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Understanding the UK Market for Health Technologies

Wednesday 15th February 2023

South East Health Technologies Alliance

WE WORK WITH INNOVATORS TO TRANSFORM HEALTHCARE

Shaping the Landscape

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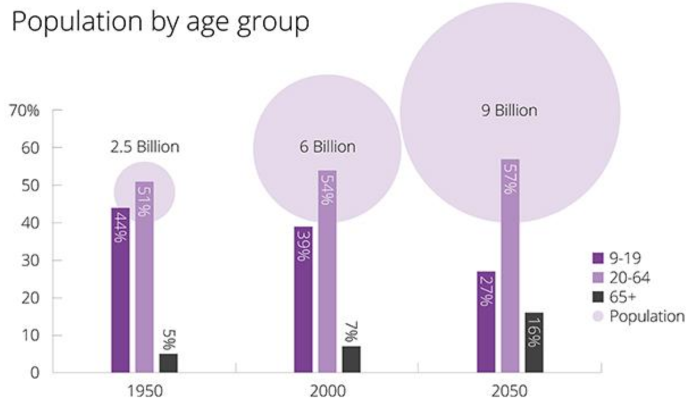
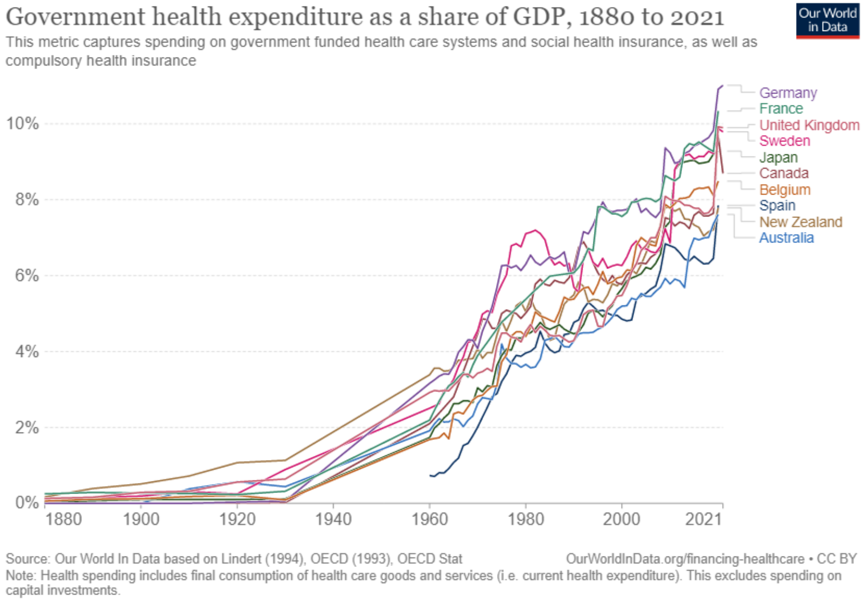
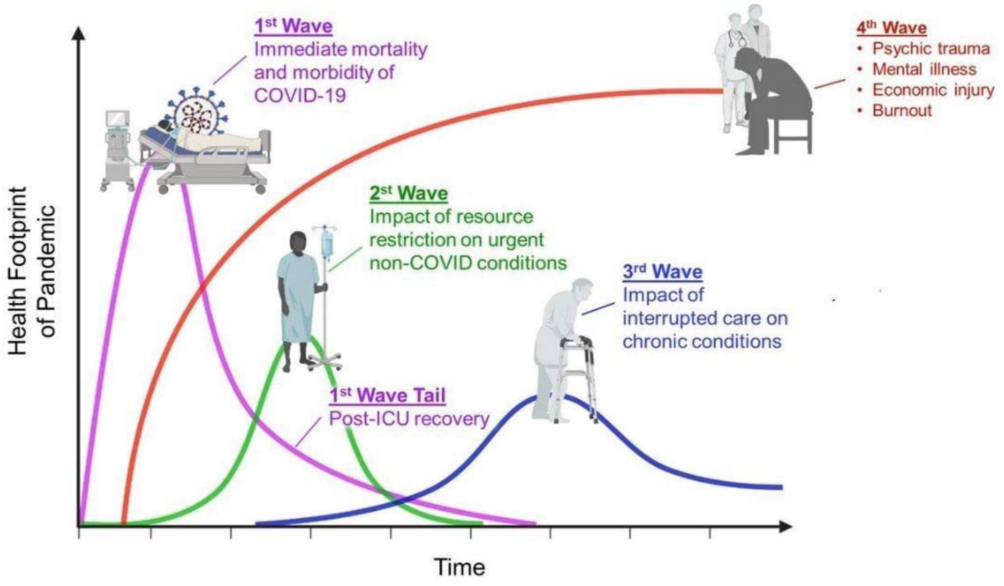
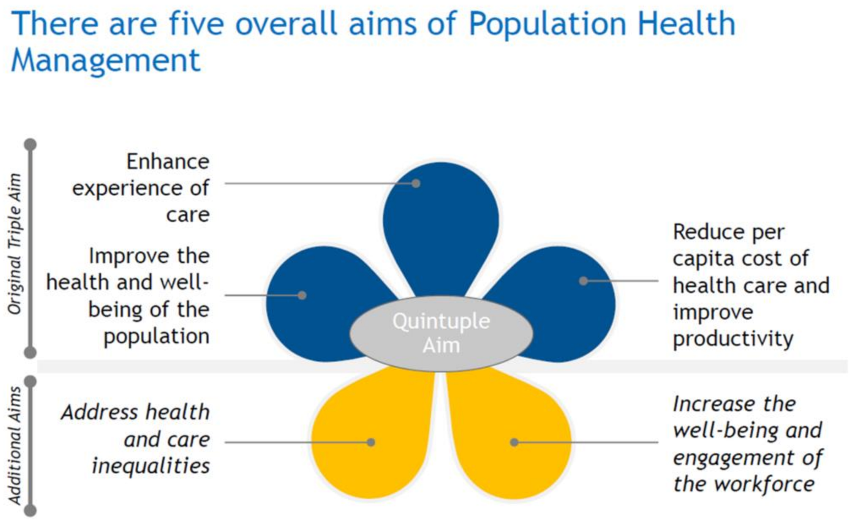
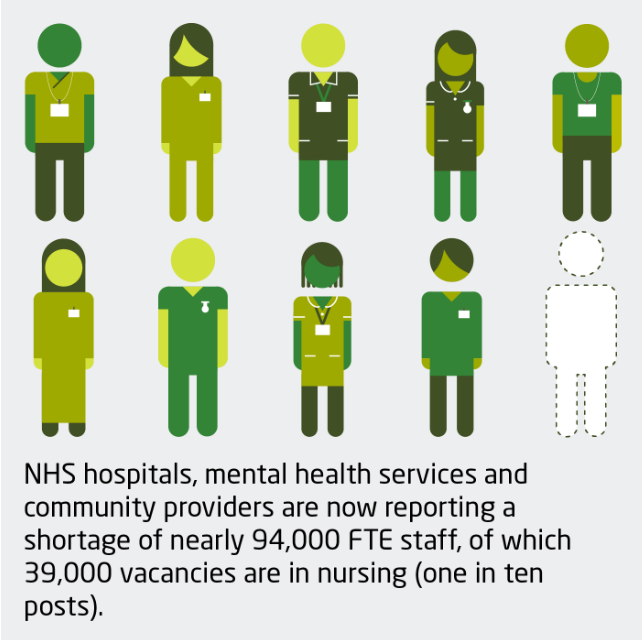






