External Trend Radar — Section 05: Market Intelligence

Status: Draft for administrator review. Not marked Current — approval authority rests with the administrator.
Prepared: August 9, 2026
Pass type: External only. MINDBODY, bank, and survey connectors were not available this cycle — see Section 7.

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1. Executive Summary

The core read from the last radar still holds: it's getting easier for anyone to open a studio that looks like Sol from the outside. Residential wellness amenities put a version of "the workout" in people's buildings, and AI-driven coaching apps put a version of "the guidance" in their pockets. Neither replaces what happens on the mat with a real teacher and a room full of regulars.

2026 market data adds two forces worth tracking. First, GLP-1 medication use is changing what studio members want from a class — more strength and metabolic support, less pure calorie-burn framing. Second, recovery is being sold as its own category now, not an afterthought to intensity — yin, restorative, and nervous-system-focused classes are drawing paying members on their own. Both trends point toward things Sol already does well: therapeutic sequencing, pacing that respects the body, and teaching that adapts to the person in front of it. Neither trend changes the underlying decision from the last radar. It sharpens where the advantage should show up in programming and messaging.

This pass draws on public industry research only. No MINDBODY attendance data, bank transaction data, or member survey responses were incorporated — those connectors weren't available this session. That's a real gap for a studio-specific read and is flagged below.

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2. Source-Backed Findings

Market growth is real, and pricing power is following it. The boutique fitness market is projected to grow at roughly 8% CAGR toward $59B by 2030. Average class pricing rose roughly 6% year over year, and attendance has climbed back to, and is projected to pass, pre-2019 levels.

Yoga is a top-three modality, but the category is blurring. Pilates leads boutique studio offerings (43%+), yoga and barre follow, with indoor cycling (19%) and HIIT (18%) behind. Multiple sources describe studios blending yoga, strength, and HIIT into single-format

classes to widen their audience.

GLP-1 medication use is reshaping what "fitness" means to members. Coaches and studios are reported to be shifting language and programming away from calorie-burn toward strength preservation, metabolic support, and mobility for members on GLP-1 medications. Some operators are building explicit "GLP-1 companion" tracks combining strength, nutrition coaching, and recovery.

Recovery is becoming a paid category, not a free add-on. Restorative, yin, gentle/hatha, fascial, and sound-focused classes are described as a growing, separately monetizable demand — not just a slower version of the main class.

Community and personalization are outcompeting scale. Several sources describe members prioritizing intentional programming and studio culture over high-capacity, transactional class formats — and describe community-building as a core business strategy rather than a marketing afterthought.

Discovery is shifting toward younger members and social platforms. Gen Z's share of boutique class visits is reported up 11% over three years, with the large majority discovering studios and formats through TikTok, Instagram, and YouTube rather than traditional search or referral alone.

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3. Evidence and Provenance

Finding	Source	Type	Note
Boutique market ~8% CAGR toward $59B by 2030; class pricing up ~6% YoY	[InsightAce Analytic](https://www.insightaceanalytic.com/report/boutique-fitness-market/3436), [Wodify](https://www.wodify.com/blog/boutique-studio-statistics-trends-owners-should-know)	Market research firm + fitness software vendor blog	Wodify is a studio-management software vendor; treat figures as directional, not audited
Yoga is a top modality; format blending (yoga/strength/HIIT) is rising	[PerfectGym](https://www.perfectgym.com/en/blog/business/boutique-fitness-industry-statistics-and-trends), [Mariana Tek 2026 Trends Report](https://www.marianatek.com/resources/2025-boutique-fitness-trends-report/)	Studio-software vendor blogs	Same caveat — vendor content, self-reported industry aggregation
GLP-1 medications reshaping programming toward strength/metabolic support	[Clubworx](https://www.clubworx.com/blog/10-of-the-biggest-fitness-trends), [Flutch.ai](https://flutch.ai/blog/the-wellness-business-in-2026-10-us-trends-reshaping-spas-studios-and-new-wellness)	Industry trend blogs	Directionally consistent across independent

