Dr Alexis Roberts-McIntosh
Independent Global R&D Consumer Health & Wellness Executive
“SELF – CARE
THE PERFECT STORM ”

The Consumer Healthcare Industry’s Cure & Opportunity to Lead the New Integrated Health & Prevention Paradigm
Current Situation

Consumer Led Behavioural Trends

Global Regulatory Rethink in Self Care

Disruptive Innovation in Self Care

New Players in Digital Health & Wellness & New Channels Of Self Care Delivery
Current Global Health Care Prognosis

• Focus on Cost
• Access and Quality
• Poor or limited integrated health management whether state or private payers
Consumer Industry – Leap from Genteel Sports to Mixed Martial Arts
Bain & Company March 2108
The current situation in healthcare & wellness is unsustainable.
Agenda Needs to Pivot to Quality Health Outcomes

David Matthew Cutler is the Otto Eckstein Professor of Applied Economics at Harvard University
Typical Hospital Population Health Management (IMB Data/HIMSS 2016)
Cost GP Visits due to Minor Aliments for the NHS (PAGB)

- £2 billion is the cost every year of GPs appointments for minor ailments
- 57 million appointment every year are for self-treatable conditions
- 684 million hours of GP time
- £8.60 cost of a prescription whereas some drugs such as paracetamol, bought from the local pharmacy cost as little as £0.19
- 80% of patents said that they would have self cared for a minor alignment rather than going to the GP if they had known the cost to the NHS
- 6% of GP appointments could be dealt with through self care and visiting the pharmacy
- 13 Days is the average wait time for a GP appointment
Real Cost of Back Pain to Business and the Economy (MSK Toolkit)

In 2013, **more days** of sickness absence were attributed to back, neck and muscle pain than any other cause.

In 2013, **30.6m** days of sickness absence could be attributed to MSK.

23% of all working days lost.

33% of English long-term sickness absence is attributed to MSK.

In 2015, 13% of Employment and Support Allowance (ESA) recipients reported MSK as their main condition.

In 2010, ESA claimants with MSK were more likely than those with other conditions, to attribute their health conditions to work – 36% related it to work.

An estimated 9.5m working days were lost due to work related MSK, an average of 17 days lost for each case. This represents 40% of all days lost due to work related ill-health in 2014/15. Agriculture; construction; health and social care; and transportation and storage industries all show elevated rates of MSK.

The future of the NHS is at risk because the cost of treating diabetes could hit £17 billion by 2035, health experts have warned.

Public Health England there are currently 4.5 million people in the UK who have diabetes, mainly type 2, but that could rise to 5 million if obesity is not tackled.

The current cost of treating diabetes is £10 billion a year which is nearly 10 per cent of the health service’s entire budget.

The national clinical director for obesity and diabetes at NHS England Professor Jonathan Valabhji said: “We need to stem the tide otherwise we could see [a] crisis and there are issues of sustainability for the NHS if we do nothing differently.”
Disruption is already happening ..... Drivers of Change and Opportunity
Whom Are We Serving Now and the Future?
It is all about the Quality of Those 142 Years ...
Healthcare Payers & Providers Pivoting to Wellness
Implications:

- Future expanding role for Consumer Health
- Lowering burden in Rx/Health Services managing symptoms OTC
- Entering or partnering on Fitness, Wellbeing and Connected Health
A Great Opportunity to Offer more Integrated Diagnostics, Monitoring Health Wellness Solutions - ”The Pharmacist Needs to Step Out In front of the Counter”

John Smith CEO , PAGB
Global Consumer Led Behavioural Trends

1. Personal Ownership, Drive for Wellness & Prevention
2. Transparency - Clean Labelling
3. Natural Products & Platforms
4. Demand Better Environment Management - Minimizing Pollution Impact
Consumer Health: Time for a Regulatory Re-think?

Global regulatory authorities rethink on consumer self care and the potential role of OTC and Wellness health outcomes and opportunities to serve public health

Preventative care and behavioural science: the emotional drivers of healthcare decisions
Grasping the Opportunity to Deliver for the Consumer
CHC Play A Major Role Integrated Health Solutions to Reverse Type 2 Diabetes

Peter T
As a result of becoming diabetic I am now fitter and healthier than I have been for years. It is a funny world.
Fitness & Wellness Trackers YouGov & Mintel

• YouGov “the use of fitness/activity tracker devices has more than doubled, jumping from 8% to 17% of adults” in the UK.

• Mintel "18% of all adults have tried tracking their food/exercise habits with an app, while a further 25% would be interested in doing so in future.

• Health tracking brands have expanded their tracking capabilities to also help track the user’s mood, posing an interesting opportunity for other tech providers".
Stress Management Apps (Pebble Watch)
Walgreen Boots Alliance New Disruptive Launch
Based on predictions of employment and population,
Mintel estimates the market to achieve a total of £739 million in value sales in 2022.

Source: based on IRI/Mintel
Progressive Pain Management Self Care

Incremental  
Adjacent  
Advanced
New Disruptive Players in Integrate Health & Wellness
Late 2017 Amazon quietly released its own line of private label OTCs called “Amazon Basic Care”.

- Offers the same ingredients as brand name OTCs at a much lower cost and higher unit count per pack.

- Basic Care placed next to the brand name products they’re competing with.

- The Future Builds: Dash Buttons & Subscribe & Save.
Major Additional Disruptive Opportunities For Integrated Consumer Health

1. Senior-Specific Healthcare

2. Pollutants, Chemicals and Health

3. Healthcare for Office Workers
Personalized Wellness
Microbiome
Consumer Self Diagnostics & Monitoring
Genomics