

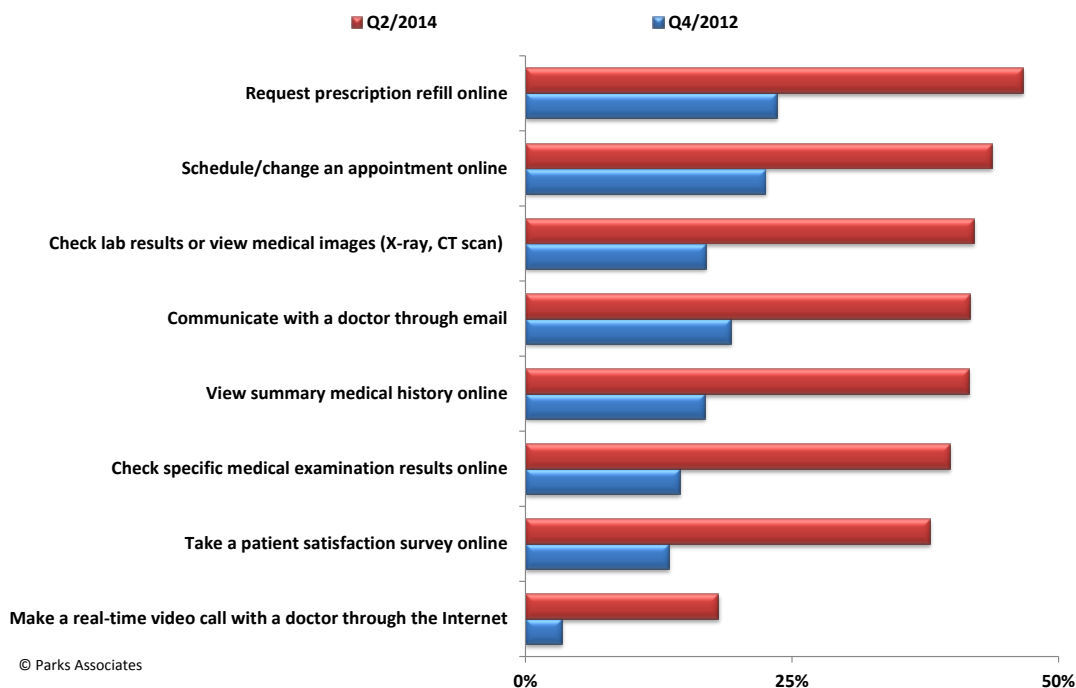
By **Harry Wang**, *Director Mobile and Health Research*; **John Barrett**, *Director, Consumer Analytics*; **Yilan Jiang**, *Manager of Consumer Research*; and **David Mitchel**, *Research Analyst, Parks Associates*

### SYNOPSIS

**360 View: Health Devices and Services for Connected Consumers** analyses the emerging market for connected health devices and online health services. It assesses current adoption levels, adoption drivers, and purchase intentions. Moreover, consumers with the most potential are identified through a segmentation based on current health conditions and health habits. Finally, the report investigates two submarkets for connected health services: caregivers and those seeking to live independently despite their health challenges.

### Online Health Communication Services Offered by Consumers' Doctors

(U.S. Broadband Households)



### ANALYST INSIGHT

“The market for connected health is distinct from the market for other ‘smart’ devices and services. Technology can make it easier for you to manage your health and fitness activities—it won’t necessarily motivate you to start exercising or eat right.”

— **John Barrett**, *Director, Consumer Analytics, Parks Associates*

### CONTENTS

#### About the Research

#### Previous Research

- [Wearable Computing: Fitness and Health in Style \(Q3/14\)](#)

CONTENTS

- Virtual Care: Technologies and Business Models (Q1/14)
- Prescribing Apps: Engaging Health Consumers (Q4/13)
- Digitally Fit: Healthy Living and Connected Devices (Q1/13)

