

“The Healthcare Revolution for Efficiency and Customer Centricity - with open information in the driving seat”

Johan Hjertqvist, Founder & CEO
Health Consumer Powerhouse
Healthcare Executive Circle
Helsinki , Feb 3, 2011

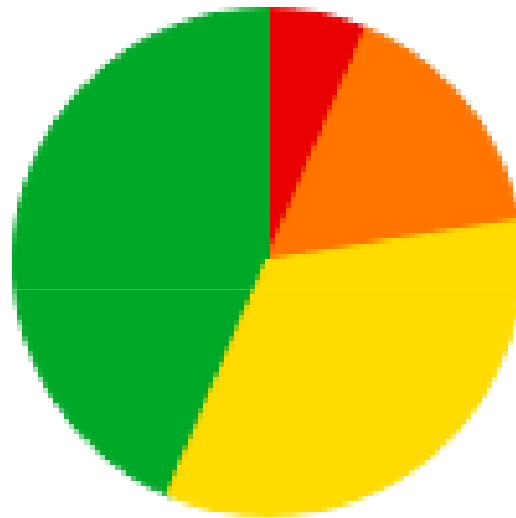
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Revolutions start here

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Side effects from a certain medication, as viewed through self-reporting by fellow patients (ill: www.patientslikeme.org)

