

# Future impact of societal shifts on healthcare & pharma



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# Age of Uncertainty

Increasingly  
complex and  
uncertain global  
landscape

Polycrisis

pandemics,  
geopolitical  
conflicts, climate  
stress, supply  
chain  
disruptions...

Systemic  
instability is the  
new normal

# Global Risks

Short term (2 years)

Long term (10 years)

- Geopolitics
- Technological
- Societal**

Geoeconomic confrontation

Misinformation and disinformation

Societal polarization

Extreme weather events

Biodiversity loss and ecosystems collapse

Critical change to Earth systems

Environmental

Source: WEF, 2026 Global Risks Perception Survey 2025/2026



# Society in transition

World in disorder

Experience of Loss

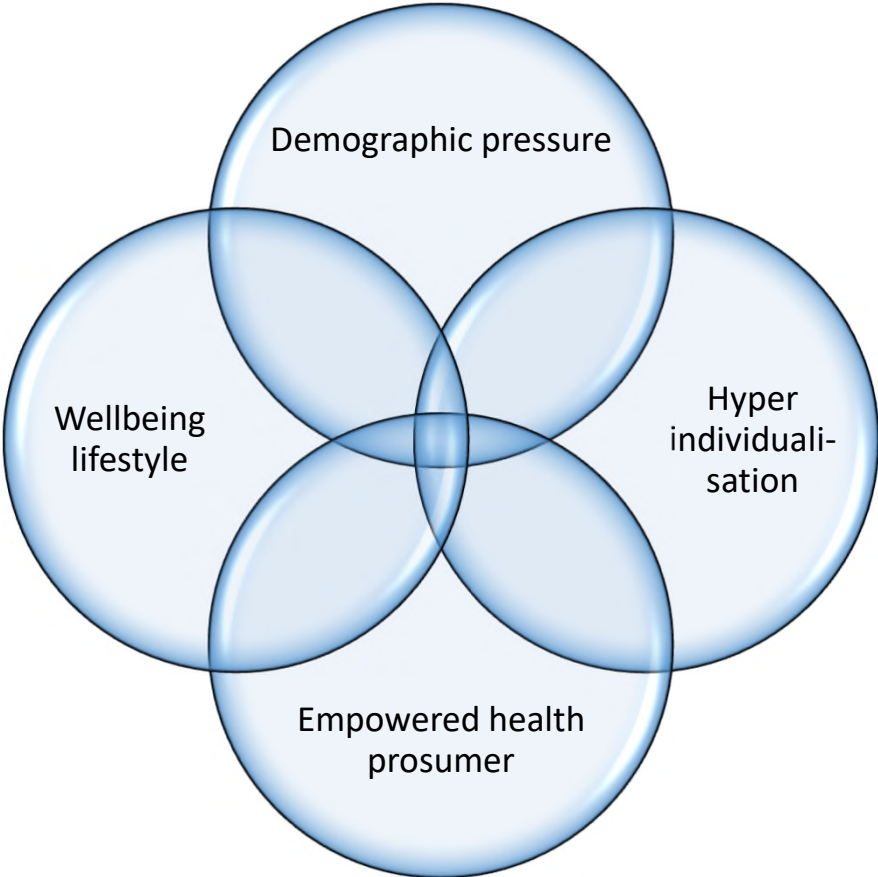
Society shaped by fear

Declining confidence in institutions & retreat into private bubbles



Key  
societal  
shifts

# Societal shifts reshaping healthcare demand



# Aging society

- **Aging**
  - By 2050, 2.1 billion people will be over 60
  - By 2050, nearly 30% of Europeans will be over 65
  - **Regional disparities** (Africa # OECD countries)... Fastest aging countries by 2050: Korea (40.1%) and Japan (37.7%) aged 65+
- Life expectancy at birth in the EU: 81.5 years in 2024
  - Women 84.1 years, men 78.9 years
- **Resource scarcity**: demographic shift will strain labour market, pensions and public health systems

Sources: UN, World Population Ageing 2023, Eurostat, OECD Health Statistics 2025



## Strategic implication I: the **chronic** society

- **Non-communicable diseases** (NCDs), such as cardiovascular diseases, cancers, chronic respiratory conditions, and diabetes, accounting for approximately 74% of all mortality (WHO 2023)
- **Multimorbidity**: dominant patient of the future is living with multiple long-term conditions
- Move from acute intervention to **lifelong disease management**

## Strategic implication II: healthy ageing

- Move **from treatment to prevention**
- Strategic goal: not just extending life, but preserving **quality of life** (mobility, cognition, independence)
- Early intervention and **healthspan focus**
  - From lifespan to *healthspan*

