



ESA DIGITAL

22 October 2026

Fitness App **Organic ROI Forecast 2027**

Fitness, sports & wellness subscription apps · US search demand · global AI visibility

Industry report · Prepared by **ESA Digital** · Ahrefs Site Explorer, Keywords Explorer + Brand Radar

[Check interactive report](#)

1. Key findings

FINDINGS

- A Search demand is about the problem, not the app.** 4.3M US searches/mo across eight fitness topics, and only 2.8% of it asks for an app by name or type ("best workout app", "fitness tracker app"). The rest is calculators, plans and how-to queries that an app can answer with a page.
- B Calorie maths is the biggest door into the category.** Calorie & Macro Tracking alone is 40% of the volume: "calorie calculator" (964K/mo) and "calorie deficit calculator" (245K/mo) dwarf every workout query in the set.
- C Brand size does not equal organic footprint.** Strava has the most traffic (1.18M/mo) and the strongest link profile (DR 91), yet ranks for only 16K keywords, most of them branded. Peloton ranks for 58K keywords with 29K in the top 3, the widest non-branded footprint in the set.
- D AI answers mention the big names but cite the specialists.** Peloton and Strava take 78% of the set's 9.8M AI impressions/mo, almost all on questions about themselves. Fitbod has 3% of impressions, yet 6 of its 9 top cited ChatGPT prompts are unbranded category questions like "Which workout app is best?".
- E Funnel quality decides whether organic pays.** On the benchmark funnel, a Growth program returns \$88K on \$263K over 24 months for a median app, and \$887K (break-even in month 11) for a top-quartile one. Same traffic, ten times the revenue.

WHAT TO DO

Build the pages people search before they pick an app: calculators, training plans and comparison pages, each one ending in the app. Put proof (data, expert review, pricing) on those pages so AI answers cite them, and fix the install → paid step first, because it decides whether the traffic pays.

2. SEO Opportunities

RELEVANT CONTENT IDEAS

6 733

TOPICAL CLUSTERS

8

MONTHLY SEARCH VOLUME

4 291 690

CLUSTER	VOLUME SHARE	IDEAS	VOL/MO
Calorie & Macro Tracking ↗	39.6%	992	1 809 240
Meal Plans & Weight Loss ↗	16.4%	936	750 260
Home Workouts ↗	11.8%	855	540 860
Strength & Gym Programs ↗	10.4%	902	473 570
Running & Couch to 5K ↗	5.8%	933	263 820
Yoga & Pilates ↗	5.3%	838	240 080
Fitness App Comparisons ↗	2.8%	634	129 120
Cycling & Indoor Training ↗	1.9%	643	84 740
Relevant total	93.9%	6 733	4 291 690
Off-topic / adjacent — excluded	6.1%	547	280 360
Total		7 280	4 572 050

How this was built >

FINDINGS 🚩

Calorie & Macro Tracking (39.6%) and Meal Plans & Weight Loss (16.4%) together hold more than half of the relevant US demand, and both are dominated by tool and plan queries ("calorie calculator", "keto diet plan", "mediterranean diet meal plan"). Workout topics (Home, Strength, Running, Yoga) add another 33%, mostly as "plan for beginners" searches. Searches that name an app category are the smallest slice at 2.8%.

WHAT TO DO 🛠️

Start with tools and plans: a calorie and macro calculator and a library of downloadable plans (couch to 5K, half marathon, beginner strength, wall pilates). Each page should solve the query in the browser and offer the app as the way to keep going. Comparison pages ("best workout tracker app") come second: low volume, but the highest intent.

3. Competitive Landscape

3.1 Organic SEO — Ahrefs Site Explorer

BRAND	ORG. TRAFFIC/MO ↓	ORG. KEYWORDS	TOP 3	BACKLINKS	ORG. VALUE	DR
Strava ↗ strava.com	1 183 548	16 121	6 668	62 204 787	\$239K	91
Peloton ↗ onepeloton.com	813 650	58 055	29 396	341 045	\$372K	82
MyFitnessPal ↗ myfitnesspal.com	437 654	28 011	5 738	707 941	\$197K	84
Noom ↗ noom.com	236 282	18 368	7 231	195 285	\$388K	75
Fitbod ↗ fitbod.me	147 684	21 577	8 893	50 685	\$29K	69

Click column header → sort. Click brand row → SEO dashboard. Bars are normalized per column.

