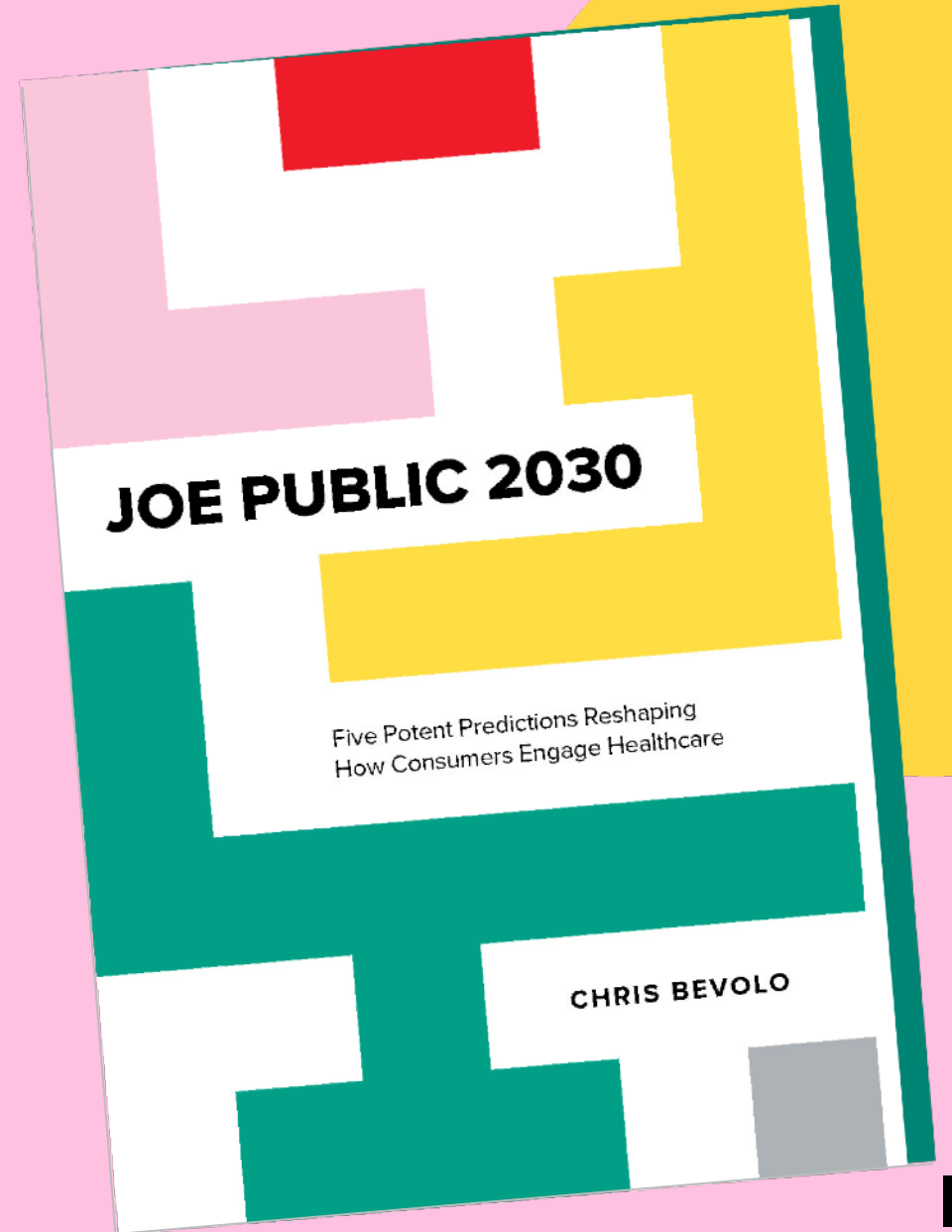


Joe Public 2030

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

- 10-year anniversary of *Joe Public Doesn't Care About Your Hospital*
- 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



PREDICTION PROCESS

Three months of exploration

- “Team 2030” - dozen top thinkers acting as futurists
- Research deep dive
- More than 260 resource citations
- Industry interviews
- Followed process from *Non-Obvious Megatrends* (Rohit Bhargava)

