

# Mindset XR Programme: 2022 – 2027

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## Healthy Lives Aim

“Helping people to live well throughout  
the life course in mind and body.”

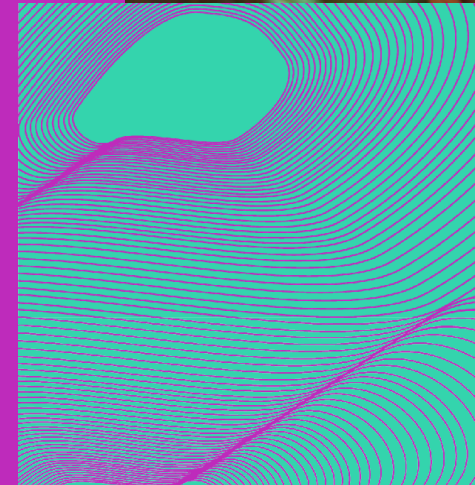


Image: Freepik

Healthy Lives



# Scene Setting

- Aim
- Approach

## Mindset: Tackling a key societal issue

- Inspired by XRHA paper 'Growing value of XR in healthcare'

Key Findings from NHS England Survey, 23/24:

- **1 in 5** (20.2%) adults (over 11.5 million) in England had a Common Mental Health Condition (CMHC)
- **Young people** were more likely to have an CMHC than older adults with prevalence in 16 – 24 yr olds rising to 25.8%
- Prevalence of **severe MHCs** has also increased by 11.6%
- Prevalence of CMHCs is **higher in the most deprived areas** (26.2%) than in the least (16.0%)
- Yet only **44.6%** adults are receiving treatment\*
- Increasing demand + not enough clinicians = digital opportunity

\* Adult Psychiatric Morbidity Survey: Survey of Mental Health and Wellbeing, England, 2023/4

### UK-WIDE ISSUE

Nation	Prevalence (Adults, %)	Treatment Rate (% of those with condition)
England	20.2% (16–64, 2023/24)	43.5% receiving treatment (2023/24)
Northern Ireland	18–26% likely affected	40% of diagnosed cases received treatment
Scotland	11.3% (long-term condition, 2022)	Approx. 20% on antidepressants
Wales	~16.7% current; ~25% lifetime	No specific rate available

### KEY OUT-TAKE

20 – 25% UK population have a MHC and not even half of them are being treated

# Addressing with a holistic approach

Overall Programme Budget £20m

Delivered 3 Workstreams, 2022 – 2027:

1. Grant funding for **Collaborative R&D** projects, inspiring partnerships between academia and industry
2. **Investment Partnerships** to boost government funding and stimulate future investment
3. Partnering with Health Innovation Network, South London to deliver the **Mindset XR - Innovation Support Programme** (MISP), to optimise results by stimulating:
  - Knowledge sharing (**expertise**)
  - Networking and collaboration (**partnerships**)
  - Adoption and scale (**connections**)
  - *Supports both projects and the wider ecosystem to deliver maximum economic and social impact*

