

Health-Study 2023

Search Engines, Tracking and Coaching Apps:
The responsible patient and digitalisation

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Methodology



Content: The study "Health-Study 2023" shows the results on attitudes and behaviors regarding health-specific aspects in the British population.



Target Group: British population aged 18 and over



Sample: N = 1,000



Methodology: Online questionnaire



Fieldwork: May 2023

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Management Summary

Healthier lifestyles despite barriers in the health system

Health issues are an important topic among the British population. Three quarters of respondents would like to live healthier (p. 65), with younger people in particular expressing a desire for a healthier lifestyle (p. 66). However, many people find it difficult to give up old habits in favour of a healthier lifestyle (p. 67). Older people in particular have difficulties with this (p. 68). Although the majority of people in the UK pay attention to their diet, they are often concerned about their own health (p. 71). About a quarter of Britons go to the doctor at least once a month (p. 69). However, preventive check-ups are regularly attended by less than half of respondents. In addition, more than 40 per cent of the British population had problems or difficulties accessing health services during the past six months (p. 10).

Digital health apps on the rise

Digital health applications such as apps and the Internet are becoming increasingly important in the UK. In the past six months, more than half of citizens have used digital health apps to self-diagnose and treat themselves instead of seeing a doctor (p. 13). This is especially true of younger age groups, who are more inclined to forgo a doctor's consultation and use digital apps (p. 14). The most commonly used medical app in the UK is the NHS app, an electronic patient record (p. 15). However, younger age groups are more likely to use these apps than older people (p. 16). It is also true that the use of digital health apps correlates with higher income (p. 17). However, less than half of the users see a real benefit in the NHS app (p. 18).

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Management Summary

Trust in digital health apps

Willingness to use digital health apps is highest when it comes to general wellbeing or treatment reminders (p. 19). A digital health app prescribed by a doctor is welcomed by around half of people to manage their health (p. 27). While the use of the NHS Covid 19 app has positively changed attitudes towards the use of digital health apps among about a third of the UK population (p. 25), many respondents are skeptical about the measurement accuracy of digital health apps (p. 23). Three out of ten Brits believe that a doctor-prescribed app can help them lose weight (p. 30) or that a doctor-prescribed wellness app could help them better manage their mental health (p. 32).

Health monitoring technologies and health data sharing

In the UK, many people are open to using technology for monitoring and improving their health. More than half of respondents are willing to connect their phone to devices such as a smartwatch or a virtual voice assistant like Alexa to monitor their health (p. 37). This willingness is particularly pronounced among younger people under 30 (p. 38). With rising income, the willingness to use such technologies also increases (p. 39). However, the disclosure of personal health data is also an important issue. Almost 80 per cent of respondents would be willing to make their health data available under certain conditions (p. 55). The most important prerequisite for this is to be able to determine who has access to the data. Willingness to share health data increases with income, and Britons with a high income would be most likely to make their health data available if it improved general health care (p. 57).

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Management Summary

Health apps: functions, willingness to pay, providers

There are many functions that a health app should perform. One important function would be the self-recognition of diseases and disease symptoms (p. 41). Self-monitoring of illness-related symptoms would be particularly important for 40- to under-50-year-olds (p. 42), while submitting sick notes and bills to the health insurance company via a health app would be a consideration mainly for people under 40 (p. 43). The willingness to pay for a health app is limited overall. Only one in five would be willing to pay more than £10 for a health app with the desired features (p. 44). Most Britons prefer the NHS as the provider of a health app (p. 46). However, many 30-39 year old would also get a health app from medical technology providers (p. 48). In order to spend £49 a month on a health app, it would have to offer a number of selected functions. First and foremost, the app is expected to automatically forward data on disease-related symptoms, such as blood pressure, weight, fatigue, etc. to the attending doctor. In addition, individually tailored recommendations based on one's own activities or mental health are of particular interest. If these criteria were met around 40 per cent of the respondents would be willing to pay this amount monthly (p. 49).

Apps on prescription

60 per cent of Britons are interested in apps on prescription, i.e. health apps that can be prescribed by doctors and financed by the National Health Service (NHS) (p. 60). For almost 90 per cent of the respondents who find an "app on prescription" interesting, there are a variety of possible applications. In the first place, it would be used for treating anxiety, depression or sleep disorders (p. 63).

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Management Summary

Health Freak, Health Know-it-all, Health Precautioner and Health Pragmatist: a typology of attitudes towards health issues.

According to a cluster analysis, four homogeneous groups of people have been identified who differ in their general attitudes towards health issues.

Health Freak

The Health freak is relatively young with an average age of 35 years. Although the members of this group pay particular attention to their diet, they often worry about their health and wish to live a healthier life. In addition, they go to the doctor more often than average (p. 79). They use medical apps such as the health record app, fitness tracker, or a mental health app primarily to ensure that they do not miss any treatment or to check symptoms and carry out self-diagnosis (p. 80).

Health Know-it-all

The Health Know-it-all has an average age of 44 years. The members of this group rarely see a doctor but are very concerned about their health (p. 81). In addition to the health record app, the symptom checker is relatively important to them. They are often concerned with monitoring their general state of health (p. 82).

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Management Summary

Health Precautioner

The Health Precautioner lives a relatively healthy life and pays particular attention to their diet. The members of this group rarely visit a doctor. When they do, they are primarily interested in preventive check-ups (p. 83). They are less interested in medical apps and their functions (p. 84).

Health Pragmatist

The Health Pragmatist rarely visits a doctor. Nevertheless, the members of this group occasionally wish to live healthier and pay particular attention to a healthy diet (p. 85). The Health Pragmatist is hardly interested in using specialised medical apps, e.g., for medical counseling or to improve mental health (p. 86).

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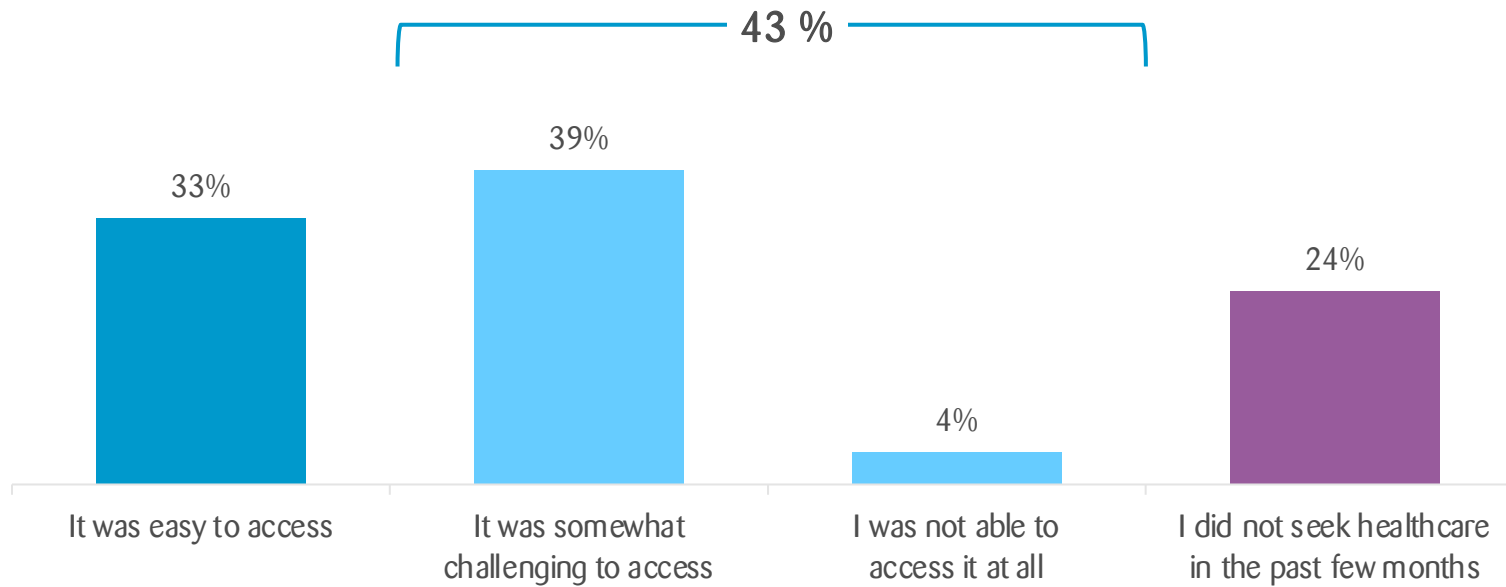
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Access to healthcare services

Access to healthcare services



More than 40 per cent of the population have experienced difficulties accessing healthcare services in the past six months.

Q1: Have you encountered any challenges or difficulties in accessing healthcare services (e.g., appointments, medical advice, emergency care) in the last six months?

Base: All respondents n=1,000

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Access to healthcare services

Access to healthcare services

Yearly household income*	Under £20,000	£20,000 - £29,999	£30,000 - £49,999	£50,000 - £69,999	Above £70,000
Base:	243	212	285	118	96
It was easy to access	31%	34%	32%	33%	46%
It was somewhat challenging to access	33%	37%	44%	46%	38%
I was not able to access it at all	4%	4%	3%	0%	1%
I did not seek healthcare in the past few months	32%	25%	21%	21%	15%

Respondents with high income had easier access to healthcare services.

Q1: Have you encountered any challenges or difficulties in accessing healthcare services (e.g., appointments, medical advice, emergency care) in the last six months?

Base: All respondents n=1,000, *not shown: no response

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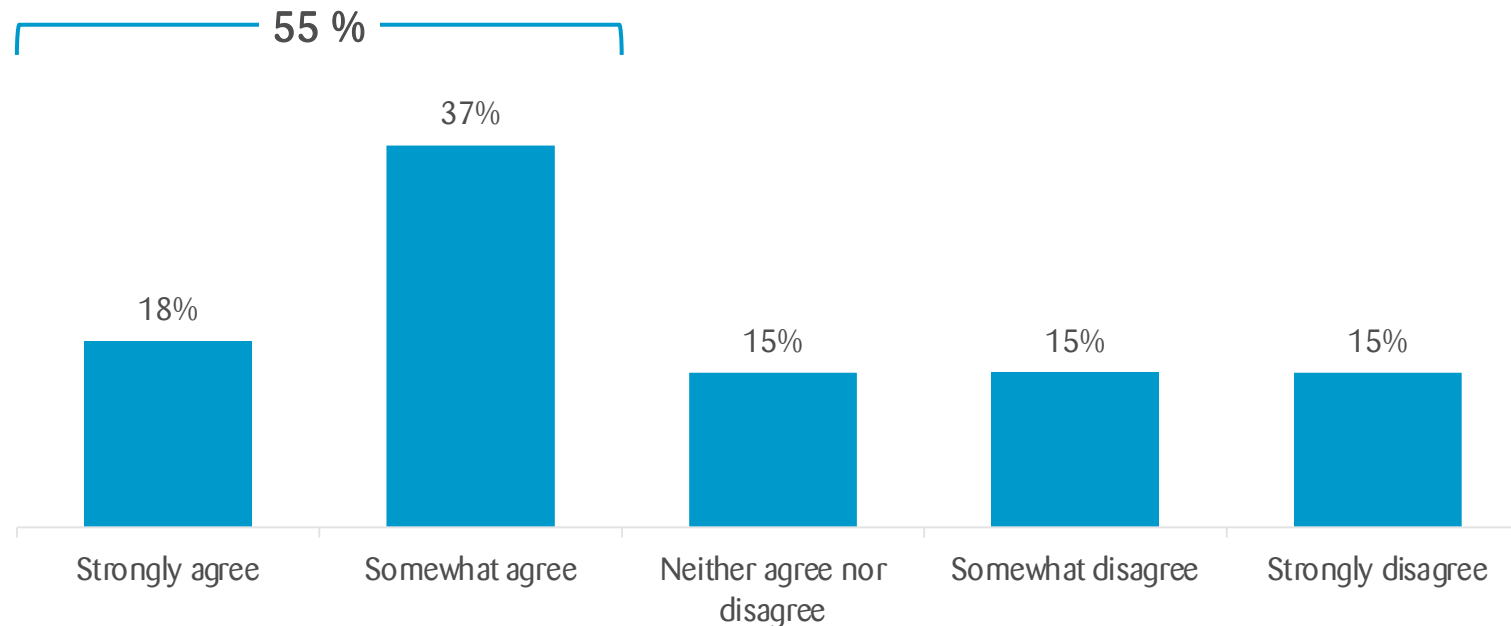
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Health app usage

I have used an app and/or the Internet instead of going to a medical professional for self-diagnosis and/or treatment in the past six months.



Q2: To what extent do you agree or disagree with the following statement: I have used an app and/or the Internet instead of going to a medical professional for self-diagnosis and/or treatment in the past six months.

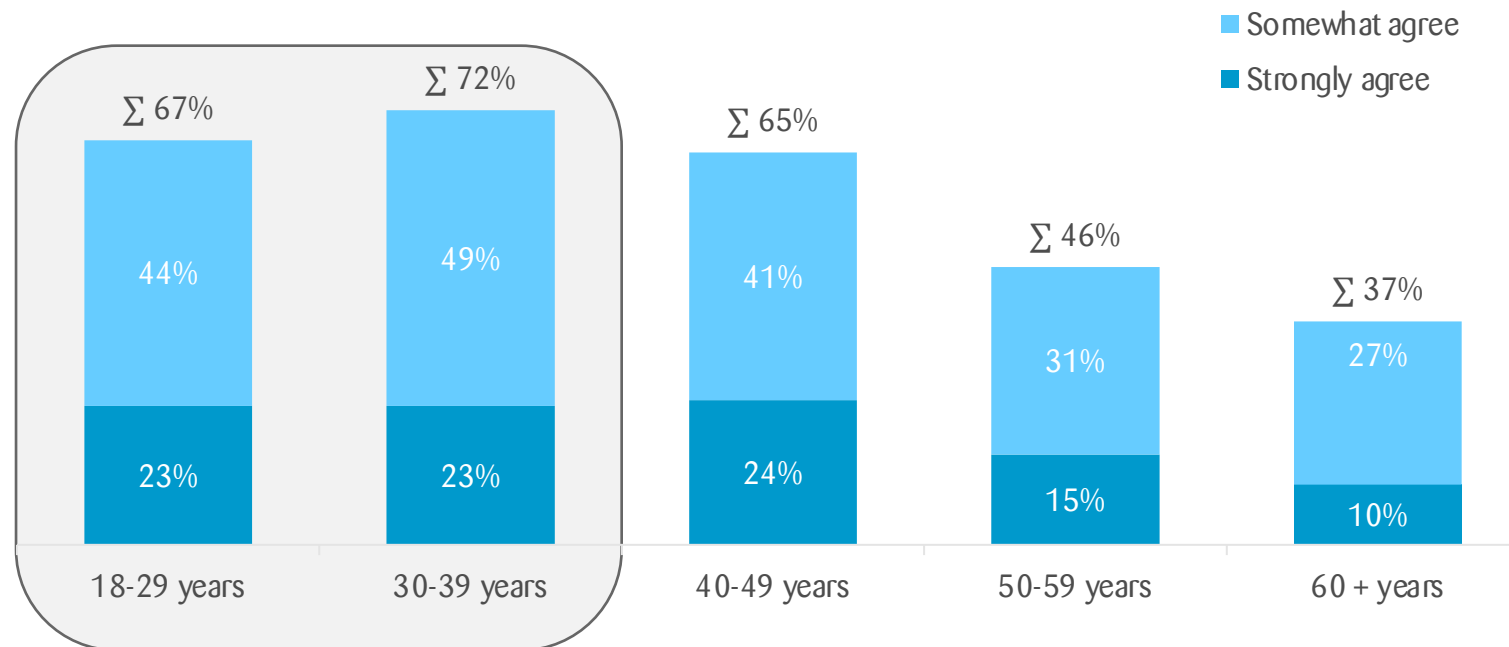
Base: All respondents n=1,000

More than 50 per cent has used an app or the Internet for self-diagnosis or treatment in the past six months.

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Health app usage

I have used an app and/or the Internet instead of going to a medical professional for self-diagnosis and/or treatment in the past six months.



Q2: To what extent do you agree or disagree with the following statement: I have used an app and/or the Internet instead of going to a medical professional for self-diagnosis and/or treatment in the past six months.

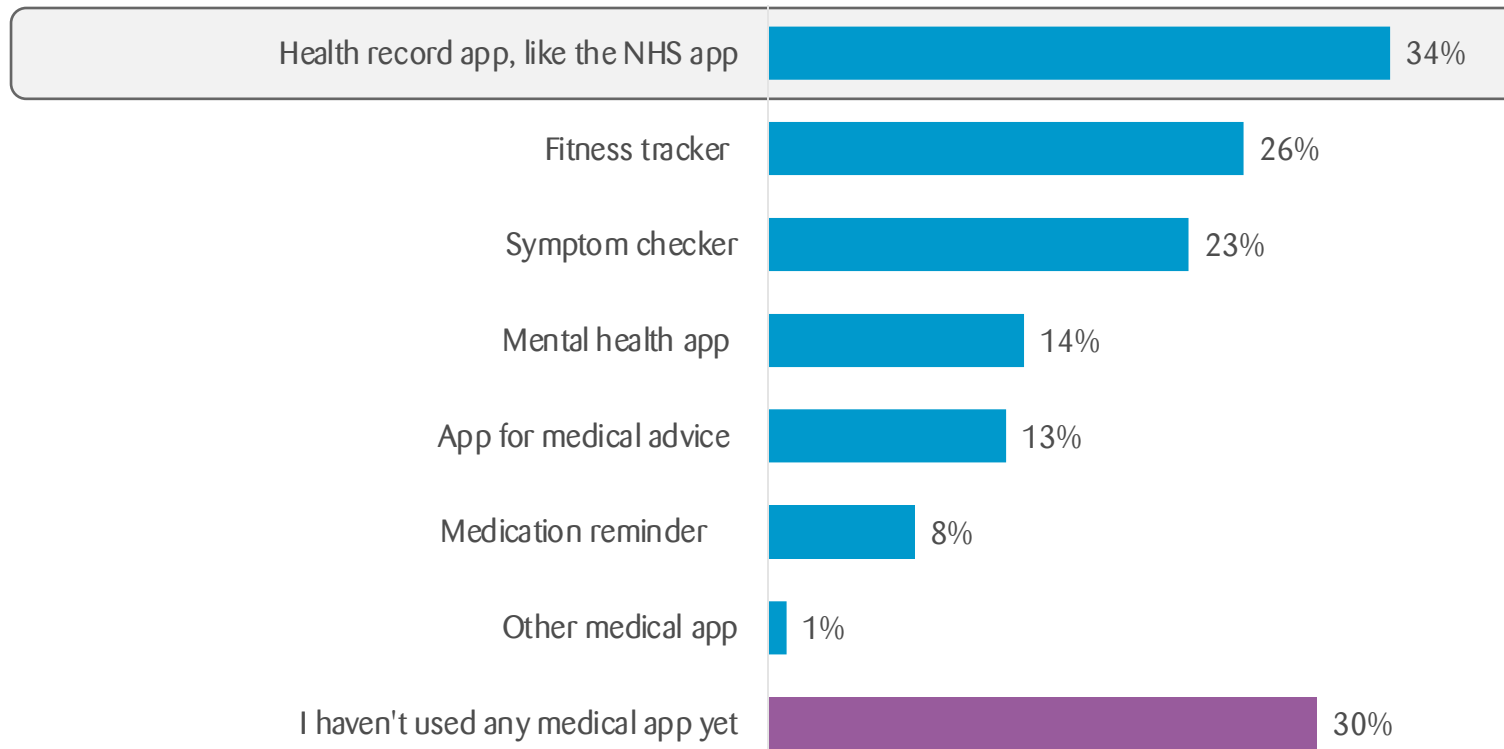
Base: All respondents n=1,000

Especially younger people have used an app or the Internet for self-diagnosis or treatment instead of seeing a doctor.

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Health app usage

Use of medical apps



Q3: Which of the following medical apps have you used, and how beneficial do you find them? Please select all that apply and rate their benefits on a scale of 1 to 5, with 1 being 'not at all beneficial' and 5 being 'extremely beneficial.'

Base: All respondents n=1,000

A health record app like the NHS app is the most frequently used medical application.

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Health app usage

Use of medical apps

Age	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
Health record app, like the NHS app	42%	37%	36%	30%	28%
Fitness tracker	36%	34%	32%	21%	15%
Symptom checker	28%	29%	26%	19%	18%
Mental health app	25%	27%	12%	6%	5%
App for medical advice	15%	20%	14%	7%	9%
Medication reminder	18%	17%	4%	5%	5%
Other medical app	2%	1%	1%	2%	2%
I haven't used any medical app yet	14%	17%	26%	36%	46%

Q3: Which of the following medical apps have you used, and how beneficial do you find them? Please select all that apply and rate their benefits on a scale of 1 to 5, with 1 being 'not at all beneficial' and 5 being 'extremely beneficial.'

Base: All respondents n=1,000

Medical apps are most frequently used by younger people.

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Health app usage

Use of medical apps

Yearly household income*	Under £20,000	£20,000 - £29,999	£30,000 - £49,999	£50,000 - £69,999	Above £70,000
Base:	243	212	285	118	96
Health record app, like the NHS app	25%	34%	38%	42%	41%
Fitness tracker	17%	23%	28%	35%	40%
Symptom checker	17%	25%	24%	25%	28%
Mental health app	13%	9%	16%	16%	20%
App for medical advice	7%	13%	15%	14%	21%
Medication reminder	7%	10%	8%	10%	16%
Other medical app	1%	1%	1%	2%	3%
I haven't used any medical app yet	42%	30%	24%	19%	22%

Usage of medical apps increases with higher income.

