

30 Jan. 2008

Did You Know?

Health information seekers prefer the Web to any other single channel for accessing health content.

Where Can You Find Us?

Liz Boehm will present the teleconference "[Employers' Disease And Wellness Management Plans](#)" on February 6 at 1:00 p.m. Eastern time.

Carl Doty will be at [HIMSS08](#) in Orlando, Fla., February 24-28. Although not speaking, he'll be making the rounds to see what's new and interesting.

Liz Boehm will also be an instructor at Forrester's "[Web Site Brand Review](#)" workshop in San Francisco, Calif. on February 27-28.

Julie Snyder will speak at the [2008 Benefits & Health Care New York](#) show and conference in New York City on March 3.

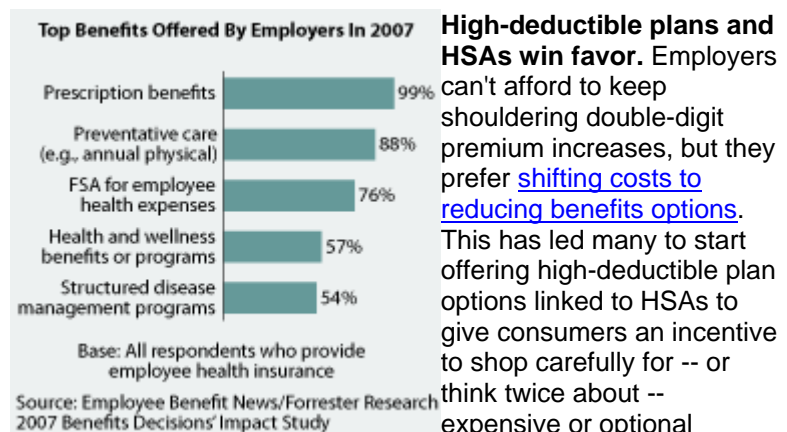
Carl Doty will also speak at [CDHC Expo](#), March 3-5 in Las Vegas, Nev.

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First Look At Shifting Healthcare Priorities

Whether you're a Republican or a Democrat, you can't help but notice that the presidential candidates' speeches are full of head shaking and lamentations about the state of the US healthcare industry. Although the government and politicians play a huge role in the healthcare industry, employers still collectively pick up the largest tab for American's health expenditures. The candidates may all have a program for "fixing" healthcare, but employers still [don't know what the solution should be](#). Still, they're [continuing to offer core benefits](#) and shifting some priorities to try to keep costs in check.



High-deductible plans and HSAs win favor.

Employers can't afford to keep shouldering double-digit premium increases, but they prefer [shifting costs to reducing benefits options](#). This has led many to start offering high-deductible plan options linked to HSAs to give consumers an incentive to shop carefully for -- or think twice about -- expensive or optional services. For the moment,

the high hopes for these consumer-directed health (CDH) plans are dashed by the fact that [consumers have concerns about their complexity](#) -- if they've heard of them at all. Still, CDH is [driving some interesting alliances](#) on the administrative side of the house, and causing claims platform vendors to make adjustments to their core claims management offerings.

For a detailed look at leading claims platform vendors' ability to support CDH and other key capabilities, check out the "[Forrester Wave™: Healthcare Claims Platforms, Q1 2008](#)" report.

Employers turn to disease management (DM) and PHRs.

If you give consumers more long-term financial skin in the game, it's only fair to give them tools and resources to help them keep their health under control -- both before and after they get sick. Employers believe that disease and wellness management programs are their surest routes to healthcare cost savings -- although they still want [more proof that their DM investments are](#)

Health Information Seekers Choose Web Sites Over Other Content Sources



Base: US health information seekers
Source: North American Technographics®
Technology, Media, And Marketing
Benchmark Survey, Q3 2007

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[paying off](#). And they want all employees to take a more active role in their health, prompting them to ask their health plans to provide personal health records (PHRs) that take a 360 degree view of the individual's health status. And health plans are complying, adding PHRs to their arsenal of interactive health tools. Unfortunately, I think that [the road to PHR success will be a long one](#).

The individual market gains momentum. We at Forrester have been watching the Massachusetts foray into universal coverage with interest. Friends and acquaintances affected by the new policy may gripe about the costs, but they're also grateful for the coverage. We're not audacious enough to predict the outcome of the presidential races, but we did venture to calculate that the uninsured represent [a \\$115 billion untapped revenue opportunity](#) for health plans. Whichever version of healthcare reform gets voted into office in September, however, take heed. As Dr. Joseph Kvedar of Partners Healthcare reminded me at lunch the other day, access is only one battle in the war. If any of the candidates takes on quality and cost, they'll get my vote!

We'll continue to track the evolving landscape of healthcare and aging. In the meantime, we welcome your input and questions in the form of inquiries, briefings, and plain old gossip. Here's to your health!

Regards,
Liz Boehm
Principal Analyst

Research Referenced In This Issue

- [Are Employer-Sponsored Health Benefits Eroding?](#) (44378)
- [CDHP Product Managers: Re-Examine Your Platform Options](#) (44098)
- [Employers Expand Key Healthcare Products](#) (43979)
- [Healthcare Consumers Continue To Migrate Online](#) (44297)
- [Healthcare Reform: An Uphill Battle For Consensus](#) (43983)
- [How Employers Measure Disease Management](#) (44341)
- [Low Awareness Means Missed Opportunities For High-Deductible Health Plans](#) (43530)
- [PHRs: From Evolution To Revolution](#) (43653)
- [The \\$115 Billion Individual Health Insurance Opportunity](#) (43626)
- [The Forrester Wave™: Healthcare Claims Platforms, Q1 2008](#) (44337)