

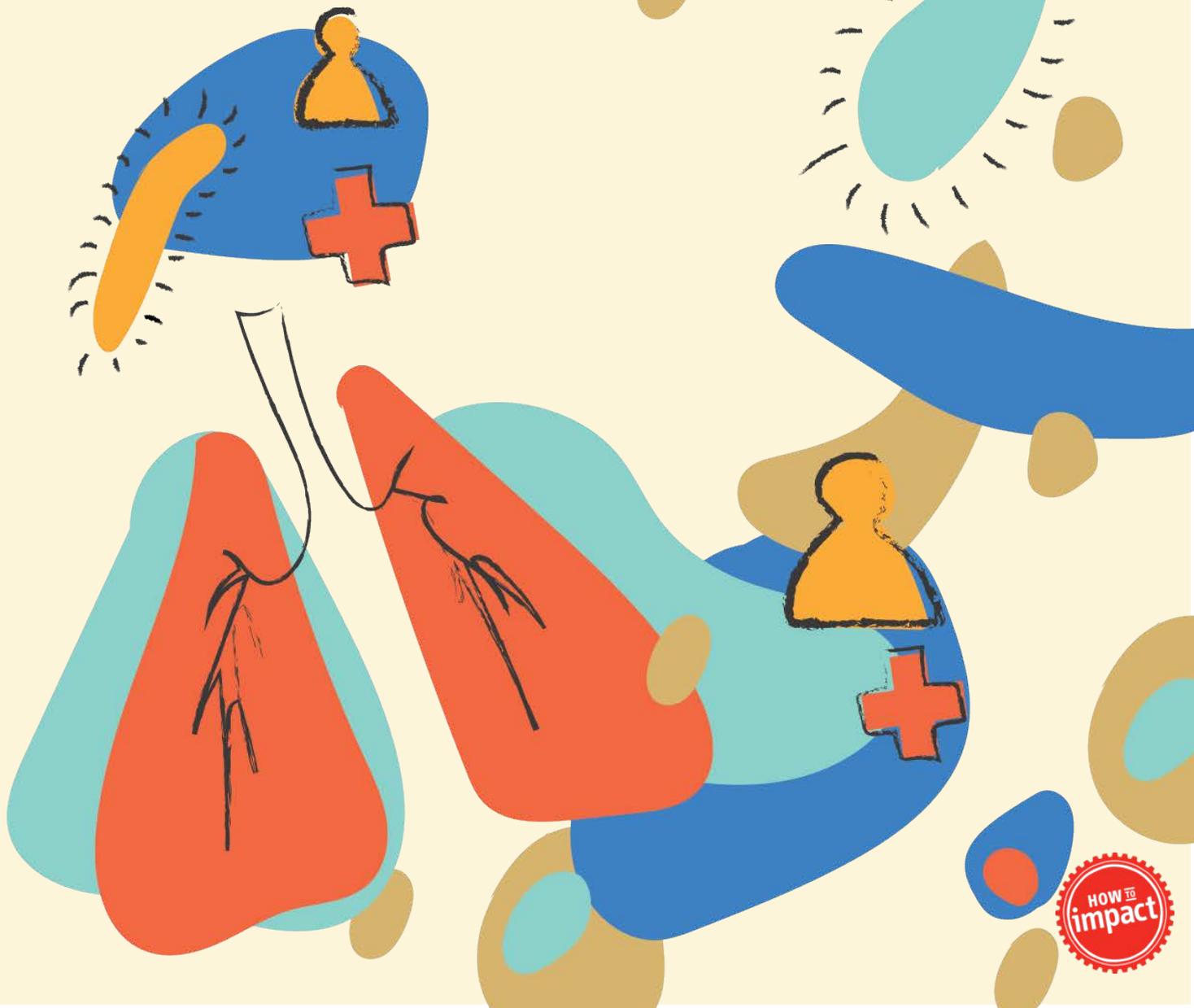
The Patient Takes Power

A User-centric Disruption of Healthcare

10 Predictions for the 2020s

FEBRUARY 2020

How To Impact

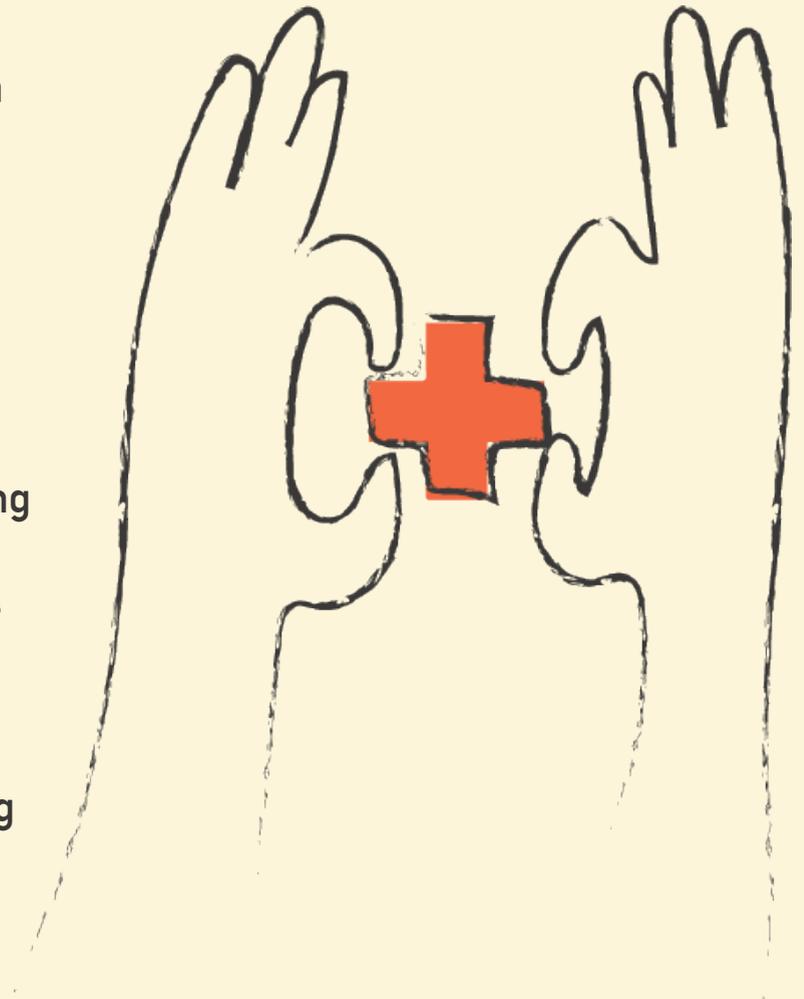


Power Goes to the People

Forget Dr Google - the next revolution in healthcare will see a true transfer of knowledge and actionable authority into patient's hands.

From AI-aided diagnosis to DNA-driven prescriptions and 360° integrated digital care models, technological innovation is creating unprecedented opportunities for end-users to 'own' their wellness outcomes.

At the same time, healthcare players in every sector are placing more emphasis on putting user-centric care at the heart of their organization.



A New World Order

In the coming years, the patient will no longer have just information at their fingertips, but become truly empowered to take a more active role in preventing, recognising, treating and managing their health outcomes.

For better or worse, these new power dynamics will fundamentally transform the healthcare landscape... *But what exactly will this future look like in practice?*

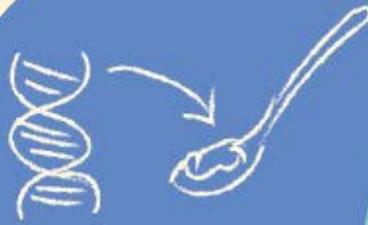
Read on to discover what the coming decade may hold.



