CIL Strategy Consultants

total fitness

The Voice of the UK Gym Customer

What really matters and why

01

Gym memberships are increasingly treated as non-discretionary, with fitness the primary hobby for many members.

Consumers attend frequently, integrate the gym into daily routines, and perceive strong value for money relative to other areas of discretionary spend. This dynamic is most pronounced among younger cohorts, supporting long-term demand resilience. Within this, a growing proportion now view fitness and related activities as their primary hobby.

02

Penetration is high, but the market is still maturing.

Member volumes are rising, willingness to pay is increasing, and UK penetration still trails comparable international markets. Importantly, this gap exists despite there being plenty of suppliers, which suggests strong unmet demand rather than a lack of supply.

03

Accessibility is improving.

Technology adoption, healthcare innovation - including the growing use of GLP-1 weight-loss medications - and a broader range of gym formats are enabling wider participation in fitness.

04

Consumers do not align neatly with traditional 'low-cost-mid-premium' tiers.

Purchasing behaviour is shaped by need state, propositional fit, convenience and perceived value rather than by rigid industry segmentation. This has material implications for how operators design, price and localise their offers - and for how investors assess and compare opportunities across the market.

05

Brands remain well trusted sector-wide.

Satisfaction levels are high across tiers, while persistent overcrowding highlights unmet demand and clear opportunity for additional capacity.

Introduction & methodology

The UK gym market is in a phase of sustained growth. Many operators are reporting record trading and historically high membership levels, reflecting the strengthening role fitness plays in everyday life.

Investor sentiment reflects the sector's history. Experiences from the early 2000s, alongside the rapid emergence of low-cost models, continue to inform how parts of the market are viewed today – providing a useful backdrop for assessing how the sector has fundamentally evolved since.

At the same time, public and investor perspectives are still adjusting to the scale of the structural change underway. Gym membership has evolved beyond discretionary leisure spend. For a growing share of consumers, it is embedded in daily routines – closely linked to health management, identity and life style.

This report explores those shifts. Drawing on consumer data from extensive market-wide surveys of UK-based over-16s conducted by Total Fitness, we examine how demand is evolving, how the role of the gym is changing, and what this implies for operators and investors as the sector enters its next phase of growth.

Sophie Lawler
CEO, Total Fitness

"As the first independent, representative view of the private-sector gym customer, the report serves as a critical friend. It challenges investors to revisit entrenched assumptions about the sector, and urges operators to address the customer detractors and opportunities that matter most.

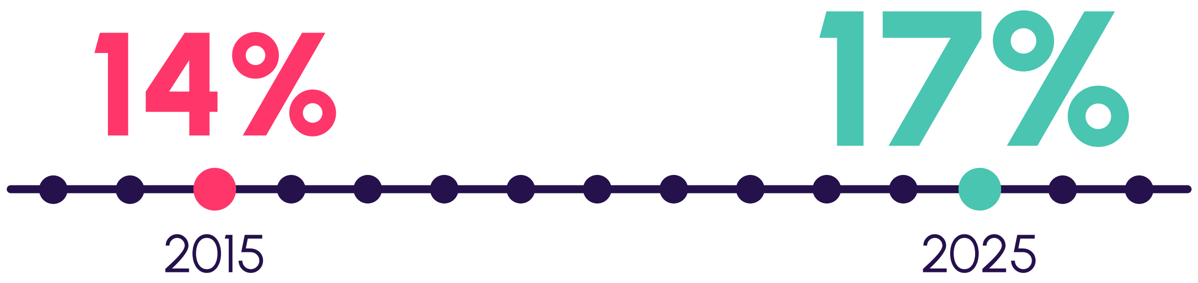
Consumer demand

Penetration is high – and headroom remains

Gym membership penetration now stands at 17% of the UK population, up meaningfully over the past decade (from 14% in 2015). Growth has been strongest among younger age groups, but participation is increasingly broad-based. Notably, a third of surveyed 45-54-year-olds now hold a membership, indicating that the active customer base is ageing with the market and extending engagement over time.

This has clear implications for lifetime value. As cohorts carry fitness habits forward, the industry benefits from longer tenures, stronger attachment and greater cross-sell potential. Combined with rising spend per member – including growth in multi-membership behaviour – this supports an increasingly attractive financial profile.

UK gym membership penetration in the last decade



Sophie Lawler
CEO, Total Fitness

I can think of few other sectors with a near-100% addressable market. Framing penetration only by comparison with other countries or sectors may be limiting.

