Picture of health
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Introduction

As our population ages, and suffer more chronic and lifestyle-related diseases, the NHS is struggling to increase access and quality of care while more effectively managing escalating costs. At the same time, people are looking to find new ways to take control of their personal health – including ways to be healthy, live well, and to care for themselves and their families at home.

But do people understand how they can help contribute by taking control of their own health?

The Philips picture of health report confirms that the UK population knows that preventing poor health is better than curing poor health. We understand the need for active health management, but despite this, when it comes to our own health, the UK is a nation who at times buries its head in the sand. There's a clear gap between what British adults know they should be doing and what they are actually doing.

The report combines our own online survey of 2,000 UK adults and 400 Healthcare Professionals (HCPs), mobile ethnographic research with 20 adults across the UK, and existing secondary sources and studies to understand the attitudes and behaviours that are impacting our nation’s health, now and in the future.

At Philips, we want people to be healthy, live well and enjoy life. We are a technology company that cares about people and their health. We have operated in the healthcare sector for 100 years and our mission is to improve the lives of 3 billion people a year by 2025.

Our focus is on keeping people healthy for as long as possible and on being there every step of the way when they’re not. We want to motivate people to monitor and manage their health and believe healthcare should be provided as a seamless service between the home, hospitals and medical professionals. For us it’s about seeing the bigger picture of health, it’s about offering truly connected care.

Philips is uniquely positioned to deliver connected care. It is the only health technology company with a range of professional and consumer offerings that can combine clinical and personal health data across the continuum to encourage prevention and healthy living, to speed diagnosis and treatment, and to enable better home care. We're combining our deep clinical knowhow and healthcare expertise, developing these health programmes with leading doctors and psychologists for better patient outcomes.

So, is prevention itself in a critical condition? Yes, but there's a glimmer of hope at the end of the prevention tunnel. We believe we can break free from the inertia of inaction by connecting consumers and professionals with accurate and personalised health data. This, combined with solutions that keep healthy people well longer and aiding people to manage health at home, is the key to a hearty and better future for us all.

All of us have a role to play in helping to keep the nation healthy. At Philips, we look forward to building that future together.

- Sean Hughes, Vice President, Philips Design
Chapter 1

An apple a day... is prevention itself in a critical condition?

On its own, knowing what we should be doing to manage our health isn’t always enough to get us to do something about it.

The benefits of prevention have long been recognised – the Hippocratic Oath, written in the 6th Century committed doctors to, “prevent disease whenever I can, for prevention is preferable to cure.” Having grown up with truisms such as, “an apple a day keeps the doctor away” and “prevention is better than cure”, society is well aware of the need to actively manage its health.

Yet, in the UK, the NHS faces a myriad of macro health challenges, including the rise in lifestyle-related conditions and a rapidly growing population.

Less Than Half of Britons Actively Manage Their Health

- 45% I actively manage my health
- 26% I know I should be more proactive in managing my health, but I don’t have the time
- 21% I know I should be more proactive in managing my health, but I don’t have a strong desire to do so
- 8% I don’t actively manage my health
This need for change is apparent to most British adults: Four out of five agree that prevention is better than cure (80%), and that establishing good habits is key to combating poor health in the future (76%). On its own, this belief doesn’t always translate to action.

Less than half (45%) of British adults say they are actively managing their health. For those who aren’t active in personal health management, a quarter (26%) know they should be more active but don’t have the time; one in five (21%) know they should be more active but don’t have a strong desire to do so and 8 percent admit they just don’t do it.

That means nearly a third of British adults (29%) don’t have an interest in changing their behaviour – even if it’s for the good of their own health. The long-term effects of this approach to health management are clear – for how much longer can we justify inaction?

“I hate [maintaining a healthy lifestyle]. It’s tedious, it goes on a bit. I’d prefer if exercise was easy, then I’d be able to do it all the time.”
- Kyle, Nottingham

Despite knowing the need exists for better patient education around taking steps to prevent poor health, HCPs see a discrepancy between the time they should spend discussing prevention during appointments and the time they normally spend doing so.