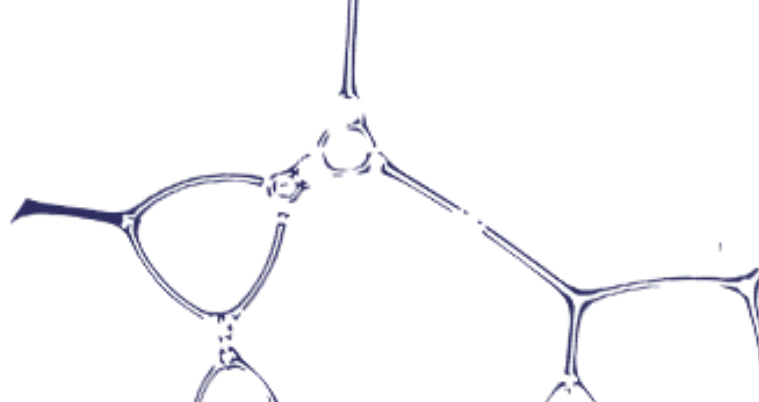
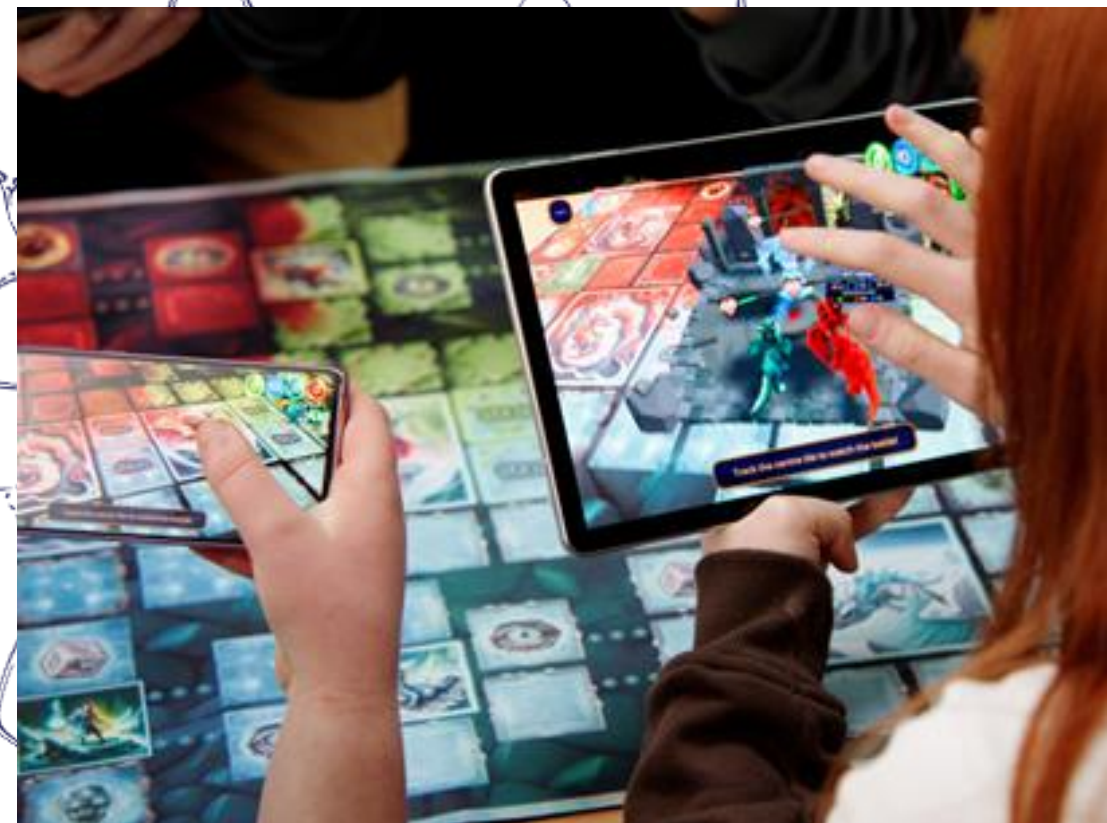


