Why healthcare engagement should be personalized, prioritized, and preemptive

A post-COVID perspective with key findings from Pega's 2021 Healthcare Engagement Survey

Executive foreword

Nothing is more personal than health. Many of us in healthcare technology have always centered our work on this belief. And it's even more critical in 2021 as patients return to the status quo after facing the COVID-19 pandemic.

After experiencing the world adjust to the new normal, we thought we would share the results of our most recent Healthcare Engagement Survey as it offers techniques for healthcare organizations to simplify patient journeys and continue to strengthen relationships with their patients and members.

The Healthcare Engagement Survey of more than 2,000 U.S. consumers and 200 healthcare industry leaders, was conducted in 2021 as a follow-up to our 2020 report. You'll discover many new insights that we've been able to uncover about patient and member perceptions as well as the COVID-19 public health crisis.

From our previous survey to now, many things have stayed the same:

- Better consumer engagement drives better health.
- Consumers want personalized healthcare and to feel like their doctor knows them.
- Healthcare tech preferences are changing, but organizations still have a long way to go to drive adoption.

One key difference, however, is how much more willing consumers are to stay loyal to their healthcare provider. For example, we noticed a 23% decrease year over year in the number of consumers who said they would switch doctors due to poor communication or engagement. That's a significant decrease, but one that we believe is temporary due to COVID-19 uncertainty.

In addition to increasing communication, healthcare organizations will need to provide consumers with the personalized, frictionless, and contextual service that they have come to expect from other industries.

This report contains key findings from our survey, and actionable steps you can take to build and maintain relationships with today's healthcare consumer. Now is the time to transform healthcare and make it more connected, simplified, and personalized for consumers – at this critical moment and in the future.

Kelli Bravo
Vice President, Healthcare and Life Sciences
Pegasystems

Survey says: It's time to rethink healthcare engagement

In recent years, the rate of change across the Healthcare industry has accelerated. And for healthcare organizations across the board – from doctors' offices to health insurers to pharmaceutical and drug companies – staying one step ahead of this change is key to strengthening engagement and providing exceptional consumer experiences.

In our 2021 survey of more than 2,000 consumers and 200 healthcare decision-makers, we noticed these key themes:

1. **COVID-19 has temporarily impacted patient loyalty and engagement by bringing patients and providers closer together – this is seen as an overall decrease in patients' likelihood to switch providers. However, providers will need to work hard to maintain a positive level of engagement.**
2. **Navigating the healthcare system is complex and confusing. Consumers want personalized engagement to motivate them on their health journey – with 65% of patients agreeing that communication from their doctors' offices makes them want to do more to improve their health.**
3. **Consumers are wary of healthcare technology but are open to solutions that improve their experiences.**

As we compared the previous survey results to 2021, our biggest takeaway is that we can no longer wait to make healthcare engagement more personalized, prioritized, and preemptive.

It gets personal

Growing consumer expectations across every industry poses a unique challenge for healthcare organizations. Consumers want healthcare providers to know them and understand their medical history, and they want health insurers to provide benefits tailored to their needs. So how are healthcare organizations measuring up?

Doctors' offices and health insurance companies need to sync up

1/2 of all respondents agree that their doctor and health insurance company are in sync and closely connected.

Health insurers do some things well – but have room to grow

49% of consumers agree that the wellness programs offered by their health insurers are useful and tailored to their needs.

84% of healthcare payer leaders surveyed agree that their organization designs wellness programs based on the needs of their members.

Peer recommendations are the future of personalization

Last year, just 37% of overall respondents agree that their family and friends help them make better choices about their health – now 56% are attributing better health choices to their social circles. It's clear that recommendations of health habits among peers are becoming increasingly important for the future generation of health plan members.

Communications channels need a personalized touch

While most healthcare consumers still prefer the phone as their mode of interaction with each type of healthcare organization, that's quickly changing.

76% of organizations believe they make it easy for patients to engage with them – by offering plenty of channels to engage with. When consumers are interacting with their doctors' offices, phone is the most popular method – with mobile apps and messaging apps like Facebook and WhatsApp following closely behind.

