The vision for a digital-enabled health care system

Three key trends to watch

cigna healthcare

Table of contents

Introduction

Digital technology is transforming health care while providing patients with convenient and accessible options for managing their health. The scope of digital health is broad and encompasses a vast array of applications and tools, such as mobile health apps, wearable devices, and virtual care.

As people adopt these technologies, the data they generate informs better, more seamless patient experiences, earlier identification of health issues, more individualized care, and improved health outcomes.

With 95% of U.S. adults using the internet, consumers are well prepared to utilize digital-powered health, and many already do. According to the Consumer Electronics Association, 60% of U.S. adults currently or previously used virtual care as part of their health care experience, with 26% having used it within three months of taking the survey. Additionally, 70% of respondents said they were likely to use digital health tools in the future, and at least 3 in 4 believe the tools would help improve their well-being.

70% People who are likely to use digital health tools

3 in 4 Believe the tools would help improve their well-being

Innovation in digital health care is transforming the way health care is delivered and experienced. Today's workforce is more engaged in their health and sees technology as an opportunity to take charge of their well-being. Access to digital health tools is critical to the success of an employee benefits program. By offering a diverse slate of offerings, employers can help employees manage health conditions, find care, and chat virtually with their doctors and other providers.

Let's look at some of the biggest trends and opportunities in digital health and explore how they will reshape and improve the health care experience.

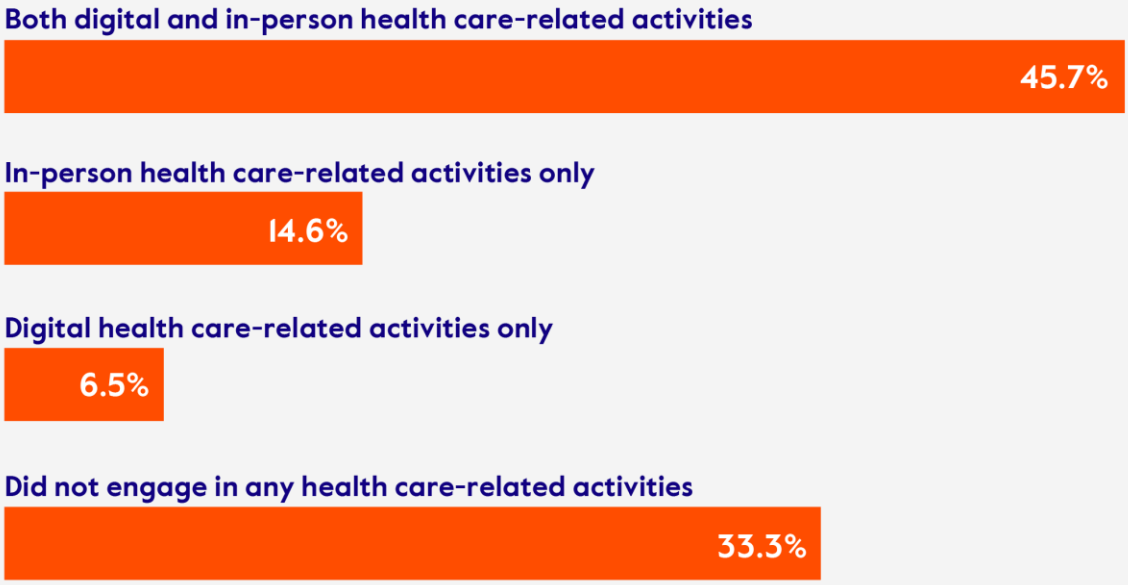
1 The convergence of digital and in-person care

While digital technology will never replace in-person care, different avenues to care can work together to create a more comprehensive and seamless experience for patients. Virtual tools help people more conveniently manage their health consistently, encourage engagement, and complement in-person care. Their digital footprint provides insights from data, which can identify other health concerns that may be at play and inform proactive outreach for the next best action.

Health care providers are embracing digital tools as well. A study by the American Medical Association found that physicians' use of technology for virtual visits has doubled since 2016, with nearly 30% of doctors now utilizing some form of virtual care. The research also shows that doctors' use of other digital health tools is on the rise as well – 58% of doctors enable their patients' access to clinical data, 47% utilize point-of-care or workflow enhancements, and 37% use clinical decision support tools in conjunction with electronic health records (EHRs) or apps that integrate with EHRs to highlight potentially significant changes in patient data, such as weight gain or loss or changes in blood chemistry.

