PEOPLE.
POTENTIAL.
COMMUNITY.
GROWTH.

STRONGER
TOGETHER.
POSSIBILITIES
EVERYDAY.

THE LITTLE GREEN BOOK OF POSSIBILITIES

HEALTH + FITNESS EDITION

Three things the category has missed and what to do about them.

MIND.
BODY.
COMMUNITY.

THE STUDIO OF POSSIBLE · INTELLIGENCE REPORT

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INSIGHT 01

The gym is the most important building in modern life.

Nobody is marketing it that way.

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The WHO declared loneliness a global health crisis. The gym is one of the last places adults build real, recurring human connection. That is an extraordinary thing to be — and nobody in this sector is marketing it that way.

Gen Z is nearly half of gym membership growth. 65% are increasing fitness spend despite inflation. 47% say community is why they stay — not equipment, not tech, not performance data. Run clubs tripled. HYROX sells out arenas. These aren't fitness trends. They're the same thing: people finding somewhere to belong.

Not one brand in this sector is marketing from that position. They're all still selling treadmills.

65%

OF GEN Z ARE INCREASING FITNESS SPEND DESPITE INFLATION — DRIVEN BY COMMUNITY, NOT FEATURES OR PERFORMANCE DATA.
SOURCE: LES MILLS GLOBAL FITNESS REPORT, 2024.

47%

OF GEN Z SAY COMMUNITY IS WHY THEY STAY — NOT EQUIPMENT, NOT TECHNOLOGY, NOT PERFORMANCE METRICS.
SOURCE: LES MILLS GLOBAL FITNESS REPORT, 2024.

WHAT THIS MEANS FOR THE CMO

You're not in the fitness business. You're in the belonging business. Gen Z will pay boutique prices at unprecedented scale, but only for brands that make them feel part of something. They're not buying a product. They're buying identity. ***Right now, that brief belongs to nobody.***

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INSIGHT 02

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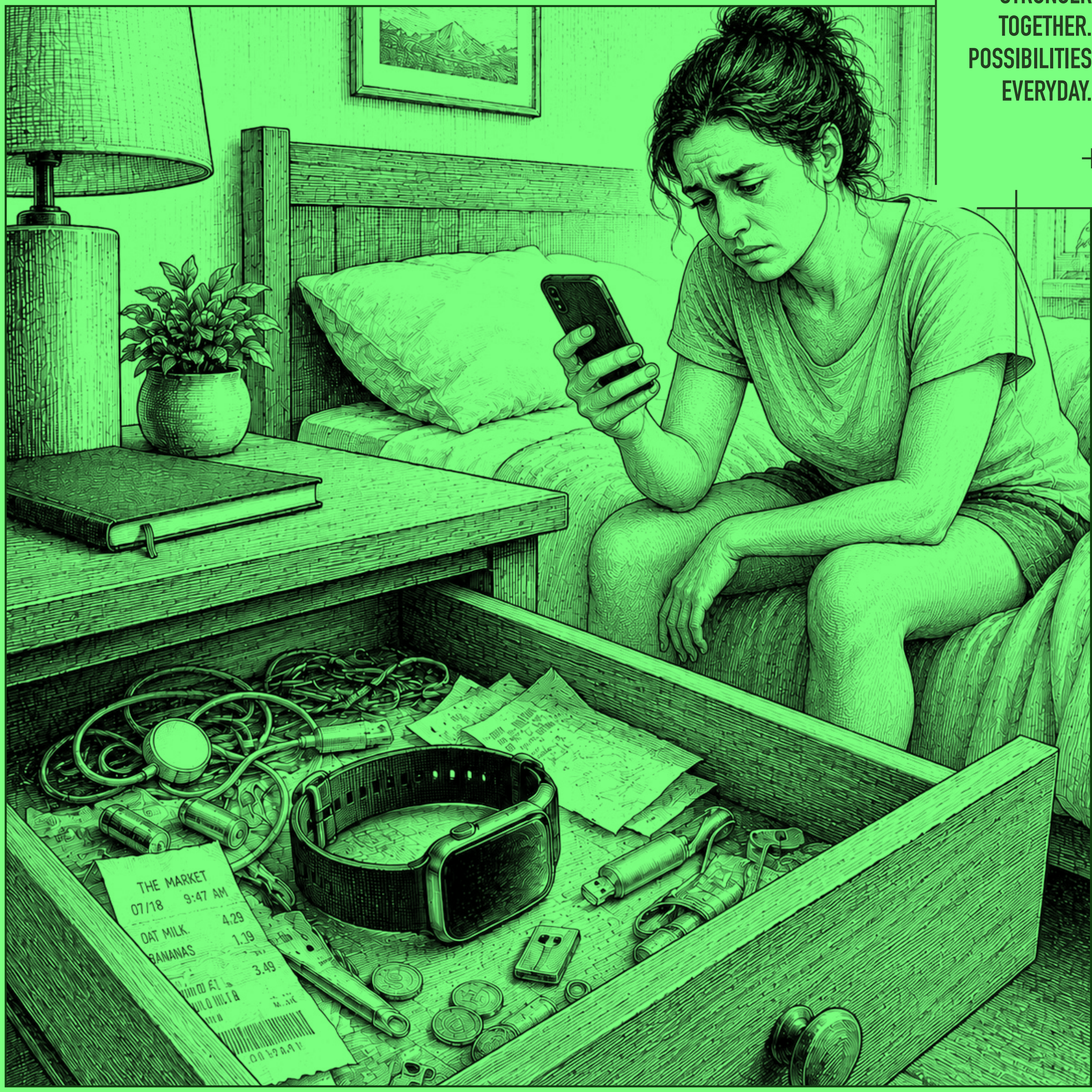
You didn’t lose them to a competitor. You lost them to a drawer.



