centercode CONSUMER INSIGHTS REPORT

Health & Fitness Wearables

With Data From Over 2,200 Users

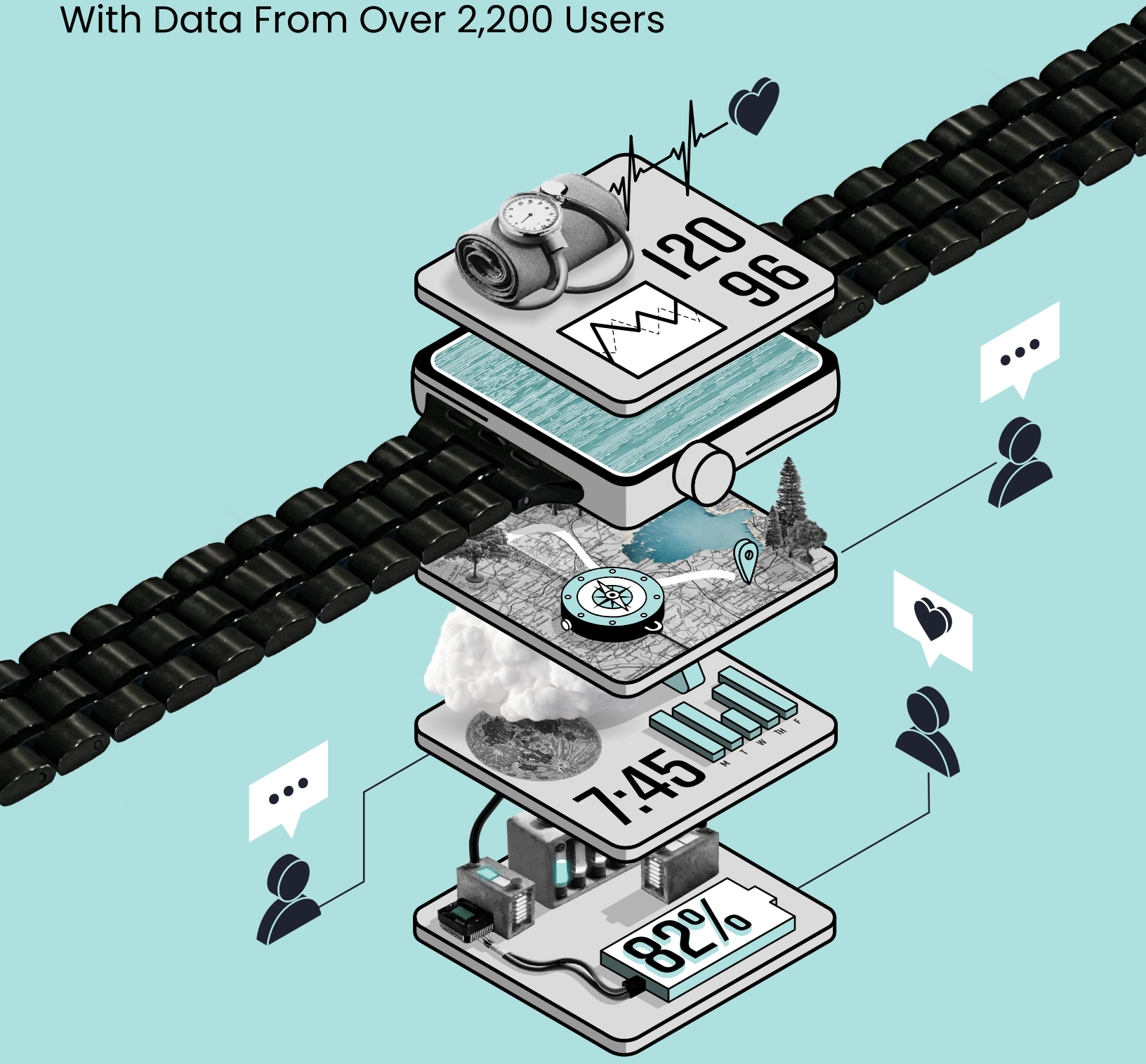


Table of Contents

Introduction 3
About the Survey 3
About the Users 4
- What 2,278 Users Really Think About Their Fitness Trackers 5
- What are the most popular brands in 2023? 5
- Why are consumers purchasing new wearable health & fitness trackers? 5
- What do users like about their devices? 6
- How could devices be improved? 6

