

Insights on Consumer Engagement for Health and Wellness

A Parks Associates Snapshot



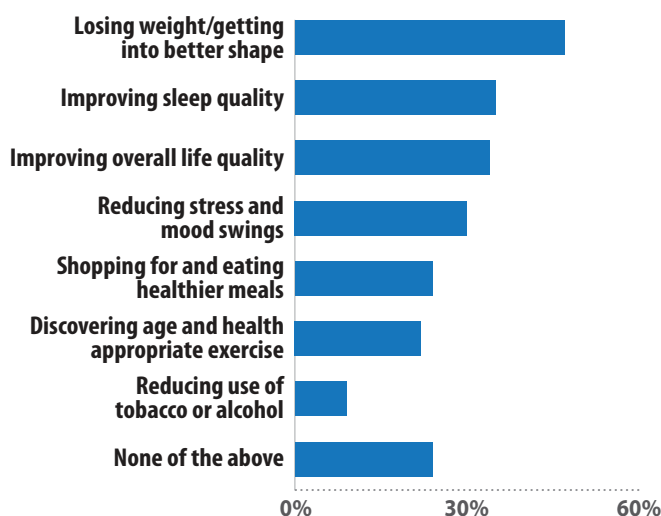
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Communication and Health Improvements

- 75%+ of consumers in U.S. broadband households admit to at least one health improvement need, primarily in losing weight or improving sleep quality.
- 60%+ of consumers in U.S. broadband households are interested in receiving information about a health condition, including 38% on better daily routines and 27% on doctor-recommended programs.

Perceived Health Improvement Needs

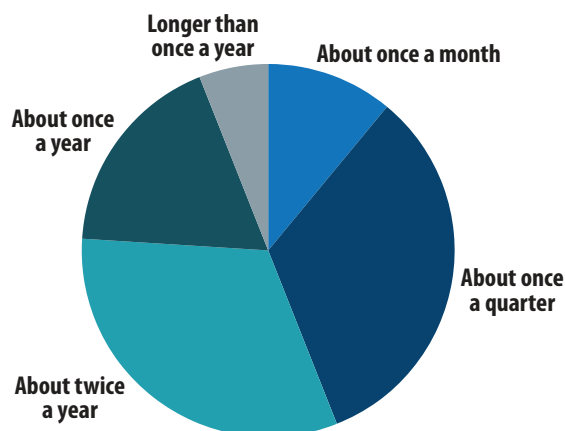
U.S. Broadband Households



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Frequency of Communicating with a Doctor about Health Condition

U.S. Broadband Households with a Chronic Condition Under Care of a Primary Care Doctor



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Consumers do not have strong lines of communication with their doctors.

- 60%+ of consumers in U.S. broadband households have at least one chronic condition, but 11% of these consumers do not have a primary care physician.
- Of those who have a chronic condition and a primary care physician, 33% talk to their doctors only twice a year, while 25% communicate only once a year or less.
- 30% of consumers ages 18-24 who have chronic conditions do not have a primary care doctor.

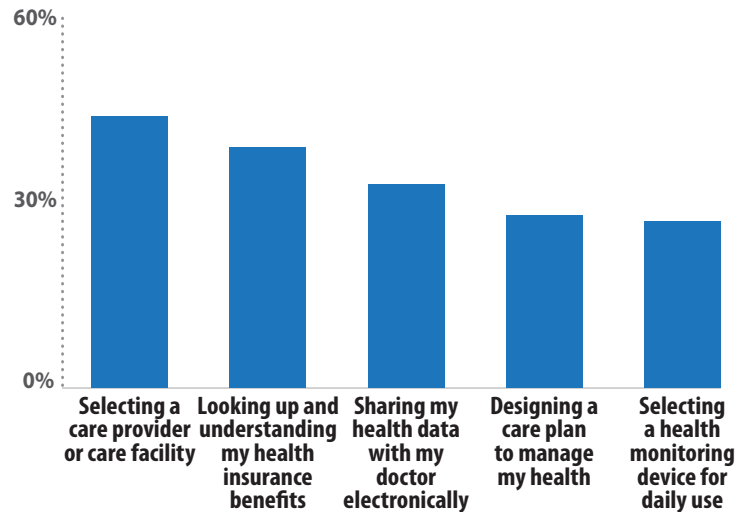
Health Related Activities

Consumer comfort with specific health-related activities remains low – strategies to improve consumer comfort in designing care plans and selecting monitoring devices are needed.

