



THE RISE OF HEALTH AI IN CARE DECISIONS:
INSIGHTS FROM ROCK HEALTH'S
CONSUMER ADOPTION SURVEY

Rock Health Advisory specializes in digital health strategy and innovation

Rock Health Advisory is a boutique strategy group that provides **data-driven insights** and **strategic guidance** to drive **digital health innovation** for enterprises, growth-stage startups, and private equity investors

INSIGHTS MEMBERSHIP

On-demand support for enterprise leaders to get the scoop on new markets, access data-driven insights, and make connections



STRATEGY CONSULTING

Expert team to support you in cracking tough problems, identifying winning opportunities, and designing your strategy



15

years of market leading proprietary data



400+

annual press citations of our research and publications



100+

client organizations served across healthcare ecosystem



75K+

industry leaders in our network enabling under-the-hood insight

The New York Times

WSJ

SCIENTIFIC AMERICAN

STAT

TIME

CVS Health

GSK

labcorp

Providence

TERUMO

DEEP DIVE

CONSUMER ADOPTION OF DIGITAL HEALTH

Adoption of virtual care and wearables have normalized at scale

DIVING INTO OUR 11TH YEAR OF CONSUMER ADOPTION DATA

Among all respondents...



VIRTUAL CARE USE

58%

— same as 2024

used virtual care in the past 12 months



WEARABLE OWNERSHIP

46%

▲ 2pp since 2024

own a wearable



HEALTH TRACKING

57%

▲ 3pp since 2024

track at least one health metric digitally



HEALTH DATA SHARING

91%

▲ 2pp since 2024

willing to share data with at least one entity

KEY FINDINGS FROM THIS YEAR'S SURVEY



AI FOR HEALTHCARE

32%

jumps to **60%** among pregnant women

of all respondents used an AI chatbot to search for health info



SMART WATCH OWNERSHIP

43%

93% of all wearable owners at least own a smartwatch

of all respondents own a smartwatch (e.g., Apple Watch, Fitbit)



SMART RING OWNERSHIP

8%

jumps to **15%** for those who rate their health as "excellent"

of all respondents own a smart ring (e.g., Oura, Ultrahuman)



