



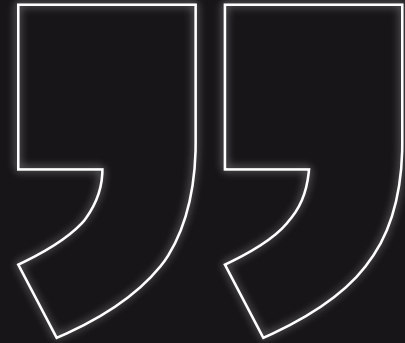
**GLOBAL WELLNESS
SUMMIT 2018**
OCTOBER 6-8 | TECHNOGYM | CESENA, ITALY

In Search of the Perfect Health System

Mark Britnell, global chairman & senior partner,
infrastructure, KPMG International, UK



The world is a book and
he who does not travel
reads only one page
St Augustine





77

Countries

330

Occasions

25 short chapters
on the world's
most interesting
and innovative
health systems

In Search of the Perfect Health System

Mark Britnell

Insights from:

Listening to and advising hundreds of government, public and private healthcare organisations.

Professional experience running a hospital, a region and a health system.

Personal experience as a cancer patient.

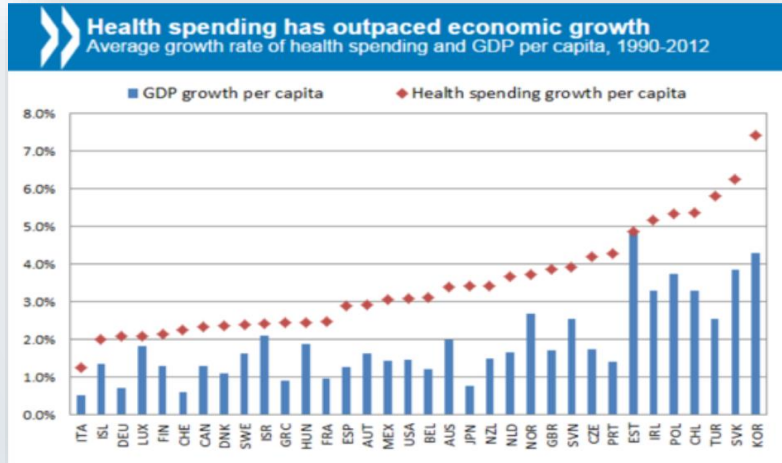


Healthcare costs are rising **faster than GDP** in most OECD countries

The WHO estimates there will be a **shortfall of 18 million health workers** globally by 2030

A rising incidence of **NCDs** is driving demand for health services globally

Many NCDs are **preventable** through behavior modification: Diet, exercise, alcohol and smoking



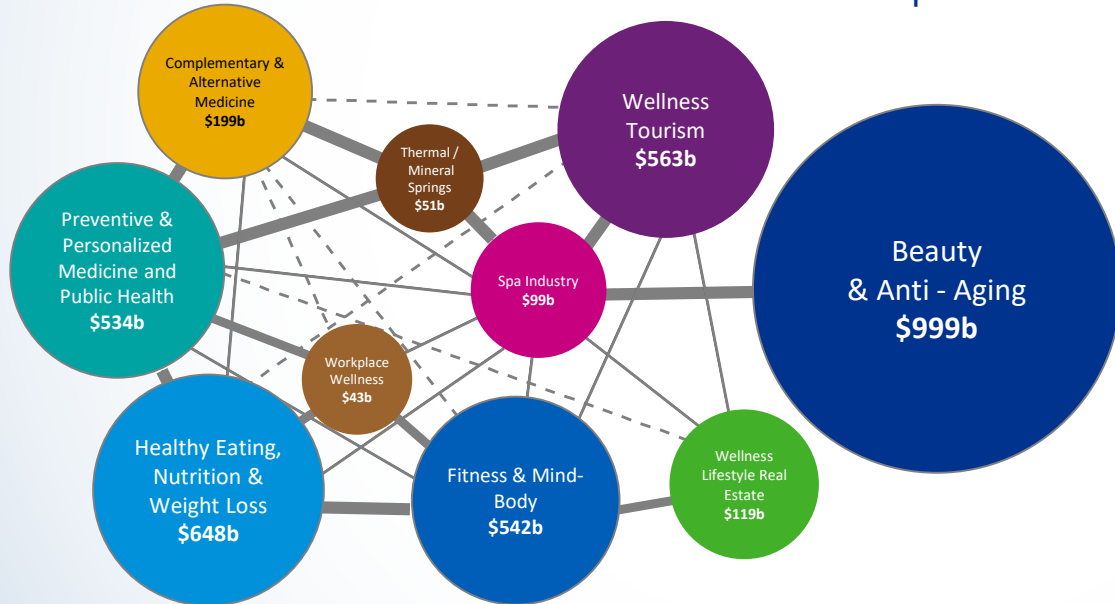
An average **10.4% of GDP** is spent on healthcare globally

Defined as activities, choices and lifestyles that lead to a state of holistic health

