

PATIENT HEROES

Patient heroes have the power to positively change the status quo because of their influence, knowledge, passion, and commitment to improving the patient journey.

\$70.5

BILLION

the projected
market value
of the global
patient
engagement
solutions market.

The global patient engagement solutions market size is expected to reach \$70.5 billion by 2028, according to a new report by Grand View Research. The market is expected to expand at a CAGR of 21.4% from 2021 to 2028. Driving the market is the expected exponential growth due to the adoption of mHealth; increasing prevalence of chronic conditions such as diabetes, asthma, and arthritis; improved healthcare services; enhanced patient education; patient data tracking; and diagnostic treatments.

Over the past year, as healthcare providers were battling with the constant upsurge in numerous cases, patients were looking to digital technologies for the support that promoted the adoption of a product. The pandemic has resulted in the introduction of multiple COVID-

19- related patient engagement solutions by various players. The growing number of smartphone users around the globe expedited the adoption of mHealth across the sector both from providers and consumers, which in turn, has augmented the dependability of patients on mHealth apps.

While technologies and solutions are certainly part of the equation to solving the myriad challenges patients face on a daily basis, it's the people who are the real game changers. These are individuals who go the extra mile to better serve patients and patient communities. Their dedication to making a difference is often rooted in their own personal stories, and their lights shine bright as beacons of hope for those they serve.

Patient Engagement Trends

- 1. The web:** Web-based/cloud-based solutions emerged as the largest delivery type segment in 2020 and accounted for more than an 80% revenue share as it supports hassle-free information flow between patients and healthcare providers. Moreover, bulk data can be stored in these platforms and enable remote access to information on almost every aspect of an illness or disorder.
- 2. Software:** The software segment dominated the market in 2020, owing to continuous development in patient engagement solutions along with its increasing applications in consulting, education, and implementation. Software solutions are easy to install and use, enable quick access to specific drug information, and enable healthcare providers to digitally upload prescriptions.
- 3. Value-based competition:** Companies are adopting various strategies to sustain competition. New product/solution development, partnerships, mergers, acquisitions, strategic collaborations, and geographical penetration are some of the key strategies adopted by market players.
- 4. Chronic diseases:** Rising prevalence of chronic diseases such as cardiovascular diseases, obesity, and diabetes, which require constant monitoring, is expected to drive the demand for patient-engagement services in the coming years.

As Telehealth Use Grows and Satisfaction Varies, How Can Gaps Be Addressed?

For people living with chronic health conditions, telehealth has been an invaluable asset, providing an essential lifeline to healthcare professionals and important resources as they navigate the difficult terrain of health management during a global pandemic.

As a result of the emerging use of telehealth as an additional access point to care, understanding the experiences and perceptions of these individuals, many of whom are considered high-risk for COVID-19, may help shine a light on how to optimize their experience.

To better understand the needs and experiences of chronic condition populations, Health Union conducted an online survey of 2,210 people that finished fielding in May 2020. At that time, 49% of respondents - all living with chronic conditions - had participated in a virtual visit with an HCP over the previous four months. A deeper dive into the findings provides a great deal of insight into what people want and need from the experience, as well as telehealth's potential future role within healthcare.

Breaking Down Telehealth Use

When assessing telehealth engagement across socio-demographics, a few comparisons stand out.

The survey revealed a higher proportion of women engaged in telehealth than men (50% vs. 43%). Respondents earning household incomes over \$100,000 were more likely than those earning less than \$30,000 (53% vs. 45%) to have used telehealth. In terms of educational attainment levels, a greater percentage of college or trade school graduates engaged in telehealth than those who completed high school or below (49% vs. 39%).

Unsurprisingly, telehealth use decreased as age increased. While 59% of those under 40 and 54% of those ages 40-55 used telehealth, only 45% of individuals 56 and up used it.

This research also dove into specific experiences and viewpoints around telehealth use. While 40% of participants initiated telehealth care due to the pandemic, more than a quarter said they would be interested in pursuing it after the pandemic.

Looking at telehealth use by disease characteristics and patient concerns provides an understanding of how experiences and perceptions change based on condition needs. For example, respondents living with cystic fibrosis, lupus and ankylosing spondylitis recorded the highest proportions of telehealth users over the previous four months. Those who used telehealth also reported feeling at higher risk of severe disease due to COVID-19.

Varying Satisfaction Levels Compared to In-Person Visits

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Opportunities That Address Patient Needs

There is stated interest. Although 43% of respondents said they wanted to return to in-person appointments in the future, 27% reported a desire to use telehealth after the pandemic subsides. Decisions about use will depend on various factors, including the reason for the medical visit and physician availability, but the convenience factor will likely remain a draw post-quarantine. In fact, respondents who felt they were at greater risk of COVID-19 were more likely to use telehealth, suggesting the technology is valuable for individuals who are immunocompromised.

Adoption by older patients is possible despite some obstacles. Adults over 55 were more likely than younger respondents to express having no interest in telehealth and rate the technology as difficult to use. However, nearly half started using telehealth in response to COVID-19. This demonstrates adoption is feasible if benefits outweigh perceived drawbacks.

Make the technology easy and accessible. The findings demonstrate individuals with lower household incomes were more satisfied with their experiences. Interestingly, however, according to Pew Research, people in lower income brackets tend to have the lowest technology adoption rates in terms of device or broadband access. These results suggest value in telehealth as an access point that also incorporates phone visits. Additionally, the survey revealed 74% of respondents who had spoken with an HCP about the virus did so over the phone. For older patients and those in rural populations with less access, "simpler" technology could reduce some of the obstacles while still providing an efficient telehealth experience.

Patients can benefit from knowing about telehealth. Those who had the most positive telehealth experiences were also least likely to hear about telehealth from their doctor's office. As practices look to extend telehealth services post-pandemic, informing patients of its availability as an access point may be instrumental in increasing uptake and maintaining continuity of care.

"Telemedicine Use and Health-Related Concerns of Patients With Chronic Conditions During COVID-19: Survey of Members of Online Health Communities," was [published in February 2021 in the Journal of Medical Internet Research](#).

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