Industries and companies are responding by developing solutions that are more responsive to patients’ needs, driven by emergent technologies, shifting consumer preferences, and increased access to health information. The result is an evolution of the role of health care stakeholders, including providers, payers, life sciences companies, policy makers, and consumers. This evolution is accompanied by changes in the way services are delivered and in the ways information is collected, analyzed, and used. The reconfiguration of health care delivery, investment, and innovation is reshaping the landscape for all stakeholders.

#### Drivers

- **Demanding demographics**
  - Aging populations
  - Chronic diseases
- **Increasing connectivity**
  - Globalization
  - Technological advances
- **Advancing technologies**
  - Genomics
  - Wearables
- **Personalization**
  - Individualized treatment
  - Tailored products
- **Governance**
  - Regulatory changes
  - Economic pressures
- **Socio-economics**
  - Disparities in access
  - Socioeconomic factors

#### Impact Zones

- **People**
  - Patients
  - Providers
  - Payors
- **Networks**
  - Information networks
  - Delivery networks
- **Practices**
  - Clinical practices
  - Business practices
- **Tools**
  - Diagnostic tools
  - Therapeutic tools
  - Administrative tools

#### Hurdles

- **Regulatory**
  - Compliance
  - Regulatory complexity
- **Sustainability**
  - Financial sustainability
  - Operational sustainability
- **Ethics**
  - Patient privacy
  - Data ownership
- **Security**
  - Data protection
  - Cybersecurity

#### Key Terms

- **Health care épícenter**
  - Thecenter of gravity of the health care industry
- **Health care marketplace**
  - The total market for health care goods and services
- **Health care ecosystem**
  - The interconnected network of stakeholders in the health care industry
- **Health care innovation**
  - The creation and implementation of new ideas and processes in the health care industry
- **Health care technology**
  - The tools and devices used in the delivery of health care services
- **Health care delivery**
  - The processes and methods used to provide health care services

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**Industry Compass 2.0**

Navigating the Life Sciences and Health Care Landscape

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**Institute for the Future**

John Bigalke, Vice Chairman and U.S. Industry Leader

Deloitte LLP, Health Sciences & Government

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**Tools**

- **Personalized health information**
  - Individualized risk assessment
  - Personalized treatment
- **Technology**
  - Artificial intelligence
  - Virtual reality
- **Analytics**
  - Predictive analytics
  - Prescriptive analytics
- **Data**
  - Big data
  - Real-time data
- **Devices**
  - Wearables
  - Sensors
- **Applications**
  - Mobile apps
  - Health apps
- **Platforms**
  - Health data platforms
  - Health information exchange platforms

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**Hurdles**

While the driven support rapid change in the industry, overcoming the hurdles of the future is not easy. The development of new solutions in the arena of health care and health science will be needed to address the complexity of the challenges that must be overcome to ensure the continued viability of the health care ecosystem. The key to navigating these challenges is a system that can adapt quickly and efficiently to the rapidly changing landscape of health care and health science.
Population Differences Challenge Health System
Without intervention, the children of each successive generation in the United States will face more illnesses and disabilities than prior generations. This growing number of chronically ill, along with increasingly aging, sedentary, immuno-compromised, and socio-economically diverse segments of the population, will strain society’s capacity to respond to health challenges.

Broader understandings of long-term health and wellness, motivations, and values will reshape consumer health markets. The workplace—even as it becomes a health management offering—will tie health to market position, productivity, innovation, and competitiveness. The workplace will become a central arena for managing health and well-being. Companies may also leverage these networks for marketing and research purposes.

Unhealthy Populations in the Global Health Economy
The globalization of biomedical informatics, innovation, and production moves technology-enabled research and delivery of care out of traditional settings. New settings arise in the home, on mobile devices, in workplaces, and in remote locations, creating new sites for health discovery and delivery. Populations in the global health economy—from patients to physicians to scientists—are going mobile. These populations are generating huge amounts of data, which must be efficiently collected, analyzed, and interpreted.

Signals
The demands for health care products and services are increasing. The competitiveness of the health care sector is enhanced by the increasing complexity of the products and services offered. The demand for new and improved health care products and services is also influenced by the increasing cost of health care, the increasing demand for health care, and the increasing competition in the health care sector.

Drivers
Drivers identify major trends and factors driving change. They are drawn from the latest research and forecast of what is likely to happen in the next decade. Drivers are not exhaustive, and new drivers may emerge.

Impact Zones
Impact zones identify the areas where the drivers will have the greatest impact. They are drawn from the latest research and forecast of what is likely to happen in the next decade. Impact zones are not exhaustive, and new impact zones may emerge.

How to Use This Map
Industry Compass 2.0 is designed to help you think about the future in an organized way. It is designed to be a conversation starter for leaders. The map is designed to help you see how your own environment is changing and what it means for your organization and industry.

Impact Zones
Impact zones are the areas where the drivers will have the greatest impact. They are drawn from the latest research and forecast of what is likely to happen in the next decade. Impact zones are not exhaustive, and new impact zones may emerge.

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Rising pressure in policy
Many differences divide the United States population—lifestyle choices; living arrangements; concentrations of wealth, education, and health status; and health care access and affordability. These differences will increase over time, putting increasing strain on health care systems and raising questions about the future of the health care delivery system.

Expanding connectivity: access, support
The globalization of the Internet, computer networks, and mobile computing is changing the way people access and support each other. The Internet is a powerful tool for connecting people with others who have similar interests or needs, and for sharing information and resources. 

Increasing transparencies
Increasing transparencies refer to the growing amount of information that is available to the public about health care organizations and their performance. The public has access to more information about health care delivery, health care costs, and the performance of health care providers. This trend is likely to continue, with more and more people using the Internet to access information about health care providers and their performance.

Converging relationships
Converging relationships refer to the growing number of relationships that are occurring between health care providers and other organizations. These relationships are likely to increase in the future, with more and more health care providers partnering with other organizations to improve the quality of care they provide.

Networks
Networks refer to the growing number of networks that are being formed among health care providers and other organizations. These networks are likely to increase in the future, with more and more health care providers partnering with other organizations to improve the quality of care they provide.