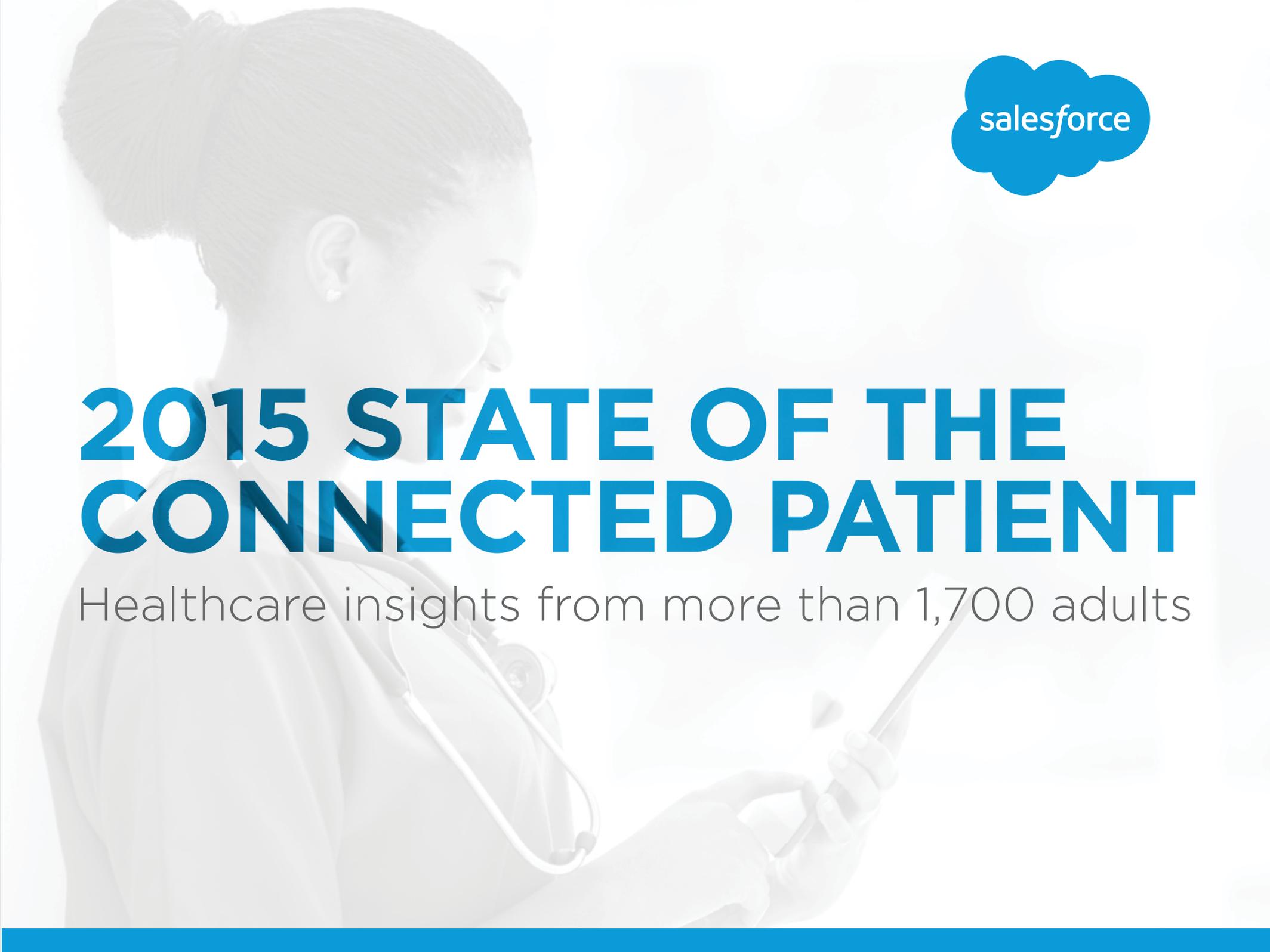




salesforce



2015 STATE OF THE CONNECTED PATIENT

Healthcare insights from more than 1,700 adults



2015 STATE OF THE CONNECTED PATIENT

To explore current attitudes and methods in how Americans today communicate and manage their health with providers, Salesforce conducted its “2015 State of the Connected Patient” report. Based on responses from 1,700 adults with health insurance and a primary care physician, the report found that Americans primarily use antiquated methods to communicate with their doctors and manage their health. For example, less than 10% of those surveyed use the web, email or text to set up appointments. And only 21% use the web to look at their health data. This lack of modern technology could at least partly be responsible for challenges around preventative care in America, as 40% of respondents said they receive no ongoing care recommendations from their physician.

