



# THE STATE OF THE HEALTH & FITNESS APP MARKET 2023

EXPLORING CURRENT TRENDS IN THE HEALTH & FITNESS APP MARKET

## **METHODOLOGY**

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**04**

## **MARKET OVERVIEW**

---

**05**

## **BENCHMARKS**

---

**10**

## **CREATIVE TRENDS**

---

**14**

## **TOP USER ACQUISITION STRATEGIES**

---

**17**

## **KEY TAKEAWAYS**

**20**

# INTRODUCTION

Although worldwide download figures for Health & Fitness apps are declining each quarter, the industry is still constantly innovating and growing. Developers are creating new technology and mobile products, and despite economic challenges, the industry is growing in both usage and revenue.

Mobile fitness apps are particularly popular, with a surge in daily active users and at-home fitness solutions. To succeed in this industry, it's important to stay informed about the latest trends and technologies. During the COVID-19 pandemic, the fitness app vertical experienced significant growth and this trend has continued even after the end of lockdowns. As a result, the industry generated \$1.7 billion in revenue during 2022, an increase of \$300 million from the previous year and \$600 million from the lockdown year of 2020.

However, due to the competitiveness in this app vertical, it can be challenging to succeed with fitness apps. To maximize the potential of a mobile app, it's crucial to analyze data and use the best-performing ad strategies for this type of app.

This report focuses on the fitness app market in 2022, including trends and the best-performing strategies, along with predictions for the current year and beyond. Whether you are a developer, marketer, or analytical service provider, this report delivers valuable insights to succeed in the Health & Fitness app industry today.

## Yearly revenue for Health & Fitness app vertical worldwide



Across both App Store and Google Play

# METHODOLOGY

## AdQuantum's data

Study period: **2022**

Platforms: **iOS and Android**

GEOs: **US, Tier-1 countries, Europe, Asia, LATAM**

Traffic sources: **Paid Social**

Ad spend: **\$7,000,000**

Number of downloads: **over 3,000,000**

## Sensor Tower's data

- Download, usage, and consumer spending **trends from Q1 2020 through Q4 2022**.
- **The most popular Health & Fitness subcategories across Sensor Tower:** Health & Wellness, Fitness & Weight Loss, Period Tracking & Birth Control Apps, and Sleep & Meditation apps.



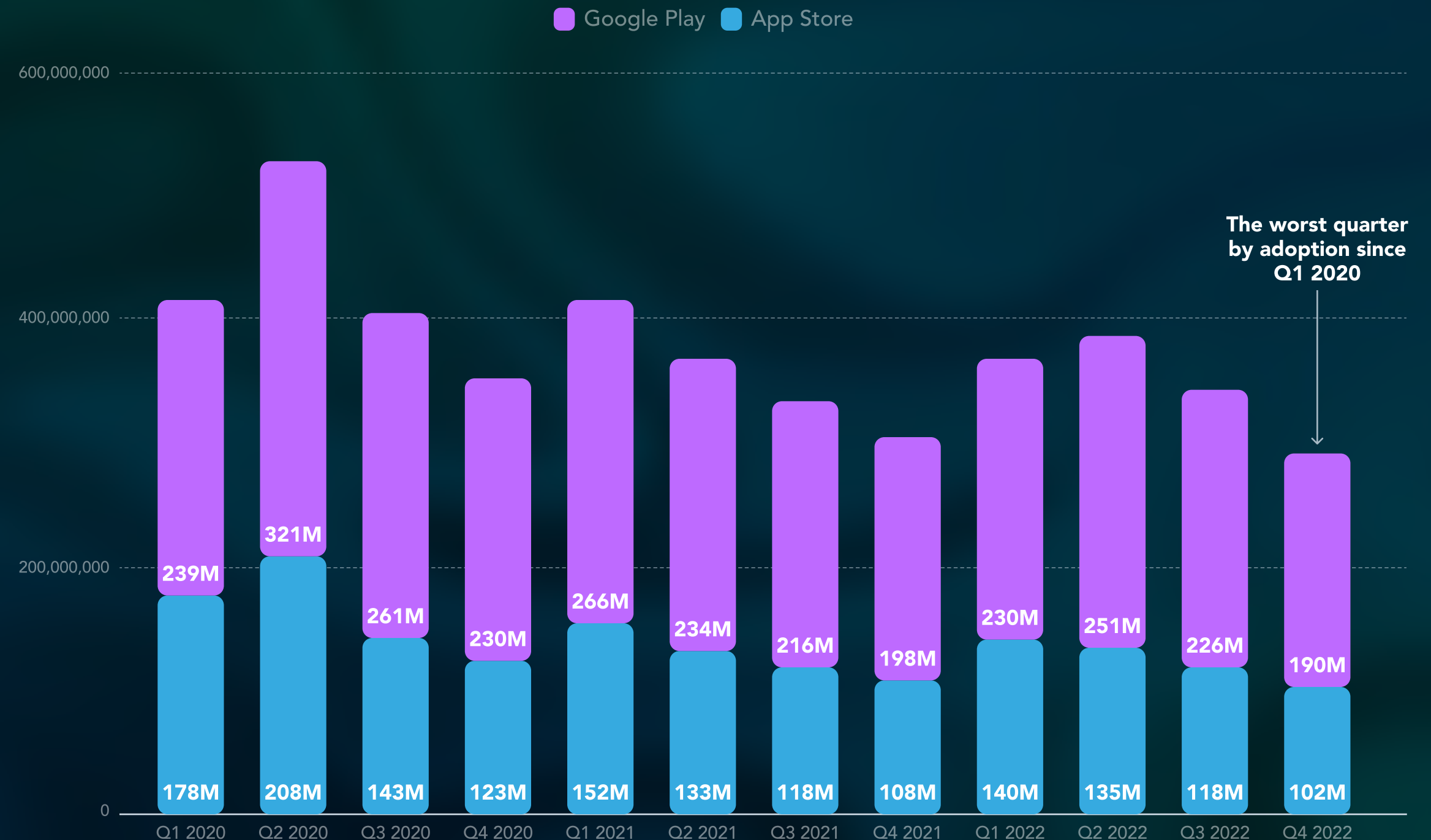
# MARKET OVERVIEW

**In 2022, the number of downloads of Health & Fitness apps in the top categories surpassed 290M across both App Store and Google Play, making it the worst quarter since Q1 2020.**

The COVID-19 lockdowns accelerated the adoption of apps that provide personalized workout routines, meditation classes, and diet and nutrition plans for home use. Even though most COVID-19 restrictions have been lifted across the globe, certain health and fitness apps have remained popular, with the category seeing a total of 1.4B downloads in 2022.

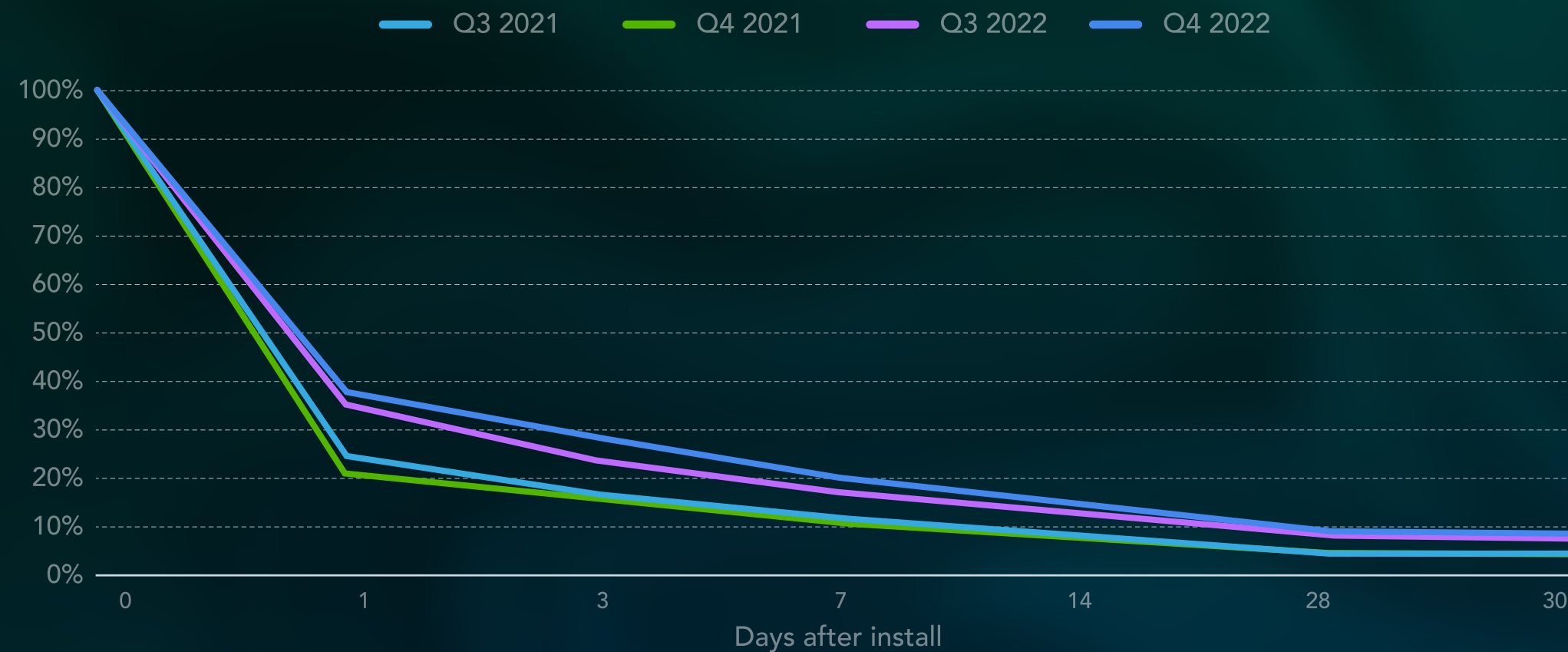
However, the number of installs in 2022 continued to slow down after the dramatic boost in 2020, which was caused by the lockdown. After the surge in Q2 2020, the growth rate slowed down with fluctuations. The decrease in growth can be attributed to the return of in-person activities.

