

HEALTH & FITNESS ASSOCIATION

US FITNESS INDUSTRY TRAFFIC TRACKER

Q2 2026

The Health & Fitness Association's Fitness Industry Traffic (FIT) Tracker provides 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.

Fitness Traffic Slows in Q2, but June Rebound Signals Resilience

Commercial fitness facility traffic softened slightly in the second quarter of 2026 as average visits per location contracted 0.5% from the same period in 2025.

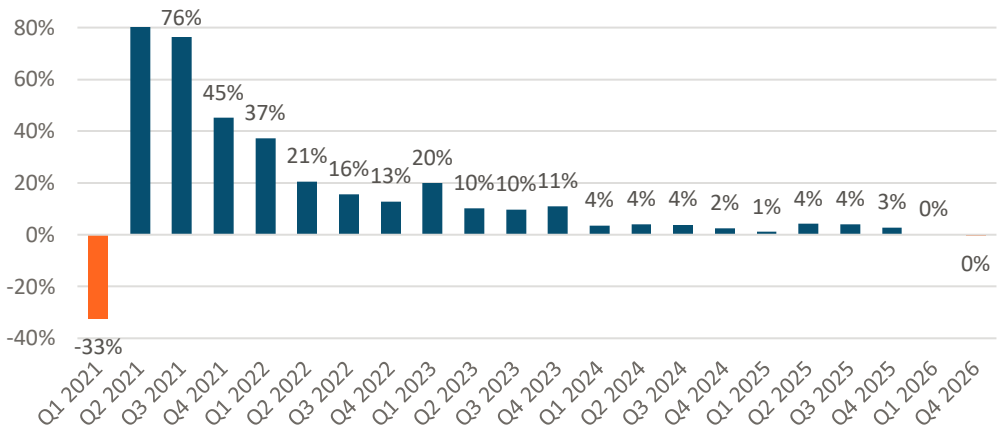
US commercial fitness facilities averaged 48,805 visits per location in the second quarter of 2026, down 0.5% from an all-time high 2025 comparison. The decline marked the industry's first year-over-year quarterly contraction since the start of 2021. Even so, average visitation remained 1.5% ahead of last year through the first half of 2026.

Quarterly performance also became more segmented. Boutique studios accelerated to 2.5% growth and was the only segment to increase year-over-year. High-value, low-price (HVLP) traffic edged down 0.2%, while mid-priced and luxury facilities declined 1.7% and 2.3%, respectively. Luxury's decline nevertheless narrowed from a 4.8% contraction in the first quarter.

Q2 2026 Visitation per Location by Fitness Facility Type

Metric	Total Industry	HVLP	Mid-Priced	Luxury	Boutique
Visits/Location	48,805	96,814	37,975	149,835	11,456
YoY Visits/Location	-0.5%	-0.2%	-1.7%	-2.3%	2.5%

Quarterly Visitation per Location, Change Year-Over-Year (2021-2026)*



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

In the first six months of 2026, monthly visits per visitor declined 1.3% across the industry after rising 1.1% last year, with decreases observed for all four segments. The combination of positive year-to-date traffic and lower frequency suggests that traffic is being supported more by visitor reach than by increased usage among the average visitor.

Year-to-Date Visitation per Location by Fitness Facility Type

Metric	Total Industry	HVLP	Mid-Priced	Luxury	Boutique
Visits/Location	97,274	192,816	76,080	299,731	22,536
YoY Visits/Location	1.5%	0.5%	-1.2%	-3.5%	2.0%
Visits/Visitor/Month	3.8	4.0	3.9	5.1	2.5
YoY Visits/Visitor/Month	-1.3%	-1.0%	-1.7%	-0.7%	-2.4%
Dwell Time (mins)	66	68	67	86	63

Boutiques Gain Ground as HVLP Visitation Holds Near Record Levels

Compared with late 2025 and the first quarter of 2026, second-quarter performance shifted toward boutiques, while HVLP traffic plateaued and higher-priced segments remained uneven.

HVLP facilities averaged 96,814 visits per location in the second quarter, down 0.2% from 2025. The segment's index remained at 116, matching last year's record second-quarter level and leaving traffic 16% above its second quarter 2019 baseline. Against an unusually strong comparison, the result is better characterized as a plateau than a meaningful reversal as HVLP traffic remains above the corresponding pre-pandemic level in every quarter since early 2023.

