

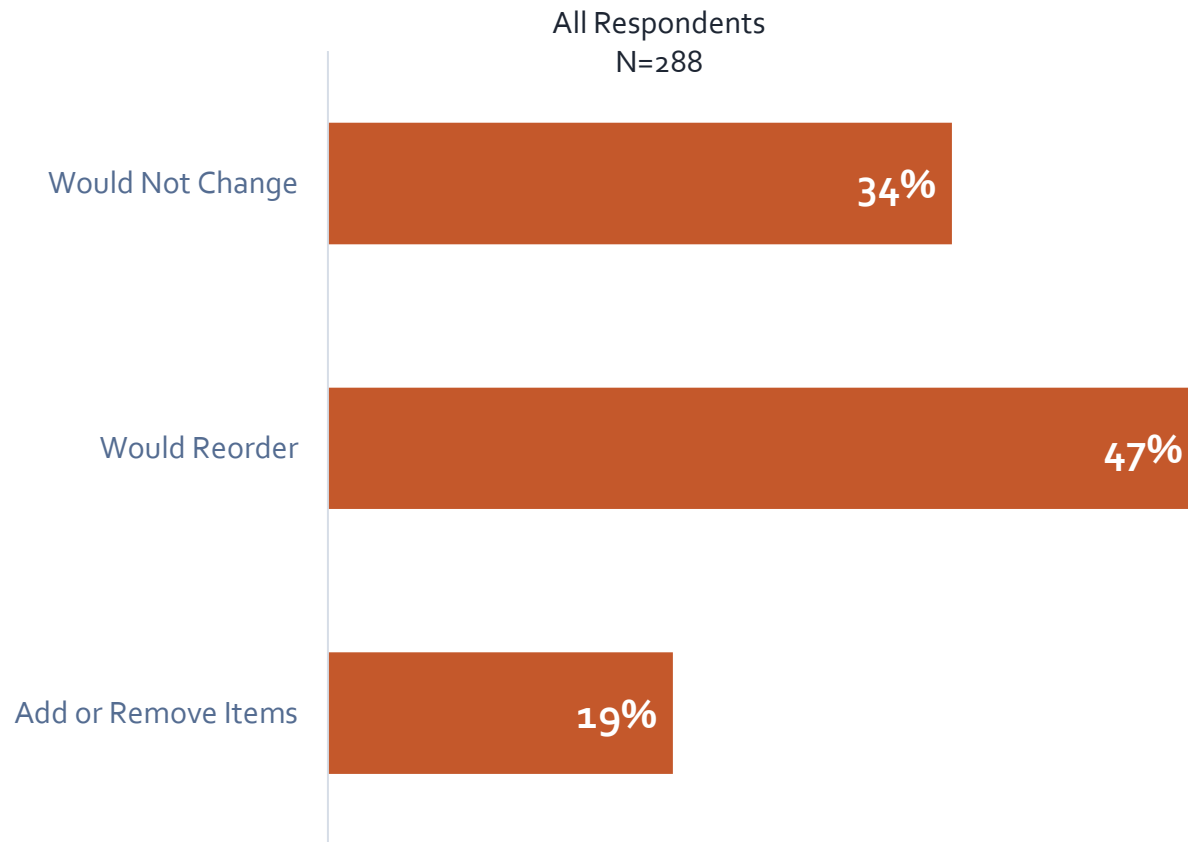
COVID Flash Survey respondents were presented with the original 2020 HCEG Top 10 list, asked if it were still accurate and/or if they would re-order or add to it

