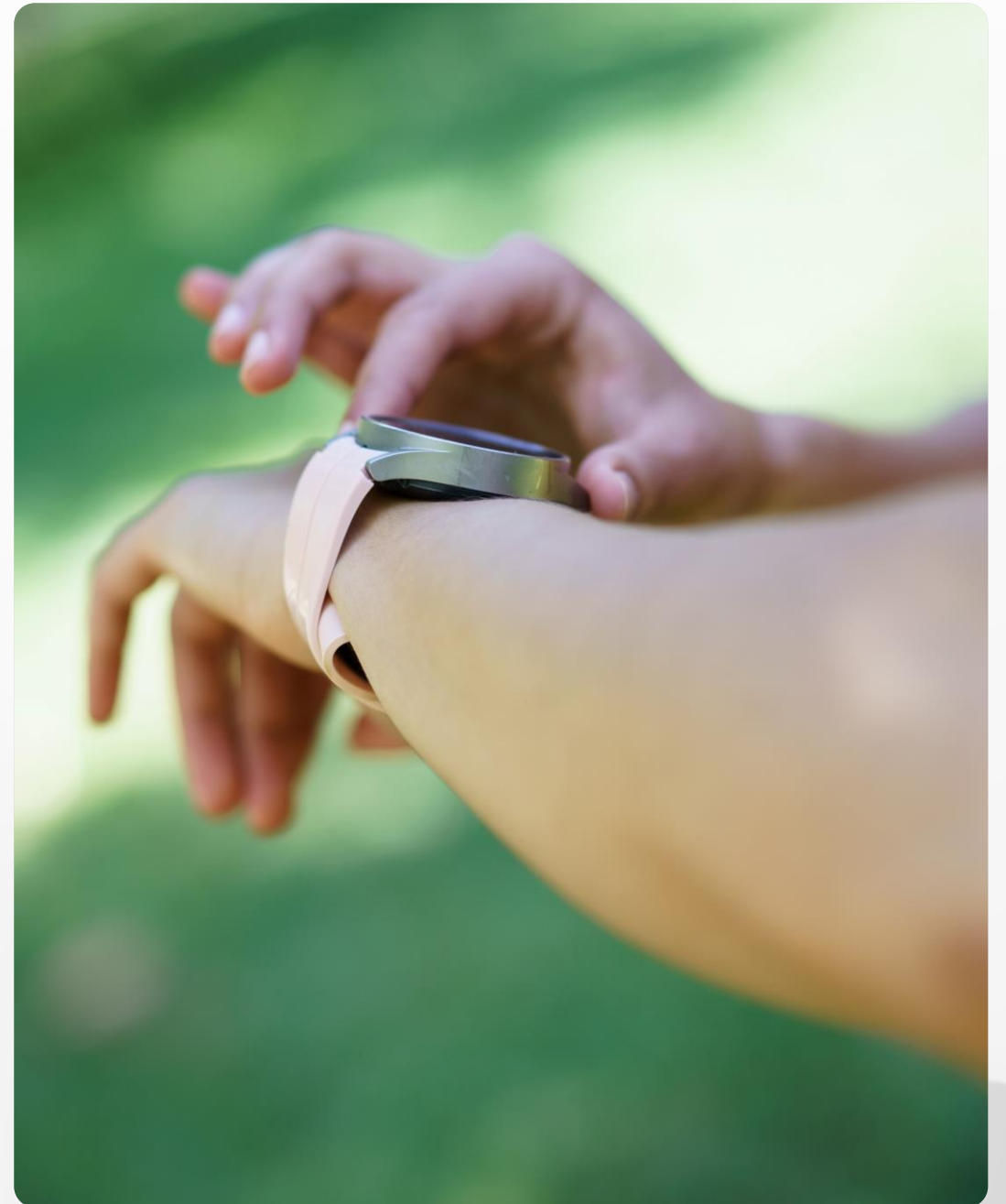




Wearable Technology in Canada & the U.S.

Understanding Adoption, Usage Patterns, and Data-Sharing Preferences of Wearable Technology Users

October 2024



1

Objectives & Methodology

Methodology



Where

Canada
United States



Target

General population
(18 years +)



Sample Size

n=1,626 (Canada)
n=1,010 (U.S.)



How

Online survey
conducted via LEO



Field Dates

September 27-30, 2024

→ Note:
Data weighted to census data to ensure all samples are representative of the respective general populations.

The **Key Objectives** for this Study



Evaluate how the ownership and use of wearable technology **impacts users' health-related behaviours**, including physical activity, sleep quality, and diet.

Investigate the **primary reasons** users adopt wearable technology and the **concerns or barriers** that affect their willingness to use these devices regularly.

Explore users' attitudes towards **sharing health data** with various entities (healthcare providers, financial institutions) and the **perceived value** of incentives for sharing this data.

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Key Findings

Key Findings

1

Around two in five Canadians and Americans use wearable technology, with Americans using more regularly than Canadians.

2

Smartwatches are the most popular wearable device in both countries.

**3**

Tracking physical activity is the leading reason for using wearable technology in both Canada and the U.S.

4

Americans report more health-related improvements from wearable technology compared to Canadians.

5

The biggest concern with wearable devices is the cost of devices, with over half of Canadians and Americans concerned about it.

**6**

Advanced health monitoring, improved battery life, and mental health tracking are the top features that drive interest in wearable devices.

7

Canadians and Americans trust healthcare providers the most with their wearable health data, but Americans are more open to sharing than Canadians.

8

Americans are more likely than Canadians to expect technology to be more integrated into daily life over the next five years.

