

THE FITNESS BUSINESS GROWTH REPORT '26

**Innovating to Win
the Modern Member**

FOR GYM & STUDIO OWNERS



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Introduction

Foreword

Today's gym and studio owners are executing a relentless, multi-disciplinary balancing act. They are managing real estate, staff, equipment, programming, digital marketing, and member experience, often simultaneously, often alone, and always with an eye on the next opportunity. What they rarely have is data and real-life insight. Not just opinions about where the fitness industry is heading, but hard numbers and actual examples of what owners like them are actually experiencing, deciding, and building towards right now.

That is why we commissioned this research. To establish a reliable operational benchmark for 2026, we worked with an independent third-party firm to capture a focussed, high-fidelity snapshot of the industry. By surveying a representative cross-section of 662 gym and studio owners across eleven countries (40% of whom are current Wellhub partners), we bypassed surface-level trends to dig into operational realities - asking about revenue, margins, member behaviour, technology, acquisition costs, and the role of corporate wellness. The survey was designed to surface honest answers, not flattering ones.

What came back was a story of an industry with real momentum. 86% of owners grew their membership base in the past twelve months, and more than half improved their profit margins. 95% say competition has intensified over the past three years, a sign of how commercially attractive the sector has become.

In addition, it is clear that gym owners are actively analysing their business for new growth opportunities; for example, 85% have identified that at least a quarter of their facility goes unused during off-peak hours, a gap that many are looking to address with new partnerships and operational developments.

The owners capitalising on this momentum share a few things in common. They are embracing innovation, investing in technology, and opening channels that deliver members at scale and diversify their revenue streams.

We built this report to give every gym and studio owner, regardless of size or market, the data they need to make those decisions with confidence. The findings belong to the industry.

Wellhub - Grow Stronger Together



Daniel Mazini
Chief Partnerships Officer,
Wellhub

Key Findings

About This Report

The findings in this report come from an anonymous survey conducted by an independent third-party research firm between 30 March and 9 April 2026.

The survey targeted gym and studio owners across eleven countries: the United States, Brazil, the United Kingdom, Spain, Germany, Italy, Portugal, Romania, Mexico, Chile, and Argentina. A total of 662 respondents participated, with approximately 60 per country (61 in Brazil and Chile). Each country sample reflects an 80/20 split: 80% independent, single-location gyms and studios, and 20% national or multi-location operators, ensuring the findings reflect businesses of varying size within the industry.

Wellhub partnership status was not a sampling criterion. It was captured as the final survey question so as not to bias any other question in the survey. Of all respondents, 40% are current Wellhub partners and 60% are not, which allows for meaningful comparisons throughout the report.

The survey covered 70 questions across business performance, consumer trends, marketing and member acquisition, and corporate wellness partnerships. Where the data reveals meaningful differences between business types, a short segment analysis appears at the end of each chapter, grouping respondents into two categories: independents (single-location gyms and studios) and national and regional networks (multi-location gyms and studios).



Growth & Momentum

86%

of gym and studio owners report a consistently growing membership base over the past 12 months

40%

say revenue is already rising faster than costs and another 23% say the two are rising at roughly the same rate

56%

say their profit margin has increased over the past year

40%

are planning to open new locations in the next 12 months

78%

increased their marketing budget in the last 12 months

95%

say local competition has grown stronger over the past three years

Technology and Operations

65%

have invested in new technology (CRM, booking systems, automation, or AI tools) in the past 12 months

Where AI is currently being used:

used by 66% of respondents in content creation, lead management and chatbots (47%), personalised marketing (38%), data analytics (30%), media buying (10%)

63%

say digital integration (app, booking system, wearable tech) is the area where they feel most behind

64%

agree their facility must evolve into a wellness destination, incorporating recovery, social spaces, and specialised programming, to remain relevant

52%

say AI-driven tools are essential to compete effectively in member acquisition over the next 12 months

77%

agree their facility requires physical upgrades or refurbishments to remain competitive

Consumer Trends

86%

say their members have become more price-sensitive in the past 12 months

58%

have revised their pricing or contract structures in direct response to member demands

87%

agree members value flexibility in their membership more than they did 12 months ago

78%

say adding new or trending formats such as recovery, Pilates, or fitness racing is essential for growth in the next 12 months

66%

say members are actively demanding shorter contracts and more modular terms

Additional revenue streams added in the last 24 months:

personal training (86%), nutrition coaching (79%), retail or supplements (63%), recovery services (46%)

Member Acquisition and CAC

82%

say their cost to acquire a member has increased in the last 12 months

61%

say operating their business has become significantly less predictable over the last 12 months

Only 6%

have a dedicated marketing team or agency

71%

have worried about their business's financial sustainability at least occasionally in the last 12 months

87%

spend up to 50% of their weekly hours on marketing and acquisition

Channels where owners increased focus or investment in the last 12 months:

member referrals (73%), organic social and content (67%), paid social and influencer marketing (54%), email and text outreach (39%), paid search (36%)

Off-Peak Capacity

85%

say at least a quarter of their space goes unused during off-peak hours; while 19% say more than half goes unused

80%

have no strategy or only an underdeveloped one for monetising off-peak capacity



Corporate Wellness Partnerships

59%

have a more positive perception of corporate wellness platforms than they did two years ago

76%

confirm revenue from corporate wellness platforms is new income, not cannibalised from existing members

Top interests in corporate wellness platforms:

improved off-peak utilisation (69%), enhanced brand visibility (68%), access to new or inactive customer bases (63%), recurring revenue (40%)

59%

say corporate wellness platforms are extremely or very effective at helping them acquire new members

83%

agree corporate wellness platforms reach demographics they cannot reach through their own marketing

68%

say corporate wellness is very important or critical to their ongoing growth strategy



1. A Thriving,
Agile, Global
Industry

CHAPTER ONE



There is a version of the fitness industry story that focuses on pressure, rising costs, a more demanding customer, and a competitive landscape that keeps intensifying. That version is told often, and it is not entirely wrong. Costs are real. Competition is real. Consumer expectations have shifted in ways that require genuine adaptation.

But told in isolation, that story misses something important. Those pressures exist because the fitness industry has become one of the most commercially desirable sectors in the global economy. It misses the record membership numbers, the growing profit margins, and the wave of investment that gym and studio owners around the world are making right now, not in spite of the environment they operate in, but because of the opportunity they see within it.

Fitness and wellness has never been more valuable, more central to how people live, or more commercially powerful than it is right now. The chapters ahead examine how the best businesses are capitalising on this moment. But before we get to the tactics, we need to understand the foundation those tactics are built on.

It starts with the numbers.

1.1 Unprecedented Growth & Momentum

A Market That Refuses to Stand Still

For most of the past decade, the fitness industry was described as “resilient”: a sector that recovered from economic shocks faster than most, kept growing when others contracted, and held onto consumer spending even when household budgets tightened. That description remains relevant, but it no longer tells the whole story.

The global wellness economy is valued at approximately \$2 trillion today and is on track to reach \$7 trillion by 2030, growing at close to 10% per year (Porch Group Media, 2025). In the United States alone, wellness is a \$500 billion market (McKinsey, 2025a). These figures reflect something deeper than spending habits; they reflect a fundamental shift in how people think about health. Across income levels and age groups, consumers are increasingly treating their physical and mental wellbeing not as a cost to minimise when things get tight, but as an investment worth protecting regardless of what else is happening in their lives.

McKinsey’s Future of Wellness research put a number on that shift: 84% of consumers now consider wellness a top daily priority, and the vast majority maintain that spending even when economic conditions tighten (McKinsey, 2025b). The demographic driving the category forward is equally telling. Gen Z and Millennials together account for over 41% of annual wellness spending, despite representing just 36% of the total population (McKinsey, 2025b). These are consumers still early in their peak earning years, and they are already among the biggest contributors to the wellness economy. As their purchasing power grows, so does the ceiling for the fitness industry.

What Gym and Studio Owners Are Seeing in Their Own Businesses

The macro trends matter, but the most meaningful confirmation comes from the owners running the businesses at the centre of this growth story.

According to the 662 owners we surveyed across eleven countries, the picture that emerges is one of consistent, broad-based momentum. The growth signal is present across single-site and multi-site gyms and studios, across membership sizes, and across geographies.



86% of gym and studio owners reported a consistently growing membership base over the past 12 months.

That figure holds whether the business is an independent single-location studio or a multi-location network, and it holds across both established and faster-growing markets. In the United States, gym and studio membership reached an all-time high of 81 million in 2025, capping 19 consecutive quarters of visitation growth and a decade-low cancellation rate of 7.1% (HFA, 2026). Across Europe, the picture is equally strong: 75.5 million members and €39.1 billion in revenue by the end of 2025, up 9.1% year over year, with 83% of European gym and studio owners rating their current business situation as good (EuropeActive & Deloitte, 2026). In Brazil, the number of active fitness businesses nearly tripled in a decade, from 22,581 in 2015 to 62,718 by July 2025, and those businesses now operate in more than half of all Brazilian cities (Fitness Brasil Sector Overview, 4th Edition, 2025).

The financial picture follows the same pattern.



More than half (56%) of gym and studio owners say their profit margin has improved over the past year.

Sustaining and growing margins through rising real estate costs and intensifying competition is a real operational achievement. It also reflects the adaptation of the past few years: more diversified revenue, leaner operations, and smarter use of technology. In the United States, fitness businesses posted median revenue growth of 9.9% and profit margins of 23.6% (HFA, 2026).

Resource allocation is the clearest signal of where the industry stands. Confident businesses invest; uncertain ones hold back: **40% are planning to open new locations in the next year.** Hiring, signing new leases, and building out space carry real financial risk, and the willingness to take it on reflects how clearly owners see the opportunity ahead.

The obstacles are real too. When asked what stands in the way of expansion, 79% cite high operational or expansion costs as the primary barrier, followed by intensifying local competition (58%) and difficulty attracting and retaining qualified staff (42%). These are not reasons to pause (owners are expanding anyway), but they define the conditions under which that growth is happening.

The revenue picture adds one more lens.

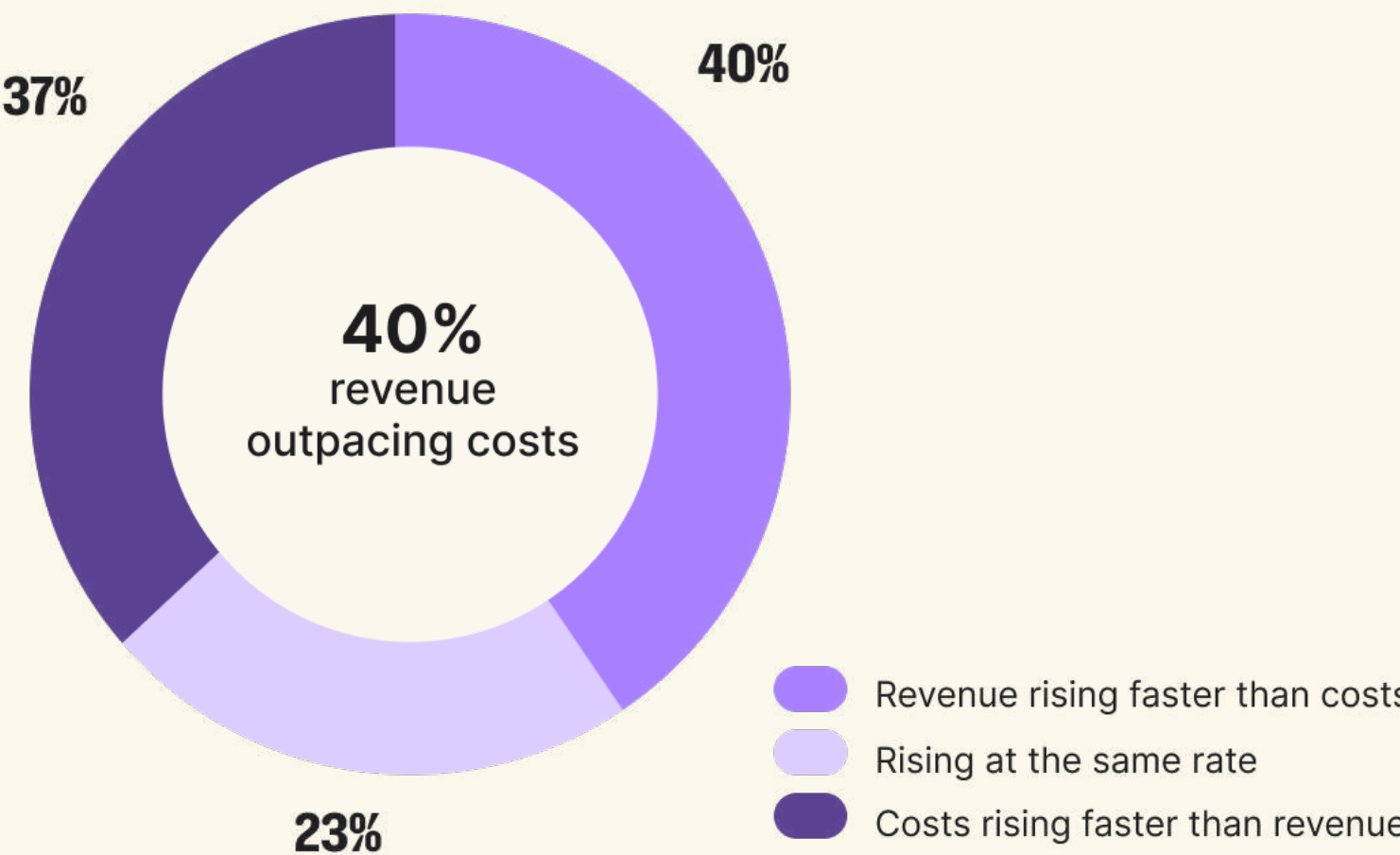


40% of gym and studio owners say revenue is already growing faster than costs, a healthy position that gives them room to invest.

Another 23% say the two are rising at roughly the same rate. The remaining 37% say costs are currently outpacing revenue, a real challenge we address directly in Chapter 3, where we look at strategies for improving acquisition economics and growing more profitably.

How have operating costs changed relative to total revenue?

Question from the Wellhub Fitness Business Growth Report 2026 survey



1.2 The Innovation Catalyst: Reinvesting to Stay Competitive

A Market Worth Competing For

Strong markets attract competition. That is how markets work, in fitness and everywhere else. When the opportunity is large and clearly visible, new entrants arrive, existing players expand, and the competitive landscape becomes more crowded and more demanding. The fitness industry is in exactly that position right now.

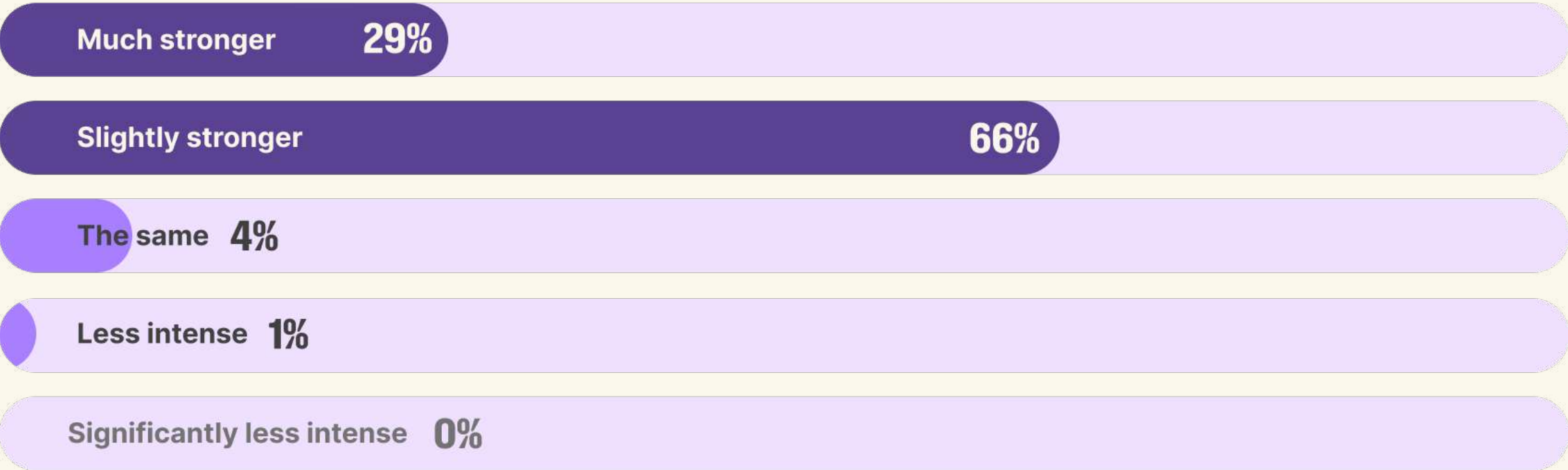


For most, that shows up in the daily fight for new members and in the pressure to hold onto existing ones. For about 29% of gyms and studio owners, the increase in competition has been significant rather than gradual.



