

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:

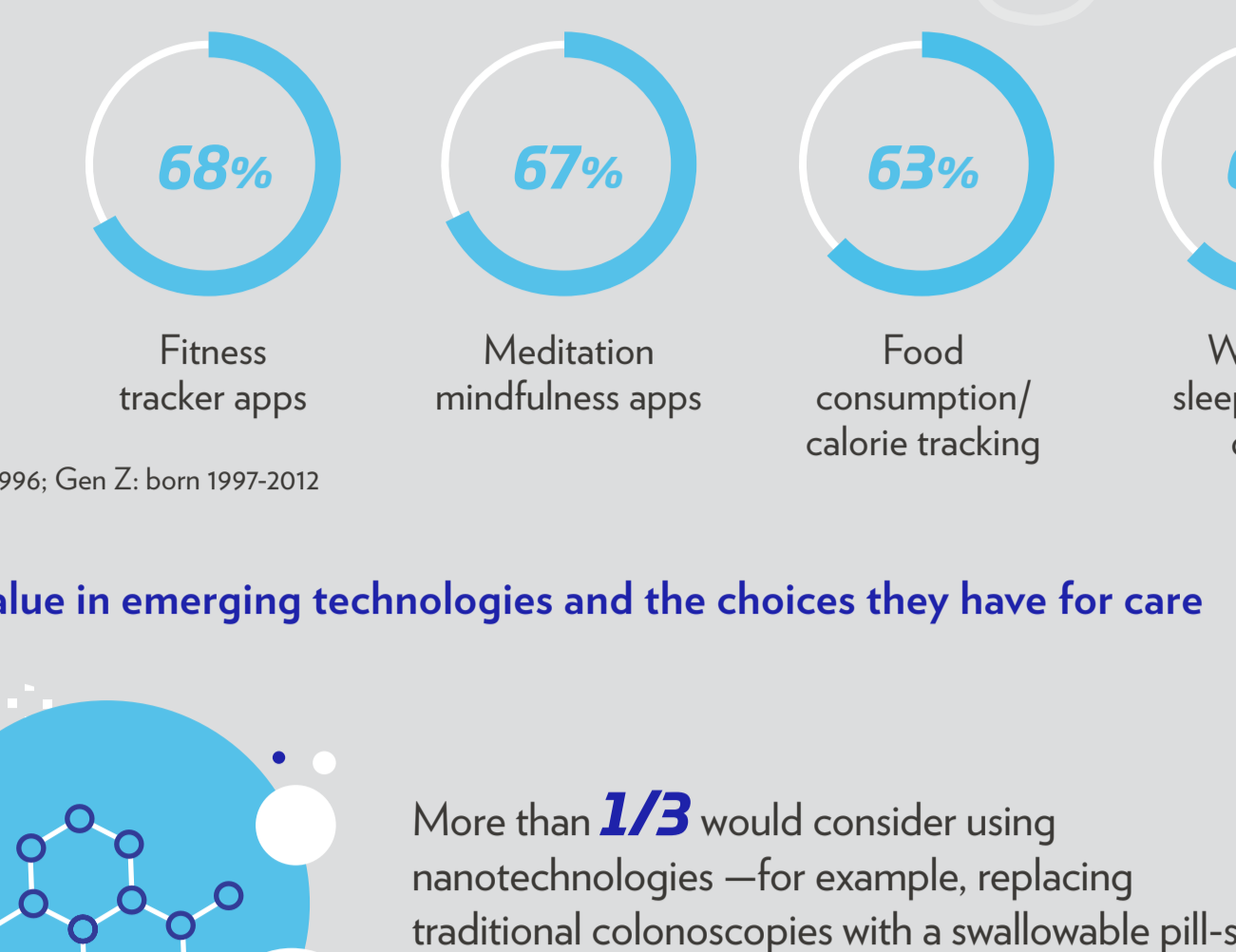
Patient insights

We surveyed 1,600 patients across 4 global regions



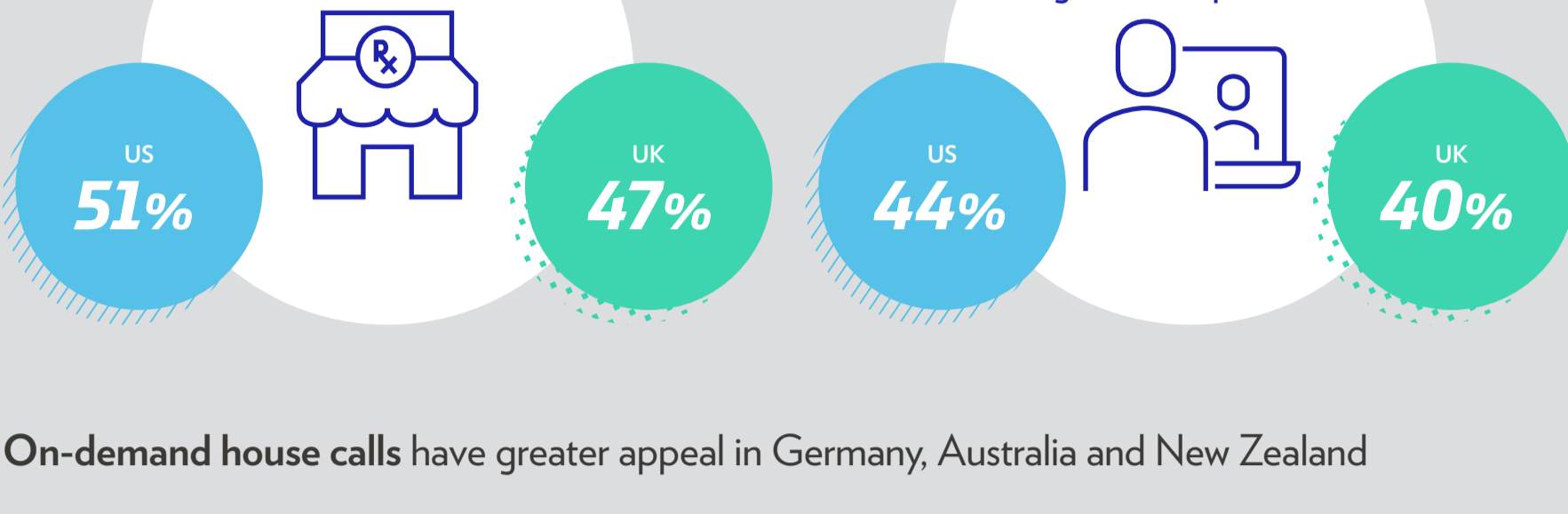
Here's what they conveyed across the globe:

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



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