While it can be assumed that there are a number of factors influencing this disconnect, it’s worth noting that lack of time is chief among them. According to the NHS, the average doctor’s appointment lasts eight to ten minutes¹ – a tight timeframe for a patient to describe symptoms and for an HCP to process and assess that information, ask follow-up questions, and determine the correct course of action (which in many cases could be a cure [prescription] or specialist referral).

35% of HCPs say the majority of their time during patient appointments is spent discussing cure. However, more than half (59%) believe these appointments should be more focused on prevention.
‘Ostrich syndrome’

In general, British adults have a reactive outlook on making meaningful lifestyle changes—physical symptoms (71%) or a warning from their doctor (69%) are what would most prompt them to make a change to their lifestyle. Very few are motivated by others—only 22 percent say seeing a friend or family member experience a health problem would prompt them to change their behaviours, and only 11 percent would be inspired to change after seeing a friend or family member take charge of their health.

Research published by the New England Journal of Medicine reveals that obesity can actually spread among groups of friends—when one of our friends becomes obese it increases our chances of becoming obese by 57 percent, suggesting that unhealthy habits can become contagious. If we view our health against our peers, do we become more comfortable in our inaction?

Most British adults admit to taking the path of least resistance—using scales to weigh themselves is the top method British adults use to track and manage their health (42%), followed by visiting or relying on the doctor (32%) or dentist (26%). The younger generation is more likely to connect with family and friends, both online and offline, and use connected devices to help with tracking and managing their health. In fact, those aged 18-24 are just as likely to use social and “connected” outlets to assist with health management as they are to visit a professional (see graph below).

“I find my whole body helps me gauge my overall health. For example, if my knees are aching or I’m feeling withdrawn and down or feeling a bit thirsty, that’s my body’s indication that I need to make sure I do some exercise.”
- David, Manchester

74% of Britons use some method to track and manage their health

- Weighing myself on the scale: 42%
- Visits to the doctor / the doctor tracks it: 32%
- Visits to the dentist / the dentist tracks it: 26%
- I don’t track my health in any way: 26%
- Talking about it with family/friends: 17%
- Connected device (e.g. wearable tech, smartphone or app): 9%
- Via a website: 9%
- In a journal/diary: 9%
- On social media: 6%
In addition to managing their health reactively, British adults also admit to relying on gut instinct — 44 percent say trusting their gut is how they understand their health. While over half (56%) refer to their weight as an indicator of overall health, UK adults also rely on subjective indicators, such as their general feeling of well-being (64%), how they are sleeping (44%), and their fitness levels (41%). Other, more objective indicators, such as blood pressure (34%), body mass index (19%), and body fat percentage (13%) are used less frequently.

Perhaps it’s no wonder then that HCPs have little confidence in their patients’ ability to manage their health effectively—just 19 percent are confident in their patients’ abilities to do so.

The answer, HCPs believe, is for patients to have a stronger belief that they can achieve their goals (60%), consistent information and advice from health professionals and experts (61%), and guidance on how to put information into practice (55%). This need for consistent advice and guidance is more strongly felt among the Secondary HCP audience (65% and 61% respectively) [and by secondary HCP, we are referring to health care specialists who typically see patients following a referral from a primary care provider]. Perhaps this points, again, to the need for HCPs to have more time in the consulting room for health management discussions?

“Our research shows that individuals understand the need for prevention and HCPs believe that they need a helping hand to get there so who is responsible for prompting individuals into action and taking prevention out of its critical condition and into recovery?”

- Sean Hughes, Vice President, Philips Design
Chapter 2

Our health: who cares?

With major NHS challenges looming, the need for translating a sense of responsibility into individual action is critical.

Interestingly, the research shows that people have a strong sense of individual responsibility when it comes to managing and preventing poor health. They understand that society is heading in an unhealthy direction but, at the same time, they don’t want the government to legislate to improve health.

Specifically, 87 percent of people and 94 percent of HCPs believe that individuals bear the brunt of the responsibility for preventing poor health. However, there’s an obvious disconnect as four out of five British adults (80%) believe that society is becoming less healthy and 65 percent believe that society as a whole doesn’t seem to take responsibility for its health.