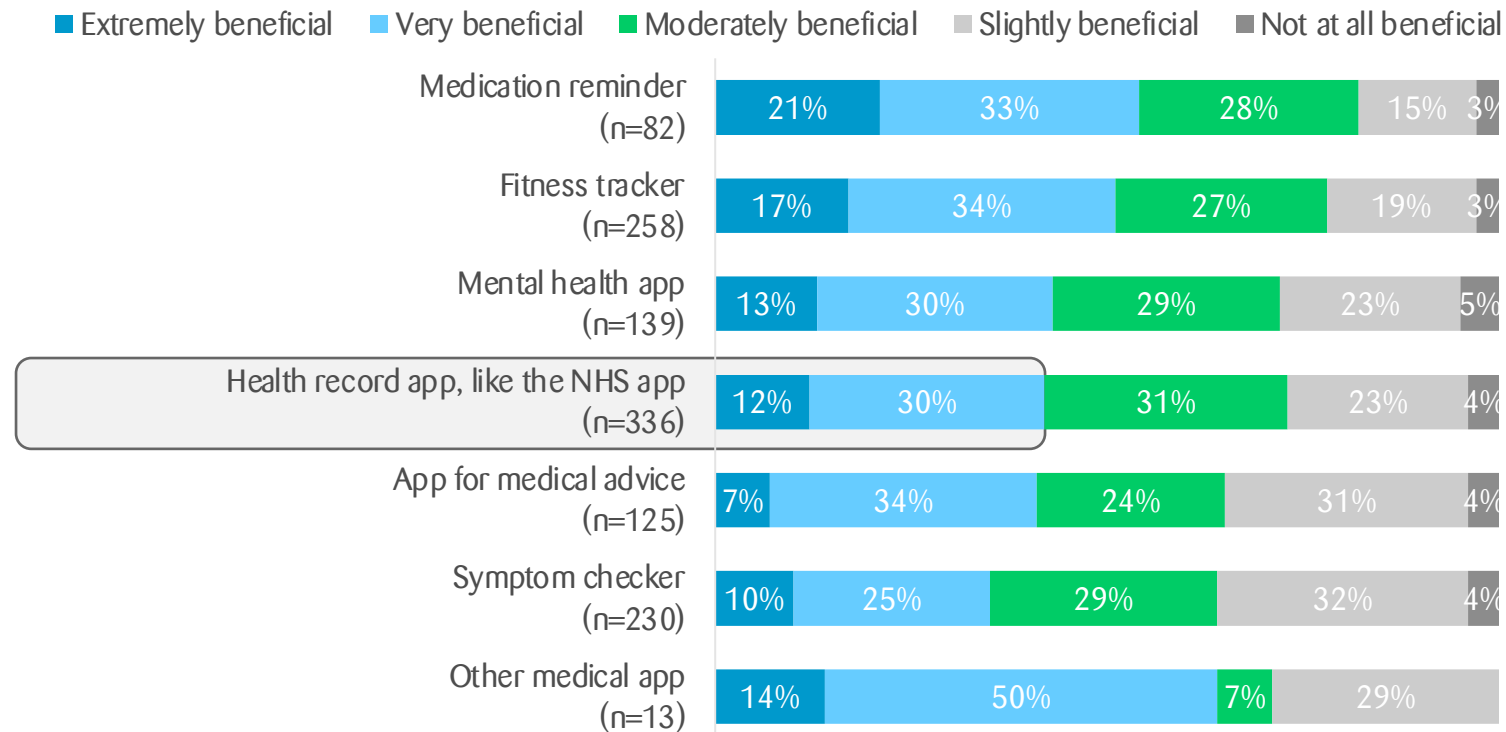
Q3: Which of the following medical apps have you used, and how beneficial do you find them? Please select all that apply and rate their benefits on a scale of 1 to 5, with 1 being 'not at all beneficial' and 5 being 'extremely beneficial.'

Base: All respondents n=1,000, *not shown: no response

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Health app usage

Use of medical apps



Q3: Which of the following medical apps have you used, and how beneficial do you find them? Please select all that apply and rate their benefits on a scale of 1 to 5, with 1 being 'not at all beneficial' and 5 being 'extremely beneficial.'

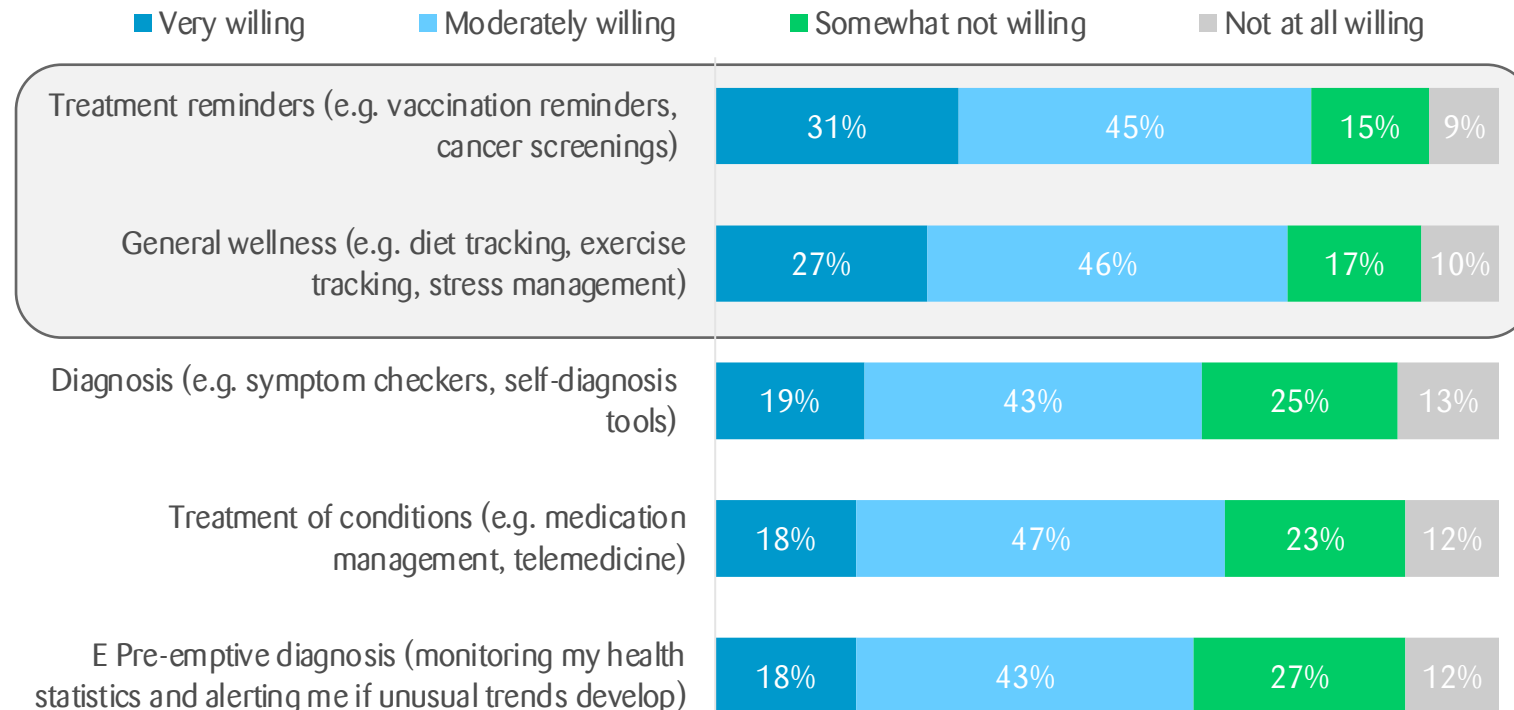
Base: Respondents using the respective apps

Less than 50 per cent see a high value in a health record app like the NHS app.

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Health app usage

Use of medical apps



Q4: How willing are you to use devices and apps for the following healthcare purposes? Please rate your willingness on a scale of 1 to 4, with 1 being 'not at all willing' and 4 being 'very willing.'

Base: All respondents n=1,000

Willingness to use medical apps is highest for treatment reminders and general wellness.

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Health app usage

Use of medical apps

Age: Very willing	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
Treatment reminders (e.g. vaccination reminders, cancer screenings)	30%	31%	33%	36%	32%
General wellness (e.g. diet tracking, exercise tracking, stress management)	25%	32%	29%	27%	22%
Diagnosis (e.g. symptom checkers, self-diagnosis tools)	22%	24%	21%	18%	15%
Treatment of conditions (e.g. medication management, telemedicine)	22%	20%	18%	18%	14%
E Pre-emptive diagnosis (monitoring my health statistics and alerting me if unusual trends develop)	22%	21%	18%	17%	16%

Apps for general wellness (e.g. diet tracking, exercise tracking, stress management) are considered useful especially by age group 30 to 40.

Q4: How willing are you to use devices and apps for the following healthcare purposes? Please rate your willingness on a scale of 1 to 4, with 1 being 'not at all willing' and 4 being 'very willing.'

Base: All respondents n=1,000

Health-Study 2023 | UK

Health app usage

Use of medical apps

Yearly household income*: Very willing	Under £20,000	£20,000 - £29,999	£30,000 - £49,999	£50,000 - £69,999	Above £70,000
Base:	243	212	285	118	96
Treatment reminders (e.g. vaccination reminders, cancer screenings)	29%	36%	32%	37%	37%
General wellness (e.g. diet tracking, exercise tracking, stress management)	21%	24%	29%	30%	36%
Diagnosis (e.g. symptom checkers, self-diagnosis tools)	13%	17%	23%	24%	22%
Treatment of conditions (e.g. medication management, telemedicine)	18%	19%	19%	20%	15%
E Pre-emptive diagnosis (monitoring my health statistics and alerting me if unusual trends develop)	13%	20%	21%	21%	22%

Especially respondents with a high income consider using an app for general wellness.

Q4: How willing are you to use devices and apps for the following healthcare purposes? Please rate your willingness on a scale of 1 to 4, with 1 being 'not at all willing' and 4 being 'very willing.'

Base: All respondents n=1,000, *not shown: no response

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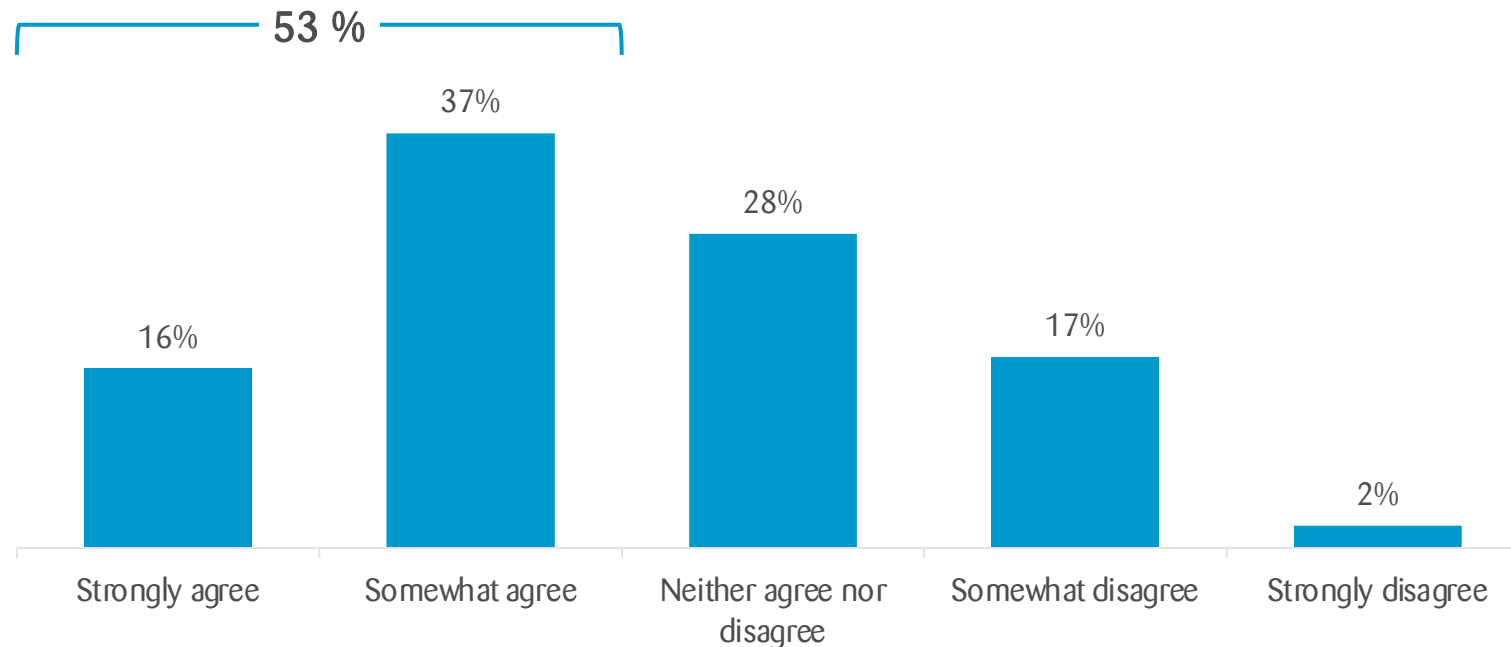
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Trusting health apps

I don't believe apps and/or devices can accurately measure my health.



Q5: To what extent do you agree or disagree with the following statement: I don't believe apps and/or devices can accurately measure my health.

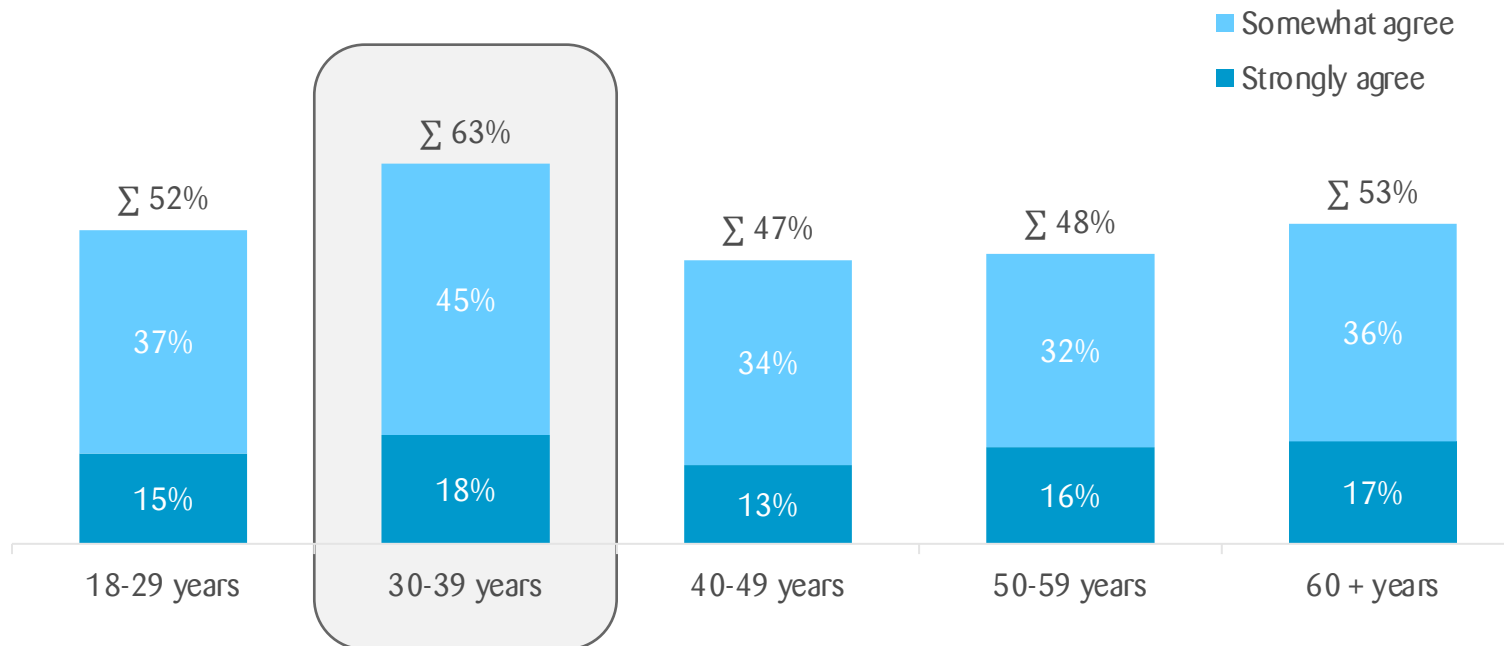
Base: All respondents n=1,000

Roughly half of the population does not believe that apps/devices can accurately monitor their health.

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Trusting health apps

I don't believe apps and/or devices can accurately measure my health.



30 to 39 year old respondents are more skeptical as to the abilities of measuring apps/devices.

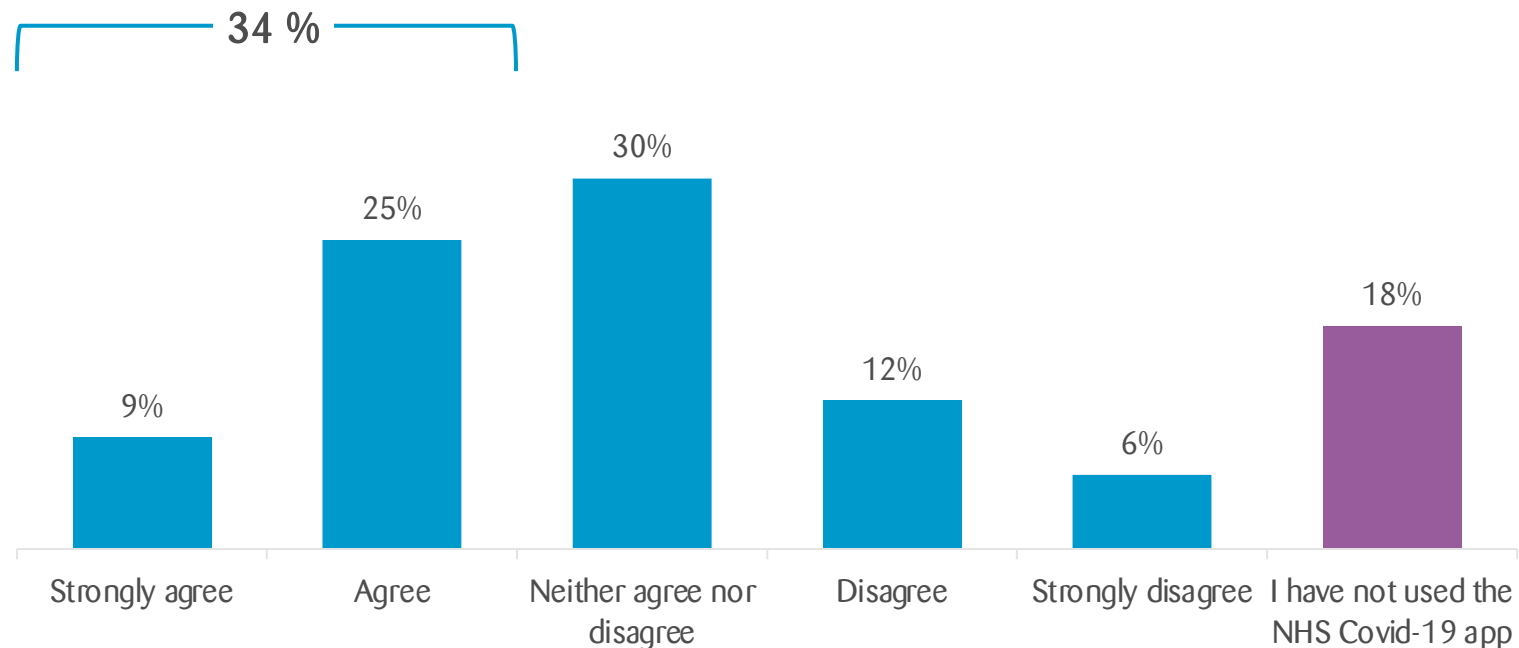
Q5: To what extent do you agree or disagree with the following statement: I don't believe apps and/or devices can accurately measure my health.

Base: All respondents n=1,000

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Trusting health apps

Using the NHS Covid-19 app has positively changed my attitude towards using apps ON MY MOBILE PHONE to help manage my health.



Q6: To what extent do you agree or disagree with the following statement: Using the NHS Covid-19 app has positively changed my attitude towards using apps ON MY MOBILE PHONE to help manage my health.

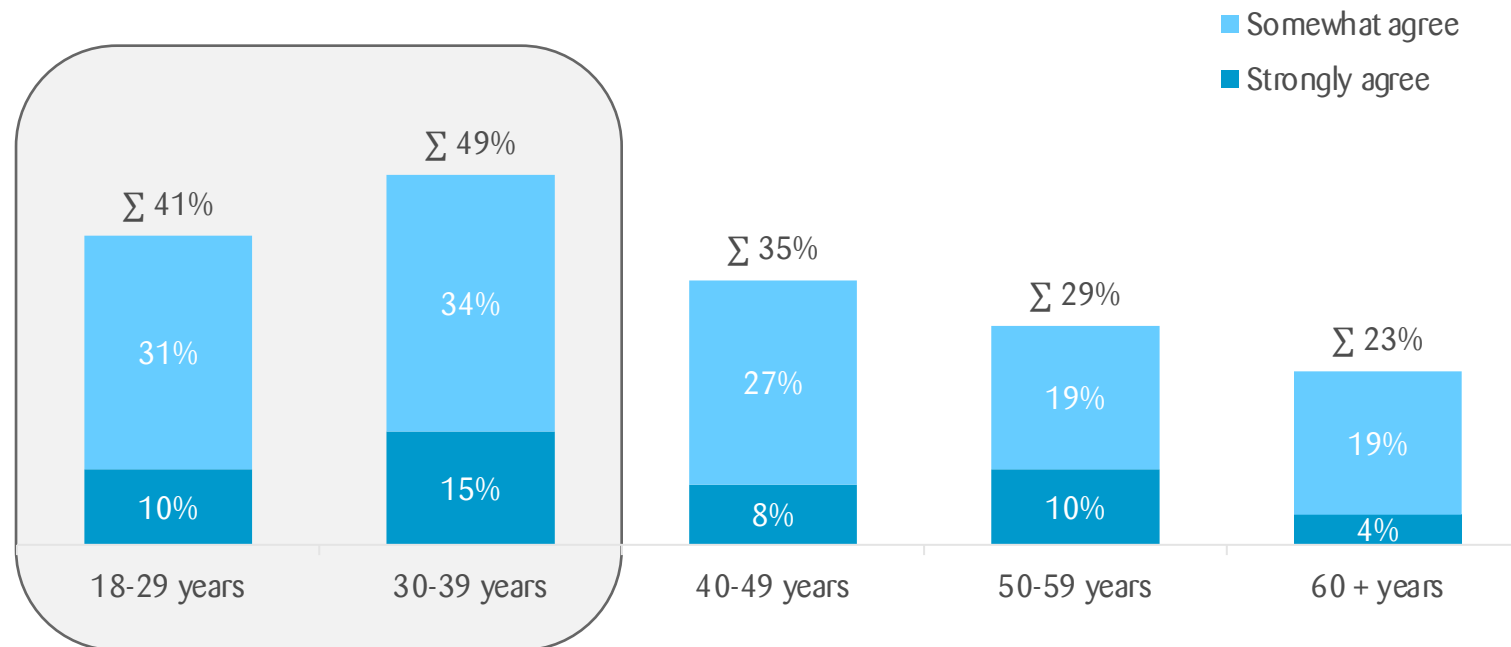
Base: All respondents n=1,000

Once third of the respondents have a more positive attitude towards apps after using the NHS Covid-19 app on their mobile phones.

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Trusting health apps

Using the NHS Covid-19 app has positively changed my attitude towards using apps ON MY MOBILE PHONE to help manage my health.



Especially younger people have changed their attitude after using the Covid-19 app.

