

Women & the Gym:

unmet needs and the role
of women-only spaces







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Foreword

I think it's time to start talking about women and gyms well beyond the context of training modalities, glute builders and life-stage education.

There is a tough truth here: The mainstream gym environment, its membership structures and its equipment, have been designed in a way that silently excludes most women.

Their emotional needs are written out, unconsciously and unintentionally. And as an industry veteran myself, I've been a part of that problem, unconsciously and unintentionally. I'm really sad about that.

But when you understand it, it's something you can't un-see, and that presents choices about what – if anything – to do.

A social scientist in my head, but a leader in my heart, I'm really proud to use our platform in the gym industry to say “we don't get it right all of the time, and we know we can do better, so better is what we're deciding for every day.”

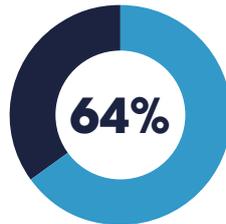
This white paper is part of that responsibility, and it's my great hope that it stimulates a bit of curiosity and – importantly – action.

Introduction

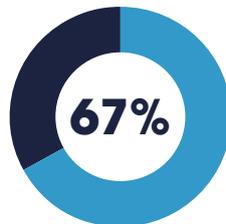
Women and Gyms Today

A participation gap that cannot be ignored

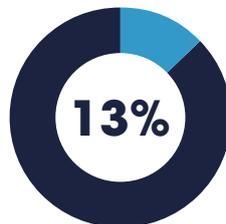
The UK fitness sector has grown steadily in scale, sophistication and visibility over the past two decades. Gyms are more prevalent than ever, there's a wide array of brands, and health and wellbeing have become mainstream cultural priorities. Yet within that growth sits a persistent and often underexamined pattern: women participate differently.



Nationally, **64% of women are not currently members** of a gym or health club.



Membership peaks among women aged **25 to 34, where 67% report being members**, before declining steadily with age.



By 65 and over, only 13% of women remain members. These figures do not describe an exception. They point to a recurring feature of women's participation.

Although male participation also falls with age, women enter mid-life from a lower base and fall below the 30% rate of membership much earlier. At ages 45 to 54, 29% of women are members compared with 38% of men. The difference suggests that life stage pressures have a particularly pronounced effect on women's participation.

It would be simplistic to interpret this as a lack of interest in health. Women are highly engaged in wellbeing more broadly. They are often the primary health decision-makers within households. They consume fitness content, invest in wearable technology and participate in informal exercise in large numbers. The issue is not apathy. The issue is participation in a specific type of space.

Not one experience, but a pattern

It is important to state clearly that women's experiences of gyms are not uniform. Many women feel confident, capable and entirely at ease in traditional gym environments. They lift weights, work out and see gyms as positive and empowering spaces. This paper does not question or diminish those experiences.

However, the data shows consistent patterns suggesting that a significant proportion of women experience gyms differently, particularly at certain life stages. Participation drops sharply beyond early adulthood. Breaks in membership are common. Re-entry is not straightforward. Even among current women members, issues such as overcrowding and dissatisfaction are widely reported.

This is not a claim about every woman. It reflects a recurring experience. When a pattern repeats across age groups and different participation styles, it becomes a question of how spaces and products are designed.

Life stage and the reality of time

The participation gap cannot be separated from wider structural realities. National labour and time-use data consistently shows that women are more likely to carry unpaid care responsibilities, experience time pressure and adjust working patterns around family needs. These factors influence how and when women are able to prioritise themselves.

Alongside these structural pressures, women's physical and mental energy and wellbeing fluctuate across hormonal cycles and different stages of life, making it harder to maintain a consistent exercise routine.

Fitness participation, particularly in structured environments such as gyms, requires more than motivation. It requires discretionary time, physical energy and the mental space to prioritise oneself. For many women, that space can be shaped by a sense of obligation to others and, at times, guilt about taking time for personal wellbeing.

Of course gyms are not responsible for wider societal inequalities, but they do operate within that context. If women's lives are shaped by fluctuating demands and competing priorities, then fitness environments built around consistent attendance do not always match the realities of life. This may help explain the growing appeal of more flexible, pay-as-you-go participation models that allow exercise to fit around changing schedules rather than requiring fixed routines.

The difference between access and alignment

The UK gym market has made significant strides in improving access. Lower price points, flexible contracts and extended opening hours have removed many historical barriers. Yet access alone does not guarantee alignment.

When participation peaks sharply at one life stage and then declines, it raises a question. Is the environment designed in a way that remains relevant as women move through different phases of life? Or is it designed for a narrower period in life, when time, confidence and stability are easier to sustain?

Alignment is not about creating special treatment. It is about recognising that inclusion sometimes requires adjustment. If many women engage with gyms in phases rather than continuously, models built around constant attendance may leave some behind.

A sector moment

The fitness industry is not static. It evolves in response to demand, culture and commercial pressure. In recent years, conversations around safety, representation and inclusion have become more visible. Campaigns have sought to broaden participation and challenge stereotypes. These efforts matter.

At the same time, national data suggests that the underlying participation patterns have not fundamentally shifted. Women continue to enter and leave the gym system at different rates from men. Confidence and comfort remain significant factors in engagement. Re-entry after disruption is often fragile.

This white paper approaches the issue not as a critique of progress, but as a call for further reflection. If gyms are to play a meaningful role in supporting women's long-term health, they must consider not only how women join, but how they return, how their needs change and how they feel within the space itself.

The issue is not whether women can thrive in gyms. Many already do. The question is whether gyms are consistently designed in ways that recognise how women's lives unfold, both across longer life stages and through the shorter, more transient changes that shape everyday routines.

Research and Evidence Base

This white paper draws on a combination of national research, member data and qualitative engagement. The analysis is grounded in three primary evidence sources.

National population research

Total Fitness commissioned a **nationally representative survey of 5,091 UK adults in 2025**.

The study examined:

- Gym membership status and history
- Frequency of participation in sport and physical activity
- Motivations for joining
- Reasons for lapsing or not joining
- Perceptions of the UK gym industry
- Attitudes towards comfort, safety and staff presence

The sample allows for detailed demographic segmentation, including age and gender analysis. All percentage figures cited in this paper relating to national participation patterns are drawn from this dataset.

This research provides the broader context in which women's participation is understood, including evidence of episodic membership and fluctuating engagement.

The Women's Gym member survey

In 2025, a survey was conducted among **91 members across two existing The Women's Gym locations** (a women-only facility operated by Total Fitness).

