

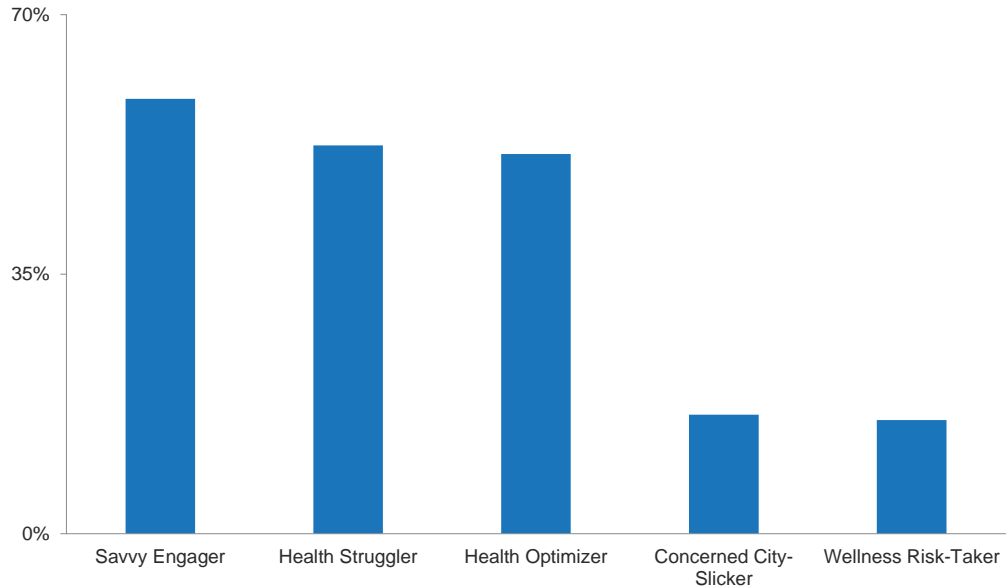
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SYNOPSIS

Because of the health reforms and payment model changes, the healthcare industry is incentivized to engage their patients outside of traditional healthcare settings. This 360 View Update analyzes consumer attitudes and preferences about making care choices and decisions and provides guidance to healthcare stakeholders regarding how to communicate and engage with consumers for self-care and support. This research also introduces Parks Associates' 14 digital health consumer segments and compares their differences in attitudes and needs.

Top Five Segments: Highest Percentages with Consumers very Interested in Using Health/Wellness Coaches

U.S. Broadband Households in Specified Health Segments



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ANALYST INSIGHT

“When dealing with health choices, consumers are not a homogenous group. Personal experience, attitude towards preventive care, emotional attachment to care services, and perceived usefulness of various support tools all help define who they are and what engagement approach from care providers clicks with them. Care providers will benefit from treating consumers as a unique individual and being the guide at the right time and with the right tools to support consumers to take the right actions for their health.”

— **Harry Wang**, *Director, Health & Mobile Product Research*, **Parks Associates**

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About the Research

Previous Research

- 360 View: Empowering Healthcare Consumers (Q4/15)
- Wearables for Health: Innovations & Disruptions (Q3/15)

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- Patient Portal: Engaging Consumers (Q2/15)
- Smart Home Platforms for Health (Q2/15)
- Digitally Fit: Products and Services for Connected Consumers (Q1/15)
- Delivering Quality Healthcare to the Digital Home: The 2014 Edition (Q4/14)

Key Findings**Industry Insight****Recommendations****Trends in Connected Healthcare Device Ownership:**

- Adoption of Connected Healthcare Devices (2013 - 2015)
- Number of Connected Healthcare Devices Owned (2013 - 2015)
- % of U.S. Broadband Households Using At Least One Connected Healthcare Device by Age (2013 - 2015)

Consumer Attitudes Towards Self-Care and Overall Attitudes Towards Care Tasks:

- Comfort with Completing Health Activities (Q3/15)
- Comfort with Self Care Activities, for those with Chronic Conditions (2014 - 2015)
- Comfort with Self Care Activities, by Chronic Conditions (Q3/15)
- Comfort in Self Care by Number of Chronic Conditions (Q3/15)
- Comfort in Self Care by Connected Healthcare Device Ownership (Q3/15)
- Potential Tools That Create More Comfort in Selecting a Health Monitoring Device (Q3/15)
- Potential Tools That Help Create Understanding of Health Insurance Benefits (Q3/15)
- Information That Creates More Comfort in Selecting a Care Provider or Facility (Q3/15)
- Interest in Using Health/Wellness Coaches (Q3/15)

Consumer Attitudes Towards Health Management & Well Being by Segment:

- Health Management Attitudes by Health Group (Q3/15)
- Healthy & Engaged: Health Management Attitudes by Segment (Q3/15)
- Young & Indifferent: Health Management Attitudes by Segment (Q3/15)
- Challenged but Mindful: Health Management Attitudes by Health Segment (Q3/15)
- Unhealthy & In Denial: Health Management Attitudes by Health Segment (Q3/15)

Consumer Comfort Level with Self-Care Activities:

- Comfort with Health Management and Administrative Activities by Health Groups (Q3/15)
- Healthy & Engaged: Comfort with Health Management Activities by Segment (Q3/15)

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- Young & Indifferent: Comfort with Health Management Activities by Segment (Q3/15)
- Challenged but Mindful: Comfort with Health Management Activities by Segment (Q3/15)
- Unhealthy & In-Denial: Comfort with Health Management Activities by Segment (Q3/15)

Tools & Support Needed for Selecting Health Monitoring Devices:

- Potential Tools That Create More Comfort Selecting a Health Monitoring Device by Group (Q3/15)
- Healthy & Engaged: Potential Tools That Create More Comfort Selecting a Health Monitoring Device by Segment (Q3/15)
- Young & Indifferent: Potential Tools That Create More Comfort Selecting a Health Monitoring Device by Segment (Q3/15)
- Challenged but Mindful: Potential Tools That Create More Comfort Selecting a Health Monitoring Device by Segment (Q3/15)
- Unhealthy and In-Denial Potential Tools That Create More Comfort Selecting a Health Monitoring Device by Segment (Q3/15)

Tools & Support Needed for Understanding Health Insurance Benefits:

- Potential Tools That Support Understanding of Health Insurance Benefits by Group (Q3/15)
- Healthy & Engaged: Potential Tools That Support Understanding of Health Insurance Benefits by Segment (Q3/15)
- Young & Indifferent: Potential Tools That Support Understanding of Health Insurance Benefits by Segment (Q3/15)
- Challenged but Mindful: Potential Tools That Support Understanding of Health Insurance Benefits by Segment (Q3/15)
- Unhealthy & In-Denial: Potential Tools That Support Understanding of Health Insurance Benefits by Segment (Q3/15)

Tools & Support Needed for Selecting a Care Provider/Facility:

- Potential Information That Helps Increase Comfort in Selecting a Care Provider/Facility by Group (Q3/15)
- Healthy & Engaged: Potential Information That Helps Increase Comfort in Selecting a Care Provider/Facility by Segment (Q3/15)
- Young & Indifferent: Potential Information That Helps Increase Comfort in Selecting a Care Provider/Facility by Segment (Q3/15)
- Challenged but Mindful: Potential Support That Helps Increase Comfort in Selecting a Care Provider/Facility by Health Segment (Q3/15)
- Unhealthy & In Denial: Potential Support That Helps Increase Comfort in Selecting a Care Provider/Facility by Health Segment (Q3/15)

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Interest in Health and Wellness Coaches:

- Interest in Using Health/Wellness Coaches by Group (Q3/15)
- Interest in Using Health/Wellness Coaches by Segment (Q3/15)

Additional Research from Parks Associates

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