

# Market Snapshot

## COVID-19 Contact Tracing: Consumer Perspectives

Q3 2020

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# Survey Methodology

**Data presented in this study are drawn primarily from an online survey conducted in May 2020, while the effects of the COVID-19 crisis were strongly felt in the United States.**

This survey was fielded between May 14<sup>th</sup> and May 27<sup>th</sup> to heads-of-broadband households in the United States.

- The survey captured 5,008 heads-of-broadband households.
- This sample was split to show special topic questions to smaller groups. Some questions related to connected health solutions were asked of a ~2,500 sub-segment of the full sample. Sample sizes are noted on each chart.
- The survey is demographically representative of broadband households for the full 5,008 survey results as well as for each 2,500-sample sub-group.
- Demographic quotas are set for age, gender, household income, and education.
- Trending data is presented from multiple online surveys fielded between 2017 and 2020.

## The Respondent Mindset: COVID-19 News in May 2020

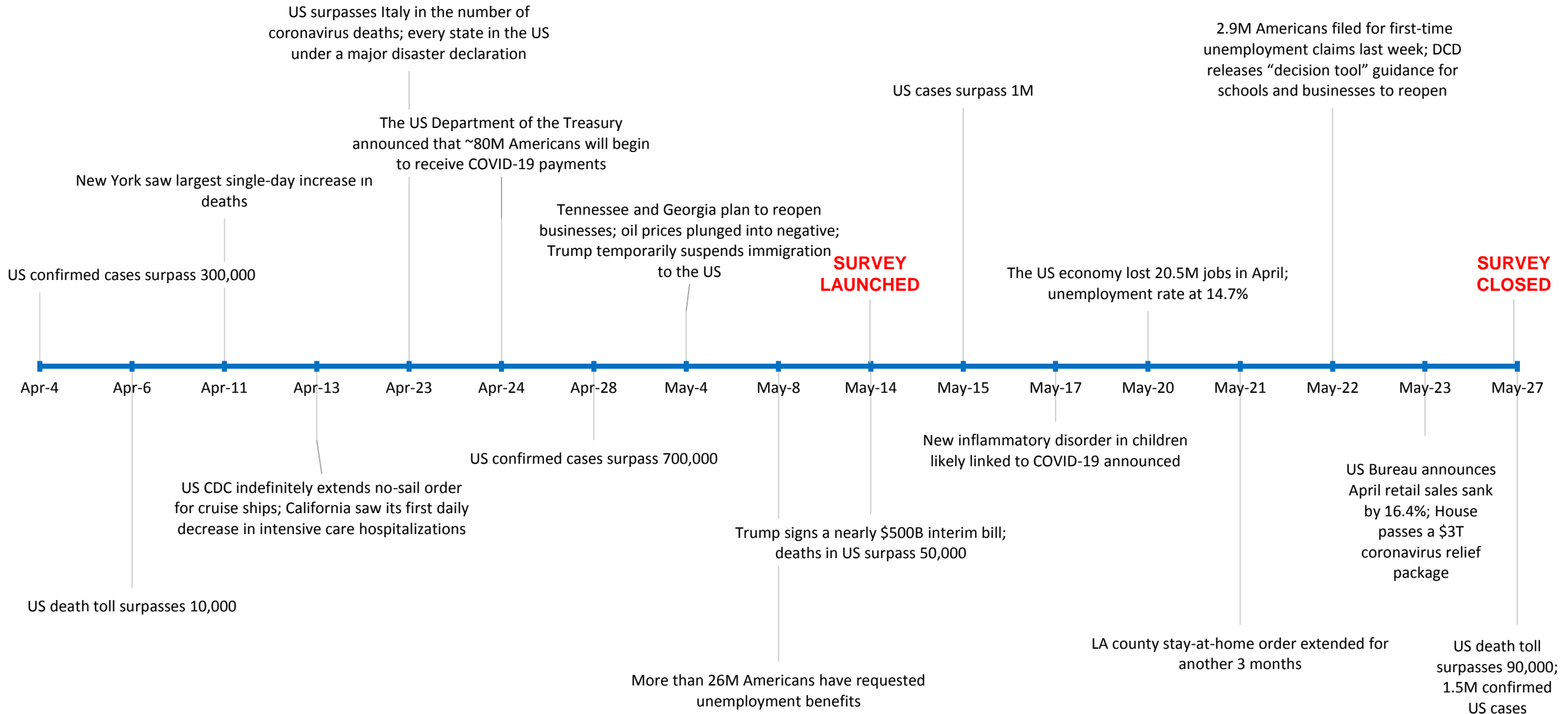
Lead-up to survey launch, May 1<sup>st</sup> – 13<sup>th</sup>:

- U.S. jobs report notes 20.5M jobs lost in April
- Unemployment rate at 14.7%
- 2.9M Americans file for first-time unemployment
- News of new inflammatory disorder in children linked to COVID-1

During survey fielding: May 14<sup>th</sup> – 27<sup>th</sup>

- 1.5 million confirmed COVID-19 cases in the U.S.
- U.S. surpasses 100,000 COVID-19 deaths
- New York sees decline in COVID-19 deaths
- Nearly 40M Americans unemployed
- All states start lifting some lockdown measures

# Parks Associates May Survey and COVID-19 Timeline.



## Executive Summary

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# Industry Insight

The COVID-19 pandemic has turned the healthcare ecosystem on its head. The outbreak led to sharp decreases of in-person visits and the delay of elective care procedures, due both to official public safety measures and consumers' avoidance of exposure risk. Care providers and health systems have leaned on technology to provide much needed care to patients at home, through telehealth consultations and remote patient monitoring programs. Similarly, public health officials look to technology to help slow the spread of the virus itself, through smartphone-based contact tracing.

Contact tracing is proven to help contain infectious disease; it is traditionally performed by trained personnel who identify and contact those who may have been exposed by an infected person. However, much of its effectiveness depends on the recall quality of the infected person and the timeliness of tracers' ability to locate and contact potentially exposed persons. Using Bluetooth signals to detect the distance and duration of interaction between people, a smartphone-based approach promises to detect many people with whom an infected person may have come into contact, but who are unknown to the person. It can also make notifications of potential exposure nearly instantaneous.

Tech giants Apple and Google collaborated to create the underlying technology, releasing an API for smartphone-based contact tracing in May. However, it was left to public policy makers, health organizations, and other third-party players to build the apps, attract users, and make effective use of the technology. Several European countries, including Switzerland, Germany, and Ireland, released contact tracing apps quickly. The U.S. has been slow to make use of the technology, with states and individual counties hiring teams of thousands of people to conduct manual tracing instead.

For *effective* digital contact tracing, consumers must adopt the technology. A study by Oxford University indicates adoption by just 15% of the population will result in reduced disease transmission and fewer deaths, though adoption by 60% or more of the population yields the greatest public health benefits. To promote wider adoption, Apple and Google rolled out *Exposure Notification Express* on September 1<sup>st</sup>, removing the requirement that individuals seek out and download an app from a public health official. Instead, Apple and Google are taking on app development and ongoing support themselves to relieve health organizations of that burden.

25 states have expressed interest and 10 have signed on as of mid-September 2020.

Of course, consumers themselves must opt-in to the system, requiring a high level of trust that their data will be protected, their identity will be kept private, and that their participation is meaningful and effective. **If such assurances are put in place, Parks Associates research indicates many are willing to give it a try.**



*Industry Insights from*

**Jennifer Kent**  
Senior Director

## Up to 72% of consumers are open to smartphone-based contact tracing.

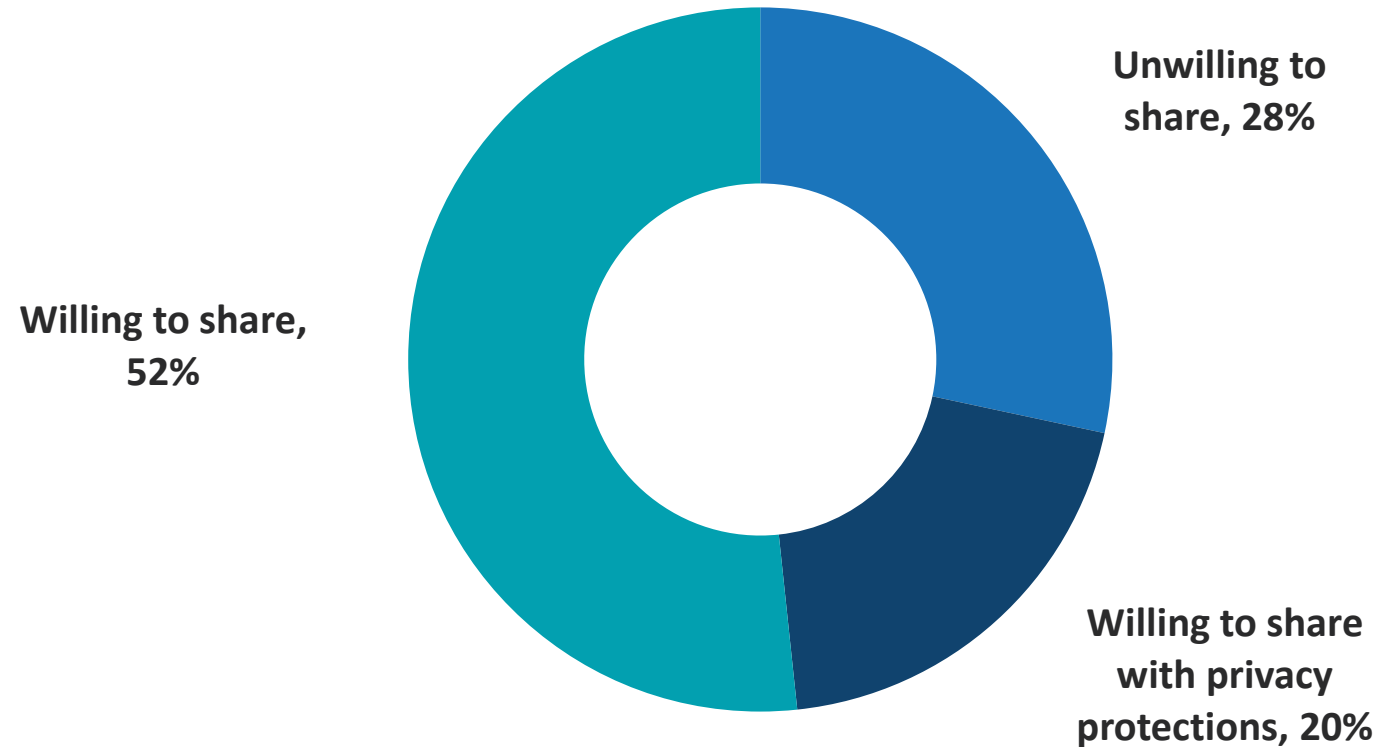
Over half of US broadband households are willing to share smartphone data to aid in COVID-19 contact tracing. An additional 20% are willing if privacy protections are offered.

In total, over 70% of respondents are willing to share data if privacy protections are offered. This indicates a tremendous opportunity to use smartphone apps to help fight the spread of COVID-19.

Younger respondents and higher income households are more likely than others to share smartphone data to aid in contact tracing.