sources; no primary clinical or attendance data cited by either |
Recovery (yin, restorative, sound, fascial) growing as a paid category	[WodGuru](https://wod.guru/blog/yoga-trends/), [Glofox](https://www.glofox.com/blog/yoga-trends/), [Flow Yoga](https://www.flowhoodriver.com/top-fitness-yoga-and-longevity-trends-for-2026.html)	Studio-software and single-studio blogs	Consistent theme across three independent sources
Community/personalization over scale; wellness expanding past the workout	[Trainerize](https://www.trainerize.com/blog/2026-fitness-studio-trends/), [Vibefam](https://vibefam.com/how-boutique-fitness-studios-are-growing-in-2026-u-s-market-trends-strategies/)	Studio-software vendor blogs	Same caveat as above
Gen Z share of visits up 11% in 3 years; discovery via social platforms	[Mariana Tek](https://www.marianatek.com/blog/6-trendsetting-boutique-fitness-studios-to-watch-in-2026/), [WellnessCreatives](https://www.wellnesscreatives.com/fitness-industry-statistics-growth/)	Vendor blog + industry stats aggregator	No underlying sample size or methodology disclosed by either source
Carried finding (prior radar, not re-verified this cycle): Residential wellness amenities and AI-enabled generic coaching are commoditizing facilities and basic programming	Existing Section 05 result (source not re-attached this session)	Prior Blueprint finding	Provenance for the original claim wasn't included in this session's inputs — administrator should confirm original source is still on file

Source-quality note: Most 2026 findings above come from fitness studio software vendors (Mariana Tek, Wodify, Trainerize, Glofox, Clubworx) publishing their own trend reports. These are useful for directional signal because several independent vendors converge on the same themes, but none disclose full methodology or raw data. Treat as market-sentiment evidence, not verified statistics.

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4. Assumptions or Inferences Requiring Verification

- **That Sol's membership overlaps meaningfully with the GLP-1 trend.** No data confirms what share of Sol's members use GLP-1 medications or whether they've asked for different programming. This is inferred from national trend data, not Sol-specific evidence.
- **That "recovery as a paid category" applies to Sol's local market.** The sourced trend is national. Whether Carmel/Zionsville members would pay separately for a recovery-focused class hasn't been tested.
- **That Gen Z discovery behavior applies to Sol's actual prospect pool.** Sol's target audiences per Brand Truth skew toward couples 30–45 and parents; the Gen Z discovery data may be lower-relevance for Sol's current positioning and is flagged, not assumed applicable.

- **That the "amenity arms race" framing from the prior radar still reflects the competitive set in Carmel and Zionsville specifically.** No current local competitor scan (new studio openings, apartment gym builds, corporate wellness partnerships) was performed this cycle.
- **That skilled teaching, belonging, consistency, local trust, and longevity outcomes remain Sol's most defensible advantages.** This is carried from the prior radar as owner strategy, not re-tested against 2026 data — it's consistent with what the research shows the market rewards, but that's an inference, not a measurement of Sol specifically.

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5. Operational Decision or Action Required

For administrator review — not yet approved:

1. **Confirm whether to hold the existing strategic stance** ("don't chase an amenity arms race; invest in teaching, belonging, consistency, local trust, longevity outcomes") or revise it given the GLP-1 and recovery-as-category findings above.
2. **Decide whether to pilot a recovery-forward class or messaging track** (yin/restorative positioned as its own offering rather than a lighter version of a hot class) — pending local demand signal, which isn't yet available.
3. **Decide whether GLP-1-aware messaging belongs in Content Engine or Conversion System prompts** (e.g., strength/mobility framing alongside existing beginner-reassurance language) — flagged for cross-module coordination, not duplicated here.
4. **Approve or defer a local competitive scan** (new studios, residential/apartment fitness amenities, corporate wellness entrants in Hamilton/Boone County) to ground the "commoditization" finding in local reality rather than national trend data alone.

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6. What Changed Since Last Update

- Added five new external findings (market growth/pricing, format blending, GLP-1 impact, recovery-as-category, Gen Z discovery) with sourcing.
- Prior radar's core finding (residential amenities + AI coaching commoditizing the basics) is carried forward unchanged — not contradicted by new data, but also not independently re-verified this cycle.
- No internal data (MINDBODY, bank, survey) was added this cycle. This is a change from what a full update should include, not a finding about the business itself.
- No local competitive scan performed.

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7. Next Update and Maintenance Method

- **Next update proposed:** November 2026 (quarterly cadence) — confirm this matches the administrator's intended review rhythm for Section 05; no existing cadence was supplied this session.
- **Missing evidence to close before then:** MINDBODY attendance/booking trends, bank transaction patterns relevant to member spend, current member survey responses, and a local competitor scan for Carmel and Zionsville.
- **Maintenance method:** This document is the single authoritative home for the External Trend Radar. Related detail — Sol's differentiation pillars, verified review data, and audience definitions — lives in the Brand Truth module and should be linked from here, not restated.
- **Owner:** Matt (administrator approval required before this replaces the current Section 05 content).