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

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



They have preferences for convenient patient care

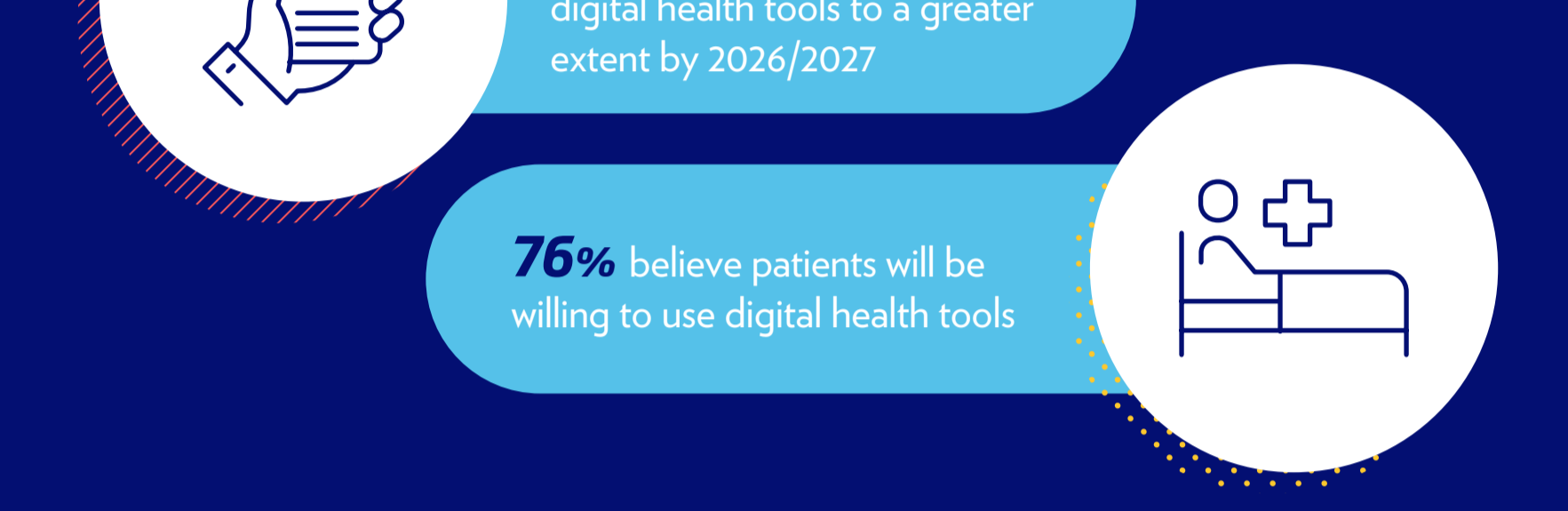
US and UK patients are most likely to use retail clinics and online urgent care centers in the next 3 to 5 years



