

2014

**HEALTH
TRENDS**

[HXP]

G5W
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GSW
INVENTIV HEALTH

In partnership with the Health Experience Project, GSW has expanded its fourth annual trends report to include a broader look at the shifts that are changing healthcare marketing.

2014 TRENDS

Consumer ● Marketing ● Digital ● Healthcare ●

Overview

Do you ever get the feeling that healthcare and people are just missing each other? Healthcare is full of “do this” and “take that” directives. And people ... well, people are full of good intentions, everyday missteps, and the hope that it will get better.

The kinds of experiences we need to build today – to get people off the sidelines, to change behavior, to earn commitment – aren’t healthcare-marketing-as-usual. Instead, they’re innovative approaches that engage people in new ways.

Here’s the real challenge, though: We live in a world of rapidly changing expectations. But, our approval processes aren’t as fast. They’re long and rely more on insulating risk than innovating experience.

The opportunity is finding the smart risks, the ones that can truly change our marketplaces. To prepare for where the world is going – not just respond to where it’s been.

That’s where trends come in.

We look at trends to understand our customers' new expectations for brand interactions. The ones built on their day-to-day experiences with technology, culture, and media.

This year, we've uncovered actionable trends in four key areas: consumer, marketing, digital, and healthcare. We'll use those trends to systematically point to new opportunities for healthcare marketers and spur innovation.

We'll ask, "What Could Be?" for healthcare brands and customers. And deliver bold new solutions that change that business-as-usual game.

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- Health Trends 2014

2014: the year when we're each increasingly expected to be our own Chief Health Officer – whether we like it or not. That means we're expected to find our own answers, to make critical connections, and to help ourselves be healthier ... all in one of the most complex systems on earth.

We're following eight trends that uncover the context of this shift in responsibility and point to the shifts in experience that will make it a success:

1. More care, less connectivity
2. Shaking up settled science
3. From biometrics to mind metrics
4. App'versation in the exam room
5. Innovation from outsiders
6. The unprepared patient
7. The perfect payer storm
8. Digitally dependent caregivers

1.

MORE CARE, LESS CONNECTIVITY

In Short

People are spending less time with their doctors and more time with snack-sized healthcare.

[HXP]



The Other White Coat

Pharmacists are the healthcare provider almost everyone has access to – a white coat who doesn't require an appointment and is within a few miles of home. Increasingly, those neighborhood white coats are doing more than administering flu shots; they're becoming active providers of care.

They're being trained to be specialists in motivational interviewing, adherence, and management of specific chronic conditions. Even staying with patients as they make the transition into those successful first months of treatment.

Telehealth Tipping Point

2014 is the year telehealth goes completely mainstream. The Johns Hopkins Bloomberg School of Public Health recently reported that 12% of care may soon be delivered remotely.

The biggest players in that category today are remote primary care services. Companies like Teledoc, American Well, and Doctors on Demand offer remote services

through insurance companies and direct to consumers. For a flat fee, they can connect a member with a physician anywhere and at any time via phone or video consultation. These customers are likely already on their computers when they're at the point of care.

The Rise of Population Health

For years now, healthcare providers around the world have been talking about the Triple Aim goals for health:

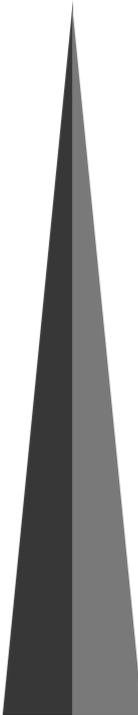
1. Improve population health
2. Increase patient satisfaction
3. Reduce per capita healthcare costs

This year, population health will come into renewed focus, thanks to more proactive care coordination by employers, health systems, and governments. Their goal: Identify health risks early and create incentives designed to improve the outcomes of key clinical populations.

Fastest-Growing Telehealth Program

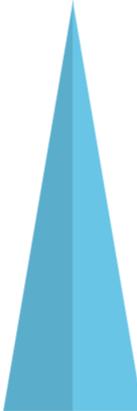
Over the last 12 years, the U.S. Veterans Administration has been building the Care Coordination/Home Telehealth (CCHT) program, one of the fastest-growing telehealth programs in the world:

