

HealthCast: The customisation of diagnosis, care and cure



HealthCast is the firm's premier thought leadership series

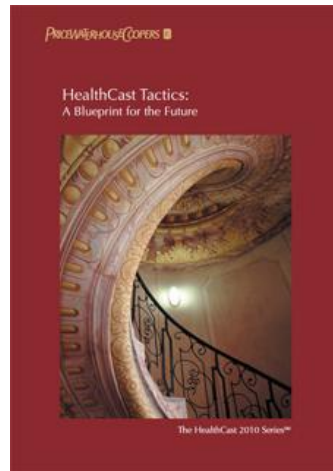


HealthCast
2010: Smaller
World, Bigger
Expectations

1999

HealthCast
Tactics:
A Blueprint for
the Future

2002

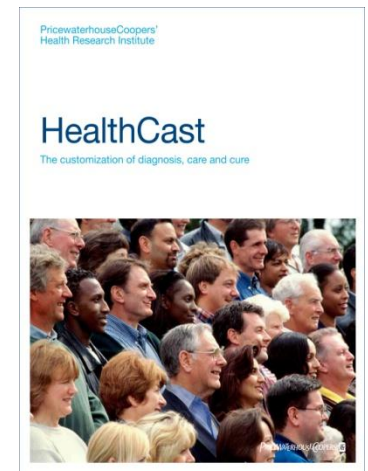


HealthCast
2020: Creating a
Sustainable
Future

2005

HealthCast:
The
Customisation
of Diagnosis,
Care and Cure

2010



About the research

- **225** in-depth interviews with top executives in government, hospital systems, insurance companies, clinician groups, pharma and life science companies and technology firms in **50** countries
- Survey of **3,500** consumers in the UK, Germany, the Netherlands, Norway, the US, Canada, and Australia
- Survey of **590** health leaders in the UK, Germany, the Netherlands, the US, Canada, South Africa, Australia, New Zealand, Argentina, Brazil, China and India, central Europe, Scandinavia, the Middle East and Asia

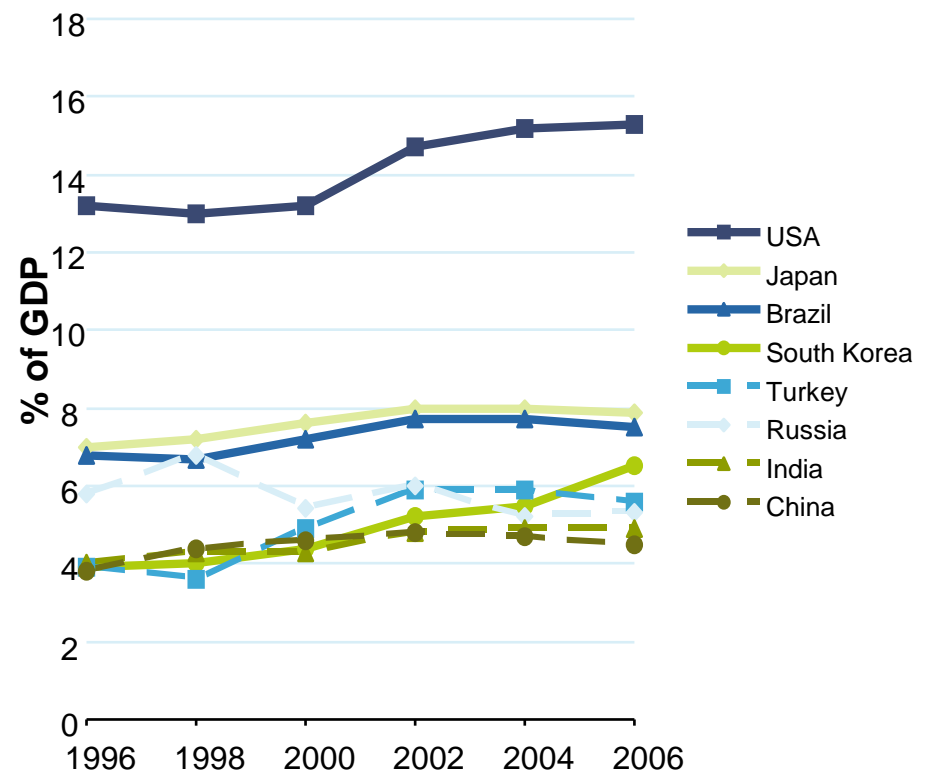
The link between customisation and chronic disease: Why this matters to you

