

The 2017 HealthMine Health Intelligence Report

Communication and Digital Healthcare Tools

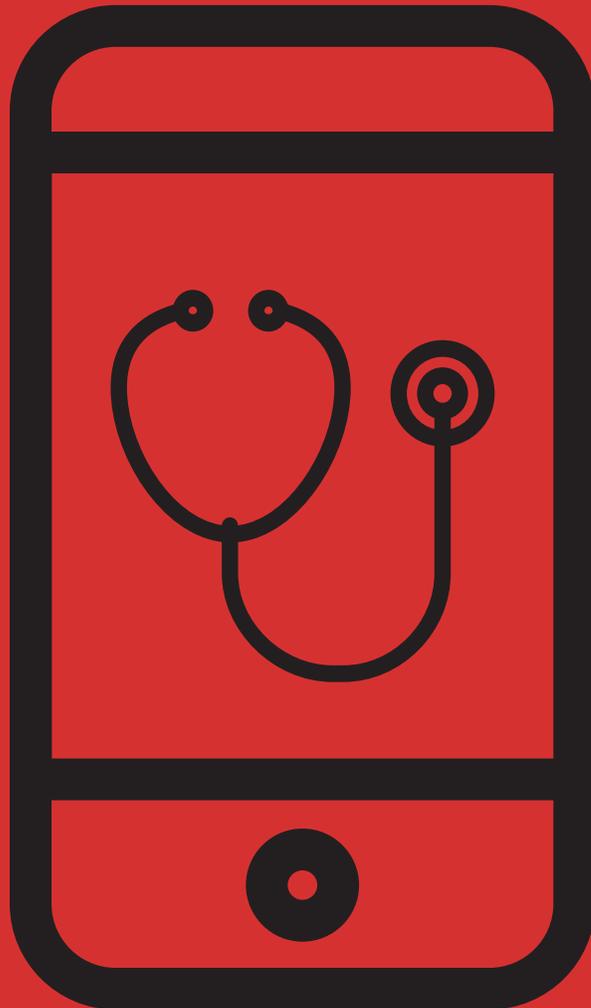
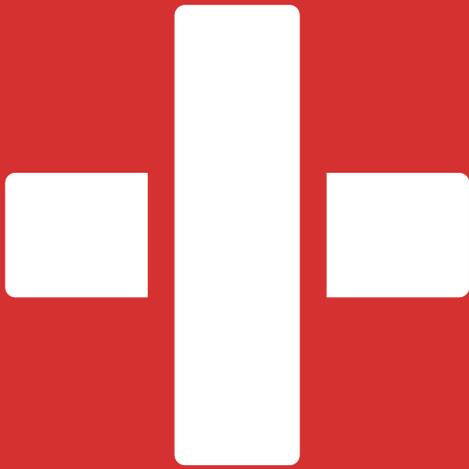


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Overview

The objective of the *HealthMine Health Intelligence Report: Communication and Digital Healthcare Tools* is to give health plan sponsors insight into member attitudes and desires about health plan communication and digital connections. Data and analysis in this report may be useful to executives and benefits leaders in guiding the strategy and design of their programs and technology systems to maximize impact and effectiveness.

Data for this report was gathered from the *HealthMine Health Intelligence Survey*, fielded in the first quarter of 2017 to consumers who have sponsored health insurance.

Respondents are adults between the ages of 26 and 64. Throughout the report, respondents are referred to as “consumers,” “members,” and “insureds.” Consumers/members/insureds are plan participants who either are members of a sponsored health plan, as employees or as spouses/dependents of the primary insured person, or have purchased a plan directly from an insurance carrier or on a public exchange.

Standard questions, covered in these and future surveys, include consumers’ perception of health plan communications and digital offerings.



About the Survey

The HealthMine Health Intelligence Survey of 750 consumers enrolled in a sponsored insurance plan was fielded in January of 2017.

Seventy-five percent (75%) had insurance through their employer or spouse's employer, while 25% had purchased their own insurance.

Our survey shows that most members believe health plan communications are impersonal and centered around bills rather than healthcare guidance. Most members are either disconnected from, or rarely visit their health plans on social media and member portals. Additionally, many members feel they are missing valuable guidance from their plans around digital health data and price transparency.