500,000



Veterans who've used telehealth

29%



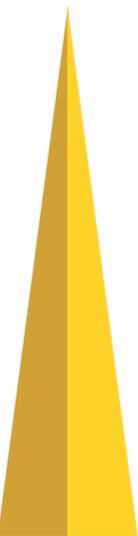
Program growth rate

58%



Reduction in patient bed days

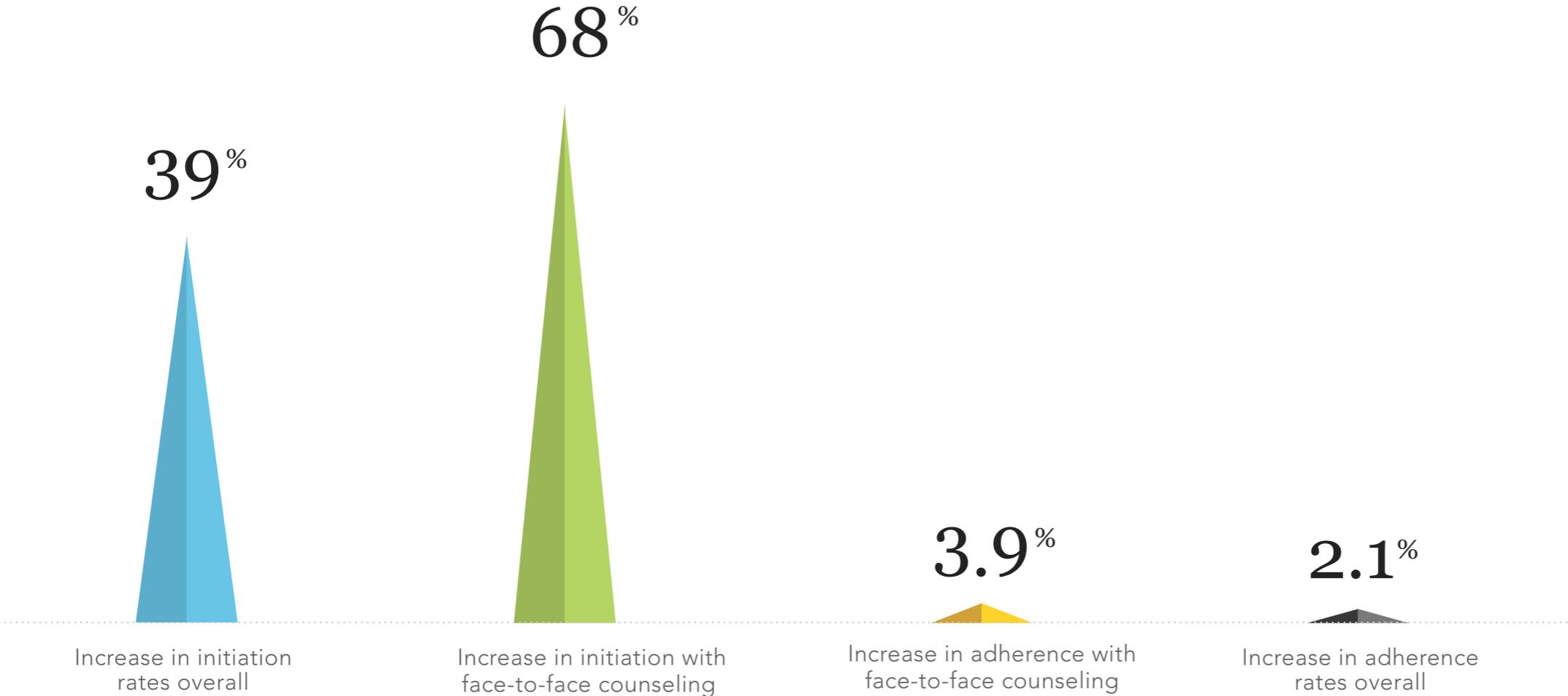
38%



Reduction in hospital readmission

CVS's Pharmacy Advisory Program

Focused on providing expert support to people with diabetes and cardiovascular disease, this program increased both medication adherence rates and physician initiation of prescription.



2.

SHAKING UP SETTLED SCIENCE

In Short

Time to rethink just who the bad guys in chronic disease really are.

[HXP]



Ending the Finger Wagging

For years the way we approached management of chronic conditions from diabetes to hypertension was to assign blame and penance – you did that to yourself, so now you have to do this.

New understandings about biology and neurology are leading many to question that settled science. This is the year we put that wisdom to work.

Doctors on the Front Lines Are Looking Beyond Behavior

Dr. Peter Attia is just one of the many clinicians who are questioning long-held hypotheses about the enemies of lasting health. They're part of a generation that's grown up with wave after wave of contradictory science, particularly about nutrition (eggs were good, then bad, then good; calories important, then the importance of calories debunked).

Neuroscience is Pointing the Way to Lasting Change

What we know about the science of behavior change has evolved rapidly in the last 10 years.

From the role of commitment in choice to limitations created by the hardwiring in our genes to proven ways people can really change behavior, the science is overtaking the superstition.

In 2014, the discussion won't be about willpower, it will be about smart, personal strategies to treat with medicine and engage in behavior change.



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Couch Potato Gene

Researchers at the University of Alabama at Birmingham investigated the exercise patterns of 3200 university students. They found that participants with a certain variation of the FTO gene have a harder time staying with an exercise program than those participants with an alternate form of the gene. Those with the particular variation feel exercise is difficult and unpleasant. Previous research has linked the FTO gene with obesity and increased body mass index (BMI).

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“What if diabetes and obesity are the symptoms of a much deeper problem? What if obesity is the effect, not the cause, of insulin resistance?”

- Dr. Peter Attia

1, 2, 3

In healthcare, many are saying that the first three months on a new treatment or with a new behavior are crucial. In the first 100 days, people both power through any side effects and start to feel positive effects of change.

As typical MOAs become commoditized, researchers are looking beyond the settled science, too.

They're challenging conventional thinking – like looking for diabetes treatments that go “beyond the pancreas” and personalizing treatments using the genome.

3.

FROM BIOMETRICS TO MIND METRICS

In Short

Whether working to keep our health or fighting to restore it, 8 hours a day can keep the doctor away.

[HXP]

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Zzzzzzz

Sleep is the go-to prescription of 2014. Nutritionists hail its weight-loss powers, OTC manufacturers promise mood restoration, and researchers of all ilks say it just works.

Sleep is just one of a whole new set of measures of health. Benchmarks that go beyond the typical quantifiable measures of calories, weight, and blood pressure to more subjective considerations of mood, stress, and satisfaction.

Why Gen Y?

Ask your average millennial the cause of their cold, acne, or even diabetes, and they're likely to point the finger at stress. Turns out they're right.

"Stress is a huge factor when we look at medical problems such as obesity, hypertension, diabetes, cardiac disease ..."

- Dr. Nancy Snyderman, NBC's chief medical editor

More Than a Mood Ring

The first generation of wearables helped consumers track their steps and miles. The next one is focused on tracking and improving mental well-being with sensors that record sleep, stress, focus, and mood.

With all the latest sensors built in, smartphones are a huge player in this new "portable stress management" marketplace. Apps and peripheral tools can make managing sleep and negative emotions a critical part of gaming, music selection, even daily planning.

Learn More >



Zzzzzzz

Sleep is the go-to prescription of 2014. Nutritionists hail its weight-loss powers, OTC manufacturers promise mood-boosting benefits, and doctors say it just works.

Sleep is just one of the keys to good health. Benchmarking sleep as a quantifiable measure of stress, and satisfaction.

Why Gen Y?

Ask your average Gen Yer about acne, or even dandruff, and you'll find a finger at stress.

"Stress is a huge problem such as cardiac disease"

- Dr. Nancy Snyder



Stress

According to Stress in America, a study commissioned by the American Psychological Association, millennials are the most stressed generation – and the one most struggling to deal with it.

