# Top trends to watch in Health

Read on for CGI client insights on how to accelerate your digital journey toward a people-centric, integrated health ecosystem

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# Putting people at the center

### Impact of macro trends

Technology and digital acceleration due to rising citizen and customer digital expectations is the highest impact macro trend for health clients in 2022, followed by changing social demographics, including aging populations and talent shortages. More health executives cite these trends than the average across industries.

The COVID-19 pandemic accelerated digitization and acceptance of virtual delivery. Both patients and providers have a greater comfort level, but there is uncertainty as to whether relaxed regulations for telemedicine may revert to previous requirements.

### Top of mind for clients

Across health trends and priorities, the customer and patient experience rises in importance as the industry moves to make health systems more human-centric. Notably, collaborating across organizational boundaries rises as a business priority, reflecting the importance of continuity of care and bridging silos in health systems to create service ecosystems, including social care. There is growing recognition of the need to consider social determinants of health in ensuring equity in access and quality of care. Health reform also remains a top trend in this heavily regulated industry.

This year, 28% of executives say they are producing expected results from digital strategies, now above the all-industry average of 25%, evidencing that pandemic-driven digital acceleration has taken hold.

Harnessing data for business and clinical insights stays in focus, with ever-increasing volumes to manage and opportunities to grow the use of data to improve outcomes.

Cybersecurity and data privacy protection continue as top concerns. In light of ransomware attacks and exposures of personal health information, there is greater urgency to protect the confidentiality, integrity and availability of health information.

## About the insights

Each year, we meet with client executives from around the world to get their views on the trends affecting their organizations and industries. Through the CGI Voice of Our Clients, we analyze these findings to provide actionable insights by industry to benchmark best practices, including the attributes of digital leaders.

In 2022, we met with 1,675 business and IT executives. **This summary report shares sample insights from 69 health client executives.**

### Interview demographics

Business leaders 41%    59% IT leaders

C-level 58%    44% Ops-level
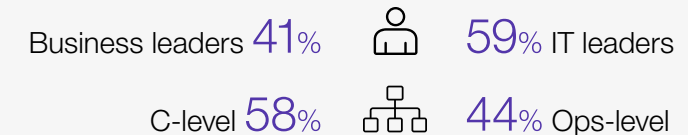
# Top trends & priorities

Digitization to improve the customer and patient experience, along with data and security, remain in focus.

> **Key takeaway**

Collaborating across the larger health ecosystem becomes increasingly important.

| | Top industry trends | Top business priorities | Top IT priorities |
|---|---|---|---|
| **1** | Becoming digital organizations to meet customer / citizen expectations | Improve customer experience through compliance to treatment guidance and supporting the patient at home | Improve the patient experience and reduce costs by digitizing and automating healthcare |
| **2** | Protecting data and equipment through cyber privacy and cybersecurity | Collaborate across the boundaries of our organization to deliver interoperability | Protect data and assets through cyber privacy and cybersecurity |
| **3** | Budget pressures due to aging populations | Optimize today's operations | Drive IT modernization and new IT delivery models |

The industry trends capture key drivers with the greatest impact on the clients' industry. The business priorities represent how clients are addressing the industry trends, and the IT priorities reflect the technology areas of focus to address the trends and achieve the business priorities.