10 Predictions for the 2020s



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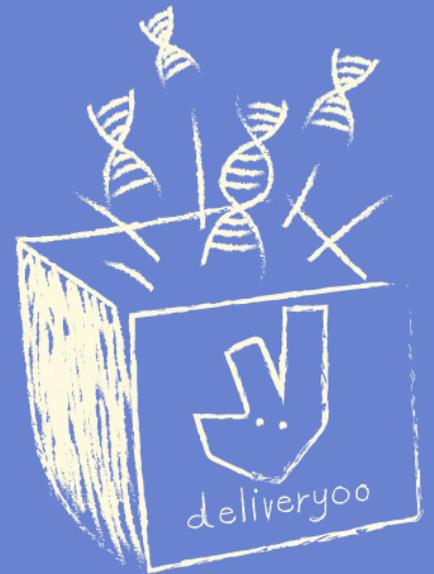
06 Crowdsourced Health



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01

Prescription Lifestyles



Imagine having your food, gym, insurance, medicine and therapy all curated into one perfect wellness package - designed just for you.

We've already seen the explosion of consumer DNA testing, but how easy is it for the individual to put these learnings into practice?

Expect the next wave of personalised consumer-wellness solutions to focus on creating seamless pathways from knowledge to action.

How will things change?

- Hyper-personalised 'treatments' go holistic – encompassing every aspect of your life
- Growth of integrated wellness subscriptions – think 'prescription meal kits' that tailor food recommendations to exact requirements AND deliver each meal to your door
- Eroding lines between the consumer goods industry and the healthcare sector
- Rise of mega wellness brands that 'own' your health profile... and leverage it to deliver customised wellness solutions for every facet of life

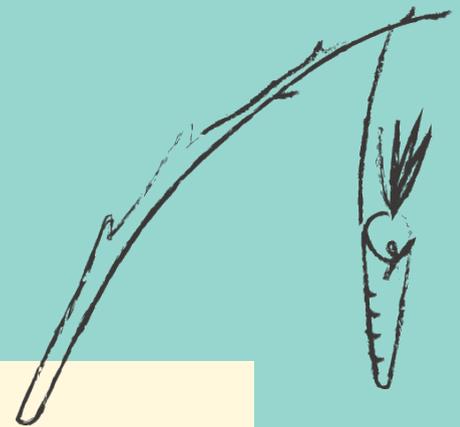


02

Invisible Intervention

From CRISPR to AI-Diagnosis and 3D Printed Heart Valves, there's much to get excited about in the innovation of med-tech, but mainstream adoption relies as much on behavior change as raw capability.

True transformation of the sector will come with a re-imagining of the experience that surrounds care delivery. Think frictionless service solutions that operate in the background of your life without you even knowing it. Care you don't see, delivered when you least expect it.



How will things change?

- Environmental and experience design becomes an integral part of the treatment toolkit (not the secondary service experience afterthought)
- Gamified feedback loops become the norm - driving behaviour change and encouraging compliance with treatment regimes
- Hidden 'nudges' create forced treatment protocols where the end-user doesn't know their behaviour or routine has been modified
- Always-on healthcare interventions close the gap between the disjointed delays of the 'treat, wait, diagnose... treat, wait' model



03

Healthcare Anywhere



The shift towards diversified, democratised and decentralised care delivery at an industry level will lead to the death of the 'Health Hub' as we know it.

Instead of going to the clinic or the hospital, will your care network will come to you? Instead of your GP acting as the central hub of your care team, will we each sit at the centre of an interconnected network of care providers?

How will things change?

- Decline in centralised physical health 'destinations'
- Shift towards deep specialisation and dedicated health services – think hospitals and practices that focus only on one condition area
- Rise of non-traditional, convenience-first access points for healthcare – from pop-up practices to vending machine pharmacies, traveling EDs and check-up spots alongside your groceries or at your local gym



04

Quantified Patient-Self



Forget counting steps and calories. In the future, every aspect of our lives will be measurable, traceable and reportable.

For better or worse, this closing gap between 'cause' and 'effect' will inevitably bring new levels of transparency to the health impact of every decision we make, everyday.

How will things change?