Through the first half of the year, HVLP visits per location increased 0.5%, even as monthly frequency declined 1.0% to 4.0 visits. This marks a sharp slowing from 2025, when annual traffic rose 4.5% and frequency increased 1.3% but indicates that the segment has retained most of its post-pandemic traffic gains.

Mid-priced gyms averaged 37,975 visits per location in the second quarter, down 1.7% year-over-year and a slightly deeper contraction than the 1.2% decline recorded in the first quarter. The segment's index fell from 105 to 103 as traffic remained 3% above its second quarter 2019 baseline.

Year-to-date visits declined 1.2%, while monthly frequency fell 1.7% to 3.9 visits. Following 2.8% traffic growth and a modest frequency gain in 2025, the first-half results point to a broader loss of momentum for the mid-priced segment across both reach and regularity of use.

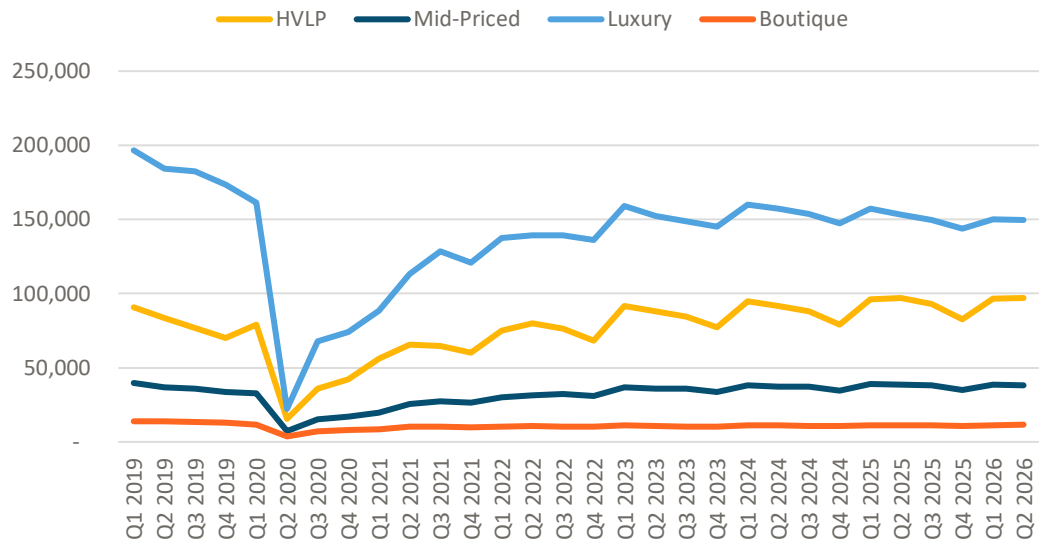
Luxury clubs continued to record the highest absolute traffic, averaging 149,835 visits per location, but remained 2.3% below the same period in 2025 and 19% below their pre-pandemic baseline. The pace of the contraction narrowed materially from 4.8% in the first quarter and to just 1% in June, indicating that the segment's traffic gap moderated as the first half of 2026 progressed.

Through June, luxury visits per location were down 3.5%. Engagement remained comparatively resilient. Visitors averaged 5.1 monthly visits, down 0.7%, and an 86-minute dwell time. The results suggest that overall visitation remains under pressure, but visitation frequency among active users has held up comparatively well.

