Patient Engagement is Changing: Trends and Successes

Session #245, February 14, 2019

Kelli L. Bravo, VP Healthcare and Life Sciences, Pegasystems
Agenda

- Market Overview
- Pega Survey results
- Summary
Learning objectives

- Hear what your peers have to say about the visions, struggles and attempts to engage Patients
- Learn what those Patients have to say about our industry’s engagement efforts
- Discover what we can do together to change the patient experience
Everyone is competing for today’s healthcare consumer
There is massive digital demand for health and wellness experiences

- 72% of people researched health online
- 77% of health inquiries start with search
- 58% refilled their prescriptions online
- 32% measure fitness goals via app
- 31% pay their medical bills online
- 24% monitor their health issues with devices
- 18% research care costs with insurer tools
- 17% get alerts for treatment or medication

Sources: Pew & Deloitte University Press
Modern Patients
...have different expectations

- Empowered by tech
- Connected digitally, across channels
- Relentlessly tracking disease states
- Rapidly shifting health goals
- Completely intolerant of interruption
- Constantly looking for more – but – on their own terms
But Healthcare struggles to support them

1. Large, highly-complex businesses
2. Countless conflicting goals & stakeholders
3. Operating with disconnected data and channels
4. Managing 100’s of concurrent programs

This environment produces a painful, disjointed experience.
We need to do better

<10% of organizations (health systems, payers, pharma, PBMs) can adapt experiences quickly enough to optimize each Patient’s unique path-to-health
Today, Patient engagement focuses on pushing information, with outreach campaigns.
But what do Patients want?
And how as an industry do we think we are meeting their expectations?
It’s time for a new Patient journey

“We asked more than 2,000 Patients and 200 senior healthcare executives from health plans, health systems, and pharma companies across the nation what they think about engagement, service, and personalization in healthcare.”

“What we discovered is that there are fundamental differences between how Patients see engagement and how the industry who delivers it sees it.”

Survey conducted by independent third party research house: Censuswide
Image source: losangelesmedicine.org
The results are in...
Our recent Patient engagement benchmark survey (n=2018)
Health behavior trends 2018-2019

- % of consumers that track their eating habits and exercise on mobile applications: 33% (2019) vs. 30% (2018)
- % of consumers that believe financial incentives and rewards would encourage them to make healthy choices: 57% (2019) vs. 56% (2018)
- % of consumers that say their family and friends (social circle) help them make better choices about their health: 46% (2019) vs. 57% (2018)
- % of consumers having easy access to healthy food in their community: 80% (2019) vs. 75% (2018)
- % of consumers more likely to focus on their health and well-being when they feel financially stable: 65% (2019) vs. 70% (2018)
Engagement insights
Centralized communication is consistent across organizations

*My organization has a centralized way to prioritize wellness programs, outreach, benefits information, etc., that are sent to members/patients*
Inconsistent information permeates

My organization sends inconsistent information to our members/patients (wellness program information that is not personalized or that might provide conflicting guidance for multiple chronic conditions)

47+% agree

Do you receive inconsistent information from ... (wellness programs not personalized, conflicting guidance, etc.)?

- Doctor’s office: 26% agree, 39% disagree
- Local Hospital: 22% agree, 27% disagree
- Primary Health Insurer: 28% agree, 20% disagree
- Pharmacy Benefit Manager/Prescription Mail Order pharmacy: 21% agree, 22% disagree
- Pharmaceutical/Drug company: 25% agree, 21% disagree

consumer s
I would switch doctors due to poor communication or engagement

78\% agree
Information sync could be improved

My doctor and my health insurance company are in sync and closely connected

31% agree

I find my health insurance bills easy to understand

32% agree

My health insurer is able to tell me how much I’ll owe before I get a procedure and/or appointment

39% agree
Nurse advice drives engagement

Our members/patients use the free nurse-based care services we provide to help them with their medical condition

69% agree
Wellness is tailored to our patients/members.

My organization designs wellness programs (step counting, gym memberships, etc.) based on the needs of our consumers.

37% agree that wellness programs (step counting, gym memberships, etc.) from their health insurance company are useful and tailored to their needs.
## Engagement drives health outcomes

To what extent do you agree or disagree that the communications by these organizations make you want to do more to improve your health?

