

SEHTA & ACCIO

Understanding the UK Market for Health Technologies

Wednesday 15th February 2023

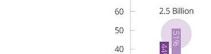
South East Health Technologies Alliance we work with innovators to transform Healthcare

Shaping the Landscape



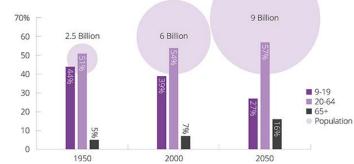
Germany France 10% United Kinadom Sweden Japan Canada Belgium 8% Spain New Zealand Australia 6% 4% 2% 1900 1920 1940 1960 1980 2000 2021 1880

Source: Our World In Data based on Lindert (1994), OECD (1993), OECD Stat OurWorldInData.org/financing-healthcare • CC BY Note: Health spending includes final consumption of health care goods and services (i.e. current health expenditure). This excludes spending on capital investments.

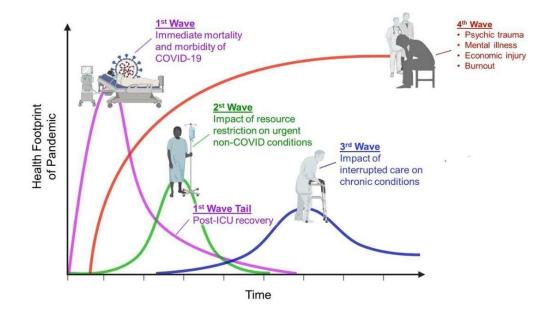


Our World in Data

Population by age group

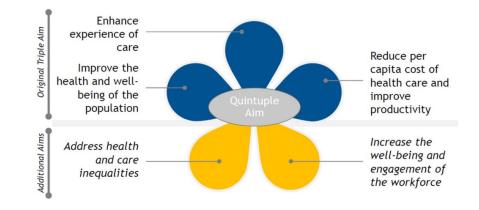






Shaping the Landscape - UK

There are five overall aims of Population Health Management





NHS hospitals, mental health services and community providers are now reporting a shortage of nearly 94,000 FTE staff, of which 39,000 vacancies are in nursing (one in ten posts).



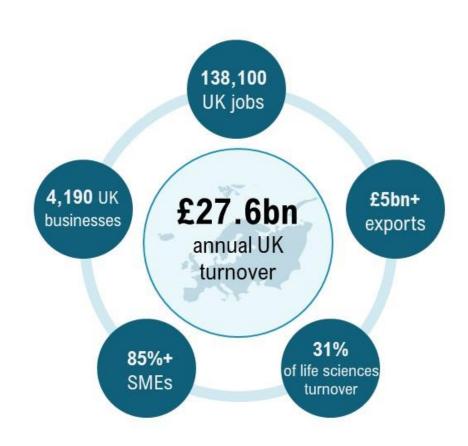




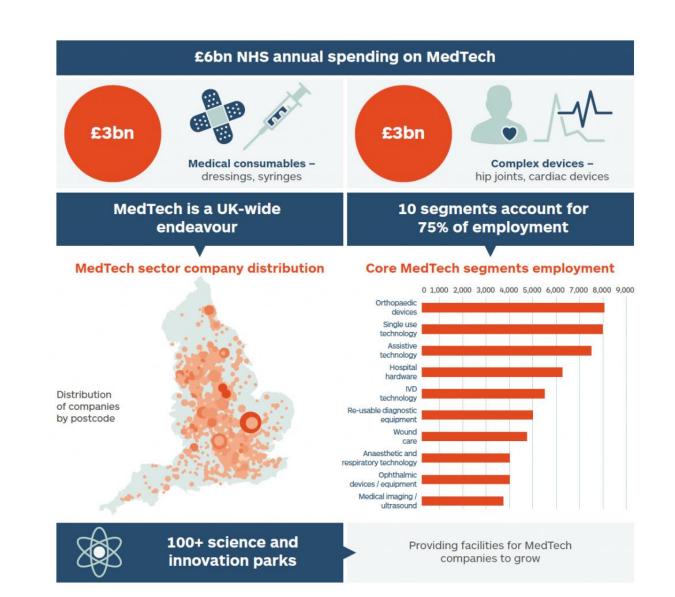
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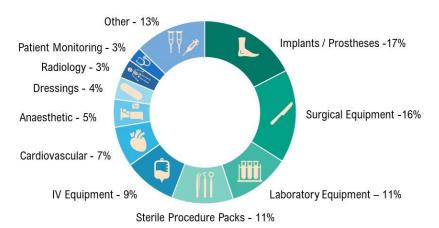


The Landscape for MedTech



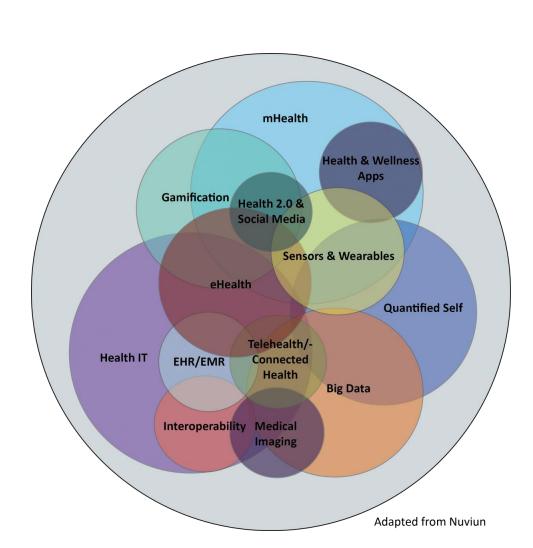


Relative NHS spend by medtech product type



The Landscape for Digital Health Technology





DHT Market – the Value

SEHTA increasing wealth

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.

