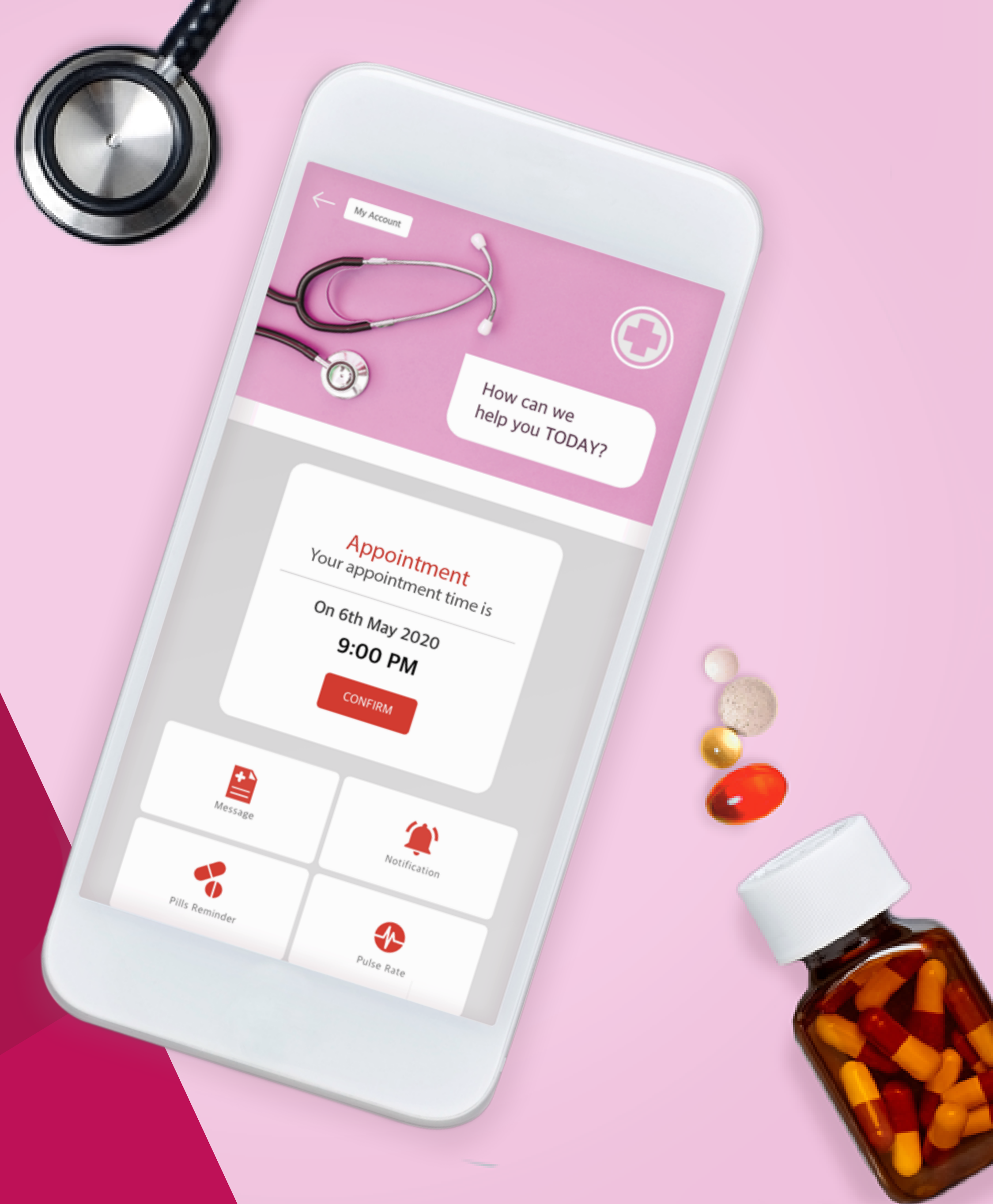


# Digital healthcare

Understanding the evolution  
and digitization of healthcare

INSIGHT REPORT 2020

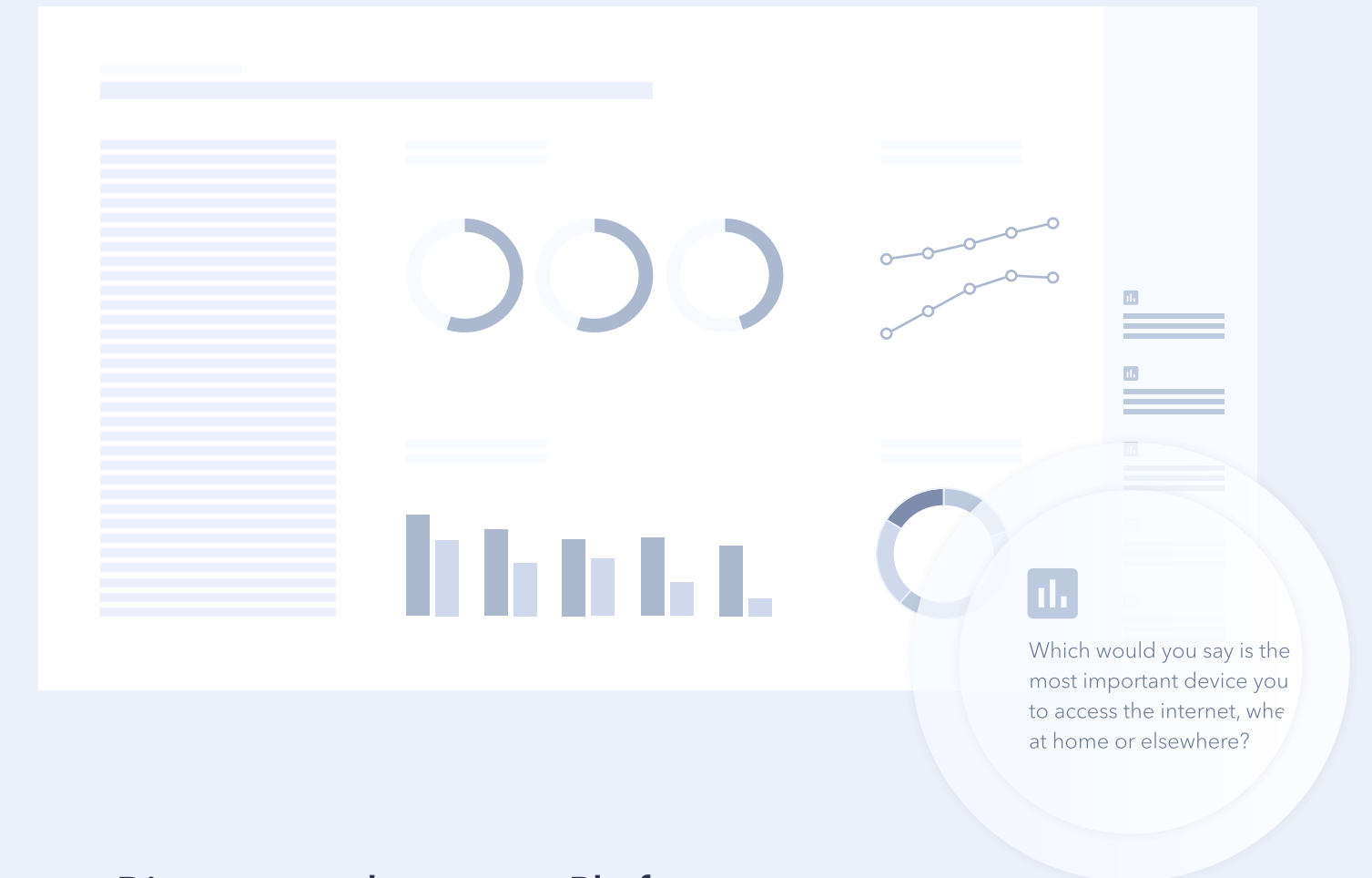
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# What's inside?

- 03** Introduction
- 04** Key insights
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- 10** Wearable technology goes mainstream
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## UNDERSTANDING THIS REPORT



### Discover our data on our Platform

- Each chart from our **ongoing global research** in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time and among custom audiences. You can find the corresponding question to each chart in the right hand column, starting from left to right. Any charts which do not contain a hyperlink are from a GWI custom study. Custom study data is not available to explore on our Platform.

### Click to explore further

- Our other reports and infographics
- Explanations of GWI's segmentations or methodology

# Introduction

GlobalWebIndex Insight reports take a deep-dive into the crucial topics of the industry, exploring some of the most pressing topics for marketers. In this report, we put the spotlight on the healthcare industry, with a particular focus on the UK and U.S.

**This report focuses on three key areas:**

- ✔ **The evolution of health and wellness** - examines how health and wellness has become more holistic over time and addresses the role alternative therapies play in consumers' lives.
- ✔ **Wearable technology goes mainstream** - looks at the rise of smartwatches around the world, taking a deep dive into how and why U.S. and UK consumers are using smartwatches. This also covers the future potential and barriers of wearables.
- ✔ **AI and digital health technologies** - analyzes the increasing importance of AI and digital technologies, like telehealth in healthcare, and how these technologies can help alleviate the strain on hospitals and medical workers amid the current COVID-19 health crisis.

# Methodology

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle East and Africa, and the Asia Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

When reading this report, please note that we use a mixture of global data from our ongoing quarterly global research, as well as data from 3 custom studies conducted in the U.S. and UK. The objective of these custom studies was to dig deeper into specific healthcare trends. Survey dates and respondent sample sizes are below:

**August 2019** - 2,681 (U.S.) and 2,864 (UK) internet users aged 16-64

**January 2020** - 2,050 (U.S.) and 2,229 (UK) internet users aged 16-64

**March 2020** - 2,581 (U.S.) and 2,093 (UK) internet users aged 16-64

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.



# Key Insights

## 01

### Health and wellness has reached a new peak - helped by technology

For consumers, exercise is just one part of wellbeing. Consumers are turning to health apps more to manage their health and wellbeing. In 2012, 11% of internet users said they used a health and fitness app in the last month, rising to 26% in 2019. Even among baby boomers, around 1 in 5 say they have used a health and fitness app in the last month. Given the prevalence of mental health conditions, health apps could prove especially valuable in helping consumers across different generations to get the support they need.

## 02

### Complementary therapies come to the forefront

As the world deals with the novel coronavirus (COVID-19) crisis, looking after our mental wellbeing has become increasingly important. From custom research run in the U.S. and UK in January 2020, there's clear demand for alternative therapies and consumers are generally very positive, with 47% believing that alternative therapies are effective for general health. Consumers are keen to try a range of complementary therapies like CBD oil, massages, and herbal medicines. Younger generations also show a greater interest in ASMR videos - around 1 in 5 Gen Z in the U.S. and UK have watched an ASMR video in the last month.

## 03

### Smartwatch ownership ticks upwards - fueled by growth in APAC, Europe, and North America

Wearable technology devices, like smartwatches, are no longer reserved for the wealthy fitness fanatics. Around 1 in 5 global internet users now own a smartwatch or smart wristband, a 46% increase since 2014. APAC has always been ahead of the curve, but the biggest increases can be found in North America and Europe. Smartwatches have also evolved into a more sophisticated health tracking tool, with around 2 in 5 smartwatch/fitness tracker owners in the U.S. and UK using them to track their heart rate and sleep.

## 04

### Digital health technologies like telehealth will become increasingly important, helping to alleviate the strain on the healthcare system

Increased healthcare costs, shortages of medical workers, and an unprecedented outbreak of COVID-19, have pushed healthcare systems to the brink. However, telehealth can help ease the burden and consumers are keen to embrace digital technologies too. In custom research from August 2019, half of U.S. and UK consumers say the ability to consult with a doctor by a phone/video call instead of in-person would help them manage their health more effectively. And in a separate custom study from March 2020, around 6 in 10 consumers in the U.S. and UK believe digital health appointments are effective in managing the spread of COVID-19.

## 05

### AI opens the doors for greater preventative and precise healthcare - but privacy concerns are a worry

Around 3 in 5 U.S. and UK consumers agree AI will reshape the healthcare environment within the next 10 years. Our research found that the benefits of AI for consumers are largely centered around its ability to offer greater preventative care and create efficiencies. However, for half of consumers in the U.S. and UK, privacy and security issues are key concerns. And as more tech giants play in this space, it's crucial to build consumer trust.

