

Global Boutique Gym Studios Market: Analysis By Exercise Type (Yoga, Pilates, & Barre, HIIT, Cycling, Cross Training & Boot Camps, Boxing & Martial Arts, Sports Performance Training, and Others), By Age Group (Below 17 Years, 18 to 34 Years, 35 to 54 Years, and 55 Years & Above), By Gender (Women and Men), By Revenue Stream (Membership Fees, Personal Training & Instruction, Services, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Boutique gym studios offer a personalized and intimate fitness experience, tailored to individual needs and preferences. Unlike traditional gyms, these studios focus on specialized training programs, often led by expert trainers in small group settings. This specialization allows studios to better cater to their customers' needs and provide a more tailored experience. The global boutique gym studios market was valued at US\$34.35 billion in 2023. The market value is expected to reach US\$54.81 billion by 2029.

The global boutique gym studio market has witnessed significant popularity in recent years with consumers increasingly turning to boutique gym studios for a more personalized and unique workout experience. The market has been growing due to several key factors driving consumer preferences and industry trends. Firstly, there has been a growing emphasis on personalized fitness experiences and specialized training programs, with boutique gyms offering tailored workouts and expert guidance to meet

individual needs and goals. This shift away from one-size-fits-all approaches seen in traditional gyms has attracted health-conscious individuals seeking a more immersive and effective fitness experience. Additionally, the sense of community fostered by boutique gyms, along with their premium atmospheres and state-of-the-art equipment, has contributed to their popularity among fitness enthusiasts. Along with this, the growing influence of social media is boosting the health and wellness trend. On the other hand, the younger generations are becoming more aware of the benefits of boutique gyms for maintaining physical and mental health, which is contributing to the market growth. The market is expected to grow at a CAGR of approx. 8% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Exercise Type: The report provides the bifurcation of the market into seven segments based on the exercise type: Yoga, Pilates, & Barre, High Intensity Interval Training (HIIT), Cycling, Cross Training & Boot Camps, Boxing & Martial Arts, Sport Performance Training, and Others. The yoga, pilates, & barre held the highest share in the market. Yoga offers a unique blend of physical exercise, mindfulness, and relaxation, making it appealing to a wide range of individuals seeking balance and stress relief. The personalized attention and specialized instruction offered in boutique settings enhance the learning experience, attracting those who value individualized guidance in perfecting postures and movements. As yoga, pilates, & barre exercises gain recognition for their therapeutic benefits, including stress reduction and improved posture, the demand for boutique gym studios offering these practices continues to grow. The HIIT segment is expected to be the fastest growing segment in the forecasted period. The popularity of High Intensity Interval Training (HIIT) in boutique gym studios stems from its proven effectiveness in delivering efficient, intense workouts with rapid results. HIIT appeals to time-conscious individuals seeking maximum fitness gains in minimal time, making it a perfect fit for boutique settings that prioritize quality over quantity.

By Age Group: The report further provides the segmentation based on the following age group: Below 17 years, 18 to 34 years, 35 to 54 years, and 55 years & Above. The 18 to 34 years age group held the highest share in the market, whereas the 35 to 54 years age group is expected to be the fastest growing segment in the forecasted period. The preference for boutique gym studios among individuals aged 35 to 54 years reflects a growing emphasis on health, vitality, and longevity as they navigate the challenges of midlife. This demographic values personalized attention, expert guidance, and holistic wellness offerings that address their evolving needs and priorities. Boutique gym

studios cater to this age group by offering diverse workout options, specialized training programs, and supportive communities that foster accountability and motivation.

By Gender: The report provides an analysis of the market based on gender: Women and Men. Women segment held the highest share in the market, whereas men is expected to be the fastest growing segment in the forecasted period. Boutique gyms appeal to men seeking high-quality workouts, expert guidance, and innovative training methods that deliver tangible results. These studios often specialize in strength training, high-intensity interval training (HIIT), and functional fitness, which resonate with men looking to build muscle, improve athletic performance, and challenge themselves physically. Boutique gym studios may also offer amenities such as state-of-the-art equipment, small group classes, and specialized workshops, catering to men's preferences for focused, goal-oriented training experiences.

By Revenue Stream: The report provides the bifurcation of the market into four segments based on the revenue stream: Membership Fees, Personal Training & Instruction, Services, and Others. Membership fees held the highest share in the market, whereas services is expected to be the fastest growing segment in the forecasted period. Membership fees are a primary revenue stream for boutique gym studios, providing consistent income through monthly or annual subscriptions. The convenience and flexibility offered by membership plans appeal to busy lifestyles, encouraging long-term commitment and retention among members. Moreover, boutique gym studios are enhancing their membership offerings by incorporating additional perks such as access to virtual classes, personalized workout plans, and exclusive events, further incentivizing enrollment. As boutique gym studios continue to innovate and adapt to evolving consumer preferences, membership fees are poised to remain a key revenue driver, supporting sustained growth and profitability in the industry.

