Appetite for Disruption:

What GLP-1 means for consumer markets

A snapshot on Fitness: confidence in motion

July 2026

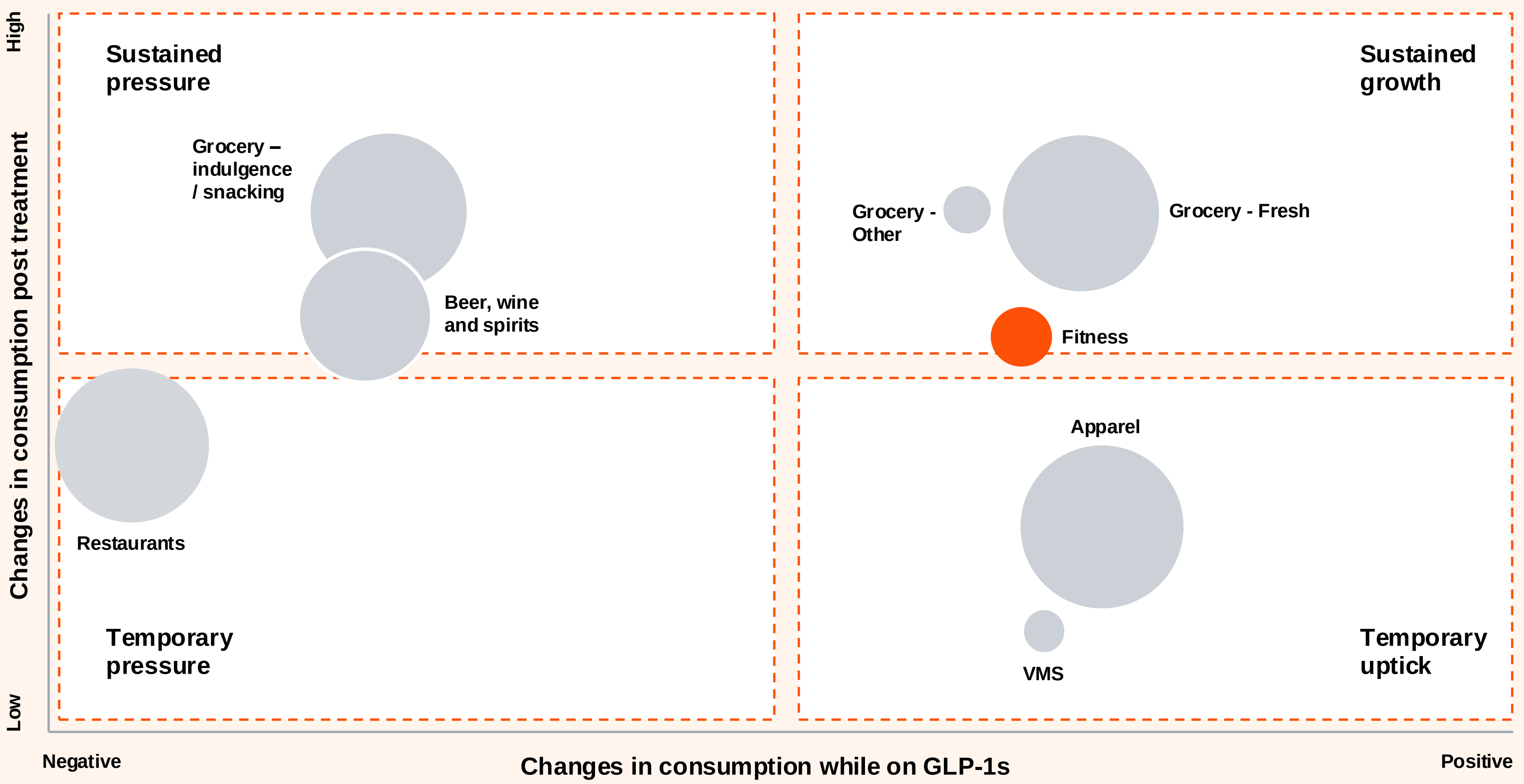
Impact of GLP-1 on Fitness: confidence in motion

As GLP-1 changes the body, fitness can help make changes stick

GLP-1 medication is already changing how millions of people in the UK eat, drink, exercise and shop. We surveyed more than 2,300 UK adults to explore who is using GLP-1 and how it is changing their behaviour. The findings are important for any brand, retailer or service provider trying to win spend from GLP-1 users.

