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How digital is changing the NHS landscape – take the leap or be left behind?

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Managing Partner, Co-
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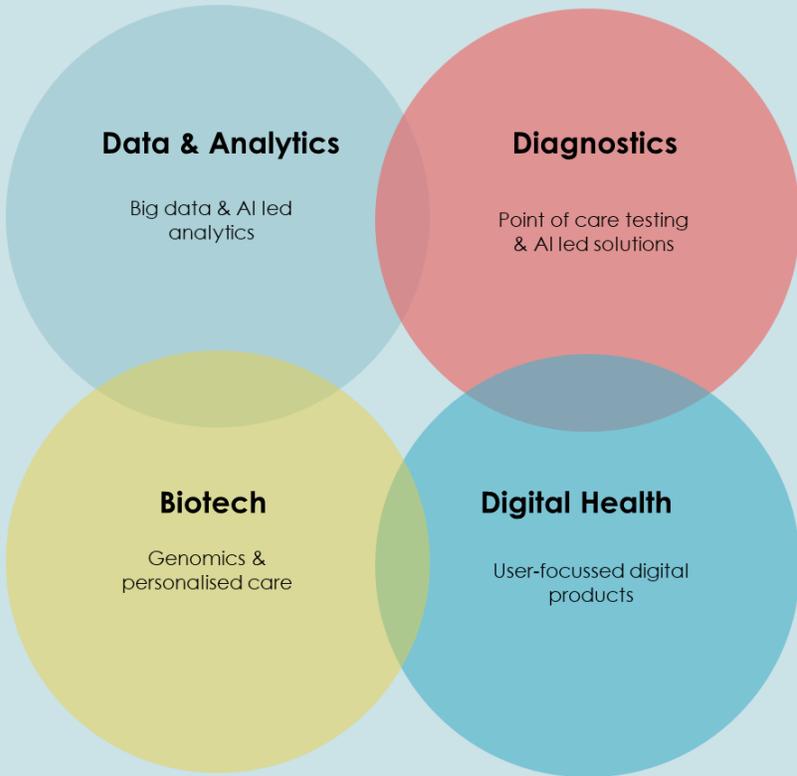
Dr Pooja Sikka
Partner, Co-Founder

TenX Health

Supporting the NHS to take the leap



We are targeting four health tech subsectors



International hubs of Health tech in 2018, with the US leading the way followed by hypergrowth in Europe and Asia



1 Femtech & Femcare

There is growing demand for digital platforms which support women's health.

Whether consumer-led or baked into clinical services (public & private), there is a greater demand for digital platforms connected to services, health professionals and diagnostics, that empower women around specific issues such as pregnancy, fertility, postnatal mental health and access to women's health diagnostics and services.

AI & Radiology

As healthcare demand grows and costs rise, the demand for diagnostic imaging also rises. But delivering a bigger specialist healthcare workforce to match demand is impossible.

The rise of scans being read and reported by machines is inevitable. The role of the human radiologist will change to support complexity. How quickly this will happen, and which company will be best placed to get to an accurate, safe and scalable tech solution in place, is the real question.

3 Point of Care Diagnostics

Point of care diagnostics exist, but the tech and scale is immature. Portable and scalable solutions for real-time diagnostics are needed.

Point of care diagnostics which help clinicians make often life saving decisions and improve diagnostic skill will prevent unnecessary delay, improve health outcomes and deliver better convenience to patients.

Blockchain enabled personalised healthcare

Empowering patients with their own cryptocurrency based personal budgets is a likely trend that will improve health and patient experience outcomes.

As consumerism grows and more patients want to be active in their healthcare choices, it is likely that over time patients will be given their own blockchain enabled budgets to plan part of the management of their care. Areas where we are likely to see this first is in mental health, back pain services and employer provided healthcare schemes.

5 Precision Medicine

Combining multiple health data sources with personalised information about patients such as genomes and preferences will lead to a new way of practising healthcare.

The aggregation of healthcare data into a single picture about a person is already happening. Over time, data will become richer, real-time and more consistent, allowing health systems and the way healthcare professionals deliver care to be more precise and better tailored to an individual's likely response to treatment.

High Street Healthcare

Patients want better access to healthcare and information, turning to tech and other services to optimise care alongside public healthcare provision.

With the rise of consumerism, healthcare services, especially those delivered through digital platforms which can be bought alongside NHS care, will become a mainstream choice for many people.

