2026 GLOBAL FITNESS REPORT



SECTION 1.

INTRODUCTION

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After a period of resilience and transformation, the fitness sector faces a pivotal moment. The industry continues to thrive, driven by unprecedented levels of uptake and engagement among today's consumers. But challenges remain – and addressing them holds the key to future growth.

Consumers are no longer passive participants; they're informed, empowered, and increasingly vocal advocates for health and wellbeing. This advocacy is shaping the future of fitness, creating communities that prioritize inclusivity, innovation, and holistic health.

The 2026 Global Fitness Report offers vital insights into the modern club member mindset, highlighting key fitness trends, along with deep analysis of current motivations and barriers to working out. It compares new data with findings from previous Global Fitness Reports to offer longitudinal insights into how fitness is changing, and crucially, where it's heading next.

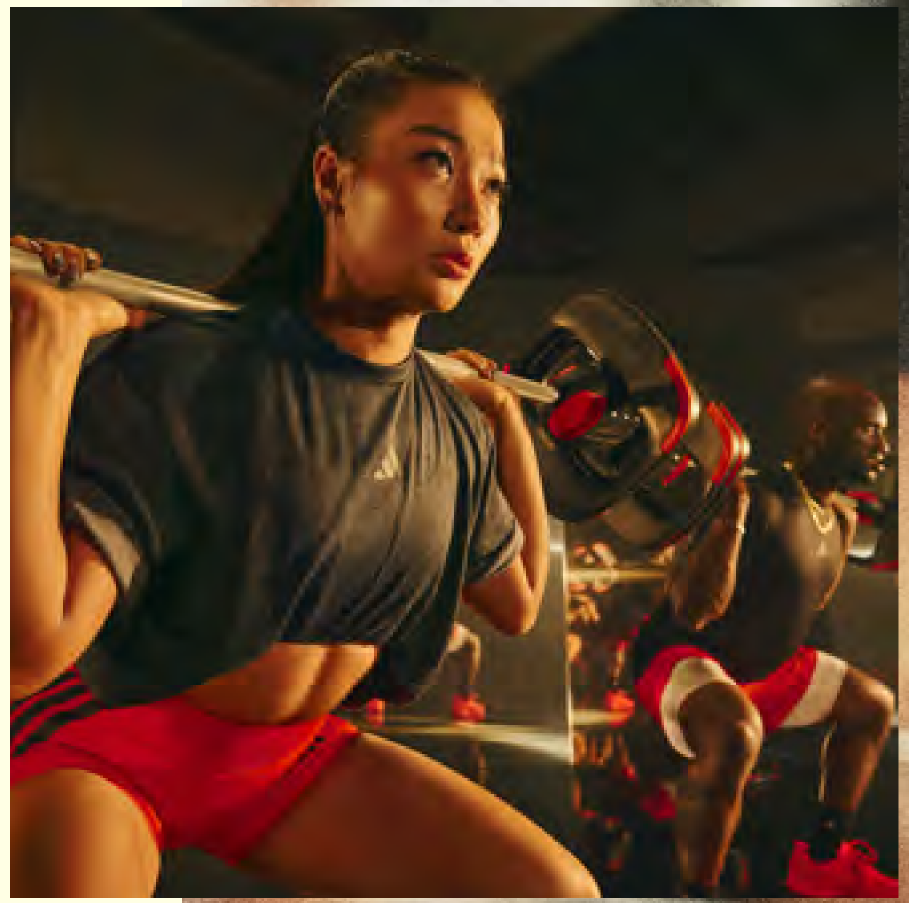
Based on insights from over 10,000 fitness consumers, across 5 continents, this report is essential reading for any club seeking to stay ahead of the competition and drive significant success in 2026. Our research identified four key categories that are covered in this report:

Motivations/Barriers to Training,
The Rise of Strength, The Evolution of Wellness,
and Growth Opportunities.

As we look ahead, it's clear that people remain the driving force behind club growth and retention. From the front desk, to the people leading your workouts, members want to feel deeply connected to a community where real relationships drive motivation and belonging. Their expectations are evolving, and the industry is responding by expanding beyond physical fitness to embrace mental health as an integral component of overall wellbeing.

This report brings these insights and more to life through data-driven analysis, highlighting the trends, behaviors, and opportunities shaping the next era of fitness. Together, these findings reveal how human-centric strategies, underpinned by operational excellence and enabled by technology, will define sustainable growth and retention in a rapidly evolving landscape.

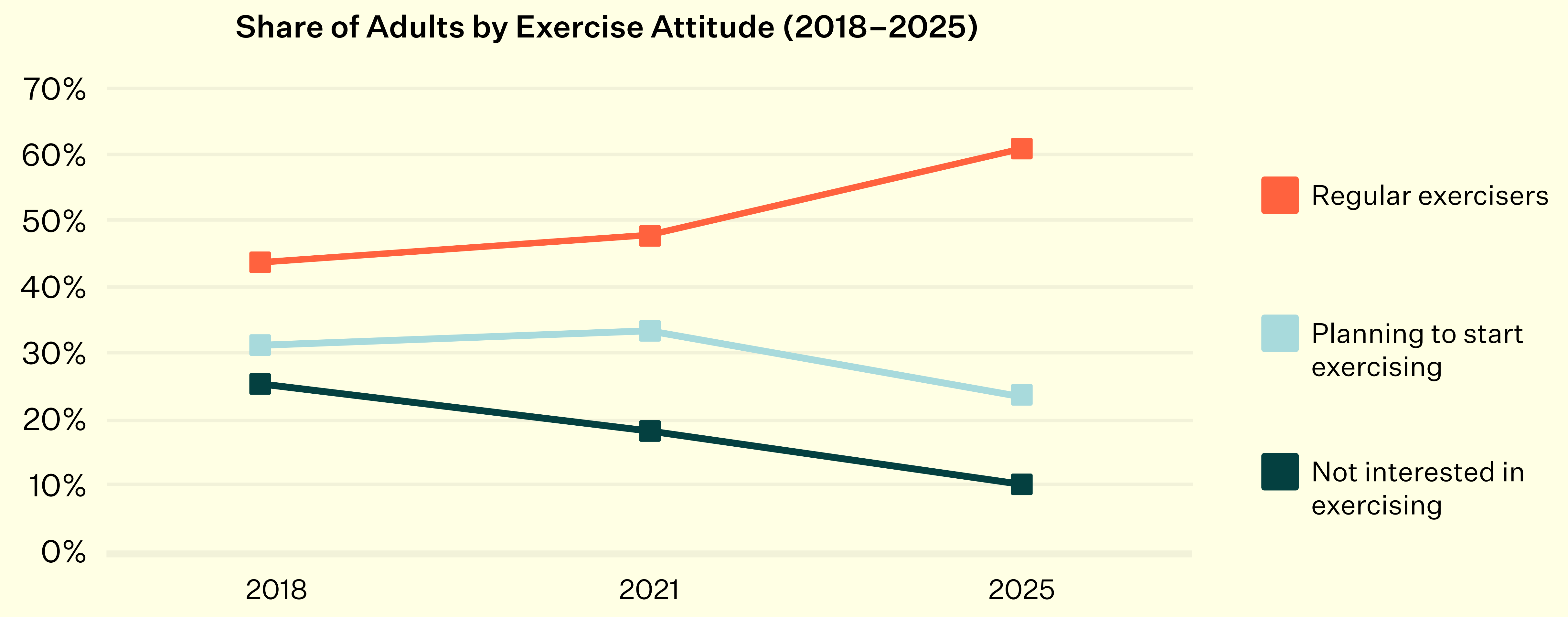
LET'S DIVE INTO THE FINDINGS.

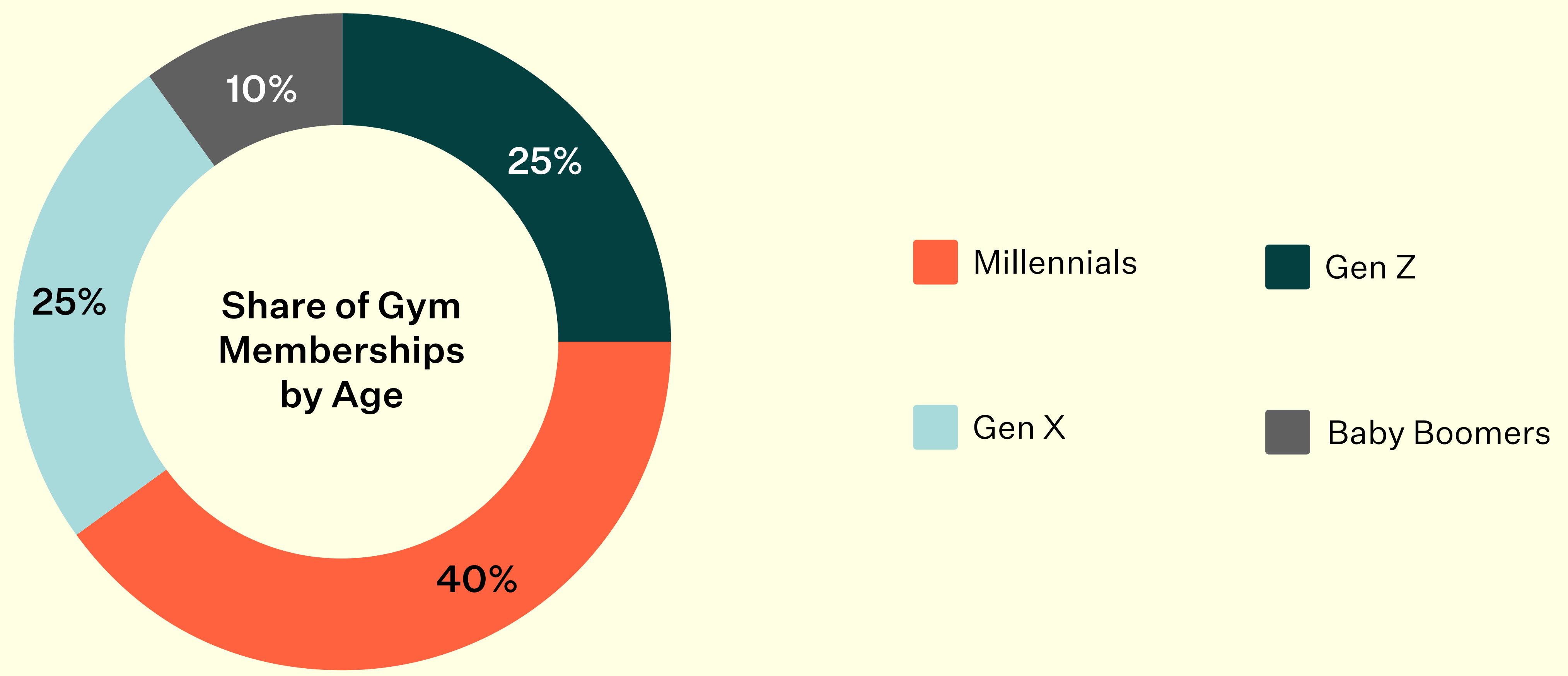


CHANGING ATTITUDES TO EXERCISE

Since 2018, societal attitudes have shifted notably toward more active lifestyles. Regular exercisers now make up 61% of the addressable market – up from 44% in 2018 – while the share of people not interested in exercise has fallen from 25% to 10%, likely reflecting growing health awareness and cultural emphasis on wellness. Meanwhile, those **planning to start exercising** declined from 31% to 23%, suggesting many individuals have turned intent into action.

While Millennials and Gen X dominate gym memberships, Gen Z is a growing segment, offering huge potential for clubs to convert those yet to fall in love with fitness.





*Total adult population

SECTION 2.

MOTIVATIONS + BARRIERS

AVERAGE IS OUT. EXCEPTIONAL IS IN.

Consumers are looking for excitement, intensity, variety and vibes

54%

BRING FRESH FORMATS:
54% of people want to try new ways to get fit*

41%

TACKLE TEDIUM:
41% of all consumers consider working out to be a chore*

64%

TURN UP THE ENERGY:
64% of people are more likely to work out if where they are exercising has a good vibe*

62%

DRIVEN BY CHALLENGE:
62% of younger generations like participating in workouts that push them to their limits**

20%

INNER STRENGTH:
20% of current exercisers work out because it makes them feel empowered

CATEGORIES ON THE RISE:
Dance, yoga, Pilates and run-based workouts are all seeing strong growth

*Total addressable market of current exercisers and prospects
**Younger generations defined as Millennials and Gen Z, Older generations defined as Gen X onward.

37%

Over a third of people (37%) say they don't feel confident working out

REASONS TO WORK OUT: CURRENT EXERCISERS

Motivations to work out are broad, with current exercisers exhibiting an increased desire to get stronger, fitter and look better.

Most notable is the sharp rise in training to manage personal thoughts and feelings. In line with broader cultural shifts around prioritizing holistic wellbeing, those currently working out are chasing physical and inner power.

Accordingly, working out to manage mental health has increased by 29% since 2021, reducing stress has jumped 17%, while having fun and simply enjoying exercise are also significant motivators.

What are all the reasons that you exercise?	2025	2021
To be healthy	57%	53%
To be fitter	49%	45%
To feel good	49%	44%
For mental health	45%	35%
To reduce stress	42%	36%
To help me live a better life*	41%	
To look better	40%	37%
To improve my mood and energy levels*	39%	
To get in / maintain shape	38%	41%
To be stronger	37%	33%
Simply enjoy exercising*	31%	
To have fun	24%	22%
To feel empowered	20%	20%

All regular exercisers
** New question for 2025*

THE EVOLVING PICTURE

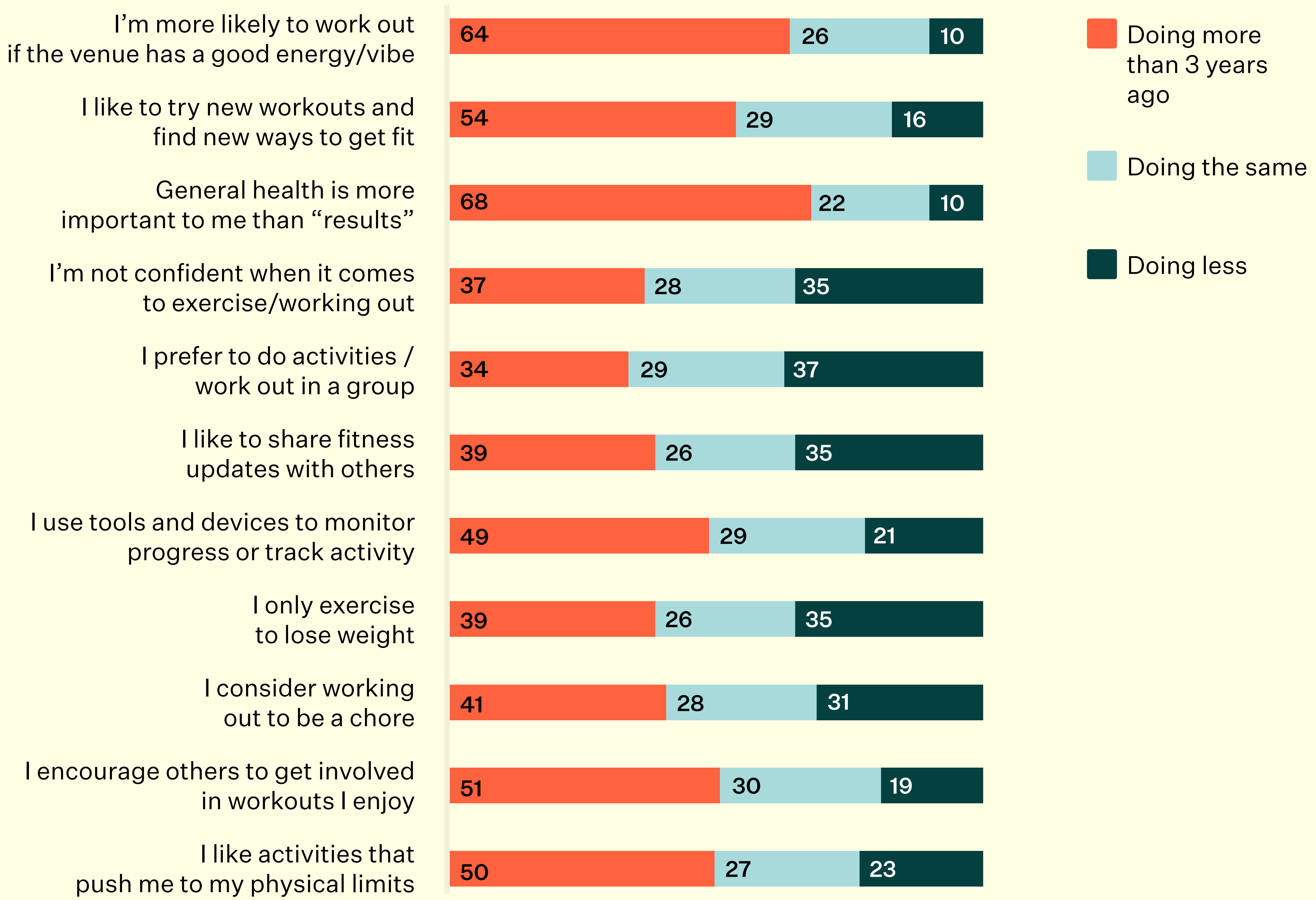
HEADLINES:

- A facility's vibe is an increasingly important decision-driver
- Exercisers are advocating more and sharing workouts they love with others
- Intensity and choice are trending upwards

CHALLENGES TO ADDRESS:

- People are less confident working out now than three years ago
- Increase in the feeling that working out is a chore

Attitude shifts compared to three years ago (%)



Total addressable market
**Figures relate to total addressable market*

WHAT'S DRIVING WORKOUT DECISIONS?

