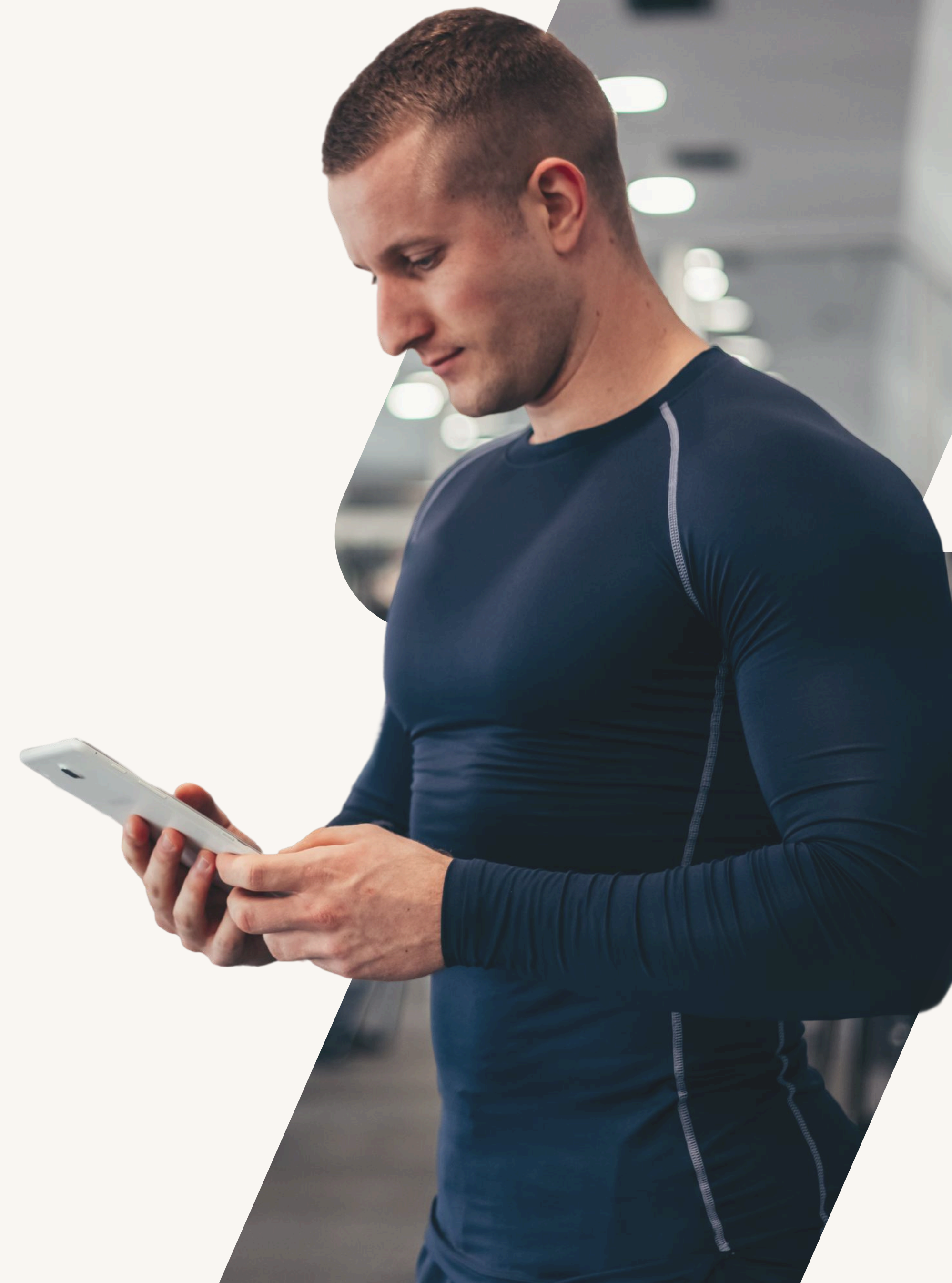


WELLNESS WATCH MID-YEAR 2026 THE REINFORCEMENT SHIFT

Why consistency is becoming the new currency of fitness
ABC Fitness proprietary platform data and consumer research



A note from ABC Fitness' CEO



Fitness consumers are no longer looking only for access, novelty or inspiration. They are looking for systems that help them keep going.

