

Think with Google

mtm

Health & Wellness Apps: Winning Hearts and Minds of consumers

The critical importance of apps in driving
positive behavior change



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Executive Summary

Apps have never been more important in the Health & Wellness sector, and here at Google we recognise the unique opportunities faced by brands looking to build and strengthen their presence in this new and challenging space.

This research addresses that need by looking at why apps are so vitally important for Health & Wellness businesses; how apps can drive commercial and non-commercial KPIs; and what developers should focus on to achieve tangible improvements in their app offering. We'll also explore the fundamental ingredients that make a great app; reveal the often-complex journeys that users take when searching for and using an app; and how this can help you plan and shape your own app strategies.

The research also identifies developer do's and don'ts at each stage of the app user journey, and reveals the benefits that can be gained from delivering compelling and engaging app experiences for both businesses and end users.

This model consists of four key stages:

- 1. DISCOVER** - when users first find your app and download it
- 2. ONBOARD** - the process of first use and registration
- 3. ENGAGE** - when users start using the app more regularly
- 4. EMBED** - the ideal end state, when users classify the app as 'vital' to their lives. Only a small proportion of users typically reach this stage with any given app, but there are steps you can take to give your app the best possible chance of success.

Of all the stages within the journey, **EMBED** is certainly one of the most insightful. Our research shows that users who reach this point say their Health & Wellness app is a vital part of their lives – and something they “don't know what they'd do without.”

In fact, this group over-indexes on all engagement and financial KPIs for Health & Wellness businesses, including Daily Active Users (DAUs); frequency of daily use; average number of use cases; and (perhaps most importantly) claimed spend. In all four of these categories, there is a significant uplift among **EMBED** users – with the highest increase in Daily Active Users (+63%); frequency of daily use (+39%); average number of different activities completed in the app (+33%); and claimed spend on subscription or downloading the app or content (+66%).¹

In summary then, there are undoubtedly clear and demonstrable benefits to creating an app that users see as 'vital'. We hope this report serves as a useful roadmap for developers looking to achieve this critical – and potentially lucrative – stage.

01

CONTEXT: Winning Apps

Recognising the fact that, for users, finding the 'right' app can often be a complex and drawn out event – and a process which many brands struggle to fully understand – Google had the ambition to support its clients in formulating their app strategies.

Google developed a new model that maps the journeys people take when searching for (and using) an app. It also identifies the critical do's and don'ts at each stage, and highlights how and why Health & Wellness app developers must deliver compelling and engaging experiences for businesses and end users.

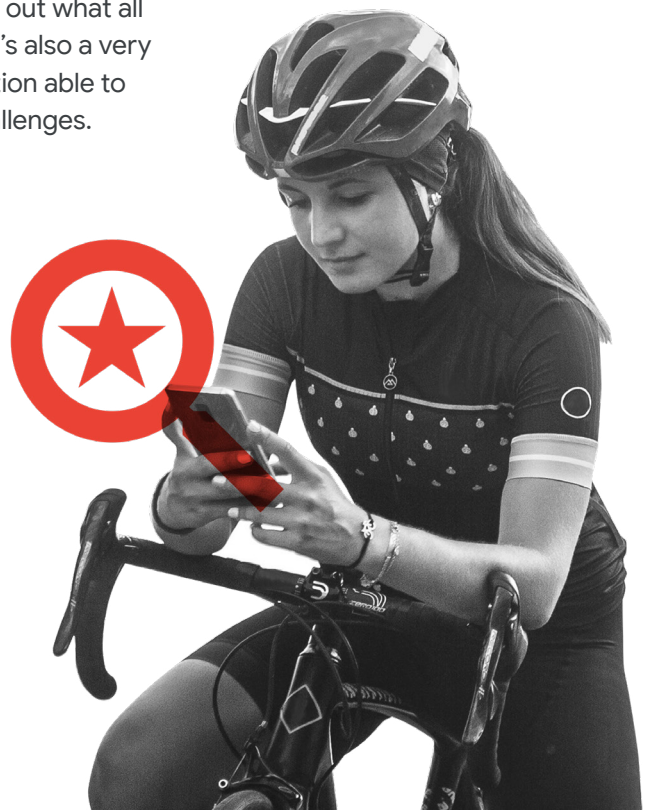
Before we dive into exploring what makes a great Health & Wellness app, let's take a quick look at the environment your current or future Health & Wellness app will be operating in.

The pandemic had a huge impact on every aspect of people's lives, especially their physical and mental wellbeing. With gyms closed and many sports banned, consumers often struggled to find alternative ways to stay active – and the repercussions have been significant. According to the mental health charity Mind, more people experienced a mental health crisis during the pandemic than ever before², with many turning to meditation and mindfulness apps to help them overcome their personal challenges.

But it's not all been bad. Working from home has given many people the time and headspace to focus on themselves, take control of their health, and establish new and healthy habits.

The Health & Wellness technology sector is rising to the challenge. Though, with that said, it's still a relatively new space. Many consumers are only beginning to get to grips with it, and figure out what all the different apps and providers can do for them. It's also a very personal category, so there's rarely one single solution able to meet everyone's unique goals, motivations and challenges.

As such, many consumers spend a lot of time researching the Health & Wellness apps marketplace to make sure the one they find (and potentially spend money on) is right for them. In fact, 85% of participants who were considering downloading an app had done some research – with almost half having spent a few days or more.³





Behavioural Economic Perspective: People know they are going on a long term journey with their mental / physical health, so they want to get it right. But the health and wellness app marketplace is new, confusing and unfamiliar to most, and they're not sure if they'll get what they need. That can lead to choice paralysis, or at least a need for some source of confidence that it will be right for them, and ultimately help in the long-term.

For explanation see Methodology 6.3.



I spent a lot of time looking at YouTube reviews and listening to what people said about the app. I wanted to be sure it was something that would work for me.”



“Some have premium layers, some of them don't. And the free access can be great or very limited. (...) Some give you 2 week trials, others 3 months... it takes some work to get it right.”

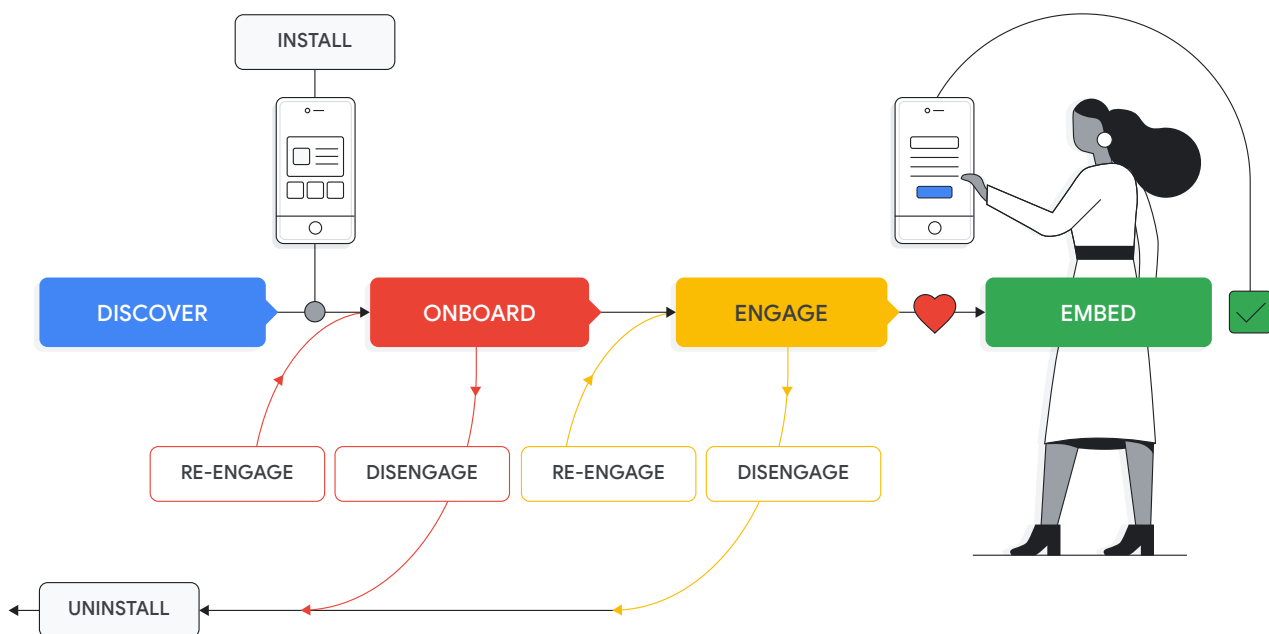



Everyone knows how easy it is to get rid of apps that don't deliver or make your life any easier. In the Health & Wellness category specifically, the most common reason users **DISENGAGE** with an app is that it's no longer deemed useful, or it's less useful than an alternative app that offers the same thing.⁴

02

WHY: Why should Health & Wellness brands establish their app as ‘vital’?

Google has partnered with MTM to develop a new model that sheds light on the journey taken by app users. It begins with how they first discover the app, then move past the moment of download to the **onboarding** process of registration, first trial and initial exploration. We then look at regular **engagement** and, ultimately, the users who progress to a deeply **embedded** end state where they consider the app to be an essential part of their lives. The model also identifies a few critical **disengagement** pinch points where people stop using the app – either by actively uninstalling it, or leaving it on their phone but never using it.



 Fig 1. Model to understand the journey that an app user takes.

Furthermore, the model reveals the critical role of user-centric design in Health & Wellness apps. Get it right, and you'll help people make the most of your app. Fail to optimise, and they won't hesitate to step away.



Behavioural Science Lens: Apps often reveal the things that brands CAN'T do. They expose how your business works – and if it doesn't work well, there's potential for real damage. When people delete your app, they cancel your brand in their mind.

For explanation see Methodology 6.3.

Our research followed consumers at all stages of the app user journey⁵. In this section, we'll share findings from those who have been engaging with a Health & Wellness app for at least a month. We'll also look at consumers who have reached the critical **EMBED** end state, where the app has become vital to their everyday life. You'll discover why these embedded users behave and feel so differently about Health & Wellness brands at this pivotal moment – and why they're more likely to share it with friends, and even spend more time and money on it.

Remember though, just 15% of **ENGAGE** Health & Wellness app users actually reach the **EMBED** stage⁶. In later chapters, we'll chart this much-prized journey, and show the steps developers can take to steer more users down this path, and avoid disengagement.

To help you draw tangible applications from the model, the findings have also been translated into a Scorecard. This rates individual app features and touchpoint levers based on their ability to guide consumers along the journey, providing app marketers and developers the means to assess current strategy and development activity, and guide priorities moving forwards.



2.1 EMBED users will visit apps more often

Given the valuable nature of the **EMBED** stage, we've intentionally set a high bar for this point – classifying it as the moment which users regard the app as 'vital'. Understandably then, users who say they “don't know what they'd do without” a particular app typically over-index in daily usage, frequency of use, and the number of activities they use the app for.