Fitness consumers are more engaged than ever, looking for new ways to get their fix in dynamic, diverse and challenging formats. In recent years, priorities have experienced a subtle but meaningful shift, with all age groups agreeing that feeling good about movement and health is more important than 'results', and that fitness is a major part of living a balanced and healthy lifestyle

SEEKING VARIETY

54% of consumers are looking for new workouts and ways to get fit, and 41% say they find working out a chore. This indicates latent demand for greater variety, presenting clubs with a clear opportunity to boost retention by engaging members who have yet to discover workouts that truly resonate with them. Done well, operators can inspire deeply engaged advocates who place their club at the heart of social plans. Once members find a workout that clicks, they want to share it: 51% of regular exercisers encourage friends to take part in it, too.

HERE FOR THE VIBE

When it comes to choosing where they work out, experience and ambience are key decision drivers. An unimaginative environment is now more likely to cost operators members, or at least compromise attendance: 64% of people say they're more likely to work out if there's a good vibe. And half of all current exercisers are looking to challenge themselves to hit new PBs and maximize the time they spend at their club – seeking workouts that push them to their physical limits.

54% of consumers are looking for new workouts and ways to get fit

54%

A GENERATIONAL DIVIDE

Over the past three years, inter-generational differences have emerged that clubs are well positioned to support. Driven by their desire for sociability, younger generations — comprising Gen Z and Millennials — now expect more from their club. The impact of a facility's vibe has grown by 63%, and within that, choice is a key factor.

Younger generations want more — and they're spreading the word. Demand for workouts that push limits has surged 54% among this cohort, who are also becoming powerful advocates. In the past three years, their tendency to encourage friends to join the workouts they love has jumped 53% — nearly double the 27% uplift seen among older generations.

Attitude shifts over 3 years by generation	Younger generation	Older generation
I'm more likely to work out if the venue has a good energy/vibe	+63%	+50%
General health is more important to me than "results"	+60%	+63%
I like to try new workouts and find new ways to get fit	+54%	+32%
I encourage others to get involved in workouts I enjoy	+53%	+27%
Fitness is only a small part of a balanced and healthy lifestyle	+49%	+50%
I like activities that push me to my physical limits	+47%	+24%
I use tools and devices to monitor progress or track activity	+47%	+20%
I like to share fitness updates with others	+35%	-4%
I consider working out to be a chore	+10%	-10%
I only exercise to lose weight	+9%	-9%
I'm not confident when it comes to exercise	-3%	-17%

Total addressable market

WHAT MOVES THE NEXT GENERATION?

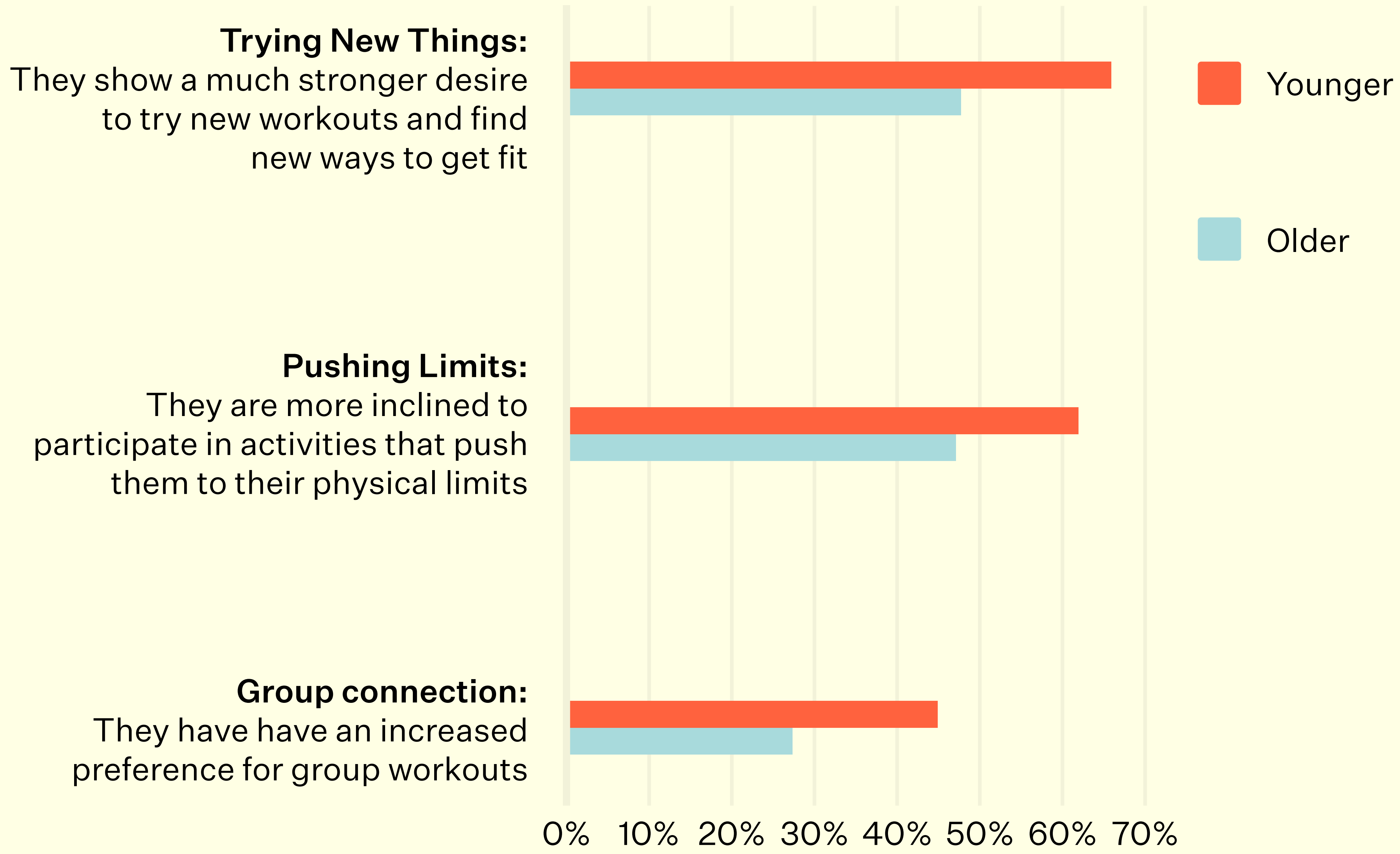
The new generation of members crave social experiences and there are clear differences between what younger and older generations seek from their training. Segmenting audiences and marketing to them by their workout preferences enables clubs to deliver more personalized experiences, increasing member engagement, satisfaction, and long-term loyalty.

Key differences, reflected in the graph, include trying new things, pushing limits and group connection.

Many younger consumers are enjoying a wide range of activities that service their appetite for variety and maximum effort. But there is also a cohort of young people who are searching for workouts that inspire. The share of younger consumers who view working out as a chore has risen by 10% over the past three years. This presents operators with an opportunity to capture a new generation of members by dialling up the social aspects of their clubs – reducing the risk of boredom and boosting retention by providing more reasons to return.

While there's no need to take an exclusionary approach, adapting and marketing your offering to suit the generation(s) you are targeting shows you understand their needs and are well-positioned to meet them. And with both demographics agreeing they are more inclined to try new workouts and ways to get fit, marketing new workouts or offerings at your club should take a cross-generational approach in order to maximize your reach and drive retention.

Key differences between generations



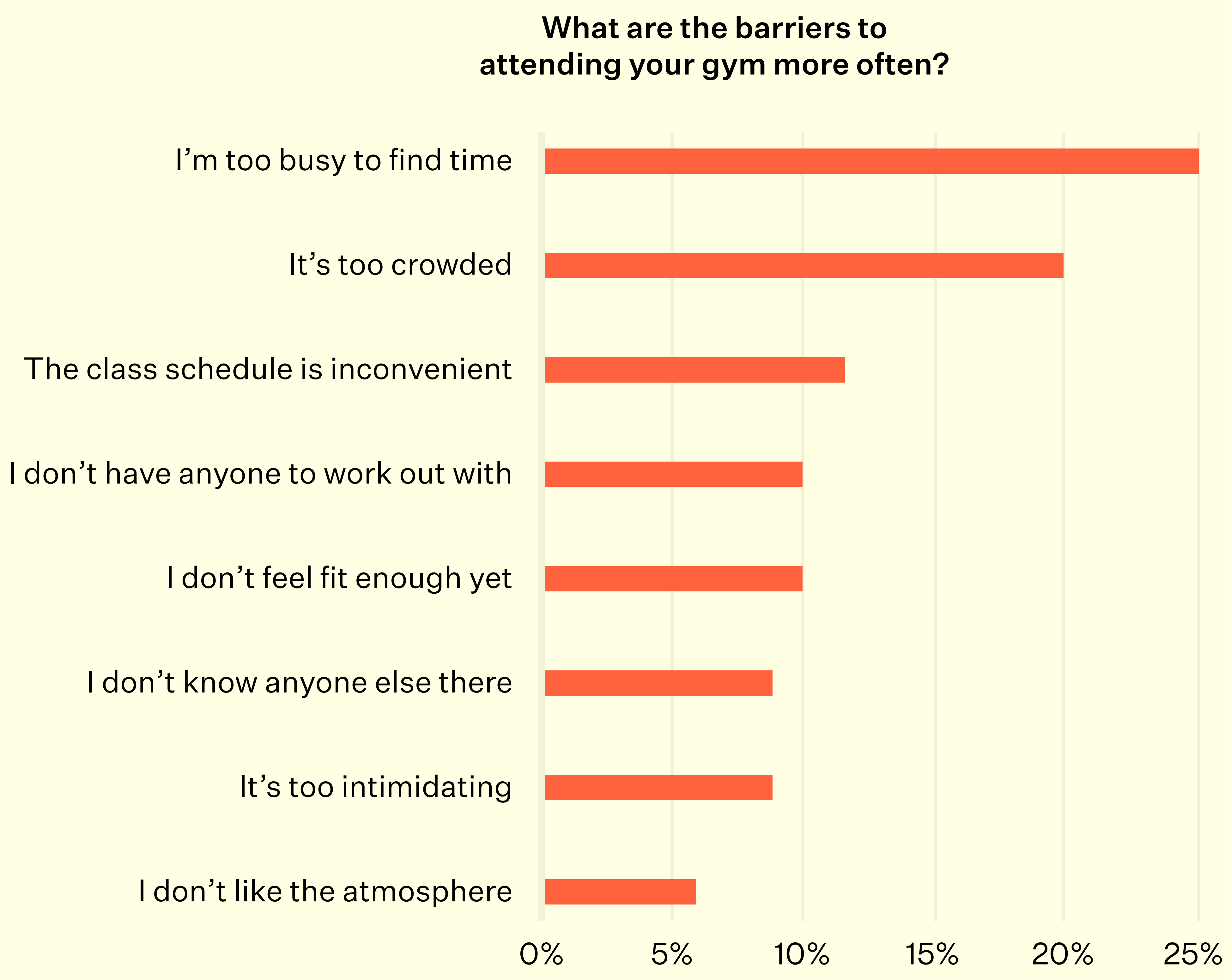
Total addressable market

ATTENDANCE ROADBLOCKS

Barriers are often hidden gateways to growth, as many of the reasons given for low attendance show. Operators who adapt quickly to turn challenges into opportunity can reap substantial rewards.

A quarter of current gym members say they're too busy to find the time to attend their facility more often, but this can sometimes mask motivational issues. Onboarding or routine check-ins with members that encourage honest conversation around availability is the first step to challenging this belief. Educating members around what's possible in the time they have dispels the notion that every workout needs to be lengthy and encourages them to incorporate shorter, time-efficient visits to their club.

Similarly, an inconvenient class schedule and a crowded gym floor are two sides of the same coin. Surveying members, studying check-in data and scrutinising the performance of your timetable can help operators to ease traffic on the gym floor by better servicing peak periods with extra classes. 12% of members say their club's class schedule is inconvenient, while 20% find their gym too crowded – which could also be a factor for the 8% of members who find their facility intimidating.



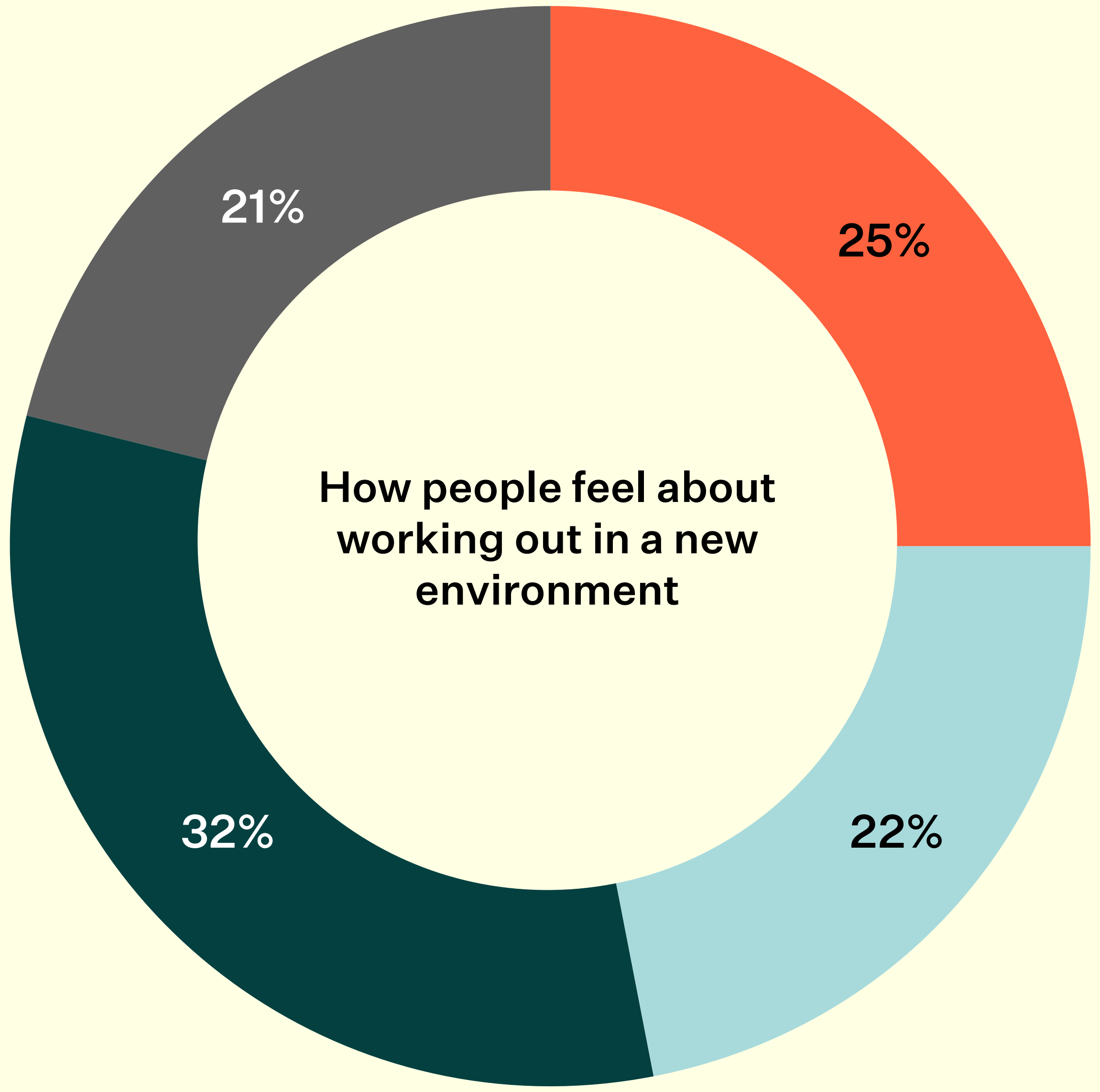
Current gym members

BRIDGING THE CONFIDENCE GAP

While novel, new isn't always welcomed. Respondents shared their concerns about working out in public spaces or unfamiliar environments. A quarter shared their fears around being judged, leading them to spend more time observing than 'doing'.

But they also shared practical steps to help them rebuild confidence, giving clubs valuable insight into the tools and strategies needed to support members. Nearly a third (32%) are motivated by the idea of a clear plan that sets them up for success, while a further 22% are fueled by the guidance of an Instructor or workout partner. Establishing what members' barriers are as early as possible can set them up for success and put you in the strongest possible position to secure their loyalty long-term.

When asked what boosts confidence, 27% cited clear progress, 21% valued encouragement from trainers in a supportive environment, and 18% said knowing what they're going to do before they start.



- I feel uncertain and often worry about doing things incorrectly or being judged. I spend more time observing than doing
- I feel most comfortable when I'm following a class instructor or a workout partner. I'm hesitant to do things on my own
- I feel confident as long as I have a clear plan. I stick to what I know and feel comfortable with the exercises and equipment I'm familiar with
- I feel completely at ease. I can walk in, adapt my plan, and use almost any piece of equipment with confidence

Total addressable market

BUILDING LASTING HABITS

"Most people understand the value of exercise for good health, but far fewer put this into practice to lead a consistently active lifestyle."

"Supporting a club's new and existing members to implement and maintain healthy routines comes down to developing factors such as strong preparation and instigation habits to help boost their long-term adherence. Research shows that exercisers who include these types of behaviors in the early stages of their routine attend up to 200% more often than those who don't* – proof that small habits drive big results for both individuals and operators.

Many members believe they don't have time to attend their club more often, but a great onboarding experience is an honest conversation around what time is available, supported by targeted workouts and exercises that ensure they set off at the right pace. Workouts that require newcomers to exercise through to exhaustion can be a turn off, so encourage them to start light. This will ensure they stay intrinsically motivated, meaning they're exercising for its inherent satisfaction, rather than an external reward."

