HEALTH & FITNESS
ASSOCIATION

US FITNESS INDUSTRY TRAFFIC TRACKER

Q1 2026

The Health & Fitness Association's Fitness Industry Traffic (FIT) Tracker offers a data-driven view into visitation trends across US commercial fitness facilities. Drawing on anonymized foot traffic data from more than 10,000 locations across the United States, the tracker analyzes visitation patterns by facility type, region, and demographic profile.

US Fitness Facilities Mark 20 Consecutive Quarters of Foot-Traffic Growth

First-quarter visits to commercial fitness facilities increased on an annual basis, extending the industry's growth streak even as trends diverged across segments.

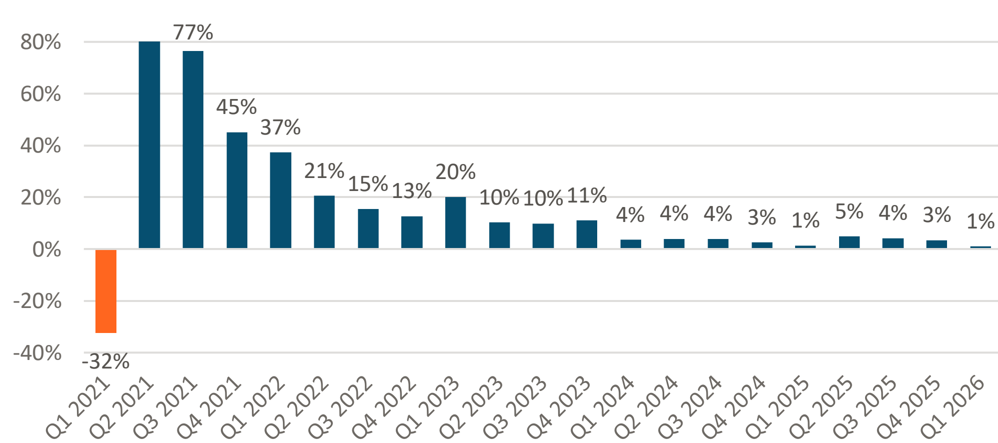
US commercial fitness facilities opened 2026 with a record volume of average foot traffic per location, marking the 20th consecutive quarter of year-over-year growth. Commercial facilities averaged more than 48,500 visits per location in the first quarter (Q1), reflecting a 1.0% increase compared with the same period in 2025. Foot traffic growth was led by high-volume, low-price (HVLP) and boutique gyms, while foot traffic to mid-priced and luxury facilities declined.

Meanwhile engagement trends softened slightly. Average monthly visits per visitor declined 1.3% year-over-year, suggesting that gains in overall foot traffic volume were driven more by participation than by increased visit frequency. The findings are based on anonymized visitation data from 10,290 commercial fitness facilities nationwide.

US Fitness Industry Visitation Trends (Q1 2026)

Metric	Total Industry	HVLP	Mid-Priced	Luxury	Boutique
Visits/Location	48,530	96,953	38,460	149,803	11,237
YoY Visits/Location	1.0%	1.2%	-1.2%	-4.8%	1.0%
Visits/Visitor/Month	3.9	4.1	4.0	5.2	2.5
YoY Visits/Visitor/Month	-1.3%	-1.0%	-1.6%	-0.2%	-2.7%
Dwell Time (mins)	66	68	67	86	63

Quarterly Visits Per Location, Change Year-Over-Year (2021-2026)*



*Total industry visitation in Q2 2021 was +285% year-over-year.

HVLP Continues to Lead the Industry

HVLP and boutique gyms led first-quarter foot traffic growth, while visitation declined in mid-priced and luxury segments.

HVLP gyms continued to show steady momentum at the start of 2026. Average visits per location increased 1.2% year-over-year to nearly 97,000, marking a segment record for first-quarter foot traffic. On an indexed basis, HVLP visitation reached 106 (with Q1 2019 = 100), indicating traffic levels 6% above pre-pandemic norms. Despite the increase in overall visits, engagement softened slightly, with average visit frequency per member declining 1.0%.

