Tech-enabled care

Creating new opportunities for patient
connection and delivering care

Walgreens

Technology is changing the future of care

Defining tech-enabled care and what that means for the industry

Tech-enabled care—the technology-based solutions that improve care in our homes and communities—allows healthcare professionals to fill gaps in care and connect with patients in entirely new ways. Through tech-enabled care, routine health management becomes easier for patients and their caregivers. Whether it's telehealth services or apps or physical devices such as monitors and wearables, tech-enabled care is expanding nontraditional avenues to care that make the patient experience more convenient, accessible and affordable. As a result, patient expectations are increasing as they better hone in on the ways they prefer to access and manage their healthcare needs.

75% **of those age 70 and older** have used the internet to research their condition, more than half have used online appointment scheduling or patient portal, and 40% have used telehealth.[1]

Changing expectations

Technology at their fingertips

Now more than ever, patients, their caregivers and providers seek out new tools that can help improve the patient experience and their health outcomes. These digital tools have opened new ways of connecting patients to care, empowering them to communicate with healthcare experts, track vitals, get pill reminders and even refill prescriptions. In many ways, some aspects of receiving healthcare have been placed right in the hands of the patient.

Who benefits from tech-enabled care?

Rural and aging populations stand to gain great benefits from tech-enabled care, and it is especially beneficial for caregivers because it gives them more tools to save time, access and coordinate care for loved ones, save trips to provider offices, and so much more.

- **30% of U.S. adults** use wearable healthcare devices.[2]
- **Nearly half** of those users (47.33%) use wearable devices every day, with a majority (82.38% weighted) willing to share the health data from wearables with their care providers.[2]

55%

of caregivers compared to 36% of consumers who are on medication for a chronic condition use the internet to research health services, providers and conditions.[1]

$21.6 billion

was invested in digital health companies in 2020— more than double the investments made in the prior year, and almost four times the amount invested in 2016.[3]

Advancing care

The adoption of technology can augment the efforts of providers and caregivers

By automating time-intensive tasks and reducing the need for patients to physically visit their providers to ask questions and receive care, managing healthcare has become easier and more convenient. Tech-enabled care has allowed patients to get better access, be more engaged and stay healthier longer.

Providers have access to more sources of data that can be used to stay connected with patients in new ways, enabling them to more closely monitor patients' healthcare journeys, make insightful decisions and improve their patients' treatment plans. Transparency and insight into a patient's health offers visibility and gives patients and caregivers peace of mind.

Through a long-term lens, innovations will continue to make it easier for patients to receive healthcare from home, reducing the need for costly hospital visits and prolonging the ability to age in place comfortably.

The care gap crisis

Today, more than 46 million adults age 65 and older live in the U.S.[4]; by 2050, that number is expected to grow to almost 90 million.[5] At the same time, the number of physicians is decreasing. More than 40% of active physicians in the U.S. will be 65 or older within the next decade and will be facing retirement decisions,[6] which may be part of the reason that the U.S. is projected to see a shortage of between 37,800 and 124,000 physicians by 2034.[6] Furthermore, we are also looking at a projected national shortage of 3.8 million unpaid family caregivers by 2030. By 2040, the shortfall will be much larger: 355,000 paid workers, and the family and friends shortfall will be a shocking 11 million.[7]

This looming shortage of physicians and paid caregivers to care for the growing aging population highlights the opportunity for tech-enabled solutions to take the pressure off an already overburdened healthcare system while giving patients and providers more choices in how they receive and give care. Fortunately, an increasing number of older people are considered to be digital natives and will most likely have much of this technology integrated into their lives as they continue to age.

The issue of an aging population is especially important in rural areas. Rural residents tend to be older on average than those in urban areas.[8] This not only points to how problematic the provider shortage will prove to be for this community but also speaks to the challenge of accessing healthcare services.

Nearly

20%

of Americans live in rural areas. Less than 10% of physicians practice in rural communities.[9]

Closing gaps in care

Historically, people living in rural areas have had to travel farther to receive healthcare services and, in general, have less access to providers and services than their urban counterparts. Rural communities can benefit greatly from the advancements in tech-enabled care.

The adoption of tech-enabled care by rural patients would dramatically shift this reality, enabling them to access care from their homes and connect to healthcare providers in ways that have not previously been available in their communities.

Technology and digital tools provide opportunities for engaging aging and rural populations in new ways and empowers them to be more directly involved in their healthcare journey. It also helps them stay healthier longer by creating new ways to support those with chronic conditions and reducing the need for them to physically visit their providers to receive care.

