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# The New Role of Consumer Tech in Health and Wellness





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# 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

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# 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

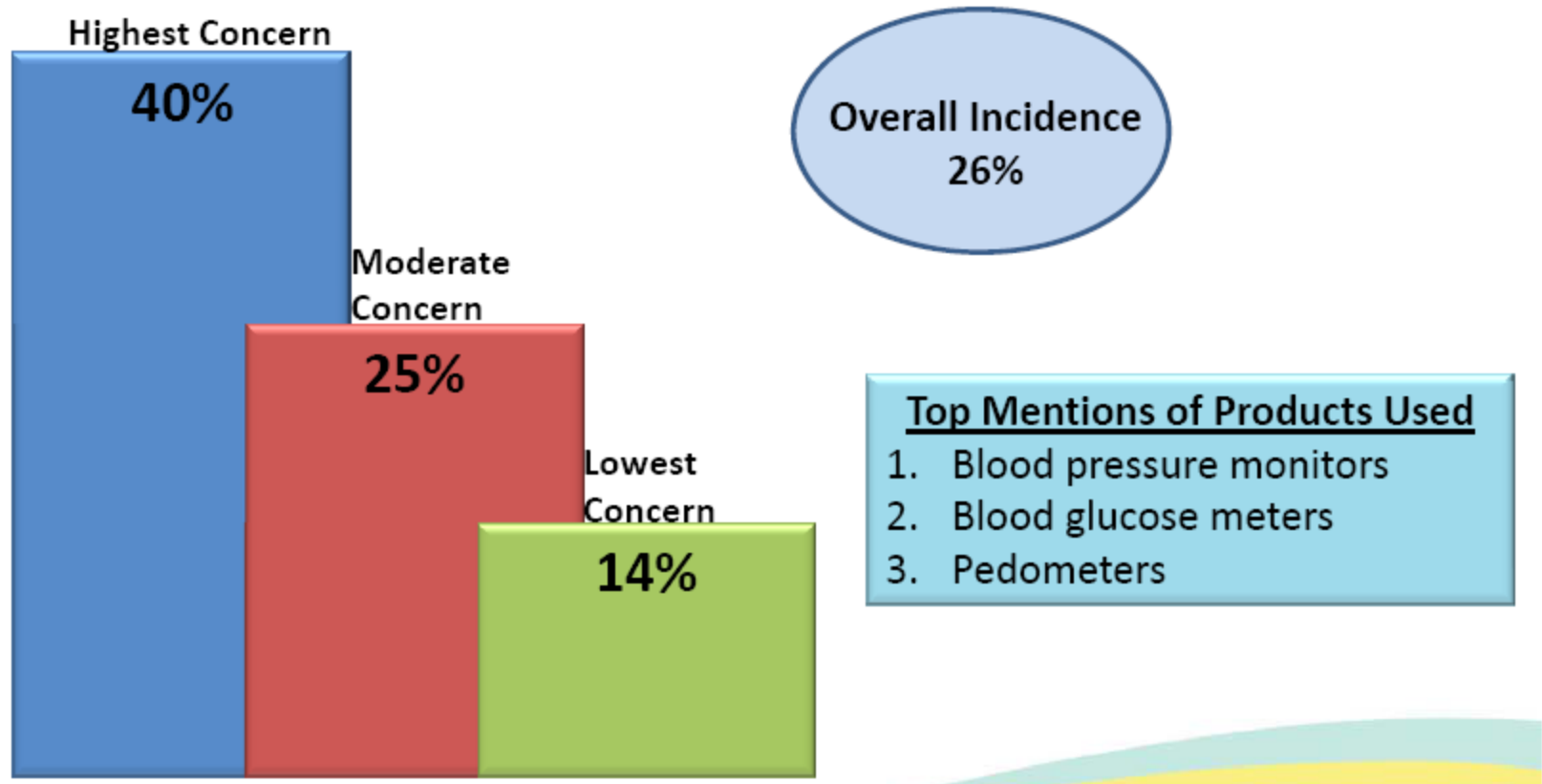
Highest Health Concerned

21%

- 28% Exercise 3+ times/wk
- 40% Own a smartphone or tablet
- 40% Have used a health technology device



