

INDUSTRY RESEARCH: HEALTHCARE AND LIFE SCIENCES

2017

# CONNECTED PATIENT REPORT

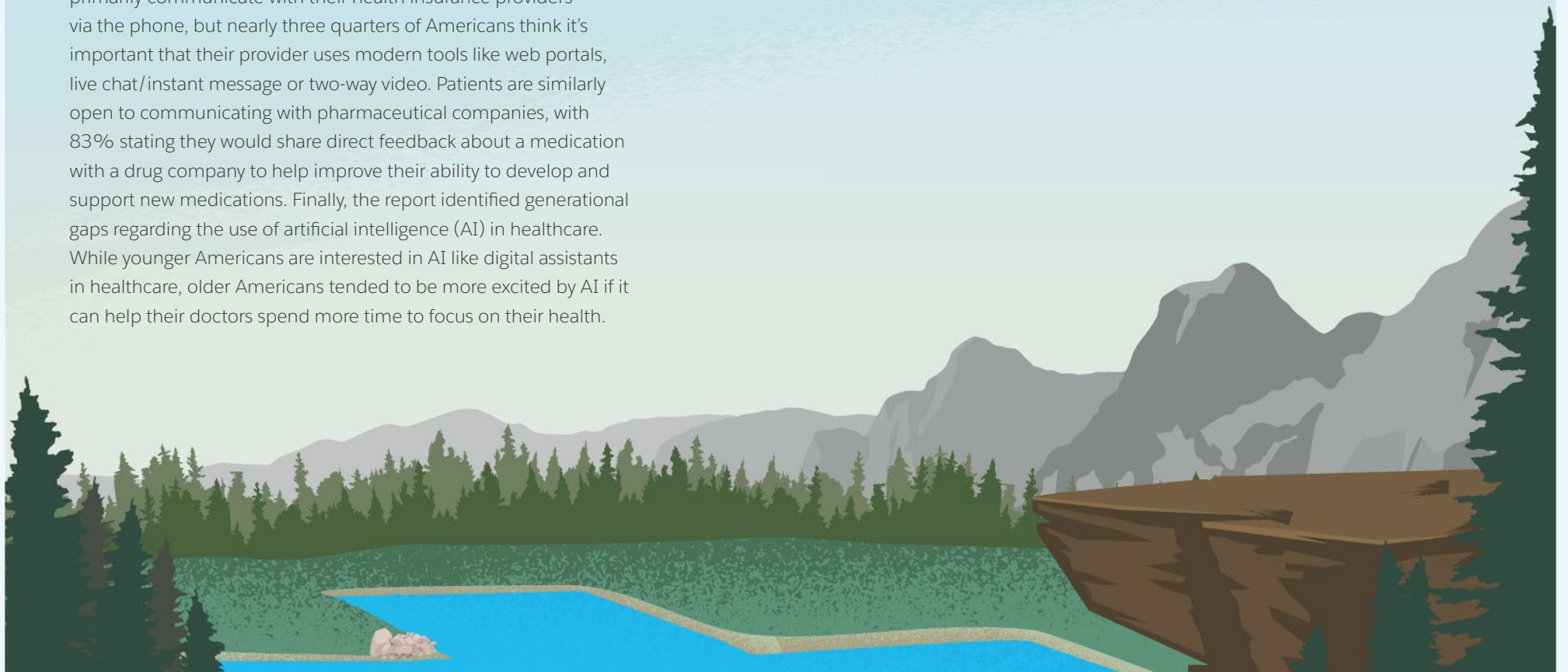
The trail map for understanding  
today's digital patient



# Introduction

To understand how Americans communicate with their healthcare providers, insurance payers and pharmaceutical firms – and their thoughts on up-and-coming technologies in healthcare such as artificial intelligence (AI) – Salesforce commissioned its “2017 Connected Patient Report.” The survey was conducted online by Harris Poll on behalf of Salesforce from May 4-8, 2017, among 2,083 U.S. adults, ages 18 and older, among whom 1,893 have health insurance.

The data shows that a number of American patients (defined as those who have health insurance and a primary care doctor) primarily communicate with their health insurance providers via the phone, but nearly three quarters of Americans think it's important that their provider uses modern tools like web portals, live chat/instant message or two-way video. Patients are similarly open to communicating with pharmaceutical companies, with 83% stating they would share direct feedback about a medication with a drug company to help improve their ability to develop and support new medications. Finally, the report identified generational gaps regarding the use of artificial intelligence (AI) in healthcare. While younger Americans are interested in AI like digital assistants in healthcare, older Americans tended to be more excited by AI if it can help their doctors spend more time to focus on their health.

