



2020 CGI CLIENT
GLOBAL INSIGHTS

Healthcare Insights Summary

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. 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 interoperability**

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 (-19%) while interoperability rises (+15%), compared to earlier interviews.

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

86 % of executives cite interoperability and standards as a top trend (third highest by impact, up from fifth in 2019); 92% of payers cite it as a top trend (rising to 3rd from 6th in impact versus 2019).

> **Results from digital strategies increase**

86 % report their organizations have a digital strategy at the ecosystem, enterprise or department level, with 14% producing results—up from 83% and 6%, respectively, in 2019.

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

89 % cite cultural and change management as the biggest challenge to implementing digital strategies, up from 86% in 2019.

> **Most executives are planning to increase IT spending**

70 % plan to increase their overall IT spend, with 37% expecting an increase of greater than 10%. (Some budget data was collected prior to the pandemic declaration, so may be subject to change.)

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

81 % plan to invest in integration and interoperability innovation in the next 3 years. In North America, 93% say this 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**

91 % say analytics is their top digital transformation initiative (up from 87% in 2019), now ahead of improving the client and employee experience through digital and mobile strategies (83%, down from 92% in 2019).

Learn more at 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.

About the insights

In 2020, we met with 1,447 business and IT executives. This summary shares sample insights from 66 healthcare executives 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

Pre March 11*	Post
59%	41%
Business leaders	IT leaders
44%	56%
Europe	North America
56%	44%
C-level	Ops-level
65%	35%

*Pandemic declaration by WHO