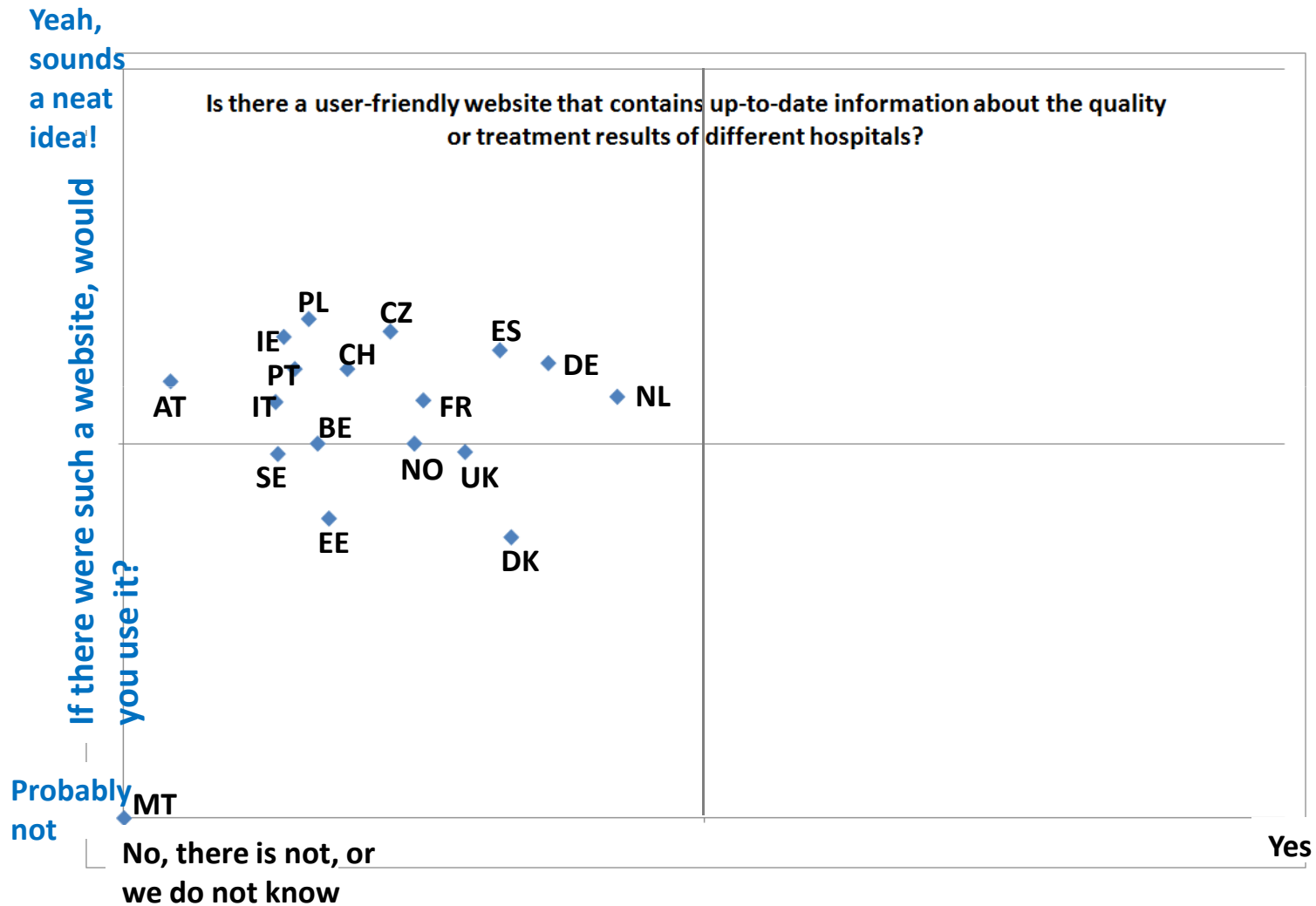


Severe	<u>43</u>
Moderate	<u>108</u>
Mild	<u>228</u>
None	<u>293</u>

Hälsoval-index Malmö våren 2009

Delgren	Enkät	Ärlöv	Bokskogen	Bunkelöstrand *	Capio Cityklinikerna (3 st)**	Curakliniken	Derbykliniken	Eden	Ellenbogen *	Granen	Gullviksborg	Hindby	Husläkare Thomas Nordlund AB	Kirseberg	Kroksbäck	Limhamns läkargrupp	Limhamns vårdcentral *	
Tillgänglighet	Öppetider vardagar	○	●	○	○	○	○	●	○	○	i.u.	i.u.	○	○	○	i.u.	○	
	Öppet på helg	○	●	○	○	○	○	●	○	○	i.u.	i.u.	i.u.	○	○	i.u.	○	
	Hembesök	●	●	○	●	○	●	●	●	●	●	●	●	●	●	●	○	○
	Drop in	●	●	●	●	●	●	●	●	●	●	●	●	●	○	○	○	○
	Telefonsvar av levande personer	●	●	●	●	●	●	●	●	●	●	●	●	●	○	○	○	○
	Boka återbesök !!!	●	○	●	●	●	●	●	○	○	●	●	●	●	●	●	●	●
	Viktad delpoäng	10	11	9	10	9	9	13	9	10	10	10	10	9	10	9	9	9
Information	Egen hemsida	●	●	●	●	●	○	●	●	●	●	●	○	●	●	●	●	●
	Nöjdkundundersökning	i.u.	●	●	●	●	○	i.u.	●	●	●	●	○	●	●	●	●	●
	Tema-träffar	i.u.	●	●	●	○	○	i.u.	i.u.	●	●	●	○	○	○	○	○	○
	Inbjudan årlig kontroll	i.u.	●	○	○	i.u.	○	i.u.	i.u.	●	●	○	○	○	●	●	○	○
	Inbjudan influensavvaccin	i.u.	●	●	○	i.u.	○	i.u.	i.u.	○	○	○	○	i.u.	○	○	○	○
	Inbjudan uppföljning	i.u.	●	●	○	i.u.	○	i.u.	i.u.	●	●	●	○	●	●	○	○	○
	Viktad delpoäng	6	15	13	10	7	5	6	8	13	13	12	5	12	12	8	13	
Säkerhet	Utvecklingsdagar	i.u.	●	○	○	●	○	i.u.	●	●	●	●	○	●	○	○	○	○
	Korta ärmar på läkarrock	i.u.	●	●	○	●	○	i.u.	●	●	●	●	○	●	●	○	○	○
	Handsprit	i.u.	●	●	●	i.u.	●	i.u.	●	●	●	●	●	●	●	●	●	●
	Avvikelse rapport	i.u.	●	●	●	○	○	i.u.	i.u.	●	●	●	○	●	○	○	○	○