This study explored:

- Previous gym history
- Time elapsed since last membership
- Frequency of physical activity before and after joining
- Primary motivations for choosing a women-only space
- Perceptions of comfort, safety and community
- Likelihood to recommend

The results allow for comparison between stated motivations and observable behavioural change.

Where this paper cites figures relating specifically to The Women's Gym, they are drawn from this member survey.

Qualitative interviews and consultation

The development of The Women's Gym followed **structured consultation with more than 150 women**, alongside wider engagement across the Total Fitness membership base and general population research.

Interviews explored:

- Experiences of mixed gym environments
- Barriers to participation
- Life-stage transitions
- Confidence and self-consciousness
- Desired features within a fitness environment

This qualitative insight informed both the design of The Women's Gym and the framing of this white paper.

Other Sources

Broader contextual references draw on publicly available UK labour market and time-use data, including Office for National Statistics reporting on unpaid care and working patterns.



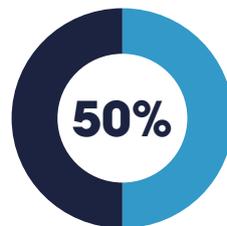
Section 1

Gym Membership Is Not a Straight Line for Many Women

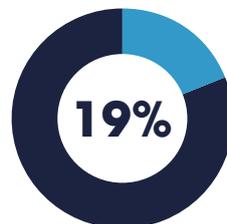
The expectation of steady attendance

Gym membership is often framed as a marker of consistency. The industry speaks in terms of journeys, progress, habit formation and long-term transformation. Marketing narratives celebrate discipline and continuity. Membership models are built around monthly renewal and annual retention.

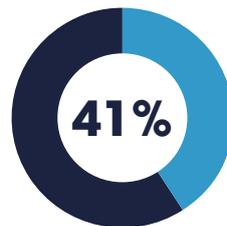
For many women, however, engagement with gyms does not follow this uninterrupted path.



Among women who are not currently gym members, **50% have previously held a membership**. Non-membership, therefore, does not necessarily signal inexperience or disinterest. In many cases, it reflects a pause rather than an absence of engagement.



Even among women who are current members, long-term continuity is rare. **Only 19% of current women gym members report having had no breaks in their gym membership** over the past ten years. For the majority, membership has been interrupted at least once. For a significant minority, it has been interrupted repeatedly.

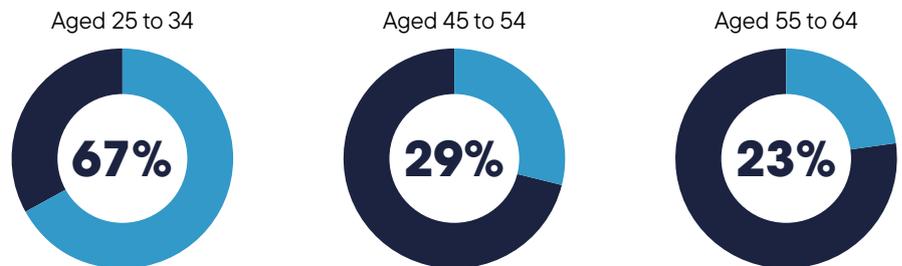


41% of women non-gym members report having taken multiple breaks from gym membership over the past decade, **compared to 34% of men**. Participation, for many women, is cyclical rather than linear.

Participation levels shaped by circumstance

Breaks in participation are rarely triggered by a single dramatic event. More often, they follow changes in health, routine or circumstance. For example, **20% of current women gym members report having taken a break due to illness or injury**, and the figure is **similar among non-members at 22%**. Interruption is not unusual.

These figures point to a simple reality. Breaks are common. They are not anomalies. They form part of many women's fitness histories.



When membership **peaks at 67% among women aged 25 to 34 and then falls to 29% by ages 45 to 54 and 23% by 55 to 64**, it is unlikely to be driven by reduced interest in health alone. The pattern suggests competing demands on time and energy, alongside changes in confidence, identity and physical capacity.

Each pause has consequences. Fitness levels shift. Confidence can dip. The gym environment may feel less familiar on return. What once felt routine can feel uncomfortable.

Returning is not resuming

There is an assumption embedded within many gym models that returning members simply pick up where they left off. In practice, return often feels more complex.

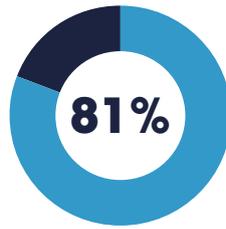
When women re-join after a break, they may do so at a different life stage, with changes in physical capacity and different priorities. A woman returning after pregnancy, illness, menopause or prolonged inactivity is not returning to the same starting point. Nor is she necessarily returning to the same psychological relationship with exercise.

Re-joining may involve relearning equipment, rebuilding strength and recalibrating expectations. It may also involve managing self-consciousness about perceived regression or even simply fitting in and earning the 'right to belong'. What once felt familiar can feel new. What once felt achievable can feel distant.

If gyms are designed primarily around forward progression rather than re-entry, then this moment of return becomes particularly sensitive.

Designing for continuity or designing for reality

As participation for many women is episodic, the question becomes whether gym environments recognise and support that reality.



With **81% of current women members reporting breaks in membership over the last ten years**, continuity appears to be the exception rather than the norm. Yet many gym models continue to assume it as the baseline.

Designing for reality means acknowledging that attendance may fluctuate. It means recognising that returning members may not feel like experienced members and may have entirely different needs. It means recognising that confidence is not always present at the point of joining. In many cases, confidence and comfort only develop through participation.

When gyms are designed around steady, continuous attendance and progression, they may fail to account for the moments when participation feels most vulnerable, particularly when a woman is weighing up whether to return.

If those moments are not designed for, participation will continue to ebb and flow and some women will choose never to return.



Section 2

Leaving the Gym Is Often a Response to Events, Not a Lack of Motivation

Life gets in the way

If gym participation for many women is cyclical, the next question is why those cycles occur.



The data suggests that leaving the gym is rarely the result of a single decisive moment. More often, it reflects a gradual accumulation of pressures. Illness and injury play a significant role. **20% of current women gym members report having taken a break due to illness or injury**, and the figure rises slightly to 22% among women non-gym members. These are not marginal numbers. They represent a substantial proportion of women whose participation has been directly affected by health.



Looking at the ages where membership declines, **family and work pressures can also be cited as major causes**. Participation begins to significantly decline in women's 30s and then dramatically away in their 40s. A time when, for many, work and family pressures become most intense.



