

IDC MarketScape: U.S. Patient Engagement and Enablement Technology 2024–2025 Vendor Assessment

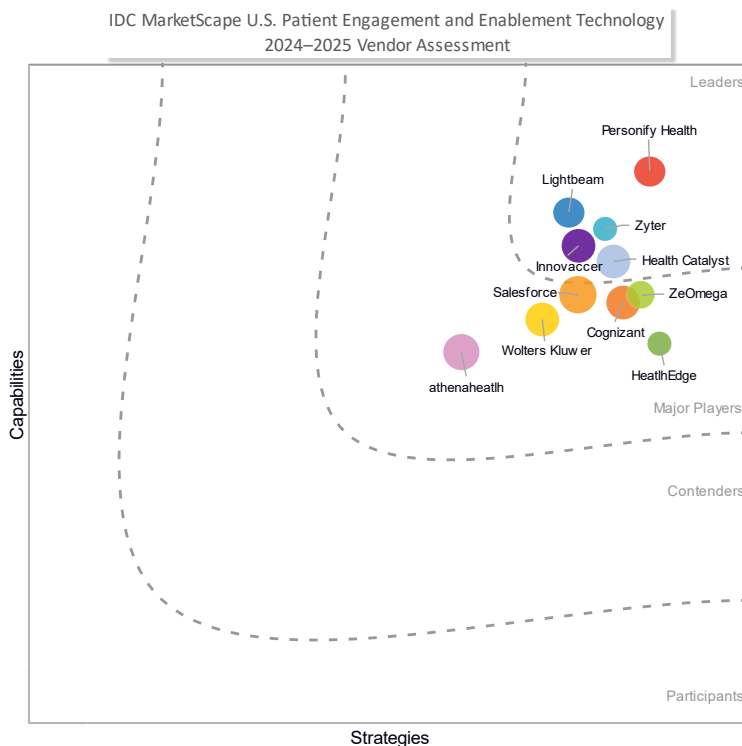
Jennifer Eaton

THIS IDC EXCERPT FEATURES PERSONIFY HEALTH AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: U.S. Patient Engagement and Enablement Technology 2024–2025 Vendor Assessment



Source: IDC, 2024

See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: U.S. Patient Engagement and Enablement Technology 2024–2025 Vendor Assessment (Doc # US52721524).

IDC OPINION

The landscape of patient engagement and enablement technology in the U.S. healthcare market is rapidly evolving. A multitude of tailwinds are driving this transformation, including advancements in digital health tools and a growing emphasis on patient-centered care. Digital health innovations, such as telehealth, remote monitoring, and mobile health apps, are empowering patients to take an active role in their healthcare journey. These tools not only enhance accessibility and convenience but also foster a more personalized and proactive approach to health management. Artificial intelligence and machine learning are at the forefront of transforming patient engagement. These technologies are being used to analyze vast amounts of patient data to provide personalized care recommendations and predictive analytics. Additionally, more recent use cases such as AI-powered chatbots and virtual assistants offer instant responses to patient queries, medication reminders, and appointment scheduling, enhancing patient interaction and satisfaction. Mobile health apps offer features such as medication reminders, symptom tracking, and telehealth consultations. By providing patients with the tools to manage their health on the go, mobile health apps increase convenience and encourage proactive health management, all while optimizing engagement.

Evolving interoperability regulations and data standardization guidelines are also paving the way for more personalized engagement and enablement strategies through the leveraging of data. Data interoperability initiatives such as the Trusted Exchange Framework and Common Agreement (TEFCA) have led to a robustness of longitudinal health records never seen before and the latest challenge of tapping into the wealth of data now at our fingertips. The solution for many is the integration of advanced technologies such as AI, ML, and natural language processing into patient engagement and enablement technology that enables the extraction of meaningful insights from unstructured data sources, enhancing data-driven decision-making and personalized care for each patient.