# Digital progress in Health

Over the past 4 years, health clients have progressed markedly in achieving expected results from digital strategies, rising to 28% today, or more than 4 times the measure from 2019, and above the all-industry average of 25%.
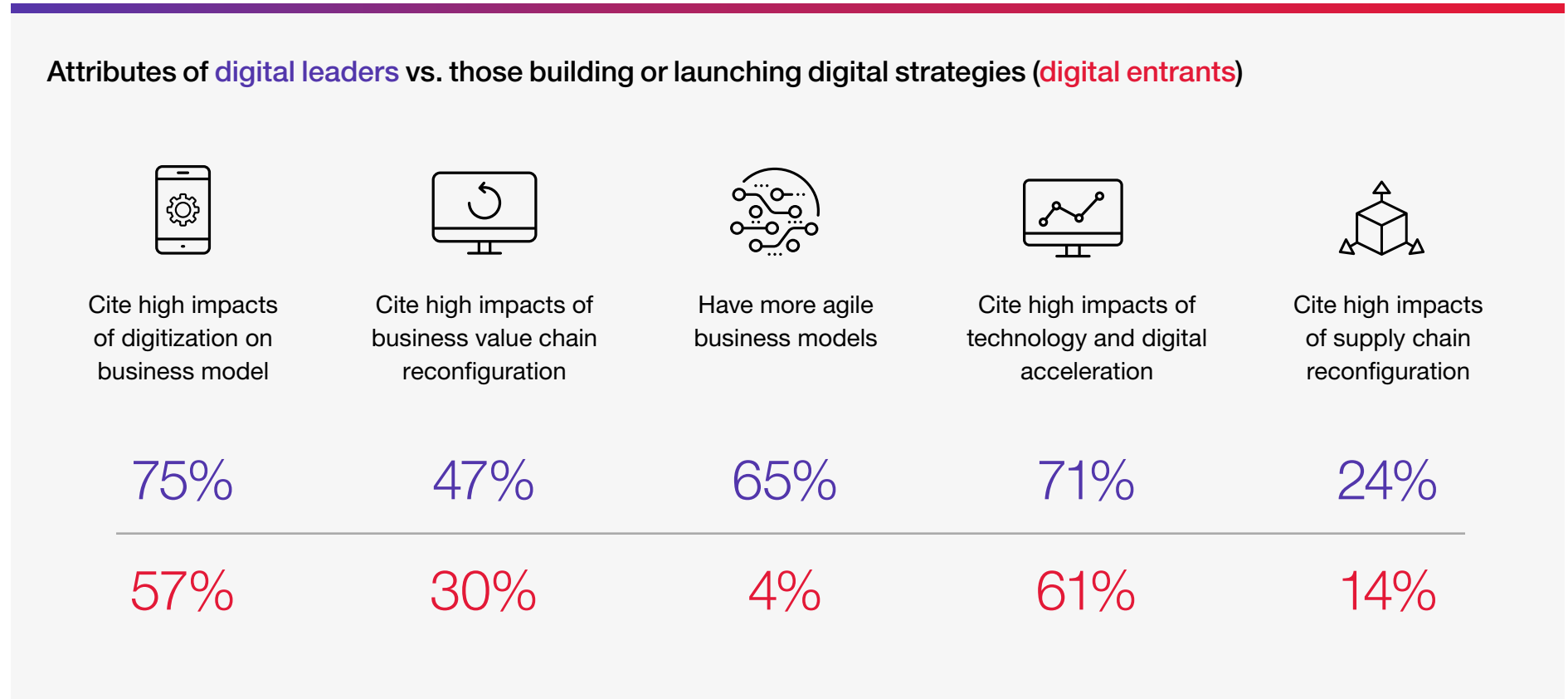
**Nearly 1 in 3 executives say implementing digital strategies is made challenging by legacy systems.**

**Executives who say their organizations are producing expected results from digital strategies**

| 6% | 14% | 20% | 28% |
| --- | --- | --- | --- |
| 2019 | 2020 | 2021 | 2022 |

# Digital leaders in Health

In examining the 28% producing results from digital strategies, who are digital leaders, some common attributes emerge.

The table compares responses to questions from the digital leaders to those from executives whose organizations are still building or launching digital strategies, or digital entrants.

**Attributes of digital leaders vs. those building or launching digital strategies (digital entrants)**

| Cite high impacts of digitization on business model | Cite high impacts of business value chain reconfiguration | Have more agile business models | Cite high impacts of technology and digital acceleration | Cite high impacts of supply chain reconfiguration |
|---|---|---|---|---|
| 75% | 47% | 65% | 71% | 24% |
| 57% | 30% | 4% | 61% | 14% |

# Key findings from our interviews with Health executives

## 1.

**Digitization is vital to patient-centricity.**

Improving the customer and patient experience is the top trend, demonstrating that business and IT priorities are once again aligned. More executives (28%) report they are producing results from digitization strategies. This is 2X as many as in 2020.

## 2.

**Collaboration to deliver interoperability rises in impact.**

Collaborating across the boundaries of the organization to deliver interoperability rises in impact ranking as a business priority, from third to second this year.

## 3.

**Digital leaders are more aware of business model impacts.**

75% of digital leaders say digitization is impacting their business model, compared to 57% of digital entrants.

## 4.

**Cybersecurity and privacy sharpen in focus.**

Cybersecurity and cyberprivacy rise in impact as an IT priority, from fifth to second. At the same time, 62% of executives say they have a cyber strategy in place for the enterprise; another 28% say that strategy extends to the external ecosystem.

## 5.

**Health reform driving compliance is a constant.**

Health reform driving regulatory compliance continues as a top-five trend, as it has been for the past 5 years.

# 6.

## Achieving priorities takes a focus on people.

Cultural change and change management is the top constraint to achieving business priorities, according to 72% of health executives.

# 7.

## Agility is a hallmark of digital leaders.

30% of health executives say their business model is highly agile for digitization. When it comes to digital leaders, the number rises to 65%.