The barriers cited by women who aren't engaging with gyms reads as a description of **the mid-life squeeze** – they lack spare cash, free time, a willing friend or partner, access to transport, feeling more energised and motivated.



Wider disruption also shapes engagement. **The pandemic demonstrated how quickly routine can be interrupted** and how fragile consistency can be. For many women, changes to working patterns, caring responsibilities and daily structure extended well beyond lockdown itself. Emerging research* also suggests that the health effects of Covid, including long Covid and disruption to hormonal and menstrual health, may have had longer-term impacts on women's energy levels, wellbeing and capacity for exercise.

When breaks are common and often driven by health or circumstance, stepping away is not necessarily a sign of disengagement. It may simply reflect changing realities.

The compounding effect of multiple breaks

Single interruptions are one thing. Repeated interruptions are another.

As noted earlier, **a significant proportion of women report having taken multiple breaks over the past decade (41% or current non-gym members)**. Interruption is not unusual. It forms part of many women's fitness journeys.

Each pause alters the starting point for the next return. Fitness levels may be lower. Confidence may not feel the same. Habits need rebuilding. What once felt manageable can feel further away.

This is not only about physical conditioning. **Time away can change how capable someone feels when they step back into the space.**

For some women, the decision not to return is not an active rejection of gyms. It reflects a sense that the effort required to re-enter outweighs the reward.

The uncomfortable question for the sector

This is where the conversation can feel challenging.

Gym models are built around continuity, progression and visible improvement. They are commercial environments that rely on retention and renewal. There is nothing inherently problematic about that. However, when participation data shows that continuity is the exception rather than the norm for many women, it raises questions about whether the environment truly aligns with women's needs.

Are gym environments designed to support interruption and return, or are they built around steady, continuous attendance?

Acknowledging these challenges is not about assigning blame. It is about understanding how participation works in practice. The fitness sector has invested heavily in improving access and lowering financial barriers. Yet access alone does not guarantee that re-entry feels manageable.

Time away affects confidence

Physical change during a break is often accompanied by a shift in confidence. A woman who previously felt strong and capable may return feeling less fit or less assured. Mirrors that once marked progress may now highlight how much rebuilding feels necessary. Equipment that once felt familiar may now feel intimidating.

Even among current women gym members, 39% agree that their gym is often overcrowded – meaning either simply too many people or that the equipment layout doesn't allow for sufficient personal space. In a crowded environment, self-consciousness can be amplified. After illness or a significant life change, that heightened awareness can make the environment feel more challenging.

If confidence must be present before participation begins, re-entry becomes harder. If participation itself helps rebuild confidence, then the environment must support that fragile early stage.

Life stage and shifting priorities

The decline in membership after early adulthood is not random. As shown earlier, participation peaks in the late twenties before falling steadily in later decades, suggesting that life stage plays a significant role.

As responsibilities shift, time becomes less discretionary. For some women, carving out time for the gym can feel indulgent or selfish, particularly when care responsibilities intensify. The emotional negotiation involved in prioritising oneself should not be underestimated.

In this context, leaving the gym may not feel like a choice between health and indifference. It may feel like a trade-off between competing obligations.

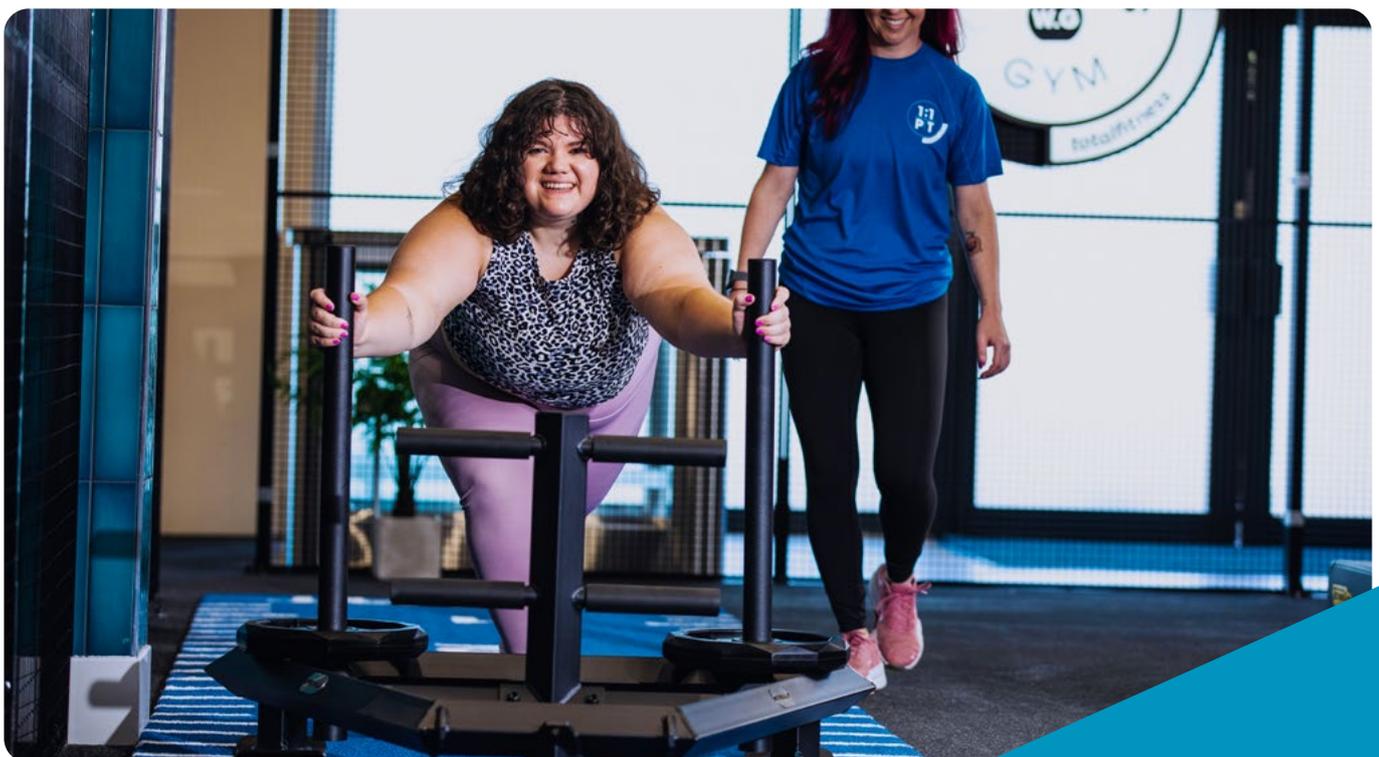
What dropout reveals about design

Given how widespread repeated breaks are, the term “dropout” oversimplifies what is happening. The pattern reflects something structural rather than personal failure.