Those higher levels of stress may put them at higher risk for all sorts of destructive downstream consequences. That's leading many to look for ways to proactively manage it.

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[**Learn More >**](#)



The Android Remote Sensing App (AIRS)

This app logs stressful moments in users' lives to help manage pressure and improve their general health. It uses all the sensors built into mobile devices to measure physical changes. It also records environmental noise and tracks calls and text messages.

There are over 60 values the app can record, including:

- Surrounding noise levels
- Social activity
- Environmental conditions
- Light level
- Posture

Melon

The Melon headband tracks users' mental focus during a range of activities. The headband measures brain activity using EEG, and algorithms detect focus levels, using the data to give personalized feedback. Users can input external factors via the app to discover how time of day, weather conditions, and environment all influence their ability to generate and sustain focus.



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The Melon headband



4.

APP'VERSATION IN THE EXAM ROOM

In Short

In 2014, we'd rather download good health than swallow it.

[HXP]

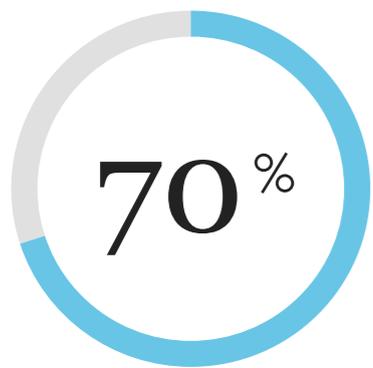
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Participatory Care

Today's empowered patients want more than a diagnostic and a prescription.

They want to participate in their care by bringing new data points to the conversation and taking action to improve their health with new tools and digital coaching.

The big news: They're looking to their doctors to be their guides.

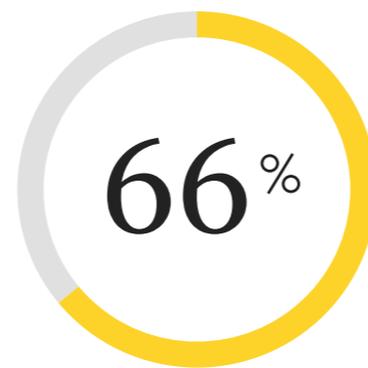


70% of doctors have at least one patient who's bringing self-tracking data into the exam room

App Store Rx

A recent study of 2000 people living with chronic disease (respiratory, cardiological, CNS, gastroenterological, and diabetes) found that 66% would accept a prescription for a new medicine from their doctor, but 90% would take the offer of a mobile app.

They also found that people who choose to use mobile health aren't always the newly diagnosed (i.e., people trying to figure out how to live with a disease for the first time). In fact, over 60% of active mobile health users were diagnosed more than three years ago.



66% would accept a new prescription from their doctor



90% would accept the use of a mobile app from their doctor

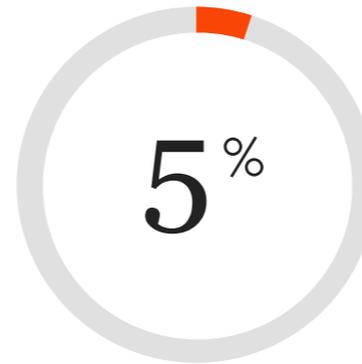
Text Me in the Morning

Of course, not all supportive mobile health starts with a download. Text messages can be an incredibly powerful wellness tool, too.

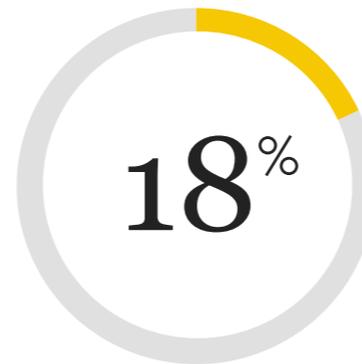
They're actually more likely to reach the households that overindex for health challenges like obesity and diabetes.

Pew Research reports that households earning \$30,000 or less send and receive an average of 60 texts a day, double the number handled by \$75,000-plus households.

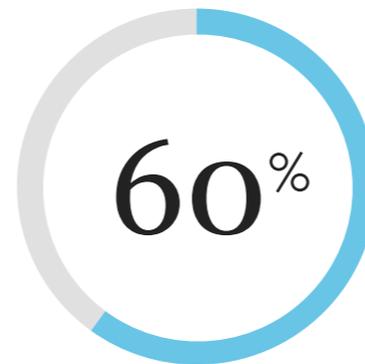
MobiHealthNews calls text messages the "uncelebrated work horse" of mHealth. When it comes to day-to-day support, SMS has delivered better outcomes in compliance, nutrition, and persistence.



5% of baby boomers would download a health app recommended by their friends



18% would download an app recommended by their family



60% would download an app recommended by their doctor



App Rx Platform

Happtique's mRx Mobile Health Platform allows healthcare professionals to "prescribe" apps to patients with the touch of a button.

Instead of getting a prescription to fill at the pharmacy, the patient receives an e-mail with a secure link to download the prescribed app.



One New App Is Rx Only

WellDoc's latest release is a prescription-only app for diabetes management called BlueStar. It interacts with the user throughout the day, checking in on glucose levels and making real-time suggestions about what to eat or when to retest. It periodically sends patient data to the user's physician via an automatic e-mail or fax.





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A few major national employers – including Ford Motor Co. and RiteAid – have already agreed to reimburse employees who use the app through their prescription benefit plans.

app for diabetes
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or fax.



5.

INNOVATION FROM OUTSIDERS

In Short

The next innovation in healthcare may not come from healthcare at all.

[HXP]

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Shaking Up the Category

Google, Microsoft, Turkcell, AT&T, and others are investing in completely new approaches to diagnostics and care. These outside influencers bring bold new perspectives and high expectations for what healthcare really could and should do.

One of the first movers was mobile phone providers. With their unique access to both people's devices and their data, they've been able to quickly create native health experiences and track which are really changing lives.

Nike and Microsoft have called the next shot, but we're looking to real estate developers, finance, urban planners, and neuroscience for even bigger leaps forward.



