

Market Demand

Company Growth (Peloton)

User Engagement (Fitbit)

# AI Fitness Market – Demand Signals (Google Trends)

2/4/2024 12/26/2025

AVG FITNESS APP TREND

40.36

AVG AI COACH TREND

0

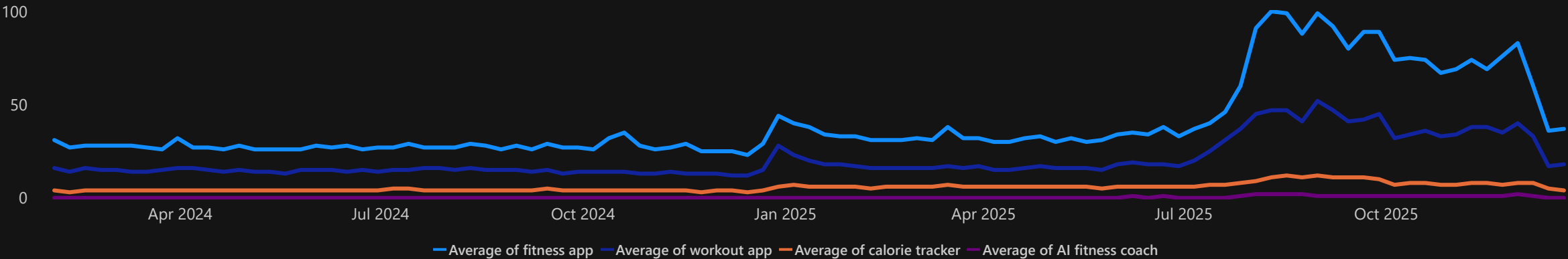
AI DEMAND INDEX (%)

0.7%

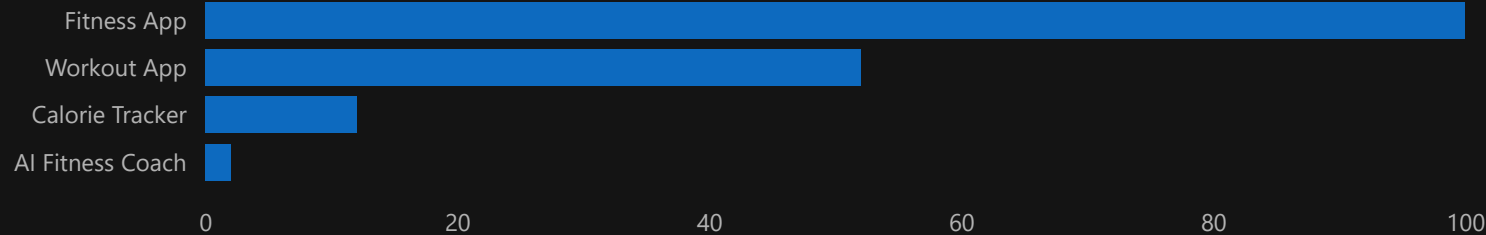
AI VS FITNESS INTREST GAP

40.1

## SEARCH INTEREST TRENDS OVER TIME



## PEAK INTREST BY TOPIC



## KEY INSIGHTS

- AI fitness coach interest accelerates toward Q4.
- Calorie tracker demand remains steady with seasonal spikes.
- Overall market momentum indicates a strong upward trajectory.

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# Company Growth – Peloton KPIs (Quarterly)

Quarter

All

TOTAL REVENUE (\$M)

1904.8

PELOTON CONNECTED SUBS

8.559

PELOTON APP SUBS

1.704

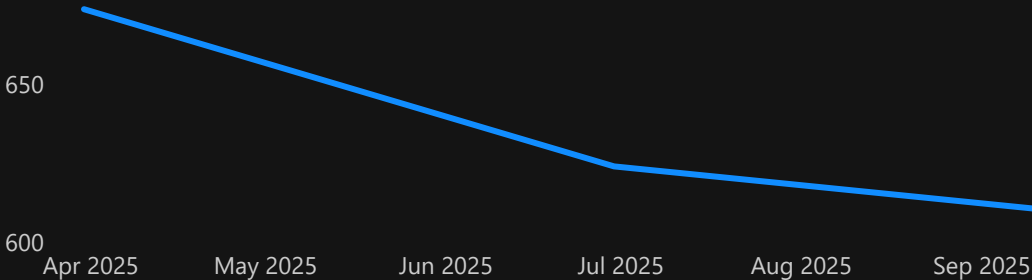
PELOTON CONNECTED CHURN

1%

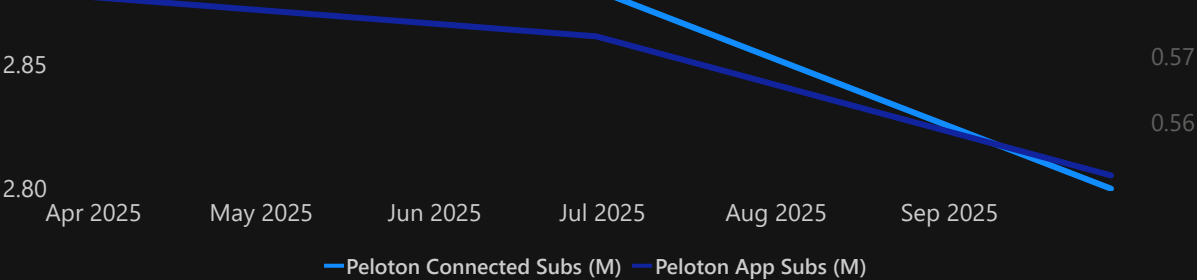
PELOTON FREE CASH FLOW (\$M)

