SHSMD CONNECTIONS 2019
## COMPOSING THE FUTURE OF HEALTH CARE STRATEGY

Future Signals:
The 10 Out-of-Sector Innovations You Need to Know About

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SHSMD | Society for Health Care Strategy & Market Development℠

AHA Events

Agenda

- **Who We Are**

- **Outside-In Mindset**

- **Outside-In Trends**

- **Q&A**
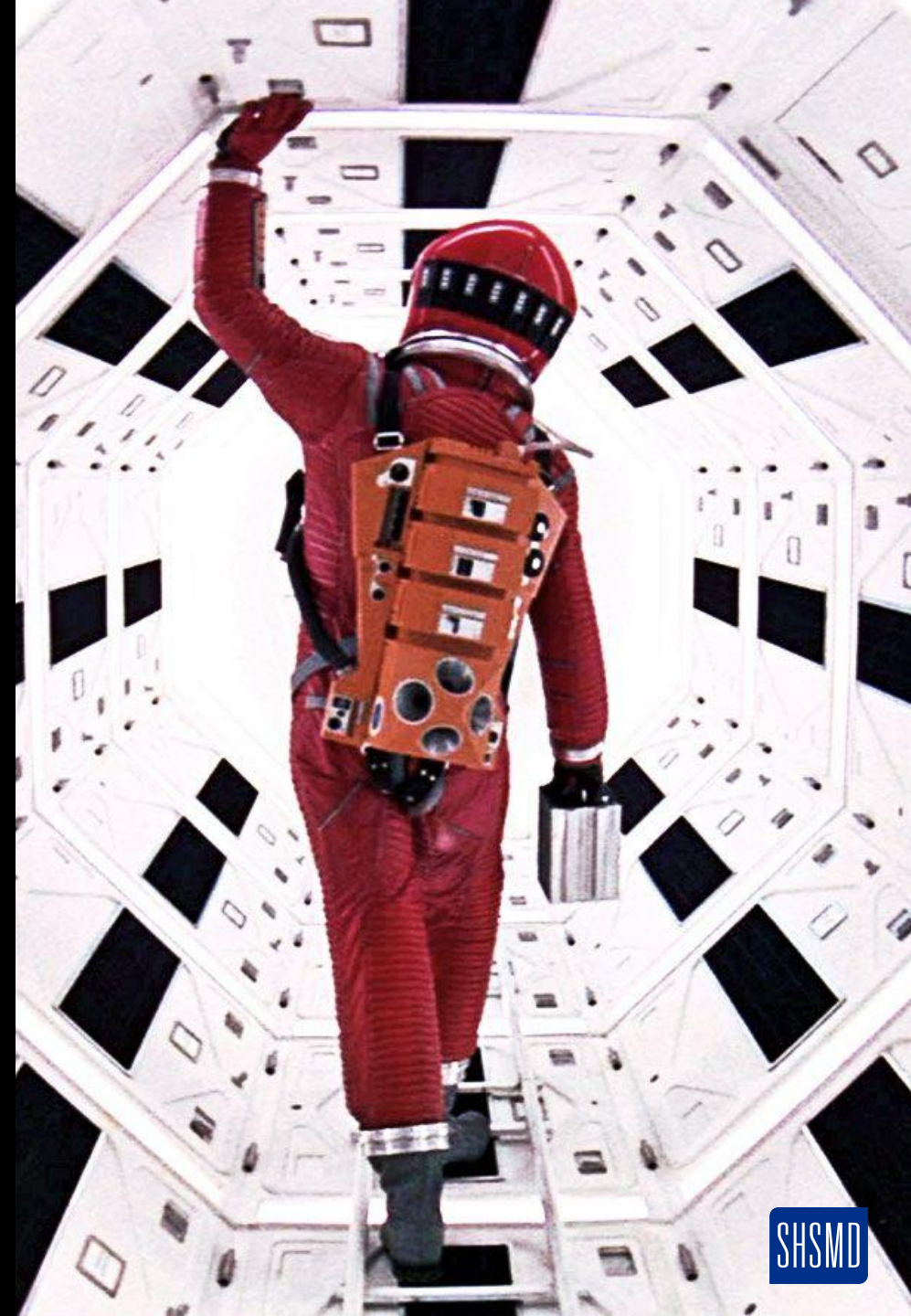
Our Objectives

1. Share a simple and **effective mindset to challenge perceived boundaries** and spark fresh thinking

2. Inspire you with **emerging trends** and how companies **outside healthcare** are enacting and capitalizing on them

3. Provide provocative **thought-starters and opportunities** to take back to your organizations for further exploration

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Who We Are

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What makes a great innovator?

