

Research

Fitness app prototype

May 2019



What we're aiming at

**To develop a sustainable health
& fitness prototype program.**



01. Research

*Diving deep into the market, our user problems
& the competitive landscape to frame our
solution*

- **Industry Analysis**
- Competitor Audit
- User Research



Industry analysis approach

Enquiry questions:

- What are the current trends in the health and fitness market?
- Is the market growing or stagnant?

Activities:

1. Desktop research to understand market trends & opportunities



Industry analysis findings

\$87.2bn

Global **health club industry** market size

+6.1%

Yearly **fitness industry** revenue growth

\$6.8bn

Global **Fitness App** market size in 2018

+18.6%

Average **Fitness App** market size annual growth rate

Top 5 trends for 2019



Top 3 dropout from 2018

- Circuit weight training
- Sport specific training
- Core training

Commercial activity trackers for fitness, such as Fitbit, Polar, Apple Watch, Samsung Gear Fit, and Jawbone are increasingly popular with an estimated **172.2 million “wearable devices” purchased in 2018**. That’s an annual growth of 27.5%.

50% of users who adopt a Fitbit, abandon it within the first two weeks of use, whereas 62% of users who downloaded an activity tracking mobile app stop using it within the first two weeks or at best within six months after purchase.



01. Research

Diving deep into the market, our user problems & the competitive landscape to frame our solution

- Industry Analysis
- **Competitor Audit**
- User Research



Competitor research approach

Enquiry questions:

- What is good / bad / ugly about the leading health and fitness apps in the market?
- How to existing products attempt to solve health and fitness problems?
- Who are the direct & indirect competitors?
- Why are the top performing and stickiest apps so successful?

Activities:

1. Evaluation of 23 health & fitness apps were audited, evaluating the features, ease of use and friction points.
2. App store review analysis - Customer comments
3. Product immersion: Based on the top 10 competitors, researchers participated in each product. Testing the product by doing.



Competitor analysis findings

Entry to Market

62% of the apps were considered "Single player".

Meaning they weren't backed by either an existing device/service company or a celebrity.

40% Performance monitoring

20% Fitness program

13% General all rounder

27% Diet / Mindfulness / Weight Loss

Audience:

71% were Gender neutral

21% were Female focused

8% were Male focused

Platform:

100% of the apps are available on iOS and **16%** did not offer an Android version of their app.

Very few apps seemed to offer a web version of their programs.

Ratings:

Nike Run, MapMyRun & Runtastic lead the chart with a **4.8/5** rating

FitBit, GoogleFit & Samsung Health closed the chart with a **3.9/5** rating

Price:

100% of the apps are **free to download**.

96% of the apps offer a **free trial**

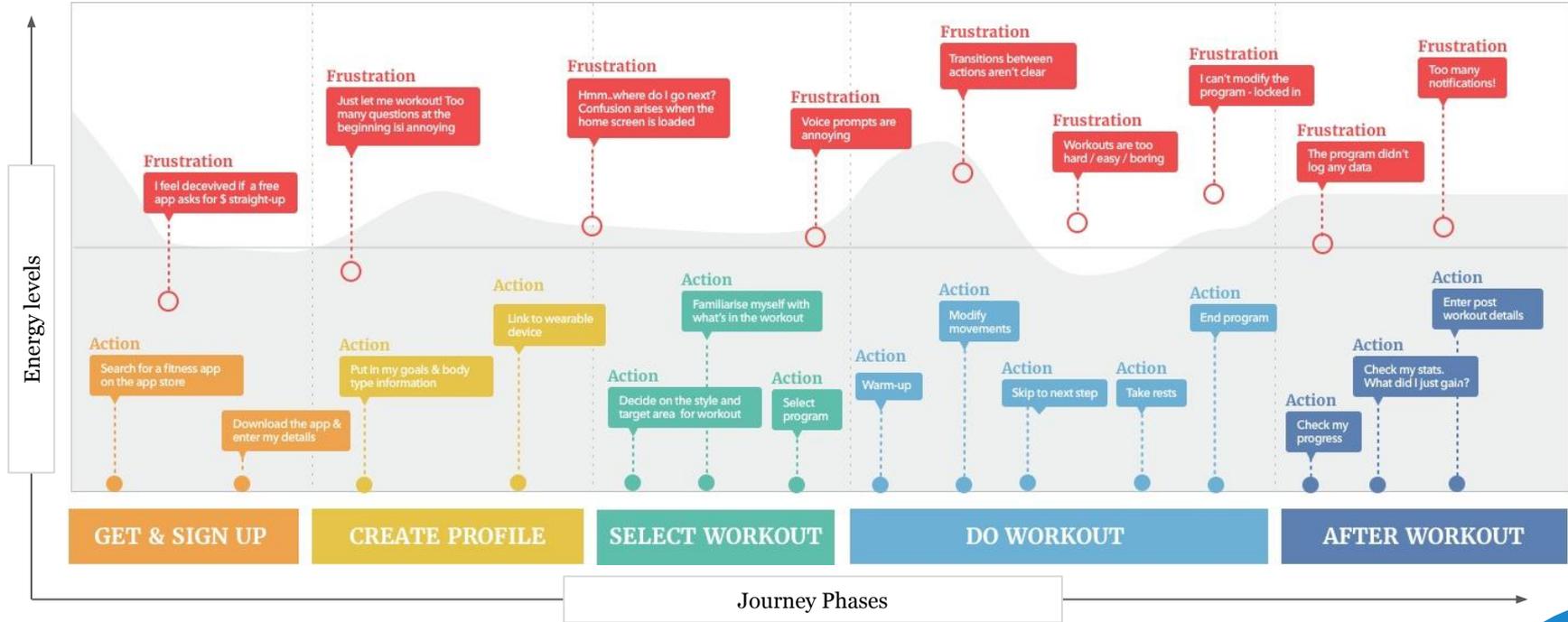
The average **monthly subscription pricing** was around the **\$15-\$20** mark.

