

TECHNOLOGY IS GREAT

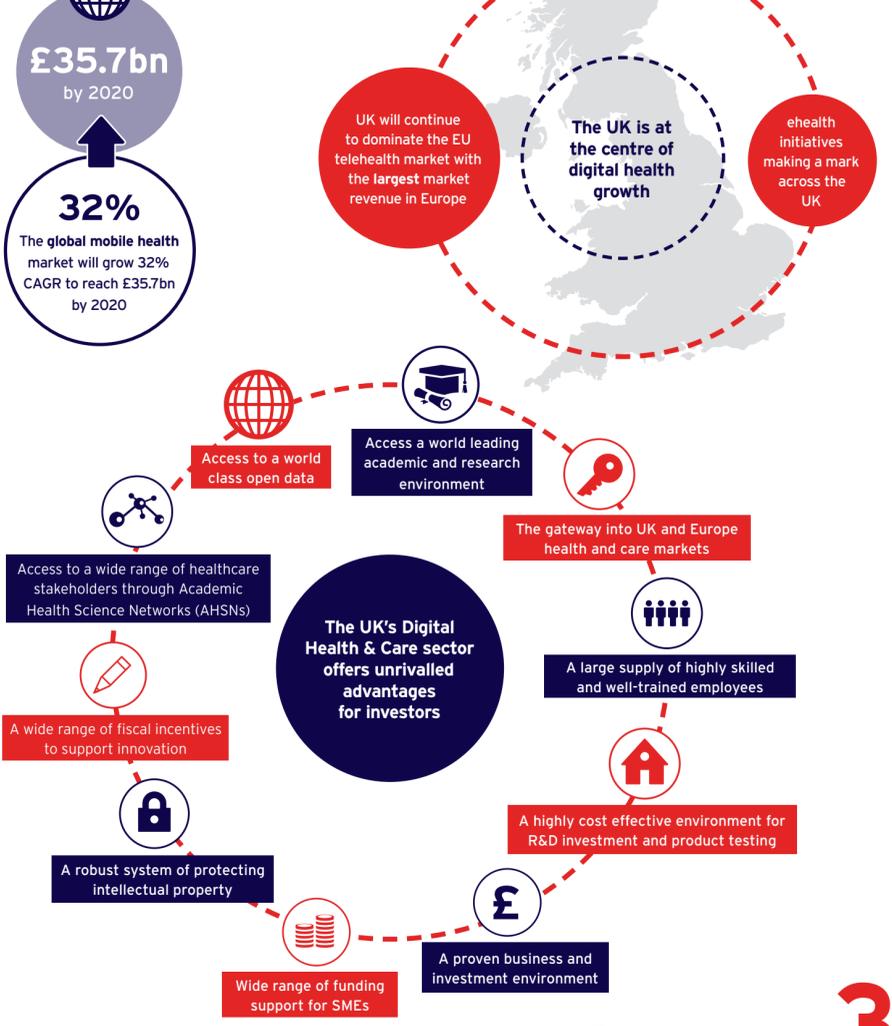
BRITAIN



Digital Health & Care

The global Digital Health & Care market is expanding rapidly. Now is the time for companies to actively participate in this growing and diversifying market.

Sector Overview



1 The UK is gearing up for growth and offers key sector opportunities

Three key sectors:

National Health Service (NHS)	growing market	2 Private healthcare	spent c £17 billion in 2013/14
the largest unified healthcare system in the world	estimated to reach £35 billion by 2015		
spent c £120 billion across the UK in 2013/14			
treats almost 1 million patients a day from diverse ethnicities			
good patient data			