Top Findings

+ Communication and Insight

73% of respondents don't think their insurance plan understands their personal health very well; 60% want more communication from health plan sponsors other than bills

+ Chronic Disease

52% of consumers with chronic conditions hear from their health plan just once per year or less about their disease

+ Social Media

63% of health plan members are disconnected from their plan on social media; but 78% who do follow their health plan on social media say it's helpful

+ Member Portals

Just 21% of insureds regularly use their health plan's member portal; only 30% say their plan's member portal helps them answer healthcare questions digitally

+ Digital Health Tools

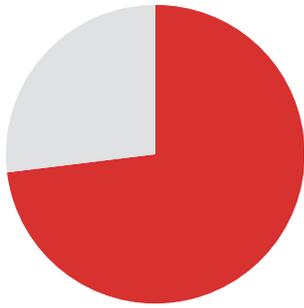
83% of consumers say they use digital health tools; but only 22% say health plans are utilizing the data to give guidance

+ Price Transparency Tools

39% of consumers say their health plan does not offer a price transparency tool

Health Plan Communication and Insight

More Americans now have health insurance than ever before, but many feel that they are not getting individualized healthcare guidance. Sixty-one percent (61%) of consumers believe that their health plan gives similar incentives and recommendations to the entire population, rather than personalized direction. Additionally, nearly three quarters of members (73%) don't think their insurance plan understands their health very well.



73% of respondents don't think their insurance plan understands their health very well

Which of the following statement do you believe is most true? "My health plan..."

Answer	Percent
Gives similar incentives and recommendations to the entire population	61%
Gives me personalized incentives and recommendations that are specific to my health	39%

Thirty percent of respondents said their plan's communication with them was "impersonal" or "mass oriented." Another 22% said their plan's communication with them occurred "only around my bills."

Which of the following statement do you believe is most true? "My health plan's communication with me is..."

Answer	Percent
Impersonal/mass-oriented	30%
Personal to my gender and demographics	16%
Highly personal—customized for my individual health needs	32%
Only around my bills	22%

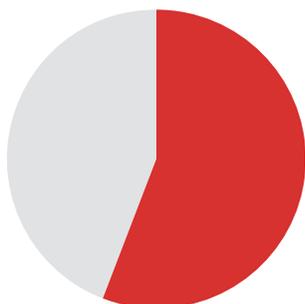
Sixty percent (60%) of insured consumers report that they want more frequent communication from their health plan not related to fees or coverage. And just 35% of respondents report that their health plan sponsor communicates with them about the state of their health and their health risks.

Health Plan Communication

Topic	My health plan communicates about this	I would like my health plan to communicate about this THROUGHOUT the year
Answer	Percent	Percent
Chronic condition	39%	45%
Fees/coverage after services	42%	41%
Recommended health screenings	55%	53%
Info. collected from my digital health tools	25%	33%
How to lower my healthcare costs	29%	54%

Health plans have more data than ever about each member, thanks to the growing digitization of healthcare--but they're not necessarily deriving value from it. Health data creates value when plan sponsors can share it with members and translate it into health intelligence. Health intelligence provides personalized insight, personalized clinical guidance and personalized incentives for members to close gaps in care.

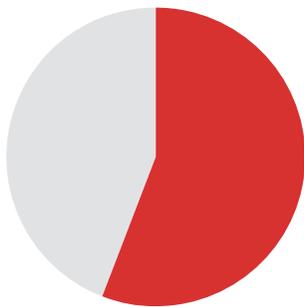
To grow engagement and satisfaction, health plans must evolve communication with members beyond fees and coverage to individualized health guidance that includes closing gaps in care, managing chronic disease, and lowering costs.



60% of insureds want more communication from health plan sponsors not about bills

Chronic Conditions

Most insured Americans with chronic disease are not getting much guidance from their health plan sponsors. Approximately one out of two Americans has a chronic condition (CDC), and chronic conditions are the biggest driver of the United States' \$3.2 Trillion healthcare bill. But 26% of insured consumers with chronic disease hear from their health plan only once per year about their condition. Another 21% report that their health plan never communicates with them at all about their disease. Five percent (5%) of members with chronic disease say their plan does not even know about their condition. Forty-six percent of respondents said they had one or more chronic condition.



52% of consumers with chronic conditions hear from their health plan just once per year or less about their disease

Does Your Health Plan Communicate With You About Your Chronic Condition?

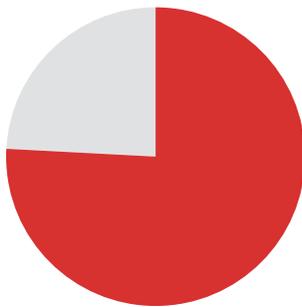
Answer	Percent
Yes, 2-6 times per year	35%
Yes, one time per year	26%
No, never	21%
Yes, every month or more frequently	14%
My plan does not know about my condition	5%
I never search for a doctor	2%

All respondents were enrolled in a wellness program through their health plan, but three quarters (75%) said they were not receiving any reminders or recommendations about their chronic condition.

