

## Health and Technology: Inc Impact of COVID-19 - UK - July 2020

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“Consumer health technology is a rapidly emerging field brought into sharp focus by the COVID-19 pandemic. Apps and services to aid in diets, exercise, mental health and nutrition will help consumers navigate an uncertain and difficult period. Health technology’s longer-term potential is in delivering tools help manage overall health and wellbeing in a proactive, holistic manner.”  
**– Joe Birch, Consumer Technology Analyst**

This report looks at the following areas:

- **The impact of COVID-19 on purchasing and use of health technology products services and apps.**
- **The ways consumers use health technology and how this will change as a result of COVID-19.**
- **Launch activity and innovation from companies innovating in the health technology space.**
- **What future trends in health technology will mean for longer-term developments in the health tech space.**

Consumer health technology is a rapidly growing field brought into sharp focus by the COVID-19 pandemic. Apps and services to aid managing diet and nutrition, exercise, mental health and provide guidance such as symptom trackers will help consumers navigate an uncertain and difficult period in the short term. Growth in wearables such as smart watches and fitness bands, which can play a role in monitoring health data such as blood pressure and heart rate, can be a platform for the wider use of health technology longer term.

Health tech can also help prevent and manage conditions, provide reminders for screening appointments, and be a gateway for information and guidance to navigating health issues and information. It has the potential to deliver tools for consumers to manage the diverse areas and influences that affect overall health and wellbeing in a holistic manner, and act as a steward for all-round health and wellness management.

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### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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### The Impact of COVID-19 on Health and Technology

Short, medium and long-term impact on the industry

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Figure 10: Expected impact of COVID-19 on health and technology, short, medium and long term, [2nd July 2020]

Short term

Medium term

Long term

Opportunities and threats

Consumer health technology can help guide, inform and reassure in the time of COVID-19

Technology can help consumers discover more about healthy eating habits to boost immunity

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Shifts in consumer behaviour

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Impact on key consumer segments

How a COVID-19 recession will reshape the market

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Higher-end health tech device purchases will be stifled in the short term

Higher household incomes and engaged tech savvy younger audiences can maintain the market

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Personal devices to monitor air quality can help consumers manage concerns over effects of pollution

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The implications

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The facts

The implications

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Fem-tech can be a new driver for consumer growth

NHS Apps library offers trusted go-to source for consumers

Investments in mental health tech on the rise

The digital health sector in the UK

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Spike in use of mental health apps in May 2020

## Market Overview

The digital health sector in the UK

Figure 13: turnover for digital health segments within med tech sector, 2018

Health and wellness apps

Figure 14: Top grossing health and fitness apps worldwide, May 2020

Exercise platforms and apps

Wearable technology for tracking activity

Garmin sets the pace in 2003 for the GPS enabled sports watch

Early collaboration between Nike and Apple sets the tone for health and tech crossover

Fitbit enters market with affordable fitness trackers

Pebble watch starts the smartwatch charge

Withings invent the first hybrid smart watch

Samsung Galaxy Gear benefits from early mover advantage

Apple Watch makes timely upgrade to its operating system

Emerging consumer health devices

Self-cleaning water bottles

Portable air quality monitors

Personal monitors for vital signs

At-home DNA testing kits

Paternity tests arrive in the late 1990s

DNA kits to trace ancestry

Direct-to-consumer genetic testing for disease risk

Diet and fitness DNA tests

Next generation sequencing DNA tests

Telemedicine and remote consultation

Babylon Health

Push Doctor

Immedicare

At-home tests lead the proactive health movement

Thrive

Viome

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Privacy concerns and early adopter market saturation posing a problem for genetic testing products

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Google's Fitbit acquisition could accelerate innovation  
 NHS trend towards digitisation of healthcare could open up opportunities for tech providers  
 NHS Apps library offers trusted go-to source for consumers  
 Fem-tech can be a new driver for consumer growth  
 Investments in mental health tech on the rise

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## Companies and Brands – What You Need to Know

Google's Fitbit acquisition could accelerate innovation  
 Amazon to provide NHS health information via Alexa  
 Samsung introduces conceptual devices for assisted living  
 Zwift pioneers innovative approach in lockdown times with virtual professional tie-up  
 Withings adds sleep monitoring to its latest smartwatch  
 Google Glass sees new life in glasses for visually impaired

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CES 2020 sees a move towards holistic health and wellness apps  
 Samsung introduces conceptual devices for assisted living  
 Amazon to provide NHS health information via Alexa  
 Specialist sleep trackers for monitoring shut eye  
 Zwift pioneers innovative approach in lockdown with virtual professional tie-up  
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Google Glass sees new life in glasses for visually impaired  
 Predictive technology aims to recognise signs of health deterioration before it occurs

## The Consumer – What You Need to Know

51% of consumers have ever used a digital health app or service  
 Health and wellbeing apps can be habit forming  
 Barriers to use increase with age  
 Goal-defined targets can drive health and tech use

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Time-saving and transparency are important considerations for consumers

## Use of Digital Health Apps and Services

51% of consumers have ever used a digital health app or service

Younger generations latch onto health and fitness apps

Figure 20: Use of health technology apps and services, March 2020

Social competitiveness drives motivation for personal improvement

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In-home fitness apps and classes can be intimidating for gym novices

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Barriers to use increase with age

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Generation Xers can be nudged towards lifestyle changes

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Gamification of exercise apps can meet current and future needs

Online fitness platforms can be the celebrity fitness DVDs of the 21st century

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Higher-income households see wider range of benefits in health tech

Younger generations can be health-tech evangelists for older generations

High female interest in health tech highlights femtech sector potential

Health tech can help navigate later health issues

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### Consumer Attitudes Towards Health Technology

Time-saving and transparency are important considerations for consumers

Health tech using emerging technologies will need transparency to counter scepticism

Science will need to be failsafe for pre-emptive disease testing tools to win

Health apps and services offer incentives for healthy lifestyles

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