HCPs agree about society’s health track—three out of four (76%) believe the UK is becoming less healthy. Backing this up is the fact that the UK is on track to double its proportion of obese adults from about 25 percent to over 50 percent by 2050.

What’s more, the proportion of obese children could increase from 15 percent to 25 percent in the same timeframe. The majority of UK adults (78%) and HCPs (93%) are in agreement on the importance of parental responsibility in shaping the health of their children.

NHS England’s CEO, Simon Stevens, has issued a stark warning, “Obesity is the new smoking, and it represents a slow-motion car crash in terms of avoidable illness and rising health care costs. If, as a nation, we keep piling on the pounds around the waistline, we’ll be piling on the pounds in terms of future taxes needed just to keep the NHS afloat.”
public and private institutions to prevent poor health in society.

About half (48%) believe corporations, such as the food & drink industry, bear responsibility. On a par with corporations is the NHS (46%), followed by educators (39%). One in three (32%) see the media bearing responsibility for preventing poor health in the UK, and one in five (22%) see their employers doing so.

Those who see the most potential for a collaborative approach to improving society’s health are Millennials. Millennials (specifically those aged 25-34) have the broadest sense of shared responsibility. Compared with British adults in general, Millennials are much more likely to see government, educators, employers, media and charities all playing an active role in managing public health (see table below).

Indeed, half of these Millennials (50%) believe that the government should legislate for better health. However, this is in contrast with the majority of adults. Just over a third (37%) believe the government should legislate for better health. Compare this with HCPs who believe that the government should legislate for better health (64% of Primary HCPs and 55% of Secondary HCPs). Perhaps this is due to the lack of confidence (highlighted in Chapter 1) that HCPs have in their patients’ ability to manage their health?

Further evidence of this lack of confidence is demonstrated by the fact that while HCPs strongly believe that individuals taking more responsibility will help to meet the challenges faced by the NHS, they are exploring alternative routes. These include experimental taxes on sugary soft drinks and bans on TV ads for certain types of foods.

“To the question of ‘who cares?’ a collaborative approach is needed. At Philips, we believe in empowering individuals to actively manage their health and that’s what is driving our health innovations,” - Sean Hughes, Vice President, Philips Design

HCPs believe in a multi-stakeholder effort that combines personal responsibility and technology to meet some of Britain’s greatest healthcare challenges.

For HCPs, the top-three challenges facing the NHS are the ageing population (70%), being able to deliver high-quality services within financial constraints (68%), and the impact of obesity (58%).

Primary and Secondary HCPs have several things they’d like to see happen to best meet these challenges. Specifically:
1. Individuals making meaningful lifestyle changes (77%)

Which of the following bodies should take responsibility when it comes to preventing people’s poor health?

<table>
<thead>
<tr>
<th></th>
<th>Individuals</th>
<th>Parents</th>
<th>Doctors</th>
<th>NHS</th>
<th>Educators</th>
<th>Employers</th>
<th>Local government</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals</td>
<td>87%</td>
<td>78%</td>
<td>63%</td>
<td>46%</td>
<td>39%</td>
<td>22%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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2. HCPs to stress the importance of prevention (69%) and follow-up with patients about meaningful lifestyle changes (68%)

3. Technology companies to create solutions that allow primary and secondary HCPs to be better connected (54%) and ensure that health data is being used to improve outcomes for patients (51%)

With a growing number of people utilising technology for personal health tracking (the UK health and fitness wearable tech market will rise to an estimated 13.1m users this year 3), it is clear there’s an essential role for technology companies to play. Currently, only one in ten HCPs (9%) believe that patient data is effectively connected and shared within the healthcare system, and nearly all (96%) say patient data could be better connected.

HCPs believe that improving the connection between patient data and treatment would lead to better patient outcomes (75%), cost savings (43%), and reduced administration time (33%). From a secondary care perspective, about two-thirds (63%) say better connected and shared data within the system would lead to better treatment collaboration between professionals and patients.

