# **Deloitte.**Insights

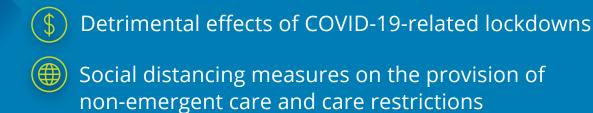
### 2021 global health care outlook Laying a foundation for the future



Causes of this slow down:

Global health care spending is expected to

slow down by **2.6%** in 2020.



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Long term outlook - Health care spending is expected to rise at a CAGR of **4%** over 2020–24, up from **2.8%** in 2015–19.

Global health care spending as a share of GDP will likely remain

at around 10.3% through 2023, slightly ahead of 2019's ratio. Spending will continue to be unevenly spread, ranging from US\$12,703 in the United States to just US\$37 in Pakistan in 2024.

Factors expected to impact higher health care spending:





Clinical and technology advances



The expansion of public and Labor population health care systems costs

Top issues Consumers and the human experience

Among individuals who track their

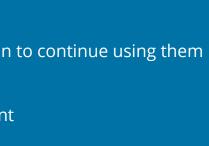
their behavior at least moderately

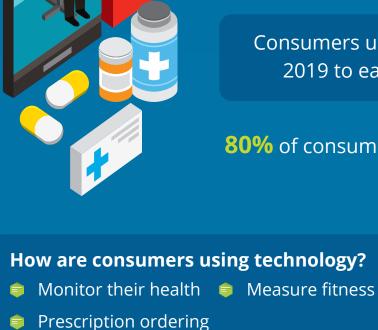
health, more than **75%** say it changes

#### Consumers are helping to accelerate the pace of change in health care in parts of the world:

Showing greater activity and engagement

#### Using virtual visits more than ever before and plan to continue using them Using technology for health monitoring A trusted clinician relationship remains paramount





Consumers using virtual visits rose from **15%** to **19%** from 2019 to early 2020; this jumped to **28%** in April 2020.

> 80% of consumers say they are likely to have another virtual visit, even post COVID-19.

Organizations will need strategies to build trust to make consumers feel comfortable sharing their personal health data.

#### Site of service and care transformation Ubiquitous adoption of virtual care Workforce reimagined

New partnerships and markets

Emerging disruptors

Health equity

Care model innovation

The health care delivery landscape and the behaviors

of consumers it serves is pivoting dramatically:

Care models are shifting to focus more on the patient/consumer

**Community** (places of worship, gyms,

markets, banks, shelters, food pantries, etc.)



Wellness

in partnership with providers on care and health goals

**75%** of consumers want to work

**Consumers and providers support** 

a transition to new care models

72% of consumers prioritize their personal health and wellbeing

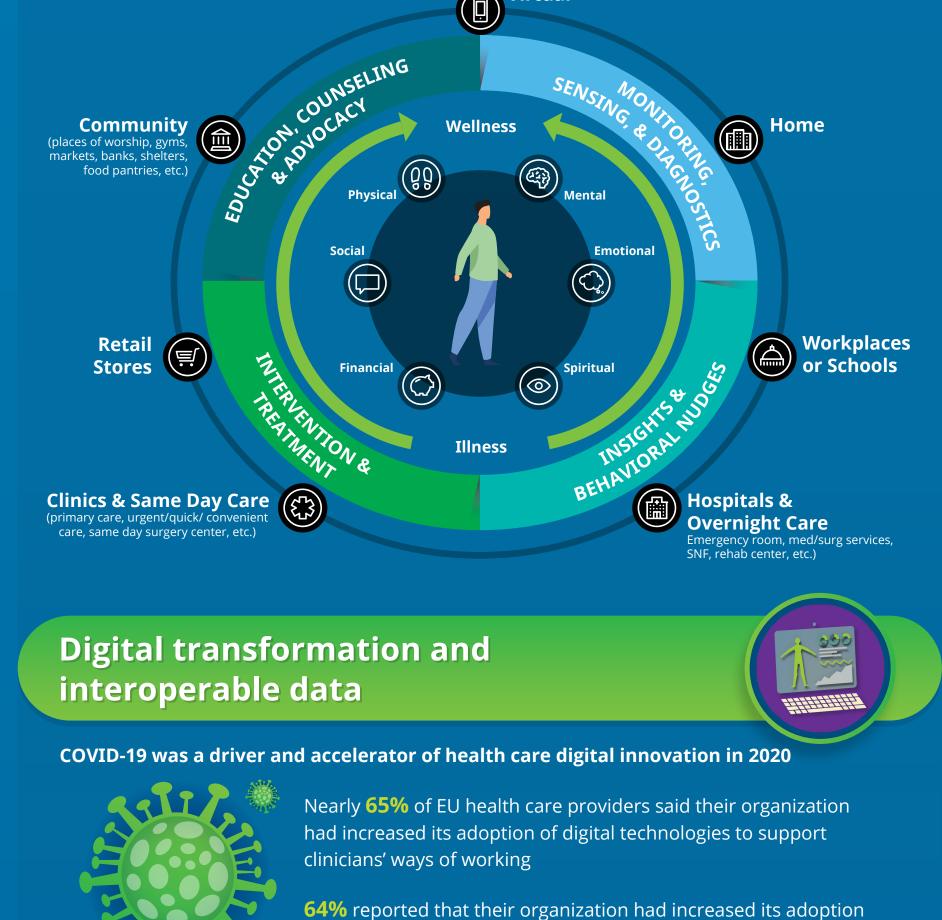
physicians are prioritizing a shift

to prevention and wellbeing

and supporting technologies:

needs and goals; 60% of

SENSING & DIA Home



#### COVID-19 has helped break down regulatory, financial, and behavioral barriers to allow virtual care to be widely integrated into our health care system and meet patients' needs Radical data interoperability is a required foundational

capability to enable the deliver of patient-facing programs

delivery, reduce the cost of care, increase revenue and growth

It can reduce admin costs, increase efficiency of care

front-burner issue for cloud providers

and their customers.

Some studies say that up to 80% of health outcomes are

COVID-19 has thrust health equity into the spotlight and is magnifying the profound impact that systemic racism

What can health care stakeholders do to make

Virtual health

and associated technologies

Health care organizations today are transitioning to health IT systems powered by cloud computing and data/analytics tools, driven by cost controls Cloud spending increased by 11% in the second quarter

**Artificial Intelligence** is gaining traction in health care. Early use centered on automating manual processes; however, the pandemic has opened doors for Al and other digital technologies to solve complex clinical and non-clinical problems

engaging with patients

of 2020 over the same period the previous year **Cloud is helping:** producing a scalable virtual desktop enabling remote care and remote work **Biggest concerns? Cybersecurity** will continue to be a Find new ways of working to remove

Industry stakeholders face considerable challenges in addressing

the large scope of the behavioral health crisis, among them:

Inadequate, inaccessible, and unaffordable care systems

Infrastructure

Gaps in clinical and scientific knowledge

Siloed health care data management

Stigma and drivers of health

development bottlenecks and get new releases out **faster** 

of digital technologies to provide virtual support and ways of

affected by social, economic, and environmental factors. Drivers of health (also known as social determinants of health) include physical environment, food, infrastructure, economy, wealth, employment, education, social connections, and safety.

health more equitable?

empath<sub>V</sub>

can have on health and wellbeing.

**Health equity** 

**Health equity framework** - Physical Environment

Environmental — Food

sustain Well Bei athy People, Comme **Economy** EQUITY **Economic** -Wealth & Planet Receive care **Employment** 

Structures Social The mental wellbeing and behavioral health imperative Approximately 10% of the world's population is affected by mental health issues, making it a leading cause of ill health and disability. • Globally, it is estimated **264 million** people suffer from depression. Dementia affects upwards to 50 million people globally.

**Transportation & Mobility Economic Growth** Job Opportunities **Basic Needs** Wealth Accumulation Secure Employment **Employment Benefits** Meaningful Work Health, Digital, & Financial Literacy **Educational Opportunities** Support System Community Relationships **Public Safety Personal Safety** 

Climate Change

Neighborhoods

**Food Access** 

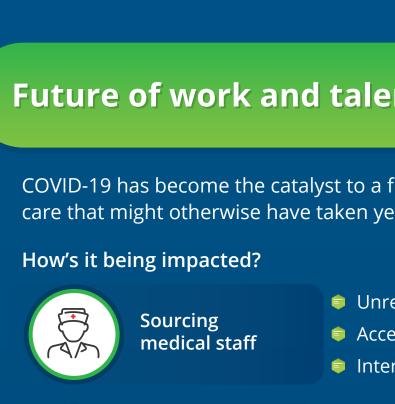
**Food Security** 

Housing

**Environmental Health** 

**Internet Connectivity** 

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Different teaming strategies Diversity of identity gives a team the ability to tap into different viewpoints and experiences

## Diversity and inclusion

Learn more at www.deloitte.com/healthcareoutlook **About Deloitte** 

International staff Adapting to the virtual workplace Increased use of technology **Reskilling and** upskilling New technology dynamics/'webside' manner Require specialist education and training in genomics, **Blending** AI/ML, and natural language processing (NLP); enhanced human-technology diagnostic, data analysis, and critical judgement skills; and capabilities proficiency in interpreting reports and risk scores.

Collaboration Renewed focus on collaboration during the pandemic to: Drive clinical innovation Trust levels Resource sharing Types of collaborations: Data platforms and analytics Disruptive entrants Public/private partnerships Health systems as platforms. Collaboration was never more evident than during the pandemic in addressing supply

chain challenges related to COVID-19. Providers are likely to continue to struggle with supply chain issues in 2021 as COVID-19 outbreaks possibly surge, recede, and surge again. Collaboration will be key in order to meet their needs.

About Life Sciences and Health Care at Deloitte Touche Tohmatsu Limited

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Future of work and talent COVID-19 has become the catalyst to a future of work and talent in health care that might otherwise have taken years to attain. Unretiring medical staff Accelerating medical trainees Accommodate patient needs for virtual and telehealth Identifying future skills needs and training requirements

Imperative to promote workplace diversity and inclusion

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