The Centers for Medicare and Medicaid Services (CMS) Innovation Center 2021 Strategy Refresh: Putting All Patients at the Center of Care is also driving healthcare technology trends with its goal of achieving equitable healthcare outcomes through high-quality, affordable, person-centered care. This strategy refresh is now driving our delivery system toward meaningful transformation, including focusing on equity in everything

we do, paying for healthcare based on value to the patient instead of the volume of services provided, and delivering person-centered care that meets people where they are. Organizations seeking to evolve their approach to patient engagement and enablement should consider the following when assessing technology solutions:

- **Interoperability:** Ensuring seamless data exchange between different systems and platforms remains a significant challenge, and a lack of standardization can hinder effective, scalable, and personalized engagement and enablement efforts.
- **Data security and privacy:** Protecting patient data from breaches and ensuring compliance with regulations such as the Health Insurance Portability and Accountability Act (HIPAA) is crucial, as security concerns hinder the adoption of engagement and enablement technologies.
- **Cost and implementation:** High costs associated with implementing and maintaining engagement and enablement technologies can be a barrier, especially for smaller healthcare organizations.
- **Patient-centric care:** Technologies are increasingly designed to support patient-centric care, with tools that empower patients to manage their health and communicate effectively with their care teams. However, effectiveness is often dependent on the comprehensiveness and timeliness of data sources utilized to support patient-centric care along with the ability to integrate insights into the care team member's workflow while supporting the patient in a timely and satisfactory manner.
- **AI and personalized medicine:** The integration of AI and personalized medicine is expected to further enhance patient engagement and enablement by providing tailored campaigns, interventions, and automated support based on individual patient data. While individualized approaches to engagement and enablement are ideal, organizations must first explore their internal readiness and appetite for AI-supported workflows.
- **Enhanced decision-making:** AI and ML provide healthcare providers and payers with data-driven insights, helping them make more informed decisions about patient care. This includes use cases such as selecting the best treatment options, predicting patient outcomes, and driving interventions in a more timely and effective manner. Additionally, by automating routine tasks and optimizing care process efficiency, these technologies can also reduce administrative burden and associated healthcare costs while promoting an engaged and empowered patient population.

This IDC MarketScape evaluates U.S. patient engagement and enablement solution vendors in terms of strategies and capabilities that support the needs and wants of both providers and payers as well as the consumer-grade experience that patients seek. The key takeaways of this study suggest that:

- Elevated digital patient engagement and personalized experiences are a priority. Healthcare organizations are consistently seeking opportunities to improve patient care and enhance the patient experience. Digital patient engagement road maps and initiatives have gained momentum in recent years to achieve these goals. These road maps and initiatives typically aim to enhance patient engagement by leveraging new digital technologies and touch points through digital front doors, for example. Providing patients with easy access to their health data, health and wellness goals, educational content, referral support, and more empowers patients to play an active role in their overall health and well-being.
- Innovative patient engagement and enablement solutions are dependent on a modern data platform strategy. Technology solution vendors have recognized this and are prioritizing the modernization of their solution architectures by incorporating AI, ML, and advanced predictive analytics and modeling into the technology solution. This supports optimizing the value of the data while simultaneously addressing the need for workflow efficiency and effectiveness. It is important to note that modern IT infrastructure is table stakes for a data-driven environment, making it critical to a successful engagement and enablement solution.
- Advanced data analytics and AI capabilities to support decision-making and streamline workflows are essential. Healthcare organizations are increasingly interested in utilizing advanced data analytics and AI to generate insight, optimize processes, and automate workflows in ways that lead to safer and more personalized care alongside greater operational efficiency. To help healthcare organizations take full advantage of the large amounts of data collected, vendors consistently integrate advanced data analytics and AI into their solution offerings and strategically allocate resources to further enhance these capabilities.
- Improved efficiency and workflow optimization are crucial for adoption. Creating a strategic patient engagement and enablement road map that aligns with both current and future needs is essential for optimizing workflows and promoting long-term success. The road map should aim to improve engagement through individualized interventions and strategies that both empower and enable the patient to become an active participant in their care journey. Consideration should be given to direct patient feedback to ensure that the unique needs of each patient and population are evaluated and incorporated for engagement and enablement success.
- Empowered workforce experience and augmented work capacity are vital for workforce engagement and satisfaction. It is imperative to create efficiency gains that lead to top-of-license work that directly impacts quality of care. R&D investment and strategic innovation plans based on the needs of patients,