Demographic  
pressure

Longevity

Shift from curative  
medicine toward  
preventive,  
personalised, and  
data-driven health  
management

Hybrid offers combining age tech, regenerative medicine (e.g. stem cell therapies: rejuvenating tissues), medical diagnostics, AI, nutrition, sleep optimization, recovery, and healthy ageing

Biohacking & personalised health strategies

AI-supported analysis of biometric, genetic, and behavioral data



Hyper individualisation



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Hyper  
individualisation



# Changing societal logic

From the “logic of the general” → “logic of the particular”

(Andreas Reckwitz)



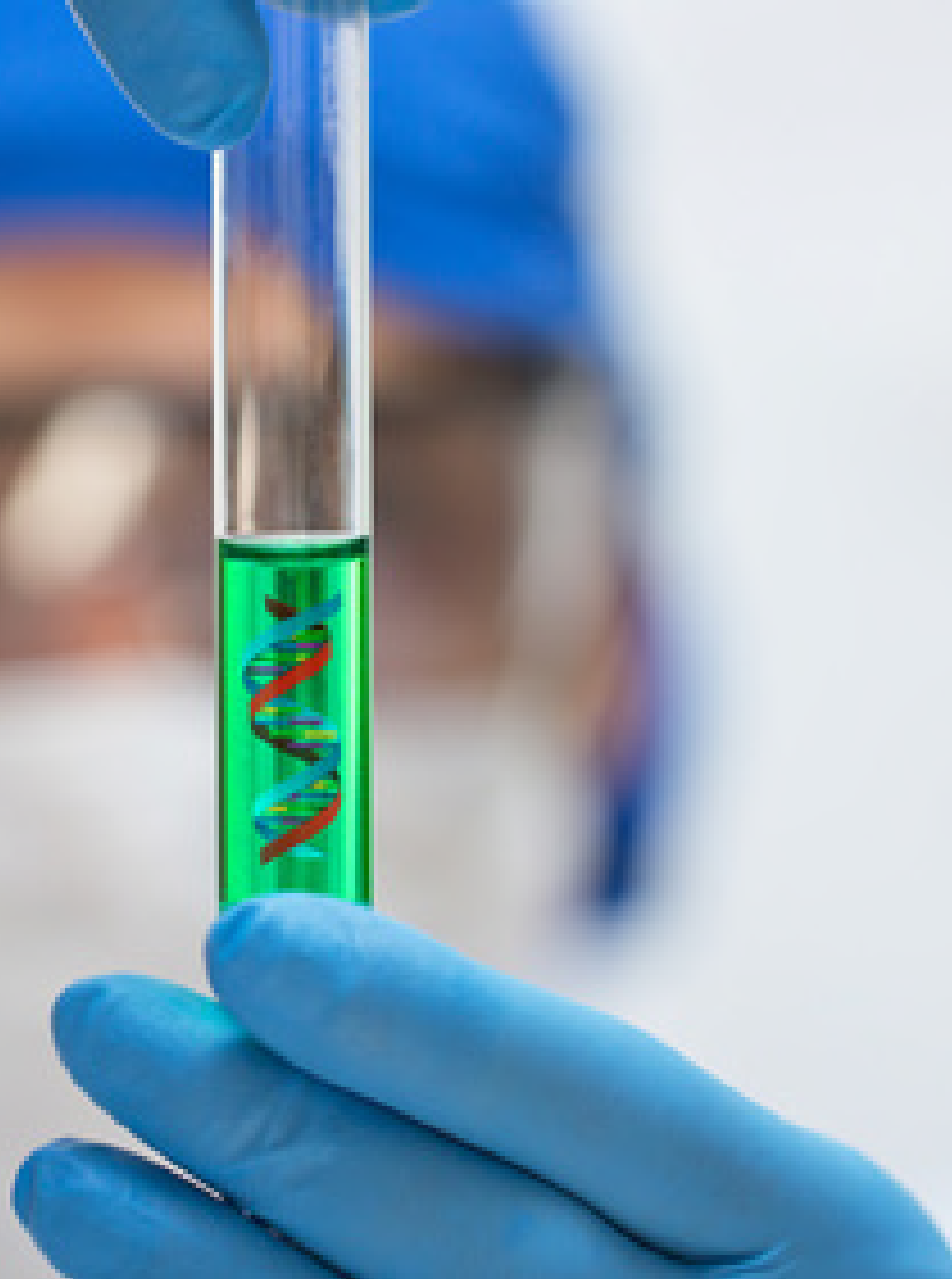
Hyper  
individualisation



## Future belongs to **diversity** & inclusive care

- **Gender equality** has become a societal norm — but lived health realities still differ between men and women
  - Women suffer from chronic stress, caused by structural inequality (pay gap, distribution of unpaid care work...)
  - Studies & treatment guidelines have been built around the *male* body
  - Differences in terms of biological factors and health-related behavior (e.g. preventive care, risk lifestyle, drug response etc.), but life expectancy gap men/women declined in most OECD-countries from 5.6 to 5.2 years
- The future is about inclusive care: **tailored to gender**, life situation, **social context**

