

# Homes as Healthcare Hubs

The transformative healthcare landscape that is influencing the big shift to home as the healthcare hub.

The COVID-19 pandemic made home health for more than the elderly – people of all ages began to find ways to connect with clinicians from the safety and comfort of their homes. While some behaviors will certainly change as COVID-19 numbers continue to decline, current trends in the healthcare industry and consumer preferences point to the conclusion that home is the new healthcare hub.

This white paper discusses how to connect health at home to fit growing consumer demand for home-based healthcare solutions.

## > TREND #1: Today's healthcare consumer does not fit squarely in one category

Today's consumer is sometimes a patient, sometimes a family member, and sometimes an employee. Today's consumer often cares for the people around them like their children, their parents, or the neighbor down the street they have befriended.

Other times, consumers are on the receiving end of care from the people around them who love them. The role of today's consumer is constantly in flux and changes with their daily lives. What's more, while consumers may have shared experiences they can connect on, most consumers have vastly different life experiences and are at different milestones of their journeys.

Now factor in that today's healthcare consumers have seemingly unlimited choices: They have access to multiple health specialists, thousands of web pages with health information at their fingertips, and a slew of tech devices to access these. They are in the driver's seat for their choices, but they naturally have hindrances. Namely, these are time, access, and knowledge.

### Consumers expect a digital experience on par with other industries

Whenever consumers want a ride, groceries, or their favorite latte, they sign on a trusted app, and their desired product arrives in a couple of hours (or less). This experience translates across the retail, transportation, and food industries. As a result, consumers don't expect the healthcare industry to be different.

What is different in a post-COVID world is more health consumers indicate they are willing to share their health data in ways that include monitoring their health and tracking fitness progress.<sup>3</sup> In 2020, an estimated 42 percent of Americans used technologies to measure fitness and health improvement goals, while 28 percent used technologies to monitor health issues. These numbers have continuously trended upwards and are projected to do so beyond 2021.



## Companies must get consumers to and through their digital doorstep

Accessible, reliable, and high-quality digital health resources are the front doorstep to a consumer's experience with a healthcare organization. If a company offers a poor digital health experience, it doesn't matter if the care they provide is high-quality or unique because consumers won't enter the door in the first place.

The good news is that if a healthcare organization has a positive, efficient digital footprint, it has saved consumers time and knowledge. Consumers don't have to look anywhere else for a better or more convenient solution. Once they find it, the burdens of so much choice subside. Consumers know where to go for health information they can access in their own time (which often isn't office hours).

## Correcting the burdens of misinformation

Consumers are constantly bombarded with health information, which leads to a delicate balance between an uninformed self-diagnosis and an informed, empowered patient.

When consumers are exposed to inaccurate or misinformed information, it changes their behaviors. Misinformation can limit treatment options and keep a person from engaging in preventive treatments.<sup>4</sup> In one social media misinformation study, researchers tracked 126,000 rumors.<sup>12</sup> They found false information spread faster, showed up on more searches, and reached more people than true information.

Unfortunately, false information also tugs harder at one of the most common healthcare consumers: the elderly. A study published in the journal *Science Advances* found adults ages 65 and older were seven times more likely to share fake political news on Facebook than those ages 18 to 29.<sup>14</sup>

Misinformation can be difficult to correct. A concept called "motivated reasoning" illustrates this. Once a consumer adopts a belief, they are more likely to seek out information that aligns with that belief and reject information that goes against it.

Fortunately, there are some ways that companies can ensure their researched and true health information reaches patients. The first is by collaborating with trusted health professionals, including doctors and nurses. The second is by continually distributing researched, high-quality health information that keeps consumers coming back for more.

## The return of the house call and home care

In 1930, the "house call," where a physician went to a person's home to examine them, represented 40 percent of all patient-physician encounters.<sup>9</sup> Fast-forward to the 1980s when 0.6 percent of care was delivered by house call. What's important to remember is that home care did not become less valuable; technology at hospitals, physician's offices, and other sites advanced in such a way that consumers needed to come in person to receive imaging, lab work, or other diagnostic testing methods.

