

The Current Pace of the Fitness Space

Dive into the data to explore recent visitation patterns and consumer trends in the fitness space – and uncover potential keys to success, rooted in location intelligence.



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Fitness Flexes Its Muscles

Like many industries in recent years, the fitness sector has experienced significant shifts in consumer behavior. From the rise in home workouts during the pandemic to the strain of hyper-inflation, foot traffic trends to gyms and health clubs have been as dynamic as the consumers they serve.

This report leverages location analytics to explore the consumer trends driving visitation in the fitness space and provides actionable insights for industry stakeholders.

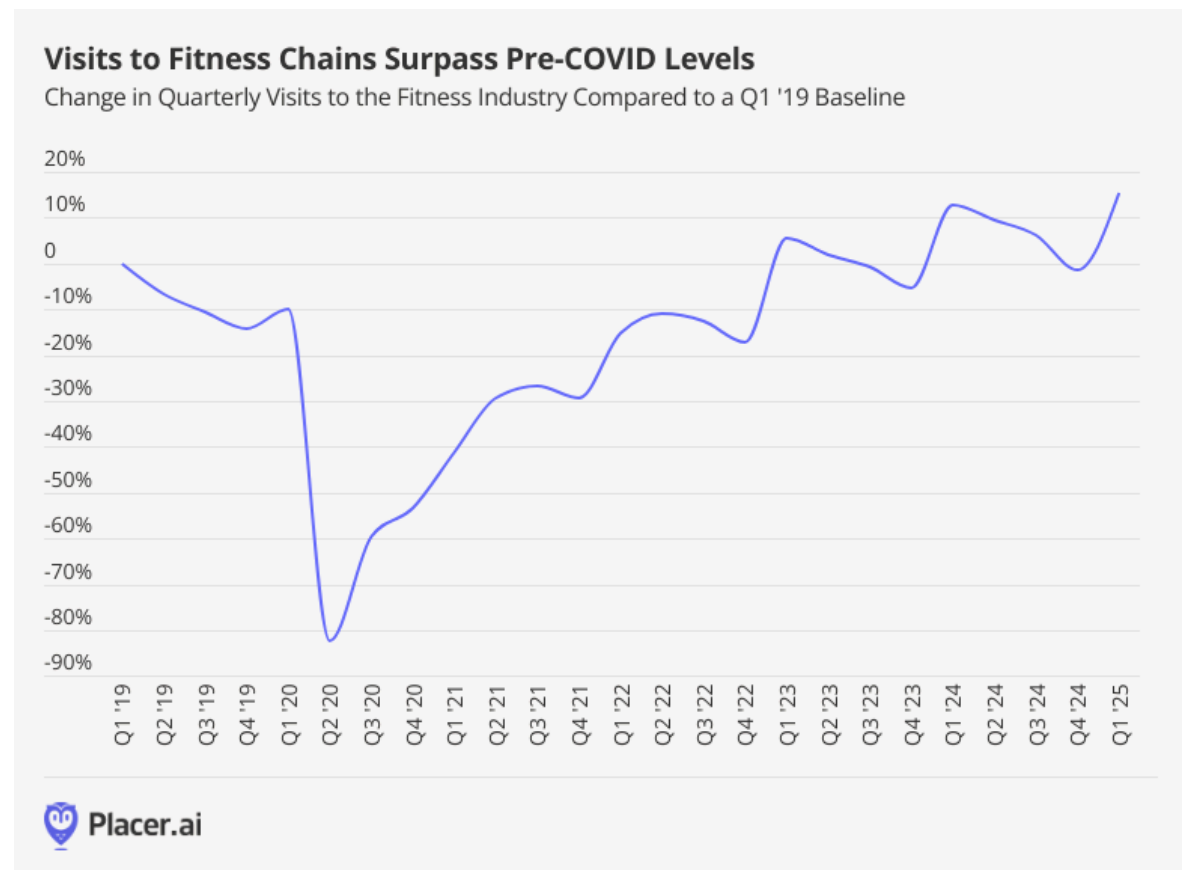
Back in Shape: The COVID Recovery

The pandemic drove several shifts in the fitness space. Widespread gym closures led consumers to embrace home-based workouts, while demand for all things fitness increased due to an emphasis on overall [health](#) and [wellness](#). This subsequently drove a renewed interest in gym-based workouts as restrictions lifted – even as some consumers remained committed to their home workout routines.

