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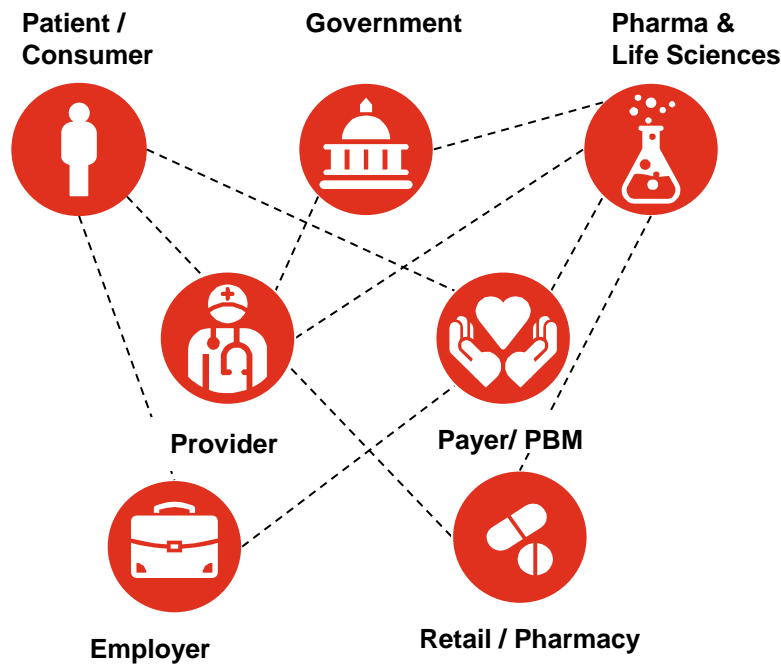
Delivering value in the New Health Economy

New York Health Plan Association

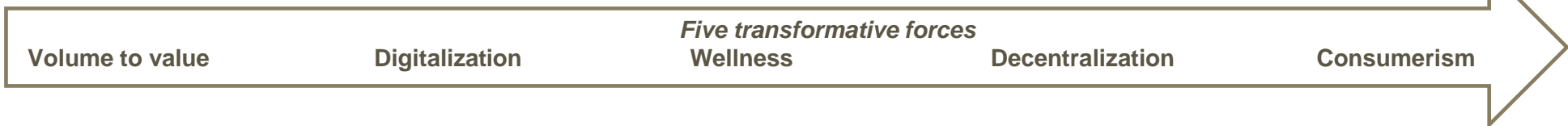
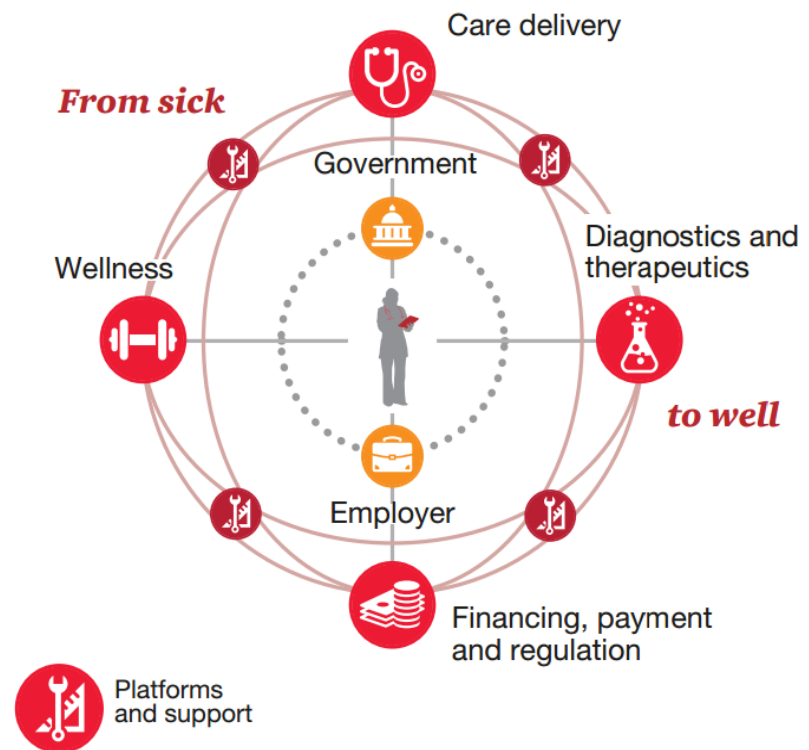
November 16, 2017

