



Why investing in digital Health will democratize Healthcare

How to reform a global market that is still not considered to be a market by all stakeholders involved.

Tobias D. Gantner, MD, PhD, MBA, LL. M. | HealthCare Futurists GmbH | ECHAlliance | June 8th, 2016 | e-health-week, Amsterdam

We. Safe. Patients.



Comprehend. Change.



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**Change is great as long as for me
everything remains the same.**

Innovation is an Art that does not belong into a Museum.



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As Futurists we realize
that there's a big difference
between deciding to leave
and knowing where to go.
The first is based on forecasting
the latter on futurism.

innovate.healthcare



It's not gonna hurt.

A photograph of two surgeons in an operating room. They are wearing blue scrubs, blue surgical masks, and blue bouffant caps. The surgeon on the right is also wearing a green bouffant cap. They are both looking towards the camera. The surgeon on the right is holding a yellow circular control knob on a large, multi-lens surgical light fixture. The background shows the ceiling and other parts of the operating room.

Cot to 10 and hang in there



Healthcare is about the patient.

If we want your opinion,
we will give ours to you.





Patient centrlicity? What is that?



Patient Centricity?



Patient needs to adapt to the doctor.



Healthcare is a governmental issue



Data
Access
Denied

Data
Access
Denied

Data
Access
Denied

Data
Access
Denied

Entry into reimbursement is quite difficult.



There is a lot insecurity for investors thus.



Major players were seen in the field but they did not substantially change the system.



In fact, they became a part of it and thus contributed their fair share...

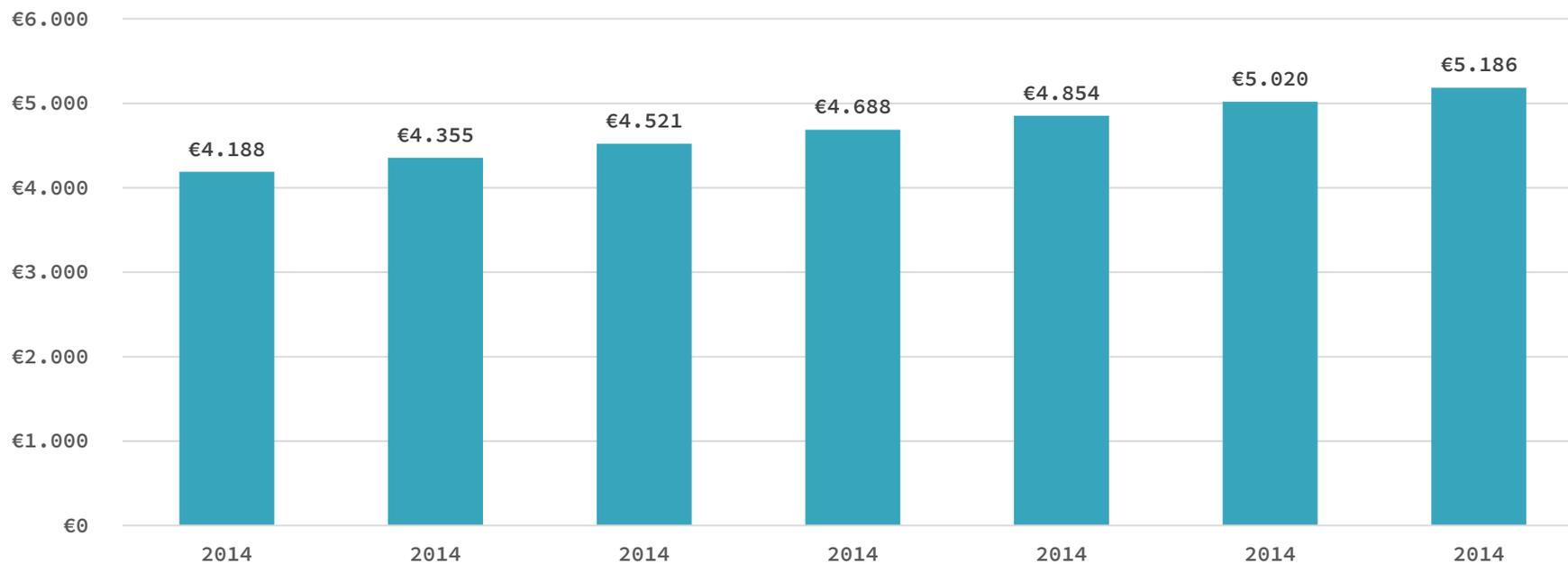


... to innovation stagnation in Healthcare.

