Welcome to the Healthcare in 2025 survey report. As a provider of collaborative technology solutions for healthcare Polycom sees the importance of understanding the vision of what healthcare delivery could look like in the future. Think back 10 years in healthcare and now think of today. The pace of technology and the appetite for it permeates all facets of our lives from mobile devices to wearable activity trackers. Information is readily on hand and increasing—and clearly it’s more efficient to move information than it is to move people. Imagine the possibilities if we fast forward ten years to 2025.

Today across the world, every nation is dealing with increasing pressures in the delivery of healthcare to its citizens with rising and ageing populations, physician shortages, equity in access and increasing cost pressures—and this is overwhelmingly apparent based on the feedback from the survey respondents, healthcare professionals like yourselves from across the world.

Being in the healthcare industry as long as I have and working with amazing visionaries (some we have featured within the report), and talking with governments and healthcare professionals in hundreds of countries, I believe universally changes in mindset and strategic objectives have begun. Organizations and governments are recognizing the need for patient-centric healthcare models and treatment at the point-of-care such as in the home and throughout the community.

Statistics show that three million patients worldwide are already receiving professional care by being connected to home medical monitoring devices and this number is expected to grow to 19.1 million patients around the world by 2018. Transitioning to a new healthcare model with a focus on keeping people healthy will require easy access to expert consultation no matter where or when the need arises, most often than not in the home or at the workplace.

As the world shifts towards population health, the entire care team will be responsible for the patients’ outcomes instead of just the physician/clinician. With these changes comes the need for connecting care team members, patients and families in an effective manner-regardless of location or device. Increasing patient engagement through greater collaboration will be a key driver in achieving better clinical outcomes for the future.

I sincerely hope you enjoy the report. If at any time you have questions, comments or feedback on the report, please email us: communicate@polycom.com

Ron Emerson RN BSN
Global Director of Healthcare

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1 Berg Insight (June 2014) – mHealth and Home Monitoring
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Across all regions being Europe, Middle East and Africa (EMEA), Asia Pacific (APAC) and North America (NA) and core markets within those, respondents were most concerned about how both the ageing and increasing population will cause a strain on the healthcare eco-system. Additionally, respondents felt that government policy or lack thereof is partly responsible for the bottlenecks in healthcare delivery; respondents from EMEA and NA were more critical of government policy compared to their counterparts in APAC.

Respondents were also optimistic about technology’s capability to solve the healthcare challenges, with the majority expecting technologies like big data, internet of things (IoT) and mobile connectivity to be in place and fully functional by 2025. However, it was determined that technology alone will not be able to solve these challenges.

It requires three other factors to work in tandem with it. These three factors are:

1. Government policy—pivotal in determining efficient healthcare practices

2. Revamping current incentive frameworks—if revenue is generated from patient care, there will be little incentive to create a model that focuses on prevention and the reduction in the number of people requiring treatment

3. Hiring technological experts—tech experts in c-suite positions within the healthcare industry is necessary to ensure that technology is used to increase efficiency rather than create another bottleneck

Ultimately, respondents were cautiously optimistic about the future and the role of technology to support innovation. In spite of the various stumbling blocks and challenges, respondents believe that the gradual improvements they are currently seeing will bear fruit by 2025.
Introduction

Based on the 2025 Healthcare Technology Innovation Survey results, this report will highlight the greatest challenges that healthcare faces leading up to 2025. Following which, it will provide an assessment on how optimistic respondents from the various regions and core markets are about technology’s ability to solve these challenges. The responses analyzed were from Asia Pacific (APAC), Europe, Middle East and Africa (EMEA), North America (NA), South East Asia (SEA), Australia, India, the UK and France.

Limitations

When respondents were segmented by region, the majority of them came from a few countries. Hence, results were often skewed towards the opinion of the predominant country rather than that of the entire region. For APAC, Australia (43.87%) and India (27.23%) made up the majority; in EMEA, it was the UK (50.46%) and France (19.88%); all respondents from NA came from the United States. Similarly, when segmented by occupation, the results tended to lean towards the viewpoint of those in nursing, clinical and patient services. To offset these limitations, research was done to obtain the necessary information required to analyze the key challenges in healthcare within the specific regions and core markets, thereby providing a more conclusive assessment.

