

COVID-19: **DIGITAL HEALTH** **TRENDS &** **OPPORTUNITIES** **FOR 2021**

ANALYSIS OF DIGITAL HEALTH USAGE FROM JANUARY 2020 TO JANUARY 2021

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DIGITAL HEALTH. UNLOCKED.

COVID-19: Digital Health Trends and Opportunities for 2021

In 2020, amidst the coronavirus pandemic health and care services accelerated digital adoption plans as they established new ways to deliver services. Digital health also came into the public consciousness, as across the world, we searched for remote ways to monitor and manage our health and wellbeing.

As we enter 2021 and the 'hardest yet' weeks of lockdown amid surging cases and patient numbers, digital health will continue to offer a safe and effective way of delivering remote support to the vulnerable.

Throughout the pandemic, ORCHA has been there for our health and care partners, evaluating and distributing digital health solutions, to make sure only safe, secure and effective solutions have been used.

ORCHA provides support to NHS services in 50% of regions and to national bodies across the world from Norway to New Zealand, serving a population of ~20 million. This reach gives ORCHA unique insights into exactly how the UK, and world, is engaging with digital health. Each quarter since March 2020, when self-isolation, lockdown measures, and remote health and care came into effect, we have shared our insights, revealing the needs and behaviours of the population.

In this report, we share our insights into digital health usage in 2020 as a whole, including what populations and professionals have searched for, and how this has evolved. We reveal the most popular apps recommended and favoured by health professionals, in addition to the most popular apps downloaded by the population. We also anticipate what lies ahead for 2021.

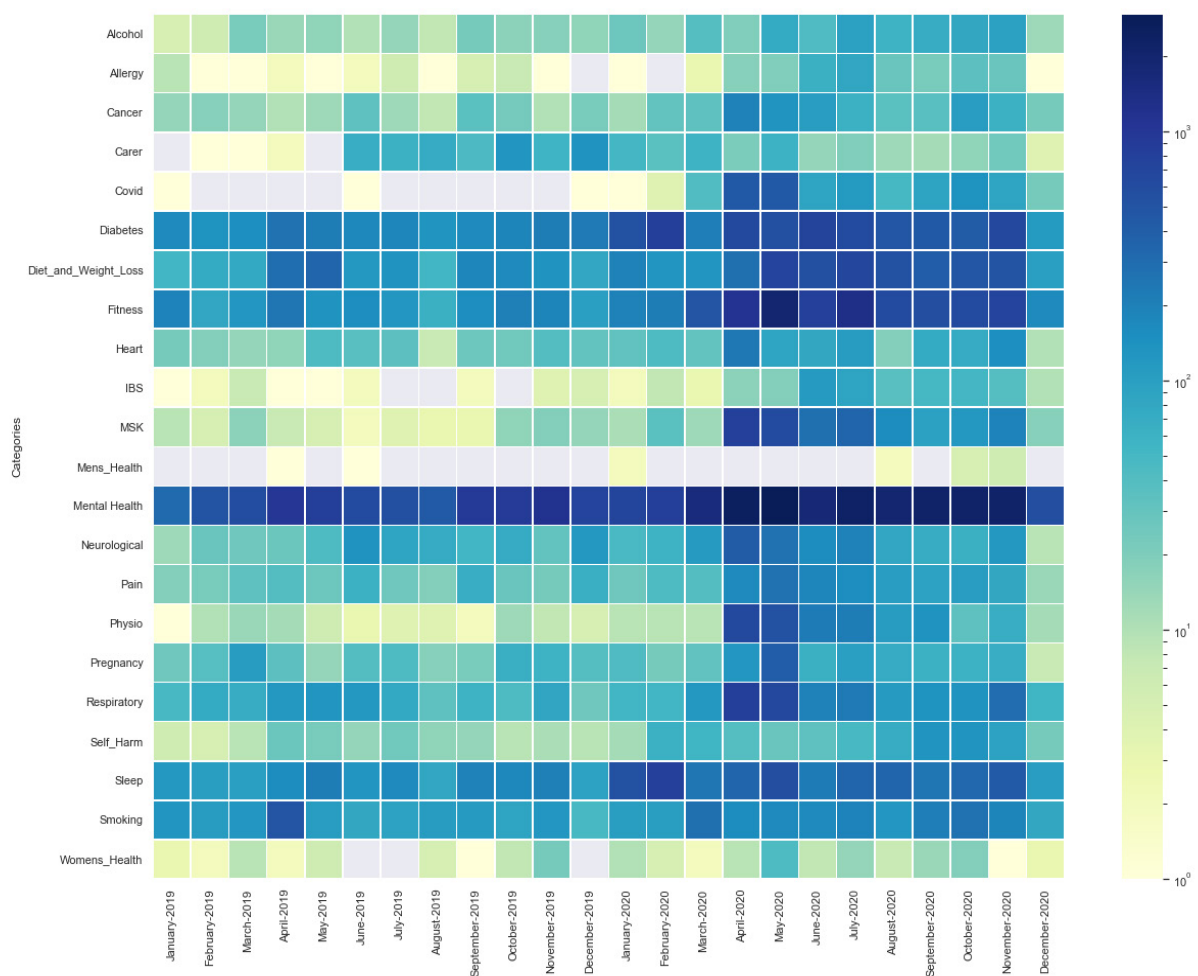
We hope this report helps health and care organisations to share learnings and further unlock the power of digital health.

