

# **Prescribing Apps: Engaging Health Consumers**

**MARKET FOCUS** 

SERVICE: DIGITAL HEALTH

4Q 2013

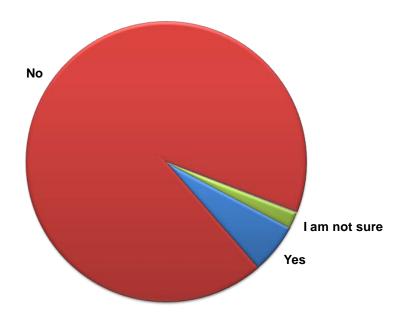
By John Barrett, Director, Consumer Analytics, and Yilan Jiang, Manager of Consumer Research, Parks Associates

### **SYNOPSIS**

Prescribing Apps: Engaging Health Consumers analyzes consumer use of health apps personally recommended by healthcare professionals. It quantifies and profiles the consumers using such apps and gauges the extent to which they feel the apps improved their personal health. It assesses the demand for such apps among non-users and the channels through which they are inclined to obtain such apps.

# **Mobile Health App Recommended by Doctor**

(U.S. Broadband Households)



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# **ANALYST INSIGHT**

"The app market in general generates substantial revenues, and there are strong prospects for generating revenue from health apps. Consumers are receptive to the health-app concept—getting doctors onboard will be key to their success."

— John Barrett, Director, Consumer Analytics, Parks Associates

#### **CONTENTS**

**About the Research** 

**Previous Research** 

**Key Findings** 

Recommendations

## **App Adoption**

- Mobile Device Adoption (2009-2013)
- Smartphone and Tablet Ownership (Q3/13)





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- Percentage of Broadband Households Connecting CE Devices to TV and the Internet (2010-2013)
- · Smart TV App Distribution Sources
- · Connected Game Console App Distribution Sources
- Mobile App Usage by Smartphone OS (Q3/12)
- · Mobile/Tablet App usage by Household Income/Children at Home (Q3/12)

#### **Overview of App Revenue Models**

- App Revenue Models: App Sales
- App Purchases (Q1/13)
- · Free Apps Used by Smartphone OS (Q3/12)
- Free App Usage And Monthly Spending on Mobile Apps (Q3/12)
- · App Revenue Models: In-App Purchases
- · In-App Purchases on Smartphones/Tablets (Q3/12)
- · Average Monthly Smartphone In-App Purchases by Generation (Q3/12)
- Average Monthly Tablet In-app Purchases by Generation (Q3/12)
- App Revenue Models: In-App Advertising
- Connected Device Ad Recall and Response Rate (Q3/12)
- · App Revenue Models: Indirect Revenues
- Types of Mobile Purchases (Q1/13)

#### Mobile Apps Recommended by A Doctor

- Mobile Health app Recommended by Doctor (Q3/13)
- · Doctor Recommended Mobile Health App by Smartphone OS (Q3/13)
- Mobile Health app Recommended by Doctor by Age (Q3/13)
- Mobile Health App Recommended by Doctor by Income (Q3/13)
- Use of Mobile Health App (Q3/13)
- Use of Mobile Health App by Smartphone OS (Q3/13)
- · Positive Impact of Mobile Health App on Health Improvement (Q3/13)
- · Positive Impact of Mobile Health App on Health Improvement (Q3/13)
- Use of Mobile Health App by Improved Health (Q3/13)
- Doctor Followed-Up About App usage (Q3/13)
- Doctor Followed-Up About app Usage (Q3/13)
- Doctor Follow-Up About App usage by Health Improvement (Q3/13)





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Use of Mobile Health app & Doctor Follow-Up (Q3/13)

### Receptiveness to apps Recommended by A Doctor

- · Likelihood Of Using Doctor-Recommended Mobile Health App (Q3/13)
- Likelihood Of Using Mobile Health app If Doctor Recommends by Smartphone OS (Q3/13)
- · Likelihood Of Using Doctor-Recommended Mobile Health App by Age (Q3/13)
- · Likelihood Of Using Mobile Health App If Doctor Recommends by Income (Q3/13)
- · Likelihood Of Using Doctor-Recommended Mobile Health App by Minors in Home (Q3/13)

### **App Stores**

- Smartphone App Discovery Methods (Q3/12)
- · Sources to Download Mobile Health App (Q3/13)
- First Choice to Download Mobile Health App by Smartphone OS (Q3/13)
- Top Source to Download Mobile Health app by Age (Q3/13)

#### **Additional Research from Parks Associates**

#### **ATTRIBUTES**

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