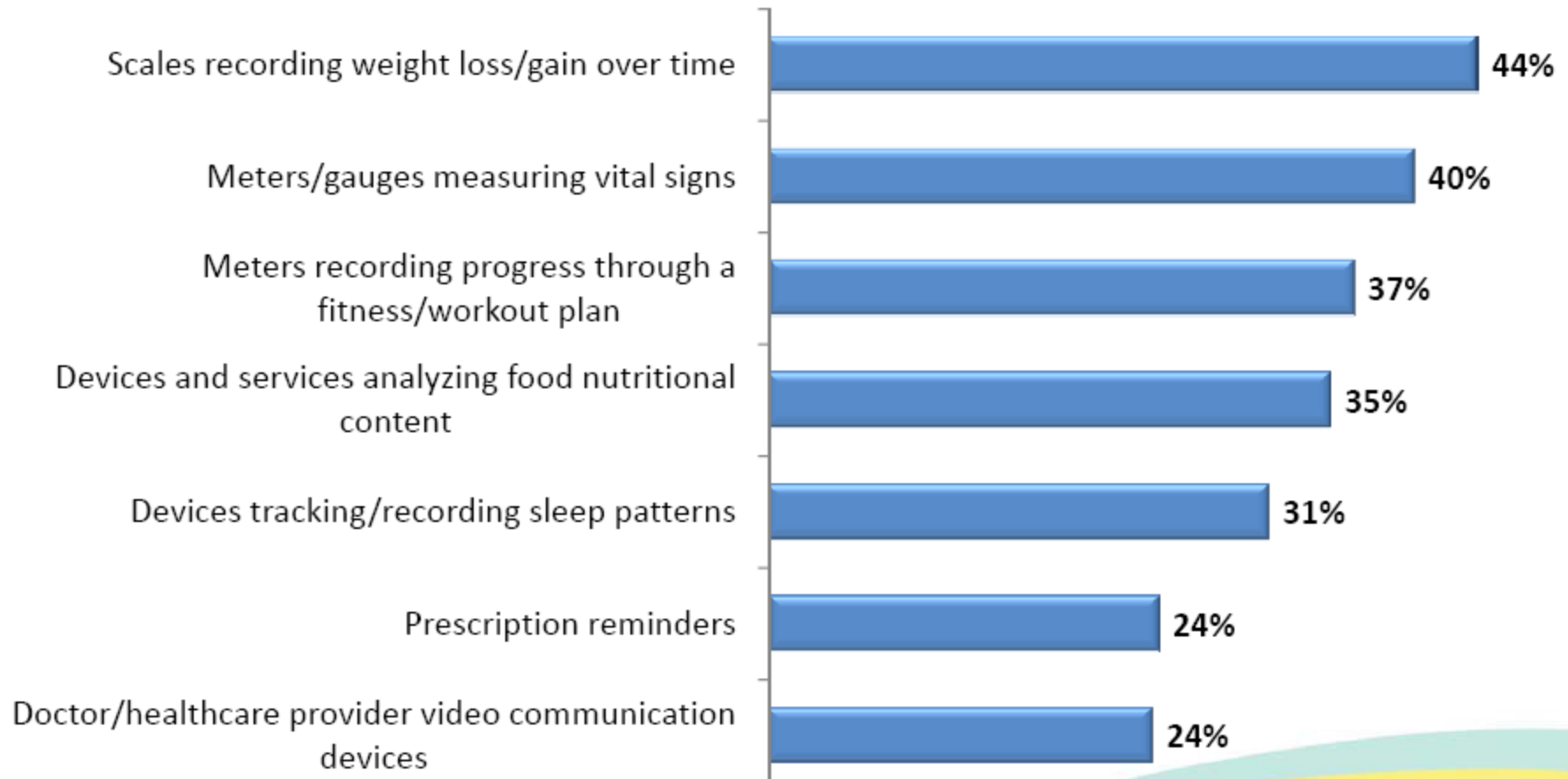
# Use of Health Technology Devices Past 12 Months