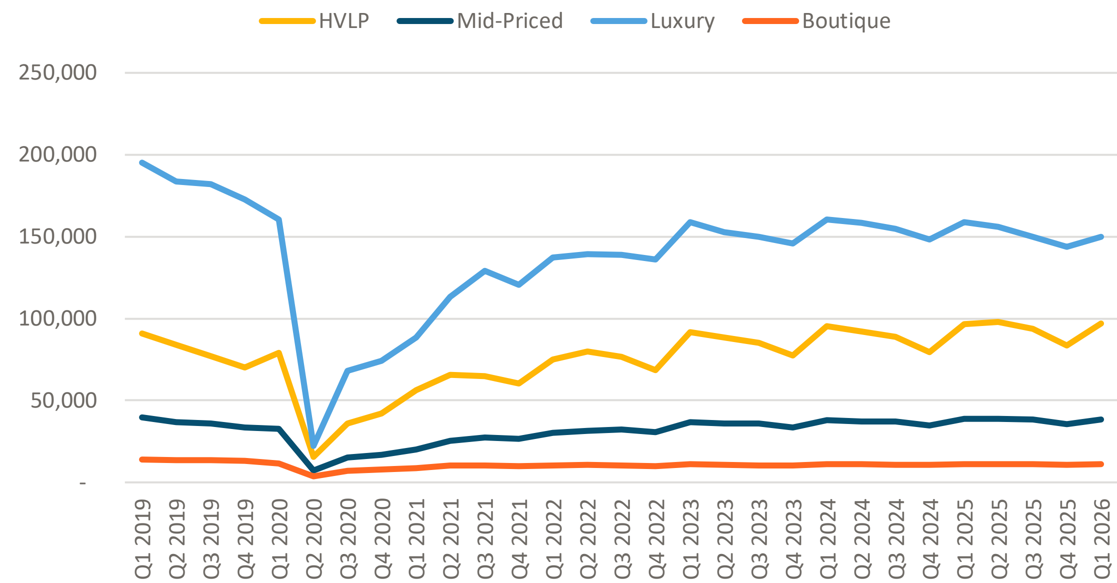
Mid-priced gyms saw a modest pullback in Q1. Average visits per location fell 1.2% year-over-year, with an index score of 97, placing the segment 3% below pre-pandemic levels. Visit frequency declined 1.6%, reflecting weaker engagement alongside lower overall traffic.

Luxury clubs averaged nearly 150,000 visits per location in Q1, a 4.8% decrease compared with the same period in 2025. Indexed visitation stood at 77, or 23% below 2019 levels, highlighting the segment's slower recovery. While traffic declined, luxury facilities continue to generate the highest volume of visits on a per-location basis. Members averaged 5.2 visits per month, roughly flat year-over-year, and continued to record the longest dwell times across segments.

