

GFX GLOBAL FITNESS EXPO

IEG MIDDLE EAST

UAE HEALTH & FITNESS INDUSTRY REPORT

2026

The second edition of the industry-led view of the UAE fitness market, built on three independent surveys of residents, operators and fitness professionals.

COLLABORATION IN PRACTICE

The UAE Health and Fitness Industry Report 2026 was commissioned by IEG Middle East and developed through a Memorandum of Understanding (MoU) between the UAE Sports Science and Sports Medicine Training Center, the Emirates Bodybuilding and Fitness Federation (EBBF), IEG Middle East and Qantara Sports.

Bringing together government expertise, industry leadership and independent research, this partnership delivers valuable market intelligence and consumer insights to support informed decision-making, encourage investment and strengthen collaboration.

The report reflects a shared commitment to advancing the UAE's health and fitness sector and supporting its long-term growth in alignment with national priorities.

COLLABORATING FOR INDUSTRY GROWTH

مركز الإمارات للعلوم الرياضية والطب الرياضي
UAE Sports Science & Sports Medicine Center

EBBF
اتحاد الإمارات لبناء الأجسام واللياقة البدنية
EMIRATES BODYBUILDING & FITNESS FEDERATION

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QANTARA SPORTS

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OPENING ADDRESSES



H.E. GHANIM MUBARAK AL HAJERI

Under Secretary of the UAE Ministry of Sports
Chairman of the Board, UAE Sports Science and Sports Medicine Center

Sport, health and fitness are no longer individual pursuits or separate industries. Together they shape a healthier society, a stronger economy and a better quality of life.

Our ambition in the UAE goes beyond getting more people to move. We want a sustainable sports and fitness ecosystem that creates opportunities, attracts investment and delivers lasting benefit to our communities.

Reaching that goal calls for three shifts: from assumptions to evidence, from data to informed decisions, and from separate efforts to partnerships that deliver results. The UAE Health & Fitness Industry Report 2026 grows out of this thinking. It reads the sector as it stands and gives decision-makers, operators and investors facts they can act on.

It arrives at a time when the meaning of well-being is changing quickly.

Public interest has widened from physical fitness to sleep, recovery, mental health and nutrition, while wearables, digital platforms and artificial intelligence are reshaping how individuals track their health and choose their services. Health systems worldwide are turning toward prevention rather than treatment alone, and the cost of physical inactivity to individuals and economies continues to rise. In this setting, the sports and fitness sector is a real partner in public health. That role depends on reliable data, read with sound methodology and respect for individual privacy, then translated into standards, qualified professions and services that keep pace with the change.

The UAE Sports Science and Sports Medicine Center treats this subject as part of its work in scientific and knowledge output. The Center strengthens research and studies that examine the sports sector in all its forms and disciplines, linking scientific evidence to market needs and community priorities. Its contribution to this report follows that approach: reliable knowledge is what allows standards to be set, professionals to be qualified, services to be developed, and government entities, investors and operators to decide with confidence. The Center will continue working with its partners so that research findings become practice that raises the quality of the sector and serves people.

This report was shaped around one table, where government, industry leaders, investors and partners sat together to chart the future of health and fitness in the country. We see it as a first step on a continuing path, in which knowledge turns into policies, services and investments that serve people.

We thank our partners, the Emirates Bodybuilding and Fitness Federation, IEG Middle East and Qantara Sports, for the collaboration that made this work possible. We also thank everyone who contributed data, views and time.

We hope readers find in this report what they need to decide with greater precision, and that it stands as an open invitation to every party in the sector to join this shared effort.



H.H. SHEIKH ABDULLAH BIN HAMAD BIN SAIF AL SHARQI

President of the Emirates Bodybuilding and Fitness Federation (EBBF)

The health of a nation is built through the choices we make today and the opportunities we create for generations to come. In the UAE, sport and fitness are part of that responsibility: an investment in our people, our economy and our future.

Our nation's ambition is reflected in the lives we help people lead. Every person who gains the confidence to become active, every professional who raises the quality of their work, and every community with better access to sport contributes to a stronger, healthier UAE. Creating the conditions for that progress is a responsibility we share.

As the health and fitness sector grows, ambition must be matched by understanding. We need to know who is participating, what prevents others from taking part, where services are needed and how the industry can develop responsibly. Reliable evidence helps us ask better questions, direct resources wisely and recognise opportunities that might otherwise remain unseen.

The UAE Health & Fitness Industry Report 2026 is an important contribution to that understanding. It provides a shared foundation from which government entities, industry leaders, professionals and investors can assess the market and make informed decisions. Its value will be realised through the action it encourages and the improvements that follow.

At the Emirates Bodybuilding and Fitness Federation (EBBF), we see leadership as a commitment to bringing people and institutions together around a clear purpose. Our role is to support the development of a sector that earns public confidence, creates opportunities for qualified professionals and makes participation more accessible across our communities.

Professional standards are central to this work. People should be able to place their trust in the knowledge, competence and care of those who guide them. Supporting education, encouraging continuous professional development and strengthening cooperation across the industry are essential to improving the quality and consistency of the services people receive.

Equally, the future of fitness must make room for everyone. From those taking their first steps towards an active lifestyle to experienced athletes pursuing excellence, people need opportunities that reflect their abilities, circumstances and aspirations. A successful sector welcomes that diversity and helps participation become a lasting part of everyday life.

Achieving this requires partnerships with purpose and continuity. Government, research institutions, businesses and community organisations each bring expertise that becomes more valuable when connected to a shared ambition. This report demonstrates what such cooperation can produce and provides a basis for taking that work further.

We thank the UAE Sports Science and Sports Medicine Center, IEG Middle East and Qantara Sports for their partnership, and everyone who contributed their knowledge and experience to this undertaking.

Our responsibility now is to carry this work forward: to translate insight into better practice, investment into wider opportunity, and shared ambition into measurable progress. Together, we can build a sports and fitness sector whose success is reflected in healthier lives, stronger communities and lasting value for the UAE.

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- OTHER LOCATIONS

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- 12 - 15
ABILMENTE AUTUNNO TORINO
Lingotto, Turin
www.abilmente.org/en/turin
- 13 - 15
PALAKISS FALL
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- 14 - 15
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www.fieredelfumetto.it/vicenza-comics-games
- 17 - 19
REMODULA EXPO
www.exporemodula.com
- 18 - 20
SMART TECHNOLOGY EXPO
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FEBRUARY

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IEG MIDDLE EAST: LEADING WITH PURPOSE

GFX







At Italian Exhibition Group, we recognise that sustainable industry growth must be supported by credible data, informed decision-making and meaningful collaboration.

Our investment in the 2026 UAE Health and Fitness Industry Report reflects our commitment to advancing the sector beyond our exhibition platforms. By addressing the need for reliable market intelligence, we aim to give businesses, investors and policymakers greater visibility into the opportunities shaping the UAE's fitness landscape.

Through this initiative, we are proud to support the sector's long-term development and strengthen the UAE's position as a leading global health and fitness market.

Francesco Santa
CEO, IEG Middle East

The UAE's health and fitness industry has experienced significant growth over the past decade, driven by ambitious government initiatives, increasing consumer demand and sustained private sector investment.

The 2026 UAE Health and Fitness Industry Report provides an important opportunity to measure that progress, understand the forces driving market growth and identify where future opportunities lie.

As international brands increasingly look to the UAE for expansion and homegrown businesses continue to scale, access to credible market intelligence has never been more important. This report provides the insights needed to support informed investment, strategic decision-making and the sector's continued development.

Rachel Chatham
Managing Director, IEG Middle East

Across the UAE and wider GCC, ambitious national strategies are creating significant opportunities for investment in health, fitness and wellness. Government commitments to healthier populations, economic diversification and private sector growth are establishing a strong foundation for long-term market expansion.

The 2026 UAE Health and Fitness Industry Report provides valuable intelligence to help businesses and investors understand this evolving landscape and capitalise on emerging opportunities. By connecting market data with regional ambitions, we aim to support informed investment decisions, encourage international participation and accelerate commercial growth across the wider sector.

Gavin Baxter
Commercial Director, IEG Middle East



CONTENTS AND HOW TO USE THIS REPORT

HOW TO READ THIS REPORT

This report is based around three perspectives on the UAE health and fitness sector - consumers, operators, and fitness professionals - so that the same topic can be read from more than one point of view rather than reduced to a single statistic. Each perspective comes with its own sampling constraints and limitations, set out in full in the methodology section, and these are respected throughout: where a section includes an operator and a consumer figure, it presents two views on the same issue rather than directly comparable data. Together, the three perspectives are intended to paint a rounded picture of the landscape of the UAE health and fitness sector. This 2026 edition also marks a step forward from the initial report by incorporating, for the first time, the direct feedback of fitness professionals alongside the consumer and operator voices.

CONSUMER SURVEY

4,062 UAE residents aged 18 and over, interviewed online in August 2026 by YouGov and weighted to the national adult profile. It covers who holds a membership, who does not, and the reasons given. Consumer figures describe all residents, not only gym members.

OPERATOR SURVEY

122 gym and fitness facility operators reporting on their own businesses: format, pricing, revenue, retention, workforce, and outlook. The survey was distributed by direct email communication and through research partners. These figures are self-reported and describe the operators who took part, and their answers may not include all questions. Because no single national listing of operators was available, the invitation list was compiled for this report from the different emirate licence registers (page 07).

PROFESSIONAL SURVEY

308 fitness professionals, reached through Dubai Active Industry, EBBF and the REPs UAE register, and presented in a consolidated report. This is the first edition of the report to survey the workforce directly. It is a convenience sample, so findings are indicative.

122

Gym and fitness facility operators reporting on their own businesses

308

Fitness professionals, reached through Dubai Active Industry, EBBF and the REPs UAE register

4,062

Residents aged 18 and over, interviewed online in August 2026 by YouGov

FOREWORD

When the industry published its first UAE Health and Fitness Report in 2025, the aim was to produce a report for the sector, by the sector, based on what operators see every day. Forty-five operators shared their data, and the response told us the market wanted a common evidence base.

This second edition widens the evidence base. For the first time it includes a nationally representative survey of more than four thousand residents, a survey of operators, and a survey of the professionals who deliver fitness on the gym floor. The picture is more complete, and in places more challenging. Six in ten UAE adults do not hold a membership today, yet most of them would consider one. This gap is the main growth opportunity for the industry.

Assembling that evidence remains harder than it should be. The UAE has no single listing of fitness facilities, so the research team built one from the licence registers and directories of six emirates. It holds 1,682 active gym and fitness licences. 122 operators shared their data this year, more than twice as many as in 2025, but still a minority of the market. Benchmarks become more useful to every operator as more of the market contributes, and the working group's confidentiality protocols are designed to make that sharing safe.

The findings also ask harder questions about price, crowding, retention and how we look after our workforce. They are offered in the same spirit as last year: to help every operator, investor and policymaker make better decisions, and to support the national ambition for a more active UAE.

Our thanks go to every operator, professional and resident who took part, and to our research partners.

THIS REPORT IS ONLY AS USEFUL AS THE DATA BEHIND IT. IN 2026, 122 OPERATORS TOOK PART AGAINST 1,682 ACTIVE GYM AND FITNESS LICENCES, THE FACILITY LISTING HAD TO BE COMPILED FROM SEPARATE EMIRATE REGISTERS, AND NO LISTING WAS AVAILABLE FOR RAS AL KHAIMAH. COMPARABLE RESULTS FOR EVERY EMIRATE, AND THE FIRST TRUE YEAR-ON-YEAR COMPARISON IN 2027, DEPEND ON GOVERNMENT AND INDUSTRY AGREEING NOW ON HOW THE NEXT EDITION WILL BE SUPPORTED. WE THEREFORE INVITE THE FOLLOWING COMMITMENTS.

Government and licensing authorities

- Share an annual list of licenced fitness facilities in all seven emirates, with business contact details, under a data-sharing agreement with the research team.
- Agree on a common way of classifying fitness licences across emirates, so that gyms, studios, community facilities, and personal coaching licences are counted in the same way everywhere.
- Endorse the 2027 survey invitation through official channels, so that licence holders receive it from a source they recognise.
- Use the report's indicators, such as membership by emirate and workforce conditions, alongside existing measures of progress towards the National Sports Strategy 2031 participation target.

Operators, federations and professional bodies

- Share anonymised attendance, renewal, and pricing data through a secure template, so that the main findings can be tested against observed behavior as well as survey answers.
- Circulate the professional survey through registers, federations, and employers, so that the workforce is represented in every emirate rather than mainly in Dubai.
- Bring developer-run and community gyms into the survey. They are the main facility for 6% to 11% of current members but are rarely counted as operators.

What contributors receive

Every operator that contributes data will receive a confidential benchmark report, prepared by the research team at Qantara Sports, comparing its results with peers of a similar format, price band, and emirate. Individual responses are never published or shared. Results are reported only in aggregate, and no figure is shown for a group too small to protect anonymity. Contributors also receive first access to the headline findings and are acknowledged in the report unless they prefer not to be named.

INDUSTRY VOICES



DR ZIAD SALEH

Board Member and acting CEO, UAE Sports Science and Sports Medicine Center

Behind every figure in this report stands a person who decided to move: a young woman starting her first training programme, a father rediscovering his pace, a retiree choosing to stay strong. Numbers matter because they describe these lives, and this report listens to them across the country.

