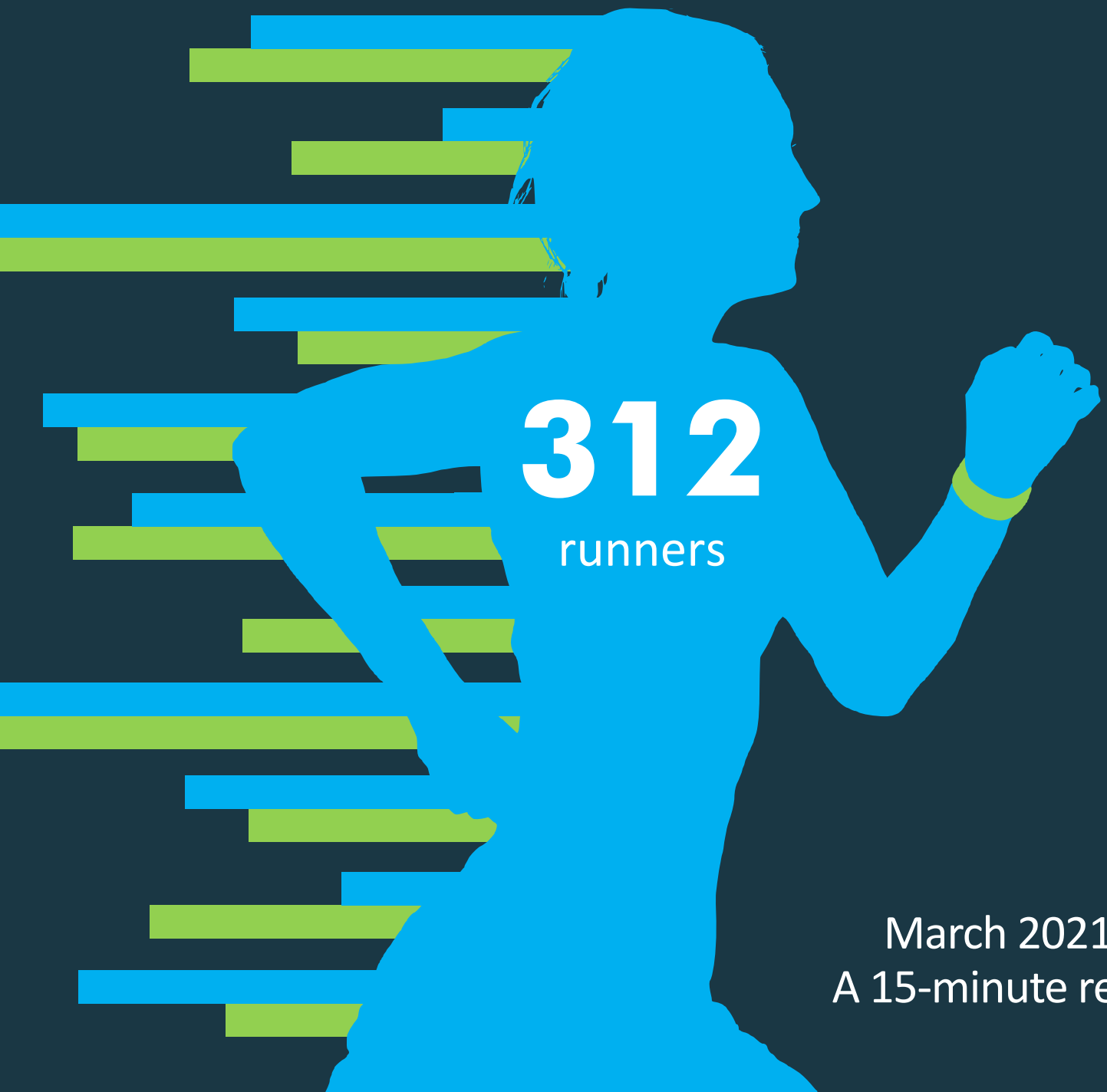
TRKR
INNOVATION & INSIGHT

Runners care about data, health and performance

A study of runners using wearables



March 2021
A 15-minute read

FOREWORD

TRKR Ltd were engaged by Myotest to get a better understanding of their target audience – recreational runners who use wearable technology to track, understand and improve their run.

The result was a robust, in-depth report on the general user behaviours, attitudes and motivations in this area.

The findings reveal key insights comparing the differences between those runners using a smartwatch, whose goals are more fitness-orientated, compared to non-smartwatch users, who are more focused on lifestyle gains (weight loss, etc.).

The report also highlights devices used by runners, including a ranking of smartwatch brands.

Finally, the same sample were introduced to a high-level proposition concept of Myotest's Digital Smart Coach for Runners. The overall response was extremely encouraging with 98% of smartwatch users saying they would use the running app/platform. In addition to this, 96% of runners who use a smartwatch said they would buy a wearable device because it included this app/platform.

From our experience of testing Tech propositions, this was the most conclusive response we've witnessed to date and certainly places the team at Myotest in a prime position to succeed with this target market.

TRKR
INNOVATION & INSIGHT

THE WHY,

NOT JUST THE WHAT.

www.trkr.co.uk

/company/trkr-insight

@TRKR_UK

175 Glasgow Road,
Edinburgh, Scotland, GB

WHO WE ARE

TRKR is an Edinburgh-based innovation & insight consultancy.

Our mission? To bring true insight into the heart of the innovation process, for all businesses.

Since 2016 the TRKR team has led or supported almost 150 innovation projects, across a variety of sectors and at various stages of development. For all the struggles, challenges, and pitfalls that clients face, two common issues persist:

- The lack of a structured process to follow
- A failure to bring customer insight and experience into the process, until it's too late

As a result, we created The TRKR Innovation Process - a step-by-step agile, design thinking method of bringing new products and services to market.

And, as an independent 3rd party, we test these new propositions with their intended target market. Robust feedback and insight from real customers.

As a result, we are able to help businesses to design, develop and launch new products & services that their target market actually needs, values and will pay for.