2020 Digital Health Usage Trends

The ORCHA platform and its search data is an insightful way to explore trends in digital health, providing insight into the search activity of health professionals and the population.

To gain a good perspective on how usage has changed during the pandemic, we have looked back over the past 24 months, starting before COVID-19. We believe this provides a credible baseline, with 15 months of app search and download data prior to COVID-19 lockdown measures.

We can share the trends visually on a heatmap, shown below. Reading from left to right follows chronologically, month by month since January 2019 for each condition area. Each cell contains the volume of searches for each topic and is colour coded from pale yellow, where there are fewer searches, to dark blue, where the greatest search volume lies. Note: We used a log scale here to highlight some of the smaller changes which otherwise were not as visible.



This perspective reveals the point at which digital health accelerated, with the shift occurring quickly around March 2020, which of course, for many, was the date when the first lockdown began. This demonstrates the speed at which digital health was identified and embraced as a solution to remote care needs, and the increasing difficulties in accessing face-to-face care.

An encouraging sign is that this shift has been maintained ever since, with adoption continuing to grow, both in numbers and across additional health areas. Usage clearly shows a sustained and increased growth among the public, and health care professionals, who are searching for safe digital health technologies.



Areas of highest demand

ORCHA's earlier COVID-19 trends report revealed that the initial demand for digital came from the immediate need for COVID-19 and respiratory digital health, followed by mental health aspects of COVID-19 and then onwards towards healthy living and exercise. We suggested that this may have been due to a potential shift away from immediate COVID-19 needs towards risk management and staying healthy.

Mental health has always been a top search query and can be seen back to January 2019. But looking again to March 2020, we can see a magnification of this which has continued into the end of 2020. This may have been fuelled by an increased prevalence of mental health concerns and increasing unmet needs for face-to-face psychological services due to the second lockdown in November and the cumulative effect of COVID-19. This may also be a reflection of growing awareness of digital health solutions within this space.

But digital health can contribute even more as part of mental health support. With many patients still not confident to contact mental health services, assuming they are no longer working or able to deliver a mental health service, clinicians report there has been an increase in hospitalisation for patients who have become very unwell, impacting already stretched secondary care mental health services. To relieve pressure, patients can be directed to great digital health services such as Silvercloud, Headspace, Clear Fear, Brightsky, Rootd, Feeling good, Happify, Think Ninja and My Possible Self, details of all of which can be found at www.orchha.co.uk/appfinder.

