



More people
More active
More often



UK Health & Fitness Market Report 2025

The UK's first market report showing quarterly trends from the health and fitness sector's most authoritative dataset.

Public | Private | Independent | Consumer | Market performance

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Introduction

The UK Health and Fitness market is demonstrating remarkable resilience and growth, exceeding post-pandemic expectations.

This inaugural UK Health and Fitness Market Report is a collaboration between ukactive, Sport England, 4GLOBAL and key operators in the private, public and independent market, with analysis from Deloitte. Historically, the industry has lacked a unified view of its performance. This report was commissioned by ukactive to address this critical need by providing the most authoritative view of the sector's performance to date. For the first time, data from commercial, public, and independent operators has been consolidated to create this accurate picture of the market to inform strategic decisionmaking for operators, policy makers and investors.

The data powering this report has unrivalled sector coverage. Sport England's Active Places Power platform forms the base of site based analysis alongside ukactive's Private Sector Benchmarking project (private operator metrics); data collected from three leading Leisure Management Systems (independent operator metrics); and 4GLOBAL's Moving Communities data (public operator metrics). The result is a sample size of 75%, 77% and 74% across the private, independent, and public operator sectors respectively, providing a high level of market coverage from which data could be extrapolated (see Methodology for details). Operator data is supplemented by ukactive's Consumer Engagement survey data, providing insights into consumer behaviours and trends. Driven by access to unprecedented operator and consumer insights data, analysis suggests a resilient market with robust growth metrics and diversified offers which capitalise on emerging consumer trends.

The analysis shows:

- **Growing membership and revenue:** Membership grew by 6.1% in 2024 compared to the previous year, reaching 11.5m members. Total income also increased by 8.8% reaching £5.7bn.
- A **penetration rate** of 16.9% to rival the highest performing European markets.
- **Expansion of Low-cost operators:** Low-cost operators have capitalised on growing demand from price sensitive consumers.
- **Mid and premium market operators** have sought to improve their value proposition, looking to capitalise on a shift in the relative value consumers are placing on fitness.
- **Public sector operators** are seeing continued market consolidation and are focused on improving efficiencies and increasing utilisation rates.
- **Technology enabled:** Technology is seamlessly integrated into the fitness journey, offering personalised experiences and data-driven insights.
- **Investment landscape:** Significant M&A activity in 2024 highlights investor confidence in the sector's long-term growth potential, with both UK and international players seeking expansion opportunities.



- **Ongoing cost pressures:** There remain underlying cost pressures due to inflation, rising operating costs, and policy changes.
- **The Rise of the Experience Economy:** Fitness facilities are transforming into vibrant social hubs, fostering community and offering diverse experiences.
- **Generational shift:** Younger generations are demonstrating higher levels of physical activity and gym membership, indicating a shift in societal priorities towards health and wellbeing and suggesting that for younger people, gym membership is essential.
- **Social Value contribution:** The industry continues to play a crucial role in delivering health and wellbeing outcomes promoting active lifestyles and contributing to preventative healthcare strategies.

Deloitte

Foreword

The UK Health and Fitness market is a testament to the power of resilience and adaptation. Despite facing unprecedented challenges in recent years, the sector has not only recovered but thrived, charting an impressive growth trajectory that underscores a fundamental shift in societal priorities towards health and wellbeing.

ukactive and Sport England

We are thrilled to be publishing the first annual UK Health and Fitness Market Report, bringing together data from ukactive's Private Sector Benchmarking project, Sport England's Moving Communities service, 4GLOBAL's Data Hub, and from Leisure Management Software providers, to offer a full and accurate view across the private, public and independent parts of the sector across all four home nations.

Significant effort from many stakeholders has driven an improvement in the quality and regularity of sector data, reporting and insights over the past few years, and this report represents the coming together of that work. But this is just the start. With quarterly insights in addition to the annual view, analysis linking consumer trends with business performance and alignment with the reporting carried out by Deloitte across the whole of Europe, this report provides a reliable, timely and in-depth view of the sector's performance.

That view is a positive one. Consumer demand is increasing as physical and mental wellbeing become of increasing importance, and physical activity is recognised more and more as a necessity for maintaining wellness. These local facilities provide accessible opportunities within local communities for people to get involved in sport and physical activity to drive the active wellbeing agenda. That demand is also translating into growth for businesses across all parts of the sector, even in the face of higher operating costs and a challenging operational environment. At a time when Government is in the pursuit of economic growth, this is a sector delivering just that through assets which form a vital part of the fabric of our villages, towns and cities.

And that growth is not only directly through the performance of businesses up and down the country, but also through improving the health of the nation. Whether that is by delivering primary prevention through accessible and high-quality facilities in local communities, or providing programmes to help people managing a long-term condition, the savings this sector is making for the NHS are huge. Not only that, but in a period of high levels of absenteeism and long-term sickness plaguing the workplace, the services these facilities and the workforce within provide have huge returns for productivity in businesses across the nation.

Our roles and responsibilities

ukactive – 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.

4GLOBAL – Provided all sector data as the data intelligence partner of Sport England's Moving Communities and ukactive's Private Sector Benchmarking projects.

Deloitte – Provided M&A data, analysis and interpretation of all data and report writing.

Consumer demand is increasing as physical and mental wellbeing become of increasing importance.

But there is so much more scope for this sector to grow. According to Sport England's Active Lives Survey, a quarter of the population is currently inactive, averaging less than 30 minutes of exercise per week. Furthermore, that data shows that many longstanding inequalities remain, with women, those from lower socio-economic groups and Black and Asian people still less likely to be active than others. The NHS is in crisis, with continued long waits for treatment and demand for services vastly outstripping capacity. These are issues that this sector stands ready to help address through its services, spaces and workforce.

The Government has asked for data to inform their policy and decision making, and we believe that this report, coupled with Sport England's Social Value research, will form some of the tools they need to unlock the further growth, returns and opportunity this sector has to offer.

Huw Edwards, CEO of ukactive

Lisa Dodd-Mayne, Executive Director of Place at Sport England



The UK Health and Fitness market report provides insights for operators, investors, and policymakers alike, enabling them to navigate the evolving landscape and capitalise on the significant opportunities that lie ahead.

At a Glance – UK Health & Fitness Market

(2024 data)



11,486,680

Number of gym or leisure facility members

2023: 10,821,402 | +6.1%



7

Total M&A Deals

2023 | 4



616m

Visits (throughput)

2023: 569m | +8.2%



5,607

Number of clubs

2023: 5,555 | +0.9%



16.9%

Total penetration rate

2023: 16.0% | +0.9%

£5,686m

Total income

2023: £5,224m | +8.8%



Defining the market

For the purposes of this report, the Health and Fitness market refers to the UK's gym and leisure centre sector and considers UK consumer fitness and physical activity trends

- This report focuses on private, independent, and public gym operators (see Terminology for definitions). Analysis focuses on this sector of the market due to the robust operator data that was at ukactive's disposal, compared with data for other areas of the Health and Fitness market.
- The broader health and fitness ecosystem encompasses a diverse sectors, including equipment & apparel suppliers, digital tech & fitness providers, outdoor fitness providers, studios, intermediaries and more. Growth within the operator sector fuels growth opportunities across this wider market.



Methodology & Terminology

This report provides insights into the UK Health and Fitness market, including analysis of consumer needs and the indoor brick-and-mortar fitness operators across the UK:

- A comprehensive dataset was downloaded from Sport England's Active Places Power (APP) platform on 21st February 2025, 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, member 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 4GLOBAL'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.
- Extrapolated home nation figures (Wales, Northern Ireland, Scotland) were validated against existing audits and datasets and figures were compared with CIMPSA to ensure results were representative across the entire UK.
- The methodology was reviewed and validated by the Sport England / Active Places Power team to ensure accuracy and consistency.
- Consumer survey data:
 - Online survey conducted in January, April, July, and September, conducted by Savanta.
 - UK nationally representative sample of adults (age 16+) by age, region, gender, and social grade. Each wave's sample size was over 2,000 (n>2,000).
- Desktop research:
 - Data sources were, amongst others: Mergermarket, Refinitiv, Company websites/press releases, Annual reports, ONS, GOV.UK, Sport England and other publicly available information.
- Market expert data:
 - Series of consultations with industry experts.
 - Representation across public, private and independent operators and Sport England.
- Trends defining the market in 2025.
- M&A activity in the UK Health and Fitness market in 2024.
 - 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).

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 2024 operations, unless stated otherwise.

Revenue recognition

- Revenue figures are in accordance with applicable accounting standards.



Details on Consumer Survey Data

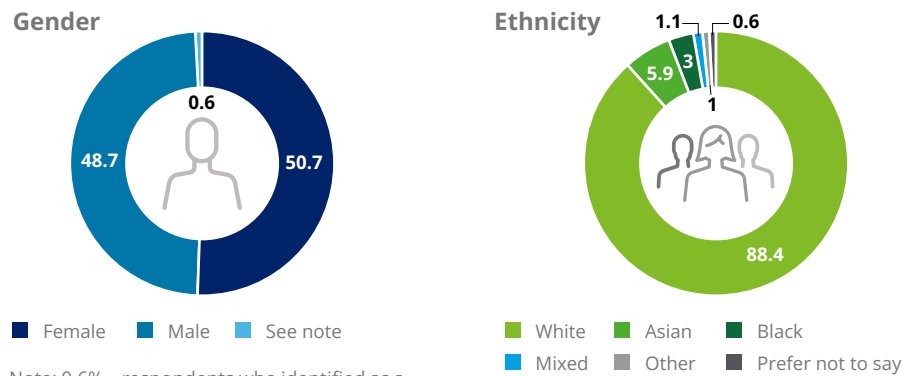
During 2024, Savanta conducted a consumer survey across four waves timed to correspond with the four quarters of the year.

The survey aimed to inform a deeper understanding of how the UK population interacts with the fitness industry, as well as to gain insights into topics such as activity levels, and barriers to activity.

Summary

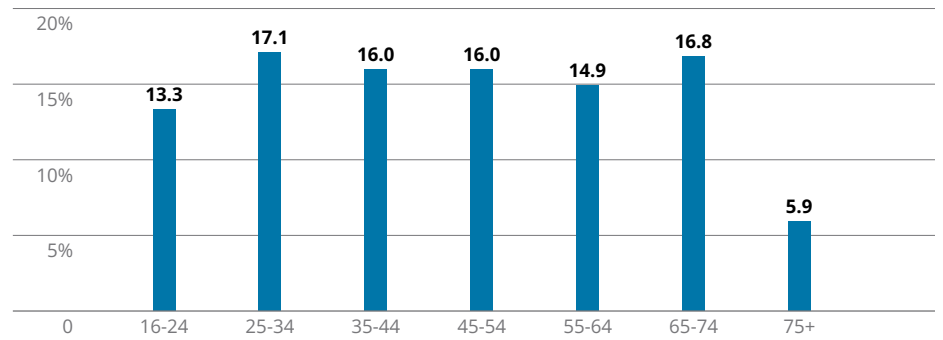
Online survey conducted across four waves in 2024 (January, April, July, September) UK nationally representative sample of adults (age 16+) by age, region, gender, and social grade. Each wave's sample size was over 2,000 (n>2,000).

