Tracking American Sentiment: Managing Healthcare is Hard

New research reveals the gap between Americans' desire to be proactive about their health and the difficulties of putting that into practice.

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We Are Facing a Crisis in American Healthcare Today

6 in 10 adults have a chronic disease; 4 in 10 have two or more.

Only 8% of Americans undergo routine preventive screening.

Nearly 10 million people missed screenings for breast, colon and prostate cancer between March and May of 2020.

48% of Americans say their view of the U.S. healthcare system worsened due to the COVID-19 pandemic.

It is predicted that 170 million people will have a chronic disease by 2030. As Americans get sicker, we are still struggling to design a system whose goal is to get access to care and improve health outcomes. We make it difficult for everyday Americans to meet their healthcare goals; we make them navigate a complex maze of insurance, bureaucracy and silos with little-to-no chance of a streamlined experience that supports an individual's unique health needs.

This latest research reveals that Americans want to be healthy and find ways to improve their overall health and wellness. They have goals and think about the ways they can achieve them. But it also shows that the healthcare system often poses too many obstacles and challenges that get in the way of achieving those goals.
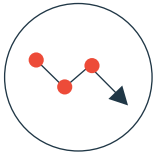
While we face an uphill battle, we also have more tools than ever to address this crisis. We have data and technology to make it easier – and even automated – for health systems to connect with patients in a way that not only engages, but activates, them. We have health systems, like Virtua Health and HonorHealth, that not only demonstrate it is possible to close the gap between idea and reality for patients in their communities, but provide a roadmap for doing so. We also have providers, like Griffin Hospital and Nuvance, that understand the need to proactively engage patients, and are experimenting with the best ways to connect with their community.

Ultimately, If we can close the gap between people who want to be proactive about their healthcare and those who are, we can drive better outcomes, lower costs and improve the overall experience with the system.

MICHAEL LINNERT
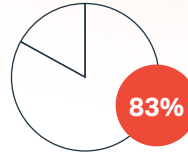Founder and CEO
Actium Health

actium

Americans' Pandemic Health

CONSUMERS FEEL LESS HEALTHY TODAY VS. PRE-COVID

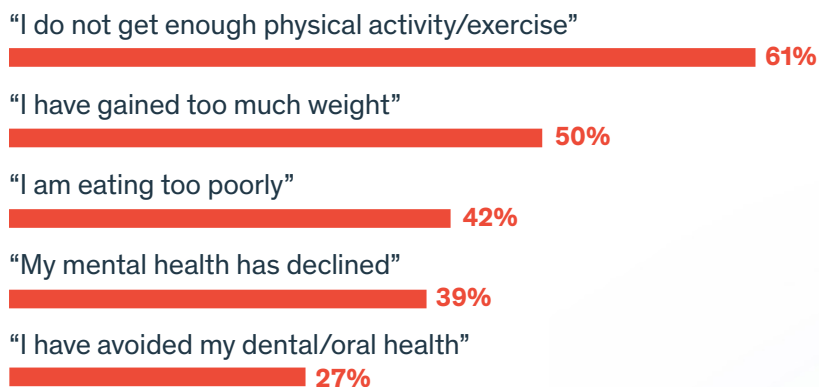**50%** of adults say their health worsened since 2019

83%

CONSUMERS ARE READY TO MAKE IMPROVEMENTS

83% of adults confirm they are likely/ extremely likely to take steps to improve their health this year

We have heard a lot about the increase in screen time over the past several years; one study found that, in 2020, the average person was streaming 8 hours of content per day. As part of that "forced" sedentary lifestyle, we've also read about (or personally experienced) the "COVID 15" — those extra pounds people put on during the pandemic. A WebMD poll found that **54%** of respondents said that they'd gained weight "due to COVID restrictions" disrupting their health routines.

So, it's no surprise that when we asked American adults to score their overall health today, half **(50%)** reported feeling *less* healthy than in 2019.

"I do not get enough physical activity/exercise"
61%

"I have gained too much weight"
50%

"I am eating too poorly"
42%

"My mental health has declined"
39%

"I have avoided my dental/oral health"
27%

More than 8 out of 10 **(83%)** said they are likely/extremely likely to take steps to improve their health this year.

37% "I want to be more proactive about my healthcare"

20% "I want to 'catch up' on preventive healthcare measures I have neglected"

9% "I want to find a team that can help me get my chronic condition under control"

While the habits we adopted over the past few years have become the punchline of jokes, the reality is much more dire. Missed preventive screenings and wellness appointments, poor personal health choices (e.g., increase in weight, decrease in activity) and an overworked healthcare system means we are on track for a significant decrease in health outcomes — across the U.S. population — if we don't act quickly.

The good news: our research shows American adults are willing and interested in making the necessary changes to improve their health. (Now it's up to the healthcare system to support them in encouraging and facilitating those actions.)

Preventive Care Can Save Lives, But Isn't Always Easy

Nearly all — **92%** — respondents believe preventive healthcare, such as screenings, is important to their overall health and wellness. In fact, the Centers for Disease Control and Prevention report that more than 100,000 lives could be saved each year if people took advantage of screenings, such as those designed to identify chronic diseases and colorectal cancer.