Compared to 3 years ago, competition in your local market is:

Question from the Wellhub Fitness Business Growth Report 2026 survey



More competitors means more people believe the market is worth entering. High Value, Low Cost gyms are opening to meet strong demand for affordable options: in the United States, low-cost chains posted their strongest visitation growth on record in early 2025, with visits up 3.8% year over year (HFA, 2025). Digital platforms are expanding because members who combine in-facility and digital training do 67% more workouts per week than those who train in-facility only (Les Mills, 2024). Each is a different bet on the same thesis: people will keep investing in fitness.

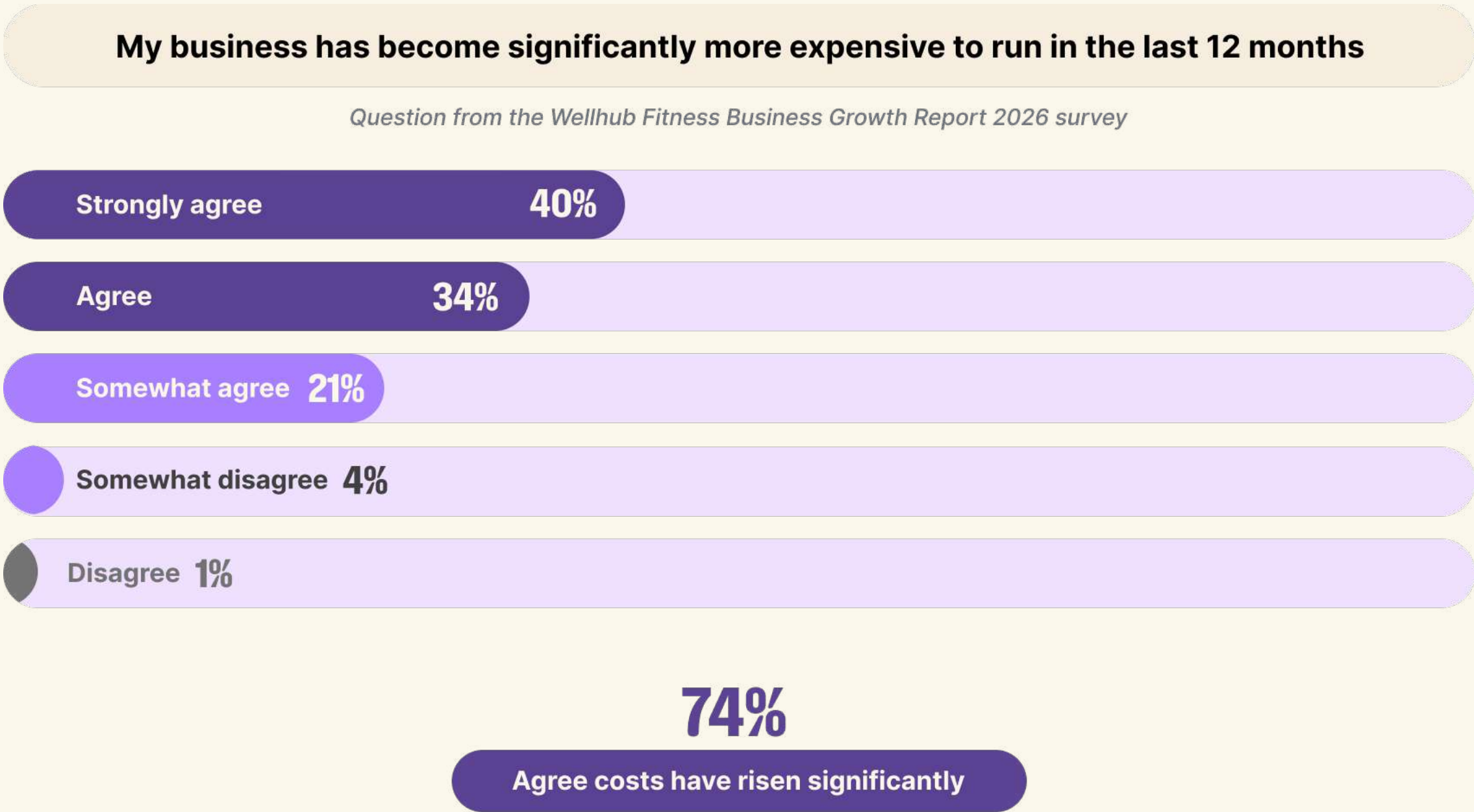
Successful owners and operators are no longer seeking to simply protect what they already have; instead they are actively building a business that is hard to compete with.

Reinvesting Through Cost Pressure

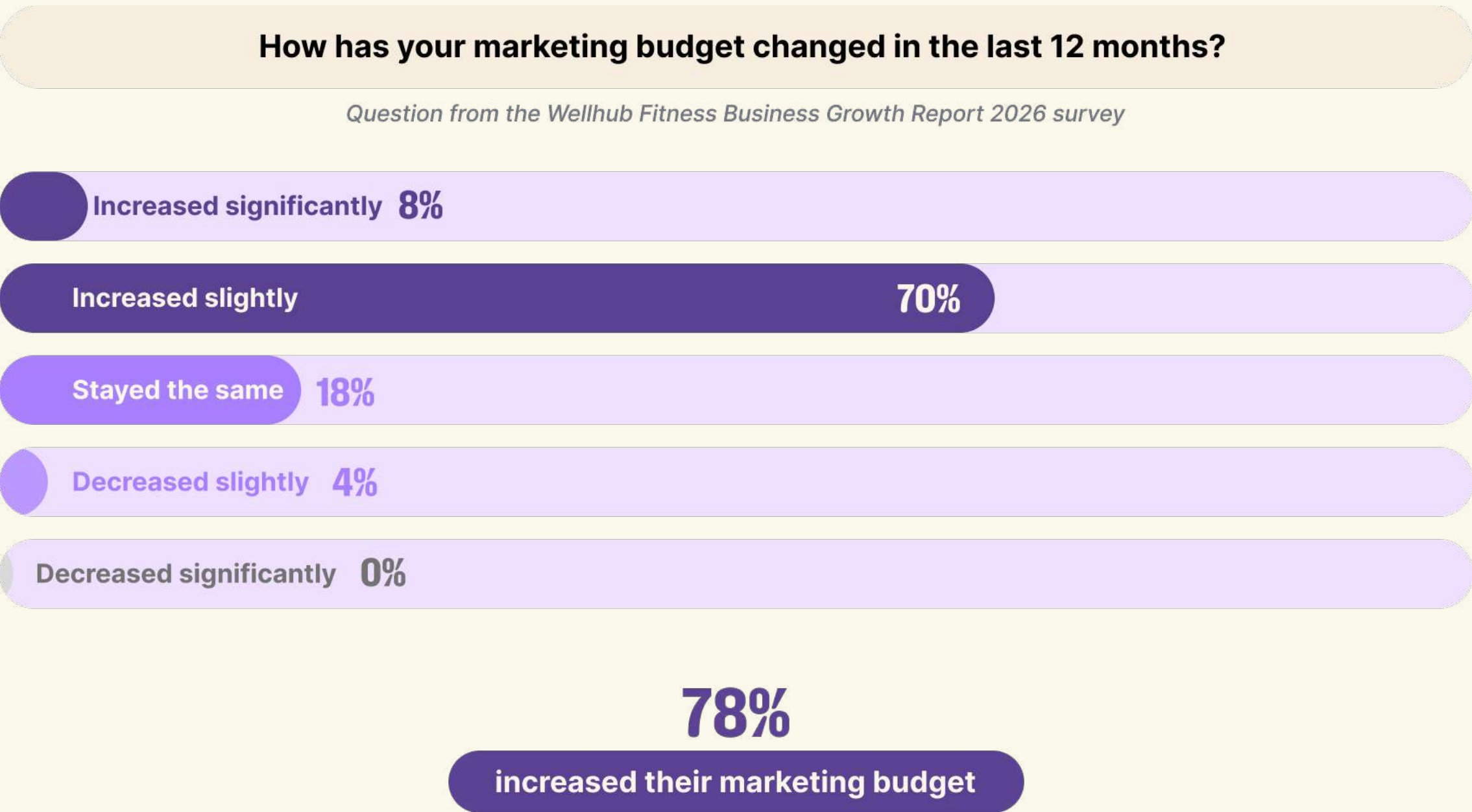
Rising costs are real.

Seventy-four per cent of gym and studio owners say running their business has become significantly more expensive over the past 12 months, citing higher overhead and steeper member-acquisition costs.

If not managed effectively, these pressures translate directly into tighter margins, harder pricing and staffing decisions, and less tolerance for inefficiency.



Marketing spend is one example of where that cost pressure is showing up. 78% of gym and studio owners increased their marketing budget in the last 12 months yet acquisition costs have continued to climb. Chapter 3 examines why, and what owners are doing about it.



However, when the majority of survey respondents report growing membership and improving margins, the narrative of an industry under siege starts to break down. These businesses are not surviving despite the pressure. They are outperforming because of how they have responded to it. Many are spending more in specific areas, such as technology and automation, precisely because doing so lowers labour costs or lifts conversion elsewhere.

In the past 12 months,



65%

of gym and studio owners invested in new technology, including CRM platforms, booking and scheduling systems, automation tools, and AI-powered software.

These are operational upgrades that reduce the manual labour behind member communication, prospect member follow-up, billing, and class scheduling. Notably, **63% of owners say digital integration is the area where they feel most behind**, a gap that applies across independent and multi-location gyms and studios alike. The returns on integration go beyond operational efficiency. Based on Wellhub internal data, gyms and studios that integrate with the platform see check-ins and active users climb. Facilities that require members to check in on arrival, mostly full-service gyms and studios, saw a 30 percentage point increase. Facilities that require bookings, mostly class-based studios, saw check-ins rise 23 percentage points and active users rise 21 percentage points.

This investment wave is happening at a moment when the technology available to fitness businesses is advancing rapidly and becoming much more accessible. The AI fitness market, valued at \$10.68 billion in 2025, is projected to reach \$57.80 billion by 2035 (InsightAce Analytic, 2025). Capabilities that a few years ago required enterprise-level budgets and dedicated IT teams (i.e. predictive analytics, automated personalised member communication, and real-time capacity monitoring) are now available through purpose-built fitness software at a price point that makes sense even for a single-site studio. The barrier between “what large chains can do” and “what independent gyms can do” is shrinking fast, a shift we examine in detail in Section 3.2.

Automated member communication systems are replacing hours of manual follow-up calls and emails with consistent, well-timed outreach that converts prospective members at higher rates.

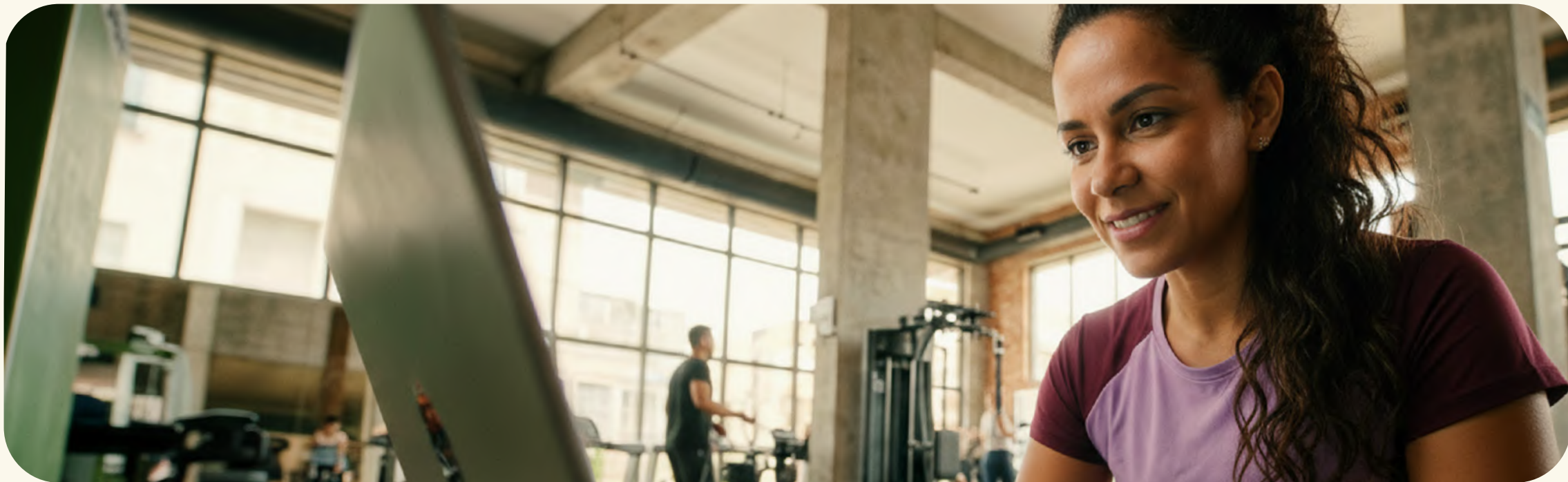
CRM platforms built specifically for fitness give owners visibility into where their best members come from, what keeps them engaged, and what behavioural patterns tend to precede a cancellation.



1.3 A closer look: how the picture shifts by business type

The headline growth figures hold across the industry, but the underlying dynamics differ by business type. Independents are more likely to be in a healthy revenue position: 44% say revenue is currently rising faster than costs, compared to 22% of national and regional networks. Networks, by contrast, are more likely to be feeling cost pressure: 54% say costs are outpacing revenue, versus 31% of independents. Margin trends follow the same pattern, 54% of independents say their profit margin has improved over the past year, compared to 38% of networks.

Where networks have a clear edge is expansion confidence. Seventy per cent of national and regional networks are planning to open new locations in the next 12 months, more than double the rate among independents at 33%. That gap reflects the structural difference between the two groups: networks have the capital infrastructure and operational systems to move faster on growth, while independents are more likely to be focused on optimising the business they already have.