Figure 1: Overview of Consumer Survey Sample Methodology (%)

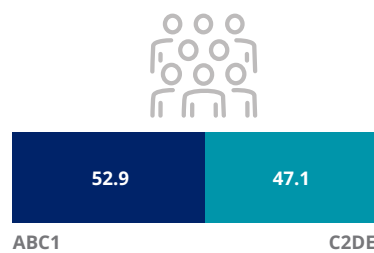


Note: 0.6% – respondents who identified as a transgender woman, transgender man, non-binary, other, or preferred not to say.

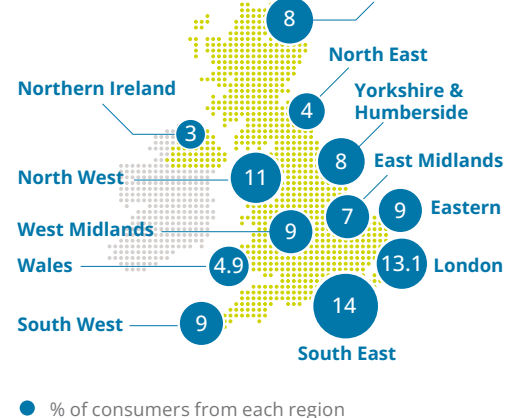
Age



Social group



Location



Source: Savanta.

Operator analysis terminology

Clubs: Fully operational sites in the UK featuring at least a health and fitness gym with resistance and/or cardiovascular equipment. The site must be accessible to the public through membership and/or pay-as-you-go options. This excludes sites such as schools, outdoor gyms, yoga or Pilates studios, studio-only facilities and swimming pool-only facilities.

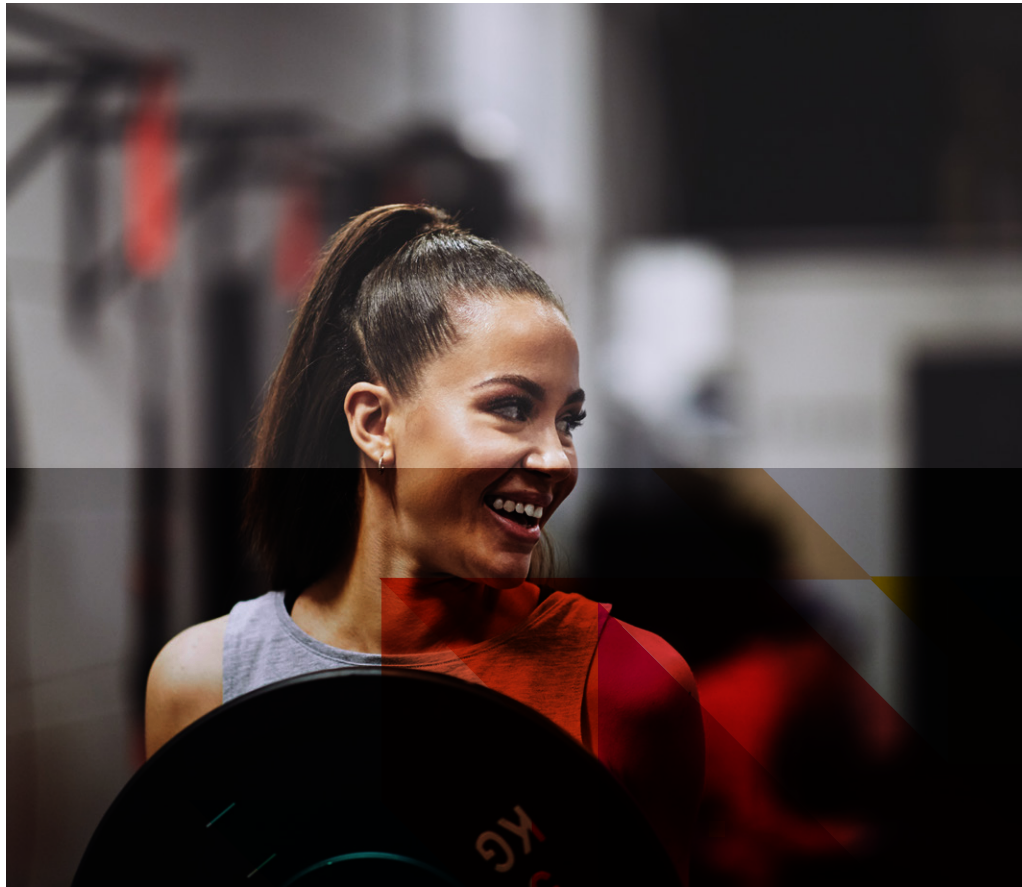
Independent operators: Gym or leisure facility that is commercially owned and commercially managed and has less than a four site portfolio.

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.

Member: 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.

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.



Total Income: Combined revenue from membership income and secondary revenue streams, exclusive of VAT.

Total Throughput: The total number of visits to facilities by users aged 16 or older during the most recently completed quarter. 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.

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.

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.



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Deep Dive – UK Health & Fitness Market

The UK Health and Fitness market is thriving, with private, public, and independent operators capitalising on the surging demand for active wellbeing driving impressive growth and market penetration.

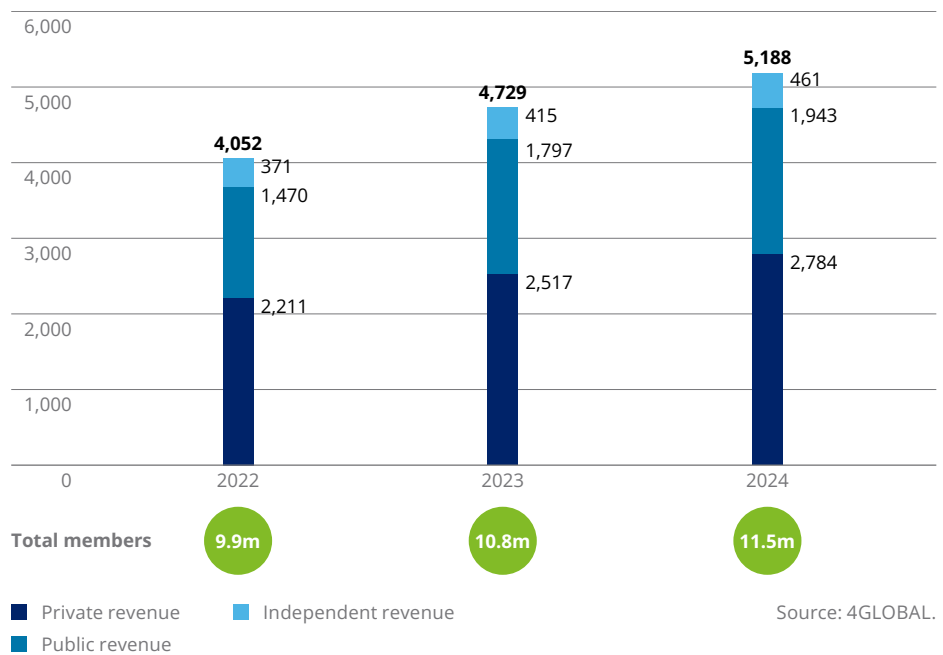
Operator analysis and trends

The UK Health and Fitness Market has experienced impressive growth over the last three years, and at a penetration rate of 16.9%, the UK market penetration is amongst the highest in Europe. Membership income has risen from £4.05 billion in 2022 to £5.19 billion in 2024, a compound annual growth rate (CAGR) of 13.1%. The total number of memberships has increased from 9.9m in 2022 to 11.5m in 2024, and the average revenue per member has also risen. In 2024, on average each member generated operators £452 per year, or £38 per month, (compared with £437 in 2023 and £410 in 2022).

This rise in memberships and revenues has occurred despite a backdrop of cost-of-living pressures, with the ONS Household Expenditure Insights finding discretionary spending to have been slower to recover post COVID-19 pandemic than non-discretionary expenditure. The challenging economic climate, coupled with affordability concerns, has positioned the low-cost model as a key driver of market penetration in the private sector over the past decade.

UK operators can be split into three categories: private multi-site operators (referred to as 'private operators'), independent commercial operators, with a maximum of three sites ('independent operators') and public operators (local authority owned). The market is dominated by the multi-site chains, with private operators accounting for over half of the industry's revenue from membership

Figure 2: Development of member income and memberships since 2022 (£m)



Note: Member income excludes joining fees and secondary income.

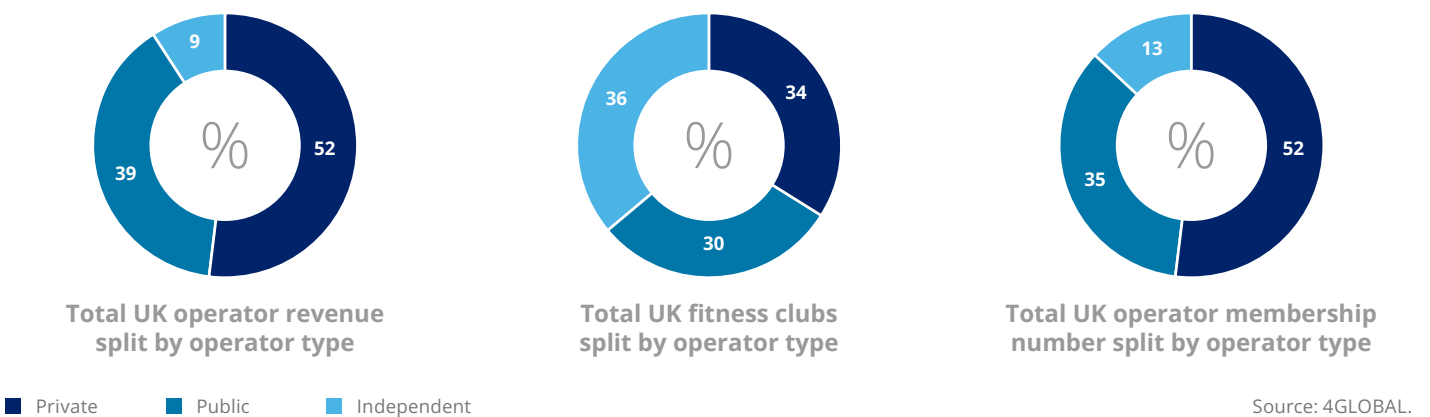
Figure 3: UK Health and Fitness market – three year penetration rates*



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

Source: 4GLOBAL.

