totalfitness

White paper series

The Great Reset?

What really changed in fitness, wellbeing and health club membership, five years on.


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Jordan

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Introduction

The reopening was only the beginning

In April 2021, health clubs across the UK reopened their doors after the most disruptive period the fitness sector had ever experienced.

For months, people had been unable to access gyms, pools and health clubs. Established routines had been interrupted. Fitness habits had been reshaped. Many had found new ways to stay active, while others had fallen out of regular exercise altogether.

Reopening didn't mark a simple return to normal. It took place at the beginning of a wider period of social and economic change. Over the following five years, people experienced the growth of hybrid working, rising living costs, greater awareness of mental wellbeing, rapid growth in fitness technology, and an expanding range of fitness experiences and communities.

> **At the time, the sector was asking big questions about what would happen next.**

Would a major health scare lead to a surge in health club membership, as people placed greater emphasis on their physical health? Or would members stay away, having replaced the gym with walking, home workouts, online classes or other routines that felt easier, cheaper or more convenient?

There were also questions about the role of digital fitness. During lockdown, online workouts, apps and content providers became more visible than ever. Some wondered whether digital fitness would permanently reduce the role of the physical club, or even change the need for staff, support and human interaction.

Other assumptions were shaping the conversation too. Mental wellbeing was expected to play a greater role, although it was not yet clear how strongly this would influence membership. Shared and enclosed facilities faced obvious questions. At the same time, many expected future growth to be driven heavily by younger members whose early adult lives had been shaped by lockdown.

Five years on, the picture is more complex than any single assumption allowed for.

Today's health club member is making decisions in a very different context.

This report uses the reopening period as a benchmark. It looks at how the attitudes, behaviours and expectations of new members have evolved since 2021, and what those changes say about the future of health clubs.

The findings point to a customer whose relationship with fitness has broadened. Fitness is increasingly connected to lifestyle, long-term health, wellbeing and personal identity.

Members are combining multiple forms of activity, weighing up value carefully, and bringing more specific expectations into the club environment.

At the same time, the research also challenges some assumptions about the modern fitness consumer. Digital tools and flexible fitness options have become more visible, but members still place significant value on physical spaces, human interaction, high-quality facilities and experiences that cannot easily be replicated at home.

This paper explores what has changed, and how the sector can respond to members whose needs continue to evolve.

About The Research

National population research

This report draws on a continuous programme of research conducted for Total Fitness exploring changing attitudes towards fitness, health and health club membership.

Since 2019, Total Fitness has regularly surveyed its own members, industry professionals and the wider UK public to understand how people think about fitness, what they expect from health clubs and how their habits, motivations and experiences are changing over time.

Total Fitness provides a useful perspective on these changes because its member base is broad. Its clubs serve a wide range of age groups and communities across the North of England and Wales, rather than being concentrated in a single city or a narrow urban market. This gives the research a view of health club membership that is reflective of a regional audience and a range of different life stages.

> **A central comparison in this report is between two waves of research with new Total Fitness members. In 2021, shortly after the fitness sector reopened following pandemic restrictions, Total Fitness surveyed 750 new members who had joined during that reopening period. In 2026, the research was repeated with 770 new members, representing the latest intake of people joining Total Fitness five years on.**

Both new member surveys were conducted online by Sensu Insight. Responses were reviewed, cleaned and checked for quality, consistency and completeness before analysis.

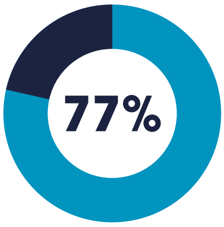
Where questions were asked in both 2021 and 2026, the report compares results across the two waves. Where new questions were introduced in 2026, findings are presented as a current view of the 2026 new member audience rather than as a measure of change over time.

The research is designed to help understand how the profile, expectations and motivations of new health club members have evolved since the sector reopened, and what those changes reveal about the future direction of the fitness market.

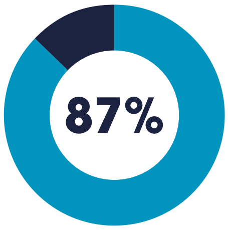
Summary findings

The health scare did not create a simple health club boom.

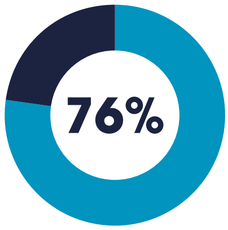
While **77% of new members say fitness is more important to them than it was five years ago**, the strongest shift is around long-term health, with 87% saying they think about this more than they did previously. A further **76% place greater emphasis on mental wellbeing**, showing that fitness is now tied to broader goals than working out alone.



Say fitness is more important to them than it was five years ago



Think about long-term health more than they did previously



Place greater emphasis on mental wellbeing

Growth is being shaped more by switchers than first-time gym users.

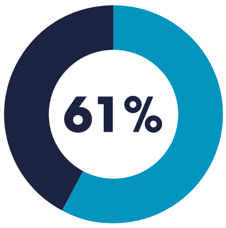
First-time gym members now account for 11% of new members, down from 22% in 2021, while the proportion **switching directly from another operator has increased from 44% to 57%**.

Digital fitness is complementing the health club, not replacing it.