Healthcare is undergoing a transformation from a closed and highly-siloed industry into a plug-and-play ecosystem of modules serving the consumer

The traditional health industry

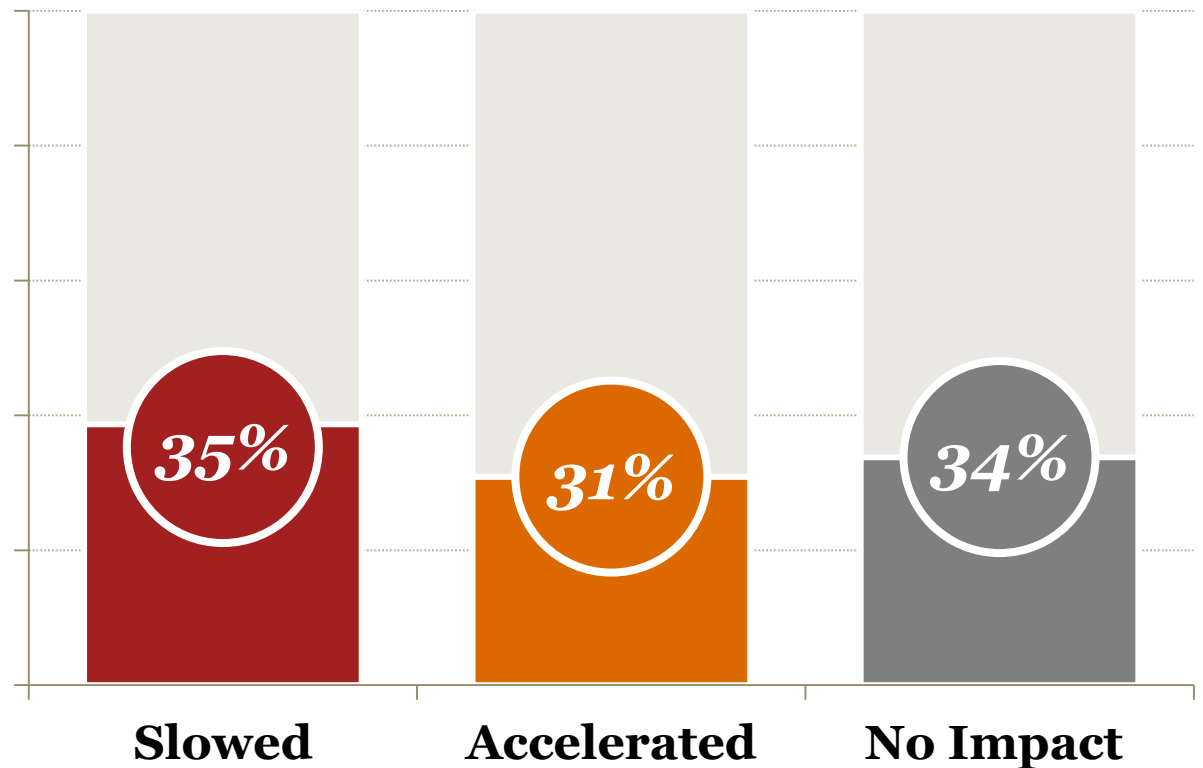


The New Health Economy integrated ecosystem



Some healthcare providers say current regulatory uncertainty is prompting them to adjust their value-based strategies

How has current regulatory uncertainty impacted your organization's implementation of value-based care strategies?