Instead, the focus shifts to design.

If interruption is common, how are gyms making it easier to return? If confidence changes over time, how are environments supporting women who feel less certain? If life stage shapes participation, how adaptable are spaces to those shifts?

Leaving the gym, for many women, is not a definitive end. It is a pause. Whether that pause becomes permanent may depend less on motivation and more on how manageable return feels.

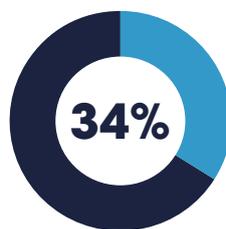


Section 3

Most Women Outside Gyms Are Not Opposed to Joining

The difference between absence and rejection

It is easy to assume that women who are not currently gym members have made a conscious decision that gyms are not for them. The data suggests something more nuanced.



Only 34% of women non-gym members say they have no interest in joining a gym. That means two thirds are at least open to the idea. For many, non-membership does not indicate lack of interest. It reflects barriers that have not yet been resolved.

Cost matters, but it is not the whole story

Financial barriers remain significant. 42% of women non-gym members say money would need to be different for them to join. In a cost-sensitive environment, that figure cannot be dismissed. However, “money being different” does not necessarily refer to price alone. It can also reflect questions of value and priority: whether the cost feels justified within the context of competing demands on time, energy and household spending.

However, cost does not stand alone.

When asked what would need to change before they joined, women also cite factors linked to readiness and confidence.



17%

say they would need to overcome injury or illness



12%

say they would need to feel better before joining



9%

say they would need a gym environment with other users who feel like people like them

Individually, these percentages may appear modest. Collectively, they represent a substantial emotional and situational barrier. Taken together, factors relating to comfort, health and confidence approach the scale of cost as a reason for non-participation.

This suggests that while pricing strategy matters, cost alone is unlikely to resolve participation gaps.

Readiness is not purely practical

Some barriers are logistical. Time, transport and childcare affect feasibility. Others are psychological or biological, reflecting fluctuations in energy, health and wellbeing that can shape when exercise feels manageable.

The statement “I need to feel better” is revealing. It implies that joining a gym is perceived as something one does when already in a certain state of readiness, rather than as a mechanism for creating that readiness. This shifts the role of the gym from a place that builds confidence to a place that requires it.

If women feel they must first regain confidence, energy or physical condition before entering the gym environment, then the threshold for entry becomes higher than intended.

The fact that 9% cite a lack of “people like me” as a barrier also raises issues of belonging. This connects closely to the earlier finding that some women feel they need to “feel better” before joining, which often reflects how they feel about themselves within the gym environment. Representation is not only about marketing imagery. It is reflected in the everyday feel of a space. Who is present? Who seems at ease? Who looks confident?

When women do not see themselves reflected in the space, hesitation increases.

A significant untapped audience

The fact that only one third of women non-members report no interest in joining reframes the scale of opportunity. The majority are not closed off. They are weighing it up.

That evaluation is rarely dramatic. It may take the form of a quiet calculation: whether the environment will feel manageable, whether time can be carved out without guilt, whether returning after a break will feel uncomfortable or supported.

If coming back feels daunting, interest may never turn into action.

The data suggests that participation is less about unwillingness and more about whether the environment feels right. When cost and comfort are cited at similar levels, it challenges the idea that price alone explains engagement.

From interest to action

There is a gap between interest and action. Bridging that gap requires understanding not only why women value fitness, but what makes a gym feel manageable in practice.

If two thirds of women non-members are open to joining, the issue is not demand. It is whether the current model makes it straightforward to act on that interest.

Designing for participation is not only about attracting new members. It is about making the first step feel possible.

Section 4

Even Committed Members Experience Challenges

Membership does not automatically equal comfort

It would be easy to assume that once women join a gym, the most significant barriers have been overcome. Membership can be interpreted as evidence of confidence, alignment and satisfaction.

The data suggests something more complex.



A significant proportion of current women members report that their gym is often overcrowded (39%). Overcrowding is not a minor inconvenience. It shapes how space is experienced. It affects privacy, visibility and how easily equipment can be used. For women who already feel uncertain, crowded environments can make that uncertainty more pronounced.

Not all women experience overcrowding as intimidating. However, a substantial proportion experience their environment as constrained rather than spacious.

Safety and reassurance as central, not peripheral

The importance women place on staff presence offers further insight.



50% of current women gym members rate staff presence on the gym floor for safety and comfort as very or extremely important.



62% rate cleanliness around the gym as very or extremely important.



39% rate staff presence for setting atmosphere as very or extremely important

These figures suggest that reassurance, visibility and atmosphere are not secondary considerations. They are central to how the space is evaluated.

It is notable that the importance placed on staff presence for safety and comfort is higher than that placed on staff presence for fitness advice, which stands at 35% rating it very or extremely important. This distinction matters. It implies that emotional and environmental support may be as significant as technical instruction.

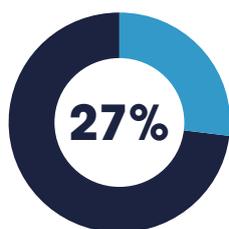
If the primary value of staff is reassurance rather than coaching, then the tone and design of the space take on greater importance.

Identity shift within membership

Even for women who remain members, identity is not static.

Participation often fluctuates. A woman who joins at 28 may experience the gym differently at 38 or 48. **Life stage changes priorities.** Physical capacity evolves. Confidence moves in cycles. These shifts occur not only across decades but also within shorter rhythms of life, including hormonal cycles that can affect energy, recovery and motivation. When membership models assume stability, they risk overlooking this internal evolution. The woman who once trained intensively may later attend less frequently. The woman who once prioritised performance may later prioritise wellbeing.

When commercial focus shapes perception



There is also evidence of ambivalence in how women perceive the priorities of their gyms. **27% of current women gym members agree that their gym is more interested in making money than promoting fitness and health.**

This does not imply dissatisfaction in itself. Gyms are commercial organisations, and members understand that. However, perceptions matter. When a significant minority view profit as the dominant motive, other aspects of the experience may be interpreted through that lens.