- BRYCE HASTINGS, LES MILLS HEAD OF RESEARCH

¼ of all current gym members say they are too busy to attend their club more often

25%

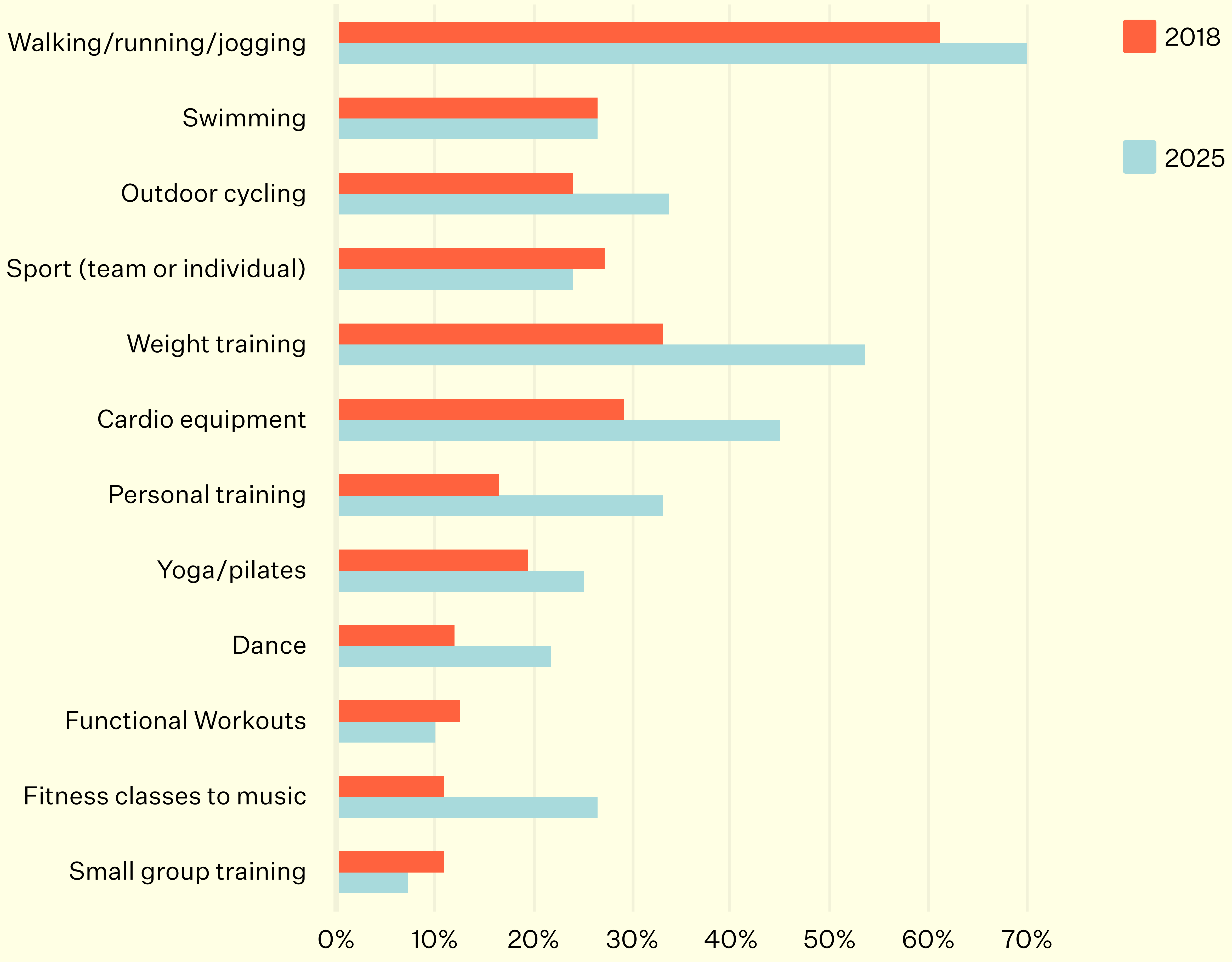
Les Mills Lab and Iowa State University 2024

KEY ACTIVITIES: CURRENT EXERCISERS

In keeping with the prevailing desire for a broad range of activities, regular exercisers are casting their net wide. With run clubs in ascension, and Gen Z in particular choosing to join groups for connection* walking, running and jogging show strong participation.

Exercisers are picking and choosing from the full range of category availabilities: Weight training, outdoor cycling and cardio are popular, while appetite for boutique and wellness-related activities sees yoga and Pilates trending upwards. And thanks to a TikTok-driven wave of cultural momentum, dance is having a major IRL comeback.

Participation in activities among regular exercisers



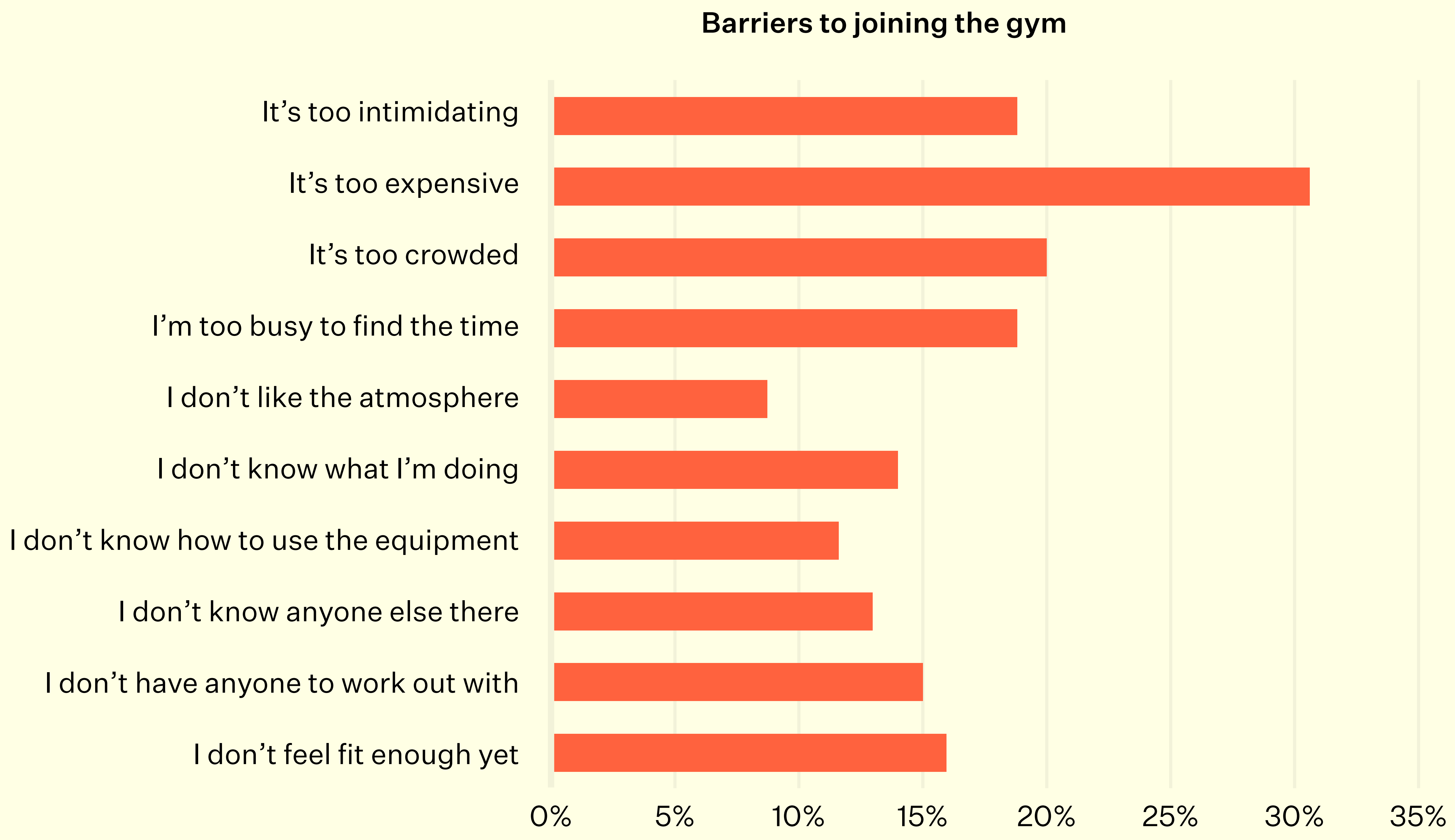
Total addressable market
**Strava Mid-Year report, 2025*

BARRIERS TO JOINING THE GYM

For those in the consideration phase, barriers to joining a gym are largely confidence-driven. Costs aside, prospects feel intimidated, concerned about busy gym floors, and lack knowledge of how to use equipment.

They're also in search of buddies. Nearly a quarter (24%) say they're put off by the fact they don't know anyone else at their gym or don't have anyone to work out with.

Intentional marketing that spells out exactly how your facility can meet these needs is the first step to nurturing nervous prospects. Connection is the single-most important factor in joining a gym*, so ensuring your facility delivers on community (and your marketing clearly reflects this) is essential. Equally, with 14% of respondents admitting they don't know what they're doing, putting your team front and center of your marketing – especially on socials – demonstrates support is on hand. Showcasing their expertise and approachability helps reassure prospects by breaking down stereotypes of intimidating gym environments and making fitness feel inclusive, supportive, and beginner-friendly.



All non-gym members,
**ABC Wellness Watch Fall 2025*

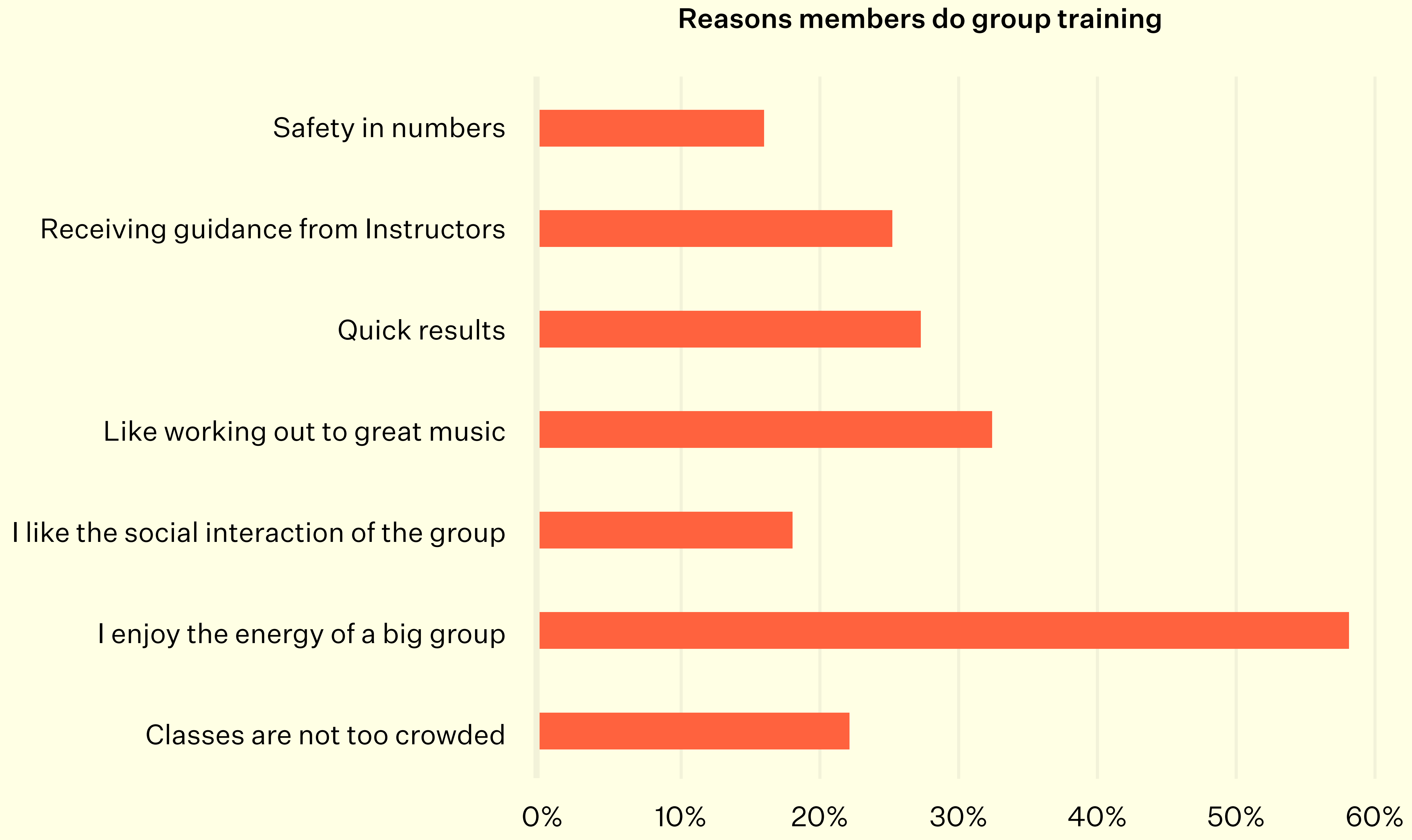
TOP REASONS MEMBERS CHOOSE GROUP TRAINING

With prospects battling anxiety around equipment and crowds, members already taking part in group training have discovered that the studio is a great source of connection and autonomy.

Current participants list energy, guidance and music as their top drivers for showing up.

And group training is recognized for its ability to unlock action. Despite motivation to train solely for aesthetics decreasing in recent years, getting healthy, stronger and feeling fitter are all on the rise. Exercisers acknowledge that the studio is a powerful way to achieve those goals: the third biggest motivator for taking part in group training is for the quick results.

Social interaction is high on the agenda, too, with safety in numbers providing the community and support many prospects crave.



All regular exercisers who do group training

SECTION 3.

STRENGTH

STRENGTH STRUGGLES: CONFIDENCE MATTERS

It's not just novice lifters who are seeking guidance

58%

KNOWLEDGE GAPS

58% of those already taking part in strength training say conflicting advice makes it hard to know how best to train

54%

FAILURE TO LAUNCH

54% of all aspiring lifters don't know where to start

30%

PLATEAU PROBLEMS

30% of exercisers who consider themselves advanced lifters are unsure of how to progress

50%

HEAVY BURDEN

50% of aspiring lifters feel intimidated by the weights area of a gym

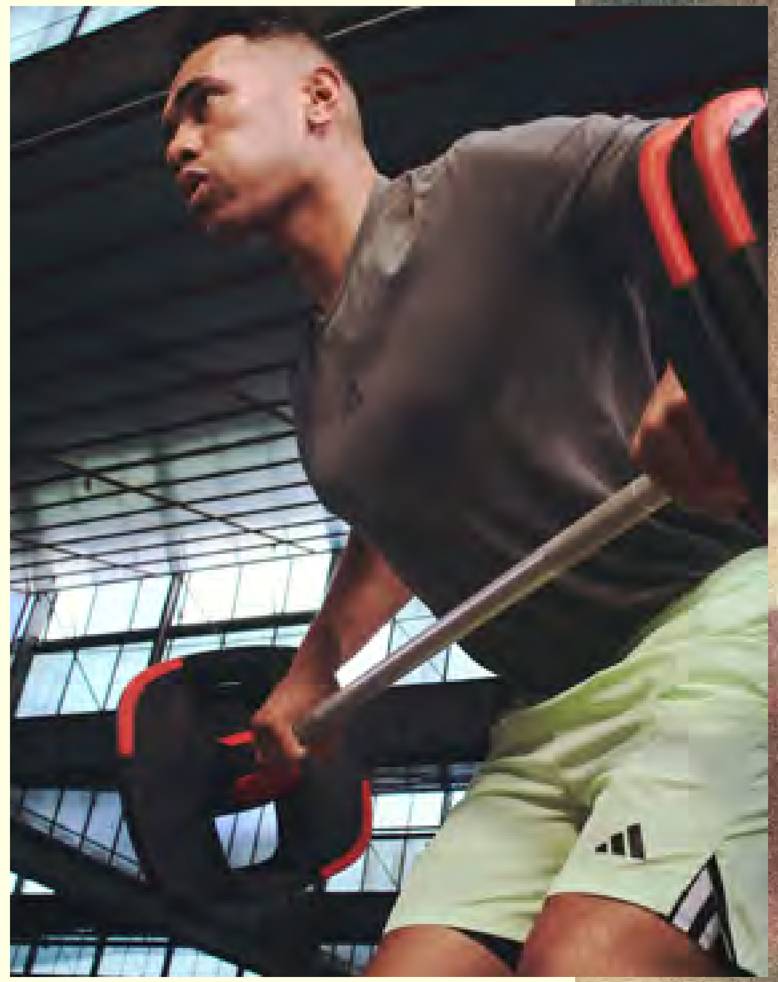
54% of aspiring lifters and 58% of current lifters say too much conflicting advice makes it hard to know how best to train strength

54%

58%

HOW STRENGTH BECAME A STAPLE

Once the domain of a dedicated few, strength training has exploded into the mainstream, becoming the new default for a complete workout. Across gym floors, a majority of members now consistently include some form of strength work in their week, utilizing free weights, machines, and their own bodyweight. The growth is also evident in group training, where strength-based formats are now the most popular category. This boom is fuelled by a collective shift towards valuing functional health and longevity over pure aesthetics. Today, being strong also means feeling good.



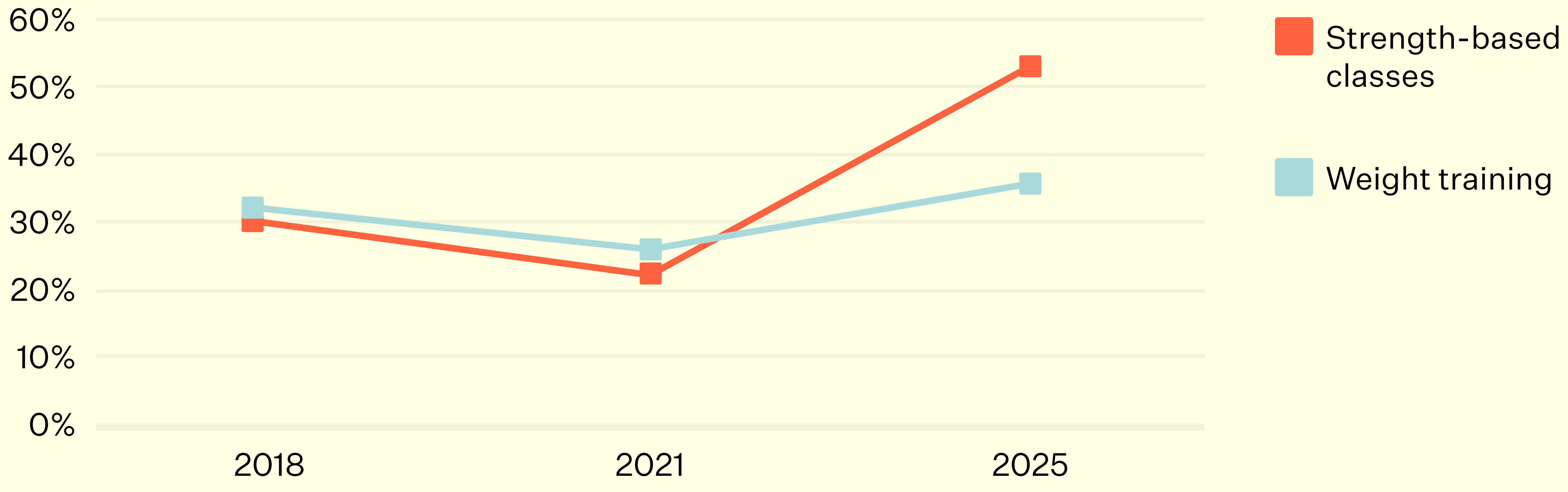
FEEL STRONG, TRAIN STRONG: FITNESS GETS HEAVY

Over half of regular exercisers include some form of weight/strength training in their routine, and more than half of this group train strength three or more times per week.