Source: OECD Health Statistics 2025



## Strategic implication III: *personal* medicine

- Consumers expect personalised one-to-one experiences, patients expect recognition of their **individual biology** & **individualised therapies**
- Direct-to-consumer genetic testing
- AI is driving the rise of tailored healthcare, **hyper personalised-medicine** & **treatments**
- **Lifestyle medicine** as a cornerstone of preventive healthcare

- Patients are no longer passive recipients of care; they increasingly gather data, track metrics, research symptoms, compare options, and actively participate
- Health data is becoming part of personal identity

Health data as part of human identity

- **Well informed and demanding patients:** Over 60% of patients research symptoms online before seeing a doctor (Pew Research)
- **Connected IoT devices:** over 50 billion by 2035 (IoT Analytics)
- More than **500 million wearables** are in use globally, many of them **tracking health-related metrics** such as heart rate, sleep, and activity
- **Wearable Technology Market:**
  - Compound annual growth rate of 26.83% between 2025 – 2035 (Market Research Future)



26% of people perceive AI as a “digital companion”; among those under 30, the figure rises to 32%

11% can imagine AI replacing real romantic relationships

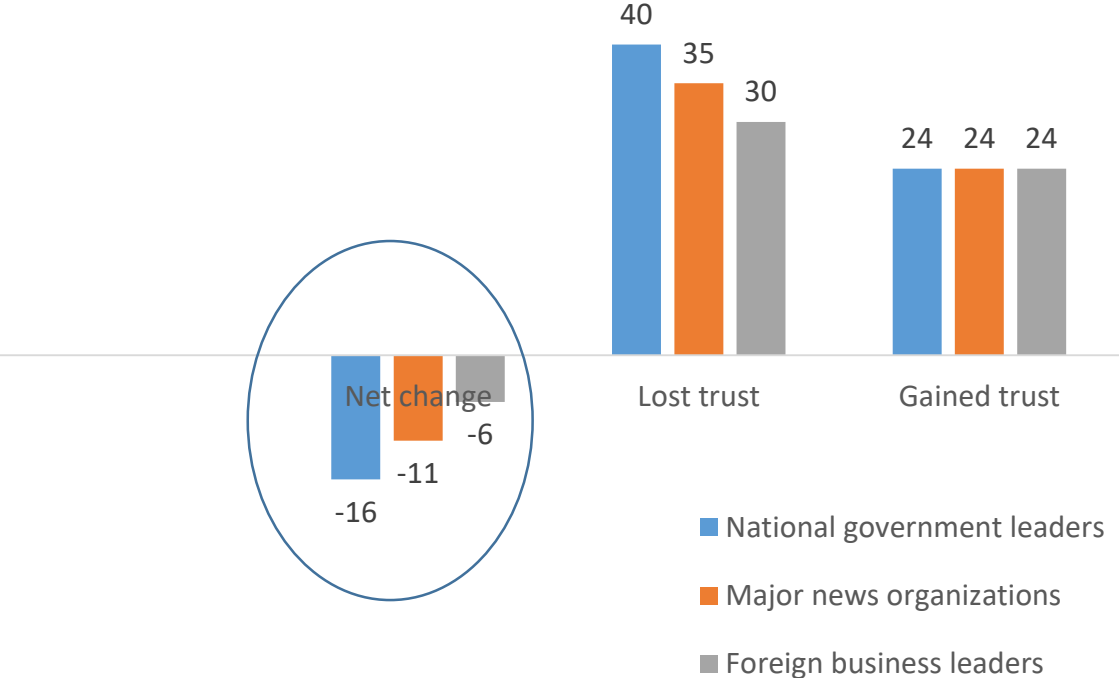
11% report feeling an “emotional attachment” to AI