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

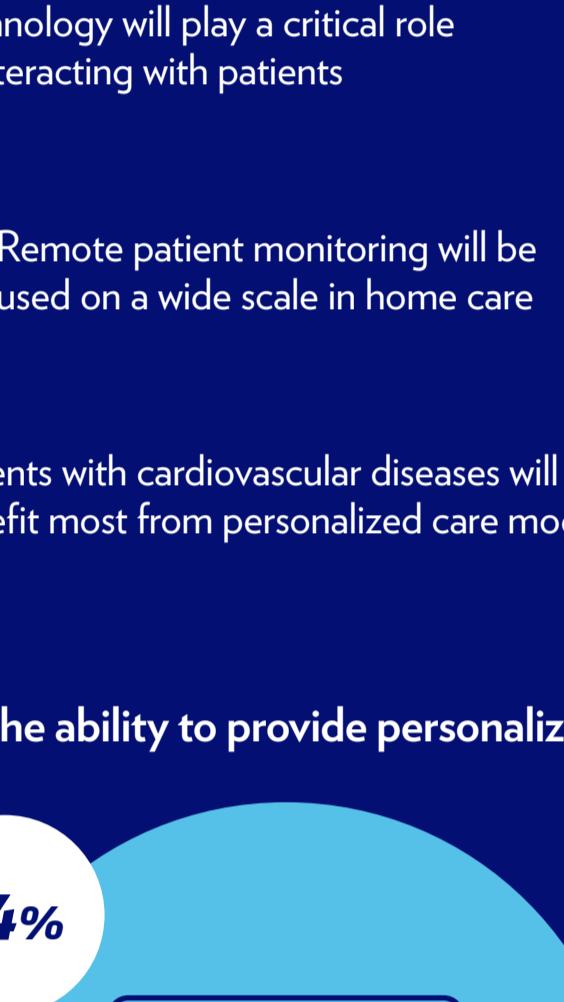


Wherever the care journey takes them, patients of all ages are willing to share their collected health data with providers



