

A woman with short blonde hair is looking down at a smartphone. She is wearing a striped shirt and a gold necklace. The background is blurred, showing a green plant and a window. A pink circular graphic is in the top right corner.

DIGITAL TRANSFORMATION FOR EVERYONE

Ensuring more adults experience
the benefits of NHS online consultations



THIS REPORT WAS DEVELOPED
BY VISIBA IN NOVEMBER 2020.

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Visiba was founded on the strong conviction that digitisation is inevitable if healthcare is to offer equal, qualitative and safe services in the future. Visiba has customers in five different markets and the platform is used in many different healthcare operations, from integrated care to primary care and secondary care.

Our goal is to provide outstanding digital solutions which support clinicians to deliver the best care, improve patient outcomes and drive transformation across populations and pathways.

Our platform is:

- Easy to use, with a patient satisfaction score of 98%
- Familiar, by being a white-labelled solution branded to the NHS provider
- Secure, offering recognised encryption methods, and is an NHS Trusted Partner
- Developed and refined with the end user in mind, by involving both patients and health care professionals in the development process
- Reliable, with a 99.9% uptime

With a vision of using digital technology to allow healthcare services to improve people’s lives, in depth experience of digital transformation, and the ability to work alongside healthcare organisations’ expertise and abilities, Visiba is a reliable partner which always puts the customer’s success first.

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EXECUTIVE SUMMARY

Middle-aged and older adults fail to access benefits of digital health consultations in lockdown

- 2 in 3 people aged over 50 did not have an online consultation with a healthcare professional during the first lockdown
- People over 50 are missing out on the benefits of online consultations despite high levels of tech use
- Digital platform providers offer a solution to counter the barriers people face in uptake, including user experience and centricity, security, and provider familiarity

The findings of a Kantar Sifo survey, commissioned by online digital health platform Visiba, of 1,050 adults across England, show only one in three (33%) people aged over 50 accessed an online consultation¹ with a healthcare professional between March and August 2020.

People under 30 were the most likely to have had an online consultation with half (50%) of all 18-29-year-olds reporting accessing healthcare digitally. This is juxtaposed against trends for healthcare access in general, where young people access healthcare the least and this contact increases with age.

Lack of NHS use during the pandemic could be in part down to an element of social responsibility among some adults

who, during the first national lockdown, felt duty-bound not to access healthcare to ‘protect the NHS’. Making sure we reach this population will be critical in preventing their future health needs and pressures on the NHS, and doing so will require prioritising user experience, familiarity with providers, and security. There also needs to be enhanced training and support for change management within the NHS so that healthcare providers can also reap the benefits and support the user experience.

People turn to online appointments because they limit the risk of infection. They also increase access to care and offer greater flexibility by reducing travel and wait times. Moving forward, people want to be able to see different types of providers via online consultation, and they want platforms to continue to become more user-friendly.

People’s positive perceptions of online appointments are generally influenced by whether they have had an online appointment, so it is critical they are offered and encouraged to use consultations that will be appealing to them and supported throughout the process.

Whilst progress is being made in access to digital healthcare, these findings show that some of the adult population is not yet being reached through digital healthcare transformation.

1. Online consultations were defined as any kind of contact with healthcare services taking place online via video chat or messaging

THE NHS AND ITS DIGITAL TRANSFORMATION JOURNEY

A ‘digital first’ NHS is one of the central goals of the NHS policy document, The NHS Long Term Plan, published by NHS England in 2019 with the aim of setting a clear vision for the future of the NHS. The Long Term Plan states the aim to move one in three outpatient appointments online, eventually moving to a ‘digital first’ model, with savings both to the NHS and the individual.²

Ultimately it is a vision for how the NHS can lead on the digital transformation programme it needs.

Both the Government and NHS England have made it clear that, despite the progress made over the three years prior to the publication of the Plan, and the collective action taken by the NHS and its organisations to move the transformation agenda forward, much more needs to be done.

The NHS has a series of key digital targets to reach as set out in the Plan:

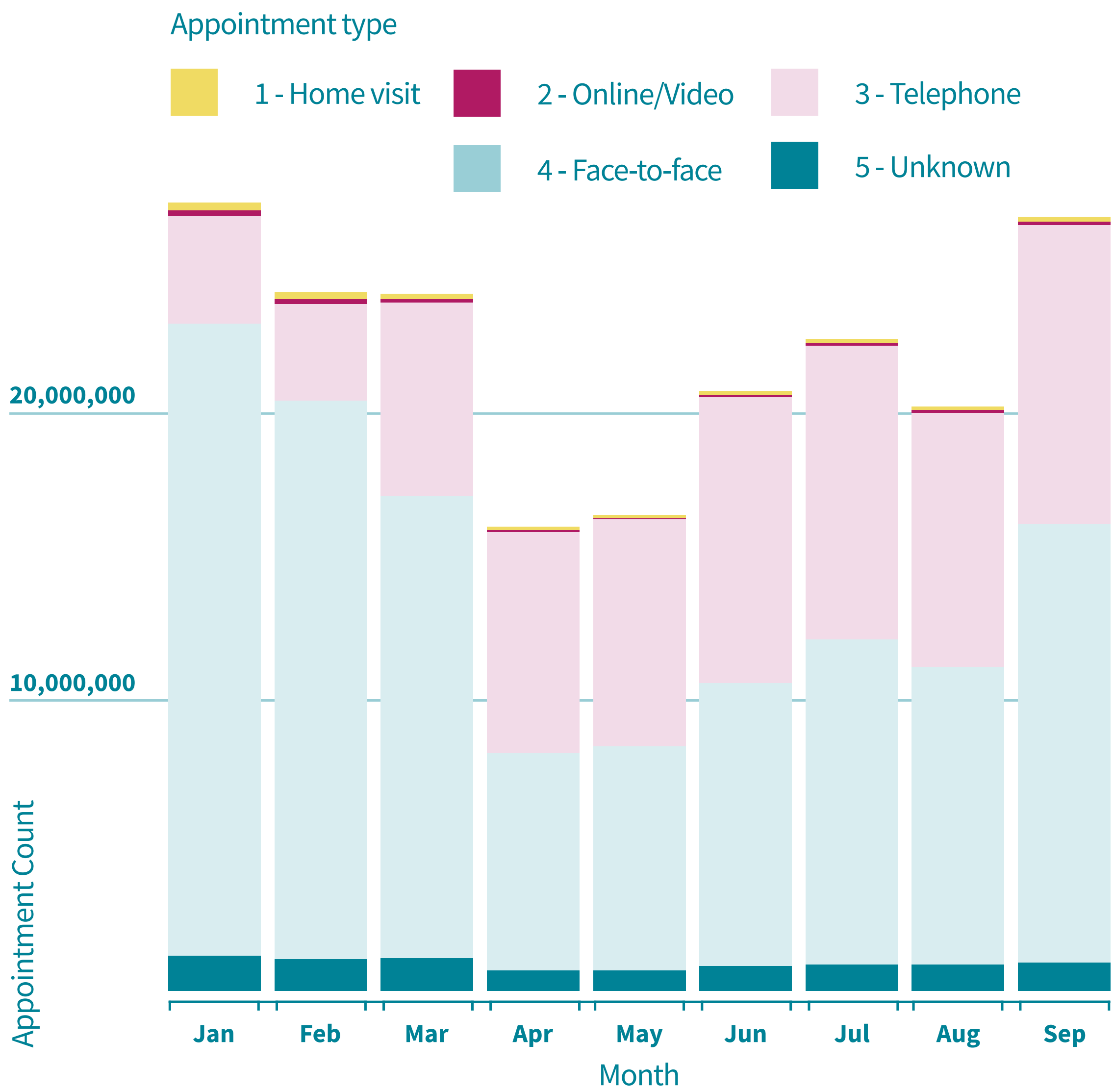
- Over the next ten years the NHS in England will offer a ‘digital first’ option for most people, allowing for longer and richer face-to-face consultations with clinicians where patients want or need it
- By 2023/24, every patient in England will be able to access a digital first primary care offer
- All patients will have access to their care plan and to communications from their care professionals via the NHS App by 2021/22
- The NHS App will ‘create a standard online way’ for people to access the health service and will work ‘seamlessly with other services at national and local levels’
- A Chief Information Officer (CIO) or Chief Clinical Information Officer (CCIO) should be on the board of every Integrated Care System (ICS) by 2021/2022
- By 2024, secondary care providers in England, including acute, community and mental health care settings, should be fully digitised, including clinical and operational processes across all settings, locations and departments. Data will be captured, stored and transmitted electronically, supported by robust IT infrastructure and cyber security, and LHCRs [Local Health Care Records] will cover the whole country. Healthcare should be delivered at a time and in a way that suits the patient to provide them with more support for health management.