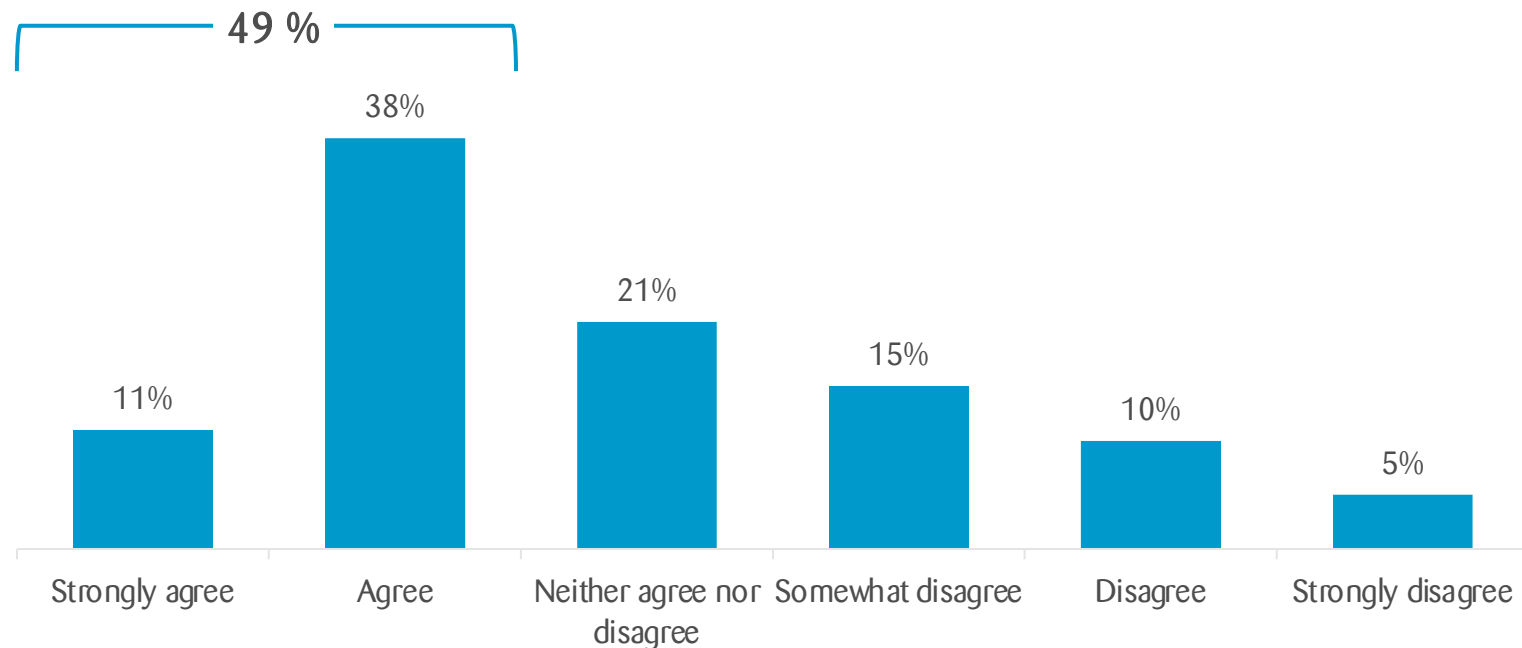
Q6: To what extent do you agree or disagree with the following statement: Using the NHS Covid-19 app has positively changed my attitude towards using apps ON MY MOBILE PHONE to help manage my health.

Base: All respondents n=1,000

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Trusting health apps

I would feel comfortable if my medical healthcare provider prescribed me an app to help manage my health.



Q7: To what extent do you agree or disagree with the following statement: I would feel comfortable if my medical healthcare provider prescribed me an app to help manage my health.

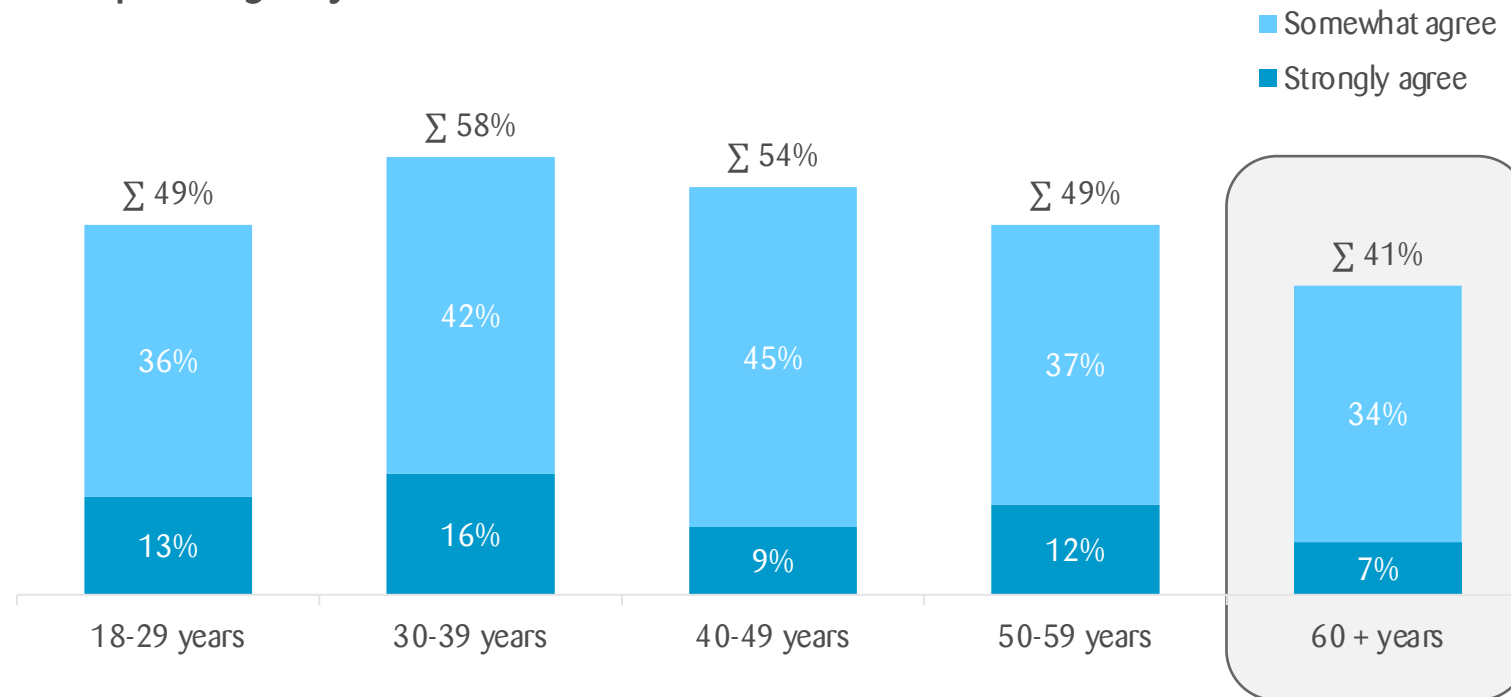
Base: All respondents n=1,000

Roughly one half of the respondents would feel comfortable about using a prescribed app for health management.

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Trusting health apps

I would feel comfortable if my medical healthcare provider prescribed me an app to help manage my health.



More younger than older people would feel comfortable about using a health management app.

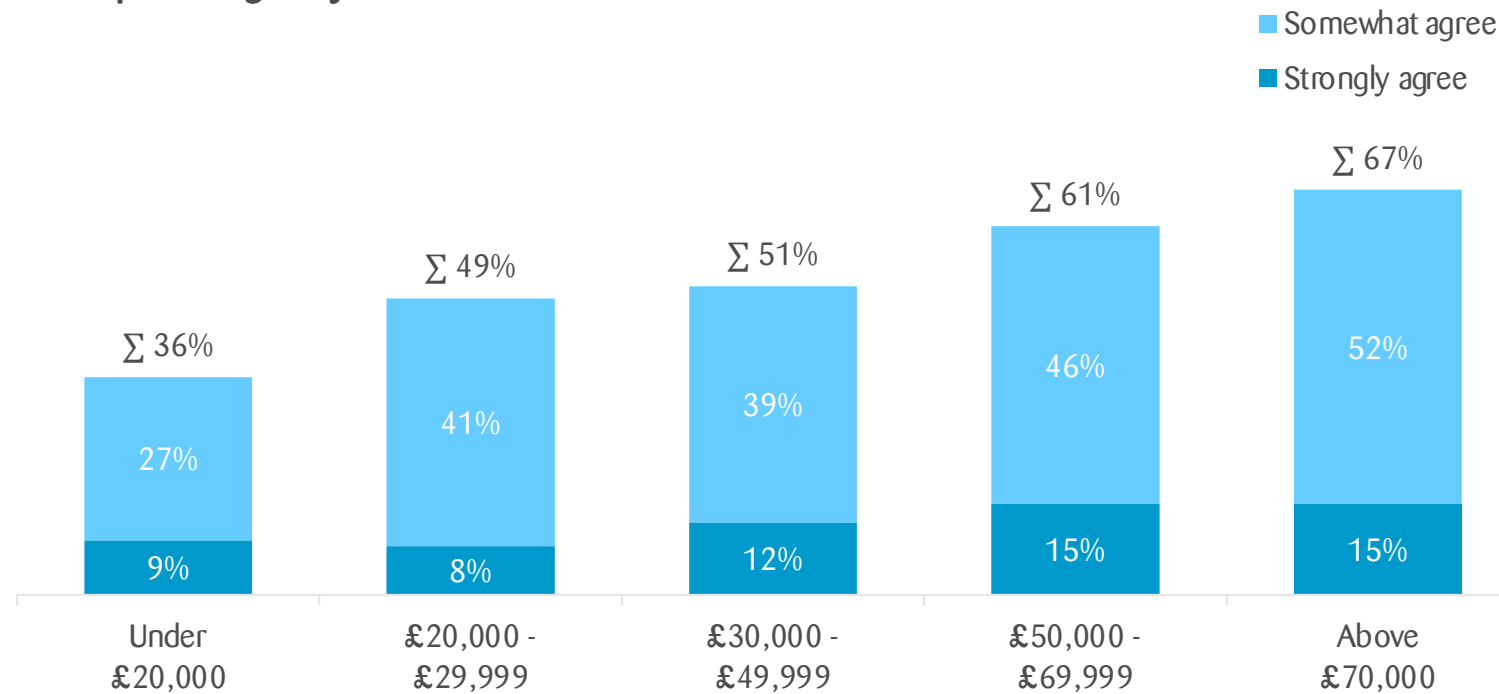
Q7: To what extent do you agree or disagree with the following statement: I would feel comfortable if my medical healthcare provider prescribed me an app to help manage my health.

Base: All respondents n=1,000

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Trusting health apps

I would feel comfortable if my medical healthcare provider prescribed me an app to help manage my health.



Q7: To what extent do you agree or disagree with the following statement: I would feel comfortable if my medical healthcare provider prescribed me an app to help manage my health.

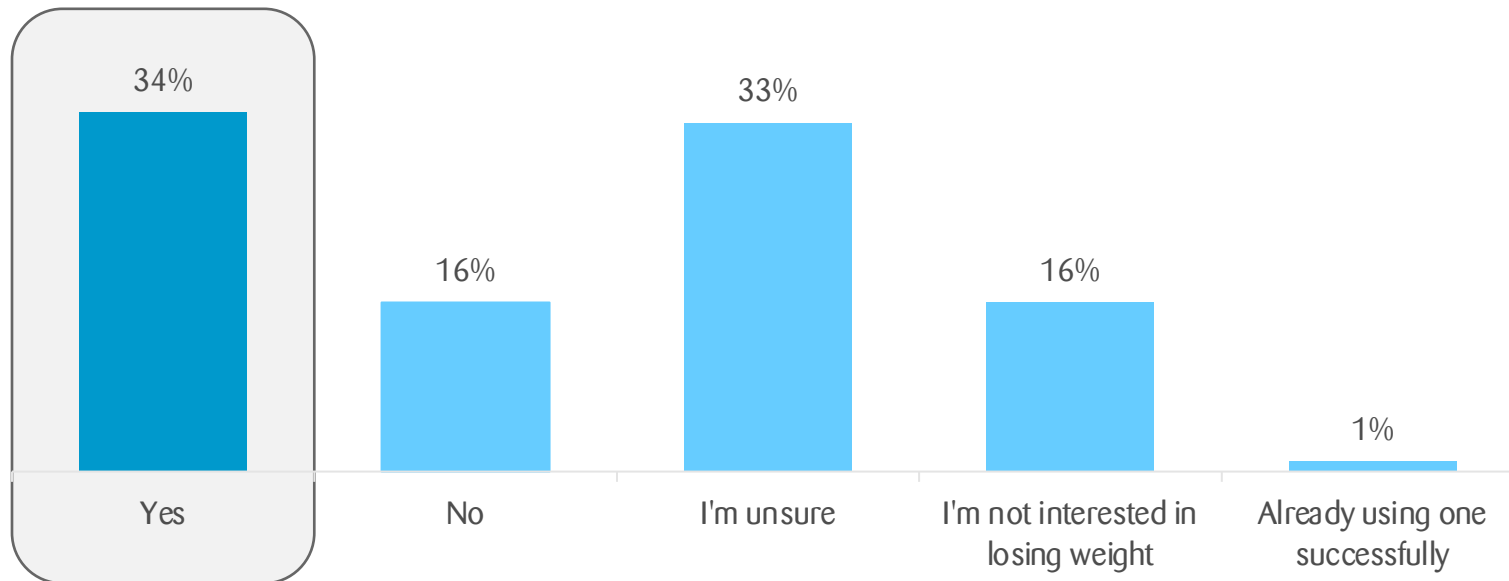
Base: All respondents n=1,000; not shown: no response

Respondents with a higher income feel more comfortable about using a health management app.

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Trusting health apps

Does an app help you lose weight



Q8: Do you believe a weight loss app prescribed to you by a doctor or dietician could help you lose weight (if you needed to)?

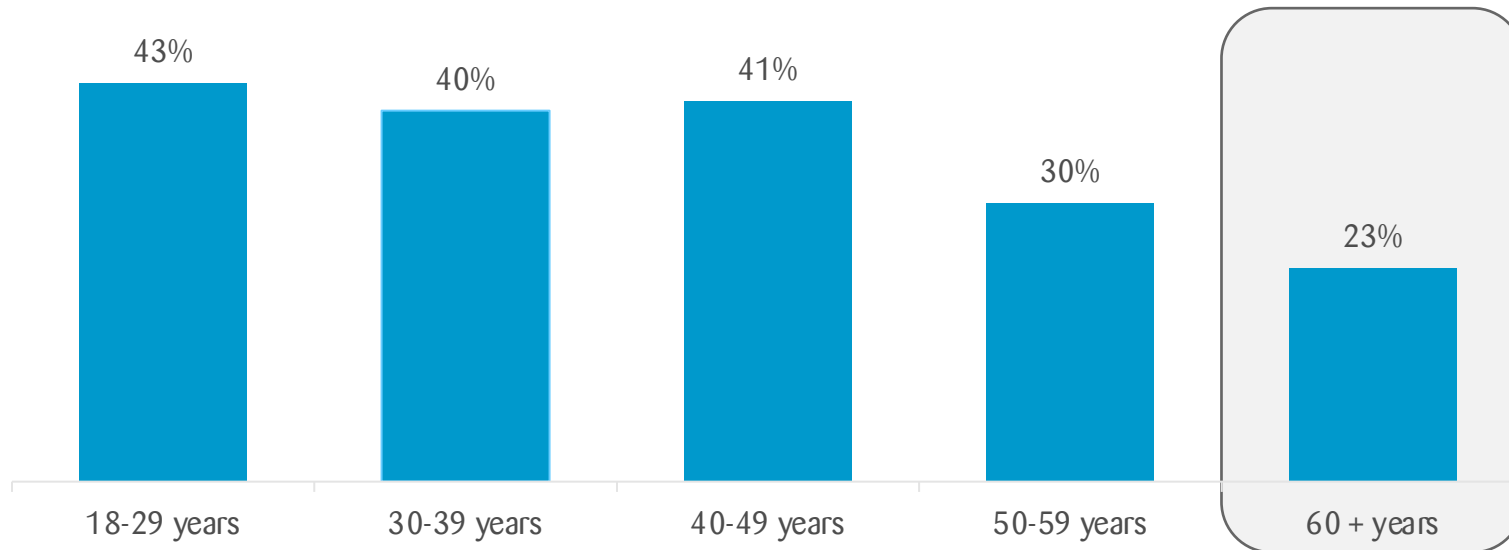
Base: All respondents n=1,000

A third of all respondents believe a weight loss app could help them.

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Trusting health apps

Does an app help you lose weight: Yes



Q8: Do you believe a weight loss app prescribed to you by a doctor or dietician could help you lose weight (if you needed to)?

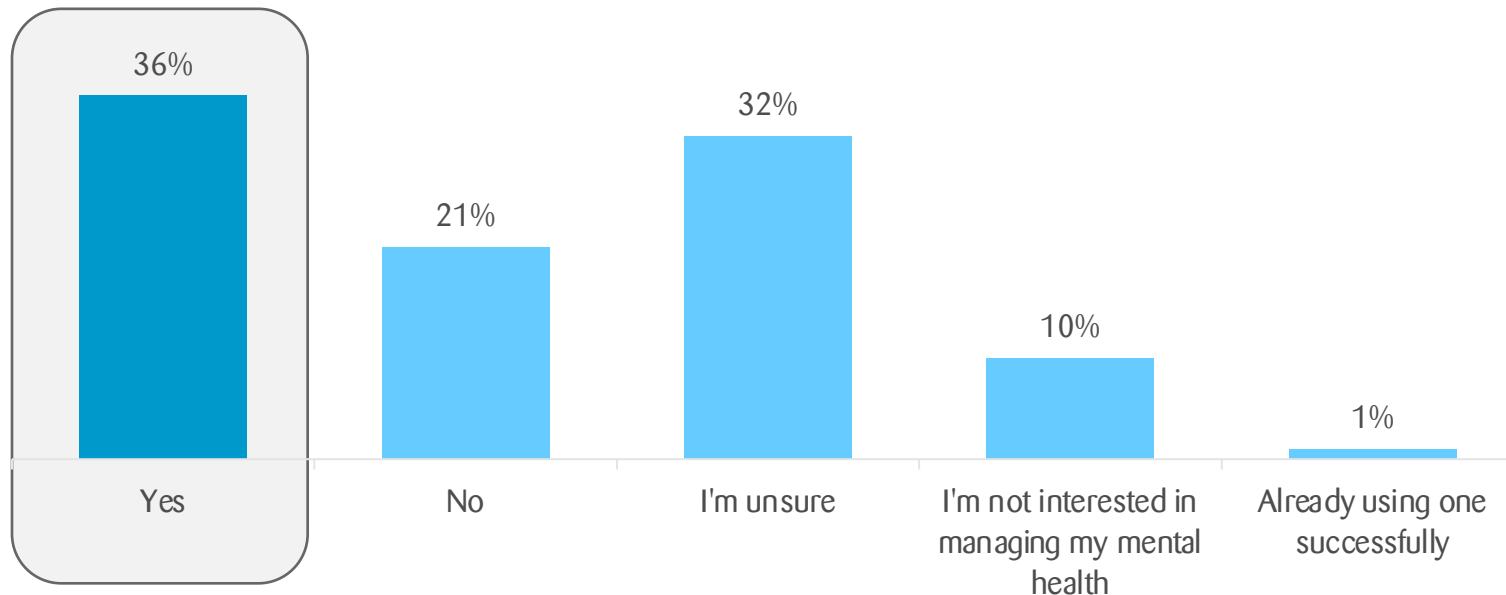
Base: All respondents n=1,000

Older people are more skeptical when it comes to using a weight loss app.

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Trusting health apps

Does a wellness app help improve mental health



Q9: Do you believe a wellness app prescribed by your doctor could help you manage better your mental health?

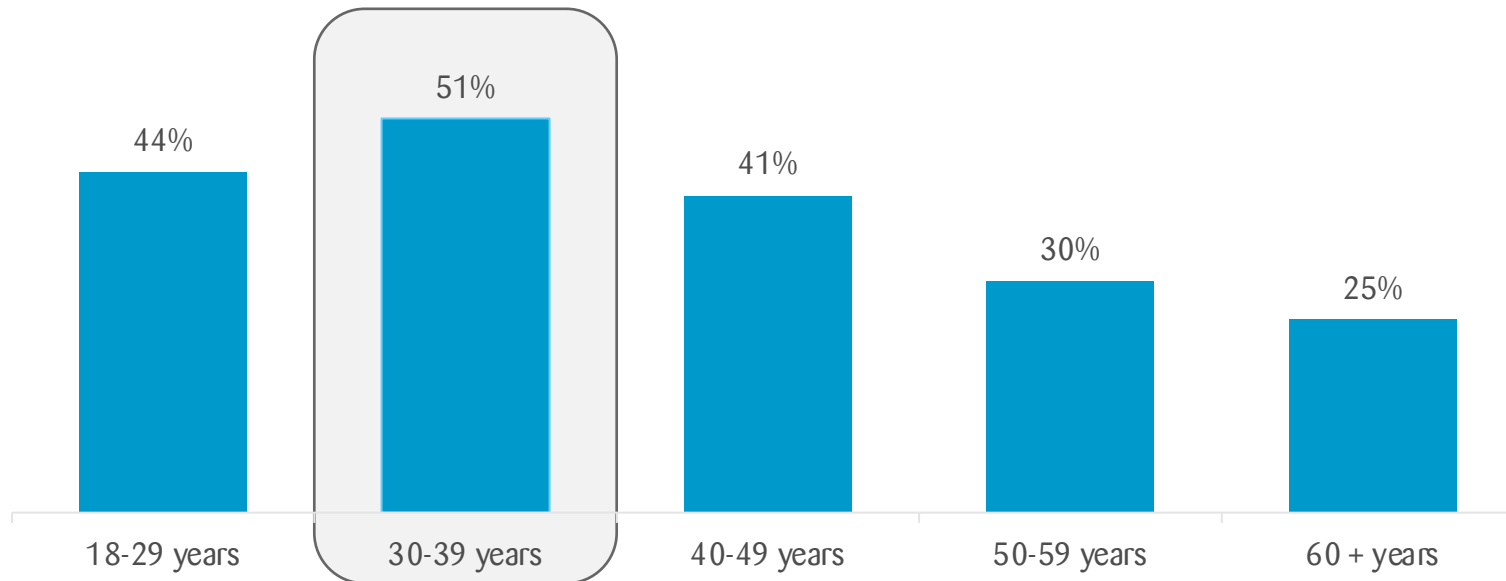
Base: All respondents n=1,000

One out of three thinks a wellness app could help improve their mental health management

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Trusting health apps

Does a wellness app help improve mental health: Yes



Q9: Do you believe a wellness app prescribed by your doctor could help you manage better your mental health?

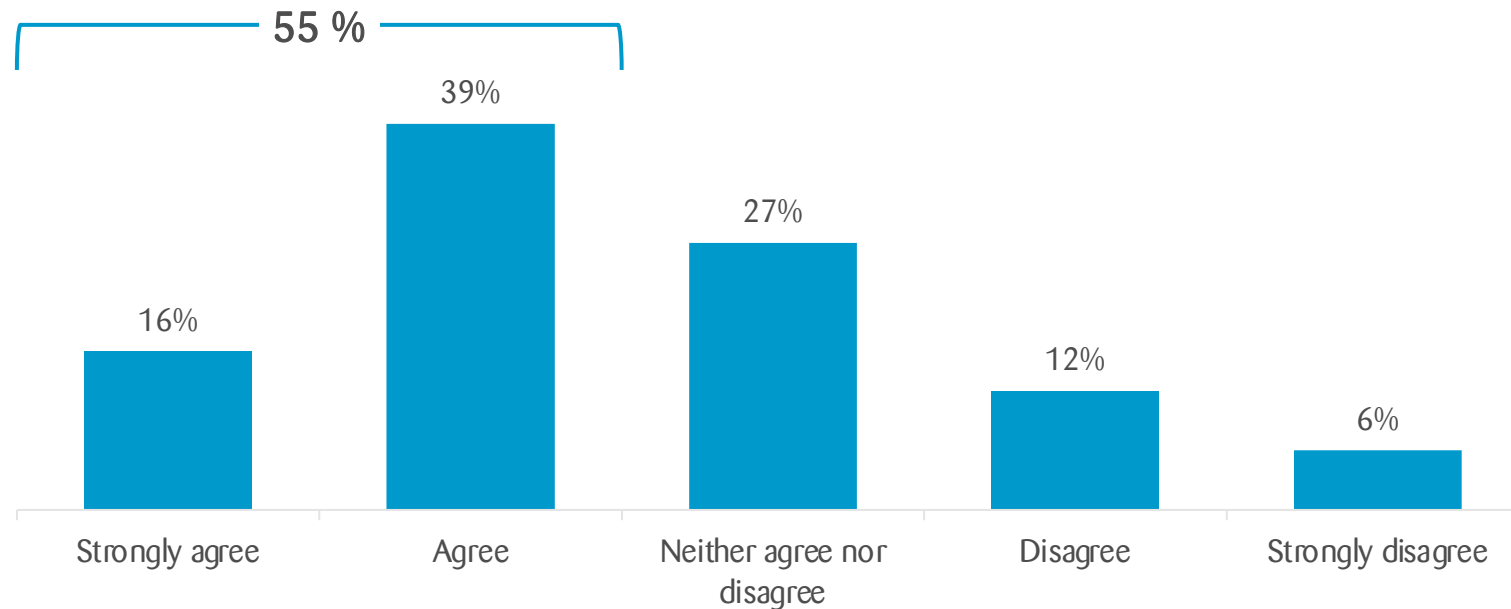
Base: All respondents n=1,000

Half of the 30 to 39 year old respondents think an app could improve their mental health.

