

*Population Health Colloquium*

# The Health System Today, Tomorrow: Implications for Population Health



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The Keckley Report

[www.paulkeckley.com](http://www.paulkeckley.com)

# The U.S. Health System Today

## Economics 2021:

\$4.3 trillion spending  
(\$12,914/capita)

2.6% increase vs. 10.2% in '20

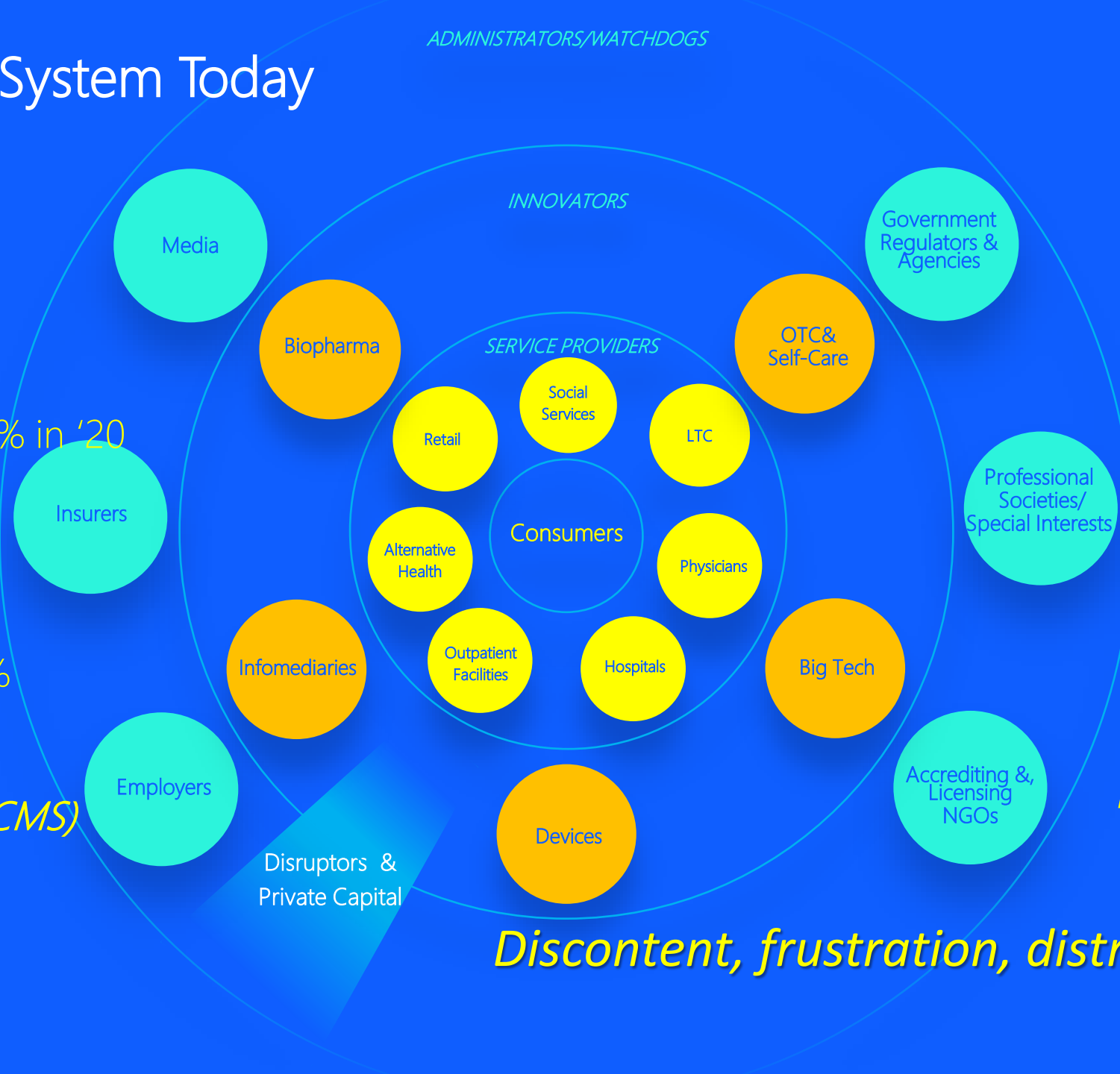
19 million direct  
employment

18.3% of GDP vs. 19.7%  
In '20, 17.6% in '19

5.4% CAGR thru '28 (CMS)



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## Characteristics:

Complex

Fragmented

Highly regulated

Labor intense

Capital intense  
(Public & Private)

NFP, Public &  
Investor Ownership\*

*Discontent, frustration, distrust accelerating*

# Health System changes originate in 5 Zones:

## *Population health is impacted*

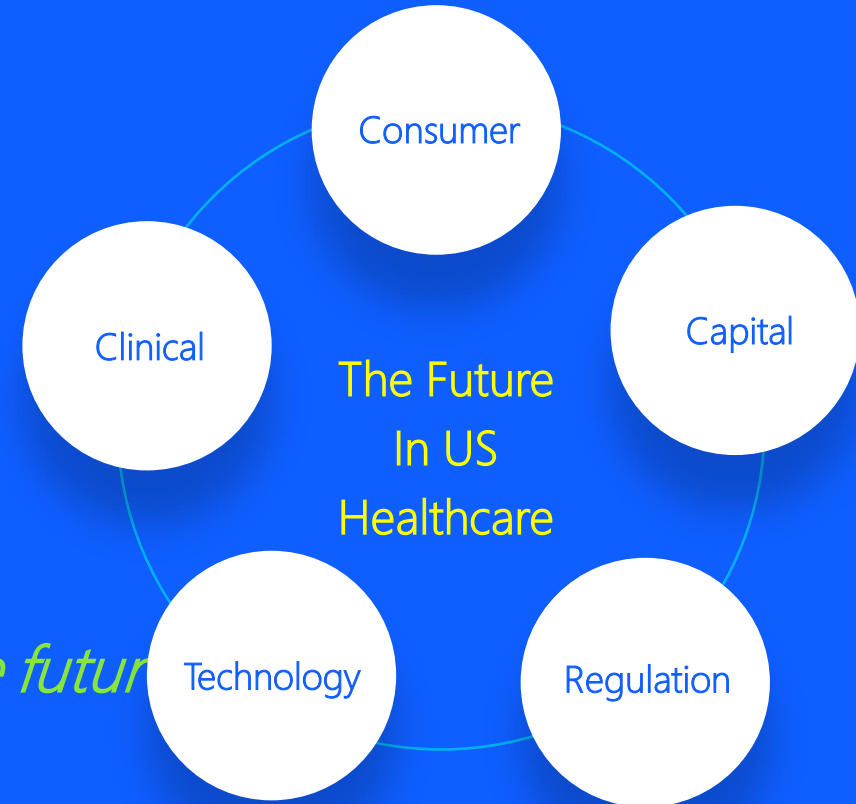
- *Clinical: specialty drugs, clinical AI, self-diagnostics*
- *Technology: better, faster, sometimes cheaper*
- *Regulatory: Federal vs. state actions; disparities*
- *Capital: more private, less public*
- *Consumer: affordability, user experiences*
- *problematic*

*Changes in each are asynchronous.*

*Lag indicators are decreasingly predictive of the future*

*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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