## Key Findings

## Recommendations

## Consumer Health Profile

- Average Frequency of Participation in Wellness Activities (Q2/14)
- Average Frequency of Participation in Wellness Activities by Age (Q2/14)
- Average Frequency of Participation in Wellness Activities by Income (Q2/14)
- Health Behaviors: Alcohol, Tobacco, & Fast Food (Q2/14)
- Average Frequency of Participation in Behaviors by Age (Q2/14)
- Average Frequency of Participation in Behaviors by Income (Q2/14)
- Avg. Frequency of Participation in Health Management Activities (Q2/14)
- Participation in Health Services/Activities (Q2/14)
- Effectiveness of Health Activity/Service (Q2/14)
- Difficulty in Taking Health Actions (Q2/14)
- Reasons for Having Difficulty Routinely Exercising (Q2/14)
- Reasons for Having Difficulty Eating Right (Q2/14)
- Health Conditions (Q2/14)
- Health Conditions by Age (Q2/14)
- Health Insurance (Q2/14)
- Primary Care Doctors (Q2/14)
- Healthcare Without a Regular Doctor (Q2/14)

## Profile of Health Segments

- Health Segmentations (Q2/14)
- Exercising: Health Habits by Segment (Q2/14)
- Eating Fresh Produce: Health Habits by Segment (Q2/14)
- Avg. # of Wellness or Vice Activities by Health Segments (Q2/14)
- Avg. # of Health Management Activities by Health Segments (Q2/14)
- Age of Respondents in Health Segments (Q2/14)
- Gender of Respondents in Health Segments (Q2/14)

**CONTENTS**

- Household Income by Health Segments (Q2/14)
- Education Level of Respondents in Health Segments (Q2/14)
- Average Height by Segment and Gender (Q2/14)
- Average Weight by Segment and Gender (Q2/14)
- Participation in Health Services/Activities by Health Segment (Q2/14)
- Effectiveness of Health Activity/Service by Health Segment (Q2/14)
- Difficulty Taking Healthy Actions by Health Segments (Q2/14)
- Reasons for Having Difficulty Exercising Routinely by Health Segments (Q2/14)
- Reasons for Having Difficulty Eating Right by Health Segments (Q2/14)
- Chronic Health Problems by Health Segments (Q2/14)
- Total Number of Chronic Health Problems by Health Segments (Q2/14)
- Health Insurance by Health Segments (Q2/14)
- Having a Primary Care Doctor by Health Segments (Q4/13)

**Digital Health & Health Segments**

- Computing & Mobile Device Ownership by Health Segments (Q2/14)
- Home Entertainment Product Ownership by Health Segments (Q2/14)
- Smartphone OS by Health Segments (Q2/14)
- Use of Tablet OS by Health Segments (Q2/14)
- Connected Health Device Adoption and Purchase Intentions (Q2/14)
- Adoption of Connected Health Devices (2013 - 2014)
- Connected Health Device Adoption by Age (Q2/14)
- Connected Health Device Adoption by Education (Q2/14)
- Connected Health Device Adoption by Health Segments (Q2/14)
- Connected Health Device Purchase Intentions by Age (Q2/14)
- Connected Health Device Purchase Intentions by Education (Q2/14)
- Intention to Buy Connected Health Devices by Health Segments (Q2/14)
- Digital Pedometer/Fitness Tracker Brand Adoption (Q2/14)
- Digital Pedometer/Fitness Tracker Brand Adoption (2013 - 2014)
- Digital Pedometer/Fitness Tracker Brand Adoption by Gender (Q2/14)
- Digital Pedometer/Fitness Tracker Adoption by Health Segments (Q2/14)
- Connected Health Devices: Purchase Motivations (Q2/14)
- Connected Health Devices: Purchase Motivations, cont. (Q2/14)

**CONTENTS**

- Motivations to Buy Digital Weight Scale by Health Segments (Q2/14)
- Motivations to Buy Digital Pedometers by Health Segments (Q2/14)
- Motivations to Buy Sleep Quality Monitors by Health Segments (Q2/14)
- Motivations to Buy a Sports Watch\_by Health Segments (Q2/14)
- Motivations to Buy a Pill Box by Health Segments (Q2/14)
- Motivations to Buy a GPS Watch by Health Segments (Q2/14)
- Motivations to Buy Exercise Equipment by Health Segments (Q2/14)
- Motivations to Buy a Glucometer by Health Segments (Q2/14)
- Motivations to Buy a Blood Pressure Cuff by Health Segments (Q2/14)
- Smartphone-based Health Activities (Q2/14)
- Smartphone-based Health Activities by Health Segments (Q2/14)
- Use of Online Health Services (Q2/14)
- % of BB HHs Using Online Health Communication Services (2012 - 2014)
- Online Health Communication Services Offered by Doctors (2012 - 2014)
- Use of Online Health Communication Services (2012 - 2014)
- Non-Use of Available Digital Health Services by Health Segments (Q2/14)
- Use of Online Doctor Services by Age (Q2/14)
- Use of Online Doctor Services by Income (Q2/14)

