



IDC FutureScape: Worldwide Healthcare 2017 Predictions

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Logistics

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Lynne A. Dunbrack
Research Vice
President

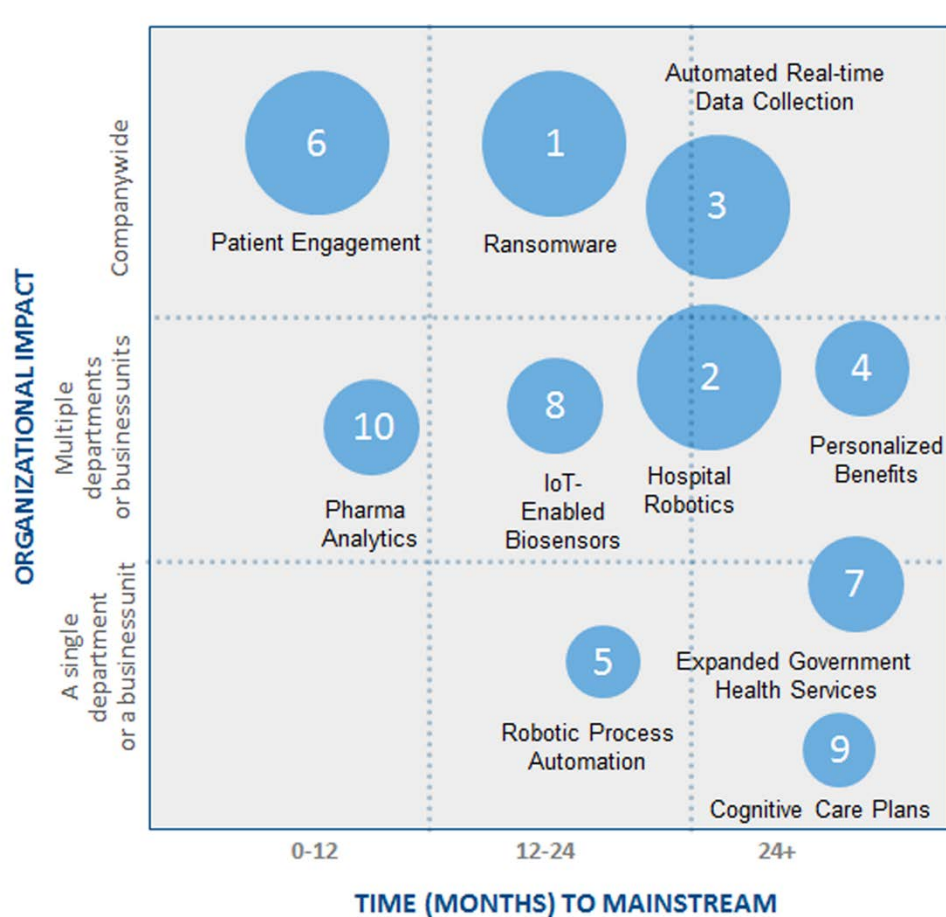


Cynthia Burghard
Research Director



IDC FutureScape

Worldwide Health Predictions Figure 1



- 1 By 2018, there will be a doubling of ransomware attacks on healthcare organizations.
- 2 By 2019, there will be a 50% increase in the use of robots to deliver medications, supplies, and food throughout the hospital.
- 3 By 2019, 60% of healthcare applications will collect real time location data, clinical IoT device data and embed cognitive capabilities to discover patterns, thereby freeing up 30% of clinicians' time.
- 4 By 2020, 20% of payers will offer personalized benefits with options for a consumer to dynamically reduce premium and/or alter deductible/co-pay by disclosing personal health data.
- 5 By the end of 2018, payers will have saved \$1 billion globally through implementation of robotic process automation (RPA) tools, skillsets and process reengineering.
- 6 In 2017, patient engagement across the life science/health care ecosystem will jump from passive to active.
- 7 By 2020, 70% of the developed nations will homogenize health insurance with the rest of the world, moving to replacing self/employer-based options with expanded government sponsorship.
- 8 Seeking a passive way to measure patients' vital signs and other biometrics, more than 40% of healthcare organizations across the world will use IoT-enabled biosensors by 2019.
- 9 By 2020, care plan adjustments will be made in real time with cognitive/AI using data from wearable devices, resulting in 20% more patients being engaged in their health.
- 10 By 2018 drug makers will double their investment in analytics focused on HCP data to reach millennial and Gen-X doctors the way they prefer it – electronically.



