



# DIGITAL HEALTH CONSUMER ADOPTION

**ROCK**  
HEAL+H

*October 19, 2015*

## 2015

*Results from our landmark  
national survey*

## DIGITAL HEALTH CONSUMER ADOPTION

October 19, 2015

Historically, the consumer space in digital health has been one of the most challenging categories for investors, including Rock Health. The failure to discover and build massive companies has led to fear, anchored to widely-held perceptions of the consumer relationship to healthcare. In search of real data around the space, we surveyed thousands of individuals (representing the entire U.S. adult population). Our goal was to answer a few key questions: 1) What are the current rates of penetration for the major B2C digital health categories? 2) What are the primary demographic and attitudinal drivers of adoption? 3) What are individual's attitudes towards data privacy and who do consumers trust in terms of sharing health data? This report presents the data from our most recent survey, run over the summer and including over 4,000 individuals.

The results may surprise you. Often-heard digital health memes, including that the only users in these categories are young, educated, rich, and healthy turn out to be false. Instead, our study found that an individual's attitude towards healthcare (responsibility, self-management, and willingness to pay out-of-pocket) was a major indicator of adoption. We found the unhealthy are adopting faster than the healthy. And finally we found that digital health adoption closely mirrors general technology adoption (an unassailable trend across all demographics). However, given that penetration is still low across many of the surveyed categories, we fully expect demographic gaps to open up, particularly around age and income.

The need for consumer engagement in healthcare has never been higher. And yet, nearly half of Americans have used only one or none of the major digital health categories. No iconic company exists in the consumer category, perhaps representing one of the largest opportunities in digital health. We're excited to add some data to the conversation.

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**Rock Health** is powering the future of the digital health ecosystem, bringing together the brightest minds across disciplines to build better solutions. Rock Health funds and supports startups building the next generation of technologies transforming healthcare.

Our partners include AARP, Abbott, Blue Shield of California, Boehringer Ingelheim, Brigham and Women's, CVS Health, Deloitte, Genentech, Kaiser Permanente, Qualcomm Life, and UCSF.

Please visit [rockhealth.com](http://rockhealth.com) to learn more.

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# OVERVIEW

*Survey objectives  
and background*

# The Rock Health Digital Health Consumer Survey tested adoption of technologies and attitudes towards data privacy and sharing within the healthcare ecosystem.

## SURVEY DESIGN

Rock Health conceived and wrote all questions and materials used in the survey

The denominator for this survey is internet-connected U.S. adults; when stating adoption metrics as a percentage of the population, the report is referring only to internet-connected adults

The survey was designed to be <15 minutes in length with three main sections: **demographics, attitudes and preferences, and adoption trends**

The maximum number of questions a respondent could have answered was 101 questions; question formats ranged from multiple choice to Likert Scales to open responses

## DIGITAL HEALTH ADOPTION

Adoption levels, recency of usage, and actionability for **online health information** across type of information

Adoption levels, recency of usage, plans to use, actionability, and the most helpful characteristics of **online reviews for healthcare services**

Adoption levels and mediums of **tracking health factors**

Adoption levels, recency of purchase, plans to purchase, and reasoning for purchase of **wearable devices**

Adoption levels, recency of usage, plans to use, and satisfaction rates for **genetic-based services**

Adoption levels, recency of usage, plans to use, and satisfaction rates for **telemedicine services**

## ATTITUDES AND PREFERENCES

Comfort with data privacy scenarios (i.e., sharing health data in specific use cases)

Willingness to share health data with industry stakeholders for a range of health data types

Level of trust and perceived alignment across stakeholders by rank

## DEMOGRAPHICS

Basic demographic questions (e.g., age, income, education, household size, gender, race, employment, and zipcode)

Health status (e.g., insurance coverage, self-reported state of health, # of prescription drugs, # of hospitalizations, # of chronic diseases, and # of doctor visits)

Technology adoption (e.g., smartphone user, active app user, social media user)

# ADOPTION

*Six digital health  
categories*

# The focus of our survey was to test the current adoption of six core digital health categories that operate within B2C market contexts.

## CONSUMER ADOPTION

*Percent adoption by digital health category*

There are a number of digital health companies (established and otherwise) redefining the way consumers interact with the healthcare system. These companies are establishing direct to consumer business models and fall into six overarching categories.

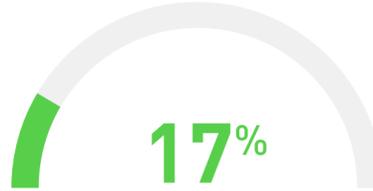
Consumers have historically been one-step removed from the healthcare industry. While consumers are usually not responsible for making key decisions or paying for healthcare expenses out of pocket, health remains innate to each individual.



**71%**  
**ONLINE HEALTH INFORMATION**  
*Historical use of online or mobile resources to search for specific health topics*



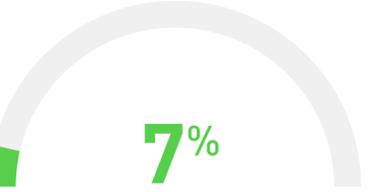
**50%**  
**ONLINE HEALTH REVIEWS**  
*Historical use of online or mobile resources to find reviews of doctors or healthcare services*



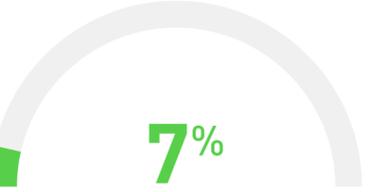
**17%**  
**MOBILE HEALTH TRACKING**  
*Current use of a mobile health application to track one or more health-related factors*



**12%**  
**WEARABLES**  
*Ownership of wearable devices that help track key health-related factors*



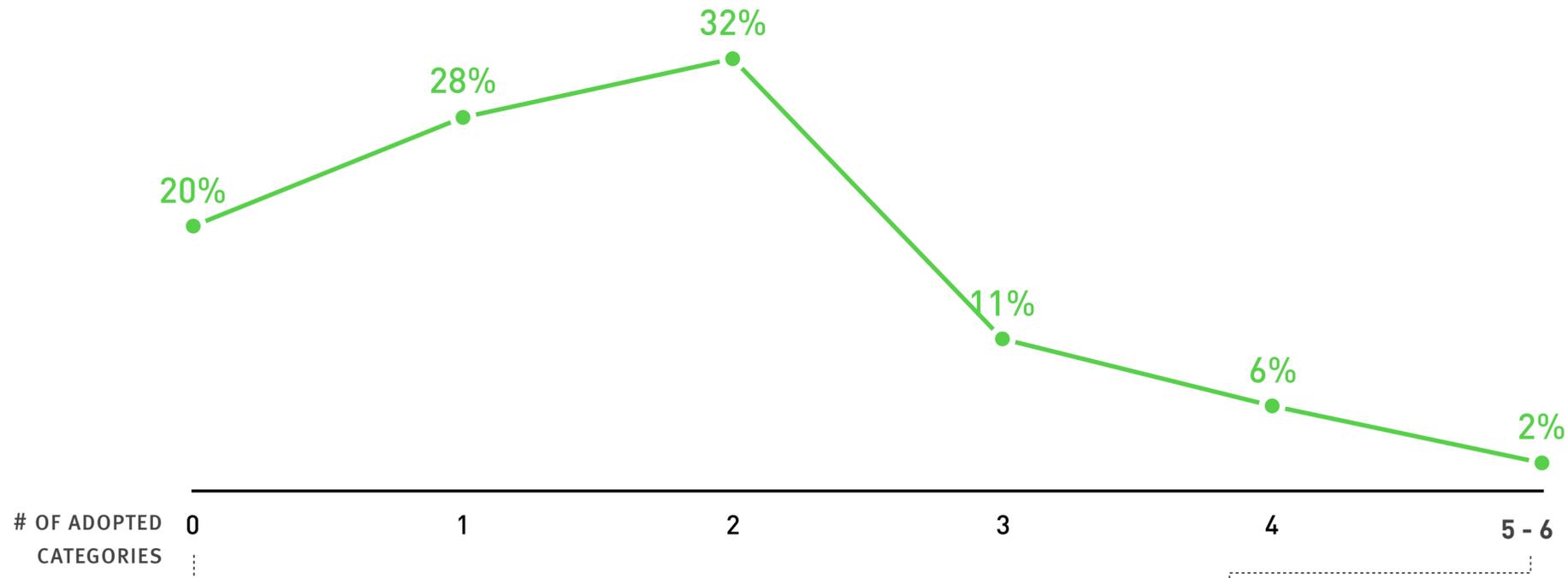
**7%**  
**GENETIC SERVICES**  
*Consumer-driven historical use of genetic-based services including family planning and personal DNA*



**7%**  
**TELEMEDICINE**  
*Historical use of video-based technologies to receive medical care or advice from a healthcare professional*



# Digital health still faces a steep adoption climb, with nearly half of consumers having used only one digital health technology or having not adopted any at all.



NON-ADOPTER		SUPER ADOPTER	
37%	% age 55+	27%	
48%	% high income	49%	
70%	% "healthy"	48%	
52%	% own smartphone	99%	
15%	% rural	21%	

## STATE OF CONSUMER ADOPTION

### *Adoption curve of digital health categories*

The Consumer Adoption Curve equally weights the adoption of technologies in any of the six digital health categories: online health information, online health reviews, mobile health tracking, genetic services, wearables, and telemedicine. Each individual respondent is given a "point" for the historical usage of a digital health technology.

Non-adopters are individuals who have never adopted one of the digital health technologies. Super adopters are individuals who have adopted five or more technologies.

80% of respondents have adopted at least one digital health technologies while only 2% have adopted five or six.

Source: Rock Health consumer survey data (n = 4,017)  
 Note: "Healthy" status is assigned to any survey respondent who did not self-report: "Poor" or "Bad" health status; hospitalization in the last 12 months; multiple chronic illnesses; or 10+ physician visits in the the last 12 months. High income is defined as above the U.S. median of \$50,000 per year.

# Searching online for health information is the most well-adopted digital health category, with 40% of those who search acting directly upon the information they find.