Healthcare, even the public sector is perceived to be a growing market



Health Spendings per Capita in Germany





Possibilities opening up through technology seem to be without limits in healthcare

A young boy is dressed as a pilot, wearing a dark blue suit, a white shirt, a red tie, a brown aviator cap, and goggles. He has his arms raised in a triumphant gesture. He is standing on a dark wooden floor. Behind him is a light-colored, textured wall. A teal banner is overlaid across the middle of the image, containing the text "Healthcare is a potentially unsatisfiable market".

Healthcare is a potentially unsatisfiable market

 create.healthcare

2

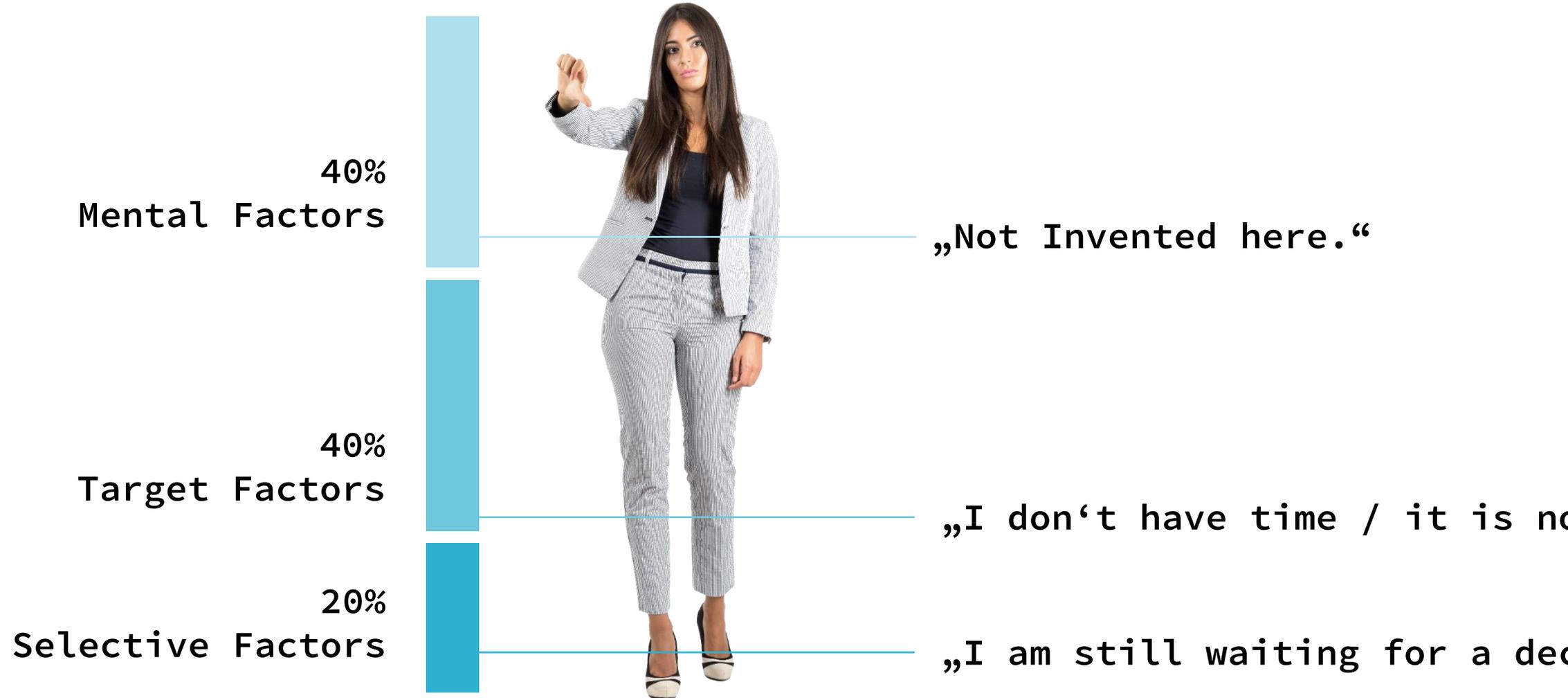


Engaging in making your own life better and create for others.



