

The New Health Consumer and DIYHealth – The Patient Engagement Opportunity



Third Annual Patient Engagement Summit
HIMSS Northern and Southern California Chapters
4 June 2015, San Francisco



Jane Sarasohn-Kahn, MA (Econ.), MHSA
THINK-Health and Health Populi blog

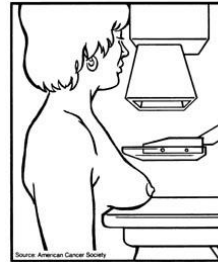




How Consumers Are Engaging with Health IT – the Patient Engagement Opportunity

- Economics 101 (macro, micro → personal)
- The Triple Aim and the patient as blockbuster
- DIY via consumer tech, morphing to HealthcareDIY
- Patient engagement opportunities & challenges
- THINK-aways...

JSK's Personal Health Ecology*

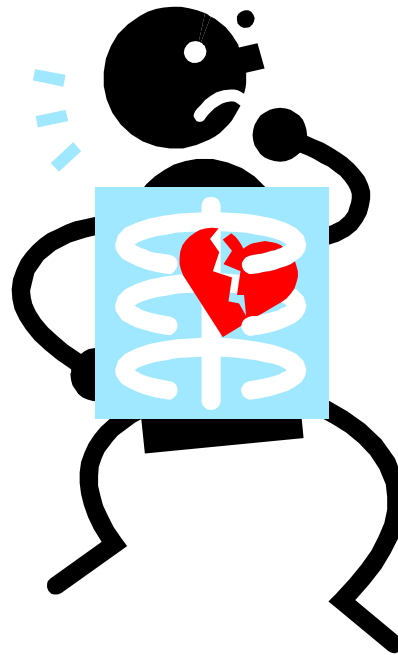


**Note: we all have one!*

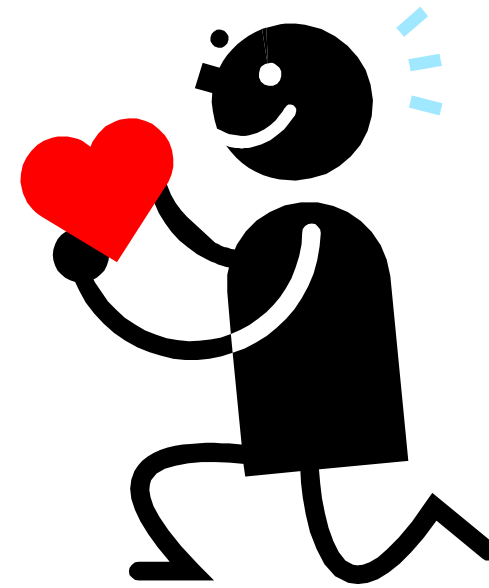
Defining Health Care “Consumers”



Consumers



Patients



Caregivers

Shima Andre Sues Anthem to Cover Cost of Hep C Rx Harvoni, May 2015 *"Not medically necessary"*



"I want to have a child, I want to enjoy motherhood, but I can't until Blue Cross approves my treatment so that I can be cured of Hep C," said plaintiff Shima Andre. "Blue Cross isn't just interfering with my health; their decision is preventing me from having a child."



Source: *Blue Cross Withholds Cure from Hepatitis C Patients, Lawsuit Claims, PR Newswire, May 15, 2015.*
Shima Andre v. Blue Cross, Los Angeles Superior Court, Case No. BC582063.


Hugo Campos, San Francisco Health Citizen
*“I can’t access the data generated by my implanted
defibrillator. That’s absurd.”*



Source: *The Heart of the Matter*, Slate, March 26, 2015

Rachael Farrokh Crowdfunds for Care

Rachael's Road to Recovery



SAN CLEMENTE, CA

\$195,191 of \$100k

Raised by 7,729 people in 1 month

Donate Now

SHARE ON FACEBOOK

gofundme

10K TOTAL SHARES

f SHARE 9.6K

t TWEET 885

Created April 29, 2015

✉ Rachael Farrokh

UPDATE #5

1 DAY AGO

7,729 DONATIONS

RECENT ▼



Source: Rachael Farrokh's GoFundMe Site Exceeds \$180K, San Clemente Times, May 27, 2015

Life After October 2008



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Gallup's U.S. Economic Confidence Index -- Weekly Averages Since May 2014

Latest results for week ending May 24, 2015



Gallup Daily tracking

GALLUP®



Emergent Post-Recession Consumer Consciousness

- Then
 - Passive
 - Careless
 - Simple
- Now
 - Active
 - Deliberate
 - Complex

EYES
WIDE
OPEN

WALLET HALF SHUT | THE EMERGING POST-RECESSION
CONSUMER CONSCIOUSNESS

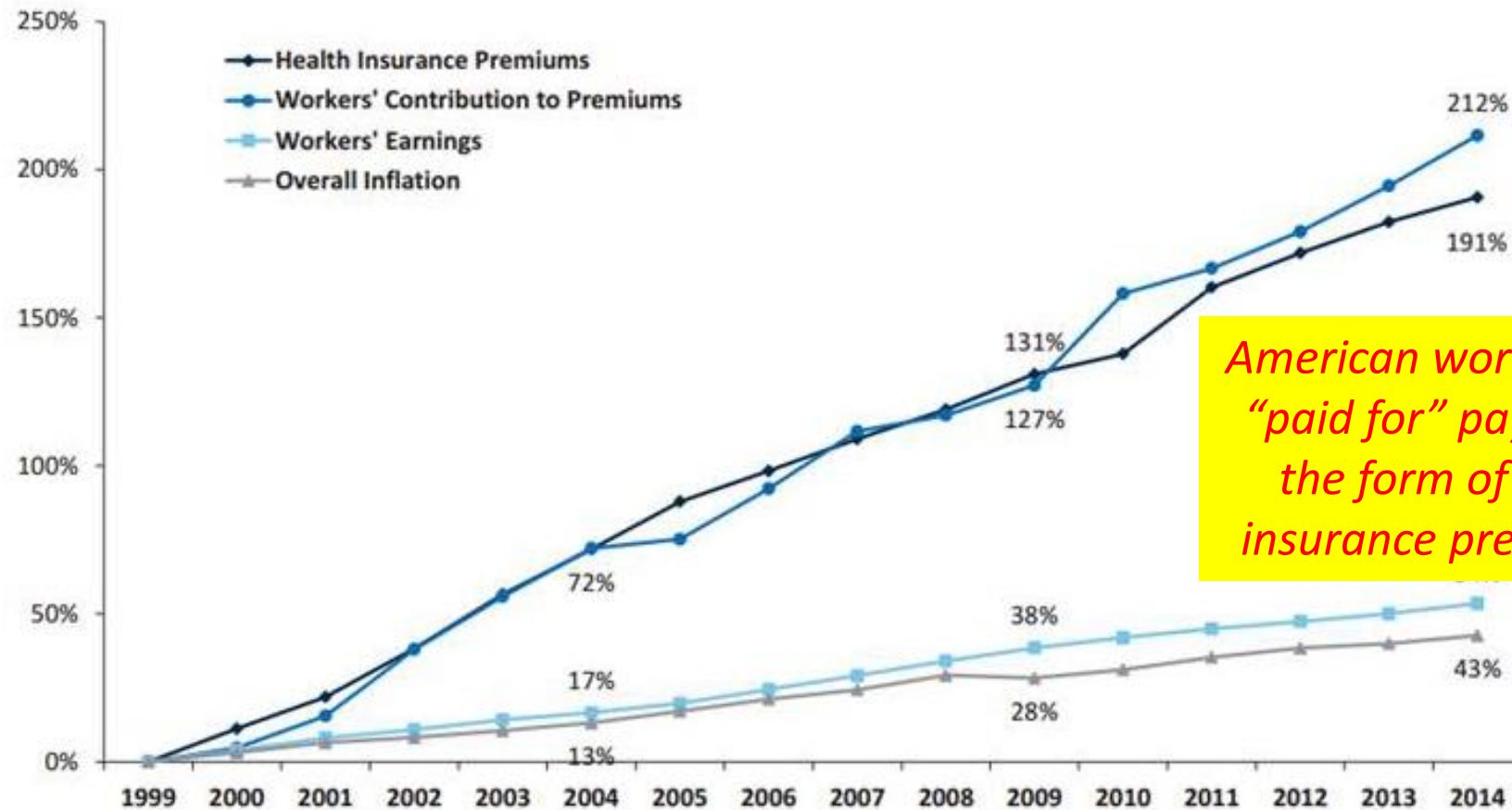
Sustainability is the
new happiness:

- Save me money
- Inspire creativity
- Conserve resources
- Keep me healthy



Source: Eyes Wide Open, Wallet Half Shut,
Ogilvy/Communispace, March 2010

Cumulative Increases in Health Insurance Premiums, Workers' Contributions to Premiums, Inflation, and Workers' Earnings, 1999-2014



American workers have “paid for” pay rises in the form of health insurance premiums...

SOURCE: Kaiser/HRET Survey of Employer-Sponsored Health Benefits, 1999-2014; Bureau of Labor Statistics, Consumer Price Index, U.S. City Average of Annual Inflation (April to April), 1999-2014; Bureau of Labor Statistics, Seasonally Adjusted Data from the Current Employment Statistics Survey, 1999-2014 (April to April).