From Start-up to Corporate, we work with innovative businesses

Westfield Health
MERKLE
ENERGY INNOVATION CENTRE
FinTech Scotland
SMS
Royal Bank of Scotland
ParsleyBox
sopra steria
PODFather
arbnco
BrewDog
Money Dashboard
Beezer
HIGHLANDER Adventure Equipment Since 1985
xlgroup
adimo
previse
Accolade Wines
QUINTESSENTIAL BRANDS GROUP
thinkWhere
myotest
Noveto Systems Ltd
ENERSOFT INTERNATIONAL
thingco

CONTRIBUTORS

TRKR Team | Insight and analytics

Carey McEvoy
Director

Mark Thomson
Director

Floraidh Soutar
Data Analyst

Our team brings expertise and enthusiasm to our clients, bringing their teams with us rather than "telling them".
We believe strongly in collaborative consultancy,
and we'll care as much for your new venture as you do.

External Contributor | Report editing, design and illustrations

Stephanie Arreguit O'Neill
Innobridge Services
stephanie@innobridge.com

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OVERVIEW OF

THE STUDY

OBJECTIVE & METHOD

Gather insight
and test Myotest's proposition
through an online survey with
Californian runners who
use a tech device to track
and analyse their workouts

THE STUDY

March 2021
California
Runners who use wearables

30
questions

312
respondents
including

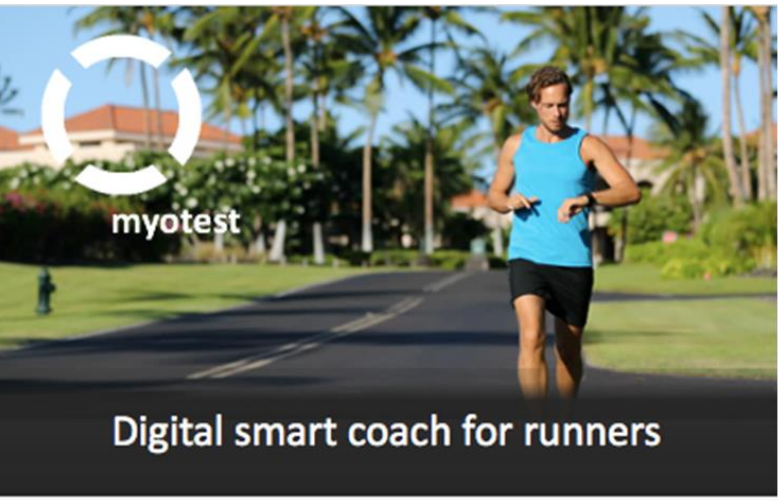
240
smartwatch users

72
non-smartwatch users

THE VALUE PROPOSITION: myotest

Digital running coach from the smartwatch

Tapping into the power of biomechanics to unlock a runner's full potential



Tracking advanced measures such as asymmetry, contact time and stiffness to improve performance and avoid injuries

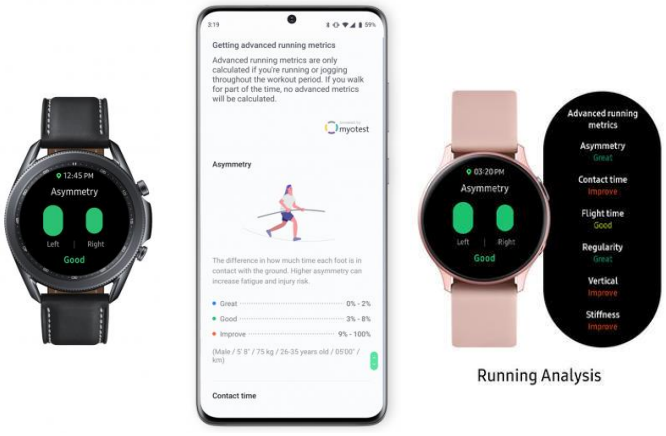
Fine-tune your running technique

One device, nothing else needed

Live coaching in real time

Personalised running shoe suggestions

MyoRUN™ features are available in Samsung Galaxy Watch3 and Active2 since 2020



Running Analysis

SAMSUNG

Images: Samsung

KEY INSIGHTS

MOTIVATIONS

The Top 3 running goals for smartwatch users

56%
Get or maintain level of fitness

45%
Lose or maintain weight

40%
Target distance per week/month

What's most important to you about **using a wearable device** when running?
(Top 3 for all respondents)

COMFORT when running (57%)

RELIABILITY of the device (45%)

ACCURACY of metrics (39%)

What's most important to you when **using a running App/platform**?
(Top 3 for all respondents)

TRACKING progress (47%)

EASY TO USE and understand (41%)

IMPROVING my running technique (35%)

Would you use this running app/platform? (MyoRUN™)

98%
of smartwatch users

97%
of non-smartwatch users

said yes

Would you buy a wearable device because it included this app/platform? (MyoRUN™)

96%
of smartwatch users

92%
of non-smartwatch users

said yes

"It is very good"

"One of **best health products**"

"It's very helpful to track my run"

"Quality and constant **innovative** technology"

"It is **very helpful attaining specific goals**, running analysis and more"

Feedback from Samsung Galaxy Watch3 and Active2 users for Advanced Running Analysis

The findings of the survey validate the proposition of MyoRUN™ and aid the Myotest team in understanding the needs of their existing and potential future customers.

CONTEXT

MEASURING TO IMPROVE

How runners use technology in 2021...

Data is the first step to understanding. Today's runners have understood this clearly, turning to technology and wearables to measure, track and record their runs. With devices ranging from phones to smartwatches, pods or even tech imbedded into running shoes, there are diverse options to choose from to gain insights into how we run and how we can get better.

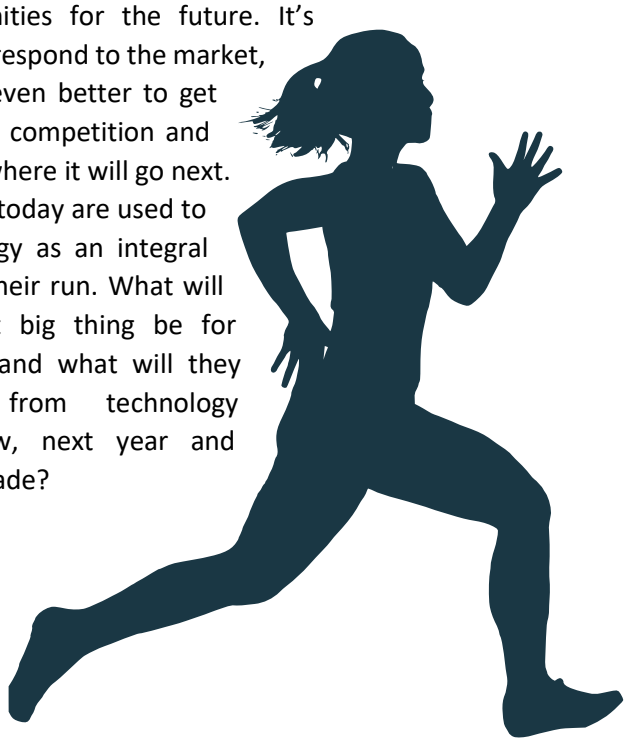
For companies, data is also the key to creating value for their end users. In the case of Myotest, a Swiss company that taps into the science of biomechanics to provide valuable insight and advice for runners through sport wearables, it is crucial to get a clear understanding of what end users expect from the product. Aligning business and design decisions with the needs and desires of users is essential.

