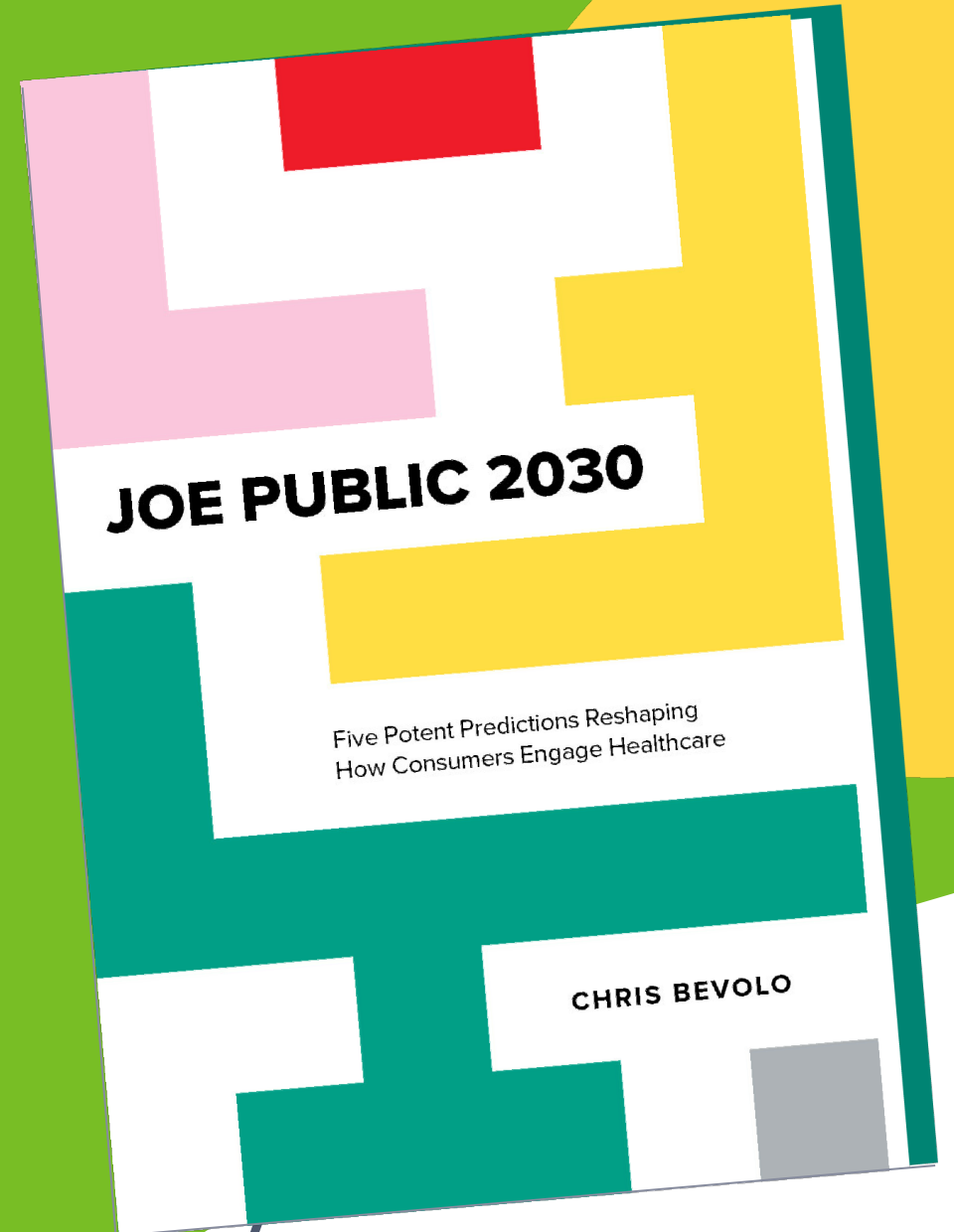
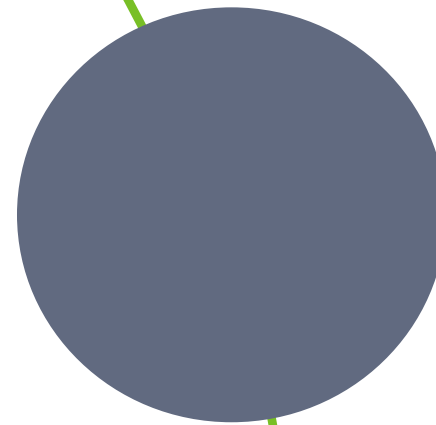


