

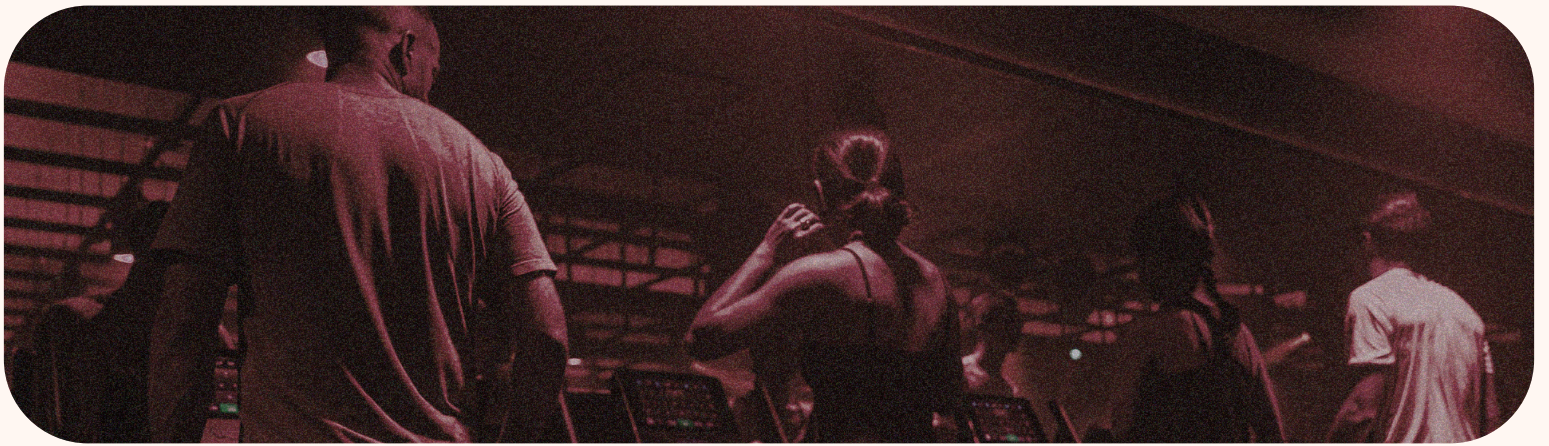
2024

# Mariana Tek

## *Boutique Fitness Trends Report*



 xplor  
mariana tek



# About this report.

Mariana Tek's 2024 boutique fitness trends report examines what's new in the boutique fitness market, analyzes client trends, and shares tips to set your studio up for success.

To put this report together, we analyzed data from *Mariana Tek users* and *surveyed studio owners on the Mariana Tek platform*.

At the start of this report, you'll find all the juicy data, including:

- The most popular modalities in the boutique fitness space
- Class data including price, size, and start times
- Client data including age, attendance, and booking trends

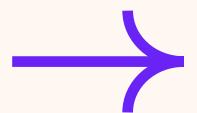
In the second part of the report, we examine *insights from the market* and our owner survey, including:

- The top studio owner concerns
- The many growth paths owners can follow
- Why franchising continues to be a popular choice

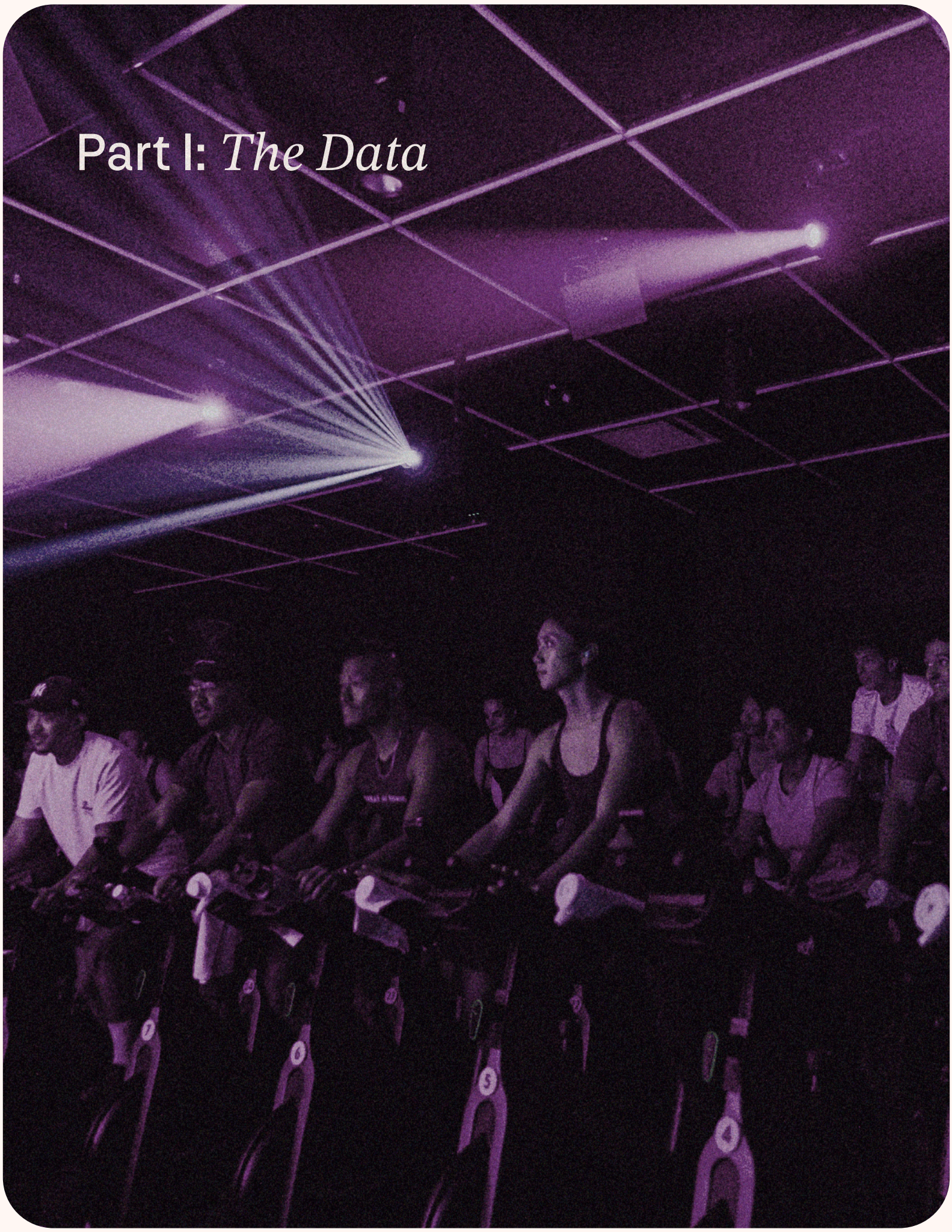
And finally, we'll leave you with the *key takeaways* - we detail *three key success factors* for boutique studio owners to flourish in 2025 and beyond.