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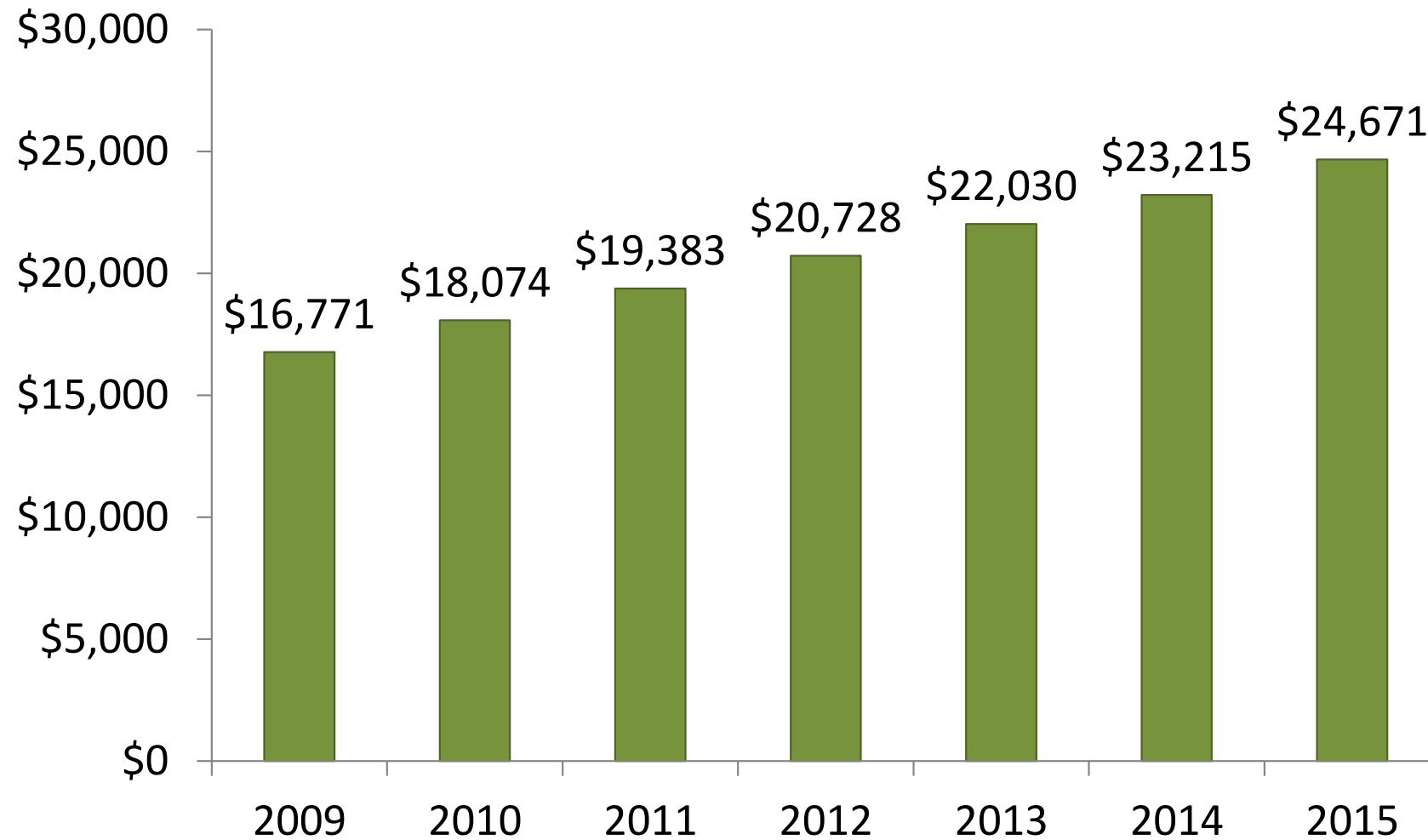
*“Come quickly—I think I had
an out-of-pocket experience.”*



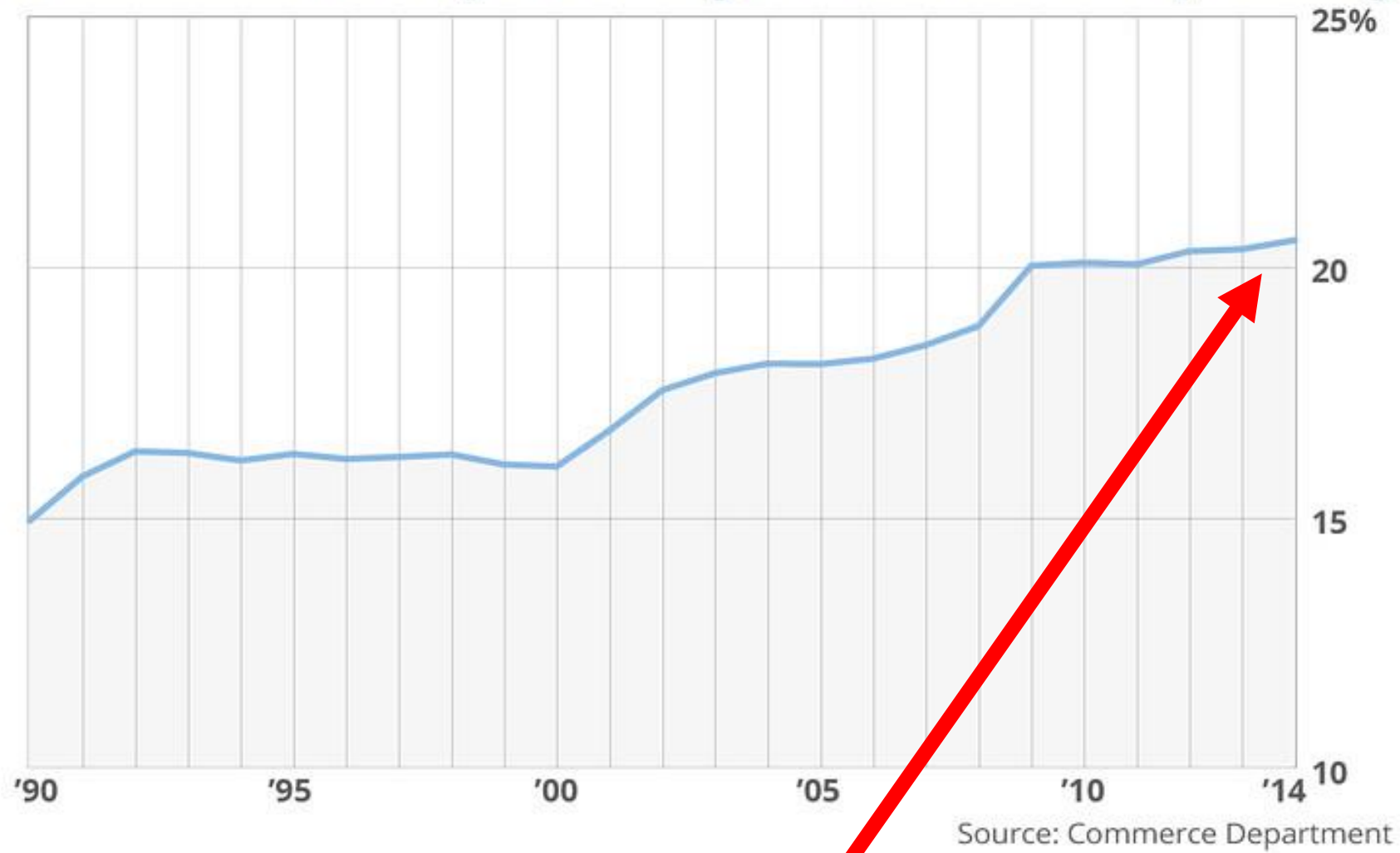


Health Costs for Family of Four = \$24,671

*Health Insurance, a 2015 Subaru Cross-Trek, or
a Year's Rent for 1 BR Apartment in Washington DC*



Healthcare as a percentage of consumer spending



\$1 in \$5 of consumer spending



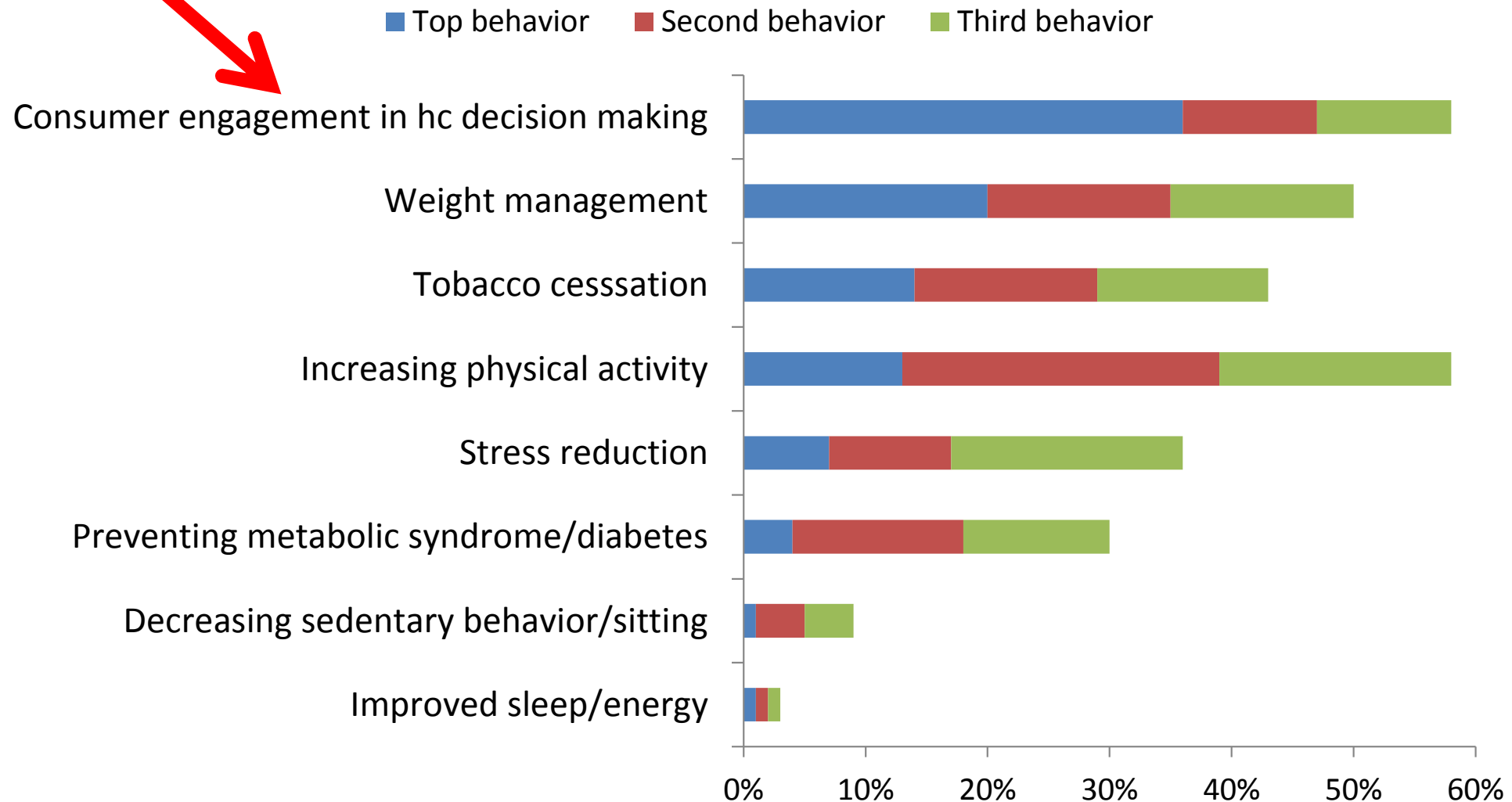
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Coupled with High-Deductible Health Plans...

