

GUTCHECK

Health and Fitness Apps

Agile Attitudes & Usage™ Study

GutCheck® ®

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BACKGROUND & OBJECTIVES

Millennial consumers today are increasingly interested in maintaining balanced and healthy lifestyles. Brands are taking advantage of these healthcare trends by creating apps and tools to help consumers find the right program for their health and fitness goals, crowd-sourced motivation to encourage staying on track, and health tips and advice. The introduction of social media to this generation has also created a new resource that is available to consumers. Individuals are leveraging social media platforms to acquire followers while creating brands and programs around their own healthy journey success. These individuals don't follow traditional advertising methods, but are able to reach consumers more directly because of their popularity through social media channels.

Health and fitness has always been a craze, but advertising and media consumption has become more accessible to consumers through social media channels. Additionally, apps and devices that can track progress and make data available have dramatically changed the way consumers learn and think about their own health. These advancements make it incredibly challenging for companies to understand the competitive landscape of the category, and to identify what barriers and triggers exist for consumers to choose an app or tool to incorporate into their regime.

What apps are consumers using today to influence their health and fitness regimes, and how can companies, who make these types of apps, better reach and message to their target audience?

Objectives:

- Identify key apps consumers use to influence and motivate their current health and fitness regimes
 - Topics to Explore: What consumers are able to learn or track through these tools, what data they view as important to have access to
- Determine why apps in this category are useful to consumers, and what features are “must haves”
- Identify how consumers learn about these apps and what would encourage them to consider incorporating a new tool into their toolkit

METHODOLOGY

This study was conducted via an online quantitative survey. Each survey lasted approximately 10 minutes.

Audience	
Gender	Male & Female
Age	18-35
Region	Capture
Kids in HH	Capture
Exercise	Exercise at least weekly
Social Media	Use Facebook, Instagram, or Twitter daily
App Usage	Use health and/or fitness app
Health and/or Fitness App Awareness & Usage	Capture

Method	# of Respondents
Agile A&U™	700

Survey clicks were balanced to population level data on Age, Gender and Region, to ensure a natural fallout of the sample.



EXECUTIVE SUMMARY

USER OVERVIEW

Most health and fitness app users have been using their apps for a couple years or less, primarily to track weekly exercise in order to lose weight

Usage Motivation



35%

use a health and/or fitness app **to lose weight**

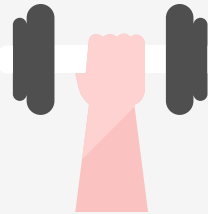
Frequency of Exercise



45%

exercise **4-6 times** a week

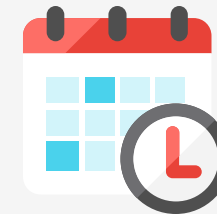
Used For



41%

Use a health and/or fitness app solely **to track exercise**

Length Used



80%

Have been using a health and/or fitness app for **2 years or less**

Number of Apps used



60%

Currently **use more than one** health and/or fitness app

MOST USED APPS

Currently Fitbit, MyFitnessPal, and the iPhone Health app are the most used among health and fitness apps



- Fitbit users are **evenly split in gender** with 50% male and female users
- Users are split between using health and fitness apps **to lose weight and just looking to track/be aware of health**
- Users are more likely to use an app just for exercise tracking
- 51% of these users primary frustration with achieving their health and fitness goals is a **lack of motivation**
- The top usage consideration among these users is **ease of use** and on average these users have less barriers to usage



- MyFitnessPal users are **predominantly female**, with 61% being women
- The top reason for using an app among these users is **to lose weight**
- Users of this app are more likely looking to track food *and* exercise
- 48% of these users say **time is a top frustration** to achieving their fitness goal
- **A third of these app users also use MapMyRun** (a sister app of MyFitnessPal) showing connectivity and collaboration between apps for different benefits is impactful
- Among these app users, **cost appears to be more of a barrier than others**



- iPhone Health app users are **also evenly split in gender**, with 51% female and 49% male
- 68% of users **are looking to either lose weight or just track/be aware of health**
- 49% of these users selected **lack of motivation** and 49% selected **time** as the top frustrations with achieving their health and/or fitness goals
- This app also has significantly more **younger Millennial users** (18-24) than Fitbit and MyFitnessPal

APP FINDINGS

Targeting users on social media with a free trial and messaging that highlights unique features for goal setting, weight, calorie, and exercise tracking will likely increase consideration

Learn About

33%

Learn about *new* apps on **social media**; 29% learned about the app they use most from the app store/Google Play

Usage Considerations

52%

Are looking for a **free app** when considering a health and/or fitness app; 45% are looking for one that's **easy to use**

Barriers

43%

Say a **monthly subscription** cost has kept them from downloading/using an app

Triggers

39%

Would try a different app if it had a **new feature** they wanted; 37% if they were given a **free trial** of it

Desired Data Tracked

54%

said **exercises/workouts completed** is the most important to track, followed by **calories** and **weight**

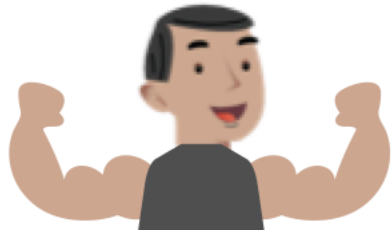
Desired Features

30%

Or so are looking for some form of **goal tracking**; otherwise users are less clear in the features they prefer

MESSAGING

Messaging should also vary by gender, especially if a brand is looking to create a gender specific health or fitness app, as men and women look for different things



I exercise almost every day, and as a result look for a few apps to help me track and complete a variety of workouts and stay up to date on my health. I'll likely try a new app if I think it looks higher quality, innovative, and compatible with my other apps and devices—but it will still need to track my exercise and heart rate. Either way if it's really good quality I may even be willing to pay for it!

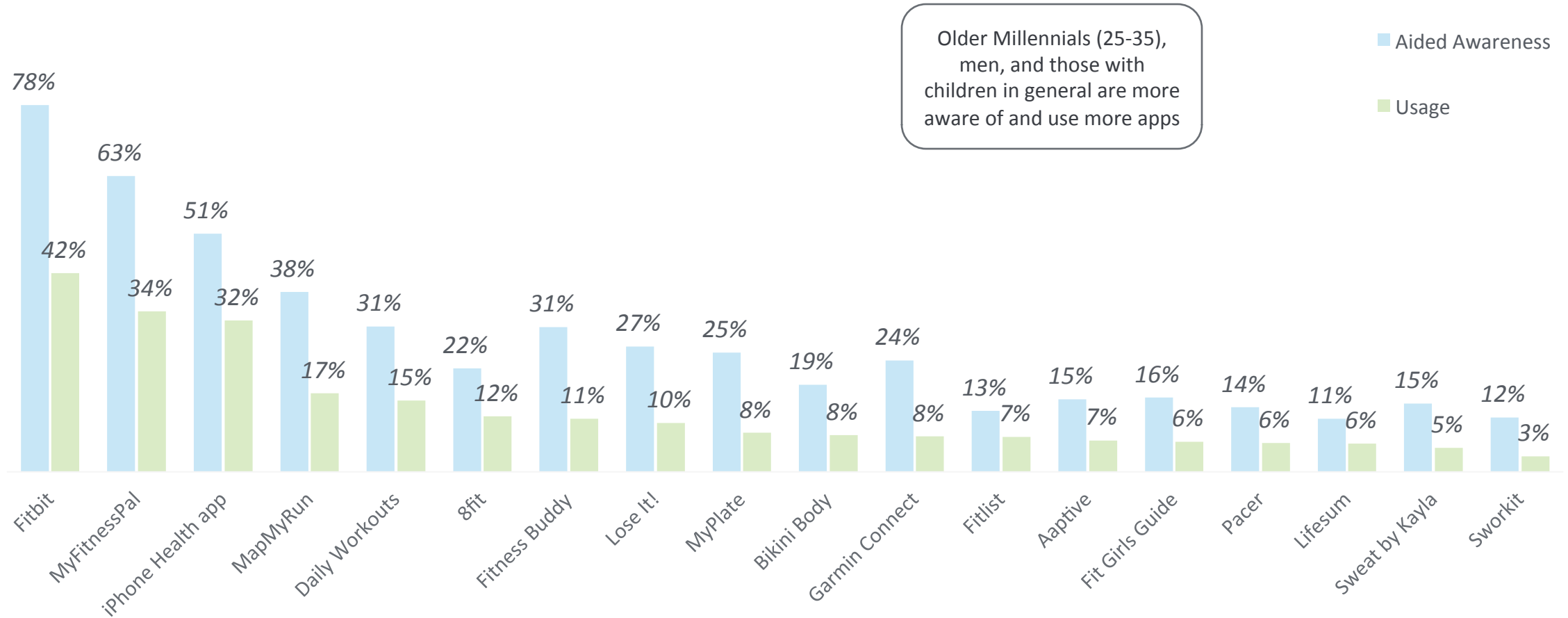
I use health and fitness apps mostly to help me lose weight and track exercise. I track my exercise when I have the motivation to actually workout, but sometimes track my eating too. I'm looking for an app that's personalized to me, especially with goal setting. An app that's free or has a new feature is more likely going to interest me, especially if I see it on social media or my friends and family tell me about it.





