

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

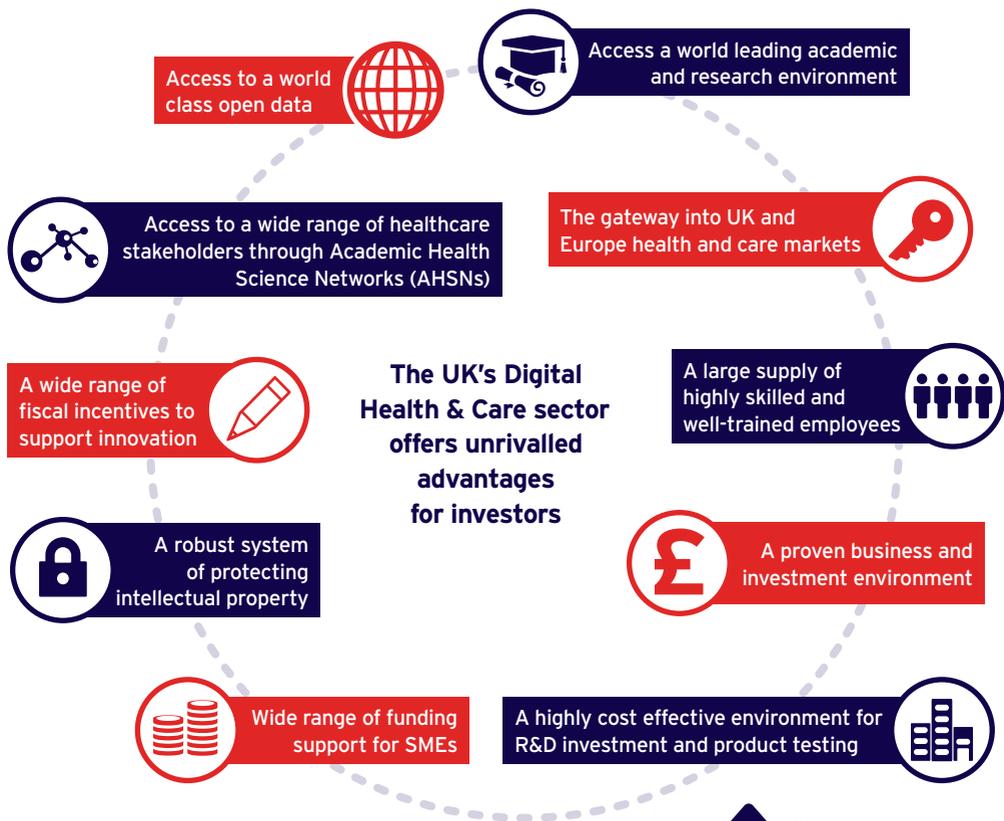


A map of Europe with three callout circles. A red circle in the top left contains text about the UK's market position. A dashed blue circle in the center contains text about the UK's role in digital health growth. A red circle in the bottom right contains text about ehealth initiatives in the UK. A large red dashed line circles the entire map area.

UK will continue to dominate the EU telehealth market with the largest market revenue in Europe

The UK is at the centre of digital health growth

ehealth initiatives making a mark across the UK



The UK offers opportunities across three key sectors

1 National Health Service (NHS)

- The largest unified healthcare system in the world
- Spent **c £128 billion** across the UK in 2011-12
- Treats almost **1 million** patients a day from diverse ethnicities
- Good patient data

2 Private healthcare

- Growing market, estimated to reach **£35 billion** by 2015

3 Social care

- Estimated at **£23 billion** in 2011

Gearing up for growth

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

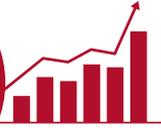
NHS faces the challenge to achieve **£20 billion** in efficiency savings by 2015

Market Opportunity

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

Moving towards an integrated health and care system

The UK is currently the largest EU spender for telehealth



National standards are being developed e.g. National Quality Framework in the TSA Integrated Code of Conduct

Several national programmes across the UK such as **ALIP** (Assisted Living Innovation Platform), **DALLAS** (Delivering Assisted Living Lifestyles At Scale) and **NHS England Integrated Care for 3 million lives**