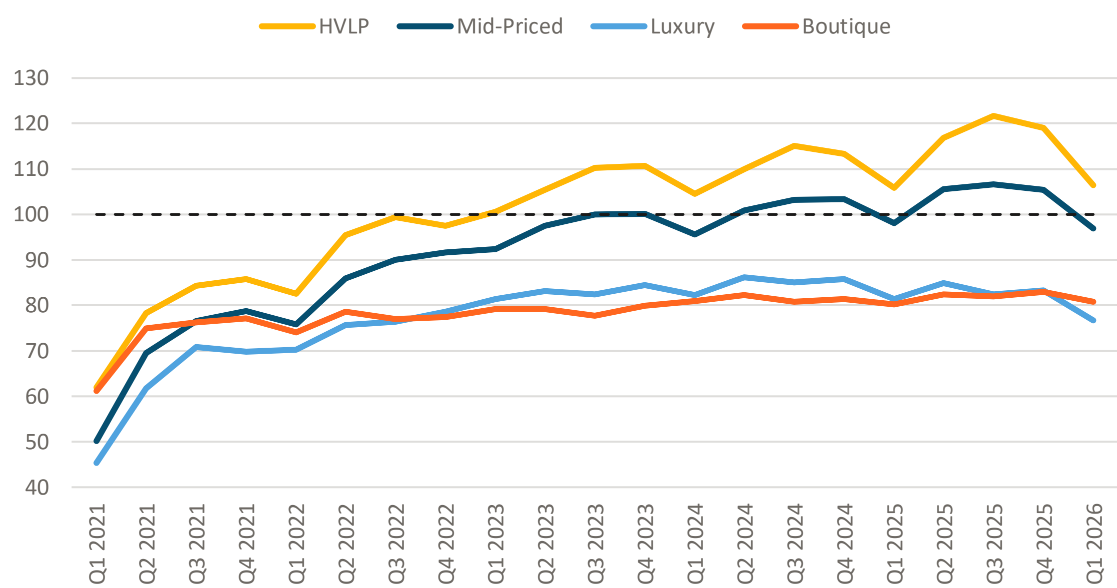
Some of the softness in mid-priced and premium segments may reflect broader macroeconomic pressures, particularly declining consumer confidence at the start of the year. According to the University of Michigan, consumer sentiment was down on average 14% compared to the same start of 2025 and 29% relative to 2024. This weakening outlook may be prompting some consumers to reassess discretionary spending, including fitness, and shift toward more budget-friendly options such as HVLP facilities.

Boutique studios posted modest growth, with visits per location increasing 1.0% year-over-year. The segment recorded an index value of 81, remaining below pre-pandemic levels but largely stable over time. Since early 2023, boutique visitation has fluctuated within a narrow range, suggesting a consistent base of returning users. However, visit frequency declined 2.7% in Q1, a larger drop than in other segments. This may reflect the segment's pricing structure, where flexible or class-based models can make attendance more sensitive to short-term changes in consumer behavior.

Quarterly Visits per Location (2019-2026)



Quarterly Visits per Location Index* (2021-2026)



*An index value of 100 represents the average quarterly traffic over the same quarter in 2019.

The January Effect Weakens as Visitation Patterns Normalize

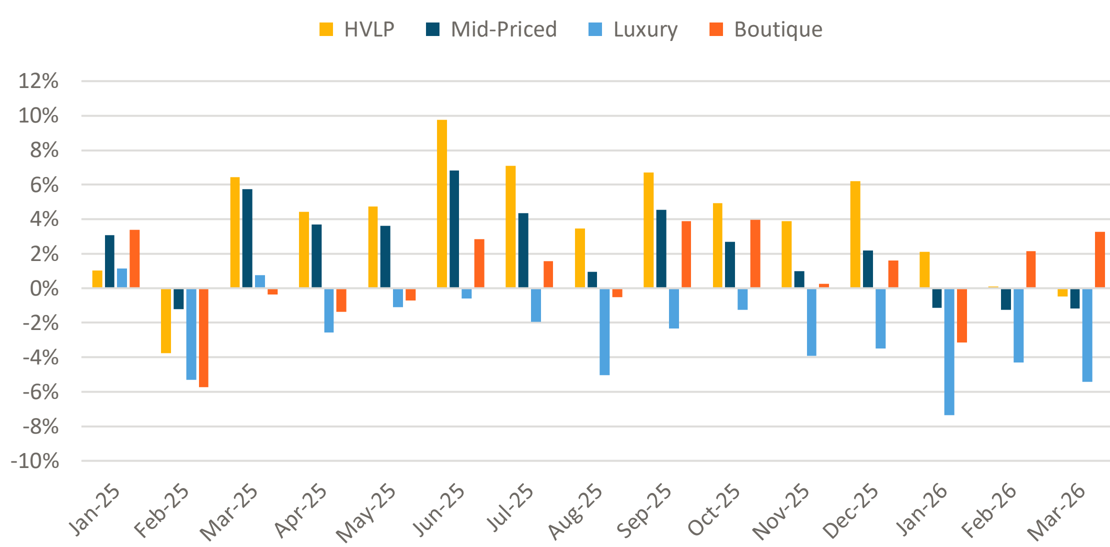
Monthly trends in early 2026 show stable overall demand, with performance increasingly driven by price segment and a moderating New Year visitation surge.