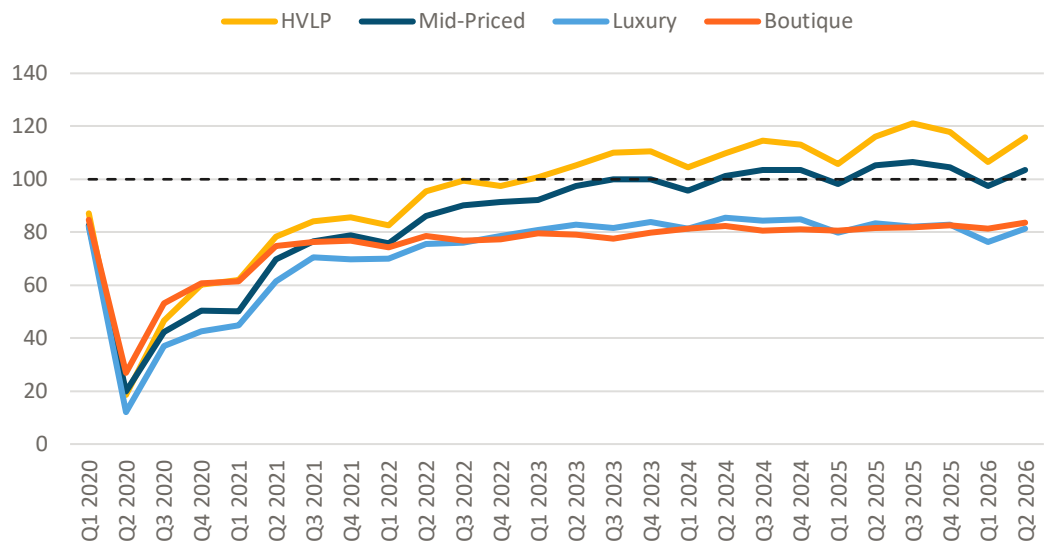
Boutique studios delivered the clearest improvement, with second quarter visits per location rising 2.5% to 11,456 after increasing 1.0% in the first quarter. The segment's index reached 84, its strongest second-quarter reading since the pandemic, and growth extended across seven of nine Census divisions. Traffic nevertheless remained 16% below the second quarter 2019 baseline.

Year-to-date boutique traffic increased 2.0%, while average frequency declined 2.4% to 2.5 monthly visits, the largest decrease among the four segments. The combination suggests that growth has been supported by a larger visitor base, including more occasional users, rather than more frequent attendance by the average visitor.

Quarterly Visits per Location (2019-2026)



Quarterly Visits per Location Index* (2020-2026)



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

Spring Softness Gives Way to Broad June Rebound

The industry's April-May slowdown coincided with weaker consumer confidence and renewed inflation pressure before conditions and visitation improved in June.

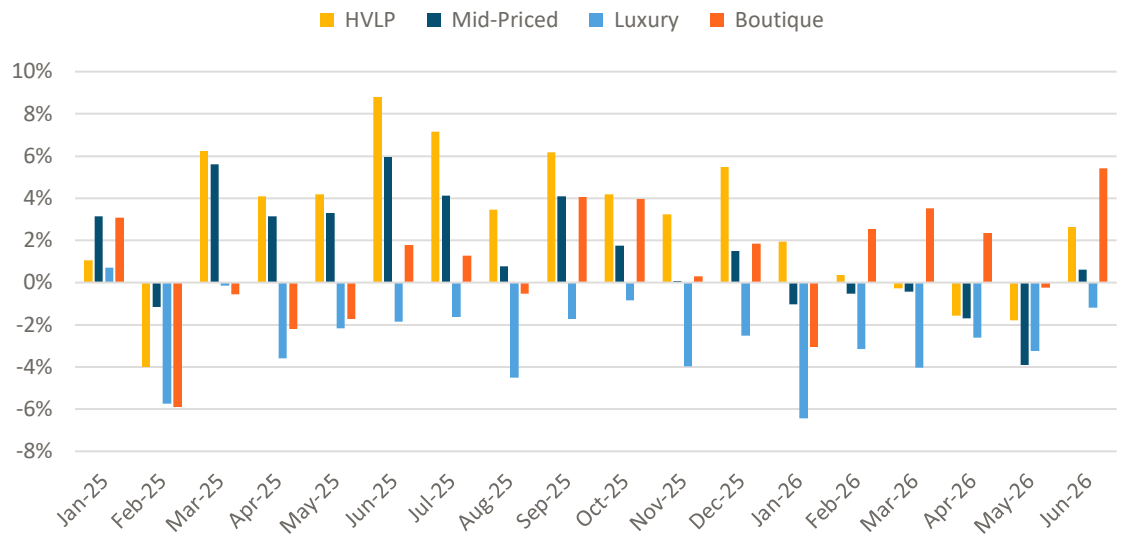
HVLP traffic was up 2% in January and flat in February and March before declining 2% in both April and May. It returned to 3% year-over-year growth in June. Mid-priced facilities followed a similar but softer path, moving from small declines early in the year to a 4% drop in May before recovering to 1% growth in June.

Luxury traffic remained below prior-year levels in every month, but the deficit narrowed from 6% in January to 1% in June. Boutiques moved in the opposite direction, rebounding from a 3% January decline to gains in four of the next five months, including 5% growth in June.

