



Business

How technology is
supporting the health
sector's bounce-back
from Covid-19



Section 1

Closing the digital gap to create better outcomes for patients

Technology is nothing new for the health sector.

But previously patients were reluctant – even nervous – to use it. That coupled with budgetary restraints and red tape hindering agility made transformation anything but simple.

During the pandemic, however, financial restrictions and red tape loosened so NHS organisations could invest in digital services to mobilise and meet exceptional demand, moving services online and maximising efficiency where possible.

We partnered with the Centre for Economics and Business Research (Cebr) to understand the scale of these digital changes and their impact across the UK.

Our research reveals that the pandemic accelerated digital progress in the health sector by more than four years.

This acceleration led to the following increases during a time when some might have expected these metrics to fall:

7.3%

higher patient satisfaction

6.7%

higher employee productivity

5.1%

higher employee satisfaction

Section 1

Closing the digital gap to create better outcomes for patients

Yet there is still monumental pressure on the NHS. Leaders have warned that the government's £5.4 billion in funding over the next six months could quickly run out in the face of record waiting lists. The opportunity to meet the targets of the NHS's long-term plan is in danger of not being realised.

Health organisations must now lean on digital technology to support them through a difficult period of transition for the sector. Continued investment in digital technology could bring a £6.4 billion uplift to GDP by 2025.

An uplift that could rise to £53 billion by 2040.

But what do these numbers really mean for you and your organisation?

We've created this short health sector-focused report to help you answer that question.

[Read on to find out more.](#)

“Good connectivity is vital for healthcare practitioners, supporting them with faster, more reliable access to the information and services they need, when they need it.”

Patrick Clark, HSCN Programme Director at NHS Digital



Section 2

Key findings

The pandemic accelerated digital progress in the UK's health sector by more than four years. This speed of adoption has led to a better-connected sector and one which is more confident in the positive impacts of digital technology than ever before.



Where is the health sector investing?

- 37%** made changes in digital delivery of services
- 32%** made changes in the use of big data
- 25%** made changes in hybrid working

A better experience for patients and staff

- 7.3%** increase in patient satisfaction
- 6.7%** increase in employee productivity
- 5.1%** increase in employee satisfaction

An optimistic outlook for the future of digital in the health sector

- 17%** expected spend increase on technology/digital/IT at the peak of the pandemic between 2020-21 vs. 2019
- 75%** of respondents said the impact of changes in the way health sector organisations work are positive

The opportunity to drive economic growth in the next few years

- £6.4 billion** expected economic uplift through 2021-2025 as a result of digital adoption
- £53 billion** expected economic uplift by 2040 as a result of digital adoption

Section 3

How and why has the health sector adopted digital technology?

“I do think there was a lot of ability to break down barriers that were previously there and challenge people about their models of working. We’ve shown that remote consultations and working from home can work.”

Jeremy Drake, consultant anaesthetist and chief clinical information officer at Buckinghamshire Healthcare NHS Trust

Before March 2020, hybrid working wasn’t a viable option for most of the sector due to complex implementation and archaic IT infrastructure.

But the pandemic made it a necessity, prompting a widespread shift to hybrid working.

Decision-makers invested in collaboration tools, cloud services, IT equipment and cybersecurity to create an environment in which their employees can thrive.

For many practitioners, remote delivery of care allowed them to continue vital services like GP appointments or mental health support accessibly and safely.

According to our research, employers are now predicting that employees will be working remotely 2.7 days a week on average after the pandemic – the highest out of any sector.

And while the clinical environment will always be the primary setting for health care, hybrid working offers additional options previously not available or used to their full potential. This unlocks both organisational efficiencies and additional services and benefits for patients.

Percentage increase in spending on hybrid working technologies in the health sector:



14.7%

Collaboration tools



14.3%

IT equipment



13.3%

Cloud services



7.2%

Cybersecurity


As a result of this investment to support hybrid working patient satisfaction, employee productivity and satisfaction have all risen – by 7.3%, 6.7% and 5.1% respectively.

Some employees also have more time on their hands through increased productivity, fewer distractions at home and time saved on commutes. Across the UK our research found employees averaged around two additional hours of ‘me-time’ through hybrid working.

Decision-makers have recognised these benefits and are responding by continuing to invest in digital. They now expect to spend 17% more on technology/digital/IT in as a direct result of Covid in 2020/21 compared to pre-pandemic levels.