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Trusting health apps

I would feel comfortable if my doctor prescribed me an app to help manage my mental health (e.g. by providing reminders to take medication, monitoring symptoms or support with a therapy).



Q10: To what extent do you agree or disagree with the following statement: I would feel comfortable if my doctor prescribed me an app to help manage my mental health (e.g. by providing reminders to take medication, monitoring symptoms or support with a therapy).

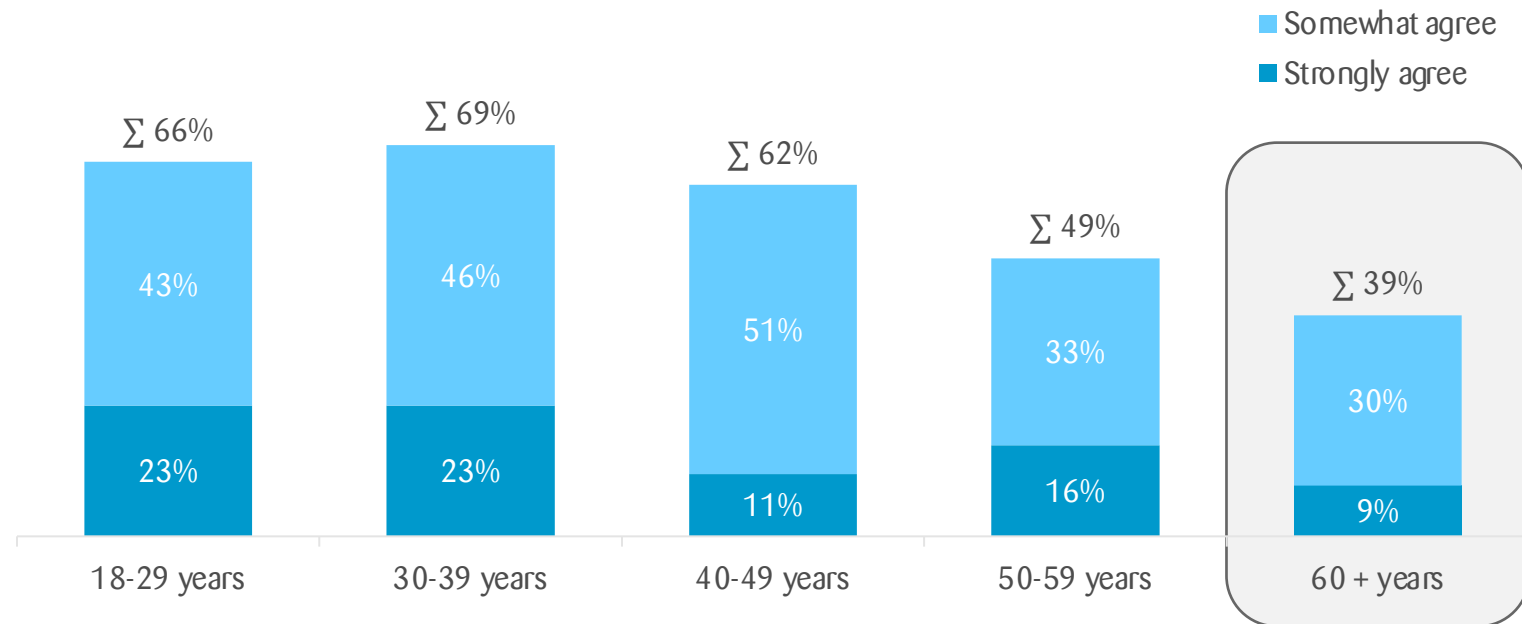
Base: All respondents n=1,000

More than 50 per cent would feel comfortable if being prescribed a mental health app.

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Trusting health apps

I would feel comfortable if my doctor prescribed me an app to help manage my mental health (e.g. by providing reminders to take medication, monitoring symptoms or support with a therapy).



Q10: To what extent do you agree or disagree with the following statement: I would feel comfortable if my doctor prescribed me an app to help manage my mental health (e.g. by providing reminders to take medication, monitoring symptoms or support with a therapy).
Base: All respondents n=1,000

Older people would feel less comfortable about being prescribed a mental health app.

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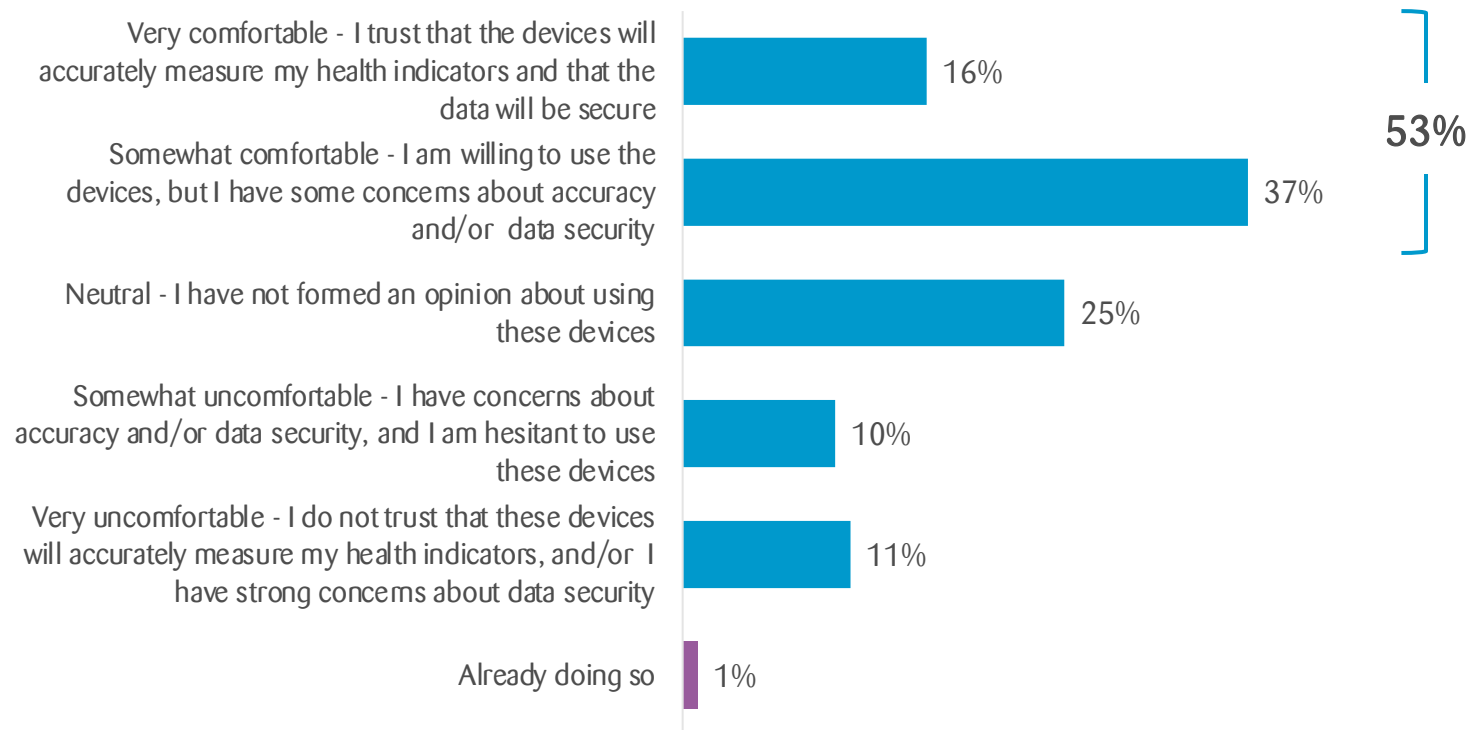
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Digital health services

Monitoring health with mobile devices



More than half of the respondents would feel comfortable about connecting their mobile phone to a smartwatch or virtual assistant for monitoring their health.

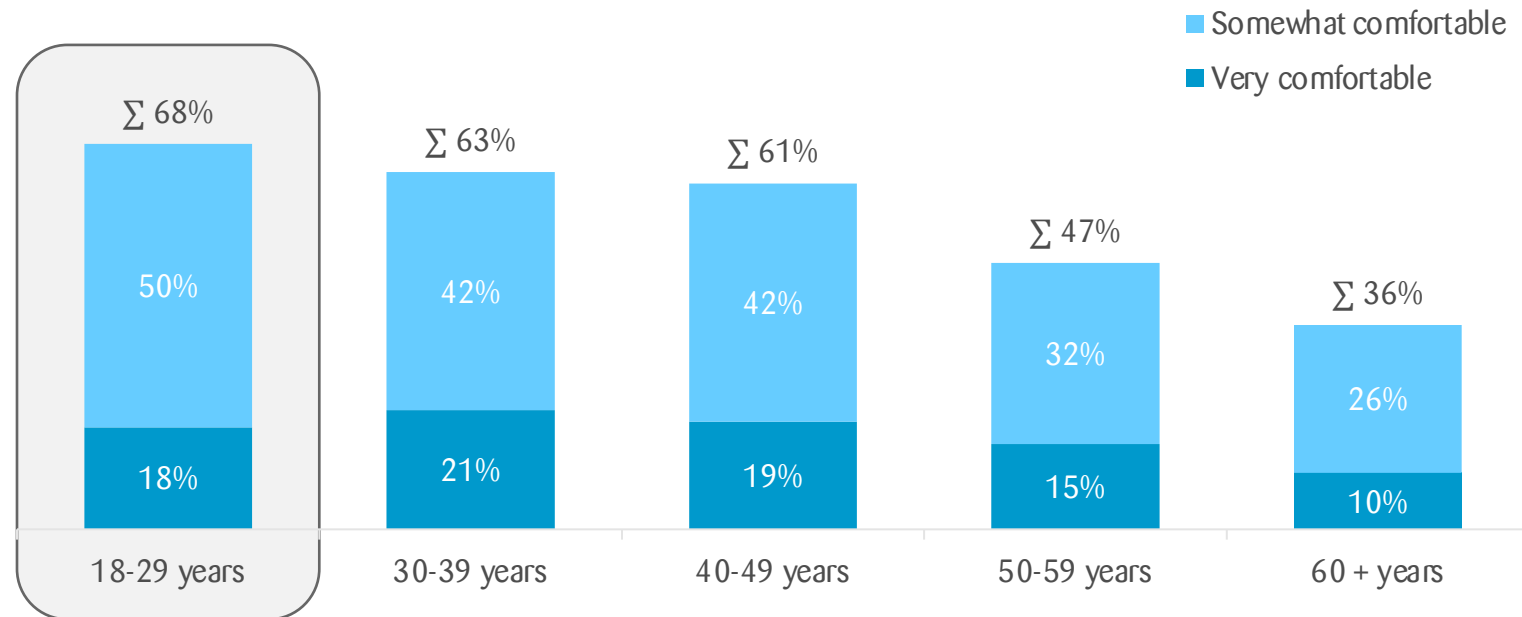
Q11: How comfortable are you with using your phone to connect to devices like a smartwatch or virtual voice assistant like Alexa to monitor your health?

Base: All respondents n=1,000

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Digital health services

Monitoring health with mobile devices



Q11: How comfortable are you with using your phone to connect to devices like a smartwatch or virtual voice assistant like Alexa to monitor your health?

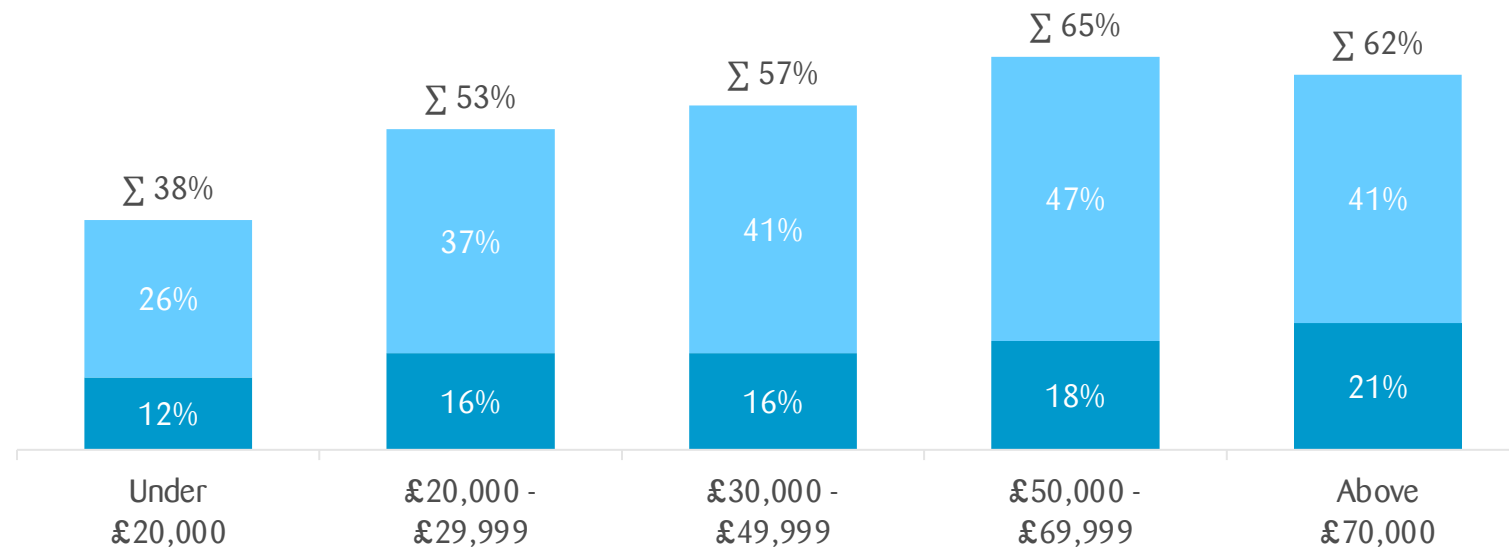
Base: All respondents n=1,000

Especially younger people under the age of 30 would feel comfortable about connecting their mobile phone to a smartwatch or virtual assistant for health monitoring purposes.

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Digital health services

Monitoring health with mobile devices



Q11: How comfortable are you with using your phone to connect to devices like a smartwatch or virtual voice assistant like Alexa to monitor your health?

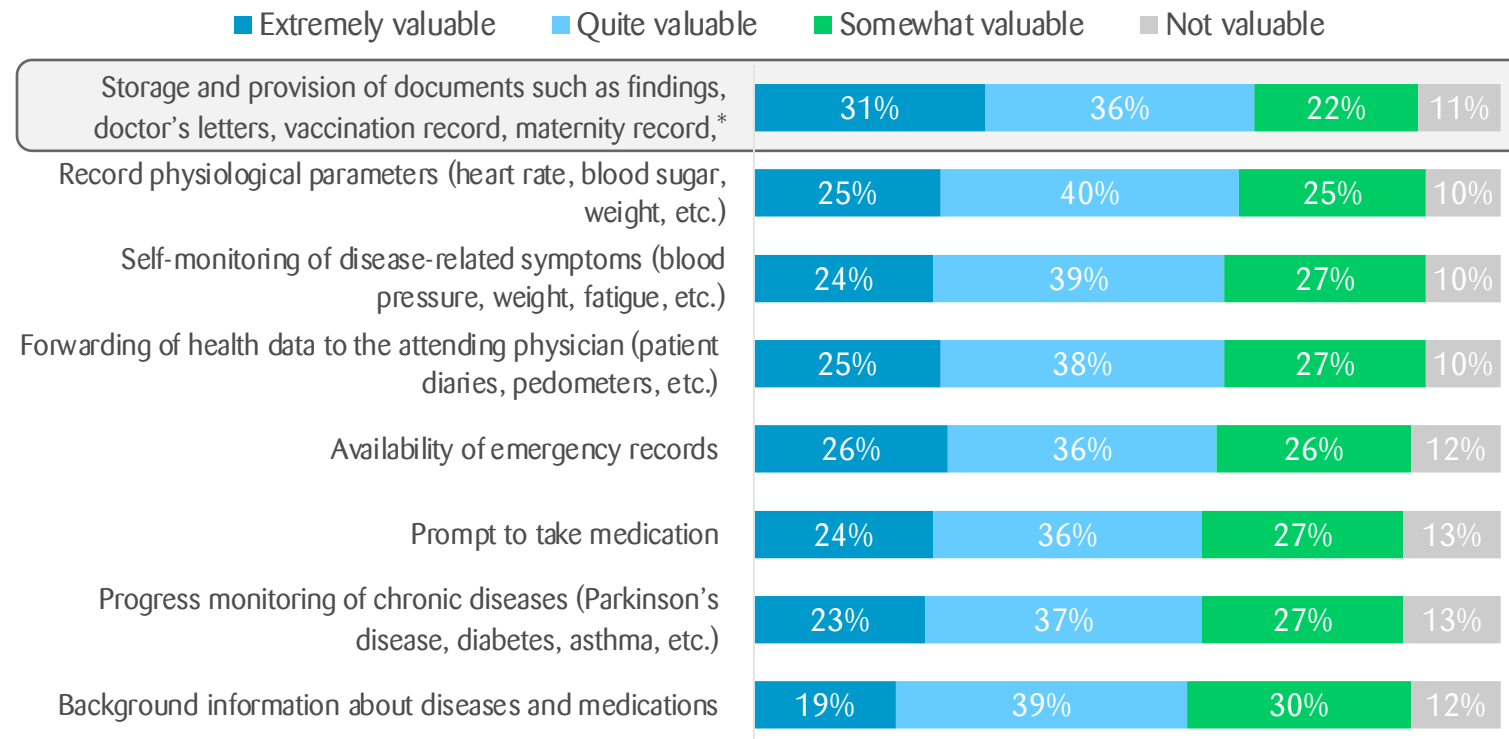
Base: All respondents n=1,000; not shown: no response

Respondents with a higher income would feel more comfortable about connecting their mobile phone to a smartwatch or virtual assistant for health monitoring.

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Digital health services

Importance of functions of a health app (1/2)



Q12: If there was only one app to manage your personal health, what features would you find most valuable?

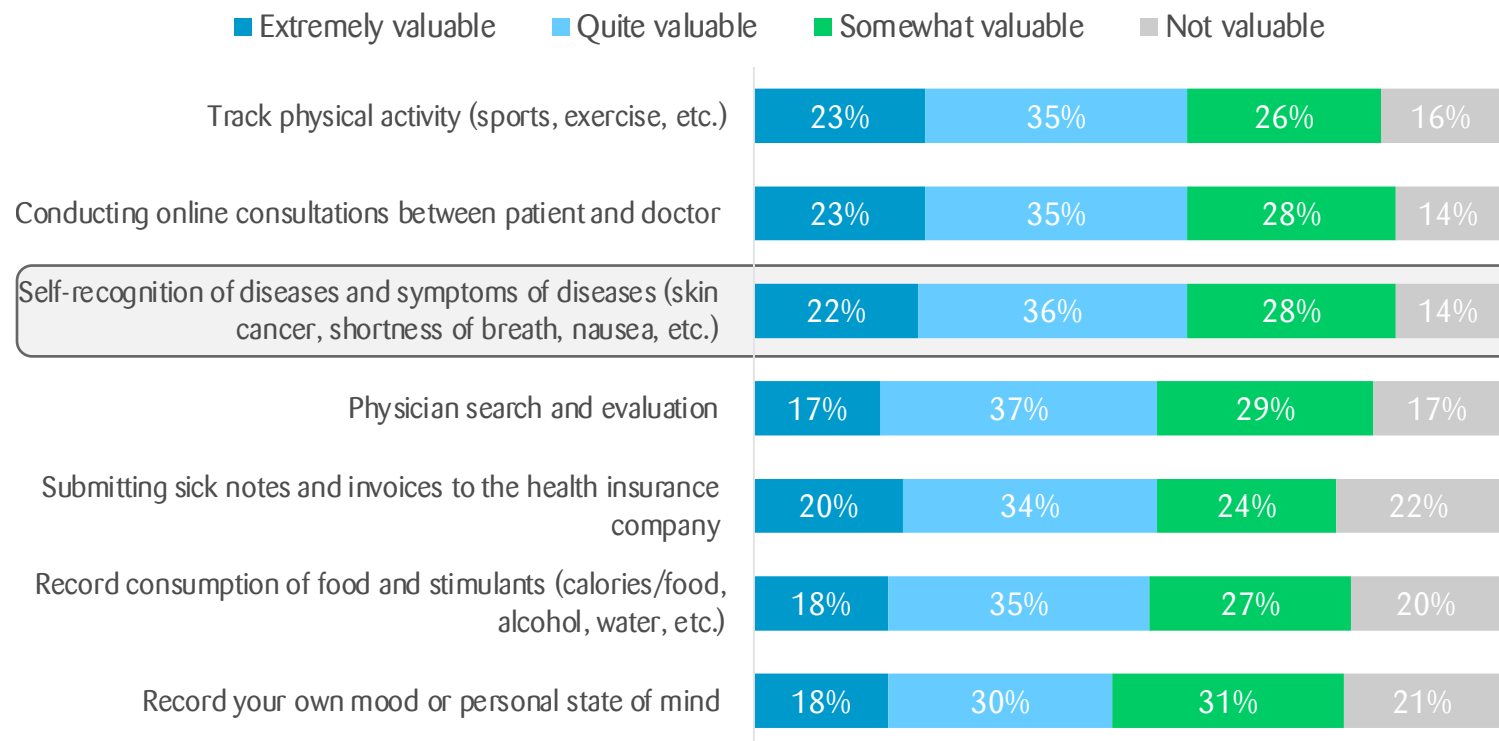
Base: All respondents n=1,000, *...dental bonus booklet, children's examination booklet, etc.

Storage and provision of documents such as doctor's letters and vaccination records is just one of many health app functionalities.

Health-Study 2023 | UK

Digital health services

Importance of functions of a health app (2/2)



Q12: If there was only one app to manage your personal health, what features would you find most valuable?

Base: All respondents n=1,000

Almost 60 per cent consider self-recognition of diseases and symptoms a valuable functionality.

Health-Study 2023 | UK

Digital health services

Importance of functions of a health app (1/2)

Age: Extremely valuable + Quite valuable	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
Storage and provision of documents such as findings, doctor's letters, vaccination record, maternity record, dental bonus booklet, children's examination booklet, etc.	82%	74%	64%	63%	58%
Record physiological parameters (heart rate, blood sugar, weight, etc.)	71%	71%	63%	67%	57%
Self-monitoring of disease-related symptoms (blood pressure, weight, fatigue, etc.)	70%	69%	69%	62%	53%
Forwarding of health data to the attending physician (patient diaries, pedometers, etc.)	74%	68%	64%	64%	51%
Availability of emergency records	76%	64%	64%	60%	52%
Prompt to take medication	71%	73%	64%	58%	46%
Progress monitoring of chronic diseases (Parkinson's disease, diabetes, asthma, etc.)	64%	71%	65%	60%	52%
Background information about diseases and medications	69%	63%	61%	53%	49%

Self-monitoring of disease-related symptoms is the most important functionality for 40 to 49 year old respondents.

