Geonetric

2022 Consumer Health Survey

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Executive Summary

This survey is part of an ongoing initiative to better understand the preferences and perceptions of health consumers relating to their use of technology throughout the healthcare journey. As healthcare systems work to craft their digital front door strategies, this information should help you address consumer desires and meet them where they want you to be.

Consumerism has been a growing force within healthcare and healthcare providers are under more pressure than ever to meet the expectations of healthcare consumers. At the same time, healthcare consumers have a growing array of care options, many of which are digital or have digital components.

To accomplish this, we walk through a typical healthcare journey to better understand what tools and channels they prefer for individual stages along the way. We then dug deeper into several key steps in those journeys – what tools are preferred when researching health information, the importance of different factors when selecting a new care provider or health system, who is changing care providers and why, and the trust being placed in different care providers, both more traditional players in the space and new disrupters from retail, tech, and startups.

The reality is that, over the course of the pandemic, patient-provider loyalty has eroded. Whether due to switching from one healthcare provider to another or increased splitting of care, 43% of consumers received care from a new provider or new health system in the past two years. Although there are many reasons, a large number of provider changes over the same two years have been due to the general desire for something better — better service, better options, or simply a desire to try something new.

When selecting care, the core fundamentals are most important to consumers. Does the provider take my insurance and can I get an appointment? After that, information on price, quality, and convenience are next on the criteria list. In fact, all of these criteria rank above having an existing relationship with the provider!

Consumers now expect providers to operate on their terms and meet them where they are. When healthcare organizations can't answer questions about price, have inconvenient hours, and can't schedule appointments online, they're less competitive.

As these consumers go looking for other care providers, they're finding more and more options available and no place is that more clear than telehealth. Using telehealth as the example, we tested consumers' confidence in the landscape of available care options.

What we learned is that being the local healthcare system still offers a trust benefit over other care options but, in many cases, that benefit is slim. Consumers are almost as comfortable receiving care through a service provided by their insurance company as through their local health system.

I hope the insights in this report help you craft your own organization's digital front door strategy.

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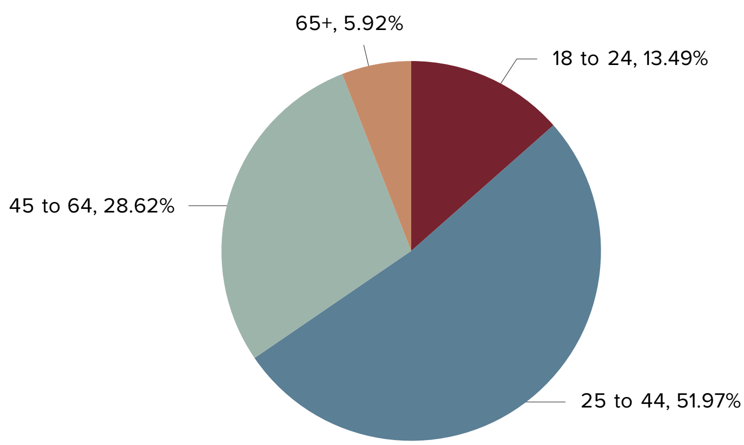
Audience Segments