# Contents

- Part 1: The Data
- Part 2: The Insights
- Part 3: The Key Takeaways



# Part I: *The Data*



# Top Boutique Studio *Modalities* in 2024

Mariana Tek data from the first half of 2024 shows that Pilates, Spin, Yoga and Barre all have a strong market presence by studio quantity. Last year, we saw Pilates was the most popular modality of new studios that opened in 2023.

1	Pilates	21.88%
	→ Lagree / Megaformer	8.26%
2	Spin/Multi-Modality	14.91%
3	Yoga	14.08%
4	Barre	13.58%
5	HIIT	9.26%
6	Group Fitness	7.64%
7	Strength Training	4.32%
8	Boxing	1.87%
9	Bootcamp	1.45%
	<i>Other</i>	<i>11.01%</i>

In our August eBook, we saw Pilates was the most popular modality among new studios that opened in 2023.

If you're considering opening a new studio - [read the full report](#)

## New Studio Data

Here are some trends in location and modality of the new studios that first opened their doors in 2023.

### New Boutique Fitness Studios by *Modality*

27.3%

*Pilates*

21.9%

*Indoor Cycling*

13.1%

*Group Fitness*

10%

*Other*

9.2%

*Yoga*

9.2%

*Megaformer*

6.2%

*Spa/Wellness*

1.9%

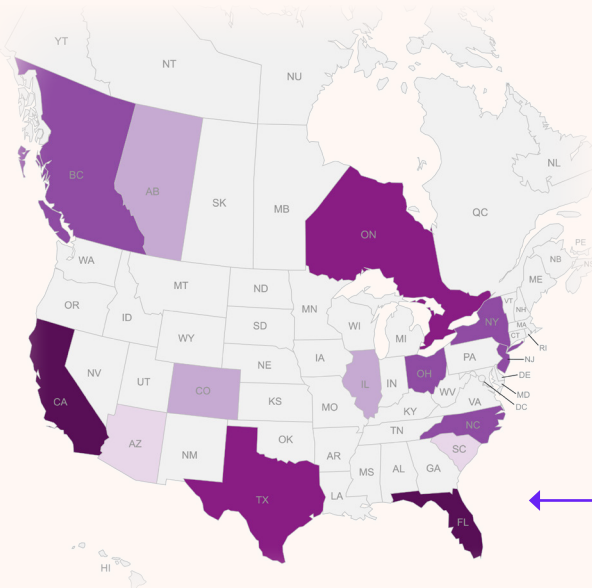
*Sports Training*

1.2%

*Bootcamp*

Pilates studios are the most popular boutique fitness modality opened in 2023. Spin, Group Fitness and Yoga were also popular.