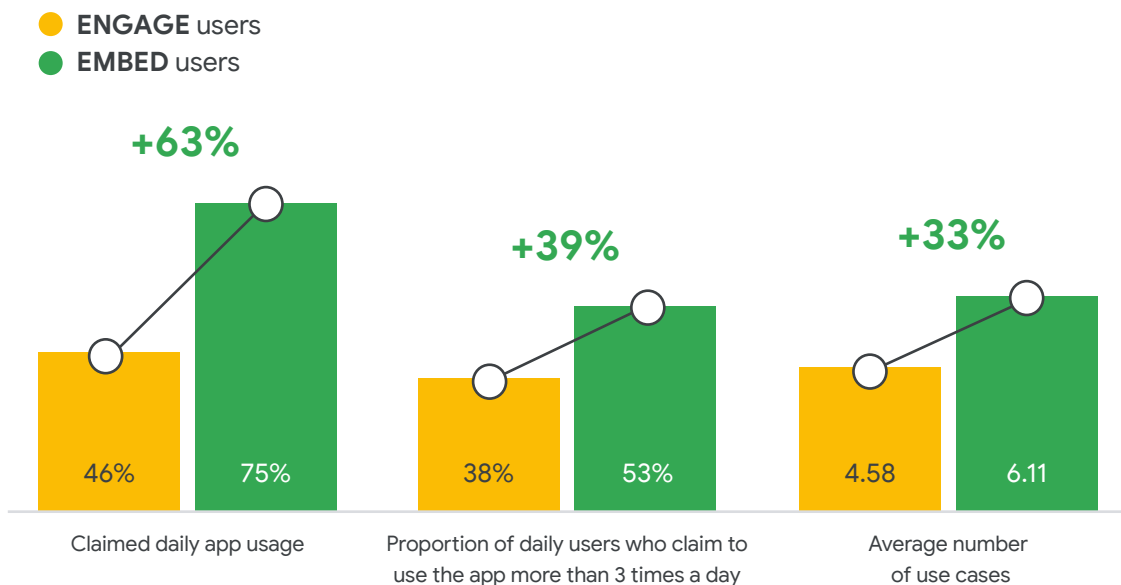


Fig 2. Claimed app usage levels among ENGAGE and EMBED users⁷ – demonstrating a proportional uplift in app usage when users reach EMBED stage

“My behaviour would definitely be different without the app, my favourite thing is how educational Noom is. It has little mini courses each day where you read a bit of knowledge then after reading it's marked off on your 'learning path' which is like a winding road of your health journey.”



“If I didn't have MyFitnessPal I would probably slip back into old habits, but if I miss a day here and there I don't feel bad or anything because it's trained me with general calories in food so I feel a bit more knowledgeable.”

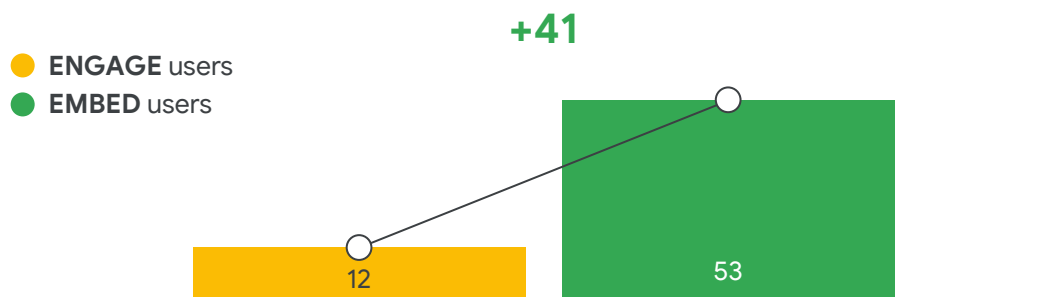


“ We are able to create routine for users - we’re there at key moments of their day and that makes the app sticky.”

–*Design Lead, Mental Health app*

2.2 Brand loyalty is higher among EMBED app users

There’s clear evidence that users who reach the “vital app” EMBED stage are more likely to have a stronger brand relationship, and feel more loyal towards Health & Wellness brands. In fact, Net Promoter Score spikes significantly among these types of users.



 **Fig 3.** App brand loyalty via Net Promoter Score (NPS) among ENGAGE and EMBED users⁸



Behavioural Science Lens: People who continue using a platform get 'bought in,' and this triggers two powerful biases:

- 1. Commitment bias:** The more people commit to something, the more they’ll try to stick with it.
- 2. Confirmation bias.** The more people use something, the more they’ll tend to recognise success and downplay shortcomings.

As the app becomes a natural way for people to do things, they also get better at using it – and are more likely to recommend it.

For explanation see Methodology 6.3.

2.3 Revenue is higher from EMBEDDED app users

Users who move from **ENGAGE** to **EMBED** also show a higher average spend per app or per content/feature.

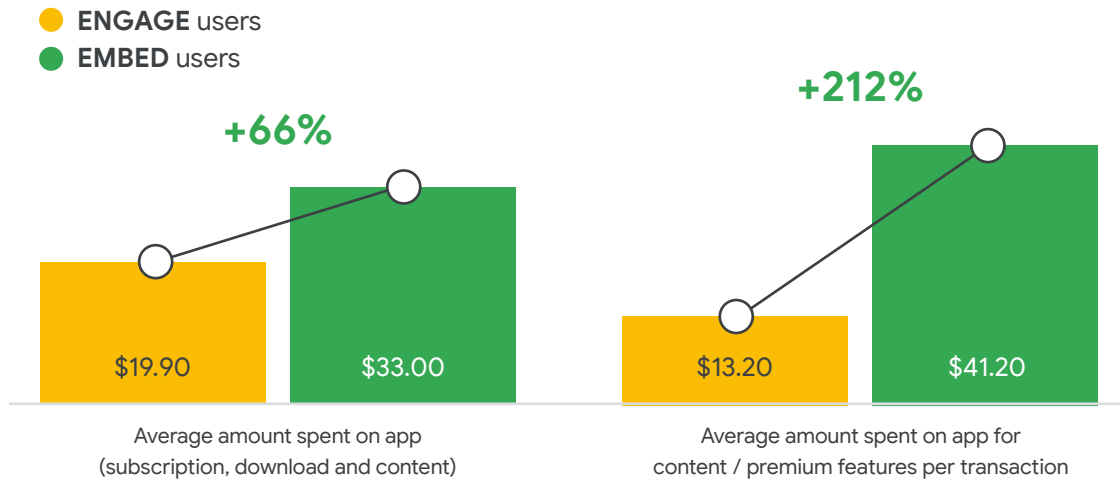


Fig 4. Claimed average spend on content on app per transaction among ENGAGE and EMBED users⁹

Why is spend higher for these users? If you’ve ever started a new health kick or made real and lasting changes to behaviours, you’ll likely have experienced multiple failures and frustrations along the way. But while sticking to healthy habits long-term is hard, Health & Wellness apps make it easier for people to achieve positive change – and that’s something many users are happy to pay for.

“On Headspace I’ve got premium. It’s like my ride or die. The personalisation is amazing. It gets to know what I like and gives me suggestions. It helps keep me present.”



“There is a general rule that the more engaged you are, the more likely you are to subscribe.”

–Marketing Lead, Fitness App

If we drill down into the findings, we see that **ENGAGE** app users say the main benefits of apps relate to either simplicity or efficiency. For example, “simplifies my life” (35% of respondents); followed by “easy to navigate” (34%); plus “helps me organise my life” and “saves me time” (both 32%).¹⁰ Simple and easy to use apps can help you organise your life and enable you to track and meet your goals.



Behavioural Science Lens: Good apps will help people build habits that support their larger goal. People don't buy into these apps to reorganise their lives, but that's what good apps will do.

For explanation see Methodology 6.3.



03

WHAT: What is the route to a successful Health & Wellness app?

In this chapter, you'll learn about the do's and don'ts of app marketing and optimisation. You'll also discover insights you can leverage to encourage consumers to **ENGAGE** with your Health & Wellness app, and successfully reach the **EMBED** stage.

3.1 Be present at impactful discovery points

To help you identify which marketing moments and opportunities to prioritise, we've classified **DISCOVER** touchpoints around two factors: their ability to influence consumer decision-making; and their strength in building awareness.

This provides the basis for our **DISCOVER** stage Scorecard, which classifies marketing levers into **four tiers**:

- **Nascent** – Those with limited reach and impact
- **Reach** – Those which build awareness, softer impact
- **Impact** – Those which have strong impact, but more limited reach
- **Priority** – Those that provide both reach and impact



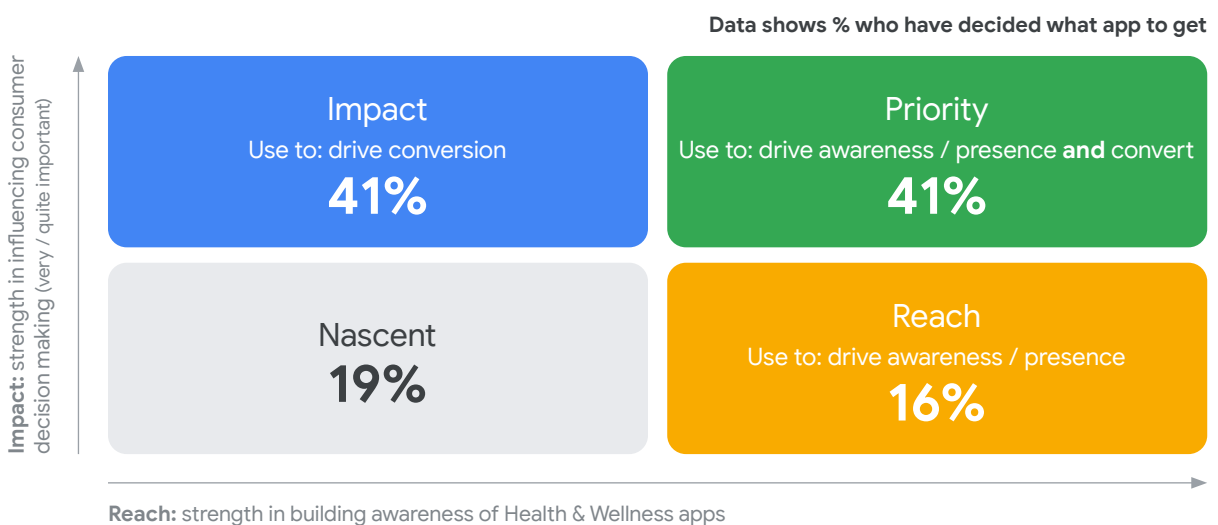
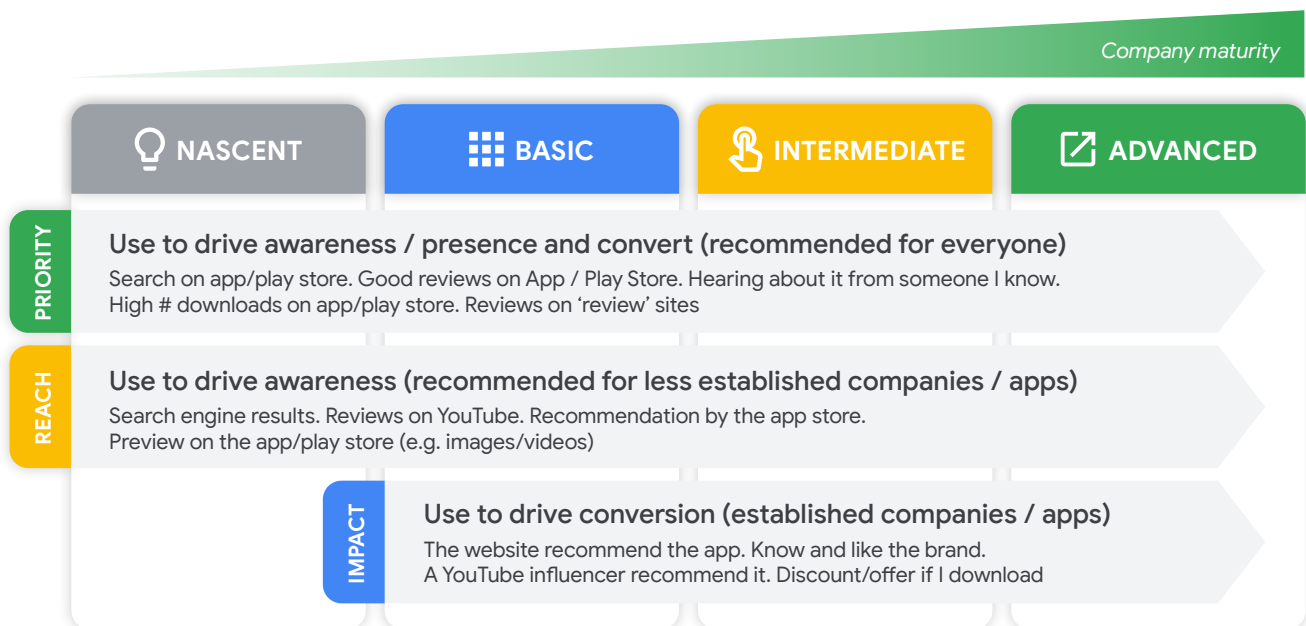


Fig 5. DISCOVER SCORECARD; Based on awareness and importance of discovery touchpoints among consumers currently in the DISCOVER stage who are considering downloading a Health & Wellness app.¹¹

For the purposes of this insight, we've focused on social proof, search, visual previews, and leveraging brand relationship. In other words, Health & Wellness **'Priority'** touchpoints that deliver both strong impact in driving downloads, and to a wide pool of potential users.