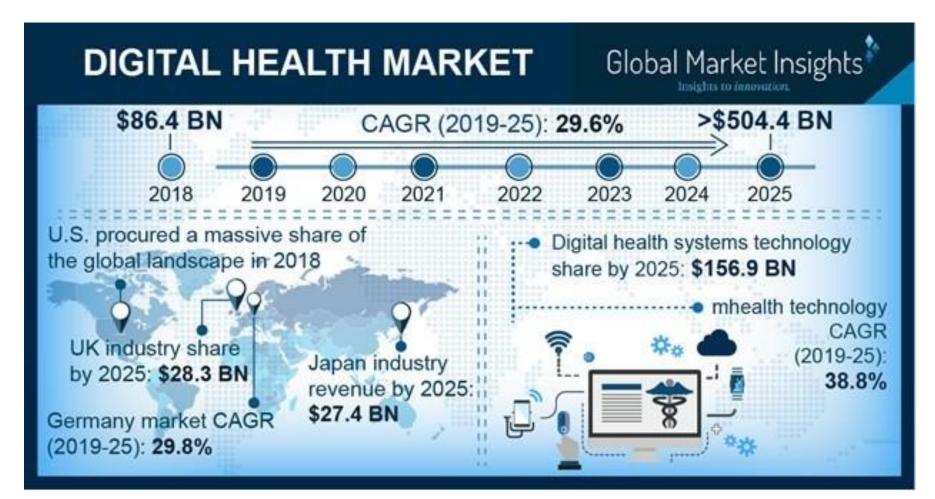
The use of such Digital Health apps in just five patient populations where they have proven reductions in acute care utilisation (diabetes prevention, diabetes, asthma, cardiac rehabilitation and pulmonary rehabilitation) could save the U.K. healthcare system an estimated £170 million per year. This 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

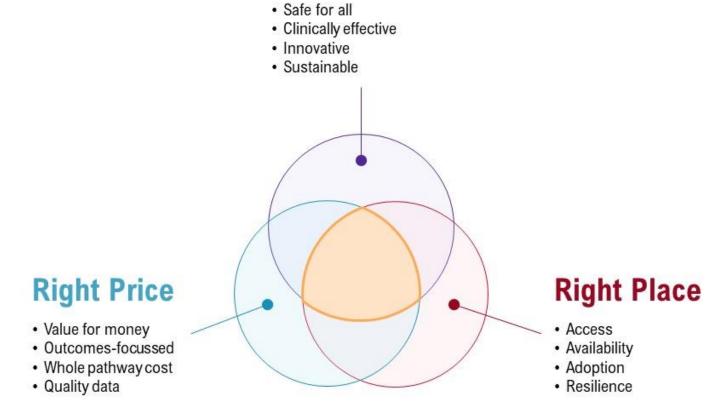




UK MedTech - Vision



Right Product



UK MedTech - Strategy

SEHTA ingroving health increasing wealth

Current Activity

Wider Government Priorities

Key priorities across the whole of the UK including strategies, white papers and reports such as Build Back Better, the Life Science Vision, Levelling Up, UK Research and Development Roadmap, the UK Innovation Strategy, and the Cumberlege Report.

	Existing Secto	orInitia	tives (se	lected example	s)
Sustainability (NHS) • Net Zero • Single use Plastics • Resource Efficiency	Innovation (NIHR, AAC) • Research Investment • Access • Horizon Scanning	Research (HRA) • Transpare • Ethical Re • Promoting Interests	eviewing	Regulation (MHRA) • Safety • UK MDR	Supply and Distribution (NHS Supply Chain) • Procurement • Range Mngt • Logistics
nternational Leadersh DIT) Exports Growth Inward investment	ip Procurement (NHS) • Capability Buildin • Balanced evaluat • Competition			alth Technology ottish Health gies Group) n	Digital (NHS Transformation Directorate) • Digitisation • Data • Innovation
				vement	
	Our	Four Pr	iority A	reas	
Priority One Resilience and Continuity of Supply Balancing the burden resilience Increase UK Medtech manufacturing capab and capacity Interoperability Improve resource security and efficienc	of • National clinical leadership for p • Clear demand s • Streamlined, cli product evaluat • Innovation class framework	Dynamic s l products signalling ass-based tion sification	E Infr • Build a picture	rative partnership	Priority Four Specific Market Focusses • Medtech in the Community • Diagnostics



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

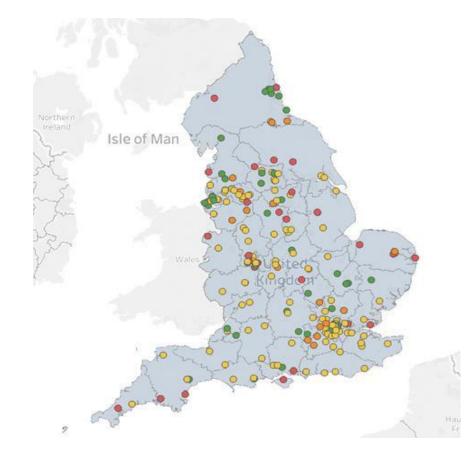
Evolved from STPs (sustainability and transformation partnerships)

Total of 42 ICS covering England

Make a lot of sense!

Current UK - EPR landscape

WWW.SEHTA.CO.UK



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

□ 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

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

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





Convergence

Coverage

Capability

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.

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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





TO FIND OUT MORE ABOUT SENTA, CONTACT US: info@sehta.co.uk www.sehta.co.uk





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