### Regional Markets Experiencing Growth



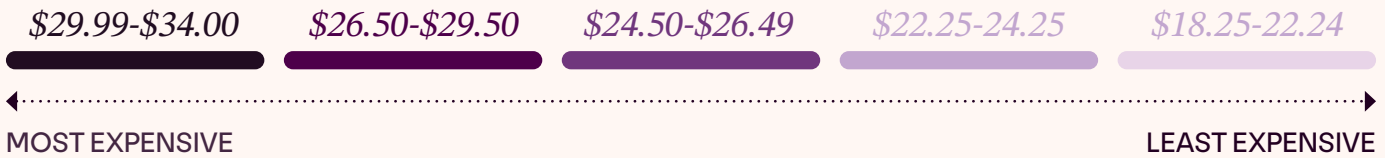
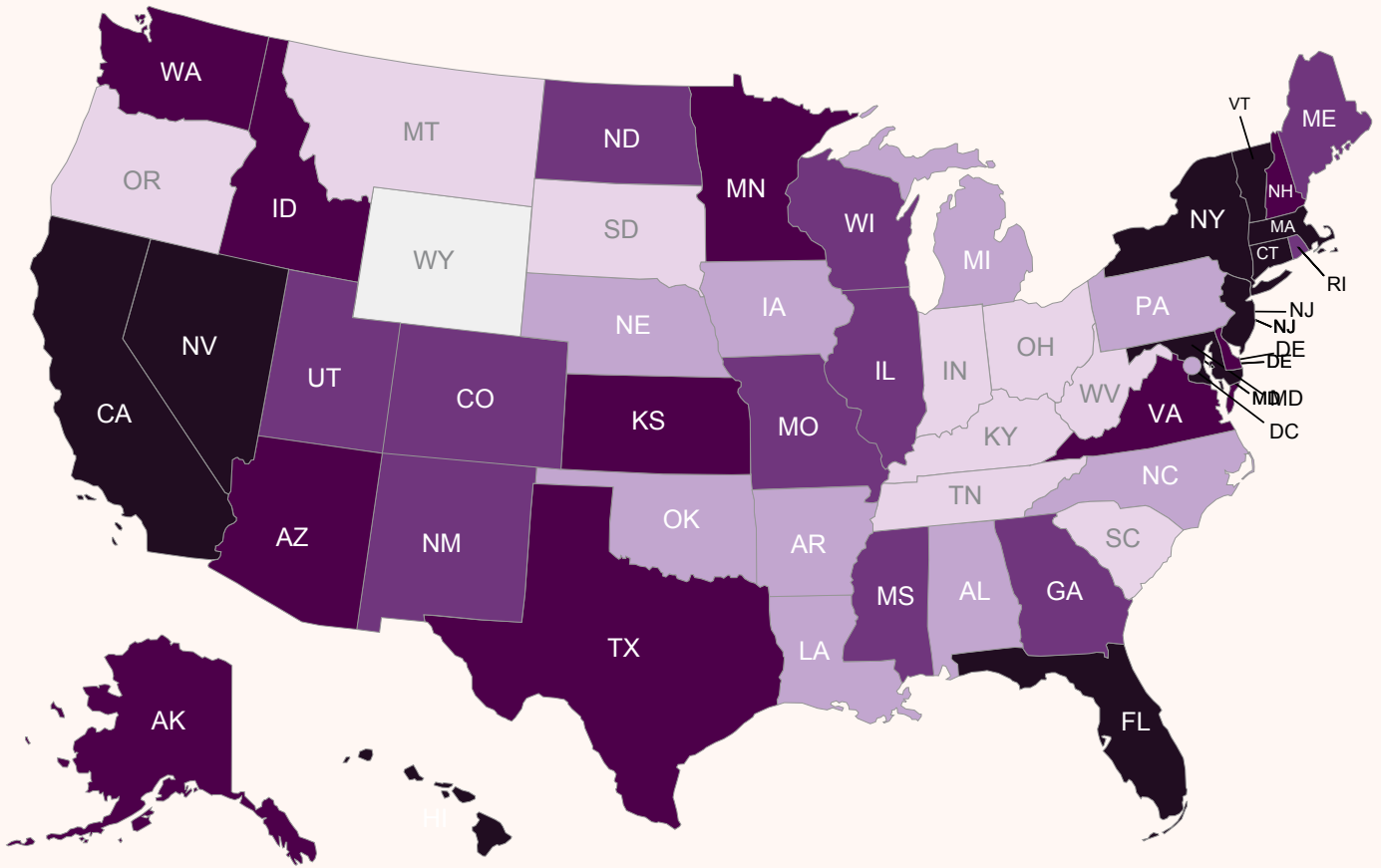
While new studios are opening all over the globe, there are a handful of regions in which Mariana Tek has seen boutique fitness grow rapidly.

According to Mariana Tek data, here are the top 15 states and provinces in North America with the largest count of boutique fitness studios.

← *The darker the color, the more studios.*

PART I: THE DATA

# Median Cost Per Class *by State*



**\$34**

*Most Expensive*

Looking at the median cost per class across all of the boutique fitness studios using Mariana Tek, we saw the *most expensive classes* are in New York and Hawaii.

**\$18**

*Least Expensive*

The *least expensive classes* are in South Dakota, Tennessee, and Kentucky.

## Class Data

**4.5**

*Average monthly class attendance per customer*

**\$27**

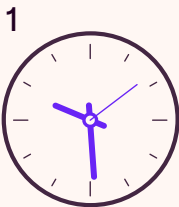
*Average cost of a class*

**29**

*Most popular client age*

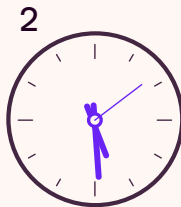
Most boutique fitness classes are attended by **people aged 27-31.**

## Top 5 Class Times (*highest attendance*)



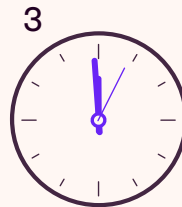
**9:30 AM**

*post-drop-off parents and flex WFH'ers*



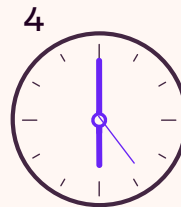
**5:30 PM**

*happy hour crew*



**12:00 PM**

*noon lunch-break heroes*



**6:00 AM**

*early birds*



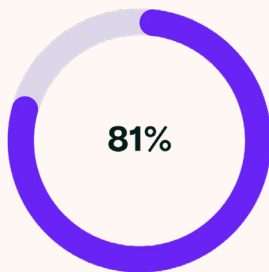
**8:30 AM**

*breakfast club*

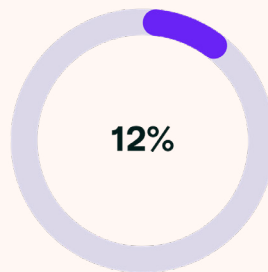
## How Are Clients Booking Classes?

Most clients are self-booking their classes.

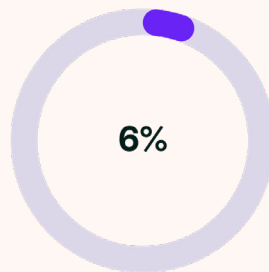
They like the ability to book online from their own devices.