## % SEARCHED FOR INFORMATION

PRESCRIPTION DRUGS



Information about prescription drugs or side effects

DIAGNOSIS



A diagnosis based on your symptoms

SUPPLEMENTS



Information about supplements

TREATMENT OPTIONS



Treatment options based on your diagnosis

## % ACTED UPON INFORMATION

As a percentage of those who had sought information



Asked his or her physician to prescribe a specific drug or asked to discontinue taking a specific drug



Proposed own diagnosis to his or her physician



Purchased or discontinued use of a supplement



Proposed a treatment to his or her physician

## ONLINE HEALTH INFORMATION

Search rates by information category

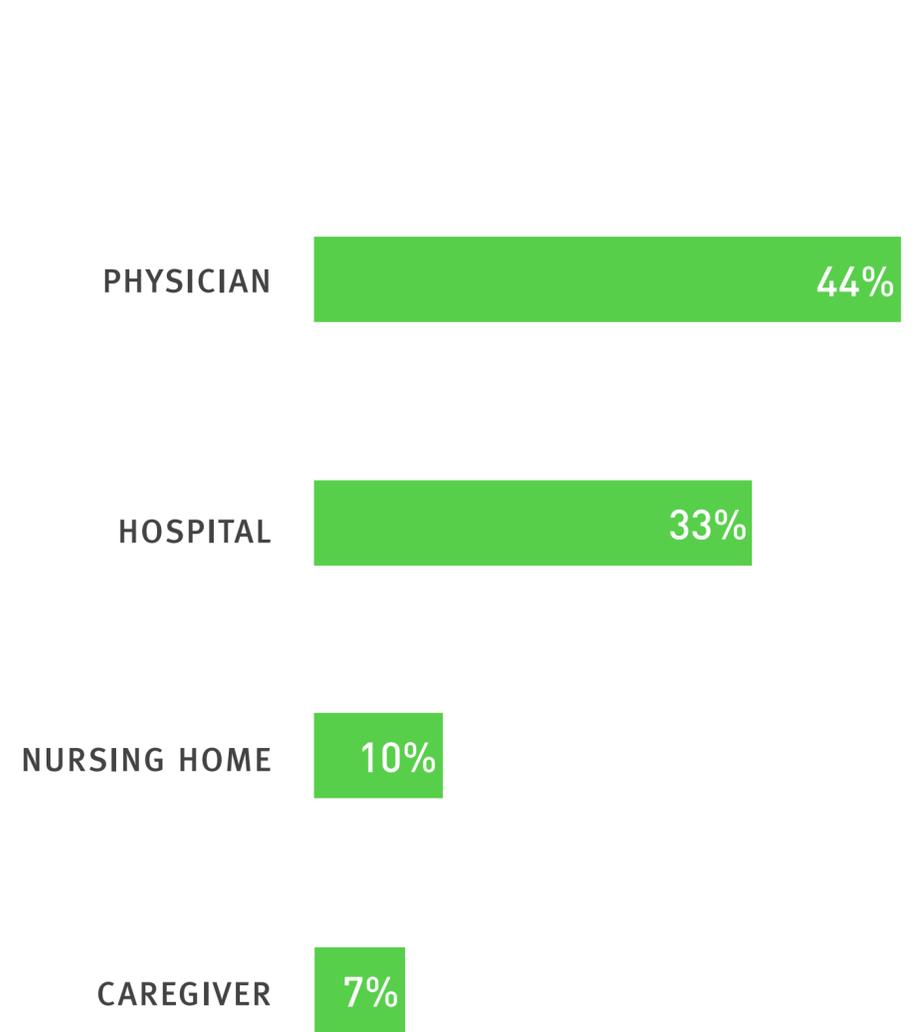
Across all four categories, 71% of consumers have previously searched online for health information.

When asked to force rank trustworthiness of health information sources, consumers ranked health websites, mobile health apps, and social media/online communities behind physicians and friends/family.

	AVG RANKING
Your physician	1.3
Any physician	2.6
Friends and family	3.2
Health websites	3.7
Mobile health apps	4.6
Social media / communities	5.6

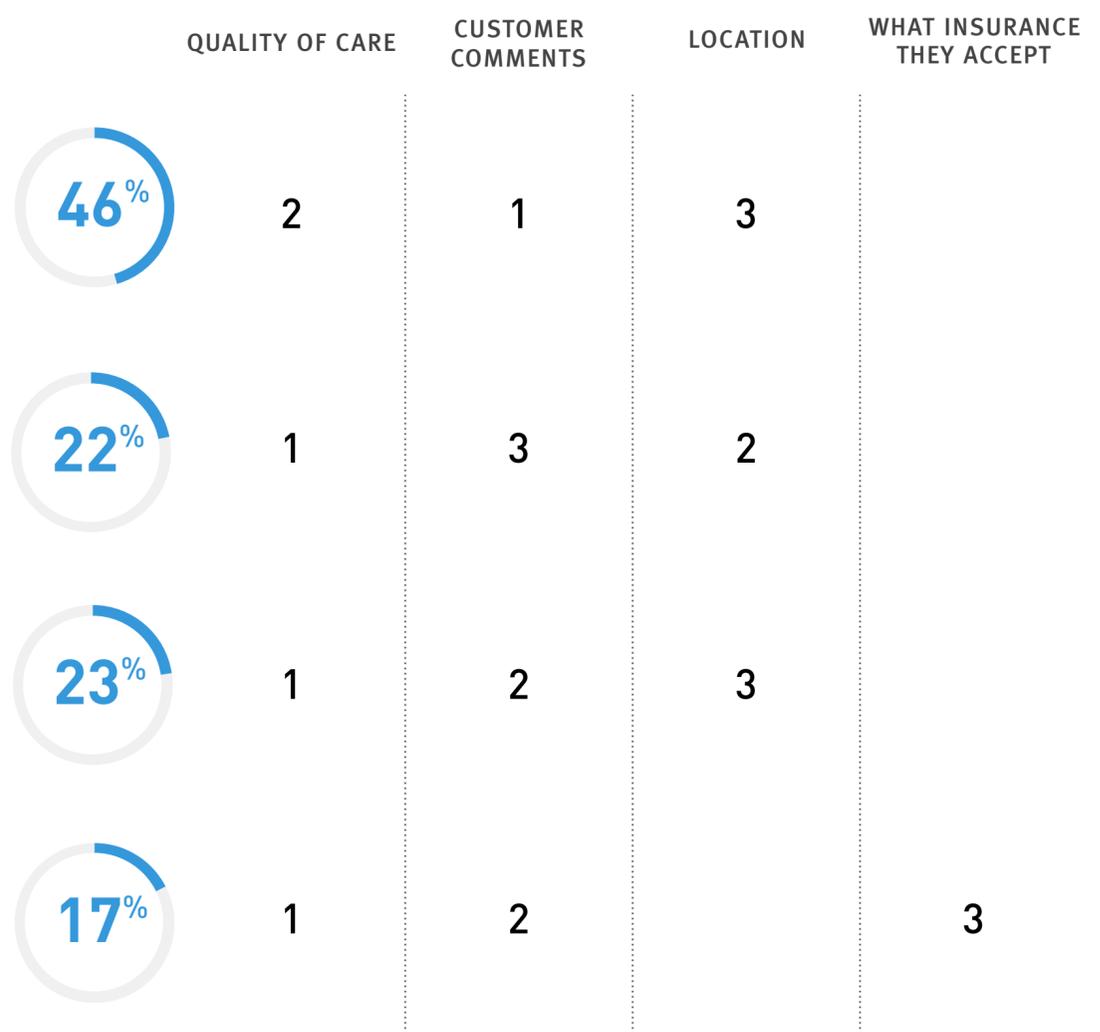
# Nearly half of Americans go online to find reviews of physicians, valuing customer comments and quality most when making a selection.

## % SOUGHT ONLINE REVIEW



## % SELECTED BASED UPON REVIEWS

Rankings of characteristics by helpfulness in decision-making



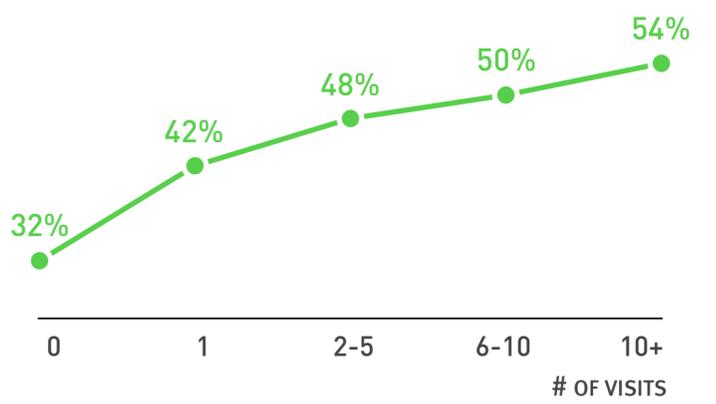
## ONLINE REVIEWS FOR HEALTHCARE

Adoption by service or professional

Across all categories, approximately 50% of respondents sought online reviews, more than half of which have used the reviews to make selection decisions.

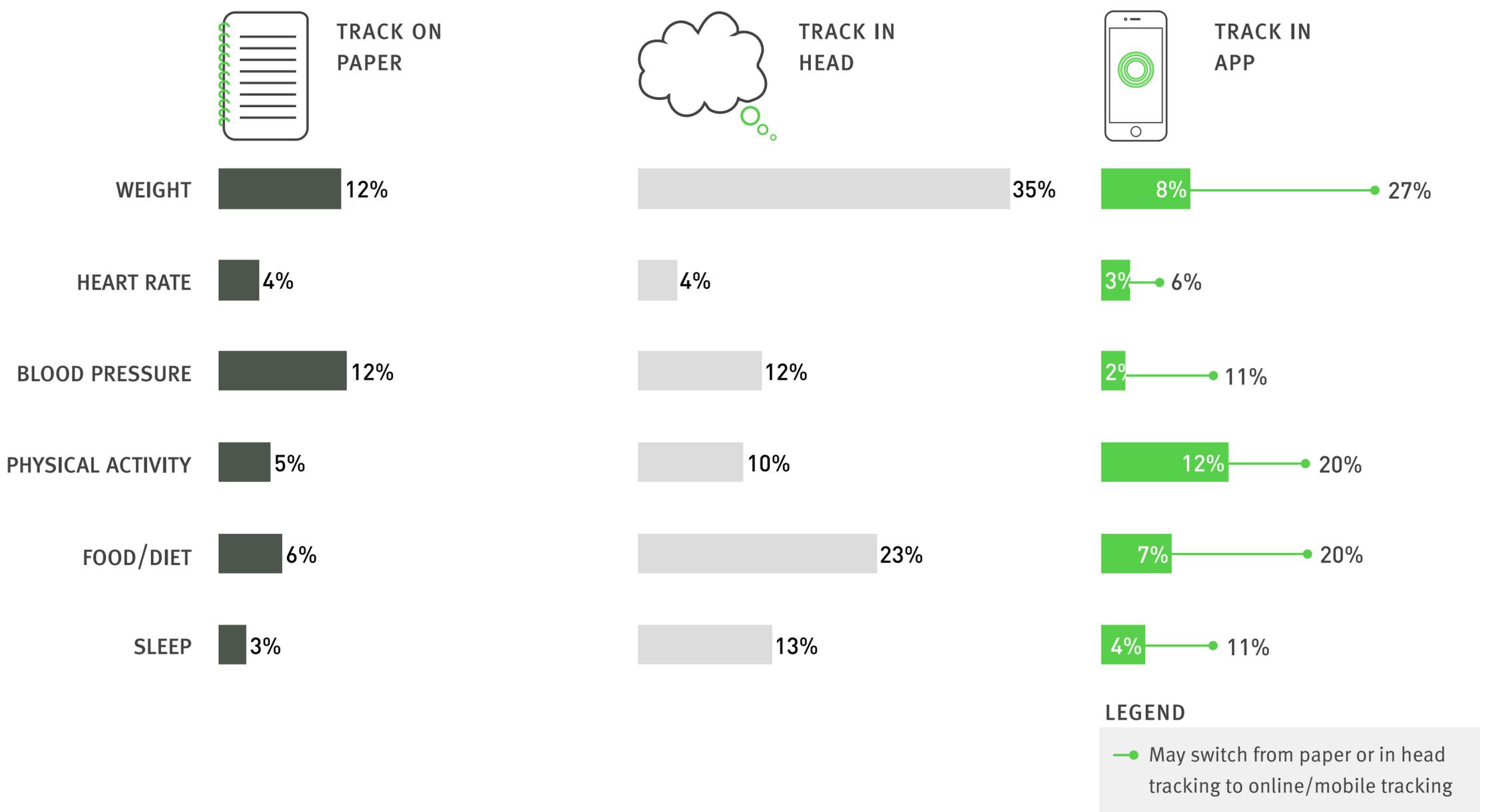
Approximately two-thirds of consumers who have not previously searched for online reviews (50% of all consumers) currently have no plans to do so.