3.1.1 Reinforce trust through social proof

Health & Wellness apps are a relatively new space for consumers, which is why many of them rely on things like reviews, endorsements and influencers as the ‘wisdom of the crowd’ to help inform their decision. Indeed, the top three most influential touchpoints all relate to social proof. For example, “good reviews on the App Store / Play Store takes the top spot (64% of respondents); followed by word-of-mouth (62%); and “reviews on review sites” (61%).¹²



Behavioural Economic Perspective: Social proof is very powerful with apps, because people use it as a sign of ‘natural selection’ between all the different apps and platforms. They interpret being well-known, talked about, and on non-digital media, as clear signs that a platform is ‘for real’. For example, Peloton needs to be on TV to make people feel comfortable about paying for the bike. It builds trust that the people you got the bike from won’t go bust tomorrow and leave you high and dry. It’s hard enough to get an impression of a simple app, let alone one you’ll have to spend a lot of money subscribing to for months or even years. That’s why testimonials that talk about long-term use and people connecting with the app can be so persuasive. This heuristic is a shortcut that gives people a feeling of what it’s like to really ‘own’ the app.

For explanation see Methodology 6.3.

The content of user reviews - *what* people say - is vital, but it’s also a numbers game. While the number of people endorsing an app will certainly raise consumer confidence, the sheer number of App Store / Play Store downloads is actually the fifth most influential factor (cited by 58% of respondents¹³). It’s also especially important for consumers who are close to the moment of download.

“ I will check the number of downloads and average rating. If you see they’ve had thousands of downloads and good ratings you know you’ll be satisfied.”



Users also turn to more credible authorities in this space to gather more informed, expert opinions. For example, 42% of people thinking about downloading a Health & Wellness app say recommendations from YouTube influencers are an impactful touchpoint.¹⁴

“Podcasters are a big influence. I was listening to Rich Roll who was talking to Sam Harris and he mentioned the Waking Up app. Because it’s from two people I trust, I’ll give it a go.”



“We wanted to scale our organic word-of-mouth, so we worked with influencers, and promoted and shared their activities, building partnerships so that our platform was something that people talked about.”

–*Marketing Lead, Fitness App*

3.1.2 Amplify presence through organic and in-organic search optimisation

The App Store and Play Store are both major touchpoints for consumers looking to explore Health & Wellness apps. As such, App Store Optimisation (ASO) emerges as the main organic way for Health & Wellness brands to maximise presence among consumers in an impactful channel (ranks 4th, 60%).¹⁵

Looking beyond ASO to in-organic means of app promotion, traditional Search Engine Optimisation (SEO) is also critical to get right as a consumer touchpoint that drives both reach, and holds considerable sway over the consumer decision-making process (ranks 7th, 56%).¹⁶

3.1.3 Set expectations with previews

Finding the right Health & Wellness app can be a very personal choice, and people understandably want to make the most informed decision possible. That’s reflected in our research, which reveals that more than half (59%) of those considering downloading a Health & Wellness app spend a day or more researching their options.¹⁷

Previews are classed as a 'reach' touchpoint in our scorecard (#6, 57%)¹⁸ – offering people a valuable sneak peak into what using an app might be like. Indeed, closing the gap between expectations and reality helps drive acquisition and reduce churn. More than a third (35%)¹⁹ of those who stopped using a Health & Wellness app did so because it didn't do what they expected it to do, or wasn't as described (the third most common reason for churn).

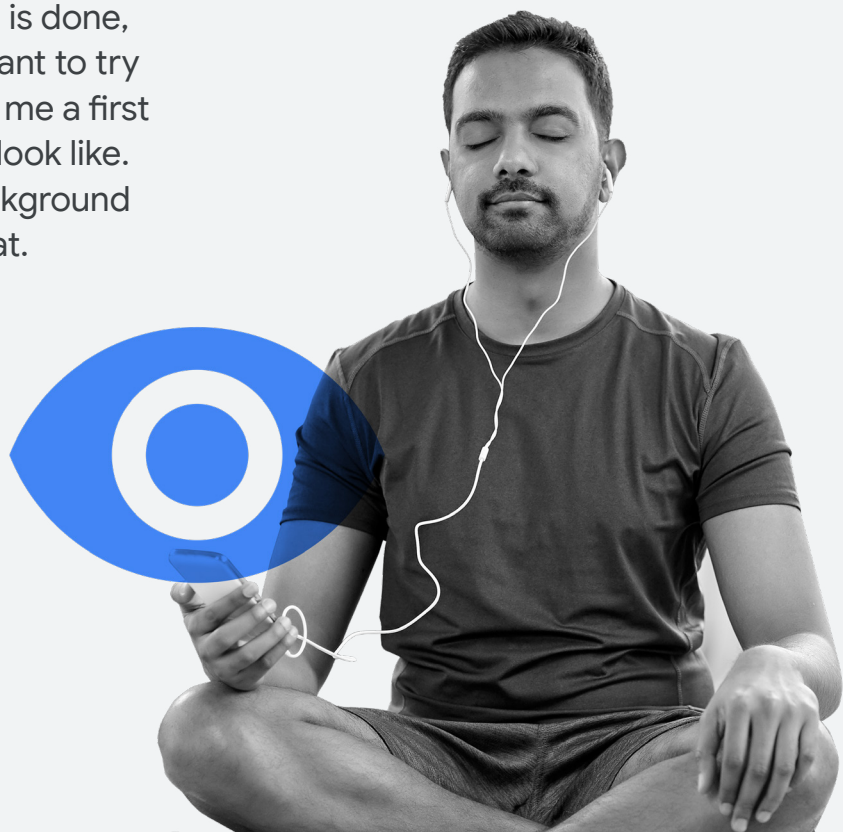
It's also important to make it clear which (if any) of your app's content and features people can use for free. Downloading an app only to find out there's no free functionality is one of the main frustrations during **ONBOARD**, but one that detailed previews can certainly help prevent.²⁰



Behavioural Economic Perspective: Trialling an app can be a blind chase when you know little about it. The commitment is unclear and potentially a big time sink if you end up deleting it. Previews help offset those concerns and build confidence.

For explanation see Methodology 6.3.

“ On the app store I will look at the images and interface of how the app is done, to see if it really makes me want to try it in terms of colours. It gives me a first glimpse of what it's going to look like. If it's a sleep app and the background colour is white that's not great. The interface is extremely important in an app.”



3.1.4 Leverage the power of brand awareness and salience

Just like with any other relatively new category, consumers feel more confident downloading an app if there's already a strong brand relationship. In the research, "I know and like the brand" emerges as a key factor influencing which app is downloaded (ranks 8th, 53%).²¹



Behavioural Economic Perspective: People are slow to commit, and look to protect their emotional investment by only going with a brand that is a proven winner. Especially for sensitive issues around wellness, they have to be discerning. Brand offers an important cue.

For explanation see Methodology 6.3.

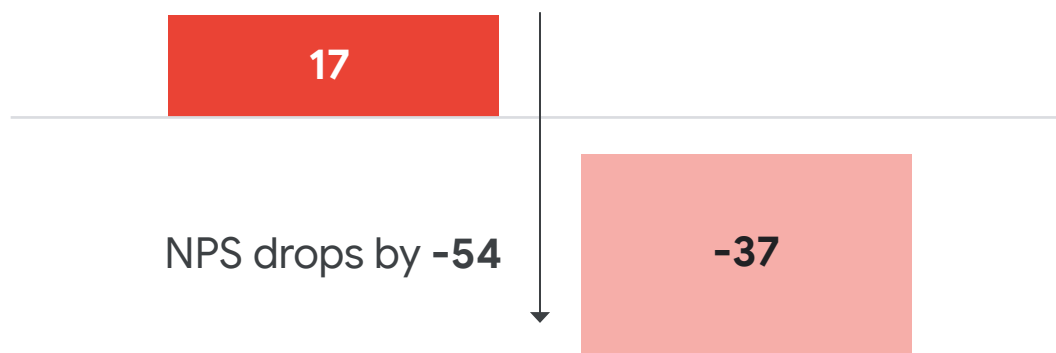
Consumers tend to place faith in what they already know, so those brands with existing customer relationships have an easier platform from which to build their app presence. This could either be well known Health & Wellness apps such as Calm, Strava etc., or brands like Nike which are well known outside the category.


A brand's website also plays a key role in app promotion. When citing a reason for choosing a particular app, almost half of users (45%) say "the website recommended it."²² Developers use a range of techniques to leverage this touchpoint, such as promoting their app on landing pages or using deep links that take users from marketing emails or web product pages to the equivalent app version. Indeed, a [recent Google study](#) showed that, on average, deep linked ad experiences can double conversion rates.

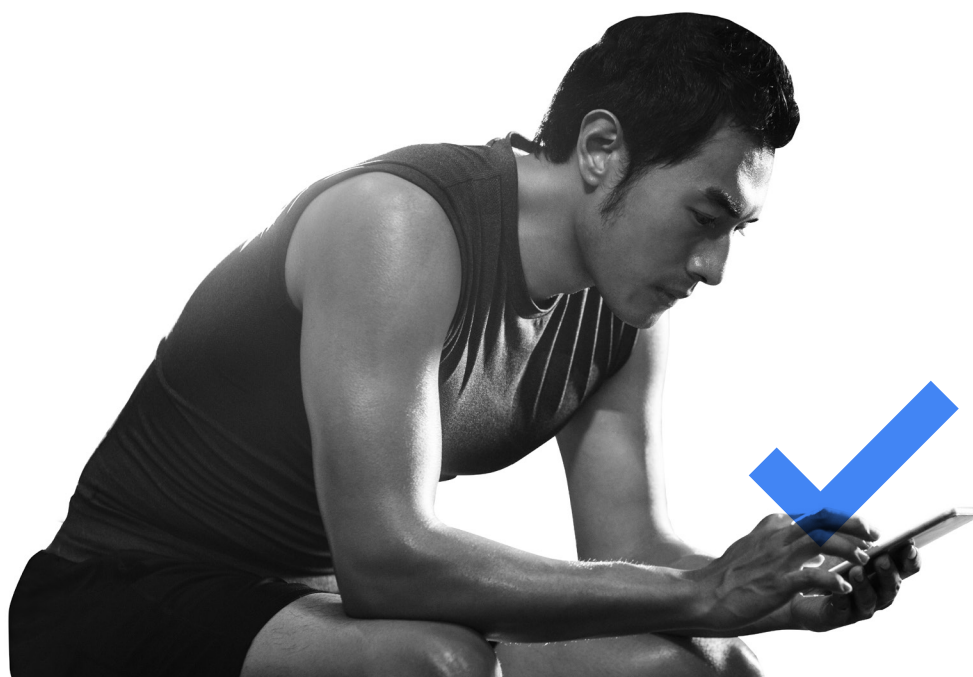
3.2 Delight during onboarding

The first few tentative minutes of using an app can be a critical moment of truth that often triggers a dramatic love or hate user response. This makes **ONBOARDING** a vital stage for brands to get right, and ultimately encourage repeat use and a fruitful ongoing relationship. When **ONBOARDING** is done badly and users churn before successfully signing up, there is a 54 point drop in Net Promoter Score (NPS) – with users becoming detractors instead of promoters.

