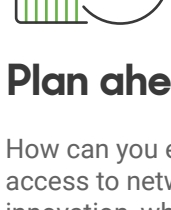


Innovating healthcare in extraordinary times



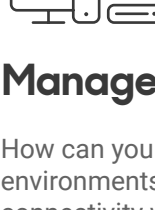
New perspectives for healthcare

Healthcare providers of all sizes have to respond quickly to unpredictable changes while doing more with less, driving digital transformation, and mitigating risk. To thrive in an era of uncertainty, healthcare providers have to ask hard questions:



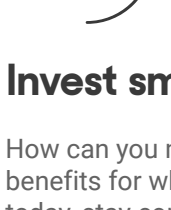
Plan ahead

How can you ensure reliable, robust access to networks and drive innovation, while adapting rapidly to unexpected circumstances?



Manage complexity

How can you deploy in new environments and manage connectivity with staff shortages?



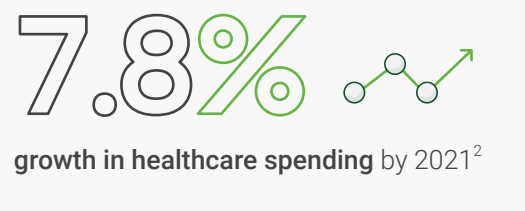
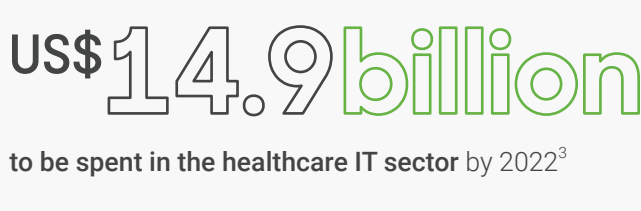
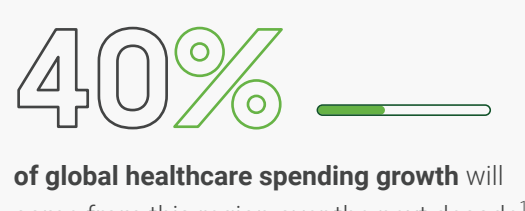
Invest smarter

How can you maximise the benefits for what you invest in today, stay compliant and yet responsive to change?

Emerging trends in healthcare across Asia Pacific

Forward-thinking providers are introducing new, technology-enabled ways of delivering patient-care to reduce costs and conduct safer operations.

Healthcare providers to spend more



Trends to watch

- Business continuity**
Ensure operations can continue despite disruptions.
- Smarter facilities**
Enhance connectivity and functionality.
- Telehealth & telemedicine**
Deliver medical services remotely.
- Remote patient monitoring**
Check on patients from anywhere.
- Medical device integration**
Utilise device data in connected systems, in real time.
- Healthcare cybersecurity**
Protect sensitive information from cyberthreats.
- Personalised patient experiences**
Engagements tailored to each patient.
- Clinical communications collaboration**
Make decisions together, even while apart.

Technologies to consider

Healthcare business models across Asia Pacific are expected to evolve as new entrants threaten to disrupt the market, technologies advance, and regulations change. Many healthcare providers are responding with plans that will help them manage uncertainty more easily. It will be essential to invest in technology to engage patients anywhere, anytime, on their terms.



Rethink service delivery⁵

- Online platforms**
Online patient engagement will continue to become an expectation, rather than a nice-to-have, and will allow providers to reach home-bound patients and those in remote rural areas.
- Big data analytics**
Data-driven insights will improve procedures, cut costs, and allow providers to offer new services.
- Robotics**
Robots will deliver goods and help monitor patients, reducing reliance on manpower and lowering the risk of contagion.
- Faster connections**
Remote communications and medical scans will require fast, reliable connections, from 5G or Wi-Fi 6.



Reduce inefficiencies

- Work remotely and securely
- Manage multiple network sites simultaneously
- Troubleshoot networks quickly



Mitigate risks

- Increase network reliability
- Invest in scalable solutions
- Secure patient data

Transform patient engagement

Differentiating healthcare brands through an enhanced customer experience is key to standing out in a competitive market⁶. A better experience includes faster connectivity for patients and secure Wi-Fi for visitors. These are areas where providers can take a new approach:

Valuing customers in Asia Pacific

- 35% of healthcare providers will **optimise the digital patient experience** as a top three strategic imperative by 2021⁷.
- 72% of consumers want **shorter wait times**⁸.
- 77% of consumers want **personalised preventative care**⁹.

