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PEOPLE POWERED HEALTH

Engaging Citizens in the Future of Health and Technological Innovation

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From the Authors

CHARTING THE RISE OF PEOPLE POWERED HEALTH

Opinium Research and Lansons Health have joined together to ask the general public what their expectations from healthcare are today, and to understand the opportunities that technological innovation can provide to the sector – in terms of meeting rapidly evolving patient expectations and healthcare needs.

In this report, entitled **People Powered Health**, we lay out the findings of a multi-phase research study that reveals an enormous opportunity for technology to complement healthcare services in ways that can improve prevention, reduce pressure on healthcare services and improve overall patient outcomes. Most important of all, it reveals an overwhelming public support for greater and more radical innovation across the healthcare sector that mirrors our developing consumer expectations in other aspects of our lives – be it banking, clothing, shopping or travel.

Why did we feel that now was the right time to conduct this study? We wanted to understand the role that ordinary citizens can play in shaping the future of a healthcare system that is facing significant challenges from an aging population, a growing number of challenging health issues (such as diabetes and dementia) and the need to balance the books across the public sector. The Department of Health has set clear priorities for the coming Parliament: increasing the focus on public health to move to a preventative healthcare model, providing greater access to services across communities, delivering more integrated and holistic care, and shifting the healthcare system towards a human-centred and human-powered model.

To achieve all this in five, ten or even twenty-five years will require forward planning and engagement with stakeholders now. It requires stakeholders from across the healthcare, technology and business sectors to join in a discussion about the opportunities that exist for radical innovation and the steps needed to make these priorities a reality. The NHS is already making great strides in this arena with the recent launch of the NHS Innovation Accelerator programme in July, which is funding seventeen pioneering projects that mark the start of an innovation revolution in public healthcare. But this is just the start of the revolution and there is still a huge gap in understanding the potential benefits of technology and the particular patient groups who can benefit the most.

There is latent potential within the digitally empowered public, which will only increase in future years. In less than a decade, the smartphone has made its way into half of the world population's hands – it is the fastest selling piece of technology in world history.[1] By 2020, smartphones will account for 80% of all mobile data traffic and the Internet of Things will have taken a big step closer to reality, with an estimated 26 billion connected devices across the world.[2] Understanding how to unlock the potential of this vast digital population in healthcare, whether through digital services, online public health campaigns, social media or even Big Data, should be one of the principal debates of the day.

Our sincere hope is that the findings in this report help to kick-start this debate and shed light on potential areas of immediate and long-term promise. It tells a story of an aspirational public, searching for tools and information that will empower them to better manage their health and wellbeing, safe in the knowledge that when they need complex intervention, the best people and technologies are there to support them.

Realising the vision of people powered health is a task that requires cooperation and involvement from all stakeholders. This is only a small beginning on a much longer journey. And as that journey unfolds, we very much look forward to working with you.

JAMES SWEATMAN

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Digital Britain

TECHNOLOGY IS DRIVING CONSUMER EMPOWERMENT

Over 96% of UK adults now own at least one connected device, whether it is a webcam-enabled computer, a smartphone, tablet or one of the latest wearables. What that equates to is more than nine in ten digital citizens across the UK, each of whom are already interacting with digital services and using technology in ways that benefit their lives.

And as the data in Figure 1.1 demonstrates, in addition to being expansive, the device ecosystem in the UK is also rich and diverse. While traditional desktops and laptops still hold pole position in many households, our data shows that the transition towards mobile devices has been unprecedentedly rapid and pervasive. 70% of UK adults own a smartphone and more than half of us own a tablet device. Given that the iPad only turned five years old in April 2015, this represents a remarkable adoption rate of technological innovation.

More importantly, with around half of those aged over 60 owning a smartphone or tablet computer, it is clear that the mobile revolution has not been the sole stomping ground of the youngest generations. In fact, our data suggests that up to 6% of early adopters are aged over 60 – in clear defiance of the classic stereotype that older generations are unwilling to engage with technological innovation. Therefore, while older generations have perhaps been disadvantaged by the fact that they have not grown up with these new technologies, our findings show that there is a vibrant and active community of digital citizens among the elderly population.

FIGURE 1.1 CURRENT OWNERSHIP OF DIGITAL DEVICES BY REGION

NATIONAL

Laptop or desktop computer equipped with a webcam

71%

Smartphone or Tablet

63%

Smart Device (e.g. Nest or smart lighting)

13%

Wearables and Smart Watches

14%

Smart Home Device (e.g. home sensors)

12%

KEY

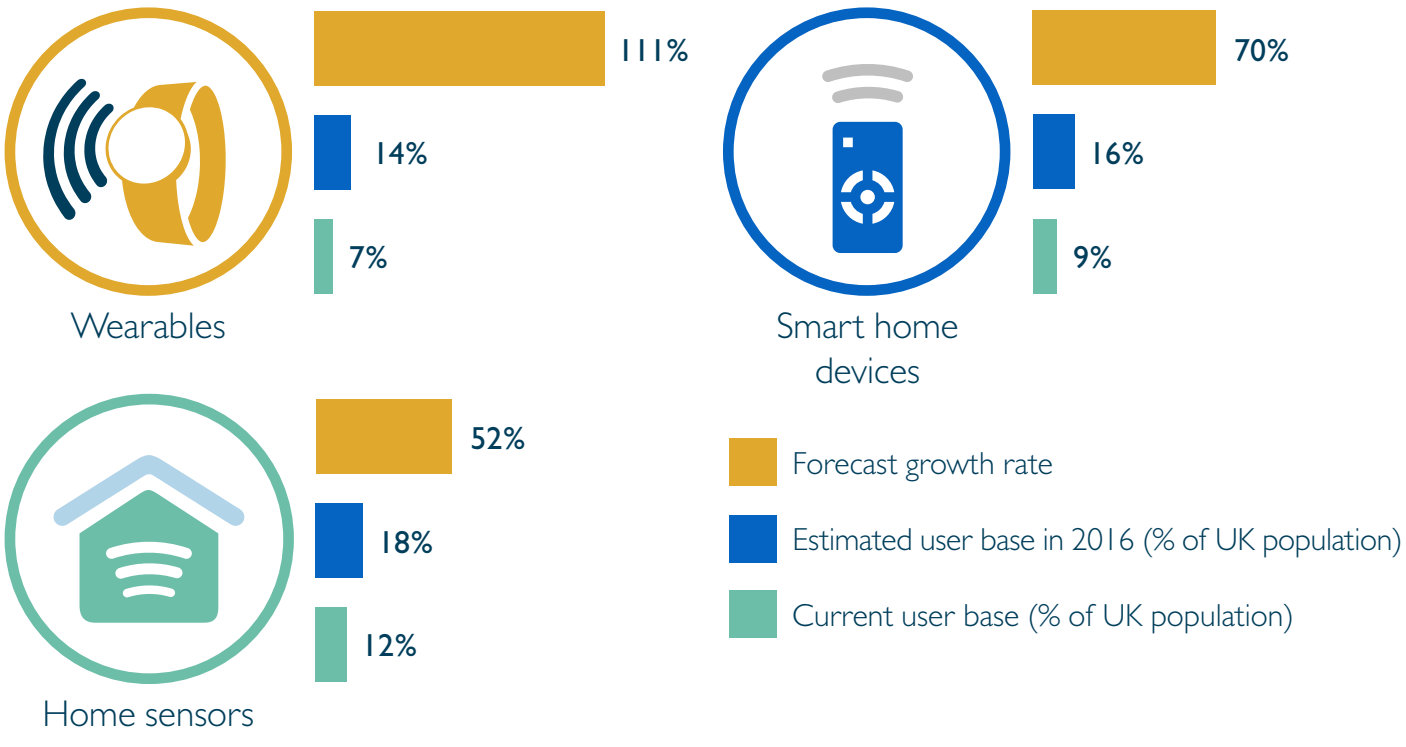
- LAPTOP OR DESKTOP COMPUTER EQUIPPED WITH A WEBCAM
- SMARTPHONE OR TABLET
- SMART DEVICE (E.G. NEST OR SMART LIGHTING)
- WEARABLES AND SMART WATCHES
- SMART HOME DEVICE (E.G. HOME SENSORS)

GROWING SMARTER EVERY YEAR

Even after 26 years of the Internet, this astonishing pace of innovation and growth shows no signs of abating. In every corner of the world, public and private sector organisations are looking towards the Internet of Things in an attempt to understand the opportunities it will provide for connecting with the public and for delivering more efficient and effective products and services.

Our research demonstrates that, while penetration of wearables and smart home technology is still relatively small in the UK, the market is set to grow exponentially over the next year (see Figure 1.2). In fact, these two areas will witness the fastest growth rate of any technology, with the user base of wearable devices set to double – meaning that by this time next year, more than one in ten UK adults will be wearing a smartwatch or fitness band.

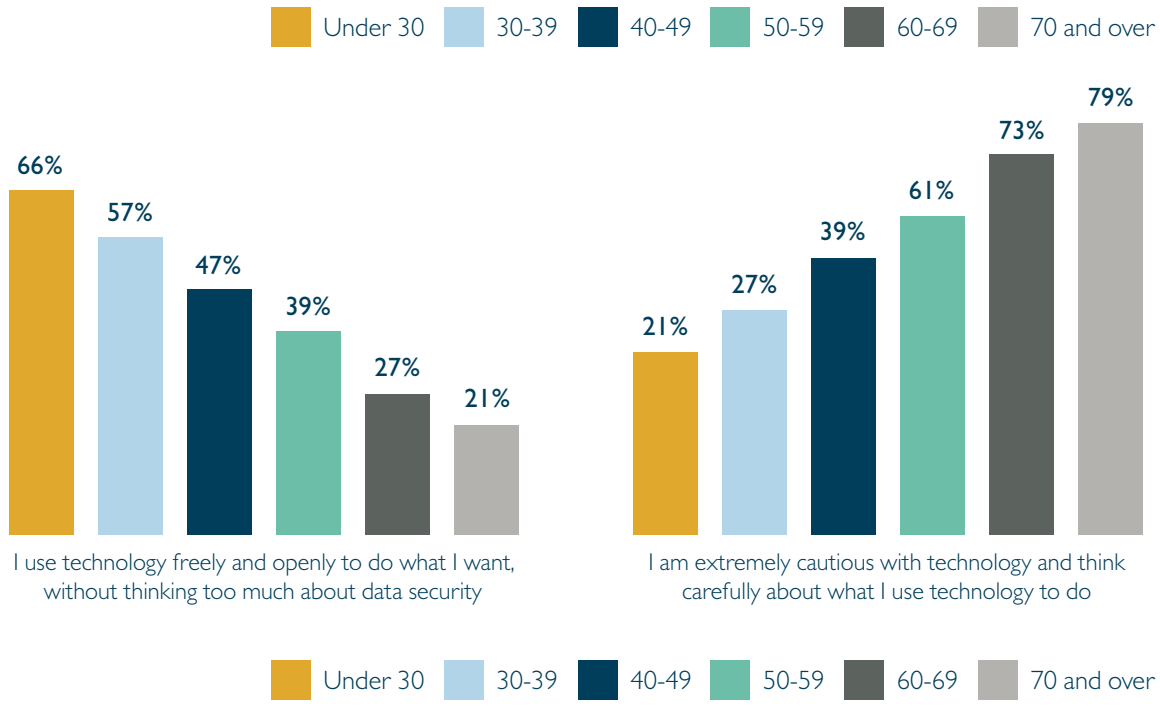
FIGURE 1.2 **PREDICTED GROWTH OF SMART DEVICES IN 2016**



This substantial shift towards wearable technologies that track and provide information for us on the move, as well as smart devices that monitor and provide remote control of our homes, is indicative of a much broader shift in consumer behaviour. When searching for information or purchasing a product, for example, consumers are five times more likely to use digital channels (such as websites and apps) than traditional channels (such as the telephone or physical stores). Most importantly, this preference for using digital channels is true across all age groups – with the only marked difference being that younger generations prefer to go mobile rather than use traditional websites.

It seems as though our expanding preference for digital channels is starting to alter the way we think about technology at a fundamental level. When we asked UK adults what the barriers to their adopting new technologies were, only 3% said that it was because they do not trust new technology. And while it is true that over half of UK adults (56%) say that they are extremely cautious with technology and think carefully about what they use it for, when we look at the data by age group we can clearly see that attitudes towards technology are starting to change quite rapidly.