In Q1 2023, visits to fitness chains surpassed Q1 2019 levels for the first time since the onset of the pandemic, a sign that consumers had recommitted to out-of-home fitness. And in Q1 2024 and Q1 2025, fitness chains saw further growth, climbing to 12.8% and 15.5% above the Q1 2019 baseline, respectively.

Several factors have likely driven consumers' return to gyms and health clubs, including the desire for both social connection and professional-grade facilities difficult to replicate at home. The steep increase in cost of living has likely also played a role, since consumers cutting back on discretionary spending can enjoy multiple

outings and a range of recreational activities at the gym for one monthly fee.



Getting Gains: Strong Q1 '25

Zooming in on weekly visits to the fitness space in Q1 2025 reveals the industry's exceptional strength and resilience in the early part of the year.

The fitness industry experienced YoY visit growth nearly every week of Q1 2025 (and 2.4% YoY visit growth overall) with only minor visit gaps the weeks of [January 20th, 2025](#) and [February 17th, 2025](#) – likely due to extreme weather that prevented many Americans from hitting the gym.

And the fitness industry's weekly visit growth appeared to strengthen throughout the quarter, defying the typical [waning](#) of New Year's resolutions. This could indicate that

gym visits haven't plateaued and that consumers are demonstrating greater commitment to their fitness routines compared to last year.



Increasing Reps: Visitor Frequency Up At Leading Chains

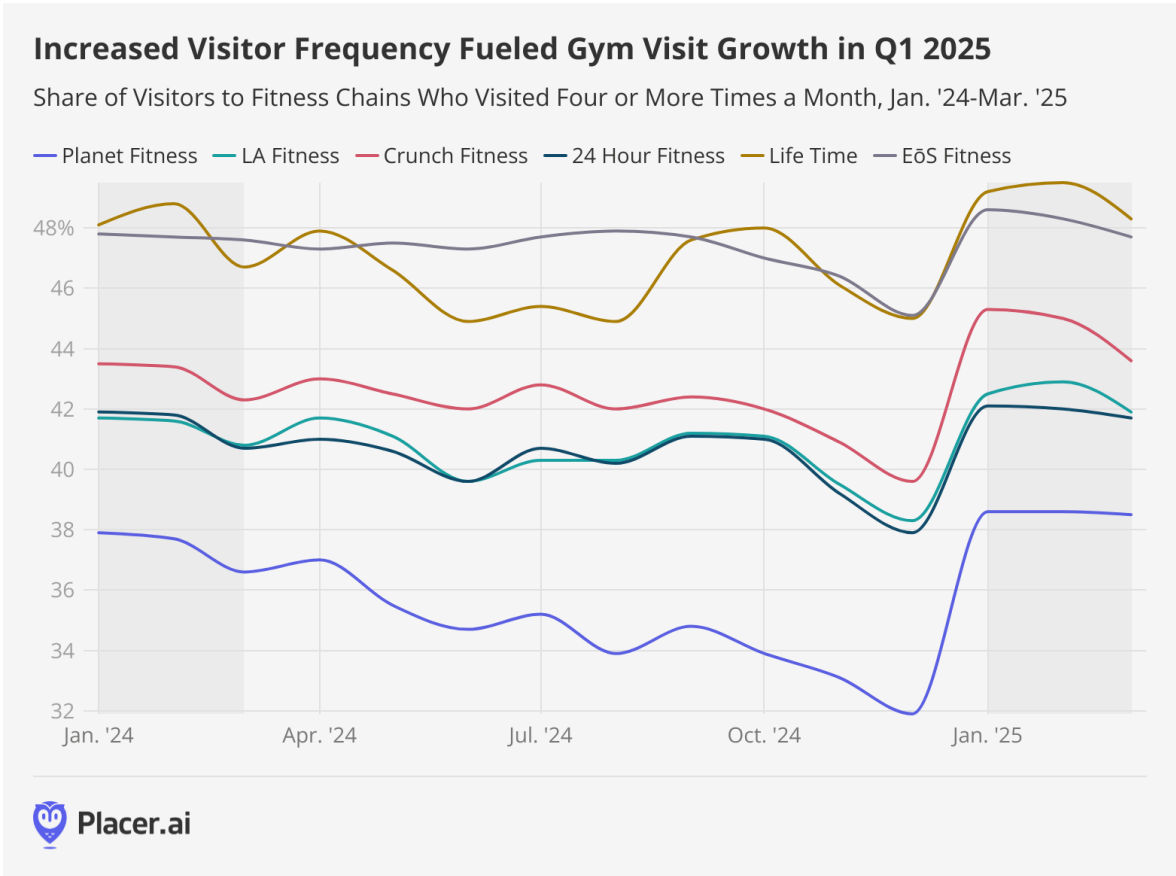
Diving into visitation patterns for leading fitness chains highlights how increased visitor frequency drove foot traffic growth in Q1 2025.