Drivers for Worldwide Healthcare Predictions, 2017

IDC Health Insights identified six drivers of healthcare IT investment, and they are:

- ✓ DX: Technology-centric Transformation Altering Business and Society
- ✓ Everything, Everywhere: The Rise of Computer-based Intelligence
- ✓ Disruptive Fault-lines: Security, Privacy, and Regulation
- ✓ Connected Conflict: Convergence of Technology and Privacy
- ✓ The Perfect Storm: Increased Illness Burden
- ✓ Convergence of Mobile, Social, and Sensors

*For additional details on the above Drivers, please refer to report
IDC FutureScape: Worldwide Healthcare 2017 Predictions*



IDC FutureScape: Worldwide Health Predictions Highlights

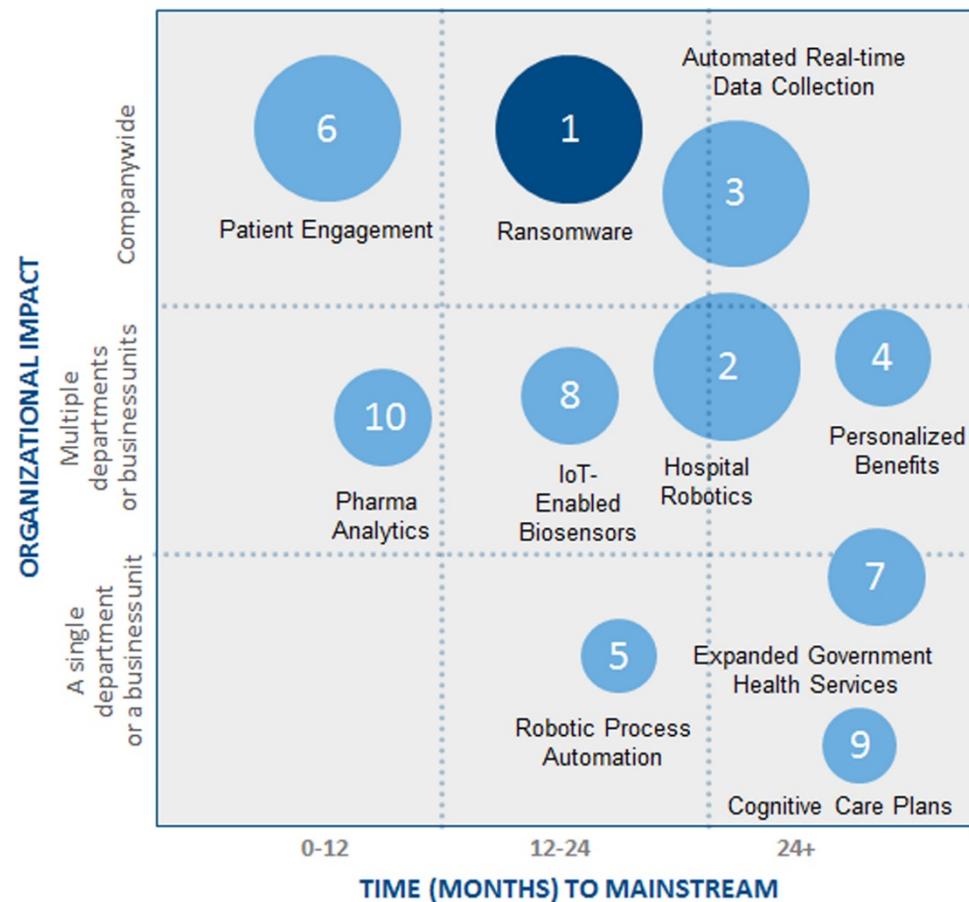
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Prediction 1 - By 2018, there will be a doubling of ransomware attacks on healthcare organizations