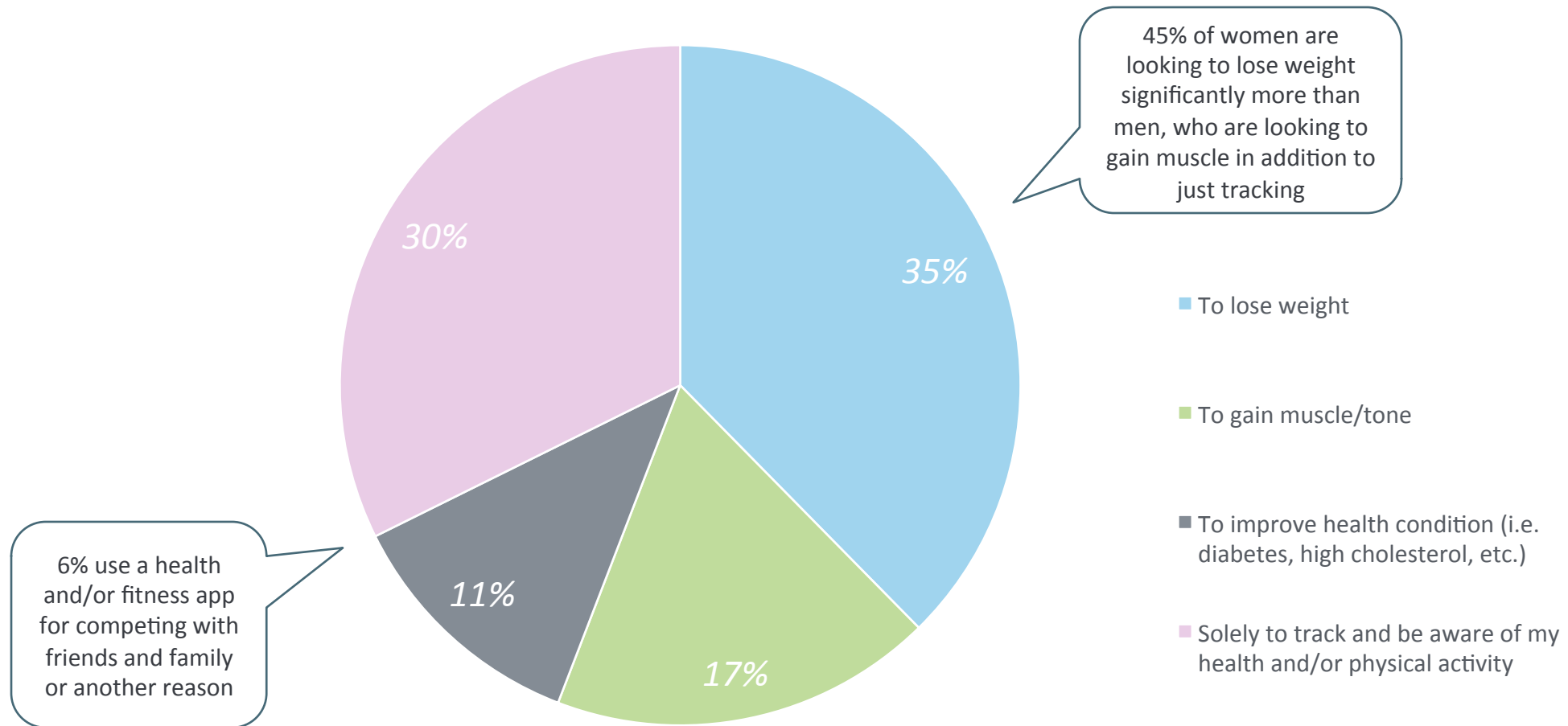
DETAILED FINDINGS

Users are more familiar with and use FitBit, MyFitnessPal, and the iPhone Health app the most



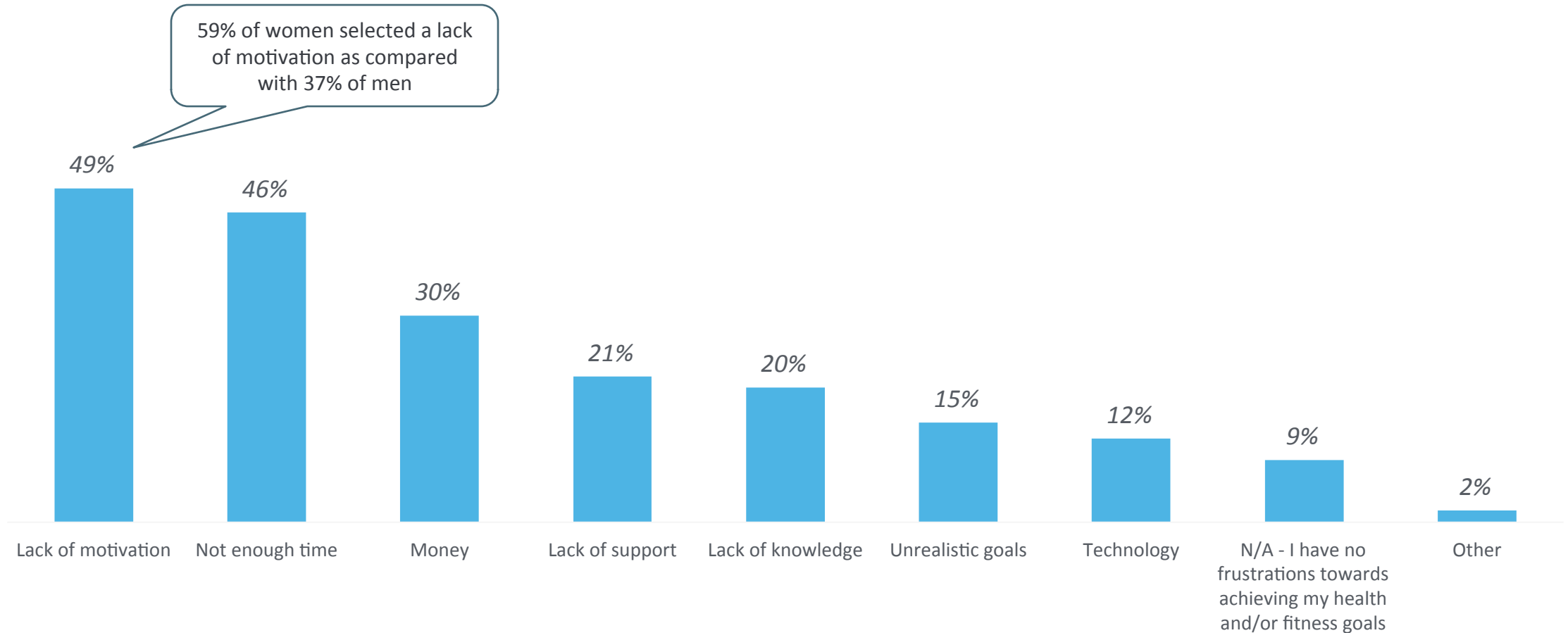
Which of the following health and/or fitness apps have you heard of before? Which of the following health and/or fitness apps do you currently use?