Independents vs national and regional networks

Question from the Wellhub Fitness Business Growth Report 2026 survey

% of owners where revenue is rising faster than costs

Independents 44%

Networks 22%

% of owners whose profit margin improved this year

Independents 54%

Networks 38%

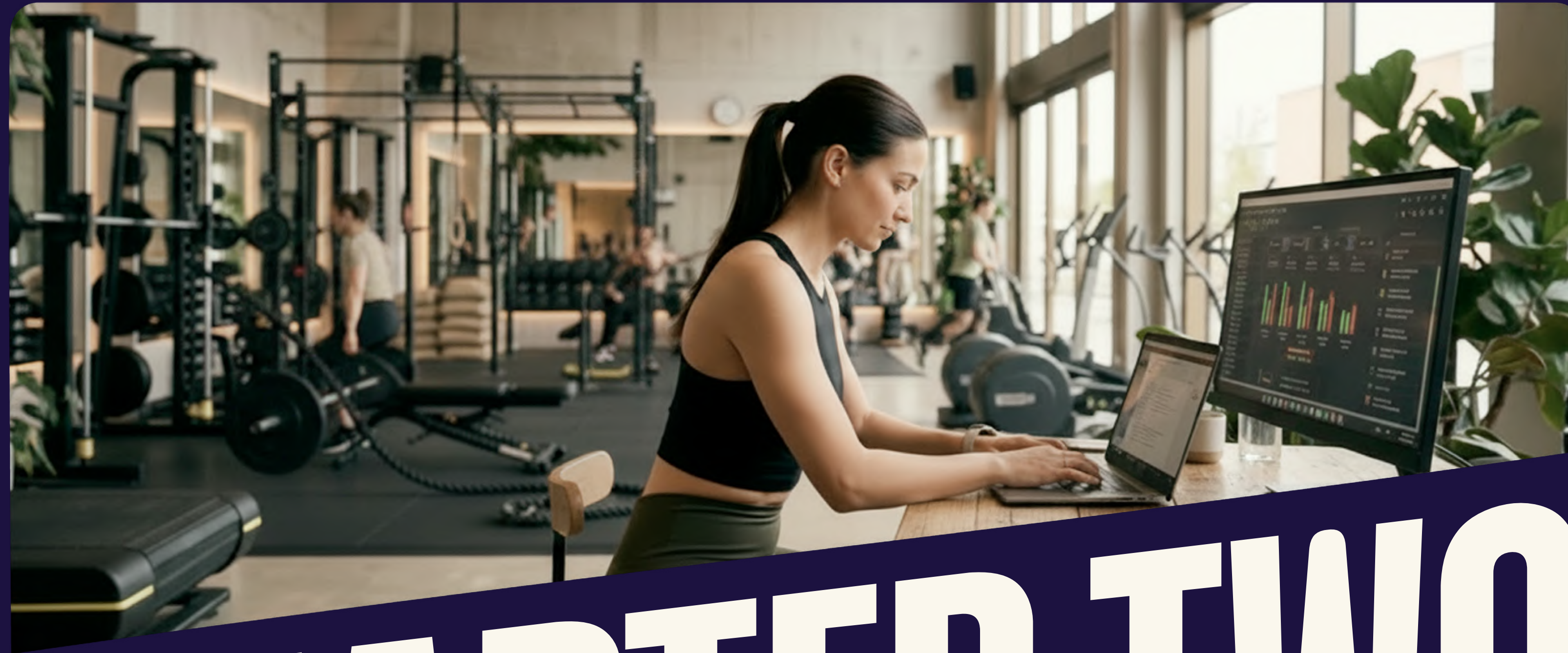
% of owners planning to open new locations in the next 12 months

Independents 33%

Networks 70%

Independents National and regional networks

Reminder: This survey was conducted by an external third-party research firm. Wellhub partnerships status was not a sampling criterion: 40% are Wellhub partners, 60% are not. Where segment differences are noted, respondents are grouped into two categories: independents (single-location gyms and studios) and national and regional networks (multi-location gyms and studios).



CHAPTER TWO

2. The Modern Wellness Consumer: What Members Want Now

The membership growth and margin gains in Chapter 1 belong to gyms and studios that have kept pace with members who want more from a fitness facility than ever before. The chapters ahead examine what those members actually want, and how owners are responding.

2.1 The Holistic Shift: From “Gym-Goer” to “Wellness Consumer”

Members are arriving at gyms and studios with a wider set of goals than they had five years ago. Mental health, recovery, and longevity sit alongside physical performance as reasons people train, and those requirements are strongly influencing where they choose to stay active.

Seventy-four per cent of consumers globally say prioritising mental health is very or extremely important to them, and motivation to exercise specifically for mental health has grown 29% since 2021 (Les Mills 2026 Global Fitness Report). ACSM lists both “Exercise for Mental Health” and “Recovery” among its top global fitness industry trends (ACSM, 2024).

Regular gym users are associated with a 30% reduction in clinical depression symptoms, a 35% reduction in cardiovascular disease risk with two or more strength sessions per week, and a 41% reduction in overall healthcare costs (Gitnux, 2026).

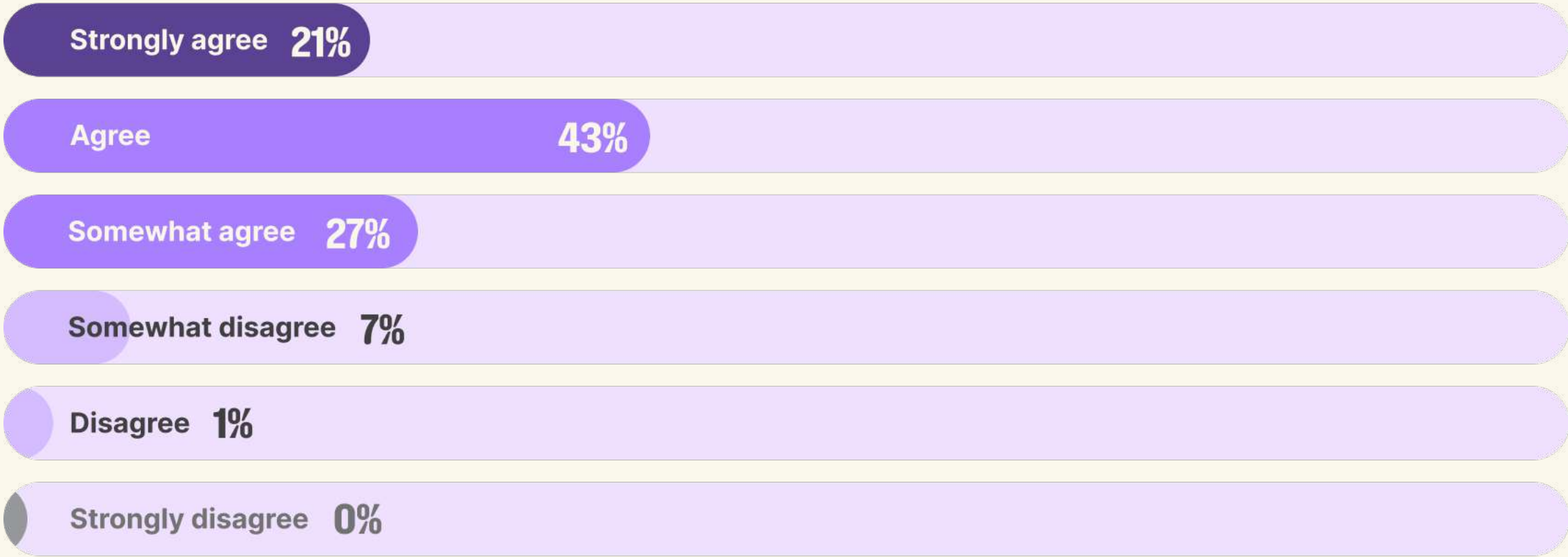
In the US alone, 82 million people are actively setting fitness goals in 2026, with strength training (50%), improving mobility and flexibility (48%), and improving mental health (46%) as the top three priorities. 86% say access to gyms and studios is important to achieving those goals (HFA, 2026).

Sixty-four per cent of gym and studio owners in our survey agree their facility must evolve into a wellness destination, incorporating recovery spaces, social areas, and specialised programming, to remain relevant.



"The traditional gym model is no longer enough — our facility must evolve into a wellness destination (recovery, social spaces, specialised programming) to remain relevant."

Question from the Wellhub Fitness Business Growth Report 2026 survey



64%

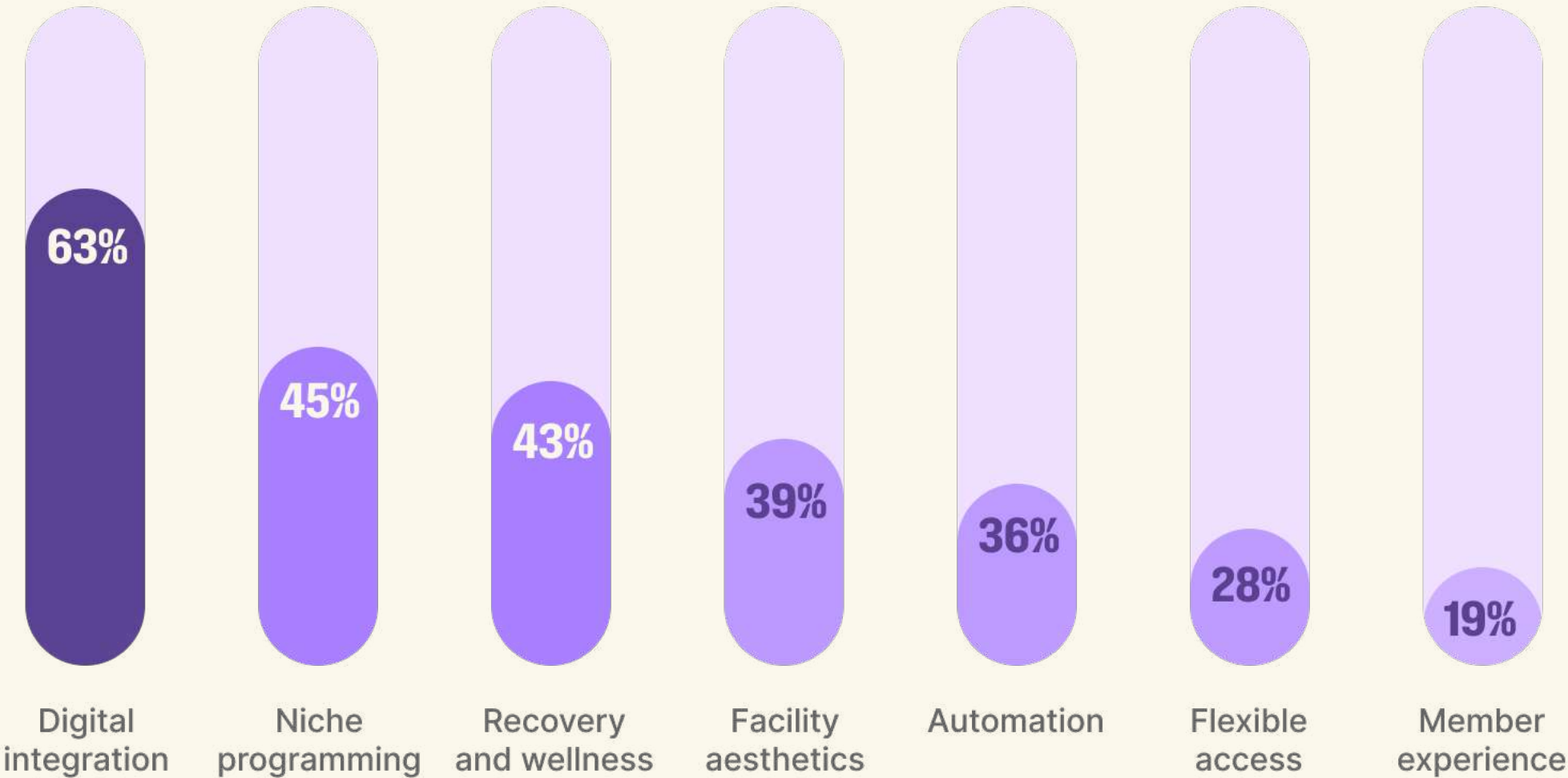
agree or strongly agree

A further 77% say their facility requires physical upgrades or refurbishments to remain competitive, and 78% say adding new or trending formats such as recovery, Pilates, or fitness racing is essential for their growth in the next 12 months. Across independent gyms and multi-location networks alike, owners say their facility is not yet where it needs to be.

When asked where they feel most behind, digital integration leads the list, cited by 63% of owners, followed by niche programming (45%), recovery and wellness amenities (43%), and facility aesthetics (39%).

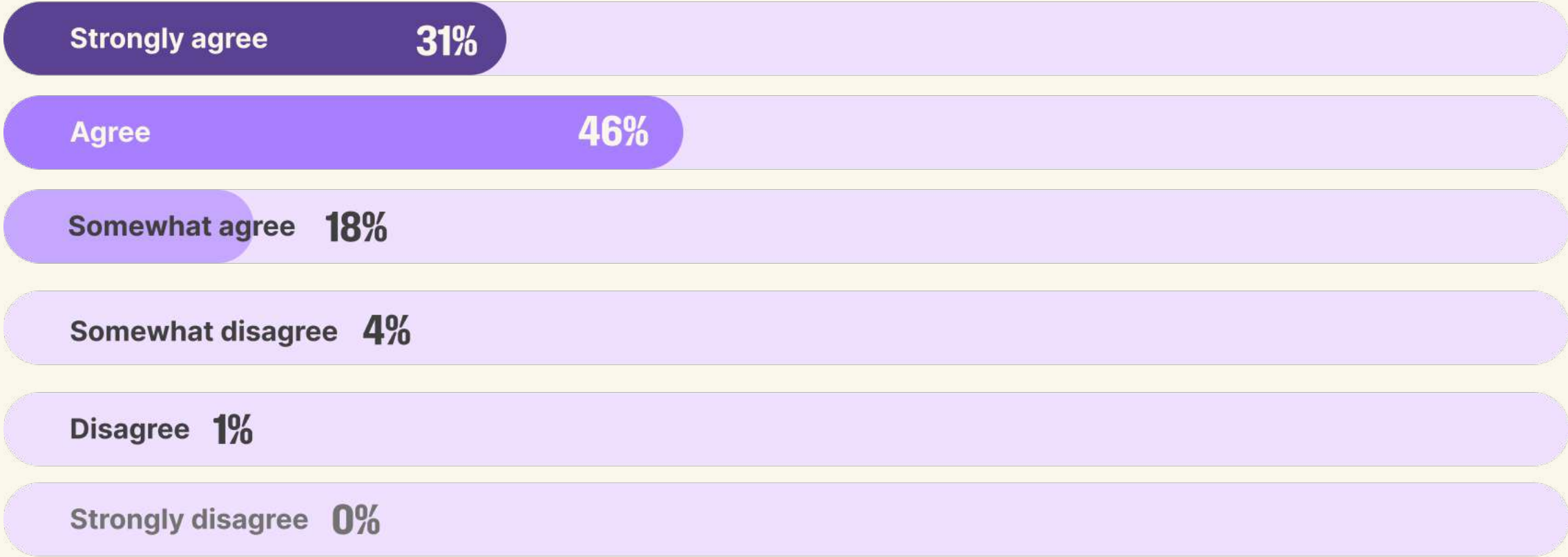
Where do you feel most behind the competition?

Question from the Wellhub Fitness Business Growth Report 2026 survey



“Our facility requires physical upgrades or facility refurbishments to remain competitive in the current market”

Question from the Wellhub Fitness Business Growth Report 2026 survey



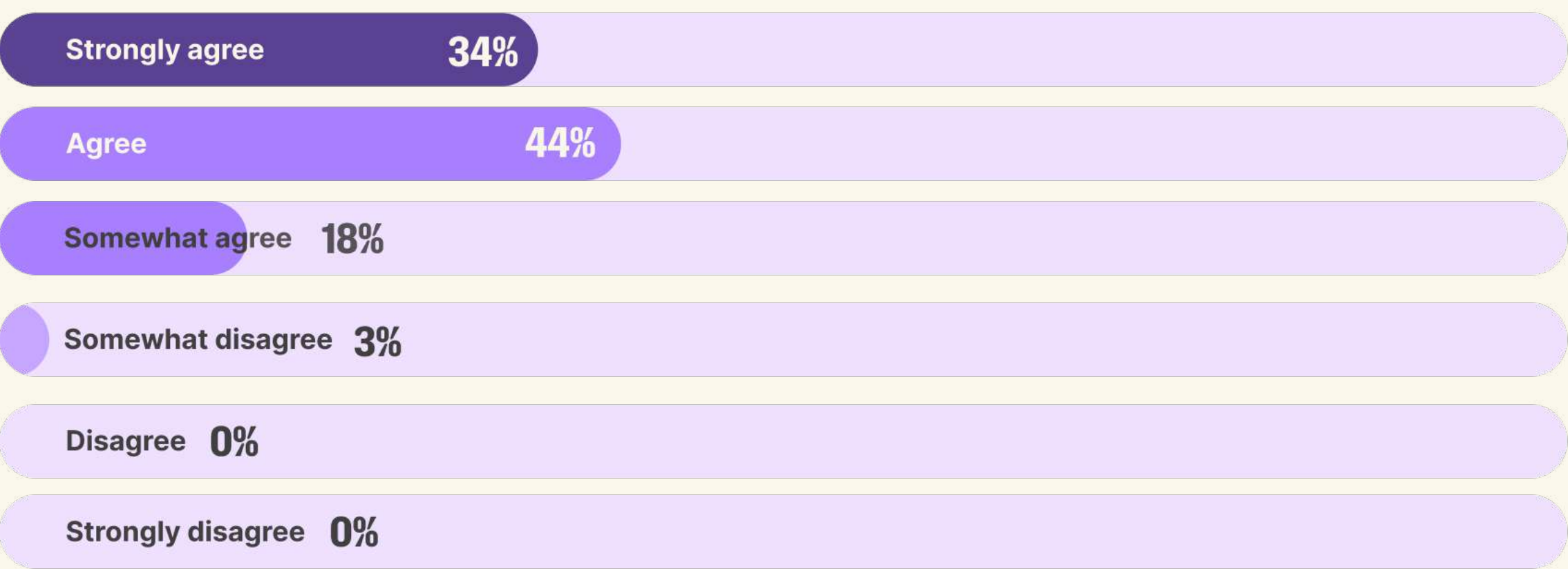
77%

agree or strongly agree

The reasons people show up have expanded too. When visiting gyms and studios, 40% of people say they go to care for their health, while 31% go specifically to socialise or connect with others (Wellhub Work Life Wellness Report). That social pull is significant: more than half of active consumers (57%) say social interaction and connection are among the main reasons they join a

“Adding new or trending fitness formats (e.g., Recovery, Pilates, Hyrox/Functional or Strength Training) is essential for our growth in the next 12 months.”