Looking ahead to an ideal world

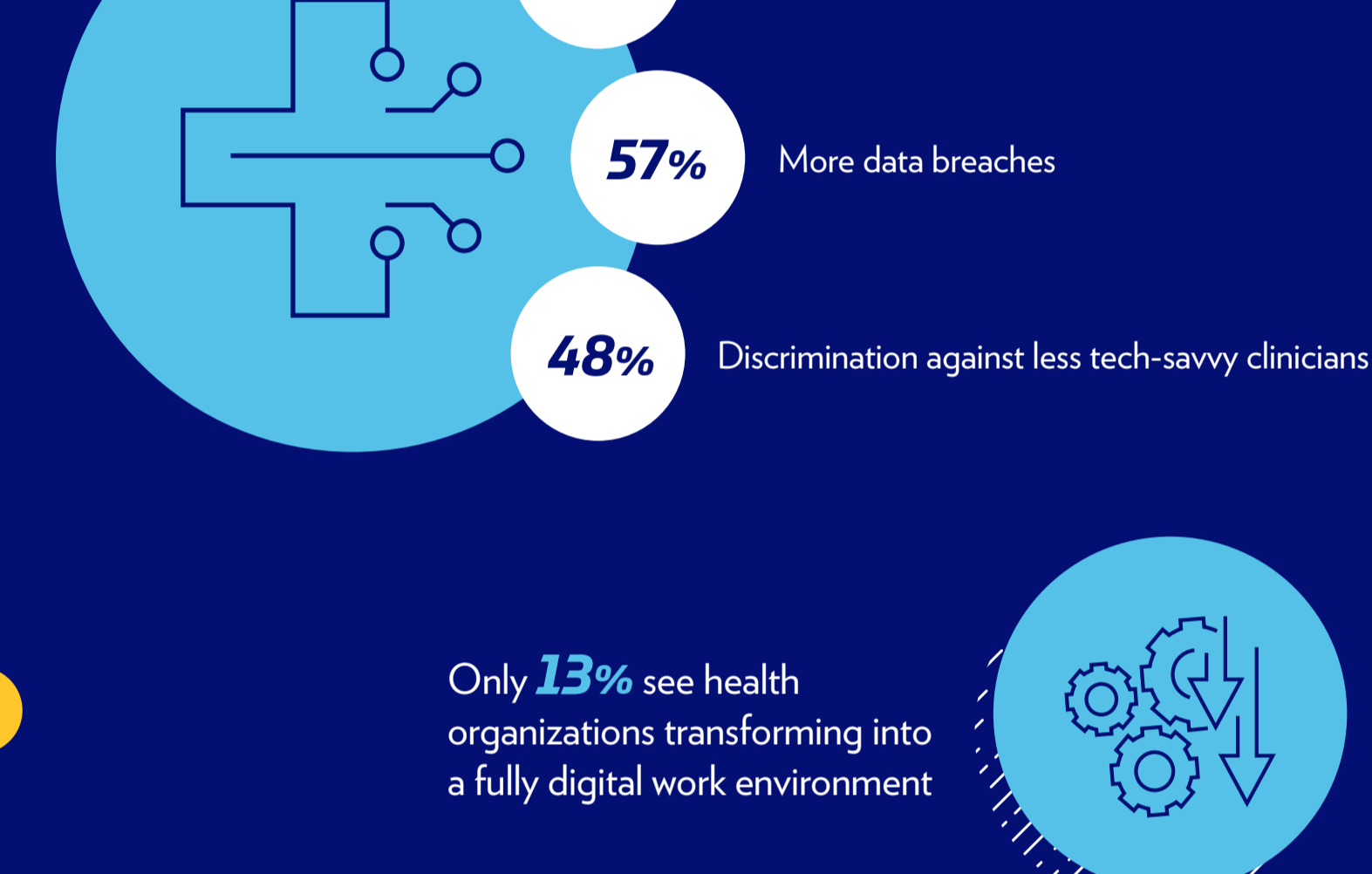
Patients say it's crucial for providers to partner with them to drive personalized care