Consumerism: Consumer-driven standards on quality, quantity, cost and experience are re-shaping how health services are delivered

Chronic disease: Both young and old consumers are developing chronic diseases in record numbers, leading to an explosive consumption of resources that is driving up spending and creating liabilities for future generations

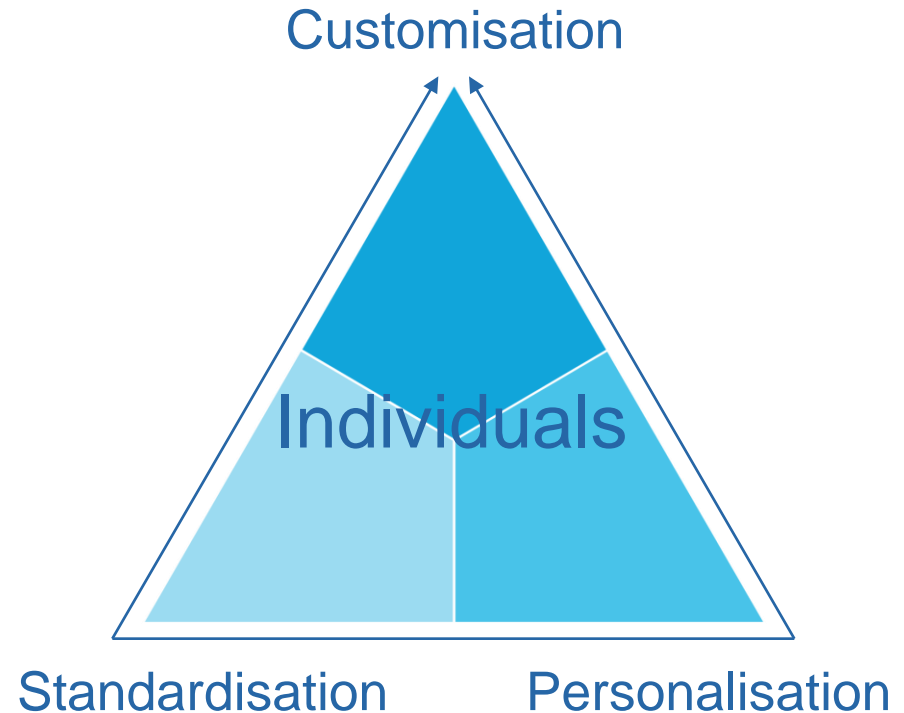
Converging influences in health: Chronic disease is associated with social, cultural, economic, genetic and behavioral factors which are largely outside the current health system's scope of influence

Total Expenditure on Health as a % of GDP, 1996-2006



What do we mean by customisation?

- Customisation is about helping individuals get the right care at the right time and place for the right price
- It involves individuals in the co-design and refinements of the health service
- It can optimise quantity, quality and cost of care