# Joe Public 2030

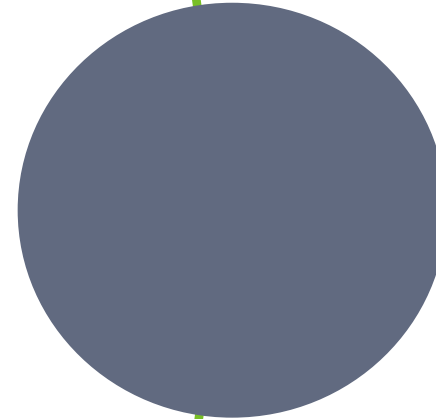
Five Potent Predictions Reshaping  
How Consumers Engage Healthcare  
In the Coming Decade



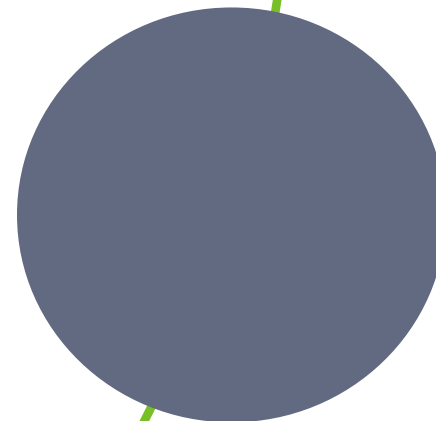
# A Journey to the Future



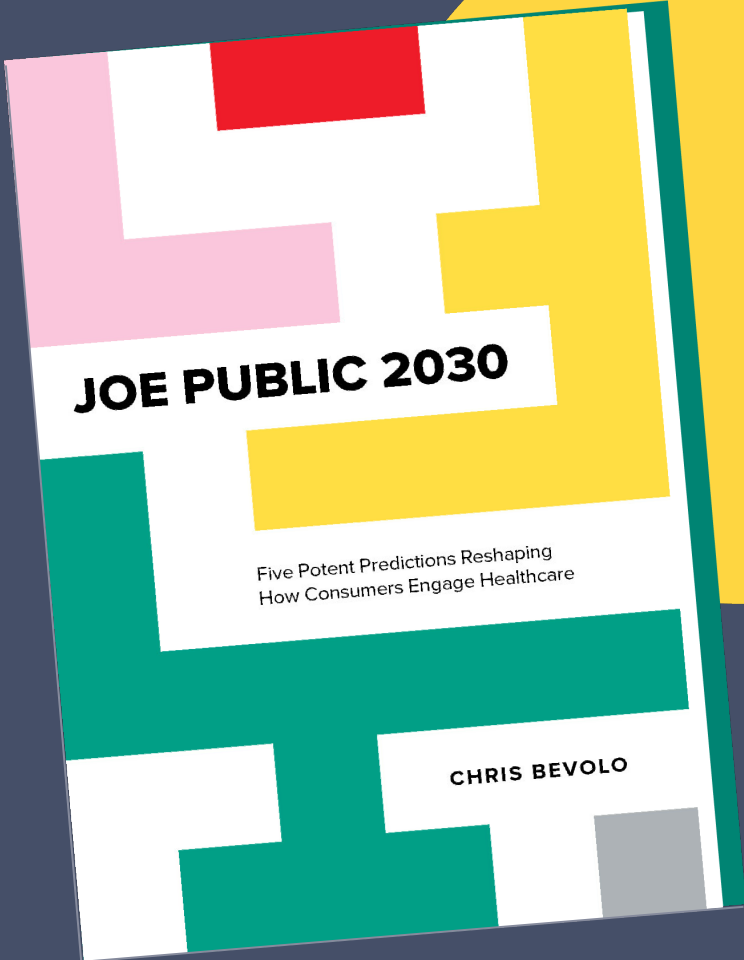
“Joe Public 2030”  
overview



The predictions



Q&A



## The background

- Between industry transformation, social justice movement, and COVID-19—*so much change!*
- BPD’s “Team 2030”—top healthcare strategists and futurists: *What will the next decade hold?*
- More than 260 resource citations
- Interviews with two dozen healthcare executives, experts, and leaders



# Industry input

Bon Secours Mercy Health  
Cincinnati Children's  
Cleveland Clinic  
Duke Health  
Geisinger  
Henry Ford Healthcare  
Intermountain Healthcare  
Johns Hopkins Medicine  
Mayo Clinic

Bain Capital  
Bright Health  
CVS Health  
DXTRA  
Optum  
Sesame Health

# Seismic Shifts in the Provider Space

New Entrants  
playing at the top  
of the funnel

Staffing  
shortages  
abound

Access  
challenges  
persist

Rural hospital  
closures continue

Decline in  
patient health

Challenging  
financial stressors  
for health systems

Mergers &  
acquisitions  
heat up

AI, AI everywhere

# The Five Predictions



1. The Copernican Consumer
2. Constricted Consumerism
3. Disparity Dystopia
4. The Rise of Health Sects
5. The Funnel Wars

1

# The Copernican Consumer





## PREDICTION ONE



AI  
Blockchain  
Wearables  
Monitors  
Digital therapeutics  
Precision medicine  
Home health  
Retail health  
Virtual health  
Self-service  
Role of physicians

# The Copernican Consumer

*“This consumes a lot of our oxygen at Geisinger – it’s at the forefront of everything we do.”*

