



## **Comparative Analysis of the HIIT Market: Orange Theory vs. Barry's Bootcamp**

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### **Abstract**

High-Intensity interval training (HIIT) has become popular amongst people who want practical, time-efficient workouts. Two leaders in this field, OrangeTheory Fitness (OTF) and Barry's Bootcamp (Barry's) have built strong brands around the HIIT method, each catering to a distinct audience with unique approaches. This paper compares these two businesses by analyzing critical factors such as workout structure, target audience, pricing, community engagement, and business models. While OTF emphasizes heart rate tracker, science-backed programming, and a widespread franchise model, Barry's creates an exclusive, intense environment with high-energy and central management. Through their differentiated strategies, both brands successfully attract and retain a large member base, with OTF focusing on broad accessibility and Barry's appealing to an urban, high-income clientele. This comparative analysis highlights the strength of each brand and its impact on the evolving fitness business.

## Introduction

As people become busier and busier, they are looking for easy ways to work out quickly that will still yield results. In recent years, the solution of high-intensity interval training has surged in popularity through brands such as Orange Theory and Barry's. High-intensity interval training, or HIIT, is a workout method that involves short bursts of intense exercise followed by brief rest periods [1]. This method allows people to burn more calories quickly by pushing the heart rate level to its maximum capacity during interval training. This practice is not done through steady-state cardio and strength traditional workouts. Due to the promise that HIIT workouts are time-efficient and an effective way to build muscle, lose weight, and boost metabolism, brands like OrangeTheory and Barry's have adopted it as their foundation for their workouts. These two brands offer a unique approach to HIIT workouts and are the most recognized brands leading this fitness approach. This analysis compares these two businesses in the HIIT market by examining critical aspects of their strategies, such as workout, structure, target audience, pricing, and overall experience. The advantages of each brand in certain areas will be determined by evaluating these factors.

## Background and Origins

Founded in 2010 by Ellen Latham in Fort Lauderdale, Florida, OrangeTheory Fitness (OTF) emerged as a response to the unmet needs of fitness customers who needed help to meet their desired goals and results. At 40, Latham lost her job as a fitness instructor and, with a young 9-year-old son to raise, opened a pilates fitness class in her garage to make money [2]. After some time, she realized that her customers, who were juggling pilates workouts with other forms of fitness such as running, gym, and walking, were not satisfied with the results that they were getting. Latham wanted to find a solution for her customers and focused on a science-based solution. During her research, she focused on creating a science-backed, heart rate-based training system offering practical and measurable results. What Latham came up with revolves around the "Orange Zone," a target heart rate zone where participants aim to spend at least 12 minutes to maximize calorie burn during and after the workout session [3]. Shortly after her findings, she opened her first studio in 2010 [2]. The studio was a success. So much so that a customer introduced the idea of turning the brand into a franchise and expanding to open more locations during one of her classes. Latham was skeptical about the idea at first but was quickly convinced. Over the years, OrangeTheory kept expanding and reached \$1B in system-wide sales by 2018 [2]. By 2022, OrangeTheory Fitness had expanded globally to over 1,300 studios in 23 countries with more than 1 million members. As of July 2024, OTF has over 1,500 studios across 50 US states and 24 countries [4].

Barry's Bootcamp, established in 1998 by Barry Jay in West Hollywood, California, began with a vision to provide clients with the high-intensity workouts that celebrities use to stay in shape [5]. Barry started his career by working in the entertainment industry as a fitness instructor, and that's where he came up with Barry's, a new fitness concept. Jay designed a workout concept that combined interval strength training with intense cardio. His goal was to create a workout that perfectly blends calorie-burning goals and muscle toning in a short amount of time. With the fierce workout Jay created, he focused on implementing the scenery of the workout room to match that intensity. A hallmark of Barry's is the "Red Room," a dark studio filled with red lights and loud, energetic music to fuel the participants through the intense session; the goal was to create a fitness studio with a nightclub vibe [5]. Initially, Barry's focused only on key urban markets before expanding internationally. Between 2011 and 2015, Barry's

expanded internationally to places like London, San Francisco, Norway, Boston, Miami, and Nashville [6]. From 2017 to 2018, Barry's expanded and opened its first studio in the Middle East. By 2018, Barry's became a global phenomenon [6]. Once COVID-19 hit, Barry launched a spin concept called Barry's Ride, bringing the idea of Barry's at Home. Currently, Barry's has over 70 locations in 16 countries [5].

