DIGITAL HEALTH
IN THE UK
NATIONAL ATTITUDES AND BEHAVIOUR RESEARCH

Summer 2022

ORCHA

Digital health in the UK

Digital has been an area of focus in the NHS for a number of years, and is a key feature of the NHS Long Term Plan.[1] The imminent publication of the first NHS Digital Health Plan further recognises its role in transforming the NHS, which is expected to build on the What Good Looks Like Framework.[2] The Fuller Stocktake report published in May 2022 also emphasises the importance of digital transformation in primary care.[3]

We recognise that to build a digital transformation plan, we must first understand what the current situation is. For the second year in a row, ORCHA has commissioned OnePoll to conduct an independent online poll of 2,000 UK residents, to better understand the nation's attitudes and behaviours where digital health is concerned.[4] Questions asked of the public covered topics such as what they think of digital health, how they are using it, and where they are finding it.

The study has been repeated one year on, using the same methodology, to gain an accurate picture of the situation in the UK today, and whether anything has changed in the last 12 months.

In this second iteration of the poll, we covered the same core questions, to understand what impact digital health is making to people's health, and added some more in-depth questions about digital mental health.

The research looked in depth at regions across the UK. This insight report is produced to share the key findings.

Patient attitudes to digital health

In order to take pressure off the healthcare system, the majority of people in the UK agree that it is vital we all look at new ways to manage our health, including using high-quality health apps. Almost two thirds of people surveyed (**62%**) agree or strongly agree with this statement - in this report we have defined these people as digital health advocates.

62% of people surveyed in the UK agree with this, of which

41% strongly agree
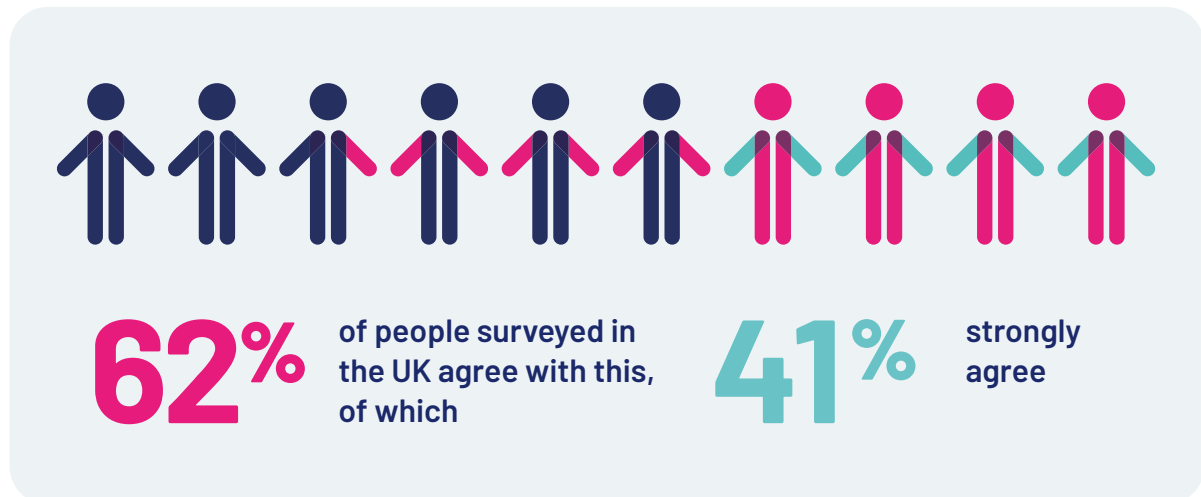
Advocacy varies across the country, with people surveyed in North East (**72%**), London (**69%**), Wales (**68%**), West Midlands (**66%**), Yorkshire & Humber (**64%**) all displaying higher levels of advocacy than the national average, representing areas with a significant pull for digital health.

The appetite for digital health is also strong across all age groups, with seven out of ten people surveyed aged from 18 to 44 being digital health advocates. This level of advocacy doesn't significantly drop amongst older age groups either, with advocacy levels of **57%**, **49%** and **58%** seen amongst those aged 45-54, 55-64, and over 65 years old respectively.

