



300,000+
digital health-related
applications on
today's market

The digital revolution is reshaping health care at an ever-accelerating rate — changing how people take care of themselves, how health care providers care for patients and how the health care benefits industry is managed. The global digital health market is projected to reach \$380 billion by 2024, growing 26% annually.¹

As more U.S. consumers and health care providers demand and adopt these technologies, health benefits leaders increasingly are challenged with not *whether*, but instead *where*, to invest in digital health.

Currently, there are more than 300,000 digital health-related applications and 340 consumer wearable devices on the market worldwide. With another 200 health apps added to the top app stores each day, digital health's innovation continues to accelerate.² The promise and potential is exciting, but also overwhelming.

“Much of this technology is still emerging,” said Mark Bini, vice president for innovation and member experience at Express Scripts, “and there are many digital health solutions that require clinical review and validation.”

The digital health revolution is here. As a health care benefits leader, how are you shaping your digital health strategy, investments and programs?

Here are five critical factors to consider.

“By providing a uniform review process with the expertise and focus behind it, we can ensure a digital health therapy’s safety, quality, usability and affordability.”



Mark Bini,
Vice President,
Innovation and
Member Experience

FACTOR 1 | BANDWIDTH OR BURDEN?

There’s *not* an app for that.

Bandwidth is not just a buzzword in today’s digital and business world; it’s a reality. At a time when nearly every organization is being tasked with doing more with less, it shouldn’t come as a surprise that many organizations — from companies large and small to federal agencies and even health plans — are struggling to secure the resources required to build a digital health initiative from scratch.

The investment of resources is compounded by the pace at which these solutions are coming to market. As digital health solutions emerge, the level of effort involved in procuring solutions, negotiating with vendors, administering contracts, targeting messages, engaging members and reporting on outcomes is monumental.

“We have heard from many of our clients that they simply do not have the resources or capacity to take on the breadth of responsibilities required to confidently deploy — and continuously manage — a digital health initiative,” Bini said. “Like medications, by providing a uniform review process with the expertise and focus behind it, we can ensure a digital health therapy’s safety, quality, usability and affordability.”

FACTOR 2 | CLINICAL EXPERTISE

Is there a doctor in the house?

Although a variety of industry and policy initiatives have emerged for digital health tools, no single, clinically focused governing body with the experience and resources to vet these offerings exists across the apps, wearable devices and therapeutics available today.

To truly impact and transform health care, digital health solutions require the standards and evidence that physicians, hospitals, insurance plans and patients seek.

Digital health solutions’ efficacy and assurance comes from quality studies of designated populations using clear-cut study design in real

clinical environments with meaningful metrics of impact — health outcomes, cost and access to care.³

When it comes to your digital health strategy, your organization's reputation and the safety, health and wellness of your members depends on how well your selections perform across four domains: technical, clinical, usability and cost. As you consider solutions, how confidently can you answer questions like these?



**No single, clinically
focused governing
body for digital
health offerings
exists today**

Is the digital health solution's technology and design accurate and reliable? Will it yield appropriate data consistently? What evidence is there to support this?

Has the therapy or therapies that this digital solution supports been demonstrated as clinically safe and effective? To what extent has it been studied and measured to prove its claims?

Is the solution easy to implement, convenient to use and able to sustain engagement over time to achieve the desired therapeutic effect?

Does the digital health solution provide secure and confidential updates and outcomes to individuals, caregivers and health care providers?

Will this solution be cost-effective, scalable and ultimately reimbursable?

The assessment, selection and offering of appropriate digital health solutions requires intensive clinical review and critical, objective validation.

“By creating a level playing field for inventors and entrepreneurs to encourage continued innovation in this space, we can also provide a pathway to deliver those innovations safely, accurately and affordably for our clients and ultimately those individuals we serve.” Bini said.

28%

of digital health participants have less than two years of digital health industry experience

FACTOR 3 | MODEL BEHAVIOR

Fragmented or focused health care?

Digital health is a booming business, continuing to attract newcomers with little health care experience from a variety of industries beyond health care.

In fact, 28% of digital health participants consisting of IT/tech companies, market research/consulting companies and app developers/agencies have less than two years of digital health industry experience.⁴

In addition to a lack of health care experience, without formal industry oversight, some commercial app developers participating in the digital health market may also collect and sell data to other organizations, target ads and otherwise compromise users' privacy.

Whether it be inexperience, less-than-altruistic motives or overlapping objectives, the sheer volume and variety of digital health industry participants can create fragmentation among digital health offerings, as each focuses on their own intended purposes, stakeholders or return on investments.

As you consider digital health solutions, be sure to focus on those vendors and applications that align with your existing — and future-state — health care model.

While a particular digital health solution may solve a short-term need, it's important to keep the end state in mind. Without consideration of a long-term impact, a short-term lens could lead to unnecessary complexity, potential duplication or fragmentation.

FACTOR 4 | DATA AND PRIVACY

Hip with HIPAA?

A recent study found that a whopping 80% of the most popular health applications do not comply with standards intended to prevent misusing and disseminating users' data.⁵

Though promising developments are underway — including growing oversight of developer technology — health care providers, payers and patients do not have sufficient guidance to help them select effective products that meet specific requirements, and best integrate into a particular health care context.⁶

80%

of today's most popular health applications are putting users' personal data at risk

With an influx of digital health applications and devices entering the market daily, the need for standardized, objective, rigorous and transparent validation becomes more urgent to develop a successful and sustainable digital health strategy and ensure privacy, security, safety and performance.

“Ensuring the security and privacy of personal health care data is absolutely crucial,” stressed Bini. “In addition to therapeutic value, effective usability and cost effectiveness, another critical determinant of the viability of a particular digital health solution is its stringent security and privacy standards.”

46%
of consumers
stopped using
health care related
apps because of
costs, privacy
concerns or
loss of interest.

FACTOR 5 | SOLUTIONS AT SCALE

Targeting, Deploying, Engaging and Reporting

Existing digital health products hold the potential to save \$46 billion in U.S. health care spending — if they're deployed comprehensively.⁷

However, simply downloading an app on a phone, for instance, can't change the future health of patient populations or an organization's bottom line.

Despite digital health apps' benefits, a recent survey finds that while many consumers download health care related apps, 46% have stopped using them because of costs, privacy concerns or waning interest.⁸

Introducing, educating, motivating and sustaining the interest of both providers and patients requires strategic, programmatic targeting, re-targeting, engagement and gamification techniques to continue to drive adoption, usage and ultimately, a change in behaviors.

In addition to validating digital health effectiveness, ensuring the appropriate application is targeted, deployed with support of health care providers, and reported on, are equally, if not more, important. Once established as a viable offering, creating programs that include digital health solutions that will engage users over the long-term and motivate measurable change becomes the challenge.

Digital health care
is complex.
We keep it simple.

Visit our [website](#) to
learn more.

With this complexity, we're focused on keeping it simple.

Digital health brings with it the prospect of lower health care costs and a more efficient and effective health care landscape for all.

However, the market is complex and there are significant resources required to build a successful digital health strategy. We know organizations are overwhelmed with how to get started.

To make it simpler for plan sponsors to navigate the enormous amount of currently available personal health technologies and interventions, Express Scripts has introduced the industry's first Digital Health Formulary.

"In addition to helping manage currently available digital health solutions," concluded Bini. "Our Digital Health Formulary lays the groundwork to manage new solutions and tools that have yet to be invented."

To learn more about our Digital Health Formulary, visit our [website](#).

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