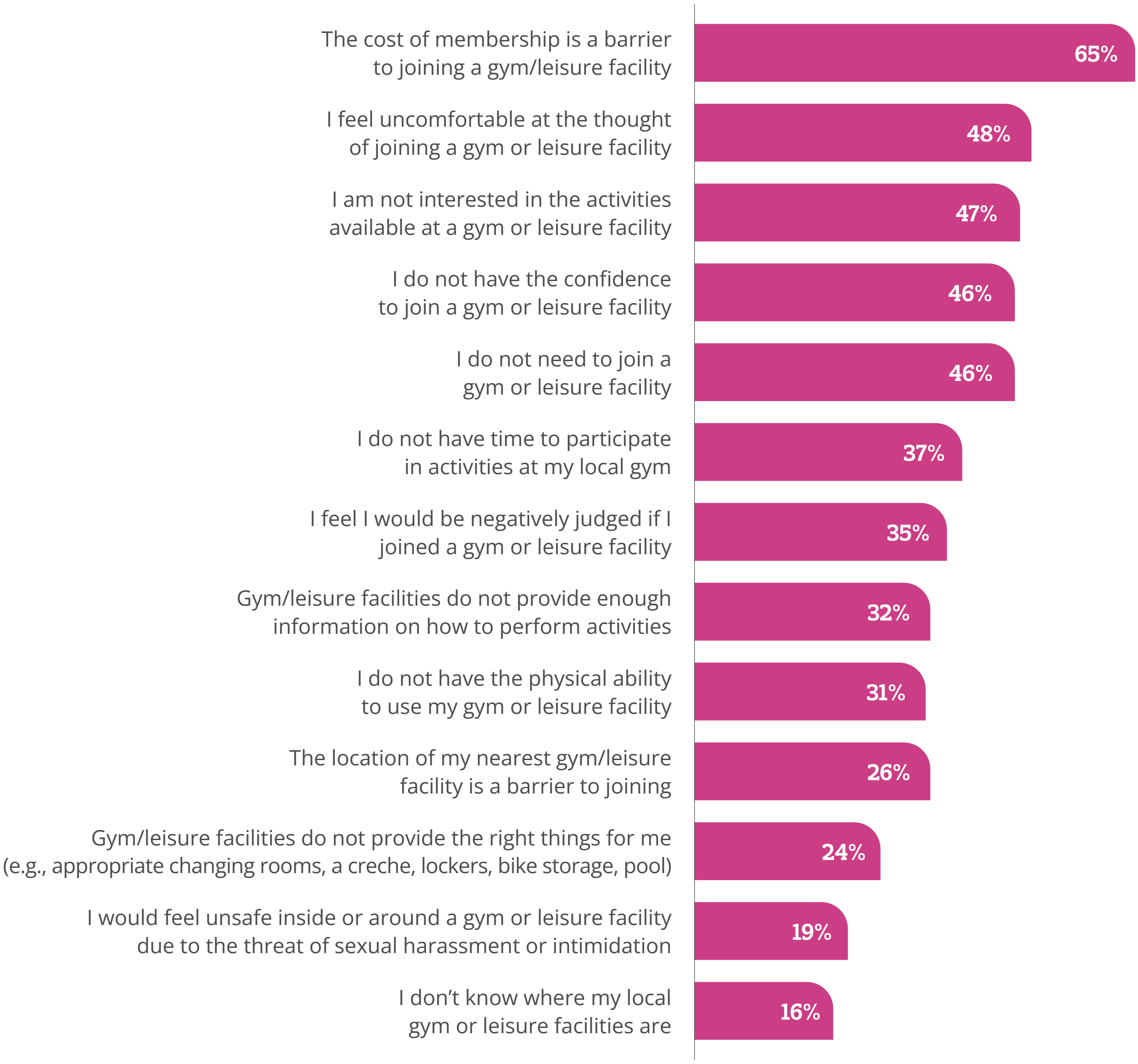
This highlights the continued relevance of gyms and leisure facilities as places that support not only fitness and wellbeing but also social connection, particularly for men, through the communities they create.

Confidence and relevance are key considerations in relation to value

While cost remains the most frequently cited barrier to joining a gym or leisure facility, with 68% of non-members identifying it as an obstacle in the consumer survey. Feedback through the stakeholder engagement did, however, emphasise that cost is not simply a question of price – it is fundamentally a question of perceived value.

When people do not recognise the relevance or usefulness of the offer, even relatively affordable memberships can feel “too expensive”. This is reflected in the fact that almost half of non-members say they do not need to join (46%) or are not interested in the activities offered (47%), revealing a substantial relevance gap across the population.

Figure 22: Ranking of barriers to taking out a membership for non-members (%)[33]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents who are not currently a member of a gym or leisure facility; 'Don't know' responses have been excluded from the analysis.

33. Consumer insight survey question: To what extent do you agree or disagree with the following statements? BASE: All respondents who are not current members of a gym or leisure facility.

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Confidence barriers are disproportionately high for women, younger adults and people with health conditions

Confidence-related barriers are widespread among non-members, increasing by a couple of percentage points compared to last year – but women, younger adults (16–34) and those with health conditions are affected most. Women are more likely than men to report feeling uncomfortable, fearing negative judgement, or lacking information on how to perform activities. Younger adults also show higher uncertainty and discomfort in gym environments.

Non-member respondents with health conditions experience deeper, more complex barriers on the whole but confidence is also key. They report higher levels of discomfort, fear of judgement and lack of confidence compared with the wider population, suggesting that traditional gym environments may feel intimidating or unsuitable for those managing health issues.

These insights highlight opportunities for operators to reduce confidence barriers through clearer instruction, beginner-friendly layouts, structured onboarding, health-aligned pathways and environments designed to feel welcoming and psychologically safe. Early positive experiences can help embed lasting activity habits.

For men and older adults, relevance matters

In contrast, men more commonly cite lack of need (51%) or lack of interest (52%) than women (41% and 42% respectively) in taking out a gym membership. This reflects an important nuance: men's higher activity levels and membership rates do not necessarily translate into broader interest among non-members, many of whom are active through other forms of exercise but do not see the gym as relevant to their needs. Operators may need to rethink aspects of their offer to appeal to active men who do not currently view gyms as aligned with their training needs.

For older adults, the blockers are more about relevance ("don't need it", "not interested") than confidence, signalling a need to reframe value around function, social connection and independence rather than traditional "gym" offers. Retaining older members therefore appears to depend on whether gyms truly reflect their motivations, capabilities and expectations, not simply on lowering price.

Data from ukactive also shows that strengthening programmes remain under-adopted across older demographics, even though strength is the clearest correlate of functional independence. This gap reinforces the need for operators to clearly highlight the practical benefits of strength training – mobility, confidence and independence – when communicating value to older adults[34,35].

Reasons for leaving follow the same patterns

When asked why they had cancelled a membership, respondents across all age groups most frequently cited cost, with "too expensive generally" consistently topping the list, especially among those aged 45–54. Many people also leave because they were not using their membership enough, a reason that becomes more common with age, particularly for those over 55.

Younger adults are more likely to cancel due to lost motivation or lack of time, reflecting life-stage pressures and shifting routines. Older adults, in contrast, more often leave because of under-use, injury, or a newly diagnosed long-term condition, indicating that practical and health-related barriers play a greater role later in life. A small but steady proportion across all age groups report switching to alternative ways of exercising, including home-based or informal activity.

Non-members identify several practical and confidence-building changes that would make them more likely to take out a membership. The strongest drivers are:

- Lower or more flexible pricing (affordability remains the top lever).
- Clearer guidance and instruction on how to get started.
- A welcoming, well managed environment that feels comfortable and judgement free.

These findings reinforce that cost, confidence and relevance are the three pivotal levers for converting non-members into joiners. While cost remains the most universal barrier, younger adults and women face higher confidence barriers, while older adults face greater issues of relevance and alignment with their interests, abilities and health priorities.

Together, these insights show that overcoming barriers requires more inclusive design, clearer communication of value, and age and gender sensitive support, ensuring that gyms and leisure facilities feel relevant and accessible to a broader range of people.

34. Shaping a new era of strength training, ukactive.
35. Gen Z loves to lift but one in three Brits do no strength exercise at all, sparking national health warning, ukactive.

03. Health prevention, integration and changing demand

Health integration needs more innovation to reach its potential

Stakeholder engagement shows that public leisure continues to lead the way on GP referral pathways and condition-specific programmes, with operators reporting increasing interest from healthcare partners and growing consumer motivation to follow medical advice – although provision remains patchy across the country. At the same time, stakeholders also highlighted a persistent challenge: while the sector's capability to support preventative health, rehabilitation and long-term condition management is improving, consumer confidence has not yet caught up. Many described a "perception gap", where leisure settings can deliver more than the public – and parts of the public sector – currently recognise, with inconsistent national referral routes and language limiting the sector's visibility as a credible health-support environment.