01

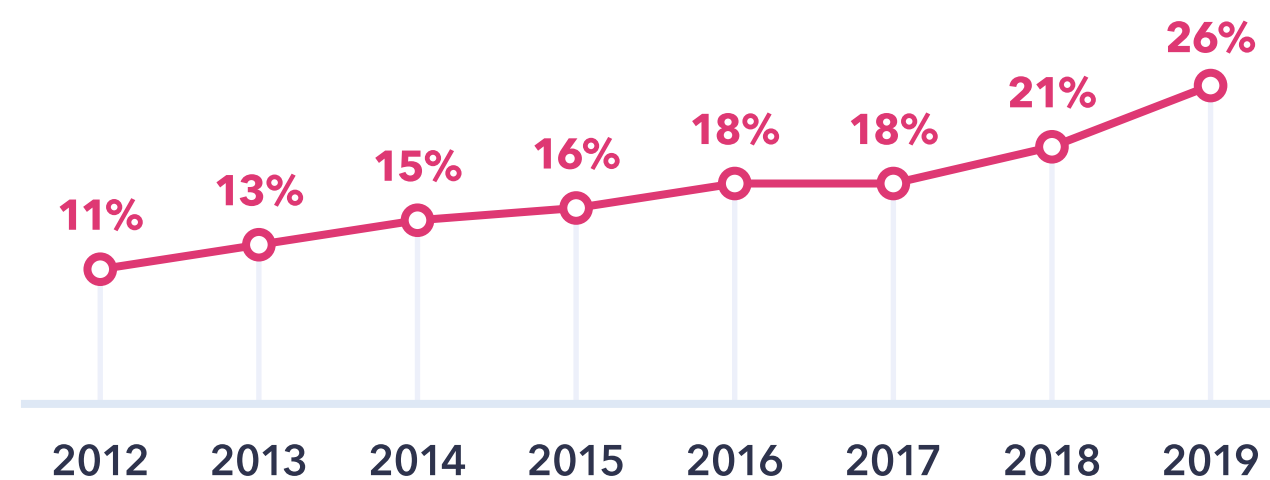
Digital healthcare

# **The evolution of health and wellness**

# A greater focus on holistic wellbeing

## INCREASING HEALTH-CONSCIOUSNESS\*

% of global internet users who say they have used a health, fitness and nutrition app in the last month

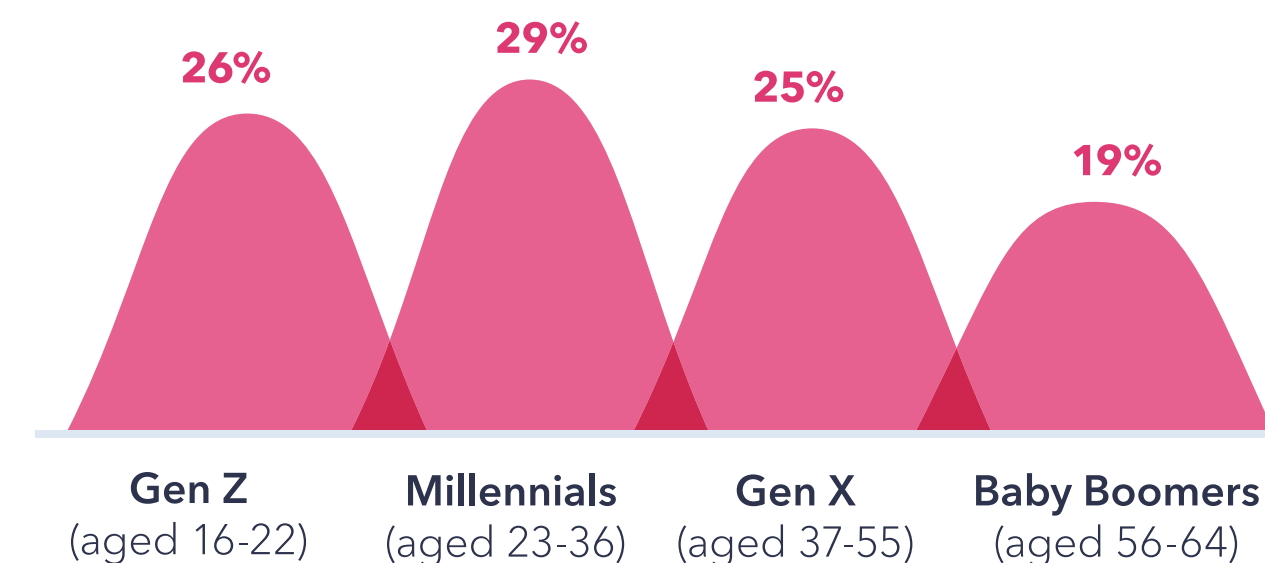


Healthcare systems around the world are under increasing strain and facing new pressures. Climate change will lead to increased spillovers into health issues, healthcare costs are climbing, **non-communicable** diseases such as mental health conditions and heart disease pose considerable challenges, and an unprecedented **outbreak** of novel coronavirus, or COVID-19, have pushed healthcare systems to the brink.

These are just some of the challenges facing the healthcare industry in 2020.

Despite these challenges, **new technologies like AI, telehealth, and wearables, as well as greater proactivity from consumers, are key in helping to address some of the hurdles facing**

## BY GENERATION (2019\*\*)



**the healthcare industry.** This is a recurring theme that will be explored throughout this report.

Using our global data, we found that consumers are taking matters into their own hands. For example, 30% of global internet users say they go to the gym at least 2-3 times a week, rising to 35% in the Middle East & Africa and dropping to 19% in Europe. But exercise is just one facet of wellbeing. **In 2012, 11% of internet users said they used a health and fitness app in the last month, rising to 26% in 2019 - a growth of 136%.** While millennials are engaging with health apps the most (29%), baby boomers are not too far behind (19%) - highlighting that health apps, regardless of age, allow users to take more control over their health on devices they use every day.



**Mental illness is not a personal failure. In fact, if there is failure, it is to be found in the way we have responded to people with mental and brain disorders"**

**- Dr Gro Harlem Brundtland, Director-General of WHO**

Mental health is one area where apps could prove extremely valuable. According to the World Health Organization (WHO), 1 in 4 people in the world will be **affected** by mental health conditions at some point in their lives. **As the healthcare industry becomes increasingly burdened, digital apps provide an alternative route for consumers to be able to get the treatment and support they need.**

\*Please note that the data point "Health and Fitness" apps was changed to "Health, Fitness and Nutrition" apps in Q2 2019

\*\*Data includes Q2-Q4 2019 only



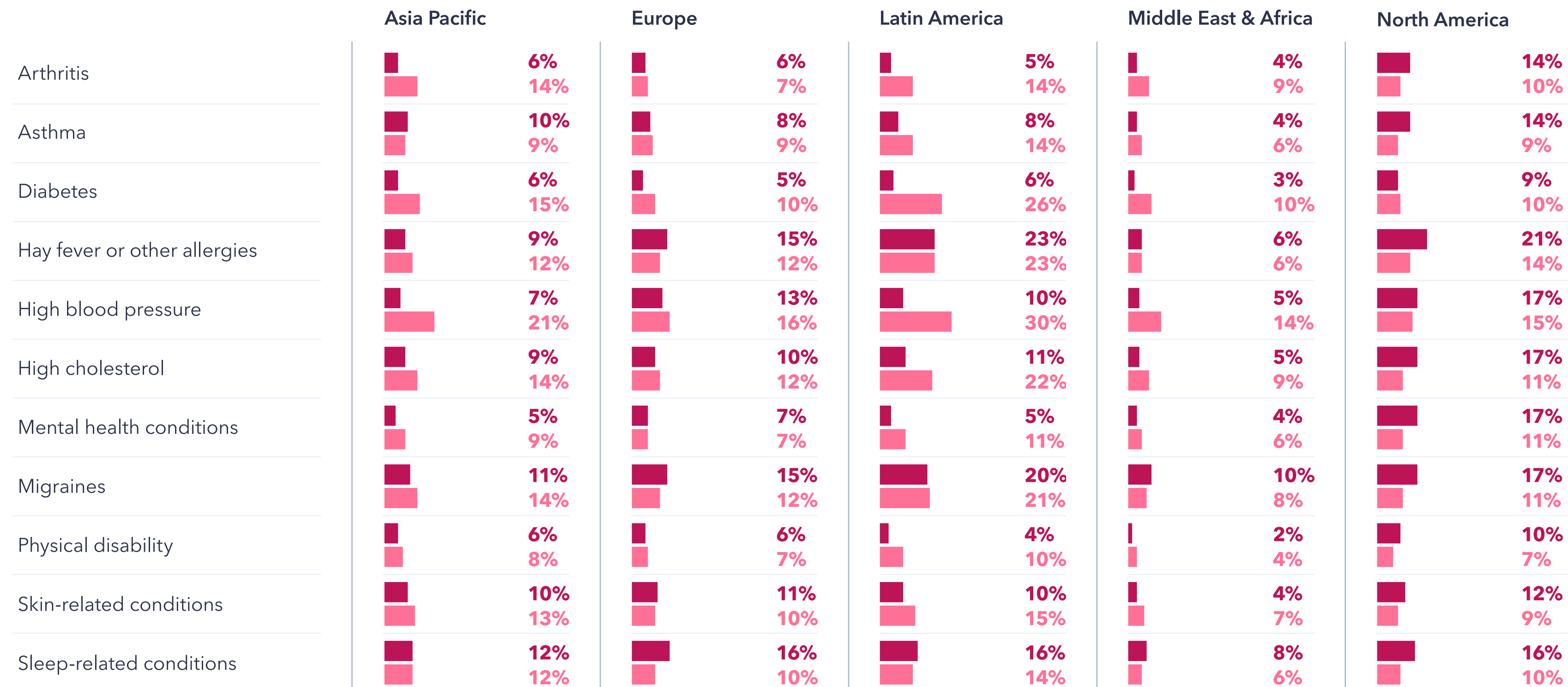
**Question:** In the last month, which of these app types have you used? Health and fitness (to Q1 2019) | Health, Fitness and Nutrition (since Q2 2019)

**Source:** GlobalWebIndex 2012-2019 (averages of waves conducted between Q2 2012-Q4 2019)

**Base:** 61,196 (2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018) and 598,185 (2019) internet users aged 16-64

# Health conditions around the world

% of internet users in each region who personally have/know somebody in their household with any of the following conditions



- I have this condition
- Someone else in my household has this condition

\*Healthcare conditions question is asked to respondents aged 18+ only

**Australia, Canada, New Zealand, and the U.S. have the highest rates of self-reported mental health conditions in the West**

**Diabetes and high blood pressure are the biggest health issues in Latin America among household members**



**Question:** Do you personally, or does anyone in your household, currently have any of the following conditions?

**Source:** GlobalWebIndex Q4 2019

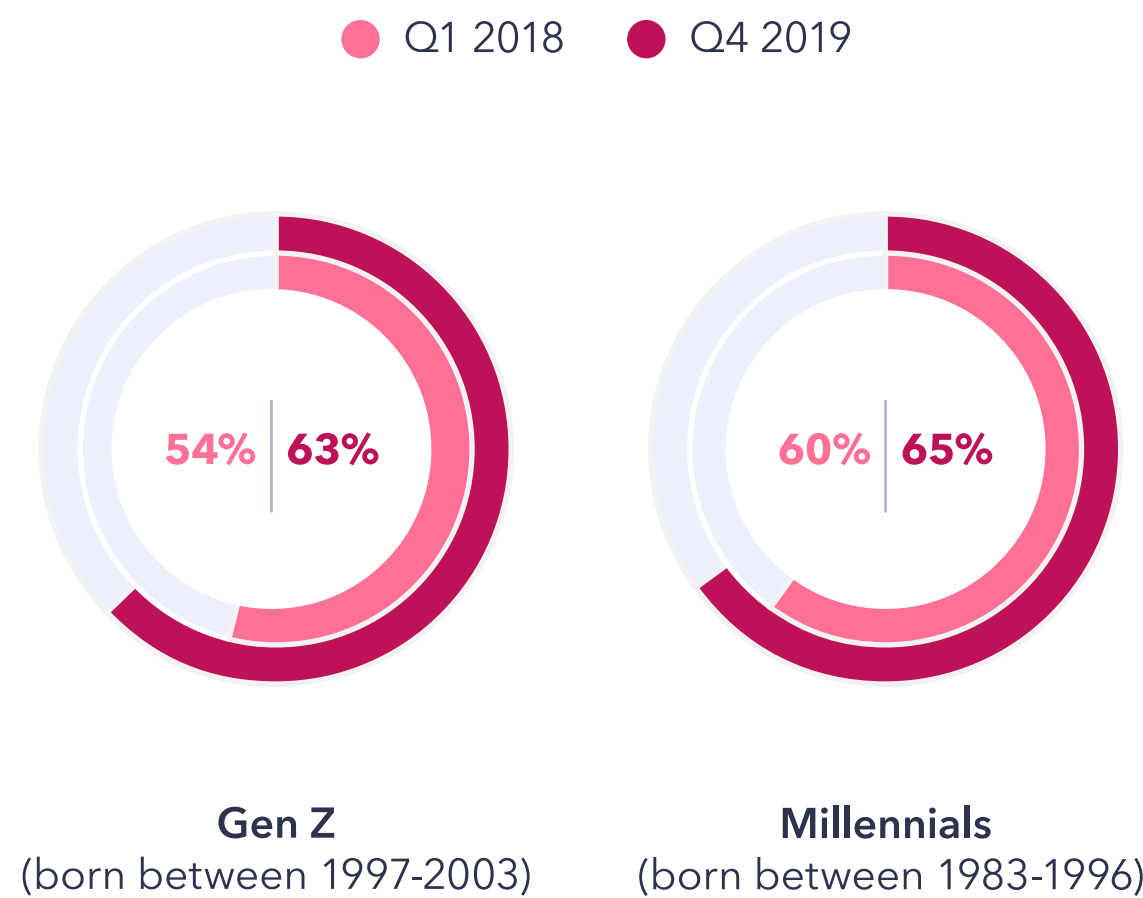
**Base:** 139,818 internet users aged 18-64\*

