Population Health Colloquium

 The Health System Today, Tomorrow:

 Implications for Population Health
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#### ADMINISTRATORS/WATCHDOGS

### The U.S. Health System Today

Characteristics: Economics 2021: **INNOVATORS** Complex Government Regulators & Agencies Media \$4.3 trillion spending Fragmented (\$12,914/capita) OTC& Biopharma SERVICE PROVIDERS Self-Care Social Highly regulated Services 2.6% increase vs. 10.2% in '20 LTC Retail Professional Societies/ Labor intense Insurers 19 million direct Special Interests Consumers Alternative **Physicians** employment Health Capital intense (Public & Private) Outpatient 18.3% of GDP vs.19.7% Infomediaries **Big Tech** Hospitals Facilities In '20, 17.6% in '19 NFP, Public & Accrediting &, Licensing Employers Investor Ownership\* 5.4% CAGR thru '28 (CMS) NGOs Devices **Disruptors** & **Private Capital** 

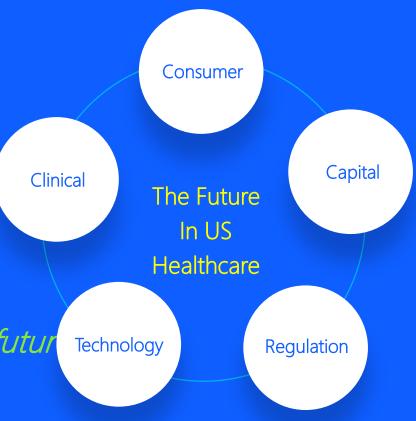
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Discontent, frustration, distrust accelerating

# Health System changes originate in 5 Zones: *Population health is impacted*

- *Clinical: specialty drugs, clinical AI, self-diagnostics*
- Technology: better, faster, sometimes cheaper
- *Regulatory: Federal vs. state actions; disparities*
- Capital: more private, less public
- Consumer: affordability, user experiences
- problematic

Changes in each are asynchronous. Lag indicators are decreasingly predictive of the futur Affordability, funding key challenges. Elections, court challenges, employer catalysts



Key questions for Population Health Leaders:

Consideration: what is the destination of is the system in 8-10 years? a repeat of its recent past or something very different? Then...

Which populations?

What are the most effective processes and tools to optimize results at lowest costs?

Who are committed partners?

How will capital be acquired?



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