*There is sufficient interest among US consumers to make contact tracing a worthwhile approach, among other methods, to contain the virus. Consumer education from Apple, Google, and public health officials on how to opt-in is critical to drive adoption.*

## Willingness to Share Smartphone Data to Track COVID-19



Among US BB HHs, N =5,008, ±1.38% | "CV2580.Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19? | © 2020 Parks Associates

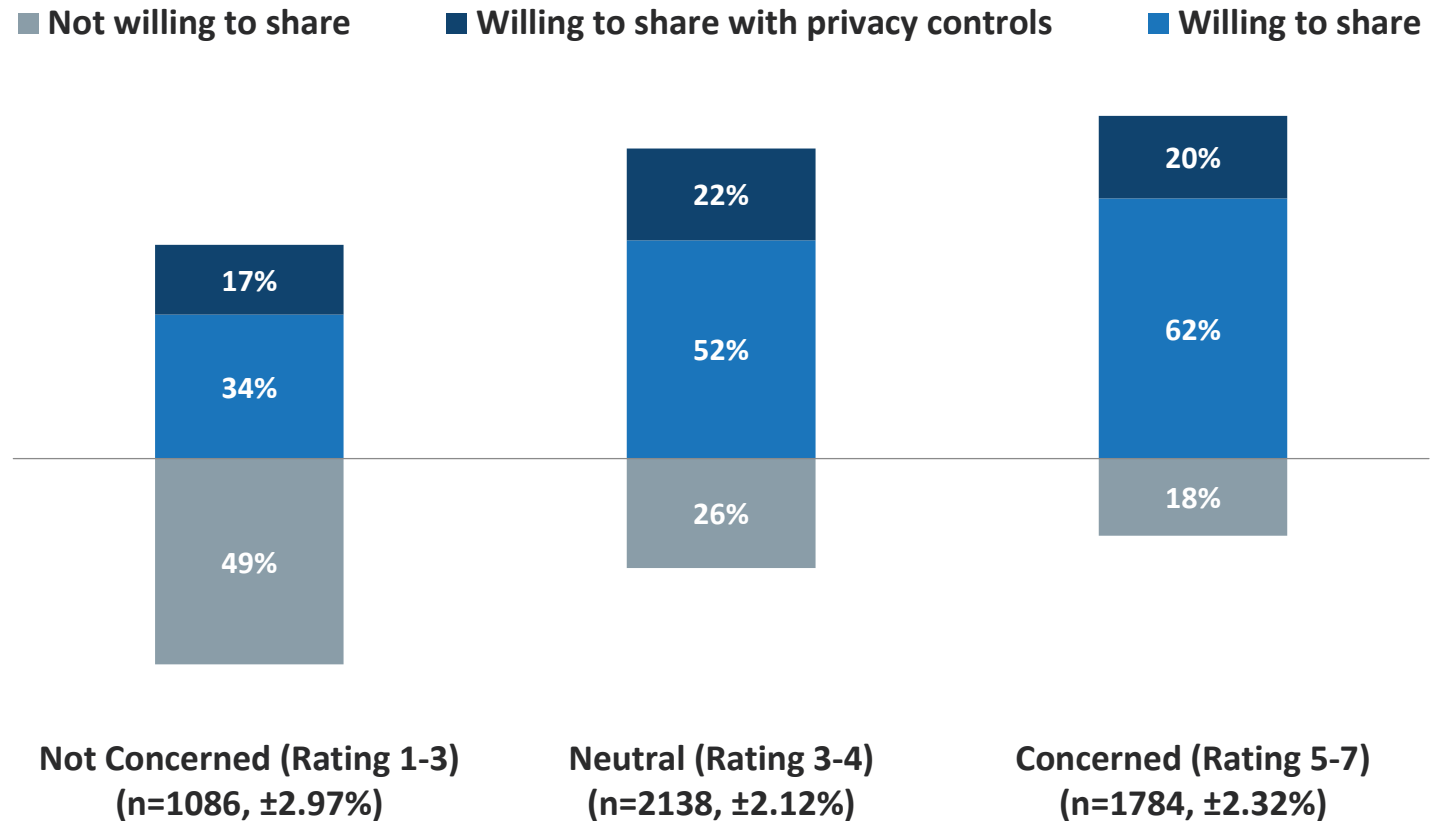
## The degree of concern about COVID-19 affects willingness to share data.

Consumers who report high levels of concern about COVID-19 and feel that others are not taking the virus seriously enough are more likely to report willingness to share smartphone data. Those who feel others are overreacting to the virus are less willing to share data.

This has resulted in an unusual demographic spread. Younger respondents are more willing to share smartphone data than are older respondents, even though the risks of COVID-19 intensify with age. Racial minorities are more willing to share smartphone data than are non-Hispanic whites, although historically these groups may have had negative experiences with the healthcare system or government systems.

*Evidence indicates the political polarization in the US COVID-19 pandemic, and official responses to the pandemic, extends to contact tracing as well. Efforts to drive app adoption may be most effective along political lines.*

## Willingness to Share Smartphone Data for Tracking COVID-19 by Level of Concern about COVID-19





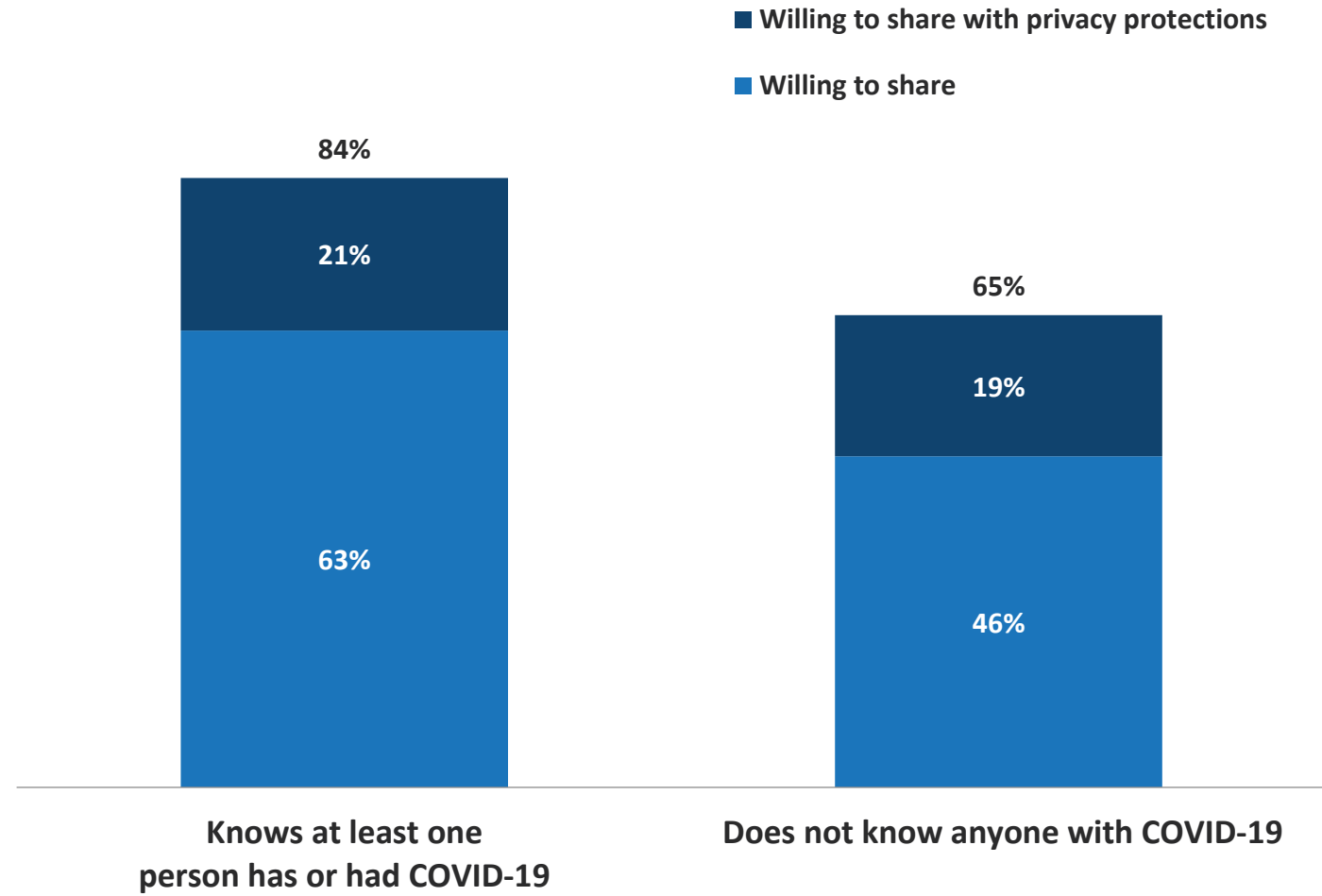
## As COVID-19 progresses, willingness to share data may increase as well.

Consumers are more willing to share their smartphone data if they know someone with or someone who has had COVID-19.

Over 80% of those who know someone who has had or has COVID-19 are willing to share smartphone data, with privacy protections, as compared to about two-thirds of those who do not know someone. This suggests that willingness to share data will increase as the number of COVID-19 cases increases.

*As the incidence of COVID-19 spreads, more people will know someone who has contracted COVID-19, which may increase their willingness to share smartphone data. As of September, the US reports over 6.5M total confirmed cases and 200K confirmed deaths.*

## Willingness to Share Smartphone Data by Relationship with COVID-19 Patients



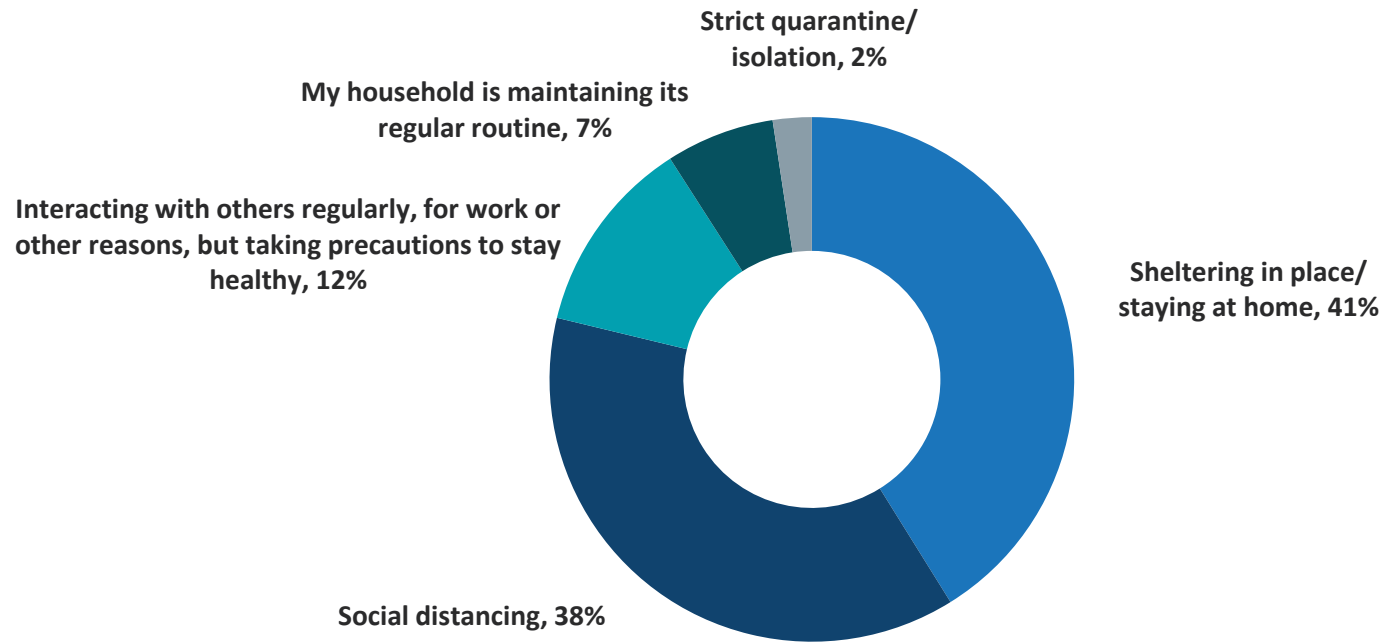
## Consumer Experience with COVID-19

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# Among broadband households, 93% report engaging in lifestyle changes to limit the spread of COVID-19.

