



Five Potent Predictions Reshaping How Consumers Engage Healthcare In the Coming Decade

revive

Today's discussion




The set-up



Five predictions



What's next



Q & A

The inspiration

- Between industry transformation, social justice movement, and COVID-19 – *so much change!*
- What will the next decade hold?
- Identify 4-6 provocative predictions
- Initially focused on marketing and branding, but research and discussion highlighted a higher level of consideration



RESEARCH

Three months of exploration

- Deep dive online
- Revive team member contributions
- Primary research
- Covered everything from hospitals and healthcare to consumer behavior and societal trends
- More than 260 resource citations

Industry input

- 22 interviews
- Multiple health sectors
- Multiple POVs
 - CEOs
 - CMOs
 - Brand/design leaders
 - Clinical leaders
 - Venture capitalists
 - Entrepreneurs
 - Consultants
 - Researchers

**Geisinger
Mayo Clinic
Cleveland Clinic
Johns Hopkins Medicine
Intermountain Healthcare
Duke Health
Henry Ford Healthcare
Bon Secours Mercy Health
Cincinnati Children's
CVS Health
Bain Capital
Optum
Sesame Health
Bright Health
DXTRA**





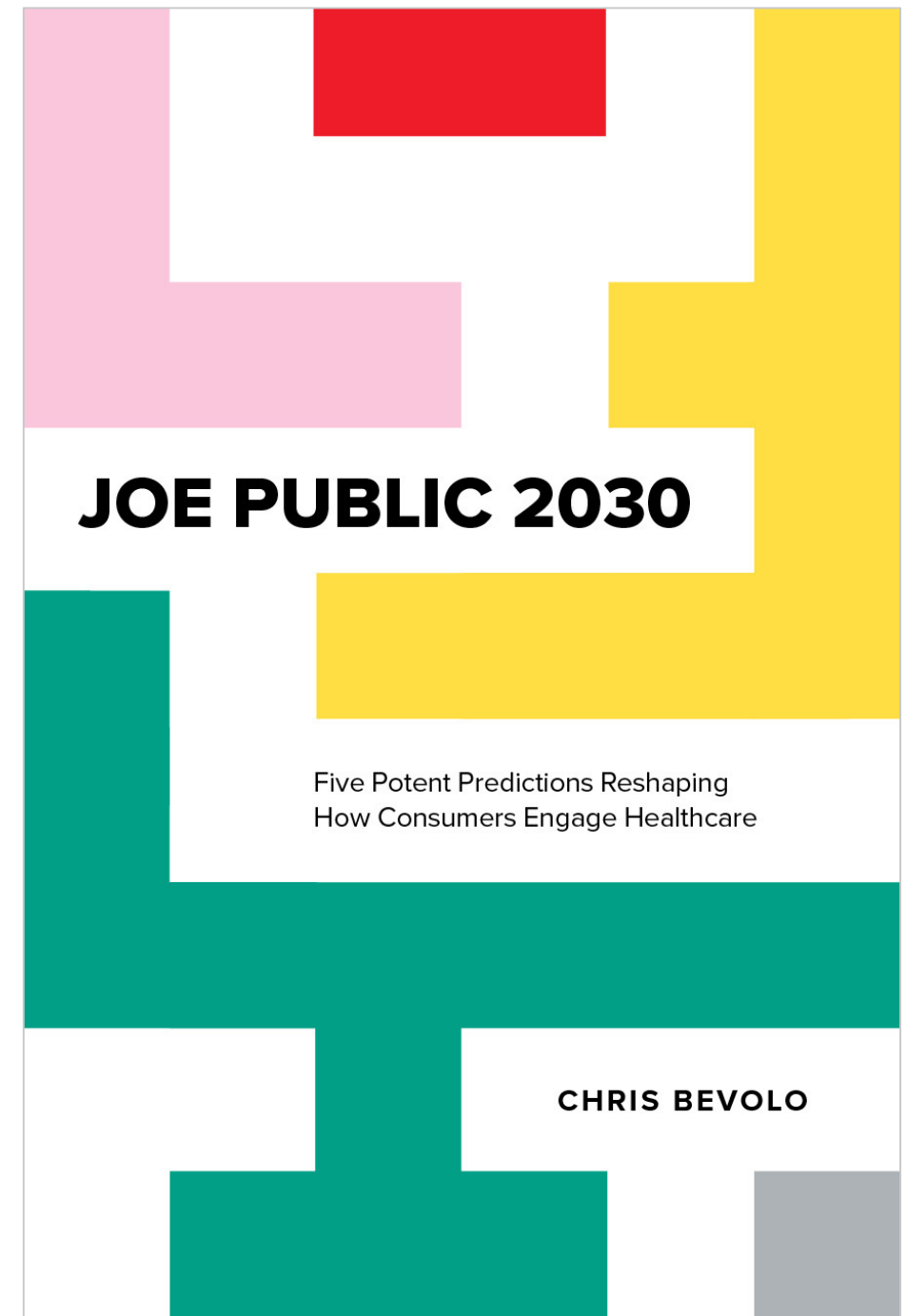
TEAM 2030

Developing the predictions

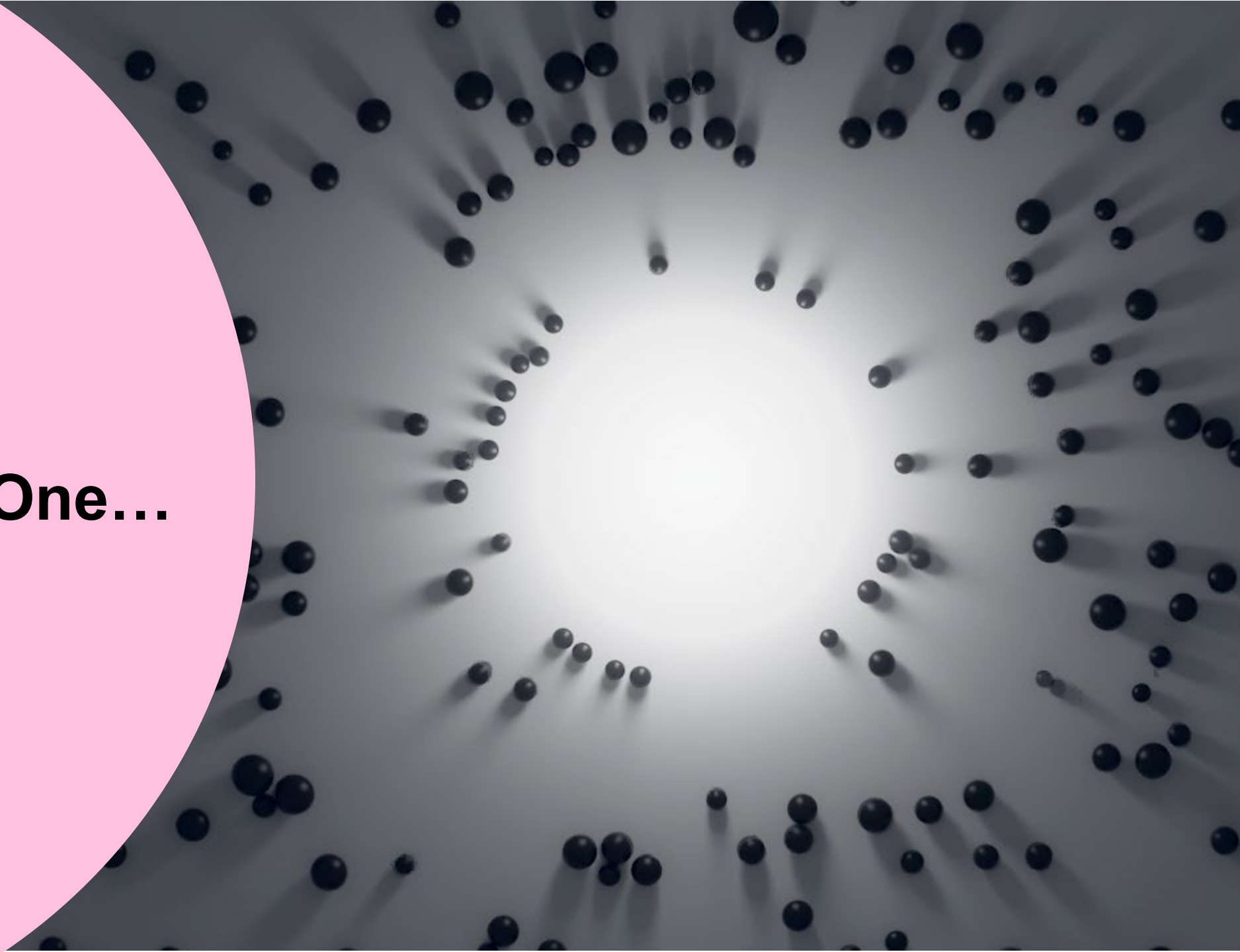
- Dozen top thinkers acting as futurists
- Intentional diversity
- Followed process from *Non-Obvious Megatrends* (Bhargava)
- Two-month process, five 3-hour workshops