Source: Bitkom Research (Germany), 2026

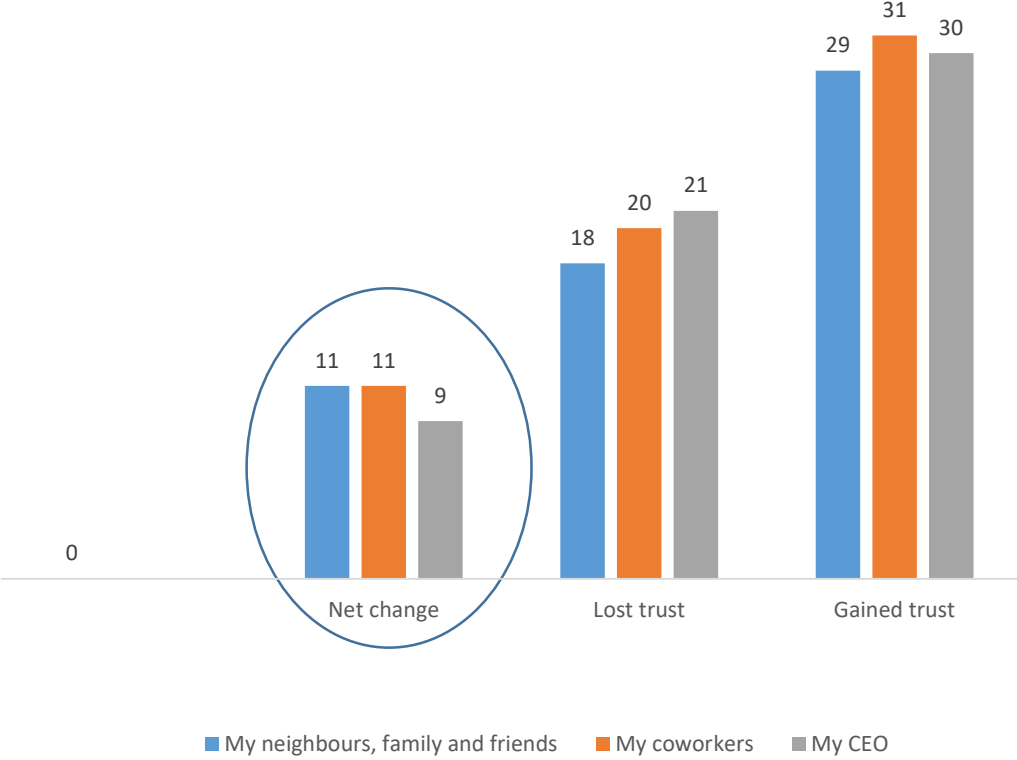
Deep cultural and psychological shift in relationship between humans & technology

People mainly trust their closest private and professional networks

I have lost trust (in the past 5 years)



I have gained trust (in the past 5 years)



In %, source: Edelman 2026 Trust Barometer



Trust is local: *My* doctor,  
*my* family / friends &  
*myself*

- Disruptive and complex world ➔ growing need for control and self-efficacy
- Complexity creates a powerful demand for control and self-efficacy
- 76% globally “confident in my ability to find trustworthy health information”
- 64% of next generations (18-34 years) consume health media on social platforms

Source: Edelman 2025 Trust Barometer Special Report Trust and Health



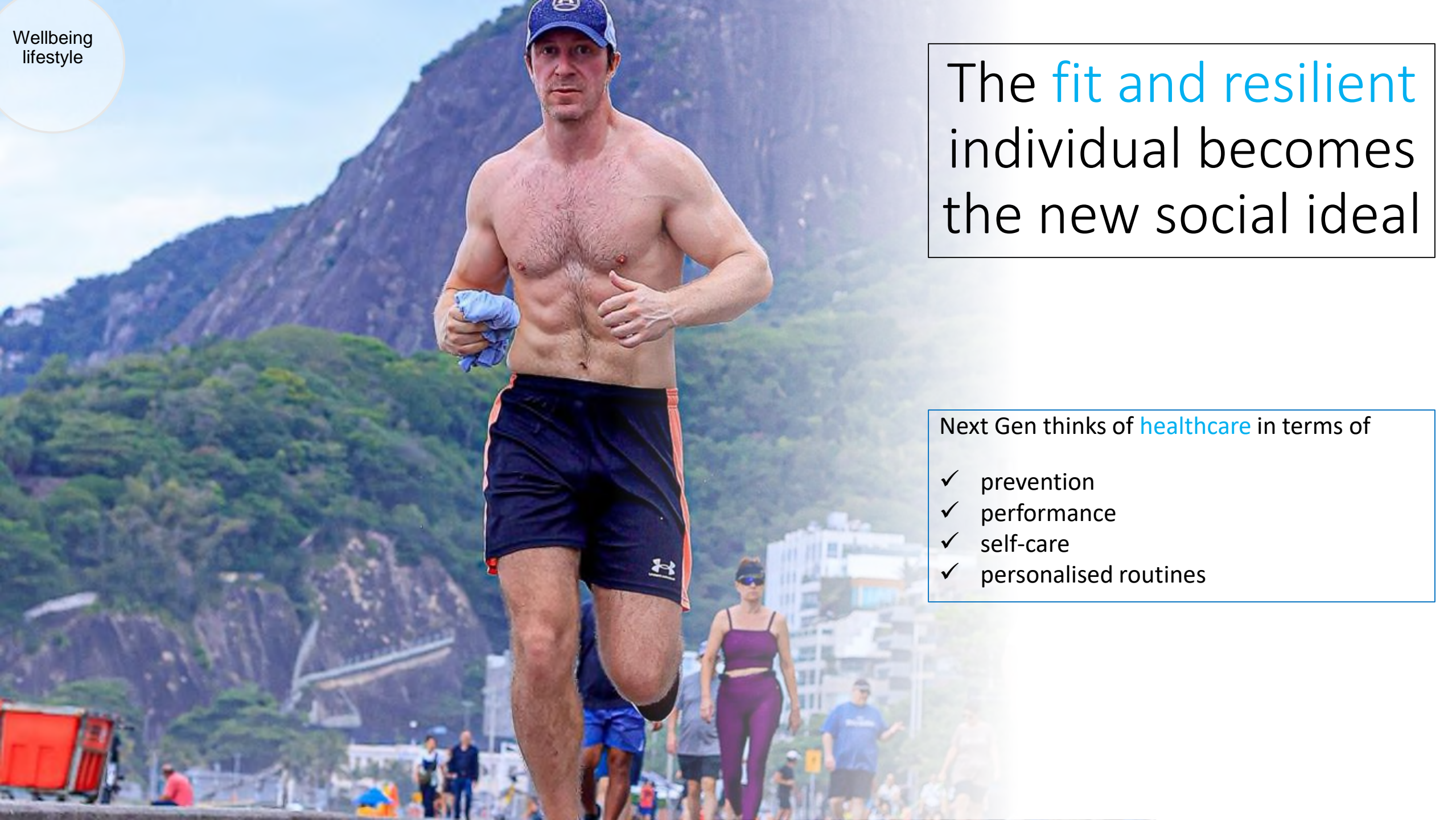
## Strategic implication IV: trust-centered care