And the future looks bright in terms of healthcare staff receiving the flexibility they need from their employers.


Top reasons for making change in hybrid working policies permanent:



Meeting employees' demands because of an improved work/life balance seen from hybrid working



Improved service quality and experience for patients



Meeting employees' demands because of increased productivity



Hybrid working is only as good as the systems in place that enable it, of course. Employees need to feel supported and that their health and wellbeing are being looked after, with plenty of touchpoints and contact with other team members.

Continued commitment to hybrid working will further improve the employee experience and heighten the benefits we've already seen across patient satisfaction and productivity, making for a more resilient sector.



East Suffolk
and North
Essex NHS
Foundation
Trust

East Suffolk and North Essex NHS Foundation Trust (ESNEFT) has transformed the way their staff interact and collaborate among each other and with patients. ESNEFT's mantra is a simple one and applies to everything the organisation does – 'time matters'.

Mike Meers, Director of IT at ESNEFT, decided to roll out collaboration tools like Microsoft 365 to help staff collaborate on documents quickly and in real time. ESNEFT also rolled out surface devices to facilitate hybrid working from anywhere, ensuring everyone across the organisation has a voice regardless of location.

This investment in hybrid working technology allowed ESNEFT's 10,000 staff to stay connected during the pandemic and beyond. And Ian Ling, ESNEFT's Head of IT, says the shift to hybrid working is improving outcomes for patients.

“I'm confident that the work we've done in Office 365 has had impact on patients. For me, Teams has been a game changer, in the way that it allows staff to communicate with each other and collaborate from their mobile devices and from their laptops in group chats.”

Mike Meers, Director of IT at ESNEFT

The Trust is now using Teams for one-to-one meetings, group chats, project management and several other activities – allowing them to save time on journeys and see more patients thanks to hybrid working technologies enabling remote consultations.



Delivering care wherever patients need it

“I think we’ve seen much more acceptance that, actually, it’s okay to be seen remotely; it’s okay to have remote monitoring. I think, largely, patients have been really accepting of this virtual world and actually found it to be of great benefit.”

Graham Walsh, chief clinical information officer at Calderdale and Huddersfield NHS Foundation Trust

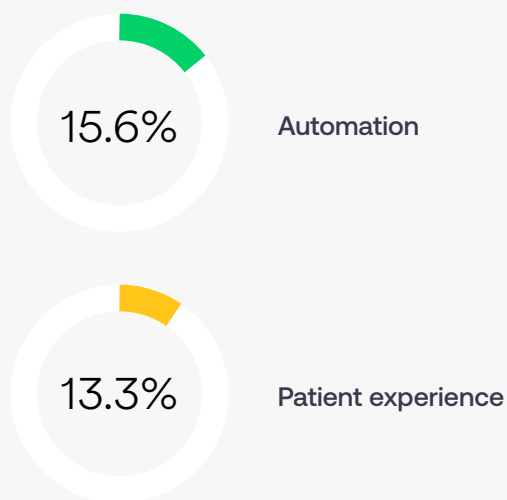
The digital delivery of services during Covid-19 was crucial in meeting the very real public need for online consultations, allowing people to see doctors or nurses when they needed them most.

Video consultation technology already existed before the pandemic, of course. But lockdown accelerated the need for digital services and opened people’s eyes to their value.

Enhancing patient experiences, monitoring health remotely, fulfilling prescriptions online – all of these were thrust into the limelight as the UK shut down and our digital technology became central to our ability to exist.

