



China Future of Health 1.0

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MAKING AN
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Agenda



Future of health : a global view



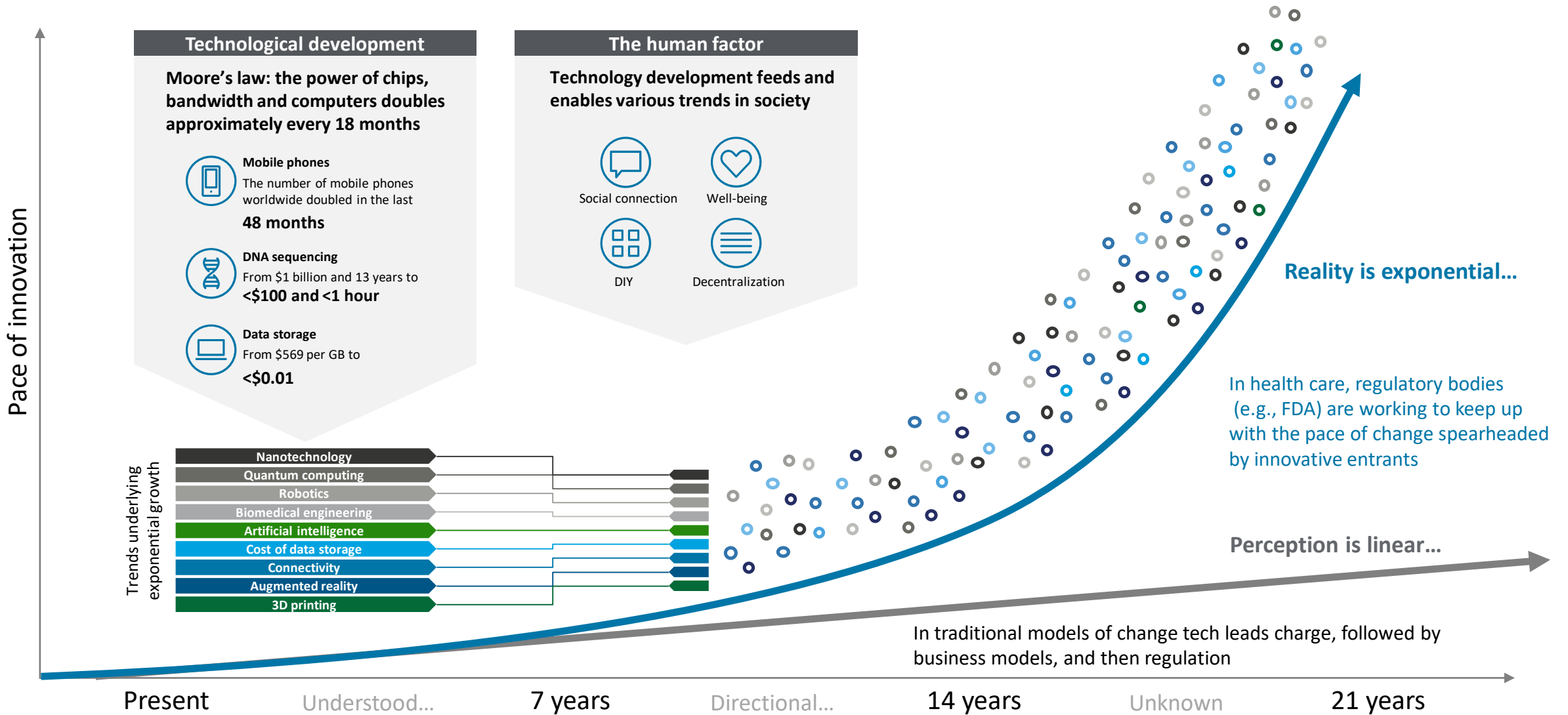
Future of health : a view with Chinese characteristics

Future of health : a global view



Change accelerates disruption

Exponential change will accelerate the pace of disruption



Trends driving a new Future of Health by 2040

 Changes are taking place in the health care industry, driving towards large-scale industry disruption

The **empowered consumer** is becoming increasingly focused on their **well-being** and demanding more **customized products and insurance offerings**