The report came out of a partnership formed under a memorandum of understanding, the first of its kind in this field. The UAE Sports Science and Sports Medicine Center is proud to have been a major contributor and to stand in it as the government representative, bringing the viewpoint of sports science and sports medicine: that training only delivers its promise when it is safe, well guided and suited to the person doing it.

A single report cannot answer every question, and it was not meant to. Its value is as a starting line. Repeated over the years, it will show whether participation is widening, whether practice is becoming safer, and whether coaches keep pace with those they guide.

The Center will keep bringing its efforts to this partnership, from scientific research and careful measurement to the training of coaches and practitioners, so that each future edition rests on firmer evidence and asks better questions than the last. We look forward to widening the circle: more voices, more regions, more sports, and more of the people whose daily choices this report tries to understand. Our hope is that every edition tells a fuller story than the one before it, and that those who read it, whether they run a facility, coach a team or simply decide to begin, find in it something that makes their next step safer and surer.



CATHERINE HANSON FARID

Director of Operation, REPs UAE

An encouraging finding in this report is that 85% of RepsUAE members and 76% of all respondents strongly support mandatory professional standards. For REPs UAE, this confirms that fitness professionals value accredited qualifications, verified competence, and ongoing education to protect the public and enhance industry credibility. Notably, 58% state that enforcement remains weak, highlighting the need for consistency.

We must collaborate with government, employers, and educators to support qualified professionals and ensure they maintain current skills and first aid throughout their careers. Ultimately, these findings reinforce the necessity of enforcing standards and providing accessible support.



LOREN HOLLAND

Founder & CEO, GymNation

The UAE and wider GCC health and fitness industry presents significant opportunities for growth and investment. At GymNation, our rapid expansion reflects growing demand for accessible, affordable fitness. Our 2026 UAE & KSA Report found that 51% of members had not held a gym membership in the previous 12 months, highlighting the potential to attract new consumers.

The UAE Health & Fitness Industry Report 2026 provides valuable insights to guide investment, address participation barriers and support national physical activity goals. Our greatest opportunity is not simply building more gyms, but bringing more people into fitness.



JASON TUBBS

Senior Vice President, Fitness First Middle East

The UAE's health and fitness industry is entering an exciting period of growth, but sustainable progress requires a deeper understanding of evolving consumer needs and barriers to participation. At Fitness First, we recognise the importance of adapting to changing training preferences, digital innovation and growing demand for personalised wellness experiences.

The UAE Health and Fitness Industry Report 2026 provides valuable insights to guide investment, enhance member experiences and encourage greater industry collaboration By supporting informed decisions and a collective approach, we can drive sustainable growth and contribute to a healthier, more active UAE.



HALA ALURAIBI

CEO, FitRepublik & StudioRepublik

In a country moving as quickly as the UAE, our understanding of the market needs to keep pace. New communities are taking shape, expectations are evolving.

At FitRepublik and StudioRepublik, we've spent twelve years developing our own platform to understand our members and serve them better. That experience has reinforced my belief in data-informed decisions.

A UAE-centric industry report can bring that understanding to a wider scale. Combining operator insights with demographic and development information can help us identify underserved communities, anticipate demand and invest with greater confidence.

The value of shared research is in how we use it.



EXECUTIVE SUMMARY: TEN FINDINGS THAT DEFINE 2026

1.

SEVEN IN TEN NON-MEMBERS WOULD JOIN OR RETURN.

Only 39.9% of UAE adults currently hold a membership; 28.9% have lapsed and 31.2% have never joined. Yet 71.9% of non-members say they would join or return, a potential customer pool larger than the existing member base.

2.

MEMBERSHIP IS LOWER OUTSIDE DUBAI AND ABU DHABI.

Consumer reported membership runs at 47.1% in Dubai and 42.2% in Abu Dhabi, against 31.5% in Sharjah and 28.2% in other emirates. Between 69% and 74% of non-members in each emirate would join or return, Sharjah and the Northern Emirates together hold 44% of them. Members in these emirates are also more likely to pay under AED 200 a month emirates, compared to 37% in Dubai and 28% in Abu Dhabi.

3.

NEW ARRIVALS TO THE UAE ARE SLOW TO JOIN.

57.0% of residents in their first year in the UAE have never held a membership here. Membership rises steadily with time in the country, which suggests the industry converts newcomers gradually.

4.

HALF OF MEMBERS SAY A 10% PRICE RISE WOULD LIKELY MAKE THEM LEAVE.

49.9% of current and former members say a 10% increase would likely make them cancel or switch. Sensitivity is similar in every price band, from under AED 200 to over AED 1,000, which questions actual impact.

5.

PROSPECTIVE MEMBERS EXPECT TO PAY LESS THAN MEMBERS PAY TODAY.

55.1% of non-members open to joining think a reasonable fee is under AED 200 a month. Only 30.7% of current and former members pay that little. This points towards establishing a lower entry rate rather than price cuts for existing members.

6.

MEMBERS FUNDED BY THEIR EMPLOYER ARE THE MOST LIKELY TO LEAVE.

Members whose employer pays the full fee make up 42.6% of members but 61.4% of those planning to leave. No other factor measured has a stronger link with intention to leave.

7.

SEVEN OPERATORS IN TEN RENEW HALF THEIR MEMBERS OR FEWER.

The largest group renews between 41% and 50% of members each year, and only two operators report renewal above 80%. Members in the consumer survey voice the same way: four in ten say they are likely to cancel or switch within six months.

8.

RISING COSTS ARE THE MOST URGENT CHALLENGE OPERATORS FACE.

A third of operators rank rising costs first, more than twice the share choosing any other challenge. Competition is the most widespread concern, placed in the top five by nearly eight in ten.

9.

PROFESSIONALS INTEND TO STAY IN THE INDUSTRY, BUT MANY EXPECT TO CHANGE EMPLOYER.

Eight in ten fitness professionals expect to still be working in fitness in five years, and only 1.6% plan to leave the industry, yet one third say they are likely to leave their current employer within a year. Operators name personal trainers as the hardest role to fill (60.3%). This points to staff rotation between businesses, not professionals leaving the profession.

10.

OPERATOR REVENUE FELL OVER THE PAST YEAR, BUT MOST OPERATORS EXPECT GROWTH.

47% of operators saw revenue fall over the past 12 months, and 73.8% say regional tensions affected their operations. Even so, 65% expect revenue to grow over the next 12 months, and only 7% expect a further decline.

THE YEAR IN NUMBERS – 2025 VS 2026 AT A GLANCE

HOW THE 2025 AND 2026 EDITIONS DIFFER

The 2025 edition was the first industry-led research into the UAE fitness market. Initiated by the Dubai Active Industry working group, the inaugural report aimed to set a baseline for the industry complementing existing reports such as GymNation's and the Global Wellness Institute's amongst others. The 2026 edition has a federal reach and uses a different survey design, which affects how figures can be compared between the two years.

The largest change is in consumer research. In 2025, 807 consumers were recruited through fitness facilities, so 92.3% were current gym members and 65.3% lived in Dubai. In 2026, 4,062 residents were interviewed through a national online panel and weighted to the adult population, and 39.9% are members. The difference between 92% and 40% reflects who was surveyed rather than a change in the market. For this reason, no consumer figure in this report is compared with 2025. The 2026 consumer results are a baseline that the 2027 edition can track.

The operator sample also changed. In 2025, 45 operators responded, including three enterprise operators that together held 72% of the members represented. In 2026, 122 responded, and 82.0% run four sites or fewer, representing a substantial increase in responses from independent and small operators. Geographically, due to the availability of contact details, the 2026 sample is also weighted towards Abu Dhabi (50.8% operating against 36.9% in Dubai). Among larger operators in 2026 (five or more sites, or more than 1,000 members; 30 answered the revenue question), revenue fell for 50.0%, almost the same as for smaller operators. This suggests the weaker year is not only a result of the respondent mix.

The professional survey is new in 2026. Distribution through collaboration with REPS UAE and EBBF amongst others, has helped capture different demographics and geographical areas.

SURVEY RESPONSES FROM OPERATORS AND DISTRIBUTION IN 2025 AND 2026

The 2026 operator sample has more small operators and is weighted towards Abu Dhabi, so part of any change reflects the wider profile of respondents.

Market Position	2025	2026
Operators Responding	45	122
Budget / Low-Cost	7%	13.1%
Mid-Market	43%	33.6%
Premium Luxury	22%	20.5%
Boutique Studio	13%	11.5%
Specialty	n/a (category added in 2026)	6.6%
High Value Low Cost	15%	15.8%

Sources: UAE Health & Fitness Report 2025; Operator Survey 2026.

METHODOLOGY, SAMPLE AND GEOGRAPHIC COVERAGE

CONSUMER SURVEY

4,062 UAE residents aged 18 and over, in all seven emirates, interviewed online through the YouGov panel in August 2026. Results are weighted to the national adult profile. On the full sample, the margin of error is about ±1.6 percentage points at 95% confidence.

OPERATOR SURVEY

122 gym and fitness operators answered an online survey between 17 August and 30 September 2026. Each answered for its whole UAE business, so results are counted per operator, not per site. No national register of fitness facilities exists, so the invitation list was compiled for this report from emirate licence registers.

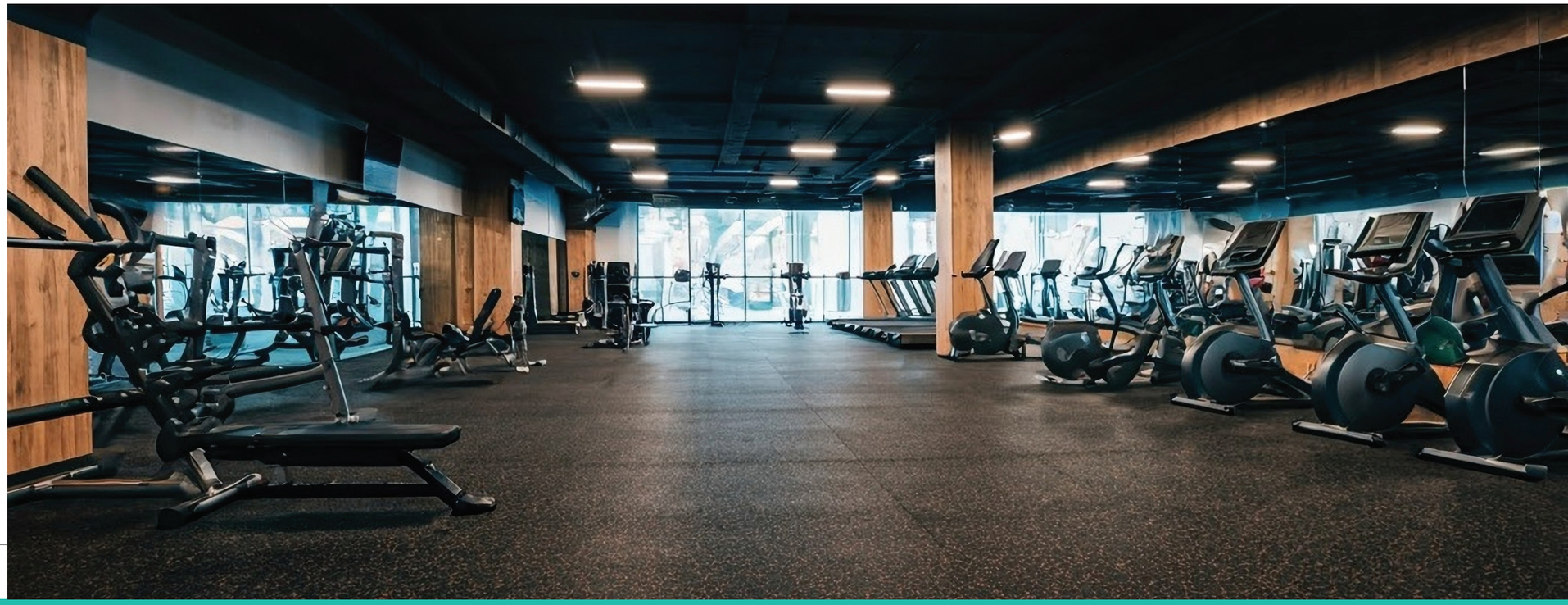
Fewer operators answered as the survey went on: 122 for the business profile, 94 for financial performance, 70 for investment and outlook, and 54 for the challenge ranking. Questions on staff education and REPs UAE registration were answered by 45 operators. Revenue and renewal figures cover operators trading for a year or more. Boutique studios are compared with operators running four sites or fewer.

PROFESSIONAL SURVEY

308 fitness professionals answered an online survey: 232 were reached through Dubai Active Industry and EBBF between 17 August and 8 October 2026, and 76 through the REPs UAE register between 9 and 28 September 2026. Both groups answered the same questions and are reported together. Thirteen test or duplicate responses were removed.

READING THE RESULTS

Operator and professional results are not weighted, because no reliable count of either population exists. They describe the businesses and people who took part. Every chart states its base. Results from fewer than 100 respondents should be read as indicative, and results from fewer than 30 are shown as counts. Percentages may not sum to 100 because of rounding or because more than one answer was allowed.



