Generational Factors in Patient Engagement
March 2, 2016, 8:30-9:30 AM

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Conflicts of Interest

Patricia B Wise RN, MA, MS, FHIMSS
  • Has no real or apparent conflicts of interest to report

Christina L. Hoffman, MS
  • Is a salaried employee of WebMD

Jamie DeMaria, PhD, MBA
  • Is a salaried employee of WebMD
Agenda

• **Introduction:** Pat Wise

• **Generational Influences to Patient Perspectives on Patient Engagement:** Chris Hoffman

• **Clinician Perspectives on Patient Engagement:** Jamie DeMaria

• **Acknowledgments:** Jamie DeMaria

• **Lessons for HIT Professionals:** Pat Wise
Learning Objectives

• Describe the impact of the patient's generational representation to need around engagement

• Explain the impact of generational representation of the physician to their behaviors and beliefs around patient engagement

• Compare/Contrast the synchrony and asynchrony of generational representation of patients & physicians to the goal of patient engagement
This study provides deep insights to clinicians as well as CMO/CIOs into factors that can facilitate as well as those that serve as barriers to realizing deeper levels of patient and/or caregiver health engagement.
The Future of Meaningful Use...
Survey Perspective

• 2014 Survey presented at HIMSS15 looked at ~350 MDs (PCP), ~2500 patients or caregivers recently visiting a HCP on the topic of patient engagement and 125 CIOs/CMIOs.
  – Themes shared:
    o **Time** is greatest barrier to patient engagement
    o Need High Touch + High Tech for success: tools that facilitate patient engagement outside the clinical encounter need to be facilitated
    o Physicians believed they “own” patient engagement but so did CIOs

• 2015 Survey
  – 2600 patients or caregivers (“patient” is used in results but covers both) having visited a healthcare provider in last 3 months
  – 792 MDs (15% PCP, 85% Specialty) given “coordinated care” NQS
  – Added Generational Perspective for both patients/providers

• Comparisons between two surveys are made where meaningful & appropriate

• 2014 patient survey questions focused on what patients expected from their provider while the 2015 patient survey questions focused on the patients’ perceived role, desire, actions, confidence and capabilities to be engaged in their health
Grounding: Define Patient Engagement

For these surveys, Patient Engagement was defined as:

“Patient engagement results when patient/caregivers receive information and support that they need in order to fully participate in their care.”
CONTEXT: Generational Archetypes and Healthcare

- **Silent Generation** – born prior to 1942
- **Baby Boomers** – born between 1943-1960
- **Generation X** – born between 1961-1981
- **Millennials** – born 1982-2000
Projected Population By Generation

Note: Millennials refers to the population ages 18 to 34 as of 2015. 
Source: Pew Research Center tabulations of U.S. Census Bureau population projections released December 2014

PEW RESEARCH CENTER
CONTEXT: Generational Archetypes and Healthcare

- **Silent Generation**: Physician Directs Me
  - Prior to 1942

- **Baby Boomers**: Engage Me
  - 1943-1960

- **Generation X**: Educate Me
  - 1961-1981

- **Millennials**: Connect With Me
  - 1982-2000
Prior to 1942

LITERATURE SUMMARY
- Rely on personal doctors to provide medical care direction
- Prepared to seek information from and defer to their physician
- Frequent and longer visits due to clinical acuity and patient preferences around medical care
- Rigid definitions of good service—*the customer is always right!*
- Identify only physicians and nurses as health professionals
CONTEXT: Generational Archetypes and Healthcare

1943-1960

LITERATURE SUMMARY

- Values individual engagement in healthcare
- Seek counsel from and bring information to the physician, then research physician recommendations
- Identify only physicians and nurses as health professionals

- An interest in quality, as evidenced by their use of third-party comparisons or ratings as a means of self-directing to specialists and providers
- Many are involved in decision-making for their aging parents while simultaneously informing the health needs for their children
  - Can cause communication challenges for physicians as the patient may be expressing the values/concerns of a silent generation or millennial, while the primary healthcare decision maker is expressing Boomer values
CONTENTS: Generational Archetypes and Healthcare