Respondent breakdown for the core markets:

- NA: 61
- SEA: 120
- Australia: 211
- India: 131
- UK: 316
- France: 141
Challenges facing healthcare in 2025

The greatest challenge for healthcare in 2025

Regionally, respondents from APAC and EMEA both believe that an ageing population is cause for concern while those from NA think it will be the demand on the health service infrastructure. In Asia, specifically SEA and India, respondents felt that the increasing population size would be the greatest challenge. Alok Mishra, Vice-President of Strategic Business Systems at Johnson & Johnson Medical Asia Pacific stated, when referring to the problem of commercializing medical technology devices in Asia to cater to the large population growth: “There’ll be a constant pressure on healthcare providers and doctors, because the volumes will rise very rapidly as people grow older.” Considering that Asia will make up 45% of the world’s population by 2050, with 1.35 billion alone coming from India by 2025 and 810 million from SEA by 2020, an increasing population does appear to be a genuine challenge, particularly in Asia. NA respondents on the other hand are more convinced that the greatest challenge would be either the demand for health service infrastructure (25%) or policy/government (13%).

Respondents from India were the only ones who identified the quality of water and/or air as one of their greatest challenges in 2025. This is due to the large proportion of people still living in rural areas—68% as of 2013—where sanitation is severely lacking and the increase in pollution in urban areas, respectively.

“There’ll be a constant pressure on healthcare providers and doctors, because the volumes will rise very rapidly as people grow older.”

-Alok Mishra, Vice-President of Strategic Business Systems at Johnson & Johnson Medical Asia Pacific
Most respondents, no matter the geography or occupation, are split between three inhibitors: funding, access to healthcare and the lack of government support. Respondents in NA and Australia also feel that the disparity in the distribution of wealth would act as an inhibitor while those from the UK feel that it will be the increase in chronic disease.

These findings are unsurprising considering that the inhibitors identified for the future were similar to the inhibitors currently plaguing the healthcare sector. In India for example, 68% of its population live in rural areas where access to healthcare is a common problem. UK’s National Health Service (NHS) constantly struggles with funding, which resulted in an accumulation of “hidden deficits approaching USD 2.5bn (£1.6bn) and face a further USD 3.6bn (£2.3bn) black hole this financial year”. In the USA, access to healthcare is largely correlated with income disparity, and continues to persist in spite of healthcare reforms.

When segmented by occupation, an interesting trend is observed. The views of those working on the ground level and those in management were in contrast with one another. For instance in APAC, those working in executive, finance and innovation and planning roles believe the largest inhibitor is access to healthcare. Comparatively, those in nursing, administration and patient services think it is funding. Only in NA were both ground level and management staff generally in agreement, stating that (in)accessibility to healthcare as a result of income disparity is the largest inhibitor.
Similar to previous questions, respondents in all regions and core markets identified government policy and cost as the greatest barriers to healthcare adoption. Respondents from SEA, Australia, UK and France also feel that healthcare accessibility for all will be a cause for concern in the coming years in their respective markets. When segmented by occupation, this trend continues with majority feeling that policy will likely be an obstacle toward better healthcare in the future.

“Increasingly, we are seeing specialization by providers in health. Our specialists are concentrated in metropolitan hubs, making access in regional/remote areas difficult.”

-Dr. Simon Kos, Health Industry Manager, Microsoft
Respondents across the globe seem cautiously optimistic, believing that government policy is making an effort to keep up with healthcare innovation, although it is not quite there yet. Nevertheless, there is still a significant amount of respondents who express no confidence at all, specifically NA (46%), SEA (43%) and Australia (39%) among others.

Generally, respondents’ viewpoints seem to correlate with the current political, economic and social (PES) climate in their respective countries, with regards to healthcare. Cesar A Mazzota, CEO of MTN Healthcare, stated that the biggest problem the US has is that “there are too many different policies...set [by] too many regulators”. The UK and France on the other hand, are severely affected by limited resources, which inhibit the government’s ability to implement some form of meaningful change.

“There are too many different policies...set by too many regulators.”
-Cesar A Mazzota, CEO of MTN Healthcare, USA

What needs to change?