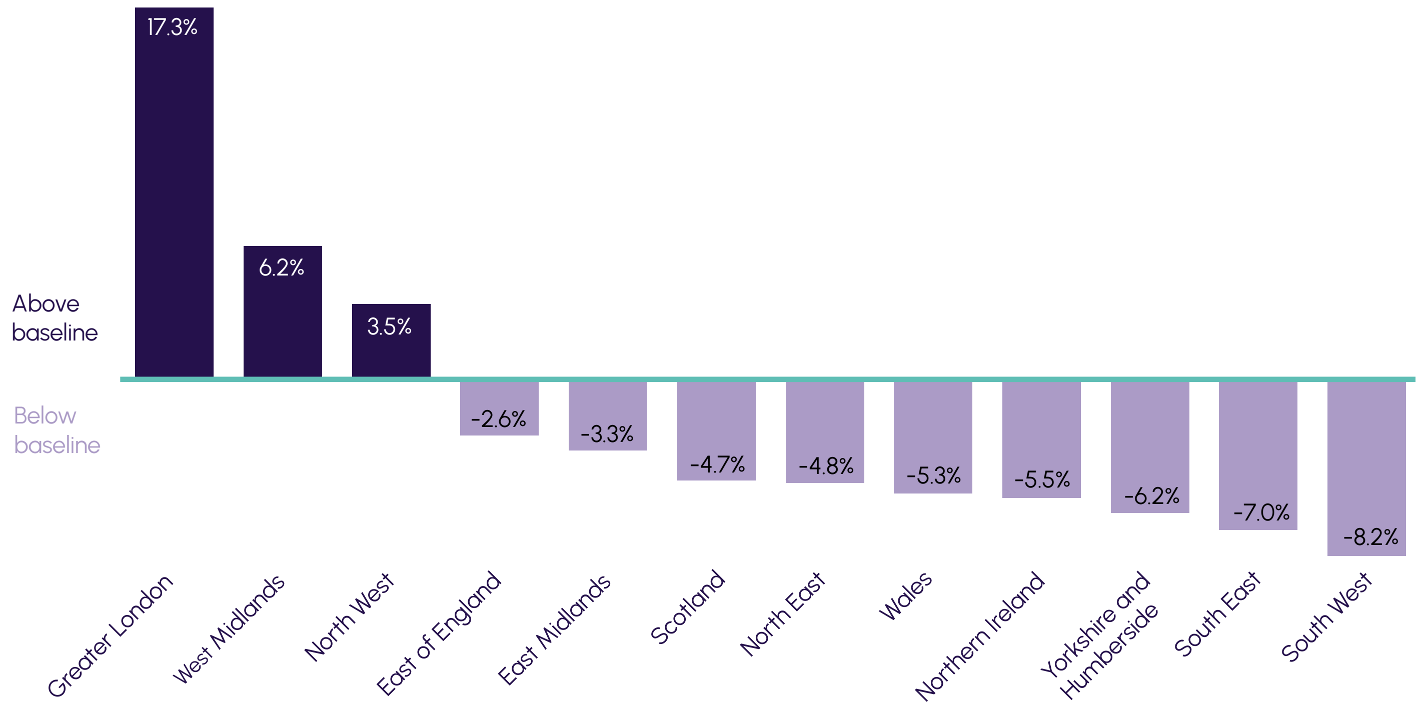
If we genuinely believed 80–90% penetration was achievable, we would work harder to broaden access beyond price alone - improving how gyms feel, attracting lower-confidence customers, and expanding the serviceable market. We would also rethink footprint, finding ways to make the economics work everywhere.

Penetration varies by region, though less sharply than often assumed. Major cities continue to record higher participation rates, reflecting younger populations and denser, and often more varied, supply.

This pattern also points to the next phase of growth. Lower-density and suburban areas remain comparatively under-served, creating expansion opportunities as participation continues to broaden geographically.

International benchmarks reinforce this opportunity. Gym penetration stands at 25% in the US and above 20% in Scandinavia, with both markets still expanding. The UK's position suggests a market continuing to normalise gym usage as a mainstream behaviour, not saturation. Within this, there is likely targeted opportunity for both private investment and public policy support, particularly into the private sector in lower-density and lower-income areas.