Overcrowding, for example, may be seen not simply as a capacity issue, but as evidence of prioritising money over member experience. Reduced staff visibility may be read as cost control rather than operational choice. In that context, messages about care, support and wellbeing risk feeling less convincing.

The issue is not whether gyms should operate commercially. It is whether commercial imperatives are balanced with visible signals of investment in member experience.

From tolerance to belonging

There is a difference between tolerating a space and feeling at ease within it.

Women may attend regularly, achieve results and still experience moments of discomfort. Overcrowding may be accepted as part of the experience. Commercial messaging may be ignored. Staff presence may vary.

The question is not whether women can function within these conditions. Many clearly do. The question is whether these conditions make participation easier to sustain, particularly for those whose confidence is less stable or whose attendance is more intermittent.

When a space feels straightforward and supportive, returning becomes easier. When each visit requires effort to settle in, continuation demands greater resilience.

Friction, even at modest levels, shapes long-term behaviour.

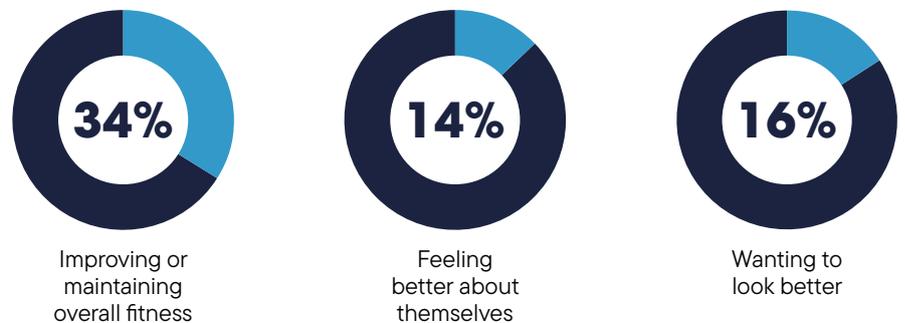
Section 5

What Women Say They Want From Gym Membership

Health and longevity over image

Discussions about women and fitness are often dominated by appearance. Cultural narratives continue to frame exercise in terms of weight loss, aesthetics and transformation. Marketing imagery across the industry has historically reinforced this association.

The data presents a more grounded picture.



Among current women gym members, **34% identify improving or maintaining overall fitness as their top reason for membership. A further 14% prioritise feeling better about themselves.** By contrast, **16% place wanting to look better as their primary motivation.**

These figures suggest that while appearance is not irrelevant, it is not dominant. The primary drivers are health, functionality and emotional wellbeing. Women are investing in fitness not simply to alter how they look, but to maintain capacity, energy and long-term health.

This distinction matters. If the majority of women are motivated by sustainability rather than transformation, then environments that overemphasise performance or image may feel misaligned.

Making space for fitness

Another notable theme within motivations is the **desire to “spend time on myself” or to invest in personal wellbeing.**

For women whose lives often involve balancing work, family and care responsibilities, gym membership can represent protected time.

However, as discussed earlier, prioritising that time is not always straightforward. The same cultural expectations that limit participation can also shape how women interpret their own motivations. Wanting to feel better or to maintain health may be more socially acceptable ways of expressing a desire for personal space.

This does not undermine the authenticity of these motivations. It highlights that prioritising fitness often requires balancing competing responsibilities.

When women describe joining in order to “feel better”, the phrase encompasses physical, emotional and psychological dimensions.

This may also help explain the enduring appeal of structured group exercise for many women. A time-boxed class can create a clear boundary around personal time, making it harder to shorten or abandon when competing demands arise. **The structured nature of classes can also provide mental focus, reducing the need to plan or self-direct a workout** and allowing participants to follow instruction rather than negotiate their own motivation in the moment.

Performance as one motivation among many

The industry has seen growth in performance-led trends, including strength training, endurance events and structured programmes. For some women, these are compelling and empowering. Performance-based goals remain important for a segment of the market.

However, they do not represent the majority.

Only a small proportion of women members identify working towards a specific event or sport as their primary reason for membership. Similarly, very few prioritise lifestyle identity, the image associated with membership or meeting new people as their top driver.

This suggests that for many women, the gym is not primarily a social status marker or competitive arena. It is a functional environment supporting personal health.

If gym design and messaging skew too heavily towards intensity or identity, they may resonate strongly with a core group while feeling peripheral to others.

The gap between motivation and environment

When motivations centre on maintaining health and feeling better, the environment becomes particularly significant.

A woman joining to sustain long-term wellbeing is not necessarily seeking high-intensity competition. She may be seeking consistency, reassurance and accessibility. **She may be seeking an environment where attendance feels manageable rather than pressured.**

If most women join to maintain their health, environments that heighten comparison can make attendance unnecessarily difficult.

The reason for joining and the experience inside the gym need to align. When women join for their health but feel uncomfortable in the space, the experience works against the motivation.

Redefining progress

Traditional gym narratives often frame progress in visible, measurable terms: weight lifted, distance run, body composition changed.

These metrics are valuable. They provide clarity and structure.

However, they often assume that improvement follows a steady and predictable trajectory. For many women this is not always the case. Hormonal cycles can influence energy levels, strength and recovery across the month, meaning that performance may fluctuate even when commitment and effort remain consistent.

Also, if 34% of women are primarily motivated by maintaining overall fitness and 14% by feeling better, progress may be defined less by visible transformation and more by sustained capacity and wellbeing.

Recognising this does not diminish ambition. It broadens the definition of success.

If gyms are to support sustained women participation, they may need to ensure that environments validate these quieter forms of progress as visibly as they celebrate performance milestones.



Section 6

Safety, Comfort and Atmosphere Shape Experience

Environment shapes participation

Across the data, one theme recurs consistently: **women are highly attentive to how the gym environment feels.**

When **half of current women members rate staff presence for safety and comfort as very or extremely important (50%)**, it signals that participation is shaped by more than access to equipment.

Cleanliness, visible staff presence and overall atmosphere rank highly in how women evaluate their experience. These are not secondary considerations. They sit at the heart of whether women continue.

This shifts the conversation away from motivation alone and towards environment.

Beyond policy to lived experience

In recent years, much of the industry's response to concerns about safety and inclusion has **focused on policy, communication and codes of conduct.** Clear ways to report issues, inclusive campaigns and visible commitments to standards all play an important role. They establish expectations.

However, lived experience is shaped less by policy documents and more by what happens on the gym floor.