CORONAVIRUS AND THE RAPID SHIFT TO ONLINE CONSULTATIONS

The COVID-19 pandemic arrived against this backdrop and has brought about rapid digital change in the NHS in a very short space of time. At the beginning of the UK’s first lockdown in March 2020, patients were told to ‘protect the NHS’ and healthcare services had to seek alternatives to face-to-face appointments.

In February 2020, 81% (19,228,991) of GP appointments were face-to-face, whereas in April 2020 only 47% (7,480,101) were face-to-face and the number of all appointments dropped from 24 million to 16 million. While total appointments started to increase in July, reaching 22 million, only 52% of these were face-to-face. An increasing number of consultations also moved to the telephone, which has also driven the shift away from face-to-face appointments.

**GP APPOINTMENTS BY APPOINTMENT
TYPE, JANUARY TO SEPTEMBER 2020**



In September 2020, Visiba commissioned Kantar Sifo to survey 1,050 people demographically and regionally representative of England. They were asked about their perceptions and behaviours regarding digital healthcare in light of the COVID-19 pandemic. The sample included those who had and had not used online consultations.



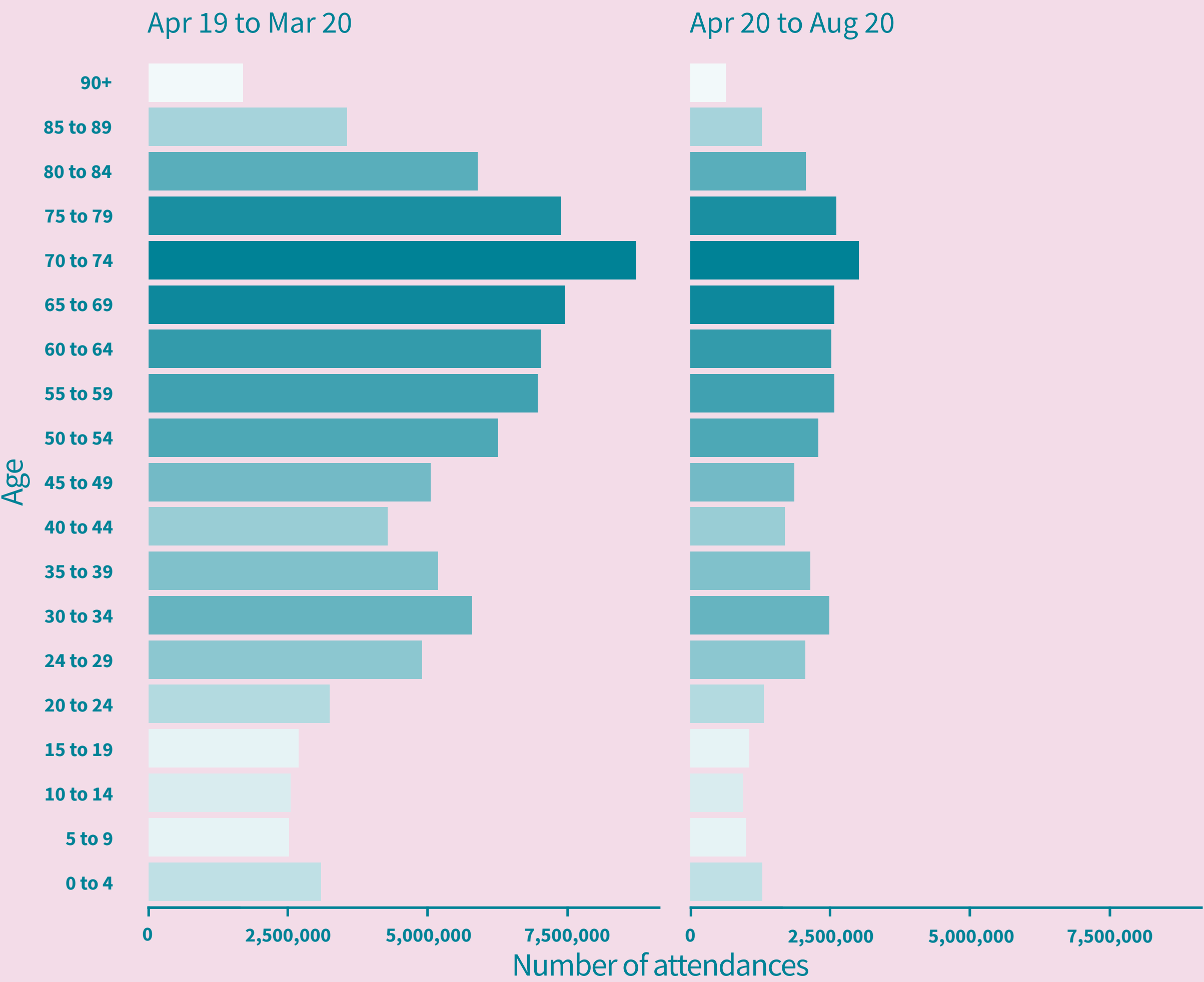
Digitally-enabled care will go mainstream across the NHS... Virtually every aspect of modern life has been, and will continue to be, radically reshaped by innovation and technology – and healthcare is no exception. The NHS is a hotbed of innovation and technological revolution in clinical practice.”