# Mind, body, and soul

Around two-thirds of U.S./UK consumers associate “being healthy” with getting enough sleep and taking care of their mental health - these were more important than diet or physical fitness

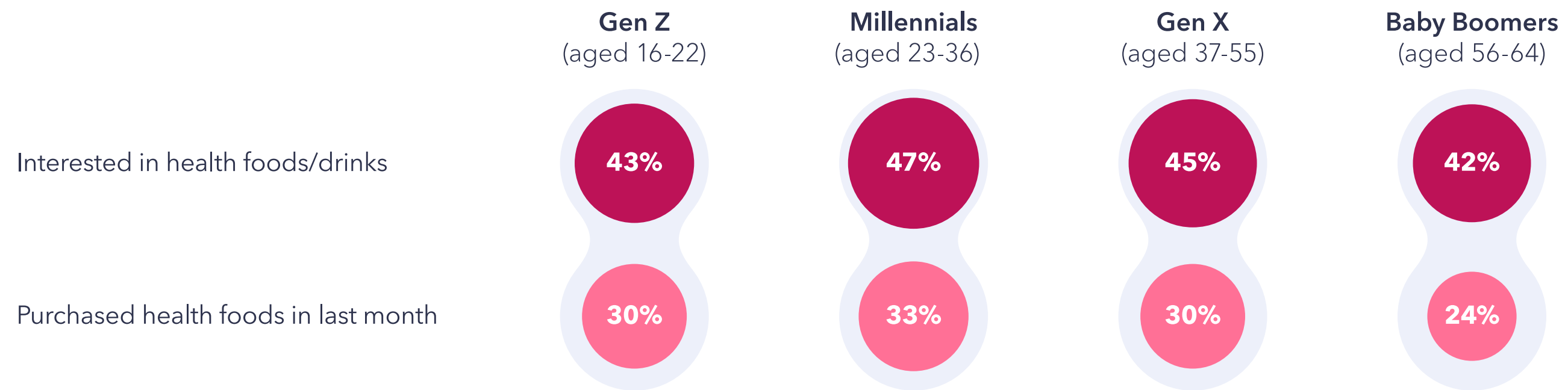
## DEMAND FOR NATURAL PRODUCTS IS ON THE RISE

% of global internet users who say they try to buy natural/organic products



## THE GAP BETWEEN HEALTH FOOD INTEREST VS. PURCHASE

% of each group who are interested in health foods/drinks vs. have purchased health foods in the last month



The health and wellness industry includes everything that promotes physical and mental wellbeing such as yoga, healthy eating, personal care, and meditation. According to the Global Wellness Institute, the global wellness economy was a **\$4.5 trillion market** in 2018 and represents around 5.3% of global economic output.

Our relationship with wellness has evolved from perhaps having an occasional massage or going to the gym to a more holistic approach that affects our everyday life and decision-making.

This comes to light in our global research, especially among younger internet users who are key drivers of the health and wellness trend. We found that **63% of Gen Z and 65% of**

**millennials agree they try to buy natural/organic products - the highest of all generations.** For Gen Zs, there has been a significant jump in those who say they try to buy natural/organic products, rising by 9 percentage-points since the start of 2018. It's still a cross-demographic trend though; 3 in 5 Gen X and half of baby boomers agree with this statement too.

What consumers put into their body is clearly important with 45% of global internet users having an interest in health foods and drinks. **However, there's also a clear gap between interest and purchase of health foods and drinks, which is likely due to cost.** This is most noticeable among baby boomers, with 42% saying they're interested in health foods/drinks; yet only 24% have purchased them in the last month.



**Question:** To what extent do you agree/disagree with the statements below on your perception of yourself? (I try to buy natural/organic products)  
**Source:** GlobalWebIndex Q4 2019 **Base:** 11,047 (Q1 2018) and 22,443 (Q4 2019) internet users born between 1997-2003 and 34,567 (Q1 2018) and 52,766 (Q4 2019) internet users born between 1983-1996



**Question:** Which of these things are you interested in? (Health foods/drinks) | In the last month, which of these have you or your household purchased? (Health foods)  
**Source:** GlobalWebIndex Q4 2019 **Base:** 22,443 internet users aged 16-22, 52,766 internet users aged 23-36, 51,302 internet users aged 37-55, 15,506 internet users aged 56-64



# The role of alternative wellness

**Globally, 93% of Gen Z have watched a video clip or visited a video-sharing site and 60% have watched a vlog online in the past month, compared to 51% of internet users worldwide**

## ALTERNATIVE THERAPIES SHOW PROMISE

% of internet users in the U.S. and UK who have tried/would like to try the following kinds of treatment



It's clear mental wellbeing is just as important as physical wellness, probably **now** more than ever given the current situation with COVID-19 as anxiety and loneliness heightens, and as daily routines are thrown into disarray. Alternative or complementary therapies can play a crucial role to help alleviate stress, encourage better sleep, and promote healthier mental wellbeing overall. Considering that the U.S. has some of the highest self-reported figures for mental health conditions, we carried out custom research in the U.S. and UK to dig into healthcare further.

**We found there's clear demand in the U.S. and UK for a range of alternative therapies and consumers are generally very positive, with 47% believing that alternative therapies are effective** for health generally. Aside from massages, consumers are keen to try CBD oil and herbal medicines with around 1 in 3 saying they'd like to try these in future. CBD oil has been marketed as a cure-all solution, with a particular focus on alleviating anxiety.

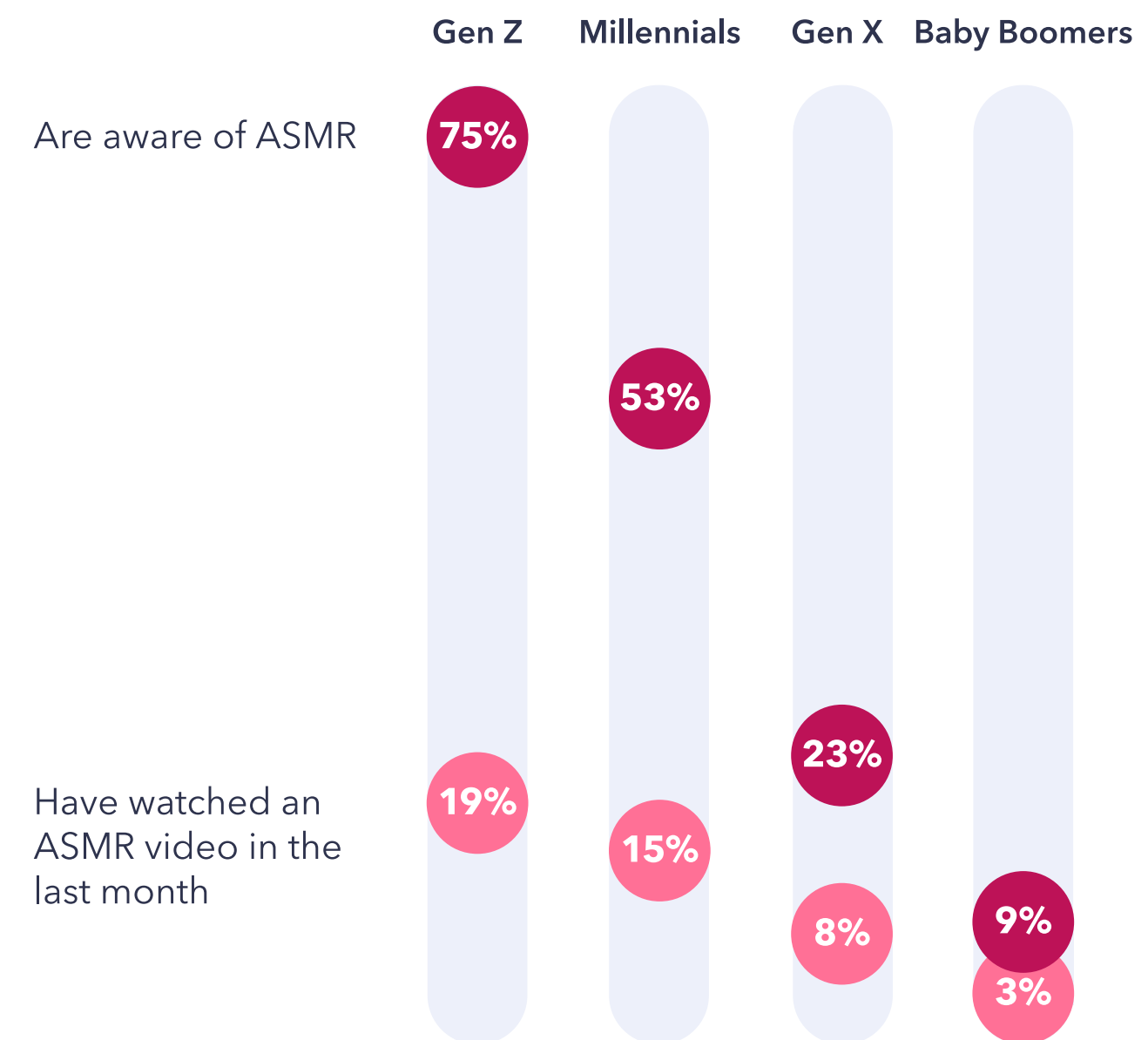
Another relatively new way of stress-busting is **ASMR**, which stands for autonomous sensory meridian response. It describes a feeling of euphoric tingling and relaxation that happens when a person watches videos of people doing pretty mundane tasks, such as brushing their hair, eating crunchy food, scratching surfaces, or simply whispering.

In the U.S. and UK, **awareness of ASMR is highest among Gen Z at 75%, dropping to 53% for millennials and then more steeply to 9% for baby boomers.** And around 1 in 5 Gen Z have watched an ASMR video online in the last month, which makes

sense considering this group's fondness for video content. With healthcare resources under significant strain, the potential of complementary therapies will become even more vital.

## AWARENESS AND USAGE OF ASMR

% of internet users in the U.S. and UK who...



**Question:** Which of the following, if any, have you tried in the past three months to improve your health? | And which of the following would you be willing to try sometime in the future? **Source:** GlobalWebIndex January-February 2020 **Base:** 2,050 (U.S.) and 2,229 (UK) internet users aged 16-64

**Question:** Before taking this survey, had you heard of the term "ASMR" before? | Which of the following types of video have you watched online in the last month? **Source:** GlobalWebIndex January-February 2020 **Base:** 363 internet users aged 16-22, 797 internet users aged 23-36, 1,648 internet users aged 37-55, 500 internet users aged 56-64

02

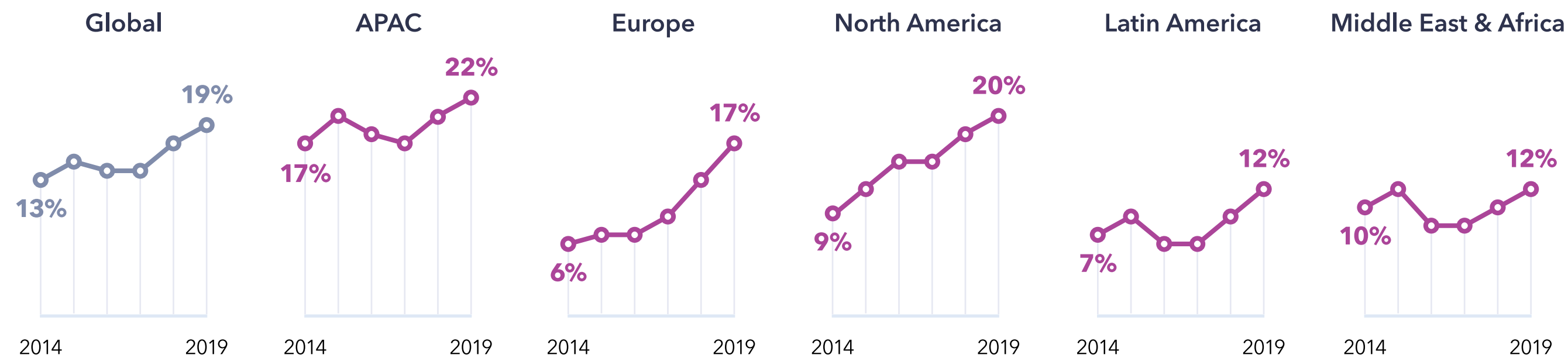
Digital healthcare

# **Wearable technology goes mainstream**

# Smartwatch ownership is growing

## SMARTWATCH/SMART WRISTBAND OWNERSHIP TICKS UPWARDS

% of global internet users who own a smartwatch/wristband



**Ireland has seen impressive growth in smartwatches/smart wristbands from 4% in 2014 to 21% in 2019 (425% increase)**

Wearable fitness technology, like smartwatches and fitness trackers, were once the preserve of the most affluent fitness fanatics. Today, a growing number of consumers are using wearable technology to carry out different functions, from tracking their heart rate to sending their data directly to their doctor. According to Technavio, the global wearable technology market is expected to **grow** at a compound annual growth rate of over 13% between 2020-2024.

