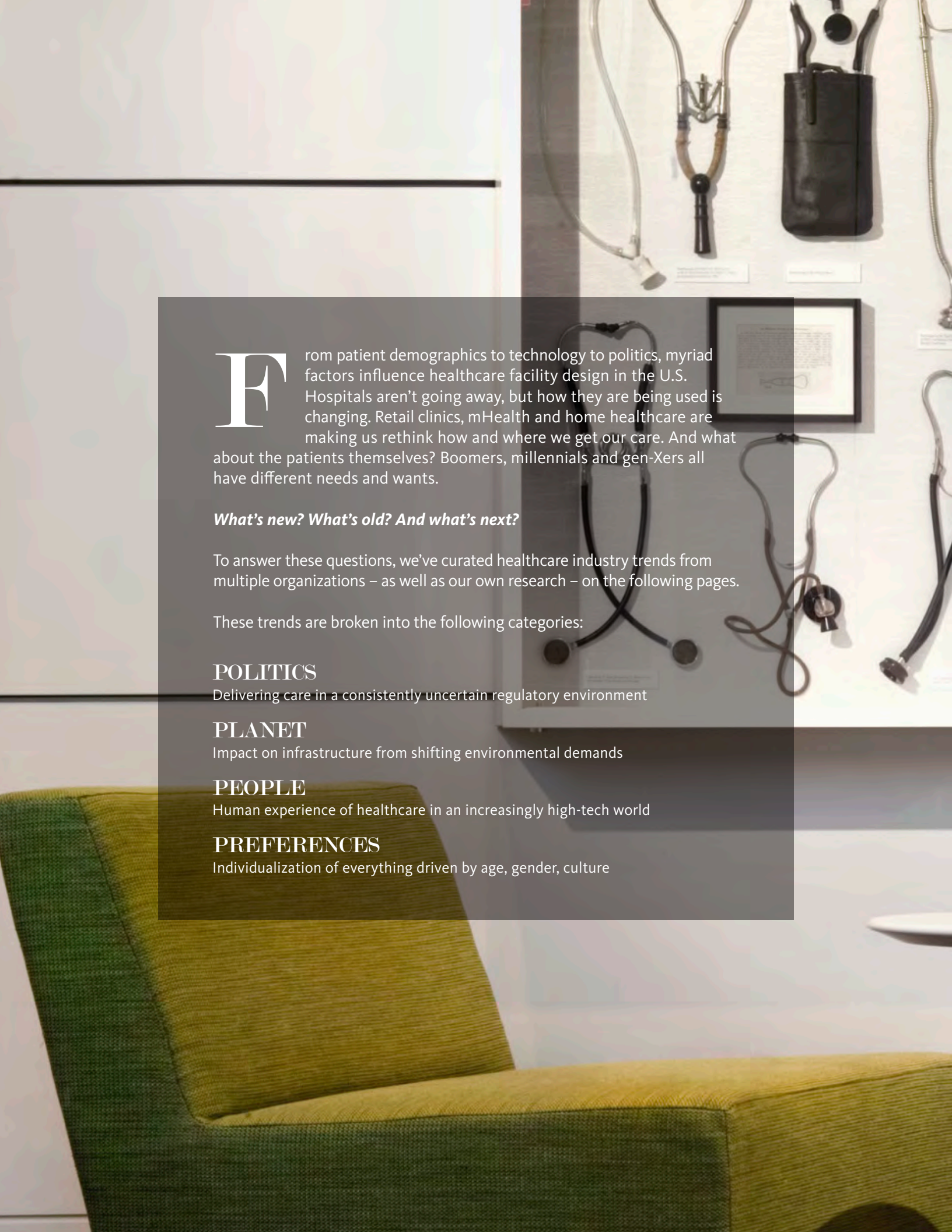# HEALTHCARE TRENDS FOR 2017

F rom patient demographics to technology to politics, myriad factors influence healthcare facility design in the U.S. Hospitals aren't going away, but how they are being used is changing. Retail clinics, mHealth and home healthcare are making us rethink how and where we get our care. And what about the patients themselves? Boomers, millennials and gen-Xers all have different needs and wants.

What's new? What's old? And what's next?

To answer these questions, we've curated healthcare industry trends from multiple organizations – as well as our own research – on the following pages.

These trends are broken into the following categories:

POLITICS
Delivering care in a consistently uncertain regulatory environment

PLANET
Impact on infrastructure from shifting environmental demands

PEOPLE
Human experience of healthcare in an increasingly high-tech world

PREFERENCES
Individualization of everything driven by age, gender, culture

POLITICS

"Top Health Industry Issues of 2017: A Year of Uncertainty and Opportunity"

SOURCE:

Price Waterhouse Coopers Health Research Institute annual report

Top 10 Health Issues

Many of 2017's Top issues highlight how this shift toward value is occurring, and how traditional health organizations and new entrants are responding to it. There are three main tactics that organizations are using to address this shift to value—adapting, innovating and building new programs and approaches to their work.