Ultimately, HCPs and consumers see the individual taking the lead on preventing poor health, but autonomy isn’t working so perhaps that’s why both groups see the role for shared responsibility. To understand how individuals approach health management, we must first understand where their knowledge comes from.
Consumers believe personalised care would help them better manage their health

Whether it stems from an interest in managing their health or a need to, British people have a hunger for health information. They are digesting information from a wide range of sources – three out of four (75%) have gathered information about health and wellness from more than one source in the last year, primarily consulting health-related websites (26%), medical professionals (38%), search engines (27%), and food packaging (22%).

As you might expect, Millennials are more likely than the majority of adults to use search engines, websites, and social media channels as their main information sources. Having this information at their fingertips means Millennials are more likely to consult a search engine than a health professional as a health information source – in stark contrast to older British adults who, without question, consult the doctor most (see table below).

Of those British adults who are turning to social media channels for health information, many consult those channels at least once a week – Twitter (69%), Facebook (68%), YouTube (56%), and blogs (53%).

**Top sources used to gather info on health & wellness**

- **38%** Doctor/nurse/pharmacist/other medical professional
- **27%** Search engine e.g. Google, Bing, Yahoo, etc.
- **26%** Health-related website
- **22%** Food packaging
- **18%** Family
Despite the use of multi-channels for gathering health and wellness information, the channels that British adults trust the most (among those who use them), are Healthcare Professionals (44%) and health-related websites (17%). Trust in professionals increases with age (24% of 18-24 year-olds trust HCPs most versus 73% of those aged 65+), while trust in health-related websites peaks among 35–44 and 45–54 year-olds (see table below).

Patient reliance on digital media for health and wellness information presents a problem for HCPs with over a third (41%) saying that patients turning to the Internet for health information is making their job more complicated. The rise in ‘Dr Google’, patients diagnosing themselves online, can hamper clinical decision making as generic health information can be a barrier to the doctor learning about the individual6.

Patients and doctors don’t see eye-to-eye when it comes to patients’ perceived knowledge of general health topics.

The health and wellness topics British adults claim to have the highest level of knowledge around include recommended fruit and vegetable intake (77%), frequency of dentist visits (74%), how much sleep they should get (68%), and recommended daily alcohol intake (63%).

The high level of perceived knowledge individuals think they possess is not a perception shared by HCPs, who have much less faith in patient reported knowledge than the patients.
themselves. In fact, on average the gap between what British adults think they know and what HCPs say their patients know is 28 points, with the biggest gap occurring when it comes to what constitutes a healthy sleep pattern, and how often to go to the dentist (see table below).

Confusion and confidence

Part of the problem is that whilst people believe themselves to be well informed they also admit to being confused. In the last year, 72 percent of British adults say they have come across a wide variety of health topics, most often related to eating and exercise. Among these adults, about half (53%) found the information confusing. They are most often confused by which diet is best for them (47%), what types of fats to consume (45%), and what type of carbohydrates they should consume (44%). The root cause of confusion for all of these topics is the conflicting information available.

Perhaps, in some cases, the confusion felt leads to a lack of confidence. The younger groups have the least amount of confidence in their ability to effectively manage their health compared to the nation as a whole. Less than half (47%) of those aged 18-24 say they are confident in their ability to manage their health effectively, compared to two-thirds (66%) of those aged 65 and older (and 59% overall).

Despite most often consulting the internet for health information, younger British adults feel that their confidence in health management would be boosted by personalised care - support from a health, nutrition or fitness expert (36%), consistent information and advice from professionals and experts (33%), guidance on how to put information into practice (30%) and personalised consultations and treatments from their doctor (28%).