Affordable health for all



Native data-oriented entrants disrupting incumbents



From care to health to well-being



Acceleration of digital health evolution



Interconnected health communities



Regulation encouraging long-term accountability



Evolution of trusted patient/caregiver relationship



Health data ownership by consumers



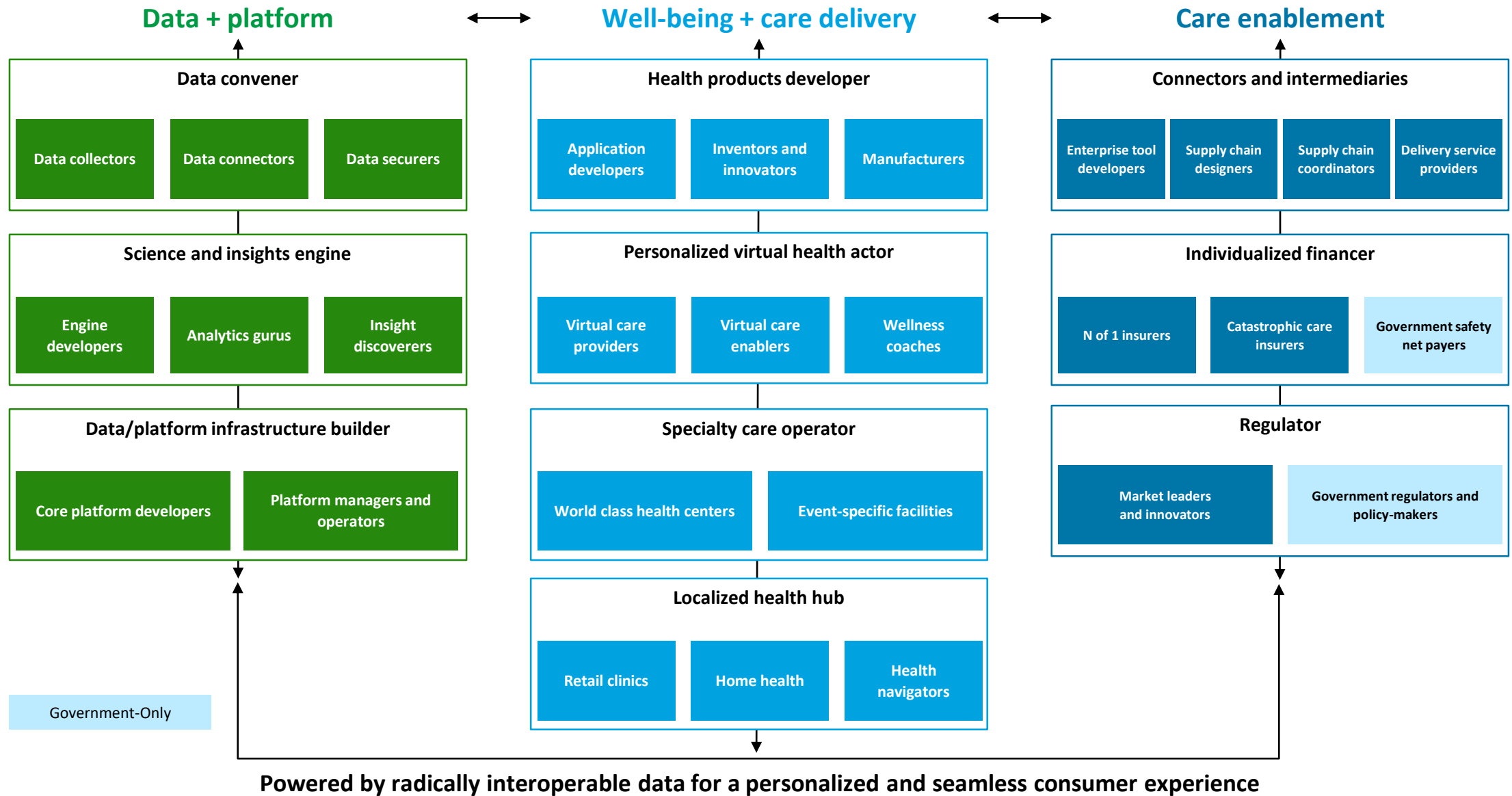
“N of 1” personalized care



Personal cognitive and AI for improved outcomes

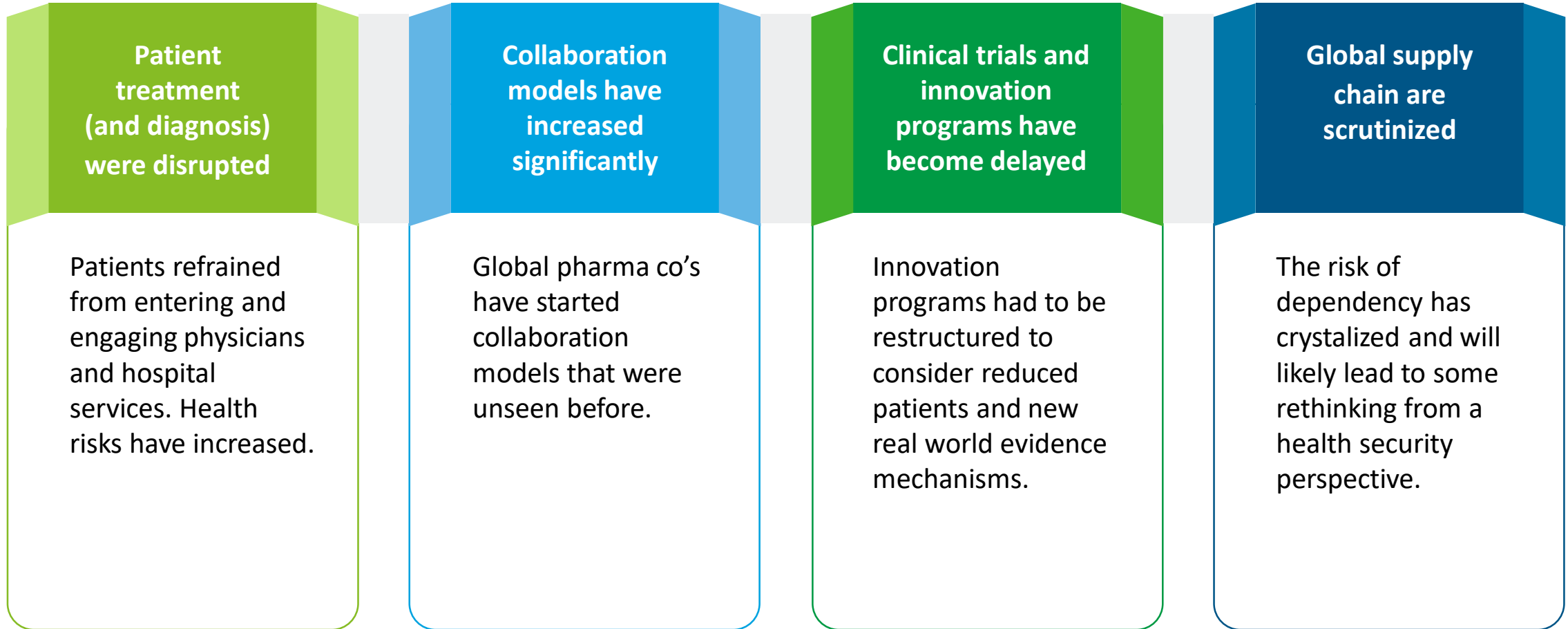
**The future of health will be driven
by digital transformation enabled
by radically interoperable data
and open, secure platforms**

Global View Outlook : There are 10 winning business archetypes in the Future of Health



