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CTA DIGITAL HEALTH RESEARCH BUNDLE

This bundle brings together CTA research to help digital health companies understand healthcare practitioner challenges, AI adoption considerations, and consumer needs shaping digital health adoption and use.

Built from CTA research used year-round to guide the consumer technology ecosystem, these insights support informed planning and decision-making for 2026.

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How to Use This Research Bundle

- AI's Impact and Opportunity Among Healthcare Practitioners
- The Future of Women's Digital Health Solutions

This bundle combines complementary CTA research to provide a more complete view of the digital health landscape. Together, the reports examine practitioner workflows and challenges, the role of AI in healthcare settings, and consumer perspectives that influence adoption and engagement.

Use this research to:

- Understand practitioner workflows, challenges, and adoption barriers
- Evaluate how AI technologies are being used and where opportunities exist
- Inform product development, positioning, and go-to-market planning
- Support data-driven decision-making for 2026 strategy development

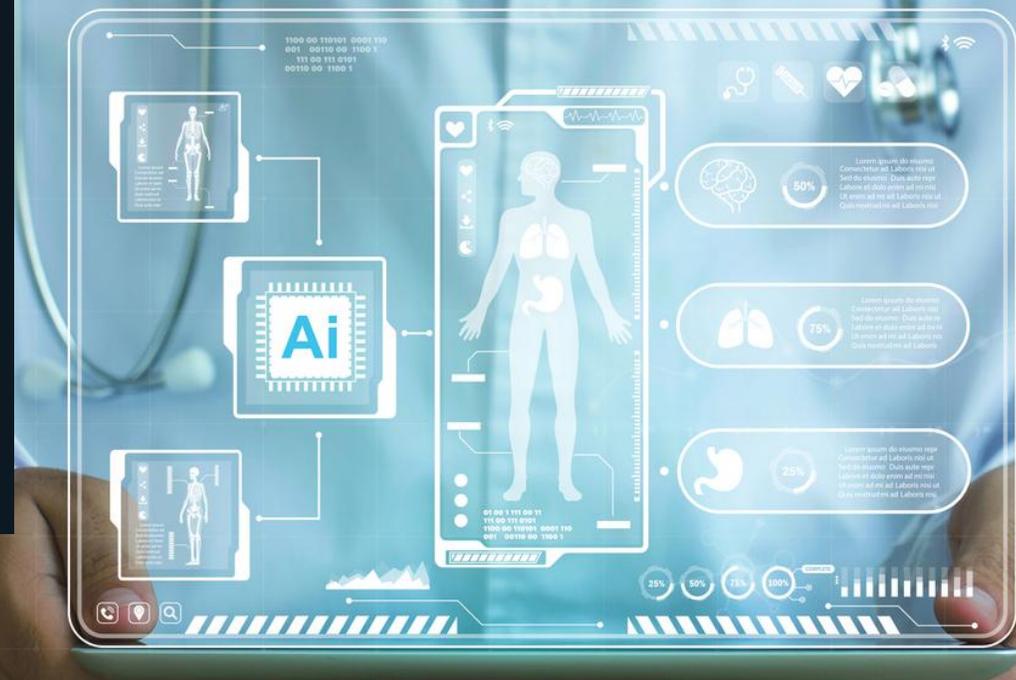
This bundle is designed for product, clinical, marketing, and business teams seeking real-world insight to guide digital health strategy.

Learn more about CTA membership at [CTA.tech/membership](https://cta.tech/membership).

AI's Impact and Opportunity Among Healthcare Practitioners

The Authoritative Source for Consumer
Technology Market Research

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About CTA & CES

About Consumer Technology Association:

As North America's largest technology trade association, CTA is the tech sector. Our members are the world's leading innovators — from startups to global brands — helping support more than 18 million American jobs. CTA members enjoy benefits including policy advocacy, market research, technical education, industry promotion, standards development and the fostering of business and strategic relationships. CTA also owns and produces CES® — the most powerful tech event in the world. Find us at [CTA.tech](https://cta.tech). Follow us [@CTAtech](https://twitter.com/CTAtech).

About CES:

CES® is the most powerful tech event in the world — the proving ground for breakthrough technologies and global innovators. This is where the world's biggest brands do business and meet new partners, and the sharpest innovators hit the stage. Owned and produced by the Consumer Technology Association (CTA)®, CES features every aspect of the tech sector. CES 2026 will take place on Jan. 6-9, 2026. Learn more at [CES.tech](https://ces.tech) and follow [@CES](https://twitter.com/CES) on [social](#).

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Research Objectives

CTA's *AI's Impact and Opportunity Among Healthcare Practitioners* was conducted to better understand the challenges healthcare practitioners (HCPs) currently face in their daily job tasks, as well as how tools and technologies powered by artificial intelligence (AI) can help address their challenges and improve their day-to-day activities and patients' experiences.

Specifically, the research aimed to understand:

- 1 Overall challenges currently experienced among HCPs
- 2 Awareness and usage of AI technologies that can support HCPs in their daily work
- 3 Challenges currently experienced among HCPs specifically when using AI technologies
- 4 Interest among HCPs in using new AI technologies in the future
- 5 Barriers to adopting new AI technologies in the future
- 6 Areas of opportunity for AI in the future for HCPs

Methodology

The study was administered through in-depth interviews and an online ethnography.



In-Depth Interviews

In-depth interviews were conducted with ten licensed and actively practicing U.S. HCPs responsible for direct patient care, including:

- Nurses (2)
- Primary care physicians (PCPs) (2)
- Specialists (2)
- Emergency surgeons (2)
- Non-emergency surgeons (2)

Interviews took place virtually, lasted approximately one hour each and were conducted June 13 to 27, 2025. Participants were incentivized for the session and provided consent for all content in the report.

Participants in the in-depth interviews and online ethnography were also screened to be either:

- **AI users:** Actively using AI in the workplace, or
- **AI considerers:** Not currently using AI in the workplace, but expect it to be implemented at work within the next five years



Online Ethnography

A mobile-friendly online ethnography was administered among 27 licensed and actively practicing U.S. HCPs responsible for direct patient care, including:

- Nurses (5)
- Primary care physicians (PCPs) (3)
- Specialists (4)
- Emergency surgeons (1)
- Non-emergency surgeons (5)
- Residency students (4)
- Paramedics (5)

The ethnography included daily activities to observe diverse, real-life environments for in-context learning through photo, video, poll and text responses. It was fielded for 13 days (June 18 to 30, 2025) and required about 20 minutes per day over three consecutive days. Participants were incentivized for the session and provided consent for all content in the report.

Methodology (Continued)

CTA designed this study in its entirety and is responsible for all content contained in this report. CTA is a member of the Insights Association and adheres to the research and analysis guidelines set forth in the Insights Association Code of Standards and Ethics.

Important Notice: This study is based on qualitative research relating to HCP beliefs and experiences. The purpose is to provide insights into how actual HCPs use and perceive AI technology. The report includes verbatim input from HCPs, which may mention specific brands or products supplied by HCPs. Please note that this does not imply an endorsement of any specific product by the Consumer Technology Association (CTA®).

1

Background



Background*

Global healthcare AI adoption rates are expected to rise to 45% by 2030, leading to an estimated \$222 billion in revenue gains.¹

- **66 percent of HCPs reported using AI in late 2024, a significant increase from 38 percent in 2023.²**
- **62 percent of healthcare leaders say generative AI has the greatest potential in consumer engagement and experience.** However, only **29 percent** of these leaders say their organizations have started implementing GenAI for any purpose.⁴
- **Clinicians spend nearly 28 hours per week on administrative tasks.** This includes about nine hours on documentation and ten hours on communication.³
- **60 percent of U.S. adults report they would feel uncomfortable if their healthcare provider relied on AI for their medical care.** HCPs cannot fully be replaced, and AI tools must show proven testing and validation for increased adoption.⁵

* Please note that this slide is based on secondary data.

¹Strategy&, ²AMA, ³Google/Harris Poll, ⁴McKinsey, ⁵Pew Research Center

2

Key Findings



Key Findings (Continued on Next Slide)

1

AI adoption in healthcare is in its early stages and lacks formal structure.

HCPs report that AI adoption in their organizations is still early-stage, with little training, guidance or formal strategy in place. Many HCPs are independently exploring AI tools, relying on self-teaching or peer support rather than organizational direction.

2

HCPs' trust in AI is cautious and task-specific.

While providers generally trust AI, this trust is conditional and depends on the task. HCPs are more confident using AI for documentation, diagnostics (with human oversight) and predictive analysis than they are for emotionally nuanced care, ethical decisions or high-stakes judgments. They trust AI more for their own use than for patients, citing concerns about misinformation, anxiety and weakened doctor-patient relationships. Ultimately, they see AI as a tool to support — not replace — their expertise.

3

HCPs recognize AI's benefits but also significant barriers.

HCPs who currently use AI report benefits like improved efficiency and decision-making support, but they remain concerned about privacy and security (e.g., compliance with the Health Insurance Portability and Accountability Act [HIPAA], misuse of sensitive data), accuracy and reliability (e.g., incorrect information, bias), financial constraints (e.g., cost, return on investment [ROI]) and resistance to change. Without clear solutions to these issues, many are hesitant to adopt AI more broadly.

Key Findings (Continued From Previous Slide)

4

Alleviating providers' administrative burden is a key opportunity for AI in healthcare.

Despite efforts to streamline care, tech like electronic medical records (EMRs) and portals have added administrative burden, pulling HCPs away from patient care and contributing to burnout amid staffing shortages. Many see AI as a key solution to automate routine tasks, reduce admin time and enable more meaningful patient interactions.

5

There is a shared fear of an “AI crutch” rather than job replacement.

HCPs aren't worried about being replaced by AI but are concerned about overreliance. They fear it could erode critical thinking, foster blind trust in AI and weaken clinical skills without proper training and oversight.

6

HCPs are overwhelmingly optimistic about the future of AI in healthcare.

Despite current challenges, HCPs remain optimistic about AI's potential to boost efficiency and patient care. With proper support, they see opportunities in automation, diagnostics, post-surgical monitoring and at-home care tools.

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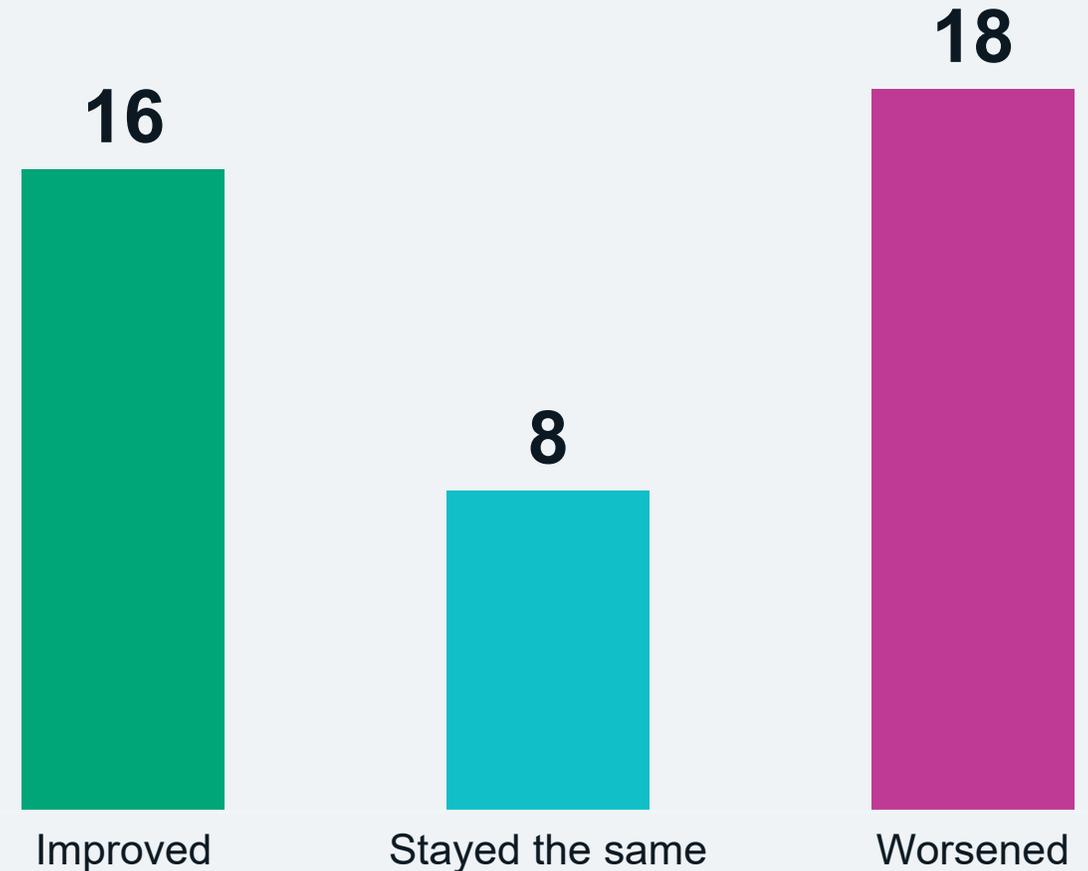
Current Outlook on Healthcare Industry



HCPs have mixed opinions on the current state of the healthcare industry

Providers' views varied widely on the state of the industry, as the next few slides demonstrate. In addition, several participants note there have been drastic improvements in some areas but notable worsening in others.

Outlook on Current Healthcare Industry Compared to Two Years Ago (# of HCPs)



Q. Compared to two years ago, do you feel the healthcare industry has...?; n=37
(Note: A few in-depth interview participants said both worsened and improved.)

Improved: Technology and AI have been the driving force behind improvements in the healthcare industry

 HCPs (particularly specialists) recognize the positive impact of technological improvements and AI on their ability to focus on patients and provide a higher level of care.

Areas of Improvement in Last Two Years

- **Improving Patient Care & Communication**
 - More accurate and efficient diagnostics
 - New tools for better treatment (e.g., robotics, virtual reality)
 - Increased communication and access to information
- **Increasing Process Efficiency**
 - Workflow automation, note-taking

“ Patient care is improving. There's navigation and **robotics** for **better accuracy and precision**. Radiation has gotten better protocols. There's medications that have come out. You have a lot of advantages with all of those developments and technologies. – **Emergency Surgeon**

Healthcare opportunities markedly improved. There's a sort of joke that no one should die from heart disease anymore [because of] things that can be done using **tools created by the pharmaceutical and device industries**. – **Specialist**

Communication between teams is smoother, and **technology plays a bigger role in helping us respond quickly**. AI tools have made things like navigation and early assessments **more accurate and less stressful**. – **Paramedic**

The emergence of **AI powered tools for note taking** has personally helped me be **more efficient**. – **Specialist**”

Q. Compared to two years ago, do you feel the healthcare industry has...?; n=16

Stayed the Same: Those who haven't actively experienced a difference in their day-to-day feel the industry is unchanged

 Residency students are more likely than other HCPs to say things haven't changed in the last two years, potentially due to their comparatively short tenure within the industry.

Reasons Unchanged in Last Two Years

- **Slow Pace of Change in Industry**
- **Persistent Tasks & Challenges**
- **Improvements Offset by Setbacks**

“ The health system in general **moves slow**. – **Residency Student**

Things have not changed much in my day-to-day work. **AI is slowly being integrated**. – **Specialist**

Although healthcare technology continues to improve, **our implementation of healthcare has remained far more stagnant than expected** in the post-COVID era. – **Residency Student**

While there have been some improvements such as electronic charting and easier ways to get things done, there are still procedures that must be done and all must be documented. **The documentation takes the most time and can be the most challenging especially when something is going to require legal involvement**. As far as helping patients it seems to be pretty much the same. – **Paramedic**

Q. Compared to two years ago, do you feel the healthcare industry has...?; n=8

Worsened: HCPs blame administrative tasks, staffing and the corporatization of medicine for the industry's decline



PCPs in particular feel the healthcare industry has worsened, saying the bureaucracy has made it increasingly difficult to effectively treat their patients.

Areas of Decline in Last Two Years

- **Increased Administrative & Bureaucratic Burden**
 - More documentation, paperwork, authorizations
 - Additional hurdles to seeing and treating patients
- **Staffing Shortages & Workforce Challenges**
 - Lack of available, qualified personnel
 - Higher patient loads, burnout and disillusionment
- **Corporate & Profit-Driven Pressure**
 - Growing influence of insurers and administrators
 - Less autonomy among clinicians
- **Barriers to Patient Access & Care**
 - Difficult to schedule appointments
 - Less personalized treatment or face time
- **Policy & Societal Issues**
 - Less respect for HCPs and their expertise

Q. Compared to two years ago, do you feel the healthcare industry has...?; n=18

“

After COVID, the industry (doctors, nurses, ancillary staff) became disillusioned. It seems like we have become pawns to insurance companies and [other] powerful companies. **It is distressing to have to spend so much time filling out paperwork then having my patients' medications and testing questioned over and over again. – PCP**

The administration has decreased staffing levels and made it challenging to care for patients while taking billions in profit. The crux of patient care is people, and the corporation and society isn't valuing the contributions of its workforce. **– Nurse**

With the corporatization of medicine, [the corporate entity] wants to make decisions and **it's more profit and monetarily driven than medical care**. That's a problem because they have a different agenda than I have. And there's only so much energy I have for myself, for my staff, to fight it. **– Non-Emergency Surgeon**

”

4

Challenges Currently Faced in Role



HCPs' biggest challenges are administrative tasks, which consume an excessive amount of their time

Biggest Challenges in Role



Documentation & Charting

- Documentation and notes, especially on EHR systems like Epic
- Described as tedious, repetitive, regularly completed after hours



Insurance Process

- Requirements like preapprovals, peer-to-peer, billing/coding, denials
- Described as demoralizing, obstructive, often extends after hours



Scheduling & Coordination

- Scheduling surgeries, appointments, coordinated care and staffing expertise to support needs
- Described as inefficient, ineffective, time-consuming



Managing Patient Communications

- Patient expectations for real-time communication coupled with requirements for HCP response time
- Described as overwhelming, unproductive, unrealistic

“

There's a lot more documentation that's more onerous. A lot of the doctors weren't trained in typing fast or rapidly or even dictating. – **Non-Emergency Surgeon**

Sometimes clinics do not have enough staffing to go through prior authorization requests or peer to peer calls insurance companies require for authorizing care. They dictate care some of the time and this sometimes makes care sub-par. – **Specialist**

Patients are expecting real-time access to physicians through patient portal messaging, which is unrealistic. These messages often have many questions and require long responses and patients are not sometimes willing to come into the office or do a televisit but rather want free access through the portal. At the same time, cuts to support staff have continued shifting the burden of answering these questions to physicians. – **Non-Emergency Surgeon**

”

The challenges HCPs face have a negative effect on their ability to deliver high-quality patient care

Implications of HCP Challenges



Reduced time for direct, meaningful patient interaction

“A disproportionate amount of my time is consumed by non-clinical responsibilities. These duties are essential but can be draining and reduce the time I am able to spend with each patient. – Residency Student



Delayed or suboptimal care, leading to poor patient outcomes

It is difficult to get tests or surgeries approved. I have a patient scheduled for knee replacement, but his insurance won't approve despite failing over a year of conservative modalities. They won't allow peer to peer until appeal has been evaluated, which can take 30 days. – Emergency Surgeon



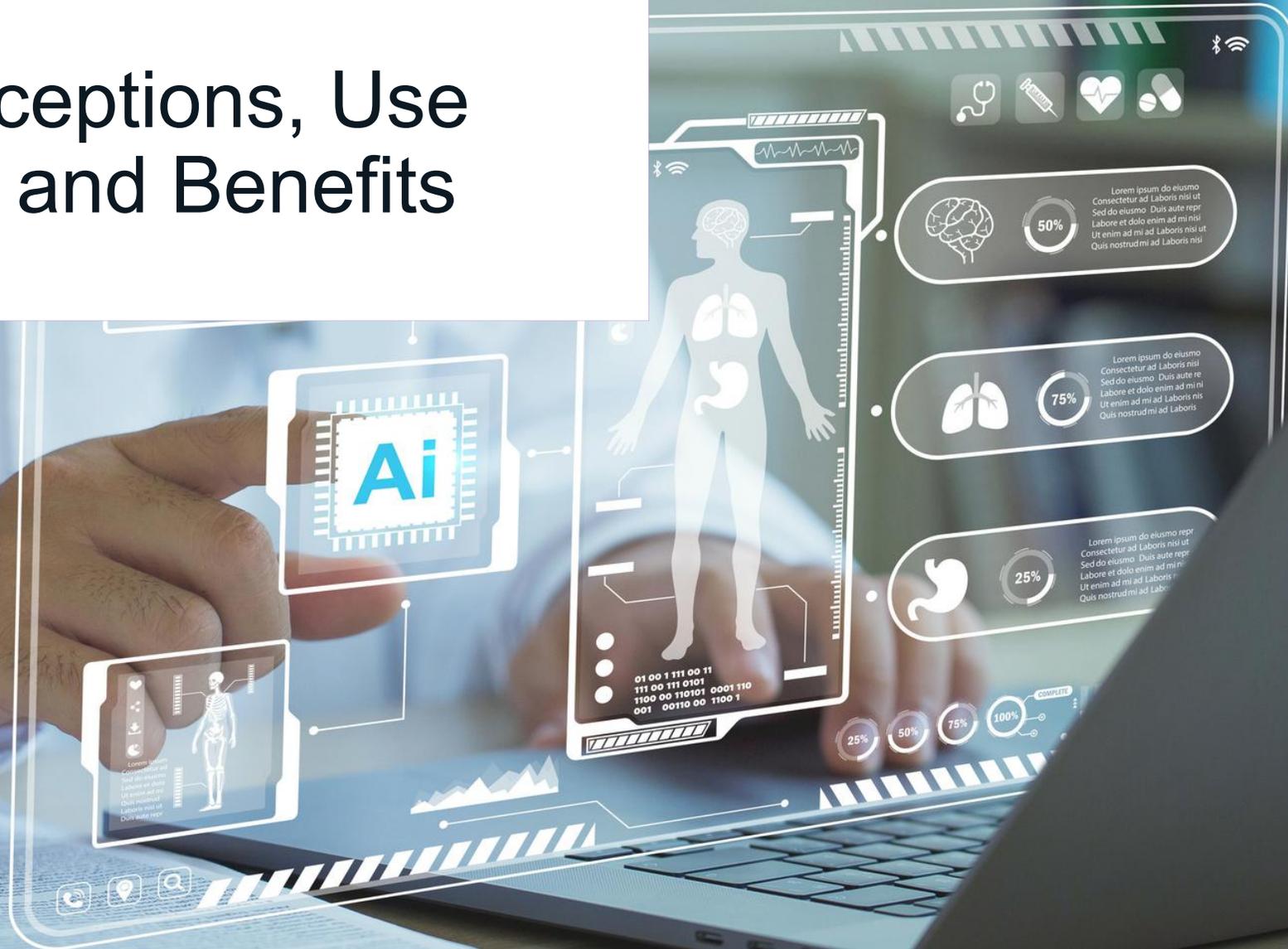
Provider burnout, exacerbating staffing shortages

Unsafe staffing remains the top reason nurses leave ... this leads to excessive workload, moral distress, and perception of inappropriate care, resulting in burnout and increased intent to leave. – Nurse

”

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AI Perceptions, Use Cases and Benefits



Most HCPs trust AI, but not without necessary caution; AI considerers are split on AI trust

Would Trust AI to Help Do Job (# of HCPs)

Yes

No/not sure



Total (n=37)



AI users (n=23)



AI considerers (n=14)



Q. In general, would you trust AI to help you do your job?; n=37; only two HCPs (one AI user and one AI considerer) entirely distrusted AI.

HCPs are cautiously optimistic of AI and remain hesitant until its value is proven in clinical settings

What Determines Trust in AI

- Trust in AI is mixed, influenced by specific use cases. **Higher trust is placed in data-driven tasks**, and **lower trust is placed on autonomous decision-making**.
- Most HCPs believe AI cannot replace human oversight, direct patient experience or provide adequate emotional intelligence, as **AI lacks the capacity for nuance and contextual understanding necessitated by certain tasks**.

Reasons for Distrust of AI

- Trust is undermined by concerns over **accuracy, transparency, privacy and dependency**.

What Would Increase Trust in AI

- Trust can be strengthened by AI systems that demonstrate **consistent performance** and provide **clear explanations** of their processes.
- While providers concur that AI cannot replace the hands-on nature of primary care or surgery, they can foresee **AI playing a more significant role with algorithmic tasks, including evaluation of radiology and pathology images**.

“

It depends on what AI is being used for and if it is correct or not. Is it actually telling us what's going on with the patient? – **Nurse**

Members of physician and nursing education associations **fear an AI crutch which can stunt critical thinking**. – **Residency Student**

I need statistics like how many other physicians are using [AI]. Did well known hospital systems, like Hopkins, Boston Children's, or Mass General, are these big hospital systems adopting AI? If they're using it, must be good. **It's sort of like a stamp of approval**. – **PCP**

”

Among the 23 (out of 37) HCPs who currently use AI in their roles, tools to support documentation are most used

How AI Is Currently Being Used



Documentation

- Transcribing patient interactions
- Coding and drafting clinical documentation
- Creating clinical notes
- Generating content for insurance approvals and appeals to claims, looking up prior claim authorizations

Diagnosis Support

- Generating potential diagnoses, especially for rare conditions
- Surfacing potential missed diagnoses
- Developing treatment plans
- Validating thought process
- Triageing patients

Analysis

- Assisting radiologists in analysis of X-rays, MRIs and scans
- Performing EMR integration to predict and alert about risks, patient triage decisions
- Flagging abnormal lab results, vitals or medication interactions

Administration

- Automating aspects of scheduling, billing and appointment reminders
- Managing medical equipment; tracking equipment maintenance needs (cleaning, contamination and calibration)

Patient Education

- Simplifying complex medical information into plain, culturally sensitive language for patients
- Generating educational content for chronic conditions
- Providing translation services to mitigate language barriers

Summarization

- Analyzing large volumes of medical literature
- Summarizing clinical trial data
- Keeping up with rapidly evolving fields of study (oncology, rare disease, genomics)

Note: Tasks are ordered by most commonly mentioned (on left) to least commonly mentioned (on right).

Specific AI tools most used among participants include ChatGPT and tools embedded in EMR systems

Specific Tools Used and How They Are Being Used

More Common

- **ChatGPT** (used for a variety of purposes, including documentation, summarization, diagnosis support and administrative tasks)
- **Epic** (EMR with integrated AI features, used for alerts, monitoring, risk scoring, data analysis)
- **Doximity GPT** (clinical templating, summarizing data and administrative tasks, particularly for physicians)
- **OpenEvidence** (quick clinical reasoning, treatment confirmation, diagnosis)

Somewhat Common

- **Aidoc** (radiology analysis to detect critical issues like brain bleeds or pulmonary embolisms)
- **Viz.ai** (radiology analysis to detect strokes, hemorrhages and occluded arteries; provides urgent alerts)
- **Ambient AI Scribe** (transcription, clinical documentation, code suggestions)
- **Abridge** (transcription, patient notes)

Less Common

- **Nuance DAX** (clinical dictation and transcription)
- **GI Genius** (for endoscopy to identify polyps and improve detection rates)
- **Google AI** (generating lists, answering questions, clinical brainstorming)
- **FirstNet Assist** (by AT&T, paramedic use for emergency response coordination)
- **Nuance Dragon** (transcription tool that integrates with clinical environments)
- **Heidi** (note summarization)
- **Copilot** (drafting clinical letters)

Additional mentions: **Eva** (EHR-integrated AI, use for prior authorizations and medication requests), **Gemini** (clinical queries and unusual diagnostic scenarios), **Perplexity** (clinical queries and education), **Mission** (transcription app integrated into Epic), **Timpani** (scheduling and productivity-based staffing in hospitals), **Leo** (translation)

HCPs often discuss how AI helps efficiency, streamlining and better care

Benefits of Using AI (Top Benefits Listed on Next Slide)



“

[AI is] definitely very positive because, **in minutes, you can get an answer to your question** that, back like 20 years ago, there were these huge textbooks. I haven't seen those books anywhere anymore. **I think AI is giving you a good feeling and a good solution if a patient is a surgical candidate or not.** – **Specialist**

[AI enables] **easier physician-to-physician communication.** We have to get in touch with people. Nowadays we can just use AI-based systems. It enhances the ability to contact other physicians and get a call back or your electronic response back. **It has made things more efficient.** – **Specialist**

[AI is] **helping with diagnostics and scheduling tests** so that we don't have a conflict. **Also, clinical data put in patient charts.** Years ago, it was written, and if somebody's writing a six, and they meant to write a three, then you have a mistake. **Also, patient dosing.** – **Nurse**

AI can automatically transcribe, structure, and summarize patient encounters turning conversations into clear medical notes. This not only saves time but also **reduces burnout,** **improves documentation quality** and gives us **more time face-to-face patients where we add most value.** – **Residency Student**

”

Top AI benefits include streamlining/efficiency, better patient care and outcomes, and enhanced decision-making

Benefits of Using AI

Streamlining; Efficiency



- Automating tasks (billing, scheduling, follow-ups, notes, reports, discharge and charting)
- Reduced documentation time; eliminating time-consuming manual work
- Simplifying workflows
- Improved communication and collaboration; easy access to information

Better Outcomes; Patient Care



- Accurate diagnosis
- Early detection, alerts and intervention for critical care needs; continuous monitoring
- Freeing time for patient care; meaningful interactions
- Creating tailored care programs
- More patient self-service options; education tools

Support for Decision-Making

- Instant access to information; simplified literature reviews
- Confidence from data-driven decisions
- Faster imaging and scan analysis
- Alerts on staffing (including resource shortages)

Reduced Workload; Employee Burden



- Automating mundane work tasks to focus on higher value ones (patient care)
- Reducing workload to mitigate exhaustion/feeling overworked

Cost Reduction; Reduced Waste

- Optimized billing
- Reducing staff
- More accurate estimation of staffing and resource needs

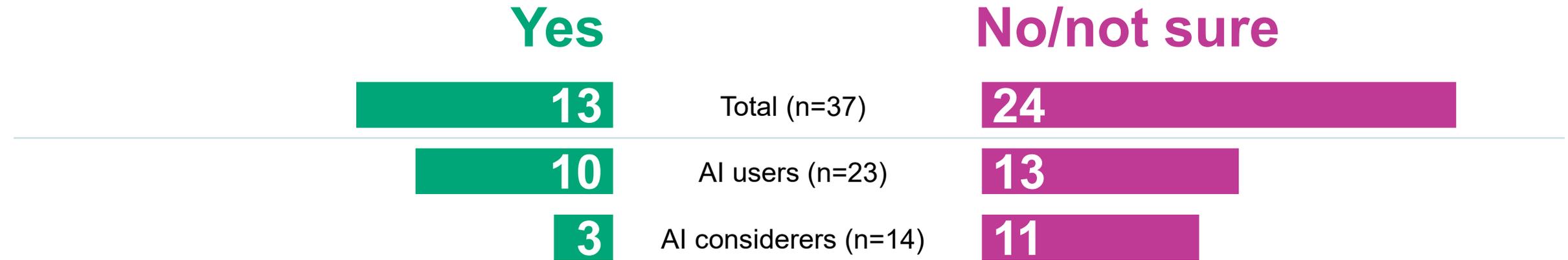
Easy to Scale Up; Highly Adaptable

- Flexible and customizable tools; adapts well to specific healthcare environments, processes, instructions
- Scalable; can evolve to address future needs and advancements

Note: Benefits are ordered by most commonly mentioned (on left) to least commonly mentioned (on right);  indicates top benefit for considerers

Most HCPs are not recommending AI to patients; those who use AI in their role are more likely to recommend it

Recommend Patients Use AI Tools (# of HCPs)



Tools HCPs Have Recommended

- **Generative AI search tools** have been recommended for developing meal/exercise plans and assessing the indication of vitals.
- **Specific medical tools and systems** include the practice's portal with patient communication and education tools, stoma output trackers and an app for spinal cord stimulation surgeries.
- **Health trackers enabled by AI**, particularly wearable trackers like smartwatches, have been recommended to record patients' vitals and track ongoing health issues.
- **Symptom checkers** were noted by a few participants.