Our previous research revealed the most common reasons people want digital health incorporating into NHS services are:[5]

1. To self-monitor and track symptoms
2. To help change lifestyle, e.g. lose weight or quit smoking, in place of traditional group meetings
3. To alert to a potential health condition, such a skin cancer, which would then be discussed with a doctor
4. To educate on a specific condition or provide support before an appointment
5. To help recover from surgery, such as with specific physiotherapy exercises

82% of people surveyed who have used a health app before agree with the need for digital health, compared to just **43.5%** of those who have not used a health app before. This shows a divide between the activated and the non-activated, when looking at these two groups as a binary distinction rather than a spectrum. This could represent a missed opportunity and a need for health and care professionals to encourage the non-activated to try using digital health, however these results will be influenced by an element of selection bias.

Digital health usage

Across the UK, **47%** of people surveyed have used a health app, a figure that has increased from the **38%** seen in our 2021 poll. This increase indicates that the growth in global health and fitness app downloads seen during the start of COVID has continued.

After downloading a health app, usage reports are also good. Amongst the people who use a health app, **75%** report using it weekly or more often, with almost half of that group using their app daily or more often. This is very significant when compared to usage drop-off statistics for non-health apps, for example **25%** of apps are used only once after being downloaded, and then never used again.[6]

As seen last year, age significantly affects the odds of using a health app. 18-24 year olds are the most activated at **82%** having used a health app. This decreases gradually as age increases, at **34%** for ages 45-54, then reaching its lowest point in the 55-64 age group, where just **20%** of people surveyed have used a health app before. Interestingly, the over 65 age group is more activated than the groups spanning 45-64, with **42%** of people having used digital health.

Of the over 65s that have used health apps, **39%** of them use their app daily or more often, which is higher than all other age groups. In addition, **58%** of those aged 65 and over do support the move to digital health, which is an increase from just over half (**52%**) in 2021. This is consistent with findings from 2021, that the appetite for digital health among the elderly exists, and is even growing, but support is still needed to fully activate these groups.

Last year, we found that there was quite a difference in uptake of digital health amongst men and women surveyed (**36%** usage for women compared to **49%** amongst men). But this year, both of those figures have increased, and while the gap still exists, it has closed slightly with just over half (**51%**) of men now using digital health, with a lower figure at **43%** for women. This indicates a persisting need to increase the use of digital health as a supporting tool in women's services.

Across the UK

**47%** of people surveyed have already used a health app

A measurable difference to outcomes

Amongst people surveyed and who have used a health app, satisfaction is very high. Overall, **85%** of people who have used a health app are satisfied with it, with **36%** of those being very satisfied.

In fact, of major significance, users are not only satisfied with the products they are using, they are also finding digital health helpful in improving their health and wellbeing. Encouragingly, **83%** of people surveyed who have used a health app found it helpful in improving their health and wellbeing, with **35%** of those finding it very helpful.

How helpful was/is the health app for you in improving your health and/or wellbeing?
(Percentage of respondents who have used a health app, n=939)

Not at all helpful – 2%

Not particularly helpful – 14%

Very helpful – 29%

Somewhat helpful – 55%
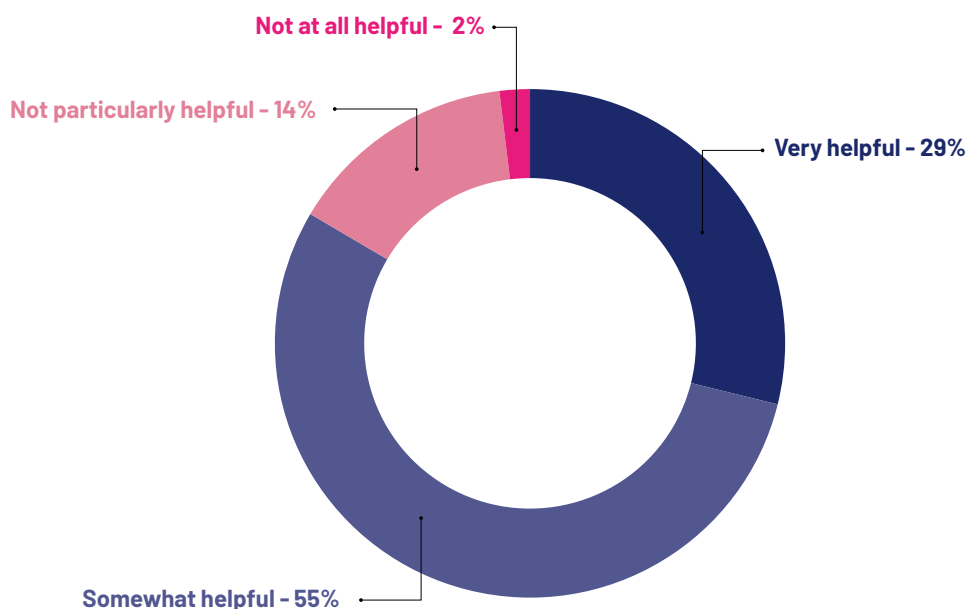
Regional variations call for levelling up