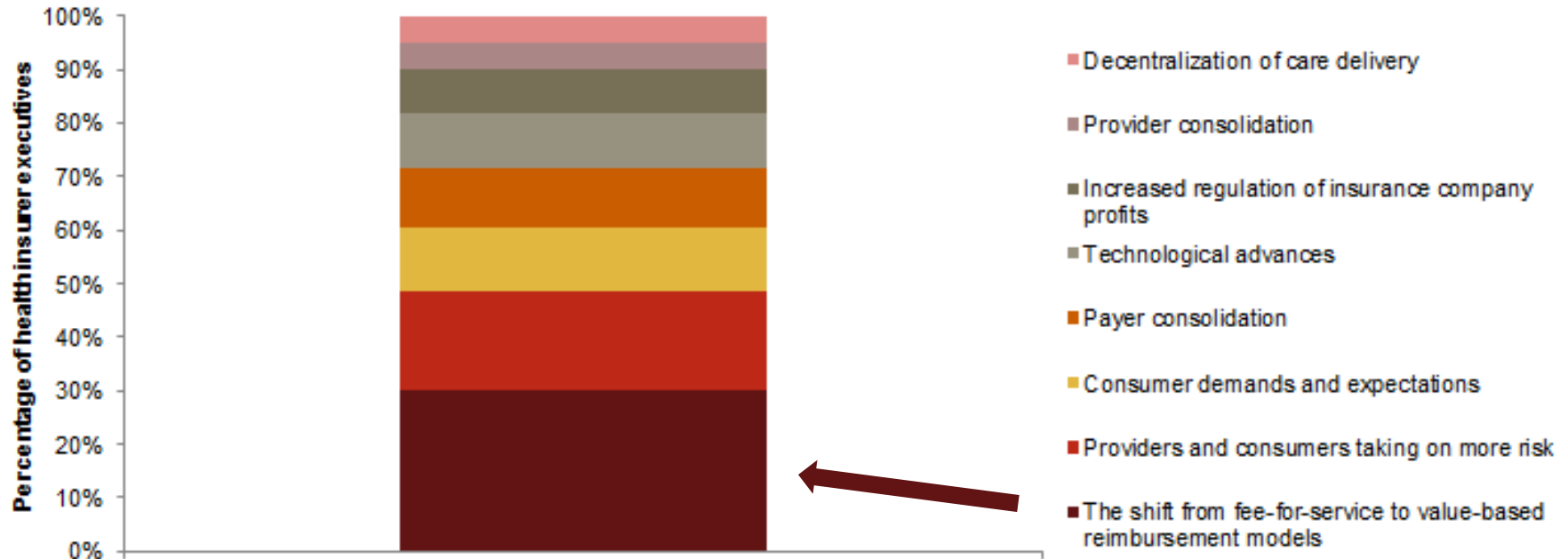


And pharmaceutical executives aren't convinced the benefits of value-based contracts for prescription drugs exceed their risks



However, health insurers still believe the shift to value-based care is going to have the greatest impact on how they do business in the years ahead

Percentage of health insurer executives who believe each of the following forces is going to have the greatest impact on the way they do business in the next five years



“Employers aren’t convinced that all the best solutions are coming from insurers and increasingly are looking outside for innovators that are challenging the status quo.”

– Mike Thompson, CEO of the National Alliance of Healthcare Purchaser Coalitions

And that regardless of the new administration and future efforts to reform healthcare, the shift to value-based care and rise of consumerism show no signs of abating

Percentage of health insurance executives who said...



The shift to value-based reimbursement will either accelerate or not be impacted by the new administration.