# Sources of Health Tech Information

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

# Interest in Health Technology Devices





# 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%

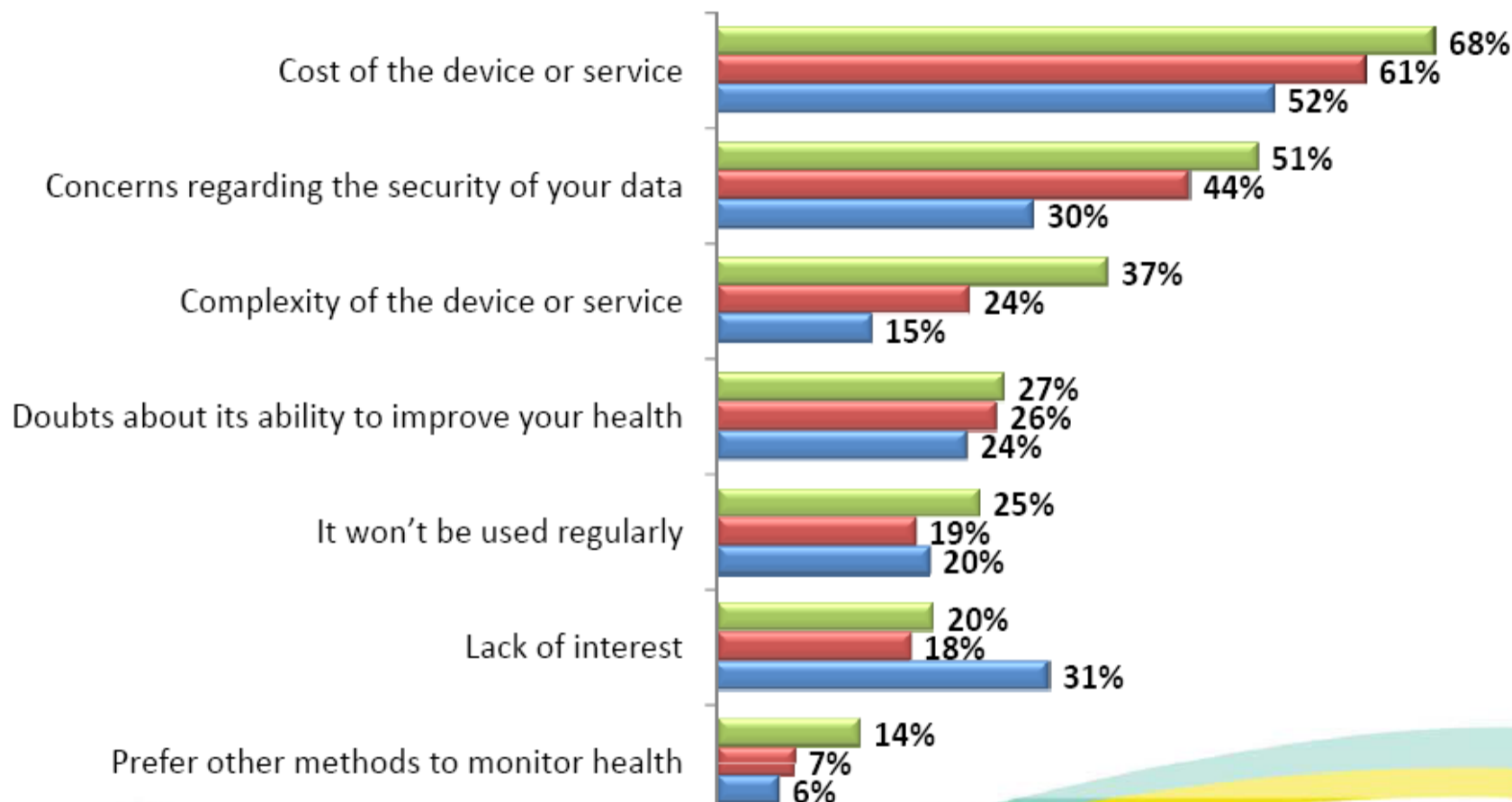
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Base: U.S. Online Adults who personally have the condition or someone in the family has the condition (n = 1,679)

