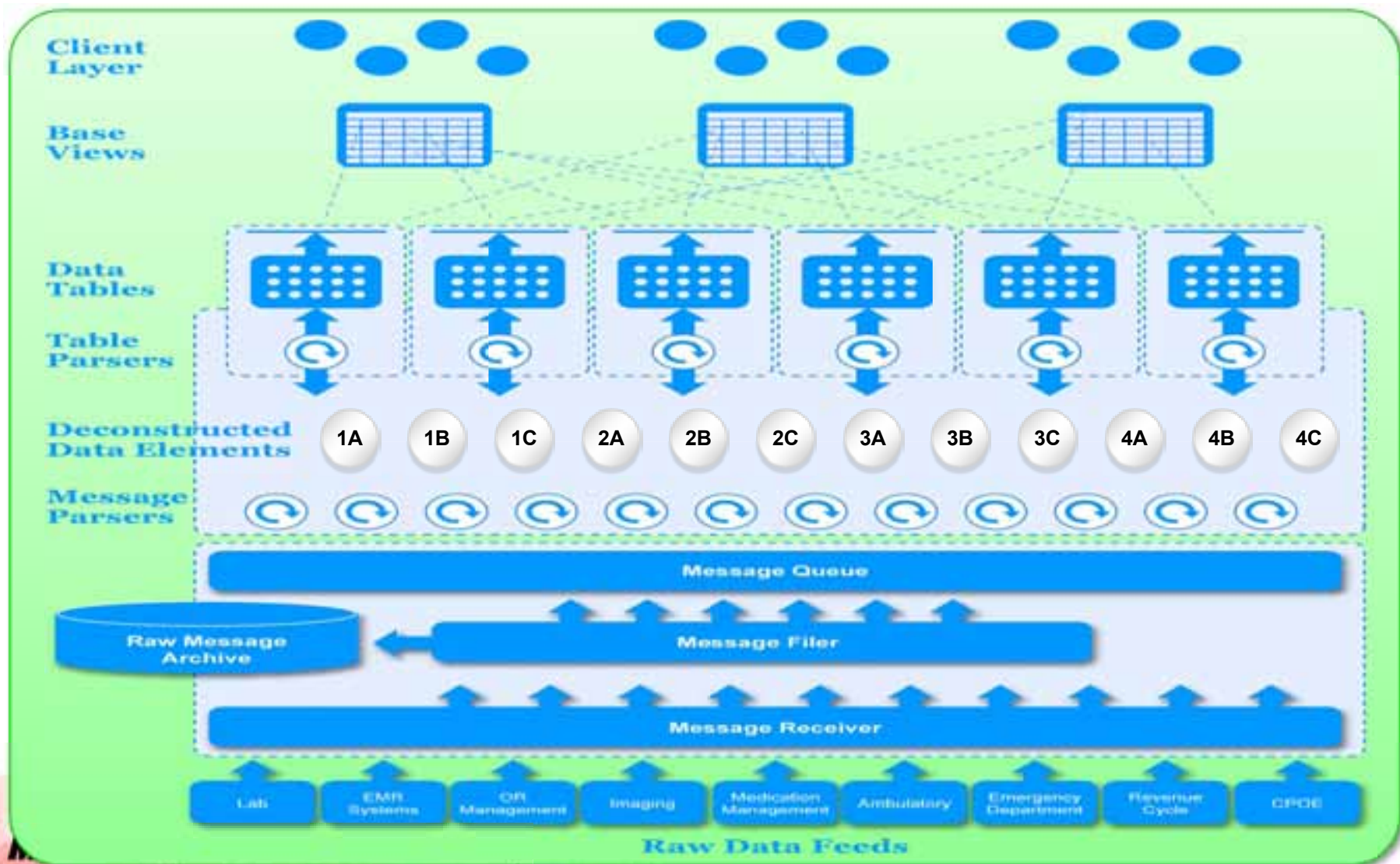


A diverse group of healthcare professionals, including a woman in blue scrubs in the foreground and several others in white coats and scrubs in the background, standing in a hospital hallway. The scene is brightly lit and conveys a sense of a modern, collaborative healthcare environment.