What do consumers wish their device had? 7
- Blood Pressure Monitoring 7
- Longer Battery Life 8
- Improved Sleep Tracking 9
- GPS & Location Features 10
- Heart Rate Monitoring 11
- Other Features 12

How long have consumers owned their devices? 13
- Length of Ownership in 2023 13
- Is retention still a problem? 13
- Have you recently stopped using your primary tracker? 13

Wrapping It Up 14

Introduction

For over 20 years, Centercode has helped technology make the world a better place by providing actionable insights to busy product managers. Today, we want to leverage that experience to bring you an in-depth report on consumer attitudes and behaviors with wearable technology, sourced from our community of over 250,000 beta testers from across the globe.

About the Report

Staying ahead in the fast-paced world of health and fitness technology isn't just about the next big innovation; it's about deeply understanding the people who use your products. This report is crafted for you, the product development teams steering the course of wearable technology.

Here, we delve into the heart of what makes wearables not just functional but indispensable to users. You'll find a treasure trove of insights gathered from extensive survey data, shedding light on the real-world experiences, needs, and desires of fitness tracker users. From the nuanced preferences between Android and iOS users to the feedback on features like step counting and heart rate monitoring, this report is your guide to understanding the user journey.

But it's more than just data. This is about the transformative impact of user testing in shaping products that resonate with customers. We'll explore how effective beta testing strategies can bridge the gap between a good product and a great one, ensuring your wearable stands out in a crowded market.

As you turn these pages, envision a path where each insight leads to more intuitive, user-centric, and innovative products.

About the Survey

We wanted to get into the heads of folks using fitness trackers. What makes them tick? Why do they buy them, and what keeps them using (or not using) them? Our marketing wizards teamed up with our community gurus at Betabound. They brainstormed and came up with some cool questions about what trackers people have, why they bought them, what they love or don't love about them, and if they're still into them.

We aimed this survey at everyone who's got a fitness tracker on them, and even those who don't. And yeah, we got a whole section in our report called 'About the Users' that digs into who they are.

Once we gathered this data, we organized it and had a chat with our content folks. They helped us turn all these numbers and feedback into a report that's more like a story – a story about real people and their fitness gadgets.

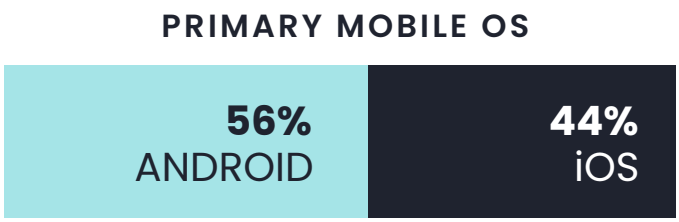
About the Users

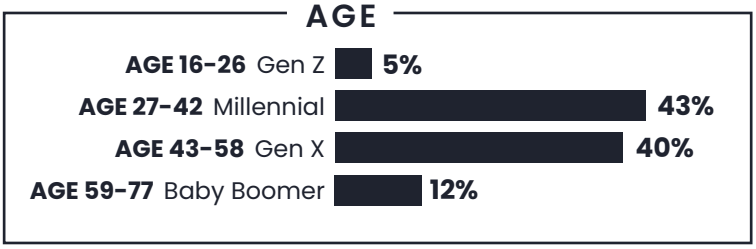
Our survey reached an impressive 2,278 responses from health and fitness tracker users to those that don't own any wearable tech, offering a broad view of the market.

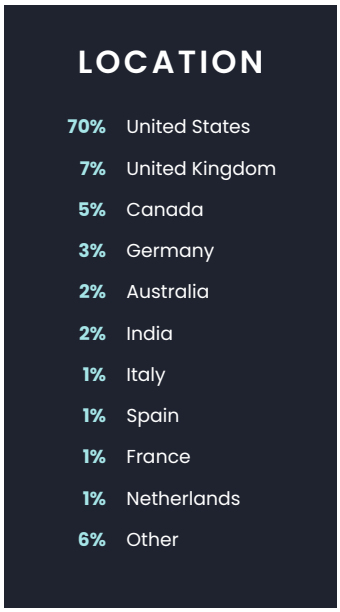
Demographically, the crowd was diverse in age and gender. The average age of our respondents was around 44 years, with people as young as 18 and as seasoned as 86. People identifying as men were in the majority, but there was a significant representation of those identifying as women and those who were non-binary or did not answer.