3 Social care

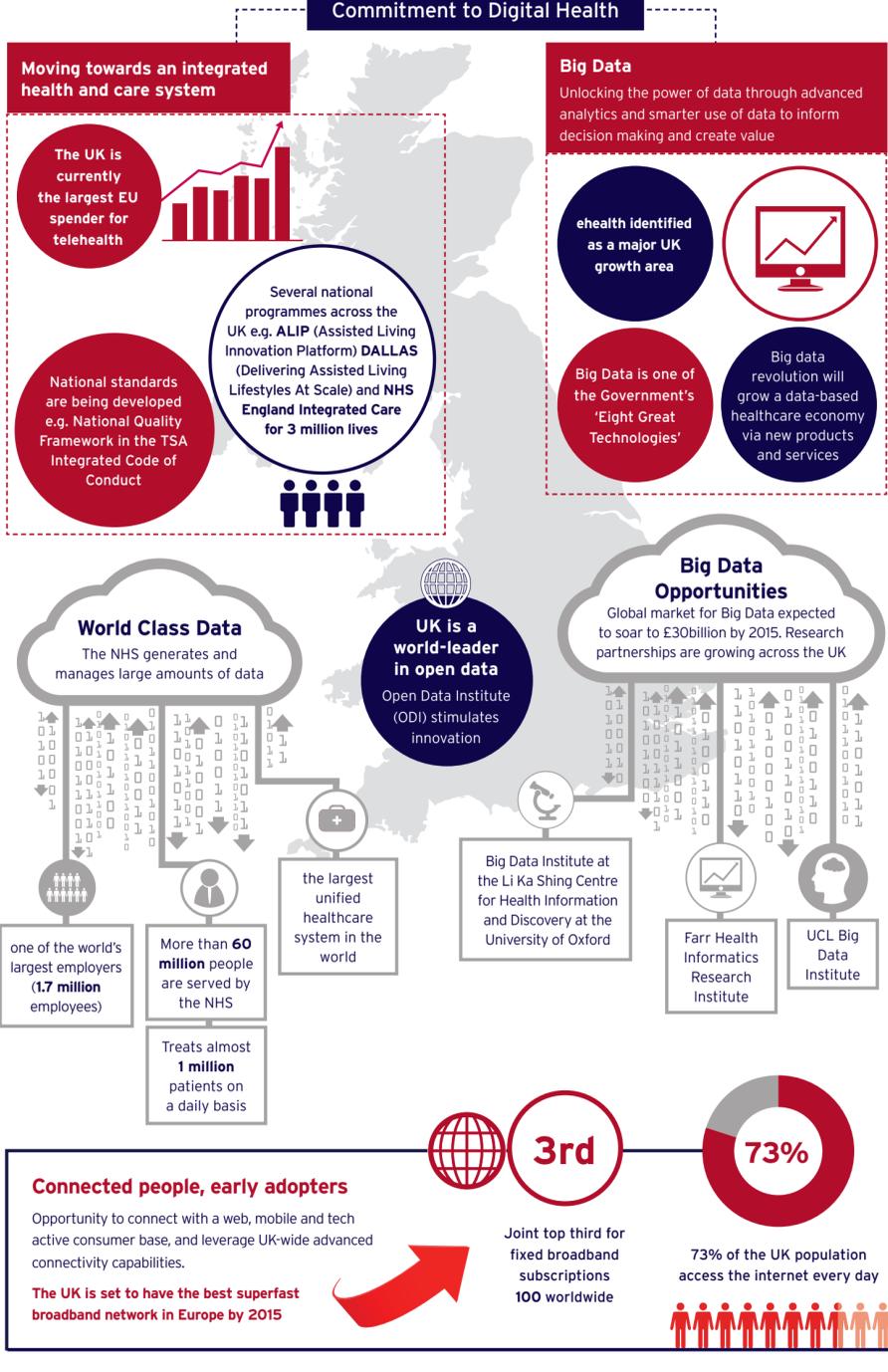
Opportunities for growth

The UK has growing number of people with Long Term Conditions (LTCs)

NHS faces the challenge to achieve **£20 billion** in efficiency savings by 2015

Market Opportunity

UK's digital health core offer - achieving better health outcomes for patients through technology