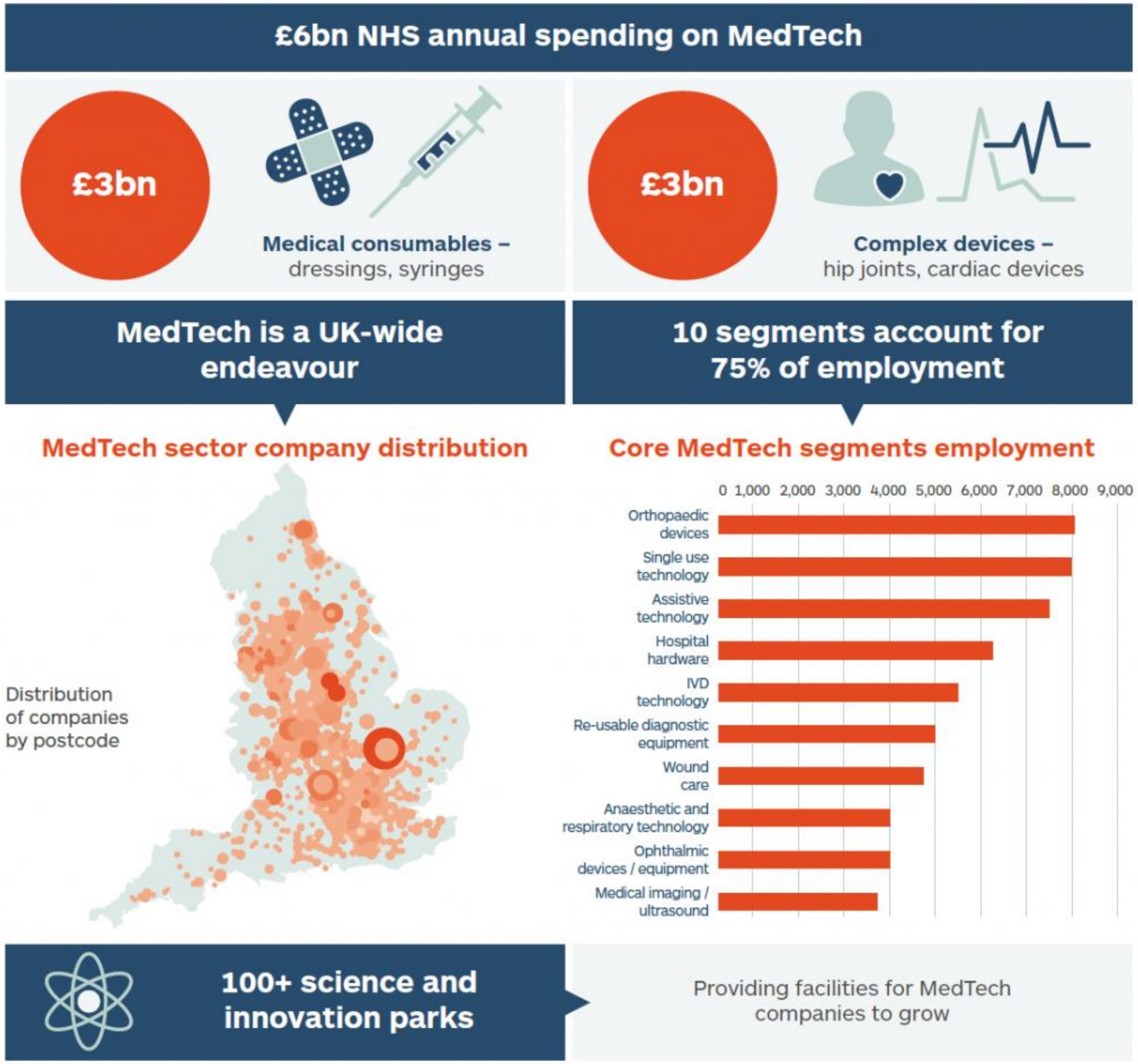
Shaping the Landscape - UK

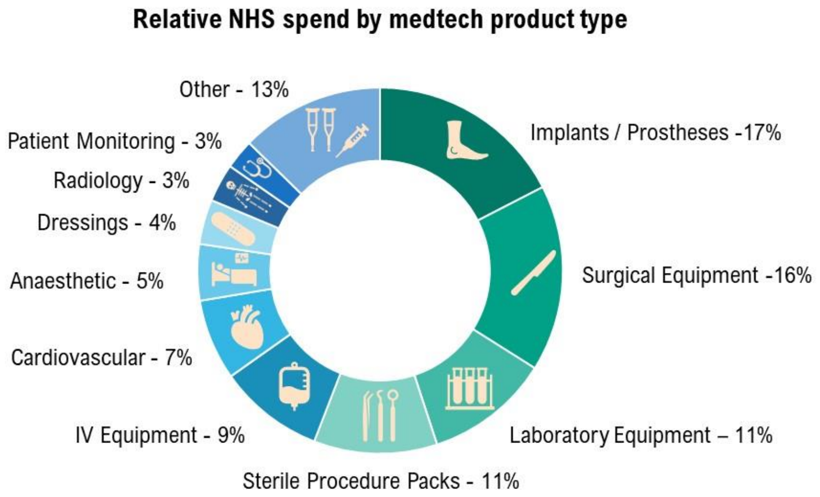




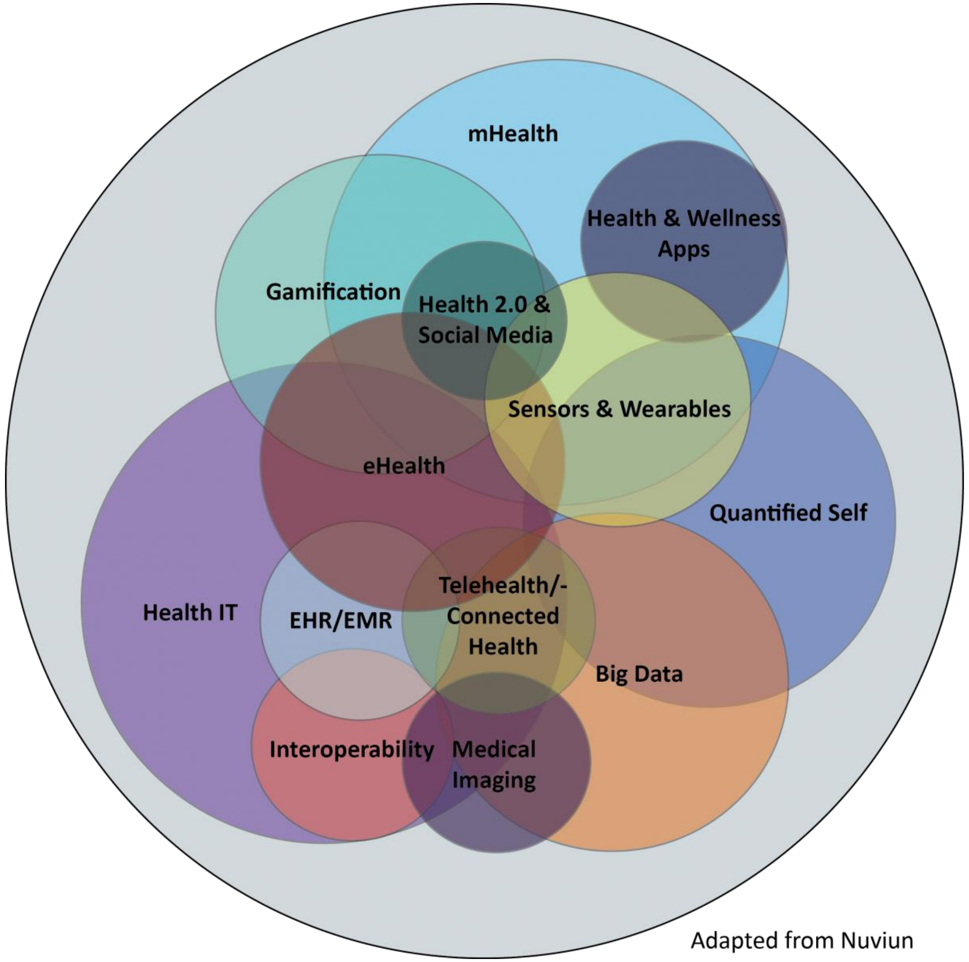
UK – MedTech industry – Key figures

