



---

## 8. Indications for the Future

Updated: December 2018

### **What is Japan Health Policy NOW?**

Created in 2015 by Health and Global Policy Institute (HGPI), Japan Health Policy NOW (JHPN) is the only centralized platform in the world on Japanese health policy available in both Japanese and English.

As the world's attention turns to Japan, one of the world's fastest ageing countries, there is increasing interest in Japanese health policy and a growing need to share information on Japan's health policy with the world. JHPN is committed to addressing this need by delivering factual information about the Japanese health system, Japanese health policy stories of interest, recent Japanese health policy news, and a resource list for those who want to learn more about Japanese health policy.

For more information, please see

<http://japanhpn.org/en/jhpn/>

## 8. Indications for the Future

As we move into the future, we can anticipate changes to continue in the healthcare arena. As described in the MHLW's Health Care 2035 report, the following core trends impacting Japan now and into the future are expected to drive the way for change into the future. These are: 1) demographic shifts, 2) accelerating urbanization, 3) disease structure, and 4) the increasing impact of technological change. Each of these will have different impacts on the healthcare system in Japan.

### **Demographic Shifts**

Let's start with demographic shifts. Globally, we are seeing the ageing of mature economies and population growth in development economies. In Japan, this demographic shift is visible in two specific ways – the ageing and decrease of the population, and the impact to healthcare will be dramatic. We will see changing medical needs with expenditure continuing to increase, and the proportionality of diseases will shift as the population ages.

### **Accelerating Urbanization**

At the same time, we will see the acceleration of urbanization. In Japan, this is apparent as only Tokyo and Kanagawa prefectures are growing at the time this piece is being written. Furthermore, while populations are amassing in on Tokyo, Kanagawa and Saitama they are declining in the more remote areas of Japan as of October 30, 2018. These demographic changes are driving a shift in delivery of care. In remote areas, where there are fewer facilities, the need for technical support and “remote care” technologies are growing.

### **Disease Structure**

In addition, as improved medical care drive changes in the disease structure, increasing the prevalence of diseases such as dementia and cancer, new approaches to community health are also emerging. This can take the form of interconnected patient data through new technologies such as cloud solutions which will allow for less in-hospital time and fewer healthcare workers. These changes will allow the elderly to stay at home longer before they are moved to nursing homes. But important challenges such as personal data privacy need to be overcome to develop the care delivery models of the future.

### **Technological Change**

Finally, we will continue to see dramatic impacts from technological change. We have seen the rise of social media and the emergence of cloud technologies. Topics like “big data” and “analytics” have become ubiquitous. These technological changes are expected to create new opportunities to drive efficiencies in how healthcare is provided. A series of “new entrants” as diverse as technology companies, car manufacturers, communications companies and others are beginning to enter the market to take advantage of these opportunities and help drive change in healthcare. As a result, we are seeing a digital transformation of our healthcare system. With some of these technologies, how we handle our healthcare will be very different in the future. For example, imagine the impact of connecting apps on our phones with pharmacy information with our historical health information – including genetics and familial tendencies. If these can be done in a way that addresses privacy and security, a patient could visit any hospital in Japan and not need to repeat tests or face differing opinions. Based on these trends, we can imagine dramatic changes coming in healthcare in Japan. They will be impacted by outside forces and regulated in the market through the government.

**Conclusion**

We hope you have found this document a resource for your education and reference on the Japanese healthcare system. HGPI endeavors to update this every few years as regulations evolve and trends impact the healthcare system and cause change.