The 7th annual Industry Pulse research offers insights into recent and operational priorities for healthcare leaders for the coming year.

The Industry Pulse Research survey was completed in partnership with HCEG. Statistics based on survey responses (October, 2016) from over 100 healthcare executives and thought leaders.

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**INDUSTRY PULSE RESEARCH**

**INDUSTRY RESPONSE**

The impact of clinical and data analytics on health outcomes has been modest or slightly effective (room to improve, sophisticate, and innovate).

**METHODS FOR MEMBER RISK MANAGEMENT**

While the vast majority of respondents control risk through disease management... alternate payment models are gaining steam.

**PUBLIC EXCHANGE**

Confidence in the public marketplace as a productive sales channel declined 20 percentage points or a 56% drop between 2015 and 2016.

**ACCESS TO HEALTH**

Reportedly telehealth will be the top means of improving access to care.

**DIGITAL HEALTH**

Healthcare leaders see optimism for the future impact of digital health technologies.

**COST TRANSPARENCY**

When asked to prioritize, Cost Transparency was seen as the priority over Quality Transparency.

**CYBERSECURITY**

Top four drivers of cybersecurity concerns:

<table>
<thead>
<tr>
<th>Concern</th>
<th>Probability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Identity Theft</td>
<td>38.8%</td>
</tr>
<tr>
<td>Compromised HIE</td>
<td>38.8%</td>
</tr>
<tr>
<td>Increase in outsourced and third-party systems</td>
<td>38.8%</td>
</tr>
<tr>
<td>Poor Network Security</td>
<td>31.8%</td>
</tr>
</tbody>
</table>

**VALUE-BASED CARE SYSTEM**

**GOAL**

Market Differentiation: Triple Aim

- Improving the Patient Experience
- Improving the Health of the Population
- Reducing the Per-Capita Cost of Healthcare

**ENABLING SMARTER HEALTHCARE**

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