In contrast to the UK’s Millennials, who are still building their health management confidence, Boomers appear bullish in their self-assessment and perception of their health management capabilities. The 65+ group is least concerned about their current state of health (48%), and are the demographic with the largest percentage who say they actively manage their health (63% versus

<table>
<thead>
<tr>
<th>What constitutes a healthy sleep pattern</th>
<th>British adults 68%</th>
<th>HCPs 28%</th>
<th>Perception gap -40%</th>
</tr>
</thead>
<tbody>
<tr>
<td>How often to go to the dentist</td>
<td>74% 35%</td>
<td>-39%</td>
<td></td>
</tr>
<tr>
<td>Recommended daily calorie intake</td>
<td>54% 22%</td>
<td>-32%</td>
<td></td>
</tr>
<tr>
<td>The right weight</td>
<td>62% 30%</td>
<td>-32%</td>
<td></td>
</tr>
<tr>
<td>Recommended daily alcohol intake</td>
<td>63% 31%</td>
<td>-32%</td>
<td></td>
</tr>
<tr>
<td>Recommended daily exercise</td>
<td>58% 28%</td>
<td>-30%</td>
<td></td>
</tr>
<tr>
<td>Recommended daily fruit/veg intake</td>
<td>77% 49%</td>
<td>-28%</td>
<td></td>
</tr>
<tr>
<td>Recommended daily fat intake</td>
<td>38% 13%</td>
<td>-25%</td>
<td></td>
</tr>
<tr>
<td>How to manage stress levels</td>
<td>45% 20%</td>
<td>-25%</td>
<td></td>
</tr>
<tr>
<td>Blood pressure is at a healthy level</td>
<td>57% 35%</td>
<td>-22%</td>
<td></td>
</tr>
<tr>
<td>How often to go to the doctor</td>
<td>48% 28%</td>
<td>-20%</td>
<td></td>
</tr>
<tr>
<td>The right Body Mass Index (BMI)</td>
<td>46% 28%</td>
<td>-18%</td>
<td></td>
</tr>
<tr>
<td>Family history of health problems</td>
<td>61% 45%</td>
<td>-16%</td>
<td></td>
</tr>
</tbody>
</table>
an average of 45%), as well as the most confident in their ability to manage their health (66% versus an average of 59%).

But is the older generation overconfident? Their health management approach tends to be reactive rather than proactive—most track and manage their health by weighing themselves (53%), visiting the doctor (50%), or visiting the dentist (39%). While they do visit the doctor, they are also more likely to rely on their gut instinct to provide an understanding of their health (49%), and need prompting to make meaningful change to their lifestyle—81 percent would make a change at the sight of physical symptoms, but an equal number would require a warning from their doctor (80%).

Despite, or because of, all the information being consumed, there’s a gap between how knowledgeable people believe themselves to be and how knowledgeable they are. Confusion reigns. Generally, doctors continue to be presented with subjective indicators of health instead of evidence. What if the information prescription is wrong and the cure is health data?

Older Brits take a reactive health management approach

The majority of Boomers would only make a lifestyle change at the onset of physical symptoms or a warning from their doctor.
Chapter 4

The power of personalised health data

Harnessing the potential of health data could lead to better outcomes for society

The good news on the horizon is that one in ten people (9%) say they track and manage their health with a connected device (e.g. wearable tech, smartphone or app). Women (11%) are slightly more likely than men (7%) to use connected devices for this purpose; younger adults, ages 18-24, are twice as likely as the rest of the country to make use of a connected device to track and manage their health (19%), which is on par with the percentage of Millennials who visit/rely on their doctor to track and manage their health (22%).

Among those who use a connected device for tracking and managing their health, two fifths (39%) have actually shared that health data with an HCP.

“The information I gather from my run (using an app) has improved my sense of well-being. In the past, before I used the app, I just used to sort of say ‘well, I’m going to run this distance’. But actually seeing the distance I’m covering spurs me to continue doing what I’m doing. It’s having an impact on my health, because I’m feeling good about myself and setting myself mini challenges.”
- Natalie, London

Percentage of Brits using a connected device to track health

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>19%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>14%</td>
</tr>
<tr>
<td>35-44</td>
<td>10%</td>
</tr>
<tr>
<td>45-54</td>
<td>7%</td>
</tr>
<tr>
<td>55-64</td>
<td>5%</td>
</tr>
<tr>
<td>65+</td>
<td>3%</td>
</tr>
</tbody>
</table>

The vast majority who use a connected device to track and manage health (88%) say that doing so has helped them change habits, most often increasing their exercise (41%), managing their weight (25%), changing sleep habits (23%) and
reducing their sugar intake (21%). In fact, 45 percent of people would monitor their blood pressure regularly if there were a non-intrusive device that automatically did so, demonstrating that the desire for this type of tracking and realisation of the benefits it could reap are already on people’s minds.