So what is the best way to get to know users better? Well, that depends on what you're looking for, but one tried and true way is to go directly to your target group and start asking carefully chosen questions. A quantitative study such as the one in in this report is a useful way to evaluate your company's value proposition. It will let you know if what you have works for your target... or if you need to take on a new direction to better answer to their needs.

In the case of Myotest, the target is clear: runners who use wearables, in particular smartwatches, to capture their running metrics, track their progress and reach their goals. For the survey to serve its purpose, we need to get a clear understanding of not only how people use technology for running, but also why.

...and what they want from it tomorrow

Beyond evaluating your company's value proposition, a good survey will help you identify opportunities for the future. It's great to respond to the market, but it's even better to get ahead of competition and predict where it will go next. Runners today are used to technology as an integral part of their run. What will the next big thing be for runners and what will they expect from technology tomorrow, next year and next decade?



ABOUT MYOTEST

www.myotest.com
info@myotest.com

Tapping into the power of biomechanics to unlock a runner's full potential

Founded in 2004, Myotest is a pioneer in the capture, analysis, and interpretation of biomechanical metrics. The company started out creating hardware solutions to help athletes improve their physical abilities and avoid injury, eventually moving into creating a full software solution for runners: MyoRUN™. Capturing key biomechanical metrics such as cadence, asymmetry or undulation from any wearable (e.g. smartwatch, earbuds), MyoRUN™ provides live coaching to help runners improve their form, increase their performance, and look after their health. In 2020, this running solution was licensed into Samsung's Galaxy Watch3 and Active2, providing millions of users with access to advanced running metrics. Myotest also offers MyoSHOE™, which identifies the running shoes that best suit a runner's needs according to biomechanics.

Today, the company is looking to improve its offer for runners and expand its solutions to other sports and activities. This endeavour starts with learning more from their end users.

OBJECTIVES OF THE STUDY

Myotest centres its design philosophy on the end user and licenses its technology to wearables manufacturers. With the 2020 release of Samsung's Galaxy Watch3 and Active2, Myotest's technology has been made available to millions. Looking to the future, Myotest wants to gain a better understanding of its target users, to gauge the reactions of those who have discovered their offer in Samsung, and to decide where to go next with their technology. This is the opportunity for Myotest to refine their existing proposition and to explore new avenues for growth and investment.

To generate the strongest possible value proposition, the team wants to explore and understand:

- the habits and behaviours of runners using wearables,
- the attitudes and perceptions to runners' existing wearables' software,
- the desires and expectations that runners have when using wearables.

To support this, TRKR gathered general category insight and tested the proposed app/platform proposition at concept level through a 30-question online survey conducted in March 2021. 312 Californian runners who use a tech device to track their runs answered our questions, providing insight into their running habits and needs.

SECTION 1

TARGET GROUP

Recreational runners who use a tech device to track their runs

312

respondents located in California, including

240

Smartwatch users (77%), 75% of whom have at least 2 different smartwatches, and

72

non-smartwatch users (23%)

312 runners

240 smartwatch users 77%

Smartwatch brands

- Apple Watch (142, 59%)
- Fitbit (67, 28%)
- Samsung Galaxy Watch 3 or Active 2 (30, 13%)
- Amazfit Bip (24, 10%)
- Other Brands (73, 38%)

Other Wearable Devices

- Smart Phone (107, 45%)
- Ear Pods (102, 43%)
- Specific Running Watch (66, 28%)
- Running Pod (51, 21%)
- Other Accessory (10, 4%)

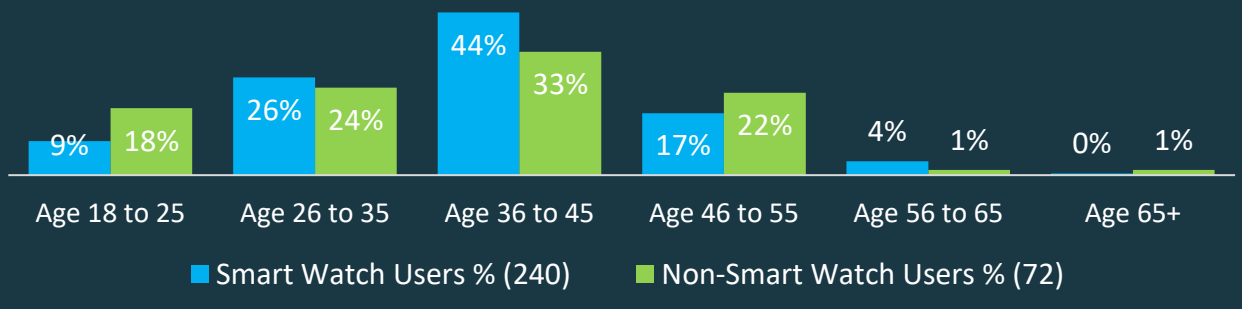
72 non-smartwatch users 23%

Wearable Devices Owned

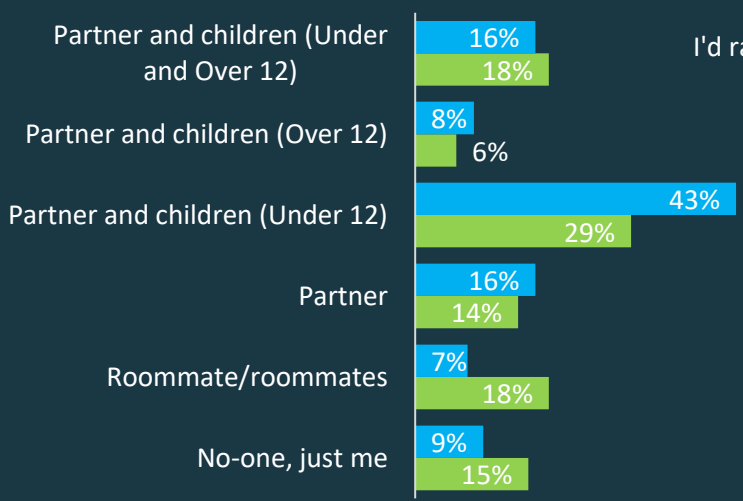
- Smart Phone (45, 63%)
- Ear Pods (31, 43%)
- Specific Running Watch (23, 32%)
- Running Pod (10, 14%)
- Other Accessory (7, 10%)