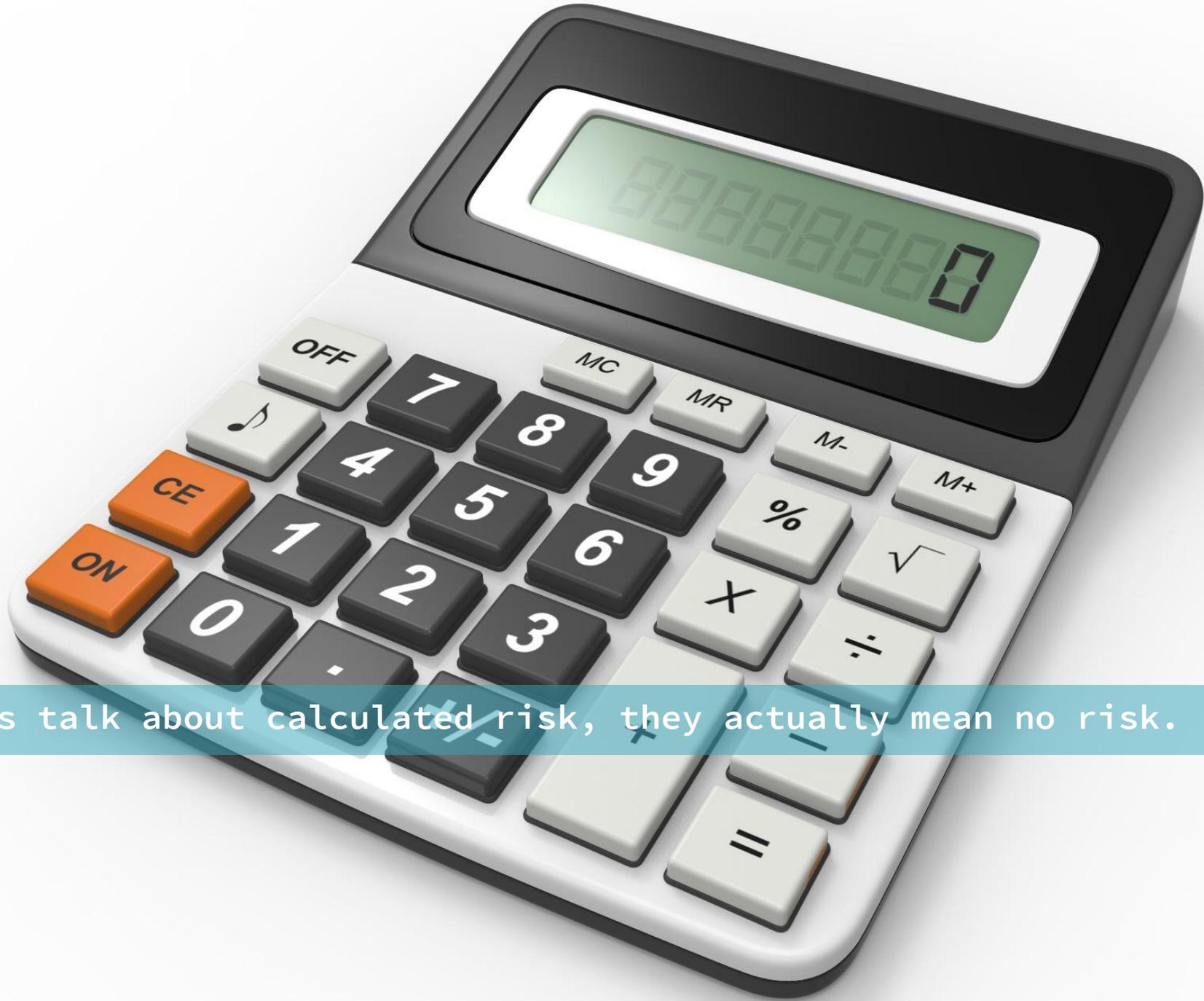
It's about saving lives.