- **ONBOARD** users
- Disengaged during **ONBOARDING**



 **Fig 6.** App / brand loyalty as measured by Net Promoter Score (NPS) among ONBOARD users and those who disengaged during ONBOARDING²³



3.2.1 Frictionless registration and an intuitive first usage experience are the best ways to ensure maximum brand benefit, and encourage users to return

ONBOARDING can be one of the more exasperating experiences of using an app, which often leads to churn. Those who disengaged with a Health & Wellness app during **ONBOARDING** reported experiencing an average of 7.6²⁴ frustrations from a list of 18 potential issues at this stage.

Even those who complete **ONBOARDING** and become app users still report frustrations at this point (4.9 on average).²⁵ While these bugbears aren't quite enough to dissuade users who are strongly committed to using the app, brands can still benefit from ironing out any snags during this 'hit or miss' part of the process.



Behavioural Economic Perspective: Many apps will ask things that people just don't know very early on. If you ask people a question they're unsure about, it sends a disproportionate signal that the app is not for them. Most people know they have a problem and they want to make a long-term commitment. Good onboarding will not insist on people knowing things now unless it gives them immediate value. The 'Couch to 5k' is smart here because it's already set an arbitrary goal (which people don't have to stick to) and concentrates on how the journey will work. Too many apps in this space, even if inadvertently, assume you already know more than you do. Better to experience the functions and make them feel good, and then build in the goals and gather more data.

For explanation see Methodology 6.3.

“ The interface should be self evident and the navigation shouldn't require explanation.”

–*Design Lead, Mental Health app*

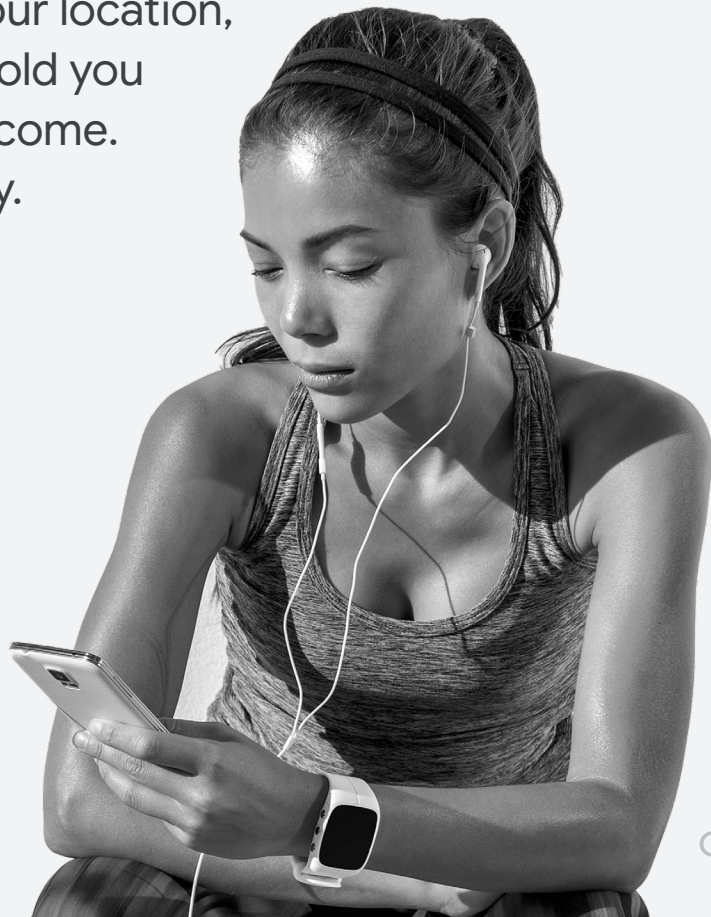
3.2.2 Don't be too demanding

The research shows that the top two frustrations of users who disengaged during **ONBOARDING** are when apps demand too much, too soon; ask for “too much personal information” (46% of respondents), and “it wanted access to my camera/ location/ microphone/ photos etc. that I didn't want to give” (44%).²⁶ If these permissions are essential, be sure to make it clear why they're needed in the context of the app, so users know the end benefit.

Compounding this, most users want to explore the app and get a feel for it before committing to entering their details. They also get particularly frustrated during **ONBOARD** when an app is too transactional, and pushes them towards premium tiers right away, or even asks for billing and bank details.



I don't like it when the process feels invasive, if the questions are asking about your location, the type of household you live in, even your income. It feels unnecessary.



3.2.3 Set expectations with previews, and help users get going quickly

Users want to get going with an app as quickly as possible, and there are three elements to **ONBOARD** that app developers can do to encourage this.

Firstly, ensure your app's navigation is clear and simple. In the research, "can't easily find the feature I wanted to use" was the joint third frustration during **ONBOARD** (42% of respondents²⁷). Offering tutorials and previews during first use can help manage expectations from the outset, and reduce frustration and churn. They're also a powerful way to reinforce and build on any expectations set by previews in the **DISCOVER** phase.

Secondly, it's frustrating when users come up against a payment barrier they weren't expecting. Again, 42% of respondents cited "there was no free functionality" as a key frustration during **ONBOARD** (joint #3).²⁸

Thirdly, people want to get through **ONBOARDING** as quickly as possible. Of respondents who had registered with a Health & Wellness app, 90%²⁹ felt the process was quick, or in line with their expectations. From the research, five minutes is seen as the ideal length of time, but some users will tolerate up to twice that. Users who experienced an **ONBOARDING** process that took more than around 10 minutes were significantly more likely to say the process was too long.³⁰

3.2.4 Last but not least: personalise with a point, and at the right time

Our exploration uncovered two types of personalisation, each triggering different responses from consumers.

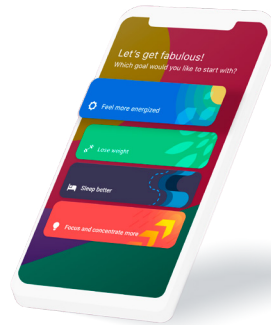
The first kind is personalisation with a point, which enhances user outcomes. This type of personalisation is characterised by customisable notifications and the ability to customise your tastes and preferences (see Calm App in Figure 7).³¹ This helps make the experience more relevant and meaningful for users. Ultimately, an app that 'works for you' is less likely to be uninstalled.



Calm Meditation App

- Regular updates to demonstrate value of data exchange
- Sufficient detail to generate a tailored experience

“ You can click your goals at the start, and **there are enough options there to feel like it will tailor your experience in a more specific way.** Personalisation makes the app feel more effective, because then suggested options come after so you see the benefits of what you’ve put in.”



Fabulous Self Care App

- Lacks tailored feel
- Data capture feels self-serving for the app

“ It asked a lot of questions and delved into everything about me and my goals - how I feel generally, my stresses etc. - but after doing all of that nothing on the app felt personalised. **It felt like if I had’ve answered completely differently nothing would’ve changed.** Made me think, were these questions more for them or for me?”



Fig 7. Case studies of good and bad personalisation³²

The second kind are those personalisation features that aren’t directly linked to improving user outcomes – and which people understandably are inclined to feel indifferent about.³³ For example, customising an avatar or adding friends via Facebook or email. When investing in features that allow users to tailor their experiences, those offering a tangible benefit are more likely to bring you a better return.

Giving users the option to quickly set up personalisation at the outset is a way to show the app’s potential value in their life, and deepen engagement. However, many Health & Wellness app users just want to download their app and get started without having to share too much personal information so early on. With that in mind, make personalisation optional during **ONBOARD** by giving users the chance to skip it and do it later.

You could then consider nudging or re-inviting people to personalise the app after they’ve been using it for a while.

To help app developers identify which features to prioritise at **ONBOARDING**, we've classified **ONBOARD** features based on Kano analysis to provide the foundation for our **ONBOARD** stage Scorecard:

- **Nascent** – features are elements which users feel indifferent about, and that don't currently enhance the **ONBOARDING** experience.
- **Basic** – features are expected by all users, and definitely missed if not present.
- **Intermediate** – features are performance factors which are reasonably expected, and drive satisfaction when present.
- **Advanced** – features or 'delighters' are those which aren't expected, but delight when present.
- **Detractor** – features are elements which users prefer not to have, or even actively dislike.

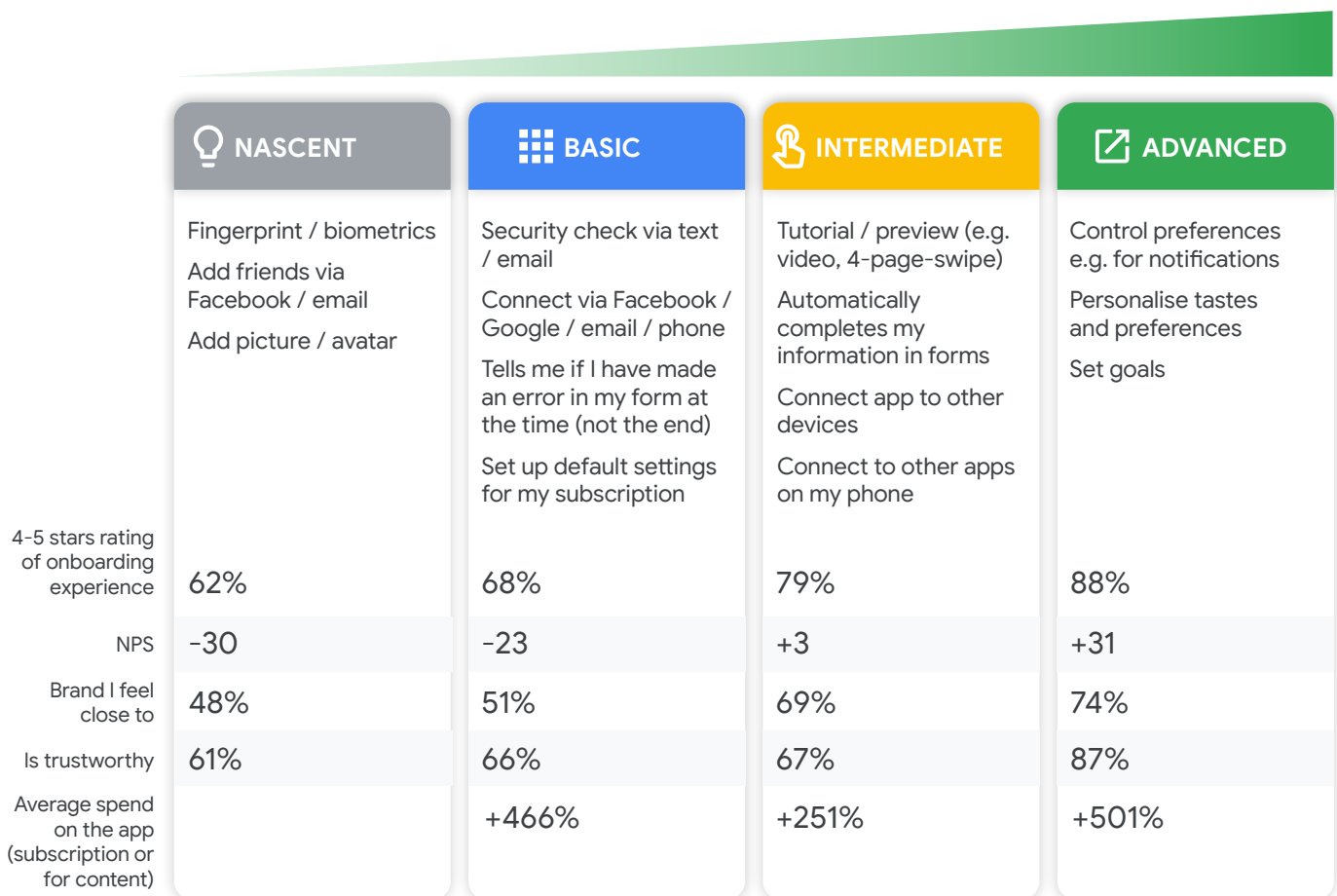


Fig 8. ONBOARD SCORECARD; Based on Kano analysis of **ONBOARDING** features among **ONBOARD** users.³⁴