Despite both brands being leaders in the HIIT market, OrangeTheory and Barry's cater to slightly different audiences and emphasize different workout philosophies. OrangeTheory is based on a data-driven fitness experience, while Barry's cultivated a high-intensity atmosphere of a full-body workout. While both brands have successfully positioned themselves at the storefront of the HIIT market, their branding and customer experiences offer distinct advantages based on personal fitness preferences.

### **Signature Offerings and Workout**

OrangeTheory Fitness stands out for its heart rate-based workout structure, specifically designed to maximize calorie burn during and after each session. The signature approach centers around spending at least 12 minutes in the "Orange" and "Red" zones since that's where the body achieves optimal fat-burning intensity; the orange zone consists of 84% - 91% of the maximum heart rate, and the red zone consists of 92%+ of maximum heart rate [7]. OTF emphasizes heart rate tracking and offers a monitor that clients can purchase to keep track of the time they spend in each heart zone. The emphasis on heart rate tracking enables participants to reach the afterburn effect, in which the body continues to burn calories post-workout. Moreover, OTF developed a "Splat point" system: each minute a client spends in the orange and red zones earns them a splat point [7].

OTF's workouts incorporate interval training, alternating between treadmill running, rowing, and floor-based strength exercises to deliver a full-body workout. This mix helps prevent monotony and keeps workouts dynamic and engaging while ensuring a balanced focus on power, strength, and endurance. The workout is built on scientific principles crafted to improve fitness efficiently [7].

OTF offers a variety of class times throughout the day, starting as early as 5 am and going as late as 8 pm. Each session is led by a certified coach who guides participants in their form and technique, corrects participants when needed, and offers motivation throughout the class to keep people on track. This coach-led format adds a personal touch to OTF, encouraging participants to push their limits safely and consistently.

Barry's Bootcamp offers a range of workout classes designed to accommodate different fitness levels and target specific body areas. Classes alternate between total-body workouts and sessions focused on the upper or lower body, allowing members to customize their workout plan based on their individual goals. Within each class, participants can adjust weights and treadmill speeds to suit their fitness level, making Barry's accessible to both beginners and experts.

For members preferring to work from home, Barry's introduced "Barry's At Home," during COVID-19, which offers four types of classes- body weights, bands, weights, and even some treadmill and weights classes from its in-studio experience [6]. To support home workouts, Barry's offers equipment like the "Band Together" kit, which includes resistance bands and mini bands, available through Barry's online store for \$32 [6]. Additionally, Barry's has expanded its offering with "Barry's Ride," a 50-minute workout combining 25 minutes of cycling and 25 minutes of strength training [6]. This unique format is a standout in the market.

## **Branding, Community and Perception**

Orangetheory Fitness (OTF) and Barry's share strong community-centered values based on close friendships and mutual support among their members. Each brand uniquely builds this sense of community.

OTF and Barry's cultivate a supportive, accountable environment where members encourage each other to reach personal fitness milestones. Members at both businesses often form tight-knit relationships and friendships during the classes; members bond over shared goals and experiences. Using different methods, both OTF and Barry's prioritize celebrating their members' achievements: OTF marks milestones of individuals during classes, and Barry's has the exclusive nickname of "fitfam" for their regulars. The sense of community both brands can build motivates members to attend classes since it makes their tough workouts more enjoyable and manageable.

OTF's approach to the community extends beyond the workout studio. With events like monthly lunches, weekend brunches, New Year's Eve parties, and special challenges, OTF emphasizes a social culture that brings members together both inside and outside the workouts [9]. Furthermore, the OTF app is a prime source of engagement with their members as they can track progress, rate workouts, and connect. They are able to extend their community outside of the workout experiences with branded hashtags and matching gear to build their strong brand identity. The motivational tone at OTF encourages everyone, regardless of fitness level or age, to maintain and develop good fitness habits for long-term goals.

