

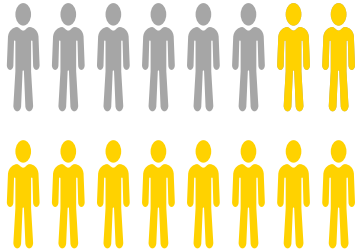
DIGITALIZATION IN HEALTHCARE

2nd Sino-German Health Dialogue/ 29. Gemeinsame
Jahrestagung der CDGM/DCGM

13.06.2016, Beijin

Christian Egle, Partner EY Healthcare

Patients expect simple and innovative tools to manage their health



65% of consumers want digital access to their medical data



72% of internet users search online for health related information

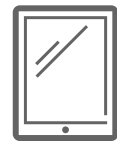
72% of consumers would prefer a Multichannel-provider.

54% prefer to book their physicians appointments online.



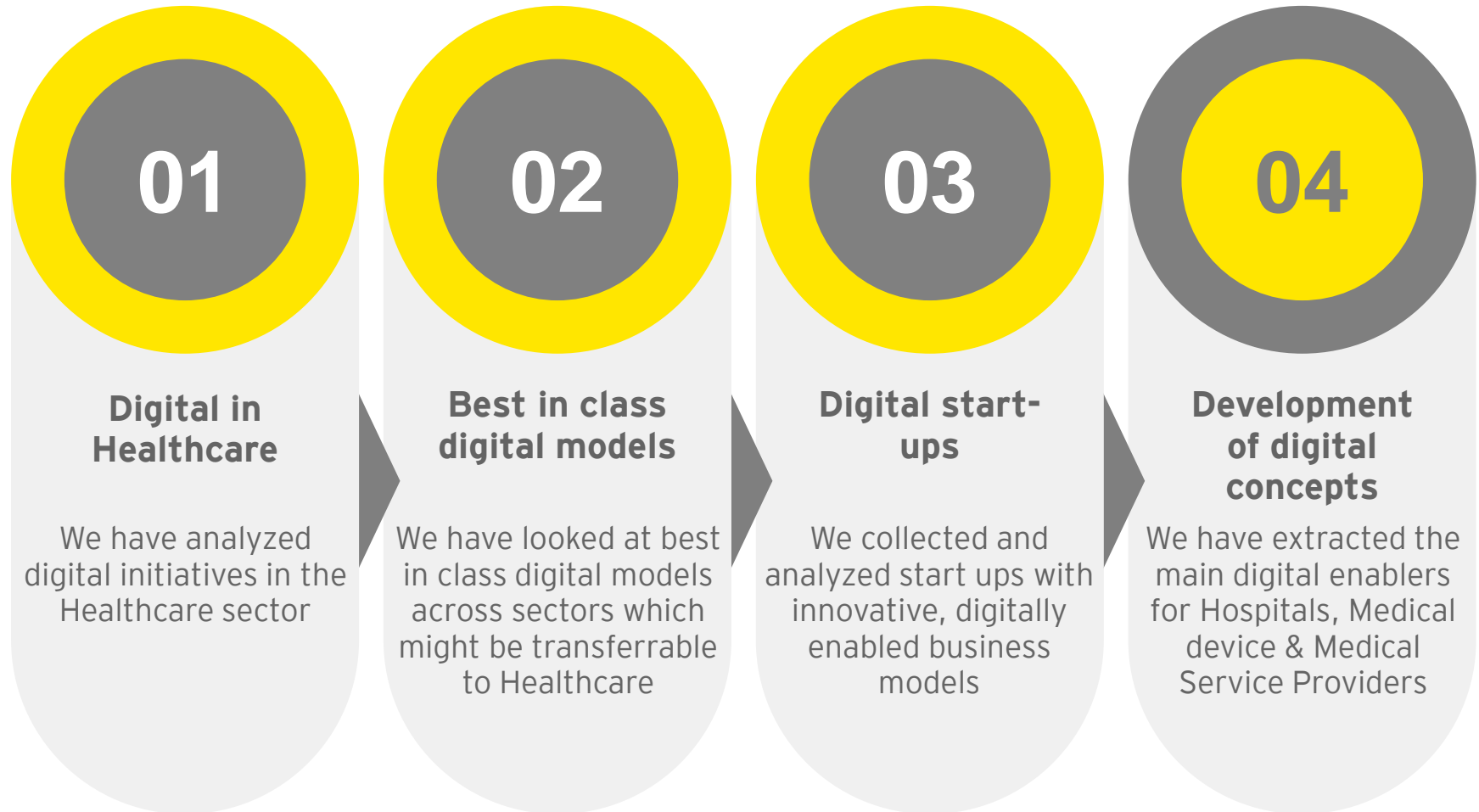
67% of consumers noted that a better understanding for costs influences their choice of provider significantly.