While those who use a connected device are primarily using it to track weight (52%), exercise (52%), steps (47%), calorie intake (32%), sleep (31%), and their heart rate (31%), they are significantly more likely than UK adults in general to believe that technology has helped them improve their health—69 percent versus an average of 27 percent. These connected individuals are also more likely to rate their overall health positively—60 percent say they have a good state of health, compared to 54 percent of people in general. In addition, this group is 20 percent more likely to say they actively manage their health (55% vs. 45% of the general population in the UK).

An emerging group of people are using health tracking to practice self-care.

Knowledge is power for many Britons, as seven out of 10 who are using a connected device to track and manage their health (71%) believe that tracking their health information has empowered them to take control of their health. Additionally, 57 percent of these British adults believe their health has improved since they started tracking their health information; and 66 percent say that tracking their health information has made them curious about health overall.

The benefit of connected devices is that the health data they provide is based on the individual, is personalised and consistent. These factors align closely with what British adults say would help them become more confident in their ability to manage their health effectively: One in three (30%) say consistent information

<table>
<thead>
<tr>
<th>Habit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased exercise</td>
<td>41%</td>
</tr>
<tr>
<td>Managed weight</td>
<td>25%</td>
</tr>
<tr>
<td>Changed sleep habits</td>
<td>23%</td>
</tr>
<tr>
<td>Reduced sugar intake</td>
<td>21%</td>
</tr>
<tr>
<td>Reduced overall calorie intake</td>
<td>17%</td>
</tr>
<tr>
<td>Reduced fat intake</td>
<td>15%</td>
</tr>
<tr>
<td>Bought a fitness tracker</td>
<td>15%</td>
</tr>
<tr>
<td>Reduced carbohydrate intake</td>
<td>12%</td>
</tr>
<tr>
<td>Reduced alcohol intake</td>
<td>12%</td>
</tr>
<tr>
<td>Signed up for a gym</td>
<td>12%</td>
</tr>
<tr>
<td>Bought a heart rate monitor</td>
<td>6%</td>
</tr>
<tr>
<td>Quit smoking</td>
<td>6%</td>
</tr>
<tr>
<td>Gone to the doctor more</td>
<td>5%</td>
</tr>
<tr>
<td>Gone to the doctor less</td>
<td>2%</td>
</tr>
</tbody>
</table>

Healthcare Professionals believe their patients are most honest about their overall **well-being (52%)** and their **stress levels (46%)**, but aren’t as forthcoming during appointments about how much they exercise **(26%)**, their **diet (14%)** and **alcohol intake (9%)**.
and advice from experts, along with better access to health facilities, would make them more confident when it comes to their health. They would also benefit from support (27%) and guidance on how to put information into practice (25%) – which is where technology companies and HCPs can join the dots.

“I think [the devices] give you knowledge you might not necessarily have come across elsewhere. It gives you a comprehensive breakdown, and it’s personalised. They make information all the more accessible, all in one place, so you’re not having to go to different sources.”
- Jennifer, Manchester

The patient/professional data exchange, while not largely tapped by both parties yet, has the potential to improve efficiency and efficacy when it comes to treatment and personalised health recommendations.

Two thirds of HCPs (67%) say at least some of their patients share health data from their connected devices (e.g. wearables, smartphone or app), though incidence of this data sharing is still relatively low—52 percent report that one in four of their patients share data during appointments. Meanwhile, two out of five connected adults share the health information they track with their healthcare provider.

HCPs believe patients who share health data are more motivated to adhere to their treatments (55%) and more likely to adhere to their advice (41%). They report observing psychological benefits among patients who share health data.