1961-1981

LITERATURE SUMMARY
- An interest in being engaged and educated
- Relatively healthy
- Notably curious and actively seek information
- Assume physicians and staff are knowledgeable

- More likely to switch physicians and hospitals based on their most recent experience, rather than their overall past experience
- Have more in common with the Millennials than Boomers
- Identify physicians, nurses, NPs, PAs, insurance companies and pharmacies as medical professionals
CONTEXT: Generational Archetypes and Healthcare

1982-2000

LITERATURE SUMMARY

- Access the health system through PCPs, urgent care centers and OB/GYNs with higher likelihood to use OB/GYN as PCPs
- Low use of inpatient and outpatient services but when used, come through the ED or maternity
- Uses and appreciates technology
- Positive personal relationship with their physician
- Health information is valued and is sought from multiple sources
- More likely to switch physicians or hospitals if they lose confidence in the care provided based on their recent experience
In General, Generationally...

• Silent Gens are more likely to follow their doctors’ orders
• Boomers are more likely to debate with their doctor
• Gen Xers are more likely to get privately educated before they visit a physician
• Millennials will look for any connected health care (see word cloud)

A Word (Cloud) About Millennials...

Slide inspired by presentation at ACEhp by A. Bowser, R McCarry, A. Kuklinski 1/15/16
WebMD Patient Engagement Survey 2015
**Demographics**
Fielded on WebMD.com in July 25-August 10, 2015
no remuneration provided

<table>
<thead>
<tr>
<th>Demographic Factor</th>
<th>N (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population, US based only, seen by HCP for self or dependent within last 3 months</td>
<td>2600 (100%)</td>
</tr>
</tbody>
</table>

**Generational breakout**
- Gen Xers (1961-1980)
- Baby Boomers (1943-1960)
- Silent Gen (prior to 1943)

<table>
<thead>
<tr>
<th>Generational Group</th>
<th>N (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>M=80</td>
<td>(3%)</td>
</tr>
<tr>
<td>X=513</td>
<td>(20%)</td>
</tr>
<tr>
<td>BB=1495</td>
<td>(57%)</td>
</tr>
<tr>
<td>S= 512</td>
<td>(20%)</td>
</tr>
</tbody>
</table>

**Gender**
- Female
- Male

<table>
<thead>
<tr>
<th>Gender</th>
<th>N (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>F 1846</td>
<td>(71%)*</td>
</tr>
<tr>
<td>M 754</td>
<td>(29%)*</td>
</tr>
</tbody>
</table>

**Latin**

<table>
<thead>
<tr>
<th>Latin</th>
<th>N (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>104</td>
<td>(4%)*</td>
</tr>
</tbody>
</table>

**Race/Ethnicity**
- White
- Black
- Mixed Race
- Asian
- Other
- Prefer not to answer

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>N (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>W 2158</td>
<td>(83%)*</td>
</tr>
<tr>
<td>B 156</td>
<td>(6%)*</td>
</tr>
<tr>
<td>M 52</td>
<td>(2%)*</td>
</tr>
<tr>
<td>A 26</td>
<td>(1%)</td>
</tr>
<tr>
<td>O 78</td>
<td>(3%)</td>
</tr>
<tr>
<td>PNA 130</td>
<td>(5%)</td>
</tr>
</tbody>
</table>

*Statistically Significant Generational Differences detected at 90% power, statistics normalized for lower “n” in Millennials*
## Demographics
Fielded on WebMD.com in July 25-August 10, 2015
no remuneration provided

### Demographic Factor  N (%)

#### Household Income
- < $40K  615 (24%)*
- 40-80K  698 (27%)
- 80,001-120,000  436 (17%)
- >120K  312 (12%)
- Prefer not to answer  539 (21%)*

#### Highest Level of Education Completed
- 8th grade or less  4 (0%)
- Some HS but did NOT graduate  38 (1%)*
- HS or GED  320 (12%)*
- Some college or 2 yr degree  916 (35%)*
- 4 yr college grad  497 (19%)
- >4 year degree  825 (32%)*

#### Geographic Representation
- Each state in the US represented  17%  252 (10%)
- Mid-Atlantic & Great Lakes regions had greatest % (446 and 436 respectively)  202 (8%)
- CA  171 (7%)
- FL  171 (7%)

Caring for others  31%*

* Statistically Significant Generational Differences detected at 90% power
PATIENT SURVEY

Q4: “Where do you get information to help you manage your health?” (top 3 choices out of 9), randomized order offered—showing who ranked these sources as his/her primary or secondary source out of a possible ranking between 1 and 9.