A clear example of this perception gap is daytime rehabilitation capacity. Stakeholders noted that recommended levels of post-event physical activity – such as the activity volumes advised in stroke rehabilitation – are often not being met in practice, with patients often receiving less activity than clinical guidelines suggest. Public leisure facilities have the daytime space, equipment and trained staff to help close this gap, offering safe, supervised activity that complements clinical care. However, institutional partnering barriers and inconsistent referral pathways continue to slow progress, meaning this potential remains under-realised.

Preferences for where respondents would like to receive support for a health condition vary by age and condition type, demonstrating that the respondents do not view all health interventions as equally suited to community or leisure settings[36].

These patterns show younger adults are more open to receiving health support in leisure settings. For these age groups, fitness environments feel familiar, convenient and aligned with their understanding of preventative health and wellbeing.

Those with neurological conditions, mental health conditions or obesity are more open to support in a gym or leisure centre. Some of these align closely with services already present in community leisure settings, such as mental-health-supported activity programmes. However, important gaps remain.

Together, these findings show that while operators – particularly public leisure – are expanding their health offer, access is varied and consumer perceptions lag behind sector capability. Bridging this gap will require:

- Clearer national referral pathways.
- Consistent and credible language about the role leisure can play in health.
- Awareness-building, especially among older adults and those with long-term conditions.
- Stronger collaboration between clinicians, local systems and operators.
- Visible, confidence-building health offers integrated into leisure settings.

The opportunity is substantial, but realising it depends on closing the perception gap so that consumers, clinicians and communities fully recognise the supportive role gyms and leisure centres can play in prevention, condition management and healthy ageing.

36. It is important to note that some conditions are, by nature, more appropriate for clinical treatment.

GLP-1: a subset of new needs

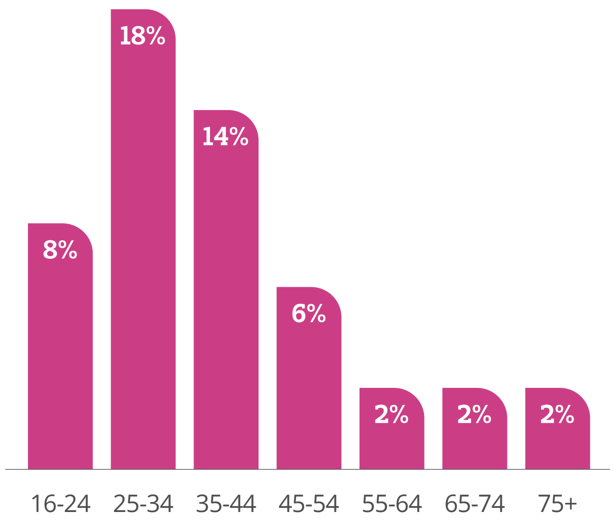
GLP-1 usage is reshaping expectations for a subset of consumers. Survey data indicates that around 8% of respondents report currently taking a GLP-1 weight-loss medication – a figure in line with recent national estimates[37] and slightly higher than earlier estimates of approximately 5%[38]. This difference suggests that GLP-1 adoption is evolving rapidly, with usage expanding quickly and public awareness increasing.

However, it is also important to note a methodological caveat: this question was introduced only in the final two waves of the survey, meaning the dataset is still maturing and the sample size is more limited for this measure. From next year, with a full year of consistent data collection, it will be possible to track comparative trends over time and comment more confidently on the direction and pace of change.

Survey data suggests GLP-1 usage is disproportionately concentrated among working-age adults, not older adults – even though older adults carry greater obesity-related disease burden.

Therefore, the audience most likely to be using GLP-1s is also the audience most likely to be gym members and strong potential crossover between GLP-1 users and fitness participation, but only if the sector offers clear, strength-preserving, confidence-building pathways that meet their changing needs.

Figure 23: Proportion of survey respondents who currently take any GLP-1 weight loss medication such as Ozempic, Wegovy, and Mounjaro by age[39]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; Prefer not to say' responses have been excluded from the analysis.

Operators are already beginning to respond. Stakeholders reported efforts to train staff, develop privacy-safe support pathways, and emphasise the importance of strength training to help preserve muscle mass during weight loss. The key message emerging across the sector is to avoid "othering" members on GLP-1s, instead adapting support where appropriate and aligning with evolving health guidance so that individuals on medication continue to see gym-based activity as essential to safe, sustainable weight management.

Evidence from ukactive's recent GLP-1 review reinforces this need[40]. The report warns that rapid weight loss without structured resistance training can lead to profound muscle and bone loss, with long-term consequences for metabolic health, functional independence and injury risk. Strength training is therefore recommended as a non-negotiable component of any safe weight-loss pathway – particularly for older adults, even though they are currently less likely to be using GLP-1s.

Consumer survey data further highlights the scale of opportunity. Among respondents currently taking GLP-1 weight-loss medication, 70% report being current gym members[41]. While we do not know whether these individuals were members before starting medication, this overlap suggests there may be a growing group who are now seeking structured activity alongside pharmacological support.

At the same time, 30% of respondents currently taking any GLP-1 weight-loss medication are not current gym members, indicating a substantial untapped demographic. This group may be particularly receptive to support that helps them begin or sustain physical activity, presenting a clear opportunity for operators to engage individuals who could benefit greatly from accessible, confidence-building programmes.

37. Weight loss drugs in Britain: How they're changing grocery spending, takeaway consumption and food choices, YouGov, March 2026
38. Donnelly L. Revealed: 2.5m Britons now use weight loss jabs. The Telegraph. https://www.telegraph.co.uk/news/2025/10/10/two-million-britons-using-weight-loss-jabs-mounjaro-wegovy/. October 10, 2025.
39. Consumer insight survey question: Do you currently take any GLP-1 weight loss medication such as Ozempic, Wegovy, and Mounjaro? Base: All respondents.
40. GLP 1 medications and muscle mass preservation: Implications and recommendations for the health and fitness sector.
41. Please note sample size as detailed in Appendix A "Details on consumer survey data" and the methodological caveat: this survey question was introduced only in the final two survey waves, meaning the dataset is still maturing.

04. Facility and proposition evolution

Facility evolution: strength, recovery & third-place design

Demand rather than supply is shaping facility design more than ever. Stakeholder engagement consistently described a market being pulled forward by consumer behaviour, rather than being pushed by legacy facility models. Operators across all segments reported continued shifts towards strength-first layouts, with larger free-weights and functional zones as well as more visible, confidence-building spaces for women and newer users.

Recovery and health span services – including saunas, cold plunge, infrared and red-light therapies, and compression boots – were also seen as moving from niche to normal. Stakeholders also noted that many sites now function as "third places", particularly for Gen Z, with facilities used flexibly throughout the day for training, recovery, socialising or working.

Public leisure operators, in particular, highlighted their role as community hubs, with facilities increasingly being designed to meet the need of local communities through co-location with other services. These changes were universally described as strategic growth levers, not simple refurbishments, aligning the sector more closely with emerging consumer expectations.

Both public and private operators also report more of a trend in opening some smaller footprint facilities. This reflects a shift toward meeting people where they are, creating spaces that are closer to communities. For public operators, these sites help extend reach and support wider activity goals in areas that may not sustain a full-scale leisure centre. For private operators, compact formats provide an opportunity to cost effectively access new micro-markets and respond to more local demand patterns.

Stakeholder interviews also described a shift from head-to-head competition toward complementary positioning, with operators differentiating to coexist and grow the category rather than recycle the same members. This is reflected in the creation of new formats and propositions that expand participation instead of trying to out discount a neighbour.

At the same time, stakeholders remained cautious about chasing trends too quickly, particularly where capital is limited or market fit is uncertain. The message from operators was clear: innovations must add long-term value for their members, not simply mirror industry fashion. We heard that independent operators often lead innovation, trialing new concepts at a smaller scale, refining what works and paving the way for wider uptake across the market.

Operators engineer retention through human support, data and early interventions

Stakeholder engagement and operator evidence show that retention is no longer a passive outcome but a deliberately engineered system. Operators across all segments are investing in structured processes that support members from the moment they join. This includes pre-first-visit contact, upwards of 30 early-stage touchpoints, behavioural Customer Relationship Management (CRM) nudges, and even biological-age or diagnostic assessments that feed into personalised plans. Early engagement is critical, with operators consistently reporting that drop-off risk is highest in the first few weeks, and that broadening usage – for example, combining gym, classes and swimming – significantly extends length of stay.

Community-building also plays a central role. Operators increasingly use pairing in group activities, social clubs and informal member meet-ups to strengthen belonging. Independents report some of the longest lengths of stay, often supported by a tight, actively managed system for tracking and responding to member no-shows and highly personalised communication. Public operators emphasise the power of human connection in their facilities, noting that “staff who know your name” remains one of the strongest predictors of sustained engagement.