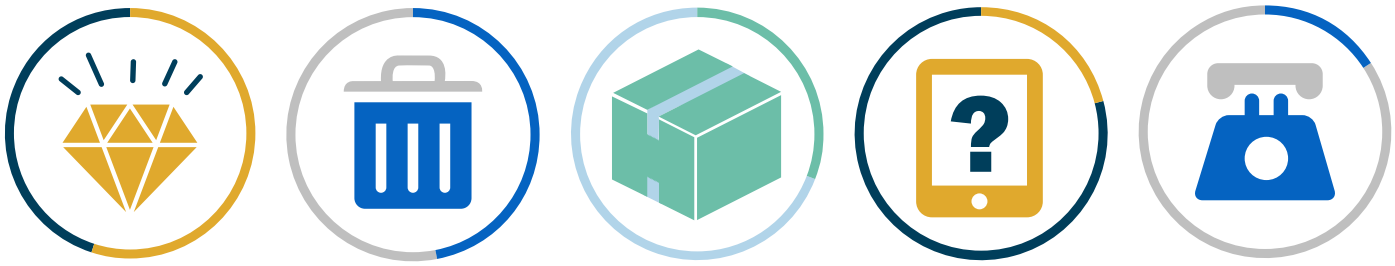
FIGURE 1.3 **SHIFTING ATTITUDES TOWARDS TECHNOLOGY BY GENERATION**



Rather than a fear of data theft and privacy invasion, therefore, the biggest barriers to adopting new technology are price and a lack of perceived benefit for the individual. Nearly half of UK adults (see Figure 1.4) told us that they do not buy new technology because they 'don't really need it', with a further 33% saying that they 'won't use it enough' and 23% saying that they 'do not see the benefit'. And so, while consumers are shifting ever further onto digital platforms and opting to employ technology in their daily lives, the single biggest barrier for new technology remains one of communication. Specifically, being able to communicate a clear proposition to consumers that explains how innovations will improve the speed, effectiveness and convenience of everyday tasks in a way that benefits them.

For the innovators who are able to demonstrate compelling use cases for new technologies, there is a growing market of digitally empowered consumers ready to listen to their pitch.

FIGURE 1.4 **BARRIERS TO ADOPTING NEW TECHNOLOGY**



55%
Too expensive

45%
Don't really need it

31%
Won't use it often enough

21%
Don't see the benefit

16%
Don't keep up-to-date with technology

Disrupted Health

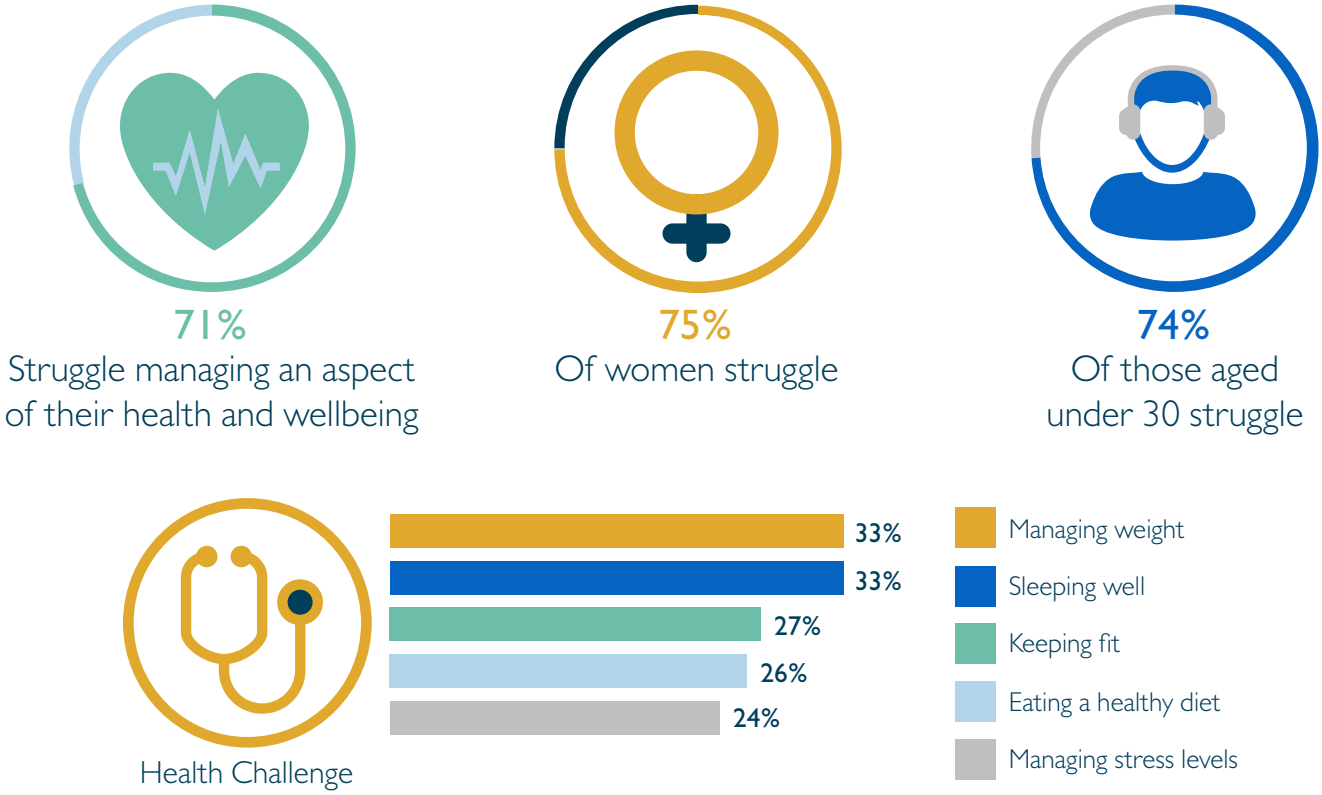
TECHNOLOGY IS DRIVING CITIZEN ENGAGEMENT IN PERSONAL HEALTH MANAGEMENT

Mapping the digital landscape in Britain is the first step towards understanding the opportunities that technological innovation present to the healthcare sector. But given that the technology sector has an uncanny ability to disrupt entire industries seemingly overnight due to the openness and scalability of its platforms, we also wanted to understand how existing technologies are being used to manage health and wellbeing today.

What we found is that technology is already being used by a sizeable proportion of young UK adults, who either struggle with an aspect of their health and wellbeing or simply want to take more proactive steps to maintaining their health. In total, over 70% of UK adults struggle to manage an aspect of their health and wellbeing (see Figure 2.1) with the most common areas of difficulty being weight, adequate rest and keeping fit through exercise. According to our data, women are statistically more likely to struggle with an aspect of their health and wellbeing, while those under 40 are more likely to struggle with keeping fit than those aged over 40.

While our data only shows how UK adults feel about their health (rather than whether or not they are statistically more likely to actually be unhealthy), these findings are important in demonstrating how different segments of the population feel about their state of wellbeing, and therefore in understanding the actions that they take to improve their health.

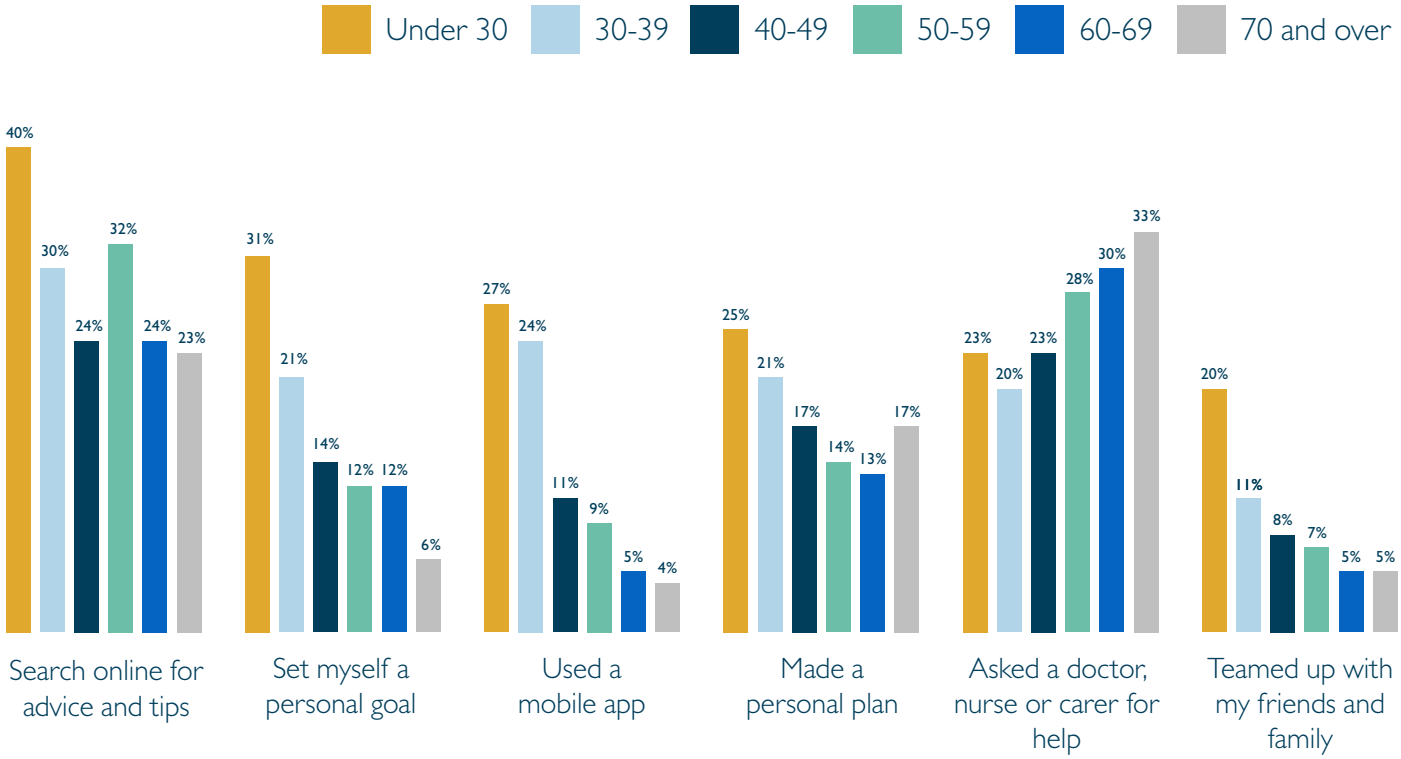
FIGURE 2.1 **HEALTH CHALLENGES FACING UK ADULTS**



The most common tactic that UK adults employ to manage their health and wellbeing is to search online for advice and tips, with 29% of those who struggle with their health doing this. But given that we live in a world where Google and Twitter have their own verbs in the Oxford English Dictionary, this might not come as much of a surprise. Indeed, the second most common tactic used by 26% of UK adults is still to ask their doctor, nurse or carer for health advice.

However, if we look at our data by age group we see a different picture start to emerge. As Figure 2.2 shows, each successive generation of UK adults has become less likely to turn to their doctor for advice and has instead opted to take greater personal control over their wellbeing – either through setting personal goals, teaming up with their friends and family or searching online for advice and tips. Those aged under 30 are twice as likely to turn to Google as those aged over 60.