From the answers provided by the respondents, an ageing population, an increasing population, government policy and healthcare accessibility—both geographically and financially—are, and will be, the main challenges the healthcare sector faces.

Since an ageing and increasing population are inevitable, the key challenges that require change would be (1) decision making on a government level and (2) how to improve healthcare accessibility.

However, the majority of healthcare providers incorporate a business model that generates revenue when they treat patients, which as Ron Emerson, Global Director of Healthcare at Polycom Inc. states, “will provide little incentive for healthcare providers to change their current business practices.”

This is why government policy is such a pivotal challenge. Without proper policy, there is little motivation to transform a healthcare system that would ensure its people would have access to healthcare no matter their circumstance.
What healthcare delivery will be like in 2025

Will there be a greater emphasis placed by organizations on employee health programs due to possible impact on health insurance premiums?

The majority of respondents are confident about organizations placing greater emphasis on employee health programs. Similarly, when segmented occupationally, there is little deviation, although nurses and clinical practitioners are slightly less confident compared to the others in the industry.
It is interesting to note that apart from the rest of the regions and core markets, SEA and India are the only two who seem to think that organizations will be investing in prevention methods rather than treatment, similar to countries such as Denmark, Cuba and Singapore. Respondents from Australia on the other hand feel that organizations will be investing more in technology to solve some of the current bottlenecks plaguing the existing system. NA, UK and French respondents think effective care co-ordination will be where investments are allocated.

Occupationally, those on the ground level, no matter the geography, seem to be confident that organizations will be investing in technology to reduce the strain on the limited resource and manpower currently available to them. Whereas those in research and development tend to lean towards public health education.

“I think our goal should be to prevent people presenting with avoidable lifestyle diseases. That means encouraging a healthy population”

-Dr. Simon Kos, Health Industry Manager at Microsoft
Generally, all regions, core markets and occupations display similar sentiments about the likelihood of healthcare delivery organizations and insurance companies merging, with respondents from SEA and India being the more certain group. When segmented by occupation, those in management levels such as finance are slightly more certain about the potential for mergers compared to the rest; though the difference is small.

Again respondents appear relatively confident when it comes to the likelihood of only a handful of organizations controlling healthcare delivery. The correlation between the likelihood of consolidation and respondents concern for rising costs does appear to shine a light on the current business models healthcare organizations operate under and the inevitability of people having to pay more.
What healthcare technology innovation would respondents like to see become a reality in 2025?

The theme across the regions and core markets are similar. Most respondents want technology to solve accessibility, affordability and efficiency by 2025, which is in line with the responses provided for the previous questions.

Consolidating medical records and having them accessible electronically to healthcare providers, extended care team and patients was the most popular response from all regions and core markets. This is a challenge that many healthcare providers are currently facing. Dr. Simon Kos, Health Industry Manager at Microsoft stated: “Fragmentation of information is one of the great challenges our system has today” and our current system makes it difficult “to stitch together the data silos.” Virtual consults and in-home healthcare was another recurrent theme.