Six pressure points affecting health systems around the world

Regulatory reform that focuses on efficiency and effectiveness

Funding that is redistributed

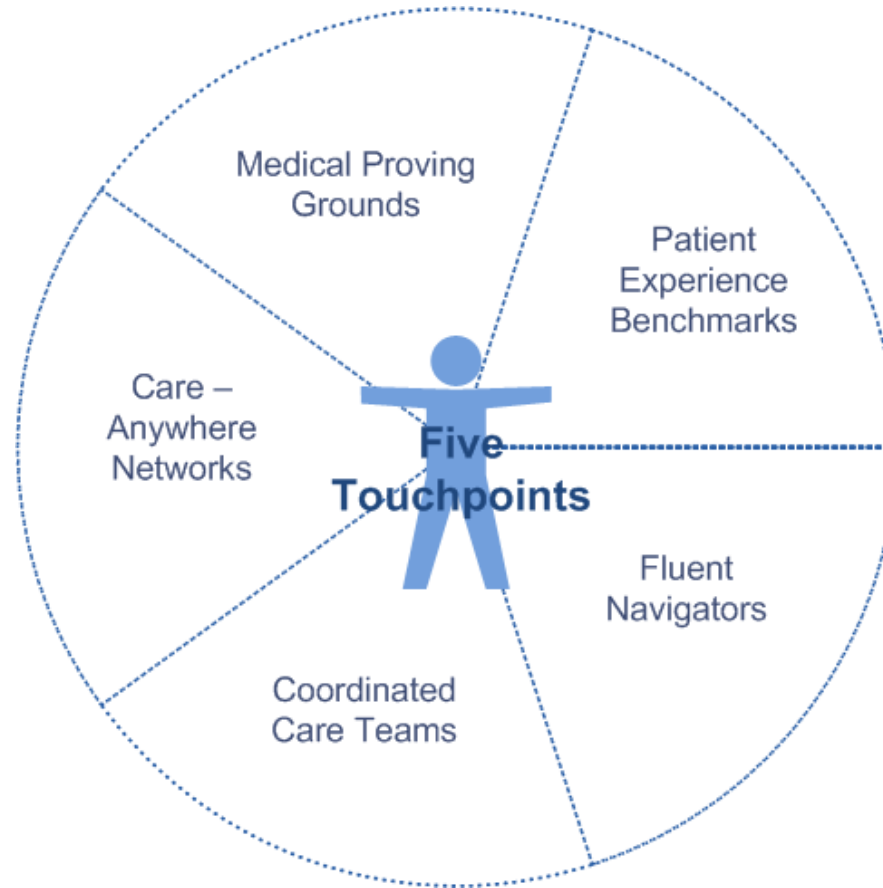
Incentives that encourage partnership

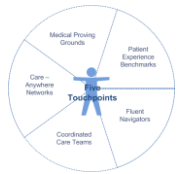
EMRs and IT that ease collaboration and customisation

Patient communication that supports shared decision-making

Workforce models that are flexible

Five touch points are being used to redefine and reshape an individuals role in their care

