„Population Health Management“
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HIMSS ANALYTICS – WHO WE ARE

• HIMSS Analytics in Europe provides healthcare organisations, governments and industry with extensive data resources and services about the adoption and use of healthcare IT in Europe. HIMSS Analytics’ offerings include database and advisory solutions which encompass market research, IT adoption benchmarking, IT Maturity Models for topics like Electronic Medical Records or Continuity of Care. These offerings are designed to support Management and CIOs, IT Executives and Clinicians from across Europe to compare and measure their progress.

• Service categories:
  o Maturity models
  o Research & Evaluations
  o Market data
METHODOLOGY

• Objectives
  o Evaluation of trends and issues in the European eHealth sector
  o Insights into current and desired states of eHealth in Europe
  o Discussion impulses for the European eHealth community

• Study design
  o Structured qualitative online survey
  o Participation via personal e-mail invitation – European eHealth community
  o Participation via shared public link on several HIMSS media channels

• Survey period
  o October - December 2016

• Target groups
  o Employees in health facilities (e.g. Physicians, CIO’s, CEO’s, Nurses)
  o Employees in the eHealth related academic sector (e.g. Lecturer)
  o Employees in various eHealth related organisations (e.g. Industry representatives)
SURVEY QUESTIONS

Main Topic: „POPULATION HEALTH MANAGEMENT“

1. What type of organisation are you working for?
2. How well are you aware about Population Health Management?
3. Does your organisation employ initiatives or programmes focused on Population Health Management?
   3a. Which of the following initiatives or programmes is your organisation currently focused on for Population Health Management?
   3b. What is the primary driver for pursuing Population Health Management?
   3c. What are the main reasons why your organisation does not have any initiatives or programmes focused on Population Health Management?
4. Does your organisation currently utilise a vendor provided solution to address your population health needs?
   4a. In which of the following areas does your organisation use a vendor provided solution for your population health needs?
5. Does your organisation have products that are specifically focused on Population Health Management?
   5a. What are the main reasons why your organisation does not have any products specifically focused on Population Health Management?
6. Thinking about Population Health Management tools: What would be the most promising tools for increasing the outcome of PHM?
7. How important is Population Health Management for the future success of your organisation?
8. How important is Population Health Management for the future success of a health facility?
9. From a general perspective: How will the environment for eHealth innovation and investment in your country develop over the next 12 months?

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016
High participation from D-A-CH region (Germany, Austria and Switzerland) and the Nordic countries (Denmark, Finland, Norway and Sweden).

„Other“ respondents are from Italy, Belgium, Ireland, Spain, the USA, and Turkey.

Source: HIMSS Analytics; Study “eHealth trend barometer”; Survey period October to December 2016; Total sample: n=358
The majority of participants work in a health facility (57%), e.g. hospitals, community or social care, medical practice etc. 16% work for an IT software vendor and more than a quarter (27%) is employed in “another” type of organisation.

Most survey participants (29.3%) are working as IT professionals, followed by physicians (16.7%) and “other” departments (13.7%). Participants who stated “other departments or activities” work in research, education, consulting, or in the medical devices industry.

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016; Valid cases for type of organisation working for: n=358; Valid cases for job categories: n=300
KEY FINDINGS

**eHealth Business climate:** The business trend for eHealth continues to be positive in all surveyed countries.

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**Lessons for PHM Developers**

**Lesson 1: Awareness about PHM can be further improved.**
Population Health Management (PHM) is not on everybody’s mind. Professionals working for software vendors tend to be more aware about PHM compared to health professionals, i.e. potential users of PHM tools and strategies.

**Lesson 2: Nordic countries are PHM thought leaders within Europe.**
PHM initiatives or programmes have not yet become standard practice in many health facilities. The Nordic countries are ahead of other European regions in that field.

**Lesson 3: PHM offers great potential for healthcare providers as well as software vendors.**

*Healthcare providers:* The primary driver for pursuing PHM are the organisation’s mission and the objective to gain better control of clinical costs, quality and outcomes. The management of chronic diseases is the primary objective by health facilities who already make use of PHM initiatives and programmes. This applies to all surveyed regions.

