



Digital Health across the Nordics:

Market Report 2021

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n!p

Rising Demand for Digital Health

With one in four Nordic citizens 65 years or older by 2040, and a growing proportion of people with one or more chronic diseases¹, digital health is seen as a vital component for a sustainable health system.

Delivering a future of a more patient-centred and sustainable healthcare service, digital health enables care that is personalised, convenient, engaging and available 24/7. Accessed by the tap of a button, digital health offers new ways for people to access support before, during and after traditional care.

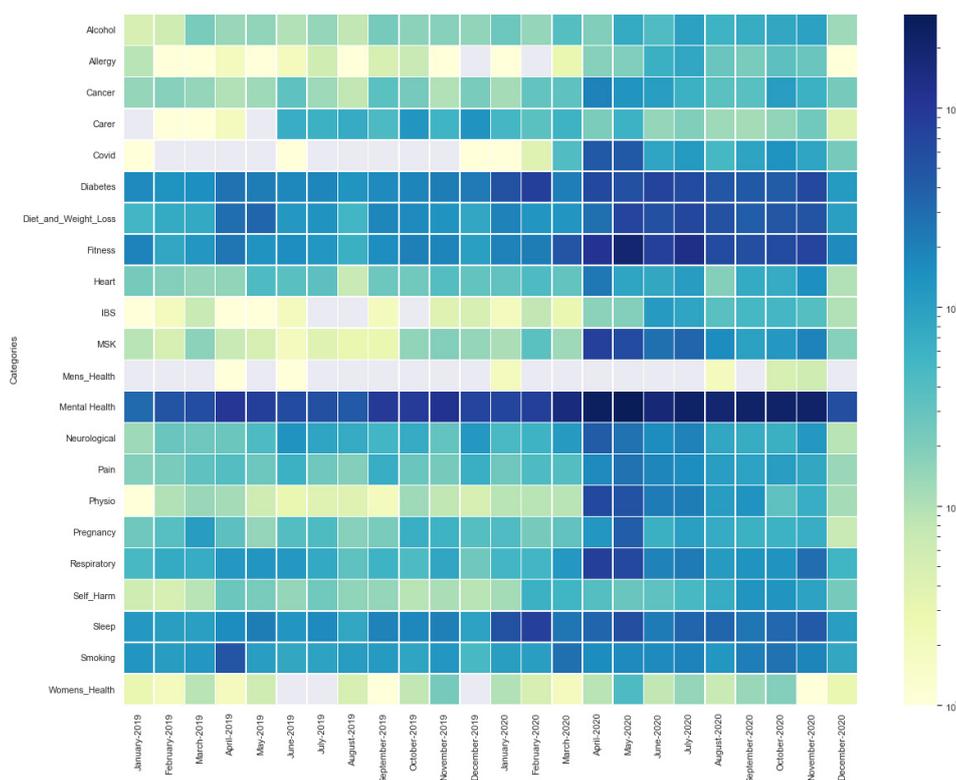
This appeal has led to increased adoption of digital health², and there are now 5 million health apps downloaded every day across the world.

Not just seen as a fitness tool, there is the appetite to use digital health to better manage long term health conditions prevalent across the Nordics today. For example, since 2014, searches for apps relating to mental health have increased more than five-fold, by 566%.³

Since the arrival of COVID-19, and the demands for social distancing, digital health adoption has accelerated further. During the pandemic 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.

The below table shows the search trends in ORCHA digital health libraries, used by healthcare services serving a population of 20 million across the UK, Netherlands and New Zealand, acting as a barometer for how consumers are engaging with digital health.

