

Winning Strategies For a Stabilizing Fitness Market

Gym visits are stabilizing following two years of post-pandemic growth – and staying on top of changing consumer preferences can help fitness studios continue driving visits.

1. **Fitness visits are stabilizing.** After two highly successful years, the pace of gym visit growth is slowing – but that doesn't mean that the segment is stagnating. The fitness space continues to evolve, and gym operators that keep up with changing preferences can continue to see success.
2. **The evening daypart is growing in popularity – and becoming a harbinger of gym visit success.** Gyms like **EōS Fitness** and **Crunch Fitness** that are seeing significant increases in their shares of evening visits are also seeing greater YoY visit growth.
3. **Younger, single consumer segments are driving growth.** Fitness chains with trade areas boasting higher-than-average shares of Young Professionals and Non-Family Households are experiencing outsize YoY visit boosts. Gyms can consider these shifts and target these consumer groups – or offer relevant programming for other kinds of gym-goers.
4. **Niche fitness is seeing success.** **STRIDE Fitness**, a treadmill-based interval training gym, is driving visit growth by attracting consumers passionate about endurance sports and long-distance running. And the country's most exciting new sport – pickleball – is fueling visits at **EōS Fitness** in Phoenix.



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This report excludes locations within Washington state due to local legislation.

Fitness Segment Back In Shape

The **Fitness industry** was a major post-pandemic winner. Visits to gyms across the country surged as stay-at-home orders ended and people returned to their in-person workout routines. And even as consumers reduced discretionary spending in the face of inflation, they kept going to the gym – finding room in their budgets for the chance to embrace wellness and get in shape while interacting with other people.

But no category can sustain such unabated growth forever – and as the segment inevitably stabilizes, gyms will need to stay nimble on their feet to maintain their competitive edge.

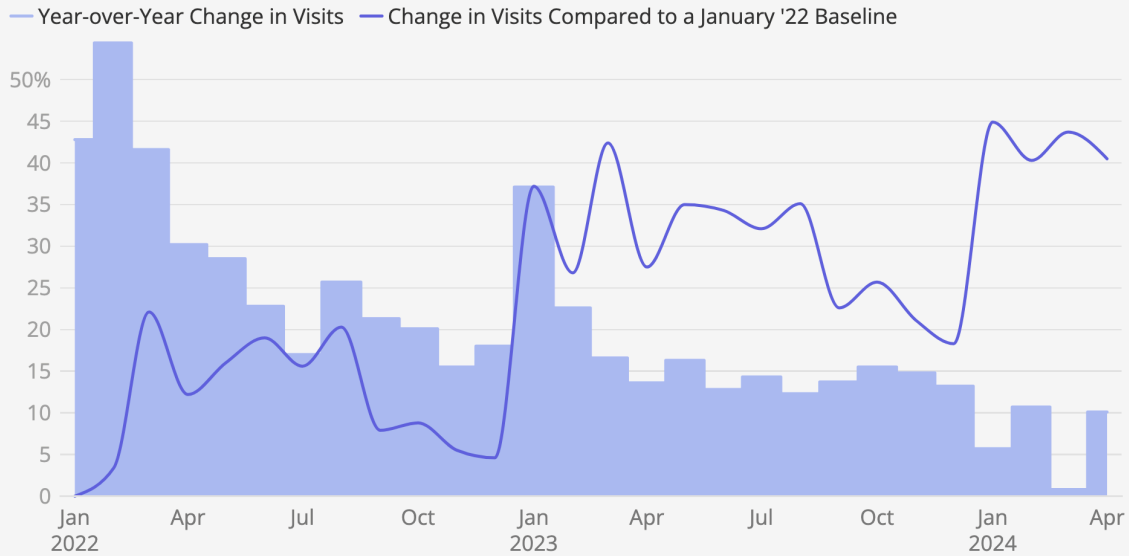
This white paper takes a closer look at the state of Fitness as the category transitions into a more stable growth phase following two years of outsize post-pandemic demand. The report digs into the location analytics to reveal how the Fitness space has changed – and what strategies gyms can adopt to stay ahead of the pack.

Stability Is The Name Of The Game

Monthly visits to the Fitness category have grown consistently year over year (YoY) since early 2022, when COVID subsided and gyms returned to full capacity. And the segment is still doing remarkably well. Even in January and March 2024 – when visits were curtailed by an [Arctic blast](#) and by the [Easter holiday](#) weekend – YoY Fitness visits remained positive, despite the comparison to an already strong 2023.

Still, recent months have seen smaller YoY increases than last year, indicating that the Fitness category is entering a more normalized growth phase.