Today's consumers have the enhanced benefits of technology. From blood pressure, heart rate, fetal monitoring, blood glucose monitoring, or other at-home diagnostic testing capabilities, home care and (virtual) house calls are once again possible.



Enhanced access to equipment, supplies, and medical recommendations at home mean technology can return to where consumers are most comfortable: their homes. Taking advantage of innovative programs that streamline home-based care and help a person execute their provider's recommendations can increase patients' perceived value in their care.<sup>5</sup>

## > The Solution:

An estimated 73 percent of Americans said they would be very to somewhat comfortable downloading and sharing health information on applications pre-approved by hospitals or healthcare providers.<sup>10</sup>

What consumers need most from today's digital health solutions:

- Access to step-by-step guidance on any device – including their television.
- Continued provision of trustworthy content that leverages health experts whenever possible.
- Access activation campaigns through text, e-mails, and/or push notifications.
- To receive health information in short, understandable "tidbits" of about 30 to 60 seconds each.
- To interact with engaging videos and animated content that can utilize a health system's branding.

## > TREND #2: Caregiver Component

For a world that is so connected, there is a subset of people who have never felt more alone: Caregivers.

With an average age of

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America's caregivers commonly provide care for younger children and older adults.<sup>14</sup> They are young and digitally savvy, with 64 percent reporting using at least one digital tool to help manage their responsibilities.<sup>14</sup> However, they spend an average of 32 hours a week serving as a caregiver in addition to their full-time jobs.

Caregivers don't have a long time to identify needed information, but they do have the technology to do so if they have the right solutions. The need for streamlined care means they need an integrated technology platform that can act as a continuation of a healthcare provider's care.

### Caregivers need health information too

Caregivers are an untrained and unpaid workforce for their loved ones. They have the benefit of commitment and motivation to provide care. Still, they need medical solutions to quickly educate them on health topics, procedures, and specialties so they can feel confident in the care they provide. Quick, convenient access saves the caregiver time, which is an incredibly precious commodity to the caregiver.

Because caregivers are untrained, they often don't know what questions to ask about care provision. This presents an opportunity for healthcare organizations to take a proactive and preventive stance in the information they provide caregivers.

### Digital health solutions can narrow the health divide

Digital health solutions are projected to increase and expand such that health experts believe there will be a heavy shift toward digital tools for health by the year 2025. The Pew Research Trust calls this shift “tele-everything.”<sup>2</sup>

Unfortunately, the digital health revolution could deepen the lack of healthcare information and misinformation for those who are less-connected and tech-savvy.<sup>2</sup> Offering solutions on platforms all caregivers are likely to have – including televisions and mobile phones – can help to narrow this divide. Flexibility, such as having access to digital health tools around-the-clock at home, also enhances the quality of life for caregivers and their loved ones.

### What caregivers need most from today’s digital health solutions:

- Build a platform that incorporates caregivers in a loved one’s care journey and has personalized recommendations.
- An accessible, convenient, favorable platform on mediums a caregiver is likely to have – such as the television.
- Within that platform, offer the caregivers themselves their own journeys – ones that offer physical and mental health support to help caregivers cope with daily demands.

## > TREND #3: Provider Competition

Healthcare consumers are just that – consumers. If they don’t like a particular doctor, hospital, or even healthcare system, they will simply go to another. Switching providers isn’t a matter of great stress, it’s the matter of a search engine, and a phone call or appointment booked online.

As a result, healthcare organizations must engage their patients. Competing health systems are upgrading their patient engagement solutions to accomplish this goal. Providers who fail to recognize or act on enhanced patient engagement solutions will lose patients to a competitor, decreasing overall revenue.

### Providers must innovate interactions

Telehealth won’t go by the wayside in post-pandemic health markets. Instead, telehealth is expected to make up anywhere from

**30 to 40%** of patient interactions with a healthcare provider.<sup>11</sup>

Suppose a health system instituted a “just good enough” telehealth platform to be COVID-responsive. In that case, they will have to take a critical eye to ensure their online platforms are engaging and personalized – because they are here to stay.



The innovative interaction is also a convenient one.