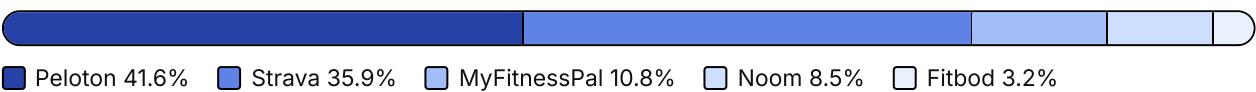
3.2 AI Visibility — Brand Radar (impressions/month)

BRAND	CHATGPT	AI OVERVIEWS	AI MODE	TOTAL ↓
Peloton ↗ onepeloton.com	1 382 055	1 742 006	934 045	4 058 106
Strava ↗ strava.com	877 936	1 821 110	804 921	3 503 967
MyFitnessPal ↗ myfitnesspal.com	284 630	456 864	317 739	1 059 233
Noom ↗ noom.com	323 726	327 256	178 726	829 708
Fitbod ↗ fitbod.me	139 045	117 267	56 357	312 669

Click column header → sort. Click row → ChatGPT citation prompts. Brand Radar matches **brand names**, not domains.

3.3 AI Share of Voice

Peloton 41.6% — the 5 brands in this set hold **9 763 683** AI impressions/mo across ChatGPT, AI Overviews & AI Mode.



FINDINGS

The five brands hold 9.8M AI impressions/mo across ChatGPT, AI Overviews and AI Mode. Peloton (41.6%) and Strava (35.9%) lead, but their cited prompts are almost all about themselves: price, "is it worth it", "why did everyone leave Peloton". Category questions ("Which workout app is best?", "best free calorie counter") are where Fitbod and MyFitnessPal get cited, next to review sites and smaller apps. Note: "Peloton" is also a cycling term, so part of its impressions may be name noise.

WHAT TO DO

To be named in AI answers for category questions, publish pages that answer them directly: honest comparisons with competitors, pricing and free-tier explainers, and how-to guides with your own data. The citations show that AI engines pull from the brand's own help and pricing pages, so keep them current and specific.

4. ROI Forecast

INDUSTRY BENCHMARK

Weak

Typical

Strong

×

PACKAGE

Start

Growth

Scale

×

PERIOD

12m

24m

36m

Forecast outcomes

BREAK-EVEN

> 24mo

24M REVENUE

\$88K

24M ROI

-66%

24M PROFIT

-\$175K

Investment

PROGRAM COST

\$263K

PUBLISHED PAGES

600

Parameters

PACKAGE INPUTS

Pages / month 25

Monthly cost \$11K

CONVERSION FUNNEL · TYPICAL TIER

Visit → Install 3%

Install → Paid 2.9%

Revenue / payer / yr \$36

CONTENT PERFORMANCE

Months to peak 7

Avg visits/page 180

Success rate 60%

AI / GEO LIFT

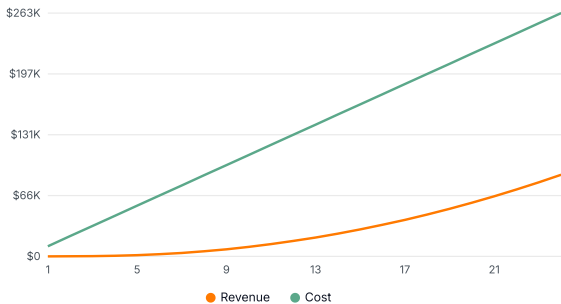
LLM ratio 0.1x

LLM conv boost 2x

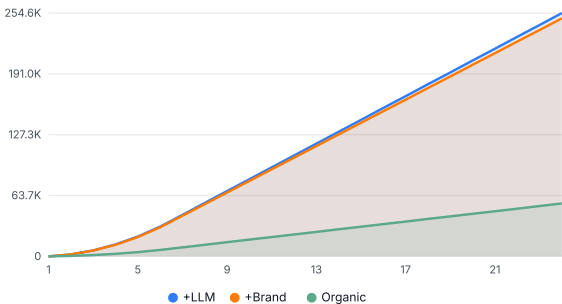
[Dive deeper — change parameters in the ROI calculator ↗](#)

– Open the interactive model to adjust assumptions yourself.