The Fitness Industry is Seeing Stabilizing Growth Following Post-COVID Surge



Change in Monthly Visits to Fitness Chains Nationwide | 2022 - 2024 YTD



Leaning Into Evolving Consumer Preferences

By keeping a close watch on evolving consumer preferences, fitness chains can uncover new opportunities for growth and adaptation within a stabilizing market – including leaning into increasingly popular dayparts.

Late Afternoon And Evening Visits On The Rise

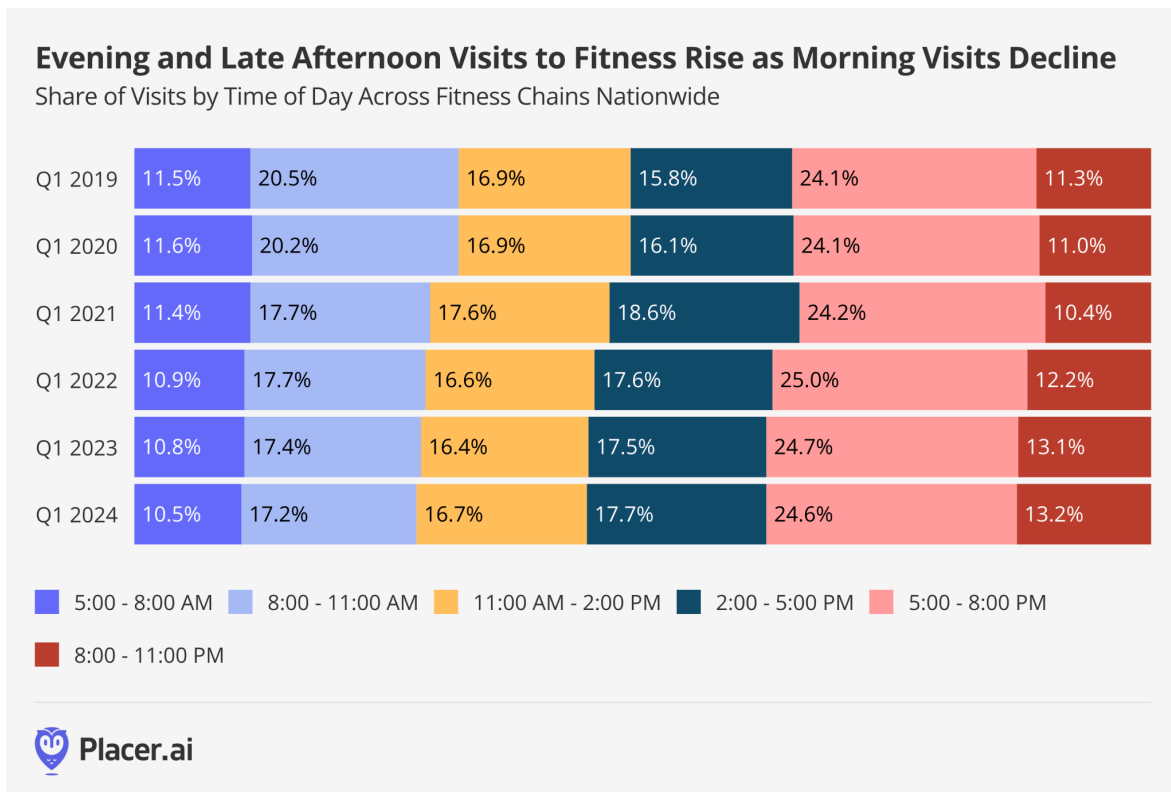
Examining the evolving distribution of gym visits by daypart over the past six years shows that major shifts were brought on by the COVID-19 pandemic.

Between Q1 2019 and Q1 2021, as remote work took hold, gyms saw their share of 2:00 PM - 5:00 PM visits increase from 15.8% to 18.6%. Though this trend partially reversed as the pandemic receded, afternoon visits remained elevated in Q1 2024

compared to pre-COVID – likely a reflection of hybrid work patterns that leave people free to take an exercise break during their workdays.

At the same time, the share of morning visits to fitness chains (between 8:00 AM and 11:00 AM) dropped from 20.5% in Q1 2019 to 17.2% in Q1 2024, while evening visits (between 8:00 PM and 11:00 PM) increased from 11.3% to 13.2%.

Gyms that recognize this changing behavior can adapt to new workout preferences – whether by incentivizing morning visits, scheduling popular classes mid-afternoon, or offering extended evening hours.