05. Price and value

Cost pressures tighten margins and change consumer behaviour

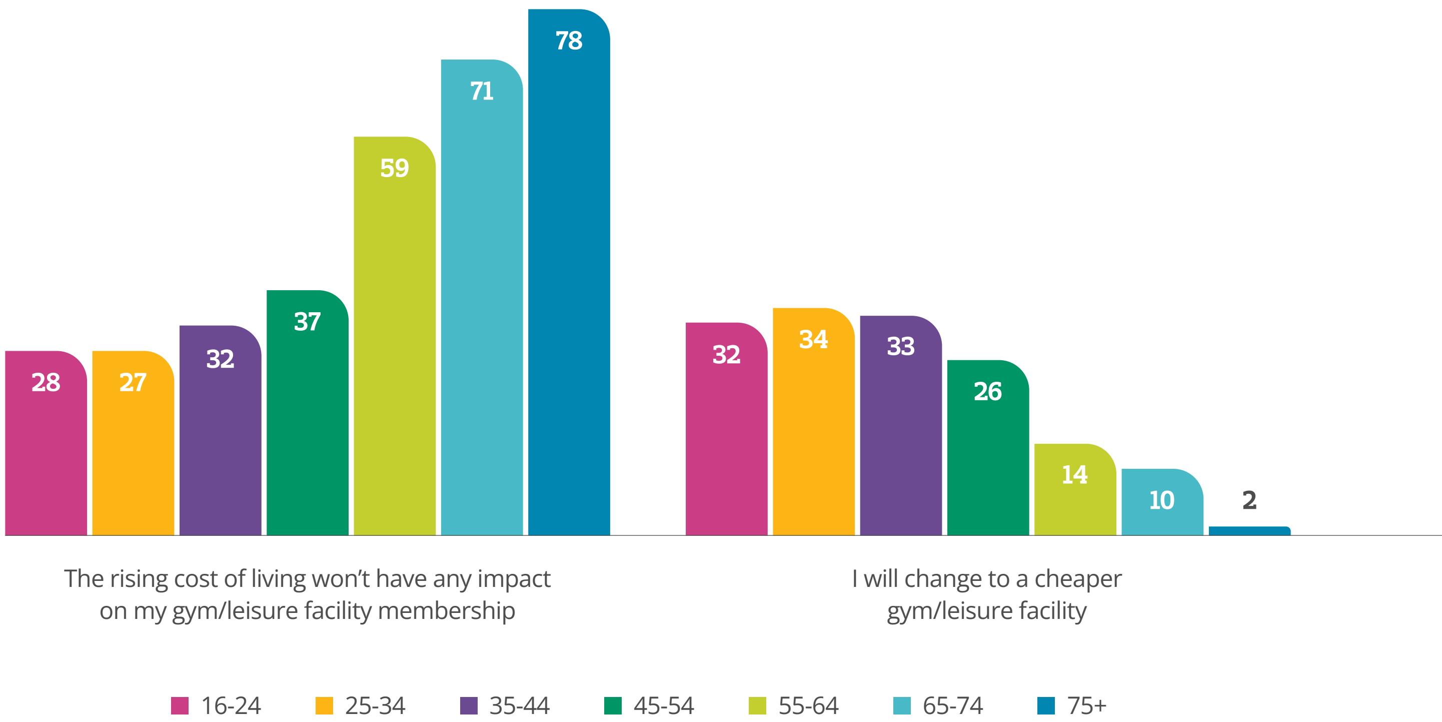
Operators continue to face sustained financial pressures, with energy, water, National Insurance, minimum-wage uplifts, VAT and business rates repeatedly cited through stakeholder engagement as the most significant cost headwinds.

These pressures are squeezing margins across all operator types, heightening the need for pricing flexibility, operational efficiency and clear proof of value – particularly in a consumer environment where budgets remain tight.

The consumer survey reinforces these operator concerns. The negative impacts of an increased cost of living are felt most acutely by younger and mid-life adults, who show a far greater likelihood of changing their membership behaviour when finances tighten.

Respondents aged 16–44 are more likely to switch to cheaper gyms, move to pay-as-you-go options, or cancel memberships altogether. Older adults, by contrast, report far less intention to change their behaviour, although a small proportion still anticipate needing to adjust.

Figure 24: Impacts of the rising cost of living on gym/leisure facility memberships by percentage of all respondents[42]



Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

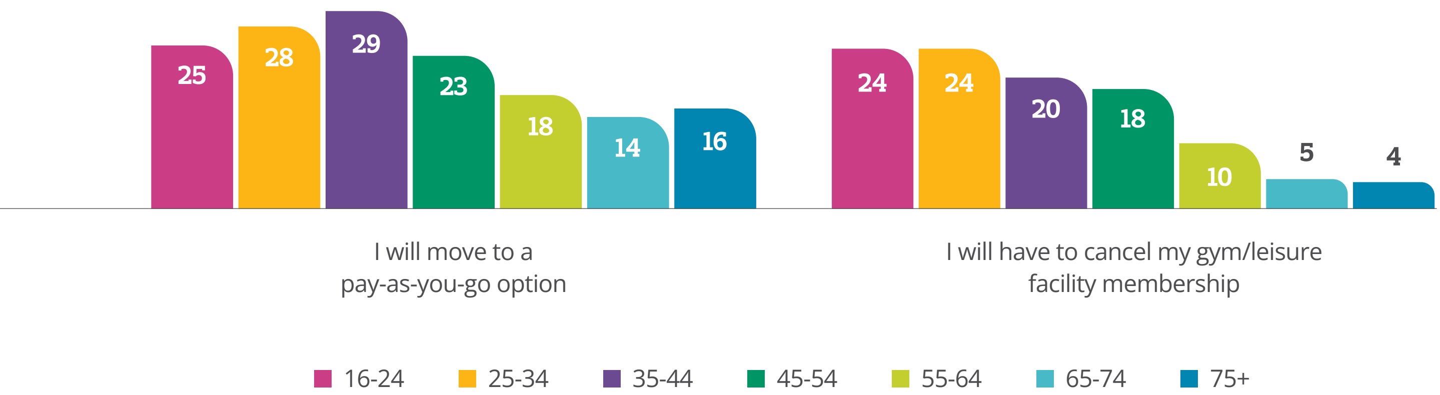
42. Consumer insight survey question: Which of the following impacts, if any, will the rising cost of living (e.g. increased energy bills) have on your gym/leisure facility membership? BASE = All respondents.

Cost-of-living impacts also differ by socioeconomic group. ABC1[43] respondents are more likely to say rising costs will not affect their gym or leisure membership, while C2DE[44] respondents show higher price sensitivity, indicating a greater likelihood of downgrading, shifting to pay-as-you-go or cancelling.

These differences reinforce the importance of affordable, flexible and clearly communicated value-led offers, especially for younger adults and lower-income groups.

Stakeholder discussions highlighted that independent operators, feel most exposed to small price movements, given their narrower margins and local competitive pressures. With public leisure operators facing a different set of constraints including: CPI/RPI-linked pricing, ageing estates and limited capital flexibility. All of which restrict their ability to respond quickly to rising costs.

Taken together, the operator and consumer evidence paints a consistent picture: cost pressures are reshaping both provider strategies and consumer behaviour, making affordability, value signalling and targeted pricing models more critical to sustaining engagement and membership throughout 2025 and beyond.



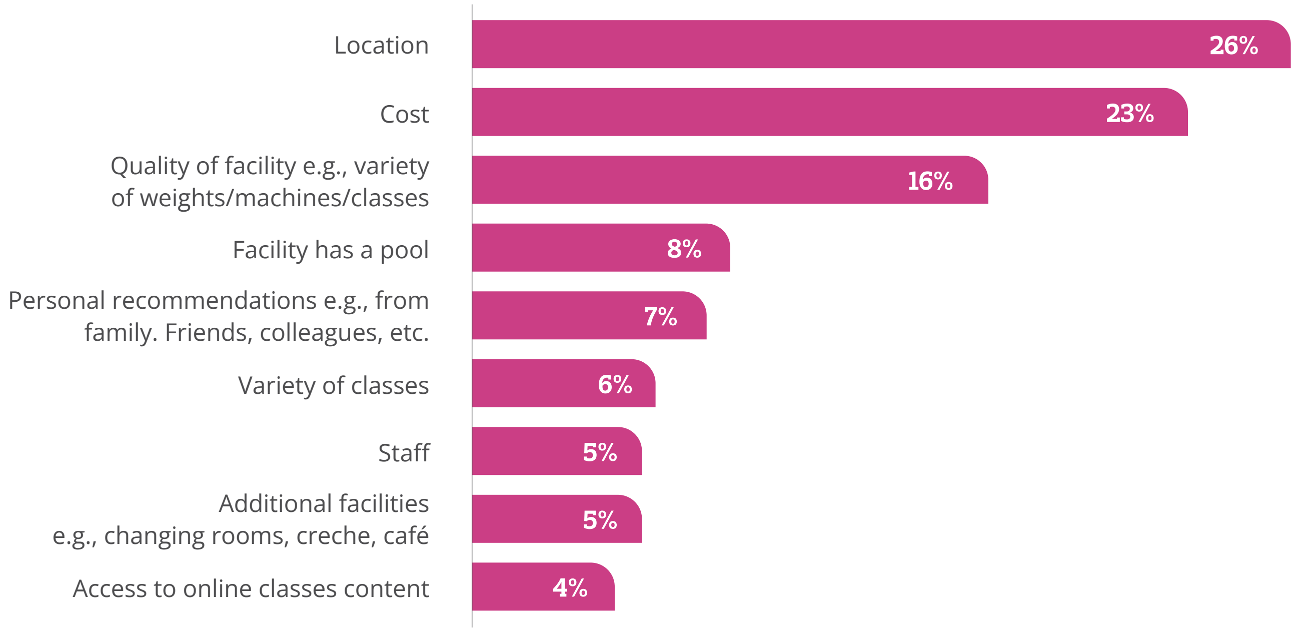
43. Consumer survey terminology definitions can be found in Appendix A.
44. Consumer survey terminology definitions can be found in Appendix A.