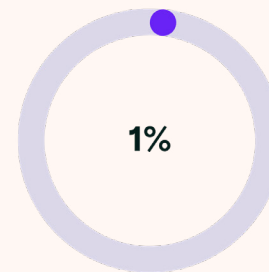
*Self-booking*



*Third-party (e.g. Classpass)*



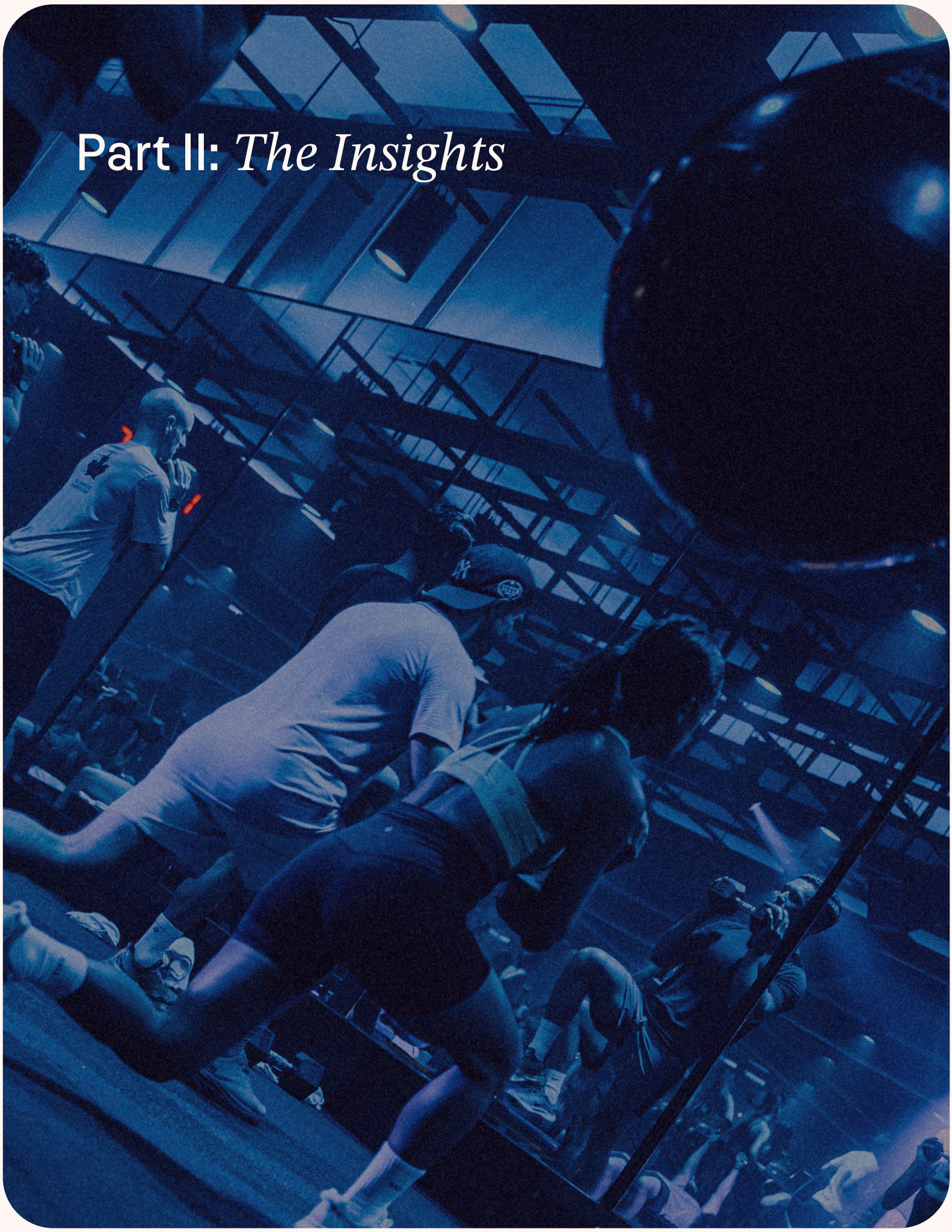
*Walk-Ins*



*Guests*



## Part II: *The Insights*





## What keeps boutique fitness owners up at night?

In one of our most important survey questions, we asked studio owners to share their biggest challenges in today's market.

**Here's what they shared as their top concerns:**

- Acquiring New Clients
- Marketing and Brand Awareness
- Maintaining Profitability

Most of our survey respondents own just one studio, and these are the challenges of a solopreneur looking to build a strong business from the ground up! We share insights to address these concerns in this report, including: how to strike the right balance between acquisition and client retention, how to personalize your services, and how to embrace the growth of wellness and GLP-1s.

## How do you define “Growth?”

*Growth* in the boutique fitness market can mean a few different things, depending on who you speak to. It could be increasing memberships, adding class offerings, new studio locations, or of course, sales. Looking at the average revenue per location from January through June of 2024, **the overall average of all studios on Mariana Tek was \$206k**. We broke our customer base in thirds to get a better look at averages by cohort:

**\$62K** Avg revenue per location

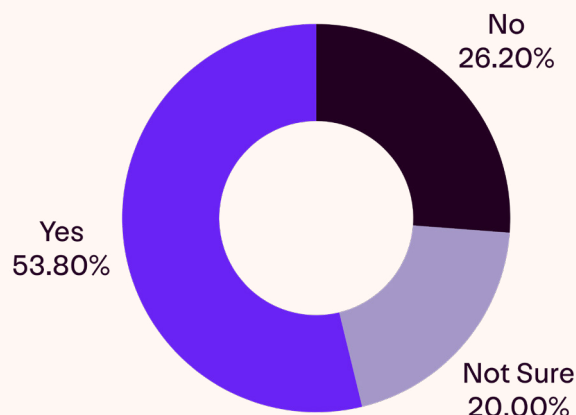
**\$165K** Avg revenue per location

**\$400K** Avg revenue per location

over a six-month period

Many owners are actively looking to grow by opening new studios, while others are happy owning and managing one studio. Another significant percentage of owners would consider the financial gain of being acquired, and potentially departing the industry altogether.

Are you looking to expand in the next 12 months?



Roughly half of the studio owners we surveyed *want to expand to another location* in the next 12 months.

What are your thoughts on being acquired?

