

United Kingdom Digital Health - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 80 pages | Mordor Intelligence

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Report description:

The United Kingdom digital health market size is expected to grow from USD 13.05 billion in 2024 to USD 31.09 billion by 2029, at a CAGR of 18.96% during the forecast period.

The COVID-19 pandemic had a significant impact on the market in 2020, as hospital and clinic operations and visits were significantly reduced due to lockdown and social distancing measures implemented by the United Kingdom's government, in turn increasing demand, awareness and acceptance of digital healthcare services. For instance, in an article published in the British Medical Journal in May 2021, over 75% of patients consulted their general practitioner remotely during the pandemic using a computer or phone in the United Kingdom.

Moreover, mobile health solutions became a lifeline for consultation, primarily through smartphones and remote monitoring. Several companies entered the market to offer digital solutions for combating COVID-19-related illnesses and monitoring patients' health. For instance, in January 2021, biometric and identity management companies Mvine and iProov reported the trials of digital COVID-19 immunity passports. The digital passport enables a person's test results or vaccination status to be registered and proven on an app without disclosing their identity. Thus, the overall impact of the outbreak on the digital health market within the country is likely to remain positive over the forecast period.

In addition, the growth of IoT (Internet of Things) and technological innovations, rising preferences for mobile technology and the Internet, and rising demand for population health management are all propelling factors for the digital health market in the country. The growing public awareness of digital health and the rising level of acceptance among healthcare professionals, combined with evidence of the efficacy of using this technology, is expected to result in significant growth for this industry.

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For instance, as per NHS digital statistics in October 2021, nearly 28 million adults in the United Kingdom are registered with NHS login, the service supporting the NHS App 2021. Similarly, in November 2021, a medical start-up called Cera established 15 digital healthcare hubs across the United Kingdom to provide telehealth and medication services, equivalent to 1,000 care homes daily. Cera's technology helps older and more vulnerable people stay at home, lowering the risk of hospitalization and freeing up valuable bed space. Such establishments are driving the growth of the market.

Furthermore, the government's support in the form of grants and health tech investment is contributing to the market's long-term growth. For instance, in September 2022, Innovate UK, part of UK Research and Innovation, invested up to GBP 4 million (USD 83 million) in innovation projects in the creative technologies sector. This is across two strands of the competition. This competition aims to develop digital therapeutic extended reality (XR) solutions to provide mental health care services. These solutions may be applied and tested following a two-year R&D (research and development) cycle. They must have the potential to be adopted at scale to form part of the UK's formal mental healthcare ecosystem.

Additionally, in November 2021, the Digital Health Partnership Award was launched by the NHSX Innovation development team. This was created to assist NHS (National Health Service) organizations in England in bidding for funding to accelerate the adoption of digital health technologies to support patients with long-term conditions at home. The award brings together key players in digital health technology for the scaling process.

Thus, owing to the abovementioned factors, such as increasing usage of IoT and technological innovations, rising preferences for mobile technology, and the Internet coupled with government initiatives, the market is expected to project growth over the forecast period. However, security concerns regarding patient data will hinder the market's growth in the upcoming future.

United Kingdom Digital Health Market Trends

mHealth Segment is Expected to Hold a Significant Market Share Over the Forecast Period

The mHealth segment is expected to garner a significant market share over the analysis period. mHealth, or mobile health, is the use of mobile and wireless technologies to support the achievement of health objectives. The most common application of mHealth is the use of mobile devices to educate consumers about preventive healthcare services. Moreover, factors such as the rising burden of chronic diseases, technological advancements, rising public awareness about population health, and government initiatives will drive the market segment's growth.

The mHealth is also used for disease surveillance, treatment support, epidemic outbreak tracking, and chronic disease management. For instance, in November 2022, my mHealth and their NHS partners reported the national rollout of myAsthma Biologic, a digital therapeutic designed to support patients with severe asthma.

The rising government initiatives are expected to boost the segment's growth. For instance, in April 2021, my mHealth, a United Kingdom-based NHS-approved digital therapeutics company with three European collaborators, was awarded a Eurostars Grant worth EUR 2.5 million (USD 2.72 million) for the development of CUOREMA, their innovative program. The CUOREMA project of the Bournemouth-based start-up will focus on the development of a new, patient-centered, and intelligent cardiac rehabilitation support system.

Thus, all the aforementioned factors, such as government initiatives and partnerships, are expected to boost the segment's growth over the forecast period.

Tele-healthcare is Expected to Grow with Significant CAGR Over the Forecast Period

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Telehealthcare refers to a wide variety of technologies and facilities used to provide patient care and enhance the overall performance of the healthcare system. Telehealthcare services and systems have made the most progress in the remote management of post-acute care patients with chronic conditions. Telemedicine is the remote delivery of healthcare services, such as consultations over telecommunication or teleconference, and it allows healthcare professionals to evaluate, diagnose, and treat patients. Geriatrics telehealth to empower healthcare providers and improve the management of older veterans in rural communities.

The potential advantages have led to the increasing adoption of healthcare technologies, and players in this country are coming up with innovative launches to further increase telehealth adaptability. For instance, in March 2022, MedXHealth and Health Partners formed a strategic partnership to launch MedX's Teledermatology Screening Platform in the United Kingdom.

Rising healthcare spending and government financing for healthcare services are projected to fuel increasing technology adoption, propelling the market forward. For instance, in June 2022, the NHS (National Health Service) reformed its funding for digital healthcare, which is transforming health and social care through technological applications such as high-speed connectivity, digital skills, and cyber resilience. The NHS invested EUR 150 million (USD 163.06 million) in digital adoption and digitization funding. Digitalizing the health systems can provide clinicians with more timely access to accurate information and support changes to help improve health for all. Such instances may help boost healthcare technology adoption, thereby boosting the market's growth.

Thus, all the aforementioned factors, such as product launches and government funding, are expected to boost market growth over the forecast period.

United Kingdom Digital Health Industry Overview

The United Kingdom's digital health market is consolidated. In terms of market share, a few of the major players are currently dominating the market. The strategic initiatives taken by the market players such as acquisition, and collaboration among the market players and government are propelling the market growth. Some of the companies that are currently dominating the market are Allscripts Healthcare Solutions Inc., Athenahealth Inc., Cerner Corporation, AMD Global Telemedicine Inc., and McKesson Corporation.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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