Top 3 Behaviors Employers Are Focusing on In 2015

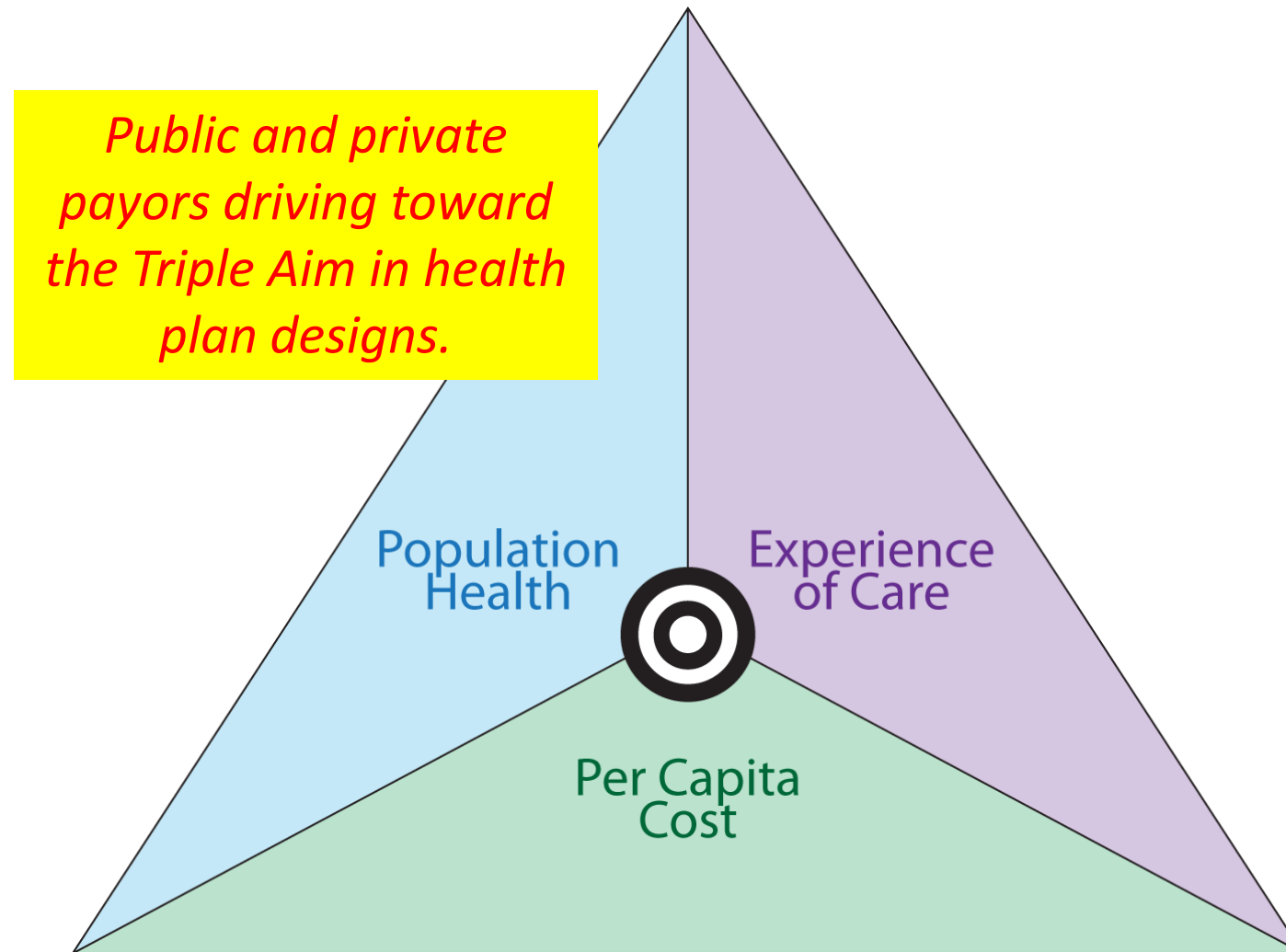
Consumer engagement, weight management, physical activity, tobacco and stress



Source: Large Employers' 2015 Health Plan Design Survey, National Business Group on Health, August 2014

Growing Embrace of the Triple Aim in Health Care

Operational Beacon for U.S. Health Care





*“We need to change the conversation from how much things cost to **how much health they produce.**”*

Dr. Mark Fendrick, Director

University of Michigan

Center for Value-Based Insurance Design

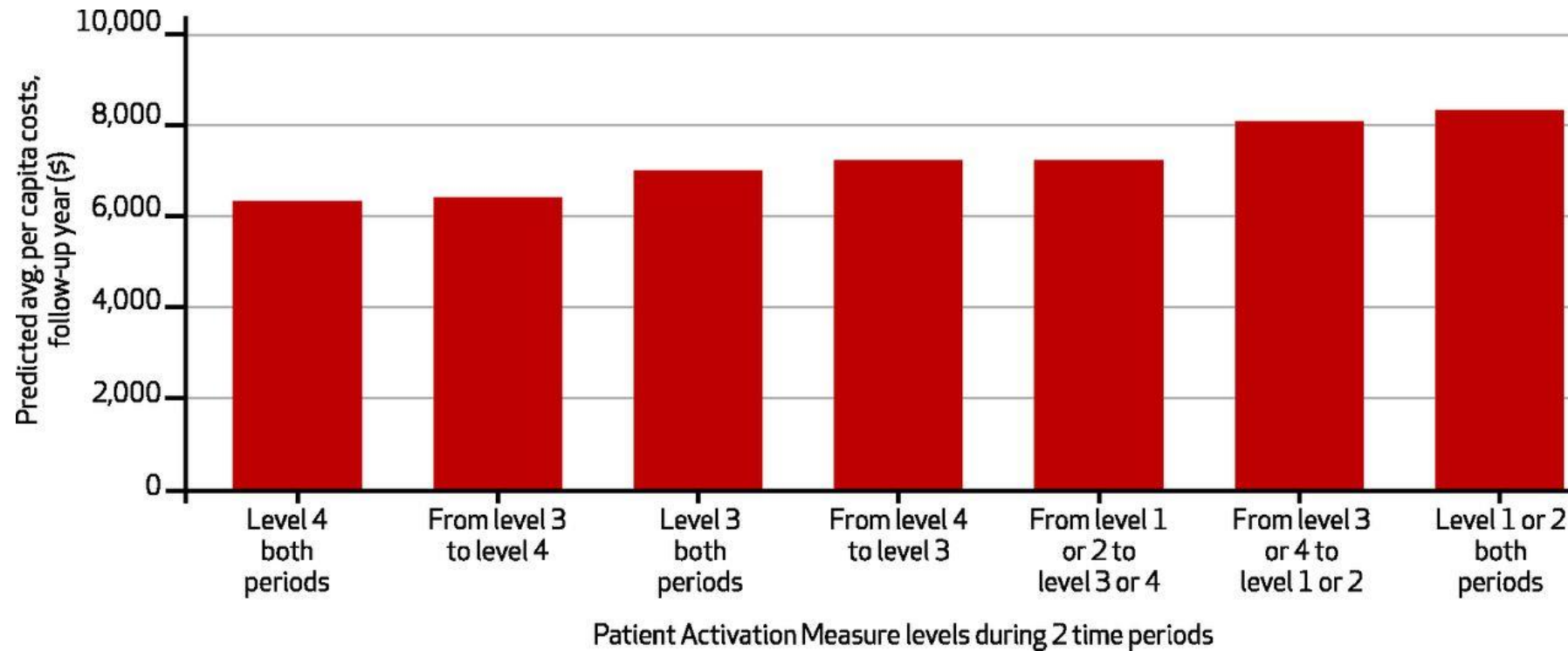




The More Activated a Patient Is, the Lower Their Health Costs *Health Affairs, March 2015*



Predicted Average Per Capita Costs In Follow-Up Year, By Change In Patient Activation Measure Levels During Two Time Periods.



