

# FITFUEL

## Market Landscape

Stakeholder Report · June 2026

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**\$12-15B**

**Global market 2025**

*App revenue · multiple  
analysts*

**13-14%**

**CAGR 2026–2033**

*Grand View Research ·  
Polaris*

**3-8%**

**30-day retention avg**

*Business of Apps 2025*

**25%**

**Revenue now from  
apps**

*Record share · up from prior  
years*

01

## State of the Market

The global fitness app market is valued at approximately \$12–15 billion in 2025 and is growing at 13–14% compound annual rate, driven by AI capability expansion, wearable adoption, and sustained demand for flexible fitness solutions. Revenue growth is increasingly software-driven: app subscriptions captured a record 25% of total health and fitness industry revenue in 2025 as users retain hardware longer and platforms compete on coaching depth rather than downloads.

*Market size figures are consistent across Grand View Research, Polaris Market Research, and Business of Apps when scoped to app-only revenue. CAGR projections vary 11–15% across analysts by scope definition — treat as directional.*

02

## Three Trends That Matter

1

### **AI adaptation is an expectation, not a differentiator**

AI-powered personalisation is now baseline across Fitbod, Freeletics, Peloton IQ, Whoop Coach, and Ray. The competitive question in 2026 is not whether AI is present — it is how

the AI reasons. Adapting to biometric signals alone (the current state across the field) is increasingly insufficient. Adapting to life context, schedule disruption, and re-entry after lapse is the open design space.

*Validated. Competitor feature audit June 2026 and independent product reviews confirm biometric adaptation is table-stakes. Context adaptation remains unaddressed across the field.*

2

### **The market has shifted from acquisition to retention**

Fitness app downloads are normalising post-pandemic. Industry 30-day retention sits at 3–8%. Platforms gaining ground in 2025–2026 extend the user relationship across lapse events and motivation cycles rather than competing on feature volume. This trend directly favours a product positioned around adaptive re-engagement over initial onboarding.

*Partially validated. Retention benchmarks confirmed by Business of Apps 2025. Competitive advantage of re-engagement architecture is directional — supported by industry analysis, not independently quantified.*

3

### **Mental wellness and fitness have converged — the opportunity is in the framing**

Meditation, stress tracking, and breathing content are now standard in Apple Fitness+, Peloton, Centr, Aaptiv, and Noom. Adding a competing wellness feature set would not differentiate FitFuel. The relevant opportunity is framing: exercise itself produces measurable mental health benefits confirmed by multiple peer-reviewed meta-analyses (BMJ 2024; British Journal of Sports Medicine 2026). An AI coaching tone that communicates movement in terms of mood and energy outcomes — rather than calories and metrics alone — serves all three target audiences without requiring a separate feature layer.

*Market convergence documented (Feed.fm 2026 Digital Fitness Ecosystem Report). Exercise–mental health link validated by peer-reviewed meta-analyses. Tone-as-mechanism is directional — requires microcopy and user interview validation.*

03

## **Two Underserved User Segments**

### **Segment A The irregular exerciser**

Spanning both the Time-Constrained Professional and the Returning Routine Builder, this group shares a documented core barrier: not lack of motivation, but lack of a product that accommodates an irregular and disrupted relationship with routine. UK Biobank accelerometer data (~90,000 participants, Circulation 2024) confirms that concentrating exercise into one or two sessions per week produces comparable health outcomes to distributed daily training. Both sub-groups exhibit the same dropout mechanic: when a plan breaks, they abandon the app rather than adapt the plan. Gender disaggregation of retention data shows women drop off faster, with body image anxiety and social role pressure as additional barriers (JMIR mHealth 2026).

**Design direction** *Research evidence suggests these two sub-groups may be more productively treated as one primary persona sharing a single design challenge. Validate or disprove through primary user interviews.*

### **Segment B The access-needs user**

Users with disability, chronic illness (ME/CFS, POTS, Long COVID), injury recovery goals, or anxiety around mainstream fitness culture are systematically excluded by current product defaults. Activity Alliance research indicates 90% of users with impairments believe they are underserved by the app market. The design failure is structural: mainstream apps default to calorie deficits, step goals, and progressive load escalation — which are clinically contraindicated for some conditions. Users in this group specifically adopt products built by or for people who share their experience.

