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**2022 Global Health Care Outlook**

Are we finally seeing the long-promised transformation?

[Page 3](#)

**Health consumption in Latin America**

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[Page 5](#)



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# Content



Page 3



Page 5



Page 9

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## 03

### 2022 Global Health Care Outlook

Are we finally seeing the long-promised transformation?

## 09

### The restaurant of the future: an evolving vision

Consumer demand for digital experiences that are also useful and rewarding to them is increasing significantly and has been accelerated, in large part, due to the pandemic.

## 05

### Health consumption in Latin America

Due to the pandemic, people have shown greater awareness of the importance of disease prevention and self-care.

# 2022 Global Health Care Outlook

Are we finally seeing the long-promised transformation?

Is the long-awaited seismic shift in health care finally here? A collision of forces - a global pandemic of historic proportions; exponential advances in medical science; an explosion of digital technologies, data access, and analytics; informed and empowered consumers; and a movement from disease care to prevention and well-being - proving to be the catalyst for the clinical, financial, an operational transformation that health care has long promised to the world.

2022 marks the second full year of the COVID-19 pandemic, and it continues to dominate health systems' attention and resources:

- Global COVID-19 cases have climbed above 270.9 million as of December 14, 2021, and the death toll has exceed 5.31 million.
- Low vaccination rates have hampered many countries' ability to contain the pandemic.
- Recognizing the interconnectedness of our global population, The World Health

Organization (WHO) and other aid groups have appealed to leaders of the world's 20 biggest economies to fund a \$23.4 billion plan to bring COVID-19 vaccines, tests, and drugs to poorer countries in the next 12 months.

- Health care workers are experiencing incredible emotional, physical, and professional stress from responding to COVID-19.
- The pandemic has also decreased access to and consumer demand for non-COVID-19-related medical care.

Despite COVID-19's many devastating impacts, it does present the health care sector with a powerful opportunity to accelerate innovation and reinvent itself. As we have been envisioning the Future of Health and what the ecosystem may look like in 2040, we had anticipated many changes that are occurring today. What we hadn't predicted, was that the global pandemic would be the catalyst to kick start and accelerate those changes so quickly.



COVID-19 has accelerated numerous existing and/or emerging health care trends; among them, shifting consumer preferences and behavior, the integration of life science and health care, rapidly evolving digital health technologies, new talent and care delivery models, and clinical innovation. As sector stakeholders and the consumers they serve face an unfamiliar world of remote working, virtual doctor visits, and a supply chain marked by shortages of medical supplies, personnel, and services, the sector is transforming to meet the new challenges.

Despite continuing challenges on multiple fronts, there is a growing optimism that many nations are now better equipped to manage the impact of COVID-19. While there is little chance that the coronavirus will disappear altogether, if no new, significant variant emerges, experts see COVID-19 transitioning from pandemic to endemic; meaning that will be with us indefinitely but at more predictable, manageable levels.

Health care stakeholders in 2022 should remain alert, nimble, and flexible to deal with ongoing spikes and valleys in endemic COVID-19 cases and deaths and other communicable diseases.

We hope that the legacy of the pandemic is a timely catalyst to initiate and accelerate many of the longstanding challenges and opportunities arising from the six pressing sector issues, and poses questions and suggested actions to transform to the new normal.

## Questions/actions health care leaders should consider for 2022

- Strengthen existing and establish new models of collaboration across professional, institutional, and organizational boundaries.
- Clearly articulate a shared value proposition.
- Align funding and incentives with prevention, health promotion, and wellness.
- Share data across sectors, in real time.
- Center future public health around health equity.

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# Health consumption in Latin America: What is the "diagnosis" for the future?

Due to the pandemic, people have shown greater awareness of the importance of disease prevention and self-care.

In an interview with Alexandro Arias, Leading Partner of the Life Sciences and Health Care industry at Deloitte Spanish Latin America.

Frequent medical consultations, nutritional counseling, physical training and psychological care, among other health and wellness activities that were previously not so popular among Latin Americans, are today becoming essential services within our region.