Percentage seeking online reviews by number of physician visits in prior year:



Source: Rock Health consumer survey data (n = 4,017)

# With the exception of physical activity, more consumers are currently tracking key health factors on paper or in their heads than with mobile applications.



## MOBILE HEALTH TRACKING Percent currently tracking by health factor

Seventeen percent of the population is currently tracking a key health factor in a mobile application.

An additional 18% plan or may plan to track weight using online or mobile tools, while only an additional 3% may start tracking heart rate.

Physical activity tracking is the leader in mobile-based tracking likely due to the passive motion sensors included in every smartphone.

Core health factors that dominate on paper (weight, blood pressure) are the most likely to translate to mobile-based tracking.

Source: Rock Health consumer survey data (n = 4,017)  
 Note: May adopt figures only include individuals who are currently tracking

# Consumers are most likely to buy wearable devices for themselves with the intention of becoming active and losing weight.

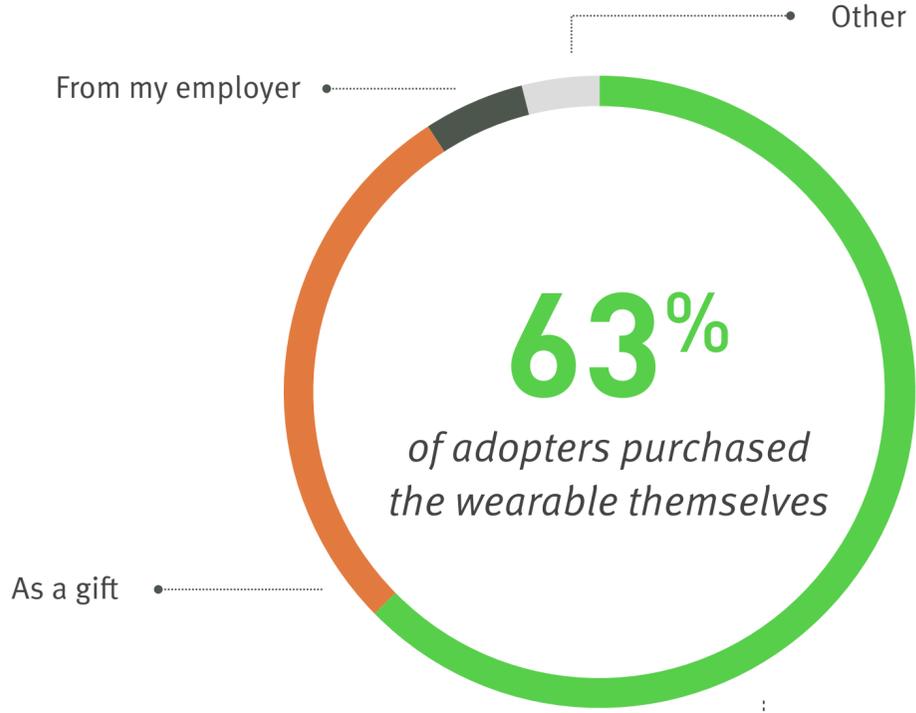
## WEARABLE ADOPTION

*Percentage of adoption by channel*

Adoption of wearables has reached 12%, with 63% of those consumers making the purchase on their own and 28% receiving the wearable as a gift, likely contributing to high attrition rates.

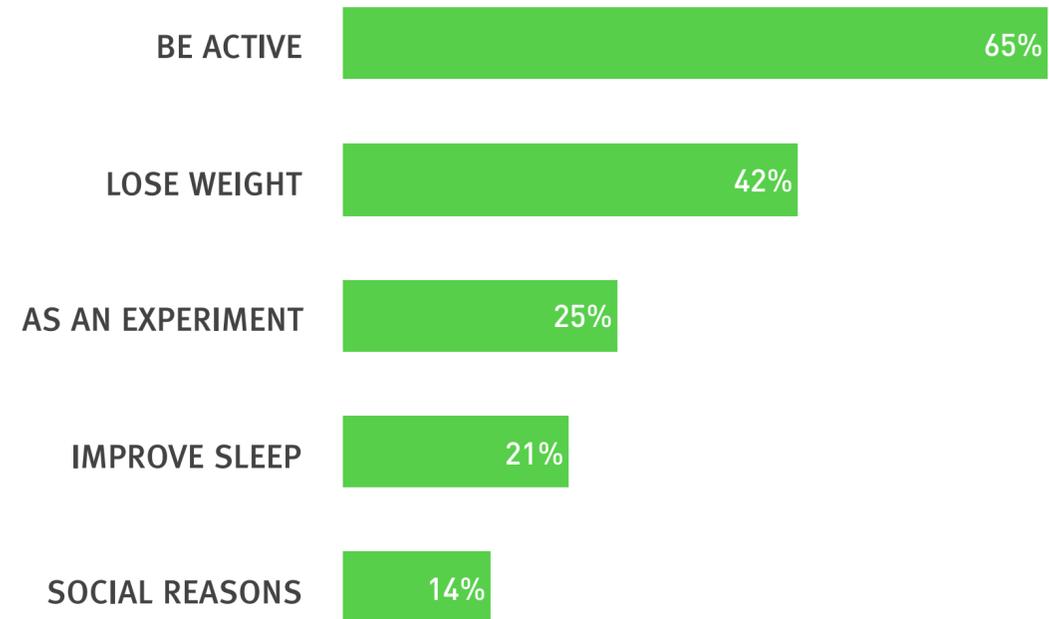
The demographics of wearable adopters have begun to shift, following explosive growth in the prior 12 months, representing 3x adoption growth.

Recent purchasers are more likely to be unhealthy, including high rates of hospitalization, countering the popular narrative of only healthy individuals purchasing wearables.



## REASONS FOR PURCHASE

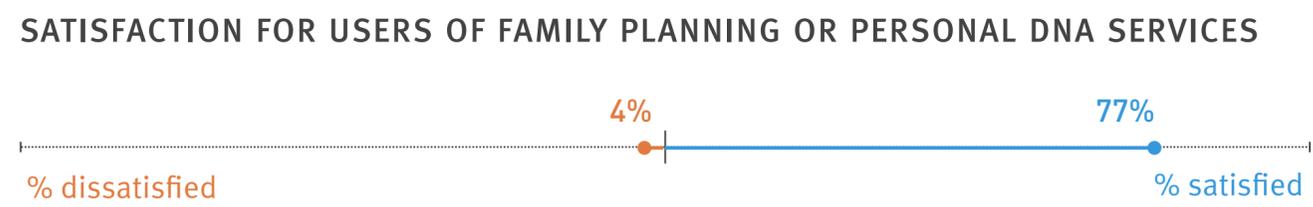
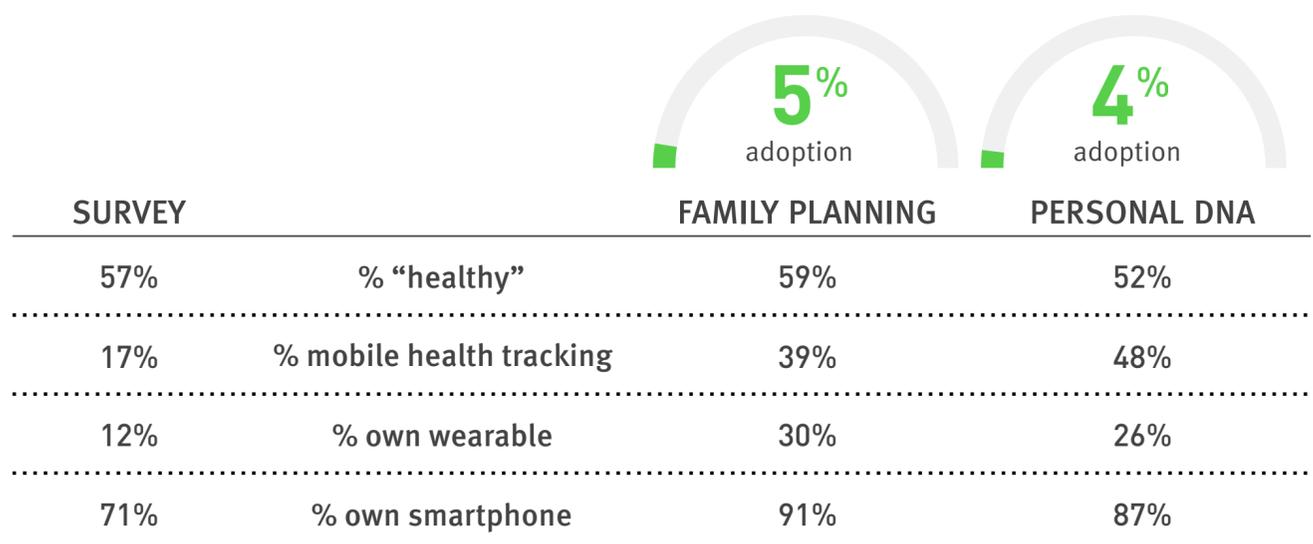
*Percent of purchasers indicating reason*