Value models continue to diverge

Value remains a core driver of consumer decision-making, and this year's findings show that value is increasingly interpreted emotionally, not just functionally. Stakeholders report that members accept price rises when value is visible – through clean and well-maintained facilities, fast equipment fixes, supportive staff interactions and environments that feel safe and welcoming[45].

Survey data mirrors last year's findings and shows that amongst all respondents, who are a member of a gym or leisure facility, location remains the single most important factor across all age groups when choosing their current gym or leisure facility (26%), followed by cost. Notably respondents aged 55–74 placed greater importance on having access to a pool as more than a third of respondents in this age group ranked a pool among their top three decision-making factors. In contrast, fewer than a quarter of 16–24-year-olds consider a pool important, underscoring generational differences in what constitutes "value".

Figure 25: Ranking of criteria considered important in selecting a specific gym or leisure facility (%)[46]



Different models demonstrate value differently

Different operator models demonstrate value in different ways: high value low cost (HVLC) operators focus on uptime[47] and price, premium operators on breadth of amenities and recovery services and public operators on staffed support, community feel and concessions.

Across demographics, however, a consistent theme emerges: feeling valued matters as much as what is offered.

Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

45. Despite cost pressures, the PureGym UK Fitness Report, December 2025 shows health and fitness remain a top-of-mind priority for many consumers, with the sector's perceived value evidenced in stable or rising engagement even as households manage tighter budgets. This underscores our finding that clear, visible value – not just a lower price – drives choice and stickiness.

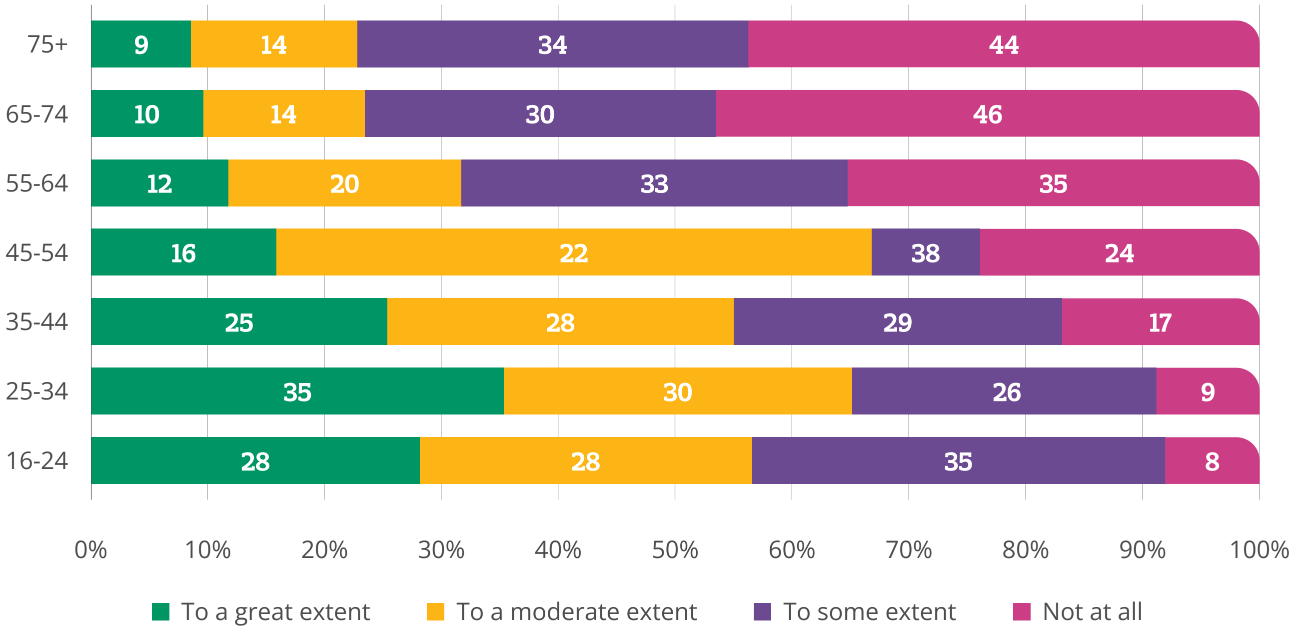
46. Consumer insight survey question: Please place the following statements in order of importance in your decision to join the specific facility you chose. BASE: All respondents who are a member of a gym or leisure facility.

Perceived value declines steadily with age

Survey responses to the question *"To what extent do you see value in a gym membership?"* shows that perceptions of value decrease as age increases. Younger adults (16–34) are the most likely to say they see value "to a great extent" or "to a moderate extent," whereas older adults become progressively less convinced. From age 45 onwards, the proportion who see value only "to some extent" or "not at all" rises sharply. Among those aged 65+, "not at all" becomes a notably common response.

This suggests that current value propositions resonate most strongly with younger users, while older adults perceive a weaker alignment between their understanding of what gyms offer and what they need or expect. Overcoming this age-related value gap is an opportunity for operators.

Figure 26: **To what extent do respondents see value in gym membership by age group**[48]



Gender differences are minimal, but socioeconomic differences are marked

Men and women report broadly similar perceptions of value, though men are slightly more likely to select the most positive and most negative ends of the scale. More meaningful differences emerge by socioeconomic group: respondents in ABC1[49] groups are far more likely to see strong value in membership, whereas C2DE[50] respondents are more represented in "some value" and "no value" categories. These findings reflect both affordability and accessibility pressures and differences in confidence and relevance.

Across all groups, the data reinforces the importance of flexible pricing, clear communication of value, and inclusive design that supports different life stages, abilities and expectations. This is particularly important as perceived value follows the same downward trend as likelihood of current non-members to join within the next six months – meaning that improving perceived value is likely tied to future membership growth, especially among older and lower-income groups.

Source: Savanta, ukactive, Grant Thornton analysis. Results are based on all respondents; 'Don't know' responses have been excluded from the analysis.

47. Uptime describes the extent to which facilities and services – such as gyms, studios, equipment, digital platforms, and access systems – are consistently available, functioning and ready for members to use.
48. Consumer insight survey question: To what extent do you see value in a gym membership? BASE: all respondents.
49. Consumer survey terminology definitions can be found in Appendix A.
50. Consumer survey terminology definitions can be found in Appendix A.

06. Technology and data

Hybrid success but integration problems limit impact

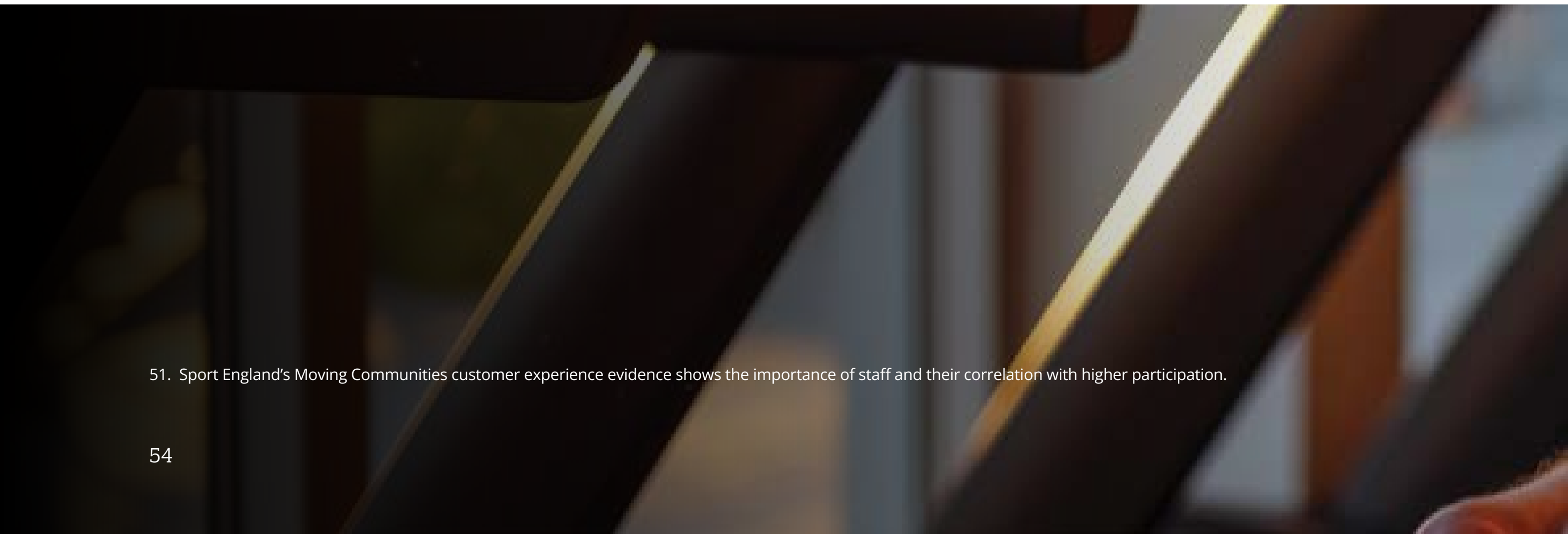
Alongside human-led approaches, technology and digital tools increasingly shape the gym and leisure facility ecosystem. Operators are adopting digital solutions such as AI assistants, automated access systems, lifeguarding analytics and personalised behavioural nudges that support member journeys. However, stakeholders stressed that digital tools work best when they complement, rather than replace, human support. Members continue to prefer human personal trainers over AI-generated plans, particularly for confidence-building and technique-focused guidance[51].

