



# VR in health: the patient view

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# Some key questions we were curious about



**WHAT'S THE CURRENT  
LEVEL OF VR  
EQUIPMENT AT HOME?**



**WHAT'S THE CURRENT  
USE OF VR FOR  
HEALTH?**



**WHAT ARE THE USE CASES  
FOR VR IN HEALTH PEOPLE  
ARE INTERESTED IN?**

# The patient Trendscoping study: 10,500 respondents in 5 countries



- 5 countries, 10,500 respondents
- 3,000 respondents in US and in China
- 1,500 respondents in UK, Germany, Japan
- Field work in Q3 2022



- Nationally representative by age, gender, region, ethnicity (US)
- Information on health diagnoses captured
- “Free-fall” i.e. no quota on specific health condition



- 20-min online questionnaire
- In focus: emerging behaviors in health
- Digital health, VR, AI, digital therapeutics (DTx)
- Empathy/discrimination, caregivers, sources of health information

**THE 'NOW':  
VR  
OWNERSHIP  
AMONGST  
CONSUMERS**



Which age  
group is  
most likely to  
...

...report owning or having access to a VR headset  
at home? (=household access)



GEN Z

18 to 26 yo



MILLENNIALS

26 yo to 41 yo



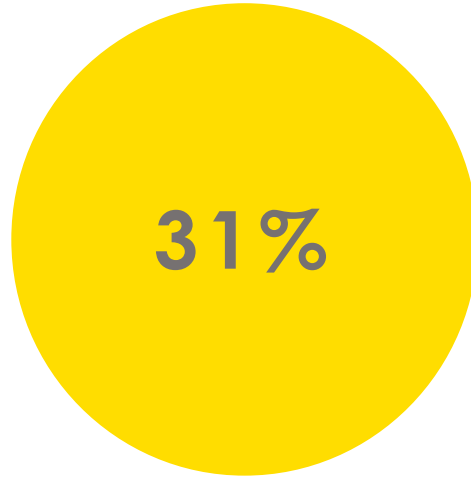
GEN X

42 yo to 60 yo

Q: Which device(s) do you currently own or have access to in your household, or are you planning to buy within the next 12 months?

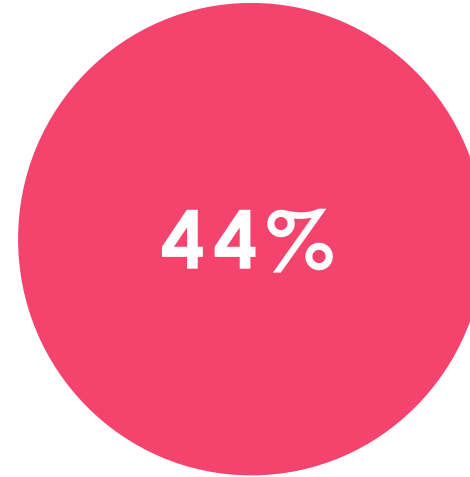
## % who report owning or having access to a VR headset at home (=household access)

Households with Millennials ahead of the curve



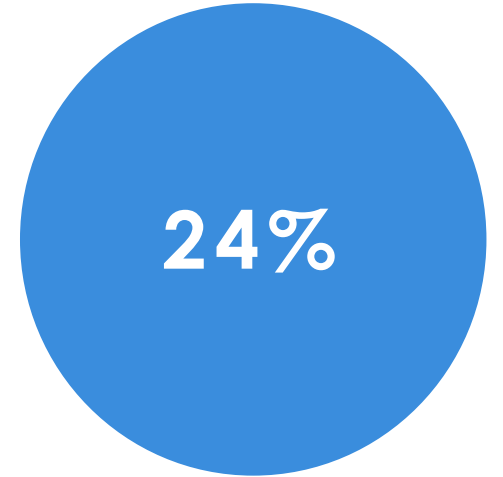
### GEN Z

- With maybe more interest, but less purchasing power (20% students)
- Most likely to be living w/ parents (36%)



### MILLENNIALS

- With more purchasing power (85% in employment)
- With biggest households: most likely to live with other people (80%)



### GEN X

- Most likely to live with teenagers or young adults (42%)