The Landscape for MedTech





The Landscape for Digital Health Technology



Adapted from Nuviun

DHT Market – the Value

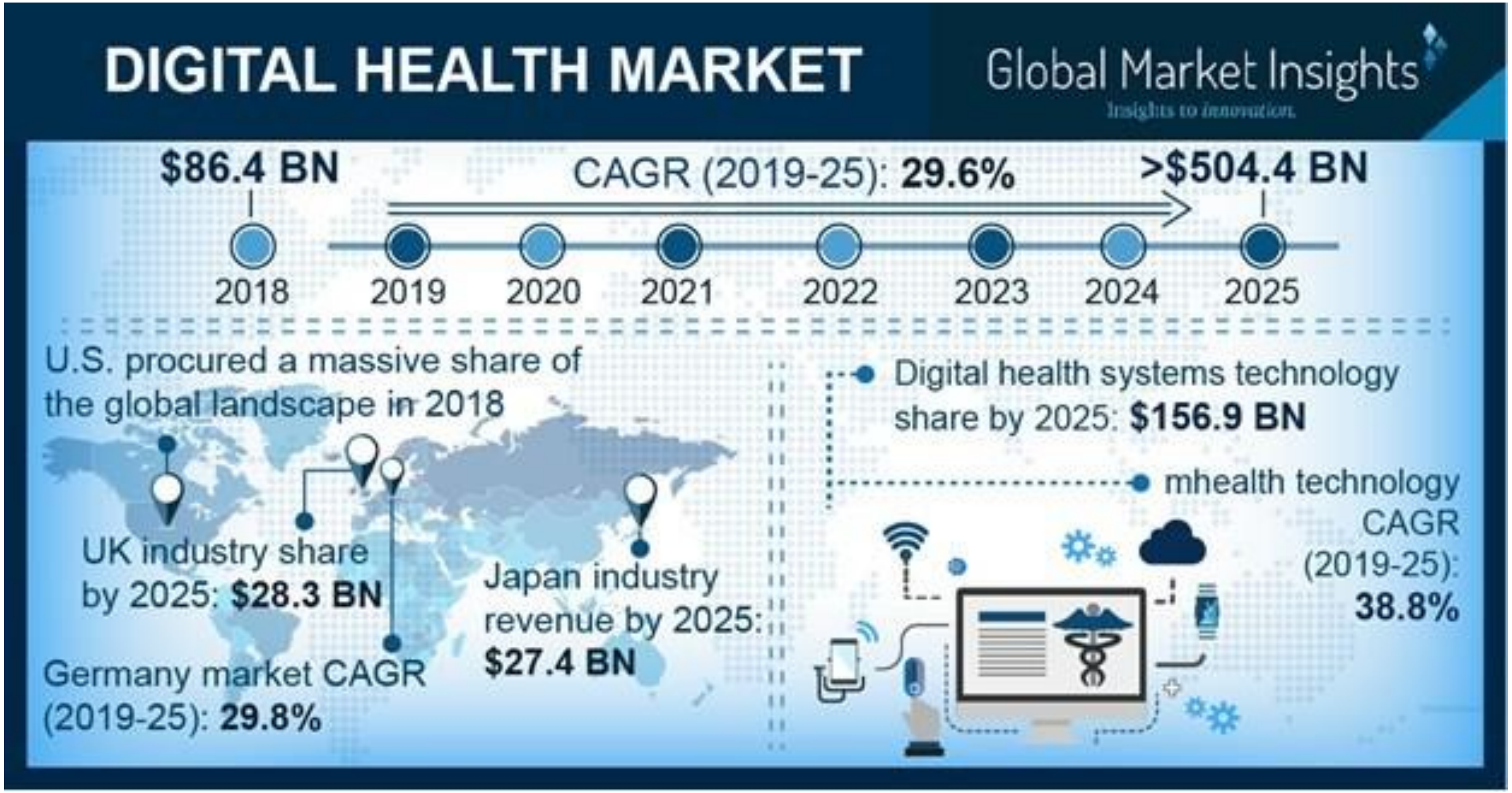
The overall body of clinical evidence on app efficacy has grown substantially and now includes **571 published studies**, enabling the identification of a list of Top Apps with increasingly robust clinical evidence.