Five bold predictions

- Focused on how consumers will engage in their health
- Based on 20 foundational trends
- Not meant to be comprehensive or interdependent
- Not super deep dive into specific areas (e.g. AI)
- Five bold predictions that would have the most impact in driving conversation



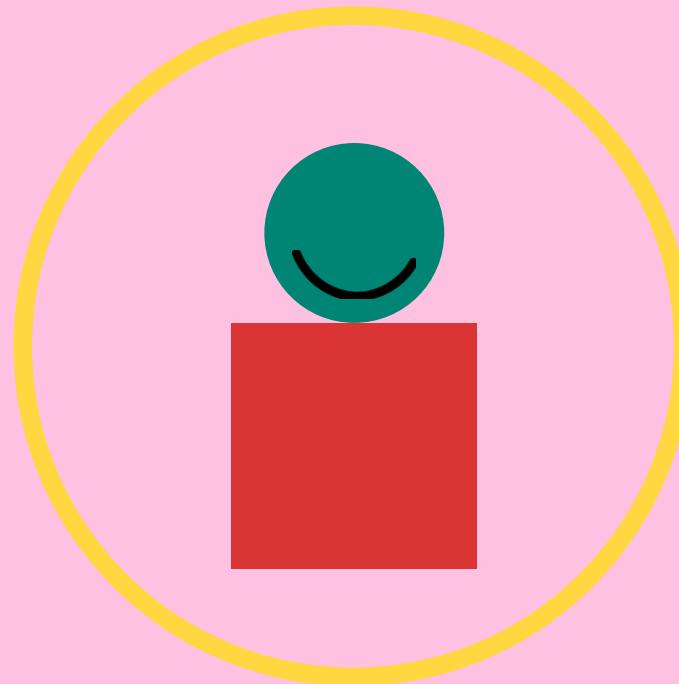
Prediction One...



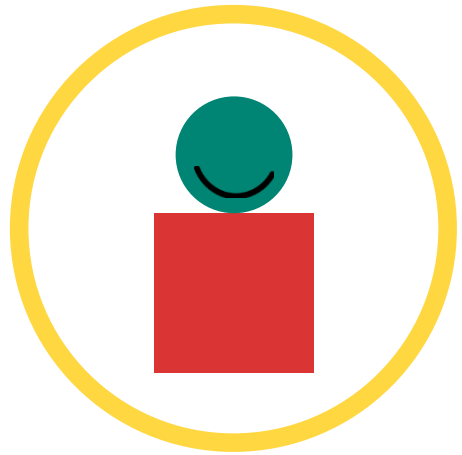
“This consumes a lot of our oxygen at Geisinger – it’s at the forefront of everything we do.”

*– Dr. Ryu, CEO,
Geisinger*

The Copernican Consumer



PREDICTION ONE



The Copernican Consumer

- Truly personalized, consumer-centric healthcare
- Dispersion of care
- Block-chain enabled holistic health view
- New AI-driven “Betterment” platforms for personal health management
- The “Barbell Effect” on clinicians

Prediction Two...



PREDICTION TWO

“It’s been 20 years plus since we first started talking about the power of consumerism, and guess what – it ain’t gonna happen.”

– Wendell Potter author

Constricted Consumerism



PREDICTION TWO



Constricted Consumerism

Two decades of waiting for consumerism's true impact

Continued role of employers and payors as ultimate “customer”

Consumers will be further funneled and restricted by payors

Consumers will be further funneled and restricted by providers

Consumers will continue to struggle to act as...consumers

Prediction Three...