On the other hand, Barry's places a unique emphasis on creating a local feel within each studio by incorporating hand-painted murals and decor that reflects the area's culture, giving members a sense of belonging to that specific location [10]. Barry's community vibe has a friendly competition element, motivating members to push their boundaries in class. The instructors and regulars at Barry's actively support new members; this tactic creates a welcoming environment where members can grow and not be afraid to join.

In essence, while both OTF and Barry's encourage mutual motivation and personal growth, OTF leans into a more structured social network approach, creating a large community that thrives both in and out of the studio. Barry's relies on its local, in-studio dynamics and cultivates an area-specific built community that resonates personally with each location's culture, creating a more intimate, competition-driven environment.

## **Business and Operational Model**

### ***Geographical Scope***

Orangetheory operates over 1,300 studios in 23 countries, making it one of the most widespread fitness franchises globally [11]. By early 2024, it had reached over 1 million members across 1,100 studios in 49 U.S. states and several other countries [11].

In contrast, with 70 studios across 14 countries, Barry's has a more concentrated presence but maintains locations in major markets, such as the U.S., UK, Australia, Singapore, and Norway [5]. Though smaller in scope, Barry's has a loyal following, with over 140,000 people attending classes weekly [12].

### ***Management***

Orangetheory relies on a franchise model, allowing independent owners to open studios under its brand after paying a franchise fee and adhering to standardized guidelines. This model

has fueled its growth and allowed for rapid international expansion. However, the franchise approach has introduced challenges with membership growth and brand messaging. Orangetheory's most recent merger with Anytime Fitness in 2024 created a larger fitness chain but also raised concerns among franchisees regarding brand identity and marketing effectiveness, as well as an increased focus on member retention through pricing and marketing adjustments [11].

In contrast, Barry's operates as a privately owned chain with investments from North Castle Partners and LightBay Capital, allowing it to maintain tight control over its brand experience across locations [13]. Barry's growth strategy focuses on establishing exclusive, high-end studios. This approach, championed by CEO Joey Gonzales, who has been with Barry's since 2004 and was appointed CEO in 2015, prioritizes a cohesive, premium experience that resonates with its urban, high-income clientele [6].

Orangetheory's franchise model enables its rapid expansion and reach but presents a few challenges with brand cohesion and marketing focus. While its science-backed interval training appeals to a wide demographic, some franchisees feel recent shifts in branding away from weight loss and toward general "personal transformation" have weakened its appeal.

On the other hand, Barry's benefits from its centralized management, which ensures that each studio maintains a consistent, high-quality experience across all locations. This centralized model has helped Barry's build a distinct, high-value brand identity, keeping members engaged with its innovative classes and community-focused approach. Both brands are well-positioned to address the evolving fitness landscape but must continue refining their strategies to maintain growth and member satisfaction in an increasingly competitive market.

### **Pricing**

Barry's fitness classes and memberships vary significantly based on location. In upscale areas like West Hollywood, California, prices are higher, with a single class costing \$34 and packages of 5, 10, 20, and 50 classes priced at \$165, \$325, \$630, and \$1,495, respectively [16]. Membership options in West Hollywood also range from \$245 for eight classes per month to \$475 for 20 classes per month [16]. In more modestly priced areas, like Charlotte, North Carolina, a single class is slightly lower at \$29, with packages priced at \$140, \$270, \$520, and \$1,225 for the same class increments [16]. Charlotte's membership ranges from \$155 monthly for eight classes to \$255 for 20 classes per month [16].

Orangetheory offers membership options and class packs that vary by region, with higher prices in premium cities like Manhattan, Brooklyn, and Los Angeles. Standard class packages are available in 10, 20, and 30-class bundles, priced around \$225, \$375, and \$499, respectively [17]. The Basic Membership, which offers four monthly classes, is \$79, the Elite Membership (8 classes) is \$119, and the Premier Membership, with unlimited classes, is \$179 monthly [17]. In high-cost areas like Manhattan, the Elite Membership can reach \$199, and the Premier can be \$279 [17]. One key advantage of Orangetheory's model is that memberships are usable across locations nationwide through surcharges that may apply depending on the studio's market.