Weight Watchers and Sam Woods were leading the chart with respective monthly subscriptions at \$96.50 and \$59.

Store ranking:

Mindfulness/Meditation apps take top 1 & 2 place on the stores for the Fitness category followed by 3 activity tracking apps.

Workout app journey map: *phases & frustrations*





01. Research

Diving deep into the market, our user problems & the competitive landscape to frame our solution

- Industry Analysis
- Competitor Audit
- **User Research**



User research approach

Enquiry questions:

- What prevents people from maintaining healthy exercise habits?
- What sustains healthy exercise habits?
- What influences motivation and how do motivation and exercise work?
- What types of exercise habits and behaviours correlate with sustained exercise routines?

Activities:

1. Review of current behavioral psychology theories of motivation and exercise
2. Review of current behavioral psychology papers on exercise technology and their influence on human movement
3. Contextual enquiry to understand preferences and behaviours.
4. User journey mapping - workout experience
5. User personas



User Research Findings

Motivation MAKERS

Motivation is dynamic & contextual

Intrinsic motivation is a greater indicator for sustained health and fitness routines

Intrinsically motivated people are more likely to adopt and retain longer term exercise habits than extrinsically motivated people.

Humans are social & relatedness can boost motivation

Relatedness & competition positively correlates to intrinsic motivational forms

If I feel connected to others therefore I keep coming back.

Motivation BREAKERS

The biggest blockers to motivation sustaining motivation are:

1. The perception of competing or higher priorities
2. Positive self perception of competence

Habits are hard to change if you aren't motivated in the RIGHT WAY

Habits of shorter 'streaks' of continued behaviour correlates with behaviour change & motivation

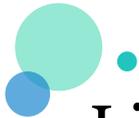
People know that exercise is good for them

Users understand health in the holistic sense of physical & mental wellbeing. But we still fail to choose the healthiest habits.



02. Key findings & Product requirements

*Bringing together our research discoveries to
frame the product characteristics*



Linking research to product features

Discovery

What the research told us.
These are the primary facts and findings learned across each of the research activities

Insight

Making meaning out of the facts and findings. What is the theme? How is this meaningful to our problem and our users?

Product Feature

What will we include as a feature to respond to this evidence-based insight



Key Product Requirements: *User*

Discovery

Intrinsic motivation is a greater indicator for sustained health and fitness routines

The perception of competing priorities and a low self perception of competence are the biggest barriers for exercise routines

Smaller, attainable and measurable goals feed motivation, build habits and user positive self perception

Users understand health in the holistic sense of physical and mental wellbeing.

Social motivation and relatedness also positively correlates with Intrinsic motivation

Insight

Users display both motivational styles along a continuum so we need to cater to both

Countering these beliefs will build more sustained habits.

Rewarding participation and habitual behaviours increases

Therefore, logging a feeling or emotional sentiment post workout is a valuable product feature to view mental state over time

Communities, sharing and competition foster sustained exercise habits

Product Requirement

Varied and flexible programs that support self-directed and app-directed preferences will balance both persona's behaviours.

Celebrate always - Positive language, goal setting and rewards build toward countering these barriers

Track habit 'streaks' a health metric

Track mental state as a health metric

Online communities, facebook groups, social media strategy need to foster this community.



Key Product Requirements: *Competitors*

Discovery

Mindfulness & meditation apps hold the top positions in app store rankings.

70% of apps surveyed were designed to be gender neutral

Free trial periods are essential and users will abandon the product if payment is requested before any experience is delivered

More than 5 steps to set up (including payments) and users will abandon the process'

Habit tracking apps have invested in understanding the behavioural economics of creating routines, finding short bursts or 'streaks' of habits stimulate greater positive engagement

Confusing instructions or superfluous content frustrates users who just want to know what to do next

Most apps provided very limited data and visualisations to track performance (some none at all)

Many apps had calories burned as a metric - but users didn't know what this equates to in a nutritional sense.

Insight

This is an emerging segment. Inspiration will be drawn from these mindfulness apps but we will not directly compete this category.

