IDC Health Insights

Key Healthcare Trends for 2021 and Beyond

Thriving in the Aftermath of COVID-19

IDC

The purpose of healthcare is maximizing value for patients

Maximizing value in healthcare means delivering integrated personalized services, dynamically adjusted to the evolving needs of target populations.

Value can be described as OUTCOMES that a patient EXPERIENCES. In other words, results matter more than the extent of activity. This means that to increase patient VALUE, healthcare systems must provide better quality care in a more efficient way.

41% of EU healthcare providers are using technology to obtain actionable insights about patients and operations.

Source: IDC EMEA, Future Enterprise Resilience 2021, February 2021
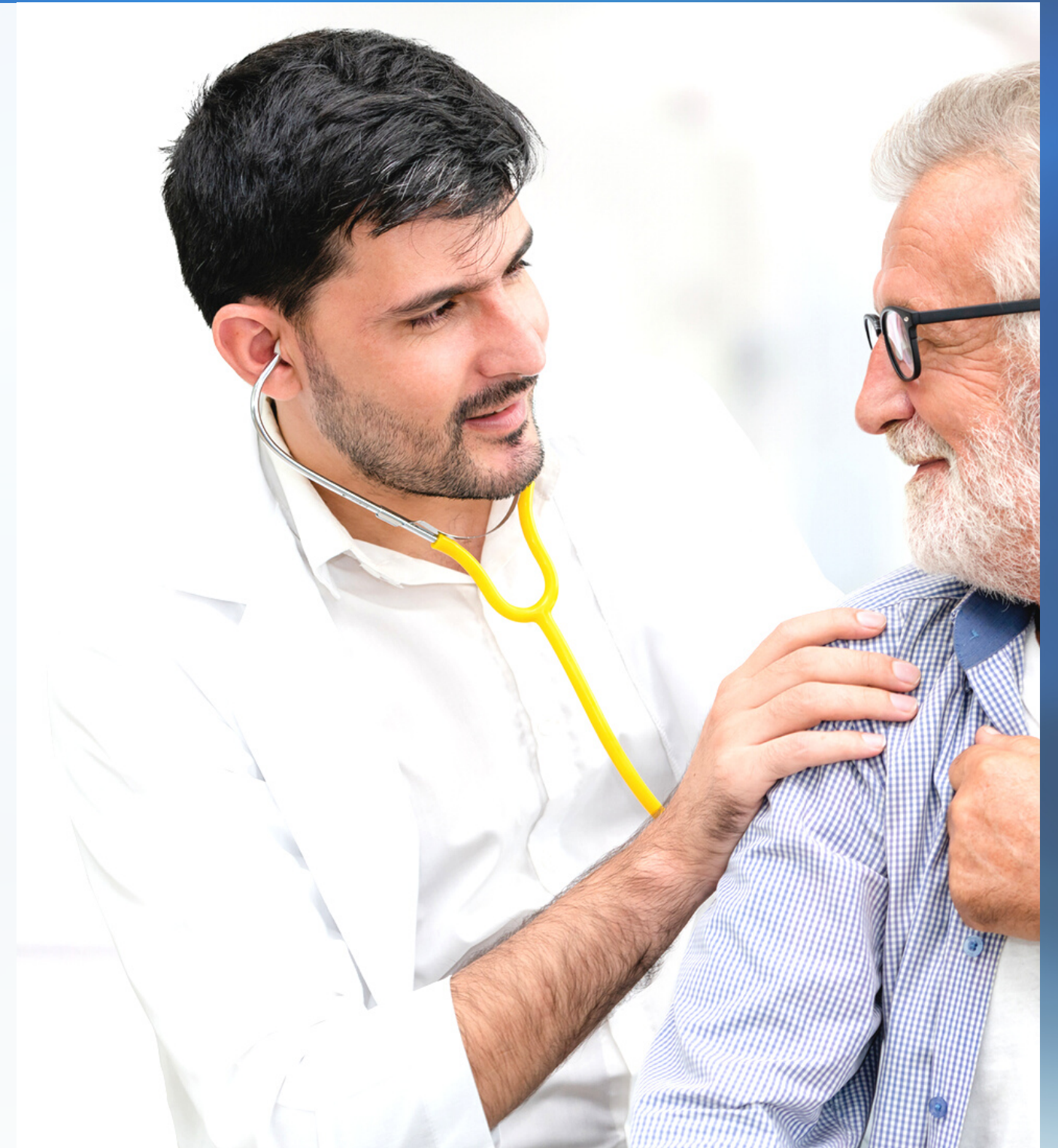
Focusing on better coordination of the patient journey

