

The 7th annual Industry Pulse research offers insight into strategic 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.

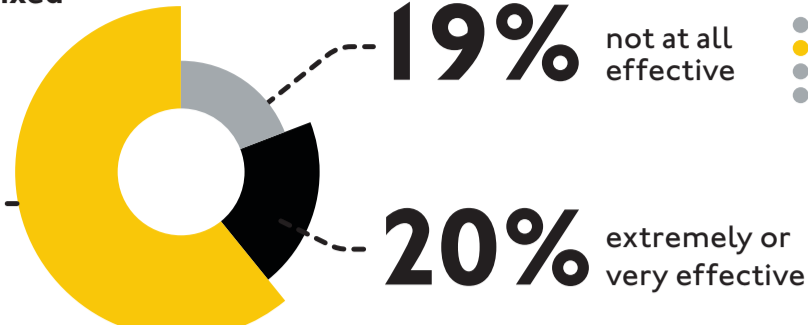
**INDUSTRY RESPONSE**

The impact of clinical and data analytics on health outcomes has been mixed



**61%**

moderately or slightly effective (room to improve, sophisticate, and innovate)



**METHODS FOR MEMBER RISK MANAGEMENT**

Note: respondents could select all that applied

**65.8%**

While the vast majority of respondents control risk through disease management ...