- 12% of U.S. broadband households own a digital pedometer or fitness tracker with Wi-Fi or Bluetooth connectivity.
- One-third of U.S. smartphone owners use an app to track diet and nutritional information.
- 8% of U.S. broadband households own a smart watch with digital health capabilities.

Consumers Very Comfortable in Completing Health Activities

U.S. Broadband Households



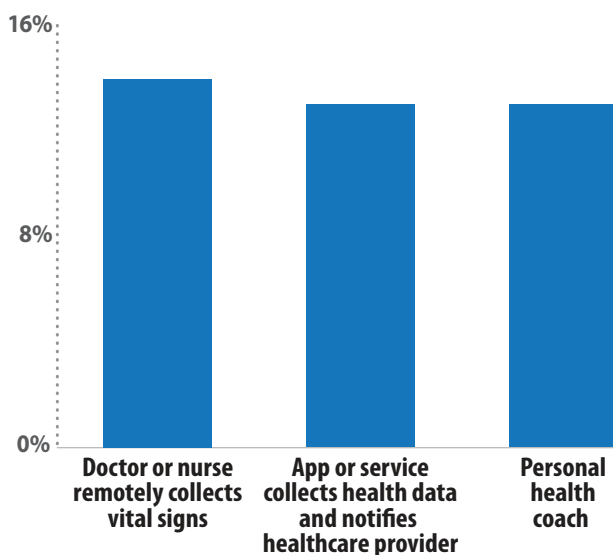
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Health Services

Consumer interest in new connected health services is also low; only 13-14% of U.S. broadband households are interested in each service. Among consumers with a chronic condition, options such as free trials and no contracts will help boost interest in services such as a health coach.

Consumers Very Interested in Health Services

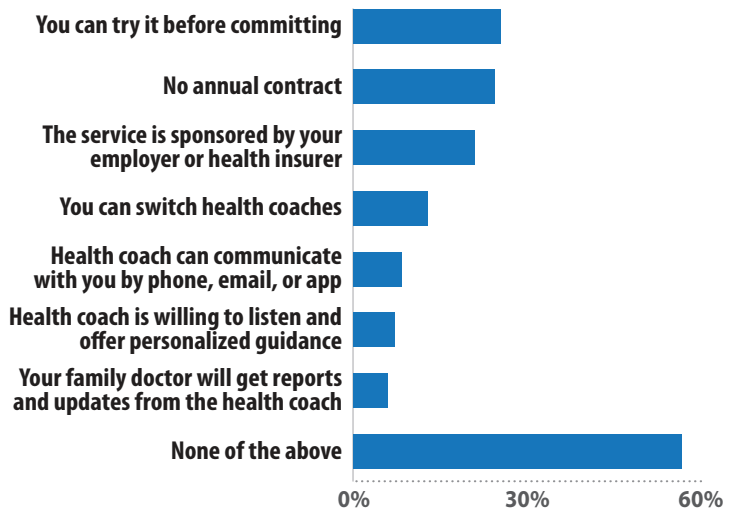
U.S. Broadband Households



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Factors that Increase Consumer Interest in a Health Coaching Service

U.S. Broadband Households with a Chronic Condition Who Are Initially Not Interested in a Health Coaching Service