7 Digital therapies

Improving access to alternative therapies and psychotherapy through digital platforms is already happening but not at scale or integrated with the public health system.

The use of digital therapies is likely to become integrated into mainstream clinical services as well as patients accessing privately, where access to good quality psychotherapy, nutrition, child health and physiotherapy is important.

Employer-led healthcare

Corporate and other employers provide access to clinical services, delivered by novel health technologies and integrated with private health services, rather than just health insurance for their employees.

Employers have great buying power, and countless studies show the economic cost of ill health for the working age population both for the employer and the economy. Access to employer health programmes integrated with innovative health technologies is a likely future trend.

Emerging trends that will inform future pipeline

Healthcare Impact

Improved overall health outcomes

Due to innovation in areas such as AI & machine learning and the use of genomic data in administering precision medicine



Improved patient experience

Due to the ability to track & monitor health – such as medications – via intuitive mobile apps

Digital health records & big data

Have enabled easier sharing of health information and predictive analytics

Reduced pressure on the system

Through empowering patients to have greater control over their own health via digital means

Improved access via remote consultations

And remote diagnostic tools also mean that care can be provided outside of the hospital

Empowered healthcare workers

Better workforce planning and support will lead to better staff satisfaction and quality of care



Wider societal & economic impact

Reduced health inequalities

Reduced overall health inequalities lead to better education, employment opportunities and income

More efficient use of public spending

The £40b cost of health inequalities, through lost taxes and, welfare payments, can be redistributed

Fair employment and good work for all

More jobs created in the technology ecosystem ('flat white economy') and the stability of UK's 5th largest employer (NHS) secured

Increased gender equality

By investing sustainably and promoting female founders, gender equality in male-dominated industries (like tech) will improve

GDP growth

Healthy people work harder and better, and are generally happier, increasing economic productivity

Industry innovation

Promotion of UK's status as the leading European innovation economy

Decreased energy consumption

If more health services are delivered digitally, healthcare estates are used more efficiently



£14

ROI for every £1
invested into
healthcare



The 'ripple effect' of healthcare investment delivers more than just healthcare impact when investing has a sustainable mindset

Reducing health inequality builds a more sustainable future for society

For every £1 invested in public health, £14 will subsequently be returned to the wider health and social care economy, in terms of, not only better population health outcomes, but also wider societal benefits such as education, job prospects and earnings



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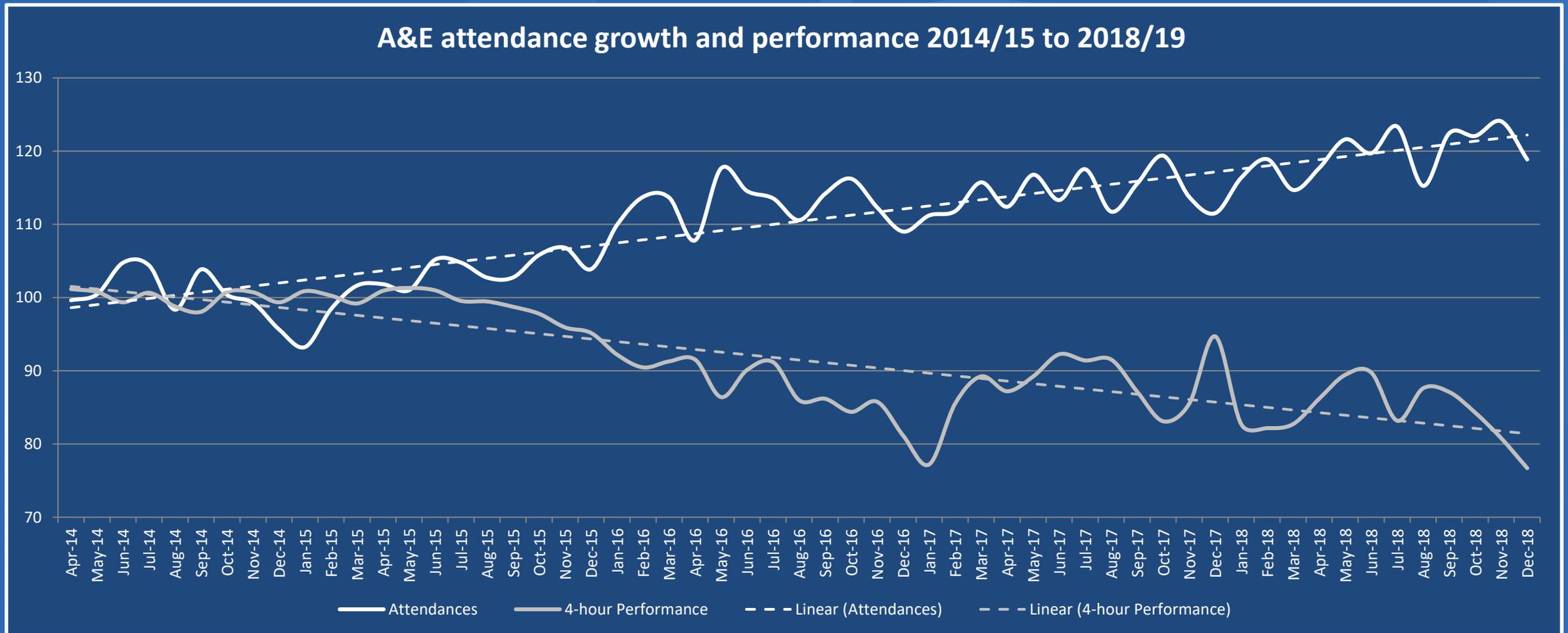
Lawrence Tallon, Director of Strategy, Planning and Performance, University Hospitals Birmingham NHS Foundation Trust

