



Market Report

A Snapshot of your Marketing Sector

Fitness and Leisure

This pack has been designed to provide information on setting up a business in the **Fitness and Leisure** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **May 2025**.

What do I need to know about the Fitness and Leisure market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ Indoor exercise (home, gym, indoor venues) has increased in popularity at the expense of outdoor fitness. Gym exercise has surpassed pre-pandemic levels with increase in the under 35 demographic and particularly men aged 16-24. (Mintel, *Exercise Trends – UK, May 2025*).
- ◆ Though the UK health and fitness club sector is impacted by the cost of living, consumers are still prioritising health and wellbeing. **31% of adults visited a public leisure centre** or swimming pool in the **last 12 months compared to 22% at a private health and fitness club**. Younger men are 17pp more likely to visit leisure facilities than younger women. (Mintel, *Health and Fitness Clubs – UK, September 2024*).
- ◆ Industry revenue from the personal training industry is expected to grow at a compound annual rate of **4.7% over the five years through 2029-30 to reach £1 billion**, driven by health and appearance consumer concerns. Despite growth in gym memberships and personal trainers, the sector may well face challenges such as competition from online fitness content (IBISWorld, *Personal Trainers in the UK*, October 2024).
- ◆ Increased home working and changing working patterns are giving workers more flexibility to pursue leisure activities. At the same time, decreased social interaction through work may increase desires to participate in social activities. Businesses could capitalise on this trend by offering local daytime fitness or hobby classes for homeworkers (Mintel, *Leisure time – UK, March 2024*).
- ◆ Revenue from Pilates and yoga studios is expected to grow at a compound annual rate of 1.4% to £1.1 billion over the five years through 2029-2030. The increasing focus on health and wellbeing coupled with an ageing and increasing population will boost demand for these more low impact activities (IBISWorld, *Pilates and Yoga Studios in the UK*, September 2023).
- ◆ According to [Scottish Household Survey 2023 \(Scottish Government, December 2024\)](#), **79% of adults** had taken part in some form of physical activity or sport in the previous 4 weeks. The most common activity was **recreational walking (with 71% of adults reporting doing this)**. In terms of individual sports, the most popular was, **multigym use / weight training (16%), swimming (13%), keep fit / aerobics (12%) and cycling (11%)**. Participation rates decreased with age – **89% of those aged 16-34** reported physical activity while only **67% of those aged 60 and over** ([Scottish Household Survey Data Explorer – Physical Activity](#)).
- ◆ The national organisation for this industry is [Sport Scotland](#). Other industry bodies include [UK Active](#), [Sport Excel UK](#), the [Sports and Physical Education \(PE\) Association UK](#) and the [Federation of Sports and Play](#).

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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **IBISWorld – Gyms & Fitness Centres in the UK (March 2024):** Membership fees accounted for **73% of industry revenue (£2.0 bn) in 2025**. Over the five years through **2029-30**, industry revenue is anticipated to grow at a compound annual rate of **2.6% to reach £3.2 billion**. Growing awareness of workout benefits in the 65plus age group, will expand gym demand where services are targeted for this market. Improvements to the customer experience will follow with the adoption of AI technology.
- ◆ **Mintel – Sports Participation – UK (October 2024):** The top four sports of swimming, football, athletics/running and cycling see more than one in 10 adults participate. These and other team, racket and outdoor sports improve health and can promote mental health benefits of social contact and time in the natural environment. 70% of adult sports participants are under 45 with the market gender balance even especially in the younger demographic.
- ◆ **Statista – Fitness industry in the UK (Feb 2025):** The top three fitness and health service purchases in 2024, include **gym memberships (22%), online services (11%), and wellness services (9%)**. With **42% of the UK using wearable devices** in 2024, the revenue in **digital fitness** and well-being apps is set to increase from USD 590 million in 2025 to **USD 780 million in 2029**.
- ◆ **Mintel – Health & Fitness Clubs – UK (September 2024):** Around **68%** of private gym participants visit their health and fitness club weekly, with **40%** visiting at least three times a week. With the flexible working trend, **63% of consumers would prefer cheaper hybrid gym memberships** (particularly popular with the UK younger millennials). Other membership plans such as pay-per-visit, short-term commitments, multi-access can offer further convenience.

There are also a number of online resources you may find helpful:

- [Scottish Government, Physical Activity and Sport](#) - information on the industry in Scotland, including how the government is promoting physical activity, relevant research around the importance of physical activity, and key policy actions.
- [Scottish Government, Scottish Household Survey December 2024](#) - provides information on sport and leisure participation statistics.
- [Sport Scotland, Sport for Life](#) – is the national strategy which aims to ensure that sport plays a part alongside other agencies to deliver an active Scotland where more people are more active more often.
- [Sport England, Active Lives Adult Survey November 2023-24](#) – provides information on levels of physical activity and types of activities undertaken.

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#), [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



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What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.



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How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) "[Find a Chartered Accountant](#)" tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk "[Licence Finder](#)" tool

Law Society of Scotland's "[Find a Solicitor](#)" tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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