Adapt for Value

1 Under a new administration, the fate of the ACA remains unclear

2 Pharma's new strategic partner? Patients

3 Easing the training wheels off value-based payment

4 Insert your card here for healthcare

Innovate for Value

5 Paging Dr. Drone: It's time to prepare for emerging technologies

6 The battle against infectious diseases sparks invention

7 Rx cauliflower: Nutrition moves to population health

Build for Value

8 Putting the brakes (gently) on drug price

9 A year of new partnerships and collaborations

10 Preparing medical students for work in a value-based world

PLANET

"Climate-Smart Healthcare: Low-Carbon and Resilience Strategies for the Health Sector"

SOURCE:

World Bank Group, 2017

Low-carbon healthcare provides an approach for designing, building, operating, and investing in health systems and facilities that generate minimal amounts of greenhouse gases. It puts health systems on a climate-smart development path, aligning health development and delivery with global climate goals.

This approach saves money by reducing energy and resource costs. It can improve the quality of care in a diversity of settings. Low-carbon healthcare strengthens health systems by increasing facilities' resilience to extreme weather events and other disasters, while also promoting approaches to adaptation.

In low-resource, energy-poor settings, powering healthcare with low-carbon solutions can enhance access to care, contributing to institutional goals.

Key elements of low-carbon healthcare:

- Health system design and models of care based on appropriate technology, coordinated care, emphasis on local providers, and driven by public health needs

- Building design and construction based on low carbon approaches

- Investment programs in renewable energy and energy efficiency

- Waste minimization and sustainable healthcare waste management

- Sustainable transport and water consumption policies

- Low-carbon procurement policies for pharmaceuticals, medical devices, food, and other products

- Resilience strategies to withstand extreme weather events

PEOPLE

Gensler's 2017 Design Forecast

SOURCE:

Gensler

Our 2017 Design Forecast identifies the trends that will shape design's future, and show how they are already influencing our work—signaling a transformation in built space that is only beginning.

1

Designing the Experience-Driven Life

The impact of technology and connectivity on place is already visible. Place is where people interact with the digital and physical. Making this seamless and coherent is the starting point, enhanced by other elements that elevate the human experience of place: resonant, engaging, supportive, even life-changing.

People's expectations of experience are conditioned by the almost-human, responsive way their smart devices interact with them. People expect to self-direct their lives, to shape and curate much of what they experience. Design will invite their participation, using the "smarts" that places, spaces, and products will acquire.

Part of people's desire to shape experience is the expectation that it will be accessible to them. It means that experience will be designed to compensate for differences in sensory perception. It will enable people to navigate the unfamiliar.

2

Delivering Tomorrow's Livable Cities

Climate change is one of humanity's greatest threats. Buildings and transportation are huge factors. Resilient cities are crucial to reducing their impact. When Gensler signed the Paris Pledge for Action, we analyzed our own built portfolio. That analysis confirms that we have the means now to meet the pledge's building performance goal.

Cities provide the framework that communities and people need to thrive. They enrich quality of life by supporting growth with infrastructure and amenities, and connecting development to transit. They preserve the public realm as urban breathing room. Their vitality attracts top talent and encourages it to stay.

In an era of volatility, flexibility will be a cardinal virtue. The distinction between long-lived, open-ended urban frameworks and the faster-paced infill that moves in and out of them will be more important. The ability to remix keeps cities and their buildings vibrant. Planning new development so it can easily remix is resilient—a move that reduces cost, risk, and waste.

Continuing urbanization will impact many 21st-century cities. To keep the districts and neighborhoods in these cities livable, megaprojects will be a more prevalent form of development. Working at an urban scale can speed up the creation of living/working space and needed infrastructure. An emphasis on human experience will keep cities' urbanity intact.
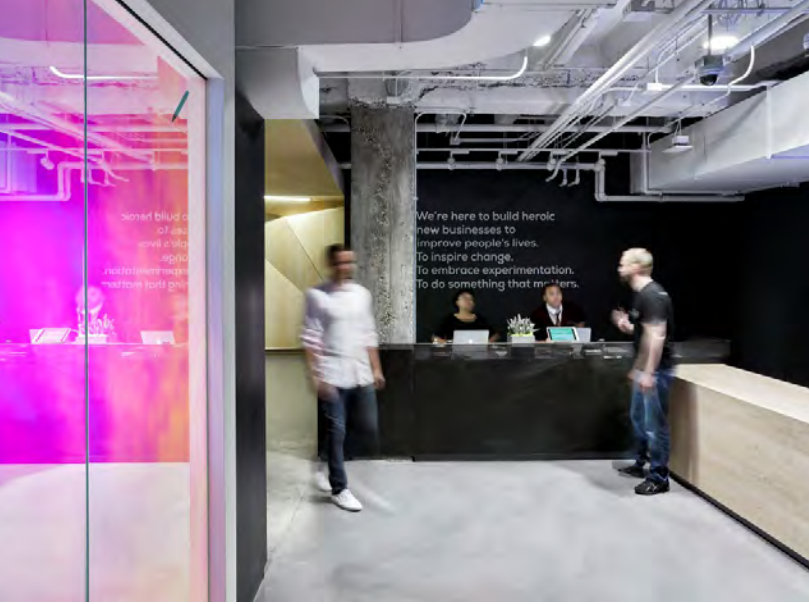
3

Designing For Everyday Impact

Expectations of inclusivity will tip the balance toward community and transparency. The boundary between the public realm and private or exclusive may be more porous and nuanced, especially when public-serving open space or cultural elements are involved.