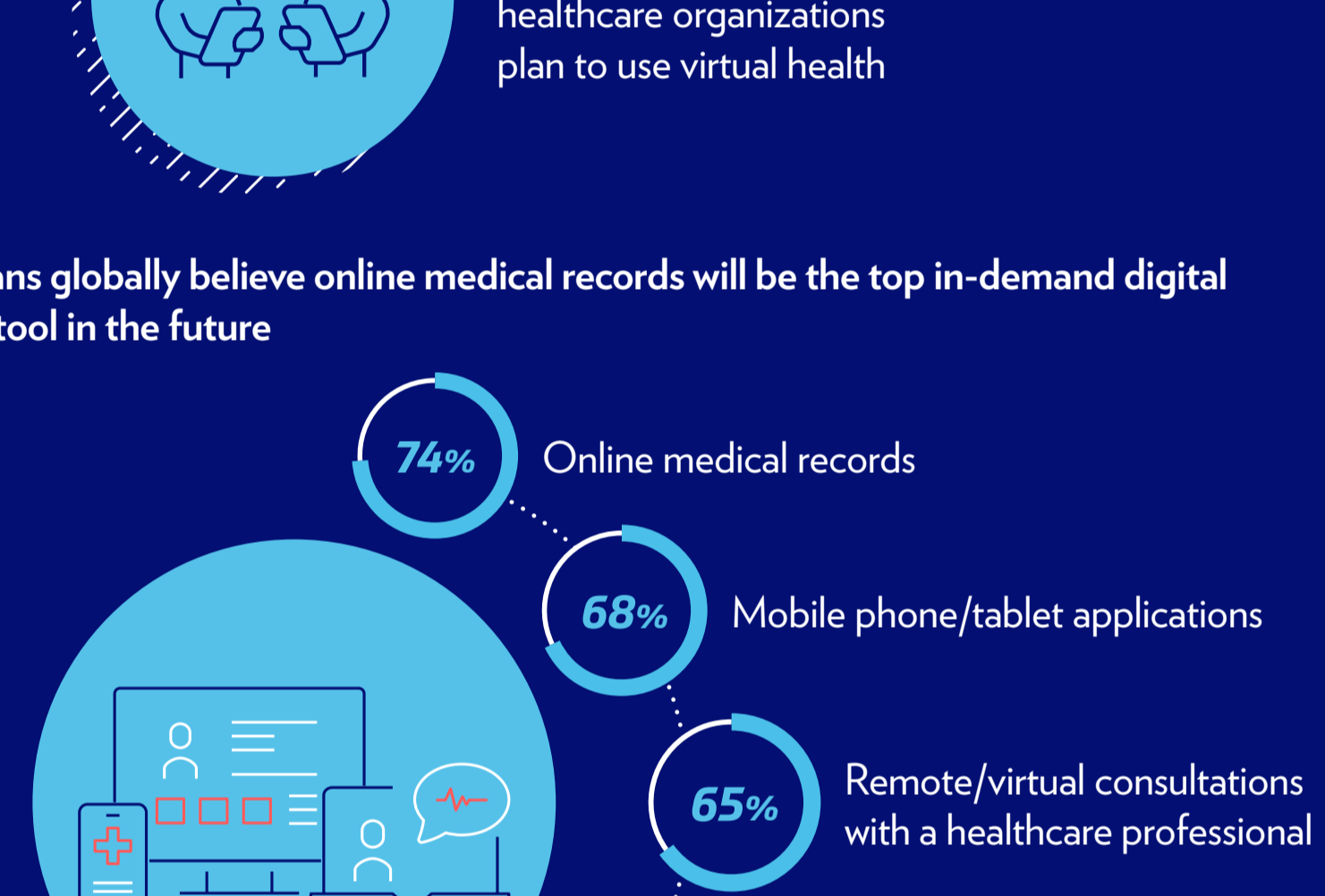
Clinician insights

We surveyed 359 clinicians across 4 global regions

Clinicians report digital health tool use will grow