# 'Data portrait' of people with VR headset at home (1/2)

## DEMOGRAPHICS

- Men (61%), 35 y.o. as median age
- Living in city (64%)
- Living w/ partner 57%, with children/teenagers. (<18 y.o) 70%

## HEALTH

- Satisfied with own health (88% 'good health')
- Important to maintain healthy lifestyle (91%)
- Open to talk about mental health or to seek help for mental health (~92%)



# ‘Data portrait’ of people with VR headset at home (2/2)

## INTERESTING POINTS

- Good understanding of Digital therapeutics (39%) or heard of it (33%)
- Caregiver to someone with a chronic condition(60%), living with them (93%)
- Very engaged in self-monitoring: 61% track their activity levels (e.g., steps), 54% track their sleep, 57% use an app for mindfulness or stress...
- More likely to have used video consultations with HCP (71% already tried) or chatbots/symptoms triage (65%)\*

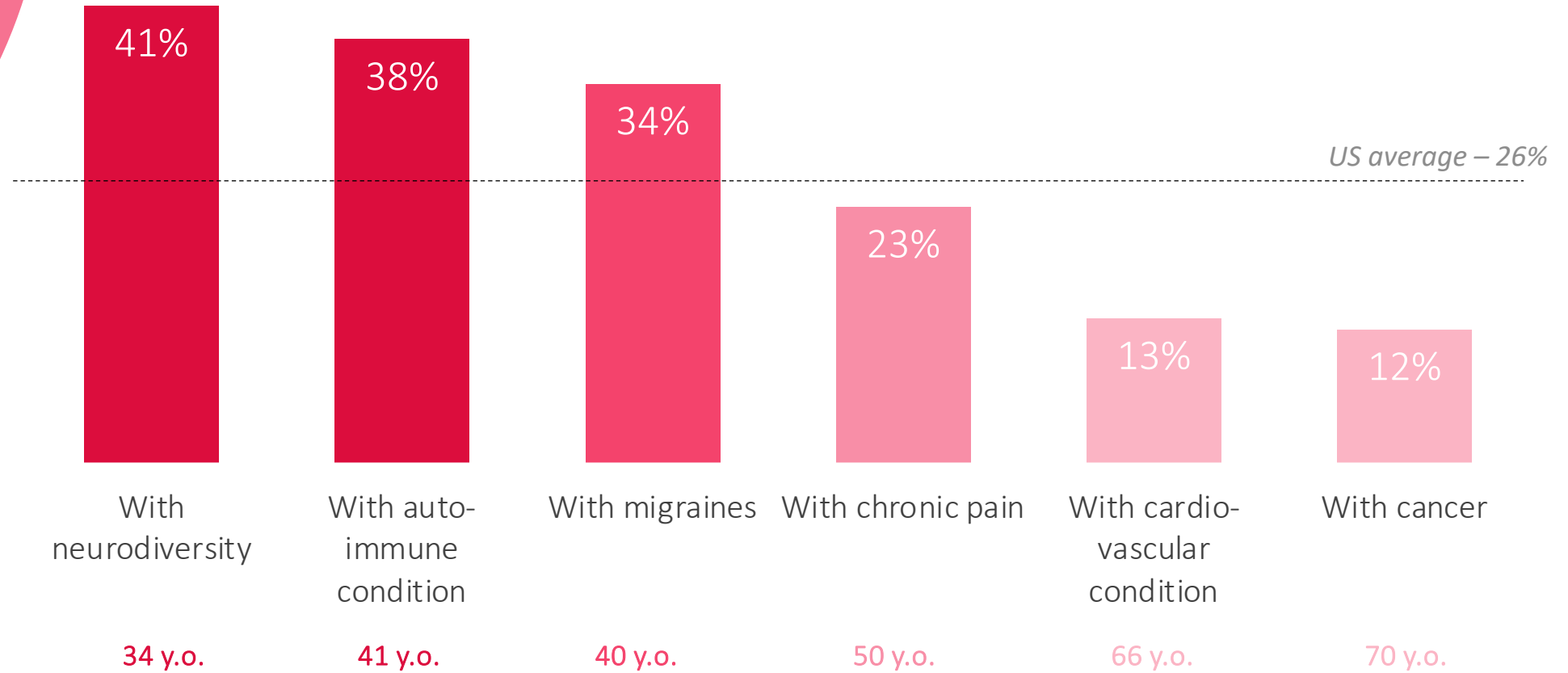
\* Note: study done before chatGPT launch