52% of smart phone users use their device to search of health related information



We have assessed the digital sphere to understand the implications for Healthcare

Our approach included 4 steps:



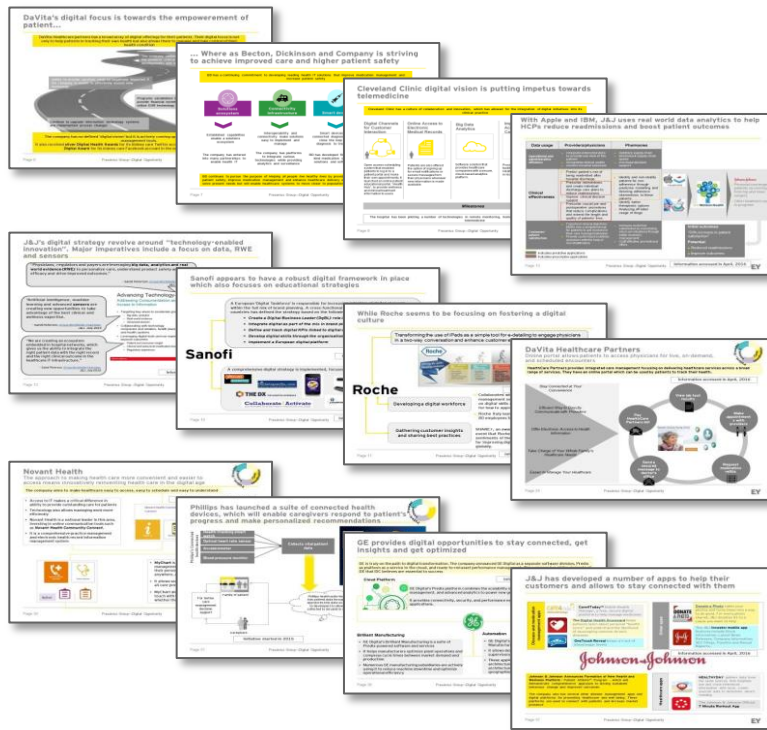
Digital Research



We have analyzed digital activities in the Healthcare sector

01

Analysis of digital activities of large players in the Healthcare sector



Focus areas for digitalization in the Healthcare sector



Information exchange
based on electronic health records



Convenient access to care
through mobile solutions

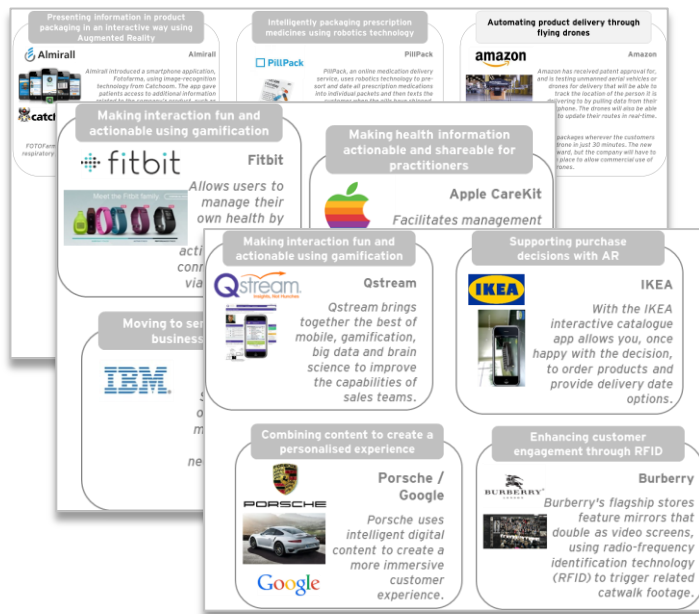


Data generation and remote monitoring
via smart solutions

We have looked at best in class digital models changing customer interaction

02

Analysis of organizations' business models and their best in class digital capabilities