- Productisation of long-term wellness programs – piggy-backing off new traceability in symptoms (weeks, months, years and decades apart from their root cause)
- Growing transparency amplifies health-anxiety – giving rise to a 'health-orexia' epidemic, where people struggle in a race towards perfect wellness
- Emergence of a new breed of conditions spurned by over-intervention and over-treating of health risk-factors that otherwise would have gone unnoticed
- Rise of wellness 'overdoses' – as extreme users double-down on preventative medicines and natural remedies



05

Well-conomics



With an amplified focus on prevention and transparency, expect the rulebook for healthcare monetization to be re-written.

Imagine a new healthcare paradigm that sees you pay for the illness you successfully avoid, rather than paying for the treatment of what you have... or a 'Lifestyle Debit and Credit' insurance model that penalises bad behaviour with higher premiums and rewards you for the good.



How will things change?

- Emergence of a two-sided care economy where the delivery of healthcare services is subsidised by the monetised value of aggregate patient data collected
- Further commoditisation of patient data into marketplaces for 3rd party researchers and corporates
- Rise of subsidised wellness services as governments and insurance providers race to drive down treatment expenses by encouraging healthy life habits – think an insurer that actually pays you for each gym visit
- Hedonists go off the grid to avoid penalty for bad health behaviour and opt out of all data capture networks



06

Crowdsourced Health



Our biggest health revolutions of the decade will come from outside the system – not within it. Expect to see a new legion of grassroots med-tech disruptors who are fed up with the traditional slow-moving bureaucracy of medical innovation... and doing something about it.

By breaking all of the rules of traditional research and development, we'll see accelerated paths to commercialisation driven by the end-user themselves.

How will things change?

- Shifting power dynamics as new innovators in the medical space crop up with zero medical background – think engineers, coders, technicians, designers and hackers
- Rise of crowd-sourced research and product development... allowing individual patients to own a stake in the development of the pharmaceuticals and med-tech they use every day
- Proliferation of underground and grey-market wellness alternatives become the new version of 'generic' meds



07



Division of Doctor Labour

Medical diagnosis and treatment is becoming increasingly technology-led, but the need for human connection and care will not disappear.

Rather the traditional role of the 'doctor' will be split.

- Those who have empathy skills and good bed-side manner will be the human touchpoint to the health system – the 'front-of-house' care.
- Systems developers, engineers and technologists (and even the AI itself) will become the new 'back-of-house' - the analysts, diagnosticians and prescribers.

How will things change?

- Emergence of 'healthcare concierges' - medical professionals whose training focuses on empathy, communication and behavior change
- Silo-isation of decision making – creating new barriers to integrated care (even as the old ones are being torn down)
- Polarisation of treatment approaches from doctors in each school of thought... either fundamentally grounded in the patient's preferences, or completely divorced from the patients wants and needs
- Rise of clinical 'back-of-house' roles that are intentionally divorced from the patient to minimise cognitive bias in treatment decisions



08



Happiness: The New 'Vital Sign'

The link between stress, illness, mental health and overall wellbeing will continue to gain prominence over the next decade. With prevention in mind, 'happiness' will become a key indicator for overall health.

When visiting the doctor, it won't just be your blood pressure and temperature, but your 'happiness levels' that will be taken.

How will things change?

- Treatment spaces and experiences are re-designed with a focus on helping people relax and reset their mind state
- Backlash against formal modern medicine (and the anxiety that comes with knowing what's on the health horizon)
- Rise of 'Emotional Prescriptions' – clinical recommendations that focus on treating emotional symptoms with behavior change over pharmaceuticals
- Renewed recognition of alternative and eastern medicine principles in the mainstream health dialogue
- Embracing of the 'placebo' as a positive anxiety-alleviation technique (not a rip-off)



09

Well-chitecture



Health will no longer be the remit of just healthcare providers. Instead every organisation, service provider, institution and public space will be held responsible for physiological and mental effects they have on everyone they touch...for good or bad.

This new dynamic will give rise to a next-gen corporate social responsibility model which demands a conscious re-designing of experiences to reduce stress, minimize environmental harm and encourage healthy habits.