Demographics

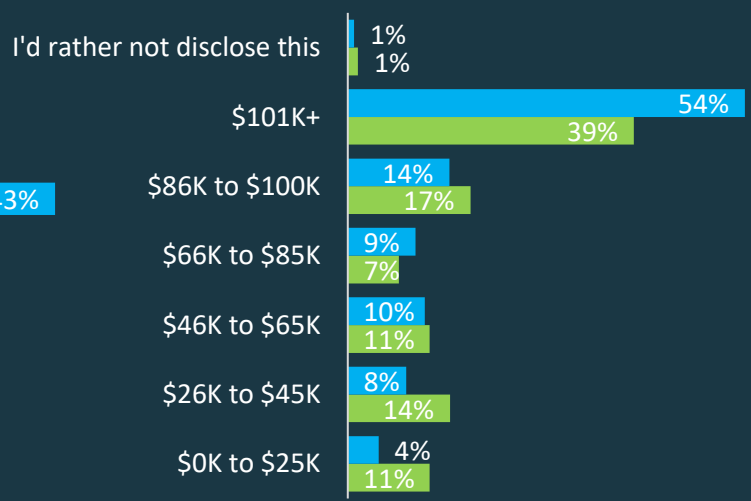
Age profile



Presence of children



Household income p/a



SECTION 2

BEHAVIOUR AND ATTITUDES TO RUNNING

Motivations

The top 3 running goals for smartwatch users

56%
Get or maintain level of fitness

45%
Lose or maintain weight

40%
Target distance per week/month

To get a better feel for what motivates runners, we asked respondents what goals they have in mind while running. Smartwatch users' goals are more fitness-orientated, whereas non-smartwatch users are more focused on weight (56%), with fitness coming in second (33%). Non-smartwatch users were also more interested in achieving a certain number of runs per week or month (25%) rather than reaching a specific target number of miles (18%). When asked why they run, respondents also gave importance to factors such as feeling good, mental well-being and enjoying the outdoors. Smartwatch users also run as part of a fitness regime for another sport (20%) more than their counterparts (7%).

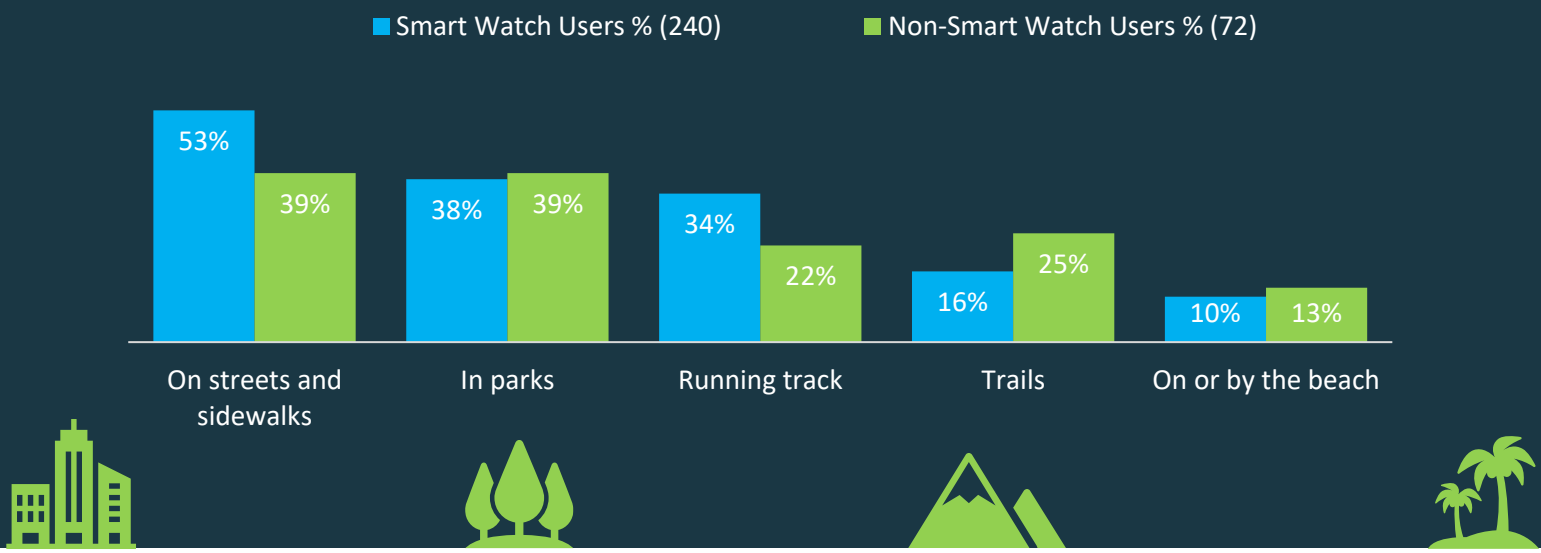
Frequency & Distance

51% of smartwatch users | **36%** of non-smartwatch users run every day.

Smartwatch users typically run every day (51%). Non-smartwatch users have a higher spread across frequency of running, with 36% running every day, 36% running 4-5 days a week and the rest running at lower frequencies. The most common distance is 2-3 miles per run for both smartwatch users (48%) and non-smartwatch users (51%).

Terrain

The most popular place to run is on streets and sidewalks (53%), though less so for non-smartwatch users (39%). Regionality informs the responses – the majority of smartwatch users are in LA, though non-smartwatch users are more spread out across California, with the majority in the San Francisco Bay area.



Share of all respondents that practice...