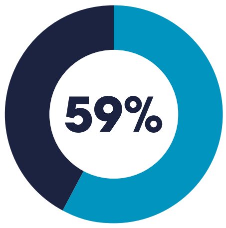
One in ten new members **(10%) regularly use fitness apps** and **21% use home workouts or home fitness equipment**, but only 2% take part in online fitness classes and 37% do not regularly participate in any of the alternative fitness activities included in the research.

Members are building more varied fitness routines.

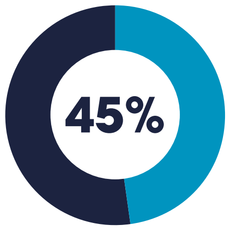
Six in ten new members **(61%) say they now combine different types of fitness activity** more than they did five years ago, while **59% are trying new fitness experiences more often** and **45% are exercising outdoors more frequently.**



Now combine different types of fitness activity more than they did five years ago



Try new fitness experiences more often



Exercise outdoors more frequently.

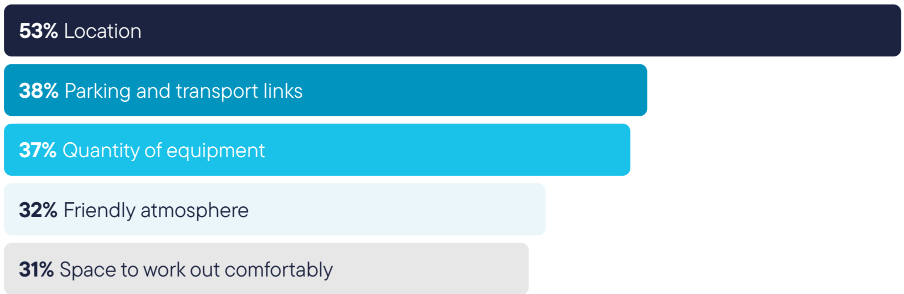
Summary findings continued

Shared and recovery facilities remain a major draw.

The swimming pool was the most influential facility in the decision to join, cited by 68% of new members, ahead of the gym itself **(48%), with sauna or steam facilities (51%) and hydrotherapy facilities (47%)** also strongly influencing choice.

Health clubs are being judged against a wider set of criteria.

Location remains important, cited by 53% of new members, but practical and experiential factors also play a major role. **Parking and transport links have increased to 38%**, **quantity of equipment has risen to 37%**, while **friendly atmosphere (32%)** and **space to work out comfortably (31%)** are also influential in 2026.



Members would cut elsewhere before giving up the club.

Only 22% describe membership as a luxury they would keep only if money remained after other spending priorities, while **78% would cut back elsewhere** or **treat membership as essential**.

The ‘reopening generation’ is where new fitness behaviours are most concentrated.

The shift towards more varied fitness routines appears across the membership base, but is **strongest among those aged 18 to 24**, with **81% saying they now combine different types of fitness activity more than they did five years ago** and **89% saying they are trying new fitness experiences more often**.

Section 1

The meaning of ‘fitness’ has changed

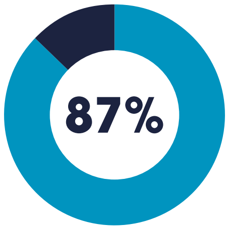
Fitness occupies a different place in people’s lives than it did five years ago

If there is one clear message running through this research, it is that fitness occupies a different place in people’s lives than it did five years ago.

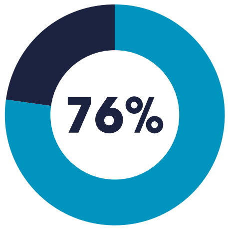
The pattern runs across several measures. New members are placing greater importance on fitness itself, but the stronger story is the way exercise is now linked to long-term health, mental wellbeing, lifestyle and personal priorities.

> **When asked to reflect on the last five years, 77% of new members said fitness is more important to them today than it was previously. The wider data shows that this is part of a broader shift in how members think about the role fitness plays in their lives.**

Nearly nine in ten members **(87%) say they think more about their long-term health than they did five years ago**. Three quarters **(76%) say they place greater emphasis on their mental wellbeing**.

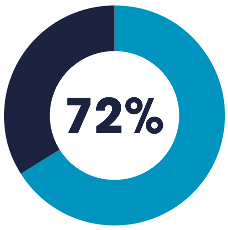


Think about long-term health more than previously

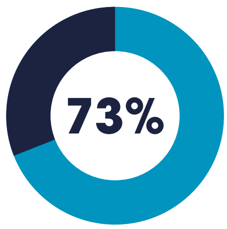


Place greater emphasis on mental wellbeing

Almost three quarters say fitness has become more part of their lifestyle (72%) and that **they spend more on fitness and wellbeing than they did previously (73%)**.



Fitness has become more part of their lifestyle



Spend more on fitness and wellbeing then previously

These findings show something more substantial than a growing interest in exercise alone. They point towards a change in priorities, where fitness is increasingly viewed as part of a wider approach to health and wellbeing rather than a standalone activity.

That distinction matters.

For many years, the fitness industry has often framed participation around specific goals such as weight loss, improving appearance, building strength or fitness levels. These motivations remain important and continue to drive participation. **Yet the strongest findings in this research sit beyond traditional fitness outcomes.**

Fitness is becoming the input, not the outcome

In this sense, **fitness is increasingly being treated as an input, not the output.**

For many members, the end goal is not simply to exercise more, lift more, lose weight or improve appearance. Fitness is becoming part of how people support their long-term health, manage stress, maintain routine, improve confidence and protect their overall quality of life.