The report also found 86% of patients currently have health insurance and are generally satisfied with their care, but healthcare providers will likely face pressure in the near future from the next generation of patients--millennials--who expressed strong interest in using new technologies to collaborate with their primary care physician. For example, 60% of millennials support the use of telehealth options to eliminate in-person health visits and 71% would like to have their provider use an app to book appointments, share health data and manage preventive care.

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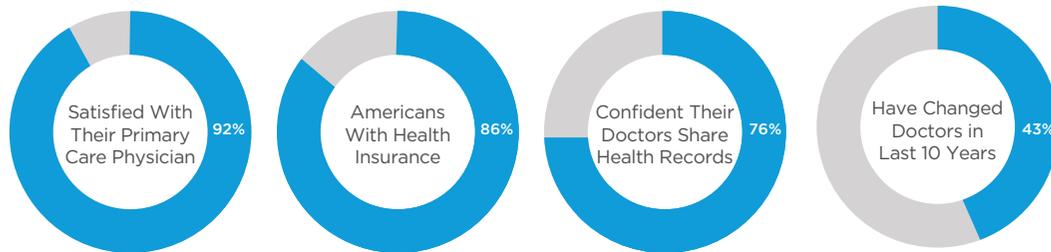
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The State of Patient Care in the United States

Overall, healthcare patients in the United States are generally satisfied with the level of care they are receiving from their Primary Care Physician. Eighty-six percent of surveyed Americans currently have health insurance. Seventy-six percent are confident that their doctors are sharing health records between them for a holistic view of their health.

The average American with health insurance sees their doctor three times a year and has an average of 2.5 doctors overseeing some part of their healthcare. Overall, Americans are most satisfied with making appointments and managing bills with their Primary Care Physician and least satisfied with learning about preventative care from their insurance provider.