In 2021, we reported that location was one of the biggest factors in whether a person would support or have used digital health. Londoners far outstripped other regions, with more people having used a digital health product than any other region. This year, London remains the most activated region, with **68%** of people surveyed having used digital health, significantly more than other regions. At **35%** and **36%** respectively, East Anglia and West Midlands were regions where the lowest proportion of the population have used a health app.

This data highlights a number of considerations. It indicates that populations in high usage areas, such as London, will be receptive to digital health recommended by the NHS, but with **80%** of apps falling below quality thresholds, it also raises safety concerns if the public are left to choose health apps in unregulated sources.

It also shows that there is a very real digital divide, highlighting a need for levelling up, in order to enable people to access the health benefits of digital health, and reduce pressures on NHS systems across the UK. This is especially important as the research reveals the positive effect digital health plays on reported health outcomes.

Encouragingly the research also reveals that such levelling up will not be met with resistance from the public. Despite remaining the most activated, London no longer stands out as having significantly more advocates than other regions. While **68%** of Londoners advocate for digital health, other regions now also show higher or similar readiness levels for digital health. For example, advocacy stands at **71%** in the North East, **68%** in Wales, **66%** in the West Midlands and **64%** in Yorkshire and the Humber. Even areas of low uptake show good advocacy levels, for example advocacy stands at **51%** and **66%** in East Anglia and the West Midlands respectively.

We know that NHS England has pledged to use lessons from the pandemic to level up digital maturity over the next year.[7] Future work, policy and guidelines supporting the levelling-up agenda must take into account these regional variations across the UK to ensure that inequalities in access and stark variations in activation are reduced.

NHS in digital health choices

Health and care professionals are the link between patients who need more support to engage with their health and the digital services that can provide additional support and further improve outcomes.
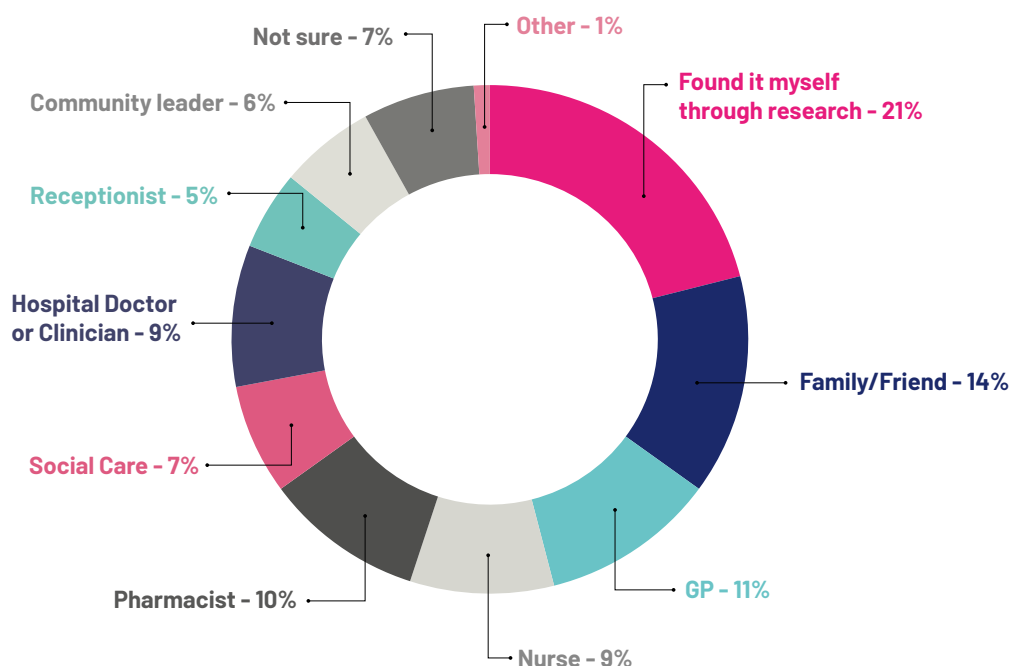
When examining NHS involvement in the recommendation of digital health to the public, in 2021 our research indicated that amongst those who had used a health app, half of people surveyed (**50%**) had their app recommended by a health or care staff member.