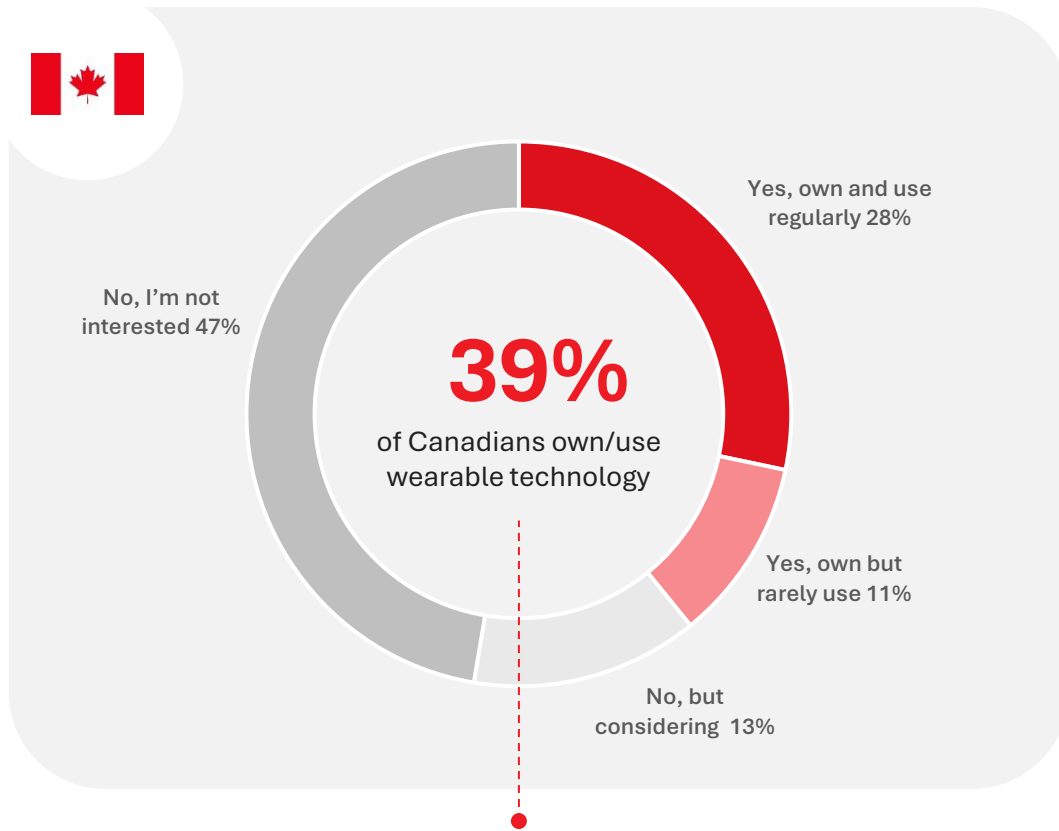


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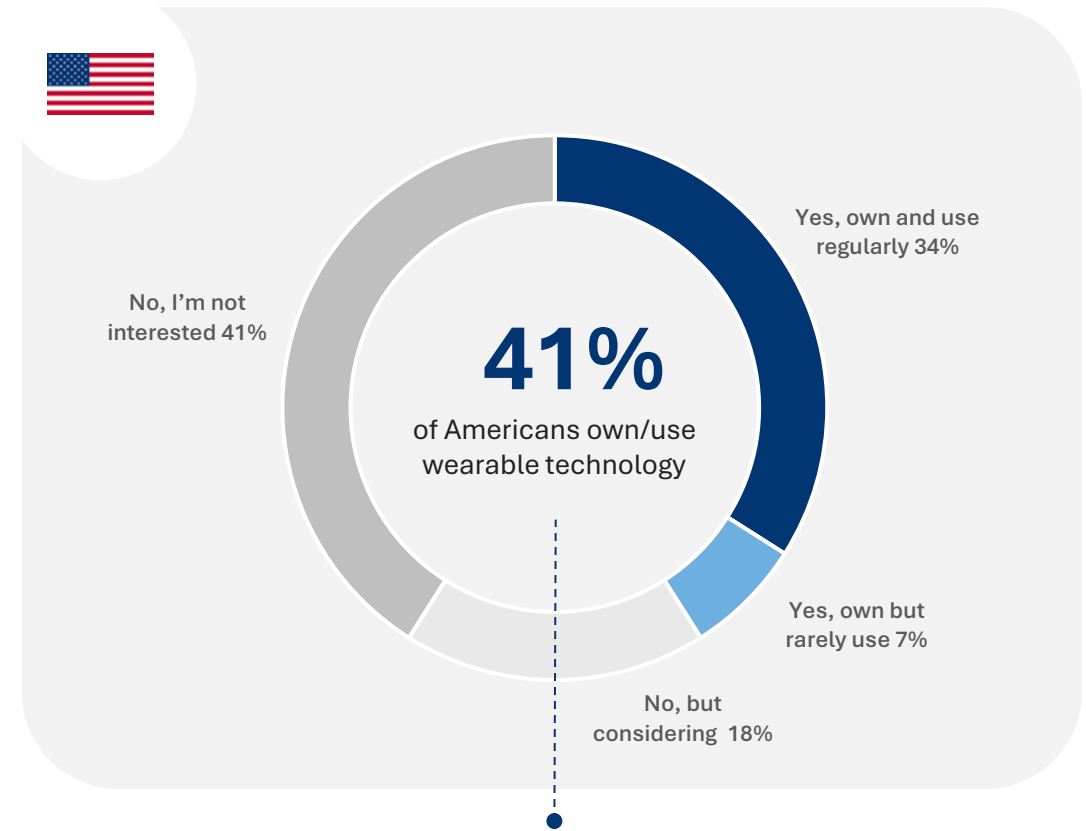
Detailed Results

About 2 in 5 Canadians and Americans own or use wearable technology.

Americans are more likely to use wearable technology on a **regular basis** (34%) versus Canadians (28%). Unsurprisingly, interest in wearable technology is lower among older age groups.



Younger Canadians (18-34: 51%) are more likely to have wearable technology than older Canadians (55+: 28%).



Similarly, younger Americans (18-34: 56%) are more likely to have wearable technology than older Americans (55+: 25%).

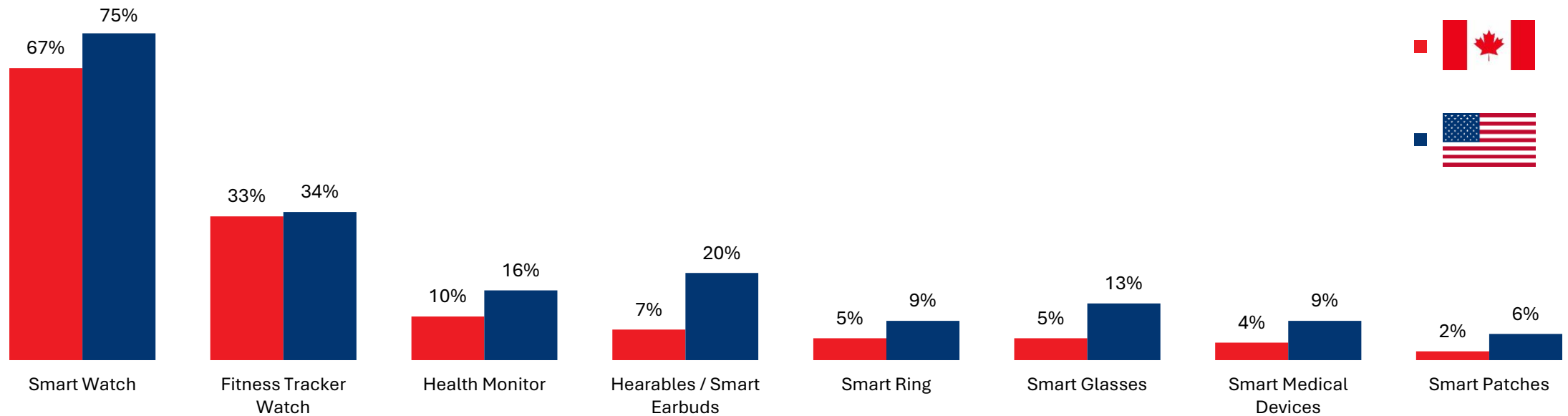
Base: Canadian (n=1,626) and American (n=1,010) general population
 Q. Do you currently own or use any wearable technology devices (e.g., smartwatch, fitness tracker, smart glasses)?

Smart watches are the **most popular** type of wearable technology among users.

Americans are more likely to use a broader range of wearable tech than Canadians.

