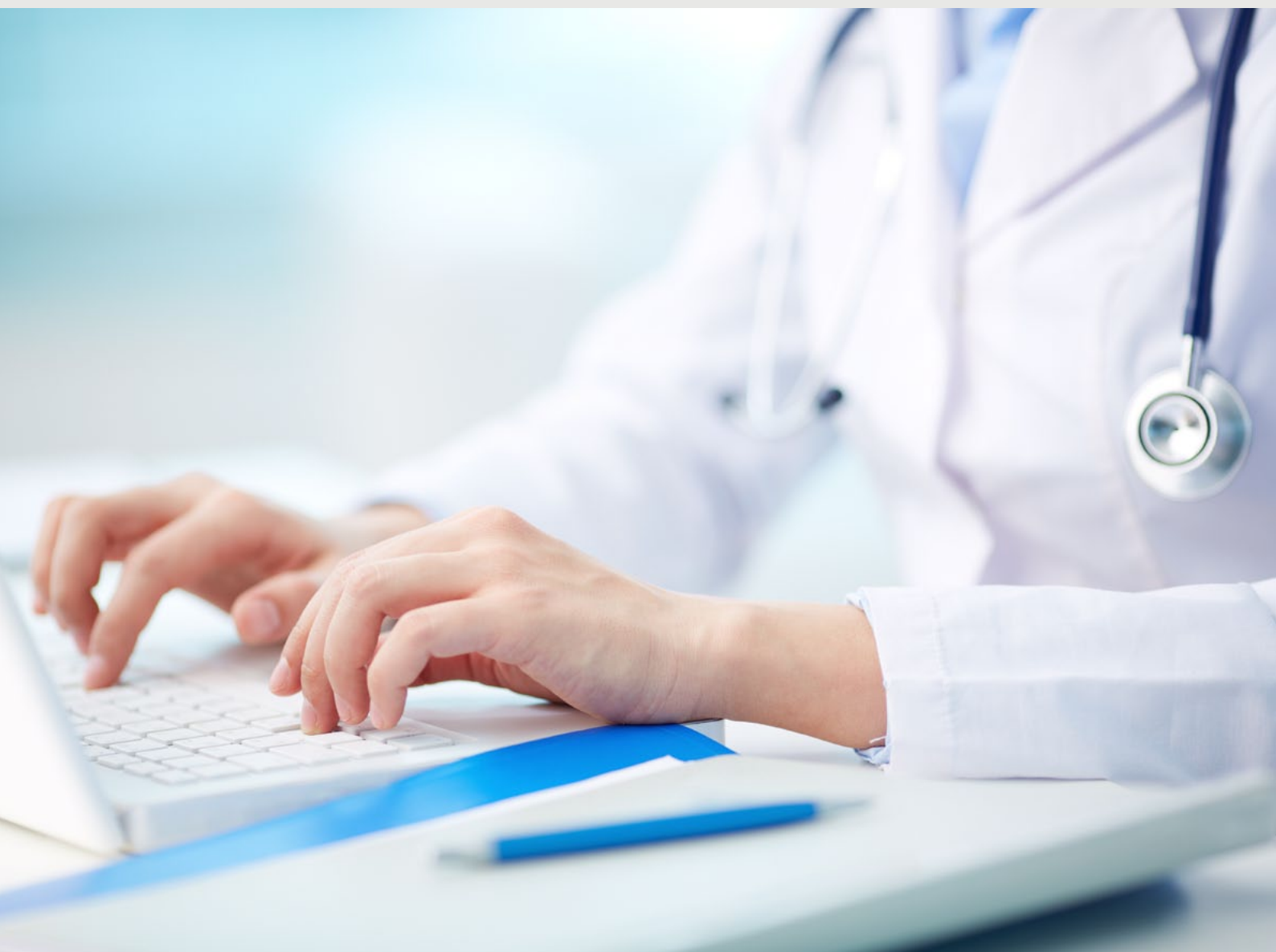


REPORT

Digital NHS Healthcheck: The Citizens' View

A Trustmarque study into how British citizens
view the progress of a digital NHS

July 2015



Commissioned by:

 **TRUSTMARQUE**

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Introduction

The NHS serves a population of over 64 million people throughout the UK and deals with over 1 million patients **every 36 hours**; if you couple this with increased scrutiny on expenditure, then its ambitions to become a digital organisation and meet the goals set by the government are going to be a big challenge.

There are 155 acute NHS Trusts in England and over 8,000 GP practices; in Scotland there are 14 regional NHS Boards, seven Special NHS Boards and one public health body; and in Wales, there are seven Health Boards and three NHS Trusts. As such, the complexity of the digitalisation challenge and the sheer amount of patient data involved cannot be underestimated.

Plans are in place that aim to revolutionise the use of technology throughout the NHS; the proposals seek to introduce new measures to improve health outcomes and improve the quality of patient care, through the use of digital technologies and innovations.

For example, the **NHS England 2020 Vision** includes a commitment to give all citizens online access to their personal GP records by 2015. Furthermore, by 2018, the NHS will seek to offer individuals online access to, and the ability to comment on, all of their health records (held by hospitals, community, mental health and social care services).

Trustmarque has commissioned research to find out what British citizens think about the progress of a digital NHS. The research also examined broader questions of how citizens see the NHS using technology innovation and how they would like to use technology to interact with medical professionals in the future.