Q12: If there was only one app to manage your personal health, what features would you find most valuable?

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Importance of functions of a health app (2/2)

Age: Extremely valuable + Quite valuable	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
Track physical activity (sports, exercise, etc.)	69%	72%	62%	53%	41%
Conducting online consultations between patient and doctor	65%	64%	65%	57%	48%
Self-recognition of diseases and symptoms of diseases (skin cancer, shortness of breath, nausea, etc.)	68%	68%	65%	53%	46%
Physician search and evaluation	62%	60%	60%	53%	40%
Submitting sick notes and invoices to the health insurance company	67%	66%	59%	48%	39%
Record consumption of food and stimulants (calories/food, alcohol, water, etc.)	64%	61%	60%	53%	39%
Record your own mood or personal state of mind	59%	59%	51%	45%	36%

Submitting sick notes and invoices to the health insurance company is valuable to respondents under the age of 40.

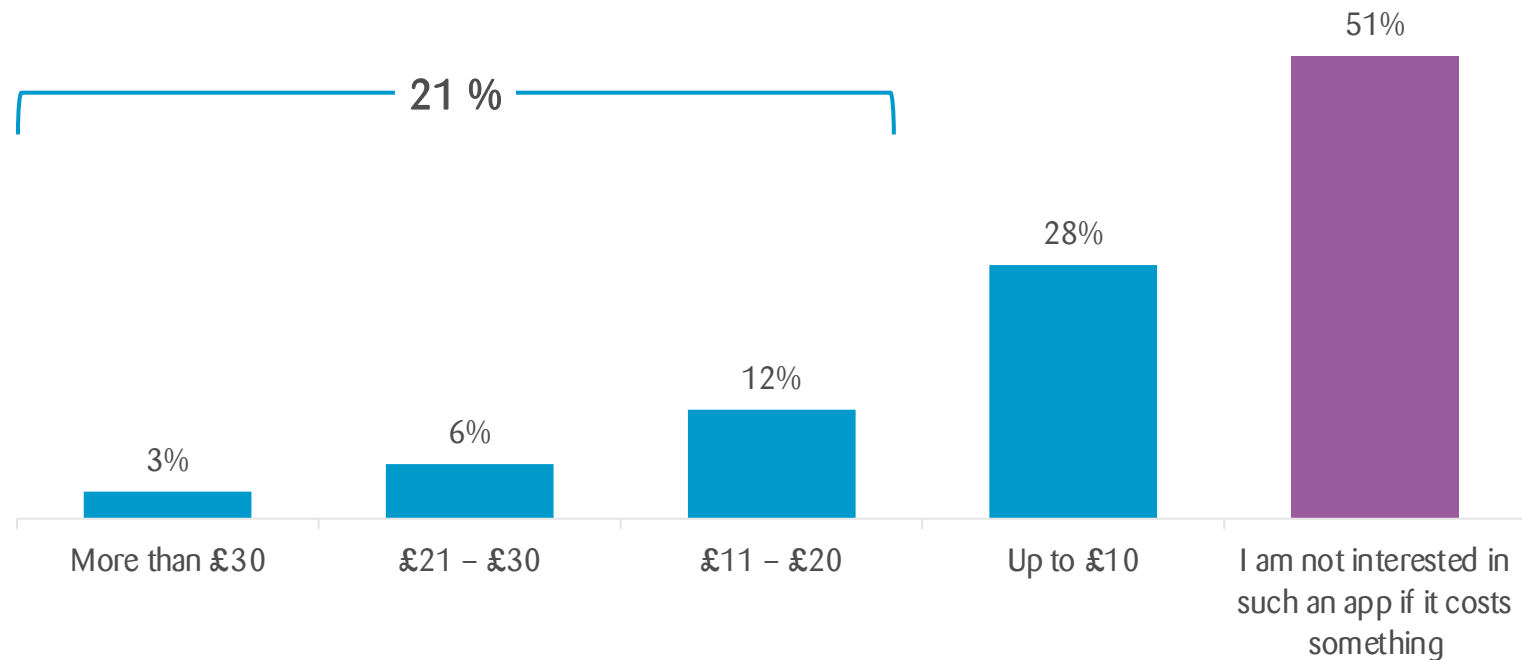
Q12: If there was only one app to manage your personal health, what features would you find most valuable?

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Willingness to pay for a health app



Q13: How much would you pay monthly for such an app?

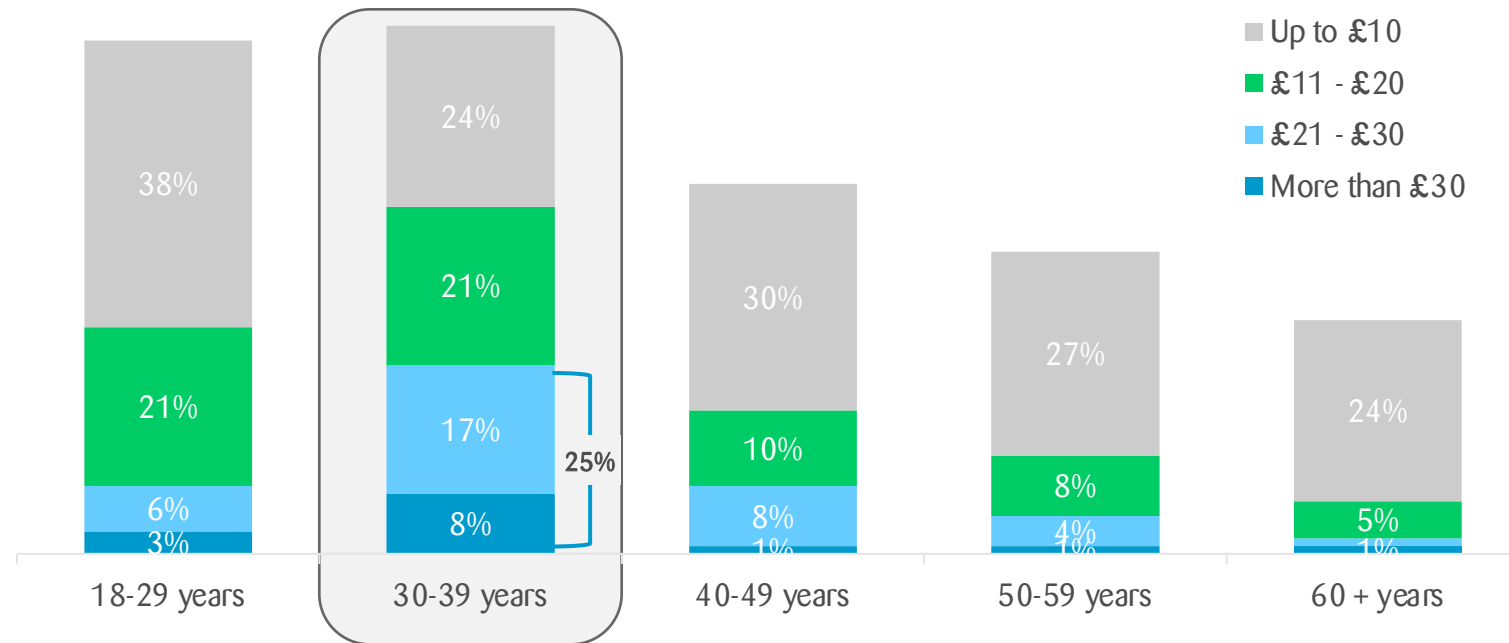
Base: All respondents n=1,000

Only one out of five would pay more than £10 per month for using a health app.

Health-Study 2023 | UK

Digital health services

Willingness to pay for a health app



Respondents between 30 and 39 years are most willing to pay for a health app. One out of four would pay more than £20 per month.

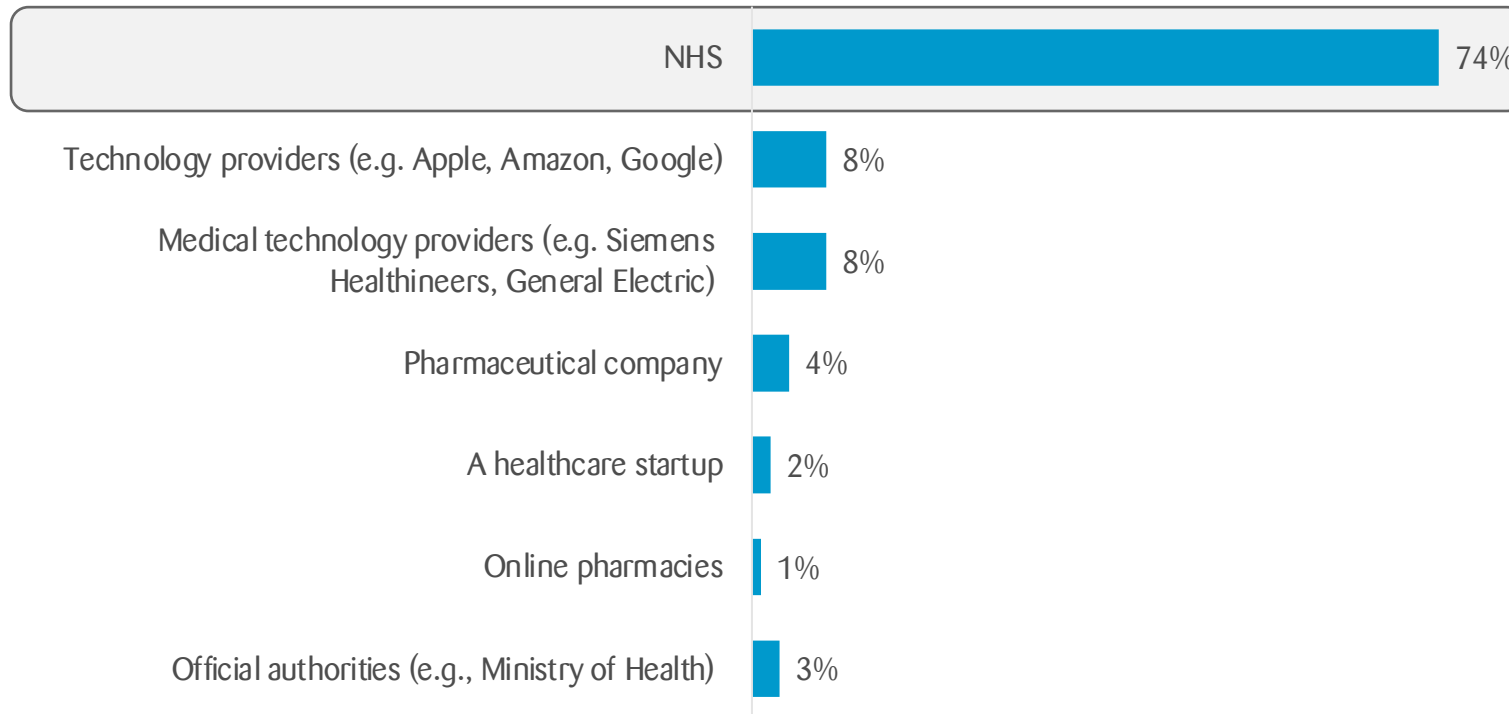
Q13: How much would you pay monthly for such an app?

Base: All respondents n=1,000; answer category 'I am not interested in such an app if it costs something' not shown

Health-Study 2023 | UK

Digital health services

Preferred providers for a health app



Q14: If there were multiple providers for such an app or platform, who would you most trust to provide you with such an app (given the same feature set and regardless of whether it costs anything or not)?

Base: All respondents n=1,000

The NHS would be the preferred health app provider for three quarters of all respondents.

Health-Study 2023 | UK

Digital health services

Preferred providers for a health app

Age	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
NHS	64%	62%	69%	81%	86%
Technology providers (e.g. Apple, Amazon, Google)	13%	8%	9%	5%	5%
Medical technology providers (e.g. Siemens Healthineers, General Electric)	9%	16%	8%	6%	4%
Pharmaceutical company	6%	6%	5%	1%	1%
A healthcare startup	4%	3%	5%	1%	1%
Online pharmacies	2%	2%	1%	1%	1%
Official authorities (e.g., Ministry of Health)	2%	3%	3%	5%	2%

Especially respondents between 30 and 39 years would trust an app supplied by a medical technology provider.

Q14: If there were multiple providers for such an app or platform, who would you most trust to provide you with such an app (given the same feature set and regardless of whether it costs anything or not)?

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Preferred providers for a health app

Yearly household income*	Under £20,000	£20,000 - £29,999	£30,000 - £49,999	£50,000 - £69,999	Above £70,000
Base:	243	212	285	118	96
NHS	77%	72%	79%	70%	59%
Technology providers (e.g. Apple, Amazon, Google)	7%	10%	7%	7%	7%
Medical technology providers (e.g. Siemens Healthineers, General Electric)	6%	7%	7%	14%	15%
Pharmaceutical company	2%	6%	3%	3%	5%
A healthcare startup	3%	1%	2%	3%	6%
Online pharmacies	1%	0%	1%	1%	2%
Official authorities (e.g., Ministry of Health)	4%	4%	1%	2%	6%

Respondents with a high income have more trust in an app supplied by a medical technology provider.

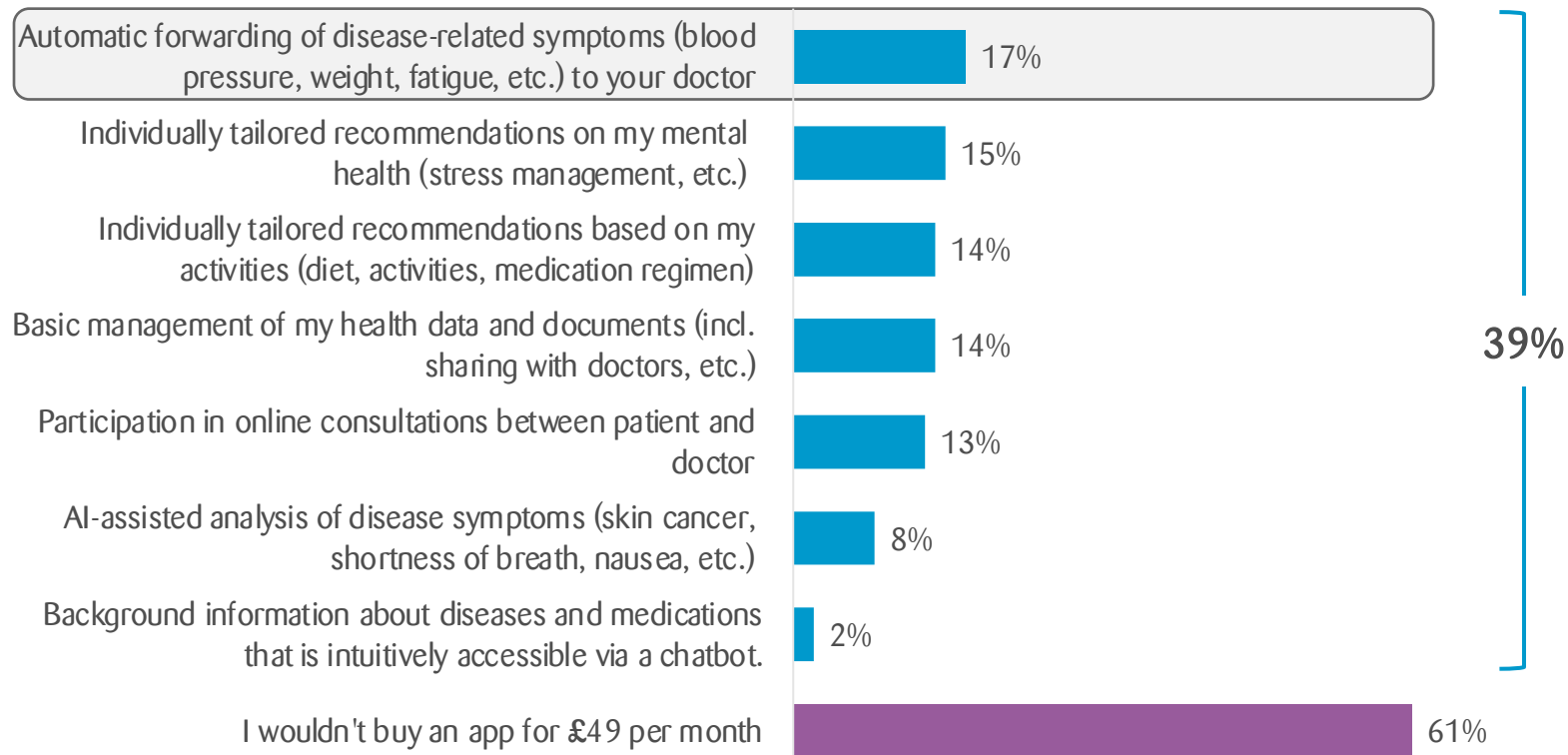
Q14: If there were multiple providers for such an app or platform, who would you most trust to provide you with such an app (given the same feature set and regardless of whether it costs anything or not)?

Base: All respondents n=1,000; *not shown: no response

Health-Study 2023 | UK

Digital health services

Required functions for £49



Around 40 per cent would eventually pay £49 per month for a health app. Automatic forwarding of disease-related symptoms is considered the most important functionality.

Q15: What would a health app have to offer for you to pay £49 a month for it? Please select the three functions that are most important to you.

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Required functions for £49

Age	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
Automatic forwarding of disease-related symptoms (blood pressure, weight, fatigue, etc.) to your doctor	22%	29%	18%	14%	8%
Individually tailored recommendations on my mental health (stress management, etc.)	31%	32%	10%	8%	3%
Individually tailored recommendations based on my activities (diet, activities, medication regimen)	18%	23%	13%	12%	9%
Basic management of my health data and documents (incl. sharing with doctors, etc.)	23%	24%	12%	8%	8%
Participation in online consultations between patient and doctor	17%	24%	7%	11%	7%
AI-assisted analysis of disease symptoms (skin cancer, shortness of breath, nausea, etc.)	10%	13%	7%	6%	5%
Background information about diseases and medications that is intuitively accessible via a chatbot.	4%	2%	1%	1%	1%
I wouldn't buy an app for £49 per month	39%	33%	64%	71%	83%

Individually tailored recommendations are most important for respondents under 40. Older people are less willing to pay £49 per month for a health app.

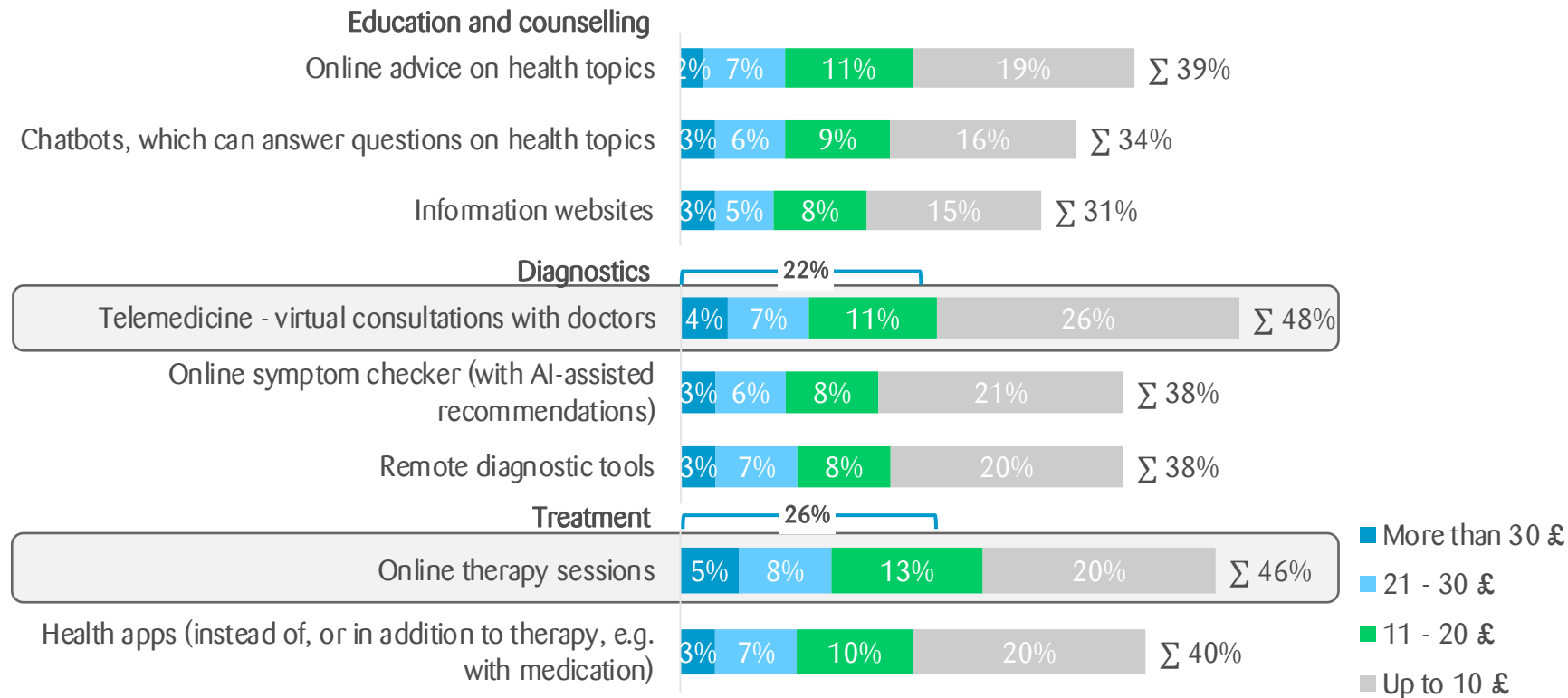
Q15: What would a health app have to offer for you to pay £49 a month for it? Please select the three functions that are most important to you.

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Willingness to pay for digital health services (1/2)



Around one half would pay for virtual consultations or online therapy sessions. One quarter would not pay more than £10 per month.