## Satisfaction in care is not enough

An estimated **80% of patients** would consider switching from a provider they were happy with if they found another, more convenient provider.<sup>15</sup>

One way to increase convenience is to meet people where they are – in their homes.

### Personalization is key

Consider the consumer. Unless told otherwise, a cardiologist is a cardiologist. When they are faced with an option from two competing health systems consumers are more likely to choose the cardiologist that engages them with personalized and useful information. Embracing technology in this way helps providers go one step beyond to attract consumers.

An estimated **72% of patients** report that having a medical provider recommend health interventions in a tailored fashion is “very important.”<sup>7</sup> Of those respondents, **61%** reported they wanted to see their doctor utilize technology to help the patient monitor their progress.<sup>7</sup> The ability to monitor progress, in turn, can tell the patient if the intervention is working, which adds value to their care and motivates them to continue.

Consumers know when they can do better. Each day, they provide their review of an item just purchased, the restaurant meal they ate, or the doctor they visited. They know when a solution does not look good, isn’t easy to use, or just plain does not offer value.

### Key Considerations for Leading Healthcare Organizations:

- Offering an enterprise platform able to handle any service line.
- Ensuring that the platform is highly configurable to a health system’s needs and fit into a larger initiative, such as a digital front door.
- Ensuring that the platform complements existing tech infrastructures, such as EMRs, and can integrate seamlessly with your systems.
- A platform that has the technical scalability and innovation to accomplish digital healthcare transformation.



## > TREND #4: Proactive Payers

The common challenge for payers is to not only ensure consumers seek care but that they seek the right level. Crowded emergency departments filled with non-emergent patients can create a bottleneck for true emergencies.<sup>5</sup> Home-based care can reduce hospital bed utilization, keep patients and families together, and reduce the risks for in-hospital disease transmission.<sup>6</sup> Research studies suggest home-based care can be utilized for a variety of specialties beyond those for the elderly, including post-procedure rehabilitation and maternity care.<sup>3,13</sup>

At the earliest intervention level, care at home can be a positive step to prevent illness. Through preventive methods and education to recognize what provider to call when, hospitals and healthcare providers can focus on care for those who need it most and create loyalty among their patients so when they do need care, they know where to go.

### Payers must take a longitudinal look

An estimated  
**75%**

of the United States' healthcare expenditures are related to chronic disease.<sup>13</sup> However, **50%** of those who suffer from chronic disease do not adequately follow their doctor's treatment recommendations. This statistic suggests there is a longitudinal relationship management opportunity health systems currently are not capturing.

Healthcare does not happen just at a doctor's office or hospital room. A person (and often their caregiver) executes their care plan at home.

Preventive, proactive care saves nearly every facet of the healthcare system money. But if the "prescription" for proactive healthcare isn't personalized, consumers don't see themselves as able to make the changes. Consumers may have the will, but they need the way: A step-by-step outline of what a person can do to make healthy changes.

### Home is more important than ever

When a person's workday responsibilities end, they're ready to take a few moments for their health and wellbeing but that does not typically happen during their day job. The ability to connect to their health and treatment plan outside of office hours provides a competitive advantage for payers. However, the message must be delivered in a high-value platform that streamlines the consumer experience, so a person is not searching through multiple sites, apps, or sources to find an answer.

On a daily basis, consumers find healthcare interactions to be frustrating. More than 50 percent of consumers said they would rather deal with experiences such as waiting at the DMV or going to jury duty than deal with a health insurance issue in a recent poll.<sup>1</sup> Digital, at-home health interactions are one way to temper this frustration. An estimated 58 percent of consumers would prefer their health interactions are digital.

This connectivity also enhances the perceptions that a patient's providers are working for them. Offering a personalized platform of individualized treatment recommendations and treatment guidance helps to further the message that healthcare organizations want patients to take a preventive approach to health.

## Key Considerations for Leading Payor Organizations:

- Providing clear, simplified access to a coordinated, home-based preventive care focus.
- Reducing frustration by connecting consumers with the information they need in a digital environment.
- Leveraging a platform ensures consumers receive step-by-step plans that help them feel empowered and informed about what they can do for their health in the next hour, day, week, and longer-term.
- A proactive focus that keeps care at home can decrease costs and help patients seek care at the right locations and times.