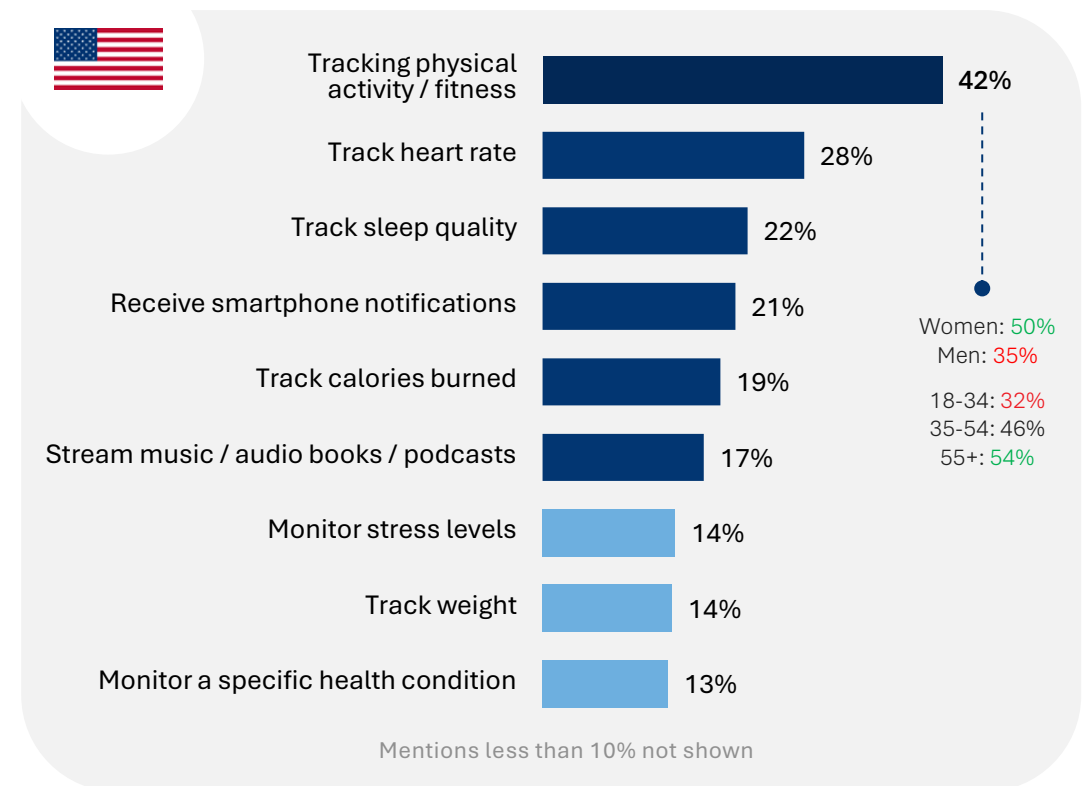
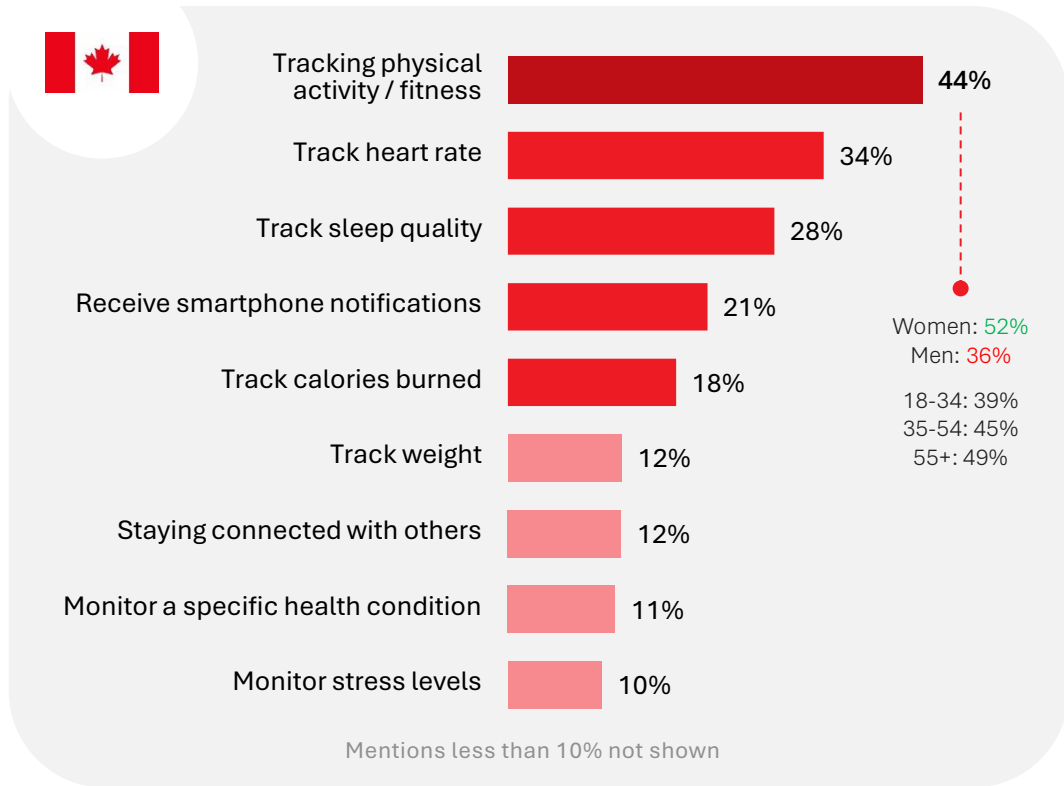
TYPES OF WEARABLE TECHNOLOGY USED

Among owners of wearable technology



Tracking physical activity is the top reason for wearable technology use among Canadians and Americans.