Q. Do you currently recommend AI-powered tools to your patients? Which tools and for what purposes?; n=37

When it comes to recommending AI to their patients, some believe AI can provide more accessible and efficient care

Perceived Benefits of Recommending AI to Patients (Continued on Next Slide)



Convenience and Accessibility

Many HCPs highlight the benefit of AI tools offering virtual care at any time, giving patients faster access to healthcare guidance. A few noted that this could reduce unnecessary clinic or emergency room (ER) visits.

“

AI could give direction to patients given their complaints to either seek emergency care or whether something could be handled electively. This would take a lot of burden off the ER.
– **Non-Emergency Surgeon**



Efficiency in Care

AI tools that triage symptoms or help patients describe their conditions can improve provider-patient communications and streamline visits for more efficient care. AI can also help streamline the follow-up process.

I've recommended AI tools to a few patients, mainly for checking symptoms when they're unsure. – **Paramedic**



Patient Education and Empowerment

AI tools can help patients have a more active role in managing their health through symptom and vital trackers, educational resources and monitoring.

I have suggested AI tools to our patients who want to keep better track of their health. I have suggested AI to help create better meal plans and exercise plans as well. – **Paramedic**

”

HCPs also perceive AI as empowering patients dealing with chronic conditions or mental health concerns

Perceived Benefits of Recommending AI to Patients (Continued From Previous Slide)



Chronic Condition Management

HCPs specifically mention condition management for chronic conditions like diabetes, asthma and hypertension.



Mental Health Management

Some participants noted the benefit of AI providing more accessible mental health care and evaluation.

“

I have recommended ChatGPT for patients with hypertension that have a journal of daily blood pressure measures, so **in order for them to know when to come to an urgent facility, they can check with [the] AI tool to explain to them if the value is in [the] normal range.**

– Residency Student

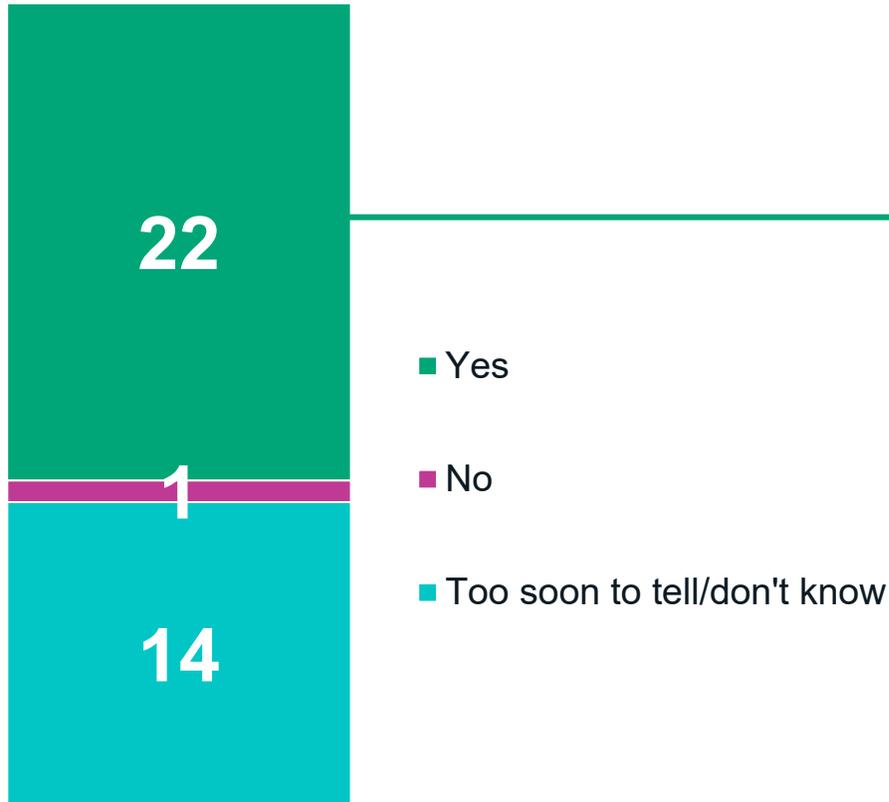
I saw some interesting studies on counseling where **AI was compared to just a regular counselor and the patients felt like they got pretty good care.** ... For behavior change, for counseling, for anxiety, I think it's probably got a big role there. **– PCP**

”

Most HCPs have already seen or expect AI to deliver some form of ROI for their organization

AI Has Generated/Can Generate a Positive ROI

(# of HCPs; among those currently using and considering)



- Yes
- No
- Too soon to tell/don't know

How Has or Can AI Generate(d) Positive ROI?

Users cite positive ROI in the form of time savings, increased workflow efficiency, improved staff and patient satisfaction, reduced administrative burden and the ability to see more patients.

Considerers believe AI tools could generate positive ROI by automating repetitive tasks, reducing documentation time, improving efficiency and providing more time to focus on patient care.

“

I'm just able to do my work faster. I get out of work at the end of the day sooner. I don't like to leave past the end of hours working. I want to get out of here and go home to my family. I don't want to be doing work at home. – **PCP**

AI's beginning to show improved efficiency of prior authorizations and dealing with insurance companies, which is an ever-continuing task. Far too much energy is being spent on it. This is helping to reduce that aggravation and the obstacle. – **Non-Emergency Surgeon**

”

Q (Users). In your experience, are the AI-powered tools or technologies you're using in the workplace generating a positive return on investment for your organization? How so?; n=23

Q (Considerers). Could AI-powered tools or technologies in the workplace generate a positive return on investment for your organization? How so?; n=14

6

AI Challenges



Most healthcare organizations lack comprehensive AI training and strategy, which exacerbates HCP burden

The lack of structure is creating uncertainty and unease about ethical use as well as confusion about when it's appropriate, especially when sensitive information is involved.

Organizational Training and Strategy for AI

Training and Guidance

- **Almost all HCPs say they have NOT received formal training or guidance** about how to use AI for operations and patient care.
- Many say they are **self-taught or relying on their peers or friends for guidance**. Some have received training through brief sales demonstrations, but it has been largely ad hoc.

Strategy and Governance

- There is almost no mention of formal policies, **ethical frameworks or overarching strategies** for implementing AI.
- Organizations are in the early stages, **limiting AI use to certain areas versus wide-scale rollouts** and **lacking one set of goals or policies** about when and how to appropriately use AI.

“

I think we need some basic guidelines on where you can use and in what areas. I think you must draw a line in terms of usage. I don't think it's appropriate in some places. – PCP

Nothing formally [training], only through my friends, and my two sons-in-law. This is the farthest thing from medical school training. There was nothing like this five years ago. So, all this is on the job training, and learning on the run. – Non-Emergency Surgeon

I haven't used it [Ambient AI system]. My division is really waiting to use it because we've seen the notes that it produces. The plan is to implement it, but it's a rollout. It's being rolled out first among our primary care providers. Then it's moving to the specialists. – Emergency Surgeon

”

HCPs have concerns about using AI when it comes to privacy, accuracy, training and diminished critical thinking

Barriers to Using AI (Top Barriers Listed on Next Slide)



“

The privacy issue is going to be the biggest [barrier]. I know compliance is all over it. Trying to figure out what we can, what we can't do and how protected information is. Cost and compliance are the two big barriers. – **Emergency Surgeon**

The challenges I face with AI are related to privacy concerns, so I have to be very careful to reword or anonymize information. Also, it may be inaccurate in rare or nuanced conditions. I would recommend a [HIPAA-]compliant integration so we can use documentation safely. – **Residency Student**

Is [what AI produces] really true? Sometimes when I ask a question or if I'm doing an exam or something and I Google it, I have noticed that AI comes up with an incorrect answer. I feel like people would be skeptical a little bit of that. – **Nurse**

Our shifts are nonstop, and testing out a new tool often feels like just another task we don't have room for. There's also this worry that we'll end up relying too much on AI and forget to trust our training or instincts. – **Paramedic**

”

The top barriers to using AI are related to data privacy, accuracy, financial constraints and adoption resistance

Barriers to Using AI

Privacy and Security Concerns



- HIPAA compliance
- Misuse or mismanagement of sensitive data
- Anxiety about storage and access to patient recordings, notes, transcriptions
- Presents new cybersecurity requirements

Accuracy, Reliability and Potential Bias

- Receiving incorrect information, wrong diagnosis, etc.
- User bias/error, limited transparency, unclear how data is trained
- Generates excessive and/or false alerts that must be monitored and addressed
- Inconsistent quality across AI tools
- Results need verification

Financial Constraints; "Red Tape"



- High cost associated with implementing and maintaining AI tools
- Adds more strain to existing budgets
- Need to justify the costs and understand the ROI
- Slow to adopt, especially in larger or public systems

Resistance; Learning Curve; Knowledge



- Low knowledge
- Distrust; skepticism
- Becoming overly reliant on AI
- Losing the "human touch" aspects of care
- Generational resistance
- More time to acclimate and learn new tools
- Spend more time on validation of AI results

Ethical and Legal Considerations

- Tools are not fully regulated
- No formal training in place or code of ethics and guidelines for use
- Questions about how AI decisions will be regulated or certified
- Need clearer patient consent protocols

Poor Performance; Not Specific Enough

- Lack of integration with (legacy) systems or standalone solutions
- Doesn't provide useful or insightful recommendations
- "Cookie cutter"; not specific enough

Note: Barriers are ordered by most commonly mentioned (on left) to least commonly mentioned (on right);  indicates top barrier for considerers

HCPs are hesitant to use AI for nuanced patient-specific contexts, ethical decision-making or high-stakes diagnoses

Many HCPs feel AI lacks the capacity for these types of tasks. For this reason, **there are certain tasks that should not be left for AI to solely complete without human oversight.**

Tasks Least Suited for Sole AI Use

Final Decisions Providers do not trust AI to make final decisions on diagnostics or treatments without human review. Additionally, AI alone cannot perform surgeries or medical procedures, though HCPs see it as helpful in assisting during the process.

Personalized Patient Care & Ethics AI is inappropriate for tasks requiring emotional intelligence, tailored care plans and ethical decisions requiring nuanced reasoning, HCPs say.

High-Stakes or Complex Tasks Providers distrust AI with complex diagnostics, high-risk procedures and emergency care, where errors could have severe consequences and real-time adaptability is required.

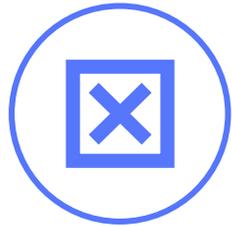
“It's still going to be me making the final decision. ... I think maybe 60%-70% of the time, I will agree with AI, but there will be a [chance] where I'll say no because **there are certain nuances that it's very difficult even for us to take into consideration.** – **Specialist**

During rapid response situations, I need immediate, instinctive decision-making based on my years of training. I'd also avoid AI tools for rare conditions or complex presentations that might not be in AI's data. **End-of-life care discussions are another area where AI has no place;** families need human compassion. – **Nurse**

”

Many HCPs worry about recommending AI tools to patients, suggesting that AI tools need more validation and evidence

Challenges Within AI Tools That Prevent HCPs From Recommending to Patients (Continued on Next Slide)



Inaccurate Information and Misdiagnoses

Most HCPs have concerns about AI pulling from unknown sources and providing patients with inaccurate information.



Lack of Personalization or Nuanced Care

AI tools often put out more generalized answers to the information they are provided, failing to account for individual patients' circumstances, health complexities and rare conditions.



Increased Anxiety or Confusion

Patients' lack of medical expertise could make information provided by AI tools seem overwhelming or alarming, leading to confusion or anxiety.

“

I will not recommend anything to patients until I see proof of its value. **Medical AI in the hands of non-medical professionals is extremely dangerous and can lead to misdiagnosis, inappropriate treatment, or at the very least anxiety that shouldn't have been provoked.** – **Non-Emergency Surgeon**

The challenge is that these technology tools often lack the context of the patient's current critical condition. What might be good advice for a healthy person at home could be completely inappropriate for someone on life support in the ICU. – **Nurse**

I feel like **AI could potentially interfere with care by providing possibly too much information to the patient.** Too much information can lead to other mental health problems down the road. – **Nurse**

”

HCPs also have concerns recommending AI tools to patients due to privacy and patient overreliance on AI tools

Challenges Within AI Tools That Prevent HCPs From Recommending to Patients (Continued From Previous Slide)



Undermined Doctor- Patient Relationship

Some HCPs fear patients will become too reliant on AI tools, bypass professional medical advice and lose trust in providers.



Privacy Concerns

HCPs are concerned about the data security of entering and storing sensitive health information in AI tools, especially since tools available to patients may not have strict privacy regulations.

“

Sometimes I've had patients that have dismissed their symptoms when it was very important to go to emergency department. **The worst thing is having patients diagnosing themselves and using any medication that was recommended by AI.**

– Residency Student

Privacy concerns are huge – I wouldn't want patients using AI health apps that might not have the same strict HIPAA protections as our hospital systems, potentially exposing their sensitive medical information. **– Nurse**

”

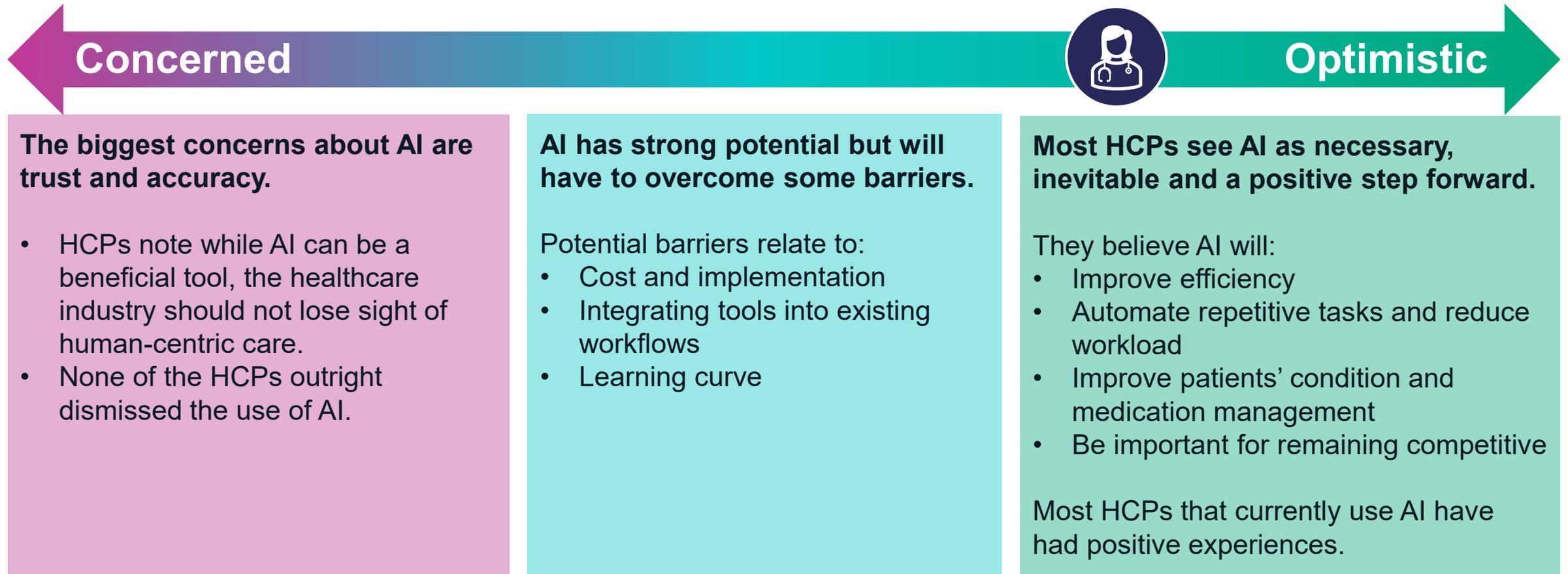
7

Future Outlook



HCPs lean more optimistic about AI's future potential, despite concerns about implementation and overreliance

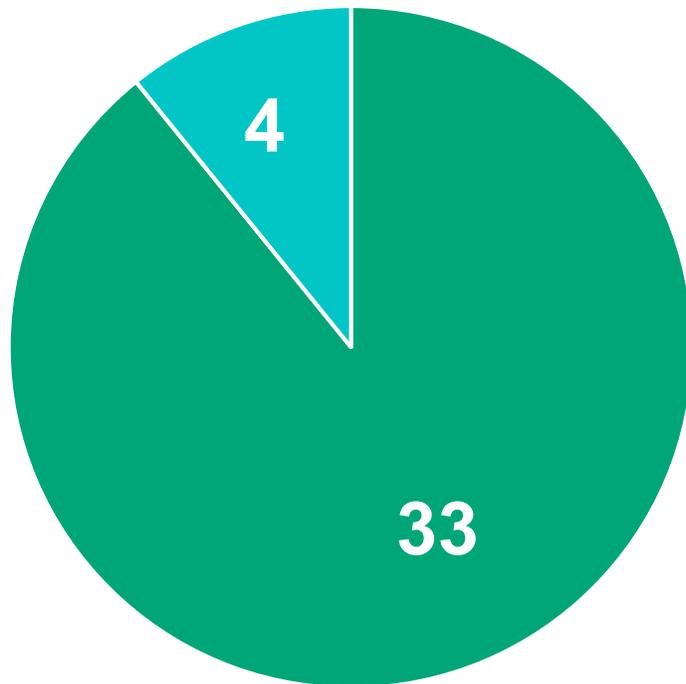
HCP Outlook in Implementing New AI Tools



HCPs overwhelmingly believe AI will improve the healthcare industry; none believe it will worsen it

Anticipated Impact of AI on Industry in Next Two Years (# of HCPs)

- AI will have improved the industry
- AI will have worsened the industry
- No change



“

AI is going to improve the healthcare landscape by **making things more efficient, especially for diagnosis and administrative tasks.** – **PCP**

AI will improve healthcare by **taking over menial tasks and allowing healthcare workers more time to focus on patients.** – **Nurse**

AI will have a **positive impact in improving diagnostic accuracy and improving efficiency of care** especially for primary care/emergency room providers who need to see a wide variety of ailments but do not have the expertise to quickly diagnose. – **Non-Emergency Surgeon**

I think it'll take longer than two years to see any real, game-changing impact from AI. **Adoption is slow, and the focus right now is on small-scale pilots.** – **Emergency Surgeon**

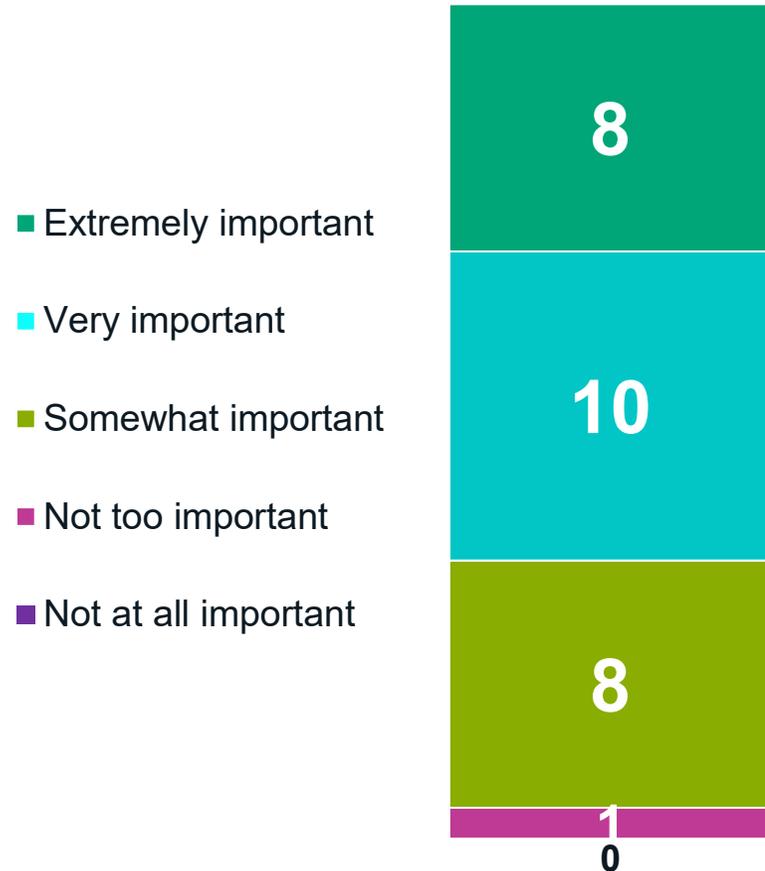
”

Q. In two years, do you anticipate AI-powered tools and technology will have improved, worsened and not changed the healthcare landscape?; n=37

Nearly all say it is at least somewhat important their organization commits to using AI tools

Importance of Organization Committing to Using New AI Tools (# of HCPs)

(among ethnography participants)



“

AI is improving workflow for every single industry, including medicine. And I would want to have all of those tools available to me so I can focus on what really matters. – **Specialist**

AI has the potential to improve both the quality of patient care and the efficiency of clinical workflows. As a physician, I face growing demands, and AI can help by reducing the burden so we can focus more on direct patient care. – **Residency Student**

It's somewhat important because I know technology is evolving. I just don't want it to be the main focus that we have to lean on to get answers. – **Nurse**

My hospital organization needs to implement AI systems in the coming years to remain competitive and provide the best possible patient care. – **Nurse**

”

Q. How important is it to you that your organization is committed to using new AI tools to support your work in the future?; n=27

Hard evidence on positive outcomes, patient safety and quality of care will make a strong case for AI adoption

What Proof Points & Evidence Are Needed for AI Tools?

All participants agree it is *critical* to prove that AI is making things better in healthcare.

There is a fundamental need for evidence and data to make a strong business case for AI.

More Important

Patient outcomes: Better disease management, higher quality of life, overall health improvements, accelerated diagnosis, quicker treatments

Patient safety and quality of care: Better prevention, medication safety, fewer documentation errors, adherence to protocols, consistency in approaches

Gained efficiency: Length of stay, number of visits/readmissions, shorter stays, seeing more patients

Patient experience: Increase in interaction, higher patient satisfaction scores, better education, reduced wait times, increased access to care and information

Staff satisfaction: Reduced burnout, time saved, lower administrative burden, reduction in manual tasks

Revenue and cost reduction: Financial impact, including increased revenue, cost reductions

Security and compliance: Address privacy, security and regulatory requirements transparently

Endorsements and testimonials: Peer recommendations, endorsements, peer-reviewed studies, published outcomes, being honest about pros and cons

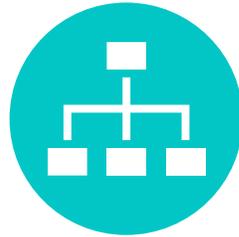
HCPs see opportunity for AI to improve administrative tasks, diagnostics and patient empowerment

Top AI Opportunities in the Future

- Tools for HCPs
- Tools for patients



**Automated
Documentation
and Notetaking**



**Streamlined
Administrative
Tasks and Patient
Communication**



**Enhanced
Diagnostics and
Clinical Decision
Support**



**Surgical Support
and Monitoring**



**Integrated Patient
Information and
Charts**



**Disease
Management**



**Medication
Tracking and
Management**



Patient Education



**At-Home Care
Opportunities**

If AI automates authorizations, summaries, planning and follow-up messages, HCPs can prioritize patient interaction

Top AI Opportunities in the Future for HCPs (Continued on Next Slide)

Automated Documentation and Notetaking

- AI scribe or voice-to-text that automates notes and summarizes visit

Streamlined Administrative Tasks and Patient Communication

- Personalized responses to portal messages and patient questions
- Automated patient scheduling
- Multilingual tools
- Autonomous triage agents that assess symptoms and determine care route
- AI that automates prior authorizations, insurance paperwork, medication approvals, etc., to prevent rejections

Enhanced Diagnostics and Clinical Decision Support

- AI tools that provide early detection of strokes, bleeds and sepsis
- AI tools that analyze health data to identify at-risk patients, risk of readmission, adverse events and emerging public health crises

“

By the end of the visit, the AI tool will document the encounter with billing, prescriptions for me to approve and send, and any tasks that need to be finished. This would help efficiency and improve patient care.
– Residency Student

[It would be ideal] if AI could identify accurately all the screening immunizations and follow up tests, e.g. repeat x-ray or MRI follow up scans which were not done or overdue. – Specialist

”

HCPs also desire ways for AI to support them in surgeries and patient journeys

Top AI Opportunities in the Future for HCPs (Continued from Previous Slide)

Surgical Support and Monitoring

- AI systems that analyze imaging data and plan complex surgeries
- AI that provides real-time anatomical identification and surgical guidance

Integrated Patient Information and Charts

- AI tools that aggregate patient information from multiple sources, including wearable trackers, across their care journey and provide pre-visit patient summaries and personalized treatment plans

“ I’ve seen some interesting early videos of **anatomic identification during surgery in real time using AI** ... there could be a significant role for this going forward for identification of critical structures during surgery.

– **Non-Emergency Surgeon**

If AI could follow a patient through their entire journey, keeping all the teams updated, we’d avoid so many errors and miscommunications.

– **Specialist**

”

HCPs can envision how AI could support patients in self-managing health conditions

Top AI Opportunities in the Future for Patients

- | | |
|---|---|
| Disease Management | <ul style="list-style-type: none">• Diabetes (e.g., glucose tracking), asthma, hypertension, heart failure, post-surgical care monitoring• Wearable devices tracking vitals and monitoring for complications• AI-powered implanted devices tracking patient pain and adjusting spinal cord stimulation automatically• Stoma care, musculoskeletal triage |
| Medication Tracking and Management | <ul style="list-style-type: none">• AI-powered reminders, dosing, drug interactions, FAQs |
| Patient Education | <ul style="list-style-type: none">• AI chatbots to assess symptoms, answer routine questions and recommend next steps |
| At-Home Care Opportunities | <ul style="list-style-type: none">• Virtual therapists, guided cognitive behavioral therapy tools• Remote AI-guided physical therapy sessions with real-time feedback |

“

Virtual Doctor who explains diagnostic results to patients that they can access and adapt to their needs. This would facilitate patient education while minimizing time commitment from the physician. – **Non-Emergency Surgeon**

Smart Medication Optimization AI that continuously analyzes each patient's response to drugs and suggests real-time dosage adjustments based on kidney function, drug interactions, and therapeutic goals. – **Nurse**

”



8

Recommendations



Recommendations (Continued on Next Slide)

1

Prioritize AI solutions that reduce providers' administrative burden.

HCPs spend nearly 28 hours a week (per secondary research) on administrative tasks, with documentation, insurance, scheduling and patient communications as top pain points. AI should focus on easing these burdens to improve efficiency and free up time for direct patient care.

2

Establish comprehensive training and clear governance around AI.

AI adoption remains early-stage, with most HCPs receiving little guidance and left to navigate its use on their own — leading to uncertainty, especially around privacy. To build trust and responsible adoption, the industry should consider:

- Developing structured training programs and protocols on using AI-powered tools
- Implementing organizational guidelines and ethical frameworks that outline when and how to appropriately use AI at work
- Providing assurances around accuracy, reliability, data privacy and security (including clarity around any legal implications of AI-powered tools and associated sensitive patient data)

Recommendations (Continued from Previous Slide)

3

Address barriers to AI adoption by highlighting its value.

HCPs see both barriers and promise in AI. Demonstrating ROI through clear metrics — like efficiency, cost savings and improved patient outcomes — can help ease concerns and drive adoption.

4

Position AI as a tool to support humans (rather than outright replacing them).

HCPs and patients worry about overreliance on AI. Human review is essential — especially for emotionally complex or high-stakes tasks. AI should support, not replace, provider expertise.

5

Ensure patient-facing AI tools have been rigorously tested for accuracy and reliability.

Most HCPs are positive about AI but hesitant to recommend patient-facing tools due to concerns about accuracy and impact on doctor-patient relationships. Such tools should be rigorously tested and validated before rollout.

