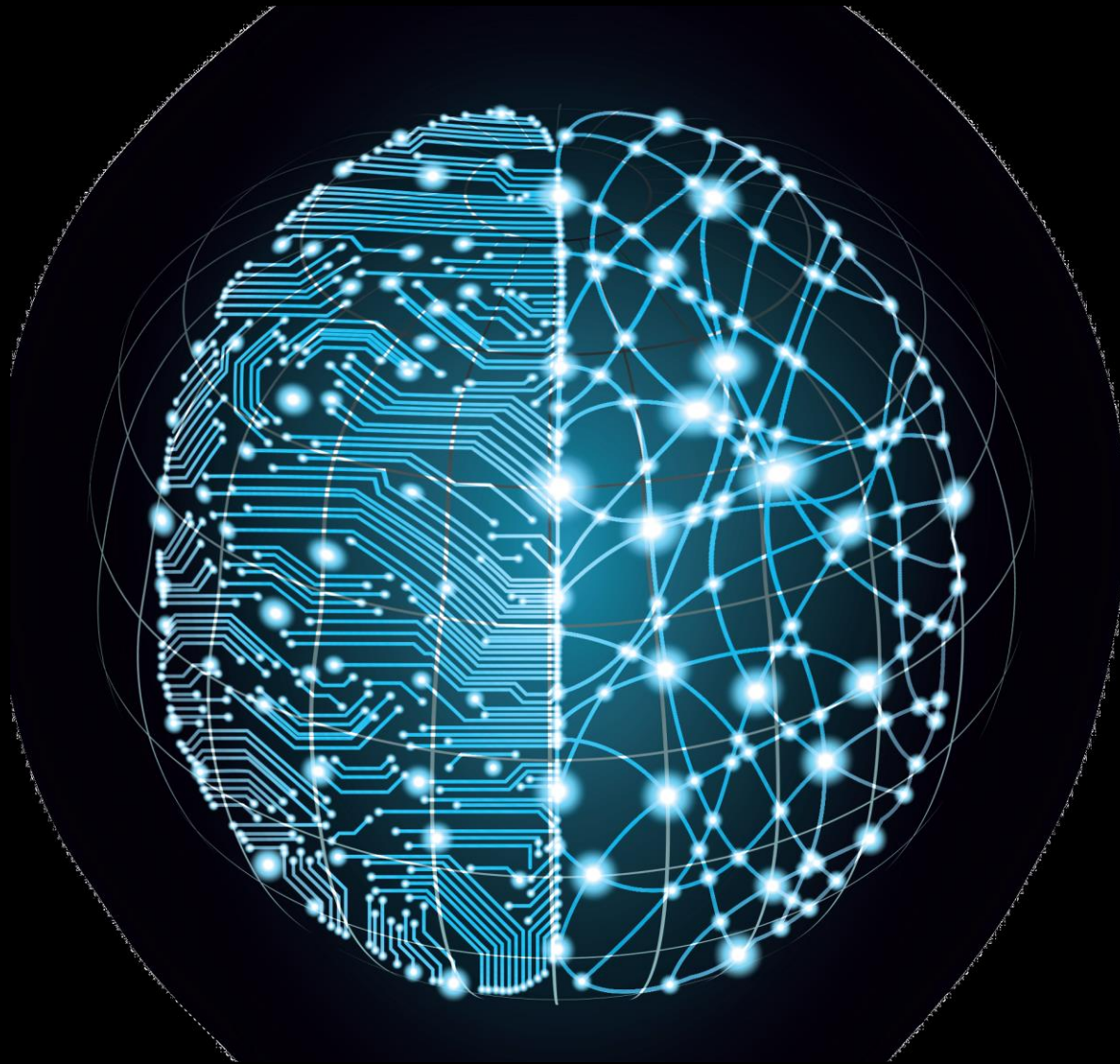


**Deloitte.**

Deloitte Centre *for*  
**Health Solutions**



**Shaping the digital of health care**  
Closing the digital gap.

## The SCOPE OF AND METHODOLOGY FOR THE REPORT

- Our research provides an assessment of the current challenges and opportunities for, and future potential of, digital healthcare across the UK; including identifying evidence-based good practice examples.
- Context the NHS Long Term Plan and need to adopt digital solutions at scale
- We identify the variation in the digital maturity of different healthcare providers across the UK and the numerous challenges including: IT infrastructure, staff skills and talent, patient engagement and data sharing.
- Our 2018 report, [Time to care: Securing a future for the hospital workforce in the UK](#) highlighted the importance of digital technology to bridge the gap between demand and supply.
- We surveyed 1,500 healthcare professionals working across primary, community and secondary care across the four UK countries.
- We interviewed 65 stakeholders, including policy makers, IT vendors, SMEs (technology solution providers), CCIOs, CIOs, academics, board level executives and patient advocacy groups.
- We obtained insights from Deloitte colleagues working on digital transformation projects in the UK and in other countries.

