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.*

What the research reveals:

Patient insights
We surveyed 1,600 patients across 4 global regions

US | UK | Germany | Australia/New Zealand

Here's what they conveyed across the globe:

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

33% or more growth in the next 3 to 5 years

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

72%	68%	67%	63%	62%
Smart watches	Fitness tracker apps	Meditation mindfulness apps	Food consumption/ calorie tracking	Wearable sleep-tracking device

Millennials: born 1981-1996; Gen Z: born 1997-2012

Patients see value in emerging technologies and the choices they have for care

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

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**

Retail clinics: US **51%**, UK **47%**

On-demand online urgent care providers: US **44%**, UK **40%**

On-demand house calls have greater appeal in Germany, Australia and New Zealand

On-demand house calls: Germany **50%**, Australia/New Zealand **38%**

On-demand online urgent care providers: Germany **47%**, Australia/New Zealand **38%**

Wherever the care journey takes them, patients of all ages are willing to share their collected health data with providers

Nearly **2/3** of patients from US, Australia and New Zealand

Around **1/2** of patients from the UK and Germany

Looking ahead to an ideal world

Patients say it's crucial for providers to partner with them to drive personalized care

Clinician insights
We surveyed 359 clinicians across 4 global regions

Clinicians report digital health tool use will grow

89% will continue using digital health tools to a greater extent by 2026/2027

76% believe patients will be willing to use digital health tools

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

- **79%** Technology will play a critical role in interacting with patients
- **75%** Remote patient monitoring will be used on a wide scale in home care
- **72%** Patients with cardiovascular diseases will benefit most from personalized care models

More than 1/2 predict great change on the horizon in the ability to provide personalized care

- Patients using self-management tools will give clinicians more time to spend with patients that have complex conditions **54%**
- New financing models will reward personalized care **54%**
- Envision positive impact on clinician job satisfaction **52%**

They also see risks of healthcare digitalization

- **62%** Isolation of patients with low digital skills
- **57%** More data breaches
- **48%** Discrimination against less tech-savvy clinicians

Only **13%** see health organizations transforming into a fully digital work environment

But **7 in 10** believe their healthcare organizations plan to use virtual health

Clinicians globally believe online medical records will be the top in-demand digital health tool in the future

- **74%** Online medical records
- **68%** Mobile phone/tablet applications
- **65%** Remote/virtual consultations with a healthcare professional
- **65%** Remote/virtual monitoring of patient symptoms or conditions
- **64%** Wearable technology

Health system leader insights
We surveyed 273 heath system leaders across 4 global regions

Healthcare organizations that fail to move quickly to implement digital transformation initiatives will quickly fall behind

PLANNING STAGE		IMPLEMENTATION STAGE
54%	US Nearly **1 in 2** anticipate being in implementation stages for core clinical and enterprise digital initiatives in the next 5 years	46%
44%	International More than **1 in 2** expect to be in implementation stages in 5 years	56%

The healthcare delivery marketplace continues to grow — which means significant competition

Health systems need a strategy on how to compete when it comes to digital services and personalized care

It's not just other hospitals and health systems

Virtual health companies and large technology companies are now major rivals

About **1/2** of all US and global respondents report high competition for virtual health (MDLIVE, Teladoc, Amwell)

About **40%** of all US and global respondents report high competition with large technology companies (Apple, Google, Microsoft, Amazon)

47% of international healthcare organizations expect employer-managed health services to be big rivals

Early-stage plans

44% of US providers expect to partner with competitors to deliver personalized care

About **45%** of international health systems expect to compete

Payer organization insights
We surveyed 145 payer organization respondents across 4 global regions

US: Large health plans, Blues' affiliates, Pharmacy benefits managers, Regional plans, State/local plans, Integrated delivery networks

INTERNATIONAL: Government, Private insurer, Other

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

Focus area	US	International
Mental and behavioral health	66%	49%
Chronic/ critical illness	56%	37%
Preventive and wellness care	55%	53%
Health equity/social determinants of health	25%	29%

Improving healthcare affordability and personalized care are the top strategic digital transformation goals

US:
- Improve care coordination **48%**
- Improve care access **46%**
- Improve healthcare affordability **43%**

INTERNATIONAL:
- **43%** Improve care quality
- **40%** Deliver more personalized patient care
- **38%** Increase wellness focus

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

US		INTERNATIONAL
74%	Digital Transformation	51%
64%	Personalized care	44%

To enhance personalized care ...

Payers will expand leveraging nontraditional approaches and care sites

- Mental and behavioral health services
- Retail clinics
- Online-only healthcare services
- On-demand house calls
- Social approach to care
- Community-based approaches

To drive personalized care ...
US payers plan to offer increased member incentives in next 5 years

69%	62%	55%	49%	48%
Personalized wellness visits and health counseling	Reduced healthcare premiums	Reward cards	Medical advocacy services	Same-day/ next-day appointments

In the 2022 Future of Healthcare Report, HIMSS and its Trust Partners — Accenture, The Chartis Group and ZS — uncover 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)

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*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.