

Dementia Innovation Readiness Index

2018



As life expectancy rises across the globe, the burden of dementia will increase significantly. This is especially true in developing countries, which will be home to nearly 70% of people with dementia by 2050, up from 58% today. In recognition of this trend, the Global Coalition on Aging (GCOA) and Alzheimer's Disease International (ADI) focuses our 2018 Dementia Innovation Readiness Index on Argentina, Brazil, China, and India, as well as Saudi Arabia in recognition of its upcoming leadership of the G20 in 2020.

In 2017, we released the first edition of the Dementia Innovation Readiness Index – the result of an ambitious project to survey and analyze countries' readiness to develop and implement innovative dementia solutions across G7 countries.

Many of our findings from the G7 are equally relevant to the countries evaluated this year: Public leadership and funding for dementia innovation is insufficient, early diagnosis of dementia is not prioritized, and access to high-quality care is limited. But, for the countries we studied in this report, each of these shortcomings is compounded by additional challenges – economic disparity, geographic limitations, and in some cases, achieving human development goals.

The Index identifies specific challenges within each of the five countries as well as opportunities to promote innovation in the treatment and prevention of dementia and care for people and families impacted by the condition. Our findings are based on a series of expert interviews and a rigorous analysis of available data sources, and we are immensely grateful to the many people who contributed their time and insights.

We hope you will use the Index findings and recommendations as a tool to support advocacy, research, and public policies that can help alleviate the burden of dementia, and we welcome your feedback and sharing of best practices to accelerate this process.

Over the coming years, GCOA and ADI intend to expand the Index to cover all G20 countries. As we do so, we will continue to monitor progress in the countries we have studied and work to hold leaders accountable for fostering innovation readiness to improve the lives of people with dementia and their families.



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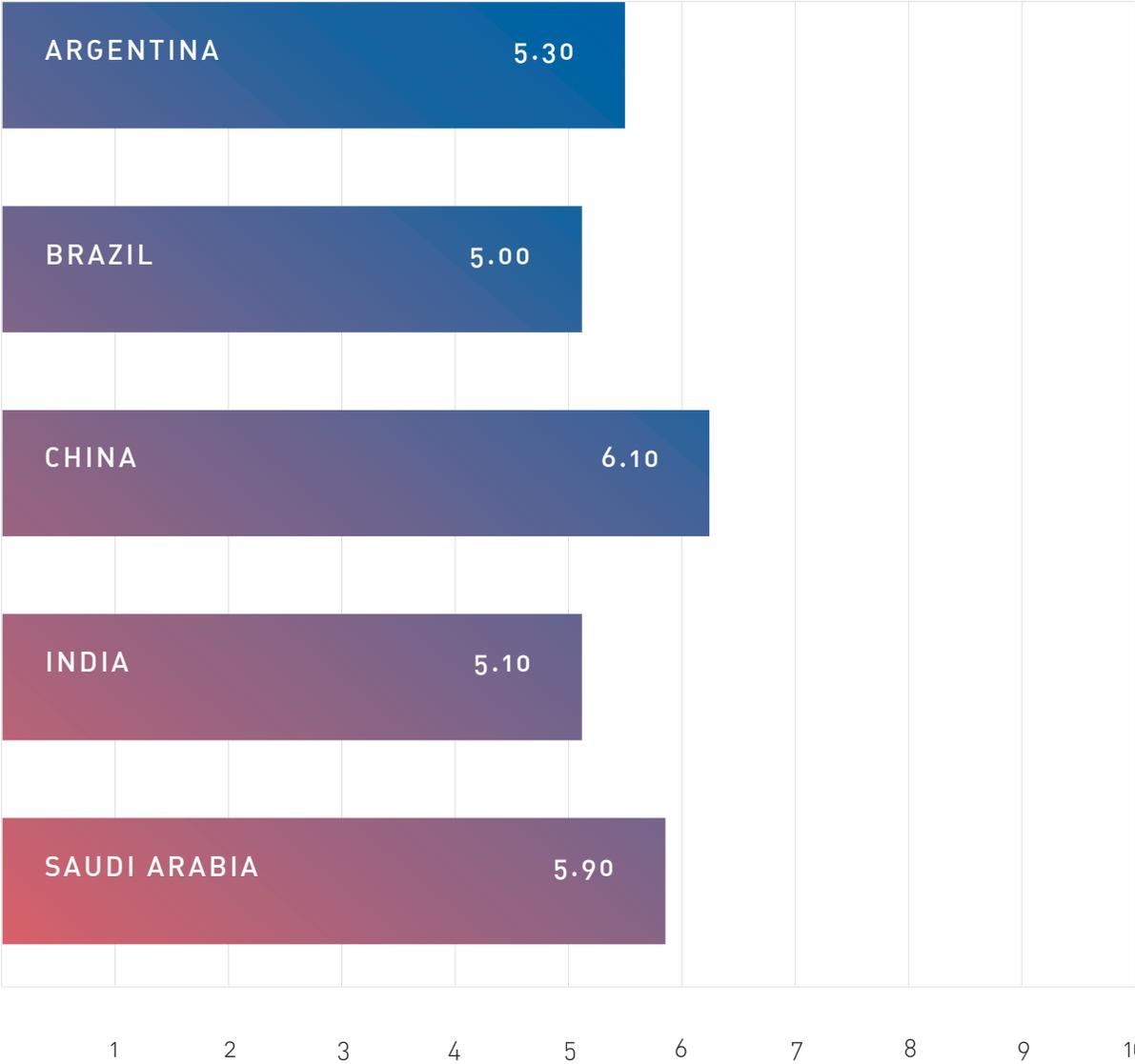
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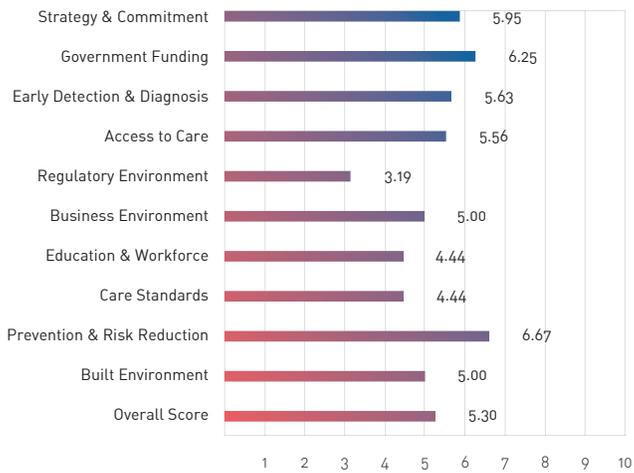
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Executive Summary: Index Snapshot