# Another lens: key patients groups

% of people with the condition who report owning or having access to a VR headset at home (=household access)



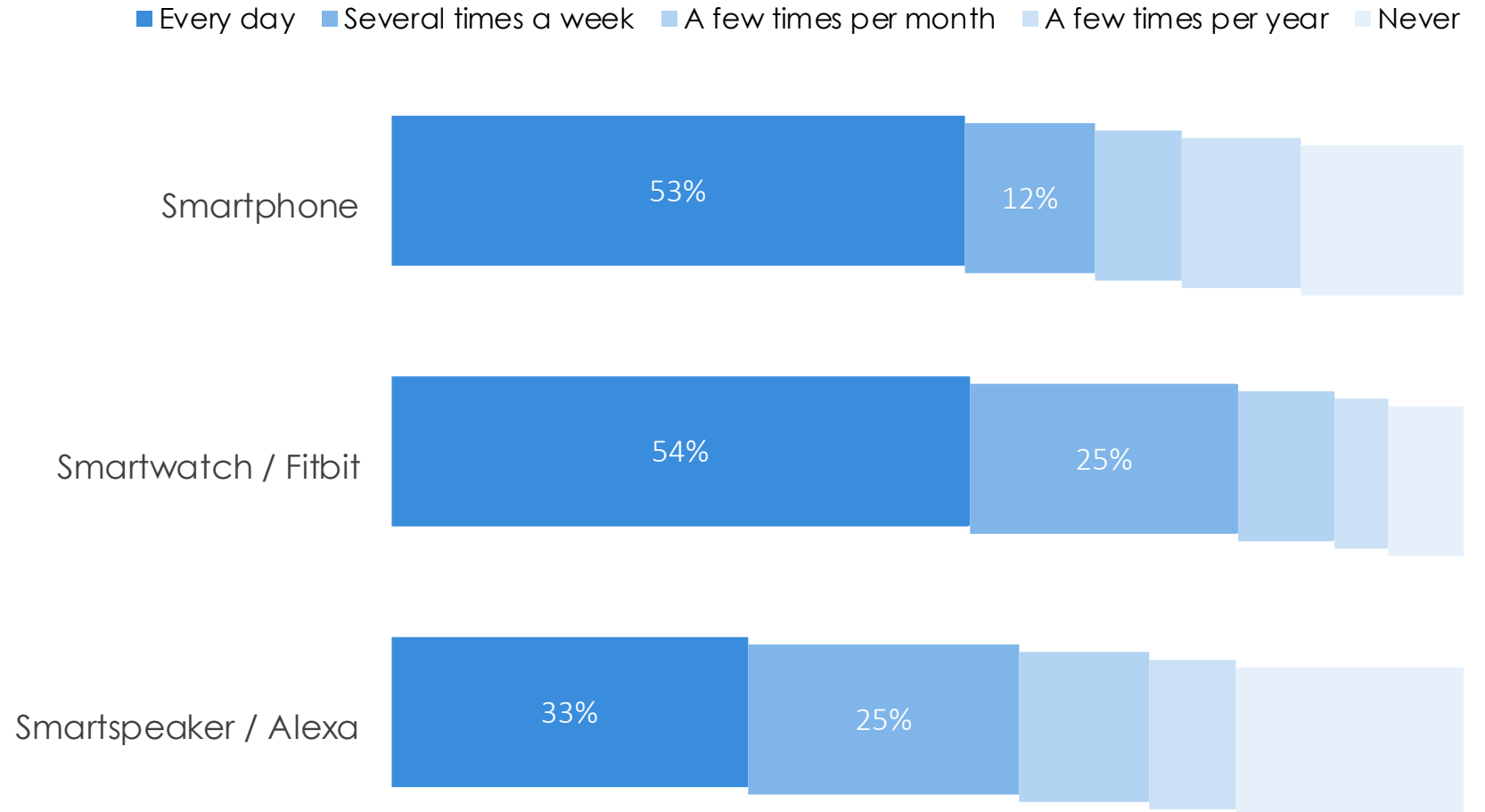
Q: Which device(s) do you currently own or have access to in your household, or are you planning to buy within the next 12 months? | US data

THE 'NOW':  
USE OF VR  
FOR HEALTH  
PURPOSES



For context:  
frequency  
of use for  
tech  
devices  
for health

## Frequency of use of different devices to help manage one's health



Q: How often do you use the following device(s) to help you manage your health? For instance, it could be to use a health app, to talk to a health professional via chat message or video call, to get reminders on your medication... Base: all respondents having access to the device at home | US data



...Using it every day or several times per week?

