GYMNATION
جيـمنيـشن

UAE & KSA HEALTH & FITNESS REPORT 2026

January 2026

THE DEFINITIVE SURVEY OF HEALTH, FITNESS & WELLBEING IN THE GULF REGION

15,322
RESPONDENTS

>745,000
DATA POINTS

2
COUNTRIES

UAE

KSA

Contents

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Foreword / Executive Summary

GymNation

Welcome to GymNation's 2026 UAE & KSA Health & Fitness Report, the most comprehensive study of health, fitness, and wellbeing attitudes and behaviours across the Gulf region. This year's report captures insights from 15,322 respondents - a 59% increase from our 2025 study of 9,644 participants - providing an unprecedented look into how residents of Saudi Arabia and the United Arab Emirates are approaching their health and fitness goals.

The data reveals a region in the midst of a fitness transformation. Health aspirations remain extraordinarily high, with 94% of respondents aspiring to be healthier - slightly up from 92% in 2025. Mental health awareness continues to grow, with 93% expressing a desire to improve their mental wellbeing. Most encouragingly, 65% report that their health has improved compared to last year, demonstrating that aspirations are translating into real results.

A significant finding of this year's report is the First-Time Gym-Goer Revolution. Among GymNation members surveyed, 51% had no gym membership in the 12 months prior to joining - representing thousands of individuals taking their first steps into structured fitness. This suggests the region is experiencing a genuine democratisation of gym culture, breaking down barriers that previously kept many away from the gym floor.

Gymtimidation remains a consideration, though progress is evident. A notable 56% of respondents report never feeling gymtimidation - a percentage similar to that in 2025. For those who do experience it, equipment knowledge (51%) and exercising in front of others (26%) remain the primary concerns, pointing to clear opportunities for education and community-building initiatives.

Women's fitness continues to demand attention. Our expanded data this year shows that 46% of women consider training in a women-only space essential, while 46% also believe women pay more than men for equivalent fitness products. In Saudi Arabia specifically, 73% of women surveyed believe they have adequate or improving access to quality gyms, signalling progress but also room for continued investment.

The financial landscape shows continued commitment to fitness investment. 43% of respondents have increased their fitness spending over the past year, while 42% also plan to increase spending in 2026. Affordability remains a top factor that would encourage more exercise, cited by one-half (50%) of respondents.

Looking ahead, strength training (46%) leads the fitness trends residents want to try. This is followed by functional training and HYROX-style workouts (29%), yoga, Pilates, and mindfulness exercises (28%). The emergence of hybrid fitness classes (26%) suggests a growing appetite for varied, innovative workout experiences.

This report serves as both a snapshot of where we are and a roadmap for where the industry can go. The data within these pages should inform operators, policymakers, and health advocates as they work to build a healthier, more active Gulf region aligned with the ambitions of Saudi Vision 2030 and We the UAE 2031.

Key Trends at a Glance

LARGEST-EVER **HEALTH & FITNESS SURVEY** IN THE MIDDLE EAST

59%
(INCREASE IN PARTICIPANTS VS LAST YEAR)

94% aspire to be healthier than they currently are
(VS 92% LAST YEAR)

93% want to improve their mental health

65% report their health has improved compared to last year

51% of GymNation members are first-time gym goers

56% never feel any gymtimidation

46% exercise four or more times a week

43% increased their fitness spending

50% say more affordable gym memberships would encourage them to exercise more

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نحن الإمارات WE THE UAE 2031

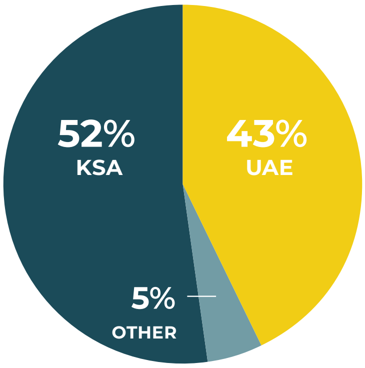
VISION رؤية 2030 المملكة العربية السعودية KINGDOM OF SAUDI ARABIA

Methodology & Demographics

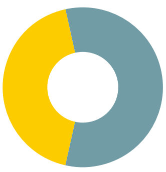
15,322
RESPONDENTS

+59% GROWTH FROM 2025

45%	55%
ENGLISH	ARABIC



GENDER



Our 2026 survey was designed to capture the most comprehensive and accurate picture of health and fitness attitudes, behaviours, and aspirations across the UAE and KSA.

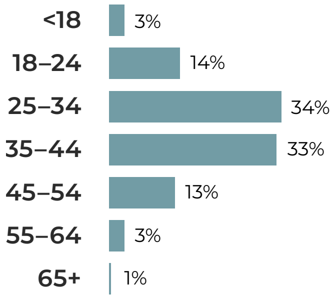
Survey Design: The questionnaire comprised 45+ questions. The survey was offered in two languages, with 45% choosing to complete the survey in English and 55% in Arabic. The survey primarily featured closed-ended questions (multiple choice, yes/no, Likert scales) as well as open-ended questions to enable both quantitative & qualitative analysis.

Data Collection: The survey was distributed primarily through GymNation marketing channels, including email, WhatsApp, push notifications and social media platforms. Data was collected over a three-week period in December 2025 - January 2026, using Typeform as the survey platform. IP-based validation was used to prevent duplicate submissions.

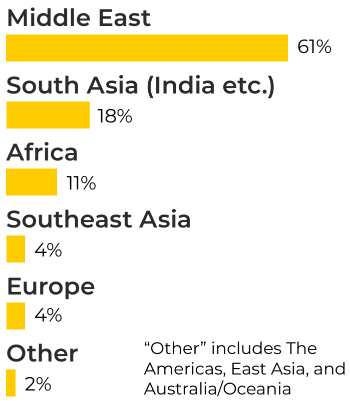
Sample Size & Growth: Sample size increased significantly, from 9,644 to 15,322 (a 59% increase). This reflects both the growing reach of GymNation and increased awareness of the survey among our members and the broader public.

Gender Trends: Female representation has increased from 39% in 2025 survey to 43% in 2026 - a positive trend reflecting both growing female participation in fitness and our efforts to reach more women through targeted outreach and ladies-only facilities.

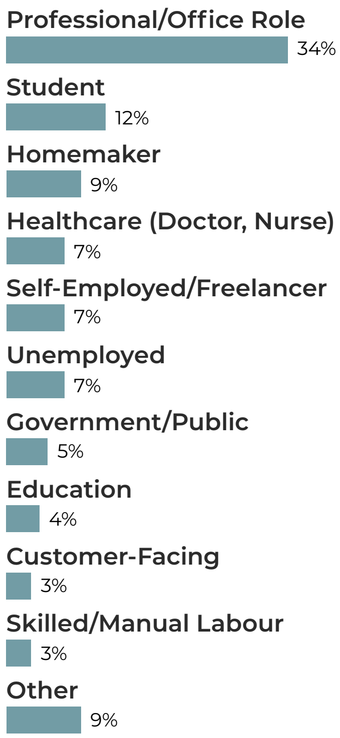
By age group



Ethnicity/Region



Occupation



Age distribution of the responses remained practically unchanged from 2025. The 25–44 group dominates our sample, comprising 67% of respondents. This reflects both the demographic profile of gym-goers and the working-age population in the UAE and KSA. The relatively small proportion of over-55s (4%) represents an opportunity for the industry to develop programming targeted at older adults.

Ethnicity: Middle Eastern/Arab respondents (61%) are the largest respondent group.

Occupation: Professional and office-based workers form the largest occupational group (34%), reflecting the urban, educated demographic that is most likely to engage with fitness and wellness. The 12% student population indicates strong interest in fitness among younger demographics.

Methodological Notes

Self-Selection Bias: As respondents were primarily recruited through GymNation channels, our sample likely skews more health-conscious than the general population. However, the inclusion of non-members and the substantial sample size provides robust insights into regional attitudes.

Year-over-Year Comparisons: Where we present 2025 comparisons, these reference data from our previous report. Some questions have been modified or added, so not all metrics have direct comparisons.

International Benchmarks: UK and USA comparison figures are drawn from published industry surveys and research reports. Methodological differences mean these comparisons should be interpreted as indicative rather than precisely comparable.

Rounding: All percentages are rounded to the nearest whole number. Due to rounding, some totals may not sum exactly to 100%.

Response Completeness: The survey allowed respondents to skip certain questions, meaning not all 15,322 participants answered every question. Consequently, percentage totals in some charts may not sum to exactly 100%, and the sample size (n) varies between questions. Additionally, questions permitting multiple responses (e.g., "select all that apply") will naturally exceed 100% when totalled.

Health Perceptions & Aspirations

Health aspirations across the UAE and KSA remain at near-universal levels, with the overwhelming majority of residents expressing a desire to improve their health and wellbeing. The consistency of these aspirations year-over-year underscores a cultural shift toward prioritising personal health.