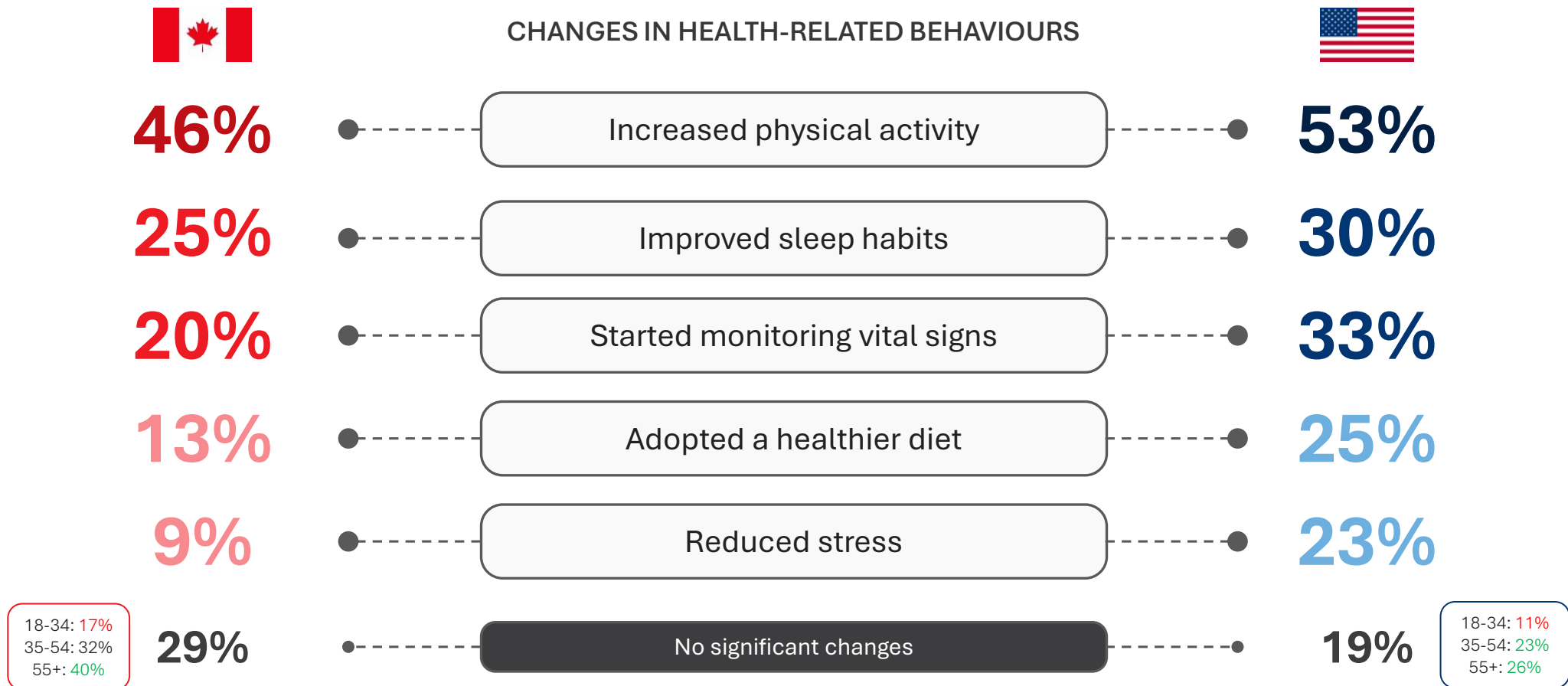
TOP REASONS FOR WEARABLE TECHNOLOGY USAGE



Women tend to use wearable technology for the purpose of tracking their physical fitness more than men. A similar trend is seen among the older age group, especially among Americans.

Wearable technology leads to health-related behavioural changes in Canada and the U.S. **Increased physical activity** is the top change made from using a wearable device.

Americans are more likely to experience broader health benefits from their use of wearables than Canadians. Older respondents in both countries are more likely to say they haven't noticed any changes in their health-related behaviours than their younger counterpart.

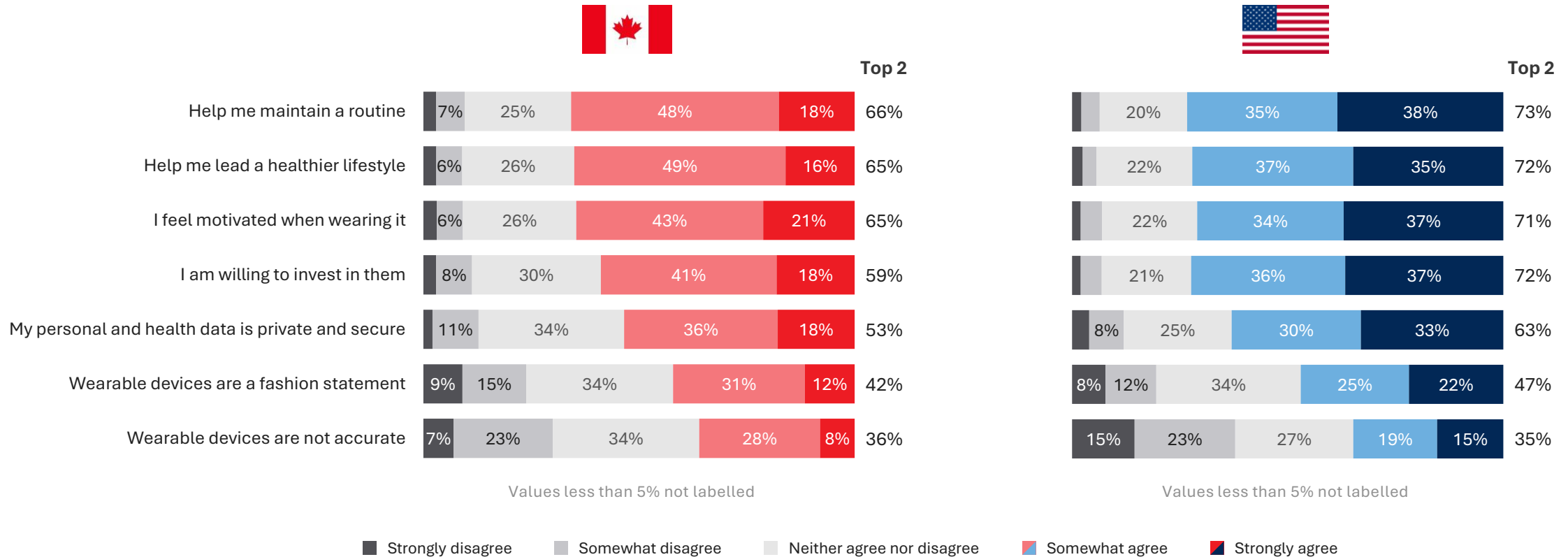


Base: Canadians (n=646) and Americans (n=382) who own or use wearable technology
 Q. Since using a wearable device, have you noticed or made any of the following changes in your health-related behaviors?

A majority of Canadians and Americans agree that using wearable devices helps them **maintain a routine** and a **healthier lifestyle**.

Americans tend to show stronger trust and enthusiasm towards wearable technology than Canadians.

ATTITUDES TOWARDS WEARABLE TECHNOLOGY



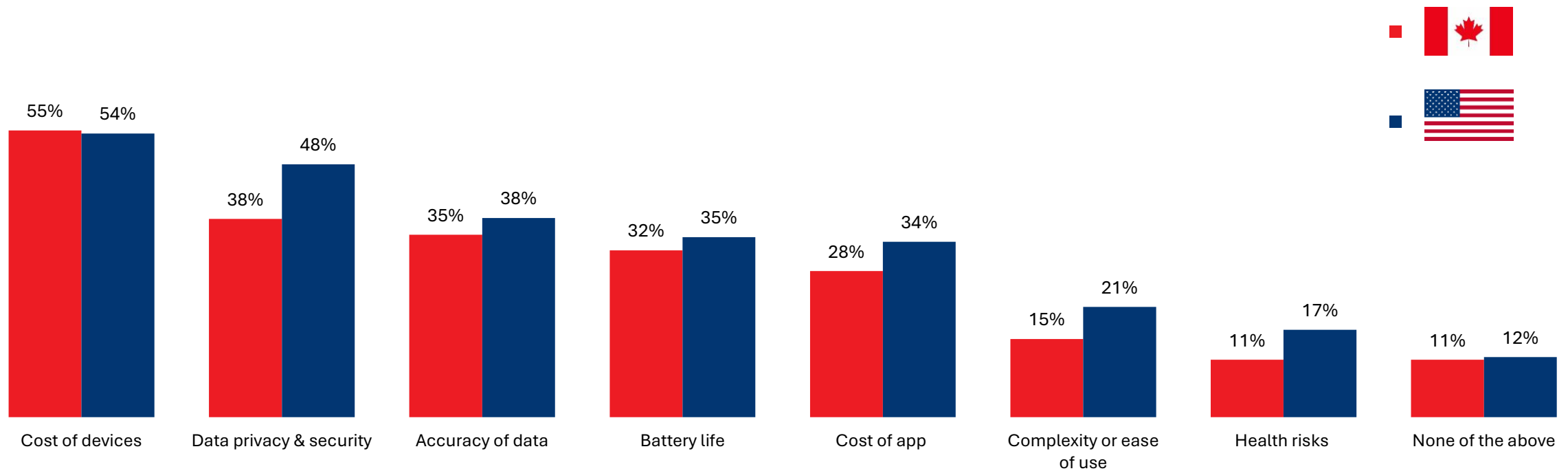
Base: Canadian (n=1,626) and American (n=1,010) general population

Q. Please indicate how strongly you agree or disagree with each of the following statements regarding your devices (i.e., smart watch/bracelet, headwear/eyewear, rings)?