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



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



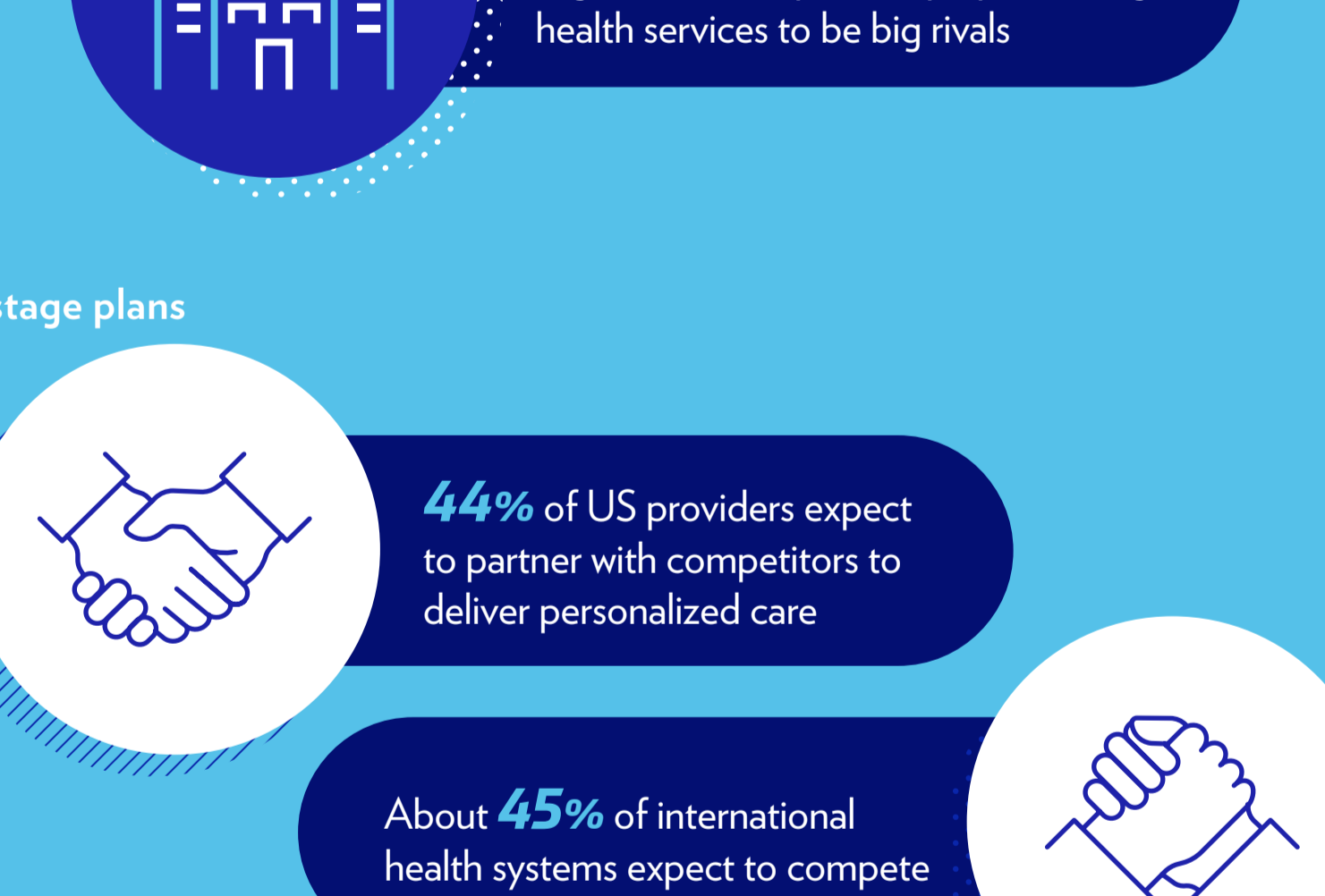
They also see risks of healthcare digitalization