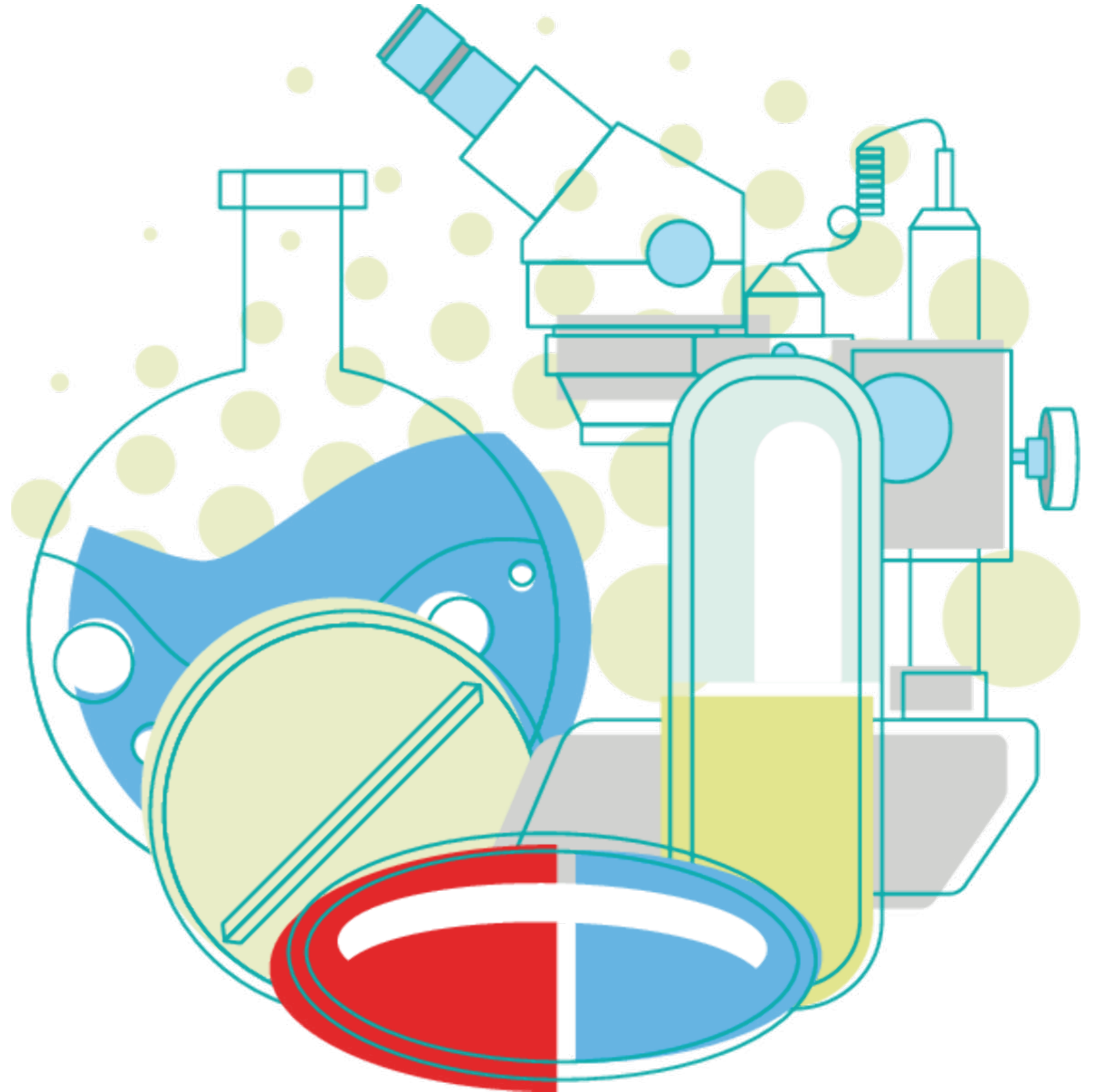
In Mexico alone, according to the most recent edition of the Deloitte Consumer Dashboard, 66% of those surveyed are prioritizing their well-being more and 45% are promoting changes in their personal care.

But, why are these habits growing and how could they modify, in the future, the trends of the health market in Mexico and Latin America?

## Compared to the status prior to the pandemic, what condition is the health industry in our region in today?

Our region, in general, had to face the challenge that many people were not insured when COVID-19 infections increased in their communities. Some of them, unfortunately, were very affected by the disease and even had to be hospitalized, which involved a large expense out of their own pocket to pay for the treatments.

Also, during the pandemic, countries with universal health coverage systems (for



example, Argentina and Colombia) faced financial challenges, due to the lack of infrastructure and capacity in their hospitals and health centers to receive and treat to more patients.

But, in summary and as a result of health strategies, today we can divide the conditions of the health sector in Latin America into two groups of countries: the first, made up of Uruguay and Costa Rica, is experiencing a highly developed "new normality", thanks to the size of its population, of its health infrastructure since a large percentage of its inhabitants have their complete vaccination schedule; and the second, made up of the rest of the nations, which has responded to the pandemic, but not as quickly as the first.