Cost of devices is the leading concern among both Canadians and Americans.

Americans are more concerned with data privacy and security with wearable technology than Canadians.

TOP CONCERNS WITH WEARABLE TECHNOLOGY

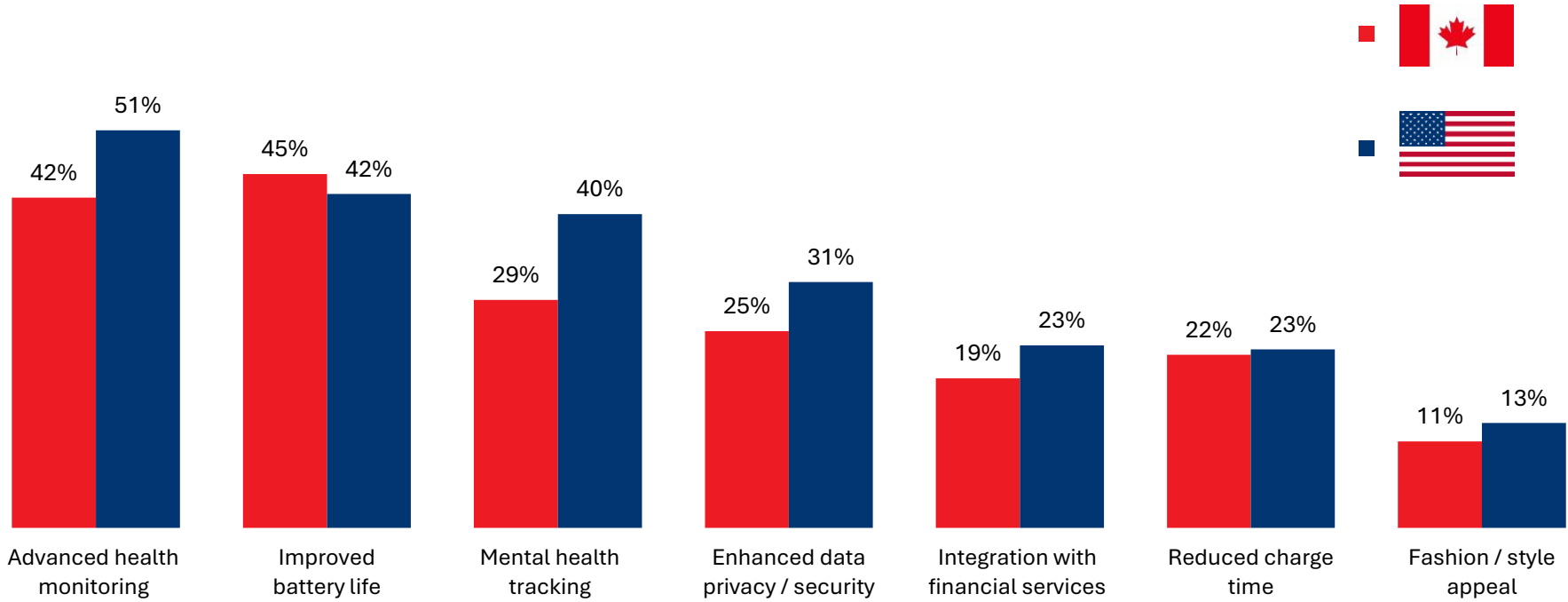


Base: Canadian (n=1,626) and American (n=1,010) general population
 Q. What concerns, if any, do you have about using wearable technology?

Advanced health monitoring and improved battery life are key features for consumers.

Americans show a higher interest in advanced health monitoring, mental health tracking, and enhanced data security compared to Canadians.

TOP FEATURES

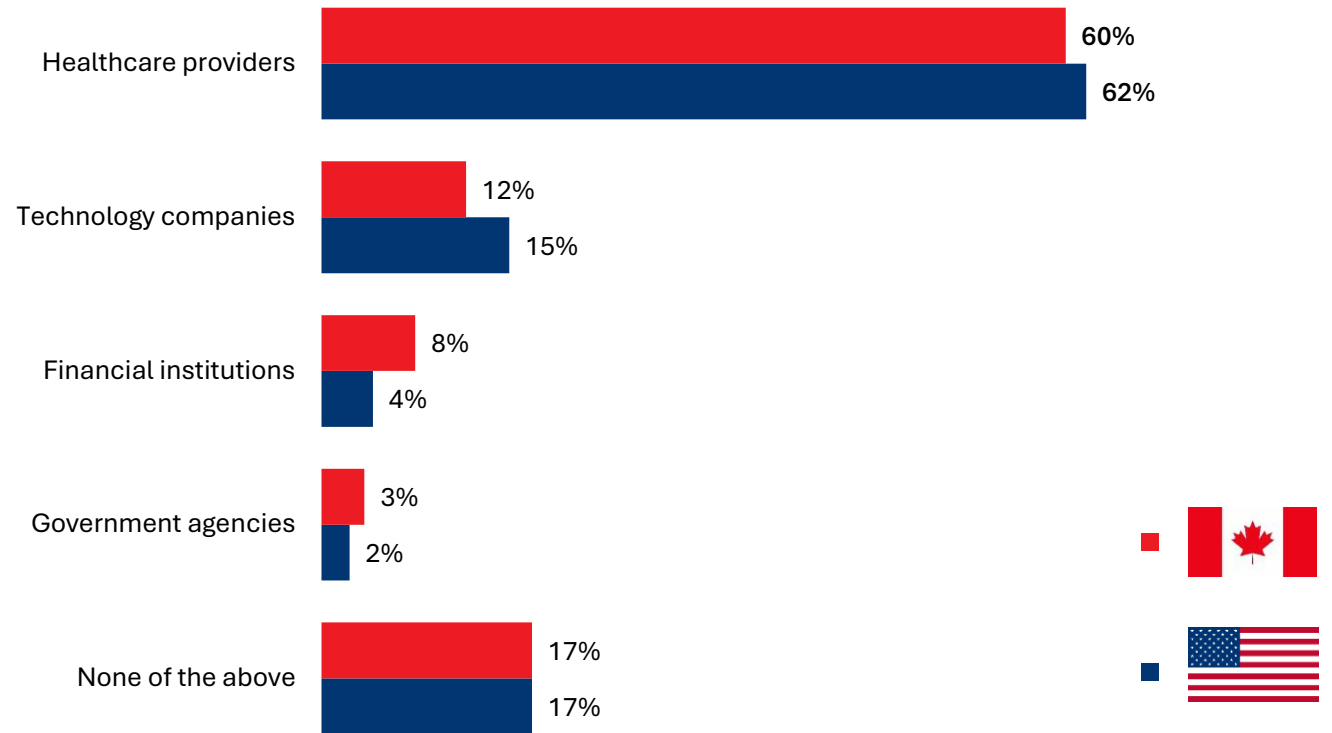


Base: Canadian (n=1,626) and American (n=1,010) general population
 Q. Which of the following features would make you more interested in purchasing or using a wearable device?

