



## Global health care outlook

# Bending the cost curve with Big Data and Culture Transformation

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# Global health care industry issues in 2014

## Aging population and chronic diseases

- Increasing life expectancies
- Spread of chronic diseases
- Emerging markets

## Cost and quality

- Affordability
- Quality

## Access to care

- Workforce shortages
- Patient locations
- Infrastructure limitations

## Technology

- Innovation
- Technology advancements
- Data management

# Global health care industry issues in 2014

## Sample Issue- Aging population and chronic diseases

*The shared, long-term trends of an **aging population** and an increase in people inflicted with **chronic diseases** are expected to drive demand for health care services in both developed and emerging economies in 2014 and beyond.*

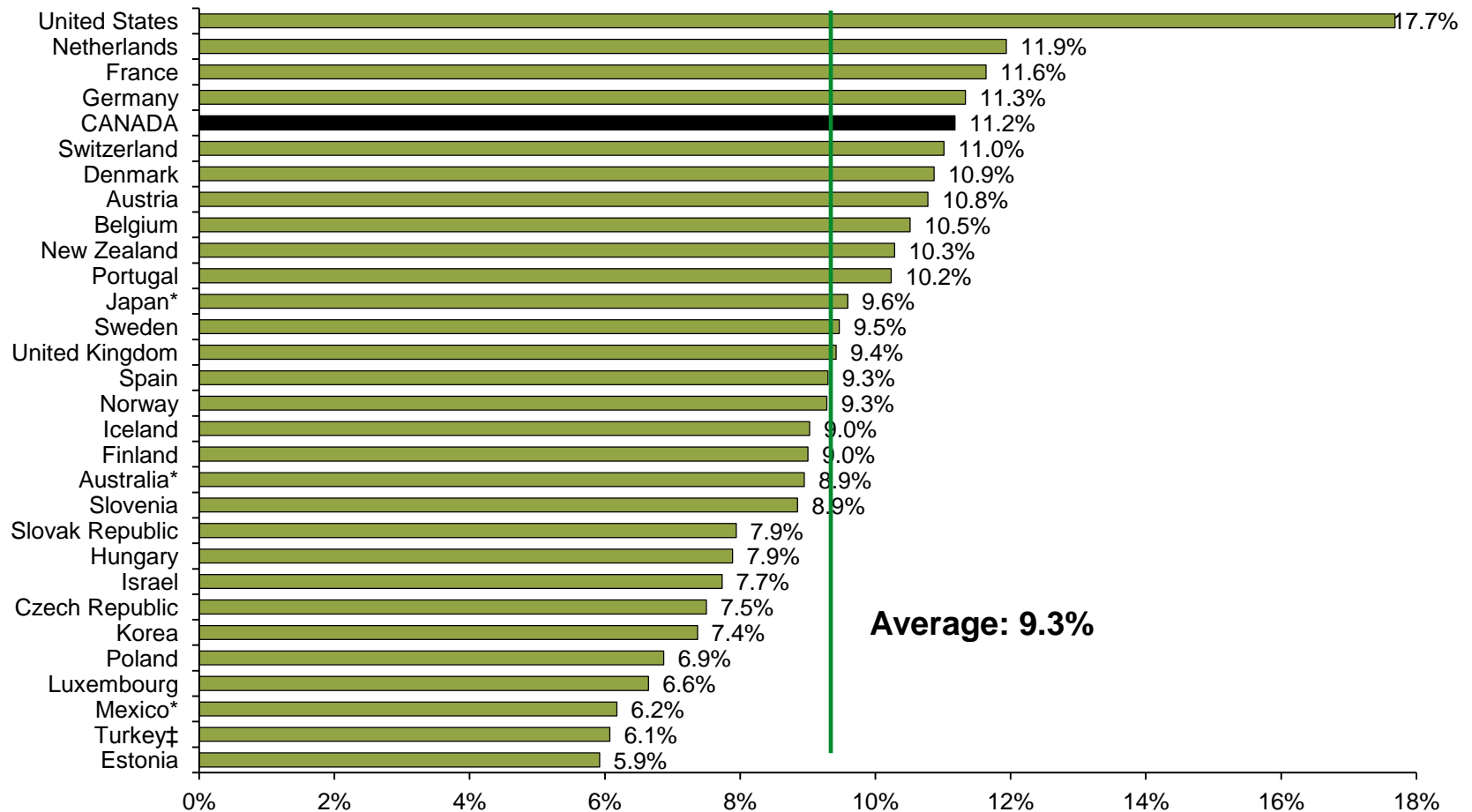
### Increasing life expectancies

- Aging populations and increasing life expectancies are expected to place a huge burden on the health. The global population age 60 or above has **tripled over the last 50 years** and is expected to more than triple again over the next half-century.