- The NHS Long Term Plan

WHO USES THE NHS?

Across England, use of the NHS generally increases with age and peaks among those aged 70-74. Outpatient attendances, for example, were highest among this age group both when considering the time period of April 2019-March 2020³, and across April 2020-Aug 2020⁴.

OUTPATIENT ATTENDANCES BY AGE GROUP



However, in the context of COVID-19, it's important to note that many people over 50 were unable to access healthcare services early on in the pandemic (between February and May 2020), according to the English Longitudinal Study on Ageing⁵. 1 in 6 people over 50 (3.6 million people) reported having hospital treatments cancelled, while 1 in 10 were unable to visit or speak with their GP⁶. According to the **Institute for Fiscal Studies, 14% of** those over 50 requiring GP care did not contact these services during that time⁷. This is likely to

drive future avoidable harms due to delayed treatments as well as people choosing to not seek or follow through with care. Even though looking at a measure like outpatient attendances shows the typical trend of increasing use with age throughout the pandemic, we know there is a portion of the population who were not accessing care, many of whom likely could have benefited from online consultations.



WHO IS HAVING ONLINE CONSULTATIONS?



In the six months prior to September 2020, two in five people had an online consultation, defined as any kind of contact with healthcare services taking place online via video chat or messaging.

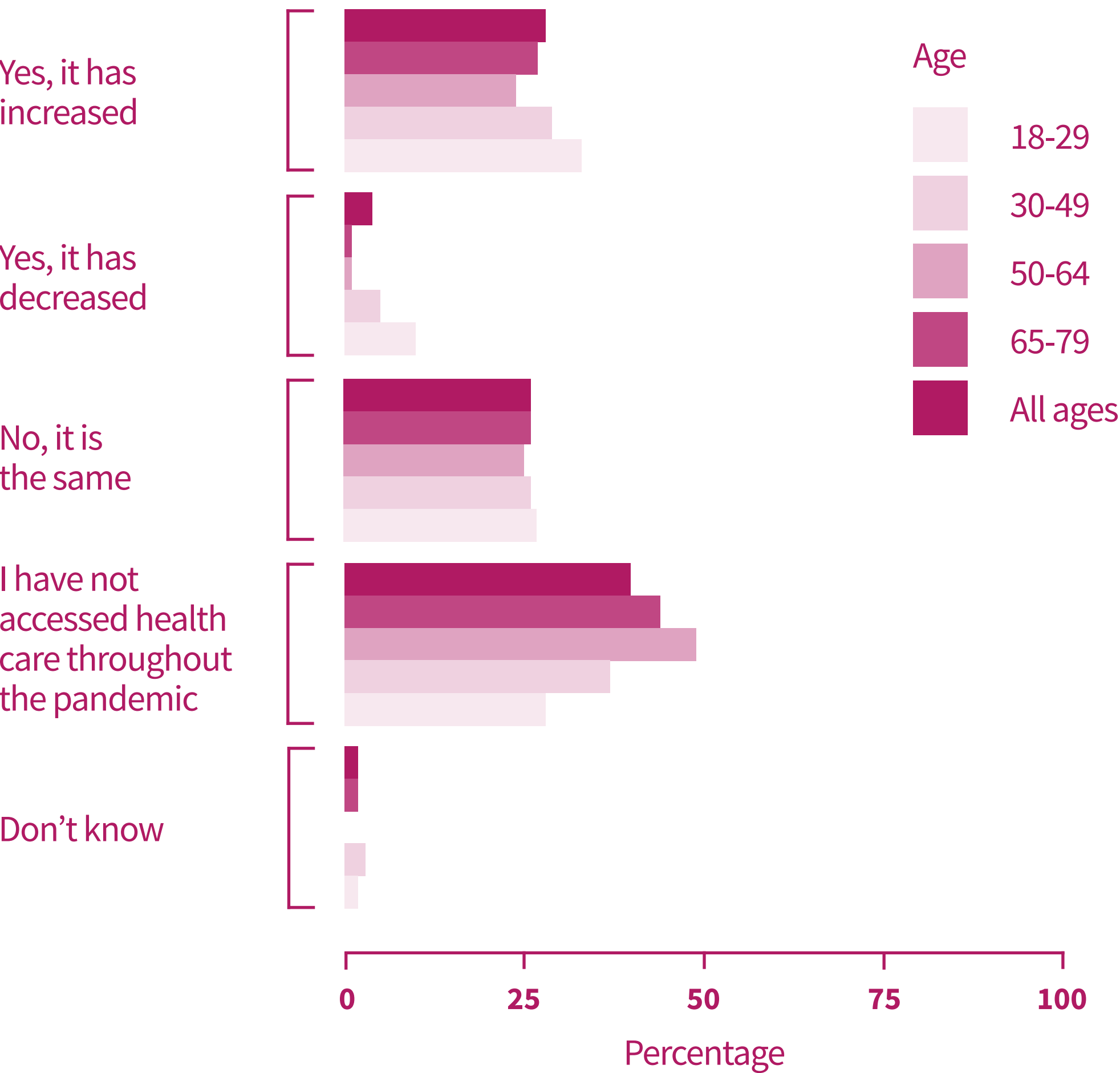
28% of respondents said their use of online consultations increased during the pandemic.