Sea of Sameness in Healthcare

One of the biggest barriers to innovation that healthcare faces – particularly in its commercialization engine – is something called “collaborative competition.” Cindy Gallop, former BBH chairman, describes collaborative competition this way: “when everyone in a sector competes with everyone else in the sector by doing exactly the same thing as everyone else in the sector is doing.”

Sound familiar? Think about the last three commercials for prescription drugs you saw. What about the last three public health campaigns to “get people moving”?

There's a certain “sea of sameness” to it all. That's dangerous, Gallop says, because it's “what allows innovation and disruption to come in from the outside.” Said another way, it takes only one brilliantly innovative bullet to take an entire industry down.

Shaking Up the Category

Google, Microsoft, Turkcell, AT&T, and others are approaching these outcomes from different perspectives in healthcare.

One of the providers. People's doctors have been able to experience changing life.

Nike and Microsoft shot, but with developers in neuroscience.



Uh-oh, Here Comes Google

Late last year, Google launched Calico, a new company that will focus on health and well-being, in particular the challenges that come with aging. *Time* magazine reflected, "The search giant is launching a venture to extend the human life span. That would be crazy – if it weren't Google."

This move could be industry-changing, or it could go the way of Google Health. But Google's fountain of youth lab proves two things for sure: Innovation by outsiders will continue to challenge healthcare, and culture can change how people think about problems.

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*In the TED panel
**Every Company Is a
Healthcare Company,**
Jeff DeGraff asked leaders of
the most innovative companies
in the world what disruptive
new ideas for healthcare are
coming from outside*

AT&T

AT&T found that translating medical records into user-friendly technology and applications allows the elderly to better understand their needed course of treatment.

This gives patients the power to participate in their care and produces better outcomes.

Lockheed Martin

Lockheed Martin has invested heavily in on-site counseling and basic healthcare delivery because it found that the on-site services encouraged older male engineers who typically eschew visiting a doctor to get timely advice and treatment.

Location and availability of healthcare had a positive influence on their preventative behavior.

Qualcomm

Qualcomm has developed a way to reliably capture, integrate, and deliver all the device data and databases into one seamless stream of information that can be accessed by the patient and provider on demand.

With this collected and organized personal data, healthcare providers and consumers can sync up their treatment.

6.

THE UNPREPARED PATIENT

In Short

It's a job no one wants and almost no one is prepared for.

[HXP]



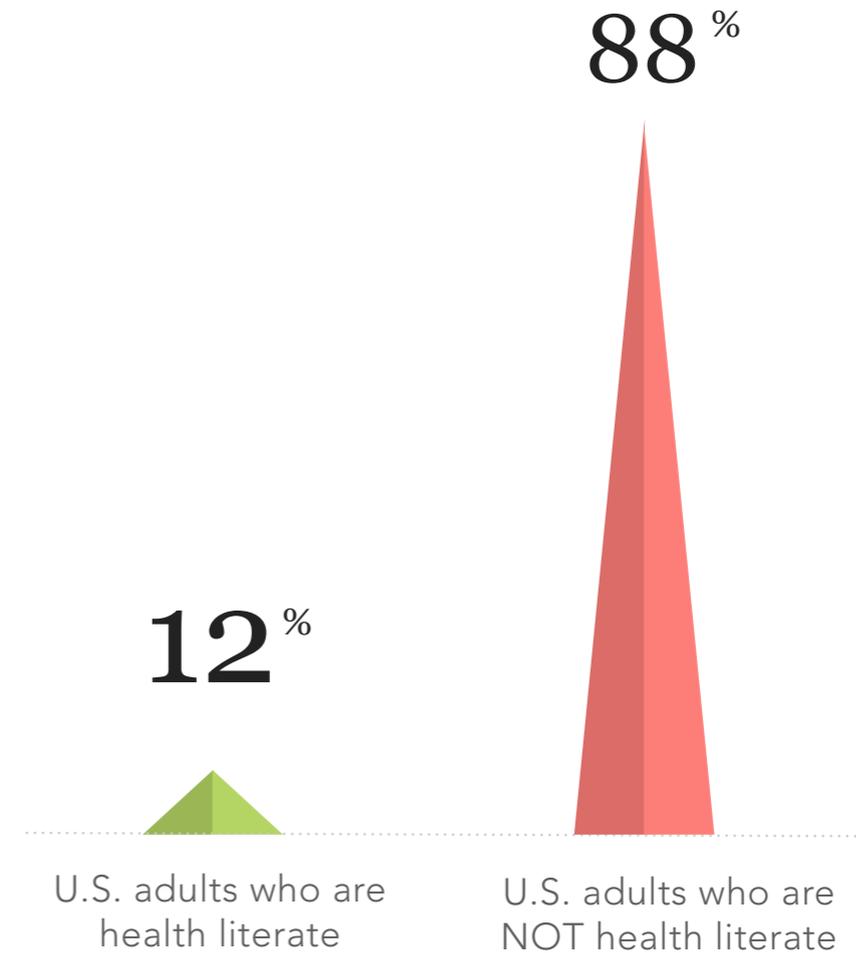
Navigation Nightmare

Let's just start with the big numbers:

Over a third of U.S. adults – 77 million people – would have difficulty with common health tasks, such as following directions on a prescription drug label or adhering to a childhood immunization schedule using a standard chart.

Studies have linked poor health literacy, which disproportionately affects the elderly, the poor, and recent immigrants, to higher rates of hospital readmission, expensive and unnecessary complications, and even death. One study estimated the problem costs the U.S. economy as much as \$238 billion annually.