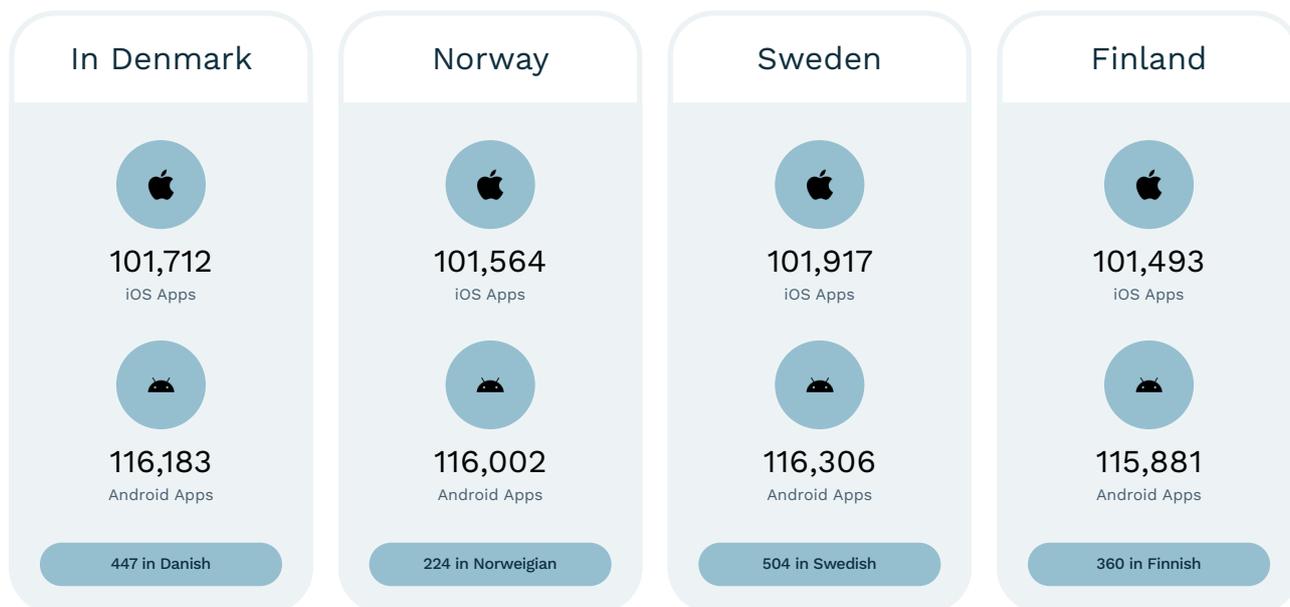
This highlights the variety of health conditions people seek digital health support for.



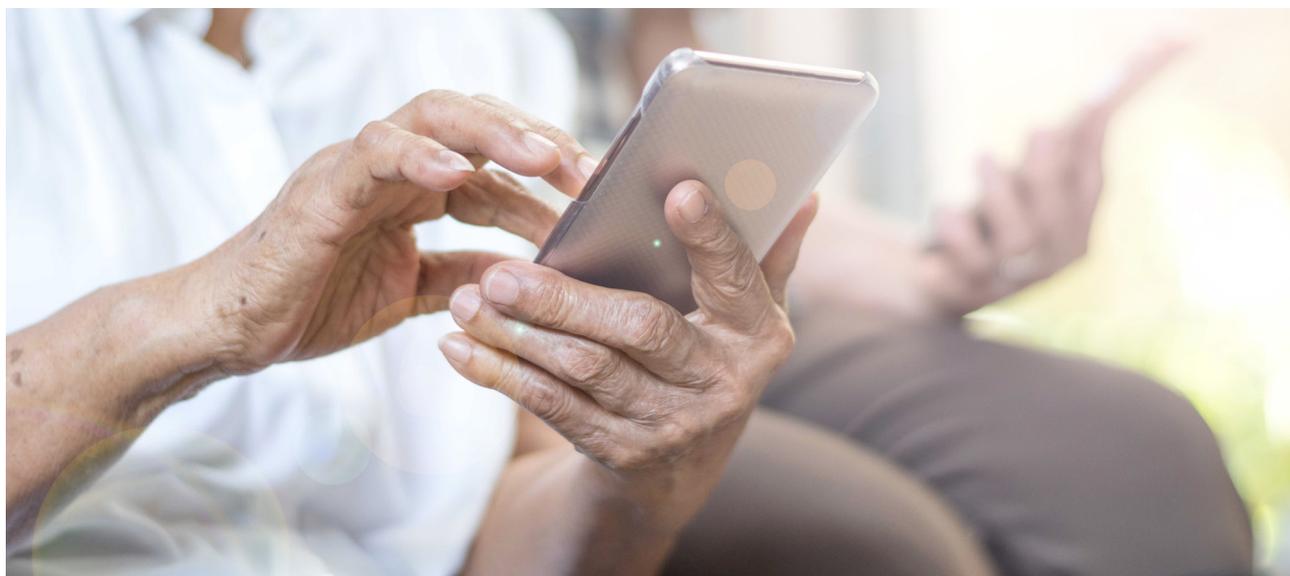
Explosion in Supply of Digital Health

There is a growing supply of solutions to meet this need. Worldwide, there are now more than 400,000 healthcare apps available in app stores⁴, with the global digital health market expected to grow at a compound annual growth rate (CAGR) of 14.8% from 2019 to 2026.⁵

In the Nordics, residents in each country have access to approximately more than 100,000 healthcare apps in app stores.:



Note. Unfortunately, this app data is not currently available for Iceland, but we are working to establish how such data can be acquired. However, it can be assumed that, given the figures are similar across other Nordic countries, similar percentages will be seen in Iceland too.



Quality assurance

Increasing demand for digital health solutions does not simply call for an increase in supply of such solutions, but an increase in the provision of high-quality digital solutions.

Yet despite the popularity of digital health, it is an unregulated market. There is no source for the public or health and care professionals to find digital tools that have been checked for safety and clinical evidence.