Consumers are embracing digital health tools along with in-person care. According to eMarketer, about 46% of U.S. adults – an estimated 119 million people – use a combination of in-person and digital health resources, including patient portals, virtual appointments, apps, and in-person visits to engage with their health care providers.

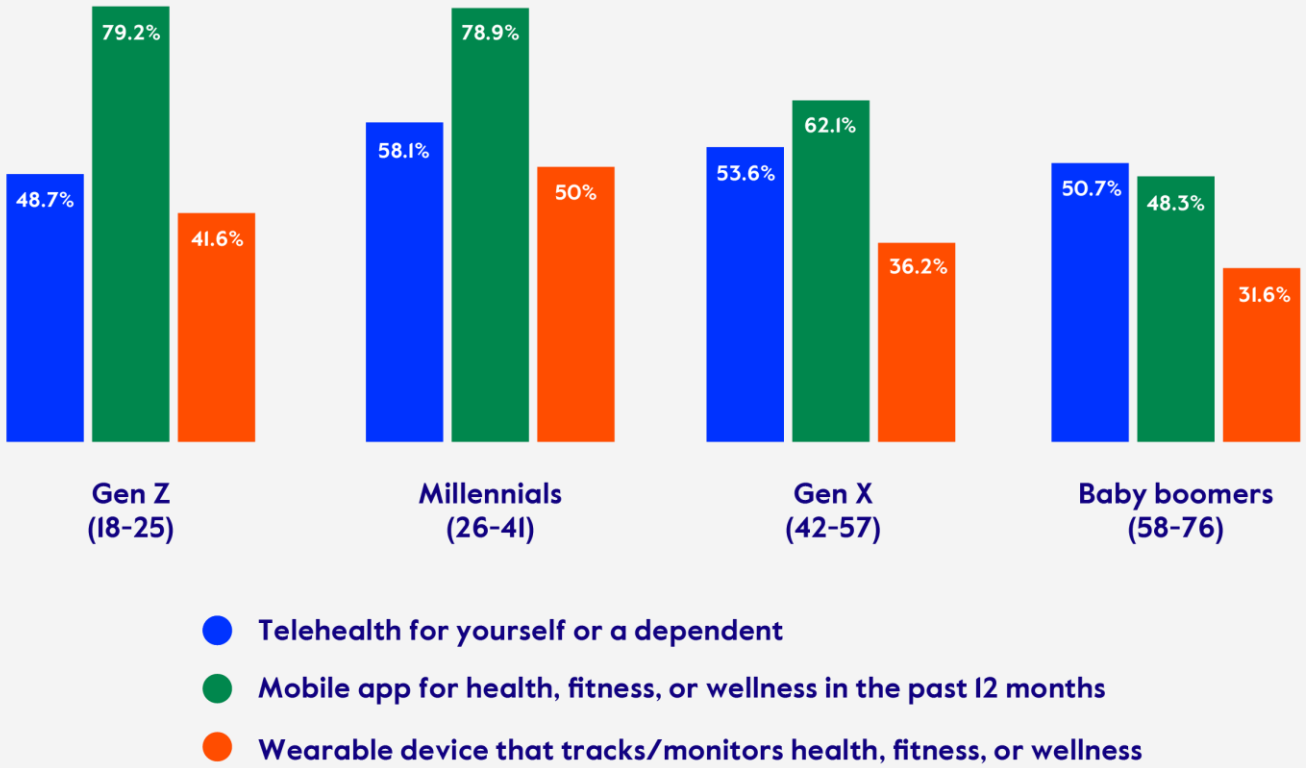
How do U.S. consumers engage in health care-related activities?