Results from EU survey



The missing link

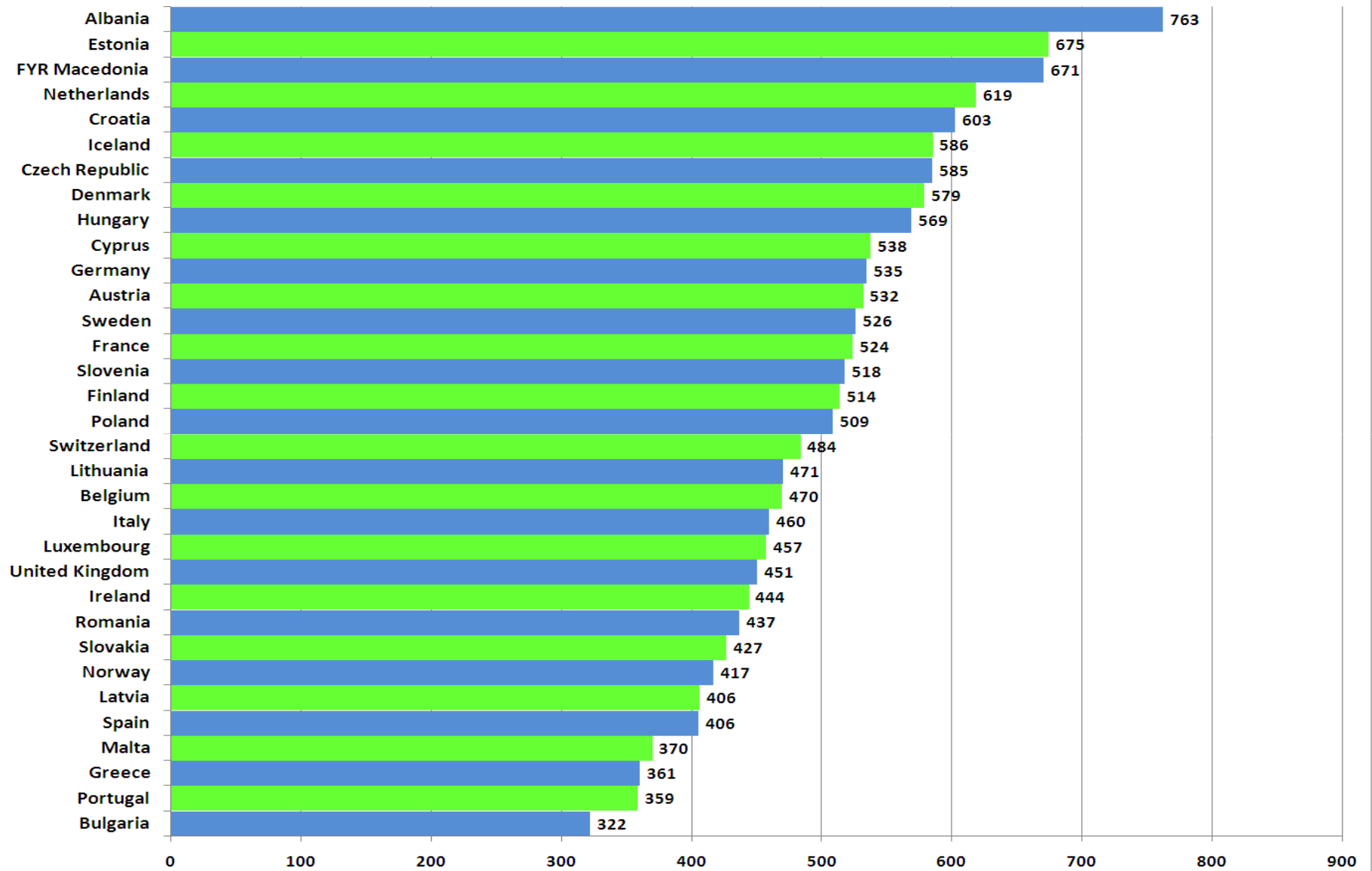


New mindset



"Wisdom of the crowd"

Bang-for-the-Buck scores in Euro Health Consumer Index 2009



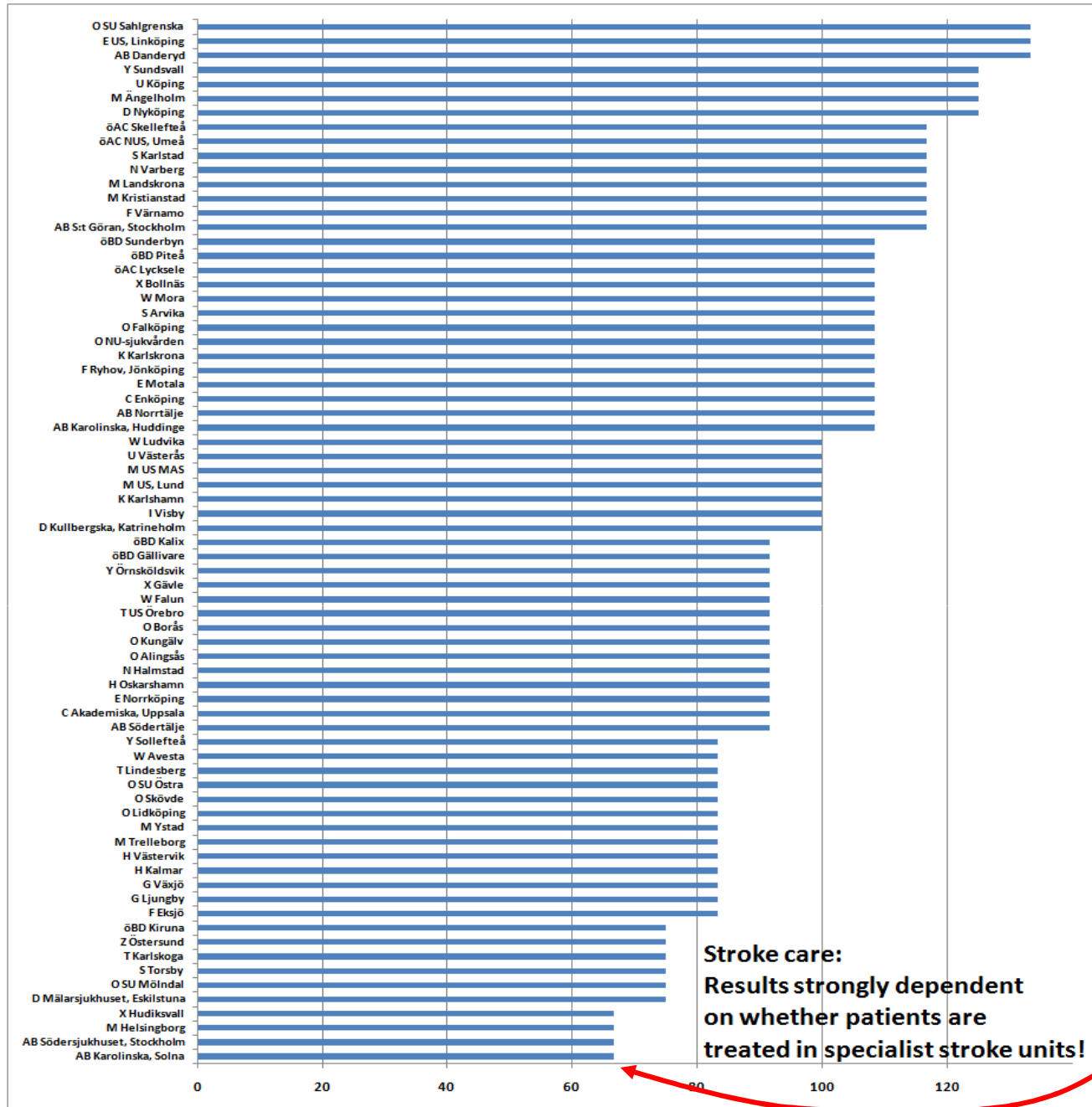
New EU cross-border healthcare directive