ASPIRATION TO BE HEALTHIER

94% aspire to be healthier than they currently are

+2PP

76% **UK** (PureGym, 2025)

75% **US** (Life Time, 2024)

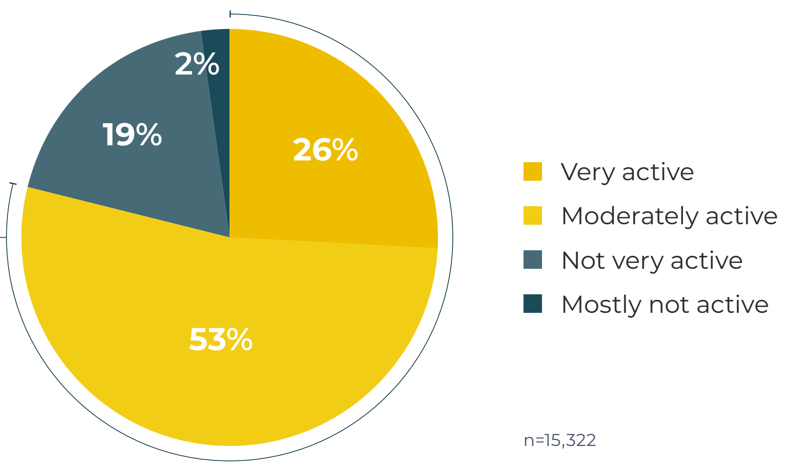
A remarkable 94% of respondents aspire to be healthier than they currently are - slightly up from 92% in 2025. This consistency suggests that health improvement is continuing to be a priority across the region.

HOW ACTIVE ARE YOU?

Respondents were asked to rate their overall current lifestyle in terms of activity. The majority (79%) consider themselves at least moderately active, suggesting a population that is engaged with physical activity to some degree.

How would you rate your overall current lifestyle in terms of activity?

79% are at least moderately active

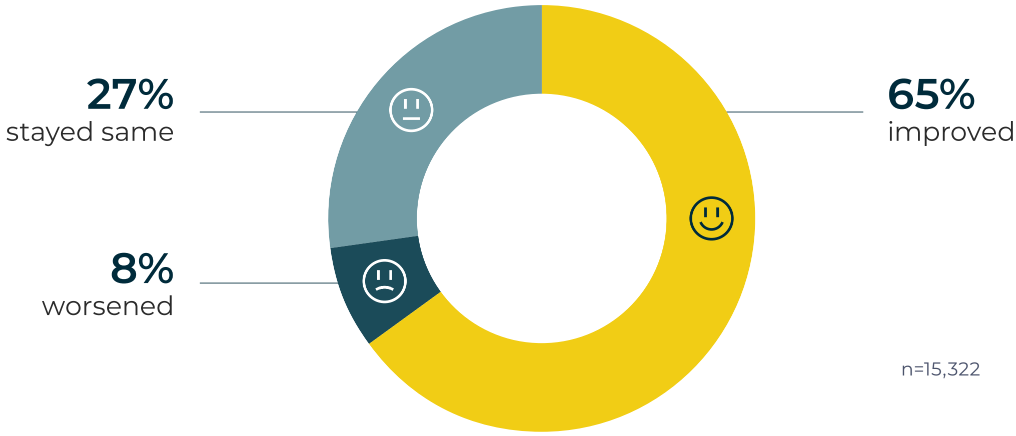


n=15,322

HEALTH IMPROVEMENT YEAR-OVER-YEAR

Crucially, aspirations appear to be translating into results. When asked about health compared to the same time last year, the fact that nearly two-thirds of respondents report health improvements is a powerful indicator that the region's fitness infrastructure, cultural attitudes, and government policies are enabling real progress.

Compared to this time last year, how has your health changed?



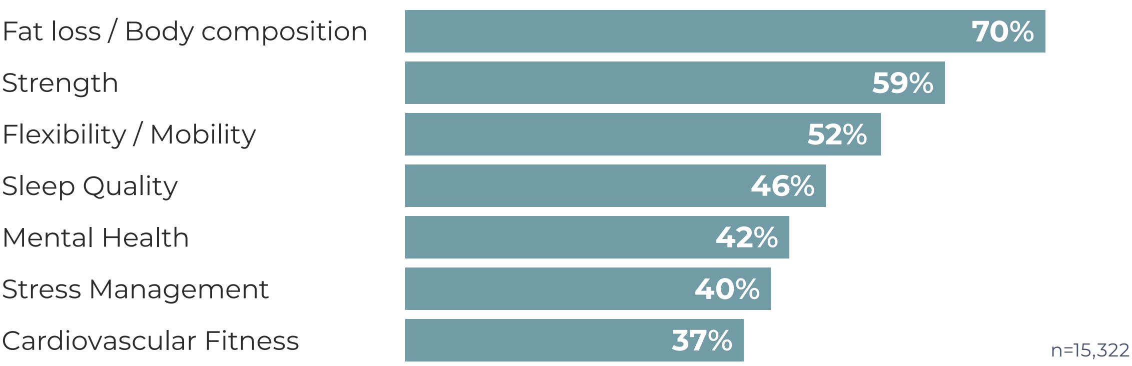
DO YOU LOOK AFTER YOUR HEALTH AS MUCH AS YOU SHOULD?

70% feel they are looking after their health to some degree, while 13% acknowledge they are not - representing a clear opportunity for intervention and support.

HEALTH ASPECTS NEEDING IMPROVEMENT

Fat loss and body composition remain the top priority (70%), followed by strength (59%) and flexibility/mobility (52%). Notably, sleep quality (46%) and mental health (42%) feature prominently, reflecting growing awareness of holistic wellness.

Which areas of health do you most want to improve?



OVER HALF OF GYMNATION MEMBERS HAD NO GYM MEMBERSHIP IN THE 12 MONTHS BEFORE JOINING.

AFFORDABLE FITNESS IS CREATING NEW DEMAND, NOT JUST TAKING MARKET SHARE.

The First-Time Gym-Goer Revolution

One of the most significant findings of the 2026 survey is the scale of new entrants to gym-based fitness. Among GymNation members surveyed, more than half had never held a gym membership before - representing a fundamental shift in who is accessing structured fitness facilities.

FIRST-TIME GYM MEMBERS

51%

-6 PP

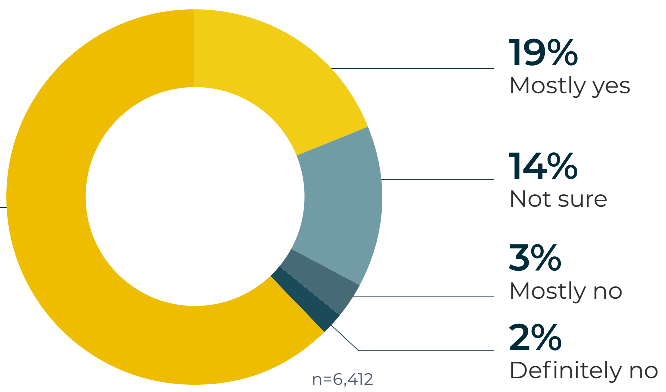
of GymNation members had no gym membership in the 12 months before joining

This 51% figure represents a decrease from about 57% in 2025, however, the influx of new gym members continues to stay strong. These 6,400+ individuals are taking their first structured steps into fitness - a testament to the democratisation of gym culture in the region.

MEMBERSHIP RETENTION INTENTIONS

Of those who answered the question of whether they plan to continue their membership for at least 3–6 months, 82% of members expressed positive intentions to continue, while only 5% indicate they will likely not continue. A large number of people (~8,900) did not answer this question, which suggests many members are still evaluating their commitment.

Do you plan on continuing your membership for at least another 3–6 months?



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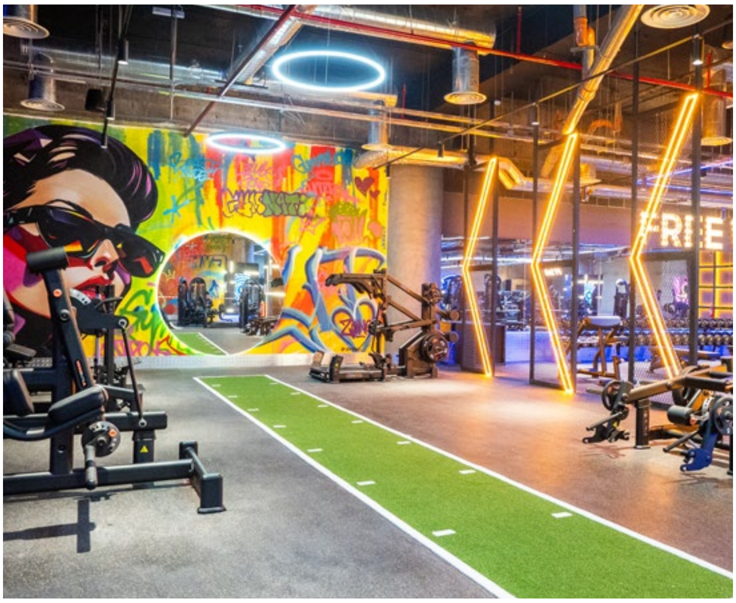
WHY THIS MATTERS

The influx of first-time gym-goers represents both an opportunity and a responsibility for the fitness industry:

- These members may require more support, guidance, and encouragement than experienced gym-goers.
- Equipment orientation and exercise education become critical retention tools.
- Creating a welcoming, non-intimidating environment is essential for converting first-timers into long-term members.
- The success of this cohort will significantly impact the region's overall health outcomes.