Stakeholders also noted that social media now plays a major role in shaping members' understanding of fitness, technique and health information. While platforms provide easy access to guidance, inspiration and community, they also expose members to inconsistent or misleading content. This increases the pressure on operators to provide clear, credible and accessible information inside facilities, helping members navigate conflicting messages and build confidence in their training.

Stakeholders also noted that while wearable technology has expanded members' awareness of health indicators and helped normalise the tracking of progress, the integration of data remains a significant challenge. Insights from wearables, apps, gym equipment and membership systems are often dispersed across multiple platforms, limiting operators' ability to provide a seamless, joined-up experience.

These integration issues are especially pronounced within the public leisure sector, where legacy estates and older membership systems make it difficult to unify data, digital access and online membership features. There have been significant steps taken in this area, which show the effectiveness of digital interventions and the potential of technology to reinforce behaviour change but there is still more to be done.

Taken together, these findings show that effective retention now relies on a hybrid model in which human connection, structured behavioural support and well-integrated technology operate in tandem. The operators who achieve the strongest retention outcomes are those who invest not only in digital capability, but also in the people-centred elements – welcoming environments, clear guidance, and personal support – that help members feel confident, supported and valued from day one.



51. Sport England's Moving Communities customer experience evidence shows the importance of staff and their correlation with higher participation.

07. Looking to the future

UK health and fitness in 2026

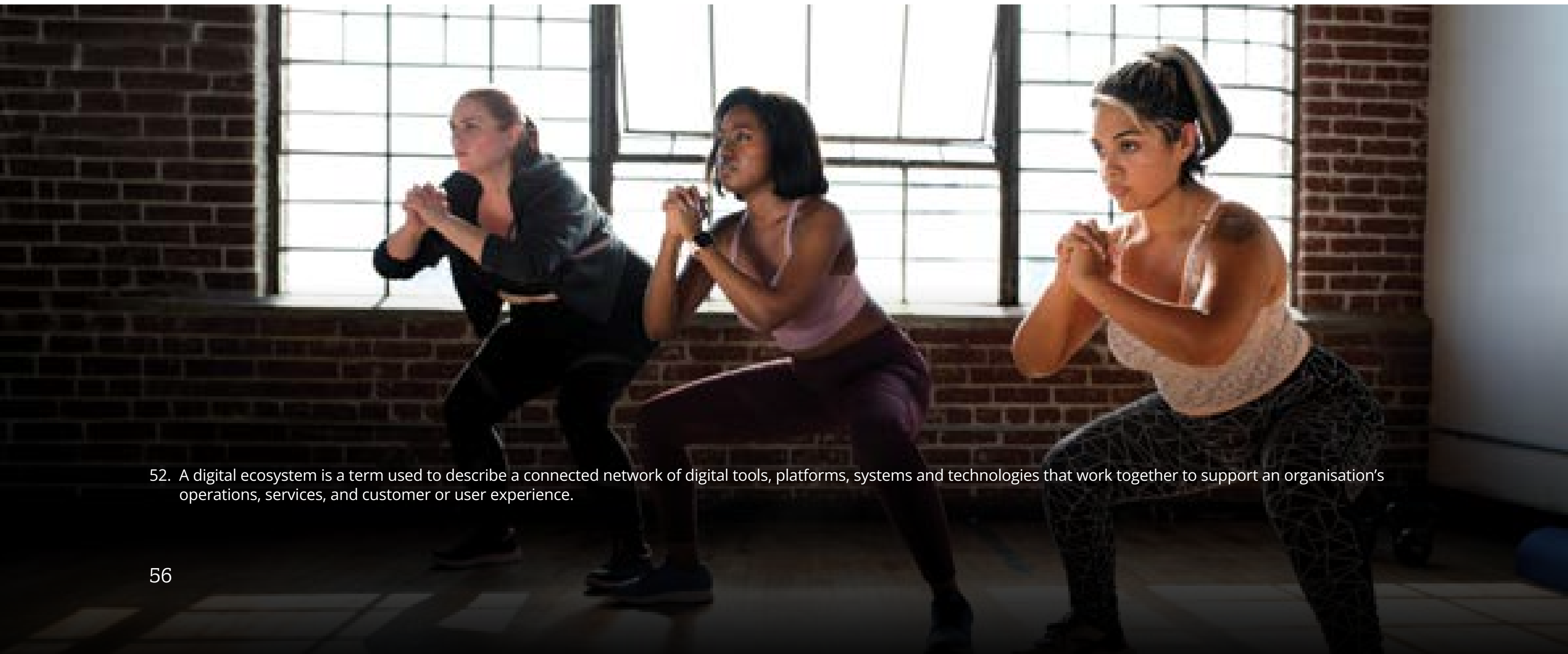
The sector enters 2026 on a strong footing

Across segments, productivity per site is rising, with pricing and offer-mix contributing to income growth as well as sheer member volume. Large private chains continue to benefit from scale, digital ecosystems[52] and experience investment, public operators are widening access and continue to fill capacity, and independents shine through on community and loyalty. Stakeholders note that independent operators feel cost pressures most acutely, with tighter margins and limited ability to absorb rising energy, staffing and financing costs.

Public operators also face a distinct cost challenge, with many managing an ageing facilities estate that requires ongoing investment to maintain quality and capacity. However, they also stress that when facilities fail it is often due to poor site selection or over-leveraging, not flaws in the subscription model – so real-estate discipline and conservative balance sheets remain the surest defence in a volatile macro environment.

Overall, the data shows a sector that is growing, diversifying and creating deeper value from each member and each facility. Growth is no longer just about opening more clubs – it is about creating experiences that people value, encouraging them to visit more often, and broadening the services offered once they are inside. This positions the sector well for continued growth, provided operators can keep improving value, widening access and adapting their offers to the needs of different groups.

Through consultations with industry leaders across the UK health and fitness market, a clear picture has emerged of both the opportunities and the challenges shaping the sector's next phase. Shifting consumer behaviours, rapid digital enablement, evolving business models and rising public-health priorities are driving important change.



52. A digital ecosystem is a term used to describe a connected network of digital tools, platforms, systems and technologies that work together to support an organisation's operations, services, and customer or user experience.

Looking ahead, several key trends are expected to define the market in 2026 and beyond:

01. A continued focus on health integration potential

The fitness sector is increasingly well positioned to play an important role in healthcare pathways; particularly in weight management, rehabilitation and mental-health support. As pressure on the NHS grows and preventative care becomes a national imperative, collaboration between health and leisure will continue to expand.

The opportunity is two-fold: improved health outcomes for communities and new, off-peak demand for operators. Realising this potential will require standardised referral routes, a shared language between healthcare and leisure and clear, condition-specific pathways – from metabolic health to post-stroke recovery – co-designed with clinical partners. Public leisure is well positioned to lead this integration but removing institutional barriers that limit partnership with private and independent operators will be critical to achieving true scale potential.

To fully support health outcomes, programming may also need to evolve. While strength training has grown appropriately, some stakeholders express concerns that cardiovascular training is increasingly under-served. Operators who restore balance (strength and cardiovascular, plus flexibility and skills) are better aligned with healthy ageing and longevity goals.

02. Pharmaceutical intervention and the rise of GLP–1 medications

The rapid uptake of GLP-1 weight-loss medications is only accelerating the need for closer integration between healthcare and the fitness sector. These drugs are now being considered alongside structured lifestyle plans to support individuals with type 2 diabetes and obesity-related conditions, increasing the importance of exercise and nutrition in achieving sustainable results.

ukactive's joint report with Les Mills on GLP-1 medications highlights the significant risk of lean-mass loss – estimated at between 20% and 50% of total weight lost – and sets out clear recommendations for embedding strength training within wraparound support models. This reinforces the sector's role in prevention, rehabilitation and long-term condition management.

The implication is clear: as GLP-1 use grows, gyms and leisure operators have both an opportunity and a responsibility to act as essential partners in safe, sustainable weight-loss journeys. Delivering on this will require accessible, strength-led programmes, sensitive and inclusive member communication, and close collaboration with healthcare partners to ensure consistent, evidence-aligned messaging.