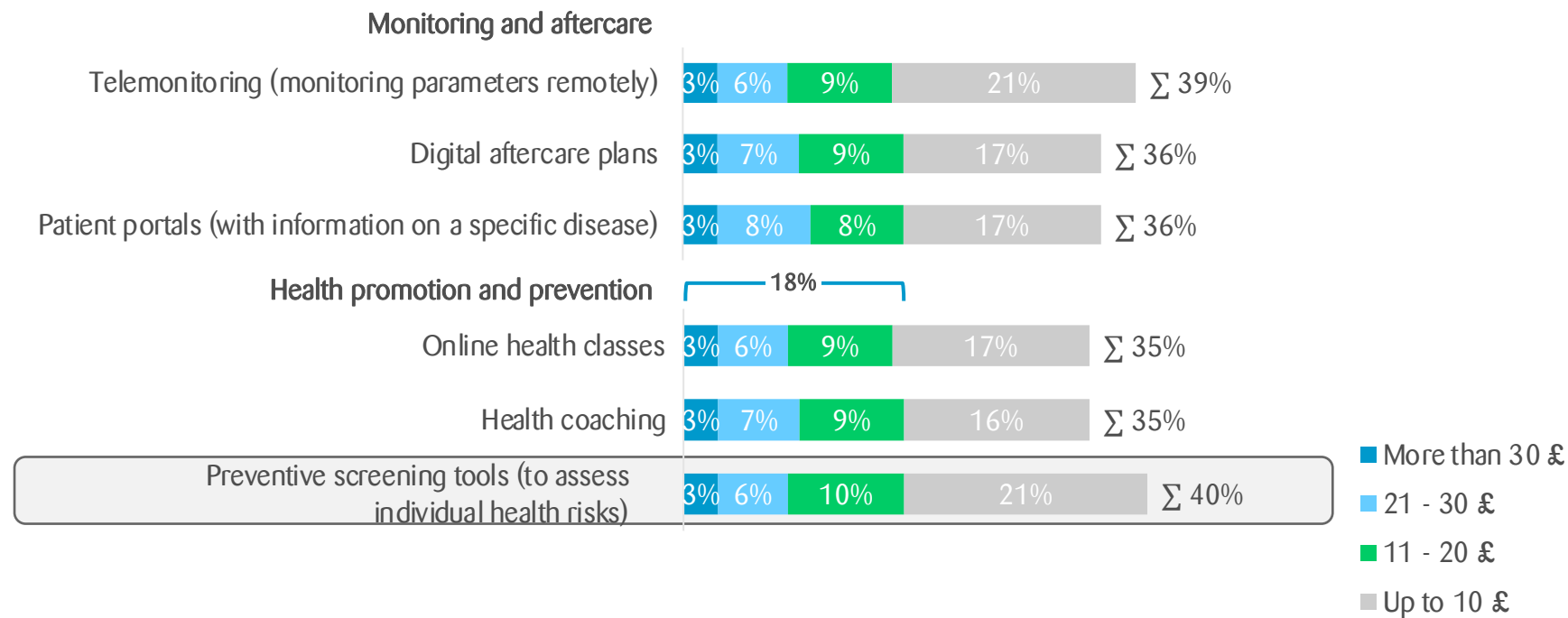
Q16: How much money would you pay each month for the following digital health services?

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Willingness to pay for digital health services (2/2)



Four out of ten would pay at least £10 per month for preventive screening tools.

Q16: How much money would you pay each month for the following digital health services?

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Willingness to pay for digital health services (1/2)

Age: More than £10	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
Education and counselling					
Online advice on health topics	33%	44%	17%	10%	4%
Chatbots, which can answer questions on health topics	29%	39%	15%	10%	4%
Information websites	26%	34%	14%	9%	4%
Diagnostics					
Telemedicine - virtual consultations with doctors	35%	43%	17%	14%	7%
Online symptom checker (with AI-assisted recommendations)	27%	36%	13%	12%	4%
Remote diagnostic tools	31%	38%	15%	12%	5%
Treatment					
Online therapy sessions	42%	48%	23%	15%	10%
Health apps (instead of, or in addition to therapy, e.g. with medication)	32%	45%	15%	14%	6%

Q16: How much money would you pay each month for the following digital health services?

Base: All respondents n=1,000

Respondents under the age of 40 are more willing to pay more than £10 for virtual consultations and online therapy sessions.

Health-Study 2023 | UK

Digital health services

Willingness to pay for digital health services (2/2)

Age: More than £10	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
Monitoring and aftercare					
Telemonitoring (monitoring parameters remotely)	29%	41%	14%	11%	4%
Digital aftercare plans	32%	44%	17%	12%	5%
Patient portals (with information on a specific disease)	30%	42%	15%	11%	4%
Health promotion and prevention					
Online health classes	32%	38%	16%	11%	4%
Health coaching	34%	38%	19%	12%	4%
Preventive screening tools (to assess individual health risks)	33%	40%	16%	12%	5%

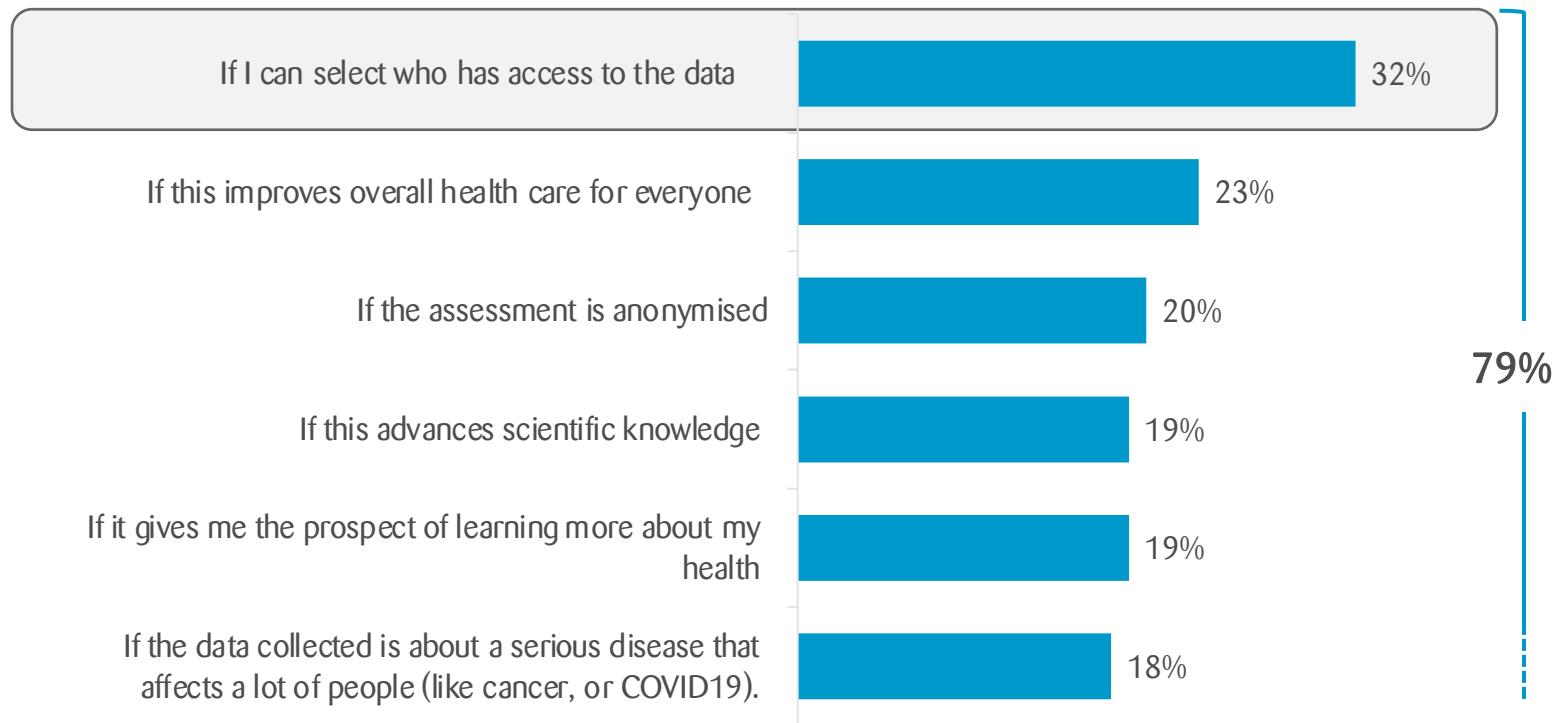
Especially respondents between 30 and 39 would pay more than £10 for monitoring and aftercare applications.

Q16: How much money would you pay each month for the following digital health services?
Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Conditions to provide personal health information (1/2)



Controlling data access is the most important prerequisite when it comes to providing personal health information.

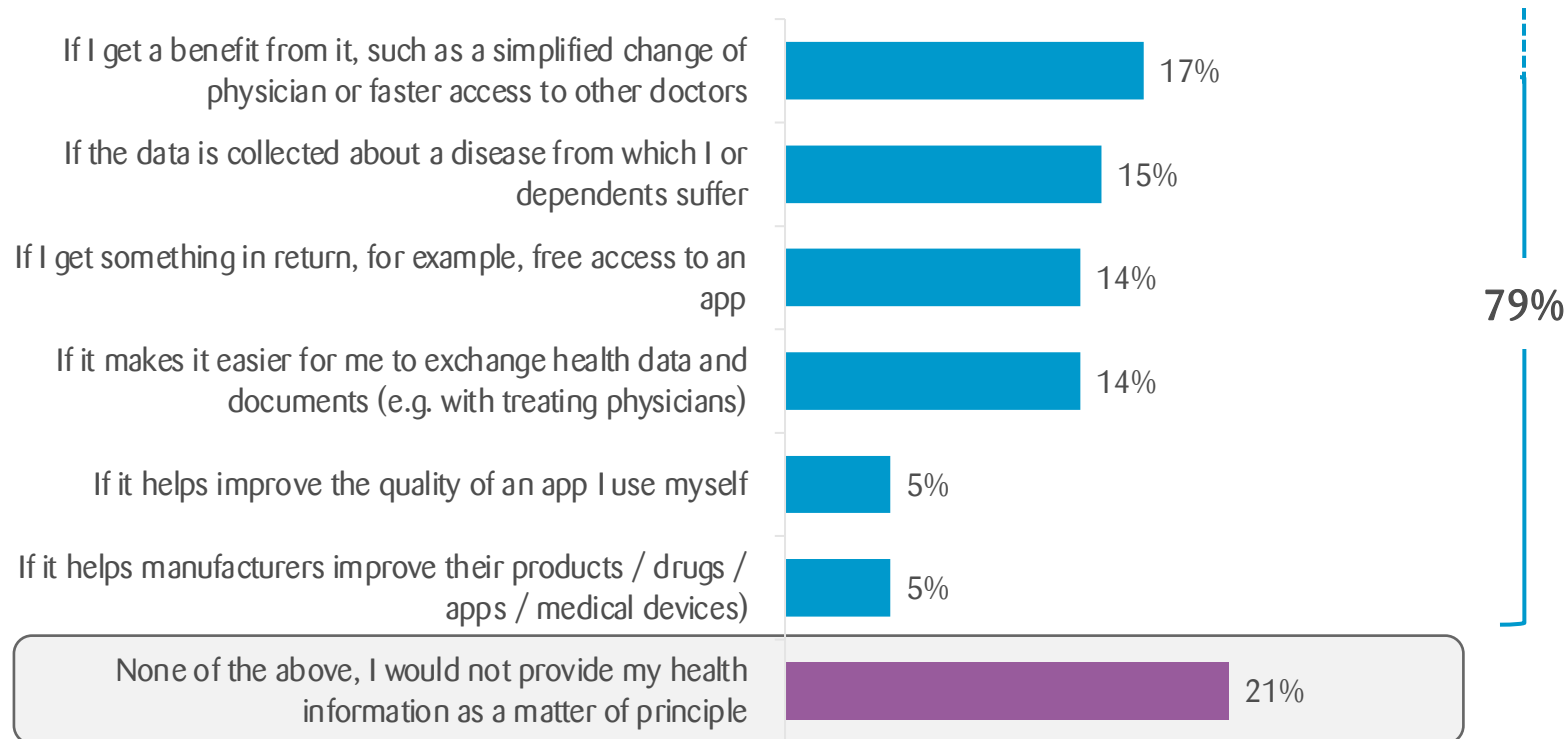
Q17: Under which of the following conditions would you feel comfortable providing personal health information? Please select the three most important points for you.

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Conditions to provide personal health information (2/2)



Four out of five would share their personal health data under certain conditions.

Q17: Under which of the following conditions would you feel comfortable providing personal health information? Please select the three most important points for you.

Base: All respondents n=1,000

Health-Study 2023 | UK

Digital health services

Conditions to provide personal health information (1/2)

Yearly household income*	Under £20,000	£20,000 - £29,999	£30,000 - £49,999	£50,000 - £69,999	Above £70,000
Base:	243	212	285	118	96
If I can select who has access to the data	30%	32%	35%	26%	31%
If this improves overall health care for everyone	23%	23%	21%	21%	36%
If the assessment is anonymised	22%	21%	17%	23%	16%
If this advances scientific knowledge	16%	19%	19%	24%	24%
If it gives me the prospect of learning more about my health	17%	19%	21%	15%	24%
If the data collected is about a serious disease that affects a lot of people (like cancer, or COVID19).	15%	18%	17%	23%	23%

Respondents with a high income would share their data if it improved overall health care.

Q17: Under which of the following conditions would you feel comfortable providing personal health information? Please select the three most important points for you.

Base: All respondents n=1,000; *not shown: no response

Health-Study 2023 | UK

Digital health services

Conditions to provide personal health information (2/2)

Yearly household income*	Under £20,000	£20,000 - £29,999	£30,000 - £49,999	£50,000 - £69,999	Above £70,000
Base:	243	212	285	118	96
If I get a benefit from it, such as a simplified change of physician or faster access to other doctors	15%	15%	23%	17%	18%
If the data is collected about a disease from which I or dependents suffer	13%	10%	16%	25%	19%
If I get something in return, for example, free access to an app	9%	15%	12%	13%	31%
If it makes it easier for me to exchange health data and documents (e.g. with treating physicians)	11%	11%	18%	17%	21%
If it helps improve the quality of an app I use myself	3%	6%	6%	4%	4%
If it helps manufacturers improve their products / drugs / apps / medical devices)	4%	4%	5%	8%	4%
None of the above, I would not provide my health information as a matter of principle	32%	21%	17%	14%	8%

Q17: Under which of the following conditions would you feel comfortable providing personal health information? Please select the three most important points for you.

Base: All respondents n=1,000; *not shown: no response

The higher the income the higher the willingness to share personal health information.

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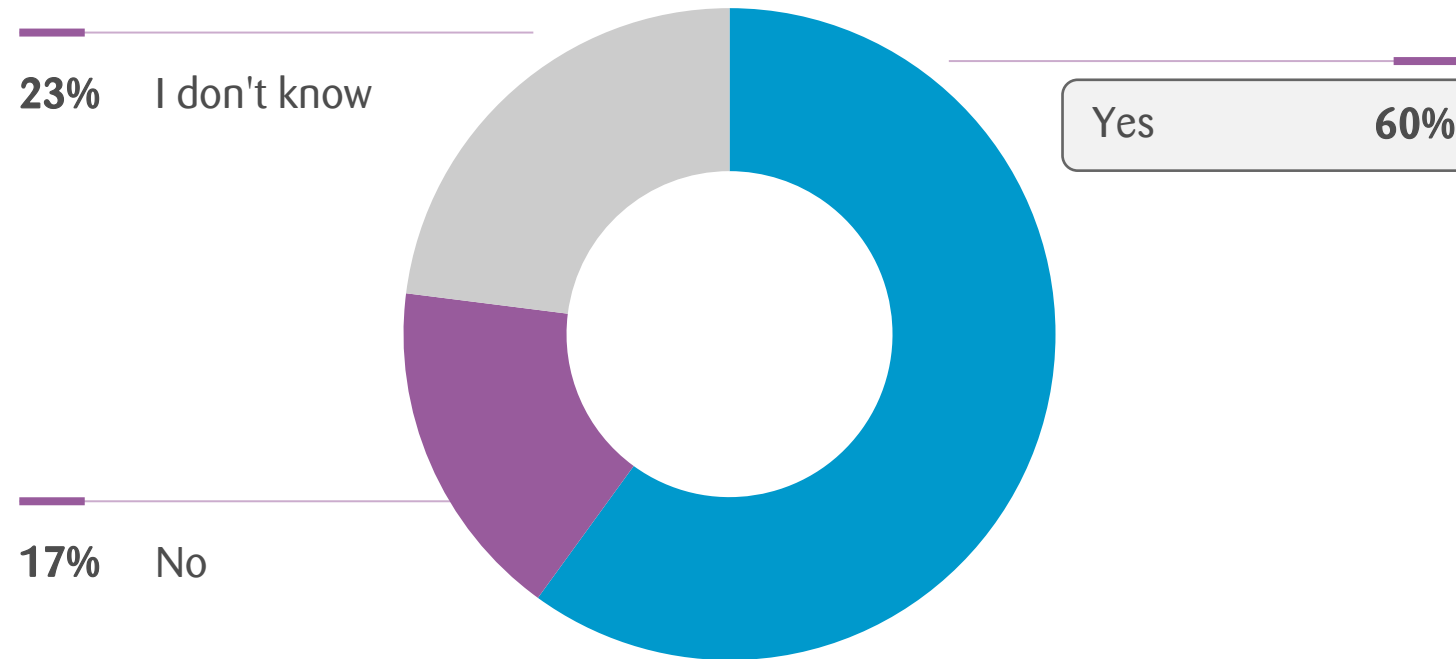
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Health-Study 2023 | UK

Apps on prescription

Interested in apps on prescription



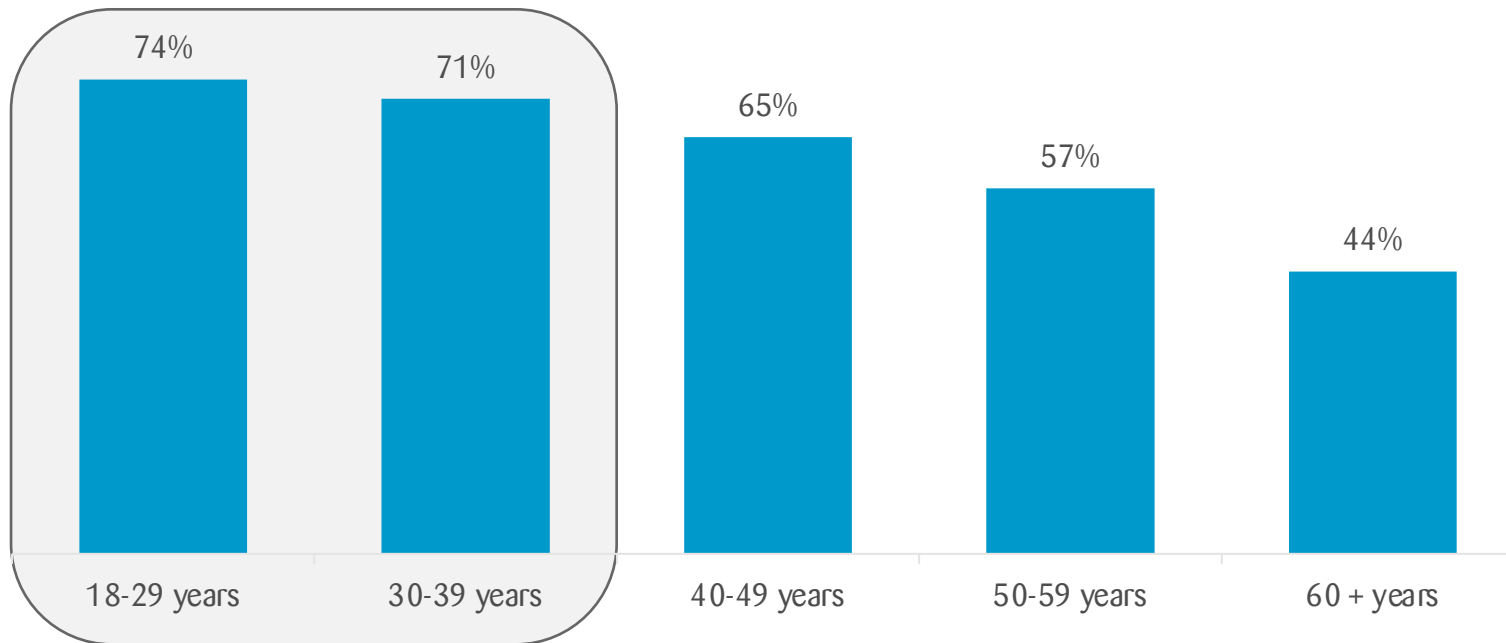
60 per cent of the respondents are interested in apps on prescription, paid for by NHS.

Q18: Would you be interested in apps on prescription, paid for by the NHS?
Base: All respondents n=1,000

Health-Study 2023 | UK

Apps on prescription

Interested in apps on prescription: Yes



Q18: Would you be interested in apps on prescription, paid for by the NHS?

Base: All respondents n=1,000

Especially younger respondents are interested in apps on prescription.

Health-Study 2023 | UK

Apps on prescription

Interested in apps on prescription: Yes



Q18: Would you be interested in apps on prescription, paid for by the NHS?

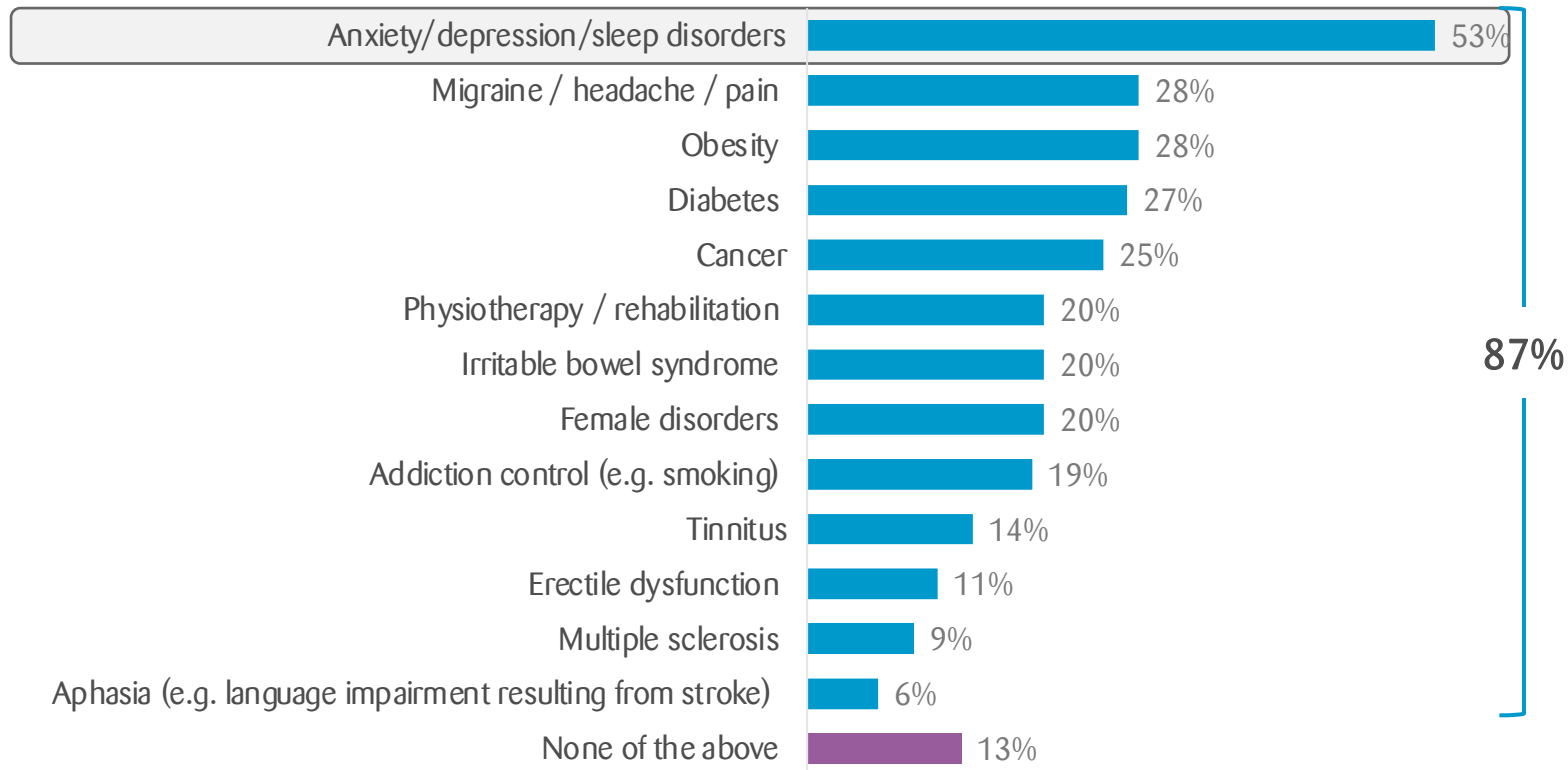
Base: All respondents n=1,000 ; not shown: no response

The higher the income the higher the share of respondents interested in apps on prescription.