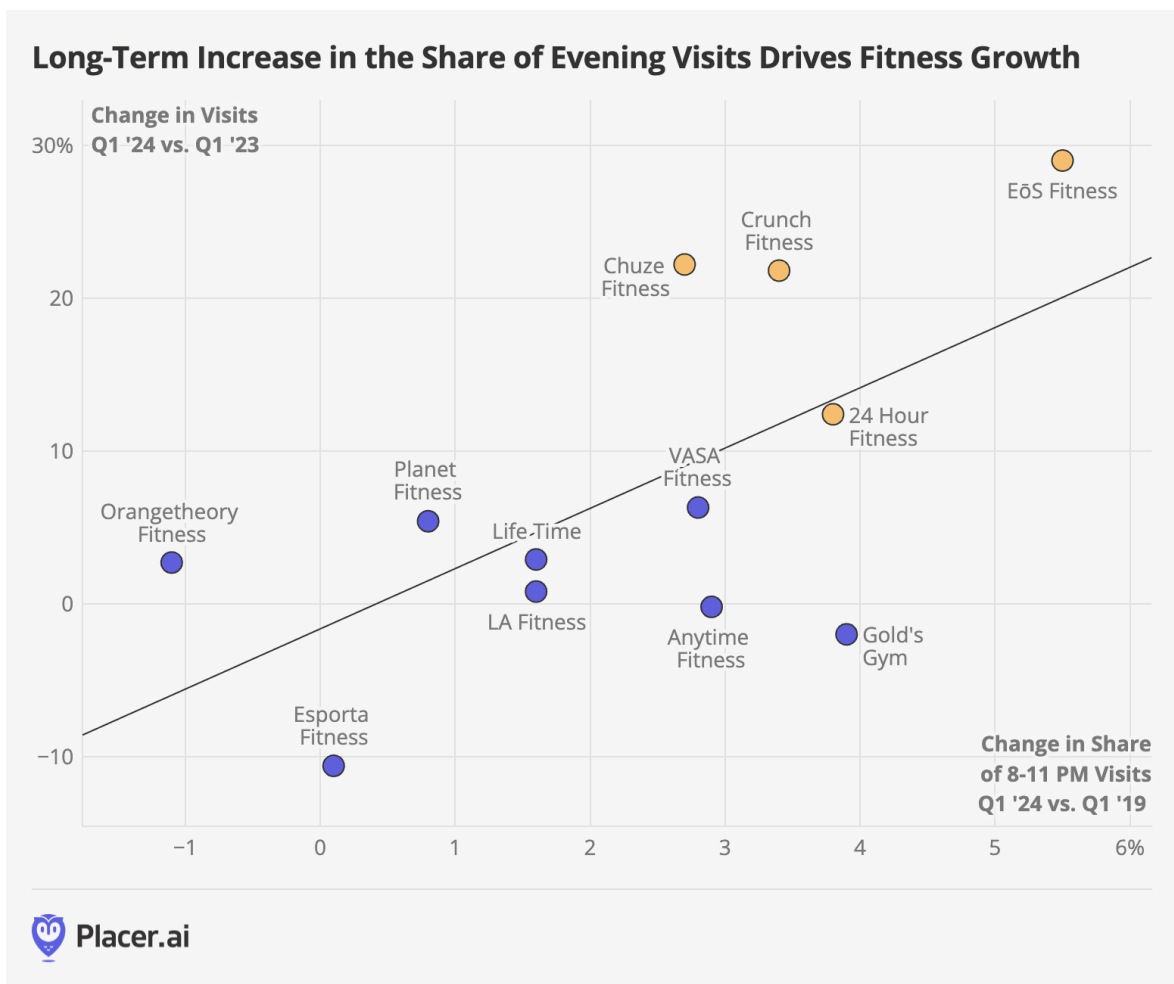


Evening Workouts Provide Gains

In fact, the data indicates that gyms that are leaning into the evening workout trend are already finding success: Of the top 12 most-visited gym chains in the country, those that saw bigger increases in their shares of evening visits also tended to see greater YoY visit growth.

EōS Fitness and **Crunch Fitness**, for example, have seen their shares of evening visits grow by 5.5% and 3.4%, respectively, since COVID – and in Q1 2024, their YoY visits grew by 29.0% and 21.8%, respectively. Other chains, including **24 Hour Fitness** and **Chuze Fitness**, experienced similar shifts in visit patterns. At the same time, **LA Fitness** saw just a minor increase in its share of evening visits between Q1 2019 and Q1 2024, and a correspondingly small increase in YoY visits.

As the evening workout slot gains popularity, gym operators that can adapt to these new trends and encourage evening visits may see significant benefits in the years to come.