03. Evolving the sector's social value narrative

Social value is being evidenced more consistently and credibly, so that operators, partners and policymakers can see the collective contribution to health, wellbeing and community outcomes – not only throughput and income. This year's report reinforces the need to anchor reporting in established frameworks, and to present results in a way that is comparable across public, private and independent providers. Doing so strengthens the sector's case for investment and policy support, connecting participation with clear social and economic value, and supporting prevention, condition-management and healthy-ageing narratives that resonate beyond the fitness industry.

04. Balancing costs, value and consumer expectations

Rising operating costs will continue to shape the sector in 2026, with energy, staffing, business rates, VAT and wider cost-of-living pressures all squeezing margins across operator types. Operators emphasised that these cost headwinds make income growth essential, reinforcing the importance of pricing discipline, upgraded value propositions and operational efficiency.

For all segments, the strategic response will involve refining cost structures, improving operational efficiency, and differentiating offers so that value remains evident even when discretionary spending is under pressure.

05. Demand driving innovation and offer differentiation

Demand rather than supply is shaping sector performance more than ever, and operators will continue to differentiate to coexist. New formats and propositions are emerging, responding directly to how consumers now choose to engage with health, fitness and wellbeing. The landscape continued to evolve throughout 2025, with several themes becoming firmly established:

- Strength training and inclusive competitive formats have sustained their rise.
- Health, fitness and wellbeing remain non-negotiable for younger generations, who increasingly view activity as a foundational part of their lifestyle.
- Motivations are expanding beyond physical health to include social connection, identity and mental wellbeing – particularly for Gen Z. Operators are responding by creating more engaging social spaces that extend beyond fitness alone, fostering strong community ties and aligning experiences with these shifting priorities.

To remain competitive and appeal to a broader demographic, providers will need to continue prioritising diversity and inclusivity within their offering. This includes expanding programme options to reflect a wider range of goals and preferences, while ensuring environments remain welcoming, supportive and socially engaging.

Provision for children and young people is also expected to grow. Earlier supervised entry, youth competitions and school-age formats are becoming more common. Models will need to combine robust safeguarding, staff training and age-appropriate programming with formats that build foundational movement skills and strengthen loyalty from first contact.

Looking ahead, 2026 will reward clear value proof. This is particularly important for older adults, many of whom question the relevance of existing offers.

06. Technology, AI and integrated digital ecosystems

Technology and AI are set to further augment the sector, enhancing both member experience and operational efficiency. The next phase of digital progress will depend on greater integration – ensuring that apps, wearables, booking systems, equipment data and health records can interact more seamlessly.

Operators who integrate these tools cohesively – not as standalone features – will be best placed to meet rising expectations around personalisation, convenience and accountability.

08. About us

This report is testament to sector-wide collaboration and the collective commitment to improving the industry's reporting and insight.

The use of consistent, regular and credible datasets covering public, private and independent operators – combined with consumer polling and market performance data – provides the strong analytical foundation our sector requires, and deserves, to grow and succeed.

We want to say thank you to all contributing operators and Leisure Management System providers for supplying data, to our sponsors for their ongoing support, and to the stakeholders who contributed to the interviews and surveys, as well as members of our steering committees for their guidance throughout the development and delivery of this report.

About ukactive

ukactive is the UK's trade body for the physical activity sector, bringing together around 4,000 member organisations and partners in our shared ambition to get More People, More Active, More Often. From gyms, leisure centres, studios, sports bodies and other activity providers, to major health bodies, consumer brands, tech firms and equipment manufacturers, our community collaborates across the private, public and third sectors. ukactive facilitates high-impact partnerships, conceives and drives breakthrough campaigns, conducts critical research and lobbies the Government to recognise the power of the physical activity sector to address today's biggest issues – including reducing the burden on the NHS and social care, improving workforce health to grow the economy, revitalising our high streets, reducing crime, and tackling loneliness.

About 4GLOBAL

4GLOBAL is a data services and technology company, empowering clients with actionable insights to maximize health and social benefits derived from physical activity. 4GLOBAL acknowledges the power of physical activity to transform lives – even save lives – and see our purpose as finding new and exciting ways to get people active through the intelligent use of data from across the sector.

4GLOBAL's DataHub is the largest global repository for sport and physical activity participation data, integrated and enhanced through a suite of business intelligence solutions. The DataHub provides actionable insights across the entire ecosystem, including government, cities, federations, and private and public activity providers. Currently, it is tracking the activity patterns of millions of people through billions of datapoints and is still growing.

About Sport England

Sport England is a public body and invests up to £300 million National Lottery and government money each year in projects and programmes that help people get active and play sport. It wants everyone in England, regardless of age, background, or level of ability, to feel able to engage in sport and physical activity. A lot of its work is specifically focused on helping people who do no, or very little, physical activity and groups who are typically less active.

About Moving Communities

Moving Communities is a data service that measures public leisure's contribution to active communities in England. It provides real-time views of local authority facility performance that explores financial performance alongside understanding how effective the service is and for whom, and its impact on local communities. It combines the expertise of Sport England with a group of partners including Leisure net Solutions, the Sport Industry Research Group at Sheffield Hallam University, 4GLOBAL and Quest. Together, Moving Communities provides live data based on the largest data set ever gathered for the local authority leisure sector.

About Grant Thornton UK Advisory & Tax LLP

Grant Thornton UK is an audit, tax and advisory firm that helps organisations navigate complexity, make confident decisions and achieve sustainable growth. Led by nearly 300 partners and supported by around 5,000 people, the UK firm combines deep technical expertise with a practical, human approach to solve real business challenges. Grant Thornton works with clients to unlock growth, protect and create value, restore stability and adapt for the future in a fast-changing digital environment. As part of a global network of 76,000 people spanning 150 countries, the firm brings international capability alongside strong local insight, delivering high-quality, consistently effective advice tailored to each client's pace and priorities.

09. Appendices

Appendix A: Methodology and terminology

Details on operator data

Operator analysis terminology

Clubs: Fully operational sites in the UK that include at least a health and fitness gym equipped with resistance and/or cardiovascular equipment. The site must be accessible to the public through membership and/or pay-as-you-go options. This definition excludes facilities such as schools, outdoor gyms, yoga or Pilates studios, studio-only sites and swimming-pool-only venues. It also excludes education facilities such as university gyms that may be open to the public only for very limited periods of the day.

Independent operators: Gym or leisure facility that is commercially owned and commercially managed and has less than a four site portfolio.

Private operators: Gym or leisure facility that is commercially owned and commercially managed and has four or more sites within their portfolio.

Public operators: Gym or leisure facility that is local authority owned. Includes all management types.

Membership: Total number of active members at the end of the submission period. Includes all memberships for individuals aged 16 or older, including monthly Direct Debits and fixed-term memberships. Excludes day passes and fixed-term memberships lasting less than 30 days. Excludes swim only memberships.

Membership income: Total membership income for the month, including Direct Debit income, slider payments, pro-rated annual payments, and gross income (inclusive of VAT). Joining fees and secondary income are excluded. This encompasses payments from all members, regardless of their membership status at the end of the month. Please note this excludes income from day passes and fixed-term memberships lasting less than 30 days.

Total income: Combined revenue from membership income and secondary revenue streams, exclusive of VAT. This measure excludes income from activities that fall outside of gym or leisure facility provision, such as casual swimming or court hire at standalone pay as you go venues, but includes revenues associated with gym based activity, including personal training, pay-as-you-go exercise classes, day passes, fixed term memberships lasting less than 30 days, and other ancillary services delivered within the facility.

Total throughput: The total number of visits to facilities by users aged 16 or older during the most recently completed quarter, excluding throughput from non-gym and non-studio activities (e.g. swimming). Multiple entries by the same user within a single day count as one visit. Visits spanning midnight are recorded based on the day of entry or booking start time.

Operator data methodology

A comprehensive dataset was downloaded from Sport England's Active Places Power (APP) platform on 2 March 2026, representing the most up-to-date national facilities audit for England.

This dataset serves as the primary base for the analysis of club data:

- Additional granular APP files were incorporated to identify available facility types at each site, including: Health and fitness gyms; Swimming pools; Studios; Artificial Grass Pitches (AGPs); and Sports halls.
- The dataset was filtered according to criteria based on status, access type, ownership/management type and facility types.
- Data for key metrics (members, membership income, total income, and throughput) was gathered from the following sources:
  - Private Sector: Private Sector Benchmarking initiative (in partnership with ukactive).
  - Independent Sector: Data collected from three leading Leisure Management Systems (LMS) – ClubRight, GymOS, and ClubWise).
  - Public Sector: Data from the GLOBAL's DataHub, serving as the foundational dataset for Sport England's Moving Communities platform.
- Average per club figures for each metric were calculated and segmented by public, private, and independent sectors. These averages were then multiplied by the total estimated count of sites in the UK to estimate the overall UK figures for each metric.
- The methodology was reviewed and validated by the Sport England/Active Places Power team to ensure accuracy and consistency.