## COVID-19 Impact on Personal Habits (May 2020)

Among All US BB HHs, N = 5,008, ±1.38%



As consumers continue their evolution into the COVID-19 “new normal,” there continues to be a significant impact on broadband households’ behavior and spending around consumer technology and products.

In the US, 8 out of 10 households have changed their lifestyles to avoid exposure to the virus. These changes affect consumer behavior and spending, leading consumers to be more conservative in their spending and overall participation in the broader economy.

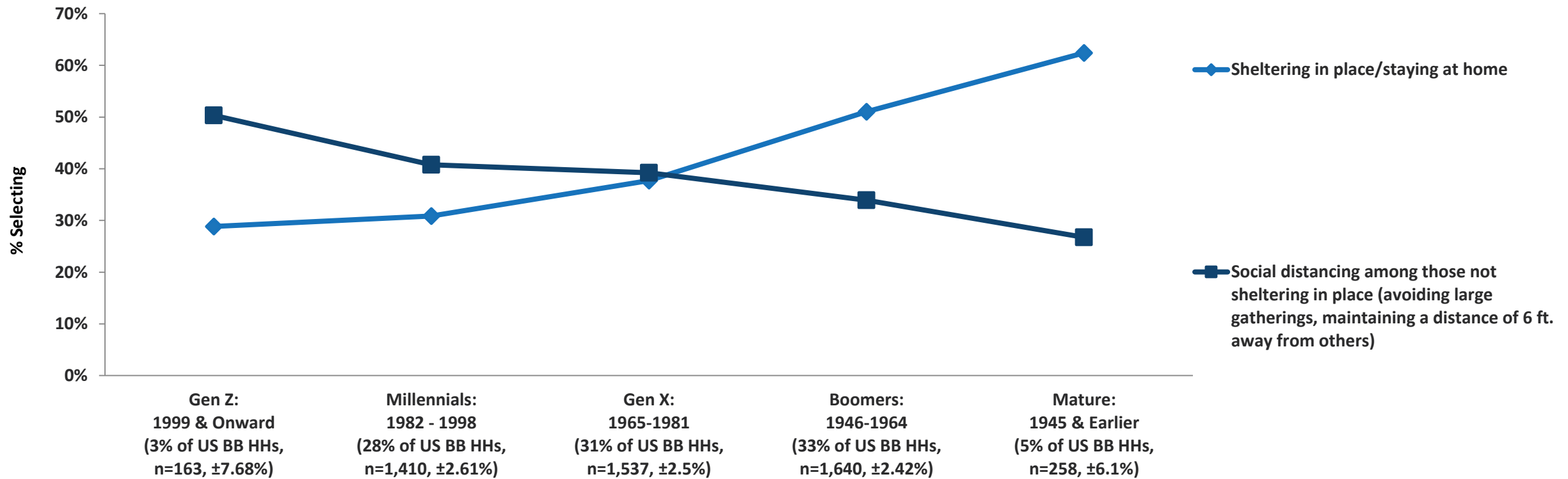
Until consumers are confident about interacting with their community, meaningful improvement in their spending will not occur.

"CV2507. Which of the following best describe your personal habits currently?"

Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

**While older generations are more likely to shelter in place during COVID-19, younger generations are more likely to engage in social distancing outside of the home.**

### COVID-19 Impact on Personal Habits by Generation (May 2020) Among All US BB Respondents



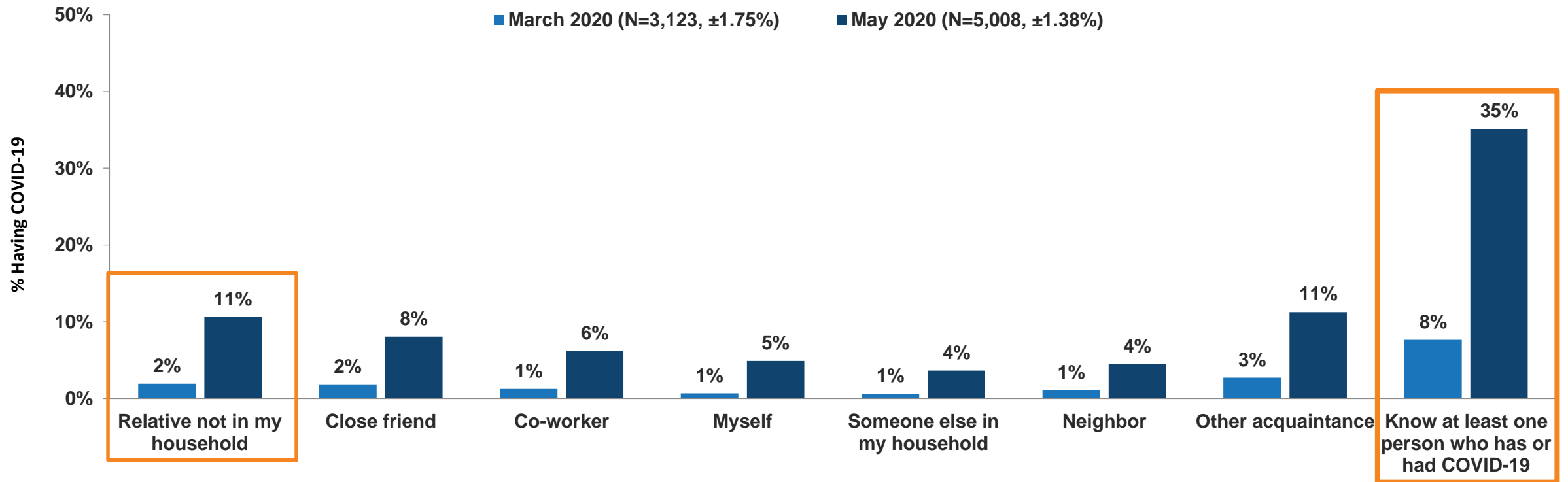
"CV2507. Which of the following best describe your personal habits currently?"

Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

As the infection rates increased going into May 2020, the relationship with COVID-19 became more “personal,” making COVID-19 much more “real.”

### Relationship with COVID-19 Patients

Among All US BB HHs Surveyed



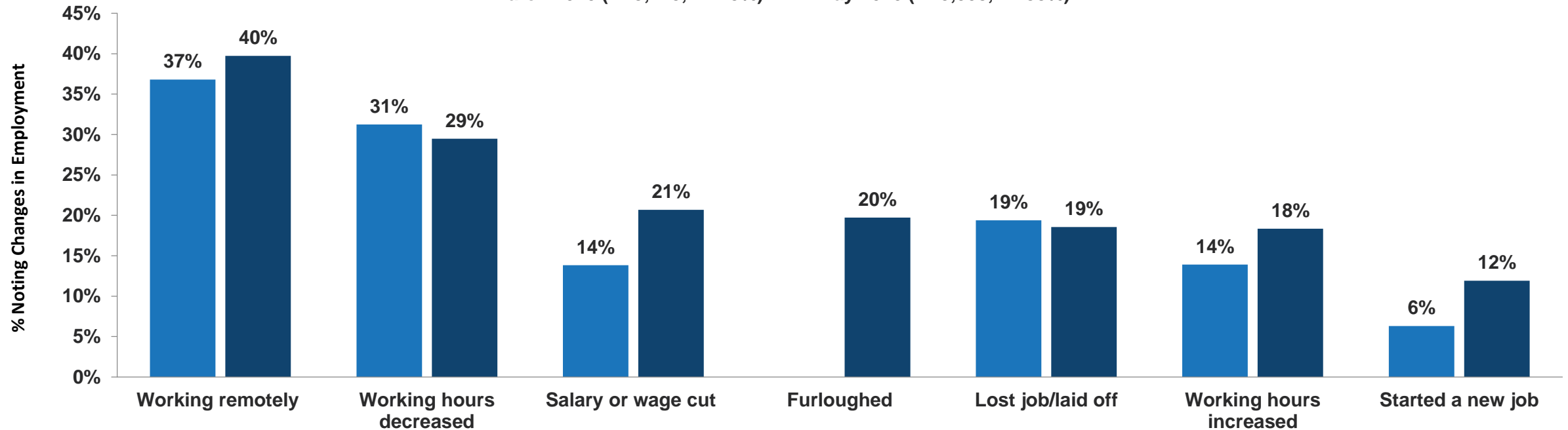
“CV2515. Do you personally know anyone that has or had COVID-19?” | Source: Multiple Surveys: American Broadband Households and Their Technologies | © 2020 Parks Associates

After an enormous initial hit on employment and an increase in people working remotely in late March, the affect of COVID-19 leveled off; however, as states began to open, cases increased dramatically. That will influence returning to work locations and cause continuing unemployment.

## COVID-19 Impact on Employment Status

Among All US BB HHs Surveyed

■ March 2020 (N=3,123, ±1.75%)    ■ May 2020 (N=5,008, ±1.38%)

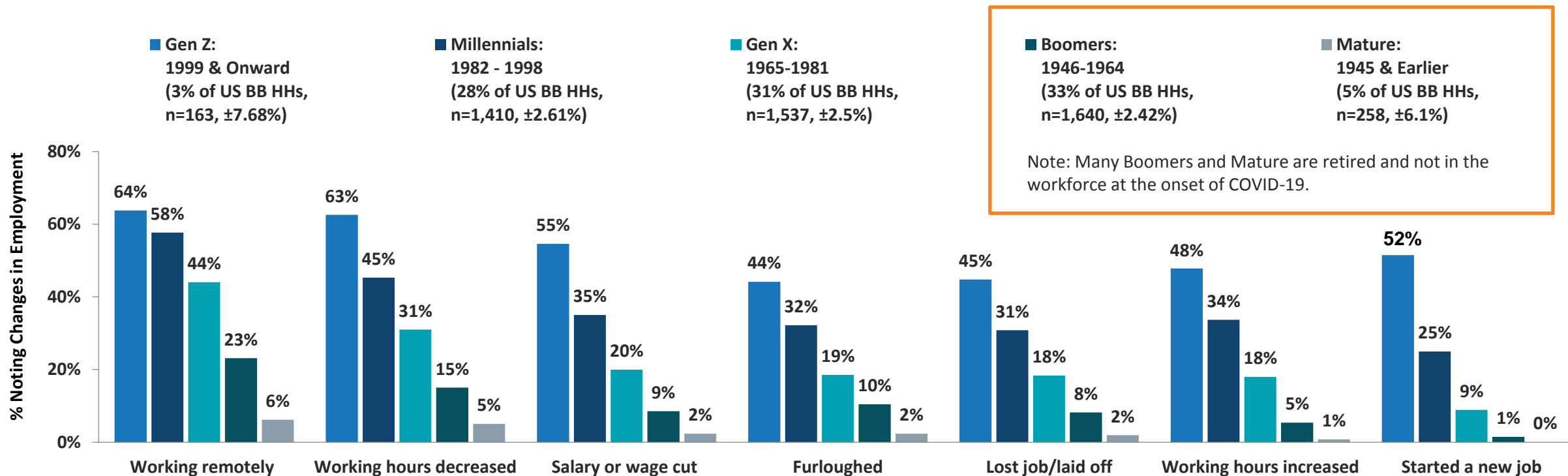


“CV2500. How has the COVID-19 crisis impacted your employment, or that of others in your household?”  
Source: Multiple Surveys: American Broadband Households and Their Technologies | © 2020 Parks Associates

Young generations groups have borne a significant amount of the COVID-19 impact on employment status; also, these groups, most often the households with children at home, contribute heavily to the spending on consumer electronics and services.