I'm not interested



I'd entertain acquisition conversations

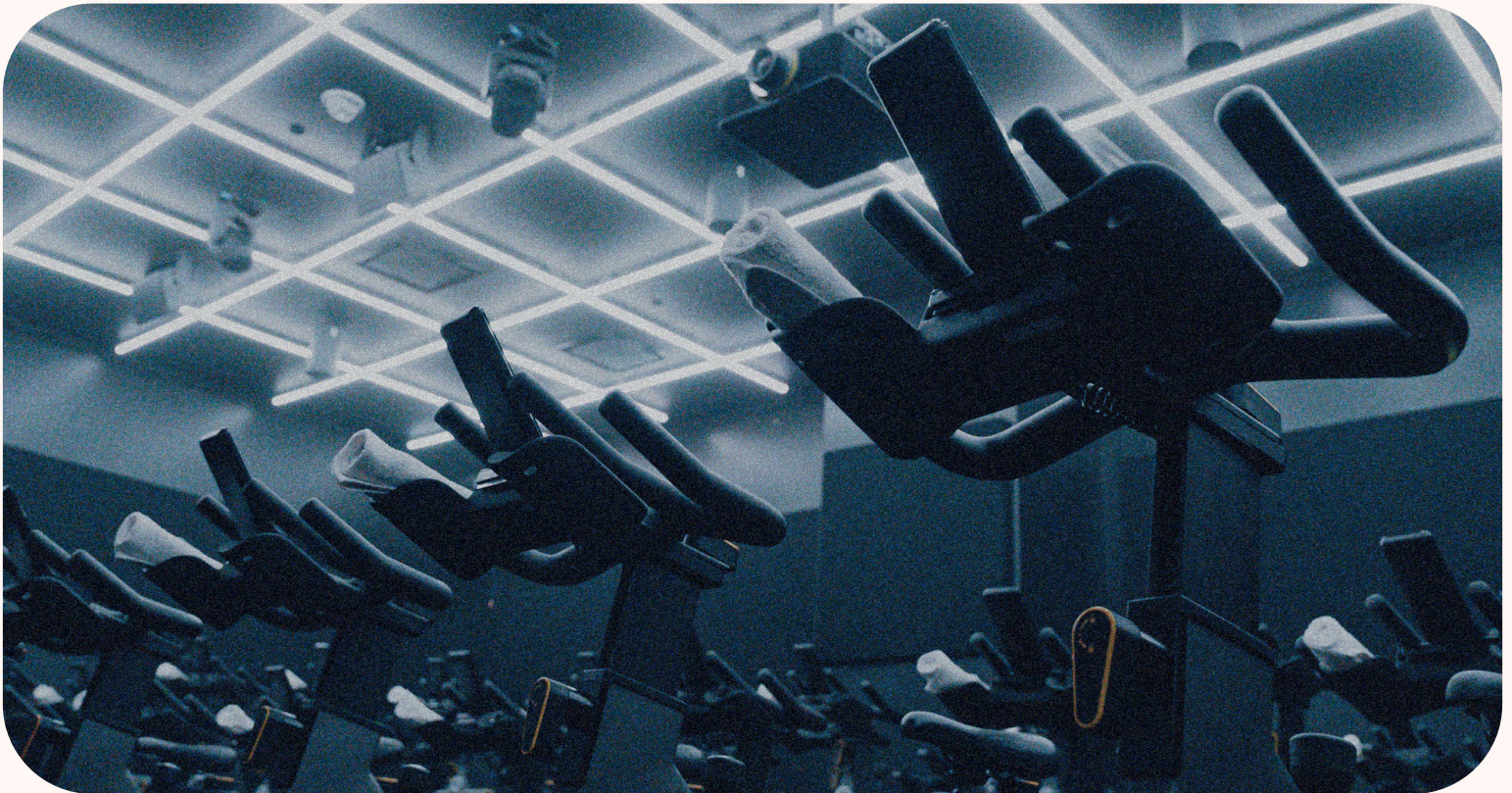


I'm interested in acquiring a studio



Roughly half of studio owners *would entertain an offer of acquisition* but only 6% would be interested in acquiring a new studio themselves.

## PART II: THE INSIGHTS



When comparing single studio locations to locations with 2-5 studios, the average active members per location increased by 27%. So as an individual owner, there's a halo effect to opening an additional location. The more studios you have, the bigger your brand presence becomes, and you'll start to see organic growth.

**21+** *locations* → **69%** *more average active members per location*

The cohort with the biggest presence - 21+ locations - had 69% more average active members per location over those with one studio. Most of these studios follow a franchise business model, with formal marketing and sales processes to follow that drive membership over package sales.