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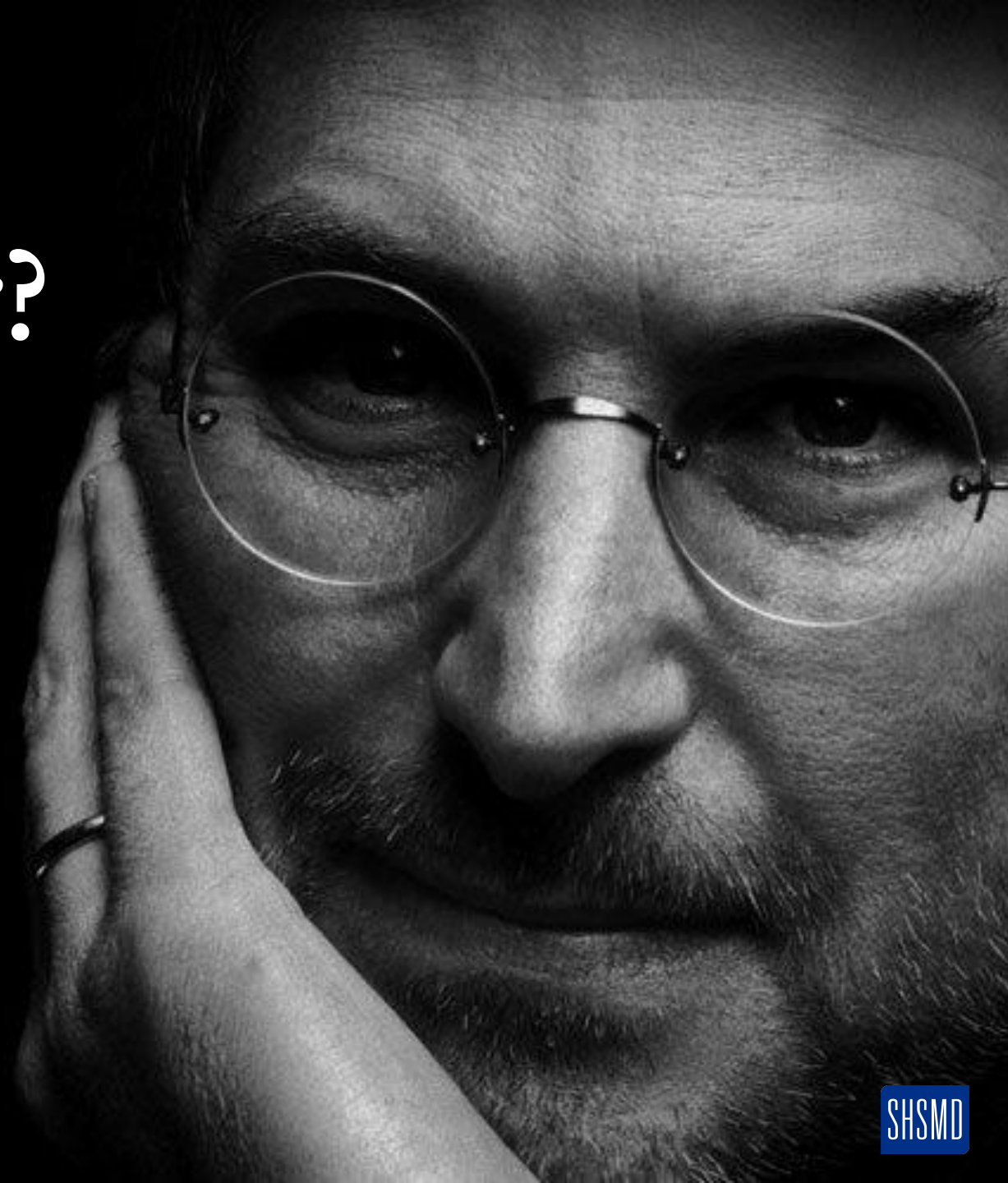
Outside-In Thinking

Outside-In Benefits

- Break free of your bubble and challenge orthodoxies

- Leverage prior innovation effort of others

- Find creative solutions for new and better outcomes

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What You Will See Today

We'll explore a set of out-of-category trends, applying our learnings to healthcare and help inspire fresh thinking.