Image: Play Well For Life





Healthy Lives

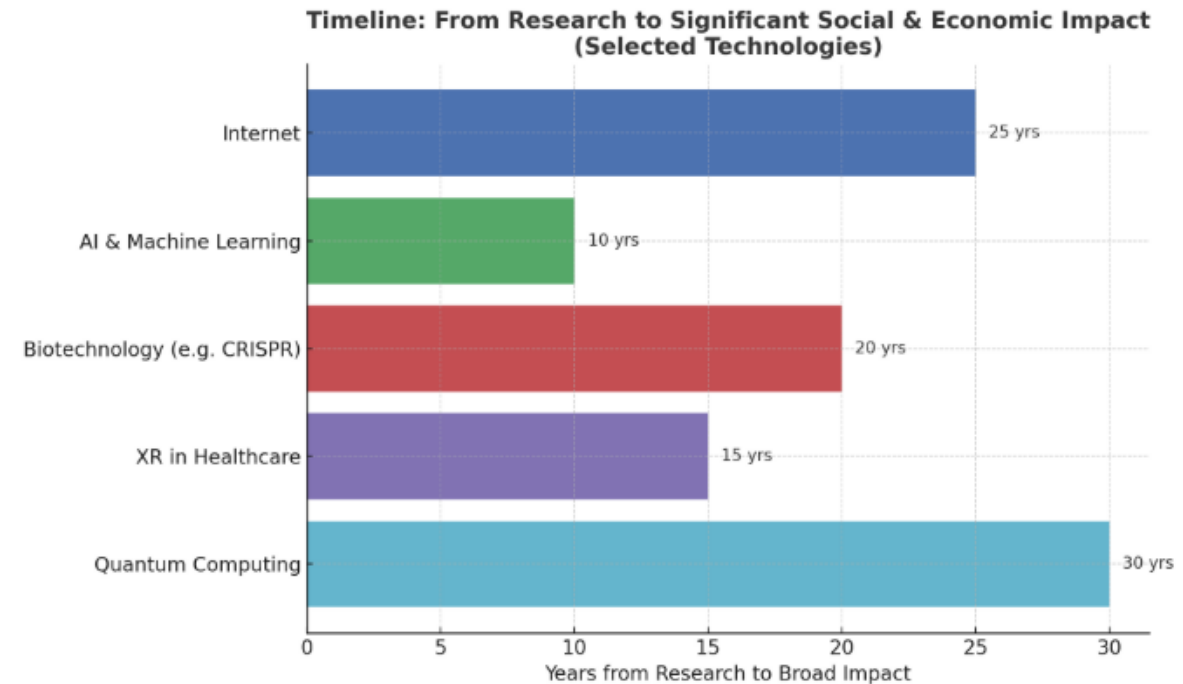


# Delivering Impact

- Impact Timeframe
- Mindset
- Projects

# Timeframe: From research to impact

- Many studies conducted
  - 10 – 20 years for broad tech impact
1. Griliches (1957, 1992)
    - Showed that new technologies often take **decades** before reaching widespread economic impact.
  2. Comin & Hobijn (2004, 2010)
    - Highlight that major technologies (electricity, telephone, computers) take **10–30 years** from invention to broad adoption across economies.
  3. OECD and World Bank reports
    - Emphasise that R&D and innovation investments typically take **10–20 years** before showing clear economy-wide benefits.



## KEY OUT-TAKE

Takes 15 years for XR to deliver broad impact in healthcare, but 'we' are already seeing this!

## 3 Years in, Mindset impact so far...

- Funded & supported 70+ UK wide SME led projects, including final cohort of 17)
  - **30** Feasibility
  - **40** Industrial Research
  - **4** Investment Partnerships
  - **80%** projects address low social economic groups
- Stimulated ecosystem, growing no. of applicants
  - £3m MR1 – 2022/23: **46**
  - £3.2m MR2 – 2023/24: **103**
  - £3.6m MR3 – 2024/25: **136 (196% inc. over 3 years)**
  - £1.8m Investment Partnerships: **150%** inc. across 3 comps
- Innovation progressed from treating **wellbeing to SMIs**
- Over **63** additional jobs created across **32** project reporting
- **£2.1m** private and further funding raised by **13** projects reporting
- High performance MISP achieving **NPS 9 and so much more!**

The image shows the cover of a report titled 'Innovation Caucus'. The background is a dark blue gradient with a faint image of a person. The text is white and pink. The title 'Innovation Caucus' is at the top. Below it, 'INNOVATE UK GRANTS AND R&D RETURNS: IMPACT ON BUSINESS AND ECONOMY' is written in white. A large pink line of text reads 'ROI - £6.21 of value-added for every £1 Innovate UK invests'. At the bottom right, the Oxford Brookes University logo is visible in a green box.