Foot traffic to HVLP gyms continued to demonstrate relative stability, with modest year-over-year growth in January (+2%) followed by flat performance in February and March. Mid-priced facilities experienced slight but consistent declines across all three months (-1% each month), while the luxury segment saw the most pronounced contraction, with visitation down significantly year-over-year throughout the quarter, including a -7% decline in January and continued declines in February (-4%) and March (-5%).

Boutique studios showed a more mixed but improving pattern. After a decline in January (-3%), visitation returned to growth in February (+2%) and March (+3%), suggesting stabilization in this segment.

Overall, Q1 2026 data indicates that while the industry remains relatively stable at an aggregate level, performance is increasingly segmented, with lower-cost formats continuing to outperform higher-priced models.

Monthly Visits Per Location, Change Year-Over-Year (2025-2026)

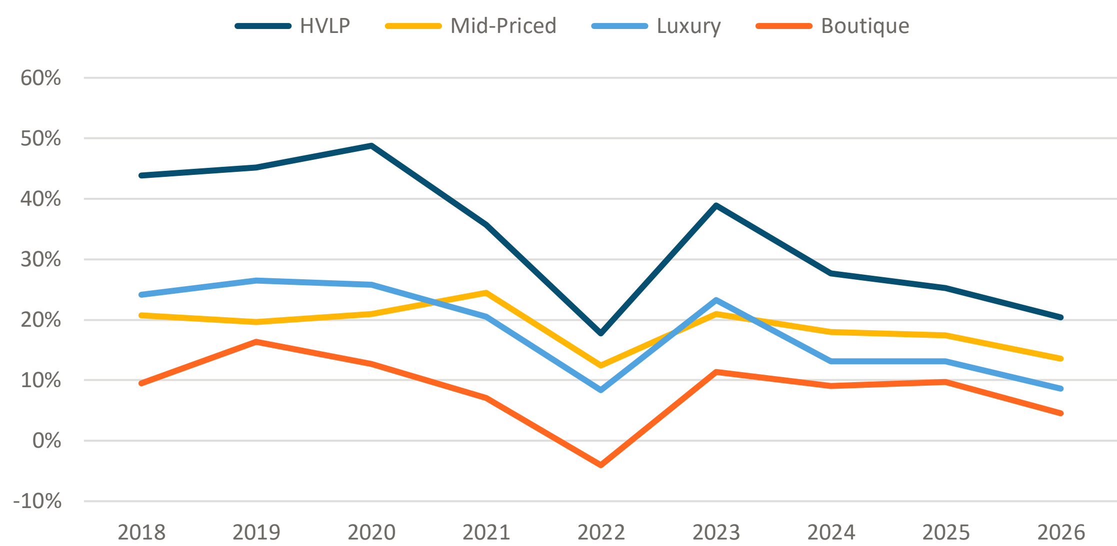


Month-over-month visitation data continue to reflect the fitness industry's well-established seasonal pattern, with late fall and early winter consistently marking the weakest period of the year across all facility segments in terms of absolute foot traffic volume. This is followed by a pronounced increase in January, driven by new year goal-setting behavior.

However, the magnitude of the traditional "New Year surge" has moderated in recent years. Across all segments, the increase in visitation from December to January remains significant but has become less pronounced compared to pre-pandemic levels. For example, HVLP gyms saw January visitation rise 44–49% above December levels between 2018 and 2020, compared to a 20% increase in 2026. A similar pattern is observed in mid-priced (from ~20–21% pre-pandemic to 14% in 2026), luxury (mid-20% range to 9%), and boutique studios (double-digit increases to 5%).