PRESCRIPTION DELIVERY

48%

jumps to **65%** for those on 4+ prescriptions

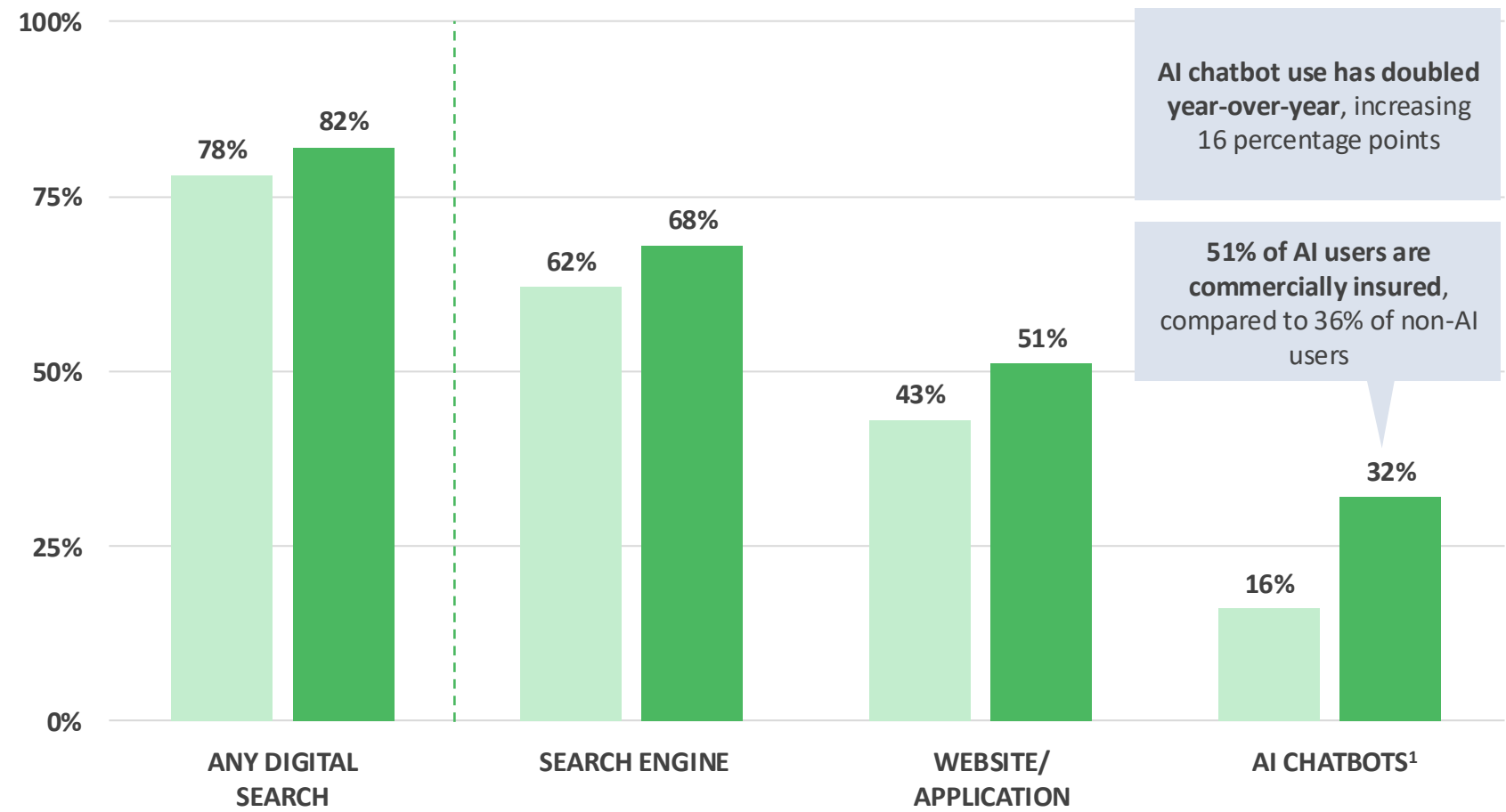
of all respondents have had a prescription delivered to their home

AI is rapidly becoming a primary touchpoint for health information seeking

ONLINE HEALTH INFORMATION SEEKING BY CHANNEL

2024-2025; multi-select

LEGEND: 2024 2025



81% of AI users reported taking action following their chatbot use



40%
CONSULTED A PROVIDER



22%
CHANGED OR MADE AN APPOINTMENT



18%
ADJUSTED MEDICATIONS

Survey questions: Have you searched for any of the following using a specific website or app, search engine, or AI chatbot?; What actions, if any, have you taken after asking an AI chatbot (e.g., ChatGPT, Google Gemini) a health-related question?

Sources: Rock Health 2024 Consumer Adoption of Digital Health Survey (N=8,032); Rock Health 2025 Consumer Adoption of Digital Health Survey (N=8,000; n_{AI users}=2,548); ¹Terminology updated from “AI tool or chatbot” (2024) to “AI chatbots” (2025); Rock Health research and analysis

Consumers who use AI chatbots for health information show higher adoption across other digital health behaviors