Design decisions influence whether a space feels manageable or intimidating. Sightlines across the room, the positioning of mirrors, the proximity of equipment, the separation or blending of training zones, lighting levels and acoustics all contribute to perception. So does staffing visibility: who is present, where they are positioned and how accessible they appear.

These factors combine to create what can be described as **'emotional infrastructure'**. They determine whether someone entering the space feels reassured or exposed.

Visibility and density

Gym spaces are inherently visible environments. Effort is public. Bodies are in motion. For confident members, this visibility may feel energising. For others, particularly those returning after interruption or navigating a shift in identity, it can heighten self-awareness.

As noted earlier, a significant proportion of women members describe their gym as often overcrowded. **Density affects more than waiting times. It changes how comfortable someone feels trying new equipment, occupying space or attempting unfamiliar movements.**

When confidence is already fluctuating, this matters.

The question is not whether gyms are safe. It is whether they are designed in a way that supports gradual confidence building, rather than assuming confidence is already present.

Designing for confidence to follow participation

Earlier sections highlighted an important dynamic. If joining a gym requires prior confidence, fewer women will feel able to start. If participation builds confidence, then **the environment needs to support women at the point where they feel least certain.**

When reassurance and atmosphere are prioritised by such a substantial proportion of women, design becomes central to inclusion. It is not simply about offering opportunity. It is about shaping conditions in which opportunity feels achievable.

In this context, safety and comfort are not secondary concerns. They are part of the structure of the experience itself.

Inclusion is often framed as welcoming more women into gyms. But welcome alone is not enough if the environment does not support them once they arrive. Long-term participation depends on whether attendance feels manageable rather than intimidating.



Section 7

The Role of Women-Only Spaces

A response to pattern, not a reaction to trend

The preceding sections have highlighted consistent themes. Participation for many women is episodic. Re-entry can feel fragile. Motivation centres on health and wellbeing rather than performance. Environment plays a significant role in whether attendance feels manageable.

Within that context, the question becomes how design can respond.

Women-only gym spaces are sometimes framed as divisive or unnecessary. They may also be seen as a marketing trend. Neither interpretation captures the full picture.

When repeated breaks and returns are a common feature of women's participation, the question is not capability. It is whether the environment supports women across the realities of changing life stages and the shorter, shifting demands that shape everyday life.

Women-only spaces can be understood as one structural response to that question.

Reducing the threshold for entry

For some women, the primary barrier to participation is not equipment, programming or price. It is comfort.

Earlier findings showed that staff visibility and cleanliness are priorities for many women members. These factors shape whether the space feels safe and well managed.

A women-only environment can reduce certain forms of self-consciousness and comparison. It can provide a space where experimentation feels lower risk. It can support re-entry for women who have experienced interruption, illness or identity shift.

This does not mean that mixed environments are inherently exclusionary. It means that some women experience a different level of ease when the composition of the space changes.

Lowering the psychological threshold for entry can have measurable impact on participation.

Designing for difference

Designing a space for everyone does not automatically mean it works equally well for everyone.

Women-only provision acknowledges that women's participation patterns differ in scale and structure. It recognises that comfort, visibility and confidence interact in specific ways.

Importantly, such spaces are not designed to serve all women. Many women prefer and thrive in mixed environments. Women-only spaces do not replace those environments. They sit alongside them.

The purpose is not separation for its own sake. It is responsiveness to evidence.

Beyond symbolism

It is possible to approach women-only spaces symbolically, as a visible gesture towards inclusion. That approach risks being superficial.

A more substantive approach considers layout, staffing, atmosphere and programming. It considers how women move through space, where they feel most exposed and how progression can be supported without pressure. It also recognises that much gym equipment has historically been designed around male body dimensions, which can affect comfort, grip and usability for many women, particularly those with smaller frames or hands.

If the wider participation gap reflects recurring discomfort or interruption, then structural design responses deserve serious consideration.

The question is not whether women-only spaces are the solution. It is whether the sector is willing to experiment with design-led approaches when the data points to consistent patterns.

A broader implication

The conversation about women-only spaces ultimately extends beyond the concept itself.

It invites a broader reflection on how gyms are designed, who they are optimised for and how adaptable they are to changing life stages. If participation is episodic and motivation is steady rather than performative, then environments must accommodate that reality.

Women-only spaces represent one such response.

They are not a step back from inclusion. They are one way of putting it into practice.

One such response has been developed by Total Fitness through the creation of The Women's Gym, purpose-built women-only spaces launched (at the time of writing) at two locations within its club network. The following section examines what has been learned from that initiative.