Fitness chains tend to receive the most visits during the [first months](#) of the year as consumers recommit to health and wellness in their post-holidays New Year's resolutions. And not only do more people hit the gym – analyzing the data reveals that gym-goers also typically work out more frequently during this period. Zooming in on 2025 so far suggests that consumers are especially committed to their fitness routines this year: Leading gyms saw an increase in the proportion of frequent visitors

(4+ times a month) in Q1 2025 compared to the already significant percentage of frequent visitors in the first quarter of 2024.

Elevated visitor frequency could mean that gym-goers are getting more value out of their memberships than last year, and are therefore more likely to stay signed up throughout the year.

At the same time, the data also reveals that – contrary to what may be expected – a fitness chain’s share of frequent visitors appears to be independent of the cost of membership associated with the club: Life Time, a high-end club, and EōS Fitness, a value-priced gym, had the highest shares of frequent visitors between January 2024 and March 2025. This suggests that factors other than cost, such as location convenience, class offerings, community, or individual motivation, might be more influential in driving frequent gym attendance.



Fitness Clubs at Different Price Points

Segmenting the fitness industry by membership price tiers –value-priced, mid-range, and high-end – can reveal further insights on current consumer behavior around out-of-home fitness.

Household Income Bulks Up

In Q1 2025, the [captured market](#)* median household income (HHI) was higher than the nationwide median HHI (\$79.6K/year) across all price tiers – suggesting that even value-priced fitness chains are attracting a relatively affluent audience. This could indicate that gym memberships are somewhat of a luxury and that consumers from lower-income households gave up their gym memberships altogether as they tightened their purse strings.