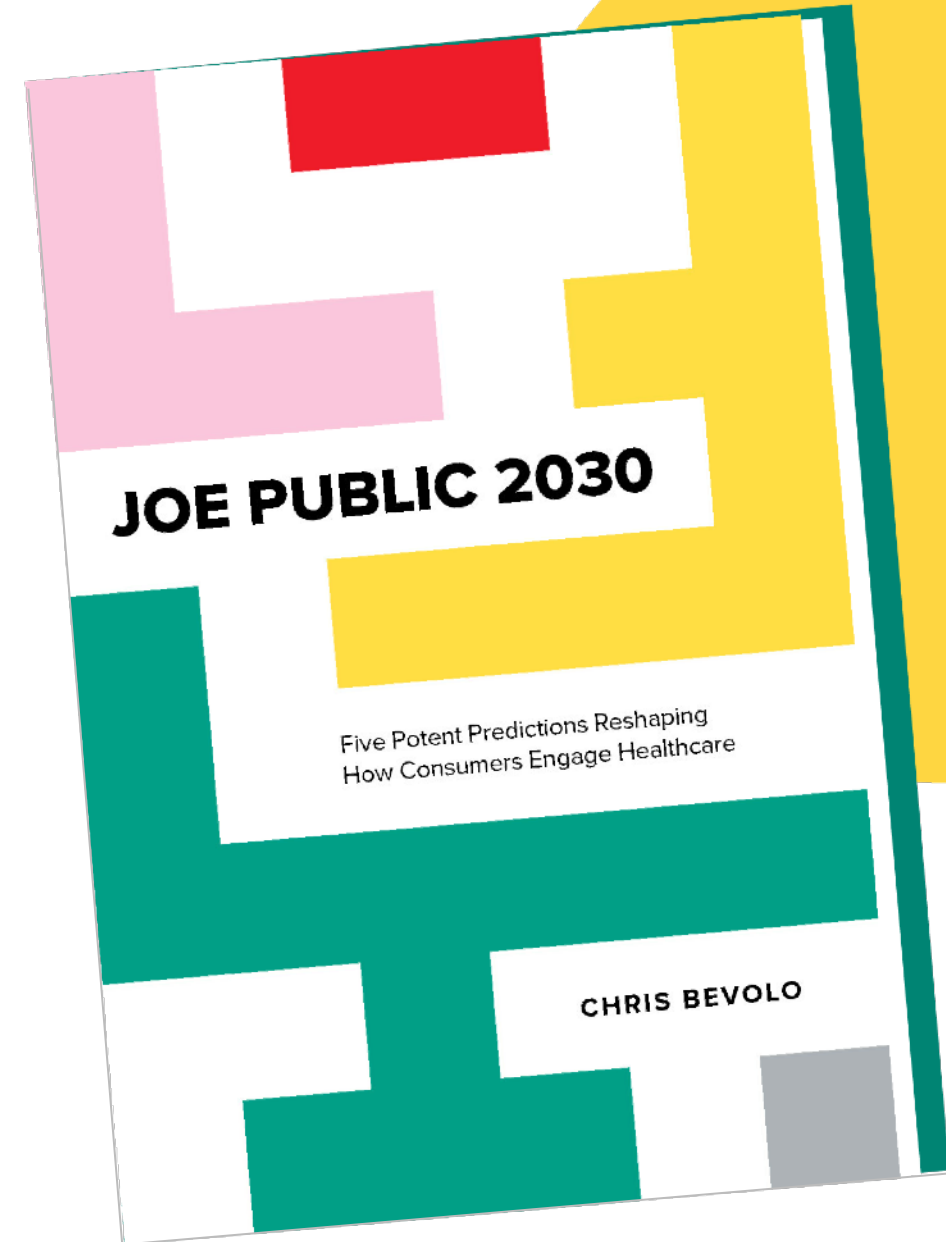
Industry input

Bon Secours Mercy Health
Cincinnati Children's
Cleveland Clinic
Duke Health
Geisinger
Henry Ford Healthcare
Intermountain Healthcare
Johns Hopkins Medicine
Mayo Clinic

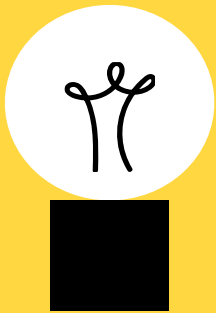
Bain Capital
Bright Health
CVS Health
DXTRA
Optum
Sesame Health