### Rise of chronic diseases

- It's attributed by the aging population, more sedentary lifestyles, diet changes, and rising obesity levels, as well as improved diagnostics.
- Chronic diseases are by far, the leading cause of mortality in the world representing **63 percent of all deaths**.

# Canada spends more on health as a % of its economy than most OECD countries



## Notes

\* Data for 2010. ‡ Data for 2008.

## Source

OECD Health Data 2013, June edition.

# But more spending doesn't equal higher quality or better health care

## EXHIBIT ES-1. OVERALL RANKING

### COUNTRY RANKINGS

Top 2\*

Middle

Bottom 2\*



AUS CAN FRA GER NETH NZ NOR SWE SWIZ UK US

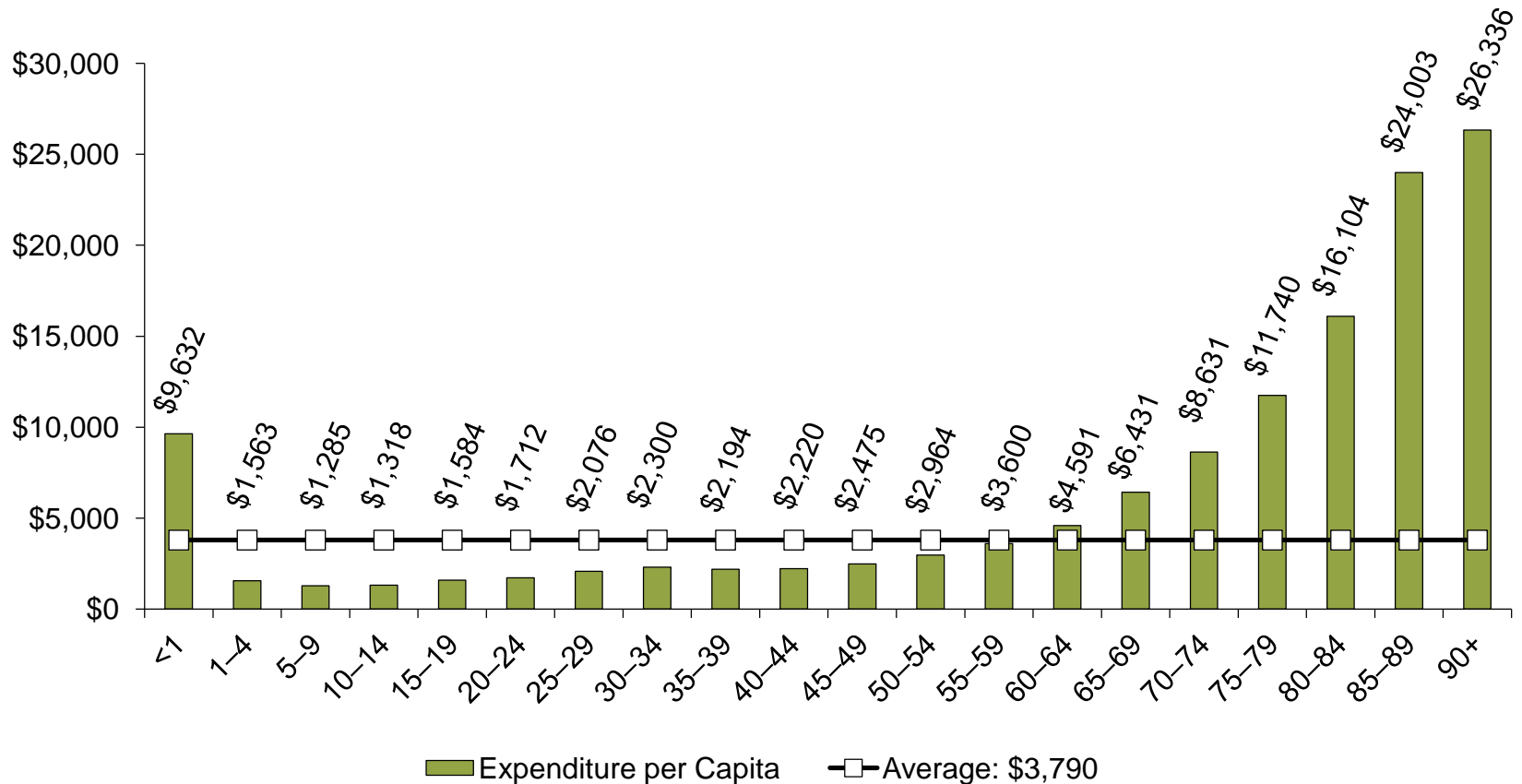
	AUS	CAN	FRA	GER	NETH	NZ	NOR	SWE	SWIZ	UK	US
<b>OVERALL RANKING (2013)</b>	4	10	9	5	5	7	7	3	2	1	11
<b>Quality Care</b>	2	9	8	7	5	4	11	10	3	1	5
Effective Care	4	7	9	6	5	2	11	10	8	1	3
Safe Care	3	10	2	6	7	9	11	5	4	1	7
Coordinated Care	4	8	9	10	5	2	7	11	3	1	6
Patient-Centered Care	5	8	10	7	3	6	11	9	2	1	4
<b>Access</b>	8	9	11	2	4	7	6	4	2	1	9
Cost-Related Problem	9	5	10	4	8	6	3	1	7	1	11
Timeliness of Care	6	11	10	4	2	7	8	9	1	3	5
<b>Efficiency</b>	4	10	8	9	7	3	4	2	6	1	11
<b>Equity</b>	5	9	7	4	8	10	6	1	2	2	11
<b>Healthy Lives</b>	4	8	1	7	5	9	6	2	3	10	11
<b>Health Expenditures/Capita, 2011**</b>	<b>\$3,800</b>	<b>\$4,522</b>	<b>\$4,118</b>	<b>\$4,495</b>	<b>\$5,099</b>	<b>\$3,182</b>	<b>\$5,669</b>	<b>\$3,925</b>	<b>\$5,643</b>	<b>\$3,405</b>	<b>\$8,508</b>