# The democratisation of healthcare and the rise of the consumer

Dr Mark Parrish

# Manageable | How Amalga Works



# The democratisation of healthcare

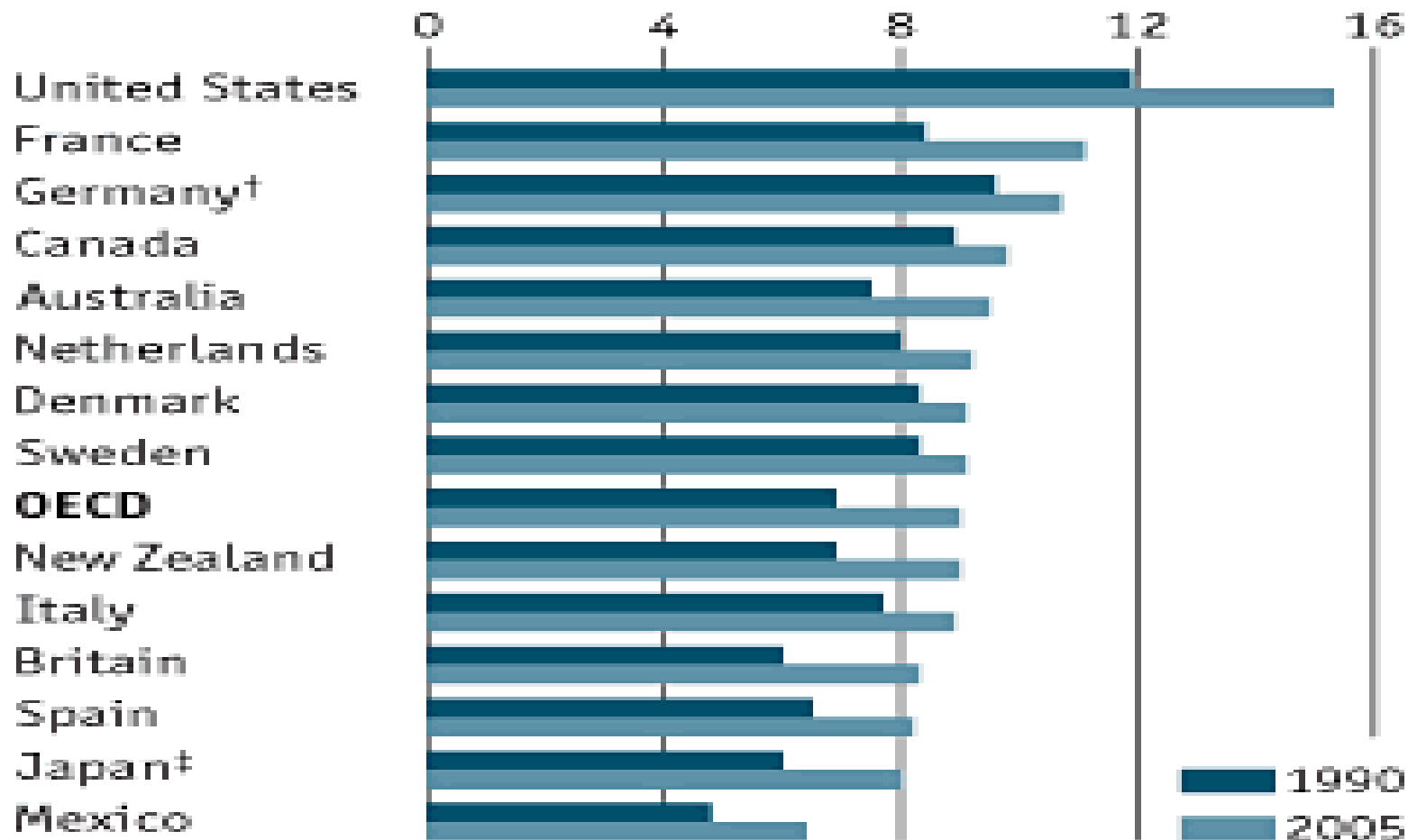
- **The problems of healthcare**
- What's going to happen in the future?
  - Providers
  - Payers
- The rise of the consumer
- Conclusion

# The problems of healthcare

- Increasing healthcare costs

# Health spending

Public and private expenditure\*, % of GDP



Source: OECD

\*Selected countries

†1992 & 2005

‡1990 & 2004

# The problems of healthcare

- Increasing healthcare costs
- Changing models of care
- An ageing population
- Ageing staff
- Infrastructure struggling to service demand
- Increases in chronic diseases
- An increasing awareness of risk
- Globalisation

