

Ecosystem for Patient-Centric Healthcare

CEO Forum

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Recap: Healthcare ecosystems are one of the core trends shaping healthcare globally

Deep dives follow



Demographics and an aging population



Digital and digitization in care



Inflationary & regulatory pressure; supply chain disruption



Acceleration of trends by COVID-19 pandemic



Retailization and outsourcing of care



Workforce challenges

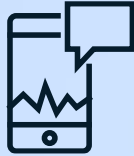


Value based care



Shift to alternate, non-acute sites of care

Changing global supply and demand side trends are creating customer-centric ecosystems across industry boundaries



New technological developments

More connected: Wide-reaching digital connectivity of individuals and devices (IoT) and new technology paradigms (APIs, micro-services)

Cheaper: Massive cost reduction for computing power / data storage (incl. cloud) reducing marginal costs in digital services

Smarter: New analytics approaches (e.g. AI / deep learning) as basis for business models that lead to data as the primary economic currency



Gradual appearance of customer-centric ecosystems of services across industry boundaries



Changing customer demands

Customer-centric: Higher expectations for seamlessly integrated, value-adding services with satisfactory customer experience

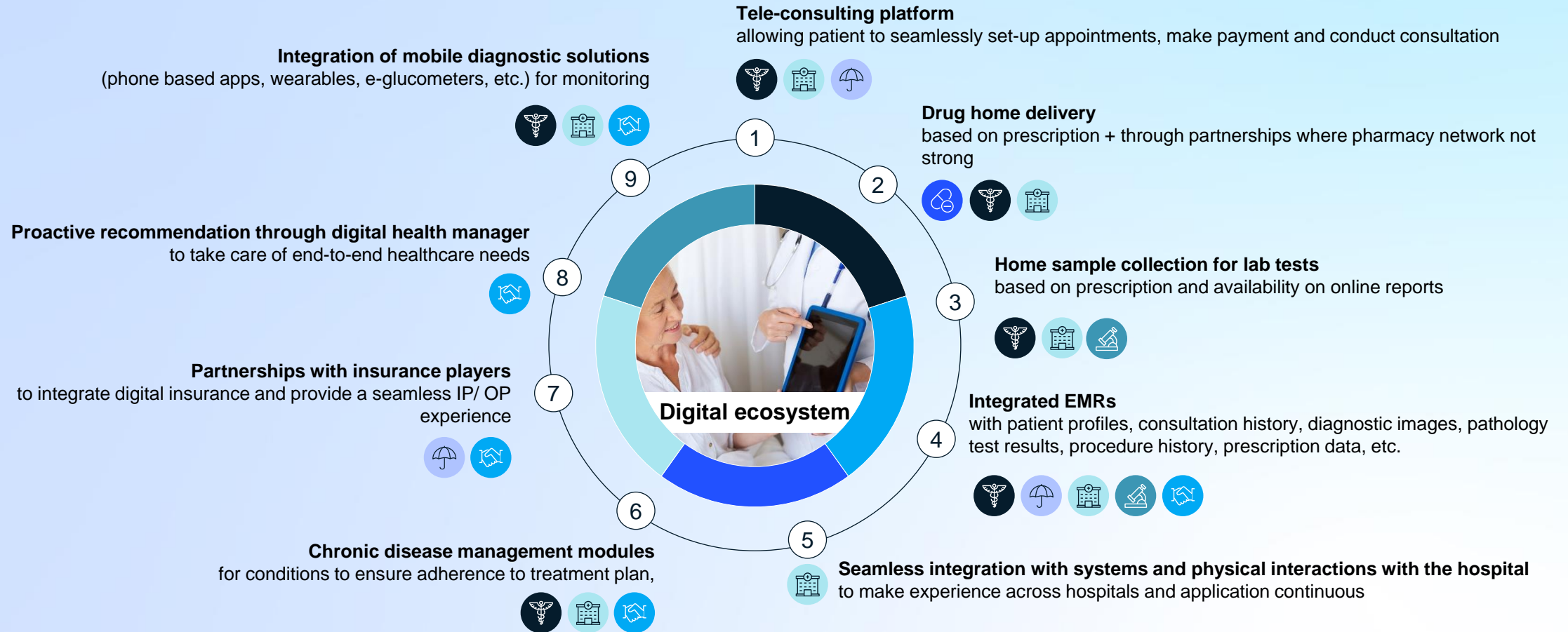
Ubiquitous: Higher struggle for attention due to increasingly faster amount of content creation across industries

Personalized: Higher willingness to provide data for better/ free services (while basic data security/protection is ensured)



Health will be one of these ecosystems, integrating several touchpoints to ensure a seamless customer experience

Illustrative



Ecosystems for more patient centric healthcare are emerging as opportunities to capitalize on advances made during the pandemic



Ecosystems will be the way to deliver healthcare in the future, like trends in other sectors



Significant evolution in customer-centricity is driving this push, and the trend **has been accelerated** by 5-10 years due to Covid-19



This has potential to **fundamentally change the way healthcare is delivered** with

- **Patient at the center** and
- **Disruptions in traditional patient flows** and decision making



This would also help healthcare players **unlock value across the value chain** addressing traditional challenges (e.g., primary care as a feeder, insurance)



Lots of different actors are exploring healthcare ecosystems, not only those from healthcare – it becomes imperative to explore healthcare ecosystems to keep abreast

Both traditional and non healthcare players are building ecosystems

	Health insurance	Care providers	Non-healthcare players
Ecosystem purpose	Cost reduction , avoiding and reducing healthcare expenditure	Revenue increase for core business and new revenue streams	New revenue streams outside core business
Relevant players	 	 	 
Impact	<p>Ping An is an integrated patient-provider-payment network with 300M+ users</p> <ul style="list-style-type: none"> Grew from 40K consults per day in 2015 to 903K per day in 2020 Started with Second opinion use case and AI doctor Scaled up corporate healthcare Integrated offline-online in 2020 <p>USD ~8-9B valuation; created 20% per annum growth for Ping An core business</p>	<p>Apollo is India's fastest growing omni-channel health ecosystem that achieved 20M+ users in 24 months</p> <ul style="list-style-type: none"> 5 services launched in 6 months Very lower customer acquisition cost Omni-channel health records High quality VC, integrating with hospital care continuum <p>40-50k daily transactions from users; 3-4x jump in valuation of overall business</p>	<p>Tencent is China's largest booking platform for private doctors with 220M+ users</p> <ul style="list-style-type: none"> Integrated with WeChat >440,000 registered doctors Integrated with 2,700+ hospitals Health insurance products via partnerships <p>36% increase in revenues from value-add services enabled by ecosystem</p>

What are the implications for the Philippines?

- ① Do you see any trends linked to healthcare ecosystems in your business?
- ② How are you reacting to these shifts?