Notes: \* Includes ties. \*\* Expenditures shown in \$US PPP (purchasing power parity); Australian \$ data are from 2010.

Source: Calculated by The Commonwealth Fund based on 2011 International Health Policy Survey of Sicker Adults; 2012 International Health Policy Survey of Primary Care Physicians; 2013 International Health Policy Survey; Commonwealth Fund *National Scorecard 2011*; World Health Organization; and Organization for Economic Cooperation and Development, *OECD Health Data, 2013* (Paris: OECD, Nov. 2013).

# On average, Canada spends 3x more on older seniors than on younger seniors

Total P/T Health Spending Per Capita, 2011



**Sources**

National Health Expenditure Database, CIHI; Statistics Canada.

# Global health care industry issues in 2014

## Sample Issue- Access to care

Improving health care access appears to be a major goal of governments around the world, and a centerpiece of many reform efforts.

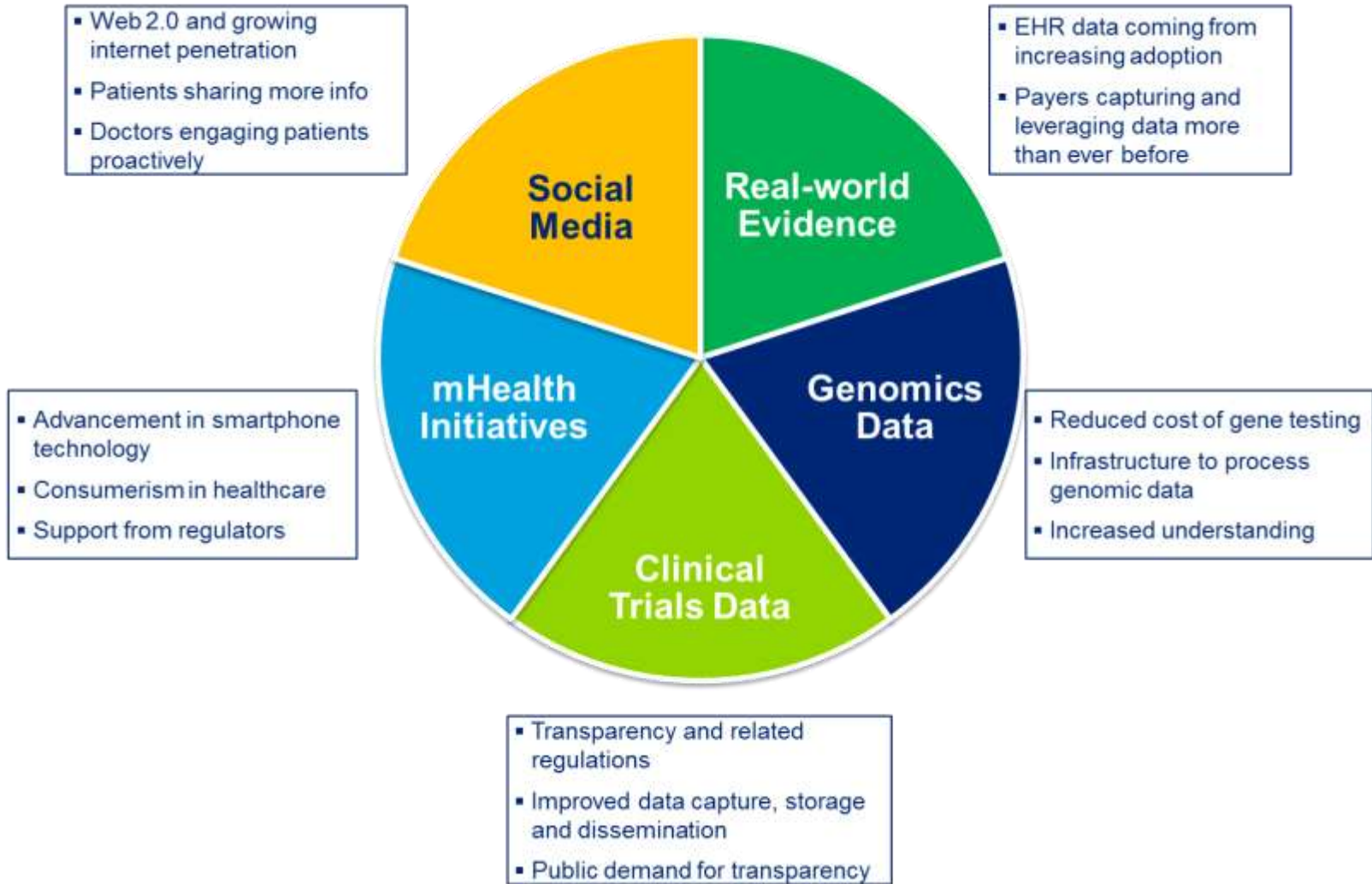
### Workforce shortages

- Unable to meet a countries' needed number of **health care workers**, a shortage that directly affects the quality of care.
- **Uneven distribution** of caregivers is also a problem. Some countries are dramatically increasing workers while others are inadequately behind.

### Patient locations

- Large portions of the global population live in **rural settings** where basic health care infrastructure does not exist.

# Why is Big Data a Big Opportunity Now





“Everybody is trying to systemically improve value and quality, but at Intermountain they have worked out the operational system and culture to do it.”