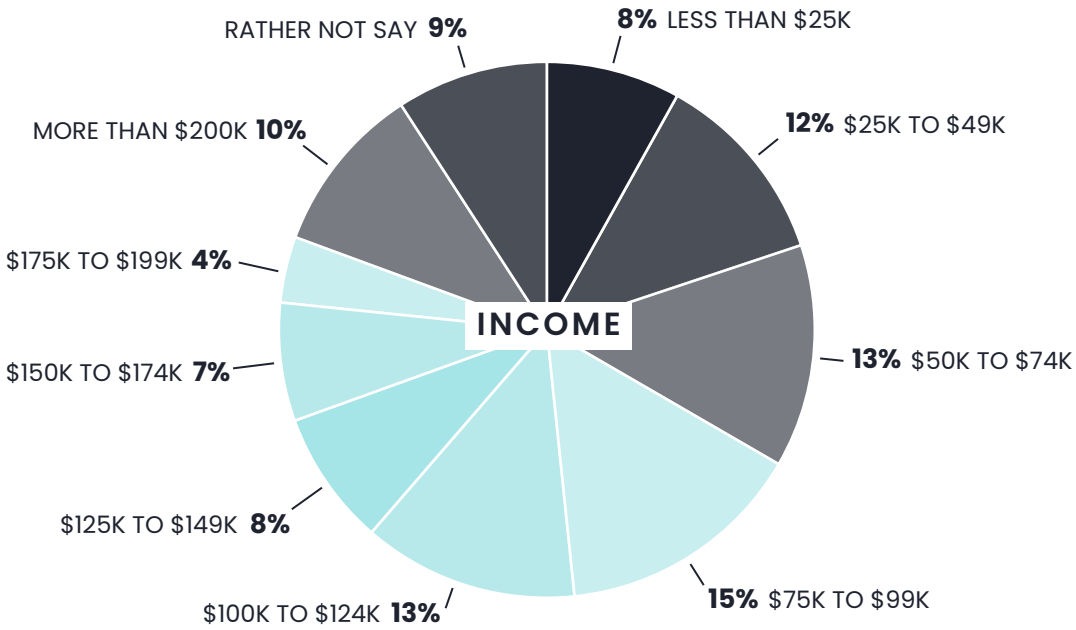
Geographically, this was a global conversation. Respondents hailed from 53 different countries, with the United States leading the pack. This international mix added depth and variety to our insights, making our study rich with perspectives from different corners of the globe.

In a nutshell, our respondents were as varied as their fitness goals – young and old, from all over the planet, each with their unique take on what makes a fitness tracker work for them.





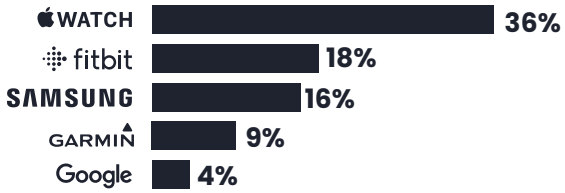




What 2,278 Users Really Think About Their Fitness Trackers

What are the most popular brands in 2023?

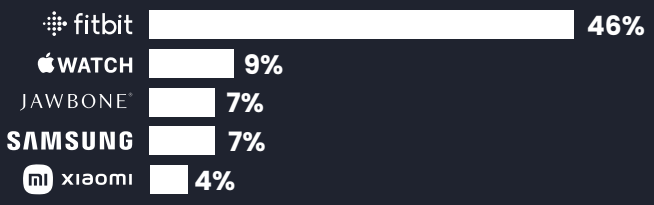
In 2009 Fitbit released its first tracker, and 6 years later the first Apple Watch was introduced. Since then there has been significant and steady evolution in the health and fitness wearables space.



Now, the questions that come to mind are: 1) how are these brands at the top going to grow, and 2) how will the other brands take market share or build a new market?

COMPARISON TO 2015

Back in 2015, almost 1 in 3 users abandoned their wearable. Now less than 1 in 10 have relegated their wearable to the junk drawer. Adoption is up and so is the competition. This survey collected insights from over 85 unique brands. So what drives consumers to purchase a wearable?



Why are consumers purchasing new wearable health and fitness trackers?

15%

MOTIVATION FOR HEALTH

Of course, this staple didn't fall off the top report, healthy living through tracking is still a key motivator to purchase.

19%

REPLACEMENT TRACKER

With fewer people abandoning their trackers, eventually consumers will look to upgrade their devices to get more functionality.