FIGURE 2.2 **TACTICS USED TO MANAGE HEALTH AND WELLBEING**

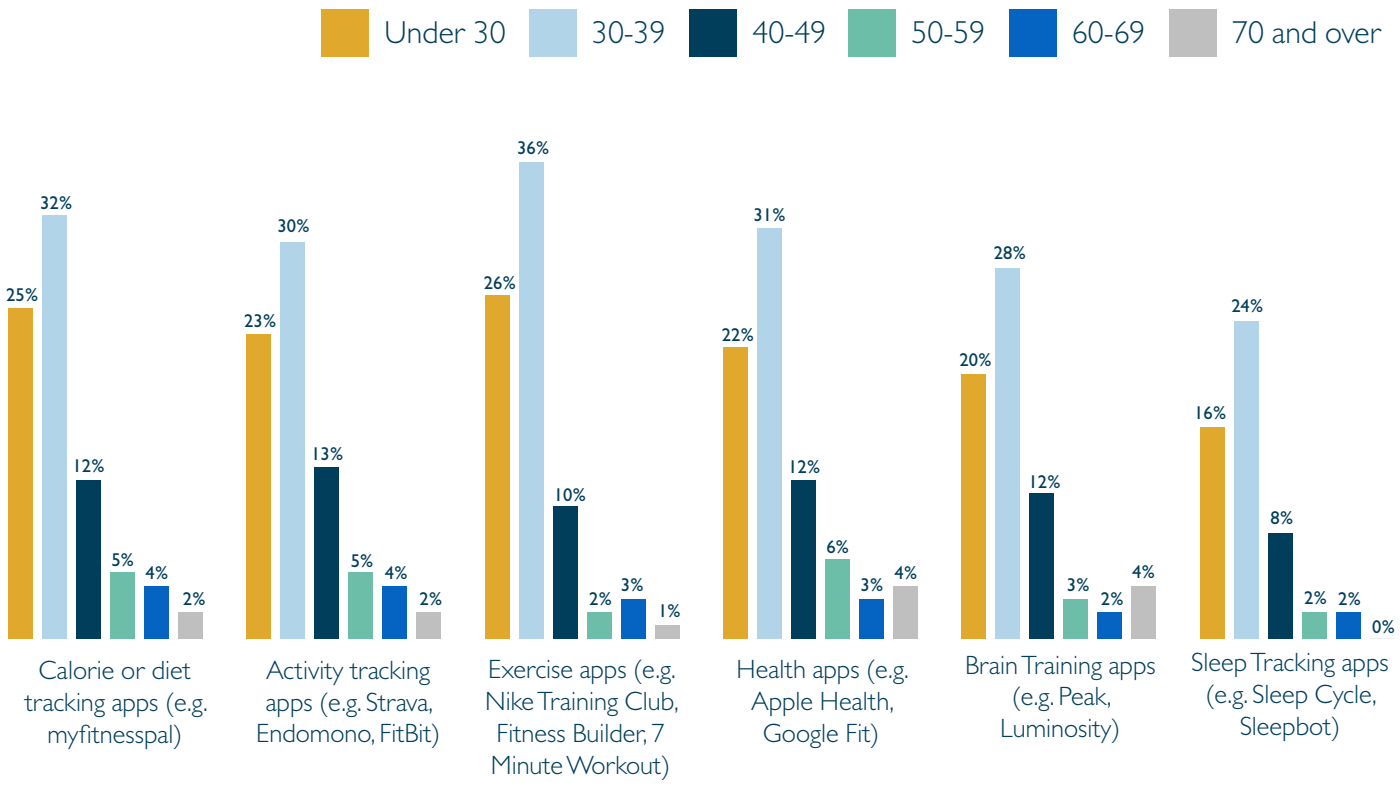


But most astonishing of all, those aged under 40 are more likely to have used a mobile app to help manage their health and wellbeing than turned to a doctor or nurse for advice. Overall, the data in Figure 2.2 demonstrates that there is an increasing desire for greater personal empowerment and responsibility around health in each successive generation of patients, and that within that pursuit for empowerment mobile technology is starting to play a critical role.

GROWING SMARTER EVERY YEAR

In Figure 2.3, we can see that while the use of mobile apps is still limited to a minority of the population, a significant proportion of those aged under 40 are using them to help manage their health and wellbeing on a regular basis. Taking into account that the areas where those aged under 40 struggle the most with their health are keeping fit and managing their weight, the data in Figure 2.3 also suggest that users of mobile apps are deliberately targeting those that will help them overcome specific challenges in their daily lives – as opposed to randomly experimenting with new technologies. What this demonstrates is that mobile technology is already being appropriated by younger generations in their quest for greater empowerment over their health.

FIGURE 2.3 **THOSE WHO CURRENTLY USE MOBILE APPS**



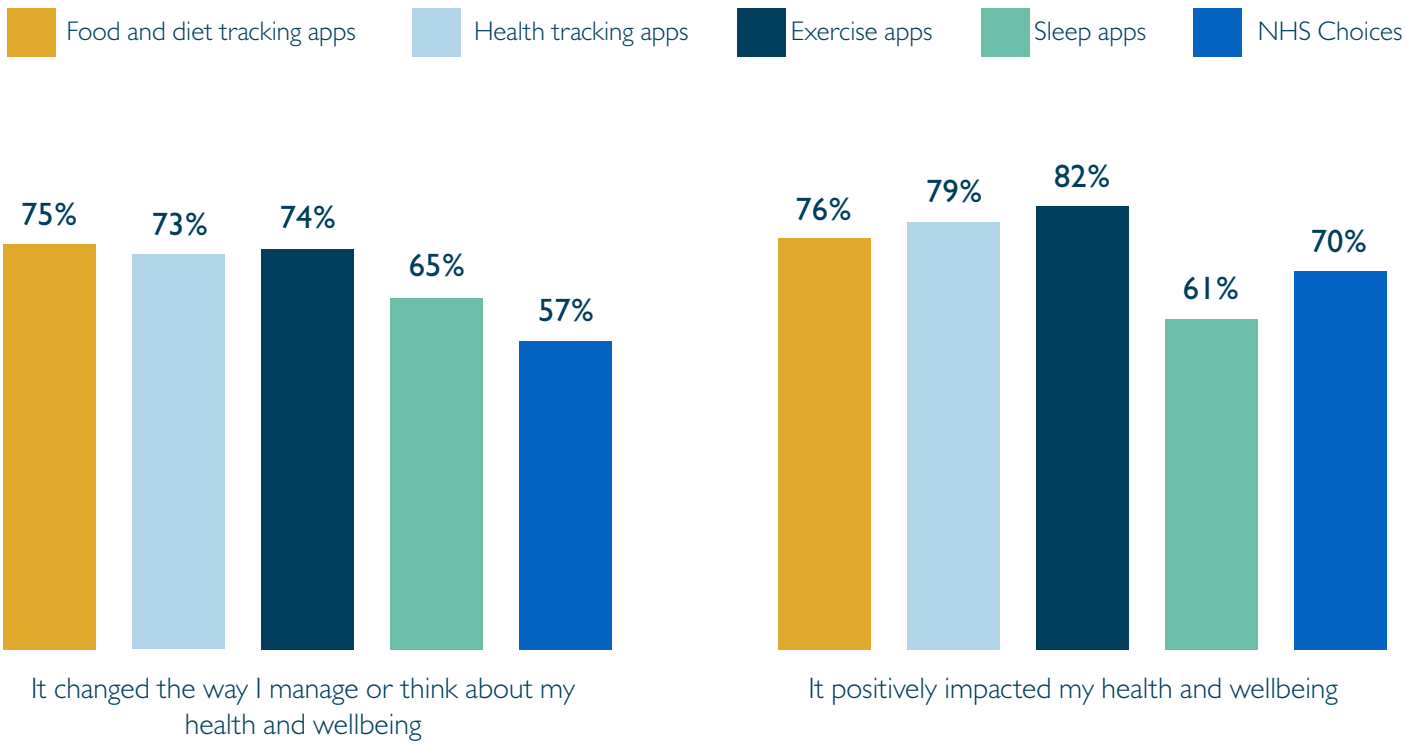
If we look at the top five benefits of health-related apps (as stated by regular users) then it quickly becomes obvious why technology is being used so readily in this way.

FIGURE 2.4 **TOP FIVE BENEFITS OF HEALTH-RELATED APPS**

Over half (53%) of regular users state that one of the main benefits of these apps is being able to monitor their progress over time. The increased degree of control and intervention in their health that such long-term data collection provides is also generating a number of additional important benefits. Nearly half (45%) say that these apps encourage them to lead a healthy lifestyle and more than a third say that they enable them to set goals, feel more dedicated to achieving them and allow them to take proactive steps to compensate if they start to see their progress towards those goals slip. Contrary to what we might expect, particularly for activity tracking and exercise apps (such as FitBit and Strava), this ability to monitor personal progress over time is more important to regular users than the competitive aspects of these apps – only a fifth say that seeing how they compare to others is an important benefit.

But our data also revealed another key benefit of health-related apps. One that is perhaps most important when thinking about how technology can complement primary healthcare services is their ability to raise the base level of fitness and health across the population. As the data in Figure 2.5 shows, with the exception of sleep tracking apps, over 70% of users state that health-related apps have changed the way they manage or think about their health and wellbeing – with over three quarters stating that it has positively impacted their health and wellbeing.

FIGURE 2.5 MOBILE APPS ARE DRIVING CHANGES IN BEHAVIOUR



It would appear, therefore, that one of the key benefits of these apps is their ability to encourage behavioural change around how individuals manage and think about their health over a sustained period of time. This suggests that mobile technology has an enormous role to play in health over the coming years, as our health system makes greater strides towards delivering preventative healthcare.

The scale of the opportunity that mobile presents already seems substantial. In addition to helping to promote sustained behavioural change around healthy living, mobile technology also provides useful environmental and contextual data around patients' lifestyles outside the hospital that can potentially be used in is and treatment planning. Indeed, one in ten users admits to already sharing their app data with their healthcare professional – a figure that rises to almost a quarter when we look at those who have visited hospital six times or more over the past year.

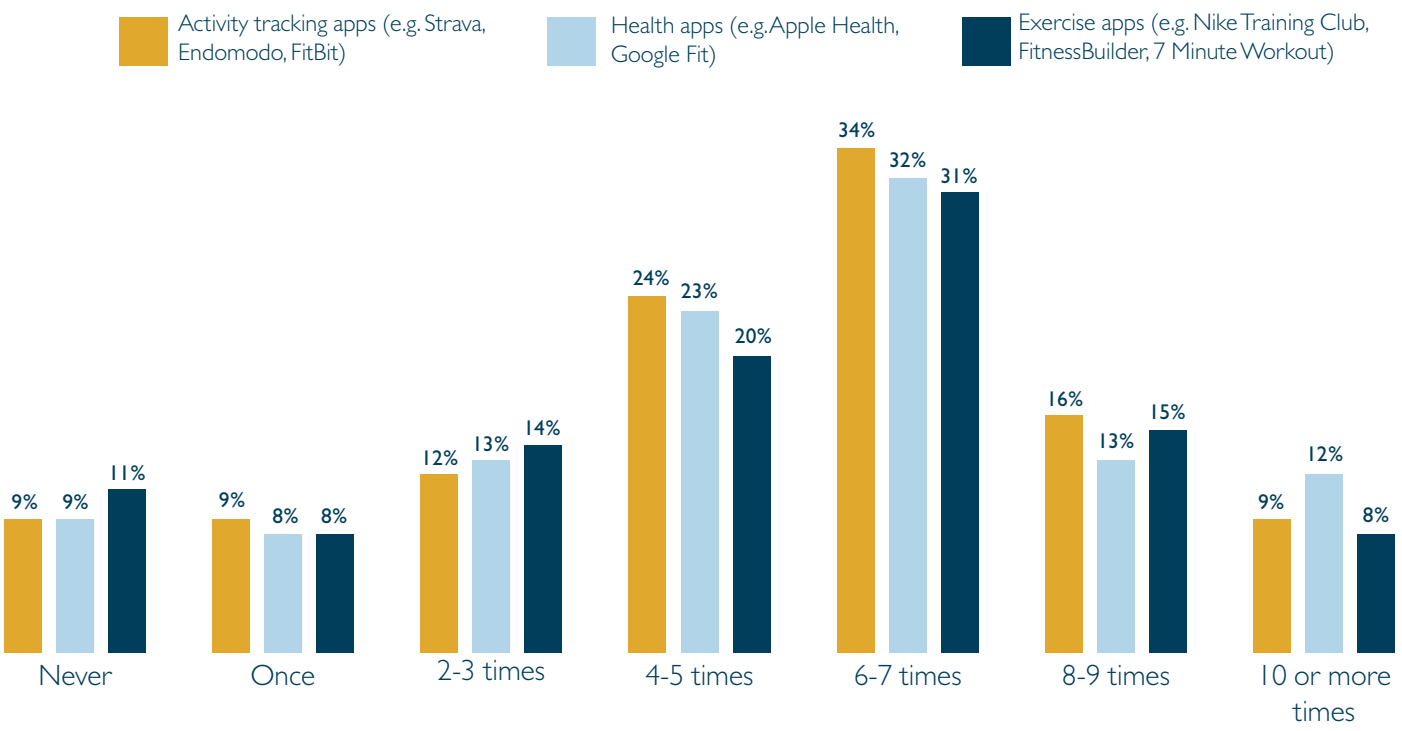
FIGURE 2.6 EXISTING DATA SHARING BEHAVIOURS

MORE THAN 1 IN 10 HAVE SHARED THEIR DATA WITH A HEALTHCARE PROFESSIONAL

24% OF THOSE WHO VISITED A HOSPITAL SIX TIMES OR MORE IN THE PAST YEAR HAVE SHARED THEIR DATA WITH A HEALTHCARE PROFESSIONAL

Take into account the fact that usage of health-related apps is highest amongst those who frequently use healthcare services (see Figure 2.7) and this potential to leverage environmental data from mobile apps starts to look extremely promising in terms of healthcare applications. Not only does it suggest that patients with medium or long-term health problems are already seeking ways to better manage their health and wellbeing on an on-going basis, but it also suggests that better integration of mobile technology with primary healthcare providers could lead to faster diagnosis, better monitoring in the community and faster intervention when things go wrong.