## Quarterly downloads by app store

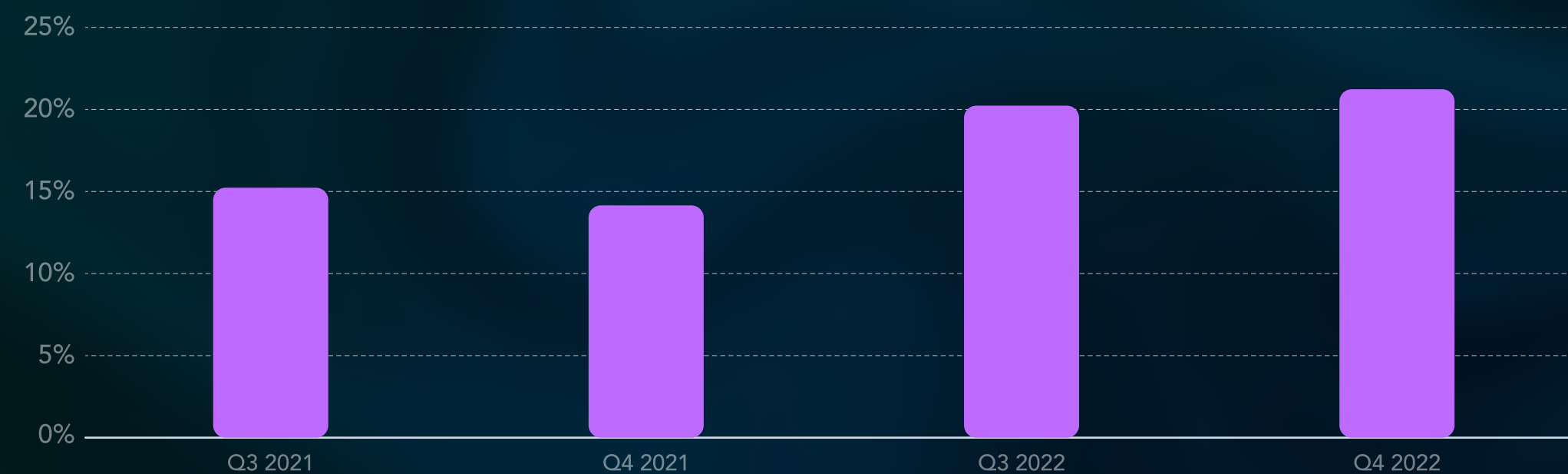


Download estimates are the aggregate installs of the top Health & Fitness apps worldwide according to Sensor Tower's data

## Health & Fitness App retention rates H2 2021 vs. H2 2022 (Global)



## Health & Fitness App stickiness H2 2021 vs. H2 2022 (Global)



We have to consider that 2022's decline is seen when compared to a year of huge growth for the vertical, which had already followed on from a year of unprecedented growth. The COVID-19 pandemic had an astronomical impact on health and fitness apps across the globe as lockdowns and social distancing restrictions meant not only that people couldn't attend the in-person fitness and wellness space and classes they'd previously been going to, but that people were looking for any and all means of indoor entertainment. Budgets were also freed up from canceled classes and gym memberships.

Despite this drop off in installs, the first positive signals can be seen when we look at sessions, which remained remarkably consistent and even managed to increase by around 1%. They're also up by another 1% so far in 2023 compared to Q4 of 2022. This demonstrates that a large number of users acquired during the install-boom have been retained, and that those who are currently being acquired, are more active and are likely higher-LTV overall. This is confirmed when we look at retention rates and stickiness. While Day 1 retention rates in Q3 of 2021 sat at an already healthy 25%, Q3 of 2022 was at 35%. For Q4 2021 this number was at 21% and a year later by Q4 2022 had reached a huge 38%. It's not always pure volume that's the most important metric to measure.

We see this reflected in stickiness as well. Where the median stickiness rates for health and fitness apps in Q3 and Q4 of 2021 were 15% and 14%, respectively, this rose to 20% for Q3 2022 and 21% for Q4 2022.

**Alexandre Pham**  
Vice President, EMEA

ADJUST



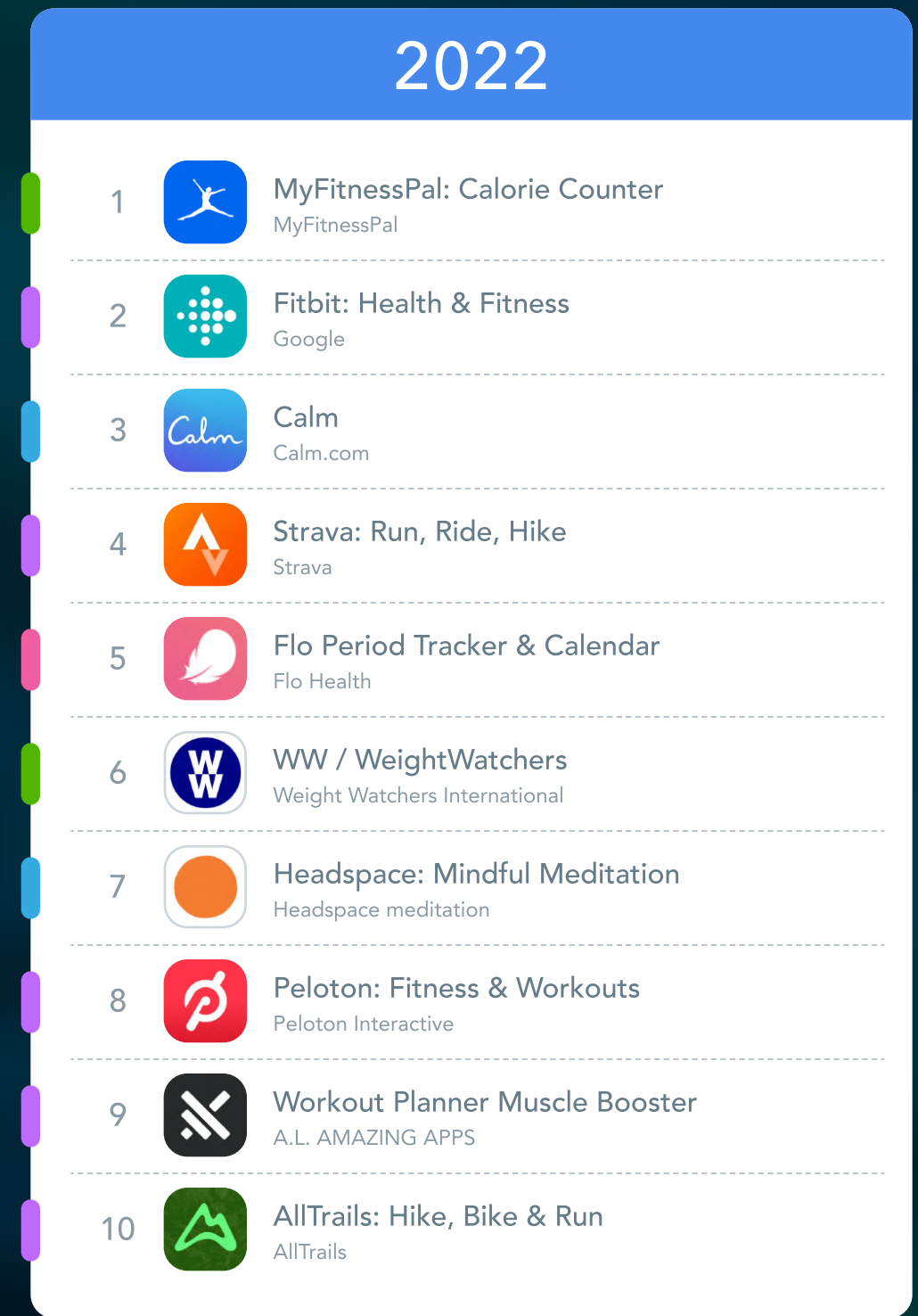
# TOP HEALTH & FITNESS APPS WORLDWIDE BY REVENUE

The top-grossing Health & Fitness apps in 2022 reflect a growing trend toward personal health and wellness management. These apps offer a range of features and services, from calorie counting and workout planning to meditation and period tracking.