Question from the Wellhub Fitness Business Growth Report 2026 survey



78%

agree or strongly agree

fitness community (ABC Fitness, Fall 2025). The gym is increasingly functioning as a third place, alongside home and work, where people build routines and relationships at the same time. For owners, that shift has real implications: a member who comes for the community is harder to lose than one who comes only for equipment.

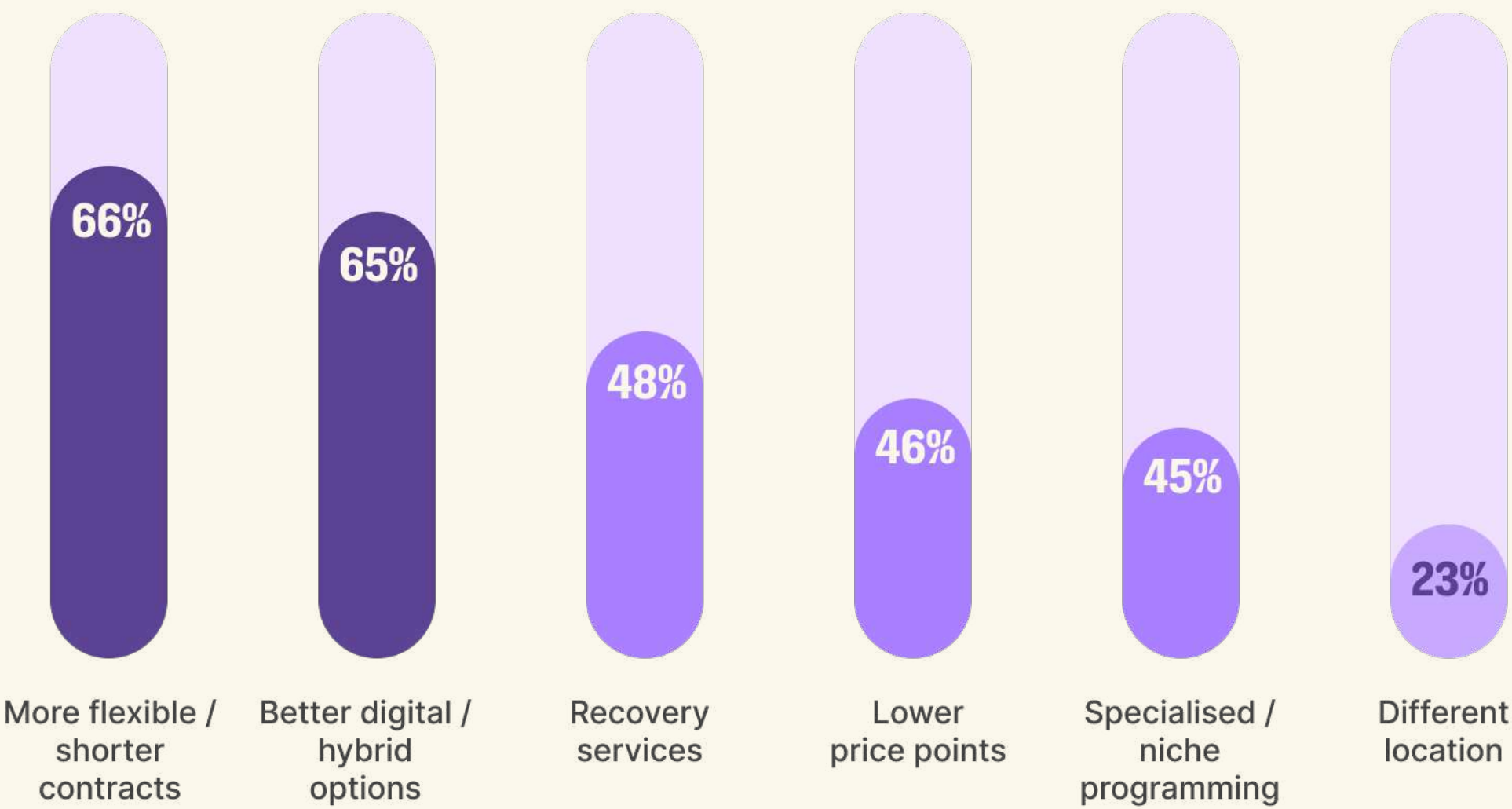
2.2 The New Member: Providing Flexible, Tailored Experiences, In-Facility and Digitally

Eighty-six per cent of gym and studio owners say their members have become more price-sensitive over the past 12 months. But when those same owners describe what members are actually asking for, a more specific picture emerges. The top two demands are more flexible or shorter contracts (66%) and better digital or hybrid options (65%). Lower prices came fourth, at 46%. Members aren't primarily asking for less. They're asking for less lock-in and more ways to stay active.



What new demands are you hearing from members?

Question from the Wellhub Fitness Business Growth Report 2026 survey



Eighty-seven per cent of owners agree members value flexibility in their membership more than they did 12 months ago, and 66% say members are pushing for shorter contracts and more modular terms.

This likely reflects a broader shift in how consumers approach subscriptions generally. Across streaming, software, and other services, flexibility to pause or cancel has become a baseline expectation, and a 12-month gym contract is increasingly measured against that standard.

The data is consistent across business types: whether a national multi-location gym or an independent studio, flexible and shorter contracts rank as the top member demand.

A growing share of fitness consumers now combine gym or studio visits with home or digital workouts as part of a regular routine, and those members train more, not less: hybrid exercisers report better health outcomes than those who train in a single format alone. For owners, this means the competition for a member's time and wallet is no longer just the gym down the street. It includes every app, studio, and on-demand platform that members already use.

For owners, the competition for a member's time and wallet is no longer just the gym down the street. It includes every app, studio, and on-demand platform that members already use.

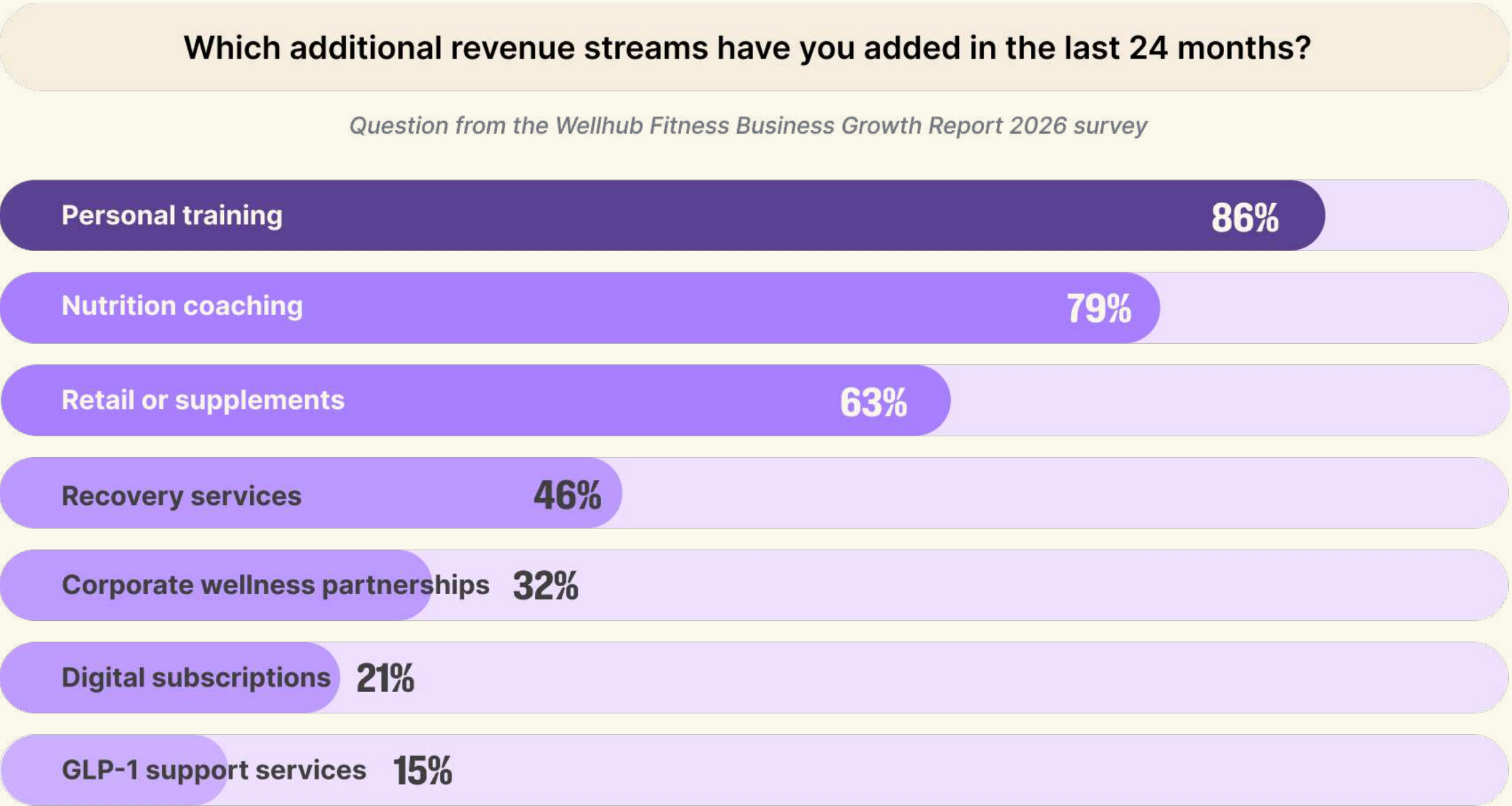


2.3 The Operational Pivot: Expanding the Business Model

The picture that emerges from sections 2.1 and 2.2 is of a member who wants more: more formats, more flexibility, more services beyond a gym floor and a membership card. Owners have heard that signal clearly. Rather than defending the traditional model, the majority are expanding around it.

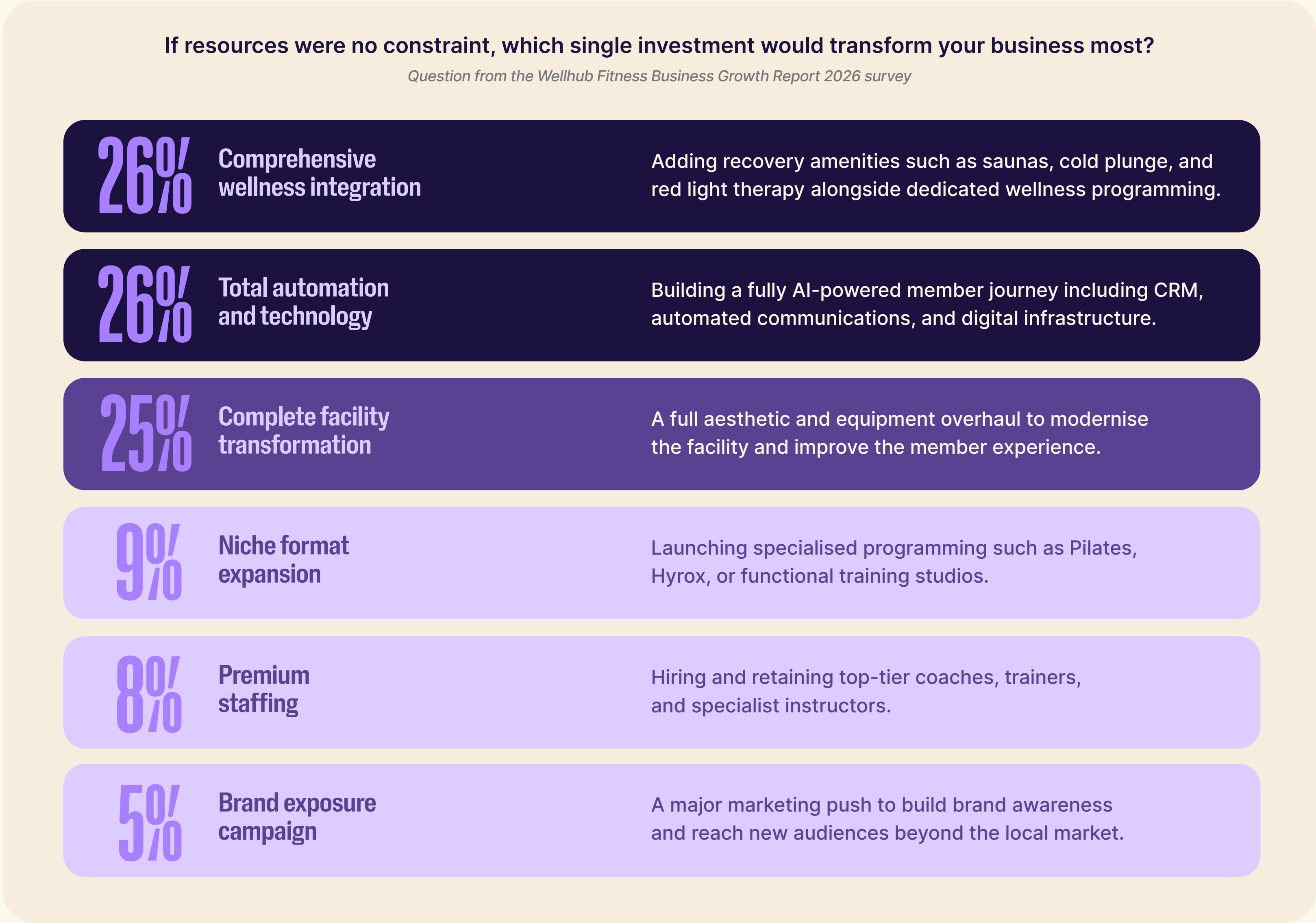
Seventy-eight per cent of gym and studio owners say adding new or trending fitness formats such as Pilates and recovery facilities or infrastructure for specific race or competition formats is essential for their growth in the next 12 months.

That conviction is already translating into action. In the last 24 months, owners have diversified with new revenue streams: 86% added personal training, 79% added nutrition coaching, 63% added retail or supplements, and 46% added recovery services. A further 32% added corporate wellness partnerships and 15% added dedicated GLP-1 support services, reflecting how broadly member needs are shifting beyond what a traditional gym membership ever covered.



Coaching is where the revenue opportunity is sharpest. HFA data shows the share of US members participating in small group training grew from 18.4% in 2021 to 34.7% in 2025, while personal training participation climbed to 26.2% over the same period (HFA, 2026). The trend is consistent globally: the Les Mills 2026 Global Fitness Report, drawing on data from 13 countries, found that participation in strength-based group training classes rose from 30% in 2018 to 36% in 2025 (Les Mills, 2026). Members are paying more for guided, expert-led experiences, and gyms and studios that have built out those verticals are capturing that spend. Members are paying more for guided, expert-led experiences, and gyms and studios that have built out those verticals over the past two years are capturing that spend.