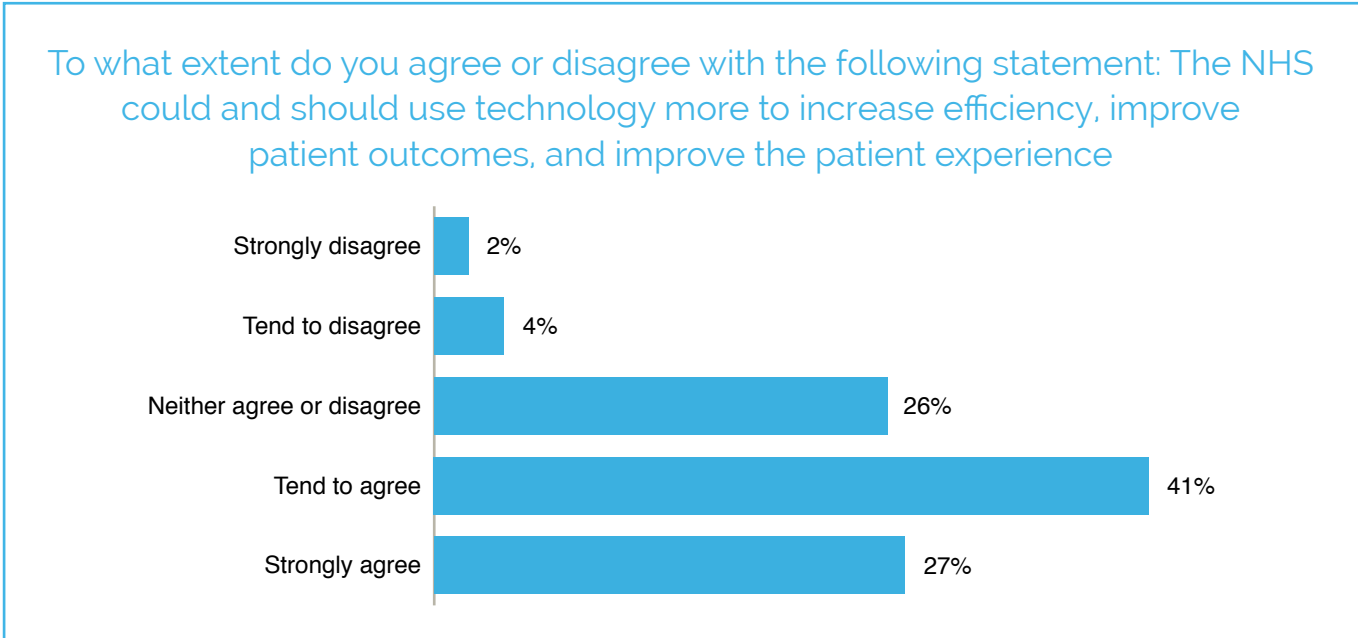
As citizens have become familiar with using technology in all other areas of their lives – from banking, to shopping, to education – the same expectation is being levelled at the NHS. Indeed, the research found that 68% of people think the NHS ‘could and should’ use technology more to increase efficiency, improve patient outcomes, and improve the patient experience.

The high expectations amongst the general public, coupled with the governmental imperative to digitise, underlines that the NHS is entering a critical phase in its development. In the coming years we are likely to see a revolution in how the NHS uses technology.

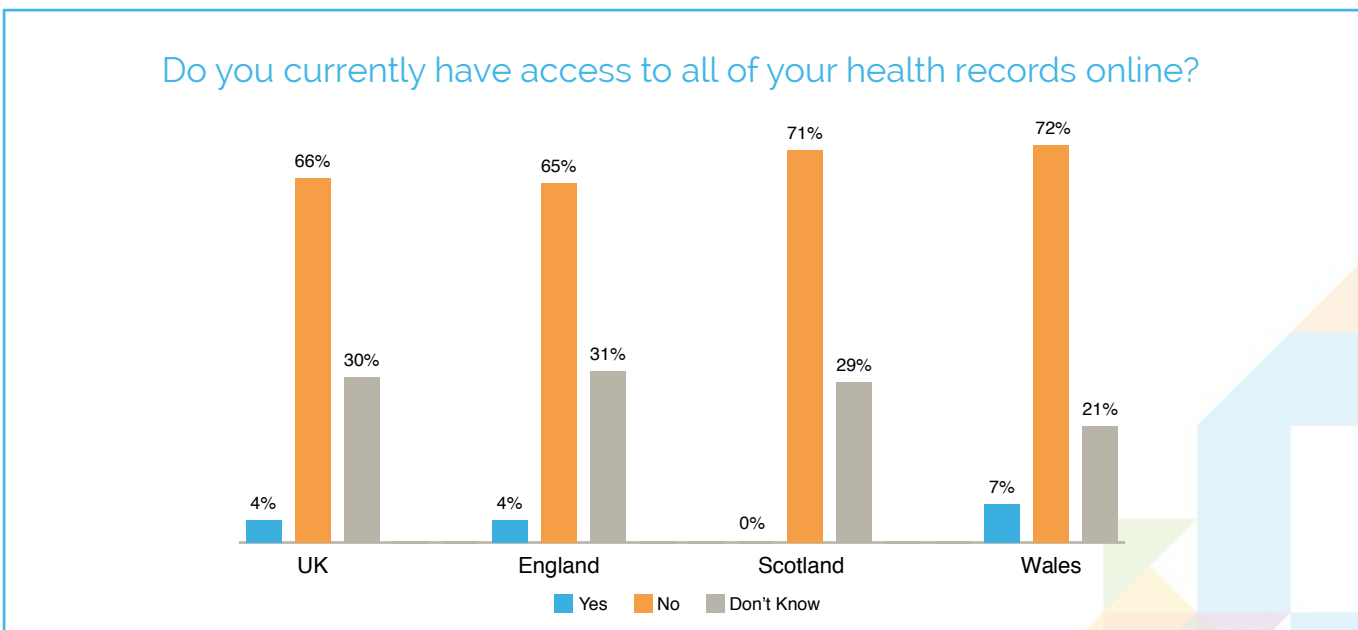
*All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2,010 adults. Fieldwork was undertaken between the 17th and 20th July 2015. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).

Barriers to information sharing in the NHS

More than two-thirds (68%) of British adults are of the opinion that the NHS should use technology more in order to increase efficiency, improve patient outcomes, and improve overall patient experience.