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

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

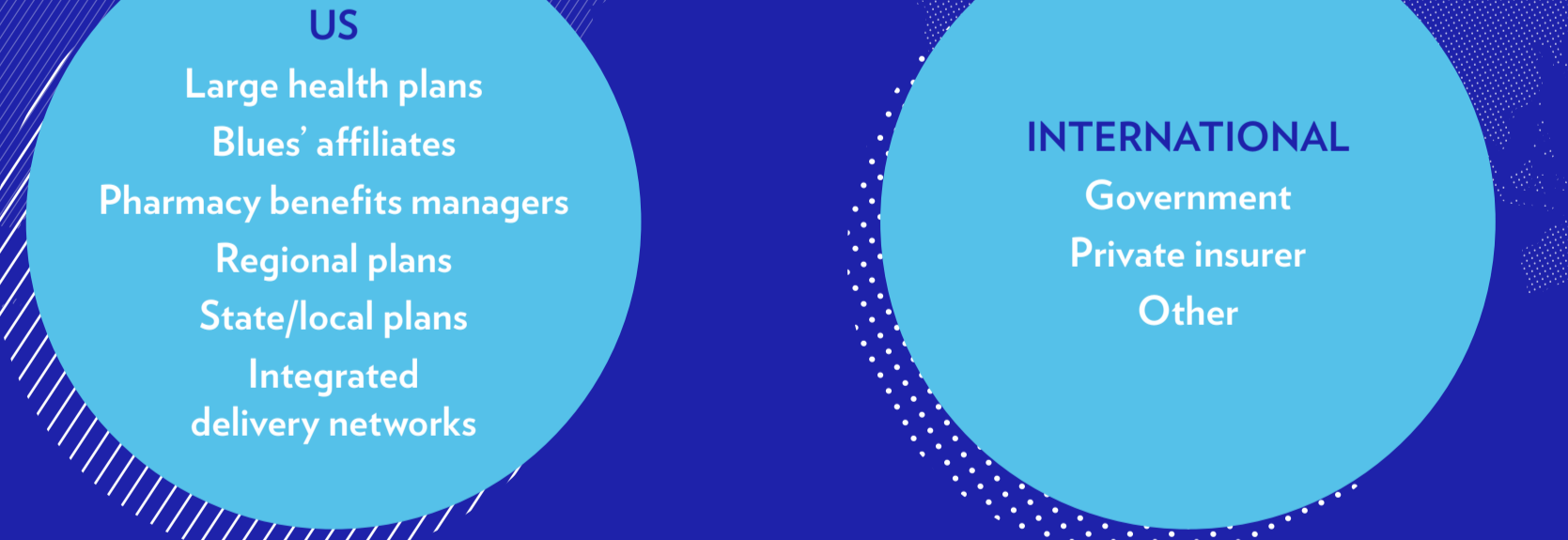
Clinicians globally believe online medical records will be the top in-demand digital health tool in the future



