



IDC's Digital Transformation Use Case Road Map: Value-Based Health, 2022

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Value-Based Health Digital Roadmap 2022



HORIZON 1 - Activate

HORIZON 2 - Optimize

HORIZON 3 - Strategize

Legend

- Priority 1** (Green hexagon): Provide core foundational information processing
- Priority 2** (Orange hexagon): Provide actionable insights
- Priority 3** (Purple hexagon): Make use of AI and machine learning to provide intelligence

IDC's Take

- Mandates in the U.S. to remove barriers to patient access to their healthcare data drove the addition of the “Identity, Access and Consent Management” use case and the delivery of digital or virtual care drove the addition of the “Hospital at Home” use case. Providers are refocusing on initiatives that got shelved throughout 2020 and 2021 due to the pandemic. These initiatives include optimizing clinical documentation, revenue cycle management, and digital patient engagement and experience with an emphasis on medical equity, diversity, inclusion, and cultural competency (MEDIC).
- Care anywhere is added as a new use case under the strategic priority of convenient access to care. Payers, providers, and even life science organizations, are looking outside the four walls of conventional care settings to offer care when and where the consumer wants to receive it. According to IDC's *US Healthcare Provider Technology and Connected Health Survey* (January, 2022), 17.1% of providers reported that care anywhere would be a top 3 technology and health IT initiatives that will impact healthcare over the next 5 years.
- In addition to refocusing on shelved initiatives and use cases deployed during the pandemic to advance digital patient engagement and experience (e.g., remote health monitoring, digital front door, and hospital at home), top of mind drivers and initiatives that healthcare organizations are now prioritizing include the rise of consumerism, staff shortages, rising costs, dwindling margins, infrastructure modernization, and hybrid work models.
- The drive towards health equity, particularly in terms of COVID-19 exposure drove healthcare organizations to demand “Machine Learning Driven Predictive Analytics. Rules-based predictive analytics is considered mainstream and so no longer considered a DX use case. 30.3% of providers in 2022 are focusing on MEDIC to prevent and break down any systemic barriers that can impact the provision of fair care to those who need it via adaptive services, partnerships, investments, as well as better commitments to stakeholders, consumers/patients and the community.
- With The Center for Medicare and Medicaid Services (CMS) redesign of the ACO REACH model (estimated go live January 1, 2023) value-based healthcare goals of health equity for underserved communities, ongoing provider leadership and governance and greater visibility related to ongoing model performance are prioritized. Lessons learned will then be funneled into future aspects of the more mainstream Medicare Shared Savings Program (MSSP). model.
- As of result of government led recovery initiatives, European healthcare is accelerating on the execution of integrated care strategies, based on greater collaboration between primary and secondary care and between healthcare and social care. These initiatives will drive in horizon 1 new investments key solutions as EMR, enterprise medical imaging and population health management and their integration in use cases related to clinical collaboration, home hospitalization, virtual care and digital front door. The development of the European Health Data Space regulation is expected to accelerate investments in use cases related to data platform in horizon 2, while in horizon 3 healthcare providers will be focused into scaling AI /ML solutions to automate processes, support clinical decisions and increase collaboration with life sciences research.
- Surge in telehealth and remote care for the past two years, well supported by the respective country governments through policies and initiatives, care providers in Asia Pacific prioritize on EMR adoption. While use cases associated with ‘data-rich’ increasingly fall into horizon-1, wider adoption of use cases related to ‘data-driven’ will have a shift towards horizon-2 and 3.

Related Research

- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2022: Value-Based Health* (IDC #US48584822, July 2022)
- *IDC Market Glance: Connected Health, 2Q22* (IDC #US47817122, June 2022)
- *IDC Perspective: Prior Authorizations Deep Dive — Feasibility Now Foreseen to Solve This Health Ecosystem Menace* (IDC #US49001122, Apr 2022)
- *IDC Market Glance: Remote Health Monitoring, 1Q22* (IDC#US47234621, March 2022)
- *Future of Intelligence for Healthcare: The Time Is Now* (IDC #US48859722, Mar 2022)
- *Impact of Being Data Driven on Healthcare Organizations* (IDC #US48909222, Mar 2022)
- *IDC Market Glance: Healthcare Analytics, 1Q22* (IDC #US48842822, Feb 2022)
- *IDC Market Glance: Payer, 1Q22* (IDC# US48902222, Mar 2022)
- *Data Management in Healthcare* (IDC # US48441521, Dec 2021)
- *Connected Health IT Investment Trends* (IDC #US47234521, December 2021)
- *IDC Market Glance: Healthcare Ecosystem, 4Q21* (IDC #US48455721, December 2021)
- *IDC Market Glance: Post-Acute Healthcare, 4Q21* (IDC #US48449521, December 2021)
- *Healthcare Industry Journey Toward the Intelligent Enterprise* (IDC # US48354021, Nov 2021)
- *IDC FutureScape: Worldwide Healthcare Industry 2022 Predictions* (IDC #US47231021, October 2021)

Related Research (continued)

- *IDC PlanScape: The Digital Front Door for Providers* (IDC #US48034021, August 2021)
- *IDC TechScape: U.S. Connected Health Technologies, 2021* (IDC #US44610820, July 2021)
- *IDC Market Glance: Healthcare Provider Operational IT Solutions, 2Q21* (IDC #US46584121, May 2021)
- *Toward Health Equity — Social Determinants of Health Analytic Approaches* (IDC #US47608121, April 2021)
- *IDC Market Glance: Healthcare Provider Clinical IT Solutions, 2Q21* (IDC #US46583821, April 2021)
- *Federal Support for Communities to Integrate Clinical and Social Care: Recently Introduced Legislation* (IDC #lcUS47527821, March 2021)
- *The Digital Front Door: Opening Up the Patient-Centric Healthcare Industry Ecosystem* (IDC #DR2021_FoIE_MS, March 2021)



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