### COVID-19 Impact on Employment Status by Generation (May 2020)

Among All US BB Respondents



“CV2500. How has the COVID-19 crisis impacted your employment, or that of others in your household?”  
 Source: American Broadband Households and Their Technologies May 2020 | N=10,000, ±0.98% | © 2020 Parks Associates

## Data Sharing and Privacy Protections

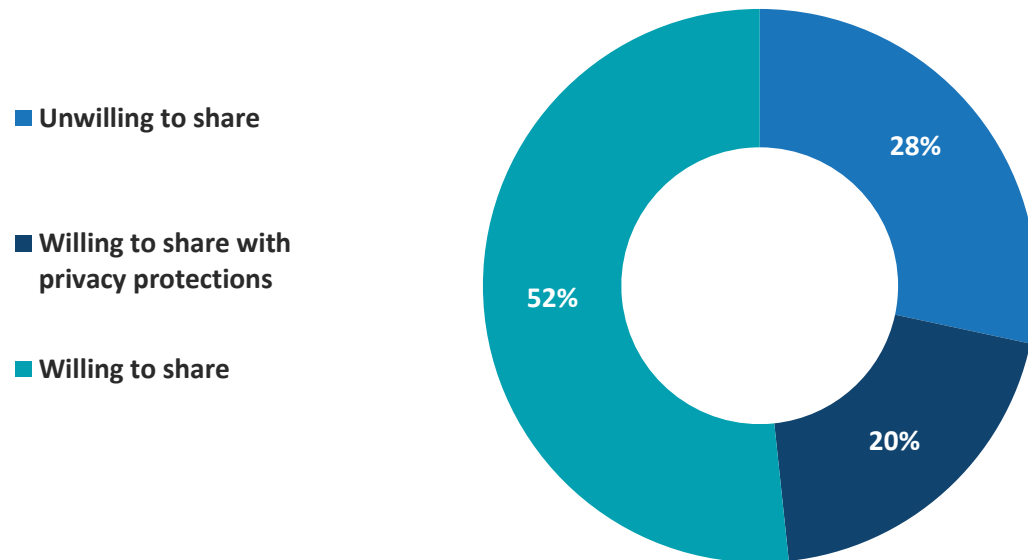
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**Over half of US broadband households are willing to share smartphone data to aid in COVID-19 contact tracing – an additional 20% are willing if privacy protections are offered.**

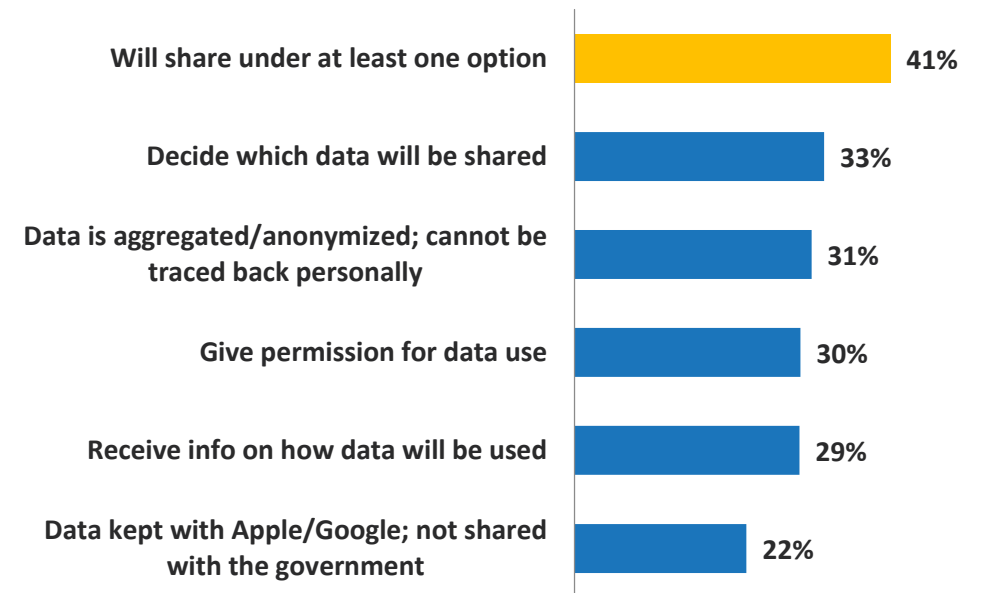
### Willingness to Share Smartphone Data to Track COVID-19 (May 2020)

Among US BB HHs , N = 5,008, ±1.38%



### Privacy Protections That Will Convince Smartphone Users to Share Data (May 2020)

Among Those Unwilling to Share Data, N = 2,420, 1.99%



"CV2580.Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19? | Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

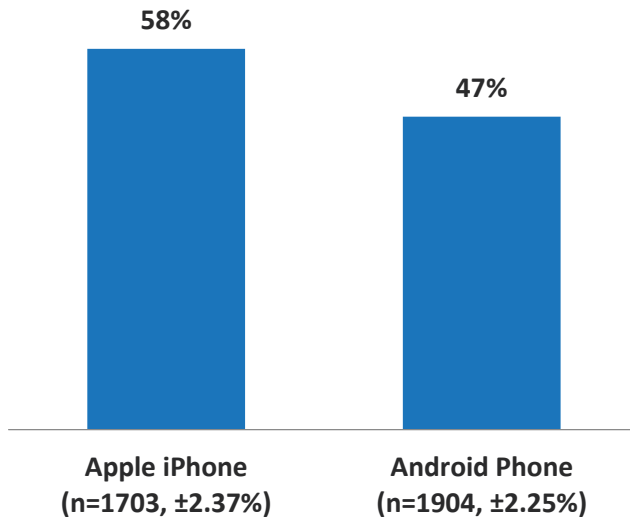
"CV2585.Would you share your smartphone data to help monitor and track the spread of COVID-19 in the following situations? I would share my data if..." | Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

**Those who have experienced COVID-19 symptoms are more willing to share data than those who have not. iPhone owners are more willing to share than Android owners.**

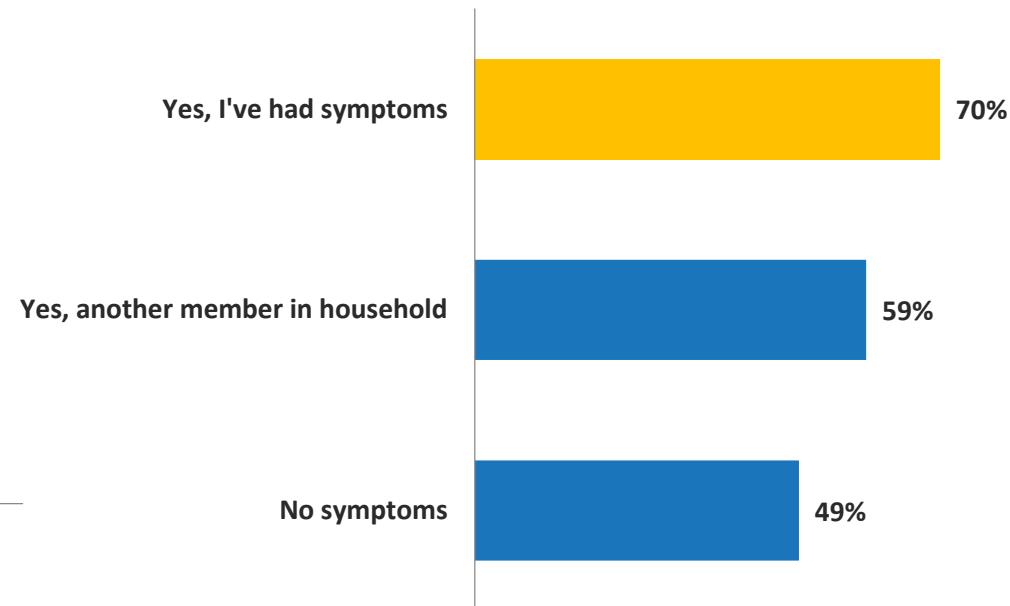
## Willingness to Share Smartphone Data to Track COVID-19 (Q2/20)

Among Heads of US Broadband Households in Select Groups

### By Smartphone OS



### By Presence of COVID-19 Symptoms



Those having first-hand experience with COVID-19 understand the seriousness of the condition and the importance of contact tracing. The tradeoff between privacy vs. public health benefit tips in favor of the latter for these consumers. Moreover, nearly half of those without symptom experience are willing to share their smartphone data.

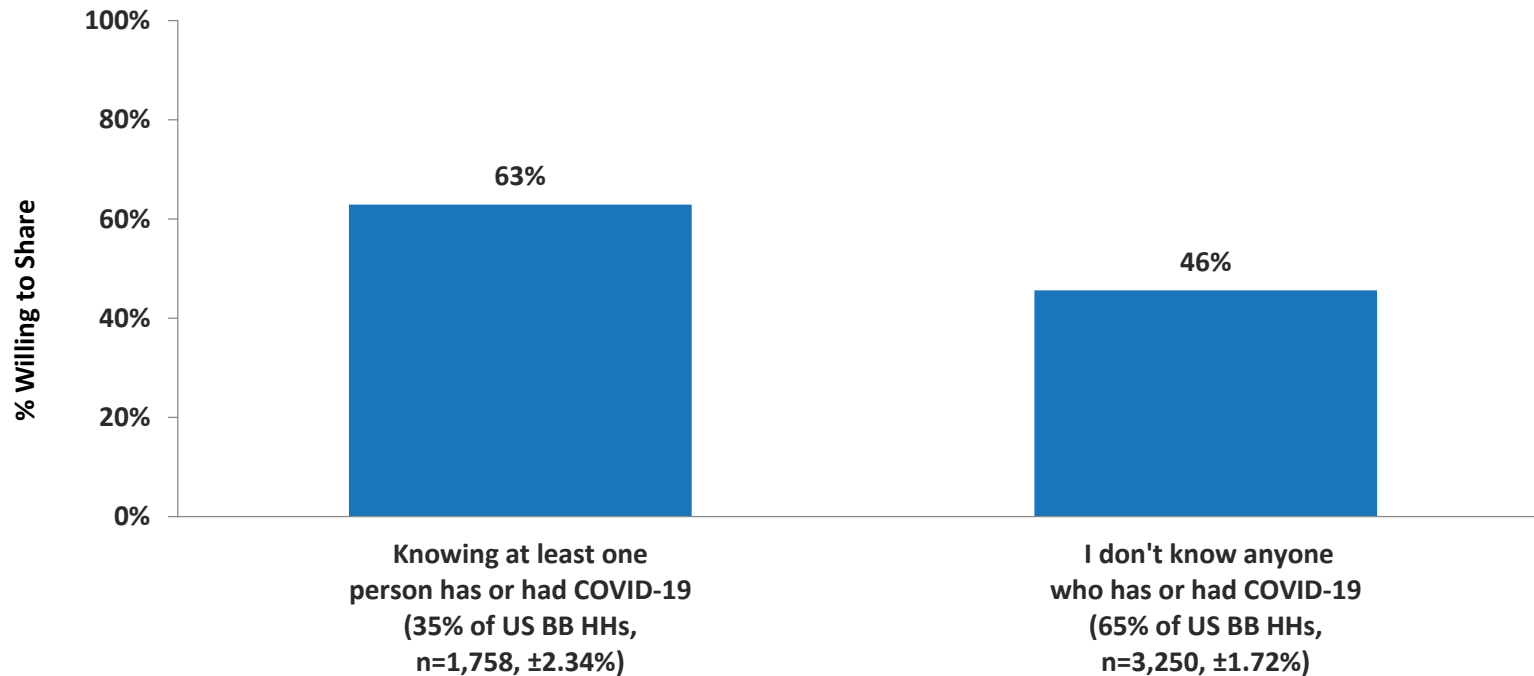
Apple and Google together developed an API that public health officials can use to build contact-tracing apps. In the U.S., however, adoption of this solution by the states has been slow. To combat this, Apple and Google developed a program, called *Exposure Notification Express*, where they would develop the apps for states themselves. As of mid-September, 10 states have signed on and over 25 have expressed interest.