Which organizations are best dealing with the COVID-19 pandemic?
Those that are at the forefront of identifying ways to leverage digital solutions to streamline operations and improve patients' outcomes, and investing in technologies to enable:

Data liquidity

to access, ingest, and manipulate standardized data sets

Data analysis

to identify and discover the information beyond a data set

Data integration

to increase the quality of information

Healthcare trends and drivers

1. COVID-19 has accelerated new ways for patients to access care services. Healthcare organizations are deploying technologies at scale to support new business models and transform the way patients interact with and experience every touchpoint of their journey.

2. To support this effort and enable an innovative operating model, healthcare organizations will need to rely on a secure, scalable, and highly available digital infrastructure that will enable virtual care and workforce collaboration.

3. These investments are the starting point to optimize the workflow and improve the overall operational efficiency of the organization by automating repetitive tasks and enabling clinicians to fully dedicate themselves to patients.

PATIENT HEALTHCARE EXPERIENCE > **IT INFRASTRUCTURE MODERNIZATION** > **WORKFLOW OPTIMIZATION**
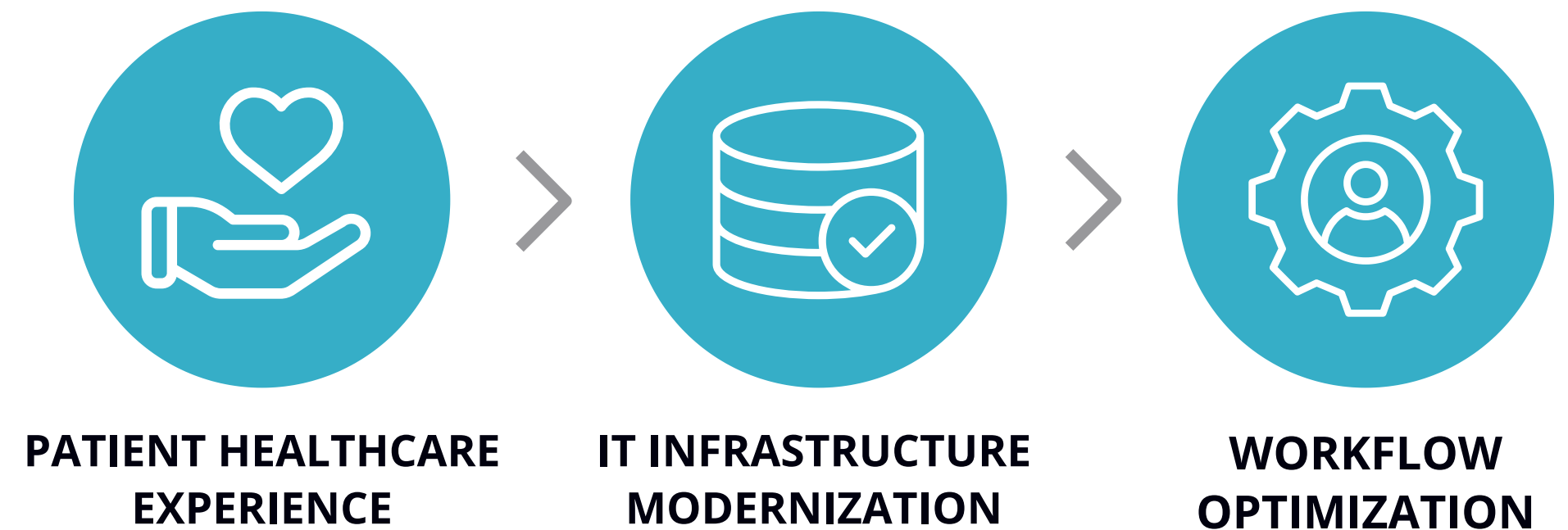
Patient healthcare experience

The scale of "digital front door" deployment will correlate to improved patient health experiences

To realize concrete value for patients, digital technologies should be able to integrate data and enable care across the various touchpoints of the patient journey in a seamless, context-relevant, and user-oriented way.