However, the research revealed there is still some way to go when it comes to the NHS using technology effectively to deliver new digital services. For example, when asked if they currently had access to all their health records online, the vast majority of respondents (96%) stated that they either haven't got access, or didn't know. The findings were broadly similar when broken down by individual country; however, in Scotland, no respondents said they had access to all their health records online.



The figures are also particularly revealing when looking at England specifically. Given the goal set in the NHS England 2020 Vision to have all GP records available online to citizens by the end of 2015 and the ability for them to access and comment on their health records by 2018, it is clear this reality is some way off.

The findings also highlight that the inability of health professionals to access or share information effectively is impacting patient care and operational efficiency. Indeed, repetition of the same information to multiple NHS staff was another problem area: 39% of British adults stated that they or someone they knew had to repeat the same medical information to health professionals on more than one occasion.

A large white percentage '39%' is displayed on an orange background.

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As a direct result of the lack of efficient data-sharing methods, over a quarter (28%) of respondents said they, or someone they knew, had experienced a delay in receiving care due to health professionals' inability to share patient information.

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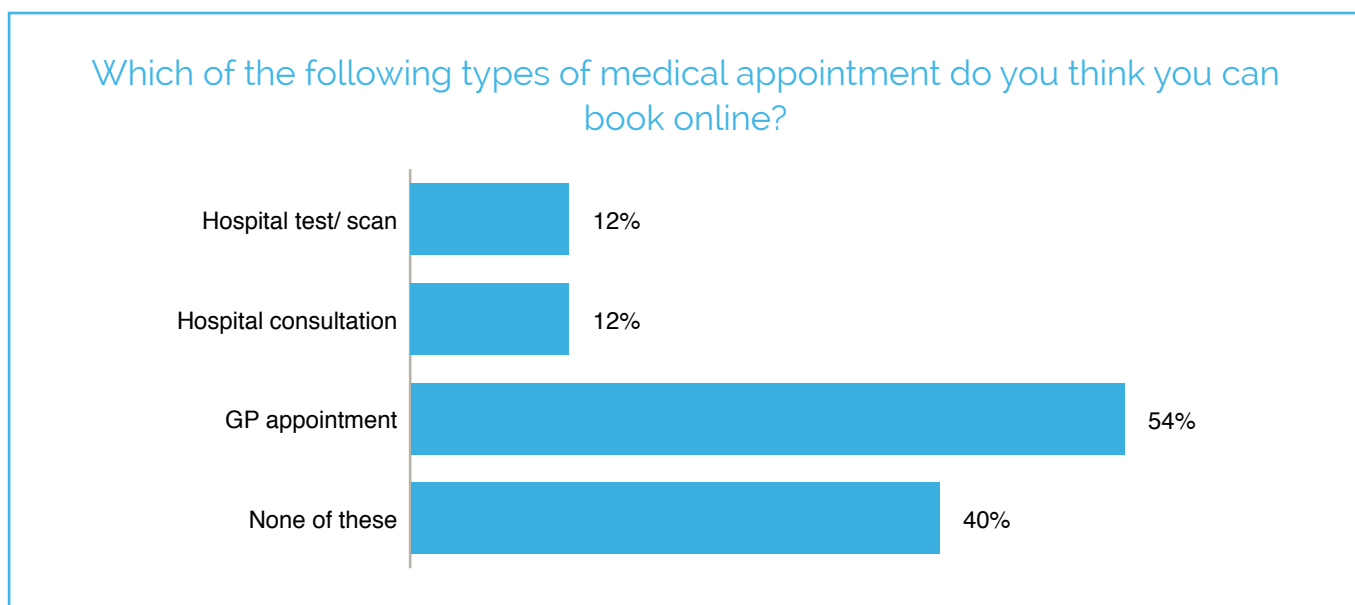
Given the size and complexity of the NHS, it is not surprising that there are challenges with making information available online, and with sharing and using data more efficiently amongst clinicians. The NHS is made up of a huge number of moving parts, and coordinating all of those areas is a multifaceted challenge. The NHS needs that challenge to be simplified, and to increase its understanding of how technology can help that simplification, while supporting the NHS to achieve its goals.

By having patient data available online, medical professionals can access important clinical information without needing to ask patients several times or put in a request to another team or Trust, reducing possible delays in healthcare as a result. This not only provides the advantage of minimising financial waste, but also frees the time of clinicians so they can spend more on care – leading to improved patient outcomes and a better patient experience.

Difficulties with booking and managing appointments create inefficiencies

Booking and managing medical appointments is one of the biggest burdens for the NHS – clinically, financially and administratively. In 2013 and 2014, there were over **82 million outpatient attendances**; as of the end of April 2015, over 3 million patients were on a waiting list for treatment, all of whom will need to book or be allocated an appointment.