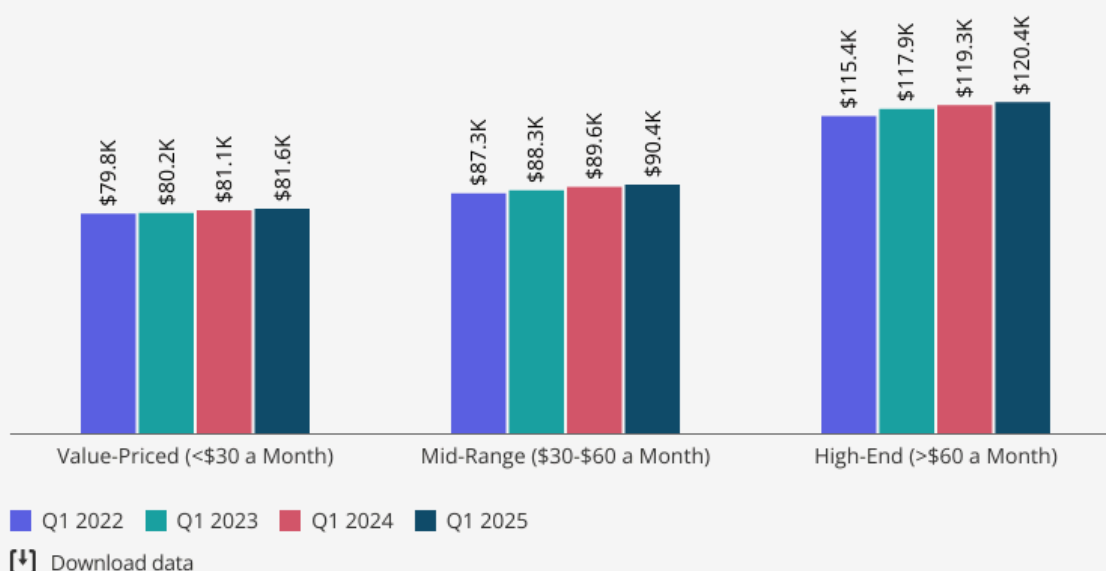
Analyzing the historical data since Q1 2022 also reveals that the captured market median HHI has risen consistently over the past couple of years with the largest median HHI increase observed in the captured trade areas of high-end fitness chains. This suggests that middle-income households – that are more sensitive to the rising cost of living – likely swapped pricier gym memberships for more affordable options in recent years.

These metrics indicate that fitness chains at all price tiers need to think strategically about the value they offer and the amenities that can engage budget-conscious consumers who are carefully weighing every expenditure.

**Captured trade area is obtained by weighting the census block groups (CBGs) from which the chain draws its visitors according to their share of visits to the chain and thus reflects the population that visits the chain in practice.*

High-End Fitness Chains Saw the Greatest Increase in Median Household Income

Median HHI Based on STI: Popstats Combined with Placer.ai Data for Captured Trade Areas