The regional commitment

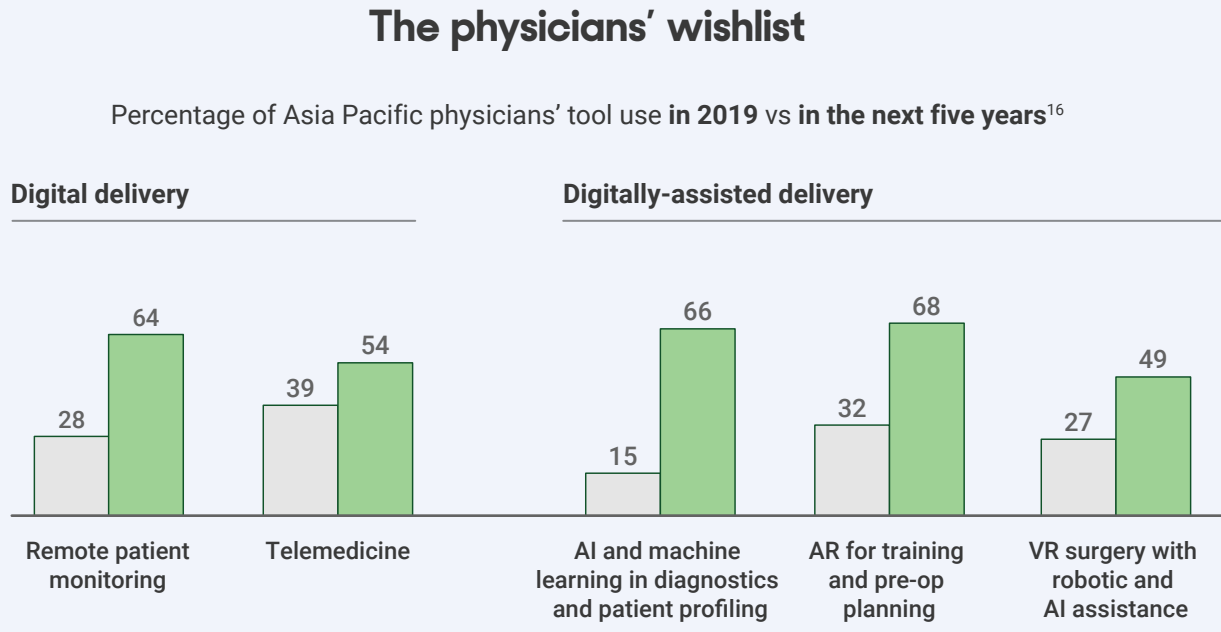
- 33% of healthcare providers plan to **implement Internet of Things (IoT) solutions** in their **care delivery systems** by 2022¹⁰.
- 45% of all **mobile health solutions** were in this region in 2019¹¹.
- 50% of clinical apps will have **speech, sensors or gesturing** for primary data capture, supported by **artificial intelligence**, by 2023¹².

The global commitment

- 50% of physicians and consumers will be ready to **adopt digital delivery models** like telemedicine and remote care in the next five years¹³.
- 50% of healthcare providers will **integrate digital monitoring, diagnostics and care management** into clinical workflows by 2024¹⁴.
- 75% of healthcare delivery organisations will have invested in an **artificial intelligence** capability that explicitly improves either **operational performance** or **clinical outcomes** by 2021¹⁵.

The physicians' wishlist

Percentage of Asia Pacific physicians' tool use in 2019 vs in the next five years¹⁶



Notes: Percentage of physicians who indicated they would use a tool now or in the future, on the basis of the question: "From the list of tools and systems below, which (1) have you used in the past 12 months and (2) would you use in the next 5 years if made available?"; AI stands for artificial intelligence, AR for augmented reality, VR for virtual reality.

Sources:

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⁵ BNP Paribas: COVID is Accelerating Trends in Smart Sustainable City and Healthcare Innovation, 10 Mar 2020
⁶ IDC: The New Digital Patient Experience in Asia/Pacific (Excluding Japan), Aug 2019
⁷ IDC: Unlocking the Potential of Healthcare in Asia/Pacific, 5 Nov 2019
⁸ Bain & Company: Bain Front Line of Healthcare Asia-Pacific Survey, 2019 (n=1,823), reported in Asia-Pacific Front Line of Healthcare Report 2020, pg 10
⁹ Bain & Company: Bain Front Line of Healthcare Asia-Pacific Survey, 2019 (n=1,823), reported in Asia-Pacific Front Line of Healthcare Report 2020, pg 10
¹⁰ Bain & Company: Asia-Pacific Front Line of Healthcare Report 2020, pg 10
¹¹ IDC: New IDC Report Reveals Healthcare Providers in Asia/Pacific* Will Invest USD 16.9 Billion in Internet of Things (IoT) Solutions by 2022, 24 Jun 2019
¹² Grand View Research: mHealth Market Size, Share & Trends Analysis Report by Component (Wearables, mHealth Apps), By Service (Monitoring, Diagnosis), By Participant (Mobile Operators, Device Vendors), By Region, And Segment Forecasts, 2020 - 2027, Feb 2020
¹³ IDC: Unlocking the Potential of Healthcare in Asia/Pacific, 5 Nov 2019
¹⁴ Bain & Company: Asia-Pacific Front Line of Healthcare Report 2020, pg 1
¹⁵ Gartner: Predicts 2020: Healthcare Providers Must Strike A Balance For Digital Business Success, 23 Dec 2019
¹⁶ Gartner: The Need for AI Governance in Healthcare, 12 Jul 2019
¹⁷ Bain & Company: Bain Front Line of Healthcare Asia-Pacific Survey, 2019 (n=257), reported in Asia-Pacific Front Line of Healthcare Report 2020, pg 9