> **That shift matters for health clubs because it changes what members may be looking for when they join. If fitness is seen as part of a wider approach to living well, then the club is judged both on the workout it enables and on the role it plays in helping members feel healthier, more supported and more in control.**

Many consumers are no longer viewing fitness simply as something they do. Instead, it is becoming part of how they look after themselves.

This is particularly important in relation to mental wellbeing.

Structured fitness has always had a role to play in supporting mood, confidence and routine. What appears to have changed is the extent to which members are consciously connecting fitness with how they feel, cope and manage everyday life. Health clubs may be benefiting from a broader shift in how people think about looking after themselves.

Mental wellbeing is not simply an outcome of exercise. For many members, it may now be one of the reasons they seek out structured fitness in the first place.

Not just a Gen Z story

Importantly, this pattern is not confined to one age group.

Although younger members report particularly strong levels of change, this should be interpreted carefully. A comparison with five years ago inevitably captures a period of significant life transition, as teenagers become young adults. More persuasive is the fact that similar patterns are evident across older age groups who are comparing their current attitudes with established adult routines and lifestyles.

Among members aged 45 to 54, more than three quarters **(77%) say fitness is more important to them than it was five years ago**. The **figure remains high amongst those aged 55 to 64 (70%)** and those **aged 65 and over (73%).** A similar pattern appears when members are asked about long-term health, mental wellbeing and the role fitness plays in their lifestyle.

> **This is important because the post-Covid fitness story is often assumed to be driven largely by younger adults.**

Younger members are clearly important, and they show some of the strongest changes in behaviour. But the data does not support a simple Gen Z growth story. The shift towards fitness, health and wellbeing is visible across older age groups too, including members comparing their current priorities with established adult routines rather than teenage lifestyles.

The change, therefore, appears to be broader than one generation. It points to a wider reassessment of health, wellbeing and the role fitness plays in everyday life.

Newcomers are not starting from zero

One of the most revealing findings comes from those joining a gym for the first time.

Members who have never previously belonged to a gym (called 'newcomers' in this report) are amongst the most likely to say that fitness has become more important to them over the last five years. They are also more likely than average to say fitness has become part of their lifestyle and that they spend more on fitness and wellbeing than they once did.

This is significant because it challenges a common assumption about the link between fitness and gym membership.

It is often assumed that joining a gym leads people to become more engaged with fitness. The evidence here is that the opposite may also be true. Many first-time members appear to have undergone a change of perspective towards health and wellbeing before joining.

Membership is not necessarily the catalyst for that change. In many cases it may be the outcome of it.

With this in mind, many new members appear to arrive with a relationship with fitness that has already evolved. They have clearer motivations, clearer expectations and a greater understanding of the role fitness plays in their lives.

Clubs need to understand their appeal

For operators, this creates both an opportunity and a challenge.

As fitness becomes more closely connected to wider aspirations around health, wellbeing and quality of life, expectations of health clubs are likely to evolve as well. Members who view fitness as an investment in their future health may be looking for more than access to equipment. They may now place greater value on environments, facilities, support and experiences that help them achieve their personal goals.

The challenge for the sector is not just responding to greater interest in fitness. It is understanding how the meaning of fitness itself may be changing.

That means health clubs need to look carefully at the role they play in members' lives.

If fitness is increasingly connected to long-term health, mental wellbeing, confidence and quality of life, then the appeal of a club may lie in different places for different people. For some, it may be the facilities. For others, it may be space, atmosphere, reassurance, recovery, convenience, staff support or the ability to build a routine that feels sustainable.

For operators, the harder task is understanding why members choose one club over another, and whether the offer reflects the wider role fitness now plays in their lives.

A changing customer, not simply a new one

There is, however, an important nuance within the data.

While attitudes towards fitness have changed significantly, the sector is not necessarily attracting more first-time gym users than it was five years ago.

In 2021, more than one in five new members (22%) had never previously belonged to a gym or health club. By 2026, that figure had fallen to 11%.

2021 → 2026

22%
Had never previously belonged to a gym

11%
Had never previously belonged to a gym

Over the same period, the proportion of members switching directly from another operator increased from 44% to 57%, while the proportion of returners remained broadly stable.

At first glance, this might suggest a market increasingly shaped by competition between clubs rather than by large numbers of new audiences entering the sector. But the data points to a more interesting interpretation.

The mix of new members has changed, but so have the expectations and motivations they bring with them. Whether they are experienced gym users, people returning after a break or newcomers, today's members appear to think differently about fitness than they did five years ago. Health, wellbeing, lifestyle and long-term quality of life now play a more prominent role in how people view exercise and the place it occupies within their lives.

The story of the last five years may therefore be less about the emergence of a completely new customer and more about the evolution of the existing one.

Section 2

The gym is no longer the whole story

The last five years have seen a significant expansion in the number of ways people can engage with fitness

Consumers are now free to choose from an ever-growing range of options, from fitness apps and online content to specialist events, outdoor exercise, organised communities and home-based training. The barriers to participation have arguably never been lower, while the range of available options has never been greater.

In 2021, it was reasonable to ask whether this would permanently reduce the role of the health club. Members had spent months finding ways to exercise without gyms, pools or shared facilities. Digital workouts, home equipment, walking and outdoor exercise had all become more visible parts of the fitness landscape.