LIMITATIONS, ETHICS AND EXTERNAL VALIDATION

SCOPE AND LIMITATIONS OF THE DATA

Three points apply across the entire report. First, the consumer survey measures what residents say: their intentions, preferences, and recollections. When 49.9% say a 10% price rise would likely make them leave, this indicates how exposed the market is to price increases. It is not forecasting how many members will leave. Members who switch usually move to another facility rather than stop exercising, and may consider other factors such as proximity before leaving, ultimately leading them to stay.

Second, no consumer figure is compared with the 2025 edition. The 2025 consumer survey was recruited through gyms and was made up almost entirely of members. The 2026 survey represents all residents. A comparison would mainly reflect the change in method.

Third, operator figures on revenue, renewal rates, pay, and workforce are reported by operators themselves and have not been audited. They are collected in bands to protect confidentiality and are reported only in aggregate. The six-month outlook was asked only of operators affected by regional tensions, 53 of 70. Questions on staff education support and REPs UAE registration were added part-way through fieldwork and were answered by 45 of the 70 operators who completed the survey after that point. Both are reported on their own bases. The operator sample covers roughly one in five active licenced facilities and was drawn from a listing compiled for this report (page 07), so it is not a complete census of the market. The professional survey is a convenience sample and should be read as directional.

DATA PROCESSING

All three surveys were processed combining spreadsheet calculations and Python. The scripts removed test and duplicate responses (13 in the professional survey) and de-duplicated licence records by licence number. Every figure in the report was checked against the source files before publication. The processed data also feeds a set of dashboards, one for each area of analysis (membership, usage and goals, barriers, spend and churn risk, service gaps, segments, operators, and workforce), which the report team used to review results.

ETHICS AND CONFIDENTIALITY

All three surveys were voluntary and anonymous. No individual operator, facility or respondent can be identified in this report. Consumer panel members took part under YouGov's standard consent terms. Operator data is held by Dubai Active Industry under the confidentiality protocols agreed with the working group, and benchmark outputs use only groups large enough to protect individual businesses.

EXTERNAL VALIDATION

Qantara Sports carried out the analysis and validation independently of the operator working group. Consumer fieldwork and weighting were run by YouGov. The professional survey was conducted with Dubai Active Industry, EBBF and REPs UAE. External figures used for context are attributed to their sources wherever they appear.

THE UAE HEALTH AND FITNESS MARKET IN 2026

POPULATION GROWTH

Operators are trading in a population that is still growing quickly. Dubai passed 4.8 million residents in September 2026, 226,885 more than at the start of the year (Dubai Data and Statistics Establishment, 2026). Abu Dhabi reached 4.14 million at the end of 2024 after 7.5% growth in a year (Statistics Centre Abu Dhabi, 2025). Most new residents are working-age expatriates. As the consumer survey shows, this group joins gyms slowly in its first years in the country, so every year of strong arrivals adds to the pool of future members.

SOCIO-DEMOGRAPHIC PROFILE ACROSS THE SEVEN EMIRATES

Population is concentrated at the top of the market. Dubai and Abu Dhabi, at 4.81 million and 4.14 million residents respectively, together account for most of the national total, while Sharjah is the third-largest emirate at 2.14 million residents, around 19% of the UAE population and up 51% over the past decade (Government of Sharjah, 2025). The four northern emirates — Ajman, Ras Al Khaimah, Fujairah, and Umm Al Quwain — are smaller individually but growing quickly off a lower base; consistent official per-emirate figures are not published for all four, so combined totals should be treated as indicative pending confirmation. For operators, this means Dubai and Abu Dhabi remain the largest addressable markets, while the northern emirates are the least penetrated and increasingly targeted by new investment.

NATIONAL POLICY ON PARTICIPATION

The National Sports Strategy 2031 aims for 71% of the population to take part in sport regularly, supported by 17 national initiatives (UAE Government portal). The National Policy for Promoting Healthy Lifestyles (2022) and Dubai Sports Council's 2023–2033 roadmap have similar aims. About two thirds of residents do not reach the recommended 150 minutes of moderate activity a week (World Obesity, 2022).

The Dubai Fitness Challenge illustrates the scale of public participation. The 2025 edition drew over 3 million participants, up from 2.7 million in 2024, with over 307,000 runners at Dubai Run and a record 40,327 cyclists at Dubai Ride (Dubai Media Office, 2025). Abu Dhabi summer sports activations and community hubs initiatives also broaden the participation base.

TRADING CONDITIONS

Trading conditions were more difficult in 2026. Developers increasingly run their own fitness brands, and occupancy and staffing costs keep rising. The 2026 operator survey also asked, for the first time, how regional tensions affected trading. 73.8% of operators reported an effect. Most responded with discounts or pricing changes (57.8% of those affected), and two thirds of affected operators (66.7%) see a negative outlook for the next six months.

TRANSFORMATION ACROSS THE EMIRATES: HOSPITALITY, RESORTS AND LEISURE INVESTMENT

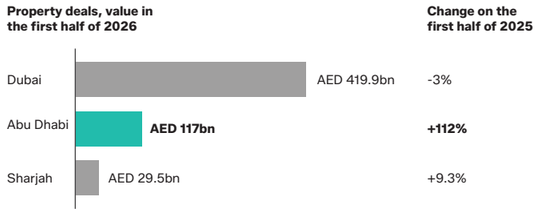
The last twelve months have reshaped the leisure and hospitality map outside Dubai. In Ras Al Khaimah, Colliers International projects a 51% expansion of the emirate's hotel room inventory by the end of 2026, alongside the under-construction Wynn Al Marjan Island integrated resort and major renovations at established properties such as Pullman Resort Al Marjan Island and Rixos Al Mairid (RAK Tourism Development Authority, 2026). Master developer Marjan's 85 million sq ft Marjan Beach masterplan alone will add 22,000 homes and 12,000 hotel rooms (Marjan, 2025). Sharjah welcomed more than two million hotel guests in 2025, generating AED780 million in revenue (Sharjah Commerce and Tourism Development Authority, 2025), opened the Dh700 million Khor Fakkan Resort in May 2026, and is targeting growth in tourism's contribution to GDP from AED200 billion in 2023 to AED450 billion by 2031. In Abu Dhabi, Miral announced a further AED12 billion ($3.3 billion) five-year investment in Yas Island's attractions and hotels in September 2026, on top of the previously announced Disney theme park resort and the Guggenheim Abu Dhabi, due to open in Saadiyat Cultural District in December 2026. Taken together, this investment is expanding the population and visitor base available to operators outside Dubai, while reinforcing the developer-led ownership model already reshaping the sector.

REAL ESTATE & WELLNESS DEVELOPMENTS

Real estate developers include health and fitness facilities as core anchor assets to gain positioning as lifestyle and longevity destinations. Furthermore, some developers transitioned from landlords to operators.

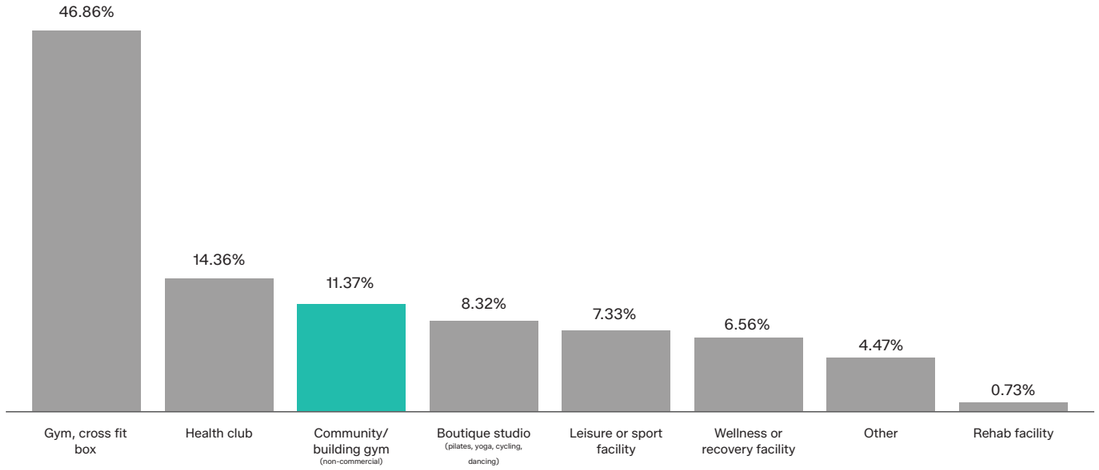
Across Abu Dhabi, Dubai and Sharjah, developers are putting gyms, clinics and sports clubs into homes, hotels and leased public land. Some run their own gym brands. For operators and equipment suppliers, each new development project is a sales lead and a possible rival at the same time.

Abu Dhabi's property deals more than doubled in early 2026 while Dubai remains the largest market



Source: Dubai Land Department, Abu Dhabi Real Estate Centre and Sharjah Real Estate Registration Department, first half of 2025 and 2026.Source: DAI 2026 consumer survey

Community gyms are the main gym for 11% of current members with slight change by emirate.



FOUR WAYS DEVELOPERS AND OPERATORS WORK TOGETHER

Arrangement	What it means for operators	UAE example
Developer runs its own gym brand	The developer owns the brand and the customers. It competes with independent gyms on its own sites and elsewhere.	Emaar's VEO in Dubai. Arada's Formative group in Dubai, Abu Dhabi and Sharjah (Emaar, 2024; Arada, 2025).
Operator runs the developer's gym for a fee	The operator brings staff and classes. The developer keeps the building and the residents, and decides whether to renew.	Fitness First ran Emaar's four community clubs from 2012. Those four places now carry Emaar's VEO brand (Arabian Business, 2012; Emaar, 2024).
Developer works with a health provider	Medical know-how joins the plans before handover, ahead of any gym operator.	Aldar and PureHealth in Abu Dhabi, July 2026 (Aldar and PureHealth, 2026).
Government leases land to an operator	The operator builds and runs the site under a Musataha. This is a long lease with the right to build on the land.	Abu Dhabi's Sports Council gave Sama Emirates a 32-year lease for Mohammed Bin Zayed City in October 2025 (Abu Dhabi Sports Council, 2025).

WHAT IS BEING BUILT

Abu Dhabi is the biggest upcoming market. The emirate will add 71,000 homes by 2030, and 2028 is the busiest year of all (ADREC, 2026). Ten developers account for 90% of sales of unbuilt homes, creating a highly concentrated market. Aldar offers lifestyle destinations with a sport and fitness focus, Sei Saadiyat has gyms and a clinic, while Fahid Island is planned as a wellness island with Fitwell health certification. Two of the largest developments are ORA's 100,000 square meter club at Bayn and Modon's expansion of 321 Sports on Hudayriyat (ORA, 2026; Modon, 2026). Arada and its Formative group runs more than 20 clubs and wants to reach 40 by 2027 (Arada, 2026).

Hotels are developing slowly across the UAE. In Ras Al Khaimah Wynn Al Marjan Island has been announced for September 2027. Hotels in RAK were 33.6% full in June, against 65.2% in Abu Dhabi (JLL, 2026), so renovation should take priority to new build. La Mazzoni, on Al Marjan island, is near-term, with over 11,000 square feet of fitness and wellness space (The Luxe Developers, 2025).

WHAT THIS MEANS FOR OPERATORS

A developer-operated gym enters the market with structural advantages that an independent operator must earn over time: a high-footfall location, established brand recognition, and often direct access to residents in the building above. The developer also retains control over lease renewal. Survey data quantifies the appeal of these in-building facilities: among members considering a switch, 16% would move to a residential gym, a proportion comparable to the pull of a lower-cost gym (14%) or a premium gym (13%).

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Members rarely quit a gym. They quit when they stop **seeing progress.** Visbody AI makes every body measurable — in 3D, in minutes — so your coaches sell with evidence, and your members stay for the story their data tells.

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3D BODY ASSESSMENT MIRROR
The first-visit moment members share.
- **Instant 360° 3D** body model
- **18** composition metrics
- **14** circumferences
- **10** posturechecks
- Multi-frequency BIA + AI report by Visbody AI × DeepSeek

02 — CONVERT
Visbody T55
4D INTELLIGENT ASSESSMENT
Evidence that sells Personal Training.
- **AI Functional Movement Screening**
- Structure, balance, strength & flexibility in **one profile**
- Stereo vision + 8-electrode BIA

03 — RETAIN
Visbody Creator600
AI SMART TREADMILL
The run they can't get anywhere else.
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- **13** real-time form analyses
- AI anti-fall safety · 4K 50" display
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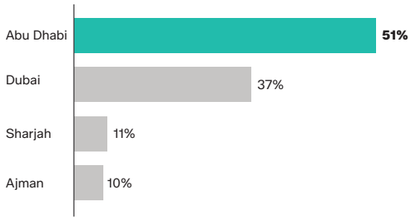
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FACILITY LANDSCAPE BY EMIRATE

HALF OF OPERATORS RUN A SITE IN ABU DHABI

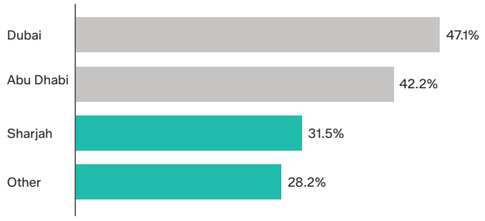
Half the operators in this survey hold at least one site in Abu Dhabi, and over a third hold a site in Dubai. Sharjah follows at about 11% and Ajman at one in ten. No other emirate reaches 6%.



