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ECOSYSTEM PREDICTS

# The Top 5 Trends for Healthcare in 2022

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# The Drivers Of Ongoing Transformation in Healthcare



## Amit Rana

Principal Advisor,  
Healthcare, Innovation and  
Entrepreneurship, Healthtech



## Krish G. Krishnan

Principal Advisor,  
Biotech & Life Science



## Sash Mukherjee

Principal Analyst,  
Government & Healthcare



### PATIENTS

Improved self-knowledge  
and ownership of personal  
health outcomes and data



### TECHNOLOGY

Widespread availability and  
adoption of digital and  
cognitive technologies



### EMPLOYEES

The ongoing challenges  
of clinical and  
administrative staff



### LIFE SCIENCES

The recent investments  
in, and success of the  
sector



### POLICY MAKERS

The sharp increase in  
focus on population  
health



### UNCERTAINTY

Around challenges such as new  
virus strains, anti-vaccine protests,  
supply chain disruptions etc.



# Looking Back – Before Looking Ahead

The Healthcare industry has achieved much in the last two years. Before we look ahead to 2022 and beyond, it would be worthwhile to take a look at where our success stories lie.

<p><b>01</b></p> <p>A couple of hundred knowledge workers (scientists) were able to create an effective and safe vaccine in less than a year.</p>	<p><b>02</b></p> <p>Digital adoption increased at every level – digital health, digital medicine, digital therapeutics. The trend will continue, though the truly consumer experience centric innovations will stick and survive.</p>	<p><b>03</b></p> <p>New platforms of collaboration were seeded and nurtured between healthcare systems, life sciences organisations, technology providers and other stakeholders.</p>	<p><b>04</b></p> <p>Innovations were seen at every level: Boards discussed disruptive technologies; “Innovation is business” was actually practiced; and Management took a collaborative and human-centric approach.</p>	<p><b>05</b></p> <p>Organisations’ crisis management strategies were based on agility and empathy. Executive and Management were better empowered to ensure their organisations survived the crisis.</p>
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In line with the theory of creative destruction, every cycle of damage is followed by new creation – innovation is born out of uncertainty.



**Amit Rana**  
Principal Advisor,  
Healthcare, Innovation and  
Entrepreneurship, Healthtech



# Ecosystem Rates the Healthcare Predicts for 2021



**The Impact of COVID-19 on Public Health Will Create New Opportunities Well Beyond 2021**

Billions have been spent on COVID-19 measures and the industry has seen many start-ups in 2021. Innovations and development will continue for several years.



**Healthcare Policies Will Focus on Product & Manufacturing Security and Supply Chain Control**

The sheer scale of the ongoing issues around product availability, manufacturing capacity and supply chain capabilities make this completely accurate.



**2021 Will be a Breakout Year for Community Health**

Unfortunately, this was also the year of breakdowns. Community Health policymakers had to go back to the drawing board multiple times across countries.



**Healthcare Providers Will be More Tech-Dependent Than Ever**

Surveillance, monitoring, analysis, sequencing and genomics have all exploded across the world, greatly supported and driven by tech.



**Medtech and Providers Will Find New Synergies**

True synergy was rare to find, with a few exceptions. Many collaborations were abandoned or aborted, and companies dominant before the pandemic simply grew stronger.



# #1 Second-order Impacts of COVID-19 Will Become Visible

It has been two years of growing inequality in access to healthcare; between countries at different economic levels, and across economic strata within countries. Some of the biggest, most prominent hospitals in the world have been transformed and have new workflows, operating practices and protocols. Healthcare is poised to be customised to an extent not seen before, to the advantage of patients. This is unlikely to be dismantled after the pandemic is declared “over”.

Disinformation and outright fraud, though, are rampant. Compounded by interruptions in information and products flow, this situation has worsened healthcare access especially in emerging economies. They will be forced to adopt health policies for the “greatest good” of the community or population, which is likely to leave behind millions of people.

Arising from the overuse/inappropriate use of antimicrobials and other drugs during the pandemic, healthcare will also face extraordinary challenges managing community-acquired infections and the increasing prevalence of polymicrobial and/or drug-resistant infections. Hospital acquired infections may spike in many parts of the world during 2022.



**While the mature economies begin to focus on tailored or customised healthcare practices, the emerging economies will be forced to deal with healthcare issues at a community or population level.**



**Krish Krishnan**

Principal Advisor,  
Biotech & Life Science



## #2 New Opportunities Will Arise in Tracking “Patient Journeys”

New opportunities will arise for innovative – including digital or smartphone – systems capable of tracking “patient journeys” through the healthcare system. Community and population health outcomes and individual patient outcomes will both become much more important to payers in 2022. Paradoxically, power and control will shift towards healthcare providers and away from patients or payers.