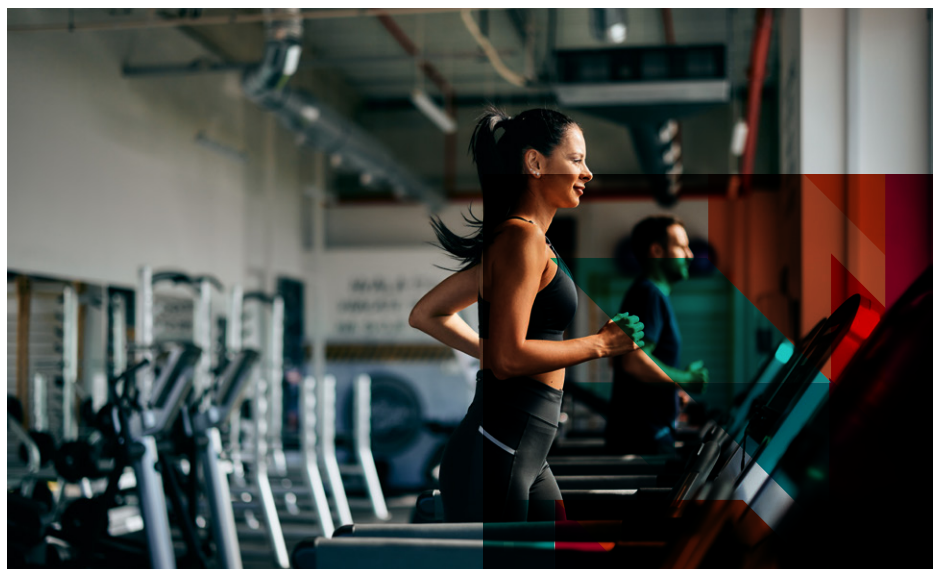
Figure 4: Total UK operator income split by operator type (%)



(54% in 2024) and around half of total members (52% in 2024). Commercial operators, encompassing both private and independent, achieve a combined penetration rate of 10.95%, with public operators making up the remaining 5.95% for an overall market penetration of 16.9%.

In 2024, the sector saw a 10% year-on-year increase in membership income. This growth is fuelled by a rise in members across all market segments, but distinct drivers are behind revenue growth across the different operator types.

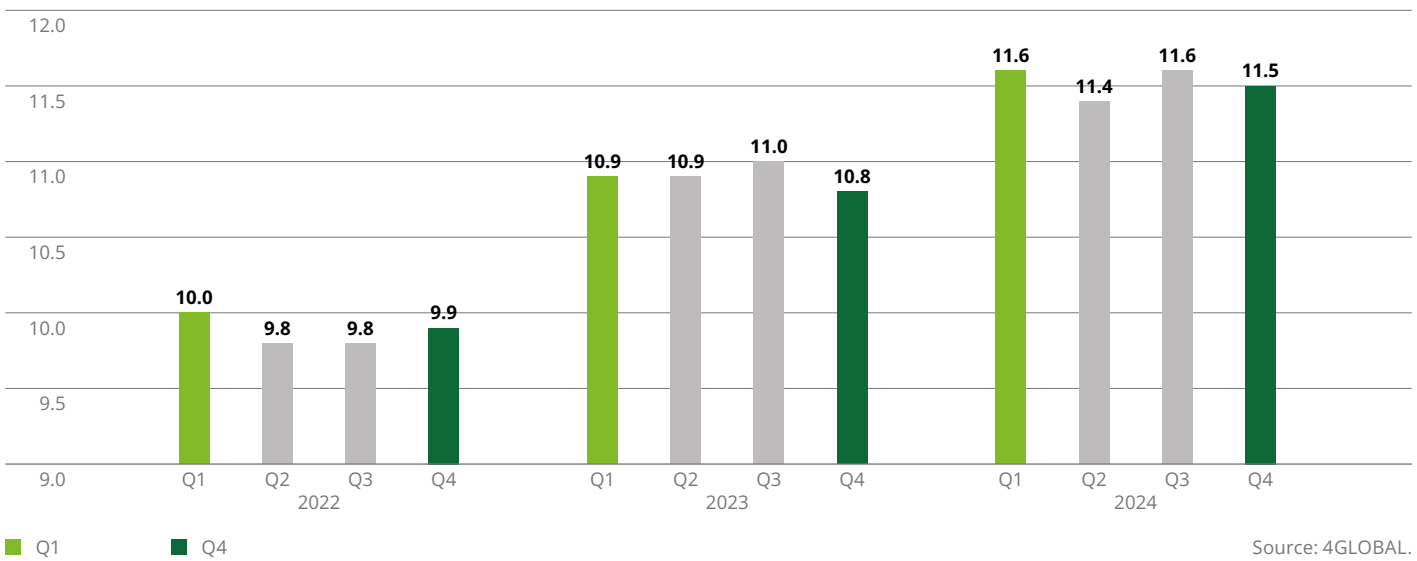
For **private operators**, year-on-year membership income growth (11%) is in large part a result of the continued expansion of flexible (non-contract) low-cost operators, who are capitalising on growing demand from price sensitive consumers. At the other end of the market, premium operators have sought to improve and expand their membership offerings, tapping into demand for a wider range of amenities that cater to a holistic approach to well-being, such as luxurious spa facilities, social spaces, and convenient



work-from-gym options. Mid-market operators have also sought to improve their value proposition, looking to capitalise on a shift in the relative value consumers are placing on fitness.

Membership income has risen from £4.05 billion in 2022 to £5.19 billion.

Figure 5: Year on year comparison of membership numbers from Q1 to Q4 (m)



The market is dominated by the multi-site chains, with private operators accounting for half of the industry’s revenue.

Independent operators have managed to follow suit, also growing membership income by 11% year-on-year. Independent operators were found to generate the lowest revenue per member, largely driven by price reductions within the sector as they compete with low-cost gyms in their areas, signalling that a similar price-sensitive dynamic is at play across both commercial operator types.

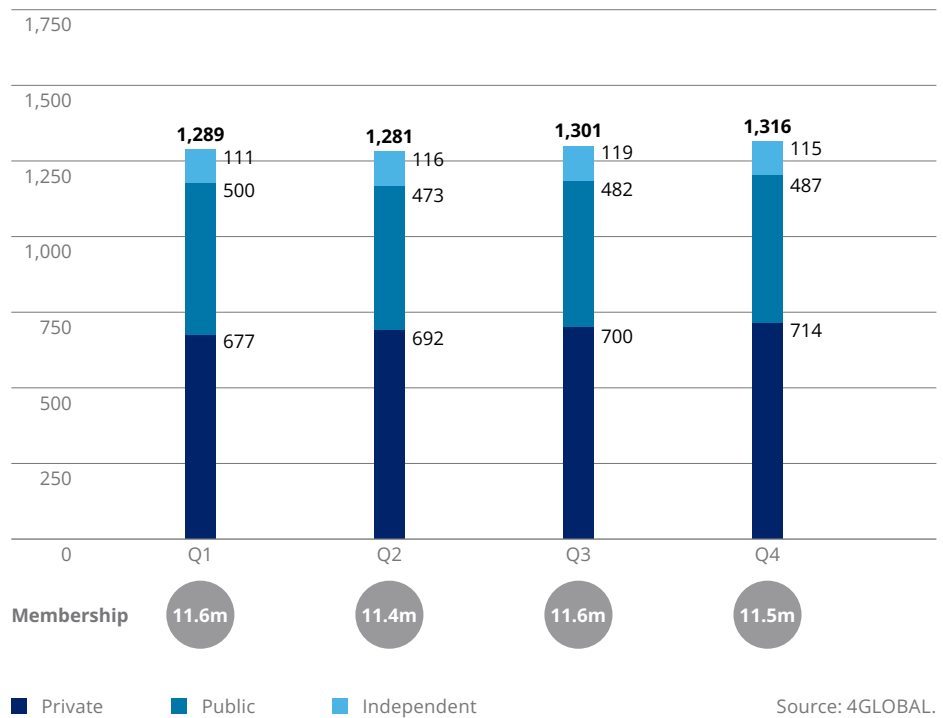
For **public operators**, revenue growth of 8% has been achieved despite a slight decline in the number of clubs year-on-year. Unlike private operators, whose clubs operate at high levels of utilisation, the public sector has been able to grow members and membership income via improving efficiencies and better utilising the capacity of their existing sites. This is in part down to investment in the refurbishing of existing sites, but also a result of consolidation in the market, with larger national operators increasingly

taking over small local authority (LA) or trust-run facilities. This positive trajectory reinforces the vital role these facilities play in promoting health and fitness at the local level, making them a key asset for local authorities committed to improving community health and well-being.

At a quarterly level, we see that gym and leisure facilities are posting the highest membership numbers at the beginning of the year. This well-known phenomenon in the health and fitness sector can be explained by fitness related New Year goals combined with January typically being a period of high marketing and promotional spend. In 2024, operators managed to maintain a large proportion (c.80%) of that growth through to year-end through both retention and new sign-ups offsetting any large membership losses.



Figure 6: Quarterly analysis of membership income vs membership numbers in 2024 (£m)



While Q2 generally represents a decline in membership numbers, the increase in gym memberships during Q3 suggests a strong seasonal effect, with consumers more likely to join during the summer months. This highlights the influence of seasonal trends on membership patterns within the fitness industry and could potentially be capitalised on with more outdoor offerings in that period.

With the addition of various discounts throughout the New Year period, the membership boost in quarter one (Q1) does not translate into higher membership income for the quarter, with revenue from memberships instead slowly climbing throughout the year, capitalising on the retained consumer base. Revenue patterns across operator types reveal distinct seasonal trends and growth trajectories. Public operators experience a peak in membership income in Q1, likely driven by the New Year bounce, followed by a sharp

decline in Q2 and a steadier rise in Q3 and Q4, mirroring their membership numbers. Independent operators, however, see their peak revenue in Q3, suggesting a stronger correlation with summer months and seasonal trends. In contrast, private operators demonstrate consistent revenue growth from Q1 to Q4, indicating a steadier and less volatile growth pattern.

In 2024, on average each member generated operators £452 per year, or £38 per month, (compared with £437 in 2023 and £410 in 2022).