## 2020 HCEG Top 10 Challenges, Issues and Opportunities

1. **Costs & Transparency** – Implementing strategies and tactics to address growth of medical and pharmaceutical costs and impacts to access and quality of care.
2. **Consumer Experience** – Understanding, addressing and assuring that all consumer interactions and outcomes are easy, convenient, timely, streamlined, and cohesive so that health fits naturally into the “life flow” of every individual’s, family’s and community’s daily activities.
3. **Delivery System Transformation** – Operationalizing and scaling coordination and delivery system transformation of medical and non-medical services via partnerships and collaborations between healthcare and community-based organizations to overcome barriers including social determinants of health to effect better outcomes.
4. **Data & Analytics** – Leveraging advanced analytics and new sources of disparate, non-standard, unstructured, highly variable data (history, labs, Rx, sensors, mHealth, IoT, Socioeconomic, geographic, genomic, demographic, lifestyle behaviors) to improve health outcomes, reduce administrative burdens and support transition from volume to value and facilitate individual/provider/payer effectiveness.
5. **Interoperability / Consumer Data Access** – Integrating and improving the exchange of member, payer, patient, provider data and workflows to bring value of aggregated data and systems (EHR’s, HIE’s, financial, admin and clinical data, etc) on a near real-time and cost-effective basis to all stakeholders equitably.
6. **Holistic Individual Health** – Identifying, addressing and improving the member/patient’s overall medical, lifestyle/behavioral, socioeconomic, cultural, financial, educational, geographic and environmental well-being for a frictionless and connected healthcare experience.
7. **Next Generation Payment Models** – Developing and integrating technical and operational infrastructure and programs for a more collaborative and equitable approach to manage costs, sharing risk and enhanced quality outcomes in the transition from volume to value. (bundled payment, episodes of care, shared savings, risk-sharing, etc).
8. **Accessible Points of Care** – Telehealth, mHealth, wearables, digital devices, retail clinics, home-based care, micro-hospitals; and acceptance of these and other initiatives moving care closer to home and office.
9. **Healthcare Policy** – Dealing with repeal/replace/modification of current healthcare policy, regulations, political uncertainty/antagonism and lack of a disciplined regulatory process. Medicare-for-All, single payer, Medicare/Medicaid buy-in, block grants, surprise billing, provider directories, association health plans, and short-term policies, FHIR standards, and other mandates.
10. **Privacy / Security** – Staying ahead of cybersecurity threats on the privacy of consumer and other healthcare information to enhance consumer trust in sharing data. Staying current with changing landscape of federal and state privacy laws.

# COVID Flash Survey Revisions to the 2020 HCEG Top 10 2

As a result of COVID-19, 2/3 of respondents would alter the HCEG Top 10



# Reprioritized 2020 HCEG Top 10

**Consumer Experience, Accessible Points of Care and Healthcare Policy are considered more important as a result of COVID-19**

## Original 2020 HCEG Top 10

1. (1) Cost and Transparency
2. (2) Consumer Experience
3. (3) Delivery System Transformation
4. (4) Data and Analytics
5. (5) Interoperability/Consumer Data Access
6. (6) Holistic Individual Health
7. (7) Next Generation Payment Models
8. (8) Accessible Points of Care
9. (9) Healthcare Policy
10. (10) Privacy/Security

## Revised 2020 HCEG Top 10

N=106

1. (2) Consumer Experience
2. (1) Cost and Transparency
3. (3) Delivery System Transformation
4. (8) Accessible Points of Care
5. (4) Data and Analytics
6. (5) Interoperability/Consumer Data Access
7. (6) Holistic Individual Health
8. (9) Healthcare Policy
9. (7) Next Generation Payment Models
10. (10) Privacy/Security

***Q. Below are the 2020 HCEG Top 10 in their current order. Please re-order them to reflect your ranking.***

## 4



***Q. Based on the industry upheaval caused by COVID-19, what would you add to the 2020 HCEG Top 10? Please add up to three items.***

# Additions to the 2020 HCEG Top 10

- COVID Response/Pandemic Preparedness dominate the topics added to the Top 10
- Supply Chain Optimization is also new to the Top 10 (PPE, access, medication, etc.)
- #3 – Delivery System Transformation now includes Improving Healthcare Quality, Value-Based Reimbursement, Prevention and Integration of Digital Health
- Remote Access/Telemedicine was emphasized for #4 – Accessible Points of Care
- “Data Integration” should be added to #5 – Data and Analytics
- Disparities/Inequities in Healthcare need to be added to both #7 -Holistic Individual Health and, more importantly, #8 – Healthcare Policy

Topic	Mentions
COVID-19/Pandemic Response	60.5%
Remote Access/Telemedicine	27.9%
Supply Chain Optimization/Configuration <sup>N=43</sup>	20.9%
Addressing Disparities in Healthcare	16.3%
Data “Integration” & Analytics	9.3%
Improving Healthcare Quality	7.0%