Other Sports & Activities

Walking 46%

Swimming 36%

Basketball 33%

Football 31%

Fitness/gym 28%

Hiking 27%

Soccer 26%

Golf 24%

Tennis 27%

Baseball 21%

Weight training 19%

Road biking 14%

Mountain biking 11%

Altogether, smartwatch users are more involved with other sports/activities than non-smartwatch users. Non-smartwatch users are more inclined towards low-impact/less aerobic activities like walking (39%), hiking (28%), and weight training (21%).

SECTION 3

FOCUS ON WEARABLES WHILE RUNNING

Devices & Apps

Turning the questions to the use of devices for running, we learned that smartwatch users use more wearable devices than non-smartwatch users, who mostly rely on their smartphone attached to their arm (63%). 45% of smartwatch users also make use of their phone. The most owned smartwatch brands among our respondents were Apple Watch (59%) and Fitbit (28%).

As Apple Watch and Fitbit were the most used smartwatches, Apple Health App (47%) and Fitbit Coach App (29%) were the most used supporting Apps. Map-tracking apps Run Tracker (23%) and Nike Run Club (20%) also proved popular.

The next step to better understanding our respondents and their needs is to figure out their priorities.

What's most important to you about **using a wearable device** when running? (Top 3 for all respondents)

COMFORT
when running
(57%)

RELIABILITY
of the device
(45%)

ACCURACY
of metrics
(39%)

All factors are more important to smartwatch users than non-smartwatch users, mainly Comfort (61% vs. 43%). Non-smartwatch users find Connecting to Their Music the tied-second most important factor at 35%.

What's most important to you when **using a running App/platform**? (Top 3 for all respondents)

TRACKING
progress
(47%)

EASY TO USE
and understand
(41%)

IMPROVING
my running technique
(35%)

Non-smartwatch users are less inclined to want to Improve their running technique. However, they valued connectivity with friends (22%) and benchmarking against other runners (19%) higher than smartwatch users (16% and 9%, respectively).

Is there anything you feel is missing from the App/platform you use?

“User friendly features”

“The one I use doesn't track elevation changes”

“Maybe an overview map that tracks your route”

“GPS accuracy”

“Health advice”

“I want to plan my route for free”

“Website chat for live active runners”

“Progress bar”

“There should be a weekly or monthly progress report to better track my overtime progress.”

“Goal pacer to encourage you to improve your goal.”

“I wish I could set goals on my Apple watch”

“A slicker design.”

“When I connect my Galaxy watch with iPhone, I do not get much advantage. It is very disappointing for me. I can't use Galaxy watch's features properly.”

“Maybe ask how participants feel at the end of their activity?”

“Plans & coaching”

“Sometimes it misses my cadence and I really like to know what it is”

“Miles per hour”

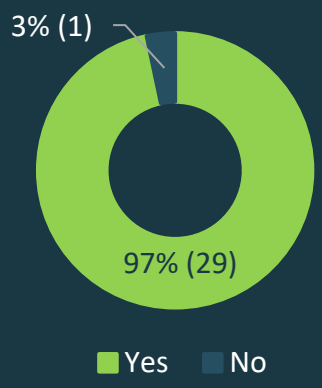
“Personalized offers”

““I think my App needs some motivational phrases for each goals”

Focus: Samsung Galaxy Watch3 and Active2 Users

Perception of Advanced Running Analysis Features Powered by Myotest (30 respondents)

Are you aware of Advanced Running Analysis available in your smartwatch?



If yes, how would you rate it? (1-10)

9.1

average score

Why did you rate it 6-10?

(29 respondents)

"One of **best health products**"

"It's very helpful to track my run"

"It is very good"

"It has one the best user **interface** in the watch industry"

"For the quality and constant **innovative** technology"

"Because **it helped me to keep my body fit**. It helped me in my exercise."

"It is **very helpful attaining specific goals**, running analysis and more"

"The Galaxy Watch does all of the things… It tracks my steps, my exercise sessions, my heart rate. Samsung health app helps me to analyse my exercise and activity history."

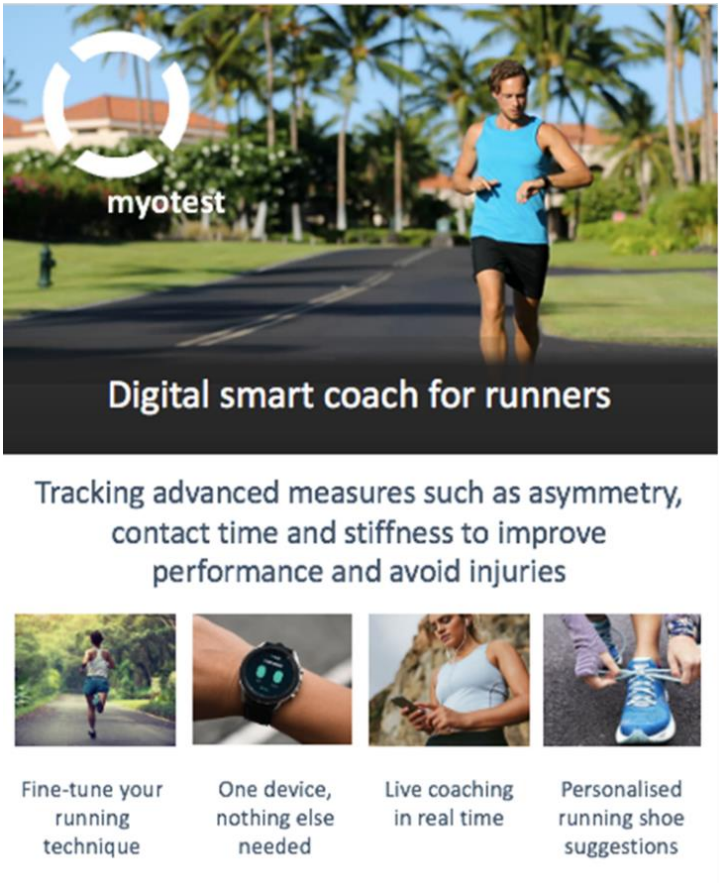
We had the opportunity within this study to get direct feedback for Myotest's technology from Samsung Galaxy Watch3 and Active2 users. Myotest exists in these devices under the form of Advanced Running Analysis. Among our 312 respondents, 30 of them owned either of the two smartwatches. While this sample size is too small to assume its trends apply for all Samsung users, it is a useful window into how Myotest has been received since its release in August 2020. The majority of Samsung Galaxy Watch3 or Active2 users in our sample are aware of the Advanced Running Analysis and rated it highly.