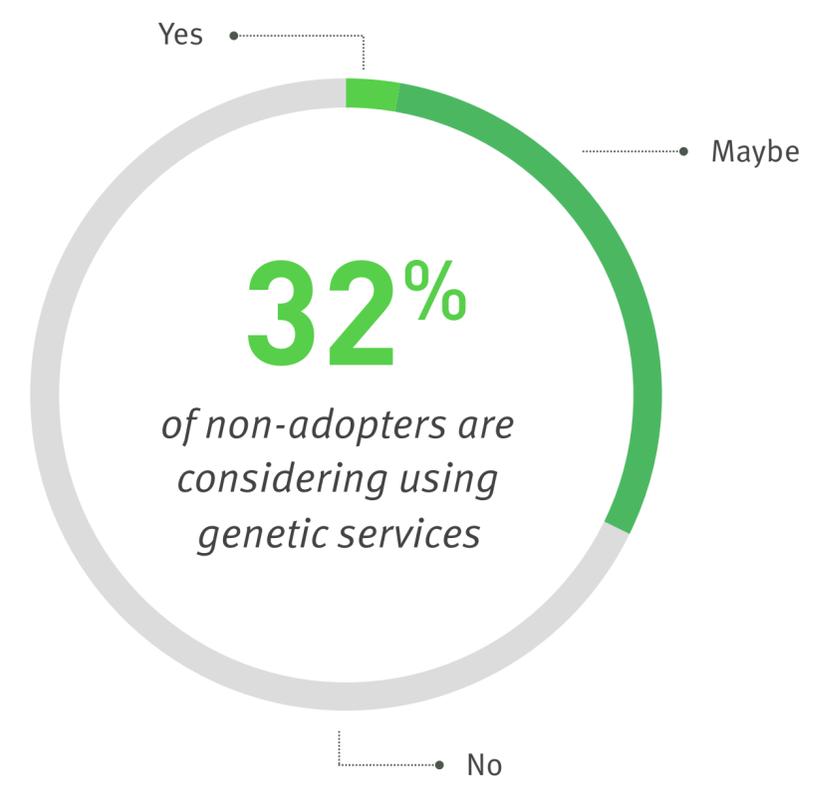
EARLY ADOPTER 12+ MONTHS		RECENT ADOPTER <3 MONTHS
48%	% female	41%
73%	% "healthy"	57%
4%	% hospitalized in last year	33%
28%	% agree willing to pay OOP	53%

Source: Rock Health consumer survey data (n = 4,017)  
 Note: All wearable responses were verified via free form response; wearables included smart watches with biosensing capabilities (e.g., Apple Watch)

# While consumer-driven adoption of genetic services is relatively low, satisfaction is high and many consumers are considering using these services in the future.



## NON-ADOPTER PLANS TO USE A GENETIC SERVICE



## GENETIC SERVICE ADOPTION

### Family planning and personal DNA testing

Historical usage of consumer-driven genetic services (family planning and personal DNA tests) remains low, at 7% between the two categories.

Adopters of these specific types of genetic services are significantly more likely to also engage in personal health tracking, including tracking of key health factors on their mobile phone (mobile health tracking) and using wearable devices.

More than two-thirds of non-adopters currently have no plans to use a genetic service, suggesting mainstream use cases beyond genealogy are still yet to be discovered.

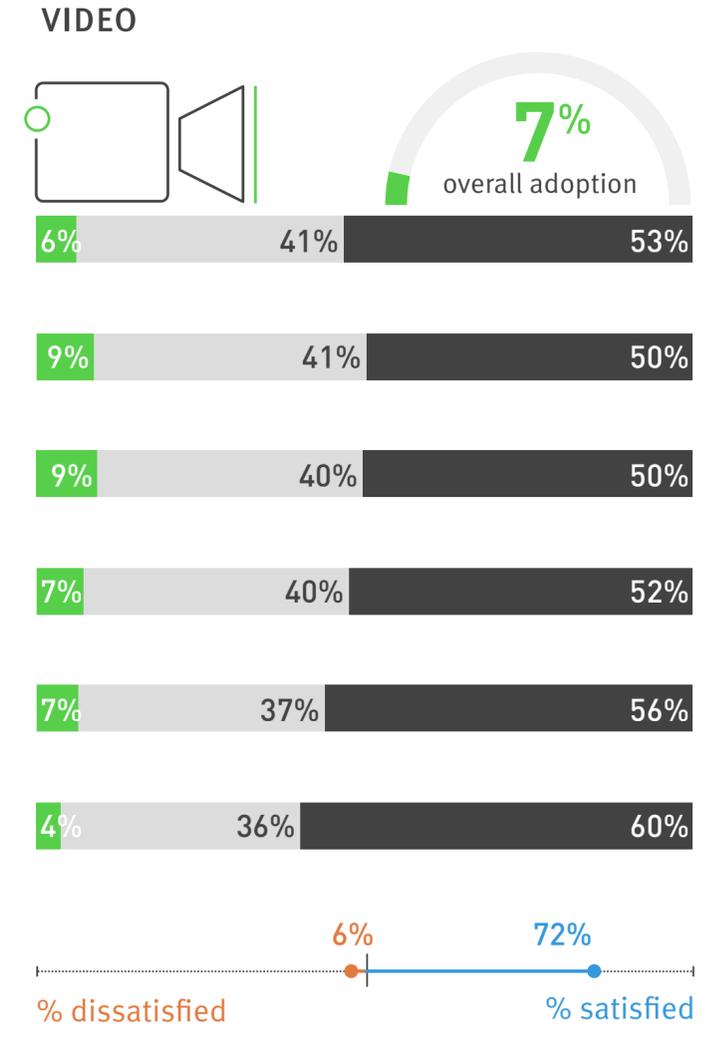
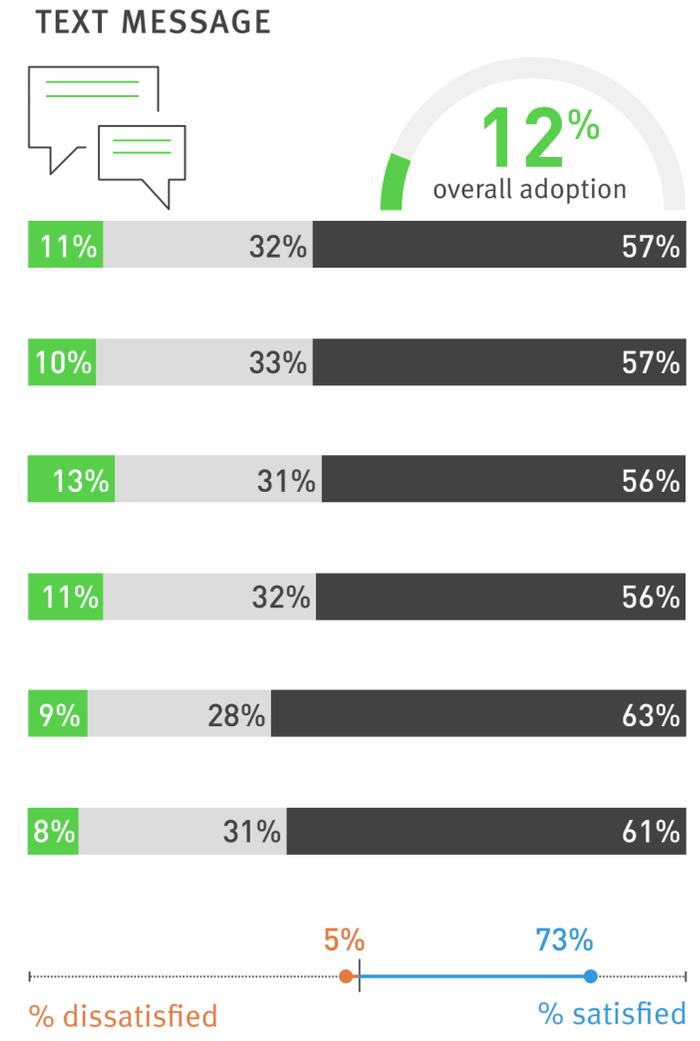
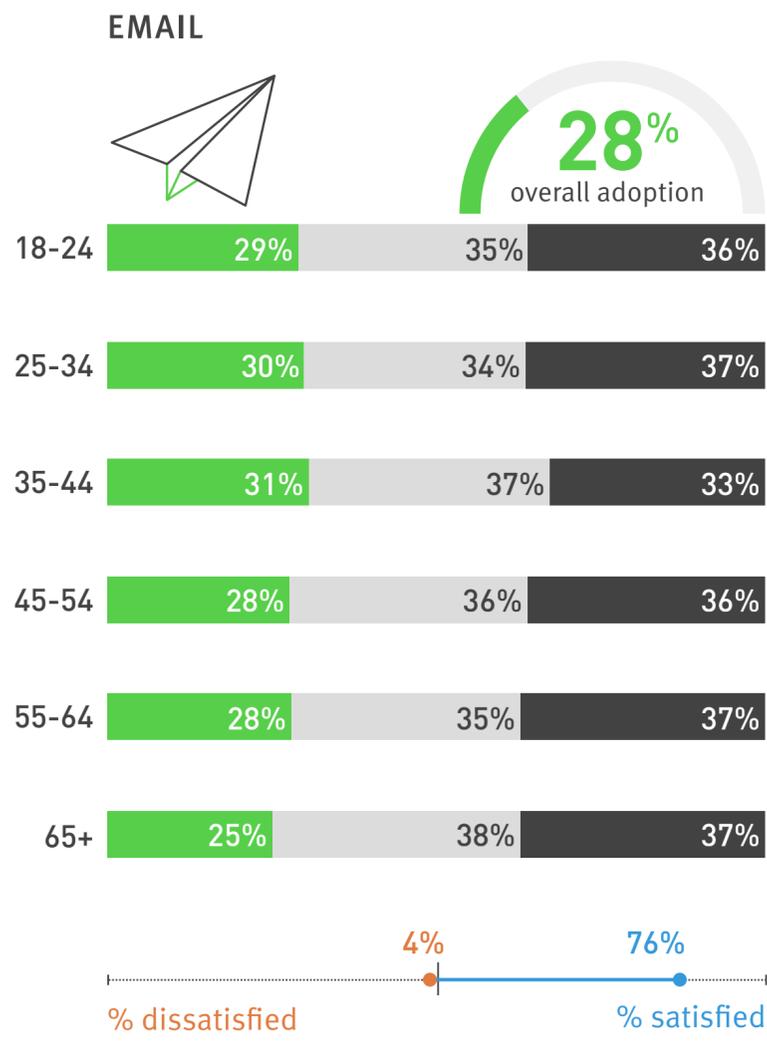
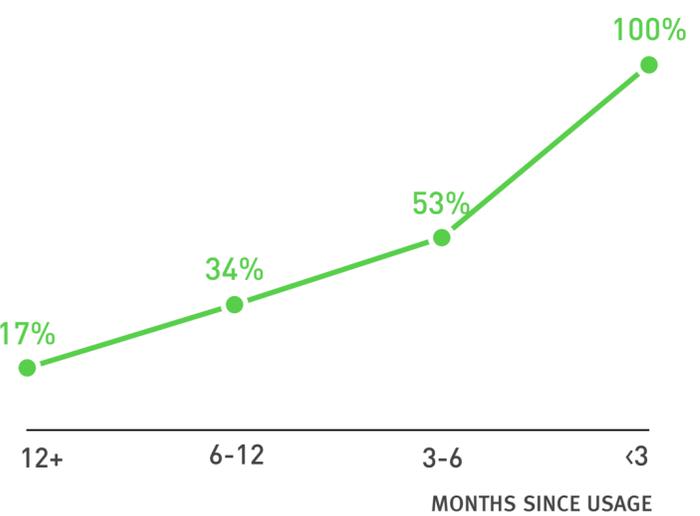
Source: Rock Health consumer survey data (n = 4,017)  
 Note: Consumers were surveyed on their plans to use any type of genetic service, including genealogy

