



# 5 Healthcare predictions for 2020

By Lia Novotny | December 11, 2019

2019 was a tumultuous year for healthcare, delivering much in terms of innovation and policy debate. As the year ends, athenaInsight sat down with three healthcare experts to share their predictions for the coming year. A clear trend emerged: in 2020, the tide of value-based care will continue. To that end, the nexus of care will shift, employers and payers will drive innovation, and technology will pave the way for better risk analysis and patient outreach.

## Value-based care will reach a tipping point

According to Koustav Chatterjee, digital health industry analyst at Frost and Sullivan, "2020 is going to be a landmark year when, for the very first time, both payers and providers will embrace full-blown value-based care strategies." As regulatory requirements become clearer and more stable, and data is finally showing a tangible ROI, the transition to risk and quality-based programs will continue unabated.



This reflects the trend that Michael Callum, M.D., president of Steward Medical Group, predicts – a focus not just on innovative reimbursement models, but on “improving value by lowering the cost to provide the same high-quality care.” The focus cannot just be on regulatory and payer programs, but on really understanding how to provide high-value care.

And, according to Denise Brown, M.D., chief strategy officer of Vituity, a physician-led and -owned multispecialty partnership with over 300 practice locations, this can have profound positive effects for providers. “It’s my hope that in regaining our purpose and joy in the work that we do, we end up all realizing that it’s never been about anything but value.”

## High-value care will move away from academic medical centers

One way that Callum sees large, integrated health systems increasing their focus on high-value care is by shifting as much primary and secondary care as possible out of academic medical centers into community clinics. “If you push as much secondary care into the community as you can, you can deliver the same quality at a much lower cost.” And the added benefit is more convenience and better access for patients.

This may be the silver bullet in value-based care savings, and can only be achieved by integrated health systems not overly reliant on filling beds in academic medical centers. According to Callum, telehealth and improved home-based monitoring systems will speed and support this trend to deliver care in more convenient locations.

Brown points out that it will be incumbent on providers to help patients understand the new home health and telehealth options, which may require them to also rethink how they can and should provide care. Once physicians open their minds in this way, they will discover that patients are clamoring for this kind of convenience and access.



And telehealth and remote monitoring tools will only increase the opportunities for interdisciplinary interventions, easily integrating social workers, clinical pharmacists, and others. In 2020, Brown says, “most of the interesting stuff is going to happen outside of the walls of the hospital – there’s no doubt, no doubt in my mind.”

Payers are driving this shift as much as anyone. United Healthcare is no longer paying for in-patient stays for procedures that can be done in ambulatory surgery centers. And they are providing incentives for MRIs to be done at lower-cost independent centers. In 2020, this is a trend that will really make a difference in shared savings. According to Callum, “there should never be another colonoscopy or hernia repair done in an academic medical center.”

## Employers and payers will push for better outcomes and shared savings

Payers will also continue to double down on risk contracting based on agreed-upon quality measures. Callum says this has already shown results at Steward, and he sees the trend increasing in 2020. “Our data show that we’ve been able to lower the cost of care by entering into risk agreements with payers.”

Employers will exert their influence as well, with many embracing direct contracting with provider networks, especially Accountable Care Organizations (ACOs). Chatterjee sees a movement of “employers abandoning their longstanding payers in favor of providers willing to support an entire employee population.” And employers will manage enrollment, outcomes assessment, and shared savings with their own dedicated benefits teams.

Steward is already acting on this trend. Their recent acquisition of OnSite Care allows them to provide on-site primary care to all employees of medium and large employers who contract with them. “We create a shared savings model. They pay us, and we guarantee them a reduction in cost; then we share the reduction.” Steward is even seeing municipal governments seeking similar arrangements.



In Silicon Valley, where Brown is, this model is already a reality. “We have referral arrangements with tech companies that their continuity and primary care clinics can transfer their patients to our Emergency Departments at any time, and we have streamlined systems of communication to make that happen.” These kinds of connections will take off elsewhere in 2020 and allow healthcare to really elevate its game in terms of continuity of care.

And Chatterjee sees a further trend for particularly sophisticated employers to begin setting up centers of excellence to provide targeted care for high-risk conditions like diabetes, cancer, and chronic kidney disease.

## Technology will support better population health

According to Chatterjee, 2020 will see a further expansion of artificial intelligence in medical imaging, clinical documentation, virtual triage, and data analytics. And it will be supported by emerging technologies. “Voice recognition, natural language processing, deep learning, chatbots, and disease pattern recognition technologies will all gain prominence in healthcare in 2020.”

And Chatterjee sees a bright future for systems designed to address social determinants of health. “By the end of 2020, a significant number of U.S. health systems and payers will use this technology to perform clinical risk assessment and prioritize population health outreach.” These systems combine clinical, financial, and social data to predict and shift population health trends.

## The opioid epidemic will finally begin to abate

One surprising – and optimistic – prediction Brown made is that 2020 will see healthcare and the nation make huge strides in treating and preventing opioid use. The big reason? Widespread adoption of medication-assisted treatment (MAT). And telehealth will be a big part of that, supporting MAT in rural areas where there aren’t enough waived providers. Telehealth will also expand access to peer counselors for patients with substance use disorder to better support their recovery.

“I think that we’re hopefully going to resurrect an entire generation of Americans,” says Brown. “We’re going to take the stigma away from that, and help people go back to being productive members of society.”

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