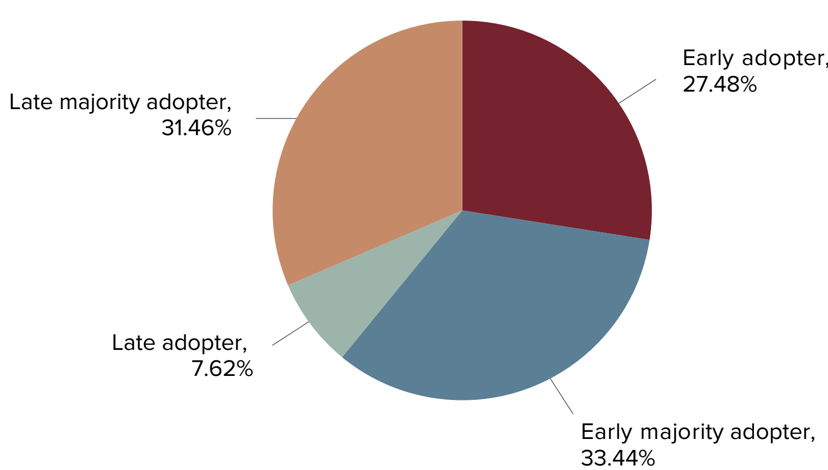
As we seek to understand how healthcare consumers engage with the healthcare system using technology, it's important to remember that every person is an individual. It's useful to group consumers into some audience groups by similar behaviors. There may be times when we want to connect with particular groups and the ways that we do that need to adjust or we may just need to use different channels and approaches to connect with our consumers to meet them where they are.

Age of Respondents



Although the survey respondents include representation from each age group, there is an abundance of respondents in the 25-44 age group. Throughout this survey report, it will be noted where this could potentially impact any results. Regardless of age, most are the main or joint healthcare decision maker for their household.

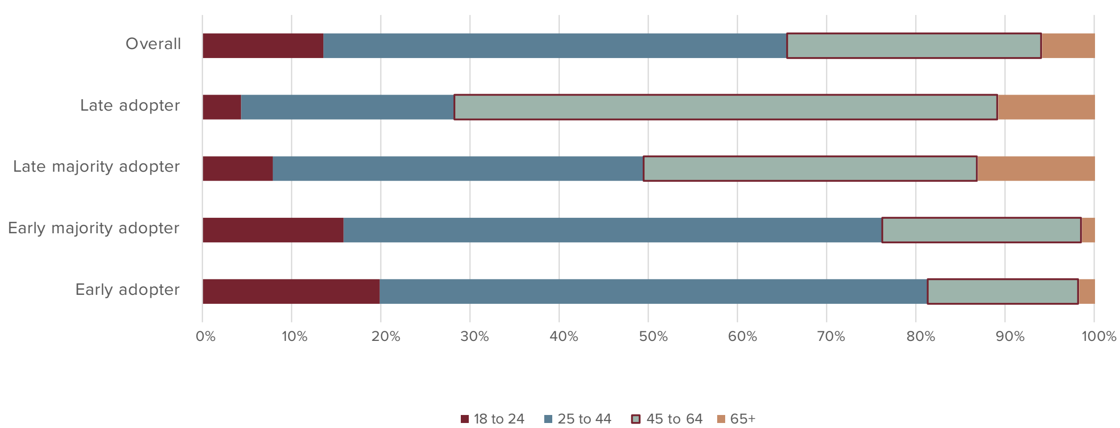
When it comes to adopting new technologies, I consider myself to be a(n)...



It's easy to assume that all young people are early adopters, and all seniors are late adopters, but that's an oversimplification. The majority of those that consider themselves a later technology adopter are indeed older. In the same respect, most of the early adopters are a younger age. However, there are both young late tech adopters and older early adopters. There are just fewer of them. Here are the average ages in each group of adopters. This could be distorted based on the large number of respondents this year in the 25-44 age group.

Overall: 41
Early adopter: 36
Early majority adopter: 38
Late majority adopter: 46
Late adopter: 50

Age group distribution for tech adoption



Preferred Interaction Channels

We asked what tools consumers preferred for each interaction point along a typical healthcare journey. Overall, there is a strong preference for the web, particularly in the early stages of the journey when researching health issues, self-diagnosing, evaluating care options, viewing wait times, and selecting a care provider. The web was the preferred channel across the journey with three exceptions:

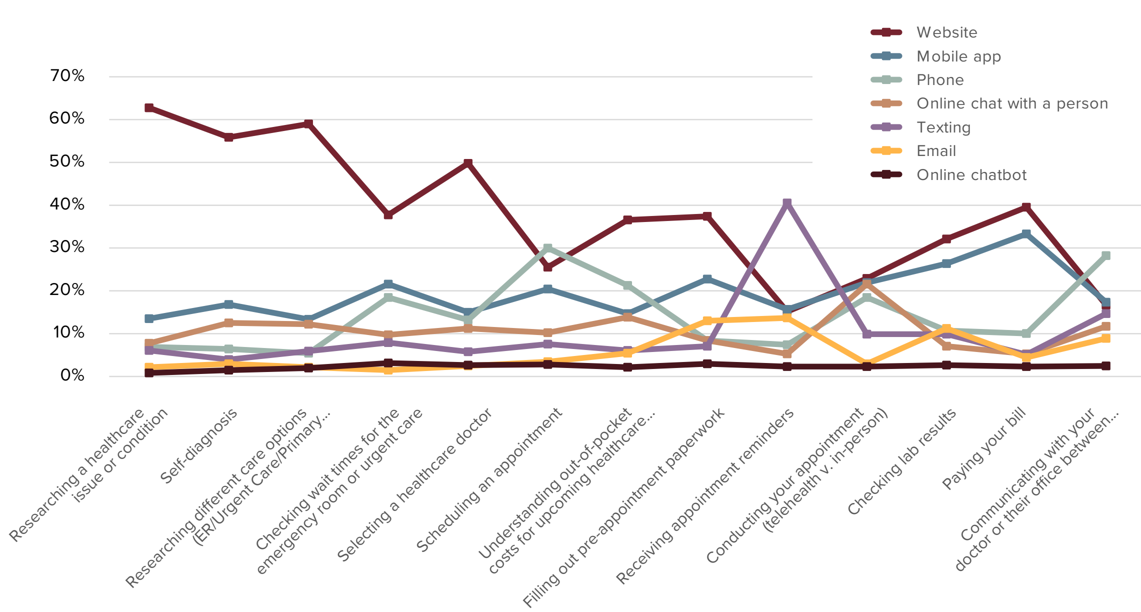
1. When scheduling an appointment (close second to phone)
2. When receiving health reminders (texting dominates here with mobile app also beating out web by a narrow margin)
3. When communicating with the care provider between appointments (here phone dominates with mobile app coming in second).

Mobile apps grow in popularity once a healthcare appointment is scheduled – filling out paperwork, holding the appointment via telehealth, checking labs, and paying the bill.

Seniors and late tech adopters strongly preferred email as a communication channel across most of the healthcare consumer journey.

Mobile apps weren't most preferred by young (18-24) consumers but, rather, by those 25-44 who engage with the healthcare system more regularly to make a mobile app worthwhile. Mobile apps are also more strongly embraced by early tech adopters.