COVID-19 has changed the way that people interact with the NHS. It has been a clear, and unsurprising, driver of online consultations, but the change has not been uniform. The first UK lockdown saw people's contact with healthcare services move online, but among our survey respondents, those under 30 were most likely to say that they had accessed healthcare and one in three said that their use of online appointments had increased.

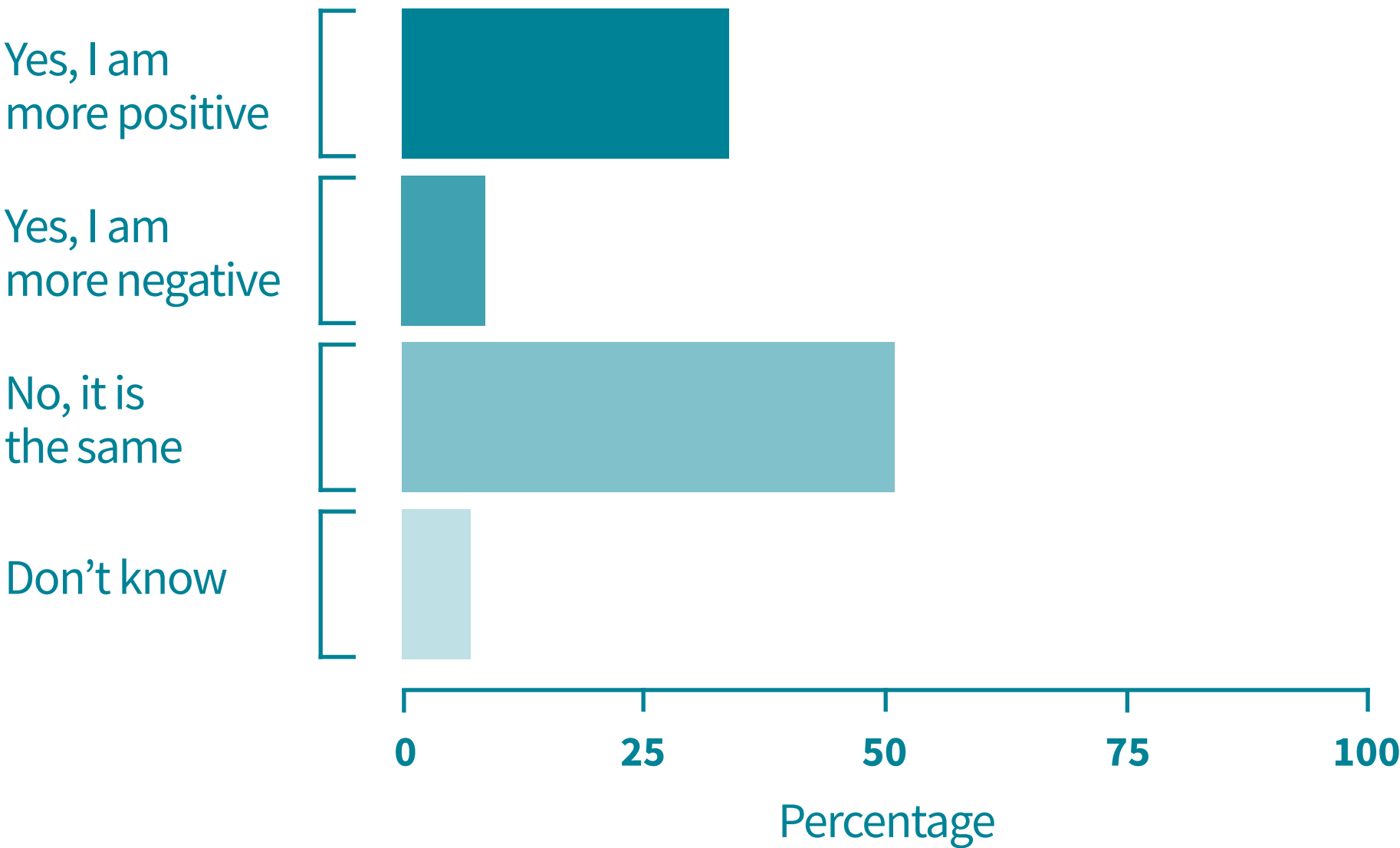
2. <https://digital.nhs.uk/data-and-information/publications/statistical/mi-acute-patient-level-activity-and-costing/2018-19/age-and-gende>
3. <https://digital.nhs.uk/data-and-information/publications/statistical/hospital-outpatient-activity/2019-20>
4. <https://digital.nhs.uk/data-and-information/publications/statistical/hospital-episode-statistics-for-admitted-patient-care-outpatient-andaccident-and-emergency-data/april-2020---august-2020>
5. <https://www.ifs.org.uk/publications/15160>
6. <https://ifs.org.uk/uploads/BN309-COVID-19-and-disruptions-to-the-health-and-social-care-of-older-people-in-England-1.pdf>
7. <https://ifs.org.uk/uploads/BN309-COVID-19-and-disruptions-to-the-health-and-social-care-of-older-people-in-England-1.pdf>
8. <https://www.hsj.co.uk/resource-centre/leadership/collaboration-can-bring-improvements-in-the-quality-and-productivity-of-care/7028657article>

**HAS YOUR USE OF ONLINE CONSULTATIONS
CHANGED DURING THE COVID-19 PANDEMIC?**



COVID-19 has also changed people’s attitudes towards the use of online consultations. 34% of all respondents (including those who had not had an online consultation) reported feeling more positive towards online consultations as a result of COVID-19, and furthermore half of those who did have an online consultation said the same. 14% of those who had an online consultation, however, felt more negative towards online consultations as a result of the pandemic.