This is why IDC Health Insights uses the term "digital front door" to describe all the touchpoints of digital interaction. The concept goes well beyond merely enabling a patient portal — and brings about what is needed to scale service capacity beyond the physical walls of providers.

And the bigger the scale, the better for patients' health experiences and value.

In the past 12 months, healthcare providers have had to turn to virtual care and digital patient experiences to support business continuity and essential patient care.

Accelerating the digital front door

+51%

spending on **mobile apps**

+50%

spending on **patient service and support platforms**

+39%

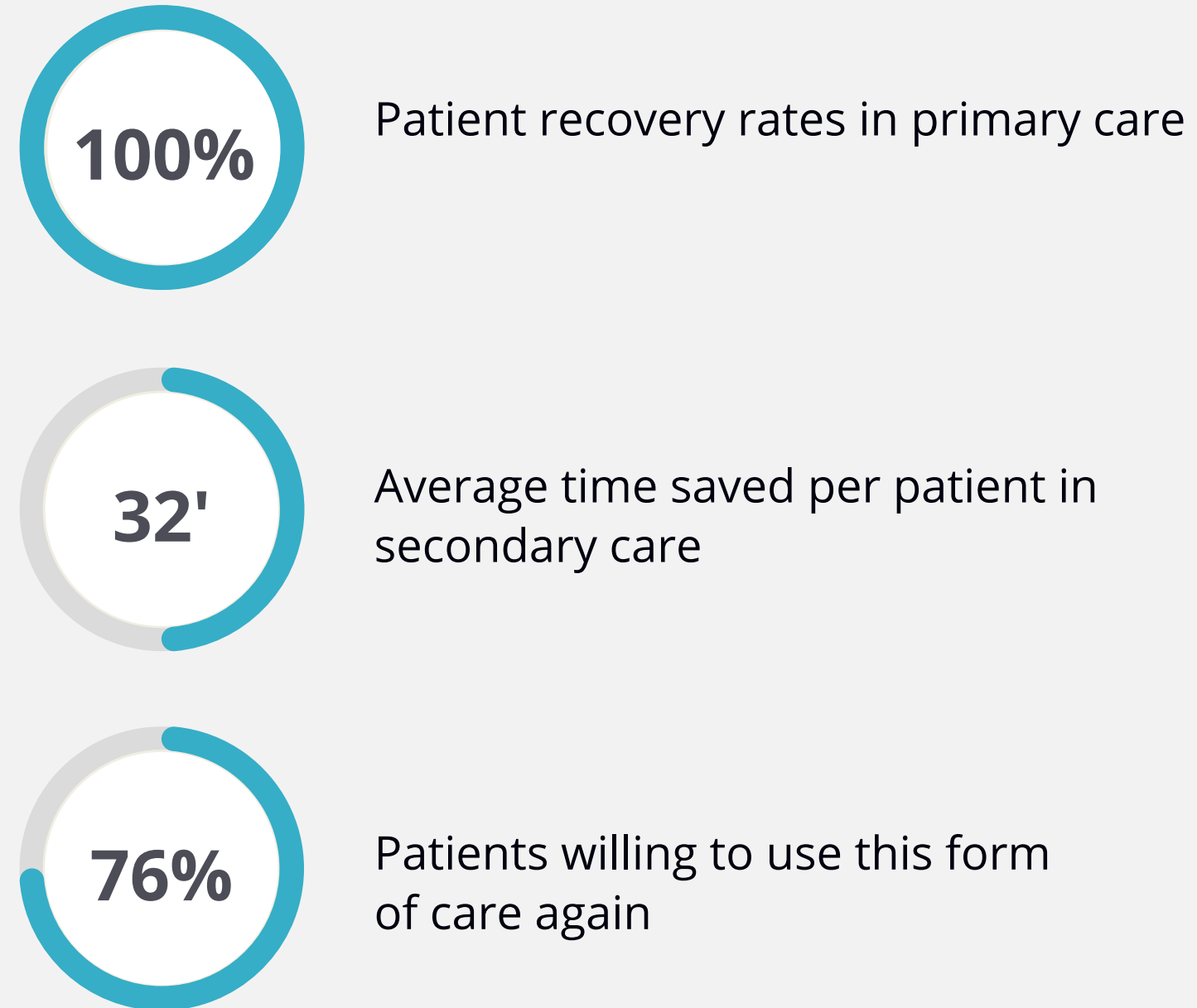spending on **artificial intelligence and machine learning**