Digital first healthcare

Lawrence Tallon, Director of Strategy, UHB

National Association of Primary Care
10 October 2019

The demand 'problem'



UHB digital first programme



Alternative pathways for urgent, ambulatory care



Virtual consultations for urgent or outpatient care



Rapid triage to specialties, potentially bypassing A&E



Digital tools for long term condition management



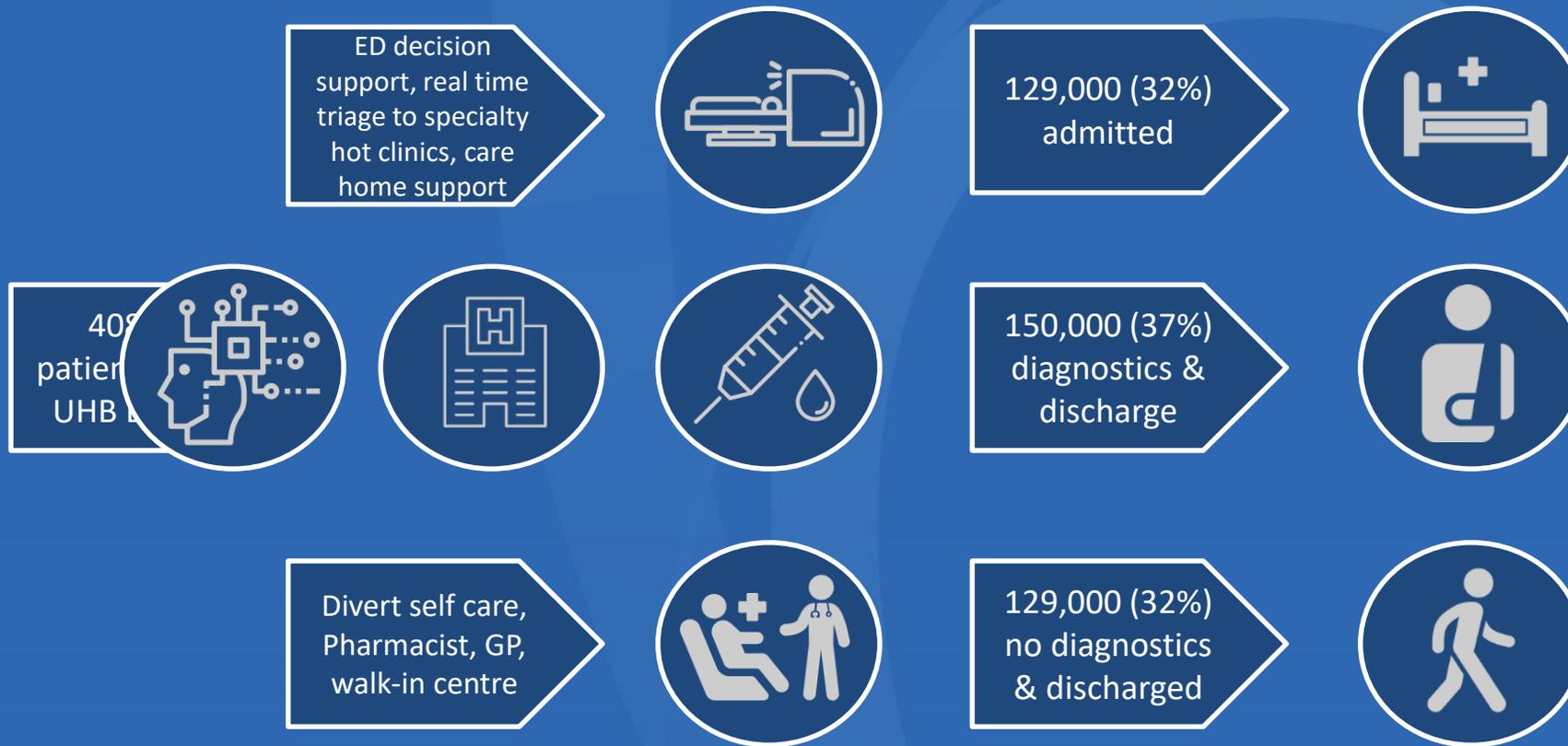
Projecting specialist medical expertise into care homes