> **Five years on, the evidence points to a different conclusion. These alternatives have become part of the fitness mix, but they have not replaced the health club.**

For many members, the health club remains the foundation of their fitness routine. More than a third (37%) say they do not regularly participate in any of the alternative fitness activities included in this study. While outdoor exercise, home workouts and other activities all play a role, there is little evidence that members are abandoning health clubs in favour of purely digital or home-based alternatives.

Some of the most talked about developments of recent years remain relatively limited within this new member sample. One in ten members **(10%) regularly use fitness apps**, while **only 2% participate in online fitness classes**. **Home workouts and home fitness equipment are used by around one in five members (21%)**.

Yet focusing solely on individual activities risks missing the bigger story.

The more significant change is in the breadth of people's fitness behaviour rather than the popularity of any single activity. Six in ten members (61%) say they now combine different types of fitness activity more than they did five years ago, while a similar proportion (59%) say they are trying new fitness experiences more frequently. Nearly half (45%) report exercising outdoors more often and over a third (36%) say they make greater use of fitness apps and online content.

In combination, these findings show that fitness is becoming less tied to a single environment, routine or activity. Many members are creating their own personal mix, with health club visits sitting alongside walking, cycling, swimming, fitness content, organised events or outdoor exercise. Different activities serve different purposes, from building strength and maintaining health to supporting wellbeing, adding variety or fitting exercise around everyday life.

The growth of fitness choice has not necessarily reduced the role of the health club. It may be changing the role it plays.

What health clubs offer that other formats cannot

As fitness has become more varied, the role of the health club has arguably become more interesting.

The findings show that members' interests go beyond looking for a place to exercise. Instead, many appear to be seeking access to a range of facilities and experiences.

Among new members at Total Fitness, the swimming pool was the single most influential facility in the decision to join, cited by more than two thirds (68%). Around half said their decision was influenced by access to a sauna or steam room (51%), the gym itself (48%) and hydrotherapy facilities (47%). More than a third (35%) highlighted the importance of having a spacious gym floor with enough room to work out comfortably.

This is notable given some of the questions that surrounded shared facilities during and immediately after the pandemic. At the time, it was reasonable to ask whether enclosed or communal spaces would become less appealing. Five years on, the opposite appears to be true within this new member group. Pools, sauna and steam facilities, hydrotherapy and spacious workout environments are not peripheral to the decision to join. They are among the strongest reasons people choose a club.

The data cannot prove this is a direct post-Covid effect, but it does suggest that members place real value on facilities that support comfort, recovery, routine and a more rounded approach to health.

Viewed alongside the wider trends explored in this report, it is clear members are looking for facilities that support a more varied approach to health and wellbeing.

The appeal of the swimming pool, wellness facilities and spacious workout environments points towards a better understanding of what a health club can provide. For many members, fitness is no longer simply about access to equipment. It is about having access to a range of facilities that support different activities, different goals and different stages of their journey.

As fitness becomes more closely connected to long-term health, wellbeing and lifestyle, members appear to place greater value on environments that can support those wider objectives. These facilities are attractive in their own right, but their wider value lies in how effectively they enable members to pursue different aspects of their health and wellbeing within a single destination.

Rather than reducing the importance of health clubs, the growth in fitness choice appears to be changing what people value about them. In a market full of flexible, low-barrier ways to stay active, the modern health club succeeds by offering something different: space, facilities, structure, social connection and experiences that cannot easily be recreated at home.

Younger members are building fitness differently

Younger members are the clearest example of how fitness habits are becoming more varied, experimental and supported digitally.

Members aged 18 to 24 are significantly more likely than older age groups to report combining different forms of fitness, experimenting with new activities and making greater use of digital fitness content.

Over eight in ten (81%) say they combine different types of fitness activity more than they did five years ago, while almost nine in ten (89%) say they are trying new fitness experiences more often.

These findings should be interpreted with some caution. Younger adults are naturally at a stage of life where habits, interests and routines can change quickly. However, the scale of the difference suggests something more than life stage alone.

Younger members appear less likely to define fitness through a single activity or environment. Instead, their participation is characterised by variety, experimentation and movement between different forms of exercise. Fitness is something they build around their lifestyle rather than something confined to a specific place or routine.

For health clubs, this matters because younger members are not necessarily choosing between the gym and other forms of activity. Increasingly, they are doing both.

> **The future of fitness is unlikely to belong to any single format. It will be shaped by consumers who combine activities, adapt their routines and engage with fitness in ways that are personal to them.**
>
> **But the health club has not been pushed to the margins of that landscape. For many members, it sits at the centre of a wider fitness ecosystem, alongside digital content, outdoor activity, organised events and informal exercise.**
>
> **That is one of the clearest lessons from the last five years. The health club has not been replaced by the alternatives that grew during lockdown. Instead, its role has changed. It now needs to work alongside those alternatives while continuing to offer the facilities, space, structure, community and experience that other formats cannot easily provide.**

Section 3

The new test for health clubs

Five years on, the picture feels different

As fitness has become more embedded within people's lifestyles, expectations of health clubs appear to be changing too.