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Source: When Patient Activation Levels Change, Health Outcomes And Costs Change, Too.
Greene et al. *Health Affairs* 2015;34:431-437 (March 2015)

DECEMBER 25, 2006 / JANUARY 1, 2007

www.time.com

TIME

PERSON OF THE YEAR



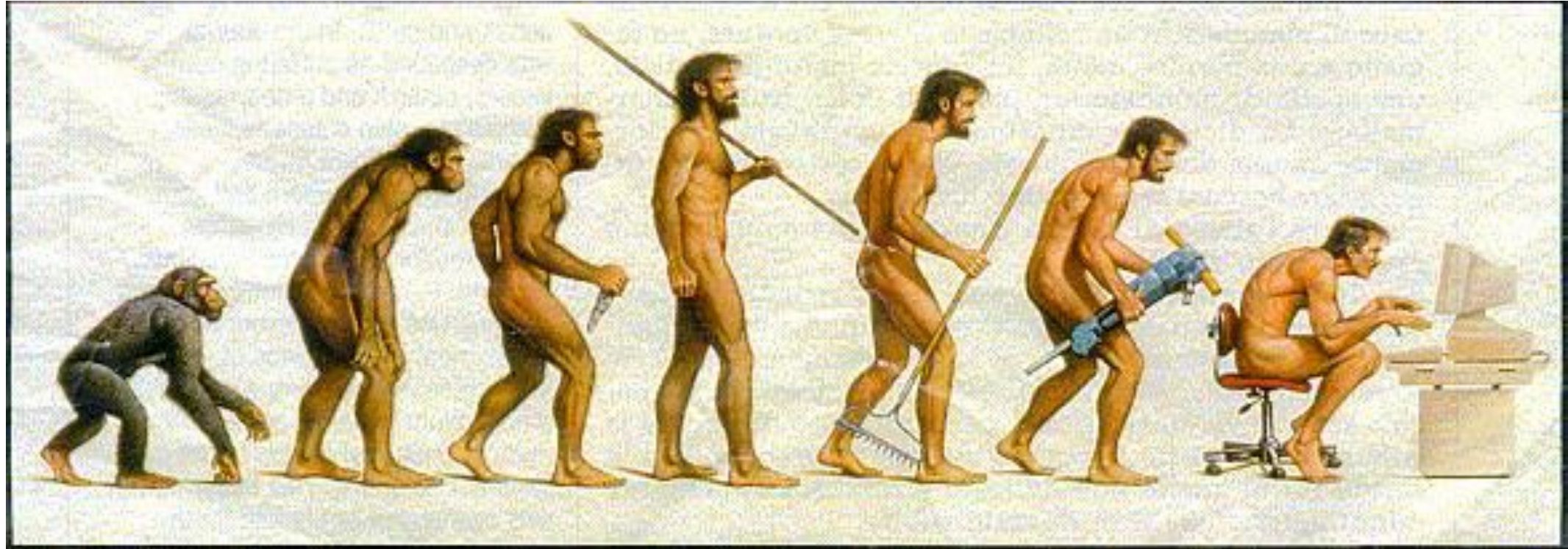
You.

Yes, you.
You control the Information Age.
Welcome to your world.



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Evolution of *Homo Informaticus*

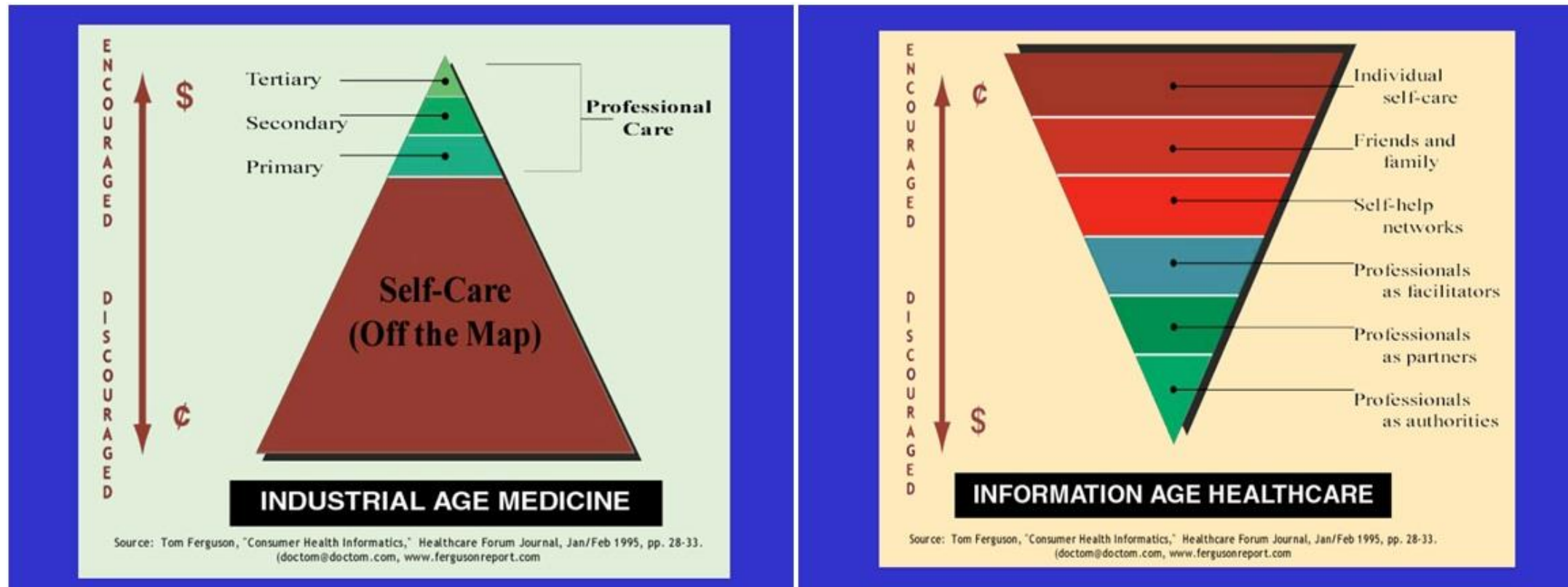


Source: Consumers on board: how to copilot the multichannel journey, EY, June 2014