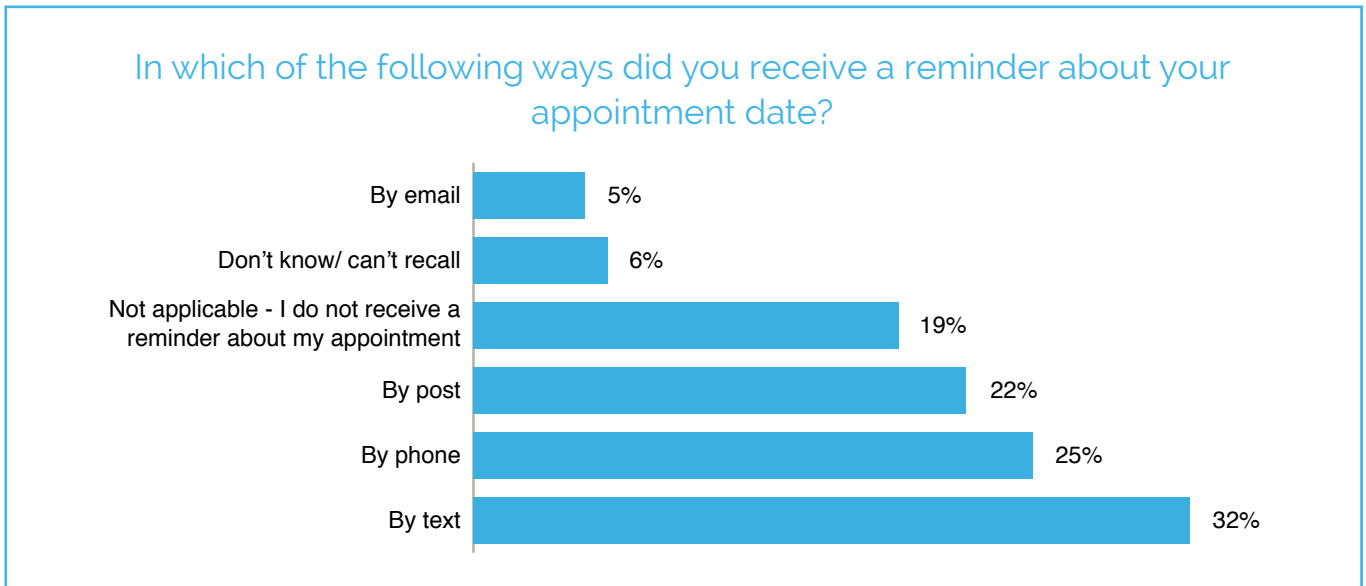
The NHS recently launched the e-Referral service for patients to be able to book hospital appointments (following a GP referral) online, or through its telephonic equivalent: 'The Appointments Line'. While the e-Referral service was troubled with technical issues following its launch, currently over **90% of healthcare providers** allow patients to book through the NHS e-Referral Service or The Appointments Line. However, when asked, 40% of respondents in the survey did not think that it was possible to book a GP, hospital consultation or hospital test appointment online.



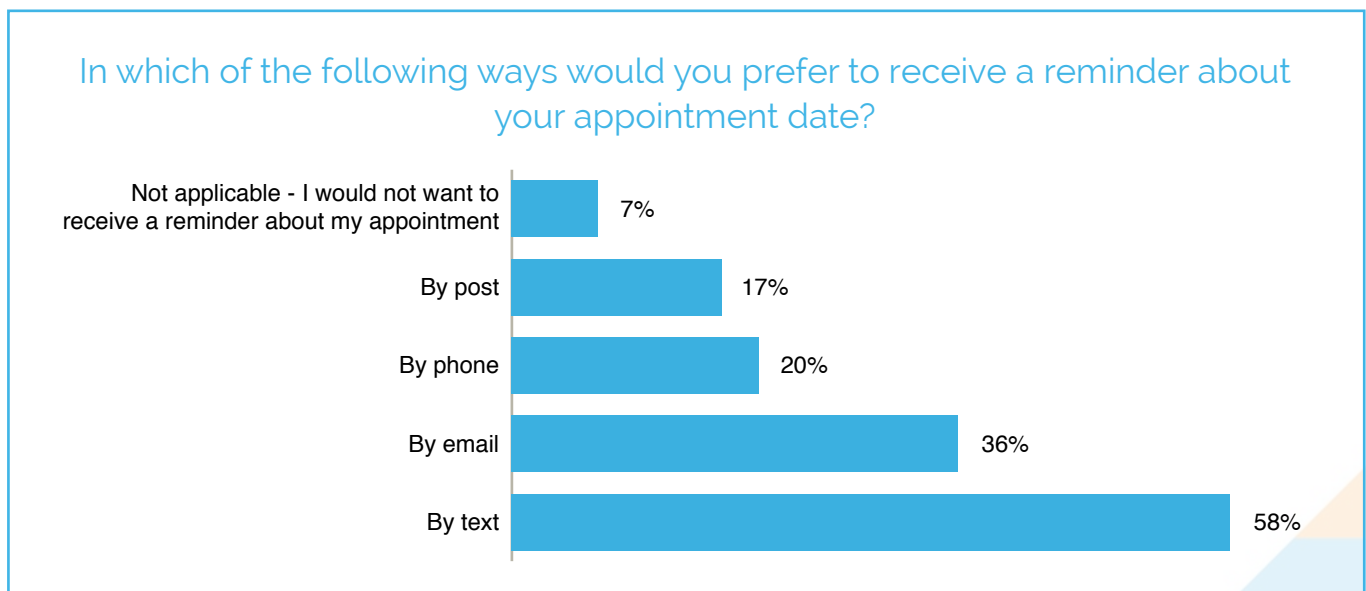
This demonstrates that there is a clear opportunity for the NHS to encourage more patients to use the e-Referral Service simply by raising awareness of it amongst the general public. For example, only 12% of respondents were aware that both hospital consultations and hospital scans/tests could be booked online through e-Referral. In addition, while **97% of GP practices** offer their own online booking services, only 54% of respondents thought that booking a GP appointment online was possible.

Allowing patients to choose and book their own appointment at the most convenient time for them will reduce the number of missed appointments – which is a considerable problem across NHS services. Indeed, the NHS reports that over 12 million GP appointments are **missed each year**, costing in excess of £162 million. In addition, at an average cost of £108.00 per appointment, 6.9 million outpatient appointments are also missed each year.

Appointment reminders can also be used to ensure patients do not forget to attend. Currently, when reminders are used, 32% of patients receive them by text message, 25% by phone, and 22% by post; only 5% of patients were contacted by email.