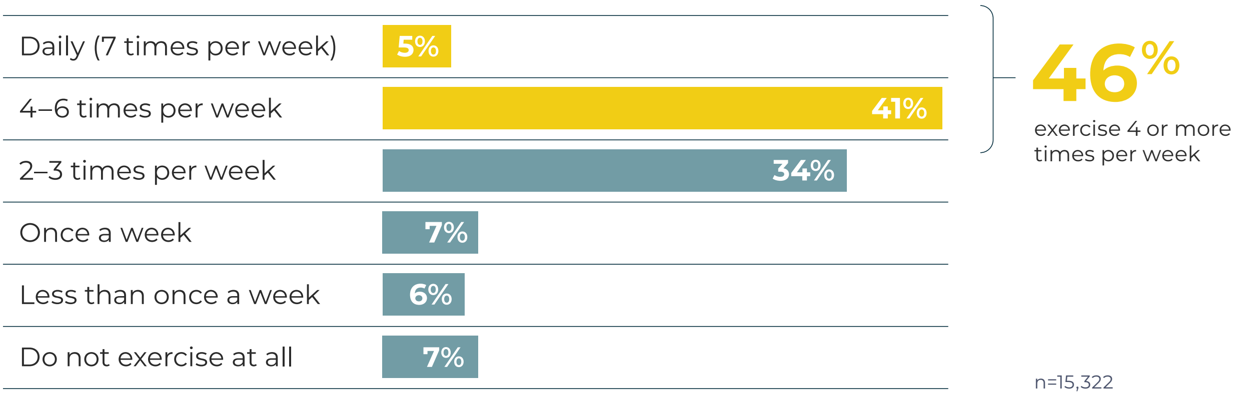


80% OF RESPONDENTS EXERCISE TWO OR MORE TIMES PER WEEK.

Exercise Habits & Activity Levels

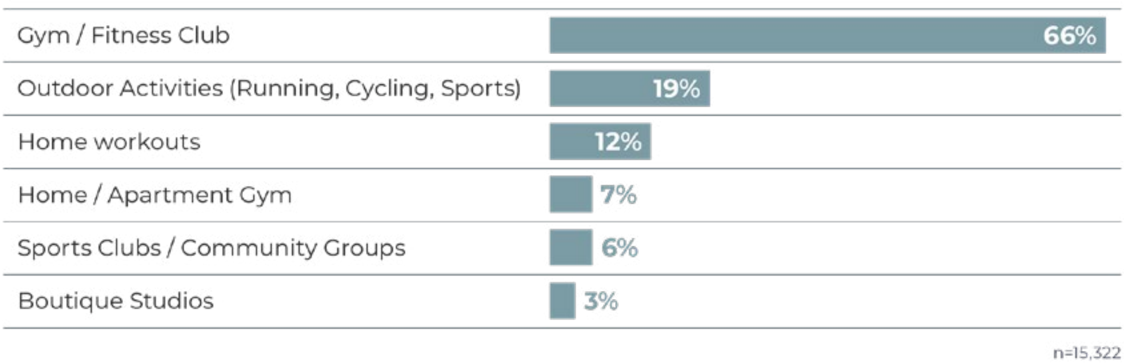
Understanding how often and where residents exercise provides crucial insights into the region's fitness landscape. The 2026 data reveals a population that is largely engaged with regular exercise, with gyms remaining the dominant setting for physical activity. Combined, 46% of respondents exercise 4 or more times per week - consistent with 2025 findings. This high-frequency cohort represents the core fitness-engaged population.

How often do you currently exercise?



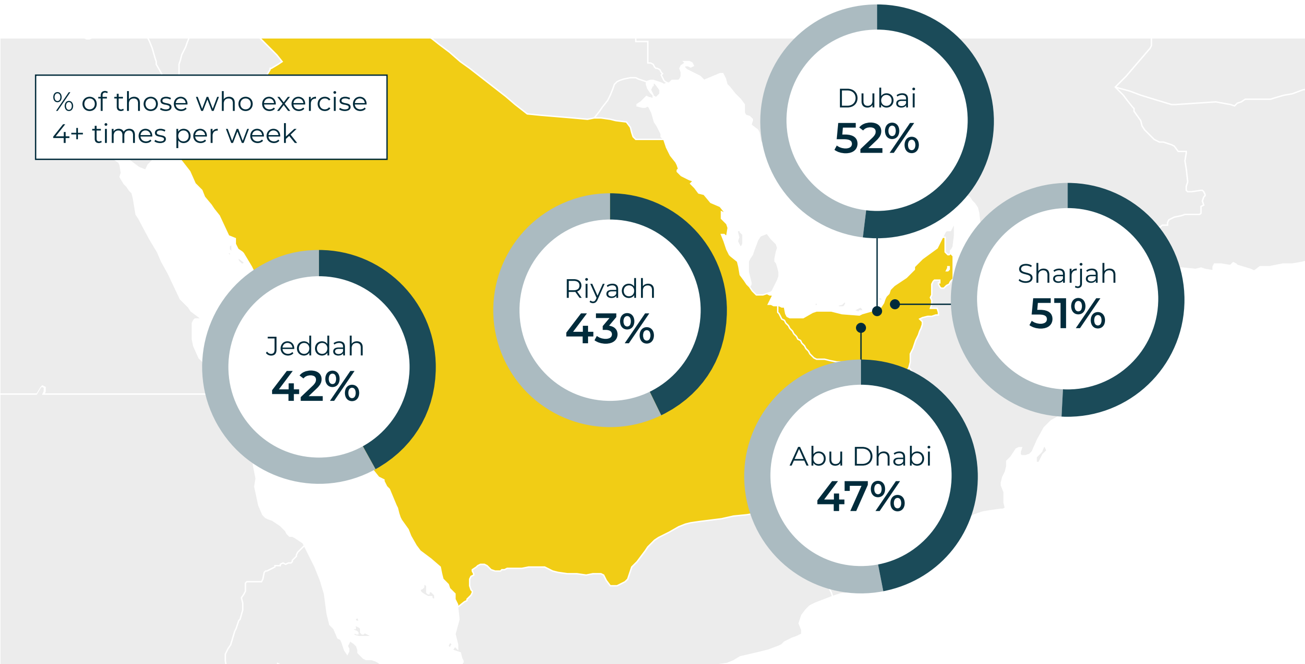
Gyms and fitness clubs dominate as the primary exercise setting (66%), followed by outdoor activities (19%) and home workouts (12%). Boutique studios remain a niche but growing segment at 3%.

In which settings do you primarily exercise?



UAE cities (Dubai, Sharjah, Abu Dhabi) show higher exercise frequency rates than KSA cities. Dubai leads at 52%, while Jeddah has the lowest rate among major cities at 42%. This suggests potential for growth in KSA markets.

Exercise frequency by city



Exercise frequency decreases with age, following expected patterns.

Those exercising 4+ times per week by age

n=15,272
50 invalid responses

Barriers to Fitness

Understanding why people struggle to maintain or begin exercise routines is crucial for developing effective interventions. The 2026 data reveals familiar barriers - time, motivation, and affordability - alongside opportunities for the industry to better support those who have stopped exercising. Among those who gave a reason for not joining a gym, affordability remains the primary barrier (58%), which is up from 52% in last year's survey. This reinforces the importance of accessible pricing strategies in expanding gym access.

Main reasons for not joining a gym in the past 12 months

Affordability (too expensive)	58%
Lack of time (work/family)	38%
Accessibility (no gyms nearby)	22%
Lack of motivation	22%
Lack of convenient options	20%
Feeling intimidated	6%

UP FROM 52% IN 2025

n=1,030

For those who said they stopped exercising, time constraints and affordability reasons again dominate, but notably, lack of exercise knowledge (28%) and mental health challenges (26%) feature as addressable barriers that operators could target through education programmes and supportive environments.

Top reasons people stopped exercising

Lack of time (work/family commitments)	49%
Can't afford gym memberships	32%
Lack of knowledge about exercises	28%
Mental health/low mood	26%
Health condition limits	9%
Find exercise boring	9%

n=922

"GYMTIMIDATION" IS REAL, AFFECTING 50% OF WOMEN AND 35% OF MEN. IT IS MORE PRONOUNCED IN MIXED GENDER FACILITIES.

Gymtimidation:
Breaking Down Barriers

Gymtimidation - the feeling of anxiety or intimidation associated with gym environments - remains a consideration for the industry, though the 2026 data shows encouraging progress. A majority of respondents now report never feeling gymtimidation, suggesting that efforts to create welcoming environments are having an impact.

OVERALL GYMTIMIDATION LEVELS

A significant 56% of respondents report never feeling any gymtimidation. The percentage of women experiencing gymtimidation (50%) has not changed - but among men there has been a big drop - 42% to 35%. Also notable is the difference between KSA and UAE. Likely due to separate facilities for men and women in the KSA, levels of gymtimidation there are significantly lower (45% vs. 60% among women, 32% vs. 41% among men).

50% WOMEN

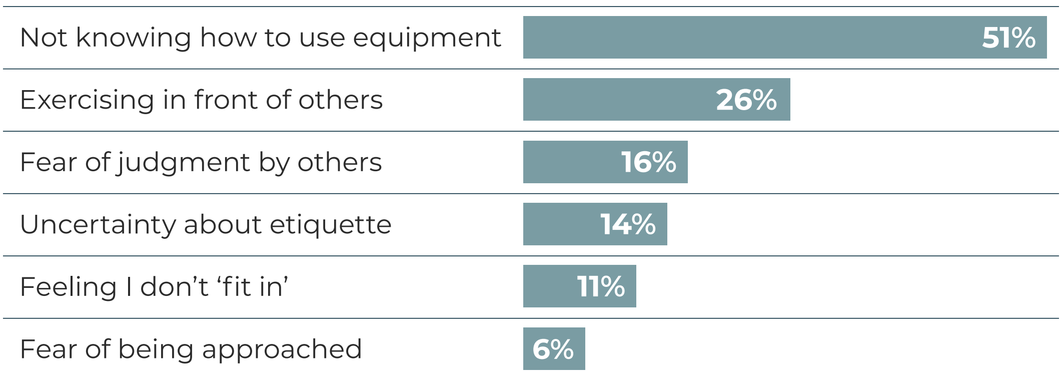
35% -7 PP MEN

experienced some form of intimidation at the gym

KSA: **45%** UAE: **60%**

KSA: **32%** UAE: **41%**

Main causes of gymtimidation



n=8,522
(From respondents who answered this question)

Equipment unfamiliarity is the leading cause of gymtimidation, cited by 51% of respondents who feel gymtimidation. This is highly actionable - equipment orientation, beginner programmes, and clear signage can directly address this barrier.