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# Concerns Related to Health Tech

■ Highest ■ Moderate ■ Lowest



# 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

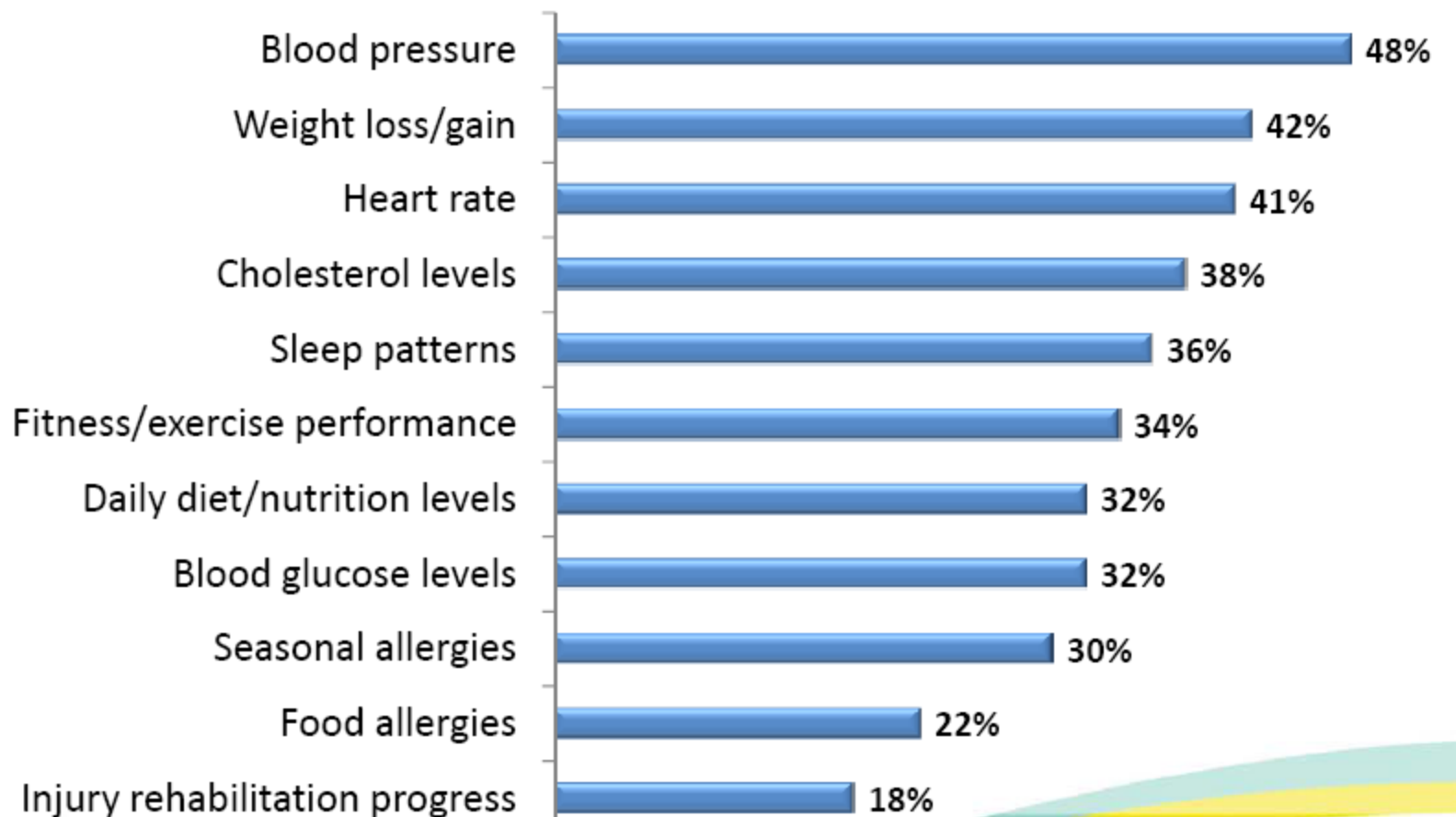


"I've found that I can keep track of things like that with pen and paper."