Section 8

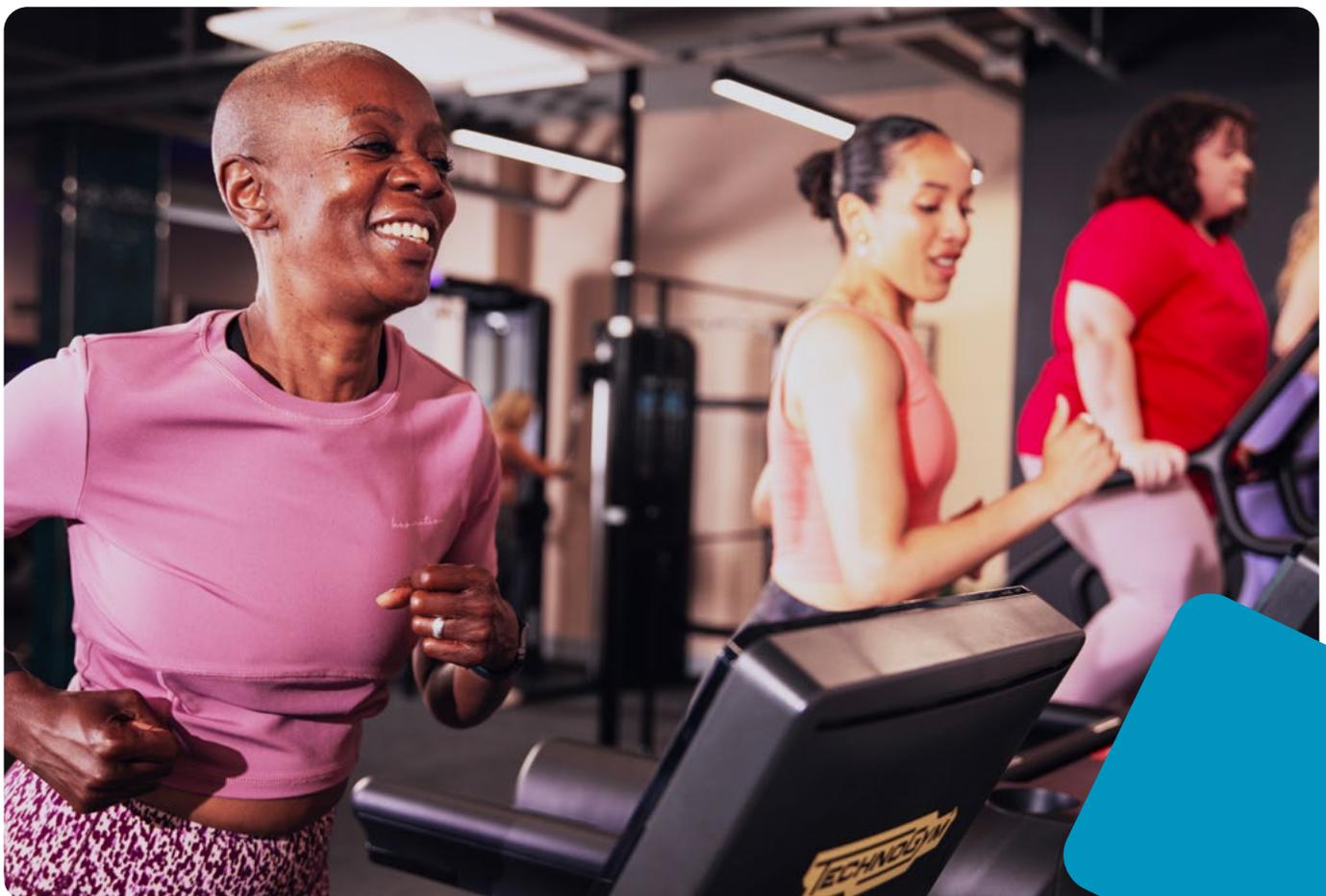
Learning from The Women's Gym

From insight to implementation

In response to the patterns identified through research and consultation, **Total Fitness developed The Women's Gym, a purpose-built women-only space launched within its Whitefield club in January 2024.** A second location was added in Wilmslow in September, later the same year.

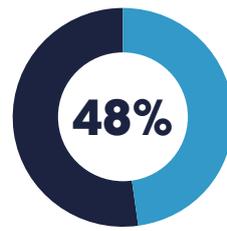
The initiative followed structured engagement with more than 150 women, alongside wider research involving thousands of responses. The message was consistent. **Many women wanted a space where they could feel at ease while working out.** Not separated for symbolic reasons, but designed around comfort, reassurance and practical needs.

The Women's Gym was therefore conceived as a test of a simple proposition: if the environment changes, does participation change with it?

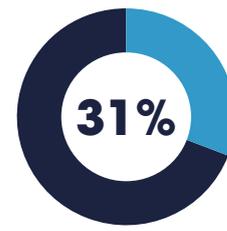


Who joined?

The membership data suggests that it does.



Not active gym members



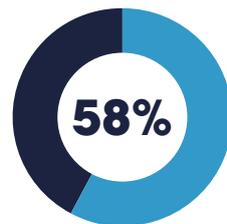
Outside the system for more than 5 years

Nearly half of The Women's Gym members (48%) were not active gym members immediately prior to joining. Among those who had previously belonged to a gym, 31% had been outside the system for more than five years.

These are not people on a 'pause'. These gaps represent meaningful disengagement.



At the same time, 20% of The Women's Gym members had never previously been part of a gym or health club. **One in five are first-time participants.**



The age profile skews younger than the national women gym member base, with **almost 58% of members under 35**. This may indicate that younger women are particularly responsive to environments that explicitly prioritise comfort and confidence at the stage when habits are being established.

Taken together, the data suggests that The Women's Gym is both reactivating women who had stepped away and lowering the threshold for those who had never joined.

Why they chose it?



76%

Comfort



23%

Safety or harassment concerns



22%

Religious or cultural reasons

When asked why they joined The Women's Gym, 76% cited comfort. This was by far the most common reason.

Safety or harassment concerns were cited by 23%, and religious or cultural reasons by 22%. These factors are important, but they are not dominant. The primary motivation is broader and more everyday: the desire to feel comfortable.

Members interviewed spoke about being able to focus on their workout without distraction, feeling less self-conscious and being more willing to try new equipment. The value lay in the atmosphere rather than in separation as an end in itself.

This reinforces a wider pattern seen in external reporting, where 35% of women said they had previously left a gym because they wanted a more private or single-sex environment

The issue is not capability. It is ease.

What changed?

The most compelling evidence lies in activity levels.

Before joining The Women's Gym, **22% of members reported doing no physical activity over a four-week period. After joining, that figure fell to 1%.**



Regular participation also increased significantly. **Prior to joining, only 14% exercised nine or more times per month. After joining, 48% reported doing so.**



This shift from inactivity or sporadic engagement to consistent participation suggests that when the psychological threshold for entry is lowered, behaviour changes.

The impact is measurable.

Protecting the conditions

Sixteen months after memberships first went on sale in October 2024, The Women's Gym at Total Fitness Whitefield **reached its deliberately capped membership limit and introduced a waiting list.**

This milestone followed a cautious launch strategy. When the space first opened in January 2024 it operated as a bolt-on facility for existing Total Fitness members only. Even after extensive research into women's participation barriers, there was still some uncertainty about whether a women-only training space would generate sufficient new demand to sustain a standalone membership offer.

That uncertainty proved unfounded. When memberships were opened to non-members in October 2024, demand quickly demonstrated that the concept was addressing a previously unmet need.

In this sense, the response echoed a wider pattern identified in the research. **Many women are not rejecting gyms altogether, but waiting for environments that feel more compatible with how they want to participate.**

Membership numbers were deliberately capped to preserve the quality of experience and prevent overcrowding. This decision reflects a recognition that environment can quickly be diluted if growth is unmanaged.

Earlier in this paper, overcrowding emerged as a common concern among women. Restricting membership levels represents a practical commitment to maintaining the conditions that members value.

In a sector often driven by volume, choosing to protect atmosphere and usability sends a clear signal about priorities. That participation is sustained not simply by access, but by the quality of the environment once women arrive.

What this demonstrates?

The Women's Gym is not positioned as a universal model. Many women continue to prefer and thrive in mixed environments.