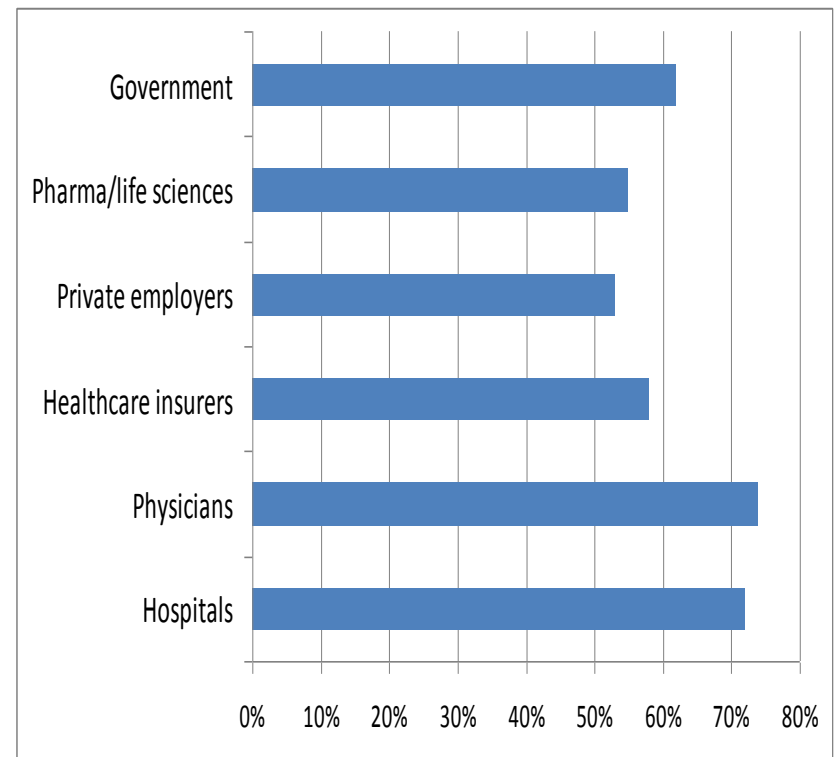




1. Coordinated care teams

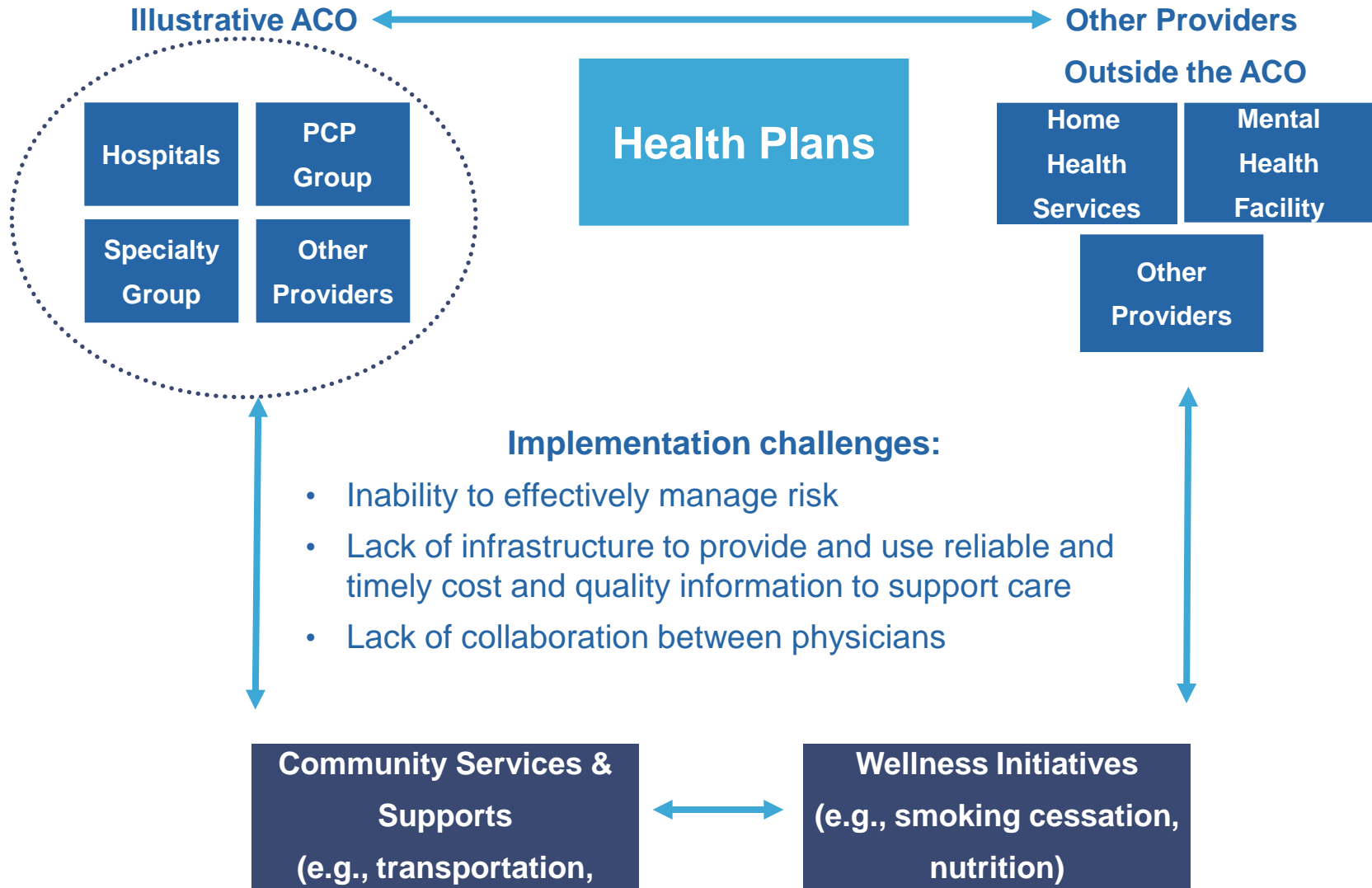
- Approximately 40% of global health leaders surveyed said care hand-offs were difficult
- Two-thirds of global consumers surveyed said a coordinated team of clinicians was important to them
- Payment and regulatory silos create misaligned incentives and discourage coordination and partnership
- Poor IT infrastructure prohibits information sharing

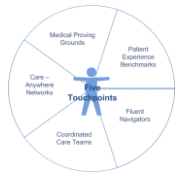
Is your health system adopting coordinated care across practice settings to enable customised care?



