Future of Health(care) – Silver Linings Playbook Edition

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@ZaynaKhayat @SEHC_SEHealth #VCAHSPR2020
Drivers of the future of health

Central paradigm: The system

New paradigm: The Citizen

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The Future of Health(care)

**Today: System**

**TIMING**  Reactive, sick care

**PRECISION**  1 size fits all, crude, analog

**MODALITY**  Institution-centred

**DURATION**  Episodic, intermittent, silo’d

**POWER**  Provider

**CURRENCY**  Volume, inputs, costs, fee-for-service

**Future: Citizen**

**TIMING**  Proactive, predictive

**PRECISION**  Personalized, intelligent

**MODALITY**  Omnichannel

**DURATION**  Continuous | team

**POWER**  People-powered

**CURRENCY**  Results, fee-for-health

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Drivers – COVID edition

Central paradigm: The system

New paradigm: The Person

- Shift in behaviours due to risk of personal contact
- Shifts in demand curves (vents, PPE, staff, policies)
- Demand for low-touch alternatives – how we work AND deliver care
- Existing data, tools, equipment, tests, therapies insufficient

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Now
• (Continue) to react– design solutions with intention for the future

Near
• Shock-proofing – next wave, community spread, delayed care, mental health, new patient & family behaviours & patterns
• Infrastructure – hiring, training, digital, PPE

Far
• Longterm Elder care system 2.0
Comus - John Milton (1634)

“I see ye visibly, and now believe
That he, the Supreme Good, to whom all things ill
Are but as slavish officers of vengeance,
Would send a glistening guardian, if need were
To keep my life and honour unassailed.
Was I deceived, or did a sable cloud
Turn forth her silver lining on the night?
I did not err; there does a sable cloud
Turn forth her silver lining on the night,
And casts a gleam over this tufted grove.”
Black Plague
[14th c. Europe]
~25M (1/3 of EU)
Power shift to scarce labor resources
Credited with ending feudalism & serfdom

World War II
Women participation in workforce
Government role i.e. spending >>40% GDP
Products: Jet engine, pressurized aircraft cabin, helicopter, atomic tech, radar, synthetic rubber, computers, rocketry, penicillin, internet

9/11
Reshaped security & transportation policies (worldwide)
Shift in attitudes re: trade-off between personal privacy & security
NYC rebased economy across 5 burrows

2003 SARS [China]
Changed attitudes toward shopping/consumption
e-commerce channels opened and stayed – paved the way for rise of Alibaba & other digital giants

Financial Crisis
Gave rise to service marketplaces (AirBNB)
Gave rise to freelance / independent gig worker marketplaces (Task Rabbit, Uber, Lyft)
Rapid fiscal policy making

Source: BCG, McKinsey and web research; Images: Sailor - Victor Jorgensen, United States Navy/Associated Press; Ballet - Vincent Yu/AP
Healthcare innovations are the most high demand concept in the world right now.

Dr. Ismail Sayeed, VIOS

Future: Citizen

Today: System

1. Mindsets
2. Entrenched producer interests
3. Politics
4. Governance/structures
5. Silos at many levels
6. Outdated regulations/policies
7. Financing & incentives
8. Data flow, infostructure
9. Adoption pathways [or lack thereof]
10. Capacity for innovation

Barriers to innovation are SMASHED
More health innovation in 10 days than 10 years

**Healthcare** care model, product, experience, & business model innovations

1. **Digital channels:** fee codes make it allowed [or free access] – GPs / mental health / home care
2. **Health workers:** Cross-licensing, out of retirement, med students in field, sharing staff, upskilling (e.g. flight attendants)
3. **Data & research:** real-time generation & analysis, nouveau transparency, data liquidity; research grant $ in days
4. **Hospital capacity:** field or overflow hospitals in conference centres, arenas, hotels … in days; low value dropped
5. **Testing:** drive through testing, kiosks; results from days/labs → hours → minutes/point of care; self test; real time data
6. **Reimbursement coverage:** virtual care, non-insured, non-documented, out of system
7. **Regulation fast-tracked:** FDA, Health Canada, payers – tests, PPE, vaccine trials, vents, reimbursement, etc.
8. **Policy:** Public health policy innovation in hours; economic policy innovations in hours and days

**Product and service pivots in non healthcare industries**

- **Social innovation:** libraries become food banks, volunteer drives, delivery services to seniors, relief funds ....
- **Civilians, infographic artists, other data interrogators** – aggregating data, finding meaning better/faster than experts
- Tech giants & startups: **contact tracing apps & tools**
- Dyson, Tesla, Ford, etc: **ventilators**
- Apparel brands [H&M, Vutton, Burberry, Haynes, Bauer, Gap, Can. Goose], 3D printers - **masks, gowns, face shields**
- Brewers, distilleries, marijuana companies: **Hand Sanitizer**
- **Financial services:** ATM that disinfects cash; help fixed income smooth cash flow challenges
- **Essential workers & elderly:** Free tech & wifi; early open times, queues at banks/grocery; free food & other perks

**Solidarity** – intergenerational; inter-organizational; inter-provincial; **inter-sectorial**; fed-prov?; international ...

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Women's participation in workforce
Product innovation

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Pandemic Economy

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"rather than [the capital markets] operating as an independent sphere, we are seeing that the value of everything, the entire $80 trillion global economy, is linked to healthcare" – John G Singer
KEEP CALM & KEEP FUTURE PROOFING

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