

2017 Health Care Industry Risk Survey Highlights

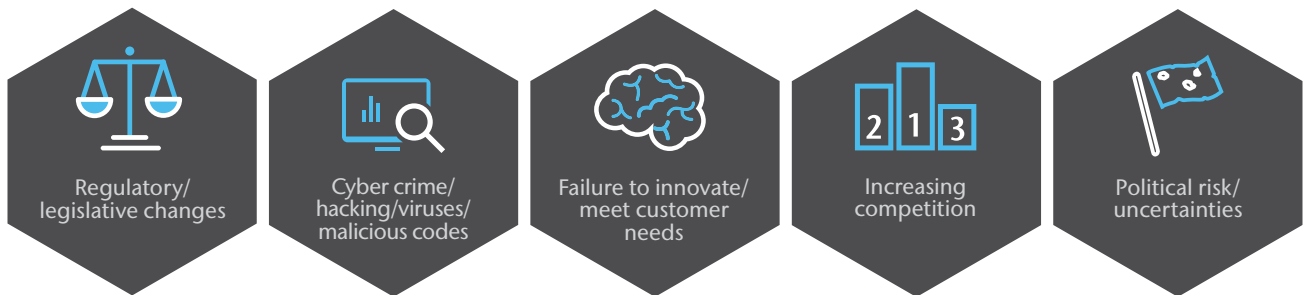
Today's Health Care organisations are facing complex and interconnected risks.

We live in an era of unprecedented volatility. Trends on three major dimensions – economics, demographics, and geopolitics – combined with the exponential pace of technology change, are converging to create a challenging new reality for organisations. These forces create opportunities that we cannot even imagine, but also present new frontiers to be explored.