Responses: 122 operators. More than one emirate could be selected.

MARKET PENETRATION: RESIDENTS OUTSIDE DUBAI AND ABU DHABI ARE LEAST LIKELY TO HOLD A MEMBERSHIP

Considering the consumer report among residents, membership runs at 47% in Dubai and 42% in Abu Dhabi, then falls to around 30% in Sharjah and the other emirates. Dubai holds 44% of adults but 52% of current members.



Responses: 4,062 UAE residents.



Members outside Dubai and Abu Dhabi also pay less. 37% pay under AED 200 a month, against 28% in Dubai and Abu Dhabi. Together, Sharjah and the Northern Emirates hold 44% of the non-members who would join or return, more than Dubai at 37%.

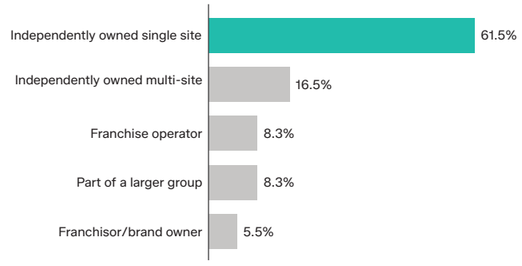
Sharjah and the Northern Emirates trail on both measures. Fewer operators in this survey run sites there, and fewer residents hold a membership. Abu Dhabi is the exception, with the most operators here and lower membership than Dubai.

Sharjah members are the least likely to plan to leave, 33% against 43% elsewhere, and the least likely to have an employer paying in full.

OPERATOR SURVEY SNAPSHOT

SIX OPERATORS IN TEN RUN A SINGLE SITE THEY OWN

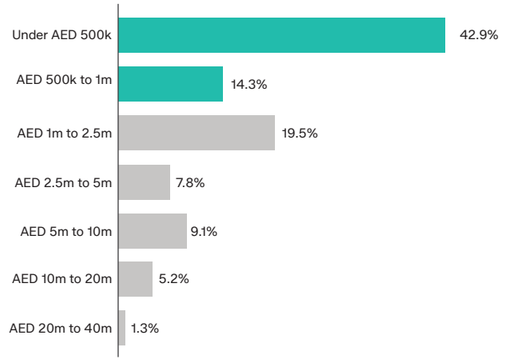
Six operators in ten run a single, independently owned site. Around one in six run several sites of their own. The remaining quarter are franchise businesses or part of a larger group.



Responses: 122 operators.

Respondents represented independent operators, fewer than one in ten ran ten sites or more, and 82% ran four or fewer.

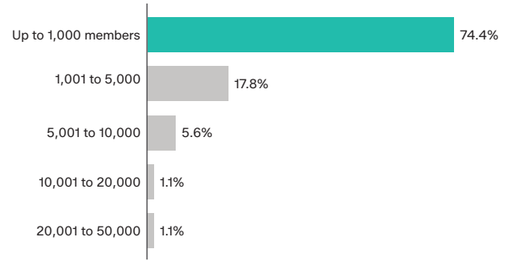
MOST OPERATORS TURN OVER LESS THAN A MILLION DIRHAMS



Responses: 85 operators trading for a year or more.

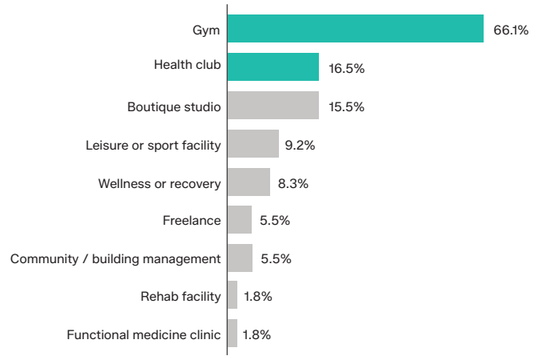
Annual UAE revenue sits under half a million dirhams for 40% of operators. Add the band above and just over half fall below a million. Seven businesses report more than ten million, which makes any market average figure misleading.

SEVEN OPERATORS IN TEN SERVE FEWER THAN 1,000 MEMBERS



Responses: 103 operators.

GYMS DOMINATE, AND SEVEN IN TEN OPERATORS HAVE TRADED THREE YEARS OR MORE

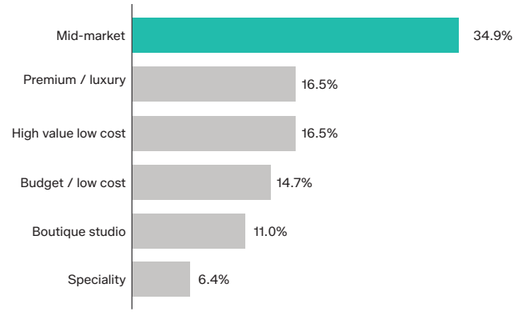


Responses: 122 operators. More than one type could be selected.

Nearly two thirds operate a gym. Health clubs follow at one in six, with boutique studios close behind at nearly one in five. Seven operators in ten have traded in the UAE for three years or more, and fewer than one in ten opened within the past twelve months.

MARKET STRUCTURE AND POSITIONING

A THIRD CALL THEMSELVES MID-MARKET

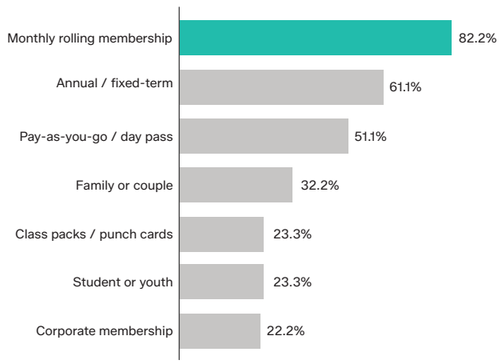


Responses: 122 operators.

Mid-market is the most common self-description, chosen by a third. Premium follows at one in five, with budget further back at roughly one in eight.

The labels do not map directly onto price. Three operators who call themselves premium or luxury charge AED 500 a month or less.

FOUR IN FIVE OPERATORS OFFER MONTHLY ROLLING MEMBERSHIP

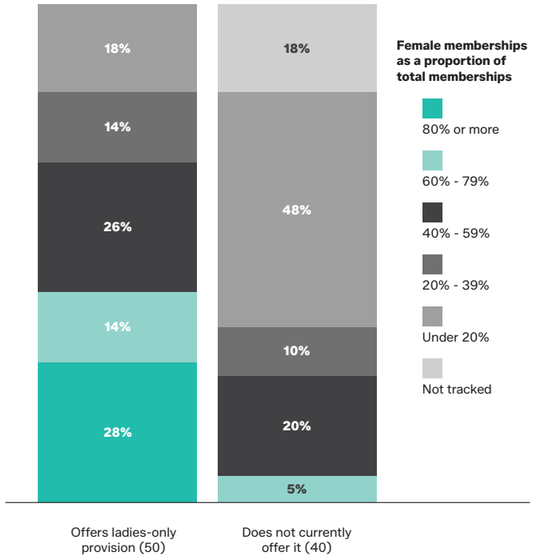


Responses: 103 operators. More than one structure could be selected.

Close to two in three also offer an annual or fixed term, and half-selling a day pass. Corporate membership reaches nearly one in four. On the consumer side, members whose employer pays in full are more than twice as likely to plan to leave as those who pay for themselves.

OPERATORS WITH LADIES-ONLY SPACES CAPTURE FAR MORE WOMEN

Operators already serving women can benefit from adding a ladies-only space. Responses confirm the space itself attracts women and consumers make the demand explicit. More than a third of women named ladies-only facilities among the things that would help them be more active, second only to price. This contrasts with more than a third of operators not offering dedicated sections at present.



Percentages within columns show the proportion of operators in each provision category that fall into each female membership bracket.

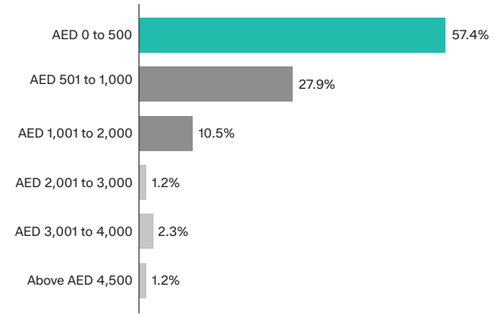
For example, 28% of operators offering ladies-only spaces have memberships that are 80% or more female.

Responses: 103 operators. Female share of membership within each group.

Nearly half of operators with ladies-only provision have memberships that are at least 60% female. Among those without ladies-only provision, just 5% have memberships that are 60–79% female, while almost half have memberships that are less than one-fifth female.

REVENUE PERFORMANCE AND PRICING MODELS

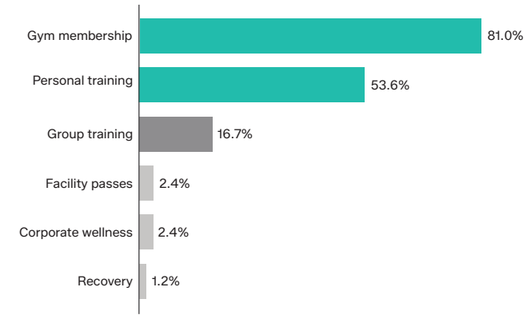
52% of Operators Charge AED 500 a month or less, 27% pay AED 400 or more a month and 9% pay AED 600 or more.



Responses: 98 operators.

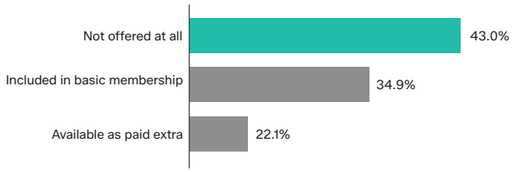
MEMBERSHIP AND PT ARE THE CORE OF THE BUSINESS

Four operators in five name gym membership among their two largest revenue lines. Personal training follows at just over half, and nothing else reaches one in five.



Responses: 94 operators. Up to two selections allowed.

FOUR IN TEN OPERATORS DO NOT OFFER RECOVERY SERVICES AT ALL

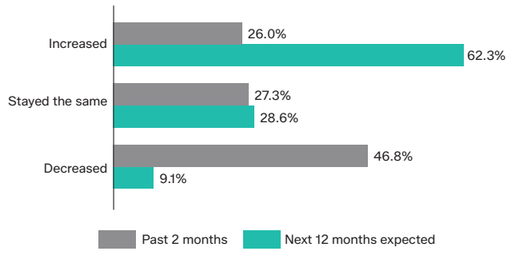


Responses: 98 operators.

Recovery is missing from 43% of businesses. A third include it in the basic membership and a fifth sell it as a paid extra.

Almost two thirds of operators charge non-members to use the sauna for recovery.

SIX IN TEN OPERATORS EXPECT GROWTH AFTER A YEAR WHEN HALF OF THEM FACED DECREASED REVENUES

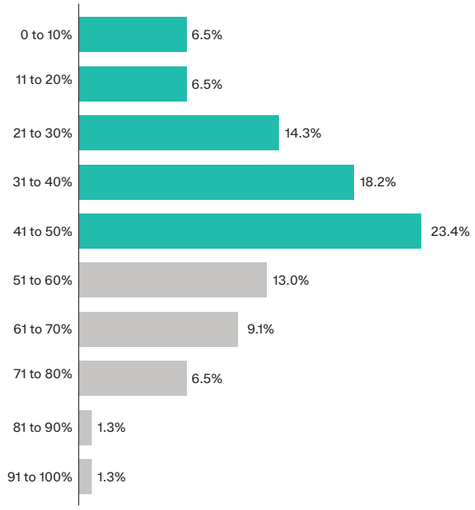


Responses: 85 operators trading for a year or more.

Revenue fell 49% of operators over the past twelve months. Looking ahead, 62% expect an increase and 8% a further fall. That optimism sits in a market where rising costs top the challenges operators placed first.

THE RETENTION CHALLENGE, ONE YEAR ON

SEVEN IN TEN OPERATORS RENEW 50% OR FEWER OF THEIR MEMBERS ANNUALLY

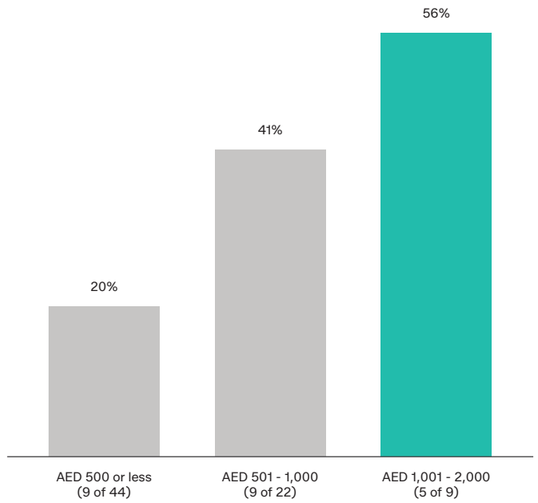


Responses: 85 operators trading for a year or more.

The largest group is between 41% and 50%, so around half the member base turns over each year and has to be replaced. Three operators report renewal above 80%. Members in the consumer survey confirm the same trend. Four in ten say they are likely to cancel or switch within the next six months.