Meditation apps are also gaining popularity globally, reflecting a growing interest in mindfulness and mental wellness. Apps like Calm and Headspace: Mindful Meditation provide users with guided meditation sessions, sleep aid features, and stress-reducing exercises. With people increasingly seeking ways to manage stress and anxiety, these apps offer a convenient and accessible way to incorporate meditation into their daily routines.

The pandemic has also highlighted the importance of mental wellness and the trend towards using meditation apps is expected to continue to grow in the coming years. With the increasing trend for artificial intelligence and machine learning, it is likely that this category of apps, as well as the entire Health & Fitness vertical, will become even more personalized and tailored to the individual user's needs and preferences.

Strava: Run, Ride, Hike and AllTrails: Hike, Bike & Run are two apps that have gained significant popularity in the post-lockdown era due to their focus on outdoor activity tracking. With people spending more time outdoors and engaging in activities like hiking, biking, and running, these apps provide users with a comprehensive database of trails and routes to explore, as well as the ability to track their progress and compete against others. As people continue to spend more time outdoors, these apps are likely to remain popular and evolve to meet the changing needs of their users.



■ Diet & Nutrition      ■ Fitness  
■ Meditation & Sleep      ■ Women's Health

App Store and Google Play



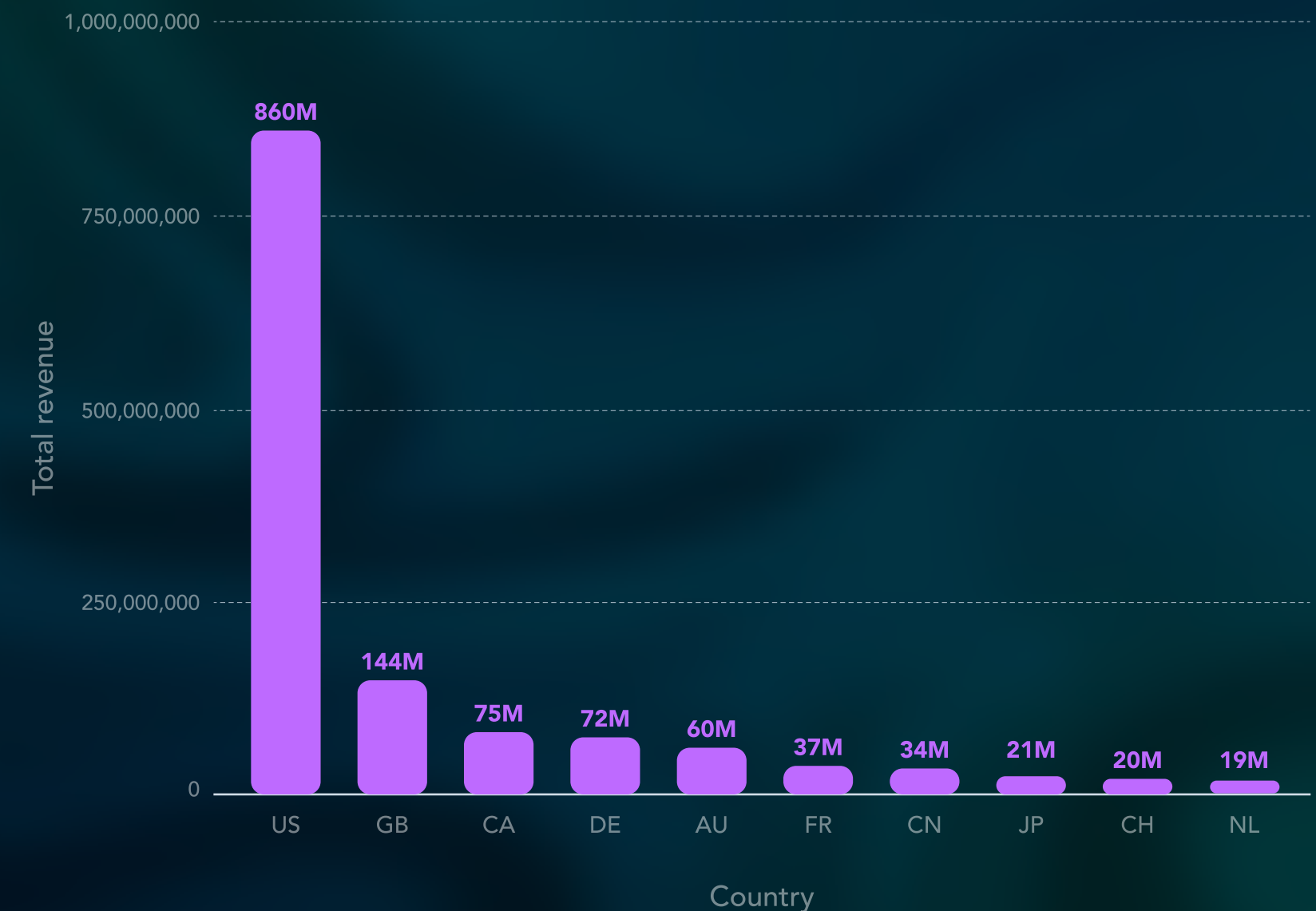
The significant factors that led to these countries becoming the top 10 in grossing for apps across the Health & Fitness app vertical were the market size and penetration of smartphones. The United States, China and Japan are the largest economies in the world, and their populations are among the largest as well. As a result, they had a larger potential market for Health & Fitness apps due to the higher adoption rate of smartphones.

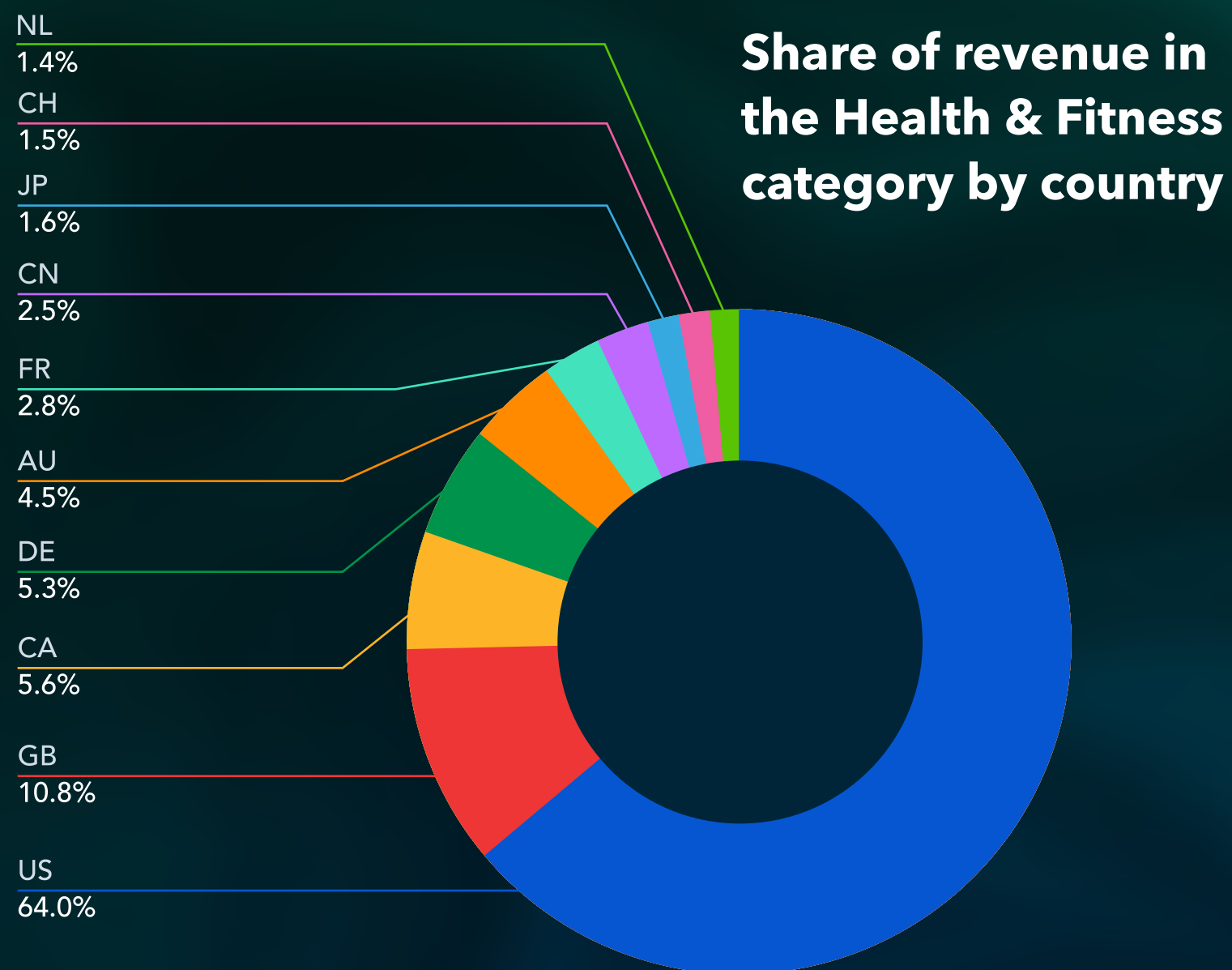
Countries such as Australia, Canada, and the United States have a relatively high level of health consciousness and fitness culture. People in these countries prioritize their health and fitness, which translates to a higher demand for Health & Fitness apps.

