



The Power of the Patient: THE ERA OF HEALTHCARE CONSUMERISM

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The healthcare industry is currently changing due to intense pressure from rising costs. With estimates that chronic conditions account for more than 75% of healthcare costs in the USA, the traditional healthcare model is reacting by becoming less of a business-to-business model, and shifting towards business-to-consumer, in an effort to increase patient engagement. This step-change towards healthcare consumerism means that healthcare providers are increasingly targeting their products towards patients to help them become more engaged in their own healthcare decision-making along their journey as a patient, focusing on quality and convenience. With this in mind, healthcare stakeholders must adjust to new ways of patient engagement to accommodate their needs.

A Look Back to Look Ahead

Before we examine how consumerism is changing the way healthcare providers engage with patients, let us look back at the historical problems facing patients trying to control and monitor their conditions. It became clear that improvements were not only needed — they were essential. The facts laid themselves bare: a basic lack of patient engagement; the inability of the patient to access their medical data; the patient not being supported with the right information at the right time; little or no transparency on their conditions and what their treatments would require; and poor access to the healthcare professionals. If healthcare consumerism is here to stay (and we see no reason to think otherwise) it is for the benefit of not only the patient, but the entire healthcare industry that these mistakes are eradicated, and that steps are taken to approach the treatment of chronic conditions in different, more innovative ways.

The numbers involved are quite staggering. Taking diabetes as an example; in the US alone, there are around 24 million diabetes sufferers. While 18 million of those are diagnosed, only 15 million actually receive treatment. Of that

number, as little as 6 million patients are well controlled and feel as though they are on a journey that will lead to them taking charge of their condition. Clearly, this is not healthcare consumerism as we know it, and this is not just a concern for patients, but also the healthcare professionals (HCPs) and payers. It is estimated that increased patient engagement could decrease care costs of the US diabetes patients from as much as \$8,867 to \$4,570 per year, resulting in a \$4,297 saving per patient. Simple economics show us that by engaging with the patient in a way that will help them understand their condition and empower them to monitor it remotely, not only can the patient take charge of their own lives — and become the consumer, but this cost will come spiraling down.

Enter mHealth — The Key to Viable Healthcare Consumerism

If we are to embrace the era of healthcare consumerism head on, then we need to realize that mobile technology is ideally placed to help meet this challenge. Access to mobile and digital technology has seen huge growth in recent years; there are estimated to be 6.9 billion mobile subscriptions globally and 96% of the world population is now said to have access to mobile technology. Alongside this growth, the use of mobile technology has changed dramatically across the globe; from checking bus timetables through to highly regulatory activities such as mobile banking, we expect to use phones to find information and complete transactions as part of everyday life, and healthcare is no exception! As a result, mobile technology is being implemented across the world to help patients manage their conditions, with the mHealth market estimated to have reached \$4.5 billion in 2013.

The term 'mHealth' is often used to describe the rapidly growing market for health and wellbeing apps. This market is predominantly consumer facing, and typically consists of relatively basic services with a singular focus; activity tracking, diet monitoring or providing condition specific information. As a result,

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these limited scope apps can often be static and research has found that user attention span is relatively short-lived with an average of only 3.7 uses per week, and less than a third of users are retained for 90 days.

So, if mHealth is to truly revolutionize health outcomes, there needs to be a paradigm shift in what it can achieve in terms of patient engagement. mHealth is not simply about patients downloading apps to their mobile devices which do nothing more than display simple metrics; it is all about providing dynamic programs that help patients as they become consumers of healthcare to manage their conditions and improve health outcomes. The key to a successful mHealth program is to engage patients over extended periods of times. This can be done by building integrated systems that use a variety of input materials (medication tracking, medical or lifestyle device data) and patient assessments — diaries and questionnaires — to tailor responses, which, for example, could be dashboards, content on a portal or au-