Health system leader insights

We surveyed 273 health system leaders across 4 global regions

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

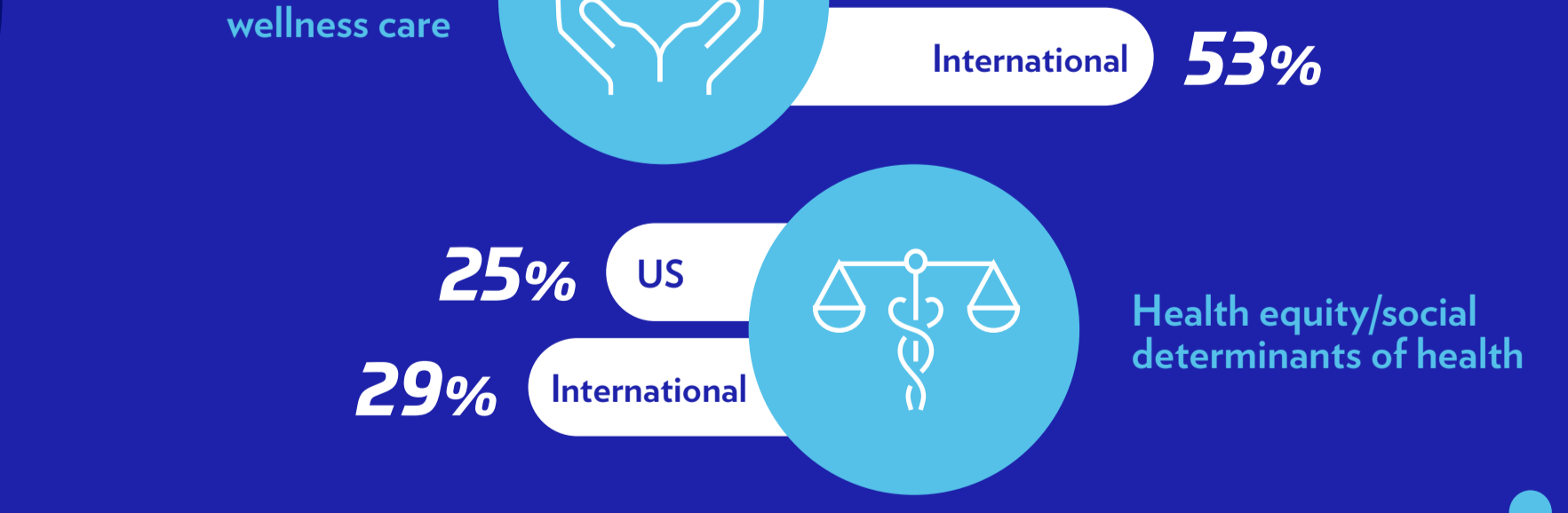


The healthcare delivery marketplace continues to grow — which means significant competition



It's not just other hospitals and health systems

Virtual health companies and large technology companies are now major rivals



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

Early-stage plans



Payer organization insights

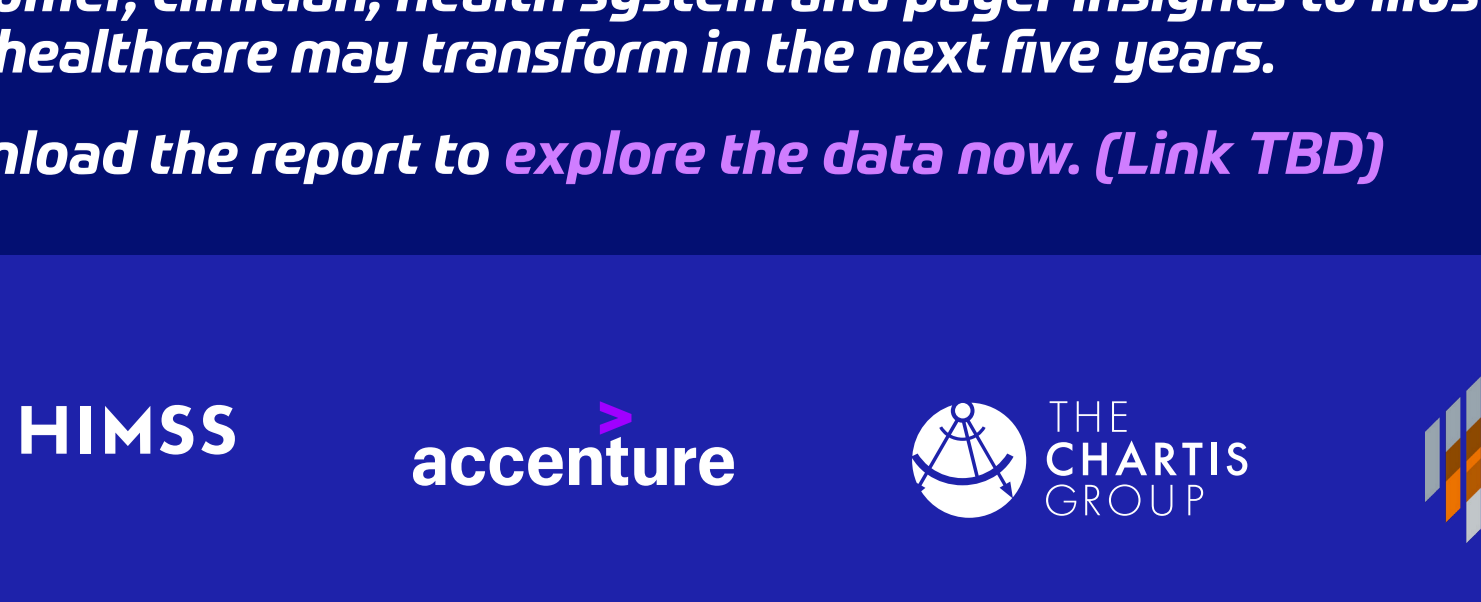
We surveyed 145 payer organization respondents across 4 global regions



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



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



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



To enhance personalized care ...

Payers will expand leveraging nontraditional approaches and care sites

To drive personalized care ...

US payers plan to offer increased member incentives in next 5 years

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)

*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.