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# 2015 global health care sector outlook

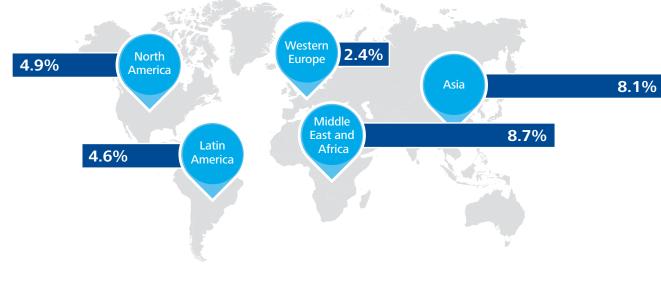
Deloitte Touche Tohmatsu Limited's yearly look at the topics, trends, and issues impacting the global health care sector

## **Sector overview**





## Where's the growth expected?



## health care spending

**Contradictory forces influence** 

- Aging population
- · Growth of
- emerging markets Advances in treatments



 Heath care cost reduction pressure

Aging population

Percentage age 60 and over





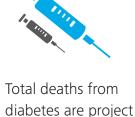


**Global health care drivers** — chronic disease



in 2008 were from non-communicable diseases

63% of deaths



to rise by more than 50% in the next 10 years



people per year, accounting for 10% of all deaths worldwide

**Top issues and trends** 

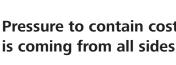


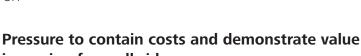


### Higher premiums, Affordable Care Act

**Cost increase factors** 

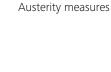








Coverage expansion



Consumers

cost and higher quality)

are being increasingly

looked at as a solution

### #IIII# Providers Governments Health plans



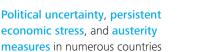


Continual cost increases and margin erosion are impacting all stakeholders

are calling into question the

sustainability of public health

care funding





Life sciences

New value-basedcare models focus on maximizing value (lower



Increasing role of government

broad reforms to cut cost and

Governments introducing

Competition for talent

Number of doctors to remain

flat, uneven distribution of caregivers, opportunities

outside of home markets

improve quality





Adapting

to market forces

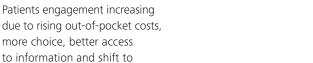


Consumerism



Globally, the number of doctors per 1,000 population is expected to remain virtually the same between

patient-driven health care models



Scale to prosper

Vertical and horizontal

integration, cross-industry M&A

Improving access to care

of traditional models

Emerging market expansion, innovative solutions outside



2012 and 2015





**Technology** 

improve the care process

Much focus on drug and patient safety

mHealth, telemedicine, AM, AI, diagnostics, wearables,

big data, and analytics are seen as a potential way to



Challenges

Challenges exist in widespread adoption due to

patient engagement, security, and privacy

Protected health information impacted by security breaches

and cyber attacks

Population health/ new care models



New technologies

### Push for payment transparency continues to take center stage

Safeguarding security and privacy likely to become more challenging with the evolving health care landscape



EHR: Electronic health record; ePHI: Electronic protected health information; PHR: Personal health record

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