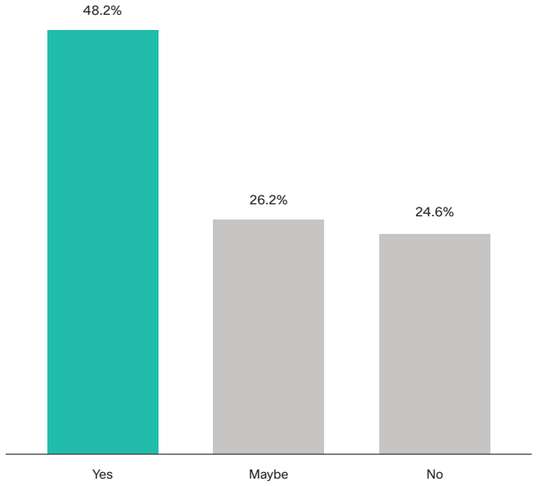
RENEWAL RISES WITH PRICE

Among operators charging AED 500 or less, 24% renew more than half their members. The share rises sharply to 41% in the next band, and six of the twelve operators charging between AED 1,001 and 2,000 manage it. Boutique studios make up more than a third of the operators charging above AED 500.



INVESTMENT AND EXPANSION APPETITE

HALF OF OPERATORS PLAN A NEW UAE SITE WITHIN TWO YEARS



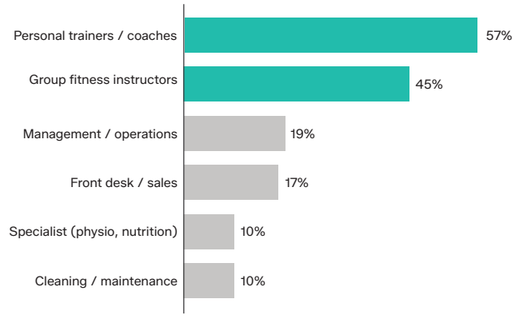
Responses: 70 operators.

Half plan to open in the UAE within twenty-four months, and a quarter are considering it. Thirteen of 70 have an active plan to expand abroad, nine of them in the GCC.

PERSONAL TRAINERS AND GROUP INSTRUCTORS ARE THE HARDEST ROLES TO RECRUIT AND RETAIN

Six operators in ten place staff recruitment and retention among their five biggest challenges, and personal trainers are the role they find hardest to fill.

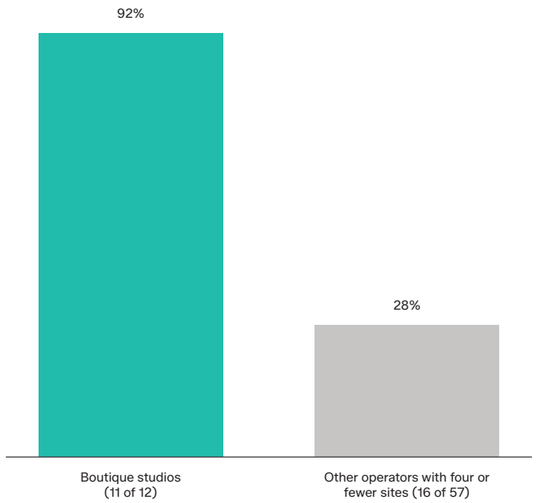
Roles Hardest to Recruit and Retain, % of Operators





THE BOUTIQUE AND STUDIO SEGMENT

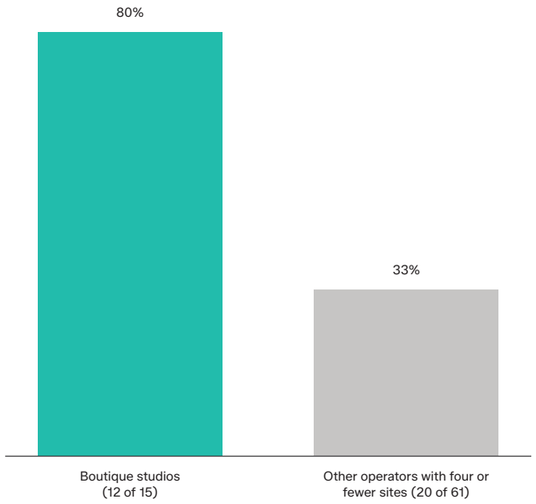
FOURTEEN OF FIFTEEN ESTABLISHED BOUTIQUES TURN OVER AED 1 MILLION OR MORE



Share reporting annual UAE revenue of AED 1 million or more. Operators running four sites or fewer and trading for a year or more.

Among boutique studios trading for a year or more, fourteen of fifteen turn over a million dirhams or more a year. Among other operators of a comparable size, the share is 28%. Member volumes are much alike, with most of each group serving fewer than a thousand people.

EIGHT IN TEN BOUTIQUES CHARGE ABOVE AED 500 A MONTH

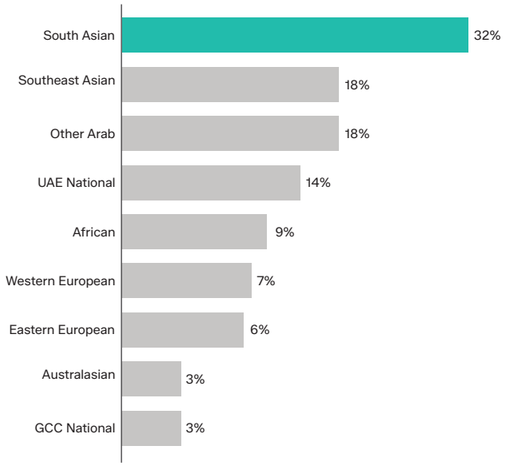


Charging above AED 500 a month for membership. Operators run four sites or fewer



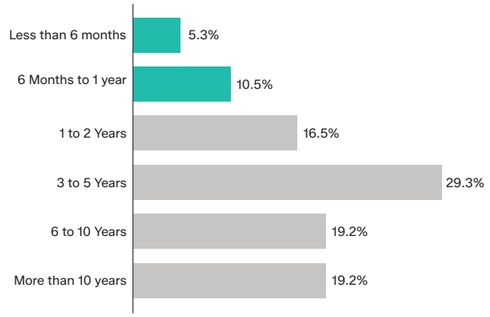
WORKFORCE AND TALENT: RECRUITMENT, RETENTION AND PAY

SOUTH ASIANS MAKE UP A THIRD OF THE AVERAGE OPERATOR'S WORKFORCE



Source: Operator-reported % of workforce

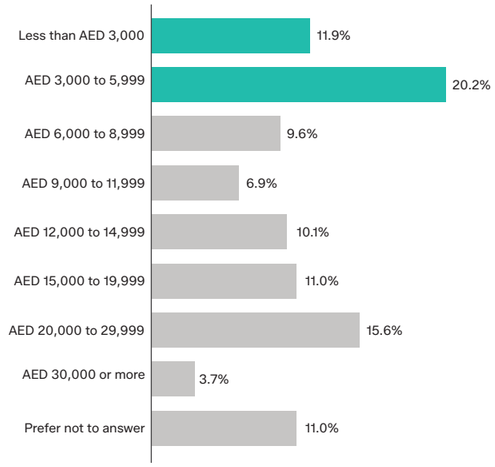
A THIRD HAVE WORKED IN THE UAE INDUSTRY TWO YEARS OR LESS



Source: Professionals survey.

Three in ten have been in UAE for between three and five years, with two thirds bringing more than five years in the industry worldwide.

THREE IN TEN EARN UNDER AED 6,000 A MONTH



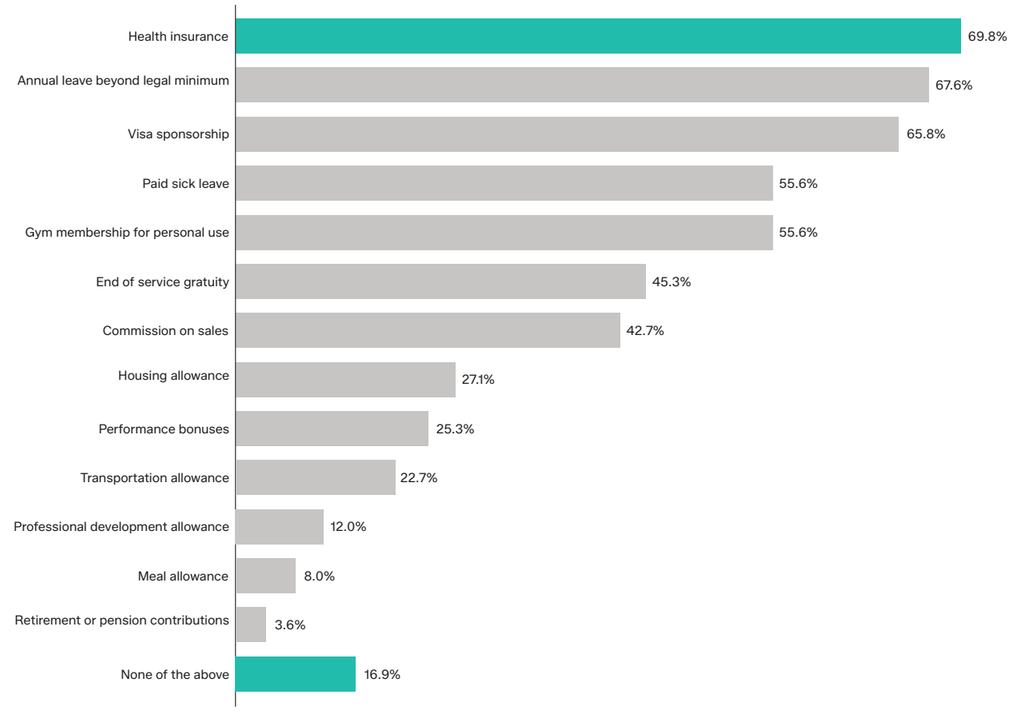
Source: Professionals survey.

Another three in ten earn AED 15,000 or more, and one in nine preferred not to say. Newcomers sit lower. Nearly half of those with two years or less in the UAE industry earn under AED 6,000, against three in ten of those here longer.

Commission features in seven in ten pay packages, though fewer than one in twenty-five are paid on commission alone.

SEVEN IN TEN RECEIVE HEALTH INSURANCE

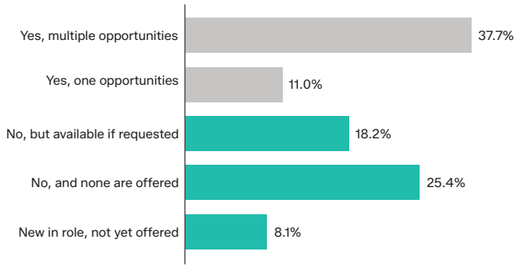
Health insurance, annual leave above the legal minimum and visa sponsorship each reach around two thirds. One professional in six receives none of the thirteen benefits listed. A development allowance reaches barely one in eight, and pension contributions fewer than one in twenty-five.



Source: Professionals survey.

WORKFORCE AND TALENT: RECRUITMENT, RETENTION AND PAY

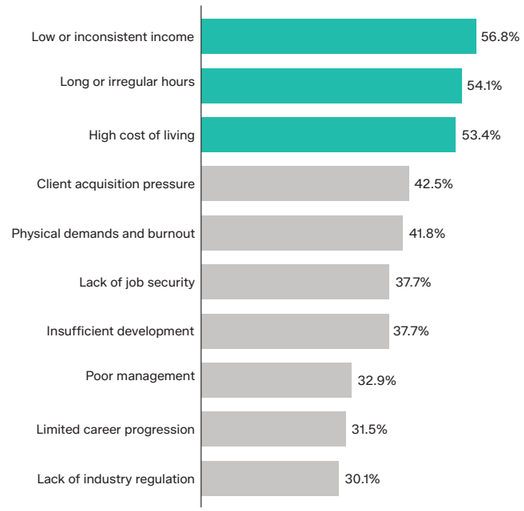
HALF RECEIVED NO EMPLOYER TRAINING LAST YEAR



Source: Professionals survey.

Just under half had employer-sponsored training in the past twelve months, and a quarter say none is offered at all.

PAY, HOURS AND COST OF LIVING LEAD WHAT PROFESSIONALS STRUGGLE WITH

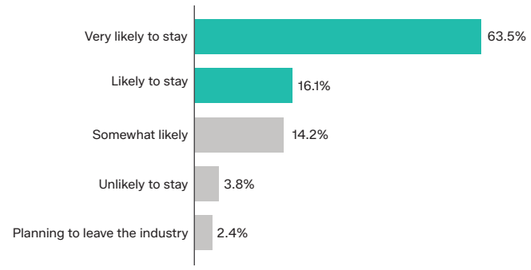


Responses: 146 professionals. Up to five selections allowed.

Low or inconsistent income tops the list, named by just over half, with long hours and the cost of living close behind. Nearly half work more than fifty hours a week and one in six works more than sixty.

Asked what would most raise their satisfaction, almost six in ten chose a higher base salary, twice would choose to received training. Operators place staff training joint fifth of their eight investment priorities.