Does your health plan send you any reminders or recommendations about your chronic condition?

Answer	Percent
No	75%
Yes	25%

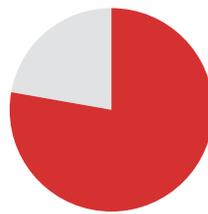
People with chronic conditions spend 99% of their time outside of the doctor’s office. What they do in that time determines the quality of their health—and the cost of their healthcare. Plan sponsors can help by equipping members with health intelligence and tools to help themselves. If plan sponsors communicate strategically, they can help teach members how to manage their own conditions. That, in turn, will help them become better users of healthcare dollars.



75% not receiving reminders or recommendations about their chronic condition

Social Media

Seven out of ten Americans use social media to connect with one another, engage with news content, and share information (PewResearchCenter). But, six out of ten Americans are disconnected from their health plans on social media.



only **37%** of health plan members are connected to plan on social media

but **78%** who do follow their health plan on social media say it's helpful

Are you connected to your health plan on social media?*

Answer	Percent
Facebook	31%
LinkedIn	10%
Twitter	17%
Instagram	17%
Total connected	37%

Social media is an important communication tool for the healthcare industry to connect with, engage and help members better manage their health. For many, it is a direct pipeline to the topics, trends and events affecting them in real time. Social media is a factor in humanizing an organization and building trust with members. Among the 37% of respondents who do follow their health plans on social media, 78% said the information their plan posted was helpful.

* Total percentages may exceed 100% because respondents were able to choose multiple responses.

Does your plan give you helpful information on social media?

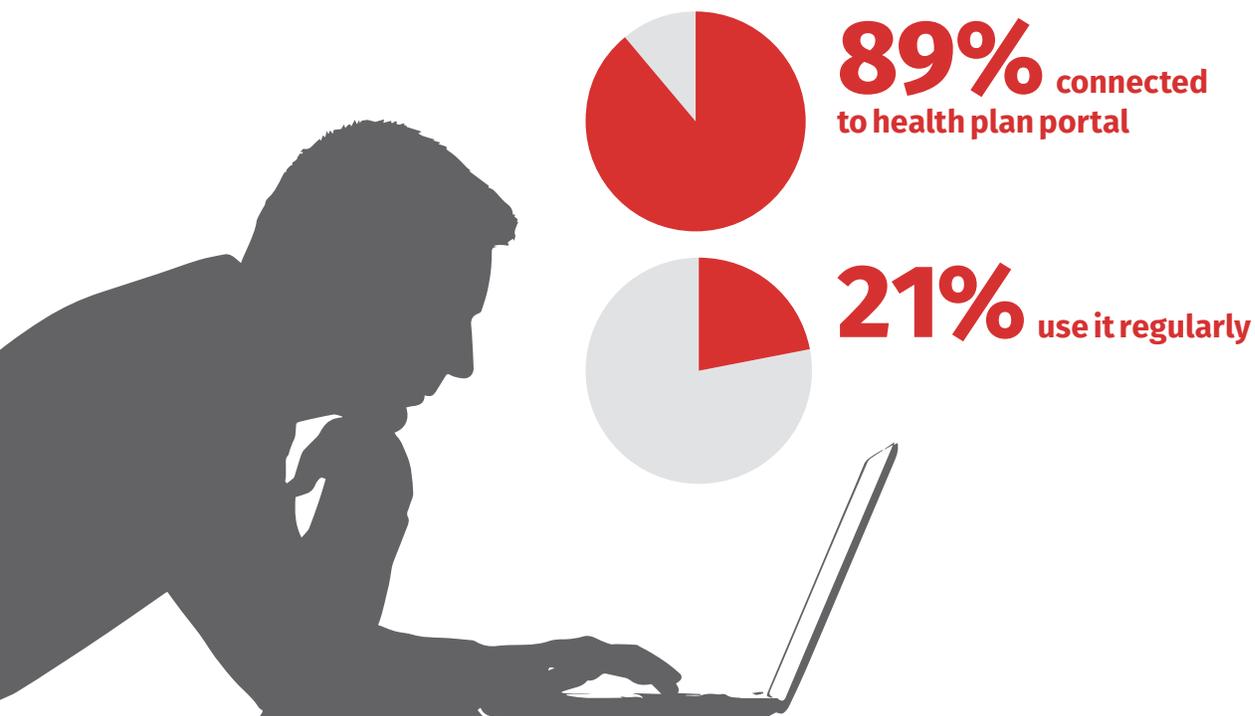
Answer	Percent
Yes	78%
No	22%

Health plans should optimize every communication tool to meet members on their terms. Social media is a growing venue for plans to effectively educate members with preventive information, tools and strategies for health behavior change and other important data.