The impact of Covid-19 on the global healthcare system

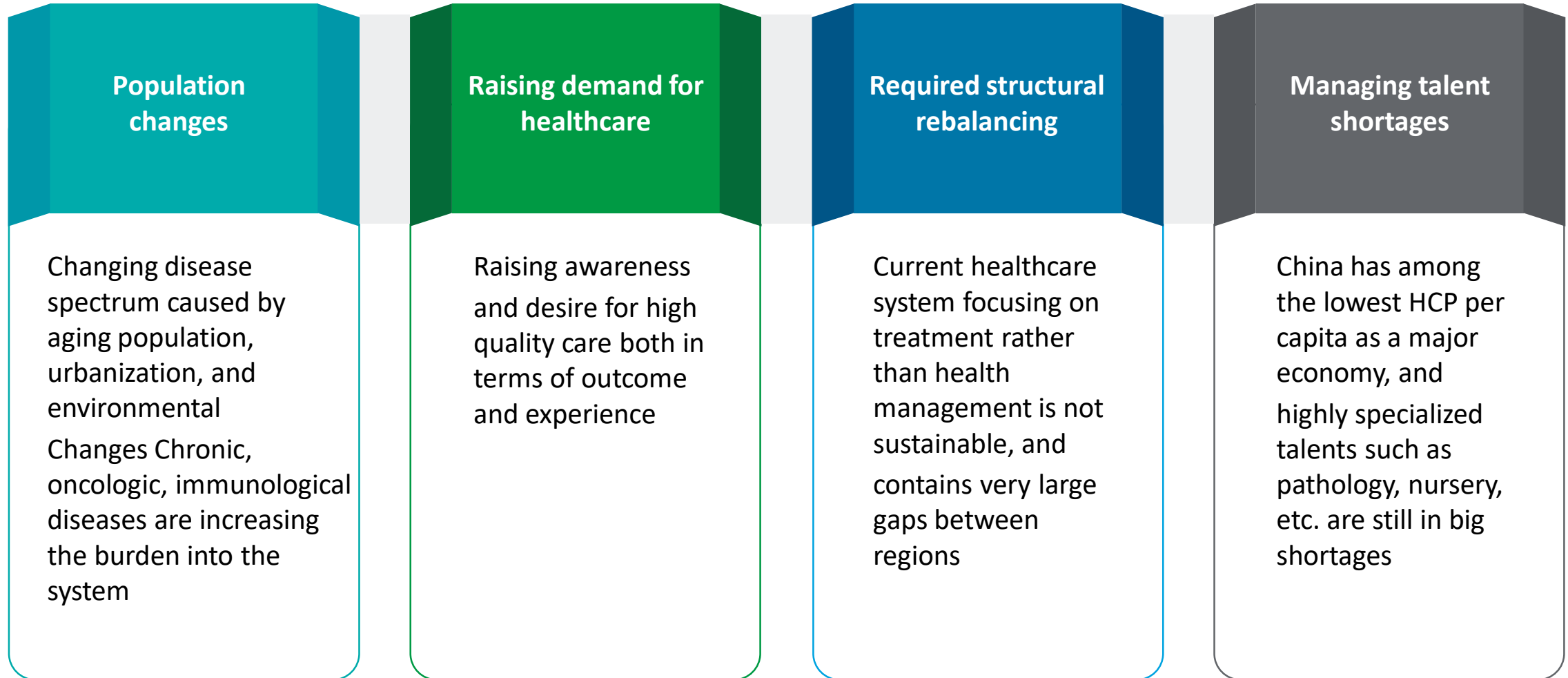
High lightning just a few of the impacts, which we have seen consistently across the globe



Future of health : a China view 1.0



China's current healthcare has large gaps to bridge



COVID-19 outbreak brings new challenges and opportunities to the industry

Challenges



Tremendous pressure on the reimbursement fund



Increasing policy supports for innovation



Roaring awareness of disease prevention



Rapid development of online channel

Descriptions

- Chinese government has provided free medical care for COVID patients, exerting further large amounts of **pressure on the reimbursement fund**
- The COVID-19 further accelerated government's efforts to **promote innovations in healthcare and life science**
- The pandemic has significantly increased the public's attention and awareness of **disease prevention and early treatment**
- Under COVID-19, government's encourage and consumer's behavior change has given **online channel unprecedented significance** in the healthcare ecosystem

Key trends are re-defining the future of health in China

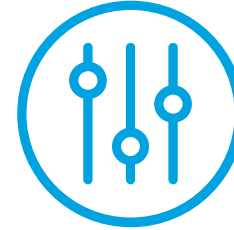
The 8 trends that Deloitte believe will re-define the future of health in China



