


Healthcare without Bounds: Disruptions in Digital Patient Engagement 2023	
TITLE:	Disruptions in Digital Patient Engagement 2023
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STUDY OVERVIEW:	<p>Digital Patient Engagement solutions are poised to transform 21st century healthcare delivery and help healthcare provider organizations (HCOs) achieve the Quadruple AIM framework of reducing costs, improving care quality & outcomes, and increasing provider/patient satisfaction.</p> <p>Digital engagement solutions enable patients to take an active role in their own care, communicate with healthcare providers, access health information, and manage their health and wellness. These solutions include mobile apps, Telehealth, remote patient monitoring, patient portals, and consumer/medical-grade wearables.</p> <p>COVID-19 was a tipping point that resulted in HCOs accelerating their investments in digital patient engagement solutions and associated infrastructure to keep patients connected, safe, and productive while remaining physically and socially separated. These investments helped</p> <ul style="list-style-type: none"> • Support the transition toward emerging hybrid patient care models • Reveal opportunities for clinical and technological innovation • Stress test digital infrastructure for large-scale deployments • Deliver equitable community-based care <p>While digital engagement solutions addressed short-term provider/patient needs during the height of the pandemic, many HCOs surveyed encountered significant change management and operational challenges when they attempted to deploy these solutions at-scale to support emerging hybrid care models. These challenges included:</p> <ul style="list-style-type: none"> • Lack of standardization • Limited patient adoption • Inadequate provider incentives, training, and support • Inadequate support for underserved/low-income patients • Underfunded digital health infrastructure investments

<p>STUDY METHODOLOGY</p>	<p>Disruptions in Digital Patient Engagement 2023 is an end-user market study focused on the current state of digital patient engagement solutions adoption by US-based healthcare provider organizations. The Spyglass report:</p> <ul style="list-style-type: none"> • Reveals important underlying market trends driving investments and usage of digital engagement solutions, • Identifies insights into the opportunities, challenges, and best practices to support large-scale enterprise-wide deployments, and • Suggests how healthcare providers can make the necessary investments in digital tools and infrastructure to prepare their organizations for 21st century healthcare delivery. <p>Methodology. The content for Disruptions in Digital Patient Engagement 2023 was derived from one hundred (100) in-depth interviews with clinical informatics and health IT thought leaders nationwide who are technically competent and knowledgeable about digital patient engagement technologies and emerging hybrid care models. Many were affiliated with leading health systems, academic medical centers, community hospitals, and ambulatory environments. The telephonic interviews were conducted over a six-month period between June and November 2022.</p> <p>Key learning topics covered during the interviews included:</p> <ul style="list-style-type: none"> • Patient adoption. Are patients ready to adopt digital engagement solutions to take a more active role in managing their health? • Digital engagement solutions. Which digital solutions were successfully deployed during COVID-19? • Digital health infrastructure. What new/incremental infrastructure investments did HCOs make to support hybrid care models during the pandemic? • Hybrid care models. Are providers embracing digital engagement solutions within their clinical workflows to support patient care? • Return on investment. Do digital engagement solutions provide a compelling ROI? • Clinical efficacy. Have digital engagement solutions been demonstrated to improve care quality and outcomes? • Health equity. Are HCOs enhancing digital engagement solutions to address health inequities? <p>Spyglass also evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed these solutions.</p>
<p>TARGET AUDIENCE</p>	<ul style="list-style-type: none"> • Software and hardware vendors, systems integrators and management consulting groups who are selling hardware, applications, and services into the healthcare industry • Healthcare administrators and IT executives who are making strategic decisions to fund clinical information technology solutions • Clinicians who are involved in informatics and clinical system evaluation and selection • Investment banking and private equity investors

**ABOUT SPYGLASS
CONSULTING
GROUP**

Spyglass Consulting, the market advisory firm helmed by renowned industry leader **Gregg Malkary**, is redefining the healthcare and life sciences landscapes through its focus on disruptive technologies, evolving business models, and untapped growth opportunities.

With an impressive career spanning over three decades, Malkary, Spyglass's **Founder and Managing Director**, stands at the forefront of digital and clinical transformation. His expertise in strategic planning, marketing, and business development has earned him national recognition as he empowers clients to innovate, cultivate sustainable competitive advantage, and make informed executive decisions.

Spyglass has built its reputation on providing leading-edge methodologies, tools, and services, assisting clients in:

- Navigating disruptive technologies,
- Transitioning to value-based care and population health management,
- Adapting to consumerism and digital health,
- Boosting operational performance through analytics, and
- Optimizing clinical workflows and EHR systems.