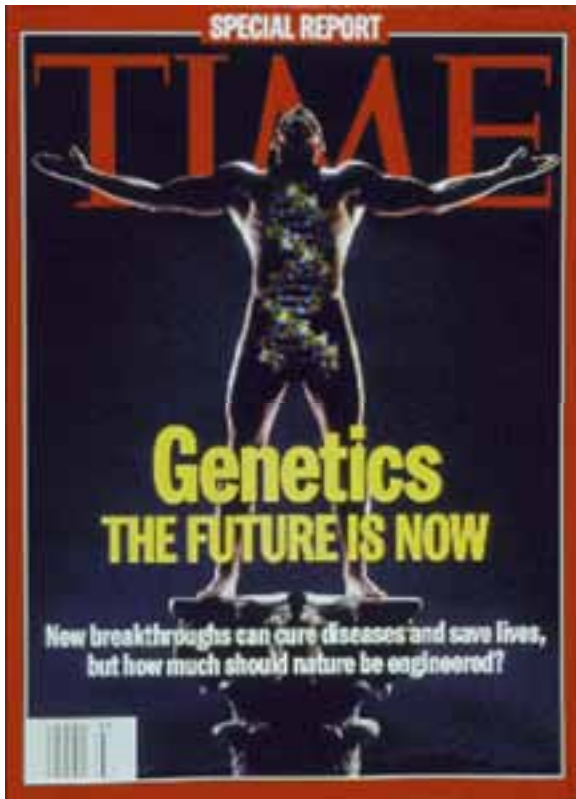
# And...

- The last cottage industry
- Market? What market?
- I'm in a tribe and I'm proud of it