Increasingly gender neutrality is important to provide an inclusive experience for all users.

The path from download to workout must be fewer than 5, ideally 3 steps.

Free access to get a 'taste' of what the app is builds credibility.'

Take the insights from this category and introduce within the app by rewarding users on shorter streaks of repetitive activities

GIFs and linear instructions clarify expectations and guide the user better than long text or videos.

Providing some free tracking and some premium tracking is a point of differentiation.

Quantifying the calorie equivalent in terms of food may help to guide the user to understand this.

Product Requirement

Subtle elements of mindfulness in the warm up or warm down

Gender neutral designs with men and women in imagery and cultural diversity

'Express' sign up to skip straight to workout

Include a **payment free, free trial**

A streaks feature within activity monitoring rewarding users for participation

Simple, linear steps with short clips in work out activities

Tiered analytics access based on product purchased

Quantify and explain metrics the user achieves post workout



Key Product Requirements: *Industry*

Discovery

Wearables continue to dominate the market projected to grow by 27% this year.

Fitness app abandon rates are huge; 60% of users abandon within the first two weeks. Poor UX, cost and complexity contribute to this

Insight

Integrating with the most popular devices and/or having an Apple Watch app version on the market may enhance the opportunity to steal users from the stickiest app category - activity tracking.

Engaging users with habit rewards, simplicity, clarity of instructions and affordability may counter this.

Product Requirement

Wearable integration and activity tracking (such as running) to be included.

Simplicity always. User testing to iron out where things became confusing. App tutorial and onboarding emails critical.



Product requirements

Wearable integration for activity tracking

Simplicity. Always

Varied and flexible programs

Celebrate. Always - Positive language, goal setting and rewards

Track habit 'streaks'

Track mental state

Online communities

Subtle elements of mindfulness

Gender neutral designs

'Express' sign up

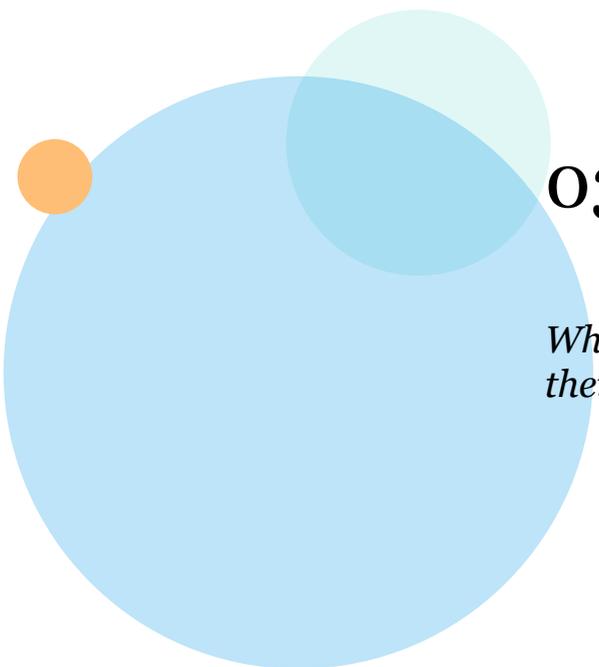
Payment free, free trial

A streaks feature within activity monitoring

Simple, linear steps with short clips

Tiered analytics access based

Quantify and explain metrics the user



03. Personas

*What we now know about our potential users,
their habits, behaviours and preferences*



Richard Melville

The Motivated Moderate



"I love to be outdoors as much as I can. I've never been a gym junkie but I do like to stay fit and healthy as much as possible. I'm a recent graduate so cash is tight so I prefer running, cycling and surfing over hitting the gym"

Mellow · Organised · Precise

Age: 22

Occupation: Copywriter

Location: Sydney · Australia

Archetype: The Motivated Moderate

Bio

Rich Melville is a 22 year old copywriter from Sydney that lives and breaths surfing. He's going on a surfing boat trip in the Mentawais 3 months from now with 5 of his best mates so wants to get in shape before then.

Goals · Interest

- Rich's goal is to start a 12 week training program on his own that will improve his overall fitness & cardio level before a surfing trip
- Rich likes to track movement activities using his Apple watch
- As a recent graduate, Rich is tight on cash so needs an affordable alternative to the gym.
- His girlfriend got him into yoga last year and he loves it but feels uncomfortable going to classes alone.

Pain Points · Concerns

- Rich's biggest pain point is competing priorities. He doesn't love a structured workout as much as he loves a surf.
- Rich has tried some apps in the past but mostly free activity tracking.
- Cost is a major factor for Rich. He's still quite early in his career and would prefer to save money for surfing holidays than a gym membership.

Scenario

Rich is going on a surfing trip on a liveboard boat in the Mentawais 3 months from now with some of his best mates so wants to get in shape before then. He's been working hard and playing harder so feels a bit sluggish. He wants to be in the best condition before he is on the board so he can surf all day.