Losing weight or just tracking and being aware of health are the main goals for using a health and/or fitness app



Which of the following is the primary goal you have for using a health and/or fitness app?

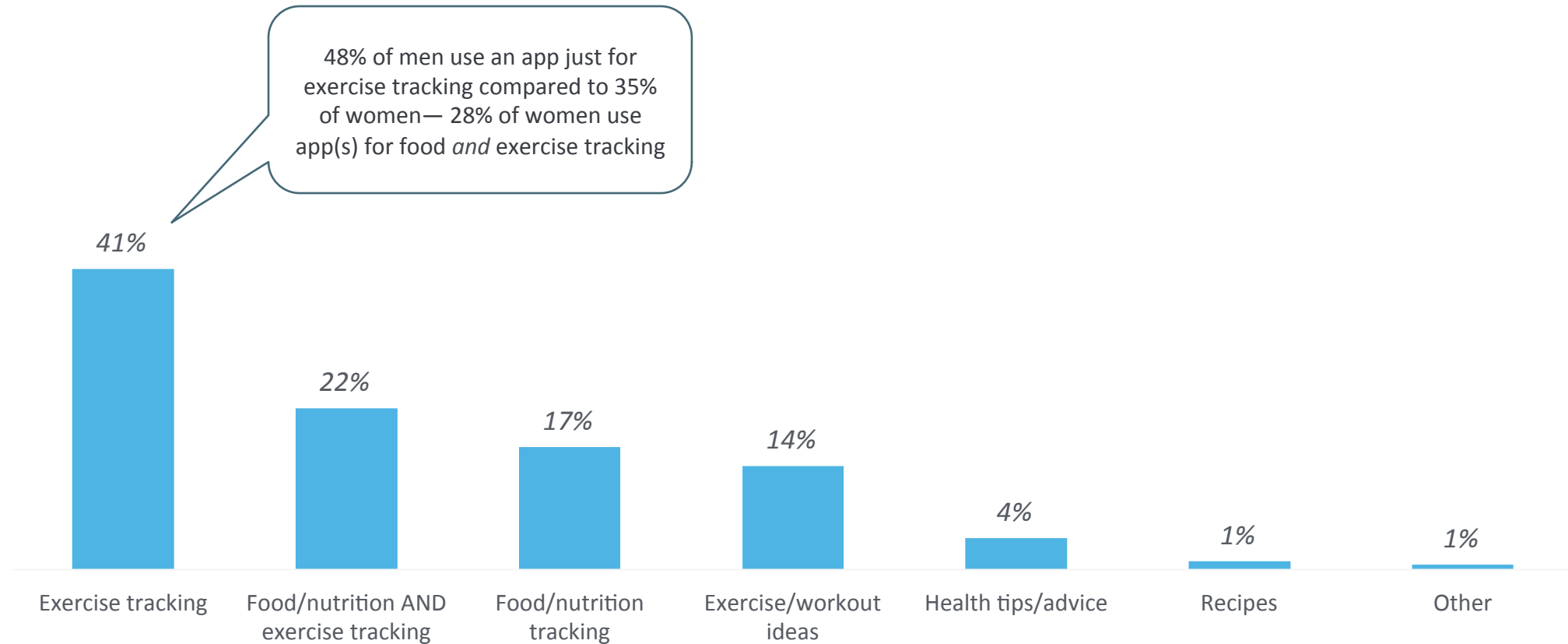
A lack of motivation and time are the primary frustrations towards achieving a health or fitness goal



Which of the following, if any, is a frustration you have towards achieving your health and/or fitness goal?

APP USED FOR (n=700)

Exercise tracking is by far the top use for a health and/or fitness app

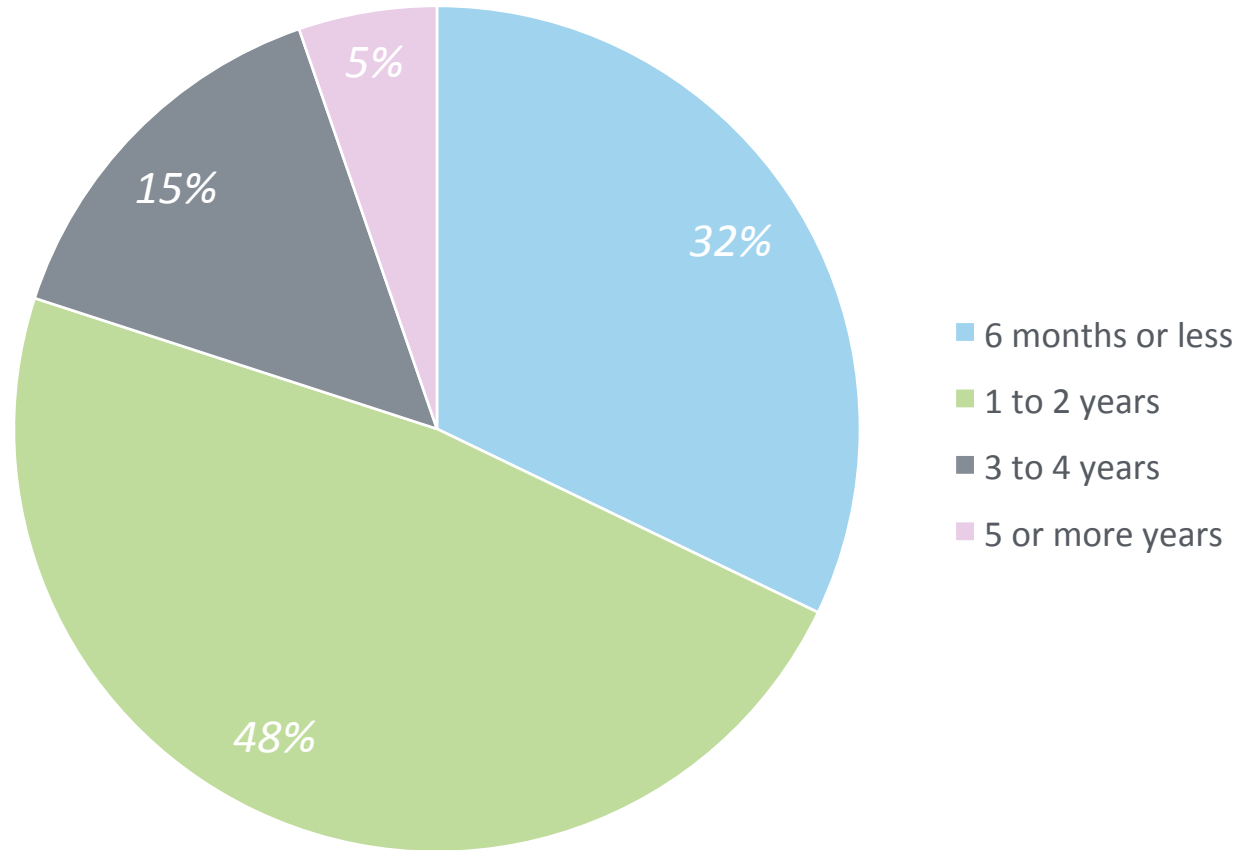


Which of the following do you use a health and/or fitness app for most?