The use of such Digital Health apps in just five patient populations where they have proven reductions in acute care utilisation (**diabetes prevention, diabetes, asthma, cardiac rehabilitation and pulmonary rehabilitation**) could save the U.K. healthcare system an estimated **£170 million per year**. This represents about 1.1% of total costs in these patient populations. If this level of savings could be extrapolated across total national health expenditure, **annual cost savings of £2 billion could be achieved.**

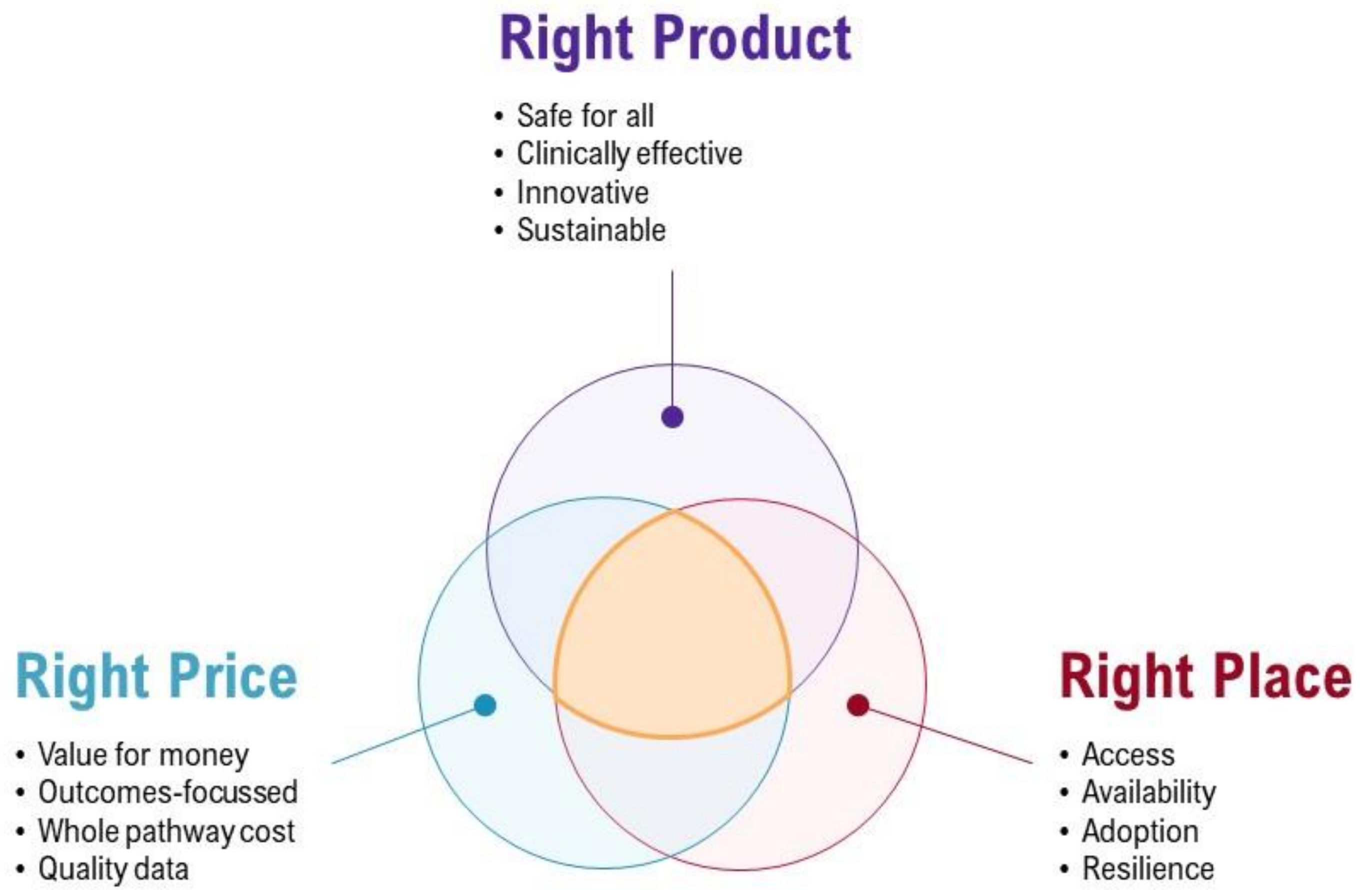
Efforts by patient care organisations to fit Digital Health tools into clinical practice has progressed, with **860 current clinical trials globally** incorporating these tools.