Big Data

Unlocking the power of data through advanced analytics and smarter use of data to inform decision making and create value

Big Data is one of the Government's 'Eight Great Technologies'

ehealth identified as a major UK growth area

Big data revolution will grow a data-based healthcare economy via new products and services



UK is a world-leader in open data

Open Data Institute (ODI) stimulates innovation

World Class Data

The NHS generates and manages large amounts of data

one of the world's largest employers
1.7 million employees

More than **60 million** people are served by the NHS

Treats almost **1 million** patients on a daily basis

the largest unified healthcare system in the world

Big Data Opportunities

Global market for Big Data expected to soar to **£30 billion** by 2015. Research partnerships are growing across the UK

Farr Health Informatics Research Institute

Big Data Institute at the Li Ka Shing Centre for Health Information and Discovery at the University of Oxford

UCL Big Data Institute

Connected people, early adopters

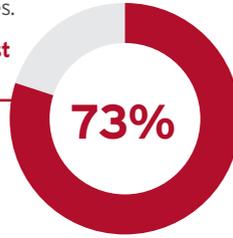
Opportunity to connect with a web, mobile and tech active consumer base, and leverage UK-wide advanced connectivity capabilities.

The UK is set to have the best superfast broadband network in Europe by 2015



3rd

Joint top third for fixed broadband subscriptions worldwide



73% of the UK population access the internet every day



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

Future opportunities



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



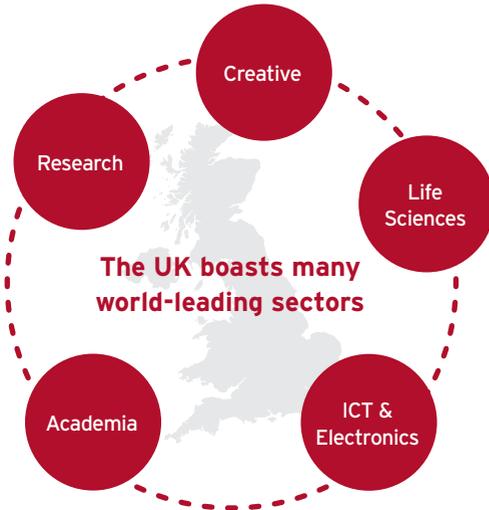
90%

would use a service letting you ask a clinician a question

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



A convergence of these sectors will bring multiple benefits for Digital Health & Care



Access talent from the world's leading academic and research institutions



UK has 4 of the top 10 universities worldwide



The UK continues to attract talent from the rest of the EU



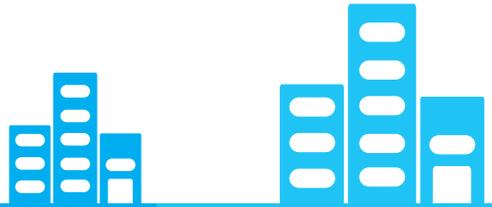
Partnerships with companies, academia across various UK industries



UK is the second strongest nation on IP protection globally

Ease of Doing Business

Fiscal incentives to support growth



For every **£1** spent on R&D in the UK, **£2.25** can be put against the company's corporation tax liability

R&D tax credits

Small and medium sized enterprises entitled to tax relief at **225%**

larger company tax relief is **130%**

Patent Box reduces corporation tax on profits from UK patents to **10%**

Low corporation tax rate



Currently at **21%** and dropping to **20%** by April 2015



The UK is third in the world for total tax payable by businesses



Funding for business growth In England and the Devolved Administrations

Rich and Diverse Ecosystem

Sector Funding Opportunities



£1bn
The Government and NHS are investing **£1 billion** in technology over the next 3 years

Safer Wards, Safer Hospitals
£260 million Technology Fund

Digital Economy Research Hubs
£12m
£12 million fund from EPSRC

£6m

Digital Health in a hospital setting
Worth approx **£6 million**



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 £200m 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

For a dynamic company location and stable investment environment, choose the UK. Contact us at enquiries@ukti-invest.com or visit www.ukti.gov.uk



**UK Trade
& Investment**