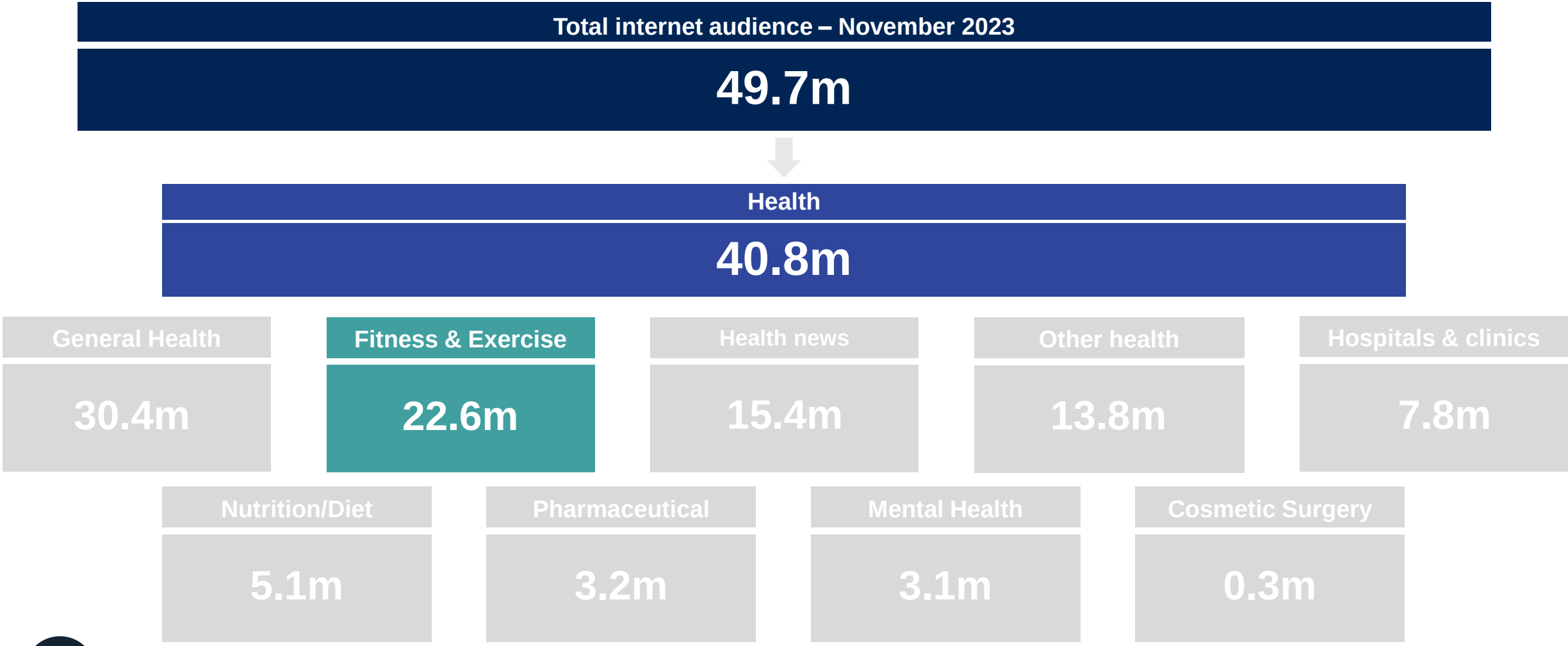
Ipsos iris: Fitness & Exercise

January 2024

Ipsos iris
The UK industry standard for
online audience measurement

Fitness & Exercise brands reach over 22 million people a month



Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

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Key objectives

1 OPPORTUNITY SIZING

Understand the seasonality of the fitness & exercise category and how this can inform content planning and marketing.

2 AUDIENCE PROFILE

Understand the different profiles and needs of the audience across fitness & exercise and how this will impact targeting and messaging.

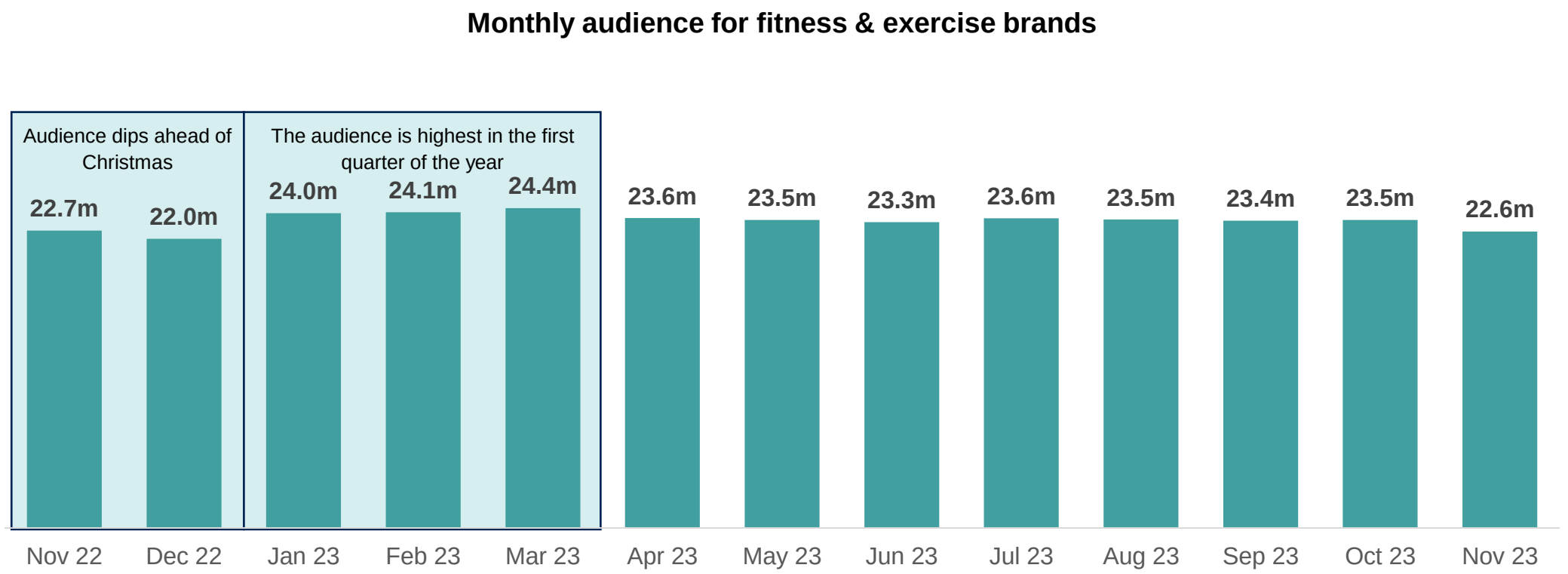
3 ADVERTISING & PARTNERSHIPS

Understand the best media and brand partnerships to deliver reach and drive growth.