How often do people with a VR headset at home use it for health purposes?

70%

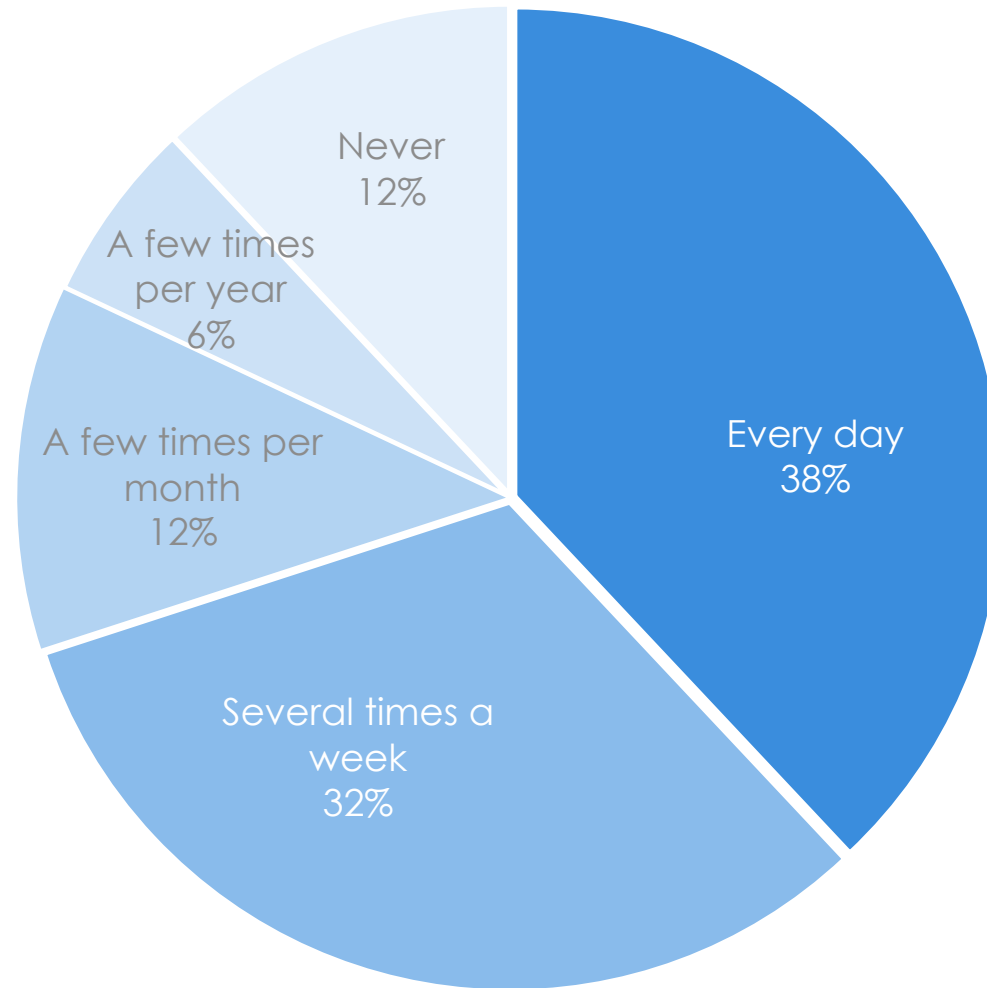
51%

37%

Q: How often do you use the following device(s) to help you manage your health? For instance, it could be to use a health app, to talk to a health professional via chat message or video call, to get reminders on your medication... Base: all respondents having access to the device at home | US data

Very  
frequent  
usage for  
most users

## Frequency of use of VR headset to help manage one's health



Q: How often do you use the following device(s) to help you manage your health? For instance, it could be to use a health app, to talk to a health professional via chat message or video call, to get reminders on your medication... Base: all respondents having access to the device at home | US data

EXPLORING  
USE CASES:  
THE  
POTENTIAL  
OF VR IN  
HEALTH





## VR for mental health

43%

of patients with a chronic condition said their condition had a **large impact** on their mental health

And caregivers too!