John Mendelsohn, MD  
President,  
MD Anderson Cancer Center



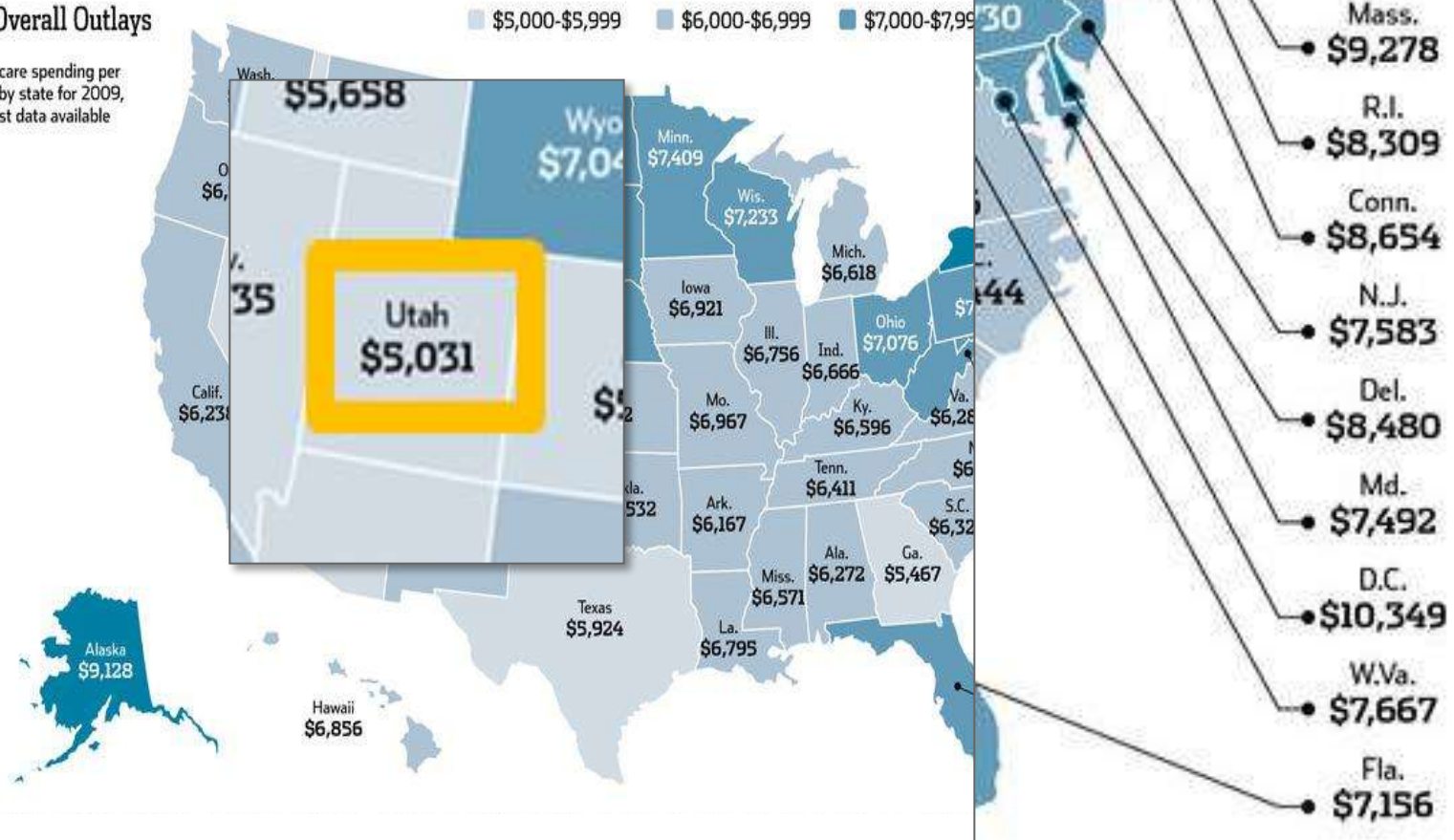
Source: *If Healthcare is Going To Change, His Ideas Will