OPPORTUNITY SIZING

01

The audience for Fitness & Exercise peaked in March 2023



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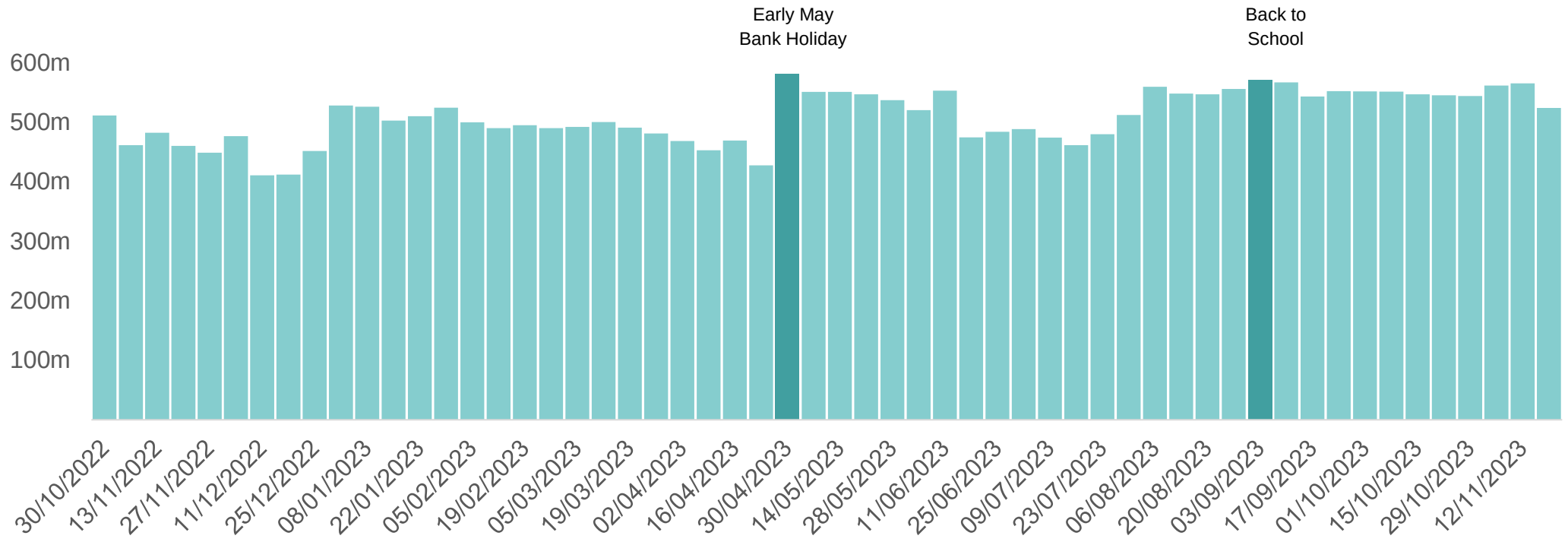
Engagement with Fitness & Exercise brands peaked during the first Bank Holiday weekend in May

Similar to audience, time spent dips in December, before surging in January. However, time spent actually peaks in May. Knowing when this audience is spending more time on exercise and fitness content means you can target them at the right times.

Weekly change in time spent on fitness & exercise websites and apps



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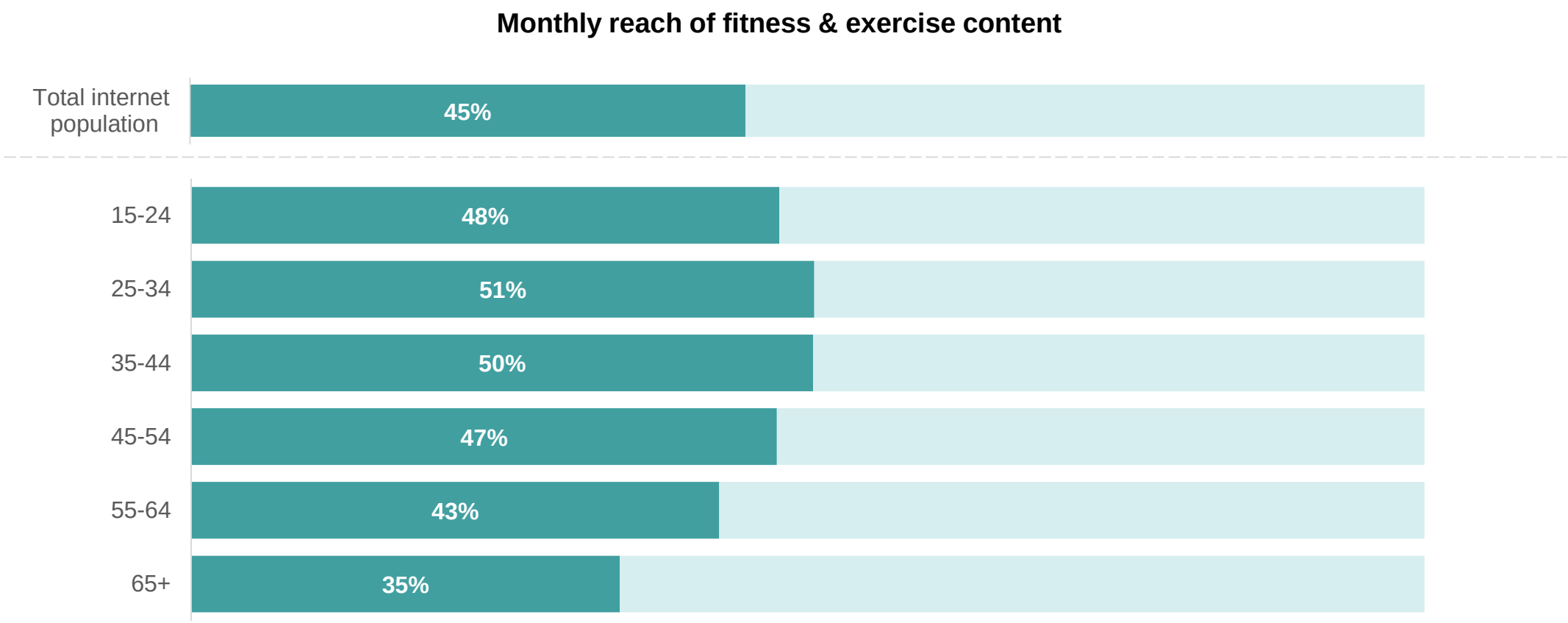
Source: Ipsos iris Online Audience Measurement Service, October 2022 - November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

Fitness & Exercise has the greatest reach among internet users aged 25-34

People aged 25-44 are a key demographic in the fitness & exercise category, but can more be done to engage older demographics?