Innovation  
Caucus

INNOVATE UK GRANTS  
AND R&D RETURNS:

IMPACT ON BUSINESS AND ECONOMY

**ROI - £6.21 of value-added for  
every £1 Innovate UK invests**

OXFORD  
**BROOKES**  
UNIVERSITY

## Projects are Already Delivering Impact!

- **TendVR: Researching, designing and delivering VR-based mindfulness based cognitive therapy (VR MBCT) to Mind service users across the UK**

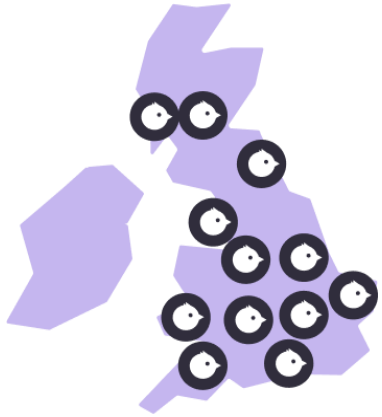
Key stats:

- First VR-MBCT course to be **deployed in the NHS – just three years** after their first study
- **2-5 times cheaper** than Cognitive Behavioural Therapy
- On demand treatment with **no waiting list**
- **EFFECTIVE >50% average reduction** in PHQ-9 (depression) and GAD-7 (anxiety) vs. 43% (classic ‘gold standard’ CBT) <sup>1</sup>
- **ENGAGING >80%** treatment completion rates (vs. 68.2% classic CBT) <sup>2</sup>
- **59% reliable recovery** from mental health conditions in latest delivery (NHS target = 48%) moving from clinical to non-clinical level of treatment
- **MR3 award**, focussing on Treatment Resistant Depression



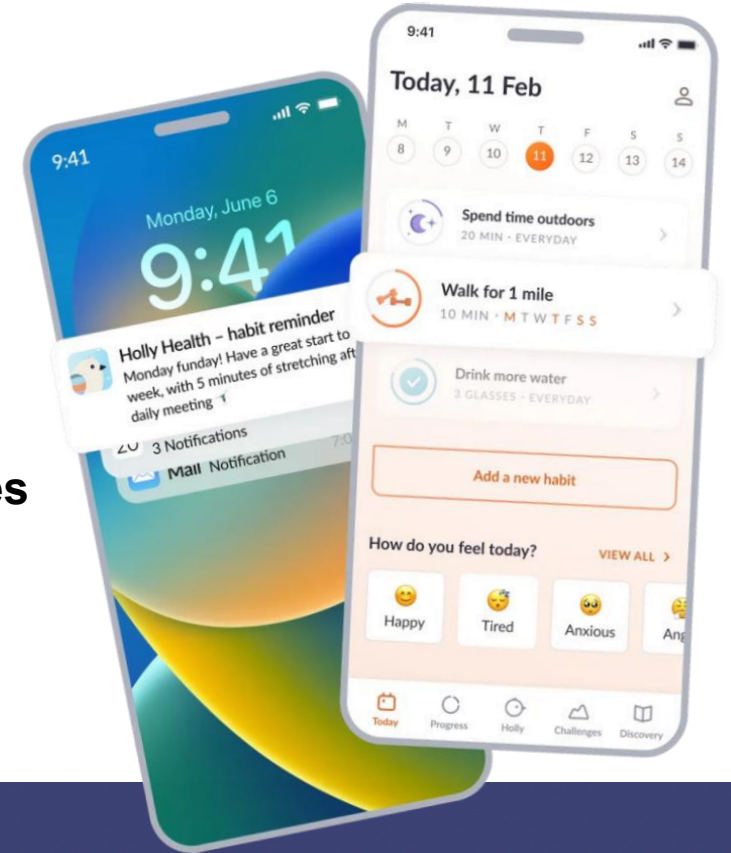
Image: TendVR





## Wellbeing coaching, with compassion & intelligence

- Their digital service **supports sustainable mental & physical health habit changes** for a wide range of lifestyle risk factors and long-term conditions like **anxiety**, after extensive co-design with the public & clinicians
- Deployments have taken place with **200+ GP practices across over 18 UK regions**
- Holly Health has delivered personalised digital health & habit coaching to **70,000 UK patients**