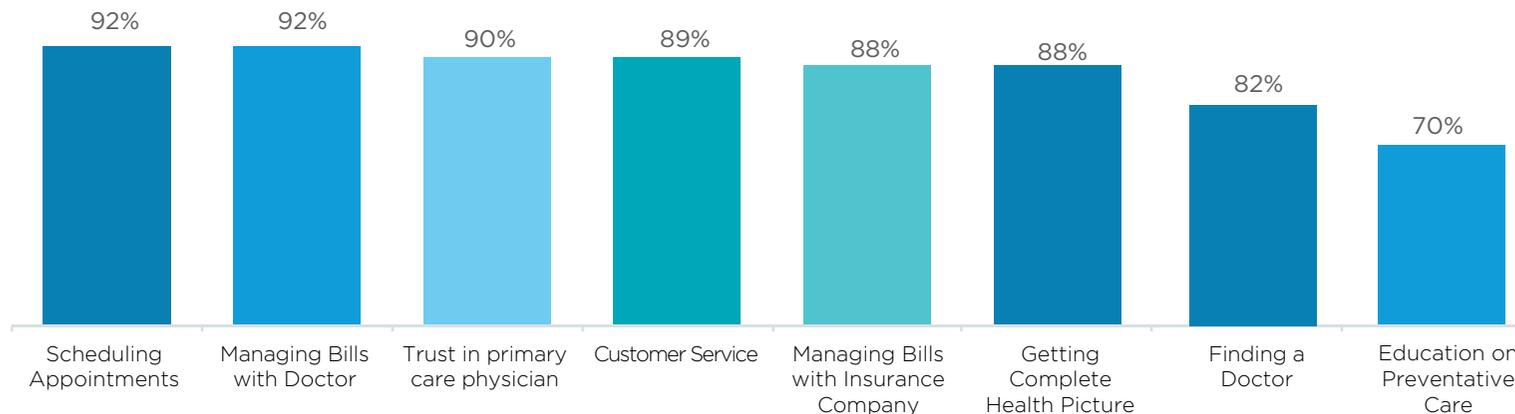
Patient Satisfaction and Behavior



The Doctor is In



Patient Satisfaction with Common Healthcare Features



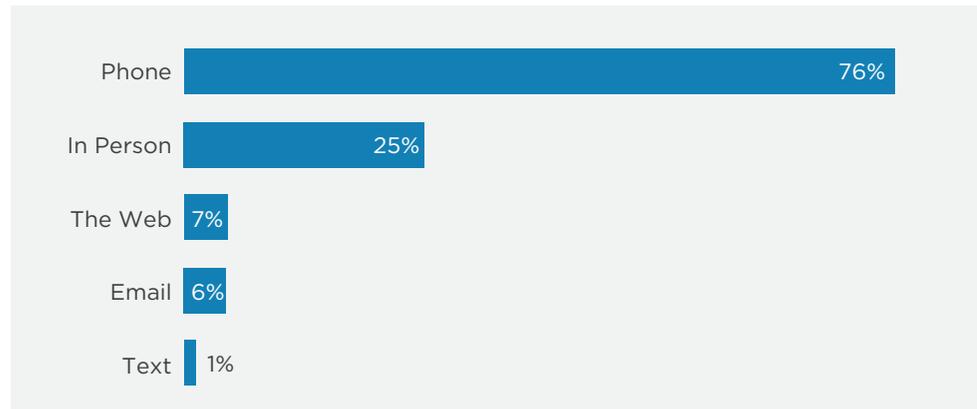
How Patients Currently Connect with Providers

Today, most patients rely on traditional communication methods when connecting with their healthcare providers. Setting up appointments via phone is the most common way to set up appointments (76% of patients use this method), followed by in-person scheduling (25%). Reviewing health data is still most commonly done in person (39% of patients do this).

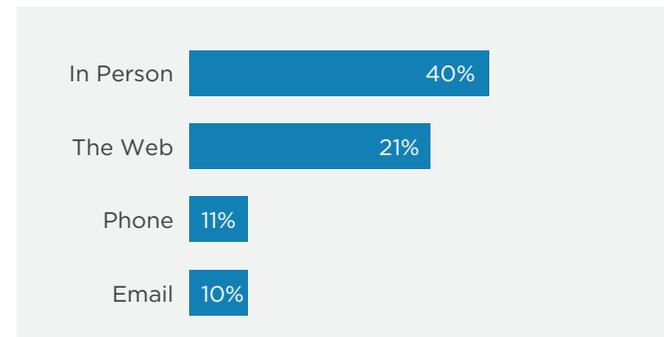
But web portals are making gains when it comes to reviewing health data: 21% of patients review their health data via web portal, while only 11% review data by phone.

New channels like online health portals, email, and text messaging will likely grow in popularity as patients become more mobile and constantly connected.

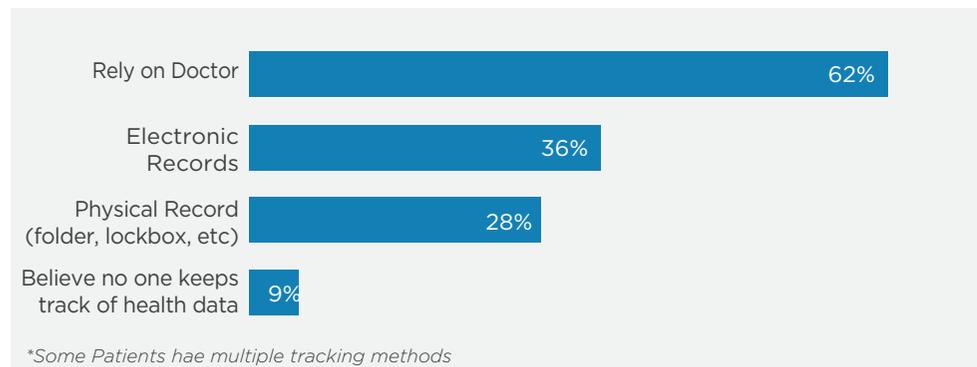
How do you currently set up an appointment with your Primary Care Physician?



How do you currently review your health data from your Primary Care Physician?