providers, and payers can significantly reduce workload burden and improve patient outcomes. A well-designed user interface can reduce the risk of user error and improve overall patient safety, leading to better patient care and improving experiences for all.

- Enhanced quality of care and patient safety is the priority and enterprise objective. Ensuring that the engagement and enablement solution can utilize the extensive data sets exchanged and support various workflows and complex patient populations is vital. By using clean data-powered advanced diagnostics and clinical decision support systems, healthcare providers, patients, and payers can make more informed decisions, leading to better patient outcomes.

The integration of these innovative technologies is transforming patient engagement and enablement in the U.S. healthcare market. By leveraging remote monitoring, AI, patient portals, personalized and data-driven insights, and enhanced interoperability, healthcare providers and payers can offer more accessible, personalized, cost-effective, and efficient care. These advancements not only improve patient outcomes but also foster a more engaged and proactive patient population.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

Most vendors considered for inclusion in this IDC MarketScape offer an enterprise engagement and enablement solution or a specialty niche application for healthcare payers and/or providers. All have the functionality to identify and risk-stratify patients based on clinical and financial data, produce actionable insights that support personalized engagement and enablement activity, optimize data insights into care team workflows, and measure the financial and clinical impact of recommended actions and interventions. There are, of course, vendors that have some capability to enable patient engagement and enablement but do not meet these IDC MarketScape criteria. IDC Health Insights' vendor inclusion criteria for the 2024 IDC MarketScape for U.S. patient engagement and enablement technology vendors include the following:

- The vendor has an established corporate presence (e.g., main/branch office) in the United States that manages and/or supports the sales, delivery, and/or implementation of health IT solution(s).
- Data integration and analytic features that support synthesized and timely patient/member information for the purpose of patient/member engagement and enablement strategies. Features can be sold as a stand-alone product or as part of a suite of product offerings.
- Creation of personalized outreach/communications/campaigns with outcome tracking and analytics capabilities

- The vendor supports patient access to health record information, benefits information, and/or other health and well-being relevant information.
- Communication tools enabling seamless interaction, collaboration, and information-sharing related to engagement and enablement strategies
- Gamified and/or incentivized engagement activities that support health goals, such as annual wellness visit completion, medication adherence, steps, or daily weights
- Educational resources
- Patient/member feedback mechanisms
- Workflows and data-driven actions that promote patient engagement, enablement, and empowerment
- Technology solutions/services must be installed and in production in 5 or more healthcare payer or provider organizations for at least 12 months.

Excluded from the study were vendors that were later discovered not to meet the criteria, those that met the criteria but whose solution did not unequivocally align with IDC's market definition and inclusion criteria as outlined in this study, and those for whom insufficient data existed to produce a well-researched judgment. Vendors who declined to participate could not exclude themselves from the assessment if they met the inclusion criteria and a well-researched judgment about their strategies and capabilities could be reached.

ADVICE FOR TECHNOLOGY BUYERS

U.S. healthcare organization IT buyers can use this IDC MarketScape study to make more informed decisions regarding patient engagement and enablement vendors. The study seeks to assist these organizations in navigating the U.S. engagement and enablement market landscape, assess the solutions the vendors offer, and learn about the strategies and capabilities of each vendor. Ultimately, technology buyers should prioritize solutions that not only address current challenges but also align with the future direction of the industry. This often involves balancing advanced technological features with practical considerations. Specifically, healthcare technology buyers should:

- **Prioritize interoperability:** Ensure that the technology integrates seamlessly with existing systems, such as electronic health records (EHRs) and other health IT platforms. This facilitates smooth data exchange and enhances engagement and enablement capabilities.