Drivers Motivations



Workout Personality



Brands





Dani Reynolds

The Fitness Fanatic



"I travel a lot, usually alone so I spend loads of time in hotel gyms or pounding the pavement outside. Fitness is essential to my mental health and feeling in some routine - even though I'm on the road so much."

Fierce · Ambitious · Focused

Age: 30

Occupation: PR Executive

Location: Hotels around the world

Archetype: The Fitness Fanatic

Bio

Dani Reynolds is a 30 year old gun PR executive, who flies across the globe on a weekly basis for clients. When Dani is home she is F45 obsessed, she loves the community, the competitive aspect of it and how it has kept her in a muscular and toned condition.

Goals · Interest

- Dani wants to maintain her physical fitness levels while away from home without worrying what equipment is needed or how much time she has.
- Weight training is something that Dani loves because it keeps her toned.
- Performance enhancing and self-improvement is something Dani is passionate about. She's constantly testing, tweaking and monitoring her health and fitness regime.

Pain Points · Concerns

- Travelling so much means her schedule is sometimes unpredictable. Dani needs flexibility and a workout program that works around her busy schedule.
- The duration of workouts is an important factor when deciding what to do.
- Dani already has great technique and form so wants to run solo on customising her programs and tracking her performance.

Scenario

I'm currently managing an event in Hamilton Island. The hotel has some equipment but I'd prefer to get outside while I can because the rest of the day I'm inside the hotel. I have about 30 - 40 minutes to squeeze in a session at 5:30am before the day turns into chaos.

Drivers Motivations



Workout Personality



Brands





"My exercise habits have always been in a bit of a state of flux. I start a good routine for 6 months then something changes and I drop off for 6 months. I'd love to keep the routine I've got going on right now because I've seen how much better I feel doing consistent exercise"

Kind · Creative · Entrepreneurial

Age: 29

Occupation: Business Student

Location: Marickville · NSW

Archetype: The Newbie

Bio

Caroline Marks owns a medium size online indoor plant business that she operates from her home office. She used to regularly go to the gym for group training but she wants to experiment with working out from home so she can fit it within her unpredictable schedule and save some money.

Goals · Interest

- Caroline just wants to keep her current fitness regime, but doing it alone.
- Her business is just taking off so she doesn't have the time to get to the gym, working out from home or around her home is the best option for her at the moment.
- Giving this a go alone is the next challenge for Caroline but she needs a little bit of TLC on the way.

Pain Points · Concerns

- While she has some workout confidence, she battles with feeling like a bit of a failure if she can't meet her goals.
- She's come along way in the past year and has created a great routine but worries she might not be able to do it alone.
- Caroline also has pretty good technique and a base understanding of how to do the exercises without putting herself at risk of injury.

Scenario

It's 4:30 and Caroline has an hour set aside to get some exercise done. She has a yoga mat and some weights to use on her deck at home but is on the hunt for a core workout to do after a 3.5km run.

Drivers Motivations



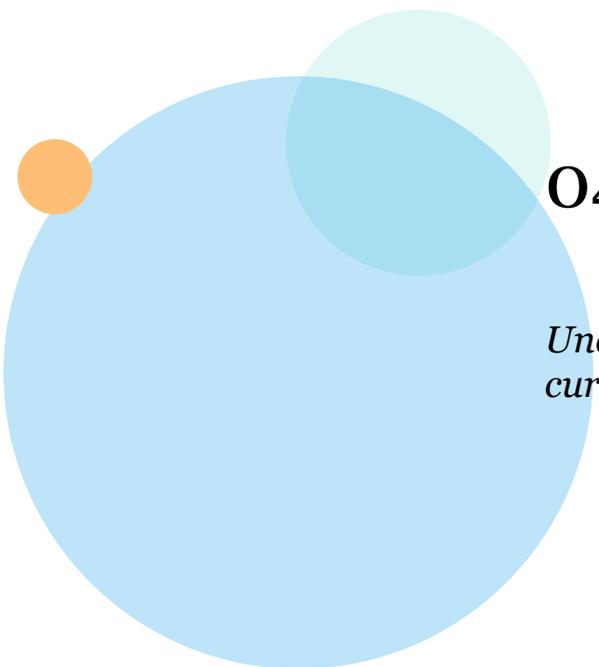
Workout Personality



Brands

IQUIT SUGAR
with Sarah Wilson





04. User Journey Map

Understanding how each persona experiences current exercise products



GET & SIGN UP

CREATE PROFILE

SELECT WORKOUT

DO WORKOUT

AFTER WORKOUT

DANI

- long, glitchy sign-up processes dissuaded me
- Allow me to later add more to my profile, goals and information
- It's sometimes a little confusing to transition from profile completion to workout selection. It's not always clear what to do
- I tend to get lost at the dashboard/home navigating to the program
- If I can't play my own music during the workout, it's a big no-no for me
- I need to be able to keep track of my reps and the timer! I can't progress without it
- When I used training cards with my personal trainers, I'd simply rank the session with a smiley face. I need to be able to track my sessions and see progress