Although January still represents a clear seasonal inflection point, the data suggests that its relative importance as the primary driver of annual traffic spikes has diminished in recent years. The gradual normalization of demand aligns with broader trends observed in quarterly data. Visitation patterns have become more evenly distributed throughout the year, and other quarters are playing a larger role in driving overall annual performance, as indicated by the indexed visitation values.

December-to-January Visitation Change by Segment (2018–2026)



Pacific Leads While Regional Performance Diverges Across Segments

Early 2026 trends saw a more fragmented geographic landscape, with fewer regions demonstrating broad-based growth across segments and clearer divergence tied to pricing tiers.

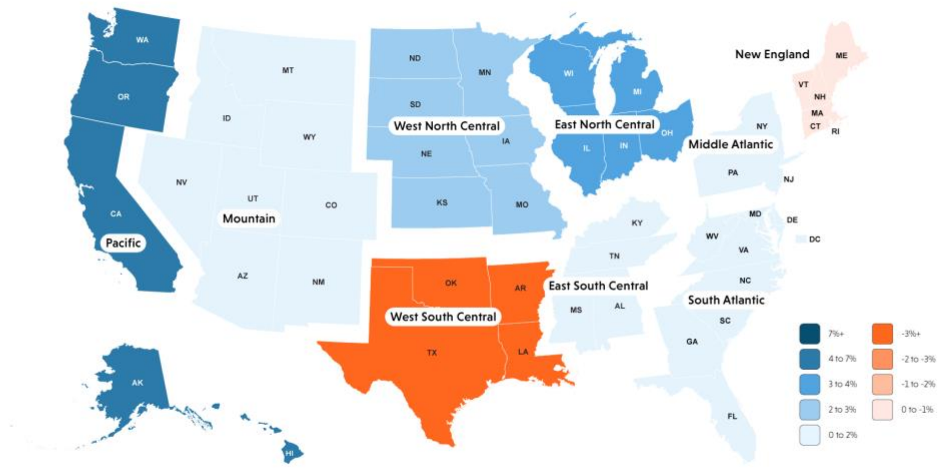
The Pacific division (CA, OR, WA, AK, HI) stands out as the most consistently strong region at the start of 2026, posting the highest growth in both HVLP (+5.5%) and mid-priced (+4.5%) segments. This indicates continued demand strength in more accessible price points along the West Coast, even as other regions show signs of softening. The East North Central (IL, IN, MI, OH, WI) and West North Central (IA, KS, MN, MO, NE, ND, SD) divisions also performed relatively well in the HVLP segment, with gains of +3.2% and +2.9%, respectively.

By contrast, mid-priced gyms experienced declines across most of the country, with only the Pacific and Mountain (AZ, CO, ID, MT, NV, NM, UT, WY) regions maintaining growth. The sharpest contraction occurred in the West South Central (AR, LA, OK, TX) (-6.3%), with additional declines across the South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV) (-4.9%) and East South Central (AL, KY, MS, TN) (-3.2%), suggesting broader pressure in these markets.