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Trend 01
Market Indicators

87m

Facebook users affected when Cambridge Analytica gained **unauthorized access** to their personal data[1]

9%

Of US adults believe they have "**a lot of control**" over the data that is collected about them[2]

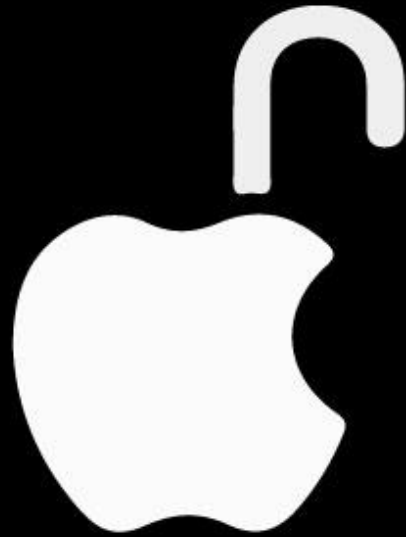**$200b**

Data-broker industry annual revenue[3]

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Trend 01

Data with Discipline

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Amazon's Surveillance as a Service

Apple's Privacy as a Product

01 Data with Discipline
Thought Starter

How might we use data to **catalyze productivity** *for healthcare providers, without compromising* **patient trust**?

Potential Implications

- Decision-making around technology providers and security infrastructure

- Designing patient portals and live interfaces that offer greater transparency around, and control of, personal health data

- Leveraging patient data to streamline before, during, and post visit interactions with HCPs and staff

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Trend 02
Market Indicators

93%
Of consumers are likely to **make repeat purchases** with companies who offer excellent customer service[4]

$1.6t
Estimated cost of customers **switching providers due to poor service** in the US[5]

12
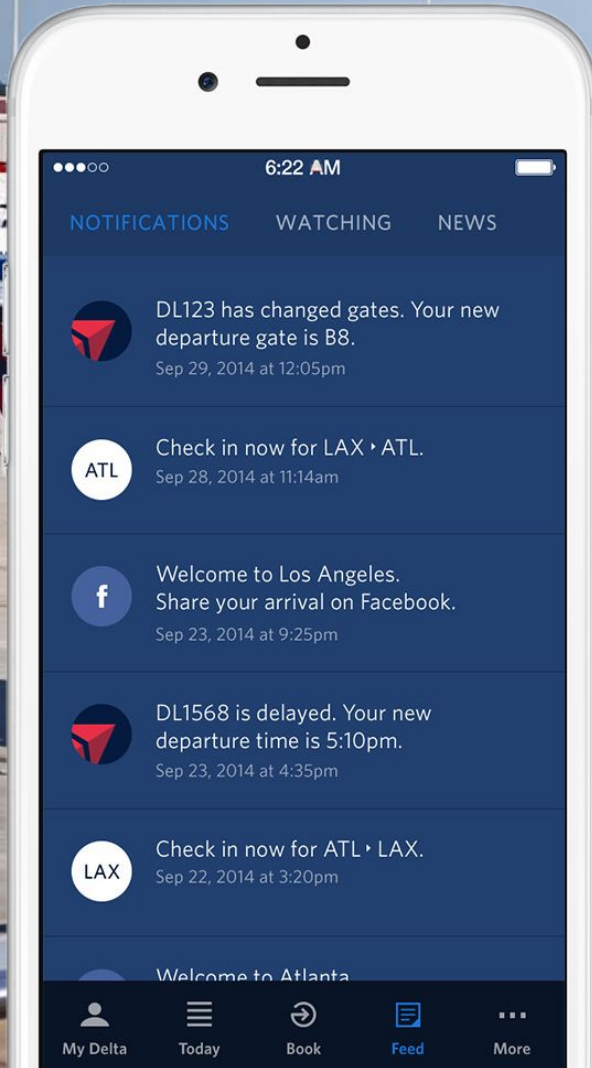Number of positive customer experiences it takes to **redeem one unresolved negative experience**[6]