Source: IDC EMEA, Future Enterprise Resilience 2021, February 2021

By 2023, **65%** of patients will have accessed care through a **digital front door** as healthcare providers look for better ways to improve access, engagement, and experiences across all services.
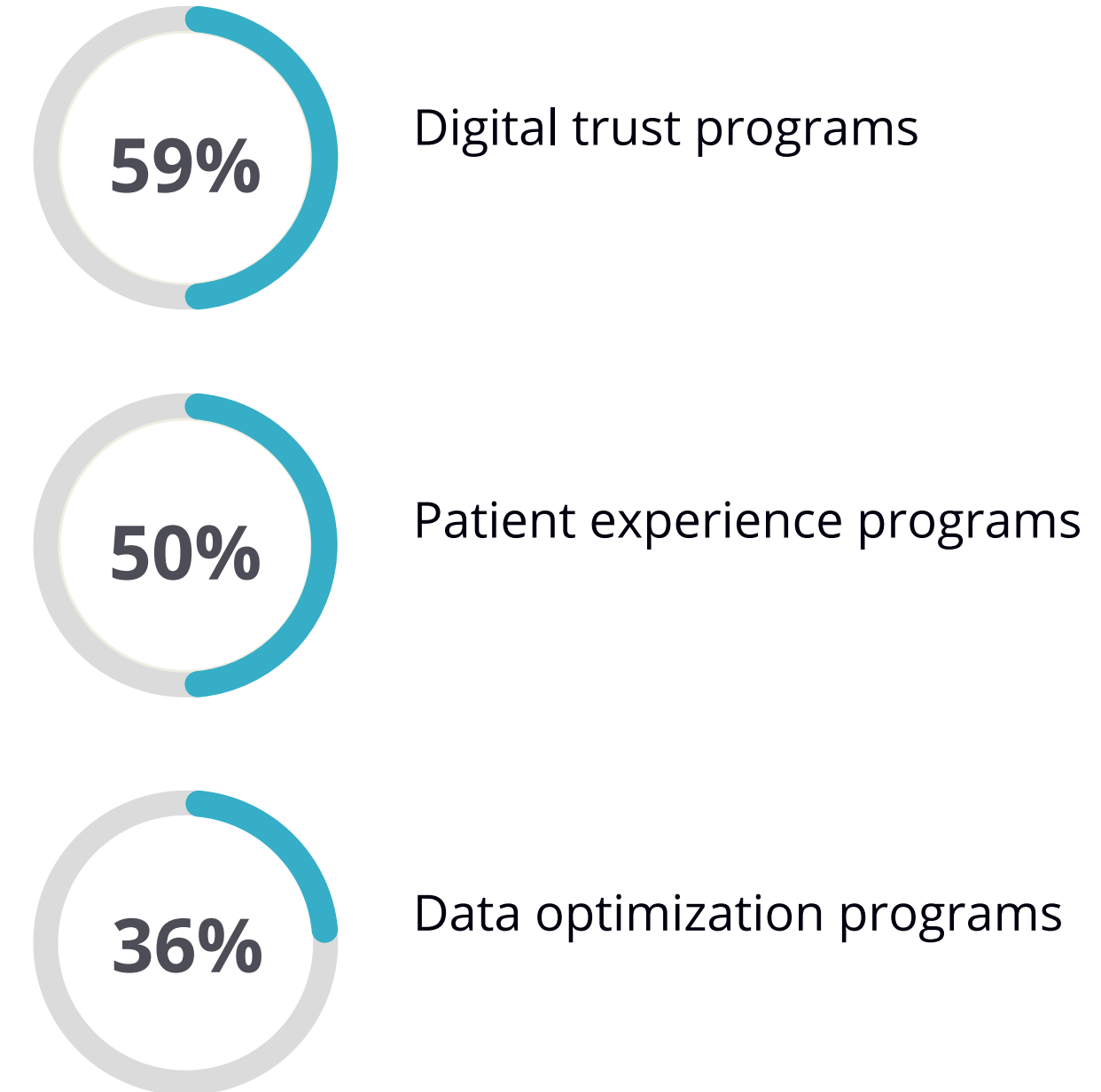
IDC