**We asked survey respondents what three words come to mind when thinking about the UK healthcare's journey towards digitalisation?**



# We asked survey respondents what are the top 3 challenges your organisation is currently facing in implementing digital technology?



## We also asked the interviewees what are top three challenges to achieve a digital healthcare system?

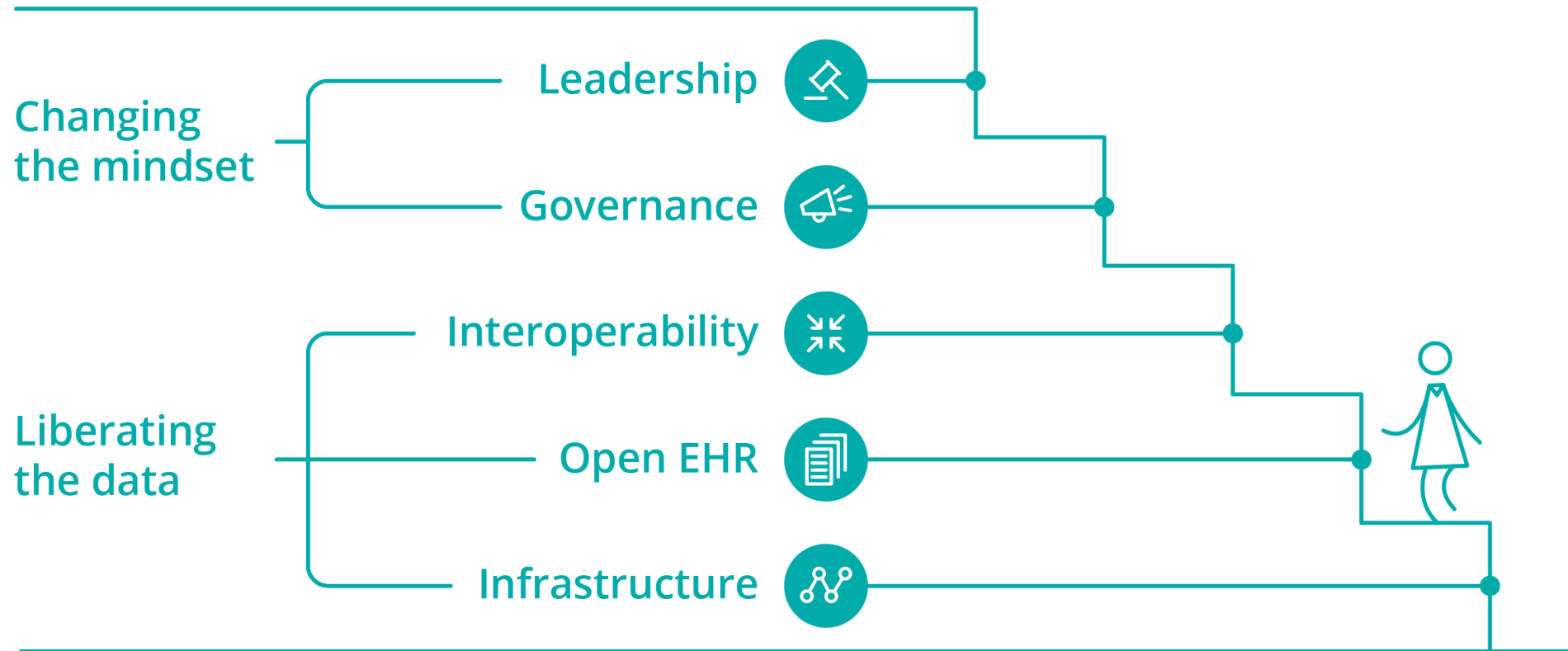
Funding	38%
Leadership	22%
Interoperability	20%

# We asked survey respondents what are the digital technology that they use the most?

	UK	England	Wales	Scotland	Northern Ireland
Electronic health record	91%	91%	78%	96%	100%
E-prescribing	61%	65%	32%	39%	19%
Point of care diagnostics	42%	43%	44%	28%	48%
E-rostering	41%	42%	41%	29%	23%
Patient apps	29%	29%	19%	30%	29%
Remote vital sign monitoring	25%	26%	20%	15%	23%
Telemedicine	17%	17%	9%	22%	16%
Voice recognition for clinical documentation	15%	15%	13%	16%	3%
Automation of clinical tasks	13%	13%	7%	9%	13%
Wearables	12%	12%	9%	12%	10%
Robotics	7%	7%	9%	4%	3%
Radio frequency Identification tags (RFID)	4%	4%	7%	5%	3%
Virtual reality	3%	3%	2%	3%	–
Artificial intelligence	3%	3%	–	2%	–