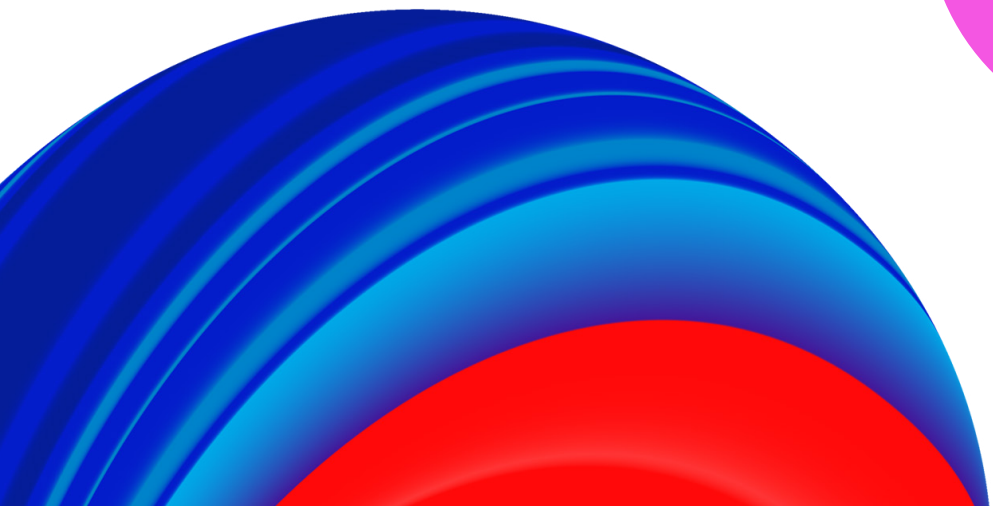
By automating certain services, decision-makers ensured patients could easily access what they need, while healthcare workers could focus on prioritising in-person treatment where it was needed.

Percentage increase in spending on digital delivery of services tools in the health sector:



Our research also found that employee productivity across the health sector has risen by 6.7% – a statistic likely linked to the rise of hybrid working combined with the digital delivery of services creating a working environment moulded for the people who keep our health services running.

The health sector's investment in digital change and hybrid working is paying off – patient satisfaction has risen by 7.3%





Richmond
Wellbeing
Service

At the Richmond Wellbeing Service, the digital delivery of healthcare has become the new everyday. Lead Clinician, Dr. Ben Wright, says that their services have gone entirely digital. Patients are seen online or, for those without digital assets, in digital pods at repurposed clinical spaces.

“With virtual consultations, the personal cost of having an appointment is so much less. So, more people are able to have treatment and to benefit from it.”

Dr. Wright, 2020

Dr. Wright predicts that 70% of mental health consultations will remain virtual in the wake of the pandemic – with pods becoming equipped with ultrasound probes and high-quality microphones so patients can fully self-examine.

Now, Dr. Wright says that the strategic will and concerted delivery of digital transformation must catch up with organisational engagement.

“There is so much value we can extract from digital, if we go about it in a systematic way. The challenge is to go from good to great.”

Dr. Wright is one of many clinicians who have seen first-hand the benefits of delivering services digitally. Now many are looking to make the changes permanent and lock in the benefits that they’ve experienced from Covid-driven digital adoption.

Face-to-face appointments aren’t going away. By combining virtual consultations with in-person trips to the GP, however, health services are able to prioritise who can be seen remotely against those who need to come in for their appointment – saving them both time and money.

Top reasons for making the change in digital delivery of services permanent:

Benefits to organisational decision-making

Improved service quality and experience e.g. digitalising health services, online prescriptions etc.

Real-time data intelligence and insight, to continue improving the provision of health services



“Our virtual A&E provides an all-important lifeline to anyone worried about losing their sight, providing rapid access to our team of specialists without the need to travel. Across the NHS, trusts have been innovating at pace thanks to having the right technology at the right time.”

David Probert, Chief Executive, Moorfields Eye Hospital

Smarter use of data creating a better connected, more unified health sector

“By adopting innovative digital strategies, we provide clients with a way of centralising every aspect of care provision, from meeting nutrition and hydration needs to making sure staff are in the right place at the right time with the right kit.”

Tony Thiru, Founder of care home consultancy, Fulcrum Care

In many ways, the success of digital transformation depends on the effective use of data.

Access to better data bolsters organisational planning and supports internal operations. The secure movement of data enables collaboration at scale.

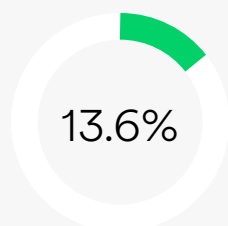
In short, it underpins both hybrid working and the digital delivery of services.

Cloud-based infrastructure allows organisations to share vital patient records and other data among each other seamlessly and securely, in a way that creates the best health outcomes for patients.

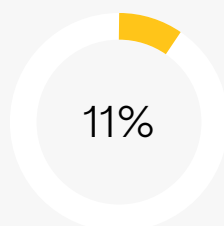
And these connected systems help leaders spot emerging trends across demographics, regions and services, providing greater visibility that may ensure health issues are spotted earlier than in previous time. All of which serves to reduce pressure on NHS services in the long term (not to mention improve patient diagnosis).