Change It*, NYT Magazine, November 8, 2009

## Around the Nation

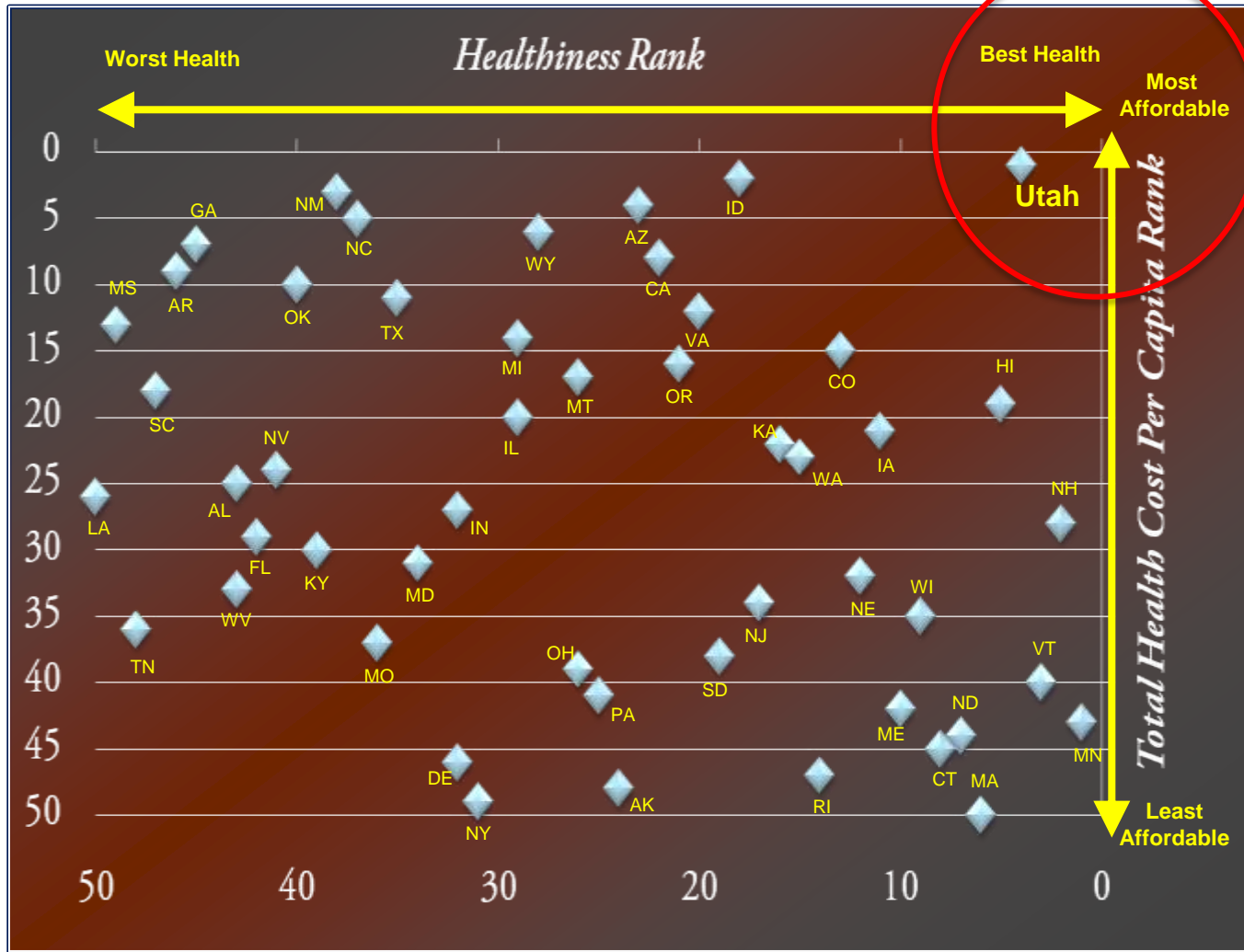
A breakdown of health-care spending state by state