In the first half of 2026, ABC Fitness data shows a market defined by reinforcement: [accountability](#), [consistency](#), [community](#), [technology](#) and clearer value across gyms and studios.

The next phase of fitness growth will be built on helping members return, stay engaged and see progress.



Bill Davis

CEO | ABC Fitness

ABC FITNESS BY THE NUMBERS

40M+

Members

30K+

Businesses

80K+

Coaches

\$14B+

Payments

01

THE BEHAVIORS SHAPING FITNESS IN 2026

New join patterns, spending trends and emerging member behaviors reveal what drives retention, loyalty and long-term growth.

First half of 2026 by the numbers

In gyms, new joins are down, check-ins are flat and cancellations are up. Less people are choosing to join or stay with gyms, but those staying are consistent.



New joins

-9%

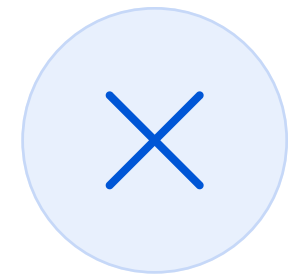
YoY



Check-ins

+1%

YoY

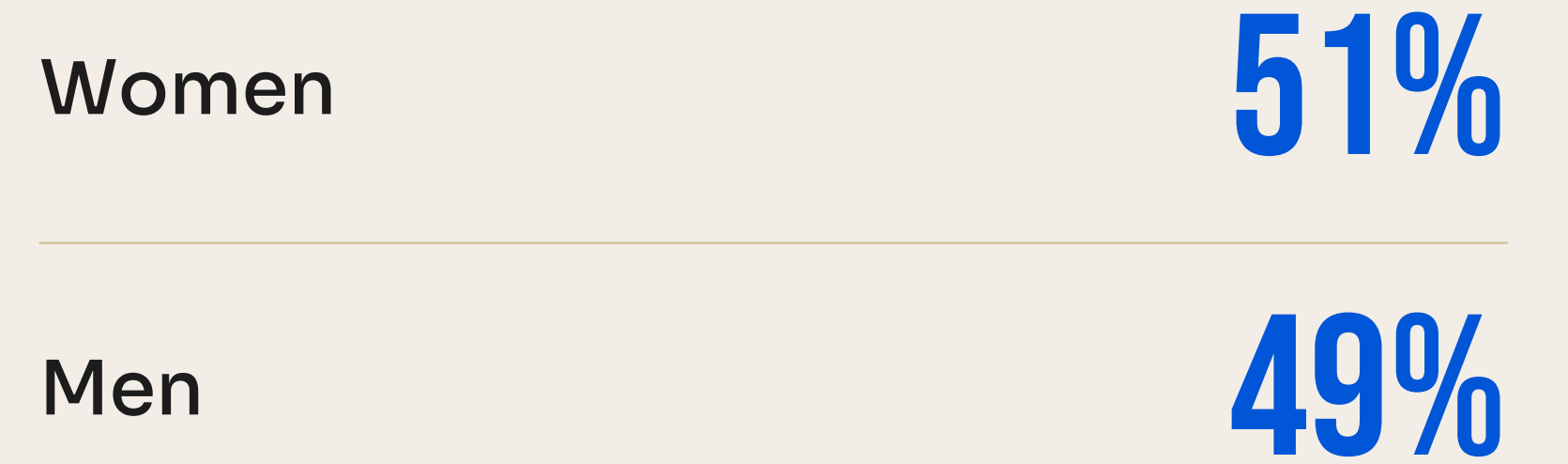


Cancellations

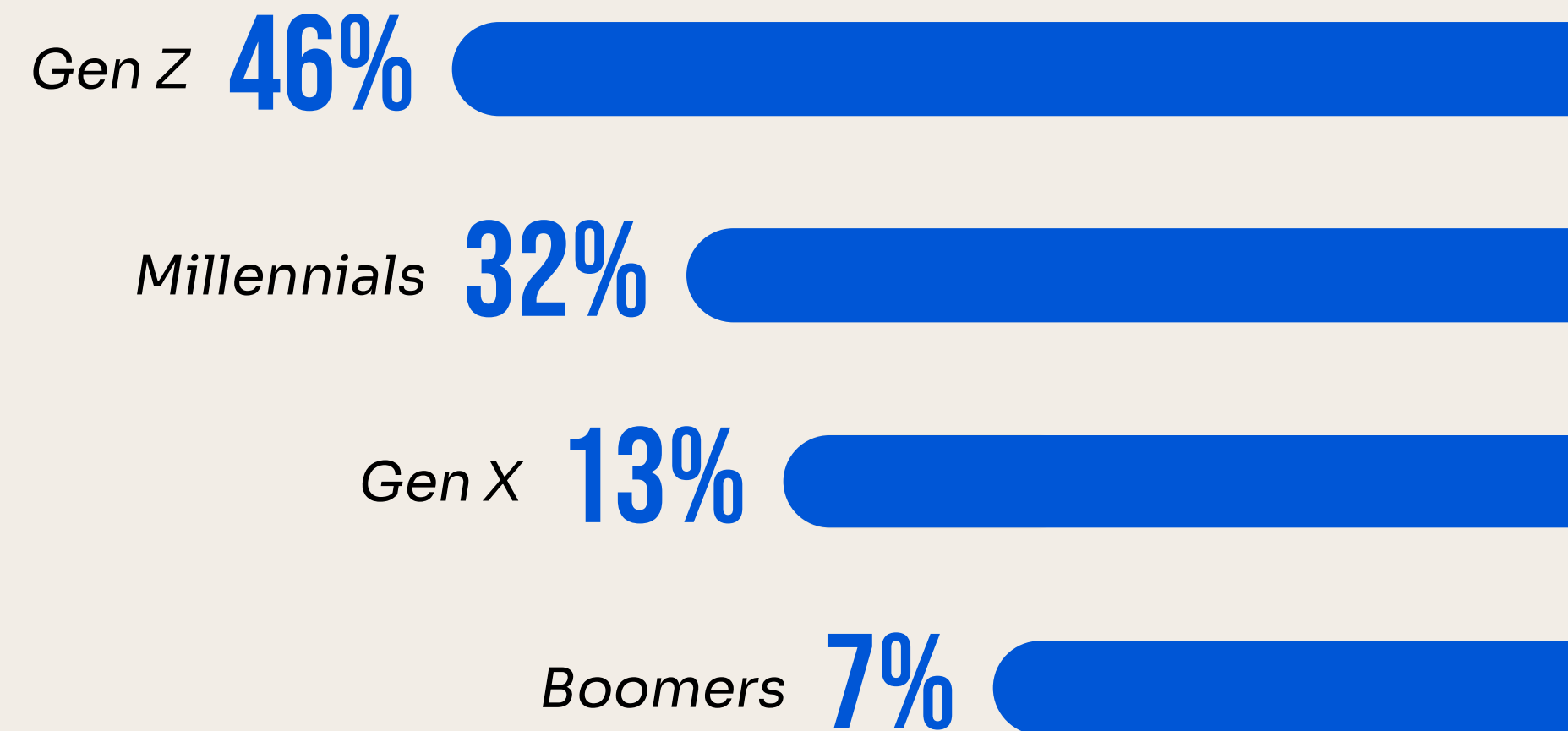
+8%

YoY

NEW JOINS BY GENDER




NEW JOINS BY GENERATION



First half of 2026 by the numbers


New joins are down in studios, but check-ins are up significantly + 27% across modalities, with 35-44 year olds leading the way.

