2022 Future of Healthcare The 2022 Future of Healthcare Report illustrates an industry with rising digital innovation expectations

among patients, evolving healthcare delivery models, increasing competition on the healthcare delivery landscape and payer organizations looking to advance digital transformation, drive healthcare affordability and personalized care.

To capture the insights, HIMSS and its Trust Partners — Accenture, The Chartis Group and ZS — asked a range of healthcare stakeholders around the world for their thoughts on their healthcare journeys moving forward. Patients, clinicians, health system and payer organization leaders from the United States, United Kingdom, Germany, Australia and New Zealand participated in the surveys.*

Patient insights

What the research reveals:

US Germany Australia/New Zealand

Here's what they conveyed across the globe:

We surveyed 1,600 patients across 4 global regions

They predict the growth of digital apps that help manage specific conditions or medications

At least **4** in **10** are willing to use remote/virtual monitoring Patients not using apps and healthcare tools today are much less likely to adopt them in the future The exception: Gen Z and Millennials report a higher likelihood of using alternative avenues to manage their health

67%

33% or more growth

in the next 3 to 5 years

63%

62%

Wearable

device

Smart **Fitness** Meditation Food mindfulness apps sleep-tracking watches tracker apps consumption/

68%

72%

calorie tracking Millennials: born 1981-1996; Gen Z: born 1997-2012 Patients see value in emerging technologies and the choices they have for care

They have preferences for convenient patient care US and UK patients are most likely to use retail clinics and online urgent care centers in the next 3 to 5 years

51%

On-demand online urgent care providers 44% 47% 40%

Around 1/2 of patients

from the UK and Germany

More than **1/3** would consider using

nanotechnologies —for example, replacing

traditional colonoscopies with a swallowable pill-sized

camera to relay diagnostic information to providers

Nearly 2/3 of patients from

US, Australia and New Zealand

Retail clinics

On-demand house calls have greater appeal in Germany, Australia and New Zealand AUSTRALIA/ NEW ZEALAND AUSTRALIA/ GERMANY GERMANY 38% *50*% 38% 47% On-demand On-demand online house calls urgent care providers Wherever the care journey takes them, patients of all ages are willing to share their collected health data with providers

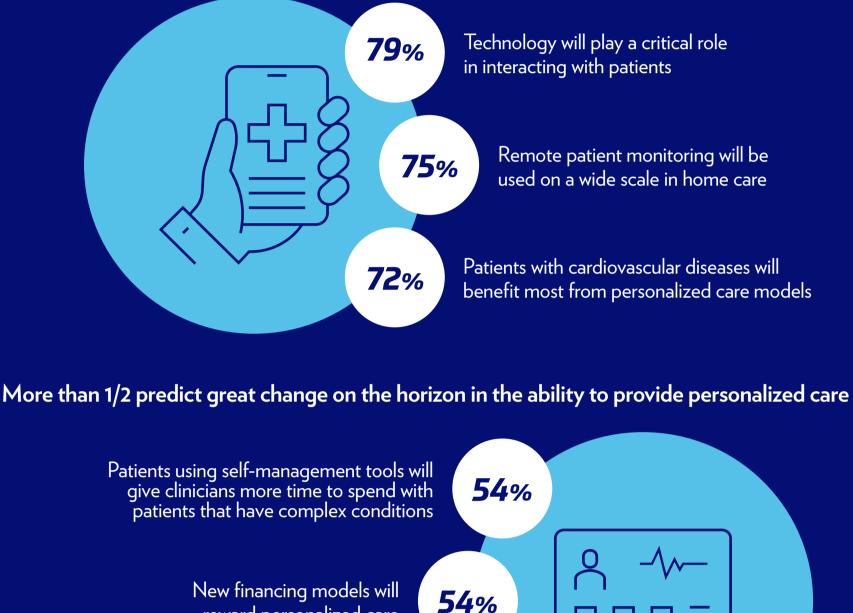
Looking ahead to an ideal world Patients say it's crucial for providers to partner with them to drive personalized care

We surveyed 359 clinicians across 4 global regions

89% will continue using digital health tools to a greater extent by 2026/2027 **76%** believe patients will be

Clinicians report digital health tool use will grow

Clinician insights



52%

Isolation of patients with low digital skills

Discrimination against less tech-savvy clinicians

Remote/virtual monitoring of

patient symptoms or conditions

IMPLEMENTATION STAGE

46%

56%

About **40%** of all US

and global respondents

report high competition with

large technology companies

(Apple, Google, Microsoft, Amazon)