Healthcare providers are the most trusted entities for health data.



MOST TRUSTED ENTITIES FOR HEALTH DATA

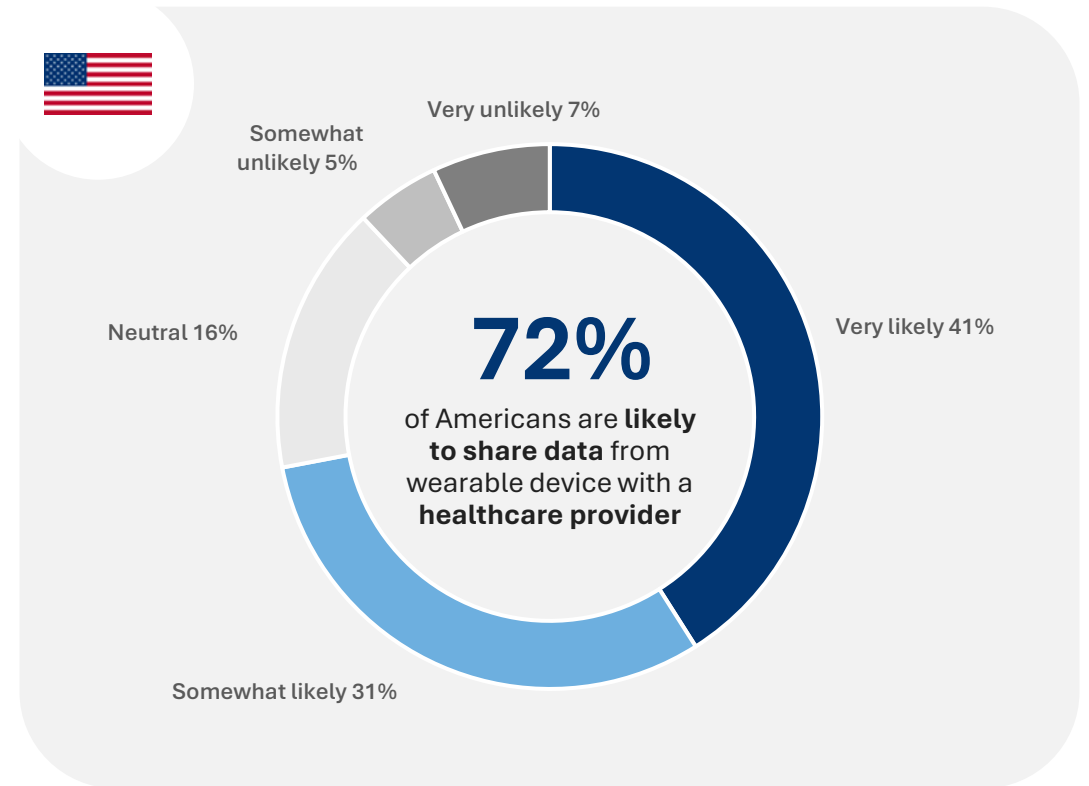
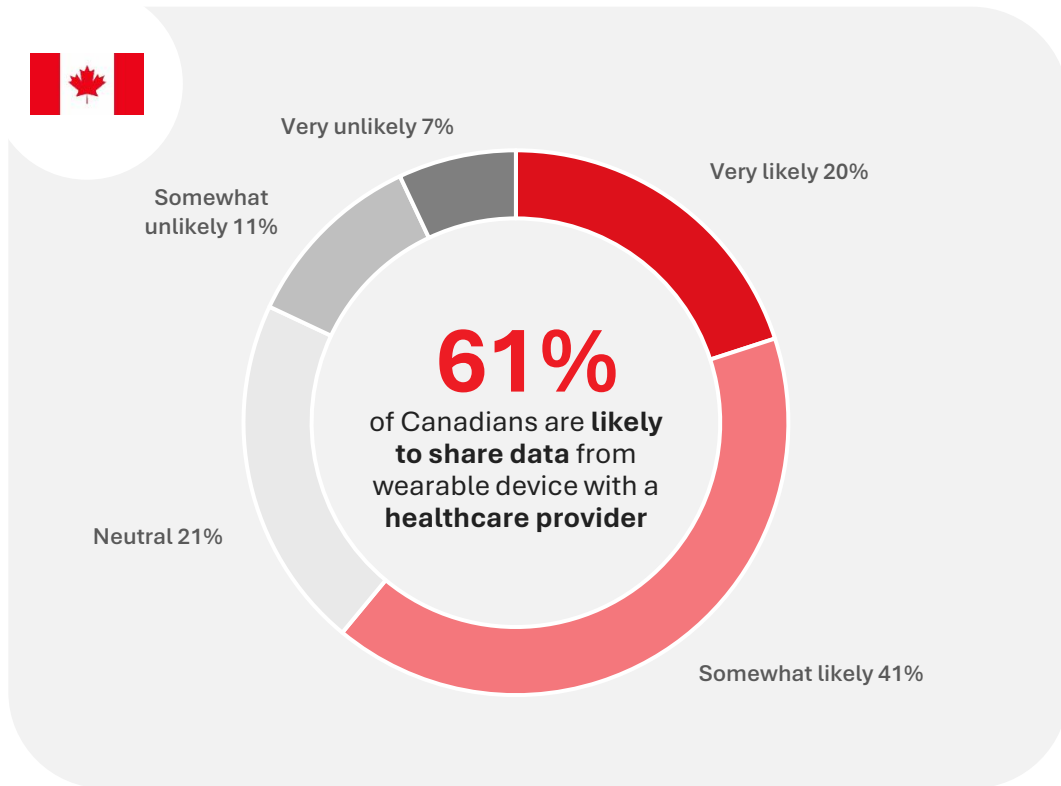


Base: Canadian (n=1,626) and American (n=1,010) general population
Q. Which of the following entities would you trust the most with your health data from wearable devices?

Americans are **more willing to share** wearable data with **healthcare providers** than Canadians.

A majority of Canadians and Americans say they would be likely to share their data from their wearable device with healthcare providers.