**Around 1 in 5 global internet users now own a smartwatch or smart wristband; a 46% increase since 2014.** On a regional level, APAC and North American internet users are ahead of the curve for smartwatch/smart wristband ownership (22% and 20% respectively). While APAC has been ahead since 2014, **the biggest increases can be found in North America and Europe.** In Europe, ownership of these devices has jumped up from 6% in 2014 to 17% in 2019 (183% increase). Similarly, in North America ownership has increased from 9% in 2014 to 20% in 2019 (122% increase).

On a country basis, growth in APAC is driven by China (27%), Hong Kong (26%), and Singapore (26%). In Europe, Spain and Ireland are some of the biggest markets for these devices. While,

## TOP 10 COUNTRIES FOR SMARTWATCH/SMART WRISTBAND OWNERSHIP IN 2019

China	27%	Ireland	21%
Hong Kong	26%	Taiwan	21%
Spain	26%	U.S.A.	20%
Singapore	26%	Australia	20%
India	24%	UAE	20%

the U.S. leads the way for North America at 20%. According to Business Insider Intelligence research, fitness tracker and health-based wearables in the U.S. will **grow** at an annualized rate of 10% to surpass 120 million by 2023.

**There's a common misconception that wearable tech is reserved for higher-income earners.** As we saw with the smartphone, though, this is becoming less true. In 2014, only 35% of wearable owners were in the middle income bracket, yet this has steadily increased to 48% in 2019. **Wearables have become more democratized over time,** and in turn, a wider group of consumers are benefitting from the various features on offer. In the healthcare industry, wearables seem to have found their niche that has helped to fuel growth.

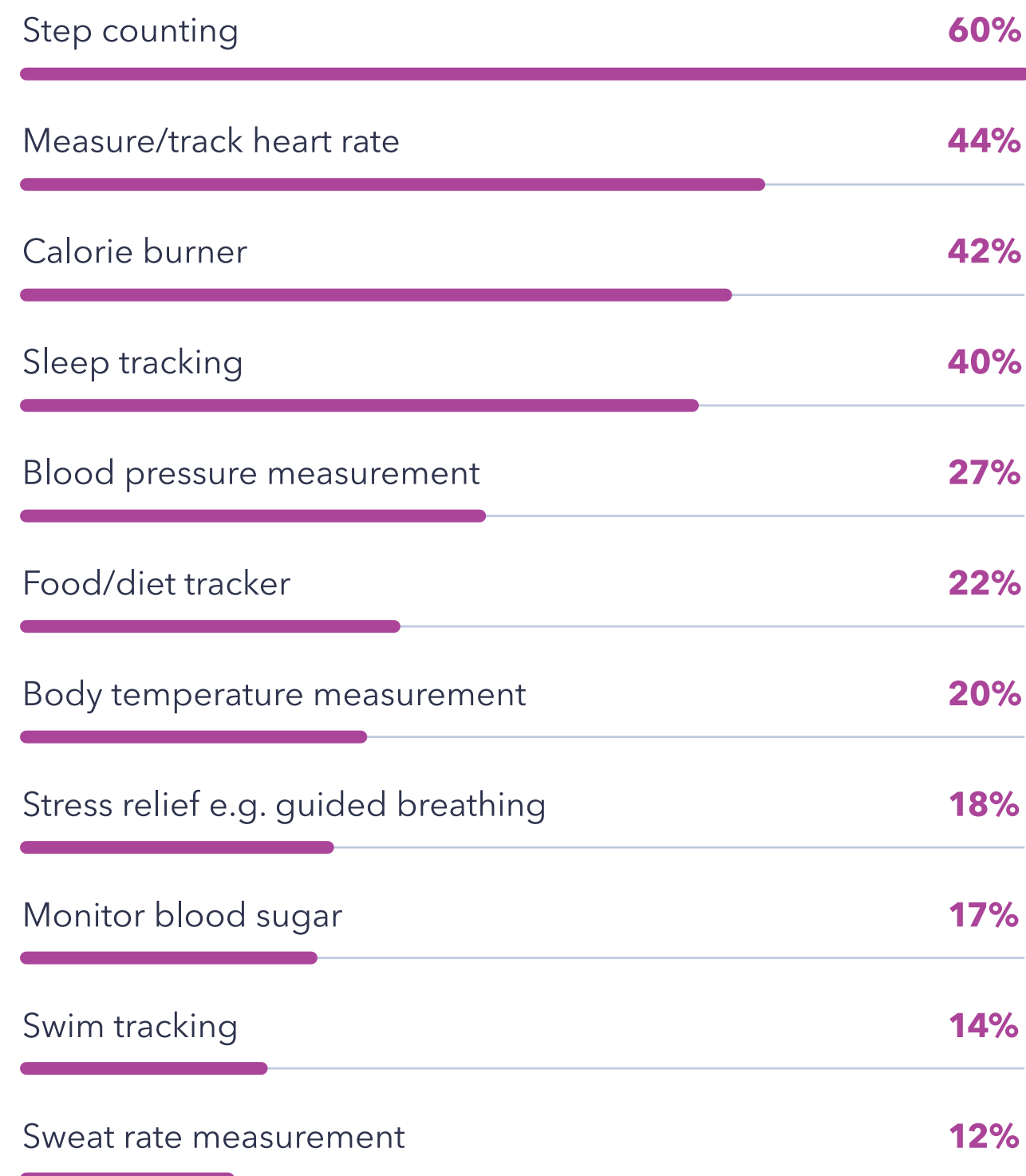


**Question:** Which of the following devices do you own? (Smartwatch/smart wristband)  
**Source:** GlobalWebIndex 2014-2019 (averages of waves conducted between Q3 2014-Q4 2019) **Base:** 83,804 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), 598,185 (2019) internet users aged 16-64

# What do consumers use their smartwatch/fitness tracker for?

## USES OF SMARTWATCHES/FITNESS TRACKERS

% of smartwatch/fitness owners in the U.S. and UK who say they use their wearable for the following reasons



With Google's mammoth acquisition of Fitbit for **\$2.1 billion** last year, the healthcare wearable industry is set to gain even further momentum. But why do people use wearables like smartwatches and fitness trackers in the first place?

In custom research from March 2020 in the U.S. and UK, we found that 3 in 5 smartwatch/fitness tracker owners use their wearable for step counting. **While fitness and activity features are still important features for many, we're also seeing consumers use their devices for more sophisticated health tracking that moves beyond simply monitoring activity or diet.** For example, 44% of smartwatch/fitness tracker owners use their device to measure or track their heart rate, 40% use it to track their sleep, and 27% use it for blood pressure measurement. As wearable technology continues to advance, its functions will further diversify and it will become an even more essential health monitoring tool. Omron Healthcare, for example, launched **HeartGuide** in 2019 which is the first wearable blood pressure monitor. The wearable also offers other useful features like step tracking and calories burned, making it quite a comprehensive health tracking device. However, at £499 it's got quite a steep price point, which might not be desirable for many.

Notably, younger audiences tend to use their wearables for a greater number of functions compared to Gen X and baby boomers who primarily use it for step tracking or tracking their heart rate. While 24% of millennials use their wearable for stress relief such as guided breathing, compared to 15% of Gen X and 12% of baby boomers.

There are also some notable differences by gender too. Females are more prone than males to using their devices to count steps, whereas males are much more likely to be using them for a range of other activities. For example, they're around 2x as likely as females to be using them to monitor their blood sugar (23% of males do), their body temperature (27%), and their sweat rate (16%). Our wider research in the UK and U.S. gives some context here - males are more likely than females to say they have related conditions such as high blood pressure, high cholesterol, and diabetes.

**Around 1 in 5 females in the U.S./UK say they use their smartwatch/fitness tracker for female health tracking - making this a more popular feature than diet tracking and stress relief**

**Question:** What do you use your wearable device for? **Source:** GlobalWebIndex March 2020 **Base:** 1,103 (U.S.) and 858 (UK) smartwatch/fitness tracker owners aged 16-64



# What do consumers find most useful about their smartwatch/fitness tracker?

In the U.S. and UK, 47% of smartwatch/fitness tracker owners say their device helps them manage their fitness, making it the primary benefit overall.

Interestingly, 45% say they enjoy looking at the data, highlighting consumers' need for more information, which is something many have become accustomed to in the age of digital sharing. **For Gen Z, looking at the data is what they enjoy most (44%), but this also largely appeals to Gen X (39%) and baby boomers (41%) too.** Gender also has an impact here, with 48% of females saying they enjoy looking at the data compared to 36% of males. This shows there's an element of curiosity too. Users enjoy looking at patterns and as consumers get even richer data on their body's signals, they'll continue to learn more about themselves than they might have before.

By income, higher earners tend to value the benefits of wearable technology on their sleep patterns more than those in the lower income group (34% vs. 25%, respectively). They're also slightly more likely to see the value of wearables on stress management (25% do), particularly males in the higher income group.

One of the most **exciting benefits of wearables is the ability to give consumers greater control over their own health.** Our data shows that around 2 in 5 smartwatch/fitness tracker owners say their device helps them to feel more in control of their health and helps them to proactively manage their health. **Helping consumers feel more in control over their health is important across all generations, and could prove especially valuable for older**

## BENEFITS OF SMARTWATCHES

% of smartwatch/fitness tracker owners in the U.S. and UK who say they find their wearable useful for the following reasons



**consumers who may benefit the most.** The **latest health insurer** to push the Apple Watch to customers is Devoted Health, a private Medicaid insurer, who is now subsidizing the cost of the watch for its members. This proves especially valuable for older patients as the watch can call for help if a person falls.

**Among U.S. smartwatch/fitness tracker owners, 20% say their wearable helps their doctor manage their health more effectively**

**Question:** What do you find useful about your wearable device? **Source:** GlobalWebIndex March 2020 **Base:** 1,103 (U.S.) and 858 (UK) smartwatch/fitness tracker owners aged 16-64

# The future potential of wearables

Next, we asked consumers in the U.S. and UK what features they would find most useful to manage and monitor as wearable technology develops.