By Region: The report provides insight into the boutique gym studios market based on the regions namely North America, Europe, Asia Pacific, and Rest of the World. North America held the major share in the market. In the US, people are becoming more health-conscious due to rising concerns about obesity and chronic diseases. For instance, according to the Centers for Disease Control and Prevention, six in ten Americans live with at least one chronic disease, like heart disease and stroke, cancer, or diabetes. On the other hand, as quoted by Healthline Media, it is estimated that a little over 42% of American adults are obese, while about 30.7% are overweight. Therefore, the rising concerns related to diseases fuel the demand for effective and efficient workouts that fit into busy schedules. Moreover, the region's growing appetite for personalized, niche fitness experiences and the consumer's willingness to invest in

high-quality health and wellness services would further support the market growth.

Asia Pacific is expected to be the fastest-growing region in the forthcoming years. Health consciousness is increasing in China due to various factors such as rising disposable incomes, urbanization, and concerns about air pollution and lifestyle diseases. As Chinese consumers become more aware of the importance of fitness and wellness, there is a growing demand for premium fitness experiences and personalized training options. This trend has created opportunities for big players in the fitness industry to establish boutique gym chains in China. These companies leverage their brand reputation, resources, and expertise to capitalize on the burgeoning health and fitness market, offering high-quality facilities, specialized classes, and tailored services to meet the needs of health-conscious consumers.

Market Dynamics:

Growth Drivers: The global boutique gym studios market has been growing over the past few years, due to factors such as rising purchasing power, rising number of social media users, increasing prevalence of obesity, growing millennials population, personalized fitness options, and many other factors. With millennials comprising a significant portion of gym membership holders, their increasing population directly impacts the growth of the boutique gym studios market. As millennials prioritize personalized fitness experiences, community engagement, and holistic wellness, boutique gyms align closely with their preferences. The growing millennial population translates into a larger customer base for boutique gym studios, driving demand for specialized classes, premium amenities, and social connections offered by these establishments. Additionally, millennials' propensity for digital engagement and social media influence further amplifies the visibility and appeal of boutique gym studios, attracting new customers and fostering brand loyalty.

Challenges: However, the market growth would be negatively impacted by various challenges such as high competition, dependency on key personnel, etc. Reliance on key personnel creates vulnerabilities for boutique gyms, as staff turnover or the departure of key individuals can disrupt operations and erode customer loyalty. If a popular trainer or instructor leaves, loyal clients may follow them to a competing gym, resulting in membership churn and revenue loss for the studio.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as virtual and on-demand fitness classes, growing investment in fitness industry, smart equipment, digital platforms and apps, etc. Digital platforms

and apps can accelerate the market growth of boutique gym studios by enhancing convenience, accessibility, and engagement for members. These platforms enable members to easily book classes, access workout schedules, and track their progress from their smartphones or computers. By providing a seamless and intuitive user experience, boutique gyms can attract and retain members who value convenience and flexibility in their fitness routines. Additionally, digital platforms and apps facilitate communication and interaction between members and instructors, fostering a sense of community and support within the gym's ecosystem.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic negatively impacted the market growth. With lockdowns and restrictions implemented worldwide to curb the spread of the virus, boutique gym studios faced closures, leading to a sharp decline in revenue and membership numbers. The intimate nature of these studios, often characterized by small class sizes and personalized training, became a liability in the face of social distancing mandates and health concerns. Many boutique gym owners had to swiftly pivot to virtual platforms to sustain engagement with members and generate income. However, despite these efforts, the transition to online classes posed logistical and technological hurdles, with some studios struggling to replicate the in-person experience effectively.

Competitive Landscape:

The global boutique gym studios market is fragmented. The key players in the global boutique gym studios market are:

F45 Training Holdings Inc.
Xponential Fitness, Inc.
Equinox Group
Orangetheory Fitness
Les Mills
CorePower Yoga
CrossFit
Solidcore
BoxUnion (Title Boxing Club)
SLT (Strengthen Lengthen Tone)
Barry's Bootcamp
Physique 57

Some strategies employed by boutique gym studios to expand their market share include opening new locations in high-demand areas, offering promotions and incentives to attract new customers, partnering with local businesses, and leveraging social media and influencer marketing to increase brand visibility and attract customers. For instance, Xponential Fitness, Inc. opened 557 and 513 new studios globally during the years ended December 31, 2023 and 2022, respectively. The company's member base today is approximately 60% larger than it was as of December 31, 2021. Moreover, in July 2023, Solidcore, the boutique fitness brand, announced that the company would be entering the San Francisco market, with two studios planned for 2024 in the Castro and Marina neighborhoods. Plans are underway to open even more Bay Area locations, including in Silicon Valley and the South Bay. Solidcore is also eyeing the Phoenix and Portland markets. Solidcore also plans to continue placing studios in cities across the Southeast and Southwest parts of the US, which are steadily growing in population. ?

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