Member Portals

Member portals are an important channel for health plans to communicate digitally with their members. While 89% of members say they are connected to their health plan through a member portal, only 21% use their portal regularly.



Are you connected to your health plan online through a member portal?

Answer	Percent
Yes, and I use it sometimes	32%
Yes, but I rarely use it	24%
Yes, and I use it regularly	21%
No	11%
Yes, but I do not use it	8%
Yes, and I would use it more if there was a good mobile experience	4%

Just 30% of respondents said they were able to find answers to most of their healthcare questions through their member portal, without requiring a phone call.

Is your member portal able to answer most of your questions online?

Answer	Percent
Some of the time	52%
Yes, most of the time	30%
Rarely	14%
No, not at all	5%

The reasons for low member portal utilization are varied, and include confusing navigation and a lack of motivation or incentive for usage.

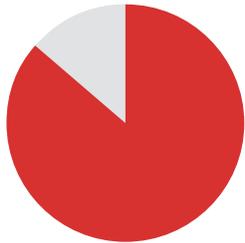
What is the primary reason you don't utilize your health plan's member portal?

Answer	Percent
Too confusing to navigate	24%
No incentives	21%
I don't know how	20%
Doesn't help me	18%
Not relevant to me	17%

Getting members to digitally connect to their health plans requires that plans provide useful data--and do so on a daily basis. As health plans seek higher engagement and customer satisfaction, they must find ways to deliver information that fits into each plan member's life and help guide them each day with relevant attainable health actions. Member portals are one place where health plans can translate tremendous amounts of health data into key insights that make members more aware, and more intelligent about managing their own health.

Digital Health Tools

As consumers seek greater choice and flexibility in managing their health, they are increasingly turning to digital health tools. Eighty-three percent (83%) of consumers report using one or more digital health tools.



83% of consumers
say they use digital health tools



but only **22%** say health
plans are utilizing the data
to give guidance

Fifty-five percent (55%) of consumers report using fitness/exercise applications--more than any other digital health tool. In a March 2016 HealthMine survey, 50% of consumers said they were using a fitness/exercise app. Thirty-five percent (35%) of respondents report using a nutrition app, down from 46% reported usage in 2016.

Although telemedicine remains one of the least utilized digital healthcare services, its popularity is growing. Ten percent (10%) of respondents report using a telemedicine app in 2017, up from 5% in 2016.

Despite growing consumer adoption of digital health services, most health plan sponsors are either not connected to, or not integrating digital health information into members' plans. Just 22% of respondents said their health plan sends them reminders or recommendations based on information from their digital health tools.

If health plan sponsors aren't connected to members' health data, they won't be able to deliver intelligent information or prioritize actions for population health. Plans need to integrate digital health information with provider data and apply it to help educate and guide patients. Then they can begin to realize the promise of digital health to lower costs.

Price Transparency

Consumers can take better control over their health care costs if they know the prices of health services before they receive them. But 39% of insured consumers say their health plan does not offer a tool to help them predict their costs.



39% of Consumers Say Health Plan Does Not Offer Price Transparency Tool

Providing healthcare prices to consumers could reduce U.S. healthcare spending by more than \$100 billion during the next decade, according to a 2014 report by the Gary and Mary West Health Policy Center. Yet most payers are not giving their members access to tools that will help them predict the cost of healthcare services, provider visits, or drug prescriptions.

My health plan offers a digital tool to help me predict the cost of a...

Answer	Percent
Nothing—no tool to predict healthcare costs	39%
Doctor visit	38%
Drug prescription	37%
Healthcare service (imaging, lab, other procedure)	36%
Not relevant to me	17%

Consumers don't shop for cars, electronics or groceries without knowing the prices—but they'll blindly purchase healthcare services without knowledge of the cost. Health plan sponsors have a responsibility to raise the health intelligence of their members, and price transparency is an easy place to start. Smarter healthcare consumers result in healthier populations with lower medical bills.