Are you currently a member of a gym or health club?
n=5,091



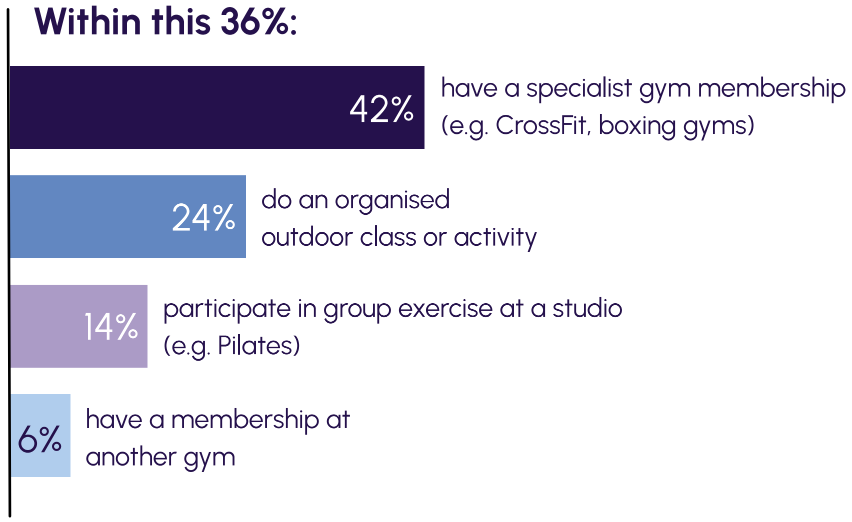
Most members continue to use traditional open-access gyms, but participation in different formats – including group-based formats and performance-led models such as CrossFit and Hyrox – has expanded rapidly. These behaviours are broadening the fitness ecosystem, encouraging a portfolio of different products/ memberships usage and expanding the overall served market opportunity.

> **Participation in fitness events is rising as part of a broader, structural shift rather than a short-term anomaly. As fitness continues to professionalise and take on the characteristics of a sport, an increasing share of gym-goers are focusing their training around clear, goal-driven outcomes. While this mindset is most evident among younger cohorts today, it is likely to spread steadily into older generations over time.**

Liam McGuinness
Partner, CIL Strategy Consultants

36%

complement gym visits with another paid fitness service
n = 1,894



Usage is frequent and resilient

Average exercise frequency stands at 1.7 visits per week, rising from 1.3 among those earning under £30k to 2.5 among those earning over £150k. Notably, frequency does not increase materially with gym tier, indicating that lifestyle and motivation – rather than price point – are the primary drivers of usage.

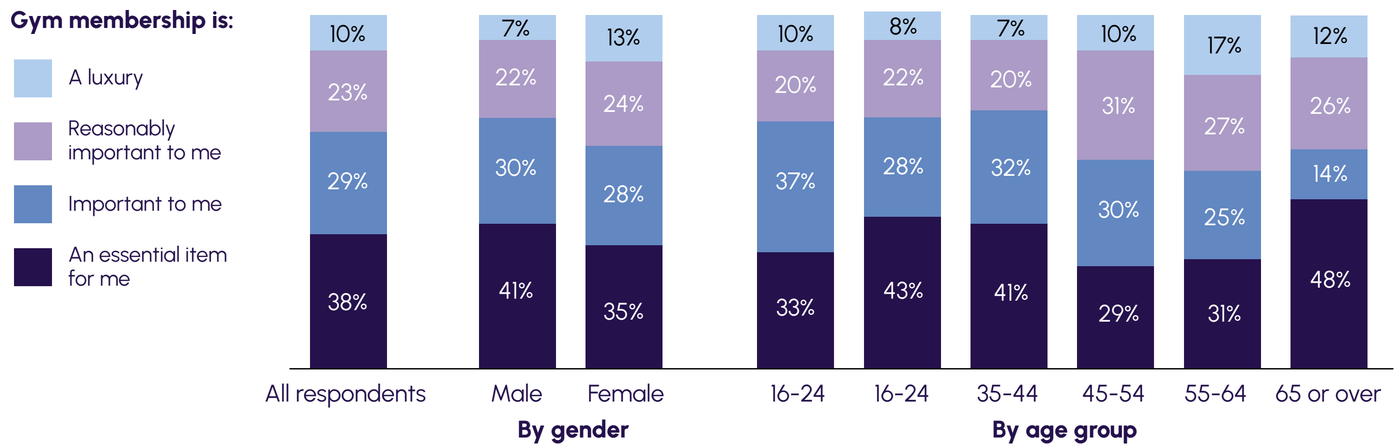
This level of engagement is a strong indicator of stickiness. Members who attend regularly are significantly less likely to lapse, and a high baseline of usage remains one of the clearest signals of underlying sector resilience, whilst also driving the busyness that supports further supply expansion opportunities.

Membership is increasingly viewed as essential

A clear structural shift is evident. Around 38% of members now classify their gym membership an "essential" expense.

For many consumers, fitness is a routine-defining behaviour and a preferred use of leisure time and spend. An increasing proportion describe exercise as their primary hobby, with the highest incidence among younger cohorts and multi-membership users (around 10% of members). This shift is significant. Gyms now sit alongside core household priorities in the consumer hierarchy of spend, rather than competing solely with other leisure activities.