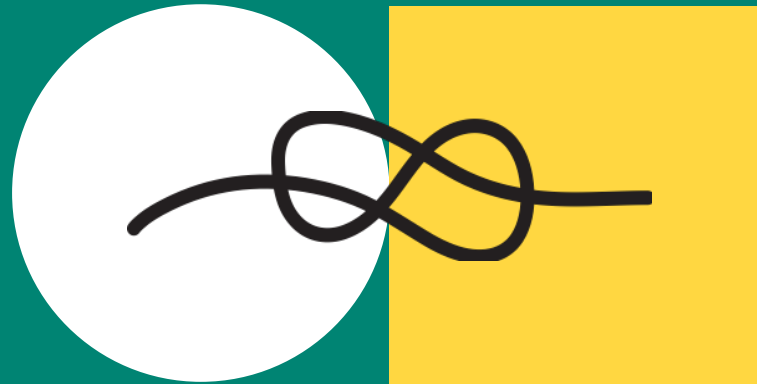


PREDICTION THREE

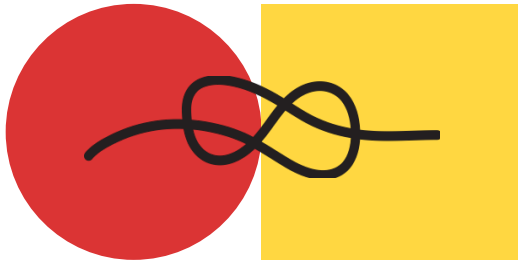
“In the race to truly own the ultimate consumer relationship, those who have to gain knowledge will get there faster than those who have to change culture.”

— Russ Meyer
Sen. Dir. Brand Strategy
CVS Health

The Funnel Wars



PREDICTION
THREE



The Funnel Wars

Legacy health systems no longer just compared to consumer brands, they're now competing with them

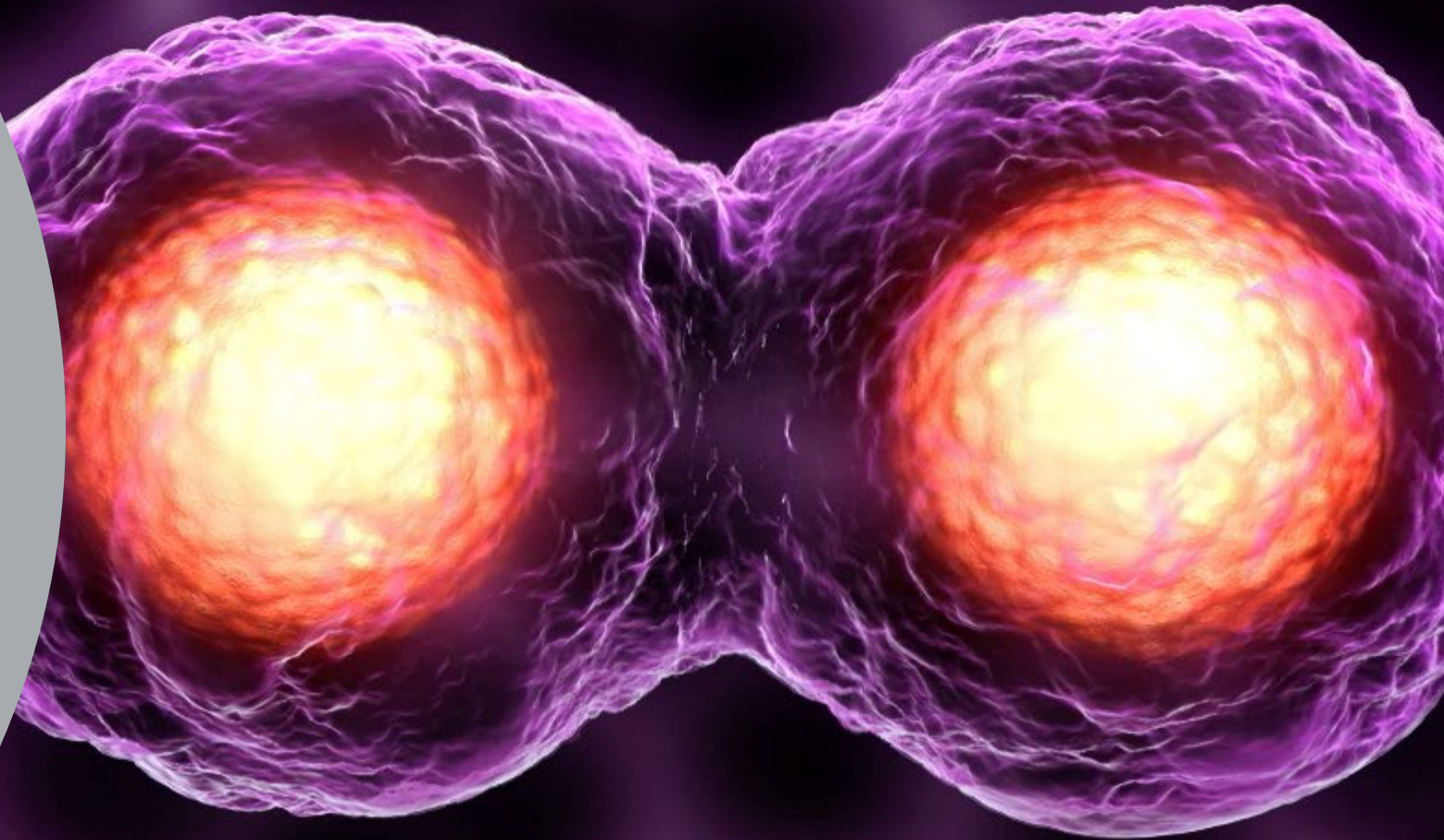
Billions in VC/PE money pouring into space