There is an innate reluctance in big corporates in support change.



A man with dark hair and a surprised expression is sitting on a dark blue couch. He is wearing a light-colored t-shirt and blue jeans. The couch has several pillows, including a brown one on the left and a light-colored one on the right. The background is a plain, light-colored wall. A teal banner is overlaid at the bottom of the image.

Today's marketplace foster adopters rather than disruptors.



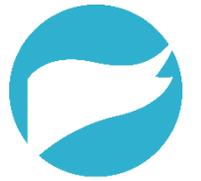
When companies talk about calculated risk, they actually mean no risk.

Still waiting for the first mover...?

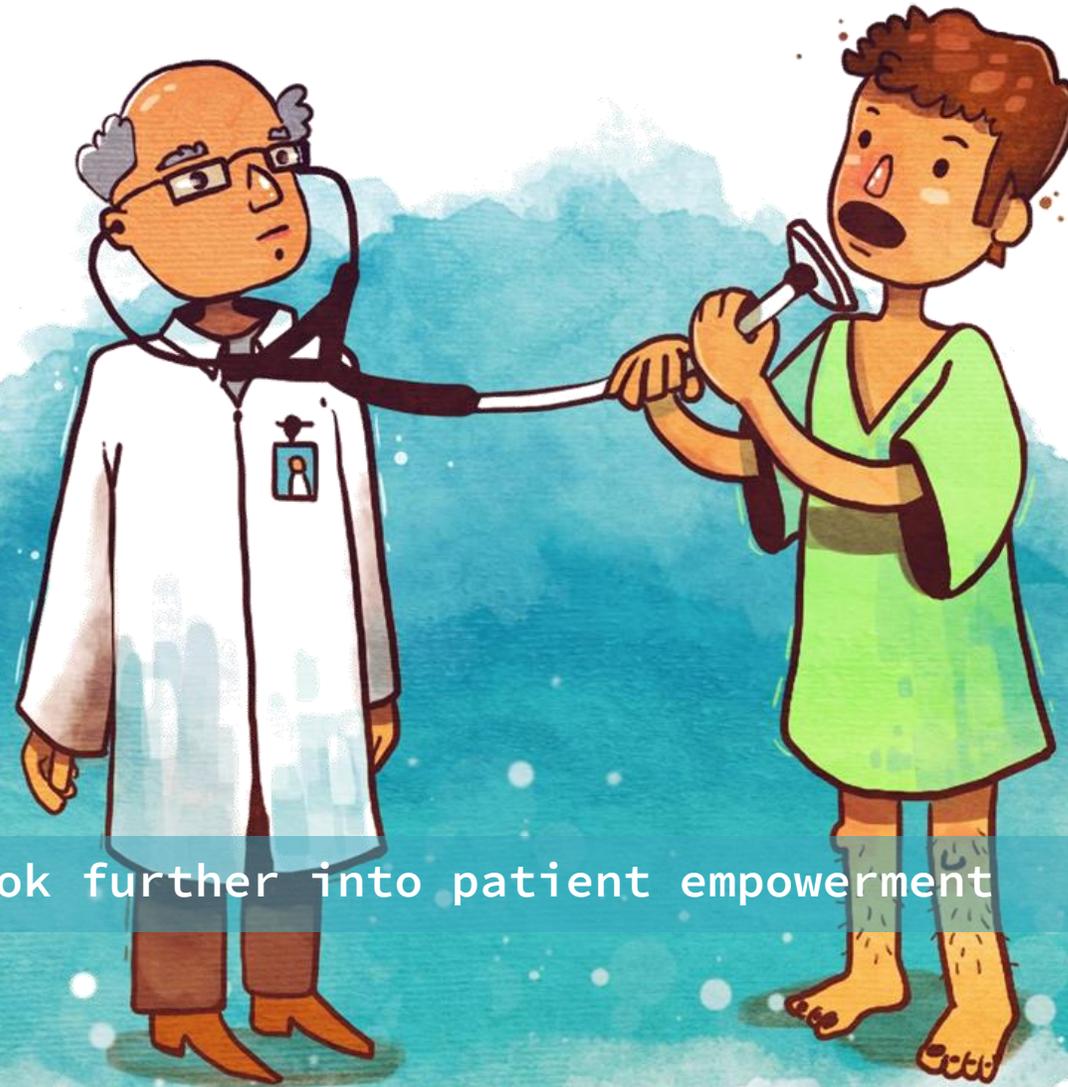


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It takes courageous investors and first movers to bring about change