When asked what single investment would have the most transformative impact on their business if resources were no constraint, owners were split almost evenly across three options: comprehensive wellness integration (26%), total automation and tech (26%), and a complete facility transformation (25%). The ambition is clear, and it points in the same direction across business types.



The owners doing this well are not simply adding services. They are redefining what their business is: less a place to work out, and more a destination for how people want to look after themselves.

2.4 A closer look: how the picture shifts by business type

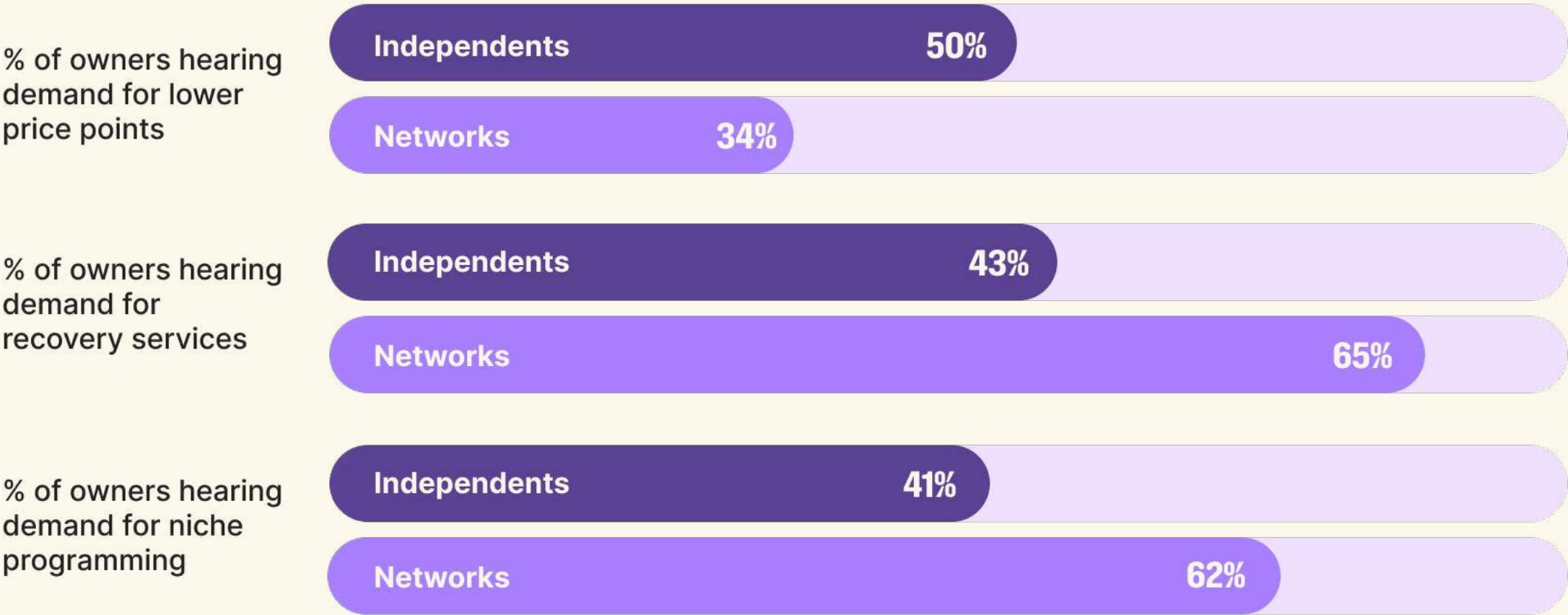
Gym owners are hearing differing member demands, depending on the specific business type. Larger networks seem to be under more pressure to expand their premium offering: 65% say members are demanding recovery services and 62% are hearing calls for more niche programming such as Pilates and fitness racing. Among independents those figures sit at 43% and 41% respectively. Independents, on the other hand, face sharper price sensitivity: 50% say members are asking for lower price points, compared to 34% of networks. And 28% of independent owners say members are asking about opening a new location, compared to just 4% of networks.

Where owners feel behind also depends on who you ask. Networks cite recovery and wellness amenities as their biggest gap (57%). Independents point to automation, with 40% saying they’re still doing manually what competitors have already automated, nearly double the rate of networks (23%). The urgency is the same; the problem is not.

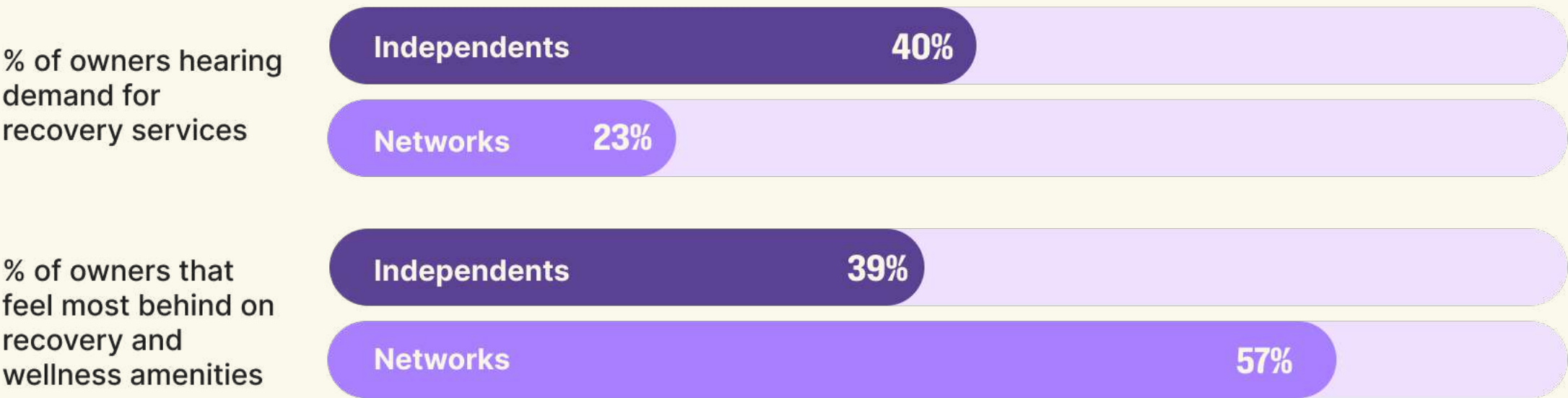
Independents vs national and regional networks

Question from the Wellhub Fitness Business Growth Report 2026 survey

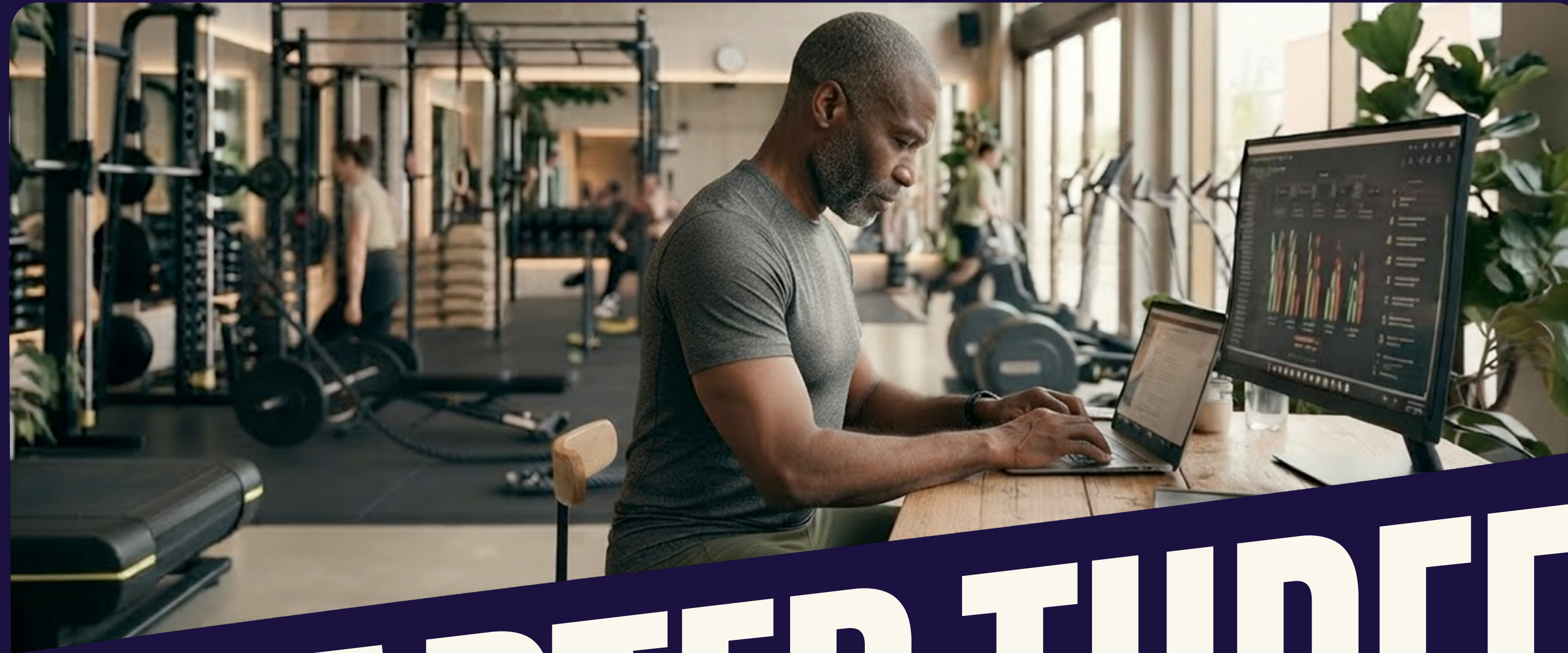
WHAT MEMBERS ARE DEMANDING



WHERE THEY FEEL MOST BEHIND



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3. Building a Resilient, Omnichannel Acquisition Engine

CHAPTER THREE



The growth story in Chapters 1 and 2 comes with a pressure point running underneath it. Memberships are up, formats are expanding, and owners are investing. But getting new members through the door is getting harder and more expensive, as the traditional playbook for doing so begins to show its limits. This chapter looks at how successful owners are responding: through smarter channel investment, technology, and a B2B opportunity that is reshaping how the most forward-thinking gyms and studios think about acquisition entirely.

3.1 The CAC Crisis: When the Traditional Playbook Breaks Down

Eighty-two per cent of gym and studio owners say their cost to acquire a member has increased in the last 12 months. That figure alone is significant. But the context around it makes it sharper. Only 6% of owners have a dedicated marketing team or agency, yet 87% are spending up to half their weekly working hours on marketing and acquisition. And 88% describe their digital marketing expertise as only proficient or basic, meaning most owners are running expensive channels without the technical depth to optimise them.

The cost of growth — last 12 months

82%

say their cost to acquire a new member has increased in the last 12 months.

61%

say their business has become significantly less predictable over the same period.

71%

have worried about their business's financial sustainability at least occasionally.

The financial consequences are real. **Sixty-one per cent say their business has become significantly less predictable over the past 12 months, and 71% have worried about financial**

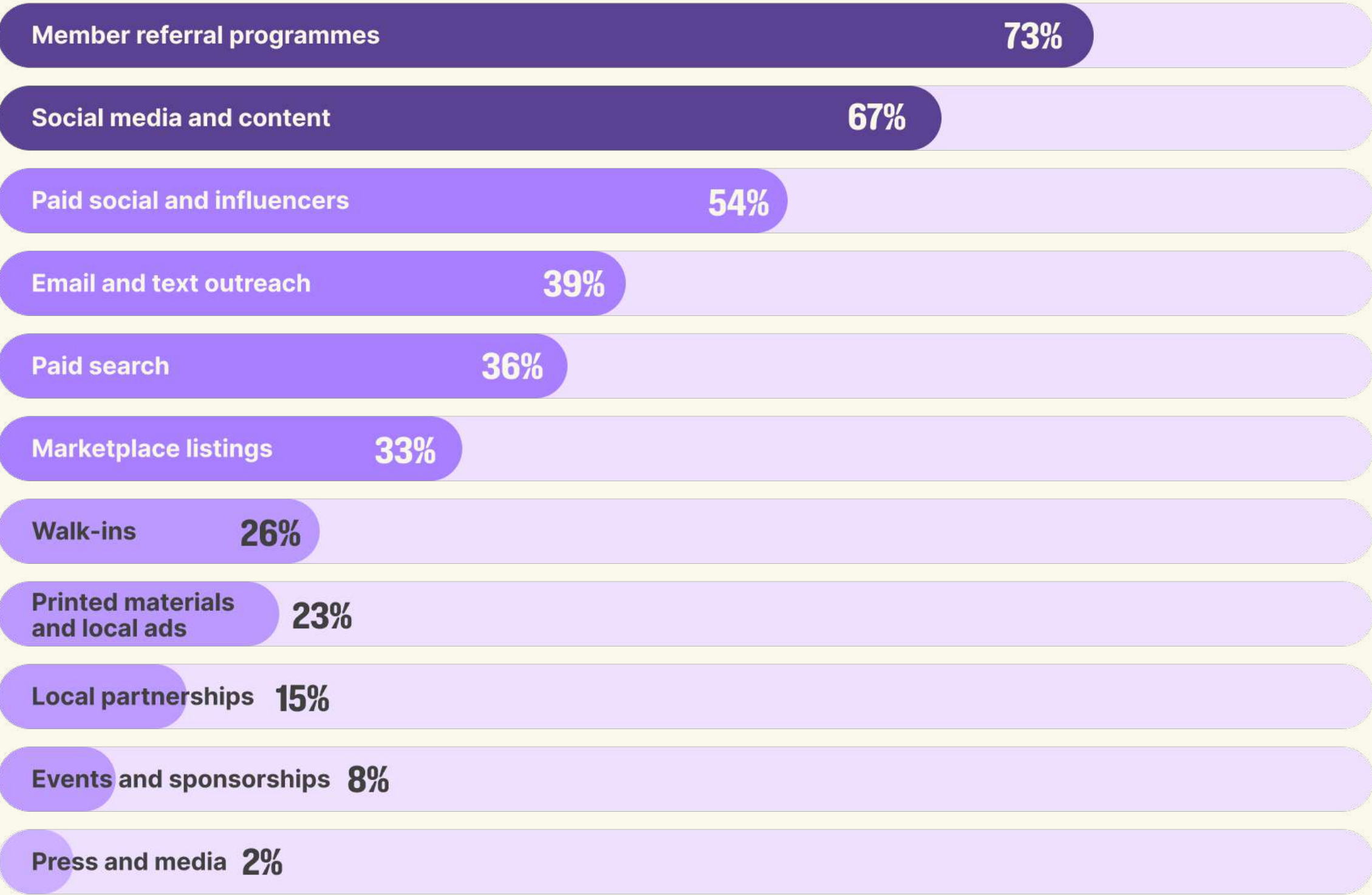
sustainability at least occasionally in the same period. Rising acquisition costs, without the expertise or infrastructure to manage them efficiently, translate directly into financial uncertainty.

Owners are not standing still. Investment is shifting toward channels with better organic returns: member referral programmes saw the biggest increase over the past 12 months (73%), followed by social media and content marketing (67%). Referrals lead because they remain the highest-converting channel at the lowest marginal cost. Paid channels also saw increased investment, with paid social and influencer marketing (54%), email and text outreach (39%), and paid search (36%) all gaining ground. **Eighty-one per cent of owners track the ROI of each acquisition channel, so this shift is deliberate, not accidental.**



In the last 12 months, which acquisition channels have you specifically increased your focus or investment in?

Question from the Wellhub Fitness Business Growth Report 2026 survey



But investing more in the same channels, even better ones, only goes so far when the underlying cost pressure keeps rising.