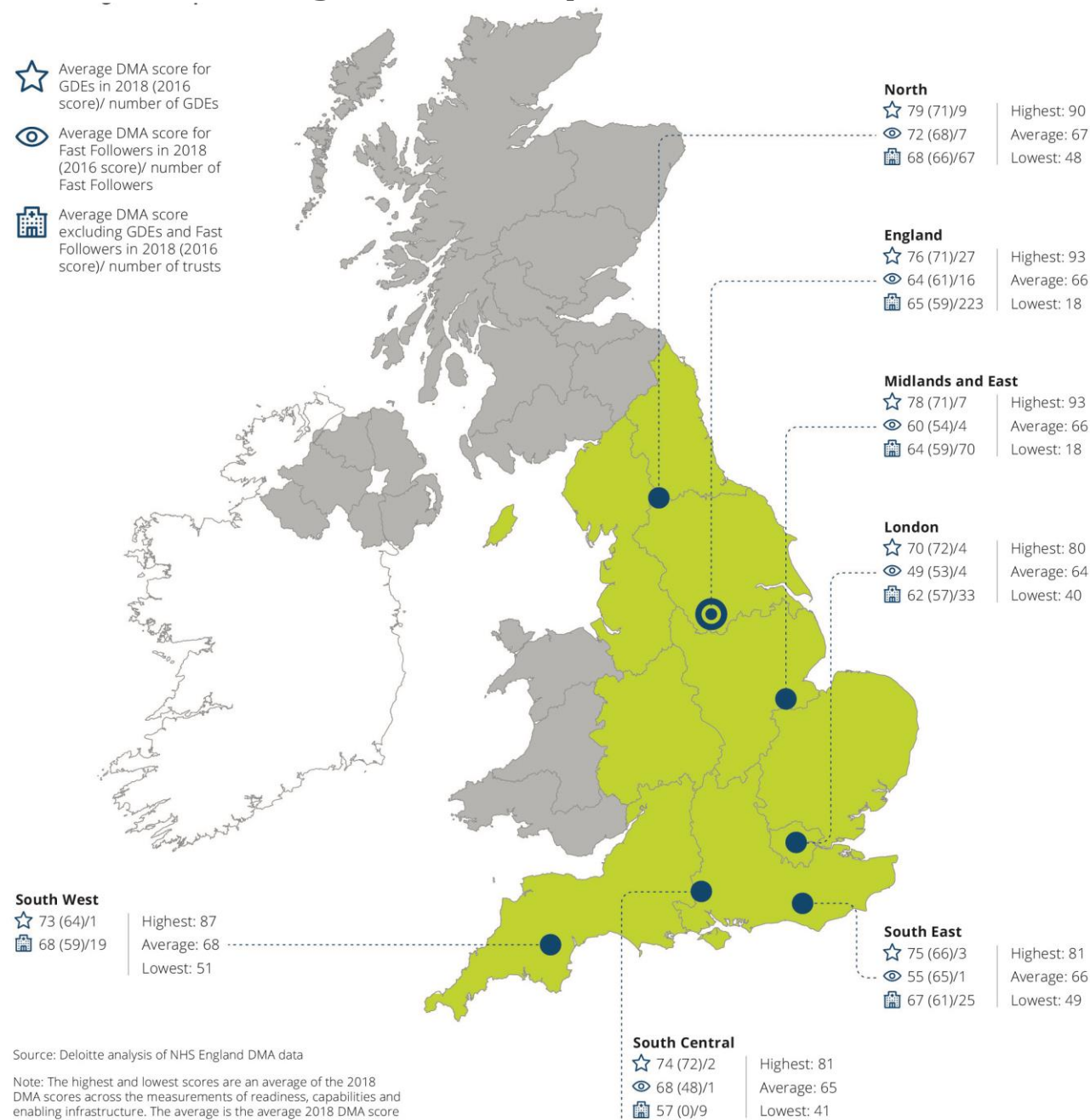
Source: Deloitte research and analysis based on survey commissioned from Sermo, 2019  
Interview question: “Which of the following digital technologies do you use to support care delivery?”  
Note: Data arranged by UK values from largest to smallest