- **Power shift** from institution to individual
- Remote lifestyle demands **remote services** (e.g. telemedicine)
- **Convenience** increases **virtual health care** and subscription models
- Medical excellence alone will not be enough; **trust architecture** becomes part of healthcare delivery



# Health is the new wealth

- Vitality as status symbol
- Body (and health) as part of personal branding
- Healthy lifestyles mark our identity (e.g. food choices, exercise routines etc.)



The **fit and resilient** individual becomes the new social ideal

Next Gen thinks of **healthcare** in terms of

- ✓ prevention
- ✓ performance
- ✓ self-care
- ✓ personalised routines



Health culture is aspirational, but  
**reality** remains **contradictory**

Overweight and obesity on the rise –  
increasing threat to developed and  
developing countries

Cardiovascular disease, diabetes, and  
musculoskeletal disorders

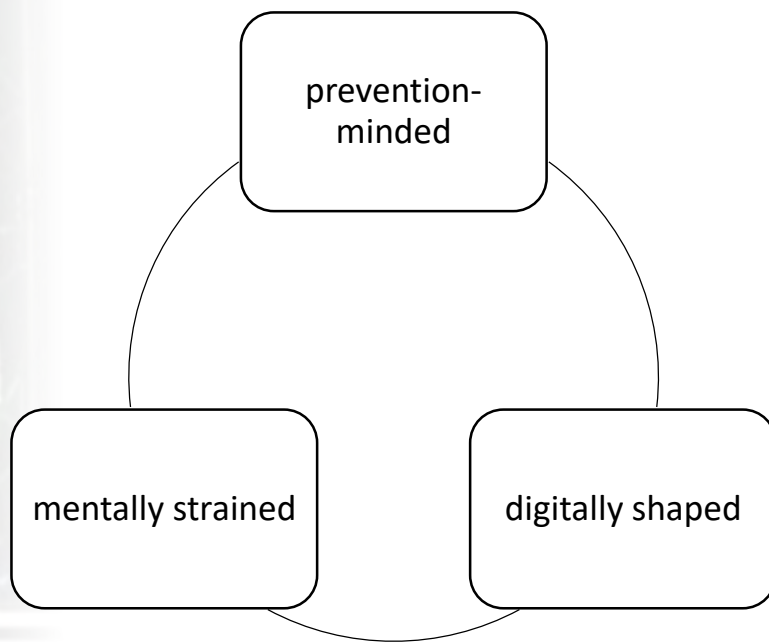
Mental health disorders and chronic sleep  
disorders

## Everyday consumption patterns

too much fat  
too much sugar  
too much salt



# Next generation as agents of change



# Mental health becomes defining pressure point

- Alarming picture: globally, nearly **one in seven people** lives with a **mental disorder** — around 1.1 billion people
- Particularly affected: **one in seven adolescents aged 10-19** experiences a **mental disorder**
- 47% of Gen Z rate their mental well-being as fair or poor
- **Loneliness**: around 1 in 6 people globally report feeling lonely

Sources: WHO/Institute for Health Metrics and Evaluation 2024, Deloitte Global 2025 Gen Z and Millennial Survey, WHO/Gallup World Poll 2025



**Resilience as guiding principle**

- Mental pressure → self-care, emotional wellbeing
- Health is understood not only as the absence of illness, but as the capacity to cope, recover, adapt, and remain functional under pressure.