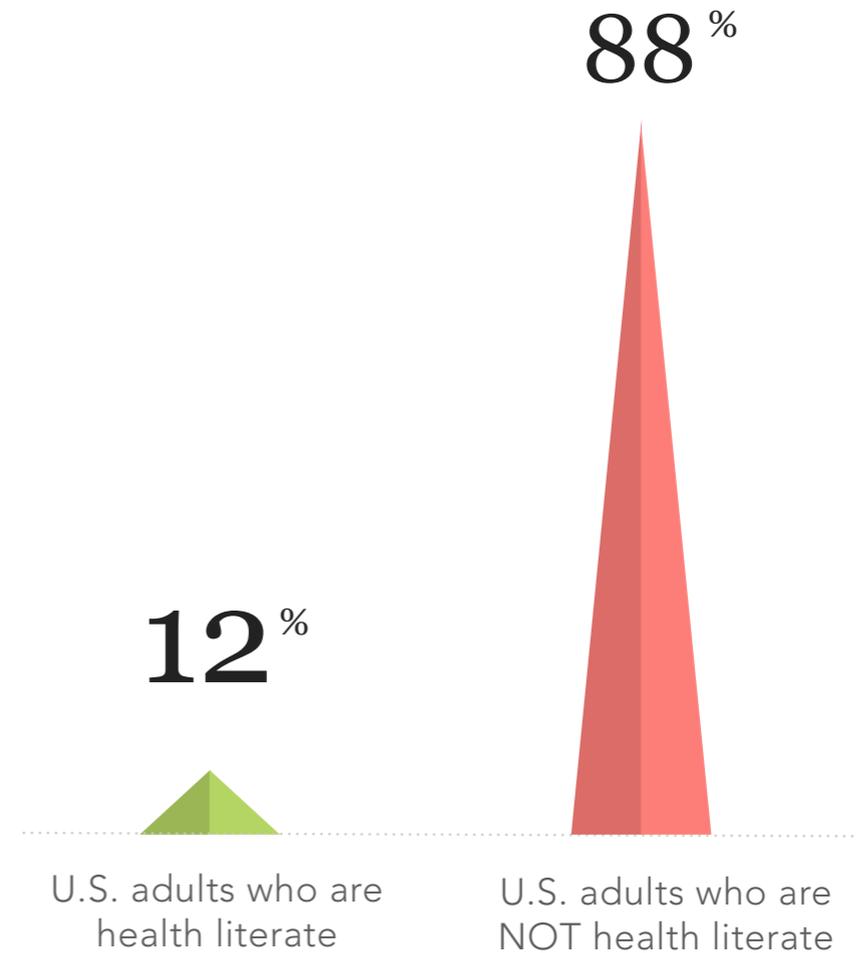
But the problem is even bigger than that. Today, too many patients are entering the world of life-changing care completely unprepared. Many have not had honest conversations with their closest friends and family about their end-of-life wishes.





Dr. Angelo Volandes and Dr. Aretha Davis developed a series of videos that show people what to really expect from both disease and treatment, to help them make more informed decisions about the kind of care they want. They tested the videos with both docs and patients and found huge shifts in the ultimate decisions of both.

Read More >



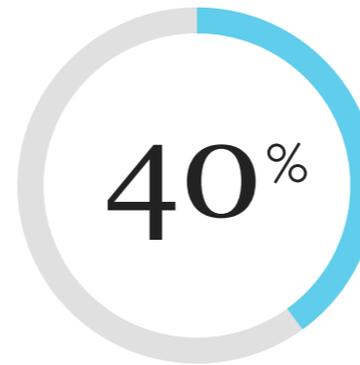
Unprepared Doctors

Patients aren't the only ones confused about the system. Nearly all medical school graduates say they are confident in their clinical training. But, less than half of those graduates feel prepared for the managerial demands of medical practice. The challenges become even greater with more insurance plans, more complex data recording, and new legislation.

Matthew M. Davis, M.D., associate professor of pediatrics and internal medicine at the University of Michigan Medical School, said, "Our patients expect us to understand the system. If we don't, that can result in poor patient care."



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Going It Alone

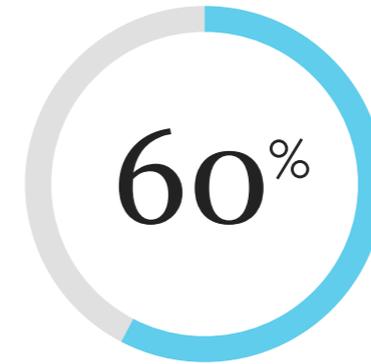
Being alone is an increasingly important dynamic in healthcare. One that – thanks to changes in medical and communications technology, our connections to family, and even the way we work – is becoming increasingly prevalent.

Did you know that married cancer patients live longer than single people who have the disease? It turns out that the support that marriage provides makes a big difference.

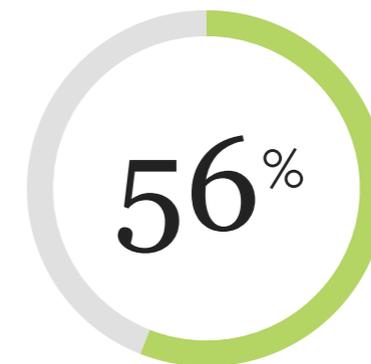
A study published in the *Journal of Clinical Oncology* found that single patients were 53% less likely to receive appropriate therapy than married patients. Help from a spouse made it easier for those patients to regularly take their medications and keep up with chemotherapy and radiation treatments.

Shifting demographics are changing how many people have access to that essential support. From 1950 to 2011, according to calculations by University of Maryland sociologist Philip Cohen, the marriage rate fell from 90 marriages a year per 1000 unmarried women to just 31, a stunning 66% decline.

Although most Americans will be married at some point in their lives, barely half are married right now.



60% of people say that making sure their family is not burdened by tough decisions is “extremely important”



56% have not communicated their end-of-life wishes

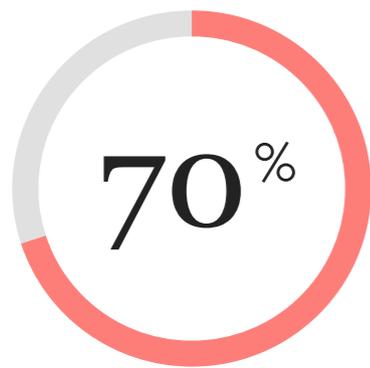
2013 Study

In a 2013 study of patients with lung and head cancer in Australia, researchers found that most could not interpret prescription labels.