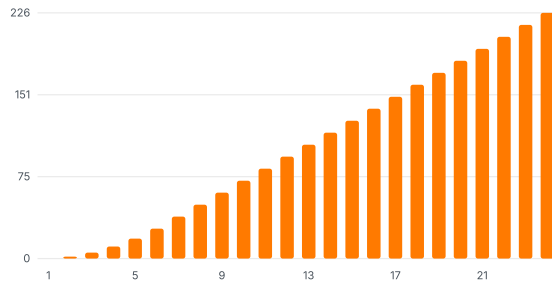
Cumulative Revenue vs Cost



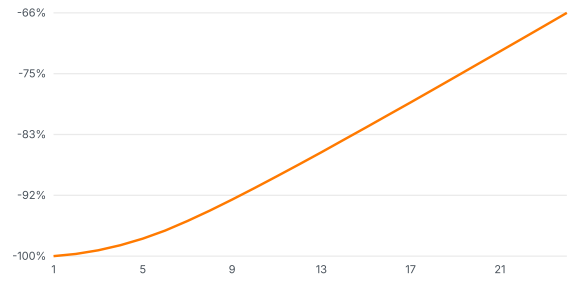
Traffic Growth



New Paid Customers



Cumulative ROI



MONTHS	PAGES	ORGANIC	BRAND	LLM	INSTALLS	PAYERS	REVENUE	ROI
1	25	0	0	0	0	0.0	\$0	-100%
2	50	450	1.6K	45	63	1.8	\$66	-100%
3	75	1.4K	4.7K	135	190	5.5	\$199	-99%
4	100	2.7K	9.4K	270	381	11	\$397	-98%
5	125	4.5K	15.8K	450	635	18	\$662	-98%
6	150	6.8K	23.6K	675	952	28	\$994	-96%
7	175	9.4K	33.1K	945	1.3K	39	\$1K	-95%
8	200	12.2K	42.5K	1.2K	1.7K	50	\$2K	-94%
9	225	14.8K	52.0K	1.5K	2.1K	61	\$2K	-92%
10	250	17.6K	61.4K	1.8K	2.5K	72	\$3K	-91%
11	275	20.3K	70.9K	2.0K	2.9K	83	\$3K	-89%
12	300	22.9K	80.3K	2.3K	3.2K	94	\$3K	-87%
13	325	25.6K	89.8K	2.6K	3.6K	105	\$4K	-86%
14	350	28.4K	99.2K	2.8K	4.0K	116	\$4K	-84%
15	375	31.1K	108.7K	3.1K	4.4K	127	\$5K	-82%
16	400	33.8K	118.1K	3.4K	4.8K	138	\$5K	-81%
17	425	36.5K	127.6K	3.6K	5.1K	149	\$5K	-79%
18	450	39.1K	137.0K	3.9K	5.5K	160	\$6K	-77%
19	475	41.9K	146.5K	4.2K	5.9K	171	\$6K	-75%
20	500	44.5K	155.9K	4.5K	6.3K	182	\$7K	-74%
21	525	47.3K	165.4K	4.7K	6.7K	193	\$7K	-72%
22	550	50.0K	174.8K	5.0K	7.0K	204	\$7K	-70%
23	575	52.6K	184.3K	5.3K	7.4K	215	\$8K	-68%
24	600	55.4K	193.7K	5.5K	7.8K	226	\$8K	-66%

ESA ROI Calculator · Start 10/\$5.5K · Growth 25/\$10.95K · Scale 40/\$15.5K · peak 7 mo, success 60%, 180 visits/page, brand ×3.5, LLM 0.1×, LLM conv ×2. Funnel inputs follow the industry benchmark switch (Weak / Typical / Strong = bottom quartile / median / top quartile of the category). Revenue per payer is 12-month revenue, not lifetime value; visit → install is an estimate (no open benchmark for search visitors).

