

Adapting to changing consumer needs, demands, and expectations

Transformation to **value** and **outcomes-based** health care



Patients and caregivers appear to be demanding change. Dissatisfied with poor service and lack of transparency around **price, quality, and safety**, today's health care consumers are expecting solutions that are **coordinated, convenient, customized, and accessible**.



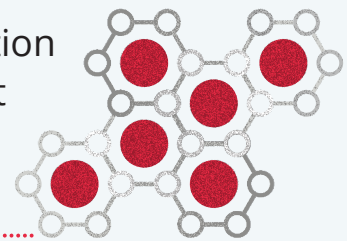
Digital technologies can improve engagement, enable convenience-driven access to care, and nurture a two-way relationship for the long term

Patient engagement strategies—digital health, telehealth, wearable monitoring and fitness devices, online resources, social media

New players in this area—consumer, retail, and technology sectors

There is emerging support for moving away from a reactive approach to chronic care management, in which coordination between stakeholders, therapy, and care is limited or ad hoc, to a proactive model in which engagement tools and support bolster both patients and health care providers

“Nudging”—a change in the way choices are presented or information is framed that alters people's behavior in a predictable way without restricting choices—in increasingly seen as an option to help with patient adherence.



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