3.3 ENGAGE users to EMBED: Establish your app as 'vital'

If an app has performed well during **ONBOARDING** and users begin to **ENGAGE** by using it for a while, the next challenge is to convert them to the longer-term **EMBED** stage. There are three things you'll need to do to achieve this: make it easy for people to get into the app and start using it; quickly motivate them and facilitate progression towards their goals; and challenge them beyond their original goals.



Fig 9. The three key areas apps need to do well to convert **ENGAGE** to **EMBED** users, data among **EMBED** users.³⁵

“Initially I just focused on the features I was interested in, but then out of curiosity I discovered new features, like yoga. The Nike app doesn’t make me think of yoga. Before lockdown I used it as a supplement, but since lockdown I’ve started using it on a much more regular and organized basis. It was a way to pass the time, but also a great way to take your mind off things.”



“Our goal is to create an app experience where, as soon as you open our app, you start to feel better immediately - we want to create that safe space.”

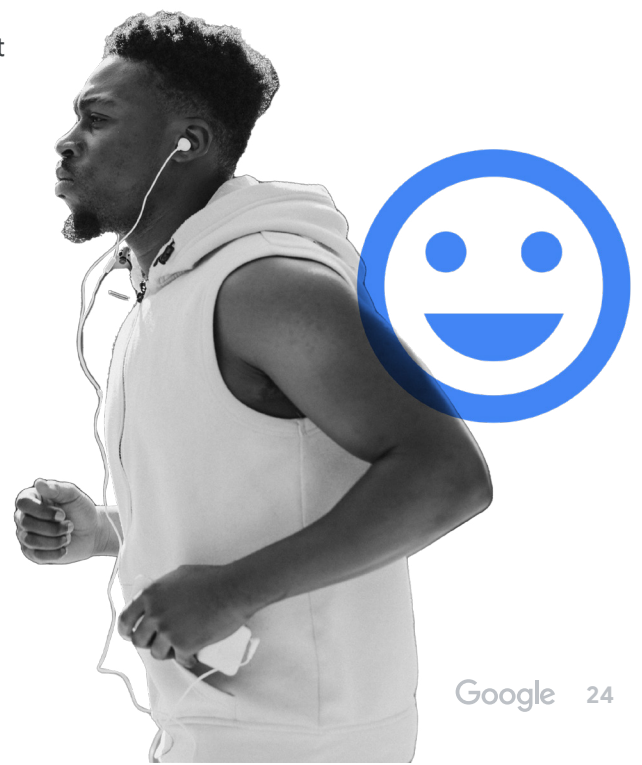
–*Design Lead, Mental Health app*

3.3.1 Make it easy for users to get going quickly

Downloading a Health & Wellness app can be an early step people take in a journey to bettering themselves. What developers must do next is find ways to keep that momentum going. As mentioned earlier, the critical factor here is creating a quick and easy **ONBOARD** and log-in process that lets users navigate to the right content without too many hassles or distractions.

When designing features to encourage longer term engagement, there are four key consumer needs that developers should bear in mind: “Helps me be more efficient” (cited by 30% of **EMBED** users as a reason they use their Health & Wellness apps); “makes my life easier” (26%); “helps me be more organised” (25%); and “to be in control” (25%).³⁶

Creating an app experience that delivers those needs is absolutely vital for building on people’s impetus, and ultimately turning **ENGAGE** users into **EMBED** users. Our research identifies four ‘must have’ features here.



Quick and easy log-in

Prioritise features that help people access your app smoothly and efficiently. For example, password / PIN logins are #8 among features used, especially if their details are remembered each time (#4).³⁷

Easily connects to other apps and devices

Health & Wellness apps are rarely used in isolation, and often form part of a portfolio of apps and devices that all work together to help users achieve their goals. Ensuring your app easily connects to other relevant platforms will make people's lives easier, and give them a sense of control over their Health & Wellness journey.³⁸ Encouraging users to make your app part of a wider ecosystem also helps **EMBED** it within their lives. In fact, **EMBED** users are significantly more likely to connect apps to other devices (24% vs 15% of **ENGAGE** users).³⁹

Easy navigation

Make it easy for users to go straight to the content they want without any hassle or distractions. "Tabs to navigate between pages" were mentioned by 14% of respondents, along with "easy to compare between products/items" (23%), and "not cluttering the experience with ads" (17%).⁴⁰

Goal setting

Lastly, a big part of helping people to quickly get going is by allowing them to set goals and then tailor them. Both these features 'delight' users, as they help them take control of their health and wellness journey, and achieve purpose and direction from the outset. "Set / change goals" is actually the number one feature used during **ONBOARD**,⁴¹ and a key feature at the **ENGAGE** stage, too (used by 1 in 3 respondents).⁴²

“ [MyFitnessPal] helps me make better decisions. The integration with Strava is massive. I know what I can eat after a 10km run.”



“I like apps that try and understand what you are trying to achieve. Most of the health and wellness apps I have give you a soft curated list of priorities and activities when you sign-up.”



3.3.2 Motivate users and facilitate progression

Health & Wellness app use is often driven by people's emotional needs, with the top three being "to better myself" (46%); "to motivate myself" (44%); and "to progress and develop" (33%).⁴³



Fulfilling these needs is especially important at this second stage, because it gives users a reason to come back to the app after that critical first exploration.

As before, we've identified six features that developers can use to help motivate users and encourage progression.

Make it easy to track key stats

Among the most 'surprising and delightful' features for Health & Wellness apps are diaries / journals for tracking behaviours and health metrics (used by a quarter of respondents). The ability to scan barcodes / QR codes⁴⁴ is also important. These particular features are valued by users because they make their lives easier, and take the hassle out of the more repetitive and menial tasks involved in achieving their goals.

Reduce the number of steps

The best apps also make people's lives easier by offering features like remembering their payment details, shipping address, recent activities, and even tracking or using their location.⁴⁵ While many people now expect these features as standard, their inclusion still significantly impacts user satisfaction.



Behavioural Economic Perspective: Apps can be very good at doing certain things that people are bad at, like remembering or recording things. The structure they offer makes it easier to achieve goals if you don't also have to provide the framework, planning and recording of progress. A simple example would be the discipline of step counting which works well for many people because something records their steps (which they wouldn't have known before), and they find ways to make up missing steps, which is relatively simple because walking is generally easy to fit in.

For explanation see Methodology 6.3.

Additional content and support materials

Health & Wellness is a vast category, so it can be difficult for some users to even know where to start, let alone how they should go about achieving their goals. If possible, your app should offer a range of support materials to guide and inspire users on their journey. This could be things like expert tips / articles / advice on a range of topics, or even live videos.⁴⁶

Personalisation features

The Health & Wellness category is also a very personal one, and many apps simply get deleted because they don't meet people's specific needs and preferences. To reduce frustrations and ultimately prevent churn, look for ways your app can offer more personalisation. Two particular favourites from the research are "personalised / remembers my search filter" and "customisable profile page".⁴⁷

Remember, make sure users know they can tailor the app at any stage (either at **ONBOARD** or **ENGAGE**), and that doing so will help them get the most out of it. Lastly, if users choose not to personalise their app at **ONBOARD**, your app should prompt them again at a later stage.

Analytics features

Two of the most popular app features in the Health & Wellness category are "seeing my progress" (#1) and "gives me insights about my behaviour" (#10).⁴⁸ As such, it's vital your app offers analytics features that deliver these insights. Providing notifications about goals that have been met is especially important for users, as it creates a sense of excitement and motivates them to keep going.



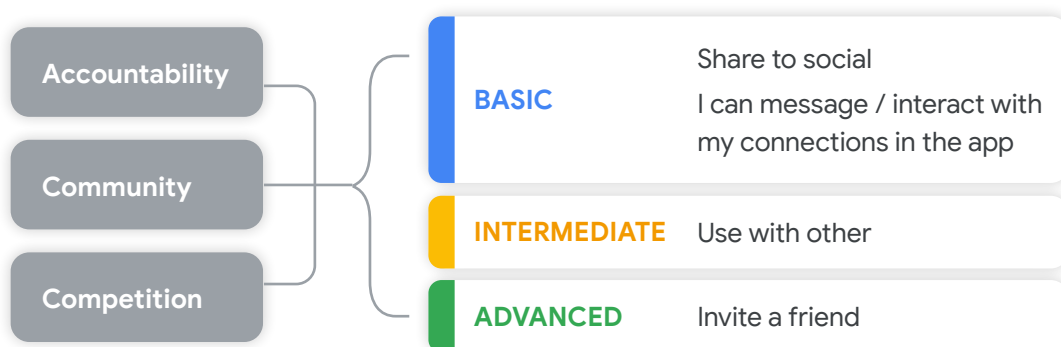
I need to keep track of things. It's my OCD – it means I have to be organised... I can go back and say 'That day wasn't so bad.' It gives me a moment to tell myself I'm making progress."




Social features

Last but not least, social connections are another tool for motivating Health & Wellness app users, particularly in the exercise sub-vertical. In our research, we identify accountability, community and competition as the three main drivers of progress (see Figure 10) – depending on the specific goal people want to achieve.

Whether consciously or unconsciously, users will also grade their app’s social features. For example, “share to social” and “messaging / interacting with connection in app” are seen as ‘hygiene’ or standard features that are to be expected. Whereas “use with others” is more intermediate and something users may typically expect, but which still boosts satisfaction with the app when present. The social feature that most delights users is the ability to invite a friend.⁴⁹



 **Fig 10.** The three main ways social is used to drive progress, and the different features that can help enhance that social connection.⁵⁰

“ I have competitions with friends on Nike Run Club. There’s 10 of us from my university course. Things like who will be the first one to hit 100km, it creates a competitiveness that at the start we all wanted to be number 1, but now after a few months it’s all about making the top 3, that satisfaction of beating other people.”



“A few of my apps motivate me, but Peloton does it better than any others. It really goes above and beyond – the high fives, everything to make you feel part of a community.”