*Source - **IQVIA***

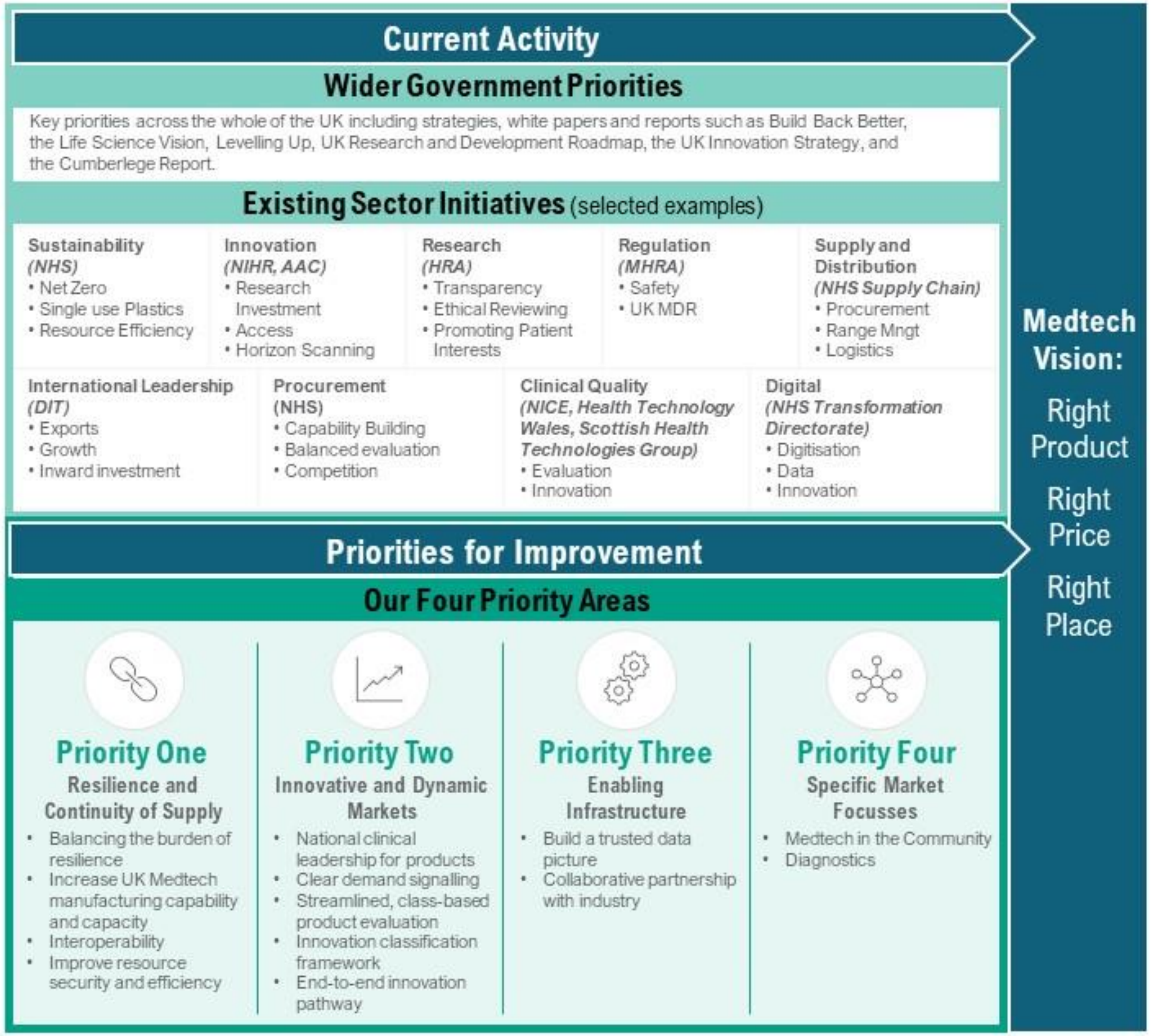
DHT – Market Growth



UK MedTech - Vision



UK MedTech - Strategy



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UK - The Challenges

Pressure on healthcare expenditure

Navigating the 'Ecosystem'

Changing behaviour

Fear of/Time to Change

Digital maturity

Adoption rates are Low (13%)

- Legacy
- Procurement processes are unclear or absent
- Are they 'Fit for Purpose'?