"CV2585. Would you share your smartphone data to help monitor and track the spread of COVID-19 in the following situations?" | Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

**63% of those who know someone with COVID-19 express a strong inclination to share smartphone data to aid in COVID-19 contact tracing compared to the 52% average.**

### Willingness to Share Smartphone Data by Relationship with COVID-19 Patients (Q2/20)

Among US BB HHs in Specified Groups



"CV2515. Do you personally know anyone that has or had COVID-19?"

| "CV2580. Would you share data from your smartphone if it helped to monitor and track the spread of COVID19? |

Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.93% | © 2020 Parks Associates

The prevalence of COVID-19 has increased since May 2020. As of September 14<sup>th</sup>, the Center for Disease Control reports that over 6.5M Americans have been diagnosed with COVID; nearly 200K who have been diagnosed have died.

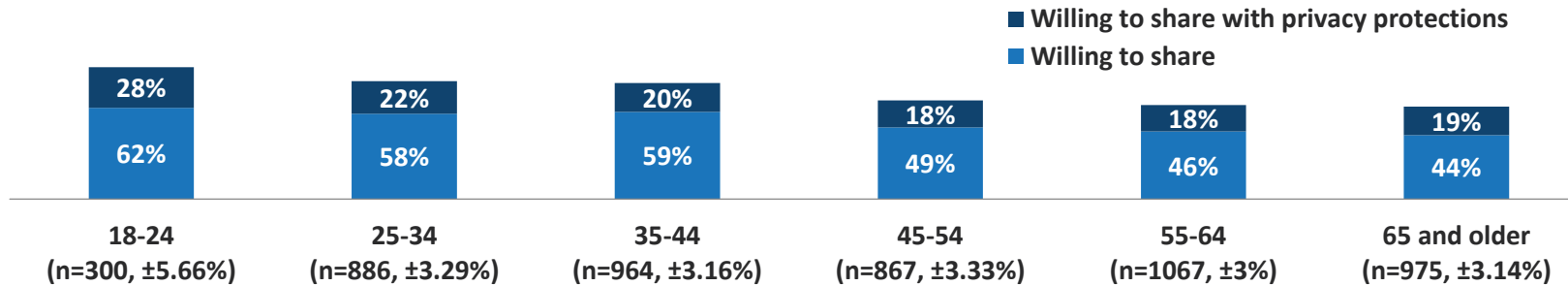
As per the CDC, between September 7<sup>th</sup> and September 14<sup>th</sup>, over 240K Americans were newly diagnosed with COVID-19. This is a decrease from the height of July, but still above the rates seen in and before June.

As states continue their reopening plans, and an increasing number of schools resume in-person classes, COVID-19 infections are likely to accelerate. Fear surrounds a 'second wave.'

Demographically, age has the greatest influence on a willingness to share smartphone data. In addition, income influences willingness to share smartphone data.

### Willingness to Share Smartphone Data by Age Group (May 2020)

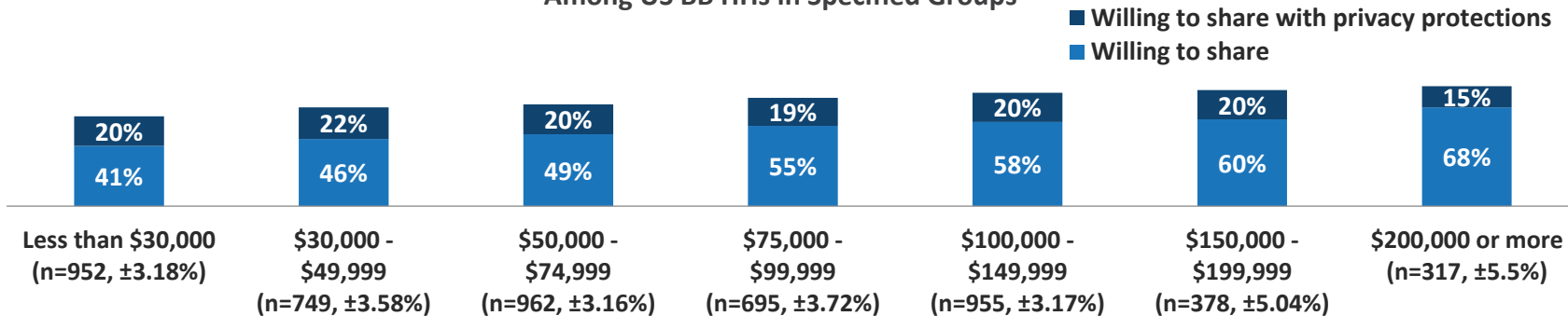
Among US BB HHs in Specified Groups



Among those ages 18-24, 90% are willing to share smartphone data if privacy protections are offered. In contrast, just over 63% of those age 65+ are willing to share data.

### Willingness to Share Smartphone Data by HH Income (May 2020)

Among US BB HHs in Specified Groups



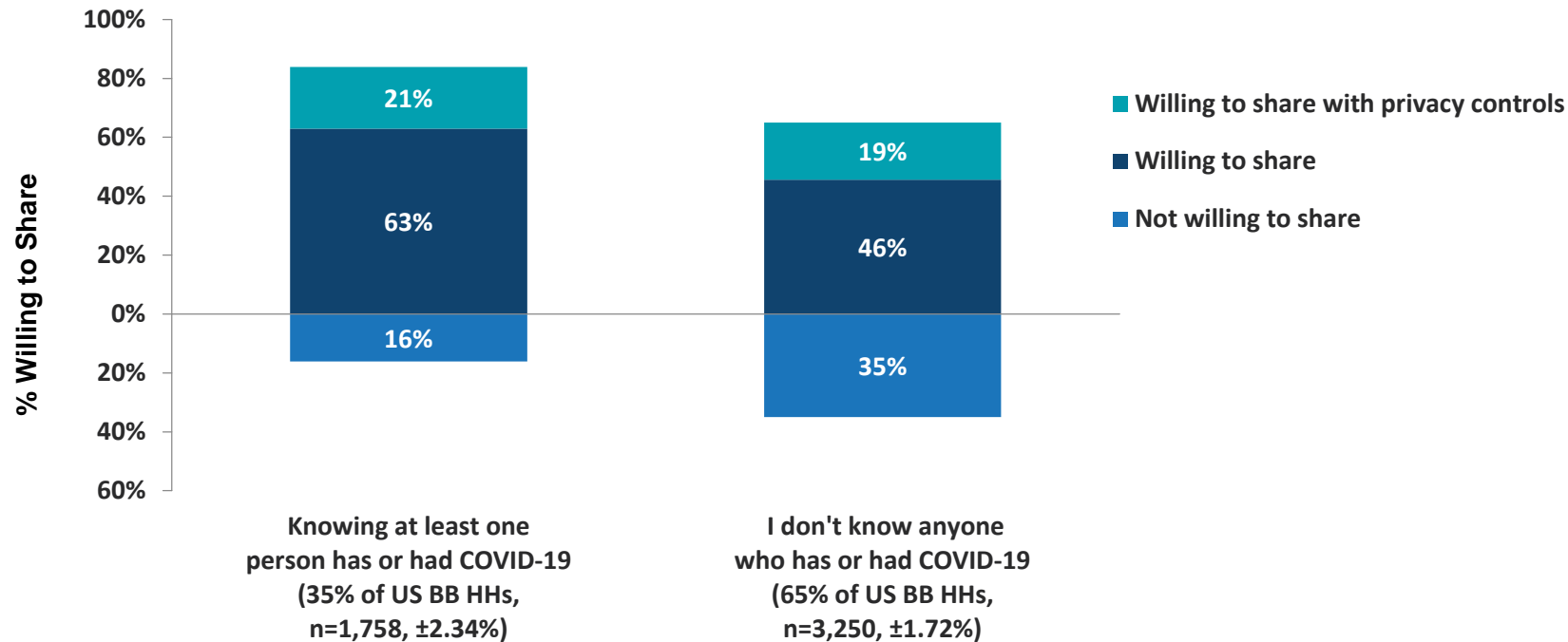
Higher income households and those with higher levels of education are more likely than lower income households and those with lower educational attainment (see Appendix) to share their data.

“DT1000.When were you born?” “CV2580.Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19? DT1010.What was your approximate TOTAL annual HOUSEHOLD income, not personal income, in 2019 before taxes?” Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

# Willingness to share data is also influenced by personally knowing someone with COVID-19.

## Willingness to Share Smartphone Data by Relationship with COVID-19 Patients (May 20)

Among US BB HHs in Specified Groups



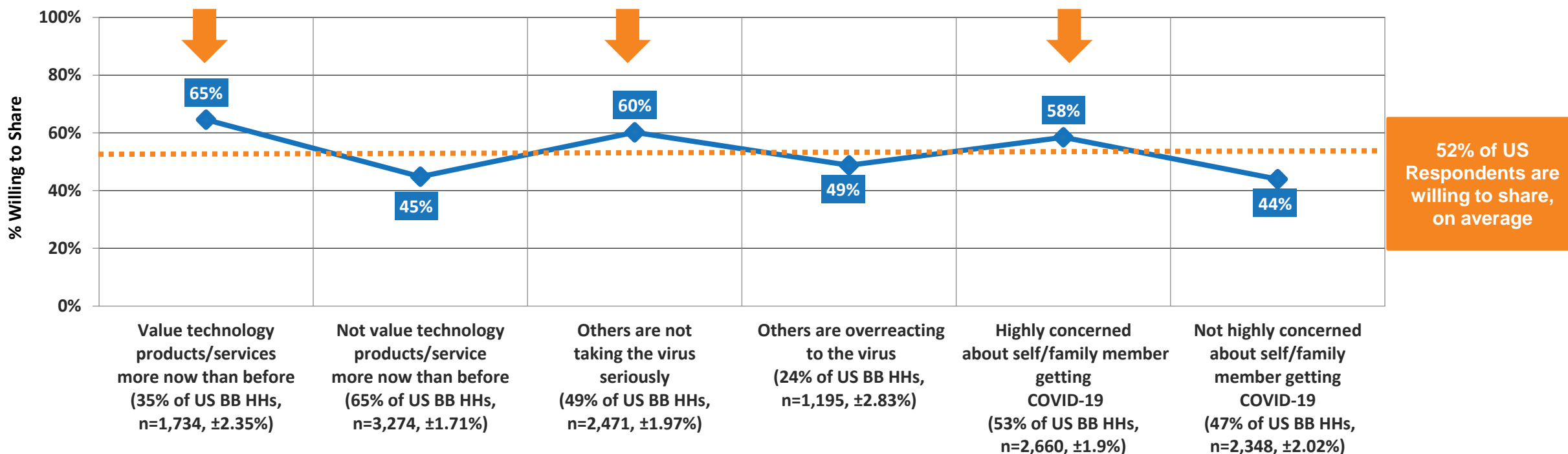
Knowing someone who has had COVID-19 influences the willingness to share data even more than age and income.