THE DATA POINTS TO CLEAR INTERVENTIONS:

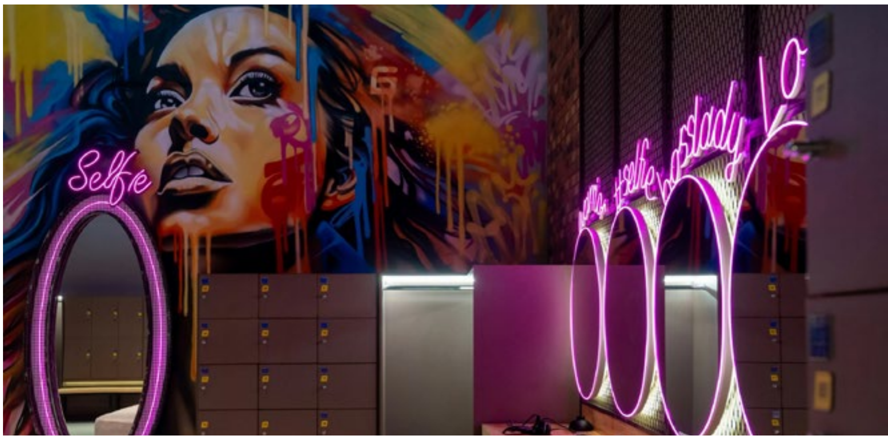
- **Equipment education:** With 51% citing equipment unfamiliarity, orientation programmes and clear machine instructions are essential.
- **Beginner-friendly zones:** Dedicated spaces for newcomers can address the 26% who feel uncomfortable exercising in front of others.
- **Women-focused spaces:** Given the gender gap, women-only areas and classes remain important.
- **Community building:** Creating supportive, judgment-free environments to address belonging concerns.

46% OF WOMEN CONSIDER WOMEN-ONLY SPACES ESSENTIAL.

Women's Fitness: A Dedicated Focus

A COMPREHENSIVE VIEW

The 2026 survey provides expanded insights into women's fitness needs and preferences across the Gulf region. With 6,588 female respondents (43% of the total sample), this year's data offers the most comprehensive view yet of what women want and need from their fitness experiences.



46% of women consider women-only training spaces essential

7% prefer women-only spaces, but it's not a must

The overwhelming majority (53%) of women prefer or require women-only training spaces, with 46% considering it essential. This underscores the continued importance of ladies-only fitness options in the region.

Do you believe that women's gym memberships offer good value for money?

Yes, they offer great value for money	23%
Yes, they offer fairly good value for money	23%
They offer exactly what I would expect	4%
They offer nothing close to what you pay for	7%

n=6,588
(From respondents who answered this question)

When women were asked whether they believe women's gym memberships offer good value for money, 46% perceive good or great value from women's gym memberships, while 7% feel they are not getting value for their investment.

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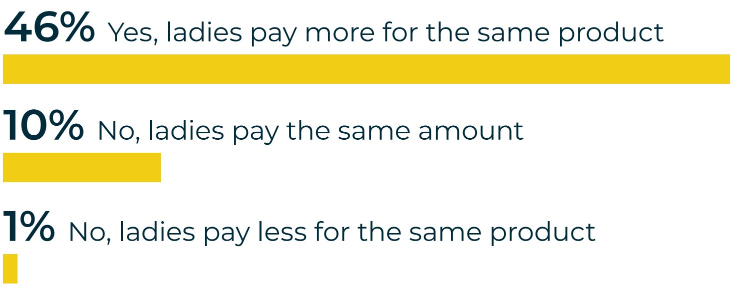
PRICE PERCEPTION

A striking 46% of women believe they pay more than men for equivalent fitness products. This "pink tax" perception represents a significant concern that operators should address through transparent pricing.

Do women pay more for the same services?



ACCESS TO QUALITY GYMS (KSA FOCUS)

Among the 4,283 female respondents in Saudi Arabia, 73% report adequate or improving access to quality gyms - a positive indicator of progress under Vision 2030. However, 11% still report a lack of quality facilities, representing an opportunity for continued investment.

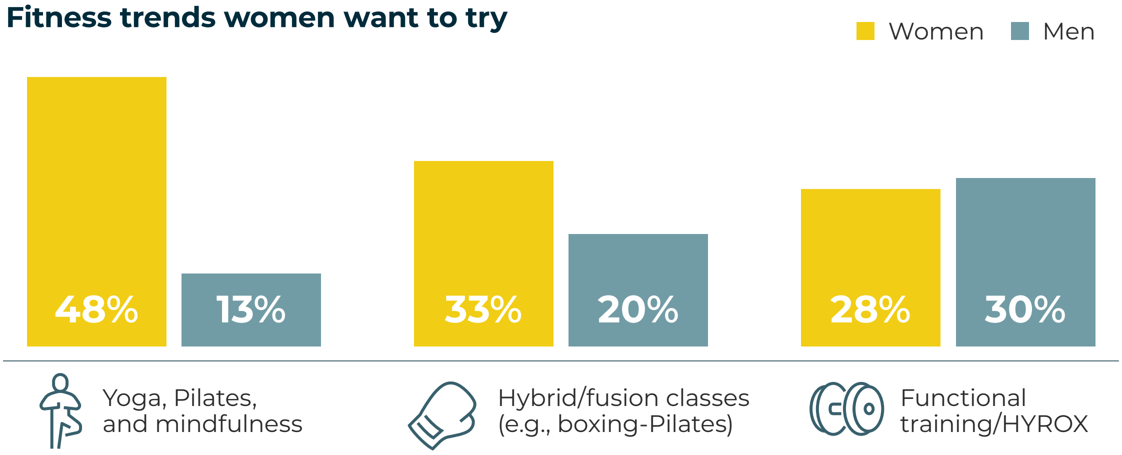
Do you feel that women in Saudi Arabia have enough access to good-quality gyms and fitness facilities?

Yes, ladies have good access	42%
Yes, but it could be further improved	31%
No, there is a lack of quality facilities	11%

n=4,283
(From respondents who answered this question)

36% of Saudi women report that the number of gyms available to them is about right, 17% report too few, and 4% say there are more than enough.

Fitness trends women want to try



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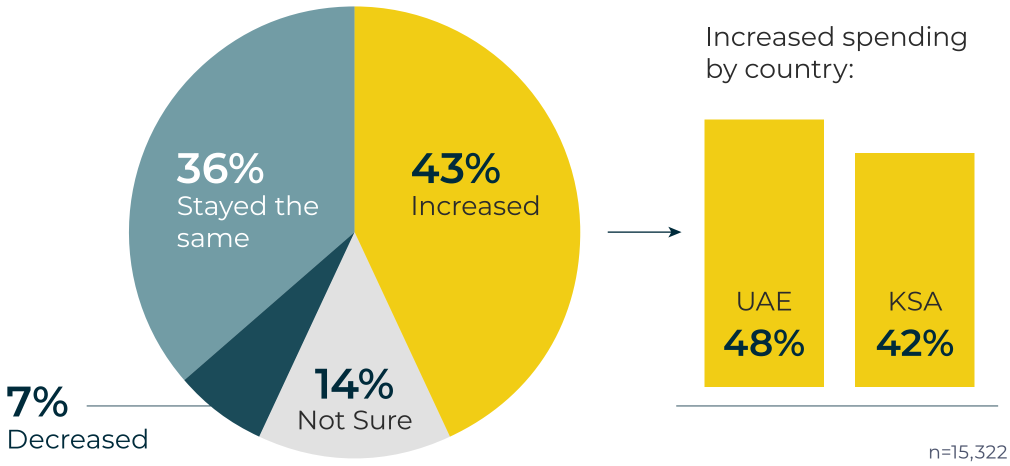
43% HAVE INCREASED THEIR FITNESS SPENDING THIS YEAR, FOR THE SECOND YEAR IN A ROW. FITNESS INVESTMENT IN THE REGION IS STRONG.

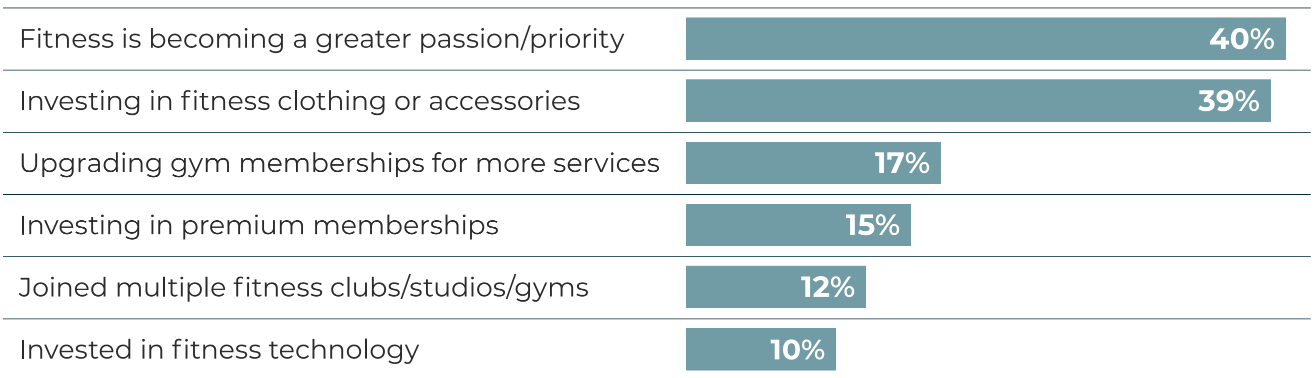
Financial Trends & Spending

The financial commitment to fitness remains strong across the UAE and KSA. The 2026 data shows that despite economic pressures, a significant portion of residents continue to invest in their health and fitness - and many plan to increase this investment in the coming year. 43% have increased their fitness spending in the past year - consistent with 2025 findings. Only 7% have decreased spending, suggesting fitness remains a protected priority in household budgets. UAE residents show higher spending increase rates (48% vs. 42% in KSA), potentially reflecting differences in disposable income or fitness market maturity.