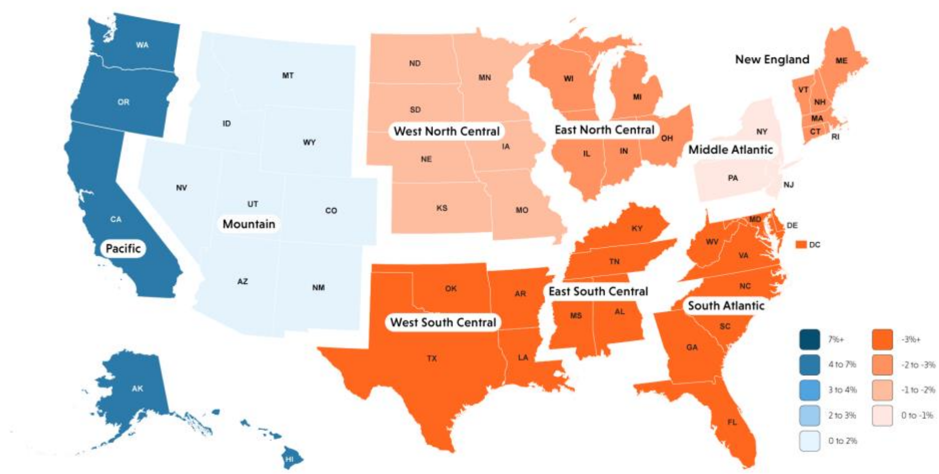
The luxury segment continued to face headwinds nationwide, with visitation down across all census divisions. Declines were relatively consistent, ranging from -2.3% in the East North Central to -6.8% in the West North Central, reinforcing the segment's sensitivity to current economic conditions.

Boutique studios showed a more mixed but generally stable regional pattern. Growth was concentrated in select markets, including the West North Central (+4.0%), South Atlantic (+3.1%), and New England (CT, ME, MA, NH, RI, VT) (+2.6%), while most other regions saw minimal declines or flat performance.

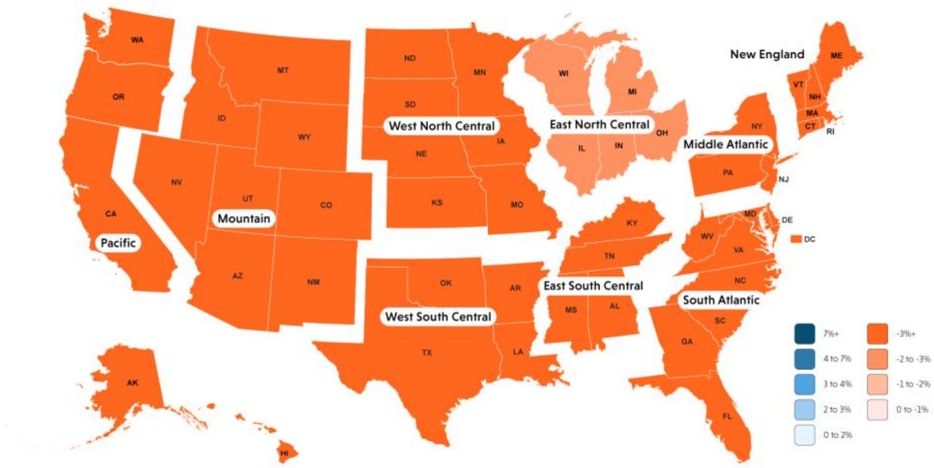
HVLP: Q1 2026 Visits per Location, Year-over-Year



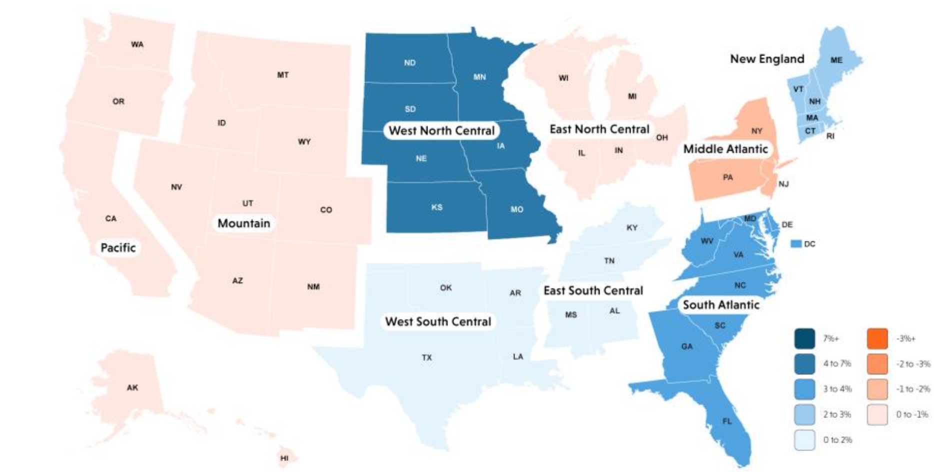
Mid-Priced: Q1 2026 Visits per Location, Year-over-Year