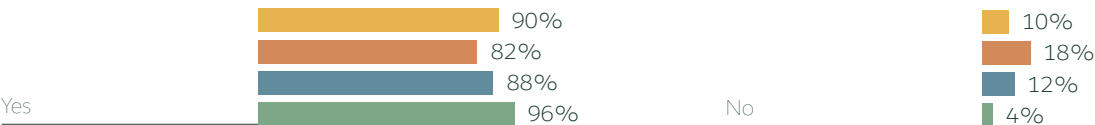


# I. Doctor-patient communication today

To schedule appointments, a majority of American patients currently communicate with their doctors via traditional channels, with 80% using the phone, compared to online portals (13%) or email (9%).

Base: All Respondents

Do you have health insurance?



Base: Have Health Insurance and Primary Care Doctor

Which of the following, if any, do you use to communicate with your primary care doctor for each of the following? Set up an appointment

	Total	Millennials (18-34)	Generation X (35-54)	Baby Boomers (55+)
Phone	80%	79%	82%	80%
In person	25%	32%	24%	22%
Portal	13%	15%	14%	11%
Email	9%	16%	8%	6%
SMS/Text	3%	9%	1%	*
Mail	2%	7%	1%	*
Chat/IM	1%	5%	1%	*
Other	1%	*	-	1%
Not applicable	3%	6%	3%	2%

An asterisk (\*) signifies a value of less than one-half percent.

A dash represents a value of zero

Total

Millennials (18-34)

Generation X (35-54)










































Baby Boomers (55+)

# I. Doctor-patient communication today

Yet when communicating with primary care doctors to view their health data, such as medical records or lab results, patients tend to use more modern technologies, with online portal use at 35%, and email use at 14%.

*Base: Have Health Insurance and Primary Care Doctor*

Which of the following, if any, do you use to communicate with your primary care doctor for each of the following? Look at my current health data (e.g., medical records, lab results).

	Total	Millennials (18-34)	Generation X (35-54)	Baby Boomers (55+)
 Phone	 22%	 29%	 21%	 19%
 In person	 41%	 44%	 36%	 44%
 Portal	 35%	 32%	 35%	 36%
 Email	 14%	 18%	 14%	 13%
 SMS/Text	 2%	 5%	 1%	*
 Mail	 10%	 17%	 10%	 7%
 Chat/IM	 1%	 3%	 1%	*
Other	 2%	 2%	 1%	 2%
Not applicable	 14%	 16%	 14%	 12%

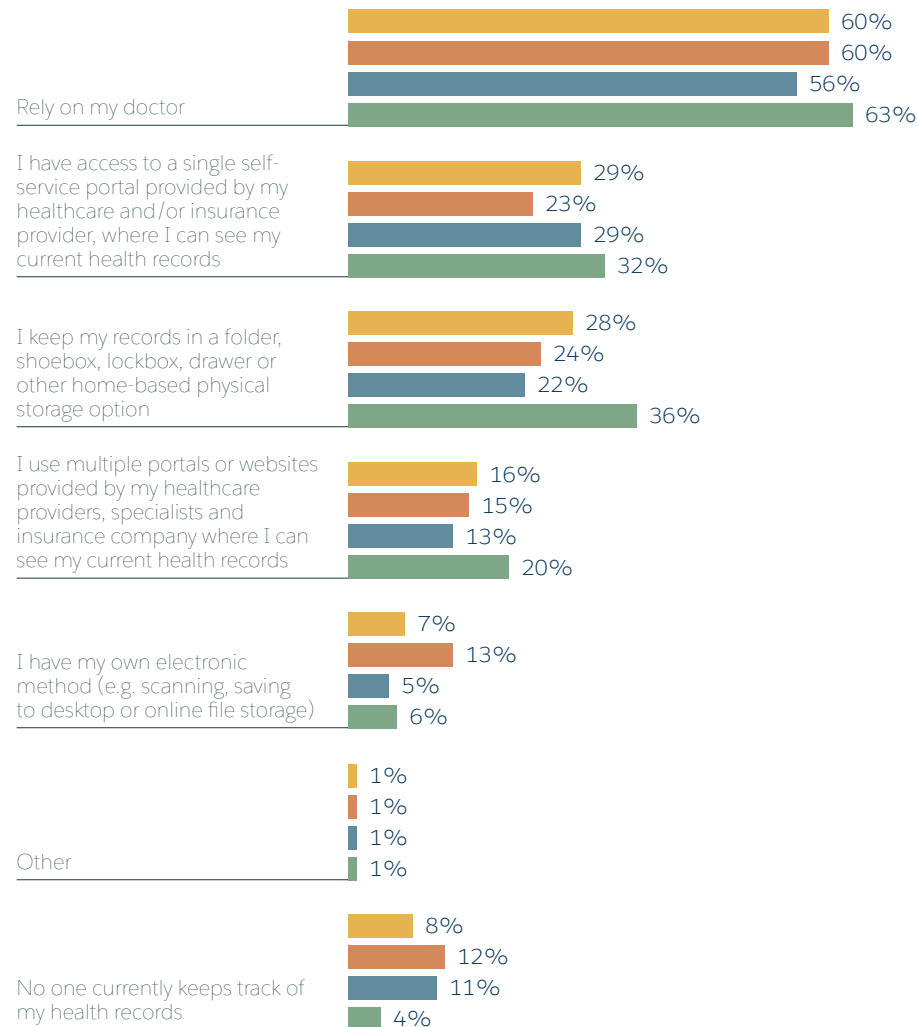
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# I. Doctor-patient communication today

Three in five American patients (60%) say they rely on their doctors to keep track of their health records. Twenty-nine percent of patients have access to single self-service portals provided by their healthcare and/or insurance providers. Another 28% still keep their records in a folder, shoebox, lockbox, drawer or other home-based physical storage method.