**HAS YOUR ATTITUDE TOWARDS ONLINE CONSULTATIONS
CHANGED AS A RESULT OF THE COVID-19 PANDEMIC?**



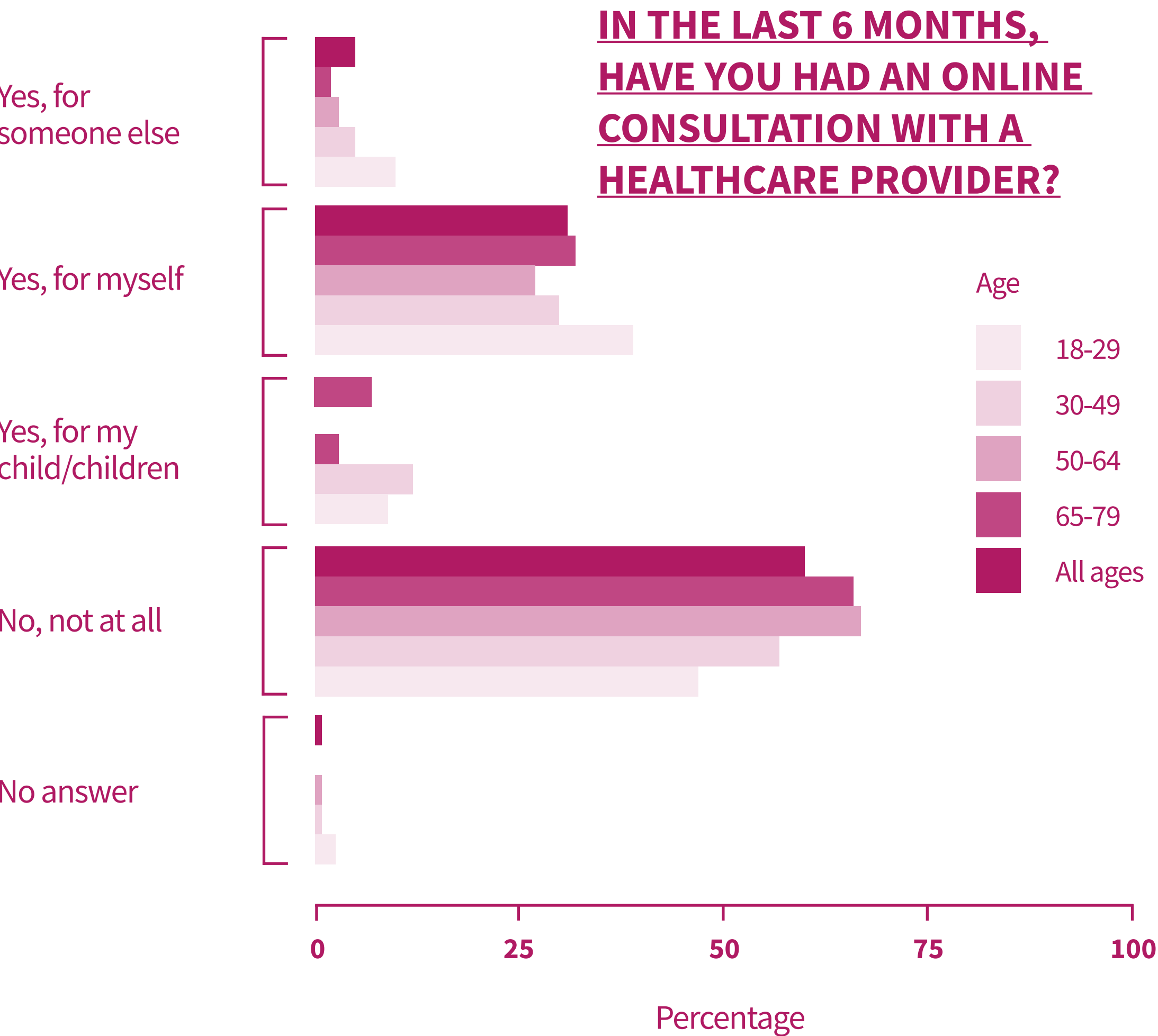
When looking at online appointments, a very different pattern emerges than the traditional interaction with the NHS, suggesting that there are groups not yet being reached through digital transformation.

18-29-year-olds were those most likely to have had an online consultation for themselves in the six months prior to the survey. Middle-aged and older adults used online consultations less often, with more 65-79-year-olds responding that they had not used online consultations at all in the six months prior compared to younger age groups, and only one in three of those over 50 had done so. Women over 65 were less likely than other groups to have had an online consultation and moreover, survey respondents aged 50-64-years-old were those that had accessed healthcare the least.

We were not alone in these findings; according to the Health

Foundation’s report, “Use of primary care during the COVID-19 pandemic”, people aged 18-49 adopted non-face-to-face consultations more than any other age group between March and June 2020.⁹

We can only speculate that there is an element of social responsibility among middle-aged adults that may have compelled them to not access healthcare to ‘protect the NHS’; while this may have relieved some pressure to the NHS in the short term, the long-term avoidable harms to patients are concerning, and we must mitigate a situation where people actively avoid seeking care.¹⁰ Conversely, in May 2020, a survey¹¹ showed that young people were less likely to follow lockdown rules, partly due to concerns over their impact on anxiety and depression, factors which might also drive them to use online consultations more to seek help, especially with their mental health.



REACHING MORE ADULTS

Online appointments free clinical time for appointments that need to be done face-to-face – typically for those with patients with more complex cases. Perhaps, then, the fact that the highest uptake was seen among younger people meant others were able to access more face-to-face time. However, if those who are sickest are best served by face-to-face appointments, there is still a population of adults who would benefit from online consultations and reaching them would free valuable clinical time for other urgent face-to-face appointments.

Yet according to our survey, people aged 50-65 had a low likelihood of accessing both healthcare and online consultations. Making sure we reach this population will be crucial in preventing their future health needs and pressures on the NHS and offering different user pathways will be critical to this.

User-friendly solutions

While the survey did not ask why people chose not to use online consultations, some of this behaviour may be due to not having access to technology they are comfortable with. Ofcom's Access and Inclusion Report from 2018 found that half of internet non-users cite not going online because of a lack of a perceived need or feeling 'it's not for people like them', and one in five say that going online is too complicated.¹²

Good design is vital to enable people to access online resources, and best practice ensures that designs are tested on users of all abilities and refined based on their feedback. Digital solutions can be implemented in addition to and alongside physical interaction, transforming patient pathways to ensure people receive the appropriate care when and how they need it. Another important element is enhanced training within the NHS so that healthcare providers are themselves fully comfortable with platforms, experience their benefits, and can help to guide users through the process.

Ofcom's 2020 Adults' Media Use and Attitudes report shows that there is a growing portion of adults that only use devices other than a computer to go online.¹³ Adults are also increasingly using their smartphones to complete forms and applications – 72% did so between 2019-2020 (pre-COVID-19); however, 65% reported that it is more difficult to do this on a phone than a computer.¹⁴ This is important to know when adopting platforms for online consultations that increasingly use forms as a means of triage and record collection; they must provide an easy user journey on both smartphones and computers.