•Health Technology Device Non-User, female, 21-24



# Data Most Willing to Share



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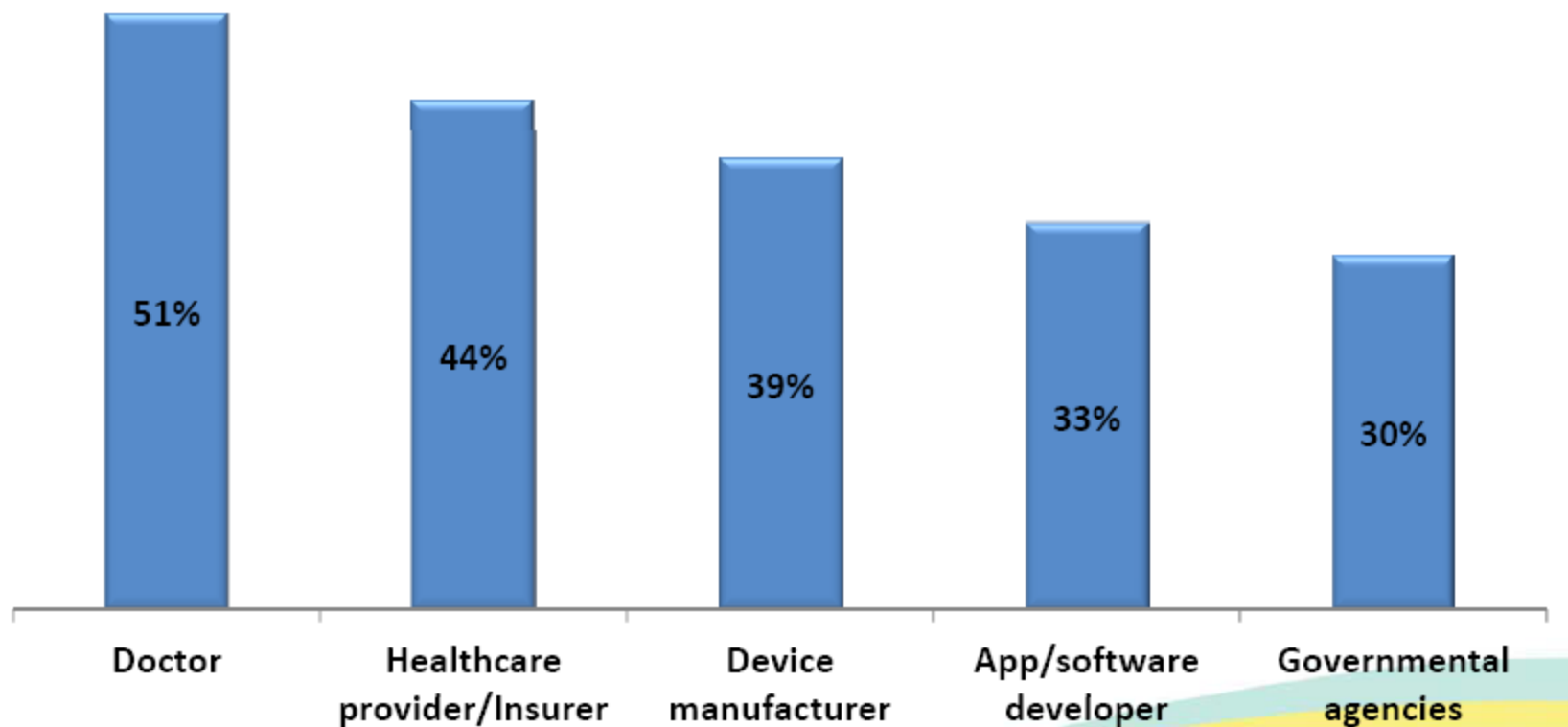
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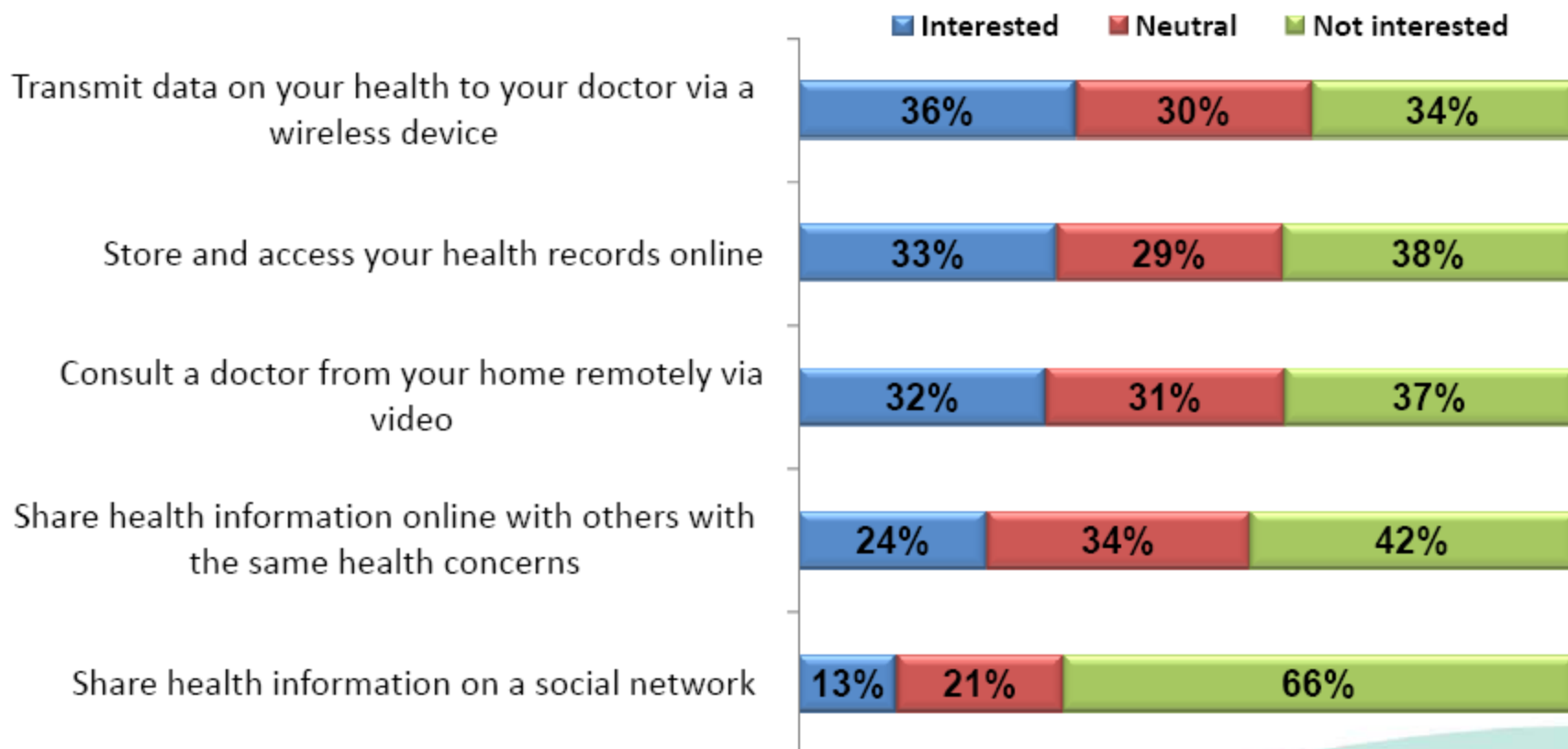
# Willingness to Share Anonymous Data

% More Likely to Share if Data Were Anonymous





# Interest in New Technologies and Services



# 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

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