SECTION 4

FEEDBACK ON THE MYOTEST PROPOSITION

Having gathered a better understanding of our runners, we devote our final section to evaluating Myotest's value proposition. Respondents were presented with a short 2-minute video as well as the following adcept (advertising concept). These provide an overview of Myotest's MyoRUN™ technology and some key features from MyoSHOE™, along with the benefits they offer.

Video presenting MyoRUN™



Adcept listing key features offered by Myotest in MyoRUN™ and MyoSHOE™

First Impressions of Myotest Platform

"It seems really smart and helpful. I would definitely get it."

"My first impressions are positive; **I didn't realize the Cadence and different things could be coded** - that's a good idea. Plus, it doesn't seem like it's too invasive and intruding on your thoughts"

"I think it could be annoying if there is an audio lag or if it doesn't say the right thing accurately"

"It has **everything a runner could ask for**"

"Interesting concept, but is it a device or app?"

"Very interesting - it's like a portable coach on your wrist/in your ear. I do wonder, though, if, at times, I would yell at the coach to just shut up…"

"I am highly interested in this app. **It can provide me with tools and advice that other running apps usually cannot**."

"Live coaching in real time sounds amazing! I'm only curious as to **how it would work when running, as most of the time runners involve music** and the coaching may be hard to hear."

At this stage, how would you rate this device as something you would use? (Out of 10)

8.9
Smartwatch users (240)

8.7
Non-smartwatch users **(72)**

Why did you rate it 1–5?

(11 respondents)

"I don't like watches"

"It appears to be **pretty generic**"

"I would 100% use if it were for cycling. My running is a side exercise"

"Ok but not different"

"Never knew that there was a device to help you specifically improve how you run to have a better performance"

"Because it had **a lot of abilities that my app does not**"

"They are very innovative - I like it because it monitors on the spot and has a voice that tells you what's your progress and what to do **like personal trainer**"

"There is a lot of **innovation** in their device."

Why did you rate it 6–10?

(301 respondents)

"I like that it helps you to watch your body mechanics to **avoid injury**"

"Definitely **a step up from existing fitness tracking devices** and systems"

"I would most likely use this as long as it didn't interrupt my music and my personal thoughts too many times"

"It looks very simple, and it looks like it has **everything I've ever wanted in a running app.**"

"It's a very intriguing concept but it's also super technical and **because I'm not that dedicated to running, it may not be worth the price for me**"

"**This app seems awesome**, and I have been thinking about switching my app for a while."

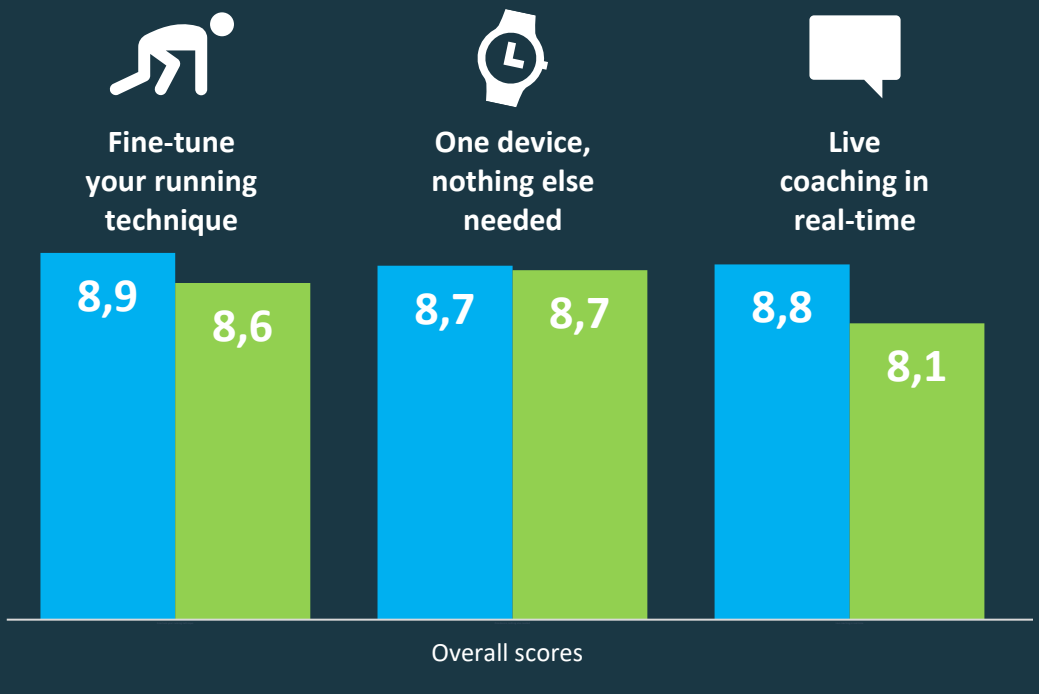
"I think it would **add value to my life at a lower cost than a in-person trainer**."

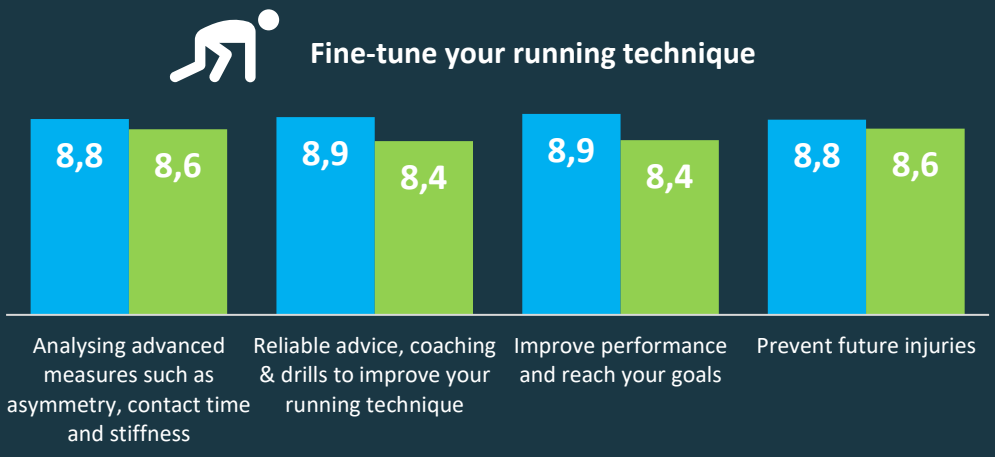
"It could be useful, but **must be accurate**"

