



**Dalibor Frtunik**

***How has the market evolved to respond to digital health demand?***

**SORSIX**



# Digital health demand

## Major themes – 1/2

### Quality is more important now

- Legacy solutions are often:
  - Basic
  - Point solutions
  - Not integrated
- There is an accelerating trend to replace this with:
  - Fully integrated and interoperable tools
  - Fully cloud-based, modern solutions, with apps and other edge device support
  - Digital workflow, instead of simple information systems
- BUT:
  - Slow procurement (e.g. continuous cancellation of tenders in ANZ)
  - Lack of 'total system' vision can stymie true benefits
- **The market is starting to realize that not all digital solutions are equal and not all digital strategies are sufficient**



# Digital health demand

## Major themes – 1/2

### Consumer impression of fungibility

- Health consumers want basic functions as a commodity service
  - Increasingly they *expect* them too
- Portable health records are still in their infancy
- To the previous point – quality is not yet enough of a criterion here
  - Consumers are unaware of what exists, since healthcare is often a point interaction
  - Chronic conditions are well ahead of this but often served with niche products

### Digital literacy

- An obstacle to digital health was always digital literacy, esp. of older generations
- This problem is evaporating at an accelerating rate
  - E.g. the first online booking by a public NZ patient was a 92-year old man who did it himself, on his smartphone
- Clinicians increasingly are willing to dabble, esp. with AI tools, although it is not clear if these will have the right impact – but friction is decreasing



# What is coming

## Market trends we are monitoring

### Market engagement

- The market is well and truly digital first now
- Even physical devices are increasingly incorporating telemetry or full digital workflow, e.g. 360med
- There is still a lack of standards uptake and effective use of standards, despite progress in recent years

### Procurement is in a transition phase

- We still see some large, transformational projects hit the market, but these often do not pass EOI/RFI stage
- Increasingly smaller procurements are at least aligned to overarching strategies
- The strategies are being regularly updated with new learning and market pressure, but this is not
- Many global elections have disrupted public procurement
  - 2023 had the most elections of any year in human history, globally
- The private sector is still very stable, but disruptive models are able to have impact
  
- **We don't know what the future will bring**



# Contact

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