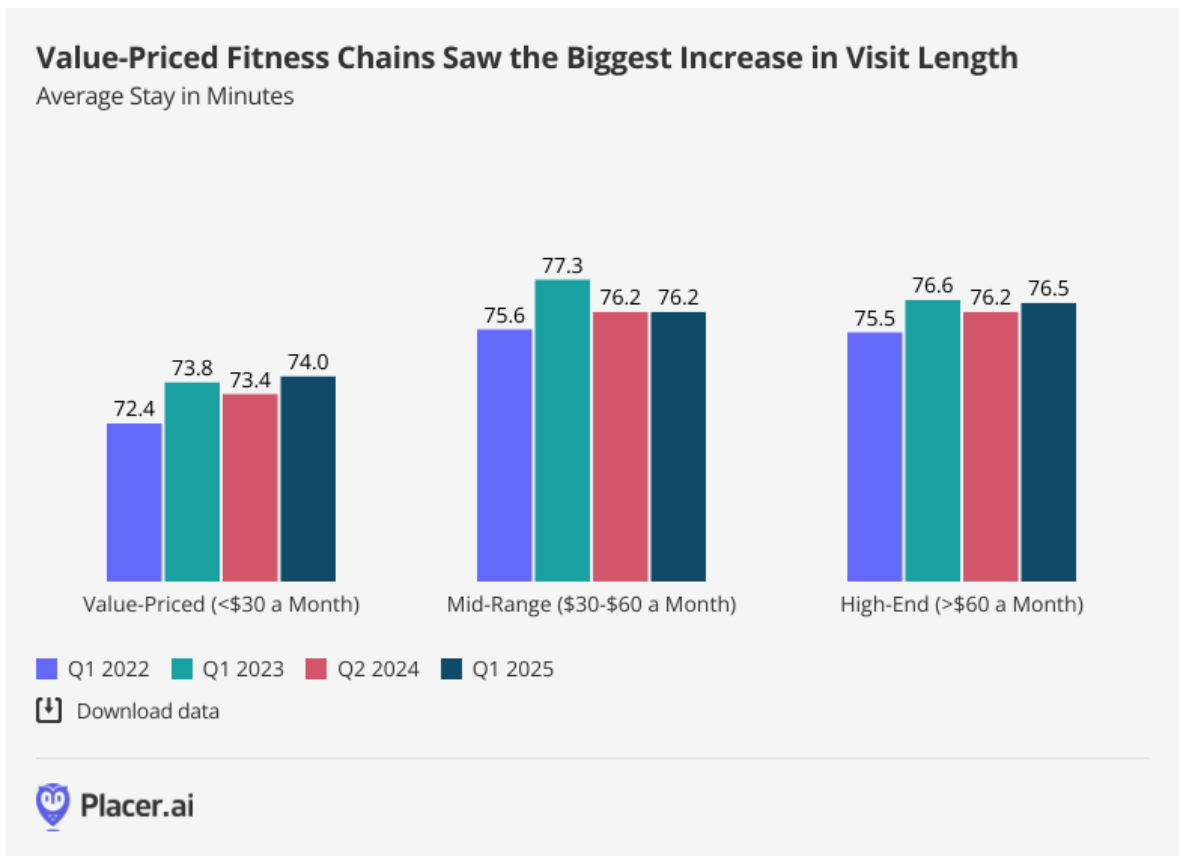


Average Stay Increases

Fitness clubs of all types need to manage their capacity to ensure health and safety standards and a positive experience for members. And understanding the average amount of time visitors spend at the gym can help fitness chains at every price point keep their finger on the pulse of their facilities.

Between Q1 2022 and Q1 2025, the average visit length increased at value-priced, mid-range, and high-end gyms. Value-priced gyms experienced the largest increase in average visit length – from 72.4 minutes in Q1 2022 to 74.0 minutes in Q1 2025 – perhaps due to their relatively lower-income visitors spending more time enjoying club amenities after cutting back on other forms of recreation. Meanwhile, mid-range and high-end gyms experienced relatively modest increases in average visit length, which were higher to begin with – likely due to their ample class and spa offerings and overall inviting, upscale spaces.

Elevated average visit length could mean that visitors are well-engaged and less likely to cancel their memberships. But as overall gym visits are on the rise, fitness chains may want to pay close attention to how long visitors spend at the facility. Floorplan and equipment [improvements](#) could be considered in order to reduce bottlenecks, and having trainers available to instruct on equipment usage and workout technique could help gym-goers streamline workouts.