74%
YoY growth in new joins
for 35-44 cohort




New joins

-5%
YoY



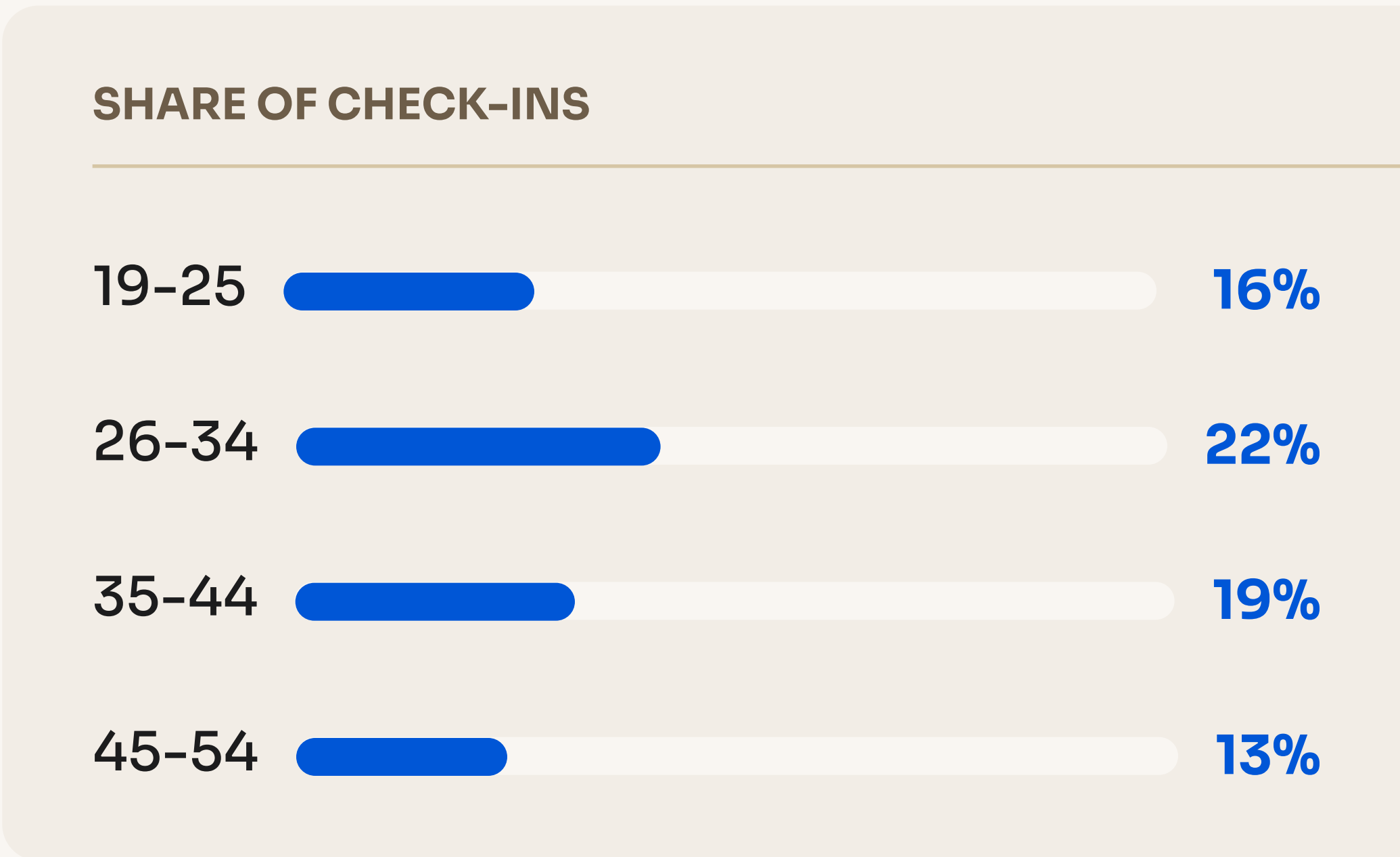
Check-ins

+27%
YoY



Cancellations

-6%
YoY

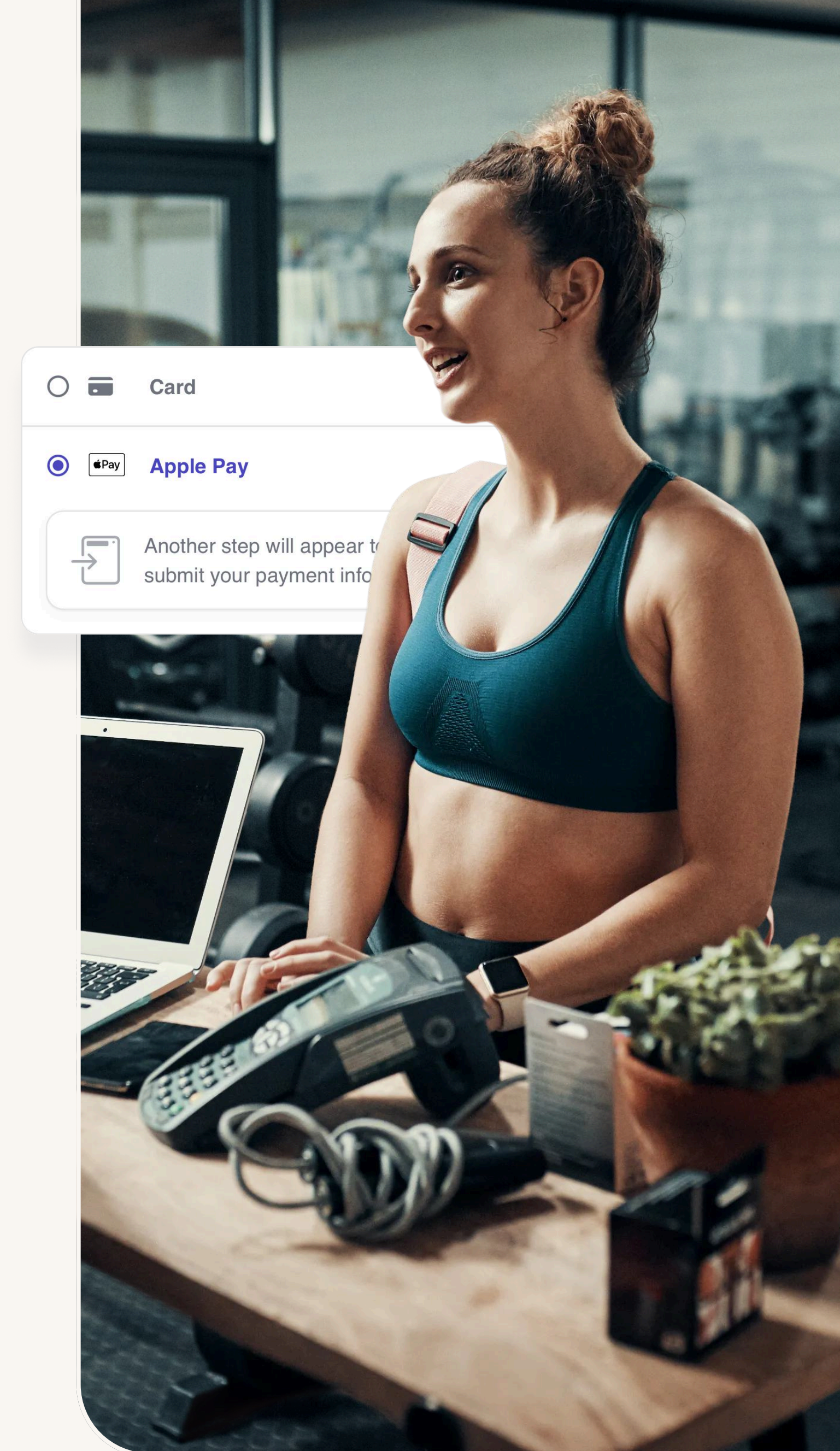


CONSUMER SPEND

How much are members spending?

SPEND METRIC	VALUE
Enterprise gyms	\$17 average monthly spend
Small and boutique gyms	\$27 average monthly spend
Studios	\$69 average monthly spend