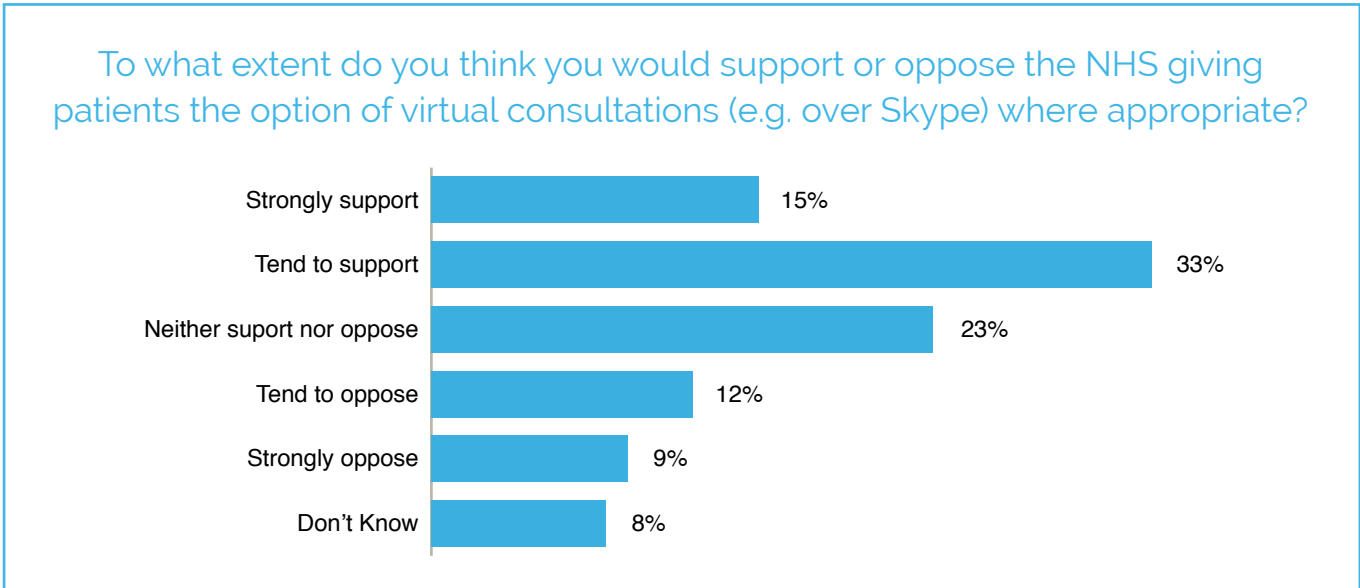
When it comes to appointment reminders, the research reveals that British adults are keen to see more digital communication in the future. When asked how they would prefer to receive reminders in the future, 58% of respondents said by text message, followed by 36% by email, 20% by phone and 17% by post.



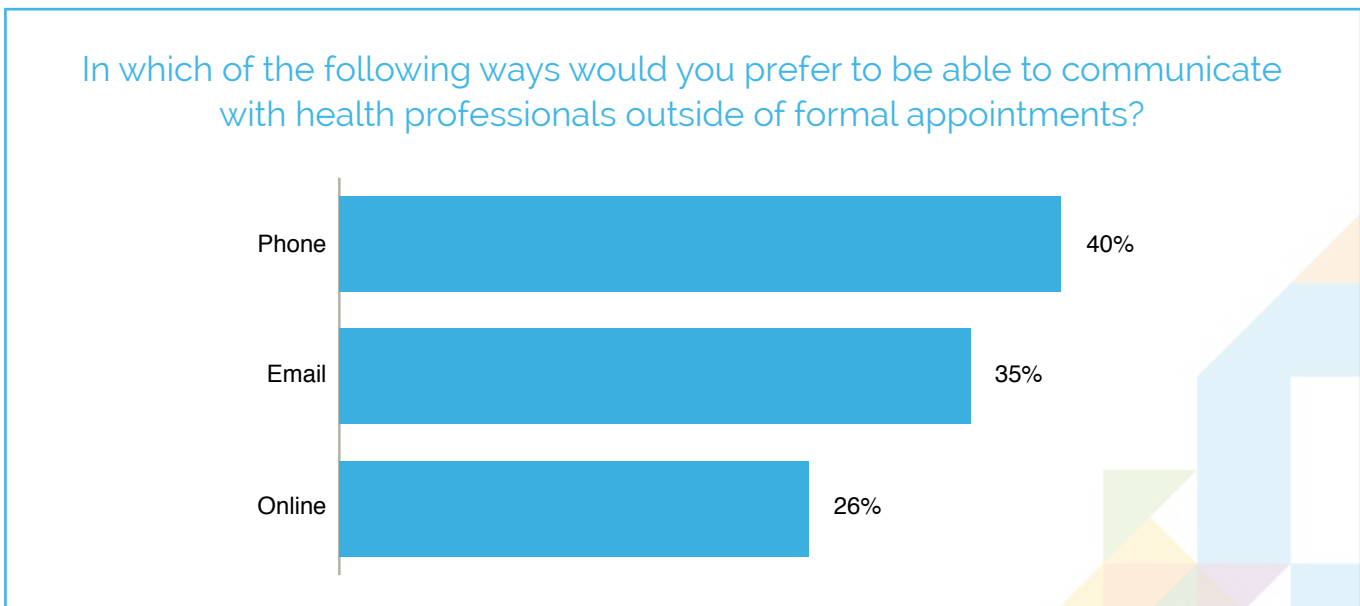
These results indicate that British adults are in favour of using digital communication channels that will help improve appointment attendee rates. Furthermore, looking at the propensity of survey respondents toward email and text reminders in particular, it's clear that citizens do not want costly and resource intensive reminders in the form of post or telephone. If the NHS can deliver reminders electronically, it will also reduce the financial cost associated with appointment reminders – as well of the cost of the missed appointments themselves.