## COVID added Pandemic Preparedness & Supply Chain Optimization to the HCEG Top 10

### Original 2020 HCEG Top 10

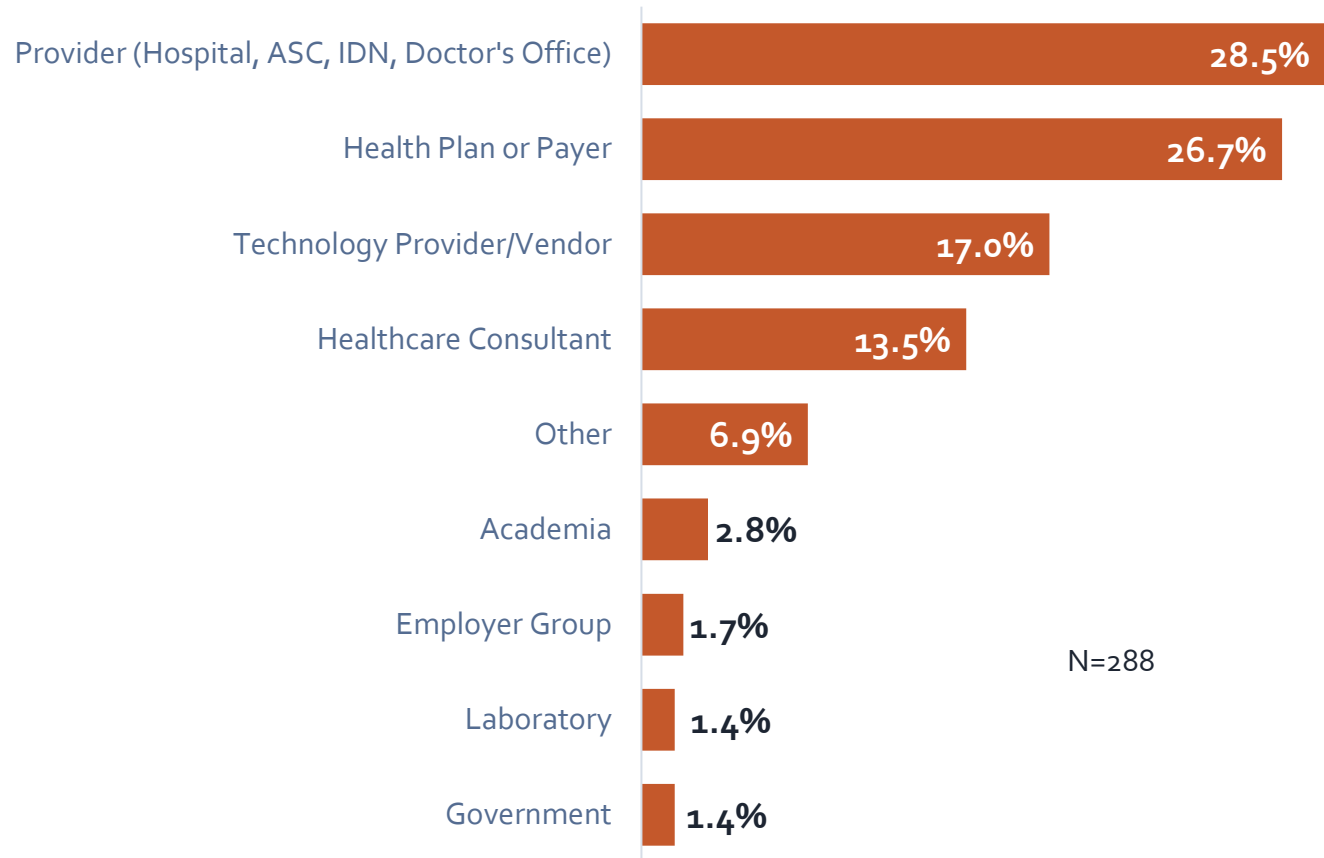
1. (1) Cost and Transparency
2. (2) Consumer Experience
3. (3) Delivery System Transformation
4. (4) Data and Analytics
5. (5) Interoperability/Consumer Data Access
6. (6) Holistic Individual Health
7. (7) Next Generation Payment Models
8. (8) Accessible Points of Care
9. (9) Healthcare Policy
10. (10) Privacy/Security