Compared with 2025, the first-half pattern was notably less consistent. HVLP and mid-priced gyms had generated year-over-year gains in nearly every month of 2025, whereas both segments entered negative territory during spring 2026. Boutiques, by contrast, shifted from modest stabilization in 2025 to the industry's most consistent growth in the second quarter.

The timing broadly aligned with changes in the consumer environment. The University of Michigan consumer sentiment index fell from 49.8 in April to 44.8 in May before rebounding 10.5% to 49.5 in June. At the same time, the Consumer Price Index rose 0.6% in April and 0.5% in May before falling 0.4% in June, largely because energy and gasoline prices declined. These parallel movements provide plausible context but do not establish that macroeconomic conditions directly caused the visitation changes.

Monthly Visits per Location, Change Year-over-Year (2025-2026)

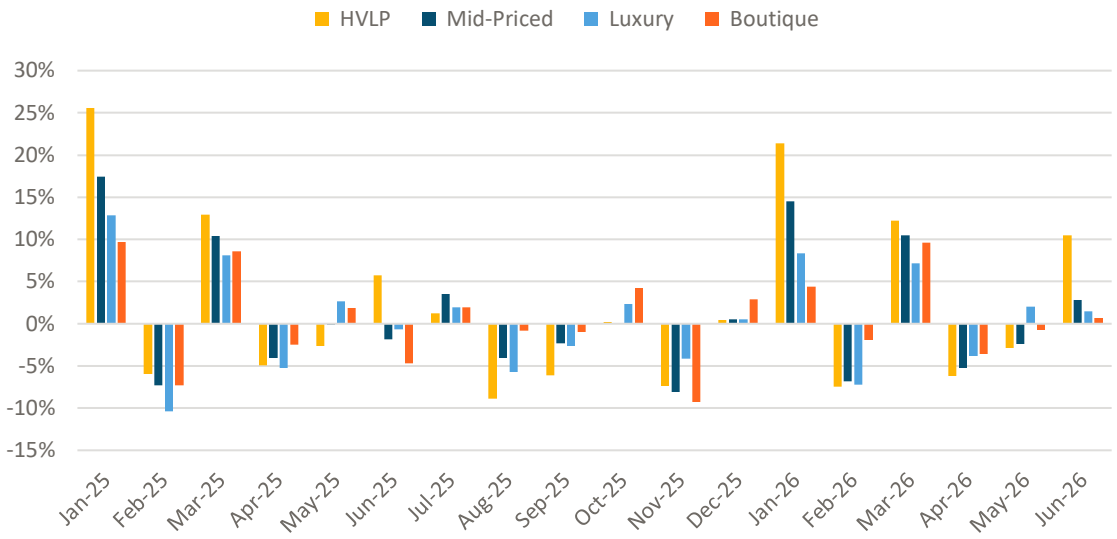


Month-over-month performance continued to reflect familiar seasonality. A strong January increase, February pullback, and March rebound were followed by declines across all four segments in April. May remained weak for HVLP, mid-priced, and boutique facilities, while luxury traffic edged higher.

June provided the clearest sign of stabilization. Visits rose 10% from May at HVLP gyms and increased 3% at mid-priced facilities and 1% at both luxury clubs and boutiques. All four segments also improved on a year-over-year basis compared with May.

Consumer spending continued to grow modestly in the spring. Bureau of Economic Analysis data show that real personal consumption expenditures increased 0.1% in April and 0.3% in May. This suggests consumers were becoming more selective about discretionary activities rather than broadly cutting back on services.

Monthly Visits per Location, Change Month-over-Month (2025-2026)