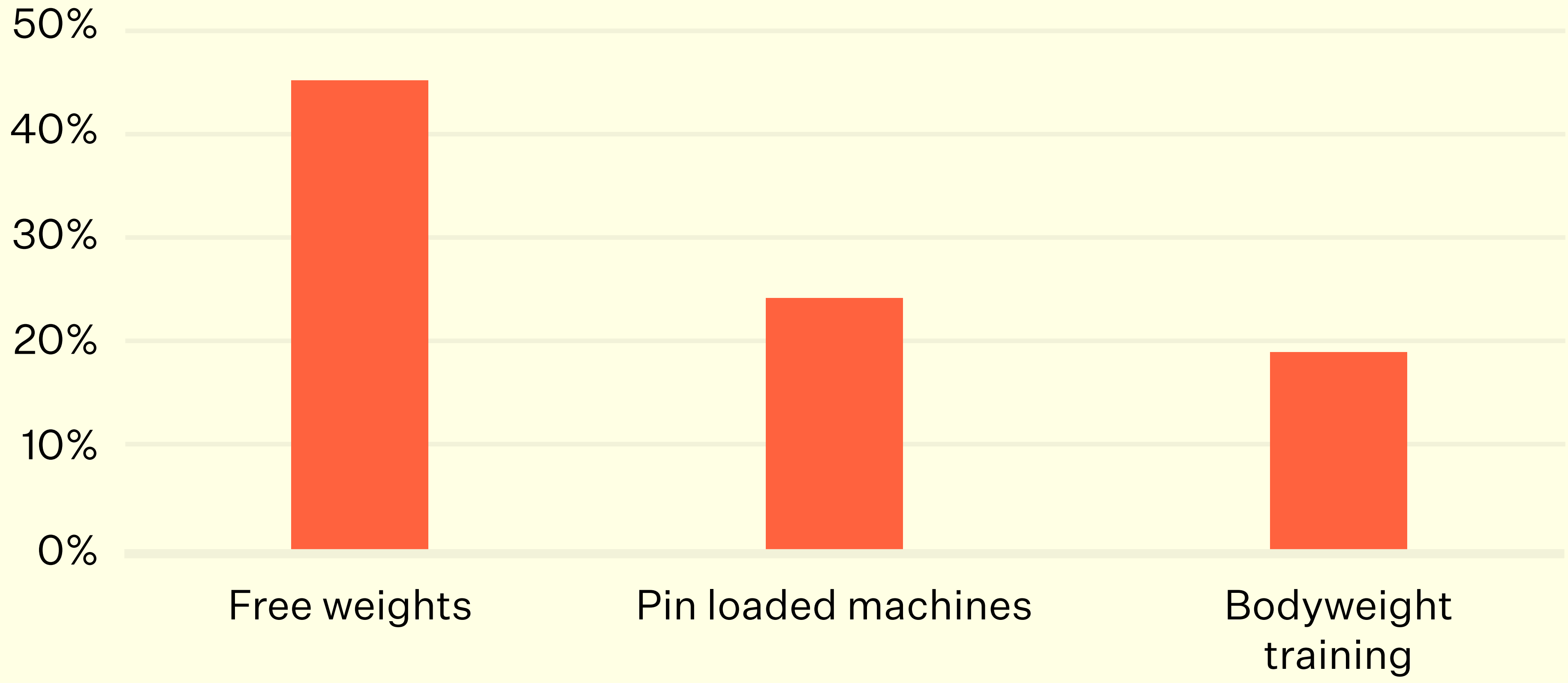
Free weights are most popular, however pin-loaded and cable resistance machines are also in demand.

Strength training is now the leading group training activity, with participation rising from 30% in 2018 to 36% in 2025. However, 33% of current lifters state they feel out of place in the weights area, highlighting an opportunity to engage these members with strength classes.

Participation in strength-based activities (regular exercisers), 2018-2025



Participation in strength-based activities (regular exercisers)

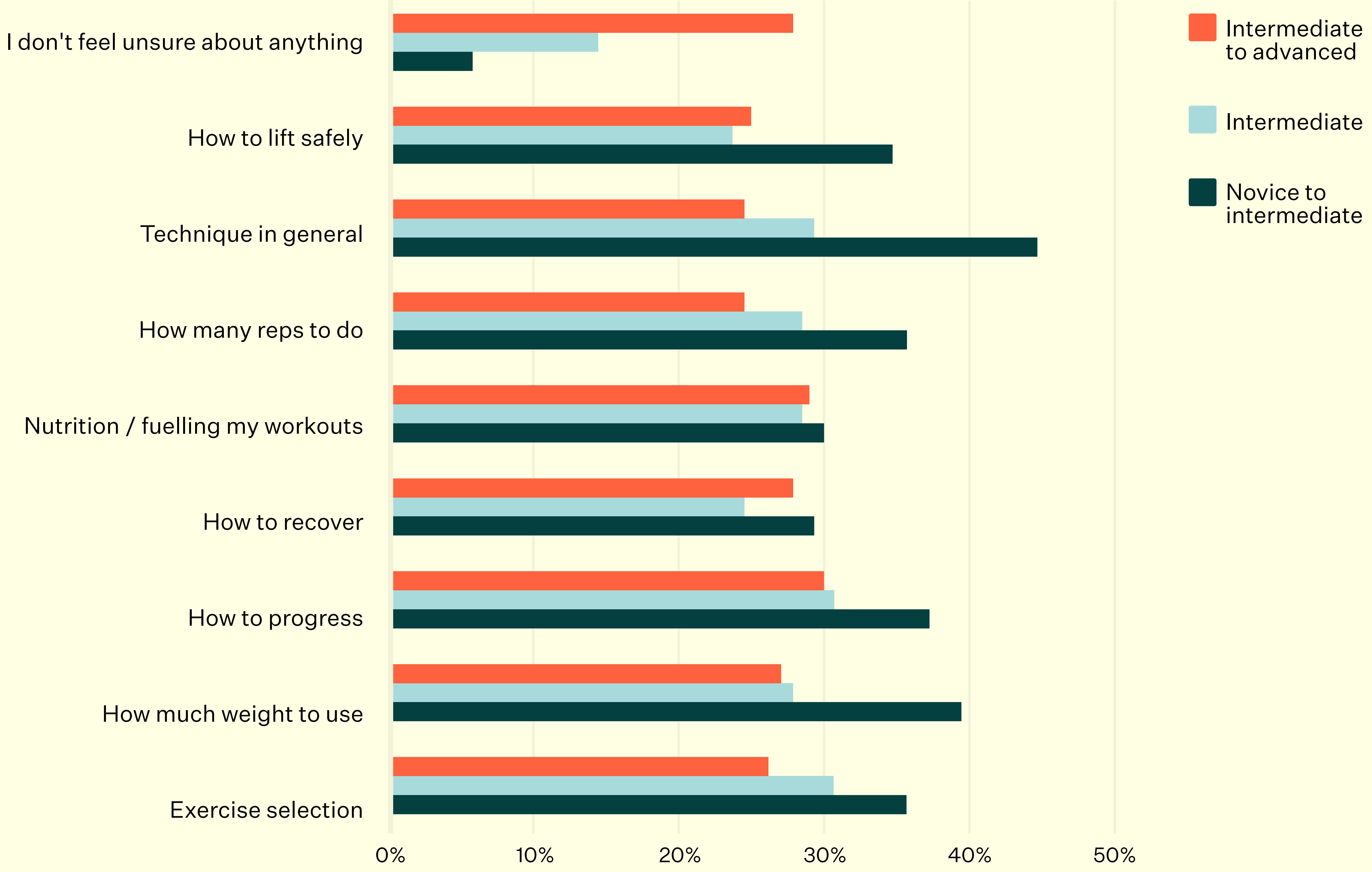


HOW TO HELP LIFTERS GO FURTHER

Digging into current lifters' fears reveals a range of concerns across abilities. Irrespective of experience levels, there is consistent uncertainty around progression, how much weight to use, and which exercises to select.

Of those who consider themselves novice to intermediate, technique is top of mind, with nearly half (44%) citing this as their biggest pain point, followed by knowing how much weight to use (39%), how to progress (37%), how many reps to do (36%) and how to lift safely (34%).

Current lifters who identify as advanced are still challenged by recovery, progression and how much weight to use, revealing the universal opportunity for operators: irrespective of ability, members are seeking guidance to get the most from their workouts.

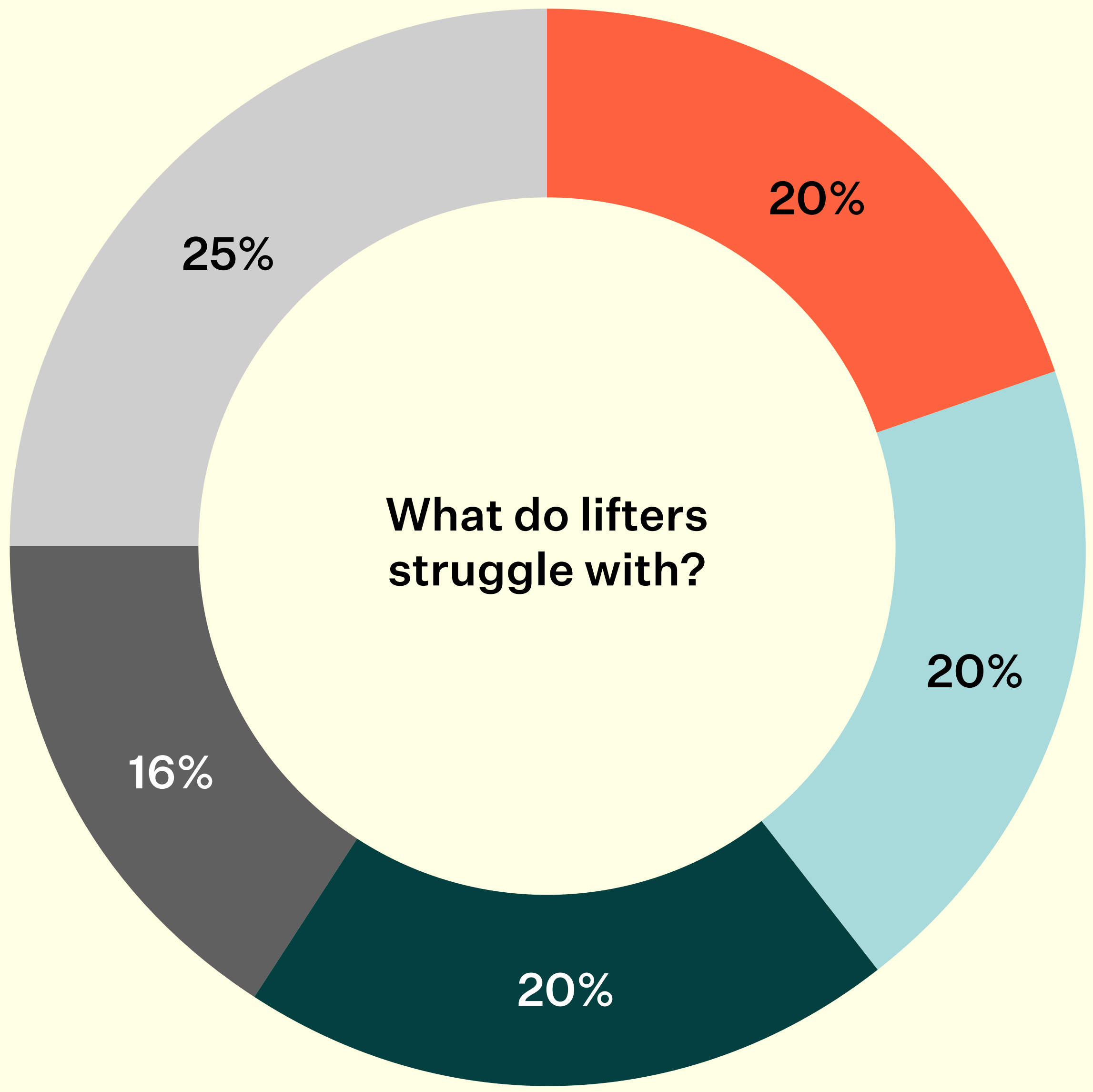


All regular exercisers currently doing equipment-based strength workouts

WHAT MAKES LIFTERS A FLIGHT RISK?

Despite strong levels of engagement among current lifters, threats remain for operators. Across all age groups, the leading frustration is the disconnect between effort and visible results. Despite consistent training, many feel the work they put in on the gym floor isn't being reflected in their physique.

Supporting members to overcome hurdles is a key retention play. Educating lifters on how to nail technique and overload ensures progression, increasing satisfaction with their workouts and reducing risk of their frustration turning them into a flight risk.



- The feeling that I don't belong, don't know what I'm doing, or I'm being judged by more experienced people
- The pressure to lift a certain amount or look a certain way, driven by social media or others in the gym, which diminishes my own progress
- The mental block of inconsistency – feeling like if I miss a few workouts, I've failed and might as well stop altogether
- The fear of failing a lift or not being as strong as I think I should be, which holds me back from truly pushing my limits
- The frustration when the physical changes I see in the mirror don't seem to match my immense effort and consistency

32% 32% of current lifters say completing difficult physical tasks with ease is their biggest win from strength training

All regular exercisers currently doing equipment-based strength workouts

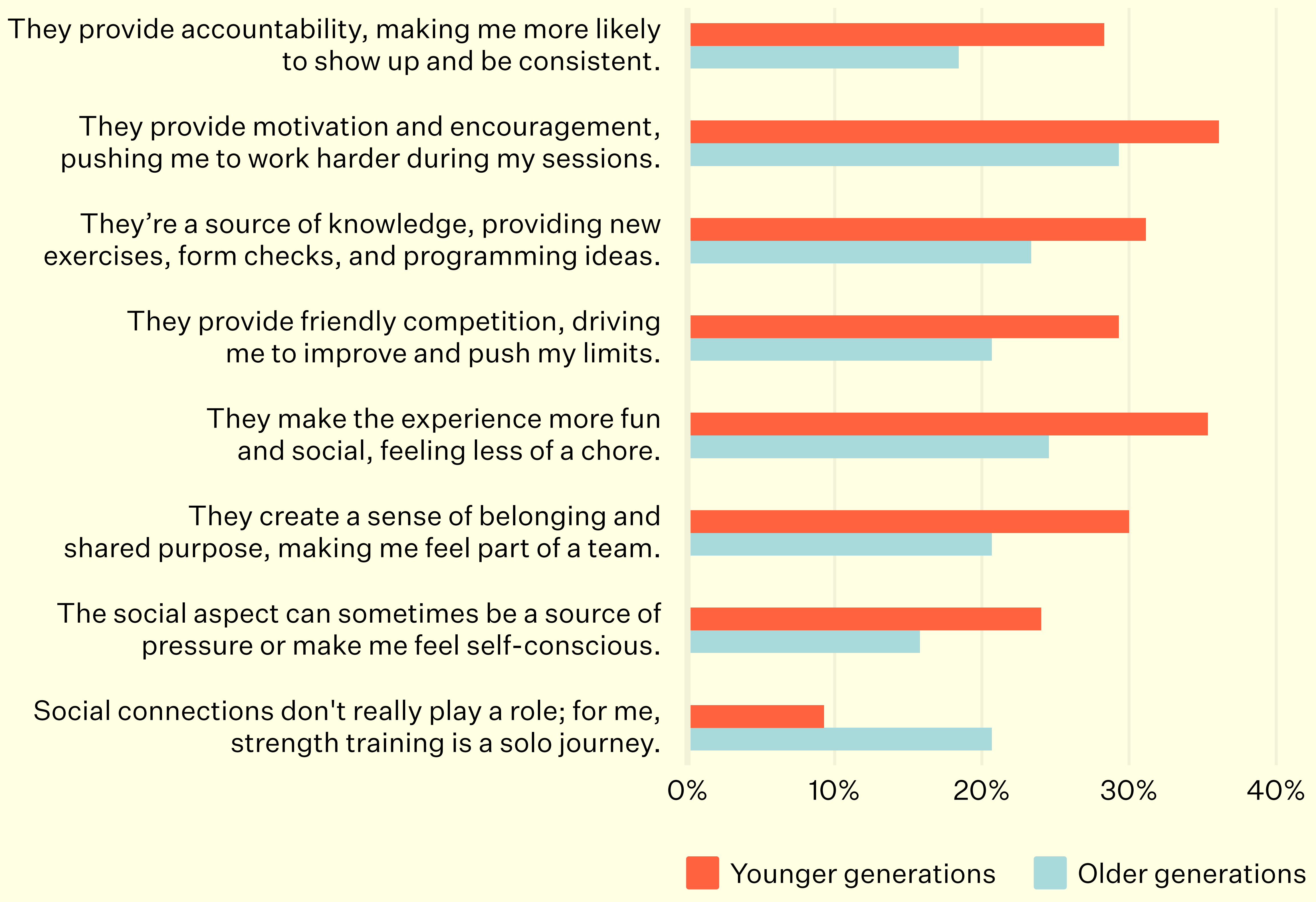
THE ROLE OF COMMUNITY IN STRENGTH TRAINING

It's well known that younger generations are increasingly drawn to the gym for more than just fitness – it's a hub for social connection, self-expression, and achievement. Many are rejecting traditional nightlife activities to prioritize spending time at the gym – but they want their buddies there with them.