FIGURE 2.7 HEALTH-RELATED APP USAGE BY FREQUENCY OF NHS USE IN PAST YEAR



COMMUNICATING THE HEALTH BENEFITS TO CONSUMERS

As we witnessed for those who have not yet adopted newer technologies such as wearables, the main barrier to adoption with health-related apps is a lack of awareness around the benefits they confer. Only 5% of non-users say that they are concerned about the data that these apps collect, whereas 61% say that they are simply not interested in using them. Again, it is up to software designers and innovators to understand the need and demonstrate the benefits that these apps provide. So far, many of the use cases that have been presented so far have mostly revolved around the idea of gamification of data – the novelty of being able to see your data and compare it with others. But, as we have seen, the real benefits of these apps are not the ability to compete with others, but rather the level of personal control and empowerment that the data provides to individuals. The ability to see one's progress over time, to set individual goals (no matter how big or small) and take proactive action are what users value most. And, as the number of data collection tools (in the form of wearables and smart devices) increases over the coming years, so too will the value and health benefits of these apps.

Connected Health

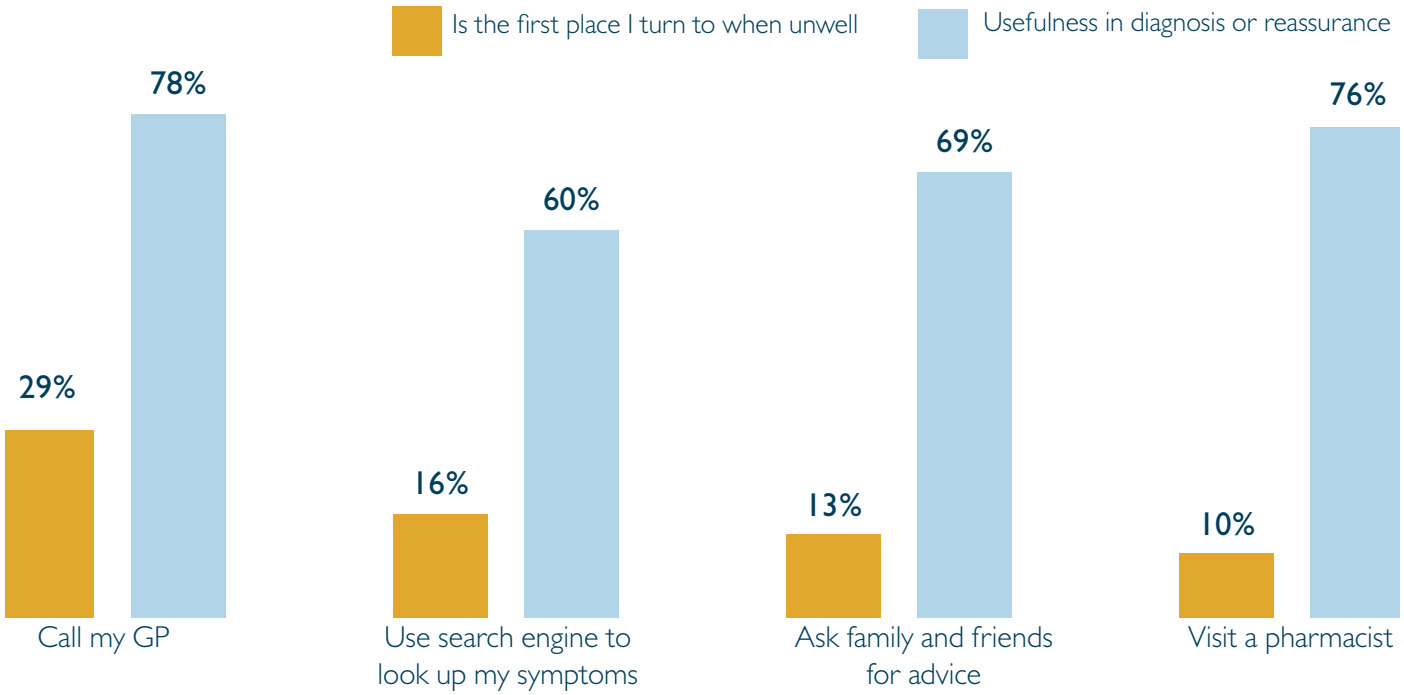
TECHNOLOGY IS CHANGING HUMAN BEHAVIOUR

To understand how healthcare providers can maximise the opportunities for innovation in technology, both now and in the future, we also need to understand how our engagement with healthcare services is starting to change. For over two millennia, healthcare professionals have played a central role in maintaining public health – and that shows absolutely no sign of abating. But even in the past 50 years, the methods that practitioners and nursing staff use to fulfil this role have changed immeasurably and will most likely continue to evolve as society moves more towards a digital and mobile mode of living.

TURNING TO DIGITAL FOR DIAGNOSIS

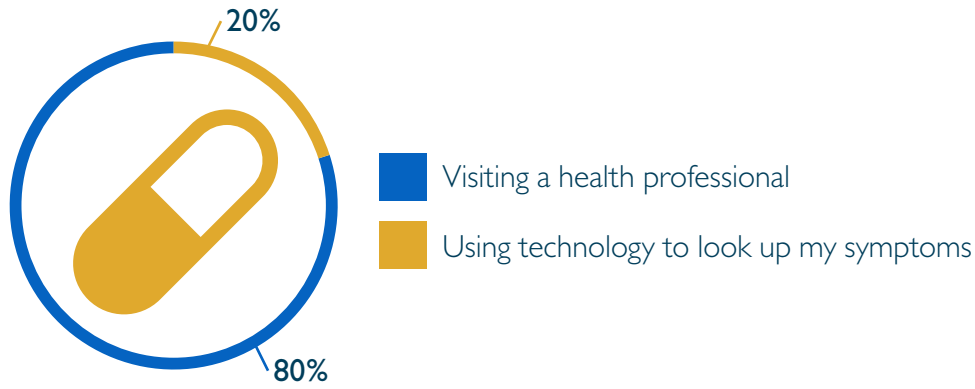
The reality remains that when we feel ill, the most common port of call is still our GP, with 29% of UK adults saying that this is the first place they turn in non-emergency situations. Despite Google being the second most common port of call, with only 16% of UK adults going online to diagnose their symptoms it does not appear that the GP surgery is in any danger of shutting down any time soon. More importantly, 78% of us find calling our GP useful in diagnosing our symptoms or (at the least) reassuring us about our health, with more than half of us (51%) saying that a phone call to the GP is very useful. This compares with less than a fifth of us who find searching online useful, meaning that while online searches are the second most common port of call, they are the fourth most helpful source of information.

FIGURE 3.1 USE AND USEFULNESS OF DIFFERENT CHANNELS WHEN FEELING UNWELL



Furthermore, when we asked people to choose between waiting to see a healthcare professional or looking up their symptoms online, 61% said that they would always prefer to discuss their health with a doctor – even if it meant waiting for an appointment. Individual contact with healthcare professionals is obviously still highly valued and, as Figure 3.1 demonstrates, appears inextricably linked to the positive outcomes that result from such contact. The overwhelming majority of us still find that most of our health problems are solved by visiting a healthcare professional.

FIGURE 3.2 **THE MAJORITY OF MY HEALTH PROBLEMS ARE SOLVED BY...**



However, as with so many of the other things that we have explored in this report, when we look at how different age groups are choosing to engage with healthcare services, we start to see a shift away from GP's waiting room. As Figure 3.3 demonstrates, the use of GP surgeries differs significantly between those aged under and over 40 – with less than a fifth of those under 40 saying that they turn to their GP first when feeling ill.

In fact, the use and usefulness of some channels appears to flip almost completely when we compare these two age groups side-by-side. For example, if we look at the usefulness of online forums and mobile apps in diagnosing symptoms or providing reassurance we can see that over 40% of those aged under 40 find them useful, compared to less than 25% of those aged over 40 (see Figure 3.4). The younger those surveyed, the starker the contrast becomes. Our data shows that those aged between 20 and 29 are two times more likely to search online or use their peer network (friends and family) to discuss health and wellbeing than to consult a healthcare professional.