Average monthly spend +3% YoY in gyms | +9.7% YoY in studios



THE BEHAVIORS DRIVING FITNESS GROWTH

*Community, accountability and technology are
reshaping member expectations.*

SPOTLIGHT

Community is the new currency

COMMUNITY BENEFITS



67%

2026 | +12% YoY

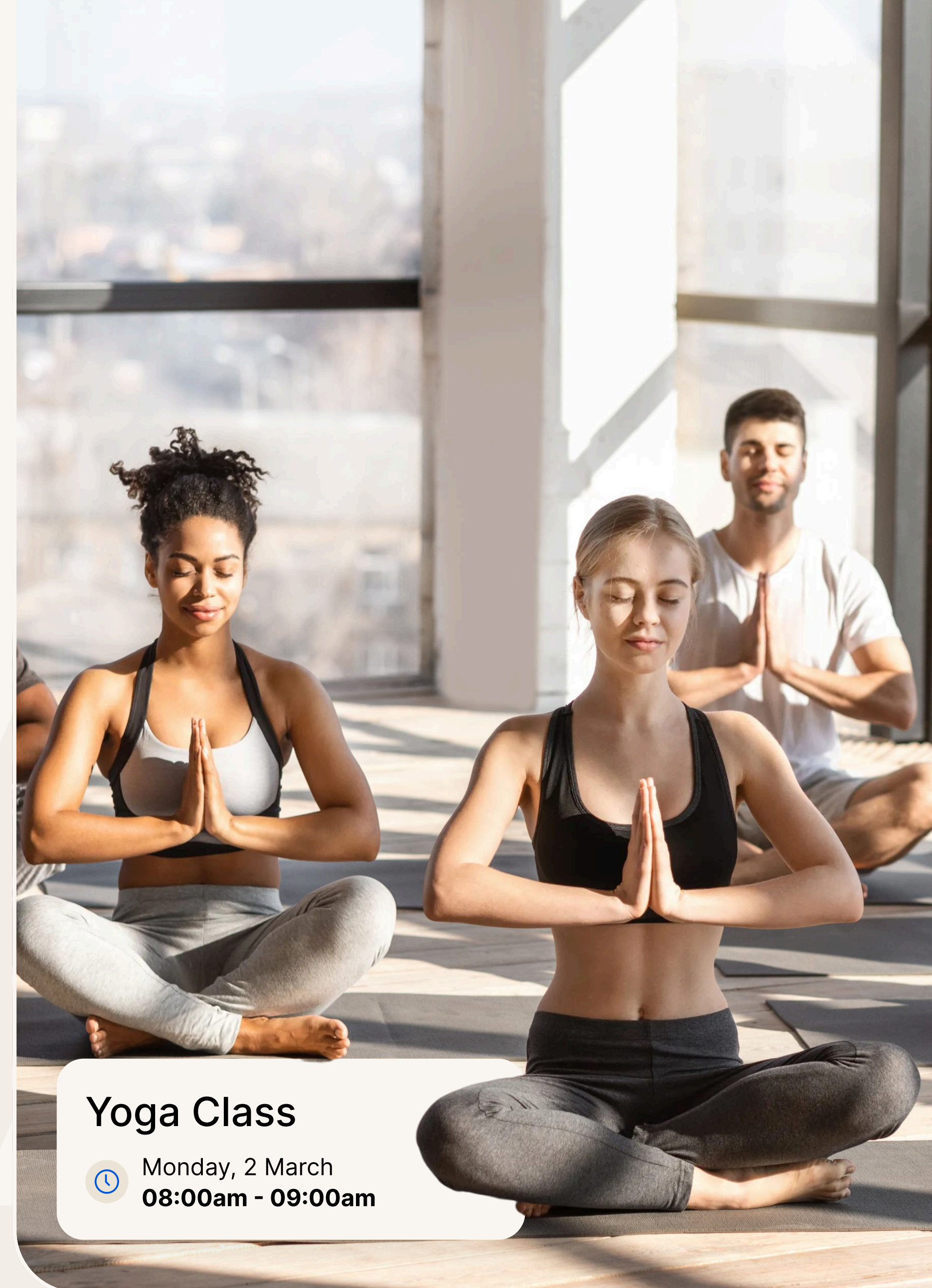
of members agree that community is the biggest driver of motivation and accountability in their fitness routine.



61%

2026 | +12% YoY

of members say community leads to improved mental and emotional well-being.



Yoga Class

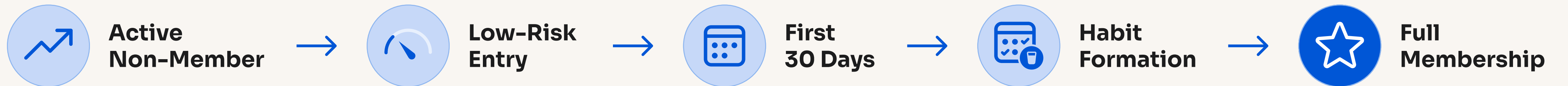
Monday, 2 March
08:00am - 09:00am

CALLOUT

Active, not enrolled

The next growth opportunity is the consumer who is already active, but not committed to a membership or regular spend at a gym or studio. "Active non-members" are not disengaged. They are lower-spend, convenience-driven and anchored in outdoor and at-home routines.

BEHAVIOR	ACTIVE NON-MEMBERS	ACTIVE CONSUMERS OVERALL
Spend less than \$25/month on fitness	77%	22%
Prefer fitness options within one mile	63%	15%
Use health club/gym	1%	40%



Consistency drives long-term loyalty



The next phase of fitness growth will be built on consistency. Operators who make it easier for members to return, stay accountable and see progress will be best positioned to earn long-term loyalty.