*Software vendors and consultancies:* Many healthcare providers have plans to invest in PHM initiatives, this is an area set for growth in all surveyed regions. Helping them to identify the right PHM tools and providing support to align PHM with their business strategy and mission (i.e. priority management) will open new business opportunities. Electronic health records and patient registries have been reported to be perceived as crucial tools to improve outcomes and embark on a successful PHM journey.

**Lesson 4: Commercial PHM solutions are not yet widespread.**
The great majority of health facilities do not utilise vendor provided solutions to address their population health needs. However, if organisations use vendor provided solutions for PHM, they primarily do so in terms of business intelligence, analytics and reporting.

**Lesson 5: No future success without PHM.**
PHM is a strategic strategic asset. There’s no way around pursuing Population Health Management. Employees from healthcare providers as well as other eHealth professionals clearly perceive PHM to be important for the future success of their organisations.

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**What is Population Health Management (PHM)?** PHM refers to collection of health related population data from different sources and different facilities, so that health care providers can deduce actions to improve patients’ health and work economically. The aim is to develop differentiated care plans, which are adapted to specific population groups, e.g. according to criteria such as health, age, gender, income, ethnic group, geography, etc. Typically focused on the following areas: identification and support of patients in need, optimisation of therapeutic measures, including their follow-up and actions for healthy living and disease prevention.
RESULTS – AWARENESS

Population Health Management (PHM) is not on everybody’s mind. Professionals working for Software Vendors tend to be more aware about PHM than health professionals, i.e. potential users of PHM tools and strategies.

2. How well are you aware about Population Health Management?

Overall, respondents are moderately aware about Population Health Management (Total mean score = 3).

The awareness depends on the type of organisation as well as their regional location.

Professionals working in a health facility are less aware about PHM than those who are working in IT companies or other organisations.

Regionally, participants from D-A-CH are least aware about PHM. All other surveyed regions are on the same level.

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016; without “Don’t know”; Valid cases for PHM awareness: n=351 (Health facility: n=199; IT software vendor: n=56; Other organisation: n=96; D-A-CH region: n=157; Netherlands: n=36; Nordic countries: n=66; UK: n=46; Other countries: n=46)
3. Does your organisation employ initiatives or programmes focused on Population Health Management?

PHM initiatives or programmes have not yet become standard practice in most surveyed regions. Overall, only 1 in 3 respondents indicate that their organisation has such an initiative or programme in place.

But there are significant regional differences. PHM is much more frequently used by health facilities in the Nordic countries (Yes: 52%) compared to D-A-CH (Yes: 26%) or the UK (Yes: 30%).

D-A-CH also trails (far) behind the other surveyed regions when it comes to future plans for PHM. From those organisations who currently do not employ PHM, only 25% of respondents from D-A-CH indicate that their organisation will do so in the future. This is far more often the case in all other surveyed regions, where 35-53% of respondents indicate to have such plans in their organisation.

These findings are in line with the “PHM awareness” issue shown on the previous slide (e.g. less awareness in D-A-CH).
The management of chronic diseases is the primary objective by organisations who already make use of PHM initiatives and programmes. This applies to all surveyed regions.

3a. Which of the following initiatives or programmes is your organisation currently focused on for Population Health Management?

[only participants who are working in a health facility and where the organisation already employs PHM initiatives or programmes]

<table>
<thead>
<tr>
<th>Initiative / Programme</th>
<th>UK</th>
<th>Netherlands</th>
<th>D-A-CH region</th>
<th>Nordic countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chronic disease management</td>
<td>35%</td>
<td>43%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Preventive health</td>
<td>29%</td>
<td>29%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Participation / Member of a clinically integrated network</td>
<td>12%</td>
<td>21%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Patient centred medical home</td>
<td>24%</td>
<td>7%</td>
<td>16%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016; Multiple answers possible; respondents from health facilities which already employ PHM initiatives or programmes; without "Don’t know"; Valid cases (including "Other" countries): n=121 (D-A-CH region: n=43; Netherlands: n=14; Nordic countries: n=27; UK: n=17)
The key drivers for pursuing Population Health Management are the organisation’s mission and better control of clinical costs, quality and outcomes. Competition does not have a big impact.

