

FUTURE OF HEALTHCARE

For a recent engagement, Toffler Associates developed a 2030 view of the Future of Healthcare. Through primary and secondary research, five major developments were uncovered that stand at the convergence of societal shifts and healthcare. These developments then informed the alternate futures scenarios that were catalysts for a product ideation and innovation process.

LONGITUDINAL PERSPECTIVE

New science insights and more comprehensive data sets create a better understanding between determinants of health and health outcomes. This enables screening and prevention to become a focus for the healthcare system.

*Doctors today focus on taking care of sick people, but in the future, the needle will move towards **preventative care**.*

– Expert in Medicine

- The definition of “healthcare” expands to a comprehensive, preventative care and pre-symptomatic model, enabled by understanding and monitoring determinants of health and interventions earlier in the causal chain.
- Increased appreciation for integrating genetic, biological, behavioral, mental health, socioeconomic, and environmental factors into complementary preventative care and disease treatment.
- Greater non-symptomatic engagement with the healthcare system due to screenings, monitoring, and predictive capabilities.

VIRTUALIZATION AND CONNECTION

Our lives are increasingly lived in the virtual space, technology converges with our bodies, and ubiquitous devices are all connected to a global network. This blurs the lines between physical and mental spaces, ourselves and technology, and location and activity.

*There's so much **telemedicine** now... This has presented huge savings. As much as providers can push to the home, they will, and hospitals will be used mainly for acute care.*

– Expert in Pharmaceuticals

- Providers can reach new populations in the virtual space, often accompanied by new cost structures and care models. This can also provide relief to labor shortages.
- Increased tensions and friction in navigating the new location-less environment; increased pressures to remove geography-based licensing.
- Technology, such as telehealth, digitized personal health records, and monitoring devices, creates the “connected patient,” improves access and reduces costs of services, tests, consults, and treatments.

DATA EXPLOSION

The nodes by which we collect data continue to expand and become more personal...and invasive, closing the gap between the real world and its digital representation. This creates the raw material for advanced analytics and new insights but also raises privacy, bias, dependency, and replacement concerns.

*There is a growing amount of **aggregation of health services companies and big data focused companies**. You're going to see a radically new system of health data coming in because it needs to happen.*

– Expert in Big Data Technologies

- New data sets and improving artificial intelligence (AI) capabilities creates significant opportunities for AI-enable healthcare to improve outcomes and manage costs; and disrupt traditional market structures and practices.
- Always-on and personally integrated technologies connect, enable, and monitor environments and human behavior, providing insights on the cause-and-effect relationships between determinants of health and health outcomes.
- Rising fear that health data could be used against patients (e.g., harmful behaviors, genetic markers) or hold providers liable (e.g., not acting on data) creates friction on the expansive use of new data.

AUTHORITY AND POWER SHIFTS

Greater transparency, performance gaps versus expectations, and perceived misalignment of goals cause traditional structures and institutions to lose the trust of society. This drives people to look for new sources of authority and informal collectives, enhanced by virtual tribalism, gain power.

*Trust starts with **transparency** - what happens with the data and how the data helps other people. [Providers] must be clear about **how the data is being used** and **how the decisions are being made**.*

– Expert in Healthcare Consulting

- Greater data and insights on determinants of health causes people to increasingly seeks health-related information and advice from non-certified sources such as health coaches, websites, celebrities, and online forums.
- Politicization of healthcare and perceived ineffectiveness of policies (e.g., outcomes, cost, quality) create challenges for incumbent institutions and demand for policy changes without a consensus on desired revisions.
- Information transparency, increased access to personalized health data and greater care choices create new competitive forces and industry power dynamics.

ACCESS DISPARITIES

Societal segmentations, whether structural or self-imposed, creates conditions for unequal access to information and healthcare. This further exacerbates the inequitable distribution of healthcare as it becomes more digitally enabled and highlights the gap between the haves and have-nots.

*If you have adequate health insurance and are health literate (which is about 12% of the population), and if you have a safety net (e.g., someone who can lend you \$5000), you might be okay. **Everyone else who isn't okay is what keeps me up at night.***

– Expert in Oncology

- Cost pressures lead to significant business model innovation as new approaches to optimizing outcomes and access for the greatest number of people drive solutions that disrupt traditional industry structures, including methods to expand both virtual and physical access.
- Access and payment concerns expand to screening and prevention, in addition to treatments, as more is learned about determinants of health and early interventions become a growing part of healthcare services.
- Evolving treatments (e.g., biologics) and approaches to health, and their high costs, force foundational shifts in access and payment models.

WHAT IS YOUR GAME PLAN?

Are you prepared for...

A more expansive definition of healthcare?

Emerging players and shifting power dynamics across the healthcare industry?

New consumer and patient value propositions?

CONTACT

Jasmine Niernberger

jniernberger@tofflerassociates.com

+1.202.413.3163

Do not allow your mind to be imprisoned by majority thinking. Remember that the limits of science are not the limits of imagination.

- Dr. Patricia Bath

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