9. <https://www.health.org.uk/news-and-comment/charts-and-infographics/use-of-primary-care-during-the-covid-19-pandemic>

10. <https://www.hsj.co.uk/resource-centre/leadership/collaboration-can-bring-improvements-in-the-quality-and-productivity-of-care/7028657.article>

11. <https://www.bbc.co.uk/news/health-52587368>

12. https://www.ofcom.org.uk/_data/assets/pdf_file/0018/132912/Access-and-Inclusion-report-2018.pdf



Familiarity and security

There are calls from groups like the Public Policy Institute to ensure that NHSX sets out a ‘minimum digital functionality’ to which all organisations are accountable, focussed on capability, security, and resilience of systems.¹⁵

They also hold that there is a need for greater investment in the NHS Apps Library, such that more apps are available here, and marketing efforts increase awareness of and trust in these apps as a point of entry into the healthcare system.¹⁶ Taking this a step further, it is important to consider that offering white-labelled apps will enhance trust, as people will be able to identify their regular provider rather than a third party with which they are unfamiliar. Some adults also tend to be less confident about managing access to their personal data online (those over 45 being less confident than those 16-44).¹⁷ In encouraging middle-aged and older adults to use online consultations it is critical that platforms are highly secure and that users are aware of this.

We know that there is some level of comfort among middle-aged and older adults in using online platforms to access different healthcare services. According to The Health Foundation’s “Who gets in?” report, which looks at the 2020 GP Patient Survey data, very few people were using general practices’ online services at the beginning of the pandemic (the time of analysis).¹⁸ However, when looking across a range of services offered (i.e. booking appointments, ordering repeat prescriptions, and accessing medical records), it was in fact people aged 55-74 who were *most* likely to have used one of those services (with ordering repeat prescriptions being the most commonly used service).¹⁹ We therefore cannot assume that we are starting from zero in encouraging these people to also use online consultations – rather we need to ensure that the available online consultations are easy-to-use, with a familiar provider, and offer a sense of security to the end user.

13. https://www.ofcom.org.uk/__data/assets/pdf_file/0031/196375/adults-media-use-and-attitudes-2020-report.pdf

14. https://www.ofcom.org.uk/__data/assets/pdf_file/0031/196375/adults-media-use-and-attitudes-2020-report.pdf

15. <https://publicpolicyprojects.com/blog/publications/accelerating-digital-healthcare/>

16. <https://publicpolicyprojects.com/blog/publications/accelerating-digital-healthcare/>

17. https://www.ofcom.org.uk/__data/assets/pdf_file/0031/196375/adults-media-use-and-attitudes-2020-report.pdf

18. https://www.health.org.uk/news-and-comment/charts-and-infographics/who-gets-in?utm_campaign=11940053_GP%20patient%20survey%20analysis%20%20November%202020%20%20WARM&utm_medium=email&utm_source=The%20Health%20Foundation&dm_i=4Y2,73X05,SYQKIL,SQNDH,1

19. https://www.health.org.uk/news-and-comment/charts-and-infographics/who-gets-in?utm_campaign=11940053_GP%20patient%20survey%20analysis%20%20November%202020%20%20WARM&utm_medium=email&utm_source=The%20Health%20Foundation&dm_i=4Y2,73X05,SYQKIL,SQNDH,1



We must keep some of the great stuff that has been achieved - the remote triage and the remote care where it is appropriate is exactly right.”

“I do miss my patients and I do miss the ability to have that conversation face-to-face, but if we can get the balance right, we will have some capacity to work a bit more deeply with digitally excluded communities and engage patients who wouldn’t have otherwise been.”

“What we’ve been able to do now is offer a way of working that offers that flexibility and that choice to patients and staff.”

- Dr Nikki Kanani,

NHS England’s medical director of primary care

WHY DO PEOPLE WANT TO USE ONLINE CONSULTATIONS?

Digital transformation is meant to enable people to have greater control over their health and care. There are clear perceived benefits to online consultations compared to traditional face-to-face interactions with a healthcare professional, especially in light of the pandemic.

44% of people surveyed said that reducing the risk of infection is a benefit of online consultations. While pandemic-associated risk was likely to be front of mind, there are also long-term advantages over face-to-face consultations; there is less actual risk of infection, and also an increase in patients’ confidence and propensity to seek healthcare when they need it.

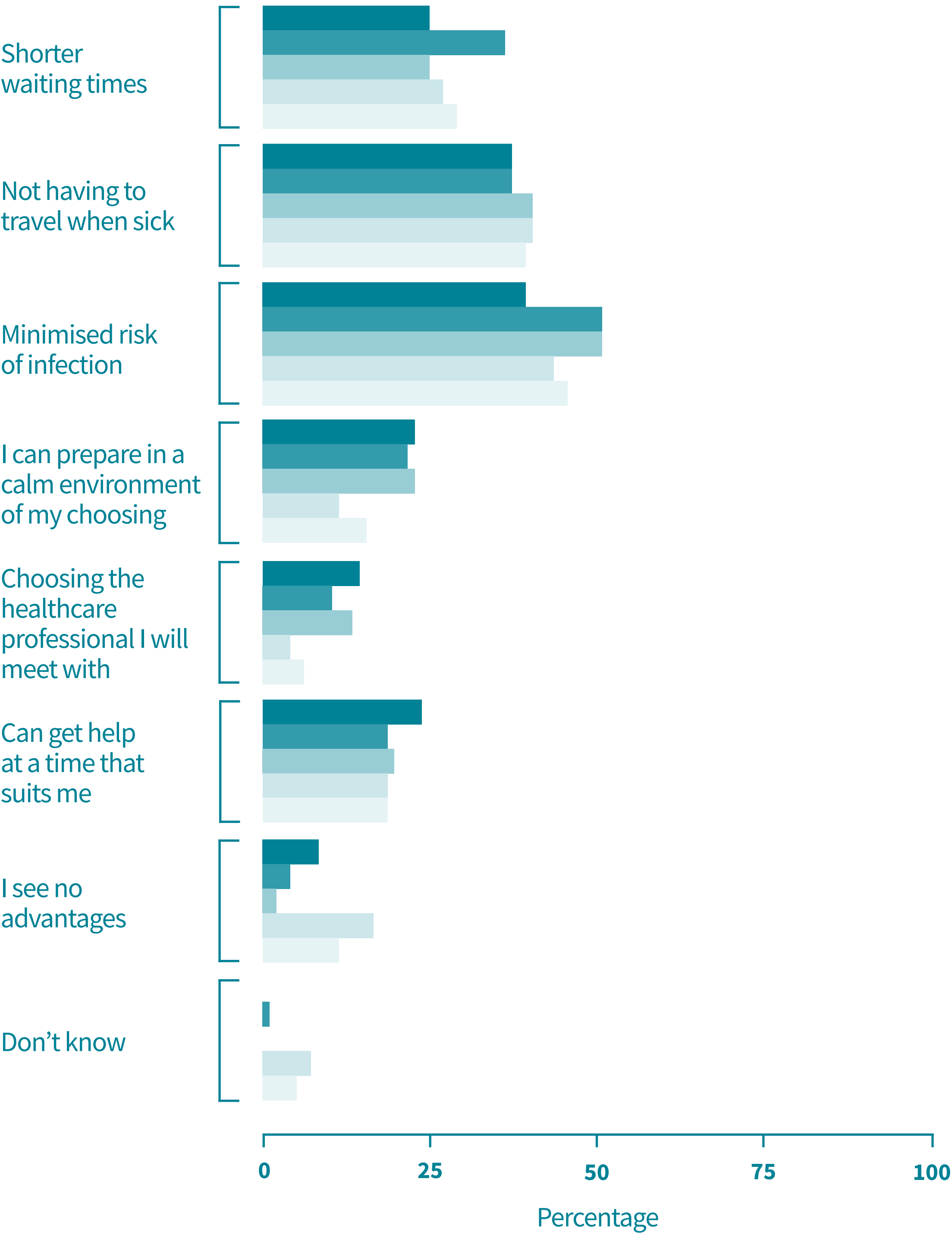
Another advantage, selected by over a third of respondents (38%), was a reduced need for travel. This is significant both during the pandemic, and more broadly given that travel can be a burden depending on where people live and where health services are located.