DIY Life



From Industrial Age Medicine to Information Age Health/care

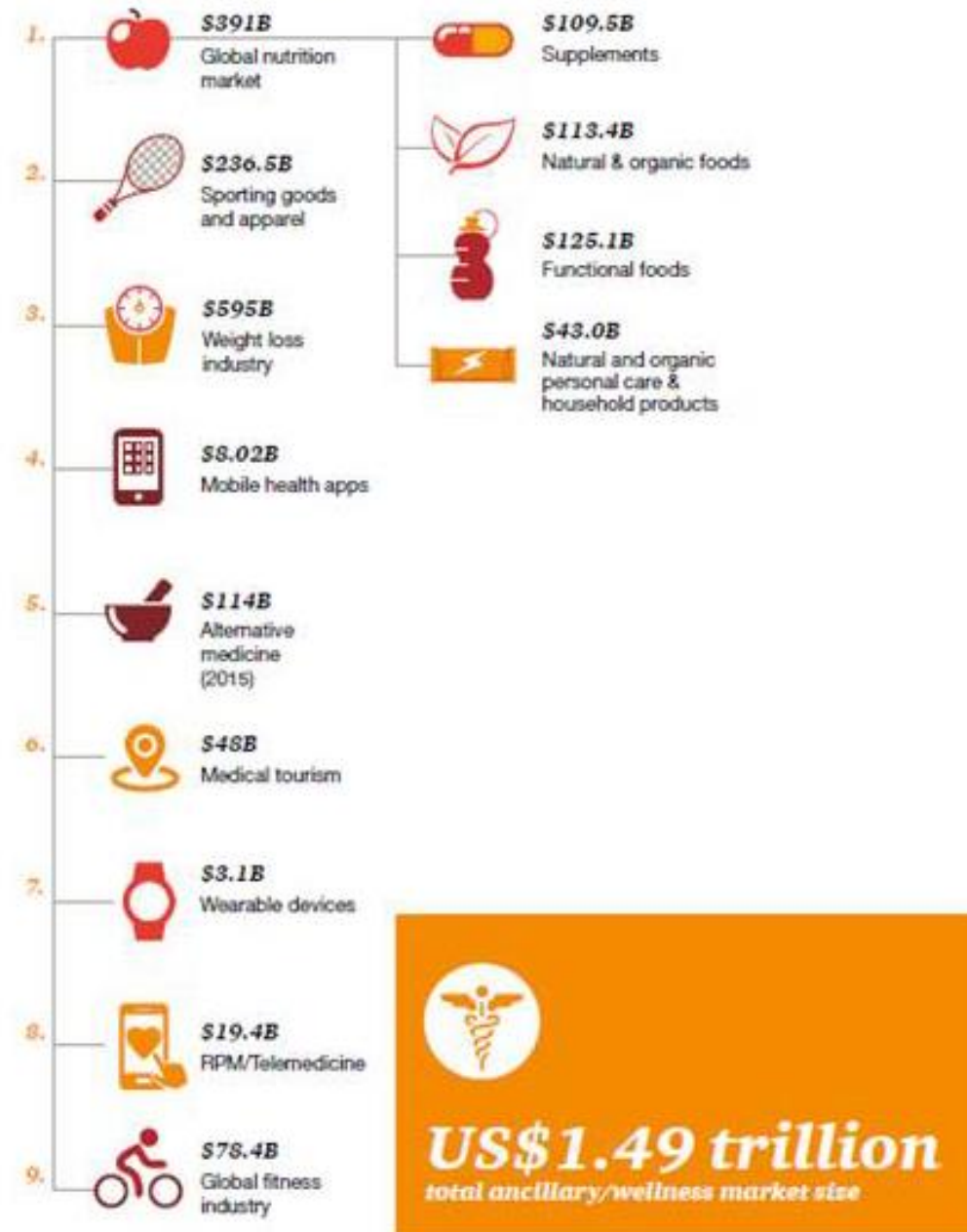


The New Retail Health

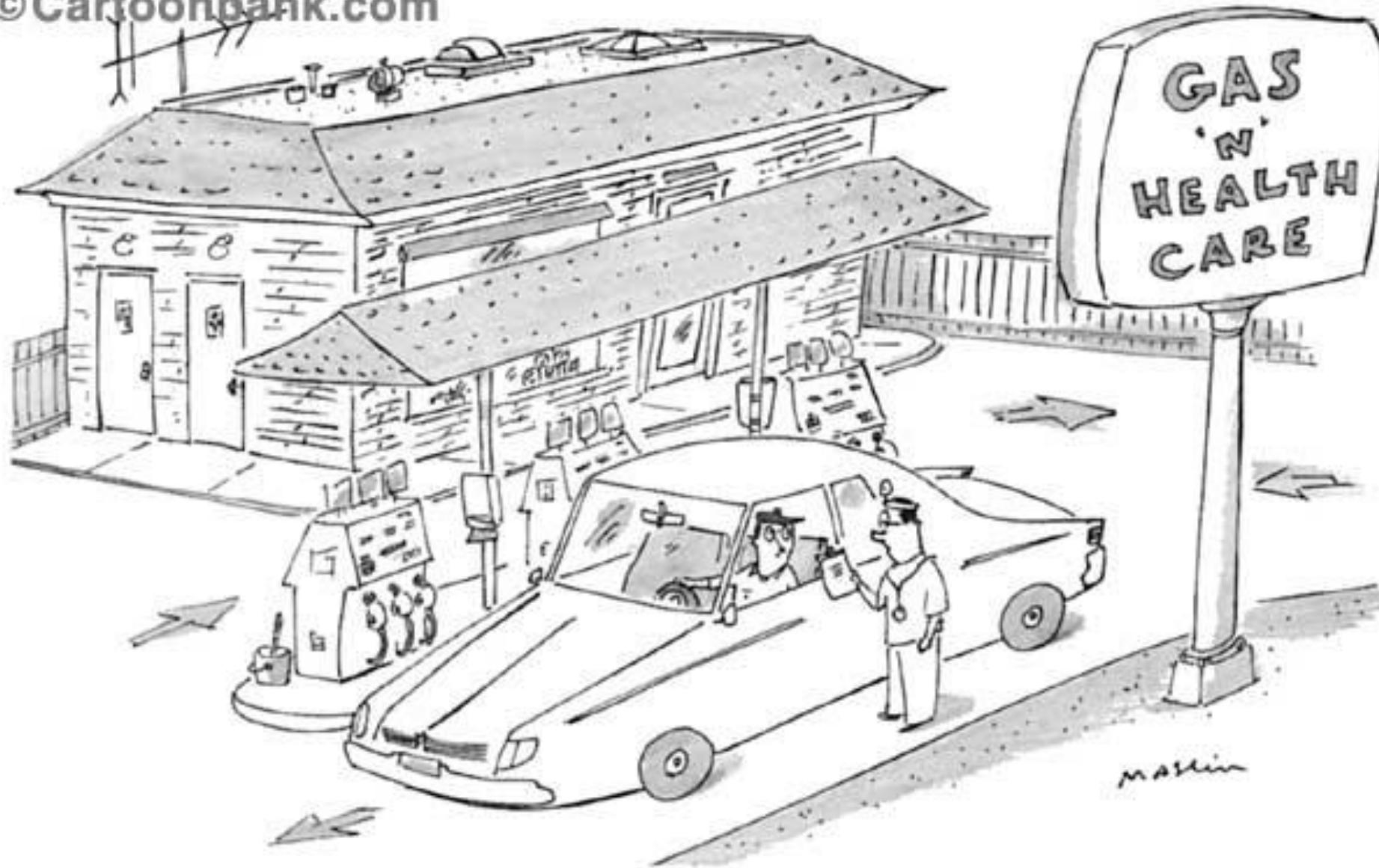


Figure 3: Global wellness and fitness market

New entrants have the potential to impact the US\$1.49 trillion marketplace.



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"Your oil's fine, but your blood-sugar level's a little low."



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Pharmacy's Growing Force in Health – Wellness and Public Health

Tobacco-Free 9-3-14



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A Growing Force in Health

The Clinic
at Walmart

Walmart
care clinic
quality healthcare at
an everyday low price



Save with our
Equate brand



Shop Equate ▶



\$4

**Prescription
Program***

\$4 for a 30-day supply or
\$10 for a 90-day supply

Choose from hundreds of generic drugs
and over-the-counter medications. [Learn More](#)
*Certain limitations may apply; click for more details.



Walmart
Vision Center

TOP RATED Solutions
to ensure better care



Wheelchairs ▶



Canes ▶



Rollators & Walkers ▶



Ramps ▶



Shopping Carts ▶

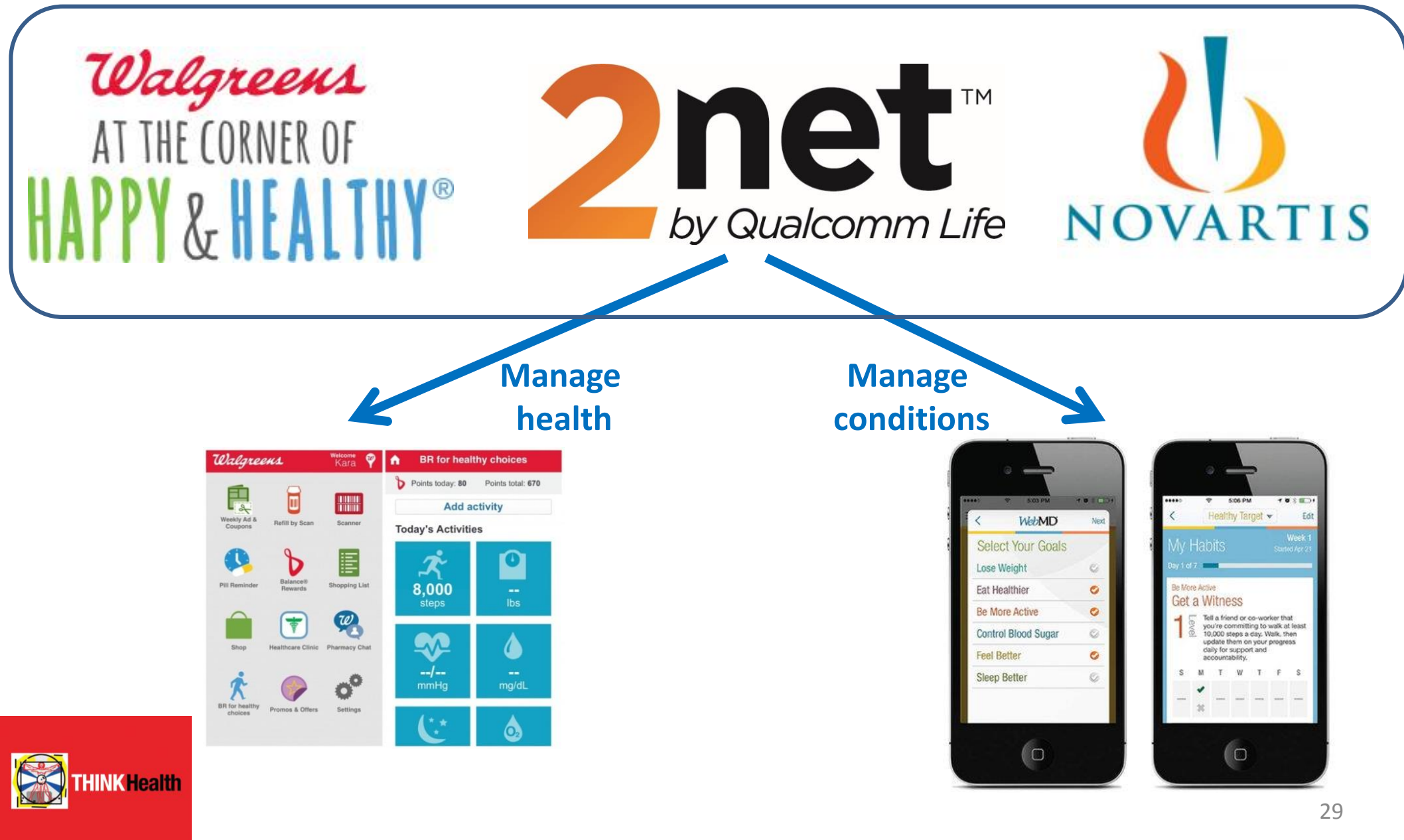
[Shop Top-Rated Products ▶](#)

Walmart
Save money. Live better.
HEALTH&BEAUTY



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Evolving Health Information Ecosystem: From Retail Health to Clinical Trials



Wegmans
pharmacy
Now offering

Free
Atorvastatin*
(Generic Lipitor®)

Free
Diabetes**
medications

Free
Antibiotics**

Switch now.
It's easy!

Just provide us your prescription info
and we'll do the rest.

Offers end April 30, 2015. Free medication offers only good at all Massachusetts locations.
See store for list of items. *Lipitor® is a registered trademark of Pfizer Ireland Pharmaceuticals.
** Select generics only, with prescription. Up to 14-day supply of antibiotics. Up to 90-day supply of
Atorvastatin & up to 30 day supply of diabetes medications.