Paula Robinson, a patient education manager at the Lehigh Valley Health Network, recounted one case:

A patient who had been prescribed daily insulin shots to control his diabetes diligently practiced injecting the drug into an orange while in the hospital. It was only after he was readmitted with dangerously high blood sugar readings that doctors discovered he was injecting the insulin into an orange, then eating it.

A recent study found that 70% of patients could not interpret prescription labels



It's said that doctors die better than their patients. The biggest challenges to making better decisions are:

Expectations

Knowing that you will do whatever it takes to live and remain with them.

Accuracy

Physicians' prognoses are accurate only 20% of the time.

Knowledge

Physicians have a lot of awareness of what's likely to come.

7.

THE PERFECT PAYER STORM

In Short

In 2014, getting patients access to a needed medication will take more than an Rx.

[HXP]

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3-Year Forecast

The relationship between pharmaceutical innovators and payers has never been more unsettled. Empowered, frustrated payers (including insurers, pharmacy benefits managers, and government agencies) are exerting greater influence and are using all their tools to put new demands on manufacturers and practices.

That's creating an increasingly complex environment for practices to navigate in order to get the right medication to the right patient.

Step (Edit) This Way

Commoditization has been among the top challenges for pharma. Payers simply aren't willing to pay more for a drug that doesn't have substantial clinical benefits.

Instead, they've introduced a number of discounting and substitution policies designed to control costs.

In Germany, for example, the government requires a 16% rebate to public health insurers and instituted a price referencing system tied to low-pricing countries, including Greece. In the U.S., 16 states have imposed monthly drug limits on Medicaid patients.

India has a \$5.4 billion program to provide free generic drugs to patients and requires doctors to select from a generics-only drug list or face punishment for prescribing prescription drugs

Looking for Outcomes

As interested as payers seem to be in reducing costs, their main motivation is really efficiently improving outcomes. It turns out that we humans don't always do what we're told – or even what we agree to. Problems of adherence and compliance are as old as medicine itself, but new research on remote monitoring tools and payer interventions are showing an incredibly efficacious way to help more people be more successful.



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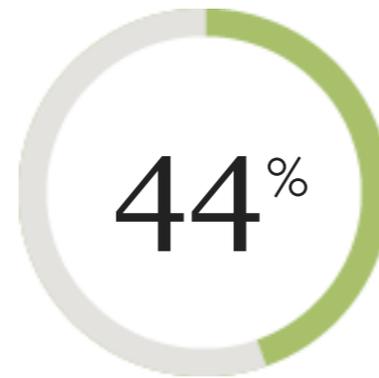
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44% of U.S. practices limit what physicians can write



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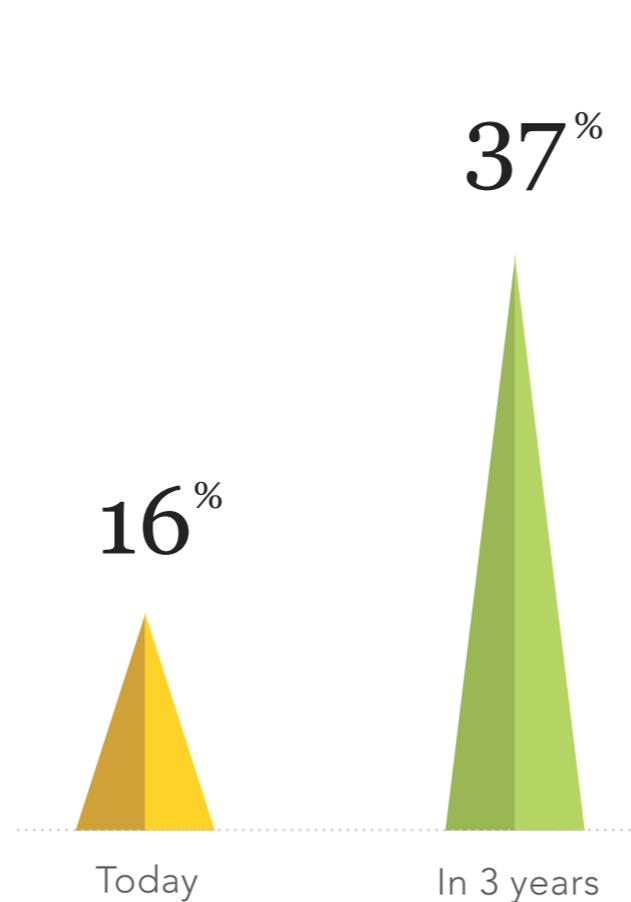
Particularly in commoditized categories, the right support systems will become a critical differentiator for payer and physician alike. In fact, that's becoming the new definition of wrapping value around the pill.

Pharma companies are starting to create new outcome data points for their support programs. They're running mini trials and retrospective studies to demonstrate how their total package – pill + program – uniquely helps patients succeed.

Oh, and they're creating a lot of biologic innovations, too.

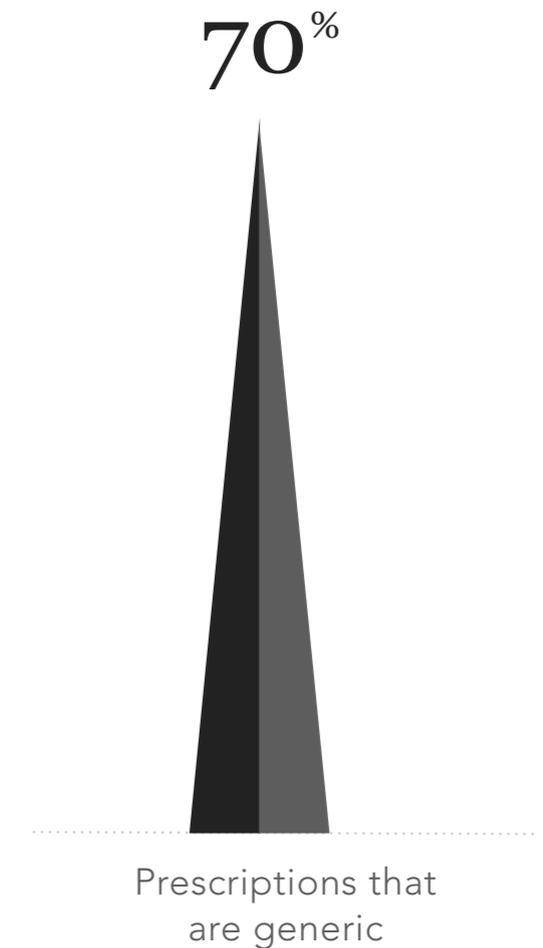
Outcome-based Payment

Only 16% of health plans use this approach today, although 37% expect to support one or more alternative payment models in the next three years.



