



# Healthcare Insights Summary North America

Each year, we meet with client executives to get their views on the trends affecting their organizations and industries. Through the CGI Client Global Insights, we analyze these findings to provide a valuable global antenna by industry—based on facts, not hype—to benchmark best practices. This summary shares sample insights from our healthcare client executives.

## **Customer needs and patient experience still dominate.**

Becoming digital for customers/citizens is the top trend by impact once again in 2020 globally and in North America as well. The most important business and IT priorities of optimizing operations and improving the patient experience, respectively, also stayed the same.

### > Top trend by impact

## Becoming digital to meet customer/citizen expectations

### > Top business priority by importance

## Optimize today's operations

### > Top IT priority by importance

## Improve the patient experience





> **Post-pandemic declaration trends show drop in becoming digital, rise in cybersecurity.**

When comparing interviews before and after the pandemic declaration by the World Health Organization (WHO) on March 11, 2020, becoming digital as a trend lessens in impact (-18%) while cyber (+16%), compared to earlier interviews.

> **Interoperability continues to grow in impact year-over-year.**

**79** % of executives cite interoperability and standards as a top trend (third highest by impact, up from fifth in 2019); 90% of payers cite it as a top trend.

> **Culture, not technology, is the biggest barrier to transformation.**

**88** % cite cultural and change management as the biggest challenge to implementing digital strategies, up from 71% in 2019.

> **Spending will grow slightly this year.**

**50** % plan to increase their overall IT spend, with 50% expecting an increase of greater than 10%. While only 22% will increase their spending in Operations and Maintenance, 58% of the executives mentioned they will increase their spending in new Applications and Investments.

> **Integration/interoperability and analytics are top innovation investment areas.**

**93** % plan to invest in integration and interoperability innovation in the next 3 years compared to 81% in Europe. Innovation investment in data analytics to support precision medicine and safer care is mentioned more frequently by North American executives (85%) than their European counterparts (77%).

> **Analytics is the new top digitization initiative.**

**96** % say analytics is their top digital transformation initiative (up from 91% in 2019), now ahead of improving the client and employee experience through digital and mobile strategies (81%, down from 88% in 2019).

> **Results from digital strategies increase slowly.**

**86** % report their organizations have a digital strategy at the ecosystem, enterprise or department level, with only 3% producing results.

Learn more at [cgi.com/client-global-insights](https://cgi.com/client-global-insights).

For a complete set of industry insights and to consult with one of our experts, contact us at [info@cgi.com](mailto:info@cgi.com).

**Key takeaways for the Health industry in Canada**

- Healthcare is evolving to focus on the patient journey.
- Modernization and optimization of a system in response to patient needs.
- Less of a focus on “smart” solutions as opposed to “connected” solutions – i.e. connected within a community.
- Growing use of Analytics to improve patient and client experience.
- High potential of the data and the necessity to exploit it correctly. For several jurisdictions across Canada, quality and governance of the data is an issue.

## About the insights

In 2020, we met with 1,447 business and IT executives. This summary shares sample insights from 66 healthcare executives, including 29 from North America, across the provider (50%), payer (18%) and government healthcare (32%) sectors.

Interviews were conducted before and after the pandemic declaration, providing unique insights into evolving priorities.

### Interview demographics in North America

Business leaders

IT leaders



## HEALTHCARE IN CANADA

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By partnering with the healthcare sector, CGI helps improve health outcomes for Canadians across the continuum of care. We are a local, longstanding partner with global consulting expertise in operational efficiency, strategic planning, and health data analytics.