Base: Have Health Insurance and Primary Care Doctor  
How do you currently keep track of your health records?



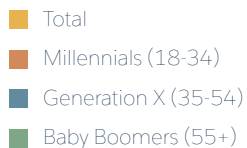
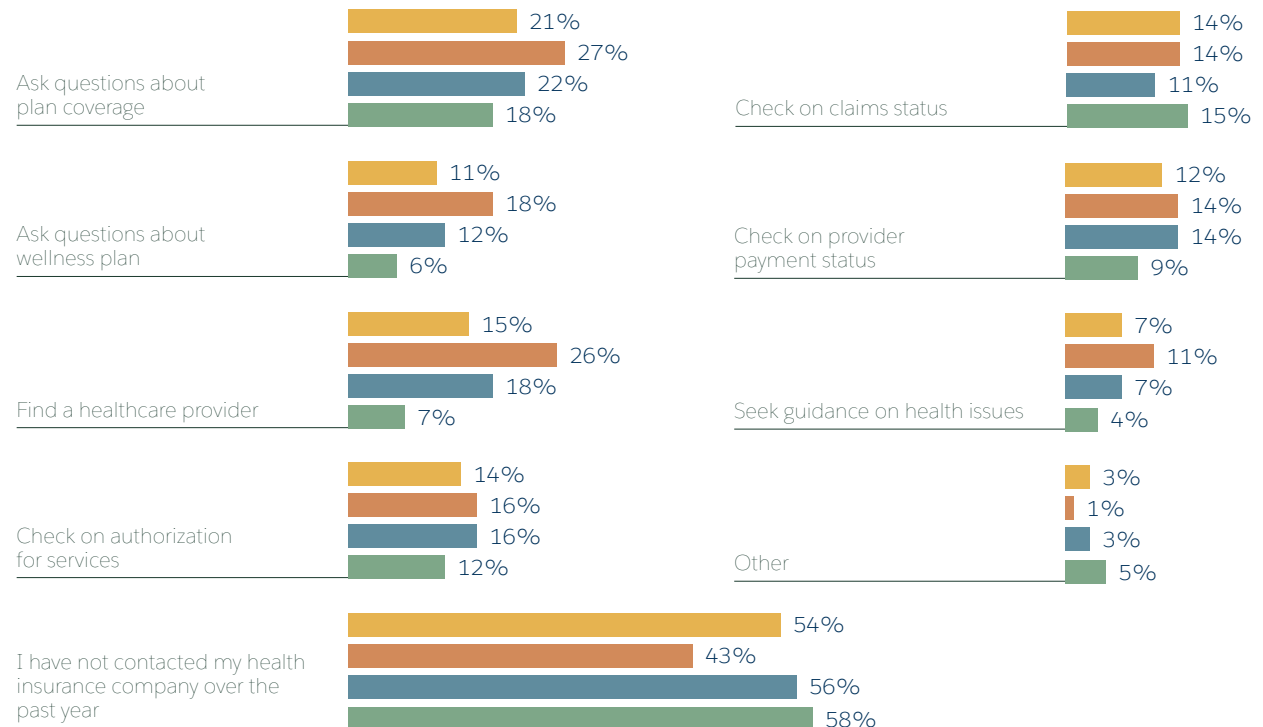
■ Total  
■ Millennials (18-34)  
■ Generation X (35-54)  
■ Baby Boomers (55+)

## II. Communication between patients and insurance companies

Less than half of Americans with health insurance have contacted their health insurance company in the past year, according to the survey, primarily to ask about plan coverage (21%), find a provider (15%), check on authorization services (14%) and check the status of claims (14%). Interestingly, more than a quarter of millennials (ages 18-34) (26%) did so in order to find a healthcare provider, compared to just 7% of baby boomers (ages 55+).

*Base: Have Health Insurance*

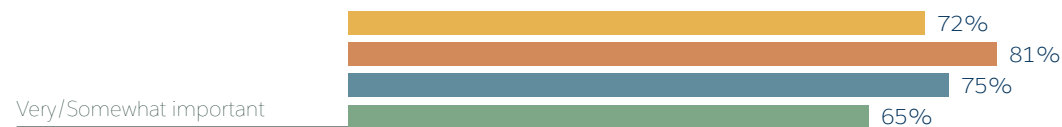
For which of the following reasons have you contacted your health insurance company within the past year?\*



## II. Communication between patients and insurance companies

Health insured Americans today communicate with their health insurance providers primarily through traditional channels. In fact, when it comes to asking about their bills, claim status benefits coverage, or health issues, they use the phone (83%) or email (47%). However, nearly three quarters of health insured Americans (72%) say it's important that their health insurance provider uses modern communication tools – such as a web portal, live chat/instant message and two-way video – for communicating.