Sweat Equity – M&A in the UK Health & Fitness Market

2024 saw the highest deal volume in the UK Health and Fitness Market since 2020 and continued private equity interest highlights the opportunities for growth and investment.

After fewer transactions in 2023, there has been a rebound in activity in 2024, recording the highest number of deals since the COVID-19 pandemic and highlighting the sustained interest in the market. The Health and Fitness market continues to show market resilience to the macroeconomic headwinds impacting M&A across industries, with investors recognising the long-term growth potential of the sector, driven by consumer trends towards wellness and preventative healthcare.

The market offering attracts investment of ranging share capital, with operators opting for majority acquisitions to expand their market share or penetrate new territories, whereas minority investments offer flexible growth capital, whilst allowing founders to retain operational control. Looking ahead, we anticipate sustained investment from financial investors, attracted by the

sector’s robust year-on-year revenue and membership growth. This continued interest could prompt private equity entrants who have reached the end of their typical holding periods to capitalise on favourable market conditions and seek an exit.

Four deals in particular highlight some of the major trends within the industry:

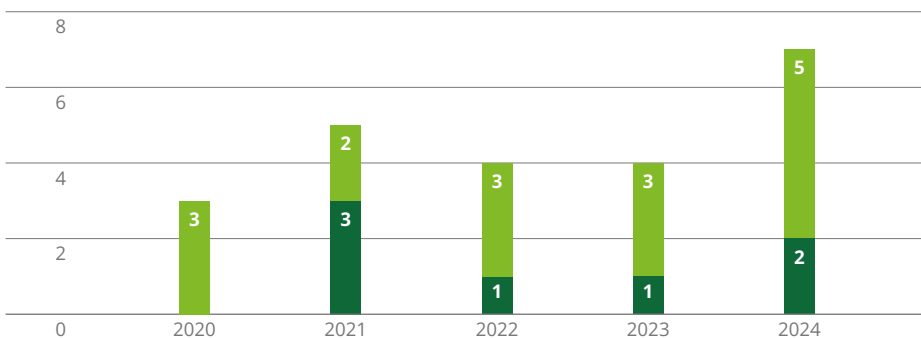
- 1. UK operators targeting international expansion:** PureGym’s acquisition of Blink Fitness, saw them take over 70 clubs in the United States, with PureGym having been considered to be more likely to mitigate anti-trust concerns than rival bidder Planet Fitness. Private fitness operators across the UK, such as David Lloyd and The Gym Group, have made their intentions for expansion well known, and this deal amongst others (David Lloyd

acquisition of Meridian Spa in Germany, Accura Sport Management’ owned health clubs in Spain) is showcasing the potential for UK operator expansion into overseas territories. The choice of UK operators to expand internationally through acquiring and rebranding existing fitness clubs highlights a strong belief in their brand equity and operational expertise. This approach not only facilitates a swift entry into new markets but also highlights the significant potential for international franchising opportunities for UK-based fitness brands.

- 2. Foreign operators eye the UK market:** The UK fitness market is proving attractive to international players seeking expansion, as evidenced by the recent acquisition of Gymbox’s holding company by Urban Gym Group, a Dutch operator. Successful marketing strategies had built Gymbox a reputation as a disruptive gym brand, offering premium facilities to attract a loyal customer base. This brand strength and customer loyalty is evident in Urban Gym Group’s decision to retain the Gymbox branding.

- 3. Private equity backing the market:** 2024 saw Inflexion Private Equity Partners’ recent investment in Ultimate Performance, a personalised training and global premium health and fitness platform. This follows KKR’s notable £300m minority investment in PureGym in 2021, further underscoring

Figure 7: Deal volume by investment type



■ Minority investment
■ Majority investment

Source: Mergermarket; Refinitiv; Trade Press; Deloitte analysis.

Figure 8: Deals within the Health & Fitness market in 2024

Date	Target	Target Territory	Acquirer	Investor Type	Deal Type
January 2024	WIT Fitness Ltd	UK	Frasers Group pls I FRAS	Sports & Fitness Retailer	Majority Investment
April 2024	Simply Gym	UK	JD Sports Gyms Ltd	Private Fitness Operator	Majority Investment
May 2024	Up Fitness Ltd	UK	Inflexion Private Equity Partners	Private Equity Firm	Minority investment
May 2024	One Rebel LTD	UK	Imbiba Partnership	Growth Capital Firm	Minority investment
October 2024	Swim Sports Co Ltd	UK	Undisclosed Acquirer	N/A	Majority Investment
October 2024	Sparring Partners Holdings	UK	Urban Gym Group BV	Private Fitness Operator	Majority Investment
October 2024	Grip-UK Ltd	UK	Verlinvest SA	Private Equity Firm	Majority Investment

Note: Includes only UK based targets in 2024.

Source: Mergermarket; LSEG; Trade Press; Deloitte analysis.

investor confidence in both fitness operators and adjacent market segments. PureGym have been able to utilise this capital injection to fund expansion in its estate and take advantage of market opportunities, such as its entering of the US market (see above). As health and wellbeing become increasingly prioritised by a larger segment of the population, the industry is poised for continued expansion, make it ripe for further investment opportunities.

4. The rise of competitive fitness:

Community-driven, competitive fitness concepts like CrossFit and Hyrox have gained momentum over the past year and have become a focal point in discussions with the UK's fitness industry leaders. Frasers Group's relaunch of WIT Fitness in 2024 with the brand's original founders is a testament to the growing recognition of this market segment's potential.

Public sector leisure centres – alternative investment models

Local Authorities and Leisure Trusts are seeking innovative funding solutions for public leisure centres to address increasing cost pressures and competing demands for local authority funding. In the Future of Public Leisure Report, Sport England committed to assess alternative approaches to the funding of public leisure. This work is underway and is assessing the feasibility of alternative investment models (e.g. via pension funds). The work has involved consultation with sector stakeholders, Government departments and potential investors and considers funding models utilised in other sectors, existing arrangements which could be scaled and industry benchmarks. Over coming months Sport England will develop this work with local authorities, leisure operators and funders to assess feasibility of the models and agree next steps.

There is a mix of both majority and minority acquisitions, with operators opting for majority acquisitions to expand their market share or penetrate new territories, whereas minority investments offer flexible growth capital, whilst allowing founders to retain operational control.

Insights from ukactive Consumer Survey

Key takeaways of the ukactive consumer survey



1 Membership linked to active lifestyles: A strong correlation exists between gym or leisure facility membership and increased physical activity. A third of non-gym members were found to be inactive, compared to 18% of past members and just 3% of current members.



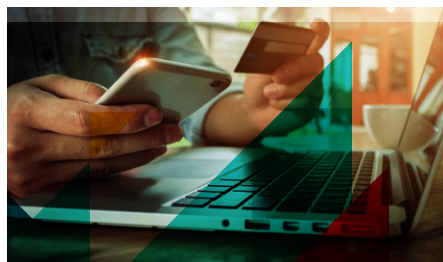
2 Generational shift: Younger age groups demonstrated higher levels of physical activity and membership. These younger generations also reported fewer intrinsic barriers preventing them from joining and engaging with gym or leisure facilities.



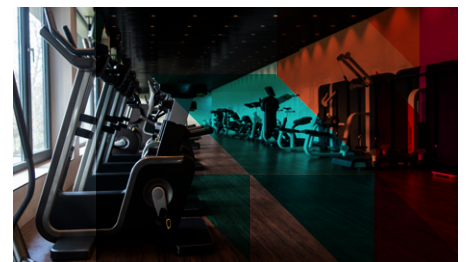
3 A push for healthcare integration: People with a health condition are less active than the general population but also have more intrinsic barriers towards being a gym or leisure facility member. Stronger integration between the healthcare and fitness industries is crucial to promote preventative care and empower these individuals to achieve their activity goals.



4 Home vs away: Exercising at home and at the gym appear to complement each other rather than compete. Individuals who frequently exercise at home are also more likely to hold a gym or leisure facility membership.



5 Price is the biggest hurdle: Cost presents the largest barrier to gym or leisure facility membership for non-members. Following cost, the most common reasons cited relate to individual perceptions and preferences, including a perceived lack of need, lack of interest, and feeling uncomfortable within the gym environment.



6 Proximity matters: Respondents who are members of a gym or leisure facility considered location their most important selection criteria for a specific facility.

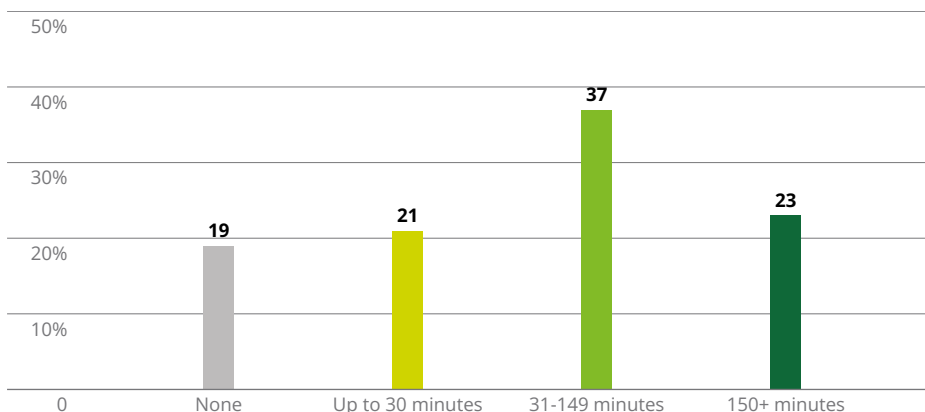
The following analysis is based on survey responses of c.2,000 participants across four waves who took part in the ukactive consumer survey. Whilst the sample was representative of the UK adult population, these insights should be considered in the context of the sample size. These insights provide a strong foundation for understanding key trends and should be considered alongside other relevant data and analysis for comprehensive decision-making.

Levels of physical activity

81% of survey participants engaged in some form of moderate or vigorous physical activity per week. Approximately one quarter (23%) of survey participants stated that they exercise for more than 150 minutes per week and 19% reported not doing any physical activity at all.