In our research, we found that **24%** of the people who have followed recommendations for preventive screenings were diagnosed with something following the appointment.

OUTCOMES FOLLOWING DIAGNOSIS

42%
began and finished treatment

27%
began and continue treatment

19%
received a chronic diagnosis

Despite the importance of preventive care and screenings, **35%** report being reactive about their health, only making an appointment when a health-related issue arises.

That reality is a hard pill for all of us in healthcare to swallow: people don't follow the recommended preventive care schedule because it's too costly, too much of a hassle and hard to remember. Imagine if we made healthcare as easy as making a dinner reservation or streaming a newly-released movie from your living room. A few clicks and your task is finished. When we shop online, algorithms identify our favorite products, styles and sizes. Imagine sitting on your couch and receiving a text message that you're due for a mammogram, and from that message, you can schedule the screening appointment.

TOP REASONS PATIENTS DON'T UTILIZE PREVENTIVE CARE

1. "I don't go to the doctor unless I have a problem"
2. "It's too costly"
3. "Making appointments is too much of a hassle"
4. "I simply forget to make them"

We have the data and technology in healthcare today to make that a reality, to make preventive care seamless for the patient. We just need to bring the right people and teams together to put the patient at the center of everything we do, both inside and outside the doctor's office.

![actium logo]

Healthcare Management is Hard and Requires a Provider-Patient Partnership

It's no surprise that Americans think managing healthcare is hard. After all, we make them get a referral to see a provider; we don't consistently provide technology to do things like make/change appointments and we expect them to navigate their own care journey.

It's also no surprise that when asked who they believe is responsible for keeping them on top of their healthcare, such as making and attending preventive appointments, **30%** responded that it's their doctor's responsibility. (1 out of 10 said their partner/spouse is responsible.) With the details of our diagnoses, care delivery and health history often off limits and dispersed — or, best case, difficult to acquire — it's no wonder a number of Americans believe their doctor should be in charge.

Of course, it's more complicated than that. But, there are take-aways health systems and providers can glean from our findings.

For example, six out of 10 **(61%)** report that they would like to hear more from their doctor in 2022. Not only that, but Americans report that they would have a better chance of improving their health if their doctor is engaged; on a scale from 1–10 (10 being the best chance), the average response was 6.5.

However, nearly one quarter **(24%)** do not believe their doctor understands them, their health risks and priorities.

PATIENTS STRUGGLE MANAGING THEIR HEALTH CARE

1 in 5 rate doing taxes as less painful than managing their healthcare

Also less painful than managing healthcare:

- **52%** house chores
- **26%** finances
- **20%** childcare

PATIENTS EXPLAIN CHALLENGES IN ENGAGING WITH PROVIDERS

44% don't see their doctor enough

38% don't feel their doctor listens to their concerns

35% don't get enough time with their doctor to discuss health concerns

30% don't have a doctor they see regularly

PATIENTS WANT TO HEAR MORE FROM THEIR DOCTOR

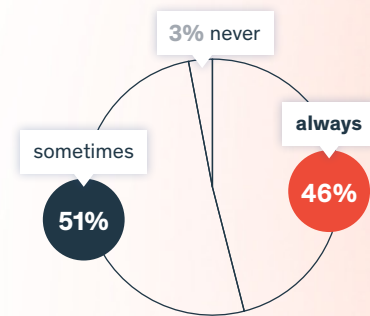**61%** would like to hear more from their doctor in 2022

Patients report that they would have a better chance of improving their health if their doctor is engaged

6.5

0   Best Chance: 10

While it's clear that patients would welcome more time, attention and engagement from their doctors, there's only so many hours in the day for doctors to spend on each patient; their time and attention are not scalable. But patient expectations have been shaped by immediate-gratification industries, like retail, that have built a foundation of delivering experiences on innovative technology. Now it's time for healthcare to do the same: to scale parts of the patient-provider relationship and design them in a way that prioritizes patient engagement and activation.

INFORMATION RELEVANCE IS FAIR, COULD BE BETTER

46% of patients say outreach from doctors is "always" relevant

3% never

sometimes

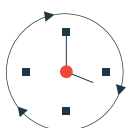always

51%

46%

actium

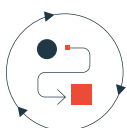# With the Right Tools, Marketers Can Fill These Gaps

Across the healthcare system, we have designed effective (and for many, satisfactory) experiences when a patient and provider are face-to-face. But for the rest of a patient's healthcare journey, their provider is mostly silent and disengaged. The results of our research indicate we can no longer keep going that way, where patients are only engaged when they have an acute health issue. Rather, we need to find ways to deliver a more seamless consumer experience that engages and activates patients so that they are more proactive about their healthcare.