... alternate payment models are gaining steam

**47.8%** value-based payments



**45.1%** bundled payments



**PUBLIC EXCHANGE**

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

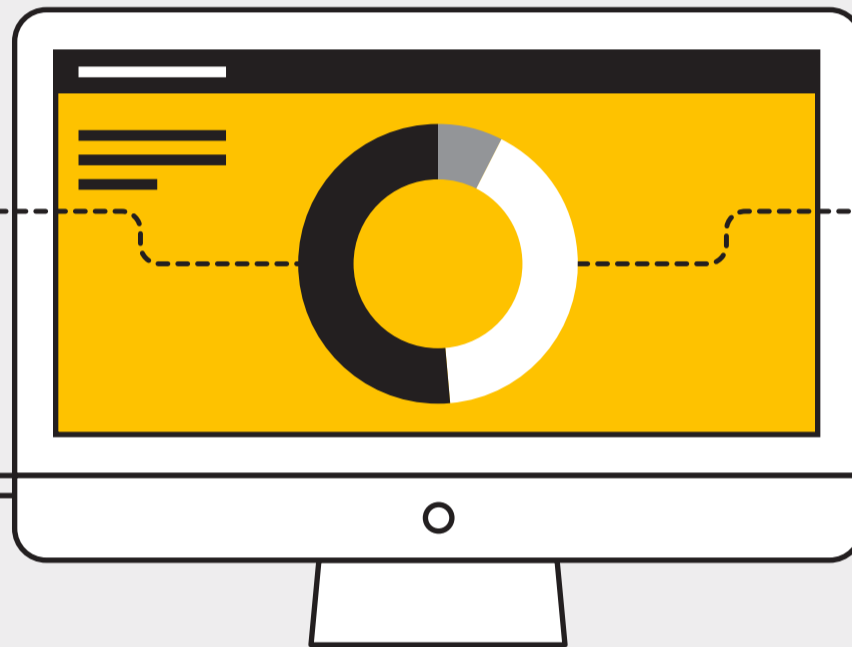


**ACCESS TO HEALTH**

Note: respondents could select their top three responses

**51.6%**

reported telehealth will be the top means of improving access to care

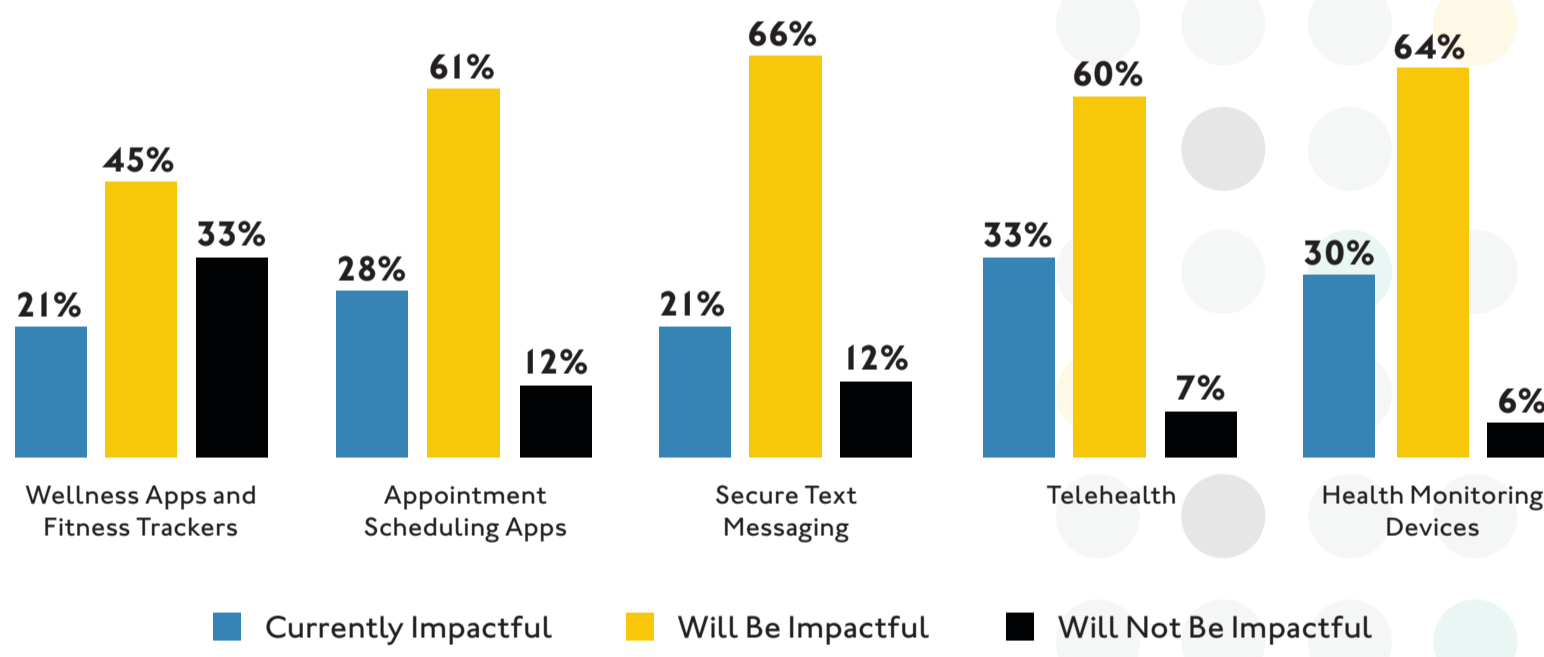


**41%**

reported that more Primary Care Physicians (PCPs) are needed to improve access to care

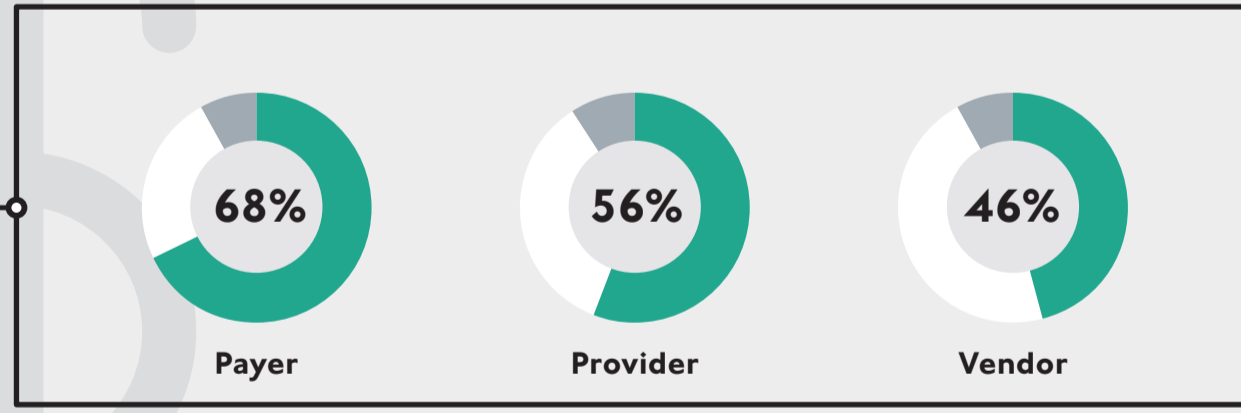
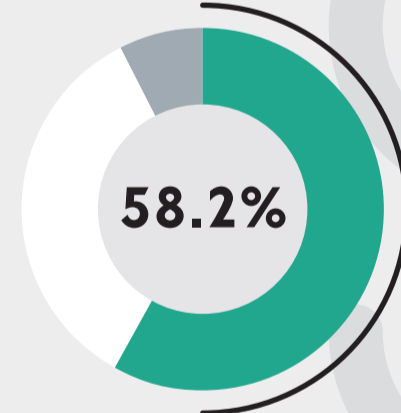
**DIGITAL HEALTH**