26%

SPECIFIC FEATURES

Many users chose their tracker for particular features or functionalities they wanted. As wearables evolve beyond tracking steps and distance, new features capture attention and can even carve out new niches.

COMPARISON TO 2015

Our last survey in 2015 had 37% of respondents saying they purchased their fitness tracker to reach and maintain their fitness goals, 24% to lose weight, and 15% just to own new gadgets.

What do users like about their devices?

Heart Rate Monitoring: This feature refers to the tracker's ability to monitor and record heart rate data, which is highly valued for its health and exercise tracking benefits.

Step Counting: This involves the tracker's capability to count steps, a fundamental feature for those using trackers to monitor their daily physical activity.

Sleep Tracking: This feature pertains to the ability of the tracker to monitor and analyze sleep patterns, an important aspect for users interested in their sleep health.

How could devices be improved?

- **Battery Issues:** This includes problems related to the tracker's battery life, such as insufficient battery life or the frequent need to charge. This was more common in devices like the Apple Watch.
- **High Price:** This reflects concerns about the cost of the tracker being too high or not offering value for the money paid.
- **Difficulty of Use:** This points to issues with the user interface being complicated or the tracker being difficult to operate.
- **Limited Functionality:** This involves dissatisfaction with the range of features and/or capabilities the tracker offers.
- **Connectivity Issues:** This includes problems related to syncing with other devices, Bluetooth connectivity, or general connection stability.

What do consumers wish their device had?

1 Blood Pressure Monitoring

The top request was for blood pressure monitoring. According to the American Heart Association, half of U.S. adults should monitor blood pressure at home. Current devices on the market are clunky, don't offer much versatility, and flat-out aren't convenient. So, the request falls to the brands and devices they trust and use on a daily basis to innovate and creatively solve their problem.

'blood pressure readings'

Age: 34 **Location:** Texas
Brand: Apple **Model:** Watch Series 6

'Blood pressure analysis'

Age: 60 **Location:** Washington
Brand: Fitbit **Model:** Iconic



'Blood pressure data'

Age: 25
Location: Arizona
Brand: Apple
Model: Watch Series 3

'Blood pressure monitoring'

Age: 45 **Location:** New York
Brand: Garmin **Model:** Venu

What do consumers wish their device had?

2 Longer Battery Life

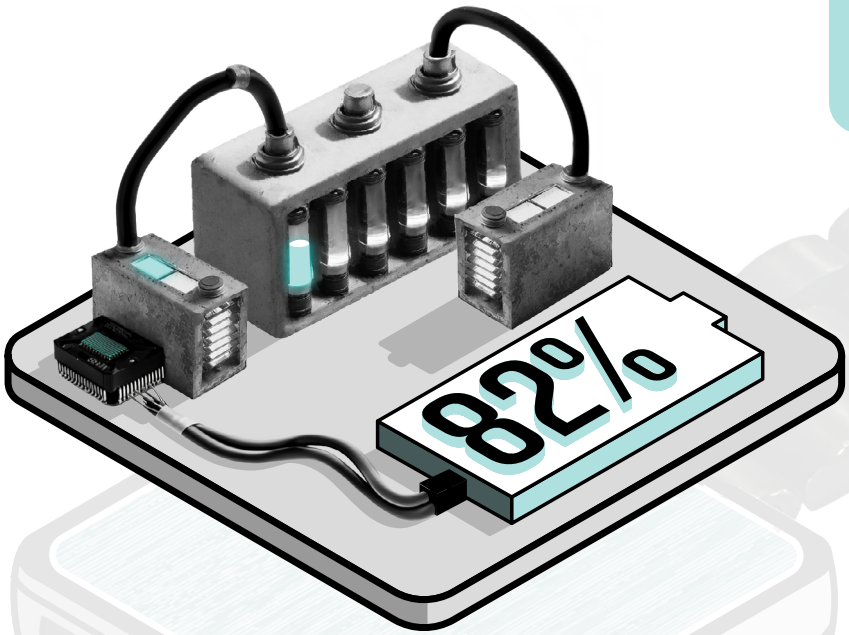
Every year health and fitness wearables seem to release better and longer lasting batteries for their devices. Some companies like Whoop are even taking innovative approaches to charging with a battery pack to charge on the go, so you wouldn't even need to take off your device. However, many users still requested longer battery life. It seems as devices add more functionality and get more usage, users are still encountering issues with their batteries.