SHARING DATA WITH HEALTHCARE PROVIDERS

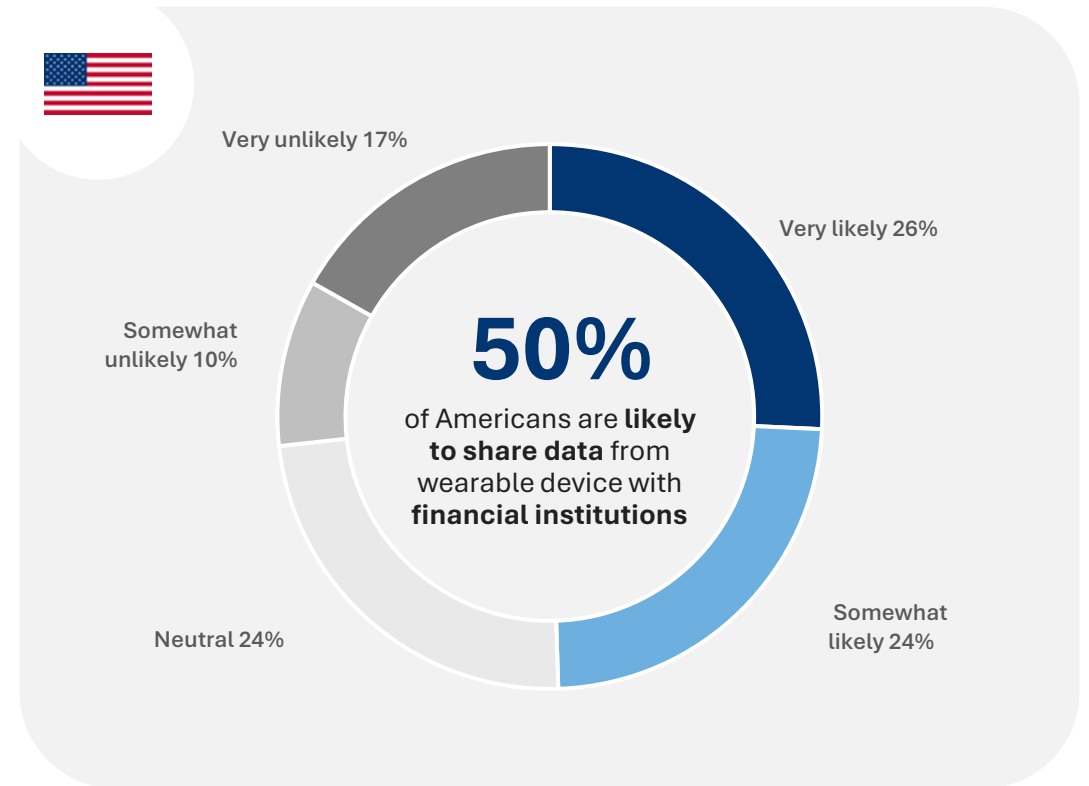
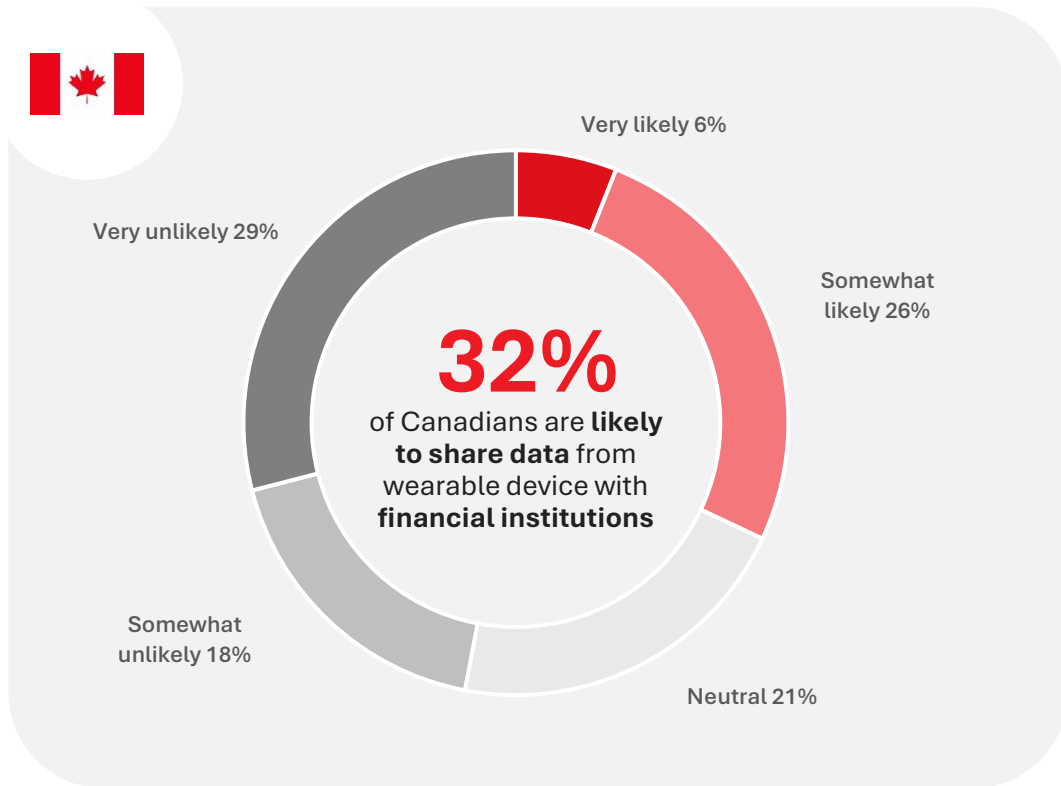


Base: Canadian (n=1,626) and American (n=1,010) general population

Q. How likely would you be to share data from your wearable device with a healthcare provider (e.g., your GP, pharmacist, nurse practitioner, or other health professional)?

Americans are more likely to be **open to sharing data** from wearable devices with **financial institutions** compared to Canadians.

SHARING DATA WITH FINANCIAL INSTITUTIONS



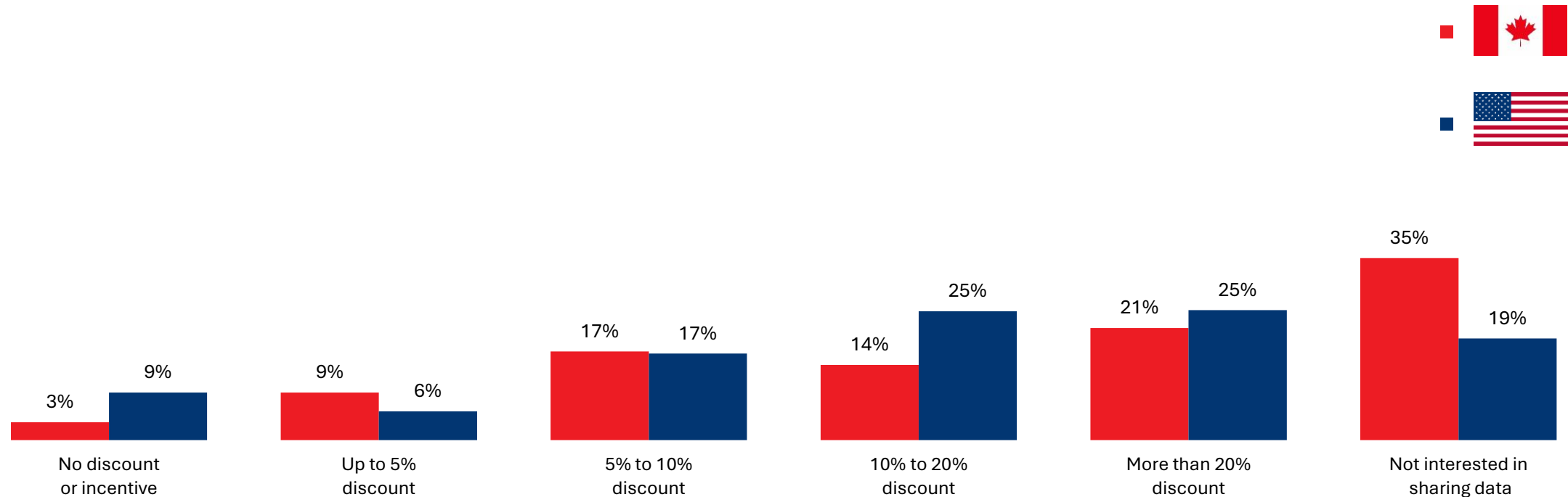
Base: Canadian (n=1,626) and American (n=1,010) general population