"CV2515. Do you personally know anyone that has or had COVID-19?"  
| "CV2580. Would you share data from your smartphone if it helped to monitor and track the spread of COVID19?" |  
Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.93% | © 2020 Parks Associates

Those who report valuing technology more now than before the pandemic, those who claim others are not taking the virus seriously, or those with high concerns about contracting COVID -19 report above-average willingness to share data for COVID-19 contact tracing.

## Willingness to Share Smartphone Data by Consumer Attitudes (Q2/20)

Among US BB HHs in Specified Groups

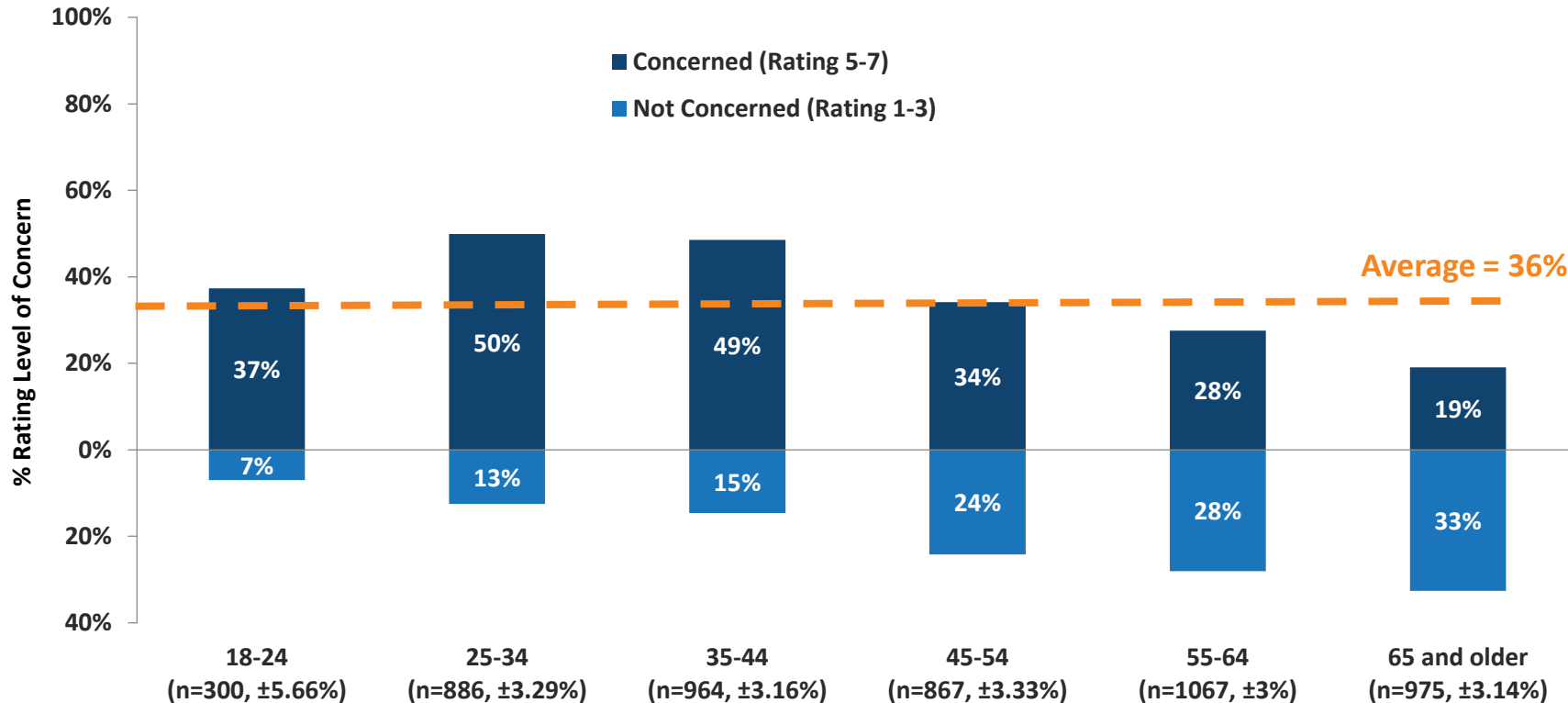


“CV2520. Please rate your level of agreement with the following statements about how the coronavirus/COVID-19 has impacted your behavior.”  
 “CV2510. How concerned are you about the following?” | “CV2580. Would you share data from your smartphone if it helped to monitor and track the spread of COVID19? |  
 Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.93% | © 2020 Parks Associates

# Surprisingly, younger respondents are more likely than older ones to be concerned about COVID-19.

## Average Level of Concern about COVID-19 by Age Groups (Q2/20)

Among US BB HHs in Specified Age Groups



"CV2510. How concerned are you about the following? DT1000. When were you born?"

Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

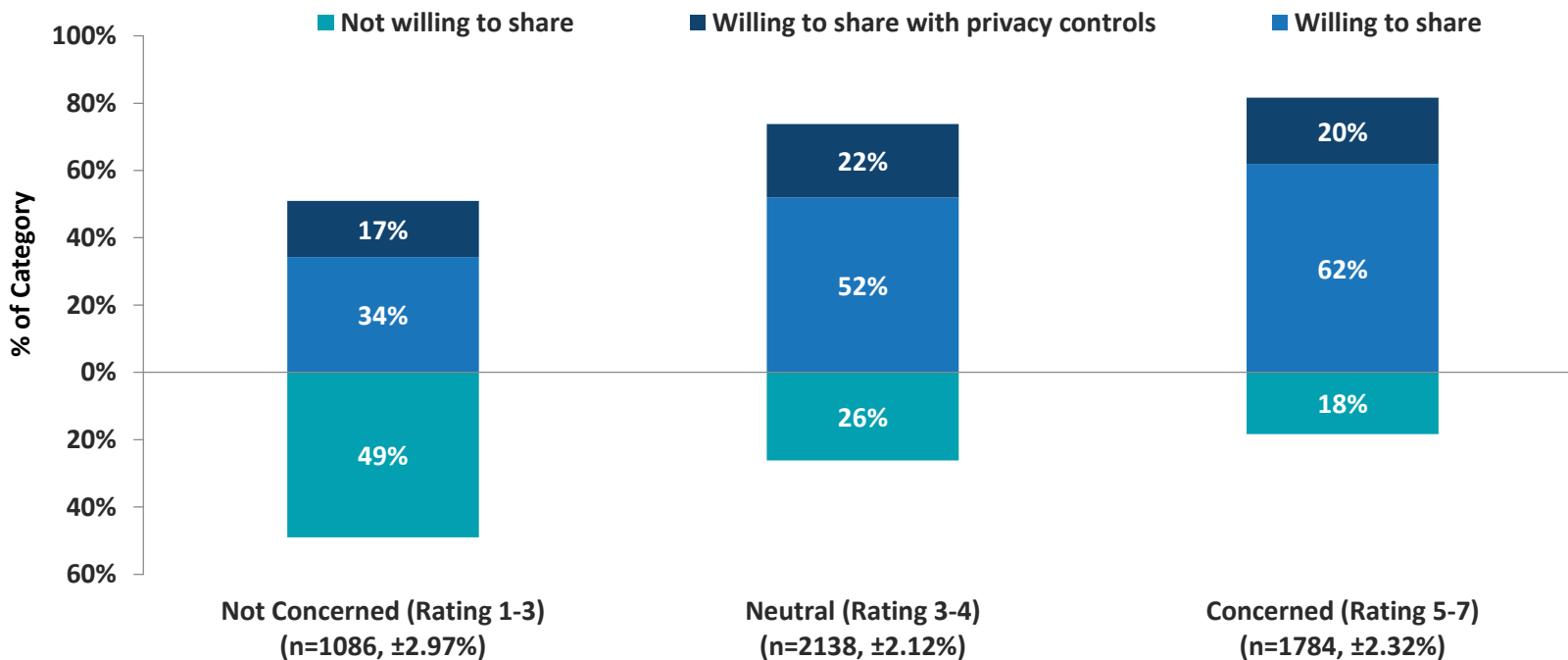
The health risks associated with COVID-19 increases with age. It is therefore surprising to see that older adults are substantially less concerned about the COVID-19 outbreak than younger ones.

Even among those 18-24, just 7% are "unconcerned" as compared to one-third of those age 65+. At the same time, the percentage of 18-24 year olds "concerned" is lower than the percentage concerned among those 25-44 because of a relatively large number of 18-24 years olds that are "neutral".

Reasons for less concern among older generations may include the propensity for older Americans to shelter-in-place and remain removed from groups of people. Young adults are typically involved in multiple social activities.

# The higher the level of concern about COVID-19, the greater the willingness to share smartphone data.

## Willingness to Share Smartphone Data for Tracking COVID-19 by Average Level of Concern about COVID-19 (Q2/20) Among US BB HHs in Specified Groups



Those concerned about the COVID-19 outbreak are, overwhelmingly, willing to share smartphone data. Those unconcerned, however, are divided with roughly one-half willing to share and one-half unwilling to share. This suggests that willingness to share data will change as the level of concern increases/decreases.

The level of concern about COVID-19 has a greater influence on willingness to share data than age and income. Level of education notably increases a willingness to share data.

The fact that younger respondents are, on average, more concerned than older ones partially explains why younger respondents are more willing to share their smartphone data.