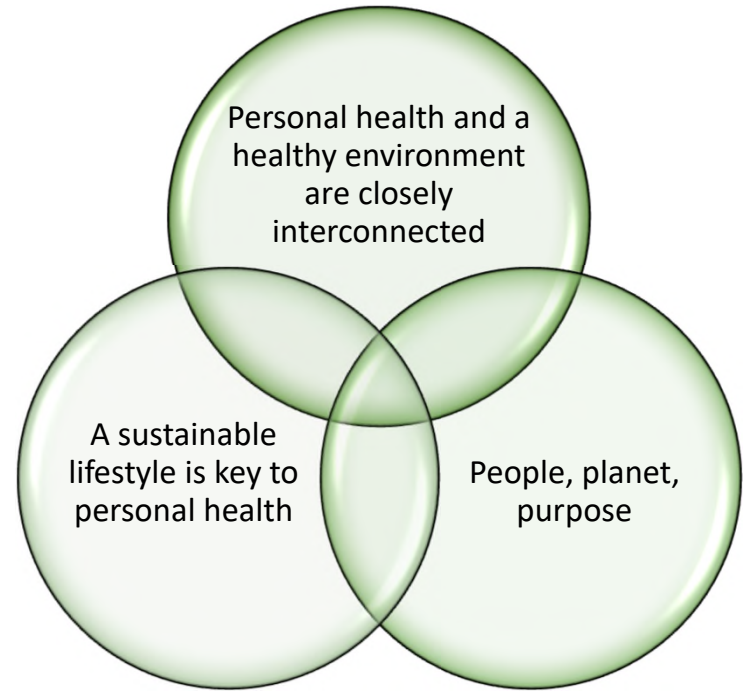
Holistic  
approach  
Healthy  
buildings,  
healthy people





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# One Health



Wellbeing  
lifestyle



© quinity/Fotolia.com



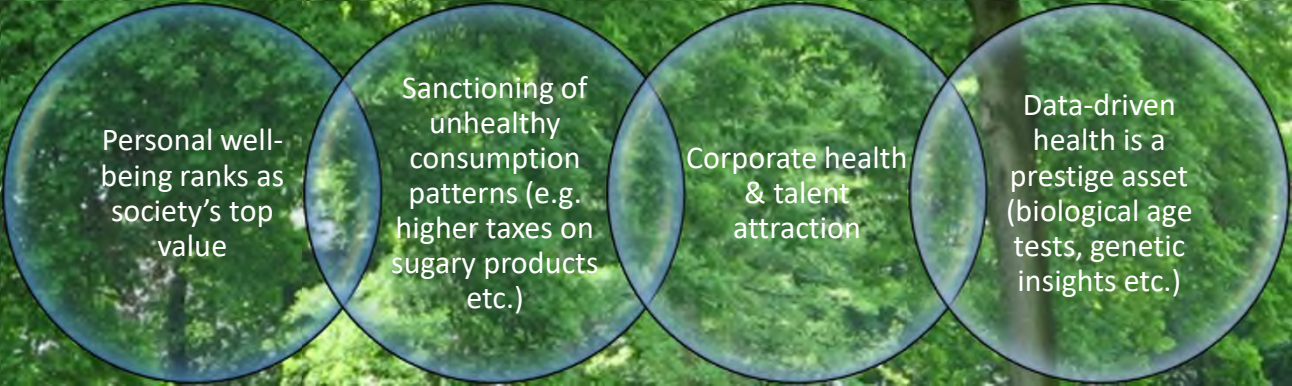
Multi-local  
working

Corporate health

Co-working =  
human & AI

Fluid society, fluid work: new patterns of stress, new time regimes, and new expectations toward accessibility in healthcare

© Outside society



Strategic implication V: healthy lifestyles as identity markers



Consequences

# Entering an age of structural instability

- Challenge: **adaptation under volatility**
- The relationship between people, technology and medicine is being fundamentally redefined
  - **Technology** as active **interface** of health
  - Healthcare systems can only build resilience through **interoperable** ecosystems