'Better battery life'

Age: 46 **Location:** Texas
Brand: Apple **Model:** Watch Series 6

'Battery that lasts longer'

Age: 53 **Location:** Pennsylvania
Brand: Apple **Model:** Watch SE



'Battery life boost'

Age: 28
Location: Tennessee
Brand: Fitbit
Model: Alta

'Longer lasting battery'

Age: 42 **Location:** Florida
Brand: Garmin **Model:** Fenix 5

What do consumers wish their device had?

3 Improved Sleep Tracking

In light of the American Academy of Sleep Medicine (AASM) and Sleep Research Society (SRS) recommending “7 or more hours per night” for optimal health, and with over a quarter of US adults not meeting this, the need for better sleep tracking is more evident than ever. Consumers want wearables that go beyond counting hours. Ideally, their device would analyze sleep quality, utilizing metrics like SpO2 and skin temperature. This push for innovation in sleep tracking is not just a desire for something shiny and new, but a step towards meeting critical health standards.

‘Better sleep tracking’

Age: 26 **Location:** Maryland
Brand: Apple **Model:** Watch Series 7



‘Wish sleep tracking was more accurate’

Age: 50 **Location:** North Carolina
Brand: Samsung **Model:** Galaxy Watch 5

‘Sleep rhythms’

Age: 31
Location: Michigan
Brand: Fitbit
Model: Versa 2

‘Better sleep tracking. My cheap Fitbit was much more accurate. I just stopped tracking sleep on the Garmin because I could tell it was way off.’

Age: 42 **Location:** Michigan **Brand:** Garmin **Model:** Vivoactive 4s

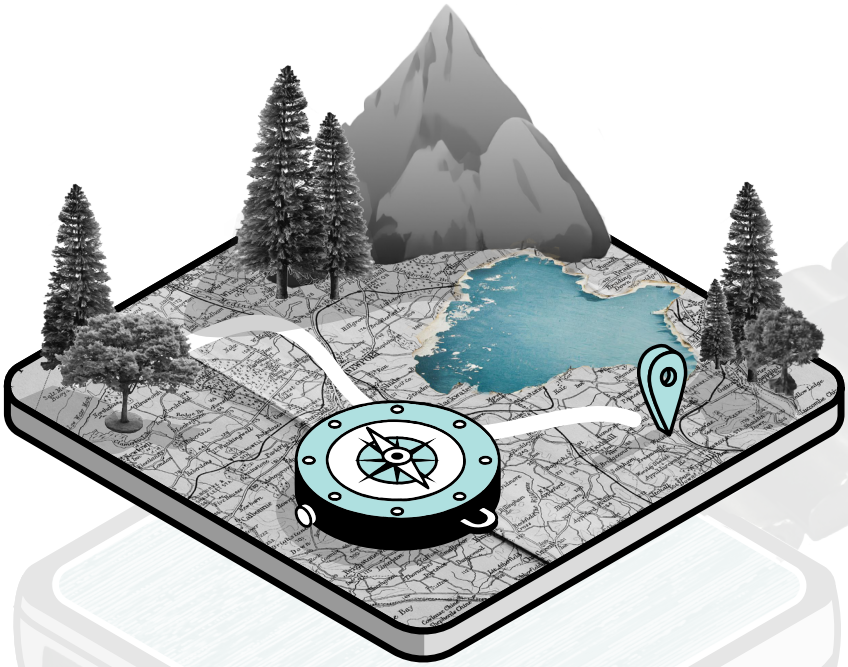
What do consumers wish their device had?

4 GPS & Location Features

Many fitness wearables already offer some form of GPS functionality. However, consumers are still rallying for better precision and more advanced features. Consumers seem to be seeking wearables that work without mobile devices, complete with detailed maps for offline use and precise location tracking. This shift towards independent, phone-free navigation reflects a desire for devices that aren't just backup maps but primary, reliable tools for safe and informed exploration.

'GPS for hiking'

Age: 35 **Location:** British Columbia
Brand: Samsung **Model:** 6



'Better gps'

Age: 44
Location: Rason
Brand: Apple
Model: Watch Ultra

'Yes I wish it did GPS functions without my phone.'