What priority do you place on a gym membership compared to other items / services that you buy?
n = 1,894



Sophie Lawler
CEO, Total Fitness

> **The shift towards hobbyism shouldn't be dismissed as semantics. A hobby isn't discretionary - it's defining. It shapes identity and purpose.**
>
> **Twenty years ago, joining a gym was the 'right' thing to do. Today, it carries far more meaning. That shift gives the sector a much deeper sense of durability.**

Motivations & selection

Motivations diverge by age

Initial motivations for joining a gym vary clearly by demographic and are driven primarily by emotional factors (feel better about myself/my life) rather than functional ones (fitness level).

Older members tend to prioritise improvements in health and overall fitness. Younger members are more often motivated by aesthetics, confidence and preparation for specific events, while urban members show a higher propensity for performance-orientated training formats such as Hyrox.

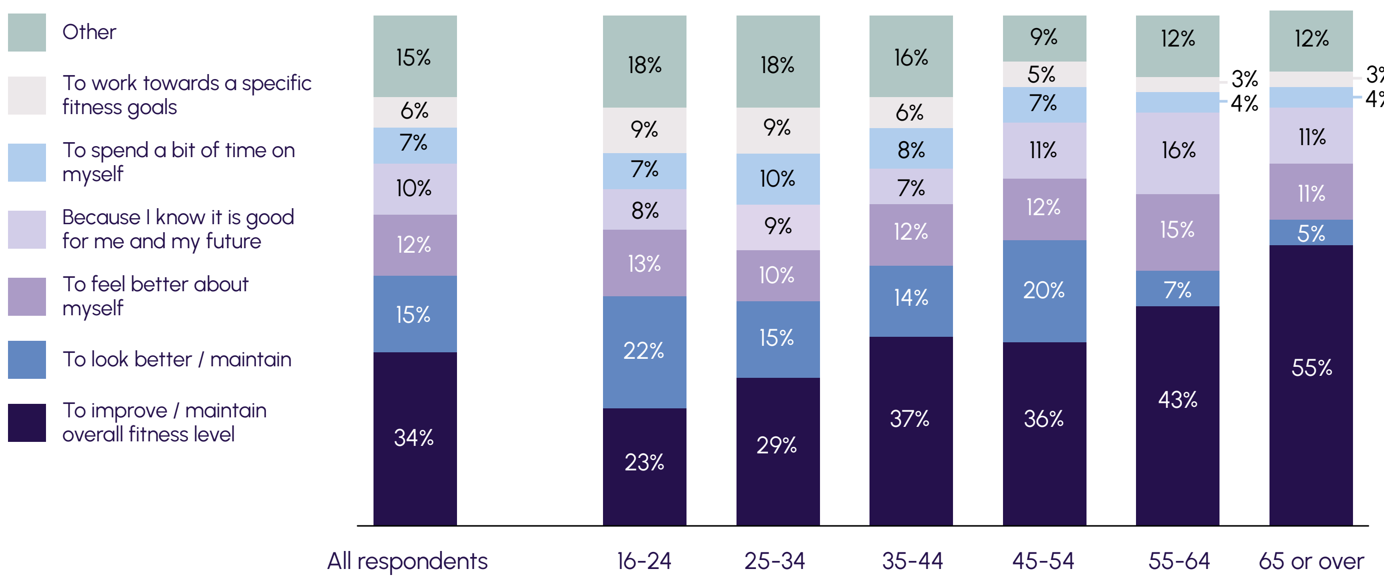
Selection criteria remain consistent

Once the decision to join has been made, gym choice is guided by a relatively stable set of functional considerations. While several factors are weighed, three consistently matter most: convenience, the quality and suitability of the proposition, and value for money.

Price plays a role, but for active members it is rarely the decisive factor. The success of low-cost gyms is better explained by perceived value than by price sensitivity alone - a clean, convenient, "good-enough" proposition that fits easily into daily routines.

This distinction is important. mid-market and premium operators can perform well where the offer is meaningfully differentiated in ways that resonate with local customers.

What is the main reason you have a gym membership?
n=1,894



Sophie Lawler
CEO, Total Fitness

That mental health is a new or emerging reason to join isn't quite right. The "real" reasons to join have always been tied to self-worth, self-control and self-determination.

But all too often a customer will give the "right" reason to join rather than the "real" one, and we should confess that it served the sector better to talk in terms of health outcomes rather than more challenging themes.

Appetite for additional services is growing

Nearly two-thirds of members express willingness to pay for additional services. Demand is strongest among 25-44 year olds, high earners and multi-membership users.

The most sought-after services include access to dedicated training zones, performance testing and personal training.

For operators, this adds complexity to benchmarking and proposition design. For investors, it reinforces the importance of localised offers and flexibility, rather than reliance on top-down tiering assumptions.

The potential wallet share in fitness is encouraging. In the past six months, we've launched two bolt-on products, with close to 10% of new members adding them at sign-up.