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
- In each case, these predictions are already happening to a degree



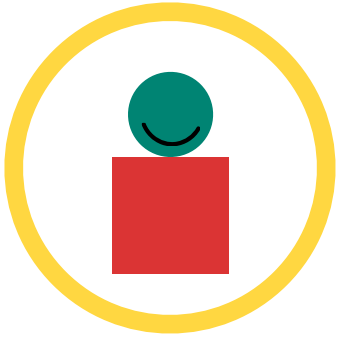
The Five Predictions



1. The Copernican Consumer
2. Constricted Consumerism
3. The Funnel Wars
4. The Rise of Health Sects
5. Disparity Dystopia

Prediction One...

PREDICTION ONE



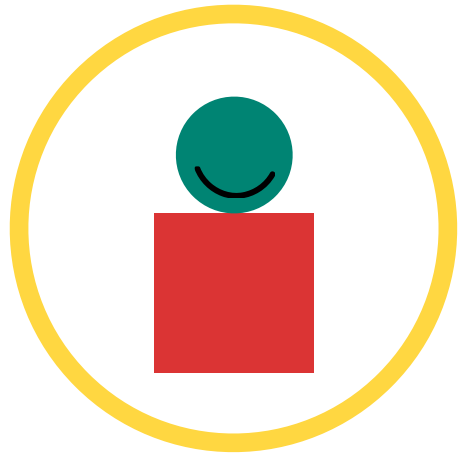
AI
Blockchain
Wearables
Monitors
Digital therapeutics
Precision medicine
Home health
Retail health
Virtual health
Self-service
Role of physicians

The Copernican Consumer

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

– Dr. Ryu, CEO, Geisinger

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



Employers
Private payors
Public payor
Vertical integration
Narrow networks
Tiering
Steering
Consolidation
Choice

Constricted Consumerism

“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

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

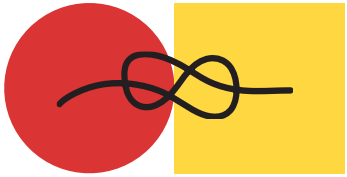
Consumers will be further funneled and restricted by providers

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

Prediction Three...



PREDICTION THREE



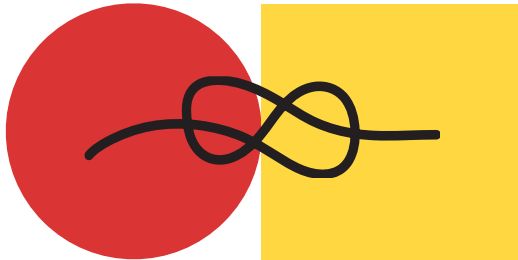
Top of the funnel
New entrants
Tech giants
Retail giants
Payors as providers
VC/PE money
Local/national scale
Integrated systems
Innovator's dilemma