Age: 42 **Location:** Florida
Brand: Google **Model:** 1st Gen

GPS/tracking without an activity in progress

Age: 29 **Location:** British Columbia
Brand: Garmin **Model:** Forerunner 945

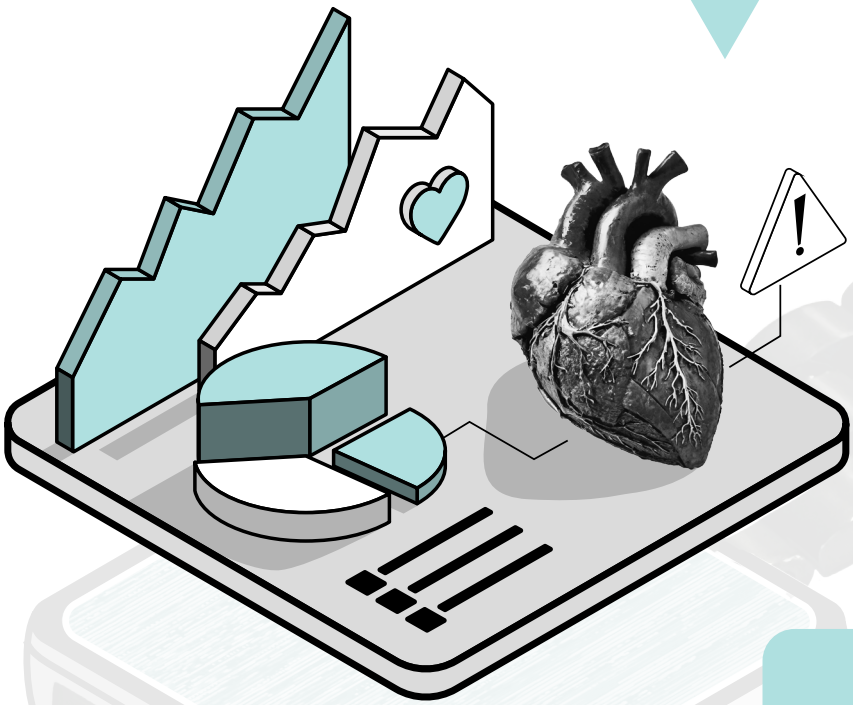
What do consumers wish their device had?

5 Heart Rate Monitoring

Consumers across the board are seeking more from their heart rate monitors. They want devices that not only track but also interpret and alert, turning data into actionable insights. While Apple users push for better integration, Samsung and Garmin users crave extra safety and precision. Meanwhile, users of brands like Fitbit are eager to level up, demanding features that rival or even surpass their more established counterparts. In essence, everyone's after a smarter, more proactive wearable that truly understands and caters to their heart health.

'Heart issue warning'

Age: 58 **Location:** Wisconsin
Brand: Samsung **Model:** Galaxy Watch 5 Pro



'Live Heart rate monitor and Oxygen tracking and Live temperature.'

Age: 40 **Location:** Louisiana
Brand: Oura **Model:** Gen 2

'Heart rate monitor sharing with other apps'

Age: 43 **Location:** Georgia
Brand: Apple **Model:** Watch Ultra

'Warn about heart issues like Apple Watch'

Age: 34 **Location:** Nevada
Brand: Fitbit **Model:** Inspire

What do consumers wish their device had?

6 Other Features

Fitness wearable users want more than just step counts; they're after devices that truly understand and cater to their health and lifestyle. Beyond the specifics we've already covered, they're looking for advanced features like stress monitoring, smart assistant integration, and health sensors for things like temperature, oxygen, and glucose levels. Essentially, they desire wearables that are proactive health partners, offering a deeper, more personalized insight into their well-being while fitting seamlessly into their daily lives.

'Skin temperature reading'

Age: 62 **Location:** Kentucky
Brand: Fitbit **Model:** Versa 3

'Oxygen sensor'

Age: 42 **Location:** Virginia
Brand: Samsung **Model:** Galaxy

'Stress monitor'

Age: 39 **Location:** Friesland
Brand: Google **Model:** Pixel Watch 1





Glucose monitoring

Age: 42 **Location:** Ohio
Brand: Apple **Model:** Watch

How long have consumers owned their devices?

Length of Ownership in 2023

I'm a newcomer (Less than 6 months)	**8%**
A little while (6 months - 1 year)	**12%**
Intermediate user (1-3 years)	**33%**
Seasoned user (3-5 years)	**24%**
A long-timer (More than 5 years)	**22%**

Is retention still a problem?