Previous research by Visiba²⁰ found that moving 30% of outpatient appointments online could save close to one million days off work each year. This would have a significant impact both on the economy and on people’s willingness to attend their outpatient appointments.²¹ 18% of survey respondents indicated that increased flexibility is also a benefit to online appointments.

IN YOUR OPINION, WHAT ARE THE MAIN ADVANTAGES OF ONLINE CONSULTATIONS COMPARED TO PHYSICAL CONSULTATIONS?

Reported online consultation use

- All
- No, not at all
- Yes, for my child/children
- Yes, for myself
- Yes, for someone else



20. <https://www.telegraph.co.uk/news/2020/08/08/moving-hospital-appointments-online-would-save-million-days/>
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Interestingly, while only a small proportion of all respondents said they see no advantage at all (11%) the same sentiment was slightly higher among those who had not had an online consultation (16%), suggesting that once people experience online consultations, they are more convinced of the advantages. When looking at people's opinions of online consultations and their impact on access to healthcare, it is obvious that having had an online consultation significantly increases positive perceptions.

“COVID-19 has exposed deep seated and continuing inequalities in access to digital services. For many people, the shift from face-to-face to remote consultations has not been to much heralded video consultations but simply to telephone. Barriers to using online consultations include lack of digital skills, broadband access, and perceived value. It's important that there are systems in place to address and overcome those barriers. The NHS does a lot of fantastic work with intermediaries to support people to manage their health online; in light of COVID-19, support for the digital skills required to use online consultations will be a key element in reaching more people.”

- *Bob Gann*
Digital inclusion specialist



Better tech means better healthcare... we need to double down on the huge advances we've made in technology within NHS and social care.”

- *Matt Hancock*
Secretary of State for Health and Social Care

Of those who attended an online consultation, 66% said it improves access to healthcare and 70% said it reduces waiting times. This is in stark contrast to those who had not had an online consultation, at 38% and 36% respectively.

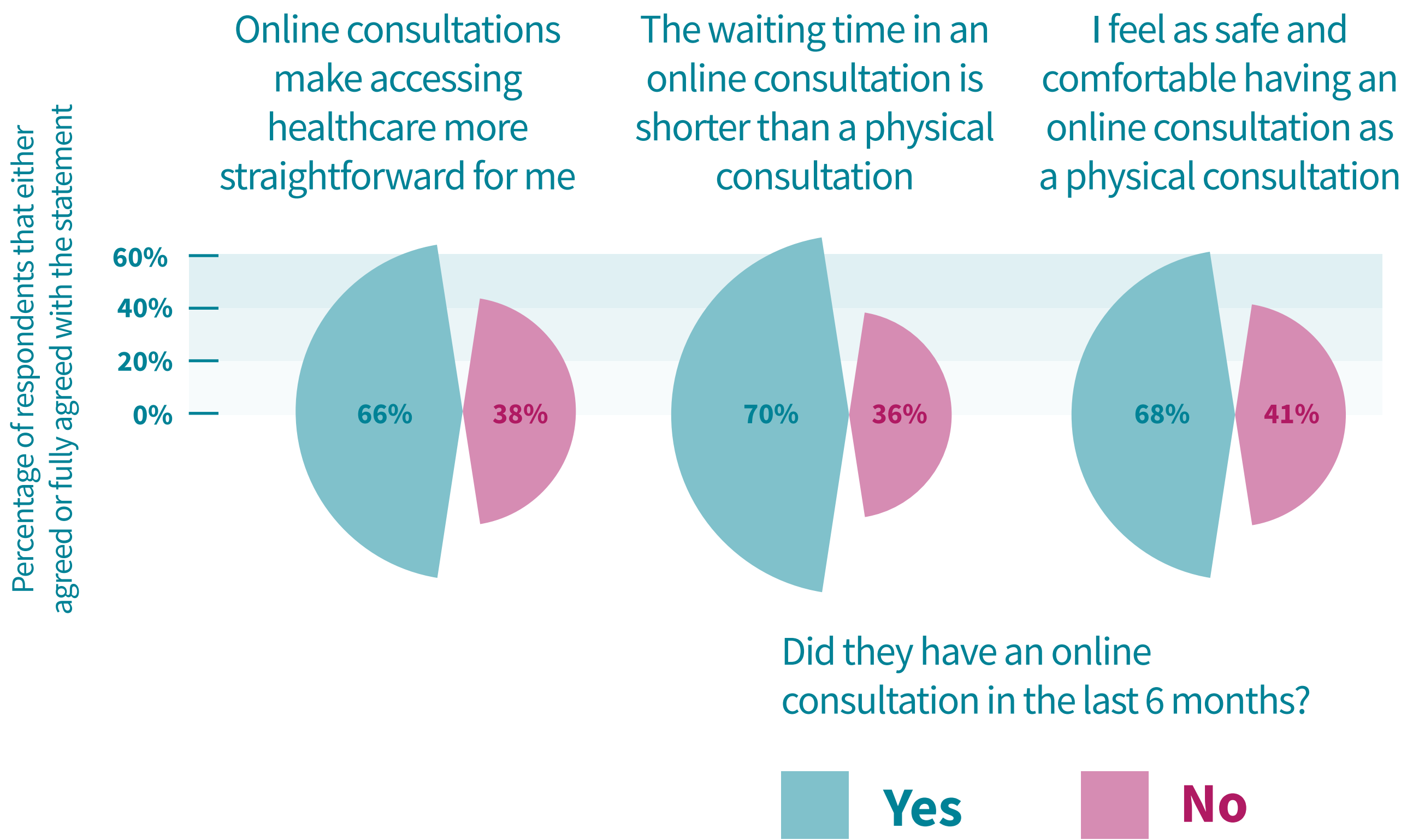
Over two thirds (68%) of those who attended an online consultation said they feel as safe and comfortable with having one online as a physical one, compared with only 41% of those who hadn't.