AI USERS

Respondents who have used an AI chatbot for health information

94%



TRACKED 1+ HEALTH METRIC

84%



USED APP/VIRTUAL CARE PROGRAM IN PAST YEAR

78%



USED VIRTUAL CARE IN PAST YEAR

67%



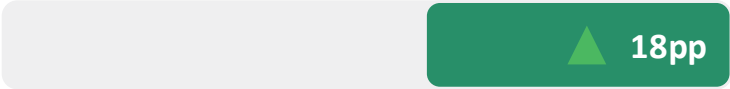
OWN WEARABLE DEVICE

51%



USED AT-HOME TEST KITS

30%



OWN CONNECTED MEDICAL DEVICE

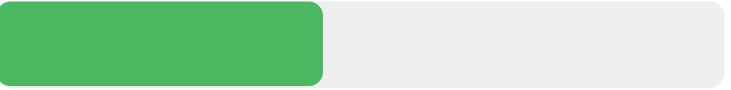
NON-AI USERS

Respondents who have not used an AI chatbot for health information

82%



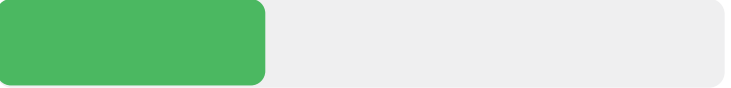
42%



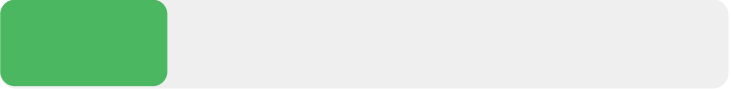
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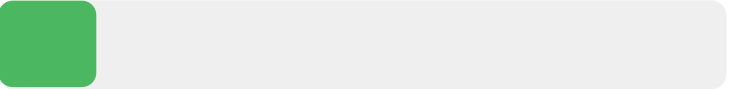
37%