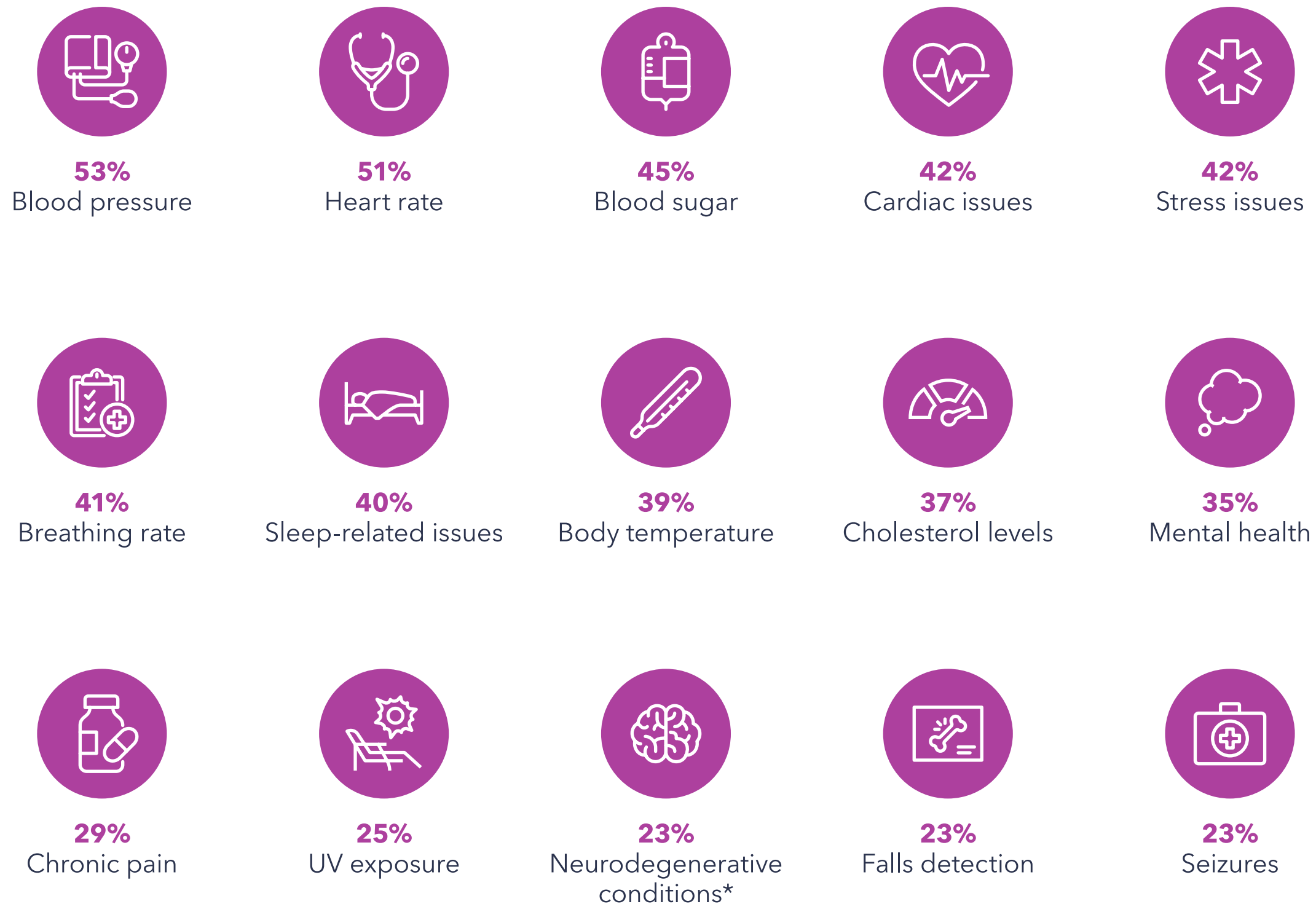
The most sought after feature among current wearable owners and those who plan to purchase one in the future is to manage blood pressure and heart rate. Many wearable manufacturers have already incorporated heart-tracking features, which was first introduced and made popular by Apple in their smartwatch, but there's obvious demand for more advanced health features. For example, **managing blood pressure and cardiac issues are considerably more important for older audiences, who stand to benefit the most from monitoring these aspects of their health.** Such uses have significant potential to keep users not only fit and healthy, but also safe, especially if they have a medical condition which requires constant monitoring. This could make patient care much more efficient on a wider level.

Additionally, between **40%-42% of current/future wearable owners also want to be able to manage sleep-related issues, track their breathing rate, and manage stress issues - highlighting just how important mental wellbeing is, and will continue to be, in the future.** All of this reinforces how wearables are moving beyond simple methods of measuring physical fitness and now have the capabilities to track less obvious measures of our personal wellbeing.

**49% of U.S./UK female current/future wearable owners want to be able to manage sleep-related issues more than men (33%)**

## WHAT FEATURES DO CONSUMERS MOST WANT FROM THEIR WEARABLE?

% of current and future wearable owners in the U.S. and UK who say the following features are the most useful to be able to manage and monitor



\*e.g. Alzheimer's, Parkinson's

**Question:** As health wearable technology develops, what features would you find most useful to be able to manage and monitor? **Source:** GlobalWebIndex March 2020 **Base:** 1,924 (U.S.) and 1,413 (UK) current/future wearable owners aged 16-64

# Barriers to wearable uptake

So far we've covered the benefits of wearables and their future potential. But there are also key barriers to uptake that need to be considered.

Currently, 28% of internet users in the U.S. and UK don't own a wearable and don't plan to purchase one in the future. The main reasons for this are a lack of interest and cost.

**Two-thirds of Gen Z non-wearable owners say they're simply not interested in wearables compared to just over half of other generations.** One of the possible reasons for this might be because they're younger and less worried about tracking their heart rate and blood pressure compared to older generations. Wearable devices also lack entertainment features, which might be a reason for the muted interest among some younger groups. **Other generations like millennials and baby boomers are primarily discouraged by the expense of wearables (47% and 49% respectively).**

**Privacy factors are also key concerns. Around 1 in 5 millennials, Gen X, and baby boomers don't want their health data to be accessible by others - compared to just 7% of Gen Z.**

Gen X (18%) and baby boomers (16%) are also more wary about trusting the consistency or accuracy of the data than Gen Z (5%) or millennials (12%). In the UK, 24% of non-wearable owners say they don't want to rely too much on technology compared to 17% in the U.S.

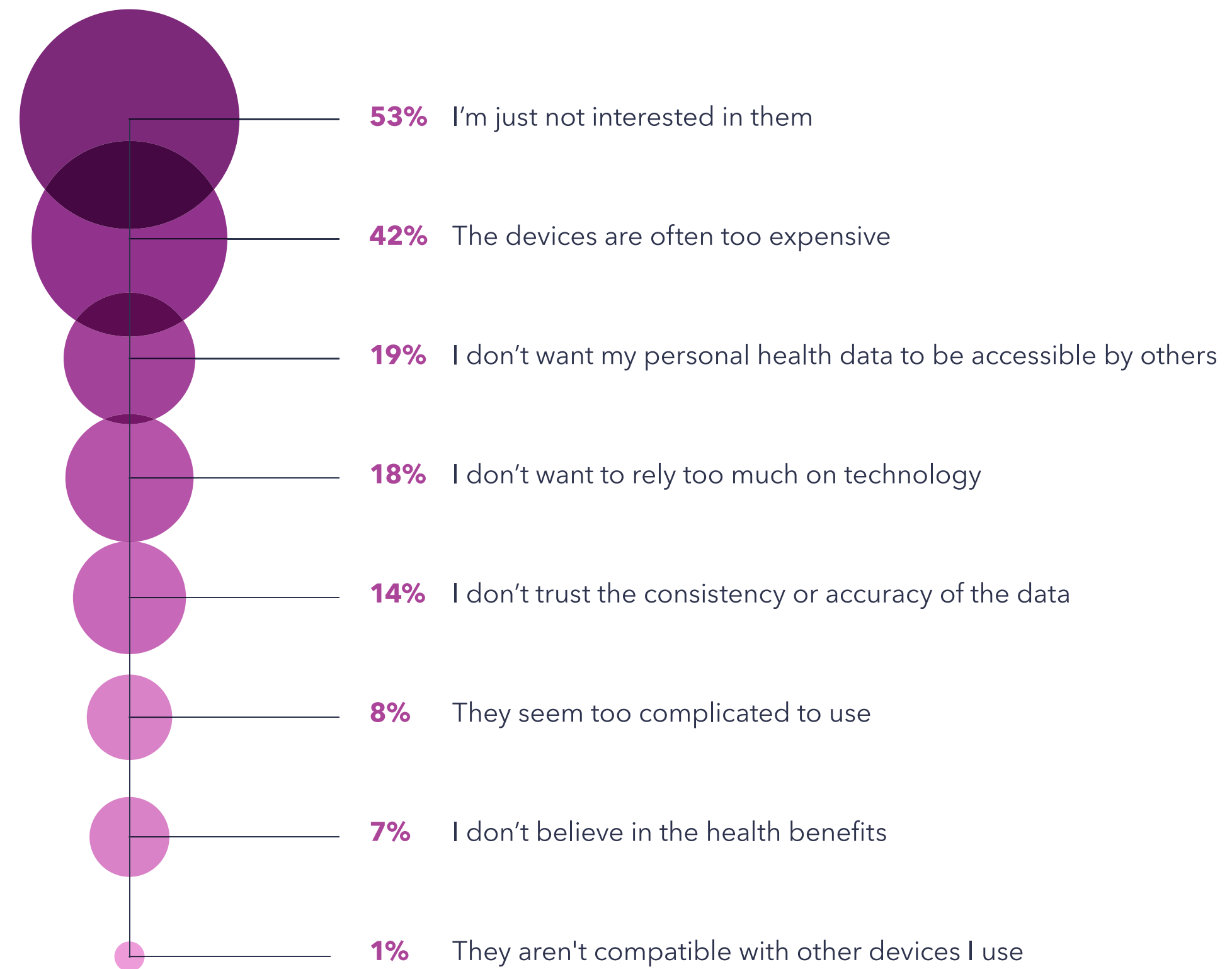
As might be expected, the cost of wearables was more of a deterrent for consumers in the lowest income bracket (46%). However, **even among those in the top income bracket, 37% say the devices are often too expensive.**

As such, although wearable technology is gaining popularity in lower income brackets, it will likely struggle to reach its full potential until it becomes more widely affordable and privacy concerns are addressed.

**Over one-third of U.S./UK non-wearable owners in the top income bracket say they don't trust the consistency or accuracy of the data compared to just 11% in the lowest income bracket**

## WHY ARE CONSUMERS NOT INTERESTED IN BUYING A WEARABLE?

% of non-wearable owners in the U.S. and UK who say they don't own/don't plan to buy a wearable for the following reasons



**Question:** You said you currently don't own a health wearable and don't plan to purchase one. Why is that?  
**Source:** GlobalWebIndex March 2020 **Base:** 657 (U.S.) and 680 (UK) internet users aged 16-64 who don't currently own a wearable device and don't plan on purchasing one

03

Digital healthcare

# **AI and digital health technologies**



# Taking control of our health

With the advent of new technologies such as Artificial Intelligence (AI), **telehealth**, and robotics, not to mention non-traditional entrants like Apple and Google, healthcare – as we know it – is changing.

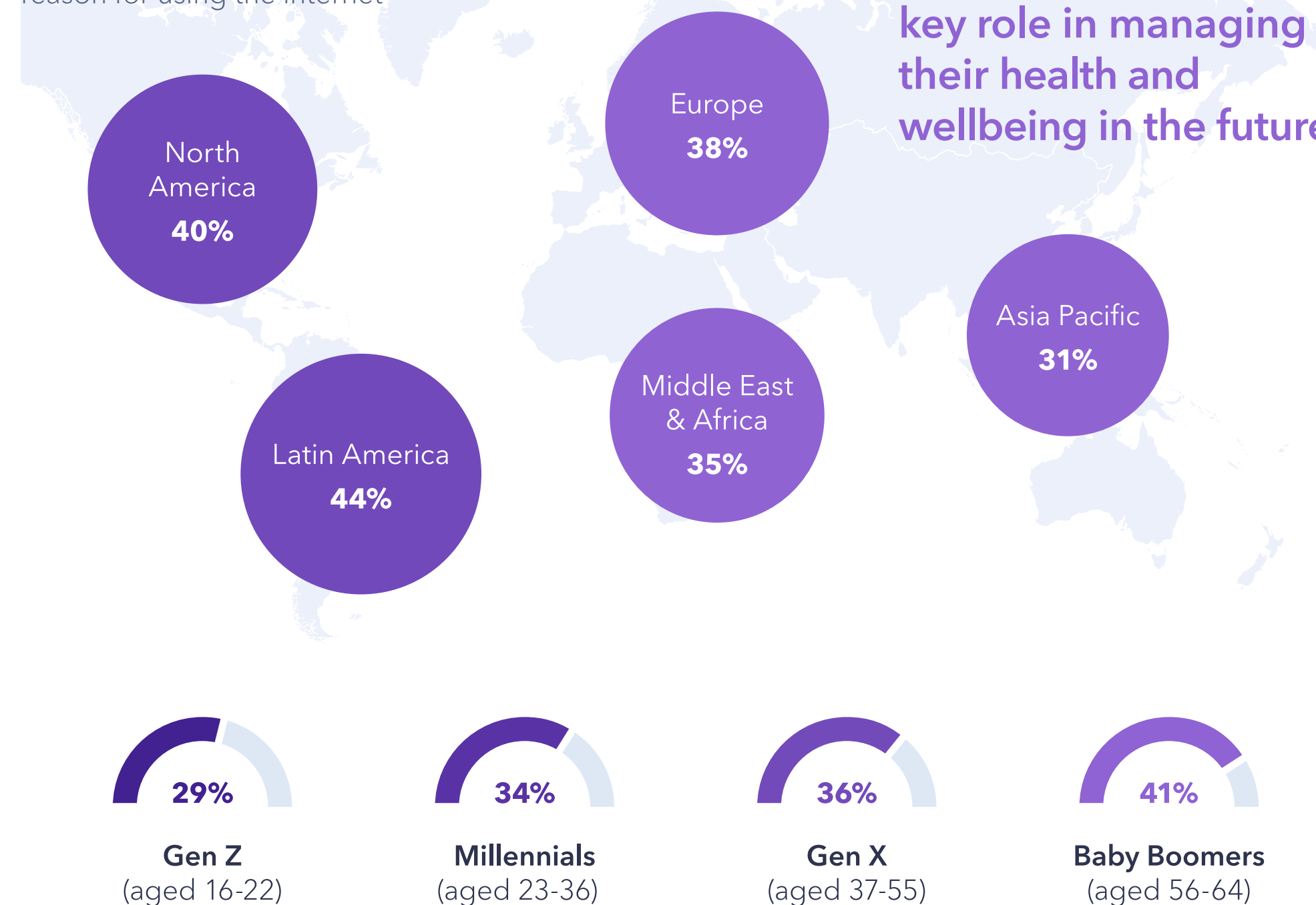
But this change isn't happening in a vacuum. Tech in healthcare is solving a problem. According to the World Health Organisation, global healthcare spending reached **\$7.5 trillion in 2016**, representing 10% of global GDP. There are several factors contributing to healthcare costs, such as growing and aging populations, increase in chronic diseases, and new infectious diseases – to name a few. As a result, hospitals and physicians are under immense strain. **Technology can play a key role in addressing these challenges and has the potential to redefine the healthcare system.**