Respondent sentiments

<table>
<thead>
<tr>
<th>REGION/CORE MARKET</th>
<th>SUMMARY</th>
<th>EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAC</td>
<td>EFFECIENCE ACCESSIBILITY</td>
<td>“All health care facilities going online, technology based. It will become cost effective and accessible to all.”</td>
</tr>
<tr>
<td>EMEA</td>
<td>ACCESSIBILITY</td>
<td>“More health professionals involved in video call diagnosis e.g. doctors, nurses, nutritionists, pharmacists, chiropodists etc”</td>
</tr>
<tr>
<td>NA</td>
<td>CONSOLIDATION OF DATA</td>
<td>“Cloud database for back office start for pharmaceutical exchanges and integrative medicine data management” “Universal data standards so all systems can talk to each other”</td>
</tr>
<tr>
<td>SEA</td>
<td>AFFORDABLE &amp; ACCESSIBLE HEALTHCARE TECHNOLOGY CONSOLIDATION OF DATA</td>
<td>“Affordable hi tech” “Diagnostic tests accessibility” “All medical records to be paperless and online”</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>ACCESSIBILITY</td>
<td>“Fee free Online consultations recommending home remedy, visiting a GP or going to hospital” “Virtual Consultations”</td>
</tr>
<tr>
<td>INDIA</td>
<td>ACCESSIBILITY</td>
<td>“Telemedicine” “More affordable consultations”</td>
</tr>
<tr>
<td>UK</td>
<td>AFFORDABLE &amp; ACCESSIBLE HEALTHCARE TECHNOLOGY</td>
<td>“Low cost secure home video consultation” “Online / virtual appointment”</td>
</tr>
<tr>
<td>FRANCE</td>
<td>IN-HOME HEALTHCARE ACCESS VIRTUAL HEALTHCARE</td>
<td>“Surgical operation by [Virtual reality] without movement” “Consultation at home”</td>
</tr>
</tbody>
</table>
With the current technological advancement set to increase exponentially (Moore’s law), it is unsurprising that respondents feel optimistic about its potential to change health service delivery. Even respondents in regions such as EMEA and NA, who aren’t particularly satisfied with the current state of their healthcare system, are confident that personal connectivity will have a positive impact on healthcare delivery. In APAC, specifically respondents in SEA are confident most likely due to how technology has changed the way its countries operate. For example, people in rural Indonesia now use their smartphones for various activities previously not available to them, such as e-commerce and data logging. Hence they probably see no reason why it wouldn’t have the same impact on healthcare.

What healthcare technology innovation would you like to see become a reality in 2025? “Virtual healthcare”

-Clinical professional, Philippines
Can current advancements in technologies enable the following scenarios in 2025?

In-home virtual consultations and post-acute care without the need for travel by the practitioner

<table>
<thead>
<tr>
<th>Region</th>
<th>Yes (%)</th>
<th>In some cases (%)</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAC</td>
<td>13%</td>
<td>24%</td>
<td>45%</td>
</tr>
<tr>
<td>EMEA</td>
<td>17%</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>NA</td>
<td>7%</td>
<td>31%</td>
<td>46%</td>
</tr>
<tr>
<td>SEA</td>
<td>18%</td>
<td>23%</td>
<td>42%</td>
</tr>
<tr>
<td>Australia</td>
<td>9%</td>
<td>27%</td>
<td>46%</td>
</tr>
<tr>
<td>India</td>
<td>15%</td>
<td>21%</td>
<td>44%</td>
</tr>
<tr>
<td>UK</td>
<td>16%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>France</td>
<td>18%</td>
<td>28%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Family caregivers attend appointments by video, allowing more caregivers to be gainfully employed

<table>
<thead>
<tr>
<th>Region</th>
<th>Yes (%)</th>
<th>In some cases (%)</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAC</td>
<td>10%</td>
<td>40%</td>
<td>37%</td>
</tr>
<tr>
<td>EMEA</td>
<td>10%</td>
<td>30%</td>
<td>56%</td>
</tr>
<tr>
<td>NA</td>
<td>8%</td>
<td>33%</td>
<td>46%</td>
</tr>
<tr>
<td>SEA</td>
<td>9%</td>
<td>27%</td>
<td>49%</td>
</tr>
<tr>
<td>Australia</td>
<td>7%</td>
<td>24%</td>
<td>47%</td>
</tr>
<tr>
<td>India</td>
<td>9%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>UK</td>
<td>14%</td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
<td>40%</td>
<td>38%</td>
</tr>
</tbody>
</table>
Virtually enabled transitional care model that supports reduction in hospital readmissions

Improved mortality rates for emergency/acute care cases
Respondents were confident of current advancements in technology enabling all five of the above mentioned scenarios. NA respondents were slightly more confident compared to the rest, with the APAC and EMEA regions following close behind. However, it was the EMEA respondents, particularly in UK and France who had the most number of respondents who said no as well.

When segmented by occupations, respondents, especially those in R&D and innovation and planning were much more optimistic compared to the rest, followed by nurses (although they have cited that more could be done).
Supported by technology access, is virtual healthcare to the home a realistic scenario in 2025?