Wealthy countries such as Switzerland, the Netherlands, and Germany have high disposable income levels, making it easier for people to spend money on Health & Fitness apps and related services.

Lastly, government policies and regulations also played a role. Countries such as France and Japan have policies that encourage healthy lifestyles, such as mandatory health checkups and incentives for employers to promote employee wellness. This could lead to higher demand for Health & Fitness apps as people seek to improve their health and meet regulatory requirements.

## Total revenue in the Health & Fitness category by country





The top-grossing countries in the Health & Fitness app vertical in 2022 likely owe their success to a combination of factors, including a larger potential market, higher demand for Health & Fitness apps, high disposable income levels, and government policies promoting healthy lifestyles.

Virtual coach structure is one of the most recent trends in fitness apps. Health and fitness enthusiasts can get personalized workout guidance and advice from virtual trainers. It appeals to people who canceled their fitness membership after the pandemic and began a more mobile lifestyle.

The latest advancements, such as wearable technologies, AI, and machine learning, have enhanced health and fitness apps. Wearables motivate users to achieve tremendous success than they did the day before by tracking their goals and progress and inspiring them to become healthier, faster, and more robust. As a result, those users search for a health and fitness app that supports wearable technology and allows them to personalize their app journey.

**Selin Oger**  
Senior Account Manager  
**AppSamurai**

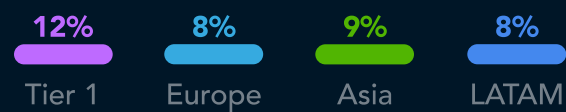




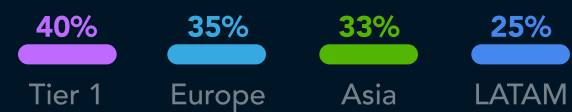
# Health & Fitness Benchmarks 2023

Countries in Tier-1 boast a more affluent audience, advanced digital infrastructure, greater payment options, and a widespread acceptance of subscriptions. As a result, this tier of countries has a higher conversion rate to both free trials and paid subscriptions.

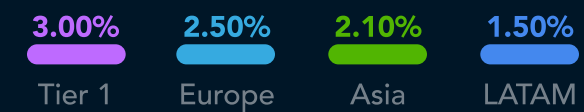
## Install to trial Conversion rate



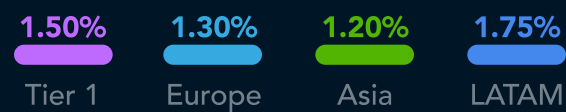
## Trial to Subscription Conversion rate



## Install to Direct Subscription Conversion rate



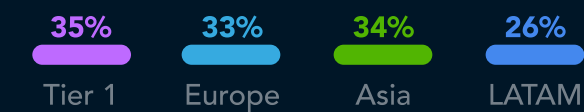
## Click - Through Rate



## Lifetime Value per paying user



## Install Rate



In general, the click-through rate of creatives tends to be higher in younger markets due to lower competition and consumer experience. When it comes to Asia, however, creating a successful ad creative can be more challenging due to unique cultural and perceptual factors that may affect how users respond to different types of creatives.

Health & Fitness apps often feature regional pricing that varies from high in Tier-1 countries to low in Tier-3 countries. Extended subscriptions are more common in Tier-1 and Tier-2 regions which results in higher LTV.

In the LATAM region, the Health & Fitness vertical is known to perform well, especially in Brazil. The combination of cultural attitudes, limited access to traditional fitness facilities, increasing smartphone penetration, and a growing middle class are some of the key factors contributing to the high LTV of Health & Fitness apps in the LATAM region.

The Install Rate is primarily determined by the quality of the ASO localization and how well an app store page aligns with the creative, making these two factors closely related.

# SEASONAL HEALTH & FITNESS APP BENCHMARKS

During the summer season, a high-priced paywall that provides a high LTV is predominant. However, during other seasons, it is more advantageous to use a lower paywall with a 7-day subscription. Due to the higher conversion rate, this strategy provides a good ROAS.

In the low season, we can get a lower CPM, which means that we can show ads to a larger audience for the same amount as during the high season. On the other hand, the high season gives us a higher subscription conversion rate, and we can offset the cost by bringing in "expensive" users with high LTV.

In contrast, in December, we see the opposite situation: an overheated auction with the highest CPM (especially in Tier-1 countries during the pre-holiday period) and a low season for fitness. Therefore, a more inexpensive paywall with a weekly subscription works better in the post-holiday winter season.

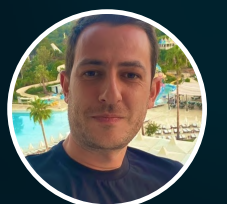
The fitness app market has been rapidly growing in recent years, and this trend is expected to continue in the near future. The COVID-19 pandemic has played a significant role in accelerating this growth, as traditional gyms have had to close down, forcing consumers to rely on virtual fitness options. Consequently, the market has seen a rise in both app downloads and subscriptions, which has contributed to its overall expansion.

According to [Adapty's](#) data, we are seeing several trends:

- The price of subscriptions is increasing. The price of weekly plans tripled in the fourth quarter of 2022, and monthly subscriptions are also following this trend, however at a slower pace.
- Annual subscriptions generate almost half of the revenue for Health & Fitness apps, with monthly subscriptions coming in at a close second.
- More and more apps are offering individual plans for diets and workouts. Given that the vast majority of users cancel their subscriptions after the first two months, an individual approach could be an effective way to retain users.