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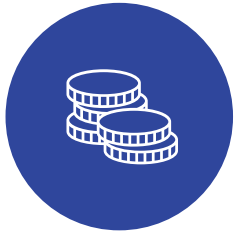
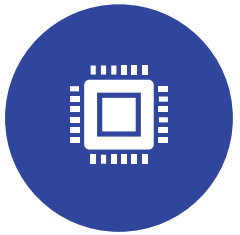
AUDIENCE PROFILE

02

Fitness & Exercise visitors are more likely to be millennial and female

Fitness & exercise visitors skew younger and are more likely to be heavy visitors of the tech and career categories. How does this impact how and where you reach this audience?

	Audience Composition				
	Female	Aged 25-44	ABC1	Heavy technology visitors	Heavy career visitors
					
Fitness & Exercise	**54%**	**38%**	**66%**	**29%**	**16%**
Total internet users	51%	34%	63%	24%	13%

Heavy users are defined as people in the top two deciles for time spent on that category
Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

Fitbit reaches one in five fitness and exercise visitors

Fitbit is the biggest brand in the category, followed by Samsung. New fintech exercise apps like Sweatcoin have also grown a sizeable audience.

Top 10 fitness & exercise brands – Monthly audience

1 Fitbit **4.5m**

2 Samsung Health **2.9m**

3 Sweatcoin **2.9m**

4 Strava **2.8m**

5 MyFitnessPal **2.5m**

6 Garmin Connect **1.9m**

7 PureGym **1.3m**

8 Apple Fitness+ **1.2m**

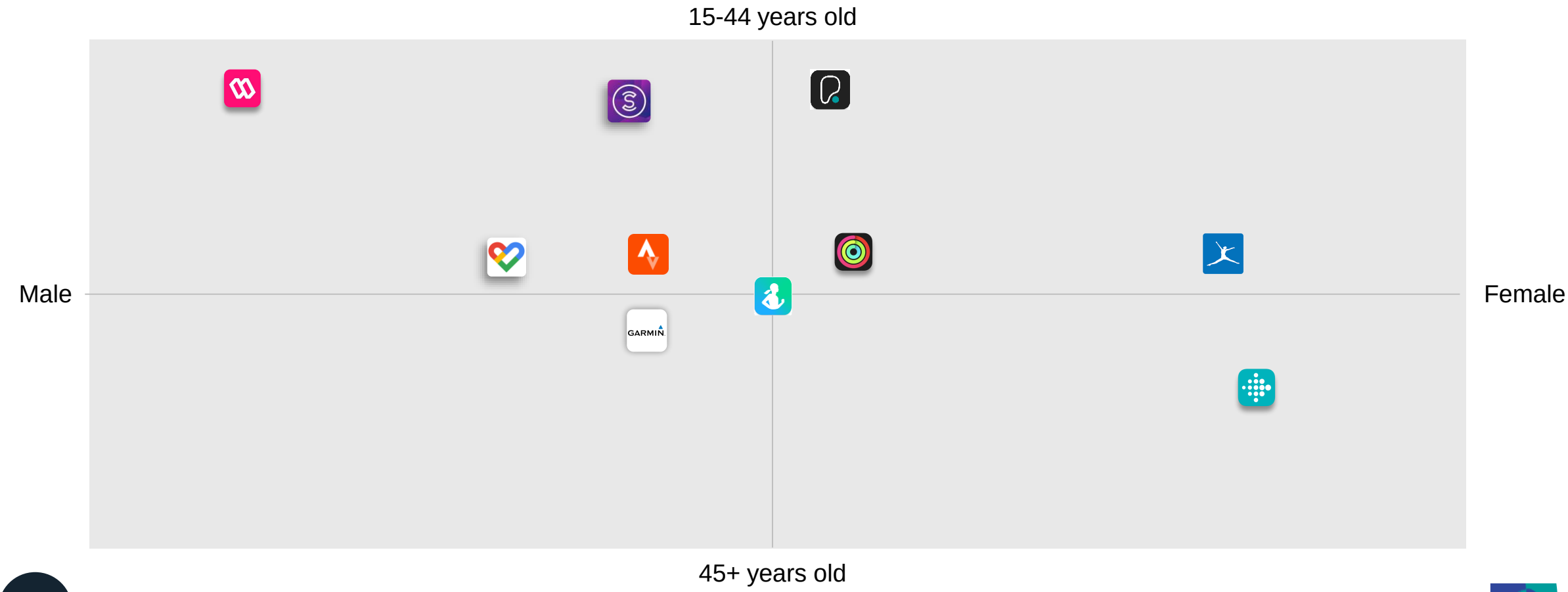
9 Google Fit **1.2m**

10 Sweat Wallet **1.0m**

Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

The top fitness brands attract a younger audience

While most fitness apps skew younger, Fitbit stands out with an older demographic. Is there an opportunity for more brands to engage older audiences?



Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

We’re going to look at three categories, which all feature in the top 10: fitness trackers, fintech trackers and gyms

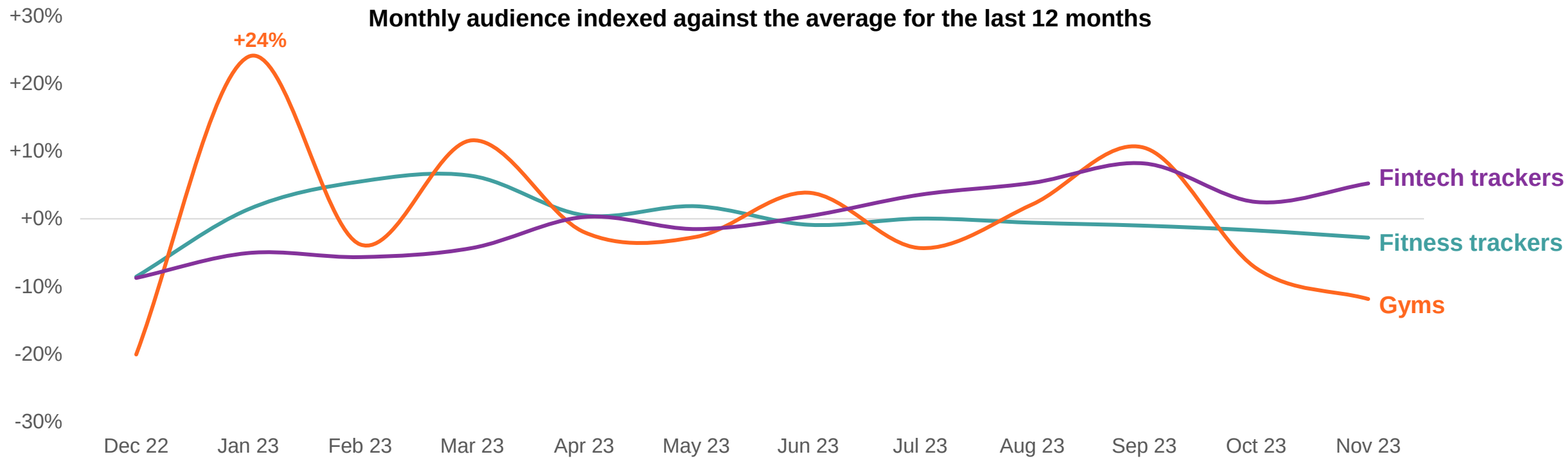
We’ve separated fitness trackers that focus on a financial incentive -- i.e. fintech tracker -- from other fitness trackers

Top 10 fitness & exercise brands – Monthly audience

Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

The online audience for gyms fluctuates more than fitness trackers, while fintech trackers are steadily growing.

The audience for gym brands was 24% higher in January 2023 versus the average for the last 12 months. Do you understand the key times of year for your brand and category? How does this influence your planning?



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Source: Ipsos iris Online Audience Measurement Service, December 2022 – November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

Fintech tracker users are the youngest, while gym brand visitors are the highest income

Gym visitors are the most likely to be heavy tech users, while the audience for fitness trackers has the largest proportion of heavy games visitors. Do you know how your users behave beyond your brand? How might this shape your messaging and products?

	Audience Composition				
	Female	Aged 15-44	Income >£50k	Heavy technology visitors	Heavy games visitors
Fitness & Exercise	**54%**	**56%**	**20%**	**29%**	**16%**
Fitness trackers	55%	52%	20%	34%	19%
Gyms	59%	73%	22%	38%	14%
Fintech trackers	46%	78%	19%	33%	18%

Heavy users are defined as people in the top two deciles for time spent on that category
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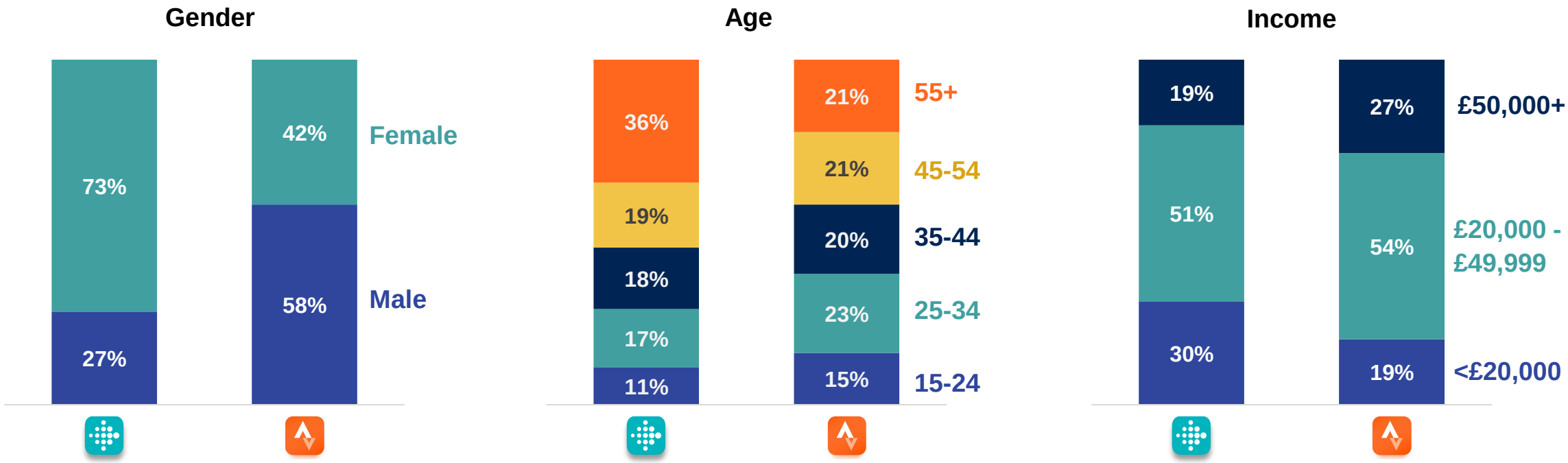
Even within categories, there can be large differences in audience

The profiles of Fitbit and Strava app users are quite distinct. Understanding what sets you apart from competitors can help you stand out in a competitive market.