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Key Categories in Consumer-Facing Health Devices

Growth of Internet of Things in Health/Care



Track
weight



Track
activity



Track
food



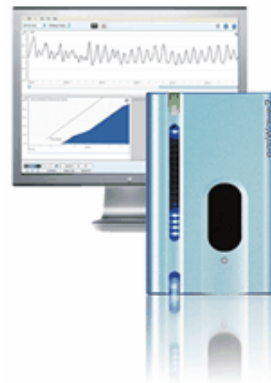
Track
sleep



PERS



Track
heart
function



Track stress
and mood



Track
meds



Track
"home"

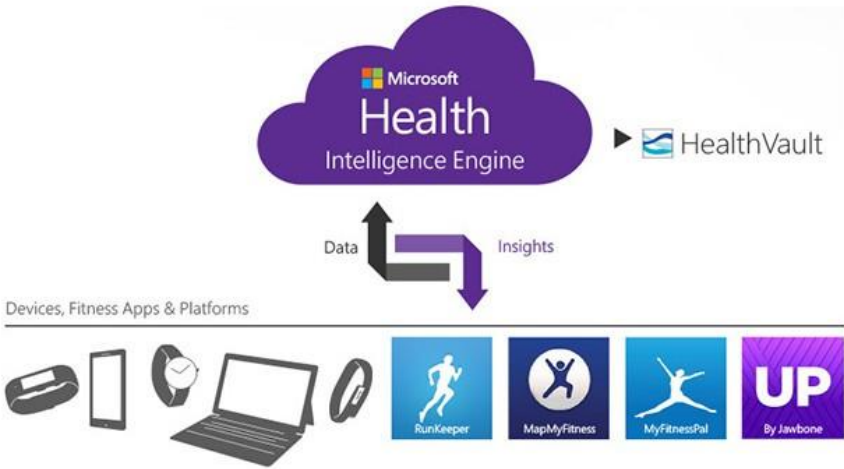


Connected
car

Emerging Consumer-Facing Health Information Platforms



Health.
An entirely new way to use your
health and fitness information.



Advertising Age

BtoB COVERAGE INSIDE

WHAT'S NEWS TO
WHAT'S NEXT

U.S./Canada \$9.99
U.K. £6.95
December 8, 2014

WE RANK THE
GLOBE'S BIGGEST
AD SPENDERS

PAGE 26

WITH FARBMAN
OUT, GAP HUNTS
FOR A CMO

PAGE 4

GAME FACE ON:

UNDER ARMOUR

NOTHING COULD SLOW DOWN OUR MARKETER OF THE YEAR PAGE 14

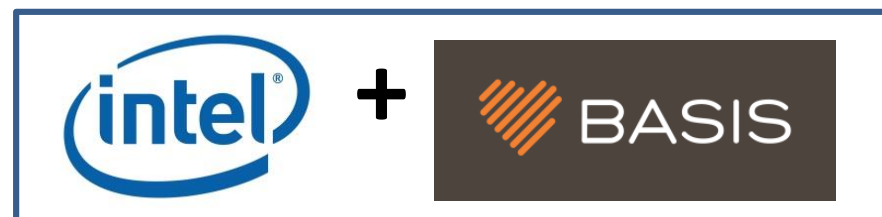
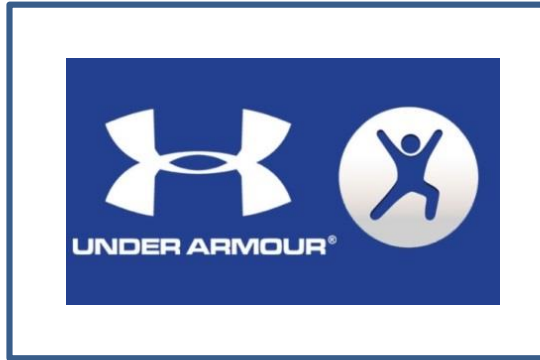
SEE THE ENTIRE A-LIST PAGE 16



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"Editor we sit here and go down with Nielsen or the industry builds a better mousetrap."—Lyle Schwartz, managing partner-director of research and marketplace analysis, GroupM, Page 10

Health IT Comes Together – Creation from Chaos





AND



CREATE JOINT VENTURE



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THINK-aways for **Himss** No-So California





The Person-Centered Health Ecosystem

Health Is Where People Live, Work, Play, Pray & Learn

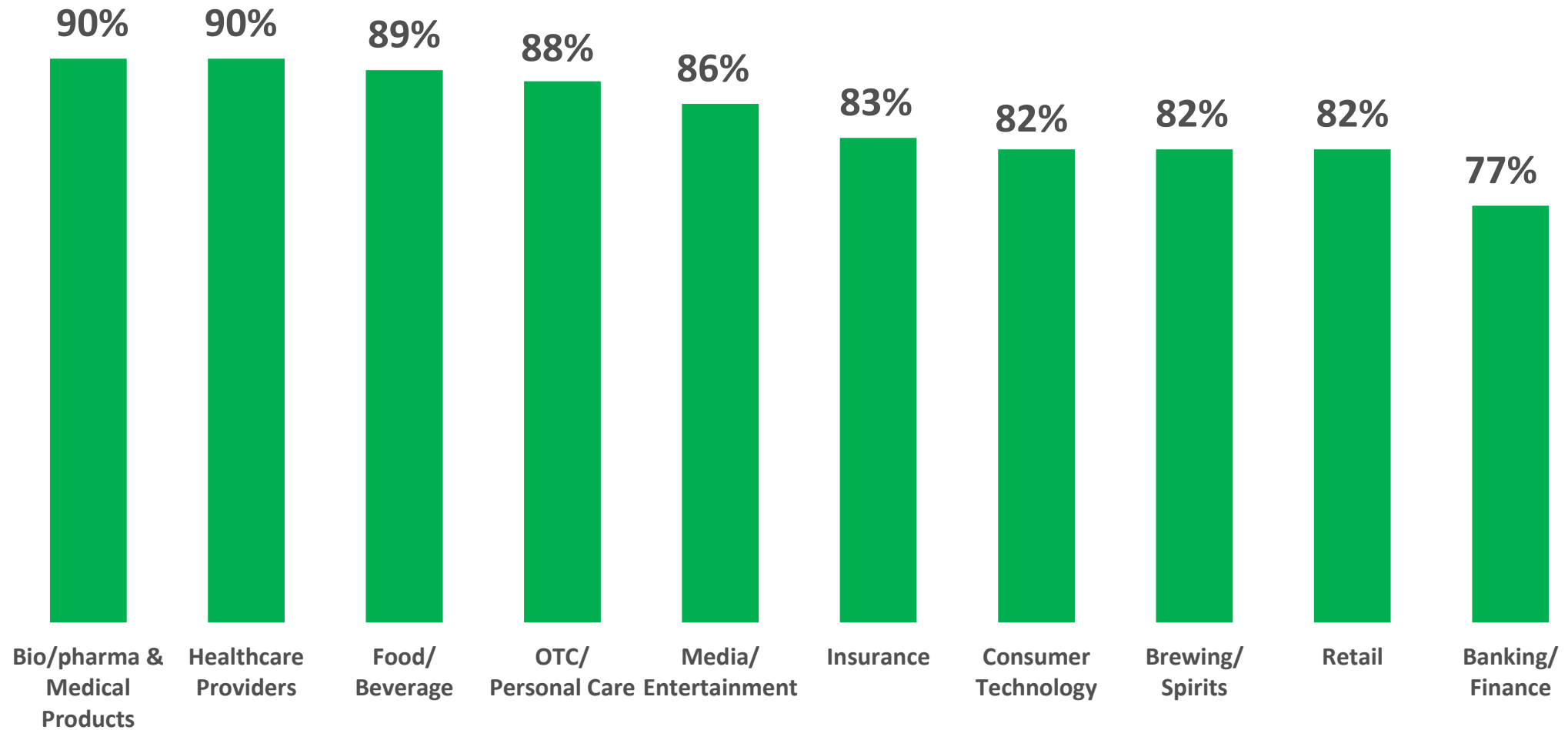
“Why Your ZIP Code May Be More Important to Your Health Than Your Genetic Code”