Shared aims of best in class digital models



Patient self-management and monitoring



Easy sharing of own data

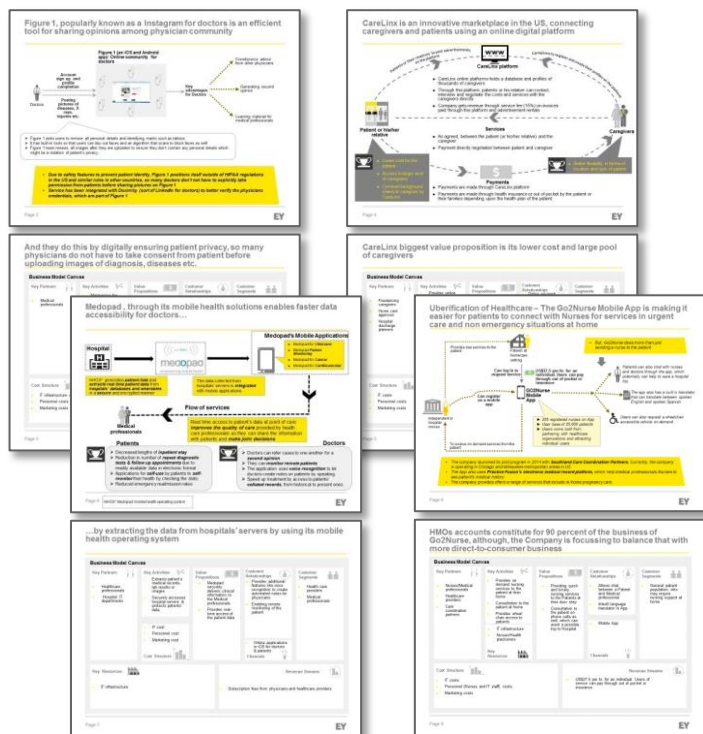


Shifting to service business models

We have looked at digitally enabled Start-ups

03

Analysis of business models of digitally enabled Start-ups in Healthcare



Major trends for digital health start-ups



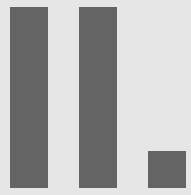
Data Sharing
between Healthcare professionals & patients



Digital marketplace
for Healthcare products and services



Mobile Health apps
for Healthcare professionals and patients



Digital concepts for Hospitals, Medical Device Manufacturers and Medical Service Providers

Digital initiatives in Hospitals

04

Digital initiatives for Hospitals



Digital discharge management

Digital knowledge sharing between experts in different hospitals

Digital decision making support for physicians

Predictive modeling

Utilization of **robotics** in Hospital logistics

Digital admission (from home) to reduce wait times

Digital patient history

Smart medical devices

Digital supply chain to improve efficiency

Digital education of patients

Extend treatment from hospital to patient at home

Big data analytics

Alarms/ push notifications for physicians/ nurses

Digital initiatives for Medical Devices manufacturer

04

Digital initiatives for Medical Devices



Optimized
reimbursement
models

Connected medical devices generating
and exchanging patient & machine
data

Value based healthcare
optimizing outcome, considering
risk-sharing models

Production of **personalized**
products based on patient
data

Patient self-management
through **tele-monitoring** and
smart medical devices

Improve **patient mobility** by
establishing a network of
specialist clinics

Leverage data
for **predictive**
maintenance

Using predictive
analytics for **machine**
inventory
management

Utilization of data
for optimized
product
development

Digital initiatives for Medical Services provider

04

Digital initiatives for Medical Services



Value based
Healthcare with
outcome care

Holistic discharge
management to
homecare
environment

Support patient
mobility

Escort the patient
throughout the lifetime

Access to **tools for**
training on right
product usage

Support
adherence
using digital
tools

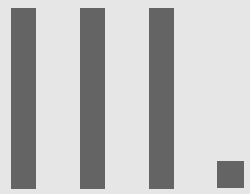
Report **critical**
health status for
immediate
intervention

Enable **real time**
interaction and data
flow

Provide **Tele-**
support for
patients and
relatives at
home for
improved
self-
management