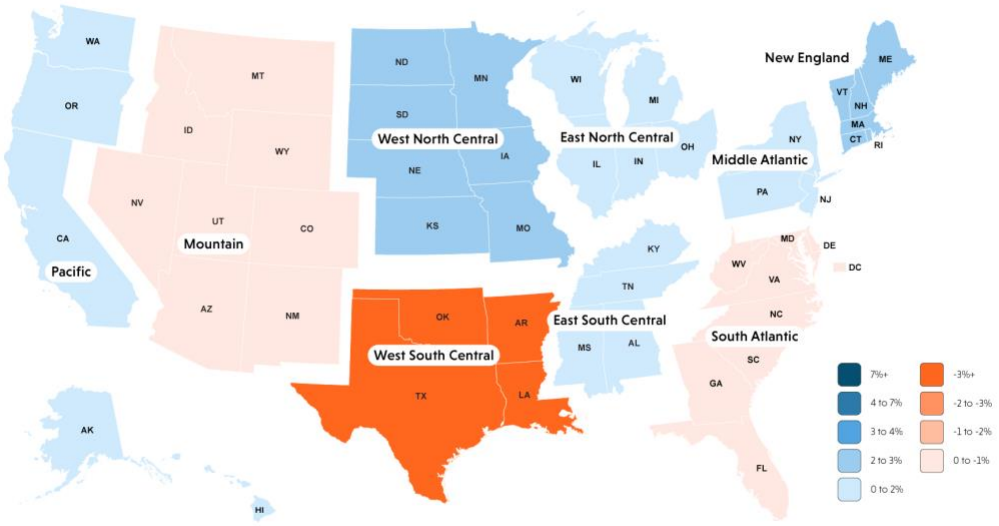
New England Leads an Uneven Regional Picture

Second quarter performance shifted away from the Pacific and Mountain divisions that led recent quarters, while New England emerged as the broadest outperformer and West South Central weakness persisted.

Regional leadership changed meaningfully during the quarter. The Pacific had led both HVLP and mid-priced growth in the first quarter, but second quarter gains slowed to 1.2% for HVLP and mid-priced traffic slipped 0.4%. The Mountain division also weakened after stronger results in late 2025 and early 2026. New England, by contrast, posted gains in HVLP, luxury and boutique visitation.

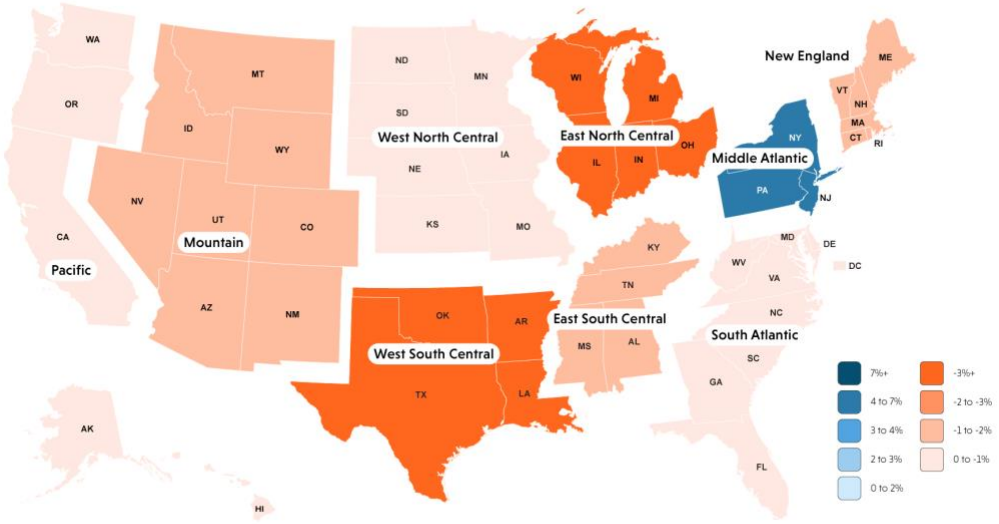
HVLP remained the most geographically resilient segment, with traffic increasing in six of nine divisions. West North Central (+2.5%), New England (+2.2%), and East North Central (+1.6%) led growth. West South Central fell 6.9%, extending a pattern of relative weakness that was already evident in Q4 2025.