Back in 2015, 28% of respondents had stopped using their device after a month. Now in 2023, less than 7% of respondents have stopped using their device so retention no longer appears to be an issue. As wearable technology has evolved over the years to incorporate more features like mobile notifications, heart rate monitoring, and workout detection, consumers are keeping their devices around for longer. Modern health, fitness, and wellness trackers meet user expectations more holistically than in the past. Without major innovations or killer feature introductions, it would seem that most of the market doesn't see a compelling reason to upgrade.

With retention now mostly a problem of the past, the real test for wearables is sparking deep brand loyalty in a world where consumers aren't rushing to upgrade.

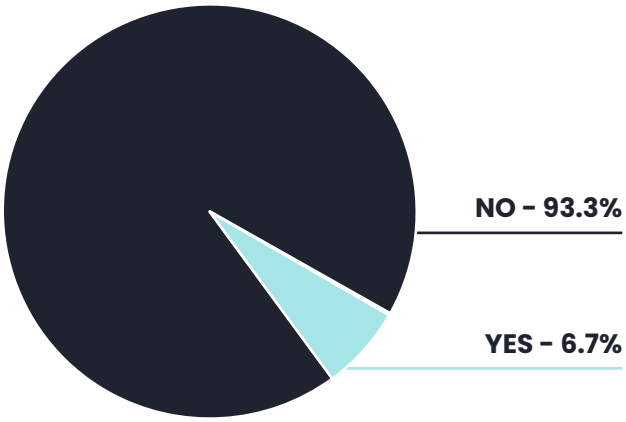
COMPARING TO OUR 2015 REPORT

When we did our first report in 2015 wearables was a hot, new market. Looking at the data from 2023, people have owned their trackers for some time now. Wearables seem to have been adopted by a larger majority of the market when compared with 2015.

LENGTH OF OWNERSHIP IN 2015

Less than 6 months	40%
6 - 12 months	32%
1 - 2 years	19%
More than2 years	8%

Have you recently stopped using your primary tracker?



Brands need to evolve from mere gadget creators to integral lifestyle partners, weaving their way into every facet of the user experience. It's about making every touchpoint count, ensuring loyalty goes beyond the device to the whole brand ecosystem. This complex challenge requires a blend of keen listening, innovative thinking, and genuine connections to win over users. Brands must intuitively understand and adapt to users' changing needs, making themselves an essential part of their health and wellness journey. The aim? Turn customers into brand champions, bonded not just to a product, but to the brand's entire vision and values.

Wrapping It Up

The insights presented here are more than just numbers; they are a beacon guiding product development teams towards creating more intuitive, user-centric, and innovative products. As you review these findings, remember that the key to success in the dynamic world of technology lies in continuously engaging with and understanding your users. This approach will not only enhance the user experience but also ensure that your product stands out in a highly competitive market.

We hope this will serve as a foundational tool in your product journey, aiding you in crafting wearable technology that resonates deeply with users and leads the way in innovation. The future of health and fitness technology is bright, and with these insights, you're well-equipped to be the vanguard!

centercode

Centercode is the leading platform for managing impactful in-the-wild user tests.

START FOR FREE, SCALE AS YOUR PROGRAM GROWS.

PLATFORM OVERVIEW



Run real-world user tests with passionate audiences to release amazing products every time.

PRODUCT LAUNCH

Engage your **Target Market** to successfully bring new products and services to market

USE CASES:
- Beta Tests
- User Acceptance Tests
- Field Tests

PRODUCT GROWTH

Recruit **Existing Customers** to continuously mature live products and services

USE CASES:
- Progressive Delivery
- Early Access
- Customer Advisory Boards

CUSTOMER ZERO

Gather **Employee** feedback to enhance your products while fostering a product culture

USE CASES:
- Alpha Tests
- Dogfooding
- Employee Tests

COMPETITIVE EDGE

Enlist **Competitors' Customers** to rapidly gain actionable intel about their products

USE CASES:
- Competitive Intelligence
- Market Testing
- Comparative Research

GET STARTED FOR FREE
OR SCHEDULE A LIVE DEMO TO LEARN MORE

SCHEDULE A DEMO

START FOR FREE!

WHY CENTERCODE?

Increase Revenue
½ ★
INCREASE
in product ratings

Release Sooner
50%
FASTER
test cycles

Gain Participation
75%
INCREASE
in tester engagement

Save Time
40% +
DECREASE
in time managing tests