Digital solutions
reducing
administrative tasks

Recruit and up-skill
healthcare
professionals



Digital in Healthcare



Digital visions in Healthcare

The digital future will bring innovations to all stakeholders in the Healthcare market

Hospitals

Connecting patients, staff and stakeholders along the health continuum

MedTech / Pharma

Smart connected products for improved diagnosis and treatment

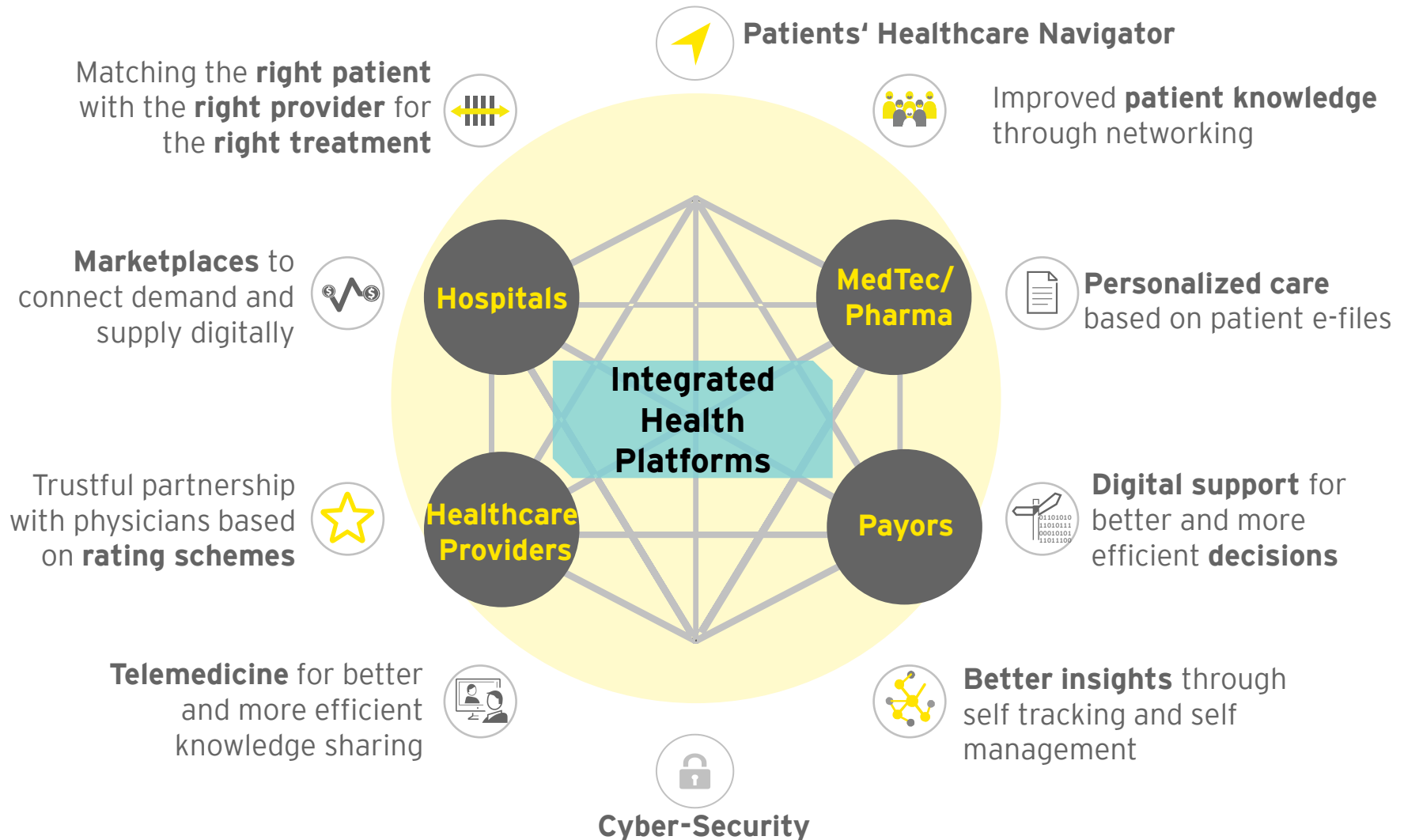
Healthcare providers

Connected diagnosis and coordinated care