The product works. It was never designed for 90% of the people who bought it.

Picture her: bought the wearable in January. Wore it for eleven days. The metrics confused her. The app assumed she already knew what a recovery score meant. The first week felt like failure. The product went in the drawer. She didn’t give up on her health. She gave up on a product that was never built for someone like her.

Your category has spent twenty years designing for the 10% who were going to be healthy anyway. The other 90% bought in hope and left in silence. Their money is in your revenue figures. Their experience is not in your case studies. That gap is not a product problem. It is a brand decision that has never been made.

30%

OF FITNESS WEARABLES END UP ABANDONED – NOT BECAUSE USERS GAVE UP ON HEALTH, BUT BECAUSE THE PRODUCT WAS NEVER DESIGNED FOR THE MAJORITY.
SOURCE: GARTNER CONSUMER TECHNOLOGY SURVEY, 2024.

90%

OF FITNESS PRODUCT BUYERS ARE NOT PERFORMANCE ATHLETES OR BIOHACKERS – YET THE ENTIRE CATEGORY MARKETS EXCLUSIVELY TO THE 10% WHO ARE.
SOURCE: MINTEL HEALTH & FITNESS CONSUMER REPORT, 2024.

WHAT THIS MEANS FOR THE CMO

Your next brief isn’t about reach. It’s about who you’ve been refusing to see. The 10% will always find you. The 90% are still waiting for a brand willing to build for someone like them. ***That position is completely unoccupied – and it’s the largest commercial opportunity in this category.***

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INSIGHT 03

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There is someone ready to buy from you.

You've never spoken to them.

There is a person right now with the budget, the problem, and the intent. Your brand has never once made them feel like it was built for someone like them.

They are not a runner. They are in a meeting room trying to justify a wellness spend to a board that wants a number. Or signing off a facilities budget with twelve other line items. Or a CFO handed a platform renewal they've never been given a reason to champion.

Your campaign has never spoken to them. Your case studies hero the athlete, the before-and-after. And so when the budget is available and the decision is theirs – your brand is background noise. Not because your product is wrong. Because your story never reached the right room.