Fitbit app vs Strava app: demographic profile



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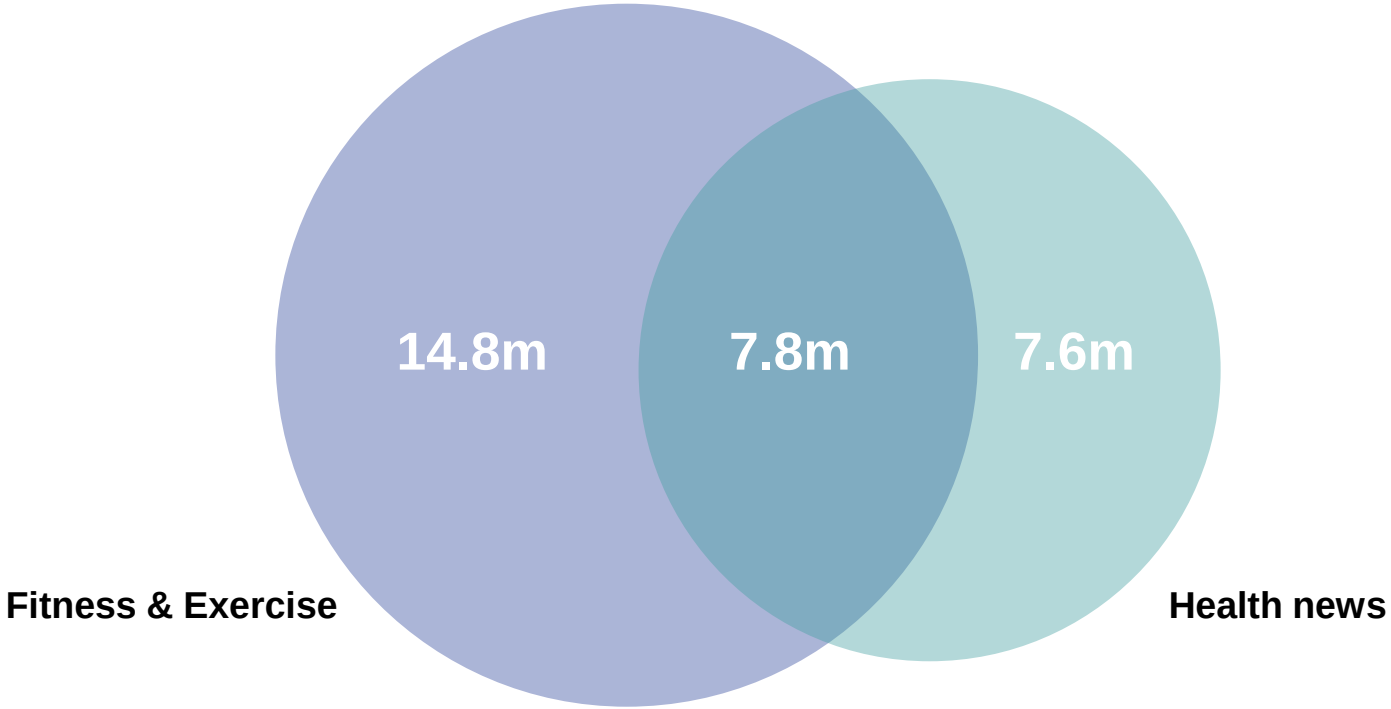
ADVERTISING & PARTNERSHIPS

03

Over half of health news visitors access Fitness & Exercise brands each month

Related content like health news can help reach an audience interested in fitness & exercise

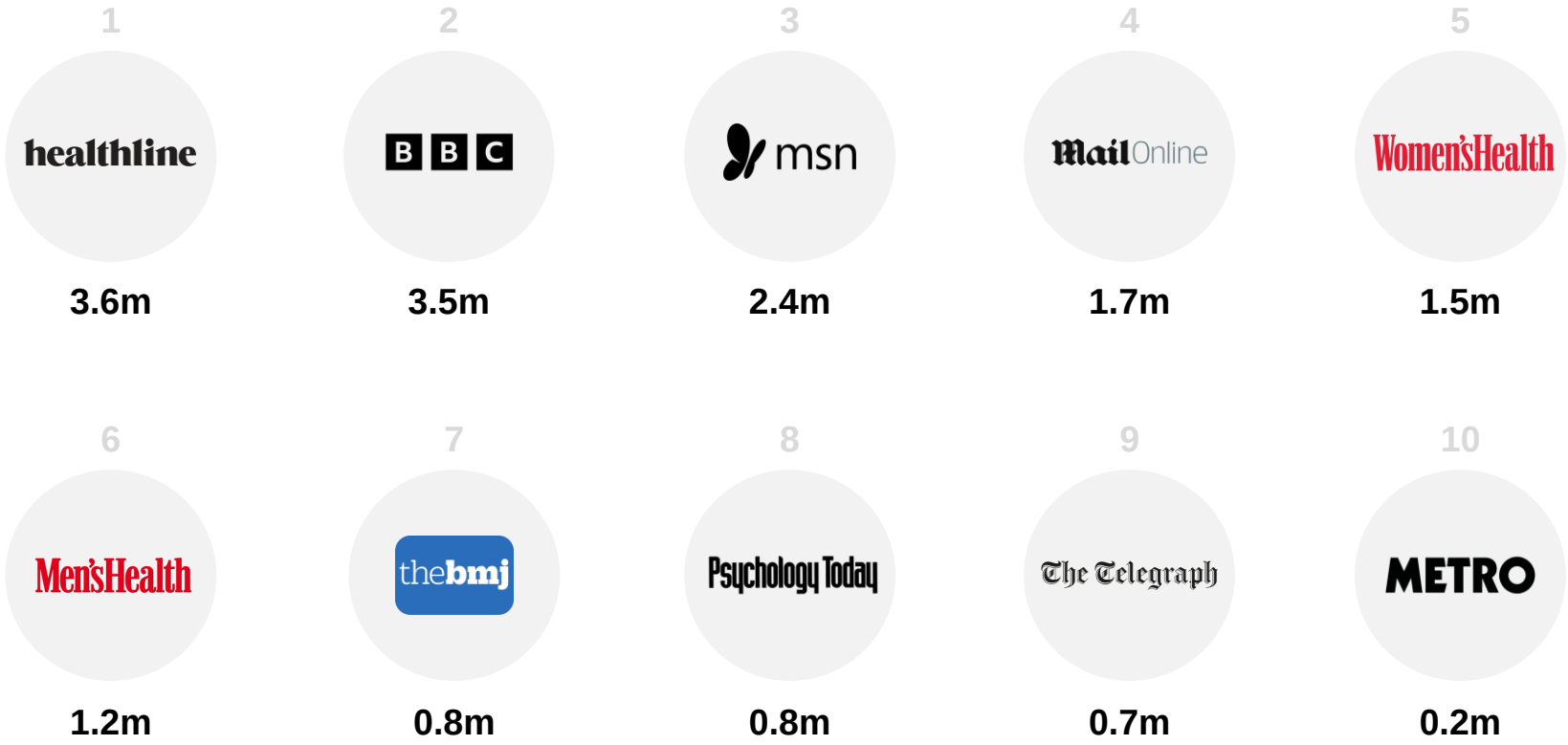
Shared audience between categories
November 2023



Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

Healthline was the biggest health news brand in November, followed by the BBC

Top 10 Health news brands* by audience – November 2023



*For BBC, MSN, Mail Online, The Telegraph and Metro, audience figure will correspond specifically to the health section(s) of their websites

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Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

Different news and magazine brands attract users of different fitness brands

All news and magazine titles heavily over index with certain brands, but Men's Health and Women's Health visitors have particularly high affinity with their top two fitness brands. Do you know which brands your visitors have the highest synergy with?