### **Successes and Failures**

One of Orangetheory's primary strengths is its highly effective marketing and branding. By offering a free first class, OTF draws potential members in with a free first class, often leading to continued attendance due to the positive initial experience. OTF welcomes various ages, from teens to seniors, and its overall class environment is welcoming and inclusive. OTF

fosters a community where members interact, join exercise ‘challenges’, and participate in athletic events, promoting member inclusivity and engagement. The brand’s message of empowerment, with slogans like “We make it simple...be your personal best” and “MORE confidence. MORE life,” taps into a self-esteem-based appeal, making members feel that OTF can help them achieve their fitness and confidence goals [18].

Orangetheory’s success is also rooted mainly in its advanced use of technology. The studio’s heart monitors and wearable trackers display real-time results and play a central role in the customer experience. These visual metrics motivate members to push their limits and see progress. However, with that comes great challenges. When technological issues arise, such as internet or power outages, the classes must be canceled, which disrupts the experience and can frustrate members. Complaints also occur regarding the wearable trackers, as some members find them inaccurate or distracting, mainly when connectivity issues arise mid-workout [19].

Another major issue that catches members off guard is regarding OTF’s cancellation policy. When initially joining OTF, they market their membership without including the commitment requirement. However, once members want to cancel the membership they are bombarded with a hefty fee of \$179 regarding cancellation [19]. Many members are caught off guard by this and the lack of communication upsets many.

In summary, Orangetheory’s success lies in its solid community-building, motivational environment, and effective technology integration. However, its successes can also be hampered by challenges when addressing user experience issues and ensuring members’ expectations align with the brand’s approach to fitness results.

One of Barry’s significant strengths is building a unified and highly motivated team. Barry created a team spirit that drove its growth by focusing on shared goals and hiring an executive team aligned with the company’s vision. Investing in its brand values 2017 significantly allowed Barry’s to establish a more distinct identity and community connection. This was exemplified in its grand 25th-anniversary celebration, where the company created a fully immersive experience at a Hollywood film studio [14]. By bringing in high-end wellness stations, exclusive merchandise, and an impressive setup for 225-person classes, Barry’s demonstrated its dedication to delivering members a premium, memorable experience.

During the COVID-19 pandemic, a significant challenge arose in the fitness industry as quarantine had to take place. Barry’s quickly reacted by launching successful Instagram-based workouts, which drew thousands of participants. They also announced Barry’s At-Home virtual workout and Barry’s Outdoors, an inventive “silent-disco” workout format held on rooftops and parking lots [20]. These creative innovations allowed Barry’s to maintain its community and brand presence during social distancing.

Despite its successes, Barry’s faces criticism, especially regarding its class environment and evolving policies. The workout atmosphere, known for its intense and competitive spirit, can create a judgemental setting where participants who may be less advanced in their fitness journeys feel judged or unwelcome. Moreover, some members feel the brand is slowly shifting away from its core values, with policies making classes more generic and less exciting. For example, class durations have been shortened, and instructors are perceived as less skilled [15]. As class prices rise, some members feel the value no longer aligns with the cost [15].

Barry’s has built a strong brand and community through strategic team-building, unique events, and innovative responses to industry challenges. However, it faces obstacles in maintaining its original community-driven values and high-quality experience, which could raise concerns about the brand's future.



## Conclusion

OrangeTheory Fitness and Barry's Bootcamp represent distinct approaches within the HIIT fitness market, each built on solving customer needs. OrangeTheory's heart rate-focused approach is for people who want measurable progress in a structured setting, while Barry's attracts those who love high-energy workouts with a lively, social feel. OrangeTheory connects its community through events and digital tools, while Barry's fosters bonding within the local studio atmosphere. OrangeTheory has rapidly expanded globally through franchises, whereas Barry's focuses on quality control with fewer centrally managed studios. Both brands continue to adapt to fitness trends, successfully meeting the needs of clients who want practical, engaging workouts.



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