This year, we have seen an increase in this involvement, and we are now seeing **55%** of digital health usage due to a recommendation from a health or care professional. Looking closer at such recommendations, the most active roles are GPs and pharmacists, accounting for **11%** and **10%** of recommendations respectively.

The dataset shows a high level of app satisfaction when recommended by a GP regardless of age group.

If you have ever used a health app to help with your physical or mental health, please tell us who recommended the app to you?
(Percentage of sub-sample who have used a health app, n=939)

- Not sure – 7%
- Other – 1%
- Community leader – 6%
- Found it myself through research – 21%
- Receptionist – 5%
- Hospital Doctor or Clinician – 9%
- Family/Friend – 14%
- Social Care – 7%
- Pharmacist – 10%
- GP – 11%
- Nurse – 9%

As last year, there is a difference in recommendation by health and care professionals across patients depending on their age. Almost half (**49%**) of people surveyed aged 18 to 24 had their app recommended by a HCP, falling to **22%** in those aged 35 to 44, **17%** in those aged 45-54, and just **6%** in those aged 55 to 64, with a slight increase to **23%** in those aged 65 and over. This decline was relatively consistent across all role types.

However, only **3%** of those aged 55 and over received their app recommendations from a GP, compared to the highest rates of **8%** in the 25-34 and 45-54 groups, so there is still work to be done here.

The 18-24 age group has also seen an increase in the percentage of apps recommended by a health or care professional, rising from a third in 2021 to almost half (**48.6%**) in 2022. Other age groups have not seen large changes when compared to the previous year.

It should also be noted that **29%** of men were recommended their app by a health or care staff member, however only **19%** of women received their recommendations in this way. This reinforces the opportunity and need for digital health to be embedded into women's health services.

A significant number of decisions are still made outside of the healthcare setting, with personal research accounting for **21%** of decisions, followed by recommendation from family or friends at **14%**. These routes can also be supported by self-serve NHS resources, such as health app libraries of assured products.

The data emphasises the positive effect that health or care professional recommendation can have on an individual's digital health experience. Of the people who had their app recommended by a member of health or care staff, **82%** are digital health advocates and **79%** use their app frequently. However, when looking at the people whose app was not recommended by a staff member, only **55%** are digital health advocates, and **71%** use their app frequently.

NHS staff recommendation or self-serve support is a vital part of the digital health ecosystem, as in this unregulated market it is important to help the public make safe digital health choices. From a base of testing almost 9,000 digital health products available in app stores, ORCHA has found that only **20%** meet quality thresholds across 350+ clinical evidence, data security and usability measures.[8]

The people's view of digital in NHS mental health support

Listening to the UK public it appears we have reached a tipping point, where a significant proportion of the public want digital health to support their wellbeing. Amongst certain groups surveyed, more people want digital health tools than traditional medication.

The research found that, if experiencing a mental health challenge, more than a third (**36%**) of adults across the UK would be happy to receive a mental health app recommendation from their doctor. This is to help support conditions such as anxiety, stress, panic, depression, eating disorder or self-harm. This figure was even higher across many age groups, including; **45%** for 35 to 44 years olds, and **55%** amongst 18 to 24 year olds.

All age groups from 18 to 44 years old reported a higher advocacy for digital health than prescription medication, such as an antidepressant. And amongst those aged 18 to 24, this advocacy is even higher than one-to-one online counselling.

For further insights on the attitudes and behaviours in digital for mental health, please read our in-depth mental health report: The People's View of Digital Mental Health.[9]

Case study: Digital health supports social prescribers in Humber and North Yorkshire

Humber and North Yorkshire
Health and Care Partnership

Digital transformation is fundamental to improving the health of both citizens and the system itself. By harnessing the innovative use of digital solutions to deliver high-quality care and empower citizens to self-manage their health, ICSs can support their populations and health and care professionals, whilst improving efficiencies within the system. This is how Humber and North Yorkshire ICS (formerly Humber Coast and Vale ICS) is transforming to achieve this.

Situation

The population served by the ICS is approximately 1.4 million people, with **23%** of the population living in the most deprived areas of the UK, and a high proportion of this population living in extremely rural and isolated areas.