Generics

70 percent of all prescriptions written today are for generics rather than brand products.



8.

DIGITALLY DEPENDENT CAREGIVERS

In Short

Digital tools help caregivers take care of loved ones and themselves.

[HXP]

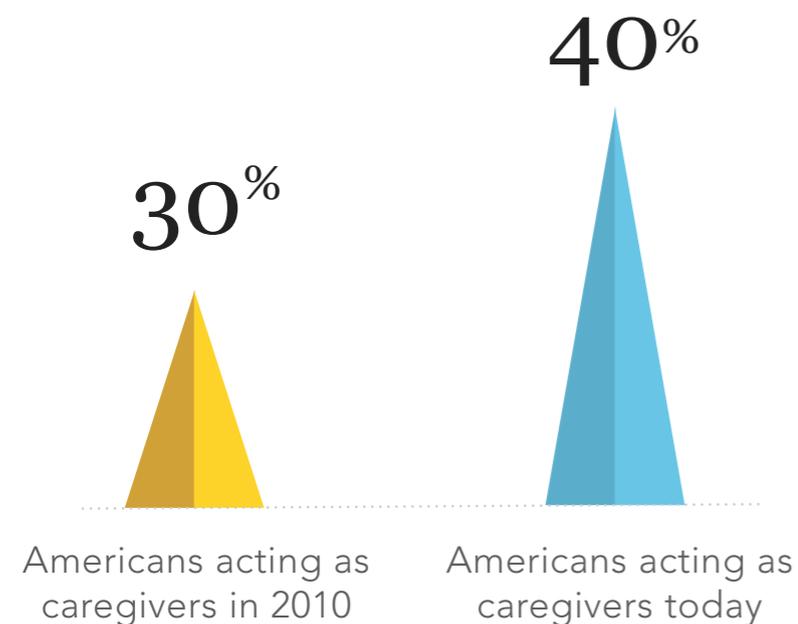
A decorative footer consisting of several overlapping, semi-transparent geometric shapes in shades of purple and grey, creating a modern, abstract design.

A Nation of Caregivers

More and more of us are caring for a loved one with a serious health issue. Pew Research recently reported that almost 40% of Americans are acting as caregivers, up from 30% in 2010.

For most, it's a second or third set of commitments that layer on top of jobs and/or parenting.

Although caring for a loved one is an activity that cuts across most demographic groups, it is especially prevalent among adults ages 30 to 64, a group traditionally still in the workforce.



Active Users of Online Health

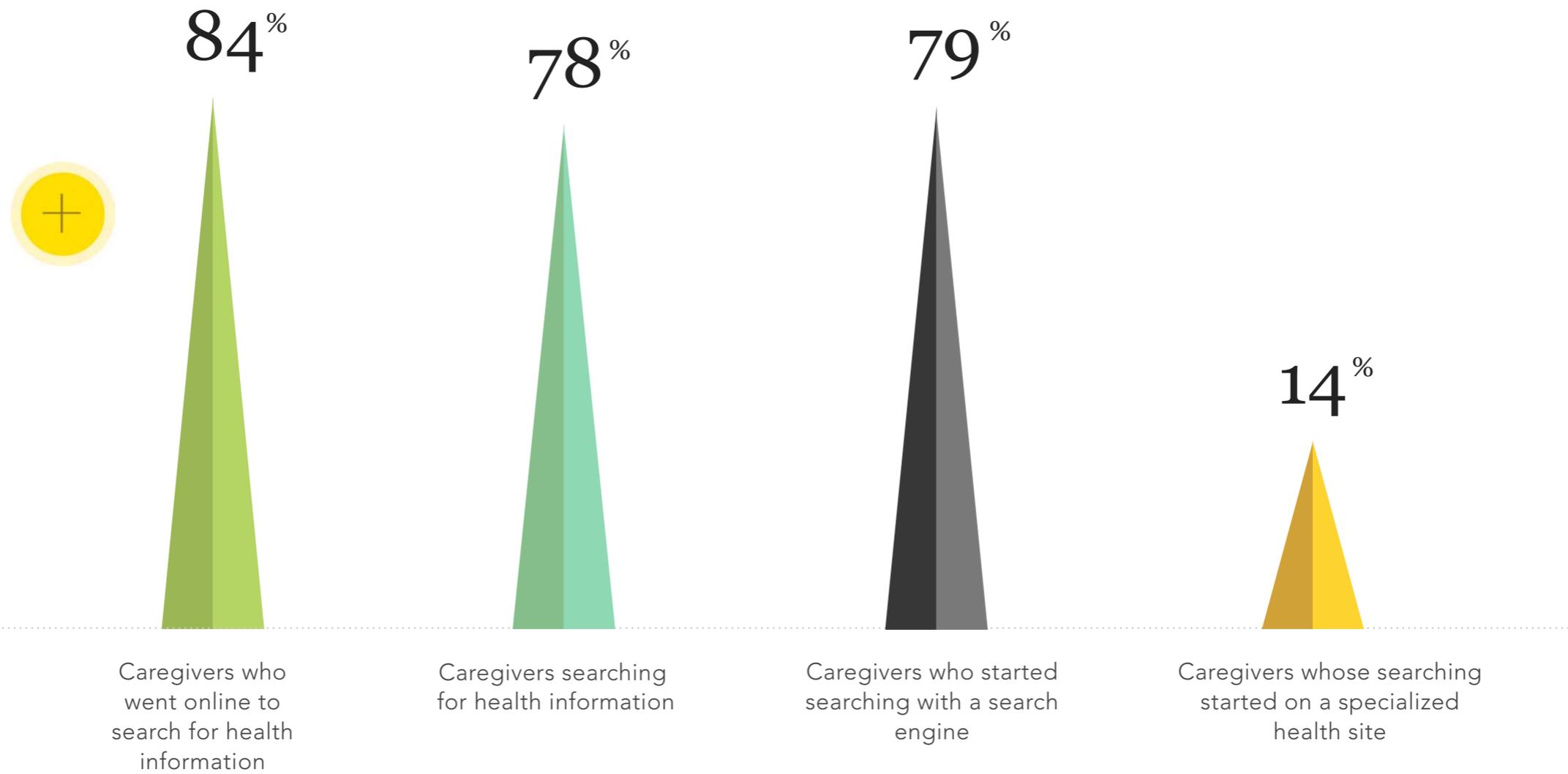
Overall, caregivers are more highly engaged in the pursuit of health information and support, both online and offline, than non-caregivers.