Another enduring need is the demand for weight management and fitness topics. These have also continued the trend from the last report and have stayed relatively high as compared to the other groups. This is understandable given local restriction on gym and leisure facility operations and the reality that an increasing number of us are spending more time at home, on our computers. This increase in searches may therefore reflect changing attitudes to the pandemic, as we move towards minimising risk, or a need to support fitness and weight management efforts during a time when access to health promoting services is limited.

Yet again, we are just scratching the surface of how digital health can bolster weight management services. For example, COVID-19 has meant less monitoring of diabetic patients, with less blood sugar monitoring, and a decreased awareness of complications which require face-to-face contact, while additionally longer-term services such as diabetic retinopathy screening have been delayed. Whilst there has been the ability to perform home blood glucose testing and visual inspections of feet using online video consulting technology, there are digital health solutions that if mapped to the patient pathway may provide opportunities for improved self-management at every stage.



Most recommended, favourited and downloaded apps of 2020

In this growing field, health and care professionals and consumers often share their experiences, and value hearing about others' experiences with health apps. To support this, we have gathered our top 5 lists of 2020. Firstly, those apps that healthcare professionals have directly recommended via email or text to a patient. Secondly, the apps health and care professionals are keeping in their favourites list on the ORCHA platform. Finally, the apps consumers and professionals have downloaded the most from an ORCHA app library.

Most Recommended apps by health and care professionals

- | | |
|--|---|
| <p>1.  Smoke Free
Smoking Cessation
Cost: In App Purchases</p> | <p>4.  Wysa
Stress and Anxiety, Relaxation Techniques, Cognitive Behavioural Therapy, Depression
Cost: In App Purchases</p> |
| <p>2.  NHS Weight Loss Plan
Healthy Living
Cost: Entirely Free</p> | <p>5.  Sleepio
Sleep Hygiene, Insomnia
Cost: In App Purchases</p> |
| <p>3.  Headspace
Stress and Anxiety, Relaxation Techniques, Sleep Hygiene
Cost: In App Purchases</p> | |

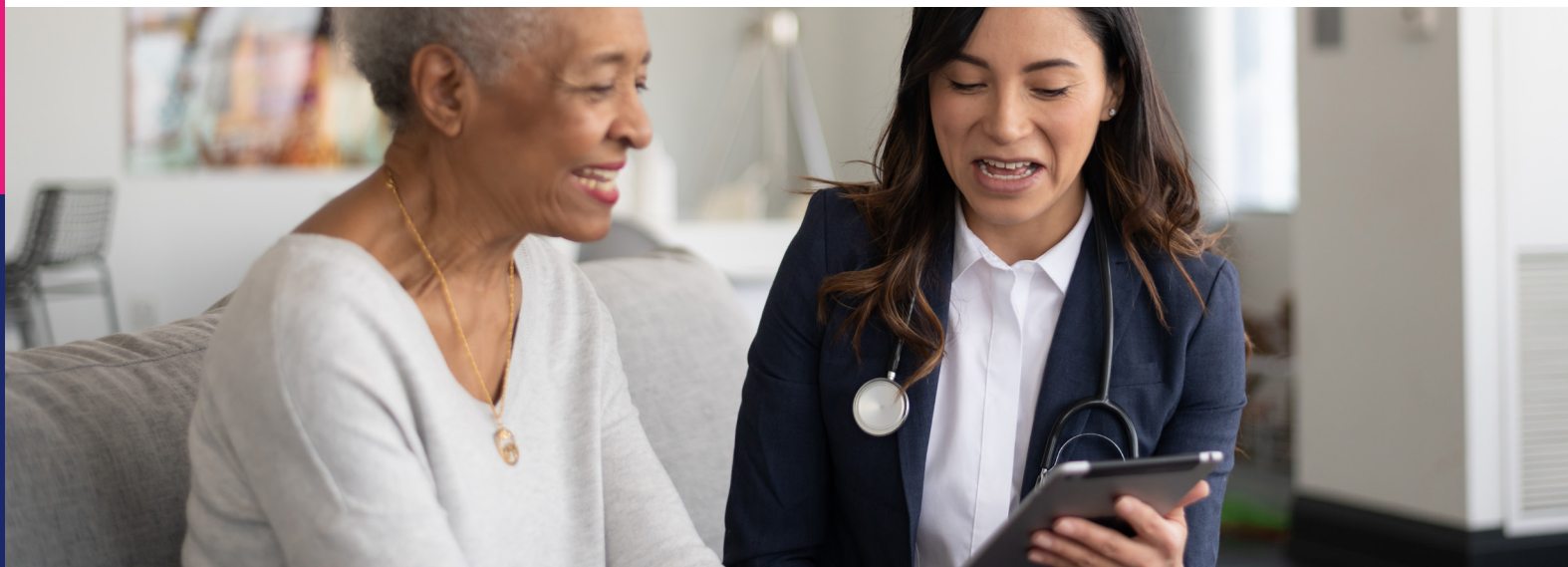
Most Favourited apps by health and care professionals