*– Dr. Ryu, CEO & President, Geisinger*

## PREDICTION ONE



AI  
Blockchain  
Wearables  
Monitors  
Digital therapeutics  
Precision medicine  
Home health  
Retail health  
Virtual health  
Self-service  
Role of physicians

# The Copernican Consumer

Truly personalized, consumer-centric healthcare

Dispersion of care

Block-chain enabled holistic health view

New AI-driven “Betterment” platforms  
for personal health management

The “Barbell Effect” on clinicians

2

# Constricted Consumerism



## PREDICTION TWO



Employers  
Private payors  
Public payor  
Vertical integration  
Narrow networks  
Tiering  
Steering  
Consolidation  
Choice

# Constricted Consumerism

*“It’s been 20 years plus since we first started talking about the power of consumerism—and guess what—it ain’t gonna happen.”*

*– Wendell Potter, President, Center for Health and Democracy*

## PREDICTION TWO



Employers  
Private payors  
Public payor  
Vertical integration  
Narrow networks  
Tiering  
Steering  
Consolidation  
Choice

# Constricted Consumerism

Two decades of waiting for consumerism's true impact

Continued role of employers and payors as ultimate "customer"

Consumers will be further funneled and restricted by payors

Consumers will be further funneled and restricted by providers

Consumers will continue to struggle to act as... consumers

3

# Disparity Dystopia





## PREDICTION THREE



Haves v. Have Nots  
Historical gap  
Covid-19 impact  
Aging of America  
Affordability  
Technology gap  
Climate change  
Culture

# Disparity Dystopia

“Healthcare is to a large extent a cultural notion.”