The places in between can easily slip off public and private maps. If settings like this are intrinsic to the everyday, their stewards will want to be more visible. Upkeep and safety are givens, but these places will attract patrons and impresarios of the experience.

The desire for urbanity will favor a richer, denser, and less expected mix of people and activities. The embrace of a startup, freelance, maker, artisanal, farm-to-market economy will give rise to hybrid settings, used intensively, that change from day to night.

Part of people's desire to shape experience is the expectation that it will be accessible to them. It means that experience will be designed to compensate for differences in sensory perception. It will enable people to navigate the unfamiliar.

4

Making Design More Responsive

Virtual reality (VR) and augmented reality (AR) are changing the design process. VR gives people a direct, visually immersive sense of the space, engaging clients and end users as active design participants. AR lets clients and design teams model and test options in real time, sharing performance data as they do so.

Buildings and their elements and systems will be connected and smarter, using technology to maintain net-zero performance, "tune" to human needs, and reshape settings 24/7 to accommodate a wide range of activities.

As innovations like immersive and computational design, digital fabrication, prefabrication, composite materials, and robotic construction take hold, look for quantum leaps in design and delivery. The process will be faster and more seamless, letting clients and their teams co-create projects at different stages of development, from concept to completion, without having to be together in the same location.

As demand shifts to settings that can support a changing mix of needs and activities, new players will emerge to help organizations and people access space on a just-in-time basis. Some players will follow the sharing platform model. Others will offer maker, co-working, lab, accelerator, and incubator spaces—hybrid settings serving new markets. Built space is shaped by regulation and standard practice, and both will be challenged. Cities favoring an entrepreneurial and competitive spirit will embrace the change. But the industry will also respond with new products and services tailored to a changing clientele.

PEOPLE

"The State of Patient Experience 2017: A Return to Purpose"

SOURCE:

Report on the Beryl Institute Benchmarking Study

5 MILLION

The number of Google Cardboard devices shipped in 2015 according to the company's own estimates.

12 MILLION

The number of VR headsets estimated to be sold in 2016 by the big four—Samsung, Oculus, HTC and Sony—according to asset management firm Piper Jaffray.

28 MILLION

The number of customers who will have bought a virtual reality by 2018 according to research firm KZero.

$30 BILLION

The number of customers who will have bought a virtual reality by 2018 according to research firm KZero.

Conclusions:

- Experience efforts are expanding and are now an integral part of the fabric of our healthcare efforts.

- Patient experience remains a top priority with a focus on employee engagement now seen as a central driver in experience efforts.

- Leadership and culture are now the significant motivators versus the historic focus on mandates and requirements, and there is a recognition of the impact that patient/family voice and caregiver engagement has on the work of healthcare.

- Patient experience itself continues to establish presence with the role of patient experience leaders, experience team size and the use of a formal definition on the rise.

- Patient experience is now being recognized as an integrated effort touching on much of what we do in healthcare and one that drives clear and measurable outcomes.

Experience will be and is already emerging as a key, if not the primary, differentiator in healthcare.

The opportunity in front of each organization is how they will seize this moment.

HEALTH CARE

Medical institutions have been using CGI and virtual simulations for diagnosis and treatment for years now, and they're only going to get more immersive. Software companies Surgical Theater and Conquer Mobile use images from CAT scans or ultrasounds to build 3D models of a patient's anatomy. A company called MindMazeto has created an immersive virtual-reality therapy for stroke and brain injury victims to regain motor and cognitive functions.

PREFERENCES

"Millennials Overtake Baby Boomers
as America's Largest Generation"

SOURCE:

Pew Research Center

Millennials, whom we define as those ages 18-34 in 2015, now number 75.4 million, surpassing the 74.9 million Baby Boomers (ages 51-69). And Generation X (ages 35-50 in 2015) is projected to pass the Boomers in population by 2028.

With immigration adding more numbers to its group than any other, the Millennial population is projected to peak in 2036 at 81.1 million. Thereafter the oldest Millennial will be at least 56 years of age and mortality is projected to outweigh net immigration. By 2050 there will be a projected 79.2 million Millennials.

Though the oldest Gen Xer is now 50, the Gen X population will still grow for a few more years. The Gen X population is projected to outnumber the Boomers in 2028 when there will be 64.6 million Gen Xers and 63.7 million Boomers. The Census Bureau projects that the Gen X population will peak at 65.8 million in 2018.

There were an estimated 74.9 million Boomers in 2015. By midcentury, the Boomer population will dwindle to 16.6 million.

APPENDIX

More Studies & Resources

"Delta: Vol. 1"
HDR, 2016

"Who Are the Millennials?"
Douglas Main, Live Science, September 2017

"Lessons from Hurricane Harvey"
Alex Wilson, Resilient Design Institute blog, August 2017

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