Aging population and chronic diseases accelerate upgrade in senior care



The rise of public and private health big data enterprises



Exploding genomics and next-generation therapies



Smart health deliveries with tele / virtual medicines



E-commerce directly connecting products with patients / consumers



Expanded adoption of AI and automation

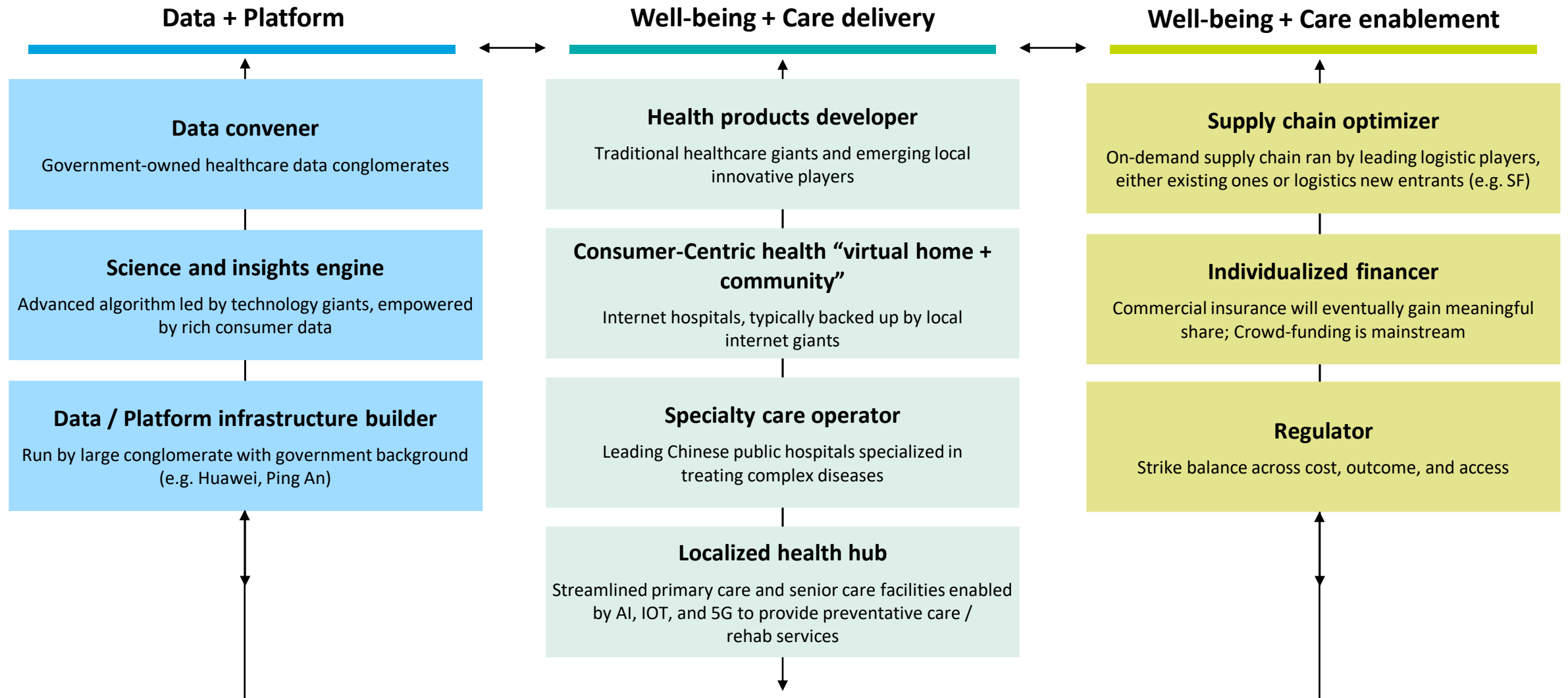


Platform-based business model innovation



An emerging new health ecosystem defined with cross-sector convergence

In the future China healthcare system will look very different



Powered by radically interoperable data for a personalized and seamless patient experience

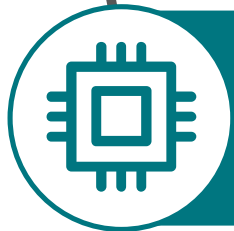
Perspectives and conclusions

China's future of health care will certainly continue to provide a large range of opportunities to industry actors allowing value creation and important patient care

A few final thoughts



The next 14th five-year plan, in finalization by the end of 2020, will more than likely emphasize China's health care ambitions and highlight areas of particular attention by the central government.



As new technologies roll out, facilitated through large nationwide investment programs, will impact health care, how services are being delivered, how products are brought to market, and ultimately benefit patients in China.



China's pharma and health care market will continue to provide opportunities for global players in a market that will not only see more local and domestic innovation and competition, but also see new entrants who will want to get a value share of the "future of health" in China.

Deloitte China

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