3b. What is the primary driver for pursuing Population Health Management?
[only participants who are working in a health facility and where the organisation already employs PHM initiatives or programmes]

The key difference between respondents from different countries/regions is mission vs. efficiency. Especially in the UK the key goal of pursuing PHM is to have better control over clinical costs, quality and outcomes (71%).

It is striking that competition only plays a minor role for using PHM initiatives. Especially in the Nordic countries this does not seem to be a key driver at all (0% make use of PHM primarily because to gain a competitive advantage).

Payment models are no key driver either. Only in the Netherlands and in D-A-CH those considerations play a role.

If we look at both factors together, i.e. payment models and competition, a significant share of respondents from the Netherlands (34%) and D-A-CH (24%) seem to see PHM as an appropriate tool to improve the financial situation and to survive in the market.
RESULTS – INITIATIVES AND PROGRAMMES

Other priorities are the key reason for not pursuing PHM initiatives. Other key reasons are a lack of understanding what PHM actually means and missing decision power. Providing a clear value proposition and an actionable strategy might help to convince late adopters.

3c. What are the main reasons why your organisation does not have initiatives/programmes focused on Population Health Mgmt?
[only participants who are working in a health facility and where their organisation does NOT employ initiatives or programmes focused on PHM and have no plans yet]

- Our organisation is focused on other clinical areas right now: 42%
- Our organisation is relying upon another organisation: 19%
- Difficulty in changing the organisation’s culture: 16%
- Our organisation is unsure where to begin the population health process: 8%
- Population health is too undefined at this point to be a focus: 6%
- Lack of clear evidence that population health management models will succeed: 6%
- Issues with internal systems: 3%
- Potential threat of financial losses by moving to a new payment model: 1%

30% of those who do not use PHM yet might be convinced by a clear value proposition and strategy. They currently feel that “Population health is too undefined...”, there is a “Lack of clear evidence...” or say that “Our organisation is unsure where to begin...”. This group might change their mind if further educated on the subject.

Source: HIMSS Analytics; Study „eHealth trend barometer”; Survey period October to December 2016; Multiple answers possible; respondents employed in a health facility which do NOT employ PHM initiatives or programmes; without “Don’t know”; Valid cases: n=89
RESULTS – VENDOR PROVIDED SOLUTIONS

More than 3 out of 4 of health facilities do not utilise vendor provided solutions to address their population health needs.

4. Does your organisation currently utilise a vendor provided solution to address your population health needs?
   [only participants who are working in a health facility]

Most health facilities do not utilise a vendor provided solution to address their population health needs (78%). This high number might be caused by the lack of software products that focuses on PHM (see slide 16).

Between 33% (UK) to 43% (DACH) of health facilities do neither currently use vendor provided PHM solutions, nor do they have plans for the future. The results are consistent over the different regions.

When it comes to those organisations who currently already use a vendor provided PHM solution the Nordics are on the forefront (27% already use such products, vs. 19% in the UK). Overall the differences between the regions are relatively moderate.

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016; values in %; respondents employed in a health facility; without "Unsure"; Valid cases (including "Other" countries): n=165 (D-A-C-H region: n=81; Netherlands: n=14; Nordic countries: n=22; UK: n=21)
RESULTS – VENDOR PROVIDED SOLUTIONS

Most of the organisations using vendor provided solutions for their population health needs, do so in terms of business intelligence, analytics and reporting.

4a. In which of the following areas does your organisation use a vendor provided solution for your population health needs?

[only participants who are working in a health facility and where their organisation does utilise a vendor provided solution for population health needs]

Effective PHM often begins with segmenting patients based on health-risk status so that physicians can develop care plans reflecting individual needs. But the use of commercial solutions for risk stratification is surprisingly low (8%).