# Usage of telemedicine is highest amongst the 35-54 age bracket across all mediums, with adopters reporting high satisfaction.

## USAGE OF TELEMEDICINE *Adoption and satisfaction by medium*

Telemedicine is an obvious hit with consumers, with those who use the channel highly satisfied overall. This suggests that the largest barrier to long-term replacement of many in-office visits is getting patients to their first virtual visit.

Nearly half of video-based telemedicine usage has occurred in the past 3 months:



**LEGEND**

- Used
- Planning to use
- No plans to use

Source: Rock Health consumer survey data (n = 4,017)



**ADAM JACKSON**

*Co-founder and CEO*



Doctor on Demand is a video telemedicine company, offering on-demand and scheduled visits with US-licensed healthcare providers via any smartphone, tablet, or computer.

“Trust and education are really important factors when it comes to overcoming adoption barriers, since they address concerns such as 'who are these doctors?' and 'what can they really do?'”

# Telephone is the preferred medium for telemedicine across both urgent and non-urgent use cases, although video ranks higher amongst those who have previously used it.

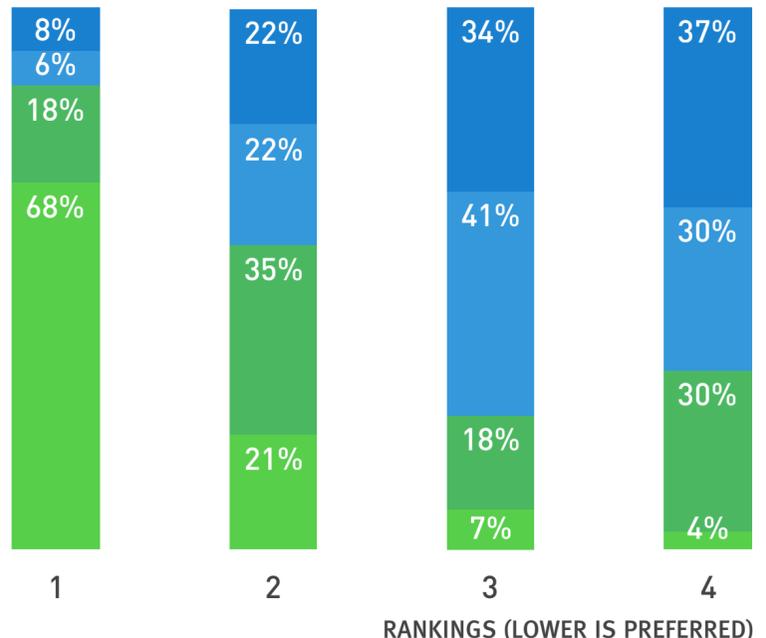
## PREFERRED TELEMEDICINE MEDIUM

*Rankings by medium (urgent and non-urgent)*

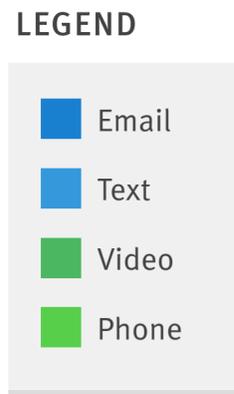
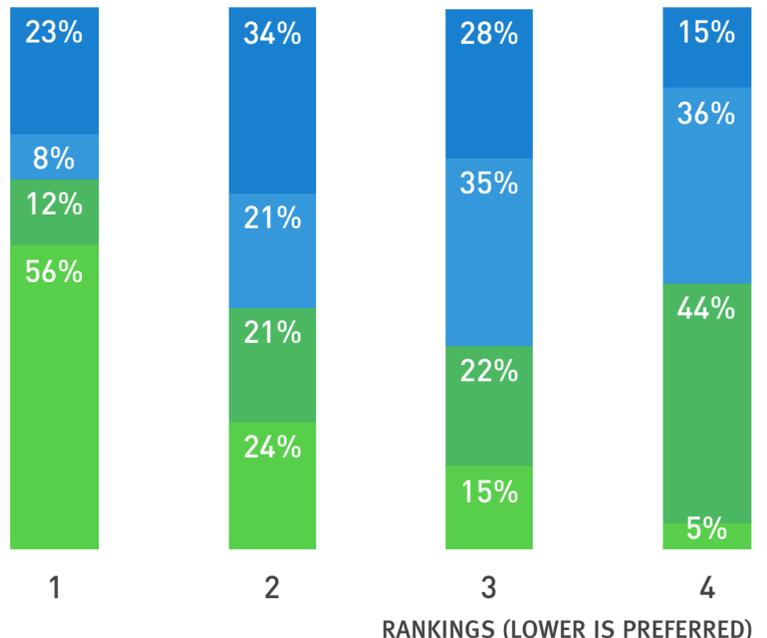
When asked to force rank the various potential mediums for a telemedicine encounter, consumers overwhelmingly prefer phone in both cases. Video is the second most-preferred option in an urgent situation, while email ranks second in non-urgent cases.

Preference for phone-based telemedicine, particularly in non-urgent use cases, appears to be an artifact of video being a nascent technology. For individuals who show a preference for video, their adoption rates are 2-2.5 times greater than those who ranked it non-preferable.