<table>
<thead>
<tr>
<th>Where</th>
<th>Silent</th>
<th>Baby Boomers</th>
<th>Gen X</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verbal Instructions from doctor or HCP</td>
<td>84%</td>
<td>79%</td>
<td>88%</td>
<td>73%</td>
</tr>
<tr>
<td>Written Instructions from doctor or HCP</td>
<td>51%</td>
<td>51%</td>
<td>48%</td>
<td>46%</td>
</tr>
<tr>
<td>Internet (websites)</td>
<td>40%</td>
<td>45%</td>
<td>46%</td>
<td>46%</td>
</tr>
<tr>
<td>Portal</td>
<td>13%</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Implications:

• All generations rely primarily on a source of information that evaporates after the visit (doctor/HCP verbal instructions)
• Written instruction from Doctor/HCP ranked similar to internet for Mill/Gen X
• A large % of all generations use the internet as a source of information to help manage health
• Other sources of information listed did not accomplish double digit % weight when combining #1 and #2 ranking
**PATIENT SURVEY**

Q5: In the past 12 months, which of the following internet resources (websites) *has your doctor or HCP recommended* to you? (select all that apply) randomize offering

<table>
<thead>
<tr>
<th>Website</th>
<th>% Sorted by</th>
<th>Generational Difference?</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>66%</td>
<td>No</td>
</tr>
<tr>
<td>General consumer health information website such as WebMD</td>
<td>20%</td>
<td>Yes, BB statistically more likely to get this recommendation than Gen X</td>
</tr>
<tr>
<td>Website sponsored by your doctor or HCP professional association</td>
<td>12%</td>
<td>No</td>
</tr>
<tr>
<td>Website sponsored by your health insurance company (health plan)</td>
<td>11%</td>
<td>No</td>
</tr>
<tr>
<td>Website for disease focused group or advocacy organization such as American Cancer Society or Am Heart Association</td>
<td>8%</td>
<td>No</td>
</tr>
<tr>
<td>Government website</td>
<td>6%</td>
<td>No</td>
</tr>
<tr>
<td>Website from drug company</td>
<td>4%</td>
<td>No</td>
</tr>
<tr>
<td>Website, chat room, message boards or other online community for patients or caregivers with the same health condition</td>
<td>3%</td>
<td>No</td>
</tr>
</tbody>
</table>

**Implications:**

- HCPs could facilitate post visit/between visit pull through/support by recommending or “prescribing” on-line resources
In a separate survey conducted in May of 2015 of 607 physicians
Q: “Have you ever referred your patients/caregivers to WebMD?”

Source: Medscape Internal Data, 2015; N=342
SHARED DECISION MAKING Q7: “Please use a scale from 1 to 5 where 1 equals ‘I follow the treatment plan as provided by the doctor or HCP, no questions asked’ and 5 equals ‘I am very involved in the development of the plan of care.’”

- Mean 3.77 across cohort
- Boomers in GREY (3.82) statistically more involved in treatment plan development than Silent Gens DARK BLUE (3.65), (significant difference at the 90% level)
SUPPORTING LINK

• The following hot link provides detail for the Q8--19 affirmative engagement statements that we asked patient/caregiver to react to:


After this presentation a summary of the results will also be available here.
**Q8: of the 19 affirmative engagement statements, the following were:**

Of the 19 affirmative engagement statements asked, the following six were determined to be statistically significant at a 90% level

(Scale from 1 to 5 where 1 equals “Strongly Disagree” and 5 equals “Strongly Agree.”)