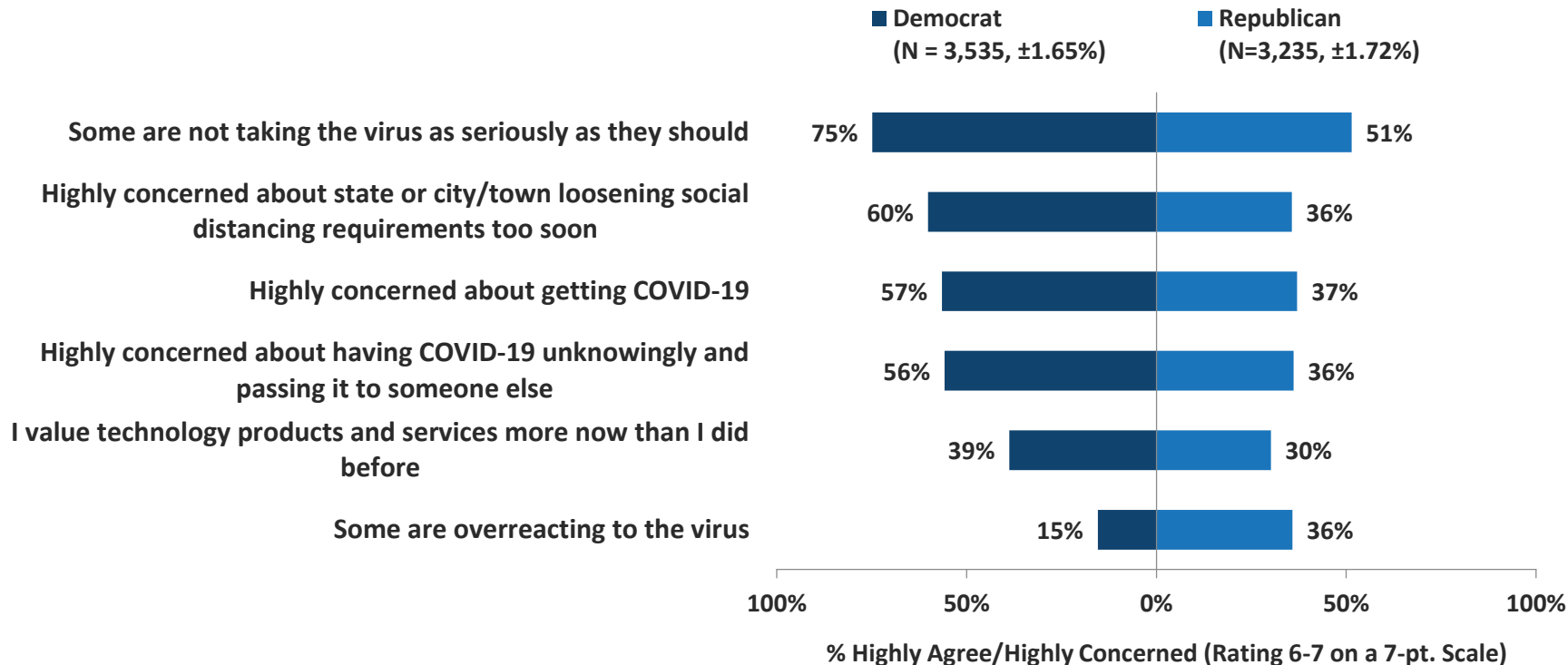
"CV2510. How concerned are you about the following? "CV2580. Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19?"  
Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates



# Attitudes towards COVID-19 and the response to the pandemic differs according to respondents' political affiliation.

## Attitudes Towards COVID-19 by Political Affiliation (July 20)

Among US BB HHs in Specified Groups



"CV2510. How concerned are you about the following?" | "Please rate your level of agreement with the following statements about how the coronavirus/COVID-19 has impacted your behavior." | Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.93% | © 2020 Parks Associates

75% of respondents who identify as Democrats strongly agree that some are not taking the virus as seriously as they should, compared with just 51% of those who identify as Republican. Democrats are also significantly more likely to have high concerns about getting COVID-19 and passing it to others unknowingly.

Willingness to share smartphone data for contact tracing correlates with concern about the virus itself. As views on the pandemic, and policy makers' response to the pandemic, differs along party lines, so may consumers' attitudes towards contact tracing.

NB: Willingness to participate in smartphone-based contact tracing was not tested specifically by political affiliation.

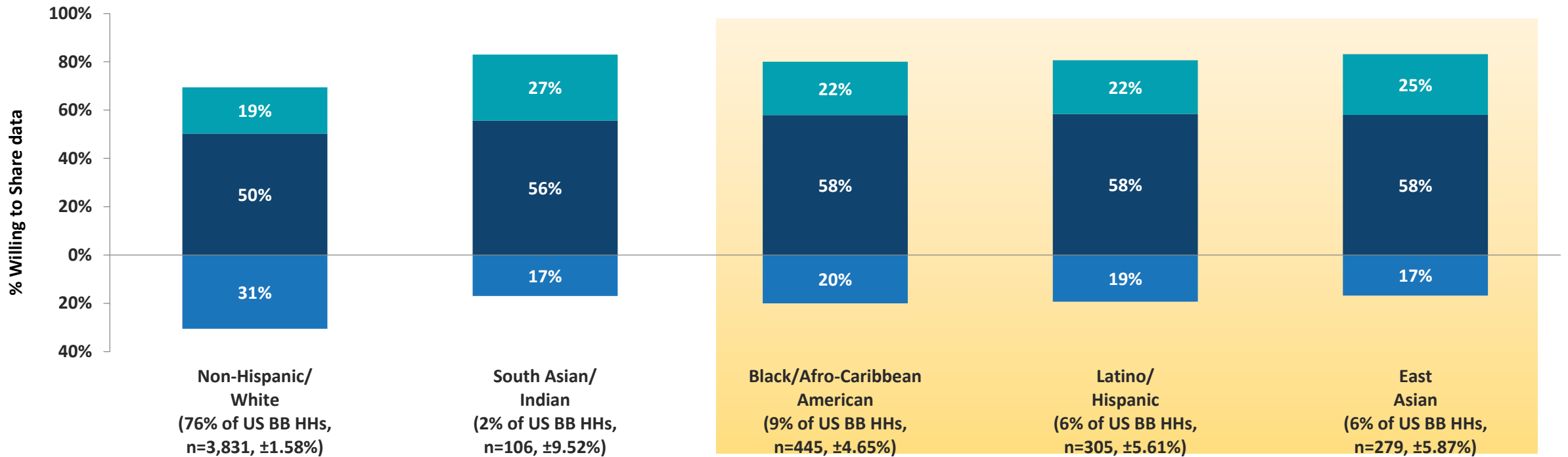
## Appendix

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# Asian, Latino Hispanic, and Black American are more likely than others to be willing to share their data for COVID-19 tracing.

## Willingness to Share Smartphone Data by Ethnicity (Q2/20)

Among US BB HHs in Specified Groups

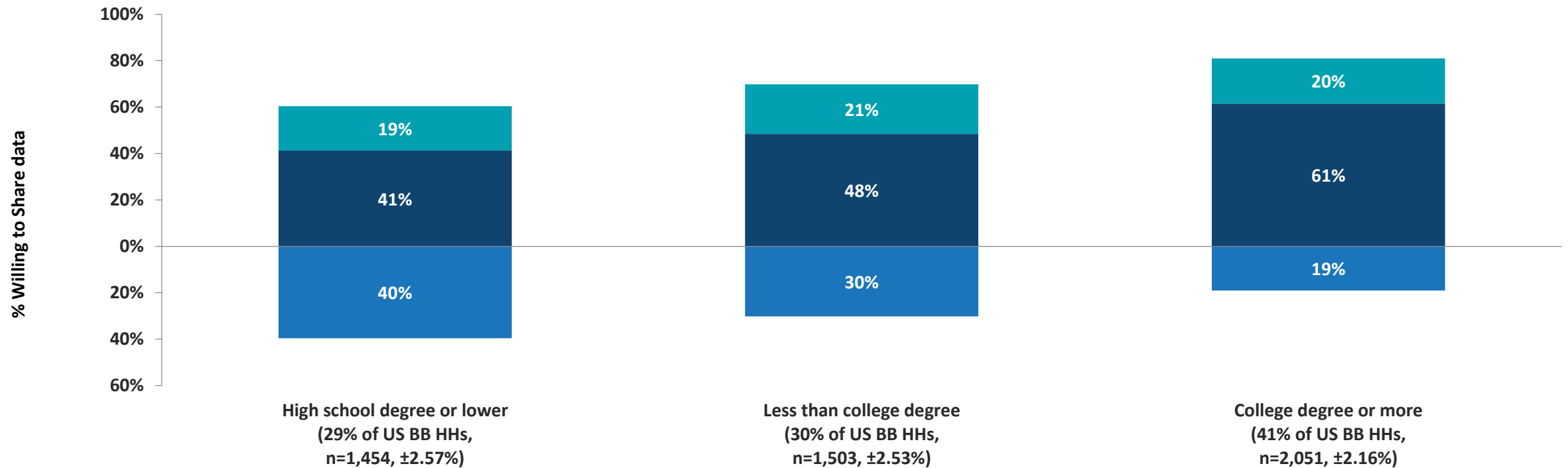


“CV2580.Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19?  
 DT1180.Which of the following best represents your racial or ethnic heritage? Please select all that apply.”  
 Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

# Respondents with higher levels of education are more likely to report a willingness to share their smartphone data.

## Willingness to Share Smartphone Data by Education Levels (Q2/20)

Among US BB HHs in Specified Groups

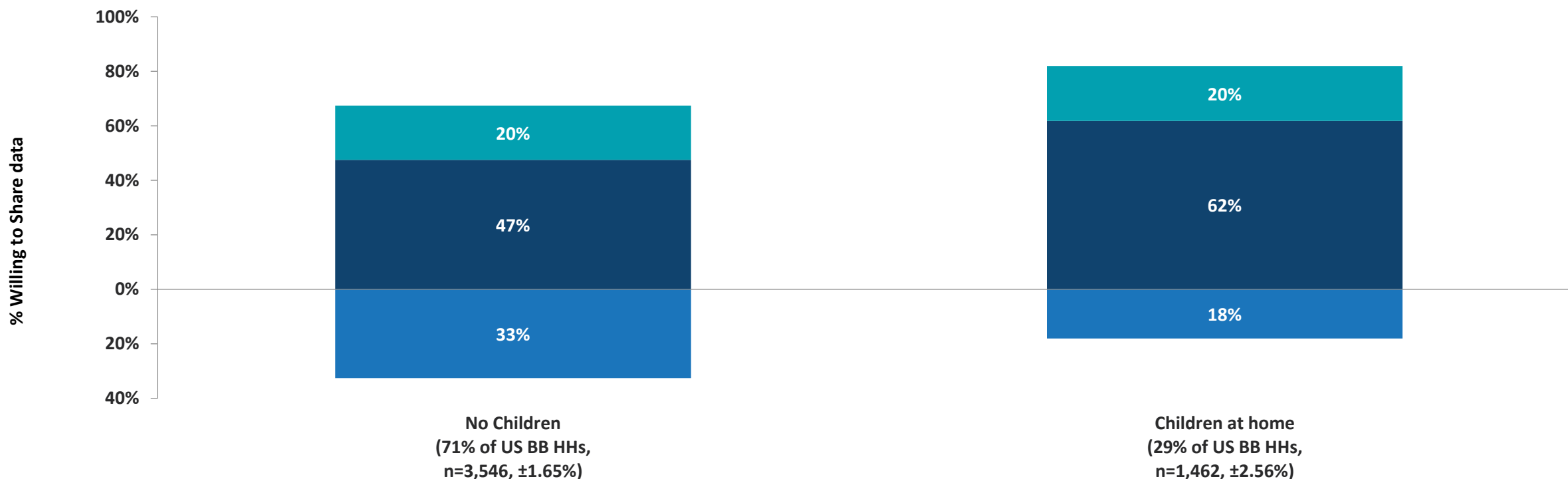


“CV2580.Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19?” | “DT1015.What is the highest level of education that you have achieved?”  
Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

The presence of children in the home is a significant influence on sharing data. Those with children at home are more likely to report a willingness to share smartphone data.