Interacting with medical professionals using technology

As new technologies and innovations become available to the NHS, new channels for communication between patients and clinicians are made possible. This opens up avenues for communications outside of a physical appointment environment that can be used to generate greater efficiencies for the NHS, through formats such as 'virtual consultations' over video links, where appropriate. Nearly one in two (48%) respondents, when asked, said they would support the NHS giving patients this option.



In addition to introducing virtual consultations, the majority (72%) of survey respondents stated they would like to be able to communicate with health professionals outside of formal appointments; with phone (40%) and email (35%) being the most popular alternative communication channels.



Currently however, many patients are unable to communicate in the ways they would like to, and are not offered a great degree of flexibility in conversing with medical professionals; 30% of respondents were unable to communicate online, 33% by email, and 25% by phone.

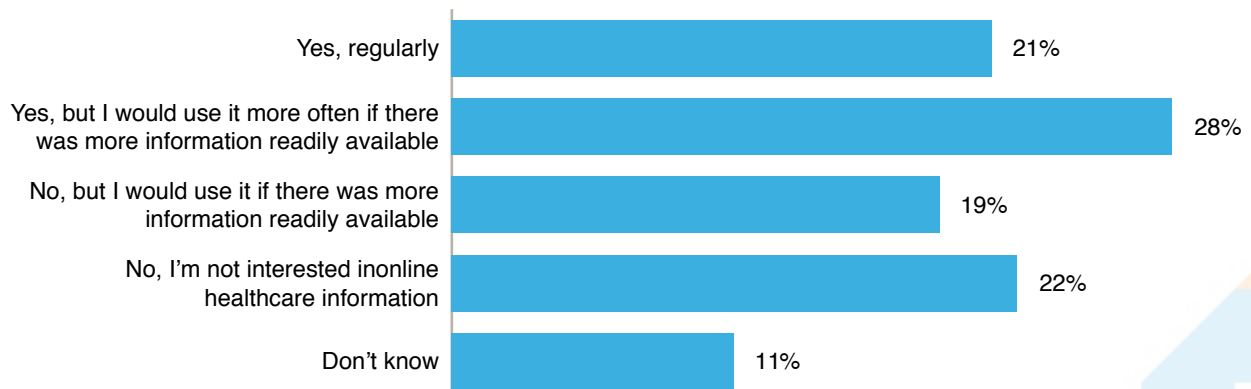
In which of the following ways do you typically find it not possible to communicate with health professionals outside of formal appointments?



In addressing this current inflexibility by introducing new technologies to support different communication channels, the NHS could realise significant efficiencies and costs savings. It will also reduce the number of appointments which are made simply to ask a clinician a quick question, or those that do not require a physical examination. Additionally, by allowing communication via the preferred methods of communication, users will be more satisfied with the service and the patient experience will be improved.

The survey also revealed that nearly half (49%) of British adults have used healthcare information available on the internet to identify and diagnose symptoms, or to suggest courses of action.

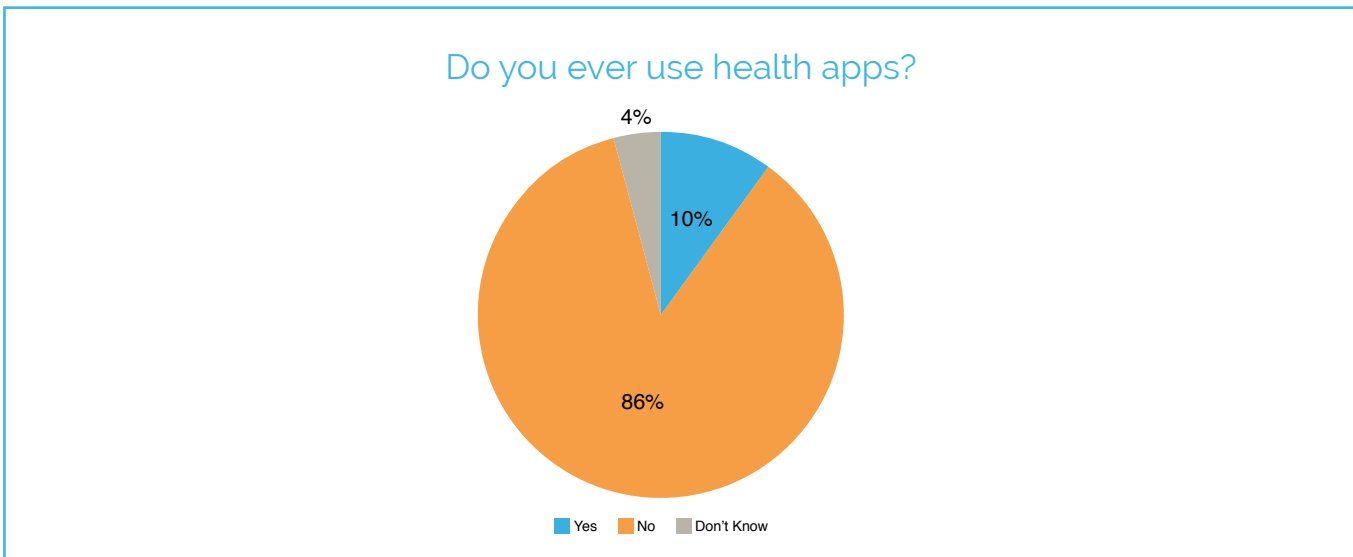
Do you ever use online healthcare information?