Young Gym-Goers Driving Success

Diving into demographic data for the analyzed gym chains sheds light on some factors that may be driving this heightened preference for evening workouts at top-performing gyms.

The four fitness chains that experienced the greatest YoY visit boosts in Q1 – **Crunch Fitness, EōS Fitness, 24 Hour Fitness, and Chuze Fitness** – all featured [trade areas](#) with significantly higher-than-average shares of Young Professionals and Non-Family Households. ([STI: PopStat's](#) Non-Family Household segment includes households with more than one person not defined as family members. [Spatial.ai: PersonaLive's](#) Young Professional consumer segment includes young professionals starting their careers in white collar or technical jobs.)

In plainer terms, these consumer segments – typically young, well-educated, and without children – and therefore more likely to be flexible in their workout times – are driving visits to some of the best-performing gyms across the country. And these audiences seem to be displaying a preference for nighttime sweat sessions – a factor that gyms can take into account when planning programming and marketing efforts.

Leading Fitness Chains Attract a Higher Share of Young Professionals and Visitors from Non-Family Households

Share of Non-Family Households and 'Young Professionals' Compared to the Nationwide Benchmark | Q1 '24

	Non Family Households	Young Professionals
Crunch Fitness	+22%	+73%
EōS Fitness	+19%	+70%
24 Hour Fitness	+13%	+34%
Chuze Fitness	+13%	+35%

Based on *STI: Popstats and **Spatial.ai: Personalive Data Combined with Placer.ai Captured Trade Area Data and compared to the nationwide benchmark. Spatial.ai's 'Young Professionals' segment denotes "well-educated young professionals starting their careers in white-collar or technical jobs".



Attracting Niche Markets

Leaning into emerging gym visitation patterns is one way for fitness chains to thrive in 2024 – but it isn't the only marker of success for the segment. Even after years of visit growth, the market remains open to new opportunities and innovations that meet health-conscious consumers where they are.

Striding Towards Success

STRIDE Fitness, a gym that offers treadmill-based interval training, has sparked a trend among running enthusiasts. This niche player is finding success, particularly among a specific demographic: runners and endurance training enthusiasts.

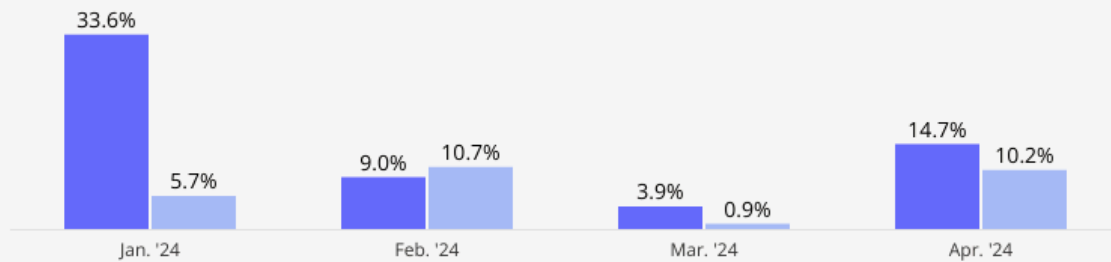
Between January and April 2024, monthly YoY visits to STRIDE Fitness consistently outperformed the wider Fitness space. A standout month was January, when Stride Fitness's visits soared by an impressive 33.6% YoY, surpassing the industry average of 5.7% for the same period.



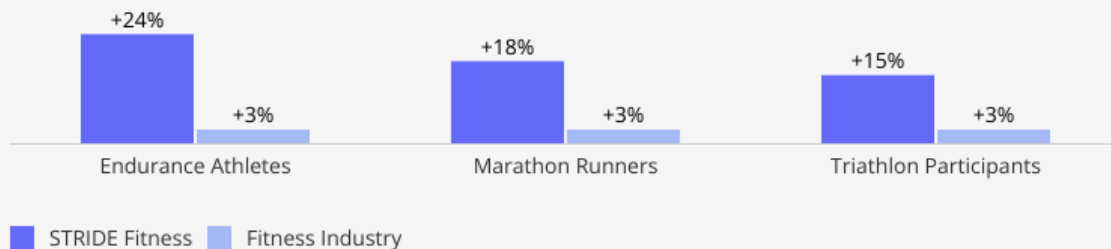
Psychographic data from the [Spatial.ai's FollowGraph](#) dataset – which looks at the social media activity of a given audience – suggests that STRIDE Fitness' trade areas are well-positioned to attract those visitors most open to its offerings. Residents of Stride Fitness's [potential market](#) are 24% more likely to be, or to be interested in, Endurance Athletes than the nationwide average – compared to just 3% for the Fitness industry as a whole. Similar patterns emerge for Marathon Runners and Triathlon Participants. This indicates that the chain is well-situated near consumers with a passion for endurance sports and long distance running, helping it maintain a competitive edge in the crowded gym market.

