

## The Future of Health

How technology and prevention  
will drive more equitable and  
sustainable outcomes for all

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# All countries in Europe are facing substantial challenges in continuing to deliver high-quality healthcare



## INCREASE IN DEMAND IS NOT BEING MET BY AVAILABLE RESOURCES

- Ageing populations and changing expectations.
- Rigid and complex financing models.
- Increasing costs of innovation.
- Scarcity of skilled personnel.
- Rising health inequalities and health complexities, exacerbated by climate change and mass migration.



## THE IMPACT OF COVID-19 IS ONGOING

- Unprecedented health, economic and societal crises have compounded deep-seated structural issues.
- The disruption led to all countries increasing their healthcare spending.
- Lessons indicate health is the foundation of resilient productive economies and fair societies.



## HISTORICAL & CULTURAL DIFFERENCES RESULT IN SUBSTANTIAL DISPARITIES

- A 3-fold difference in health spending per capita between Western/ Northern Europe and some Central/ Eastern European countries.
- While nations aspire for UHC, the range of services and extent of cost-sharing varies substantially.
- Diverse pricing and reimbursement models have created inequalities in access to new medicines and technologies.

**The European Commission has committed to levelling up countries with Recovery and Resilience funding focused on digitalisation, primary care and prevention**

Deloitte's global Future of Health campaign believes digital transformation and emergent technologies, AI and open secure platforms, will enable a shift from the current reactive treatment model to a more cost-effective and sustainable approach to holistic health and wellbeing.



*The future of health will be driven by digital transformation enabled by radically interoperable data and open, secure platforms*

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# Healthcare will shift towards more health promotion and prevention



Traditional - Reactive

Responsiveness of services

Non-traditional - Proactive

# The impact of macro market dynamics and health drivers on the future of health

## MACRO MARKET DYNAMICS

COVID-19 pandemic

Stakeholder alignment on climate change and ESG

Health equity

Sustainability of the healthcare workforce

Inflation

## FUTURE OF HEALTH DRIVERS

Empowered consumer

Data sharing

Institutional trust / social compact

Behaviour change/nudging

Continued innovation

Data interoperability

Platforms and hyper competition

Networks and ecosystems

Sick care to well care

## RATE OF CHANGE



Source: Deloitte analysis

Note: Rate of change indicates whether the future of health drivers are currently accelerating (↗) or decelerating (↘) the ecosystem towards the future of health.

● Individual  
● System

# Delivering the Future of Health: Riding the wave of industry innovation

TODAY

European countries are at different points along Wave 1 with some still in Wave 0

2030

By 2040 or earlier



**Wave 0**  
Legacy health ecosystem

- Separate entities/assets serve a given need that is largely reactive and focused on treating illness
- Siloed, disconnected organisations operate largely independently due to misaligned macro-level financial and other incentives



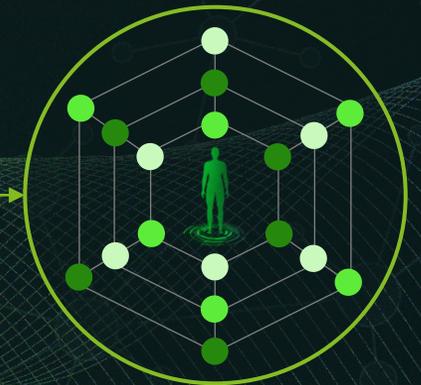
**Wave 1**  
Industry fragmentation

- Explosion of data/ analytics/ consumerisation attract new entrants and begin to fracture the rigid system
- Other macro dynamics (ie. COVID-19) exacerbate fragmentation, and create new routes of access, allowing new entrants to challenge the status quo



**Wave 2**  
Industry re-assembly

- Reconstruction around the empowered consumer, leveraging data and innovation
- Organisations adopt one or more new business models. data is connected and key players converge and form partnerships and collaborations



**Wave 3**  
Age of data-accelerated scientific innovation and beyond

- Networks and ecosystems become increasingly sophisticated and patient centric
- Value from the system comes from maintaining wellness rather than treating sickness



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