That’s why leaders in the health sector have been investing in technology that allows them to gather richer data and insights, enable machine learning and investment in online marketing, including training staff in interpreting data and using it to promote the use of online NHS services.

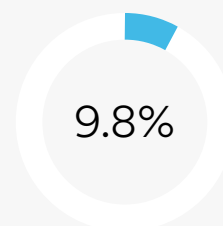
Percentage increase in spending on data and analytics across the health sector:



Analytics and insight



Machine learning



Online marketing

Section 3

How and why has the health sector adopted digital technology?

The rise to prominence of data within our health services has led to significant improvements in the quality of service that they can provide, as reflected by the 7.3% rise in patient satisfaction across the sector.

And interoperability sits at the heart of this change. By sharing data across health organisations and to other public sector services, NHS organisations can ensure that patients are being diagnosed faster and receiving the treatment they need sooner.

NHS Digital has led from the front during the pandemic when it comes to the better use of data to create more unified services.

NHS Digital completed the biggest ever public-sector data-network migration during Covid-19. Today, the Health and Social Care Network (HSCN) connects 12,000 sites belonging to 950 NHS, social care, private-sector and local authority organisations.

These organisations now benefit from faster connections that are essential to delivering health and care services in the digital age. They can source network connectivity from multiple suppliers and collaborate with other health and social care networks.

Dan Parry, HSCN Lead Migration Programme Manager at NHS Digital, emphasised the benefit of unified data in proper patient care.

“The more information our clinicians can share when they are discussing complex patients gives them better ability to provide better patient care.”

Dan Parry, HSCN Lead Migration Programme Manager at NHS Digital



This investment in data has saved the NHS around £75 million a year

75% of respondents said the impact of changes in the way organisations work are positive

Top reasons for making changes in data and analytics permanent:



Organisation decision-making

Improved service quality and experience for patients e.g. digitalising services, trusts, GPs, care homes working together to enhance patient care

Real-time data intelligence and insights, to keep improving the provision of healthcare and to support employees in how they work

With the emergence of data as a unifying force comes security considerations.

The health sector is the most targeted industry by cyber criminals. The National Cyber Security Centre (NCSC) looked at NHS threat data and found 51,000 indicators of compromise by scanning NHS IP addresses.

Organisations now need to look at how they can avoid these cyber threats through basic cyber hygiene best practices such as anti-malware software, upgrading software on a regular basis and creating straightforward and intuitive security technology.

“What we found is having that remote monitoring, knowing how your patient’s exercising, knowing that they’re hitting their goals – that, for me as a clinician, was great. I could be confident that we’re progressing. Physios could pick and choose which patients they needed to see. So the right care was going to the right patient.”

Graham Walsh, CCIO, Calderdale
and Huddersfield NHS Trust



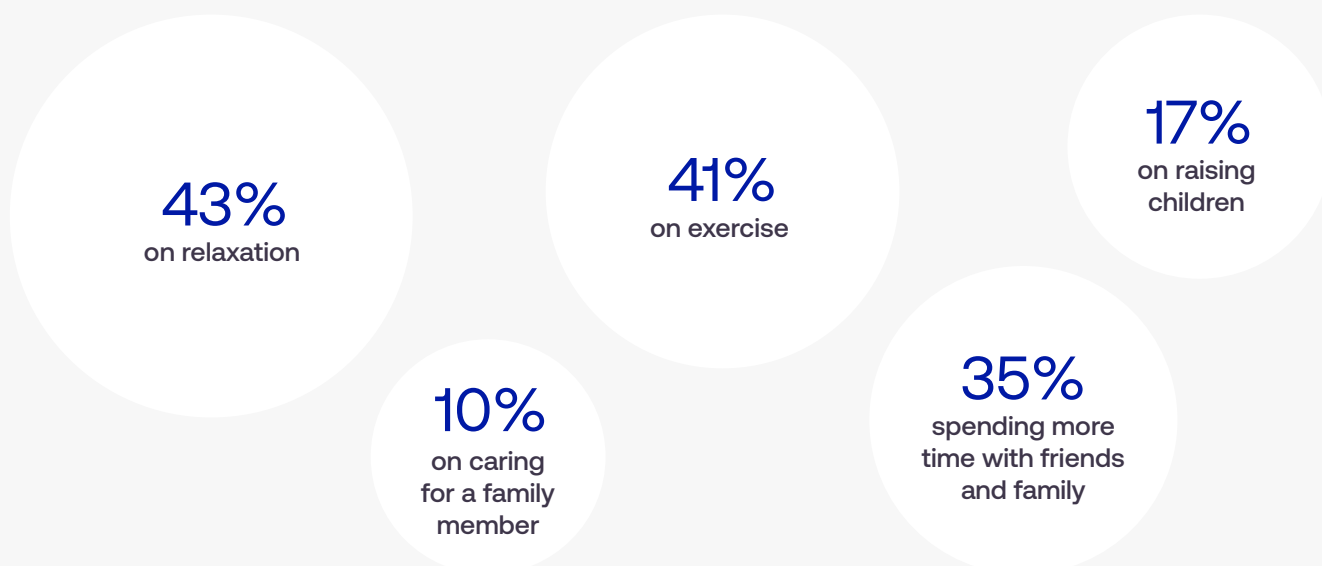
Hybrid working is creating a healthier nation and could save the NHS billions