While the efforts to truly engage patients require a cross-department collaboration, marketing is well-positioned to lead those efforts. After all, it's marketers that have been leading similar efforts across the different industries that have led to the change we're seeing in consumer expectations. They understand consumer personas, demands, expectations and how to close the gap between what they want and what is delivered. They also understand how to design, execute and measure outreach efforts in order to track what is working and what isn't.
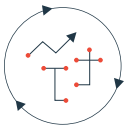
Based on our own work with some of the nation's leading healthcare marketers, here are some key insights for designing and building a patient engagement and activation strategy:

Think "always-on." Healthcare never sleeps, so neither should your engagement efforts. While there are days and months dedicated to certain health conditions, such as breast cancer awareness, the need doesn't just arise for patients in October. Healthcare consumers are on continuous care journeys that often require guidance and reminders through highly-personalized outreach to drive them to care. Effective healthcare marketers need to design "always-on" campaigns aimed at activating patients from annual wellness visits to preventive screenings to care gaps.

Throttle your outreach. You don't want to overwhelm your service lines with the success of your campaigns. Nor do you want to deliver a poor patient experience when your patients can't book their appointments in a reasonable timeframe. Sophisticated technology, like appointment availability sensing, can help dynamically facilitate and throttle communication outreach to the right patients at the right time.

Combine data + technology. Healthcare systems are swimming in rich and valuable data that can - and should - be used to improve patient communications that drive desired outcomes. With the right technology, your data silos can not only shed valuable insights and correlations, but also orchestrate the outreach to the appropriate patient at the right time.
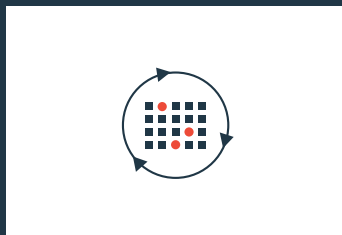
Attribute. If you don't track and measure your programs and campaigns, you can't show the impact that you've made to our organization objectives, whether it's patient volume driven or revenue. The right combination of data + technology + reporting will make measurement a key component of any healthcare marketer's success and impact on a health system's bottom line.
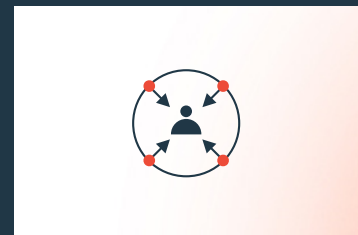
Across the country, healthcare marketers are putting these in practice. Check out these case studies for how they're doing it, and the results they've delivered.

Virtua Health identified and reached out to patients who were 15 times more likely to have breast cancer. They scheduled 11,310 mammograms; 1,395 lives were impacted via early breast cancer diagnosis and **9,793 life years were gained**.
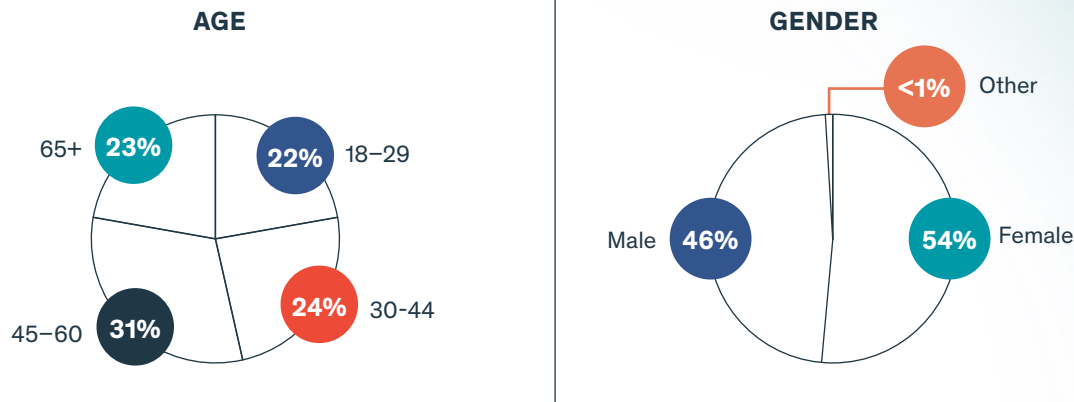
Annual wellness visit campaigns drove **2X+ in referral revenue**, closed critical care gaps and enabled patients to proactively manage their health.

HonorHealth facilitated **2,000+ vaccination appointments** in less than 2 weeks and drove 1,000 more inbound calls a day to the call center.

Survey Methodology

Actium conducted an online survey in February 2022 to better understand Americans' healthcare goals and the challenges of achieving them in today's landscape. The survey captured responses from a broad distribution of 1,230 consumers (18+) in the U.S.

AGE

65+ **23%**

18–29 **22%**

45–60 **31%**

30-44 **24%**

GENDER

<1% Other

Male **46%**

54% Female

About Actium Health

Actium Health is leading the way forward in proactive consumer engagement through health-system data intelligence, transforming the chaotic accumulation of EMR data into a clear and prioritized activation plan for every individual healthcare consumer. Actium's powerful combination of AI-driven next best actions for every individual, paired with hyper-personalized activation tools, is the key to realizing currently untapped value, better managing rising-risk patients, driving service-line growth, and fostering greater retention, loyalty, and lifetime value.

Get in touch with a patient activation expert today.
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