**What factors are driving people to take better care of their health and well-being in Latin America?**

The pandemic and its effects allowed consumers in Latin America to realize the importance of having health insurance. In Mexico, according to figures from the Mexican Association of Insurance Institutions (AMIS), only 1.2% of the population is insured for cases of COVID-19, but, due to the high costs of medical treatments against coronavirus, more people are evaluating the possibility of purchasing insurance, at the same time that insurers seek to offer more accessible products.

In addition, by having less social contact and suffering from the loss of loved ones,

among other factors, the population of the region today is facing mental health challenges, which it seeks to address through initiatives established by companies and governments about it.

**What consumption habits have been transformed in the health industry?**

Currently, people no longer like to go and stay in a doctor's office for a long time, because the doctor's waiting room represents a point of exposure to the spread of COVID-19, and because it implies leaving comfort home to travel to the clinic or health center. This has motivated a growth of electronic commerce in health, as well as telemedicine modalities.

However, this presents a challenge. Which one? That, in our region, there is a lot of poverty and inequity, which means that not all individuals have the technology or the infrastructure to access these remote health solutions. Therefore, it may be necessary for the sector to offer other kinds of alternatives, such as the physical approach of its products and services to patients (as occurs, for example, with the vehicles that provide medical services in communities that need it).

**Speaking of health products and services in general, what strategies are companies in the sector adopting to boost their sales?**

In the case of pharmaceutical companies, since the launch of their vaccines against COVID-19, they are facing a challenge of trust and another of security: trust, because the vaccine was developed in a short time and many people fear the effects side effects that may occur; of security, for guaranteeing the population that its products will be a solution in the short, medium and long term.

Given this context, these companies, with the support of the World Health Organization (WHO), as well as the Pan American Health Organization (PAHO), have developed communication strategies to insist on the demonstrated efficacy of the doses, as well as how to publicize scientific research that, soon, they will make it possible to solve some of humanity's pending health challenges.

Hospitals, for their part, have been reconfigured to treat COVID-19 patients, while caring for other patients, establishing protocols to prevent the spread of the coronavirus. They have even created solutions outpatients that allow people not to stay long in their facilities; and they have changed their diagnostic models, moving medical personnel to offices, social events and remote communities, to examine and care for people.

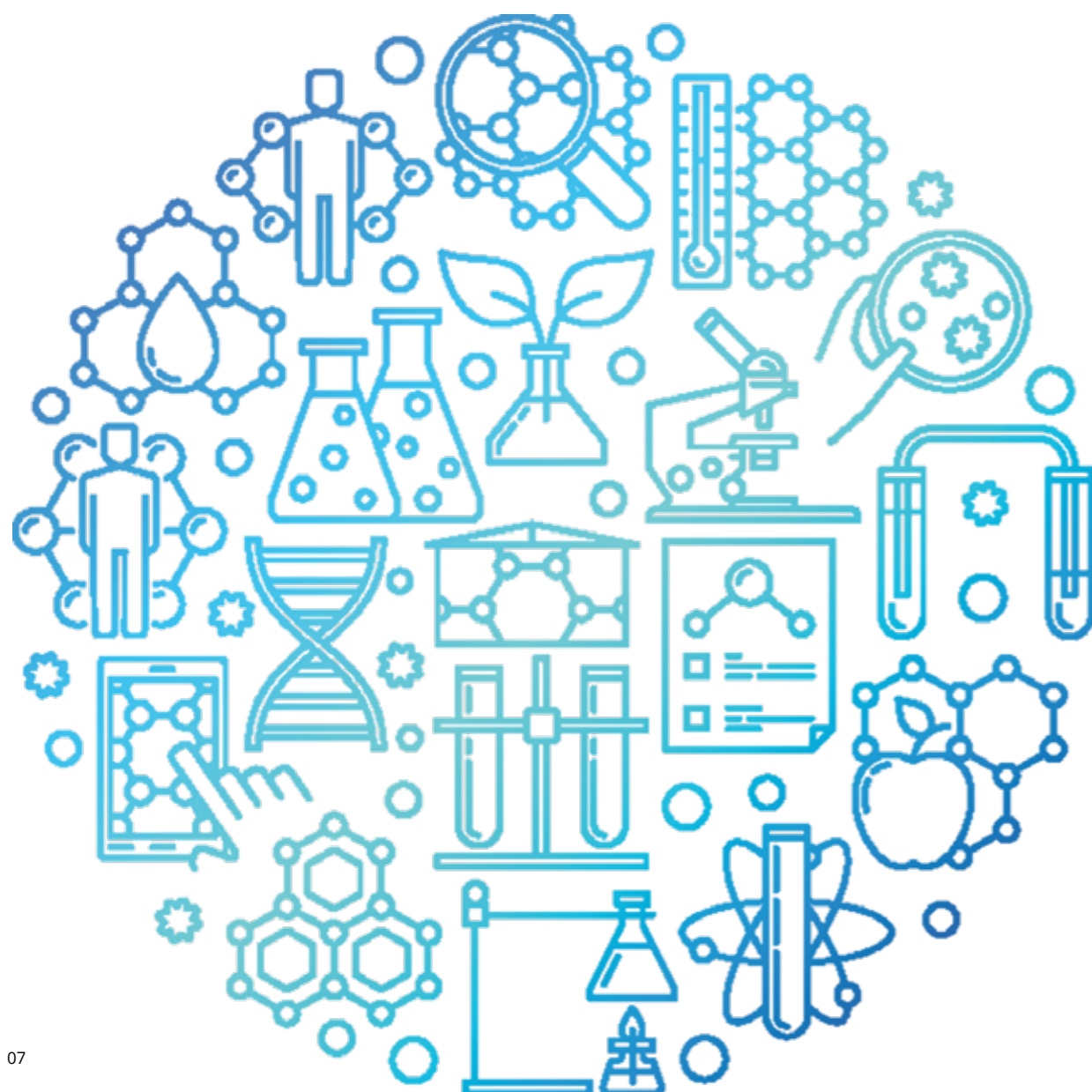
In the case of medical offices adjacent to pharmacies, patients who require primary care are being recruited and represent a point of attraction for consumers and a boost for sales in the sector; that is to say, in these places not only prescriptions are issued by doctors, but diagnostic and imaging services are already offered, a trend that will continue in the coming months.