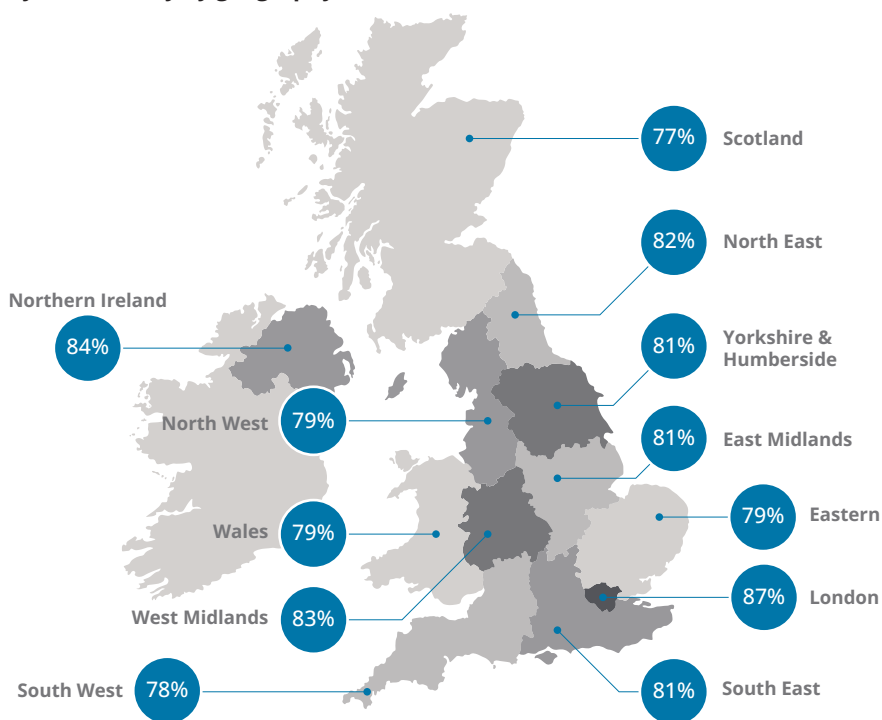
Survey respondents in London were found to be the most active, with 87% reporting doing some form of physical activity (at least up to 30 minutes) per week, whereas the physical activity rates across Scotland (77%) were the lowest across the UK.

Figure 9: Survey respondents' minutes of moderate or vigorous intensity physical activity completed per week (%)



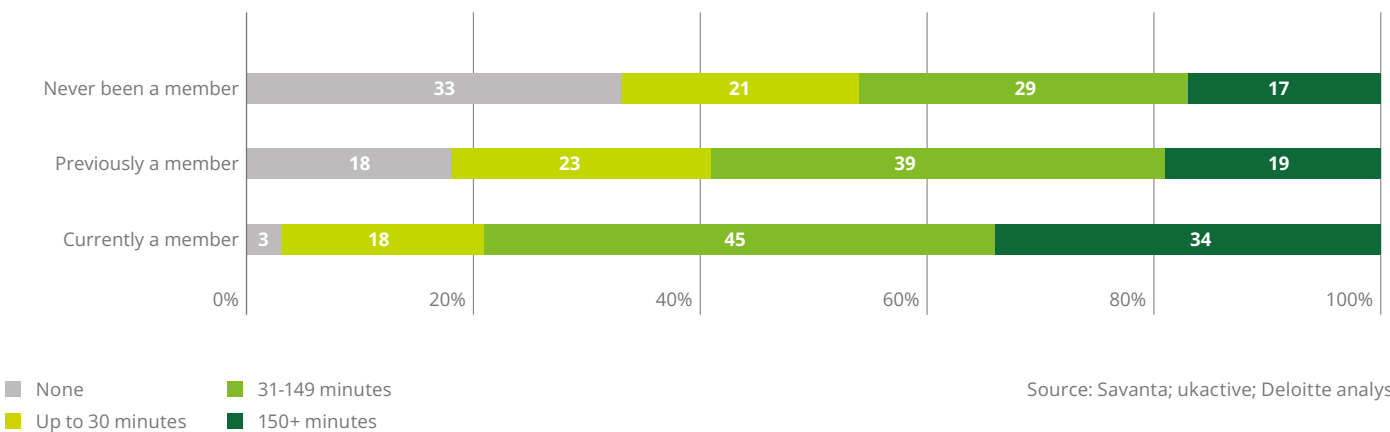
Source: Savanta; ukactive; Deloitte analysis.

Figure 10: Proportion of survey respondents taking part in at least 30 minutes of physical activity by geography (%)



Source: Deloitte analysis.

Figure 11: Minutes of moderate or vigorous intensity physical activity per week by membership status (%)



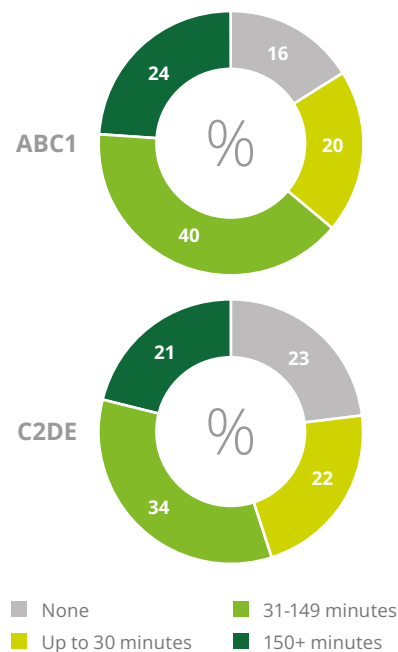
Members are more active

Individuals who have never been members of a gym or leisure facility indicated the highest rate of inactivity, with 33% reporting no engagement in physical activity at all, suggesting a correlation between gym or leisure facility membership and overall participation in physical activity. Conversely, only 3% of individuals who are currently a member of a gym or leisure facility were found to be completely inactive.

Inequality and Inactivity

Individuals of lower socio-economic status were found to have lower rates of physical activity, further evidencing the need for targeted attempts to improve physical activity levels in lower socio-economic populations, as set out in Sport England’s Active Lives Adult Survey November 2022-23 Report.

Figure 12: Minutes of moderate or vigorous intensity physical activity per week by socio-economic status (%)

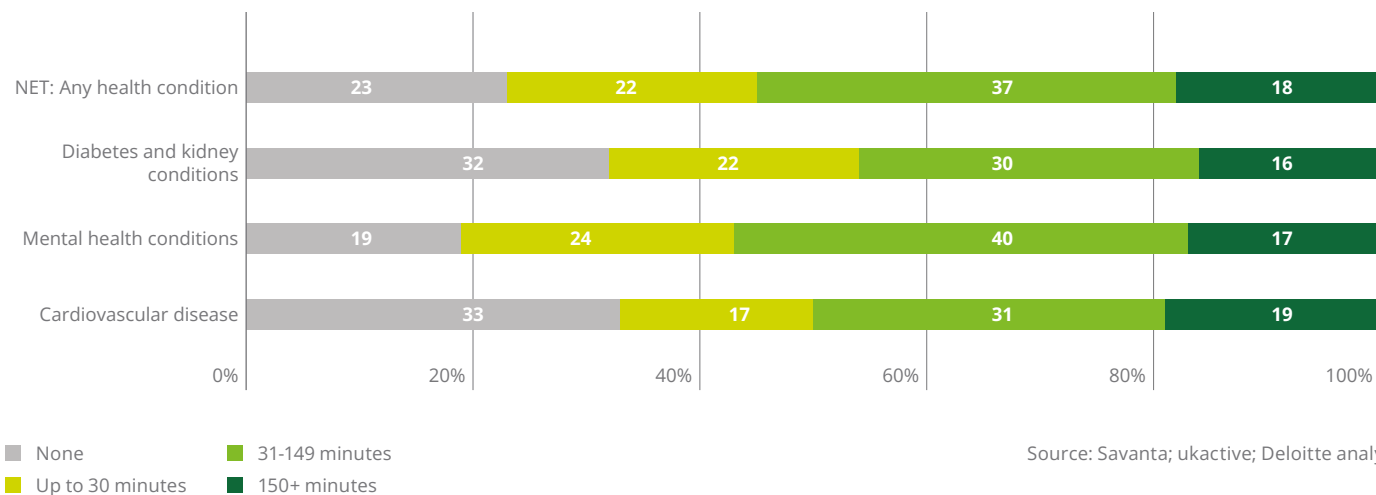


Preventative health benefits

The World Health Organisation (WHO) states that physical activity reduces the risk of coronary heart disease, stroke, diabetes, high blood pressure, various types of cancer and depression whereas a lack of physical activity may contribute to a higher risk of premature death through an increase in metabolic risk factors (such as raised blood pressure, blood glucose, elevated blood lipids and obesity) which could worsen various health conditions.

Individuals with health conditions, for whom lifestyle changes such as exercise would typically reduce the risk of complications and prevent worsening of their conditions, indicated they exercise less than the average survey respondent. This could highlight a need for greater collaboration and integration between gym and leisure facilities and health services to develop targeted strategies and support systems that empower and encourage these individuals to adopt healthier lifestyle habits.

Figure 13: Minutes of moderate or vigorous intensity physical activity per week by health condition (%)

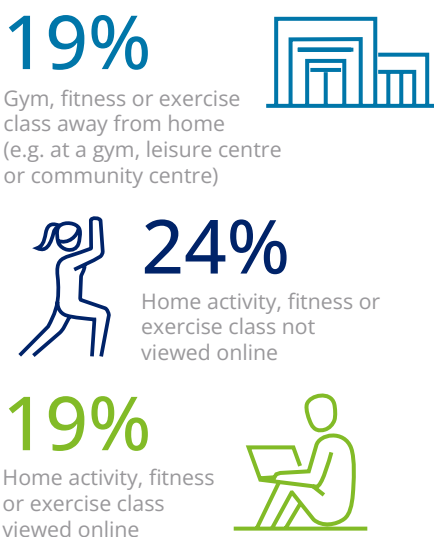


Online complements in-gym

A higher proportion of respondents exercised at home than they did in a setting away from home, such as a leisure facility, community centre or an outdoor gym.

Among those who exercise at home, a significant proportion (46%) of those using online content and 39% of those not using online content are also members of a gym or leisure facility. This suggests that home exercise and gym or leisure facility workouts may actually complement each other, with individuals potentially engaging in both to meet their fitness needs and preferences.

Figure 14: Proportion of survey respondents that exercise at least twice a week in the following fitness settings (%)

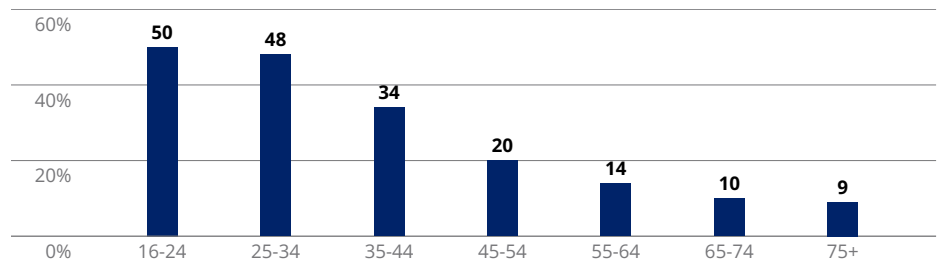


The World Health Organisation (WHO) states that physical activity reduces the risk of coronary heart disease, stroke, diabetes, high blood pressure, various types of cancer and depression.