CAROLINE

- Social sign up makes things much easier, if given the option I'll always choose to sign up via social
- It's off putting when the profiling questions are only about weight loss / body image - health is broader than that
- More than five steps and I get bored
- It's not clear during the selection process what I've been signed up to sometimes it creates a program, sometimes just sets up a profile. I felt unsure of what to do next.
- When there isn't an overview, at the beginning I'm less inclined to 'fly blind' into the program.
- How do I know what's next? I need to know what's happening now, what's up next and for HOW LONG?
- I don't like not knowing how much more there is to complete and what I've already achieved.
- I don't like it when the work out just ends - where is the summary of what I just worked through.
- A little tap on the back at the end of a workout isn't too much to ask for

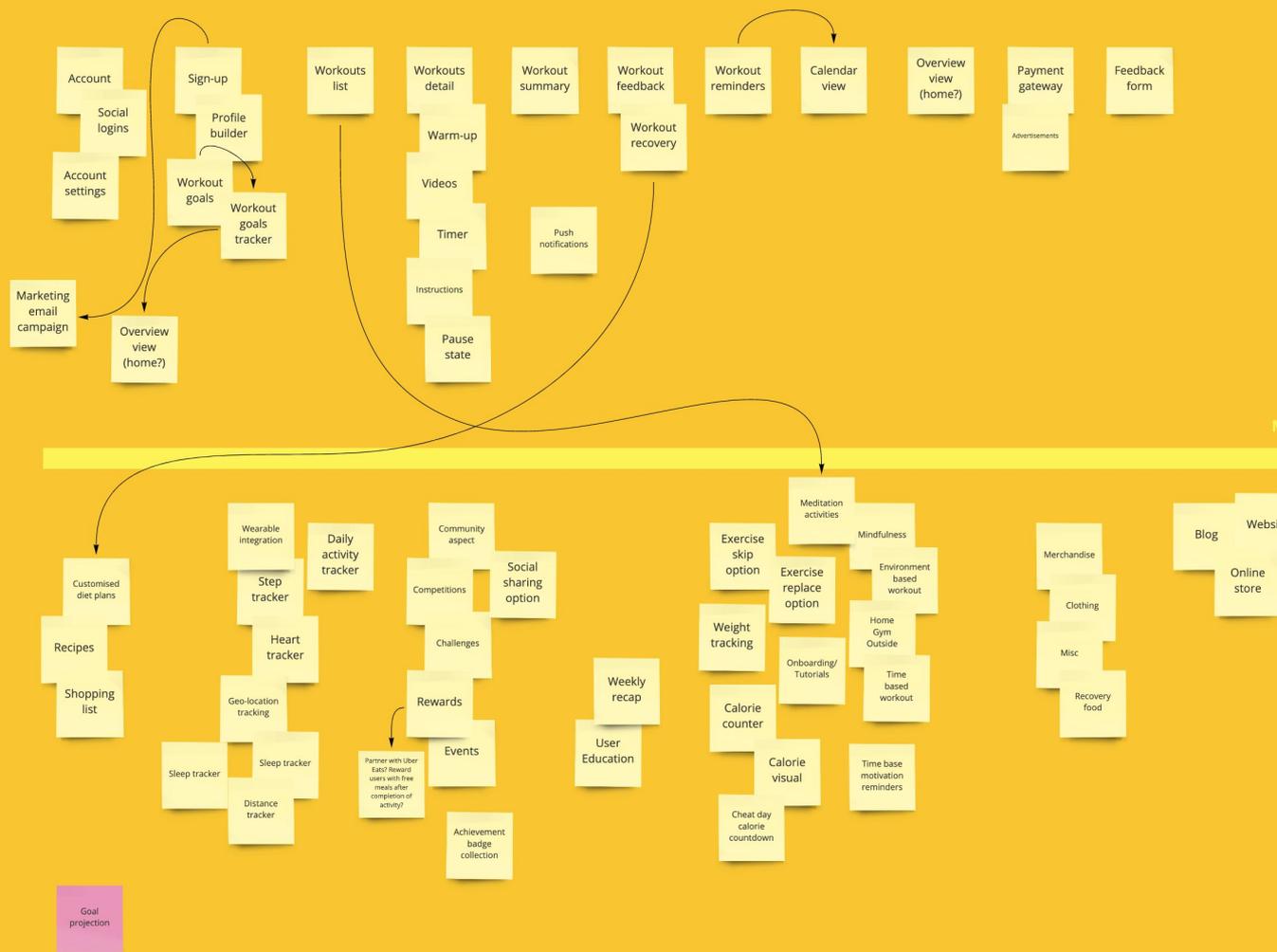
RICH

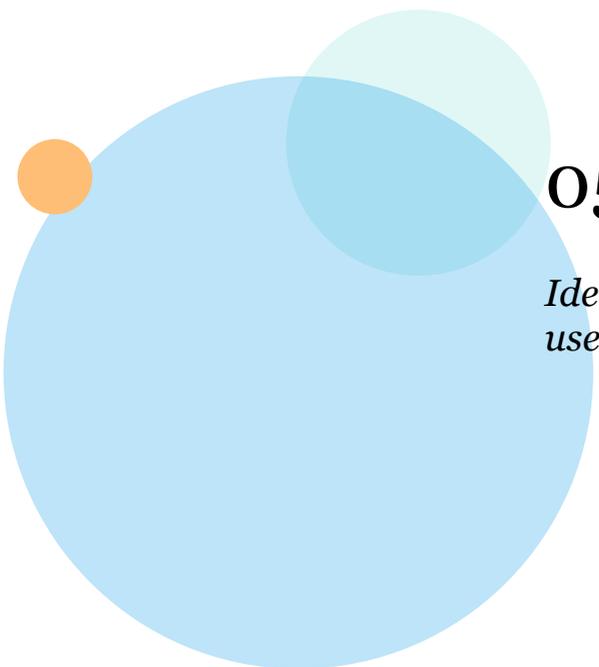
- Users feel jipped when the download a free app only to discover there isn't any free content to use the app.
- I don't like it when I'm being asked loads of questions but I'm not clear why?
- You've lost me after five steps to set up
- I get annoyed, if after entering all my profile information, I don't receive a recommended program - what was the point?
- Why can't I filter workout options by time? It's a key decision factor for me
- Ads during the workout? Are you joking? I can't stand that.
- I'm not holding my phone when I'm doing the exercises so I need to be able to see it. Some of the font's are tiny
- I can't keep track what I did, or how I felt during the last session/s. It's motivating to see it in 'real time'
- How do I know what's next? I need to know what's happening now, what's up next and for HOW LONG?
- I don't like it when the work out just ends - where is the summary of what I just worked through.
- What am I supposed to do now? How did I do compared to last time? When is my next workout?



Feature list

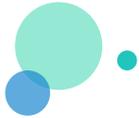
(in progress)





05. Solution options

Ideas to solve the problem statement in line with user needs and product requirements



1

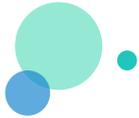
“The ultimate **fitness companion app** which provides **tailored workout programs and recovery meal recommendations to keep active and stay healthy every day** and delivers **day to day fitness tracking at home or on the go**”

2

“The ultimate **fitness motivation app** which provides **personalised fitness workout programs that match your motivation style** and **helps you build a routine of positive, life changing habits anywhere, anytime**”

3

“The ultimate **fitness program builder** which **provides personalised exercises & fitness tracking** and delivers **the quickest way to get you moving and motivated at any given time**”