- | | |
|---|---|
| <p>1.  Wysa
Stress and Anxiety, Relaxation Techniques, Cognitive Behavioural Therapy, Depression
Cost: In App Purchases</p> | <p>4.  Sleepio
Sleep Hygiene, Insomnia
Cost: In App Purchases</p> |
| <p>2.  One You Couch to 5k
Fitness
Cost: Entirely Free</p> | <p>5.  Sidekick
Ulcerative Colitis, Crohn's Disease, Healthy Living, Relaxation Techniques, Sleep Hygiene, Rheumatoid Arthritis, Stress and Anxiety
Cost: Entirely Free</p> |
| <p>3.  Headspace
Stress and Anxiety, Relaxation Techniques, Sleep Hygiene
Cost: In App Purchases</p> | |

Most Downloaded apps in total

- | | |
|---|--|
| <p>1.  Wysa
Stress and Anxiety, Relaxation Techniques, Cognitive Behavioural Therapy, Depression
Cost: In App Purchases</p> | <p>4.  Low Carb Program
Diet and Weight Loss, Diabetes, Type 2 Diabetes
Cost: In App Purchases</p> |
| <p>2.  NHS Weight Loss Plan
Healthy Living
Cost: Entirely Free</p> | <p>5.  Lincus Companion
Diet and Weight Loss, Fitness, Diabetes, Stress and Anxiety
High Blood Pressure (Hypertension), Low Blood Pressure (Hypotension)
Cost: Entirely Free</p> |
| <p>3.  Smoke Free
Smoking Cessation
Cost: In App Purchases</p> | |

These lists are interesting as they show which apps are being considered by different groups, health care professionals and the public. A common theme amongst the nine apps listed above is that they all fall into the healthy living category of apps. This perhaps shows a common area where both health care professionals and the public feel that digital health products are effective. There is also a mental health aspect to six of these apps, which backs up the importance of digital we have seen in this area. It may also be a signal that apps that focus on mental health, like the healthy living apps, are being recognised as viable support tools.



2021 Outlook

Face-to-face treatment came to almost a complete standstill during the initial lockdown, and so we saw a rush towards digital health. Services had to change. Patients and professionals became much more accepting of virtual assessments than before. Attend Anywhere, Zoom, Teams and Hangouts have become mainstream communication tools. Apps such as Sleepio, Calm and Couch to 5k became household brands.

Some embraced this change, whilst others found it a real challenge. As we enter another wave of national lockdowns, although health services remain open, there are still efforts to treat people remotely. Now, and when life slowly comes back to a new normal, we must continue to harness digital health to address the health and service issues left by COVID-19 and not lose the gains that digital health has provided over this period.

For example, maternity and women's health services have been massively affected. Services now see backlogs, including long referral and waiting times. And still many patients don't want to 'bother' services. We're yet to make up for these delays, let alone see the long-term impact on women's physical and mental health.

To gain additional benefits from digital, services must go beyond conferencing, to digital solutions that unlock greater personalisation, monitoring and engagement of patients. Digital solutions offer even greater reward when integrated into services, not bolted on. Services significantly affected by COVID-19, but where health app adoption is relatively low, such as cancer services, should seek out health apps that can support patients.