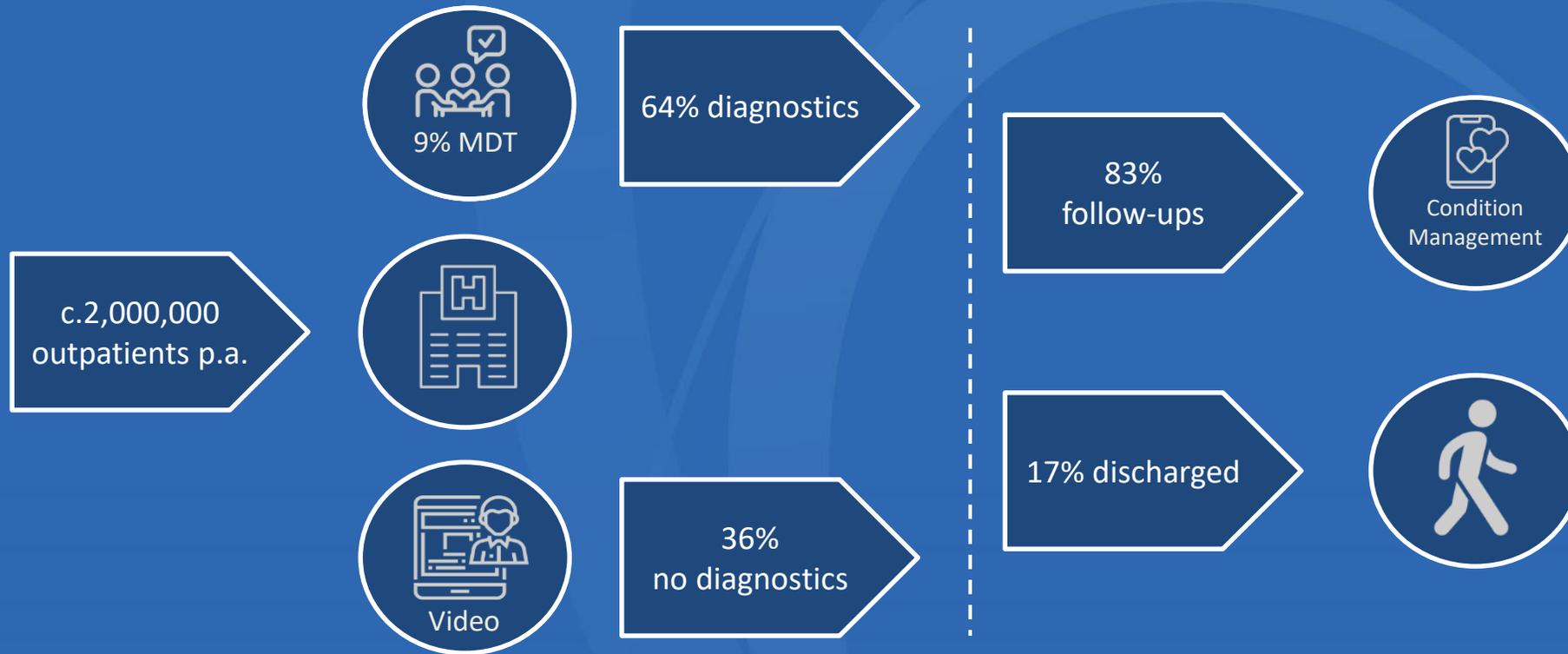
Tested with patients, meeting NHS core principles



Smarter pathways for urgent care



Smarter pathways for outpatients





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