As other channels of communication become more common, such as chat and online portals, it is essential to find a way to deliver the same level of personalization that consumers currently receive over the phone.

Communication shows you care

When asked how valued communications from healthcare organizations make them feel, consumers made it clear that communication matters – and it even encourages them to take better action to improve their health. 65% of patients agree that communication from their doctor's office makes them want to do more to improve their health.

Yet in 2021, consumers are experiencing a temporary decrease in independence – even if they experience poor communication.

63% of respondents agree that they would switch doctors due to poor communication or engagement. This is a 23% decrease year over year.

77% of healthcare organizations strongly believe patients would switch due to poor engagement – up 103% year over year.

With many still feeling the effects of the pandemic, patients don't feel as inclined to find a new healthcare provider. But that's a temporary effect, and healthcare organizations are aware. Positive communication will go a long way in retaining your patients and making them feel valued. In fact, they want even more communication.

54% of consumers are happy with the level of communication they receive from their doctor's office.

32% of consumers want more communication from their doctor's office.

Simplifying the healthcare system

Intentionally or not, healthcare organizations maintain a system that is difficult to navigate. 52% of patients have little to no experience navigating the healthcare system – and that's costly. It adds up to more frustration for your consumers and an additional $3.4 billion spent on administration.[1] Consumers are ready and want to be in more control of the healthcare services available to them but need better transparency.

55%

of consumers say that navigating the healthcare system is difficult.

51%

of consumers say that their health insurer is able to tell them how much they'll owe before they get a procedure – up 16% since last year.

48%

of consumers believe that their health insurance benefits are easy to understand.

Consumers are looking to provider organizations to help them better navigate through their health needs. With 77% of health inquiries beginning with an online search,[2] consumers want organizations to provide more advanced tools that easily allow them to access their health information themselves.

58%

of consumers refill prescriptions online.

25%

of consumers monitor their health using connected devices.

17%

of consumers subscribe to alerts for their medication and treatments.

Many consumers haven't taken advantage of these tools yet – but only because the tools haven't satisfied their expectations. They're waiting for organizations to improve these experiences. And when they do, demand will skyrocket.

[1]Source: "The Hidden Cost of Healthcare System Complexity," Accenture, 2018.
[2]Source: Susannah Fox and Maeve Duggan, "Health Online 2013," Pew Research, January 15, 2013.

Bridging the gap

The level of information inconsistency consumers are receiving from health insurers is worrisome. 48% of consumers agree that they receive inconsistent information from insurers – that's a 20% increase from last year. Providing consistent messages – whether it concerns a wellness program or a chronic condition – builds consumer trust, which is essential to delivering personalized experiences.

But delivering personalized service is no longer enough on its own. Consumers expect healthcare providers, payers, and life sciences organizations to work together to deliver connected care. Our survey indicates that healthcare organizations recognize that they need to do better to provide a seamless experience.

78%

of healthcare organizations generally agree with the statement:

"My organization sends inconsistent information to our members/patients."

50%

of consumers generally agree with the statement:

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

A comparison in consumer trust: Doctors' offices vs. health insurers

The healthcare organizations that consumers interact with most often are doctors' offices and health insurers. So, we asked consumers how much trust and confidence they have in these organizations, and how they would feel about their adoption of new technology. **We found a clear disparity in the level of trust and confidence that consumers have in their doctors compared to their health insurers. In fact, while 73% of consumers have trust and confidence in their doctors' offices, only 43% have confidence in their health insurers, which is down 16% from 2020.**

When it comes to the use of advanced technology in their care, consumers favor their doctors adopting such approaches over their health insurers. While consumers are more trusting than they were in 2020, health insurers still have work to do if they wish to take advantage of innovative technology.

Real-time data access

Surveyed consumers at large have a greater level of trust in providing data access to their doctors versus their insurance companies.