Remember the importance of Social Determinants of Health



Health is the new **green**

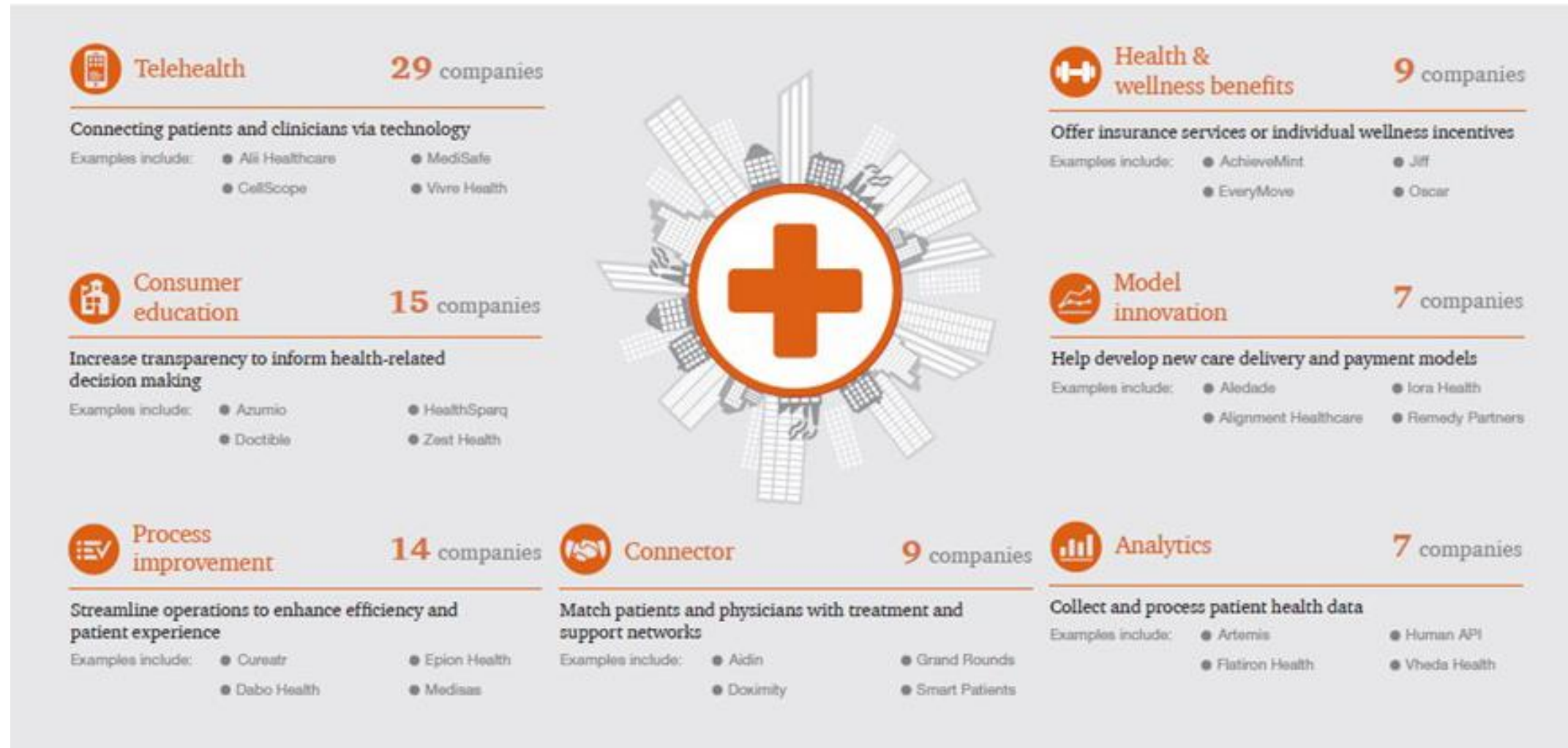
Consumers expect all industries to engage in health



Source: Edelman Health Barometer, 2010

A new cottage industry arises.

More than 90 new health companies have been created since 2010.



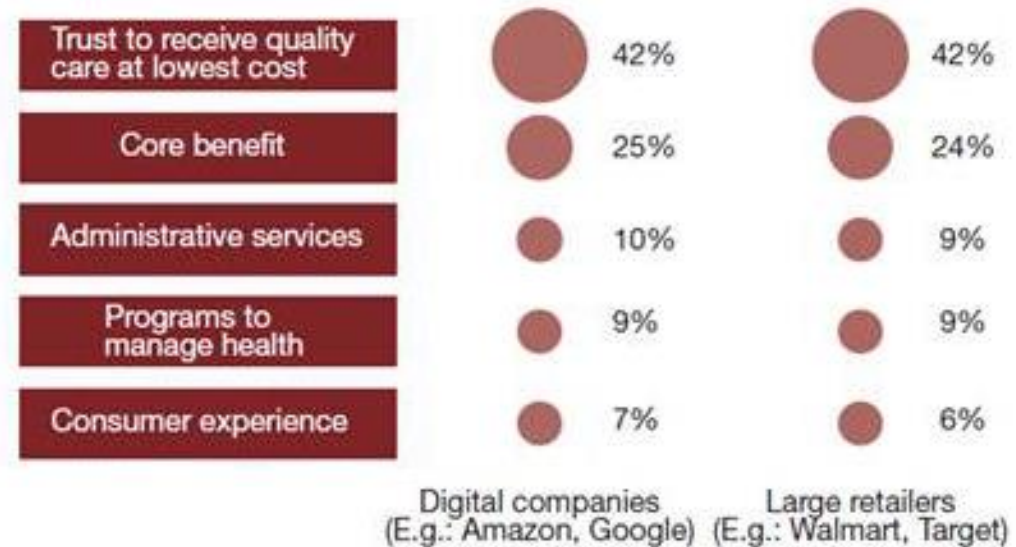
Consumers are willing to trust nontraditional companies

Level of Trust in Managing Consumers' Health



Source: Strategy& consumer survey 2014
N=2399

Reasons to Select Nontraditional Companies



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We asked consumers to rate how excited they'd be to experience a wearable technology product from a particular brand:

Brand	Very/Somewhat Excited
Apple	59%
Amazon	57%
Google	53%
Microsoft	51%
Nike	42%
Intel	35%
Target	35%
Disney	34%
Pixar	33%
Facebook	31%
Walmart	29%
Warner Bros.	29%
BMW	27%
Under Armour	27%
Starbucks	27%
Coca-Cola	26%
Toyota	26%
McDonald's	18%
GAP	17%
Patagonia	16%

Tech brands have the edge—Apple, Google, Intel and Microsoft all top the list. Amazon, too, ranks high—no doubt due to its innovative agenda over the past decade.



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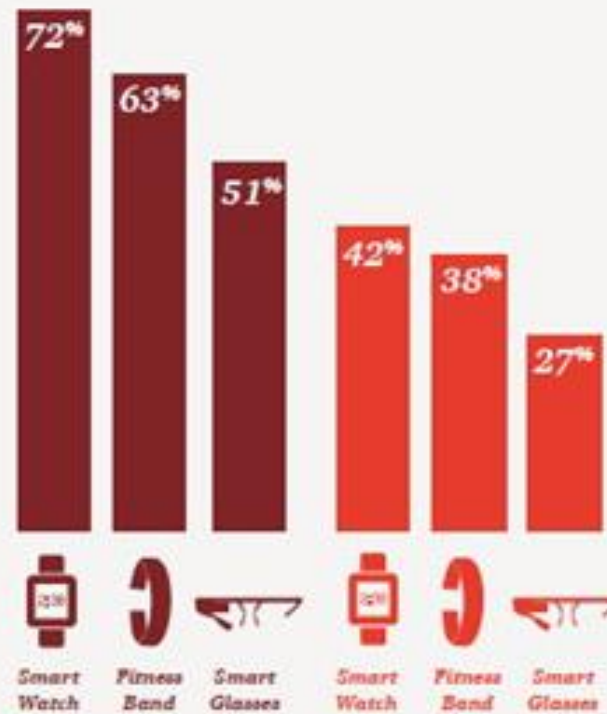
Enterprise will play a major role in subsidizing and mainstreaming devices.

Consumers are more willing to adopt technology if an institution pays for it.

An employer
pays for it

vs.

The consumer
pays \$100 for it



46%

of respondents say their company should fund the purchase of wearable tech



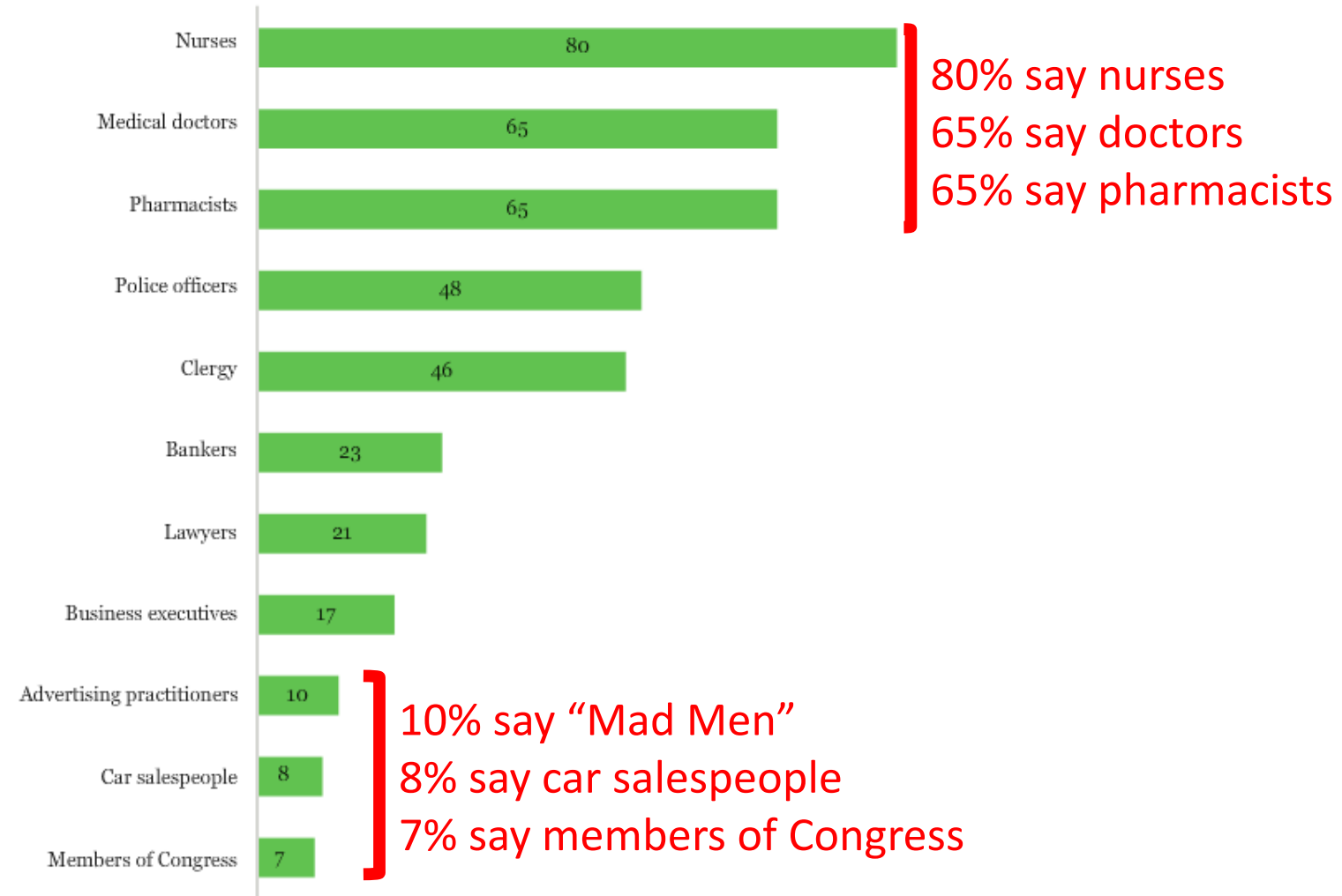
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Nurses, Doctors and Pharmacists Most Ethical Professions

Please tell me how you would rate the honesty and ethical standards of people in these different fields -- very high, high, average, low or very low?