- I am responsible for managing my own/my dependent’s health: 4.50
- I feel comfortable asking my/my dependent's doctor or HCP questions: 4.49
- I/my dependent take medicine(s) as recommended by my doctor, HCP, or pharmacist: 4.48
- I take an active role in my/my dependent's own health care: 4.48
- I know what my/my dependent’s medicines are supposed to do: 4.44
- I know when I need to call my/my dependent’s doctor or HCP: 4.43

**Implications:**

- Patients across the generational divisions affirm they are responsible their own health
- With equal strength to ownership, they are comfortable asking questions of HCP
Q8: “Please rate your level of agreement with the following statements”

(1=strongly disagree, 5= strongly agree)

- 19 statements, no drop off
- Affirmative Engagement Statements (e.g. “I can help myself get better by the actions I take and the things I do”)
- 3/19 statements came in below mean of 4 (4=agree)
  - I can stick with plans to exercise and eat healthy foods (3.72)
  - I have brought info I found on my disease/condition to show the doctor/HCP (3.55)
  - I use tools like checklists, apps, diaries or fitness trackers (e.g. Fitbit, smart watch, pedometer) to help better manage the condition or disease (3.29); Little use regardless of age
- Generational difference theme
  - Millennials (often statistically so) agree LESS than others generations
  - Silent Gens (often statistically so) agree MORE than other generations
  - Gradients tend to escalate from Millennials to Silent Gens

N=2600
Q8, R19: Please rate your level of agreement with the following statements: I/my dependent use tools like checklists, apps, diaries, or fitness trackers (eg, Fitbit®, smart watch, pedometer) to help better manage the condition or disease (1= strongly disagree, 5= strongly agree)

**Implications:**
- Millennials are statistically less likely to use tech tools than other generations (statistics normalized)
**PATIENT SURVEY**

Q9: “If you DO NOT use wearable devices (examples provided), why not?” (select 1)  

<table>
<thead>
<tr>
<th>Reason</th>
<th>% (sorted by)</th>
<th>Generational Differences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>19</td>
<td>Millennials (35%) statistically more likely to cite but each gen statistically different from the next where Silent lands at 12%</td>
</tr>
<tr>
<td>I currently use a wearable</td>
<td>18</td>
<td>No</td>
</tr>
<tr>
<td>Doctor has not recommended it</td>
<td>18</td>
<td>Silent Gen (27%) statistically more likely to cite compared to Millennials (8%)</td>
</tr>
<tr>
<td>Other</td>
<td>14</td>
<td>No</td>
</tr>
<tr>
<td>Not effective in changing my behavior</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Too much trouble</td>
<td>8</td>
<td>No</td>
</tr>
<tr>
<td>Info not helpful</td>
<td>5</td>
<td>Silent Gen (8%) statistically more likely to cite vs other generations</td>
</tr>
<tr>
<td>Not easy to use</td>
<td>3</td>
<td>No</td>
</tr>
<tr>
<td>Too much info (TMI)</td>
<td>2</td>
<td>No</td>
</tr>
<tr>
<td>Unsure about privacy issues</td>
<td>2</td>
<td>No</td>
</tr>
<tr>
<td>Data is not going directly into my EHR</td>
<td>0</td>
<td>No</td>
</tr>
</tbody>
</table>

**Implications:**

- Millennials may benefit from the incentive of “free” devices to use trackers
- Older patients, esp. Silent Gens may increase use with doctor recommendation, thereby increase technology helper use
Q11, R1: “How likely are you to take the following action: Bring information or education that you found on the Internet to your doctor or HCP?”

N=2600

Implications:
• Millennials are statistically less likely to bring in information they find on the internet to their HCP than older generations.
Q14a: Has your doctor or HCP recommended that you register on a patient portal? Q14b Have you?