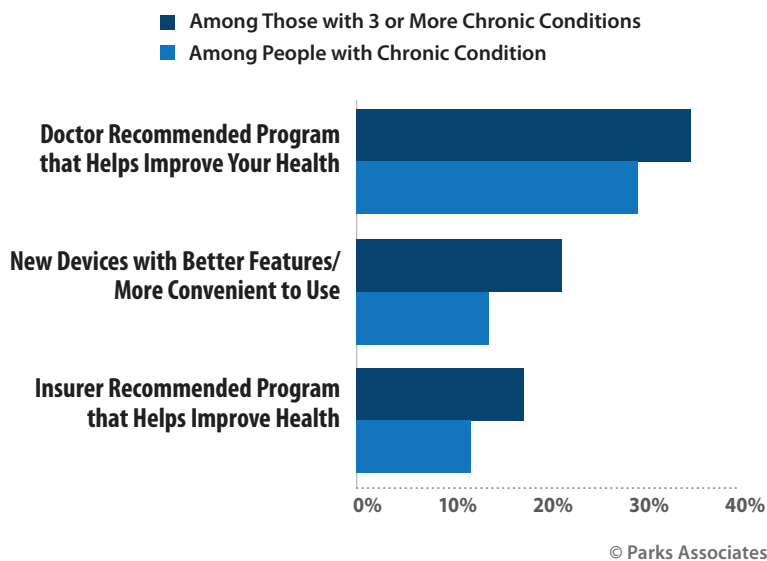
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Health Offerings

Companies can promote these types of offerings – free trials, app-enabled communication – through the growing number of connected healthcare devices, which have gained traction:

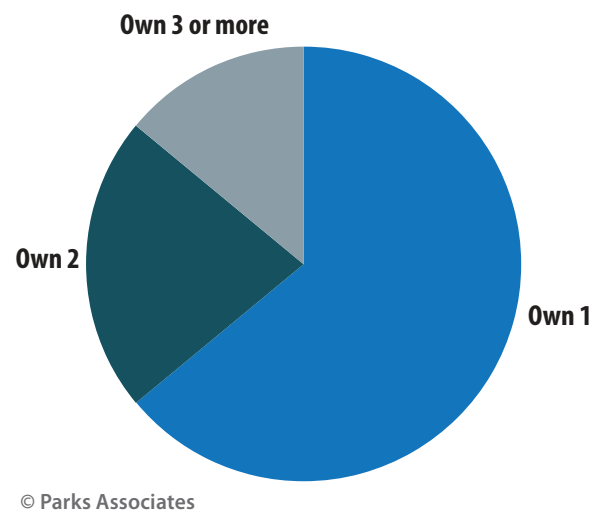
- 36% of U.S. broadband households own at least one connected healthcare device. Over one-third of these owners have more than one device.
- Over 75% of U.S. broadband households are interested in management tools and support for current health-related needs.
- Nearly 50% of U.S. broadband consumers would like tools and support to help them lose weight, and 33%+ are interested in products and services that can improve overall life quality.

Consumer Interest in Chronic Care Support



Number of Connected Health Devices Owned

U.S. Broadband Households that own at least one Connected Health Device



This research segments consumers and analyzes adoption and usage to identify key strategies to engage consumers in four areas for the success of connected healthcare:

- Remote health monitoring for accountable care
- Consumer-centric wellness and fitness solutions
- Independent living technologies and services
- Innovative virtual/convenience care models



CONNECTED HEALTH TRACKER SERVICE

Understanding Consumer Adoption of Connected Health Devices and Services

Core Research Areas

Consumerism of Healthcare

Digital Disruptions in Healthcare Service Delivery

This research addresses:

- Consumer adoption and usage of healthcare devices and services, including five years of consumer survey data
- Case studies of care providers leveraging technologies to change consumer behaviors
- Market entry, business models, and engagement opportunities for care providers, device makers, fitness companies, and health programs

Parks Associates consumer segmentation and analysis identify 14 consumer segments within four major health consumer categories.

This segmentation allows care providers the flexibility to target health consumers at scale without losing the ability to micro-target individual segments.



Led by **Harry Wang, Senior Research Director, Parks Associates**, a recognized expert in digital health research since 2005.

For More Information:

972-490-1113

sales@parksassociates.com

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