313.1

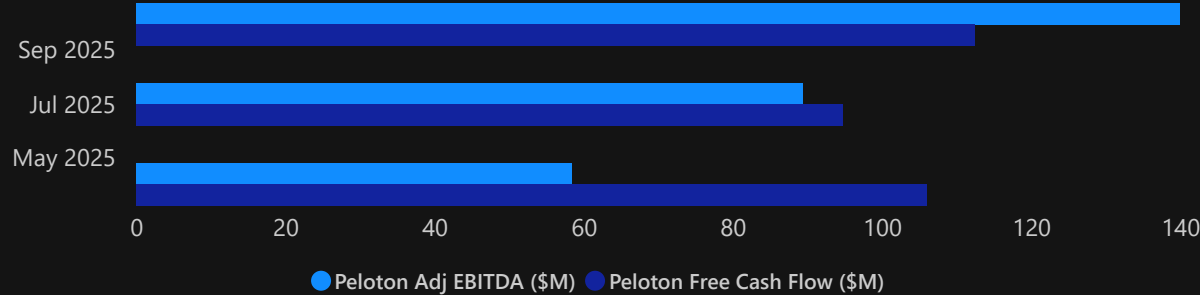
PELOTON REVENUE (\$M)



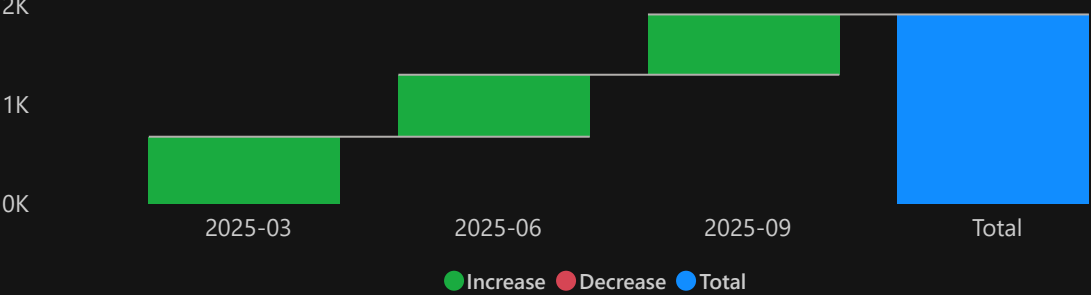
SUBSCRIBERS TREND



PROFITABILITY & CASH GENERATION (\$M)



REVENUE CHANGE



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# User Engagement (Fitbit)

6/1/2015

12/26/2025

FITBIT USERS

35

FITBIT ACTIVE DAYS

457

FITBIT AVERAGE STEPS

6.55K

FITBIT AVERAGE CALORIES

2.19K

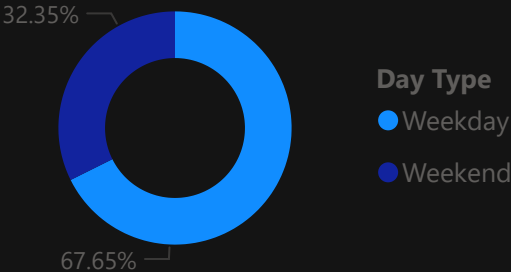
FITBIT ENGAGED DAYS %

56.9%

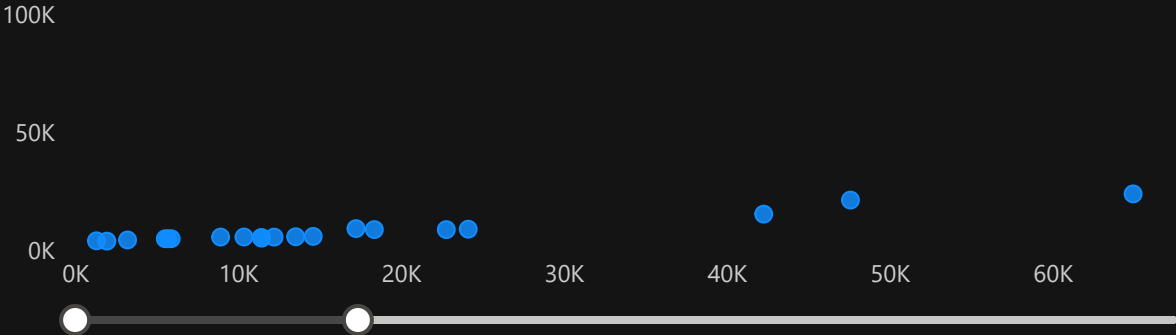
ACTIVITY SUMMARY BY DAY

Day Name	2016-03	2016-04	Total
Fri	19694	472148	491842
Mon	40144	443920	484064
Sat	34039	497694	531733
Sun	37740	398437	436177
Thu	75856	252804	328660
Tue	65735	293054	358789
Wed	96884	263630	360514

WEEKDAY VS WEEKEND ACTIVITY



STEPS VS CALORIES (DAILY)



ENGAGED VS LOW ACTIVITY DAYS BY MONTH