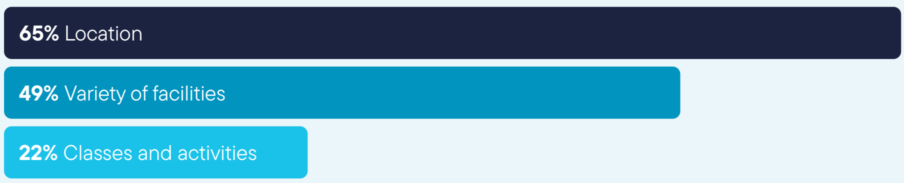
The consumer emerging from lockdown in 2021 was primarily concerned with returning to activity, rebuilding routines and regaining confidence. Fitness had suddenly become more visible in people's lives and health clubs played an important role in helping many people re-establish habits that had been disrupted during the pandemic.

Five years on, the picture feels different.

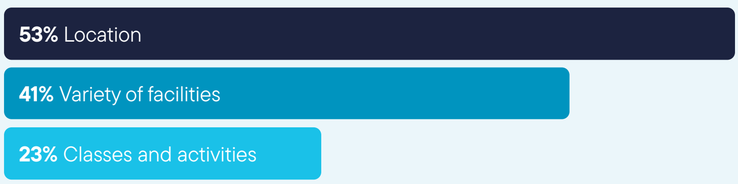
Fitness is more firmly embedded within people's lifestyles and, as a result, many seem to be making more considered decisions about where and how they choose to exercise. They are not just looking for access to equipment or somewhere convenient to work out. Increasingly, they appear to be evaluating how well a health club supports their full needs, routines and aspirations.

This does not mean that the traditional drivers of membership have disappeared. Convenience remains one of the strongest influences on gym choice, with location cited by 53% of new members, compared with 65% in 2021. Variety of facilities remains another important factor, influencing 41% of new joiners, compared with 49% five years ago. The importance of classes and activities has remained remarkably consistent, cited by 23% of members in 2026 compared with 22% in 2021.

2021 drivers of membership



2026 drivers of membership



The fundamentals still matter

The fundamentals of gym choice remain largely intact. Members still want facilities that are convenient, accessible and capable of supporting their fitness goals.

> **What is changing, however, is the breadth of factors people appear to consider when evaluating a club.**

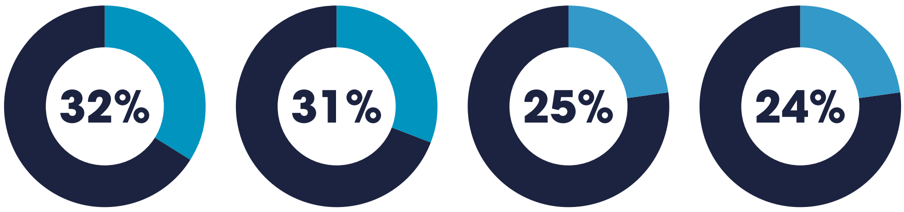
Compared with 2021, members place greater emphasis on practical aspects of the overall club experience.

The importance of parking and transport links has increased from 30% to 38%

The quantity of equipment available has risen from 31% to 37%.

The influence of friends and family members has also grown, increasing from 19% to 26%, suggesting that personal recommendations and social connections may be playing a greater role in decision making.

The responses in 2026 also highlight a number of factors that were not explored in the original study but appear increasingly relevant to today's consumer. Around a third of members say a friendly atmosphere (32%) and having enough space to work out comfortably (31%) **influenced their decision to join**. A quarter cite opening hours (25%) and wellness or recovery facilities (24%).



Friendly atmosphere | Having enough space to work out comfortably | Opening hours | Wellness or recovery facilities

The role of staff and human interaction remains important

One of the questions raised during the growth of digital fitness was whether technology and content would reduce the need for human support in the club environment. The 2026 data shows that this support still matters. **Helpful staff influenced around one in five new members overall** and **more than a quarter of newcomers,** while **friendly atmosphere shaped the decision to join for almost a third of new members.**

Members are also judging clubs on how they make them feel. Helpful staff, a friendly atmosphere and a sense of welcome all matter because they give people confidence that they can build and sustain a routine.

> **Digital content can support fitness, but it cannot easily replace the reassurance, encouragement and everyday human contact that many members still value in a club environment.**

Space is a competitive advantage

The importance of space is particularly interesting in the post-reopening context.

The data cannot show whether this is a direct legacy of social distancing, but it is reasonable to ask whether members have become more conscious of space, comfort and ease of use since the pandemic. A spacious gym floor is not only a practical benefit. It may also shape how relaxed, confident and in control members feel when they use the club.

This matters because it shows how decision criteria have widened. Members are not only judging what a club contains, but how it feels to use.

The impact on club selection

This wider set of criteria is also reflected in how people approach the choice of club itself.

> **Members are not always joining the first club they encounter. Six in ten considered more than one gym before joining, showing that many are weighing up alternatives before committing.**

At the same time, the decision does not appear to involve comparing every possible operator in the local market. Almost **one in five considered three different operators**, suggesting that members are selective in the clubs they seriously evaluate.

This points to a more considered choice, but not an unlimited one. Members may have more options than ever, but the clubs that make it into their consideration set still need to feel relevant, accessible and clearly suited to their needs.

Value is more than price

The last five years have placed sustained pressure on household finances and it would be reasonable to expect cost to dominate decision making. Yet discounts and promotional offers appear to have relatively limited influence compared with facilities, convenience and the wider membership experience.

Instead, the findings point towards a more rounded assessment of value. Members appear to be weighing up the complete offer rather than simply comparing monthly fees. Location, facilities, atmosphere and ease of use all seem to form part of the equation.