9

Appendix



Total Sample Breakout

AI USE



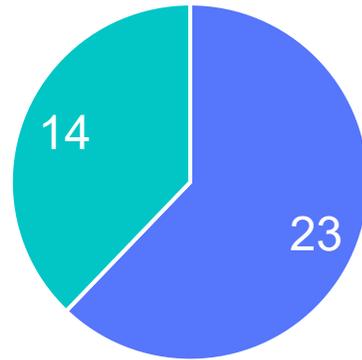
User
(n=23)



Considerer
(n=14)

AI FAMILIARITY

- Very familiar
- Somewhat familiar



AI USE IN EMPLOYMENT

Yes, and I personally use it	n=23
Yes, but I don't personally use it	n=5
No	n=8
Not sure	n=1

INVOLVEMENT IN AI DECISIONS



POSITION

Nurse	n=7
Primary care practitioner	n=5
Specialist	n=6
Paramedic	n=5
Emergency surgeon	n=3
Non-emergency surgeon	n=7
Residency student	n=4

SETTING TYPE



AI USE IN EMPLOYMENT

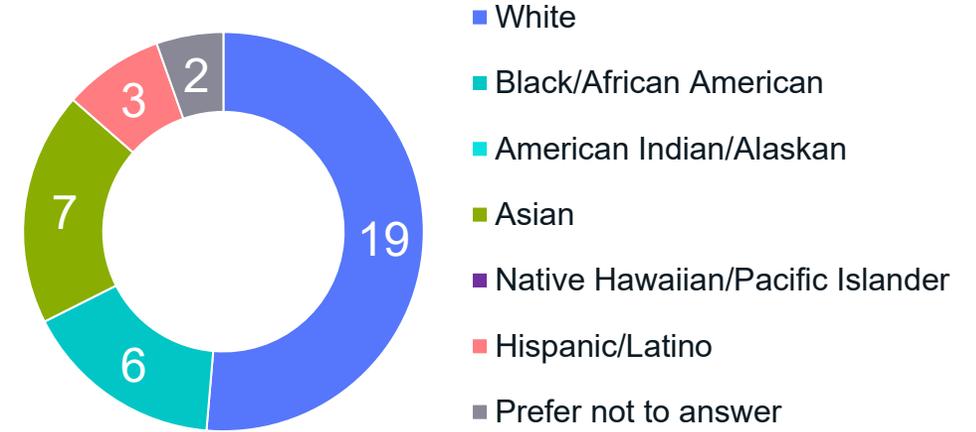
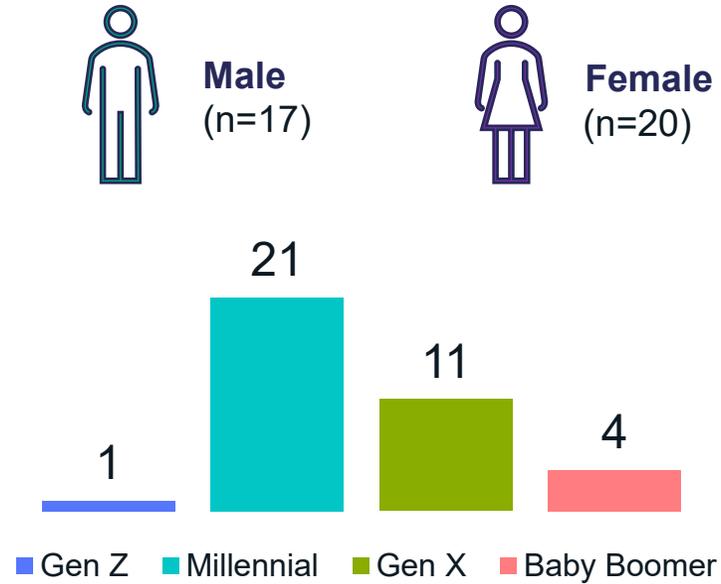


NUMBER OF EMPLOYEES

Less than 10	n=3
10 to 99	n=5
100 to 999	n=3
1000 to 1499	n=5
1500 to 4999	n=5
5,000+	n=16

Total Sample Breakout (Continued)

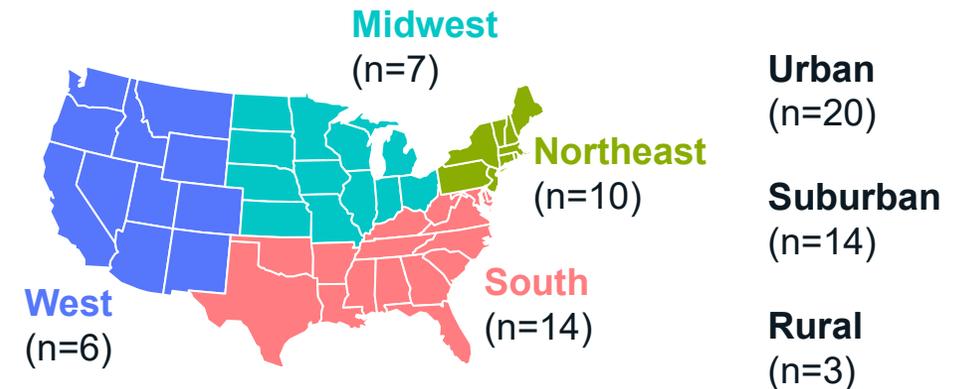
GENDER AND GENERATION



EDUCATION



REGION AND AREA TYPE



10

Additional CTA Resources



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CTA quantifies the size and momentum of the industry through a variety of reports, tracking sales volume and revenues for hundreds of tech products. Our reports include one- and five-year forecasts and monthly forecast reports for select hardware categories. For more information, contact CTA research: research@CTA.tech.



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The Future of Women's Digital Health Solutions



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1

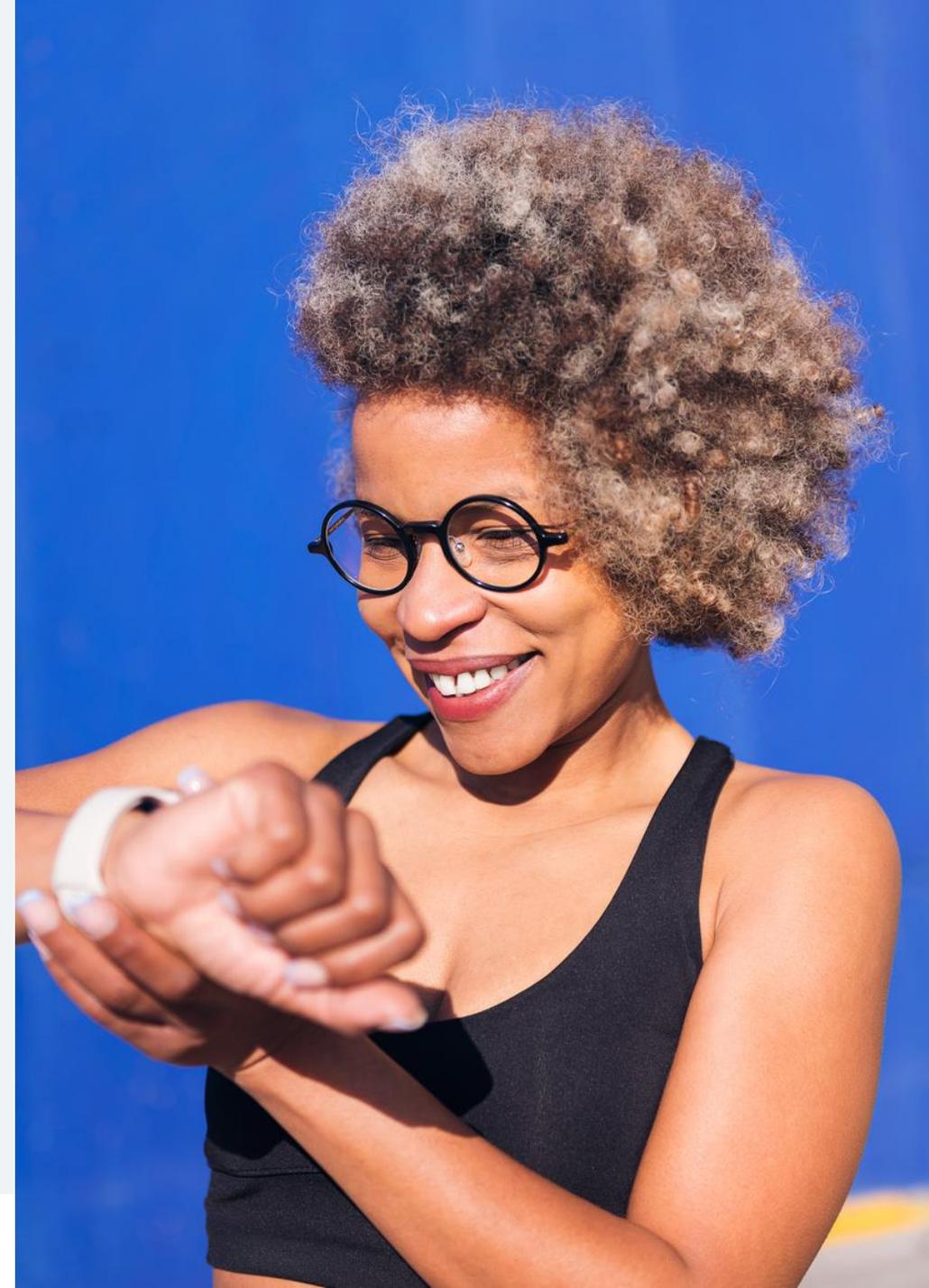
Objectives & Methodology



Research Objectives

This study aimed to explore the future of women's consumer digital health solutions, understand what drives women to adopt and use them for health management, and inform new features and products.

- Objective 1** Understand the market's perceptions of women's health
- Objective 2** Measure awareness, usage and perceptions of women's digital health solutions
- Objective 3** Assess the importance, higher-order needs (emotions and values) fulfilled and value of women's health solutions
- Objective 4** Identify the barriers to adopting women's health solutions
- Objective 5** Identify future opportunities for digital health solutions
- Objective 6** Compare demographics between users and non-users of digital health solutions



Methodology

CTA's "The Future of Women's Digital Health Solutions" was administered as an online survey among 1001 U.S. adults (aged 18-plus) who were assigned female at birth and identify as female — to be further refined into Current Users, Previous Users, and Non-Users. The survey was fielded from August 16 to 28, 2023.

The margin of sampling error at 95% confidence for aggregate results is +/-2.9%. Sampling error is larger for subgroups of the data. As with any survey, sampling error is only one source of possible error. Precautionary steps were taken in all phases of the survey design and the collection and processing of the data to minimize its influence because non-sampling errors cannot be accurately calculated.

CTA designed this study in its entirety and is responsible for all content contained in this report. CTA is a member of the Insights Association (IA) and adheres to the research and analysis guidelines set forth in the MRA Code of Marketing Research Standards and CASRO Code of Standards and Ethics.

Definition of key analysis groups:

Digital Health Solution Current Users: Those who have used at least one digital health solution within the last three months.

Digital Health Solution Previous Users: Those who have previously used at least one digital health solution but have not used any within the last three months.

Digital Health Solution Non-Users: Those who have never used a digital health solution.



2

Key Findings & Recommendations

Key Findings



Women's Health Care Perceptions

- **The meaning of “women’s health” varies from woman to woman.** While a little over a quarter (27%) have a narrow view focused on the health areas and anatomy that are unique to menstrual and reproductive health, others (73%) have a much broader view that includes physical, mental, social, emotional, sexual and spiritual aspects.
- **Three-quarters (75%) of women face challenges in obtaining health care.** The most common concerns include high health care costs (38%), needing to prioritize health (25%), limited appointment availability/office hours (23%) and access to affordable health insurance (21%).
- **Women turn to a variety of sources for health information,** with primary care doctors being the most common (78%). Web searches (53%) and family/friends (44%) are also popular sources used to obtain health information. Preferred sources of information vary by generation.

Key Findings (Continued)



Women's Digital Health Solution Awareness and Usage

- **Familiarity with and usage of digital health solutions differs by health area.** Women are most familiar with fitness (59%), nutrition (47%), mental health (45%) and menstrual health (43%) digital solutions. Usage of these solutions is greatest for fitness, with 48% of current and previous users having ever used digital health solutions for this area.
- **Market potential (usage + interest) for digital health solutions is strong.** Solutions with the greatest potential are in the areas of fitness (78% are currently using or are interested in using), nutrition (77%), menstrual health (73%) and mental/emotional/cognitive health (72%). Usage of digital solutions is low in most other health areas, but interest is strong, indicating that women would benefit from additional information about the options available to them and the benefits of using digital health solutions.
- **Health apps (73%) are the most popular type of solution used among current users, followed by telehealth (40%) and smartwatches (38%).** There is growth potential in these areas, as well as for in-home testing/diagnostics linked to a health app, with more than half of women currently using or interested in using these technologies.

Key Findings (Continued)



Drivers for Adoption and Concerns

- **Cost leads as the top consideration for digital health solution adoption.** Its indexed importance score is 229 compared to the average importance of 100. Accuracy (200) and insurance coverage/reimbursement (192) are also highly important.
- **Most women who have used digital health solutions have had a positive experience** (72% satisfied on average) and think these solutions have provided helpful insights and made them feel more empowered in managing their health. Still, many current users and non-users have concerns, including cost, security, lack of personalization and accuracy.
- **Most women (76%) have only used free digital health solutions.** However, 30% would be willing to budget for out-of-pocket expenses for digital health solutions, for an average ranging between \$119-\$215 spent during a 12-month period.

Recommendations

1

Address the top challenges women face in receiving health care, and highlight how digital health solutions can help

Top challenges women face are cost, needing to prioritize health, limited appointment availability and access to affordable health insurance options. Emphasis should be on how digital health solutions can help cut costs on nonurgent in-person care and provide flexibility in women's schedules.

In addition, if digital health solutions require a fee, ensure that it is ***budget-friendly or can be accepted by insurance providers*** – a low-cost digital health solution that allows women to save money and feel secure and fiscally responsible has value that resonates among many women.

2

Identify characteristics of each user type, and market digital health solutions tailored to each of these types

Current users tend to be younger, have a higher income and have more education. They also tend to be more familiar and satisfied with different types of digital health solutions. They could be enlisted as influencers to encourage usage.

Previous users may be skeptical about starting to use digital health solutions again. They require more education on the benefits these solutions provide and ways to measure the solutions' impact on their life.

Non-users will need reassurance and education. Low cost and/or free trials might be necessary to gain trust and loyalty.

3

Emphasize the future of digital health technologies geared toward women

Two in three women (66%) believe digital health solutions are the future of health care, and many women believe that digital health solutions will aim to bridge gaps in health equity. As artificial intelligence (AI) becomes more advanced, more than half of women believe that increased AI will have a positive impact on access to care; diagnosis and treatment; precision medicine and genetics; and affordability of care.

While women's health technology companies should emphasize this exciting future of health care, they also need to take necessary precautions with data privacy and biases, as at least 1 in 6 women believe these areas could be negatively impacted by AI.



3

Market Landscape

The market for women's digital health solutions has seen significant growth in recent years that is likely to continue

Sizing the Market* The industry will be worth an estimated [\\$1.186 trillion by 2027](#), according to forecasts by the non-profit organization FemTech Focus.¹

The Industry Is Growing...

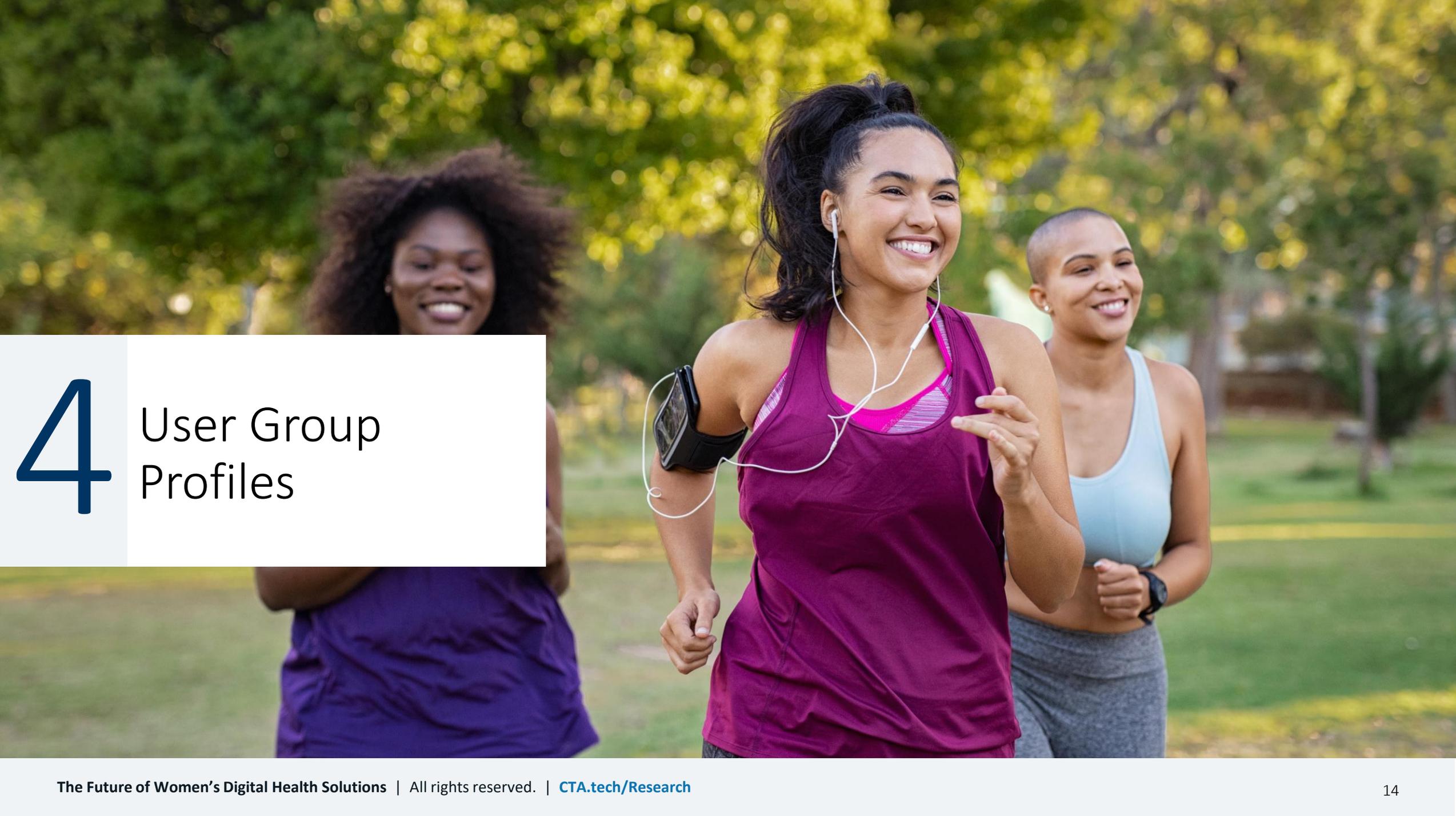
- Venture capitalists invested just \$143 million in women's healthcare in 2006. That number had grown to \$1.9 billion by 2022.²
- Within the past five years, more than 60% of women's health technology startups were founded. In addition, "there has been a 1,000% increase in the number of businesses in the space over the last 10 years, according to FemHealth Insights research."³

...But There Are Still Hurdles to Face

- While the market for digital health solutions is set to grow, the share of that market dedicated to women's digital health is just a fragment. In 2021, the funding for all digital health solutions was \$29.3 billion, with women's digital health comprising just \$1.1 billion of that.⁴
- While women make up more than 50% of the population, their unique health needs have received little attention. Only 1% of health care research "is invested in female-specific conditions beyond oncology."⁵

1 CNBC, 2023; 2 Forbes, 2023; 3 CNBC, 2023; 4 Axios, 2023; 5 Forbes, 2023

* Please note that this slide is based on secondary data.

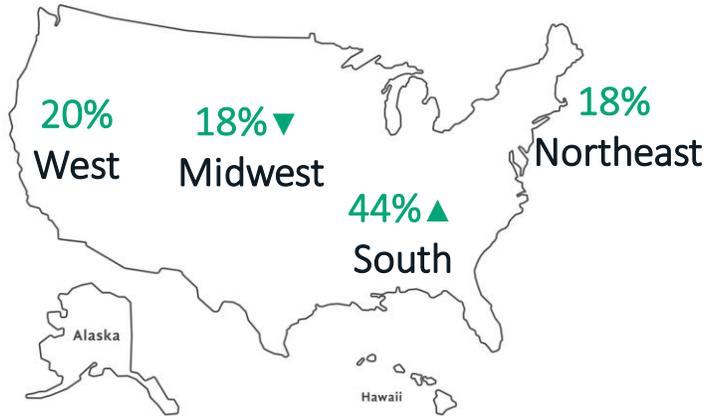


4 User Group Profiles

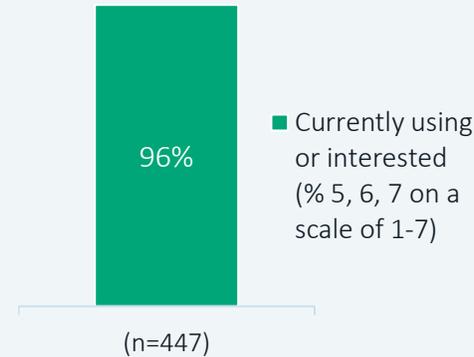
Digital Health Solution Current User Profile

n=456

Regional Profile

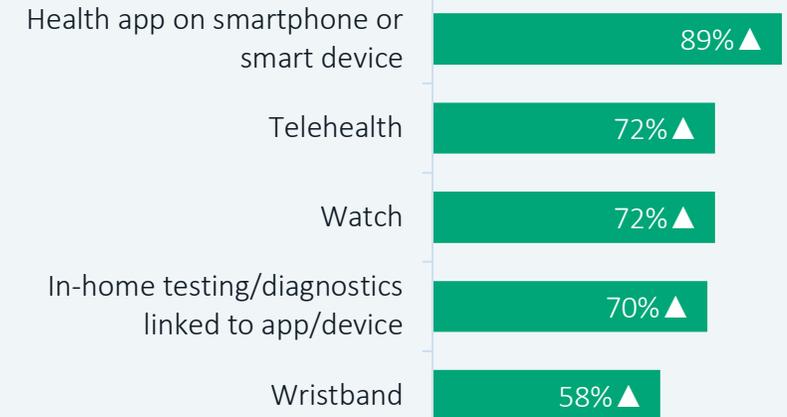


Interest in Using Digital Health Solutions in Next 2 Years*

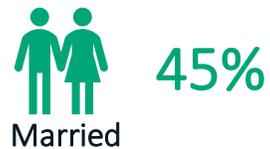
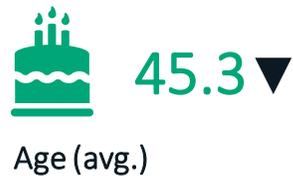


* Among current users with 1+ health areas on mind in next 5 yrs.

Top 5 Types of Digital Health Solutions Interested in Using in Next 2 Years



Demographic Profile

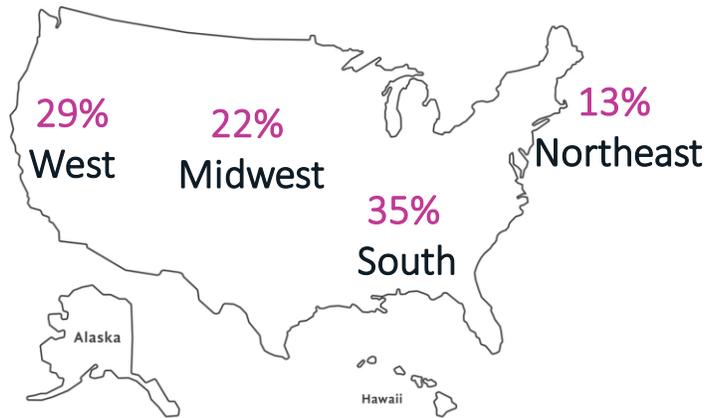


▲ ▼ indicates significant difference compared to total respondents.

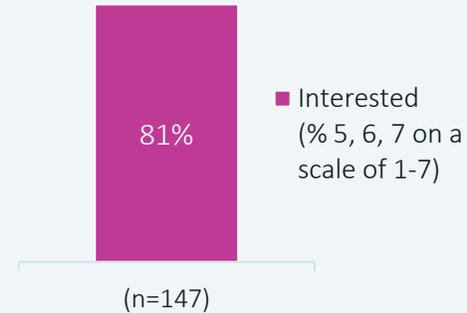
Digital Health Solution Previous User Profile

n=151

Regional Profile

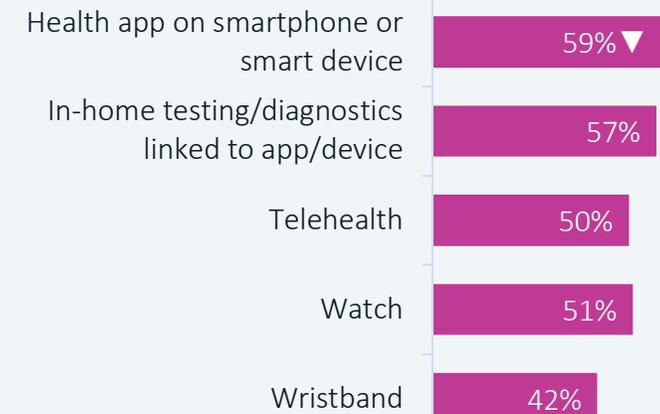


Interest in Using Digital Health Solutions in Next 2 Years*

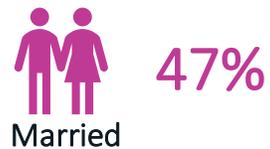


* Among previous users with 1+ health areas on mind in next 5 yrs.

Top 5 Types of Digital Health Solutions Interested in Using in Next 2 Years



Demographic Profile

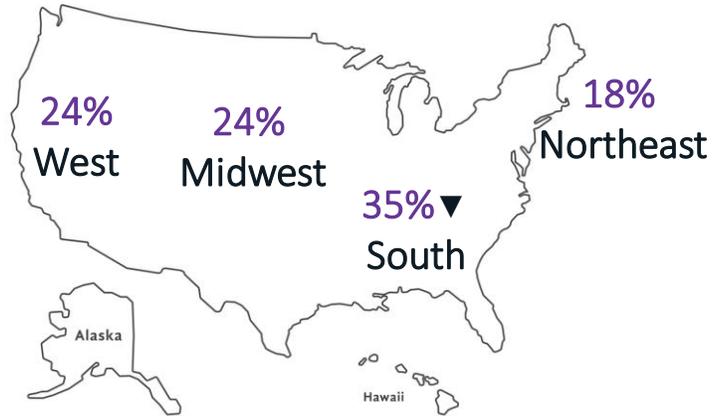


▲ ▼ indicates significant difference compared to total respondents.

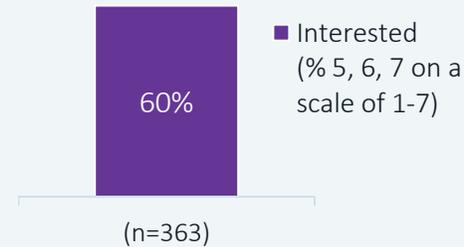
Digital Health Solution Non-User Profile

n=394

Regional Profile

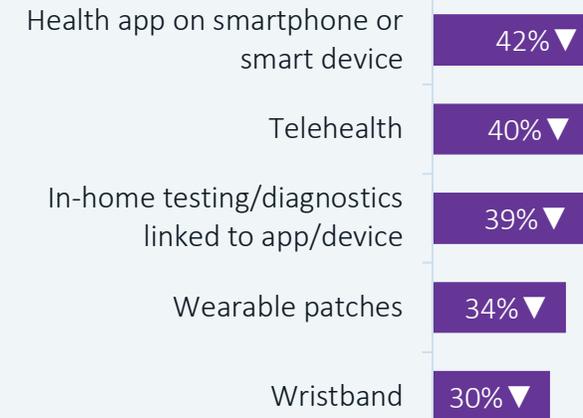


Interest in Using Digital Health Solutions in Next 2 Years*



* Among non-users with 1+ health areas on mind in next 5 yrs.

Top 5 Types of Digital Health Solutions Interested in Using in Next 2 Years



Demographic Profile

53.6 ▲
Age (avg.)

90%
Have health insurance

44%
Have chronic condition

35% ▼
Women of color

38% ▼
Employed

40%
Married

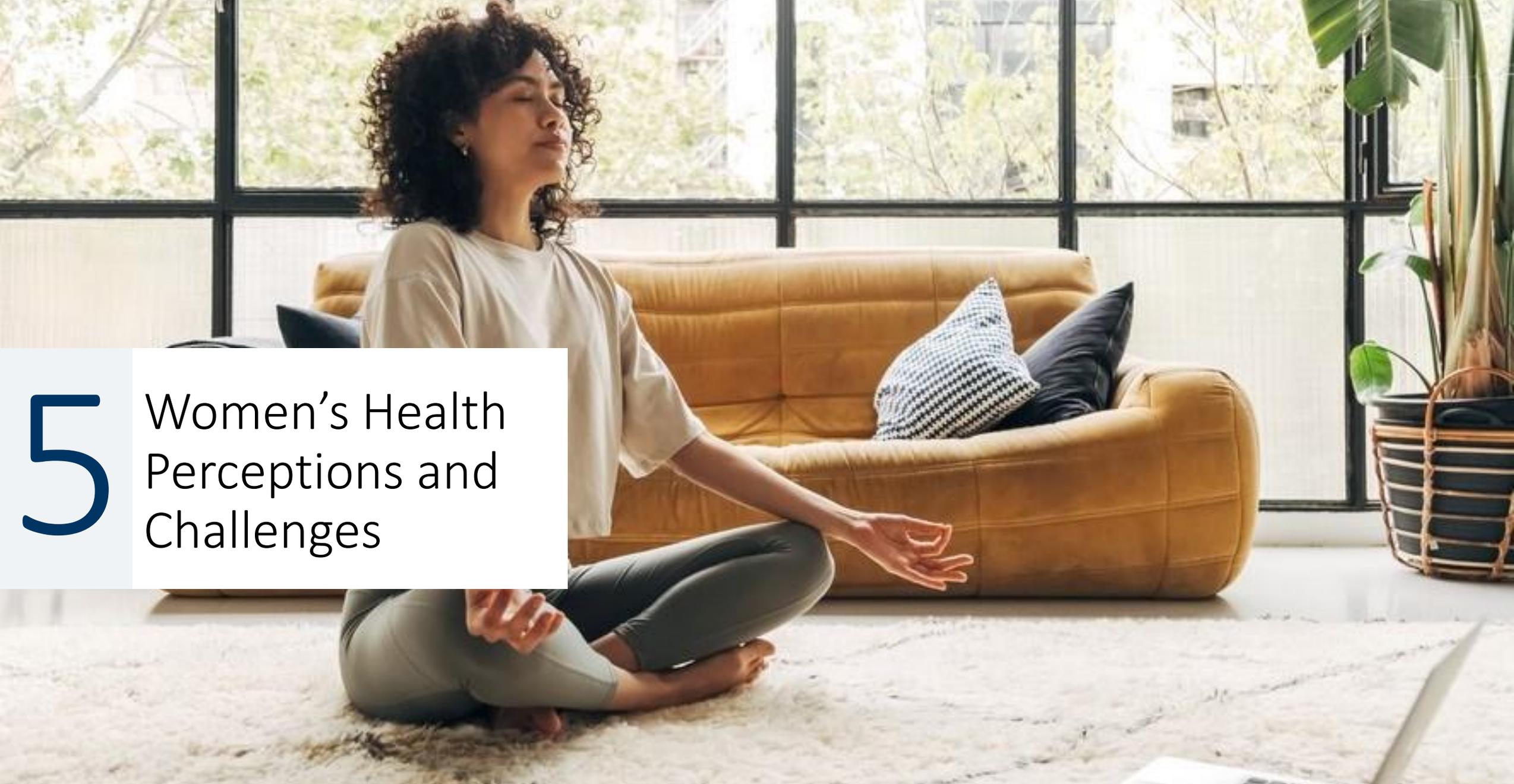
24% ▼
Have kids <18

\$71k ▼
Household income (avg.)