Fully 86% of caregivers have internet access, compared with 78% of non-caregivers. And 84% of caregivers with internet access (vs. 64% of non-caregivers with internet access) say they went online within the past year to research health topics such as medical procedures, health insurance, and drug safety.

Interestingly, almost all those searches – 79% – started at a search engine (Google, Bing, or Yahoo). Only 14% started at a site that specializes in health information, such as WebMD.

Caregivers are more likely than other adults to read someone else's health story, gather health information online, participate in online social activities related to health, go online for a diagnosis, use online drug reviews, and even track their own health indicators.

Active Users of Online Health



Active Users of Online Health



The face of caregiving is changing, too. The Alzheimer's Association found that in some categories more and more caregivers are men. In fact, almost 40% of people who are taking care of someone with Alzheimer's disease or dementia are men, up from 19% just 15 years ago.

Caregivers who went online to search for health information

Caregivers searching for health information

Caregivers who started searching with a search engine

Caregivers whose searching started on a specialized health site

79%

14%

Personal Support, Too

With so many competing priorities in their lives, it may not be a surprise that caregivers are heavy adopters of new digital tools.

87% of caregivers in the United States own a cell phone (over half of those are smartphones).

Of those cell phone owners, 37% say they have used their phone to look for health or medical information online.

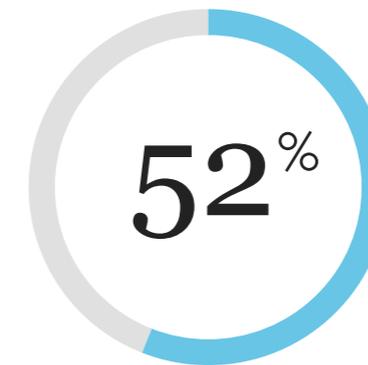
18% of caregivers who manage medications for their loved one use online or mobile tools, such as websites or apps, to do so.

[Read More >](#)

Beyond supporting their loved ones, Boomer caregivers particularly use digital tools to support themselves. A recent study by comScore found that Boomers who are caring for their aging parents rely on sites like Facebook more than their peers. They use social media for 150 minutes per month and view 70% more pages than the average internet user.



59% of caregivers with internet access say that online resources have been helpful to their ability to provide care and support for the person in their care



52% of caregivers with internet access say that online resources have been helpful to their ability to cope with the stress of being a caregiver

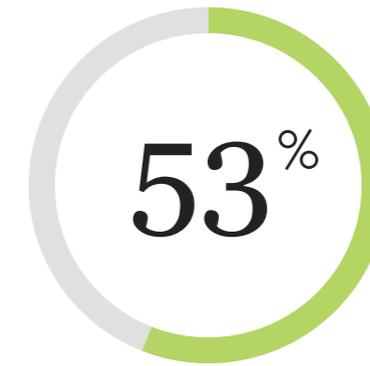
Digital Seniors: Challenging Assumptions About 65+

It's important to note that our caregivers aren't the only ones navigating online health. In fact, even when we focus in on just one historically low-adopting demographic – Americans who are 65+ – we see a huge uplift in the adoption of digital tools. As of April 2012, 53% of Americans ages 65 and older were using the internet or e-mail. Of that number, a full 70% were using those digital tools daily.

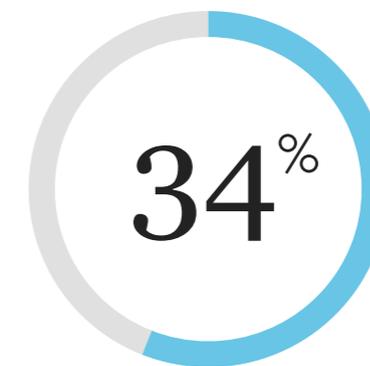
They're also more likely to own a cell phone than you might expect. 69% of adults ages 65 and older report that they have a mobile phone, up from 57% in May 2010. Among those ages 76 and older, 56% report owning a cell phone, up from 47% of this generation in 2010.

Even social adoption is up. According to the same study, 34% of internet users ages 65 and older use social networking sites such as Facebook, and 18% do so on a typical day.

Our opportunity for both caregivers and older health navigators is to help simplify and connect the system so it actually improves their ability to care for a loved one and take care of themselves. For a little inspiration, check out how one powerful brand – AARP – is trying to do just that.



As of April 2012, 53% of Americans ages 65 and older were using the internet or e-mail



34% of Americans 65+ were using social networking sites such as Facebook



To discuss this report live, request another module, or schedule a presentation of trends, please contact Leigh Householder at 614-543-6496 or leigh.householder@gsw-w.com.

Sources

Veterans Administration, CVS, TED, Manhattan Research, Gartner (October 2013), U.S. Department of Health and Human Services, Pew Research, University of Alabama at Birmingham, American Psychological Association, Melon, Mitchell Research and Communications, PwCHealth