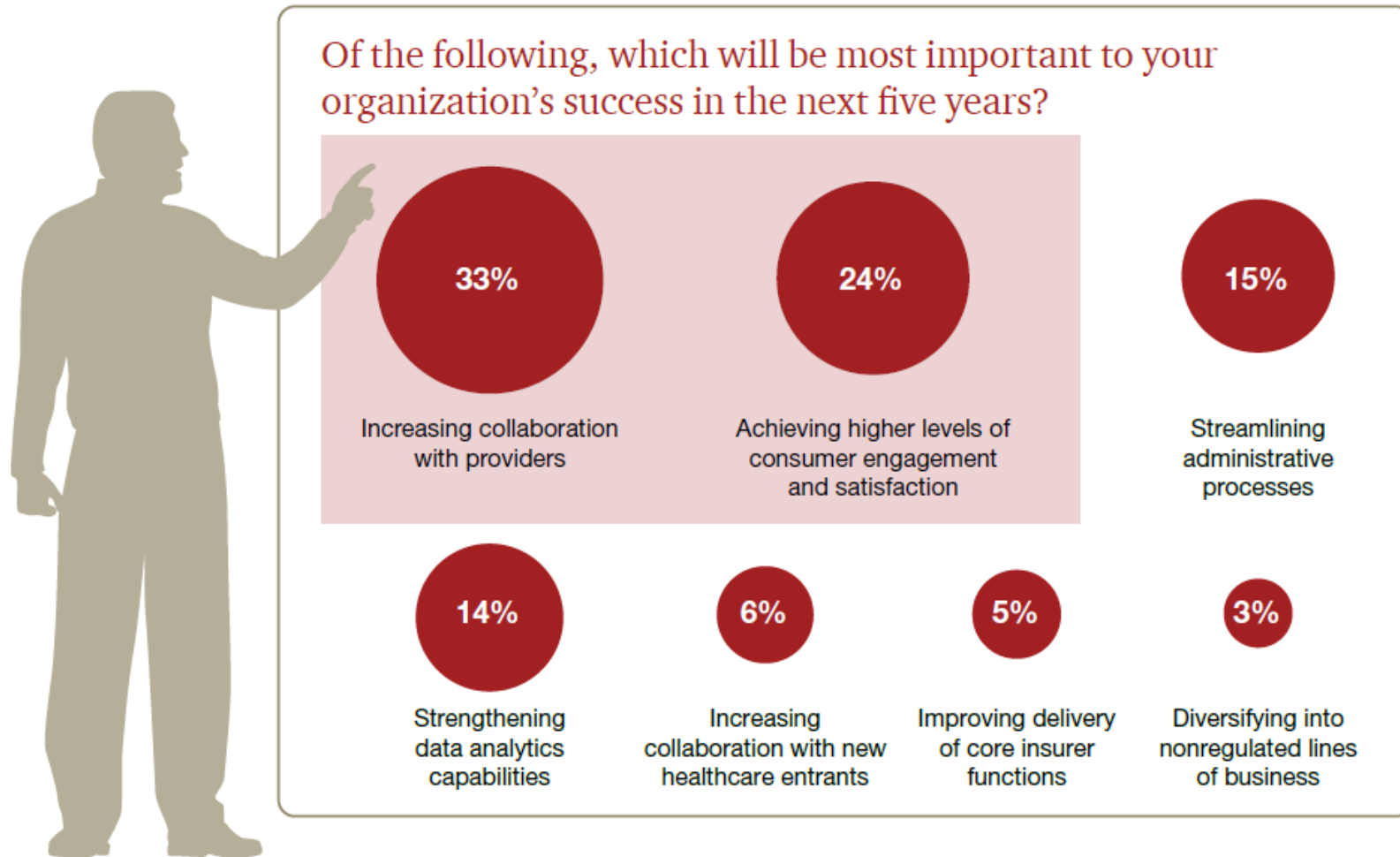


The consumerization of healthcare will accelerate in the coming years.