Similarly, 61% of those who had attended an online consultation in the last six months felt equally satisfied with the quality of care they would receive online compared to face-to-face, versus only 25% of those who hadn't.

Notably, 63% of respondents said they felt more comfortable with consultations provided directly through their regular healthcare provider. This highlights the need for the NHS to engage with white-label solutions that can provide healthcare from regular providers through online solutions, given that many of the current available solutions are third party-branded.

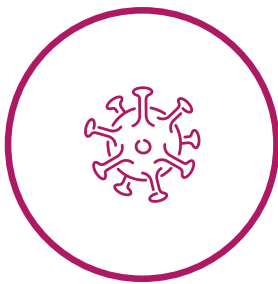


**WHAT DO PEOPLE THINK
ABOUT ONLINE CONSULTATIONS?**



The COVID-19 pandemic has highlighted the importance of a healthy population, which can greatly improve outcomes of disease. Improving access to healthcare and reducing waiting times is likely to have a positive effect on the nation’s overall health, and online consultations could play a major role in this. Knowing that people tend to feel more positive toward online consultations after experiencing them, we need to look to actions that will encourage more adults to take part.

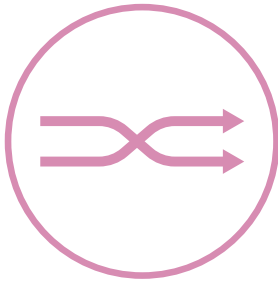
**Perceived benefits of
online appointments**



**Reduced risk
of infection**



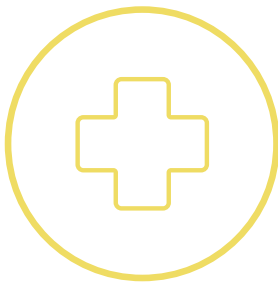
**Reduced
need for
travel**



**Increased
flexibility**



**Reduced
wait times**



**Improved
access to
healthcare**

THE FUTURE OF ONLINE CONSULTATIONS

As online consultations become standard practice, people are beginning to see the benefits. While the onset of the pandemic necessitated the rapid adoption of solutions, as we look to the future it will be critical to evaluate what works, what doesn't, and what will facilitate the greatest long-term impacts.

Around one in three respondents felt that services would be improved by offering more appointment timeslots (29%) and being able to book appointments directly with a specialist (28%). This would not only help patients get their treatment faster, but it would also relieve some pressure on GPs, who currently process referrals. About one in four respondents who had an online consultation in the last six months said that they would like to see more providers offering online consultations. All this highlights the fact that patients are keen to take control of their own health by choosing from appointments offered at different times, speaking directly to a specialist and having more providers offer online consultations. It also highlights the importance of implementing solutions that can support digitisation of care across the entire care pathway rather than just at discrete points.

While the pandemic has presented the NHS with a myriad of challenges, it has also created

an opportunity to rethink our approach to healthcare. Looking beyond the pandemic, during which online consultations have become a necessity to minimise infection, there are definite long-term logistical and economic benefits in shifting to online appointments.

At this point, some adults are missing out on care. Online consultations have the potential to fill a significant gap in their access; the solution lies in utilising platforms that are appealing, accessible and can have real impact across the entire patient pathway. Knowing that people feel more positive about online consultations after having experienced them, offering an inviting solution to them and having a workforce of healthcare providers who are also on board and able to offer support and encouragement is critical. We know there are benefits, we know there are people who could be using these appointments but aren't, and we now need to fill that gap by implementing platforms that offer the complete package.

If the NHS is to experience full digital transformation, it cannot only apply to younger people. With the health service looking to reset for what the future holds, online consultations are just one part of a larger, system-wide push for integration and innovation.

The challenge lies in ensuring that no one is left behind and building on what is working well to create a fully integrated system of digital care provision. Working in partnership with platform providers who can demonstrate a track record of success in patient satisfaction, white labelling, security, end-user engagement, and reliability across the entire patient pathway, is key to overcoming this challenge.



“It is important that we are able to fully understand and analyse what has happened over the course of the past year so that our health services can address the issue of digital health uptake.

Having a clearer idea of patient demand for online healthcare consultations, and more generally for digital health services, along with an accurate picture of what’s available to patients, means we can start to develop a true system-wide digital transformation.”

- *Graham Kendall*
Director of the Digital
Healthcare Council

Key takeaways

- Between March and August 2020, people increasingly accessed care online. This increase was seen especially among younger people
- People turn to online appointments because they limit the risk of infection. They also increase access to care and offer greater flexibility by reducing travel and wait times
- Some adults are not accessing online consultations or their benefits. When selecting digital solutions for implementation, it is critical that online platforms are chosen based on their ability to enhance people’s trust of and experience in using an online consultation
- To increase people’s use of online appointments, platforms need to be user-friendly, secure, and familiar. There must be enhanced training and support for change management within the NHS so that healthcare providers also reap the benefits and support user experience
- People’s positive perceptions of online appointments are generally influenced by whether they have had an online appointment, so it is critical they are offered and encouraged to use consultations that will be appealing to them
- Visiba’s platform offers a solution to counter the barriers people face in uptake, including user experience and centricity, security, and provider familiarity