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The next thing is to look further into patient empowerment





Will Dr. Google make the patient more health literate?

Are you ready to go Digital?



Today we are going to Change
Yesterday's plan for Tomorrow.

We. Change. HealthCare.

Digitalization will finally also reach healthcare

Healthcare Startups are translators



Medizinstudenten übersetzen Befunde in eine für Patienten leicht verständliche Sprache. Kostenlos.

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Auszeichnung als Querdenker



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5 Jahre „Was hab' ich?“

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25.000 verständliche Befunde

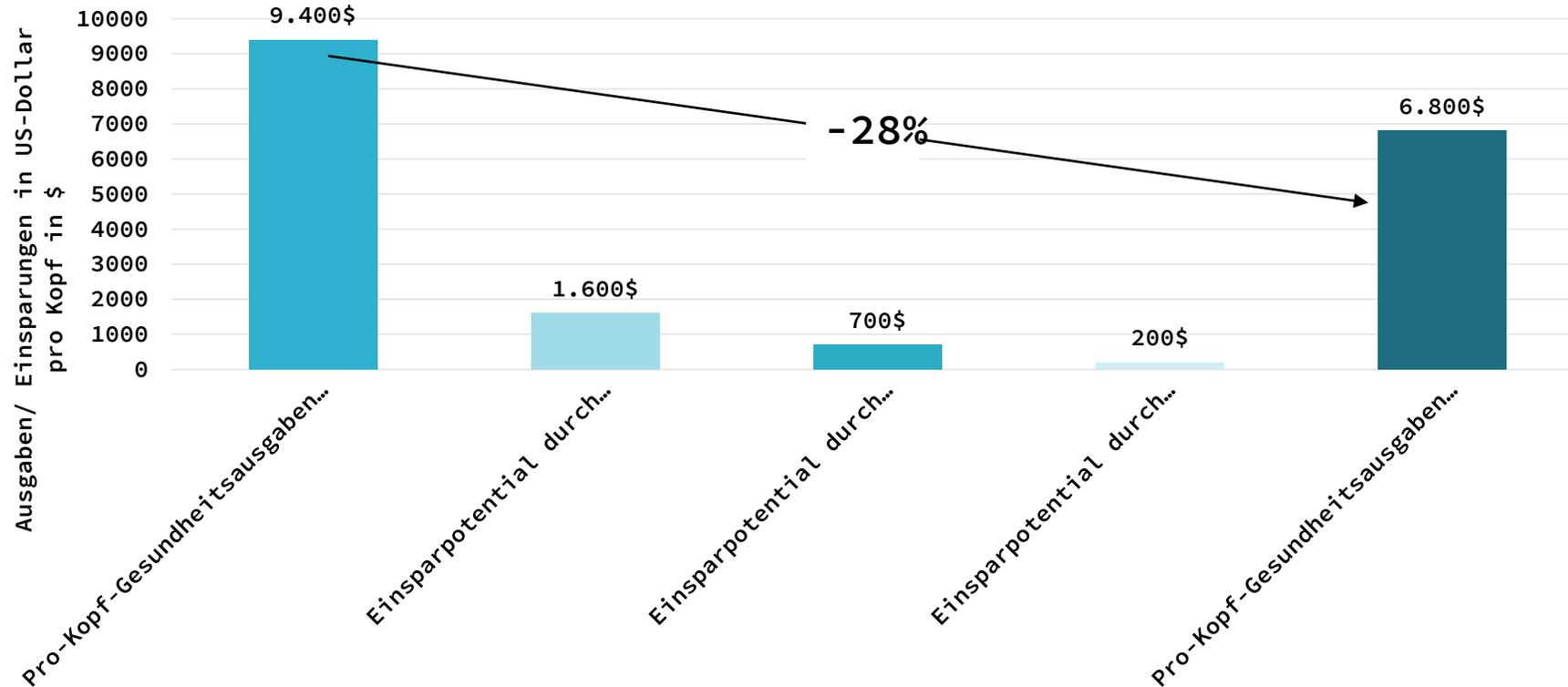
25.000



A hand is shown reaching up towards a single key that is in sharp focus and hanging from a string. Numerous other keys of various shapes and sizes are hanging from strings in the background, but they are out of focus. The background is a dark blue gradient.

The common denominator and key to the challenges is Quality in health care provision

The annual savings potential in health expenditures through digital health programs in the US in 2020 is at around 28%