Younger generations show a clear preference for strength training that fosters social connection. Over a third (36%) cite friends as a source of motivation and encouragement, pushing them to work harder in their strength training, while 35% say friends make the experience more fun and social, changing training from something chore-like, to an enjoyable activity.

Older generations report similar benefits, though with less intensity. For many, working out with others still provides motivation and camaraderie, but strength training is more often viewed as a personal journey. In fact, one in five individuals over 40 say social connections play no role in their training, underscoring a more introspective and self-directed approach to fitness.

The role of group in strength training journeys



All regular exercisers currently doing equipment-based strength workouts

THE WEIGHT TRAINERS IN WAITING

Gyms are perfectly positioned to overcome the biggest hurdle facing adults considering starting weight training: lack of equipment. One third cite this as the primary reason they have yet to begin lifting.

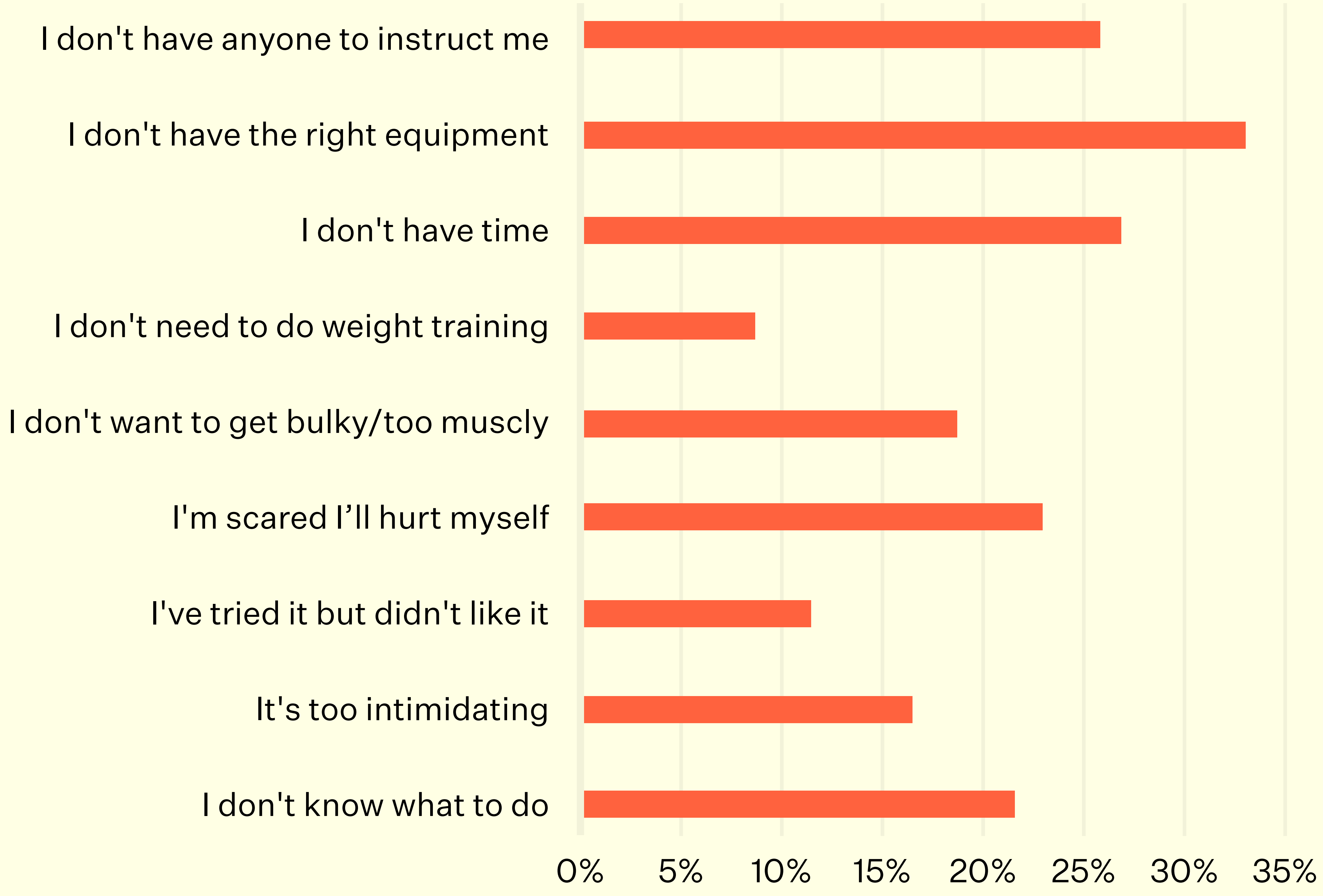
Unsurprisingly, the need for guidance is strong. Over a quarter of aspiring lifters seek instruction on the best way to start, and 22% simply don't know what to do. Both issues offer clubs the chance to ease concerns with a human-led, science-backed approach – one that sets novices up for success, encourages open dialogue, and fosters lasting confidence.

FEAR FACTOR

Fear is another key barrier: 23% of people express concerns about potential injury, while 17% perceive weight training as intimidating.

Some individuals are grappling with misconceptions: 18% worry that weight training will lead them to become bulky or overly muscular, but with a range of strength options at clubs' disposal, educating members on what strength workout is best for them can help allay these fears.

Attitudes towards strength training (all adults interested in strength training)



All adults not currently strength training but considering it

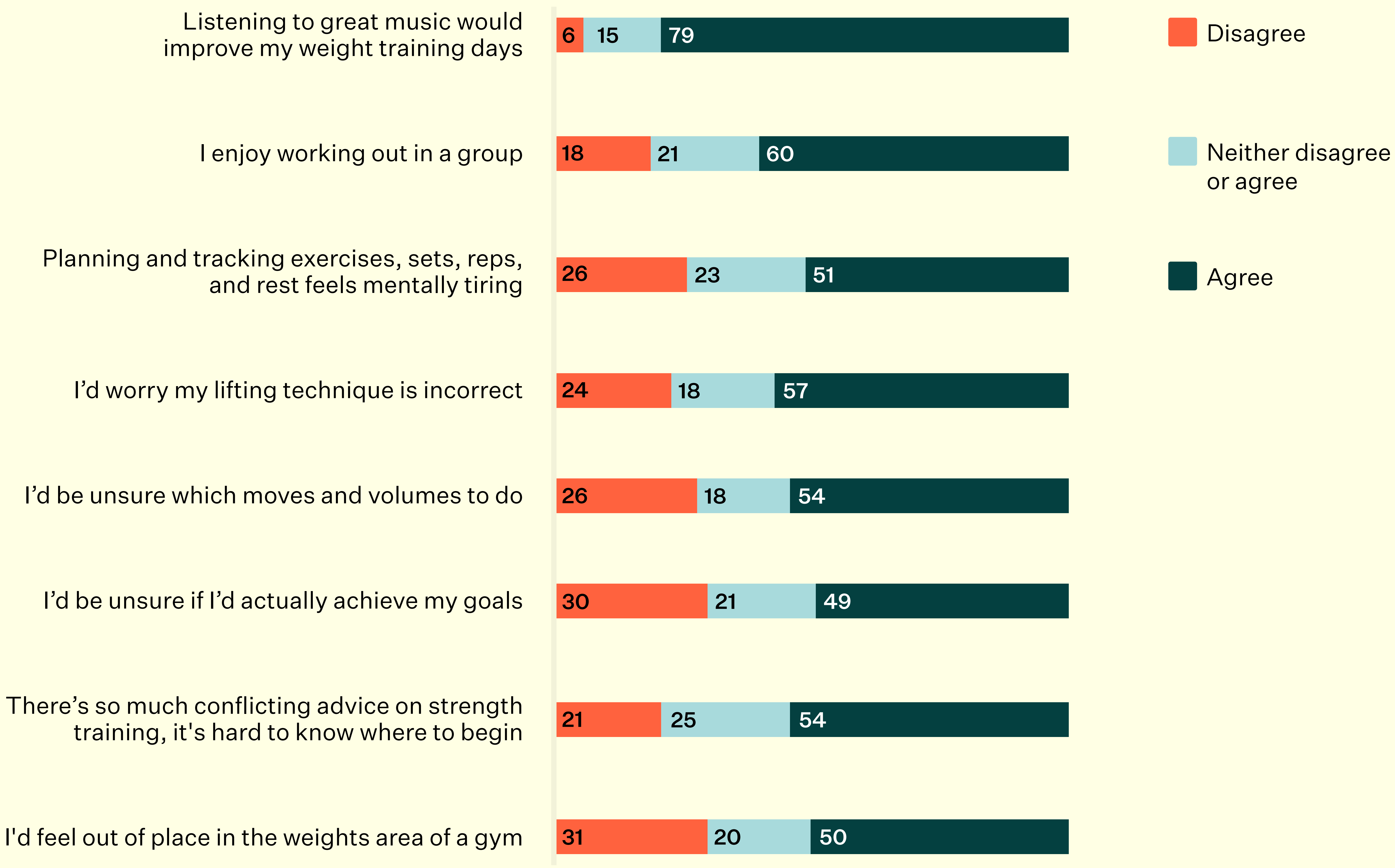
ASPIRING LIFTERS IN FOCUS

Aspiring weight trainers express a mix of enthusiasm and apprehension. Over half (60%) love the idea of working out in a group, indicating a strong desire for camaraderie that could make the transition into strength training less intimidating.

However, many harbor doubts: 50% fear feeling out of place in the weights area, while 49% are unsure if their efforts will genuinely help them achieve their goals. The overwhelming array of conflicting advice about strength training confuses, with 54% saying it makes it hard to know where to start. There's also significant hesitation regarding technique – 48% worry they might not perform exercises correctly. The logistics of planning workouts are daunting too, with 52% finding the thought of tracking exercises, sets, and reps mentally tiring before they've even begun.

Group lifting programs could reduce the key concerns of this demographic by fostering a supportive environment where participants can motivate and learn from one another.

Attitudes towards strength training (%)



All adults not currently strength training but considering it

SECTION 4.

WELLNESS

GYMS: POWERING POSITIVITY

Mental health and wellness is a top priority: and members want to service it at their club

94%

HAPPINESS HACK
94% of members say the gym is among the most important tools in their wellness toolkit

59%

GROWING APPETITE
59% of gym members would like to see yoga, breathwork or meditation on their timetables

46%

JOY DRIVER
Gym members are 46% more likely to feel very happy with their personal wellness than non-gym members

29%

NEW NORMAL
Motivation to exercise for mental health has increased by 29% since 2021

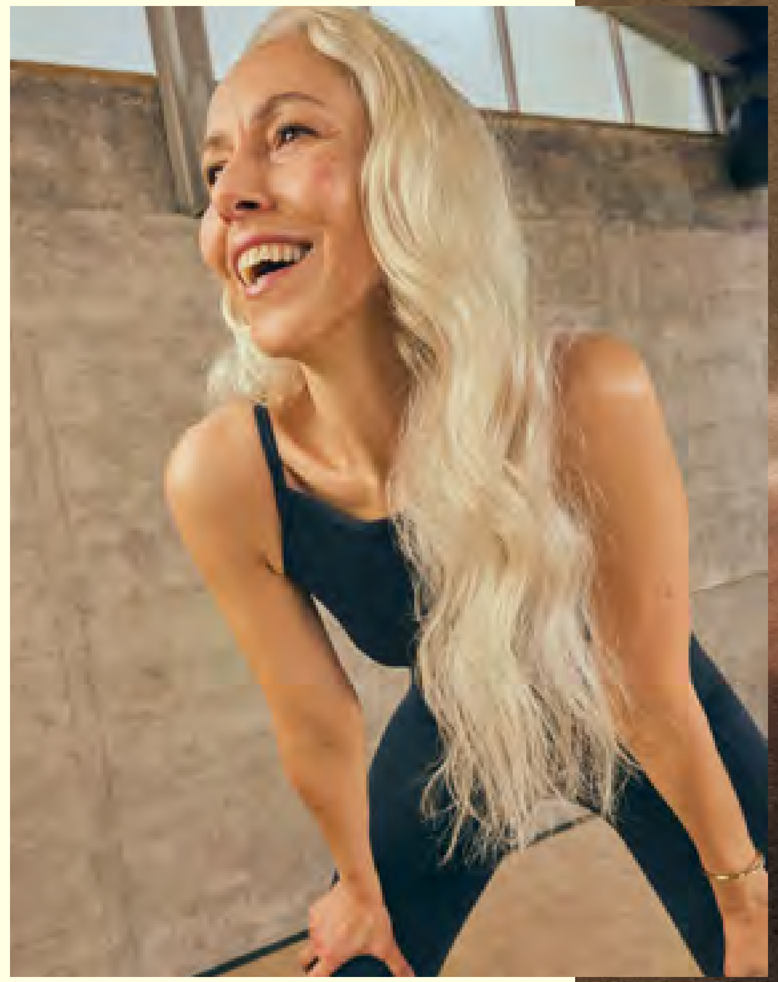
94%

94% of people say the gym is among the most important tools in their wellness toolkit

WELLNESS – A PERSONAL JOURNEY

Sometimes mocked for being abstract, the concept of wellness is inherently hard to define. This is largely due to its subjectivity, with each person having their own individual perspective on what it represents. But one thing that respondents can agree on is it representing a shift in focus – from what the mirror shows, to how the inside feels. And this is having a profound effect on reshaping the fitness landscape.

This isn't just a trend; it's a redefinition of success. For the majority, fitness has evolved from a siloed activity into an essential pillar of a healthy lifestyle, as crucial as sleep or nutrition.

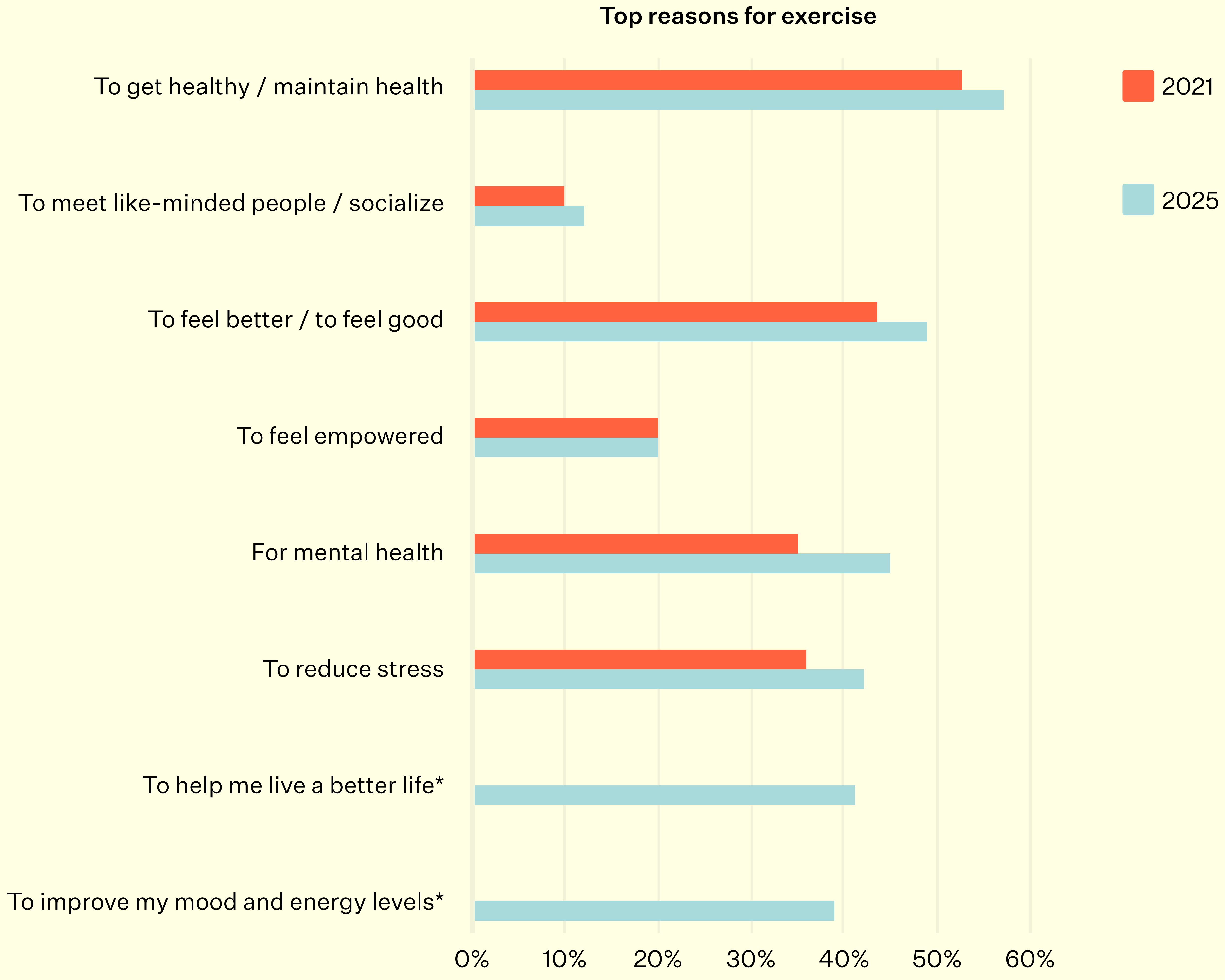


SMALL CHANGES, BIG IMPACT

The driving force behind exercise has undergone a significant evolution, moving beyond traditional appearance-based goals to embrace a more holistic vision of health.

This shift is underscored by the significant number of consumers who prioritise wellness now more than ever, with a clear focus on long-term goals like longevity and enhanced quality of life.

Since 2021, motivations to exercise for mental health have grown by 29%, with drivers such as feeling good, reducing stress, and social connection all gaining traction. This highlights a broader shift from aesthetic goals to a deeper sense of intrinsic satisfaction.