Bill Davis

CEO | ABC Fitness

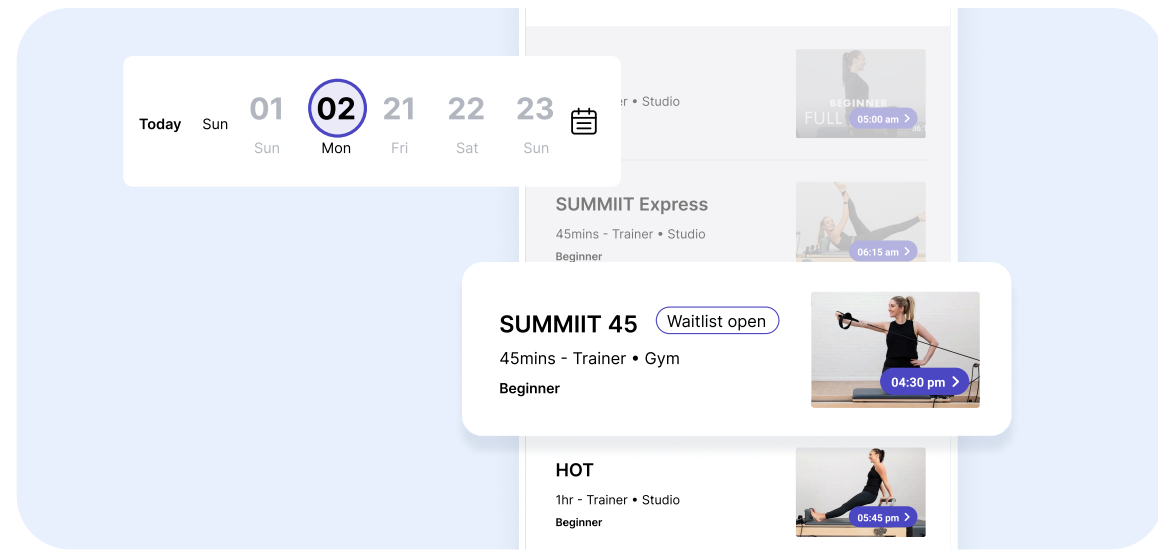


57%

*of active consumers agree that a **fitness community significantly impacts long-term commitment** to an active lifestyle.*



