

Digital Health Technology Vision 2016

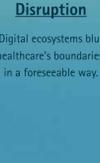
# Top 5

## Digital Health Trends Show the Power of People

High performance. Delivered.

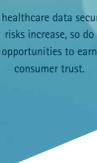
Keeping up with changing technology is vital, but it's just as important to evolve the consumer experience, care delivery methods and career development opportunities for the healthcare workforce.

The Digital Health Technology Vision 2016 reveals five trends that prove winning in the digital age hinges on people.



### 1. Intelligent Automation

Do things differently, do different things and create new jobs, products and services in healthcare.



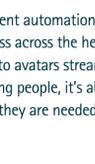
### 2. The Liquid Workforce

Today's digital demands call for highly agile healthcare skillsets.



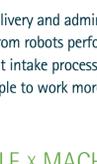
### 3. Platform Economy

Ecosystems are the new bedrock of digital healthcare.



### 4. Predictable Disruption

Digital ecosystems blur healthcare's boundaries, in a foreseeable way.



### 5. Digital Trust

As healthcare data security risks increase, so do opportunities to earn consumer trust.

## 1. Intelligent Automation: Do things differently, do different things and create new jobs, products and services in healthcare.

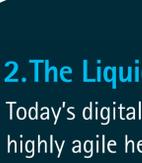
Intelligent automation is making care delivery and administration more seamless across the health ecosystem. From robots performing housekeeping duties to avatars streamlining the patient intake process—it's not about replacing people, it's about allowing people to work more efficiently, and where they are needed most.



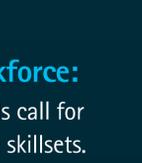
Data can help clinicians make informed decisions through computer-assisted algorithms, and it can get the right supply to the right place at the right time.

Health plans can use data to help guide consumers in making a decision about the best plan for them.

Apps can deliver turn-by-turn directions to a clinic, from your door to the visit room.



of healthcare executives report extensive use of automation for IT tasks and 47% for customer interactions.



of healthcare executives report more investments in embedded artificial intelligence (AI) and 69% in machine learning.



per encounter can be saved by each US primary care physician applying virtual health to annual ambulatory patient encounters.

## Taking charge of mental health

SilverCloud provides an online solution for the treatment of mental and behavioral health. Its programs allow users to access interactive content anonymously, and at a pace that suits their schedule. Such flexibility allows the patient to engage in and take charge of their own care and provides clinicians with the ability to facilitate up to six times or more patients than pure face-to-face work, while maintaining the same level of outcomes. The solution uses analytics and clinical measurements to report back on progress.



## 2. The Liquid Workforce: Today's digital demands call for highly agile healthcare skillsets.

Digital has generated a more fluid workforce that can go where help is needed. Have a sick child? Digital services can allow you to Skype with a pediatrician. Struggling with a high-risk pregnancy issue? Through virtual technology, a specialist in New York can treat an ailing patient in New Mexico.



This emergent fluidity requires some fundamental shifts in how the enterprise is structured, how people are trained and how the culture adapts to new technology-enabled ways of working. But these changes come with benefits.

Organizations can launch innovations faster. Health plans can use crowdsourcing to hear from innovators and entrepreneurs. And, virtual care provides greater accessibility and flexibility for patients.



of healthcare respondents believe a more fluid workforce will improve (vs. derail) innovation.



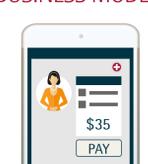
saved annually with a care model that includes an annual physician exam and technology-enabled self-management the rest of the year.



of the healthcare workforce will comprise contractors/freelancers or internal temporary positions in three years, according to estimates.

## An innovation engine

UnitedHealth Group's Garage program aims to identify, nurture and accelerate innovative internal business ideas that lead to new health businesses, products and services. The Garage focuses on a small, discrete portfolio of seed-stage ideas, putting them through a disciplined process designed to validate and test business concepts and provide paths to commercialization. Dedicated "entrepreneurs in residence" are matched to ideas based on their own knowledge, talent and passion.



## 3. Platform Economy: Ecosystems are the new bedrock of digital healthcare.

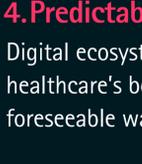
Platforms are enabling smart cities, connected machines, robust customer analytics and more. In healthcare, they provide the underlying technology that can make healthcare experiences more connected. Platforms can link the entire healthcare ecosystem—from patients to health plans.



