SYNOPSIS

**360 View: Health and Independent Living** examines consumer needs, behaviors, and preferences in healthcare engagement and technology. The research provides an analysis of existing and anticipated independent living needs among people ages 50 and older. It explores consumers’ motivation and perception about aging, analyzes key needs categories for independent living, explores their role as caregivers and resulting impact on their thinking about independent living, and tests their interest and likelihood to buy selected solutions/services, including those enabled by smart home technologies and products.

**ANALYST INSIGHT**

“The in-person office visit is the traditional foundation for the doctor-patient relationship, but as healthcare costs continue to increase, even this enduring standard of care is under consideration for changes. The push to engage consumers outside of the facility, combined with advances in consumer technology, has created several distinct markets for connected health products and services.”

― Jennifer Kent, Senior Research Director, Parks Associates

Number of Slides: 128
CONTENTS

Key Questions Answered

Key Terms

Executive Summary
  • Industry Insight
  • Key Findings and Market Impact

Health Insurance, Health Habits, and Concerns
  • Health Insurance (2010 - 2018)
  • Average Frequency of Participation in Health Behaviors During the Past 30 Days (2014 - 2018)
  • Trends in Consumer Personal Health Concerns (2016 - 2018)
  • Perceived Health Management Needs (2016 - 2018)
  • Comfort in Completing Health Activities (2016 - 2018)
  • Trends in Interest in Health Support Services (2016 - 2018)

Chronic Condition Incidence and Needs
  • Number of Chronic Conditions, Including Obesity (2016 - 2018)
  • Presence of Chronic Conditions (2016 - 2018)
  • Difficulty in Completing Health Tasks (2016 - 2018)
  • Perceived Health Management Needs by Chronic Conditions (Q2/18)
  • Tools/Support That Can Help to Better Manage a Chronic Condition (2017 - 2018)

Connected Health and Wellness Device and App Use

Connected Health Devices: Adoption and Purchase Drivers
  • Overall Adoption of Connected Health Devices (2014 - 2018)
  • Number of Connected Health Devices Owned (2013 - 2018)
  • Health Device Ownership by Category (Q2/18)
  • Importance of Purchase Factors for Connected Health Devices (Q2/18)
  • Important Purchase Factors for Connected Health Devices by Age (Q2/18)

Fitness/Wellness Device Adoption and Use
  • Adoption of Connected Wellness/Fitness Devices (2013 - 2018)
  • Adoption of Wellness/Fitness Devices by Demographics (Q2/18)
  • Wrist-worn Devices Ownership (Q2/18)
  • Frequency of Using Connected Wellness/Fitness Devices (Q2/18)
  • Reason for No Longer Using Fitness Devices (Q2/18)
  • Brand of Wrist-worn Devices Owned (Q2/18)
  • Smart Watch Brand Owned (Q2/18)
  • GPS Sports Watch Brand Owned (Q2/18)
  • Fitness Tracker Brand Owned (Q2/18)
  • Weekly Use of Wrist-worn Devices by Length of Ownership (Q2/18)
  • Prior Wrist-worn Device Ownership (Q2/18)
  • Prior Wrist-worn Devices Ownership among Current Device Owners (Q2/18)
  • Wrist-worn Devices: Net Promoter Score (Q2/18)
  • Wrist-worn Devices: Net Promoter Score by Brand (Q2/18)
Connected Medical Device Adoption and Use

• Adoption of Connected Medical Devices (2013 - 2018)
• Connected Medical Device Adoption by Chronic Conditions (Q2/18)
• Adoption of Medical Devices by Demographics (Q2/18)
• Frequency of Using Connected Medical Devices (Q2/18)