FIGURE 3.3 USE OF DIFFERENT CHANNELS WHEN FEELING UNWELL BY GENERATION

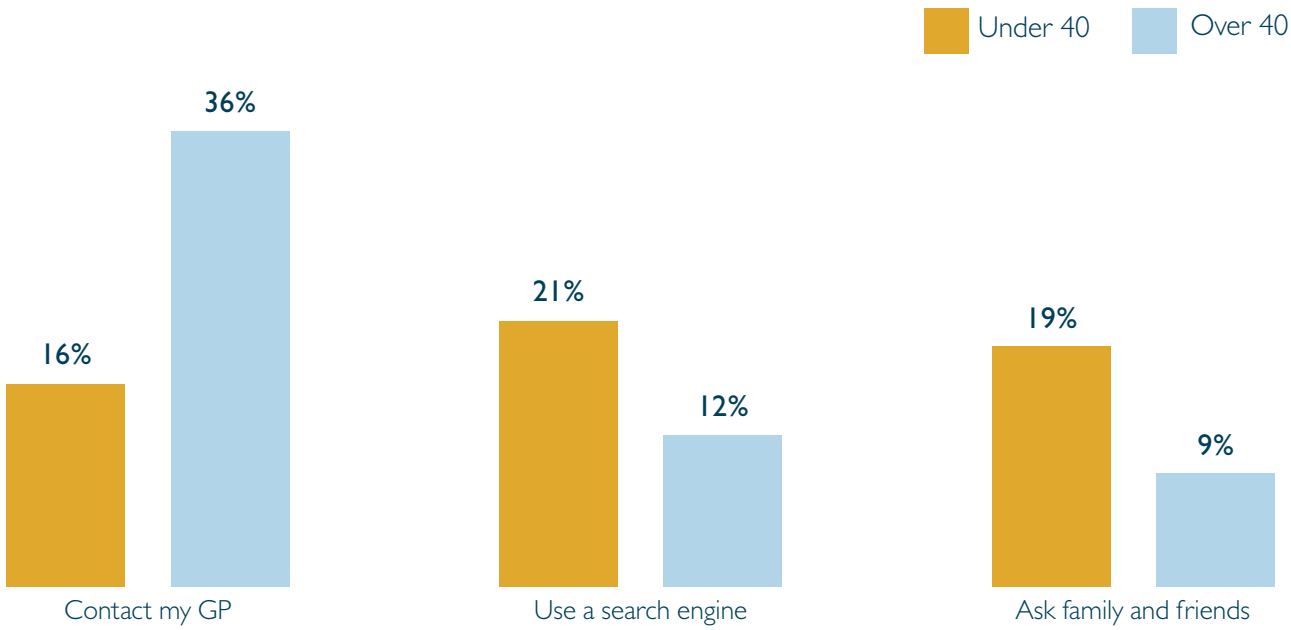
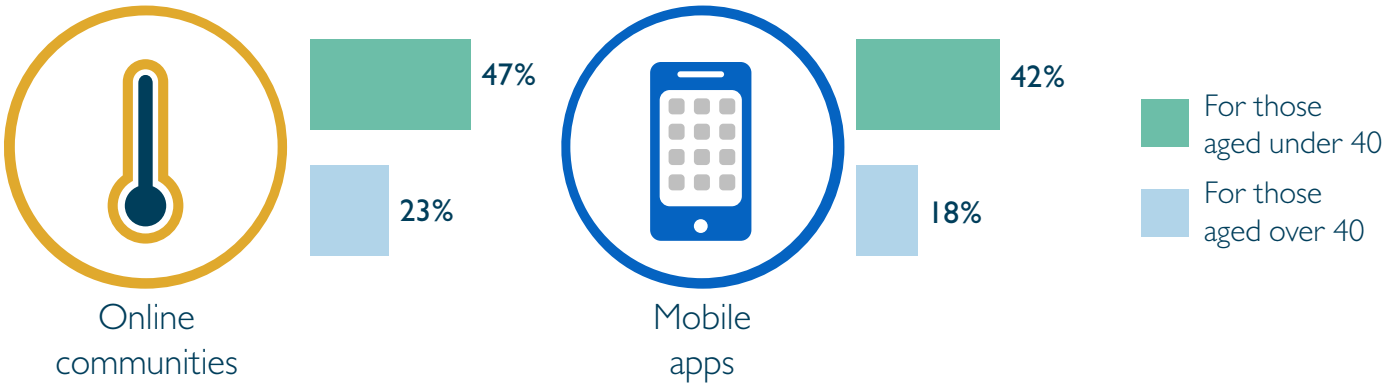
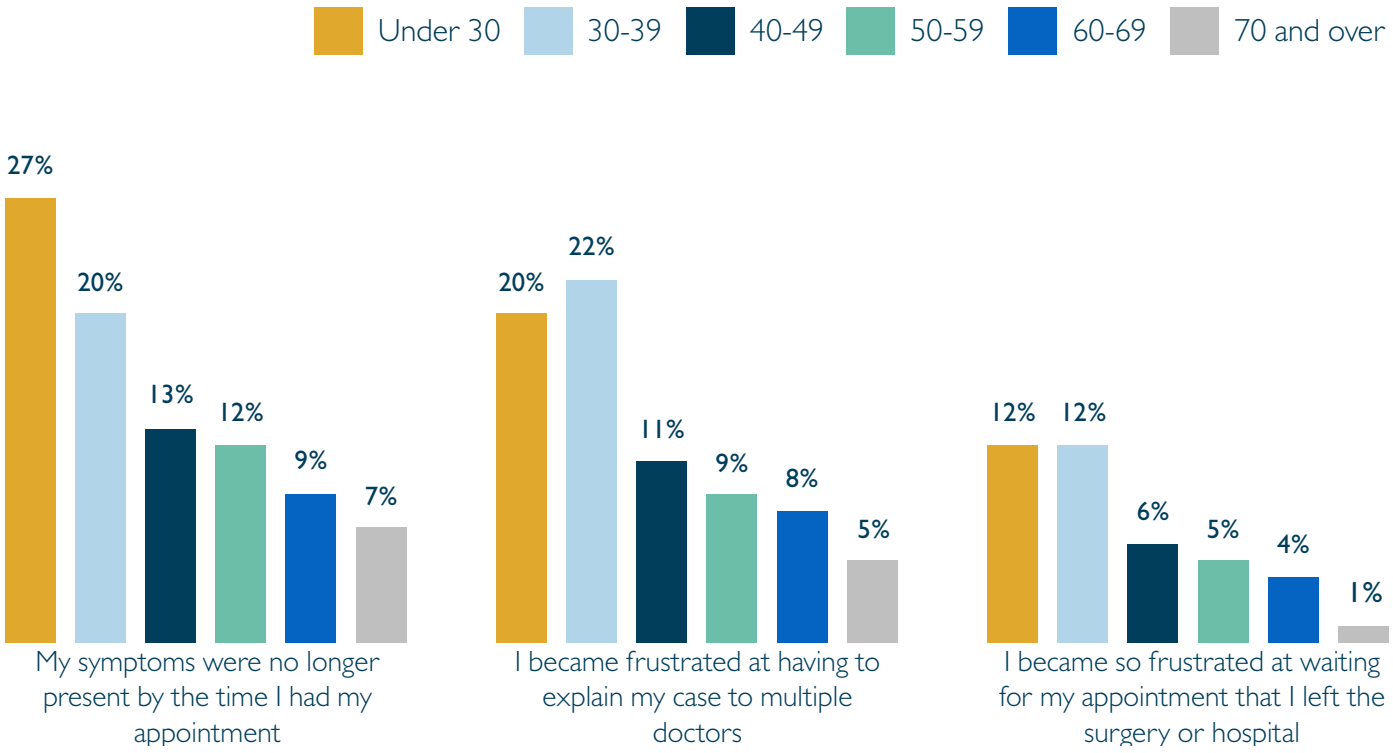


FIGURE 3.4 USEFULNESS OF DIGITAL CHANNELS BY GENERATION



Now, while it is true that younger generations are less likely to suffer from serious or prolonged illnesses that might lead them to call on their GP more frequently, our data also suggests that this transition towards faster and more easily accessible sources of information is also due to frustrations with the healthcare system itself.

FIGURE 3.5 **FRUSTRATIONS WITH PRIMARY CARE SERVICES BY GENERATION**



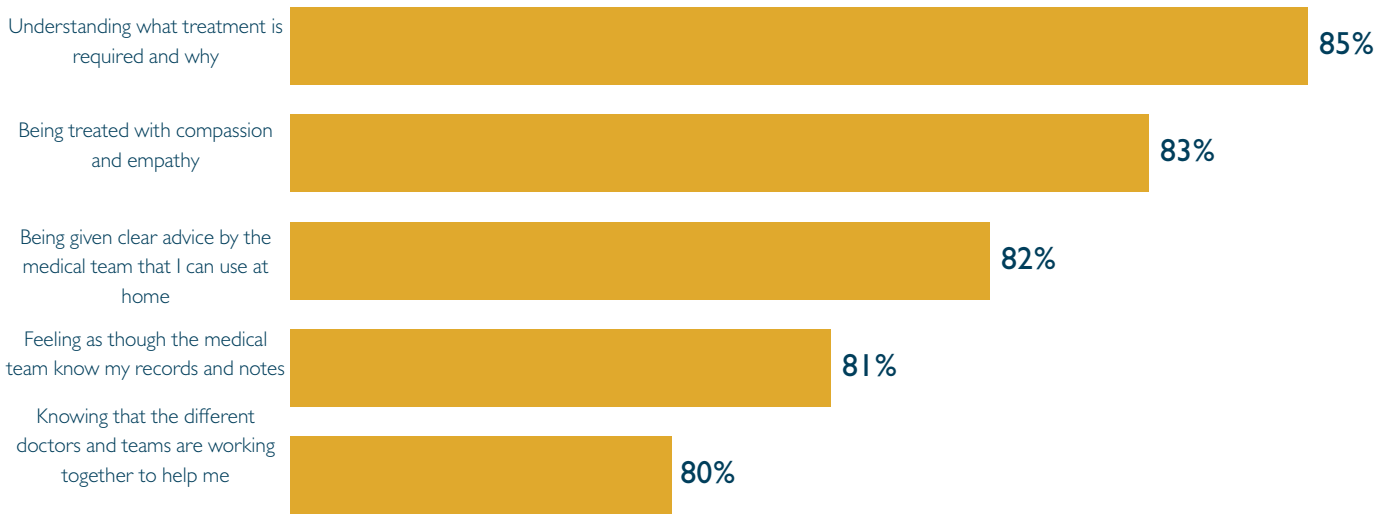
In an age where consumers are becoming used to having access to information and solutions at their fingertips, the notion of waiting up to two weeks for a healthcare appointment can seem rather alien. [3] As Figure 3.5 demonstrates, these waiting times are also creating areas of frustration for younger patients that may be driving them towards other sources of medical advice and intervention. 27% of those aged under 30 said that their symptoms had subsided by the time of their appointment, while 20% said that they became frustrated at having to explain their case to multiple doctors. But perhaps most importantly, at a time when GP surgeries are operating at (or over) capacity, more than one in ten of those aged under 40 have become so frustrated at waiting that they have left the surgery or hospital. This represents an excellent opportunity to use technology to realise enormous cost savings, at the same time as reducing frustrations with health service provision and freeing up resources for those in desperate need.

INCREASING EXPECTATIONS FROM HEALTHCARE

In almost every industry, the rise of consumer purchasing power has led organisations to adapt and change their business models to respond to the changing expectations and needs of consumers – helping them to maintain their competitiveness in an ever-changing market. It is relatively easy to measure the effectiveness of these changes by measuring the impact on market share, overall revenue and brand value. For the healthcare sector, however, identifying the most effective changes and measuring them are not always as easy. Rather than being driven by consumer choice, demand for public health services is driven by human need, and measuring success based solely on survival rates or reductions in complications often misses the qualitative outcomes from health intervention – such as quality of life. Identifying the right opportunities to improve services, therefore, requires health providers to engage with patients and understand their expectations from a human perspective.

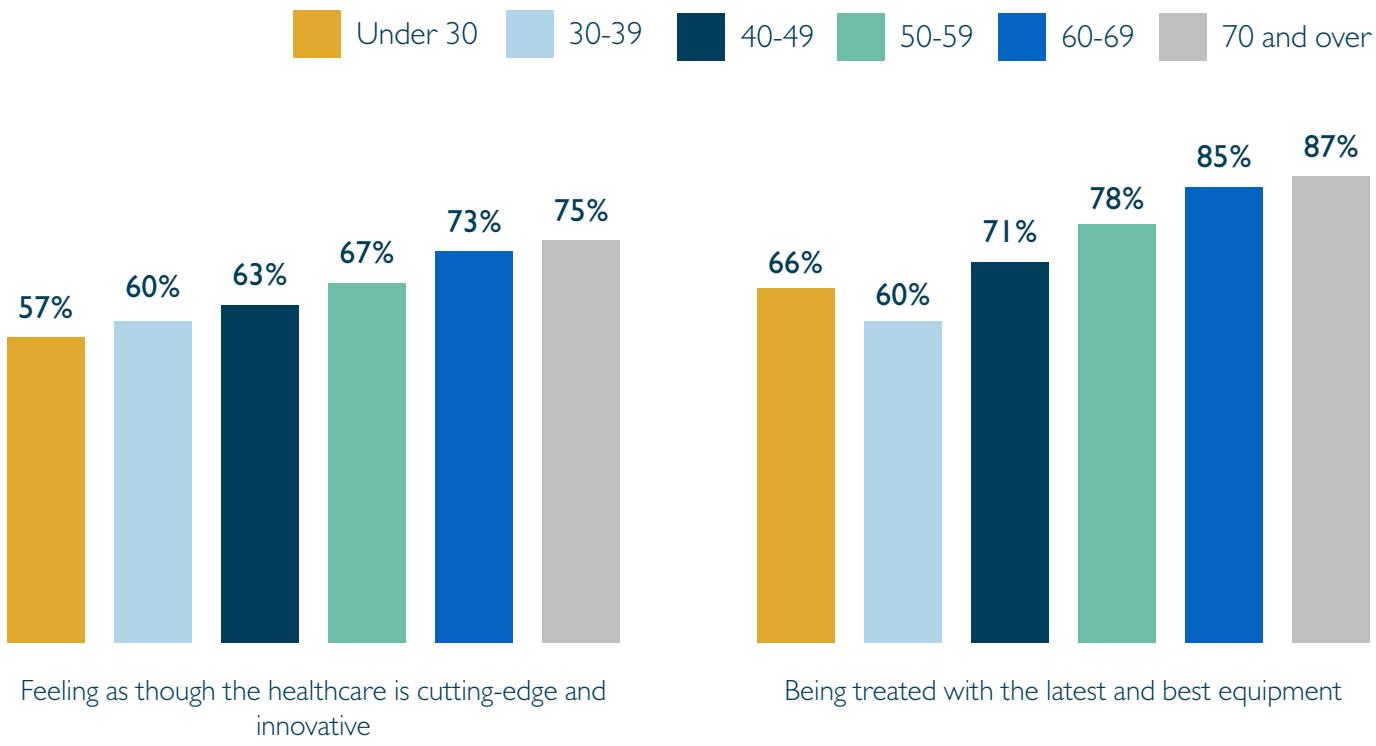
Outside of cleanliness of hospital environments and accessibility to services, the most important expectations that consumers have from healthcare delivery are:

FIGURE 3.6 CONSUMER EXPECTATIONS FROM HEALTHCARE DELIVERY



Coming just below these expectations was the need to be treated with the latest and best equipment, with 73% of UK adults saying that this is an important factor in healthcare delivery. In addition, more than a third (65%) of UK adults say that it is important for them to feel as though their treatment is cutting-edge and innovative. While one might expect that younger patients are keener for healthcare to feel more innovative and cutting-edge, when we look at the data by age group the opposite is the case. As Figure 3.8 demonstrates, over 80% of those aged over 60 expect to be treated with the latest and best equipment, compared to 66% of those aged under 30. In addition, nearly three quarters of those aged over 60 want to feel as though their healthcare is cutting-edge, compared to just over half of those aged under 30.