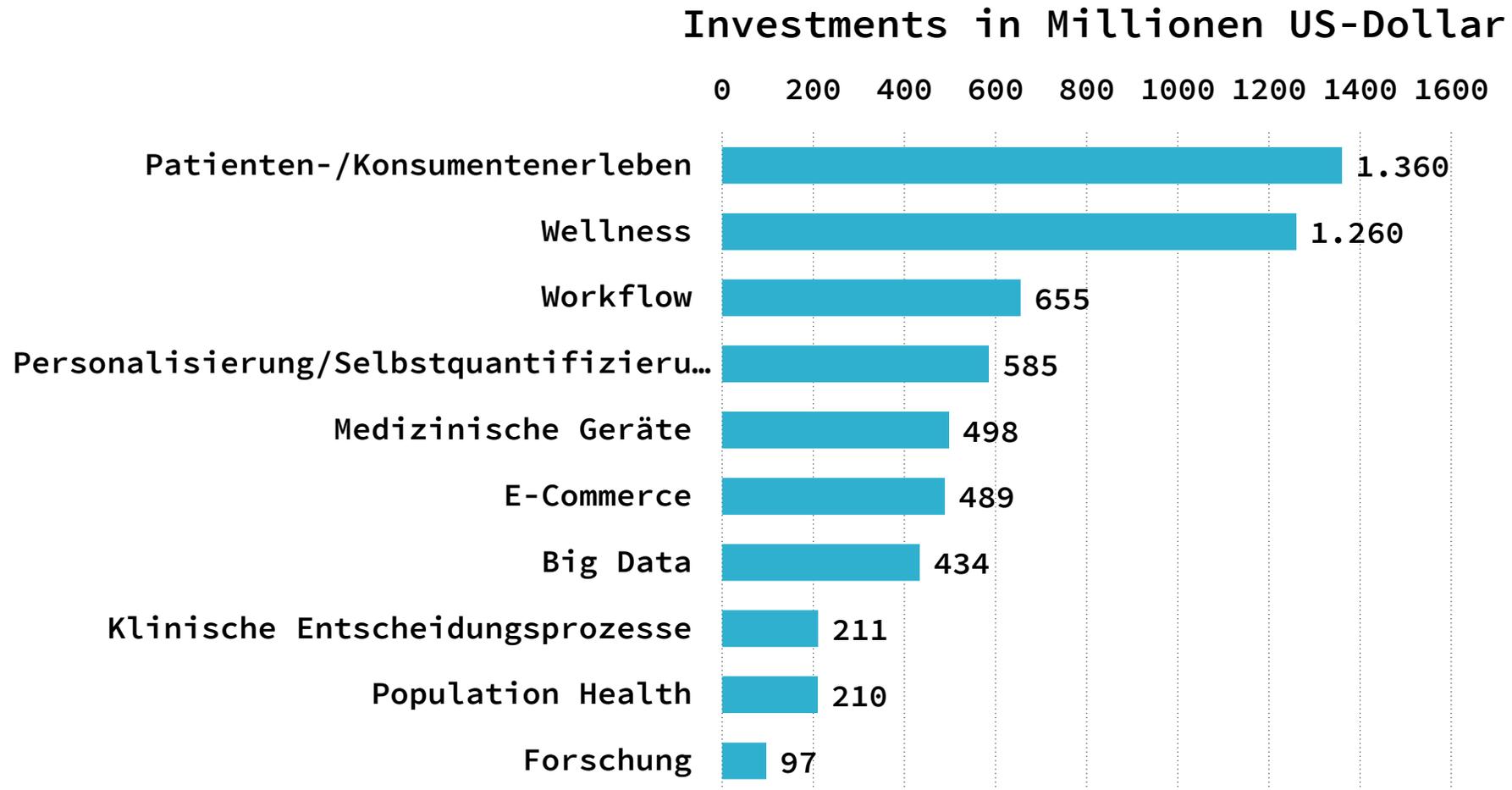


Source: CMS; US Census Bureau; Bain & Company



In order to change healthcare, patients, physicians, payers and politics need to agree.

Patient empowerment is already in the center of investment deals



Quelle: StartUp Health



So there will be more choices but also more transparency and a new understanding of
rols in healthcare.



Never give up attempting the Impossible



This sight might be familiar if you go the innovation route.



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HEALTHCARE

21. - 23.10.2016 in Hamburg, Germany

Building Bridges
Moving Healthcare

Building Bridges. Moving Healthcare.

Our next innovate.healthcare venue will take place in Hamburg from October 21st - 23rd. If you want to see innovation in action, join us!



Thank you! Questions?

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Today we are going to
change
yesterday's plans for



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Abstract: Investments in health-care are somewhat cumbersome. It takes special domain knowledge and passionate determination in combination with a lot of time at your hands.

But it is worthwhile in an area that is under heavy pressure for change. We see a number of established players reluctantly moving into new business models and we see a growing number of companies completely foreign to health-care trying to move in.

This turns things upside down and rules that we thought would be applicable to fast moving consumer goods do not resonate in health-care. This presentation engages with the changes we are currently undergoing and points to solutions for inventors, innovators and investors alike.

Healthcare is about the patient. But doctors are reluctant to implement patient centricity. A hospital does not work like a pit-crew in a formula 1 race, even though it should. In fact in healthcare inverse Taylorism is happening: the product needs to adapt to the producer and not the other way round. Furthermore healthcare is a governmental imperative therefore it is highly regulated and in most developed countries it is governmentally funded in one way or the other. This means a lot of rules apply before there is any chance to enter the market let alone get proper reimbursement that pays off in comparison to other markets such as fmcg. This is the reason why investment