How important is it that your health insurance provider uses modern tools for communicating (e.g., web portal, live chat/instant message, two-way video)?\*



In what ways can you contact your health insurance provider when you have questions about your bills, claims status, benefits coverage or health issues?\*

	Total	Millennials (18-34)	Generation X (35-54)	Baby Boomers (55+)
Phone	83%	75%	81%	88%
Email	47%	46%	44%	49%
Web/Online portal	41%	37%	40%	44%
Live chat/Instant message	13%	17%	12%	11%
SMS/Text	6%	11%	5%	4%
Mail	31%	28%	27%	36%
Video chat	4%	6%	2%	4%
Other	1%	-	1%	2%

An asterisk (\*) signifies a value of less than one-half percent.

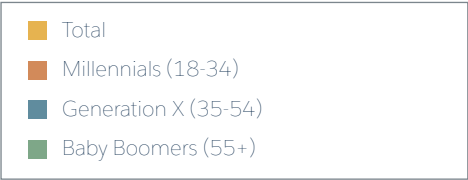
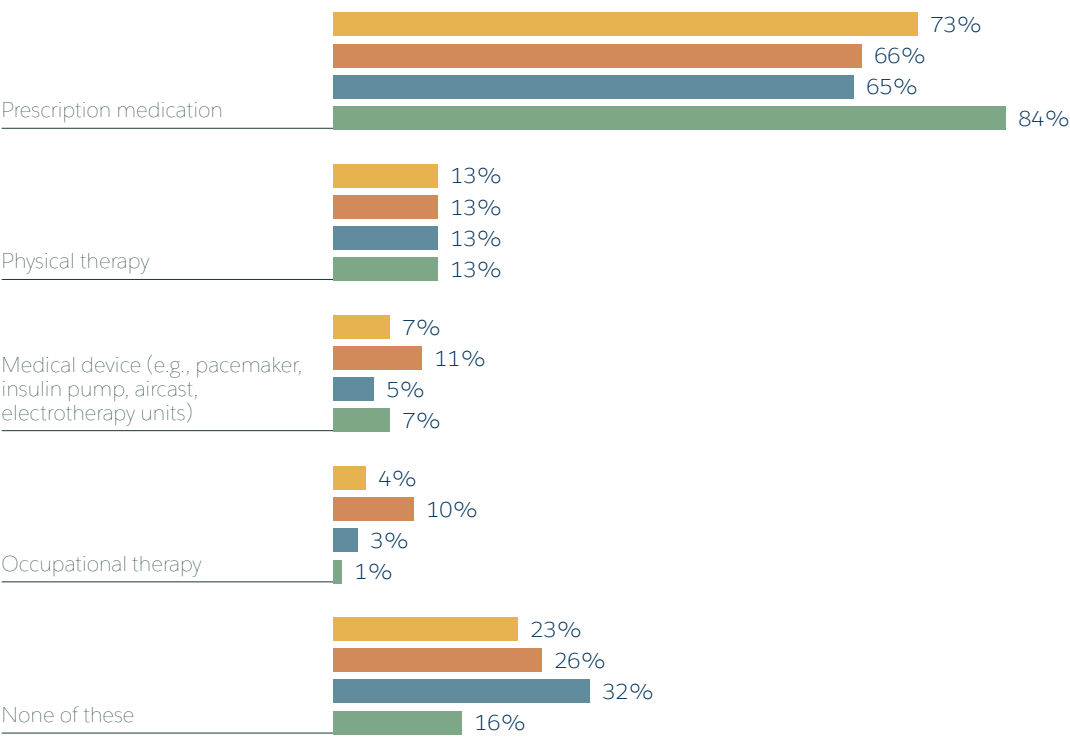
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\*Base: Have Health Insurance

# III. Pharma’s increasing role in patient outcomes

Nearly three out of four patients (73%) have been prescribed medication in the past 12 months.

Base: Have Health Insurance and Primary Care Doctor  
Which of the following have you been prescribed in the past 12 months?