## We have identified five key steps to close the digital gap





# Deloitte Analysis of 2016 and 2018 Digital Maturity Assessment



## The SMART characteristics of digital technologies that can help improve adoption at scale





**We asked survey respondents what three words would they hope to use to describe the state of UK digitalisation?**

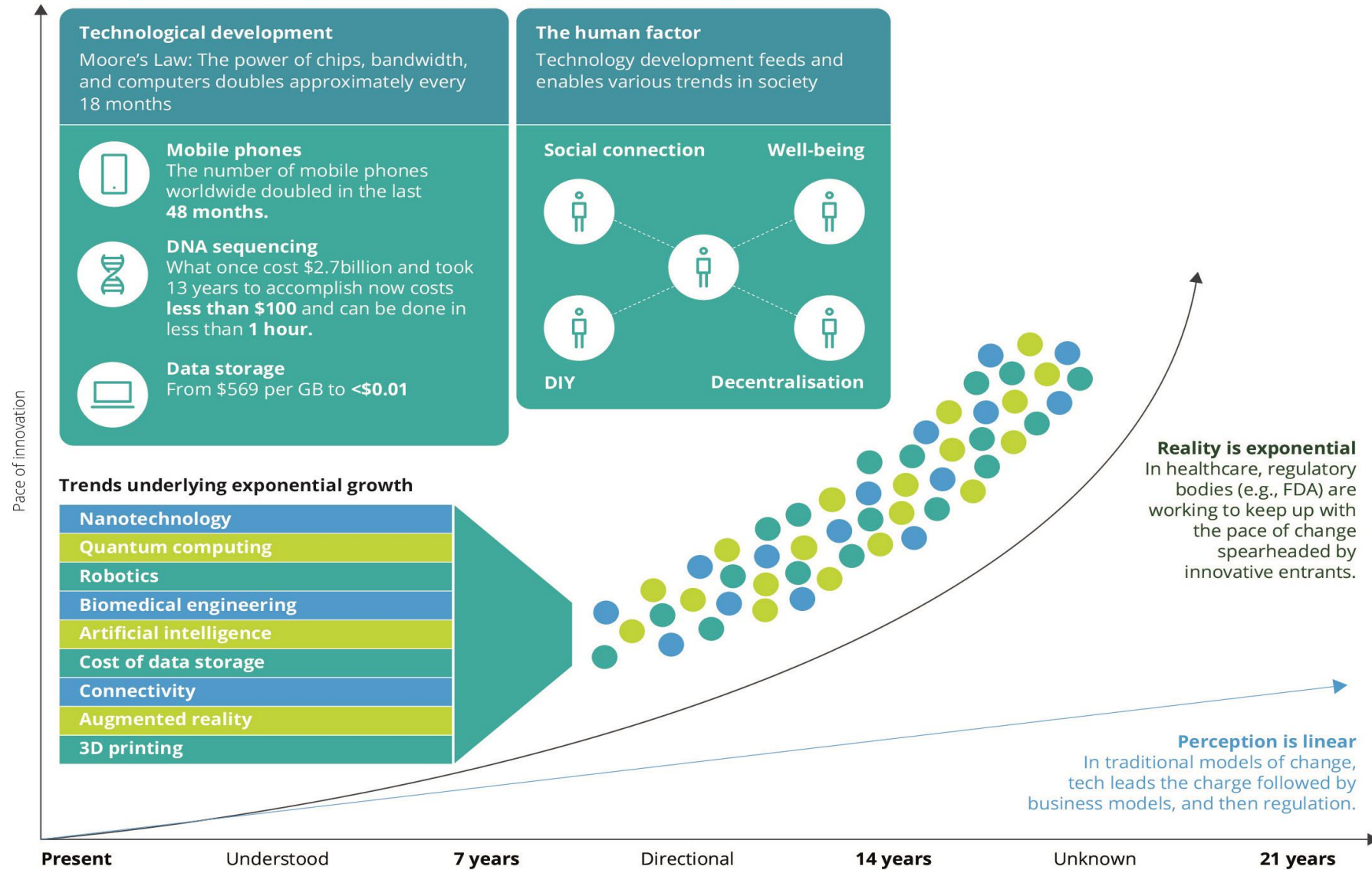


■ Negative sentiment ■ Positive sentiment ■ Neutral sentiment

Source: Deloitte research and analysis based on survey commissioned from Sermo, 2019  
Survey question: "In 5 years' time what three words would you hope to use to describe the state of digitisation within UK healthcare?"

Note: Figure is representative of the top 60 words used by participant. Colour key: Purple: Negative sentiment; Green: Positive sentiment; Grey: Neutral sentiment

## Exponential change that will accelerate the pace of disruption in healthcare



Note: All dollar amounts are given in US dollars.

Source: Deloitte analytics



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