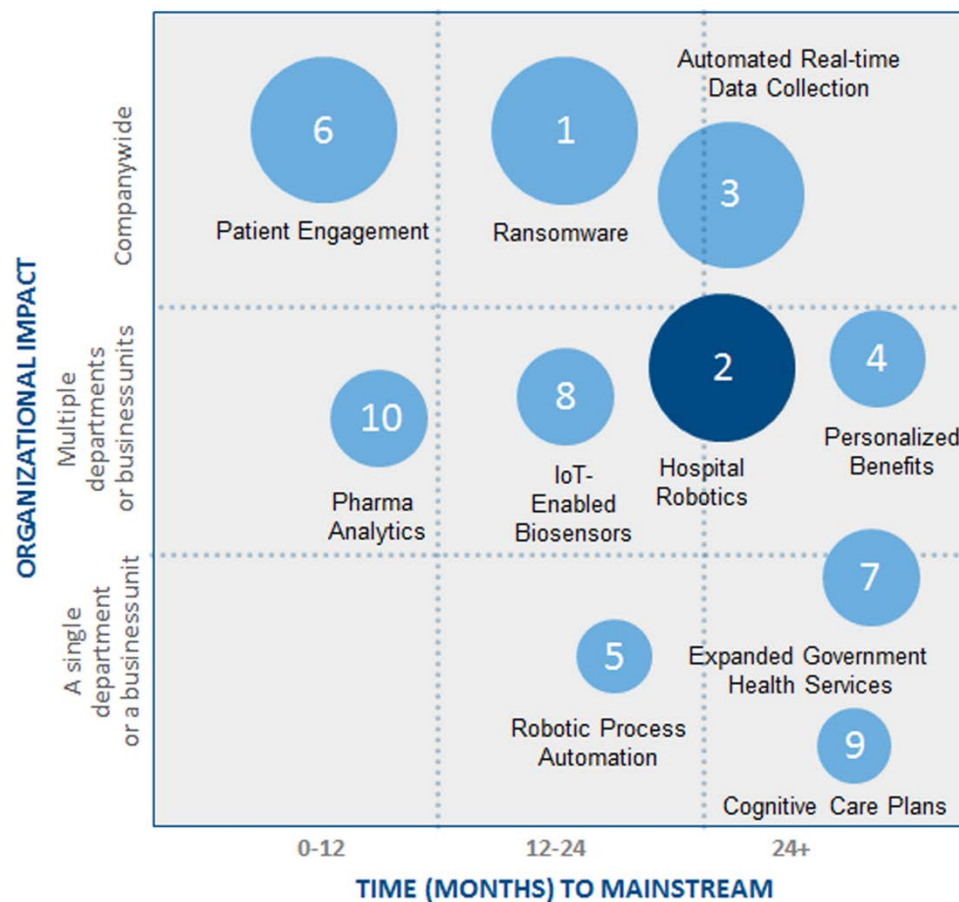
IT Impact	<ul style="list-style-type: none">✓ Already overburdened IT staff further taxed✓ IT systems held hostage for exorbitant ransom payments✓ Mission-critical clinical systems are not available
Guidance	<ul style="list-style-type: none">✓ Educate users that security is everyone's responsibility✓ Design incidence response procedures for cyberattacks✓ Be hypervigilant about patches and SW updates





Prediction 2 - By 2019, there will be a 50% increase in the use of robots to deliver medications, supplies, and food throughout the hospital

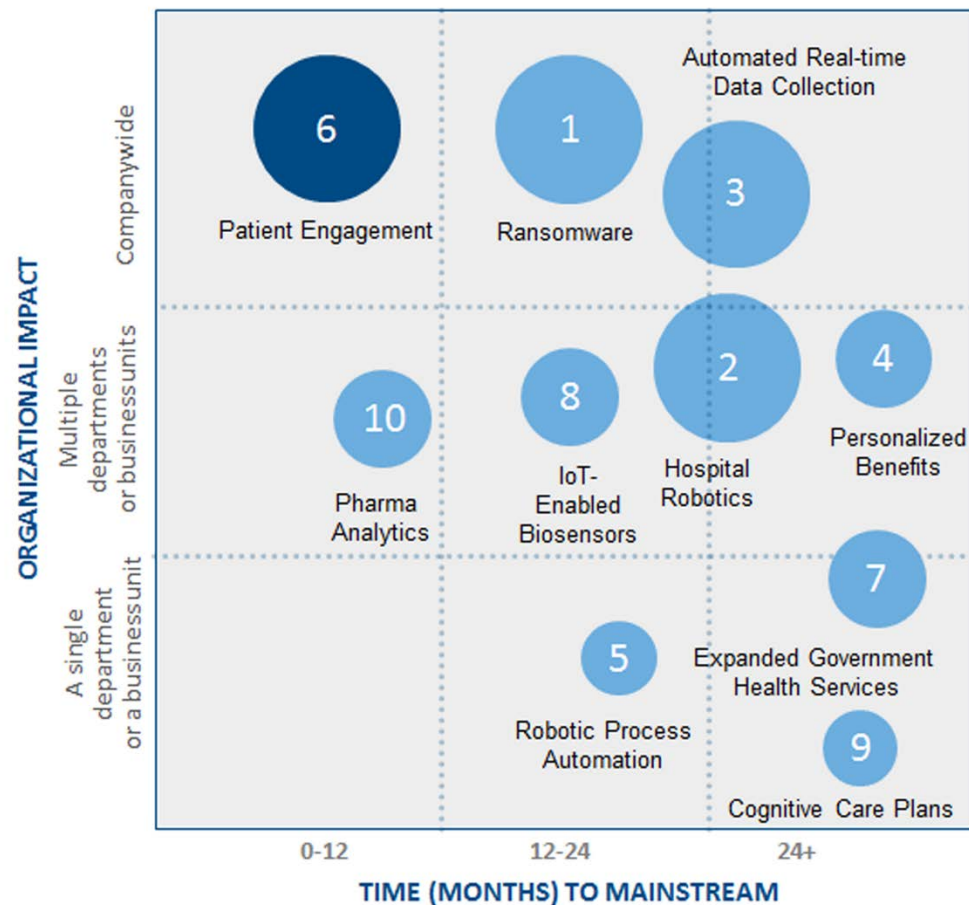
IT Impact	<ul style="list-style-type: none">✓ ROI evidence will increase demand for specialty solutions✓ Maintenance and replacement needs✓ Distribution of sensors and mapping of the facility
Guidance	<ul style="list-style-type: none">✓ Inventory current robotics interest and areas for investment✓ Involve all key stakeholders in the decision process✓ Consider impact on staff when robots are widely deployed