<table>
<thead>
<tr>
<th>Region</th>
<th>Yes</th>
<th>Unsure</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAC</td>
<td>8%</td>
<td>15%</td>
<td>86%</td>
</tr>
<tr>
<td>EMEA</td>
<td>23%</td>
<td>20%</td>
<td>57%</td>
</tr>
<tr>
<td>NA</td>
<td>3%</td>
<td>18%</td>
<td>89%</td>
</tr>
<tr>
<td>SEA</td>
<td>10%</td>
<td>18%</td>
<td>72%</td>
</tr>
<tr>
<td>Australia</td>
<td>9%</td>
<td>13%</td>
<td>78%</td>
</tr>
<tr>
<td>India</td>
<td>5%</td>
<td>17%</td>
<td>80%</td>
</tr>
<tr>
<td>UK</td>
<td>18%</td>
<td>21%</td>
<td>61%</td>
</tr>
<tr>
<td>France</td>
<td>37%</td>
<td>18%</td>
<td>44%</td>
</tr>
</tbody>
</table>

It was expected for respondents to be optimistic about virtual healthcare at home since some countries are already in the implementation stage. Furthermore, current technologies supporting telehealth and telemedicine applications or consumer communication tools such as Skype are already connecting patients with their healthcare provider. It is worth noting that the French have the least number of respondents who said yes (44%) compared to the rest. However, there was little indication as to what the reason was, especially since France has an 83.3% internet penetration as of 2014.

How significant are each of the following applications to home healthcare services in 2025? (Graph shows only those that were significant)

<table>
<thead>
<tr>
<th>Region</th>
<th>Pre-hospitalization</th>
<th>Post-hospital care</th>
<th>Chronic disease management</th>
</tr>
</thead>
<tbody>
<tr>
<td>APAC</td>
<td>41%</td>
<td>36%</td>
<td>43%</td>
</tr>
<tr>
<td>EMEA</td>
<td>40%</td>
<td>41%</td>
<td>40%</td>
</tr>
<tr>
<td>NA</td>
<td>56%</td>
<td>41%</td>
<td>28%</td>
</tr>
<tr>
<td>SEA</td>
<td>56%</td>
<td>40%</td>
<td>28%</td>
</tr>
<tr>
<td>Australia</td>
<td>41%</td>
<td>40%</td>
<td>28%</td>
</tr>
<tr>
<td>India</td>
<td>40%</td>
<td>40%</td>
<td>28%</td>
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<tr>
<td>UK</td>
<td>40%</td>
<td>40%</td>
<td>28%</td>
</tr>
<tr>
<td>France</td>
<td>40%</td>
<td>40%</td>
<td>28%</td>
</tr>
</tbody>
</table>

EMEA, NA, Australia and India are more convinced that home healthcare would have significant applications for chronic disease management.
Will technology and social networks affecting our ability to influence behaviours and life-style choices that impact health?

![Bar chart showing responses to the question.]

- Diagnostic tools are directly provided to patients with recommended courses of action
- Analytics become personalized and readily available
- Social peer group influence dietary choices
- Good exercise goes viral

Similar to previous technology related questions, respondents have high hopes for technology to improve the way healthcare is structured and delivered. The responses were evenly spread out among the regions and core markets. However occupationally, those in nursing and the clinical profession were more confident about diagnostic tools being directly provided to patients with recommended courses of action and analytics becoming personalized and readily available.

What healthcare technology innovation would you like to see become a reality in 2025?
“Clinic nurses trained in medications and care at home”

-Nursing professional, Australia
Can technology solve the healthcare challenges of 2025?

Technology has the ability to disrupt an inefficient and ineffective standard operating procedure

To fully understand just how effective technology can be at solving problems, we can draw on the example of the voting system in Brazil. Prior to 1994, the poor of Brazil had negligible influence over politicians because most within the demographic were skeptical about voting. In an attempt to change that, Federal Law made voting compulsory for those between the ages of 18-70, but that too proved futile. Since 42% of adult Brazilians hadn’t completed 4th grade, writing down the name of the candidates on paper ballots was too demanding for many of them. Then in early 1998, Brazil introduced an electronic voting machine.

This new technology allowed citizens to click on the picture of the candidate they wanted to vote for. As a result over 90% of the population voted, and more pro-poor candidates were elected to state legislature.