That uptake reflects clear appetite for simple, optional add-ons beyond core membership. Early signs show these members visit 44% more often, underlining the role of bolt-ons in driving incremental value.

Kerry Curtis
CCO, Total Fitness

Which of the following extra products might appeal to you?
n=1,127, multiple selections were allowed

53%
Fitness products
E.g. PT, workout plans, body scans

50%
Nutritional / wellness advice services

43%
Dedicated workout spaces
E.g. private gym areas, family gym

39%
Food and drink

38%
Recovery products
E.g. cold water therapy

31%
Priority account services
E.g. priority class bookings

9%
Other retail items
E.g. performance clothing or accessories

Competitive considerations

Satisfaction is high – with clear pressure points

Overall satisfaction levels are strong across all gym proposition types. However, a consistent pressure point sits beneath this headline: capacity.

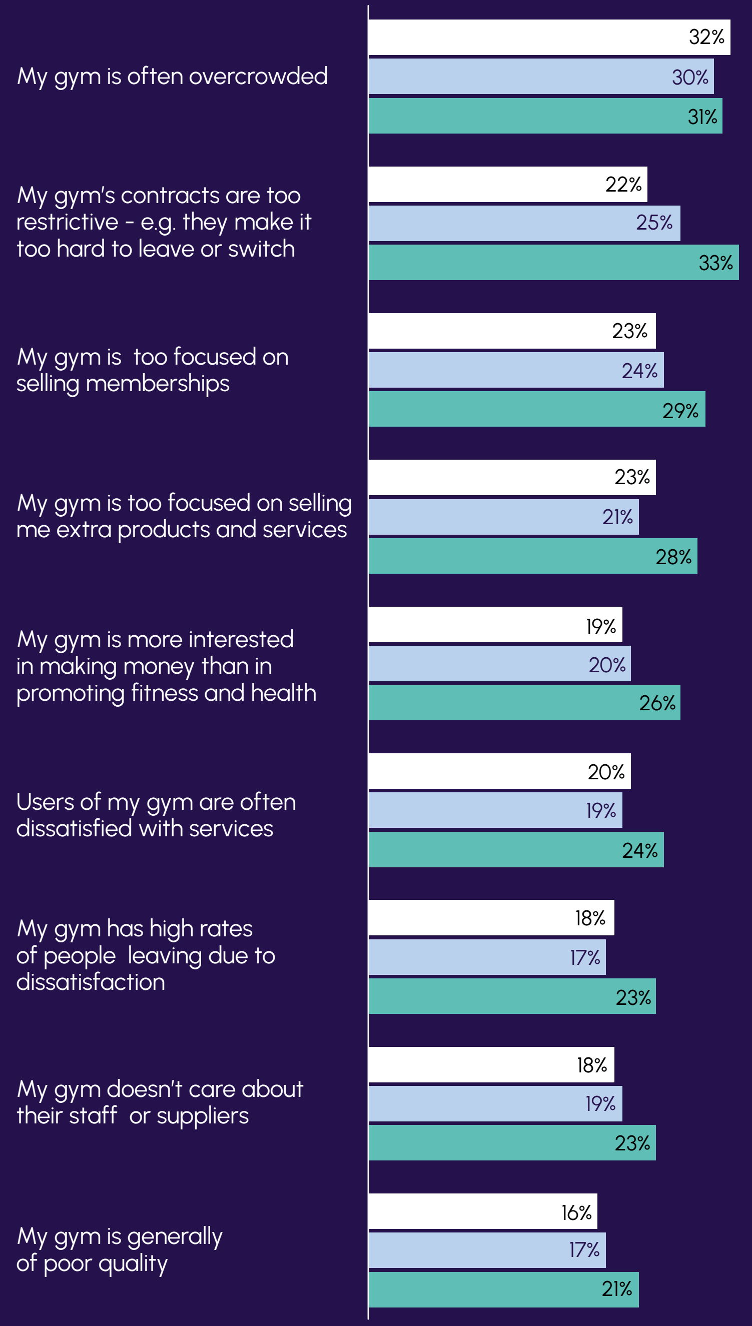
Across low-cost, mid-market and premium brands, members most frequently cite overcrowding as their primary frustration. Among premium members in particular, dissatisfaction tends to stem from a perceived mismatch between price paid and experience delivered.

The implication is clear. Capacity, rather than price sensitivity, represents the sector's most material operational challenge. The supply-demand imbalance identified earlier reinforces this dynamic.

> This fragility in satisfaction is a pressing, complex risk. It's within our control, but hard to address because current models prioritise what works commercially over what works for customers - an imbalance that isn't sustainable.