Preferred Interaction Channels



Researching Health Information

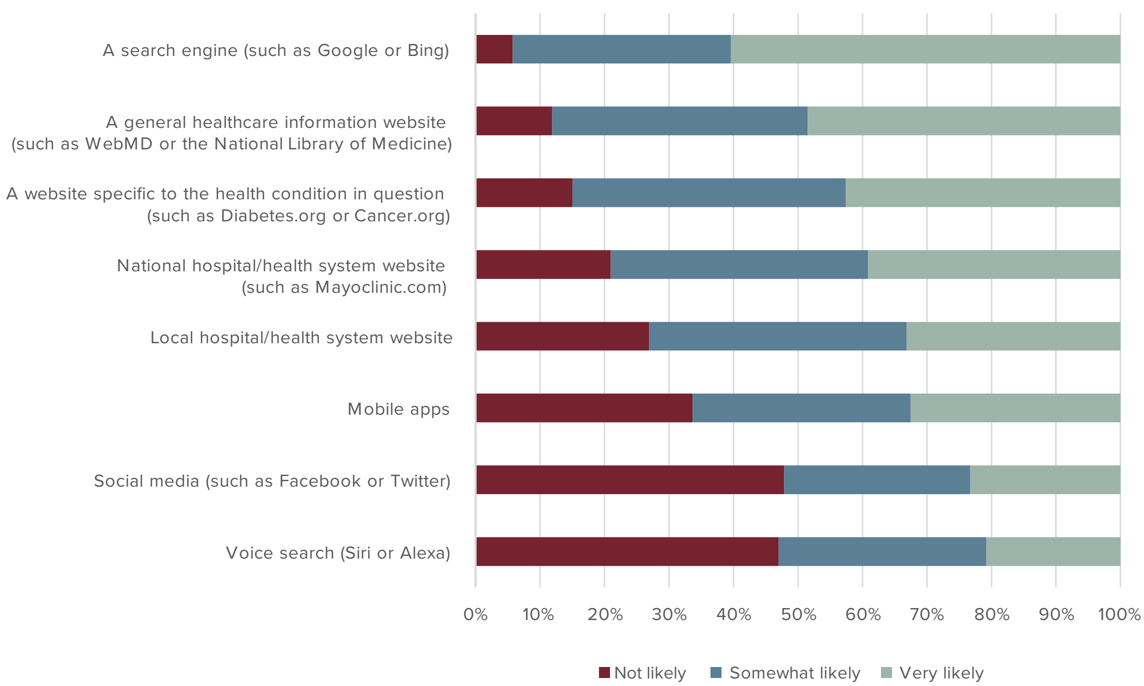
Consumers search for health information across a wide range of channels. While the search engines dominate, with 61% very likely and 94% somewhat or very likely to use a search engine for health research, lots of channels are in use.

The web is the most common place for consumers to engage in this type of research and those searches nearly always start at a search engine. Following search engines, general health sites like WebMD and condition specific sites like Diabetes.org beat our health system websites. Interestingly, well-known national health system brands also beat local health systems as a source of this information, if only by a small margin.

Although they fall lower on the list, it's important to keep in mind that more than half of consumers are somewhat or very likely to use social media or voice search options like Siri and Alexa, particularly amongst early adopters and younger health consumers. These may emerge as important channels to target those consumer segments.

While the use of different information channels is similar across the age spectrum, younger consumers (18-24) are more likely to use local health system websites. Seniors (65+) and late adopters of technology are less likely to use any of the digital information channels surveyed for this information. Across the board, an inclination to earlier technology adoption correlates with more use of digital search channels.

When researching health conditions online, how likely are you to use each of the following?

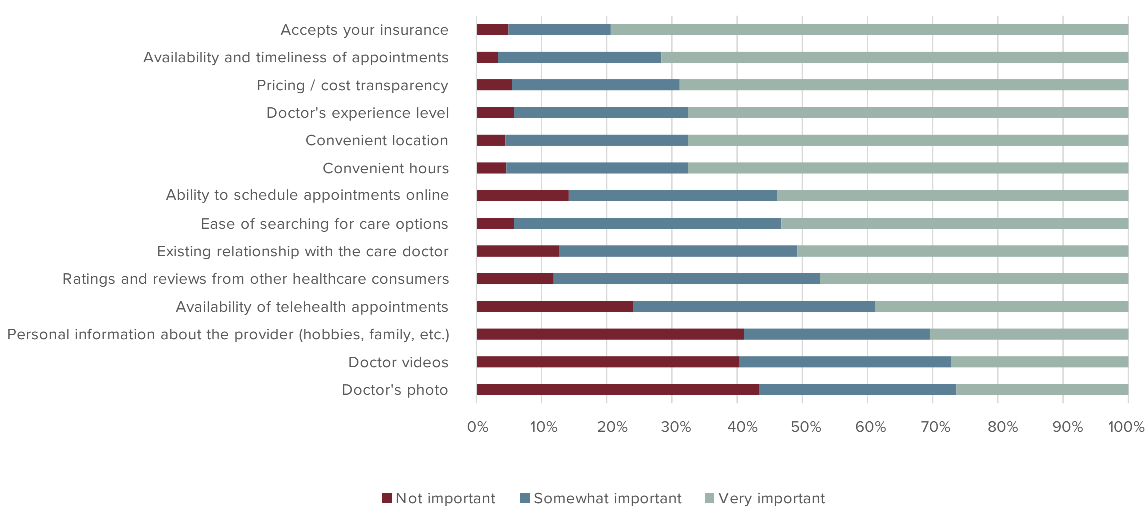


Factors When Seeking Care

Next we looked at the relative importance of different factors when selecting a care provider. The results break into a few tiers from most important to least:

- **The must haves** — We take your insurance and have appointments available.
- **Price and quality** — We offer timely appointments, and you know how much your visit will be. Our doctors are experienced, and we provide quality care. It should be noted however, that the availability of meaningful price information for consumers is still a major challenge for most health systems.
- **Convenience** — We are easily found when searched for. We have convenient locations and hours, and have the ability to schedule online.
- **Existing relationship with the provider** — We already have a relationship with you. Sometimes who you know means everything, however in this case, existing relationships fall in the bottom half of the priority list.
- **Ratings and reviews** — We have good ratings and reviews. Surprisingly as much as a five-star review means a product gets added to Amazon carts, it doesn't seem to matter as much for healthcare. This falls farther down on the list.
- **Intangibles** — We give off a good impression personally through providers' personal info, videos, and photos. People want a good doctor regardless of their personal life.

Last time you sought care, how important were each of the following factors in making your decision?



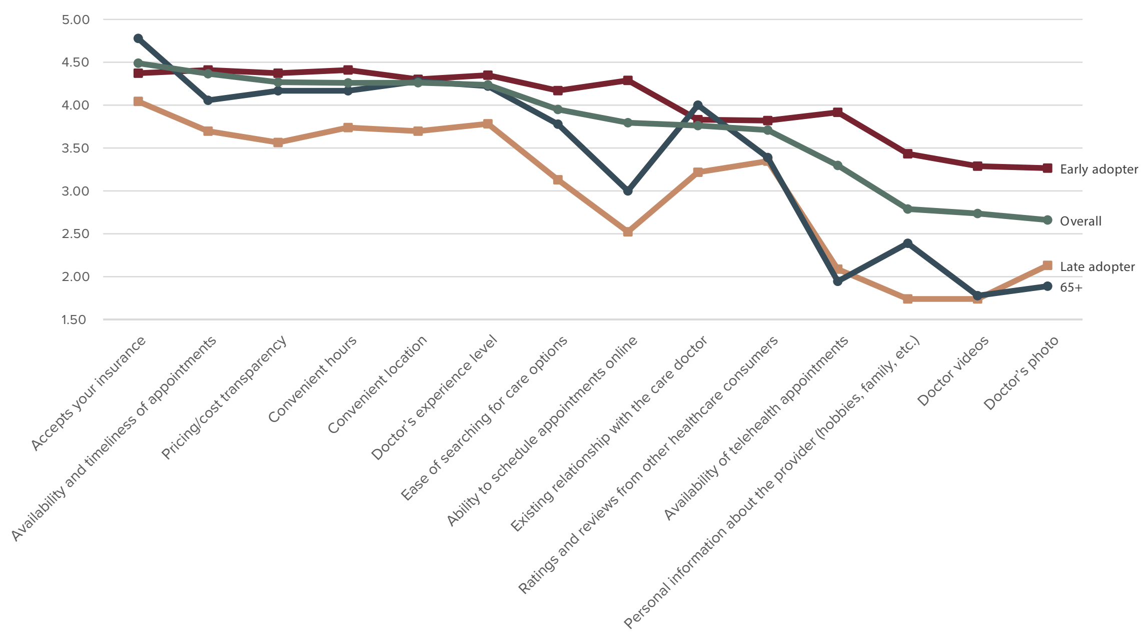
Ordered by importance (scored)

As we look at what is important when selecting a care provider, the answers differ from audience to audience. For example, all of the factors that we surveyed are just less important for the late tech adopters. The late tech adopters are joined by seniors (65+) in placing low value on the availability of telehealth appointments and deeper information about the provider such as photos, videos, and hobbies.