29% ▼
4-year degree +

22%
Urban residence

▲ ▼ indicates significant difference compared to total respondents.



5

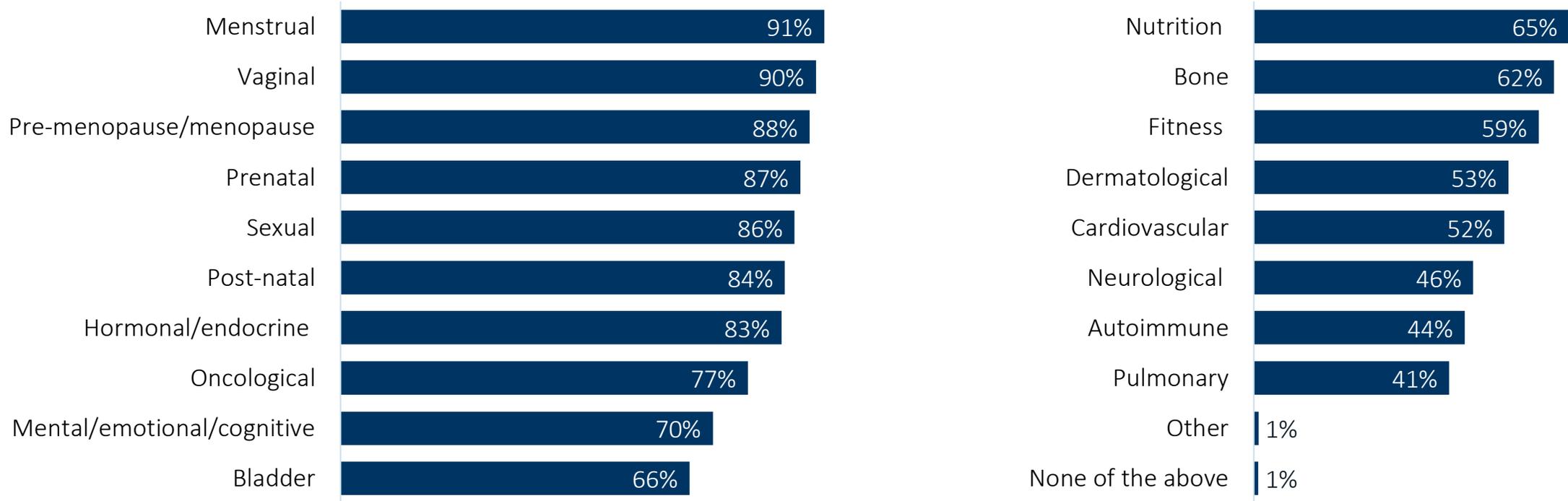
Women's Health Perceptions and Challenges

Most women consider health areas that are uniquely female (e.g., menstrual, vaginal, menopause) to be included under the topic of “women’s health”

- Non-gender specific health areas are less likely to be considered part of “women’s health.”
- Those who are more likely to have a broader view of “women’s health” (i.e., consider more health areas to be included under the topic) include Boomer/Mature women, those with a household income of \$100,000 or more, and those with a chronic condition.

What Women Consider to Be Included Under "Women's Health"

% selecting
Total | n=1001



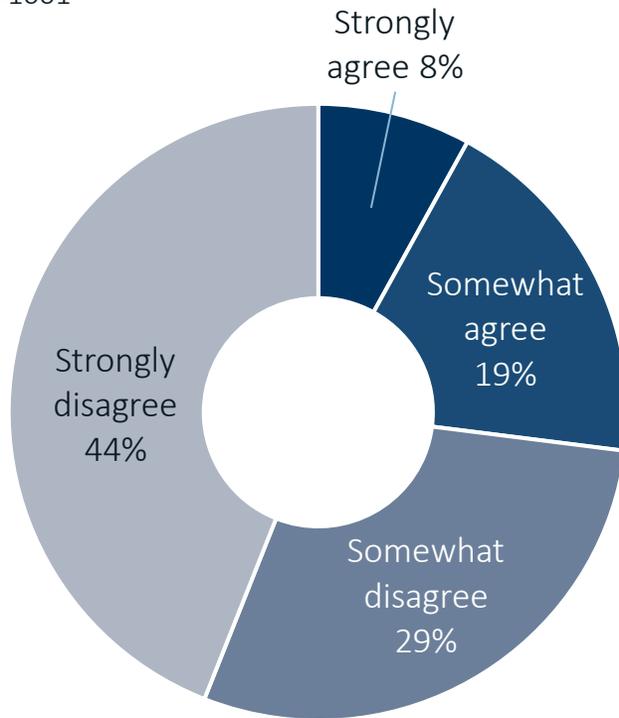
Q. Which of the following health areas, if any, do you consider to be included under the area of “women’s health”?

A majority (73%) disagree that women’s health focuses solely on reproductive health

- This leaves more than one-quarter (27%) who feel women’s health focuses solely on reproductive health. Women who are most likely to feel this way include current users, younger women, women of color and women without chronic conditions.

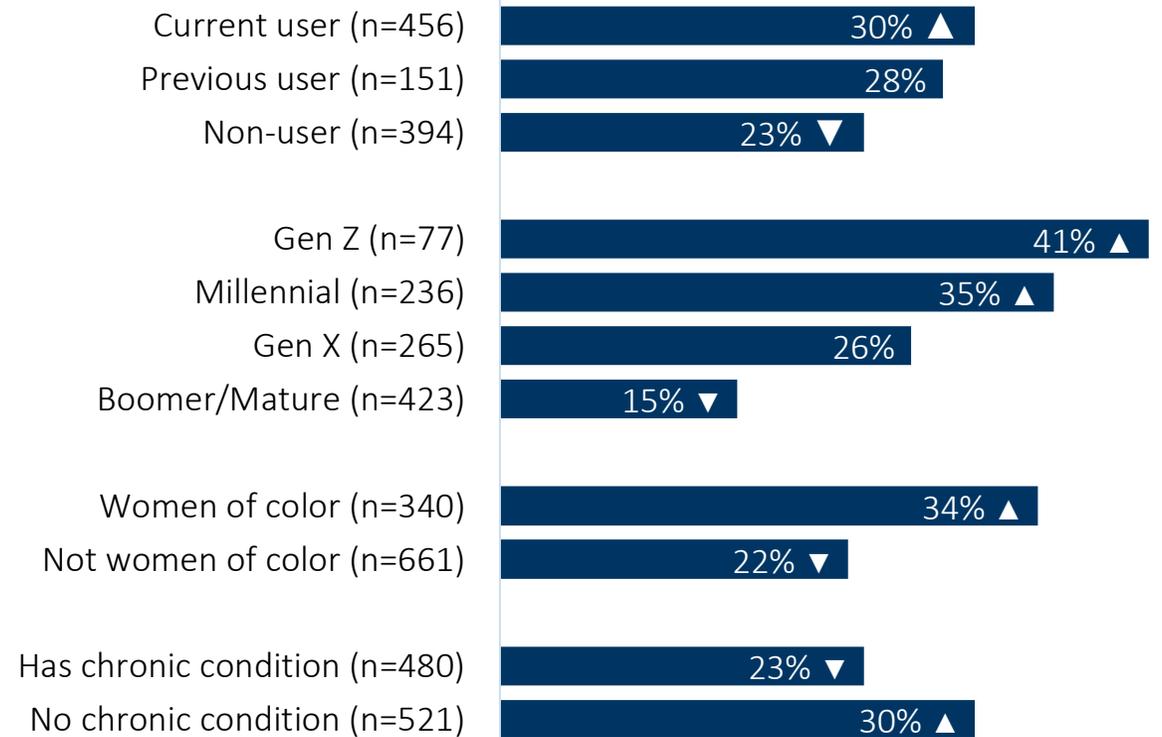
Agreement That Women’s Health Focuses Solely on Reproductive Health

Total | n=1001



Sub-Group Differences in Agreement

% strongly/somewhat agree



Q. Please rate your agreement with the following statement: “Women's health” focuses solely on reproductive health”; ▲ ▼ indicates result is significantly higher/lower than the total.

The top health care challenge, cited by nearly 2 in 5 women, is cost

- Other notable challenges include needing to prioritize health, limited appointment availability and access to affordable health insurance options.
- These challenges are experienced the most among current users, which could have propelled them to start using digital health solutions.

Health Care Challenges Women Face

% selecting | Top 10 responses and "none" displayed
Total | n=1001

		Current user (n=456)	Previous user (n=151)	Non-user (n=394)
High cost of healthcare services	38%	42%▲	42%	30%▼
Needing to prioritize health over other things	25%	31%▲	24%	19%▼
Limited appointment availability/office hours	23%	28%▲	22%	18%▼
Access to affordable health insurance options	21%	23%	17%	19%
Not taken seriously by doctors/lack trust	19%	22%▲	21%	14%▼
Providers don't spend enough time with me	17%	22%▲	15%	12%▼
Needing to take time off work	17%	23%▲	19%	9%▼
Lack of insurance coverage	16%	18%	14%	15%
Not enough doctors accept my insurance	14%	15%	11%	14%
Limited access to specialists I need	14%	17%▲	13%	9%▼
None	25%	19%▼	21%	35%▲

These women are more likely to face multiple challenges:

- Gen Z & Millennials
- Women of color
- Women with chronic conditions

Women in the **South** are more likely to face challenges around **high health care costs**, a **lack of insurance coverage** and access to **affordable coverage options**.

Q. Which of the following, if any, are challenges that you face related to obtaining health care?; ▲ ▼ indicates result is significantly higher/lower than the total.

The majority of women turn to their primary care doctor for health information

- Current users seek out more sources of information, indicating they are more engaged in health management.

Sources Used to Obtain Health Information

% selecting | Top 10 responses and "none of the above" displayed
Total | n=1001

		Current user (n=456)	Previous user (n=151)	Non-user (n=394)
Primary care doctor	78%	81% ▲	75%	75%
Web search	53%	60% ▲	55%	45% ▼
Family or friends	44%	49% ▲	42%	40% ▼
Non-primary care doctor (e.g., specialist)	36%	43% ▲	31%	31% ▼
Other medical practitioners (e.g., nurse)	28%	32% ▲	25%	24% ▼
Health insurance provider	27%	29%	30%	22% ▼
Social media	21%	27% ▲	23%	11% ▼
Medical journals	20%	29% ▲	20%	9% ▼
News stories (large media company)	18%	23% ▲	17%	11% ▼
Smartphone apps	17%	24% ▲	19%	7% ▼
None of the above	4%	2% ▼	6%	5% ▲

The following groups are more likely to use numerous sources to obtain health information:

- Gen Z and Millennials
- Higher income (at least \$100,000)
- Higher education (four-year degree or more)
- Women of color, especially Asian background

Gen X and Boomer/Mature women are more likely to **rely on a primary care doctor** for health information.

Gen Z and Millennials are more likely to use **social media**.

Millennials are more likely to consult a **smartphone app**.

Q. Which of the following sources, if any, do you use to obtain health information?; ▲ ▼ indicates result is significantly higher/lower than the total.



6 Women's Digital Health Solutions



Women's health has been historically underserved and ignored, from male physiology being the default in medicine to the lack of innovations for female-specific conditions. I'm excited that we are at an inflection point, with increased awareness, investment and innovation in the space. We know that improving the lives of women is not only critical for gender equity but also has positive outcomes for the families they care for and society at large.”

- Alice Zheng, principal, RH Capital

Familiarity is highest for fitness digital health solutions

- Non-users have significantly lower familiarity with digital health solution for all areas, emphasizing the opportunity for more education about digital health solutions among this group.

Familiarity with Digital Health Solutions by Health Area

Ranked by very/somewhat familiar | Total | n=1001

Health Area	Total (n=1001)				% very/somewhat familiar		
	Very familiar	Somewhat familiar	Heard of, but not too familiar	Have not heard of any	Current user (n=456)	Previous user (n=151)	Non-user (n=394)
Fitness	29%	30%	20%	21%	83%▲	68%▲	25%▼
Nutrition	20%	27%	26%	27%	68%▲	56%▲	16%▼
Mental/emotional/cognitive	20%	25%	24%	31%	63%▲	55%▲	17%▼
Menstrual	22%	21%	21%	36%	64%▲	47%	14%▼
Cardiovascular	13%	25%	27%	35%	56%▲	37%	15%▼
Sexual	14%	22%	23%	41%	52%▲	40%	13%▼
Vaginal	13%	20%	19%	48%	49%▲	38%	11%▼
Prenatal	15%	18%	25%	42%	47%▲	37%	13%▼
Dermatological	12%	20%	20%	47%	47%▲	36%	12%▼
Post-natal	11%	19%	22%	48%	43%▲	38%	12%▼
Pre-menopause/menopause	14%	16%	25%	45%	42%▲	32%	13%▼
Bladder	11%	17%	22%	50%	42%▲	32%	11%▼
Neurological	8%	20%	25%	47%	42%▲	33%	9%▼
Bone	10%	18%	22%	50%	39%▲	28%	13%▼
Oncological	10%	17%	24%	49%	37%▲	30%	13%▼
Pulmonary	9%	17%	25%	49%	38%▲	26%	11%▼
Hormonal/endocrine	9%	15%	24%	51%	37%▲	26%	8%▼
Autoimmune	7%	13%	25%	56%	30%▲	19%	7%▼

■ Very familiar ■ Somewhat familiar ■ Heard of, but not too familiar ■ Have not heard of any

Q. How familiar are you with digital health solutions that are currently available to provide support for women in the following health areas?; ▲ ▼ indicates result is significantly higher/lower than the total.

Women most often learn about digital health solutions through web searches, family/friends or their primary care doctor

How Women Became Aware of Digital Health Solutions

Among those who have heard of a solution in at least one health area | n=851

% selecting | Responses >10% displayed

		Current user (n=456)	Previous user (n=151)	Non-user (n=244)
Web search	36%	43% ▲	38%	20% ▼
Family or friends	35%	40% ▲	30%	29% ▼
Primary care doctor	35%	44% ▲	33%	17% ▼
Social media	27%	30% ▲	32%	19% ▼
Advertising on a website	18%	19%	21%	14% ▼
Health insurance provider	16%	19% ▲	17%	8% ▼
News stories (large media company)	12%	14%	8%	11%
Non-primary care doctor	12%	16% ▲	9%	5% ▼

Gen Z and Millennials are more likely to have learned about digital solutions via **advertising on a website or social media**.

Women with a **chronic condition** are more likely to have become aware via **medical professionals or web searches**.

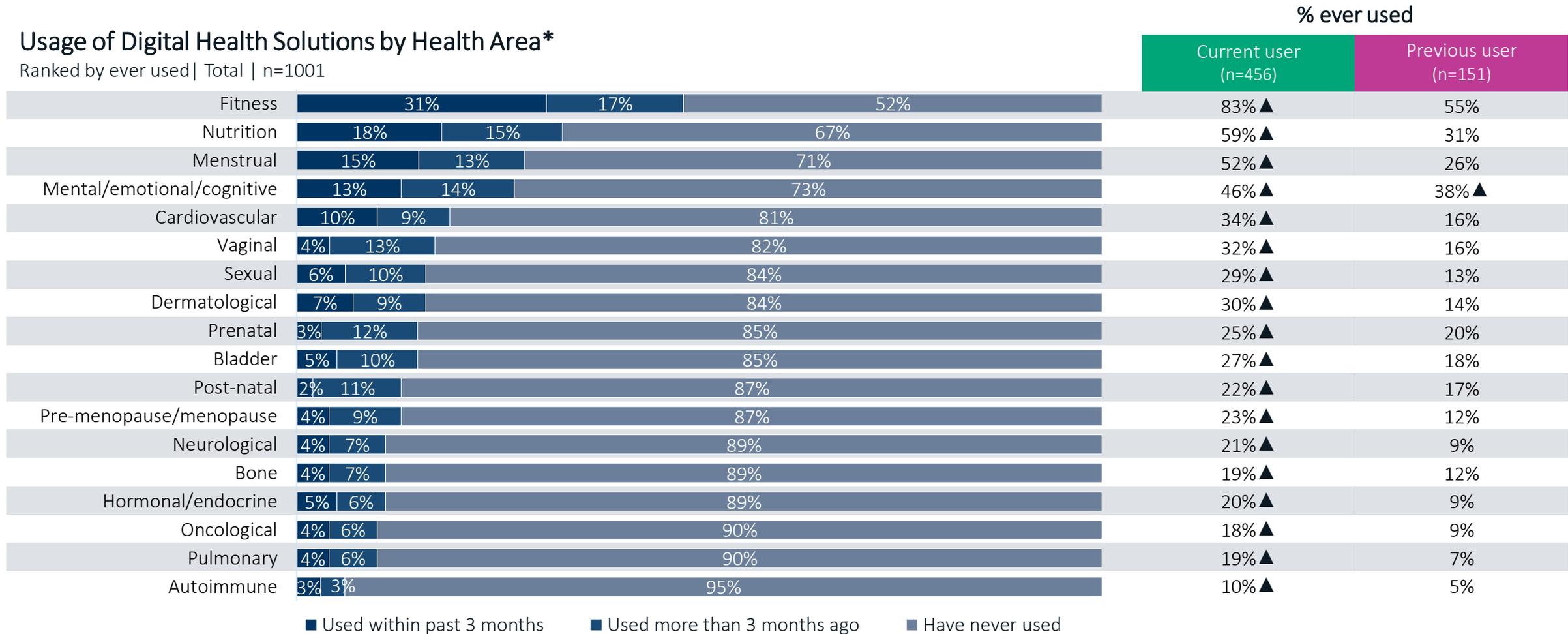
Q. You indicated you are aware of digital health solutions in one or more women's health areas. How did you learn about the digital health solution(s)?; ▲ ▼ indicates result is significantly higher/lower than the total.

Among all women, more than half have never used a digital health solution for any of the areas listed

- Digital health solutions for fitness, nutrition, menstrual health and mental/emotional/cognitive health are most used.

Usage of Digital Health Solutions by Health Area*

Ranked by ever used | Total | n=1001



■ Used within past 3 months ■ Used more than 3 months ago ■ Have never used

Q. Which of the following describes your usage of digital health solutions for each women's health area below?; * Those who have never heard of a digital health solution for an area were coded as "have never used"; ▲ ▼ indicates result is significantly higher/lower than the total.



[Women's health technology is important because it] aids in providing autonomy, which ensures that each woman can actively participate in her own journey towards a healthier lifestyle."

- Ana Kostadinovska, standardization officer, Philips

Two in five current/previous users began using digital health solutions as an effective way to track/monitor their health or to positively impact their health

- Establishing or strengthening healthy habits are also common motivations, especially among current users.

Reasons Women Started Using Digital Health Solutions

% selecting | Top 10 responses displayed

Total among current and previous users | n=607

		Current user (n=456)	Previous user (n=151)
Effective way to track/monitor health	40%	44% ▲	28%
Wanted to make positive impact on health	39%	41%	35%
To establish new healthy habits	36%	40% ▲	26%
To strengthen existing healthy habits	31%	33% ▲	24%
Became relevant for situation/life stage	26%	28%	20%
Felt like I needed outside help	21%	23%	16%
Recommended by medical professional	18%	20%	14%
Was covered by health insurance	17%	19% ▲	10%
Was recommended by family/friends	16%	17%	12%
To save me money on future medical expenses	12%	13%	12%

Women of color are more likely to have started because they felt they needed **outside help in improving their health** or it would **save them money** on medical expenses in the long run.

High-income women are more likely to be motivated to **establish new healthy habits** or **strengthen existing** healthy habits.

Women with a **chronic condition** more commonly started using a solution because it **became relevant to their current situation/life stage**, it was **recommended by a medical professional**, they **wanted to make a positive impact** on their health or they felt like they **needed outside help** in improving their health.

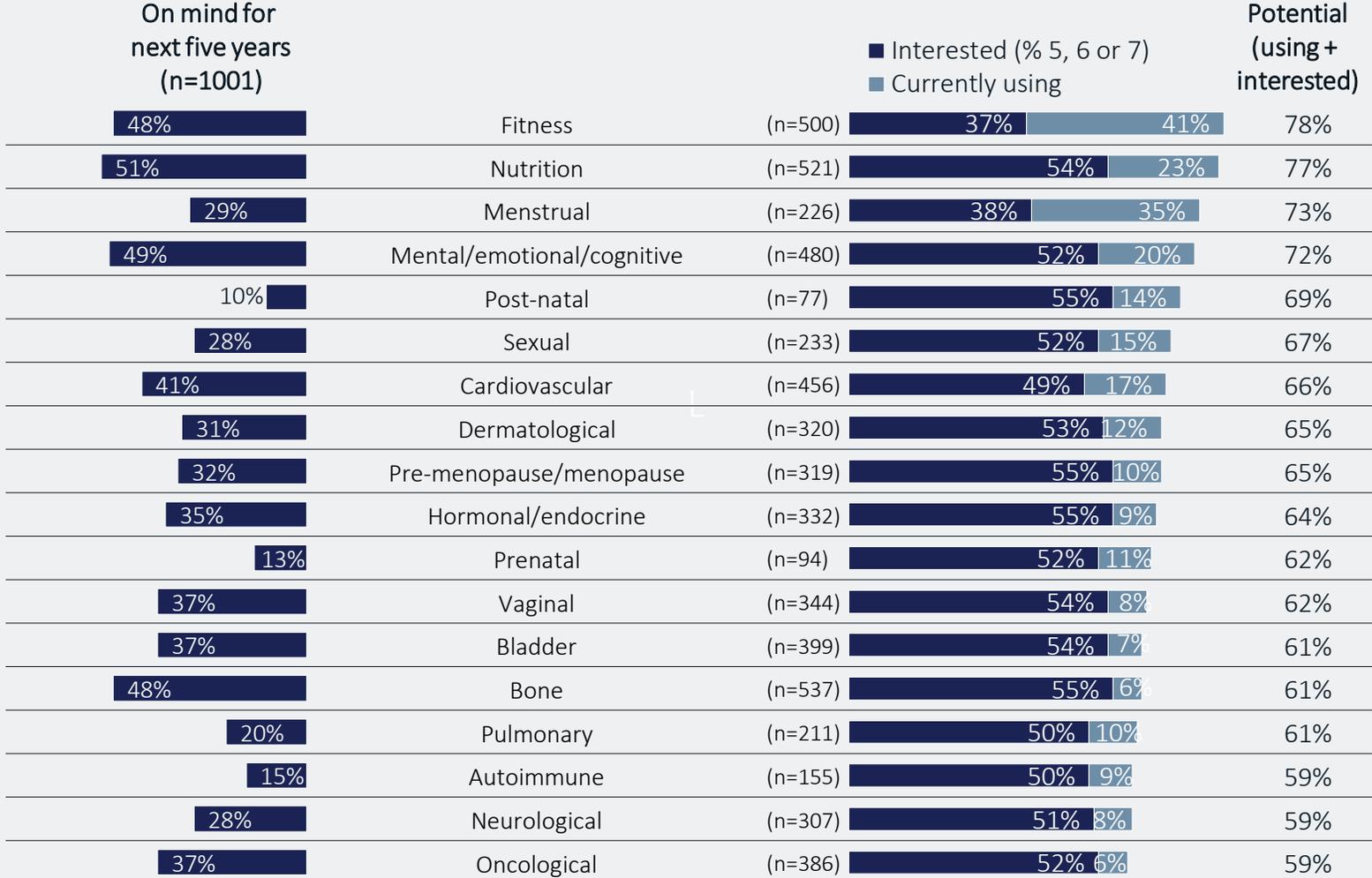
Q. Which of the following, if any, are reasons why you started using digital health solution(s)?; ▲ indicates result is significantly higher than the other group.

Half will have fitness, nutrition and mental health on their minds in the next five years; among them, more than 7 in 10 use or are interested in solutions in these areas

- Half will also have bone health on their minds, yet fewer than 2 in 3 women are interested in or currently using a digital health solution for this area.
- Among those not currently using digital health solutions, women of color, especially those of Hispanic/Latino background, are more likely to be interested in using one in the next five years.

Potential for Digital Health Solutions by Health Area (Next Two Years)

Asked for each health area on women's minds over the next five years



Q. Thinking about the next five years, which of the following health areas, if any, do you think may be on your mind?

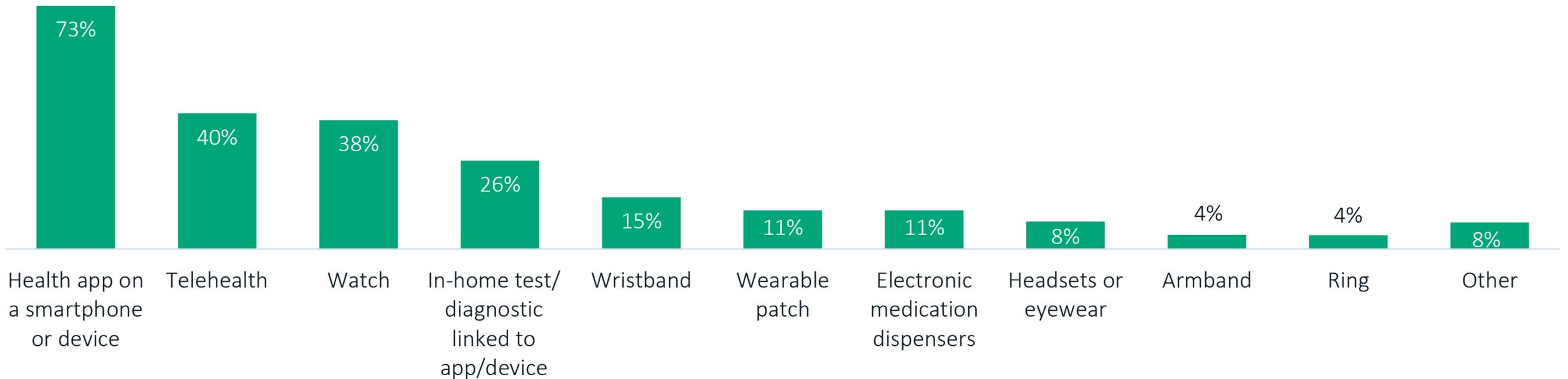
Q. How interested would you be in using digital health solutions in each of the following women's health areas in the next two years?

Two in three women (66%*) currently use more than one digital health solution, with health apps being the most popular

- Women who have a chronic condition or live in the city are more likely to use telehealth.
- More than half (54%*) use wearables. Those who are more likely to use wearables include northeast region residents and those with an Asian background.

Usage of Digital Health Solution Technologies

% selecting | Current users | n=456



Q. You indicated that you use a digital health solution in at least one health area. Please select the digital health solution(s) that you are using in the following health area: [HEALTH AREA].