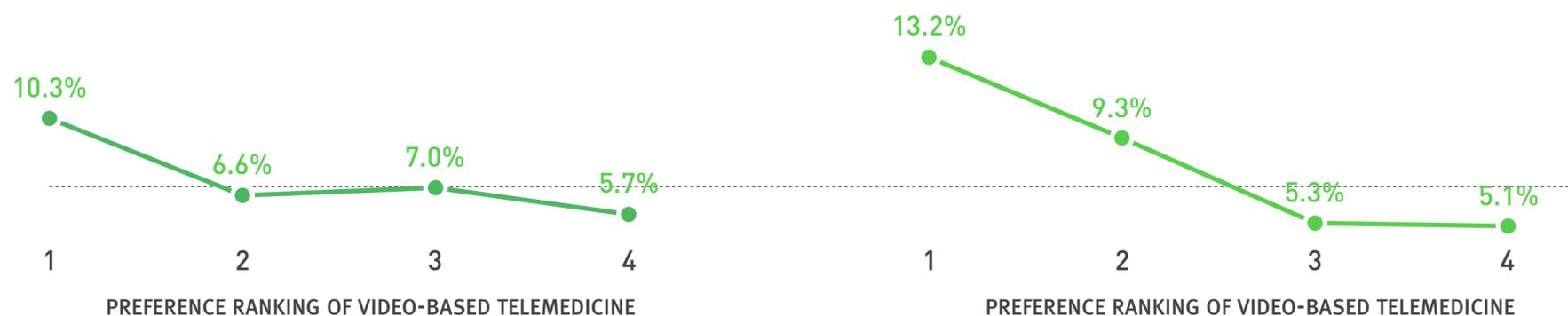
### URGENT USE CASE



### NON-URGENT USE CASE



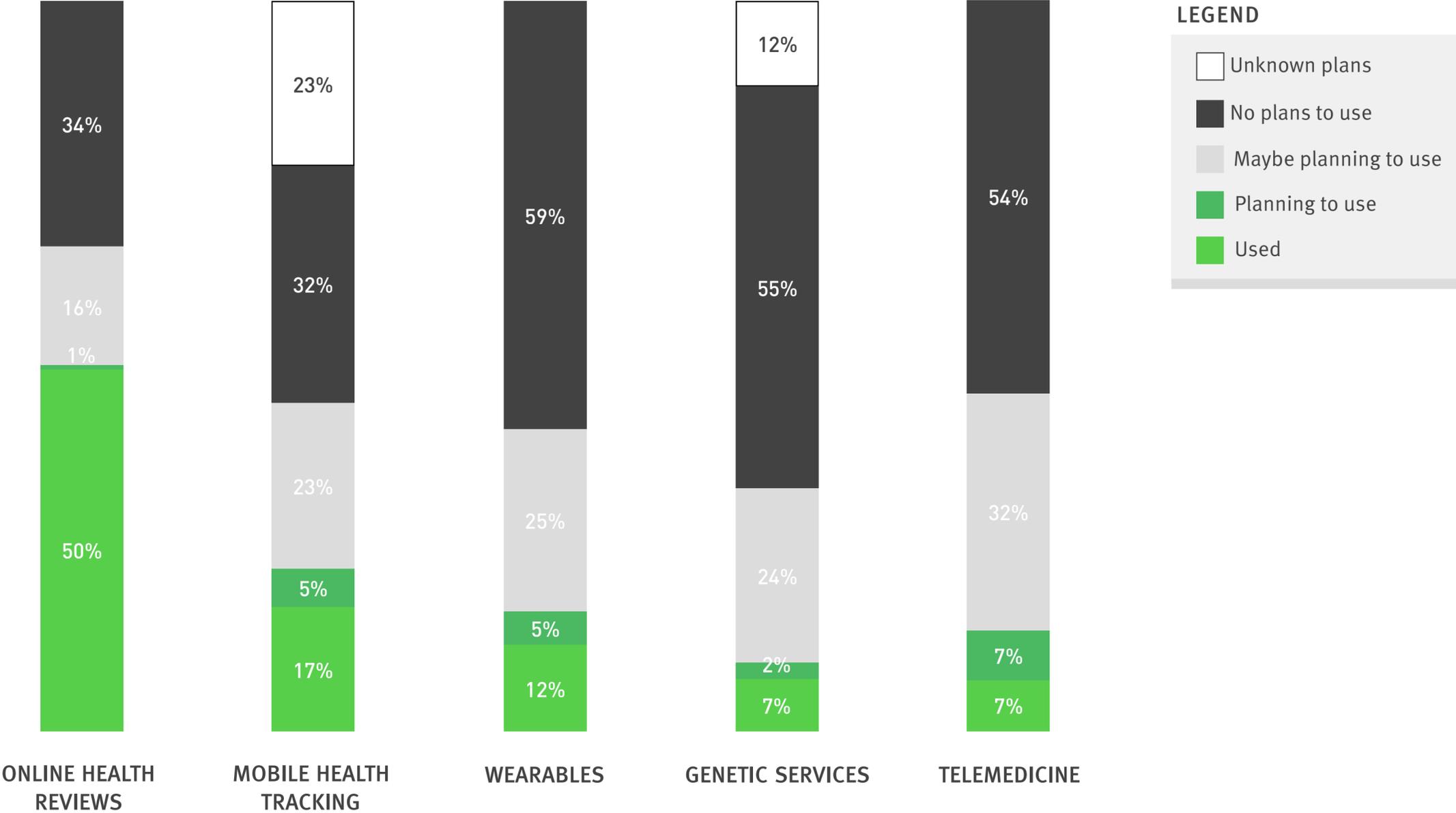
### ADOPTION OF VIDEO-BASED TELEMEDICINE BY RANK



Overall video-based telemedicine adoption rate

Source: Rock Health consumer survey data (n = 4,017)

# Wearables and telemedicine are set to be the fastest growing digital health markets in the near-term, with many also considering tracking health on their phone.



## ADOPTION CEILINGS

### *Adoption plans by category*

When asked whether they planned to adopt digital health technologies, consumers responded most favorably to telemedicine (100% adoption growth) and wearables (40%).

Nearly all of the digital health categories are under-penetrated relative to the number of individuals who are considering using them.

Online health reviews face the biggest challenge for growth, with the majority of the unaddressed market stating they have no plans to use a review service.

Source: Rock Health consumer survey data (n = 4,017)  
 Note: Consumers were surveyed on their plans to use any type of genetic service, including genealogy



## JUSTIN KAO

*Co-founder and SVP of Corporate  
Development, Operations, and  
Strategy*

## HELIX

Helix is building a platform that will empower consumers to discover and explore their own genomes through insights provided by their ecosystem of content partners.

“Historically, price and awareness have been the largest hurdles. Helix believes that consumer awareness of genetics is at an inflection point—hardly a week goes by without some mention of DNA in the media, often from a new discovery.”

# DRIVERS

*Adoption by health  
status and  
consumer  
attitudes*

# While 52% of consumers strongly agree they are responsible for their own health, only 7% would say the same about their willingness to pay out-of-pocket for healthcare.

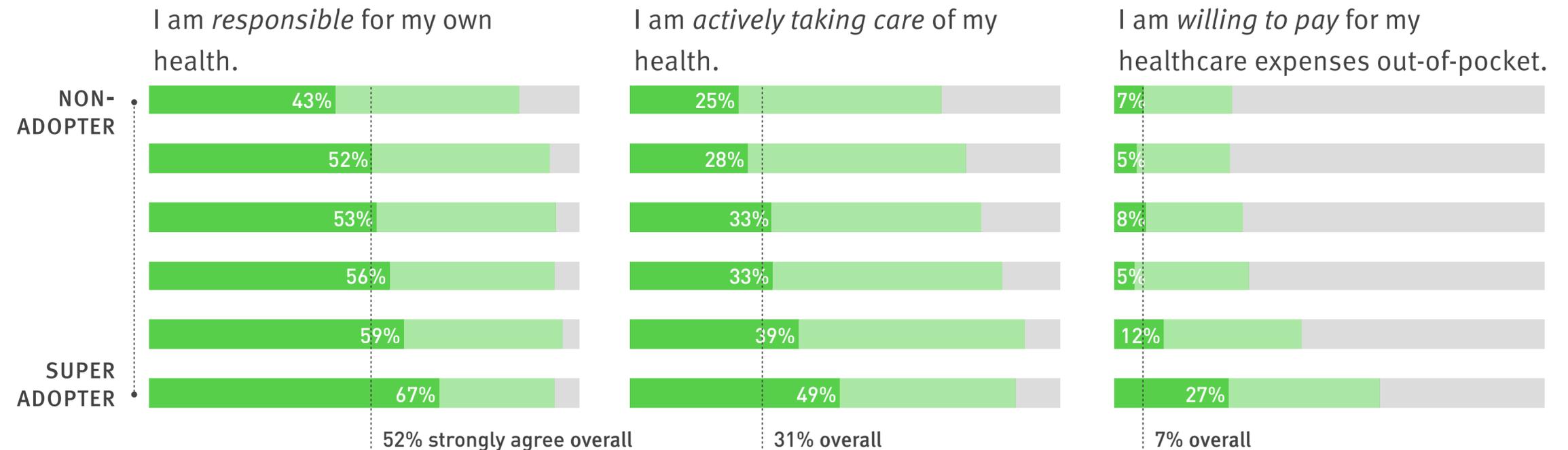
## CONSUMER INDEX QUESTIONS

% agreeing with attitudinal statements

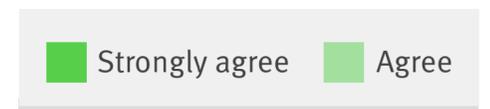
While consumers generally feel responsible for their health and many are actively taking care of their health, less than 10% strongly agree with the concept of paying for health care expenses out-of-pocket, creating significant challenges for B2C businesses in digital health.

Not surprisingly then, this set of attitudinal questions were highly correlated with the adoption of B2C digital health technologies.

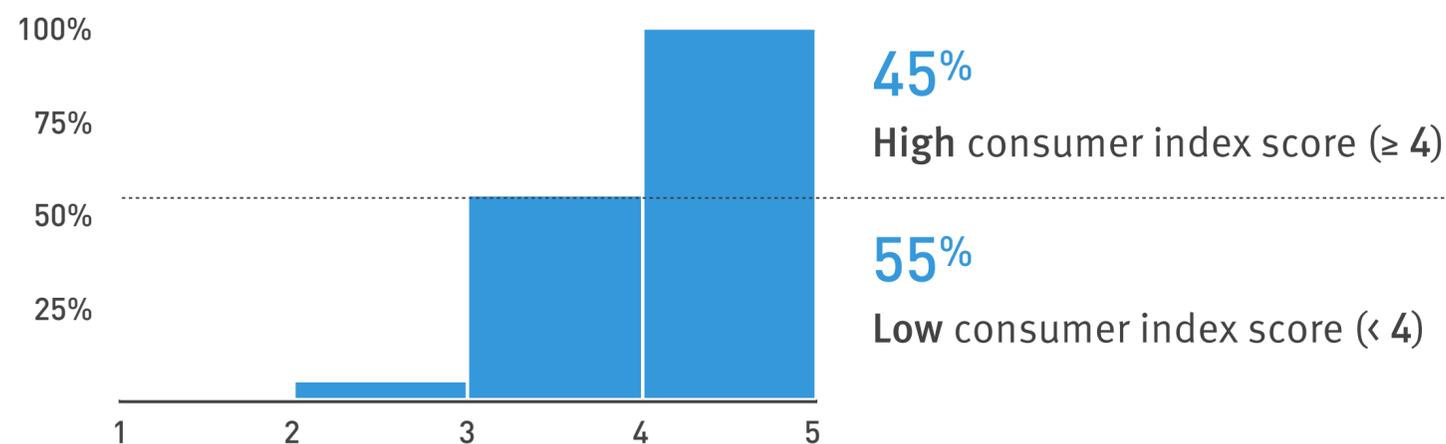
45% of respondents strongly agreed with at least two out of the three attitudinal questions and were considered to score “high” on the composite consumer index. All other respondents (55%) were classified as “low” on the index.



### LEGEND



### CUMULATIVE DISTRIBUTION BY CONSUMER INDEX SCORE



# The strongest indicators of adoption are health status and consumer attitudes, with unhealthy, highly consumer-oriented individuals adopting at the fastest rate.

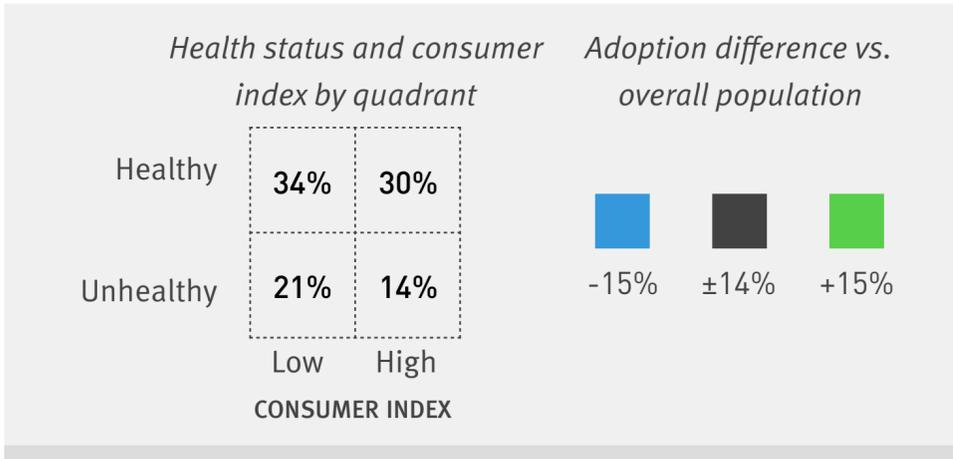
## DIGITAL HEALTH ADOPTION BY SEGMENT

*Adoption rates by health status and consumer index*

Adoption rates were reviewed at the intersection of self-reported health status and consumer orientation (see notes below for explanation).

The largest segment of the population (healthy and low consumer index, 34%) are the slowest adopters of digital health, while the smallest segment (unhealthy and high consumer index, 14%) are the fastest adopters.