Remote patient monitoring

100%   Patient recovery rates in primary care

32'   Average time saved per patient in secondary care

76%   Patients willing to use this form of care again

Source: NHSX UK — Huma: Medopad, evaluation of the remote digital care platform

Healthcare organizations' technology priorities

59%   Digital trust programs

50%   Patient experience programs

36%   Data optimization programs

Source: IDC EMEA, Future Enterprise Resilience 2021, February 2021

IDC

IT infrastructure modernization

A secure, scalable, and highly available digital infrastructure is a priority for healthcare IT executives

Legacy infrastructures and applications can't support properly innovative tools such as AI-enabled systems or new models such as integrated and virtual care as they are not flexible, scalable, or secure enough.

Healthcare executives are realizing that the ICT infrastructure **must support agility**, recognizing a changing technology landscape and current/future application requirements where the **consumption model** may change dramatically in terms of **where data is accessed**, how it is presented, and on which devices it will be **consumed**.

Digital infrastructure resilience

Cloud

Converged and container infrastructure

Autonomous IT operations

≋IDC

38% of EU healthcare providers consider investments in digital infrastructure a **priority to ensure long-term resilience.**

A new approach to infrastructure to support innovative operative models

23%

Virtual care
Increase in spending in virtual care applications in 2021

Source: IDC EMEA, COVID-19 Impact Survey, December 2020

30%

Workforce collaboration
EU healthcare providers introduced modern collaboration tools

*Source: IDC EMEA, Future of Work 2020, March 2020*

Workflow modernization

IDC

Workflow modernization is a top priority to improve operational efficiency in healthcare organizations