## Growth Spotlight: *Franchising is on The Rise*

25% franchise

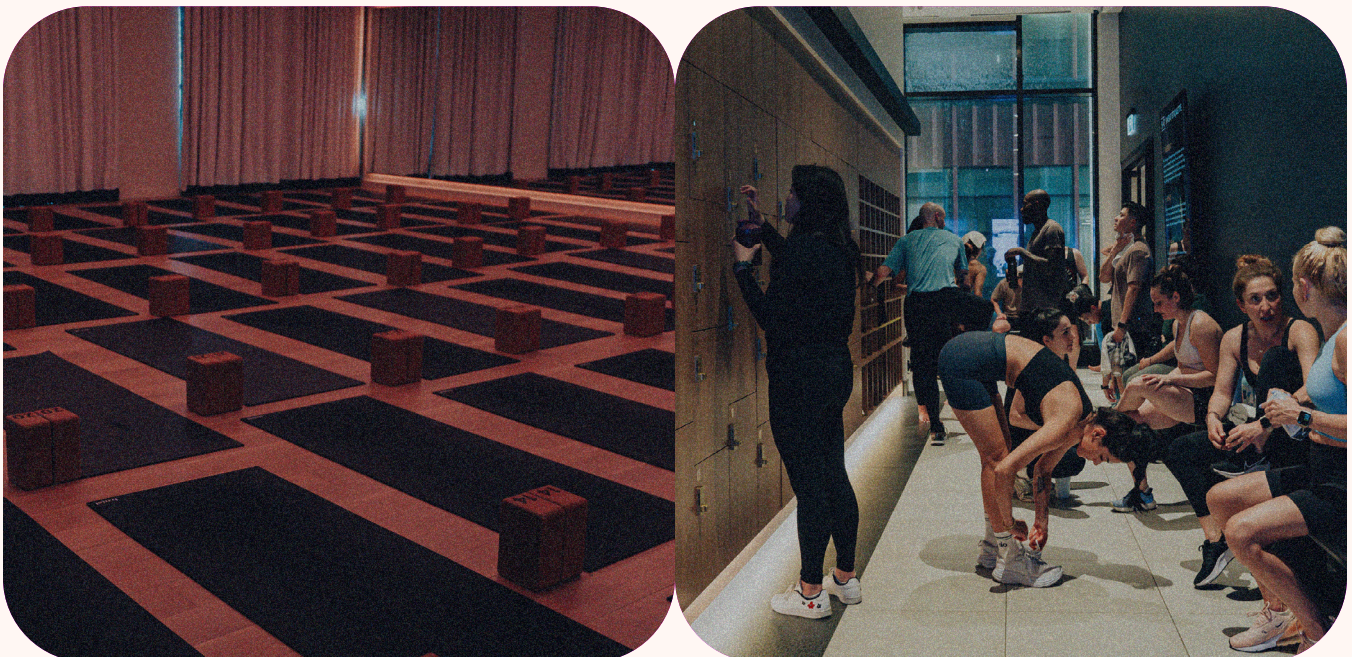
75% non-franchise

*25% of studios on Mariana Tek are franchise models*

Franchising is a popular business model in the boutique fitness world. Despite today's uncertain economy, franchising is on the rise. According to the International Franchise Organization, franchising exceeded growth expectations in 2023 and is expected to continue that momentum by adding 15,000 units and 200,000 jobs in the US in 2024.

Boutique fitness studios like barre3, Sweat440, and Pvolve have expanded rapidly through a franchise model. Mariana Tek data shows that a quarter of the boutique fitness studios operate under a franchise model.

Growth by franchising remains a strong business model for the boutique fitness industry, and we see that continuing in the future.



## Franchise Spotlight: *Q&A with barre3*

barre3 was founded when Sadie Lincoln, Co-Founder and CEO, set out to redefine success in fitness. She wanted to create a fitness model that was more mindful about being present in the body as it is, versus conforming to what everybody else looks like.



### **What made barre3 adopt a franchise business model?**

After the initial success of the barre3 Portland studios, franchising became a clear next step for barre3 to continue the mission of redefining success in fitness on a larger platform—now, globally.

### **What are the benefits of joining a franchise?**

Practical support from experts and brand awareness provides franchisees a platform to expedite their studio's growth and success. Though each franchisee independently owns and operates their studio, they benefit from a larger brand presence and a strong network of fellow owners.



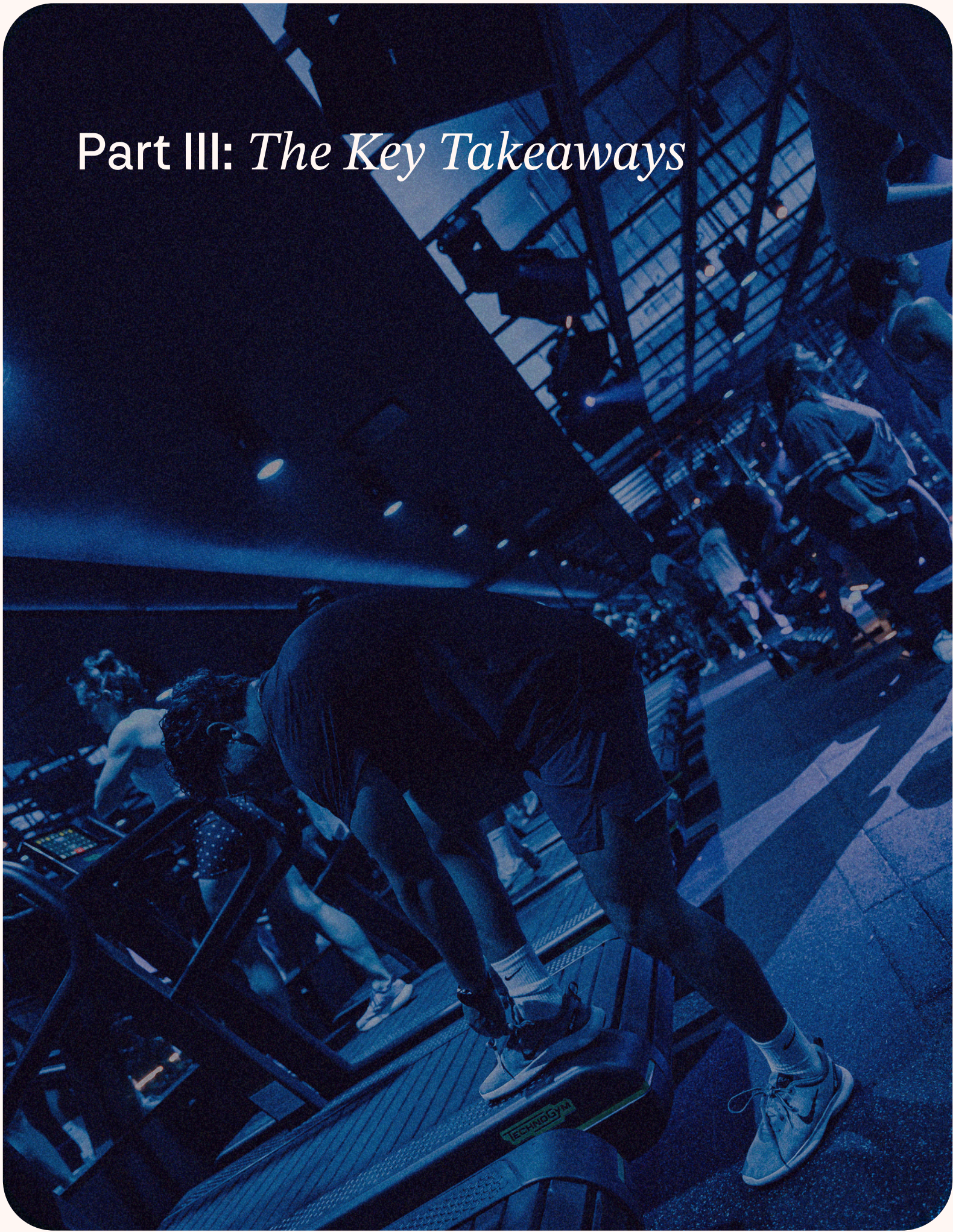
“From an owner’s perspective, I really feel supported. The barre3 team gave us a space to feel heard, listened to our needs, and followed up with action. That has made it such a beautiful partnership.”

