

United Kingdom Connected Health Market Analysis Report



Overview

This ARCH report provides an overview of the Connected Health market in the UK – with a particular focus on England as the largest market within the UK region. The report gives an overview of the healthcare financing and payment structures, the potential sales channels and routes to market for Connected Health providers. The report provides information and suggested strategies for selling into statutory commissioners such as NHS England and Clinical Commissioning Groups (CCGs). It gives an overview of the Connected Health market landscape – including competition, size and value, reimbursement landscape and overall SWOT analysis. This report also looks at one condition, dementia, in more detail. This provides an exemplar of how Connected Health technologies are being used in the care pathway of one of the most costly conditions for the UK healthcare system.

Report Outline

Chapter One outlines the overall healthcare landscape within the region – looking at who pays for; who provides; and who regulates healthcare in England. As is the case with many western health care systems, an aging population combined with pressure to cut healthcare costs is creating a drive towards improving efficiencies while maintaining and improving patient outcomes. Needing to ‘do more with less’ is a key issue in the English healthcare system, and in an effort to improve efficiencies, the government has introduced some major changes to the UK healthcare system as a whole. These are discussed in Chapter One, along with the overall financing system for care in the UK in general and England in particular. Chapter Two then focuses in particular on dementia in England – providing an overview of the main care pathways; how patients are cared for and who pays for this care. Chapter Two also looks at the current use and uptake of Connected Health within dementia care in England. Finally Chapter Three gives an overview of the market for Connected Health in England. It looks at the key drivers of Connected Health; the market size and value; the competitive landscape; and the key challenges to the development of Connected Health within the English market.

Benefits

This report provides a useful starting point for any company or group wishing to learn more about the UK market for Connected Health. It outlines potential opportunities for providers operating within the Connected Health space, and draws together a wide variety of market information to give a rich overview of the market context and how best to maximise growth opportunities. It provides an overview of the

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key purchaser in the market, their key drivers and how Connected Health providers can help them to achieve their aims.

This report draws together the findings from primary and secondary data analysis within the UK healthcare market. The report includes a synthesis of data gathered from a review of government and third party publications on the healthcare market; on dementia care; and on Connected Health within the UK, in general, and England in particular. Allied to this secondary research; interviews were conducted with key stakeholders within the English healthcare system. This includes primary care commissioners within one of the countries CCGs; healthcare professionals working on projects which aim to use technology to support the reduction in hospitalisation amongst people with dementia; and representatives from one of the recently-established Academic Health Science Networks (AHSN). These interviews provided a useful context within which to explore and further understand the nuances of the English healthcare system.

Companies with a commercial interest in these connected health opportunities or who are interested in collaborating with ARCH should contact Alica May, Project Co-ordinator on info@arch.ie or call 01 7165400.