In 2019, the ICS was under a great deal of pressure. **8.9%** of the population were aged 75+, and of the under-75s, cancer was the leading cause of death – killing over 4,000 a year, with lung cancer as the biggest contributor. Smoking, alcohol abuse and obesity were higher than the national average, and **14%** of 16-24 year olds had mental health illnesses. **36%** of A&E visits were due to unavailability of General Practice services, and **40%** of patients visiting A&E required no treatment.

If no transformational changes took place, the ICS expected a budget deficit of at least £420 million by 2020/21.

During the process of developing its digital strategy, the ICS commissioned a public survey to ensure any digital transformation was aligned with their citizens' needs. Amongst the responses to questions on digital improvements to the patient experience were several requests for patient-related healthcare apps.

Solution

The ICS launched an ORCHA Digital Health Library in 2019 (hny.orcha.co.uk), with the intention of delivering quality-assured digital health to their population. The Library contained only apps compliant with safety standards, and provided an easy way to search for the highest rated apps across a wide range of issues.

Results

Social prescribers at the Citizens Advice Clinic found the inclusion of assessed digital health technologies within their work to be an incredibly valuable additional tool.

Elaine Elsdon at the Citizens Advice Clinic was introduced to the Library in May 2020, and began using it right away. She has found that the assurance of being able to signpost people to the health technologies available, in combination with the robust review process behind their inclusion in the Library, is very reassuring to the people she supports. The wide variety of health and care technologies (including apps) that are identified in the Library for each condition area means that she can identify support for the wide range of people supported by the Clinic. If a client presents an issue which she hasn't previously found a solution for, she can simply search to see which assessed solutions are available, and recommend them securely to her clients.

> **"Without ORCHA, I just would not have ever considered recommending any app at all. So for me, it's opened up a completely new world. And therefore, it's influenced me. It's made me a better practitioner because I have more tools available to me, and it's opened up a wider conversation with my clients about different kinds of support that are available out there."**
>
> **Elaine Elsdon, Link Worker at Citizens Advice Clinic**

To read the case study in full, visit our [website](#).

Conclusion

This research builds on findings from 2021 to show a clear appetite amongst UK citizens for digital health. With **62%** of people surveyed open to digital health but only **47%** having used it, there is still lots of opportunity to reach people who are already open to digital health with safe, health and care staff-recommended tools.

Specific areas with scope for progress include:

Women's health: While men are more likely to be recommended a health app by a health and care professional, and are more likely to have used a health app than women, we know that **59%** of women surveyed are advocates for digital health. This shows an area that needs to be addressed, as women that are advocates for digital health could be seeking out their own, potentially unsafe, solutions. The FemTech industry is expected to see exponential growth over the next few years.[10] This will create both opportunities to bolster women's services, and risks for women who don't have the support of a qualified professional and relevant framework to recommend a suitable product. Digital health will form a vital part of the Women's Health Strategy, ultimately helping to overcome the historical 'male by default' design of health and care systems, and close the gap in health outcomes.[11]

Regional variations: There are large discrepancies in digital health activation when comparing different regions in the UK, with London remaining the most engaged region for the second year in a row. Three initial steps that can be taken to start addressing this are:

- Find out what the situation is in your area - discover the exact attitudes, behaviour and NHS involvement for your region.
- Conduct an audit of recommendations within your organisation.
- Actively provide the core infrastructure in targeted regions to help level up the nation's access to safe digital health. Education, tools and frameworks in key regions will help health and care staff better support their patients with safe, assessed digital health tools.

Perhaps most importantly, the data shows a measurable difference to outcomes, with **83%** of people surveyed who have used a health app finding it helpful in improving their health and wellbeing. This is reinforced by a very high satisfaction level **(85%)** amongst those people who have used a health app. These findings are very encouraging and emphasise the potential that digital health has to support and transform wider services.

Get in touch

This report gives a high level summary of our research results. We can drill down into our data by region or demographic.

To discuss this research to help inform your plans and goals, and how ORCHA can provide staff education and a quality process to ensure that the best digital health is recommended to your patients, please contact:

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About ORCHA

The Organisation for the Review of Care and Health Apps (ORCHA) is the world's leading, independent digital health evaluation and distribution organisation. It helps health and care organisations to deliver the right digital health apps, to the right people, at the right time. Its unique insight, assessment, and implementation services are improving the health of the population, the health of our health systems and the health of the health app ecosystem.

ORCHA conducts reviews for government organisations across Europe, the Middle East, and Australasia.