**Consumers with Chronic Health Conditions**

- Concerns About Worsening Health Condition by Health Segments (Q2/14)
- Activities Related to Chronic Condition by Health Segments (Q2/14)
- Hospital/Urgent Care Follow-Up Expectations by Health Segments (Q2/14)
- Activities After Doctor's Visits by Health Segments (Q2/14)
- Top Three Most Helpful Health Coaching Services by Health Segments (Q2/14)
- Health Device & App Effectiveness for Managing Chronic Conditions (Q2/14)
- Challenges Related to Chronic Condition (Q2/14)
- Information Sources for Chronic Condition Self-Care by Health Segments (Q2/14)
- Comfort Engaging in Chronic Condition Self-Care Activities by Health Segment (Q2/14)
- Interest in Chronic Condition Health Coach (Q2/14)
- Top Two Reasons For Not Being Extremely Interested in a Health Coach by Health Segments (Q2/14)
- Incentives for Using a Health Coach by Health Segments (Q2/14)

## CONTENTS

**Consumers without Chronic Health Conditions**

- Health Concerns Among Those Without Chronic Conditions by Health Segment (Q2/14)
- Interest in Health Activities Among Those Without Chronic Conditions by Health Segment (Q2/14)
- Interest in Assistance With Keeping a Healthy Weight by Health Segment (Q2/14)
- Interest in Assistance With Healthy Eating by Healthy Segments (Q2/14)
- Challenges in Stress Reduction by Health Segments (Q2/14)
- Interest in Assistance With Stress Reduction by Health Segments (Q2/14)
- Challenges With Improving Sleep Quality by Health Segments (Q2/14)
- Interest in Assistance With Improving Sleep Quality by Health Segments (Q2/14)
- Interest in a Healthy Living Advisor (Q2/14)
- Reasons For Not Being Extremely Interested in a Healthy Living Advisor by Health Segments (Q2/14)
- Incentives for Using a Healthy Living Advisor by Health Segments (Q2/14)

**Caregivers**

- Current Caregiver Status (Q2/14)
- Anticipated Future Caregiver Status (Q2/14)
- Current Caregiver vs. Future Caregiver (Q2/14)
- Monthly Frequency of Activities for Current Caregivers (Q2/14)
- Caregiver Concerns (2013-2014)
- Technology Use As Caregiving Aid (Q2/14)
- Technology Use As Caregiving Aid by Children at Home (Q2/14)
- Appeal of Technology Use as Caregiving Aid (2013 - 2014)
- Appeal of Technology Use As Caregiving Aid by Age (Q2/14)

**Independent Living**

- Senior Health & Mobility Status (Q2/14)
- Senior Health & Safety Concerns (Q2/14)
- Appeal & Use of Independent Living Solutions (Q2/14)

**Choosing a Healthcare Provider**

- Methods for Selecting Care Providers (Q2/14)
- Methods for Selecting Care Providers by Age (Q2/14)
- Important Factors for Selecting Care Providers (Q2/14)



# Health Devices and Services for Connected Consumers

360 VIEW

SERVICE: **DIGITAL HEALTH**

2Q 2014

## CONTENTS

- Important Factors for Selecting Care Providers by Age (Q2/14)

## Additional Research from Parks Associates

## ATTRIBUTES

Parks Associates  
15950 N. Dallas Pkwy  
Suite 575  
Dallas TX 75248

TOLL FREE 800.727.5711

PHONE 972.490.1113

FAX 972.490.1133

[parksassociates.com](http://parksassociates.com)

[sales@parksassociates.com](mailto:sales@parksassociates.com)

Authored by Harry Wang, John Barrett, Yilan Jiang, and David Mitchel  
Executive Editor: Tricia Parks

Number of Slides: 145  
Published by Parks Associates

© 2014 Parks Associates | Dallas, Texas 75248

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

### Disclaimer

*Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.*