



Healthcare and Life Sciences Predictions 2020

A bold future?

David Hearn, Head of
Deloitte Consulting

17 April 2015



What we know today and estimate about tomorrow

Our industry is changing quickly



Meet the Over 65s –

10% of the global population



Global pharmaceutical spending increase by

6.9% a year



Growth in healthcare 2.4% to 8.7%



Developing markets 23% to 32%

Health consumers

2020

- Better informed
- Genetic profile
- Social media
- Expectations
- Prevention



Today

- Genome
- Electronic health records
- Video
- Smartphone App

Healthcare delivery systems

2020

- Home & community
- Technology
- Virtual
- Hospital reserved
- Robotic
- 3D printing



Today

- Electronic Healthcare Records
- “Patients know best”
- Retail outlets
- AI & 3D examples

Wearables and mHealth

2020

- Wearables
- Comprehensive view
- Widespread
- New partnerships
- Self management & prevention



Today

- Venture funding
- mHealth market
- Over 100,000 health Aps

Big Data

2020

- A national infrastructure priority
- Personalised treatment
- Improving outcomes and productivity



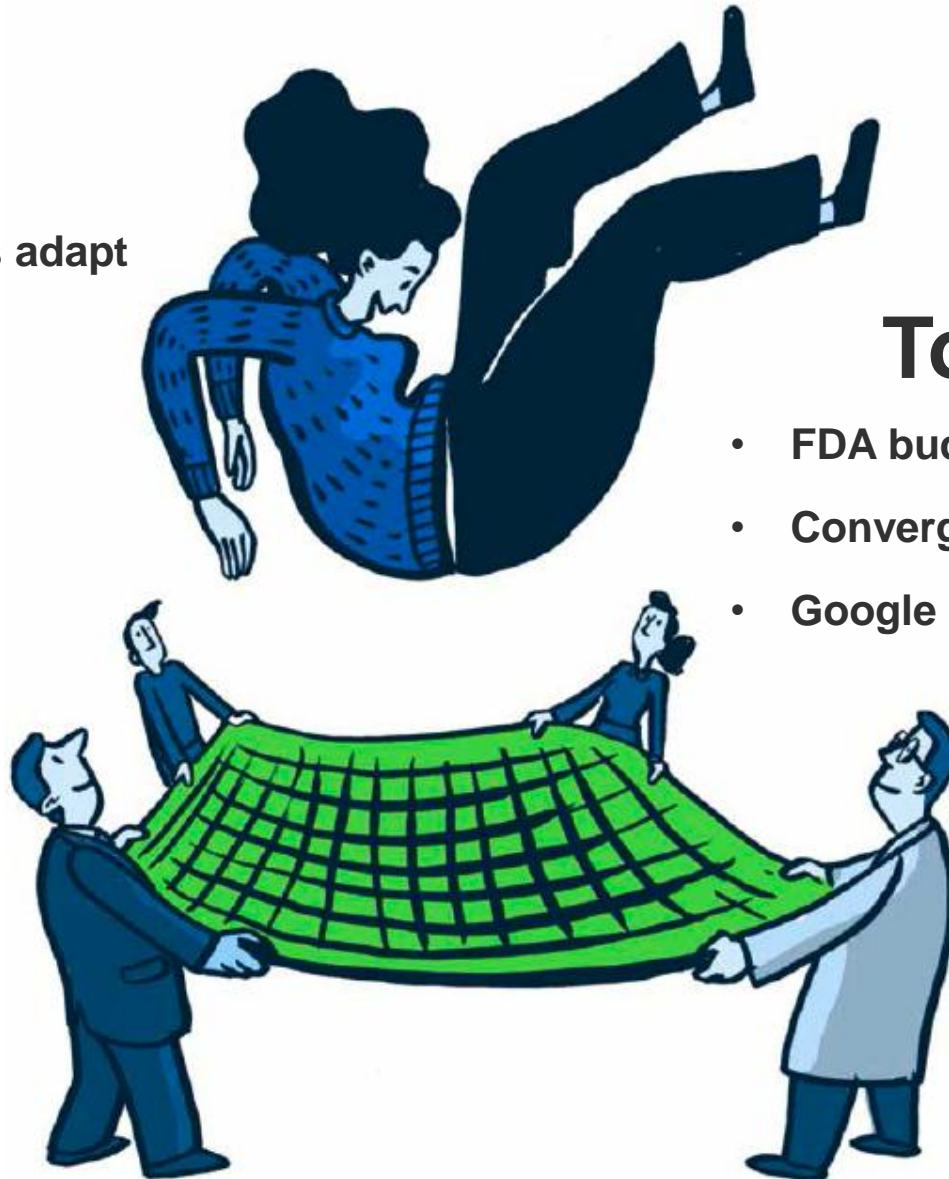
Today

- Supply of data from EMR, mhealth
- Big Data technologies
- Genetic counselling and testing

Regulatory compliance and patient safety

2020

- Regulatory agencies adapt
- Data driven
- Encourage innovation



Today

- FDA budget and staff
- Convergence
- Google

Research and Development

2020

- The networked laboratory
- Partnerships
- Distributed
- Disease biology and genetics
- Cost of care



Today

- Two thirds of drugs launched were partnerships
- New models of R&D

Pharmaceutical commercial model

2020

- Shift from volume to value
- Sales reps are medical educators
- Multi Channel Marketing
- Outcome based



Today

- Sales reps restricted
- US rep numbers down 8% (2011-12)
- J&J Innovation centre

The pharmaceutical enterprise

2020

- Single, global organisation
- Global business services
- Real time, integrated data
- Mobile, technology enabled workers



Today

- GBS Adoption
- Virtual HR solutions
- Cloud

Corporate reputation

2020

- Repairing negative corporate reputation
- Inclusive
- Transparent



Today

- Patient survey: 2013
- Ethical marketing 26%
- Integrity 25%

www.deloitte.com

This is an internal document which provides confidential advice and guidance to partners and staff of Deloitte LLP and its subsidiaries. It is not to be copied or made available to any other party.

© 2015 Deloitte LLP. All rights reserved.