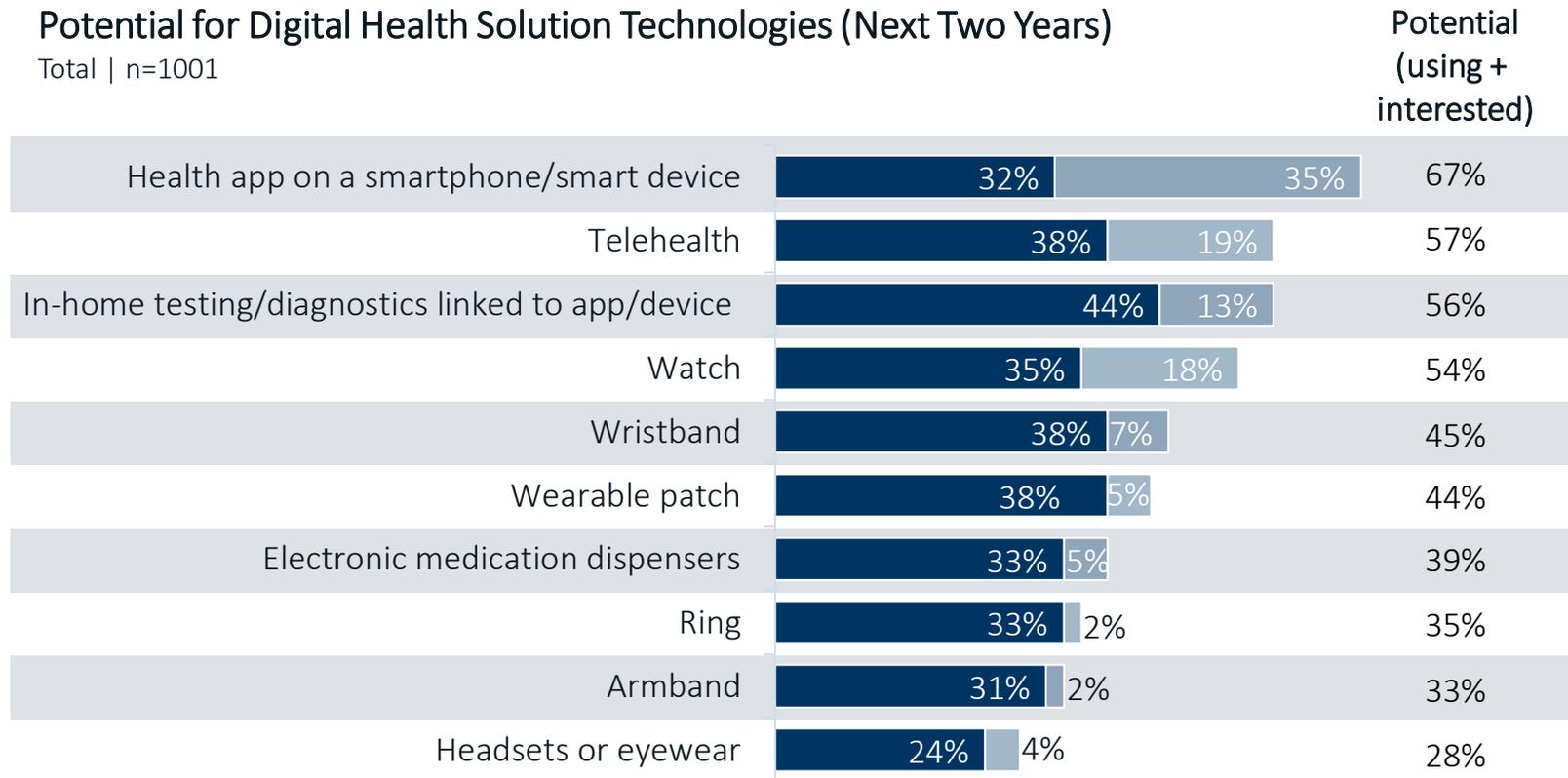
*Data not shown in chart. NOTE: Results displayed are rolled up across all health areas; “wearables” include watch, wristband, armband, ring, wearable patch and headsets/eyewear.

When it comes to specific solutions and devices, more than half are currently using or interested in using health apps, telehealth, in-home testing linked to an app/device and smartwatches

- Although few women use wristbands and wearable patches, around 2 in 5 are interested in using them.

Potential for Digital Health Solution Technologies (Next Two Years)

Total | n=1001



Potential (usage + % 5, 6, 7 interested) is higher among:

- Millennials
- Higher income (\$100,000 or more)

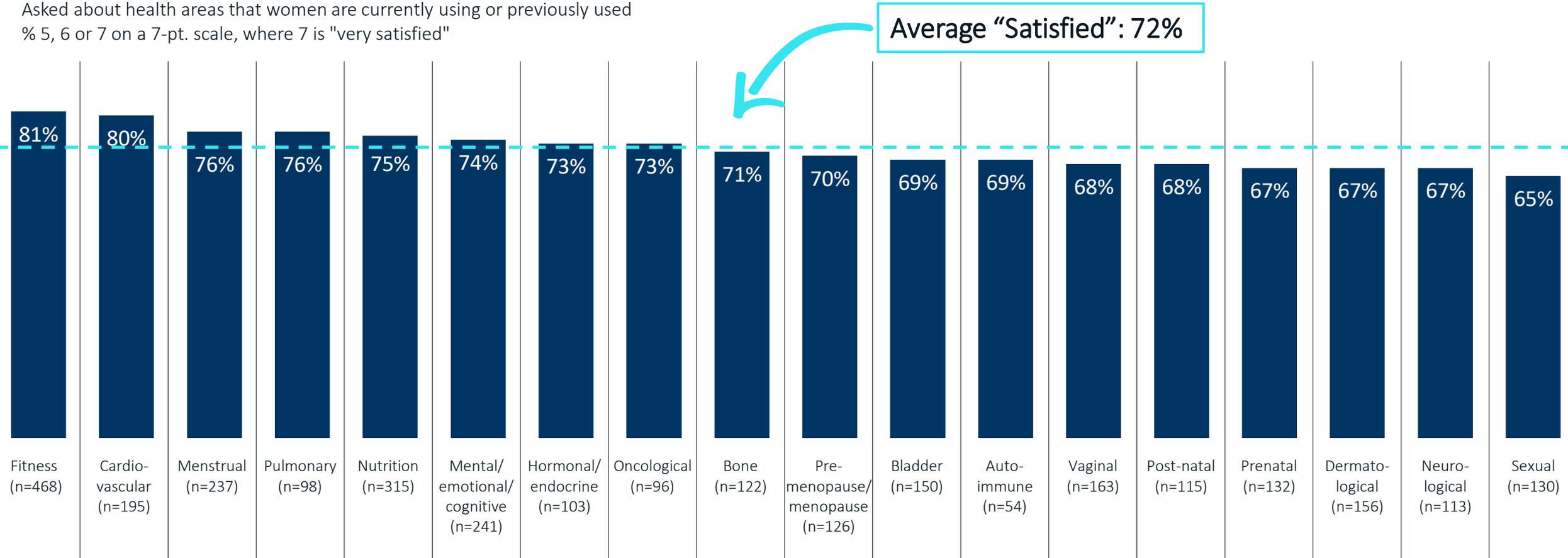
Boomer/Mature women are least likely to be using a digital health technology or interested in using one in the next two years

Q. How interested would you be in using the following types of digital health solutions in the next two years?; NOTE: "Wearables" include watch, wristband, armband, ring, wearable patch and headsets/eyewear.

Most current and previous users are satisfied with digital solutions, especially fitness and cardiovascular solutions, but there is still room for improvement

Satisfaction with Digital Health Solutions by Health Area

Asked about health areas that women are currently using or previously used
% 5, 6 or 7 on a 7-pt. scale, where 7 is "very satisfied"

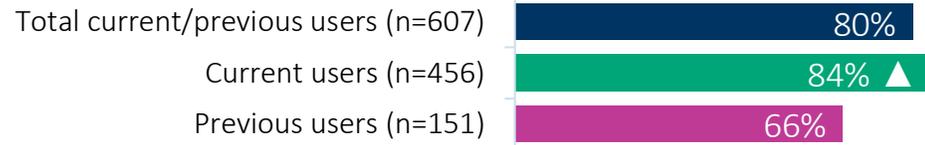


Q. You indicated that you use, or have used, digital health solutions in the following women's health area(s). Please rate your satisfaction with your experience using digital health solutions in each women's health area.

Most current and previous users feel digital health solutions are valuable overall and give them the power to track their health

Value of Digital Health Solutions Overall

Among current and previous users of digital health solutions
% 5, 6 or 7 on a 7-pt. scale, where 7 is "very valuable"



"I love the power it gives me to take charge of my own health."

- Value of "7" | Current user | Gen Z | Woman of color | No chronic condition

"It is a convenient way to track health information I can share with my provider."

- Value of "6" | Current user | Boomer/Mature | Caucasian | Has chronic condition

"Helps manage my diabetes and keep up to date with my doctor to lower my A1C."

- Value of "6" | Current user | Gen Z | Caucasian | Has chronic condition

"It has been an added layer of accountability in my health and fitness journey. It also helped me better understand my menstrual cycle."

- Value of "6" | Current user | Millennial | Caucasian | No chronic condition

"I didn't find it as useful or as informative as I would have hoped. It didn't seem worthwhile given the effort and the time and expense."

- Value of "4" | Previous user | Boomer/Mature | Caucasian | No chronic condition

"I prefer the human experience. I'm not a machine."

- Value of "2" | Previous user | Gen X | Caucasian | Has chronic condition

"I like access of using and tracking my own health, however, I would worry about the government tracking me as a woman if I were younger. I worry about my daughter."

- Value of "6" | Previous user | Boomer/Mature | Caucasian | Has chronic condition

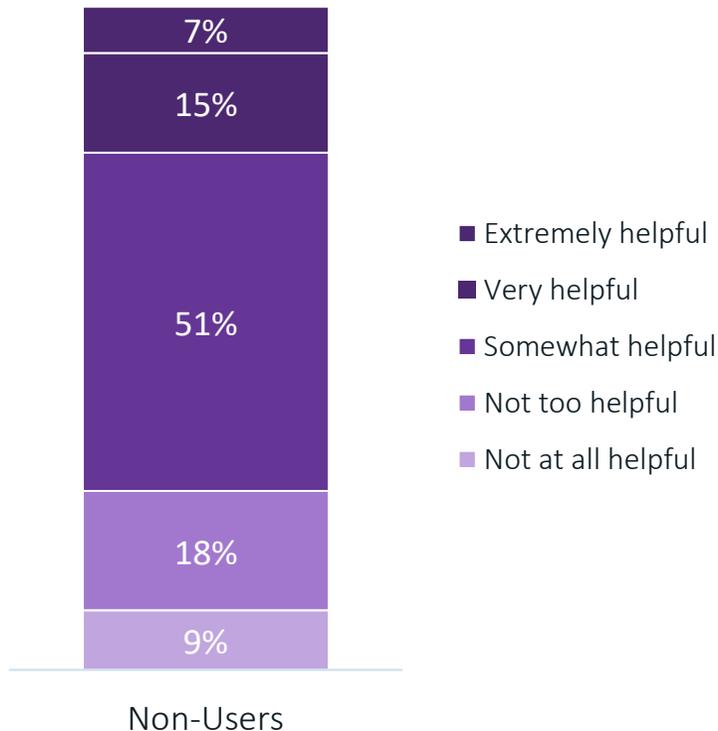
Q. You indicated that you use, or have used, digital health solutions. Thinking about your experience overall, how valuable are digital health solutions to you?; Q. Why do you rate the value of digital health solutions as a [RATING] out of 7?;

▲ indicates result is significantly higher than the other group.

Most non-users think digital health solutions would be somewhat helpful in improving their overall health

Helpfulness of Digital Health Solutions

Among **non-users** who have at least heard of a digital solution
n=244



“More information and monitoring will result in **better understanding** of what the body is doing for MDs and the patient. More knowledge earlier during an illness or disease process will result in **getting ahead of more serious conditions.**”

- Rating of “very helpful” | Boomer/Mature | Caucasian | Has chronic condition

“I am diabetic and glucose monitoring would be helpful to me, because I would automatically **know what my numbers are** and then can **make smart choices.**”

- Rating of “very helpful” | Boomer/Mature | Caucasian | Has chronic condition

“I do not like taking off work to go see a doctor, so I never go. This would **allow me to get medical advice** or help **without having to be in a doctor’s office.**”

- Rating of “very helpful” | Millennial | Caucasian | No chronic condition

“They may be more **accessible** and **lower cost.**”

- Rating of “somewhat helpful” | Gen Z | Caucasian | No chronic condition

“I’m old school and **prefer seeing doctors and specialists in person as opposed to online.** Technology has been very beneficial for medical health, but there **can be glitches** in the products.”

- Rating of “not too helpful” | Millennial | Caucasian | Has chronic condition

“When I have a health issue, I **want to be physically seen by a doctor** not a computer.”

- Rating of “not too helpful” | Millennial | Caucasian | No chronic condition

“Because the area I live in is rural and the **internet is not a very stable** connection here.”

- Rating of “not at all helpful” | Boomer/Mature | Caucasian | No chronic condition

Q. Given what you know about digital health solutions, how helpful, if at all, do you feel they would be in improving your overall health?; Q. Why do you think that digital health solutions would be [INSERT RATING] in improving your overall health?

Importance of and Motivations for Digital Health Solution Adoption

As shown in the next few slides, **motivational themes emerge** from top considerations that **satisfy deeper emotions and personal values** women are trying to achieve.

Value Propositions for Digital Health Solution Adoption



Low Cost

Digital health solutions that are **low cost** or **covered/reimbursed by insurance** allow women to **save money**, which makes them feel **secure** and **relieved**. This gives them **peace of mind** and makes them feel **responsible** in how they **manage their money**.



Life-Affirming

A solution that is **accurate**, **approved by the Food and Drug Administration (FDA)** and **doctor-recommended** helps women **trust** it will work in their best interest and be **effective**, putting them in **charge**. This makes them feel in **control** and **confident**, which matters because women want to **manage resources responsibly** and **get the most out of life**.



Control My Health

A digital solution that provides **accurate information** can be **trusted** to work in women's best interests and **puts them in charge** of their health care, making them feel **in control**, **confident** and **responsible**. This makes them feel **responsible for their health**.



Peace of Mind

A digital solution that is **FDA-approved** and has a **high standard of data security/privacy** helps women **trust** that it will work in their best interests, which in turn helps them feel **secure**, giving them **peace of mind**.



Ease of Use

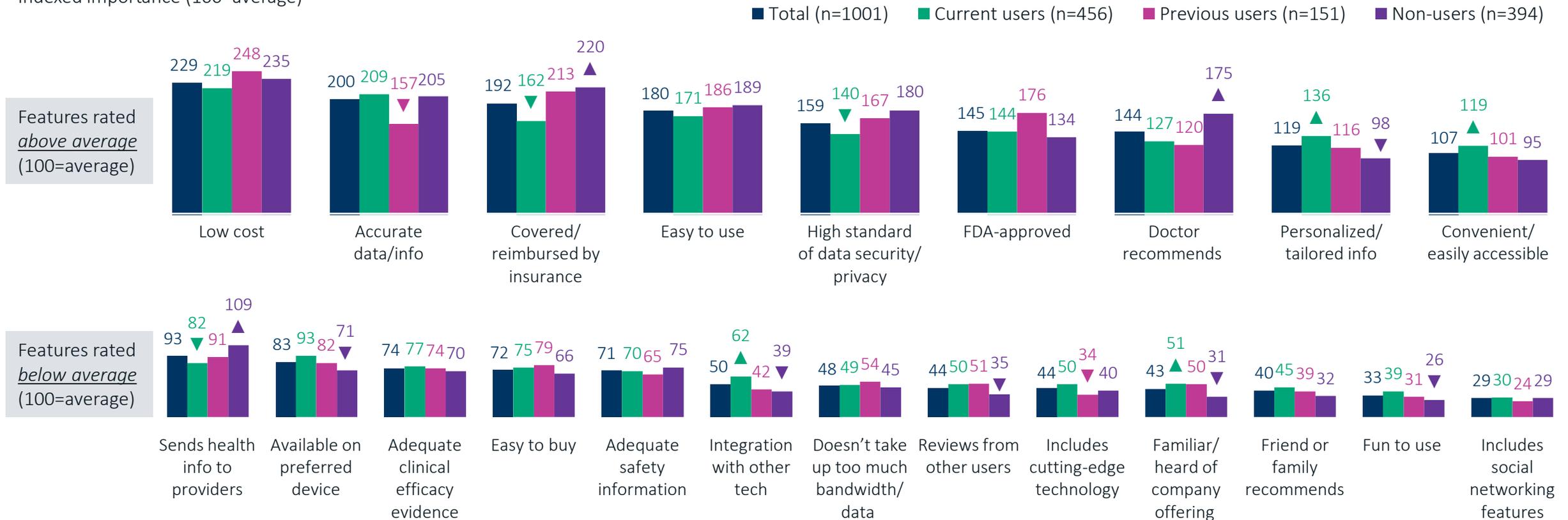
A digital solution that is **easy to use** makes it **simple** for women, helping them feel **confident**. This gives them **peace of mind**.

Cost, accuracy and insurance coverage/reimbursement are the most important considerations for digital solution adoption

- Insurance coverage/reimbursement is more important to non-users. While some features might be lower in importance, strong performance in these areas may motivate women to try digital solutions.

Importance of Digital Health Solution Considerations for Adoption*

Indexed importance (100=average)



Q. How important would each of the following be to you when considering whether to start using a digital solution to manage your health?; Q. Please rank the following considerations in order of their importance to you, where 1 is most important. Scores are indexed so that 100 = average of all considerations, 200 is twice the average and 50 is half the average of all considerations.

*See [appendix](#) for more details on analysis; ▲ ▼ indicates result is significantly higher/lower than the total.

Saving money and trusting solutions to work in one's best interest are the most common functional benefits when considering digital solution adoption

Functional Benefits When Deciding Whether to Use a Digital Health Solution

Top eight benefits | Total n=988

		Current user (n=456)	Previous user (n=151)	Non-user (n=381)
Saves me money	22%	21%	23%	23%
I can trust it to work in my best interests	22%	20%	24%	23%
I know it will be effective	11%	12%	8%	10%
Puts me in charge of my own healthcare	11%	11%	11%	9%
Motivates me to do something to better my health	9%	10%	8%	8%
Is easy for me to use	8%	7%	8%	10%
Is easy for me to understand	5%	5%	4%	5%
Allows me to do things anywhere and anytime	5%	5%	3%	5%

Q. Why is [ANSWER FROM LA1] most important in your decision to start using a digital solution to manage your health? Please select one.

Feeling in control, secure, confident and relieved are the most popular psychosocial benefits associated with digital solution adoption

- Those with a chronic health condition are more likely to say the feeling of relief would drive them to use a digital health solution.

Emotional Benefits When Deciding Whether to Use a Digital Health Solution

Total n=988

		Current user (n=456)	Previous user (n=151)	Non-user (n=381)
In control	24%	29%▲	22%	19%▼
Secure	17%	13%▼	18%	20%▲
Confident	15%	15%	17%	13%
Relieved	14%	13%	12%	17%
Responsible	11%	12%	11%	8%▼
Efficient	9%	7%	8%	10%
Smart	5%	5%	4%	5%
Productive	5%	4%	6%	6%
Carefree	1%	1%	1%	2%

Q. How does [ANSWER FROM LA2] make you feel? Please select one.
 ▲ ▼ indicates result is significantly higher/lower than the total.

The most common personal values achieved through digital solution adoption are responsibility for one's health and peace of mind

- Boomer/Mature women are more likely to associate the value of not being dependent on others with using digital health solutions.

Values Associated with Starting to Use a Digital Health Solution

Total n=988

		Current user (n=456)	Previous user (n=151)	Non-user (n=381)
I want to be responsible for my own health	28%	34% ▲	25%	23% ▼
I want peace of mind	28%	23% ▼	28%	35% ▲
I want to be responsibly managing my resources	17%	15%	23%	18%
I do not want to be dependent on others	10%	9%	11%	11%
I want to get the most out of life	9%	8%	7%	9%
I want to be successful in life	3%	5% ▲	3%	2% ▼
I want to be a good parent or family member	2%	3%	2%	1% ▼
I want to have mastery over my destiny	2%	3% ▲	0%	2%

Q. Why would it matter to you that [ANSWER FROM LA1] resulted in [ANSWER FROM LA2] and made you feel [ANSWER FROM LA3]? Please select one.

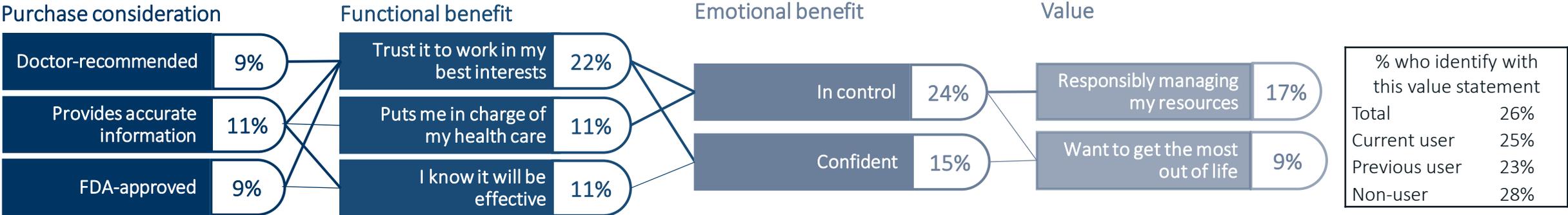
▲ ▼ indicates result is significantly higher/lower than the total.

Value statements were developed from laddered responses to the benefits and values shown on the previous slides; below are the two that resonate most*

"LOW COST" VALUE STATEMENT: A digital health solution that is low cost and covered by insurance helps me save money, which makes me feel secure and relieved. This matters because I will have peace of mind and be able to responsibly manage my resources.



"LIFE-AFFIRMING" VALUE STATEMENT: When a digital health solution provides accurate information, is FDA-approved and is doctor-recommended, I trust it will work in my best interests and will be effective, which puts me in charge of my health care. This makes me feel in control and confident, which matters because I want to responsibly manage my resources and get the most out of life.



*See [appendix](#) for more analysis methodology and value statement chains. NOTE: Percentages in the value chain are the total % of women who chose this feature, benefit or value. The “% who identify with this value statement” includes all women for whom this is the best fit and who connected at least two levels in the value statement.

Most current and previous users agree that digital solutions provide helpful health insights and make them feel more empowered in managing their health

- That said, only half agree that it helps them feel more connected to their provider and has helped to reduce their overall medical costs.

Agreement with Statements About Digital Health Solutions

Among current and previous users of digital health solutions | n=607

% 5, 6 or 7 on a 7-pt. scale, where 7 is "strongly agree"

		Current user (n=456)	Previous user (n=151)
Have provided helpful insights about my health	71%	76% ▲	54%
Help me feel more empowered in managing health	70%	74% ▲	59%
Health overall has improved as a result of using	59%	65% ▲	39%
Help me feel more connected to my provider(s)	53%	59% ▲	37%
Have helped reduce my overall medical costs	45%	49% ▲	31%

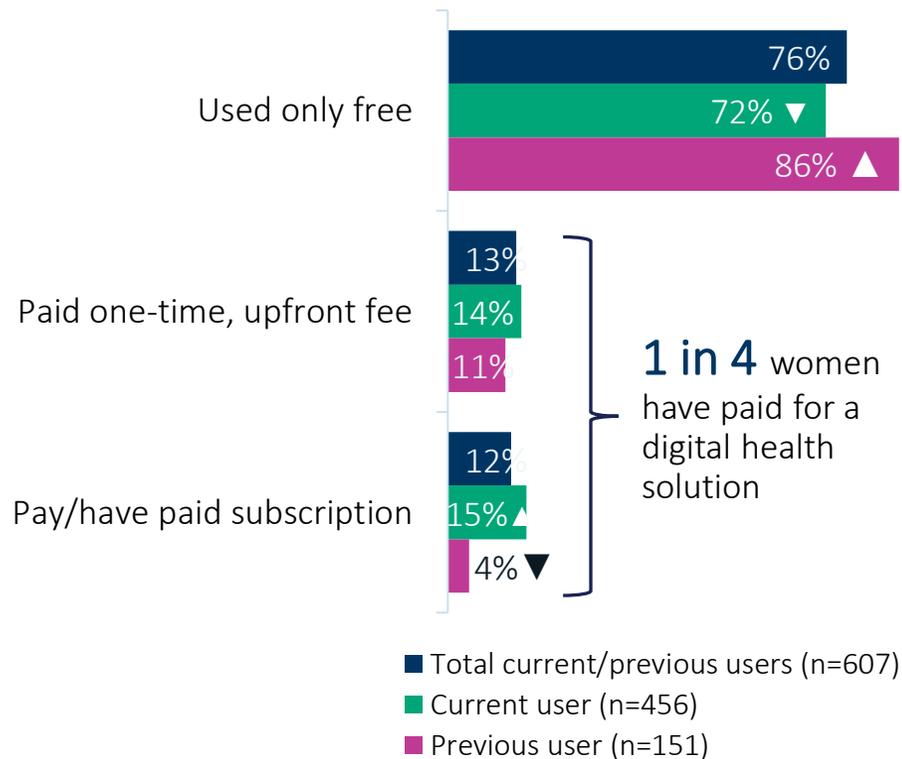
Q. Please rate your agreement with the following statements regarding digital health solutions; ▲ indicates result is significantly higher than the other group.

Many women have only used free digital solutions, especially previous users

- Nearly 2 in 5 current users would be willing to budget for out-of-pocket digital solutions, with an average annual amount of \$215. While 3 in 10 previous users would be willing to pay, they would budget less, at \$119 on average.

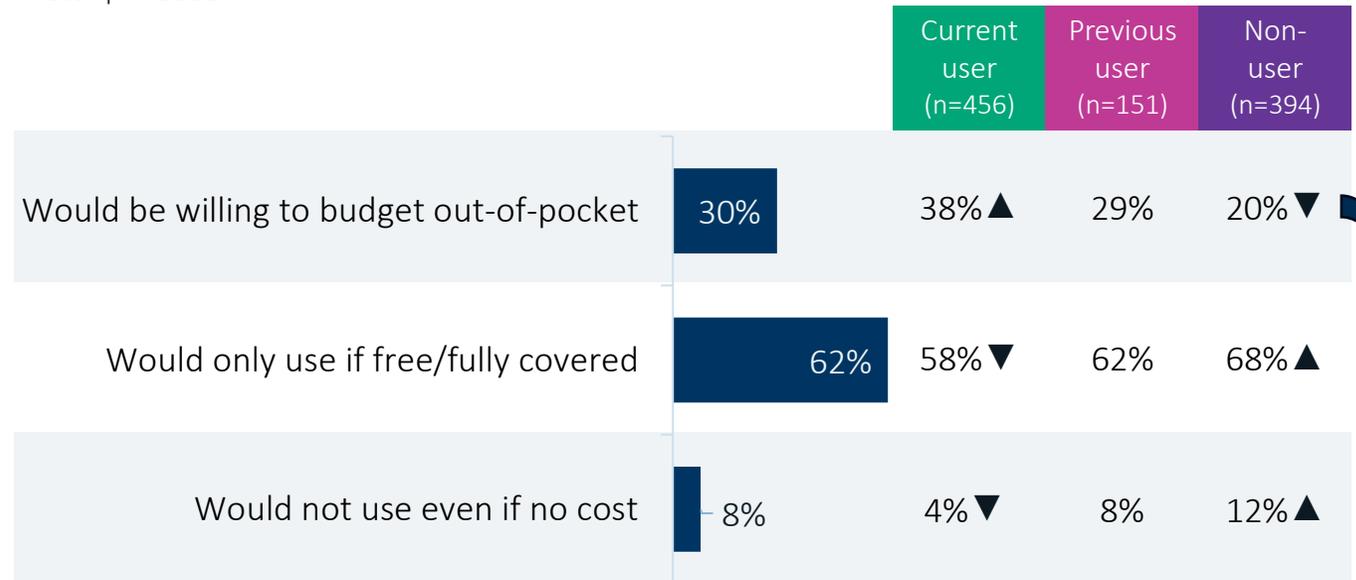
Current/Past Payment for Digital Health Solutions

Among current and previous users



How Much Women Are Willing to Budget Out-of-Pocket for 12-Month Period

Total | n=1001



More likely to be willing to budget out-of-pocket: Millennials, four-year degree or more, \$100,000 or more household income

Average amount willing to budget annually	Current user (n=456)	Previous user (n=151)	Non-user (n=394)
	\$215	\$119 ▼	\$184

Q. Thinking about the digital health solutions you have used, did you or do you pay for at least one?; Q. How much would you be willing to budget out of pocket (not covered by health insurance) for a 12-month period for a digital health solution that you thought would improve your health (not for urgent care)?; ▲ ▼ indicates result is significantly higher/lower than the total.



Health care is not a one-size-fits-all solution, and that's especially true for women. Continued innovation in health technology inherently poses an opportunity to provide personalized solutions and insights specific to women's unique and intricate health needs, and ultimately empowering them to take control of their health. While innovation is key to improving the lives of women, improving access to new technology is just as — if not more — important. As technology continues to evolve, it's critical that businesses, providers, governments and payers work collaboratively to improve access and coverage to new technologies to effectively address health inequities and gaps in women's health care.”

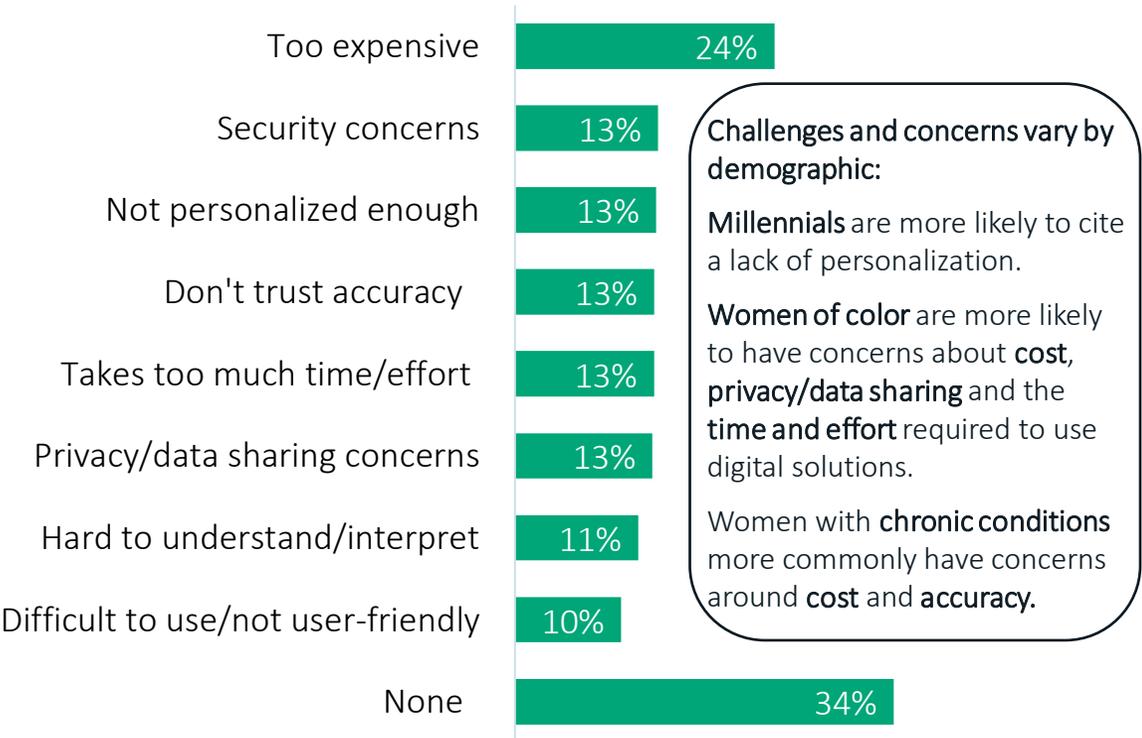
- Neeta Sharma, vice president of global regulatory affairs, Dexcom

While a third of current users do not experience challenges or concerns when using digital health solutions, a quarter cite cost as a challenge

- Top barriers for non-users include cost, lack of awareness, security and privacy/data sharing concerns, and uncertainty about which solution to choose.