Has your spending on fitness (gym membership, home equipment, classes) changed over the past year?



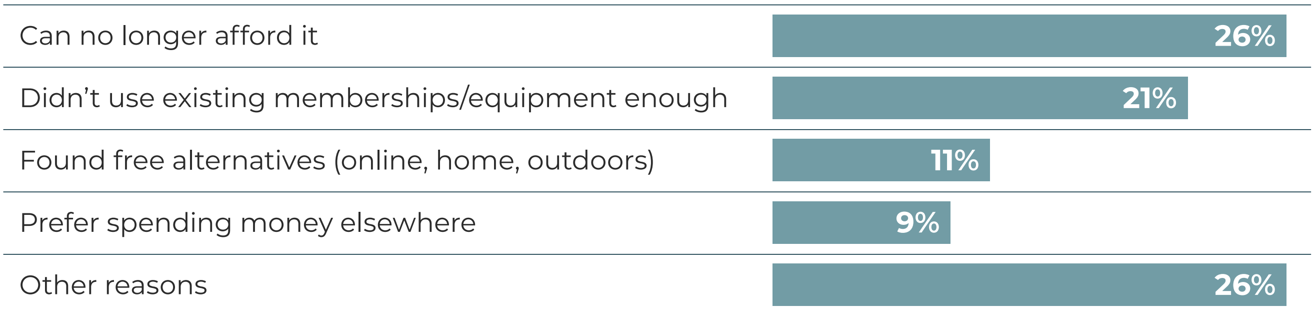
Reasons for increased spending



n=6,633

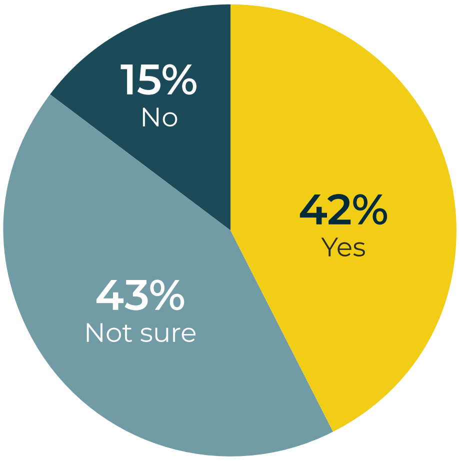
PROUD SUPPORTER OF

If you decreased your fitness spending, why?



n=1,021

Are you planning to increase your spending on health and fitness in 2026?



n=15,322

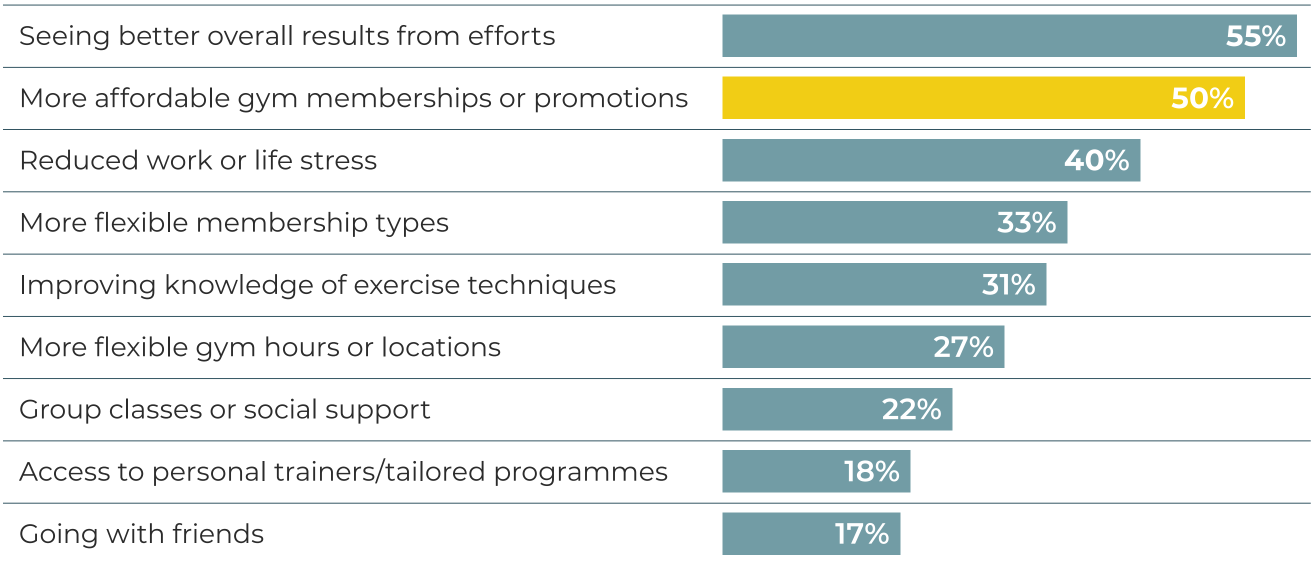
42% plan to increase fitness spending in 2026, while only 15% say no. The large “not sure” segment (43%) represents an opportunity - many may be persuaded to invest more with the right offerings.

AFFORDABILITY OPPORTUNITY

Affordability consistently emerges as a key lever for expanding fitness participation. The 2026 data confirms that price remains a barrier for many and a motivator for even more - representing a significant opportunity for operators who can deliver value at accessible price points.

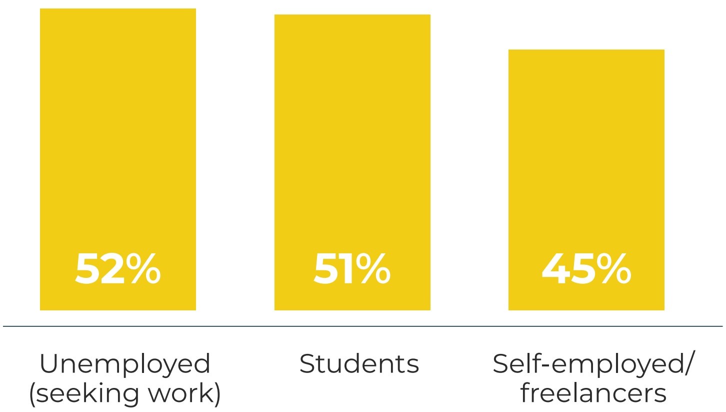
While results (55%) top the list, affordability (50%) is the second most cited factor (see chart on the next page). This confirms that accessible pricing is a key driver of fitness participation.

What would encourage you to exercise more in the next year?



n=15,322

Affordability concerns by occupation



Certain groups show heightened sensitivity to pricing. Students and unemployed individuals show the highest price sensitivity, suggesting targeted pricing strategies for these segments could expand access significantly.

66% DESCRIBE THEIR DIET AS SOMEWHAT HEALTHY OR VERY HEALTHY.

57% OF RESPONDENTS USE SUPPLEMENTS - FROM VITAMINS TO PROTEIN TO CREATINE.

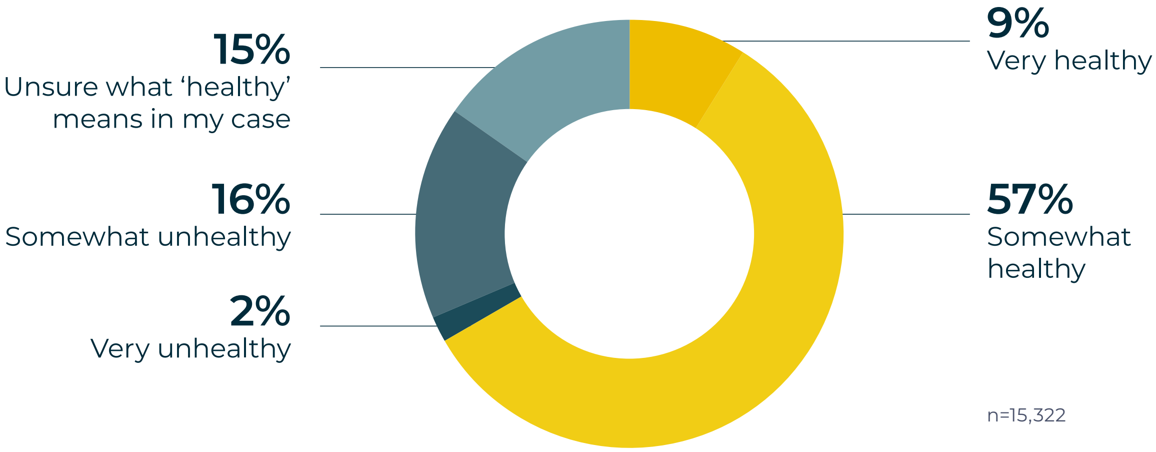
Diet, Nutrition & Supplements

Nutrition habits provide important context for understanding the region's approach to overall health. The 2026 data reveals that while most residents consider their diets reasonably healthy, there is significant room for improvement in nutritional education and awareness.