Operator analysis caveats and limitations

- The majority of historical data reflects the snapshot extracted for last year's report on 21 February 2025. Historical figures are therefore consistent with the figures published in last year's report.
- Due to new data some historic figures (income) have been updated; as a result, they may differ slightly from figures in last year's report.
- Data quality and completeness continue to improve as operators refine their reporting and as datasets undergo ongoing validation, standardisation and cleaning. As a result, historical snapshots may be subject to minor adjustments over time which are not reflected in this report.

Any operator movement between Private (4 or more clubs) and Independent (3 or less clubs) sector through the growth or reduction of clubs above or below the threshold will not be reclassified in the historical data, however, may show as growth or reduction presented in this report, if moving between classifications.

- The UK population used to calculate participation rates are the annual UN population estimates, selected to align with both last year's UK Health and Fitness Market Report and European reporting conventions:

Year	UN UK population estimate
2023	67,736,802
2024	67,961,439
2025	68,180,606

- The differences observed between year-on-year membership growth and the growth rates for income and throughput should be interpreted with care, as they are driven primarily by the different measurement methodologies used for each KPI and by seasonal performance dynamics that affect operator segments in different ways:
  - Membership growth is measured on a Q4-to-Q4 basis, capturing the change in total members at the end of each year.
  - Income and throughput growth are measured across the full calendar year, and therefore reflect performance across all four quarters, including any seasonal fluctuations.across the full calendar year, and therefore reflect performance across all four quarters, including any seasonal fluctuations.

As a result, these indicators respond differently to changes in performance throughout the year:

- Public operators saw stronger membership retention in Q4 of 2025 compared to 2024, meaning the Q4–Q4 comparison shows relatively higher membership growth even though income and throughput, measured across the full year, grew at a slightly lower rate.
- Private and Independent operators experienced a sharper slowdown in membership during the latter part of the year in 2025 compared to 2024. Because Member Growth relies specifically on the Q4 snapshot, this late-year softening suppresses the membership growth figure, whereas income and throughput, which capture stronger activity earlier in the year, show higher overall growth.

In effect, the apparent divergence between these KPIs does not necessarily indicate inconsistent performance trends. Instead, it reflects seasonal patterns in membership behaviour combined with the distinct measurement windows used for each KPI. These differences should therefore be recognised as a methodological limitation when comparing growth metrics directly.

- Independent operators present specific challenges for data accuracy and completeness. This segment of the market is highly dynamic, with small sites opening, closing or changing ownership frequently. As a result, maintaining an accurate and up-to-date database is inherently difficult. Many independents have limited digital presence, inconsistent contact details, or websites that are not regularly updated, which reduces the ability to verify changes promptly. Although every effort has been made to validate and refresh the dataset, there remains a possibility that some independent facilities are not captured in this report or that some site details reflect a time-lag between real-world changes and updates to source systems.

Details on social value data

This Social Value (SV) methodology sets out how the social, health and wellbeing impact of sport and physical activity is calculated across the sector. The approach follows 4GLOBAL's standard Social Value framework, which is aligned to the Sport England national social value model (SVC4) released in 2025. The outputs presented in the market analysis represent the attributable social value generated within facilities during the 2025 calendar year. Attributable value refers specifically to the portion of total activity-related benefits that can be directly linked to participation within facilities, as opposed to all activity undertaken in the wider community.

The methodology is built on individual-level participation data where available, supplemented by modelled estimates for datasets that do not contain demographic or usage detail. It provides a consistent, evidence-based way to estimate the health and wellbeing benefits generated through sport and physical activity across private operators, public operators and independent facilities.

Social value analysis terminology

The social value approach used in this analysis aligns to the Sport England national social value model (SVC4), which distinguishes between primary and secondary value generated through participation in sport and physical activity. Primary value relates to improved wellbeing for individuals, while secondary value reflects wider health and societal cost savings, consistent with HM Treasury Green Book wellbeing guidance.

Please note terminology definitions for Operator data also apply here.

Full Social Value (Gross): The total social value generated by individuals through all their sport and physical activity – both inside and outside facilities – within the analysis period.

Attributable Social Value (Net): The proportion of total social value that can be directly attributed to participation within facilities (e.g., gym visits, classes, swimming sessions). This is calculated using in-facility deflators derived from Sport England's Active Lives Survey[52].

53. In this report, only health and fitness activities are included within the calculation of attributable social value. Activities such as swimming and sports hall usage are excluded, even though they form part of the wider public leisure offer.

Active/Fairly Active/Inactive Classification: Participants are classified as:

- **Active:** Adults doing ≥150 minutes/week MVPA; children ≥60 minutes/day.
- **Fairly Active:** Adults doing 30–149 minutes/week; children 30–59 minutes/day.
- **Inactive:** Below these thresholds.

Facility-specific monthly thresholds are applied using SVC4 methodology.

Known Users (Members): Participants with unique identifiers (e.g., membership ID), allowing direct calculation of participation duration, activity type and frequency.

Casual/Unknown Users: Participants without identifiable demographic or attendance records (e.g., pay-as-you-go visits, school bookings). Social value is modelled using throughput-to-participant conversion ratios derived from national DataHub datasets.

Deflators: Adjustments that ensure value is not over-estimated: in-facility deflators to account for activity done outside centres, Multi-site usage deflators to avoid double-counting when participants use more than one centre.

Wellbeing outcomes: Wellbeing outcomes represent the direct, immediate benefits to individuals' life satisfaction that arise from being physically active i.e. how physical activity improves people's quality of life.

Health outcomes: Health outcomes represent the indirect, longer-term benefits to society and the healthcare system that arise from reduced risk of disease and reduced service usage i.e. the avoided costs and disease-risk reduction associated with being active.

Social value data methodology

The analysis uses the standard 4GLOBAL Social Value framework, consistent with the Sport England SVC4 national model for sport and physical activity. This ensures results are robust, comparable and anchored to nationally recognised wellbeing and health valuation evidence.

- Three datasets underpin the analysis:
  - Private multi-club operators: 1,097 sites, individual-level data including age, gender, activity type, visit frequency and duration.
  - Public operators: 917 public leisure sites with demographic and activity level data collected through live integrations.
  - Independent operators: 626 sites providing annual visit volumes through sector benchmarking, allowing modelling of participation in absence of individual-level data.
- Data represents the 2025 calendar year.
- Calculation of Social Value for Known Users.

  For operators providing individual-level data (public and private sectors):

  - Classify participant activity levels using in-facility adjusted SVC4 thresholds.
  - Assign demographic segments (age, gender) relevant to wellbeing and health valuation.
  - Calculate wellbeing value using SVC4 WELLBY-based valuation of life satisfaction improvements.
  - Calculate health value by estimating reduced cases of 14 major health conditions and reduced healthcare usage.
  - Apply deflators to calculate attributable (in-facility) social value.
  - Aggregate individual values to monthly and annual totals at site, operator and sector level.

- Calculation of Social Value for Casual Users.

  Where demographic information is unavailable, SVC4's modelling approach is applied:

  - Convert total throughput into estimated unique users using ratios derived from pay-as-you-go and non-member cardholders.
  - Allocate unique users into activity-level categories (active/fairly active/inactive) based on member distributions.
  - Apply average per-person SV values for each activity category.
  - Apply the same in-facility and multi-site deflators.
  - Aggregate casual social value with member values for total site-level SV.

- Methodology for Independent Operators.

  Where operators provide only total visits:

  - Throughput is converted to participation using national DataHub averages for activity duration, demographics and usage patterns.
  - Social value outcomes are estimated using 4GLOBAL's predictive Social Value Calculator (SVC), aligned with the SVC4 model.
  - This produces robust but modelled social value estimates across wellbeing and health outcomes.

- Extrapolation to UK Market.

  Average attributable SV per club is calculated for each operator type and then extrapolated to the estimated total UK market size:

  - **Private clubs:** ~£1.8m SV per site annually.
  - **Public operators:** ~£1.5m per site.
  - **Independent operators:** ~£480k per site.

Social value analysis caveats and limitations

While the methodology is robust and aligned with national standards, several caveats should be noted:

- **Year-specific results:** Results reflect the 2025 calendar year only; variations in behaviour or external factors (e.g., seasonality, economic changes) are not modelled beyond this period.
- **Cross-operator duplication:** Individuals may appear in multiple operator datasets and are counted separately because unique IDs cannot be matched across operators.
- **Modelled estimates for independent operators:** Independent operator SV relies on modelling assumptions rather than individual activity records. These estimates are robust but not as granular as member-level calculations.
- **Updated SVC4 methodology:** SVC4 values cannot be directly compared to earlier SVC versions due to:
  - Additional health outcomes (e.g., more cancers).
  - Updated risk-reduction evidence.
  - Adoption of WELLBY for wellbeing valuation.
  - Revised in-facility and multi-centre deflators.
  - Exclusion of community development outcomes previously included.
- **Participation thresholds:** activity levels are inferred using SVC4 thresholds adjusted for in-facility participation, meaning results rely on assumed proportions of activity undertaken inside vs. outside facilities.
- **Causal attribution:** the methodology captures associative rather than fully causal links between activity and outcomes, in line with standard national practice.
- This analysis is not directly comparable with Sport England's Social Value figures, as it uses a different facility scope and does not include children and young people; as a result, the number and mix of sites differ, and the outputs will not match those produced through the Sport England methodology.