Health-Study 2023 | UK

Apps on prescription

Use of an app on prescription



More than 50 per cent of the respondents interested in apps on prescription would use them to treat anxiety, depression or sleep disorders.

Q19: For which of the following health problems would you like to use apps on prescription paid for by the NHS?

Basis: Respondents interested in apps on prescription, n=598

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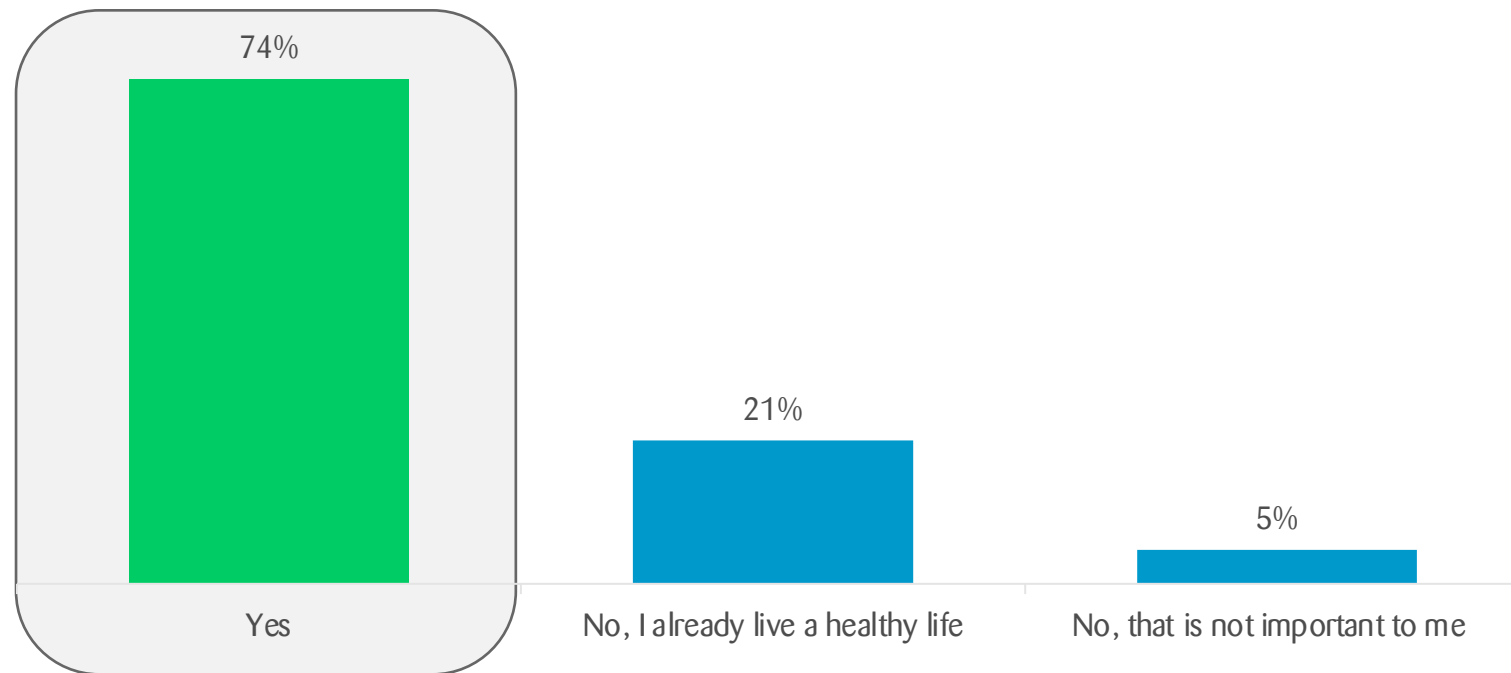
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Health-Study 2023 | UK

General attitude towards health issues

Desire to live healthier



Q20: Would you like to live healthier?

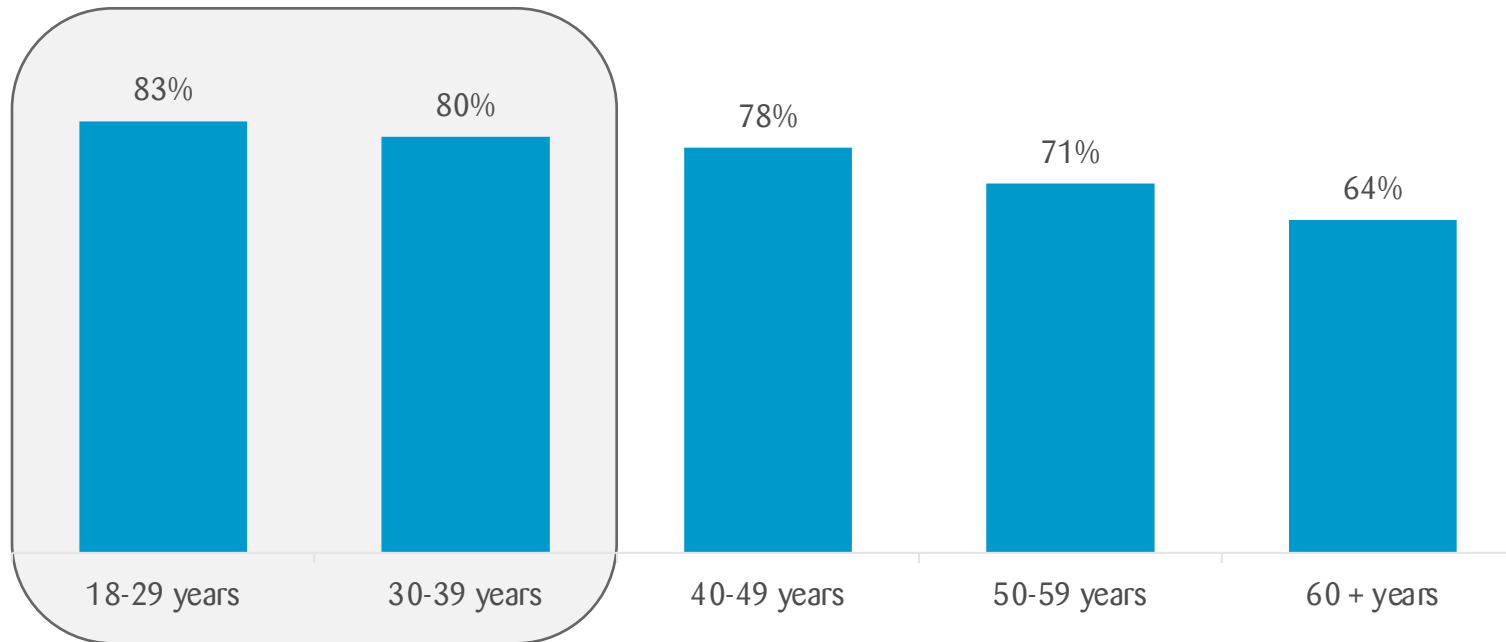
Base: All respondents n=1,000

Three out of four would like to live healthier.

Health-Study 2023 | UK

General attitude towards health issues

Desire to live healthier: Yes



Q20: Would you like to live healthier?

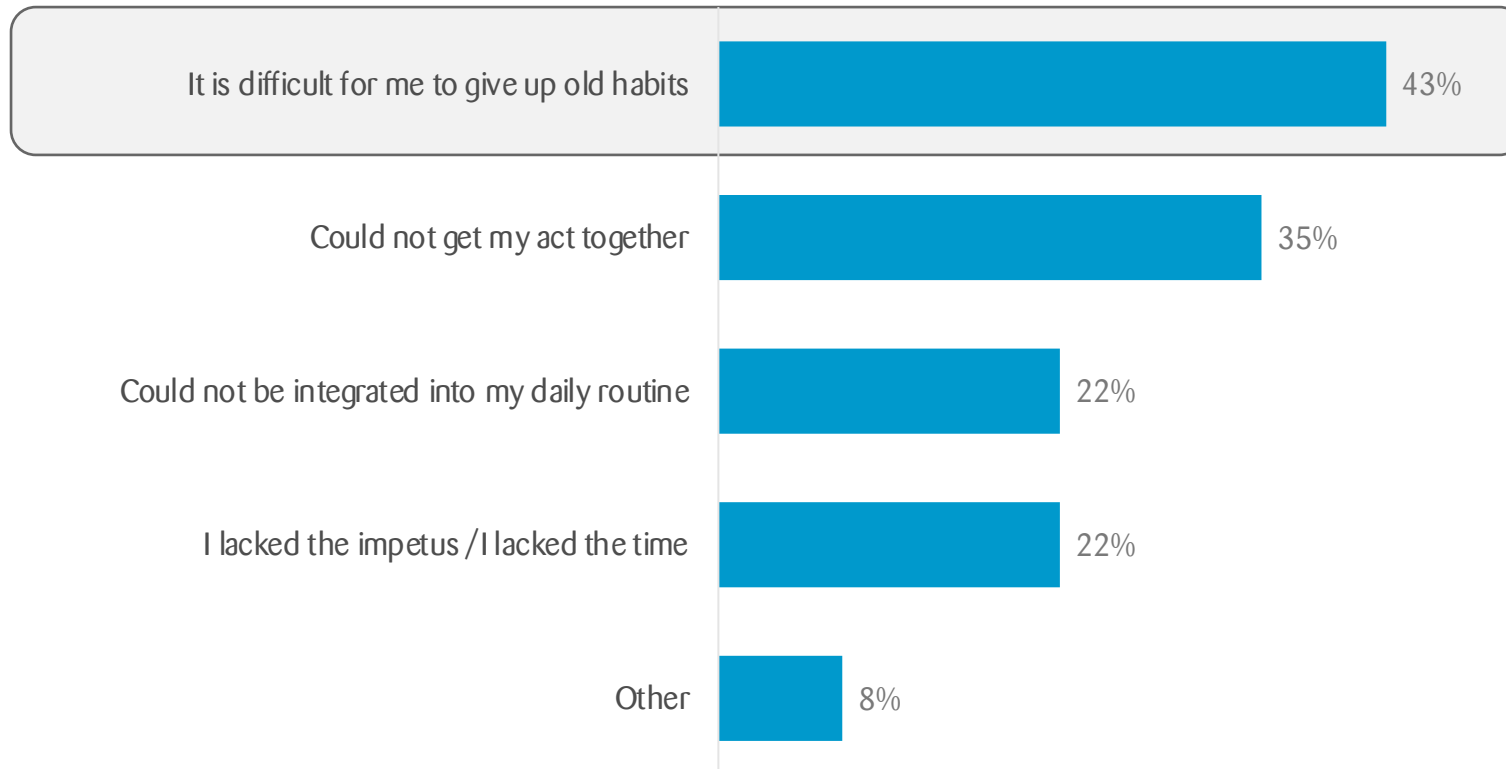
Base: All respondents n=1,000

Especially younger respondents have a desire to live healthier.

Health-Study 2023 | UK

General attitude towards health issues

Barriers to healthier living



Q21: What has prevented you from doing this so far?
Basis: Respondents who would like to live healthier, n=737

Difficulties to give up old habits has been the greatest obstacle for those who would like to live healthier.

Health-Study 2023 | UK

General attitude towards health issues

Barriers to healthier living

Age	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	157	138	120	122	200
It is difficult for me to give up old habits	35%	46%	40%	47%	48%
Could not get my act together	41%	38%	36%	34%	28%
Could not be integrated into my daily routine	36%	29%	19%	16%	12%
I lacked the impetus/I lacked the time	21%	18%	18%	26%	25%
Other	4%	3%	12%	9%	10%

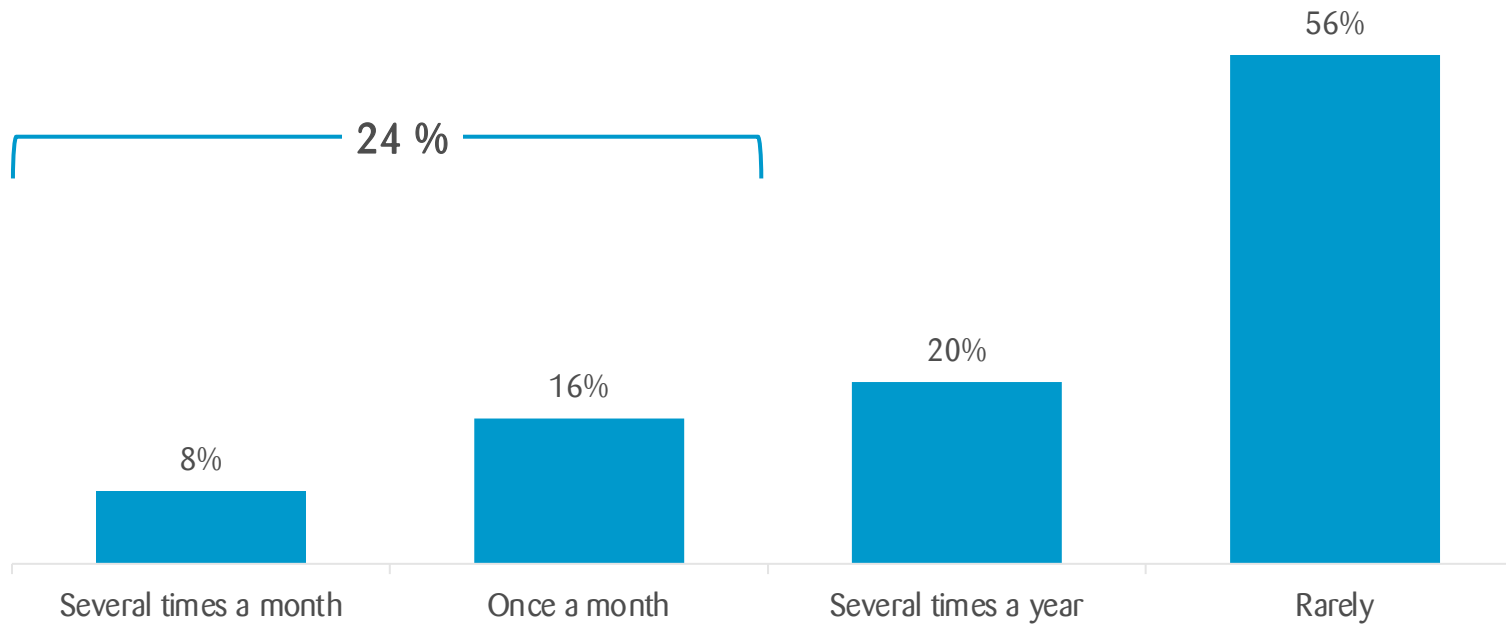
Especially older respondents have had difficulties to give up old habits.

Q21: What has prevented you from doing this so far?
Basis: Respondents who would like to live healthier, n=737

Health-Study 2023 | UK

General attitude towards health issues

Frequency of doctor visits



A quarter of all respondents sees a doctor at least once a month.

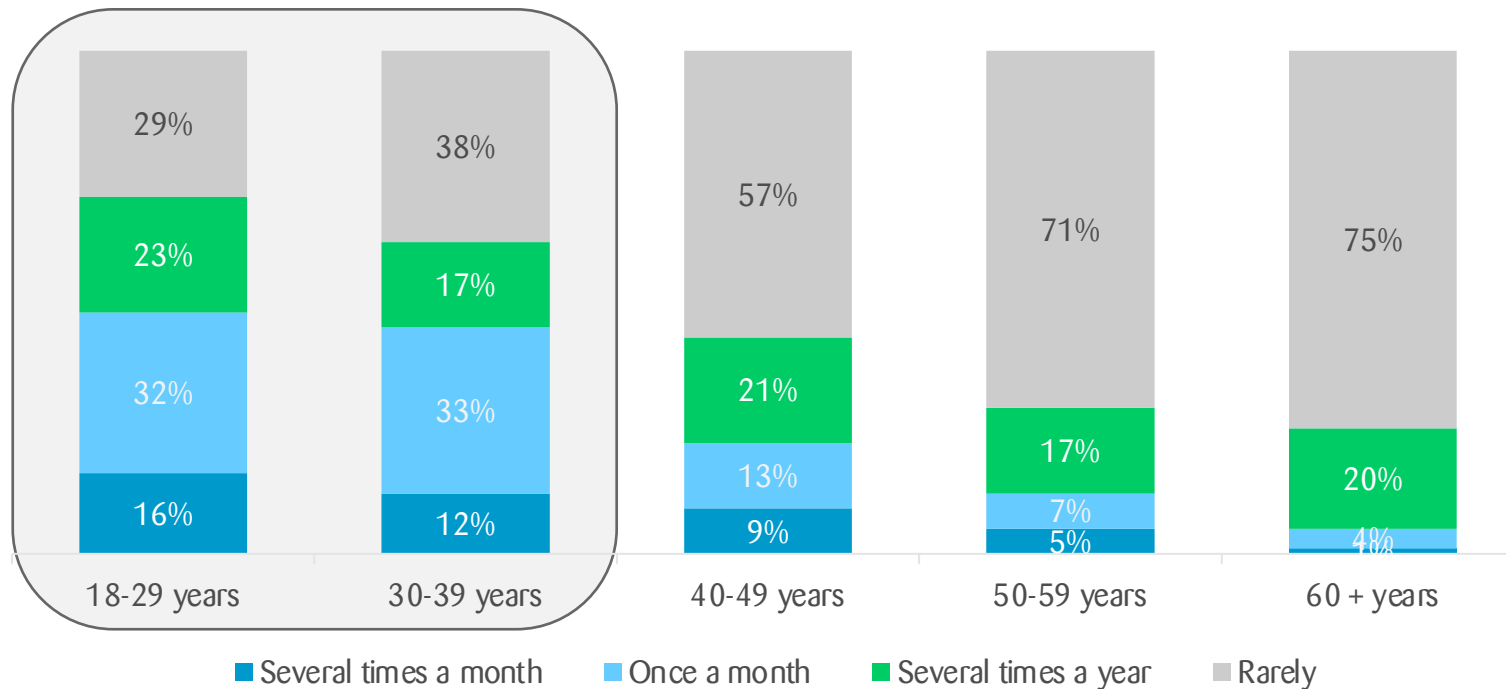
Q22: How often did you visit a doctor in the last twelve months on average?

Base: All respondents n=1,000

Health-Study 2023 | UK

General attitude towards health issues

Frequency of doctor visits



Q22: How often did you visit a doctor in the last twelve months on average?

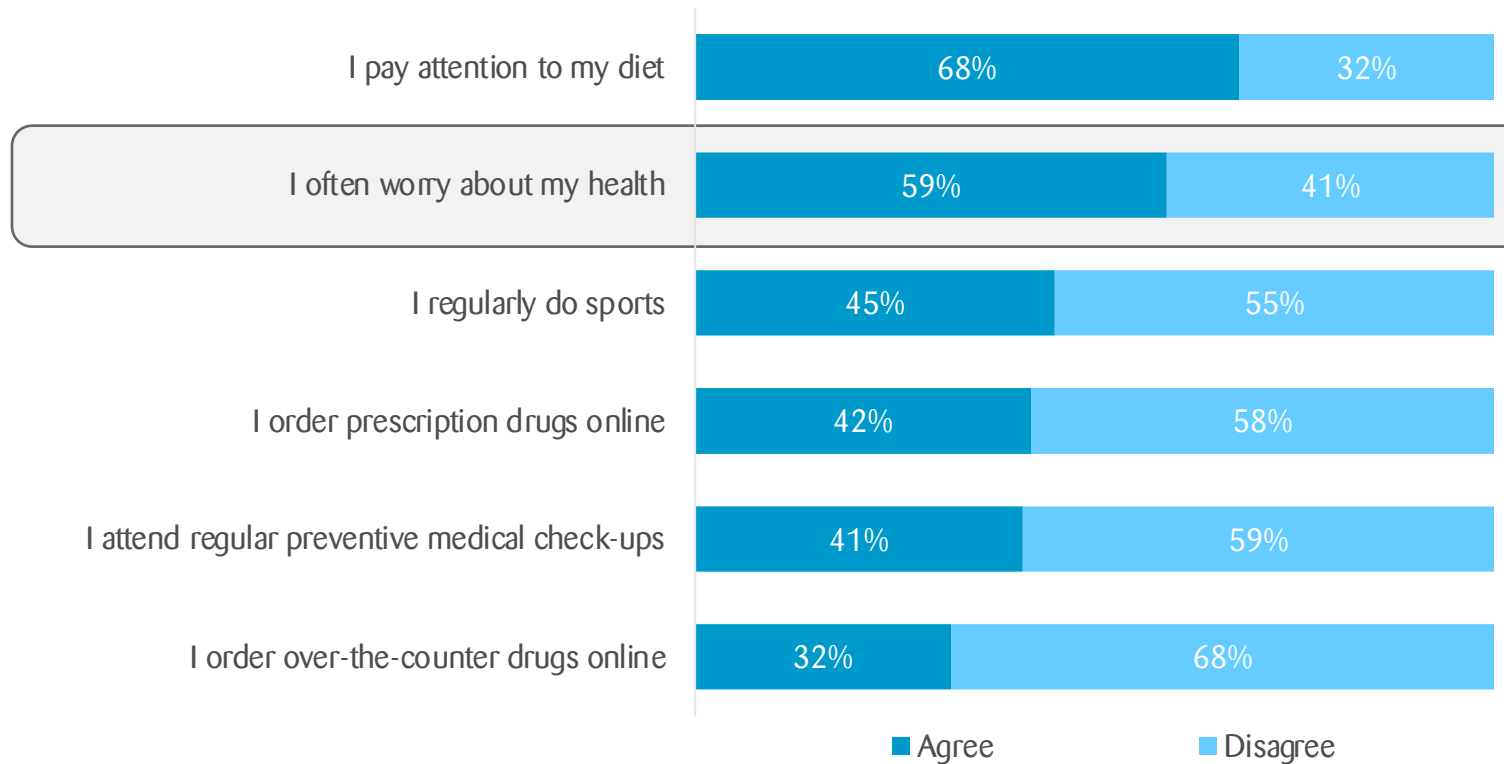
Base: All respondents n=1,000

Respondents under the age of 40 see a doctor more frequently than older people.

Health-Study 2023 | UK

General attitude towards health issues

Attitudes towards health issues



Q23: Which of the following statements do you agree with?

Base: All respondents n=1,000

Almost 60 per cent of all respondents worry about their health.

Health-Study 2023 | UK

General attitude towards health issues

Attitudes towards health issues

Age: Agree	18-29 years	30-39 years	40-49 years	50-59 years	60 + years
Base:	190	173	153	171	313
I pay attention to my diet	70%	64%	69%	66%	71%
I often worry about my health	74%	71%	61%	53%	47%
I regularly do sports	53%	60%	52%	43%	28%
I order prescription drugs online	46%	45%	43%	36%	39%
I attend regular preventive medical check-ups	41%	51%	35%	38%	40%
I order over-the-counter drugs online	44%	52%	34%	25%	16%

Especially younger respondents worry about their health.