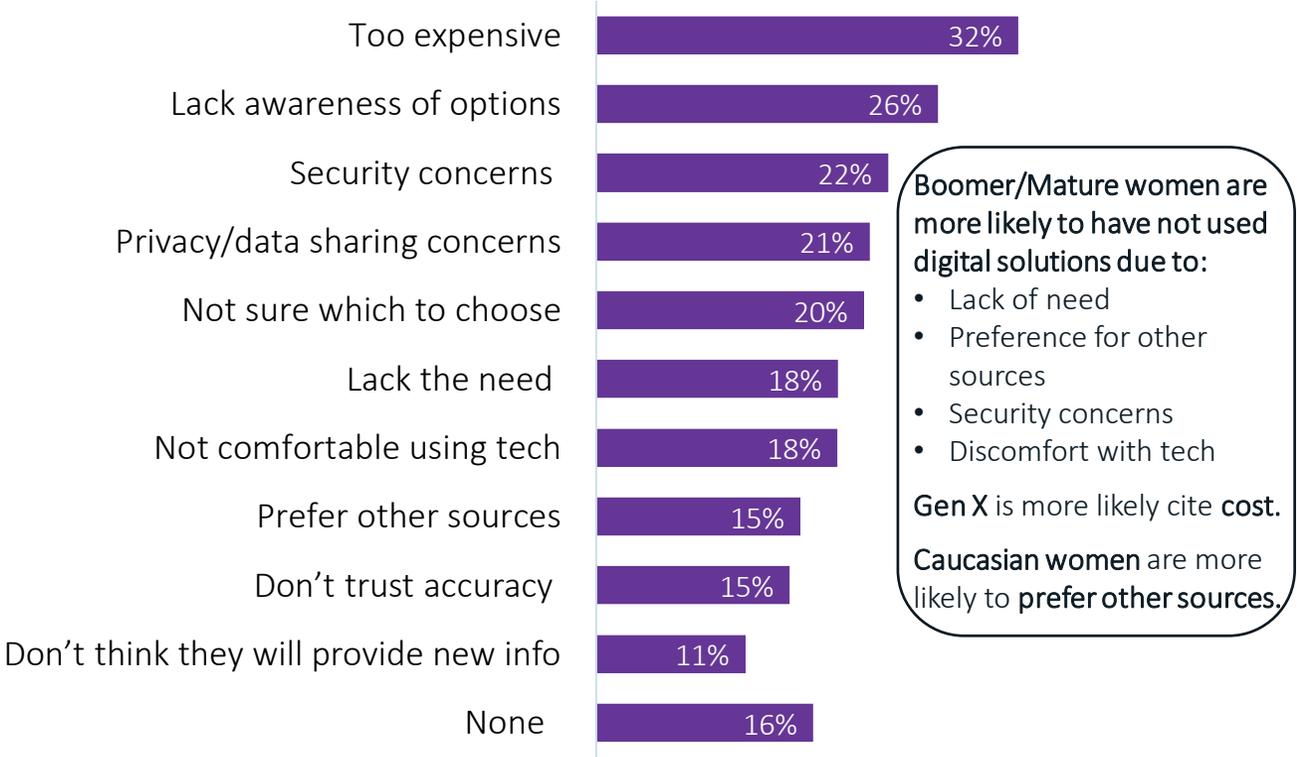
Challenges/Concerns When Using Digital Solutions

% selecting | Responses 10%+ and "none" displayed
Current users | n=456



Reasons Women Have Not Used Digital Health Solutions

% selecting | Top 10 responses and "none" displayed
Non-users | n=394



Q. Have you experienced any of the following challenges or concerns when using digital health solutions?; Q.. Which of the following, if any, are reasons you have not used digital health solutions?

About 3 in 10 stopped using a solution because they felt it was no longer relevant to their needs/life stage, and one-quarter didn't want a subscription

- Current users are more likely to have discontinued use due to a lack of new information or personalization.

Reasons Women Stopped Using a Digital Health Solution

% selecting | Top 10 responses and "none of the above" displayed

Among women who stopped using one or more digital health solutions | n=465

		Current user (n=314)	Previous user (n=151)
No longer relevant to needs/life stage	28%	30%	23%
Didn't want to commit to subscription	23%	21%	25%
Too expensive	17%	18%	15%
Didn't feel it was having positive impact	16%	18%	13%
Did not provide enough new information	12%	14%▲	7%
Not personalized enough	11%	13%▲	6%
Privacy/data sharing concerns	9%	8%	10%
Not reliable (i.e., could not trust info)	8%	8%	8%
Security concerns (i.e., data breaches)	8%	9%	6%
Technical issues	7%	8%	6%
None of the above	12%	10%	16%

Reasons women stopped using a digital health solution vary by demographic:

Gen Z women were more likely to feel they could not trust the information.

Millennials and women without health insurance more commonly felt digital solutions were too expensive.

Women with at least a four-year degree were more likely to believe they did not get enough new information.

Women of color more commonly had privacy/data sharing concerns.

Women with chronic conditions were more likely to think digital solutions were not personalized enough or did not provide new information, and they were more likely to have security concerns.

Q. You indicated there is at least one digital health solution that you used in the past but are no longer using. Which of the following, if any, are reasons why you stopped using the digital health solution(s)?

▲ indicates result is significantly higher than the other group.



The future of women’s health technology involves differentiation and requires engagement with diverse communities throughout the care continuum, including the development of technological innovations. The ability for all women to access and afford innovation requires the right incentives in the health care ecosystem, meaning the infrastructure needs to be in place, including appropriate regulatory pathways to bring innovations to market, balanced insurance coverage and reimbursement policies, and more. As we explore innovations in respiratory therapies, digital tools, and systems that manage care outside of the hospital, we must recognize and leverage technology as an enabler of empowering women to take more control of their own care, as well as gather data and derive valuable insights that generate technological advancements to uniquely improve women’s lives.”

- Larissa D’Andrea, global vice president of impact, ResMed

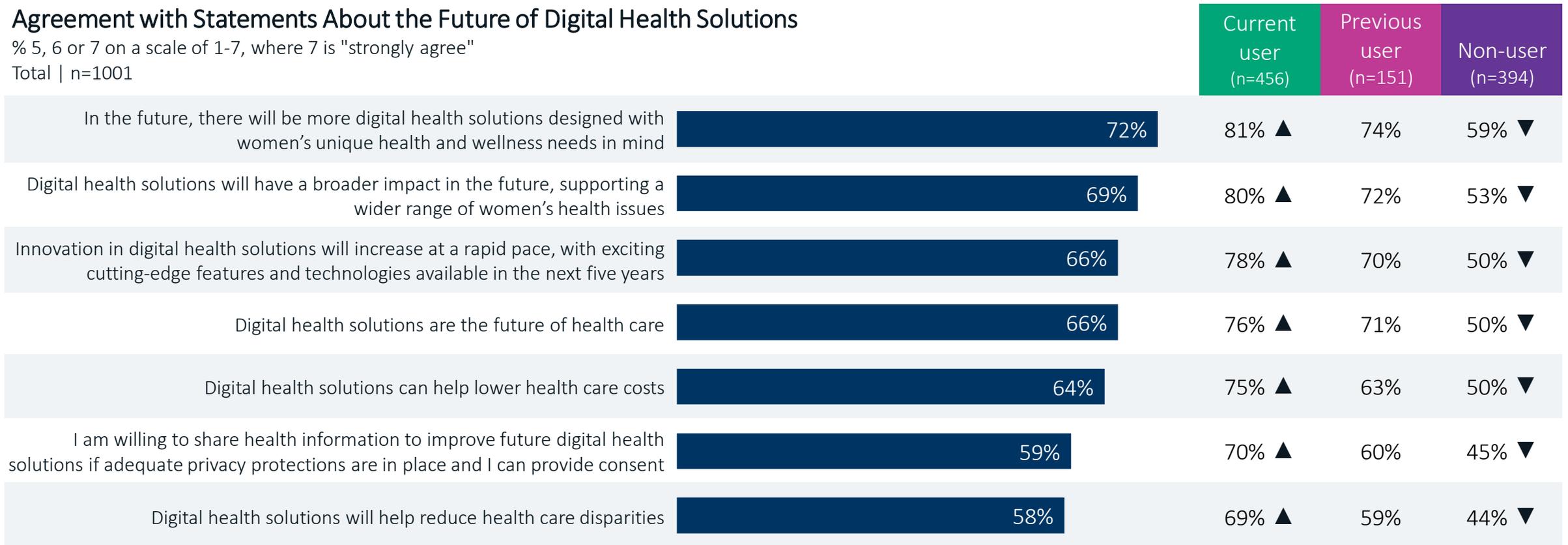
Women, especially current users, are positive about the future of digital health solutions

- Women in high-income households and/or with children living at home are more likely to agree with most statements.

Agreement with Statements About the Future of Digital Health Solutions

% 5, 6 or 7 on a scale of 1-7, where 7 is "strongly agree"

Total | n=1001



Q. Please rate your agreement with the following statements regarding digital health solutions; ▲ ▼ indicates result is significantly higher/lower than the total.

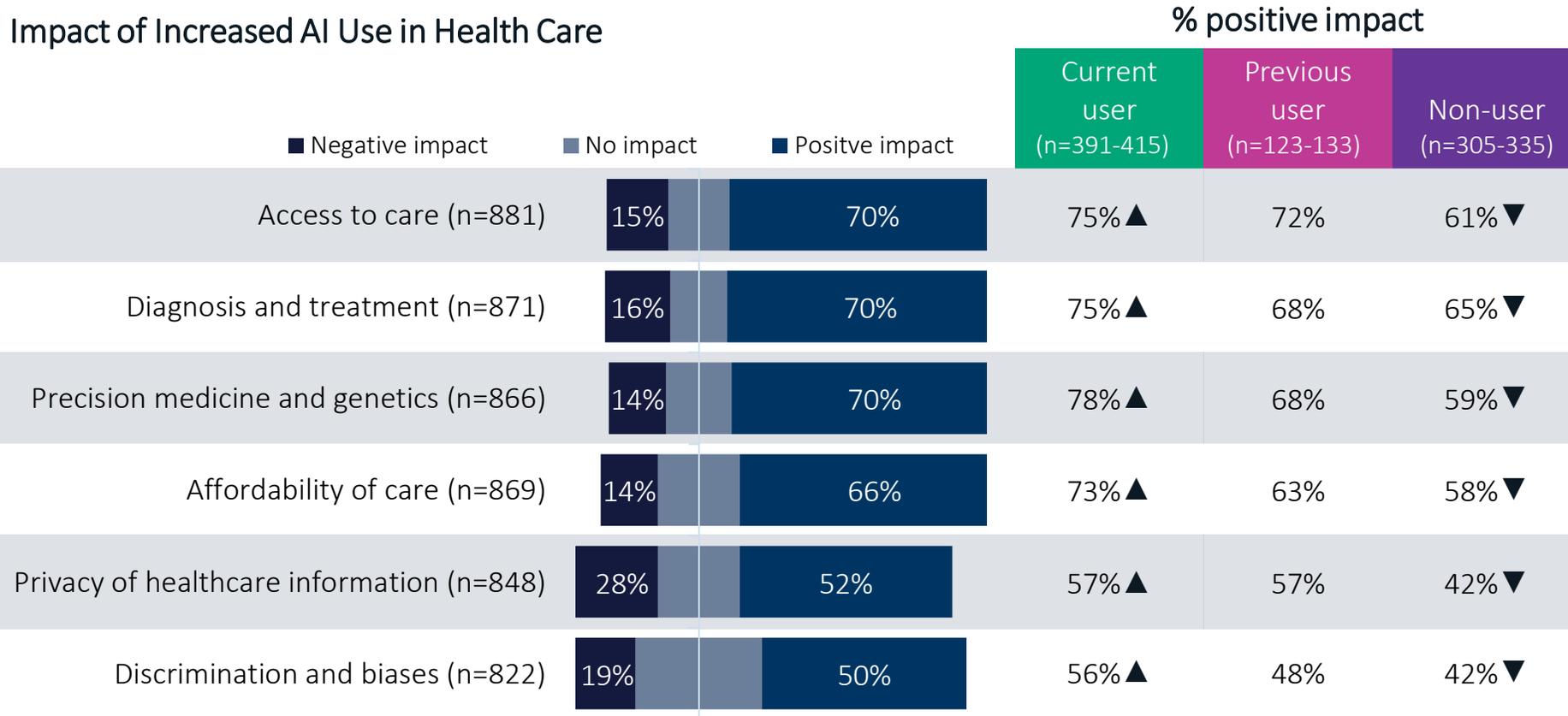


We must be able to bridge the gap between traditional health care settings — like hospitals — and people’s everyday lives, and technology plays a crucial role. ...It will remain imperative for companies like Wisp to leverage their technological platforms in innovative ways to ensure women are still able to safely, conveniently, and affordably receive the care they need.”

- *Monica Cepak, interim CEO, Wisp*

Women tend to feel that greater AI use will be positive for various areas of health care

- However, just over a quarter believe AI will have a negative impact on the privacy of health care information.



Women with **children in the household** are more likely to think increased AI use will have a **positive impact** on **access to care, privacy** and **discrimination/biases**.

Women with household incomes of at least \$100,000 are more likely to think AI will **positively impact diagnosis/treatment, precision medicine and genetics, and discrimination/biases**.

Q. Thinking about the next five years, in your opinion, what impact will increased usage of artificial intelligence (AI) in health care have in each of the following areas?
 NOTE: "Not sure" is excluded from the base; ▲ ▼ indicates result is significantly higher/lower than the total.



7 Health Area Snapshots

Digital Health Solution: Menstrual

Market Snapshot

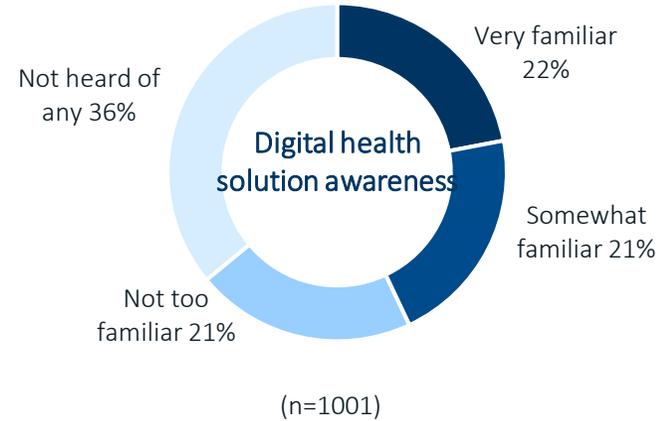


91% of women consider menstrual health to be included under the topic of “women’s health”



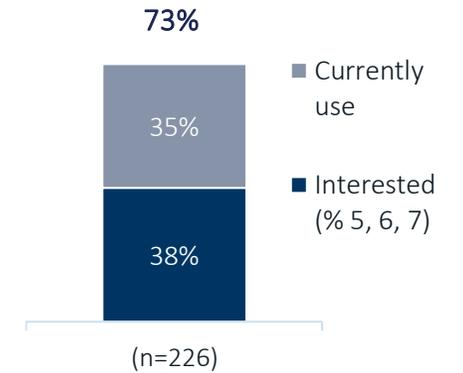
29% of women say menstrual health will be on their mind in the next five years

Menstrual



Potential

(among women for whom menstrual health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	15%
Used >3 months ago	13%
Have never used	71%

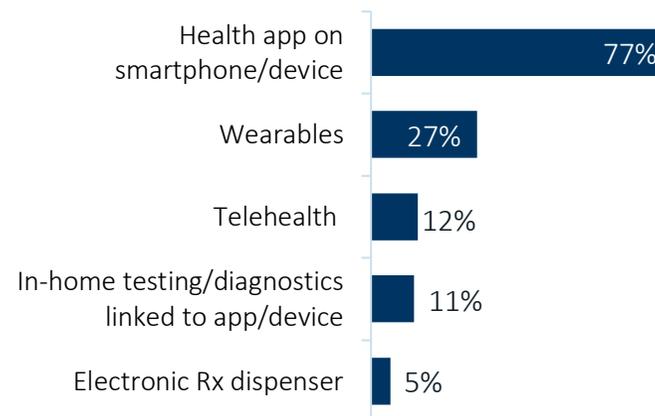
Frequency of use (among users: n=120)

Daily	9%
Multiple times per week	9%
Weekly	12%
Monthly	59%
< Monthly	12%



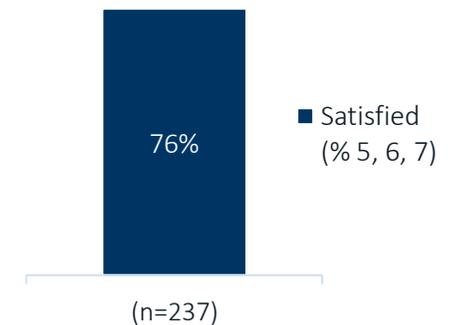
Type of digital solution used

Among those currently using | n=120



Satisfaction

(among current and previous users of menstrual digital health solutions)



Digital Health Solution: Sexual

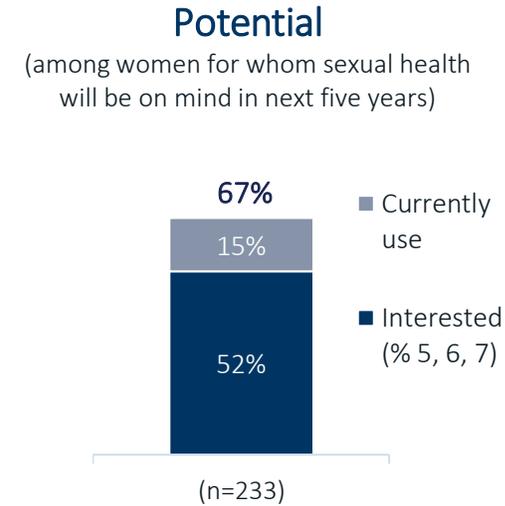
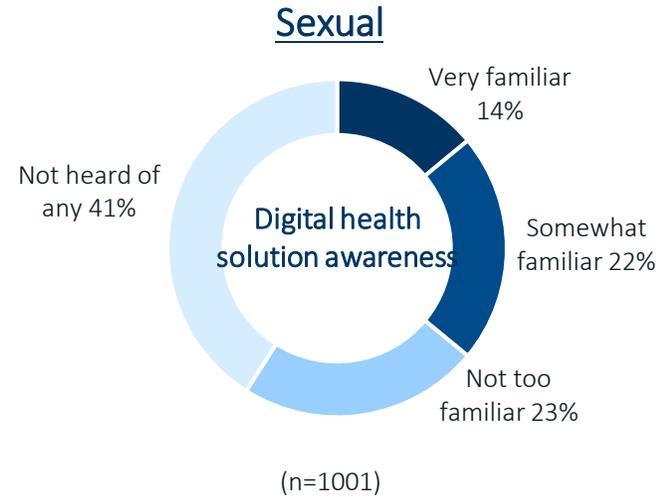
Market Snapshot



86% of women consider sexual health to be included under the topic of "women's health"



28% of women say sexual health will be on their mind in the next five years



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	6%
Used >3 months ago	10%
Have never used	84%

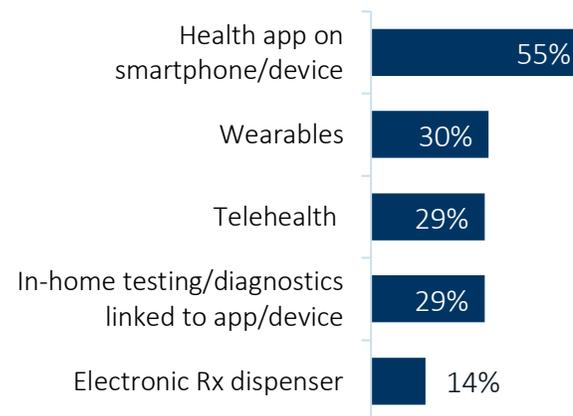
Frequency of use (among users: n=41)

Daily	16%
Multiple times per week	8%
Weekly	23%
Monthly	28%
< Monthly	25%



Type of digital solution used

Among those currently using | n=41



Digital Health Solution: Prenatal

Market Snapshot

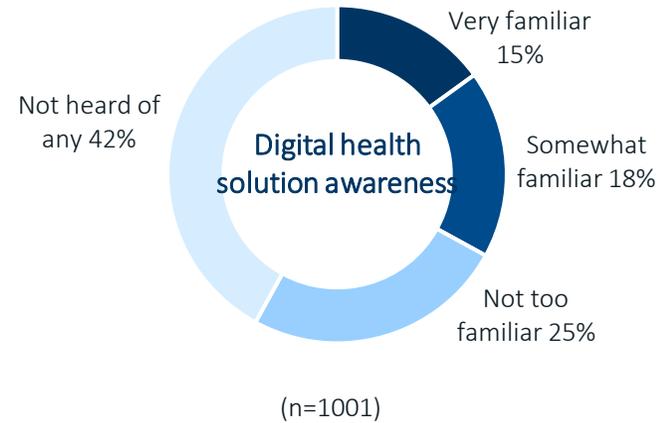


87% of women consider prenatal health to be included under the topic of "women's health"



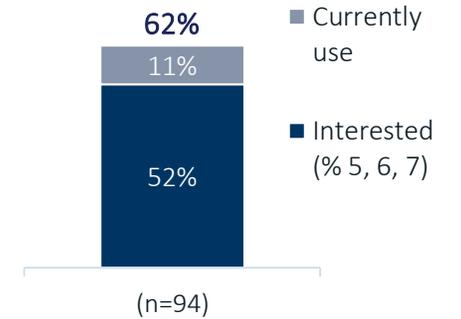
13% of women say prenatal health will be on their mind in the next five years

Prenatal



Potential

(among women for whom prenatal health will be on mind in next five years)



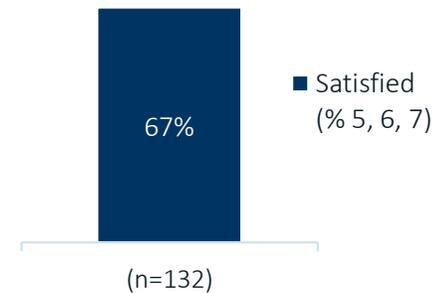
Usage Snapshot*

Digital solution usage (n=1001)

Used in past 3 months	3%
Used >3 months ago	12%
Have never used	85%

Satisfaction

(among current and previous users of prenatal digital health solutions)



*Tables/charts excluded due to small base size (n<30).

Digital Health Solution: Post-Natal

Market Snapshot

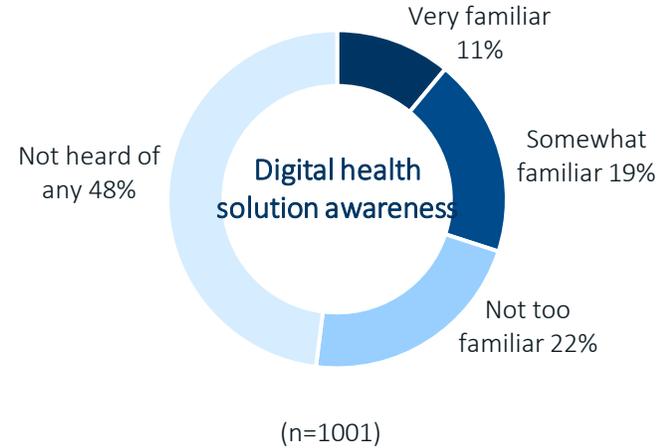


84% of women consider post-natal health to be included under the topic of "women's health"



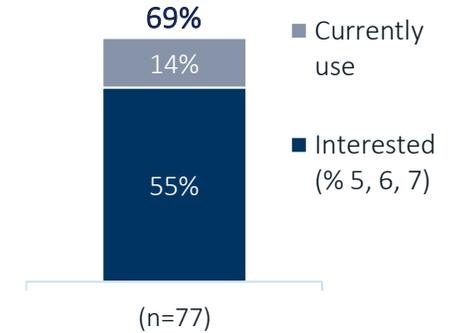
10% of women say post-natal health will be on their mind in the next five years

Post-natal



Potential

(among women for whom post-natal health will be on mind in next five years)



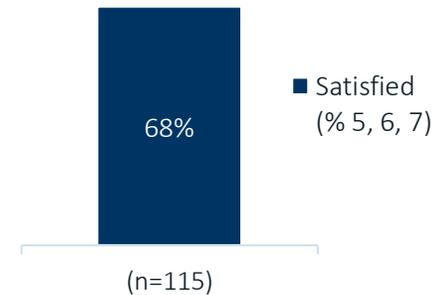
Usage Snapshot*

Digital solution usage (n=1001)

Used in past 3 months	2%
Used >3 months ago	11%
Have never used	87%

Satisfaction

(among current and previous users of post-natal digital health solutions)



*Tables/charts excluded due to small base size (n<30).

Digital Health Solution: Mental/Emotional/Cognitive

Market Snapshot

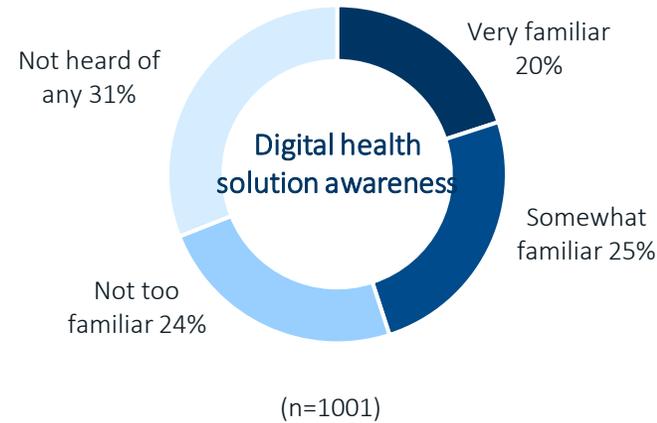


70% of women consider mental health to be included under the topic of "women's health"



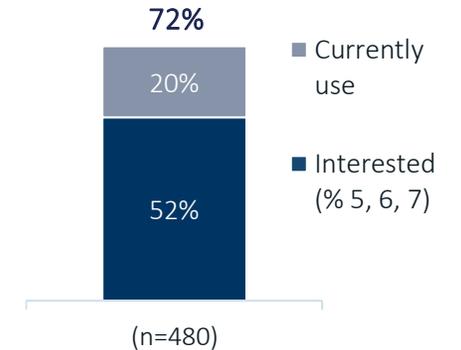
49% of women say mental health will be on their mind in the next five years

Mental



Potential

(among women for whom mental health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	13%
Used >3 months ago	14%
Have never used	73%

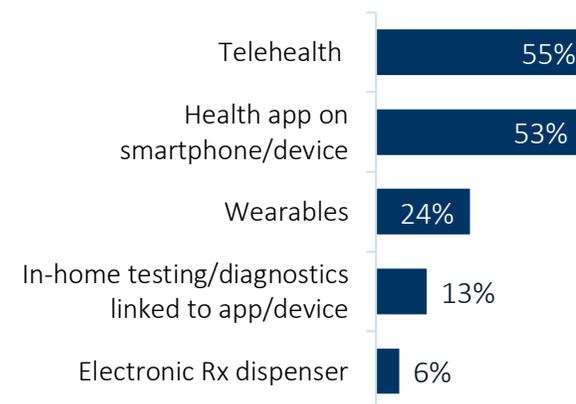
Frequency of use (among users: n=114)

Daily	21%
Multiple times per week	27%
Weekly	20%
Monthly	21%
< Monthly	11%



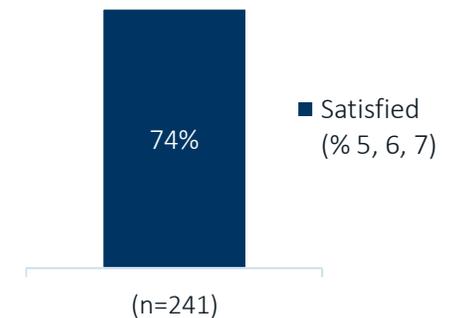
Type of digital solution used

Among those currently using | n=114



Satisfaction

(among current and previous users of mental health digital health solutions)



Digital Health Solution: Bone

Market Snapshot

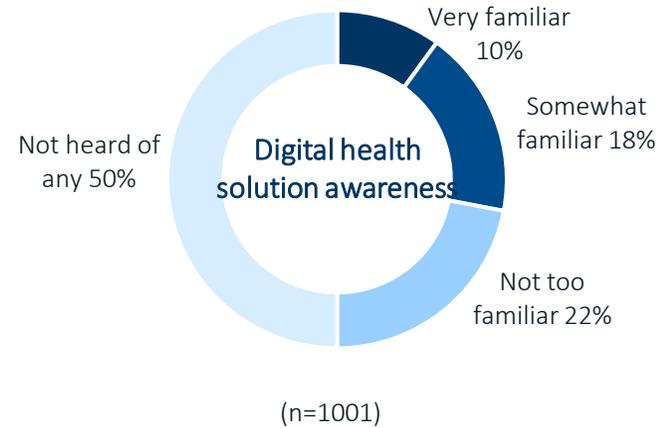


62% of women consider bone health to be included under the topic of "women's health"



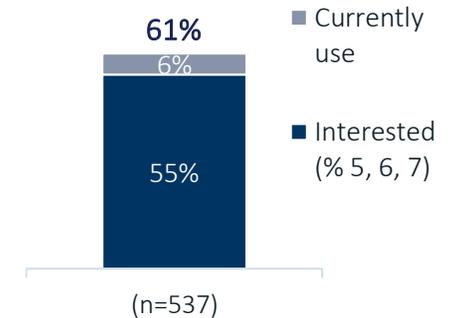
48% of women say bone health will be on their mind in the next five years

Bone



Potential

(among women for whom bone health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	4%
Used >3 months ago	7%
Have never used	89%