Sophie Lawler
CEO, Total Fitness

To what extent do you agree with the following statements?
n= 2,446, sum of respondents answering 'agree' and 'strongly agree'



> Proving the case for new, long-lease clubs has long relied on persistent volume growth, often at the expense of earnings quality and the sector's reputation. Today, sustained demand and higher usage are structural features, making high-quality earnings a defining trait. It's time investors reconsider gyms - as capacity-constrained subscription businesses, with growth driven by intelligent yield rather than volume.

Sophie Lawler
CEO, Total Fitness

Staff matter for hygiene, not instruction

Cleanliness remains a core expectation. Around 60% of respondents rate it as "very" or "extremely" important, with perceptions closely linked to visible staff presence.

By contrast, demand for staff-led instruction is limited. Most members prefer autonomy or digital support for training, reflecting broader shifts in how consumers engage with fitness.

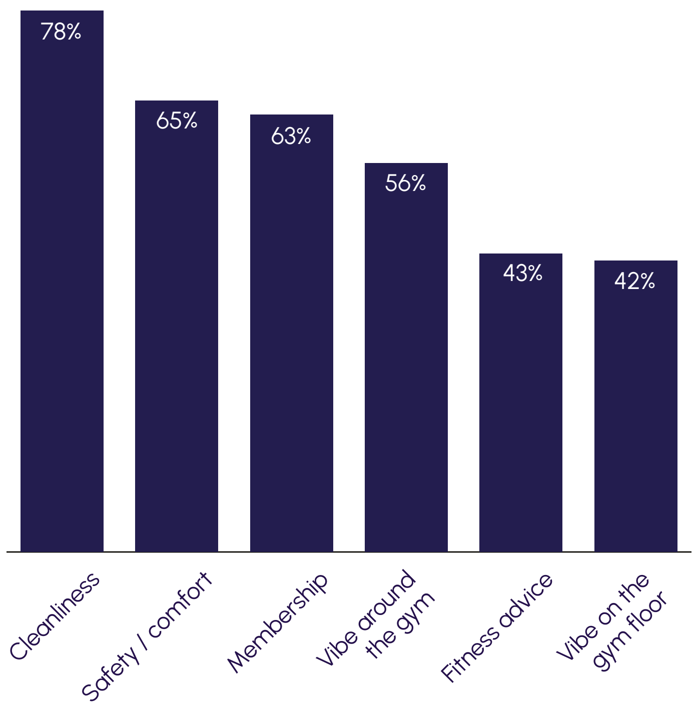
This challenges a long-standing industry assumption. Staff deliver greatest value when supporting smooth operations, maintaining standards and shaping atmosphere, rather than acting as primary sources of technical guidance.

Self-discovery has reshaped fitness. As members source their own guidance, reliance on staff has reduced, clarifying where operators add most value.

We can't make someone fitter - our role is enablement. By providing clean, reliable, interruption-free spaces, we remove friction and support long-term, independent gym use.

Kerry Curtis
CCO, Total Fitness

How important are physical staff in the gym environment to the following categories? ?
Net importance score*, n = 1,894



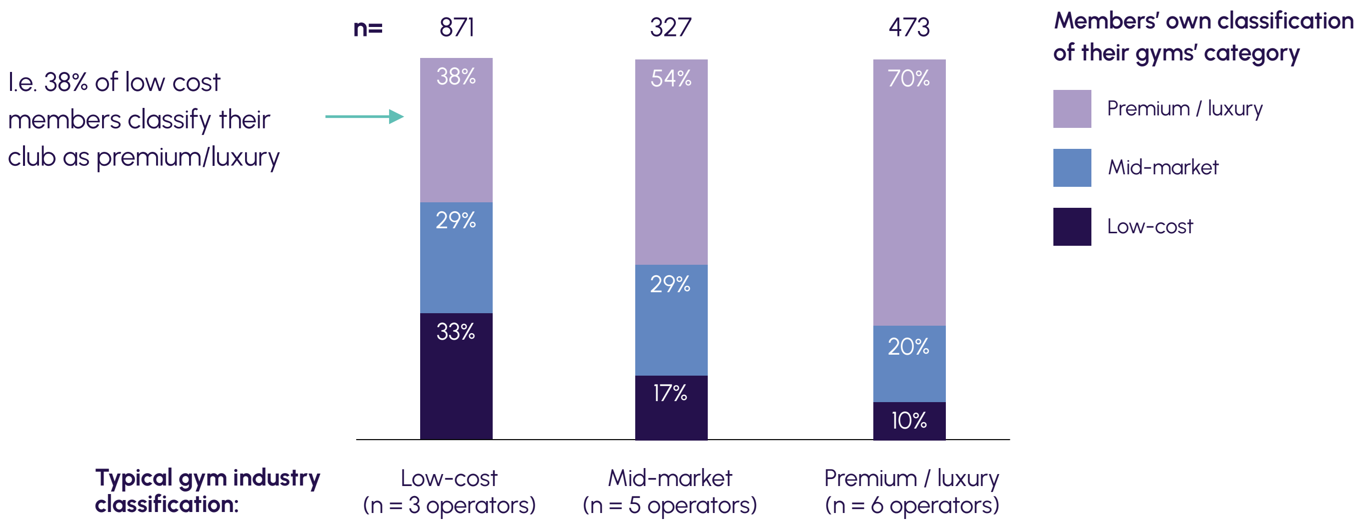
*Net importance score calculated by adding together the proportion of respondents who rated an item as 'extremely', 'very' or 'slightly' important, and subtracting the proportion who said it was 'not important at all'.