3.2 The Technology Response: AI and automation



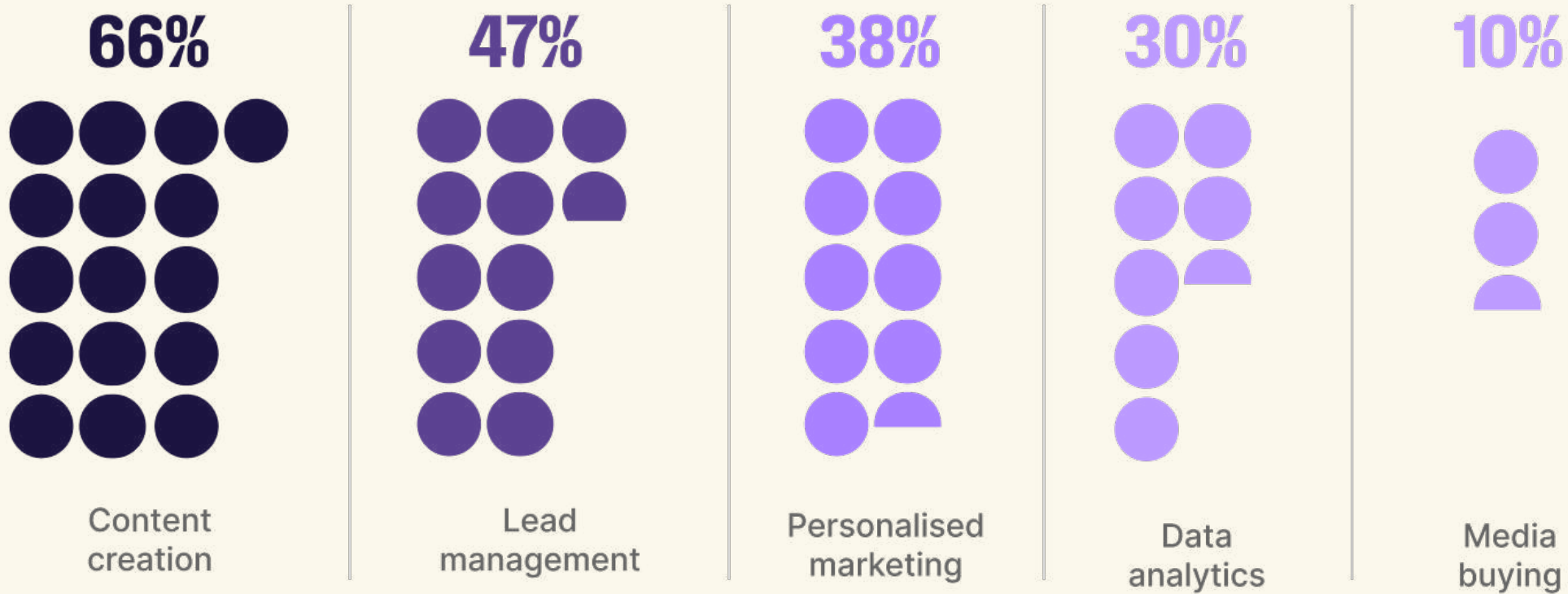
52%

of owners say AI-driven tools are essential to compete effectively in member acquisition over the next 12 months.

The most common AI use case is content creation, adopted by 66% of operators, followed by lead management including chatbots and automated follow-up (47%), personalised marketing such as automated emails or SMS (38%), data analytics (30%), and media buying (10%).

In which areas of your strategy are you currently using AI tools?

Question from the Wellhub Fitness Business Growth Report 2026 survey



The 65% of owners who invested in new technology in the past 12 months are ahead of the curve here. CRM platforms built specifically for fitness give owners visibility into where their best members come from, what keeps them engaged, and what behavioural patterns precede a cancellation- the kind of insight that previously required hiring consultants or building internal analytics teams.

The tools that once gave large chains a structural advantage over independents are now within reach for a single-site studio, and owners who move early will feel that in their acquisition numbers.

3.3 A closer look: how the picture shifts by business type

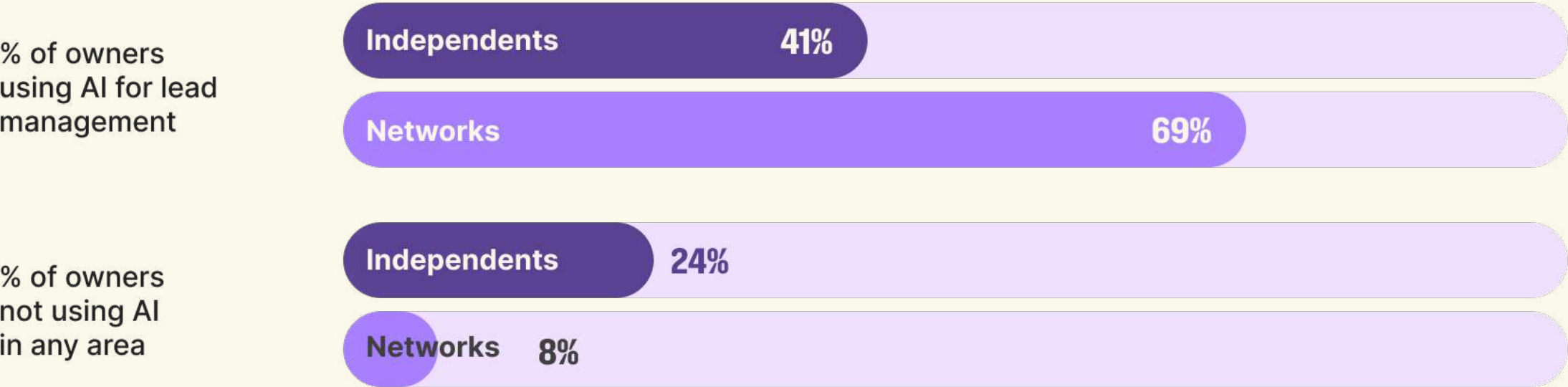
On the surface, AI adoption looks similar across business types — both independents and networks use AI for content creation at nearly identical rates (65% vs. 68%). But that similarity masks a deeper divide. Networks are far ahead in lead management, with 69% using chatbots or automated follow-up tools compared to 41% of independents. And one in four (24%) independent owners do not use AI at all, versus just 8% of networks.

The infrastructure gap helps explain why. Networks are more likely to have dedicated acquisition staff (87% vs. 73%) and digitally proficient teams, with 60% rating their expertise as strong compared to 44% of independents who describe theirs as basic. That gap has real consequences: without the technical depth to evaluate new tools, adoption stalls. AI is no exception.

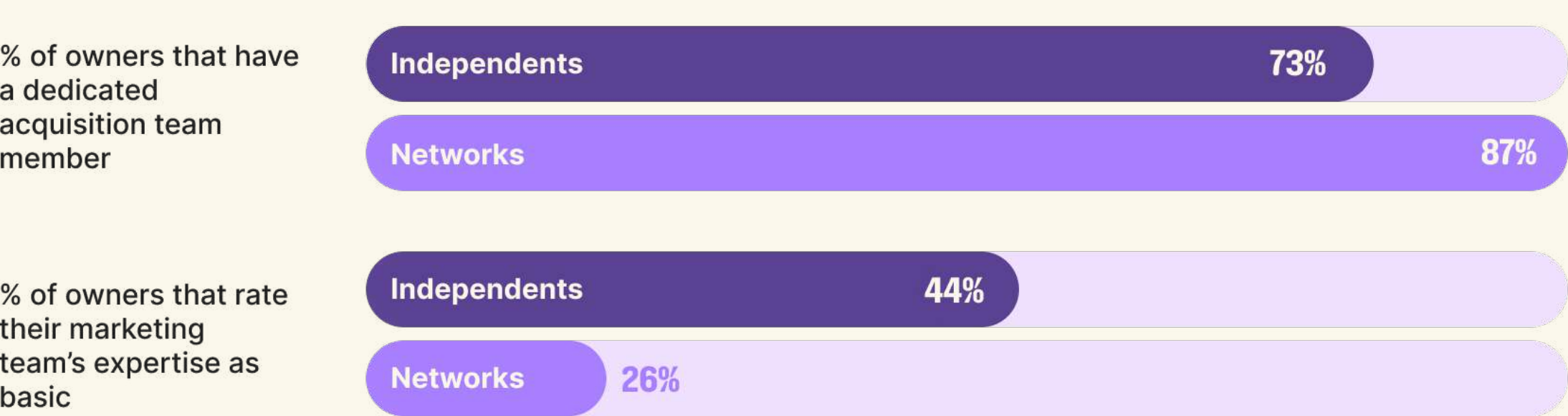
Independents vs national and regional networks

Question from the Wellhub Fitness Business Growth Report 2026 survey

AI ADOPTION



MARKETING INFRASTRUCTURE



Reminder: This survey was conducted by an external third-party research firm. Wellhub partnerships status was not a sampling criterion: 40% are Wellhub partners, 60% are not. Where segment differences are noted, respondents are grouped into two categories: independents (single-location gyms and studios) and national and regional networks (multi-location gyms and studios).

Technology investment addresses the efficiency side of the acquisition problem. But it does not address the supply side: a growing member base still requires a growing pool of potential members to draw from. That is where corporate wellness changes the equation.



3.4 The Corporate Wellness Opportunity

For many gym and studio owners, member acquisition is something they run entirely on their own. They build the content, manage the ads, and chase the referrals. Corporate wellness partnerships introduce a different dynamic: employers invest in their employees' fitness, and the platform promotes the gym to a pool of new members it didn't have to go looking for.



83%

of owners who have partnered with a corporate wellness platform confirm it allows them to reach demographics they cannot reach through their own marketing.

Seventy-six per cent say the revenue it generates is new income, not cannibalised from existing members. An independent financial impact study conducted by EY-Parthenon on behalf of Wellhub, covering 813 gym units across Brazil, found that gyms partnering with Wellhub saw average EBITDA growth of 32.1%, with operating margin improving by 3.3 percentage points (EY-Parthenon, 2026). The channel does not compete with what owners are already doing. It adds to it.

That difference is driving a significant shift in how owners think about these partnerships. **Fifty-nine per cent now have a more positive view of corporate wellness platforms than two years ago**, and every single respondent in our survey is aware of successful corporate wellness partnerships in their industry. The question is no longer whether it works. It is how much it can do.

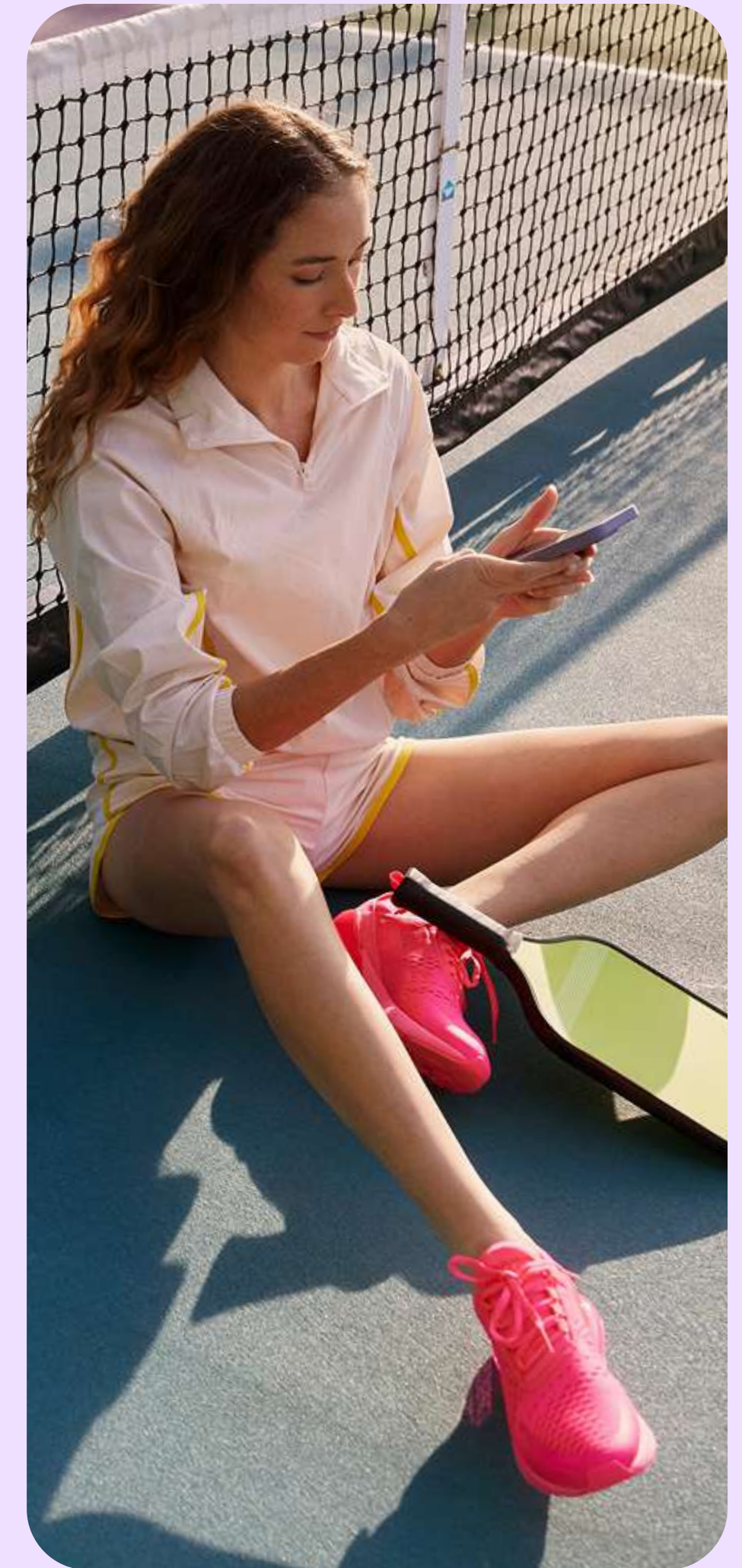
When owners describe what they want from these partnerships, four benefits stand out.



Access to members you cannot reach alone

Sixty-three per cent cite access to a new or inactive customer base as a primary draw.

These are people who are not responding to paid ads, not walking past the front door, and not coming through a referral. A corporate wellness platform reaches them through their employer, before they have decided to look for a gym at all. **Fifty-nine per cent say corporate wellness platforms are extremely or very effective at helping them acquire new members**, and **68% say corporate wellness is very important or critical to their ongoing growth strategy.**

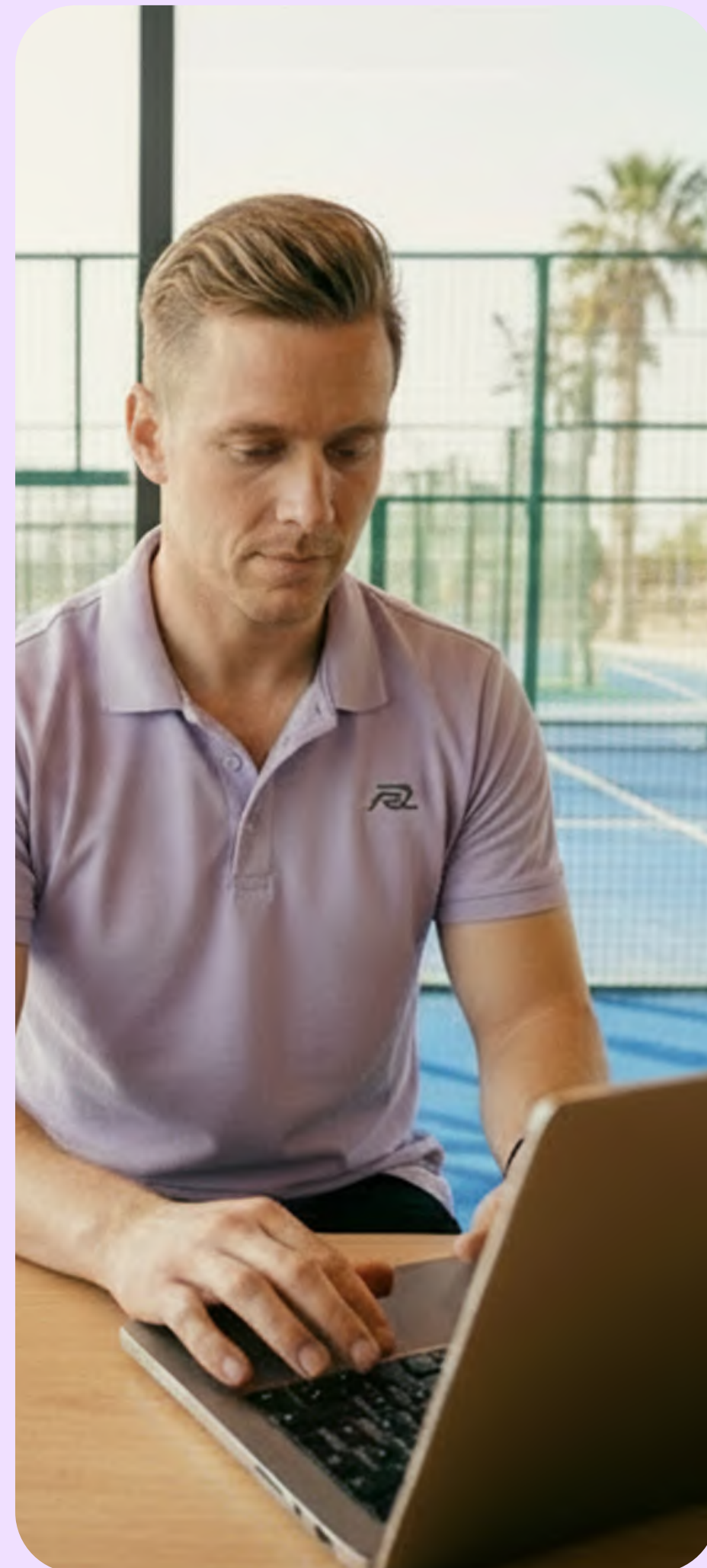




Brand visibility beyond your local market

A corporate wellness partnership puts a gym or studio in front of employees across entire companies, building awareness among an audience the business would otherwise never reach and creating a pipeline that no local marketing spend can replicate.