### Willingness to Share Smartphone Data by Household with Children (Q2/20)

Among US BB HHs in Specified Groups

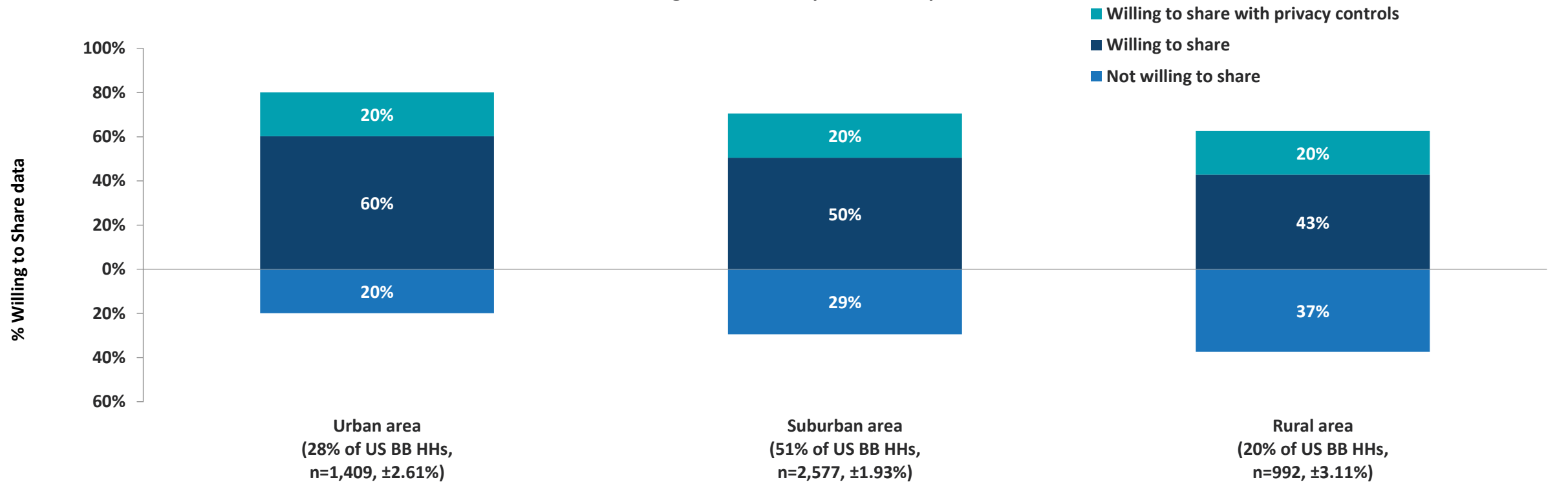


“CV2580. Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19?” | “DT1025. How many people UNDER THE AGE OF 18 live in your household?”  
Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

Those living in an urban area express a stronger inclination towards sharing data for COVID–19 contact tracing. The difference is striking between rural and urban communities.

## Willingness to Share Smartphone Data by Residential Area (Q2/20)

Among US BB HHs in Specified Groups



“CV2580.Would you share data from your smartphone if it helped to monitor and track the spread of COVID-19?  
DT1175. In thinking about the city/town where you live, which of the following would you say that you live in?”  
Source: American Broadband Households and Their Technologies May 2020 | N=5,008, ±1.38% | © 2020 Parks Associates

# Defining Heads of Broadband Households

## All survey respondents are heads-of-household age 18 and older

- *A head of household* has equal or greater decision making responsibility for purchasing technology products/services.

## All survey respondents have broadband internet access at home

- *Broadband households (BB HHs)* have access to broadband internet service in their home, delivered to fixed or mobile devices. BB HHs may use multiple methods of accessing broadband internet at home.
- *Fixed broadband households* have broadband internet service to a fixed point in their home through one of the following:
  - a) DSL or fiber optic high-speed Internet services from a telephone company
  - b) Cable high-speed Internet services from a cable company
  - c) Satellite broadband service
  - d) A fixed wireless or 5G home Internet service
- *Mobile broadband households* have broadband internet service to a mobile point in their home through one of the following:
  - a) A smartphone's mobile data plan
  - b) A tablet/iPad's mobile data plan
  - c) A laptop computer with mobile data service
- *Mobile-only broadband households* use one of the mobile broadband options but no fixed broadband option in the home.
- As of year-end 2019, Parks Associates estimates 87% of all US households have broadband in their home.

# Reading Parks Associates Charts

**Question wording**—with some modification for sizing.

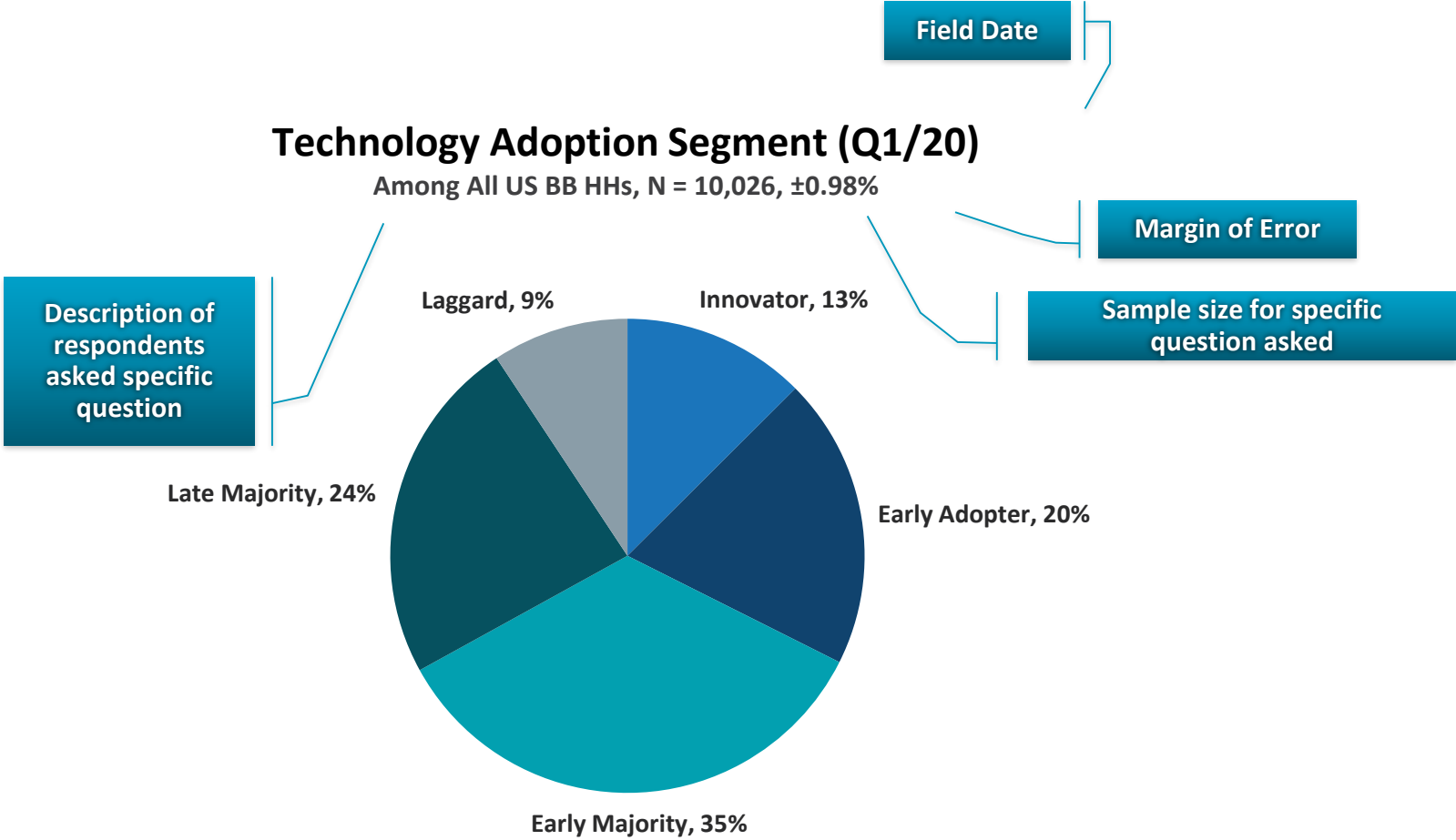
**Field date**—the period during which consumers responded.

**Survey sample size**—the number of respondents.

**Margin of error**—the statistical range within which a response from the actual population would fall 95% of the time. For example, a survey result of 37% with a margin of error of plus or minus 0.98%, means that 95% of the time, the true adoption level within the represented population (in this case all US broadband households) will be within the range of 36% to 38%.

## Technology Adoption Segment (Q1/20)

Among All US BB HHs, N = 10,026, ±0.98%



Field Date

Margin of Error

Sample size for specific question asked

Description of respondents asked specific question

Question Wording

"Q9000.Which of the following best describes your purchasing habits?"

Source: American Broadband Households and Their Technologies Q1 2020 | N=10,026, ±0.98% | © 2020 Parks Associates

Sample Size of Full Study



# Definitions and Abbreviations

**BB HHs**                      Broadband Households

**Parks Associates uses a 7-pt Likert scale to measure appeal, intention to purchase, and other attributes. We use the following terms for scores.**

- Non-intenders/Low or No Intention/Appeal                              1-3
- Neutral    4
- Intenders/Appeal/Likely to Buy    5-7
- High Intenders/Highly Appealing/Highly Likely to Buy    6-7

# Attribution

## Project Leaders



**Kristen Hanich**  
Senior Analyst



**Yilan Jiang**  
Director

## Contributors



**Keshav Jaiswal**  
Consumer Insights Analyst II



**Xiaofan Tan**  
Consumer Insights Analyst I



**Sharon Jiang**  
Research Analytics Intern

## Published by Parks Associates

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EE JMK 9.17.20

Analyst

# Additional Research from Parks Associates

## Consumer Analytics Research

- COVID-19: Impact on Telehealth Use and Perspectives (Q3/20)
- Connected Health, Wearables, and Fitness (Q3/20)
- COVID-19: Impact on Communications and Entertainment (Q3/20)
- COVID-19: Impact on Consumer Behavior and Spending (Q2/20)
- Independent Living: Senior and Caregiver Perspectives (Q3/19)
- Smart Home Strategy - Capturing the Cost-Conscious Consumer (Q2/20)
- Smart Home Buyer Journey and User Experience (Q2/20)

## Industry Reports

- Enabling Independence: Connected Solutions for Seniors and Caregivers (Q4/19)
- Smart Home Platforms for Health (Q2/19)
- Connected Entertainment Ecosystems (Q2/20)
- Competition in Residential Security (Q1/20)
- Onboarding and Technical Support for the Smart Home (Q4/19)

## Industry Trackers

- OTT Video Tracker (Monthly)
- Smart Home Tracker (Quarterly)
- DIY Home Security Tracker (Quarterly)

# We Want to Hear from You!

The Consumer Analytics team provides quantitative market intelligence that guides strategic business decisions. We explain market trends, predict how consumers will react to innovations, and recommend strategies for thriving in a changing business environment. We also welcome any direct comments to the author of the report or to Jennifer Kent, Senior Director, at [Jennifer.kent@parksassociates.com](mailto:Jennifer.kent@parksassociates.com).

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## ANALYST READOUTS

Read-outs are a way to ask questions and learn more about the study. If you would like a presentation, let us know!