FIGURE 3.7 ATTITUDES TOWARDS INNOVATIVE HEALTHCARE BY GENERATION



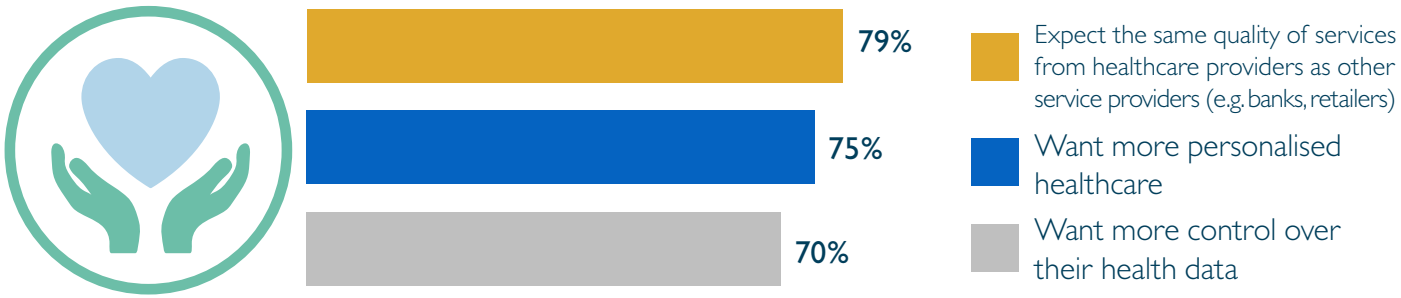
And it is not only here that expectations towards healthcare differ significantly. Our findings also show that nearly two-thirds (65%) of those aged over 60 feel it important to be able to be treated from home, rather than be admitted to hospital. This is in comparison to less than half (44%) of those aged under 30. More importantly, 62% of those who suffer from or care for someone with a long-term condition agree that being able to be treated from home is an important aspect of how healthcare is delivered.

These results are intriguing because they show a reversal of roles across our age groups. Younger generations, more up-to-date with the latest developments in technology, are more able to adopt technology-driven tactics to manage their health and wellbeing – but do not have the first-hand experience or need yet to anticipate their future health requirements. Whereas older generations, who (for the most part) have greater experience of health services, are in a better position to judge how important it is for them to be treated in a way that reassures them and allows them to have a higher quality of life.

TAILORING CARE TO THE INDIVIDUAL – PERSONALISED HEALTHCARE

One area where technological innovation has impacted consumer lifestyles and industries the most is in the ability to deliver personalised services that address individual needs. In the retail sector, the personal shopper has been transformed from a dedicated professional to a series of online recommendations based on your recent purchases and browsing habits. And while no one is suggesting that healthcare providers start to replace frontline staff with data-driven super computers (not yet, at least), our findings do suggest that there is a significant appetite for personalised healthcare services.

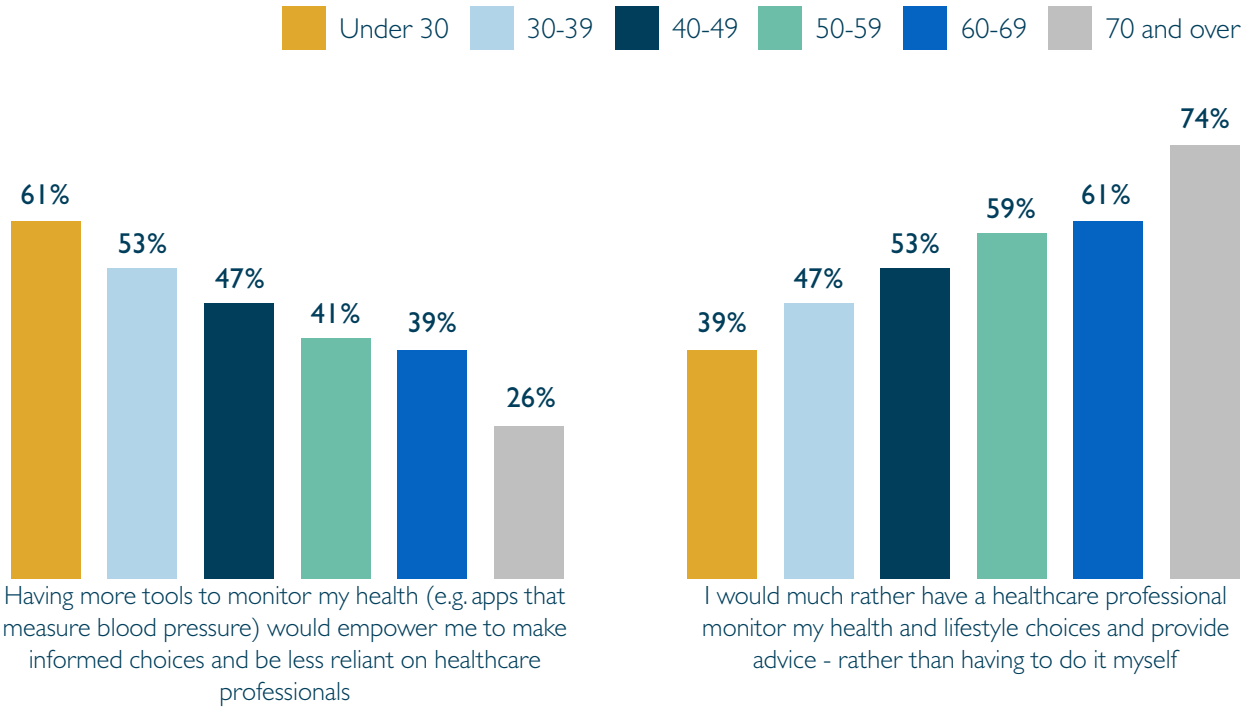
FIGURE 3.8 **PERSONALISED HEALTHCARE SERVICES**



In fact, 75% of UK adults want to have more personalised healthcare services that directly address their needs. As with innovation in healthcare, the expectation of personalised healthcare increases with each successive generation – over 80% of those aged over 60 would like greater personalisation. More than three quarters (79%) of those who suffer from or care for someone with a long-term illness would like greater personalisation of healthcare services.

This call for greater personalisation is accompanied by a desire to have more control over our own health data, so that individuals can better manage their health and wellbeing. 70% of UK adults would like to have more power over their health data, with women and those who suffer from or care for someone with a long-term illness the staunchest supporters (73% and 74% respectively). And when we offered respondents a clear choice between having more tools to monitor their own health versus having a healthcare professional do it for them, we found that those aged under 40 would choose greater personal empowerment around their own healthcare (see Figure 3.9).

FIGURE 3.9 **ATTITUDES TOWARDS PERSONAL EMPOWERMENT BY GENERATION**



This echoes our earlier findings that younger generations are taking greater steps to monitor and manage their health and wellbeing on a sustained basis. But it also highlights an enormous opportunity for healthcare providers to leverage the desire for personal empowerment to reduce hospital visits and free up resources for those who require in-patient and sustained treatment. By partnering with developers to create tools that provide a comprehensive overview of their health – and take steps when necessary to prevent illness – healthcare providers will be able to ensure that younger generations of patients are receiving accurate medical advice, while also allowing them to manage minor illnesses in the community.

INCREMENTAL INNOVATION AND THE SMALL VICTORIES

But developing new toolkits and launching them takes time and investment. The fact is that efficiencies and cost savings can be delivered now through minor innovations that make healthcare provision more accessible, more responsive and more connected. In Figure 3.10, we show the provision of different online services by GP surgeries (as reported by our participants). These figures show that only around a third of GP surgeries in the UK currently offer online appointment booking or reminders – with London one of the poorest served regions in the UK. One in ten GP surgeries offer online health check reminders, such as reminding patients when immunisations are due to be updated or when regular health checks should be repeated.

FIGURE 3.10 ONLINE SERVICE PROVISION BY GP SURGERIES

44%
Online prescription renewal

36%
Online appointment booking and management

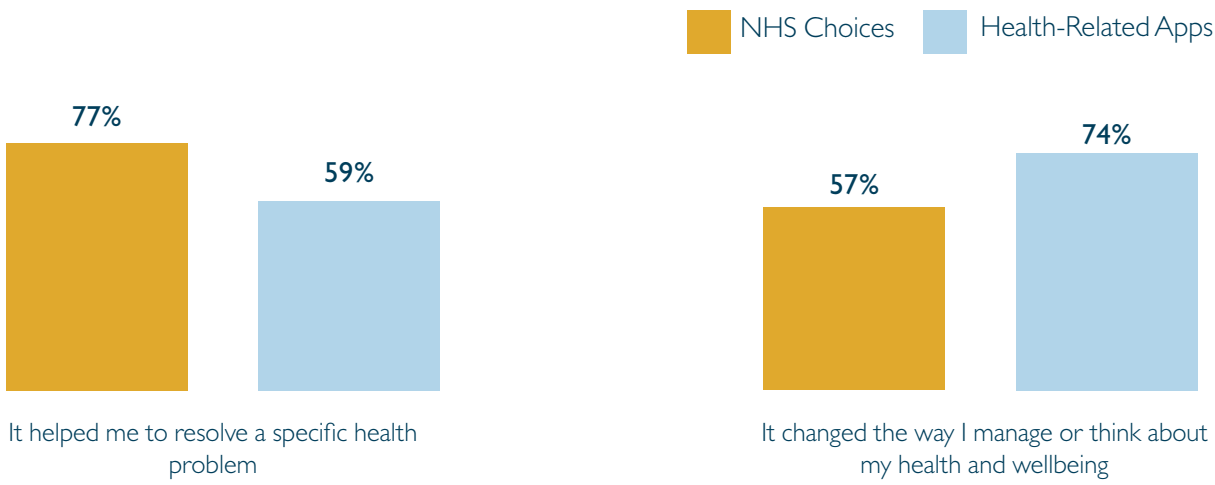
31%
Appointment reminders by SMS or e-mail

10%
Online health check reminders

9%
Online access to health notes or records

Given that missed appointments are estimated to cost the NHS nearly one billion pounds a year, rolling out online appointment booking platforms to a wider range of GP surgeries has the potential to lead to enormous cost savings across the health service.[4] The introduction of online health check reminders, too, will aid the development of a preventative healthcare system by ensuring that patients check-in with their healthcare professional on a regular basis – rather than only visiting their GP once potentially complex intervention is required.

FIGURE 3.11 **COMPLEMENTARY INTERVENTION**



Another area where immediate benefits can be realised is in recommending the use of health-related apps alongside online resources, such as NHS Choices. While our earlier findings showed that health-related apps are effective in creating a sustained change in lifestyle behaviour, they are not as useful in resolving a specific health problem. In contrast, online resources such as NHS Choices are extremely effective at resolving a specific health problem, but less effective at driving behavioural change. Connecting these services together, therefore, would enable healthcare providers to positively impact patient health and wellbeing from both an interventionist and preventative perspective.

People Powered Health

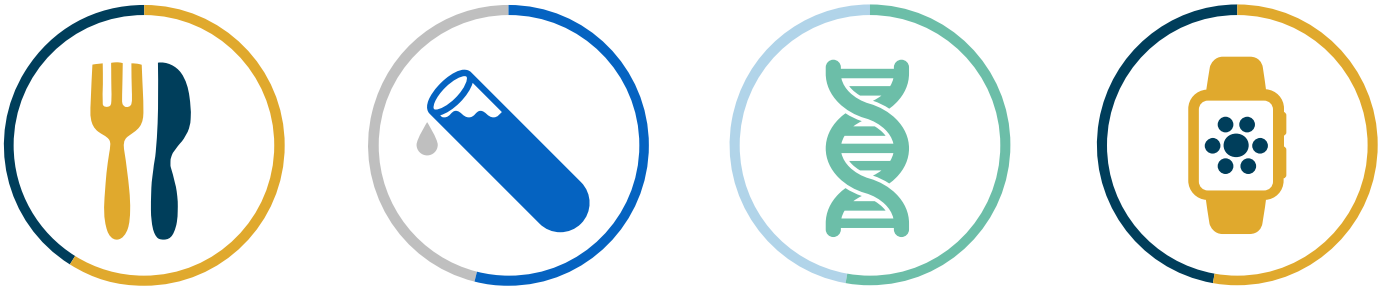
HEALTH INNOVATION IS INCREASINGLY DRIVEN BY CITIZENS

In our final section, we seek to understand how healthcare and technology providers can deliver the next generation of healthcare services by understanding the barriers to engagement and the appetite for change that exist, among the general public. What our findings demonstrate is that there is a growing body of engaged citizens across the UK, citizens who are becoming increasingly conscious of the benefits that data-driven healthcare can provide and who are ready to collaborate with healthcare providers to deliver better outcomes through people powered health.