The way members view the value of membership reinforces this picture. When asked how they would prioritise their membership if household finances came under pressure, **only 22% described it as a luxury they would only retain if money remained after other spending priorities**. By contrast, **78% said they would either cut back on luxuries and treats first**, reduce other discretionary spending or **viewed membership as an essential item they would be very reluctant to give up**.

Particularly notable is the commitment shown by newcomers. One third (33%) described membership as essential, almost matching the figure amongst switchers (37%).

> **This suggests that many first-time members aren't experimenting with fitness. They appear to be making a deliberate commitment to prioritising it within their lives.**

This may reflect the previously discussed changes in how fitness is viewed. Throughout this research, members have described fitness as becoming more important in their lives and more closely connected to health, wellbeing and quality of life. Against that backdrop, membership is perhaps less likely to be judged as a discretionary purchase and more likely to be viewed as an investment in personal wellbeing.

For operators, this raises the bar**. Consumers are not necessarily expecting the cheapest membership, but they do appear to be expecting a stronger overall proposition.** The challenge is no longer simply attracting attention. It is demonstrating why a particular club deserves an ongoing place within someone's routine, lifestyle and wellbeing journey.

Section 4

Matching the offer to the member journey

One of the clearest findings from this research is that there is no longer a single route into health club membership. For this analysis, new members have been divided into three groups of joiners.

Switchers

Switchers were members of another gym or health club immediately before joining the club. They are experienced gym users who have moved from one provider to another.

Returners

Returners had previously been members of a gym or health club but not immediately before joining. They have experience of gyms but had stepped away before coming back.

Newcomers

Newcomers had never previously been members of a gym or health club. For this group, joining the club represents their first experience.

These distinctions matter because the groups are not only arriving with different histories, but also different motivations, expectations and decision-making patterns. Some are looking for a better fit. Some are rebuilding a habit. Others are taking a first step into structured fitness.

Compared with 2021, the 2026 intake is more heavily weighted towards switchers, making it especially important to understand how experienced gym users now evaluate the market.

Switchers

Seeking a better fit

For switchers, the decision to join is not really a decision about fitness. They have already made that commitment.

Instead, their decision is about finding a club that better matches their needs and expectations. More than half of switchers (53%) cited the gym itself as a factor in their decision to join, compared with 44% of returners and 46% of newcomers. They were also more likely to value sauna and steam facilities (58%), wellness and recovery facilities (31%), the quantity of equipment available (40%) and having enough space to work out comfortably (35%).

Switchers membership drivers

Demographically, **switchers are most concentrated in the 25 to 44 age range**. Almost half (46%) sit within this band, compared with 43% of returners and 25% of newcomers. They are also the most balanced group in gender terms, with men accounting for 44% of switchers compared with 39% of returners and 34% of newcomers.

This paints a picture of a group whose fitness habits are already relatively established. While three quarters (76%) say fitness has become more important in their lives over the last five years, they are less likely than newcomers to report major lifestyle shifts. Rather than discovering fitness, they appear to be refining how they engage with it.

> **For this group, choosing a health club is less about making a commitment to fitness and more about finding a better environment in which to pursue it.**

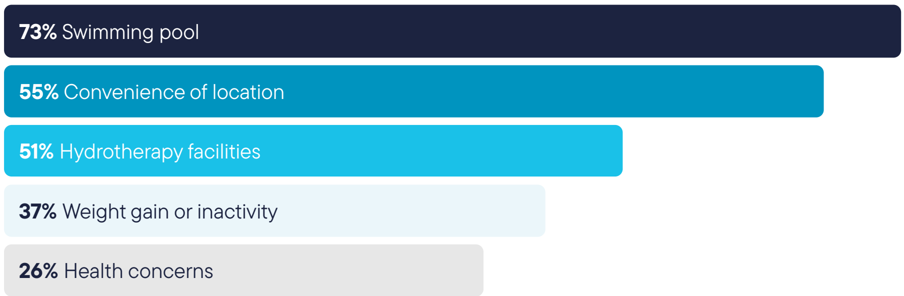
Returners

Rebuilding routine

Returners tell a different story.

Compared with newcomers, they are more likely to name weight gain or inactivity (37% vs 31%) and health concerns (26% vs 22%) as reasons for joining. They also record the strongest positive shifts in attitudes towards long-term health (89%) and mental wellbeing (80%), suggesting that these wellbeing considerations play an important role in their decision to return.

Returners membership drivers



Returners also tend to be slightly older than switchers, with a stronger representation of members aged 55 and over (33% compared with 22% of switchers). Women account for 61% of the group. While demographics alone do not explain their motivations, they help provide context for the stronger emphasis on health, wellbeing and sustainable activity seen throughout the data.

This also reflects a pattern Total Fitness has explored in previous research into women and gym membership, where engagement was often shown to be more episodic. For many women, gym participation can be shaped by changes in routine, confidence, caring responsibilities, work, health, life stage and time away from structured exercise.

The returner group appears to reflect some of that complexity. These members are not new to gyms, but their relationship with membership has been interrupted. Understanding what helps them rebuild confidence and routine may therefore be particularly important.

The facilities they value reflect these priorities. Returners are more likely than either of the other groups to be attracted by the swimming pool (73%), hydrotherapy facilities (51%) and convenience of location (55%). These findings point towards a group looking for a sustainable and realistic way to reintroduce activity into their lives.