Concept #1 - *Holistic app better than the competition*

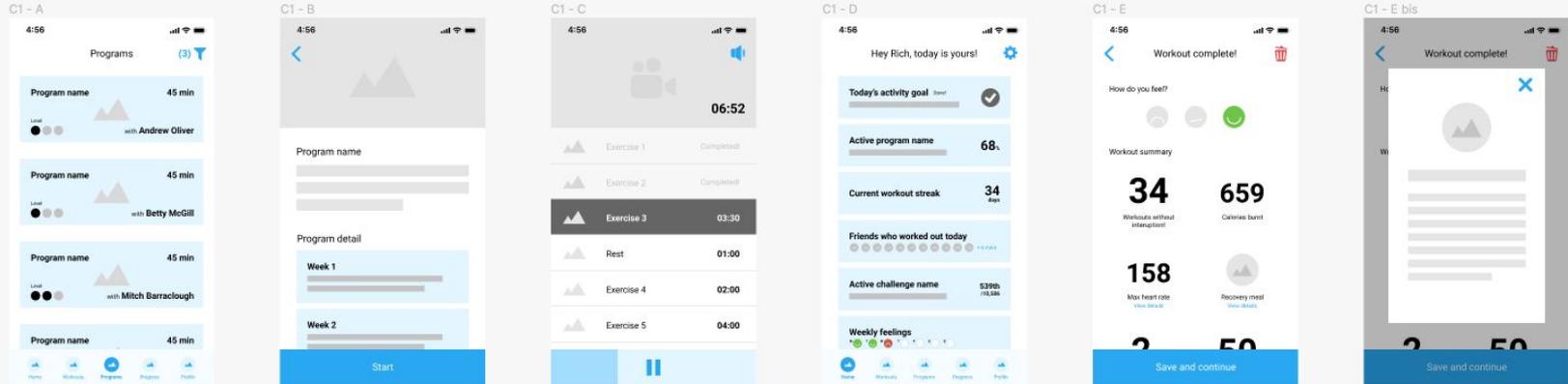


Targets: *All personas*

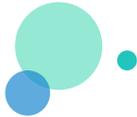
Value Prop	<p><i>"The ultimate fitness companion app which provides tailored workout programs and recovery meal recommendations to keep active and stay healthy every day and delivers day to day fitness tracking at home or on the go"</i></p>
Needs it responds to	<ol style="list-style-type: none">1. Adaptive programs - I need a personalised program that works for my schedule2. Many apps for 1 goal - I need tracking and workouts in 1 place3. Clunky experience - I need a better experience using the tech
Problems it solves	<ol style="list-style-type: none">1. A holistic affordable exercise app rather than several apps2. The right activity, based on what I want - FLEXIBILITY over RIGID programs3. Varied activity options
Value it gives	<ul style="list-style-type: none">• Better UX• Adapts to environment and context (equipment, environment, feeling that day)
Strengths	<ul style="list-style-type: none">• Suitable for beginner, moderates and advanced users• Targets already motivated users exploring a different platform• Strength in simplicity and usability of design rather than a promising performance enhancement or body transformation• Learn from failings of competitors and do better as a late entrant
Weaknesses	<ul style="list-style-type: none">• Strong competition - Similar value prop in already saturated market - not reinventing but iterating on existing products• Broad target market - To steal from incumbents with similar offer might be a big task.

Concept #1 - *Holistic app better than the competition*

Concept 1 - All rounder



[Concept wireframe link](#)



Concept #2 - *Tackling motivational blockers*

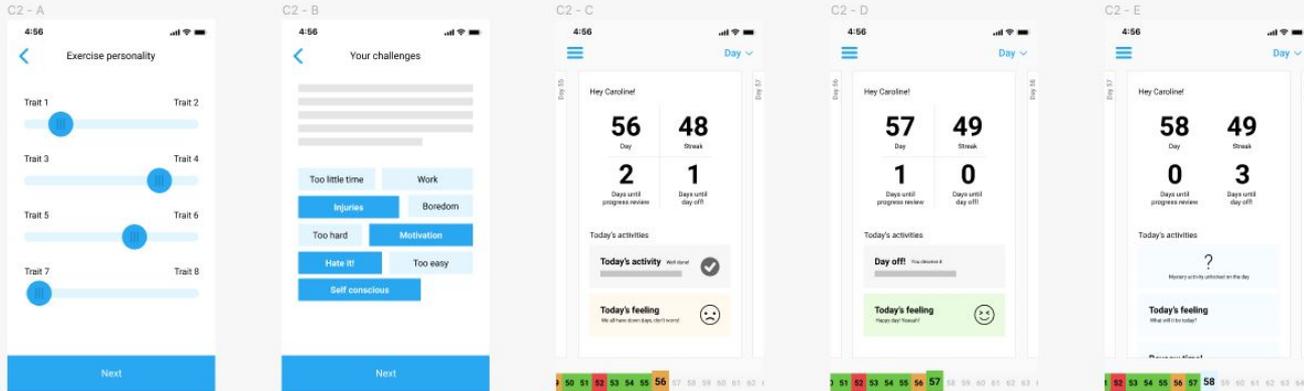


Targets: *Caroline*

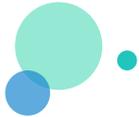
Value Prop	<p><i>"The ultimate fitness motivation app which provides personalised fitness workout programs that match your motivation style and helps you build a routine of positive, life changing habits anywhere, anytime"</i></p>
Needs it responds to	<ol style="list-style-type: none">1. Lack of Motivation - I need to stay motivated to keep exercising2. Low Self Perception - I need a personalised way to do things that I enjoy3. Lack of Knowledge - I need to know more about why I often 'fail' to keep a routine
Problems it solves	<ol style="list-style-type: none">1. Inconsistent exercise habits where users have tried and 'failed'2. Users having extrinsic drivers but can't find the 'sweet' spot for long lasting habits3. Low exercise self esteem - reward and positivity to build self belief
Value it gives	<ul style="list-style-type: none">• Longer term sustained exercise habits• Educate users about their motivational style and barriers help form better habits• Build more positive self perception about exercise abilities for longer lasting behavior change
Strengths	<ul style="list-style-type: none">• Distinct problem area common amongst beginners who fail to form consistent habits• Draws on behavioral theory and research already done about motivational styles and sustained activity• Unique segment of the market based on our research
Weaknesses	<ul style="list-style-type: none">• More experimental solution - draws on habit tracking app category and fitness apps

Concept #2 - Tackling motivational blockers

Concept 2 - Motivation maker



[Concept wireframe link](#)