For **Fitness**, GLP-1 is reshaping demand from weight loss and calorie burn towards building confidence, strength and fitness. Users are not just exercising more, they are building fitness into a broader wellness stack that supports weight loss, protects muscle, improves energy and helps sustain progress after treatment. For fitness providers, the winners will move beyond offering gym access to tailoring propositions for GLP-1 users' fitness levels, life stage and support needs – encouraging fitness routines to stick and users to maintain healthier lifestyles.

Stickiness of GLP-1 spending behaviour: consumption changes during GLP-1 usage and after GLP-1 usage



Key: Current Market Size (£1bn)
Focus of this paper

Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact

The GLP-1 Fitness basket: new bodies, new routines

Body confidence

GLP-1 is increasing the confidence and motivation that bring consumers into fitness. Among those increasing exercise activity, 57% say they were more confident about their body, 47% say they had more energy to exercise, and 39% say they were advised to exercise alongside GLP-1 treatment. During GLP-1 use, 27% of users increased fitness spend, versus 5% decreasing, giving a +22ppt net spend intent across current and past users. For fitness providers, the opportunity is to help people who are on a weight-loss journey to build strength, confidence and routines.

Spend reallocation

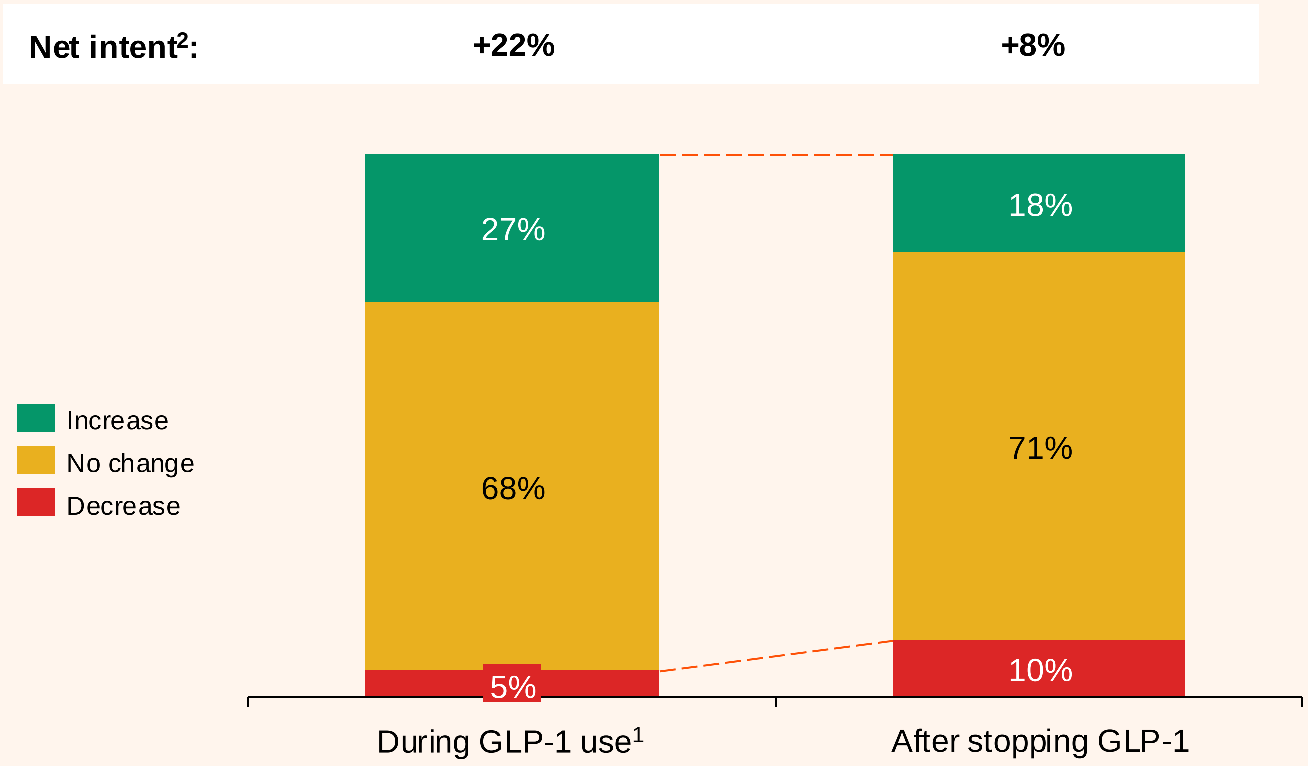
GLP-1 is creating a higher spend opportunity in fitness. Among current and former GLP-1 users, 74% reported spending £10-£50 per month on fitness before treatment, providing potential for higher spending. Among those who indicated an increase in spend during GLP-1 use, 41% joined a gym or started fitness classes, 39% started new types of exercise or classes, 20% upgraded to a more premium club, 20% switched to more strength-based exercise, and 16% started using a personal trainer. As growth is moving towards structured and guided formats, fitness providers should prioritise onboarding, classes, premium support and coaching environments where customers are more willing and able to change behaviour.