UK - A Solution? Integrated Care Systems

- Person centred
- Partnerships between NHS, local authorities, voluntary sectors, social enterprises
- Geographically/community-based
- Moving away from costs/payments to outcomes
- Part of NHS long term plan
- Evolved from STPs (sustainability and transformation partnerships)
- Total of 42 ICS covering England
- Make a lot of sense!

Current UK - EPR landscape

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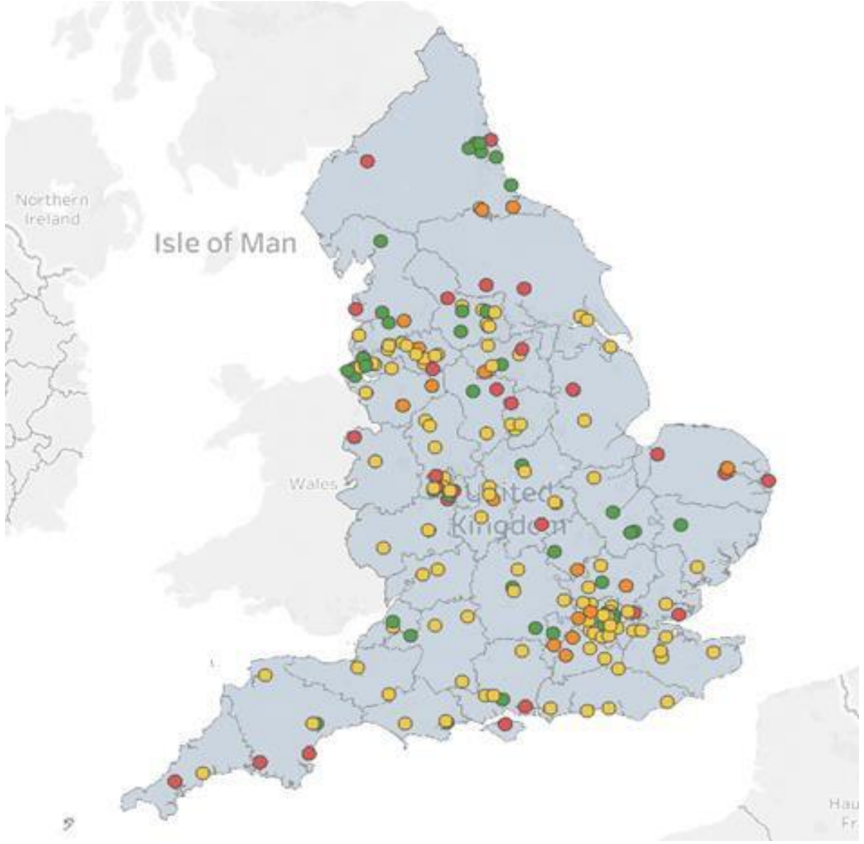

Group	Definition	No of Trusts	% of Trusts
Group 3	Existing EPR meets required standard	49	23%
Group 2	Existing EPR needs extension/optimisation to meet required standard	132	63%
Group 1	No EPR - in procurement or implementation	11	5%
Group 0	No EPR - in business case development	19	9%

UK – NHS Frontline digitisation ambition

Coverage

- ❑ 90% of providers will have an EPR in place, and all remaining providers will be in implementation, by December 2023
- ❑ 100% of providers will have an EPR in place by March 2025

Capability

- ❑ As many providers as possible will meet our minimum capability standard for digitisation (equivalent to HIMSS5) by March 2025

Convergence

- ❑ All ICSs will develop a convergence strategy, appropriate to local context, in Digital Investment Plans

Featured Opportunity - Technology Enabled Care Services (TECS)

Around 18,000 nursing & care homes in the UK

Over 90% owned by private sector

Care market worth over £10 billion p.a.

TECs

Detection

- Telecare alarms (pendant, wrist, waist, smartphone)
- Mats and Flooring
- Acoustic
- Motion

Prevention

- Risk assessment (NICE guidelines)
- Smart patches (infection etc)
- Gait analysis

Rehabilitation

- Improve muscle strength and balance
- Messaging
- Telerehabilitation
- Games

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