### Observed outcomes in primary care:

**30%**  
reduction in GP  
Appointments  
*(in high service users)*

**28%**  
improvement in  
ONS-4 Wellbeing  
*(in people with low to  
medium wellbeing)*

**31%**  
increase in  
Exercise Hours  
*(in people with low to  
medium exercise)*

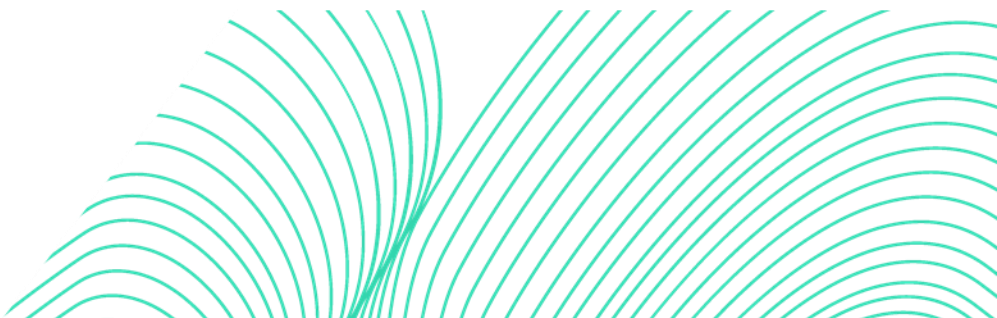
**3.55mmHg**  
Average BP  
reduction  
*(in people tracking  
BP)*

**>15x ROI**  
Estimated ROI  
in ICS scale  
deployments

## And last but most definitely not least...

### XR Therapeutics: New VR platform for accessible treatment of phobias and anxiety, self-harm & PTSD

- **7 NHS** trusts (took one and a half years to win first contract)
  - 2 charities
  - Multiple private insurance providers
  - Various services including adult and children mental health teams working in:
    - Prison and probation services
    - Education and CYP services
    - Neurodiversity and learning disabilities
    - Procedural and hospital settings
- The **first XR company to be commissioned by an ICB** and be included on the NHS Innovation Accelerator
- Health economics report shows savings of up to **£21,000 per 100 patients treated**, plus **7 QLYs** (quality-adjusted life years)
- **Featured in the NHS Long Term Plan** for their work with Greater Manchester Mental Health Foundation Trust



“It was fantastic, extremely useful for the patient, they progressed so quickly in 2 sessions. I have a patient scared of heights, he went into the session with all those typical physical symptoms associated with anxiety and **what we did in 2 sessions here with XRT would probably have taken around 12 without.**”

- Laura, NHS Therapist

“XRT has changed my perception of how I view all my fears and anxieties and not just the specific phobia I have. **I was blown away by the process of the treatment and how quickly it worked for me.**”

– Patient, XR Therapeutics

Healthy Lives



# Future Funding

- Context
- Shape
- Optimising Impact

# How things are shaping up

Top-level UK strategy supports more investment in DTX for MH:

## Government

- Economic growth central to Industrial Strategy, with Digital & Tech and Life Sciences being two of the 8 key UK growth sectors
- Health mission focus is on CYP mental health

## NHS 10 Year Plan

- Analogue to Digital
- Hospital to Community
- Sickness to Prevention

## Life Sciences Plan

- Enabling World Class R&D
- Driving Health Innovation and NHS Reform
- Making the UK an Outstanding Place in Which to Start, Grow, Scale, and Invest

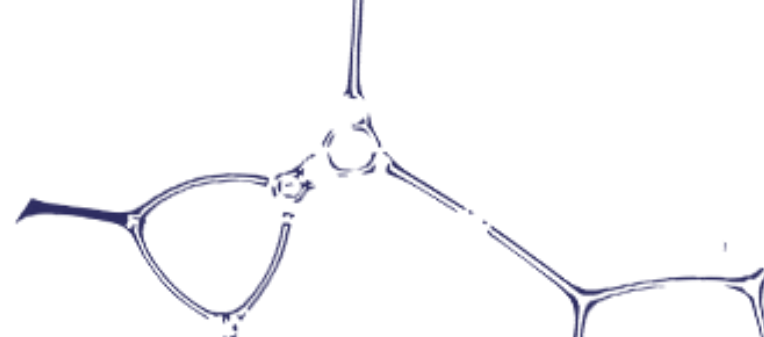


Image: CrossSense Trial Participant





# Catalysing innovation in mental health

Current thinking developed in Aug 24, will need to be reviewed and aligned where necessary to new strategy and SR priorities