3.3.3 Challenge users beyond original goals

Lots of people turn to Health & Wellness apps to help them solve a specific problem, whether it's losing weight for a wedding, or as a way to cope with work stress. For app developers, the challenge is giving people a reason to keep on using your app longer-term, even after their goal has been achieved.



Behavioural Economic Perspective: As we achieve personal goals, we also learn about ourselves and discover new challenges and possibilities.

Apps can help people do this by coaching them to be aware of this journey, and encouraging them to celebrate and embrace their new self. This is critical with things like weight loss diets where people often revert to the eating habits of their 'old self' – inevitably causing the weight to return.

From a developer's point of view, these users need to 're-contract' with the app periodically – given that the 'original' user will hopefully have changed enough to be thinking of new goals. Without this, the relationship becomes purely transactional, and terminates either at the point of failure or success.

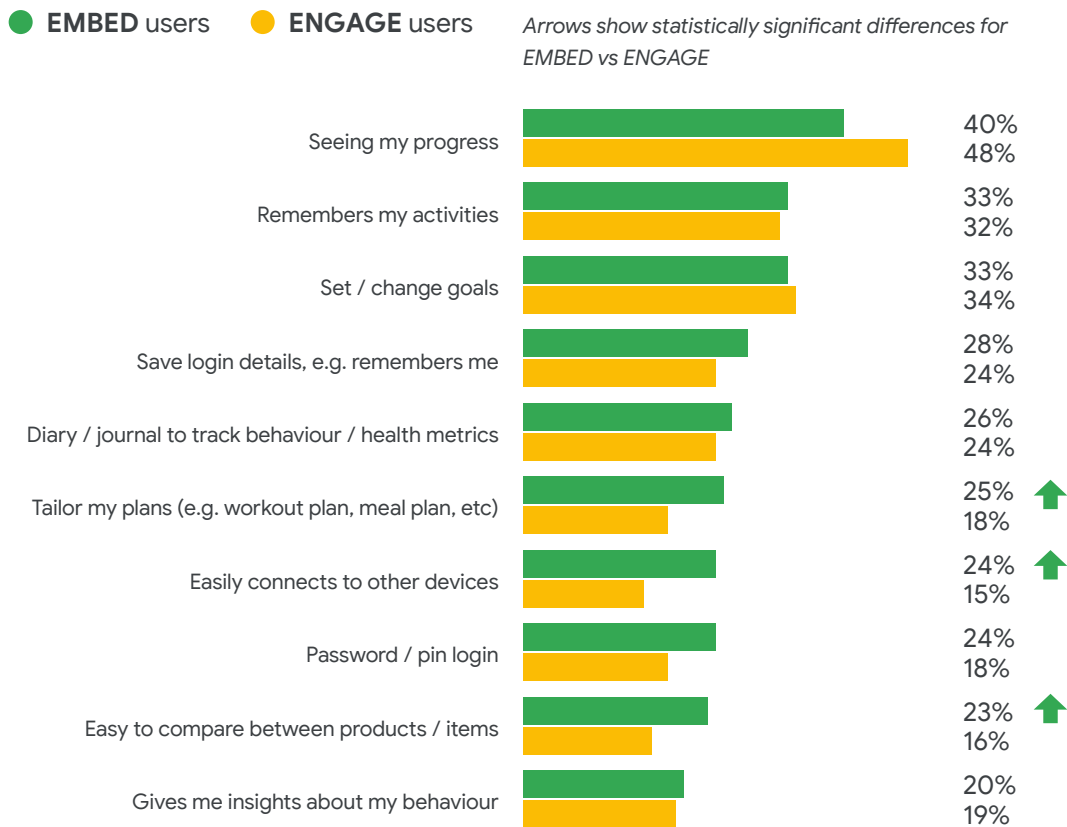
For explanation see Methodology 6.3.

This is evident in the research, where one in three **ENGAGE** users say they turn to apps because they want to be challenged.⁵¹ App developers can achieve this in two ways – either by encouraging them to exceed their original goal (e.g. "how about trying 15,000 steps per day?"); or steering them to previously unexplored areas of the app (e.g. "you've trained your body, now let's train your mind with meditation"). Another important emotional need for a quarter of EMBED users is averting future physical and mental health issues.⁵²

“Recording an activity and self-improvement go hand-in-hand; they're linked and it's one of the key reasons why users would engage with the platform – to set goals and track their progress.”

–*Marketing Lead, Fitness App*

One way to prevent an app losing its usefulness is by shifting users' mindsets away from being problem-focused, to seeing Health & Wellness as a lifestyle choice for achieving healthy long-term benefits.



 **Fig 11.** Top 10 features used in Health & Wellness apps among ENGAGE and EMBED users.⁵³

To help app developers identify which features should be prioritised in the long-term to help migrate **ENGAGED** users to **EMBED**, we have classified features based on Kano analysis to provide the foundation for our **USER** Scorecard.

- **Nascent features** – are elements which users feel indifferent about, and that don't currently enhance the **ONBOARDING** experience.
- **Basic features** – are expected by all users, and crucially missed if not present.
- **Intermediate features** – are performance factors which are reasonably expected, and drive satisfaction when present.
- **Advanced features** – or 'delighters' are those which aren't expected, but delight when present.
- **Detractor features** – are elements which users prefer not to have, or even actively dislike.





| |  NASCENT |  BASIC |  INTERMEDIATE |  ADVANCED |
|---|--|--|---|---|
| | <ul style="list-style-type: none"> Biometric login Personalised recommendations Lets me change my location settings Remembers my past orders User reviews within app Search filters Instant transaction confirmation Buy with one click Easily connects to third party payment options Pre-recorded content Detailed product / service information In app promotions / discounts In app games | <ul style="list-style-type: none"> Box where I can search using words Favourites / wishlist / watchlist Self diagnosis tool Relevant / useful notifications Lets me personalise my notifications Customer service chat FAQs / help page Share to social I can message / interact with my connections in the app | <ul style="list-style-type: none"> Password / pin login Tabs to navigate between pages Easy to compare between products / items Ad free / no ads in the app Personalised / remembers my search filters Customisable profile page Remembers my payment details Remembers my address / contact details Remembers my activities Track / use your location Seeing my progress Gives me insights about my behaviour In app rewards Use with others | <ul style="list-style-type: none"> Set - change goals (e.g. target weight) Easily connects with other apps Easily connects to other devices Tailor my plans (e.g. workout plan) Manage my subscription Diary / journal to track behaviour / health metrics Scan barcodes / QR codes of products Tips / articles / advice from experts on a range of topics providing in depth information, inspiration, guidance and advice Live videos Invite a friend |
| NPS | -46 | -21 | +14 | +20 |
| Brands I feel close to | 48% | 64% | 68% | 71% |
| Weekly use | 79% | 76% | 79% | 92% |
| Average number of use cases | 2.6 | 1.9 | 4.2 | 7.3 |
| Spend on app (either one off fee or subscription) | 21% | 18% | 19% | 26% |

 Fig 12. USER SCORECARD; Based on Kano analysis of features among EMBED users.⁵⁴

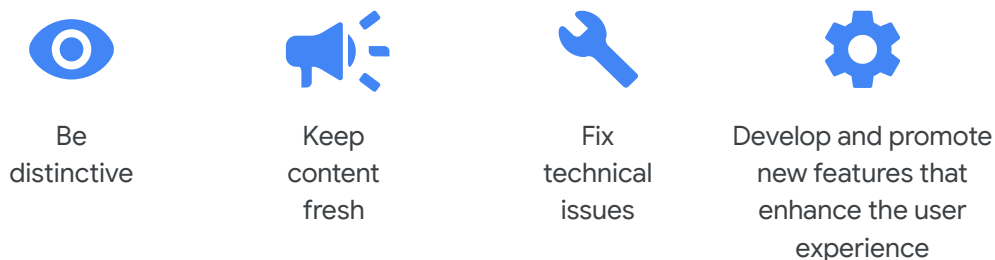
04

HOW: How do you stop users from disengaging, and win them back?

While the ultimate goal for any app is to **EMBED** it in the hearts and minds of users, at the other end of the spectrum is the need to stem losses and reduce the number of people who disengage or lapse. While challenging, it's by no means impossible – and 1 in 3 of our respondents who have stopped using an app say they went on to start using it again.⁵⁵

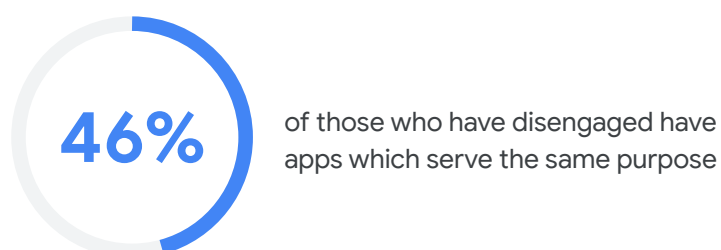
In this chapter, we'll explore the steps developers can take to help turn the tide, and create opportunities to re-engage with lapsed users.

Specifically, there are four key tactics developers can deploy to reduce frustration and drive reappraisal: be distinctive; keep content fresh; fix technical issues; and develop and promote new features that enhance the user experience.



4.1 Be distinctive and continue to innovate

The most common reason given by users for disengaging with a Health & Wellness app is lack of differentiation from other brands (“I have apps which serve a similar purpose,” 46%, see Figure 13). Making your app positively and meaningfully different is vital from the start, as is continually refreshing your content and features to maintain relevance and guard against new entrants offering the ‘next best thing’. Indeed, developing new features is cited as a top reason why lapsed users would consider re-engaging with a Health & Wellness app.⁵⁶



4.2 Keep your content fresh and up-to-date

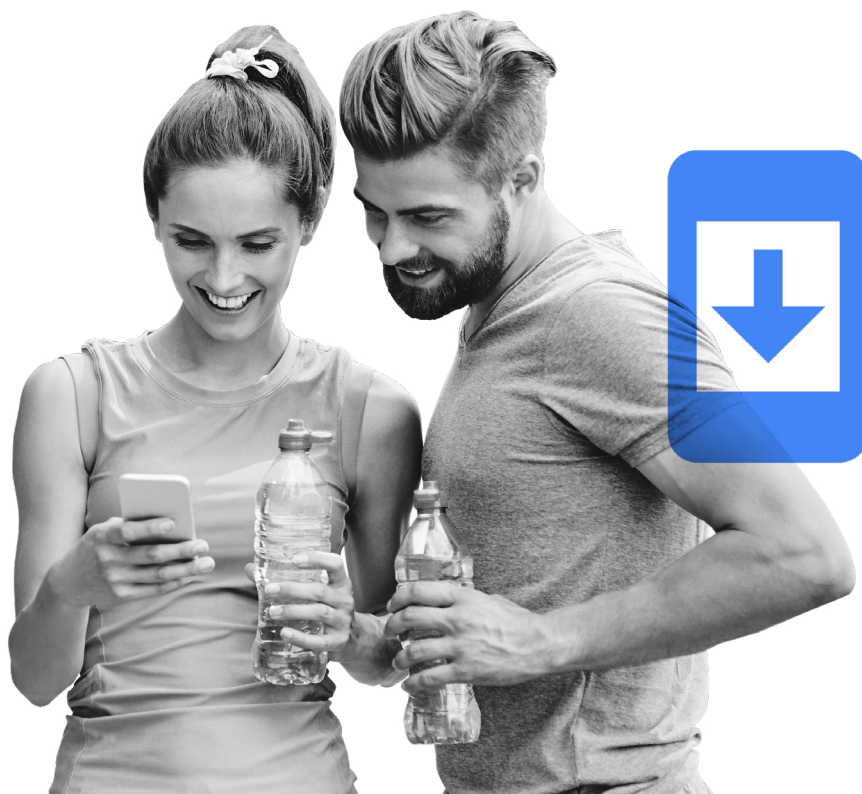
Lack of choice is a top five reason for disengagement with Health & Wellness apps (#4, 34%).⁵⁷ Adding regular new app content will help prevent users becoming bored, and give them a reason to return. It's also a powerful tool for attracting lapsed users back again (23%, #2 reason for re-engagement).⁵⁸

4.3 Fix technical issues, and set the right expectations

The primary causes of frustration and churn are technical issues that create friction and disrupt an otherwise smooth user experience.⁵⁹ In fact, disengaged users cite “the app being redesigned for easier use” as the fourth most persuasive factor that could win them back⁶⁰ – while “fixing technical issues” is joint sixth.