Many appear to be rebuilding habits that have been lost or disrupted. The trigger may be a change in health, a period of inactivity or a shift in personal circumstances, but the objective is similar: creating a routine that can be maintained over time.

> **For returners, the health club often plays a practical role. It provides structure, accessibility and a supportive environment in which to rebuild confidence and consistency.**

Newcomers

Taking the first step

The newcomers may be the most revealing group of all.

Unlike returners, they are not resuming an old gym habit. Unlike switchers, they are not moving directly from one provider to another. They are making an active decision to bring structured health club membership into their lives for the first time.

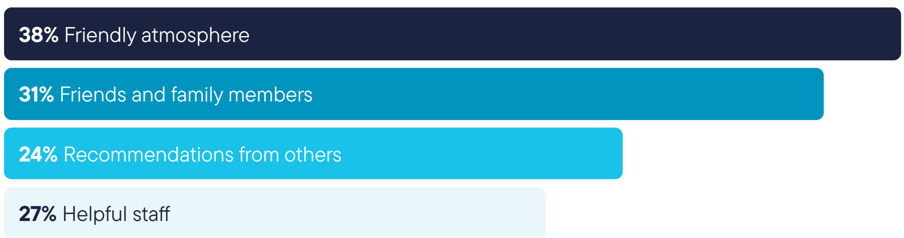
This group records some of the strongest shifts in attitudes towards fitness. Nearly nine in ten newcomers (87%) say fitness has become more important in their lives, compared with 76% of switchers and returners. They are also more likely to say fitness has become part of their lifestyle (76%) and that they are spending more on fitness and wellbeing than they were five years ago (76%).

Interestingly, **newcomers do not fit the stereotype of first-time gym members being predominantly young adults.** While they include younger members (27% are aged 24 or under, including 13% are under 17), they also **have the strongest representation of those aged 55–64** (22%) and a **substantial proportion aged 65 and over** (12%). **Women account for two thirds of the group** (66%), significantly higher than amongst switchers.

Many newcomers are not simply entering adulthood and joining a gym for the first time. Instead, they appear to be making a conscious decision to prioritise fitness across a variety of life stages.

What stands out most, however, is the way they choose a health club. Newcomers are more likely than switchers to mention a friendly atmosphere (38% vs 29%), friends and family members (31% vs 24%), recommendations from others (24% vs 19%) and helpful staff (27% vs 20%) as reasons for joining.

Switchers membership drivers



These findings show that confidence and reassurance play an important role in the decision-making process. While experienced gym users focus on facilities and equipment, newcomers appear more concerned with whether they will feel comfortable, supported and able to succeed.

The barriers they have overcome reinforce this point. Among those who had never previously joined a gym, lack of free time (43%), cost (40%) and lack of motivation (37%) were the most commonly cited reasons for not joining sooner. Their decision to become a member therefore represents more than simply choosing a club. It reflects a decision to prioritise fitness in a way they had not done before.

> **For this group, the health club is not only providing somewhere to exercise. It is helping people take their first step into structured membership, often after their wider relationship with health and wellbeing has already begun to change.**

Different journeys, different expectations

These findings highlight one of the most important considerations in the modern fitness market.

New members are not a single audience. They arrive with different histories, different motivations and different expectations of what a health club should provide.

Switchers are looking for a better experience. Returners are rebuilding routine. Newcomers are making a new commitment to fitness.

The challenge for health clubs is recognising that each journey may require a different response. The factors that attract and retain an experienced gym user are not necessarily the same as those that help a newcomer feel welcome or encourage a returning member to rebuild confidence.

As the range of options people have to choose from increases, understanding these different journeys and how to cater for them is perhaps more important than considering the demographics of members in isolation.

Section 5

What health clubs need to recognise

Great reset was not quite what many expected

Five years on from the reopening of the fitness sector, the evidence shows that the Great Reset was not quite what many expected.

Members did come back to health clubs, but not necessarily in the same way or for the same reasons. Digital fitness, home workouts and outdoor activity have become part of a broader fitness landscape, but they have not replaced the club. Younger members are building fitness differently, but the shift towards health, wellbeing and more varied routines is visible across the membership base.

Some of the assumptions made in 2021 were right. Mental wellbeing has become more important. Fitness is more closely connected to long-term health and quality of life. Members are thinking differently about what they want from a club. But other fears appear to have been overstated. The health club has not been pushed to the margins. Shared facilities remain influential. Staff, space, atmosphere and experience still matter.

> **The real change is not that health clubs have become irrelevant. It is that members are judging them differently.**

From fitness facilities to wellbeing destinations

One of the strongest themes to emerge from the research is the growing connection between fitness, health and wellbeing.

Members are now more likely to see fitness as important in their lives, that they think more about long-term health and that wellbeing plays a greater role in their day-to-day decision making. At the same time, many are engaging with fitness in more varied ways, combining gym workouts with walking, running, cycling, swimming and other activities.

> **This does not appear to have reduced the importance of health clubs. If anything, it may have reinforced their role.**

For many members, the health club is no longer simply a place to exercise. It is part of a more holistic approach to maintaining physical health, supporting mental wellbeing and creating positive routines. The popularity of facilities such as swimming pools, wellness areas and recovery spaces reflects this wider role.