Consumers are increasingly expecting the same digital experience in all aspects of their lives. We're able to use our mobile phones for banking activities and to shop online without stepping outside our front door, so why should healthcare be any different? With

healthcare spending escalating, it's now more important than ever to empower consumers to manage their own health. **Our global research reveals 34% of consumers are using the internet to research health issues and healthcare products, jumping up to 41% for baby boomers, where a focus on health becomes even more crucial.** This remains the case across all income groupings too, with 30% in the lower income group turning to the internet for more information. This increases slightly to 35% among those in the higher income group. We've also found over three-quarters of consumers use information or recommendations found online to help them decide which medicines to buy. This isn't restricted to younger internet users either – 66% of baby boomers rely on online medicine information/recommendations. **This reinforces the vital role the internet plays in healthcare research and education across all age brackets.** Access to relevant information helps consumers make more informed decisions and ask the right questions, which are both essential measures in fostering preventative and efficient care.

## RESEARCHING HEALTH ISSUES IS A KEY REASON FOR USING THE INTERNET

% of global internet users who say researching health issues/healthcare products is a key reason for using the internet



**Just over 70% of internet users in the U.S. and UK believe technology will play a key role in managing their health and wellbeing in the future**



**Question:** Which of these things are important reasons for you using the internet?

**Source:** GlobalWebIndex Q4 2019 **Base:** 142,017 internet users aged 16-64 and 22,443 internet users aged 16-22, 52,766 internet users aged 23-36, 51,302 internet users aged 37-55, 15,506 internet users aged 56-64

# Global health challenges

In a custom survey run in the U.S. and UK between 26th February 2020-3rd March 2020, we asked consumers here what global health challenges they feel are important to address in the next 12 months and found some notable differences between the two countries.

**Among U.S. consumers, the primary health challenge that's important to address are infectious diseases/viruses (59%),** which is expected given the sharp escalation of COVID-19 around the globe. Infectious diseases are also a priority health challenge among UK consumers (57%), second only to mental health needs. Given the escalation of events since research was collected in this study, these figures are likely to be even higher now.

**Rising healthcare costs is another significant challenge in the U.S. for over 51% of consumers, compared to 27% in the UK.** According to 2018 OECD data, the U.S. has the **highest** healthcare

costs in the world at \$10,586 per person. Even second-place Switzerland is considerably behind the U.S. at \$7,317. The lack of universal healthcare in the U.S. has always been a challenge, with more than **30 million** Americans having no health insurance. **Meanwhile, UK consumers place considerable importance on investing in healthcare workers compared to the U.S. (42% vs. 29% respectively).** At the time of writing, the UK's National Health Service (NHS) currently has around **100,000 vacancies** and is in desperate need of medical professionals.

Digital health technologies can have significant benefits in countries like the U.S. where healthcare costs are substantial, and often unpayable for many, and also in the UK where healthcare professionals are often overworked. Similarly, digital health can also play a key role in managing the current health crisis facing the world. These are areas that we'll touch on further in this section of the report.

**Around 3 in 5 internet users in the U.S. and UK think infectious diseases/viruses are an important global health challenge to address in the next 12 months**

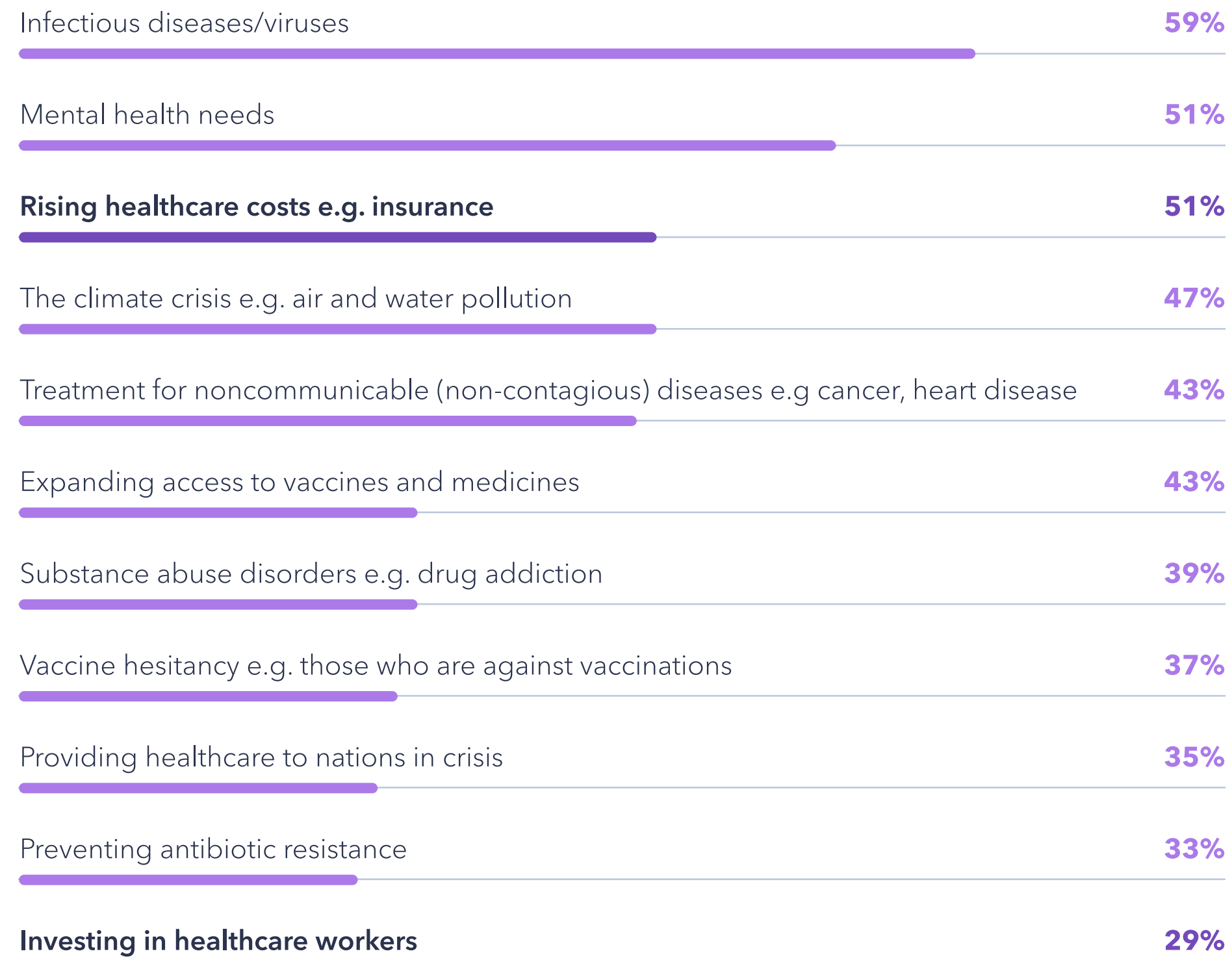


# Global health challenges

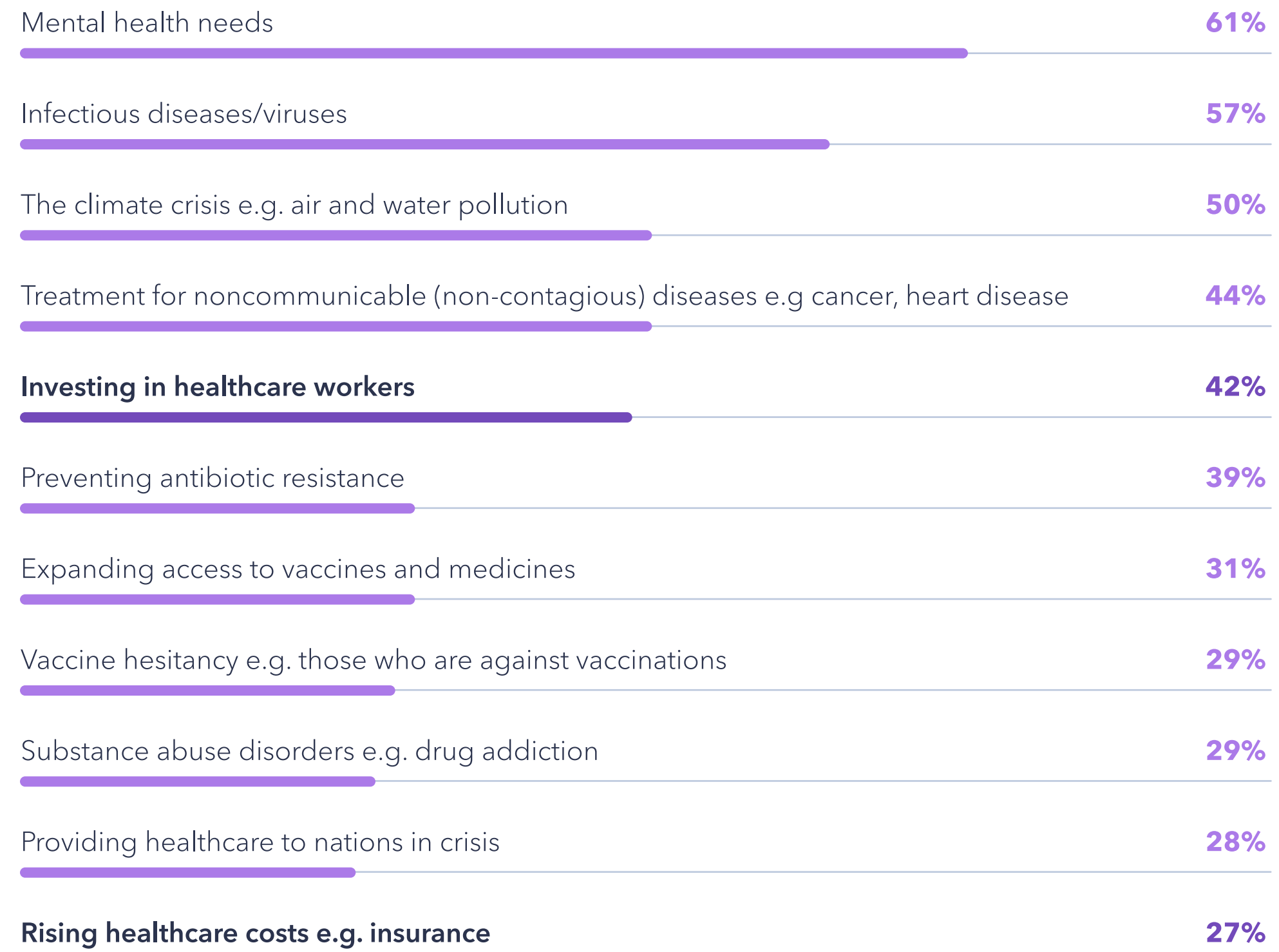
## BIGGEST GLOBAL HEALTH CHALLENGES FOR CONSUMERS

% of internet users in the U.S. and UK who say the following are the most important health challenges to be addressed in the next 12 months (fieldwork dates 26th Feb-3rd March)

### U.S.



### UK



**Question:** Which of the following global health challenges, if any, do you think are the most important to address in the next 12 months? Please select all that apply  
**Source:** GlobalWebIndex Feb-March 2020 **Base:** 2,581 (U.S.) and 2,093 (UK) internet users aged 16-64



# Conversations turn digital

Consumers are now ready for change and they're eager to embrace digital technologies. We asked consumers in the U.S. and UK which digital technologies would help them manage their health more effectively, and **our findings indicate accessibility to doctors and their health information are most in demand.**

One of the most exciting developments in healthcare for 2020 will be telehealth.