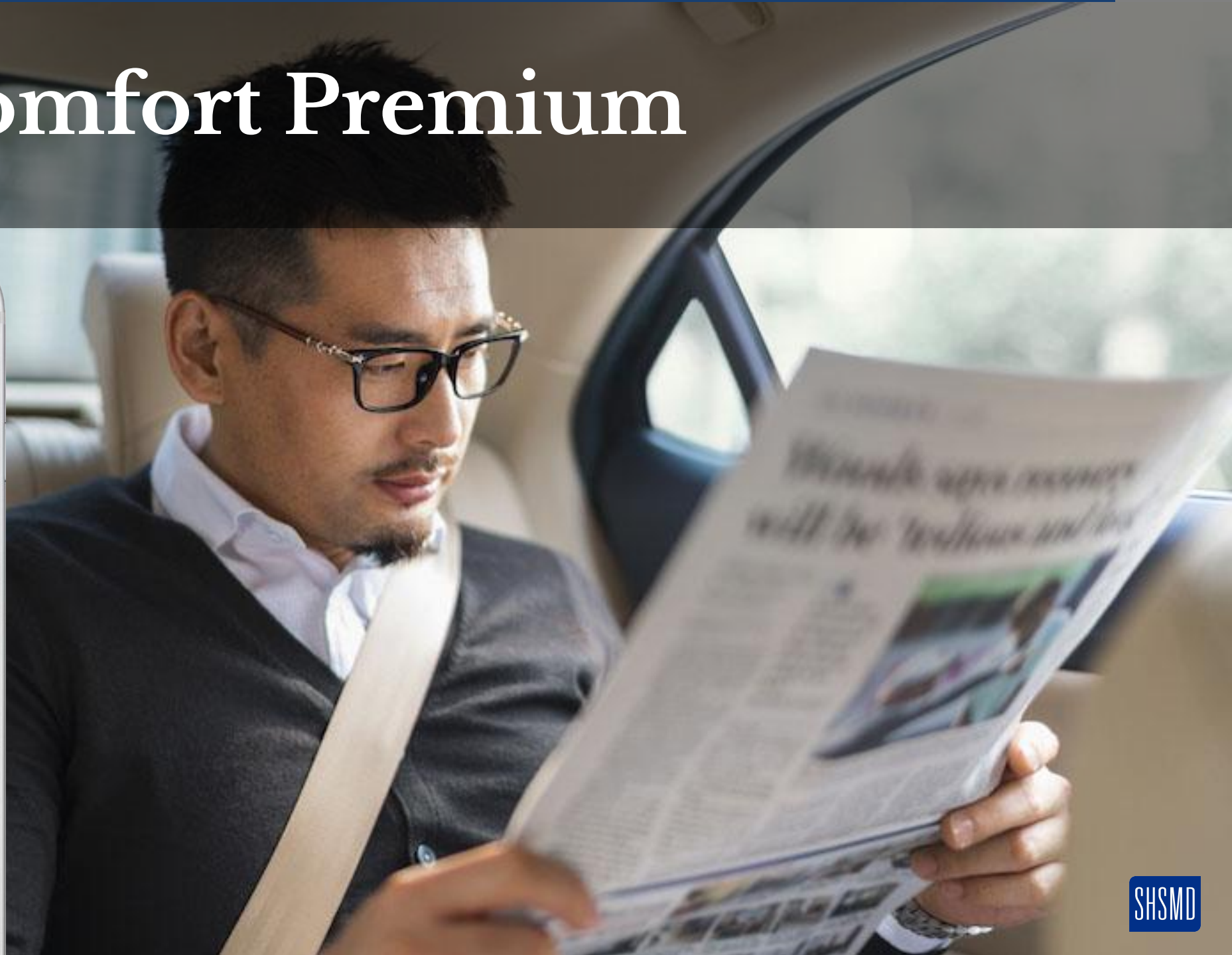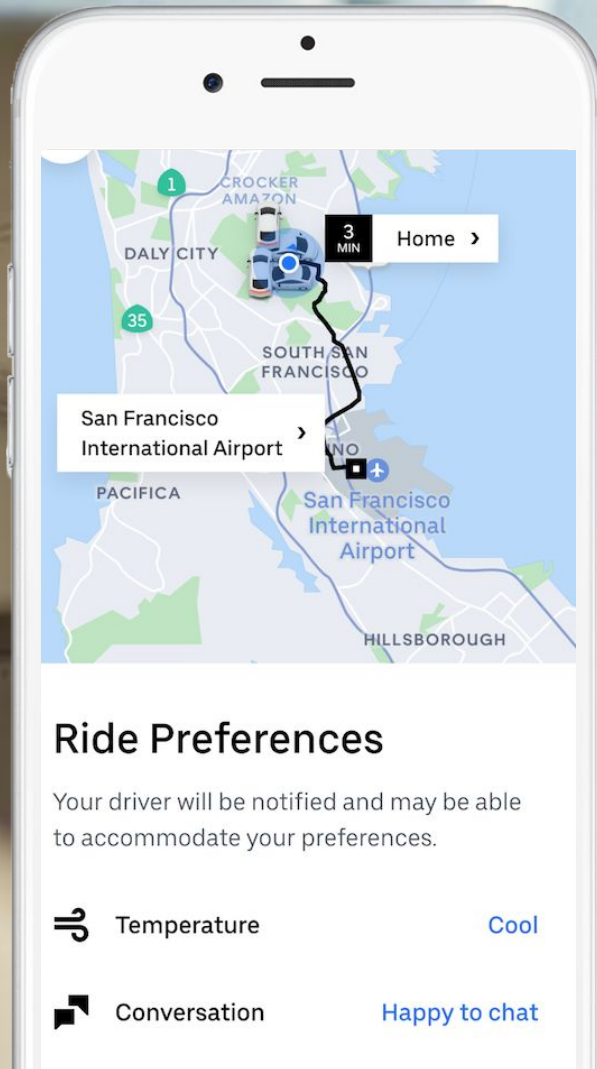Source: 4. HubSpot Research 5. Accenture 6. Forbes