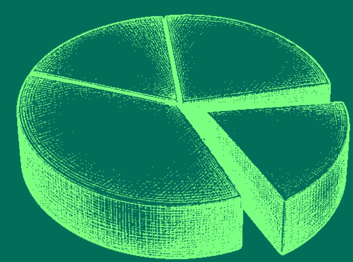
2×

B2B CONNECTED FITNESS IS GROWING AT NEARLY DOUBLE THE CONSUMER RATE – THE EMPLOYER AND CORPORATE WELLNESS BUYER IS THE FASTEST GROWING CHANNEL IN THE SECTOR.
SOURCE: IHRSA B2B FITNESS MARKET REPORT, 2024.

18mths

THE AVERAGE B2B SALES CYCLE IN THIS SECTOR WHEN THE BRAND STORY IS BUILT FOR THE END USER – NOT THE BUDGET HOLDER WHO ACTUALLY SIGNS OFF THE SPEND.
SOURCE: FORRESTER B2B SALES BENCHMARK REPORT, 2024.

WHAT THIS MEANS FOR THE CMO



That person is not hard to reach. They're in the same building as the people you've been marketing to for years. The brand that makes them feel seen first – that gives them the evidence they need to say yes – will close faster, retain longer, and face a different competitive landscape entirely. ***Right now that brand doesn't exist. That's the opportunity.***

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PROOF OF CONCEPT

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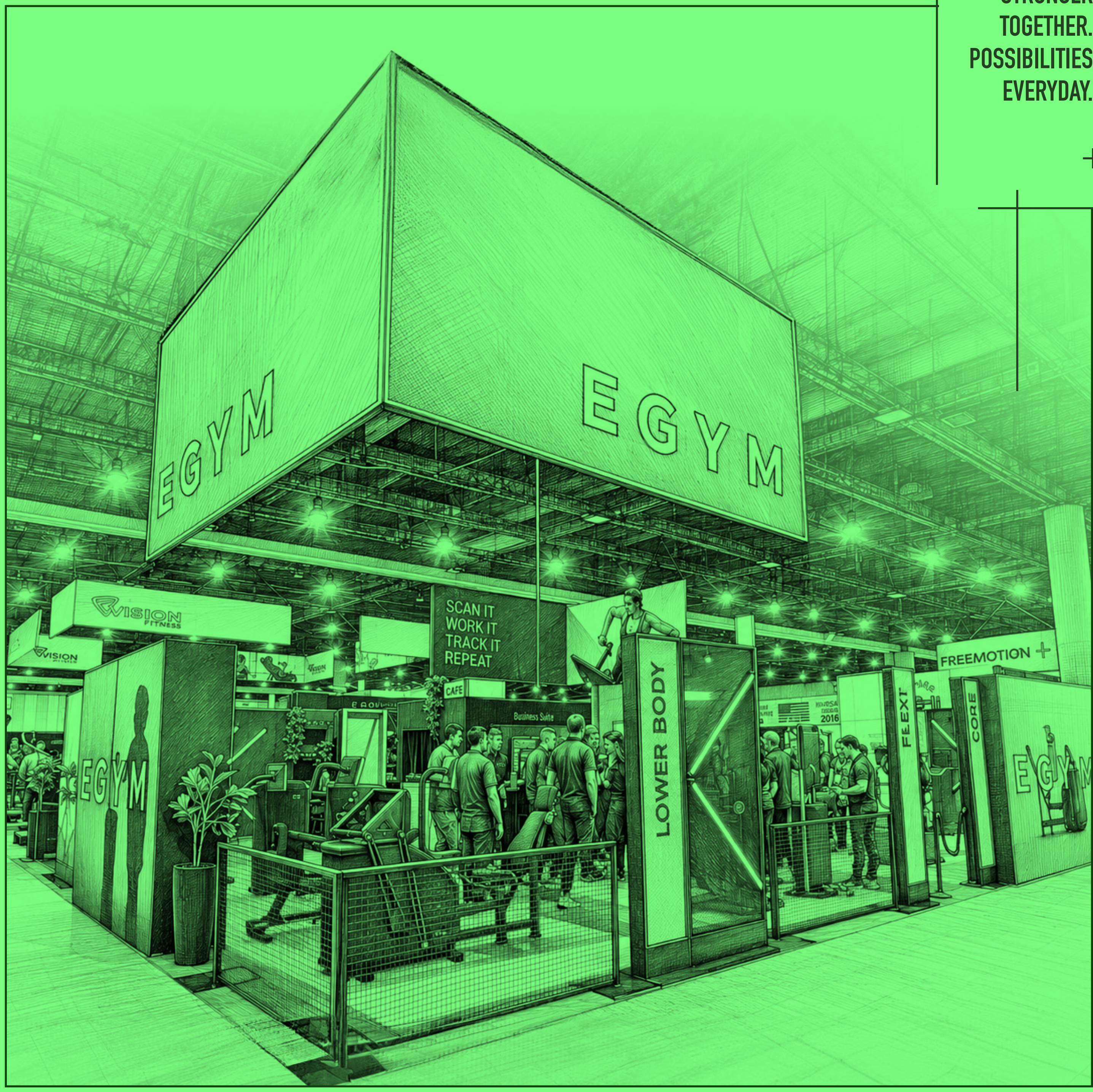
We understand this gap.