Half of U.S. and UK consumers say the ability to consult with a doctor by a phone/video call instead of in-person would help them manage their healthcare more effectively. This spikes to 58% for those in the highest income group, where they have a keener interest for most health technologies. **But even among internet users in the lowest income group, 47% say they would like the ability to consult with their doctor digitally.**

We asked consumers whether they've tried a digital health service that allows them to consult with their doctor via video or phone call, and while 56% said they haven't tried it

yet, they'd consider trying it in future. A further 13% said they've already tried it and would recommend it to others. This all highlights the considerable demand for digital health appointments. Interestingly, the ability to consult with a doctor by phone or a video call is less sought after among Gen Z (38%) compared to Gen X (55%) and baby boomers (50%). Again, this might be because Gen Z are less likely to have health issues or be concerned about them than older groups.

The main benefits for consumers who have used or would consider using digital appointments are that it's more convenient (63%), it frees up their time (54%), and it offers more flexibility with appointment times (52%).

**Half of U.S. and UK consumers say the ability to consult with a doctor by a phone/video call instead of in-person would help them manage their health more effectively**

## THERE'S STRONG DEMAND FOR DIGITAL HEALTH TECHNOLOGIES

% of internet users in the U.S. and UK who say the following health technologies could help them manage their health more effectively

The ability to find doctors and make appointments online	50%
The ability to consult with a doctor by a phone or video call instead of an in-person visit	50%
The ability to access all of my health information online	50%
The ability to complete any paperwork online in advance of my appointment	49%
The ability to order prescription refills through a smartphone app	48%
The ability to communicate electronically (e.g. texting, email or social media) with my doctor	48%
A symptom checker to help decide if I need to see a doctor	45%
A wearable device that connects with my smartphone to monitor my health	43%
A health tracking app to help manage my health	42%
A digital health assistant (e.g. chatbot) that can offer health advice and information	36%
A digital health coach that could help me manage chronic disease/pain	34%
I don't think any of the above could help me manage my health more effectively	6%

**Question:** Which of the following health technologies/features do you think could help you manage your health more effectively? **Source:** GlobalWebIndex August 2019 **Base:** 2,681 (U.S.) and 2,864 (UK) internet users aged 16-64



## • TREND IN ACTION •

## Telehealth lends a helping hand



**73% of higher-income U.S. and UK consumers believe digital health appointments are an effective way to manage the spread of COVID-19**

Many governments around the world are urging patients to steer clear of hospitals and their doctors if they show symptoms of COVID-19. Instead, they're advising patients to self-isolate at home and, only when really necessary, seek medical help.

As a result, telehealth efforts have stepped up in a bid to relieve the strain on hospitals and medical workers, keep medical workers safe, and ease the worry for patients. Providers like **Babylon Health** in the UK and **Teladoc** in the U.S. offer patients access to medical professionals through video or phone calls, and many have symptom checkers that offer guidance for patients. **From custom research run in the U.S. and UK in early March**

**2020, 6 in 10 consumers believe that digital health appointments are effective in managing the spread of the virus and close to half would consider using digital health services if they were available (12% already do).**

Since the outbreak of COVID-19, China has seen an enormous boost in patients turning to telehealth. As reported in The Economist, **Chinese telemedicine services** such as Ali Health (part of Alibaba), JD Health, and WeDoctor launched online clinics to triage and treat patients across the country. JD Health's monthly consultations have grown tenfold since the outbreak to **2 million** patients. In the U.S., Teladoc and American Well are also taking note and have ramped up efforts.

Meanwhile, Babylon Health in the UK is training its **health chatbot** to recognize COVID-19 symptoms.

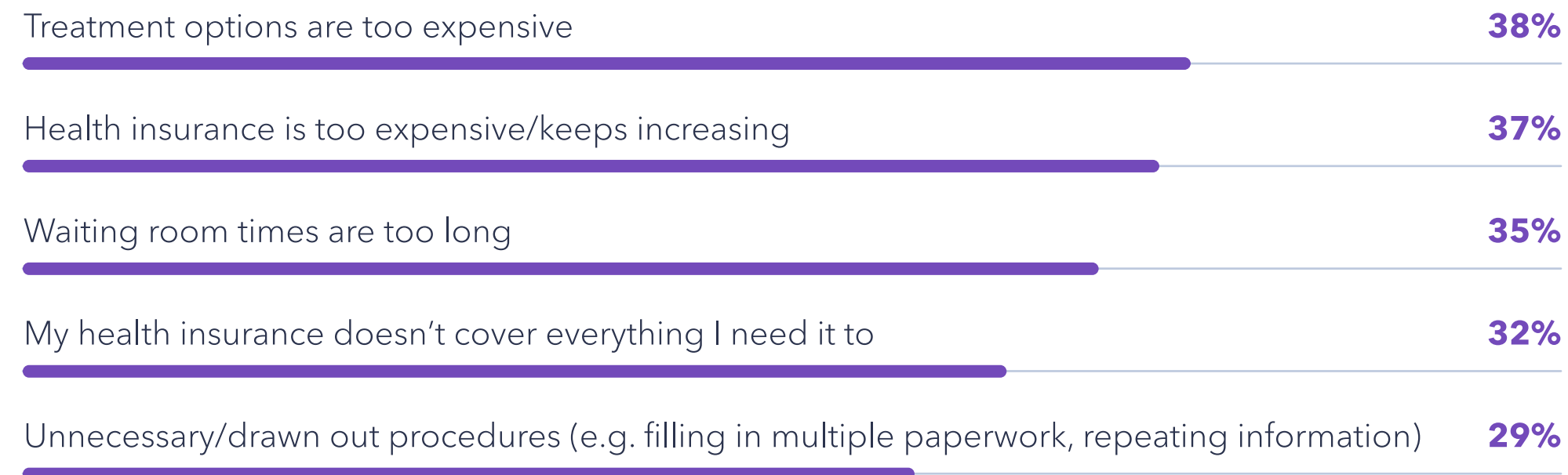
Insurance companies in the U.S. are also following suit. Anthem, one of the largest insurers, is ramping up its telemedicine tool, called **LiveHealth Online**, with a greater volume of physicians and health professionals lined up to manage the influx of patients. To help access, the Trump administration has expanded **telehealth** services for those on Medicare, saying that patients can access any doctor at no additional cost. They will also not enforce **HIPPA penalties** in order to expand care.

# Addressing consumers' healthcare frustrations

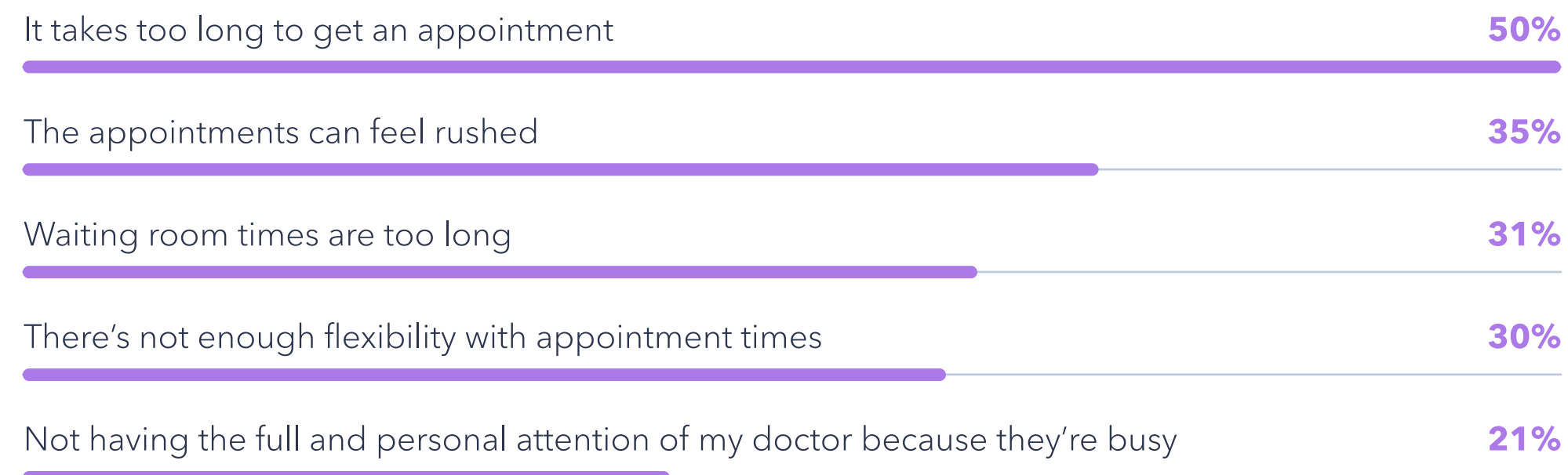
## U.S. HEALTHCARE FRUSTRATIONS ARE PRIMARILY AROUND COSTS, WHILE IN THE UK IT'S WAIT TIMES

% of internet users in the U.S. and UK who say the following are their biggest healthcare frustrations

### U.S.



### UK



As we've mentioned before, digital health services have the potential to alleviate consumers' key frustrations and issues. **In the UK, the major frustration consumers have with their healthcare experience is that it takes too long to get an appointment (49%);** this is largely because most consumers use public healthcare like the NHS, which is under serious pressure.

With digital health services, consumers don't have to wait weeks to get an appointment or spend hours in a waiting room. This also has benefits for the healthcare system more broadly. By handling minor patient issues digitally or by reassuring people who are worried, it helps to free up doctors' time to focus on more urgent cases in-person - such as in the current pandemic. **In the U.S., the biggest frustrations among consumers are expensive treatment options (38%) and the rise in health insurance costs (37%).** Previous research from Gallup found **1 in 4 Americans** have delayed treatment for serious medical conditions in the past year because of costs. Digital services can help reduce these frustrations and offer cost-efficient healthcare that's more accessible for everyone, even those that live in remote locations.

As with everything, digital health services aren't perfect. **One of the potential downsides is it removes the face-to-face, personal interaction a patient has with their doctor.** It's clear from our research consumers' first preference for communicating with their doctor in the future is still in-person rather than phone or video call. Close to 3 in 4 baby boomers say their preferred way of communicating with their doctor is in-person, this decreases to around 3 in 5 Gen Z but it still remains their preferred option. This highlights that even though digital services will become a core part of healthcare moving forward, the human touch can't be replaced.

**Question:** When it comes to your healthcare experience, what are your biggest frustrations, if any? Please select all that apply.  
**Source:** GlobalWebIndex August 2019 **Base:** 2,681 (U.S.) and 2,864 (UK) internet users aged 16-64

# Your AI doctor will see you now

## THE BENEFITS AND DRAWBACKS OF AI IN HEALTHCARE

% of internet users in the U.S. and UK familiar with AI who say the following are the top benefits/challenges of AI applications in healthcare

Ability to detect hidden patterns that humans might miss	51%	Privacy and security concerns	50%
Ability to automate routine tasks to free up staff time	47%	Concern that doctors might become too dependent on them	48%
Reduces the rate of human errors	45%	Concerns with accuracy of AI	47%
Ability to perform procedures with greater precision	44%	The cost of building/maintaining machines is expensive	45%
Ability to offer greater preventative care	42%	The concern it will reduce face-to-face interaction	45%

- Benefits
- Concerns

## Around 3 in 5 consumers agree AI and machine learning will reshape the healthcare environment within the next 10 years

AI is positioned to reshape the healthcare landscape in areas like early diagnosis, automation of tasks, development of new medicines, and precision surgery. To really understand the role of AI in healthcare, we analyzed consumers' perceptions of AI in this space, and what they think the main benefits and challenges are.

**Our research reveals that the perceived benefits of AI among consumers are mainly centered around its ability to offer greater preventative care and generate greater efficiency.** This could prove especially beneficial for countries like the U.S. where **administrative costs** now make up 34% of total healthcare expenditures. While AI has many potential benefits, implementing it also comes with its own set of challenges, and not just from a cost or infrastructural perspective. **For half of consumers, privacy and security issues are their biggest**

**concern overall.** AI and machine learning require huge amounts of data to learn and improve, so ensuring patient privacy is essential. Additionally, close to half of consumers worry doctors might become too dependent on AI and have concerns with its accuracy. Another issue is that the datasets needed tend to be substantial to give a full picture of the person's medical history, and in a lot of cases are separated by hospitals or not integrated together.

Linked to this, consumers' trust in robotics falls short. To test consumers' trust in both AI and robotics, we outlined a thought experiment that said the consumer was due to have a minor surgical procedure and they have two choices of surgeons, a human surgeon or an AI-driven robot. They've heard the AI could perform the surgery more precisely than the human could and we asked

them which they would choose. **We found that 45% of consumers would still choose the human to perform the surgery, while 28% remained unsure.** This demonstrates consumer confidence and understanding of AI in healthcare has a long way to go.