Tech-enabled care complements existing care options and empowers patients with more choice. Recognizing this, the healthcare industry must value education as a way to improve and increase adoption, which will be increasingly essential as the offering of tech-enabled care tools broadens. One barrier to consumer adoption of technology-enabled tools is that, although digital tools are seen as important, most people prefer human interaction. It is clear that the combination of digital and in-person care is necessary.

Patients with chronic conditions are more likely than others to regularly use technology-enabled tools including telehealth, in-home medical devices, online appointment scheduling and refilling their prescriptions via an app.[1]

59%

of those who use telehealth, patient portals, wearables, online appointment scheduling and apps to refill prescriptions reported feeling great about the overall state of their health and wellness.[1]
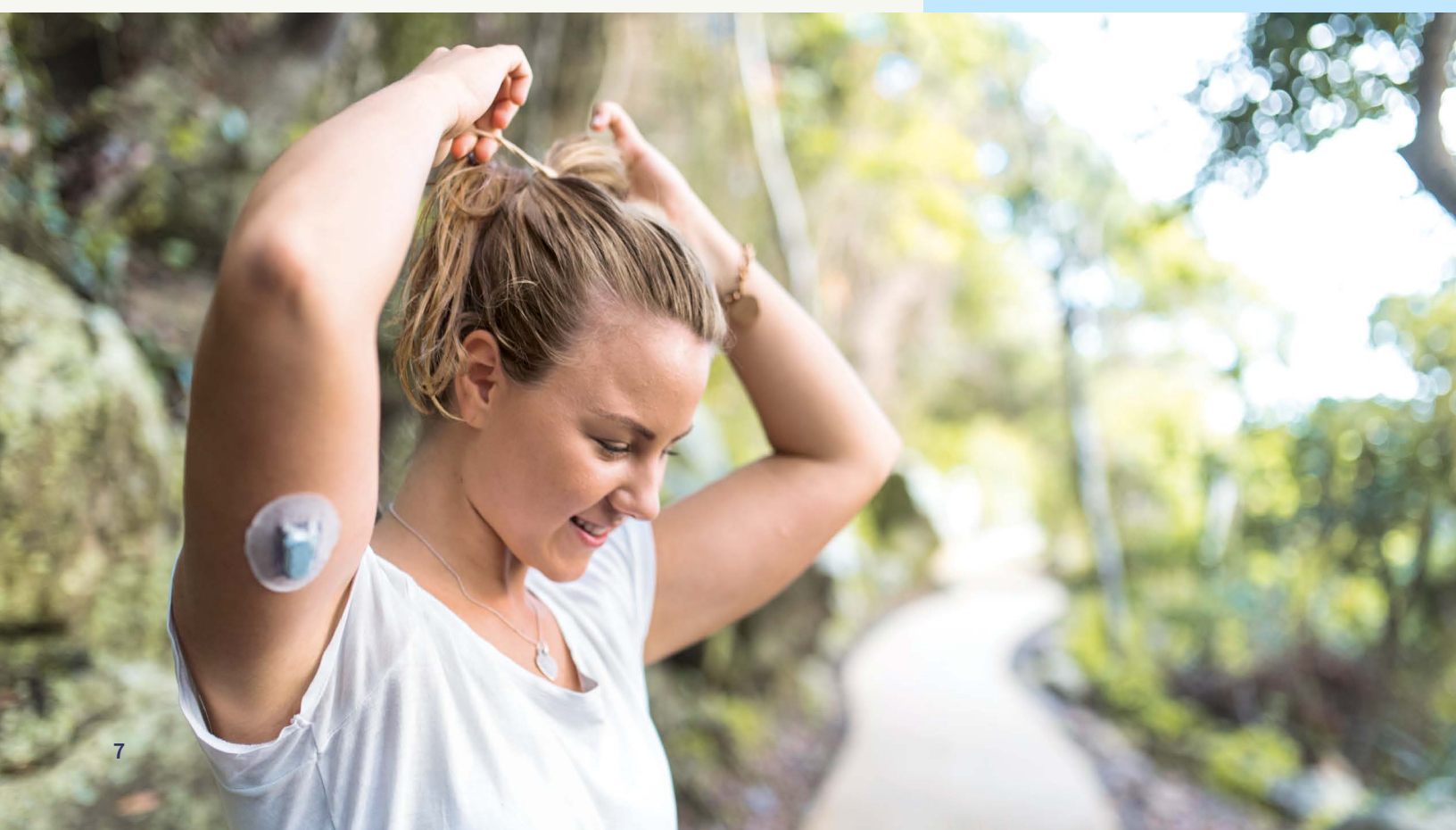
The Walgreens difference

As consumer and healthcare industry adoption of new technology and digital channels continues to grow, so too will expectations around the patient experience.