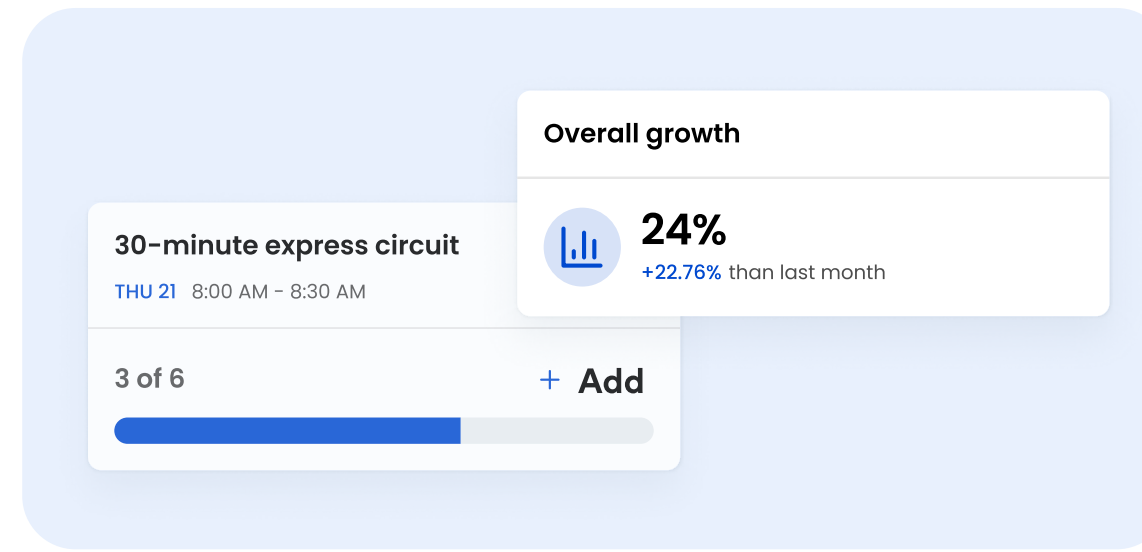
What this means for operators



01

Reinforce repeat behavior

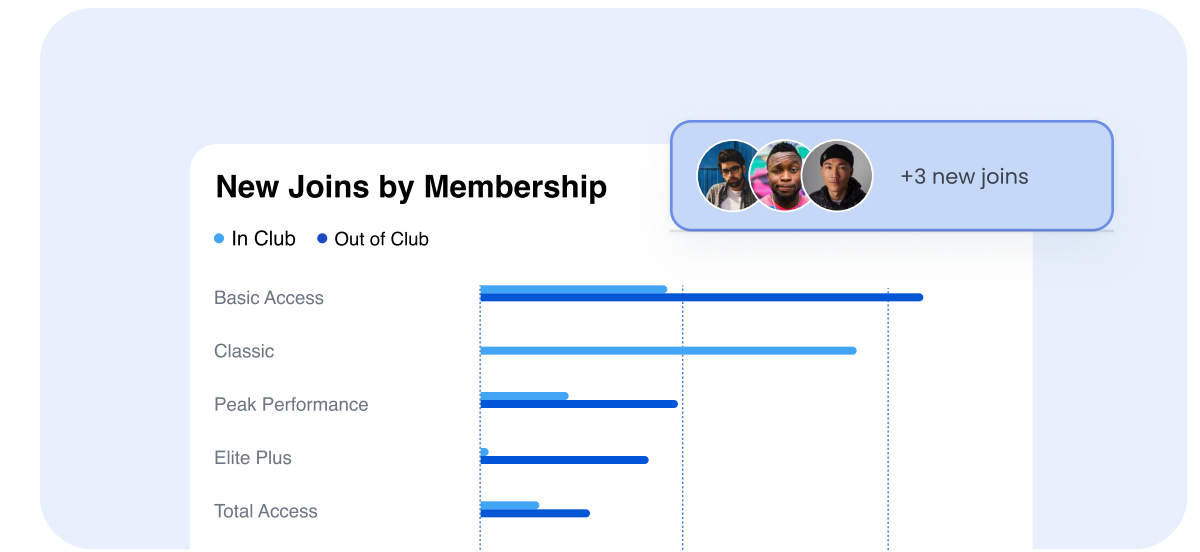
Build systems that make consistency easier.



02

Make value visible

Show members progress, accountability and return on spend.



03

Define your role

In a portfolio fitness market, every operator needs a clear reason to stay.

RESEARCH APPROACH

Methodology

The next phase of fitness growth will be built on consistency. Operators who make it easier for members to return, stay accountable and see progress will be best positioned to earn long-term loyalty.

ABC Fitness data is derived from a sample of approximately 13,000 fitness businesses serving 35.5 million members across nearly 90 countries and reflects activity from January 1, 2026 through May 31, 2026. The analysis excludes ABC Fitness' Latin America (ABC Evo) and Trainerize segments. To ensure year-over-year comparability and eliminate growth-related distortions, all comparative metrics are based on same-store cohorts and do not include net-new customers added during the measurement period. Check-ins are defined as member facility access events, day pass purchases, or attendance at a studio class. New joins represent new memberships or net-new individuals added to a club's member database, while cancellations refer to terminated memberships. As the world's largest technology provider dedicated exclusively to the fitness industry, ABC Fitness supports more than 30,000 fitness businesses and 80,000 coaches globally, providing a unique dataset focused solely on fitness operator and member activity.

Consumer insights included in this report are based on a year-over-year comparison of Active Consumer survey data collected in 2025 and 2026. To ensure consistency, only survey questions and response options that appeared in both years were included in the analysis, with the 2026 survey structure serving as the analytical baseline. Results were analyzed using normalized percentage distributions and evaluated at the response level to identify meaningful shifts in consumer attitudes, motivations, and behaviors. Visualizations were created using standardized chart templates to facilitate direct comparison between years, while accompanying narratives were developed to interpret broader trends rather than simply report numerical differences. All reasonable efforts were made by ClubIntel to ensure data comparability; however, survey findings are representative only of the individuals who participated in the research and are not necessarily based on third-party audited data.

The statistical validity of individual findings may vary based on sample size and response consistency. Neither ClubIntel nor ABC Fitness makes representations or warranties regarding the results of the study and assumes no liability for inaccuracies, omissions, or consequential damages arising from its use.





ABCFITNESS.COM

**COMMUNITY, CONSISTENCY, AND FLEXIBLE
PARTICIPATION CONTINUE TO SHAPE
FITNESS BEHAVIOR IN 2026.**

Thank you for reviewing this report.