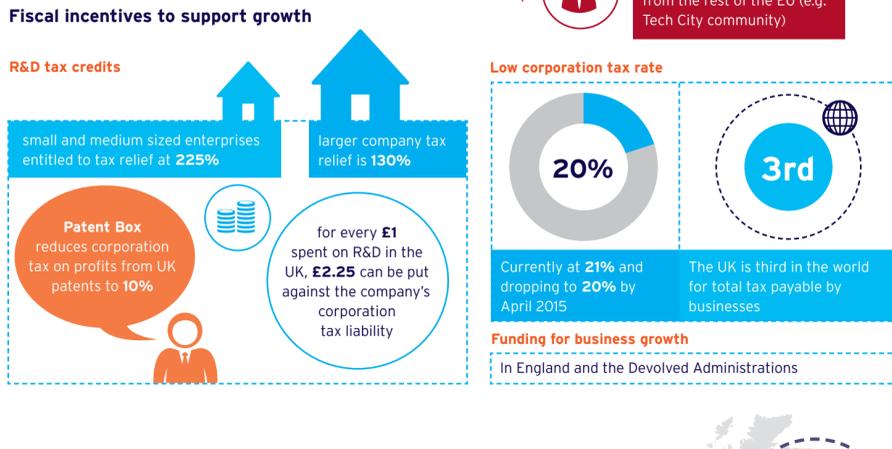
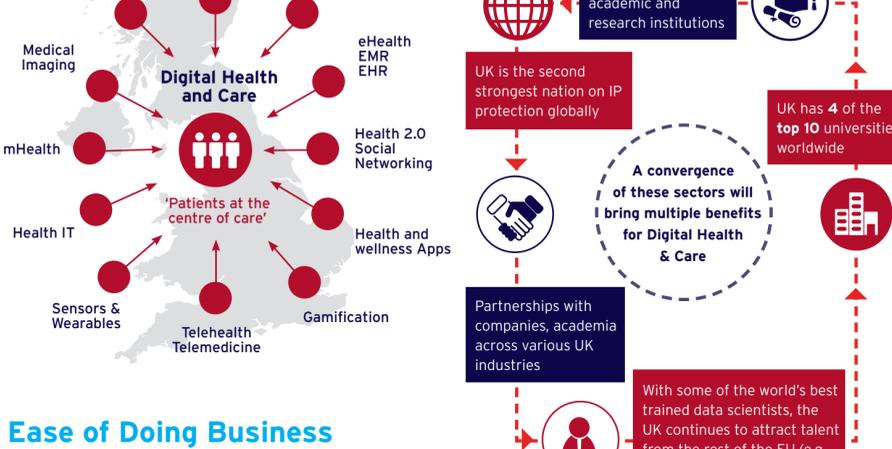


The UK is a nation of early adopters keen to engage with the digital health revolution

50% use the internet to self-diagnose	75% of the UK population go online for health information	80% would like to view medical records online	90% would use a service letting you ask a clinician a question
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Future opportunities

Accessing, managing and sharing health and care records online	Sharing reviews, experiences and creating social health networks	Offering better reporting, improved referrals, linked appointments and enhanced service management
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- Market success**
- UK Case Studies**
- Clinical Digital Maturity Index (CDMI)**
- CDMI is an important step to realising NHS England's Digital Vision
- www.ehi.co.uk
- www.england.nhs.uk
- European Connected Health (ECH) Alliance**
- Supports the wider adoption of healthcare and wellbeing products and services across Europe
- www.echalliance.com
- UK Biobank**
- A unique data source with over 500,000 participants is the most detailed study of its kind
- www.ukbiobank.ac.uk
- Mastodon C**
- Open data identifies £200million potential prescription savings
- www.mastodonc.com
- www.nihr.ac.uk
- Aridhia**
- Aridhia uses health informatics and analytics to improve chronic diseases
- www.aridhia.com
- Cellnovo**
- Cellnovo, formed in Swansea, is a world leading innovator in Mobile Diabetes Management technology
- www.cellnovo.com

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