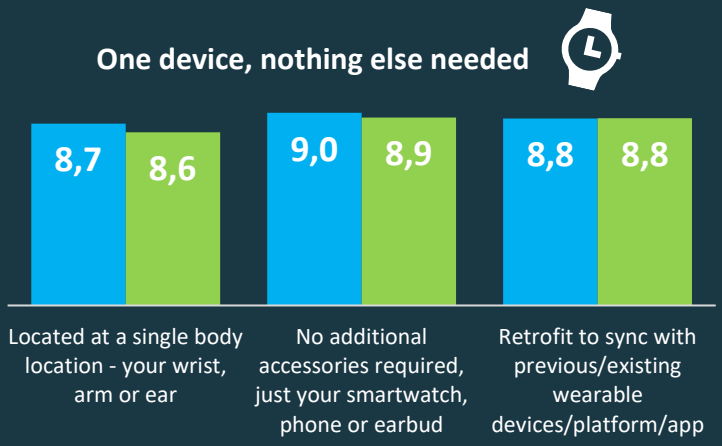
MyoRUN™ Feedback

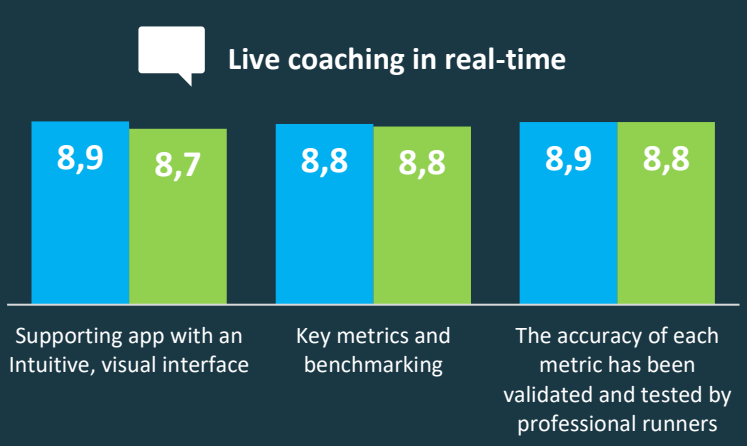
Average ratings of each feature (out of 10)

We asked respondents to rate each MyoRUN™ feature listed on the adcept, establishing an order of preferences and priority. Overall, respondents rated each feature highly and scores were quite close. Fine-Tuning Your Running Technique was the top contender for smartwatch users, while non-smartwatch users preferred the offer of using a single device and no need for additional equipment. The widest difference between our two segments was linked to Live Coaching in Real-Time, with smartwatch users rating it at 8.8, while non-smartwatch users gave it their lowest score at 8.1.





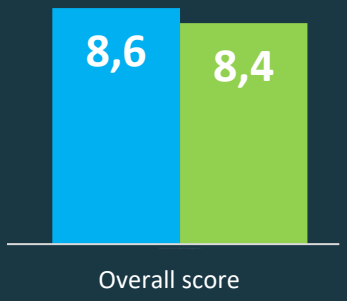




MyoSHOE™ Feedback

Average ratings of each feature (out of 10)

Personalised running shoe suggestions



MyoSHOE™ offers to help runners choose the right running shoes. Through the analysis of a runner's form and drawing from the science of biomechanics, MyoSHOE™ identifies and recommends the shoes that are best suited to a runner, to help them increase performance and avoid injury. This solution currently takes the shape of an application for smartphones, which has been tested with customers in partnership with a sports equipment retailer. It received very positive feedback and contributed to running shoes sales. Myotest was looking to evaluate whether runners would be interested in having this feature integrated to MyoRUN™ and available from the smartwatch. Results confirm that these features hold value for runners.

What is your overall impression now that you've seen more detail?

"I want it and will find out more"

"It is a highly intuitive product"

"**Personalized and nearly perfect**"

"It helps to relate with my running activities... actually these all things are actually **necessary for a good runner**"

"Positive and attracted more towards smart watch, specially for fitness and running."

"It's good, but **needs to be accurate and cheap**"

"That is a **fully comprehensive device and would love to try it**!"

"It has been accurately tested and personalized for each person, and overall sounds like a product I'd be interested in buying."

"**The more details I read about this digital smart coach, the more I want to test one out and see how it works in person**."

"Even more impressed. Hope it's reasonably priced!"

Would you use this running app/platform?

98%

of smartwatch users

97%

of non-smartwatch users

said yes

Would you buy a wearable device because it included this app/platform?

96%

of smartwatch users

92%

of non-smartwatch users

said yes

If no, why not? (6 respondents)

"Not interested enough"

"It's not special"

"I would use the app but not now at this time."