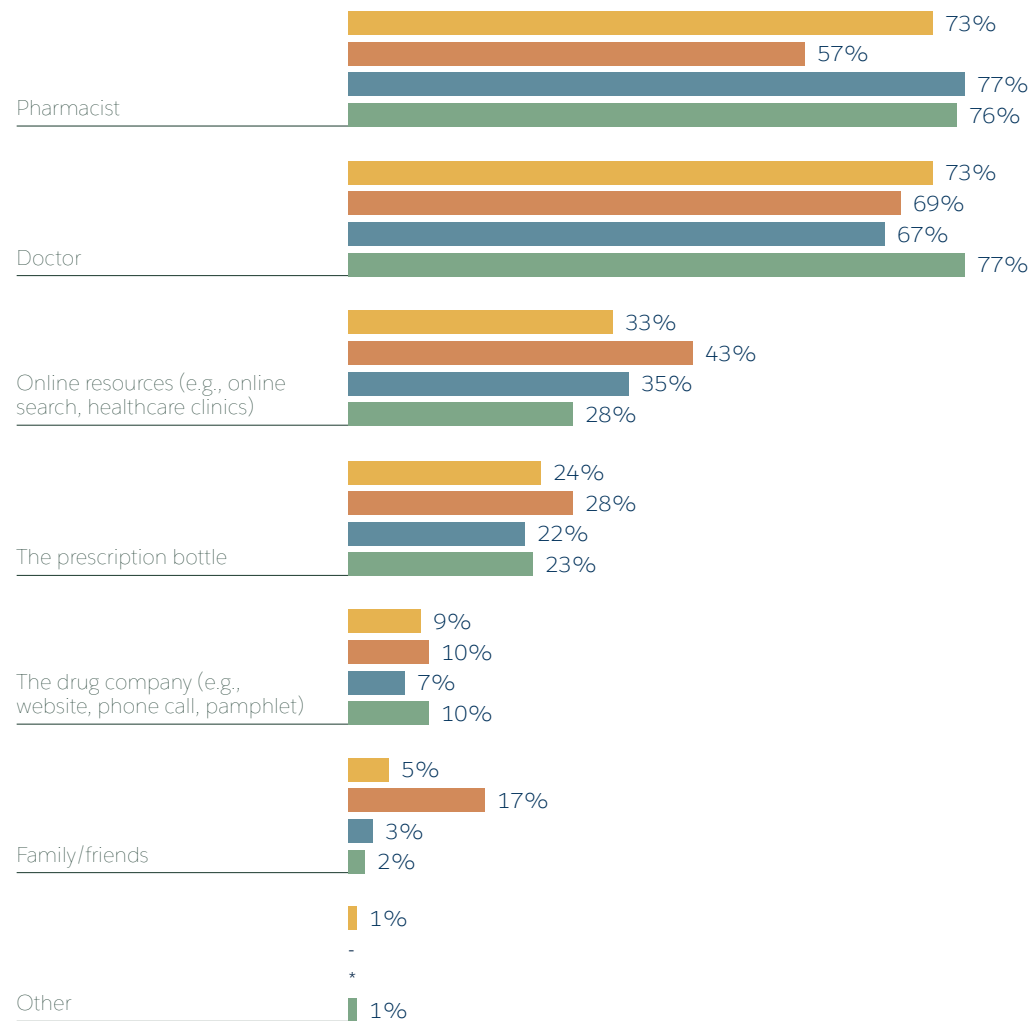


### III. Pharma's increasing role in patient outcomes

If patients who have been prescribed a medication in the past 12 months have a question, they primarily reach out to their pharmacists (73%) or their doctors (73%) for support.

*Base: Prescribed prescription medication in past 12 months*

If you have a question about your prescription medication whom would you reach out to/where would you look for support? Select all that apply.



A dash represents a value of zero

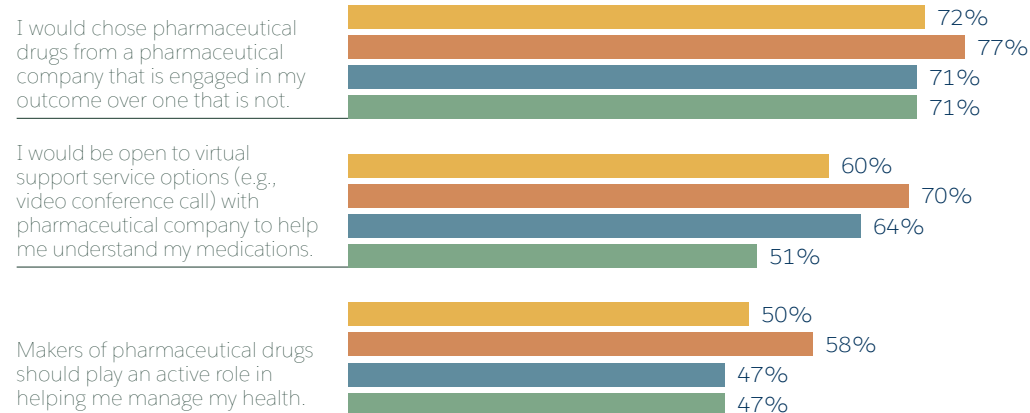
- Total
- Millennials (18-34)
- Generation X (35-54)
- Baby Boomers (55+)