In the UK, ORCHA conducts reviews for NHS Digital and NHS providers in 70% of regions. NHS England is accelerating adoption across the NHS, placing ORCHA in its National Innovation Accelerator Programme.

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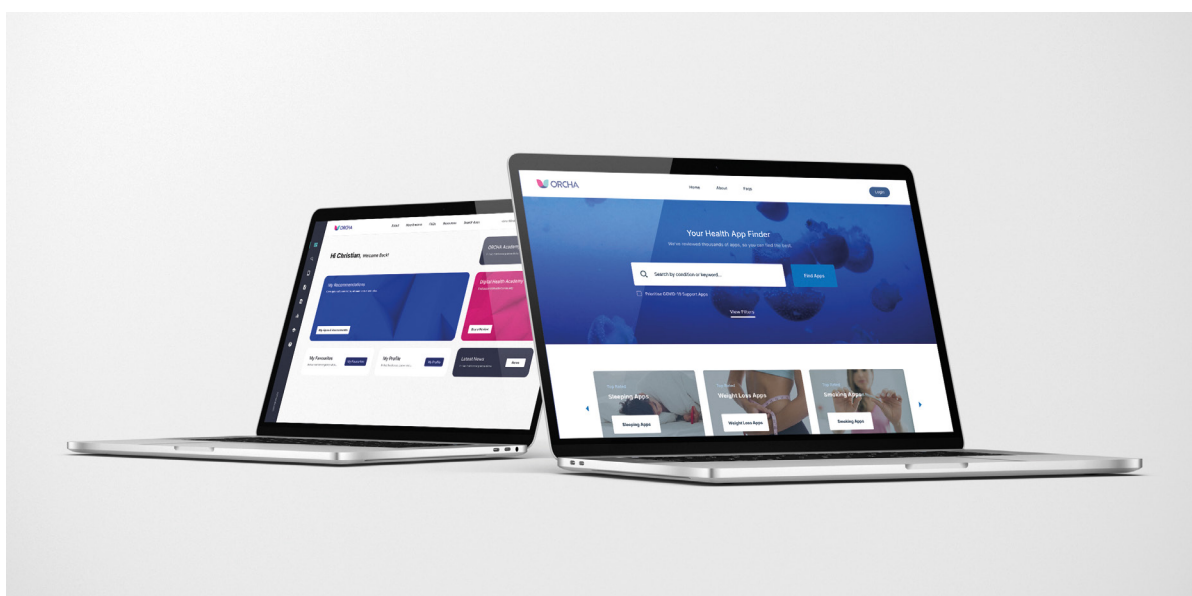
Example programmes

Examples of programmes conducted by ORCHA can be found below:

Humber and North Yorkshire ICS:

https://orchahealth.com/digital-health-supports-social-prescribers-in-humber-and-north-yorkshire/

Sefton Partnership:

https://orchahealth.com/new-website-provides-reliable-health-apps-to-sefton/

Our Dorset ICS and Lancashire and South Cumbria Health and Care Partnership ICS:

https://orchahealth.com/two-icss-set-to-pilot-a-new-digital-health-elective-care-toolkit/

South West Yorkshire Partnership NHS Foundation Trust:

https://orchahealth.com/yorkshire-smokefree-using-digital-health-products-to-support-service-delivery/

Best For You: Transforming mental health services for children and young people

https://orchahealth.com/orcha-partners-with-best-for-you/

Good Thinking, London's Digital Mental Health Service:

https://orchahealth.com/best-in-class-apps-for-londons-digital-mental-well-being-service/

Staffordshire Public Health:

https://orchahealth.com/staffordshire-public-health-changes-lives-with-digital-health/

Northern Ireland Government, COVID-19 response:

https://www.youtube.com/watch?v=5unQ9bWz2hk

HSCNI, dementia services:

https://www.youtube.com/watch?v=GOxRgtNOkIg

Papyrus, suicide prevention helpline:

https://www.youtube.com/watch?v=hVXcY6G7KmQ&t=102s

To see more case studies, please visit: https://orchahealth.com/our-impact/

About the survey

This online survey of 2000 UK adults (nationally representative) was commissioned by ORCHA and conducted by market research company OnePoll, in accordance with the Market Research Society's code of conduct. Data was collected between 22.04.2022 - 27.04.2022. All participants are double-opted in to take part in research and are paid an amount depending on the length and complexity of the survey. This survey was overseen and edited by the OnePoll research team, who are members of the MRS and have corporate membership to ESOMAR.

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