# The tribes of health



# And..the human genome: a starting point, not an endpoint



# And more ....pharmacogenomics

**Herceptin<sup>®</sup>**  
**Trastuzumab**  
anti-HER2 monoclonal antibody



**HER2 Test**

CYP Test to  
determine  
drug  
metabolism



# And finally...."patient centric healthcare"



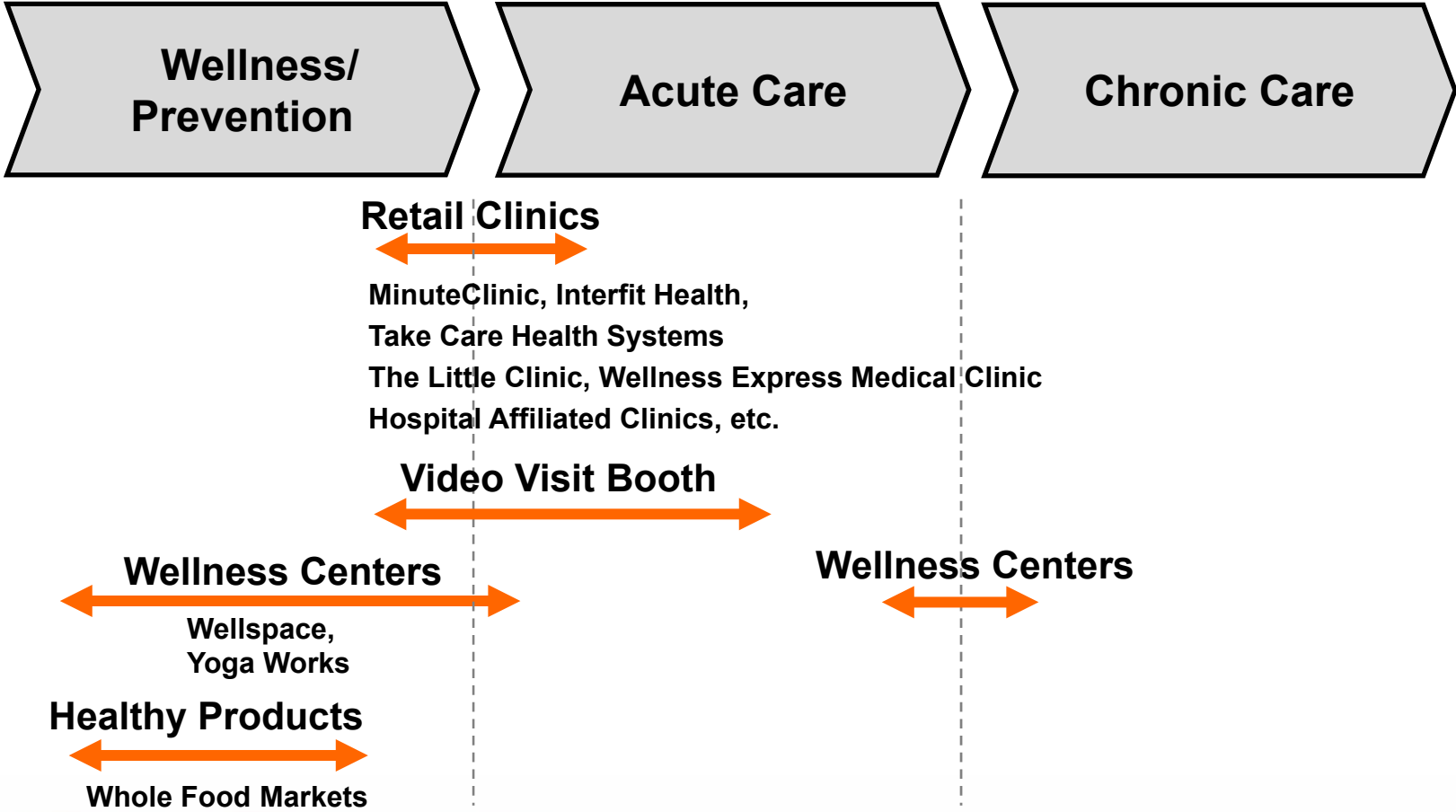
# The democratisation of healthcare

- The problems of healthcare
- **What's going to happen in the future?**
  - **Providers**
  - **Payers**
- The rise of the consumer
- Conclusion

# Providers

- Workforce changes (hard)
- Care model changes: specialised hospitals, polyclinics (careful.....)

# Some care model changes



# Providers

- Workforce changes (hard)
- Care model changes: specialised hospitals, polyclinics (careful.....)
- Focus on prevention (how? Not very exciting)
- Deal with political influences (hard)

# Payers

- More “appropriate” care
- Move from supply model to demand model
- Payment matched to performance
- Increased focus on quality

# The democratisation of healthcare

- The problems of healthcare
- What's going to happen in the future?
  - Providers
  - Payers
- **The rise of the consumer**
- Conclusion

# The rise of the consumer

Video: the frustrated consumer

# How can the consumer make a difference?

- **By becoming more responsible for their care**
- By changing their definition of value
- By driving changes in the delivery of care

# Consumers become more responsible for their care

- Understanding the options better
- Comparison shopping
- Personalised medicine, making better choices
- The health infomediary

# Consumers become more responsible for their care

2008 04 21 let patients control the purse strings.pdf - Adobe Reader

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## Let patients control the purse strings

Patient choice is much talked about in the NHS and other health systems but action has been limited. **Vidhya Alakeson** argues that piloting individual healthcare budgets would signal real commitment to creating patient centred care

As the burden of disease shifts from acute to chronic care, governments are having to reshape health services. The UK health white paper, *Our Health, Our Care, Our Say*, published in January 2006, outlines four goals: greater prevention and early intervention, more choice and a louder voice for patients, more support for people with long term needs, and tackling inequalities. Other countries in the Organisation for Economic Cooperation and Development have stated similar objectives. If governments are serious about these aims, they would do well to learn from recent innovation in social care. In the United Kingdom, the Netherlands, the United States, and