72%

said that caregiving has negatively impacted their mental health



Which use  
case in  
mental health  
holds the  
most appeal?

### 3 use cases tested in our survey



COGNITIVE  
TRAINING &  
EVALUATION

For cognitive training and  
evaluation, e.g. for better  
focus, memory, or  
prevention of memory loss



COPING WITH  
PHOBIAS OR PTSD

To help cope with  
phobias or PTSD



ANXIETY, PANIC  
ATTACKS

To help with mental  
health, e.g. with anxiety  
and panic attacks

Q: There are more and more applications for Virtual Reality in Health. Which ones would you be ready to try, if you or your loved ones had a need for it

Which use case in mental health holds the most appeal?

### 3 use cases tested in our survey



**23%**

For cognitive training and evaluation, e.g. for better focus, memory, or prevention of memory loss



**15%**

To help cope with phobias or PTSD



**25%**

To help with mental health, e.g. with anxiety and panic attacks



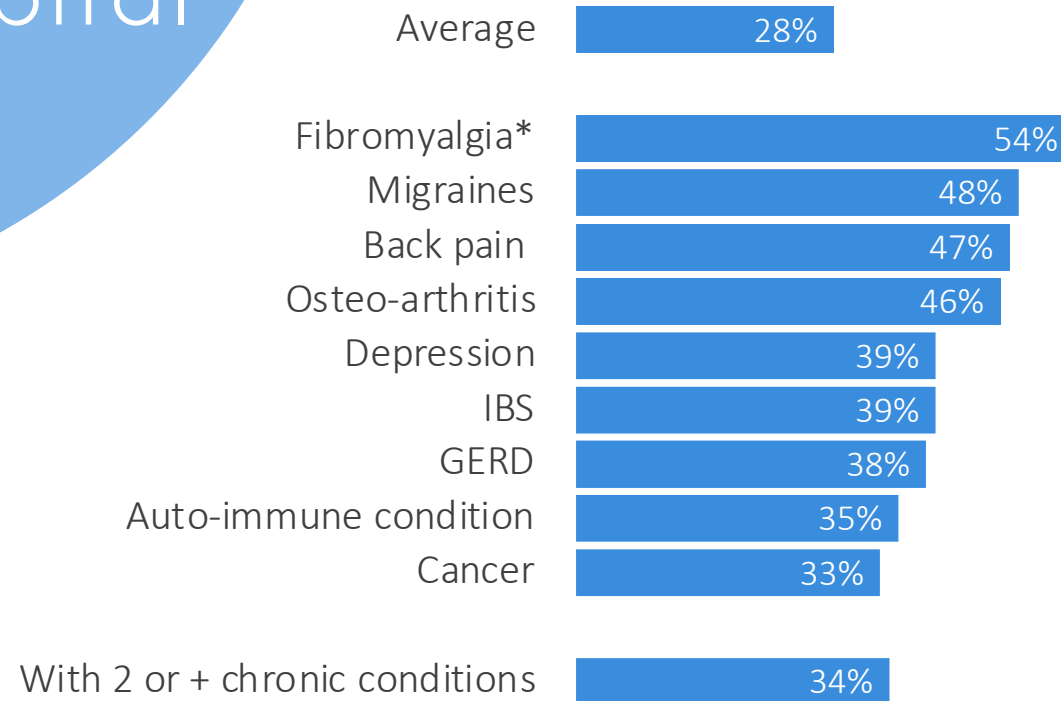
# VR for pain management



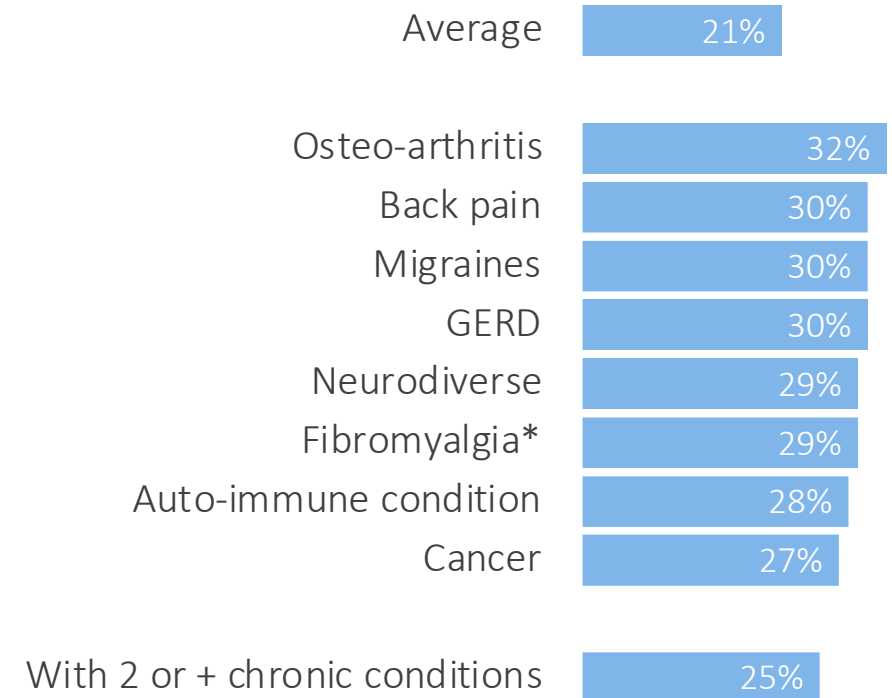
More  
interest for  
at-home  
settings  
than in  
hospital

## % of people who would be ready to try VR in the following use cases

For use **at home**, to help manage **chronic pain**



For **use at the hospital / clinic** during **painful or stressful procedures** (e.g. chemotherapy, minor surgery)



Q: There are more and more applications for Virtual Reality in Health. Which ones would you be ready to try, if you or your loved ones had a need for it | US data |

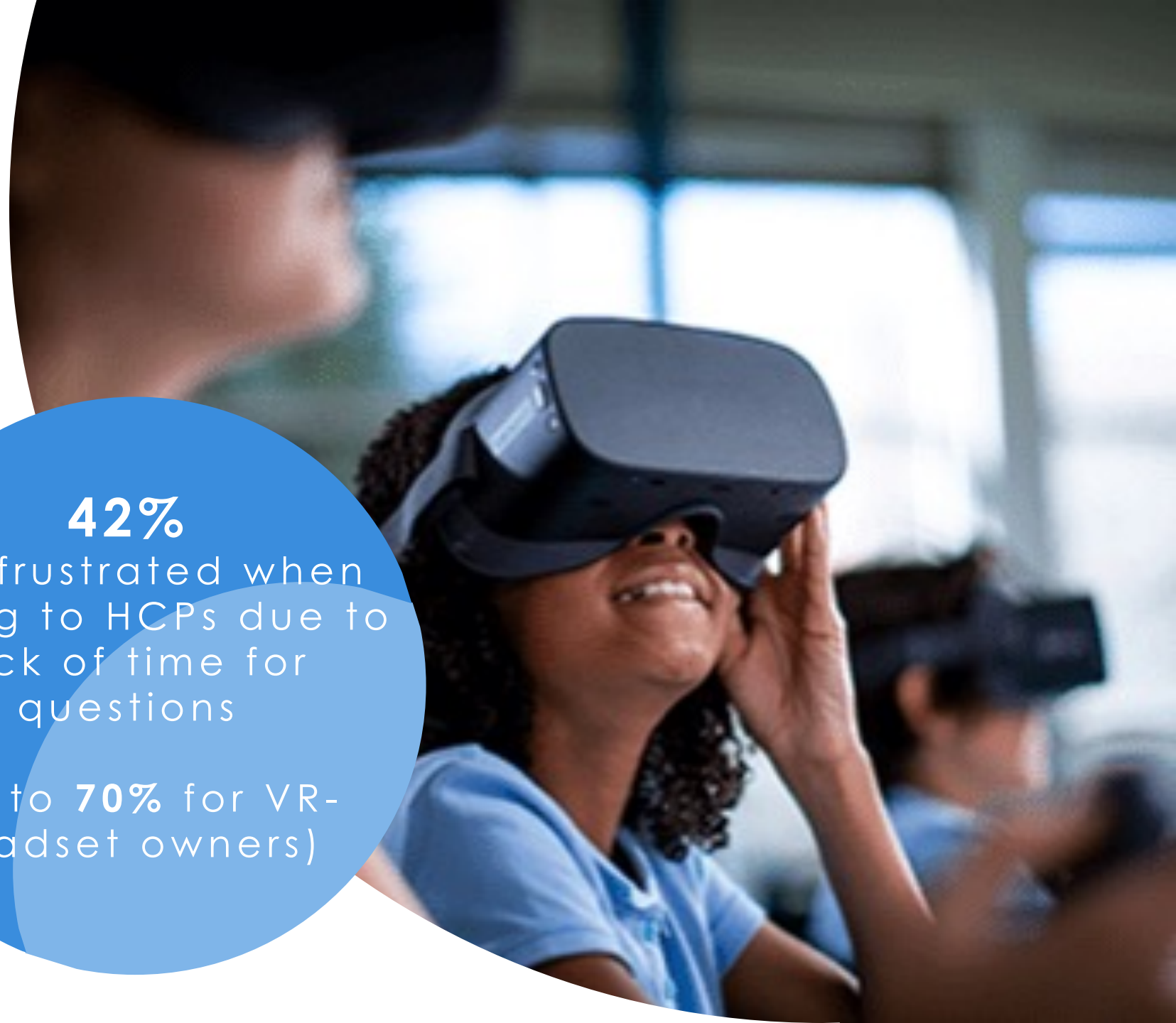
\* indicates a small sample (50 to 100 respondents)