### Tracked data shared by patients (according to HCPs)

<table>
<thead>
<tr>
<th></th>
<th>Primary HCPs</th>
<th>Secondary HCPs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blood pressure</td>
<td>58%</td>
<td>24%</td>
</tr>
<tr>
<td>Blood sugar</td>
<td>39%</td>
<td>25%</td>
</tr>
<tr>
<td>Weight</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>Exercise</td>
<td>39%</td>
<td>37%</td>
</tr>
<tr>
<td>Heart rate</td>
<td>35%</td>
<td>22%</td>
</tr>
<tr>
<td>Steps</td>
<td>28%</td>
<td>40%</td>
</tr>
<tr>
<td>Body fat / BMI</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Calorie intake</td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
<td>Alcohol units consumed</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Sleep</td>
<td>11%</td>
<td>13%</td>
</tr>
</tbody>
</table>

In addition, HCPs say that data-sharing by patients has increased their patients’ belief they can achieve their goals (39%).

The data exchange has had an impact on the professionals—36 percent of HCPs say they have gained more insight into their patients’ health and one in four (28%) have been able to offer more personalised health advice. From a Secondary HCP’s point of view, one in three (30%) have been able to give their patients measureable goals to work towards, allowing everyone to track performance and progress, giving important feedback that can impact and improve patients’ health before it becomes a problem.

In terms of how the data patients have shared has been used, half of HCPs (52%) report that the data has been used during follow-up appointments / consultations, while 37 percent have used patient information in the surgery. One in four (26%) have used the data during their first appointment or consultation.

Underlining its importance, HCPs believe that access to health data is a patient right—62 percent of Primary HCPs and 69 percent of Secondary HCPs believe patients should have access to more personal health data. HCPs
believe that being given this access would increase patients’ sense of responsibility for their health (55%) – and the NHS agrees.

Acknowledging the importance of and potential for such an improvement, Health Secretary Jeremy Hunt launched a bid to make the NHS a world leader in digital patient care, pledging that all patients would be able to access their medical records online by 2018. Hunt advocates that such access causes health improvements to be ‘a shared endeavour, a shared responsibility’, and that ‘the world’s most powerful patients become the world’s healthiest patients.’

As a step in this direction, doctors and medical professionals will need to work directly with their patients to ensure they are providing the right kind of data to their doctors, reading their medical records correctly, and developing specific plans with their doctors to improve their health – thereby increasing their confidence to manage their health, anticipate issues before they become serious, and allow patients to proactively manage their health into the future.

45% of HCPs agree that getting access to the health information that patients track would help create better treatment programmes

The NHS is keen to harness patient health information and use it for something that can actually help to predict—and therefore prevent—illnesses, saving time and money and improving efficiencies for patients, doctors, and the NHS itself. The NHS’s desire to “safely harness” technology and information will enable and empower people and HCPs to make the best health and care choices possible for them.

Looking at how personal data has been applied across other industries, it is clear that data and technology can help close the health and wellbeing gap, the care and quality gap, and the funding and efficiency gap.
We all fall victim to over-optimism, especially when it comes to planning for the future. It’s near impossible for us to imagine a time where our health will fail and we will need to rely on others for care. That won’t happen to me, we confidently say to ourselves. Of course, when we take a step back, we all recognise the fallacy of this belief and know there is a need for us to take control in order to live well for longer. But knowing what we should do does not always mean we do it.

The Philips picture of health report shows that UK adults and HCPs alike agree that preventing poor health comes down to the individual taking responsibility for their health (87% and 94%, respectively). But with less than half of UK adults currently actively managing their health, there is a clear disconnect between believing they have responsibility for their health and taking action.

The need to translate a sense of responsibility into responsible actions is more important than ever

Chronic and lifestyle-related disease are on the rise and our population is living longer with these conditions putting immense pressure on the NHS to increase access to quality of care while more effectively managing costs. According the HCPs, the top challenges facing the NHS are an ageing population (70%), its ability to deliver quality care within financial constraints (68%), and the impact of obesity (58%).