% likelihood to visit vs total internet population

	BBC NEWS Health	Mail Online Health	Men's Health	Women's Health
1	STRAVA +56%	fitbit +37%	STRAVA +149%	myfitnesspal +142%
2	myfitnesspal +55%	myfitnesspal +35%	GARMIN +145%	GARMIN +117%
3	fitbit +13%	GARMIN +16%	myfitnesspal +127%	STRAVA +57%
4	GARMIN +8%	STRAVA -27%	fitbit +41%	fitbit +34%

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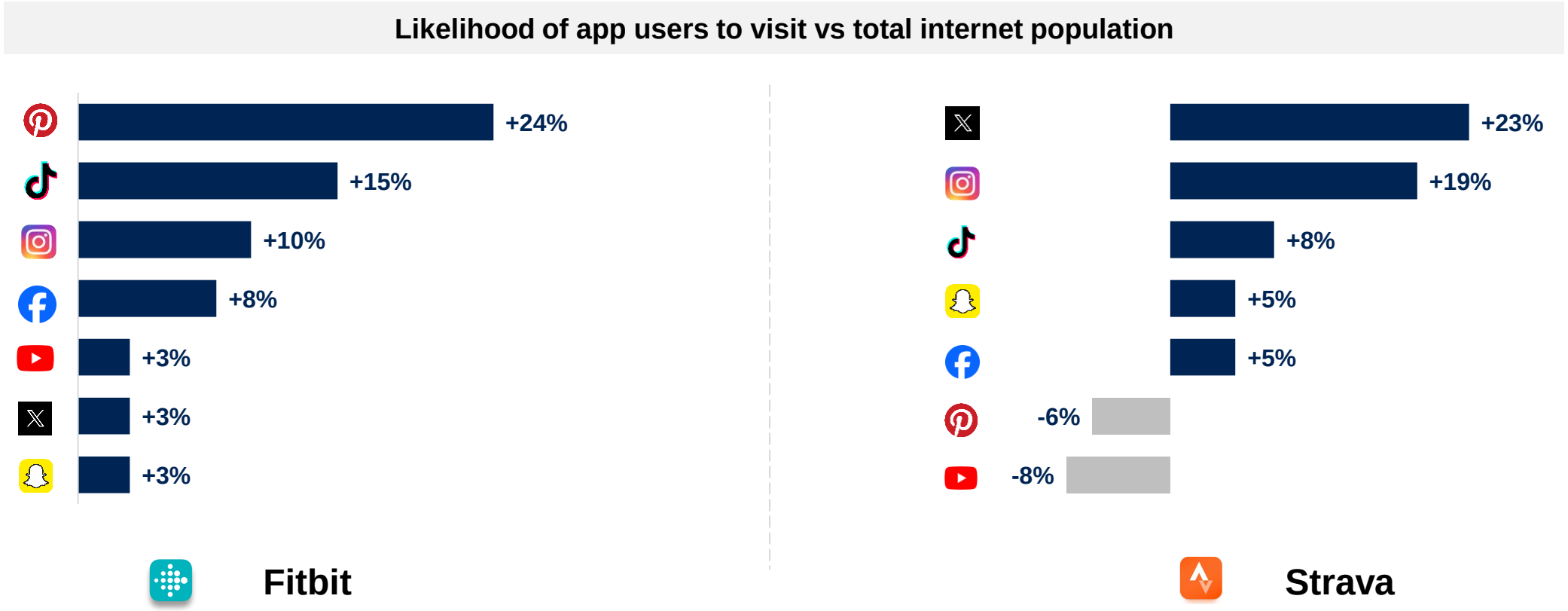
Different audiences also means different social platforms will be needed

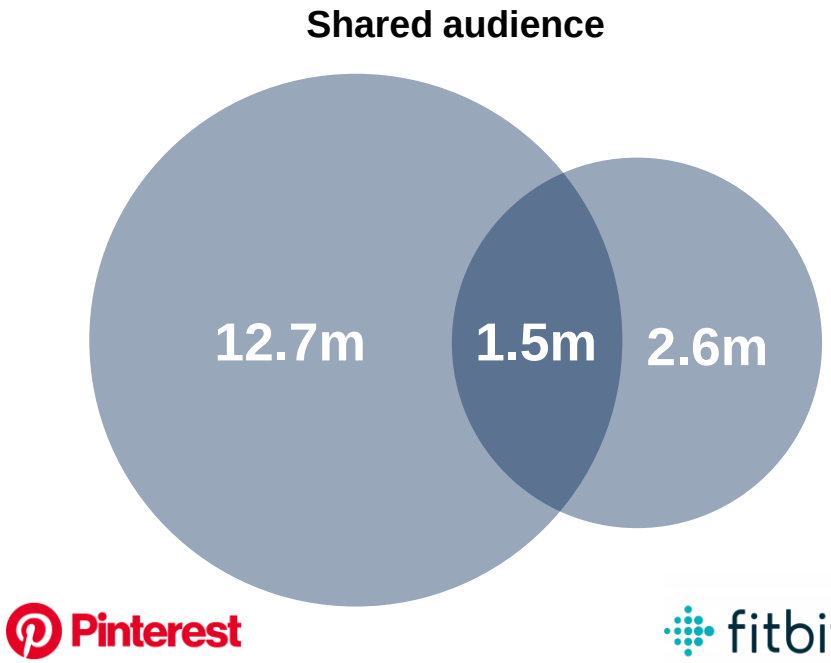
You can match your brand to the right social media platforms for you: Fitbit users are more likely to be on Pinterest and TikTok, while Strava users are on X and Instagram. Which platform is best for your audience?



Source: Ipsos iris Online Audience Measurement Service, November 2023, UK Only, All aged 15+ using PC/laptop, smartphone or tablet(s).

Fitbit + Pinterest creates a younger, more heavily female audience interested in tech

Understanding how your customers vary across different platforms means you can be more targeted, tailor your messaging, and boost effectiveness



	fitbit	fitbit + Pinterest	Difference
15-24	10%	15%	+56% ▲
Female	71%	83%	+16% ▲
Earn £50k+	19%	15%	-19% ▼
Heavy tech visitors	35%	41%	+16% ▲
Agree they have a keen sense of adventure	43%	46%	+7% ▲

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Key takeaways – Fitness & Exercise

OPPORTUNITY SIZING: NEW YEAR, NEW MAY?

