

Operational review continued

Opportunity for growth

New services launched for community pharmacists, patients and in the healthcare analytics space.

EMIS Enterprise

The EMIS Enterprise segment comprises business areas where revenues are derived predominantly from B2B healthcare sector sources, including medicines management across both community and hospital pharmacy, the Patient business and the life sciences sector. It operates under the EMIS and Patient brands.

Market shares

The Group improved its market-leading position in community pharmacy during 2020 at 38% (2019: 36%) and its number two market position in hospital pharmacy with a market share of 36% (2019: 35%).

Supporting community pharmacies to play a greater role

The NHS Long Term Plan outlined the intention for a greater range of clinical services to be provided in a community pharmacy setting to alleviate pressure on primary care.

During 2020, EMIS launched Clinical Service Hub (CSH) in ProScript Connect, which enables customers to deliver and record services they provide under the Patient Group Direction (PGD) initiative. Patients are able to book these services via Patient Access.

CSH is the first cloud-based ProScript Connect module to be developed, offering the potential for further interoperability and additional services in future.

The pandemic changed the way community pharmacists delivered their services and EMIS successfully provided solutions to manage and deliver repeat prescriptions and offer digital consultations.

Patient: delivering digitally

During 2020, as a direct consequence of the pandemic, the UK public needed digital routes to healthcare more than ever before. This was reflected in increased usage of the healthcare services provided by the Patient Access app and website.

Registered users increased during the year to 11.7 million and subsequently to 12.0 million in February 2021 (2019: 8.4 million):

- booking 2.5 million digital or face-to-face GP appointments (2019: 6.7 million), a reduction from the previous year reflecting the lower numbers of GP appointments across the sector due to the pandemic;
- ordering 23.5 million repeat prescriptions (2019: 20.2 million); and
- booking 41,415 private pharmacy consultations and 15,356 pharmacy NHS flu vaccinations across web, iOS and Android (2019: 14,000 pharmacy consultations and 8,700 flu vaccinations).

Patient.info continues to be one of the UK's leading medical information sites, offering more than 6,000 patient-facing and professional articles including over 100 about Covid-19. Eighty million unique users viewed 166 million pages during 2020 (2019: 42 million users, 109 million page views).

480m items are dispensed annually by our community pharmacy customers

The increase in usage of both the website and the existing Patient Access services provides a platform for growth of future Patient Access offerings, as the NHS increasingly looks to provide the UK public with a digital front door to healthcare services.

Patient Access will be launching its new Smart Pharmacy service during 2021, which will enable patients to order, track, and opt for home delivery of their medications from their local pharmacy. It offers community pharmacies a strong proposition in the face of increasing online competition as Smart Pharmacy will provide patients with regular updates on the progress of their prescription, taking pressure from the front desk of busy GP practices.

Another new service successfully launched recently has been a Patient and Pinnacle co-developed solution for community pharmacists to provide minor ailment treatments under the Public Health England Community Pharmacy Consultation Service (CPCS) framework. A new signposting feature in EMIS Web, called Patient Access Connect, allows clinicians and surgery staff to directly refer patients to their local pharmacy.

More information on how Patient's services are aligned with the NHS's aim to create a digital front door can be found in the markets section on pages 16 and 17.

The partner programme: a powerful ecosystem

The partner programme continued to perform strongly in 2020 with the number of partners offering products that interoperate with EMIS clinical systems increasing to 143 (2019:113). The Group continues its approach of partnering with best of breed technology to provide solutions to its customers. No single business can offer everything in a market as complex and varied as healthcare, but together EMIS's ecosystem can solve problems for customers in a better and faster way. EMIS already offers a strong proposition through EMIS Web and in future the business will develop even more integration through EMIS-X.

With the increased focus on the digitisation of healthcare, the EMIS partner programme has been strengthened during 2020 with the addition of companies such as Arc Health, providing technology to enable video consultation in care homes.

EMIS-X Analytics opportunities in enterprise markets

In 2020, Explorer and Visualiser, the first products from the EMIS-X Analytics suite, were launched to the market. EMIS-X Analytics is a high performance cloud analytics suite that provides a range of powerful processing tools designed to curate, aggregate and query large healthcare data sets at speed and scale. It offers significant potential for EMIS Group to grow the business over time with opportunities in both the NHS and life sciences.

EMIS-X Analytics has been used to facilitate a number of national and regional Covid-19 research programmes, such as NHS England's OpenSAFELY programme, a collaboration between the University of Oxford, the London School of Tropical Hygiene and Medicine and system suppliers. Led by NHS doctors Ben Goldacre and Liam Smeeth, OpenSAFELY is a new secure analytics platform for electronic health records in the NHS, created to deliver urgent results during the pandemic.

Industry insights



Supporting public health

Dr Sarah Jarvis, MBE, FRCGP
Clinical Director, Patient Platform Limited

Dr Sarah Jarvis is a GP, Clinical Director at Patient.info and a regular contributor to health discussions in the media. She combines her unique perspective and knowledge to provide clinical guidance to Patient and the wider EMIS business, making sure Patient content and services are what the public needs.

"It's so important to me that the general public gets accurate and reliable health information. It helps people take control of their health and make informed decisions, leading to better outcomes.

"I try and bring all my external experience to Patient to feed into Patient.info. Since the pandemic began I've given more than 800 media interviews, mainly about Covid-19. It's armed me with a very clear picture on what the public wants to know. We have developed a dedicated coronavirus information hub at Patient and by sharing my insights with the Patient team, we have been able to ensure we're answering all the questions the public are most interested in. There are more than 100 editorials on every aspect of the pandemic.

"I provide clinical insight on the new services we've developed to help Patient Access provide a digital front door to GP and pharmacy services. I have a weekly briefing with the Deputy Chief Medical Officer for England, and along with information from gov.uk and the Office of National Statistics, I make sure I'm providing the latest information and guidance.

"All Patient Access services follow strict governance processes and are in line with NHS guidance. I've also been keeping my colleagues at EMIS up to speed on all the latest information on Covid-19 as it evolves with regular Q&A sessions. In short, alongside the rest of the EMIS clinical team, we do everything we can to support patient care for the nation."