- **Free movement of citizens and services**
- **No revolution – but a big step forward**
- **Foundation for legal clarity**
- **A pressure on national healthcare systems performance**
- **Government obligations to deliver open user information:**
 - **What does healthcare in Finland offer?**
 - **Quality systems, patient safety procedures**
 - **Price?**



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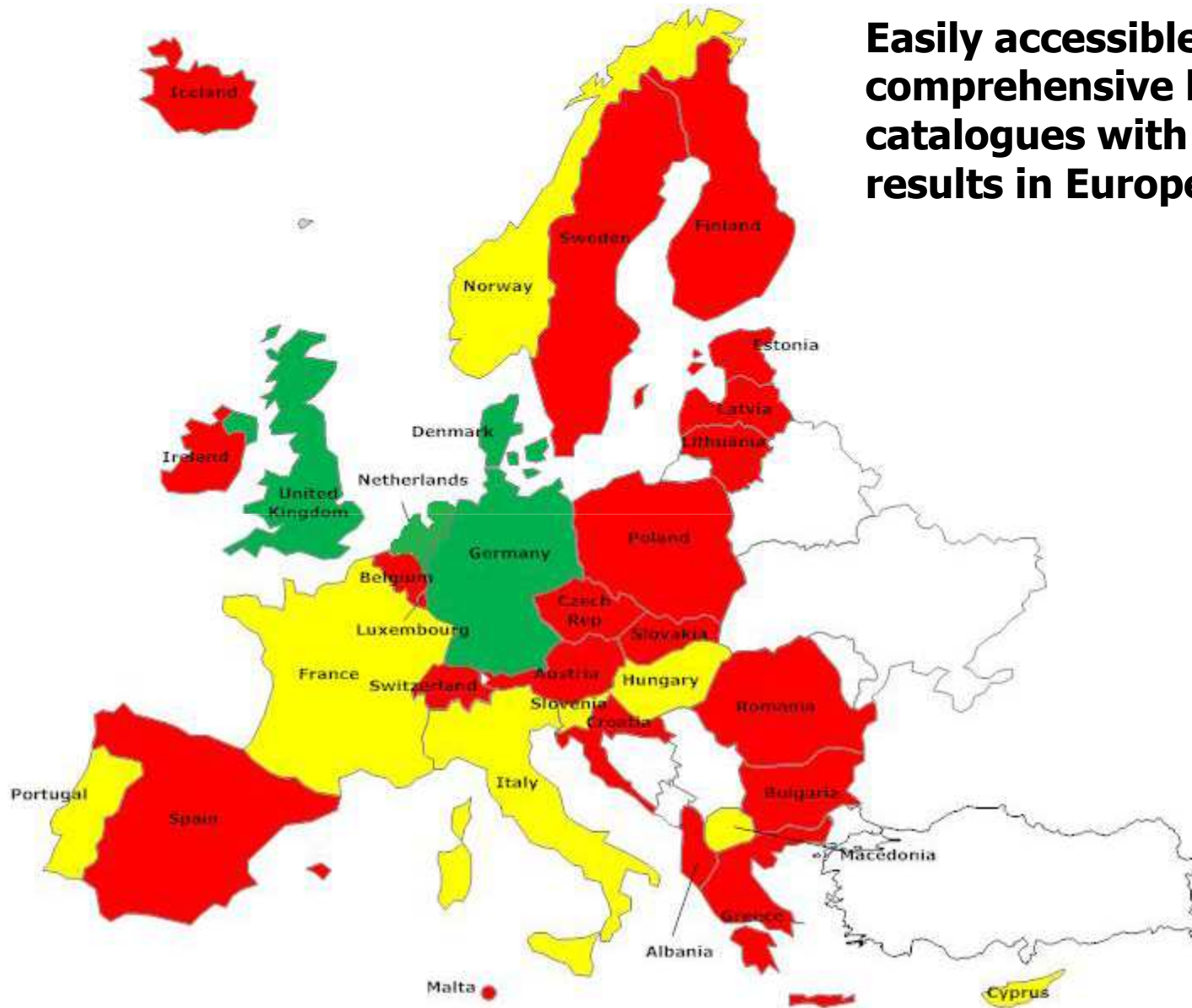
Broken down by disease area: The varying quality of stroke care across Sweden



Stroke care:
Results strongly dependent
on whether patients are
treated in specialist stroke units!

OUCH! That is the
most famous hospital
in the land!

