The New Role of Consumer Tech in Health and Wellness
Objectives

• Understand consumer attitudes regarding the role of technology in health and wellness
• Determine consumer attitudes and perceptions surrounding health information data and metrics
• Assess the role and potential role of software applications in consumer health and wellness
• Determine interest in leveraging new technologies for health purposes
Consumer Health Segments

Least Health Concerned
- 15%
- 31% Do not exercise
- 34% Own a smartphone or tablet
- 14% Have used a health tech device

Moderately Health Concerned
- 64%
- 49% Exercise 1+ times/wk
- 25% Have used a health tech device

Highest Health Concerned
- 21%
- 28% Exercise 3+ times/wk
- 40% Own a smartphone or tablet
- 40% Have used a health technology device
Use of Health Technology Devices Past 12 Months

Overall Incidence 26%

Top Mentions of Products Used
1. Blood pressure monitors
2. Blood glucose meters
3. Pedometers

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## Sources of Health Tech Information

<table>
<thead>
<tr>
<th>Source</th>
<th>Users</th>
<th>Non-Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctor/health professional</td>
<td>51%</td>
<td>20%</td>
</tr>
<tr>
<td>Friends/family members/co-workers</td>
<td>32%</td>
<td>19%</td>
</tr>
<tr>
<td>TV Commercials</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>Health related websites</td>
<td>27%</td>
<td>14%</td>
</tr>
<tr>
<td>Newspaper/magazine articles</td>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>Online news sites</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>Health publications</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Health associations</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>Newspaper/magazine advertisements</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>Retail store displays</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Social media sites</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>Internet advertisements</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Health related blogs</td>
<td>10%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Interest in Health Technology Devices

- Scales recording weight loss/gain over time: 44%
- Meters/gauges measuring vital signs: 40%
- Meters recording progress through a fitness/workout plan: 37%
- Devices and services analyzing food nutritional content: 35%
- Devices tracking/recording sleep patterns: 31%
- Prescription reminders: 24%
- Doctor/healthcare provider video communication devices: 24%
Interest by Health Concern

**Connected Body Scales**
- Obesity: 56%

**Diagnostic Meters**
- HBP: 53%
  - Sleep Difficulties: 47%

**Sleep Monitors**
- Sleep Difficulties: 45%

**Fitness Monitors**
- Obesity: 45%
- Home Care: 44%

**Prescription Reminders**
- Home Care: 38%

**Home Communication/Monitoring**
- Home Care: 33%

Base: U.S. Online Adults who personally have the condition or someone in the family has the condition (n = 1,679)

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Concerns Related to Health Tech

- Cost of the device or service: Highest (68%), Moderate (52%), Lowest (61%)
- Concerns regarding the security of your data: Highest (51%), Moderate (44%), Lowest (30%)
- Complexity of the device or service: Highest (37%), Moderate (24%), Lowest (15%)
- Doubts about its ability to improve your health: Highest (27%), Moderate (26%), Lowest (24%)
- It won’t be used regularly: Highest (25%), Moderate (19%), Lowest (20%)
- Lack of interest: Highest (20%), Moderate (18%), Lowest (14%)
- Prefer other methods to monitor health: Highest (14%), Moderate (7%), Lowest (6%)
Reasons For Not Using Health Technologies

“I never had a need to use a device. I'm fairly young and my health is pretty good.”

• Health Technology Device Non-User, male, 18-20

“I've found that I can keep track of things like that with pen and paper.”

• Health Technology Device Non-User, female, 21-24
<table>
<thead>
<tr>
<th>Data Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blood pressure</td>
<td>48%</td>
</tr>
<tr>
<td>Weight loss/gain</td>
<td>42%</td>
</tr>
<tr>
<td>Heart rate</td>
<td>41%</td>
</tr>
<tr>
<td>Cholesterol levels</td>
<td>38%</td>
</tr>
<tr>
<td>Sleep patterns</td>
<td>36%</td>
</tr>
<tr>
<td>Fitness/exercise performance</td>
<td>34%</td>
</tr>
<tr>
<td>Daily diet/nutrition levels</td>
<td>32%</td>
</tr>
<tr>
<td>Blood glucose levels</td>
<td>32%</td>
</tr>
<tr>
<td>Seasonal allergies</td>
<td>30%</td>
</tr>
<tr>
<td>Food allergies</td>
<td>22%</td>
</tr>
<tr>
<td>Injury rehabilitation progress</td>
<td>18%</td>
</tr>
</tbody>
</table>
Willingness to Share Anonymous Data

% More Likely to Share if Data Were Anonymous

Doctor: 51%
Healthcare provider/Insurer: 44%
Device manufacturer: 39%
App/software developer: 33%
Governmental agencies: 30%
Interest in New Technologies and Services

- Transmit data on your health to your doctor via a wireless device: 36% Interested, 30% Neutral, 34% Not interested
- Store and access your health records online: 33% Interested, 29% Neutral, 38% Not interested
- Consult a doctor from your home remotely via video: 32% Interested, 31% Neutral, 37% Not interested
- Share health information online with others with the same health concerns: 24% Interested, 34% Neutral, 42% Not interested
- Share health information on a social network: 13% Interested, 21% Neutral, 66% Not interested
Health Apps Owned

- Calorie Counter/Diet tracker: 51%
- Fitness App/Exercise tracker: 36%
- Customized music playlist: 32%
- Information/Reference: 25%
- Pedometer: 20%
- PHR: 18%
- Heart rate monitor: 15%
- Health games: 9%
- Sleep monitor: 9%
- Blood pressure monitor: 9%
- Blood glucose meter: 6%
Perspectives on Health Apps

“Apps are convenient for technology savvy people. I am not one of them...I like the old fashion way of doctors’ visits and controlling my health prevention myself.”

Health Application User, female, 60-64

“Physical fitness apps would be great to use, but for the other (uses) I don't really see the need unless my doctor asked me to”

Health Mobile Application Non-User, female, 25-29
Key Findings

• Raise the Profile
  – With trusted sources (doctors, healthcare providers)

• Standard rules of CE marketing don’t necessarily apply
  – The health technology consumer is a different tech user

• Ease concerns about privacy
Colleen Lerro

clerro@CE.org

703.907.7080

@ColleenLerro