The Funnel Wars

“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

PREDICTION THREE



The Funnel Wars

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

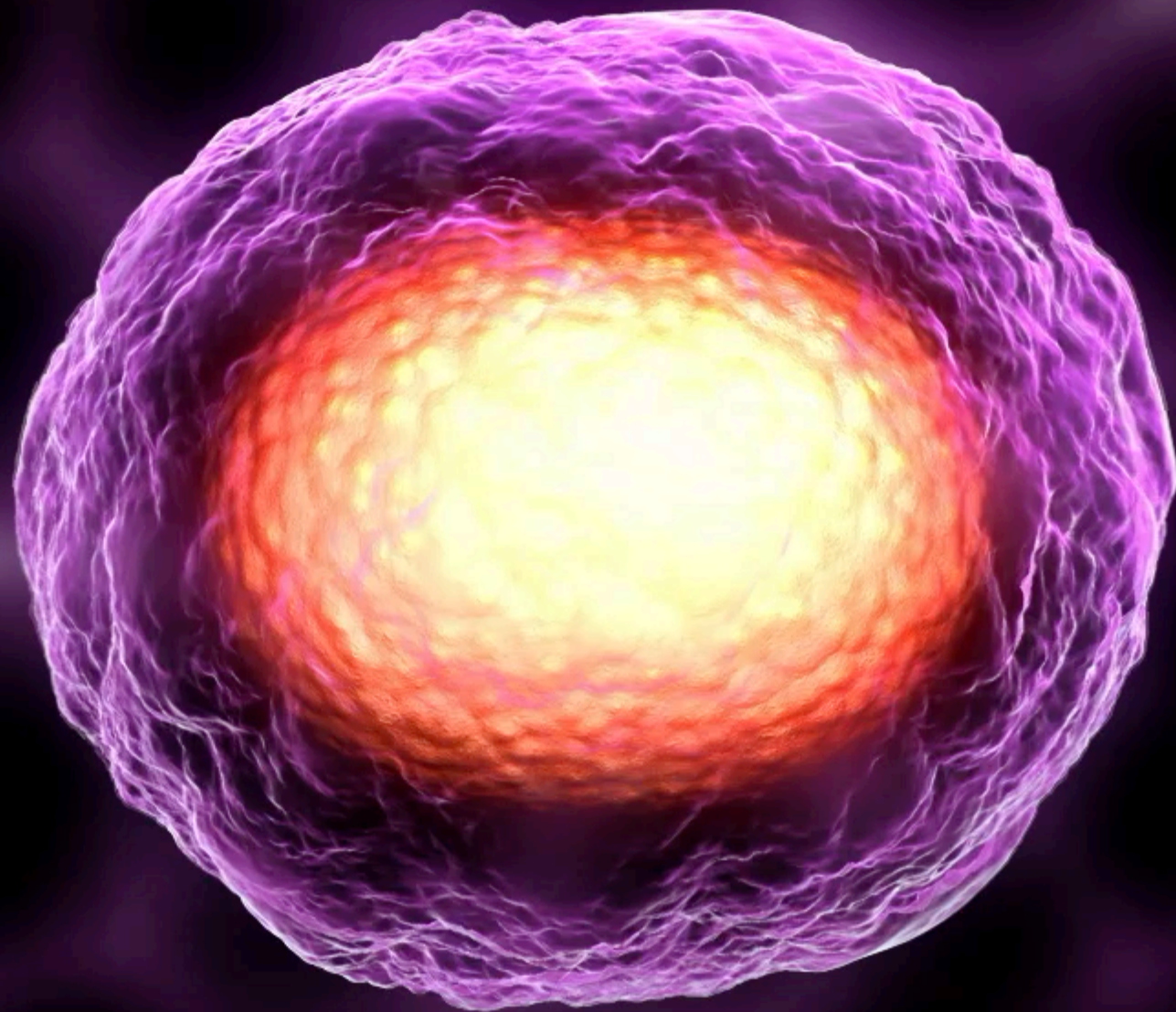
Billions in VC/PE money pouring into space

Payors now direct competitors

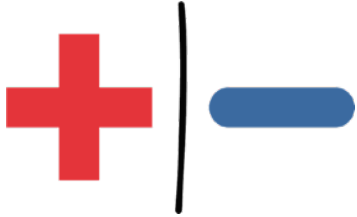
Other than few large integrated systems, many legacy providers face losing patient relationship and becoming "downstream vendors" of care – this will be a market-to-market battle

New entrants have the upper hand – culture vs. knowledge

Prediction Four...



PREDICTION FOUR



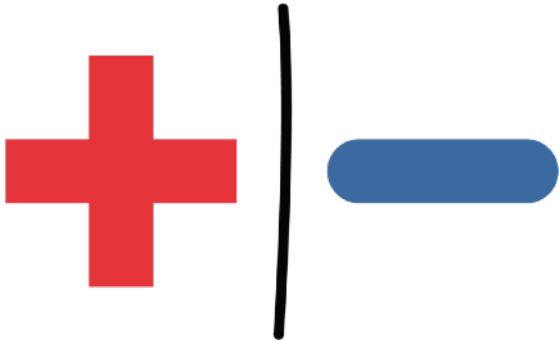
Politicalization
Tribalism
Social media
Personal data
Distrust of experts
Anti-science
Influencers
Individualism
Consumerism
CSR

Rise of Health Sects

“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

PREDICTION FOUR



Rise of Health Sects

Politicization of health is not new, but Covid-19 and current environment have accelerated