Below is a snapshot summarizing our overall findings on dementia innovation readiness in each of the five countries studied this year: Argentina, Brazil, China, India and Saudi Arabia. The snapshot is followed by more detailed category-specific findings. Further information about each country's response to dementia can be found in the report's detailed findings, which follow this executive summary and are accessible at www.alz.co.uk and www.globalcoalitiononaging.com



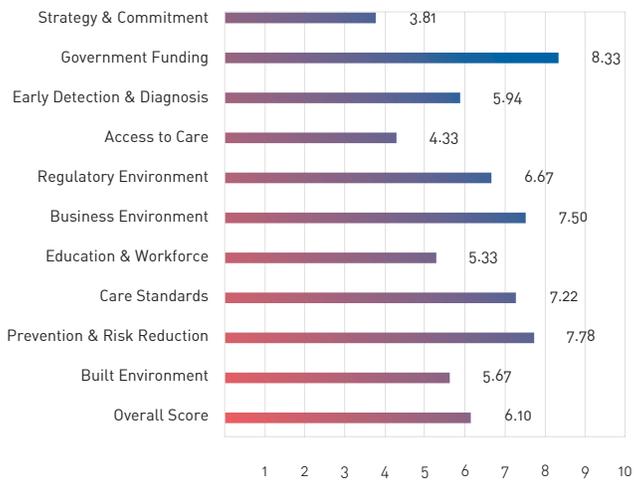
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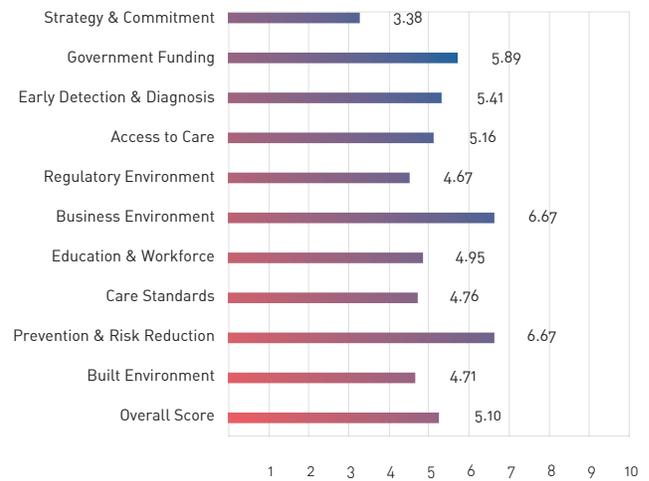
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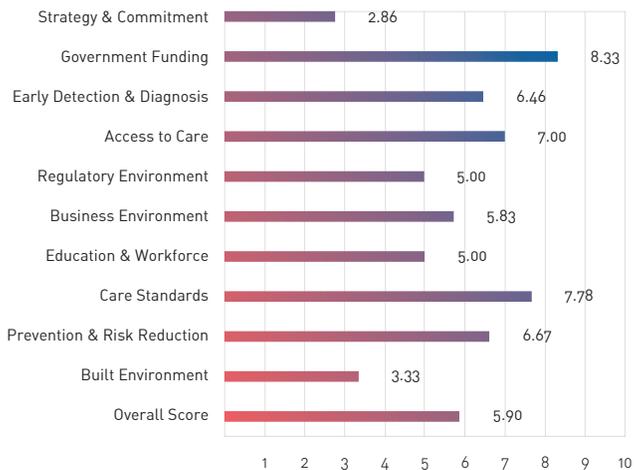
CHINA



INDIA



SAUDI ARABIA



Executive Summary: Innovation Category Findings

STRATEGY & COMMITMENT

Key Findings

Several of the five countries studied have started to address the challenges presented by rapidly aging populations, but dementia is not yet a focal point for most.