### III. Pharma's increasing role in patient outcomes

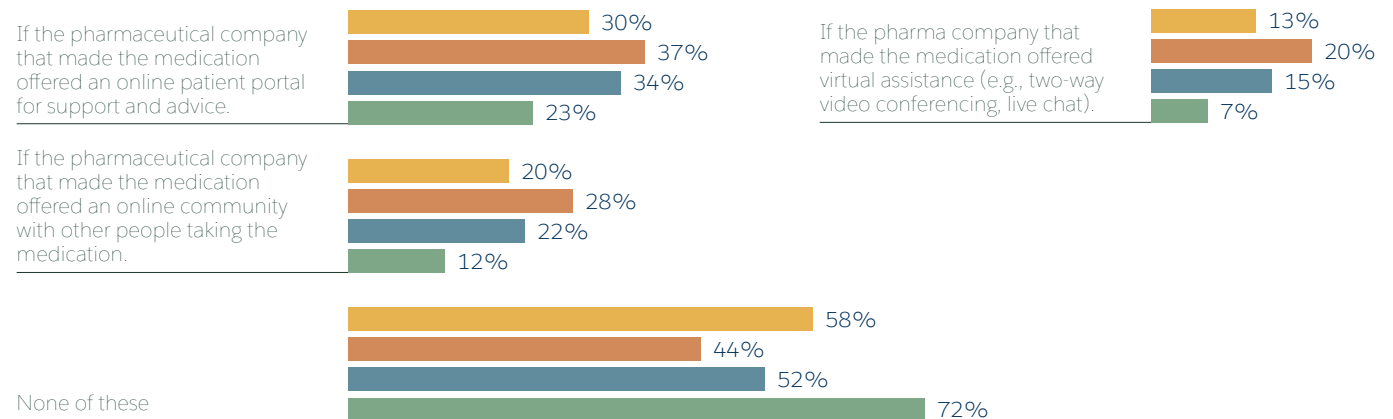
As the healthcare industry rotates toward improving patient outcomes, pharmaceutical companies are also working to improve direct communication with patients. Interestingly, 72% of Americans agree that they would choose drugs from a pharmaceutical company that is engaged in their outcome vs. one that is not.

Three in five Americans (60%) are open to virtual support service options (e.g., video conference call) with pharmaceutical companies to help them understand their medications, particularly millennials (70%).

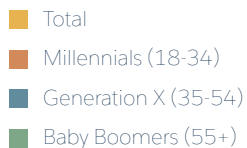
#### How much do you agree or disagree with the following statements? - Summary of Strongly/Somewhat agree



#### Which of the following offerings would make you more willing to ask your healthcare provider for a specific brand of medication?



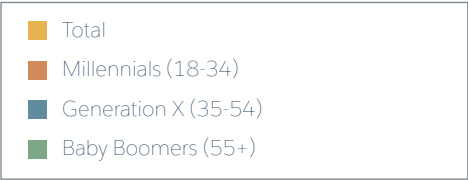
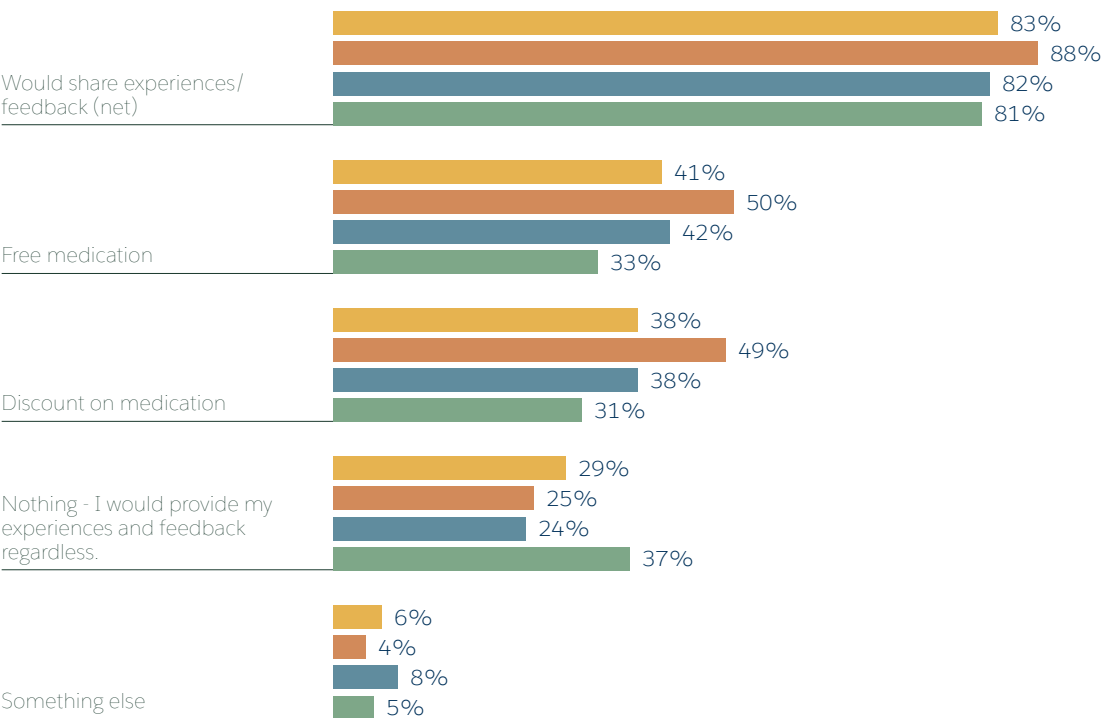
\*Base: All Respondents



### III. Pharma's increasing role in patient outcomes

In addition, more than four in five Americans (83%), and 88% of millennials, would share their experiences and direct feedback about a medication with a pharmaceutical company to help improve their ability to develop and support new medications.

