



▶ Nike, Walmart, Intel & Pharma: Welcome to Healthcare 3.0



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Grail of government and private payers these days is patient outcomes, then how do we know if these tools are actually motivating healthier behaviors and how do we prove it? Are these tools improving community health? Are they being used by the people who need them most? Where are the data?


RIDING THE WAVE

The next wave of innovation must include clear measurements of effectiveness and actual mechanisms for judging the impact on patient outcomes. To achieve this, pharmaceutical and biotech companies may look to partner with companies that have particular skills in usability, activation, and retention.

Imagine this: a pharmaceutical company with expertise in diabetes or cardiovascular disease partners with Nike+, Adidas mi-Coach, or Nintendo's WiiFit to create a data-driven, medically rigorous tool that expands upon the successful technologies these companies already have in the marketplace to build something that makes a difference in disease management. The Nike, Adidas, and Nintendo tools already are part of the everyday fitness regime for millions of people worldwide and contribute not just to physical well being, but to personal and social engagement as well. These tools are more than a marketing gimmick; they use cutting-edge data visualization/goals/feedback and links to build community involvement and peer support. They're a hit.

Now, overlay the pharmaceutical industry's deep knowledge of diabetes and cardiovascular disease, bring in a medical device maker to build in monitoring of heart rate or blood glucose levels, and invite a telecom partner to help transmit these data to a primary care physician and aggregate nonidentifiable data to measure impact on the health of a community or population.

EMBRACING NEW PARTNERS

Technology will only improve patient outcomes if it is done right and the pharmaceutical sector will only flourish, as E&Y notes, with new forms of partnerships and the skillful use of technology. The days of "follow the doctor's orders" are coming to an end. The receipt of a prescription is only the beginning. As payers cut reimbursement, narrow the range of drugs covered, and closely examine patient outcomes, it's time for the pharmaceutical sector to say, "there's an app for that." 

This year's report on the pharmaceutical sector by Ernst & Young reminded me of that classic tale of technological transition — the fate of the wagon wheel maker. With the introduction of the automobile, one wheel maker was asked what business he was in. "I make wagon wheels," he replied. But another wheel maker asked the same question replied, "Wheeled transportation." Guess which one went out of business and which went on to become Firestone Tire.

Today, pharmaceutical companies must broaden their focus from producing medicines to delivering healthy outcomes — a shift that will involve a much greater use of technology and more innovative collaborations with nontraditional partners worldwide. The E&Y report, *Progressions: Building Pharma 3.0*, says the new pharmaceutical ecosystem will comprise established industry members, nontraditional companies, and an increasingly informed, data-powered consumer.

Already, companies such as IBM, General Electric, and Telus Corp. (Canada's third largest wireless carrier) have committed to spending at least \$20 billion on health-related information services. And while the pharma/biotech sector increased spending on mobile applications and educational websites by 78% last year, the industry still is spending only a fraction of what other sectors are investing.

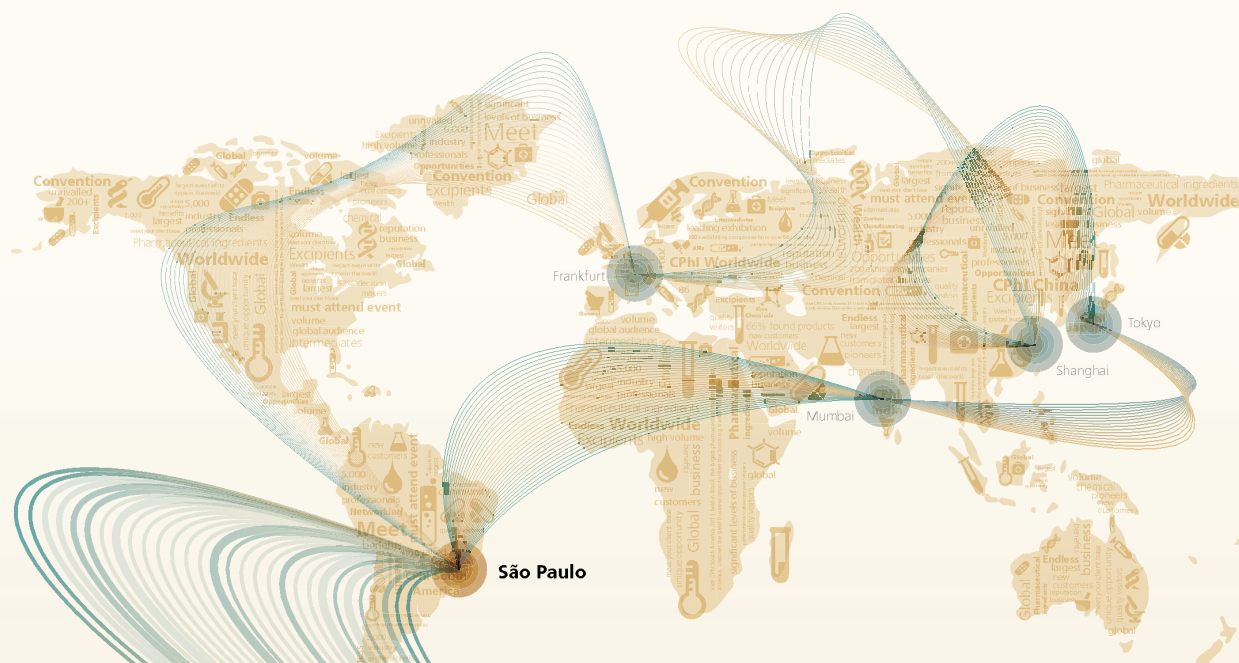
Walmart saw a market opportunity in an enormous population of uninsured and underinsured Americans and now delivers a whole new model: affordable primary care. If Walmart can find a profitable model for entering healthcare, then pharmaceutical firms must find innovative models for expanding their role.

We must look for the opportunities in the greatest challenges facing the industry — health reform, comparative effectiveness, and the rise of the empowered patient at the center of the healthcare system. And we must search the business landscape for partners that can help up our game.

It isn't that the pharmaceutical and biotech sectors are sitting on their hands. The industry and every player in it is looking at how it can have the most impact on the patient journey. Despite concerns over regulatory scrutiny, particularly the reporting of adverse events, almost all pharma companies are now exploring the use of technology tools at every stage of the product lifecycle, from clinical trial recruitment through sales training and tracking of patient adherence, and across a host of therapeutic areas.

That same E&Y report notes that 41% of pharma technology projects launched last year were smartphone apps, an increase of 11% since 2006. One such iPhone app provides physicians with detailed animation and diagrams of the human heart, X-ray animations, and electrocardiogram demos to show patients how atrial fibrillation affects the heart to encourage newly diagnosed patients to stay on treatment. Applications to help patients track vaccinations, monitor blood pressure, and remind them to take their medications are widespread.

There's tremendous innovation and experimentation with tools designed to help people stay healthy, but what is the actual impact? If the Holy



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