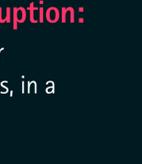
Imagine a future when healthcare consumers will go to one central place to book an appointment, check their electronic medical records or pay an out-of-pocket expense.

Health plans will connect with consumers through engagement platforms, collecting data from wearables and offering rewards or premium discounts for progress.

Providers will track a patient's activity from hospital to home.



of healthcare executives believe adopting a platform-based business model and engaging in ecosystems of digital partners are very critical to the success of their business.



is the expected growth for health application-programming interfaces (APIs) in five years.



of healthcare providers due to poor customer experience. This switching translates to a loss of more than \$100 million in annual revenue per hospital.

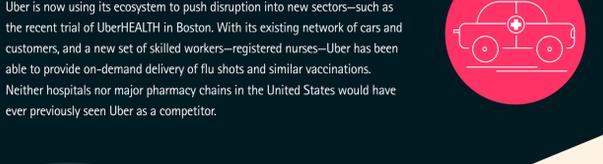
## Platform potential

Philips Health is placing a big strategic technology bet on a platform business model by launching the Philips HealthSuite platform with three different cloud partners: Salesforce.com, Amazon AWS IoT, and Alibaba Cloud. Philips has a bold vision: to reinvent healthcare. With its three cloud partners, it will be able to rapidly scale up to hundreds of millions of patients, devices, and sensors – using endless flows of data to tackle the biggest challenges facing the industry, from the hospital to the home.



## 4. Predictable Disruption: Digital ecosystems blur healthcare's boundaries, in a foreseeable way.

In today's digital economy, disruption is ubiquitous. It's changing the way we consume everything—from products to entertainment. As consumers increasingly want personalized, on-demand services, healthcare is not immune. Lines are blurring across industries and new ecosystems are emerging. Startups, wearables and device manufacturers are converging to capture what is happening with consumers, and react in real time.



Disruption can be a game changer if a business can predict it.

If the banking industry has mastered mobile payments, health plans should explore mobile apps that can make out-of-pocket payments pain-free for consumers.

Healthcare organizations must link up with those outside of the industry to seize new disruptive opportunities.

If companies like Spotify can successfully deliver music as a service, healthcare providers should also look at how care can be delivered as a service.



of healthcare executives agree that data ethics breaches pose similar risks to business as security breaches.



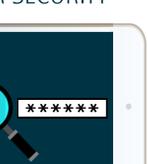
industries that healthcare executives believe will face the most digital disruption within the next three years: healthcare, banking and biotechnology.



of healthcare consumers wear or are willing to wear technology to track their lifestyle and/or vital signs.

## Drive-up healthcare

Uber is now using its ecosystem to push disruption into new sectors—such as the recent trial of UberHEALTH in Boston. With its existing network of cars and customers, and a new set of skilled workers—registered nurses—Uber has been able to provide on-demand delivery of flu shots and similar vaccinations. Neither hospitals nor major pharmacy chains in the United States would have ever previously seen Uber as a competitor.



## 5. Digital Trust: As healthcare data security risks increase, so do opportunities to earn consumer trust.

Protecting privacy has become table stakes in healthcare. Now, organizations must figure out how to responsibly and ethically manage a mass of customer data that is increasing in volume by the minute. If handled properly, this treasure trove of data can be a tool for creating tailored services and building consumer trust.



Ecosystems are expanding the number of potential weak links in the digital chain. Exposure must continue to increase, so ongoing steps must be taken to protect privacy and security of data and build digital trust.

Solid policies and procedures must be in place for governing the ecosystem.

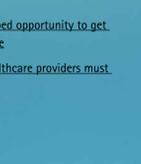
Furthermore, those policies must be disclosed and understood to ensure the right consent and access to information.



of healthcare executives agree that data ethics breaches pose similar risks to business as security breaches.



of healthcare executives report there is a strong or very strong demand for increased ethical controls of data among their knowledge workers.



of consumers globally believe that the benefits of being able to access medical information electronically outweighs the risk of privacy invasion.

## Trusted territory

After the consumer outcry from its iCloud breach in 2014, Apple came to understand afresh the importance of trust. Its efforts to be transparent in how it uses and secures customer data is testimony to the value this leading brand places on trust. Its new platforms, such as Apple Pay and HealthKit, are clear beneficiaries of this trusted-by-design approach because the strong security and ethics that are "baked in" give customers confidence that their digital footprints are secure and private, easing the transition to and adoption of the Apple ecosystem.



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Losing patience: Why healthcare providers must up their mobile game

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