The firm's clientele reads like a who's who of industry heavyweights, including **Cisco, IBM, Microsoft, Intel, Accenture, Hewlett Packard, GE Healthcare, Philips Healthcare, Kaiser Permanente, and Johns Hopkins.**

Prior to founding Spyglass in 2002, Malkary's career saw him in leadership roles at Outlook Ventures, Exodus Communications, IBM, Hewlett Packard, Accenture, Silicon Graphics, SkyTel Communications, and Liberate Technologies. A frequent speaker at national conferences, Malkary's insights are highly sought after, with features and quotes in publications like Wall Street Journal, CIO, Business 2.0, MIT Technology Review, Network World, and eWeek.

A distinguished alumnus of Brown University, Malkary holds both an MS and BA in Computer Science and received the prestigious North American Philips Corporation Fellowship for his pioneering work in graphical simulation environments.

For more information about this study, please contact Gregg Malkary at gmalkary@spyglass-consulting.com.

Disruptions in Digital Patient Engagement

April 2023

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IN THIS STUDY	6
METHODODOLOGY	6
TARGET AUDIENCE	7
INTRODUCTION	8
DEMOGRAPHICS	9
ACKNOWLEDGEMENTS.....	14
MARKET STUDY RESULTS.....	16
INVESTMENT	16
Strategy. Have HCOs developed an enterprise-wide strategy for digital patient engagement?	16
Market Drivers. Which market factors are influencing HCO investments in digital engagement solutions?.....	19
SOLUTIONS	21
Telehealth Video Conferencing.....	21
Investment. Have HCOs invested or plan to invest in Telehealth video solutions?	21
Vendor. Which Telehealth video solutions have been deployed?	25
ROI. Does Telehealth provide a compelling return on investment?.....	29
Clinical Effectiveness. Is Telehealth clinically effective to support patient care?.....	31
Patient adoption. How has Telehealth adoption evolved pre-, during-, and post-COVID?	33
Remote Patient Monitoring (RPM)	36
Definition. What are RPM solutions?	36
Investment. Have HCOs invested or planned to invest in RPM solutions?.....	38
Market Drivers. Which market factors are influencing RPM investments?	41
Vendor. Which RPM solution(s) have been deployed?	42
ROI. Do RPM solutions provide a compelling return on investment?	44
Conditions. Which patient conditions/disease states are targeted for RPM usage?	47
Deployment Scope. How many RPM devices were deployed?	52
Clinical Effectiveness. Are RPM solutions clinically effective to support patient care?.....	53
EHR-Based Patient Portal.....	55
Investment. Have HCOs invested or planned to invest in EHR-based patient portals?.....	55
ROI. Do patient portals provide a compelling return on investment?	58
Vendor. Which patient portal solutions have been deployed?	59
Clinical Effectiveness. Are patient portals clinically effective to support patient care?	60
Patient Adoption. How has portal adoption evolved pre-, during-, and post-COVID?	61
WEARABLES.....	64

Investment. Have HCOs invested or planned to invest in consumer wearables? 64
 ROI. Do consumer wearables provide HCOs with a compelling ROI?..... 67
 Clinical Effectiveness. Are consumer wearables clinically effective to support patient care? 69
Medical Grade Wearables 71
 Investment. Have HCOs invested or planned to invest in medical-grade wearables? 71
 ROI. Do medical grade wearables investments provide a compelling ROI? 75
 Clinical Effectiveness. Are medical grade wearables clinically effective to support patient care? 77
POPULATION HEALTH 78
 Strategy. Have HCOs defined a population health vision, strategy, and plan?..... 78
 SDOH Adoption. Are patients with social determinants of health (SDOH) using digital tools to address their healthcare needs?..... 81
 Priority. Are digital tools targeted at SDOH patients an investment priority over the next 12 to 18 months? 84
HCO PARTNERSHIPS/COLLABORATION 86
 Retail Health. Are HCOs collaborating with retail health to support patient care? 86
 Payers. Are HCOs collaborating with payers to support hybrid care models? 89
STAFF ENGAGEMENT 92
 Hybrid care models. Are clinicians embracing hybrid care models and digital engagement tools?.. 92
DIGITAL INFRASTRUCTURE 96
 Cybersecurity 96
 Investment. Do existing security tools adequately protect patient data and corporate assets?.. 96
 Priority. Is cybersecurity an investment priority over the next 12 to 18 months? 97
 Analytics..... 100
 Investment. Have HCOs invested or planned to invest in analytics to support patient engagement?..... 100
 Customer Relationship Management (CRM) 104
 Investment. Have HCOs invested or planned to invest in CRM Solutions? 104
 Strategy. Have HCOs developed a multi- or omni-channel communications strategy? 105
 Cloud..... 110
 Investment. Are HCOs committed to migrating their technology infrastructure and applications to the cloud?..... 110
SPYGLASS OUTLOOK..... 113
ABOUT SPYGLASS CONSULTING GROUP 114
APPENDIX A: LIST OF FIGURES 115
ENDNOTES 117