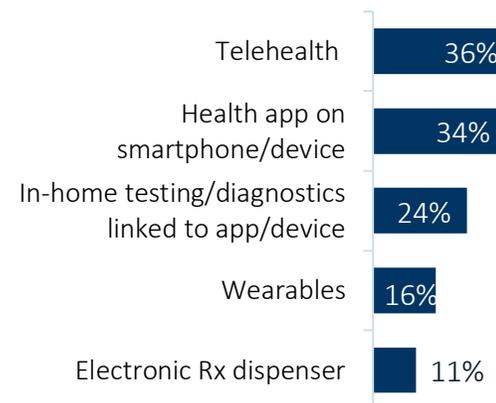
Frequency of use (among users: n=44)

Daily	23%
Multiple times per week	5%
Weekly	9%
Monthly	22%
< Monthly	42%



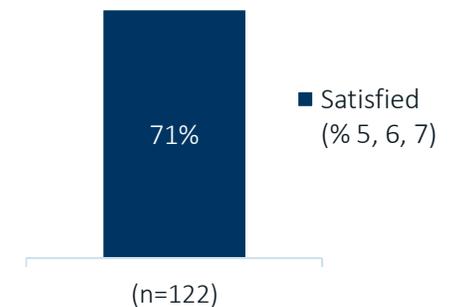
Type of digital solution used

Among those currently using | n=44



Satisfaction

(among current and previous users of bone digital health solutions)



Digital Health Solution: Pre-Menopause/Menopause

Market Snapshot

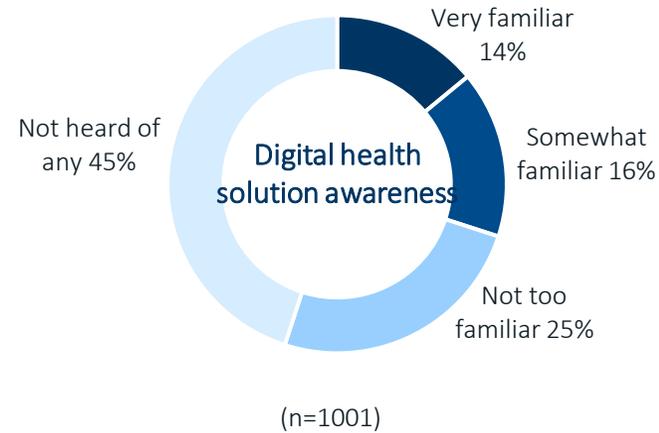


88% of women consider menopause to be included under the topic of "women's health"



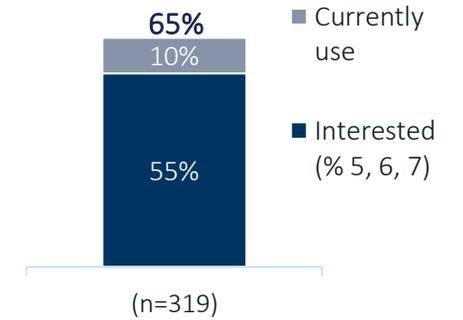
32% of women say menopause will be on their mind in the next five years

Menopause



Potential

(among women for whom menopause will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	4%
Used >3 months ago	9%
Have never used	87%

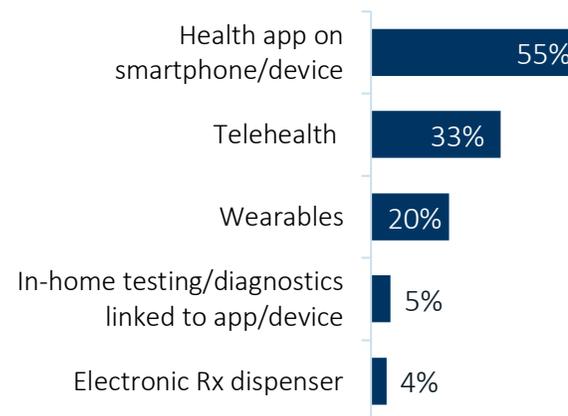
Frequency of use (among users: n=40)

Daily	10%
Multiple times per week	20%
Weekly	10%
Monthly	34%
< Monthly	27%



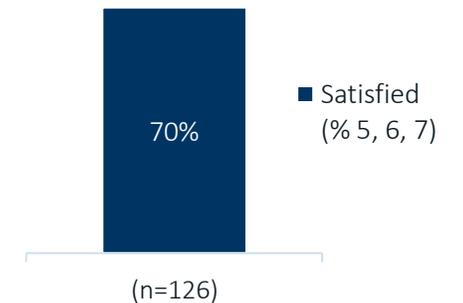
Type of digital solution used

Among those currently using | n=40



Satisfaction

(among current and previous users of menopause digital health solutions)



Digital Health Solution: Cardiovascular

Market Snapshot

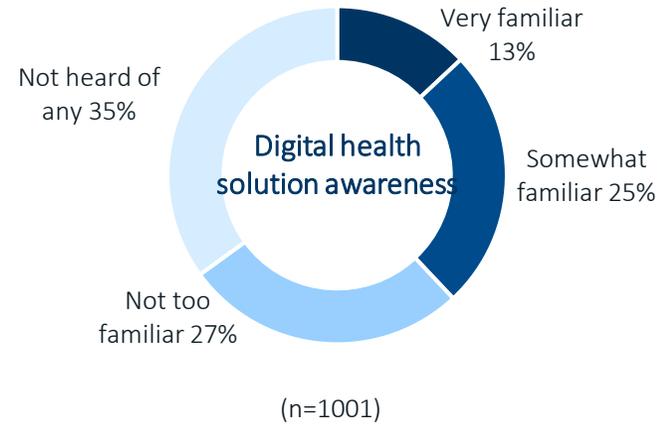


52% of women consider cardiovascular health to be included under the topic of "women's health"



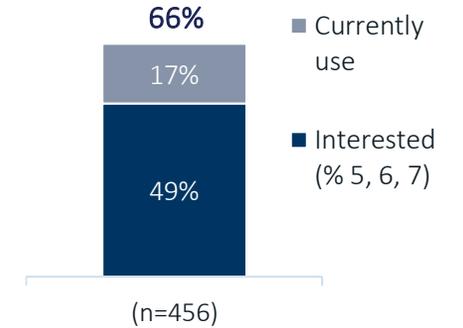
41% of women say cardiovascular health will be on their mind in the next five years

Cardiovascular



Potential

(among women for whom cardiovascular health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	10%
Used >3 months ago	9%
Have never used	81%

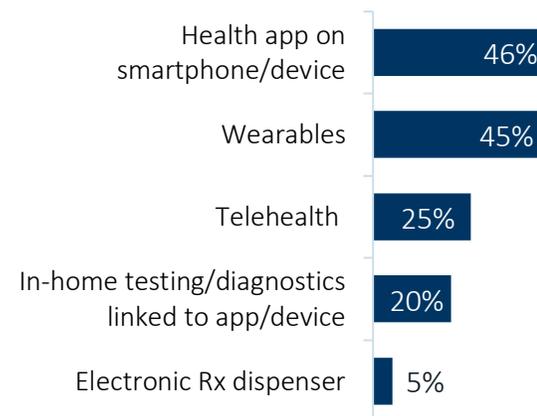
Frequency of use (among users: n=106)

Daily	42%
Multiple times per week	14%
Weekly	11%
Monthly	14%
< Monthly	20%



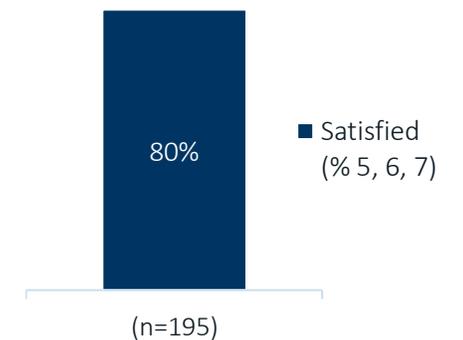
Type of digital solution used

Among those currently using | n=106



Satisfaction

(among current and previous users of cardiovascular digital health solutions)



Digital Health Solution: Pulmonary

Market Snapshot

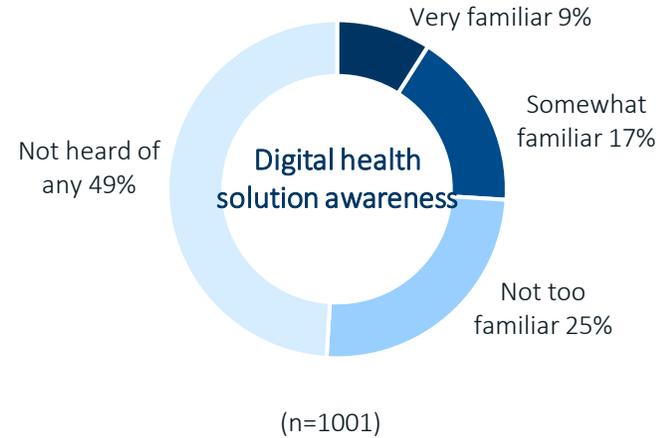


41% of women consider pulmonary health to be included under the topic of "women's health"



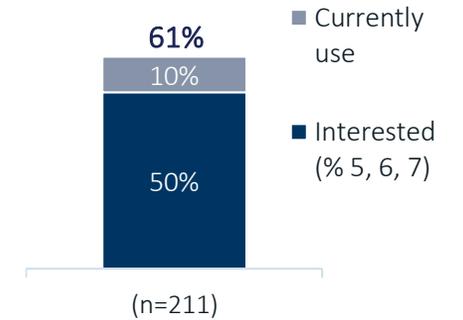
20% of women say pulmonary health will be on their mind in the next five years

Pulmonary



Potential

(among women for whom pulmonary health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	4%
Used >3 months ago	6%
Have never used	90%

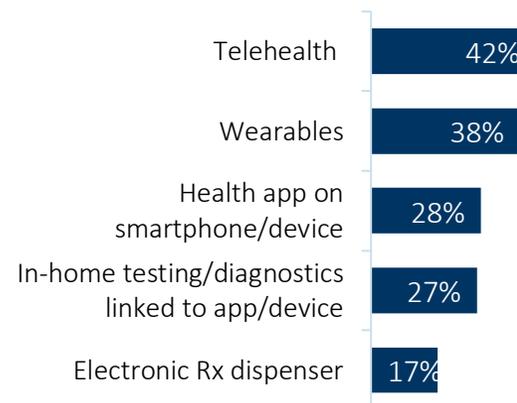
Frequency of use (among users: n=40)

Daily	33%
Multiple times per week	13%
Weekly	15%
Monthly	14%
< Monthly	26%



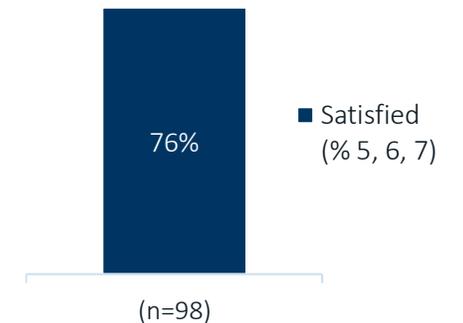
Type of digital solution used

Among those currently using | n=40



Satisfaction

(among current and previous users of pulmonary digital health solutions)



Digital Health Solution: Oncological

Market Snapshot

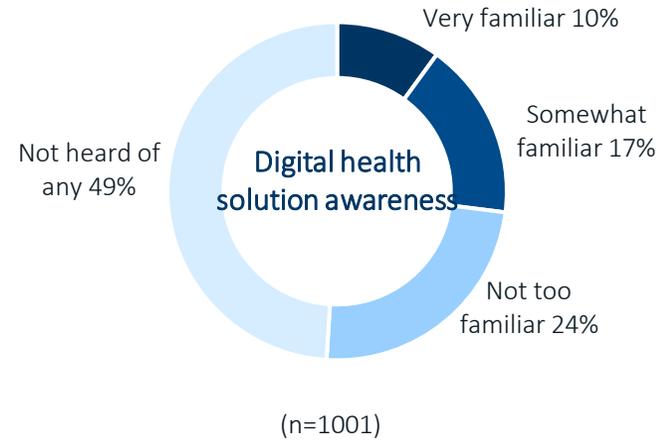


77% of women consider oncological health to be included under the topic of "women's health"



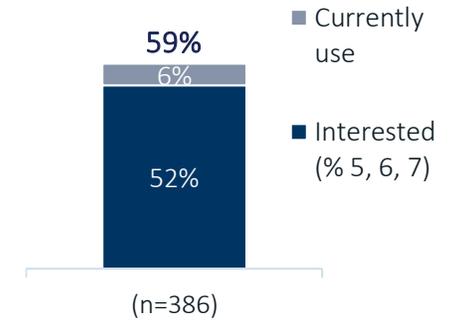
37% of women say oncological health will be on their mind in the next five years

Oncological



Potential

(among women for whom oncological health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	4%
Used >3 months ago	6%
Have never used	90%

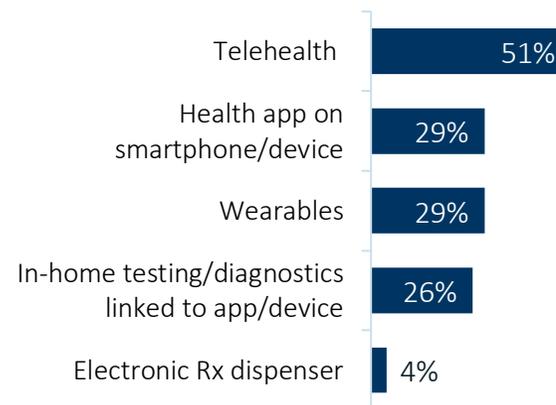
Frequency of use (among users: n=39)

Daily	8%
Multiple times per week	0%
Weekly	17%
Monthly	10%
< Monthly	66%



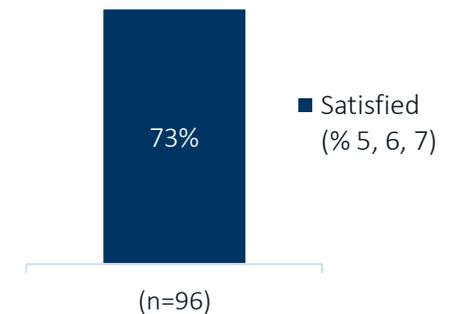
Type of digital solution used

Among those currently using | n=39



Satisfaction

(among current and previous users of oncological digital health solutions)



Digital Health Solution: Autoimmune

Market Snapshot

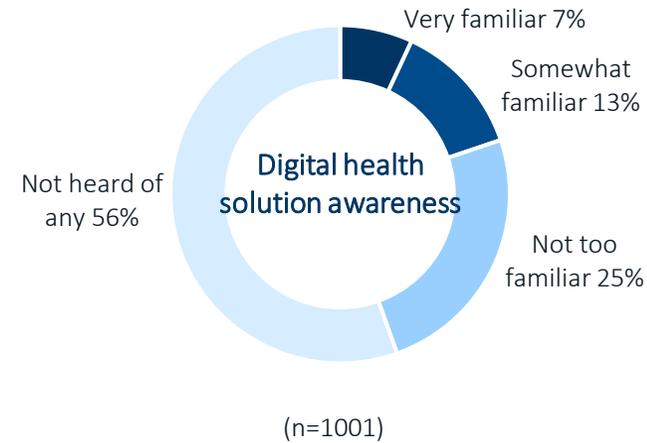


44% of women consider autoimmune health to be included under the topic of "women's health"



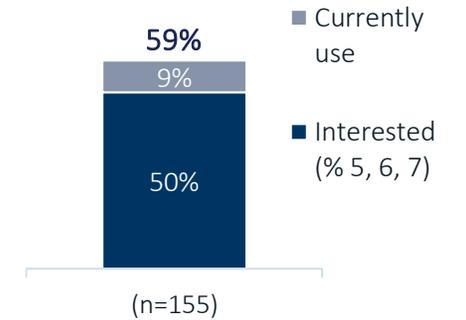
15% of women say autoimmune health will be on their mind in the next five years

Autoimmune



Potential

(among women for whom autoimmune health will be on mind in next five years)



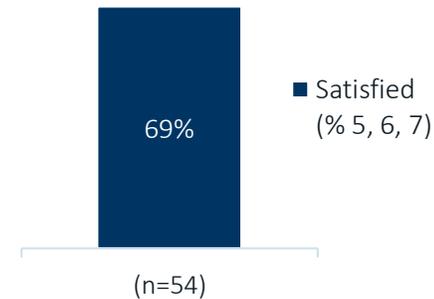
Usage Snapshot*

Digital solution usage (n=1001)

Used in past 3 months	3%
Used >3 months ago	3%
Have never used	95%

Satisfaction

(among current and previous users of autoimmune digital health solutions)



*Tables/charts excluded due to small base size (n<30).

Digital Health Solution: Vaginal

Market Snapshot

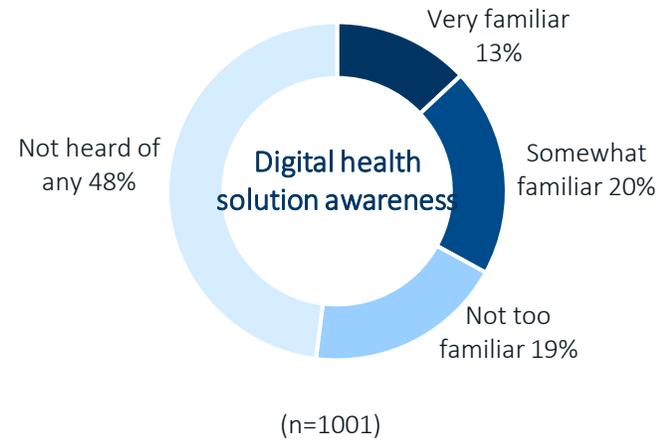


90% of women consider vaginal health to be included under the topic of "women's health"



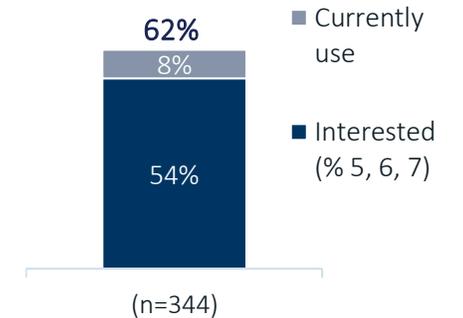
37% of women say vaginal health will be on their mind in the next five years

Vaginal



Potential

(among women for whom vaginal health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	4%
Used >3 months ago	13%
Have never used	82%

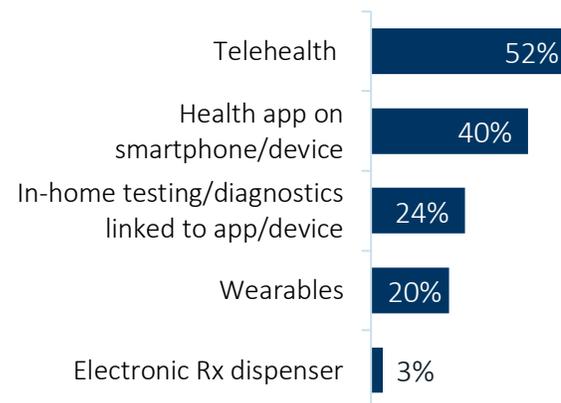
Frequency of use (among users: n=40)

Daily	8%
Multiple times per week	13%
Weekly	18%
Monthly	20%
< Monthly	42%



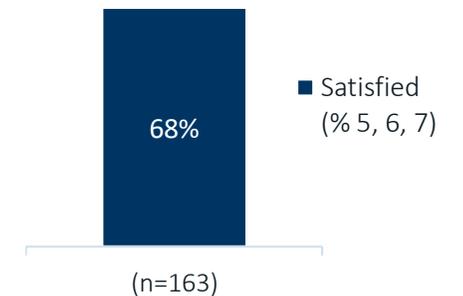
Type of digital solution used

Among those currently using | n=40



Satisfaction

(among current and previous users of vaginal digital health solutions)



Digital Health Solution: Hormonal/Endocrine

Market Snapshot

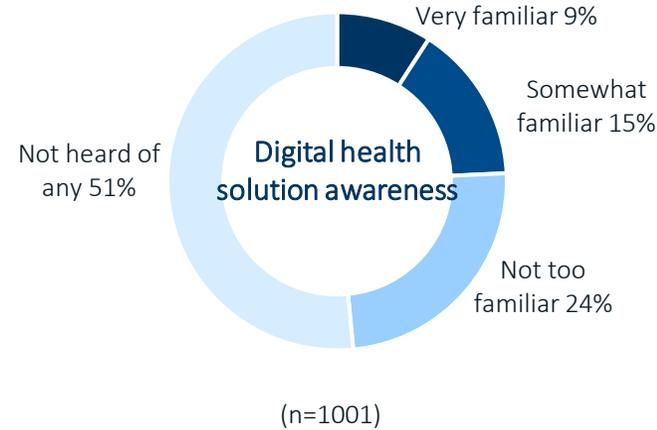


83% of women consider hormonal/endocrine health to be included under the topic of "women's health"



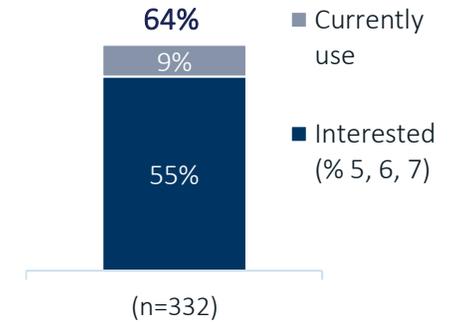
35% of women say hormonal/endocrine health will be on their mind in the next five years

Hormonal/Endocrine



Potential

(among women for whom hormonal/endocrine health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	5%
Used >3 months ago	6%
Have never used	89%

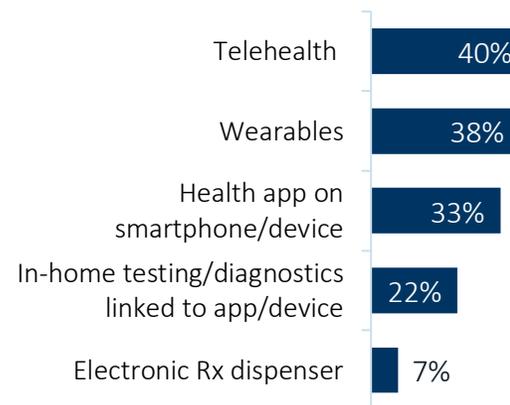
Frequency of use (among users: n=40)

Daily	22%
Multiple times per week	9%
Weekly	22%
Monthly	16%
< Monthly	31%



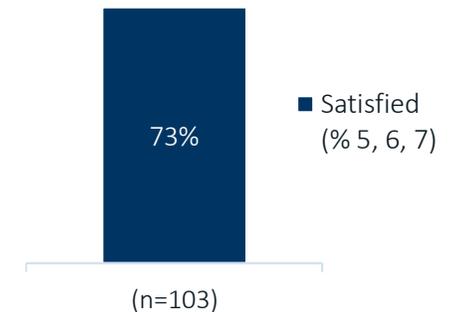
Type of digital solution used

Among those currently using | n=40



Satisfaction

(among current and previous users of hormonal/endocrine digital health solutions)



Digital Health Solution: Bladder

Market Snapshot

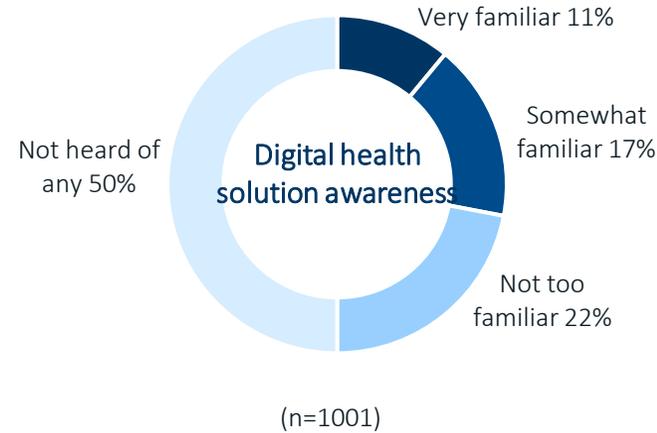


66% of women consider bladder health to be included under the topic of "women's health"



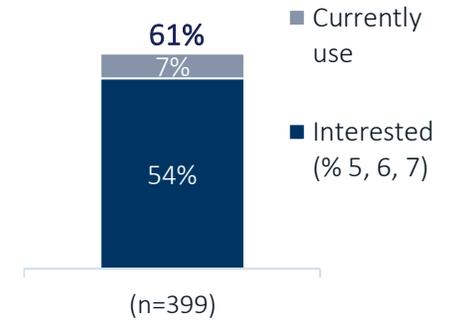
37% of women say bladder health will be on their mind in the next five years

Bladder



Potential

(among women for whom bladder health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	5%
Used >3 months ago	10%
Have never used	85%

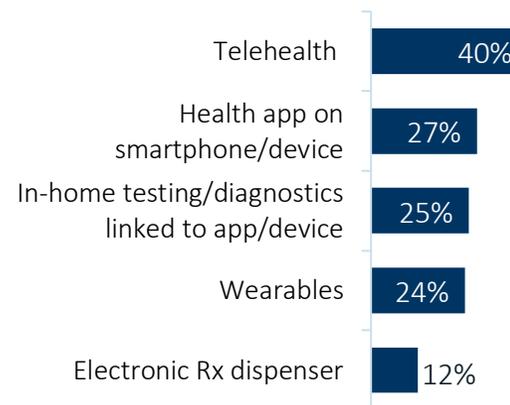
Frequency of use (among users: n=49)

Daily	11%
Multiple times per week	18%
Weekly	26%
Monthly	4%
< Monthly	42%



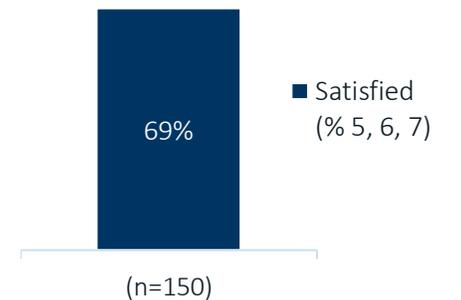
Type of digital solution used

Among those currently using | n=49



Satisfaction

(among current and previous users of bladder digital health solutions)



Digital Health Solution: Nutrition

Market Snapshot

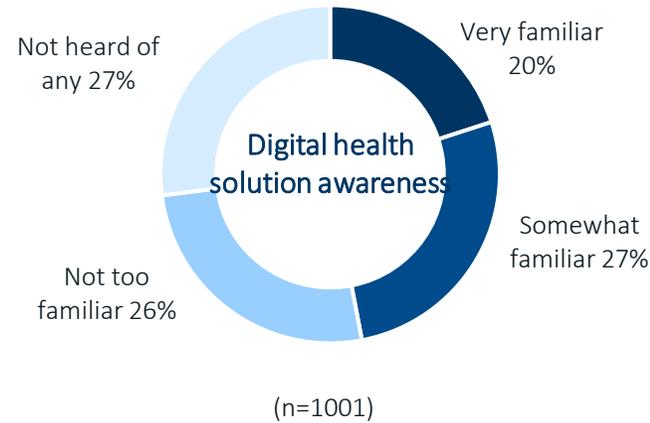


65% of women consider nutrition to be included under the topic of "women's health"



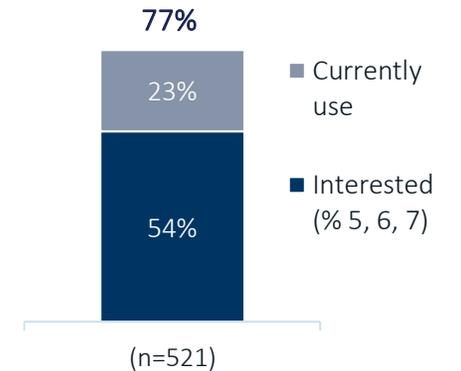
51% of women say nutrition will be on their mind in the next five years

Nutrition



Potential

(among women for whom nutrition health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	18%
Used >3 months ago	15%
Have never used	67%

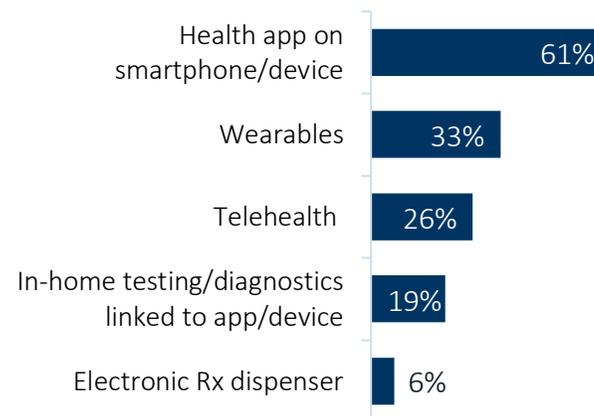
Frequency of use (among users: n=165)

Daily	41%
Multiple times per week	30%
Weekly	9%
Monthly	7%
< Monthly	12%



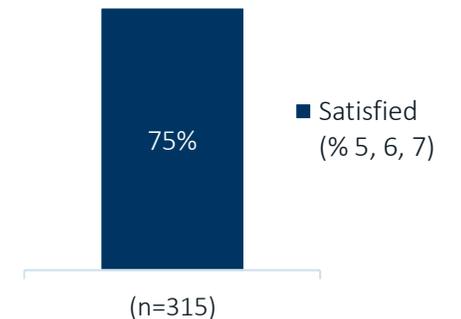
Type of digital solution used

Among those currently using | n=165



Satisfaction

(among current and previous users of nutrition digital health solutions)



Digital Health Solution: Neurological

Market Snapshot

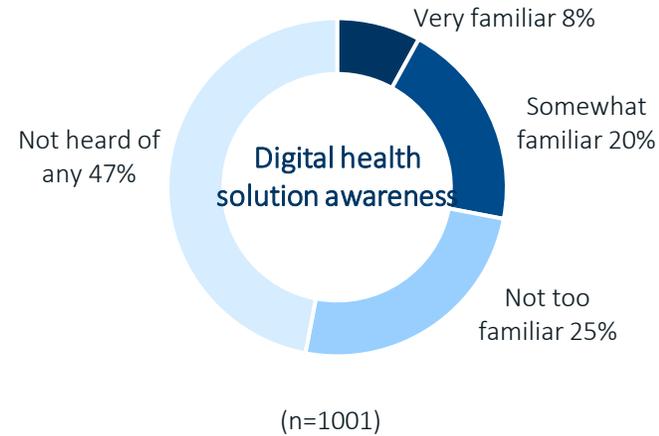


46% of women consider neurological health to be included under the topic of "women's health"