EIGHT IN TEN EXPECT TO STILL BE IN THE INDUSTRY IN FIVE YEARS

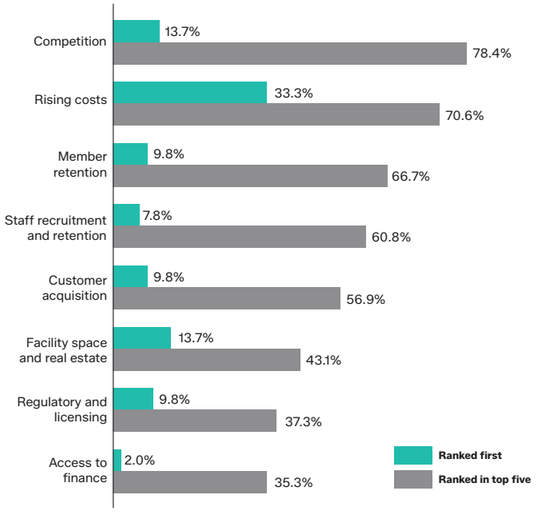


Responses: 211 professionals.

Seven in ten describe themselves as satisfied with their workplace. Three in ten say they are likely to leave their current employer within a year, yet eight in ten expect to still be working in fitness in five. People expect to move between businesses, not out of industry.

CHALLENGES AND OPPORTUNITIES

RISING COSTS ARE THE MOST URGENT CHALLENGE, COMPETITION THE MOST WIDESPREAD

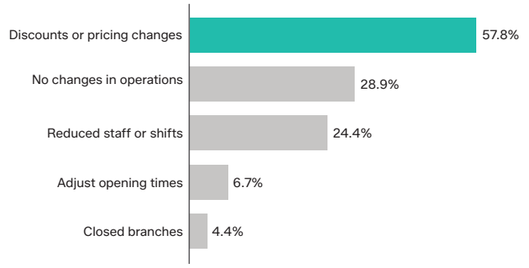


Responses: 51 operators, asked to rank their five biggest challenges in order.

A third of operators put rising costs first, more than twice the share choosing anything else. Competition is the most widespread concern, appearing in the top five for nearly eight in ten. Member retention and staff recruitment follow, each in the top five for at least six in ten.

Access to finance comes last on both measures. One operator puts it first and a third place it in their top five, while half intend to open a new site.

DISCOUNTING WAS THE MOST COMMON RESPONSE TO REGIONAL CONDITIONS



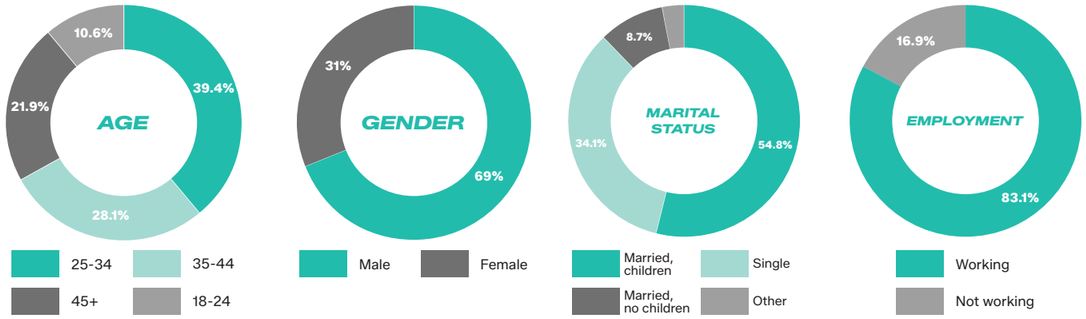
Responses: 45 operators who reported an impact. More than one response allowed.

Three operators in four say regional conflict or tension has affected their business. Among them, 58% responded with discounts or pricing changes. A quarter cut staff or shifts, and three in ten changed nothing.

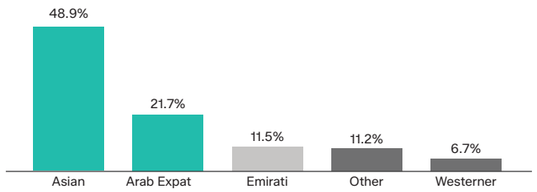


CONSUMER SURVEY SNAPSHOT

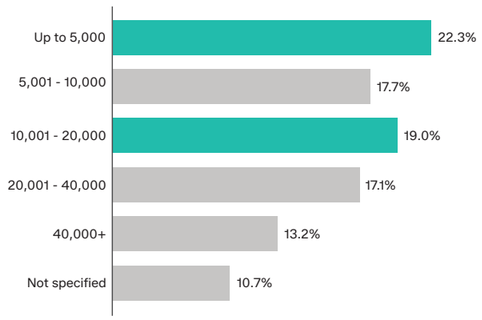
RESPONDENTS ARE MOSTLY WORKING-AGE, MALE AND EXPATRIATE



NATIONALITY



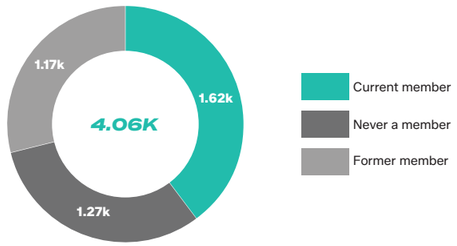
MONTHLY HOUSEHOLD INCOME (AED)



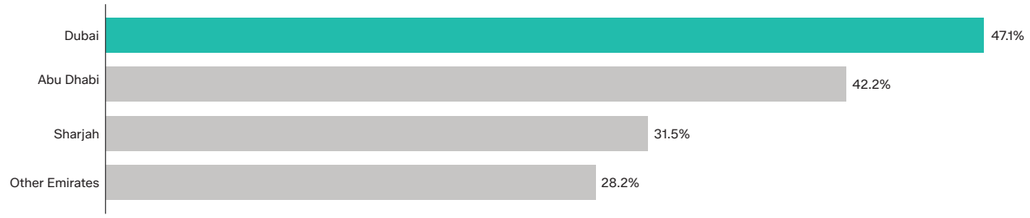
Two thirds of adults are aged 25 to 44, the years when work and time pressure are main challenges, therefore lack of time is the reason non-members give most often for not joining. The market is also predominantly male and overwhelmingly expatriate, and income spreads across six bands with none above 22.3%.

MEMBERSHIP PROFILE: 60% OF RESPONDENTS ARE NOT MEMBERS OF COMMERCIAL FITNESS

The biggest market opportunity sits outside the current membership base. Just under three in ten adults have held a membership and let it go, and a slightly larger share have never joined at all. Of those non-members, 71.9% would join or return, a potential customer pool already larger than the current member base.

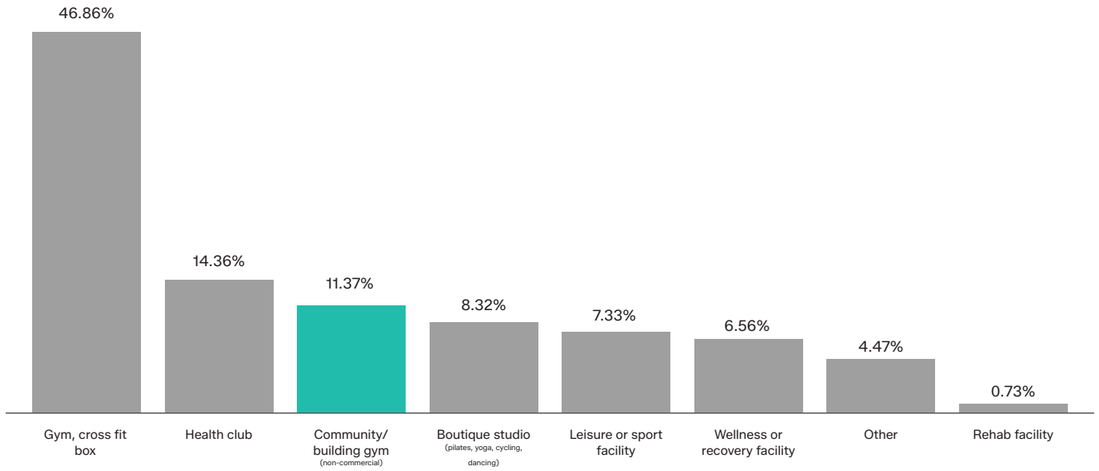


MEMBERSHIP IS HIGHEST IN DUBAI AND ABU DHABI



Membership also varies by emirate. It runs at 47.1% in Dubai and 42.2% in Abu Dhabi, and falls to 31.5% in Sharjah and 28.2% in the other emirates; the difference between those two is too small to call.

RESIDENTIAL GYMS ALREADY HOLD 11% OF THE MARKET



Gyms and CrossFit boxes dominate the market, with health clubs a distant second at under a third of their share. Community and building gyms come third. Residents pay for them through service charges rather than a membership fee, and developers continue to add them to new communities.

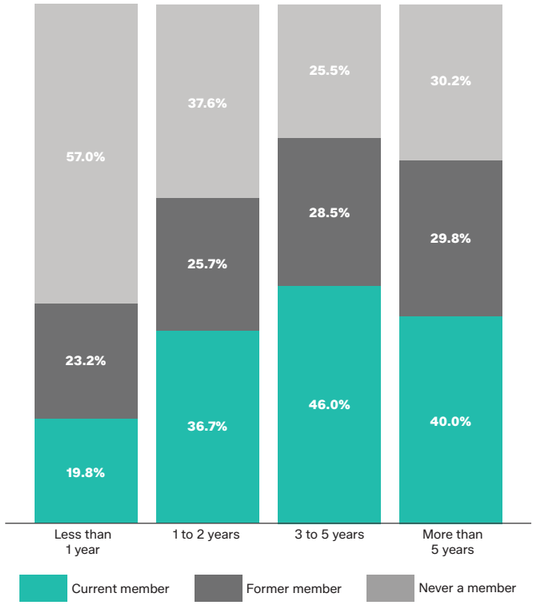
SOCIO-DEMOGRAPHIC PROFILE

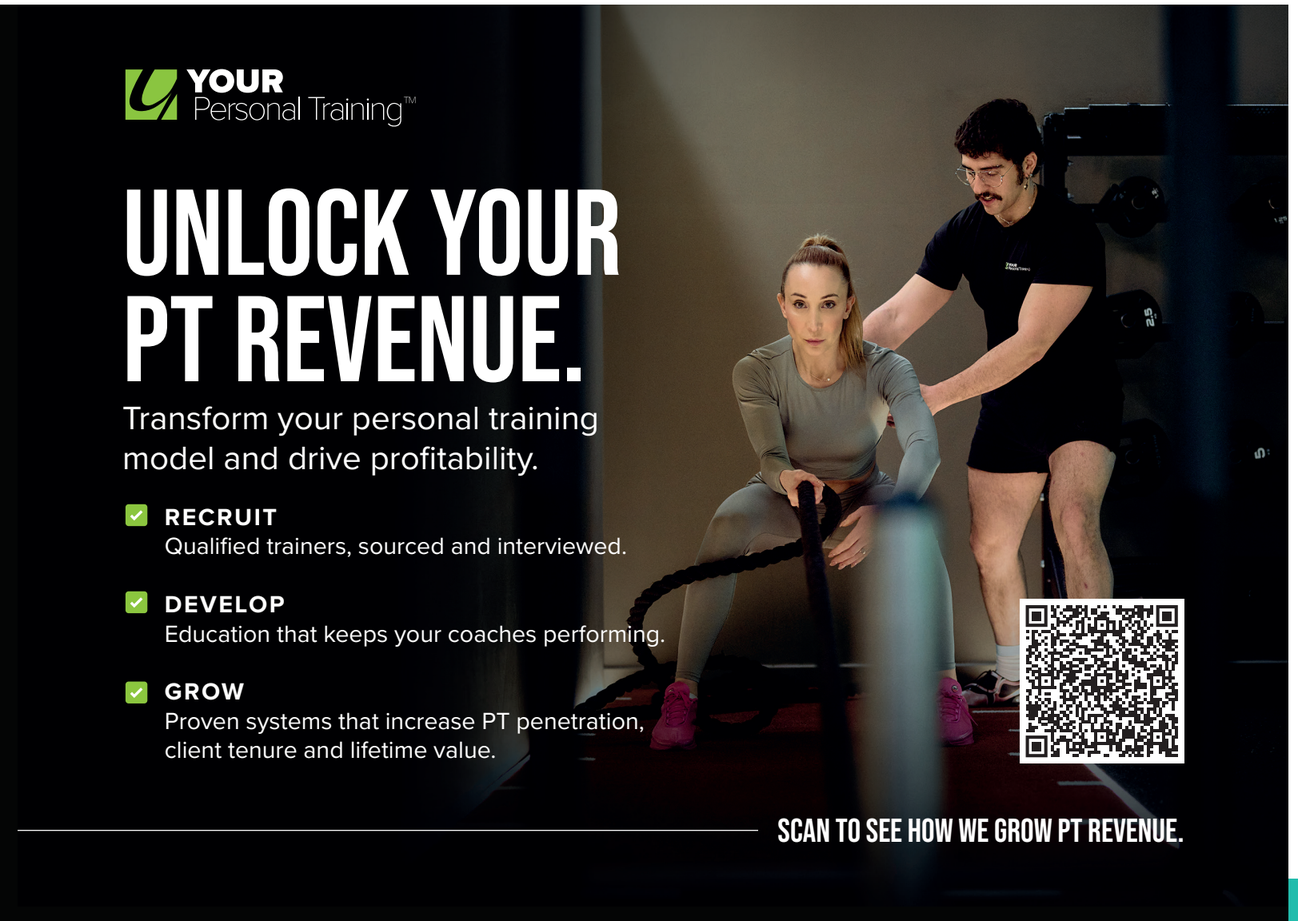
MEMBERSHIP MORE THAN DOUBLES AFTER TWO YEARS RESIDING IN THE UAE

New arrivals are the least likely residents to hold a membership. More than half of those in their first year have never held one, at 57.0%, against a quarter of residents here three to five years. Membership rises from 19.8% in the first year to 36.7% after one to two years and 46.0% after three to five, as newcomers settle into routines and build local networks.