Luxury: Q1 2026 Visits per Location, Year-over-Year



Boutique: Q1 2026 Visits per Location, Year-over-Year



Demographics Remain Largely Stable Across Segments

Demographic patterns among commercial fitness facility visitors remained relatively stable in the first quarter of 2026.

Demographic trends in Q1 2026 show minimal year-over-year movement across income, age, and diversity. Average household income increased slightly across most segments, led by mid-priced (+0.6%) and HVLP (+0.5%), while luxury (+0.1%) and boutique (-0.1%) remained essentially flat. As in prior periods, luxury and boutique facilities continue to attract the highest-income visitors.

Average age was largely unchanged across the industry (+0.1% overall), with only marginal variation between segments. Diversity also remained stable, with small declines at the industry level (-0.5%) and in HVLP and mid-priced segments, while luxury and boutique saw modest increases.

Average Visitor Demographics (Q1 2026)

Metric	Total Industry	HVLP	Mid-Priced	Luxury	Boutique
HHI	$119,696	$105,227	$124,152	$194,264	$152,073
YoY HHI	0.2%	0.5%	0.6%	0.1%	-0.1%
Age	38.1	37.86	38.17	38.92	38.4
YoY Age	0.1%	0.1%	0.1%	0.0%	-0.1%
Diversity (% PoC)	44.7%	45.0%	48.9%	35.4%	35.8%
YoY Diversity	-0.5%	-0.7%	-0.4%	0.3%	0.4%

About the US Fitness Industry Traffic Tracker

The report is based on data from the Health & Fitness Association's US Fitness Industry Traffic (FIT) Tracker, developed in partnership with Sports Marketing Surveys USA (a Buffalo Groupe company) and powered by Placer.ai. The FIT Tracker provides anonymized, aggregated foot traffic metrics from a national panel of commercial fitness facilities.

The analysis reflects data from nearly 11,000 individual locations, capturing approximately one-in-five US commercial fitness facilities and spanning four segments of the industry: High-Volume, Low-Price (HVLP) gyms, mid-priced gyms, luxury clubs, and boutique gyms

Data Collection

The FIT Tracker uses opt-in mobile location data from a national panel of more than 70 million US adults, with an eight-year historical lookback. Movement patterns are captured using geofences (digital boundaries) placed around each tracked fitness facility. To ensure data accuracy, visits from employees and residents of the geofenced location are excluded based on dwell time and timing patterns.

Once a visit is recorded, the system anonymously associates that visitor with a home location block group (not an exact address), allowing for deeper analysis of geographic reach and user demographics. This includes identifying the top ZIP codes, cities, DMAs, and states contributing visitors to each location. All personal data is obfuscated to protect privacy; individual-level data is never accessible. These metrics are modeled and should not be interpreted as precise population statistics.

Metrics

Visits per Location: Total number of visits divided by number of tracked facilities in each category

Visits per Visitor per Month: Average monthly frequency of visits per unique visitor

Dwell Time: Average duration of each visit (in minutes)

Diversity: Percentage of visitors identifying as people of color, based on modeled demographic data

Impact of Facility Openings/Closures

Visits per Location is calculated using all locations that recorded at least one visit during the period. As a result, newly opened clubs are included in the average, which may slightly lower the metric during times of net unit growth, since new facilities typically take time to build consistent visitation. This dynamic should be kept in mind when interpreting year-over-year trends.