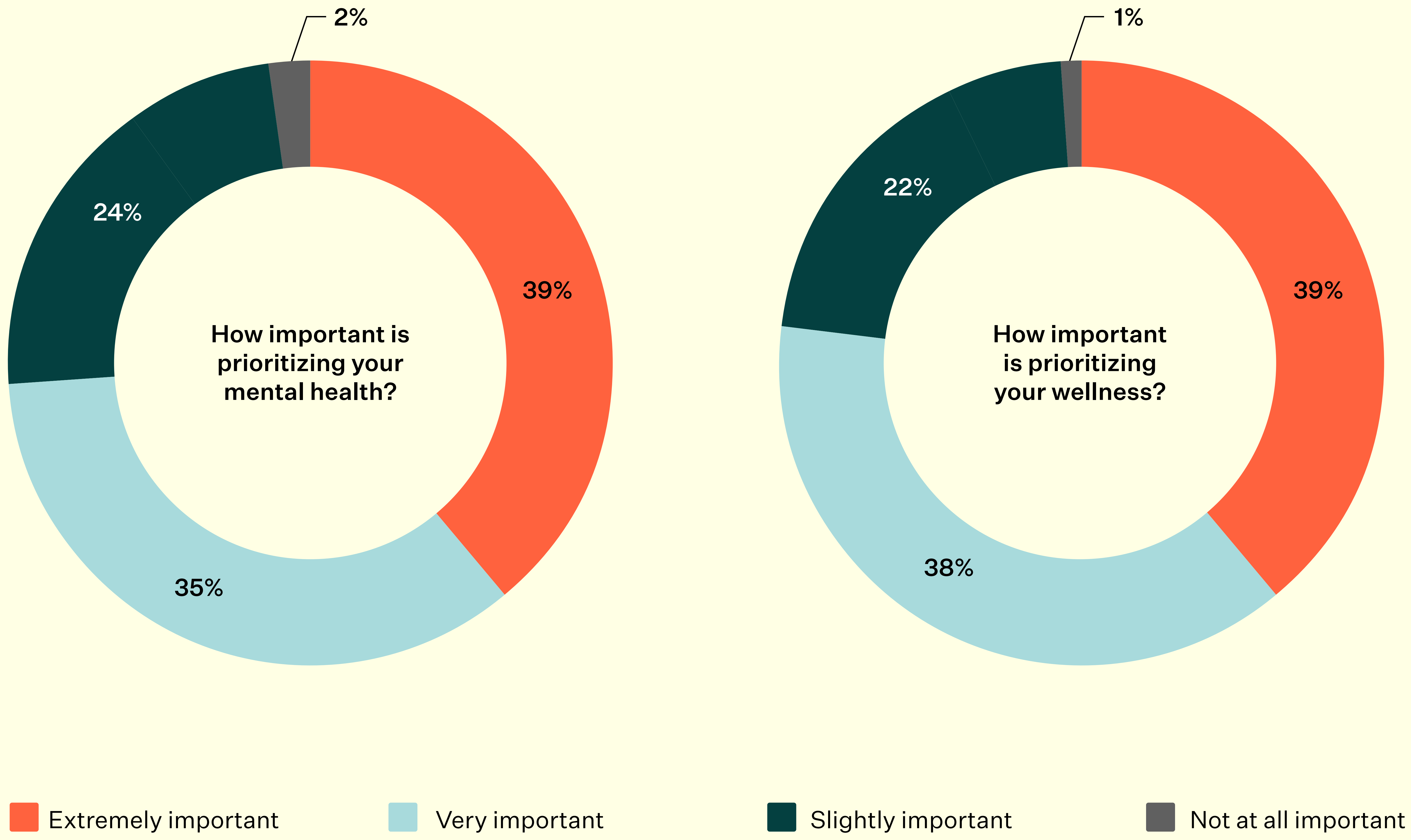


All regular exercisers
** New question for 2025 – not asked previously*

PEACE OF MIND: A NON-NEGOTIABLE

Wellness is no longer a niche interest; it's a key consideration in people's lives. 74% of consumers say prioritizing mental health is very or extremely important to them and 77% of people say the same when it comes to prioritizing their overall wellness.

This awareness translates directly into behavior, with greater consideration given to how actions impact ongoing feelings of satisfaction – specifically supporting mental and physical wellbeing.

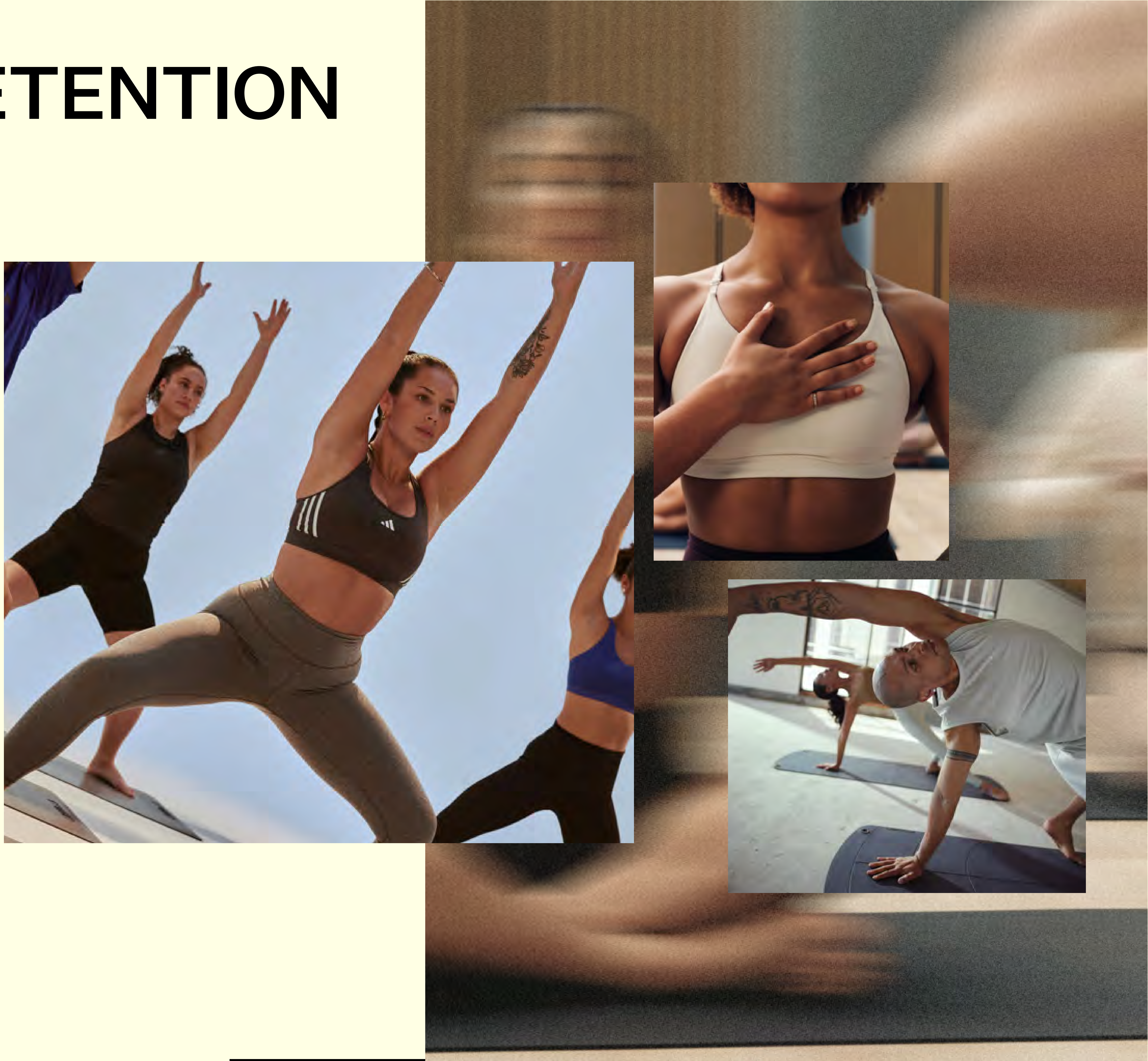


Total addressable market

‘REST DAYS’ DRIVE RETENTION

It may seem counterintuitive for gyms to encourage members not to work out from time to time, but such a stance could hold the key to unlocking even greater growth. Where once clubs were considered just a spoke in consumers’ wider wellness wheel, they’re increasingly being seen as the main component thanks to their ability to support rest and recovery.

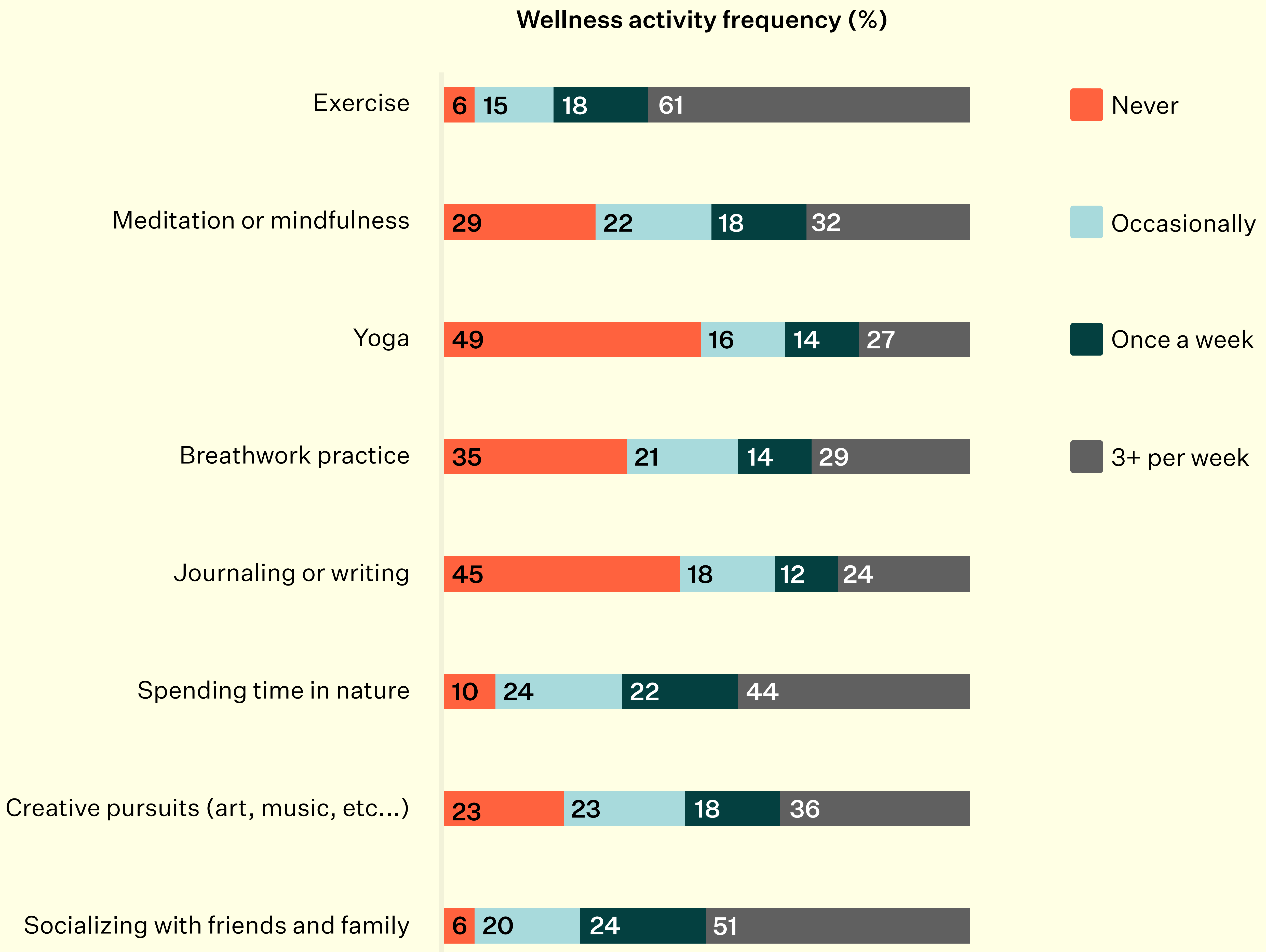
By expanding their Mind/Body offerings (with enhanced yoga timetables, breathwork and meditation sessions) and adding wellness-themed digital content and health service bolt-ons to memberships, gyms around the world are positioning themselves as a one-stop shop for wellness needs.



THE WELLNESS ECOSYSTEM

Far from being a limited selection of activities, wellness incorporates everything from weights to writing. Exercise is the undisputed champion, with nearly 8 out of 10 people training at least once a week specifically for their wellness. Following closely are foundational, accessible practices like socialising and spending time in nature, which form the bedrock of many wellness routines.

Clubs have the perfect opportunity to become a central part of members' lives as trusted, modern wellness hubs. Not only are exercise and socializing the two main drivers for modern members, but yoga, breathwork and meditation activities are all fully serviceable in-club. With wellness now embedded in the modern psyche, the more aspects of it a facility can support, the greater the potential for brand advocacy. After all, when people find a place that meets their holistic wellness needs, they're far more likely to share it with others.