N=2600

<table>
<thead>
<tr>
<th>Generation</th>
<th>Yes-Dr. Recommend Portal</th>
<th>Yes-Registered Portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Silent Gen</td>
<td>47%</td>
<td>46%</td>
</tr>
<tr>
<td>Baby B</td>
<td>57%</td>
<td>59%</td>
</tr>
<tr>
<td>Gen X</td>
<td>58%</td>
<td>57%</td>
</tr>
<tr>
<td>Millennial</td>
<td>44%</td>
<td>45%</td>
</tr>
</tbody>
</table>

**Implications:**
- Portal Registration occurs if Doctors/HCPs (vs. leaving it for administrative staff) recommend that it happen
- Meaningful Use incentives being left on the table
- Engagement tools being untapped in Millennials and Silent Generation.
Q14d How do you use the patient portal? (Select all that apply)

<table>
<thead>
<tr>
<th>Selection</th>
<th>% (sort)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check lab or test result</td>
<td>77%</td>
</tr>
<tr>
<td>Communicate with HCP by email*</td>
<td>42%</td>
</tr>
<tr>
<td>Request Rx Refills</td>
<td>40%</td>
</tr>
<tr>
<td>Update Contact info*</td>
<td>40%</td>
</tr>
<tr>
<td>Schedule or cancel appts with HCP*</td>
<td>37%</td>
</tr>
<tr>
<td>Check on benefits and coverage**</td>
<td>17%</td>
</tr>
</tbody>
</table>

* Silent Gen Statistically LESS likely than others (ORANGE FILL)
** Millennials statistically MORE likely than others (LIGHT BLUE FILL)

**Implications:**
- Silent Gen less likely to use full capacity of patient portal vs. other generations.
- Price sensitivity of Millennials shows up in benefit checks/coverage
Patient Survey

NO GENERATIONAL DIFFERENCES

People of all ages feel responsible for their health and take action accordingly (Q8 R2,3,4)

Shared decision-making is valued by all (Q8 R12)

GENERATIONAL DIFFERENCES

Silent generation and Boomers more likely to follow providers recommendations regarding medication (Q8 R8)

Silent Generation and Millennials, less likely to know when to call their doctor then people Boomers and Gen Xers (Q8 R15)

Boomers more likely to follow the prescribed treatment plan, no questions asked, then Silent Generation, Gen Xers and Millennials (Q7)

Silent Generation more likely to make necessary lifestyle changes and stick to plans to exercise and eat healthy foods then Boomers, Gen Xers and Millennials. (Q8 R 9,10)

Silent Generation and Boomers more likely than Millennials to bring information their found about their condition to show their doctor. (Q8 R17)

Millennials are less comfortable talking to their doctor, asking questions or bringing up concerns then Gen Xers, Boomers and Silent Generation (q8 R 13, 14, 18)
Silent Generation: Physician Directs Me
Born up to 1942

Literature Summary

• Rely on personal doctors to provide medical care direction
• Prepared to seek information from and defer to their physician
• Frequent and longer visits due to clinical acuity and patient preferences around medical care
• Rigid definitions of good service—*the customer is always right!*
• Identify only physicians and nurses as health professionals

Study Themes

• **Doctors rule**…opportunity to harness this for greater retention with written or internet information
• **Most confident generation** shared decision making/PE behaviors
• While digital immigrants, approx. 15% will sport wearables (like other generations)
• Will register for portals if doctor recommends, use however beyond Lab data limited

WebMD Patient Engagement Survey, 2015
Boomers: Engage Me
Born 1943 to 1960

Literature Summary

• Values individual engagement in healthcare
• Seek counsel from and bring information to the physician, then research physician recommendations
• Identify only physicians and nurses as health professionals
• An interest in quality, as evidenced by their use of third-party comparisons or ratings as a means of self-directing to specialists and providers
• Many are involved in decision-making for their aging parents while simultaneously informing the health needs for their children
  – Can cause communication challenges for physicians as the patient may be expressing the values/concerns of a silent generation or millennial, while the primary healthcare decision maker is expressing Boomer values

Study Themes

• Doctors verbal instructions most used, followed by doc written and internet
• Doctors can help by recommending reliable resources
• Moderately confident in shared decision making/engagement actions
• Wearables used by nearly 20%
• Doctors do recommend portals
• Portal Use: labs (77%), communication with HCP (44%), refill (42%), schedule (38%)

WebMD Patient Engagement Survey, 2015
Generation X: Educate Me
Born 1961-1981

Literature Summary
- An interest in being engaged and educated
- Relatively healthy
- Notably curious and actively seek information
- Assume physicians and staff are knowledgeable
- More likely to switch physicians and hospitals based on their most recent experience, rather than their overall past experience
- Have more in common with the Millennials than Boomers
- Identify physicians, nurses, NPs, PAs, insurance companies and pharmacies as medical professionals