DIET SELF-ASSESSMENT

While two-thirds of respondents assess their diet as somewhat healthy or very healthy, 15% are unsure what a healthy diet looks like for them - a significant education opportunity. Combined with the 18% who acknowledge unhealthy eating habits, there is clear demand for nutritional guidance.

How would you describe your diet?



n=15,322

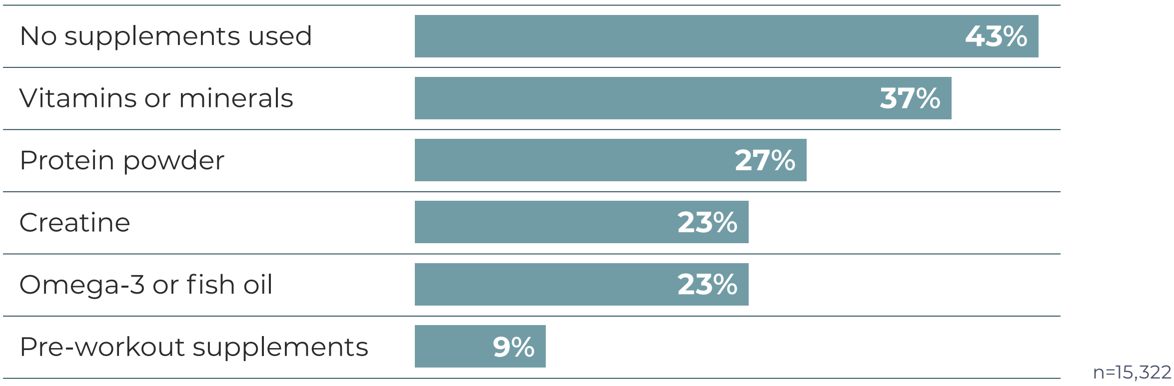
Only 13% track food intake regularly, while 49% rarely or never track. This suggests significant opportunity for nutrition apps and coaching services.

Do you count calories or track your food intake?

SUPPLEMENT USAGE

57% use at least one type of supplement, with vitamins/minerals (37%) and protein powder (27%) being most popular. Creatine use (23%) is notable, suggesting increasing sophistication in supplementation.

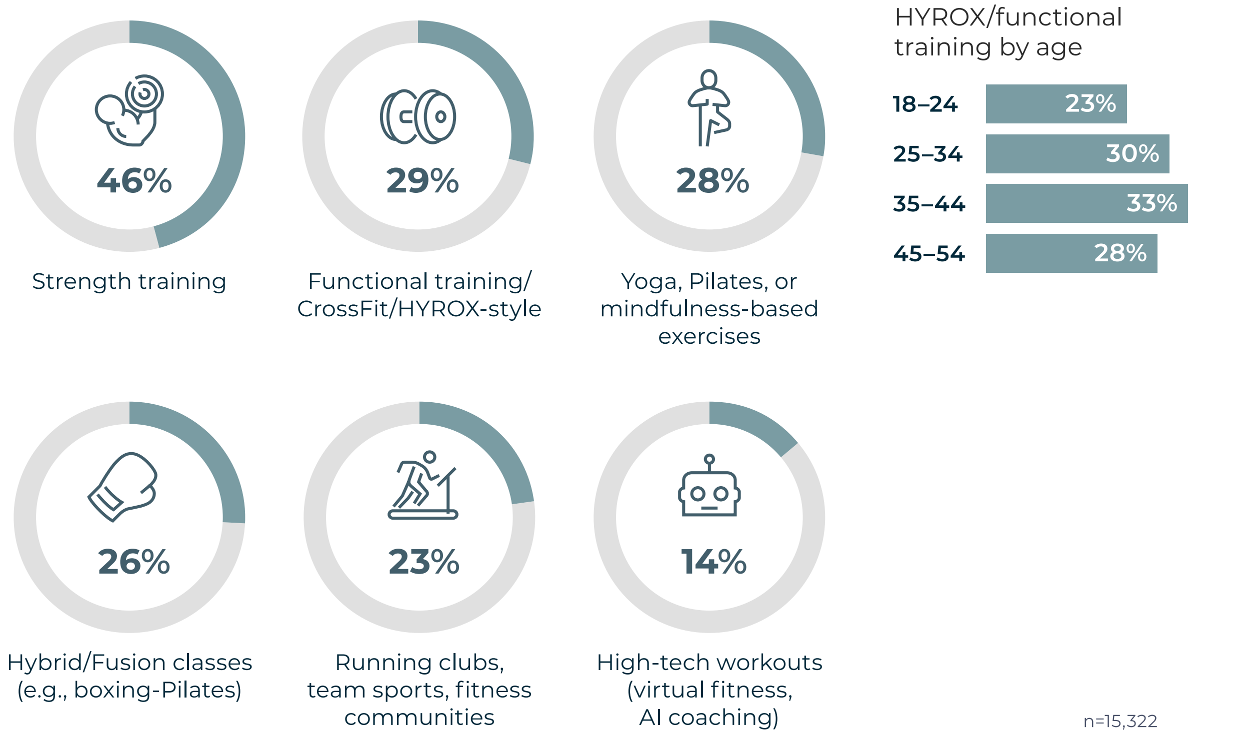
Do you currently use any dietary supplements for health or fitness?



Fitness Trends for 2026

Understanding what fitness trends residents are interested in trying provides valuable guidance for operators, instructors, and the industry at large. The 2026 data reveals strength training as the dominant interest, with functional fitness and mindfulness-based exercises also showing strong appeal.

Trends respondents want to try



Interestingly, 35–44 year-olds show the highest interest in HYROX-style workouts (33%), suggesting this trend appeals to established fitness enthusiasts seeking new challenges.

GENDER GAPS

The largest gender gap in any trend category is in mindfulness-based exercise interest (48% women vs. 13% men - see page 23). This suggests yoga/Pilates programming should particularly target and serve the female market.

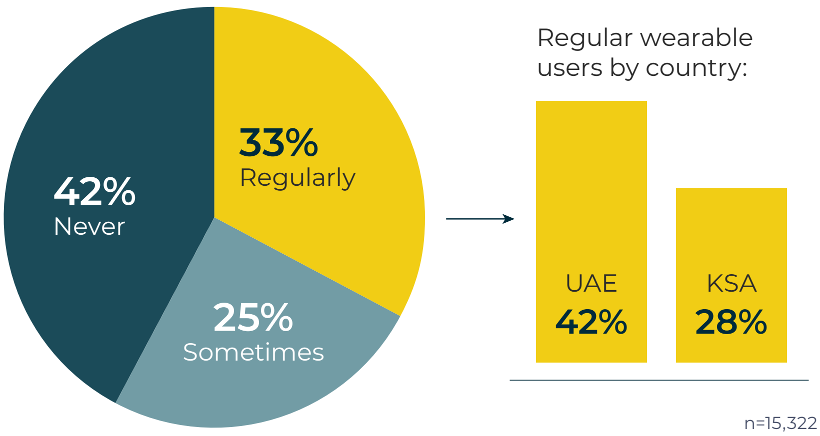
TECHNOLOGY AND WEARABLES

Wearable technology continues to play a growing role in how Gulf residents engage with fitness. The 2026 data shows approximately one-third of respondents regularly use fitness wearables, with significant variation by country.

WEARABLE DEVICE USAGE

33% use wearables regularly - consistent with 2025. Combined with occasional users, 58% have some engagement with fitness technology.

Wearable device usage frequency



UAE residents show significantly higher wearable adoption (42% vs. 28% in KSA), suggesting opportunity for growth in the Saudi market.

INTEREST IN HIGH-TECH WORKOUTS

When asked about interest in high-tech workouts (virtual fitness, AI coaching), 13–15% of respondents across different age groups expressed interest. While not yet mainstream, high-tech workouts represent a growing niche that may expand as technology improves and becomes more accessible.

Mental Health & Wellbeing

Mental health awareness and prioritisation have become central themes in the region's fitness conversation. The 2026 data confirms that the overwhelming majority of residents view mental health improvement as a priority, and many see exercise as a key tool for achieving it.

93% +1PP aspire to improve mental health

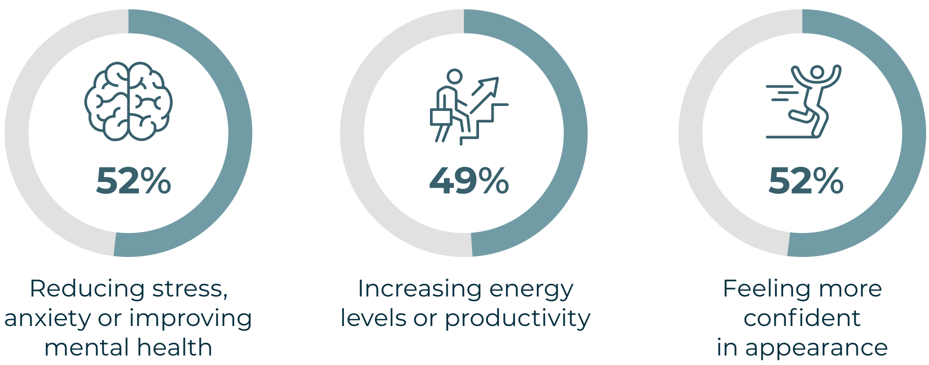
94% KSA
90% UAE

KSA residents show slightly higher mental health prioritisation (94% vs. 90%), possibly reflecting the rapid social and lifestyle changes occurring under Vision 2030.