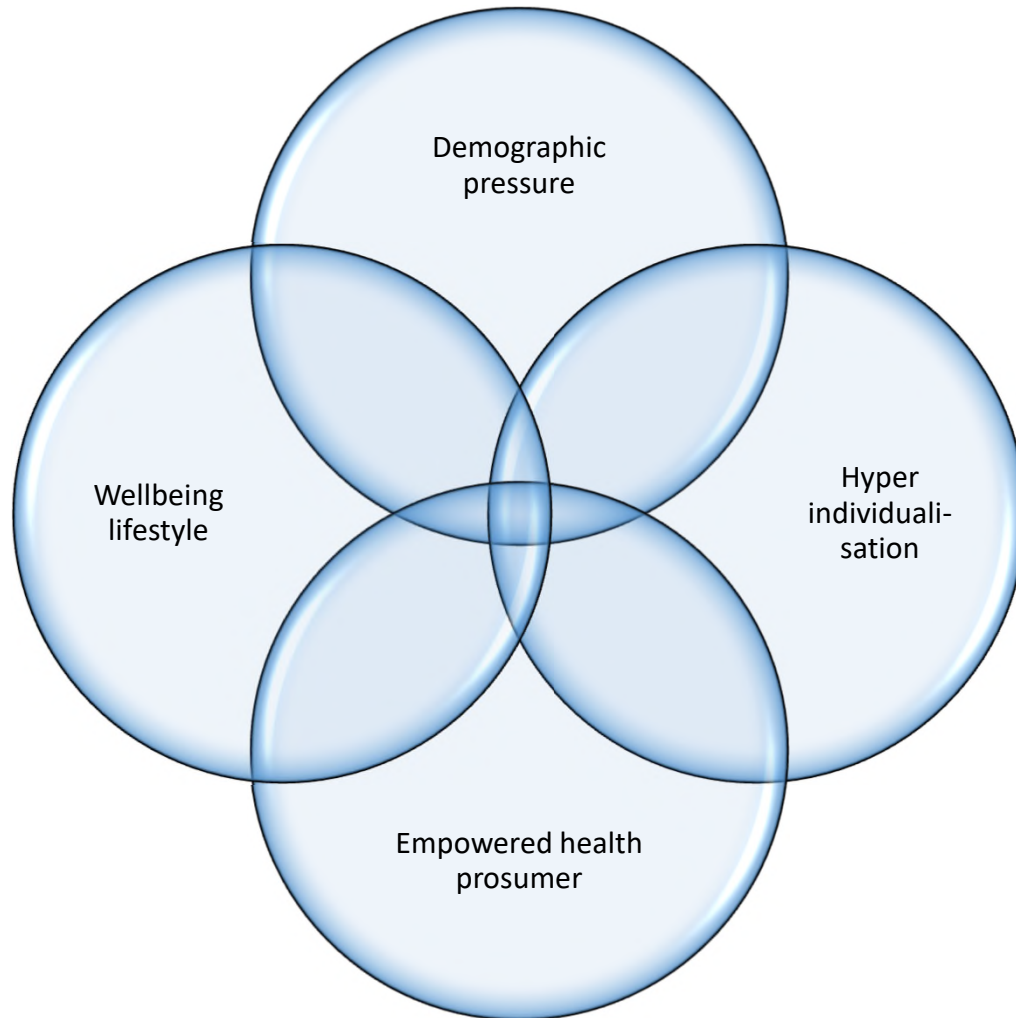
# Adaptive organisations

... combine scientific innovation with resilience architecture:

- scenario thinking
- flexible operating models
- ecosystem partnerships
- stronger risk intelligence



Major societal shifts are interlinked and mutually reinforcing





## Ageing society: redesign of healthcare demand

- Healthcare systems must reallocate resources upstream:
  - earlier screening
  - prevention
  - home-based support
  - integrated chronic care
  - age-friendly service design
- For pharma it means: **Whole person** care, innovating beyond single-disease silos toward **medication interactions** and **long-term treatment ecosystems**



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## Resilient companies: combining **scale** with **granularity**

- Age of standard healthcare is ending: **Personalised medicine**, AI-supported diagnostics, genetic insights and lifestyle medicine
- **Contextualised care**: segmenting not only by disease, but by life situation, behaviour etc.
- For pharma the future lies in **precision engagement**, adaptive service models, personalised prevention and patient communication

# New actor in healthcare: the health prosumer

- Cultural shift
  - People are increasingly guided by digital platforms, social media and Agentic AI tools guide health decisions ➔ **data governance** becomes strategic assets
  - **Digital resilience** as key factor of healthcare delivery
- Healthcare providers must move from one-way communication to **trust design**
  - transparent information, intuitive patient interfaces, credible digital companions, responsible AI
  - Legitimacy is earned by transparency and (peer) proximity
  - **Trust** will become a decisive **competitive advantage**