63% **of consumers are open to giving their doctors real-time access to health information via connected devices and apps to improve health outcomes.**

Up 13% since last year,

53% **of consumers are open to giving their health insurers real-time access to health information via connected devices and apps to improve health outcomes.**

Artificial intelligence (AI)

Surveyed consumers trust their doctors just slightly more than their health insurers to use AI to make decisions about their health.

49% **of consumers are comfortable with their doctors using AI to make better decisions about their care.**

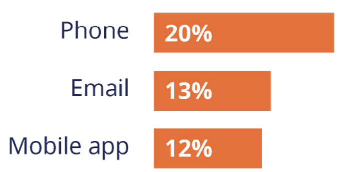
47% **of consumers are comfortable with their health insurers using AI to make better decisions about their care – up 14% since 2020.**

Serving the next generation of healthcare consumers

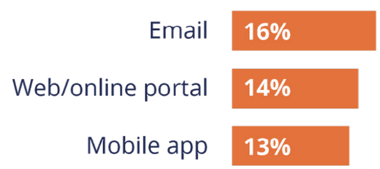
Healthcare organizations should look to younger generations of patients and plan members when determining how to improve the customer experience via digital technology. These digital-first consumers expect the same on-demand personalized service from the healthcare industry that they receive from consumer brands – all on their channel of choice. By far, phone wins out as the most common method used by consumers. But it's clear from the habits of healthcare organizations that more can be done to engage consumers on their channel of choice.

"What channels do healthcare organizations use the most?"

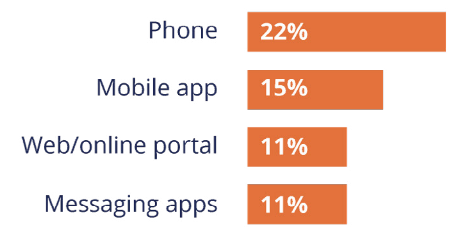
When connecting with **patients,** healthcare organizations use:



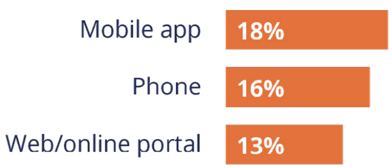
When connecting with **pharmaceutical/ drug companies,** healthcare organizations use:



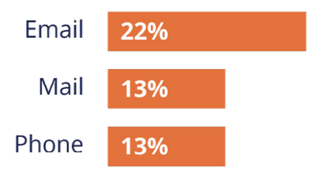
When connecting with **doctor's offices,** healthcare organizations use:



When connecting with **hospitals,** healthcare organizations use:



When connecting with **payers,** healthcare organizations use:



TAKING A CLOSER LOOK

Analyzing the effect of COVID-19 on engagement

COVID-19 shook up the healthcare industry in ways we haven't seen before. Organizations across the industry had to adapt to a new digital landscape overnight – something that the modern healthcare consumer has been wanting for years. This modern healthcare consumer wants more control over their healthcare story: They want to connect digitally across channels. They track disease states relentlessly. They won't tolerate delays or interruption.

49% **of consumers said they plan to use telehealth visits when appropriate from now on.**

46% **of consumers said that getting mental health services via virtual care/telehealth is as good or better than in person.**

Historically, consumers have been quick to switch providers after a negative experience – but not during the pandemic. Uncertainty has inspired loyalty in consumers. Yet as society begins to return to normalcy, consumers may feel inclined to start switching again. Healthcare organizations adapted quickly in 2020. But to keep their patients today, they will need to make further improvements to service and care delivery.

In 2021, 32% of our respondents were treated for COVID-19. And navigating the healthcare system for treatment wasn't always the easiest.

43% **of consumers felt their doctors were not adequately prepared to address their concerns about coronavirus.**

55% **of consumers said that navigating the healthcare system was difficult.**

51% **of consumers felt their health plan did not make it easy to pay for COVID-19 benefits.**

As we begin to come out the other side of the pandemic, half of respondents are feeling like their life is in a more positive place. But that also means half of respondents don't feel so positively. Organizations have an opportunity to address these problem areas while their patients are experiencing a temporary decline in consumer independence from the pandemic. However, less than 10% of organizations can move quickly enough to stay relevant to their patients and adapt to their needs. To succeed, organizations need to speed up the pace of their digital transformation and offer service that is contextual, consistent, and contiguous – while using AI to provide consumers with seamless experiences that are prioritized, proactive, and personal.