Payors

Improving health of the insured population and contain costs

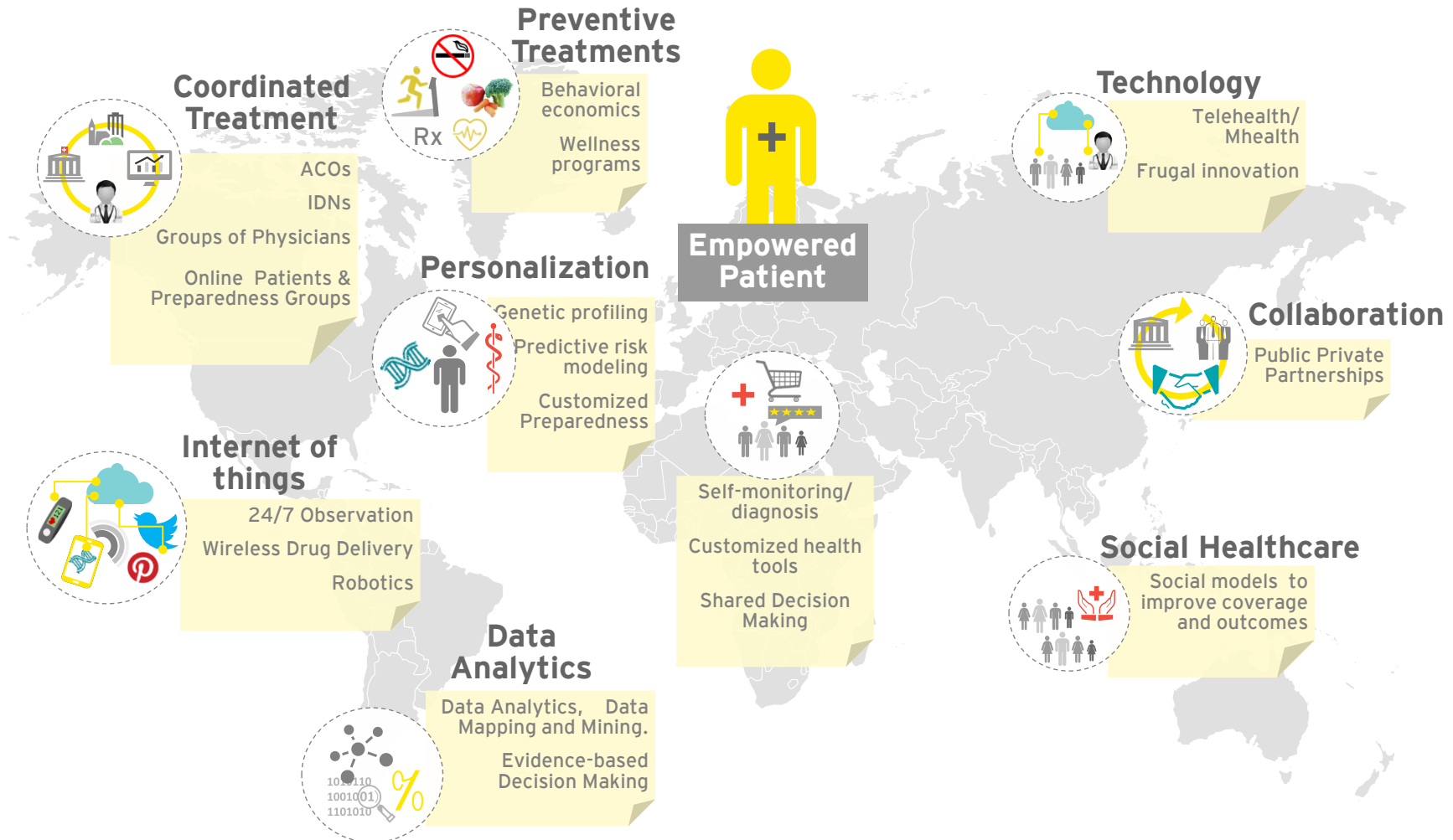
As ecosystems emerge, networked platforms become increasingly important



2025 will be a shift of paradigm regarding the supply of health care services

Developing markets

Growing markets



Contact



Christian Egle

Partner | Leiter Health Care Advisory GSA

Tele	+49 6196 996 21226
Mobile	+49 160 939 21226
Fax	+49 181 3943 21226
Email	Christian.Egle@de.ey.com