The technology driven world that we find ourselves in has provided us with a great opportunity to incorporate it into the delivery of healthcare. Specifically, big data, mobile and the Internet of Things (IoT) can support and facilitate the flow of information for effective care coordination and greater patient and citizen empowerment.

Big data

Big data has immense potential in healthcare, especially when it comes to the consolidation of data to allow for more efficient and effective decision-making. For instance, logistics companies such as DHL have shifted to an information-driven business model in order to achieve three main goals:
1. Operational efficiency
2. Improved customer experience
3. Creating new and better business strategies

To improve operational efficiency, logistics companies use big data to predict crime hotspots, detect weather anomalies and efficient driving routes at specific times; supply chain management is the most problematic part of any logistics firm and therefore requires data for operational effectiveness. They utilize data to understand specific user patterns to cater to each individual preference to better engage customers and improve retention. Data also creates better analytics when delivering retail and advertising insights that will result in better mass deliveries and capacity planning.

In short, big data has allowed traditional logistics companies to stay relevant in a disruptive era.

This has great potential for healthcare organisations. Data collection and utilization through cloud systems will allow better sample sizes for prescription models, access to patient information no matter the location where they seek treatment and better allocation of limited resources.

What healthcare technology innovation would you like to see become a reality in 2025?
“Patient videoconsultations becoming the norm (where appropriate) enabling access to specialist services for patients in rural areas”

- Telemedicine professional, Wales
Internet of Things (and Singapore’s smart nation concept)

By the year 2020, the Internet of Things (IoT), which is “a scenario in which objects, animals or people are provided with unique identifiers and the ability to transfer data over a network without requiring human-to-human or human-to-computer interaction” will likely be have 25 billion connected ‘things’ which includes more than 250 million connected vehicles, according to Gartner. An Accenture report stated that IoT could add $14.2 trillion to the world economy over the next 15 years. Many believe healthcare will be a prime beneficiary—wearable technology is often cited as one of the tools to support prevention and wellness in IoT. The graph below shows the comparison between the market size of the IoT against the PC, Smartphone and Tablet.

An example of IoT being integrated into business process would be Singapore. Singapore, in an effort to become the first true smart nation, is already in the process of capitalizing on this. The main goal is to allow the country to always be connected to ensure an efficient flow of data, thereby allowing for a more productive eco-system, not matter the industry.

What Singapore hopes to achieve with this is, among other things, is to control congestion and bottlenecks, create better data tracking and effective information and transaction flows to maximize its business environment. There is no doubt that Singapore’s healthcare will be able to benefit from this, thereby reducing bottlenecks and data consolidation in a much more efficient manner, reducing costs in the process.

“Access to patient health information has always been essential. The real issue is what information and how will it be delivered. That is what we are all working on in this sector.”

-Dr. Michael Watson, MBBS, FRACP, FRCPA, MPH&TM (Australia)

Market Size

2 http://whatis.techtarget.com/definition/Internet-of-Things
Mobile

3G and 4G connection has truly revolutionized personal connectivity. From the depths of the Serengeti to rural China, there are only a few places which mobile has yet to penetrate. For instance, by the end of 2014, there were 1.2 billion mobile phones users in China. Of it, 520 million were smartphone users (43%)—see figure below for smartphone penetration forecast.

Mobile connectivity in China has been the most effective way to reduce accessibility in a country with many geographical limitations. Many countries, especially countries in SEA such as Vietnam (37% compound growth of smart phone sales from 2011 to 2016) and the Philippines, have benefitted from mobile because it has reduced the cost of access to the internet and allowed vast numbers of people in rural areas to get connected. Similarly in Indonesia, which is dubbed a “mobile-first” country, most transactions (e-commerce) and communications (social media) are done via mobile. Between 2010 and 2020, Indonesia will add 91 million more internet and mobile users. When mobile integrates with healthcare delivery, the problem of accessibility becomes significantly subdued. Virtual consultations or having surgeons in urban areas assist those in rural areas with surgeries virtually would become a more feasible options; touchsurgery.com is one such example.

“What we are currently doing in Telehealth is a disruptive technology but is not funded in a way to be sustainable.”