In the future, healthcare providers must optimize, automate, and redesign new clinical processes and management systems.
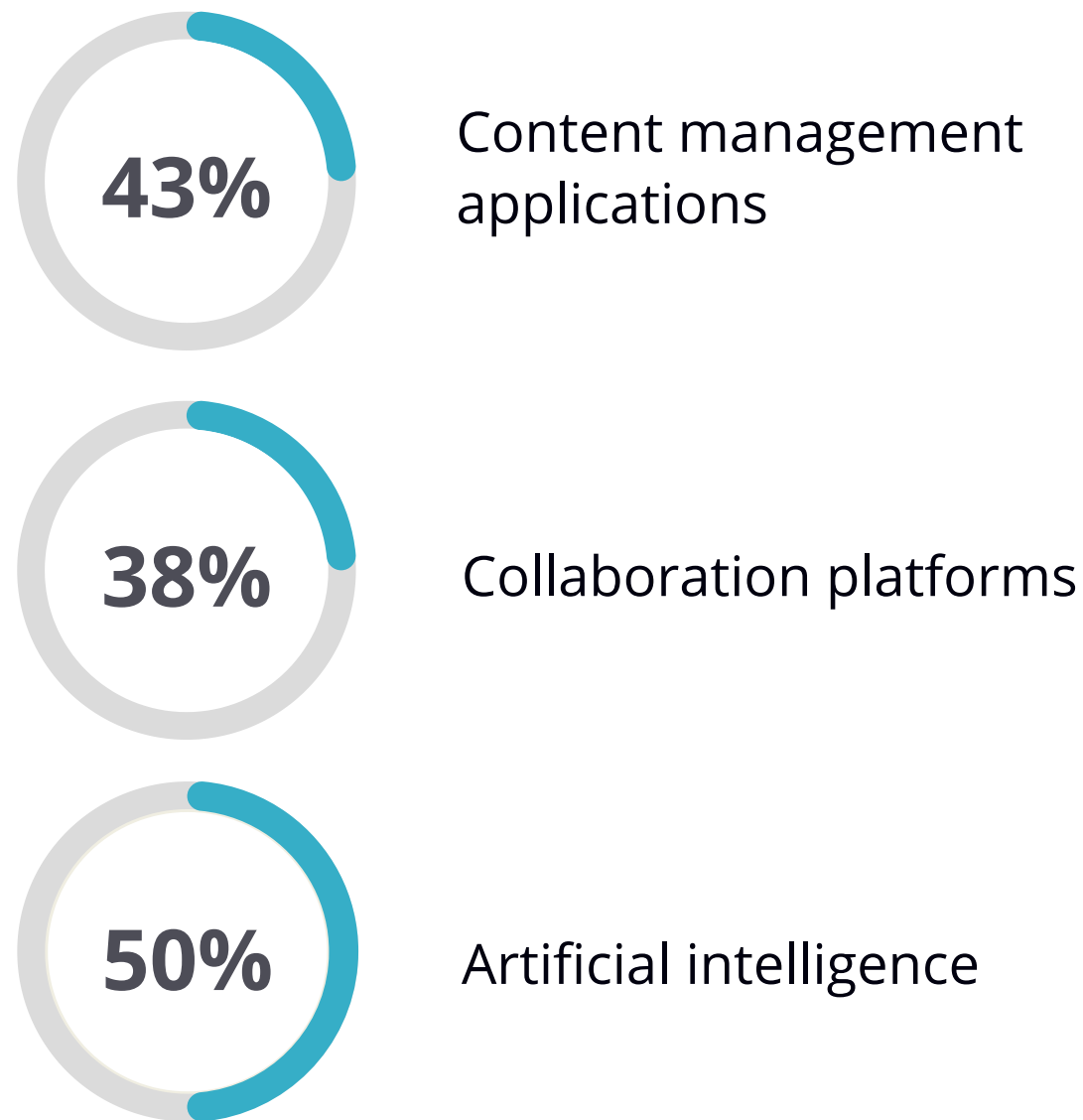
To leverage newly designed intelligent workflows, healthcare providers need to **invest in advanced analytics tools** that accelerate the shift from being data rich to being data driven to create new experiences for their patients, workforce, and partners across the ecosystem.