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Trend 02

# Micro-Moments
# of Truth

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Uber's Comfort Premium

How might we identify previously **overlooked touchpoints** *that will meaningfully enhance the* **patient experience**?

Potential Implications

- Extending relationship with patient beyond the walls of the hospital through digital / telemedicine / other

- Experience design for hospital rooms and public spaces e.g. waiting areas

- Greater consideration around the cadence and content of patient communications

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Trend 03
Market Indicators
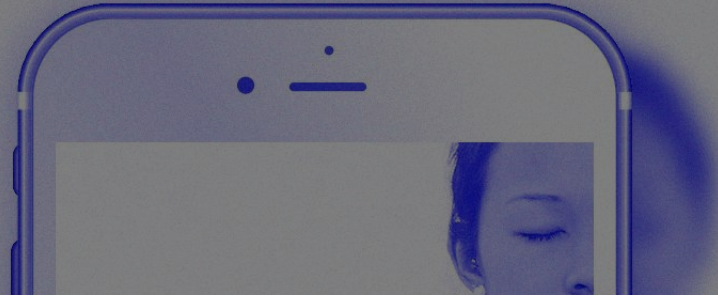
14%

Of the US population **practiced meditation** in 2017, up from 4% in 2012[7]

$9.9b

Size of the US **self-improvement industry**, incl. products related to self-esteem, emotional and physical health and self-help[8]

$4.2t

Size of the **global wellness industry**, with 12.8% growth from 2015-17[9]

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Trend 03

Democratizing Wellness

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Parsley's Biophilic Design

*How might we **infuse holistic wellness** practices into the patient experience inside and outside the treatment room?*

Potential Implications

- Expanding insurance coverage to include wellness offerings

- Supporting research around the impact of wellness practices on physical health outcomes

- Creating accessible moments of wellness for patients and caregivers inside healthcare facilities

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Trend 04
Market Indicators

50%
Of online consumers globally **use digital voice assistants**, up from 42% in 2018[13]