Operators can reach new arrivals earlier through the partners who meet them first: relocation agents, developers, employers, and residency-visa services.

Planned length of stay does not explain the gap. 70.7% of residents expect to stay more than five years, and 37.8% plan to stay permanently. That permanent intent barely moves with membership status: 36.1% of current members, 38.6% of former members and 39.2% of those who never joined.

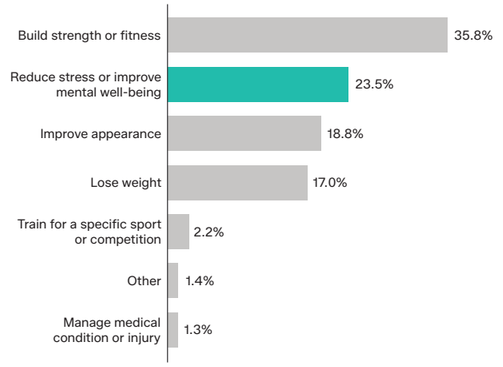




USAGE FREQUENCY AND FITNESS GOALS

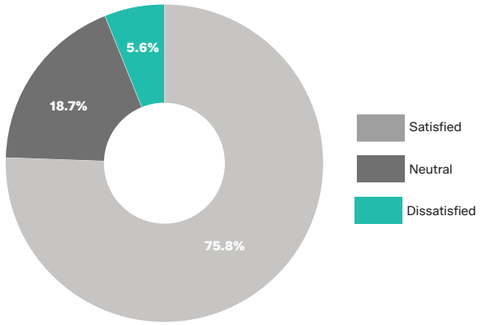
MENTAL WELLBEING OUTRANKS APPEARANCE AS A REASON TO TRAIN

Strength and fitness remain the leading reason to train (35.8%), with stress and mental wellbeing second (23.5%), ahead of appearance (18.8%) and weight loss (17.0%). Marketing that focuses on appearance or weight loss only addresses the third and fourth motivations.



ONLY 5.6% OF MEMBERS ARE UNHAPPY WITH THEIR PROGRESS

Current and former members asked how satisfied they are with progress towards their main fitness goal. Three quarters (75.8%) of current and former members are satisfied with their progress.



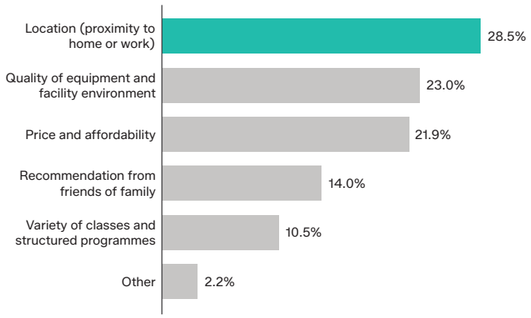
MEMBERS VISITING TWICE A WEEK OR LESS ARE MOST LIKELY TO LEAVE

Attendance is linked to intention to leave. Those visiting twice a week or less plan to leave at 53.1%, against 35.5% of members attending three to four times. Visiting five or more times adds no further protection.



LOCATION DECIDES MORE SALES THAN EQUIPMENT OFFERING OR PRICE

Location is the most common reason members choose their facility (28.5%), ahead of equipment offering, environment (23.0%) and price (21.9%), which makes site selection one of the most consequential decisions in the business.

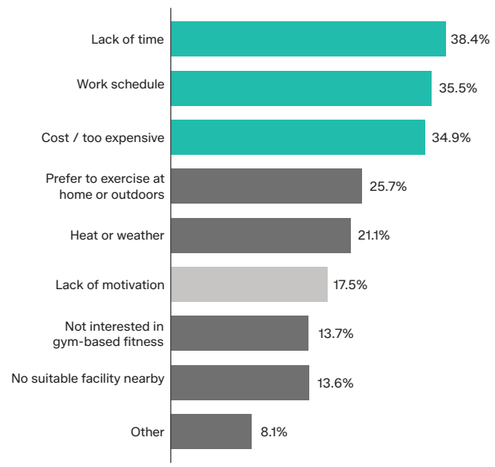




BARRIERS AND ENABLERS TO PHYSICAL ACTIVITY

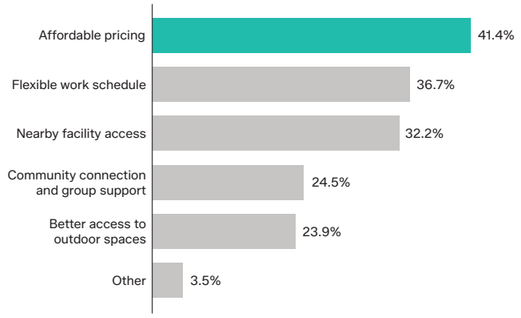
TIME AND COST ARE TWICE AS COMMON AS REASONS NOT TO JOIN AS MOTIVATION

Practical obstacles keep most non-members out. Lack of time leads at 38.4%, followed closely by work schedule and cost. Only 17.5% cite lack of motivation. Cheaper entry tiers and more flexible opening hours address these barriers more directly than campaigns aimed at motivation.



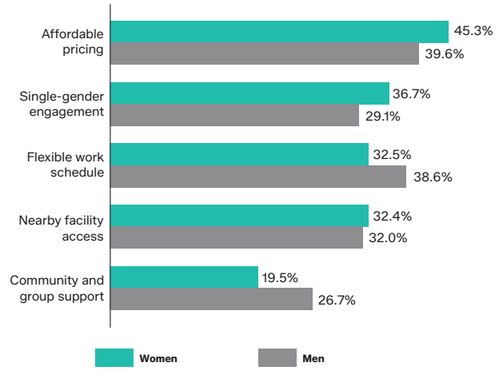
AFFORDABLE PRICING LEADS WHAT RESIDENTS SAY WOULD HELP

Asked what would help them be more active, residents put affordable pricing first, followed by flexible working hours and a nearby facility. The first two match the main reasons non-members give for staying out.



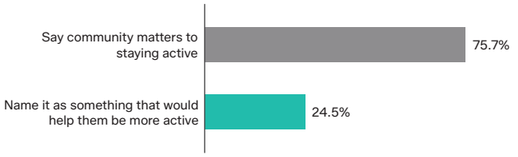
AMONG WOMEN, LADIES-ONLY SPACES RANK SECOND ONLY TO PRICE

More than a third of women (36.7%) chose ladies-only spaces, putting them second only to price and ahead of flexible hours, a nearby facility and community. Men see it differently. They put flexible working hours almost level with price, at 38.6% against 39.6%, and three in ten (29.1%) chose gents-only spaces.



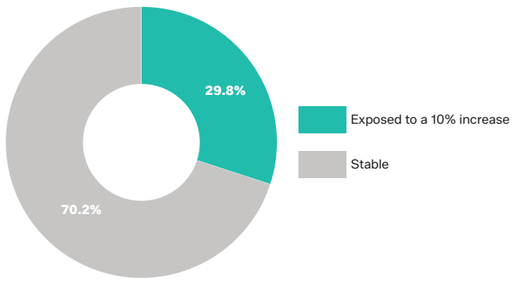
RESIDENTS VALUE COMMUNITY TO STAY BUT RARELY NAME IT AS A REASON TO START

Three in four residents say community is important to staying active. Yet given a list of things that would help them be more active, only one in four picked it, well behind price, flexible hours, and a nearby facility. Community appears to work better as part of the offer than as the main reason to join.



SPEND, VALUE PERCEPTION AND CHURN RISK

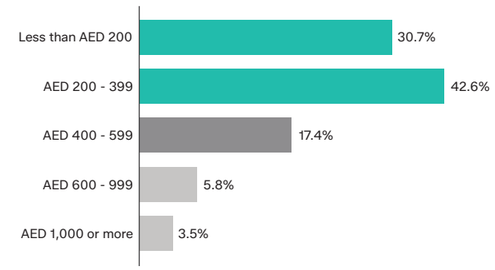
A 10% PRICE RISE EXPOSES 30% OF MEMBERSHIP REVENUE



Assumes six in ten of those who say they would switch actually do.

Half of current and former members, 49.9%, say a 10% increase would likely push them to cancel or switch. Resistance holds between 47.7% and 57.6% in every price band, so premium members tolerate increases no better than budget members.

73% OF MEMBERS PAY UNDER AED 400 A MONTH



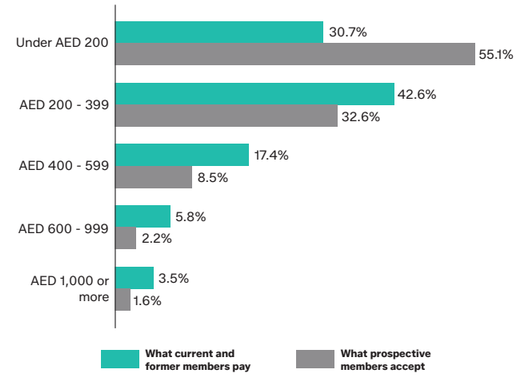
Most of the market pays between AED 200 and AED 399, and only 9.3% pay above AED 600. Premium price points serve a small slice of the market.





MOST PROSPECTIVE MEMBERS EXPECT TO PAY UNDER AED 200

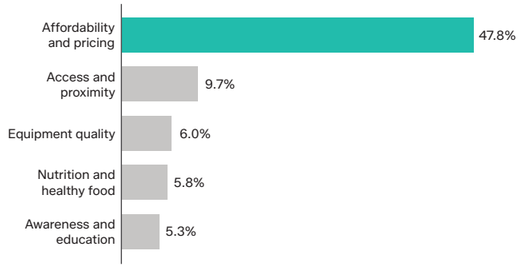
Prospective members expect to pay under AED 200, 87.7% under AED 400, and four in five rate price extremely or especially important. An entry tier below AED 200 would reach more than half of them. The gap suggests room for a cheaper entry tier.



The two groups overlap. Grey shows what current and former members pay or last paid. Teal shows what non-members open to joining think is reasonable, and many of them are former members.

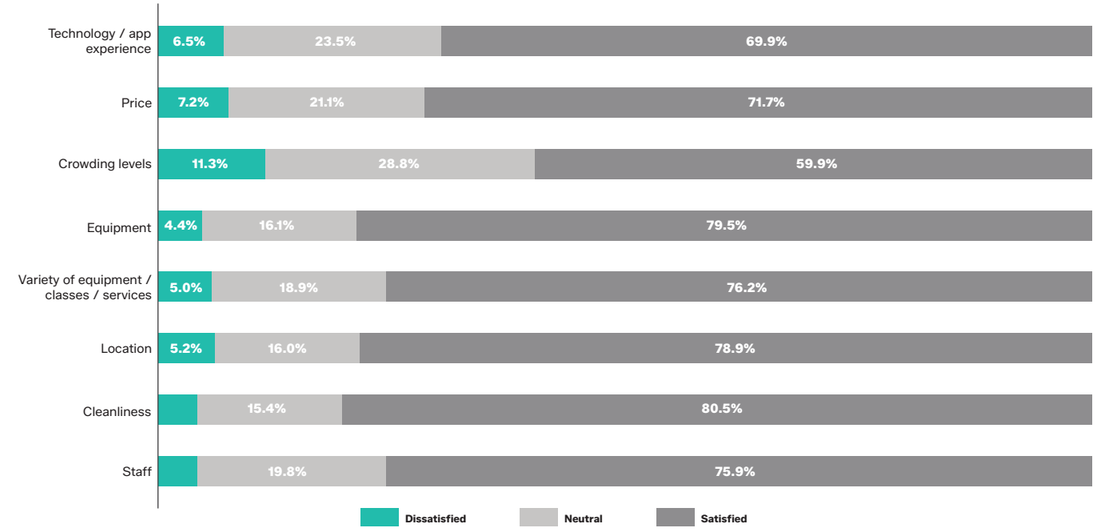
PRICE LEADS UNPROMPTED SUGGESTIONS FIVE TO ONE

Residents were asked to name one thing they would improve about the UAE health and fitness industry, in their own words and in English or Arabic. Just over half named something specific, and nearly half of those named price, about five times as many as named the next most common theme. The question did not mention price, so these responses were unprompted.