Consumers do not categorise gyms by tier

One of the more striking findings is that members rarely think in terms of the industry's low-cost-mid-premium framework. Many struggle to place their own gym accurately within it. Instead, choice is shaped by a more practical set of considerations: proximity, need state, price tolerance and the local competitive set.

For operators, this complicates benchmarking and proposition design. For investors, it reinforces the importance of highly localised offers and execution, rather than reliance on top-down tiering assumptions.

How would you classify your gym provider, by type of gym?
n= 1,671



Thinking in price segments assumes customers do the same and that income alone defines choice. In reality, it doesn't. While lower incomes constrain options, higher incomes don't dictate premium choices. Gym decisions aren't linear. Value is the real driver, shaped by personal priorities as much as by income.

Sophie Lawler
CEO, Total Fitness

Emerging trends

The gym is becoming a social space

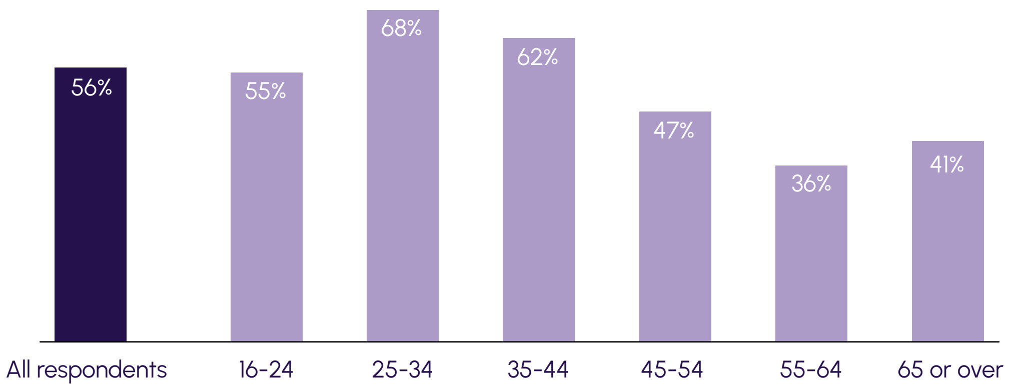
As fitness takes on a more central role in members' lifestyles, the gym is increasingly valued as a social environment. Over half of surveyed gym members (56%) now view their gym as an important part of their social life, with this most pronounced among the younger, higher earning customer base in London (68% versus 52% outside London).

This shift strengthens loyalty and raises expectations around space, community and quality. It extends beyond access to classes, placing greater emphasis on how layout, equipment spacing and floor design support social interaction and group-based activity.

Gyms as social spaces create real capacity challenges. Unlike boutique studios, shared connection is harder to engineer. The opportunity lies in enablement: smart layouts that encourage natural interaction while supporting paired workouts, particularly among Gen Z.

Kerry Curtis
CCO, Total Fitness

To what extent does the gym play a part in your social life?
n= 1,894



Total percentage of respondents answering that the gym is a 'major social hub' and 'somewhat important'.

Technology adoption is accelerating

Technology continues to reduce friction and enhance engagement with the gym experience. Common use cases include performance tracking via apps and wearables, in-workout entertainment, training planning tools – including early-stage AI guidance – and influencer-led content.

Adoption is highest among 25-44-year-olds and strongly correlated with income. Among members earning over £100k, four in five actively use technology to track performance.

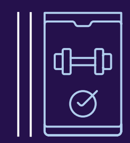
For operators, this is increasingly foundational. Digital integration is becoming part of the expected experience rather than a differentiating add-on.