Routine stickiness

Fitness engagement moderates after treatment, but the direction remains positive. Among previous GLP-1 users, 18% report higher fitness spend after stopping treatment versus before GLP-1, compared with 10% who report lower spend, resulting in a +8ppt net spend intent. For fitness providers, the opportunity is to design for retention and not just activation. The winners will help users move from the early motivation of weight loss into maintenance journeys that keep them engaged.

Fitness spend increases during GLP-1 use; and Fitness demand appears sticky beyond treatment

Changes in Fitness spend intentions, compared to before GLP-1 usage
% of respondents



Notes: 1) Current GLP-1 users and previous GLP-1 users who have not taken GLP-1s in the past 12 months; 2) Delta between proportion of respondents indicating positive and negative change in spend intention | Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact

The GLP-1 Fitness basket: the motivation and format divide

A matrix of motivations

Body confidence is a shared trigger for men and women, at 58% and 56% respectively, and is strong among younger users, cited by 73% of 18-24s and 65% of 25-34s increasing activity. However, women express higher energy and support needs: 59% say they had more energy to exercise versus 35% of men, while 44% were advised to exercise alongside treatment versus 35% of men. Older users are also looking for more advice, with 63% of 55-64s saying they were advised to exercise alongside GLP-1 treatment that reflects higher health concerns than younger generations.

The implication: Age and gender will guide how fitness providers activate GLP-1 users during and post treatment

Access, discovery and support

The move into fitness takes different routes depending on starting point and goals. Men are more likely to convert through gym access and structured settings, with 48% having joined a gym or started fitness classes versus 33% of women while on GLP-1. Women over-index on discovery and variety, with 49% starting new types of exercise or classes versus 30% of men. Baseline BMI adds another layer: users with BMI above 25 are significantly more likely to join a gym or start classes than those below 25, at 44% versus 33%, suggesting that overweight users will seek structured environments.

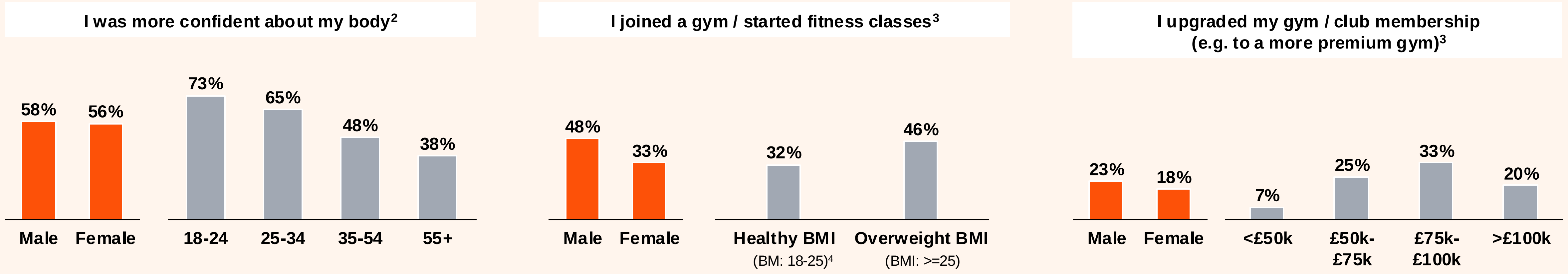
The implication: Fitness format is a key conversion lever where initial experience, levels of guidance and progression models drive routines