The implication is that members may judge health clubs on their ability to support overall wellbeing rather than fitness alone.

Experience is becoming the advantage

Members are becoming more discerning in how they choose where to exercise.

> **Facilities remain important, but they are no longer the only consideration. Atmosphere, convenience, accessibility, opening hours, staff and the overall experience all influence decision making. Members appear willing to compare providers, assess different offers and choose the option that best fits their lifestyle.**

This is particularly notable given the wider economic backdrop.

Despite sustained pressure on household finances, relatively few members describe their membership as a luxury purchase. Most would look to reduce other spending before cancelling their membership, suggesting that value is weighed in terms of the overall experience and benefits received rather than price alone.

For the sector, this reinforces the importance of viewing the member experience as a strategic asset rather than a supporting feature.

Growth is in the changing member mix

One of the more important lessons from the research is that growth should not be understood only in terms of bringing completely new people into the gym market.

First-time gym users remain an important audience, but they represent a smaller proportion of new members than they did immediately after reopening. In 2021, 22% of new members had never previously belonged to a gym or health club. By 2026, that figure had fallen to 11%.

2021	→	2026
22% Had never previously belonged to a gym		**11%** Had never previously belonged to a gym

Over the same period, the proportion switching directly from another operator increased from 44% to 57%.

The current market is being shaped strongly by experienced gym users re-evaluating where they exercise and what they expect from a health club. That does not make the opportunity smaller. It makes it different.

Switchers are not deciding whether fitness matters. They are deciding which operator best supports the role fitness already plays in their lives. Returners are not new to gyms, but they may need help rebuilding confidence, routine and consistency. Newcomers, while smaller as a proportion of the intake, remain highly significant because their decision to join often represents a meaningful first commitment to structured fitness.

> **The implication for operators is that growth is unlikely to come from treating all new members as the same audience. The opportunity lies in understanding the different journeys people are taking into membership and designing experiences that respond to those different starting points.**

Keeping pace with a changing consumer

The central question posed by this report was whether the customer has changed since 2021.

The answer is yes.

Fitness occupies a more important place in people's lives. Expectations have broadened. Decisions have become more deliberate. First-time members continue to enter the market, but the wider story is not simply one of new audiences. It is also about experienced and returning members re-evaluating what they want from fitness, wellbeing and health club membership.

One size fits fewer members

A recurring theme throughout the report is that members are arriving with varied motivations and expectations.

> **Some are experienced gym users looking for a better environment. Others are returning after time away. Some are beginning their fitness journey for the first time.**

While these groups may share facilities, they are often looking for different things from their membership experience.

This does not mean health clubs need completely different propositions for different audiences. However, it does suggest that understanding member journeys may be becoming just as important as understanding member demographics.

The health clubs that succeed in the years ahead may be those that support members accordingly.

So, was it really a great reset?

The answer is yes, but not in the way many expected. The last five years have not produced a complete break from the past. Members have not abandoned health clubs. Digital fitness has not replaced the physical club. Growth is not being driven only by first-time gym users or by younger members alone.

Instead, the reset has been more subtle and, in many ways, more important.

Fitness now occupies a wider role in people's lives. Members are thinking more about long-term health, mental wellbeing, routine, recovery, confidence and quality of life. They are using more forms of fitness, but still value the club. They are making more considered choices, but not only on price. They are judging health clubs on space, atmosphere, facilities, staff, experience and the way membership fits into everyday life.

For health clubs, the lesson is not that everything changed overnight. It is that the meaning of membership has evolved. The member of 2026 may not be fundamentally different from the member of 2021, but their expectations, motivations and priorities have shifted.

Understanding those shifts may be one of the most important factors shaping the future success of the sector.

Behind this paper

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Sophie Lawler is CEO of Total Fitness, the UK's leading middle market health club operator. A proven transformation leader, she has driven a major turnaround of the business, delivering sustained growth, digital and product innovation, and a market-leading customer and employer brand.

With a background spanning strategy, operations and private equity-backed environments, Sophie is known for combining commercial rigour with strategic vision and people-led leadership. She played a prominent role during the COVID-19 pandemic as a national advocate for the sector, making over 300 media appearances and reaching an audience of more than 900 million. A very well-known face of the industry she uses her platform to instigate change and stimulate debate.

Alongside her CEO role, Sophie is an active non-executive and advisor, and a sought-after speaker on leadership, culture, and business transformation. She is also the creator of the Unbound leadership programmes, focused on unlocking the potential of executive women, working with women and men equally.

Kerry Curtis CCO
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Kerry Curtis is Chief Commercial Officer at Total Fitness, leading the intersection of product, brand, marketing, digital experience, insight and revenue. With a career spanning fitness, hospitality and travel, she specialises in translating customer insight into commercially successful propositions and experiences that drive loyalty, growth and long-term value.

Kerry has led some of Total Fitness' most impactful innovations, including the launch of its women-only gym concept, swim academy, digital member journeys and new product categories. Her work focuses on understanding what customers value most and turning that into differentiated products, seamless customer experiences and high performing marketing strategies that strengthen brand connection and commercial performance.

A regular speaker on consumer behaviour, brand strategy and the future of fitness, Kerry brings a distinctive perspective on building brands and customer journeys that people choose to return to and invest more in.

Sensu

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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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White paper series

The Great Reset? What really changed in fitness, wellbeing and health club membership, five years on.