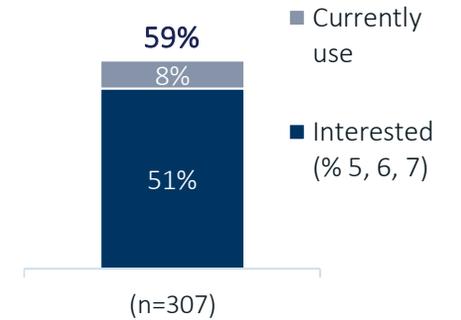
28% of women say neurological health will be on their mind in the next five years

Neurological



Potential

(among women for whom neurological health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	4%
Used >3 months ago	7%
Have never used	89%

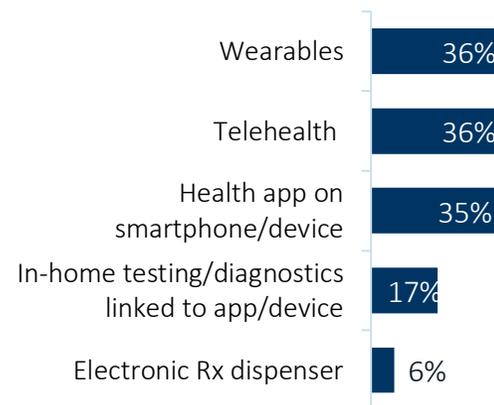
Frequency of use (among users: n=45)

Daily	17%
Multiple times per week	7%
Weekly	14%
Monthly	24%
< Monthly	37%



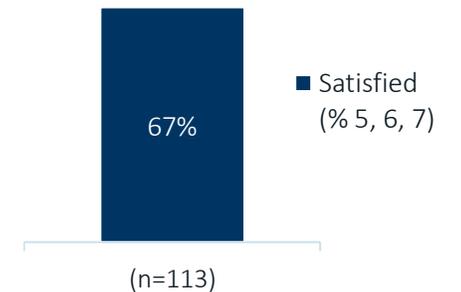
Type of digital solution used

Among those currently using | n=45



Satisfaction

(among current and previous users of neurological digital health solutions)



Digital Health Solution: Dermatological

Market Snapshot

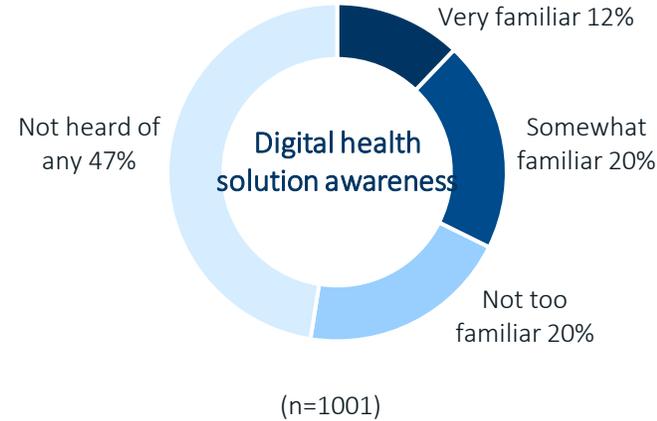


53% of women consider dermatological health to be included under the topic of "women's health"



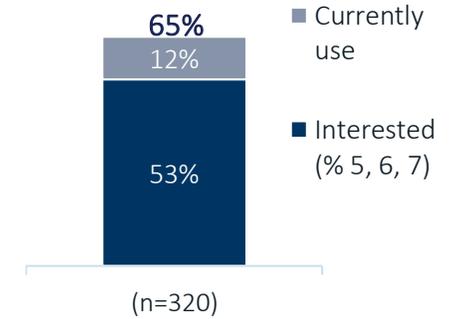
31% of women say dermatological health will be on their mind in the next five years

Dermatological



Potential

(among women for whom dermatological health will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	7%
Used >3 months ago	9%
Have never used	84%

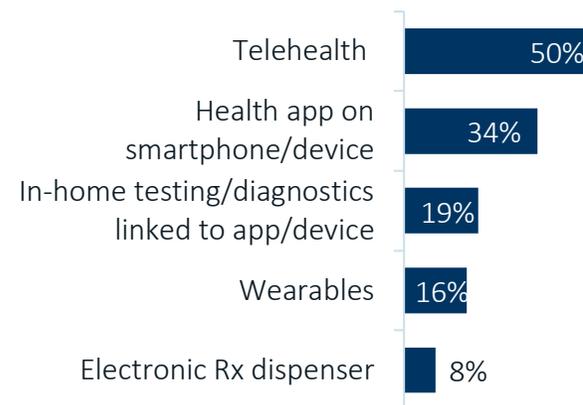
Frequency of use (among users: n=67)

Daily	9%
Multiple times per week	16%
Weekly	12%
Monthly	29%
< Monthly	34%



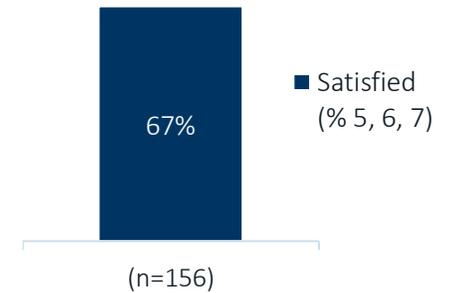
Type of digital solution used

Among those currently using | n=67



Satisfaction

(among current and previous users of dermatological digital health solutions)



Digital Health Solution: Fitness

Market Snapshot

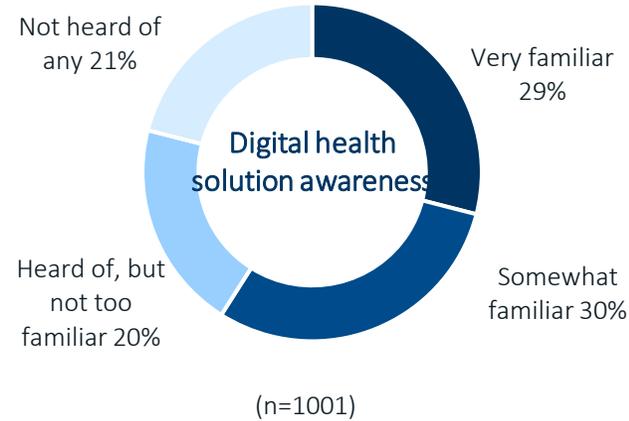


59% of women consider fitness to be included under the topic of "women's health"



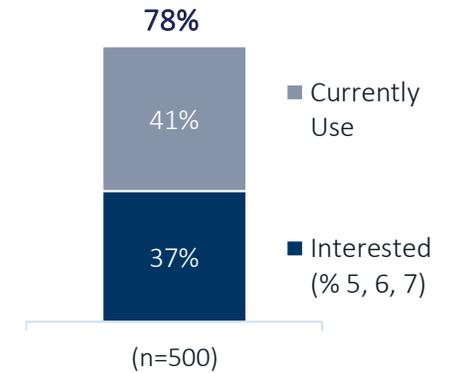
48% of women say fitness will be on their mind in the next five years

Fitness



Potential

(among women for whom fitness will be on mind in next five years)



Usage Snapshot

Digital solution usage (n=1001)

Used in past 3 months	31%
Used >3 months ago	17%
Have never used	52%

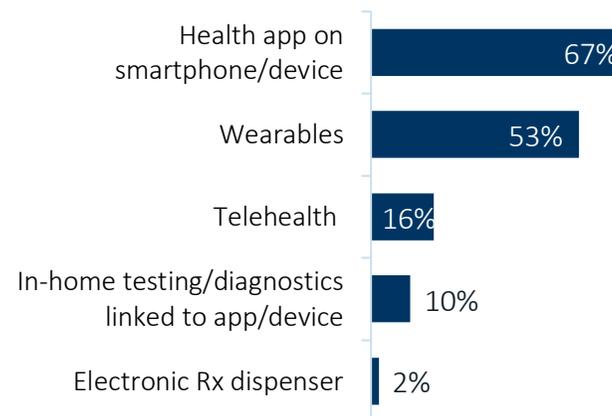
Frequency of use (among users; n=302)

Daily	49%
Multiple times per week	27%
Weekly	12%
Monthly	5%
< Monthly	7%



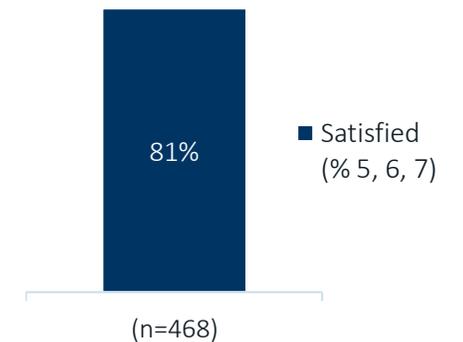
Type of digital solution used

Among those currently using | n=302



Satisfaction

(among current and previous users of fitness digital health solutions)





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About CTA Research

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9 Appendix

Women's Consumer Digital Health Solutions

“Women’s consumer digital health solutions” refers to software, diagnostics, products and services that use technology to focus on women’s health and wellness. Some examples of women’s consumer digital health solutions include:

- Health app on a smartphone or smart device (e.g., smartwatch, smart TV, tablet)
- In-home testing/diagnostics linked to an app or device that can assist medical providers with updating electronic health records (e.g., tests for COVID, flu, pregnancy, fertility)
- Wearable devices (e.g., watches, wristbands, armbands, rings)
- Wearable patches (e.g., to measure blood pressure, glucose, heart rate)
- Headsets or eyewear (i.e., virtual reality headsets used to manage or improve health/wellness)
- Electronic medication dispensers (i.e., automatic dispensers that help organize, schedule and deliver medication)

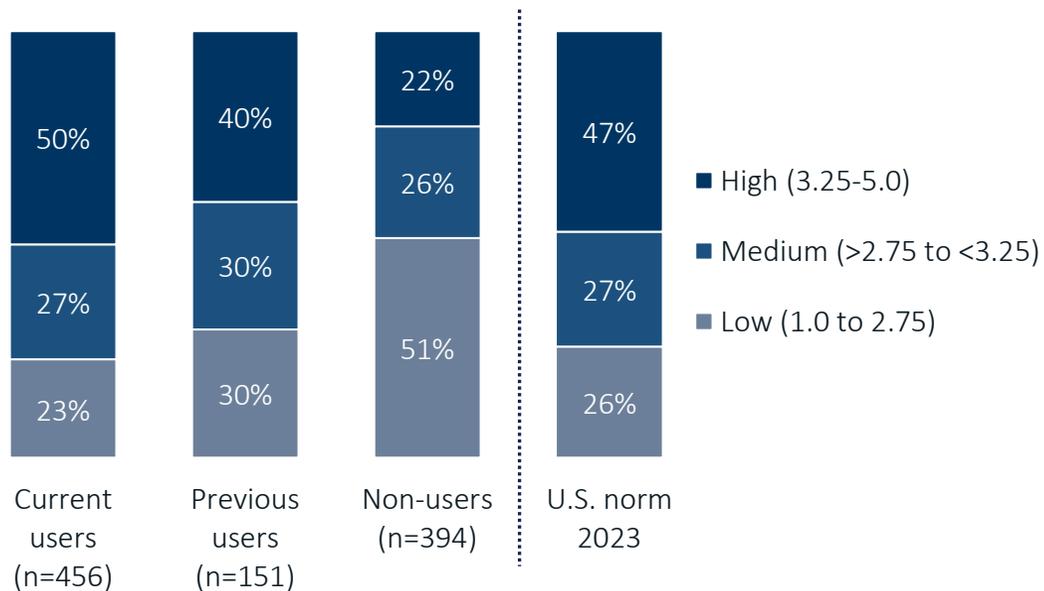
Health Areas Assessed	
Menstrual	Menstrual cycle tracking, premenstrual syndrome, etc.
Sexual	Fertility, reproduction, sexually transmitted infections, etc.
Prenatal	Pregnancy, gestational diabetes, etc.
Post-natal	Breastfeeding, postpartum depression or anxiety, etc.
Mental/emotional/cognitive	Stress management, depression, anxiety, addiction, eating disorders, etc.
Bone	Osteoporosis, low bone density, etc.
Pre-menopause/menopause	Hot flashes, mood changes, etc.
Cardiovascular	Heart disease, arrhythmia, high blood pressure, etc.
Pulmonary	Asthma, chronic obstructive pulmonary disease (COPD), etc.
Oncological	Breast cancer, lung cancer, cervical cancer, ovarian cancer, etc.
Autoimmune	Alopecia, psoriasis, lupus, etc.
Vaginal	Pelvic floor, yeast infections, etc.
Hormonal/endocrine	Polycystic ovary syndrome (PCOS), thyroid, pituitary gland, etc.
Bladder	Bladder infections, overactive bladder, urinary incontinence, etc.
Nutrition	Diabetes management, weight management, lactose intolerance, vitamin and mineral deficiencies, iron-deficiency anemia, etc.
Neurological	Hearing loss, migraines, multiple sclerosis, stroke, etc.
Dermatological	Skin changes, ulcers, eczema, skin cancer, etc.
Fitness	Exercise, physical activity, etc.

Half of current users and 2 in 5 previous users are highly techno-ready; non-users are less tech-savvy

- Most previous users are "skeptics," while non-users are most commonly "avoiders."

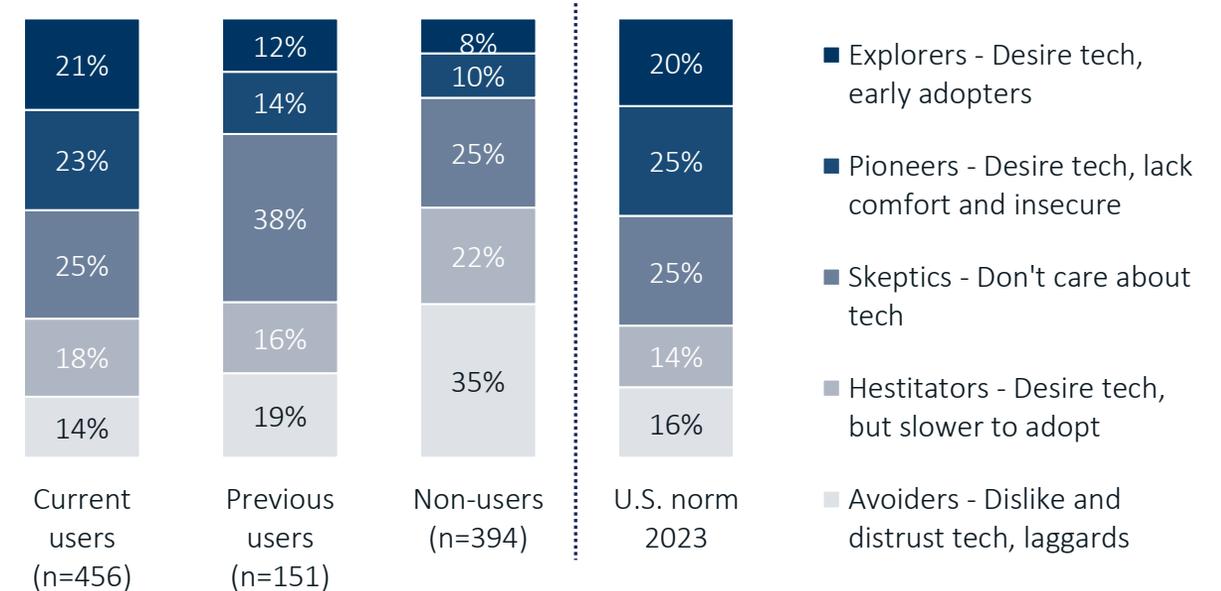
Techno-Readiness (TR)

Propensity to adopt and embrace technology



TechQual® Segments

A measure of people's beliefs about technology



Estimating Importance of Considerations

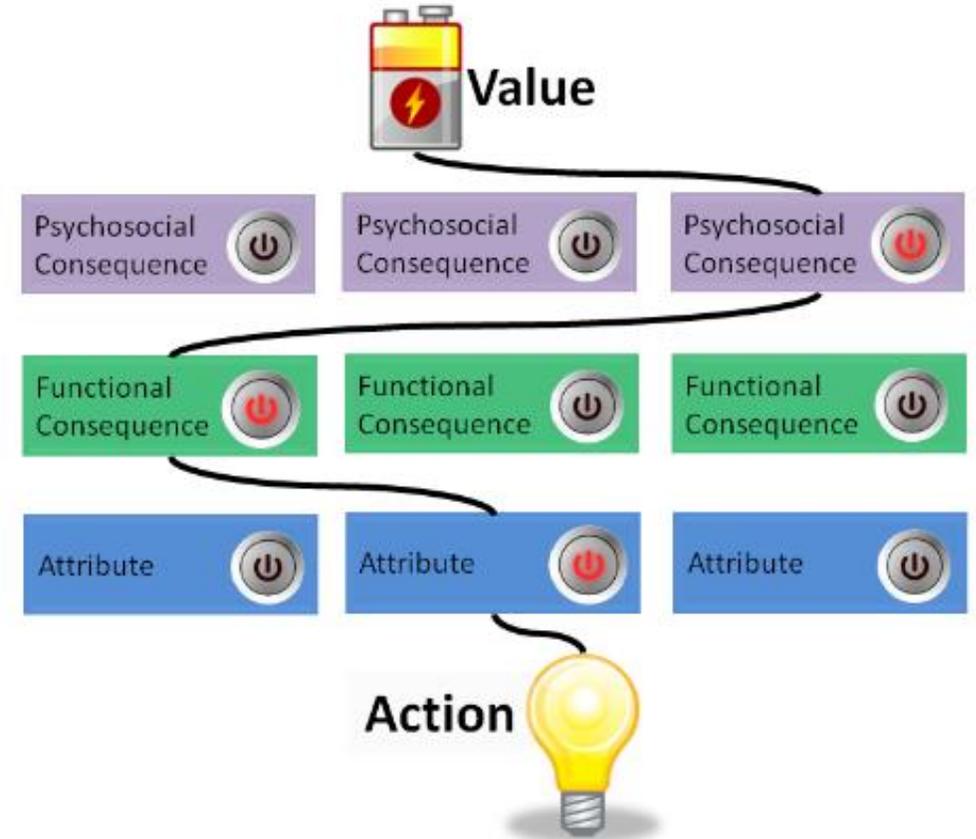
This study assessed 22 considerations for women deciding whether to start using a digital solution to manage their health. Consideration importance was calculated to understand the key drivers of digital solution adoption.

MaxVal™ Indexed Importance Scores: Women were asked to indicate how important considerations were (not too, somewhat, very) and rank them in importance. The rankings were then converted into MaxVal™ scores, which are precise measures of utility.

- The initial MaxVal™ scores were calculated so that the importance for each consideration ranged from 0 to 100, with the importance of all 22 considerations summing to 100. The calculations have a level of precision that allows for comparing them based on order of magnitude. For example, if a score for one feature is 2.5 and another 5.0, it can be stated the second is twice as important as the first.
- A group of considerations can be added to determine the total percentage of potential importance accounted for out of the set of 22.
- For ease of interpretation, the importance ratings are then standardized so that a score of 100 is average across the 22 features; a score less than 100 means less than average, and a score greater than 100 means more than average.

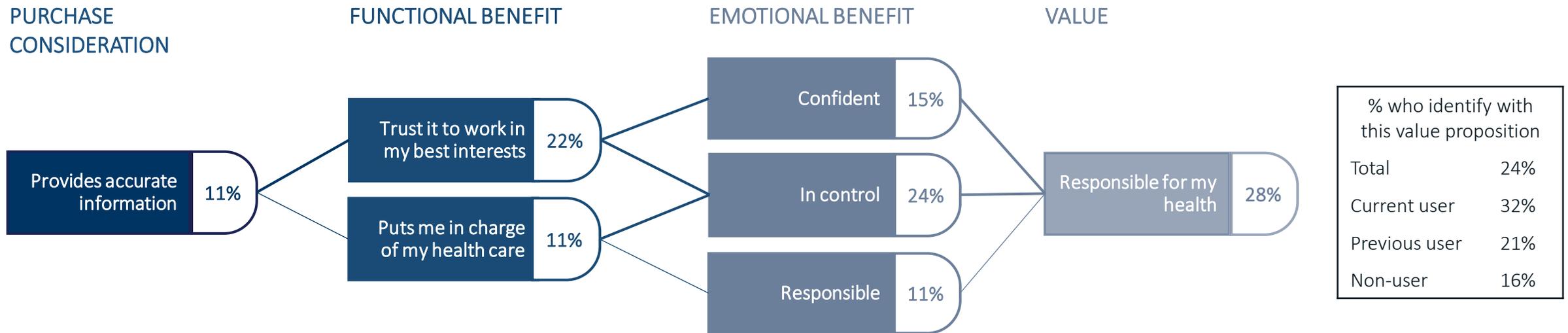
Identifying Value Propositions for Digital Health Solution Adoption

- Women were asked a series of questions to understand their motivations for adopting digital health solutions.
- The questions sought to explain their decisions in terms of a chain of benefits that tie a key adoption consideration to an adoption rationale (functional benefit), an adoption rationale to desired emotional needs (psychosocial benefit) and an emotional need to a higher-level value orientation.
- The value propositions that result from this analysis can be used to guide future marketing for women's digital health solutions, as the value propositions uncovered have been proven to link to behavior.



"Control my health" is a common value proposition, especially for current users

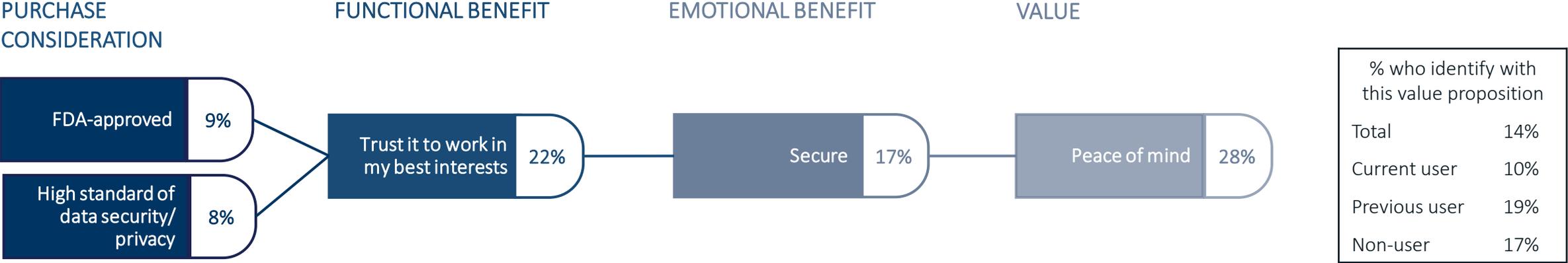
"CONTROL MY HEALTH" VALUE STATEMENT: When a digital health solution provides accurate information, I trust it to work in my best interest and that I will be in charge of my health care. This makes me feel in control, confident and responsible, which matters because I want to be responsible for my health.



NOTE: Percentages in the value chain are the total % of women who chose this feature, benefit or value. The “% who identify with this value proposition” includes all women for whom this is the best fit and who connected at least two levels in the value proposition.

Previous users and non-users more commonly identify with the "peace of mind" value proposition compared to current users

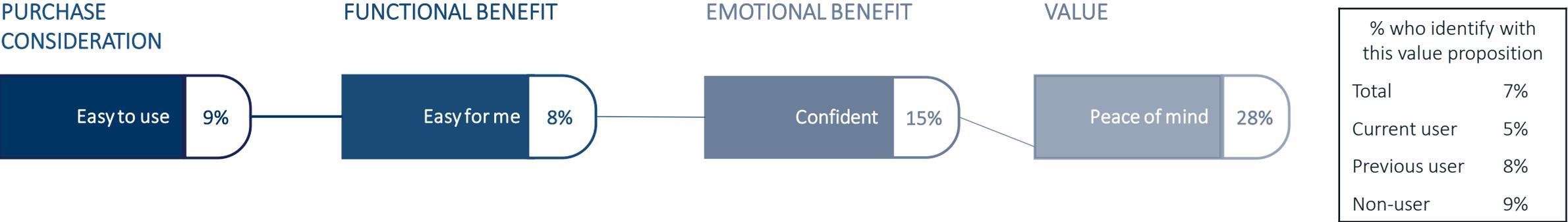
"PEACE OF MIND" VALUE STATEMENT: When a digital health solution is FDA-approved and has a high standard of data security, I trust that it is working in my best interests. This makes me feel secure, which is important because I will have peace of mind.



NOTE: Percentages in the value chain are the total % of women who chose this feature, benefit or value. The “% who identify with this value proposition” includes all women for whom this is the best fit and who connected at least two levels in the value proposition.

"Ease of use" is a less common value proposition, but about 1 in 10 previous users and non-users identify with it

"EASE OF USE" STATEMENT: A digital health solution that is easy to use makes it easy for me, which helps me feel confident. This matters because I want peace of mind.



NOTE: Percentages in the value chain are the total % of women who chose this feature, benefit or value. The “% who identify with this value proposition” includes all women for whom this is the best fit and who connected at least two levels in the value proposition.

Nearly all women own at least one technology product, with smartphones, laptop computers and smart TVs being most common

- Aside from a smartphone, current users of digital health solutions are more likely to own each product.

Technology Products Owned

% selecting | n=1001

		Current user (n=456)	Previous user (n=151)	Non-user (n=394)
Smartphone	93%	93%	93%	93%
Laptop computer	68%	75%▲	71%	58%▼
Smart TV	67%	72%▲	75%▲	59%▼
Tablet	56%	62%▲	58%	48%▼
Hearables (i.e., earbuds/headphones)	44%	53%▲	46%	30%▼
Desktop computer	37%	41%▲	38%	32%▼
Smart speaker with built-in digital assistant	34%	43%▲	33%	24%▼
Smartwatch	33%	46%▲	28%	17%▼
Wearable device, not including a smartwatch	15%	24%▲	7%▼	7%▼
Virtual reality headset	8%	11%▲	8%	4%▼

99% own at least one technology product

More likely to own most technology products:

- Millennials
- Higher education (at least a four-year degree)
- Higher income (at least \$100,000)

Q. Which of the following technology products do you currently own?; ▲ ▼ indicates result is significantly higher/lower than the total.

Gen Z places more importance on FDA approval, Gen X on ease of use and Boomer/Mature women on accuracy, insurance coverage and doctor recommendations

- Adoption considerations also vary for Caucasian women versus women of color and by household income.

Adoption Consideration Importance by Demographic

Considerations with above-average importance displayed

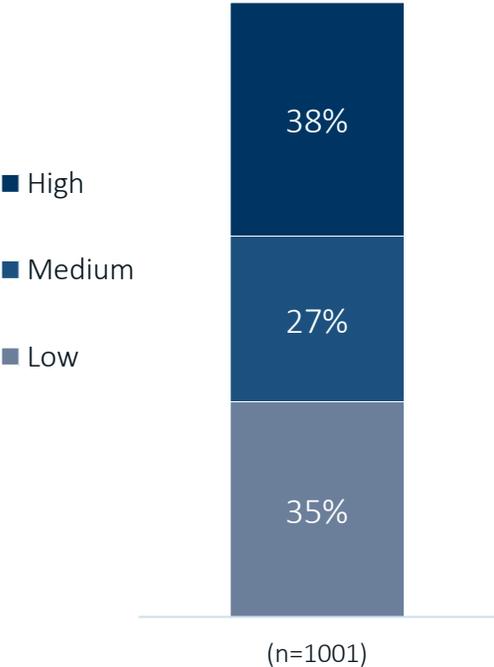
Consideration	Total (n=1001)	Generation				Woman of Color		Income		
		Gen Z (n=77)	Millennial (n=236)	Gen X (n=265)	Boomer/ Mature (n=423)	Yes (n=340)	No (n=661)	<\$50K (n=395)	\$50K to <\$100K (n=260)	\$100K+ (n=346)
Low cost	229	200	225	242	236	242	222	266▲	222	190▼
Accurate data/information	200	120▼	178	223	231▲	157▼	227▲	157▼	202	251▲
Covered/reimbursed by health insurance	192	175	159▼	181	233▲	194	190	208	199	166
Easy to use	180	111▼	160	232▲	185	176	183	186	167	183
High standard of data security/privacy	159	111▼	156	178	166	155	161	138▼	195▲	158
FDA-approved	145	220▲	143	129	131	186▲	119▼	151	145	139
Doctor recommends it	144	160	99▼	115▼	197▲	130	153	158	125	143
Personalized/tailored info	119	145	140	109	98▼	100▼	130▲	96▼	130	137
Convenient/easily accessible	107	118	116	106	98	99	113	94▼	116	118

Based on MaxVal™ scores computed through consideration rankings.; ▲ ▼ indicates result is significantly higher/lower than the total.

Highly techno-ready women place less importance on cost, insurance coverage and data security/privacy, although these considerations still matter

- Cost is, by far, the top consideration for low techno-ready women.

Techno-Readiness (TR)
Propensity to adopt and embrace technology



Adoption Consideration Importance by Techno-Readiness
Considerations with significant differences displayed

Consideration	Total (n=1001)	High TR (n=357)	Medium TR (n=272)	Low TR (n=372)
Low cost	229	200 ▼	212	275 ▲
Covered/reimbursed by health insurance	192	153 ▼	218	213
High standard of data security/privacy	159	133 ▼	172	177
FDA-approved	145	159	165	114 ▼
Personalized/tailored info	119	140 ▲	114	99 ▼
Adequate clinical efficacy evidence	74	87 ▲	56 ▼	73
Easy to buy	72	86 ▲	73	56 ▼
Integration with other technology I use	50	65 ▲	46	38 ▼
Reviews from other users	44	57 ▲	37	35 ▼
Familiar/heard of company offering	43	43	55	34 ▼
Friend or family recommends using it	40	46	46	27 ▼

Based on MaxVal™ scores computed through consideration rankings; ▲ ▼ indicates result is significantly higher/lower than the total.

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