While consumers' concerns with AI are valid, **it's important to note that AI isn't expected to go it alone.** With the appropriate applications across healthcare, AI might have the power to free up doctors' time when it comes to administrative tasks and perform greater precision surgeries, but it will always need some form of human input.

**Question:** What do you think are the potential benefits of AI (Artificial Intelligence) and machine learning applications in healthcare? | What do you think are the potential challenges of AI (Artificial Intelligence) and machine learning applications in healthcare? **Source:** GlobalWebIndex August 2019 **Base:** 1,966 (U.S.) and 2,006 (UK) internet users who are familiar with AI aged 16-64



• TREND IN ACTION •

# AI leads the way in drug development and disease detection



To demonstrate the real impact AI can have in healthcare, imagine this: a drug molecule is invented entirely by artificial intelligence to treat a behavioral disorder, and is able to start human clinical trials in just 12 months - compared to the average of 4 and a half years.

This isn't the future, but instead the reality of a **new drug** developed by UK-based AI firm Exsientia, designed to treat patients with obsessive-compulsive disorder (OCD).

The AI-designed drug has entered human clinical trials in record time, marking a critical milestone for machine learning. On average it costs about \$2.6 billion to develop new treatments using traditional methods, but the use of AI could make discovery of new treatments quicker, cheaper, and more effective.

Meanwhile, Canadian-based AI-startup, BlueDot, **identified** the COVID-19 virus 10 days before the

World Health Organization. The company uses natural-language processing and machine learning techniques to comb through foreign-language news reports, animal and plant disease networks, and official releases, to give clients advanced warnings of possible outbreaks. Epidemiologists then check that the conclusions make sense and the reports are sent to governments and businesses.



# Tech giants get healthy - but there's a trust gap

Globally, two-thirds of internet users are worried about how their personal data is being used by companies - rising to 78% in Latin America and 67% for baby boomers

The biggest players in the healthcare space aren't traditional pharma companies. It's the likes of Google, Amazon, and Apple who are some of the most disruptive challengers.

Google is gearing up to use AI and data to tackle various diseases and illnesses like lung cancer. Amazon is using its ecommerce expertise to disrupt areas like the pharmaceutical supply chain and using its voice-controlled smart speaker Alexa in medical capacities. Meanwhile Apple aims to own the personal health records space using its Health app.

However, these companies have a significant hurdle to overcome: data privacy. The large scale privacy breaches and issues coming to light across a wide number of tech companies haven't gone unnoticed by consumers.

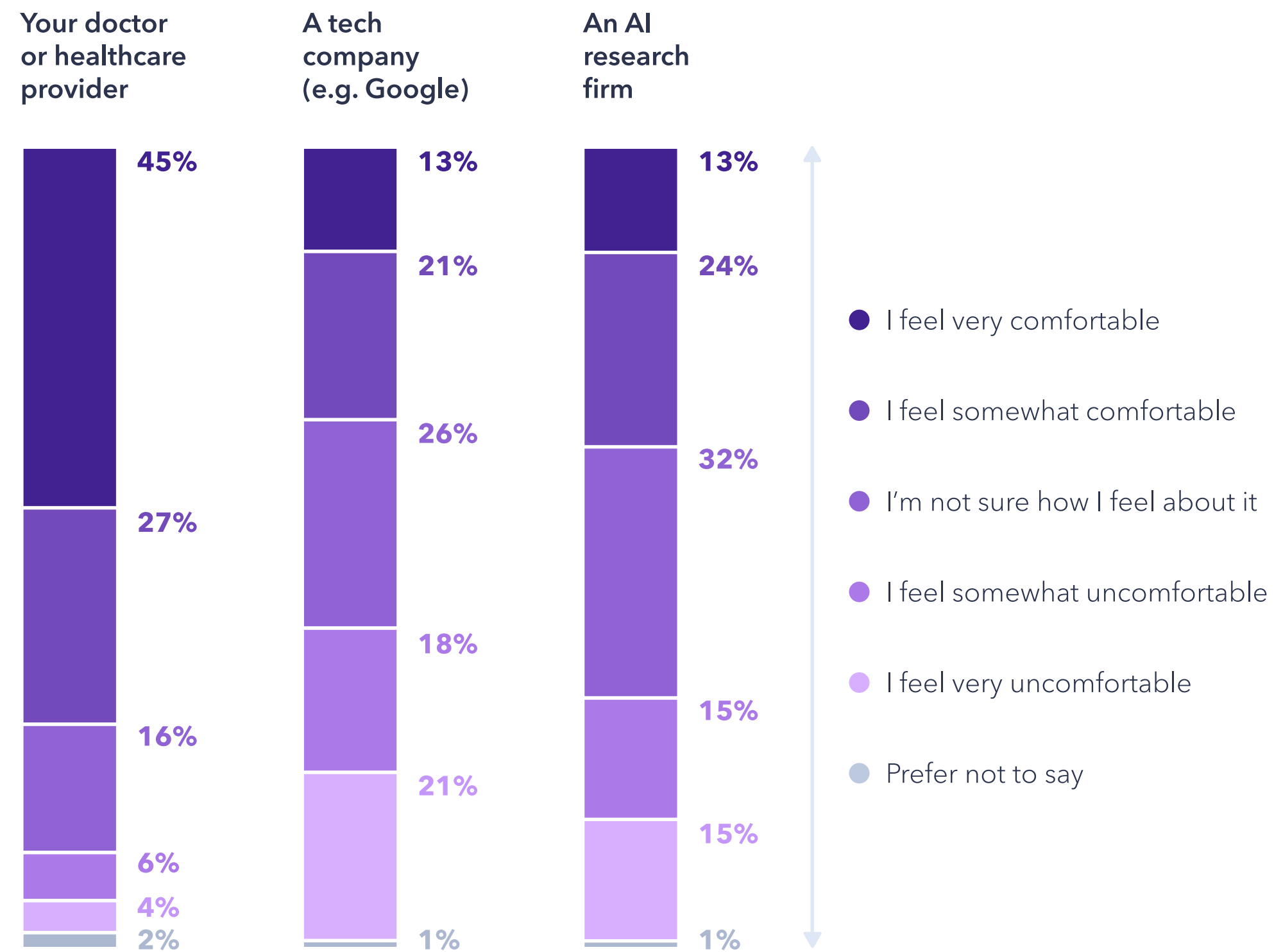
The vast majority of consumers are comfortable sharing their data with their healthcare provider, but this dips significantly

for technology firms. Our research uncovered 39% of consumers don't feel comfortable sharing their health data with technology firms, and a further 26% are unsure how they feel. In fact, consumers are actually more comfortable sharing their data with an AI research firm than a technology firm. Consumers are less likely to be familiar with an AI firm than a well-known tech brand so this highlights a significant trust issue.

So while these companies are making considerable investments in healthcare, the biggest issue will be securing consumer confidence to be able to deliver on their ambitions. We asked consumers in the U.S. and UK what, if anything, would motivate them to share their personal health data and we found consumers would be more motivated to share if they trust that their data won't be shared unnecessarily with others rose to the top (43%), which came ahead of financial rewards (39%). Health data is the new currency for any company or health provider looking to make headway in this industry, so protecting it is fundamental.

## HOW DO CONSUMERS FEEL ABOUT SHARING THEIR HEALTH DATA?

% of internet users in the U.S. and UK who say they feel comfortable/uncomfortable sharing their data with the following companies



**Question:** On a scale of 1-5, how do you feel about sharing your health data with...Your doctor or healthcare provider, A tech company (e.g. Google), An AI research firm **Source:** GlobalWebIndex August 2019 **Base:** 2,681 (U.S.) and 2,864 (UK) internet users aged 16-64

# Notes on methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

## OUR RESEARCH

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 across 46 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

## OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender and education** - meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

## GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2019 wave of research across 46 countries, with a global sample of 173,859 respondents.

Argentina	1,546	Morocco	996
Australia	4,041	Netherlands	1,280
Austria	1,275	New Zealand	1,264
Belgium	1,268	Nigeria	1,037
Brazil	5,635	Philippines	3,077
Canada	4,787	Poland	1,833
China	24,334	Portugal	1,251
Colombia	1,320	Romania	1,304
Denmark	1,262	Russia	3,443
Egypt	1,756	Saudi Arabia	1,493
France	5,013	Singapore	2,763
Germany	5,033	South Africa	1,552
Ghana	951	South Korea	1,275
Hong Kong	1,823	Spain	5,091
India	13,047	Sweden	1,263
Indonesia	5,079	Switzerland	1,281
Ireland	1,277	Taiwan	2,286
Israel	1,314	Thailand	3,824
Italy	5,145	Turkey	2,029
Japan	3,292	UAE	1,733
Kenya	1,043	UK	10,090
Malaysia	1,542	U.S.A.	25,040
Mexico	4,351	Vietnam	2,520

# Notes on methodology

## MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this [document](#).

## INTERNET PENETRATION RATES: GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically. Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

## INTERNET PENETRATION RATES ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, **the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated**. This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

## INTERNET PENETRATION RATES

GlobalWebIndex's  
Forecasts for 2019  
based on 2017 ITU data

Argentina	78%	Morocco	69%
Australia	88%	Netherlands	93%
Austria	88%	New Zealand	93%
Belgium	89%	Nigeria	36%
Brazil	71%	Philippines	64%
Canada	94%	Poland	79%
China	59%	Portugal	78%
Colombia	66%	Romania	72%
Denmark	97%	Russia	80%
Egypt	54%	Saudi Arabia	83%
France	85%	Singapore	85%
Germany	88%	South Africa	62%
Ghana	48%	South Korea	95%
Hong Kong	91%	Spain	87%
India	42%	Sweden	96%
Indonesia	39%	Switzerland	96%
Ireland	87%	Taiwan	83%
Israel	85%	Thailand	58%
Italy	62%	Turkey	71%
Japan	92%	UAE	95%
Kenya	43%	UK	96%
Malaysia	83%	U.S.A.	80%
Mexico	69%	Vietnam	55%



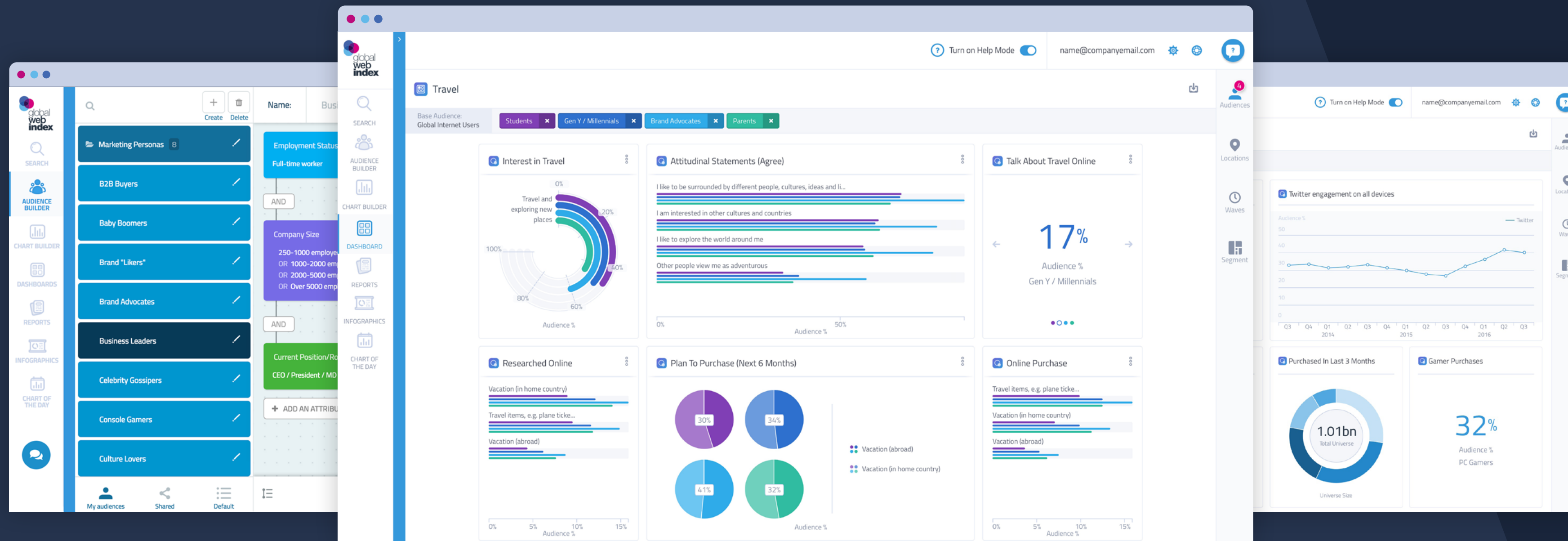


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