

MARKET PREDICTIONS

5 ripple effects of better memory care

What if the health care industry implemented accurate, cost-effective, and widespread diagnostic screening for Alzheimer's and related dementias?

Currently the diagnostic process for Alzheimer's and other dementias is complex, costly, and capacity-constrained. This is mostly due to the fact that there is no single diagnostic test to confirm the disease. Additionally, there are structural barriers in place that inhibit access to testing: there is a lack of widespread billing and reimbursement for cognitive assessments, physicians have limited time to administer cognitive screenings, and there is an underlying reluctance to diagnose given the lack of a cure. Acknowledging that these are substantial barriers, we wanted to imagine a world where the health care industry overcame them.

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Read time – 15 min

Audience

- All health care organizations

The ripple effects

SECTION	PREDICTION	PURPOSE
01	More timely detection of memory loss	Widespread screening of individuals would lead to earlier detection of the biomarkers for memory loss diseases, even before symptoms arise.
02	Higher demand for primary care to deliver screenings and care coordination	Primary care practices would likely have to bear the burden of screening volumes, due to the relative lack of dedicated dementia care specialists like geriatricians, neurologists, and geriatric psychiatrists.
03	Higher demand for community-based resources to provide education and care management	Patients and caregivers will need access to educational resources and care management support following diagnosis.
04	The need for better cross-industry collaboration to reduce health equity barriers	Providers, drug manufacturers, and community-based organizations to improve their outreach to diverse populations to raise awareness on the benefits of early detection.
05	Increased pressure on payers to provide benefits and supports for individuals with memory loss and their caregivers	Employers and commercial payers will have to consider the implications of more pre-Medicare beneficiaries diagnosed early with memory loss.

01 More timely detection of memory loss

How this would play out

Widespread screening of individuals would lead to earlier detection of the biomarkers for memory loss diseases, even before symptoms arise.

Why we believe this

There are numerous benefits that result from timely detection. First, it allows for earlier intervention, which could delay the progression of memory loss by controlling conditions that can accelerate its progression such as heart disease, diabetes, stroke, high blood pressure, and high cholesterol. It also allows for better medical, financial, and legal planning for patients and caregivers. Lastly, earlier detection would increase the number of potential clinical trial and early post-market participants (i.e., the first post-FDA approval users), leading to increased innovation around treatments or cures. Post-market participants play a particularly important role in generating real world evidence since they are the first to use the drug after it has made it through clinical trials.

BLOG

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02 Higher demand for primary care to deliver screenings and care coordination

How this would play out

Primary care practices would likely have to bear the burden of screening volumes, due to the relative lack of dedicated dementia care specialists like geriatricians, neurologists, and geriatric psychiatrists.

Why we believe this

Many experts argue that primary care practices should handle routine cognitive screenings as part of the annual wellness visit. However, for primary care practices to meet the demand for universal early screening they would need a combination of less laborious screening technologies and more creative deployments of their own care teams. Nurse practitioners and non-clinical staff, like front desk administrators, can be trained to administer behavioral questions, test for cognitive skills, and provide education and support following the patient's appointment. This streamlines the screening process and helps everyone to work at top of license.

CASE STUDY

How Carilion Clinic used workforce and coding techniques to overcome cost challenges in memory care

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03 Higher demand for community-based resources to provide education and care management

How this will play out

Patients and caregivers will need access to educational resources and care management support following diagnosis.

Why we believe this

Community-based organizations, Medicare programs like PACE (Program of All-Inclusive Care for the Elderly), and MA supplemental benefit packages often provide this kind of support for individuals with dementia and their caregivers. These organizations will be pressured to assess their budgets to meet the increased need in resources for those with memory loss if better, widespread screenings were implemented.

04 The need for better cross-industry collaboration to reduce health equity barriers

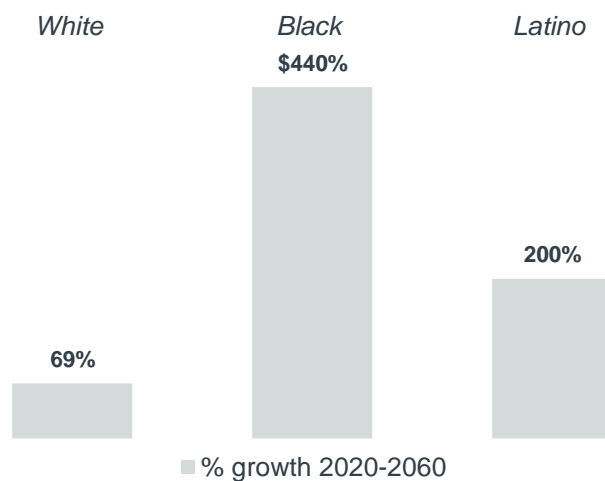
How this would play out

The prevalence of dementia disproportionately impacts women as well as communities of color. Better, widespread screening would enable providers, drug manufacturers, and community-based organizations to improve their outreach to diverse populations to raise awareness on the benefits of early detection.

Why we believe this

Lower rates of early diagnosis in under-represented groups is not due of lack of interest, but rather results from a need to overcome a lack of access to information. A more diverse pool of individuals could also mitigate equity issues downstream in the clinical trial space. Historically, clinical trial populations for memory care therapies have been disproportionately wealthy and white; however, diagnosing more diverse populations could lead to more diverse research participants and the collection of better data on treatments.

Percentage of people living in America with dementia



Source: [Better Brain Health through Equity: Addressing Health and Economic Disparities in Dementia for African Americans and Latinos](#), Milken Institute, 2021.

05 Increased pressure on payers to provide benefits and supports for individuals with memory loss and their caregivers

How this would play out

Employers and commercial payers will have to consider the implications of more pre-Medicare beneficiaries being diagnosed with memory care diseases.

Why we believe this

Individuals who continue to work as their disease becomes symptomatic may need additional benefits, including paid sick leave, short-term disability benefits, and a flexible spending account. Medicare Advantage plans would have a better sense of how many of their beneficiaries are diagnosed, even before symptoms may be triggered. This would enable them to cover therapies and practices that would save them money as their members' diseases progresses. Payers will have to think through how to create or structure strategic partnerships to maintain effective costs for memory care treatments—especially since providers may need help preparing for the influx of diagnosed individuals. Many plans are already working with home care providers to better manage patient populations, so this could be a good avenue to carve in at-home supports for memory loss.

Parting Thoughts

Although the implementation of accurate, cost-effective, and widespread screening would be a net positive for patients, it would challenge some parts of the industry. While this might seem like an impossible future, the world is moving fast in this direction. There have been rapid developments in using blood tests to measure the proteins indicative of Alzheimer's symptoms. Also, we also know that the rapid aging of the population and increased dementia is going to push more research to this space. Stakeholders will have to prepare and react to this changing environment.

Project director

Aaron Hill

hilla@advisory.com

Contributing research team

Elysia Culver

Eileen Fennel

Executive leadership

Sruti Nataraja

Miriam Sznycer-Taub

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