Targeting all age groups

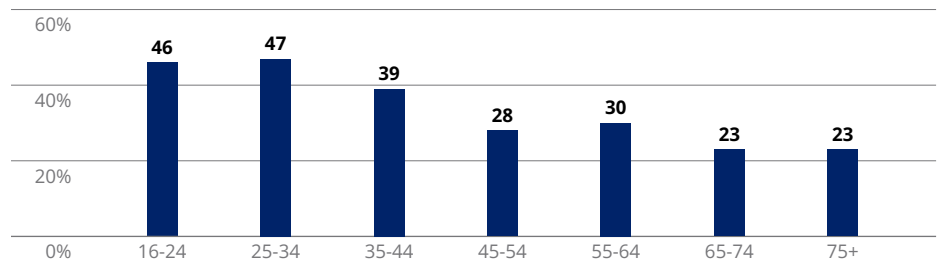
Individuals who exercised at home without online content were proportionally more active across the older age groups (35+). The decline in away-from-home activity is more pronounced in older age groups compared to the decline in home-based activity. This suggests that a segment of the older population remains active by engaging in exercise primarily within their homes. Gym and leisure facilities in the UK could consider adapting to the growing aging population by developing targeted strategies for older adults. By catering to this demographic’s needs, these facilities can ensure they are engaging all age groups and maximising membership retention across a consumer’s lifetime.

Figure 15: % of each age group who exercise at least once a week – away from home (fitness or exercise class) (%)



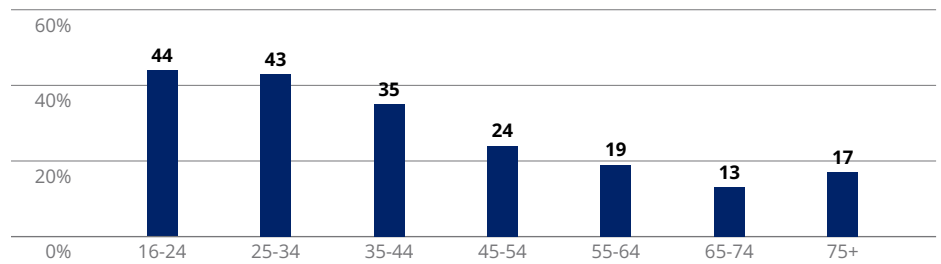
■ % respondents who exercised at least once a week Source: Savanta; ukactive; Deloitte analysis.

Figure 16: % of each age group who exercise at least once a week – at home (without online content) (%)



■ % respondents who exercised at least once a week Source: Savanta; ukactive; Deloitte analysis.

Figure 17: % of each age group who exercise at least once a week – at home (with online content) (%)



■ % respondents who exercised at least once a week Source: Savanta; ukactive; Deloitte analysis.

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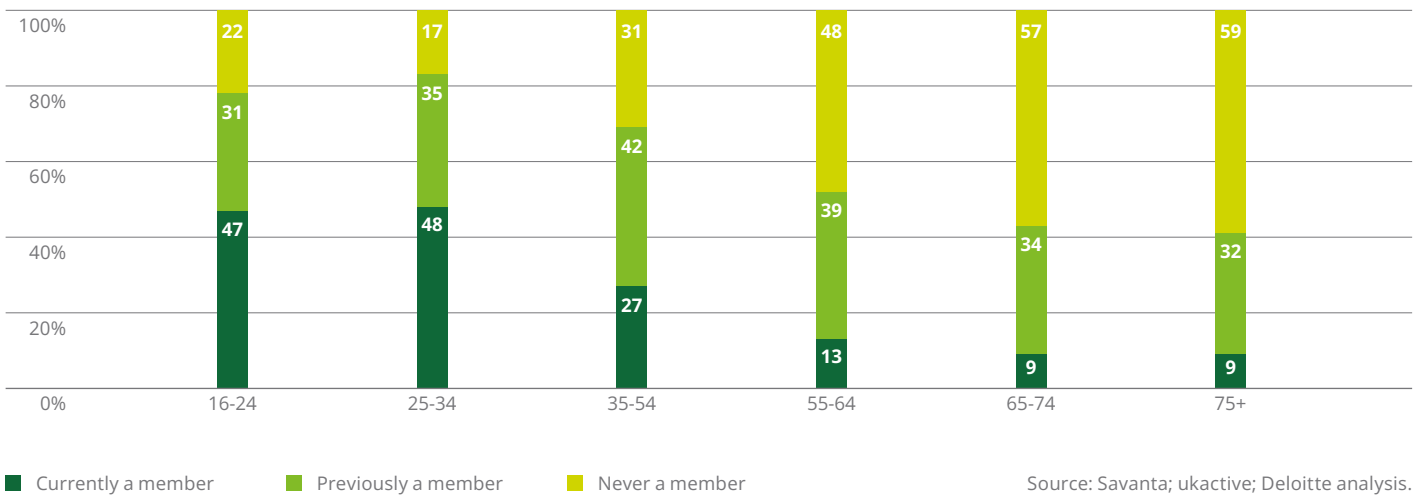
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Figure 18: Gym or leisure facility membership status by age group (%)



Note: The ukactive Consumer Survey did not survey the population under 16 years of age, whereas the Penetration Rate is calculated as total members divided by the total population.



From 'nice to have' to essential

Membership of a gym or leisure facility was the highest amongst younger respondents. Respondents aged between 25-34 years were the most likely to be a current member, followed by those aged between 16-24 years. Respondents over the age of 35 were much less likely to have a gym or leisure facility membership, and c.60% of people over 65 years old have never held a gym membership in their lives. The increasing prevalence of gym and leisure facility memberships, particularly among younger generations, suggests a generational shift.

While memberships were once less common, they appear to be evolving into the mainstream, with a majority of individuals engaging with these facilities at some point in their lives. For some consumers, and particularly young consumers, gym membership is no longer a 'nice to have' but an essential.

The increasing prevalence of gym and leisure facility memberships, particularly among younger generations, suggests a generational shift.

Strength and fitness goals key motivators

'Improving / maintaining their physical strength and fitness' was the highest ranked factor among respondents as a motivator for taking out a gym membership, indicating that the core activity of exercising for physical improvement was still the main driver for gym-goers.

'Improving mental health and wellbeing' was the second highest ranked motivating factor overall and was considered to be important by 76% or more of respondents across all age groups.

'Improving overall confidence' was an important motivator amongst the younger age groups, being the highest motivator for 16–24-year-olds and 80% of 25–34-year-olds considered it important. However, this fell to 69% in the 45–54-year age group and decreased in importance for each subsequent age group.

'Making friends' and 'Preparing for an important event' were the lowest ranked motivating factor across the respondents, particularly among the respondents above the age of 35 years. 44% of 35–54-year-olds and 33% of respondents older than 55-years, highlighted making friends an important motivating factor, whereas 20% of 55–74-year-olds and 15% in the 75+ age group noted 'Preparing for an important event' as a motivating factor.



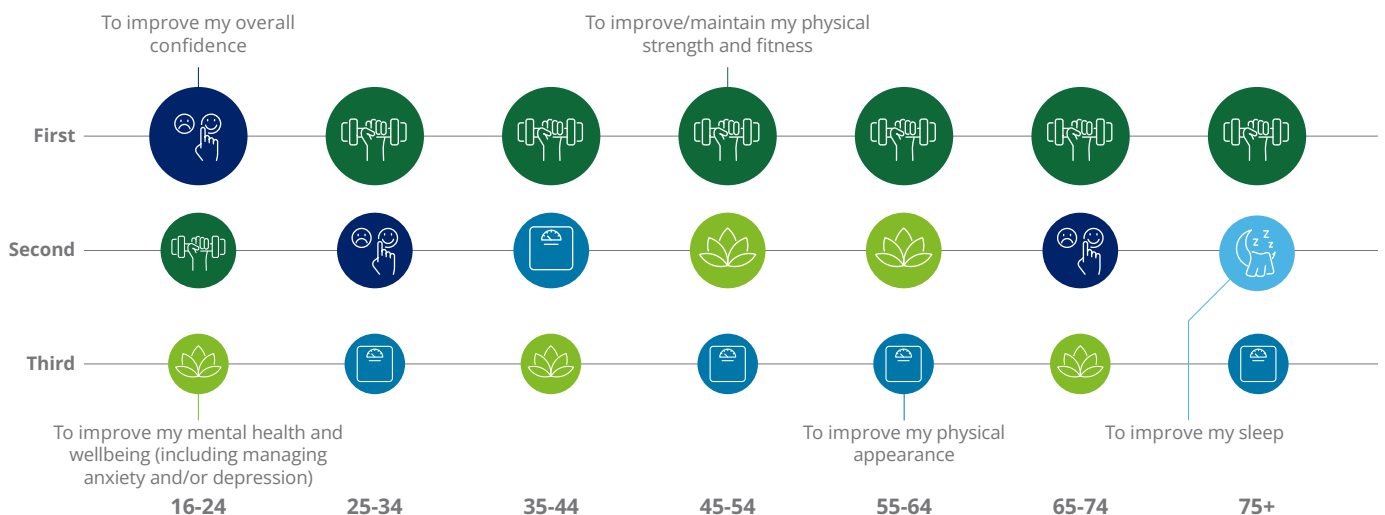
Improving / maintaining their physical strength and fitness was the highest ranked factor among respondents as a motivator for taking out a gym membership.

Figure 19: Most frequently cited motivating factors for obtaining a membership (%)



Source: Savanta; ukactive; Deloitte analysis.

Figure 20: Top three motivating factors considered important by age group



Source: Savanta; ukactive; Deloitte analysis.