Source: PwC Health Research Institute Global Health Leaders Survey

How US accountable care organisations (ACOs) propose an integrated payment and delivery method





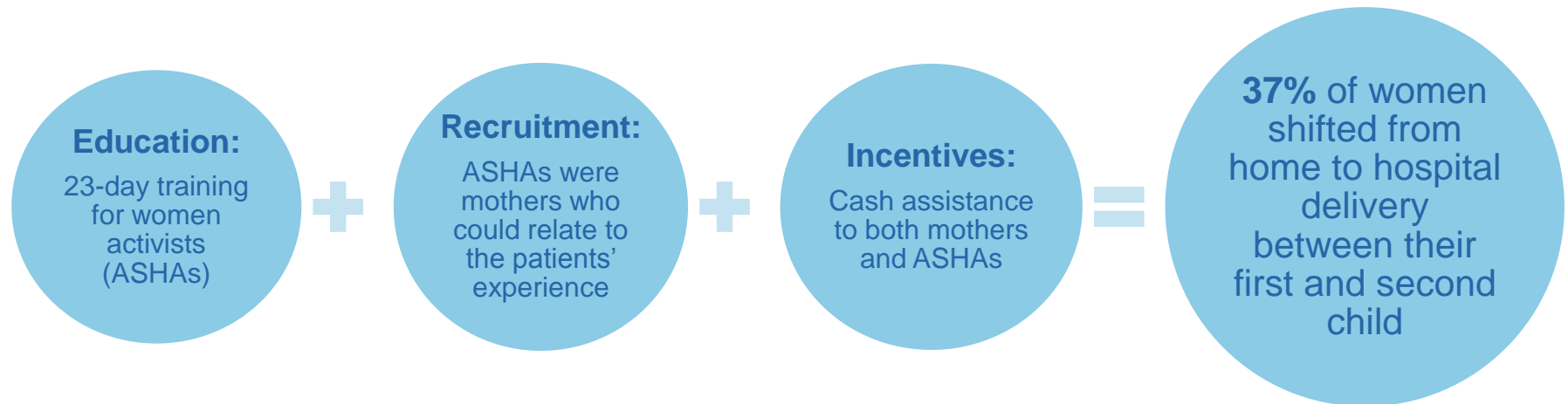
2. Fluent navigators

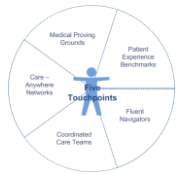
- 76% of global experts said inappropriate access to health knowledge obstructs individuals from managing their own health
- Fluent navigators fill service gaps and help patients access the right resources, specialists and information. They serve as upstream guides who are trained to be proactive about preventive care
- Successful examples of community health workers in India, Liberia, Bangladesh, US and Canada
- In several countries pharmacists are taking on navigator roles

How India is changing behaviour of mothers to reduce infant mortality rates

Traditional model: Mothers often give birth at home rather than the hospital, leading to an infant mortality rate ranked 143rd in the world

How the Indian government changed it:



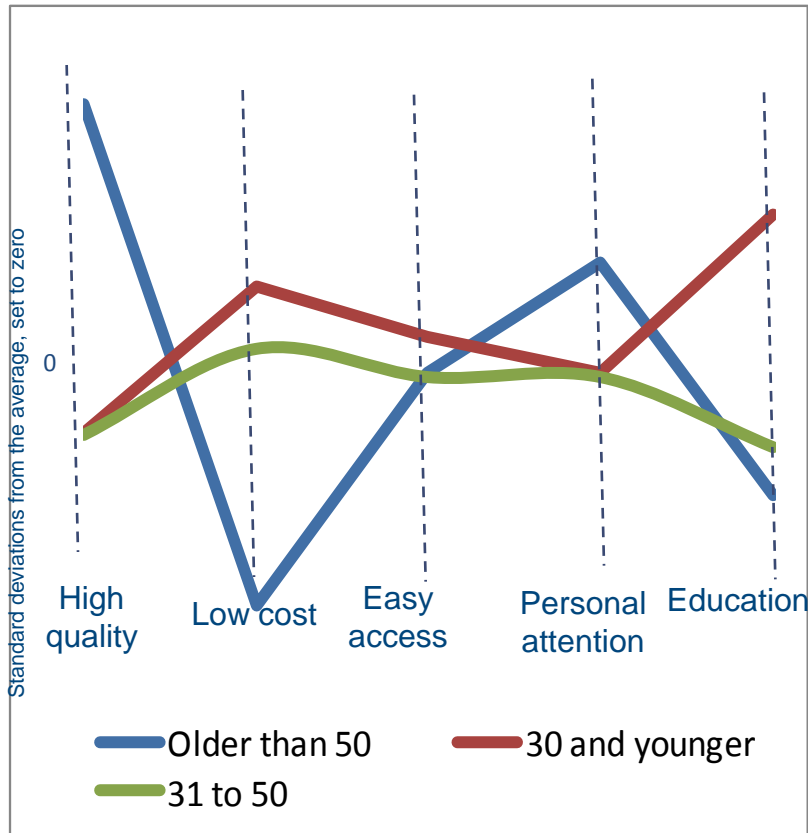


3. Patient experience benchmarks

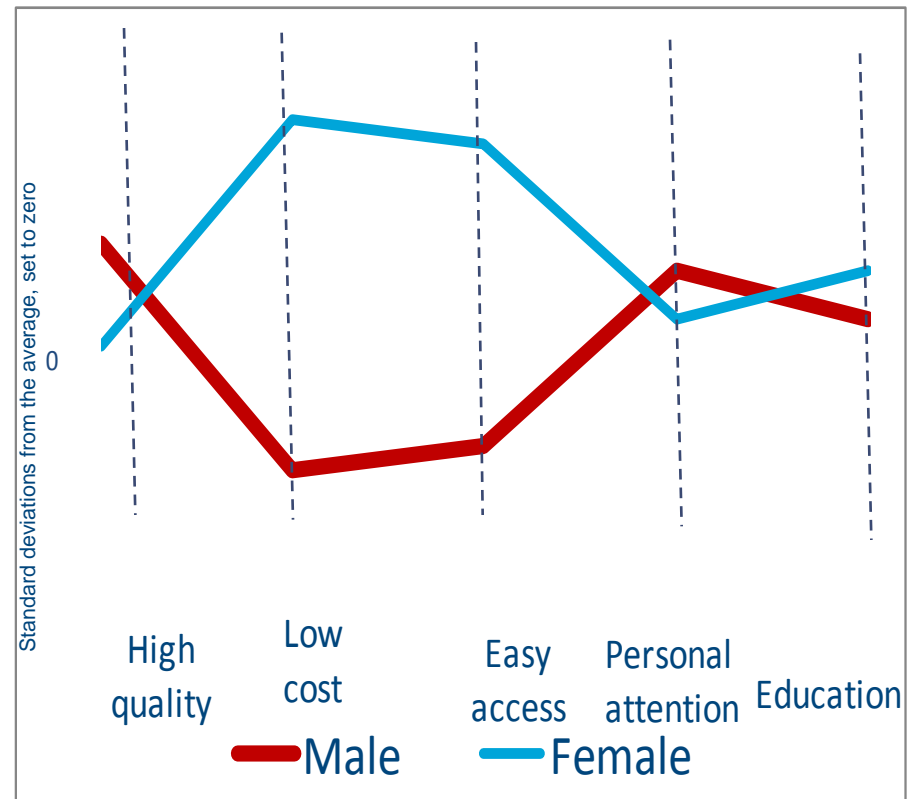
- Health systems are beginning to embrace more patient-centric metrics of care, focusing on issues that matter to users
- Importantly, this information is also being reported in more user-friendly ways on user-friendly mediums (e.g. the Internet), allowing patients to actively use data to inform choice
- It is also starting to be used by purchasers and payers to inform contracting and reimbursement decisions
- Public reporting is also a powerful incentive for providers to up their game. This will become increasingly more so as pressure from the private market increases