**Design direction** *This segment carries the highest design risk. WCAG 2.2 AA compliance is necessary but not sufficient. Clinical advisory input is required before any AI recommendation logic is built for this audience.*

90%

**Users with impairments report being underserved**

*Activity Alliance data · Accessercise 2023*

70%

**Want to improve or maintain physical health**

*Same source — demand is present, products are not*

04

## Three Whitespace Opportunities

*Each opportunity below results from synthesis across market landscape, competitor audit, and user behaviour research — not from feature scanning alone.*

### OPPORTUNITY 01

#### Lapse recovery as a first-class product feature

Every current fitness app is architected for users who show up. None is architected for users who stop and need to re-enter. The UCL and Loughborough University social listening study (58,881 posts, British Journal of Health Psychology 2025) documents that users abandon the app rather than adapt the plan when routines break — consistently across all three target segments. Streak mechanics and historical performance displays amplify shame and delay re-entry. No current competitor — including Fitbod, Freeletics, Future, Peloton IQ, or Ray — has a lapse-recovery architecture that detects an engagement gap, estimates physiological detraining by elapsed time, and presents a rebuilt re-entry plan without framing the gap as failure.

**Design implication** *An AI that detects lapse, estimates detraining, rebuilds the plan from current fitness state, and frames re-entry without surfacing the absence. Serves all three target segments.*

● ● ● ● ● Evidence strength — High

**Validation** *Competitor gap confirmed by June 2026 feature audit across eight products. Behaviour documented by peer-reviewed social listening study. Product mechanism is directional — validate through primary user interviews.*

### OPPORTUNITY 02

## Context-aware scheduling, not only biometric-aware scheduling

Current AI adapts to the body. No current product adapts to the calendar. Fitbod, Freeletics, Whoop Coach, and SensAI surface recommendations driven by biometric signals — HRV, sleep, training load. None reason from schedule context: a meeting overrun, a travel day, a week of compressed availability. UK Biobank data confirms that the weekend-concentrated exercise pattern — the Time-Constrained Professional's actual behaviour — is physiologically equivalent to regular daily exercise, yet every major app treats it as a deviation to correct rather than a lifestyle to serve. An AI that redistributes weekly load intelligently across available windows without requiring manual input would serve documented behaviour rather than work against it.

**Design implication** *AI that reasons from scheduling signals in addition to biometric signals, redistributing load without requiring the user to manually log every constraint.*

● ● ● ● ○ Evidence strength — Medium-high

**Validation** *Weekend warrior health equivalence validated (UK Biobank, Circulation 2024). Schedule-driven dropout documented. AI calendar-reasoning mechanism is directional — requires interview and technical feasibility validation.*

### OPPORTUNITY 03

## Mental wellness as coaching tone, not a feature category

Adding a meditation library would not differentiate FitFuel in a market where Apple Fitness+, Peloton, Centr, Aaptiv, and Noom already include mental wellness content. The design opportunity is at the language level. A 2024 BMJ meta-analysis confirmed that walking, jogging, yoga, and strength training all reduce depression, with effect increasing with intensity. A 2026 British Journal of Sports Medicine umbrella review confirmed the effect holds across populations. What current apps do not do is communicate exercise in these terms. For the Returning Routine Builder facing re-entry shame, the Time-Constrained Professional managing stress load, and the Access Needs user anxious about fitness culture, framing movement as a mood and energy intervention is more directly relevant than adding a breathing tab.

**Design implication** *AI microcopy and coaching tone that frames outcomes in mood and energy terms alongside physical metrics — across onboarding, plan summaries, re-entry moments, and achievement language. Lowest build cost of the three; broadest cross-segment applicability.*

● ● ● ● ○ Evidence strength — Medium-high

**Validation** *Exercise–mental health link validated by peer-reviewed meta-analyses (BMJ 2024; British Journal of Sports Medicine 2026). Tone-as-mechanism recommendation is directional — requires microcopy testing and interview validation.*

05

## Recommended Next Steps

| #  | ACTION                           | PURPOSE                                                                                                                                                                                                                                                           |
|----|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01 | <b>Primary user interviews</b>   | Validate the shared-barrier hypothesis for Segment A. Test whether the Time-Constrained Professional and Returning Routine Builder share a single design challenge. Probe lapse recovery behaviour, schedule expectations, and AI recommendation trust threshold. |
| 02 | <b>Access-needs recruitment</b>  | Begin recruiting one to two participants with chronic fatigue, mobility limitation, or fitness culture anxiety. Current evidence for Segment B is review-level. Primary research is required before any design commitment.                                        |
| 03 | <b>Competitive feature audit</b> | Structured audit of eight to ten apps against the three whitespace opportunities. Confirm that lapse-recovery architecture, context-aware scheduling, and wellness-as-tone are genuinely absent, not just non-visible in the current product set.                 |
| 04 | <b>Source validation log</b>     | Update the FitFuel Source Validation Log with all claims in this report. Hypothesis-level claims must be resolved or explicitly flagged before the report is shared more broadly.                                                                                 |