- **Focus on user experience:** Seek solutions that are user-friendly for both patients and healthcare end users. Intuitive interfaces and easy navigation can significantly improve adoption, utilization, and engagement.
- **Emphasize data security:** Safeguarding patient data is crucial in the healthcare industry. Select engagement and enablement solutions that comply with frameworks such as HIPAA, the 21st Century Cures Act, and TEFCA to ensure advanced security, compliance, and interoperability.
- **Leverage AI and ML:** Look for technologies that incorporate AI, ML, and predictive analytics to provide personalized engagement recommendations, predictive analytics, and improved decision-making.
- **Enable mobile access:** Select solutions that are accessible via mobile devices to enhance patient engagement and allow for on-the-go health management and care anywhere initiatives.
- **Consider scalability:** Choose technologies that can scale with your organization's growth and adapt to changing needs, ensuring long-term viability and investment protection.
- **Evaluate vendor support:** Assess the level of customer support and training that the vendor provides. Effective support can expedite the implementation process and promote user satisfaction.
- **Incorporate patient feedback:** Select technologies that allow for patient feedback and engagement, helping to tailor services to meet patient needs and improve overall satisfaction. Also seek case studies and testimonials from other healthcare organizations to understand the real-world impact and effectiveness of the technology.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Personify Health

After a close assessment of capabilities and strategic initiatives, IDC has positioned Personify Health in the Leaders category in this 2024 IDC MarketScape for U.S. patient engagement and enablement technology solutions.

In November 2023, Virgin Pulse and HealthComp merged to form Personify Health (www.personifyhealth.com) with headquarters in Providence, Rhode Island. Virgin Pulse has provided well-being services since 2004, while HealthComp supported health

plan administration services since 1994. Today, Personify Health offers a personalized health platform that integrates well-being, navigation, advocacy, and health plan administration for 7,500 companies, including employers as a primary customer base, health plans, health systems, and brokers.

Personify Health's platform unifies various programs, vendors, and resources into a single experience, with integration facilitated through the Partner Integration Framework, which supports direct links, single sign-on, secure file sharing, and APIs. Some examples of ecosystem integration are apps associated with mental health; family and caregiver support financial well-being; and disease-specific entities, such as musculoskeletal health.

Personify Health's platform also combines AI and machine learning to provide personalized health recommendations and drive member engagement. The platform's AI-driven recommendation algorithms, which act as "content recommenders," personalize the member experience by suggesting relevant health journeys, habits, and programs based on individual data. The platform's AI engine continuously learns from member interactions to provide increasingly meaningful recommendations, and monitoring of engagement rates and positive health outcomes demonstrates the effectiveness of these recommendations.

Personify Health's platform also includes a suite of predictive models to identify member risk, care gaps, and behavior related to healthcare conditions and utilization. These models help recommend relevant programs, promote care management and advocacy, and initiate clinical interventions with high-risk populations that require enhanced support. The platform's AI chatbot and live agent features optimize member services by assisting with health-related inquiries. The platform's mobile app and activity-tracking devices further support engagement by providing convenient access to health resources and real-time connection with subject matter experts.

The company employs a diverse team of healthcare professionals, including physicians, nurses, dietitians, and health coaches. Personify Health's strategic road map focuses on enriching the customer and member experience, elevating healthcare access, enhancing member value and engagement, and delivering strong return and value of investment. Planned enhancements include a unified app that connects all solutions, expanded APIs and new self-service tools, unified coaching and clinical services, proactive outreach, tiered network plan designs with a targeted rewards system, and new reporting and benchmarking options. Personify Health offers flexible pricing models, including per employee per month or year, per participant (case rate), and fixed fees, along with performance guarantees to clients.

Strengths

- The platform leverages comprehensive patient or member data-driven profiles and AI and machine learning to provide personalized health recommendations

while also supporting outcome data to provide transparency on related outcomes.