FINDINGS

On the Growth package over 24 months, the Typical tier returns **\$88K** on a **\$263K** program (ROI -66%): the median fitness app turns too few installs into payers, and a payer is worth \$36 a year. At the Strong tier (8.2% visit → install, 6.2% install → paid, \$62 per payer) the same pages return **\$887K** and break even in month 11. Funnel quality, not traffic, decides the outcome.

WHAT TO DO

Before buying traffic, measure your own visit → install and install → paid rates. If they sit near the median, fix onboarding and the paywall first; organic growth multiplies whatever the funnel already does.

Sources & Benchmarks

I. Sources

- **Content** — [Ahrefs Keywords Explorer](#) (US volumes) + [ESA](#) intent clustering
- **Organic SEO** — [Ahrefs Site Explorer](#)
- **AI Visibility** — [Ahrefs Brand Radar](#) (ChatGPT / AI Overviews / AI Mode; citations API limit 25)
- **ROI** — [ESA ROI Calculator](#) + service packages
- **Industry benchmarks** — [RevenueCat](#), [State of Subscription Apps 2026](#), [Adapty](#), [State of In-App Subscriptions 2026](#), [Unbounce](#), [Conversion Benchmark Report 2024](#)

II. Benchmarks

Reference ranges for a subscription-app funnel — Visit → Install → Trial → Paid — for the median app in the category and its bottom and top quartiles. Rows marked **ROI-model input** feed the forecast above. All figures are modelled estimates on the stated inputs, not guarantees.

II.A. Conversion — industry benchmarks

FUNNEL STEP	WEAK → TYPICAL → STRONG	SOURCE / NOTE
Visit → Install	 Weak 1% Typical 3% Strong 8.2%	Estimate; strong = landing-page benchmark (Unbounce 2024)
Install → Trial (30 days)	 Weak 2.6% Typical 6.9% Strong 13.6%	RevenueCat 2026
Trial → Paid	 Weak 26.1% Typical 37.7% Strong 51.4%	RevenueCat 2026, Adapty 2026
Install → Paid (35 days)	 Weak 1.1% Typical 2.9% Strong 6.2%	ROI-model input. RevenueCat 2026
Revenue per payer (12 months)	 Weak \$18 Typical \$36 Strong \$62	ROI-model input. RevenueCat 2026
Avg. visits per page (peak)	180 visits	ROI-model input. Ahrefs top pages of the five leaders (US, pages with 10–3,000 visits/mo, top 100 per domain, n=500) have a median of ~380 and a trimmed mean of ~480 visits/page, but those pages carry years of links and brand pull. A newly published page is modelled at 180 .
Revenue per payer (12 months)	\$36	ROI-model input. RevenueCat, State of Subscription Apps 2026: 12-month revenue per payer for Health & Fitness apps (bottom quartile / median / top quartile).

II.B. GEO benchmark ranges

GEO METRIC	EARLY	HEALTHY	AI-HEAVY	NOTES
LLM traffic ratio	0.01–0.04×	0.05–0.12×	0.15–0.30×	LLM referrals as a multiple of organic

GEO METRIC	EARLY	HEALTHY	AI-HEAVY	NOTES
LLM conversion boost	+50–120%	+300–500%	+400–700%	ChatGPT highest; AI Overviews lowest
Content success rate	30–50%	45–65%	50–70%	Service pages and how-to content rank best
Months to peak	3–6	6–14	14–24	Per published cohort
Brand traffic multiplier	0.05–0.15×	0.20–0.40×	0.45–0.90×	Fixed at 3.5× brand-lift in the model