Easily accessible and comprehensive hospital catalogues with medical results in Europe (2010)

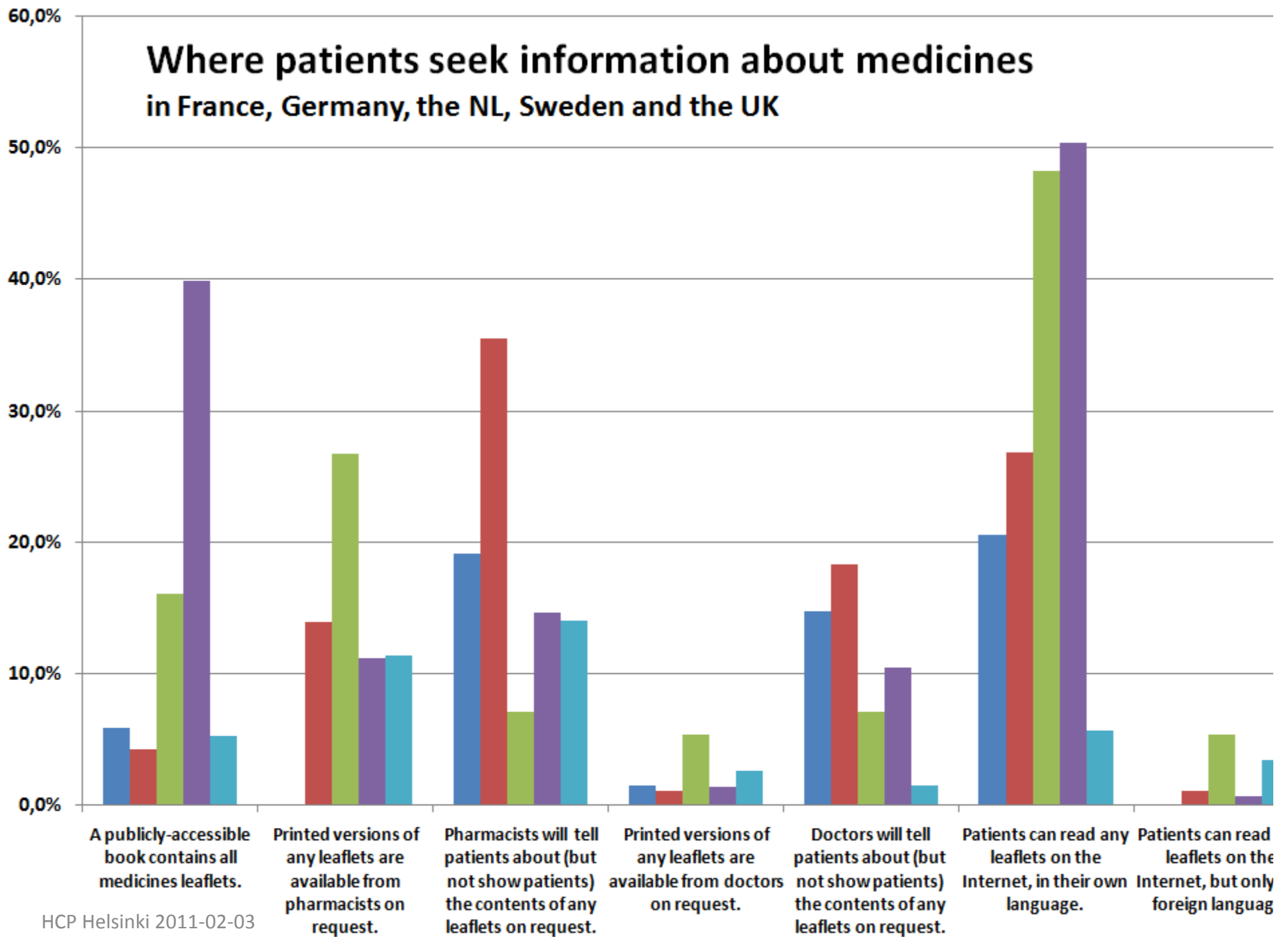


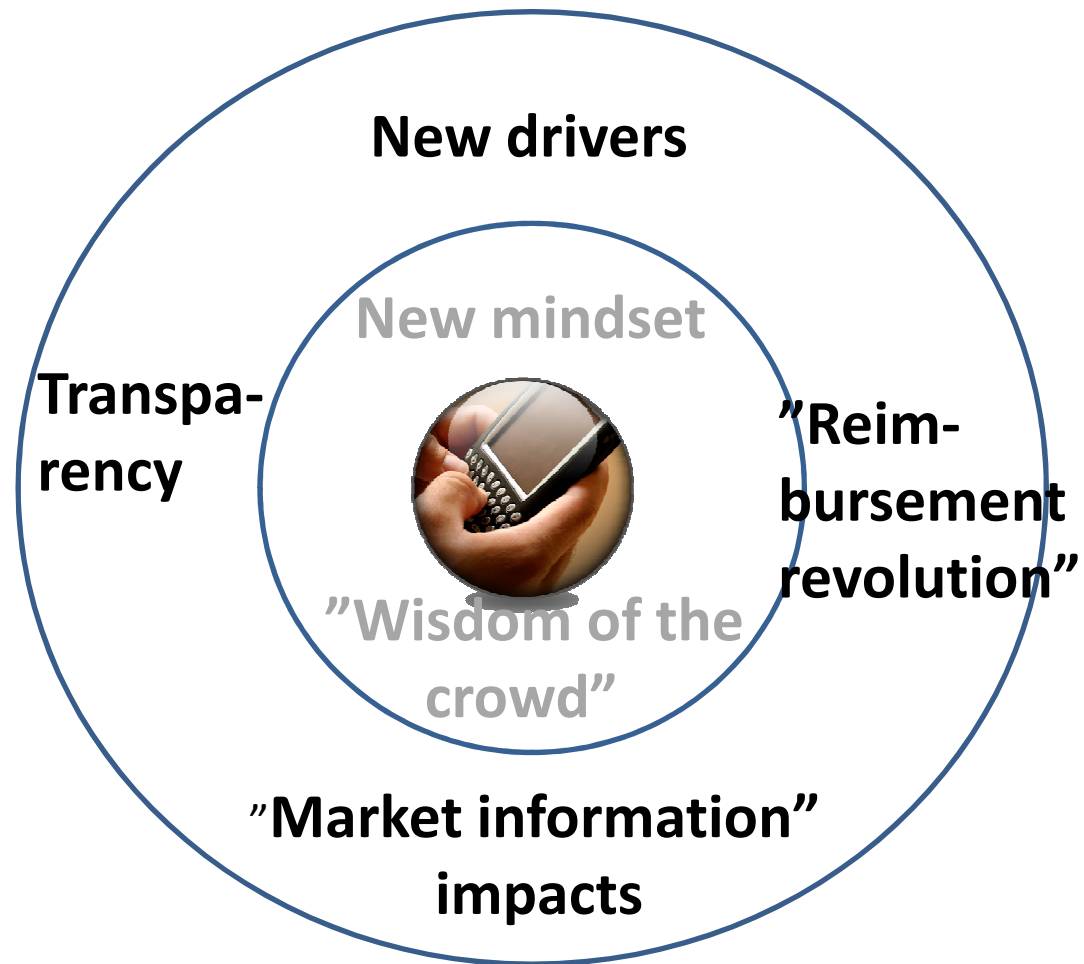
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Where patients seek information about medicines in France, Germany, the NL, Sweden and the UK





Quality failure costs

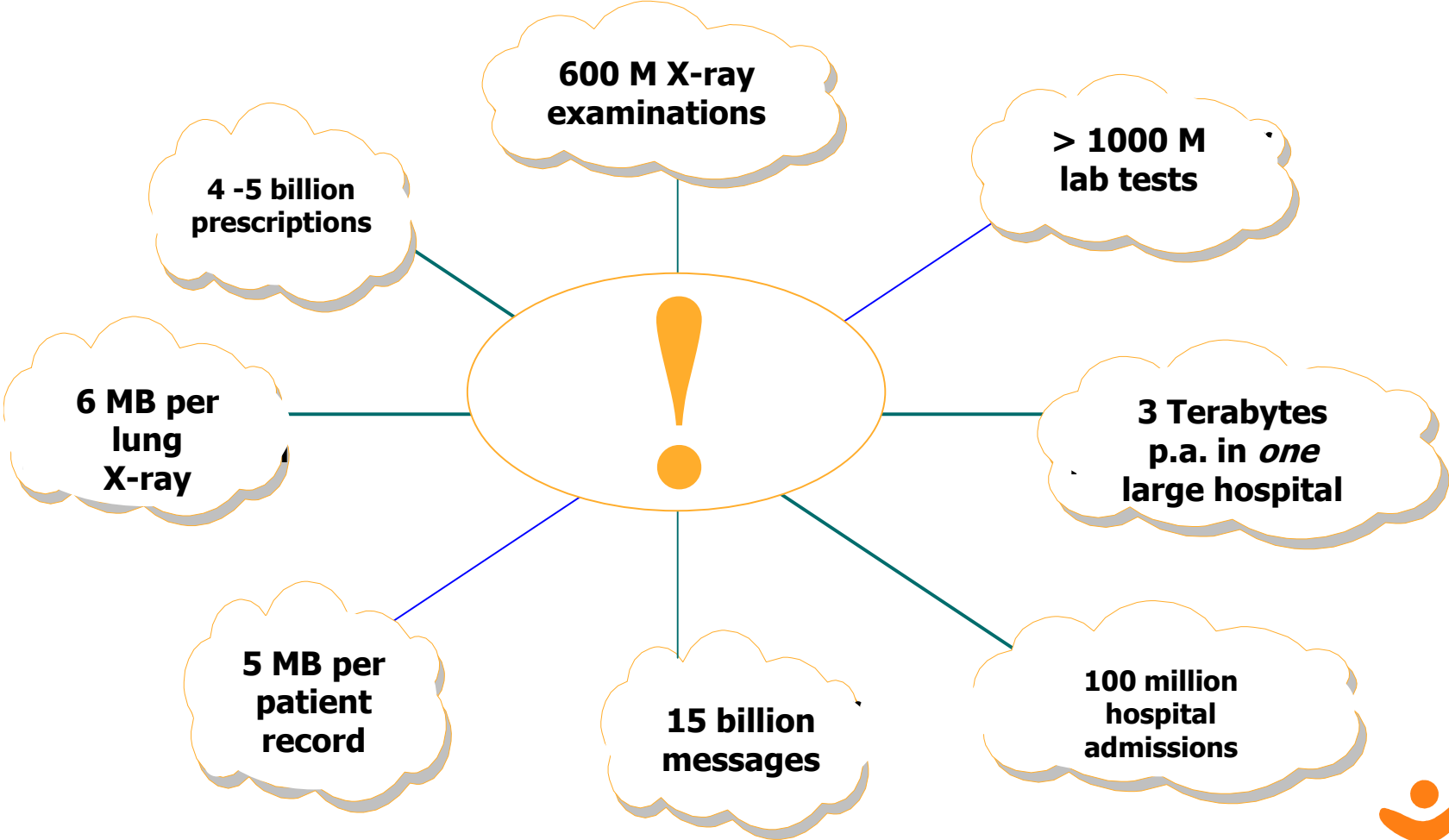
- **Waiting – “fussy math”**
- **Silos**
- **Infections (EU 2010):**
 - 16 million extra days of hospital stay per year
 - 37 000 attributable deaths per year (and contribution to an additional 110 000)
- **Treatment failures (UK 2002): £2 billion a year in hospital stay alone, over £400 million in clinical negligence settlements**
- **Lack of adherence – medicines: every second prescribed medicine not used as intended**
- **“Clash of cultures”.**