— Marco Bevolo  
*International futurist, designer, lecturer, and researcher*

## PREDICTION THREE



Haves v. Have Nots  
Historical gap  
Covid-19 impact  
Aging of America  
Affordability  
Technology gap  
Climate change  
Culture

# Disparity Dystopia

**Long history of health inequities and disparities worsened by Covid-19**

**The haves – the healthy getting healthier**

**The have-nots – losing even more ground**

**Good news – legacy providers, payors, and other organizations recognize the clinical and financial benefit of addressing disparities**

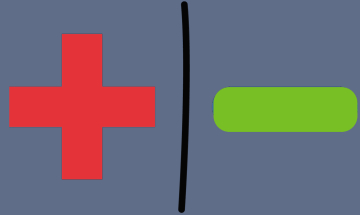
**Bad news – political outlook isn't favorable for largest player – federal government – or society overall**

4

# The Rise of Health Sects



## PREDICTION FOUR



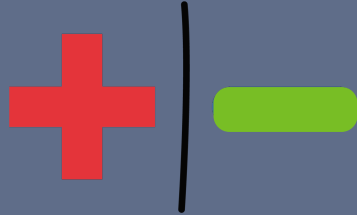
Politicalization  
Tribalism  
Social media  
Personal data  
Distrust of experts  
Anti-science  
Influencers  
Individualism  
Consumerism  
CSR

# Rise of Health Sects

*“If we can’t retain a shared set of values and principles, then truth becomes whatever one decides it should be.”*

— Kristen Wevers  
Former CMO, UC Health

## PREDICTION FOUR



Politicalization  
Tribalism  
Social media  
Personal data  
Distrust of experts  
Anti-science  
Influencers  
Individualism  
Consumerism  
CSR

# Rise of Health Sects

Politicization of health is not new, but Covid-19 and current environment have accelerated

Number one indicator of Covid-19 vaccination is political affiliation

Societal and technology trends are fueling the fire

How long until we see politically motivated clinics and hospitals?

Health brands are between a rock and a hard place

5

# The Funnel Wars





# The Acuity Funnel

Health & Wellness Content

Nutrition Counseling

Weight Management

Wellness Guidance

Mental Health Services

Immunizations

Health Risk Assessments

Health & Wellness

Initial Care

Specialty Care

Surgical Care

Tertiary Care

Quaternary Care

Virtual Care

Retail Health

Urgent Care

ED

Primary Care

# The top of the funnel drives service lines

Primary Care, Urgent Care, ED, Etc.

**83%**

of inpatient, service-line encounters had a low-acuity visit in the last 12 months

Service-line Encounters

**only 17%**

came in some other way

# The fortune five eye(d) healthcare



# VC money pours in...

❖ one medical

// FORWARD

 VillageMD®

 Aledade

bpd

 Oak St.  
Health

 iorahealth

 crossover

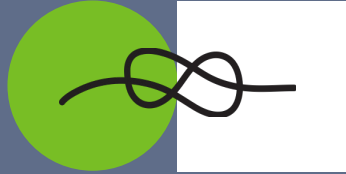
 ChenMed

wild health.

 PRIVIA™  
HEALTH

 nice

## PREDICTION FIVE



Top of the funnel  
New entrants  
Tech giants  
Retail giants  
Payors as providers  
VC/PE money  
Local/national scale  
Integrated systems  
Innovator's dilemma



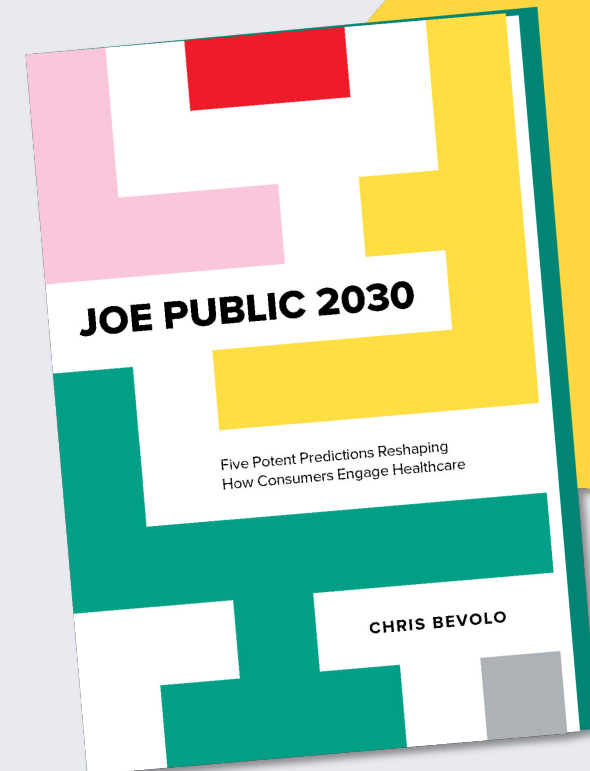
In the race to truly own the ultimate consumer relationship, those who have to gain knowledge will get there faster than those who have to change culture.