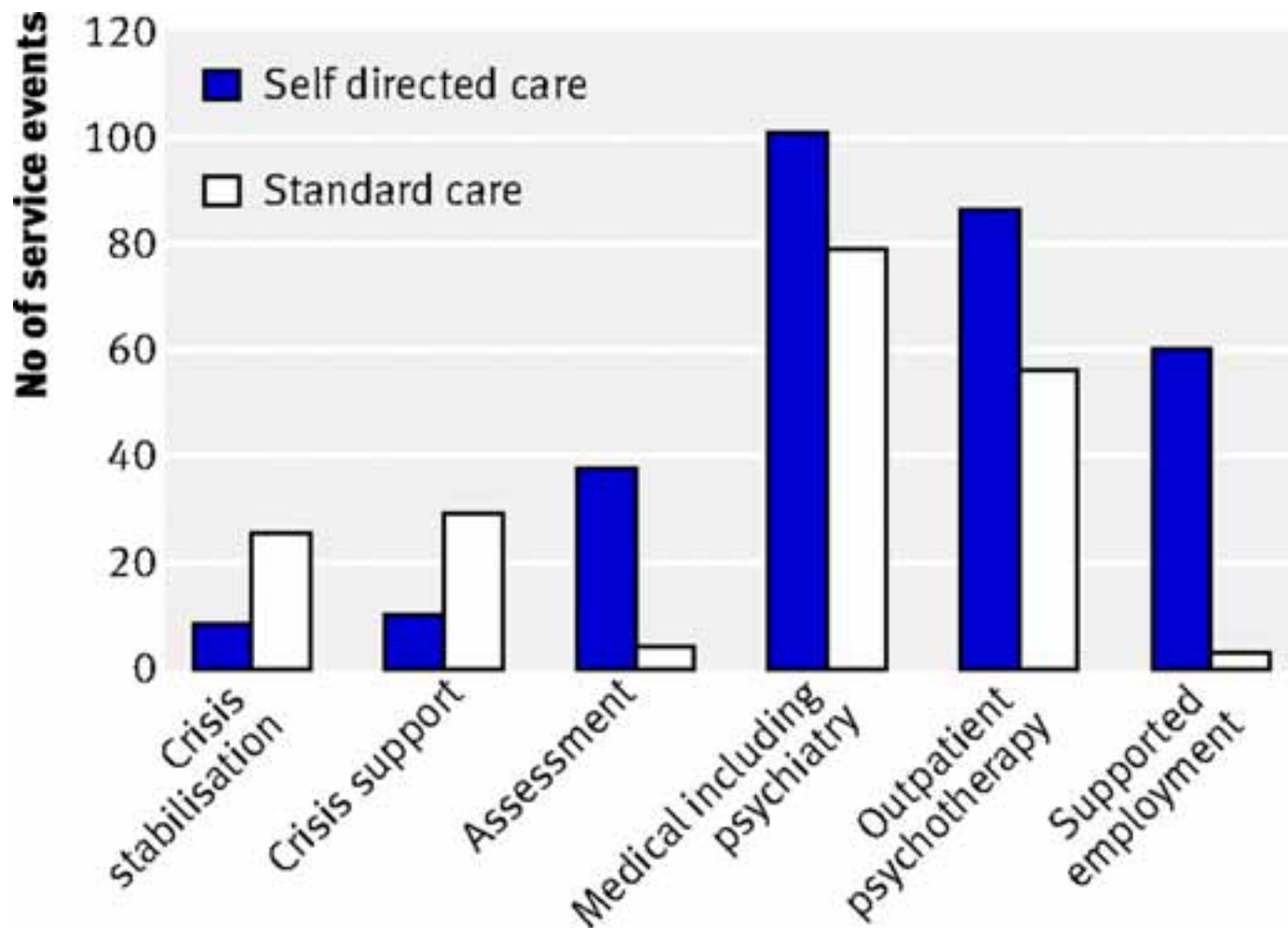
**Vidhya Alakeson Harkness**  
fellow in healthcare policy,  
Office of the Assistant Secretary  
for Planning and Evaluation,  
Department of Health and Human  
Services, Humphrey Building,  
200 Independence Avenue SW,  
Washington, DC 20201, USA  
vidhya.alakeson@hhs.gov  
Accepted: 29 January 2008

**UK social care experience**  
The UK introduced direct payments for social care in 1996 for disabled adults above the age of 16 years, elderly people, and carers of disabled children.<sup>1</sup> The amount of a direct payment can vary from a few thousand to over one hundred thousand pounds depending on the severity of the person's needs.<sup>2</sup> Thirteen local authorities are piloting individual budgets, which go a step further towards integrating support for people needing care by combining six different funding streams into a single budget, with the exception of NHS funding.<sup>3</sup>  
Direct payments and individual budgeting are implemented slightly differently, but the basic approach is

8:27 x 11:02 am

Microsoft | Health Solutions Group

**Fig 1 Rates of service use among 131 participants in Florida self directed care programme and matched sample receiving care through standard channels, 2005-6**



Alakeson, V. BMJ 2008;336:807-809

# Consumers become more responsible for their care

**Microsoft HealthVault**

Home | Add to Favorites | Sign in | [Create an account](#)

## Why is HealthVault important?

Finally, you have a way to control the flow of your family's health information, so it's where you need it, when you need it.

Having a complete, living picture of your family's health — at your fingertips — can help improve the quality of your family's life. Here's how:

- Already a member? [Sign in](#)
- Not a member? [Create a HealthVault account](#)

**YOU AND YOUR FAMILY**

**YOUR HEALTHVAULT ACCOUNT**  
It's individual and FREE, so you can work, and share your health information with this site and doctors.

**HEALTH SEARCH** The new way to search for healthcare articles, Web sites and more resources.

**DIRECT INPUT** Enter your personal information, upload health documents, and create records for members of your family. It's time to digitize the doctor's office "paperwork."

**FAX INPUT** Have your health records need, directly into your HealthVault account. Convert all your paper-based health records into your digital form.

**YOUR HEALTH MANAGEMENT WEB SITES**

- WEB SITES** With your permission, your HealthVault account lets you share your health information with health management Web sites.
- PERSONAL HEALTH SERVICES** Connect a wide variety of HealthVault-compatible services from providers to your PC, and upload the data to your HealthVault account.
- HEALTH PLANS** Add the Personal Health Record information stored at your health plan to your HealthVault account.