TRENDING TOWARDS PREVENTION - AN APP(LE) A DAY

In the debate over whether prevention is more important than treatment in protecting health and wellbeing, 80% of UK adults side with prevention. But a belief in prevention as an effective policy is ineffective unless it is accompanied by sacrifice and change. When we asked those who felt prevention was more important than treatment what personal data they would surrender to make prevention a reality, we found that more than half were willing to part with personal information about their health.

FIGURE 4.1 DATA THAT THE PUBLIC IS WILLING TO SHARE TO AID PREVENTION



59%
Information on eating habits and diet

54%
Information submitted to a doctor using an in-home testing kit (eg. blood tests)

53%
Access to a DNA profile that highlights potential health risks

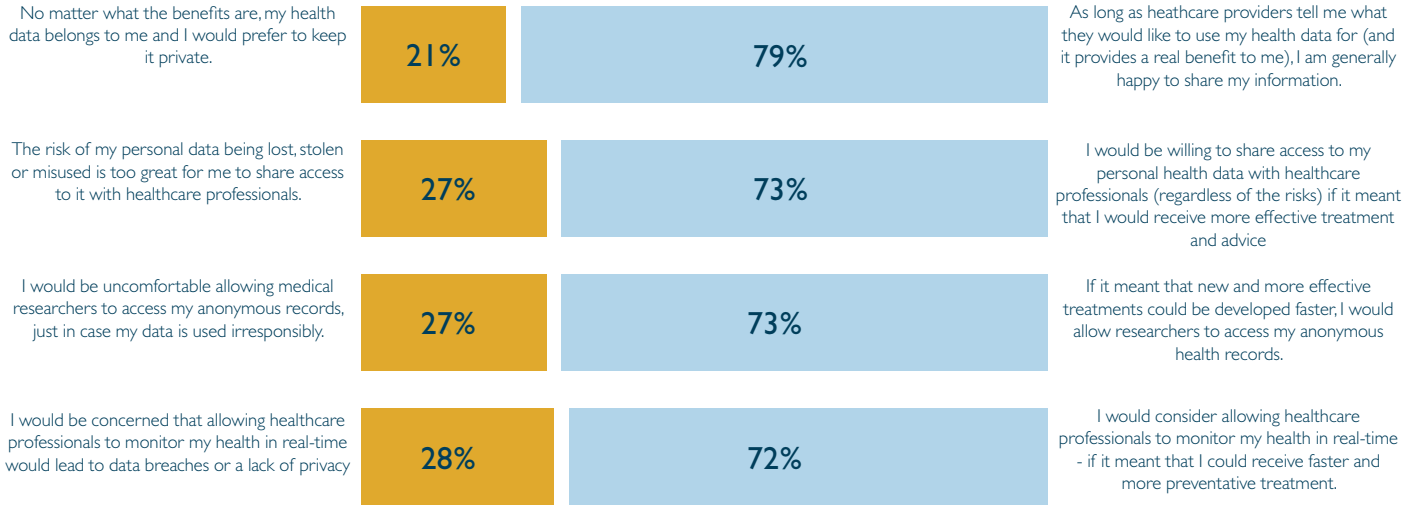
53%
Access to real-time health information collected by a wearable device or app

A MOVE TO SHARING DATA FOR PERSONAL GAIN AND THE WIDER PUBLIC GOOD

Almost 60% would share information on their eating habits and diet, while almost half of us (49%) would share information on our drinking habits. Most surprising of all, however, is the fact that more than half of us would be willing to share data derived from DNA profiling, in-home testing kits or real-time wearable health monitors with a healthcare professional.

Going further, 73% of UK adults say that they would be willing to share access to their personal health data with a healthcare professional if it meant more effective treatment and advice – regardless of the risks to their data being lost or stolen. A further 72% say that they would consider allowing healthcare professionals to monitor their health in real-time as long as it meant they could receive faster and more preventative treatment. This willingness to provide access to our health data even extends to the research community, with 73% saying that they would allow medical researchers to access anonymised health records if it meant that newer and more effective treatments could be developed faster.

FIGURE 4.2 PUBLIC ATTITUDES TOWARDS THE BENEFITS ON HEALTH DATA

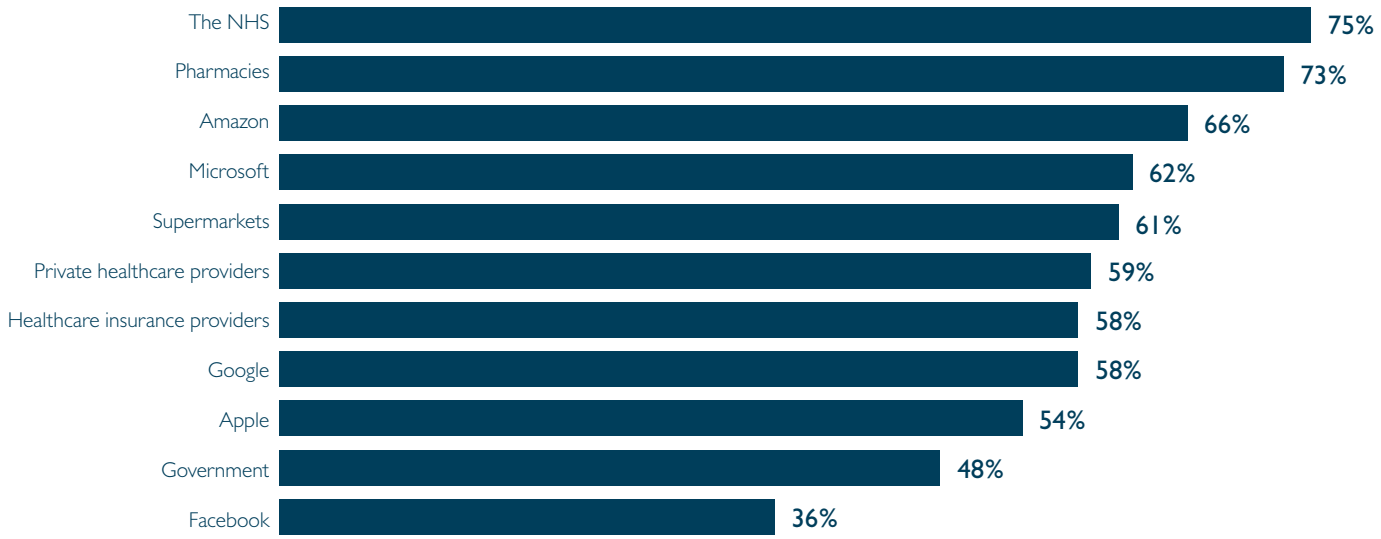


All of these results demonstrate that when patients are provided with a choice around the future of healthcare, their preference is to choose the outcome that generates the most benefit – no matter the potential personal risks to their data. It suggests a remarkable appetite for data-driven innovation in healthcare and demonstrates that, as long as the benefits are communicated, the overwhelming majority of UK adults are willing to trade their data for better services.

TRUSTING THE NHS TO INNOVATE WITH PERMISSION TO EXPERIMENT

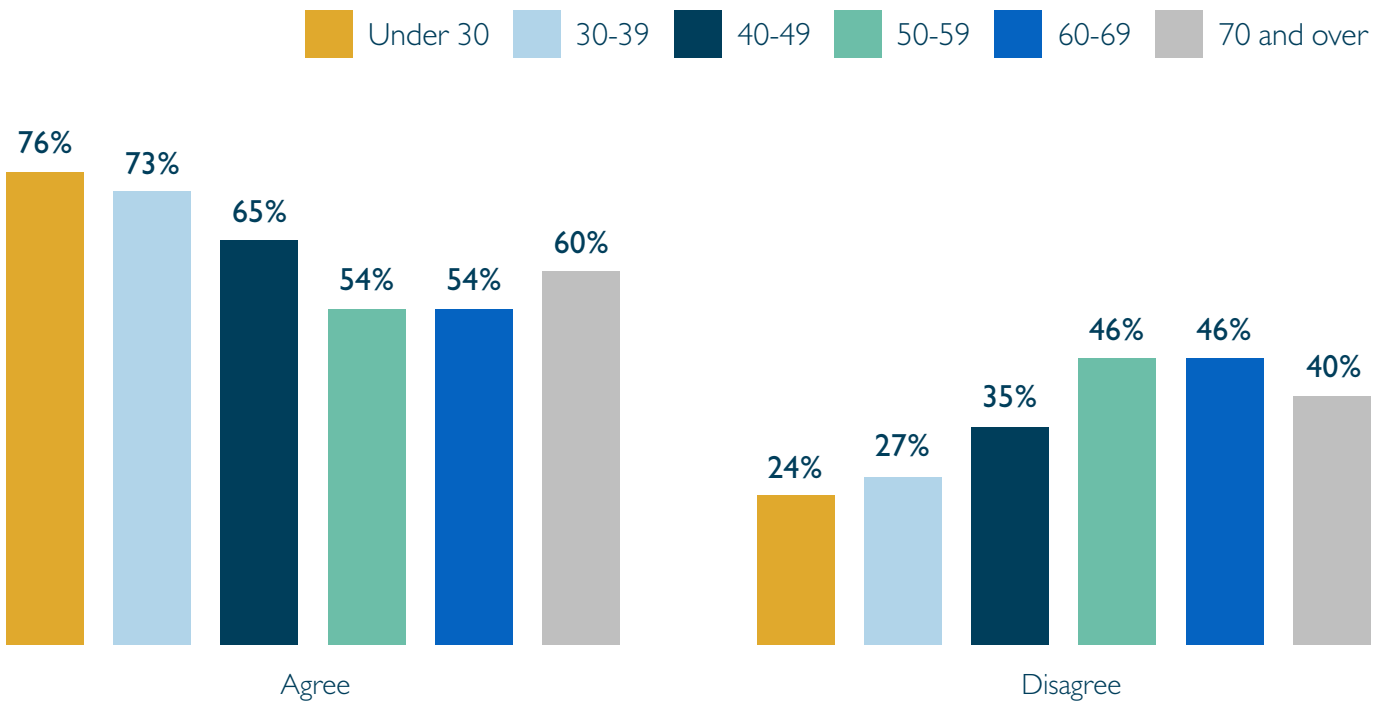
Despite the debates around data security and data privacy that dominate the technology sector, healthcare providers should feel licensed to innovate using digital technologies and patient data for two reasons. First, because our research reveals that most healthcare providers operate in a totally different sphere of influence when it comes to being trusted with data (see Figure 4.3). The NHS and pharmacies are the most trusted organisations when it comes to using our data responsibly and keeping it secure. Undoubtedly, this reputation has been built steadily over decades through the careful management of patient data and respect for individual privacy. And while these principles should remain at the centre of any data strategy in the future, it should not limit the usefulness or benefit that can be derived from the data that is collected.

FIGURE 4.3 TRUST IN EACH ORGANISATION TO USE PERSONAL DATA RESPONSIBLY AND KEEP IT SECURE



This is because the second reason is that the majority of the public would like to see an increased commitment to innovation across healthcare services. When we asked UK adults whether they believe the potential benefits of embracing innovation in the NHS (such as reduced costs and improved patient outcomes) outweighed the risk of sensitive data being abused, lost or stolen, 68% agreed that the benefits outweighed the risks. The majority of UK adults appear to support greater risk taking by the NHS in search of major innovations that will improve health and wellbeing (see Figure 4.3).

FIGURE 4.4 "HEALTHCARE PROVIDERS SHOULD INVEST IN GAME-CHANGING INNOVATIONS THAT WILL IMPROVE PEOPLE'S HEALTH, EVEN IF THE COST IS HIGH AND THERE IS A CHANCE OF FAILURE."