LENGTH OF TIME USE (n=700)

A large majority of users have just started using an app in the past two years or less

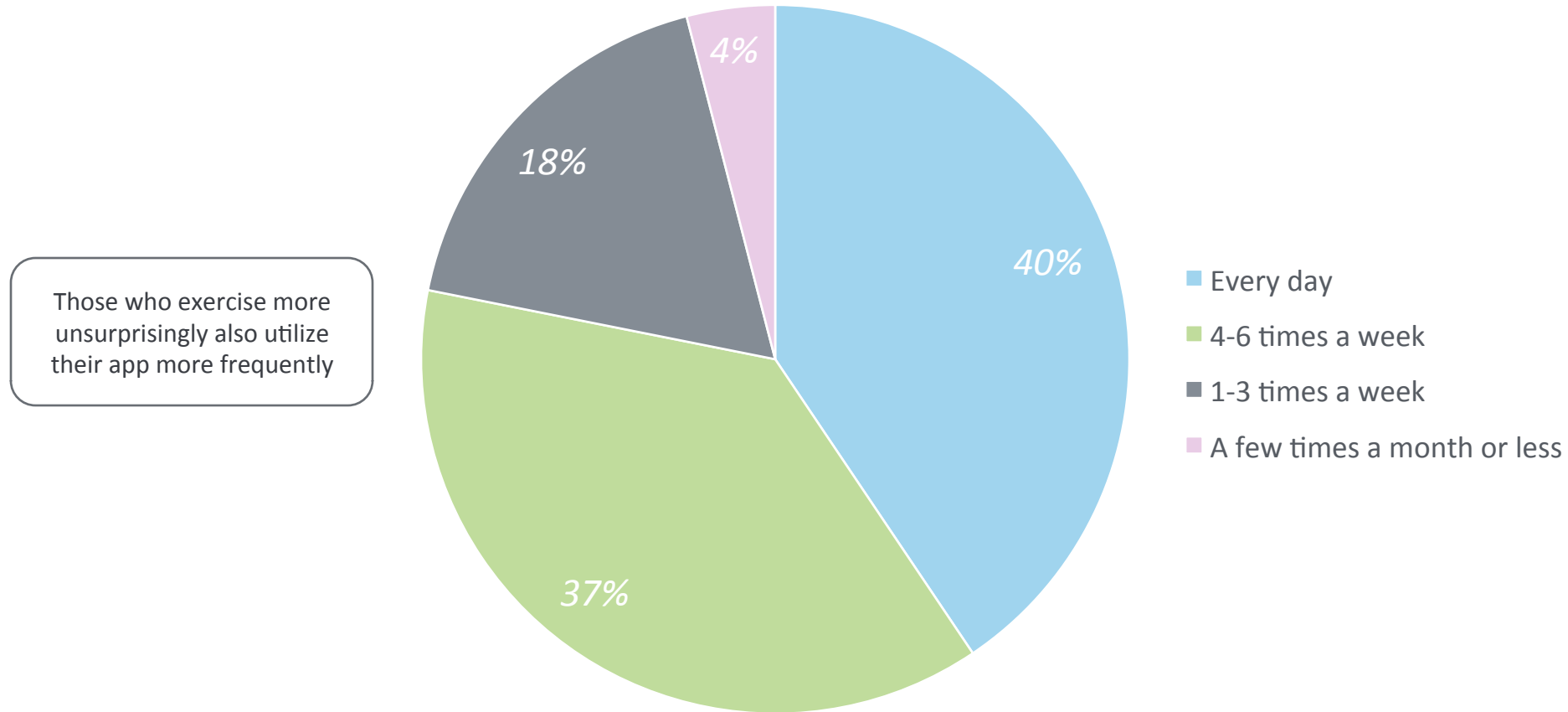
Those who use multiple apps have been using their apps for a longer period of time showing they're more likely to adopt a new app *in addition* to their current one(s)



How long have you used a health and/or fitness app?

FREQUENCY OF USE USE (n=700)

Health and fitness app users utilize their apps regularly, most often each day or every week

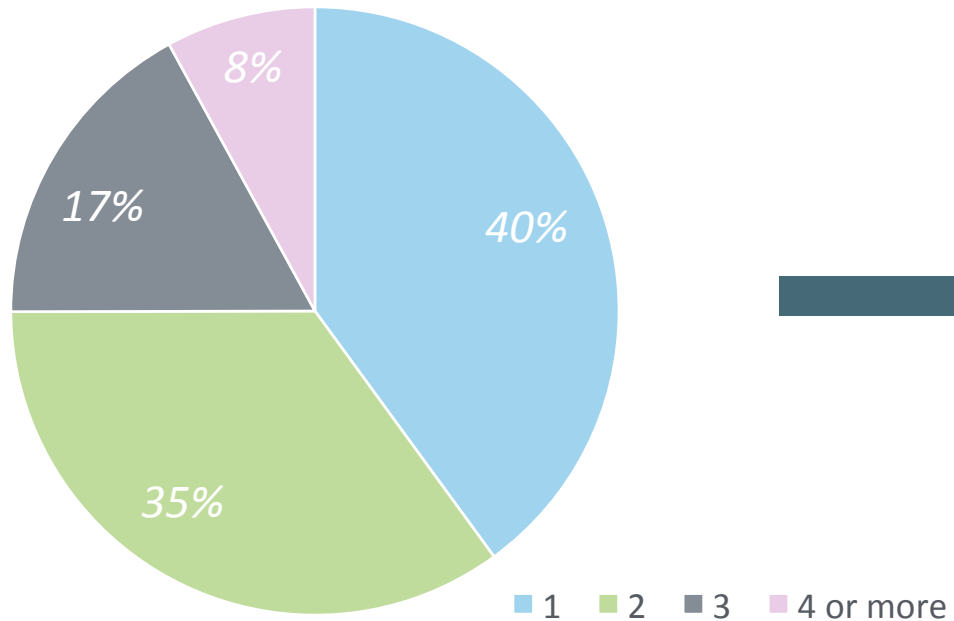


How often do you typically use a health and/or fitness app?

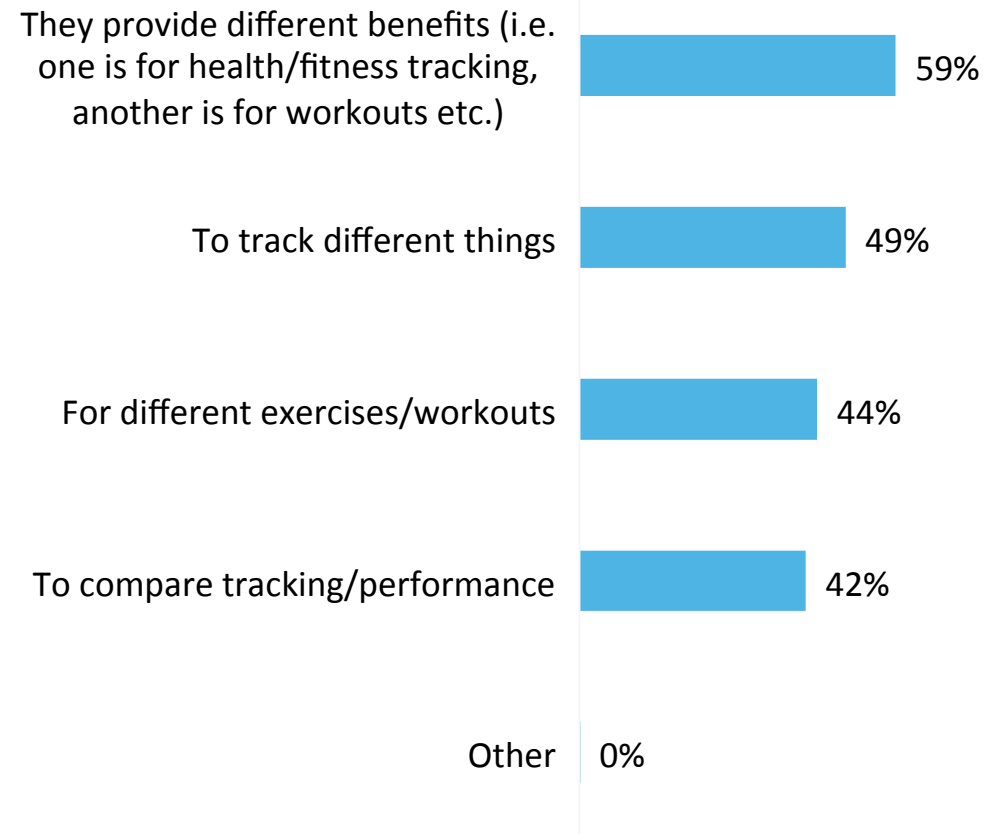
MULTIPLE APP USERS (n=419)