APPENDIX A: LIST OF FIGURES

FIGURE 1: HEALTHCARE PROFESSIONALS SURVEYED DISTRIBUTED BY WORKER TYPE?9

FIGURE 2: HEALTHCARE PROFESSIONALS SURVEYED DISTRIBUTED BY SAMPLE JOB TITLES10

FIGURE 3: HEALTHCARE PROFESSIONALS SURVEYED DISTRIBUTED BY GEOGRAPHIC LOCATION.....11

FIGURE 4: HEALTHCARE PROFESSIONALS SURVEYED DISTRIBUTED BY HOSPITAL TYPE.....12

FIGURE 5: HOSPITALS SURVEYED THAT ARE PART OF A LARGER HEALTH SYSTEM12

FIGURE 6: HEALTHCARE PROFESSIONALS SURVEYED DISTRIBUTED BY HOSPITAL SIZE (# LICENSED BEDS).....13

FIGURE 7: HAVE HCOs DEVELOPED AN ENTERPRISE-WIDE STRATEGY FOR DIGITAL PATIENT ENGAGEMENT?18

FIGURE 8: HAVE HCOs INVESTED OR PLAN TO INVEST IN TELEHEALTH VIDEO SOLUTIONS?24

FIGURE 9: ARE TELEHEALTH VIDEO SOLUTIONS AN INVESTMENT PRIORITY OVER THE NEXT 12 TO 18 MONTHS?..24

FIGURE 10: WHICH TELEHEALTH VIDEO SOLUTIONS HAVE BEEN DEPLOYED?.....27

FIGURE 11: HOW MANY TELEHEALTH VIDEO SOLUTIONS HAVE BEEN DEPLOYED?27

FIGURE 12: ARE HCOs PLANNING TO CONSOLIDATE THEIR TELEHEALTH VIDEO SOLUTIONS OVER THE NEXT 12 TO 18 MONTHS?.....28

FIGURE 13: DO TELEHEALTH VIDEO SOLUTIONS PROVIDE A COMPELLING RETURN ON INVESTMENT?.....30

FIGURE 14: IS THERE ADEQUATE REIMBURSEMENT TO JUSTIFY NEW/INCREMENTAL TELEHEALTH VIDEO INVESTMENTS?.....30

FIGURE 15: IS TELEHEALTH VIDEO CLINICALLY EFFECTIVE TO SUPPORT PATIENT CARE?.....32

FIGURE 16: HOW HAS PATIENT TELEHEALTH VIDEO ADOPTION EVOLVED PRE-, DURING-, AND POST-COVID?35

FIGURE 17: HAVE HCOs INVESTED OR PLANNED TO INVEST IN RPM SOLUTIONS?.....40

FIGURE 18: IS RPM AN INVESTMENT PRIORITY OVER THE NEXT 12 TO 18 MONTHS?40

FIGURE 19: WHICH RPM SOLUTION(S) HAVE BEEN DEPLOYED?.....43

FIGURE 20: DO RPM SOLUTIONS PROVIDE A COMPELLING RETURN ON INVESTMENT?46

FIGURE 21: IS THERE ADEQUATE REIMBURSEMENT TO JUSTIFY NEW/INCREMENTAL RPM INVESTMENTS?46

FIGURE 22: WHICH PATIENT CONDITIONS/DISEASE STATES WERE TARGETED FOR RPM USAGE?51

FIGURE 23: HOW MANY RPM DEVICES WERE DEPLOYED?52

FIGURE 24: ARE RPM SOLUTIONS CLINICALLY EFFECTIVE TO SUPPORT CHRONICALLY ILL PATIENTS?.....54

FIGURE 25: HAVE HCOs INVESTED OR PLANNED TO INVEST IN EHR-BASED PATIENT PORTALS?57

FIGURE 26: ARE PATIENT PORTALS AN INVESTMENT PRIORITY OVER THE NEXT 12 TO 18 MONTHS?.....57

FIGURE 27: DO PATIENT PORTALS PROVIDE A COMPELLING RETURN ON INVESTMENT?58

FIGURE 28: WHICH EHR-BASED PATIENT PORTAL SOLUTIONS HAVE BEEN DEPLOYED?59

FIGURE 29: ARE EHR-BASED PORTALS CLINICALLY EFFECTIVE TO SUPPORT PATIENT CARE?60