**YOUR HEALTH PROVIDER TEAM**

- YOUR DOCTORS** Your online HealthVault provider team — from MDs to Chiropractors — are generating information about your health. You should track a copy of this information so that you can track it with all of them.
- PRESCRIPTIONS** Medications need to be managed and renewed, and if you're in a pinch, HealthVault can collect and keep your medication history.
- IMAGES & LAB RESULTS** Your images (X-Ray, MRI, CAT scans) and lab results may also be a part of your health record, and HealthVault helps you keep copies of them in your account.

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# How can the consumer make a difference?

- By becoming more responsible for their care
- **By changing their definition of value**
- By driving changes in the delivery of care

# Changing the consumer's definition of value

## Now

- Fix me regardless of cost or cause

- Healthcare is a societal right

# Changing the consumer's definition of value

## Now

- Fix me regardless of cost or cause

- Healthcare is a societal right

## Future

- Help keep me well
- Provide appropriate, cost-effective, high-quality care when needed

# Changing the consumer's definition of value

## Now

- Fix me regardless of cost or cause

- Healthcare is a societal right

## Future

- Help keep me well
- Provide appropriate, cost-effective, high-quality care when needed

- Healthcare is a societal right – but available funds must be prioritised across the hierarchy of needs

# Changing the consumer's definition of value

- How do consumers measure quality of healthcare?

# Changing the consumer's definition of value

The screenshot shows the iWantGreatCare.org website in a Windows Internet Explorer browser window. The address bar shows the URL <http://www.iwantgreatcare.org/>. The website has a green checkmark logo and the text "iWANTGREATCARE.org Choose the very best doctor for you and your family".

The main content area is divided into three columns:

- Search for great care:** Includes a dropdown menu for "Specialty", a text input for "Name", and a text input for "Hospital or surgery name". A "Search for great care" button is below.
- Read reviews of a doctor:** Includes a text input for "Doctor", a dropdown menu for "Specialty", and a text input for "Hospital or surgery name". A "Read reviews of a doctor" button is below.
- Help others get great care:** A button labeled "Rate & Review Your Doctor" with a green checkmark icon.

Below the search and review sections, there are three columns of text:

- Great care for...:** Lists "Emergency Medicine" with "Dr William Taylor 100%", "General Practice" with "Dr Anne Wilson 100%", and "Cardiology" with "Dr Nicholas Shroveton 100%".
- What does great care mean to you?:** Lists "Best Listening doctors" with "Dr Paul Wilkinson 100%", "Dr Anne Whalley 100%", "Most trusted doctors" with "Dr Ian Wilson 100%", and "Dr Anne Whalley 100%".
- Today's great Care:** Includes a quote: "Truly understanding of the specific implications..." and a section for "...Not so great" with a quote: "Trust in this Doctor really has gone. He is ...".

At the bottom, there is a "Most recent rating..." section with a quote from "Dr Malcolm Tyson 99%": "Dr Tyson sorts up everything a dr should be. He ...".

The footer contains copyright information: "© 2008 Information for Patients - Doctors - Healthcare Organisations - Charities About | Contact". It also includes a "Terms of Use" section and a "Privacy Policy" section.

# How can the consumer make a difference?

- By becoming more responsible for their care
- By changing their definition of value
- **By driving changes in the delivery of care**

# Consumers will drive change in healthcare delivery

- They will want more convenient, effective and efficient health care providers
- There will be a shift in how, where and who provides preventive, acute and chronic care services

**Deloitte.**

# Medical Tourism

*Consumers in Search of Value*

**Globalisation and health care**

**Operating profit**

Aug 14th 2008 | NEW YORK  
From The Economist print edition

Jonas Bergstrand



**Why put up with expensive, run-of-the-mill health care at home when you can be treated just as well abroad?**

Medical Tourist Alert - Windows Internet Explorer  
 http://www.medical-tourist-alert.com/arendspyl/

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# Medical Tourist Alert

Guide to Medical Tourism Companies, Countries, and Services Worldwide

### Quicksearch

**Work at Home. Make \$25/hr**  
 You can earn a living from home. Start Today. No Experience Needed!  
[FastJobsAtHome.com](#)

**19 Rules to Cut Belly Fat**  
 Lose 9 lbs every 11 Days with these 19 Hot Food Rules of Fat Loss.  
[www.FatLossHacks.com](#)

**Avoid these doctors**  
 Read about and rate your doctor in Canada, UK, and Australia. Free!  
[RateDocs.com](#)

**Tourism Jobs**  
 Find jobs in Tourism, career advice & email alerts at CareerOne!  
[www.CareerOne.com.au](#)

Sunday, February 25, 2007

**Dental Crown in Mexico - \$200, Extraction \$30**  
**Molly McCloy** needed **gun surgery** and 4 **veneers** - \$9000 from a **dentist** in **Philadelphia**, \$6000 from a **Manhattan dentist** for just the veneers, or \$2000 for the veneers from the **NYU dental school** (where she had problems previously) - and "no guarantees".