60% of health and fitness app users are currently using more than one app; among those 60% a majority use multiple apps for different benefits

Number of Apps Currently Using (N=700)



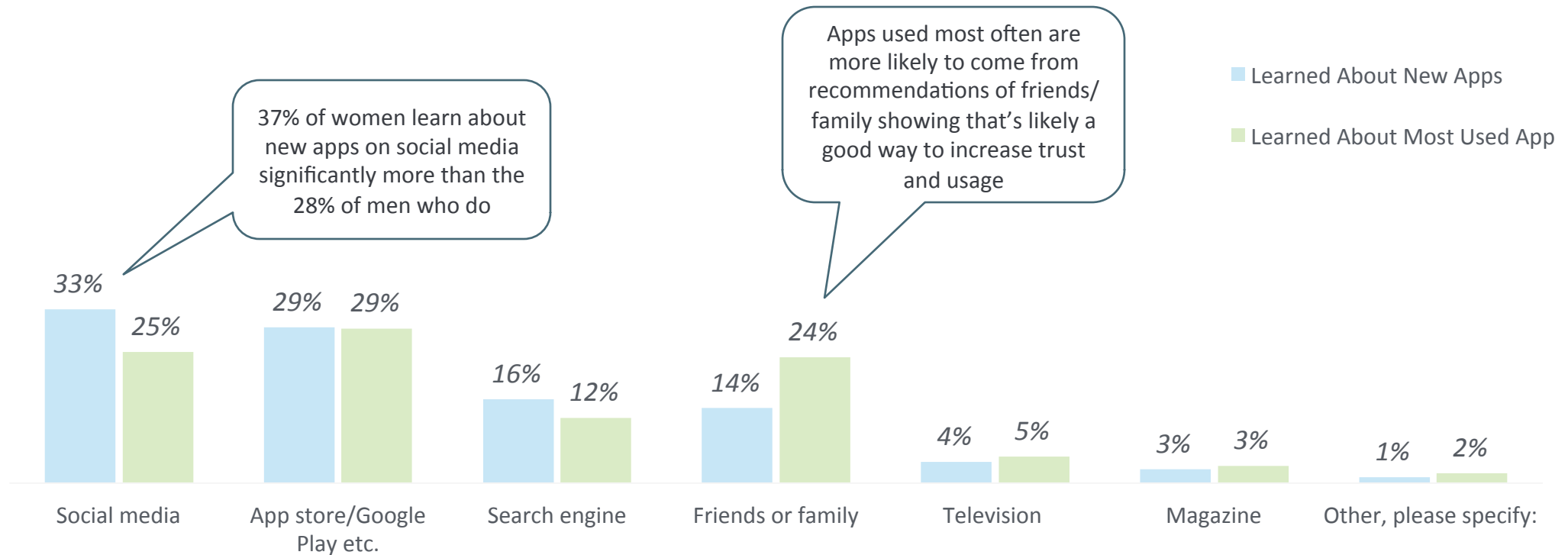
Reasons for using multiple apps (N=419)



How many health and/or fitness apps do you currently use? For what reason(s) do you use multiple health and/or fitness apps?

LEARNED ABOUT APPS (n=700)

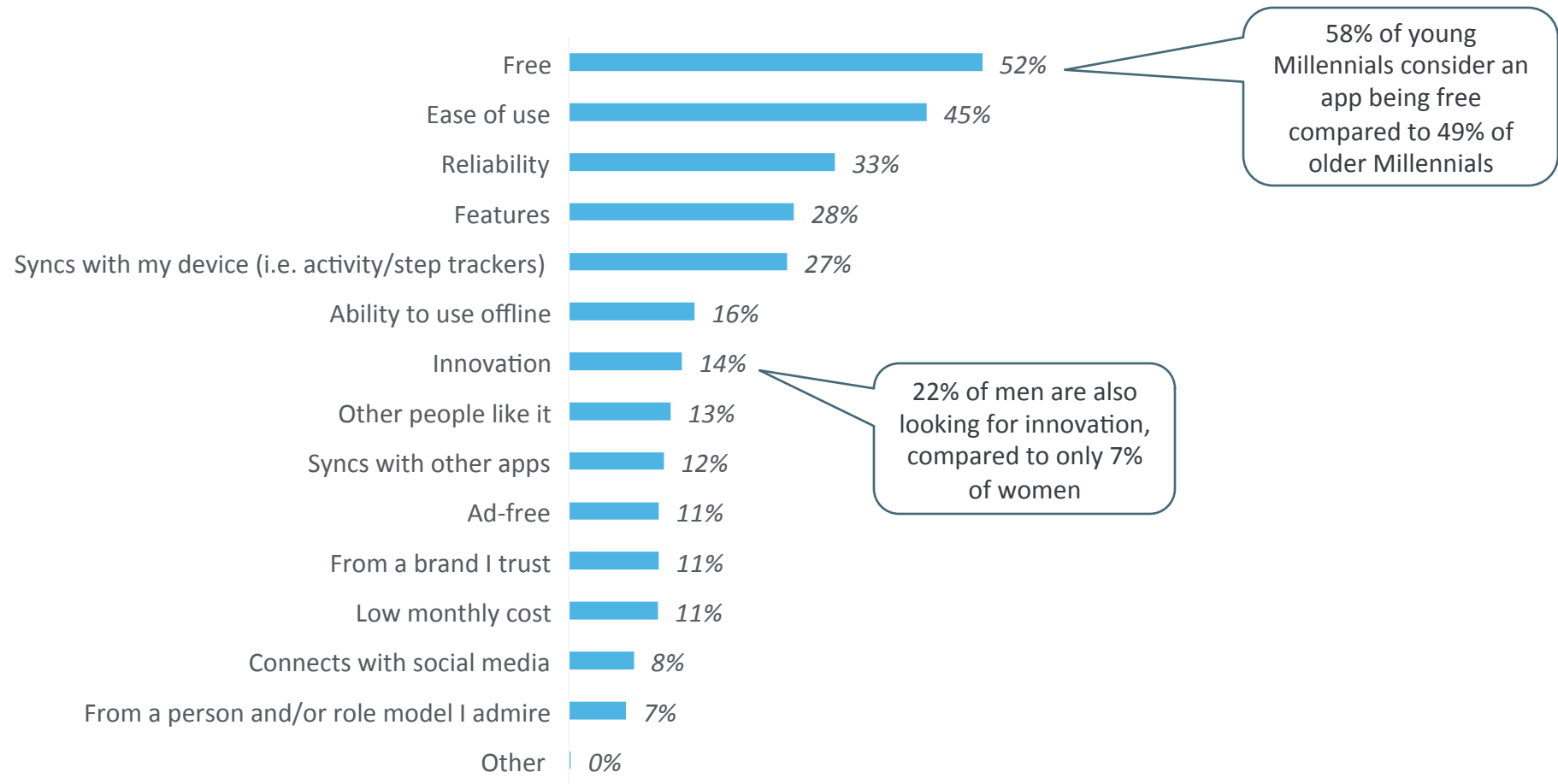
Users learn about new apps from social media and an app store, while they learned about their *most* used app from friends or family or an app store



Which of the following best describes where you look to learn about new health and/or fitness apps? Which of the following best describes where you first learned about the health and/or fitness app you use most?

