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The Blind Spot

The industry that forgot its workforce

Rosanna Tucker · CEO, CoverMe · 15 September 2026

Ask anyone running a venue how many members walked through the door last year and they'll give you a number to the nearest thousand. Ask how many classes got cancelled because nobody could find cover, and you'll get a shrug.

That gap is what this paper is about. Health, fitness and wellness has turned into one of the best-measured consumer sectors in Britain. It has also become one of the worst-measured labour markets in the country. Two facts sitting side by side that shouldn't really be true at the same time.

This isn't an opinion piece. It's an audit. We went back through the industry's own flagship report, counted what it counted, and wrote down what it left out.

12.2m	5,842	£6.5bn	679m
MEMBERS	CLUBS	MARKET VALUE	VISITS A YEAR

Source: UK Health and Fitness Market Report, ukactive and 4GLOBAL, 2026

01 A £6.5bn industry that counts everything

Every year, the UK Health and Fitness Market Report puts hard numbers on this industry, and it does it well. 12.2 million members. 5,842 clubs. £6.5 billion in value. 679 million visits. That level of detail puts fitness ahead of most consumer sectors in Britain, and the report earns that reputation.

None of that is in dispute. Operators know their retention rate to a decimal point. They know which class slots sell out and which ones limp along. That's not the blind spot. If anything, it's proof that a blind spot can sit right next to genuinely excellent data.

02 The people delivering it barely register

So, we went looking for the people behind those 679 million visits. The instructors, the PTs, the lifeguards, the class cover that keeps a timetable standing up. What we found was a passing mention. Not a chapter. Not a trend line. Not a data table. One line, in a report that otherwise measures this industry to the nearest million.

That's not anyone's fault, and it's worth saying plainly: this isn't negligence. It's what happens to anything that never had infrastructure built around it. It stops being counted, and once something stops being counted, it stops being managed.

No system anywhere tells an operator, at industry scale, how many sessions were cancelled for lack of staff last month, how many shifts went unfilled, or how many qualified people were sitting available and unbooked on a Tuesday morning. Nobody withheld that data. Nobody ever built it.

A cancelled class isn't a scheduling problem. It's a cancelled membership with a delay on it.

03 A workforce business, whether the software admits it or not

Look at the shape of this market and the size of the gap starts to make sense. Over 91% of enterprises in the sector employ fewer than 49 people (CIMSPA, 2025). This isn't a handful of national chains running centralised rotas out of head office. It's thousands of small, local teams stitching cover together from freelancers and part-timers, morning after morning, just to open the doors.

Fitness has always run on flexible labour. What it's never had is the tools to match supply to demand while it's actually happening. That gap doesn't sit beside the £6.5 billion figure. It sits underneath it.

04 Twenty years of software, and none of it looked here

Where has two decades of investment in this industry actually gone? Into the side of the business that takes payment. Membership platforms, class booking, billing, consolidating fast, and doing their job well.

None of it was built to answer the question this paper is asking. None of it holds a record of who was qualified to cover a class, who was free that day, or what it cost to track them down and confirm them. Walk into most venues and the member side runs in real time: booking, paying, checking in, instant. The workforce side still runs on a phone call, a spreadsheet, and whoever picks up first.

The floor

There's a word for the part of the business this paper keeps circling back to. Not the office. Not the app. The floor. It's the place where a class either has an instructor standing in it or it doesn't, where a shift is either covered or it isn't, and where every other part of the operation is waiting on that one answer landing before a member walks in.

The floor is where this industry's biggest cost line and its entire ability to deliver anything sit together, largely unmeasured. It's a place first, a system a venue could actually run on second, and eventually, a market in its own right. Making that case in full isn't this paper's job. Naming what's been missing is.

The UK's £6.5bn fitness industry counts everything except the people who deliver it. That's the finding. What happens next is the next four papers.

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Built for the floor.