

The global market for Population Health Management, 2016

A series of 3 reports on the
emergence of, and opportunities in,
Population Health Management,
across the world.

Report 1 of 3:
Problems and Solutions So Far

Contents

Foreword	5
Disclaimer	5
01 Introduction and Definition of Population Health Management	7
1.1 Editorial Introduction	8
1.2 Defining Population Health Management	9
02 Crisis? What Crisis?	11
2.1 Drivers of health costs	12
2.2 The US story	15
2.3 Chronic disease - the global picture	18
2.3.1 Latin America	18
2.3.2 Europe	19
2.3.3 Russia	19
2.3.4 Gulf Cooperation Council	20
2.3.5 Africa	20
2.3.6 India	21
2.3.7 China	22
2.3.8 South East Asia	22
2.3.9 Australia	23
2.4 Economic impact overall and by region	24
2.5 Economic impact on employers	28
2.6 Conclusions to date	32
03 History of Population Health Management	37
A mostly 'invented in the US' story, which is at least 30 years old	38
04 Solution Tool Box - What Exists and Pros & Cons	49
4.1 Categorization of services	50
4.2 Data collection and analysis tools	51
4.2.1 Health Risk Assessment	51
4.2.2 Physical Screening	52
4.2.3 Healthcare Information Technology Systems, Data Management, Data Analytics Software	54
4.2.4 Wearables and Biosensors (E-Health)	59
4.3 Prevention/Education	64
4.3.1 Occupational Health Programs	64
4.3.2 Employee Assistance Programs	65
4.3.3 Wellness Programs, Behavioral Change and Risk Factor Management	67
4.3.4 Absence Management Programs	72
4.4 Managed Intervention	74
4.4.1 Pre-authorization/Pre-certification/Utilization Review	74

4.4.2	Case Management	75
4.4.3	Condition Management	76
4.4.4	Telehealth/'M'health for cost reduction/better care	78
4.4.5	Pharmacy Benefit Management/Drug Adherence	80
4.5	Delivery Mechanisms	83
4.6	Conclusions	89
05	Summary of the Debate - Key Lessons	91
5.1	Introduction	92
5.2	Conclusion: Does PHM work? YES, but only if done right	92
5.3	What does "doing it right" mean?	94
5.4	Lessons	96
06	Key Consumers - Who, Why and Where?	107
6.1	Introduction	108
6.2	Overview of buyers	108
6.2.1	Corporates (private and state-owned)	110
6.2.2	Governments	114
6.2.3	Health and Life Insurers/Re-insurers	116
6.2.4	Hospitals, Health Maintenance Organizations, Accountable Care Organizations and Medical Practitioners	118
6.2.5	Individuals	119
6.2.6	Consolidators and Advisors	119
6.2.7	Healthcare Intergovernmental Organizations, Non-Governmental Organizations and Foundations	119
6.3	Future trends	122
07	Catalysts - Who is Pushing Wellness?	123
7.1	Overview of Suppliers	124
7.2	Category 1): Health service companies	125
7.3	Category 2): Employee Benefit Consultants	126
7.3.1	AON Hewitt	126
7.3.2	Buck Consultants	128
7.3.3	Mercer	130
7.3.4	Towers Watson	132
7.3.5	Willis	134
7.4	Category 2): Assistance companies	136
7.4.1	International SOS	136
7.5	Category 3): Pharmaceutical companies	138
7.5.1	Pfizer	138
7.5.2	Sanofi	140
7.6	Category 3): Enablers	142
7.6.1	Sodexo	142
7.6.2	Walgreens	144
7.6.3	Apple - HealthKit	146

7.6.4	Google	147
7.6.5	Philips HealthTech	149
7.6.6	Siemens	151
7.7	Conclusions	153
08	Market Opportunity - Today and To Come	155
8.1	McGrigor Group PHM market definition/segmentation	156
8.2	Workplace wellness market size 2015, globally and by region	157
8.2.1	Global	157
8.2.2	Regions	160
8.3	PHM sub segments, size, globally and regionally	162
8.3.1	IT supplier- based approaches	162
8.3.2	Retail	163
8.3.3	Summary so far	164
8.4	Growth trends to date	164
8.5	Predicted growth	165
8.6	Assessing potential opportunities by segment and region	166
09	Executive Summary	173
9.1	The elevator pitch	174
9.2	Expanded summary	176
9.2.1	A definition of PHM	176
9.2.2	Crisis, what crisis?	176
9.2.3	Evolution of PHM programs	177
9.2.4	Solutions Tool Box – what exists and pros & cons	177
9.2.5	Key lessons from PHM so far	177
9.2.6	Key Consumers – who, why, where	178
9.2.7	Catalysts	178
9.2.8	Market Opportunity – today and tomorrow	178
10	Next Steps	181
10.1	Preview of Reports 2 & 3	182
10.2	Companies profiled in Report 2	183
11	Appendix	185
11.1	McGrigor Group: what can it do?	186
11.2	Acknowledgements	186
11.3	Key contacts in McGrigor Publishing	187
11.4	Abbreviations	187
11.5	List of tables and figures	191