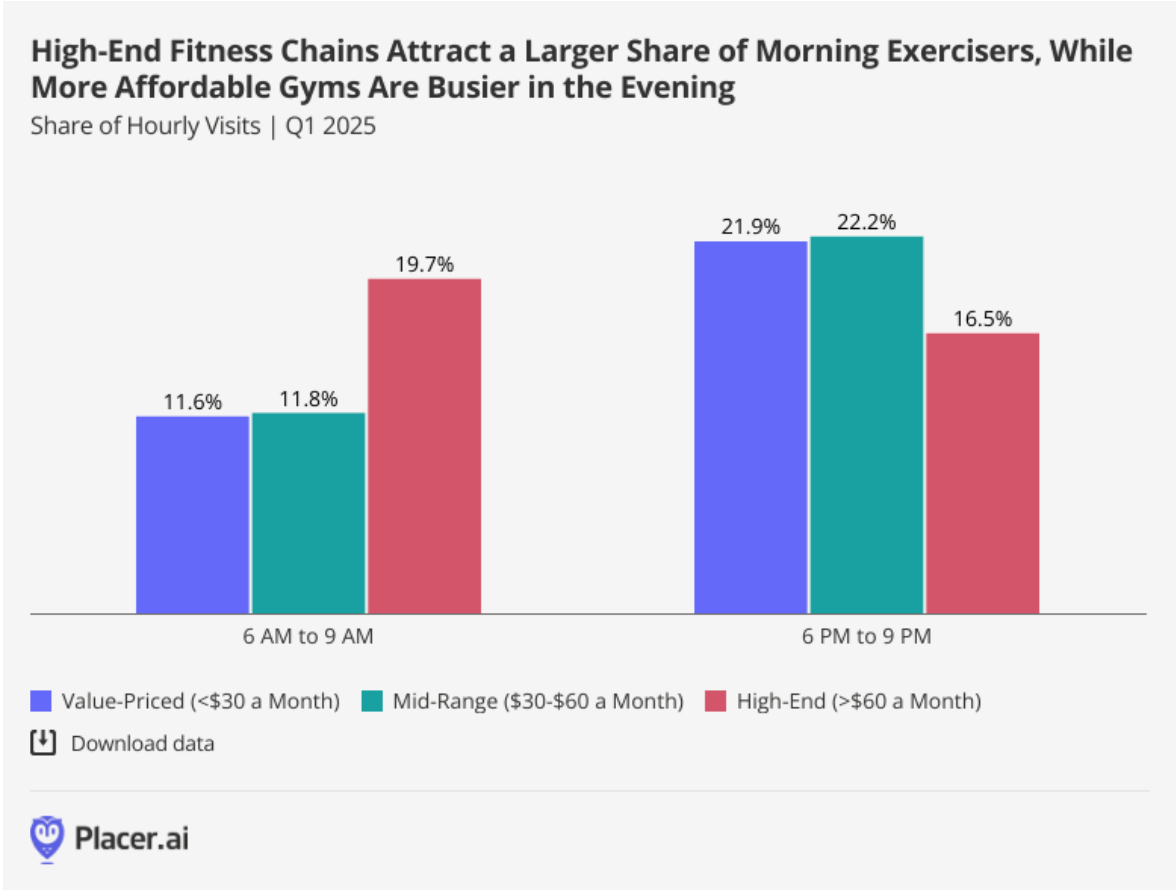
Workouts on a Schedule

Along with average visit length, understanding the daypart in which they receive the most visits is another way that fitness chains can improve efficiency and prevent overcrowding. And analysis of the hourly visits to fitness sub-segments revealed that

some fitness segments receive more morning visits while others are more popular in the evenings.

In Q1 2025, high-end chains received a larger share of visits between 6 a.m. and 9 a.m. (19.7%) than value-priced and mid-range fitness chains (11.6% and 11.8%, respectively). Meanwhile, value-priced and mid-range fitness chains received larger shares of visits between 6 p.m. and 9 p.m. (21.9% and 22.2%) than high-end chains (16.5%).

Gyms can leverage this data to better serve members, for instance by scheduling more classes during peak hours. Value-priced and mid-range gyms, which saw a larger disparity between shares of morning and evening visits in Q1 2025, might also consider incentivizing off-peak usage through discounted morning memberships or early-bird snack bar deals.



Fitness Continues to Grow

The fitness space appears to be in good shape in 2025. Visits have made a full recovery from the pandemic era and still continue to grow, indicating strong consumer demand for out-of-home workouts. And using location intelligence to analyze the behavior and demographics of visitors to gyms at different price points can help identify opportunities for driving even greater success.

Key Takeaways

- 1. Elevated visitor frequency could mean that gym-goers are getting more value out of their memberships and are therefore more likely to stay signed up.** Between January and March 2025, all of the gym chains analyzed had a higher share of frequent visitors (those who visited about once a week) than in the equivalent month of 2024.
- 2. Fitness chains at all price tiers need to be strategic about the value they offer and the amenities that can engage budget-conscious consumers.** Between Q1 2022 and Q1 2025, the captured trade area median HHI increased for all fitness subsegments – value-priced, mid-range, and high-end – suggesting that consumers swapped pricier gym memberships for more affordable options.
- 3. Close attention should be paid to how long visitors spend at fitness chains in order to reduce crowding and bottlenecks.** Between Q1 2022 and Q1 2025, the average visit length increased at value-priced, mid-range, and high-end gyms. Floorplan and equipment improvements could be considered, as well as having trainers available to help gym-goers streamline workouts.
- 4. Gyms can use hourly visit data to better serve their members or use promotions to stabilize facility usage throughout the day.** In Q1 2025, high-end chains received a larger share of morning visits while value-priced and mid-range fitness chains received larger shares of evening visits.