More data breaches

willing to use digital health tools

They agree on the future of technology in driving personalized care models

reward personalized care

They also see risks of healthcare digitalization

Envision positive impact on

clinician job satisfaction

Only 13% see health

organizations transforming into

a fully digital work environment

48%

57%

62%



65%

We surveyed 273 heath system leaders across 4 global regions

Healthcare organizations that fail to move quickly to implement digital transformation

US

Nearly 1 in 2 anticipate being

core clinical and enterprise digital

International

More than 1 in 2 expect to be in

implementation stages in 5 years

in implementation stages for

initiatives in the next 5 years

Wearable technology

64%

Health system leader insights

initiatives will quickly fall behind

PLANNING STAGE

44%

The healthcare delivery marketplace continues to grow which means significant competition

Health systems need a strategy on

how to compete when it comes to

It's not just other hospitals and health systems

Payer organization insights

US

Large health plans

Blues' affiliates

Pharmacy benefits managers

Regional plans

State/local plans

Integrated delivery networks

Mental and

US

37%

Preventive and

transformation goals

US

Improve care coordination 48%

Improve 46%

Improve healthcare affordability 43%

NS

74%

64%

To enhance personalized care ...

Online-only

healthcare services

To drive personalized care ...

HIMSS

69%

behavioral health

56%

About 1/2 of all US and

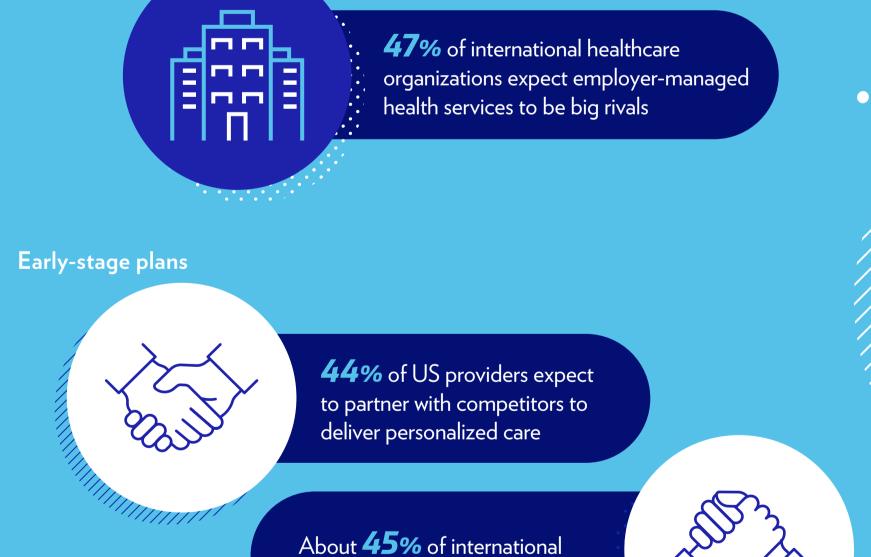
(MDLIVE, Teladoc, Amwell)

global respondents report high

competition for virtual health

digital services and personalized care

Virtual health companies and large technology companies are now major rivals



health systems expect to compete

We surveyed 145 payer organization respondents across 4 global regions

Payers continue to accelerate their digital transformation journey with select focus areas

INTERNATIONAL

Government

Private insurer

Other

US

49%

Chronic/

US

critical illness

55%

INTERNATIONAL

43% Improve care quality

40% personalized patient care

INTERNATIONAL

51%

44%

Community-based

48%

approaches

Deliver more

International

66%



Improving healthcare affordability and personalized care are the top strategic digital

Payers say Big Tech companies will likely drive innovation over the next 5 years and push ...

Digital Transformation

Personalized care

International

Payers will expand leveraging nontraditional approaches and care sites On-demand Mental and behavioral house calls health services ဂိုဂိုဂို Social approach Retail clinics to care

49% **62**% Personalized Reduced Reward Medical Same-day/ advocacy next-day wellness visits and healthcare cards health counseling premiums services appointments

55%

US payers plan to offer increased member incentives in next 5 years

consumer, clinician, health system and payer insights to illustrate how healthcare may transform in the next five years. Download the report to explore the data now. (Link TBD)

*The HIMSS Future of Healthcare research was conducted in November and December 2021. Participants included 1,600 patients, 359 clinicians, 273 health system leaders and 145 payer organization respondents from the United States, United Kingdom, Germany, Australia and New Zealand.

In the 2022 Future of Healthcare Report, HIMSS and its Trust

Partners — Accenture, The Chartis Group and ZS — uncover

accenture