Dec. 8-11, 2014

■ % Very high/High

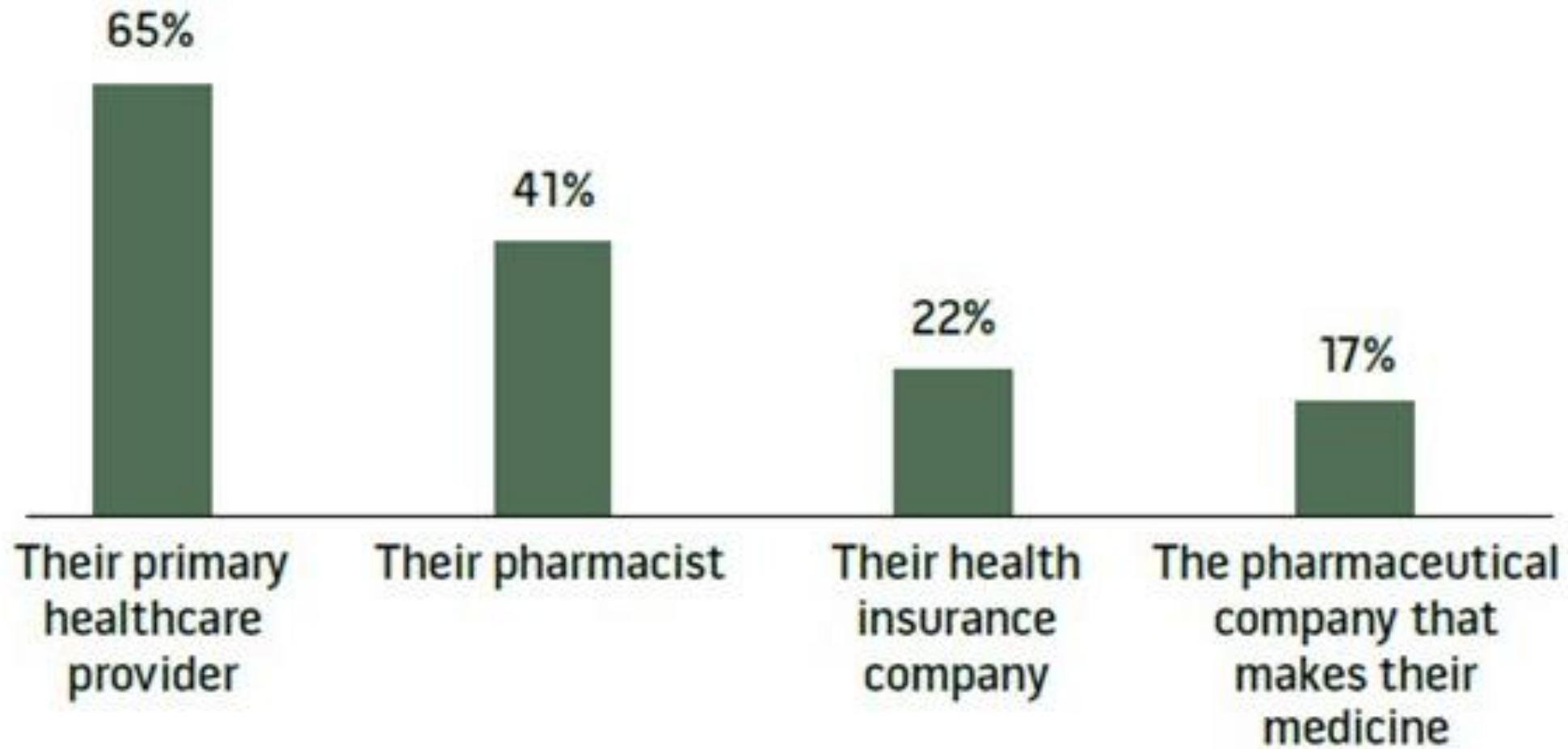


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Source: Gallup, Americans Rate Nurses Highest on Honesty, Ethical Standards, December 2014

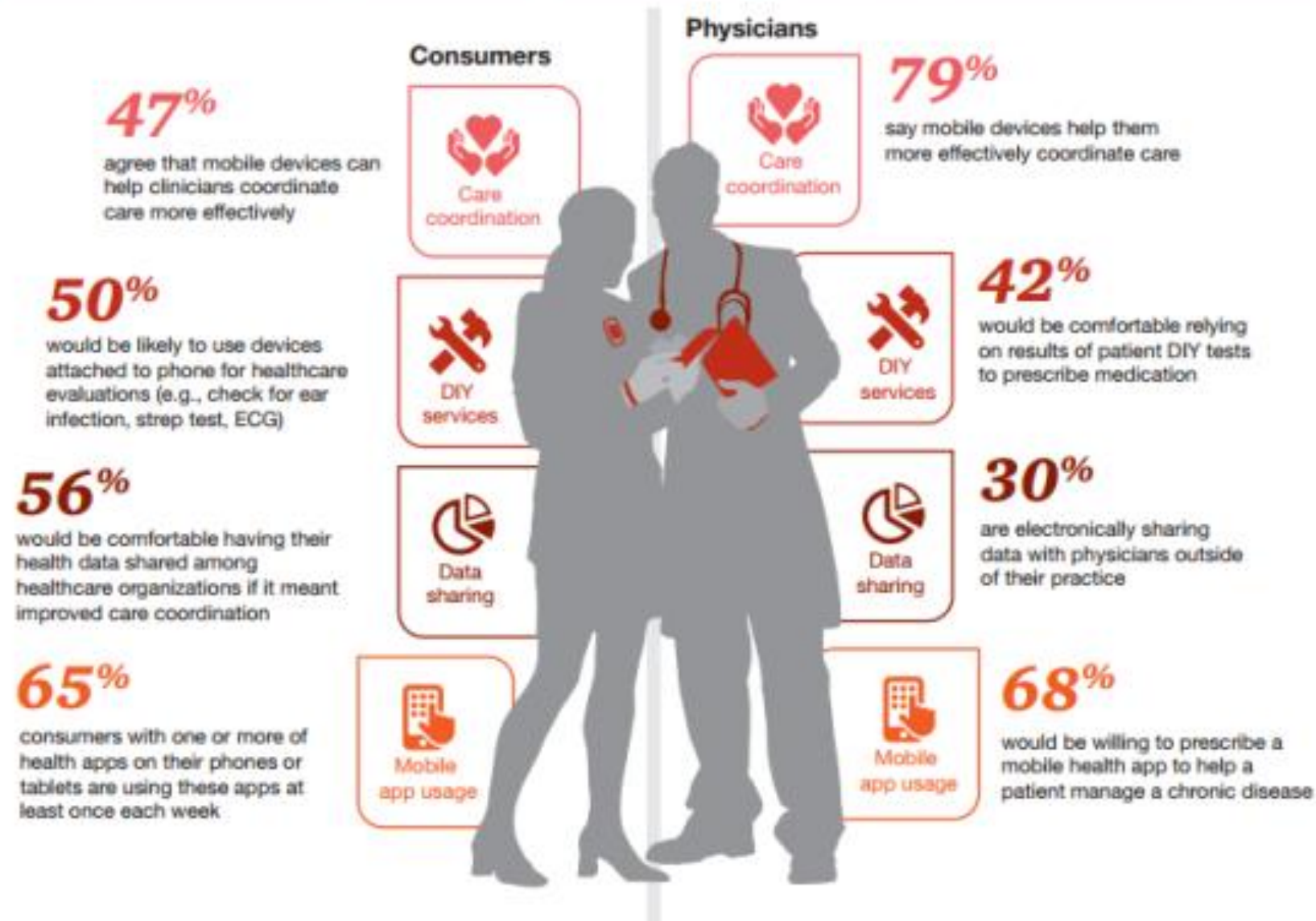
Women who trust... (All markets)



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Source: *The Power of the Purse: Engaging Women Decision Makers for Health Outcomes*, Center for Talent Innovation, April 2015

Figure 4: Clinicians and consumers appear on the same page about many things digital

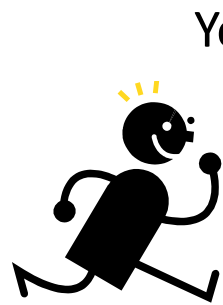


Source: 2014 HRI Clinician Workforce Survey and 2013 HRI Consumers Survey



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THINK-aways for **Himss** No-So California



You are in the business of behavior change

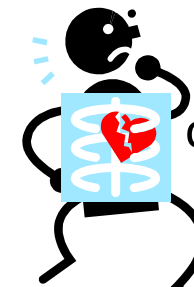
Embrace transparency and financial wellness, bolster trust and revenues



Be a health coach



Share health data: most consumers want and need to know their numbers



Be a marketer: consider patients' life-flows and health ecosystems



Ally/partner with other health ecosystem partners trusted & valued by consumers



THINK: retail in health



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DECEMBER 25, 2006 / JANUARY 1, 2007

www.time.com

TIME

PERSON OF THE YEAR

**You...
can do health.**



Yes, you.
You control the Information Age.
Welcome to your world.



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