Evaluations that have been conducted into the quality of healthcare apps indicate quality levels are low. Evaluations of digital health products available in the UK, found that 80% of apps score below the UK's baseline quality thresholds.⁶

So to increase the adoption of safe digital health, addressing the issue of poor-quality digital health solutions, health bodies around the world are establishing assessment frameworks to uphold quality levels on a country by country basis.

The Nordic Council of Ministers aims that, by 2030, the Nordics will be the most sustainable and integrated health region in the world, providing the best possible personalised health care for all its citizens. In light of this, the Nordic Interoperability Project (N!P) is working towards establishing the Nordics to be the first region in the world to establish common cross-border standards. This will enable patients to live and act in an open, seamless, cross-border healthcare ecosystem, by showcasing and implementing world class solutions and innovations from the Nordics.



Nordic Digital Health & Medication Platform

One of the foundation programmes run by NIP is to look to establish a Nordic Digital Health & Medication Platform for the accreditation and use of healthcare apps. This would be a world first initiative, to establish a framework and platform that crosses borders, spanning multiple countries.

The goal is to create a common shared system to comprehensively assess digital health solutions, in order to understand which solutions can be trusted and adopted by national bodies, organisations, professionals and populations.

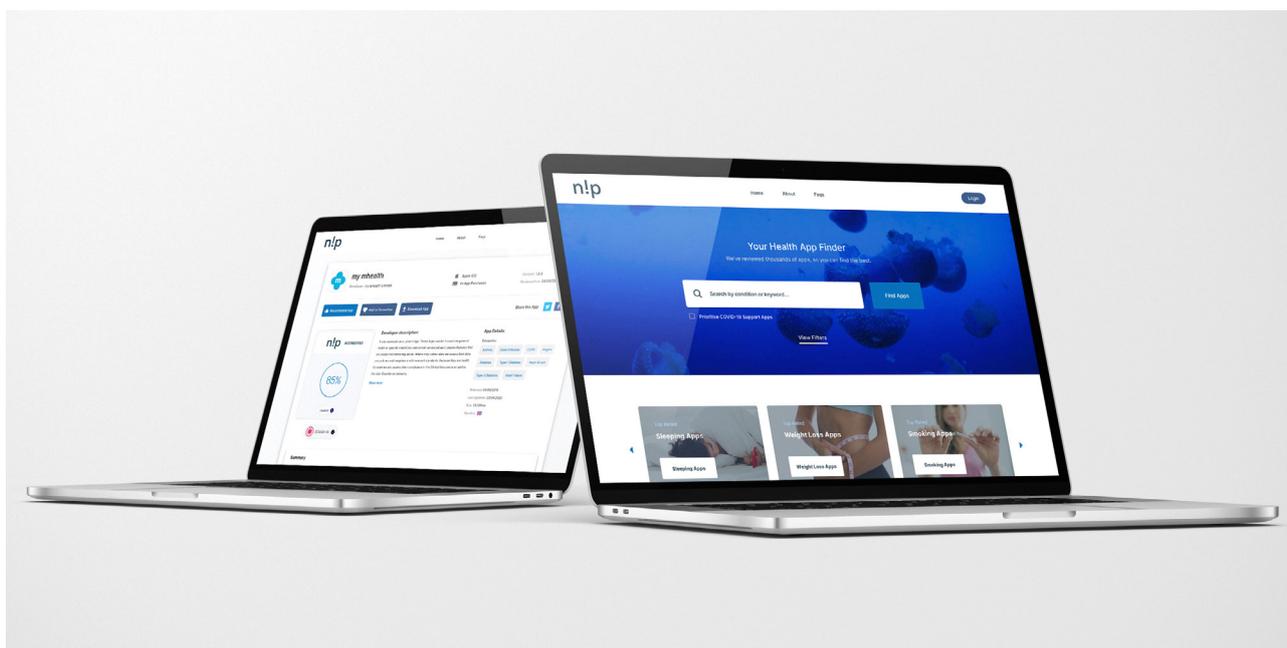
The Nordic-specific system would be best to not look to reinvent the wheel, but where appropriate incorporate criteria developed in other countries, plus the addition of Nordic needs and requirements, delivering an in-depth and workable digital health assessment programme.

Listening to the needs of the Nordics, the programme will include:

- Nordic assessment criteria for digital health to be assessed against.
- The ability for additional country-specific requirements to be added to the reviews.
- A shared review platform that can be accessed by every country.
- A Nordic 'warehouse' for easy distribution and governance of approved solutions.

A Nordic Digital Health Accreditation Programme and associated Platform will enable the five nations to introduce and enforce quality standards in digital health that meet the specific needs across the Nordics. It will enable every Nordic country to equally access the world leading solutions, improving health outcomes and gaining efficiencies, whilst avoiding the harmful or ineffective tools.