If health facilities utilise vendor provided solutions, it’s most often in terms of Business intelligence, analytics, reporting (23%). This is in line with the main drivers identified for pursuing PHM, i.e. having better control of clinical costs, quality and outcomes (see slide 12).

PHM solutions for care/case management (19%), Data warehousing (19%) or Patient engagement (18%) are equally popular.

The results also show that there is no single type of solution that clearly dominate the field of PHM. There’s a need for various solution types.

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016; Multiple answers possible; respondents employed in a health facility AND use a vendor provided PHM solution; without "Don’t know"; Valid cases: n=83
RESULTS – VENDORS WITH PHM PRODUCTS

Half of the eHealth software vendors surveyed already offer products that are specifically focused on Population Health Management. Another third wants to offer PHM solutions in the future.

5. Does your organisation have products that are specifically focused on Population Health Management?
   [Only participants who are working for an IT software vendor]

52% of surveyed software vendors already offer PHM related products. Another 31% have plans for the future.

Those who do not offer PHM solutions, and have no plans for the future, either work in a different niche of the market or will wait until the PHM market becomes more attractive.

5a. What are the main reasons why your organisation does not have any products specifically focused on Population Health Mgmt?

- Our organisation is focused on other clinical areas right now
- Our market is too small
- Payment models are undefined yet
- Lack of clear evidence that Population Health Management models will succeed
- Population health is too undefined at this point to be focus
RESULTS – MOST PROMISING TOOLS

Electronic health records and patient registries are seen as the most promising tools for increasing the outcome of Population Health Management.

6. Thinking about Population Health Management: What would be the most promising tools for increasing the outcome of PHM?

Electronic Health Records | 33%  
Patient Registries | 29%  
Telehealth / Telemedicine | 19%  
Remote Patient Monitoring | 19%  

Electronic Health Records | 32%  
Patient Registries | 29%  
Telehealth / Telemedicine | 19%  
Remote Patient Monitoring | 20%  

Electronic Health Records | 38%  
Patient Registries | 21%  
Telehealth / Telemedicine | 22%  
Remote Patient Monitoring | 19%  

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016; without “Don’t know”; Valid cases (including “Other” countries): n=697 (D-A-CH region: n=300; Netherlands: n=70; Nordic countries: n=125; UK: n=106)
RESULTS – IMPORTANCE OF PHM

There’s no way around pursuing Population Health Management. It is clearly perceived to be important for future success. Interestingly, this is even more the case for respondents who neither provide care themselves nor sell software tools for PHM.

7./8. How important is Population Health Management for the future success of your organisation?

Participants working in a health facility rate assign a high importance to PHM (mean: 3.6). This is even more remarkable if compared to the low levels of PHM awareness, PHM initiatives or product utilisation.

Health IT software vendors rate PHM importance also high (3.5). The score is even higher (4.1) for those who have own PHM products.

Participants from other organisations ascribe PHM the highest importance for the future success of a health facility (4.3). This might be caused due to being involved in research (academics), strategy development (consultants) or in sensing and describing future directions of the health(care) market (i.e. journalists). It can be seen as an indication that PHM is still in its early stages and for some health professionals (health authorities) more of a hype than lived reality.

Source: HIMSS Analytics; Study „eHealth trend barometer“; Survey period October to December 2016; without “Don’t know”; Valid cases: n=329 (Health facility: n=182; IT software vendor: n=55; Other: n=92)
RESULTS – BUSINESS EXPECTATIONS

Business prospects for the eHealth sector continue to be very positive.

9. From a general perspective: How will the environment for eHealth innovation and investment in your country develop over the next 12 months?

eHealth professionals from the Nordic countries remain the most optimistic ones, followed by their counterparts from the Netherlands. Respondents from the UK and from the DACH region paint the near future of eHealth a bit less colourful, but do still perceive improvements over the next 12 months.

Overall, the business trend for eHealth is steadily positive in all countries since it is measured.
Thank you for your participation!

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