Some regional and local governments outpace their national governments in prioritizing and responding to dementia.

Non-governmental organizations, universities, and non-profits are helping fill the leadership gap left by government.

In countries with areas of extreme poverty, the top government priority is achieving basic human development goals, crowding out attention on dementia.

Call to Action

Countries must create and implement dementia plans, which are critical to aligning priorities and enabling innovation.

GOVERNMENT FUNDING

Key Finding

Government funding for dementia research and care is relatively low and not focused on discovering innovative solutions for dementia.

Call to Action

Governments must develop comprehensive funding strategies for dementia research that prioritizes innovation.

EARLY DETECTION & DIAGNOSIS

Key Findings

Under-diagnosis of dementia is a significant challenge in the countries studied.

Low awareness of dementia among health care providers and the general public delays detection, diagnosis, and treatment.

Countries do not have adequate systems to track dementia diagnoses, share information among health care providers, and optimize patient care.

Due to distrust, lack of information, and under-diagnosis, people with dementia are not effectively recruited into clinical trials.

Call to Action

Stakeholders must raise awareness of dementia across society to promote timely diagnosis and access to care.

ACCESS TO CARE

Key Findings

Geography and economic status dictate an individual's ability to access high-quality care.

In traditional societies, caregiving is typically considered a familial duty rather than utilizing professionals with specialized training and expertise.

Call to Action

Governments, payers, and providers must establish care pathways that help people with dementia receive appropriate support from skilled caregivers as the condition progresses.

REGULATORY ENVIRONMENT

Key Finding

Regulators in the five countries studied generally support the findings of the U.S. Food and Drug Administration (FDA) and the European Medicines Agency (EMA).

Call to Action

Governments must fund regulatory agencies to ensure the timely approval of therapies introduced in other markets.

The patient voice should be better integrated into the drug review process.

BUSINESS ENVIRONMENT

Key Finding

There are currently few incentives for the private sector to invest in developing innovations and overcoming access barriers.

Call to Action

Stakeholders should improve the market environment in all countries to support private-sector investment in innovative solutions.

The private sector can catalyze technological innovation, including data sharing and medical records platforms, which will be an essential tool to improve dementia diagnosis and care.

EDUCATION & WORKFORCE

Key Findings

Health care education and workforce training includes limited availability for geriatric training programs and little dementia-specific training.

There is a missed opportunity to fully utilize non-physician professionals to provide dementia-related care and services.

Call to Action

Geriatrics, including information on dementia, should become an essential aspect of training for all medical providers, health care service providers, and related professionals.

CARE STANDARDS

Key Finding

Even where governments have implemented care standards, additional efforts are needed to improve the quality of dementia care.

Call to Action

Governments should support rigorous standards and innovative funding models to improve access to high-quality care specifically for people with dementia.

PREVENTION & RISK REDUCTION

Key Findings

As national populations age, dementia is an increasingly critical element of public health surveillance – but data remains limited in the reviewed countries.

Raising awareness will be the foundation of innovation readiness in the countries studied.

Call to Action

Risk reduction strategies for dementia should be integrated into broad or multi-condition health campaigns.

BUILT ENVIRONMENT

Key Finding

Mobility options, a key part of community living support, are limited for people with dementia.

Call to Action

Stakeholders should support the creation of dementia-friendly communities to support independence and community living.



ADI is the international federation of 90 Alzheimer associations around the world, in official relations with the World Health Organization. ADI's vision is prevention, care and inclusion today, and cure tomorrow. ADI believes that the key to winning the fight against dementia lies in a unique combination of global solutions and local knowledge. As such, it works locally, by empowering Alzheimer associations to promote and offer care and support for persons with dementia and their care partners, while working globally to focus attention on dementia and campaign for policy change from governments. For more information, please visit www.alz.co.uk.



The Global Coalition on Aging aims to reshape how global leaders approach and prepare for the 21st century's profound shift in population aging. GCOA uniquely brings together global corporations across industry sectors with common strategic interests in aging populations, a comprehensive and systemic understanding of aging, and an optimistic view of its impact. Through research, public policy analysis, advocacy, and strategic communications, GCOA is advancing innovative solutions and working to ensure global aging is a path to health, productivity and economic growth. For more information, visit www.globalcoalitiononaging.com.