# 8.

## Need for data and analytics continues.

Harnessing data analytics to improve health outcomes continues to be in the top-five business and IT priorities.

# 9.

## Executives cite impacts of business value chain reconfiguration.

75% of European executives cite medium to high impacts of business value chain reconfiguration (including business and operating model evolution). Across all regions, this number is 68%.

# 10.

## Majority see rising IT budgets.

Health executives anticipate higher budgets than the all-industries average. North American budgets are more aggressive than for their European counterparts.

# 5 recommendations for staying relevant for the future

## 1. Continue to focus on the patient experience.

The focus on the patient experience continues. We see digitization as a key to coordinating the changing health ecosystem, with mobile technologies supporting the individual patient as well as the health workforce. Healthcare providers will transform in using clinical technology, AI and IoT to improve the quality of service to patients and to compensate for talent shortages. They must innovate to deal with elective backlogs and shift the balance of care into the home by creating virtual hospital-at-home capabilities at scale.

## 2. Pursue a holistic, connected ecosystem.

Providing quality across the continuum of care increasingly is moving out of hospitals and into the home. Some governments are lifting overly rigid procurement processes and enabling more collaboration with the for-profit and not-for-profit private sector to create new human-centered pathways. This requires digital technologies and databases which, through interoperability, will enable care delivery where needed. Notably, 57% of health clients use open standards for technology compatibility. The goal is sharing multiple data sources in a people-centric, fully integrated ecosystem. This includes life sciences, which increasingly interacts directly with patients, as well as social services, given the importance of social determinants of health in coordinating other elements of care.

## Case in point

**Enabling transformation of health and care service for an NHS Trust**

To provide a positive, safe and reliable experience to patients, staff and partners, an NHS Foundation Trust selected CGI to identify requirements and develop an Electronic Patient Record (EPR) Strategy and Strategic Outline Business Case. We are helping the new integrated care organization understand their requirements, and the needs of the organization, staff and patients, and bringing that insight together to support the development of the business case to procure a new EPR that will underpin future transformation.

# 3. Integrate social determinants of health for better outcomes.

It's vital to focus on using technology to close disparities for underserved populations. Researchers believe social determinants of health (SDoH) drive more than 80% of health outcomes. Medical care is estimated to account for only 10-20% of the modifiable contributors to improved health outcomes. Individuals spend less than 1/10th of 1% of their time in the doctor's office, and what happens there only impacts 20% of their health outcome. Integrating SDoH data is key to understanding interrelationships to enable more efficient support to patients and greater innovation in care delivery.

# 4. Maximize technology use for greater efficiency.

Driving down costs through optimization remains critical in health. The evolution of automation, AI, cloud and agile processes enables organizations to do more with what they already have. Combined with the power of data, these technologies help organizations improve clinical and care decision making and create capacity to deliver better outcomes for patients, their families and the workforce. As recommended last year, health can look to other sectors for best practices, especially those that have been through significant digital transformation already to an "always on" and "self-serve" culture, like retail, banking and insurance.



## Case in point

**Seamlessly sharing patient data to free up clinicians' time**

The effectiveness of healthcare requires data that is easy to use and quickly available. Data also enables development of completely new treatments, medicines and prognostic models. Developed in cooperation with doctors and other medical experts, CGI's OMNI360 helps health systems seamlessly share and manage patient and customer data across organizational boundaries. This solution helped a large Finnish hospital improve data access, freeing up 80,000 hours for clinical work, annually.

## 5. Connect security and data privacy from end to end.

Cyberprivacy and security are essential for trust. From modernizing IT to improving supply chain integrity to the private communications between patient and provider, security and privacy continue to require continuous learning and maturation. Additionally, as health organizations look to smart city initiatives, if there is a digital back bone in a region, connecting secure and reliable networks to the home requires the ability to move sensitive data from the home and personal wearable devices to enable healthcare anywhere, at any time.

## Read more about the 2022 CGI Voice of Our Clients insights:

> What digital leaders do to accelerate results

> Impacts of macroeconomic trends



## Case in point

**Improving mental healthcare delivery through ePrescribing**

For a consortium of the UK's National Health Service (NHS) trusts, led by the South London and Maudsley NHS Foundation Trust, CGI is rolling out an e-prescribing and medicines administration (ePMA) solution, Better Meds, delivered in partnership with Better UK. The framework will increase patient safety while encouraging a higher quality of care.

# Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world. We are insights-driven and outcome-based to help accelerate returns on your IT and business investments. Our insights represent deep knowledge of industry trends and your business and IT priorities.

For the latest CGI Voice of Our Clients industry insights, and to consult with one of our experts, please contact us.

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