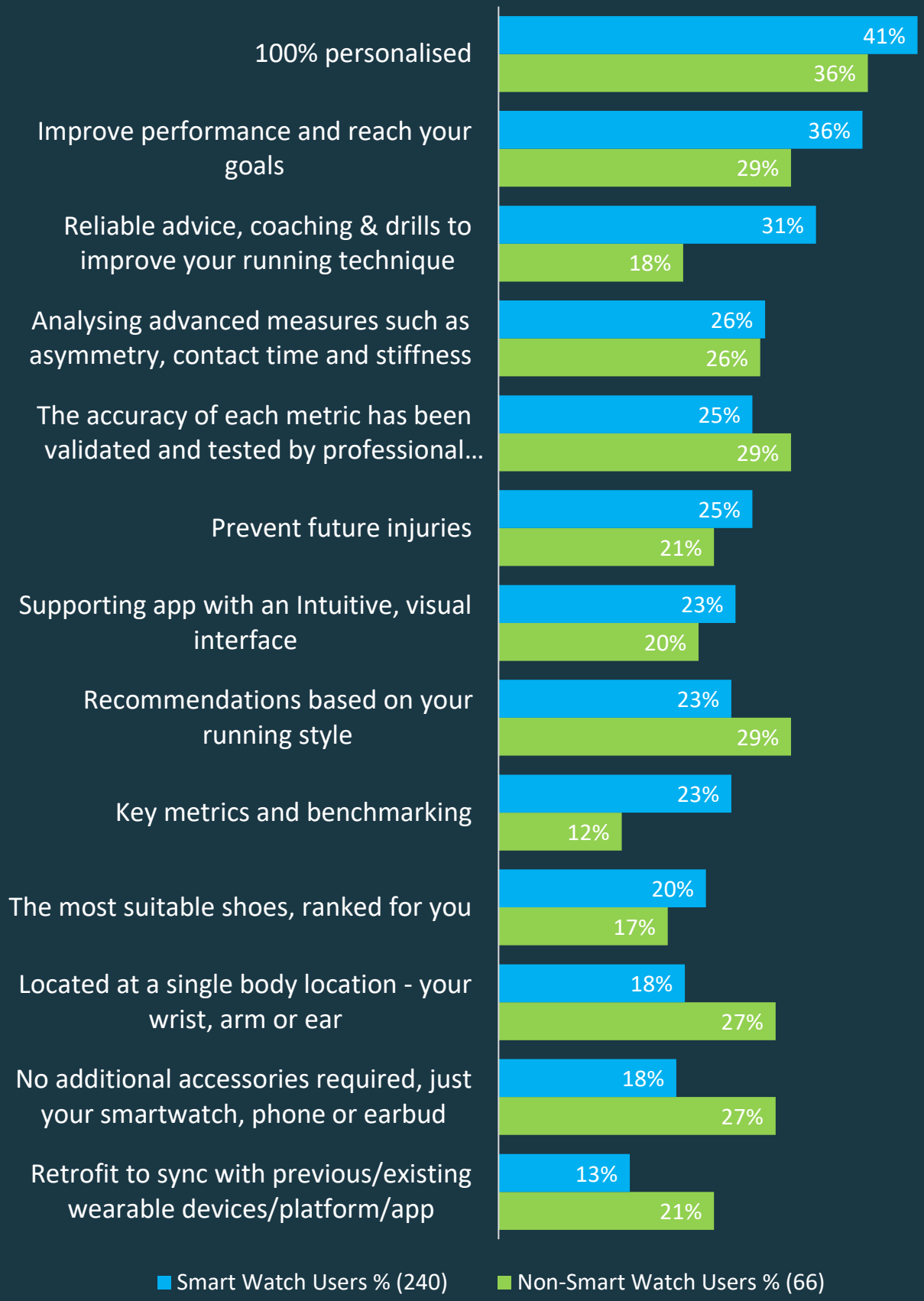
Why wouldn't you choose a wearable because it included this app/platform? (10 respondents)

"**I already have one I'm happy with**"

"I already have a Garmin and Apple device; I don't need a third"

"**I'd prefer that app or platform be made available for the devices I already own**."

If yes, what are the main reasons you would choose this app/platform?



Is there anything that you think could make this running app/platform more appealing?

"Affordable"

"Add music system"

"Able to plan your route"

"Add some whimsy, to keep things fresh. Could the coach throw in some jokes from time to time?"

"Real time alerts"

"Only make it affordable"

"I don't like to wear earphones while running. Have it make noise without earphones on the street."

"Add voice features like voice over from other actors"

"Giving you some recommendations on music to listen while on the run would maybe be good"

"Can add Google Maps"

"Weight loss options"

"I think this App is more attractive if it is available for iOS and Android devices."

"Low cost"

"Able to map my run"

CONCLUSIONS & NEXT STEPS

RUNNING FORWARD

The findings of the survey validate the proposition of MyoRUN™ and aid the Myotest team in understanding the needs of their existing and potential future customers.

This study was crafted to deepen Myotest's understanding of its end users, namely runners who use wearable devices. It also sought to evaluate the perception runners have of Myotest's value proposition, with an added focus on Samsung Galaxy Watch3 and Active2 users, who have had the opportunity to test out the technology for themselves through these devices.

Myotest's proposition was initially rated highly by all groups, with an 8.9 rating across smartwatch users, indicating a good first impression based on the advertising concept and video presented to respondents. Delving deeper into the details, each feature was rated 8.4 or above on average by runners.

The overall response was extremely encouraging, with 98% of smartwatch users saying they would use MyoRUN™ and 96% of them stating they would buy a wearable device specifically because it included Myotest's running app/platform. Non-smartwatch users also showed a high degree of interest, with 97% saying they would use it and 92% would consider purchasing a device because it included MyoRUN™. These numbers clearly validate Myotest's proposition and show that it meets runners' needs, wants and expectations. This was further solidified by the responses of Samsung Galaxy Watch3 and Active2 users, 97% of whom were previously aware of the Advanced Running Metrics. These users gave positive feedback, rating Advanced Running Analysis highly with an average of 9.1.

When rating detailed features, respondents showed a marked interest in the platform being 100% personalised (41%), in improving performance and reaching their goals (36%), and in getting reliable advice, coaching & drills to improve your running technique (31%).

The message is clear: Runners want technology that fits their personal needs, and they want data to help them improve their health and performance in an easy-to-use, accessible solution. From our experience of testing Tech propositions, this was the most conclusive response we have witnessed to date and certainly places the team at Myotest in a prime position to succeed with this target market. We can also identify opportunities for Myotest to expand its solution beyond running, as many runners practice other sports, with walking as the most common activity (46%). This shows the way to new possibilities for the technology and holds valuable potential for its future.

DISCLAIMER

This consumer study was conducted by independent UK-based innovation and insight company TRKR Ltd in March 2021, commissioned by Myotest SA, provider of the Advanced Running Analysis software available on the Samsung Galaxy Watch3 and Active2 devices.

Conducted in the form of a 30-question online survey, the study intended to gather insight from runners who use wearable technology, and also to obtain their feedback on the Myotest software.

The data and graphics shown in this report result from the answers of 312 Californian respondents, surveyed on 2nd March 2021.

GET IN TOUCH

TRKR

www.trkr.co.uk

@TRKR_UK

/company/trkr-insight

175 Glasgow Road,
Edinburgh, Scotland, GB

MYOTEST

www.myotest.com

info@myotest.com

/company/myotest

Rue de la Blancherie 61,
1950 Sion, Switzerland

TRKR Ltd.

March 2021

www.trkr.co.uk