### \$ Overall Outlays

Health-care spending per person by state for 2009, the latest data available

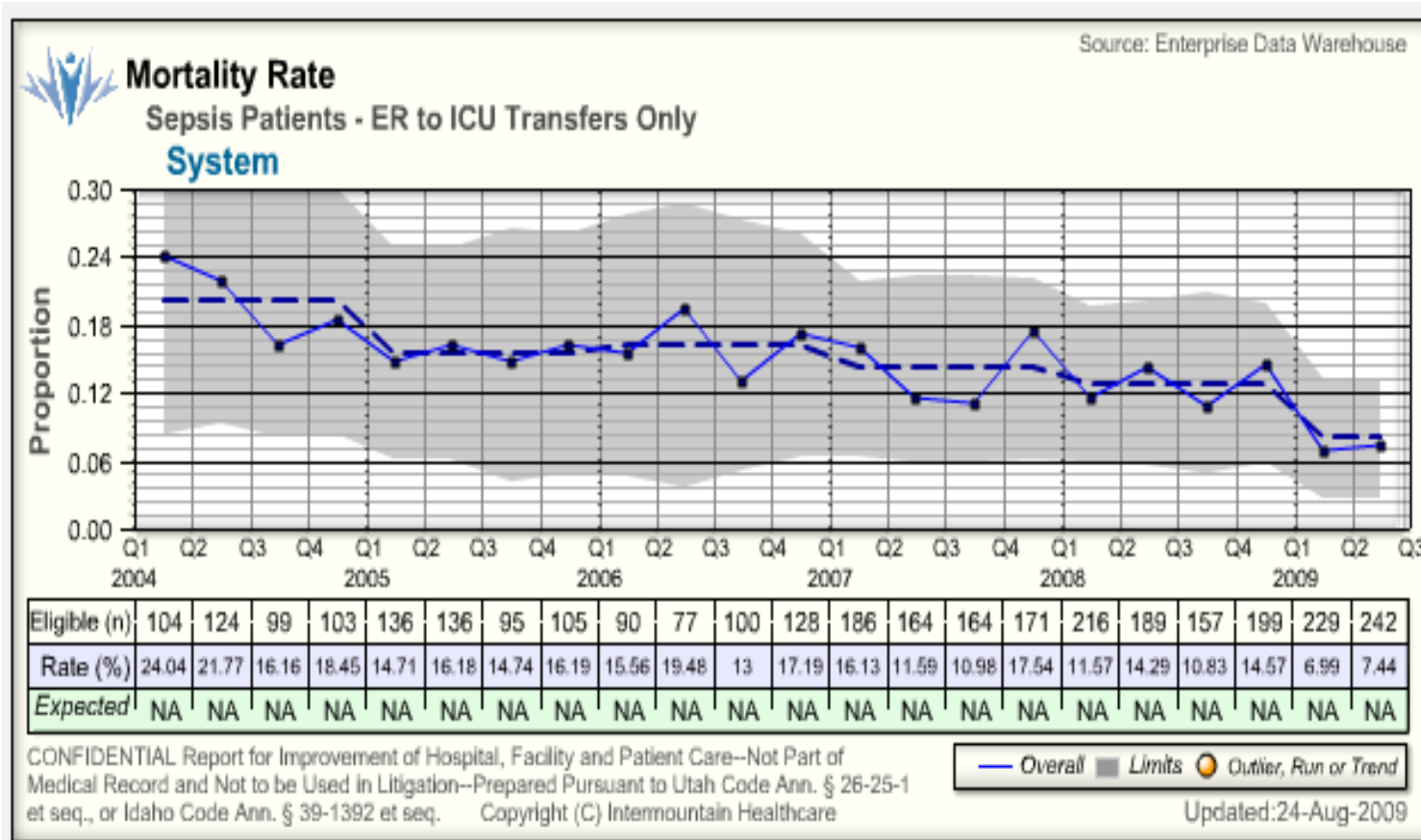


# State Rankings of Healthiness