**Russ Meyer, CVS Health**  
**Executive Director Brand Strategy & Innovation**



“The likelihood of this division is 100%. There isn’t enough business or brand space at the top of the funnel for everyone. So, some providers will cease being true consumer brands and will move from out in front of the wall to behind it.”

*Russ Meyer, CVS Health  
Executive Director Brand Strategy & Innovation*



# Walmart will close all of its health care clinics

By Nathaniel Meyersohn, CNN  
3 minute read · Updated 9:42 AM EDT, Tue April 30, 2024



A Walmart Health Center in Springdale, Arkansas. Walmart

**New York (CNN)** — Walmart, the largest retailer in the United States, will close all 51 of its health care centers in six states and end virtual health care services, the company said Tuesday.

Global Edition | telehealth

# Optum Virtual Care said to be closing down

Optum leaders reportedly shared internally that the company would shutter its sizable telehealth business. Parent company UnitedHealth Group said to offer telemedicine and remote care

By Andrea Fox | April 26, 2024 | 11:30 AM



On an April 18 conference call with Optum Everycare employees of the company's virtual care division to be in July, according to a news report this week.

PROVIDERS

# Amazon cuts hundreds of jobs in One Medical, Pharmacy units

By Heather Landi · Feb 7, 2024 7:00am

Amazon job cuts layoffs Digital Health

# Walgreens Shuttters 160 VillageMD Clinics after \$6 Billion Loss

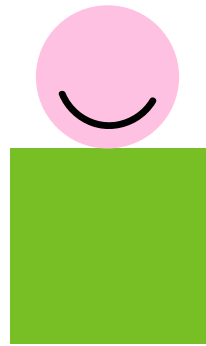
Data & Insights / AHA Center for Health Innovation Market Scan



Walgreens Boots Alliance reported last week that it lost nearly \$6 billion in its second quarter as the company struggles with the loss in value of its investment in VillageMD. Walgreens paid more than \$5 billion to acquire a controlling stake in the primary care network in 2021. The company posted a steep loss in share price following the release of its earnings report.

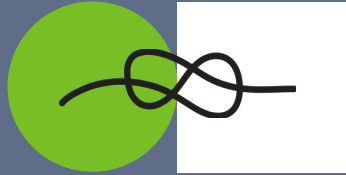


PREDICTION FIVE  
The Funnel Wars



# The Prize: Owning the Patient Relationship

## PREDICTION FIVE



Top of the funnel  
New entrants  
Tech giants  
Retail giants  
Payors as providers  
VC/PE money  
Local/national scale  
Integrated systems  
Innovator's dilemma

# The Funnel Wars

**Legacy health systems no longer just compared to consumer brands, they're now competing with them**

**Billions in VC/PE money pouring into space**

**Payors now direct competitors**

**Other than few large integrated systems, many legacy providers face losing patient relationship and becoming "downstream vendors" of care – this will be a market-to-market battle**

**New entrants have the upper hand – culture vs. knowledge**

# The Five Predictions



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## How to leverage these predictions?

- Start a conversation
- Consider the impact on your area of expertise and market
- Track the progress of the predictions
- Join the Joe Public 2030 LinkedIn community

To learn more, visit [www.JoePublic2030.com](http://www.JoePublic2030.com)

Thank You.