Healthcare leaders are optimistic for the future impact of digital health technologies



**COST TRANSPARENCY**

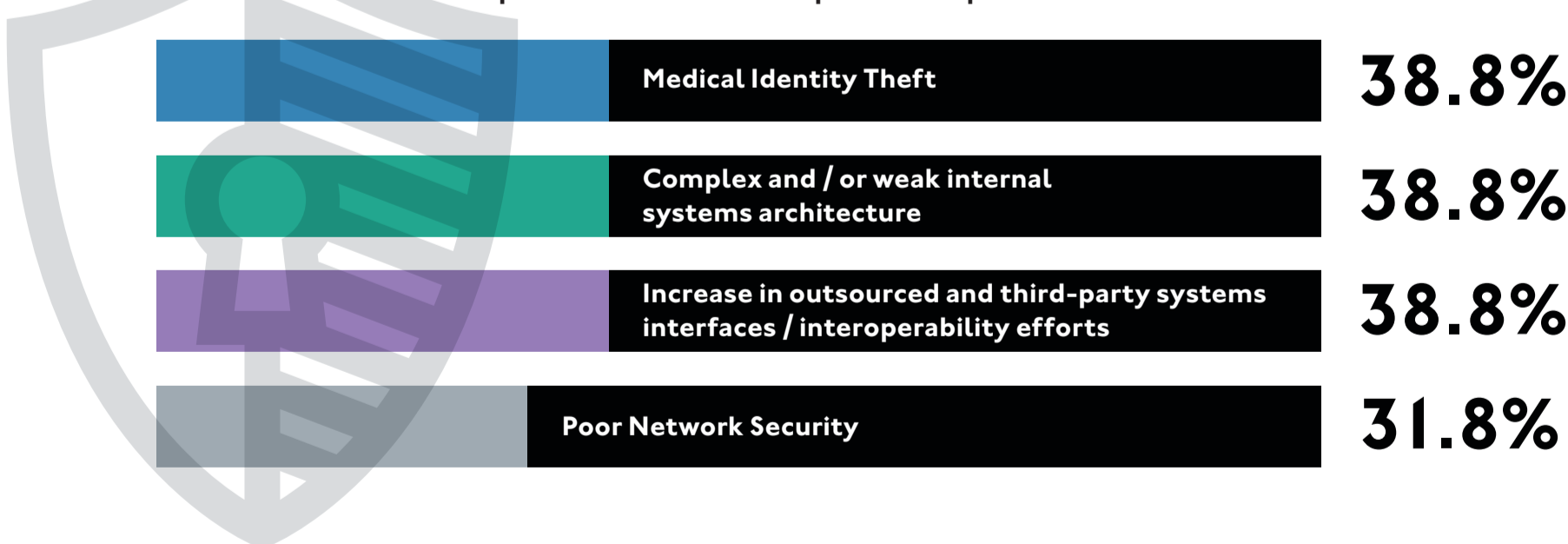
When asked to prioritize, Cost Transparency was seen as the priority over Quality Transparency



Legend: Cost Transparency (Green), Quality Transparency (White), Neither (Grey)

**CYBERSECURITY**

Top four drivers of cybersecurity concerns. Note: Respondents could select up to three options



**VALUE-BASED CARE SYSTEM**

Barriers to Overcome to Achieve Triple Aim

Opportunities to Improve: Care Quality + Consumer Engagement

Regulation

Cost

Security

Data

GOAL

Market Differentiation + Triple Aim

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

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