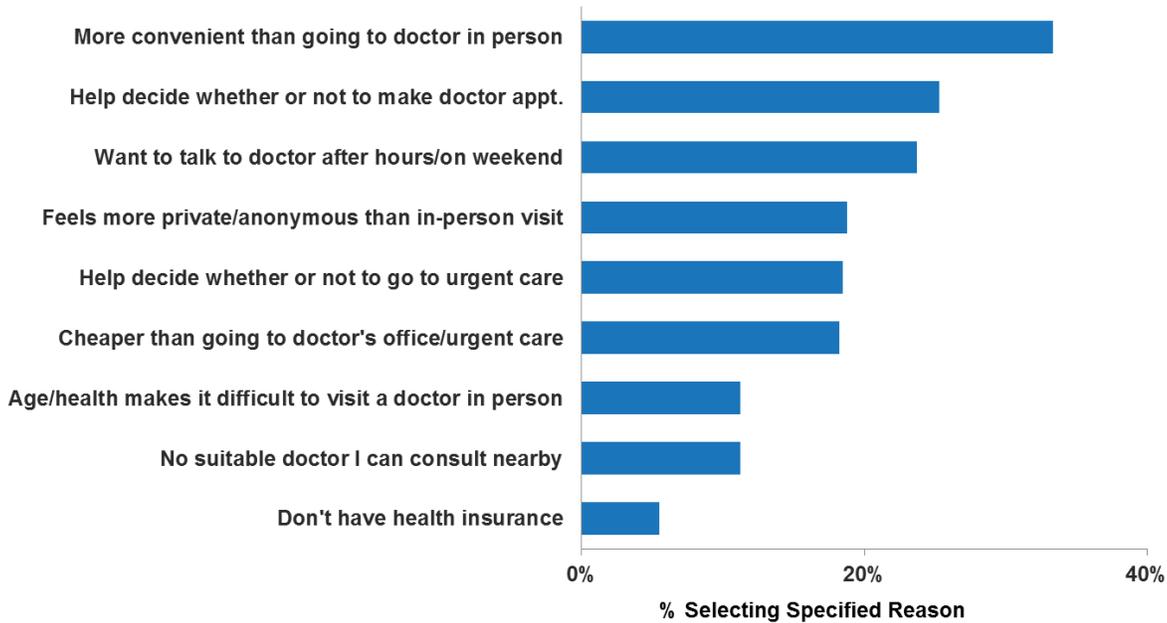


Reasons For Using Telehealth Services

US Broadband Households that Used Telehealth Service in Last 12 Months



© Parks Associates

Consumer Analytics Team



Yilan Jiang, Director



Pooja Kamble, Researcher



Xiaofan Tan, Intern

Industry Analyst



Jennifer Kent, Senior Director

SYNOPSIS

This study examines the growing market of connected medical devices and investigates consumers' appetite for greater insight into their own wellbeing and solutions that enable them to better manage their health conditions. It assesses opportunities at the juncture of healthcare and home, including virtual visit services and remote patient monitoring programs.

ANALYST INSIGHT

"More than one-third of US heads of broadband households ages 65 and older are interested in telehealth services, although the majority of them have never used these services. Of seniors who have never used telehealth services, 44% believe an in-person appointment would provide better diagnosis and treatment, so to be successful, these solutions need to focus on that personal connection to ensure patients are comfortable with these innovations."

— Jennifer Kent, *Senior Director*, Parks Associates

Number of Slides: 61

CONTENTS

Consumer Analytics: Wellness and Independent Living Track

Key Questions Answered

Survey Methodology

Defining Heads of Broadband Households

Connected Health Device Definitions

Interpreting Likert Scales

Reading Parks Associates Charts

Executive Summary

- Industry Insight
- Key Findings and Market Impact

Consumer Adoption and Use of Connected Medical Devices

- Connected Medical Device Adoption (Q2/19)
- Household Adoption of Connected Fitness/Wellness Equipment (Q2/19)
- Connected Medical Device Adoption (2013 - 2019)
- Connected Medical Devices Online or at Retail Store (Q2/19)
- Method of Obtaining Connected Medical Devices (Q2/19)
- Connectivity Method of Connected Medical Devices (Q2/19)
- Value of Connectivity for Medical Devices (Q2/19)
- Important Purchase Factors for Connected Health and Fitness Devices (Q2/19)
- Most Useful Health Metrics for Connected Health and Fitness Devices (Q2/19)
- Adoption of Connected Medical Devices by Demographics (Q2/19)

- Appeal of Connected Health Device Monitoring (Q2/19)
- Appeal of Connected Health Device Monitoring by Demographics (Q2/19)
- Appeal of Connected Health Device Monitoring by Health Conditions (Q2/19)
- Appeal of Connected Health Device Interaction with Other Connected Devices in Home (Q2/19)
- Appeal of Connected Health Use Cases for the Smart Home Among Smart Home Devices Owners and Security System Owners (Q2/19)

Patient Portals and Self-Diagnostic Apps

- Use of Health Management Tools (Q2/19)
- Use of Self-diagnosis App (Q2/19)
- Consumer Perception of Self-Diagnosis App (Q2/19)

Telehealth Service Use and Preferences

- Use of Telehealth Service (2017 - 2019)
- Types of Telehealth Service Used (Q2/19)
- Use of Telehealth Service by Demographic Group (Q2/19)
- Health Insurance Among Telehealth Service Users (Q2/19)
- Telehealth Services Used (Q2/19)
- Reasons for Using Telehealth Services (Q2/19)
- Medical Issues Consulted Using Telehealth Services (Q2/19)
- Actions After Telehealth Services (Q2/19)
- User Attitudes Towards Telehealth Services (Q2/19)

Telehealth Channel and Feature Preferences

- Appeal of Telehealth Approaches (Q2/19)

- Appeal of Telehealth Services (2018-2019)
- Appeal of Sharing Health Device Data with Telehealth Service (2018-2019)
- Appeal of Telehealth Services by Service Usage (Q2/19)
- Importance of Factors in Telehealth Services (Q2/19)

Barriers to Telehealth Service Use

- Reasons for Not Using Telehealth Services (Q2/19)
- In-Person Bias Barrier to Telehealth Services by Demographics (Q2/19)
- Awareness as Barrier to Telehealth Services by Demographics (Q2/19)
- Cost as Barrier to Telehealth Services by Demographics (Q2/19)

Appendix

ATTRIBUTES

Parks Associates

5080 Spectrum Drive
Suite 1000W
Addison TX 75001

parksassociates.com

sales@parksassociates.com

PHONE 972.490.1113

Toll free 800.727.5711

FAX 972.490.1133

Authored by Kristen Hanich, Yilan Jiang, and Pooja Kamble
Executive Editor: Jennifer Kent

Published by Parks Associates

© 2019 Parks Associates | Addison, Texas 75001

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.