We proved it with EGYM.



When eGym came to us for their flagship product launch, we didn't build them a louder version of what the category was already saying. We built them a different conversation – one that reached the buyers the industry had learned to ignore. The budget holder – the gym operator, the corporate wellness lead, the facilities director – had never been given a reason to champion it. The result was a single event that moved the commercial needle by an order of magnitude.

> "It takes **EGYM** into a new space"

Alistair Hammer
HEAD OF MARKETING · EGYM EUROPE

EGYM

£1.2M	45%	221%
NEW PRODUCT DEALS SECURED OVER 3 DAYS AT HFA – FROM A REPOSITIONED BRAND STORY, NOT A BIGGER STAND.	YEAR-ON-YEAR INCREASE IN SALES CONVERSATIONS – BECAUSE THE MESSAGE FINALLY MATCHED THE DECISION-MAKER IN THE ROOM.	YEAR-ON-YEAR INCREASE IN NEW LEADS FROM A SINGLE EVENT – DRIVEN BY REACHING BUYERS THE CATEGORY HAD OVERLOOKED.

CLICK HERE TO SEE THE FULL STORY

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THE OPPORTUNITY

Which of these three positions does your brand own?

Somewhere right now, a member is drifting. A product is in a drawer. A budget holder is signing off on a competitor because nobody gave them a reason not to.

None of that is inevitable. ***All of it is a brand decision.***

Can you name the specific human emotion your brand relieves — not the product feature it delivers?

Does your current campaign reach the person who approves the budget, or only the person who uses the product?

What percentage of people who bought your product in the last 12 months are still actively using it?

We are a growth design firm that specialises exclusively in the strategy, brand and experience problems you've just read.

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START HERE

No long workshop. No bloated process. No wasted time.

STEP 1

THE 20-MINUTE CLARITY CALL

Before we speak, we review how your brand shows up — to the end user and to the budget holder. We look at your messaging, your campaign positioning, and where the buyer your brand ignores actually sits in the purchase journey. We arrive with observations already formed. No preparation needed. Twenty minutes.

STEP 2

THE EXTERNAL VIEW

If there's a clear opportunity, we come back within days with a specific perspective — the position your brand could own, what it would take to get there, and what it's currently costing you to leave it empty.

Both steps are free.

The clarity call takes 20 minutes.

The question is who moves first.

"If the problem is complex, good. That's where we do our best work."

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