-Dr. Michael Watson, MBBS, FRACP, FRCPA, MPH&TM (Australia)

The potential is evident. However, for it to work in healthcare, it requires three areas to change:

1. How governments shape healthcare policy and distributes funding
2. Revamping the current incentive framework in many of the regions and core markets
3. Hiring technological experts as employees in healthcare organizations
What else is required to solve the healthcare challenges of 2025?

Government policy

If we take a look at examples of healthcare success stories, such as Denmark, Cuba and Singapore, policies tend to have some degree of socialism in them. Rather than having its population settle their healthcare cost by themselves, these governments provide subsidies—Cuba and Denmark have full healthcare coverage while Singapore provides subsidies to lower income citizens. Furthermore, the focus of their healthcare policy is geared towards prevention rather than cure. While this does not guarantee success, it does provide an opportunity for the creation of a better healthcare system.

Revamping current incentive frameworks

Will premium healthcare services and choice of specialists only be available to those who can pay?

Respondents were overwhelmingly sure that premium healthcare and choice of specialists will only be made available to those who can afford it. This is the dilemma when it comes to inaccessibility.

While geographical inaccessibility can be solved through urban development and personal connectivity, financial inaccessibility can’t. It requires a change in how healthcare industry is incentivized.

Hiring technological experts

There are less than 10% of non-executive directors in the top 20 listed companies in APAC that have deep technological experience. When technology and telecommunication boards are excluded, that figure becomes less than 5%. Without technological experts in c-suite positions, technology will only become a bottleneck or worse, unused.

Having the right technology framework to build on

As collaboration between multiple parties for the future healthcare business model is a critical requirement, having a scalable network and a robust Unified Communications (UC) environment is necessary. The ability to integrate voice, video, content, specific healthcare applications and medical devices to support better and more efficient collaboration amongst clinicians, healthcare educators, administrators, the patient and families will result in better patient outcomes and reduced costs—as long as it’s simple to use and a familiar, consistent experience. The right technology environment should support multiple applications for economies of scale like care team collaboration and administration, medical education as well as telemedicine.
Conclusion

This report has identified four main challenges that the healthcare industry is facing or will face in 2025 based on the responses provided by over a thousand healthcare professionals from around the world, which are: (1) Ageing population (2) Increasing population (3) Government policy (4) Accessibility to healthcare services and infrastructure. The respondents were optimistic about technology’s ability to solve these problems or, at the very least, to facilitate another agent to solve them. However, it also established that without changing government policy making with respect to healthcare and altering the incentive structure of the medical profession, the impact of technology to implement different care delivery models would fall short. Hence, it would require a collective effort from all stakeholders to facilitate true innovation in the delivery of healthcare to all citizens in 2025.

Based on the findings we recommend healthcare organizations focus on three main areas to increase efficiency and reduce costs today in order to set the path for a more sustainable healthcare future:

1. How to keep in contact not just with the patient but with the wider care delivery team effectively
2. How to keep people healthy through prevention and wellness programs and better patient education
3. How to keep chronic disease from quickly turning into an acute episode, reducing hospitalization

Some examples of organizations leading the way with healthcare innovation supported by collaborative technologies from Polycom include:

About Polycom

Polycom helps organizations unleash the power of human collaboration. More than 400,000 companies and institutions worldwide defy distance with video, voice and content solutions from Polycom.

Transform healthcare and provide collaborative care from anywhere to anyone.

Healthcare organizations worldwide are turning to Polycom to improve prevention, wellness and patient services. Polycom solutions improve several aspects of their healthcare workflows—enabling telemedicine, care coordination, medical education and healthcare administration at a distance.

Our collaborative healthcare vision supports patient-centered care, multidisciplinary team meetings and collaboration across the entire continuum of care. This reduces unnecessary re-admissions and improves outcomes—no matter where patients are.

Polycom.com/healthcare

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About APGM

Asia Pacific Growth Management is a Singapore and Sydney based management consultancy. We work across most sectors but our specialty lies in the Technology, Media and Telecommunications sectors. We have helped a wide range of companies, from smaller, specialized high growth companies to multi-national businesses in established markets achieve strategic growth in Asia Pacific through strategic and operational consultation, mergers or acquisition, divestment or expansion and general advisory services.