Compounding these challenges are the beliefs among both adults and HCPs that our nation—despite its hyper-focus on health, wellness and nutrition—is in fact becoming less healthy (80% and 76%, respectively). Without active health management, not only is there no way for our current state of health to improve, but we may be setting ourselves up for disastrous results down the line. The time to act is now.

Personalised care can improve health

To break through the health information noise, consumers want personalised care and data that is easy to understand, and verify, to help them better manage their health.

Three out of four (72%) have consumed health and wellness information in the last year from a variety of sources while on the hunt for specific health-related topics. Among those Britons, more than half (52%) found that information confusing mainly because there is too much conflicting advice on the same topic.

This data highlights both sides of the information coin—as a nation we are more interested than ever in our health and how to manage it, but this interest and access to lots of general information doesn’t necessarily lead to better decision-making. In fact, more than a third (41%) of HCPs say that patients’ reliance on the Internet for health information is making their job more complicated.

Harnessing the potential of the doctor-patient data exchange could lead to improved health outcomes for society

There is an emerging group of people who are using the latest technologies and health data to actively manage their health, and they report
seeing improvements to their health and habits as a result. One in 10 (9%) British adults say they are currently tracking their health via a connected device, such as wearable technology, their smartphone, or other application. Of those using a connected device to track and manage their health, a staggering 88% say it has led to a positive change of habit.

In addition, HCPs say they value the additional insights that patients are able to provide with connected data. This is because, unlike information consumers find using “Dr Google”, data collected by connected devices is personal, accurate and actionable. Indeed, HCPs have already begun to observe the positive impact of connected and personalised health data—more than half (55%) believe patients who share health data are more motivated to adhere to their treatments and follow their advice (41%). What’s more, a third (36%) have gained invaluable insight into their patients’ health, while one in four (28%) are able offer more personalised advice.

It’s within this convergence of prevention, personalised care, and power of personalised data that we believe a better and healthier future exists.

This is the era of connected care – enabling individuals and HCPs to unleash the power of health data from wearable devices, electronic medical records, diagnostic and treatment information, images, reports and notes. Philips is innovating to deliver connected care solutions that encourage healthy living, health management, speed diagnosis and treatment and enable better home care, ultimately leading to improved health habits and outcomes.

Together, we can make the nation a picture of health.
The data, findings and insights in this report are based on a combination of primary and secondary research. To gain a fresh perspective on health in the UK, we conducted an online survey using the field services of Norstat, a full-service data collection agency, between 18–26 August, 2015. The study reached a random and representative sample of 2,002 adults from the United Kingdom, as well as a random sample of 402 primary and secondary healthcare professionals (HCPs).

In addition, we partnered with Kiosk, a mobile ethnographic research company, and conducted a series of qualitative research tasks with 20 adults in the UK using its Field Notes application. Field Notes is a mobile research app that allows recruited community members to respond to questions, complete tasks, and create video / photo content and diaries. Tasks and content were analysed to gain contextualised insights into healthy mind-set of UK adults.

For the survey, the margin of error for the consumer sample is +/- 3.1% at the 95% confidence level, and for the HCPs is +/- 5.1% at the 95% confidence level. This means that if we were to replicate the study, we would expect to get the same results (within 3.1 percentage points) 95 times out of 100.

Sample Breakdown:

<table>
<thead>
<tr>
<th>Total Sample n=2,404</th>
<th>Audience Total Surveyed</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK Adults n=201</td>
<td></td>
</tr>
<tr>
<td>Secondary HCPs n=201</td>
<td></td>
</tr>
</tbody>
</table>

We also gathered trend analyses, news and reports from a variety of existing sources to understand consumers’ and HCPs’ perceptions and attitudes towards health management. Specific sources are cited throughout the report.
Endnotes
1. Your choices in the NHS (http://www.nhs.uk/choiceintheNHS/Yourchoices/GPchoice/Pages/GPappointments.aspx)
5. Kantar Media futurePROOF report, October 2014
6. Time.com, 10 Sept 2015 (http://time.com/4025756/google-health-issues-doctor/)
7. Future Foundation, nVision Research, GB 2012