She also investigated dental spas in **Costa Rica** and **Thailand**, but the cost and convenience of **Mexico** seemed pretty compelling.

So, off she went to **Nogales**. You can read the details at [this](#).

Posted by **Medical Tourist** in [Costa Rica Medical Tourism](#), [Dental and Teeth Care Medical Tourism](#), [Thailand Medical Tourism](#), [Mexico Medical Tourism](#) at 11:02 | [Comments \(1\)](#) | [Trackbacks \(1\)](#)

Tuesday, February 20, 2007

**Eyelid Surgery / Blepharoplasty in India at 20% of the Cost in US or UK**  
 The [Doctors and Health](#) Blog has an interesting article about getting **Blepharoplasty / eyelid cosmetic surgery** in **India** for a fraction of the cost it is 20% of the cost in the **US** or the **UK**.

Posted by **Medical Tourist** in [India Medical Tourism](#), [Cosmetic Surgery](#), [Body Sculpting](#), and [Liposuction Medical Tourism](#) at 11:04 | [Comment \(1\)](#) | [Trackbacks \(1\)](#)

Sunday, February 18, 2007

**\$7000 for Cataract Surgery in US vs. \$1000 in Germany**  
 Its hard to believe the difference - **Cataract Surgery** here in the **US** for \$7000 and in **Germany**, the same surgery by a leading doctor for only \$1000 (plus a trip to Germany for a week - not bad), according to [Jon Lemhard](#).

The article goes on to give the depression and family care statistics about the poor state of health care in the US and the impressive record of medical

### Contact & Support

The definitive guide to medical tourism and medical tourist services and service providers worldwide.

If you have any questions, comments, or additional information about Medical Tourism, please send a note to: info "AT" medical-tourist-alert "DOT" com.

### Categories

- [Medical Tourism And Tourist References](#)
- [Medical Tourism Countries](#)
- [Argentina Medical Tourism](#)
- [Belgium Medical Tourism](#)
- [Brazil Medical Tourism](#)
- [China Medical Tourism](#)

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# Consumers will drive change in healthcare delivery

## Medical Tourism

- The size of the market

# Consumers will drive change in healthcare delivery

## Medical Tourism

- The size of the market
  - Dubai Healthcare City: 30 million patients/year by 2012

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- The size of the market
  - Dubai Healthcare City: 30 million patients/year by 2012
  - 10 million people and \$160 billion in lost annual revenue in US by 2012

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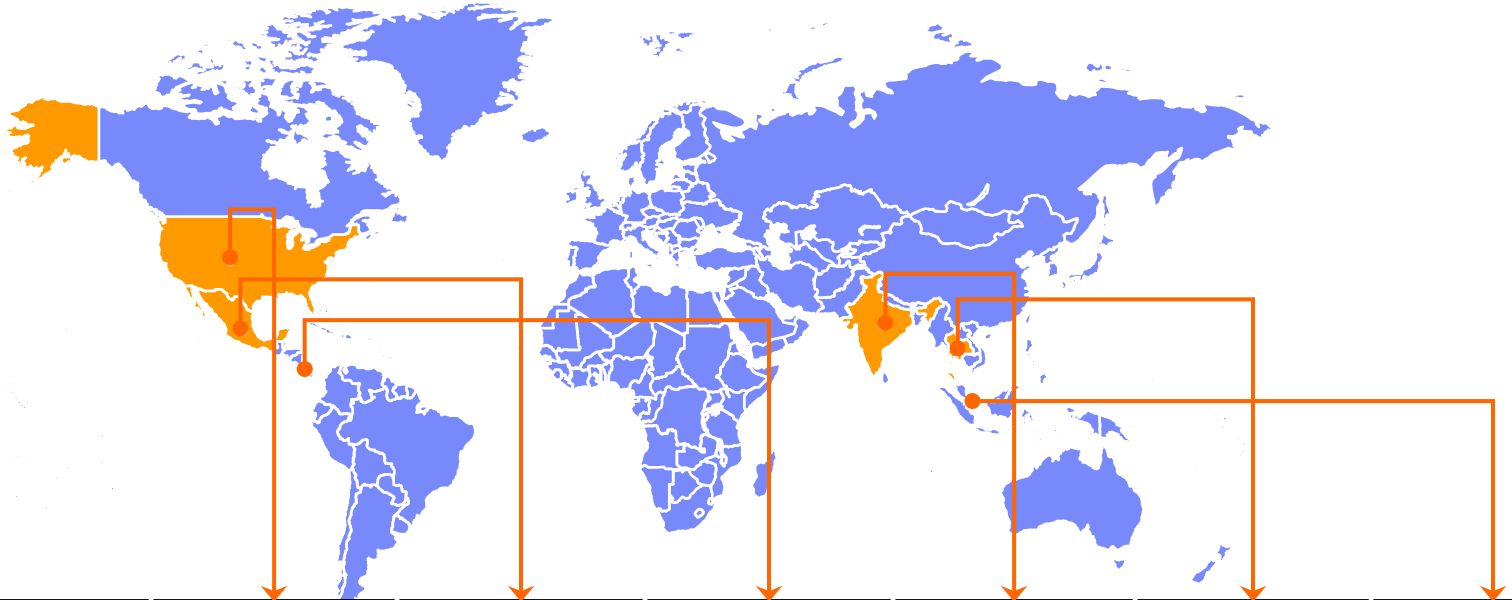
- The size of the market
  - Dubai Healthcare City: 30 million patients/year by 2012
  - 10 million people and \$160 billion in lost annual revenue in US by 2012
- The geographical location