The programme would not only help the region's health, but its healthcare industry too. The growing digital health market includes products developed within the Nordics. The programme will actively seek out Nordic technologies to test, helping companies to ensure their products meet national standards and so increase adoption. This will also represent a good stepping stone to the international market.



The Emerging Nordic Innovation Industry

The Nordic countries are often trail blazers, and lead the way in transforming healthcare to meet the challenges of the future. Due to a well-developed and well-organized health and welfare system, the Nordic region is able to offer tailored and innovative welfare solutions both in hospitals, care facilities and homes.

This same leadership is clear within the digital health space. Below are examples of digital health solutions created in the Nordics.

To fuel sustainable adoption not only across the Nordics but on an international platform, it will be essential to assess these and all technologies against Nordic quality criteria. Technologies should be assessed against clinical assurance, data and privacy, and usability and accessibility, plus additional assessment criteria specific to the needs of the Nordics, including country-specific requirements.



Hedia - For Diabetes, developed in Denmark

The Hedia Diabetes Assistant app helps people with insulin-dependent diabetes gain control of their condition. Based on the habits of the individual person with diabetes and personalised input, Hedia generates insulin recommendations by taking all aspects of diabetes into account - such as recording blood glucose readings, keeping track of active insulin, measuring carbs, calculating an insulin dosage, keeping track of activity, and recording blood ketones.

Adelaide Elise Linddal, Clinical Dietitian, Hvidovre Hospital, commended the Hedia app as, “a central tool for evaluating tendencies and set[ting] specific and realistic goals based on the specific patient.”

The app is free to download.



MyDignio - For remote care, developed in Norway

MyDignio is a patient app that communicates with Dignio Prevent, a solution used by healthcare professionals for remote care. As a patient app, MyDignio includes personal tasks related to the patient's health condition. The app is integrated with a large number of measuring devices, such as blood pressure, spirometer, and pulse oximeter. Through a chat, patients can communicate with healthcare professionals. Video consultation can be arranged if needed.

The digital solution, has recently been praised for cutting admissions in a hospital in the UK by almost forty percent, saving the NHS more than two million pounds and empowering patients at home.⁷

The app is free to download.

⁷ <https://manchester-tv.co.uk/new-technology-cuts-hospital-admissions-and-saves-millions-in-stockport/>



Remente - - For self improvement, developed in Sweden

Remente is an online, mental health-based platform for individuals and businesses. The app includes daily interactive coaching and planner, a life assessment tool, goal-setting features, a mood journal and a wide selection of courses and resources to promote and achieve healthier habits.

One user of this innovative platform, commented, “Using an app like this helps to bring about better and healthier self-awareness. [...] This has helped me to navigate my emotional well-being better.”

The app includes in-app purchases.



Triumpf - For chronic illness in children, developed in Finland

Triumpf is a patient app for children. The app aims to reduce the negative psychological changes associated with chronic illness through a mobile health game, and has been designed to help children take an active role in their own health. Triumpf offers children an informative, yet fun journey to empower them with skills and knowledge to help them develop. Starting from chronic illnesses and the mental burden related to disease management, the platform has now expanded in response to the coronavirus pandemic to cater to children without health issues. The app, is free to download but does require patients to have a referral code from their doctor in order to play the game.



RetinaRisk - For diabetes, developed in Iceland

The RetinaRisk app is designed to enable individuals with diabetes to calculate their personalised risk of sight-threatening diabetic retinopathy, which is one of the leading causes of blindness in the world. RetinaRisk can play an instrumental role in early detection by calculating the risk of diabetic eye disease and allowing users to understand which are the key underlying risk factors, and which lifestyle changes can lower the risk. The RetinaRisk app includes an eye screening feature, a data section to enable users to view how their risk progresses over time, and an analysis section to enable users to determine the best course of action to lower their risk if needed.

This app is free to download but includes in-app purchases.



Sidekick

The SideKick App is designed to motivate and engage people towards a healthy lifestyle. It features a food diary, step counter, educational videos and weekly missions, all of which earn you points. You can choose to compete with friends if they also have SideKick to get the highest points. There is also a community where tips and advice is shared. The goal is to encourage users to engage in health-improving tasks across nutrition, physical activity and mental exercises. The app was developed by doctors, psychologists and other health experts at the Scandinavian mobile-health developer GoodlifeMe.

This app is free to download and use.

In Summary

As we look to the future of digital health enabling empowered citizens and a more patient-centred system, the Nordics can lead the world on a sustainable shared system for its adoption. Given the lack of regulation, the region will establish and uphold standards in a thoughtful way that meets the needs of the region and each country.

The best digital health has the ability to improve outcomes and bring efficiencies, the programme will seek these solutions out and put them in the hands of the Nordic population. It will shine a light on the best Nordic products, enabling these innovations to flourish and grow.

To find out more about the programme, please visit:

nordicinteroperability.com



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