Concept #3 - *Fast fitness to mix it up*

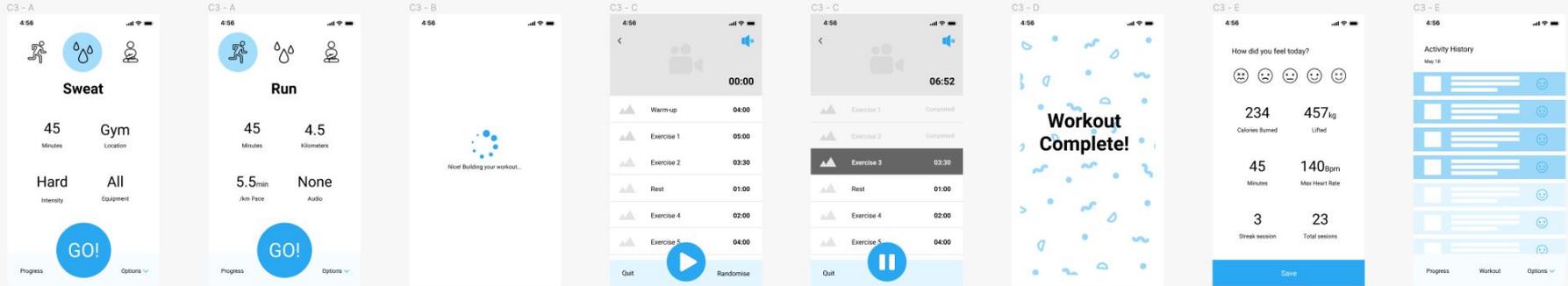


Targets: *Dani*

Value Prop	<i>"The ultimate fitness program builder which provides personalised exercises & fitness tracking and delivers the quickest way to get you moving and motivated, anytime"</i>
Needs it responds to	<ol style="list-style-type: none">1. Urgency - I need an exercise activity NOW that fits in my environment & preferences2. Boredom - I need variance to keep it interesting3. Many apps for 1 goal - I need tracking and workouts in 1 place
Problems it solves	<ol style="list-style-type: none">1. Users looking for variation in their activity at the gym or on the go2. Already motivated people who are less interested in goal attainment or habit formation.3. Long setup times for downloading, paying and using a new app
Value it gives	<ul style="list-style-type: none">• Better UX• Adapts to environment and context (equipment, environment, feeling that day)• Fast programming and interesting combinations of activities
Strengths	<ul style="list-style-type: none">• Targets already motivated users exploring a different platform - a large portion of the existing market is fanatics• Specific user trigger point - I need guidance now to keep it interesting.
Weaknesses	<ul style="list-style-type: none">• Strong competition - 'Me too' value prop in already saturated market e.g the 7 minute workout or• Broad target market - To steal from incumbents with similar offer might be a difficult ask.

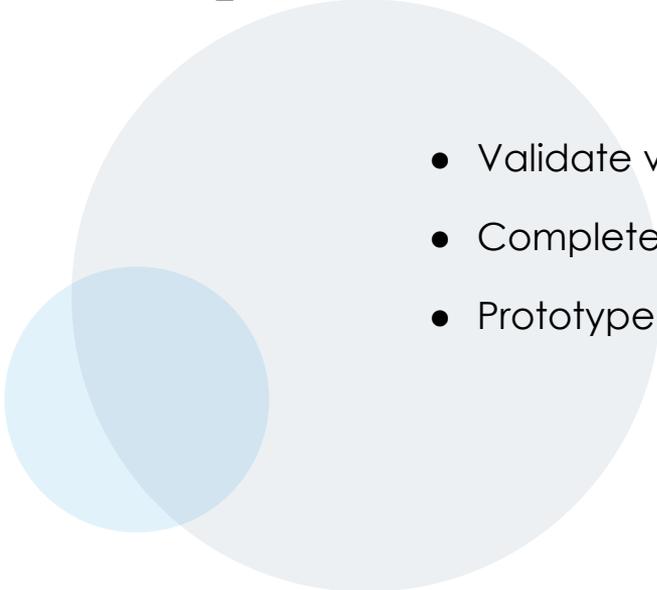
Concept #3 - *Fast fitness to mix it up*

Concept 3 - Program builder



[Concept wireframe link](#)

Next steps

- 
- Validate value prop
 - Complete wireframes
 - Prototype



Current behavioral psychology: *Self-Determination Theory*

Motivation

Motivation is contextual and dynamic.

Motivational style positively relates to sustained engagement. May be a explainer for why the top apps on the market are activity tracking - these assume a base level of INTRINSIC motivation.

Extrinsic motivation is to doing an activity to gain some outcome separable from the activity e.g *I engage in pie eating contest to win 10k, I'm not doing it because I love to eat pies, I want the 10k.* Can also be to avoid disapproval, they are extrinsically motivated.

Intrinsic Motivation is doing something for the love of it. When intrinsically motivated the person experiences feelings of enjoyment.

Intrinsically motivated people more likely to adopt and retain longer term exercise habits than extrinsically motivated people.

Key motivational blockers are:

- 1) Competing priorities
- 2) Perceived competence

Self-perception

Self-perception and perceived competence in abilities to complete physical activity positively predict participation rates. That is, if you think you're not able, good or 'that' type the likelihood you'll quit increases.

Autonomy

To encourage autonomous motivation, the app must accurately portray the value associated with participation to reach a goal.

To feed both motivational styles (Extrinsic / Intrinsic) solutions must give choices that support self-directed and app-directed options.

Reward & Relatedness

Repetition and reward are closely related: Dopamine motivates us to repeat actions to achieve that great feeling.

Provide constructive feedback is KEY - shows changes in motivation and/or self-efficacy through user-defined ratings and questionnaires.

Relatedness also positively relates to intrinsic motivational forms, if I feel connected to others, I keep coming back.