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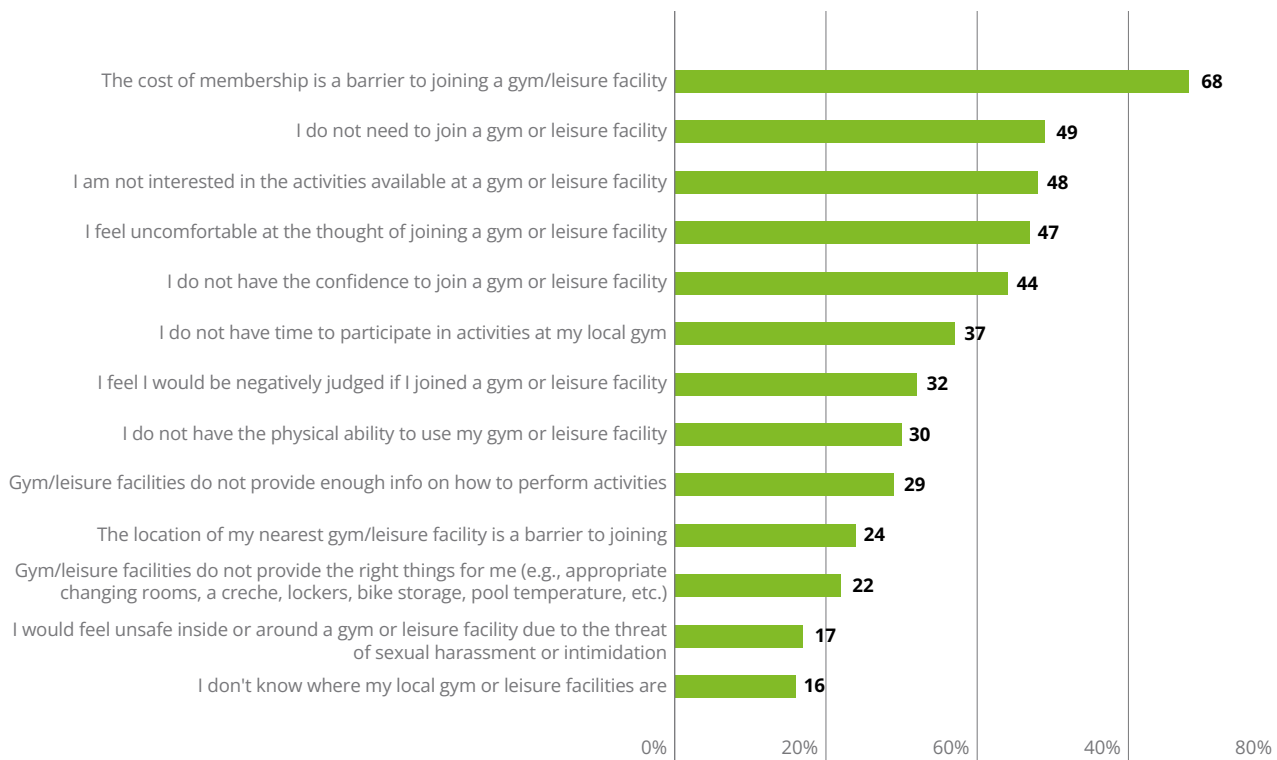
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Figure 21: Ranking of barriers to taking out a membership for non-members (%)



Source: Savanta; ukactive; Deloitte analysis.

Cost was viewed as slightly less of a barrier amongst younger (16-34) and older (65-75+) age groups compared to the middle age groups (35-64).

Cost was perceived as the biggest barrier to membership amongst non-members

The most commonly cited barrier to taking up a gym membership was cost, with 68% of respondents indicating it was a barrier. This was consistent across various demographics including age, gender, and socio-economic status.

Cost was viewed as slightly less of a barrier amongst younger (16-34) and older (65-75+) age groups compared to the middle age groups (35-64). This could indicate that membership discount rates for students and pensioners could be alleviating some of the cost pressures for those age groups.

Almost half of the respondents who were not members of a gym or leisure facility felt that they did not need to join (49%), while 48% stated that they were not interested in the activities available at their gym or leisure facility.

Approximately a third of the non-member respondents felt that they would be negatively judged by joining a gym or leisure facility. 44% stated they did not have the confidence to join a gym or leisure facility and 47% stated they would feel uncomfortable at the thought of joining a gym or leisure facility.

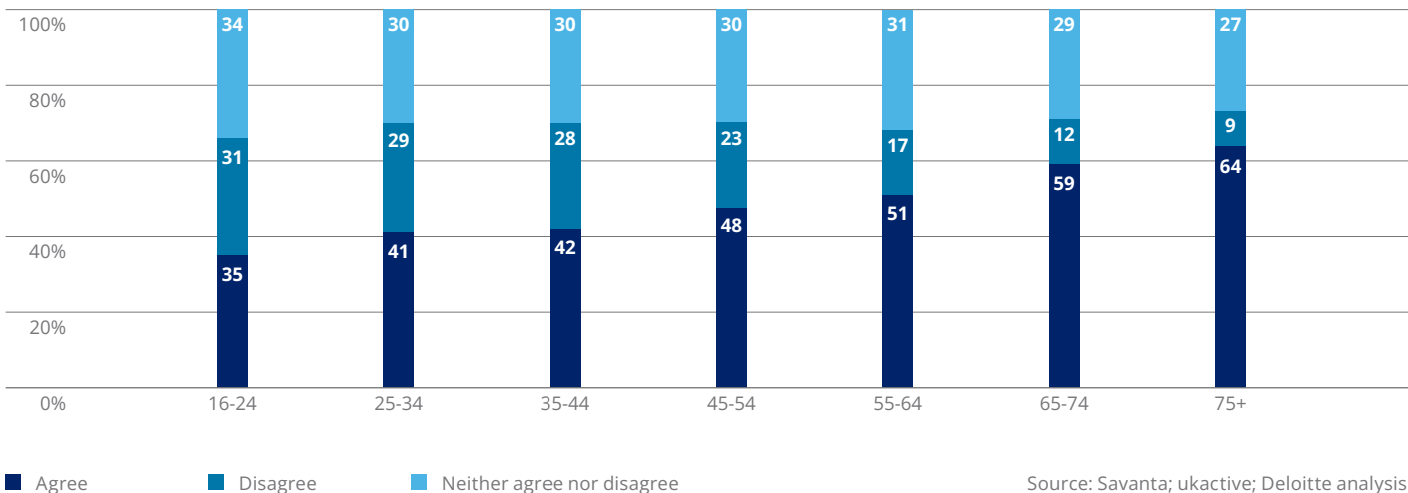
Oldest adults least likely to see benefits of gym memberships

Older age-groups were more likely to avoid joining a gym or leisure facility because they believe they do not need to, indicating that the positive shift in mindset towards fitness is more prevalent amongst younger age-groups.

Of respondents who were not currently members of a gym or leisure facility, a higher proportion of males (55%) believed they did not need to sign up compared to females (45%). This suggests that the higher levels of activity and gym membership observed in men do not translate into a universal desire for gym membership among all men.



Figure 22: Non-members who believe they don't need a gym or leisure facility membership by age group (%)



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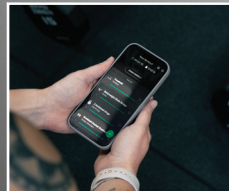
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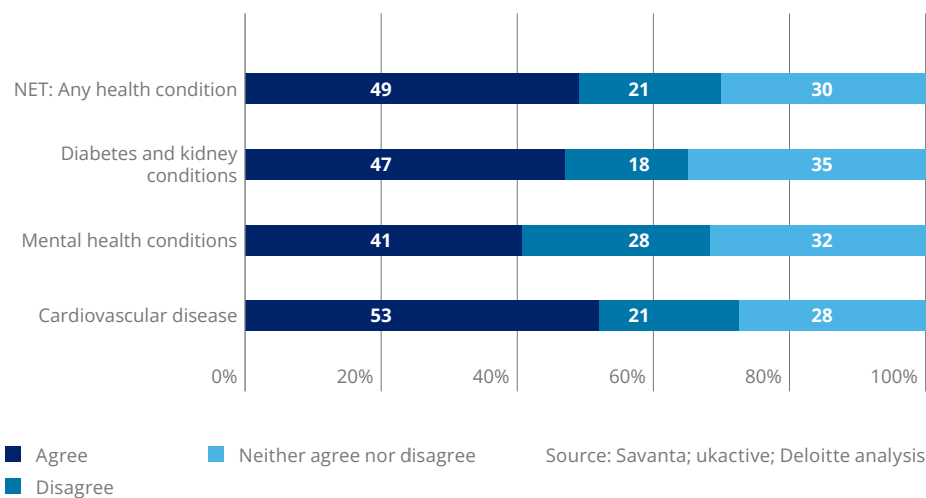
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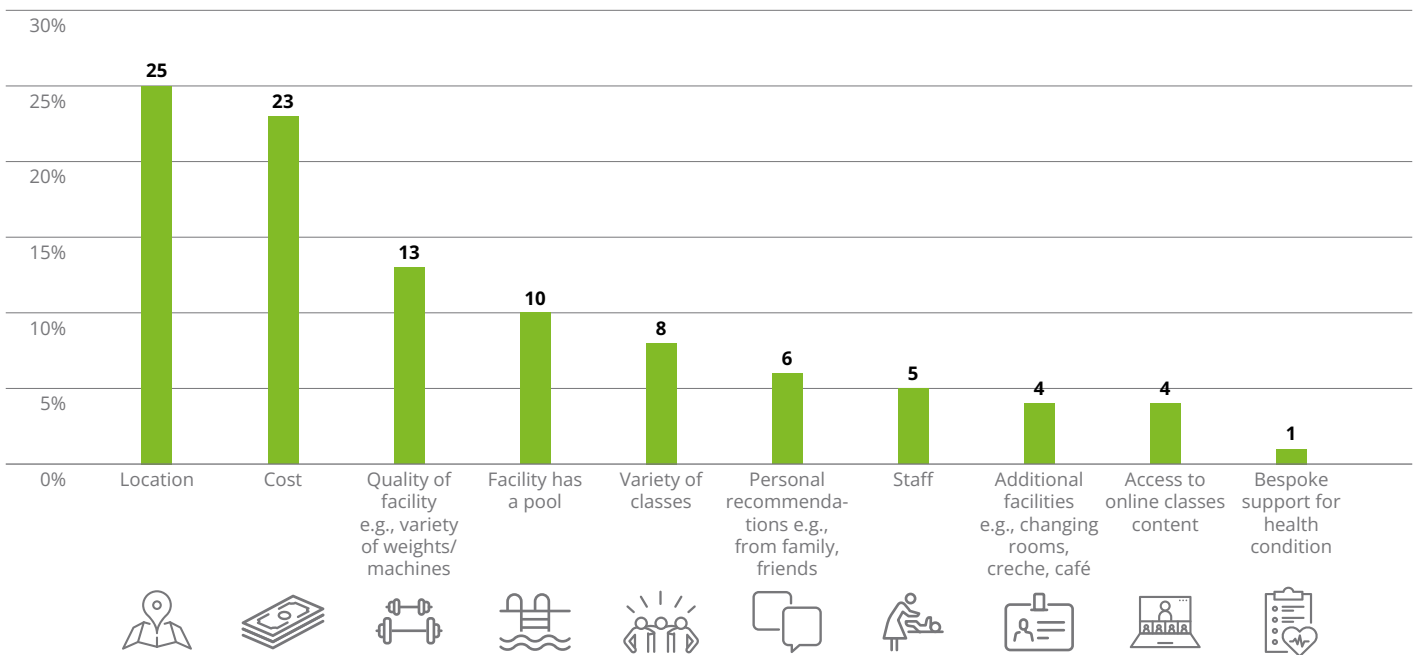
Figure 23: Non-members who believe they don't need a gym or leisure facility membership by health condition (%)



Shift in mindset needed to encourage change in high risk individuals

A large proportion of the respondents with a health condition stated they do not need to join a gym or leisure facility, despite evidence that physical activity is known to be a key preventative and risk reducing lifestyle factor. This indicates that there is still a need to increase awareness and shift the population's mindset towards preventative care and risk reduction. As shown in Figure 11, there was a significant difference of activity levels in the survey respondents who are members of a gym or leisure facility and those who were not, and therefore prioritising gym or leisure facility sign-ups for this population could help these individuals meet their activity goals.