The wellness economy represents >5% of global economic output

The wellness economy was almost half the size of all global health expenditures in 2014

Between 2013 and 2015, the wellness economy grew by 10.6%



\$3.7 trillion
Global
Wellness
Economy



1

Values and universal healthcare of the UK



2

Primary care of Israel



3

Community services of Brazil



4

Mental health and wellbeing of Australia



5

Health promotion of the Nordics



6

Patient and community empowerment of parts of Africa



7

Research and development of the US



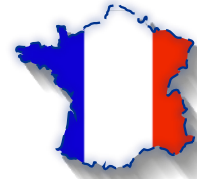
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Innovation, flair and speed of India



9

Information, communication and technology of Singapore



10

Choice of France



11

Funding of Switzerland



12

Aged care of Japan

- 1 **Prevention and promotion** across public and private sectors
- 2 Population and patient **segmentation** and **stratification**
- 3 **Scaled-up** primary care
- 4 **Centralised and localised** clinical services as necessary
- 5 Clinical pathways supported by **improvement science**
- 6 Workforce **development** and **motivation**
- 7 Hospitals as **health systems**
- 8 **Medical home** as a hub for aged care
- 9 **Community-based** mental health services
- 10 Patients as **partners**. Communities as **carers**. **A dignified death.**



1

Healthcare for all

A test of political will for the 21st century

2

Innovation at scale

The paradox of change is continuity

3

Bringing quality under control

The more I know, the less I sleep

4

There is no health without the workforce

Value walks

5

Patient power

Renewable energy for healthcare

6

Climate change

Healthier is cheaper is greener

7

Ageing

Every cloud has a silver lining



1

Genomics

From medicine for the average, to medicine for the individual

2

mHealth

Healthcare in your pocket

3

Retail revolution

The apothecary is back

4

Wearables

Rise of the healthcare consumer

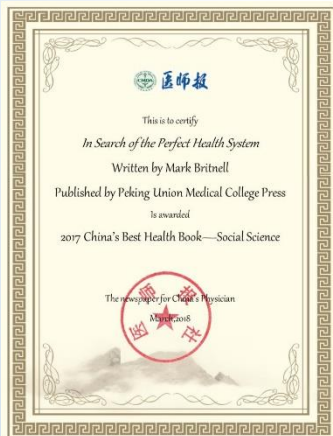
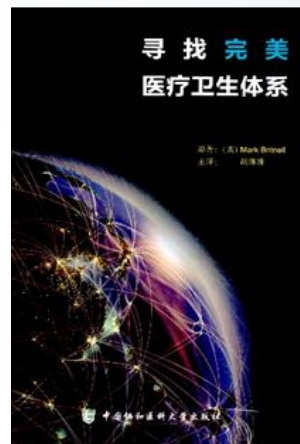
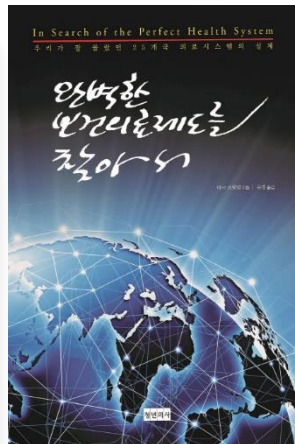
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Dignity in dying

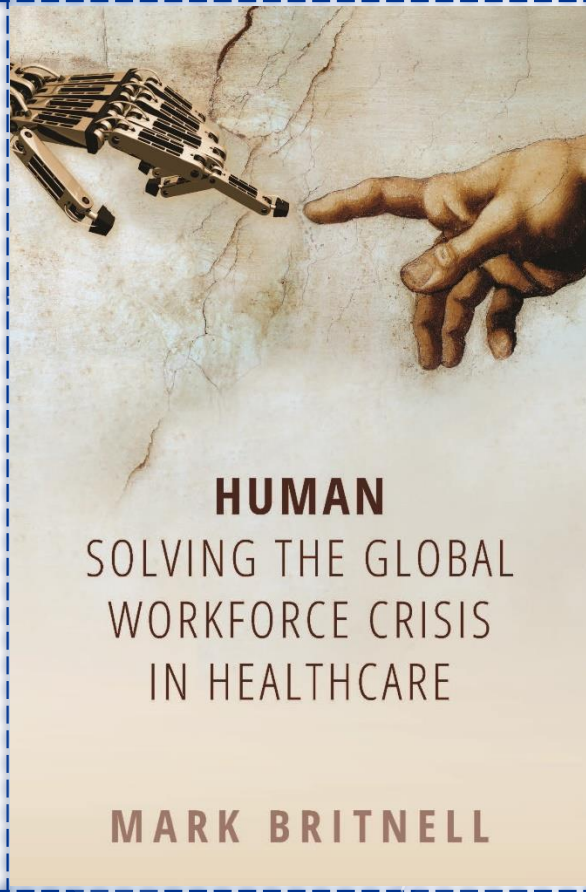
The final frontier

In Search of the Perfect Health System

Mark Britnell



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