EXERCISE MOTIVATION: MENTAL HEALTH CONNECTION

Mental health benefits feature prominently among exercise motivations. This data confirms that gym-goers increasingly view fitness as a mental health tool, not just physical transformation.

What motivates you to exercise?



n=15,322

MENTAL HEALTH AS BARRIER

Of those who stopped exercising, 26% cite mental health as a reason. This represents nearly 250 individuals who need supportive, low-barrier entry points to return to fitness.

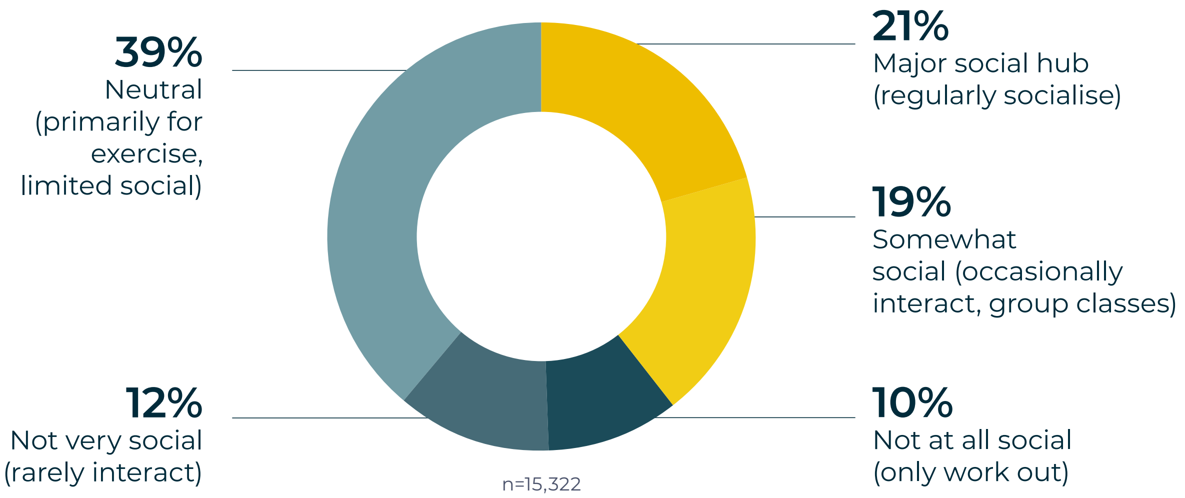
40% INTERACT AT THE GYM SOCIALLY, WITH 31% FORMING FRIENDSHIPS AND RELATIONSHIPS.

Social Dimensions of Fitness

GYM AS A SOCIAL HUB

The gym has evolved beyond a place for physical transformation into a social hub for many residents. The 2026 data reveals how fitness intersects with social life, community building, and the impact of cultural and religious events on exercise habits. 40% view the gym as at least somewhat social, with 21% considering it a major social hub. This represents a significant opportunity for community-building programming.

To what extent has going to the gym become a social part of your life?



RELATIONSHIPS FORMED AT THE GYM

31% have formed meaningful friendships or relationships at the gym - consistent with 2025 findings. The gym remains a viable space for community connection.

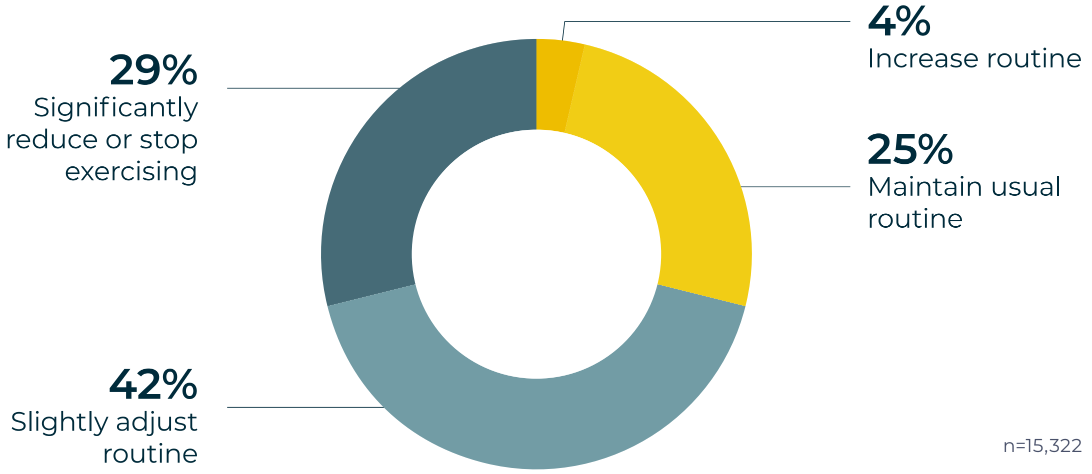
Have you formed any meaningful friendships or relationships as a result of going to the gym?

PROUD SUPPORTER OF

IMPACT OF LIFE EVENTS & RELIGIOUS HOLIDAYS

Cultural and religious events significantly impact exercise habits. 71% adjust or reduce their exercise during life events or religious holidays like Ramadan. This has significant implications for gym operators in terms of scheduling, programming, and member retention during these periods.

Do life events or religious holidays affect your exercise habits?



Conclusions & Recommendations

The GymNation UAE & KSA health and fitness report 2026 reveals a region deeply committed to health improvement and increasingly engaged with structured fitness. The following conclusions and recommendations emerge from the data.

KEY CONCLUSIONS

1. **Health Aspirations Remain Universal**
   With 94% aspiring to be healthier and 93% prioritising mental health, the desire for improved wellbeing is near-universal. Crucially, 65% report actual health improvements - aspirations are translating into results.
2. **The First-Time Gym-Goer Revolution is Real**
   51% of GymNation members had no prior gym membership - representing a fundamental democratisation of fitness access. These new entrants require targeted support and education to become long-term members.
3. **Gymtimidation is Declining but Persists for Women**
   56% never feel gymtimidation, but women remain significantly more likely to experience it (50% vs. 35% for men). Equipment knowledge and exercising in front of others are the primary concerns.
4. **Women's Fitness Requires Dedicated Focus**
   46% of women consider ladies-only spaces essential, while 46% also believe they pay more than men for equivalent services. The "pink tax" perception and preference for ladies-only spaces demand attention from operators.
5. **Affordability Drives Access**
   One-half of the respondents say more affordable memberships would encourage more exercise. Price remains the primary barrier for non-gym-goers (58%) and a key motivator across all segments.
6. **Strength Training Dominates Trend Interest**
   46% want to try strength training, followed by functional/HYROX (29%) and yoga/Pilates (28%). Hybrid classes (26%) suggest growing appetite for innovative programming.

RECOMMENDATIONS FOR OPERATORS

1. **Invest in First-Time Beginner Programs:** Develop comprehensive onboarding, equipment orientations, and beginner-friendly zones to support the 51% who are new to gyms.
2. **Address Gymtimidation Proactively:** Create welcoming environments through staff training, clear signage, educational content, and community-building initiatives.
3. **Expand Women's Offerings:** Ensure adequate women-only spaces, address pricing perceptions through transparency, and develop programming that meets the distinct preferences of female members.
4. **Leverage the Affordability Opportunity:** Develop tiered pricing, student/unemployed discounts, and flexible membership options to expand access.
5. **Capitalise on Trend Interest:** Invest in strength training facilities, consider HYROX-style programming, and explore hybrid class formats.
6. **Integrate Mental Health:** Position fitness as a mental health tool, develop stress-reduction programming, and train staff to support members holistically.
7. **Plan for Cultural Calendar:** Develop Ramadan-specific programming, adjust hours and intensity options, and support members through life events.

RECOMMENDATIONS FOR POLICYMAKERS

1. Continue investing in women's fitness infrastructure, particularly in underserved areas of KSA.
2. Support affordable fitness access through subsidies, public facilities, or tax incentives for operators serving underserved populations.
3. Integrate fitness and mental health in national health strategies, reflecting the strong public demand for both.
4. Track progress against Vision 2030 and We the UAE 2031 health targets using annual survey data.

Trend Spotlight: HYROX

The World's Fastest-Growing Fitness Race

WHAT IS HYROX?

HYROX is a global fitness race featuring 8 km of running (8 x 1 km segments) interspersed with 8 functional workout stations including SkiErg, sled push, sled pull, burpee broad jumps, rowing, farmers carry, sandbag lunges, and wall balls. Events are held worldwide, including in Dubai and Abu Dhabi, with participants competing against time and each other.

WHY THE APPEAL?

- **Accessible Competition:** Unlike bodybuilding or powerlifting, HYROX offers a competitive outlet for everyday gym-goers.
- **Goal-Oriented Training:** Provides a clear target for training, increasing motivation and adherence.
- **Community Focus:** Team and doubles categories create social fitness experiences.
- **Hybrid Training:** Appeals to those seeking variety beyond traditional strength or cardio.

HYROX has emerged as one of the most significant fitness phenomena of the decade, transforming from a niche German event into a global fitness racing movement. From 650 participants at its inaugural event in Hamburg in 2018, HYROX is projected to welcome over 1.3 million participants across 85+ cities in 30+ countries during the 2025/26 season.

SURVEY FINDINGS

1. 29% of respondents express interest in trying functional training or HYROX-style workouts.
2. Interest is highest among 35–44 year-olds (33%), followed by 25–34 year-olds (30%).
3. Gender split is nearly even: 30% male interest vs. 28% female interest.
4. 46% exercise 4+ times per week - the ideal training frequency for HYROX preparation.