However, the evidence from this initiative demonstrates that design-led adjustments can materially influence participation. When comfort is treated as a structural element rather than an optional extra, women who had disengaged return. Women who had never joined begin.

Environment is not neutral. It shapes who enters, who stays and who builds habit.

The lesson for the wider sector is not replication, but responsiveness. When participation data highlights recurring patterns, meaningful design responses deserve serious consideration.

Section 9

A Call for Design-Led Change in the UK Fitness Sector

Participation is not a fixed trait

This paper has highlighted a consistent pattern. Women’s participation in gyms is not static. It rises, falls and re-emerges across life stages.

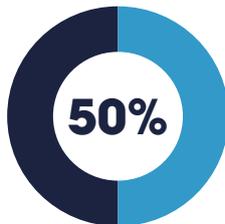
Nearly half of non-gym women nationally have previously been members (50%). Among those who are not currently active, **41% report multiple breaks over the past decade.**

These figures do not suggest indifference. They suggest interruption.

When 34% of non-members say they have no interest in joining a gym, it is tempting to treat the remainder as simply unconvinced. Yet the data shows that many have been part of the system before. Participation is not absent. It is conditional.

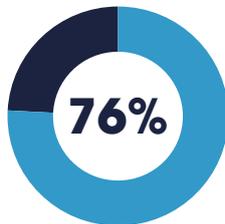
The implication is important. **If participation fluctuates, then environments must be adaptable. If re-entry is common, then re-entry must be supported.**

Comfort is not a secondary issue



Nationally, **50% of women members rate staff presence for safety and comfort as very or extremely important.**

Cleanliness, atmosphere and overcrowding consistently influence experience.



Within The Women’s Gym, **76% cited comfort as the primary reason for joining.** Where comfort increased, activity increased.

These patterns reinforce a simple conclusion: comfort is not peripheral. It shapes behaviour.

Inclusion cannot be confined to marketing campaigns or policy statements. It must be reflected in layout, staffing, density, programming and atmosphere. Design choices influence confidence, and confidence influences participation.

Not one solution, but a willingness to respond

Women-only provision is one response. It is not the only one.

Many women continue to thrive in mixed environments and would not choose a single-sex space. The point is not to prescribe a universal model. It is to recognise that different environments serve different needs.

What matters is responsiveness.

When data consistently shows that participation is episodic, that **comfort drives decisions and that environment shapes behaviour**, the sector has a responsibility to test structural solutions.

The Women's Gym represents one such test. It demonstrates that thoughtful adjustments to environment can reactivate women who have stepped away and encourage first-time participation. It also demonstrates that protecting experience, even at the expense of rapid growth, strengthens long-term engagement.

From advocacy to action

The UK fitness sector has evolved significantly over the past decade. Facilities are more sophisticated. Programming is more diverse. Technology is more embedded.

The next stage of evolution may be less about equipment and more about experience.

If gyms are to support women consistently across life stages, then design must account for fluctuating confidence, changing identity and practical constraints such as time and childcare. Staff training, spatial layout, membership structures and crowd management all play a role.

The goal is not to shield women from challenge. It is to remove unnecessary barriers so that challenge can be embraced.

A shared opportunity

The opportunity for the sector is clear.

When inactivity falls from 22% to 1% in a redesigned environment, and when consistent participation more than triples, the message is not limited to one club. It points to a broader possibility.

Participation is not solely a matter of motivation. It is shaped by context.

If gyms are designed to make attendance feel manageable rather than intimidating, more women will participate, return and remain.

For Total Fitness, The Women's Gym is not a finished product. It is part of an ongoing process of listening, testing and refining. The wider ambition is to contribute constructively to a sector conversation about how women experience gyms, and how that experience can evolve.

Positive change begins with evidence. It continues with action.

Behind this paper



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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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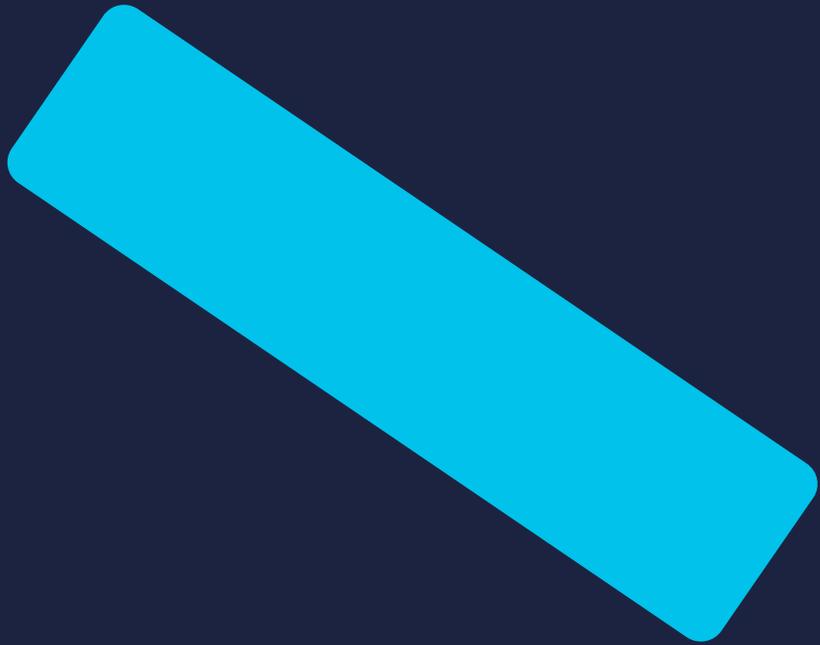
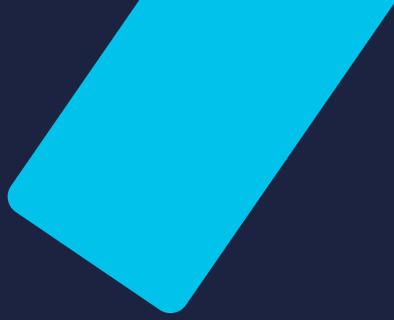
Sensu

Sensu Insight is a research and insight consultancy that helps organisations understand how they are perceived, how markets are evolving, and what drives trust and behaviour among their key audiences.

Working with clients across the private and public sectors, Sensu provides independent evidence to inform brand strategy, communications and organisational decision-making.

Our work combines surveys, stakeholder interviews and analysis of public conversations to understand reputation, track changing perceptions and measure the impact of marketing and communications activity - helping organisations demonstrate value and make better-informed decisions.





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