Walgreens omnichannel model allows us to meet patients where they are, giving them greater control, flexibility and convenience, which helps create a seamless patient experience. Our approach also supports our partners with tools to improve adherence and lower the cost of care. Our nationwide reach, which includes our diverse physical and digital presence, gives patients choices in how they access and receive care.

Digital tools and channels that provide patients new options to understand and manage their health empower them to take an active role in their healthcare journey. Our pharmacists play an integral role in the communities they serve by building trust with patients and partners, so we know the importance of being a connector within the healthcare ecosystem. Our specialty pharmacists receive additional training in complex and chronic disease states so they can support patients with the extra care they may need.

myWalgreens®

Personalized support for patients
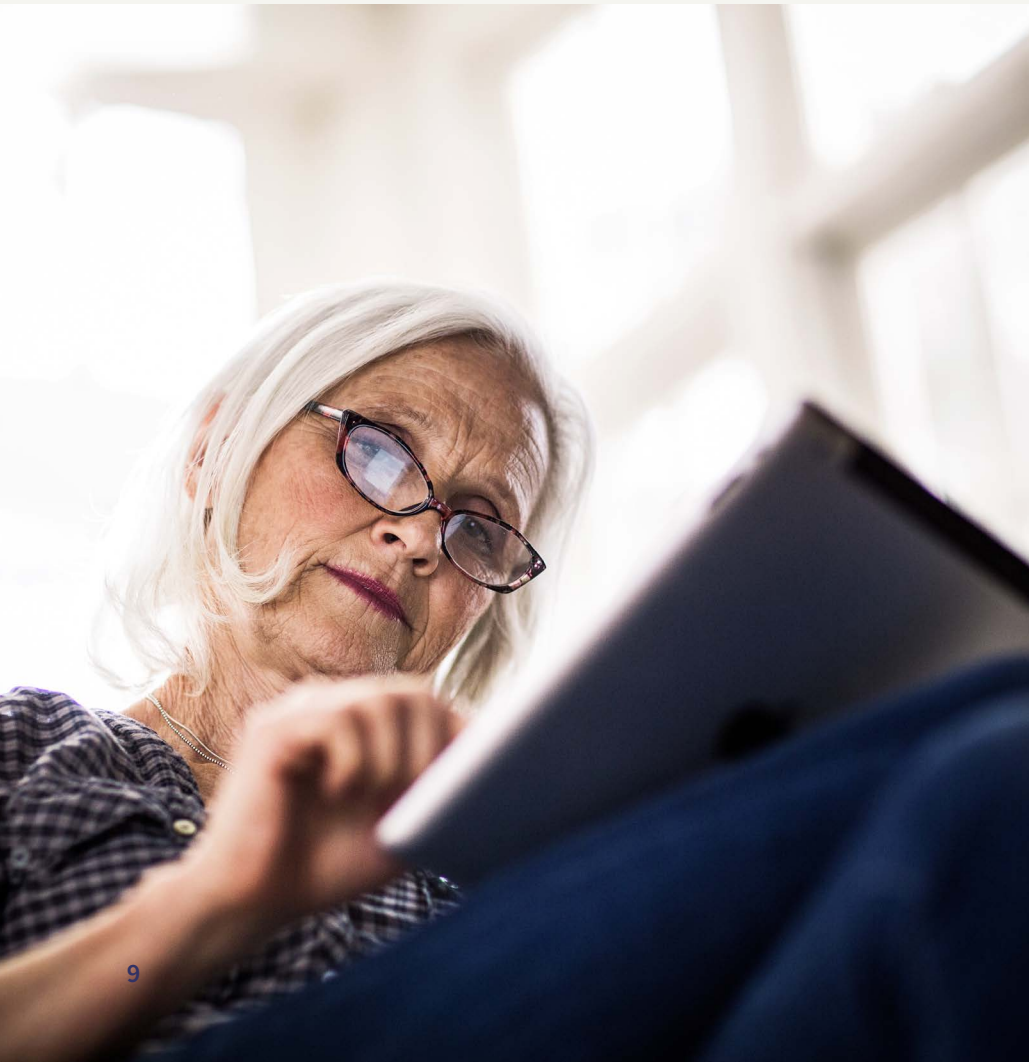
An omnichannel approach

myWalgreens® connects the patient and caregiver experience to the in-store experience, enabling them to access Walgreens services across all touch points of their healthcare journey. Whether they access myWalgreens through their phone, on their desktop or in the store, they are able to receive a seamless care journey.