in healthcare is somewhat difficult to get: Not sure how long regulatory will take, not sure how high a governmentally regulated price will be, not sure when all of this will happen. All these facts kept grass root innovation in healthcare pretty much at bay for the last decades. Major players were seen in the field but they did not substantially change the system. In fact, they became a part of it and thus contributed their fair share to innovation stagnation in Healthcare. That is in a number of aspects a regrettable petty. 1. Healthcare is perceived to be a growing market. This is due to demographics but also due to technical possibilities unheard of. Furthermore health is a good that is not satiable (you can always sleep better, look better etc.). 2. Healthcare is about saving lives. Indeed statistical ones in the first place but then again, behind every statistics there are, as you know, real people. So it is giving back to society. 3. engaging into one's own health is an equal empowerment such as the right to vote or to freely chose one's fate.

Innovation that will be a game-changer needs supporters. Big companies are not always on the top of things if it comes to innovation. This is understandable, because today's marketplaces foster adopters rather than disruptors. When companies talk about "calculated risk", what they mean is "no risk". This is the reason why even though healthcare per se for all body owners (which obviously we all are) comprises such an interesting field to look into, it is on the other hand not yet another market but works according to its own rules as you are familiar with. This is the reason why now brave investors need to work through all available material to do their due diligence and hopefully stop turning blind eyes on this kind of risk venture capital. The next big thing in health-care is thus to empower the patient. This not only means to get the patient to co-decide maybe with the help of virtual consultations upon their further therapy. So it is about breaking an interpretation monopoly and including the one that is actually affected the most from this specific disease. The patient. Investment in digital health will lead to new diagnostic and education tools. Thus more knowledge will come in and patients will become health literate and engaged with their own physician. Engagement means questioning,