For gyms in cities or business districts, the reach extends further still. Not all corporate wellness platforms operate across borders, but those that do connect employees to fitness wherever they are, meaning a travelling professional in an unfamiliar city can walk through a local gym's door that their own marketing would never have reached.



Filling off-peak capacity

Every gym and studio has a second problem alongside acquisition: the floor plan. Facilities are sized and staffed for peak hours, and outside those windows the fixed costs keep running. **Eighty-five per cent of gym and studio owners say at least a quarter of their space goes unused during off-peak hours.** For 19%, more than half the facility sits empty at those times. **Eighty per cent have no strategy, or only an underdeveloped one, to change that.** Sixty-nine per cent of owners see corporate wellness partnerships as one of the most direct tools for filling that gap, turning capacity that currently generates nothing into a live revenue stream.





A recurring revenue stream

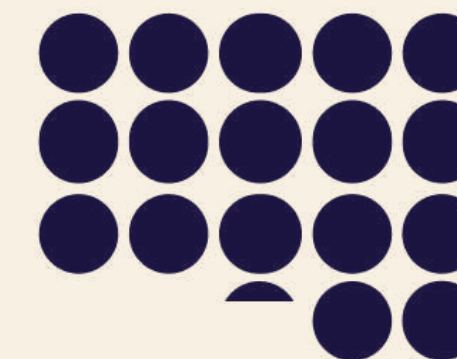
Forty per cent cite predictable, recurring revenue as a key draw. Unlike paid acquisition, which requires constant spend to maintain results, a corporate wellness partnership delivers long term, sustainable growth, that does not require additional, ongoing investment. ACSM lists worksite health promotion as a top overarching trend in the global fitness industry (ACSM, 2025). In the US, aggregator users, employer programmes, and insurance partnerships already account for an additional 6 percentage points of gym access beyond direct membership, bringing total fitness facility participation to 31% of the population (HFA, 2025). In Europe, aggregator partner locations grew 14% in 2025, reaching 148,000 sites (EuropeActive & Deloitte, 2026). Gyms and studios that build a corporate channel now are positioning for a market that is still growing.



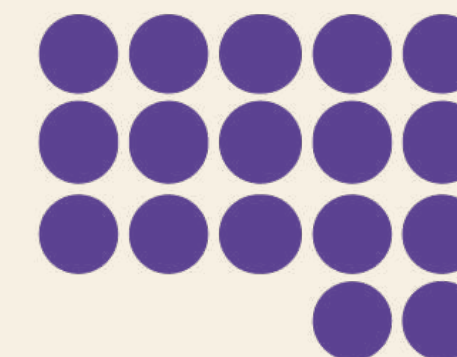
What are your top interests in corporate wellness platforms?

Question from the Wellhub Fitness Business Growth Report 2026 survey

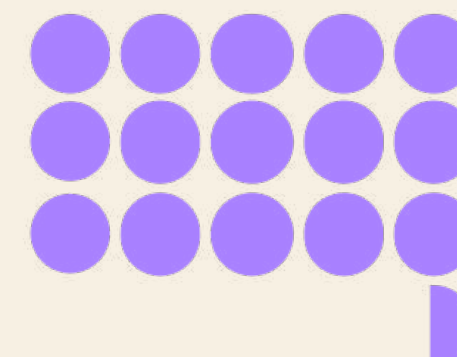
69% Content creation



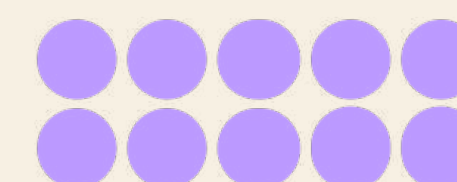
68% Lead management



63% Personalised marketing



40% Data analytics



3.5 The Wellhub Advantage

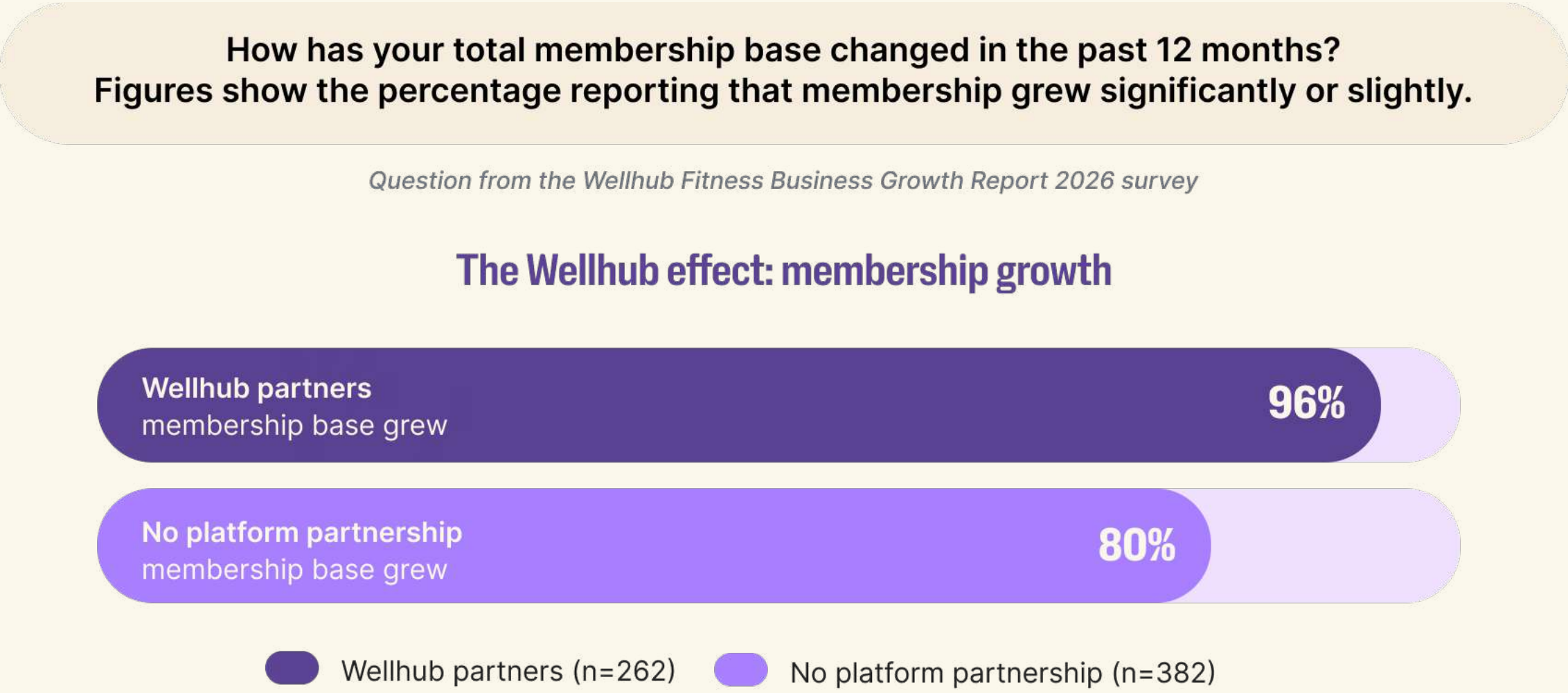
It's worth noting that the benefits of working with a corporate wellness partner may vary depending on the platform you choose. A number of factors, such as the platform's scale, maturity, approach to innovation and commitment to growing the fitness industry, will likely shape your overall experience and results.



Wellhub does not own gyms, studios, equipment or other wellness facilities - our corporate wellness model is focused on driving new members and incremental growth to our +100,000 global fitness and wellness partners from the 50,000 corporate businesses we work with worldwide. (Wellhub, 2026).

When an employer invests in Wellhub, their employees are supported in building their unique wellness journey, including finding the fitness and wellness facility that is right for them. The result is that gyms and studios working with Wellhub experience a risk-free partnership that brings them new members they wouldn't otherwise have acquired.

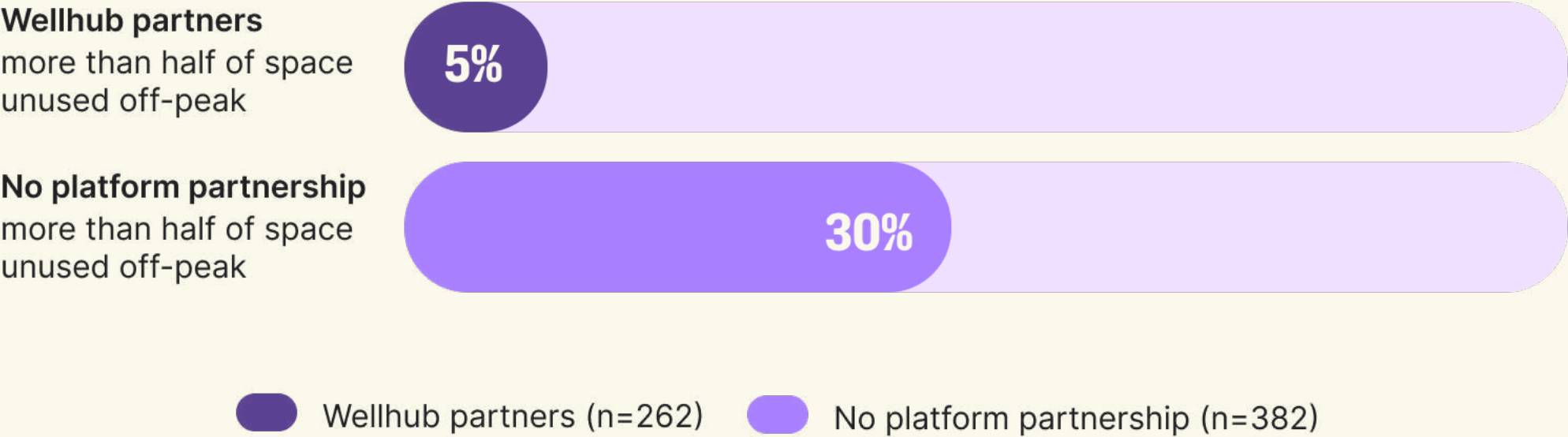
The survey data shows a measurable difference between Wellhub partners and owners who have not entered the corporate wellness channel. 96% of Wellhub partners say their total membership base grew in the past 12 months, compared to 80% of gym and studio owners not currently partnered with any corporate wellness platform. The off-peak capacity gap is equally stark: only 5% of Wellhub partners say more than half their space goes unused during off-peak hours, compared to 30% of owners with no platform partnership.



During off-peak hours, approximately what percentage of your facility space goes unused?

Question from the Wellhub Fitness Business Growth Report 2026 survey

The Wellhub effect: off-peak capacity



Among owners currently partnered with Wellhub, 75% agree that Wellhub provides a more sustainable financial model than other corporate wellness platforms.

A key reason is the quality of the members the platform delivers: an internal Wellhub analysis of users visiting partner facilities found that 84% were completely new customers to that specific location, with a further 10% having stopped visiting more than three months prior. Together, that means more than 93% of Wellhub-sourced visits represent genuinely incremental traffic, not members who would have joined anyway. Gross payouts to fitness operators within the Wellhub network nearly doubled year-over-year in 2025.



93%

of Wellhub-sourced visits are incremental traffic

84% completely new customers + 10% lapsed more than 3 months

Wellhub internal user analysis



75%

agree Wellhub provides a more sustainable financial model than other corporate platforms they have used

Wellhub partners only, n=260

In 2026 and beyond, the Wellhub advantage for fitness owners and operators is set to grow, as Wellhub progresses its coming together with platforms Urban Sports Club, FitPrime and 7Card. These developments enable Wellhub to offer new growth opportunities to partners, as well as an increasingly compelling product to clients, ultimately delivering even more new members to gyms and studios.



75%

agree Wellhub provides
a more sustainable
financial model

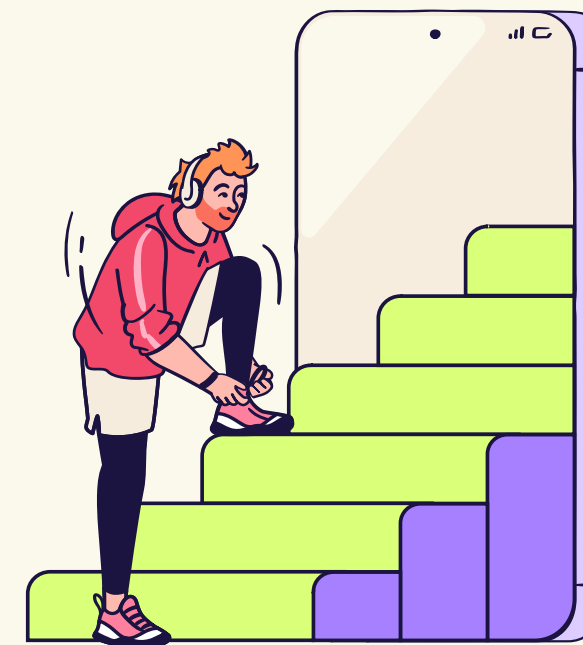
vs. other Corporate Wellness Platforms



91%

of Wellhub users are
completely new customers
to that location

additive, not cannibalised



89%

of operators report higher
retention for corporate-
sourced members

vs. traditionally acquired members

Wellhub was founded in Brazil, and it remains the platform's most established market and the one where the partnership model has had the longest time to mature. An independent study conducted by EY-Parthenon on behalf of Wellhub, covering 813 gym units across Brazil, found that 65% of Wellhub users visiting partner gyms attend one to two times per week on average, a frequency the study identifies as characterising a predictable, stable revenue contribution rather than a volatile one (EY-Parthenon, 2026). As the platform reaches similar levels of scale in other markets, the expectation is that this pattern of consistent, recurring visit behaviour follows.

The question of whether Corporate Wellness Platforms cannibalise existing direct memberships is one gym owners raise often. Ph.D Sports, one of Brazil's largest gym networks, published an analysis in May 2026 drawing on data from more than 1.25 million members tracked across their network over five years. Their finding: Wellhub's confirmed cannibalisation rate was 4.4% in April 2026, against a historical average of 3.5% across the same five-year period, and well below the 5% threshold the network considers manageable. The revenue is additive, not a substitution (Ph.D Sports, 2026).