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## Medical Tourism

- The size of the market
  - Dubai Healthcare City: 30 million patients/year by 2012
  - 10 million people and \$160 billion in lost annual revenue in US by 2012
- The geographical location
- The prices

# Consumers will drive change in healthcare delivery



Procedure	United States	Mexico	Costa Rica	India	Thailand	Singapore
Angioplasty	\$33,000	\$13,125	\$14,500	\$7,800	\$9,200	\$12,500
Heart bypass	\$37,000	\$14,400	\$13,600	\$6,650	\$11,000	\$13,500
Hip replacement	\$45,000	\$9,400	\$13,000	\$6,500	\$8,000	\$9,000
Knee replacement	\$21,000	\$10,500	\$9,500	\$6,500	\$8,500	\$10,000
Laparoscopic hysterectomy	\$19,000	\$4,275	\$6,500	\$2,238	\$4,500	\$4,500
Laparoscopic prostatectomy	\$27,500	\$16,800	\$11,500	\$5,900	\$9,500	\$16,000

Source: PlanetHospital

Note: Prices do not account for travel or accommodations costs. Expenses can also increase if there are complications with the procedure. United States rates reflect Medicare reimbursements for hospital services but not for medications or anaesthesia.

# Bumrungrad Hospital

- 554 beds, 19 operating theatres
- First hospital in Asia to receive the US-based Joint Commission on International Accreditation
- Over 1,200,000 visits per year with 400,000 foreign patients
- 2500 – 4000 outpatients a day, 7 days per week, 365 days per year
- 295,000 Radiology studies per year



# Bumrungrad's CEO says...

- “We see 2 to 3 times more outpatients than most US hospitals, move them through the system roughly 4 times faster than a typical US hospital and charge 90% less.”

# Consumers will drive change in healthcare delivery

## Medical Tourism

- The size of the market
  - Dubai Healthcare City: 30 million patients/year by 2012
  - 10 million people and \$160 billion in lost annual revenue in US by 2012
- The geographical location
- The prices
- Quality

# Consumers will drive change in healthcare delivery

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- The size of the market
  - Dubai Healthcare City: 30 million patients/year by 2012
  - \$162 billion in lost spending in US by 2012
- The geographical location
- The prices
- Quality
- Staffing: it could be a good thing

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  - Dubai Healthcare City: 30 million patients/year by 2012
  - \$162 billion in lost spending in US by 2012
- The geographical location
- The prices
- Quality
- Staffing: it could be a good thing
- The infrastructure
- A disruptive force

# The consumer.....the final hope?

- Healthcare providers haven't been able to solve the problems
- Healthcare payers haven't been able to solve the problems
- Will the consumer have more success?

# The democratisation of healthcare

- The problems of healthcare
- What's going to happen in the future?
  - Providers
  - Payers
- The rise of the consumer
- **Conclusion**

A diverse group of healthcare professionals, including a woman in blue scrubs in the foreground and several others in white coats and scrubs in the background, standing in a hospital hallway. The scene is brightly lit and conveys a sense of a modern, collaborative healthcare environment.

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