HVLP: Q2 Visits per Location, Year-over-Year



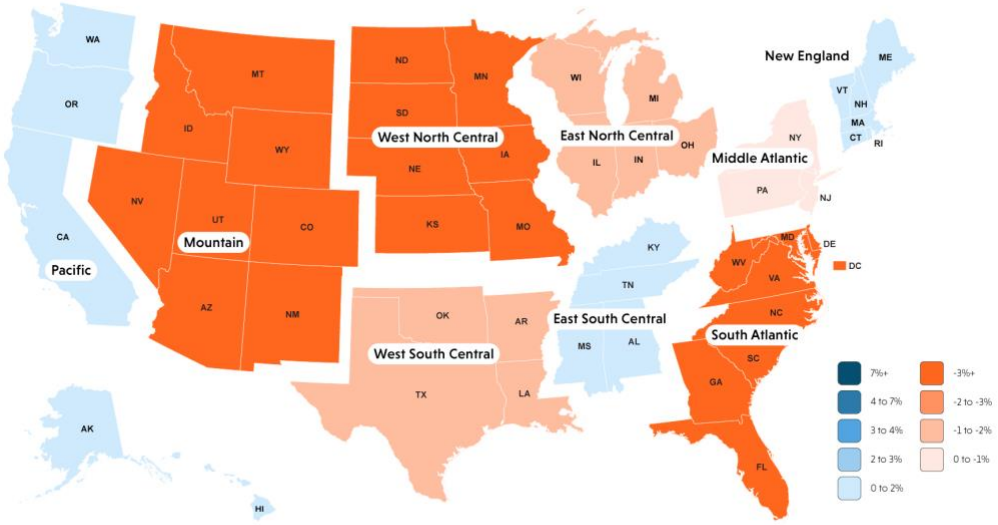
Mid-priced performance became more concentrated. The Middle Atlantic was the only division with meaningful growth, up 5.3%, while Pacific, South Atlantic, and West North Central were roughly flat. East North Central declined 4.3%, and West South Central fell 6.1% after also posting the segment's steepest first quarter contraction.

Mid-Priced: Q2 Visits per Location, Year-over-Year



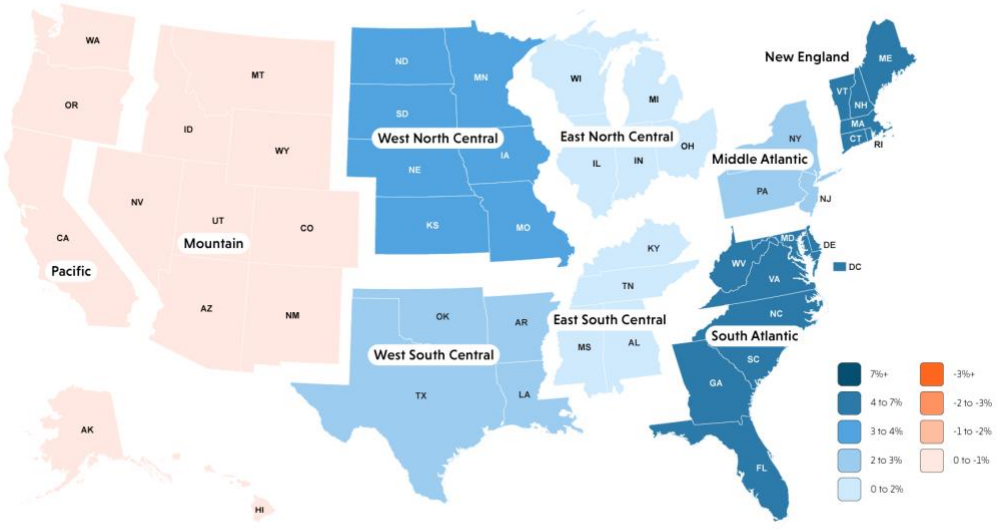
Luxury traffic improved from the broad declines recorded in the first quarter when every division was negative. New England grew 0.7%, while Pacific and East South Central were essentially flat. The Mountain, South Atlantic, and West North Central divisions remained the weakest, with declines ranging from 4.8% to 5.5%.

Luxury: Q2 Visits per Location, Year-over-Year



Boutique growth broadened substantially, reaching seven of nine divisions compared with more isolated pockets of strength in prior quarters. New England led at 6.9%, followed by South Atlantic at 4.5% and West North Central at 3.6%. Pacific and Mountain were the only negative divisions, and both declines were below 0.5%.

Boutique: Q2 Visits per Location, Year-over-Year



Taken together, the regional data suggest that the second quarter was characterized less by a uniform national slowdown than by shifting local conditions and segment mix. The persistence of West South Central weakness warrants further examination of market composition, new openings, and operator mix before attributing the pattern to regional economic conditions.

Visitor Demographics Remain Largely Stable

The demographic composition of fitness facility visitors remained broadly stable through the first half of 2026, with modest growth in household income and little change in visitor age. The overall share of visitors identified as people of color declined slightly.

Average household income (HHI) across the industry reached $122,545, up 0.4% from the first half of 2025. Luxury clubs continued to attract the highest-income visitors, averaging $198,119, followed by boutiques at $154,759 and mid-priced gyms at $127,252. HVLP facilities remained the most value-oriented segment, with average visitor income of $108,012 despite recording the strongest year-over-year increase, at 0.8%.