Q. How likely would you be to share data from your wearable device with a healthcare provider (e.g., your GP, pharmacist, nurse practitioner, or other health professional)?

A majority of Canadians and Americans would expect discounts to share their data with insurance providers.

Canadians are less interested in sharing data with insurance providers than Americans, even with incentives.

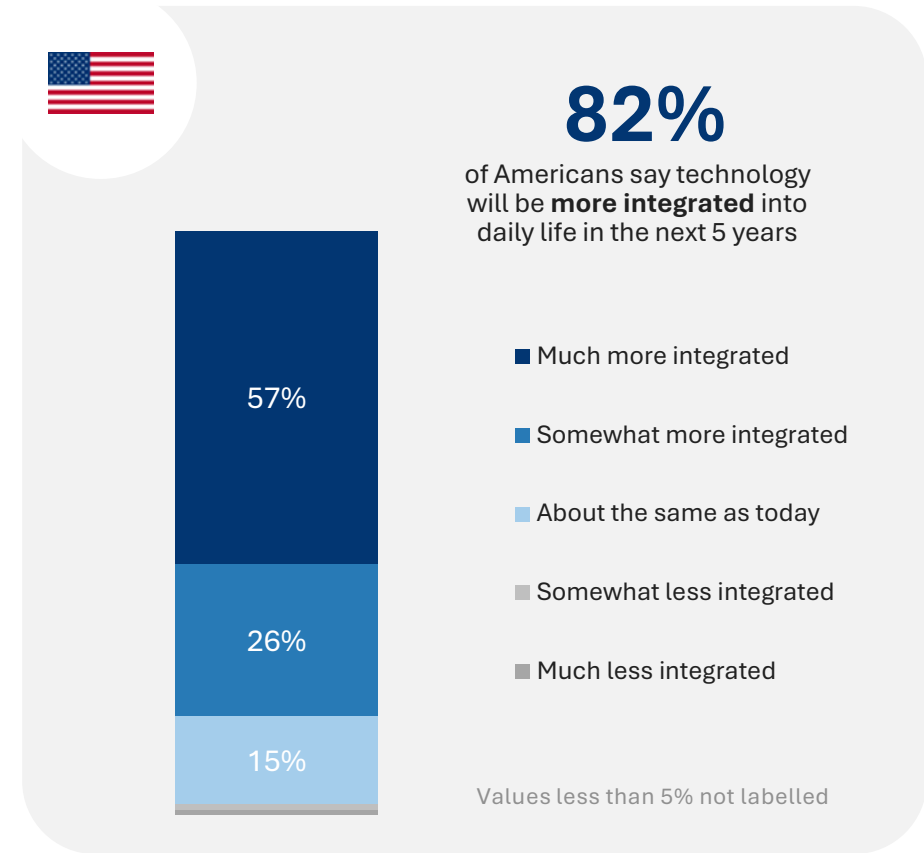
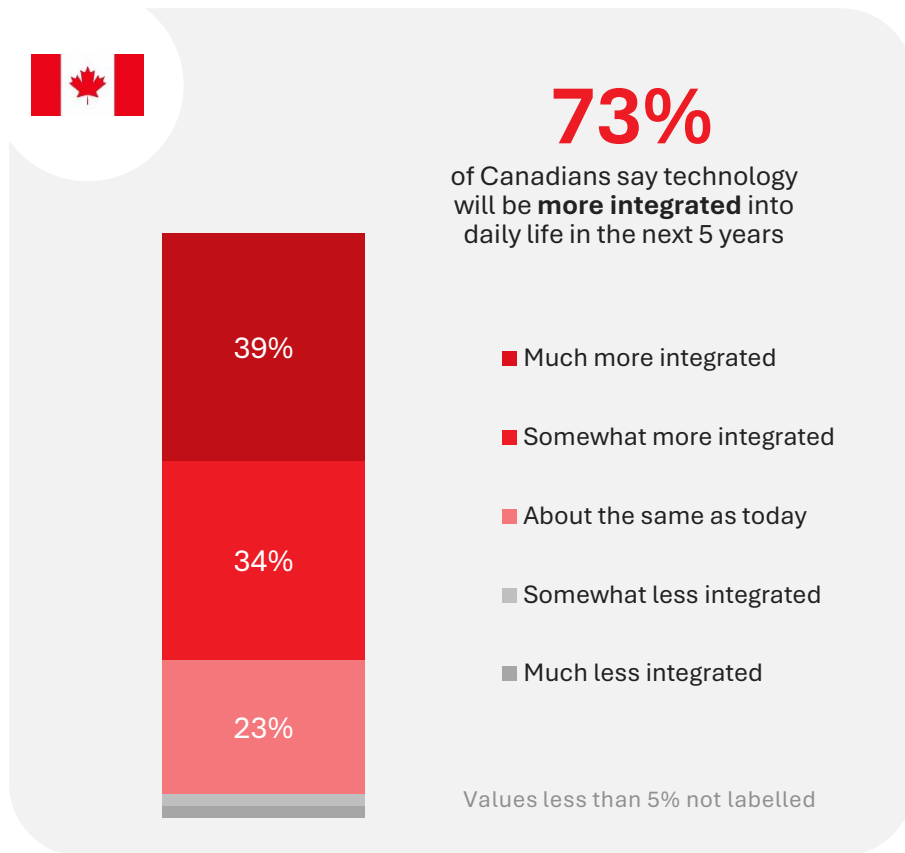
INCENTIVES FOR DATA SHARING WITH INSURANCE PROVIDER



Base: Canadian (n=1,626) and American (n=1,010) general population

Q. If you were to share your health data from wearable devices with your insurance provider, what level of discount or incentive would you expect to receive on your insurance premiums?

Americans show a stronger expectation for **increased technological integration** into everyday life compared to their Canadian counterparts.



Base: Canadian (n=1,626) and American (n=1,010) general population
Q. In the next five years, do you think wearable technology will become:

Both Canadians and American **highly value** wearable technology devices in their lives.

Americans value wearable technology slightly more than Canadians.

VALUE OF WEARABLE TECHNOLOGY



Base: Canadian (n=1,626) and American (n=1,010) general population
Q. On a scale of 1 to 10, how would you rate the overall value of wearable technology in your life?

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