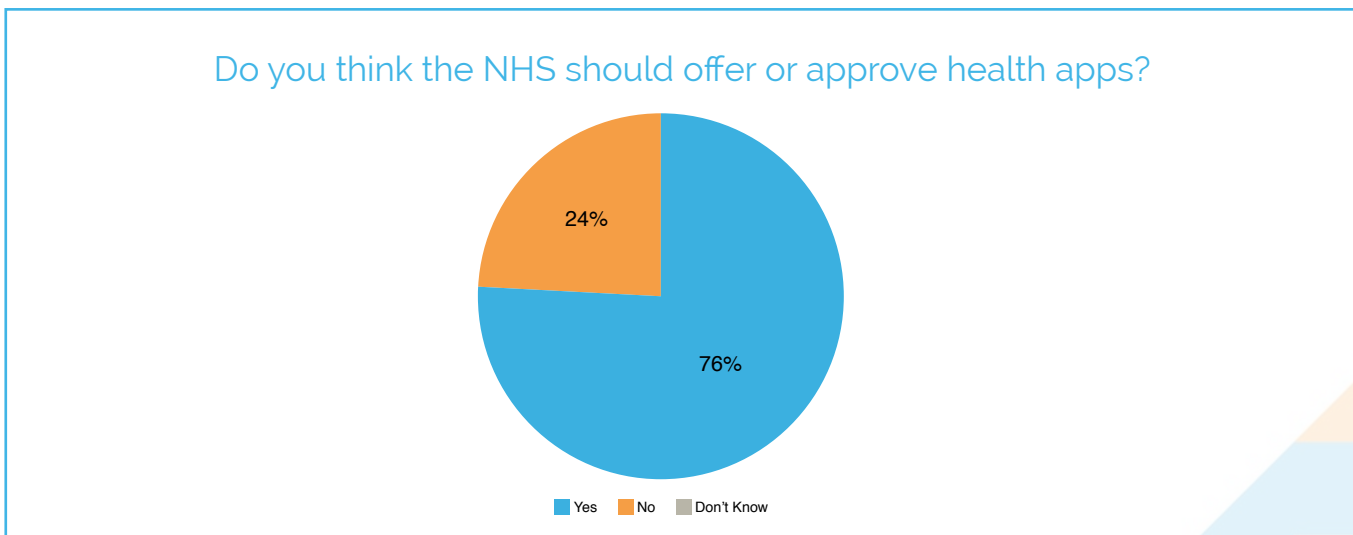
With 28% of respondents stating that they would use online services more often if more information was readily available, there is an opportunity for the NHS to create considerable efficiencies by providing such services, in addition to offering greater convenience to patients.

Patients are keen to use more applications and wearable technologies

As innovations in technology make wearables technologies and mobile health applications more commonplace, the survey found that current adoption of such technologies is in the early stages, but the appetite from the general public to use such tools is high.

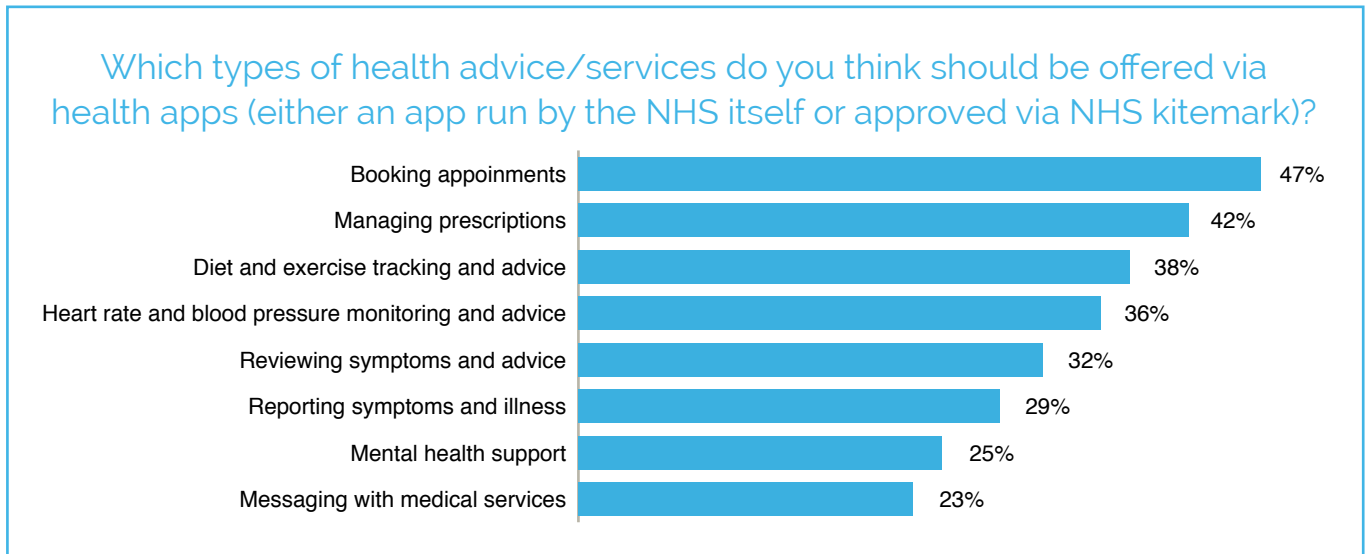


Currently, only 10% of respondents use health apps to help them monitor and manage their health; but over three-quarters (76%) of respondents thought the NHS should offer or approve health apps.