Source: eMarketer

The most used digital health tools include virtual care appointments, mobile apps, and wearable devices that track or monitor health, fitness, and wellness. Younger adults (Gen Z and millennials) are most likely to use mobile health apps, while virtual care is utilized fairly equally by adults of all ages. According to research from virtual care provider MD Live, ability to access care anywhere became a more important driver of virtual care usage (up four percentage points from 2022 to 2023). Consumers are especially seeking convenient access to primary care, including wellness screenings and routine care for chronic conditions. MD Live saw triple-digit growth in virtual primary care for the second consecutive year in 2023.[1]

Types of digital health tools used by U.S. digital health users, by generation



Source: eMarketer

Digital technology is making an impact in several areas of health care. For example, digital tools allow health coaching to transcend geography and time constraints, providing personalized guidance to patients at their convenience. While many are familiar with digital coaching's use in behavioral health, it is rapidly becoming an important tool to support people with chronic physical health conditions by keeping them engaged in their care between doctor visits, when their commitment to treatment goals may decline.

Dental care is also benefiting from digital innovation. Today, technology exists that lets patients submit photos of their teeth using a smartphone. The photos are analyzed by artificial intelligence to identify potential issues such as plaque buildup, possible cavities, or tooth damage. Dentists also can review the photos, then set up an appointment to review the results, answer questions, and discuss treatment options.

Remote patient monitoring, another facet of digital health, has become a game-changer in real-time health care delivery and a crucial component in supporting patients living with chronic health conditions.

Remote patient monitoring, another facet of digital health, has become a game-changer in real-time health care delivery and a crucial component in supporting patients living with chronic health conditions. In 2020, 23 million people in the U.S. were using remote patient monitoring devices; by 2025, that number is expect to almost triple, to 70.6 million, which will represent about 26% of the population.

2 Expanding mental health access through digital tools

Digital mental health tools are playing an increasingly important role in expanding access to mental health care. By leveraging digital technologies, providers can reach more patients, including people in remote or underserved areas, and provide the support and resources they need.

Behavioral health care demand is far outpacing supply. Research shows that 6 in 10 psychologists are not accepting new patients, and the national average waiting time for behavioral health services is 48 days. More than half of the U.S. population – 169 million people – live in areas with a shortage of mental health professionals. Those shortages are most acute in rural areas. As a result, rural residents are more likely to receive behavioral health services from their primary care providers.

6 in 10

Psychologists are not accepting new patients

48 days

The national average waiting time for behavioral health services

More than half of the U.S. population live in areas with a shortage of mental health professionals

For marginalized groups (e.g., rural, elderly, people from racial/ethnic minority groups, those with serious mental illness) virtual sessions represent a remarkable stride toward making behavioral health care more accessible and responsive, especially in areas where providers are sparse or in situations that require immediate attention.

According to MD Live, which offers virtual behavioral care appointments, consumer usage of virtual behavioral health for longitudinal care was up six percentage points from 2022 to 2023, and consumer openness to using virtual care for behavioral health is up by 10 percentage points.[2]

Mobile apps and other digital tools allow behavioral health providers to be just a click or tap away from their patients.

According to Global Market Insights, the mental health app market was valued at $6.1 billion in 2023. Estimates say it will increase by 17.9% annually by 2032, reaching $26 billion, fueled by higher mental health needs, increased awareness and acceptance, and a growth in the adoption of virtual therapy.

Measurement-based care, which has become an increasingly central part of the behavioral care conversation, also benefits from data and new technology. For example, the U.S. health care system has become much better at diagnosing and managing autism spectrum disorder (ASD), which affects about 1% of children worldwide.

Applied behavior analysis (ABA) is among the most well-researched and effective interventions that focus on the unique experiences and challenges of people with autism, and data collection is vital to providing quality ABA services.

Some early innovations in this space use video recording systems. With the patient's or caregiver's consent, ABA staff members can record an ABA session. Artificial intelligence analyzes the recording, documents key details, and inputs the data to be analyzed. This gives the therapist more time to focus on the patient's therapy rather than pausing to collect data. It also increases the accuracy and consistency in how data is input.

3 Data, defragmentation, and personalized, connected, and seamless health care experiences

The U.S. health care system is complex. One way to simplify this complexity is by harnessing the power of data and advanced analytics. Data science, predictive modeling, and machine learning have the potential to improve patient health outcomes, reduce costs, and fix a fragmented health care system.