Identifying which issues matter most to patients remains a challenge

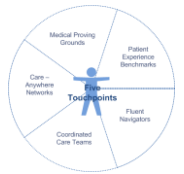
Valuation of health system attributes by age



Valuation of health system attributes by gender



Source: PwC Health Research Institute

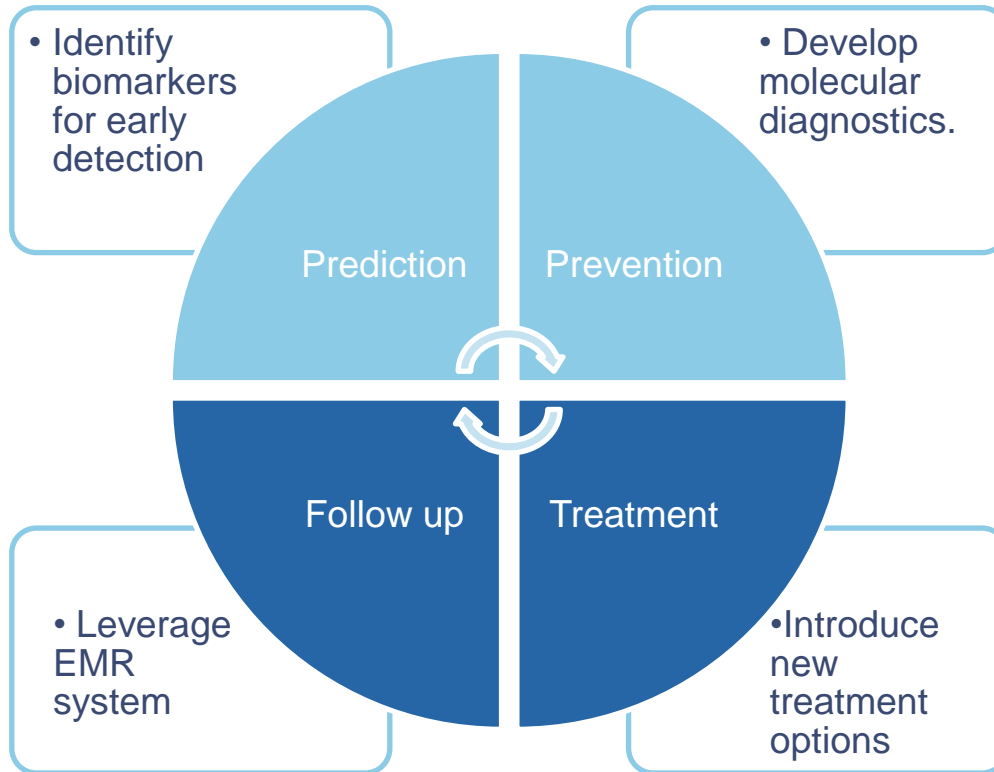


4. Medical proving grounds

- Through collaboration and investment, some countries and regions are making themselves medical proving ground for a new generation of medicine
- The concept is distinctive from traditional R&D processes in that it infuses new science into the delivery model
- Realising the full potential of biologics will require a consolidated effort among all players shaping their development – venture capital firms, (bio)pharmaceutical companies, drug regulators and payers

How Luxembourg is blending prediction, prevention, R&D, and treatment for lung cancer patients

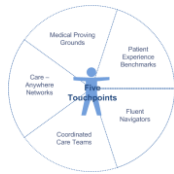
Traditional model
focuses on
treatment
and follow
up...



New model
focuses on
prediction and
prevention ...