M&A activity in the UK health and fitness market in 2025

- Includes only UK-based targets.
- Includes deals within the Health and Fitness market on gym or leisure facilities that are inclusive of various physical activities, including those outside of strength and/or cardio training such as swimming and rock-climbing facilities.
- Includes both majority and minority type investments and target operators of any size (at least one club).

M&A analysis caveats and limitations

A transaction identified during the initial deal scan was excluded from the M&A dataset on the basis that the target facility did not meet the report's definition of a gym or leisure facility. Qualifying sites must include a health and fitness gym with resistance and/or cardiovascular equipment and be accessible to the public through membership or pay-as-you-go access. Facilities operating primarily as activity-specific venues (such as climbing centres or single-discipline sports sites) fall outside this scope. Excluding this transaction ensures that the analysis remains consistent with classification standards and comparable with previous reporting years.

Details on Consumer Survey data

Consumer survey terminology

Gym or leisure facility: Any operator with the necessary facilities for strength and/or cardio exercises and/or classes in the public or private sector.

Health condition: Inclusive of any health condition that could be categorised within the following: cancer; cardiovascular disease; musculoskeletal conditions; respiratory disease; digestive disease; neurological disorder; mental health conditions; diabetes and kidney conditions; skin and subcutaneous disease; sense organ disease; other disease.

Higher socio-economic groups (ABC1): "ABC1" refers to a demographic and socioeconomic segment encompassing the three highest social and economic groups in the UK. These individuals typically possess higher levels of education and hold better-paid positions compared to those in lower socioeconomic groups. This term is frequently used in marketing and consumer research to understand the purchasing patterns and behaviours of individuals within these groups.

Lower social-economic groups (C2DE): "C2DE" refers to a demographic and socioeconomic segment encompassing the three lowest social and economic groups in the UK. This term is frequently used in marketing and consumer research to understand the purchasing patterns and behaviours of individuals within these groups.

Physical activity: Any voluntary movement produced by skeletal muscles which requires energy expenditure. This encompasses any activity at any level of intensity.

Consumer survey methodology

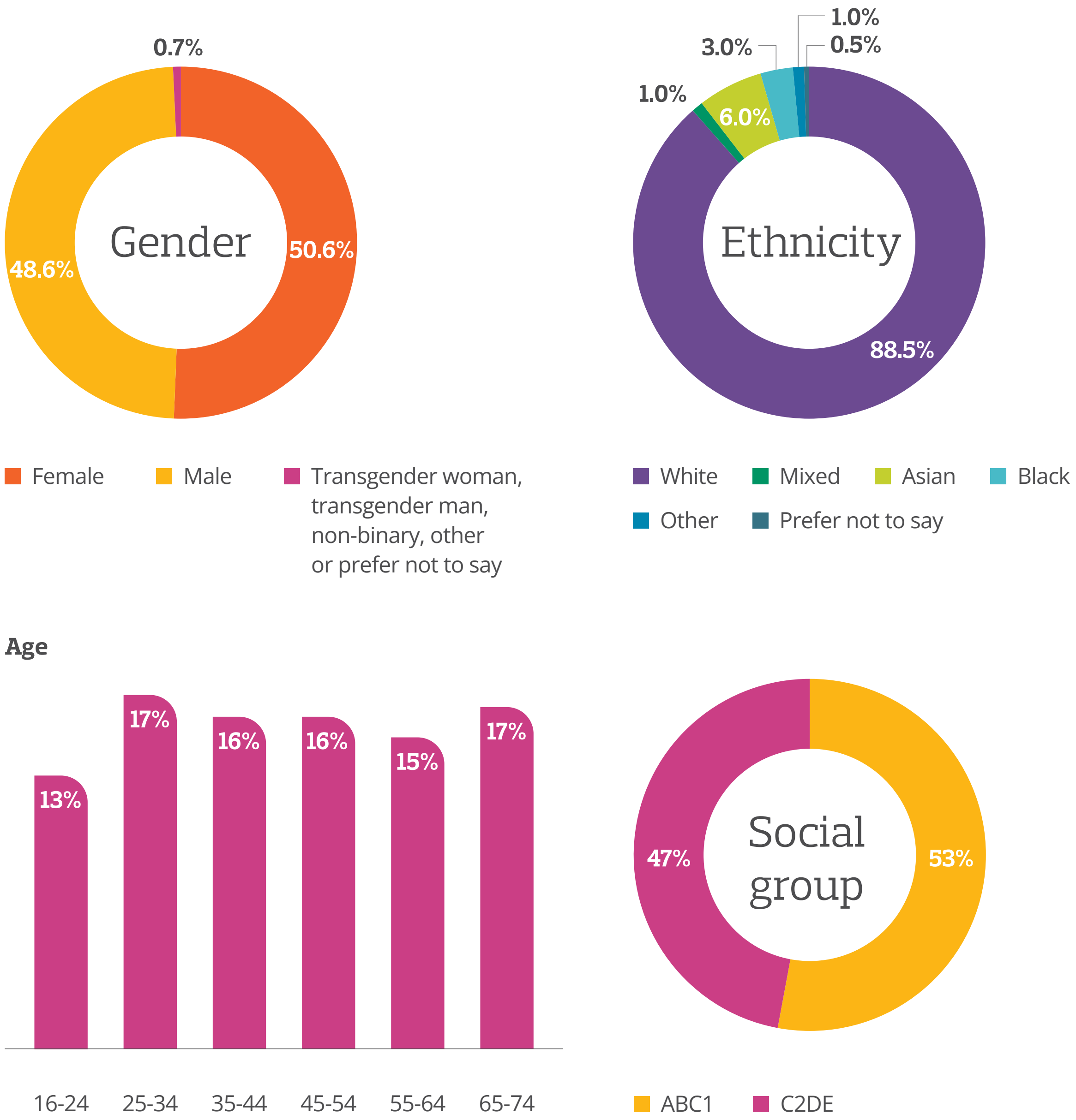
The survey was conducted across four waves during the year to mitigate against seasonality of results. Results presented in this report are aggregated averages of the data collected across each of the four waves.

During 2025, Savanta conducted an online consumer survey across four waves, each delivered in a different quarter of the year (January, April, July and September). The survey was designed to provide a deeper understanding of how the UK population engages with the fitness industry, exploring topics such as activity levels, barriers to participation, and how these vary across different population groups.

Consumer insight analysis is based on approximately 8,000 survey responses collected across four waves of the ukactive consumer survey, with around 2,000 participants responding in each wave. Although the sample was representative of the UK adult population, findings should be interpreted in the context of the sample size. These insights provide a strong basis for understanding key trends and, when considered alongside other relevant data and analysis, can support comprehensive decision-making.

Figure 27: Overview of Consumer Survey Sample Methodology (%)

An online survey was conducted across four waves in 2025 (January, April, July and September), providing a nationally representative sample of UK adults aged 16+. The sample was representative by age, region, gender, and social grade. Each wave achieved a sample size of over 2,000 respondents (n > 2,000).



Source: Savanta, ukactive, Grant Thornton analysis.

Consumer survey data caveats and limitations

- Although the sample was representative of the UK adult population, findings should be interpreted in the context of the sample size.
- Percentages may not sum to 100% because of rounding conventions or the inclusion of questions that permitted respondents to choose more than one option.
- The consumer insights presented here reflect the responses of the survey sample. They have not been extrapolated to generate national-level figures, rather, to understand trends and attitudes.
- 'Don't know' responses have been excluded from the analysis.

Location	% of consumer from each region
Northern Ireland	3%
Scotland	8%
North West	11%
North East	4%
Yorkshire & Humberside	8%
Wales	5%
West Midlands	9%
East Midlands	7%
South West	9%
South East	14%
Eastern	9%
London	13%

Source: Savanta, ukactive, Grant Thornton analysis.

Desktop research

Data sources were, amongst others:

- Mergermarket, Pitchbook, Orbis, CIQ, Company websites/press releases, Annual reports, ONS, GOV.UK, Sport England and other publicly available information.

Market–expert insight

- Series of stakeholder consultations with industry experts; comprised of 32 individuals.
- Stakeholder engagement included a wide range of one-to-one interviews with representations across public, private and independent operators, suppliers, analysts, subject matter experts and sports councils operators, supplemented by a structured written survey to capture additional insights in a consistent format.
- Together, these methods provided a rich, triangulated evidence base, enabling nuanced insights, the testing of emerging themes, and representation of the diversity of the market.

Further market report methodology

Quality of data sources

- Information in this report has not been independently verified or audited.

Presentation and reference of figures

- Figures are typically rounded.
- All financial figures are presented in GBP, unless stated otherwise.
- All figures refer to 2025 operations, unless stated otherwise.

Revenue recognition

- Revenue figures are in accordance with applicable accounting standards.

Notes

10. Contacts

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