**STACIE THOMAS**  
BARRE3 STUDIO OWNER

### **What are the benefits of franchising, to the franchisor?**

barre3 is owner-operated, so every person has skin in the game and they’re aligned with our vision, mission and purpose.

# Part III: *The Key Takeaways*





## *Key Success Factors* for Boutique Fitness Studios in 2024

Three trends emerged in our experience and research as priority success factors for boutique studios today. Heading into 2025, we recommend all boutique fitness studios do these three things:

- Have a Game Plan for Retention
- Embrace Every Customer's Unique Journey
- Build A Strong Community as a Third Space

Let's dive into these three success factors and how you can think about activating them at your studio!



## Have a Game Plan for *Retention*

We're not surprised that our survey revealed that new client acquisition was the number one concern of studio owners - enrolling new clients takes a lot of work and attention! Unfortunately, this can leave a big blind spot when it comes to existing customer retention. It's important to strike a balance between building your client base and keeping existing customers coming back for more.

### **Why is Retention so Important?**

As a marketing rule of thumb, retaining an existing customer is far less expensive than converting a new one. But boutique fitness has a unique set of challenges to retention - it's a highly saturated market with a low barrier to exit. It's easy for customers to find an alternative studio or gym or workout at home.



# Acquisition & Retention: *How to Strike the Right Balance*

Here are *three tips* to keep in mind when thinking about retention:

1

**Leverage Marketing Automations:** Automation is a lifesaver for communicating with both new and existing customers. All it takes is a bit of setup, and you can execute a communication strategy that leverages multiple channels (text, email, and social) to nurture new visitors and maintains a connection with existing customers.

Michelle! Your first class is in the books! It was great meeting you today. Did anyone have the chance to share our new-client special?

2

**Personalize your Messaging:** Custom outreach can capture attention and increase engagement. You can personalize outreach based on their workout routines, classes they've attended, even send messages around their birthdays or anniversaries. And, hand-in-hand with our first tip, this can all be automated.

*Built-For-You:* Lean on proven marketing experts!

**Built-For-You by Mariana Tek** is a monthly subscription service for customers who need additional support for their marketing efforts! Through 1:1 strategy calls, performance audits, document templates, a network of trusted service providers and more.

“ I'm blown away by the attention and support from Built-For-You. We have learned so much and have improved our business greatly in such a short amount of time!

HOTBOX FITNESS

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3

**Turn Customers into Brand Loyalists:** Define what makes your studio unique, and celebrate that out loud through social media, your website, at local events, and hosting events at your studio. With strong community engagement and brand understanding, many customers will become brand loyalists and stay with you for the long haul. And as an added acquisition bonus, they'll send you direct referrals and post on social media.

## Embrace Every Customer's *Unique Journey*

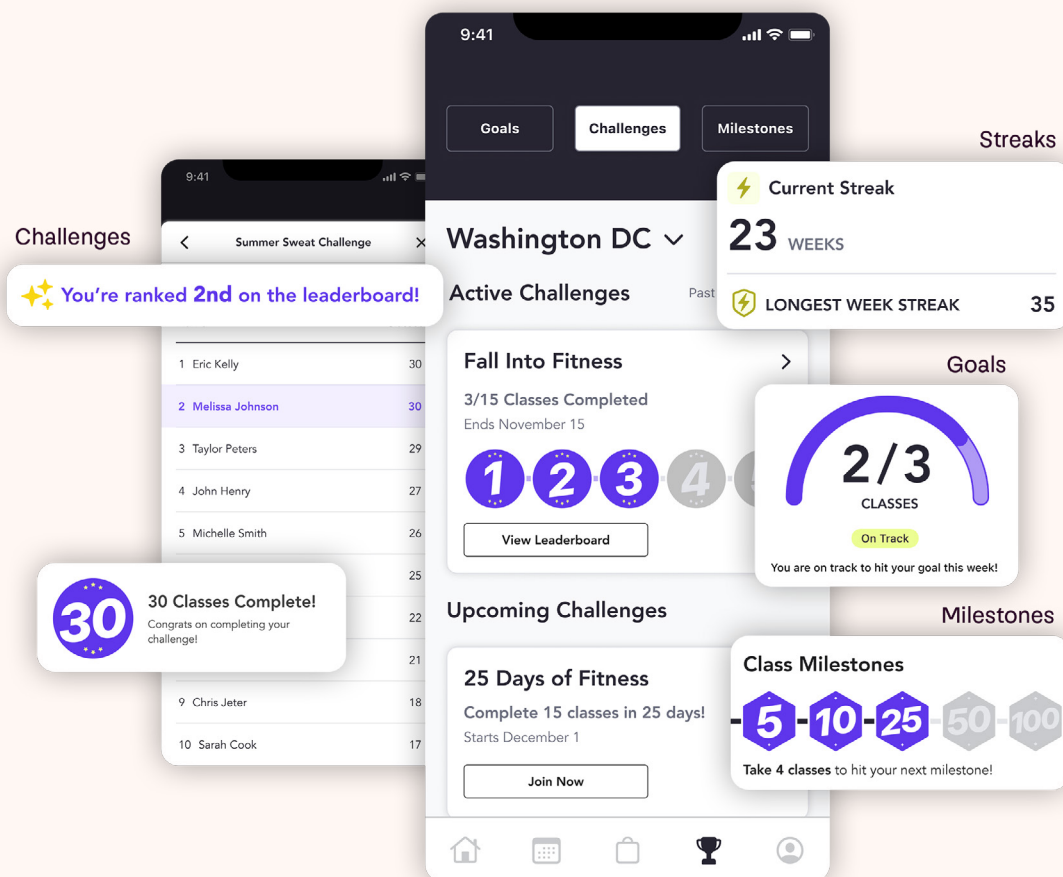
Every single one of your customers is on a truly unique fitness journey. Your success as a boutique studio is directly tied to how well you understand, support and encourage those journeys. This is one of the unique benefits (and challenges) of being a boutique fitness owner - larger commercial gyms don't have this requirement.