- Personify Health stands out for its ability to unify various health programs and resources into a single, comprehensive, and engaging platform.
- Personify Health's platform is based on behavior change economics, which promotes long-term engagement and habit formation. The company also utilizes game mechanics and rewards to motivate members and encourage sustained engagement.

Challenges

The recently launched, combined entity of Personify Health aims to address a wider range of patient/member experience initiatives by leveraging its roots in engagement improvement. Personify Health should continue to focus on its core segments of holistic well-being, effective navigation, and flexible health plan administration to gain traction and experience within the diverse needs, motivators, and metrics of success for these similar but unique areas of service.

Consider Personify Health When

Employers, providers, and payers should consider Personify Health when seeking a comprehensive, integrated platform supporting personalized engagement and long-term behavior modification through robust data sets and AI technology.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores and, ultimately, vendor positions on the IDC MarketScape on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

In this IDC MarketScape, IDC Health Insights evaluates vendors supplying healthcare organizations with patient and/or member engagement and enablement solutions. IDC Health Insights defines engagement and enablement solutions as “applications and solutions designed to facilitate active involvement of patients in their healthcare journey.” These tools aim to improve patient outcomes, enhance experiences, and streamline effective healthcare delivery by fostering optimized collaboration between patients, providers, and payers.

The engagement and enablement technology market in the United States is rapidly evolving, driven by an increase in healthcare consumerism coupled with the demand for efficient and cost-effective healthcare delivery. As the industry moves toward outcomes-based care models, which emphasize patient outcomes and cost-efficiency, the demand for effective engagement and enablement solutions has surged. These technologies are essential for managing complex patient populations, improving resource utilization, promoting preventative care, ensuring patient engagement and empowerment, and improving the overall quality of care for all.

LEARN MORE

Related Research

- *IDC MarketScape: U.S. Care Coordination Technology 2024–2025 Vendor Assessment* (IDC #US52720924, December 2024)
- *IDC FutureScape: Worldwide Healthcare Industry 2025 Predictions* (IDC #US52217524, October 2024)

- *IDC Worldwide Digital Transformation Use Case Taxonomy, 2024: Value-Based Healthcare* (IDC #US52537424, September 2024)
- *IDC Market Glance: Value-Based Health Services, 2Q24* (IDC #US52347424, June 2024)
- *IDC Market Glance: Social Determinants of Health, 2Q24* (IDC #US52338823, June 2024)
- *Generative AI Use Case Taxonomy, 2024: The Healthcare Industry* (IDC #US52327024, June 2024)
- *IDC PlanScape: GenAI in the Life Science and Healthcare Industries* (IDC #US51936724, March 2024)
- *IDC Market Glance: Healthcare Ecosystem, 4Q23* (IDC #US51436222, December 2023)
- *Generative AI Trends for Healthcare: Insights from the GenAI ARC Survey, 2023* (IDC #US51408023, November 2023)

Synopsis

This IDC study details the landscape of patient engagement and enablement technology in the U.S. healthcare market that is rapidly evolving. Advancements in digital health tools and a growing emphasis on patient-centered care are driving this transformation. Digital health innovations, such as telehealth, remote monitoring, and mobile health apps, are empowering patients to take an active role in their healthcare journey. These tools not only enhance accessibility and convenience but also foster a more personalized and proactive approach to health management. As technology continues to advance, the focus on patient engagement is set to revolutionize the way healthcare is delivered and experienced.

“U.S. healthcare organizations can no longer think of patient engagement and enablement strategies as siloed, one-size-fits-most approaches aimed at marketing and brand loyalty goals. Furthermore, engagement and enablement initiatives should not start and stop based on care encounters, benefit enrollment, or other periodic episodes but instead be continuous. Patients need, deserve, and want more. It’s time for healthcare to embrace the concept of proactive, data-driven, personalized engagement and enablement strategies that support whole-person care,” states Jennifer Eaton, research director, IDC Health Insights.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

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