Compared to Total Health Cost Per Capita Rank

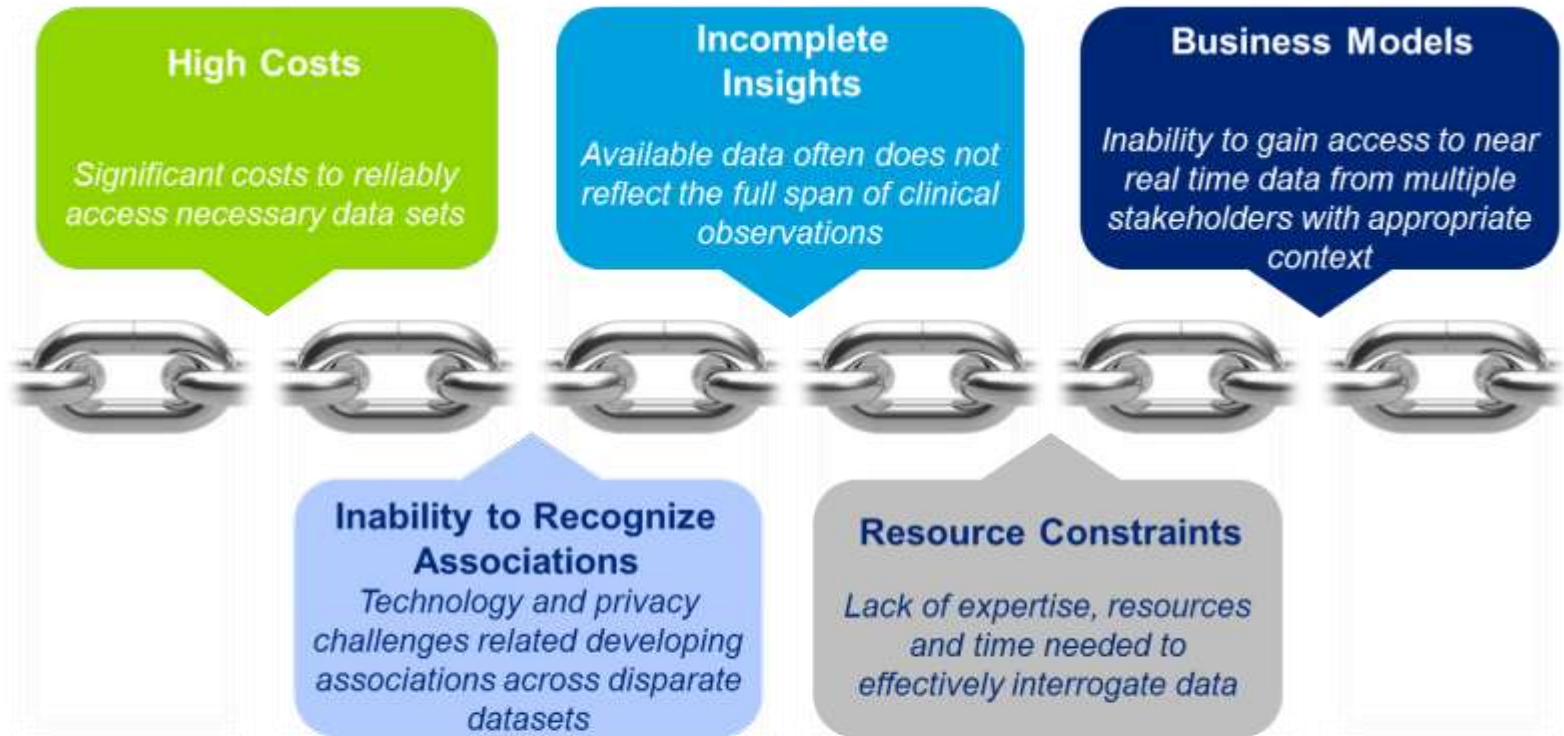


# Sepsis Mortality at Intermountain Healthcare

(National Sepsis Mortality Rates 40%-60%)