Figure 24: Ranking of criteria considered important in selecting specific gym or leisure facility (%)



Source: Savanta; ukactive; Deloitte analysis.

Location reigns supreme when deciding on which club to join

‘Location’ was cited as the most important criteria for gym or leisure facility selection by 25% of respondents, while ‘Cost’ was the second most widely cited criteria (23%). This finding was consistent across all demographic groups other than the 35-54-year-olds, for whom ‘Cost’ was the highest-ranking selection criteria.

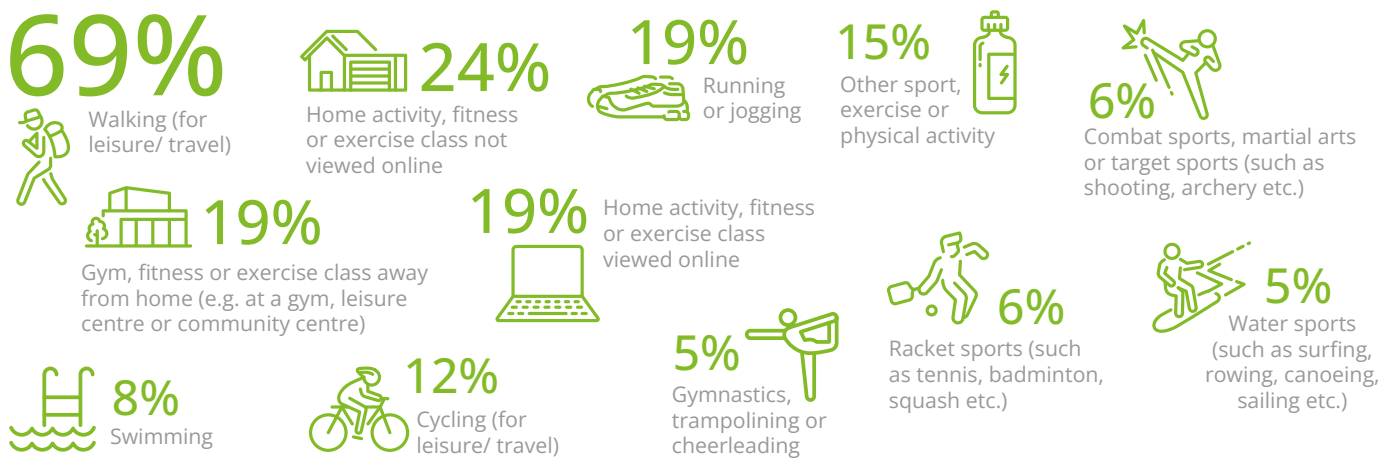
‘Quality of the facility e.g. variety of weights/machines’ was among the top three criteria of 46% of respondents, with men more frequently citing it as the most important factor for gym or leisure facility selection (15%) compared with women (11%).

While most age groups prioritised location, cost, and facility quality when choosing a gym or leisure facility, respondents aged 75+ placed a higher value on the availability of a pool, with over half of the respondents in this age group ranking it among their top three factors. This contrasted sharply with the younger generations, where less than a quarter of 16–24-year-olds consider a pool as a primary factor in their decision-making.

Most age groups prioritised location, cost and facility quality when choosing their specific gym or leisure facility. Respondents aged 75+ placed a higher value on the availability of a pool.



Figure 25: Proportion of respondents undertaking activity at least twice a week (%)



Source: Savanta; ukactive; Deloitte analysis.

Walking wins the race

The most popular form of physical activity was walking, with over two thirds of the respondents stating that they walked for leisure or travel at least twice a week. This could be due to its versatility as both a mode of transport and a readily accessible form of exercise. It is no cost, minimal impact, and lack of required equipment or specialised training make it a more inclusive form of exercise.

The second most common physical activity was independent (i.e. not viewed online) home exercise (24%), followed by gym, fitness, or exercise classes either away from home (19%) or online (19%) and running or jogging (19%).

35% of survey participants aged 16-34 years reported going to a gym, fitness or exercise class away from home twice a week. This is a higher proportion than those who reported exercising twice a week independently at home (31%) or at home online (29%). All other age categories were more likely to exercise at home, either online or independently, than they were to exercise at a gym, fitness or exercise class away from home.

Whilst male and female consumers were found to participate to similar levels of frequency in walking, home exercise and fitness away from home, there were some notable differences. 23% of men ran at least twice a week, compared to 15% of women, and 17% of men cycled at least twice per week, compared to 8% of women.

The most popular form of physical activity was walking, with over two thirds of the respondents stating that they walked for leisure or travel at least twice a week.

A Look Ahead – UK Health & Fitness in 2025

Through consultations with industry leaders across the UK's Health and Fitness market, a clear picture has emerged of both the opportunities and challenges that are shaping the future of the industry. From shifting consumer behaviours and digital transformation, to evolving business models and public health priorities, the landscape is undergoing significant change.

As we look ahead, several key trends are expected to define the market in 2025 and beyond.

1. Deeper integration with health systems: The fitness industry can play an increasingly important role in healthcare pathways. Collaborations with healthcare providers, particularly in areas like weight management, rehabilitation and mental health programmes, will become more prevalent. This shift aligns with the growing strain on the NHS and the broader emphasis on preventative care strategies.

2. Quantifying and communicating social value: By demonstrating industry wide social value through consistent data and reporting mechanisms, the sector can effectively communicate its collective contribution to health, well-being, and social outcomes. Aligning with the robust evidence base in Sport England's Moving Communities will be essential in highlighting the sector's broader societal benefits.

3. Navigating economic headwinds: Rising operating costs will continue to pose some challenges for the industry. Operators can adapt by identifying opportunities for operational efficiencies, implementing innovative pricing models that resonate with cost-conscious consumers and strategically differentiating offerings to meet different consumer market priorities.

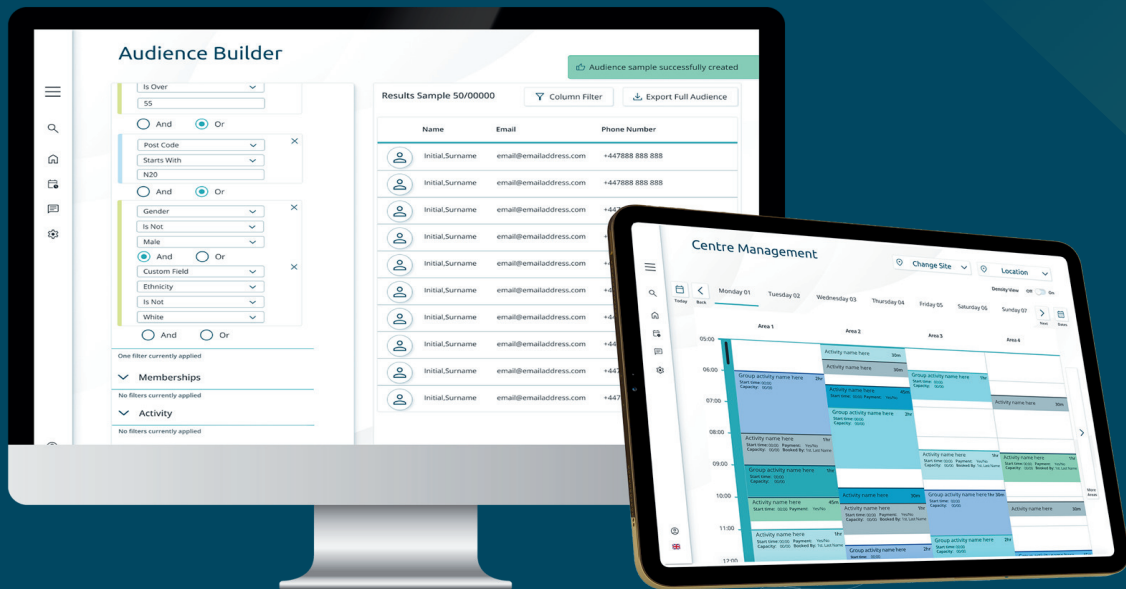
4. Embracing diversity and inclusivity: The fitness landscape is evolving, with a notable rise in the popularity of strength training and inclusive competitive formats. To remain competitive and cater to a broader demographic, fitness providers can prioritise diversity and inclusivity in their offerings. This includes expanding program options to encompass a wider range of fitness goals and preferences, while fostering a welcoming and supportive community environment.

5. Engaging the next generation of fitness consumers: Health, fitness and wellbeing is seen as a non-negotiable for younger generations, Motivations for fitness are evolving beyond physical health to encompass social connection and mental well-being, particularly among Gen Z. Operators can capitalise on this market opportunity by creating engaging social spaces that go beyond fitness, building a sense of community and offering experiences that align with consumer priorities.

6. Pharmaceutical intervention: The healthcare sector is increasingly considering the use of weight loss drugs, specifically glucagon-like peptide 1 (GLP-1) agonists such as Ozempic, combined with lifestyle plans to aid in controlling type 2 diabetes. As a result, incorporating exercise and a healthy diet would be key to achieving the full health benefits and long-term results, further driving the need for stronger integration.



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About Us

This report is testament to sector-wide collaboration to drive forward and raise the sectors reporting and understanding. The utilisation of consistent, regular, credible data sets that cover public, private, and independent operators, combined with consumer polling and market performance data give our sector the foundation it requires, and deserves, to grow and succeed. We want to say thank you to all contributing operators and Leisure Management System providers for providing data, our sponsors, and the members of our steering committees for input and guidance on the development and delivery of this report.

About ukactive

ukactive is the UK's trade body for the physical activity sector, bringing together more than 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.

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