USAGE CONSIDERATIONS (n=700)

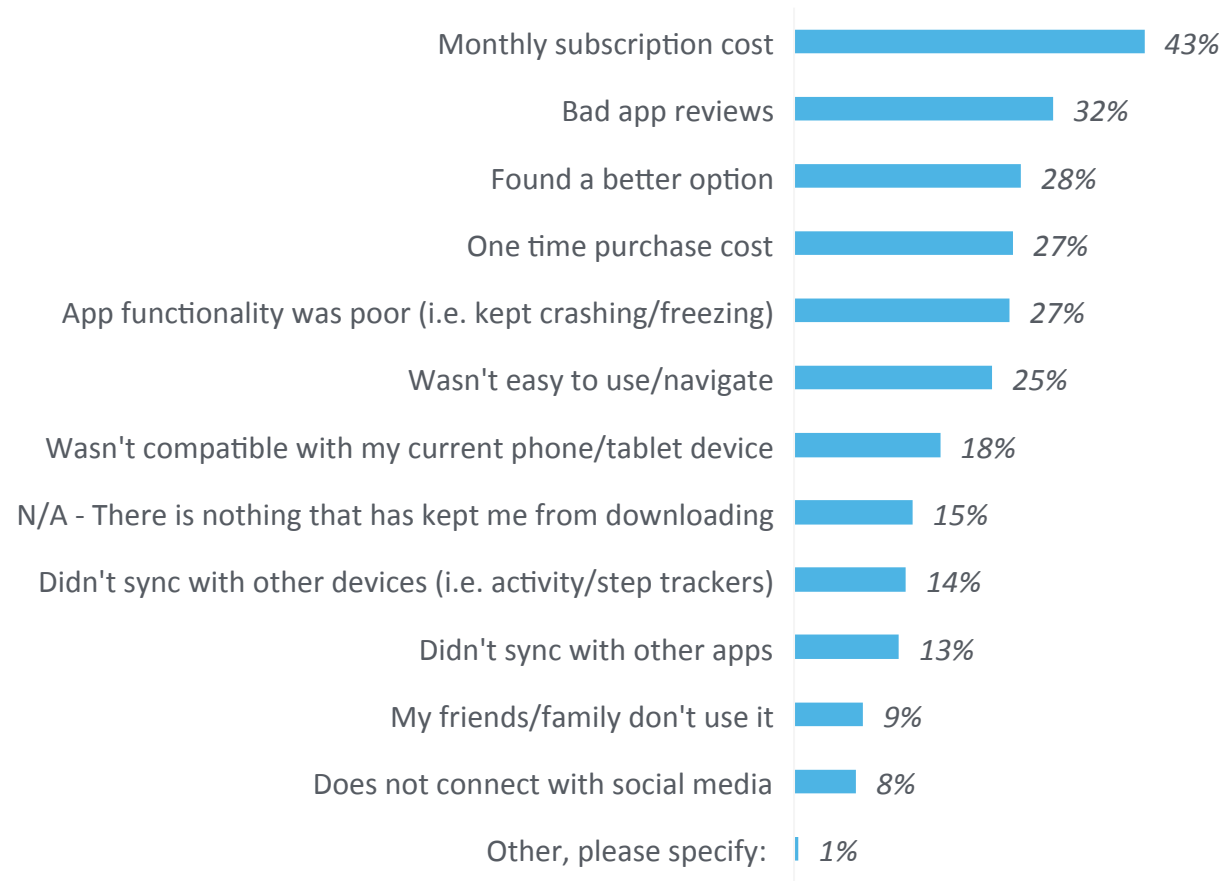
Most users are looking for a free app that's easy to use, reliable, syncs with their devices, and has the right features before trying it



Please select up to 3 attributes you consider when downloading or selecting a health and/or fitness app.

BARRIERS (n=700)

A monthly subscription cost is by far the leading barrier health and fitness apps will have to overcome

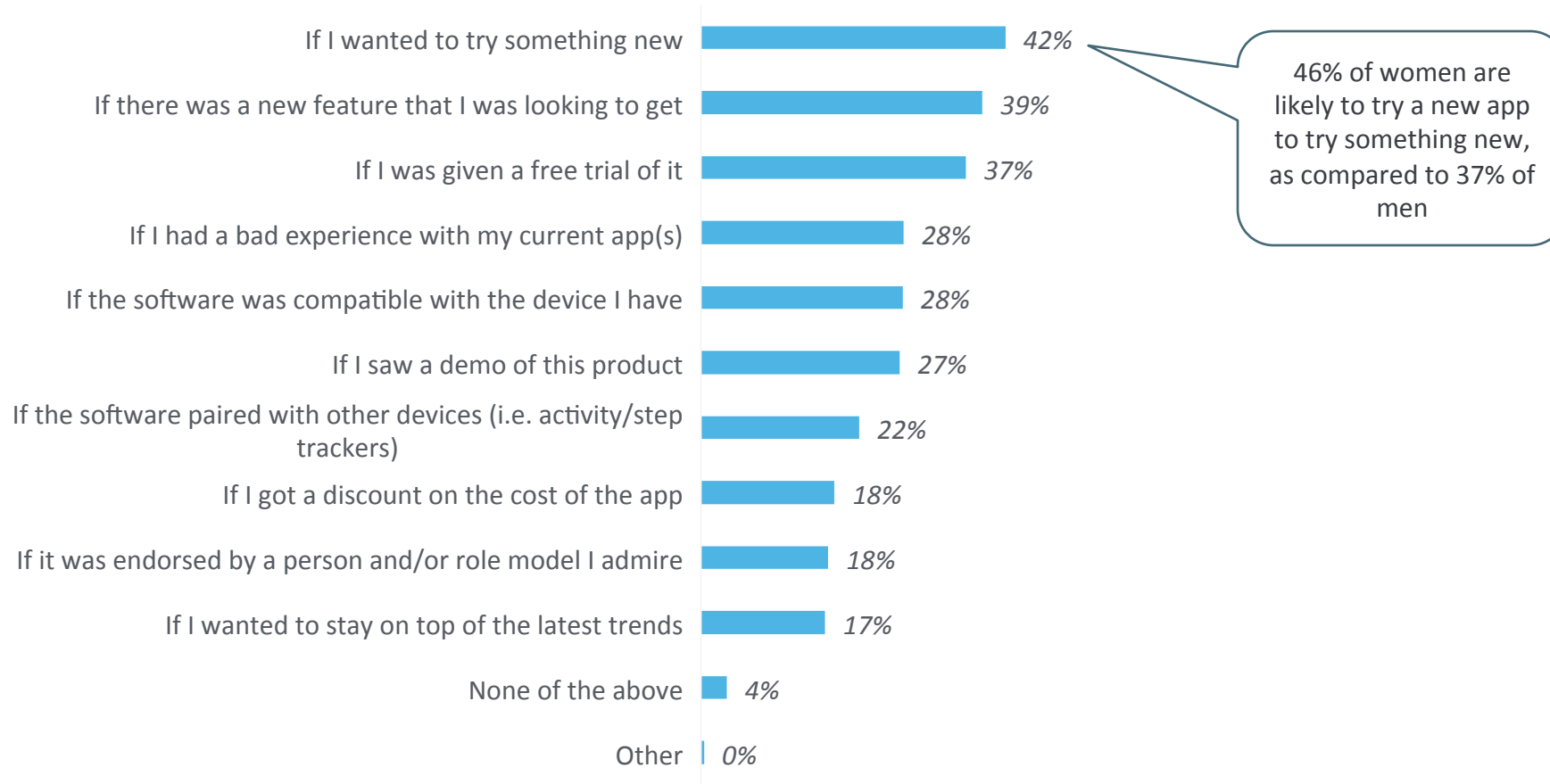


Less frequent exercisers, multiple app users, young Millennials, and women on average selected more barriers than their counterparts

Please select up to 3 attributes you consider when downloading or selecting a health and/or fitness app.