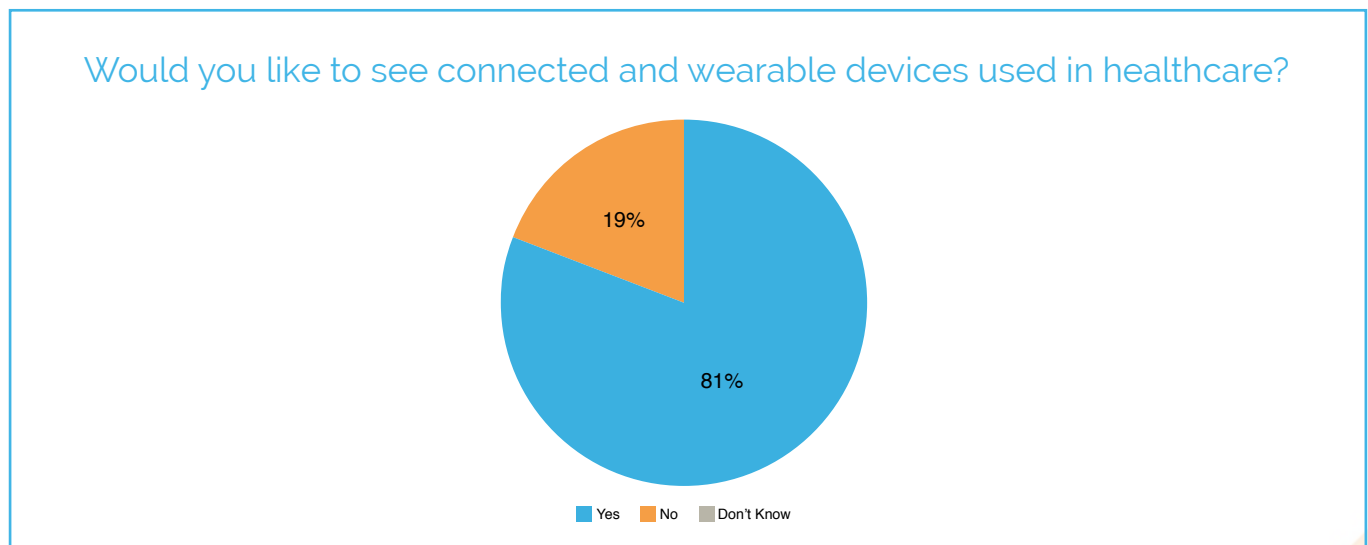


Future NHS plans include the introduction of an NHS 'kitemark' that will validate health-related apps for mobile phones and other personal devices. One of the main reasons behind introducing more mobile health applications is to support the drive for the NHS to go 'paperless', which the NHS has previously stated it would like to achieve by 2018.

When it came to what type of services respondents would like to see offered via an app run by the NHS, or approved by NHS kitemark, booking appointments (47%), managing prescriptions (42%) and diet/exercise tracking and advice (38%), were cited as the most popular services.

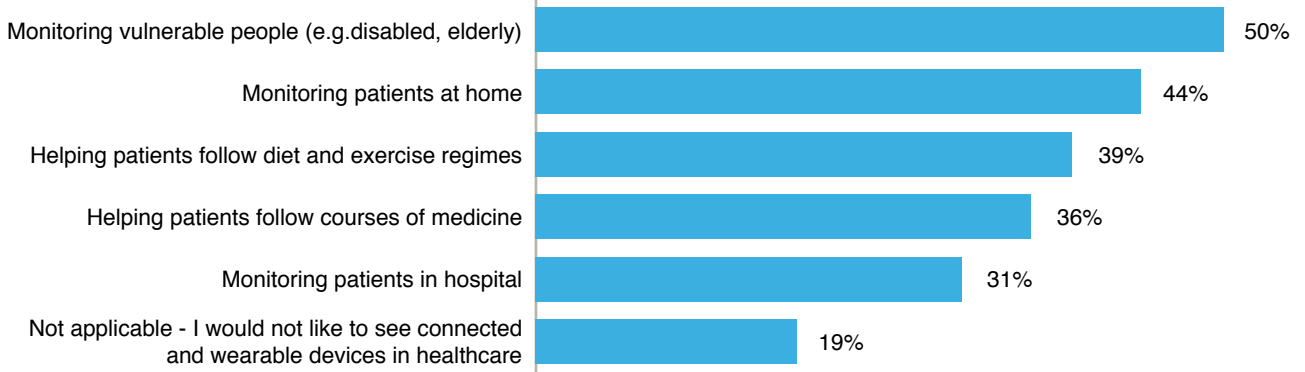


There has also been a lot of talk regarding how the Internet of Things (IoT) could benefit the healthcare sector. Indeed a further 81% of respondents said they would like to see more connected and wearable devices used in healthcare.



The ability to monitor vulnerable people (50%), monitor patients at home (44%) and helping patients' follow diet and exercise regimes, were seen as the most popular potential applications of connected and wearable devices.

In which of the following places would you like to see connected and wearable devices used in healthcare?



These figures indicate that as citizens become more familiar and comfortable with health applications and wearable technologies, there is an opportunity for the NHS to transform existing services and offer new ones that will lead to a healthier society and more efficient healthcare system.



Summary: The Future of the Digital NHS

Ultimately, what Trustmarque's Citizens' View report reveals is that British adults are keen to have greater access to digital healthcare services and adopt more technology innovations in healthcare; whether through accessing their health records online, or using wearable applications to monitor their own health and wellbeing. In the long run, this drive will usher in greater efficiencies and improve health outcomes; in the shorter term, it will place considerable pressure on NHS IT teams.

There is no doubt that technology can play a significant role in helping the NHS achieve the aims of the 2020 Vision, and help both back-office staff and front-line clinicians meet their objectives. Yet implementing and managing the technology that will underpin the transformation of the NHS is no simple task. Whether digitising and making health records available, considering a move to cloud, rolling-out a new patient administration system, or upgrading core infrastructure, it is imperative that every penny spent in the NHS represents the best value possible. At a time when the NHS is under more scrutiny than ever, it must work with technology partners that can help deliver this value, while driving the organisational transformation that will underpin an improved patient experience.

Trustmarque works with the NHS throughout the United Kingdom to help Trusts implement technology solutions that deliver value, while also improving patient care and operational efficiency. With Trustmarque, NHS Trusts have the confidence of working with a services provider that has over 27 years' of healthcare experience. This expertise places Trustmarque in an excellent position to help the NHS take advantage of technology innovations that drive organisational transformation.

Whether enabling the NHS to modernise, realise cost savings, or drive improved engagement with citizens, we remove complexity from IT to achieve successful business outcomes. Simplifying IT, our integrated services empower customers at every step of the IT investment process, from solution development through technology provision to deployment and on-going support.