Services to personalize and streamline care

Walgreens Find Care® connects patients to leading national and local healthcare systems and providers from the comfort of their homes.

- Shows healthcare offerings based on a user's location, ensuring convenient and relevant results

- Helps patients book appointments for a range of services such as urgent care, mental health, lab testing, physician house calls, and COVID-19 vaccines and testing

- Offers connections to 50+ partner providers and 65+ partner services, with medical resources available for more than 120 conditions

- Gives patients access to home test kits and lab services as well as direct contact to medical providers and affordable telehealth services

- Allows patients and caregivers to access a Walgreens pharmacist 24/7 through Pharmacy Chat on the Walgreens App, free of charge

Walgreens Health Corner™ locations are dedicated spaces in stores, where patients can access experienced healthcare professionals for a number of health and wellness services, including support with select digital medical devices, including hands-on trainings and any additional concerns that could impact their adherence.

Tools that provide convenience and choice

- Save a Trip Refills® is a program that synchronizes the pickup or delivery of all of a patient's eligible maintenance medications to one convenient date.

- Refill by Scan provides an easy way for patients to refill prescriptions by scanning the prescription bottle bar code.

A trusted source

Walgreens is a trusted resource in the community, especially when it comes to helping our clients, customers and partners navigate the rapidly evolving landscape of tech-enabled care. With each new technology and capability comes the need for new patient and provider education and adoption. New sources of data must be integrated with other health data platforms to unlock the true potential of each platform's capability. We provide patients with intuitive tools that put them in control of how they manage their care.

This innovative technology not only fills gaps in care left by the traditional healthcare system but also creates avenues for improved outcomes, more engagement and a better patient experience. The once undebatable "front door to care" has moved from the physical front door of the primary care provider to an ever-shifting space meant to create more options to delivering care and meeting the needs of an increasingly diverse population.

1. Walgreens Research conducted March 2022. Tech-enabled care online survey of 2,502 consumer respondents. **2.** Chandrasekaran R, Katthula V, Moustakas E. Patterns of use and key predictors for the use of wearable health care devices by US adults: insights from a national survey. *J Med Internet Res.* 2020;22(10):e22443. doi:10.2196/22443 **3.** Venture funding in digital health sector up 66% with a record $14.8 billion raised in 2020. Mercom Capital Group Web site. January 6, 2021. Accessed June 22, 2022. https://mercomcapital.com/venture-funding-digital-health-sector-2020 **4.** Demographic changes and aging population. Rural Health Information Hub Web site. Accessed June 22, 2022. https://www.ruralhealthinfo.org/toolkits/aging/1/demographics **5.** Jacobsen L, Kent M, Lee M, Mather M. *America's Aging Population.* Population Reference Bureau: February 2011:2. Vol. 66, no. 1. Accessed June 22, 2022. https://assets.prb.org/pdf11/aging-in-america.pdf **6.** IHS Markit Ltd. *The Complexities of Physician Supply and Demand: Projections From 2019 to 2034.* Association of American Medical Colleges:June 2021:viii. Accessed June 22, 2022. https://www.aamc.org/media/54681/download **7.** Miller M. The future of U.S. caregiving: high demand, scarce workers. Reuters Web site. August 3, 2017. Accessed June 22, 2022. https://www.reuters.com/article/us-column-miller-caregivers-idUSKBN1AJ1JQ **8.** Baernholdt M, Yan G, Hinton I, Rose K, Mattos M. Quality of life in rural and urban adults 65 years and older: findings from the national health and nutrition examination survey. *J Rural Health.* 2012;28(4):339–347. doi:10.1111/j.1748-0361.2011.00403.x **9.** *Rural Report: Challenges Facing Rural Communities and the Roadmap to Ensure Local Access to High-quality, Affordable Care.* American Hospital Association:February 2019:5. Accessed June 22, 2022. https://www.aha.org/system/files/2019-02/rural-report-2019.pdf

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