Prediction 6 - In 2017, patient engagement across the life science/health care ecosystem will jump from passive to active

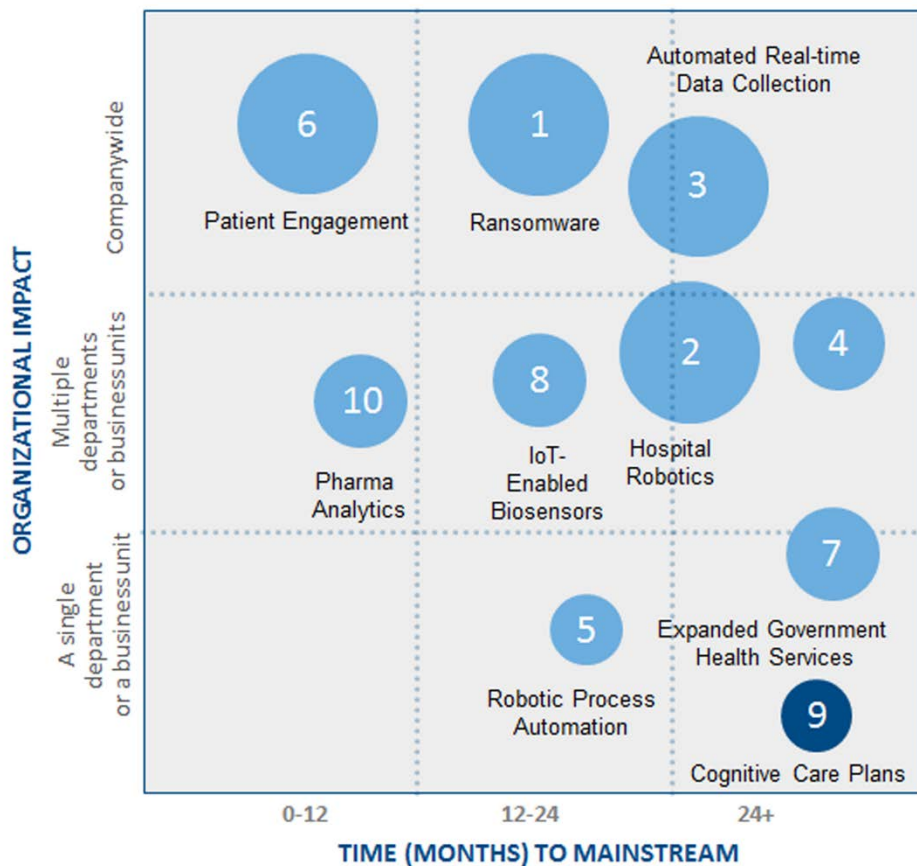
IT Impact	<ul style="list-style-type: none">✓ Wide variety of new, high volume, data streams✓ Diverse patient population require easy-to-use apps✓ Patient-centric app development should focus on usability
Guidance	<ul style="list-style-type: none">✓ Highlight benefits when engaging with consumers✓ Recognize that patient engagement is multi-faceted and targeted✓ Leverage applicable cross-industry best practices





Prediction 9 - By 2020, care plan adjustments will be made in real time with cognitive/AI using data from wearable devices, resulting in 20% more patients being engaged in their health