### LEGEND



### ONLINE HEALTH INFORMATION

67%	71%
71%	81%

### ONLINE HEALTH REVIEWS

44%	52%
50%	59%

### MOBILE HEALTH TRACKING

16%	20%
10%	24%

### WEARABLES

11%	14%
6%	18%

### GENETIC SERVICES

5%	8%
5%	14%

### TELEMEDICINE

6%	8%
4%	12%

Source: Rock Health consumer survey data (n = 4,017)

Note: "Healthy" status is assigned to any survey respondent who did not self-report: "Poor" or "Bad" health status; hospitalization in the last 12 months; multiple chronic illnesses; or 10+ physician visits in the last 12 months.

Note: Consumer index is based upon scoring attitudinal questions around responsibility for one's own health, active care of one's own health, and willingness to pay out-of-pocket for healthcare expenses.

# DATA PRIVACY

*Attitudes towards  
data sharing and key  
industry stakeholders*

# While consumers vehemently agree they should be in control of health data access, the majority are willing to share data for personal and public health, along with discounts.

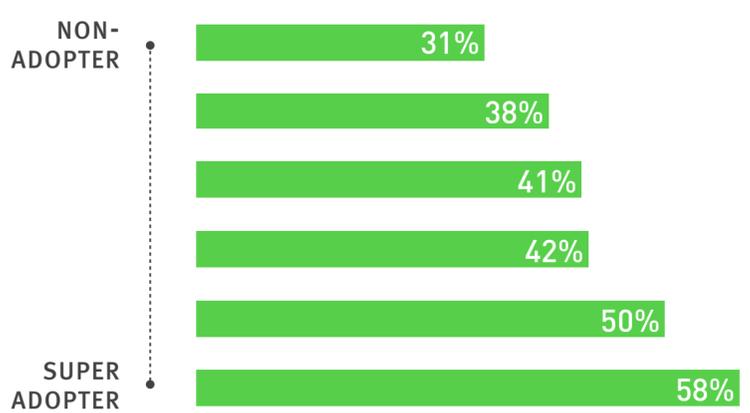
## ATTITUDES TOWARDS DATA PRIVACY

### Agreement with data sharing statements

More than 90% of consumers agreed or strongly agreed with the idea that they should be in control of access to their health data, and were then willing to dole out their data for improved care, research, and discounts.

Attitudes towards privacy were found to be correlated with adoption:

Percent in top two privacy quintiles by number of digital health technologies adopted



I should be in control of who has access to my health data



I would share my health data so I could receive better care from my doctor



I would share my health data to contribute to medical research



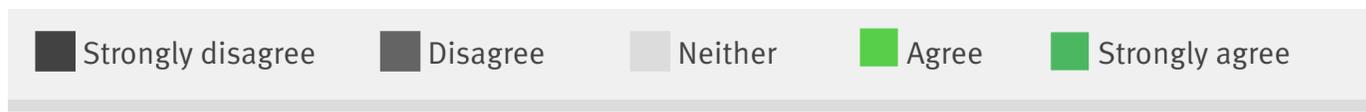
I would share my health data for a discount on my health insurance



I would share my health data in exchange for money



### LEGEND



Source: Rock Health consumer survey data (n = 4,017)

Note: A privacy index was created based upon answers to data sharing scenarios; consumers were then divided into quintiles based on an overall score.



**CHRISTINE LEMKE**

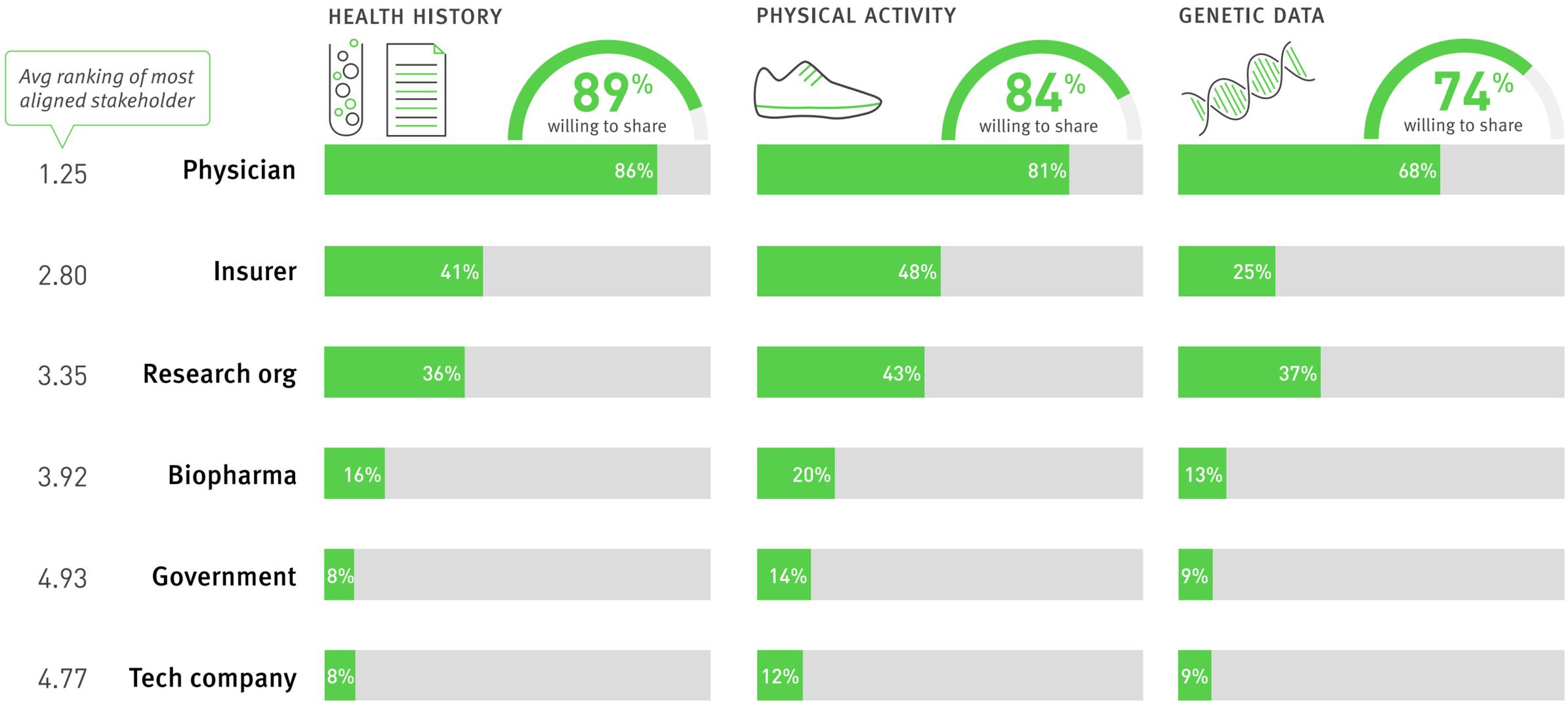
*Co-founder and Chief Product Officer*



Evidation Health is defining and demonstrating real-world value in the digital era of healthcare.

“When consumers are in control of their own data, they readily share it with health organizations. We see this daily and consistently, and it drives benefit to all healthcare stakeholders by increasing engagement and personalization of care.”

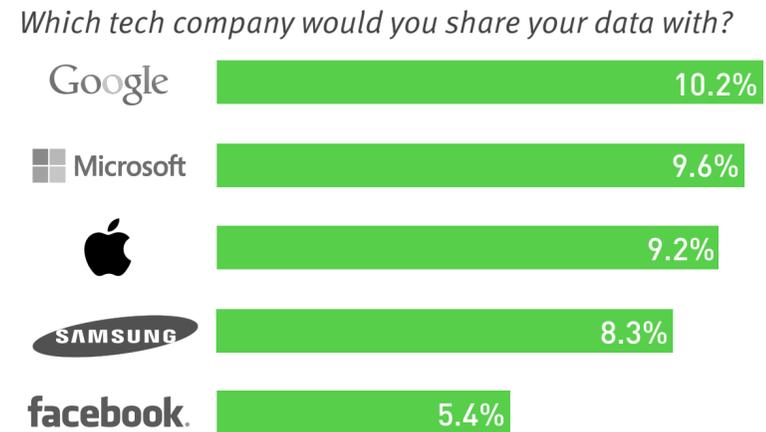
# Physicians remain at the center of data in the context of healthcare, with consumers more willing to share their information with them than anyone else.



## HEALTH DATA SHARING Percent willing to share by stakeholder

Consumers have a high willingness to share their health data with the industry ecosystem. However, absent physicians, sharing propensity drops by over a third across all health data types (health history—56% willing to share; physical activity—63%; genetic—47%).

Overall, only 18% are willing to share health data with technology companies:



Source: Rock Health consumer survey data (n = 4,017)  
 Note: Consumers were asked to force rank which stakeholder was most aligned with their personal health interests

# APPENDIX

*Methodology and  
survey tables*

# Methodology

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## SURVEY DEMOGRAPHIC DETAILS

**Qualifying Population.** Incidence rate of 90%. Individuals with personal internet access, either at home, work or via their mobile phones were eligible to take the survey. Additional screening was based on demographic requirements.

**Demographic Breakdown.** With a sample size of n=4,017, respondents were a nationally representative population based on US Census percentages for sex, age, and region. Soft quotas were met for household income and ethnicity.

**Survey Timing.** The full launch of the survey began on July 7, 2015 and ended on August 28, 2015.

**Data Quality.** We employed Toluna to deploy our survey. To ensure data quality, Toluna authenticates all respondents and further validates against third-party data sources including the U.S. Postal Service and telephone directories. Additionally, flash/cookie-based and digital fingerprinting technologies were used to ensure there are no duplicate respondents. Industry standards for screening bad completes were used such as red herring questions and monitoring time for speeders.

## BACKGROUND ON SURVEY

**Survey Design.** Rock Health conceived and wrote all questions and materials used in this survey. To ensure best practice survey techniques were used, Rock Health employed Toluna's internal questionnaire review team.