Although digital engagement with healthcare providers has grown, legacy issues of siloed data and systems will be perpetuated and continue to grow. Ecosystem predicts that government payers in particular will press for better patient and community outcomes during 2022 in a range of diseases – not just COVID-19. Some countries will promulgate new policies, perhaps forcing a realignment of insurance and reimbursement practices. A key paradox that will arise is that healthcare providers will benefit the most from much greater power and influence over how policy is implemented and where money is spent.



**While payers will press for better patient and community outcomes, healthcare providers will enjoy greater power and influence in framing and implementing healthcare policies.**



**Krish Krishnan**

Principal Advisor,  
Biotech & Life Science



## #3 Virtual Care Will Get Integrated into Healthcare

After years of effort and investments, remote care and telehealth finally became mainstream during COVID-19. This will prove to be more than a flash in the pan. Remote care will become part of the treatment protocol long after we leave the pandemic behind us. Areas such as mental health, aged care, post-operative care and even emergency care will be the low hanging fruits. This will lead healthcare providers to strengthen their investments in telehealth solutions. Adoption of telehealth solutions showed a sharp uptick after COVID-19 with many niche and regional solution players benefitting. Many of these incumbents risk finding themselves replaced by the next generation of telehealth solutions.

Larger tech providers have been building their Healthcare industry expertise over the last 2 years (some even before that – but it has finally paid off). Their core strength and go-to-market messaging will be in their ability to integrate with EMR and other provider systems – Microsoft Teams Connector, for example, integrates with Cerner, Epic, Allscripts and others. And they are not alone in ramping up their capabilities for a bigger share of the virtual care pie.



**Virtual care goes way beyond the technology used – it depends on the people and process capabilities. Providers should focus on building best practices and providing their clinicians the right skills and education (including on data privacy and security).**



**Sash Mukherjee**

Principal Analyst,  
Government & Healthcare



## #4 Healthcare Will Focus on Workforce Resiliency

Over the last 2 years, healthcare workers have faced (and continue to face) immense physical, mental and emotional stress; and this in an industry that was always plagued by skills shortage and burnouts. Several hospitals have reported that many employees – especially the nursing staff – are opting for early retirement. Employee safety and motivation have become a huge challenge.

Providers have been primarily focused on handling the challenges around operations and patient outcomes. In 2022 they will focus on regaining the trust and motivation of their employees. This will include investments in AI for better clinical insights, and automation to reduce the workload of the clinicians – leaving them more time to focus on mission-critical work. Providers will also invest in real-time and data-driven views of patient flows for better workforce planning.

This ongoing crisis has either inspired or acted as a deterrent to those choosing Medicine as a career. Education institutions will start to re-structure their courses aimed at building the healthcare workforce of the future. This will mean more training on technology use, but also modules on stress management and emotional resiliency.



**The human touch is still critical to improving healthcare outcomes. Provider organisations that fail to pay attention to their workforce's needs in 2022 will find themselves unprepared for when the new customer-centric health paradigm becomes a norm.**



**Sash Mukherjee**

Principal Analyst,  
Industry Research



# #5 Research Investments Will Focus on Infectious Diseases

Investment in research and drug development against infectious diseases will accelerate faster than for any other disease groups in the last 10-year period – with the possible exceptions of certain specific cancers.

This is fairly obvious and already in evidence across the world in the areas of vaccines and novel anti-infectives.

What may be less obvious, however, is that many countries and companies will over-invest in fundamental discovery, research and development capabilities in infectious disease. Expect more infectious disease research institutes to spring up, and to see millions more invested in genomics, proteomics and gene-based therapy against infectious disease, than has been envisioned before. This will also supercharge demand and investments in data analytics and AI in the Life Sciences industry.



**Investor dollars, whether public or private, are most likely to chase strategic investments in fundamental research, product development and manufacturing capacity for diagnostics, vaccines and therapeutics against infectious diseases.**



**Krish Krishnan**

Principal Advisor,  
Biotech & Life Science

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[www.ecosystem360.com](http://www.ecosystem360.com)

[info@ecosystem360.com](mailto:info@ecosystem360.com)



## Aga Manhao

Principal Advisor,  
Healthtech, Digital  
Transformation



## Amit Rana

Principal Advisor,  
Healthcare, Innovation and  
Entrepreneurship, Healthtech



## Alan Hesketh

Principal Advisor,  
CIO Advisory & Digital  
Strategy



## Arun Sethuraman

Principal Advisor,  
AI, MedTech



## Krish Krishnan

Principal Advisor,  
Biotech & Life Science



## Sash Mukherjee

VP Content &  
Principal Analyst,  
Industry Research