Likewise, health centers are developing new models of remote care. Although, months ago, consultations were exclusively face-to-face, now they can be remote, through specific medical and technological devices, in order to offer solutions to patients. ●

**Will he prevail? increase in consumption of health products and services, even after the pandemic? How could companies in the sector prepare for the future?**

In Latin America, society has been gradually transformed in recent months, and now it does not react, but rather prevents physical and mental discomfort. For this reason, it will be extremely important that the participants in the region's health sector, including companies, analyze these new habits, in order to provide the best solutions to the new challenges that lie ahead.

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The pandemic and its effects allowed consumers in Latin America to realize the importance of having health insurance.

# The restaurant of the future: an evolving vision

Consumer demand for digital experiences that are also useful and rewarding to them is increasing significantly and has been accelerated, in large part, due to the pandemic. How can restaurants improve customer experiences to achieve success with next generation diners?



In our report The Restaurant of the Future: An Evolving Vision, we provide valuable insights into three trends that are shaping diners' consumption patterns, and examine actions restaurants can take to thrive in the future.

## Three trends that are shaping the restaurant of the future

The restaurant industry is grappling with questions that used to be certainties. What does a modern ordering experience look like? What does it mean to operate a restaurant in 2021? What counts as a restaurant? By the end of 2019, the answers to those questions were already changing. Since then, many factors have accelerated the transformation of the restaurant industry, and the changes are not always obvious.

Similar to the trends that emerged at the start of the pandemic, there are three main factors influencing restaurants: convenience, digital, and security. These catalysts overlap and influence each other to a great extent; however, together, they point to a single, global mandate for brands to restaurants fundamentally change their business models.

In our 2020 study, convenience was clearly the most active frontier. Security was an unquestionable imperative - a reaction, not yet a strategy - and digital was quickly adapting to those needs, as part of an evolutionary journey that was already underway. Restaurants are fundamentally changing their business models.



Now, it seems that convenience has continued its rapid maturation and has taken its place as a permanent fixture in the restaurant landscape; digital continues to play an increasingly important and central role, due to its nature; and the most active front today, security - where the measures implemented were a reaction to the pandemic - is giving way to more consistent and lasting approaches.

In that sense, and taking these facts into consideration, where is the restaurant industry headed? Deloitte surveyed 1,000 consumers who dined at a restaurant in the past three months to take a fresh look at their attitudes and perspectives.

## To meet the demands, meet the demands

Security, convenience, digital. These aren't the only forces shaping the restaurant industry today, though repeated studies find they are the vectors of most dramatic change. The trend line for progress in each of the identified areas is bumpy as pandemic-related pressures continue to ebb and flow on top of longer-term imperatives. The one constant is change and the importance for restaurants to adapt to ever-dynamic customer demands.

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