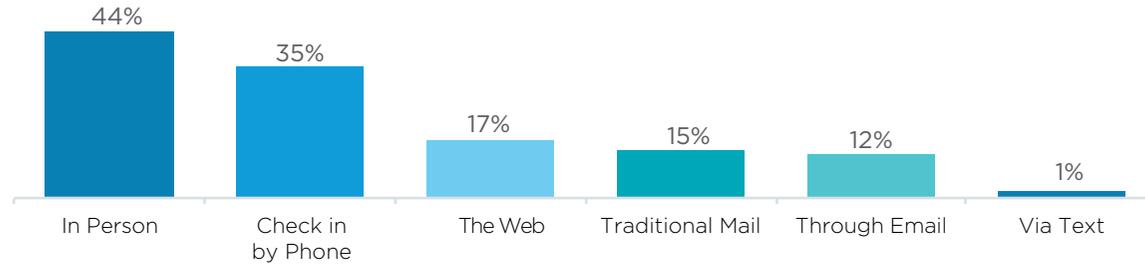


How do you currently keep track of your health data?

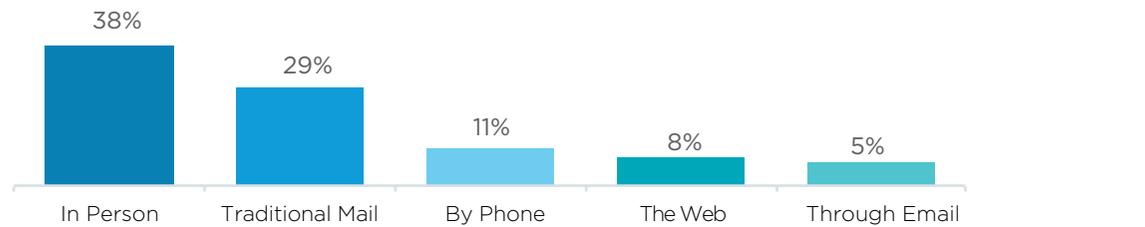


How Patients Currently Connect with Providers

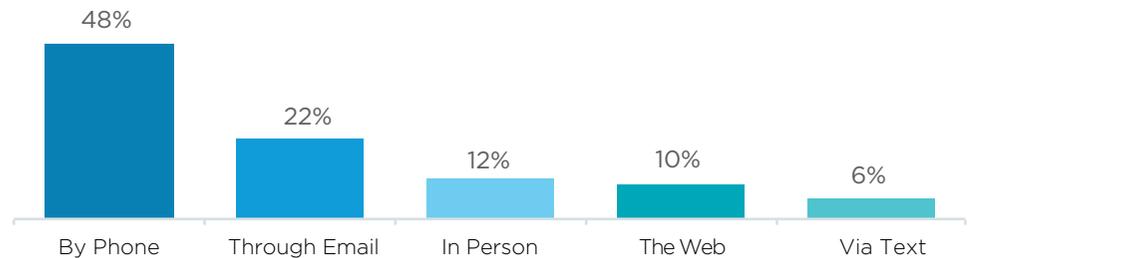
How do you currently get test results from your Primary Care Physician?



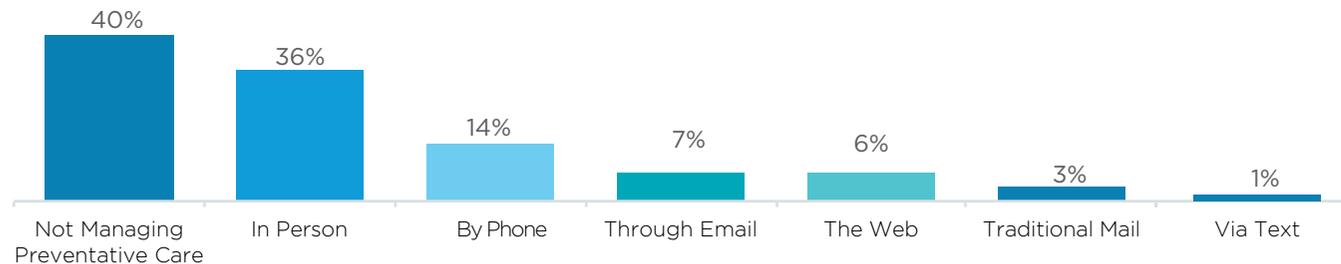
How do you currently pay your health bill?