TIGGERS (n=700)

Some sort of new and/or unique feature or aspect of a health and fitness app would likely increase usage consideration

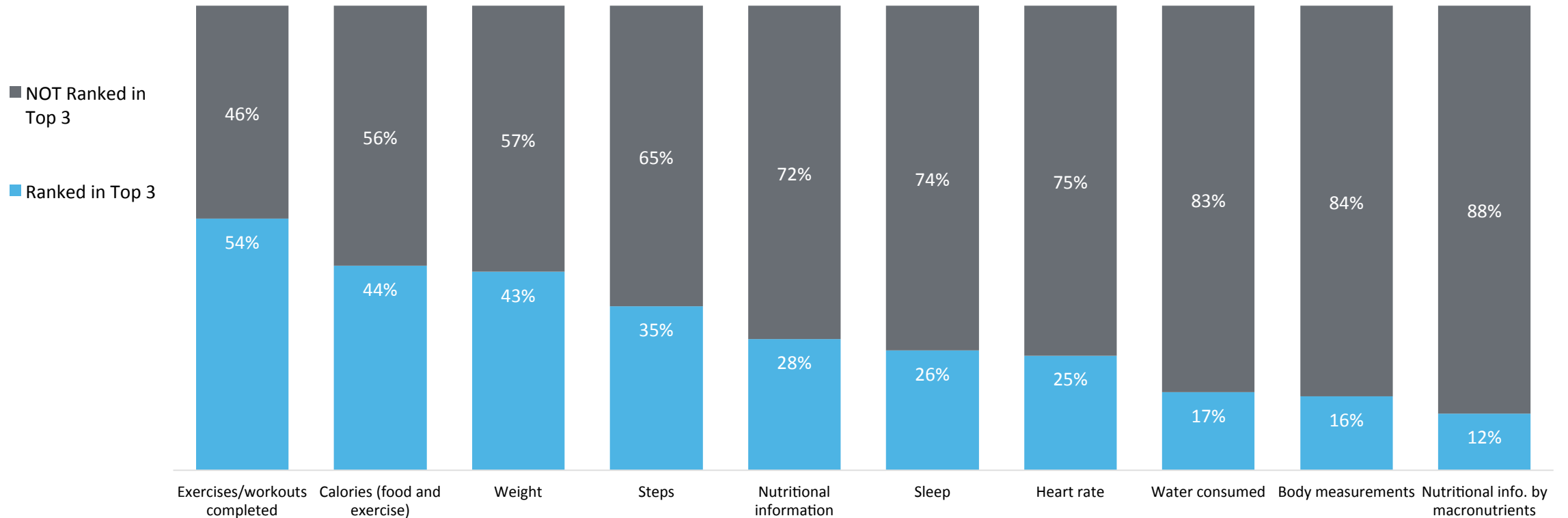


Significantly more men than women are also looking for device and app pairing compatibility

Please select up to 3 attributes you consider when downloading or selecting a health and/or fitness app.

DESIRED DATA TO BE TRACKED (n=700)

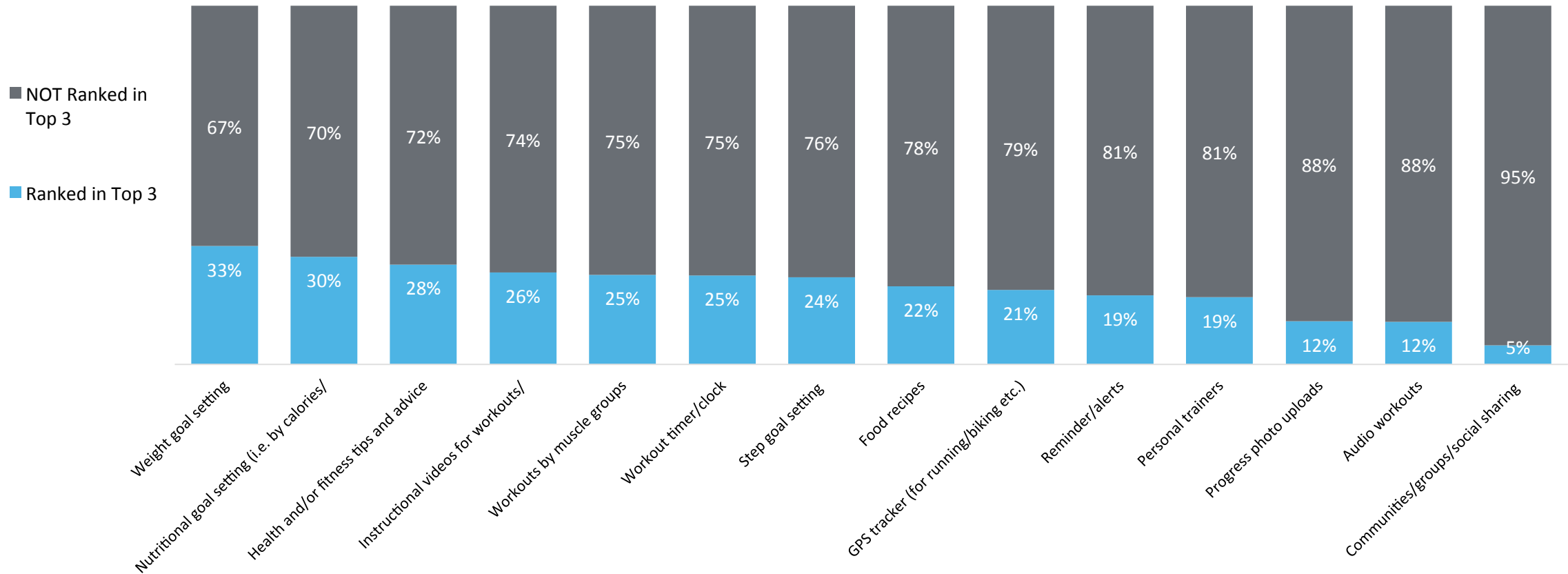
Exercise completed, the calories consumed and exerted, and weight are the top 3 most important items that should be tracked



Below is a list of attributes you may have the ability to track and/or access through a health and/or fitness app. Please rank your top 3 attributes in order of which attributes are most important to you to track or view. Rank 1 is the most important attribute, rank 2 is the second most important attribute, and rank 3 is the third most important attribute.