**Here are a few ways you can think about being a more supportive studio for all your unique customers in 2025.**

- **Support GLP-1's:** Ozempic and other GLP-1's have exploded in popularity, and estimates expect 9% of the overall population to be leveraging GLP-1's by 2030. This is a fantastic opportunity to support your customers by providing personalized fitness resources, particularly around combating muscle loss that is common for GLP-1 patients.
- **Test New Class Types:** According to our survey, 45% of studios are singularly focused and offer only one type of workout. This is a *huge area of opportunity* to capitalize on fitness trends and offer hybrid classes or totally new modalities. Survey your customers to find out where they'd want to test the waters - adding variety into the mix can help them stay motivated!
- **Collaborate with Wellness Partners:** McKinsey research shows that 82% of US consumers consider wellness a top priority in their lives - especially Gen Z and millennials. Your gym is one piece of your customers holistic health journey. Understand how things like spa treatments, nutrition, and mindfulness can help your customers achieve their goals, and look for ways to collaborate with leaders in those areas (like running a shared event, or hosting a free session with a guest instructor).

## PART III: THE KEY TAKEAWAYS

- **Leverage Gamification:** Getting motivated and staying consistent is the hardest part for many of your customers. Tools like gamification allow you to make class attendance fun and competitive. Recently, M3 used Mariana Tek’s gamification suite to run new summer challenges, which led to their most successful month of the year. This is a win-win, as owner Matt Chambers says, *“When challenges encourage students to cross-pollinate across classes, it’s very impactful to our business.”*



- **Celebrate Successes:** Embrace the mindset that when your customers succeed, *so do you*. If you’re monitoring their goals, you can help them celebrate as they achieve them. Showcase your most enthusiastic achievers on your social channels and website, or on a ‘congratulations’ board at your studio.

## Build a Strong Community as a *Third Space*

A strong community is what makes or breaks a boutique fitness studio. This is especially true for the growing number of Gen-Z buyers out there. This could be a post-covid desire for in-person connection, or a reflection of their digital exhaustion. Whatever the reason, Gen Z craves community. The most successful studios have built this feeling of community by embracing their role as the Third Space in peoples lives.

👉 **The secret sauce for brands today is making Gen Zs feel that they're part of a community — and inviting them to explore a whole universe of relevant touchpoints.**

**VOGUE BUSINESS**



## The Rise of the *Third Space*

The third space in boutique fitness refers to creating a space where people can relax, connect, and enjoy their time in an inviting, communal environment. The idea stems from sociologist Ray Oldenburg's theory of "third places," informal public gathering spots where people come together to unwind and socialize - beyond home (their first space) and work (their second space).

In the context of boutique fitness, studios that embrace the *Third Space* concept have several characteristics:

1

**Community Hub:** Boutique fitness studios serve as a social and community center. Clients come not just for the workout, but for the social experience—meeting friends, networking, or attending events like workshops or wellness seminars.



2

**Welcoming and Comfortable Environment:** The physical space of the studio is intentionally designed to be more than just a workout facility. It includes areas where members can hang out, such as a cozy lounge, juice bar, or retail section. The goal is to make members want to spend time there before and after class.

## PART III: THE KEY TAKEAWAYS

3

**Personal Connections:** Staff and instructors often take extra steps to connect with members on a personal level, creating relationships that go beyond just the fitness class. They might engage with members through social media, host events, or offer support on fitness and wellness goals.



4

**Holistic Wellness Focus:** Successful boutique fitness studios often incorporate elements of holistic wellness—offering services like nutrition counseling, meditation, spa treatments, or mindfulness workshops. This holistic approach appeals to clients seeking overall well-being, creating a deeper connection with the space.



MacroStax



xplor  
mariana tek

Exercise is *only 20% of the equation*. With our MacroStax partnership, studios empowered by Mariana Tek can offer year-round nutrition to their clients by offering a proven nutrition program they can trust.

# Conclusion.

As the boutique fitness industry continues to evolve, success hinges on a few key strategies: embracing retention, personalizing the client journey, and cultivating a strong community. The insights from this report highlight that, whether you're focused on growth through franchising, exploring new modalities, or leveraging tech for deeper engagement, the most successful studios are those that adapt to their clients' unique needs and create an environment that feels like a second home.

By focusing on these trends and fostering strong connections within their community, *boutique fitness studios can thrive in 2025 and beyond.*

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