# VR as a medium of information for patients

**42%**

feel frustrated when  
talking to HCPs due to  
lack of time for  
questions

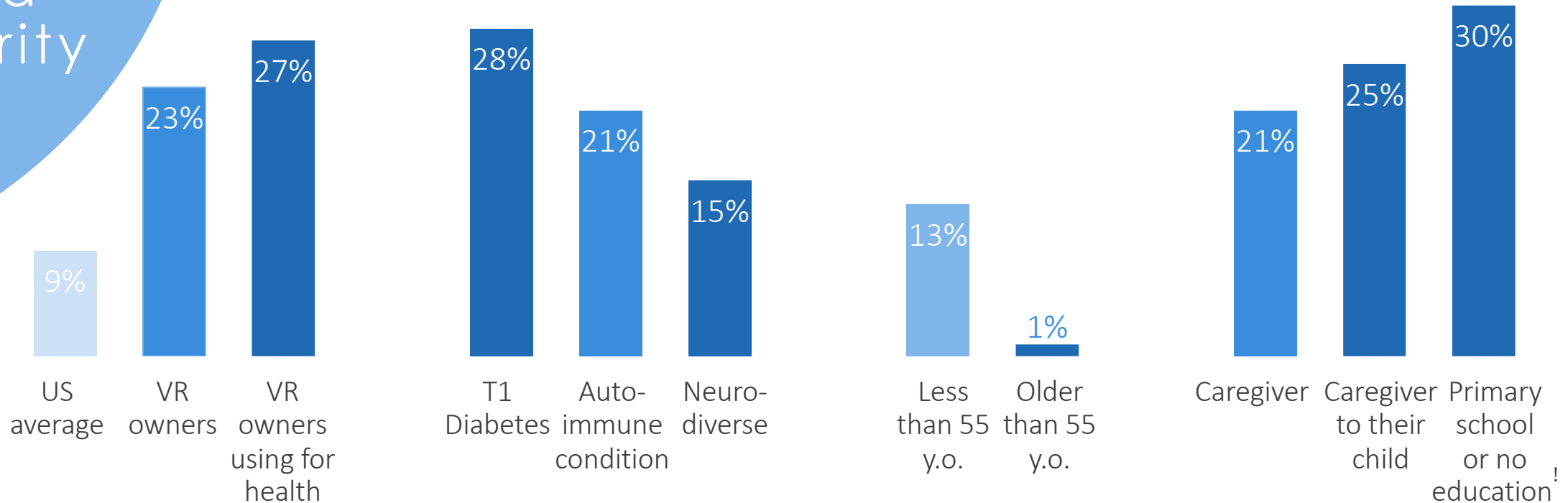
(up to **70%** for VR-  
headset owners)