IDC
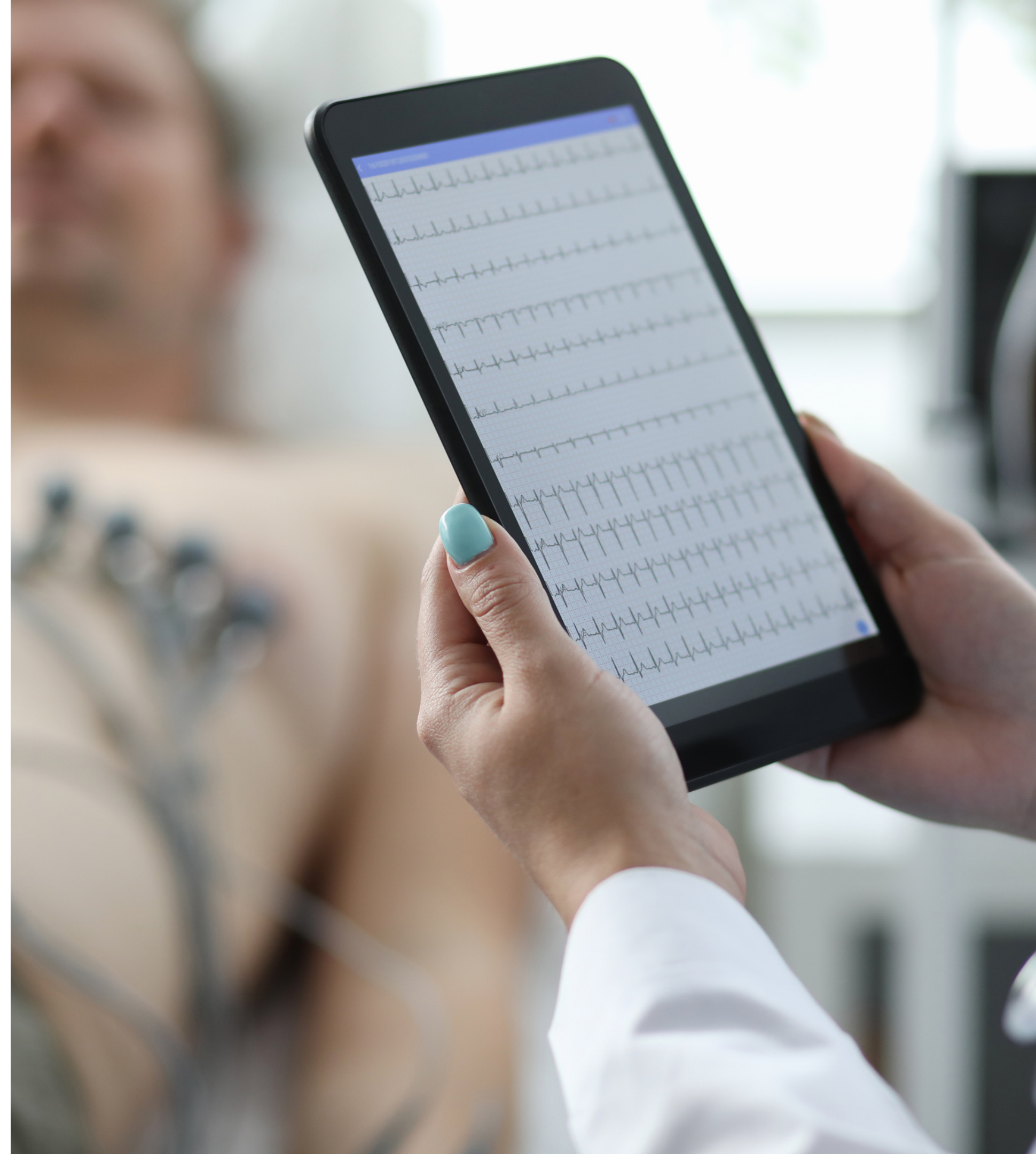
From data rich to data driven to streamline operations

Compared with 2020 (after COVID adjustments), spending on the following IT products and services will increase in 2021 by...

43%   Content management applications

38%   Collaboration platforms

50%   Artificial intelligence

Automation of repetitive tasks and workflows can create greater VALUE for patients

50%

EU healthcare organizations see technologies automating business tasks as an opportunity to enable **employees to focus on higher-value tasks.**

IDC

Key guidance

PATIENT HEALTH EXPERIENCE

A digital front door strategy that accelerates and establishes new long-term digitally enabled care delivery models supporting all touchpoints in the patient journey

DIGITAL INFRASTRUCTURE REIMAGINED

A modern network infrastructure creates the agility to reengineer how care is delivered across the healthcare ecosystem

WORKFLOW OPTIMIZATION

A future of work scenario for healthcare organizations means the technology must deliver actionable advice to deliver better quality care

IDC EMEA, Future Enterprise Resilience 2021, February 2021

IDC

Adriana Allocato

Research Manager
IDC Health Insights
aallocato@idc.com

Giulia Besana

Research Analyst
IDC Health Insights
gbesana@idc.com

Nino Giguashvili

Senior Research Analyst
IDC Health Insights
ngiguashvili@idc.com

Silvia Piai

Research Director
IDC Health Insights
spiai@idc.com