Preemptive engagement is the answer

From procedures to prescriptions, healthcare payments add up quickly. So, it's not surprising that consumers are concerned with the financial side of healthcare. Taking consumers' financial concerns into consideration can help increase confidence in your organization – and improve both health and business outcomes. Both consumers and healthcare organizations save money when consumers take better care of themselves.

How can your organization be more preemptive in helping consumers focus on their health and well-being?

More than half of consumers put off care due to cost. This is a huge missed opportunity – for patients across the board. Even amongst families with incomes over $125,000, 40% have expressed having at least one unmet social need due to cost – whether that's having no access to transportation to go to a doctor's office or living in a food desert with little access to healthy food options.[3]

54% **of consumers say that financial incentives and rewards encourage them to make healthy choices.**

63% **of consumers generally agree that they are more likely to focus on their health and well-being when they feel financially stable.**

It's difficult for patients and members to focus on their health when they are struggling to make ends meet. By offering financial incentives and rewards, healthcare organizations can improve consumers' financial stability, enabling them to make their health and well-being more of a priority. While it costs money to provide financial incentives up-front, it can save money – and even lives – in the long run.

[3]Source: "Social Needs in America," Kaiser Permanente Research, June 4, 2019.

"...positive communication goes a long way in making your patients feel valued. Poor communication can make them leave. COVID-19 has caused some uncertainty, but we foresee patients expecting better engagement as we settle into the new normal."

Anticipating consumer needs

Preemptive engagement is personalized in context, and delivered at the right time via the right channel. While consumers might not know the term, they are already looking for preemptive engagement. Although it may be impossible to preemptively address every situation and risk, there are plenty of instances where your organization can implement policies that empower your consumers.

Here are three ways to be more preemptive:

1. **Reward healthy choices**
   54% of consumers feel that financial incentives and rewards encourage them to make healthy choices. Promoting healthy behavior potentially reduces future health risks and engages patients and members in focusing on their health. And we know that patients who are engaged in their health journey are healthier overall.

2. **Offer personalized support**
   61% of consumers would use or currently use free nurse advice and support (from either their doctor's offices or health insurers) to help with their health condition. Proactively sending knowledge articles or vouchers for community-based wellness programs, based on a patient's needs, can also improve health journeys.

3. **Be accessible**
   93% of decision-makers say that their organization is exploring new technology to engage members/patients now or in the near future. Using the latest technology – such as chat, text, and web – to anticipate patient/member needs before they occur supports the vision of excellent preemptive service.

While it is promising that most healthcare decision-makers believe they are offering the latest technology for health consumer engagement, all healthcare organizations should strive to this level. Offering incentives to make healthier choices, orchestrating relevant wellness programs, and providing free nurse support can also help to improve the health of many patients and members.

Connecting the dots to personalized care

Healthcare is all about the connection: connecting consumers to the right care, connecting information from provider to payer to patient/member, and connecting with those you serve on an individual level. And after COVID-19, it's more necessary now than ever before.

All these connections come down to one-to-one engagement, which is why it's so important that you provide healthcare that's personalized, prioritized, and preemptive. Personalized experiences empower your consumers, simplify the delivery of healthcare, and drive better outcomes.

About Pegasystems

Pega delivers innovative software that crushes business complexity. From maximizing customer lifetime value to streamlining service to boosting efficiency, we help the world's leading brands solve problems fast and transform for tomorrow. Pega clients make better decisions and get work done with real-time AI and intelligent automation. And, since 1983, we've built our scalable architecture and low-code platform to stay ahead of rapid change. Our solutions save people time, so our clients' employees and customers can get back to what matters most.

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