What do you do when payors awake?

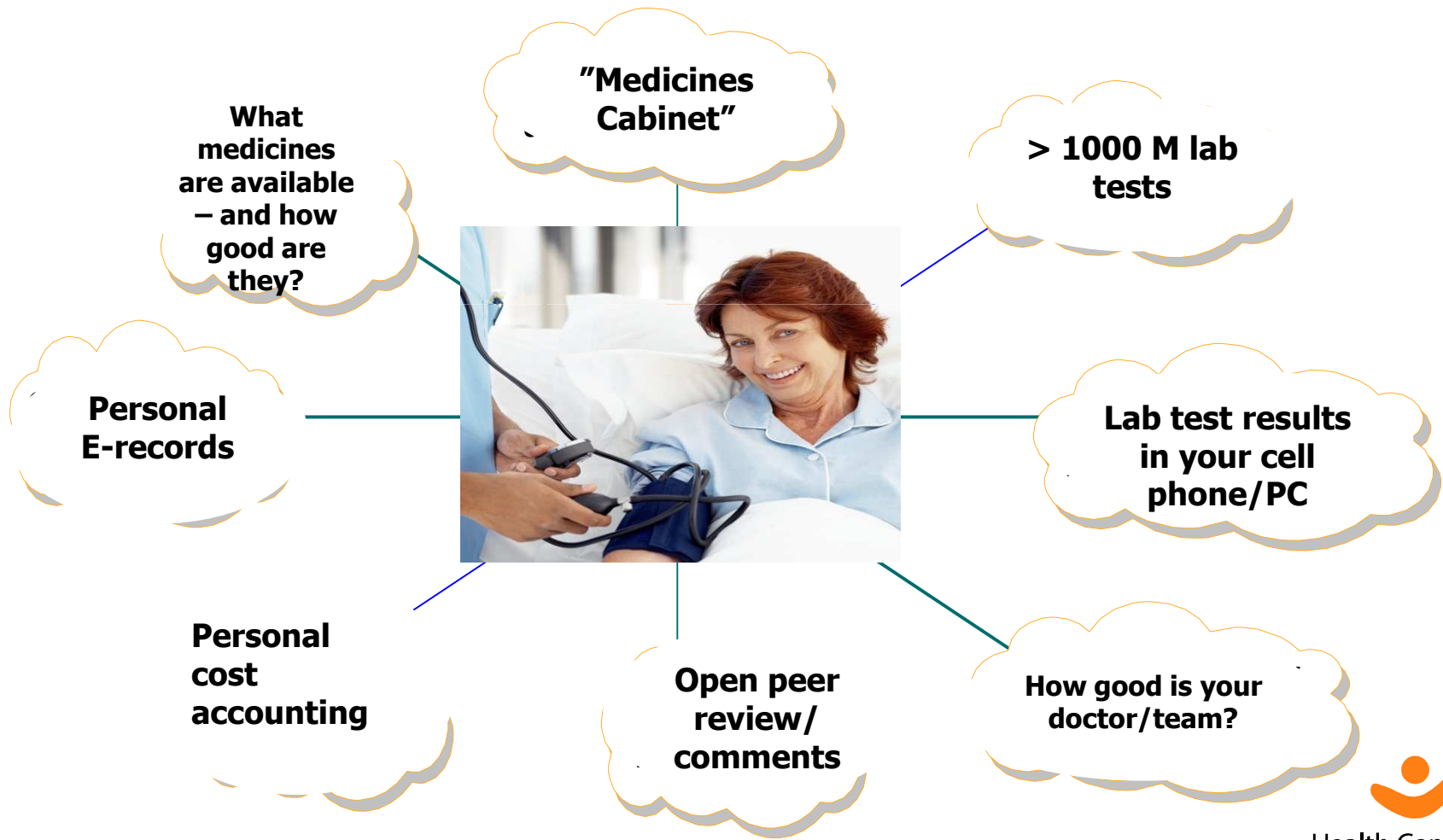
- ☺ **“Now that we learn about the quality gaps, we will pay only for healthcare that is good enough”**
- ☺ **The patient is an income – not a cost**
- ☺ **Separation of funding and production?**
- ☺ **Global grants replaced by pay for performance?**
- ☺ **Cost/price transparency reveals a lot**
- ☺ **Outsourcing, new production logics?**