You can see a full list of the most common app user frustrations in Figure 13, which includes challenges relating to the app itself (e.g. using too much mobile data), plus what the app actually allows people to do (e.g. extra functionality compared to the website).

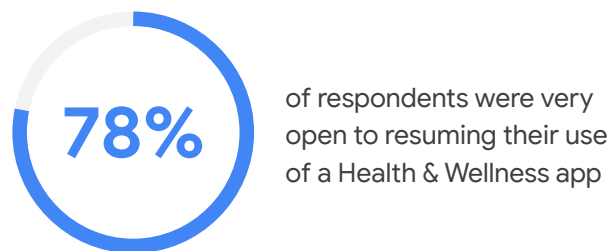
Those examples suggest that a closer alignment between marketing, web and app development teams may be beneficial to ensure greater consistency between not only the web and app, but also people's expectations around functionality before they download it. As mentioned previously, adding previews and tutorials to your App Store / Play Store listing can help here.



4.4 Build features that enhance the user experience, and make sure users can find them

As discussed earlier, creating – and clearly signposting – features that allow users to customise their experience is critical for engagement. Indeed, these features are as valuable for winning back people at risk of churn, as they are for cultivating closer relationships with **EMBED** users. A top ten frustration among disengaged app users is “Can’t personalise enough” (ranked #6).⁶¹

Comfortingly, more than three quarters (78%⁶²) of respondents were very open to resuming their use of a Health & Wellness app, or reinstalling it altogether. That said, once updates, improvements or innovations have been made, they need to be told about them. Two ways you can do this is are by incentivising conversations among peer networks, and also encouraging users to review your new updates on the App Store / Play Store (both ranked as #5 and #9 re-engagement drivers respectively).⁶³



There are also a few practical things an app can do to encourage users to get the most out of it: engage with tutorials/previews to set clear expectations from the outset; personalise their notifications; and build strong networks.

4.5 Encourage users to engage with tutorials / previews to set expectations from the outset

As mentioned earlier, app previews and tutorials in the App Store / Play Store help set user expectations before an app is downloaded. Including these within the app itself can help clarify what’s available, and show how it all works. Encouraging users to engage with this type of content at **ONBOARD** will also reduce ‘first use’ frustrations.

4.6 Show users how to personalise their notifications for a better experience

Again, as touched on before, enabling and encouraging app personalisation can also help reduce frustrations and prevent churn. Bear in mind though, while users appreciate personalisation, they may not always know how to do it in a way that best suits their needs. In fact, “too many notifications” emerged as a key point of frustration among those who disengaged (ranked #2).⁶⁴ Be sure to show users how they can tailor your app (especially their notifications), as this will improve their overall experience and help them get the most out of it.

4.7 Encourage users to build strong social networks

The accountability, community and competition of social connections are all powerful motivational forces that encourage users to return to the app, and progress towards their goals. In the fitness sub-vertical especially, apps should develop features that push these types of social connections, and the building of strong social networks.

Social features help drive app use and prevent churn (the joint #5 frustration).⁶⁵ They're also an effective way to bring lapsed users back into the fold – with 20% of respondents saying they'd reinstall an app if a family member or friend started using it again.⁶⁶

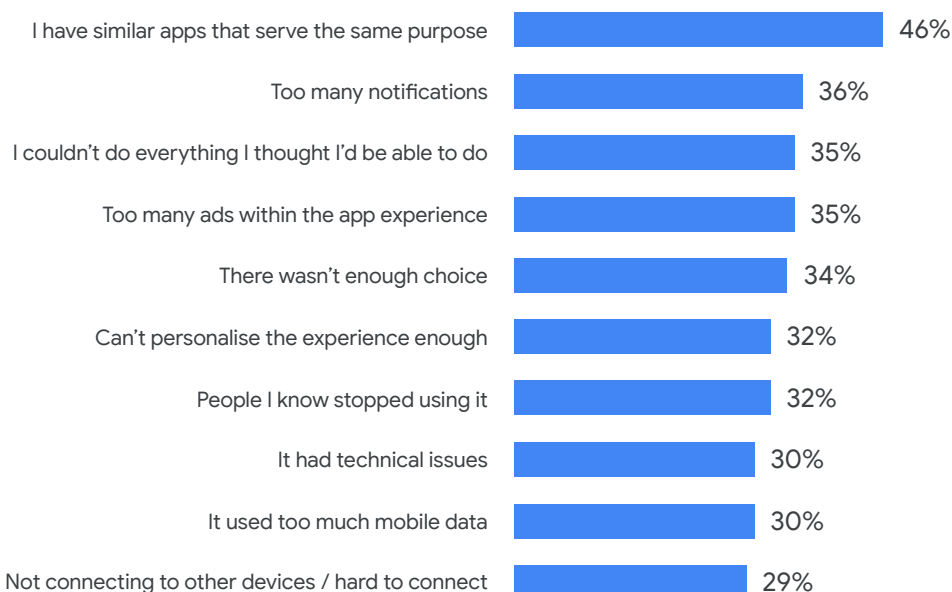


Fig 13. Top 10 frustrations with using a Health & Wellness app among all who disengaged after some usage⁶⁷

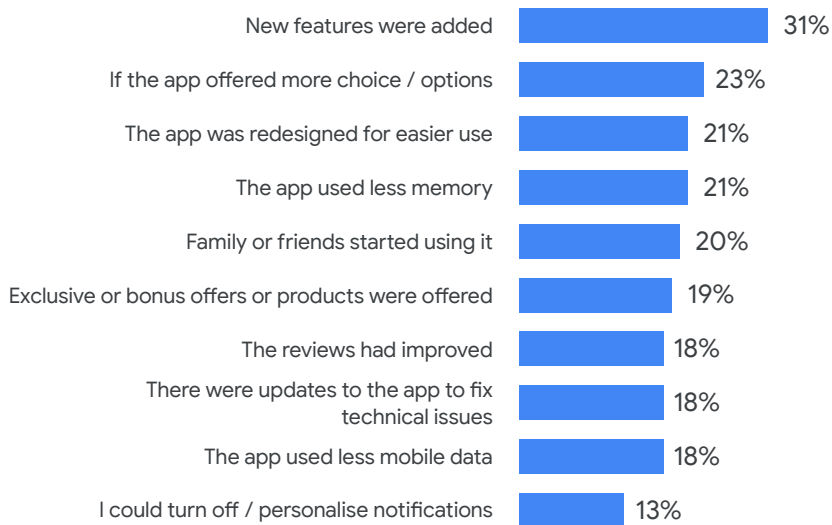


Fig 14. Top 10 reasons to re-engage with a Health & Wellness app among all who disengaged after some usage⁶⁸

Reducing disengagement also delivers benefits beyond the purely financial. Compared to **ENGAGED** users, app users who disengage are far less likely to refer the app to others. This is reflected in their Net Promoter Score dropping into the negative ‘detractor’ zone. Given that word of mouth is such an important driver, this presents a subsequent risk to user acquisition, and brand reputation more generally.

- **ENGAGE** users
- Disengaged after some usage

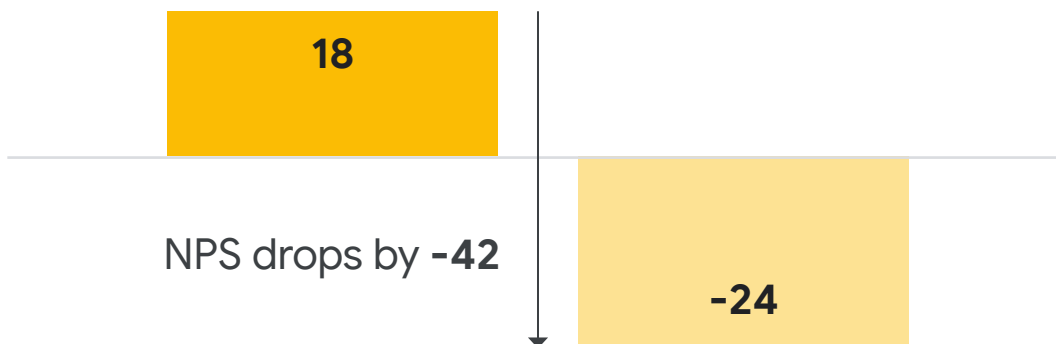


Fig 15. App / brand loyalty as measured by Net Promoter Score (NPS) among ENGAGE users and those who disengaged after some usage⁶⁹

05

CONCLUSION: Final thoughts

There's no doubt that apps are a strategically important way for Health & Wellness brands to find new users, strengthen existing customer relationships, and drive revenue. Within the current environment, user consideration and adoption within the category is high, and this looks set to continue. To use a bricks and mortar analogy, the footfall is there and it's increasing.

Arguably the most compelling story from our study is the clear and demonstrable benefits that can be gained by making an app that's 'vital' for your users. Many businesses talk about putting the needs of users first or building customer-centric flows. Yet an overriding message coming out of the research is to go *beyond* that, and focus on how to make your app something users can't do without.

Fundamentally, human needs are inherently ingrained, and therefore slow to evolve. From our research, it's clear that Health & Wellness app users expect their experience to deliver on two primary needs, which should form the basis of your consumer-centric strategy.



Firstly, they expect the app to motivate and challenge them to progress on their journey towards a better and healthier version of themselves.



Secondly, they expect a frictionless experience that puts them in control, and takes the hassle out of meeting and maintaining their goals.

While these two underlying need states will remain constant for the Health & Wellness app user (at least in the midterm), the same cannot be said for how your app actually delivers and achieves them. In other words, your app's UX, design, features etc., should constantly evolve. Developers should be mindful that ticking all the 'Advanced level features' on a scorecard by no means represents the end of the road. There is no finish line. The recommendations set out here should be seen as a starting point, and a 'proof of value' in investing in app development and marketing.

Consumers are quick to lapse from apps which don't differentiate themselves from the competition, and their expectations are continually being reset by their interactions with apps within the category and beyond. As such, developers should always be challenging themselves to think 'what's next?' – and looking to fulfil people's underlying needs in smarter, slicker and more relevant ways.

06

Appendix

6.1 Introduction to our methodology

Google has worked with research and strategy consultancy, MTM, in a multi-stage project. The narrative in this report was produced from a combination of all these evidence sources.

An initial scoping stage involved synthesising third-party sources and conducting a market sizing omnibus research survey, to inform the design of primary research workstreams. Exploratory qualitative research techniques were used to uncover insights that were later validated in robust survey data – notably, including the app user engagement model.

6.2 Qualitative research methodology

We held conversations with **key business decision makers** across global markets, to gather perspectives on what best-in-class apps look like and how to support app success. Participants were in roles such as: Head of Growth, Head of Digital Commerce, Head of Global Expansion, Senior Product Manager, Senior Developer, Senior Strategy Manager. We are very grateful for their participation. Permission has been given for use of attributed quotes.