Targeted premiumisation opportunities

GLP-1 users are not all trading up in the same way with variations in behaviour by income, age and gender. Income is the strongest signal: among users increasing fitness spend, 33% of £75k-£100k earners upgraded to a premium club, while 27% started using a personal trainer. Age and gender add further nuance. 25-34s are more willing to trade-up, with 29% upgrading to a premium gym and 23% starting personal training. Men are also more likely than women to convert into both premium gyms and PT, at 23% versus 18% for premium upgrades and 23% versus 10% for personal training.

The implication: Fitness providers should target premium offers where willingness to pay, life stage and appetite for guidance overlap

Behaviour change by demographics
% of respondents[1]



Notes: 1) The % represent what proportion of each age/gender/income/BMI group reported each behaviour. 2) And after starting GLP-1, what drove the increase in your exercise activity? Please select all that apply. 3) After starting GLP-1, what drove the increase in your spending on exercise? Please select all that apply. 4) GLP-1s are indicated for people with BMI over 25 but people with BMI less than 25 are able to take them to maintain weight loss already achieved after starting on GLP-1. | Source: Strategy& UK Consumer Survey June 2026: GLP-1 Adoption and Cross-Sector Spending Impact

Winning the GLP-1 fitness routine: sustaining momentum

Reshape the proposition

Fitness propositions have often been built around weight loss, calorie burn and generic gym access. But for GLP-1 users who are losing weight and gaining confidence, the role of fitness shifts towards supervised, evidence-led support for strength, mobility and maintenance at a critical junction in a customer's life

- Reframe fitness from weight loss to building strength, fitness and maintenance
- Tailor formats from low intimidation starter classes to supervised strength training and mobility support
- Build onboarding that captures baseline fitness, confidence, BMI and treatment stage
- Use body composition, strength gains and habit milestones to evidence progress beyond weight loss

Capitalise on the adoption moment

GLP-1 creates a window where users are more open to entering or re-entering fitness, but motivation does not automatically become routine. To capture this adoption moment, fitness providers need to understand GLP-1 specific needs and design journeys that convert first action into repeat behaviour

- Provide starter offers such as class trials, fitness consultations and body composition checks
- Use onboarding and CRM to provide users with tailored prompts, training and class recommendations, check-ins and milestone tracking
- Upskill frontline teams and coaches on GLP-1 user needs, including side effects and muscle preservation
- Create community touchpoints that help gym members connect and motivate each other to maintain the routine

Collaborate beyond the gym

GLP-1 users are entering fitness through a mix of clinical advice, concern about muscle loss and renewed confidence, while some are held back by fatigue, side effects or medication cost. Fitness providers can play a stronger role by linking with nutrition, supplements and pharmacy to turn fragmented advice into holistic programmes

- Partner with pharmacies, telehealth providers and weight-management clinics to translate "you should exercise" into supervised strength and mobility programmes
- Connect fitness with nutrition and VMS partners around protein, hydration, energy and recovery, especially for users managing lower appetite or negative side effects
- Build tailored plans by treatment stage and user need, from starter movement and muscle preservation to plateau support and post-treatment maintenance

> "GLP-1 is reshaping fitness participation: users are gaining confidence and energy but risk losing muscle and certainty about how to exercise effectively. Fitness providers can elevate their role for GLP-1 users – converting short-term motivation into lasting wellness routines.

Eleanor Scott

Strategy& Partner, Consumer Markets

Please get in touch to hear more

About the consumer survey methodology

In June 2026, Strategy& conducted a comprehensive survey of 2,315 UK consumers aged 18–65+ to understand who is using GLP-1 (current and past), why they are using it, how they are accessing it, and how they are changing their spending habits across grocery, alcohol, VMS, apparel, restaurant and fitness categories. The survey was run before the approval of the GLP-1 pill for weight loss in the UK.

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