37%
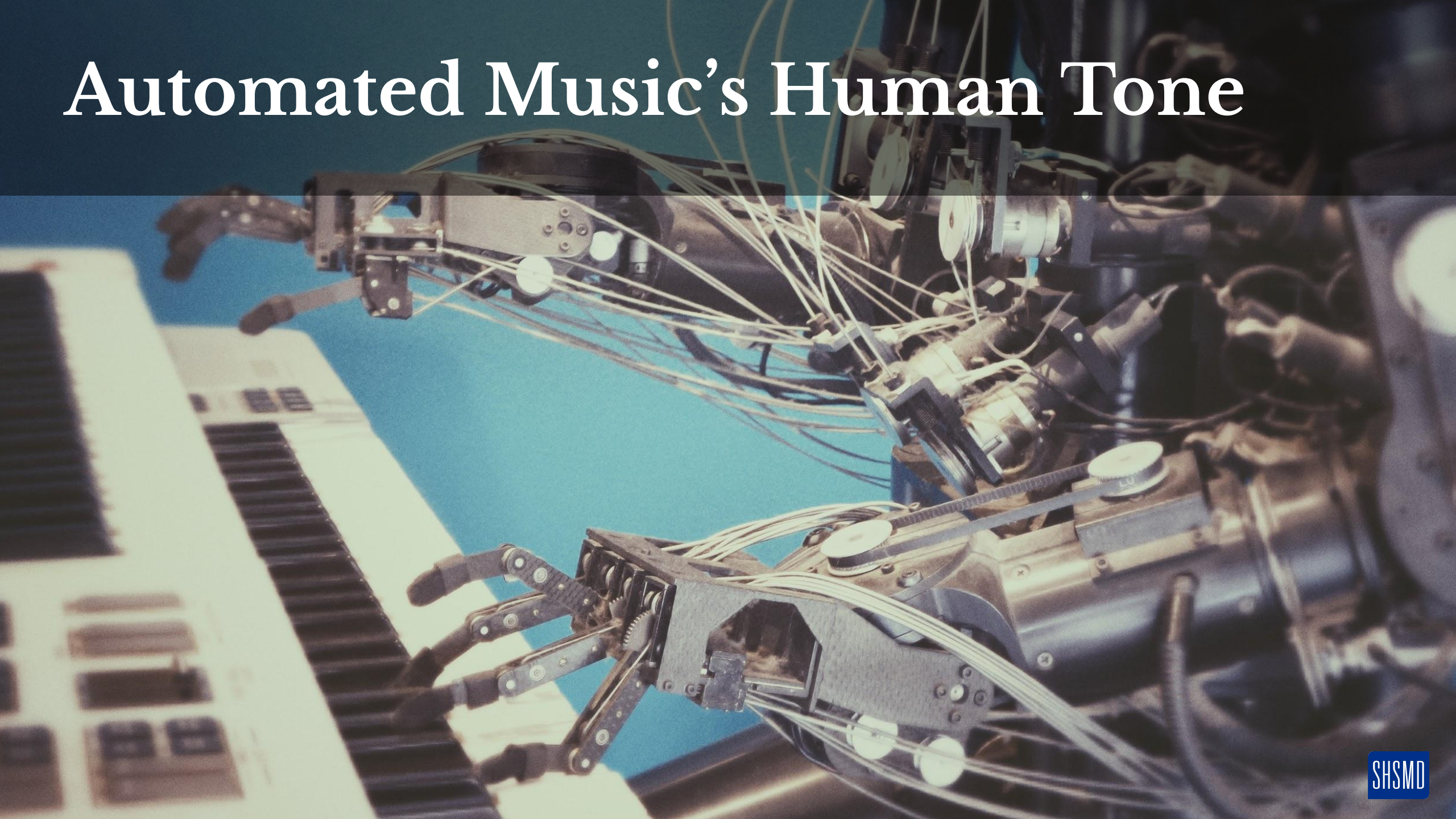Of voice tech users love their voice assistant so much they **wish it were a real person**[14]

74%
Of voice tech users believe brands should have **unique voices and personalities** for their apps or skills[15]

Source: 13. Accenture 14. J. Walter Thompson 15. J. Walter Thompson

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Trend 04

Vocal Velocity

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Automated Music's Human Tone

Duplex's Convincing AI

05 Vocal Velocity
Thought Starters

*How might we leverage voice technology to both **humanize interactions** and improve the **efficiency and efficacy** of our services?*

Potential Implications

- Creating unique brand voice for marketing and communications

- Extending presence to include digital assistants in home / on-the-go, helping patients accept and engage

- Leveraging voice-based AI in operating and treatment rooms to support HCP and staff

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Trend 05
Market Indicators

36%

Of US adults report **never having seen a therapist,** but being open to it (23% say they never would)[10]