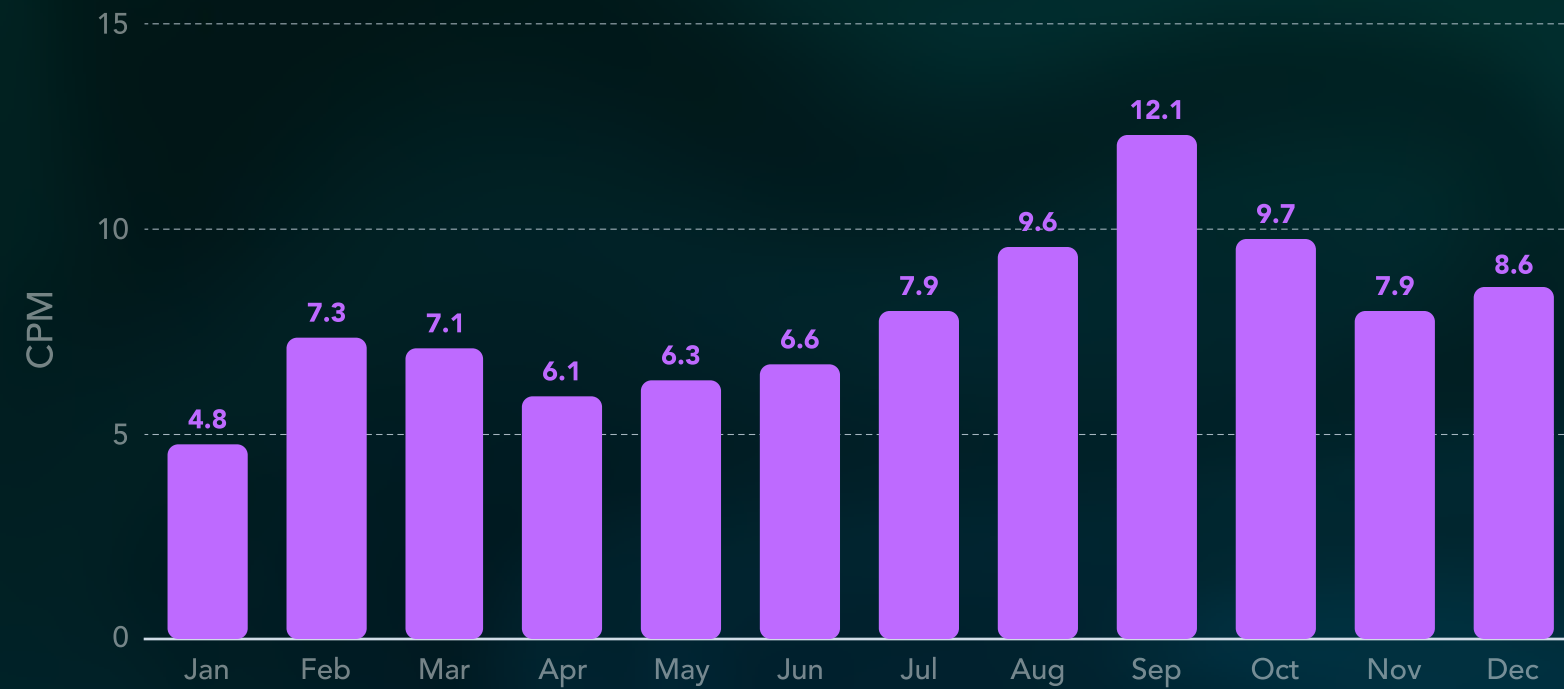
**Murat Menzilci**  
Community Builder

 adapty

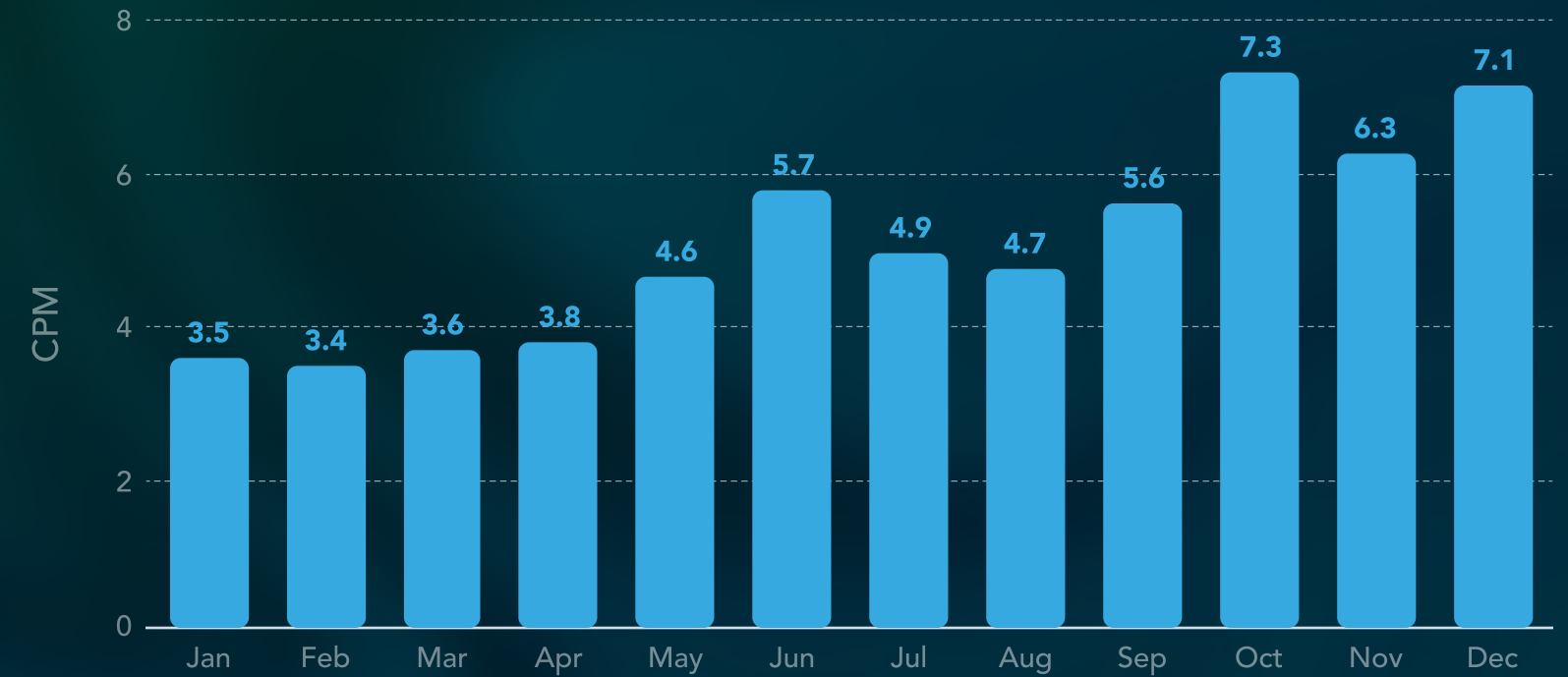


# Seasonal Health & Fitness Benchmarks by region, 2022

## US



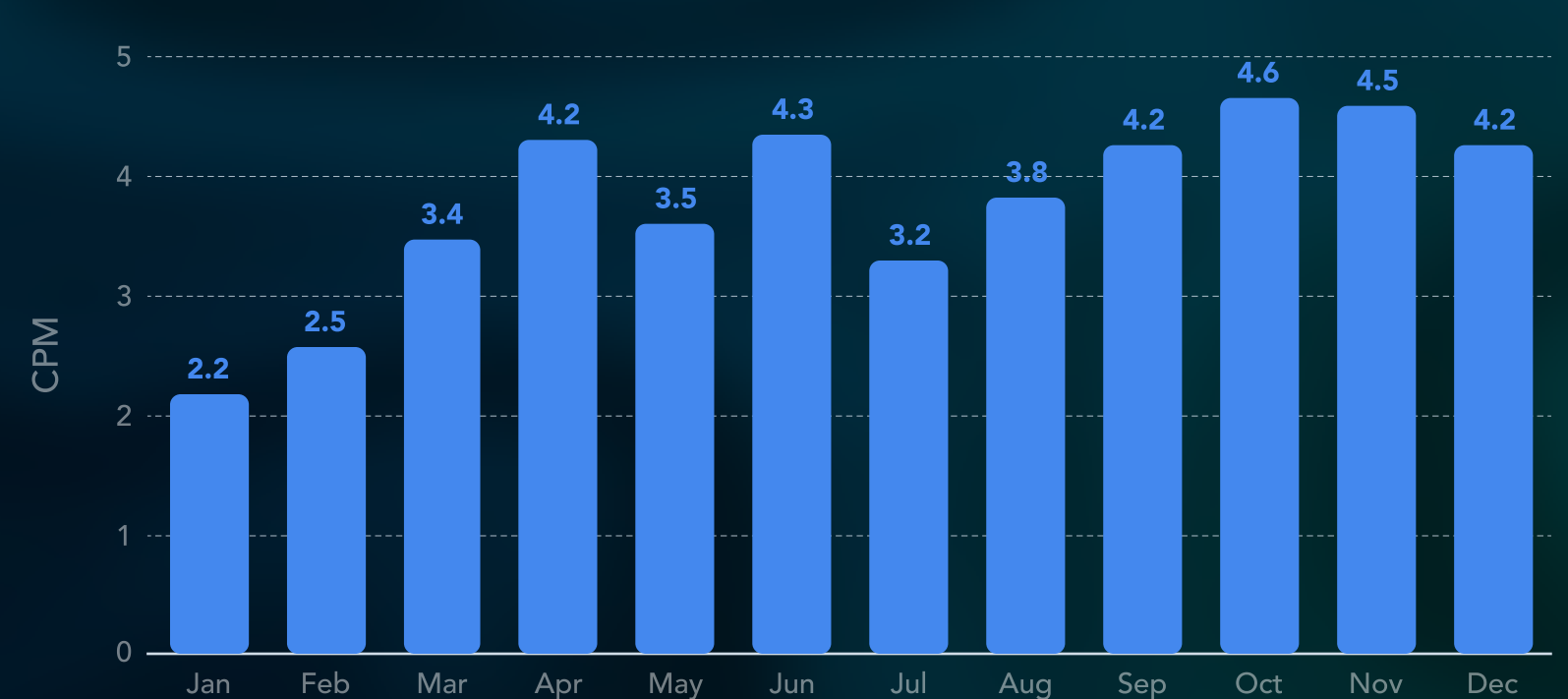
## EU



## LATAM



## Asia





# OPTIMIZATION BENCHMARKS

To effectively measure your performance, it's recommended that you compare your statistics with app retention benchmarks specific to your industry. Additionally, it's important to expand your analysis to the wider mobile market to gain a comprehensive understanding of your app's performance.

A value-based audience usually comprises of financially capable individuals, which results in a higher CPM. However, this is usually offset by a higher conversion rate into a direct subscription. Although the value audience tends to be smaller than the app event optimization audience, it's still essential to work with both audiences simultaneously. At larger volumes, relying solely on the value audience can result in audience exhaustion. Therefore, it's recommended to use setups that incorporate both audiences, such as Value Optimization – Worldwide and App Event Optimization – Tier-1 + Tier-2 in our campaigns.

	Direct Subscription CR	ARPPU	CPM	ROI
App Event Optimization	-17.20%	-2.86%	-20.03%	-2.41%
Value Optimization	21.04%	2.50%	26.71%	2.02%

Web-to-web, US, 2022

\*The values are displayed as percentage changes from the average value for the year.