Payors now direct competitors

Other than few large integrated systems, many legacy providers face losing patient relationship and becoming "downstream vendors" of care – this will be a market-to-market battle

New entrants have the upper hand – culture vs. knowledge

Prediction Four...

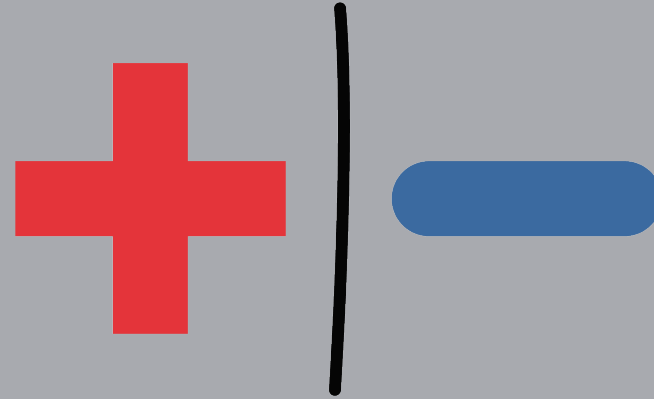


PREDICTION FOUR

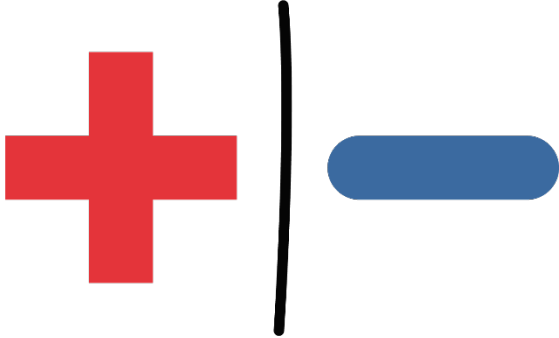
“If we can’t retain a shared set of values and principles, then truth becomes whatever one decides it should be.”

— Kristen Wevers
CMO, UC Health

Rise of Health Sects



PREDICTION FOUR



Rise of Health Sects

- Politicization of health is not new, but Covid-19 and current environment have accelerated
- Number one indicator of Covid-19 vaccination is political affiliation
- Societal and technology trends are fueling the fire
- How long until we see politically motivated clinics and hospitals?
- Legacy providers are between a rock and a hard place

Prediction Five...



PREDICTION FIVE

*“Healthcare is
to a large extent
a cultural
notion.”*

— Marco Bevolo
International futurist,
designer, lecturer, and
researcher

Disparity Dystopia



PREDICTION FIVE



Disparity Dystopia

- Long history of health inequities and disparities worsened by Covid-19
- **The haves** – the healthy getting healthier
- **The have-nots** – losing even more ground
- **Good news** – legacy providers, payors, and other organizations recognize the clinical and financial benefit of addressing disparities
- **Bad news** – political outlook isn't favorable for largest player – federal government – or society overall

How to leverage these predictions?

- Start a conversation
- Consider the impact on your area of expertise
- Track the progress of the predictions
- Join the online community (coming soon)

To learn more, visit www.JoePublic2030.com



Thank you !