The health and wellbeing benefits of hybrid working have been felt across the UK in all sectors. People have more time in the day to use as they see fit.

Our research found that workers across all sectors save an average of two hours per day when working remotely.

We wanted to know how people were spending all of this extra time. As it turns out, many have chosen to spend it exercising, volunteering and reflecting.

How respondents said they would spend their additional hours in the day:



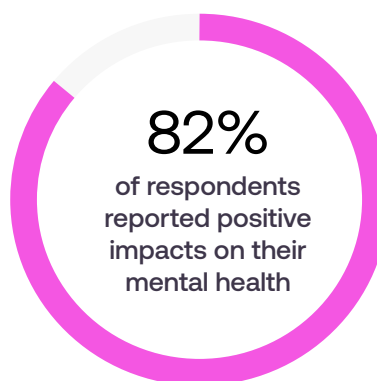
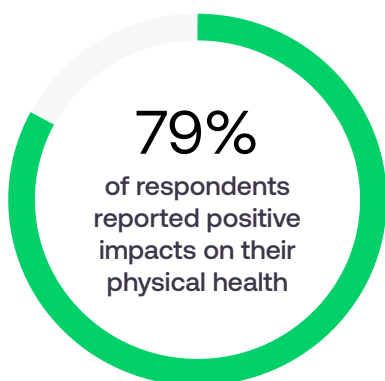
And a nation with improved work/life balance and more time to exercise and relax is a nation with better mental health. Of those who reported a change, 82% of respondents noted positive impacts on their mental health as a result of hybrid working.

Our research estimates that hybrid working could reduce the UK's level of inactivity by 84 million hours. A healthier nation means a reduction in heart disease, certain types of cancer and diabetes.

But positive outcomes of hybrid working are seen in physical as well as mental health.

How Covid-driven digital transformation has affected the nation's health

Of those who reported a difference in their health post-Covid:



The health outcomes of these statistics could have huge implications for the NHS. Combined with the use of big data to help predict emerging health trends, hybrid working has the potential to relieve pressure on our health services and create cost savings at the same time.

The population is also using its spare time to volunteer, leading to a society in which people are better looked after and lead more fulfilled lives around their world of work.

The potential savings for the NHS from hybrid working

Additional volunteering hours could save the NHS up to

£3.1 billion

a year

An estimated

211 million

hours of care could be unlocked by remote working

A more active population could lead to the NHS saving an estimated

£1 billion

a year

While these statistics are from our wider research, a healthier population is beneficial to everyone, regardless of the sector they work in.

Section 4

How health sector organisations can continue to benefit from digital change

The challenges of the pandemic have been more than met by decision-makers and employees in the health sector. Now comes a moment to solidify the progress they've made and continue it.

Decision-makers have an opportunity to use digital change to help combat some of the longstanding pre-Covid obstacles that are already creeping back in as the red tape returns.

Health is a sector that will always be under pressure to do more with less. Future investments will be monitored carefully and budgets always run the risk of being cut.

Technology will form a crucial part of creating cost-savings and efficiencies within our health services.

The sector has come so far on its transformation journey already. More satisfied patients, happier and more productive employees, a sense of confidence in digital technology among leaders – the benefits span beyond the workplace and into our society and economy.