How important is personal technology during most of your workouts?
n= 1,894

38%
Tracking performance

32%
Entertainment while working out

22%
Influencer content



23%
Planning for me

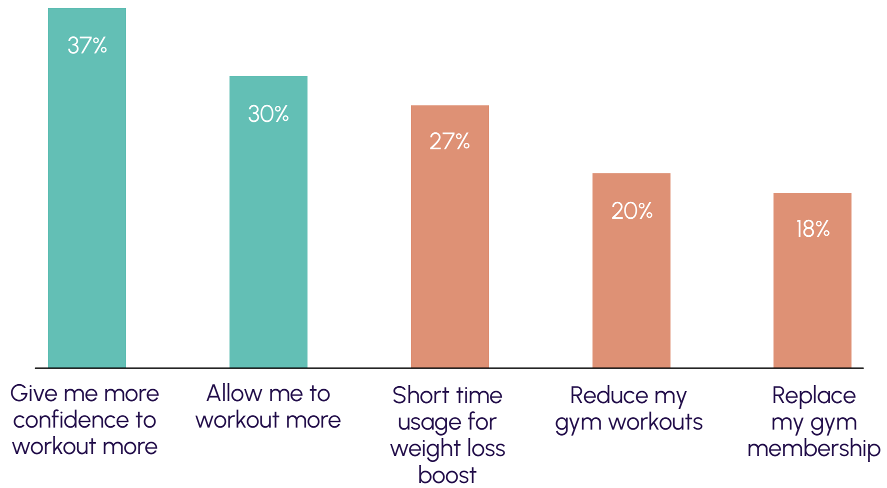
Total percentage of respondents answering 'extremely important' and 'very important'.

GLP-1 medications are expanding accessibility

Around 4% of respondents currently use GLP-1 medications, with a further 12% open to future use. Uptake is highest among younger consumers, with willingness peaking in the 25-44 age bracket.

Importantly, users consistently report that medication supports rather than replaces exercise. Many cite increased confidence, motivation and capacity to sustain activity.

What purpose would (or do) GLP-1 medications play in your life?
n= 793, multiple selections were allowed



Kerry Curtis
CCO, Total Fitness

Confidence and the perceived "right to belong" remain barriers to gym participation, particularly for women. GLP-1 use may help more people cross the threshold. Our role is to support them once inside - by creating spaces that feel welcoming and recognise the effort it takes to show up.

Implications for investors & operators

01

Long-term demand fundamentals are strong

The convergence of key trends – rising participation, gym memberships as protected spend, growing technology use, fitness as a core hobby, the gym's expanding social role, and healthcare-driven accessibility – provides a durable foundation for growth. With penetration still trailing comparable international markets, the UK remains structurally under-penetrated

02

Significant whitespace and spend opportunity remains

Opportunities for expansion are evident across both geography and format. Under-penetrated regions, particularly outside major cities, continue to offer meaningful headroom. Persistent overcrowding across tiers points to unmet demand rather than saturation, while flexible formats – including micro-gyms and convenience-led models – are well suited to commuter and suburban locations.

Consumer behaviour reinforces this opportunity. There is clear willingness to increase spend where propositions are well designed, locally relevant and deliver tangible value.

03

All business models can succeed

The market supports a range of operating models, provided propositions are aligned to local need and executed well.

Low-cost operators benefit from sustained demand for convenience and low friction, including among higher earners. Mid-market gyms perform best where proposition quality and convenience converge, and where capacity is actively managed. Premium operators are positioned to succeed where they address crowding, simplify the commercial experience and integrate functional fitness, social and wellness services in ways that clearly justify price.

Across the market, tech-forward formats are gaining advantage as tracking, personalisation and seamless membership management become expected. More broadly, localised models - rather than rigid tier structures - are best placed to outperform.

Conclusion

The UK gym market continues to evolve, shaped by shifts in health priorities, identity and lifestyle. Membership is increasingly habitual, technology is reshaping expectations, and the role of the gym is widening - from a place to train to a place to connect, recover and belong.

The opportunity ahead is significant. Operators and investors that match their proposition to local demand, manage capacity effectively, integrate technology, and create spaces that people want to spend time in will be best positioned to capture the next phase of growth.

Interested in a deeper discussion?
Please reach out.

CIL Strategy Consultants

CIL is a global growth strategy consultancy. We work with organisations on the decisions that shape growth, from value creation strategies to pricing, data and analytics.

Our approach is rigorous and practical, grounded in deep sub-sector knowledge and careful analysis. We dig into the detail, test assumptions and stress-test every recommendation against the realities of the market. That's how we help organisations see what matters, think ahead, and set clear priorities that lead to confident decisions and strategies built to deliver results.

totalfitness

Total Fitness is a leading health club brand in the North of England and Wales, dedicated to supporting every fitness journey, no matter the age, life stage, or workout preference. With 15 supersize health clubs and the Swim Academy delivering children's swimming lessons across 14 locations, Total Fitness offers a comprehensive fitness experience. In 2024, the brand expanded with two women-only gyms: The Women's Gym by Total Fitness.

Driven by the belief that everyone is better fitter, Total Fitness empowers over 110,000 members with choice, variety, expert support, and spaces to define what's possible.

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