**Survey Analysis.** Findings from the data were based on internal analyses conducted with statistical tools such as R.

# Survey demographics: Age, income, sex, and education versus U.S. Census and by technology adoption

## AGE

US Census	Survey demographics		Shared on social media	Smartphone owner	Used an app
12%	12%	18-24	61%	75%	80%
18%	18%	25-34	63%	75%	79%
18%	16%	35-44	55%	73%	75%
19%	19%	45-54	59%	72%	76%
16%	16%	55-64	52%	65%	68%
17%	18%	65+	52%	65%	67%
100%	99%	<b>Overall total</b>	57%	71%	74%

## INCOME

US Census	Survey demographics		Shared on social media	Smartphone owner	Used an app
24%	21%	Less than \$25,000	55%	69%	74%
23%	27%	\$25,000-49,999	57%	70%	74%
17%	20%	\$50,000-74,999	61%	73%	76%
12%	12%	\$75,000-99,999	57%	71%	73%
14%	10%	\$100,000-149,999	54%	72%	74%
6%	2%	\$150,000-199,999	57%	68%	70%
6%	2%	\$200,000 or more	56%	74%	76%
100%	95%	<b>Overall total</b>	57%	71%	74%

## SEX

US Census	Survey demographics		Shared on social media	Smartphone owner	Used an app
51%	51%	Female	55%	68%	71%
49%	49%	Male	59%	74%	77%
100%	100%	<b>Overall total</b>	57%	71%	74%

## EDUCATION

US Census	Survey demographics		Shared on social media	Smartphone owner	Used an app
12%	2%	Less than high school	50%	68%	78%
30%	20%	High school graduate	58%	72%	76%
18%	28%	Some college	57%	71%	75%
9%	13%	Associate's degree	59%	70%	74%
19%	26%	Bachelor's degree	57%	71%	73%
8%	9%	Master's degree	53%	68%	69%
2%	3%	Graduate or professional	58%	71%	72%
1%	1%	PhD	68%	77%	77%
100%	100%	<b>Overall total</b>	57%	71%	74%

Source: Rock Health consumer survey data (n = 4,017)

Note: Totals of survey demographics may not add up to 100% due to respondents who preferred not to say

# Survey demographics (self-rated health): Prescription drug usage, hospitalizations, chronic illness, and doctor visits, and adoption of digital health technologies

## SELF-RATED HEALTH

Survey demographics		Taken prescription drug in last 12 months	Admitted to a hospital in last 12 months	Diagnosed with a chronic illness	Diagnosed with multiple chronic illness	6+ doctor's visits in the last 12 months
2%	Poor	93%	32%	97%	88%	51%
4%	Bad	87%	25%	87%	73%	48%
23%	Moderate	81%	18%	70%	47%	24%
56%	Good	69%	8%	42%	19%	9%
15%	Excellent	53%	7%	20%	6%	4%
100%	<b>Overall total</b>	71%	11%	48%	27%	14%

Survey demographics		Online health information	Online health reviews	Mobile health tracking	Wearables	Genetic-based service	Telemedicine
2%	Poor	68%	44%	7%	1%	6%	5%
4%	Bad	73%	59%	14%	5%	6%	10%
23%	Moderate	72%	47%	13%	10%	6%	6%
56%	Good	72%	49%	18%	12%	7%	7%
15%	Excellent	70%	51%	24%	18%	10%	9%
100%	<b>Overall total</b>	71%	50%	17%	12%	7%	7%

# Additional data for online health information

PERCENT WHO SEARCHED FOR INFORMATION ONLINE  
BY TOPIC OF INFORMATION CATEGORY

Survey demographics		Drugs	Supplements	Diagnosis	Treatment
<b>Age</b>					
30%	% age <35	58%	53%	58%	50%
35%	% age 35 - 55	60%	52%	58%	48%
34%	% age 55+	61%	51%	55%	49%
<b>Other demographics</b>					
49%	% high income	59%	51%	56%	49%
36%	% college graduate	60%	51%	56%	49%
16%	% rural	62%	53%	59%	50%
65%	% "healthy"	56%	54%	55%	45%
<b>Tech adoption</b>					
71%	% own smartphone	64%	57%	62%	54%
12%	% own wearable	75%	73%	55%	64%
<b>Overall total</b>		60%	57%	52%	49%

PERCENT WHO SEARCHED FOR INFORMATION ONLINE  
AND THEN ACTED UPON BY INFORMATION CATEGORY

	Drugs	Supplements	Diagnosis	Treatment
	18%	19%	25%	17%
	21%	17%	24%	17%
	21%	16%	23%	16%
	20%	17%	25%	17%
	20%	18%	24%	16%
	21%	18%	27%	19%
	15%	14%	21%	13%
	23%	19%	28%	19%
	29%	29%	35%	26%
	20%	17%	24%	17%

# Additional data for online health reviews

## ADOPTION BY CENSUS, HEALTH, AND ADDITIONAL DEMOGRAPHICS

Survey demographics		Physician	Hospital	Nursing home	Caregivers
<b>Age</b>					
30%	% age <35	46%	34%	10%	7%
35%	% age 35 - 55	44%	35%	10%	7%
34%	% age 55+	43%	30%	10%	6%
<b>Other demographics</b>					
49%	% high income	45%	34%	10%	7%
36%	% college graduate	44%	33%	11%	7%
16%	% rural	44%	34%	9%	7%
65%	% "healthy"	42%	30%	9%	6%
<b>Tech adoption</b>					
71%	% own smartphone	49%	37%	11%	8%
12%	% own wearable	63%	46%	16%	13%
71%	% sought info online	54%	41%	12%	9%
<b>Overall total</b>		44%	33%	10%	7%

## MOST HELPFUL INFORMATION FOR SELECTING A PROVIDER OR SERVICE

(AS A PERCENTAGE OF THOSE WHO SOUGHT ONLINE REVIEWS)

	Overall	Physician	Hospital	Nursing home	Caregivers
61%	<b>Quality of care</b>	54%	66%	76%	71%
57%	<b>Customer comments</b>	55%	51%	66%	56%
52%	<b>Location</b>	46%	57%	63%	35%
48%	<b>What insurance they accept</b>	46%	47%	44%	54%
28%	<b>Appointment availability</b>	26%	26%	16%	40%
21%	<b>Ease of scheduling</b>	21%	24%	18%	46%
12%	<b>Price</b>	12%	20%	35%	46%

# Demographic profiling by health status/consumer index segment

## SURVEY POPULATION BY SEGMENT

Survey demographics		Healthy High consumer	Healthy Low consumer	Unhealthy High consumer	Unhealthy Low consumer
<b>Age</b>					
30%	% age <35	30%	26%	33%	29%
35%	% age 35 - 55	37%	35%	35%	35%
34%	% age 55+	32%	38%	33%	36%
<b>Other</b>					
51%	% female	47%	56%	49%	55%
49%	% high income	52%	49%	47%	48%
36%	% college	36%	36%	35%	39%
16%	% rural	16%	16%	16%	18%

Source: Rock Health consumer survey data (n = 4,017)

# Demographic profiling by health status/consumer index segment and adoption

## ONLINE HEALTH INFORMATION BY SEGMENT

Overall adoption		Healthy High consumer	Healthy Low consumer	Unhealthy High consumer	Unhealthy Low consumer
<b>Age</b>					
30%	% age <35	31%	27%	33%	29%
35%	% age 35 - 55	39%	35%	35%	34%
34%	% age 55+	31%	38%	32%	37%
<b>Other</b>					
51%	% female	47%	56%	50%	55%
49%	% high income	52%	49%	47%	46%
36%	% college	37%	36%	33%	38%
16%	% rural	16%	17%	17%	18%

## ONLINE HEALTH REVIEWS BY SEGMENT

Overall adoption		Healthy High consumer	Healthy Low consumer	Unhealthy High consumer	Unhealthy Low consumer
<b>Age</b>					
31%	% age <35	31%	26%	36%	30%
36%	% age 35 - 55	37%	37%	35%	35%
33%	% age 55+	33%	37%	29%	36%
<b>Other</b>					
50%	% female	48%	55%	45%	55%
50%	% high income	54%	48%	47%	49%
37%	% college	38%	37%	35%	38%
16%	% rural	15%	16%	17%	18%

Source: Rock Health consumer survey data (n = 4,017)

# Demographic profiling by health status/consumer index segment and adoption

## MOBILE HEALTH TRACKING BY SEGMENT

Overall adoption		Healthy High consumer	Healthy Low consumer	Unhealthy High consumer	Unhealthy Low consumer
<b>Age</b>					
34%	% age <35	34%	40%	35%	29%
35%	% age 35 - 55	39%	31%	31%	36%
31%	% age 55+	27%	30%	34%	36%
<b>Other</b>					
52%	% female	51%	49%	53%	54%
53%	% high income	60%	55%	47%	50%
36%	% college	39%	38%	32%	36%
18%	% rural	19%	14%	17%	21%

## WEARABLES BY SEGMENT

Overall adoption		Healthy High consumer	Healthy Low consumer	Unhealthy High consumer	Unhealthy Low consumer
<b>Age</b>					
32%	% age <35	29%	43%	36%	28%
35%	% age 35 - 55	42%	28%	28%	38%
32%	% age 55+	29%	30%	36%	34%
<b>Other</b>					
50%	% female	51%	48%	50%	49%
50%	% high income	59%	46%	44%	44%
38%	% college	43%	35%	30%	42%
21%	% rural	22%	13%	22%	24%

# Demographic profiling by health status/consumer index segment and adoption

## GENETIC SERVICES BY SEGMENT

Overall adoption		Healthy High consumer	Healthy Low consumer	Unhealthy High consumer	Unhealthy Low consumer
<b>Age</b>					
32%	% age <35	30%	26%	31%	37%
36%	% age 35 - 55	34%	38%	31%	40%
33%	% age 55+	35%	36%	38%	23%
<b>Other</b>					
48%	% female	34%	64%	54%	49%
51%	% high income	46%	63%	59%	45%
33%	% college	33%	30%	32%	35%
19%	% rural	24%	12%	17%	19%

## TELEMEDICINE BY SEGMENT

Overall adoption		Healthy High consumer	Healthy Low consumer	Unhealthy High consumer	Unhealthy Low consumer
<b>Age</b>					
33%	% age <35	35%	29%	40%	25%
41%	% age 35 - 55	42%	43%	33%	49%
25%	% age 55+	23%	29%	27%	25%
<b>Other</b>					
36%	% female	38%	23%	36%	40%
47%	% high income	46%	46%	49%	48%
33%	% college	36%	24%	32%	35%
16%	% rural	19%	17%	10%	18%

# ROCK HEALTH+



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## GET OUR DATA AND SUPPORT OUR WORK

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For further analysis, the raw survey data (representing all 4,017 individuals) and survey instrument are available as a standalone download or part of an overall research subscription on our website (that also includes our funding database). Rock Health's research subscription includes venture funding data (dating back to 2011), the consumer survey data, reports, and access to subscriber webinars.

Please visit [rockhealth.com/research](https://rockhealth.com/research) to learn more.