How do you get reminders (appointments, prescriptions, etc.) from your Primary Care Physician?



Are you managing preventative care (exercising, eating correctly, etc) with your doctor?



What Does the Future of Health Look Like?

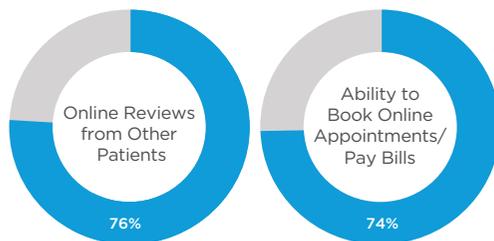
While traditional communication channels remain popular among patients, the next generation of patients want innovations for how they connect with providers and share information. In this part of the report, we surveyed American millennials (millennials defined as currently aged 18-34 for this survey) whose opinions are important, as their preferences and habits represent the future of healthcare expectations, consumption and delivery. One surprising result we found is that 40% of millennials said they do not think their primary care physician would recognize them if they passed each other on the street.

Technology yields huge potential for improving the management of our health. Both healthcare providers and insurance companies have an

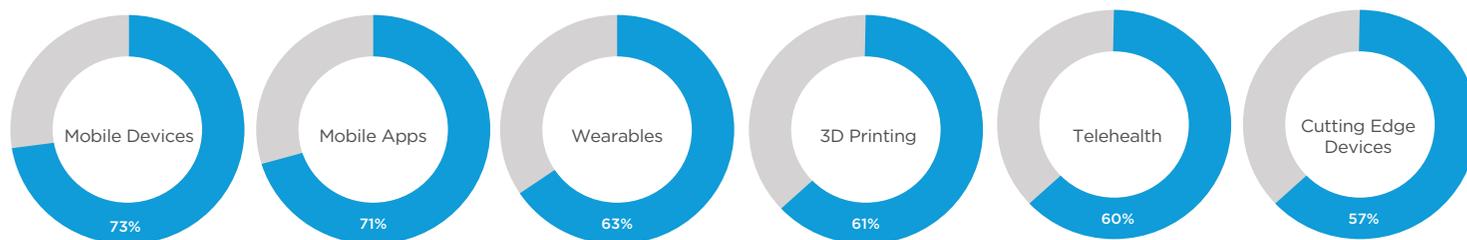
opportunity to revolutionize healthcare in meaningful new ways, thanks to the power of connectivity. From wearables that encourage users to take extra steps throughout the day to mobile apps that instantly share patients' data, the future of healthcare is bright.

Mobile devices and mobile apps top the list of technologies that patients would like to see included in their health experience. Beyond mobile tools, 61% of insured millennials are interested in 3D printing devices to aid their health, and 57% would be interested in cutting-edge tools like pills that can monitor internal vitals when swallowed.

What criteria do millennials value when selecting a doctor?



How interested are American millennials in using technology in their health experience?



73% of millennials are interested in their doctors using mobile devices during appointments to share information.

71% of millennials would be interested in a doctor giving them a mobile app to actively manage their well-being for preventative care, review health records, schedule appointments.

63% of millennials would be interested proactively providing their health data from Wifi/wearable devices to their doctor/provider so they can monitor their well-being.

61% of millennials would be interested in 3D printing for devices necessary health (prosthetics, hearing aids etc.)

60% of millennials are interested in using telehealth options (e.g., video chat with a doctor) so they don't have to come into the office for an appointment.

57% of millennials would be interested in cutting-edge devices like pills that can monitor their internal vitals when swallowed.

Methodology

Methodology

This Salesforce 2015 “State of the Connected Patient” Report is based on a survey, funded by Salesforce and conducted online within the United States, Jan. 6-8, 2015, among 2,095 adults, ages 18 and older, by Harris Poll via its Quick Query omnibus product. Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was used to adjust for respondents’ propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Poll avoids the words “margin of error,” as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100 percent response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in Harris Poll surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in the Harris Poll panel, no estimates of theoretical sampling error can be calculated.



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