GLOBAL GROWTH STATISTICS

The numbers tell a compelling story of exponential growth:

Year / Season	Participants
2018 (First Event)	650 participants in Hamburg
2023 / 2024 Season	175,000 participants across 65 races
2024 / 2025 Season	550,000+ participants across 80+ races
2025 / 2026 Season	1.3+ million participants projected across 85+ cities, 30+ countries

Key metrics: 5,000+ certified training facilities worldwide, 38% female participation (up from 24% in 2020), and a 98%+ completion rate thanks to no time cap.

REGIONAL RELEVANCE: UAE & KSA

The Middle East has embraced HYROX with enthusiasm. The Abu Dhabi event in July 2025 attracted 3,506 athletes from 124 nationalities, including 340 Emiratis and 213 professional competitors. Women represented 41% of participants, with the 30–35 age group being the most represented. Events have also been held in Dubai, Sharjah, and Qatar, with HYROX aiming to establish the Middle East as a Tier 1 destination on the global calendar.

Our survey data aligns with this trend: 79% of respondents are “very” or “moderately” active, with 46% exercising 4+ times per week - the perfect demographic for HYROX training.

Trend Spotlight: Reformer Pilates

From Niche to Necessity

Reformer Pilates has undergone a remarkable transformation, evolving from a niche boutique offering to a mainstream fitness staple. The global Pilates Reformer market is projected to grow from USD 7.6 billion in 2025 to USD 16.8 billion by 2035, at a CAGR of approximately 8%. In 2024, Pilates was the most popular workout globally on ClassPass for the second consecutive year, with an 84% increase in bookings year-over-year.

SURVEY FINDINGS

1. 28% of respondents express interest in yoga, Pilates, or mindfulness-based exercises.
2. Strong gender disparity: 48% of women interested vs. 13% of men.
3. 52% cite flexibility/mobility as a health area needing improvement - Pilates directly addresses this.
4. Boutique studios currently serve only 3% of the market, indicating significant room for growth.

MARKET MOMENTUM

Key indicators of Reformer Pilates growth:

- **Search Interest:** Reformer Pilates searches surged 57% in the UK since late 2024. Reformer Pilates (+71% YoY) was the top Pilates format globally in 2025.
- **Trend Ranking:** Rose from #10 in 2024 to #2 in fitness trend rankings for 2025.
- **Club Pilates:** The world's largest Pilates franchise now operates 1,000+ studios globally, adding 153 locations in 2024 alone.
- **Popularity:** Professional footballers including David Beckham, LeBron James, and Cristiano Ronaldo credit Pilates for performance gains.
- **Technology Integration:** Smart reformers with AI-driven form correction are emerging, including connected units from Reform RX, Flexia, and Frame Fitness.

WHY REFORMER PILATES RESONATES

Several factors drive the Reformer Revolution

Factor	Why It matters
Full-Body Efficiency	Works multiple muscle groups simultaneously with spring resistance.
Low-Impact, High-Results	Ideal for injury prevention and rehabilitation, low-impact training saw 109% increase in 2024.
Adaptability	Adjustable spring resistance suits all fitness levels from beginners to athletes.
Longevity Focus	61% of exercisers now prioritise living a healthier, longer life over aesthetics.
Social Media Appeal	#pilates saw 105% increase in TikTok posts from 2023-2024.

Trend Spotlight: Recovery & Wellness

From Afterthought to Priority

Recovery has evolved from a post-workout afterthought to a primary driver of gym membership and attendance. The global wellness economy reached a record $6.8 trillion in 2024, growing 8% year-over-year, with recovery modalities projected to grow at 11% annually through 2029. The fitness recovery services market alone is projected to grow from $8.2 billion in 2025 to $24.5 billion by 2035.

SURVEY FINDINGS SUPPORTING RECOVERY FOCUS

1. 46% cite sleep quality as a health area needing improvement.
2. 40% cite stress management as a priority.
3. 52% want to improve flexibility/mobility.
4. 93% aspire to improve mental health.
5. 65% report their health has improved compared to last year.

THE RECOVERY REVOLUTION

Industry data reveals surging interest in recovery modalities:

- **ClassPass Data (2025):** Sports recovery sessions increased 155% year-over-year, making it one of the fastest-growing fitness categories.
- **Cold Plunge Market:** The cold plunge tub market reached $330–380 million in 2024 and is projected to reach $530–660 million by 2033. Paris 2024 Olympics used 650 tons of ice.
- **Gym Integration:** Over 70% of professional sports teams in North America have adopted cold-water immersion as part of their recovery protocols, with boutique fitness chains seeing a 30% increase in cold plunge installations since 2022.
- **Wearable Tracking:** Gulf region users prioritise recovery-focused habits including: cold showers, stretching, massage therapy, sauna, breathwork, ice baths, and meditation.

RECOVERY MODALITIES TRENDING IN 2026

Key recovery offerings gaining traction:

Modality	2026 Status
Thermal Therapy	Sauna and steam usage surging; contrast therapy becoming mainstream. Premium gyms rolling out cold plunge facilities.
Cryotherapy	Once reserved for elite athletes, cryotherapy stations appearing in mid-market gyms and boutique studios.
Red Light Therapy	RLT panels integrated alongside traditional massage tools. Used for muscle recovery, skin health, and inflammation reduction.
Compression Therapy	Pneumatic leg sleeves and recovery boots improving circulation. Nike × Hyperice launched wearable recovery suite (June 2024).
Breathwork	Performance breathwork classes combining physical and mental recovery. Mental wellness sector growing at 10% annually.
Mobility Training	Dedicated mobility sessions viewed as "longevity investment" rather than optional stretching.

Policy Alignment: Supporting National Visions

The findings of our 2026 Health & Fitness Report align closely with the national health and wellbeing agendas of both Saudi Arabia and the United Arab Emirates. Both nations have placed physical activity, wellness, and quality of life at the centre of their long-term strategic visions - and both have set ambitious targets for increasing population-level fitness participation.

Our survey of 15,322 respondents continues to demonstrate that these government initiatives are working: health aspirations are high, gym participation is growing, first-time gym-goers are entering the market in significant numbers, and fitness investment is increasing year-over-year.

SAUDI ARABIA: VISION 2030

Saudi Arabia's Vision 2030 has placed physical activity and wellness at the heart of national transformation. The Quality of Life Program explicitly targets increasing regular physical activity from 13% (2015 baseline) to 40% by 2030 - one of the world's most aggressive national fitness targets.

PROGRESS & ACHIEVEMENTS

- **Target exceeded:** 59% of Saudi adults now engage in physical activity for 150+ minutes per week - significantly surpassing the 40% target.
- **Sports Boulevard:** Riyadh's 135km urban fitness corridor opened its first phase in February 2025, featuring 4.4 million square metres of green space with pedestrian paths, cycling tracks, and fitness facilities.
- **Women's sports revolution:** The Saudi Women's Premier League launched in October 2022, with 77,000+ girls in the Schools League and 330,000+ female athletes registered by 2024 - a 150% increase from pre-2016 levels.

2026 Survey Findings for KSA

Exercise 4+ times per week	43%
Aspire to be healthier	94%
Health improved vs. last year	65%
Aspire to improve mental health	94%
Women: adequate access to quality gyms	73%
First-time gym-goers (GymNation)	51%

UNITED ARAB EMIRATES: WE THE UAE 2031

The UAE's "We the UAE 2031" vision and National Strategy for Wellbeing 2031 establishes comprehensive frameworks for enhancing quality of life. The National Sports Strategy 2031 aims to increase sports participation to 71% of the population through 17 transformational initiatives.

PROGRESS & ACHIEVEMENTS

- **Dubai Fitness Challenge:** Over 16 million cumulative participants since 2017. The 2025 edition attracted a record 3 million participants, with 307,000+ runners and 40,000+ cyclists.
- **Wellbeing infrastructure:** 90 supporting initiatives across 40+ priority areas under the National Strategy for Wellbeing 2031, focusing on healthy lifestyles, mental health, and quality of life in cities.
- **Industry transformation:** 76% of UAE fitness facilities have evolved into hybrid models combining wellness, recovery, and functional training - only 24% remain traditional gyms.

2026 Survey Findings for UAE

Exercise 4+ times per week	52%
Aspire to be healthier	94%
Health improved vs. last year	66%
Aspire to improve mental health	90%
First-time gym-goers (GymNation)	42%

GYMNATION'S ROLE IN SUPPORTING BOTH VISIONS

Operating across both KSA and the UAE, GymNation is uniquely positioned to support both nations' fitness and wellbeing objectives:

GymNation's alignment with national priorities:

National Priority	GymNation's Contribution
Affordable Access	Our low cost, pay monthly pricing removes cost as a barrier - 50% say affordability would encourage more exercise.
Market Expansion	51% of our members are first-time gym-goers, converting sedentary individuals into active participants.
Women's Participation	Ladies-only areas ensure culturally appropriate fitness access. 46% of women consider these spaces essential.
Mental Wellbeing	With 93% of respondents prioritising mental health, our facilities support both physical and psychological wellbeing.
Community Building	Group classes and gym-floor challenges foster social cohesion. 31% have formed meaningful relationships at the gym.
Infrastructure	Our growth across the GCC contributes to the nationwide fitness infrastructure envisioned in both countries' strategies.

By maintaining affordable pricing, expanding geographic reach, and focusing on first-time gym-goer conversion, GymNation serves as an accelerator for both nations' health transformation agendas - turning policy ambitions into measurable participation gains.

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