Base: All Respondents  
Which of the following would make you likely to share your experiences and direct feedback about a medication with a pharmaceutical company to help improve their ability to develop and support new medications?



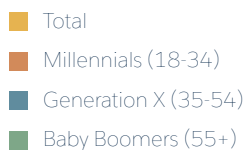
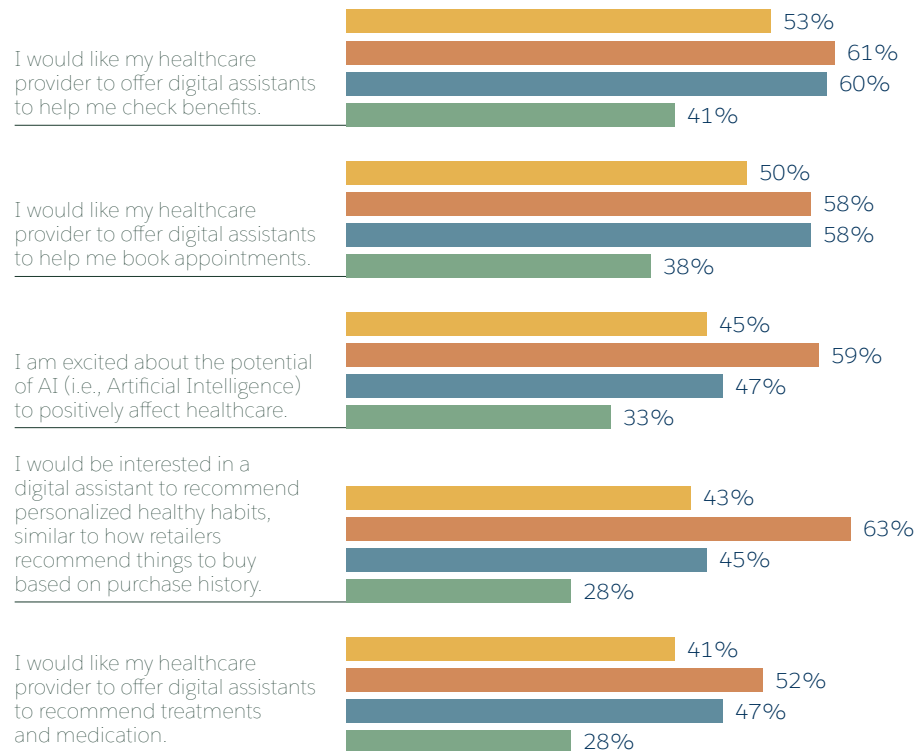
## IV. AI in health causes optimism and concern

Enthusiasm for the potential applications of artificial intelligence in healthcare varies by generation, with a majority of millennials (59%), indicating that they are excited about the potential of AI to positively affect healthcare, compared to 33% of baby boomers.

When asked about currently available AI applications, baby boomers (28%) were significantly less likely than millennials (63%) to agree that they would be interested in a digital assistant to recommend personalized healthy habits, similar to how retailers recommend things to buy based on purchase history.

