Digital Disruption in the Healthcare Industry
Rani Argov, Partner, Deloitte Digital
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Agenda

1. Healthcare has been hit by the digital wave
2. New technologies and models enable changes in the Patient Journey
Disruption in Healthcare
Digital is transforming the value chain

Traditional Value Chain

- R&D
- Pharma Supplier
- B2B Marketing
- Hospital/ HCP
- Insurer/ Healthcare Network
- Patient

The new eco-system of value creation:

- R&D
- Medical Records
- Insurer
- Hospital/ HCP
- Digital Services
- Applications
- Network
- Treatment Experience
- Digital products
- Patient

Shift from linear to iterative functions to create value and connect with consumers

Patient uses several platforms and different agents to collect information
Digital technology is benefitting providers and patients

- Minimises avoidable service use
- Promotes patient independence
- Focusses on prevention
- Improves outcomes

Help communicating with HCP
17%

Info on symptoms and medical conditions
23%

View health records and tests
16%

Resons for using Health App

A mobile working solution for community nurses

-60% Paperwork time

Patient face time
+29%

Extra patients seen daily

A telehealth hub across 210 care homes
-35%

hospital admissions

-53%
Air use

-59%
Hospital bed days

75% of the UK population goes online for health information

 Patients using technology to manage their COPD:

- 97% High satisfaction
- 62% Increased confidence
- 94% Better treatment compliance
Changing consumer trends, emerging technologies, and new players drive disruption in the Healthcare sector.

Drivers of Disruption:
- Changing Consumer
- Technology
- New Players
New technologies enable the disruption in the Healthcare system
The digitally empowered consumer has new motivations & expectations

**PERSONALIZED**
- Tailored solutions
- Smart engagement

**EXPERIENCE DRIVEN**
- Loyal to platforms that differentiate the experience
- Willing to pay more for a comfortable and accurate experience
- Convenience driven

**TIME SAVING & “ON THE GO”**
- Looking for fast, efficient and minimum interactions
- On-the-go, and at-home services expected

**CONNECTED**
- Uses mobile to contact providers
- Expects Omni Channel integration
- Wisdom of the crowd as a source of knowledge

**TRANSPARENT**
- Medical information and research is now available online
- Biased by criticism and social networks
- Compares services and prices
New Players

New companies with new types of business models are in all areas of healthcare—from fitness tracking, to insurance companies and medical devices.
The New Patient Journey
The New Patient Journey | Health Awareness

- Monitors physical and psychological wellbeing with mobile apps, wearables, and DNA tests
- Is notified of anything unusual, could be connected to the right resource

MAIN MOTIVATION
Connected

MAIN TECHNOLOGY
Wearables & IoT

It pays to stay active

Stay in shape with a free Misfit Flash fitness tracker. Sync with the Oscar app to count your steps and earn $1 when you hit your daily goal. We’ll personalize your goal to keep you moving. You can get up to $240 each year just for being active.
The New Patient Journey | Research & Booking

- Researches symptoms online, looks for a reliable source and peer input
- Video or SMS chat with a doctor for initial referral
- Books appointment through mobile

MAIN TECHNOLOGY
Telemedicine

MAIN MOTIVATION
Time Saving & On-the-Go
The New Patient Journey | Consultation

- In-office visits use digital to enter patient info and give targeted educational content
- Many consultations may be held through mobile or video chat
Deloitte.

The New Patient Journey | Testing & Diagnosis

- Tests can be sent from home
- Big data and AI support the doctor more accurate diagnosis based on results
- Results are available though mobile

MAIN TECHNOLOGY
- Data & Analytics
- IoT

MAIN MOTIVATION
- Time Saving & On-the-Go

Health Awareness → Research & Booking → Consultation → Testing & Diagnosis → Treatment & Monitor

MODERNIZING MEDICINE

DARIO
The New Patient Journey | Treatment & Monitor

- Medical records are stored digitally where they can be shared with multiple doctors and the patient himself.
- Medical data is shared to inform other patients' treatments.

Main Motivation: Transparent

Main Technology: Data & Analytics
Digital is connecting steps across the journey for a less linear, more iterative process

Example: Kaiser Permanente healthcare system serving 10.7 million in U.S.

- Conducts over 50% of patient visits digitally (smartphone, videoconferencing, kiosks, etc.)
- Collects and stores data digitally, to inform individual patient care and provide data for better diagnosis and treatment throughout the entire network.
Thank you!

rargov@deloitte.co.il