

Is the future of healthcare digital?

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LaingBuisson has today launched the first edition of its Digital Health UK Market Report.

Uniquely for LaingBuisson, the report focuses on the NHS. This is because the NHS is the dominant buyer in the UK's £5 billion healthcare IT and digital market, with the private sector only accounting for spend of around £250 million per year. Technologies are frequently tried and tested in the NHS before adoption by the private sector.

This new report specifically looks at how technology is used in the support of patients; the administration of UK healthcare organisations; and the general delivery of healthcare services. The report covers key technologies across Secondary care, Primary, Community and Mental Health, as well as new wave digital solutions and technologies supporting integrated care such as shared health records.

The technologies are considered as first generation, namely legacy technologies embedded in UK healthcare; second generation, the current landscape of technologies and suppliers; and third generation, how healthcare providers in the UK can adopt new technologies coming on stream.

In looking at the third generation, the report looks at the drivers for change, including digital apps, wearables, artificial intelligence and interoperability. These are a very small but growing part of the healthcare IT and digital scene compared with the larger IT systems already working in the NHS, and in looking to the future, the report looks to remove some of the hype and hyperbole surrounding the digital revolution in healthcare and predict where real future growth will come from.

Martin Bell, report author, said:

"Future opportunities for new, digital technologies are vast, worth trillions of pounds globally. UK health services must change service delivery models to meet growing clinical and workforce pressures and patient expectations, but the journey towards mass digitisation will take longer in some areas than it has in other markets.

"Key areas for digital health futures include digital health apps, health related wearables, artificial intelligence, home monitoring, patient held records and services, 'Internet of Health Things' and more. In addition to the 'new', there is also scope to grow and improve the 'existing', as some more traditional technologies are not yet universally rolled out or used and these should not be discontinued.

"However, while digital health innovations are increasing in scale and spread, at scale usage in most cases is still embryonic. Those vendors who will succeed will flourish but many will not, making investment riskier. The commercial decisions of the large US technology giants could have a significant bearing on the future of the digital health market."

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Notes to Editors

About LaingBuisson

LaingBuisson has been serving clients for over 30 years with market, policy and strategy insights, data and analysis across healthcare and social care. We are the chosen provider of independent sector healthcare market data to the UK Government's Office for National Statistics and work globally with providers, commissioners, payors, manufacturers, investors, regulators and advisors. We help our clients to understand their markets, make informed decisions and deliver better outcomes through market intelligence, consulting and data solutions.

For more information, please visit our website at www.laingbuisson.com.

About Martin Bell

Martin Bell is a former board CIO in the NHS and the former Deputy MD of a leading UK clinical systems vendor and has worked for almost 20 years in and around the UK healthcare sector. He now consults in IT and digital innovation in both the public and private sectors, NHS and supplier side to corporate healthcare IT vendors, investment houses, private equity and hedge funds, and to digital health start-ups. He spent the early years of his career in software development, defence, retail and construction.

About Digital Health UK Market Report, First Edition

LaingBuisson's Digital Health UK Market Report analyses primary, secondary, mental health, community and specialist care systems covering patient administration systems, electronic patient records, electronic prescribing and medicines administration, document management and much more. The report explores the latest technologies and new providers emerging to potentially disrupt existing supplier markets and models of care and move healthcare provision towards a 'Digital First' offering.