We then ran **consumer connects** with 32 people across the UK, US and France. Each connect began with a three-day digital journal task where participants captured their app usage and engagement. This included a directed task of downloading a new app they were interested in, to capture onboarding. After the journal, we ran depth interviews to dive into app usage, and how experiences differed across apps and at each stage of the user journey.

6.3 Behavioural science interpretation

We worked with Dr Nick Southgate to add a **behavioural science lens** to our findings. As one of the leading practitioners in the emerging field of applied behavioural thinking, Nick looks to use the insights and understanding gained in behavioural sciences in combination with the creative and communication expertise of a marketer and advertising thinker. He also participated in our 'consumer connects' and subsequent analysis to bring his unique perspective to our outcomes.

6.4 Quantitative research methodology

A **20-minute online survey** in six markets (UK, US, Germany, France, Japan, India) collected data from n=5,765 consumers in 3 Health & Wellness sub-verticals: Exercise, Nutrition, Improve Health & Wellbeing. We collected a robust sample for each stage of the model (approx. n=80 per stage, per subvertical, per market): **DISCOVER** i.e. those considering which app to download; **ONBOARD** i.e. those who've downloaded an app in the last three months; **ENGAGE** users i.e. those who've used an app for at least 1 month (we then identified **EMBED** users from within **ENGAGE** users); **DISENGAGED** i.e. those who've previously used an app but stopped using it. Each respondent answered a relevant section of the online survey.

The Scorecards for this project have been developed through a blend of art and science. MTM adapted the bespoke Kano analysis technique as the 'science' behind our scorecard analysis based on current consumer perceptions of existing market features. The 'art' came in interpreting these results, and overlaying knowledge gleaned from within the Google App Developer / Marketing community, and learnings from our qualitative business decision maker conversations – meaning a small number of items were reclassified. We also used the Maximum Difference (MaxDiff) statistical technique, which asks respondents to trade-off between different factors. We used MaxDiff twice: to establish which touchpoints are most influential when deciding which app to use, and also to understand which frustrations / triggers drive churn.



Footnotes

- 1 MTM Survey Question: How often do you use the app? Thinking about a typical day, how many times a day would you say you use the app? Which of the following do you do on the app? And on average, how much do you spend each time you pay for content / premium features on the app? Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,062), EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 2 Mind, Nov 2020: <https://www.mind.org.uk/news-campaigns/news/mind-warns-of-second-pandemic-as-it-reveals-more-people-in-mental-health-crisis-than-ever-recorded-and-helpline-calls-soar/>
- 3 MTM Survey Question: How long have you spent researching which app to download? Base: 2021 Health & Wellness - DISCOVER - Consumers currently considering downloading a Health & Wellness app (n=1,449)
- 4 MTM Survey Question: Which of the following frustrations, if any, have you experienced when using the app? Base: 2021 Health & Wellness - Disengaged from a Health & Wellness app after some usage (n=1,060)
- 5 See Appendix for our research methodologies.
- 6 MTM Survey Question: Which of the following best describes how you feel about the app? Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,249)
- 7 MTM Survey Questions: How often do you use the app? Thinking about a typical day, how many times a day would you say you use the app? Which of the following do you do on the app? Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,062), EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 8 MTM Survey Question: How likely are you to recommend the app to someone else (e.g. friends, family, colleague)? NPS is calculated by taking the Promoter score (% responding 9-10 out of 10 where 10 is high) and subtracting the Detractor score (% responding 0-6 out of 10 where 0 is low) Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,062), EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 9 MTM Survey Question: MTM Survey Question: And on average, how much do you spend each time you pay for content / premium features on the app? Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month & who have spent money on content / premium features (n=176); EMBED users - rate app is vital, I don't know what I'd do without it and who have spent money on content / premium features (n=61)
- 10 MTM Survey Question: Thinking about all the apps you use, not just the apps we've been asking you about, what would you say the benefits of apps generally are? Base: 2021 - Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,249)
- 11 MTM Survey Question: In which of the following ways, if any, have you been made aware of apps you may be interested in downloading? / How important will each of these be in making your final decision to download an app? Classifications based on quadrant analysis of touchpoints scoring above or below average for each question. Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 12 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 13 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 14 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 15 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 16 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 17 MTM Survey Question: How long have you spent researching which app to download? Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 18 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 19 MTM Survey Question: Which of the following frustrations, if any, have you experienced when using the app? Base: 2021 Health & Wellness - Disengaged from a health & Wellness app after some usage (n=1,060)
- 20 MTM Survey Question: Which of the following frustrations, if any, have you experienced when using the app? Base: 2021 Health & Wellness - all who disengaged during ONBOARDING (n=970)

- 21 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 22 MTM Survey Question: How important will each of these be in making your final decision to download an app? (Scores = Net very important/ Quite Important) Base: 2021 Health & Wellness - DISCOVER - currently considering downloading a Health & Wellness app (n=1,449)
- 23 MTM Survey Question: How likely are you to recommend the app to someone else (e.g. friends, family, colleague)? NPS is calculated by taking the Promoter score (responding % 9-10 out of 10 where 10 is high) and subtracting the Detractor score (% responding 0-6 out of 10 where 0 is low) Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037), all who disengaged during ONBOARDING (n=970)
- 24 MTM Survey Question: Did you experience any of the following frustrations when you first logged in/ registered with the app? Base: 2021 Health & Wellness - all who disengaged during ONBOARDING (n=970)
- 25 MTM Survey Question: Did you experience any of the following frustrations when you first logged in/ registered with the app? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 26 MTM Survey Question: Did you experience any of the following frustrations when you first logged in/ registered with the app? Base: 2021 Health & Wellness - all who disengaged during ONBOARDING (n=970)
- 27 MTM Survey Question: Did you experience any of the following frustrations when you first logged in/ registered with the app? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 28 MTM Survey Question: Did you experience any of the following frustrations when you first logged in/ registered with the app? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 29 MTM Survey Question: Which of the below best describes how long the set-up process felt? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 30 MTM Survey Questions: How long in minutes did it take to set up the app? Which of the below best describes how long the set- up process felt? - Those who said 'too slow/ quite slow' were significantly more likely to respond with 15 minutes+, than those who said the process was quick/ as expected.
- 31 MTM Analysis Technique: Classified as 'Excitement' factors and therefore Intermediate level features in Google's Scorecard, via MTM's adapted KANO analysis. C7. A - How would you feel if the following features were all available when setting up the app? B - How would you feel if the following weren't available when setting up the app? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 32 MTM Qualitative interviews with consumers
- 33 MTM Analysis Technique: Classified as 'Indifferent' factors in MTM's adapted KANO analysis. C7. A - How would you feel if the following features were all available when setting up the app? B - How would you feel if the following weren't available when setting up the app? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 34 MTM Analysis Technique: Classified using MTM's adapted KANO analysis. C7. A - How would you feel if the following features were all available when setting up the app? B - How would you feel if the following weren't available when setting up the app? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 35 MTM Survey Question: MTM Survey Question: Which of the below best described why you used the app? What needs did it meet? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 36 MTM Survey Question: Which of the below best describe why you use the app? What needs does it meet? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 37 See Figure 11. Top 10 features used in Health & Wellness apps among ENGAGE and EMBED users
- 38 MTM Analysis Technique: Classified as 'Delight' factors and therefore Advanced level features in Google's Scorecard, via MTM's adapted KANO analysis. MTM Survey Question: How would you feel if the following features were included? / How would you feel if they weren't included? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 39 See Figure 11. Top 10 features used in Health & Wellness apps among ENGAGE and EMBED users
- 40 See Figure 11. Top 10 features used in Health & Wellness apps among ENGAGE and EMBED users
- 41 MTM Survey Question: And which of these features did you use when setting up your app? Base: 2021 Health & Wellness - ONBOARD users - who completed ONBOARDING (n=1,037)
- 42 See Figure 11. Top 10 features used in Health & Wellness apps among ENGAGE and EMBED users
- 43 MTM Survey Question : Which of the below best describe why you use the app? What needs does it meet? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 44 MTM Analysis Technique: Classified as 'Delight' factors and therefore Advanced level features in Google's Scorecard, via MTM's adapted KANO analysis. Question: How would you feel if the following features were included? / How would you feel if they weren't included? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)

- 45 MTM Analysis Technique; Classified as 'Excitement' factors and therefore Intermediate level features in Google's Scorecard, via MTM's adapted KANO analysis. Question: How would you feel if the following features were included? / How would you feel if they weren't included? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 46 MTM Analysis Technique; Classified as 'Delight' factors and therefore Advanced level features in Google's Scorecard, via MTM's adapted KANO analysis. Question: How would you feel if the following features were included? / How would you feel if they weren't included? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 47 MTM Analysis Technique; Classified as 'Excitement' factors and therefore Intermediate level features in Google's Scorecard, via MTM's adapted KANO analysis. Question: How would you feel if the following features were included? / How would you feel if they weren't included? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 48 See Figure 11. Top 10 features used in Health & Wellness apps among ENGAGE and EMBED users
- 49 MTM Analysis Technique; MTM's adapted KANO analysis. Question: How would you feel if the following features were included? / How would you feel if they weren't included? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 50 MTM Survey Question: MTM Survey Question: Which of the below best described why you used the app? What needs did it meet? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 51 MTM Survey Question: Which of the below best describe why you use the app? What needs does it meet? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 52 MTM Survey Question: Which of the below best describe why you use the app? What needs does it meet? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 53 MTM Survey Question: And which of these features do you ever use in the app? Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,249)
- 54 MTM Analysis Technique; Classified in Google's Scorecard, via MTM's adapted KANO analysis. Question: How would you feel if the following features were included? / How would you feel if they weren't included? Base: 2021 Health & Wellness - EMBED users - rate app as "vital, I don't know what I'd do without it" (n=187)
- 55 MTM Survey Question: Have you ever stopped using the app in the past or even uninstalled it? Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,249)
- 56 See Figure 13. Top 10 frustrations with using a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 57 See Figure 14. Top 10 reasons to re-engage with a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 58 See Figure 14. Top 10 reasons to re-engage with a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 59 See Figure 13. Top 10 frustrations with using a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 60 See Figure 14. Top 10 reasons to re-engage with a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 61 See Figure 13. Top 10 frustrations with using a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 62 MTM Survey Question: Would you reconsider reinstalling/ downloading the app in the future? Base: 2021 Health & Wellness - Disengaged from a Health & Wellness app after some usage (all) (n = 2,030)
- 63 See Figure 14. Top 10 reasons to re-engage with a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 64 See Figure 13. Top 10 frustrations with using a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 65 See Figure 13. Top 10 frustrations with using a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 66 See Figure 14. Top 10 reasons to re-engage with a Health & Wellness app among all who disengaged from a Health & Wellness app after some usage.
- 67 MTM Survey Question: Which of the following frustrations, if any, have you experienced when using the app? Base: 2021 Health & Wellness - Disengaged from a health & Wellness app after some usage (n=1,060)
- 68 MTM Survey Question: Would any of the following make you reinstall / download the app in the future? If... Base: 2021 Health & Wellness - Disengaged from a Health & Wellness app after some usage (all) (n = 2,030)
- 69 MTM Survey Question: How likely are you to recommend the app to someone else (e.g. friends, family, colleague)? NPS is calculated by taking the Promoter score (% responding 9-10 out of 10 where 10 is high) and subtracting the Detractor score (% responding 0-6 out of 10 where 0 is low) Base: 2021 Health & Wellness - ENGAGE users - currently use a Health & Wellness app & have done for more than 1 month (n=1,249); Disengaged from a Health & Wellness app after some usage (n=1,060)

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