VR as a preferred format to receive information for a minority

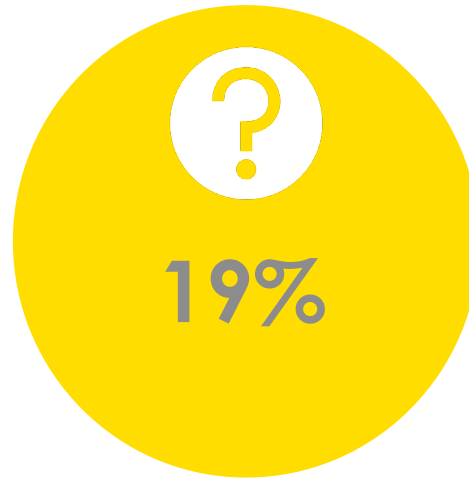
## % of people putting VR/video games as one of the 3 preferred formats for health information



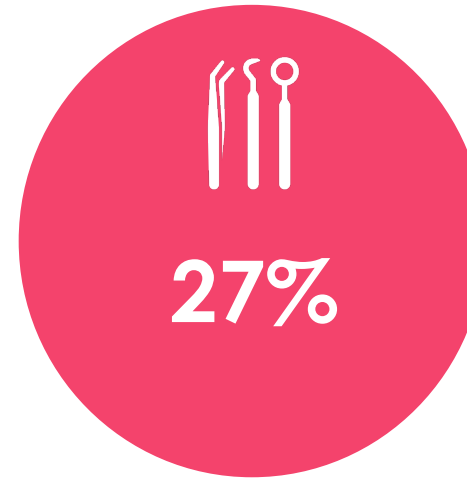
Q: What format do you prefer to receive your health information in? Please select your Top 3 answers | US data | ! indicates a very small sample (~50 respondents)

Which use case holds the most appeal?

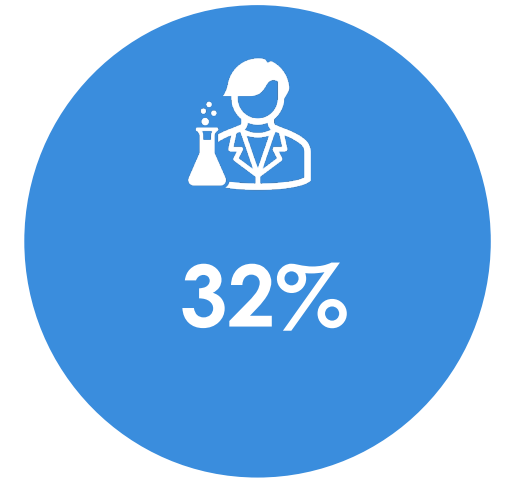
### 3 use cases tested in our survey



To be educated about my chronic condition(s), how the medication works in my body and how the condition may progress in the future



To understand how a medical procedure (e.g. a surgery or an exam) is going to happen



To review my test results with my doctor and visualize what the results are

## Some key take-aways

1. **Not a 'niche tech' anymore** - The level of consumer equipment for VR headset is already reaching significant levels
2. **Not only for entertainment** - People with access to VR headset at home already use them for health purposes in a very frequent manner → would need to investigate more in which use cases
3. **Target the right patient groups** - Huge variations of interest for VR amongst age groups, so best to prioritise use cases for patient groups with lower age median
4. **For therapeutic use at home and/or in clinical settings**, but also an opportunity as **a patient education tool**



For the forward-thinkers in health

FORESIGHT ● INNOVATION ● STRATEGY ●

Any questions or suggestions for our next wave of research?  
Don't hesitate to reach out!

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LinkedIn  
QR code

DANKE!  
THANK YOU!  
MERCI!  
GRAZIE!  
GRACIAS!  
DANK JE WEL!