Conclusion

Health plans must first connect to their members before they can raise the health intelligence of their population and the plan itself. Aggregate member data can, with rigorous analysis, drive business improvement. Health intelligence provides insight into health status and risk, clinical guidance on necessary health actions, and personalized motivation to close gaps in care. To increase health intelligence in a population, health plans must first create strong digital connections both across the plan and out to their members. Through better digital connections, health plans can keep members engaged with more relevant communication, close gaps in care, and deliver real-time guidance that improves health outcomes and lowers costs.

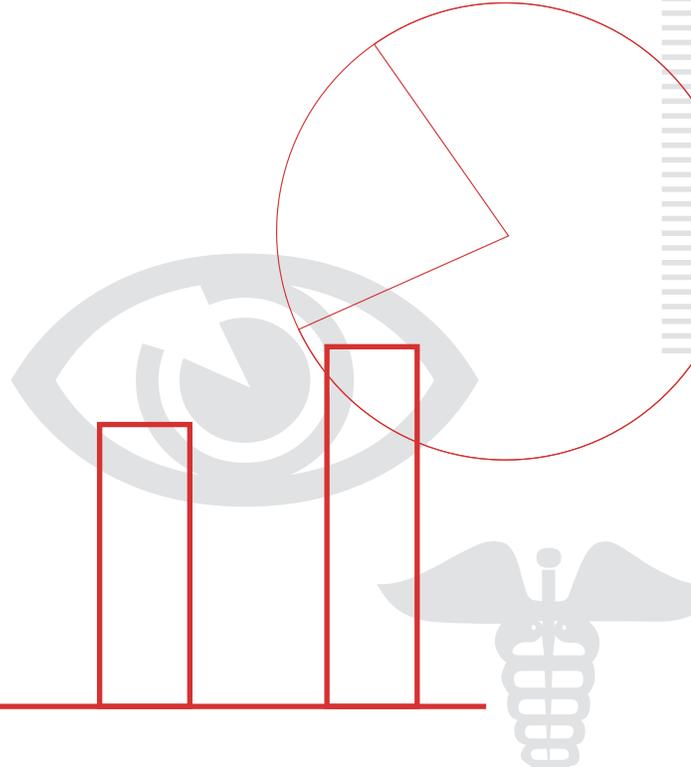
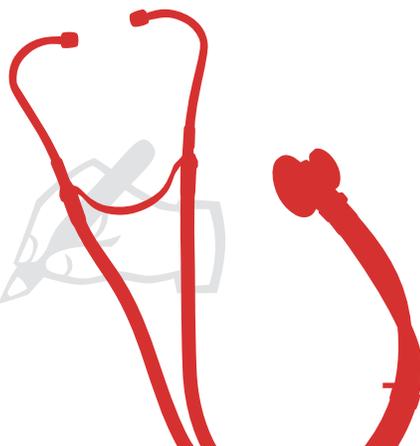
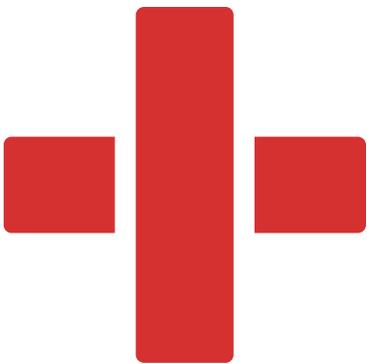


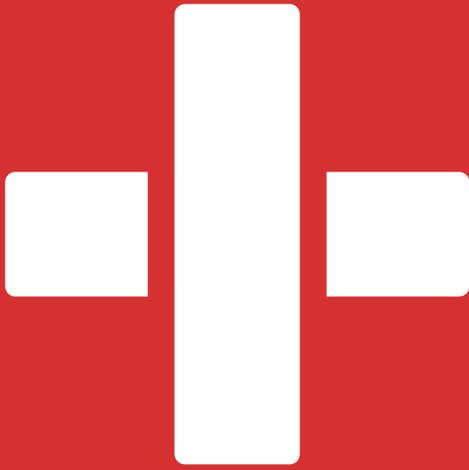
HealthMine is a leading healthcare technology company that delivers Health Intelligence for plan members and plan sponsors. HealthMine's cloud-based Health Intelligence Solution facilitates better health outcomes and lowers healthcare costs by providing: 1) insight into health status and risk, 2) clinical guidance on necessary health actions, 3) personalized motivation to close gaps in care and 4) measurement of outcomes. The Health Intelligence Solution derives business value from all clinical and lifestyle health data including data from existing wellness programs. HealthMine has more than 1 million users and has saved health plan sponsors more than \$100 million in healthcare costs. HealthMine is on the web at www.healthmine.com

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