Segment Definitions

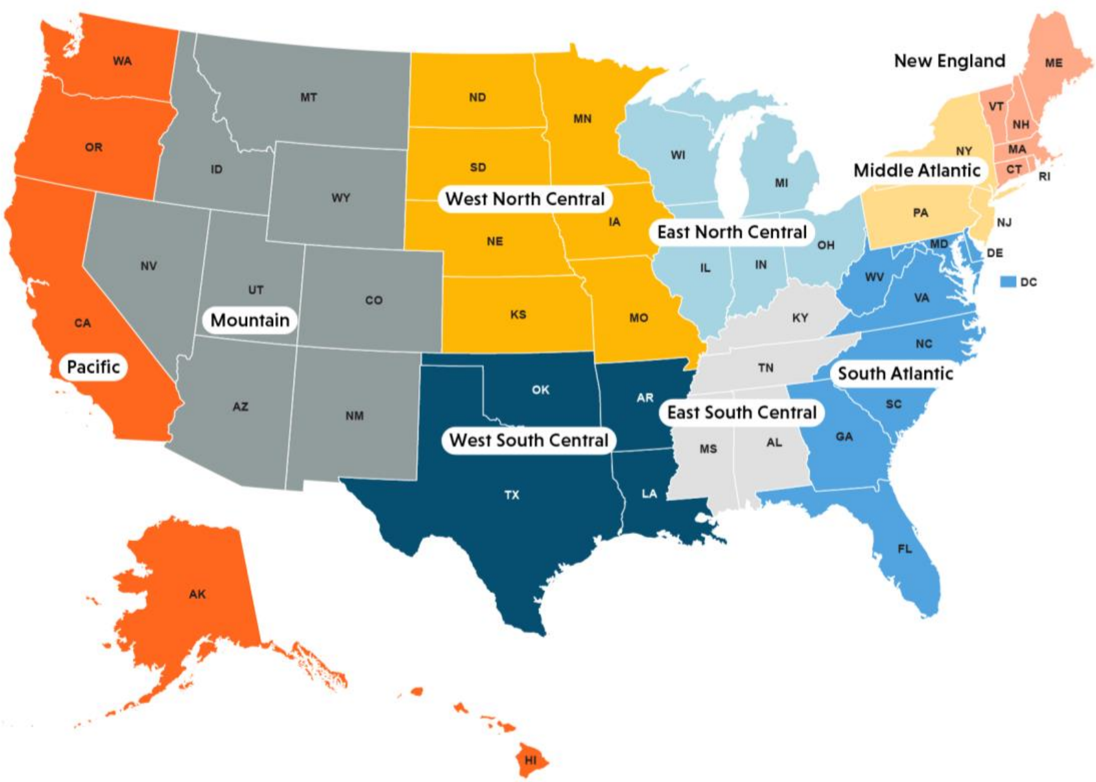
High-Volume, Low-Price (HVLP): Large, value-focused gyms that offer basic strength and cardio equipment at a low monthly price point. These clubs often operate with minimal staffing and limited amenities. Examples include Planet Fitness, Crunch Fitness, and EōS Fitness.

Mid-Priced: Full-service fitness centers offering a mix of equipment, group classes, and basic amenities. This category includes national chains and regional operators such as Anytime Fitness, LA Fitness, and Gold's Gym.

Luxury: Premium facilities with extensive amenities such as pools, spas, boutique-style classes, co-working areas, and wellness services. Notable examples include Equinox, Life Time, and The Bay Club.

Boutique: Smaller, boutique-style gyms and studio fitness businesses focused on a specific format or modality (e.g., yoga, cycling, HIIT, Pilates). Boutique gyms typically operate on class packs or unlimited user packages/memberships and include brands such as Orangetheory Fitness, F45, and Pure Barre.

U.S. Census Divisions Used in Regional Analysis



Additional Data Access

Custom data cuts are available to Health & Fitness Association (HFA) members upon request. Please contact Anton Severin, HFA Vice President of Research, for more information.
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