Study Themes
- Doctor verbal instructions most, doc written and internet equal
- Doctors can help by recommending reliable resources
- Mildly confident (least) in shared decision making/engagement actions
- Wearables used by nearly 20%
- Doctors do recommend portals
- Portal use: labs (77%), communication with HCP & schedule (41%), refill (37%)

WebMD Patient Engagement Survey, 2015
Millennials: *Connect With Me*
Adults born between 1982-2000

**Literature Summary**
- Access the health system through PCPs, urgent care centers and OB/GYNs with higher likelihood to use OB/GYN as PCPs
- Low use of inpatient and outpatient services but when used, come through the ED or maternity
- Uses and appreciates technology
- Positive personal relationship with their physician
- Health information is valued and is sought from multiple sources
- More likely to switch physicians or hospitals if they lose confidence in the care provided based on their recent experience

**Study Themes**
- Doctor verbal instructions most, doc written and internet equal
  - But, less comfortable asking questions and discussing concerns
- Doctors can help by recommending reliable resources
- Minimally confident in shared decision making/engagement actions
- Wearables used by nearly 20%
- Doctors recommend portal less often
- Portal use mostly to check labs (75%), followed by scheduling (39%), refill (36%), schedule, communication (33%)

WebMD Patient Engagement Survey, 2015
Patients from the all generational cohorts report nearly equally their likelihood to bring information or education that they found on the Internet to their doctor or HCP

True/False
False (Q11/R1 ~Millennials LEAST likely)
What % of patients report that their doctor has recommended they register on a patient portal?

A/95%
B/75%
C/55%
D/35%

Correct: 55% (but Gen X and Boomer statistically more likely than Millennials and Silent Gen)-Q14a
Provider Survey
### Demographics

Fielded on Medscape.com August 2015, no remuneration provided

<table>
<thead>
<tr>
<th>Demographic Factor</th>
<th>N (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Survey Population</strong></td>
<td>N=792</td>
</tr>
<tr>
<td>Specialty</td>
<td></td>
</tr>
<tr>
<td>PCP</td>
<td>99 (12.9%)</td>
</tr>
<tr>
<td>Specialist</td>
<td>666 (87.1%)</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>485 (63.7%)</td>
</tr>
<tr>
<td>Female</td>
<td>276 (36.3%)</td>
</tr>
<tr>
<td>Years in Practice</td>
<td></td>
</tr>
<tr>
<td>0-10</td>
<td>121 (15.5%)</td>
</tr>
<tr>
<td>11-15</td>
<td>68 (8.7%)</td>
</tr>
<tr>
<td>16-20</td>
<td>86 (11%)</td>
</tr>
<tr>
<td>21-30</td>
<td>217 (27.7%)</td>
</tr>
<tr>
<td>&gt;30</td>
<td>290 (29%)</td>
</tr>
<tr>
<td>Practice Setting</td>
<td></td>
</tr>
<tr>
<td>Office Based</td>
<td>390 (39.4%)</td>
</tr>
<tr>
<td>Hospital</td>
<td>240 (30.6%)</td>
</tr>
<tr>
<td>Fed Facility</td>
<td>61 (7.8%)</td>
</tr>
<tr>
<td>Other</td>
<td>274 (22.2%)</td>
</tr>
<tr>
<td>VBP Arrangement</td>
<td></td>
</tr>
<tr>
<td>(n=312)</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>117 (37.5%)</td>
</tr>
<tr>
<td>No</td>
<td>195 (62.5%)</td>
</tr>
</tbody>
</table>
Q2: When were you born?

- Silent Gen: Before 1943: 14.8%
- Boomers: 1943-1960: 47.1%
- Gen X: 1961-1980: 28.7%
- Millennials: 1981-1997: 4.9%
- I Prefer Not to Answer: 4.5%

N=792
Q12: In your opinion, Which group is primarily responsible for patient engagement?