All in all, it's essential that marketers and developers in this space, and the mobile marketing industry at large, pivot to better suit the current needs of their users and potential new users. By thinking about the experiences they're seeking within their contexts, which will always be market and region-specific, we're able to build better UA campaigns and retention initiatives to ensure that we're finding the right users and doing everything in our power to provide them with the experiences needed to drive LTV. The best way to unlock this potential is to move toward centralized data for quick, confident decision-making around budget allocation and which campaigns to scale. The numbers are starting to normalize overall, with installs for Q1 2023 up 2% compared to Q4 2022, hooray!

**Alexandre Pham**  
Vice President, EMEA

**ADJUST**



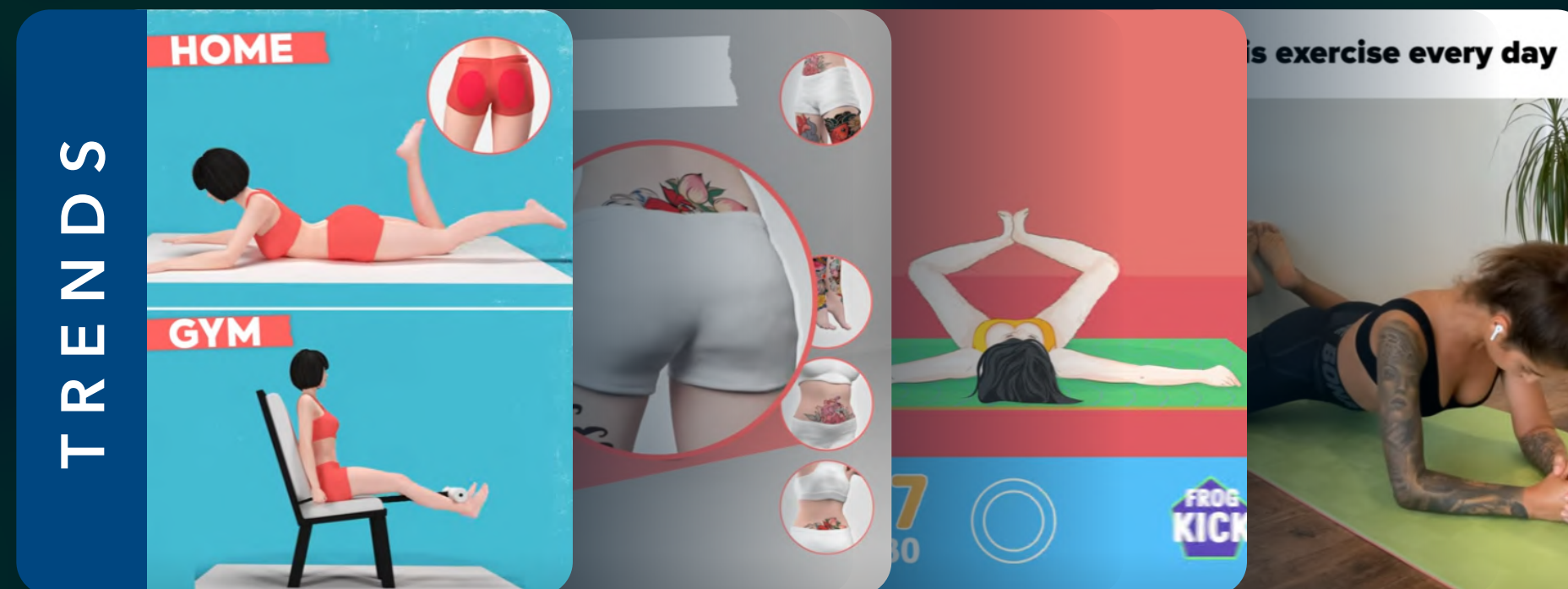
# CREATIVE TRENDS

In 2022, the marketing metrics for Health & Fitness apps revealed that users preferred user-generated content (UGC) style ad creatives over other formats. Among the various ad approaches that emerged as particularly effective in promoting fitness apps, there are three noteworthy ones.

Firstly, demonstrating simple and achievable exercises has proven to be an effective approach. Users respond positively to ads that show them easy-to-follow workouts that can be done at home or with minimal equipment. This approach is especially useful for beginners or those who are just starting out with their fitness journey.

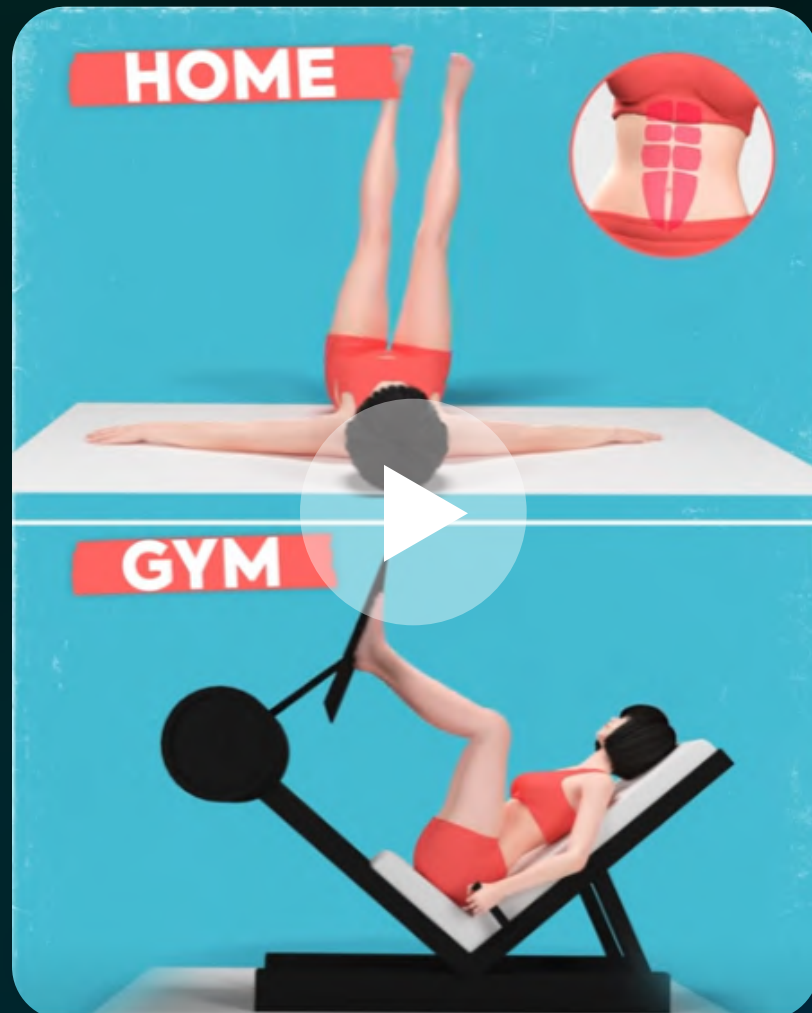
Secondly, gamification is another successful approach to promoting fitness apps. By incorporating game-like elements, such as rewards and challenges, into workouts, users are more likely to engage with the app and stick to their fitness routines. This approach helps to make workouts more enjoyable and less daunting.

Lastly, featuring real people in good physical shape has also been an effective marketing approach for fitness apps. Users tend to be inspired by real success stories, and seeing people who have achieved their fitness goals can motivate others to do the same. This approach also helps to build trust and credibility for the app.





## Home and Gym Comparison

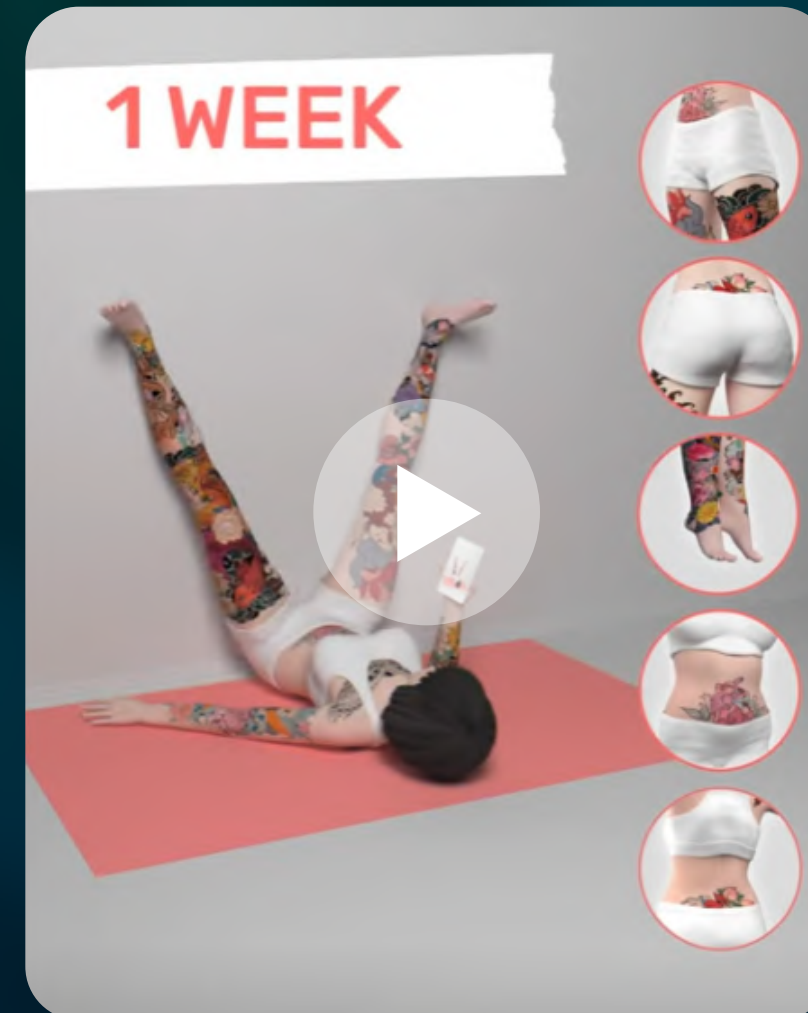


There are three primary ideas conveyed in this creative:

- exercising at home is entirely feasible
- working out at home can enable you to attain the same objectives as you would in a gym
- there are simple and easily achievable exercises available for various muscle groups

Therefore, the overall main message is the simplicity of using the mobile app at home if you want to achieve the same result as in the gym, with professional fitness equipment.

## Simple exercises near the wall

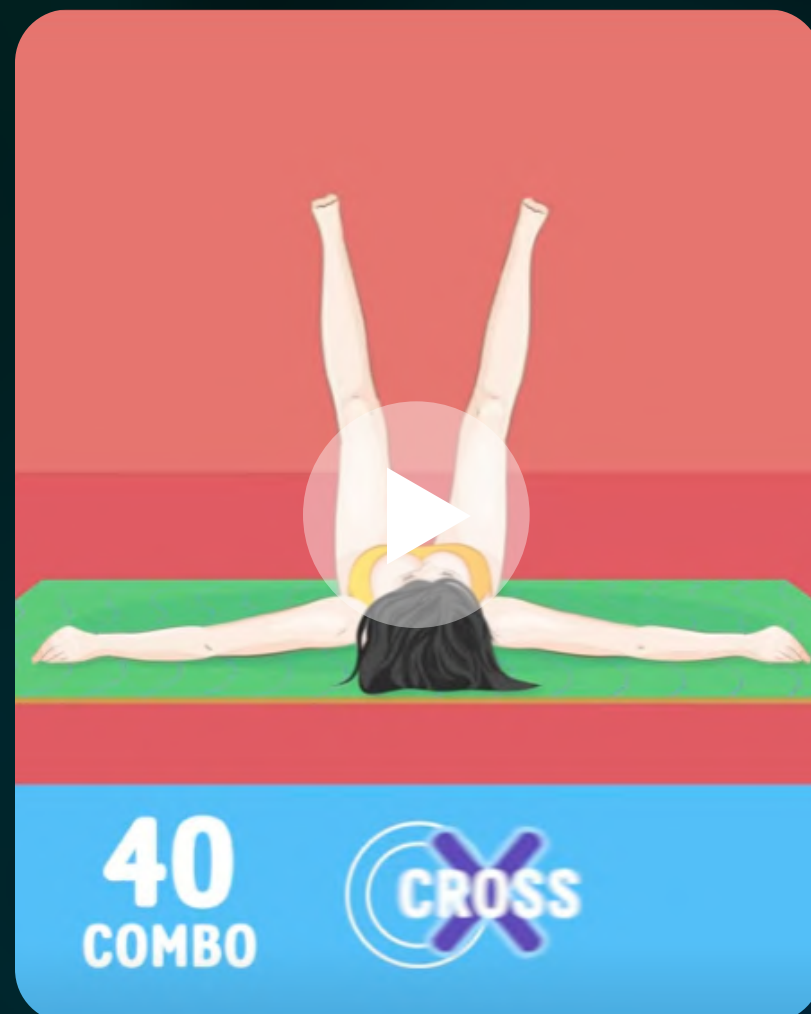


This creative stands out for its simple approach. All goals are presented in a single frame, making them easily attainable and understandable.

The exercises demonstrated are straightforward and can be performed by users of all levels of physical fitness.

Again, simplicity is the key.

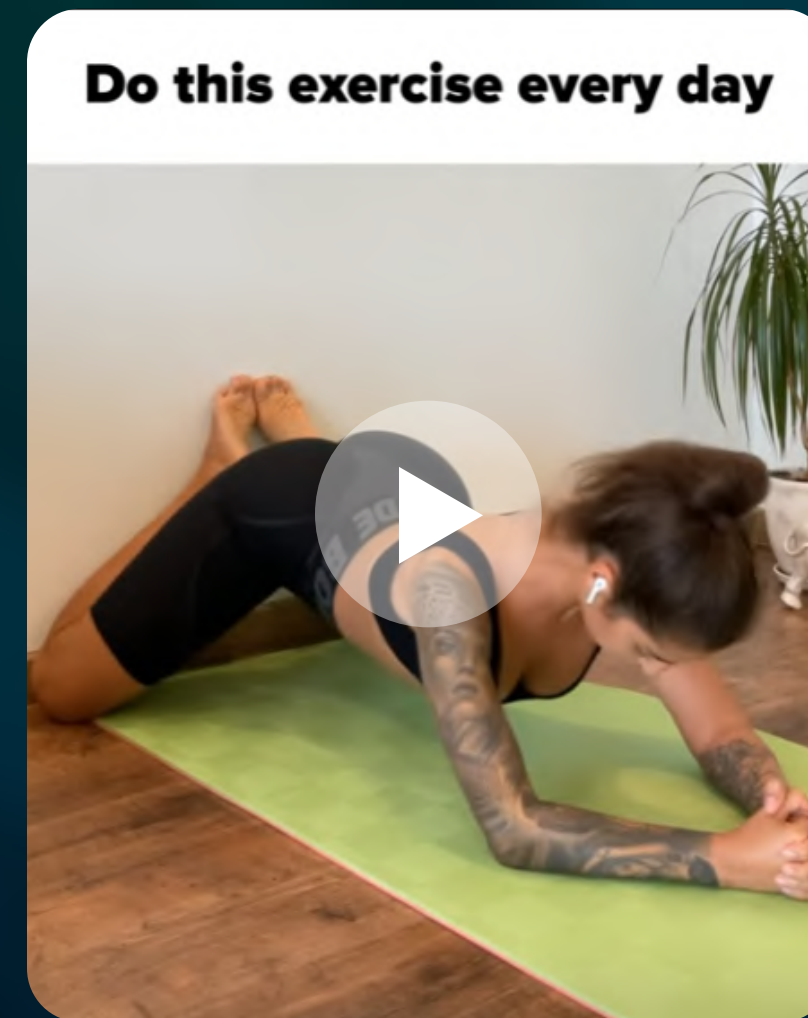
## Gamification



With this ad video, we show instructions and recommendations in an accessible format, making it suitable for anyone who is motivated to achieve their fitness goals.

A game-like approach to exercise makes it more engaging and easier to understand. The ad offers a more simplified and fun process of working out which may often seem repetitive and monotonous.

## UGC-like ads



Currently, the most effective creatives feature real people in good physical shape, which motivates users to take care of themselves.

The creative is designed to feel like advice from a user rather than an advertisement, while the goals and results are made clear.

In this video, we give the idea that the exercises can be performed easily at home with minimal equipment which makes the app accessible to a wide audience.



# TOP USER ACQUISITION STRATEGIES

## Audiences

Ad Budget distribution by audience:

- 60% - broad audience
- 25% - interests in Fitness / Pilates / Health & Wellness / Healthy Diet
- 10% - lookalike value-based and volume-based audiences
- 5% - Retargeting

Note regarding retargeted users: we will display new creatives to users who have downloaded the app within the past month and have not yet made a purchase. Additionally, we will direct these users to a landing page offering an extra incentive, such as a discount on a subscription.

## Top GEOs for the Health & Fitness apps

Tier-0 – US

Top Tier-1 countries – CA, AU

Top Tier-2 countries – ZA, IT, PL, SA, AE

Top Tier-3 countries – MX, BR, TR, MY, PH

Here are a few insights on the health & fitness market we derived from Huawei's Data Management Platform:

- There 22% of our DMP audience tagged as "interests in Health/Wellness products", based on 730 million of our monthly active smartphone users.
- More than 75% of the audience is between 18-45-year-old.
- Nearly 60% are male, and 40% are female. And compared to the previous year, the proportion of females is gradually increasing.
- When we examine the app categories where our high-consumption user group spends, we find Fitness ranks the third highest behind Food & Beverage and News & Reading categories.