Result →

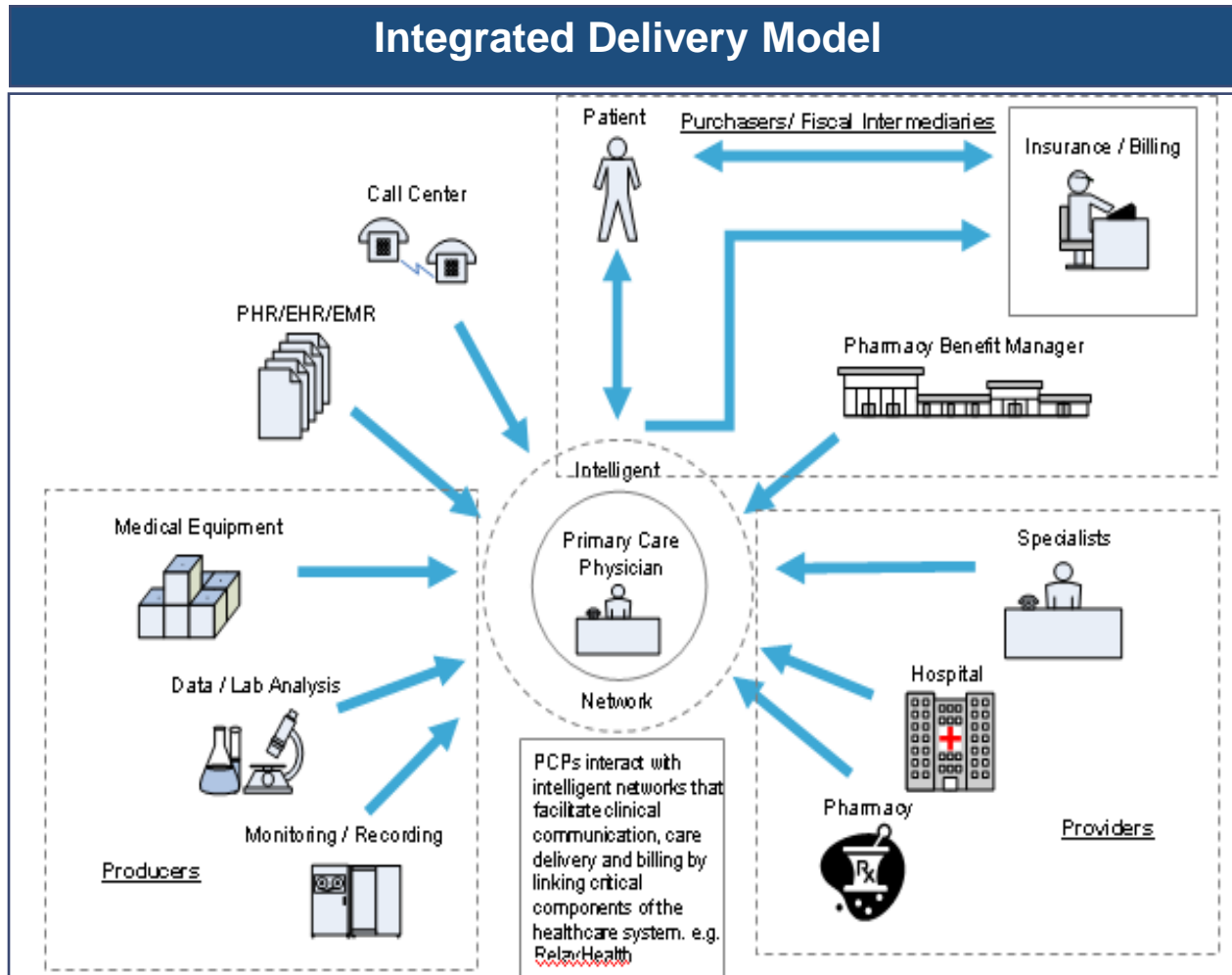
6.7 life years and 1.6 million Euros for every lung cancer patient



5. Care-anywhere networks

- 55% of global health leaders surveyed think increasing the distribution of services will make their health systems more efficient
- 50% said they were expanding services to enable home care specifically
- 40% of global consumers surveyed said they would consider receiving care via the telephone or internet
- This shift is being enabled by technological advancements and IT platforms
- Care-anywhere networks require strong partnerships across stakeholder groups and the right incentive mix to encourage information sharing and coordination

The Medical Home



Recommendations for stakeholders



- Industry stakeholders must reassess their roles, relationships and priorities as care is customised for patients
- No sector can achieve success on its own; common goals require collaboration efforts
- Success is not win-win, it's win-win-win-win

For a copy of the report, visit
<http://www.pwc.com/hri>

Thank you.

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