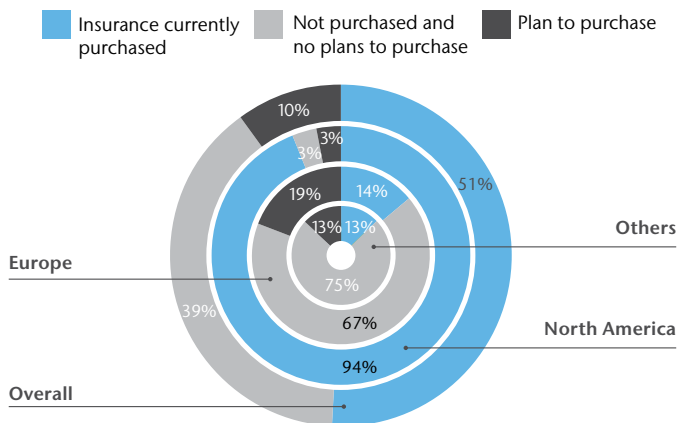
Top Ten Risks



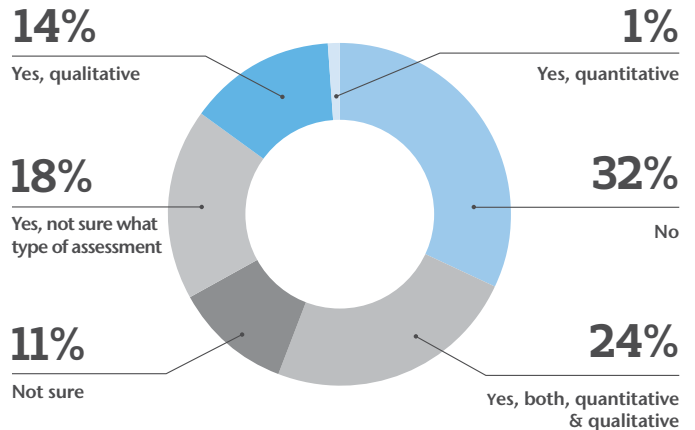
Top Five Emerging Risks in 2020



Cyber Purchasing Patterns















Cyber Risk – Completed Assessment

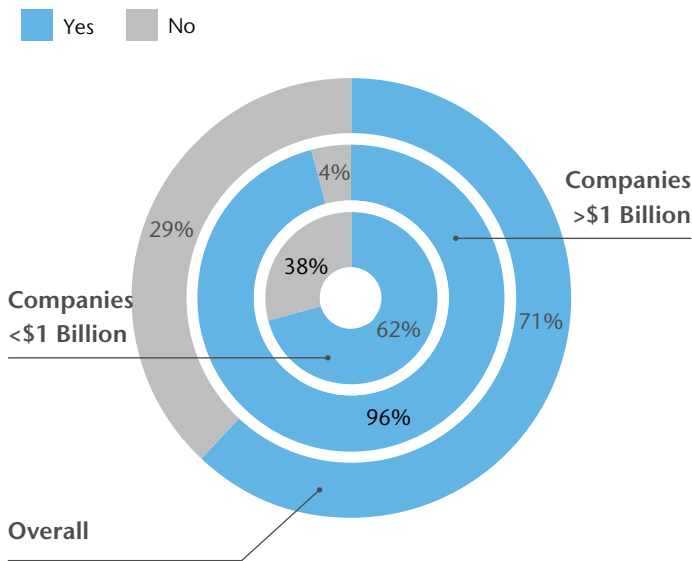


To keep pace with the pervasive and fast evolving cyber threats that go hand in hand with the dizzying speed of technological innovation, much more progress is needed in the area of cyber risk control and mitigation.

Risk Departments Cultivate a Comprehensive Process to Identify and Assess Current and Emerging Risks

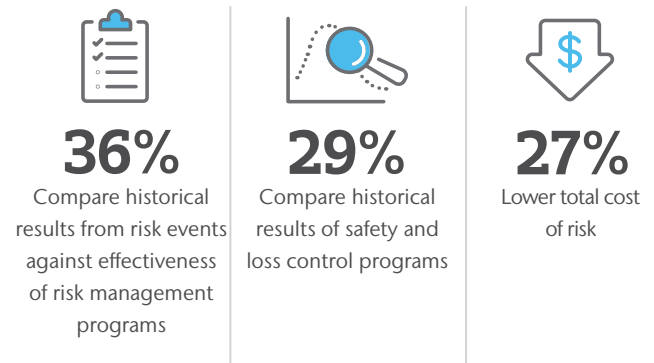
Identification of Major Risks	Assessment of Major Risks
 56% Senior management judgment and experience	 50% Senior management judgment and experience
 49% Board and/or management discussion of risk during annual planning, risk assessment or other processes	 39% Board and/or management discussion of risk during annual planning, risk assessment or other processes
 44% Risk information from other function-led processes (e.g. internal audit, disclosure, compliance, etc.)	 36% Structured enterprise-wide risk assessment process supported by a standard toolkit and methodology
 43% Structured enterprise-wide risk identification process	 22% Consult with external service provider/advisor
 31% Industry analysis, external reports	 20% No formalised process
 17% No formalised process	 16% Risk modeling/risk quantification analysis

Presence of a Formal Risk Management Department

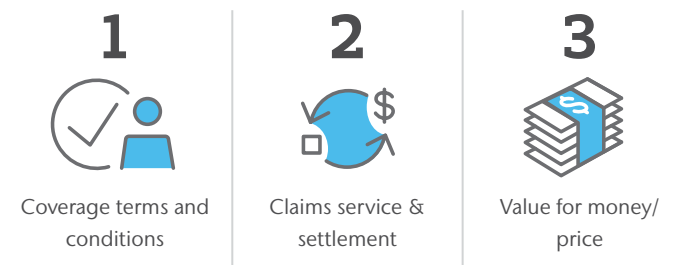


Data Source: Aon's 2017 Global Risk Management Survey

What top 3 methods do you utilise to evaluate the effectiveness of your risk management program?



What are the 3 most important drivers in your choice of insurers?



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