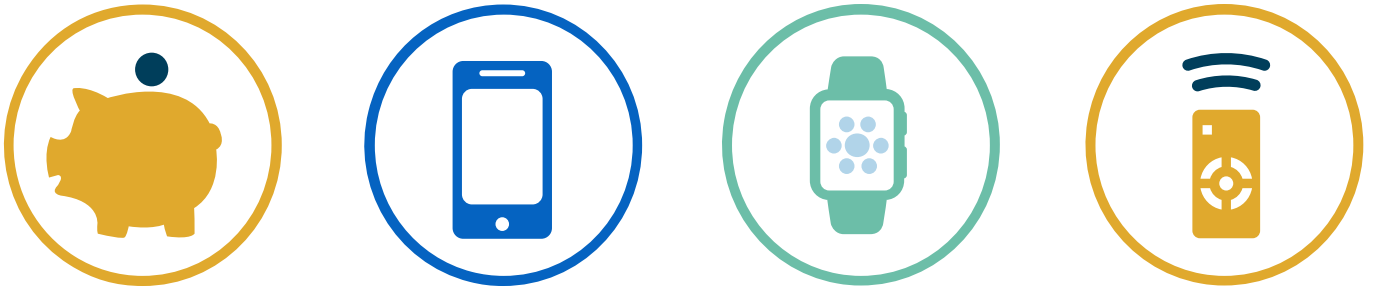
For those younger generations who have grown up in a world where innovation has increased in pace and aspiration, and where technology is enabling larger scale disruption across major industries (such as driverless cars in the automotive sector), there is an enormous appetite for game-changing innovation in healthcare. At the same time, there is a sober recognition that these innovations will not always pay off. But the importance of being aspirational innovators, searching for radical ways to change services for the better, is something that the vast majority of the UK public believe in.

The public have given permission for healthcare providers to play in innovation; it is now up to the industry to decide how it can best move forward.

EMPOWERING THE UNEMPOWERED THROUGH AWARENESS, COMMUNICATION AND EDUCATION

Given that the public would like to see greater innovation in healthcare and that we have identified a number of areas where technology could be used to provide greater complementary and preventative intervention in health and wellbeing, what are the required enablers of innovation?

FIGURE 4.5 COSTS AS A BARRIER TO INNOVATION[5]



£18,640 per annum
Median UK wage
(after tax)

£459
Cost of an Iphone/
Galaxy S6
- Equivalent to 9 days' work

£249
Cost of Fitbit/
Apple Watch
- Equivalent to 5 days' work

£199.99
Cost of Nest/
Smart devices
- Equivalent to 4 days' work

The first and most obvious area will be to reduce the cost of technology in subsequent generations to provide universal accessibility to technologies that can improve health and wellbeing. Over half of UK adults state that cost is a barrier to purchasing new forms of technology – a figure that rises to 60% when we look at those who suffer from or care for someone who suffers from a mental health condition. Greater investment in technological innovation and greater refinement of mobile technologies (such as smartphones and wearables) will help to reduce the cost of individual devices in the future. In Africa, for example, we can already see a 'race to the bottom' as multiple manufacturers release smartphone devices costing less than $50 in a bid to capture the enormous mobile market in the continent. [6] However, as with most things, the overall cost of devices will only start to decrease as the volume of the market increases. This requires early and significant investment, but also a firm understanding of the needs of patients and the public, to ensure that any major innovations are able to address the largest market possible.

However, there is no use in developing new technologies unless people are aware of the benefits and are confident enough to use them. The history of technological innovation is full of ideas that were 'before their time', useful innovations that ultimately failed because users were not ready for them, the sector was unable to fully support them or organisations failed to communicate the benefits. For a full decade before the iPad was launched, numerous tablet and hybrid devices had been developed – each failing to capture the imaginations of the public.

At the beginning of this report, we discovered that being unable to see the benefits of technology was one of the major barriers to adoption. But while there is a clear need for innovators to communicate the use case around new technology, our research also shows that developers and healthcare providers also need to empower groups of citizens to use technology in a more confident and assured way.

FIGURE 4.6 CONFIDENCE IN USING NEW TECHNOLOGY BY GENERATION

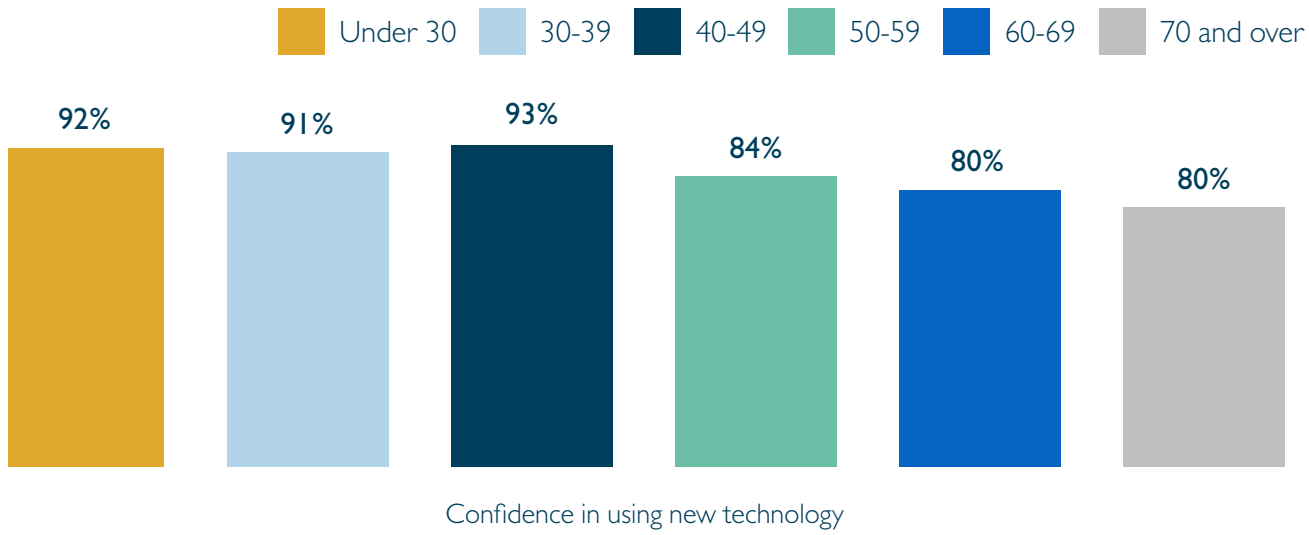
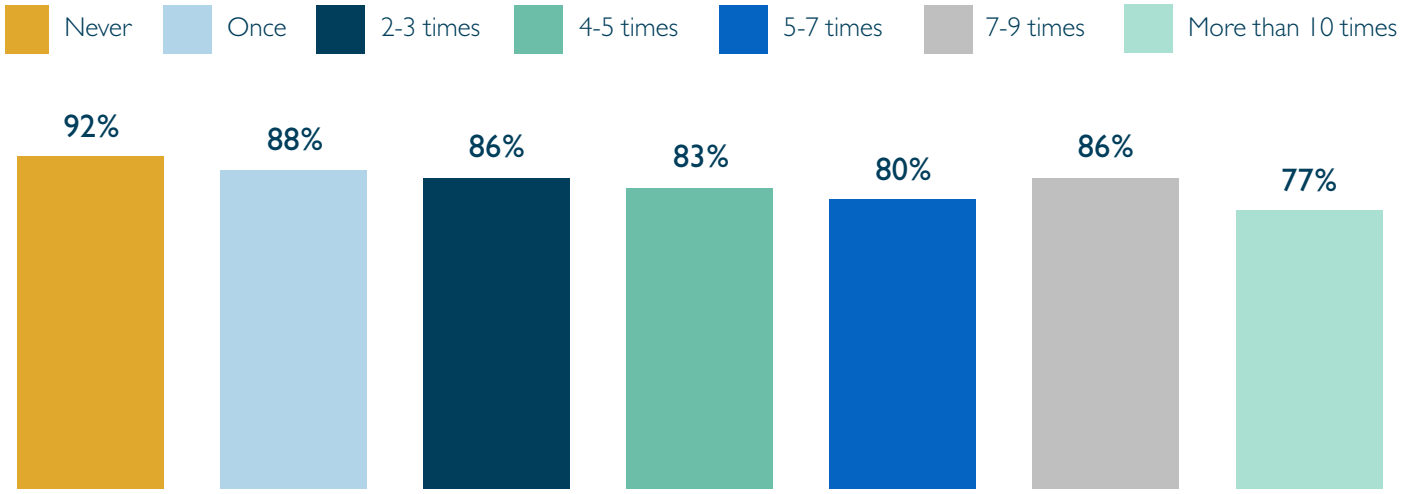


FIGURE 4.7 CONFIDENCE IN USING NEW TECHNOLOGY BY FREQUENCY OF NHS USE IN PAST YEARS



In order for digital health initiatives to have an impact now, we need to provide education and awareness for small groups of older generations, but also those who are frequent and heavy users of health services, who do not currently feel empowered when using technology. Other sectors are already starting to understand the importance of up-skilling their customers and have put initiatives in place to improve digital inclusion. There is the same need for education and empowerment in the healthcare space. Up-skilling the public so that they are better able to manage their health and wellbeing in their homes has the potential to reduce incidences of disease and long-term illness, improve efficiency in the healthcare sector and improve patient outcomes at the point of care by liberating clinical resources and providing more targeted data for clinicians to consider in diagnosis.

Closing thoughts

HARNESSING THE FULL POTENTIAL OF PEOPLE POWERED HEALTH

We hope that this report provides plentiful food for thought for a wide range of stakeholders who each have a role to play in health innovation. It is clear from our research that technology is driving a change in behaviour today – with more people using it to take control of their lives. Our findings demonstrate how proactive digital citizens are already using technology as a central tool in managing their health and wellbeing. And with over 70% of them reporting that health-related apps are positively affecting their lifestyles and wellbeing, it seems that there are many lessons for us to learn as health innovators from these pioneering early adopters.

What is encouraging to see is the broad-base support from the public for the NHS, which they see as an essential innovator in healthcare services and which they trust implicitly with this monumentally important task. With 75% of us wanting to see more personalised and preventative healthcare, and over half of us willing to share our DNA profiles with health professionals to achieve these aims, it seems that the public are sending a clear signal to public health providers. You are not alone in this effort, and citizens are ready to lend their support to game-changing innovations that deliver tangible benefits.

For innovators and investors, our findings point to the importance of understanding what people really want from their health and how technological innovation can be used to meet their needs. These innovations need to work in the existing system of care and support that people already access in order to have real impact on their lives. The desire for greater personal empowerment creates significant opportunities to re-define the dynamics of healthcare delivery, but innovation needs to happen across healthcare networks in tune with the real needs of patients, their families and their supporting communities.

Achieving this will require collaboration across multiple stakeholders, whether in the public or private sectors, in order to create the sort of game-changing innovations that can harness the untapped potential of people powered health.

Technical Appendix

RESEARCH METHODOLOGY

Opinium conducted three separate online surveys between 28 August and 4 September 2015. Each of these surveys was conducted among a nationally representative sample of over 2,000 UK adults. The results have been weighted to reflect nationally representative criteria across gender, age and region in the UK. In this report, the results are referenced as one survey for ease of reading. Despite each survey achieving a marginally different distribution of respondents by age, gender and region, the applied weights effectively negate any differences for reporting purposes.

In our survey, we asked respondents to tell us how many times they have visited their GP, Accident and Emergency or any other hospital department as a patient in the past twelve months. This information has been used to segment our sample into low, medium and heavy users of healthcare services. We also asked respondents if they suffer from – or care for someone who suffers from – a number of medical conditions. This information has been used to identify respondents who suffer from or care for someone with a long-term health condition.

ADDITIONAL SOURCES

[1] Sourced from the Economist.
http://www.economist.com/news/leaders/21645180-smartphone-ubiquitous-addictive-and-transformative-planet-phones

[2] According to Ericsson's latest Mobility Report.
http://www.ericsson.com/ericsson-mobility-report

[3] Information on average GP waiting times.
http://www.telegraph.co.uk/news/nhs/11583896/Average-GP-waiting-times-will-hit-two-weeks-family-doctors-predict.html

[4] Estimated cost of missed GP appointments.
http://www.bbc.co.uk/news/uk-33375976

[5] Median income after tax in 2013. Prices sourced from product websites and correct at time of printing.
https://www.gov.uk/government/statistics/distribution-of-median-and-mean-income-and-tax-by-age-range-and-gender-2010-to-2011

[6] MTN launches $50 smartphone in South Africa.
http://www.zdnet.com/article/sub-50-android-smartphone-hits-south-africa-as-mtn-launches-steppa/

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LANSONS HEALTH

Lansons Health helps healthcare organisations get round challenges and develop opportunities in an environment undergoing significant change. The healthcare market is growing at a rapid pace but innovative new players are entering the space and established firms need to evolve their business models very quickly as a result of technological and consumer pressures.

Lansons Health works with the team at Lansons, tapping into their award-winning expertise in strategic consultancy, organisational change and reputation management in the corporate sector, and brings fresh thinking to understanding and solving client problems through partnering with the health innovation community, including academia, tech entrepreneurs, mobile health start-ups, patient advocates and behavioural scientists.

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