STRIDE Fitness' Treadmill Concept Draws Running Enthusiasts, Surpassing the Fitness Industry

2024 Year-Over-Year Change in Monthly Visits



Jan. to Apr. '24 Demographics Compared to Nationwide Average Based on Spatial.ai: FollowGraph Combined With Placer.ai Data for Potential Trade Areas



Pickleball Craze Sends Visits Soaring

Pickleball, a game that blends elements of tennis, ping pong, and badminton, is the [fastest-growing](#) sport in the country. And recognizing its broad appeal, some fitness chains have begun incorporating pickleball courts into their facilities.

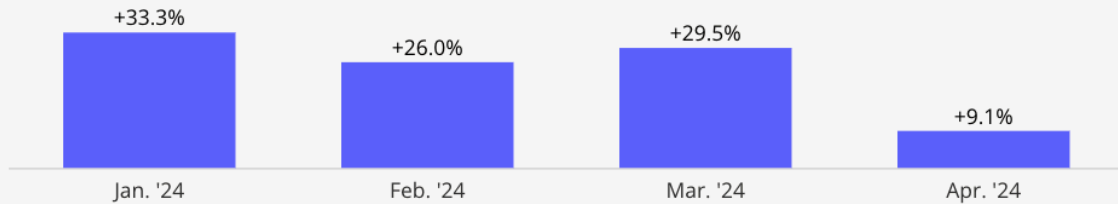
Arizona-based **EōS Fitness** added a pickleball court at a Phoenix, AZ location – and early 2024 data highlights the impact of this addition. Between January and April 2024, the location drew between 9.1% and 33.3% more monthly visits than the chain's Arizona visit-per-location average.

And analyzing the demographic profile of the chain's location with a pickleball court reinforces the game's increasingly [wide appeal](#). Young consumer segments have been [embracing](#) the game in large numbers – and the Phoenix **EōS Fitness** location's potential market includes a significantly higher share of 18 to 34-year-olds than the chain's overall Arizona potential market. Residents of the pickleball location's trade area are also less affluent than the chain's Arizona average.

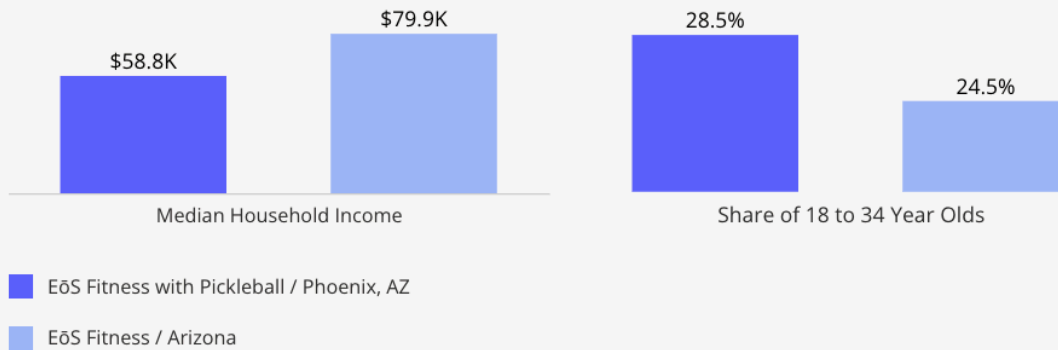
Pickleball has typically been associated with more affluent consumer segments, and it seems like this may be shifting. With more people than ever embracing the game, gyms that choose to add courts to their facilities may reap the foot traffic benefits.

EōS Fitness' Only Location with Pickleball (Encanto Blvd, Phoenix, AZ) is Outperforming the Chain's Nearby Venues, Attracting Younger Visitors

Monthly Visits to the Pickleball Location Compared to the Average Visit-Per-Location at EōS Fitness in Arizona



Demographics Based on STI: Popstats Combined with Placer.ai Data for Potential Trade Areas | January to April 2024



Something For Everyone

The Fitness industry has undergone a significant transformation since COVID-19. The category's outsize post-pandemic visit growth has begun to stabilize, and gyms are staying ahead by adapting to changing consumer preferences. Evenings are emerging as crucial dayparts for gym operators, likely driven by younger consumer segments. And niche fitness chains are seeing visit success, proving that there are plenty of ways for the Fitness segment to succeed.