- New 4yr programme with comps launching in **2027**
- Focus will be on DTx for mental health across the life course utilising creative tech + AI (if applicable & appropriate)
- Thematic areas: **Prevention**, Diagnosis, **Treatment**
- CR&D multi-strand comps:
  - Feasibility (TR 1 – 3)
  - Industrial research (TR 4 – 6)
  - Experimental design (up to TR 7, 8)
- Investment Partnerships comps, feasibility, industrial research, experimental design
- Contracts for Innovation (SBRI), industrial research (closer to market/impact)



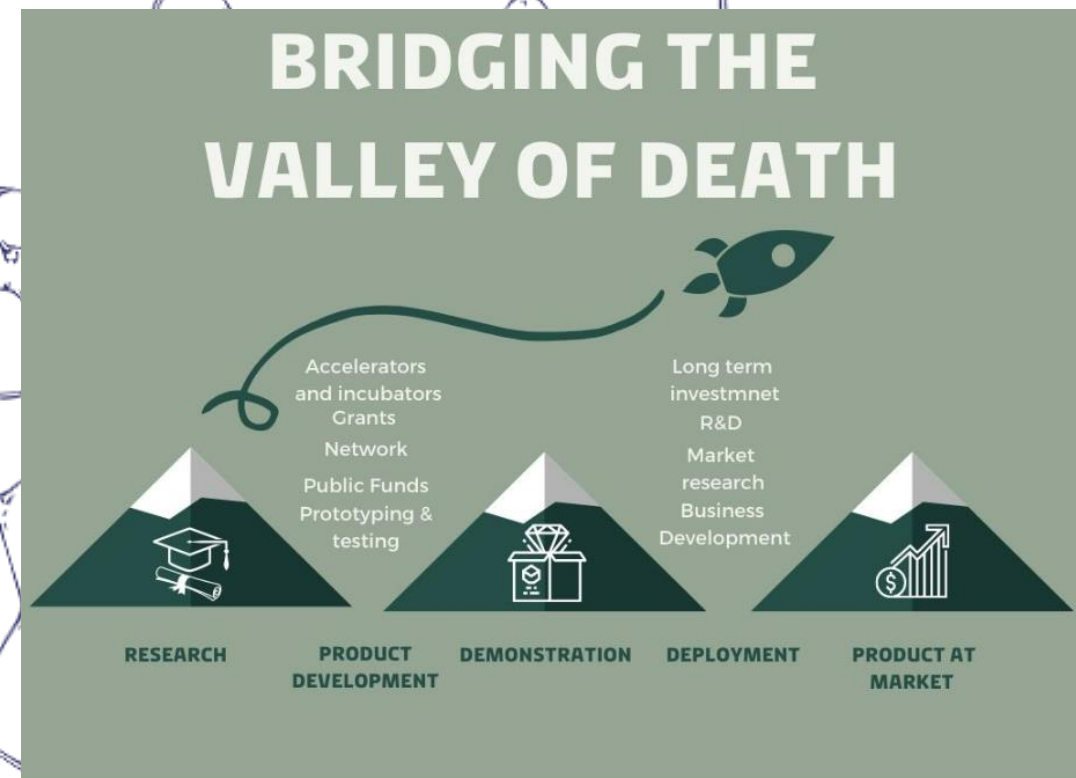
Image: MindTrack 360  
(Formerly, Life Process Program)

# Optimising economic & social impact

A community approach, drawing on ecosystem expertise

- Looking at a UKRI **cross-council partnership** to run a comp focussed on behavioural and culture barriers to determine what's needed for **behavioural change** - to increase market adoption and stickiness
- Providing a **support programme** to help optimise project delivery and opportunities to drive adoption and scale (e.g., MISP)
- Partnering with an accelerator to help projects with the most potential to bridge the second valley of death

**AMBITIOUS CO-DESIGNED PLAN, DEPENDENT  
ON STRATEGIC AND SPENDING REVIEW  
PRIORITIES + BUDGET ALLOCATIONS...  
still an opportunity to shape – let's talk!**







Innovate  
UK

# Thank You

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