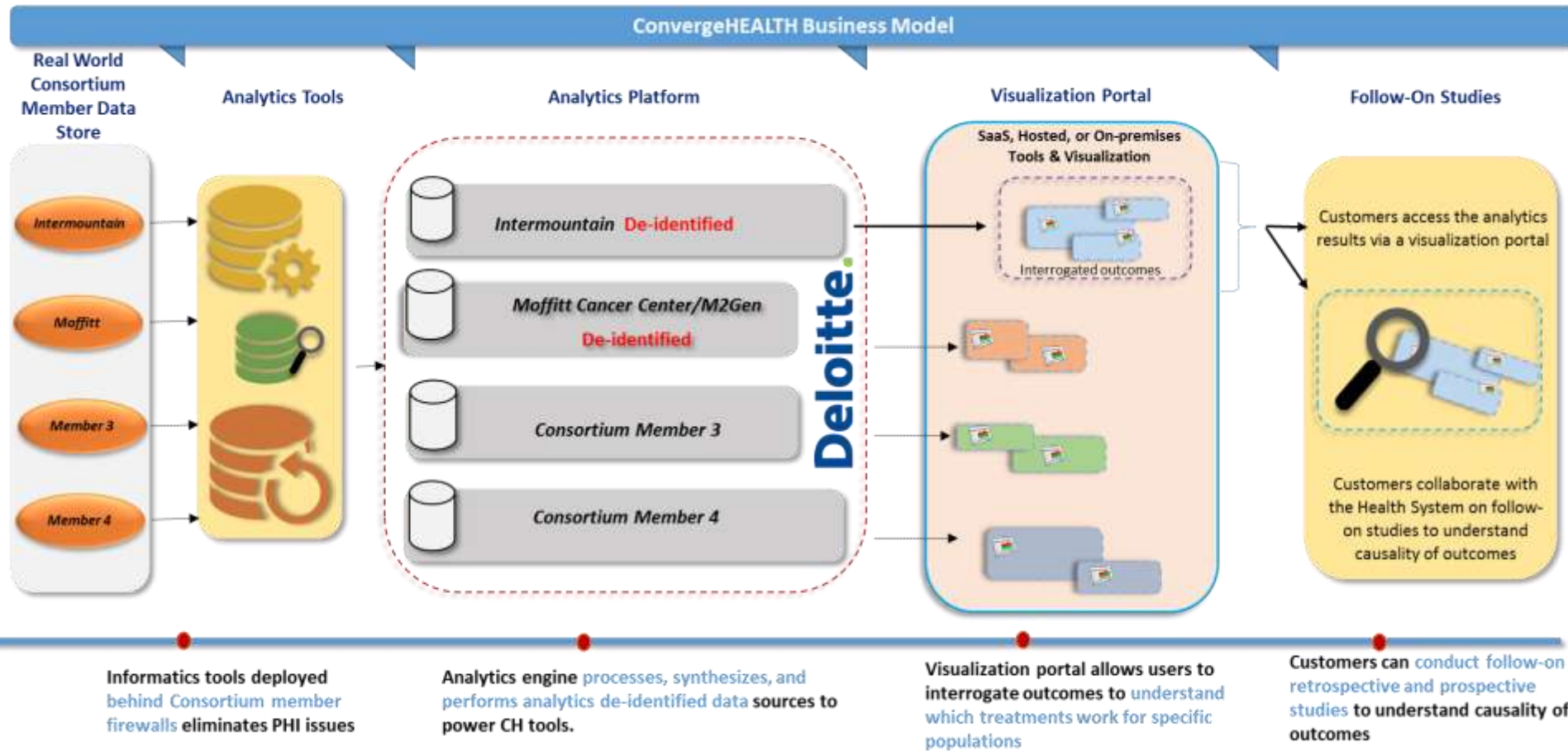
# Sample Big Data Issue: Real World Evidence



Successful use of data requires: 1) widespread and easy accessibility to existing data and evidence assets, 2) clinical nuances and background to derive insights from data, 3) near real-time connectivity to health systems to further build on that evidence, and 4) appropriately skilled resources to do the same



# Sample Deloitte Solution: RWE Consortium with Intermountain





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