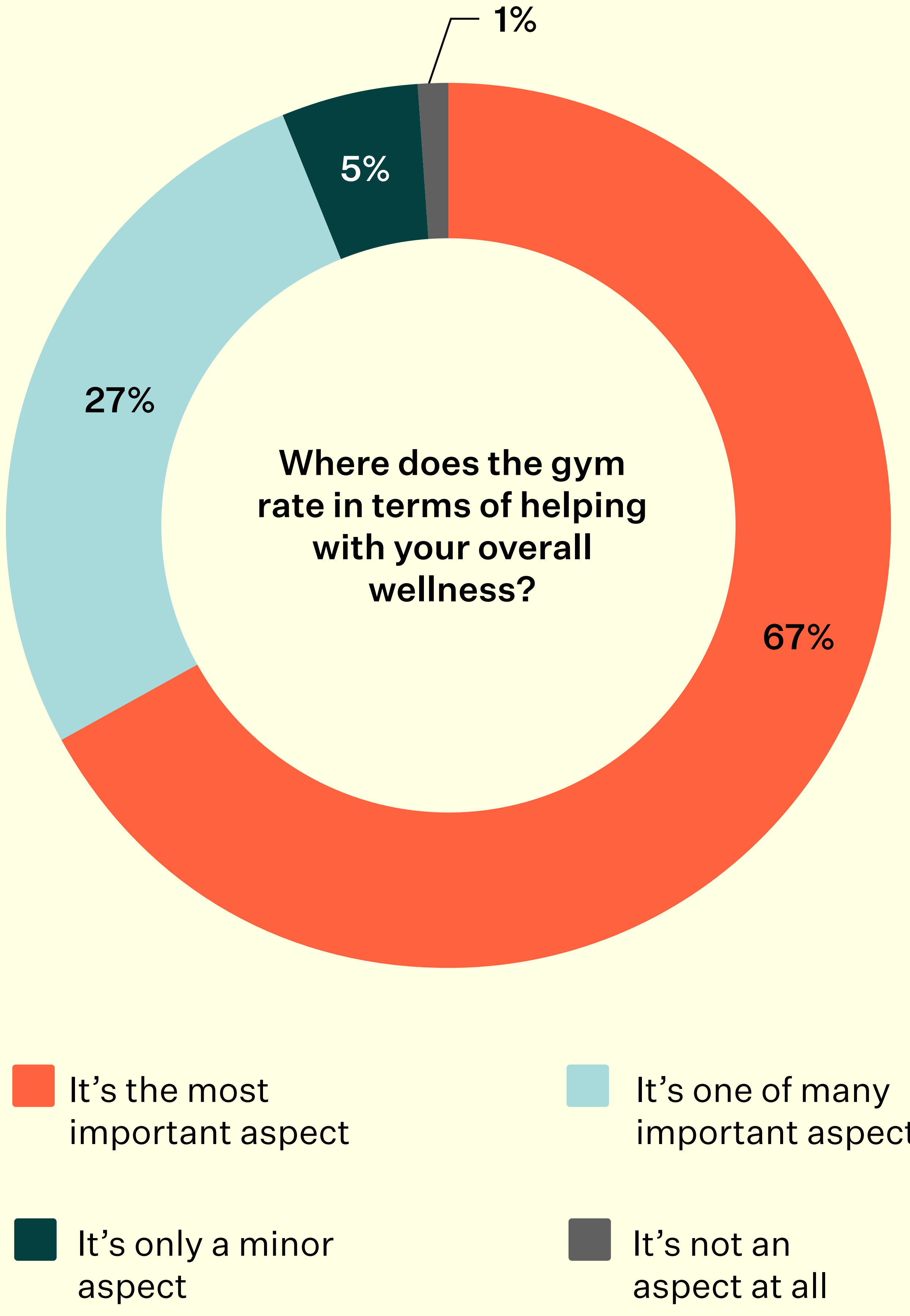


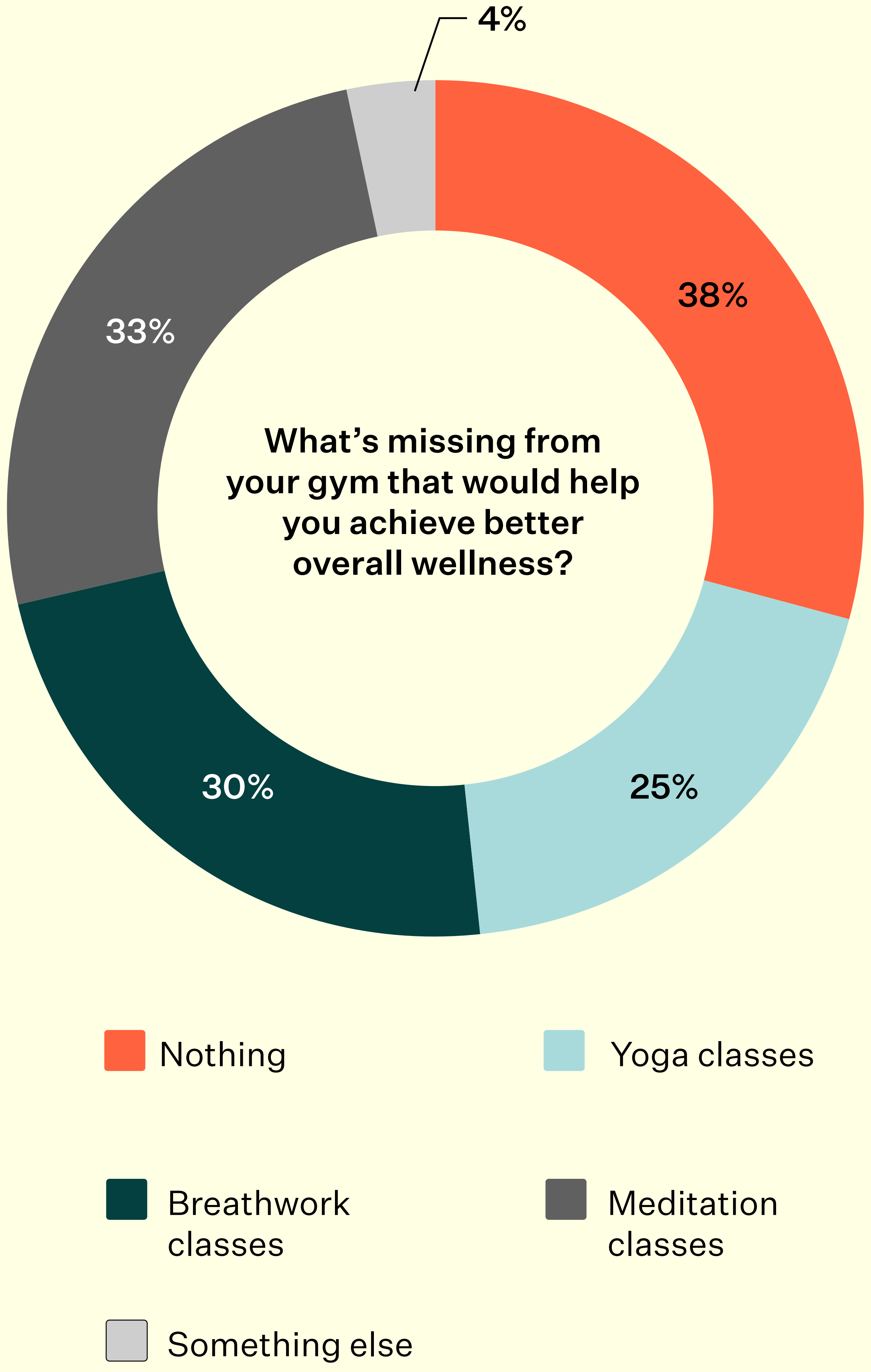
Total addressable market

GYMS: THE FRONTLINE FOR WELLNESS

If there's any doubt as to where fitness facilities sit within the modern wellness hierarchy, the stats are comprehensive: 94% of members say the gym is among the most important tools in their wellness toolkit (67% say it's the most important, while 27% say it's one of many important aspects). And they want more reasons to keep visiting.

Our research shows that while many members are happy with their current offering, a third want meditation classes, 30% are interested in exploring breathwork classes, and a quarter would like to see more yoga at their club.





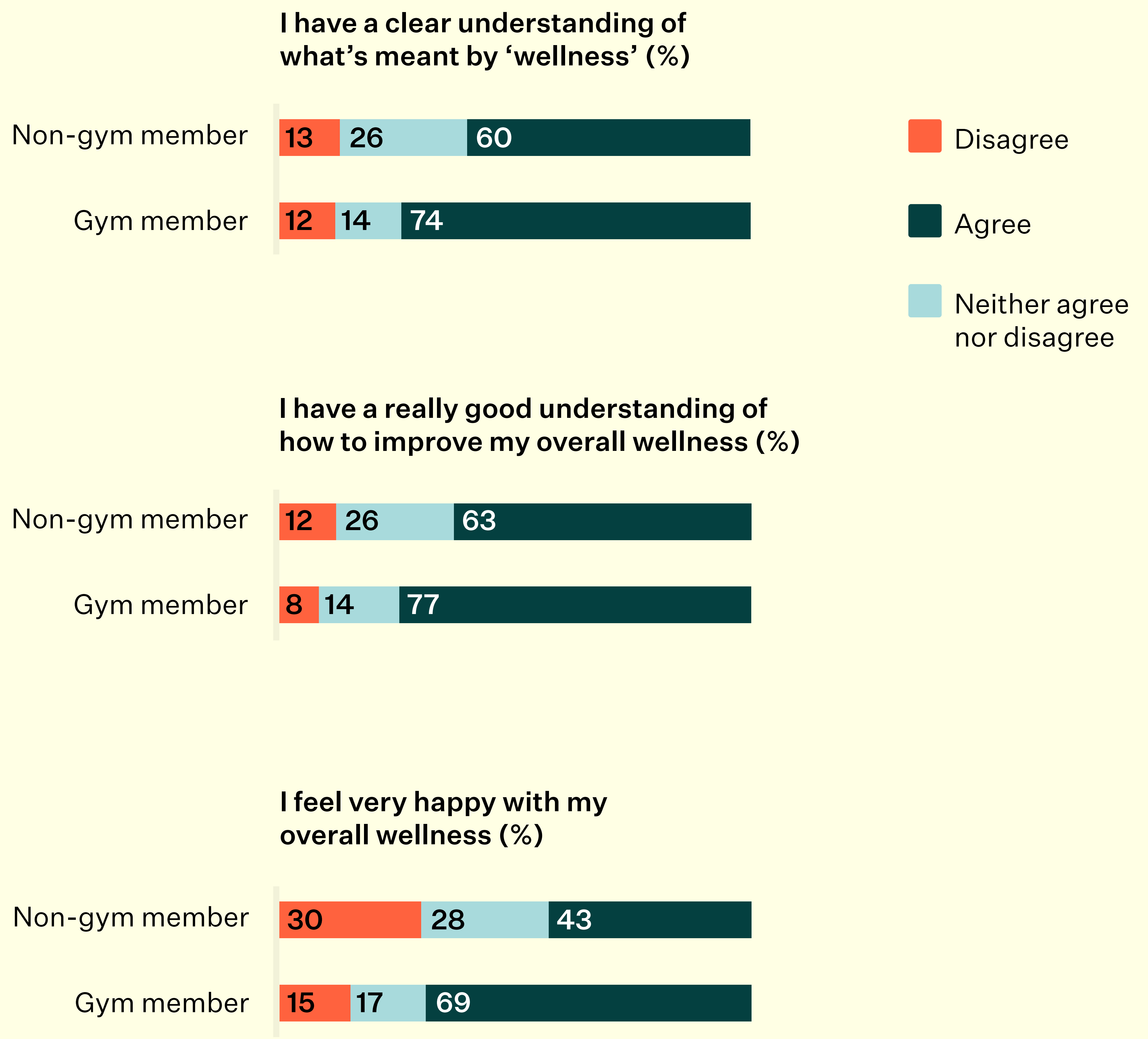
All gym members

WELLNESS WINS FOR GYMS

74% of gym members say they have a clear understanding of what is meant by ‘wellness’, but this drops to 60% among non-members, highlighting the role of gyms in empowering users to understand and define their needs.

Similarly, gym members appear to have developed an intuitive connection to their wellness needs, acquired through experiences that help them pinpoint what works best for them. This enables them to call upon a range of tools, when needed, to improve their wellness. 77% of gym members say they have a strong understanding of ways to improve their wellness, compared to just 63% of non-members.

Crucially, having a self-defined awareness of what wellness means, and how to improve it, is driving happiness. Over two thirds of gym members (69%) feel very happy with their personal wellness, versus 43% of non-members.



“I work from home, which provides flexibility, but I miss the human contact. The gym has been a central part of countering that for me. If I’m not feeling mentally well, I know I can head to my club, work out, and feel better. It’s a place to reset and feel connected with others as part of a shared routine.

Coming to my gym more often is key to helping me assert my space. It’s a confidence boost: I’m here, I’m going to do it – even if it’s not perfect every time.

The vibe at my gym is really important, and key to feeling like I’ve had a successful workout.

Sometimes I’m tired when I get here, but then the music and everyone else working out motivates me. Coming to the gym has helped adjust my mindset. I’m no longer laser-focused on goals. For me it’s about being consistent – and of course fitter. Physically, I feel stronger.

The gym’s helped me understand which environments fuel my recovery. When I’ve had an intense week, because of work or training, I know it’s time to reset and get back to my best. That’s when I’ll take a yoga class and focus on deep relaxation.”

- CLARA, 25

SECTION 5.

GROWTH OPPORTUNITIES

STRIKING THE HUMAN/ TECH BALANCE

Consumers want tech to track outcomes, but humans to lead workouts

10%

PEOPLE POWER
Just 10% of all consumers (and 11% of Gen Z) prefer AI workout guidance over human coaching

78%

SWEAT SAVVY
78% of individuals are using tools and devices to track progress the same or more than 3 years ago

33%

DATA WINS
⅓ of exercisers are using a fitness app for every workout

76%

HOLDING OFF
76% of consumers aren't interested in GLP-1 medications

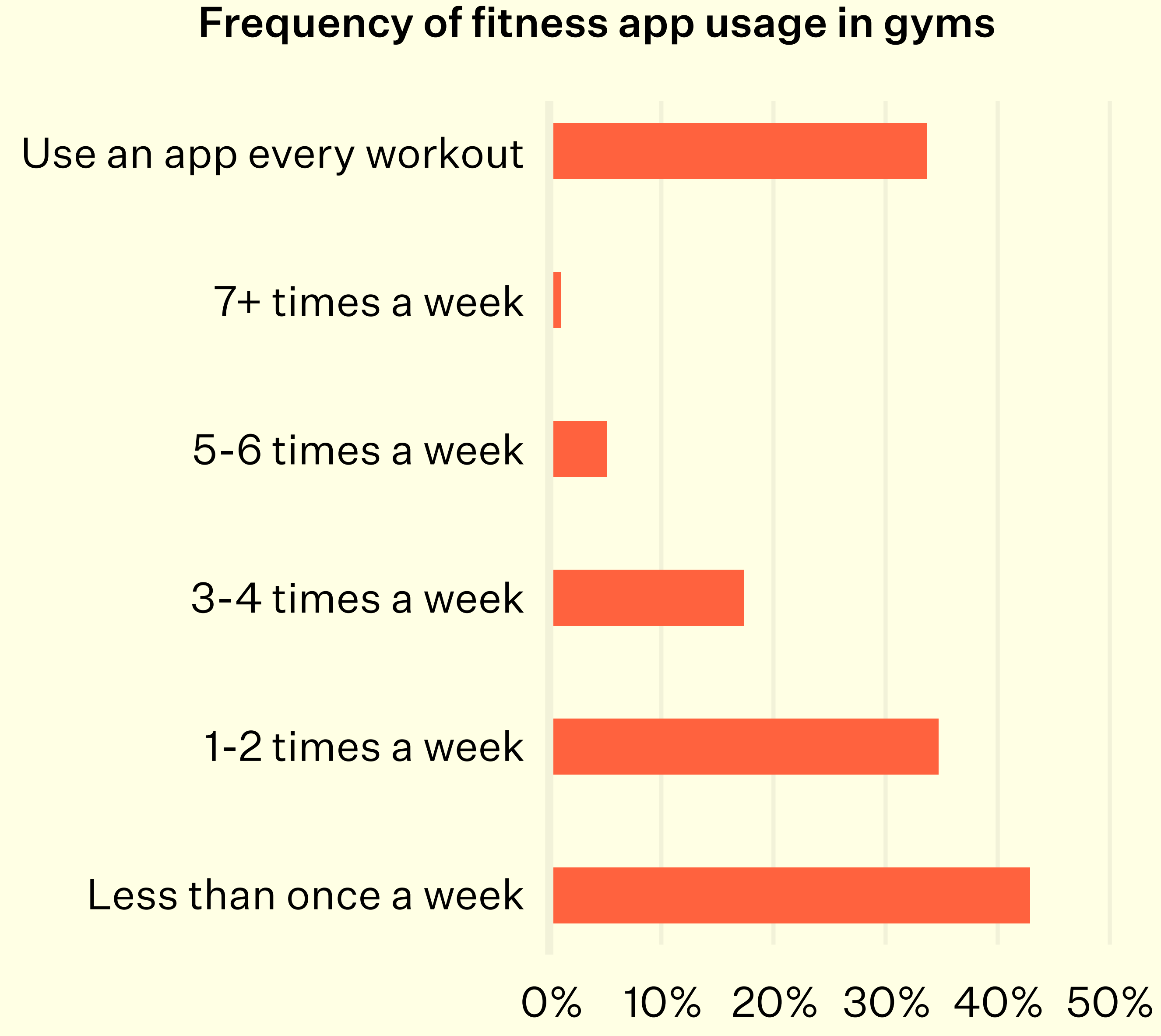
10%

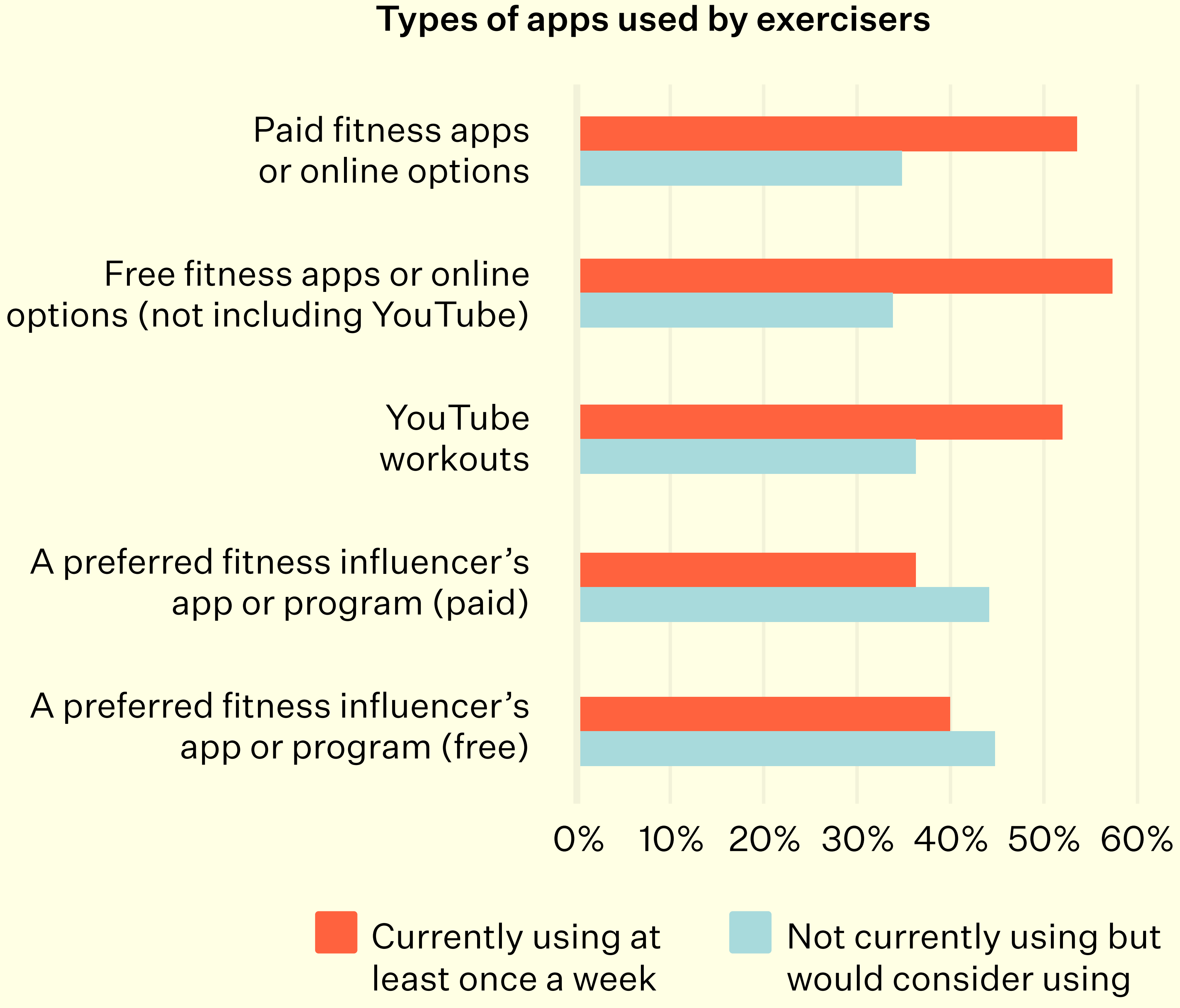
Just 10% of all consumers (and 11% of Gen Z) prefer AI workout guidance over human coaching

THE EVOLUTION OF FITNESS APPS

78% of individuals say they're using tools and devices the same or more than 3 years ago to monitor their progress and track activity, showing a clear trend towards data-driven fitness. But when it comes to fitness apps, there's a notable split between 'constant' and 'casual' users.

A third of exercisers use a fitness app for every workout. For this group, the smartphone is as essential as a dumbbell, used for everything from tracking lifts, to following guided programs and receiving pointers.
But 67% of exercisers are more casual, using apps just twice a week or less. Exercisers are well-versed in the options available to them, with many choosing digital apps to support their workout. But that's not the full story...