Interest in fitness and exercise surges at the beginning of the year, but engagement actually peaked in May. **Are you planning your activity around these key dates?**

AUDIENCE PROFILE: THE RIGHT FIT

The fitness & exercise category skews female and slightly younger. They are also interested in careers and tech content. **How can better understanding this audience influence your planning, partnerships and propositions?**

PARTNERSHIPS: HEALTH NEWS = HEALTHY VIEWS

Health content from news brands and magazines is great for reaching an audience interested in fitness & exercise. **Which news or magazine audiences best suit your brands?**

PARTNERSHIPS: SOCIAL MEDIA WORKS OUT

Users of different fitness apps are more likely to use different social media sites: **do you know the best place to reach your users? How should your messaging vary across platforms?**

FOR MORE INFORMATION

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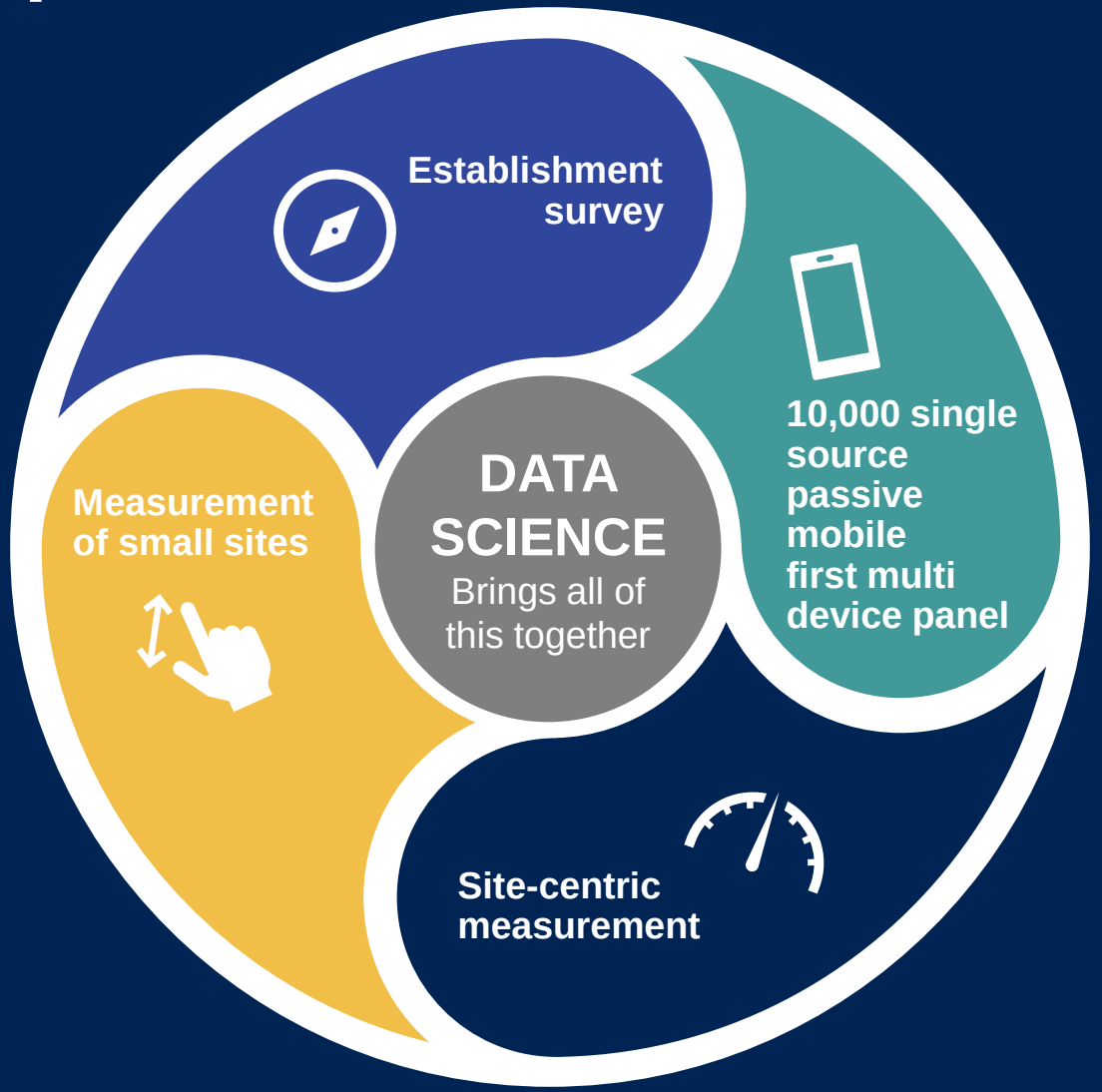
About Ipsos iris

Key pillars of approach



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Providing you with these key metrics

Desktop / laptop, smartphone and tablets

Websites, mobile websites and apps
(c7,000 sites and c1,500 apps)

Text and video

Demographic, geographic, and attitudinal audiences

Interest based categorisations
e.g. sport, food, news, technology, finance etc

Enhanced audiences
e.g. ACORN, FRESCO, psychographic segmentation

Monthly data segmented by day of week, weekday, weekend with some time of day analysis

Daily data
(36hrs after)

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Rich profiling and targeting capabilities

Age	Disabilities	Interests
Gender	Children	Live TV days
Sexual orientation	Parent / guardian / grandparent	Live TV hours
Social grade	HH size	Radio days
Ethnicity	Main shopper status	Radio duration
Income	Nation	Regular paper use
Chief income earner	Region (ITV / GOR)	Regular paper duration
CIE working status	Cities & towns	Magazine use
Marital status	Lifestyle statements	Magazine duration

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Attitudes underpin behaviour