# Era of Convergence

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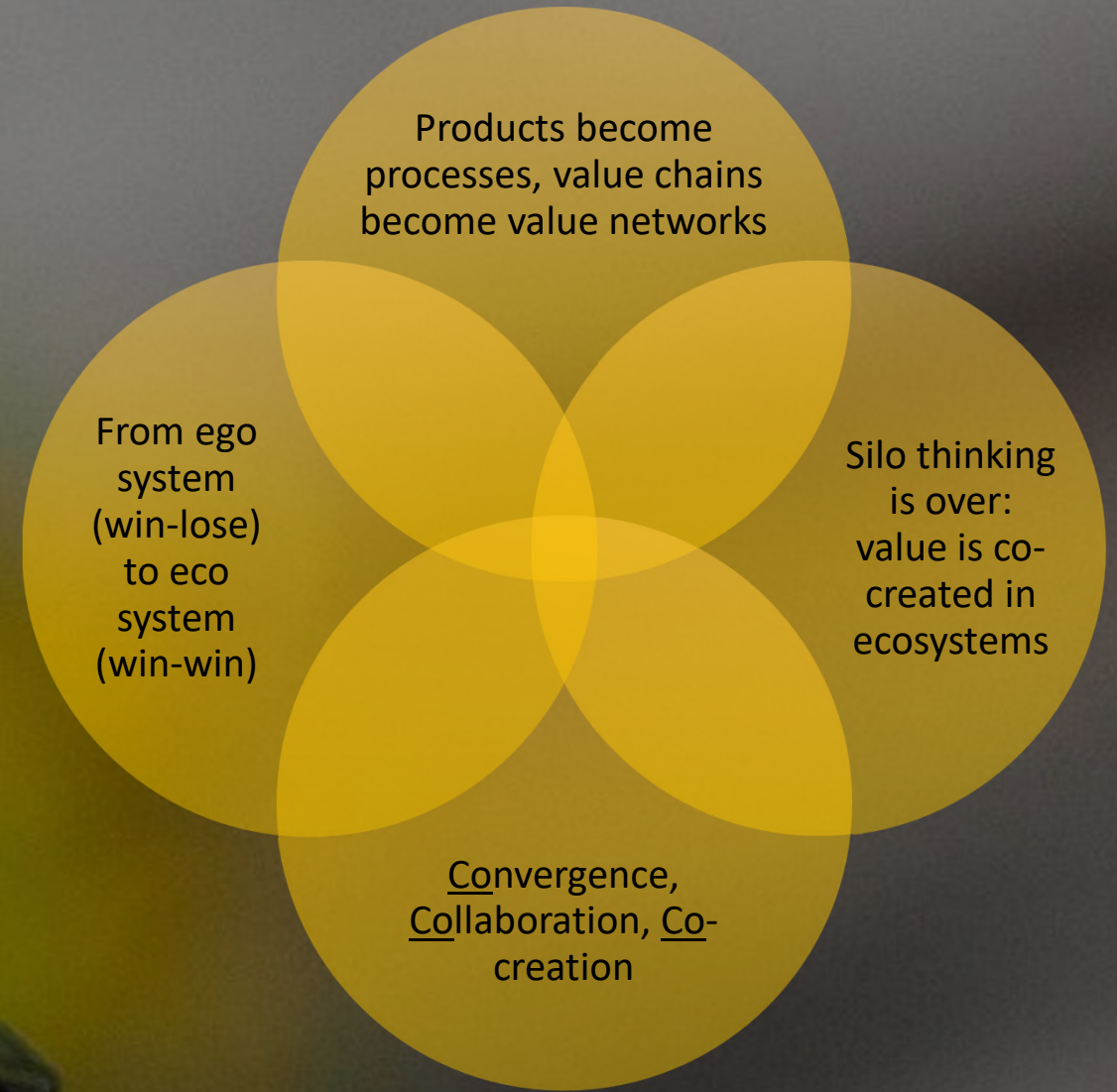
Dissolving boundary between healthcare and lifestyle, biotech and AI, genomics and cloud computing, clinical trials & digital twins, care delivery & consumer technology

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Systemic transformation: Future value creation will happen precisely in these intersections



# Building resilient ecosystems



“Our competitors aren’t taking our market share with devices; they are taking our market share with an entire ecosystem!”

Stephen Elop, CEO Nokia, 2011



## Five imperatives forming the operating system for future-ready healthcare

- Redesign care around chronicity and healthspan
- Personalise at scale
- Build trust by design
- Strengthen digital resilience and data governance
- Orchestrate ecosystems, not isolated products