The research explored in this report proves that digital adoption has created a healthier, happier nation with more time on its hands to look after others.

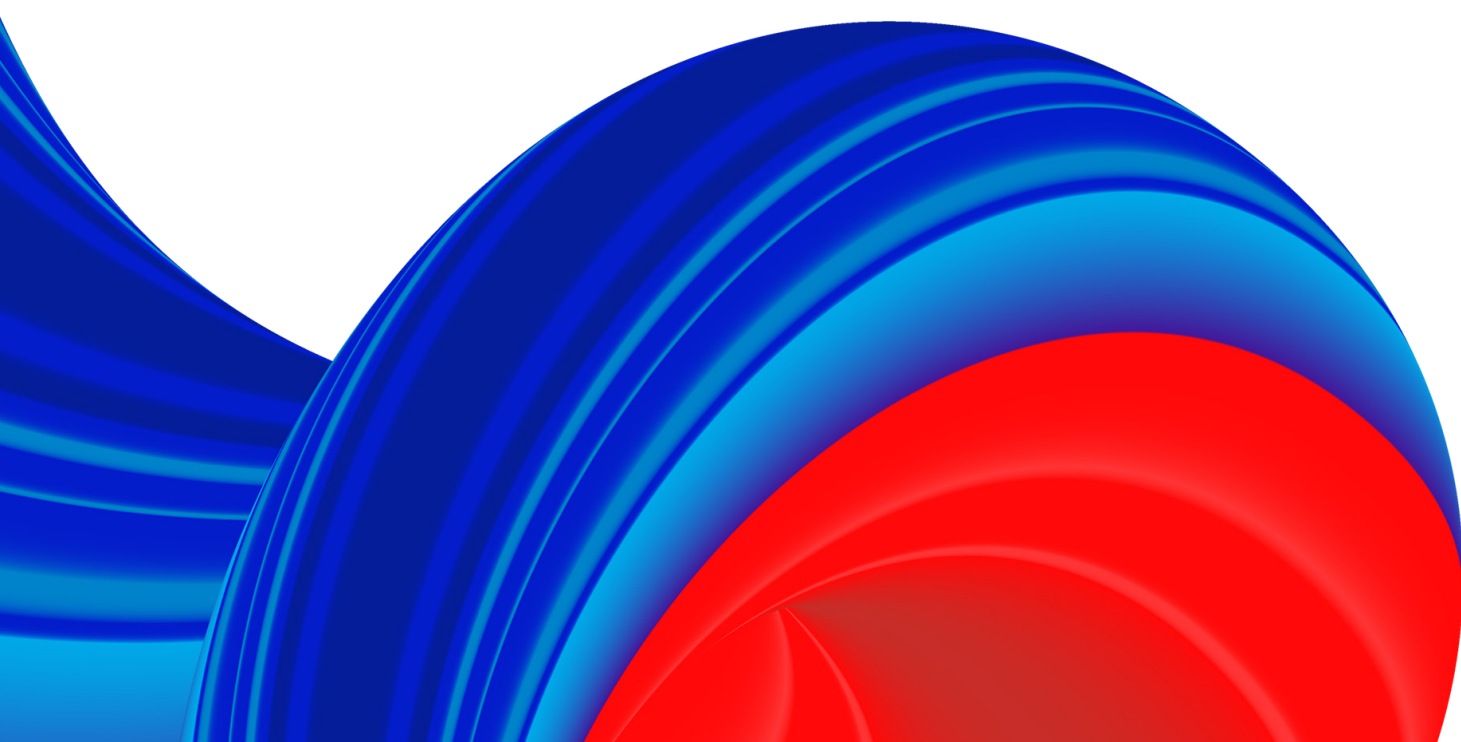
But the transformation doesn't end here. Systems need to become more robust to protect precious patient data in the future. And IT issues still prevail.

As we look to the next couple of years, the opportunity is clear. Leaders must continue the excellent progress made and seize a new era of benefits that have been brought about by hybrid working, digital delivery of services and better use of data.

There can be no going back to the old ways of working.

Every organisation is different, of course. But to facilitate progress and change in the health sector there are some essentials that every organisation must put in place:

- Investment in core infrastructure and systems to support applications for a flexible workforce, and improve delivery of digital-first services
- Continued investment in collaboration technologies to empower your staff to overcome your new everyday challenges such as virtual consultations





Business

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