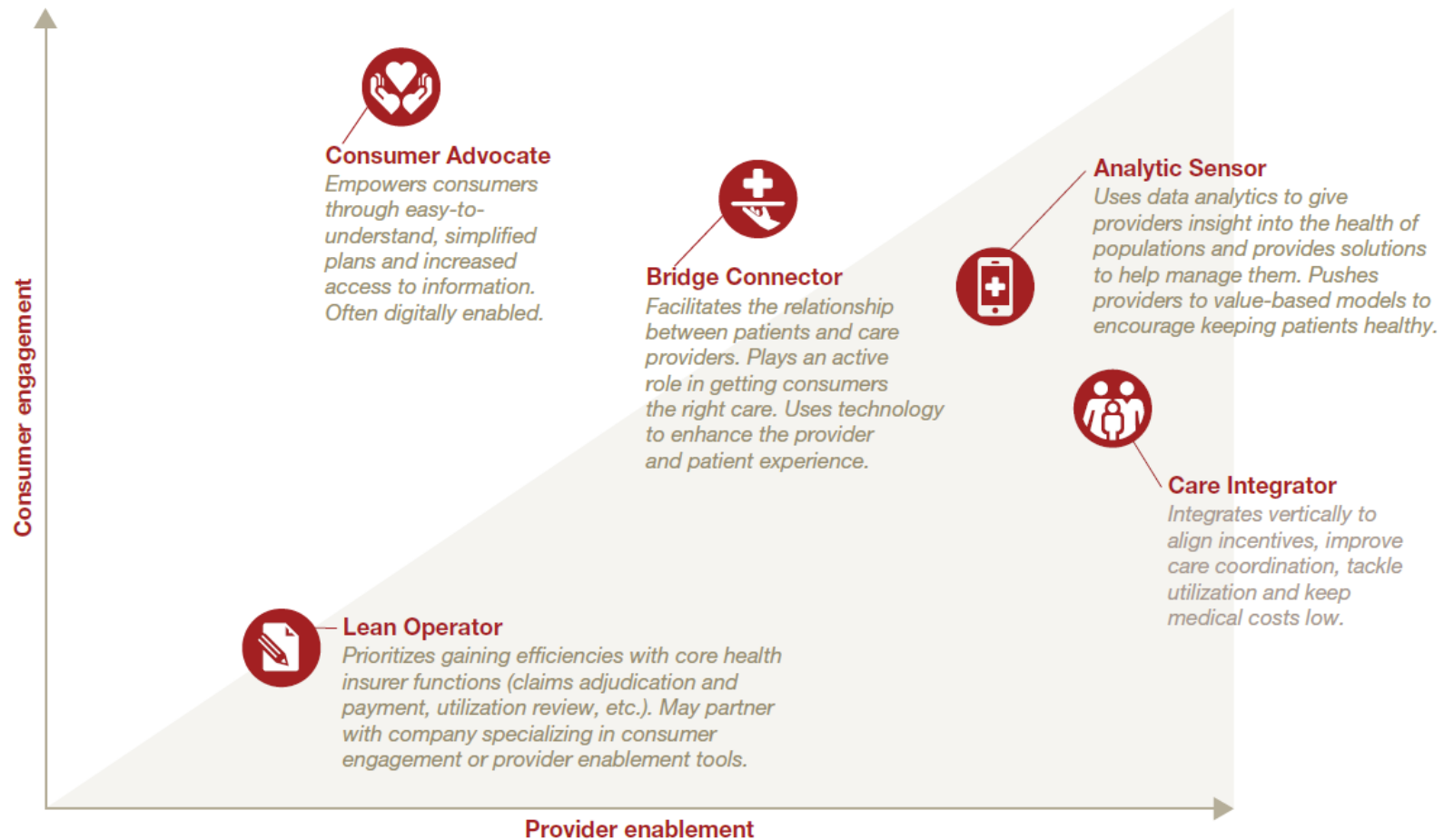
Providers and consumers taking on more risk will continue to accelerate.

To deliver more value, health insurers know they will need to increase collaboration with providers and better engage consumers



Health insurers who thrive in the future will support providers through data analytics platforms, improve care coordination and invest in non-clinicians

HRI's five models of the health insurer of the future



What it means for business

Partner where it makes sense

Payers will need to partner with providers, new entrants like retail clinics and telehealth companies, and community health organizations such as schools, churches and community centers, to expand their footprint, develop new service offerings, diversify their workforces and improve care delivery.

1

Explore new roles

Consumers and clinicians alike are supportive of the use of non-physician practitioners. Organizations that use all caregivers at the top of their training and in the most appropriate care settings will likely surpass others with regard to access, affordability, quality and consumer satisfaction.

2

Use data and analytics to design, deploy and deliver

Deploy technology to stratify consumers and discover where cost-savings opportunities lie. Determine the mix of services and staffing approaches to meet each consumer's unique needs and preferences.

3

Help providers focus on delivering care

By supporting and automating processes like patient eligibility and prior authorization when possible, health insurers can relieve some of providers' administrative burdens, freeing them up to focus on delivering care.

4

Questions?

Thank you!

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