Beyond delivering incremental member volume, Wellhub provides access to exclusive tools and services, to further support the success of its fitness and wellness partners.



Three Key Examples

Wellhub Financial Solutions

Supports operators with access to capital via a product that is flexible, transparent and built around the real-world needs of the fitness and wellness industry.



Off-Peak Hours

Helps operators to fill their gym floor or class slots throughout the day, converting idle capacity into revenue and maximising the facility's ROI.



Partner Challenges

Equips gym and studio owners with their own gamification tool to drive member engagement and retention - without having to invest in any technical development themselves.



As Wellhub continues to invest at scale into the success of the industry, there are more partner-centric developments in the pipeline, expected to be announced in the coming months.



The Gym Group

About The Gym Group

Type of business:	High value, low cost gym operator
Location(s):	260+ gyms nationwide across the UK
Core offering:	24/7 access, affordable, no-contract memberships
Wellhub partner since:	August 2025 (pilot), confirmed rollout 2026

Accelerating Growth in a Market That Is Ready

The Gym Group has been making fitness accessible across the UK since 2007, pioneering a new approach to gym membership: great facilities and equipment, open 24/7, with no contracts and at an affordable price. With around one million members, The Gym Group consistently receives high customer satisfaction scores. The opportunity ahead is significant too. According to the ukactive 2025 Health and Fitness Market Report, 18% of the UK population are now gym members, up 2 percentage points from 2023. Against this backdrop, a priority for The Gym Group is reaching new audiences at scale and fulfilling their “Next Chapter” growth plan, with a target to open c75 gyms over the next three years.

Opening a New Corporate Channel

The Gym Group began a pilot with Wellhub in August 2025, opening up a new corporate wellness channel across 190 gyms. The goal was clear: scale their access, particularly amongst corporate employees in city locations, where demand for workplace wellness benefits is highest. The pilot confirmed Wellhub was doing exactly that, bringing in net-new members who had not previously been part of The Gym Group community. By Spring 2026, the partnership had proven its value and rolled out to 244 locations nationwide.

Results

Nationwide Rollout

Following a successful pilot across 190 gyms, the partnership expanded to 244 locations across the UK within months.

Net-New Member Acquisition

The pilot confirmed The Gym Group was reaching incremental new members, supporting all 190+ locations.

Diversifying growth channels

The partnership directly supports The Gym Group’s Next Chapter growth plan, adding a corporate wellness channel that complements their existing member acquisition approach.

Strong Operational Integration

Technology and processes between both teams were integrated to deliver a seamless experience across all cohorts of users and all gym locations.



“We are delighted to progress our partnership with Wellhub and grow through a new employee wellbeing channel, broadening access to our excellent fitness facilities. With repeat visits to our gyms as well as high member satisfaction scores, there is clear demand amongst this audience, and we look forward to growing this successful partnership.”

Matthew Puddephat,
Chief Revenue Officer at TGG



90 DAYS TO A STRONGER BUSINESS

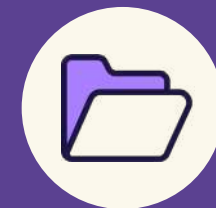
4. The Growth plan

The owners pulling ahead right now are not doing more things. They are doing the right things more deliberately. This chapter offers a starting point: three focused phases, built around what the data in this report shows works.

Phase 1: Know your numbers (Weeks 1 to 4)

Before spending more on marketing, understand what is already working.

Map where your members come from



Review the last 12 months of sign-ups and sort each one by channel. Look for which sources bring members who stay, not just members who join.

Calculate your CAC and LTV



Divide last month's marketing spend by new members signed to get your CAC. Multiply average monthly fee by average membership length to get your LTV. If your CAC exceeds a third of your LTV, your acquisition model needs attention.

Check your technology setup



A basic CRM that logs where members come from, flags when someone stops attending, and follows up automatically will save several hours a week. If that process is currently manual, the investment is likely to pay for itself quickly.

By the end of this phase, you should know which two or three channels bring your most valuable members, and what it costs to win each one.

Phase 2: Make the most of what you have (Weeks 5 to 8)

Eighty-five per cent of gym and studio owners say at least a quarter of their space sits empty during off-peak hours. That is revenue the business is already paying for.

Identify when your facility runs below 30% capacity



Target those slots with programming aimed at shift workers, parents, or remote workers, whose schedules do not follow the standard morning rush.

Introduce a flexible membership option



Members are not necessarily asking for cheaper. They are asking for less lock-in. A month-to-month option, even at a small premium, reduces the barrier to joining and, for many owners, improves retention.

Add one new revenue stream



Personal training, nutrition coaching, and recovery services are the three most common additions owners have made in the past two years. Pick one, price it properly, and offer it to existing members first.

By the end of this phase, at least one off-peak slot should be generating revenue, and new members should have a flexible option available to them.

Phase 3: Reach people your marketing cannot reach (Weeks 9 to 12)

Social media, referrals, and local advertising all target the same pool of people: those already looking for a gym, in your area, right now. Corporate wellness partnerships open a different channel entirely.

Understand how the channel works



When employers offer a wellness benefit, their employees gain subsidised access to gyms through platforms like Wellhub. For gym and studio owners, this means a pipeline of motivated members who did not come from a paid ad or a referral. Seventy-six per cent of owners currently partnered with a corporate wellness platform confirm this revenue is new income, not members who would have joined anyway.

Register on a corporate wellness platform



The process is straightforward and free. Once listed, your gym or studio becomes visible to employees across thousands of companies, people who are already motivated because their employer has made wellness a priority.

Build a simple welcome process



A facility tour, a brief goal-setting conversation, and an introduction to the class schedule are enough. Corporate members often visit off-peak, which directly addresses the capacity gap from Phase 2.

By the end of this phase, you should be registered, have received your first corporate member visits, and have a simple onboarding process in place.



YOUR COUNTRY IN CONTEXT

Global benchmarks, filtered to your market.

The findings in this report describe a global industry. But growth rates, member behaviour, and corporate wellness adoption shift from one market to the next. This chapter draws on the survey's 662 responses, split roughly evenly across the 11 countries surveyed, and zooms in on your market so you can see how it compares to the global picture.



Growth & Momentum

90% vs. 86% globally

of gym and studio owners report a consistently growing membership base over the past 12 months

47% vs. 40% globally

say revenue is already rising faster than costs and another 23% say the two are rising at roughly the same rate

72% vs. 56% globally

say their profit margin has increased over the past year

28% vs. 40% globally

are planning to open new locations in the next 12 months

78% vs. 78% globally

increased their marketing budget in the last 12 months

100% vs. 95% globally

say local competition has grown stronger over the past three years

Technology and Operations

67% vs. 65% globally

have invested in new technology (CRM, booking systems, automation, or AI tools) in the past 12 months

48% vs. 63% globally

say digital integration (app, booking system, wearable tech) is the area where they feel most behind

55% vs. 52% globally

say AI-driven tools are essential to compete effectively in member acquisition over the next 12 months

Where AI is currently being used: vs. 66%, 47%, 38, 30% and 10% globally

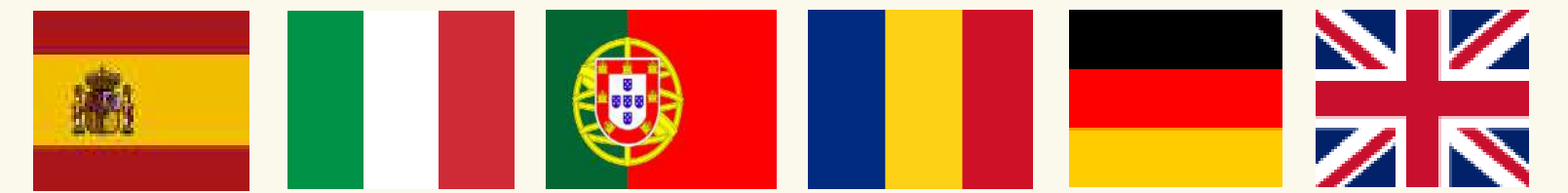
used by 83% of respondents in content creation, lead management and chatbots (40%), personalised marketing (45%), data analytics (22%), media buying (13%)

73% vs. 64% globally

agree their facility must evolve into a wellness destination, incorporating recovery, social spaces, and specialised programming, to remain relevant

83% vs. 77% globally

agree their facility requires physical upgrades or refurbishments to remain competitive



Growth & Momentum

85% vs. 86% globally

of gym and studio owners report a consistently growing membership base over the past 12 months

47% vs. 40% globally

say revenue is already rising faster than costs and another 23% say the two are rising at roughly the same rate

57% vs. 56% globally

say their profit margin has increased over the past year

28% vs. 40% globally

are planning to open new locations in the next 12 months

77% vs. 78% globally

increased their marketing budget in the last 12 months

100% vs. 95% globally

say local competition has grown stronger over the past three years

Technology and Operations

70% vs. 65% globally

have invested in new technology (CRM, booking systems, automation, or AI tools) in the past 12 months

60% vs. 63% globally

say digital integration (app, booking system, wearable tech) is the area where they feel most behind

53% vs. 52% globally

say AI-driven tools are essential to compete effectively in member acquisition over the next 12 months

Where AI is currently being used: vs. 66%, 47%, 38, 30% and 10% globally

used by 68% of respondents in content creation, lead management and chatbots (45%), personalised marketing (37%), data analytics (32%), media buying (13%)

64% vs. 64% globally

agree their facility must evolve into a wellness destination, incorporating recovery, social spaces, and specialised programming, to remain relevant

77% vs. 77% globally

agree their facility requires physical upgrades or refurbishments to remain competitive



Consumer Trends

77% vs. 86% globally

say their members have become more price-sensitive in the past 12 months

43% vs. 58% globally

have revised their pricing or contract structures in direct response to member demands

88% vs. 87% globally

agree members value flexibility in their membership more than they did 12 months ago

80% vs. 78% globally

say adding new or trending formats such as recovery, Pilates, or fitness racing is essential for growth in the next 12 months

55% vs. 66% globally

say members are actively demanding shorter contracts and more modular terms

Additional revenue streams added in the last 24 months: vs. 86%, 79%, 63% and 46% globally

personal training (75%), nutrition coaching (83%), retail or supplements (55%), recovery services (45%)

Member Acquisition and CAC

82% vs. 82% globally

say their cost to acquire a member has increased in the last 12 months

57% vs. 61% globally

say operating their business has become significantly less predictable over the last 12 months

Only 3% vs. 6% globally

have a dedicated marketing team or agency

65% vs. 71% globally

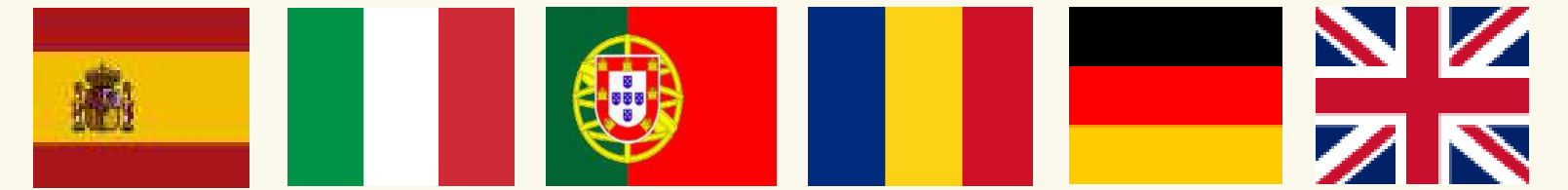
have worried about their business's financial sustainability at least occasionally in the last 12 months

100% vs. 98% globally

spend up to 50% of their weekly hours on marketing and acquisition

Channels where owners increased focus or investment in the last 12 months: vs. 73%, 67%, 54%, 39% and 36% globally

member referrals (63%), organic social and content (42%), paid social and influencer marketing (60%), email and text outreach (38%), paid search (27%)



Consumer Trends

83% vs. 86% globally

say their members have become more price-sensitive in the past 12 months

54% vs. 58% globally

have revised their pricing or contract structures in direct response to member demands

85% vs. 87% globally

agree members value flexibility in their membership more than they did 12 months ago

78% vs. 78% globally

say adding new or trending formats such as recovery, Pilates, or fitness racing is essential for growth in the next 12 months

63% vs. 66% globally

say members are actively demanding shorter contracts and more modular terms

Additional revenue streams added in the last 24 months: vs. 86%, 79%, 63% and 46% globally

personal training (85%), nutrition coaching (79%), retail or supplements (62%), recovery services (49%)

Member Acquisition and CAC

78% vs. 82% globally

say their cost to acquire a member has increased in the last 12 months

58% vs. 61% globally

say operating their business has become significantly less predictable over the last 12 months

Only **8%** vs. 6% globally

have a dedicated marketing team or agency

71% vs. 71% globally

have worried about their business's financial sustainability at least occasionally in the last 12 months

98% vs. 98% globally

spend up to 50% of their weekly hours on marketing and acquisition

Channels where owners increased focus or investment in the last 12 months: vs. 73%, 67%, 54%, 39% and 36% globally

member referrals (72%), organic social and content (61%), paid social and influencer marketing (55%), email and text outreach (37%), paid search (36%)



Off-Peak Capacity

80% vs. 85% globally

say at least a quarter of their space goes unused during off-peak hours; while 19% say more than half goes unused

65% vs. 80% globally

have no strategy or only an underdeveloped one for monetising off-peak capacity



Corporate Wellness Partnerships

78% vs. 59% globally

have a more positive perception of corporate wellness platforms than they did two years ago

49% vs. 76% globally

confirm revenue from corporate wellness platforms is new income, not cannibalised from existing members

Top interests in corporate wellness platforms: vs. 69%, 68%, 63% and 40% globally

improved off-peak utilisation (66%), enhanced brand visibility (54%), access to new or inactive customer bases (43%), recurring revenue (46%)

51% vs. 59% globally

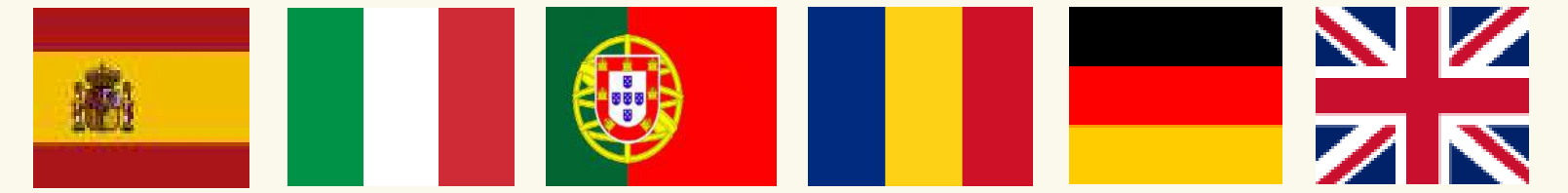
say corporate wellness platforms are extremely or very effective at helping them acquire new members

74% vs. 83% globally

agree corporate wellness platforms reach demographics they cannot reach through their own marketing

57% vs. 68% globally

say corporate wellness is very important or critical to their ongoing growth strategy



Off-Peak Capacity

86% vs. 85% globally

say at least a quarter of their space goes unused during off-peak hours; while 19% say more than half goes unused

77% vs. 80% globally

have no strategy or only an underdeveloped one for monetising off-peak capacity



Corporate Wellness Partnerships

64% vs. 59% globally

have a more positive perception of corporate wellness platforms than they did two years ago

78% vs. 76% globally

confirm revenue from corporate wellness platforms is new income, not cannibalised from existing members

Top interests in corporate wellness platforms: vs. 69%, 68%, 63% and 40% globally

improved off-peak utilisation (66%), enhanced brand visibility (68%), access to new or inactive customer bases (59%), recurring revenue (45%)

59% vs. 59% globally

say corporate wellness platforms are extremely or very effective at helping them acquire new members

84% vs. 83% globally

agree corporate wellness platforms reach demographics they cannot reach through their own marketing

71% vs. 68% globally

say corporate wellness is very important or critical to their ongoing growth strategy

Citations

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