19%



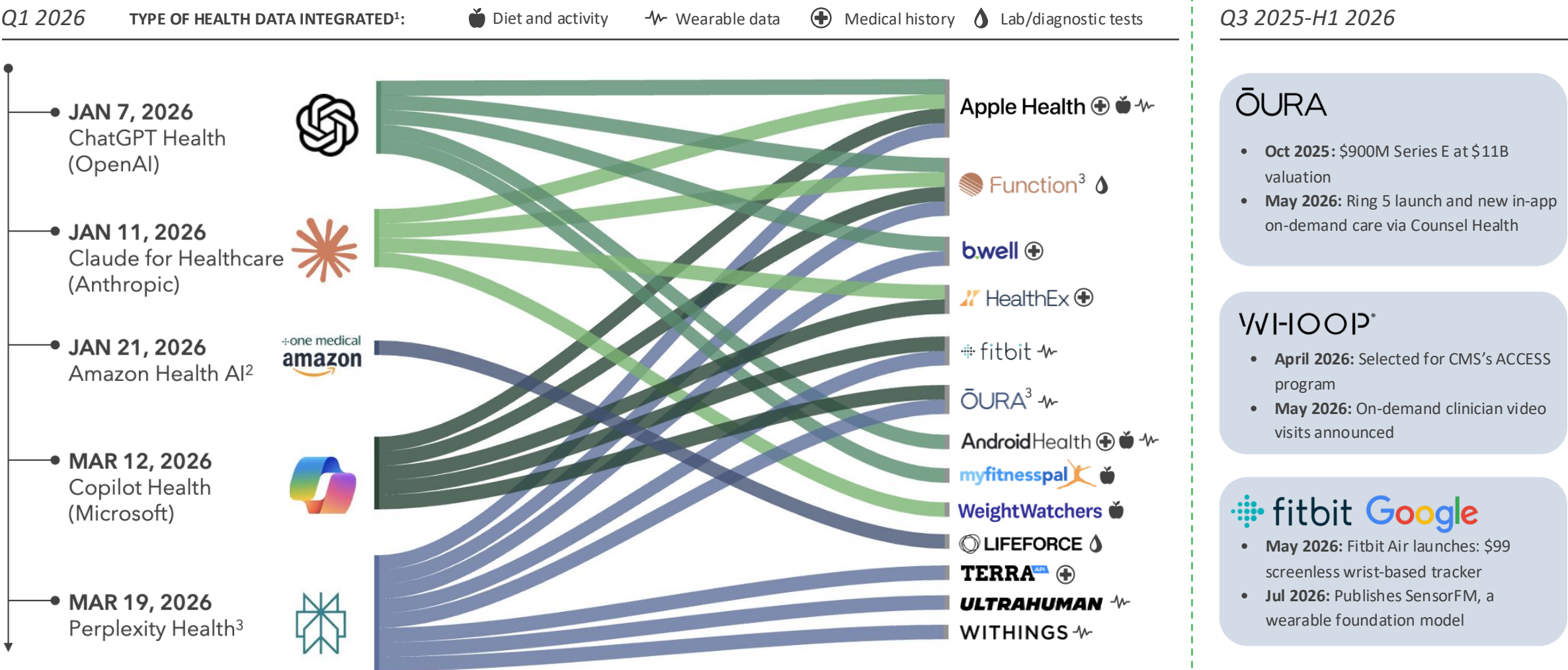
12%



KEY: ▲ Percentage points higher than non-AI users

Since Rock Health's 2025 survey, consumer AI health launches have moved quickly to connect into existing consumer ecosystems

CONSUMER AI HEALTH LAUNCHES AND DATA-INTEGRATION PARTNERSHIPS

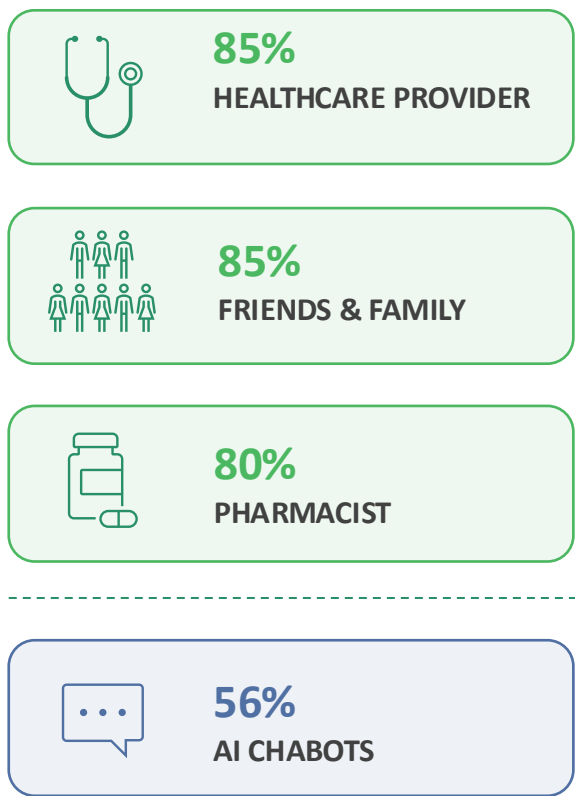


Notes and sources: Includes consumer-facing interfaces and features across D2C and enterprise-positioned offerings; ¹Icons are categorized according to primary data value proposition but may include additional data types; ²Amazon Health AI uses One Medical's own EHR infrastructure; no third-party data partnerships at launch; ³Oura and Function integrations for Perplexity Health announced as "expected"; Partnerships announced as of March 31, 2026; Rock Health research and analysis