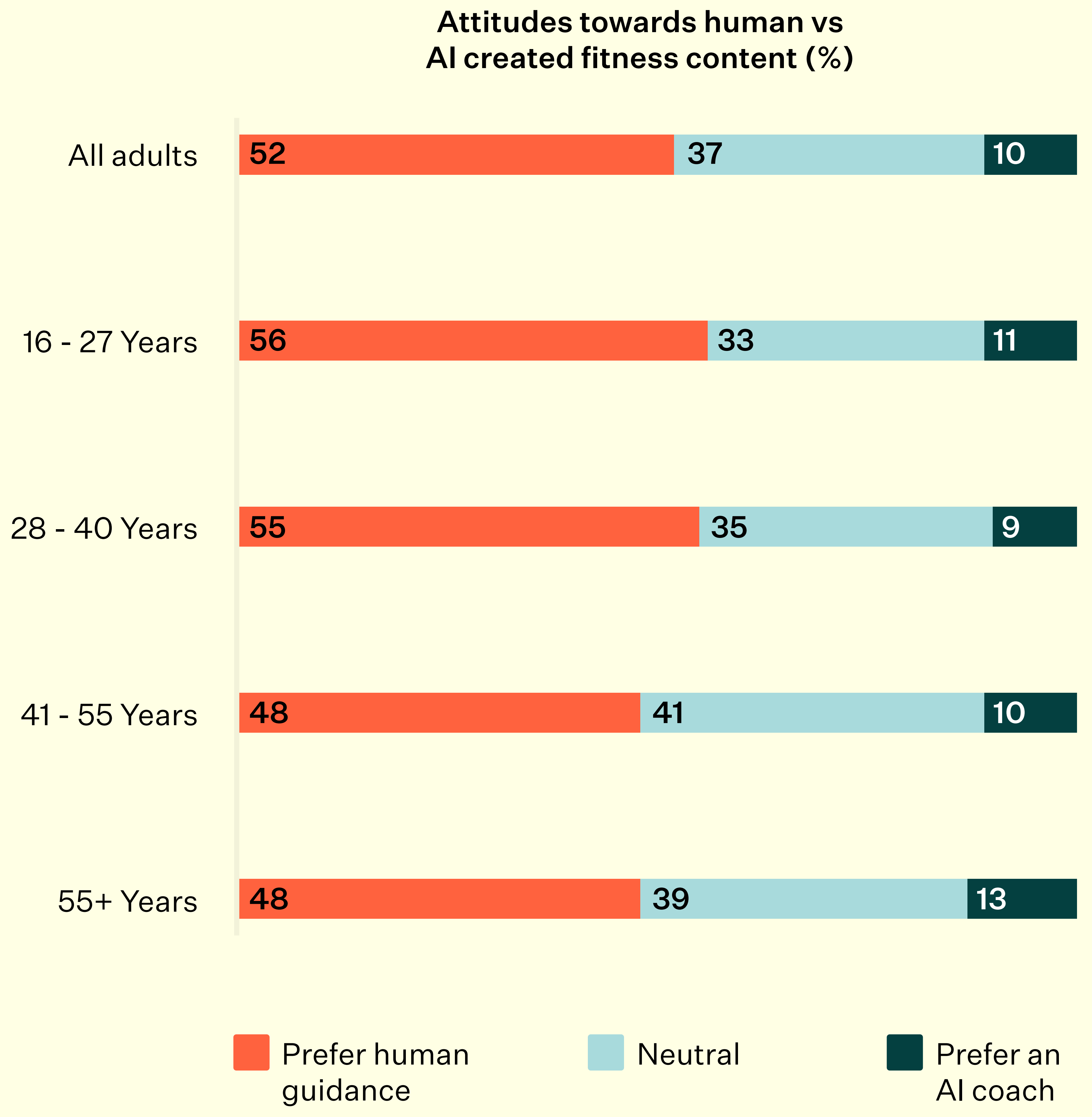
All gym members

THE HUMAN FACTOR

When asked about attitudes towards human or AI-created fitness content, respondents showed a clear preference for human guidance. Only 10% of respondents favoured an AI coach for its convenience and ability to deliver personalised workouts, with 52% either “strongly preferring” (31%) or “leaning toward” (21%) a human trainer, valuing the personal connection and expertise that comes from human interaction.

Despite those under 40 growing up as digital natives and often being branded ‘screen addicts’, the data shows that preference for a human coach is strongest among this group. Just 11% of 16-27 year-olds and 9% of 28-40 year-olds prefer AI-generated content.

Interestingly, the 55+ age group was the most open to AI, with 13% preferring an AI coach – the highest of any demographic. This suggests the appeal of AI in this context may be less about generational tech-savviness and more about individual priorities.



Total addressable market

> “Everyone I know has a smartwatch or a tracking device. When I arrive at the gym, I join the hordes of other members who hit ‘start workout’. I like to track how hard I’m working, but some days I feel like I’m moving to hit my targets, rather than to feel good. It leaves me feeling anxious about my outputs, instead of engaged with what moves the needle on my progress, both physically and mentally.”

- SASHA, 25

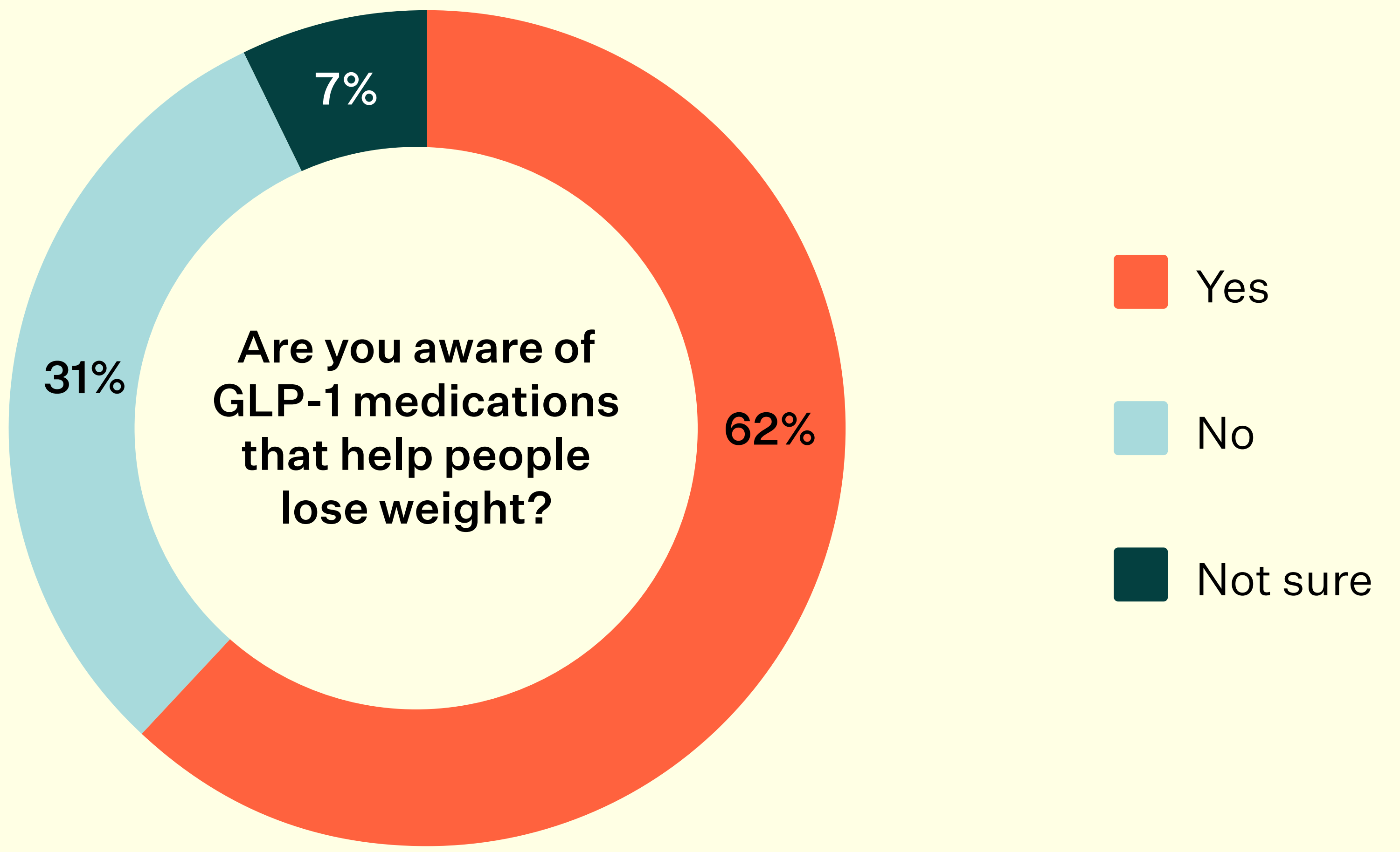
GLP-1: HYPE OR HOPE?

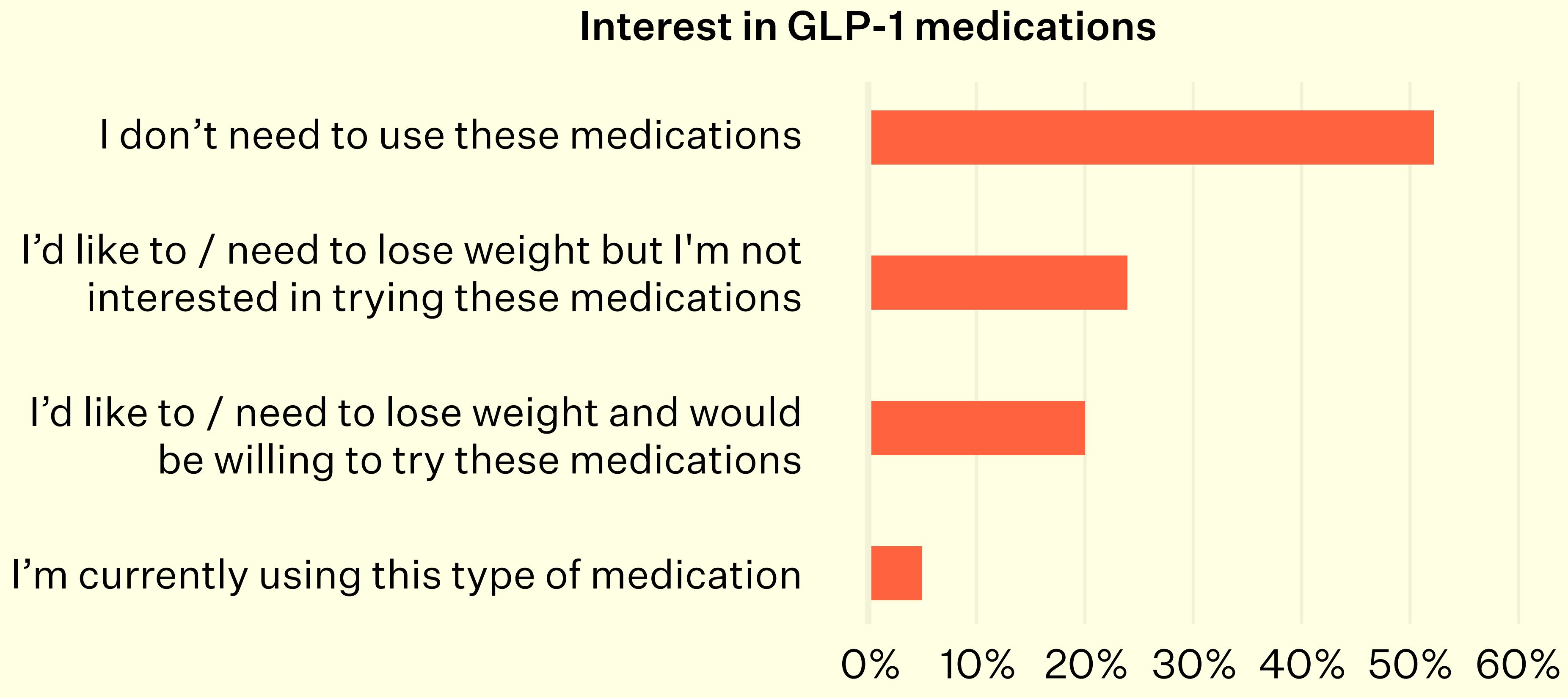
A significant majority of respondents (62%), are aware of the new class of medications available to support weight loss. This high level of recognition indicates these drugs have firmly entered the public consciousness.

Despite this broad awareness, the path to adoption is much narrower. The data reveals a complex picture of need, interest, and hesitation:

- 52% of respondents feel they have no need for these types of medications, representing the largest single group.
- Beyond that, there is a clear divide: 24% of respondents aren't interested in trying GLP-1 medications, while 20% would be open to it.
- Actual use remains low, with only 4% of total respondents reporting that they're currently using this type of medication.

This data paints a compelling picture: while most people have heard of GLP-1s, there is significant hesitation. For every person currently using these drugs, five others are considering them, and six others who want to lose weight are actively avoiding this option.





Total addressable market

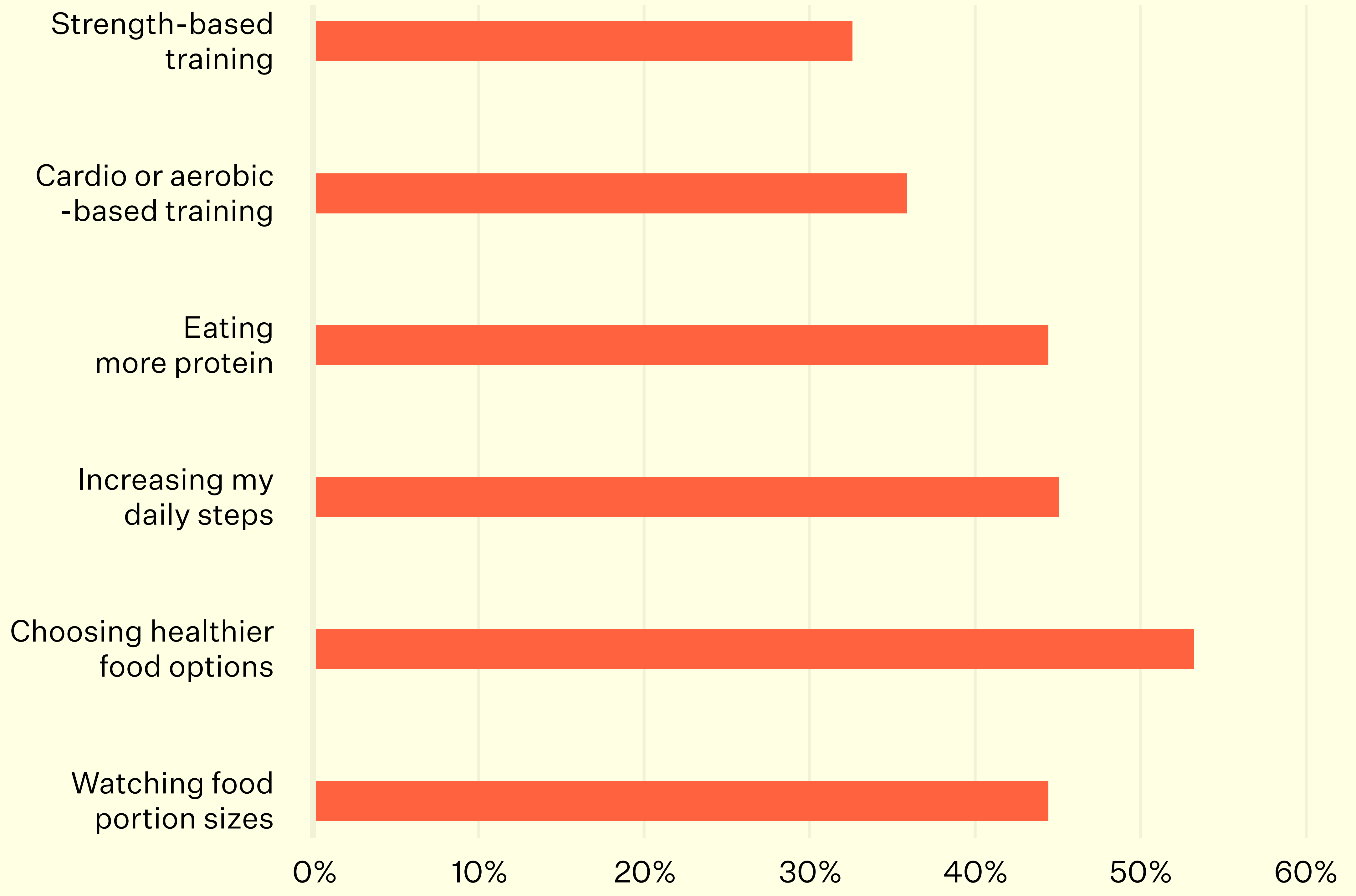
EVOLVING WEIGHT LOSS TACTICS

For those not incorporating GLP-1s into their weight loss plans, there's strong awareness of the other options available to them.

These results demonstrate that individuals are more educated than ever about weight-loss options. As well as traditional tactics such as cardio training (36%) and managing portion sizes (44%), consumers are educating themselves more deeply on other tools to support their goals. One third (33%) appreciate the importance of strength training for supporting weight loss and nearly half (44%) are doing more than just counting calories – incorporating more protein into their meals to boost results.

For clubs, helping consumers hit their weight-loss goals could comprise offering run clubs to hit step counts, or group lifting sessions for those new to strength training. Providing support to ensure their strategies stay on track boosts their motivation, while introducing members to like-minded individuals deepens their connection to each other and your club.

Common tactics for weight loss



Respondents reporting a perceived need for weight loss.

SECTION 6.

METHODOLOGY

METHODOLOGY

METHODOLOGY:

- Quotas were set by country to ensure adequate sample sizes to look at individual markets
- Thresholds were also set by age group and gender to ensure balanced representation. The weighting used was based on official population figures for age and gender
- Fieldwork was conducted 21st June to 3rd July 2025
- A total sample size of n=10442 was achieved with a maximum margin of error of +/- 0.96%
- The average survey length was 11.4 minutes
- In this report, mentions of percentage change indicate how much a value has grown or shrunk compared to previous levels, while tables typically show the absolute percentage point change (i.e. the numeric difference between two percentages.)

APPROACH:

- An online survey, with consumers randomly invited to participate from Qualtrics. Qualtrics is a leading enterprise survey technology solution. It partners with over 30 online panel providers to supply a network of diverse, quality respondents to their worldwide client base.
- Panelists are incentivized for every survey they complete
- PARTICIPATING COUNTRIES:
USA, Brazil, UK, Germany, Norway, Sweden, Finland, Denmark, Saudi Arabia, UAE, China, Japan, Australia.

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