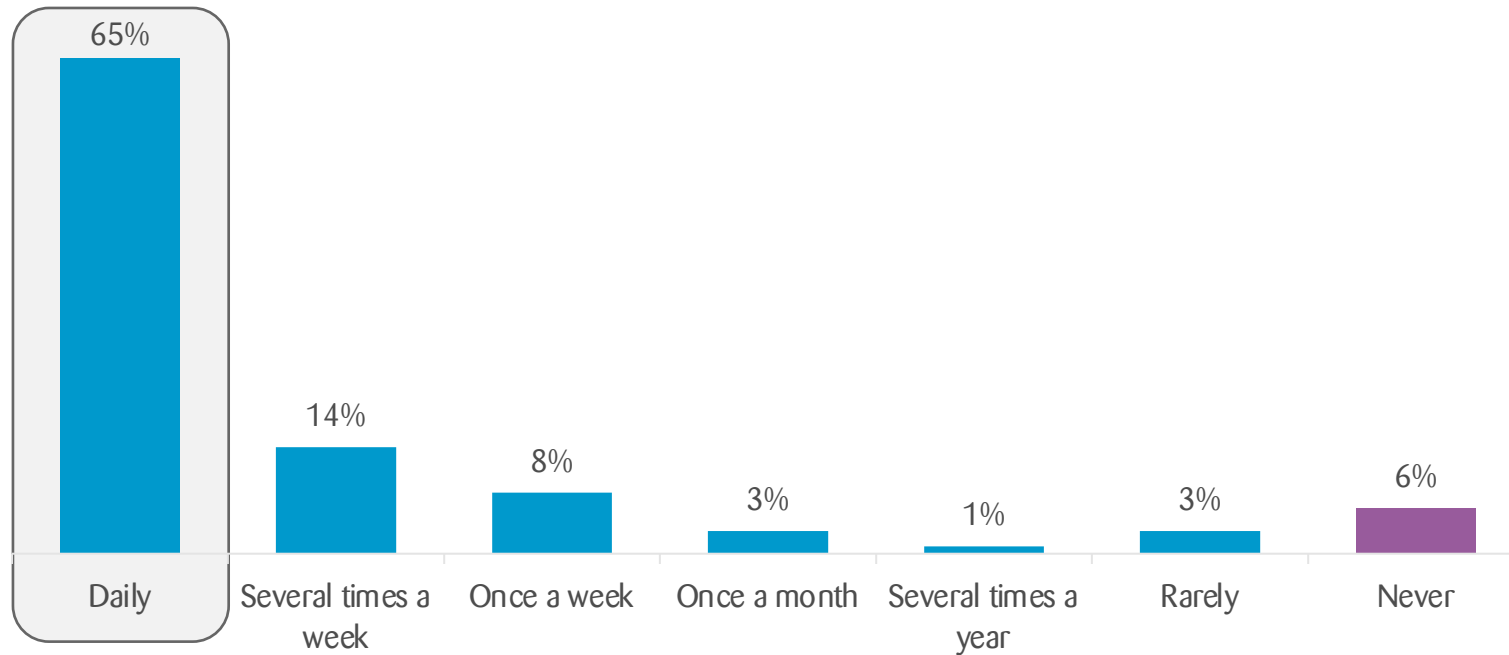
Q23: Which of the following statements do you agree with?

Base: All respondents n=1,000

Health-Study 2023 | UK

General attitude towards health issues

Use of social media



Q24: How often do you use social media, such as Facebook, Instagram, YouTube or similar?

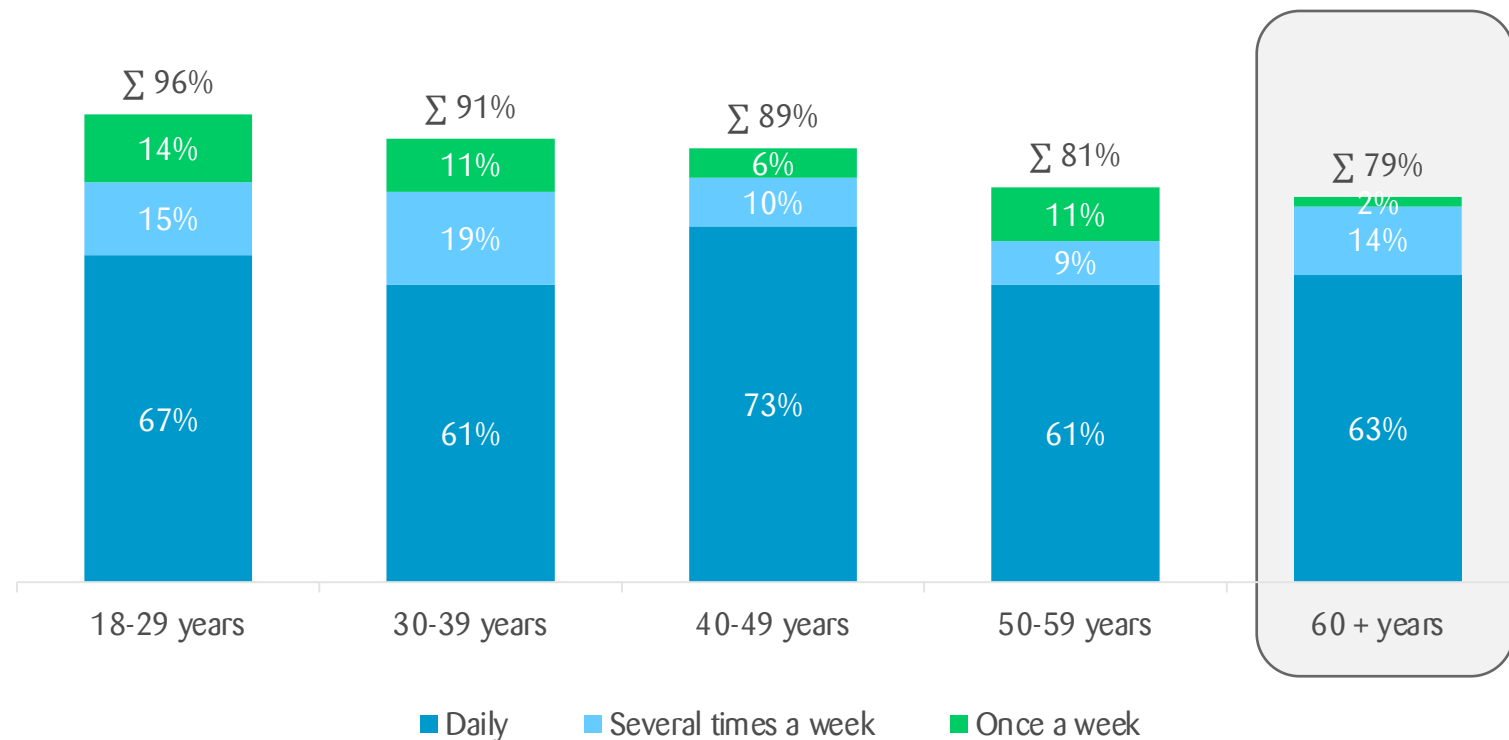
Base: All respondents n=1,000

Roughly two thirds use social media on a daily basis.

Health-Study 2023 | UK

General attitude towards health issues

Use of social media: At least once a week



Almost all respondents under the age of 30 use social media at least once a week. Four out of five respondents aged 60 years and above use social media at least weekly.

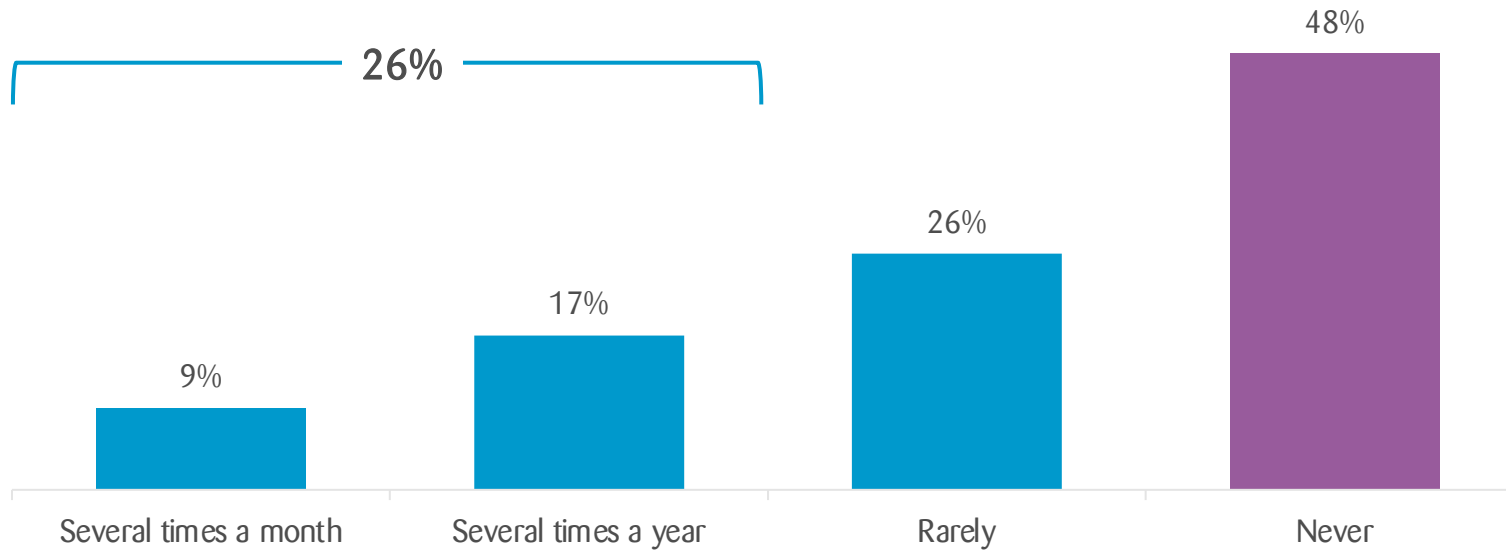
Q24: How often do you use social media, such as Facebook, Instagram, YouTube or similar?

Base: All respondents n=1,000

Health-Study 2023 | UK

General attitude towards health issues

Frequency of online training courses



One quarter take part in online training courses several times a year.

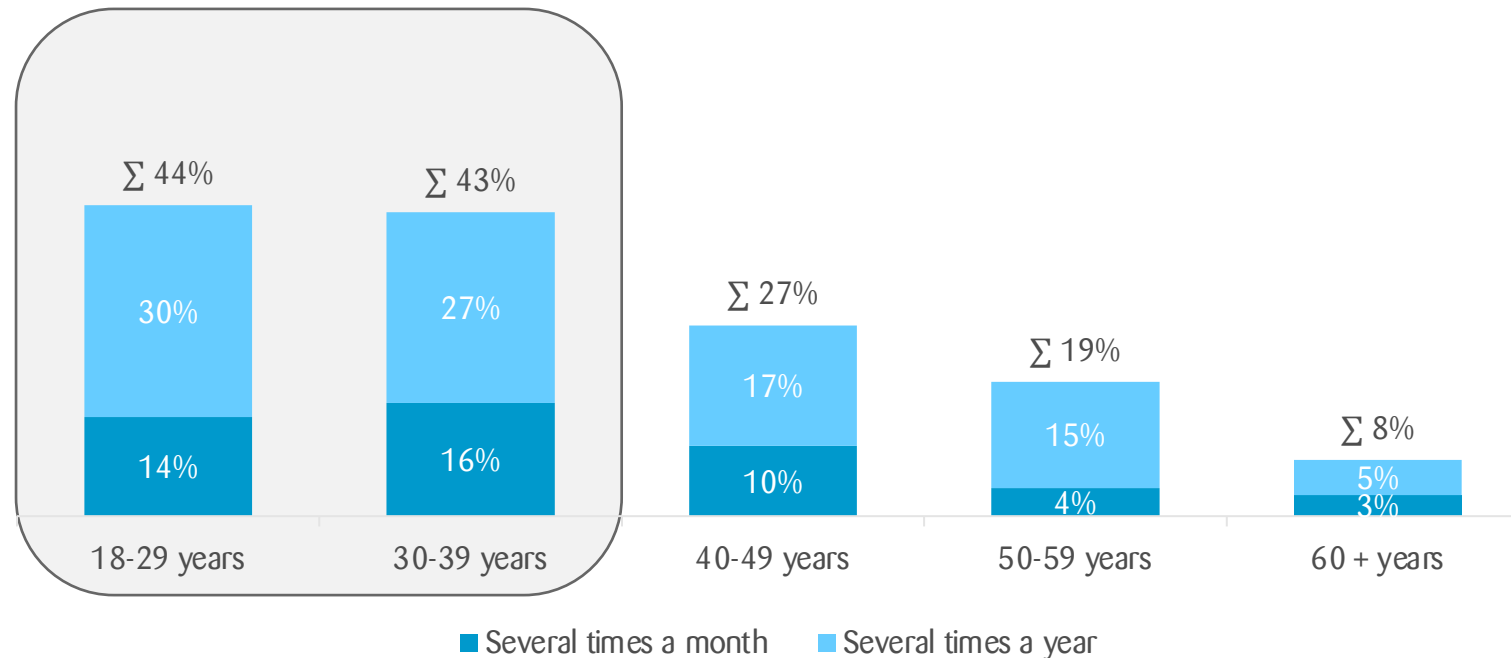
Q25: How often are you taking online training courses?

Base: All respondents n=1,000

Health-Study 2023 | UK

General attitude towards health issues

Frequency of online training courses



Q25: How often are you taking online training courses?

Base: All respondents n=1,000

Respondents under the age of 40 use online training courses most frequently.

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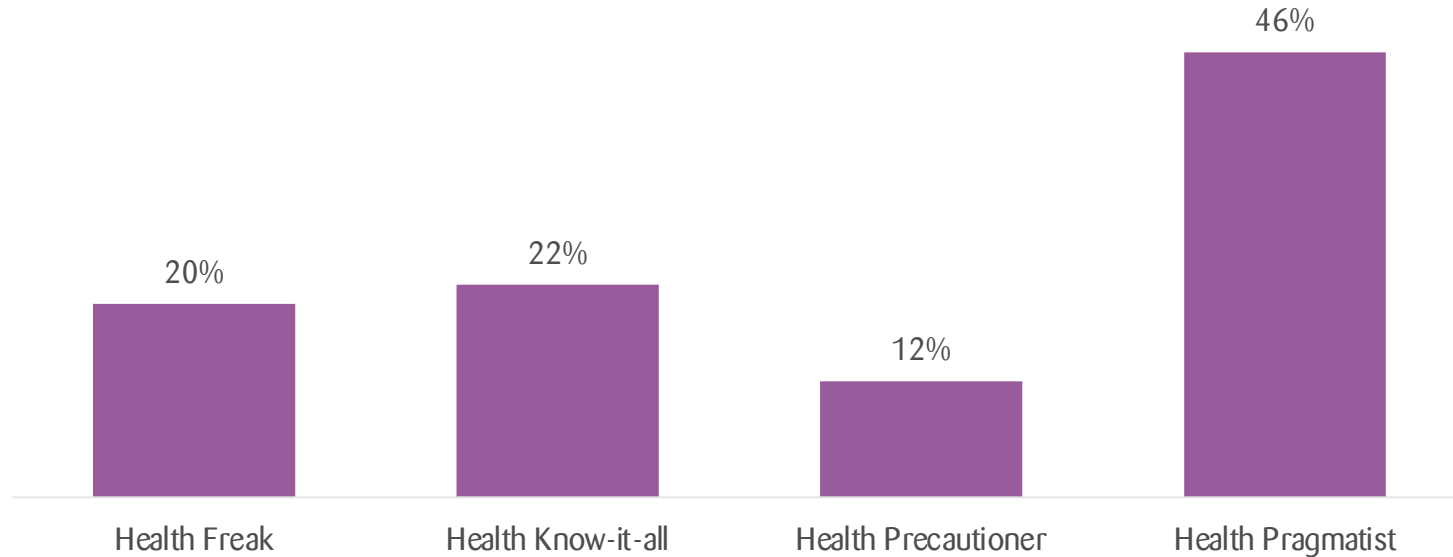
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Health-Study 2023 | UK

Healthcare typologies

Typologies: Share of the general population



Base: All respondents n=1,000

Based on a cluster analysis, four homogeneous groups can be identified according to their general attitudes towards health topics, which are as homogeneous as possible regarding various psychographic characteristics.

Health-Study 2023 | UK

Healthcare typologies

Health Freak – General attitude

Frequency of doctor visits

Several times a month	30%
Once a month	51%
Several times a year	15%
Rarely	4%

Desire to live healthier

Yes	83%
No, I already live a healthy life	14%
No, that is not important to me	3%

Average age: 35 years

Attitudes towards health issues

I often worry about my health	89%
I pay attention to my diet	77%
I regularly do sports	76%
I order over-the-counter drugs online	76%
I order prescription drugs online	75%
I attend regular preventive medical check-ups	68%

The Health Freak is very young at an average of 35 years. Although he pays particular attention to his diet, he often worries about his health and wishes to live healthier lives. In addition, he goes to the doctor more often than average.

Base: Health Freak, n=195

Health-Study 2023 | UK

Healthcare typologies

Health Freak – Use of medical apps

Use of medical apps

Health record app, like the NHS app	37%
Fitness tracker	37%
Mental health app	34%
Medication reminder	28%
Symptom checker	27%
App for medical advice	26%
Other medical app	1%
I haven't used any medical app yet	6%

Features of a health app: Very willing

Treatment reminders (e.g. vaccination reminders, cancer screenings)	32%
Diagnosis (e.g. symptom checkers, self-diagnosis tools)	31%
General wellness (e.g. diet tracking, exercise tracking, stress management)	29%
Treatment of conditions (e.g. medication management, telemedicine)	27%
E Pre-emptive diagnosis (monitoring my health statistics and alerting me if unusual trends develop)	27%

The Health Freak uses medical apps such as the health record app, fitness tracker or a mental health app primarily to ensure that he does not miss any treatment or to check symptoms and carry out self-diagnosis.

Base: Health Freak, n=195

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Healthcare typologies

Health Know-it-all – General attitude

Frequency of doctor visits

Several times a month	8%
Once a month	26%
Several times a year	66%
Rarely	0%

Desire to live healthier

Yes	86%
No, I already live a healthy life	11%
No, that is not important to me	3%

Average age: 44 years

Attitudes towards health issues

I pay attention to my diet	63%
I often worry about my health	78%
I regularly do sports	32%
I order prescription drugs online	47%
I attend regular preventive medical check-ups	52%
I order over-the-counter drugs online	30%

The Health Know-it-all has an average age of 44 years. He rarely sees a doctor, but is very concerned about his health.

Base: Health Know-it-all, n=216

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Healthcare typologies

Health Know-it-all – Use of medical apps

Use of medical apps

Health record app, like the NHS app	44%
Symptom checker	32%
Fitness tracker	23%
Mental health app	16%
App for medical advice	13%
Medication reminder	10%
Other medical app	1%
I haven't used any medical app yet	22%

Features of a health app: Very willing

Treatment reminders (e.g. vaccination reminders, cancer screenings)	34%
General wellness (e.g. diet tracking, exercise tracking, stress management)	31%
Treatment of conditions (e.g. medication management, telemedicine)	17%
E Pre-emptive diagnosis (monitoring my health statistics and alerting me if unusual trends develop)	17%
Diagnosis (e.g. symptom checkers, self-diagnosis tools)	15%

In addition to the health record app, the symptom checker is relatively important to him. He is often concerned with monitoring his general state of health.

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Healthcare typologies

Health Precautioner – General attitude

Frequency of doctor visits

Several times a month	1%
Once a month	6%
Several times a year	15%
Rarely	78%

Desire to live healthier

Yes	45%
No, I already live a healthy life	40%
No, that is not important to me	15%

Average age: 55 years

Attitudes towards health issues

I pay attention to my diet	70%
I attend regular preventive medical check-ups	39%
I regularly do sports	38%
I often worry about my health	37%
I order prescription drugs online	34%
I order over-the-counter drugs online	18%

The Health Precautioner is relatively old with an average age of 55 years. He lives a comparatively healthy life and pays particular attention to his diet. He rarely visits a doctor. When he does, he is primarily interested in preventive check-ups.

Base: Health Precautioner, n=119

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Healthcare typologies

Health Precautioner – Use of medical apps

Use of medical apps

Fitness tracker	17%
Health record app, like the NHS app	16%
Symptom checker	12%
App for medical advice	8%
Mental health app	3%
Medication reminder	1%
Other medical app	1%
I haven't used any medical app yet	58%

Features of a health app: Very willing

Treatment reminders (e.g. vaccination reminders, cancer screenings)	18%
General wellness (e.g. diet tracking, exercise tracking, stress management)	14%
Treatment of conditions (e.g. medication management, telemedicine)	10%
E Pre-emptive diagnosis (monitoring my health statistics and alerting me if unusual trends develop)	10%
Diagnosis (e.g. symptom checkers, self-diagnosis tools)	8%

The Health Precautioner is hardly interested in medical apps and their functions.

Base: Health Precautioner, n=119

Health-Study 2023 | UK

Healthcare typologies

Health Pragmatist – General attitude

Frequency of doctor visits

Several times a month	0%
Once a month	0%
Several times a year	1%
Rarely	99%

Desire to live healthier

Yes	72%
No, I already live a healthy life	24%
No, that is not important to me	4%

Average age: 50 years

Attitudes towards health issues

I pay attention to my diet	67%
I often worry about my health	44%
I regularly do sports	39%
I order prescription drugs online	27%
I attend regular preventive medical check-ups	25%
I order over-the-counter drugs online	18%

The Health Pragmatist rarely visits a doctor. Nevertheless, he occasionally wishes to live healthier and pays particular attention to a healthy diet.

Base: Health Pragmatists, n=470

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Healthcare typologies

Health Pragmatist – Use of medical apps

Use of medical apps

Health record app, like the NHS app	32%
Fitness tracker	25%
Symptom checker	20%
App for medical advice	8%
Mental health app	7%
Medication reminder	4%
Other medical app	2%
I haven't used any medical app yet	36%

Features of a health app: Very willing

Treatment reminders (e.g. vaccination reminders, cancer screenings)	35%
General wellness (e.g. diet tracking, exercise tracking, stress management)	27%
Diagnosis (e.g. symptom checkers, self-diagnosis tools)	19%
E Pre-emptive diagnosis (monitoring my health statistics and alerting me if unusual trends develop)	18%
Treatment of conditions (e.g. medication management, telemedicine)	16%

The Health Pragmatist is hardly interested in using specialised medical apps, e.g. for medical counselling or to improve mental health.

Base: Health Pragmatists, n=470

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Sociodemographics

Sex	
Male	49%
Female	51%
Age	
18-29 years	19%
30-39 years	17%
40-49 years	16%
50-59 years	17%
60 + years	31%
Highest academic qualification	
No formal qualifications	4%
middle - GCE 'A' level, NVQ3, Scottish Higher (or equivalent)	13%
GCSE Grades A to C, GCE 'O' level, CSE Grade 1, NVQ2 (or equivalent)	38%
Higher degree (MA, MSc, PhD etc)	10%
Degree, NVQ4, NVQ5 or equivalent	25%
BTEC (higher), BEC (Higher), TEX (Higher), HNC, HND (or equivalent)	8%
Other qualifications	2%

Base: All respondents n=1,000

Current occupation	
Self employed / business owner	8%
Senior executive	7%
Employee, worker, civil servant	54%
Freelancer / artist	1%
Farmer	0%
Housewife / househusband	9%
Apprentice / student	1%
Pensioner	7%
Currently unemployed	13%
Household income	
Under £20,000	24%
£20,000 - £29,999	21%
£30,000 - £49,999	29%
£50,000 - £69,999	12%
Above £70,000	9%
Prefer not to respond	5%

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