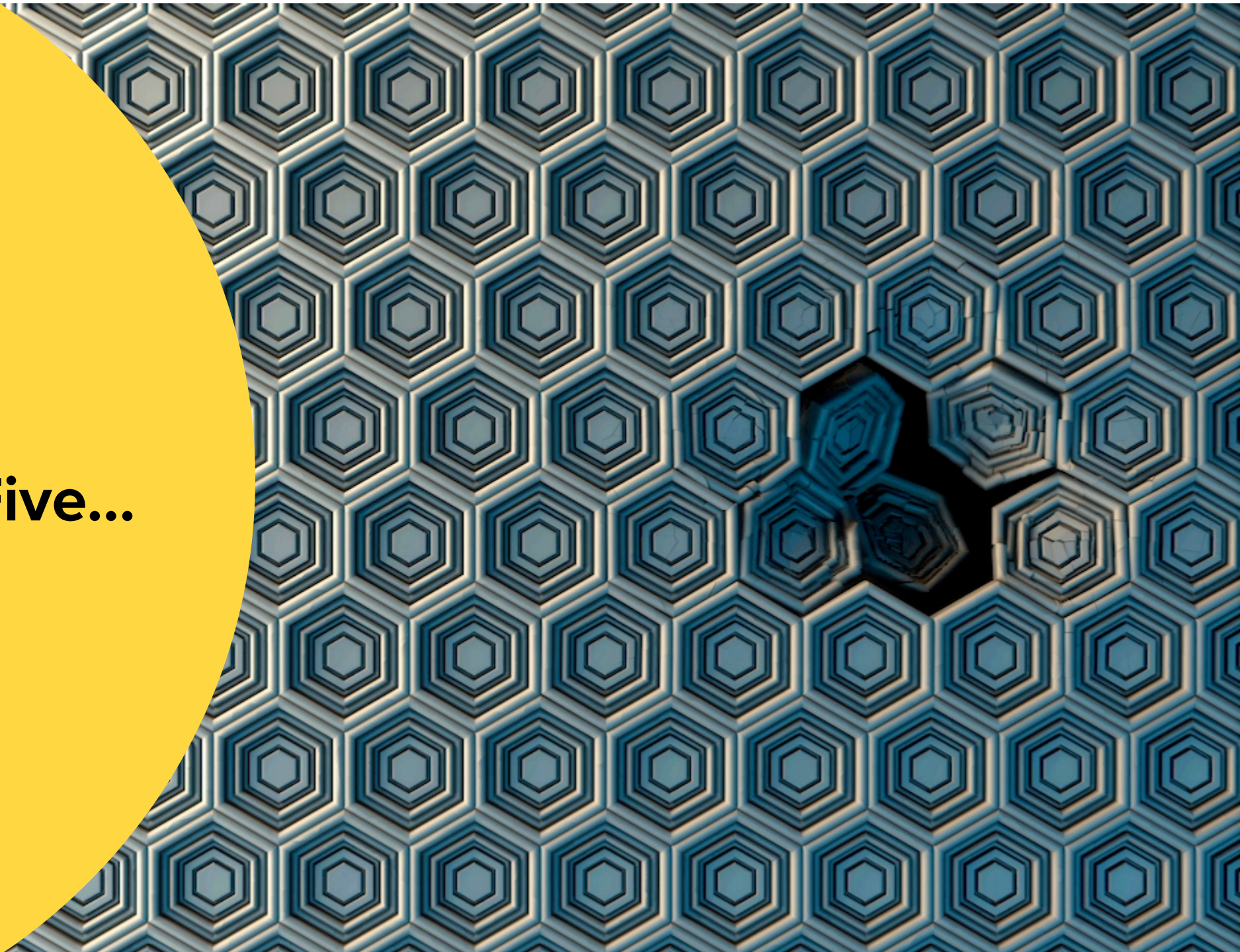
Number one indicator of Covid-19 vaccination is political affiliation

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



Haves v. Have Nots

Historical gap

Covid-19 impact

Aging of America

Affordability

Technology gap

Climate change

Culture

Disparity Dystopia

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

— Marco Bevolo

International futurist, designer, lecturer, and researcher

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 !