### 2020-2021 Interim HCEG Top 10

1. (2) Consumer Experience
  2. (1) Cost and Transparency
  3. (3) Delivery System Transformation
  4. (8) Accessible Points of Care
  5. (4) Data and Analytics
  6. (5) Interoperability/Consumer Data Access
  7. (6) Holistic Individual Health
  8. (9) Healthcare Policy
  9. (7) Next Generation Payment Models
  10. (10) Privacy/Security
- (New) COVID-19/Pandemic Preparedness
- (New) Supply Chain Optimization

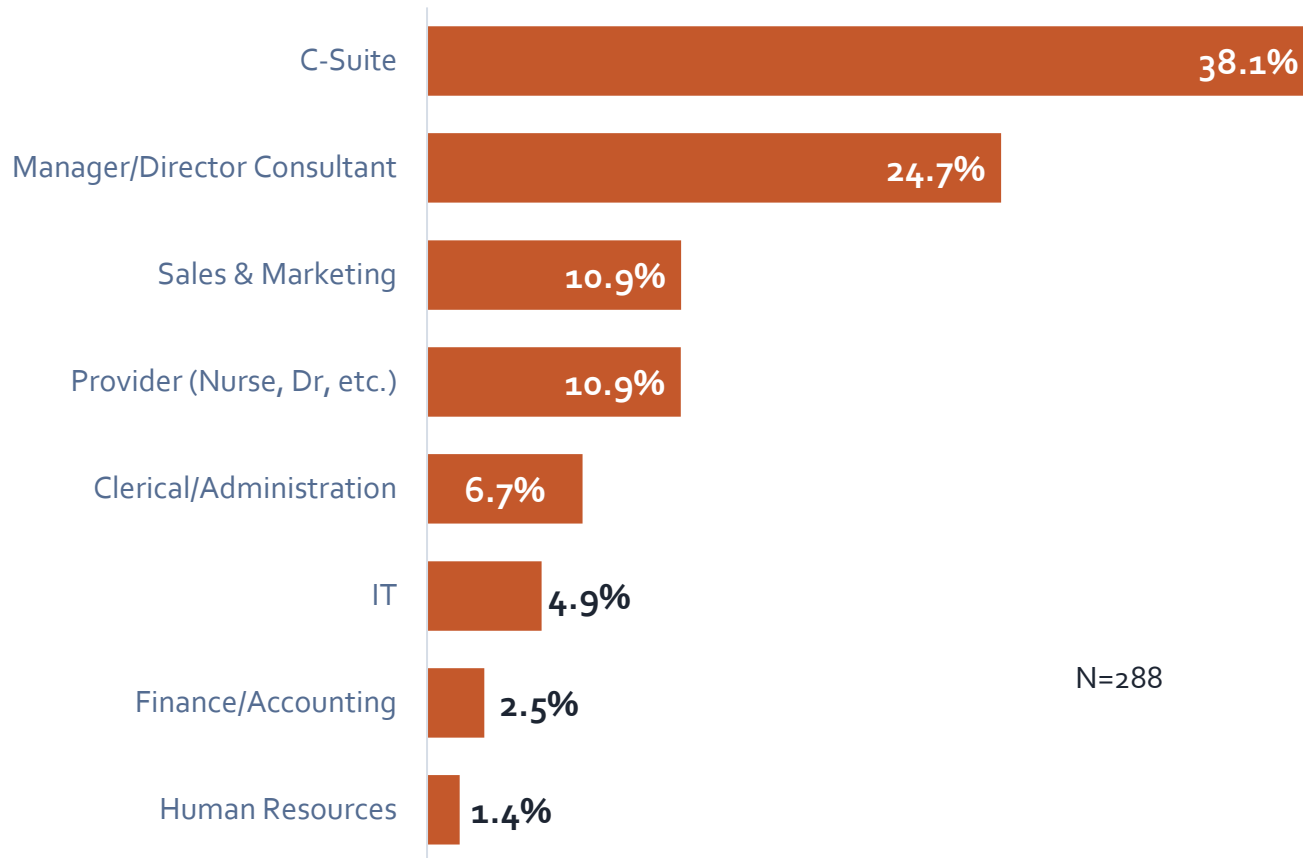
# Industry Profile of COVID Flash Survey Respondents 7

More than half of respondents were Provider or Payer organizations



# Executive Profile of COVID Flash Survey Respondents 8

Nearly 40% of respondents were C-Suite executives



N=288