Healthcare is incredibly information intensive



Healthcare is incredibly information intensive - patient interface and interaction necessary



A different logic – co-production of value

- **Turn the pyramid upside down: Involve patients/customers!**
- **Interaction with customers a key driver for improvement in most other services**
- **Reduce administrative work: booking on line**
- **Patient security: self-reporting of adverse events, patient-driven manuals, adherence programs**
- **Quality assurance: patient opinions on food, services etc.**



Far from a "tsunami"

- **The ageing of Europe forecasted since the Korean war**
- **Accelerating structural needs**
- **Chronic illness a "normal" condition**
- **Lifestyle change**
- **Radically improved prevention**
- **Full personal commitment and engagement – "teamwork".**

"Healthcare – the largest industry on Earth"

Europe except Russia:

- ✔ **Turnover: TUSD 1.4**
- ✔ **14 000 hospitals**
- ✔ **3.4 million hospital beds**
- ✔ **1.7 million doctors**
- ✔ **3.9 million nurses**
- ✔ **~ 9% of GDP**



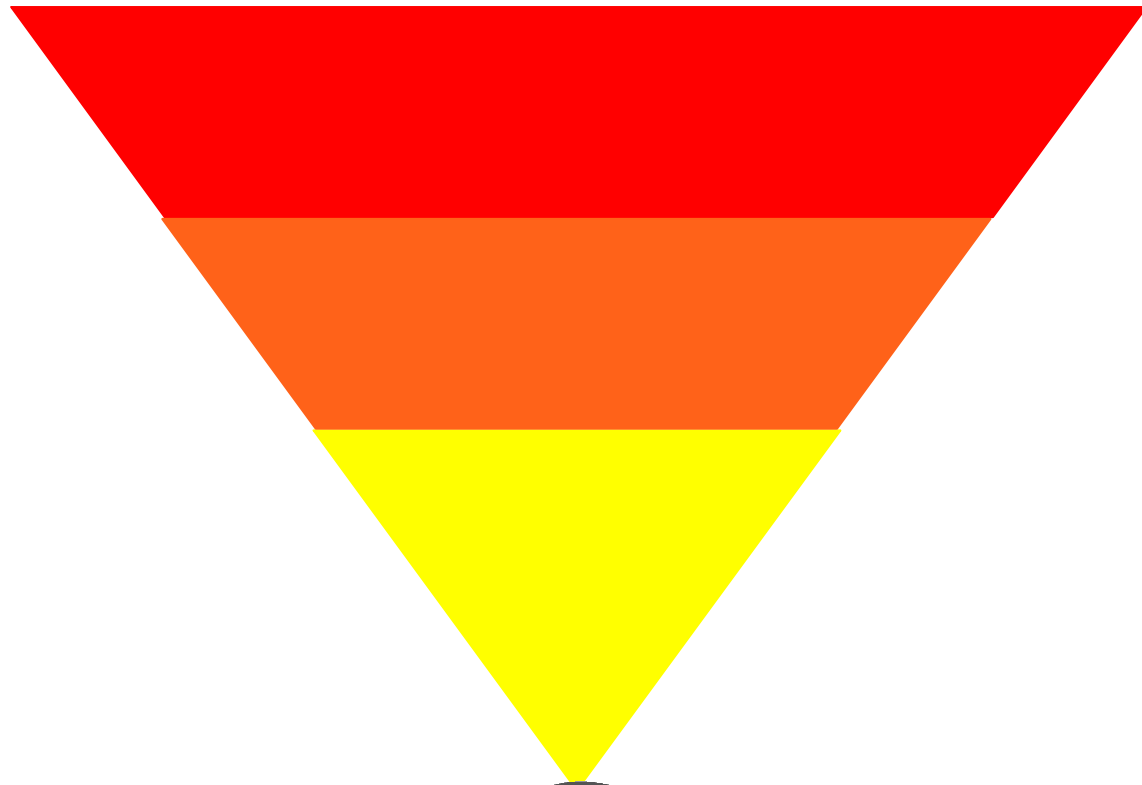
**Policy, organisation
essential to
change -
science is
doing
fine!**

**Customers,
consumers
in a new
mindset**



**Easily
accessible
information
will be a key
driver!**

"Value for money"



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Thank you!

www.healthpowerhouse.com

“Measuring healthcare in 35 countries, we improve it”