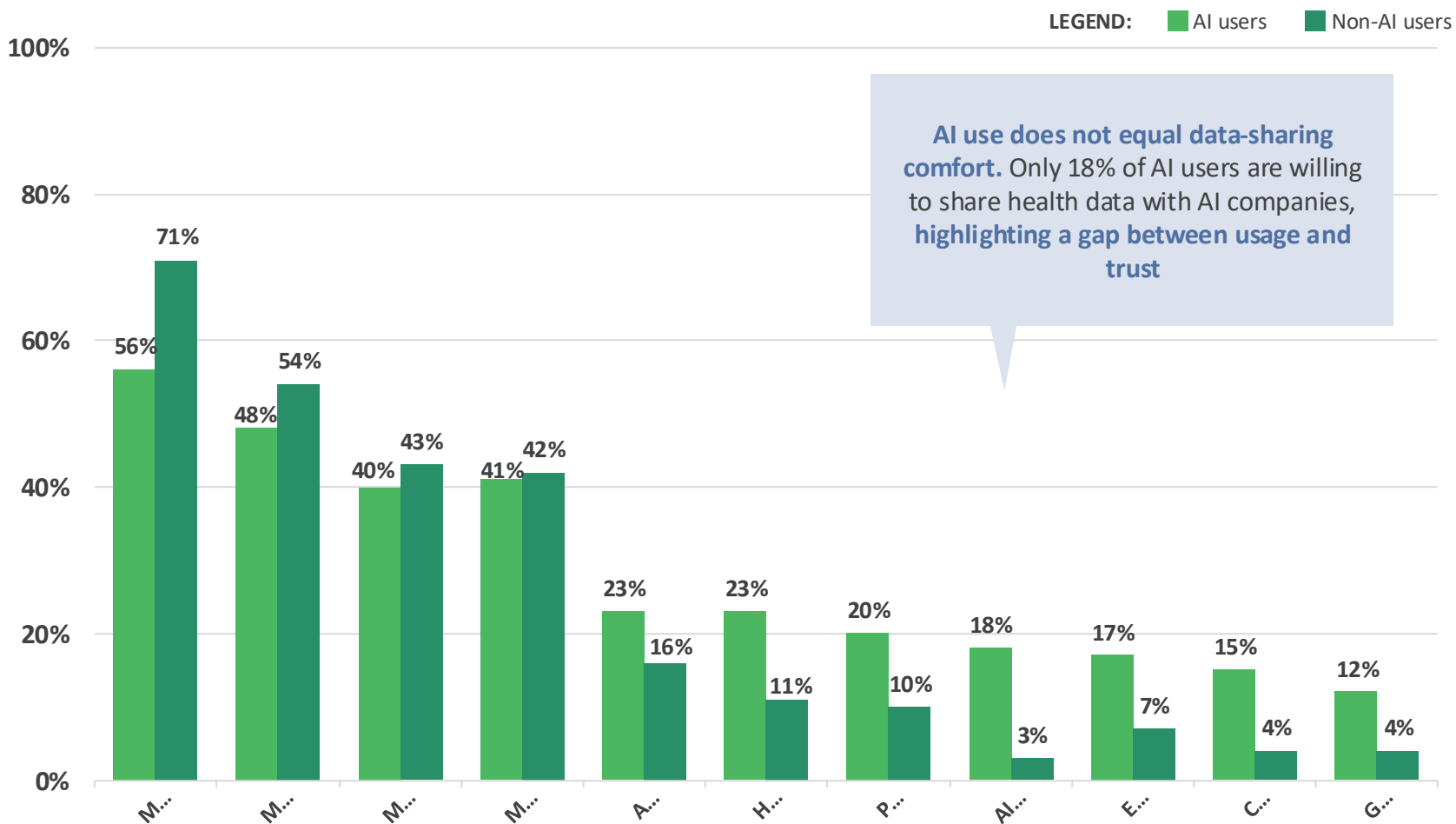
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AI users are more willing to share data with non-traditional entities like tech

TOP THREE TRUSTED SOURCES OF HEALTH INFORMATION AMONG AI CHATBOT USERS



RESPONDENTS WILLING TO SHARE HEALTH DATA WITH SELECT STAKEHOLDERS 2025, by prior use of an AI chatbot for health information; multi-select



Survey questions: Please indicate whether you trust health information provided by each source; Please indicate which of the following individuals or organizations you would be willing to share your health information with (e.g., your medical records, test results, prescription medication history, genetic information, and physical activity data)
Source: Rock Health's 2025 Consumer Adoption of Digital Health Survey (N=8,000; n_{AI users}=2,548; n_{non-AI users}=5,452); Rock Health research and analysis