Health App Use and Preferences

• Use of App Types to Manage Health and Wellness (2017 - 2018)
• Use of Wellness/Fitness/Diet App by Demographics (Q2/18)
• Use of Medical App by Demographics (Q2/18)
• Number of Apps Used to Manage Health and Wellness (2017 - 2018)
• Most Commonly Used Wellness App (2017 - 2018)
• Method of Acquiring Most Commonly Used Wellness App (2017 - 2018)
• Feature Categories of Most Commonly Used Wellness App (Q2/18)
• Top 10 Features of Most Commonly Used Wellness App (Q2/18)
• Features of Most Commonly Used Wellness App (Q2/18)
• Features of Most Commonly Used Wellness App, Contd. (Q2/18)
• Most Frequently Used Feature Categories of Wellness App (Q2/18)
• Wellness App Feature Use, 1 of 2 (Q2/18)
• Wellness App Feature Use, 2 of 2 (Q2/18)
• Top 10 Most Desired App Features (Q2/18)
• Most Desired Features of Wellness App, 1 of 2 (Q2/18)
• Most Desired Features of Wellness App, 2 of 2 (Q2/18)
• Frequency of Use of Most Commonly Used Wellness App (2017 - 2018)
• Frequency of Use of Top Wellness Apps (Q2/18)
• Wellness Apps: Net Promoter Score (Q2/18)
• Wellness Apps: Net Promoter Score by Frequency of Use (Q2/18)

Video Consultation Services: Use, Experience, and Desires

• Video Consultation With a Doctor (Q2/18)
• Video Consultation Services, by Demographic Group (Q2/18)
• Video Consultation Services (Q2/18)
• Reason for Video Consultation With a Doctor (Q2/18)
• Video Consultation With a Doctor: Medical Issues (Q2/18)
• Events After Video Consultation With a Doctor (Q2/18)
• Experience of Video Consultation With a Doctor (Q2/18)
• Important Features of Video Consultation With a Doctor (Q2/18)
• Reasons For Not Using a Video Consultation Service (Q2/18)
• Appeal of Video Consultation Services (Q2/18)

Senior Living Needs and Technology Solutions
Understanding Senior Lifestyles and Technology Use

- Demographic Profile of Senior Households (Q2/18)
- Senior Technology Profile (Q2/18)
- Recent Life Events for Seniors (Q2/18)
- Important Aspects of Retirement Life (Q2/18)
- Important Aspects of Retirement Life, by Senior Group (Q2/18)
- Concerns about Retirement Life (Q2/18)
- Housing Characteristics of Senior Households (Q2/18)
- Likely Residence at Age 80 by Age (Q2/18)
- Consideration of Housing Alternatives by Age (Q2/18)
- Use of Personal Emergency Systems or Products (2017-2018)
- Use of Specified Personal Emergency Systems or Products (2017-2018)
- Personal Emergency Response System Adoption by Age (Q2/18)
- Devices Comprising a Personal Emergency Response System, by Age (Q2/18)
- Services Comprising Personal Emergency Response System, by Age (Q2/18)

Interest in Independent Living Solutions Among Consumers Ages 50+

- Interest in Independent Living Solutions Among Seniors (Q2/18)
- High Interest in Independent Living Solutions Among Seniors Having a Smart Home Device (Q2/18)
- Must-Have Home Independent Living Feature for Themselves (Q2/18)
- Top Must-Have Home Independent Living Feature by Age (Q2/18)
- Must-Have Home Independent Living Feature by Age, Cont. (Q2/18)
- Willingness to Pay for Home Independent Living System (Q2/18)
- Willingness to Pay for Home Independent Living System, by Age (Q2/18)
- Willingness to Purchase Independent Living System for Themselves by Security and Smart Home Ownership (Q2/18)
- Preferred Sources to Purchase Independent Living Systems (Q2/18)

Caregiver Needs & Interest in Independent Living Solutions

- Caregiving Status (2017 - 2018)
- Health Condition of Cared-for Loved One by Caregivers (Q2/18)
- Residence of Cared-for Loved One (Q2/18)
- Caregiving Tasks for Cared-for Loved One (Q2/18)
- Weekly Number of Hours Spent on Caregiving (Q2/18)
- Concerns About Loved Ones (Q2/18)
- High Interest in Home Independent Living Services Among Caregivers (Q2/18)
- Must-Have Independent Living Features by Caregivers, 1 of 2 (Q2/18)
- Must-Have Independent Living Features by Caregivers, 2 of 2 (Q2/18)
- Caregivers' Willingness to Pay for Home Independent Living by Residence of Loved One (Q2/18)
- Caregivers' Most Preferred Purchase Channel (Q2/18)

Appendix