

(non) Profitability in Healthcare

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From For-Profit to For-Value: A Journey to a Sustainable Healthcare Model

Louise Knight, Esmee Peters, Frederik Vos, Steven Borobia

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Healthier at Home: The New Era of Healthcare



Healthier at Home: The New Era of Healthcare

The global healthcare market is entering a new era of radical growth in preventative, personalised treatments that maximises positive health outcomes and system resilience. At the heart of this opportunity is shifting the site of care – often to home and community settings.

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Healthcare and Life Sciences Expert | PA Consulting

Healthcare systems the world over face relentless pressure and increasingly complex health requirements. ‘Healthier at home’ solutions, whether stand-alone therapeutics, digital devices, or behavioural prompts, have the potential to alleviate demand, improve health equity, and increase patient quality of life. They also offer a huge economic opportunity. In 2022, \$44 billion was invested in global healthcare innovation – double that of the previous year. This upward trend is set to continue. [Our research](#) suggests that by 2030, the global market for solutions that shift the site of care will increase to \$390.4 billion.

We surveyed 550 leaders across the global healthcare, MedTech, and pharma landscape, discovering huge enthusiasm for new care pathways and solutions that keep people healthier at home. Global MedTech and pharma leaders will commercialise 25% more hospital-to-home solutions in 2027 than today, and 72% of global healthcare leaders are currently prioritising the development of at-home solutions. But, despite the enthusiasm, 65% of respondents cite MedTech and pharma’s lack of understanding of healthcare systems and pathways as a key barrier to change. Motivation is another core challenge – global healthcare leaders say that only one-third of clinicians are motivated to shift

key points

- ‘Healthier at home’ solutions include stand-alone therapeutics, digital devices, or behavioural prompts.
- These solutions have the potential to alleviate demand, improve health equity, and increase patient quality of life.
- Delivering hospital care in the home requires target groups to be engaged before design and throughout the iteration.
- Keeping people healthier at home drives value on both an economic and social scale, improves patient outcomes, reduces demand, and drives health equity.

the site of care, rising to just 40% in the next five years. Without clinician backing, the reality of adoption stands to fall short of ambition.

So, what needs to happen to bridge the gap between expectation and reality and create a world where people stay healthier at home?

Connect the Ecosystem

Global survey respondents recognise the importance of collaboration, with 70% predicting that MedTech and pharma companies will become trusted partners to healthcare in the delivery of connected solutions.

Successful collaboration starts with working out what change will impact who and how. When co-designing products and services, stakeholders should think beyond the product. Instead, the focus should be on people and processes and the right software wrappers and service propositions to guide behaviour.

For example, Argenti, our technology-enabled care solution, provides advanced, automated, 24-hour support to those in need, connecting care workers to service users for better, more efficient care. By focusing on outcomes and co-designing solutions based on people’s needs, we were able to use technology as a

safety net, helping people live normal lives and stepping in when they needed more support. Real-world data and evidence from pilots can help to build a compelling case for investment in future planning. From here, stakeholders can work together to define the desired endpoint and understand the consequences of each change. Getting this right gains buy-in from the clinical community, providing them with the evidential data to underpin risk-based decision support.

Deploy Digital With Intention

Digital solutions are increasingly central to at-home care. They can empower patients to understand and self-manage conditions, providing relevant information or connecting them to wider support networks. Digital solutions also gather invaluable data. For example, we partnered with Cumulus to support the treatment of long-term neuro-degenerative conditions like dementia, creating a medical-grade electroencephalogram (EEG) monitoring platform to record and analyse patients' brain

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Differentiate Through Experience

Patients and professionals need their care experience to be as simple, safe, and positive as possible, tailored to individual needs. Patients are increasingly influential – their attitude towards solutions drives adoption. Delivering hospital care in the home requires target groups to be engaged before design and throughout the iteration. This is how the most appropriate and convenient solutions are created. Take Viscero, an ECG T-shirt that provides continuous, diagnostic-quality data for those with abnormal heartbeats, delivering insights to improve clinical outcomes. Users simply wear the T-shirt and go about their lives. This was developed specifically with patient experience in mind, with the intention of replacing the need to be wired to fixed equipment in a clinical environment.

To be successful, however, many other stakeholders must be accommodated. Clinicians might need solutions that provide timely, well-presented data, instilling confidence in less familiar approaches. Family members might be more supportive if they are intentionally involved in the flow of information. Hospitals will appreciate systems that integrate seamlessly without increasing complexity. The solution must work for everyone. It comes back to collaboration and understanding.

activity at home. These insights were then used for critical clinical trials.

However, while 65% of global respondents agree that increased real-world data availability is a significant advantage of shifting the site of care, there is tension between access and privacy. This is a practical challenge as well as one of perception. Carefully managing data in line with regulatory requirements and best practices can ease difficulties. Defining risk parameters and responsibilities is crucial and emphasises the importance of collaboration.

Meanwhile, not everyone wants to or is able to access digital-led solutions. It's important to focus on equity, not 'one-size-fits-all', and provide the right support, alternatives and infrastructures.

Unlock Whole System Value

Keeping people healthier at home drives value on both an economic and social scale. The majority of global respondents believe hospital-to-home solutions will positively affect society's health and well-being, vastly improve community health and happiness, and save patients time and money. To unlock whole system value, ecosystem stakeholders need a common understanding of value centred on health equity and shared incentives rather than cost alone.

Our research confirms the importance of prevention and early intervention, with 96% of respondents saying patients will be so focused on preventative care and early intervention that many hospital visits will be unnecessary. The proactive model is gaining traction, steadily replacing reactive care. Medtronic's diabetes monitoring system, for example, pre-empts hypoglycaemic attacks by assessing patients' biomarkers against wider data trends and population statistics.

Many healthcare systems are shifting the emphasis to value-based care, an outcomes-based model that rewards the successful treatment of the patient. This can be measured using various metrics, including Quality-Adjusted Life Years (QALY), re-admissions,

and population health management (PHM) data. These insights can be used to design proactive models of care and address health inequalities at the system and individual levels.

Keeping people healthier at home can improve patient outcomes, reduce demand, and drive health equity, benefiting patients and professionals while delivering a return on investment for MedTech and pharma providers. By focusing on these accelerators, ecosystem stakeholders can open up market opportunities and create a win-win model that delivers value for all.

Conflict of Interest

None. ■