GO DEEPER

APPLY CONSUMER ADOPTION
INSIGHTS TO YOUR STRATEGY

Uncover additional insights to inform your unique strategy

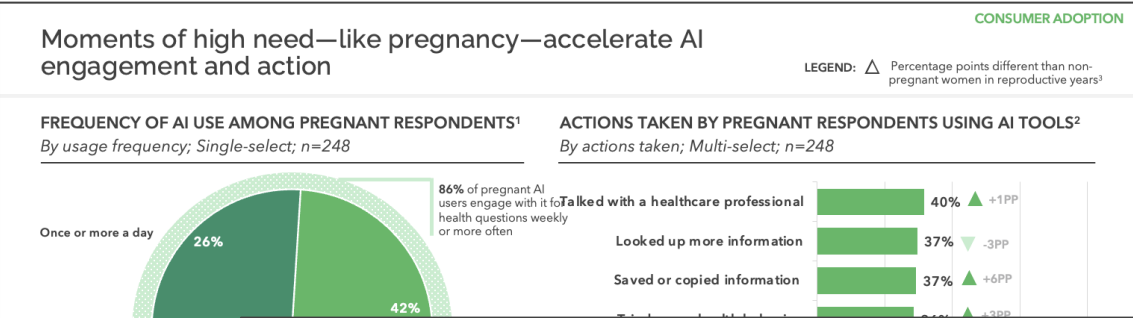


Unlock **specialized consumer adoption insights** and apply them as key inputs to drive your consumer-facing strategies and business planning

Example questions to explore with Consumer Adoption data:

- How does AI chatbot use vary among patients managing chronic conditions—and what does that mean for your care management strategy?
- How do virtual care preferences differ by race, income, and geography among your target population?
- What does the AI-enabled consumer look like in your therapeutic area?

EXAMPLE INSIGHTS



Preferences of women 18-24 for accessing future virtual care

WOMEN RESPONDENTS (18-24) PREFERENCE FOR ACCESSING VIRTUAL CARE IN THE FUTURE; BY SITE OF CARE
2023; top preference by care need^{1,2}

Care Need	Care Modality / Site of Care						
	Live video visit	Live phone call with healthcare provider	Messaging (e.g., texting, messaging via patient portal)	Healthcare provider's office	Retail clinic (e.g., CVS Minute Clinic)	Emergency room/urgent care clinic	In-person care at your own home
Prescription Refill	10%	22%	23%	14%	14%	7%	8%
Minor Illness	14%	12%	14%	25%	10%	13%	12%
Chronic Condition	11%	10%	7%	34%	5%	22%	11%
Emergency	9%	8%	6%	12%	2%	51%	10%
Annual Wellness	9%	9%	7%	47%	7%	9%	12%

Survey Question: "Consider how you would like to access care in the future. For each care need listed below, please select the option that best reflects how you would like to receive care for that need. Only select one answer per row."
Care needs responses: Medical emergency; Minor illness (e.g., flu/cold-like symptoms); Chronic condition; Mental health; Requesting a prescription refill; Primary care (e.g., annual wellness checkup); Physical therapy
Care Setting Responses: Live video visit; Messaging (e.g., text message (SMS), messaging via patient portal); Live phone call with healthcare provider; Emergency room/urgent care clinic; Healthcare provider's office; Retail clinic (e.g., CVS Minute Clinic); In-person care at your own home
Note: "Respondents were asked to select one response per care need; *Mental health and Physical Therapy were excluded care needs for this analysis
Source: Rock Health Consumer Adoption Survey 2023 (n=641; respondents ages 18-24)*

Other ways to engage with Rock Health



EVENTS & RESEARCH

H1 Digital Health Venture Funding Recap

Our [quarterly take](#) on shifts in the innovation landscape—investments, exits, partnerships—and impacts on the broader healthcare market.

Boom, bust, or bubble? With Radio Advisory

Rock Health Advisory CEO Megan Zweig joins an [episode](#) of Radio Advisory to explore funding trends and how health systems can engage in the startup ecosystem.

September 14-16: Rock Health in Nashville

Rock Health will be in Nashville in September for Nashville Healthcare Sessions, and Rock Health Advisory CEO Megan Zweig will be speaking at the 3rd Nashville Global Innovators Summit on the 16th!

October 14: Rock Health Summit

Rock Health's flagship event, this digital health conference brings together diverse minds from technology, medicine, public health, and beyond for a day of inspired conversation and connection.



ACCESS MARKET INTELLIGENCE

Insights Membership

Our data and insights help you connect the dots between latest trends and opportunities for your business—available through our Insights Membership



WORK WITH CONSULTING

Connect with Rock Health's consulting practice to support your key strategic initiatives in healthcare innovation

Questions?

Looking for strategic support through Membership or Consulting?
Reach out to us!



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