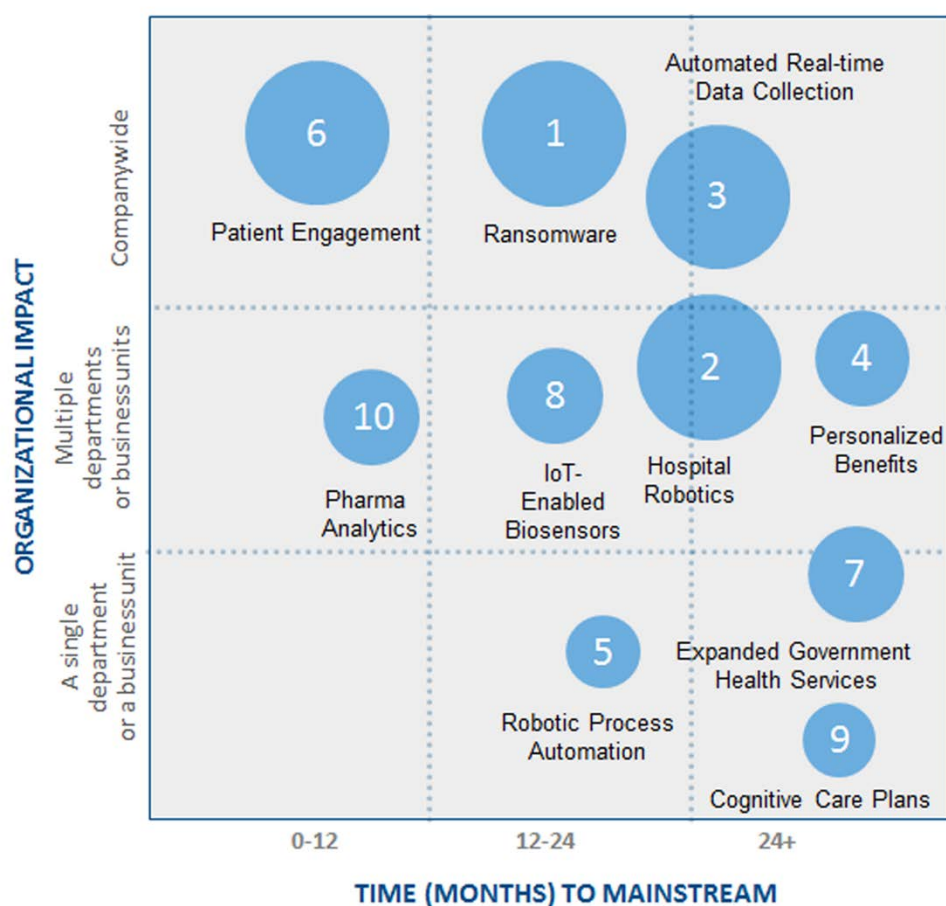
IT Impact	<ul style="list-style-type: none">✓ Wide variety of data, including social determinants of health✓ Predictive analytics to identify at-risk patients willing to make changes✓ Cognitive / AI investments to provide actionable advice
Guidance	<ul style="list-style-type: none">✓ Establish analytics, including cognitive/AI, as a corporate priority✓ Create the algorithms to establish best practices for care management✓ Pilot test to ID the most effective approaches and messages





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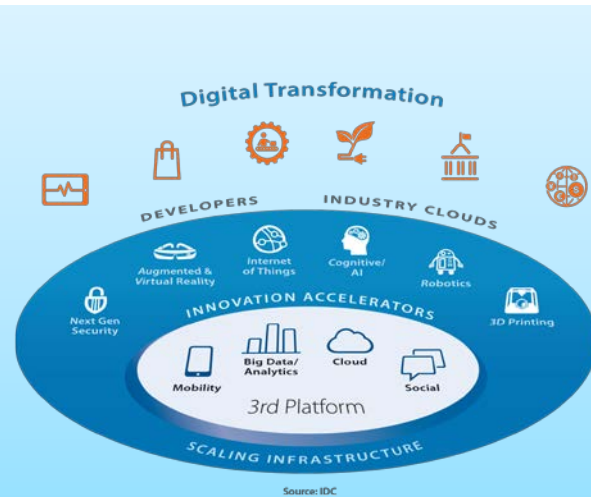
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IDC FutureScape



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Leadership



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Engagement



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worldwide, with **49%** of
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markets

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and local expertise on
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in **over 110
countries**

Significant primary demand-
side research – more than
300,000 end users
surveyed annually

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- Engaging Consumers
- Improving Performance
- Managing Risk



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- Transforming Government
- Prioritizing Government Investments



- Leveraging the Healthcare Digital Convergence
- Improving Health Delivery Models
- Transforming Public Health



- Innovating Product Development
- Innovating Services
- Optimizing the Supply Chain
- Transforming Manufacturing



- Creating the Omni-Channel Experience
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Audience Q&A



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