As with all tech projects it is very rarely about the kit but about changing culture. Digital health is still dominated by beacon NHS organisations that have put the testing, activation and governance tools in place, plus health and care professionals who are digital enthusiasts.

There are more and more clinicians who have been won over by digital and have gone from total cynic to learner and advocate. NICE has introduced guidance to those looking to introduce digital health within behaviour change services. In 2021, we anticipate that following the rapid expansion of digital health more structures will be put in place to ensure a robust longstanding use of digital health, including:

- Procurement: As digital health is a new product area, a clear and appropriate commissioning system for purchasing digital health is required. This will enable health and care professionals to prescribe digital health tools that have been tested and meet standards, with a procurement framework in place and for the developer to receive remuneration.
- Education: Although 93% of health professionals believe health apps can improve a patient's health, the majority have not been trained in this field and so do not use digital health as part of routine practice. Trust is a major barrier. To address this, education on the use of specific digital health tools will increase, supported by reassurance around governance steps.

With greater maturity of digital health, and evidence of the impact it can make, it will be adopted across all of the national health priorities. This means there will be continued use in weight management and mental health services, but we will also see a growing use of digital health in fields not yet actively adopting digital, including services for cancer, cardiovascular disease, maternity and neonatal health and stroke.

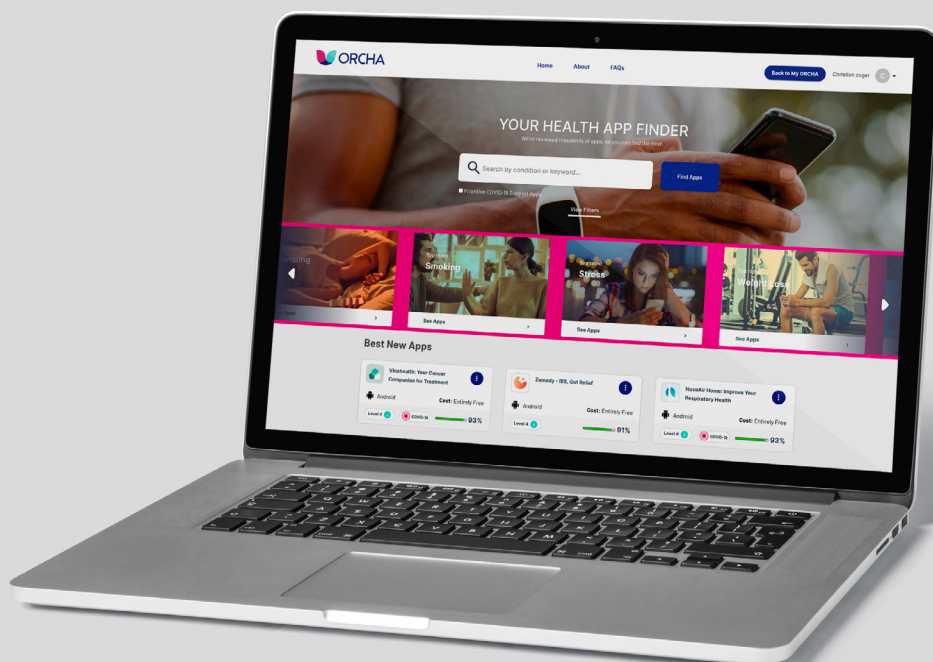
It is paramount that services build on the tech skills they have had to quickly learn, to integrate more digital services into existing pathways, so that together we can mitigate the short- and long-term effects the pandemic has had on delivering our services and continuing to strive to deliver better health to everyone.

About ORCHA

ORCHA is the world's leading independent digital health assessment and distribution organisation. Our vision is to revolutionise care through the safe integration of digital health solutions into all aspects of health and care services, leading to more patient-centred, effective care. ORCHA provides tailored app accreditation, app library and prescription services, and helps organisations across the world to integrate health and care apps safely into practice.

You can now search ORCHA's App Library by simply going to besthealthapps.com

To find out how ORCHA can help you, please get in touch.



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