**María Ramiro**

Head of Ads Business Development



Petal Ads by Huawei



## Scaling

The most effective method to scale user acquisition for a Health & Fitness app is through vertical scaling, which involves launching multiple campaigns simultaneously with varying setups. Horizontal scaling can work with budgets up to \$20,000 per day.

However, one of the main challenges of scaling up and out is the potential for frequent ad rejection once creative volume exceeds \$30,000, regardless of whether or not it meets the traffic source's guidelines. One way to address this problem is to use partially unique creatives or frequently replace them with new ones. This can help reduce the risk of ad rejection when scaling up and out.

## Web-to-web

The web-to-web format has two major advantages: it provides flexibility in flow settings and doesn't require paying store commissions. This format is especially suitable for subscription-based apps that utilize quiz funnels. By using this format, subscription apps gain access not only to the app auction but also to a web auction, which can result in significant savings on app store commissions since payment is not processed through the app.

Another benefit is the increased flexibility when testing the flow. Additionally, the web-to-web format can work along with SKAD without any technical limitations with some exceptions.

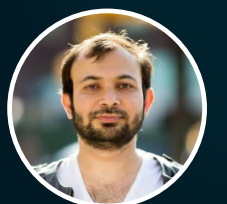
Marketers, app developers and ad tech companies have been increasingly accustomed to post-ATT marketing strategies. SKAN has been favorable to subscription apps because most trials happen in the first 24 hours after install, and increasing numbers of marketers are comfortable with it now. Platforms like Meta and TikTok have improved their performance with SKAN - and the resurgence of UGCs has further galvanized performance on TikTok.

Another driver of the growth is that users have also become much more comfortable with subscriptions - and there is far lesser of the subscription fatigue or wariness among users lately.

**Shamanth Rao**

CEO

**ROCKETSHIP HQ**  
Growth. Accelerated.



## Web-to-app

The main strategy that we recommend using for Fitness applications is worldwide targeting of a broad audience with language breakdowns. This strategy allows you to achieve the lowest possible CPM and makes it easier for the traffic source to optimize toward the most relevant audience. However, it is essential to remember to update the GEO blacklist in a timely manner.

The web-to-app format is more suitable for iOS apps and games with IAP monetization that, for some reason, cannot or do not want to purchase SKAdNetwork traffic.

## Buying traffic on weekends and holidays

Pay attention to the trends of the weekdays, as purchasing traffic for Health & Fitness apps during the weekends is almost always more cost-effective than during the week. Running mobile marketing campaigns during holidays can be crucial for success too, as the CPM is highest during the pre-holiday period, especially in Tier-1 countries. To offset the high cost, a more inexpensive paywall with a weekly subscription works better in the post-holiday winter season. By maximizing ad spend on days with low CPM and avoiding days with high CPM, it is possible to lower the average CPM per month and achieve a good ROAS.

## Alternative payment options on repeat paywall displays

This approach involves presenting users that have already downloaded an app with a variety of payment options and “enticing” them to take advantage of exclusive deals. For example, in the first display, users might be offered a yearly subscription, while subsequent displays could present them with the option to sign up for a quarterly subscription at a discount. By presenting users with different options and exclusive deals, you can encourage them to subscribe and increase your conversion rates.

## Twitter's Emergence as a Powerhouse for Acquiring Health & Fitness Users

Twitter has emerged as a valuable platform for user acquisition. With its real-time nature and the ability to connect with potential customers through relevant hashtags and conversations, Twitter has been particularly effective in the Health & Fitness vertical.

Recent data from AdQuantum’s UA campaigns shows that Twitter's popularity for user acquisition in fitness projects has been steadily increasing since 2022. This trend is continuing to strengthen in 2023 as more health and fitness brands recognize the value of using Twitter to reach out to fitness enthusiasts. By leveraging the power of Twitter's real-time conversations and relevant hashtags, brands can engage with their target audience and build lasting relationships. This, in turn, can help drive user acquisition and improve customer retention in the long run.



# KEY TAKEAWAYS

## 1 Increase in UGC-like creative share

In 2022, it was hard not to notice the surge in advertising creatives based on User Generated Content (UGC) across various app verticals. These creatives included both real and “pseudo” UGC. However, it's worth noting that the latter is not meant to deceive users, but rather to simplify the process of obtaining permission to use materials.

UGC-like content is especially popular in the Health & Fitness vertical, as it showcases the app's benefits through real-life examples, motivates users to achieve their fitness goals, builds trust, and delivers information in a clear and concise manner. Other creative formats struggle to fulfill all of these functions at once.

## 2 Expanding reach by attracting the less professional audience

A trend that emerged in fitness and wellness apps last year was the increase in the less professional audience of these apps. Fitness is becoming more accessible to everyone, regardless of their level of training or access to specialized equipment. Mobile apps are now offering a growing selection of programs and content tailored to sports enthusiasts, while advertisements are highlighting exercises, goals, and models that are relevant to this expanding audience.

## 3 Emerging markets beyond Tier-1

During the last year, the focus has shifted from Tier-1 countries to Tier-2 and Tier-3, such as Mexico, Brazil, Turkey, and African countries. The Philippines and Malaysia are also performing well, where a high ROAS is achieved due to low CPA costs. Arab countries such as Saudi Arabia, the United Arab Emirates, Qatar, and Oman have the highest LTV equivalent to LTV in the US, but also just as high of a CPA.

## 4 Localizing Health & Fitness Apps in Competitive Markets

As Health & Fitness apps are gaining popularity in markets beyond English-speaking countries, it is important for them to not only offer English language support but also localize their content in other languages such as Spanish, Portuguese, French, Turkish, and German. Offering localized content could be a crucial factor in gaining a competitive advantage and attracting more users.

## 5 Audience Diversity

We recommend using all types of audiences – Broad, Lookalike, Interest-based, and Retargeted – even within a single campaign. Incorporating a variety of audiences helps ensure the stability of ad campaigns over extended periods of time.

## **6 Incorporating new UA strategies, such as web-to-web**

If you are looking to buy traffic on both iOS and Android platforms, Web-to-Web would be the optimal solution. A well-crafted quiz displays a high rate of completion and thus results in a greater subscription conversion. Moreover, there are no third-party store commissions to pay.

## **7 Twitter's Increasing Popularity for User Acquisition in Health & Fitness Projects**

In recent years, Twitter has gained momentum as a platform for user acquisition. In 2022 and 2023 this trend has also expanded to the Health & Fitness vertical particularly. Its real-time nature and ability to connect with potential customers through relevant hashtags and conversations make it a valuable tool for reaching out to fitness enthusiasts.

In 2022, Twitter started to firmly establish its place among other platforms for user acquisition in Health & Fitness projects as well, and this trend is continuing in 2023.

## **8 The simplicity of Health & Fitness app ads is the key to higher conversions**

When producing ad creatives, it is important to keep in mind the target audience's needs and abilities. One aspect to consider is the level of complexity in any exercises or tasks presented in the content. If the exercise is too complex, it can discourage users from engaging with the content and potentially lead to a lower conversion rate.

On the other hand, if the exercise is simple and achievable, it can make users feel more confident and motivated to engage with the content, leading to a higher conversion rate. Therefore, it is essential to strike a balance between the difficulty level of the exercise and the user's level of understanding and expertise. By doing so, you can effectively lower the entry threshold and increase the likelihood of converting potential customers into actual ones.

## 9 Subscription prices go up

The Health & Fitness app market is currently witnessing an upward trend in subscription prices. Annual subscriptions seem to generate the most revenue. However, to retain users, providing individualized plans for diets and workouts could be more effective, considering that most users tend to cancel their subscriptions within two months.

Countries in Tier-1 are known to have a higher conversion rate for subscriptions due to a more affluent audience and a greater digital infrastructure. In addition, regional pricing and extended subscriptions in Tier-1 and Tier-2 regions have resulted in higher lifetime values.

To maximize returns on ad spend during different seasons, it is recommended to adjust paywalls and subscription options. While a value-based audience has a higher conversion rate, it can result in audience exhaustion. Hence, using setups that incorporate both value and app event optimization audiences can be beneficial.

Offering users various payment options and exclusive deals can also increase subscription conversion rates.

## 10 Installs of Health & Fitness apps are declining, while the retention rate continues to grow

Despite declining installs for health and fitness apps in 2022, the situation is more optimistic than it appears with a consistent increase in sessions and retention rates. It is important for marketers and developers in this space to pivot and better cater to the needs of their users while using centralized data for confident decision-making around budget allocation and campaign scaling. Install numbers are starting to normalize with a 2% increase in Q1 2023 compared to Q4 2022.

Health and fitness app developers now need to create an app that enhances the user experience and allows fitness enthusiasts to easily manage all of their activities with a high level of customization and compatibility with wearable technologies. As physical fitness centers adopt the post-pandemic world, they have started developing their apps and providing online fitness services.

Market growth is anticipated to be rapid, and competition will progressively rise. To be competitive, health and fitness apps must embrace the most recent technological developments and utilize the proper user acquisition channels to reach the right users at the right time.

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