Visitor age was essentially unchanged, averaging 38.3 years industrywide. Luxury visitors remained the oldest at 39.1 years, while HVLP visitors were the youngest at 38.1 years.

People of color represented 46.0% of visitors, down 0.6 percentage point. Mid-priced gyms remained the most diverse segment at 49.9%, while diversity increased slightly among boutique visitors and declined modestly at HVLP and mid-priced facilities.

Average Visitor Demographics (YTD)

Metric	Total Industry	HVLP	Mid-Priced	Luxury	Boutique
HHI	$122,545	$108,012	$127,252	$198,119	$154,759
YoY HHI	0.4%	0.8%	0.5%	0.6%	0.0%
Age	38.3	38.1	38.4	39.1	38.6
YoY Age	0.0%	0.1%	0.0%	-0.1%	-0.1%
Diversity (% PoC)	46.0%	46.4%	49.9%	36.7%	37.0%
YoY Diversity	-0.6%	-0.8%	-0.5%	-0.0%	0.3%

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 more than 10,000 individual locations, capturing approximately one in five US commercial fitness facilities and spanning four segments of the industry: High-value, 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

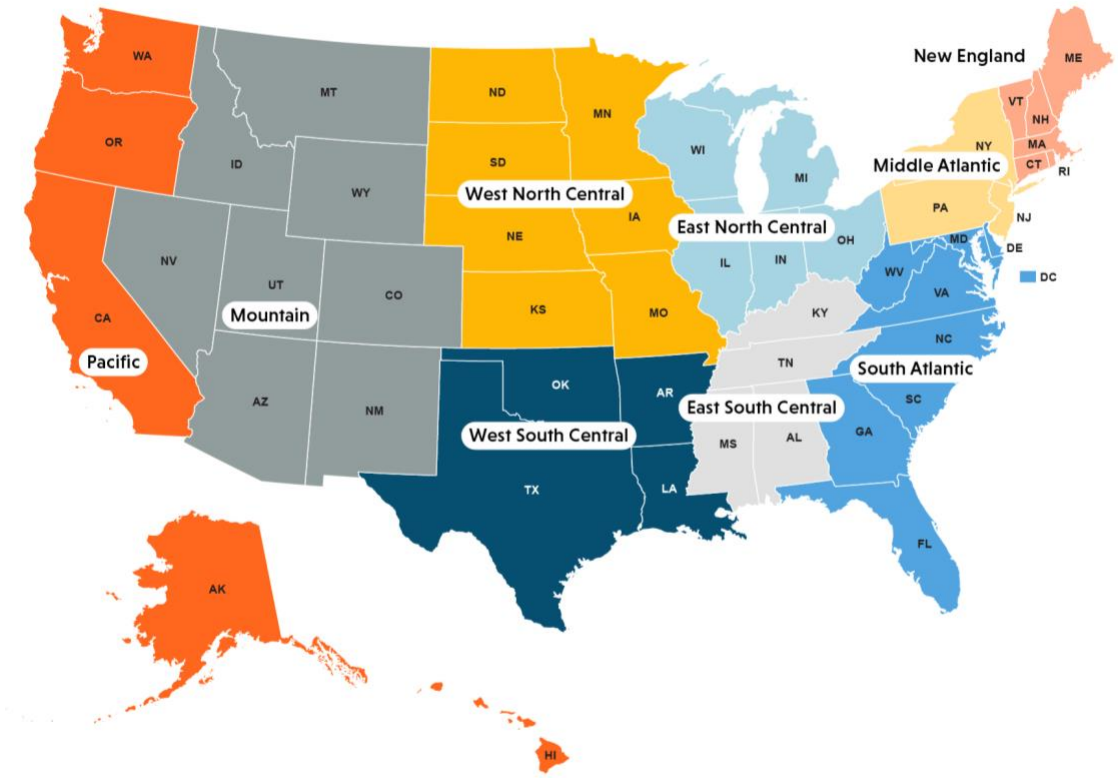
High-Value, Low-Price (HVLP): Large, value-focused gyms that offer basic strength and cardio equipment at a low monthly price point. These clubs often operate with minimal staffing and limited amenities. Examples include Planet Fitness, Crunch Fitness, and EōS Fitness.

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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