<table>
<thead>
<tr>
<th>Organization</th>
<th>Overall Agree</th>
<th>Overall Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctor's office</td>
<td>65%</td>
<td>6%</td>
</tr>
<tr>
<td>Local Hospital</td>
<td>40%</td>
<td>9%</td>
</tr>
<tr>
<td>Primary Health Insurer</td>
<td>45%</td>
<td>11%</td>
</tr>
<tr>
<td>Pharmacy Benefit Manager/Prescription Mail Order pharmacy</td>
<td>27%</td>
<td>12%</td>
</tr>
<tr>
<td>Pharmaceutical/Drug company</td>
<td>24%</td>
<td>15%</td>
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Engagement can improve

How engaged/unengaged do you think your members/patients are with you?

To what extent do you agree or disagree that the way these organizations communicate motivates you to engage more with the organization?
Engagement crosses channels

We offer enough channels (email, phone, chat, etc.) for our members/patients to communicate with us?

Our organization makes it convenient for members/patients to engage with us?
Channel alignment is consistent

What channels do you use MOST to connect with the following?

Aside from in person appointments/procedures, how do you MOST like to interact with the following health organizations?

consumer

#HIMSS19
Continued engagement is desired

“We believe we are succeeding in our engagement programs with our members/patients.”

Do you want more or less communication from the following health organizations?

- Consumer
- Healthcare Payer
- Healthcare Provider/Health System
- Pharmaceutical Company

### Representations of consumer satisfaction and communication preferences:

**Strongly agree:**
- Doctor's office: 60% (Consumer: 27%)
- Hospital: 65% (Consumer: 12%)
- Primary health insurer: 67% (Consumer: 19%)
- Pharmacy: 62% (Consumer: 12%)
- Pharmaceutical company: 59% (Consumer: 10%)

**Agree:**
- Doctor's office: 60% (Consumer: 12%)
- Hospital: 65% (Consumer: 17%)
- Primary health insurer: 67% (Consumer: 21%)
- Pharmacy: 62% (Consumer: 22%)
- Pharmaceutical company: 59% (Consumer: 10%)

**Neither agree nor disagree:**
- Doctor's office: 3% (Consumer: 5%)
- Hospital: 4% (Consumer: 6%)
- Primary health insurer: 3% (Consumer: 8%)
- Pharmacy: 0% (Consumer: 0%)
- Pharmaceutical company: 0% (Consumer: 0%)

**Disagree:**
- Doctor's office: 1% (Consumer: 2%)
- Hospital: 1% (Consumer: 1%)
- Primary health insurer: 1% (Consumer: 0%)
- Pharmacy: 0% (Consumer: 0%)
- Pharmaceutical company: 0% (Consumer: 0%)

#HIMSS19
New technologies will bridge the gap

Are you planning to explore new technologies to better engage your members/patients?

<table>
<thead>
<tr>
<th>Yes, we are investigating new technologies now</th>
<th>Yes, we plan to within the next year</th>
<th>No, we don’t plan to</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>86%</td>
<td>13%</td>
<td>1%</td>
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<tr>
<td>84%</td>
<td>15%</td>
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<tr>
<td>87%</td>
<td>11%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>91%</td>
<td>9%</td>
<td>0%</td>
<td>0%</td>
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</tbody>
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- All Respondents
- Healthcare Payer
- Healthcare Provider/Health System
- Pharmaceutical Company
We see the opportunity for engaging Patients and improving outcomes with proactive, personalized outreach, service, and care.
Across their preferred channel

Channels

Business Objectives

Consistent

Contextual

Relevant

Timely

Growth

Retention

Risk

Service

Customer Needs

Consistent

Contextual

Relevant

Timely
Providing real-time insights & actions
Proactive, personalized interactions

PREDICT
Your Patient Needs & Preferences

PERSONALIZE
Content To The Patient & Moment

ARBITRATE
Between All the Potential Options

DELIVER
During Their Moments of Need
Enabling delivery of expected experiences

85% of leaders in the G2000 will try to leverage DX

2/3 of CIOs in the G2000 Will Put DX at the Heart of Their Corporate Strategy

Thrivers 2/3 Survivors

Spending on DX Technologies Reaches New Heights

Worldwide spending on (DX) technologies will grow to nearly $2 trillion in 2019

Retail and Health Will Increase DX Spending Faster Than Other Industries by 2019

Retailers will spend $185B (22% 5-year CAGR)

Healthcare Providers will spend $130B (21% 5-year CAGR)

Source: IDC 2018
Driving Patient engagement transformation

From Silos to Conversations

- **Siloed** (30%)
- **Integrated** (60%)
- **Conversational** (10%)
And enabling multi-faceted Patient journeys
Personalized, cost-effective HEALTH journeys...possible? YES!
Questions

Please complete the online session evaluation. Thank you.

Speaker Contact Information:

Kelli Bravo, Pegasystems, Kelli.Bravo@pega.com