Data has a significant impact on the health care experience by enabling more precise and personalized care. Understanding data from various sources, such as electronic health records, wearable devices, and patient-reported outcomes, can provide a deeper understanding of each patient's unique health needs and preferences. This information can be used to develop personalized treatment plans, monitor patient progress, and adjust care as needed.

Data also plays a crucial role in improving the overall quality of care. By analyzing data on patient outcomes, health care providers can identify areas for improvement and implement changes to enhance the effectiveness of care. Data can also be used to identify trends and patterns in population health, allowing for the development of targeted interventions and prevention strategies.

In addition, data is helping to drive innovation in health care by enabling the development of new technologies and tools. For example, data-driven approaches are being used to develop predictive algorithms and machine learning models that can improve the accuracy of diagnoses and treatment recommendations.

Data, defragmentation, and personalized, connected, and seamless health care experiences

Fragmentation of care is a significant barrier in the health care space, causing gaps in care and making the system more difficult for patients, caregivers and their families to navigate. Regardless of their condition or disease state, patients typically lack a consistent point of contact or individual who helps coordinate treatment, often causing delays in care. Many patients see different providers for different conditions. For example, patients with one or more chronic diseases often need care from a wide range of medical professionals, which can sometimes seem disconnected, such as when patients are getting lab work done, visiting a primary care physician, seeing a specialist, or getting prescriptions filled. A lack of coordination among providers can lead to more frequent hospitalizations and higher costs from the duplication of diagnostic tests, multiple prescriptions, and overlapping care.

Variability in health care compounds this fragmentation – with significant differences and inconsistencies across technologies, access to care, outcomes, affordability, and experiences. In the face of these challenges, however, there are significant opportunities for the health care industry to improve connectivity within the system.

Data and technology will also make the health care system work more effectively. The U.S. health care system has been built around treating those who are already sick – as opposed to addressing the underlying causes of those problems in the first place. Addressing behaviors that contribute to poor or declining health could significantly reduce or eliminate many of the health challenges that our society faces today. Research shows that 90% of health care spending in the U.S. goes toward treating diseases and their complications, while only 2% to 3% goes toward prevention.

90%

Health care spending on treating diseases and their complications

2% - 3%

Health care spending on prevention

Data, defragmentation, and personalized, connected, and seamless health care experiences

Preventive care and treatment will undergo meaningful change, enabled by data and technology, over the next few years. There is a sizable opportunity to harness the power of real-time data and advanced analytics to identify gaps in care, offer more coordinated care and experiences, and proactively empower and encourage patients to get the care and support they need. New technology won't completely replace the existing systems, but it will enable individuals to easily access the right care and will help act as an equalizer. Whole person health is inextricably connected to employee benefits structure, and there is significant value in the integration of medical, pharmacy, and behavioral health benefits and data.

Integration goes well beyond just coordinating or bundling benefits, though. It means understanding patients' needs in real time, providing actionable insights, utilizing proactive and timely patient engagement opportunities, and enabling provider collaboration – all of which result in real impact. A more connected health care experience is fueled by the ability to intervene and impact important health care decisions, without delaying necessary care. This delivers a 360-degree health care approach that focuses on the whole person – with more affordability, predictability, and simplicity.

Integration offers considerable value beyond cost and financial predictability. It allows proactive engagement between plan members and the plan's service teams and clinical teams that see, direct, and refer across all benefits. Integration allows for better collaboration among providers and a simpler experience for patients.

Conclusion

Technology is not overshadowing human care, but rather amplifying and empowering it. Today's digital tools and those on the horizon complement and bolster the clinician's ability to provide nuanced care and extend access to more patients, helping them be actively engaged in their health journey. Virtual and digital care can be particularly impactful for people living with chronic conditions, helping health care providers stay more connected to patients and keeping patients engaged in their health between in-person appointments.

Mobile apps and other digital tools are helping improve access to behavioral health care, while data and technology are changing the game in terms of what's possible from a measurement and early identification standpoint. Technology has become a facilitator that provides a deeper dive into patient care with real-time data, which enables informed, precise, personalized, and seamless care.

Endnotes

[1] 2023 MD Live Attitudes & Usage Study.

[2] 2023 MD Live Attitudes & Usage Study.

This content was created with the assistance of AI tools. It was reviewed, edited, and fact-checked by Cigna's editorial team.