1.	You should seize opportunities in life when they arise
2.	I find it difficult to balance work, children and social life
3.	I often do things on the spur of the moment
4.	I have a keen sense of adventure
5.	I want to get to the very top in my career
6.	I make a conscious effort to recycle
7.	I would be willing to volunteer my time for a good cause
8.	I take great pleasure in looking after my appearance
9.	I prefer to be active in my leisure time
10.	Money is the best measure of success
11.	I like to go to trendy places to eat and drink
12.	It's worth paying extra for quality goods
13.	I am prepared to pay more for products that make life easier
14.	I buy new products before most of my friends
15.	I only buy products from a company whose ethics I agree with
16.	Celebrities influence my purchase decisions
17.	I would be prepared to pay more for environmentally friendly products
18.	I spend a lot of money on toiletries and cosmetics for personal use
19.	I really look after my health
20.	I wear designer clothes
21.	I like to keep up with the latest fashions
22.	I try to keep up with developments in technology
23.	I change the decorations at home as often as I can
24.	I am passionate about travelling
25.	With a credit card I can buy the sort of things I couldn't normally afford
26.	I look for profitable ways to invest my money
27.	I like different people, cultures, ideas and lifestyles around me
28.	I am increasingly aware of the price of goods and services
29.	I like to enjoy life and don’t worry about the future
30.	I am interested in any technology that saves me time
31.	I find it hard to find time to relax
32.	Online TV streaming services have changed the way I watch television
33.	I’m prepared to make lifestyle compromises to benefit the environment
34.	I make more purchases online than I do in store

Reports available

Media

Analyse media entities by target group. The results are based on your selection and category filters.

Media Plus

A flat reporting structure. The results are static and not based on your selection and category filters.

Category

Analyse top categories performance during selected months.

Profiling

Identify the profile composition of selected media.

Ranking

Rank organisations, brands, websites and apps.

Cross-visiting

Analyse cross visitation and duplication of audiences between different media entities.

% Change

Analyse the differences and changes between different time period.

Dayparts

See the breakdown of the selected media or category by time-of-day.

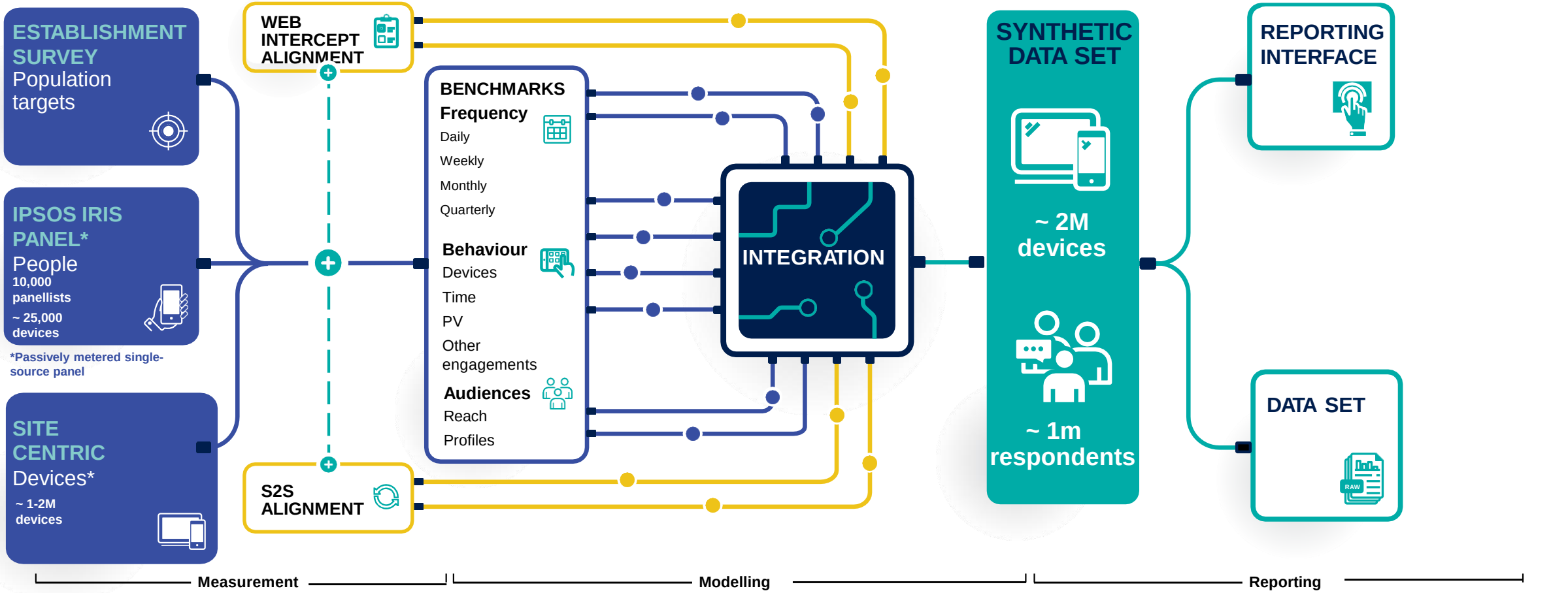
Trend Analysis

Check the performance of the selected media through multiple period of times.

Methodology

A hybrid measurement solution combining a single-source panel with site-centric measurement.

Ipsos iris is the UKOM-endorsed service for the measurement of audiences of online content. It uses a hybrid methodology combining metered data from a core 10,000 single-source panel with census site-centric measurement. The diagram below summarises the inputs and processes involved in the production of Ipsos iris audience data.



More detail on the methodology can be find at: https://ukom.uk.net/ipsos-iris-overview.php

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Core KPIs iris tracks

Reach	Time spent	Page views / visits	Composition / index	Video	Duplication
Audience (000s)	Total mins (MM)	Page views (MM)	Audience composition (%)	Video audience (000s)	Cross audience (000s)
Audience reach (%)	Avg. mins pp	Avg. pvs pp	Pvs composition (%)	Video audience reach (%)	Cross audience (%)
Avg. daily audience (000s)	Avg. daily mins (MM)	Avg. pvs (daily)	Mins composition (%)	Video mins (MM)	Exclusive audience (000s)
Avg. daily audience reach (%)	Avg. daily mins pp	Avg. pvs pp (daily)	Audience affinity index	Video views (MM)	Exclusive audience (%)
Audience shr. (%)	Avg. mins per pvs	Pvs shr. (%)	Pvs affinity index	Av mins per video	Exclusive audience share (%)
	Mins shr. (%)	Visits (000s)	Mins affinity index	Av video views pp	Audience duplication (000s)
	Avg. mins per visit	Avg. visits pp	Visits composition (%)	Av video views pv	Audience duplication (%)
		Avg. pvs (visit)	Visits affinity index	Video audience affinity index	
		Avg. daily visits		Video audience composition (%)	
		Avg. daily visits pp		Video mins affinity index	
		Visits shr. (%)		Video mins composition (%)	
				Video views affinity index	
				Video views composition (%)	

(Coming soon metrics in orange)

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