+90m

Venture capital raised by Hims ($97M) and Roman ($91.1M) — DTC health companies providing **treatments for 'taboo' conditions such as ED and hair loss**[11]
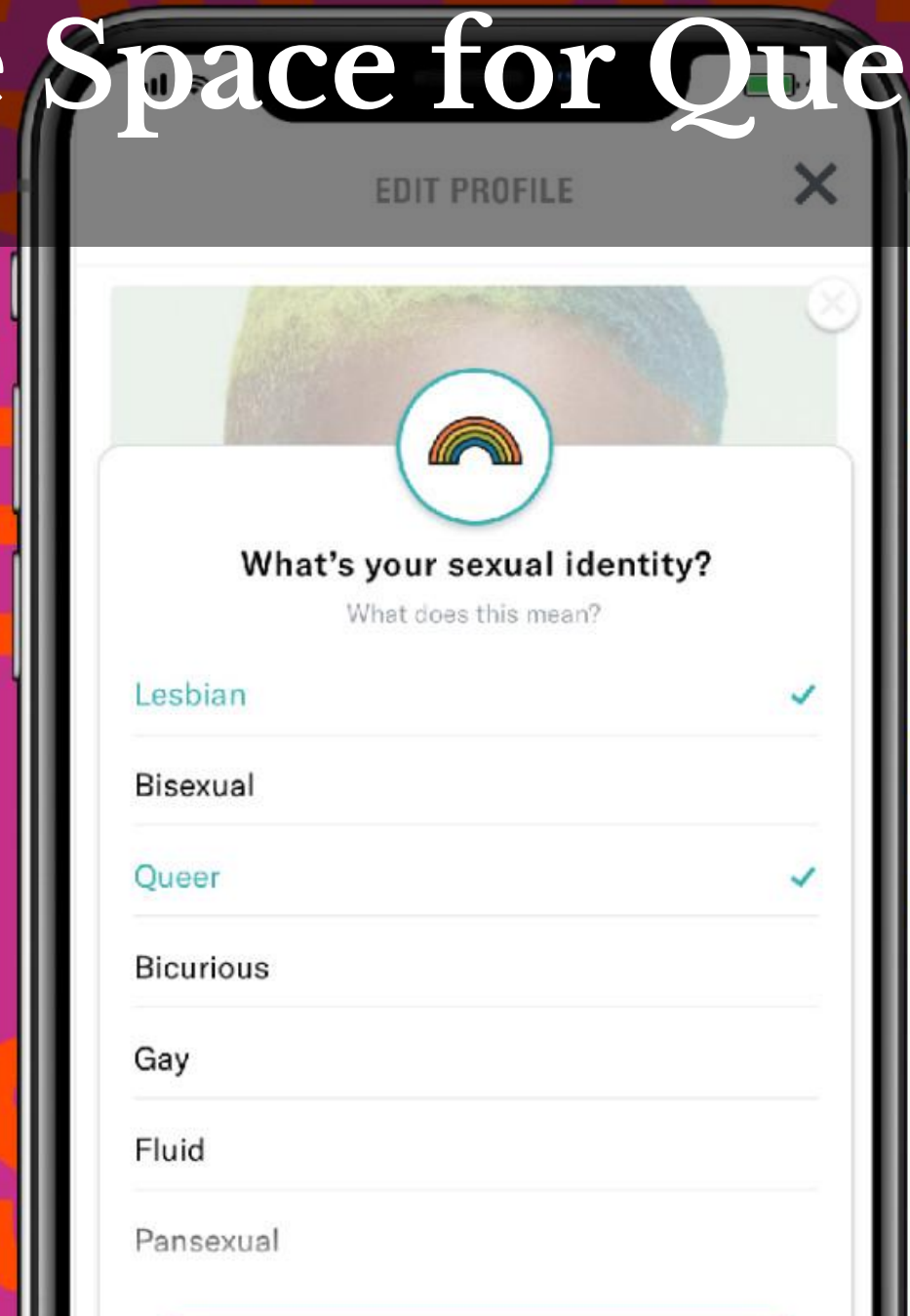
123b

Expected size of the **global sexual wellness market by 2026**, up from $39b in 2017[12]

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Trend 05
Taking on Taboos

HER's Safe Space for Queer Women

EDIT PROFILE ✕

What's your sexual identity?
What does this mean?

Lesbian ✓

Bisexual

Queer ✓

Bicurious

Gay

Fluid

Pansexual

Nurx's 'Uber of Birth Control'

How might we integrate new, more **discreet channels** and interaction options to **minimize barriers** to seeking treatment?

Potential Implications

- Supporting existing formal and informal digital platforms with professional monitoring / vetting

- Creating anonymous or discreet ways for patients to seek medical help

- Autonomous approach to in-person visits and/or DTC testing for sensitive conditions

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Trend 06
Market Indicators

$35b

Projected **annual cost of climate change** to US taxpayers in 2050[16]

65%

Of global consumers will **not buy a brand** if it stayed silent on an issue they felt it had an obligation to address[17]

48%

Of consumers would **change their consumption habits** to reduce their environmental impact[18]

Source: 16. Fourth National Climate Assessment 17. Edelman 18. Nielsen

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Trend 06

Conspicuous Conservation

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Reformation's Eco-Aesthetic

NEW

$328.00

STORY   FIT

RefScale	This garment	Industry standard	Savings
H_2O	1011 gal.	1248 gal.	237 gal.
CO_2	7 lbs.	68 lbs.	61 lbs.

Learn more

This is made from deadstock materials. Every season, thousands of yards of fabric go to waste from fashion houses that over-ordered. The textile industry is one of the most chemically dependent industries on earth and the #2 polluter of clean water. We're trying to lessen the blow by using fabric that already exists, because we heart dolphins.