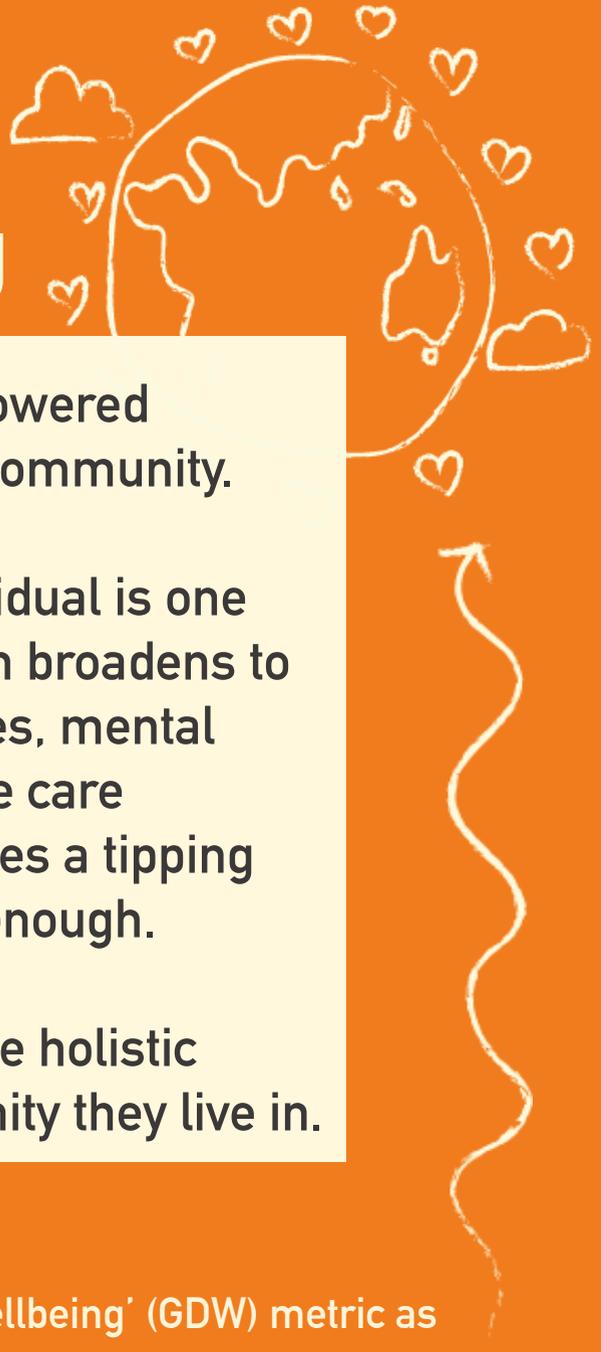
How will things change?

- Tariffs introduced for public spaces that encourage unhealthy habits – think penalties for overuse of escalators in building design
- Workplaces optimised for a healthy lifestyle – rise of the 4-day work week
- Council areas rated on the well-chitecture of the local precinct
- New subsidies and Medicare benefits introduced for those living in wellness ‘black-spots’
- Rise in health insurance premiums based on where you live - amplifying inequality in areas with poor wellness ratings



10

Collective Wellbeing



The ultimate extension of the empowered individual will be the empowered community.

Treating the symptoms of the individual is one thing. But as the definition of health broadens to encompass every aspect of our lives, mental wellness moves to the centre of the care dialogue and urban isolation reaches a tipping point, one-to-one care will not be enough.

Instead we will need to consider the holistic wellbeing of the extended community they live in.

How will things change?

- Emergence of a 'Gross Domestic Wellbeing' (GDW) metric as a signifier of a country's long-term success
- Rise of micro-donation marketplaces that allow individuals to put time and expertise into solving smaller-scale wellness challenges historically overlooked by the big industry players
- Proliferation of grass-roots social wellness enterprises – think gardening groups or community cooking initiatives that encourage healthy habits and promote social connection



In a decade that will no doubt see massive paradigm shifts in healthcare, the one thing we can be sure of is that unpredictability will rise in the 20's.



We'd love to help you future-proof your strategy for 2020 and beyond. We offer a number of targeted workshops to help organizations accelerate their thinking - and begin to develop an action plan for transformation in as little as 2 hours.

Get in touch to find out more.



Let's make something amazing together.



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