FIGURE 30: HOW HAS PATIENT PORTAL ADOPTION EVOLVED PRE-, DURING-, AND POST-COVID?.....63

FIGURE 31: HAVE HCOs INVESTED OR PLANNED TO INVEST IN CONSUMER WEARABLES TO SUPPORT PATIENT CARE?.....66

FIGURE 32: ARE CONSUMER WEARABLES AN INVESTMENT PRIORITY OVER THE NEXT 12 TO 18 MONTHS?66

FIGURE 33: DO CONSUMER WEARABLES PROVIDE HCOs WITH A COMPELLING ROI?.....68

FIGURE 34: IS THERE ADEQUATE PAYER REIMBURSEMENT FOR CONSUMER WEARABLES AND MONITORING TO SUPPORT PATIENT CARE?.....68

FIGURE 35: ARE CONSUMER WEARABLES CLINICALLY EFFECTIVE TO SUPPORT PATIENT CARE?70

FIGURE 36: HAVE HCOs INVESTED OR PLANNED TO INVEST IN MEDICAL-GRADE WEARABLES TO SUPPORT PATIENT CARE?.....74

FIGURE 37: ARE MEDICAL GRADE WEARABLES AN INVESTMENT PRIORITY OVER THE NEXT 12 TO 18 MONTHS? ..74

FIGURE 38: DO MEDICAL WEARABLES INVESTMENTS PROVIDE HCOs WITH A COMPELLING ROI?..... 76

FIGURE 39: IS THERE ADEQUATE PAYER REIMBURSEMENT FOR MEDICAL WEARABLES AND MONITORING TO SUPPORT PATIENT CARE? 76

FIGURE 40: ARE MEDICAL GRADE WEARABLES CLINICALLY EFFECTIVE TO SUPPORT PATIENT CARE?..... 77

FIGURE 41: HAVE HCOs DEFINED A POPULATION HEALTH VISION, STRATEGY, AND PLAN? 80

FIGURE 42: ARE PATIENTS WITH SOCIAL DETERMINANTS OF HEALTH (SDOH) USING DIGITAL TOOLS TO ADDRESS THEIR HEALTHCARE NEEDS? 83

FIGURE 43: ARE DIGITAL ENGAGEMENT TOOLS TARGETED AT SDOH PATIENTS AN INVESTMENT PRIORITY OVER THE NEXT 12 TO 18 MONTHS? 85

FIGURE 44: ARE HCOs COLLABORATING WITH RETAIL HEALTH ORGANIZATIONS TO SUPPORT PATIENT CARE?..... 88

FIGURE 45: ARE HCOs COLLABORATING WITH CMS AND 3RD PARTY PAYERS TO SUPPORT DIGITAL ENGAGEMENT? 91

FIGURE 46: ARE CLINICIANS EMBRACING HYBRID CARE MODELS TO SUPPORT IN-PERSON VISITS AND VIRTUAL ENCOUNTERS? 95

FIGURE 47: ARE HCOs PROVIDING CLINICIANS WITH ADEQUATE TRAINING AND INCENTIVES TO SUPPORT HYBRID CARE MODELS?..... 95

FIGURE 48: DO DIGITAL ENGAGEMENT TOOLS AND COMMUNICATIONS CHANNELS ADEQUATELY PROTECT PATIENT DATA AND CORPORATE ASSETS? 96

FIGURE 49: IS CYBERSECURITY AN INVESTMENT PRIORITY OVER THE NEXT 12 TO 18 MONTHS?..... 99

FIGURE 50: HAVE HCOs INVESTED IN ANALYTICS TO SUPPORT PATIENT ENGAGEMENT, TELEHEALTH, AND POPULATION HEALTH? 103

FIGURE 51: HAVE HCOs INVESTED OR PLANNED TO INVEST IN CRM TO SUPPORT PATIENT ENGAGEMENT? 104

FIGURE 52: ARE HCOs COMMITTED TO MIGRATING THEIR TECHNOLOGY INFRASTRUCTURE AND APPLICATIONS TO THE CLOUD? 112