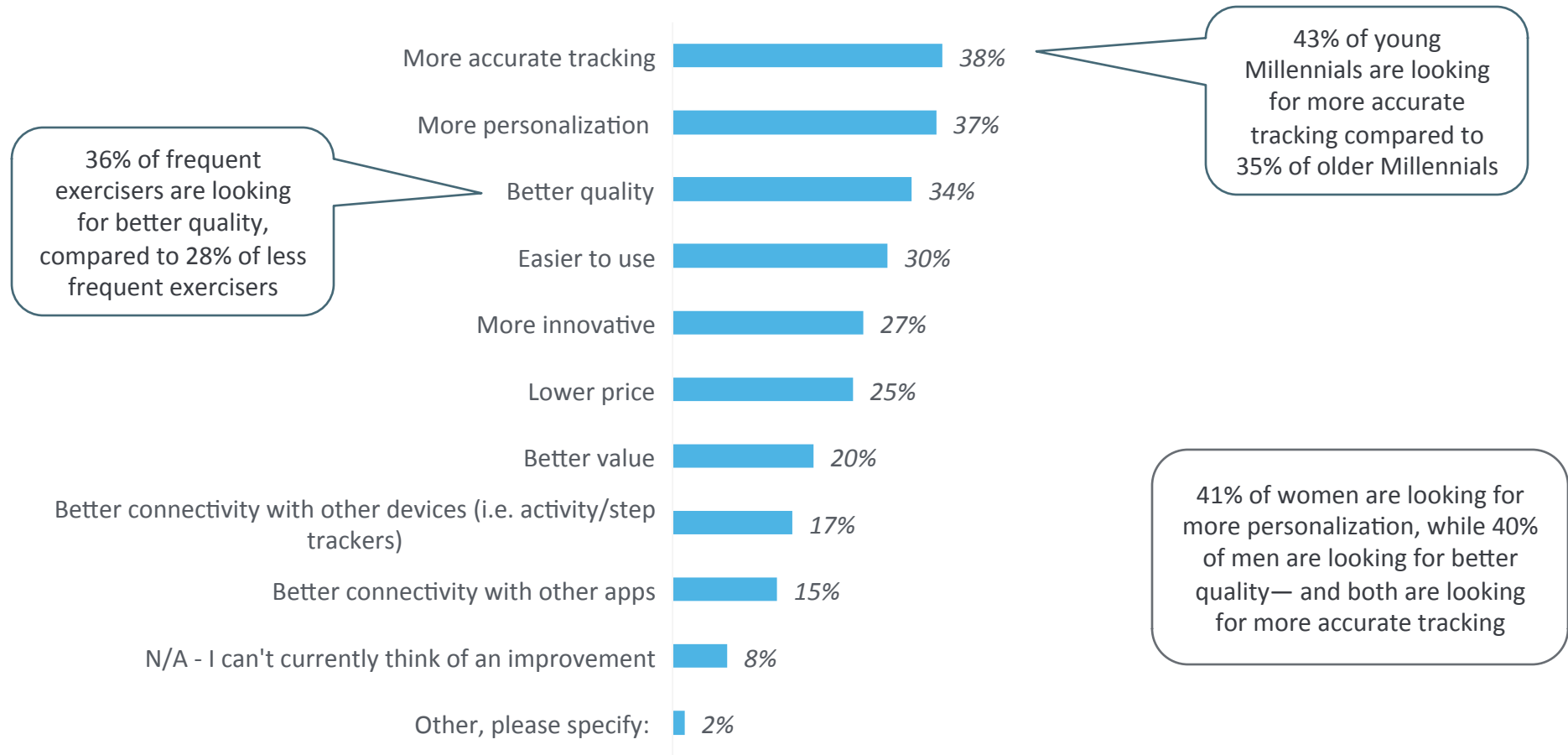
FEATURE APPEAL (n=700)

Health and fitness app users are looking for goal setting and educational content like tips, advice, or instructional videos for workouts



Below is a list of potential features a health and/or fitness app could have. Please rank your top 3 features in order of which features are most important to you in a health and/or fitness app. Rank 1 is the most important attribute, rank 2 is the second most important attribute, and rank 3 is the third most important attribute.

Health and fitness apps can improve perceptions through more accurate tracking, personalization, and better quality



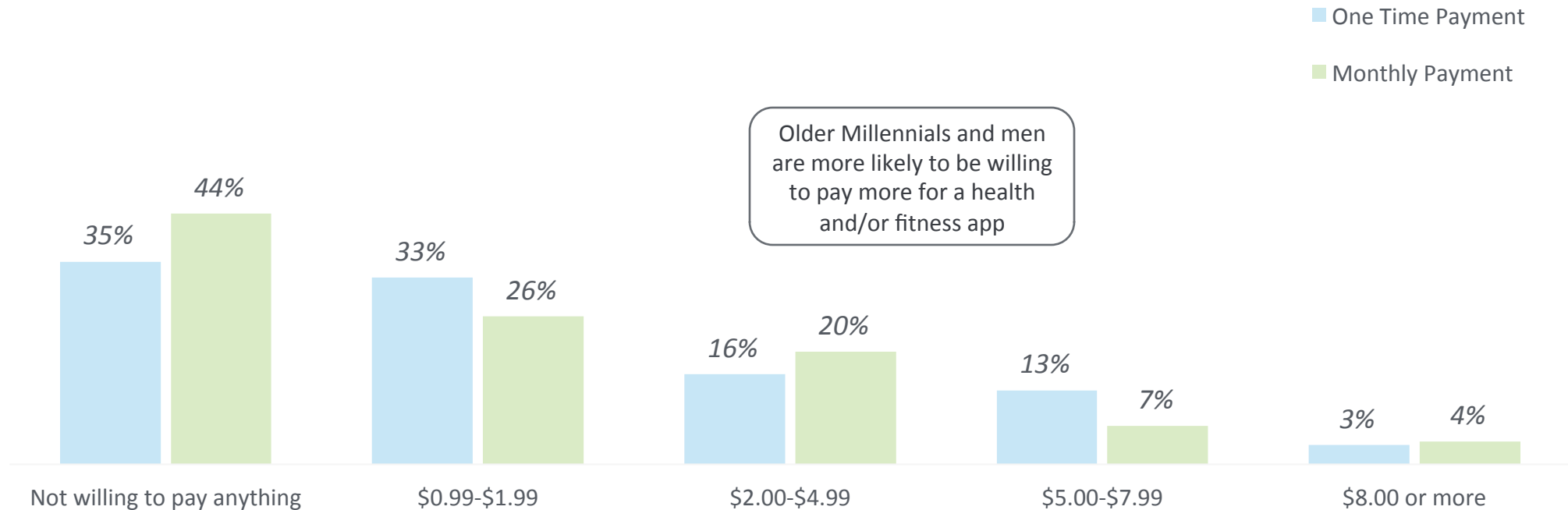
Please select up to 3 improvements, if any, that would increase your satisfaction with your current health and/or fitness app(s)?



SUPPLEMENTAL FINDINGS

PRICE (n=178)

While some of those users who are looking for a lower price aren't interested in paying anything, more than half are still willing to pay something



You mentioned that a lower price would be one improvement that could increase your satisfaction with health and/or fitness apps. When it comes to each of the situations below, how much are you willing to pay for it?

UNAIDED AWARENESS (n=700)

The top brand health and fitness app users are aware of, unaided, is MyFitnessPal, followed by Fitbit, iPhone Health, and Weight Watchers



Which health and/or fitness apps have you heard of before?

UNMET NEEDS (n=700)

Health and fitness app users are looking for a variety of things when it comes to tracking, personalization, and heart rate features



Thinking about the health and/or fitness app you use most often, what, if anything, would you like this app to be able to do/offer in the future?

APPENDIX

APPENDIX: SAMPLE DEMOGRAPHICS

Gender	
Male	47%
Female	53%

Age	
Under 13	--
13-17	--
18-24	33%
25-34	67%
35-44	--
45-54	--
55-64	--
65+	--

Children in HH	
Yes	50%
No	50%

Region	
Midwest	21%
Northeast	19%
South	38%
West	23%

Exercise	
Every day	24%
4-6 times a week	45%
1-3 times a week	31%
A few times a month	--
Never	--

APPENDIX: SAMPLE DEMOGRAPHICS

Social Media	
Facebook	91%
Instagram	73%
Twitter	50%
LinkedIn	21%
Pinterest	36%
Snapchat	58%
None of the above	--

App Types	
App for health and/or fitness	100%
App for financial tracking, budgeting, and/or online banking	66%
App for scheduling, calendars, meeting management etc.	62%
App for lists (i.e. grocery, to do, etc.)	59%
App for image editing, filtering, collages, etc.	59%
None of the above	--