## ➤ Moving Forward

A focus on health at home will have winners and losers. The winners will be those healthcare organizations who provide value through coordinated services that make the consumer feel the prescription is personalized. The losers will be those who do not offer a digital doorstep, do not connect their in-person health services to home, and who do not engage caregivers in the at-home management “prescription.”

Making home the healthcare hub has the power to cut healthcare costs, reduce unneeded utilization, and enhance overall patient and caregiver health. However, a convenient, useful, and personalized tool is necessary to reap the greatest benefits for consumers, caregivers, providers, and payers.

## Resources

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<sup>2</sup>Anderson, J., Rainie, L., and Vogels, E. A. (2021, February 18). Experts say the ‘new normal’ in 2021 will be far more tech-driven, presenting more big challenges. Pew Research Center. <https://www.pewresearch.org/internet/2021/02/18/experts-say-the-new-normal-in-2021-will-be-far-more-tech-driven-presenting-more-big-challenges/>

<sup>3</sup>Betts, D., Korenda, L., & Giuliani, S. (2020, August 13). Are consumers already living the future of health? Deloitte. <https://www2.deloitte.com/us/en/insights/industry/health-care/consumer-health-trends.html>

<sup>4</sup>Bode, L. & Vraga, E. K. (2017, June 16). See something, say something: correction of global health misinformation on social media. Health Communications. 33(9): 1131-1140. DOI: 10.1080/10410236.2017.1331312

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<sup>6</sup>Fessler, E. B., Soriano, T., Whitehouse, C., & Miller, R. (2020, December 6). Home-based medical care: high-value health care during coronavirus disease 2019 and beyond. Journal of the American Geriatrics Society. 69(2): 289-292. DOI: 10.1111/jgs.16967

<sup>7</sup>Going beyond intervention: impacting patient outcomes. (2020). Abbott Cardiovascular. <https://www.cardiovascular.abbott/us/en/campaigns/beyond-intervention.html>

<sup>8</sup>Guess, A., Nagler, J., & Tucker, J. (2019, January 9). Less than you think: prevalence and predictors of fake news dissemination on Facebook. Science Advances. 5(1). DOI: 10.1126/sciadv.aau4586

<sup>9</sup>Meyer, G. & Gibbons, R. (1997, December 18). House calls to the elderly—a vanishing practice among physicians. The New England Journal of Medicine. DOI: 10.1056/NEJM199712183372507

<sup>10</sup>Moscovitch, B. (2020, September 16). Americans want federal government to make sharing electronic health data easier. Pew Trusts. <https://www.pewtrusts.org/en/research-and-analysis/articles/2020/09/16/americans-want-federal-government-to-make-sharing-electronic-health-data-easier>

<sup>11</sup>Pennic, F. (2020, December 30). Predictions & trends to watch in 2021. HIT Consultant. <https://hitconsultant.net/2020/12/30/executives-healthcare-predictions-trends-2021/#.YKK-ctNKg0o>

<sup>12</sup>Swire-Thompson, B. & Lazer, D. (2020, April) Public health and online misinformation: challenges and recommendations. Annual Review of Public Health. 41: 433-451. DOI: 10.1146/annurev-publhealth-040119-094127

<sup>13</sup>VanHouten, H. (2020, June 23). Six ways healthcare will move into our homes. Phillips. <https://www.philips.com/a-w/about/news/archive/blogs/innovation-matters/2020/20200623-six-ways-healthcare-will-move-into-our-homes.html>

<sup>14</sup>Wired for care: the new face of caregiving in America. (2019). Cambia Health Solutions. <https://www.cambiahealth.com/sites/default/files/cambia-files/resources/Cambia%20Wired%20for%20Care%20Whitepaper.pdf>

<sup>15</sup>Wynne, B. (2018, October 11). What do you really know about patient loyalty? Becker's Hospital Review. [https://www.beckershospitalreview.com/patient-flow/what-do-you-really-know-about-patient-loyalty.html?oly\\_enc\\_id=6633](https://www.beckershospitalreview.com/patient-flow/what-do-you-really-know-about-patient-loyalty.html?oly_enc_id=6633)