*Base: All Respondents*

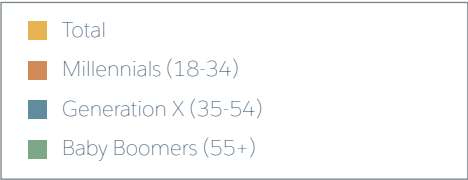
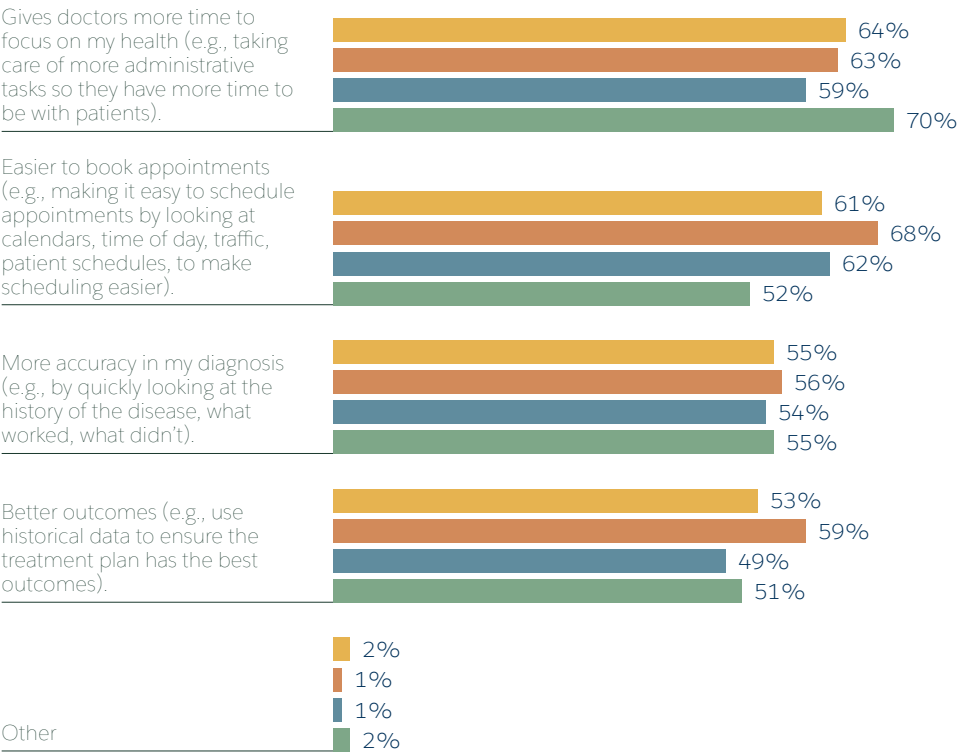
How much do you agree or disagree with the following statements? Summary of Strongly/Somewhat Agree



# IV. AI in health causes optimism and concern

Of the baby boomers that are excited about the potential of AI in healthcare, 70% say the reason is it can give doctors more time to focus on their health, such as taking care of more administrative tasks so they have more time to be with patients.

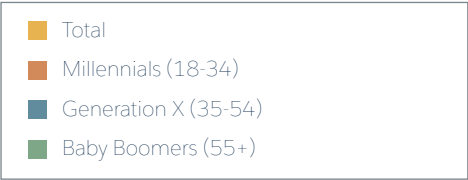
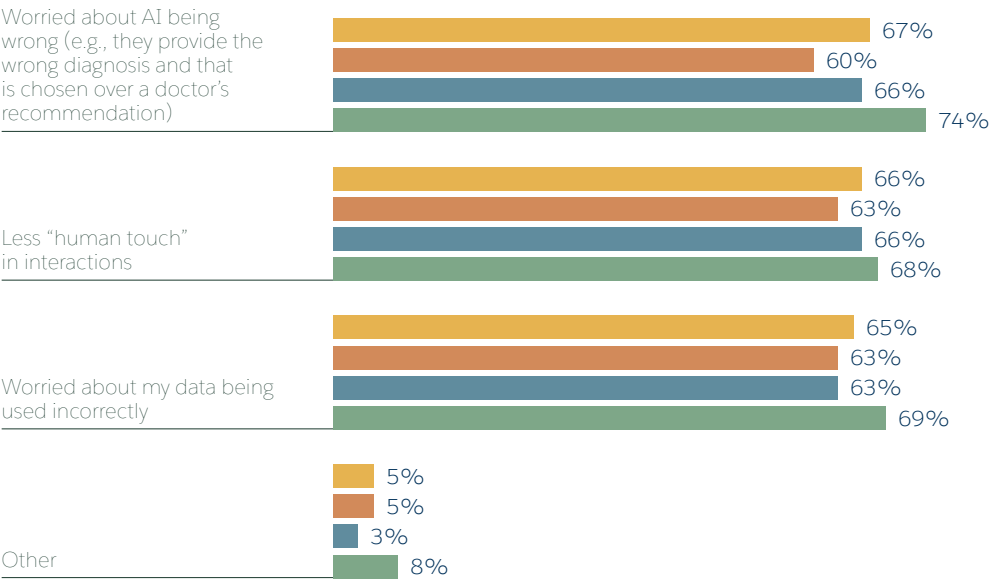
Base: Excited about AI impact on healthcare:  
Which of the following are reasons why you are excited about the potential of AI (i.e., Artificial Intelligence) to positively affect healthcare? Please select all that apply.



# IV. AI in health causes optimism and concern

Among baby boomers that are concerned about the impact of AI on healthcare, 74% are worried about AI providing an incorrect diagnosis that is used over a doctor's recommendation – something only 60% of millennials are worried about.

Base: Worried about AI impact on healthcare  
Which of the following are reasons why you are worried about the potential of AI (i.e., Artificial Intelligence) to negatively affect healthcare? Please select all that apply.



## V. Research Methodology

This survey was conducted online within the United States by Harris Poll on behalf of Salesforce from May 4-8, 2017, among 2,083 U.S. adults ages 18 and older, among whom 1,893 have health insurance and 1,785 are “patients.” This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables, please contact Joel Steinfeld at [jsteinfeld@salesforce.com](mailto:jsteinfeld@salesforce.com).