COLOR	SIZE	QUANTITY
Ibiza	-	1

Google's Food Waste Turnaround

06 Conspicuous Conservation
Thought Starters

How might we use technology to ***improve sustainability*** *within our sector, and* ***get credit for it****?*

Potential Implications

- Taking inventory of waste produced across facility operations and setting targets for improvement

- Exploring more sustainable and renewable practices e.g. solar energy generation, biodegradable packaging

- Marketing and communications outlining goals and achievements e.g. external certifications / awards

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Trend 07
Market Indicators

87%

Of employees believe **gamification makes them more productive**[19]

250m

Size of the Fortnite player base in 2019, **over 2/3 the size of the entire US population**[20]

100m

Viewers watched League of Legends World Championship series on Twitch, **nearly as many people as watched the 2018 Super Bowl**[21]

Source: 19. TalentLMS 20. Business Insider 21. Rift Herald

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Trend 07

Creator
Communities

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Fortnite's Fandom

Citizen's Community Watch

*How might we use virtual spaces to encourage **patients to actively participate** in shaping the healthcare solutions they want and need?*

Potential Implications

- Better connecting medical communities to outsource and share research and ideas

- Gamifying adherence and accountability to treatment

- Building location or condition-based support networks for patients and caregivers

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Trend 08
Market Indicators

400%
Potential **increase in website conversion** rate with better UX[22]

32
Days of **employee productivity wasted** per year navigating enterprise communication apps[23]

68%
Of workers switch between **10 different apps every hour** at work[24]

Source: 22. Forrester Research 23. RingCentral 24. Ring Central

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Trend 08

The UX Imperative

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Flexport's Global Trade OS

Shopify's Empowering eCommerce

*How might we redesign HCP and patient interfaces to create user experiences people **love to actively engage with**?*

Potential Implications

- Creating integrations for digital apps/services to augment operations e.g. Slack, Typeform, Asana

- Redesigning digital patient touchpoints to align with user experience expectations

- Consideration for hiring digital talent to build and maintain interfaces

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Trend 09
Market Indicators

86%
Of consumers say that personalized experiences **affect what they purchase**.[25]

57%
Of consumers are **willing to share personal data** in order to receive personalized offers[26]

44%
Of Gen Z would stop visiting a website if it **did not anticipate** what they needed, liked, or wanted.[27]

Source: 25. Epsilon 26. Sales Force 27. The Center for Generational Kinetics

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Trend 09

Proactive
Personalization

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Nike's Localized Retail Strategy

09 Proactive Personalization
Thought Starters

How might we leverage technology and data to **curate and deliver individualized solutions** *at scale?*

Potential Implications

- Forging relationships with out-of-sector partners e.g. beauty, tech, food and nutrition

- Customizing care experiences based on individual patient preferences and characteristics

- Automating recommendations, reminders, and adjustments to treatment plans based on individual data

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Trend 10
Market Indicators

26k

the number of **coworking spaces expected** in the US by 2022[28]

2025

the year remote working will **rival fixed office locations**[29]

73%

of Millennials are more likely to visit a shopping center if it has a **leisure or entertainment experience**[30]

Source: 28. Coworking Resources 29. Blue Face 30. FBIC Group

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Trend 10

Blended Spaces

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WeWork's Expansion

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Amazon Go's Modular Spaces

10 Blended Spaces
Thought Starters

*How might we design care delivery to be deeply **integrated into everyday lives**?*

Potential Implications

- Aligning hospitality offerings with current consumer expectations e.g. healthy fast casual food

- Integrating healthcare offerings into existing community spaces e.g. office parks, malls

- Creating multi-specialty treatment facilities for whole patient health

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Outside-In Trends Summary

01.
Data with Discipline

02.
Micro-Moments of Truth

03.
Democratizing Wellness

04.
Vocal Velocity

05.
Taking on Taboos

06.
Conspicuous Conservation
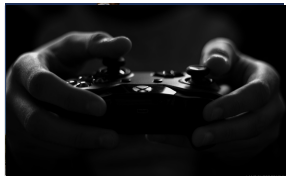
07.
Creator Communities

08.
The UX Imperative

09.
Proactive Personalization

10.
Blended Spaces

Fahrenheit

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Three Key Takeaways

1. **If you're feeling stuck inside, look outside for inspiration**

2. **Challenge established paradigms**

3. **Innovation involves skills that can be learned and honed**

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Our Team

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