SERVICE GAPS: PERSONAL TRAINING, RECOVERY, AND CLASSES

CROWDING IS THE CLEAREST WEAK POINT IN THE MEMBER EXPERIENCE

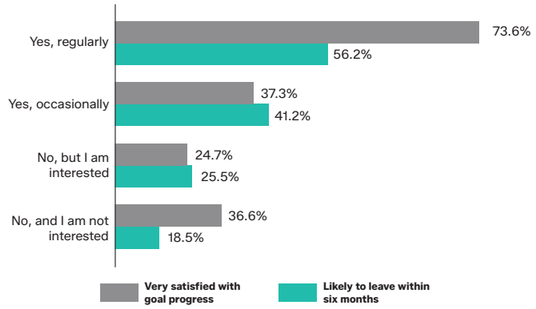


Satisfaction with every other attribute range from 69.9% (technology and app experience) to 80.5% (cleanliness). Crowding scores 59.9%, ten points below the next weakest, and draws the most dissatisfaction, at 11.3% against 7.2% for price, the next highest. Dissatisfaction with crowding ranges from 10% to 15% across facility types and from 10% to 12% across emirates.

Crowding is named more often as a reason to leave than as a reason for having left: 23.1% of current members say it would make them leave, but only 9.7% of former members say it is why they did.

Members managing a health condition plan to leave at 56.8%, against 32.3% of members with neither a condition nor a disability. The gap holds after accounting for employer funding, age, and attendance. Condition-specific programming and recovery services are worth testing as a retention response.

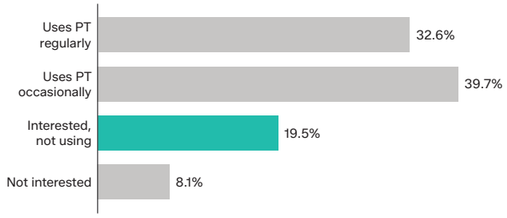
PT CLIENTS ARE SATISFIED WITH PROGRESS BUT DOES NOT RESULT IN HIGHER LOYALTY



Clients who use PT regularly are also those who respond that are likely to leave within six months.

19.5% OF MEMBERS WANT PERSONAL TRAINING BUT DO NOT USE IT

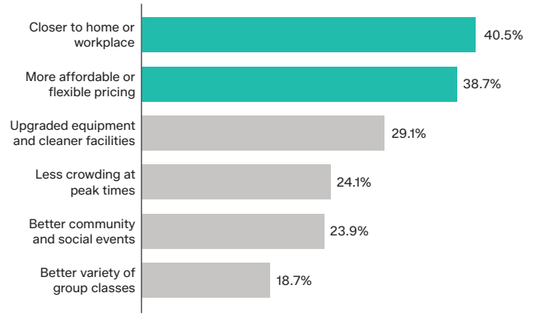
About one in five members are interested in coaching but have not started. They already hold a membership, which makes them the most direct personal training opportunity an operator has.



Source: consumer report

PROXIMITY AND PRICE WOULD BRING MEMBERS IN MORE OFTEN

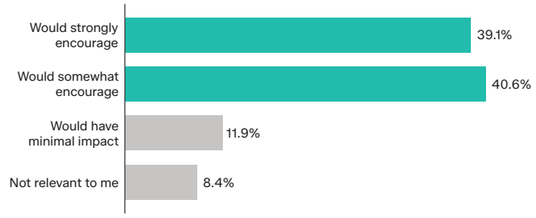
Asked what would make them visit more often, four in ten current and former members named a closer location, and almost as many named a lower or more flexible price. Better class variety came last, chosen by fewer than one in five. Community landed at about one in four, most where residents placed it when asked what would help them be more active.



Respondents: Current and former members, asked about their own facility. More than one answer allowed.

WEARABLES, AI, AND DIGITAL FITNESS

WEARABLE INTEGRATION WOULD ENCOURAGE FOUR IN FIVE TO JOIN OR STAY

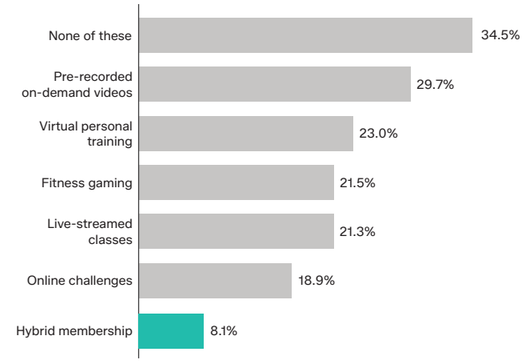


Respondents: Members, former members, and non-members open to joining.

Four in ten residents use a fitness wearable, and one in five uses no digital tool at all. Asked whether a facility connecting to their wearable would affect the decision to join or stay, four in five said it would encourage them, and two in five said strongly.

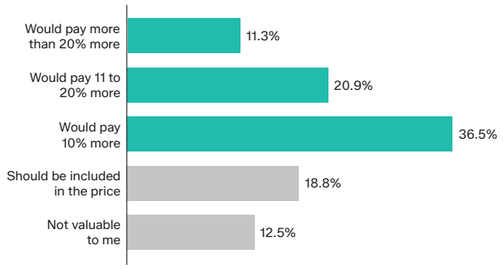
TWO THIRDS USE VIRTUAL FITNESS, ONE IN TWELVE THROUGH A HYBRID MEMBERSHIP

Two thirds of residents tried at least one virtual format in the past year, led by on-demand workout videos at three in ten. Hybrid membership, combining facility access with virtual sessions, reaches one in twelve. Among operators, digital and online offerings rank last of eight investment priorities, and fewer than one in ten sells online or virtual training.



Respondents: 4,062 UAE residents. Participation in the past twelve months.

TWO THIRDS WOULD PAY EXTRA FOR DIGITAL, MOST OF THEM UP TO 10%



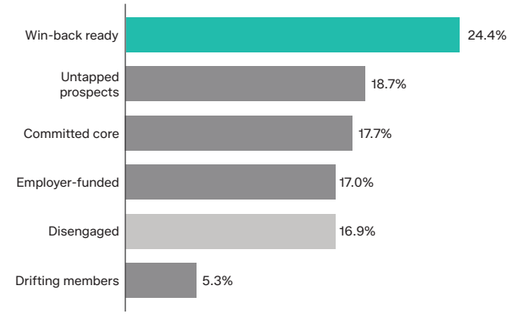
Respondents: Members, former members, and non-members open to joining.

Just over a third stop at a 10% uplift, and only one in nine would go beyond 20. More than four in ten of those willing to pay over 10% extra use three or more digital tools, against fewer than one in ten of those who see no value in digital features.

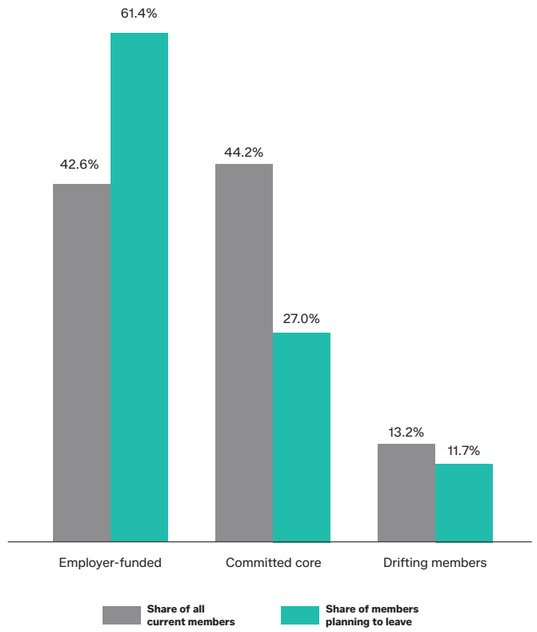
MEMBER SEGMENTS: FIVE CONSUMER PROFILES

Combining consumer and operator insights, we define five consumer segments that behave differently enough to warrant separate strategies.

FORMER MEMBERS WILLING TO RETURN ARE THE LARGEST SEGMENT



PROPOSED CUSTOMER SEGMENTS



The two largest segments both sit outside the current membership base:

1. **Win-Back Ready,** at 24.4% of adults, covers former members who would return, roughly five in six of everyone who has held a membership and let it go. Lack of time and work schedule hold them back more than cost or summer heat.
2. **Untapped Prospects,** at 18.7%, have never joined but would consider it. Cost leads their barriers at 44.9%, two thirds expect to pay under AED 200, and 36.7% earn AED 5,000 or less a month, which puts an entry tier first for this group. Together these two account for 43.1% of UAE adults.
3. Inside the member base, **Committed Core** is the most stable group at 44.2% of current members, with a quarter planning to leave. They pay all or part of their own fee and visit often, so keeping the peak-time experience positive retains them.
4. **Employer-Funded** is making up 42.6% of current members and 61.4% of those planning to leave. These members are more than twice as likely to plan to leave as members who pay for themselves, and no other factor measured has a stronger link. Asking employees to pay part of the cost in corporate deals is a practical first step to improving retention.
5. **Drifting Members,** 13.2% of current members, they show low attendance levels and at amount to 11.7% of members risk of leaving.

LOOKING AHEAD: SENTIMENT AND THE 2027 RESEARCH AGENDA

OPERATORS: ONE WORD FOR 2026

Asked for one word to describe the industry in 2026, 44.3% of operators chose Competitive, 36.1% Growing and 19.7% Maturing. In 2025 the answer was free text and the most frequently used words were Booming (11%), Evolving (7%) and Competitive (7%), so the two years are not directly comparable. Most operators still expect growth (65.5%), even though two thirds of those affected by regional tensions are cautious about the next six months.

PROFESSIONALS: CAREER INTENTIONS AND STANDARDS

80.2% of fitness professionals say they are likely or highly likely to still be working in fitness in five years, and only 1.9% plan to leave the industry. 79.1% strongly support mandatory, industry-wide professional standards. Number of professionals feeling respected is lower among women at 43.3% compared to 54.5% of men.

CONSUMERS: IN THEIR OWN WORDS

When asked to name one thing they would improve about UAE health and fitness, just over half of residents named something specific. Among them, affordability is the most frequently mentioned theme, raised by close to half, about five times as often as the next theme, access and proximity. Figures are a share of residents who made a suggestion, not of all residents.

“More affordable pricing options and reduced overcrowding during peak hours to make facilities more accessible.”

“Improve the programme schedule to accommodate different people with different work schedules.”

THE 2027 RESEARCH AGENDA

The 2027 edition should repeat the consumer survey on the same design, so that 2026 and 2027 form the first true year-on-year comparison. It should also ask operators to share anonymised attendance and renewal data, which would test the attendance and employer-funding findings with observed behaviour. Three further areas are proposed: corporate wellness contracts and employee co-payment, demand from new arrivals, and capacity at peak times.

The 2027 edition also depends on better access to operators. This year the invitation list had to be compiled from separate emirate registers, with incomplete contact details and no listing for Ras Al Khaimah. A shared national facility listing, maintained with the licensing authorities, and a commitment from working group members to encourage participation across their networks would allow the operator survey to move from roughly one in five licenced facilities towards a majority. Coverage by emirate also needs to improve. Only 13 operators trading in Sharjah and 3 professionals working mainly in Sharjah responded, so this edition cannot describe the supply side or workforce of an emirate that holds more than a fifth of UAE adults.

APPENDICES, CONTRIBUTORS, ACKNOWLEDGEMENTS AND CONTACTS

CONTRIBUTORS

Report lead: IEG Middle East (GFX Global Fitness Expo, Formerly Dubai Active Industry, Dubai Active and Dubai Muscle Show).

Report partners: UAE Sports Science and Sports Medicine Center under Ministry of Sports, Emirates Bodybuilding and Fitness Federation (EBBF), Qantara Sports. Research, analysis and validation: Qantara Sports.

Consumer fieldwork: YouGov. Supporting partners: REPs UAE, Dubai Fitness & Wellness Business Group, Boxology and Women in Sport Middle East.

QUESTION WORDING FOR KEY MEASURES

Membership status: “Are you currently a member of a gym, studio, or fitness facility in the UAE?” Intention to leave: “How likely are you to cancel or switch away from your current fitness facility in the next 6 months?”

Price sensitivity: “If your current fitness facility increased its membership price by 10%, how likely would you be to cancel or switch to a cheaper alternative?” ‘Likely to leave’ throughout the report means ‘likely’ (70–89% certain) or ‘very likely’ (90–100% certain).

HOW THE CONSUMER SEGMENTS WERE DEFINED

The five customer segments follow a transparent set of rules rather than a statistical model, so operators can recognise them and the 2027 edition can use the same definitions. Rules applied in order: membership status (current, former, never); willingness to join (non-members); who pays the fee (employer in full against self or shared); and attendance (current members).

CODING FRAME FOR OPEN RESPONSES

Open answers in English and Arabic were coded into themes (pricing and affordability; access and proximity; facility quality and cleanliness; working hours and flexibility; outdoor and public spaces; other). Answers without a specific suggestion were excluded from the base.

CONTACT

Info@globalfitnessexpo.com

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gavin.baxter@iegme.com

SUPPORTING PARTNERS



LOOKING AHEAD: THE 2027 REPORT

The UAE Health and Fitness Industry Report is confirmed to return in 2027, building on the foundations established by the 2026 edition.

Continuing the partnership between the UAE Sports Science and Sports Medicine Training Center, the Emirates Bodybuilding and Fitness Federation (EBBF), IEG Middle East and Qantara Sports, the next edition will expand on existing research to deliver deeper market intelligence, evolving consumer insights and a clearer understanding of the trends shaping the UAE's health and fitness sector.

The 2027 report aims to track industry progress, identify emerging opportunities and support informed investment, strategic decision-making and sustainable long-term growth.



IEG MIDDLE EAST