HCP: 70.8%
Patient: 23.2%
Plan: 8.4%

Implications
- HCPs believe they are primarily responsible for patient engagement
Q13-18 “For me, patient engagement is (only one # allowed per statement)”

**Implications:**

- This largely specialty cohort believe PE is beneficial, effective, part of their job but also time consuming.
- Boomer doctors were 70% less likely to deem patient engagement as easy as compared to Silent Gen doctors (p value < 0.05), Gen X doctors are 80% less likely to deem patient engagement as easy as compared to Boomers and Silent Gen (p value < 0.01)

— YOUNGER DOCS FIND PE MORE DIFFICULT —
Q23: By generation, to what extent are you able to determine if your patients are engaged in their health care?

Implications:
- Physicians are fairly confident in their ability to assess their patients’ engagement
### Q19: How often do you use the following strategies to engage with patients in your practice? (1=strongly disagree, 5= strongly agree)

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discuss the risks and benefits of treatment options with my patients/families/caregivers</td>
<td>4.51</td>
</tr>
<tr>
<td>Provide treatment options to my patients</td>
<td>4.38</td>
</tr>
<tr>
<td>Assess/consider my patient’s health literacy and technology capabilities and adapt my communication/recommendations accordingly</td>
<td>4.19</td>
</tr>
<tr>
<td>Include my patient’s values, beliefs, and preferences when recommending a treatment plan</td>
<td>4.17</td>
</tr>
<tr>
<td>Take the time necessary to understand my patient’s needs, challenges, support system, and living situation when making treatment recommendations</td>
<td>4.16</td>
</tr>
<tr>
<td>Gather input from my patients or their families/caregivers to develop the treatment plan</td>
<td>4.13</td>
</tr>
<tr>
<td>Take the time necessary to understand what my patients know about their health needs, disease, or condition before directing them to resources to…</td>
<td>4.12</td>
</tr>
<tr>
<td>Coordinate my patient’s care with their other healthcare providers (HCPs) inside or outside my practice</td>
<td>3.85</td>
</tr>
<tr>
<td>Rely on other staff in my practice to engage and involve patients in their care</td>
<td>3.21</td>
</tr>
<tr>
<td>Recommend to my patients that they research/get more information about their condition from the Internet</td>
<td>2.84</td>
</tr>
<tr>
<td>Explain to my patients how to use the Internet or other technology for healthcare information and management</td>
<td>2.67</td>
</tr>
</tbody>
</table>

No statistical difference between age groups
Q16: Do you provide patients with access to their clinical data via electronic patient portal?

**Implications:**
- In comparison to the 2014 Physician Survey (with PCPs only), 2015 shows that specialists are less likely to offer patient portals. Given lack of time, with increased VBP pressures, health coach employment may be an effective strategy.
**PHYSICIAN SURVEY**

Q24: Select your top 5. What indicators/metrics do you use to determine how engaged patients/families/caregivers are in their own health?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pattern of nonadherence with the treatment or wellness plan (smoking, have not lost weight, continued inactivity, failure to obtain health screening or vaccinations, failure to schedule follow-up visit, failure to follow recommendations, etc.)</td>
<td>70.1%</td>
</tr>
<tr>
<td>Behavioral clues that a patient is not likely to follow the treatment plan discussed during an office visit. (i.e., not making eye contact, not paying attention, not taking recommendations seriously, etc.)</td>
<td>68.4%</td>
</tr>
<tr>
<td>Pattern of nonadherence to medication regimen</td>
<td>63.6%</td>
</tr>
<tr>
<td>Answers to open-ended (teach-back) questions asked to assess my patient’s understanding of his or her condition and treatment plan</td>
<td>62.6%</td>
</tr>
<tr>
<td>Information from family members/caregivers about the health status of patient</td>
<td>50.8%</td>
</tr>
</tbody>
</table>

No statistical difference between age groups
Q25: Select your top 5. From your experience with patients in your practice, patients who are engaged are most likely to do the following:

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take medications as prescribed</td>
<td>69.0%</td>
</tr>
<tr>
<td>Be honest about what they are actually doing—health behaviors, medication adherence, drugs/supplements they are taking, and others they are seeing to manage their health</td>
<td>62.6%</td>
</tr>
<tr>
<td>Come to me with a list of questions to ask</td>
<td>54.0%</td>
</tr>
<tr>
<td>Go online/use internet resources to better understand their symptoms and/or medical conditions</td>
<td>51.3%</td>
</tr>
<tr>
<td>Follow my medical advice</td>
<td>51.9%</td>
</tr>
<tr>
<td>Reduce or eliminate unhealthy habits</td>
<td>48.7%</td>
</tr>
<tr>
<td>Keep a list of all current medications, both prescription and nonprescription, and brings the list to review during the office visit</td>
<td>40.6%</td>
</tr>
</tbody>
</table>
Q22: From your experience, how involved (engaged) do patients, of different age groups, want to be when it comes to making decisions about their health and treatment plan?

Implications:
• Physicians believe that Gen X and Boomers are more engaged in their care than Millennials and Silent Gen, respectively. In comparison to the patient survey, that assessment is accurate for Millennials but is not for members of the Silent Generation.

N=278
Q11: Do you employ a health coach, patient navigator, patient educator, or coordinator to facilitate patient education/care coordination needs?

Implications:
- Despite a difference in specialty between 2014 and 2015 cohorts, consistent employment of a patient engagement “helper”
- Younger doctors who offer health coaches are statistically less likely to view patient engagement as easy (generational interaction assessed Q13: Q11)
Q26: Do you recommend the use of wearable devices such as Fitbit or a smart watch to your patients?

N=195

Yes: 31.3%
No: 68.7%
Q27: (only for those who answered yes in 26) What do you see as the primary benefit to using wearable devices as part of patient health management and patient engagement?

N=58

- Wearable devices motivate patients to follow a health/treatment plan: 67.2%
- Patient-generated health data to supplement clinical data: 20.7%
- Identify information that patients don't report: 5.2%
- Help with management of chronic disease: 5.2%
- Other (please specify): 1.7%
Q31: (if yes to app)...What do you see as the primary benefit to using health apps?

- Helps patient stay engaged in his or her health and disease management: 48.5%
- Apps motivate patients to follow a health/treatment plan: 27.3%
- Patient-generated health data to supplement clinical data: 12.1%
- Identifies information that patients don’t report: 6.1%
- Helps with management of chronic disease: 4.5%
- Other (please specify): 1.5%

N=66
Which generational cohort was least likely to find patient education “easy” to discuss with their patients?

A-Millennials
B-Gen X
C-Baby Boomers
D-Silent Gen

Correct: Gen X
Physician Survey

Implications of “Tech Tools” like Apps and Wearables

IMPLICATIONS

• Younger doctors who recommend health apps and wearables are more likely to view patient engagement as essential (based on analysis of Question 14, 26 and 30)

• Doctors who were born between 1943 and 1960 are nearly twice as likely as doctors born before 1943 (p value < 0.05) to recommend apps to their patients, 3x more likely to recommend wearables (p value < 0.05)

• Given that older patients state big reason for not using wearables/apps is their doctor has not recommended it, opportunity to use “help” from outside of the clinical interaction
Acknowledgements

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• Susan R. Grady, MSN, RN-BC, APN
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  Medscape Education

• Nimish Mehta, MBA, PhD
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• Mazi Rasulnia, MBA, PhD
  Co-Founder/President
  PACK Health

Subject Matter Expertise: Analytics

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  WebMD

• Richard C. O’Hara, MBA, CFA
  (provider data)
  Senior Data Scientist
  Medscape Education
Patient and Provider Survey: Lessons for HIT Professionals

- Clinician recommendations/“prescriptions” are critical, especially with older patients, exploit “Tech Tools” beyond/between visit technology:
  - Patient Portal (older patients less likely to use full functions)
  - On-line resources they trust
  - Apps
  - Wearables
- Print and deliver visit summary with recommended actions (and resources).
- Don’t assume older patients are not digitally savvy
- Younger patients need more help with engagement than older patients
- Millennials particularly are not likely to engage until they need to do so (become sick), will need to be prepared to do so digitally once they are
- Doctors view patient engagement as essential…younger doctors find it more challenging than older ones
Presentation Summary Link

After this presentation a summary of the results will also be available here:

Questions?

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