For high priority items such as accepting insurance, availability, convenience factors, and an existing relationship with the provider, the different age groups show very similar levels of interest. This starts to change as we get to online appointment scheduling, where we see a significant drop-off for older segments.

Early tech adopters placed more importance on all items, deviating from the group particularly as we work our way down the priority list, pulling away (to the positive) in the areas where seniors and tech laggards drop off — online appointment scheduling, telehealth appointment availability, and personal information about the provider including doctor photos and videos.

Last time you sought care, how important were each of the following factors in making your decision?



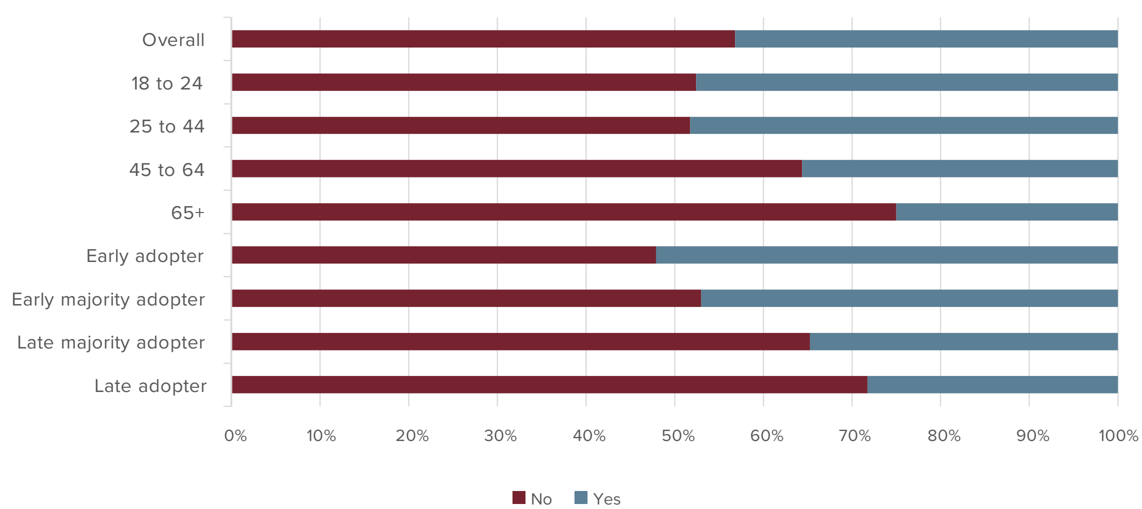
Changing Providers

The pandemic has taken a toll on patient-provider loyalty. Over the course of the past two years, 43% of consumers received care from a new provider. This trend correlated with both age and tech adoption. 48% of young healthcare consumers (18-24) saw a new provider while that figure was only 25% for seniors (65+). More than half of early tech adopters saw a new provider — nearly twice the 28% of late adopters who did the same.

So why did these consumers change providers? The reasons varied greatly, but clustered in a few areas. There are two reasons that are most prominent: healthcare needs were changing, and there was general desire for something better or different. As far as healthcare needs changing, this could be a new diagnosis, injury, or disease. We also placed those that had new referrals from their doctor into this category. There was a general desire for something better overall. However, occasionally this referenced something specific such as, “she wouldn’t give me pain meds.” A desire for something better referred to better service, better options, or that it was time to “try something new.”

A few other themes clearly emerged. Many people moved or, in a few cases, their provider’s office moved. A surprising number of consumers had a doctor move away, retire, die, or leave the medical practice. There were references to price or cost, including changing insurance or their provider no longer accepting their insurance. A desire for greater convenience, including seeking telehealth options was, also a clear theme.

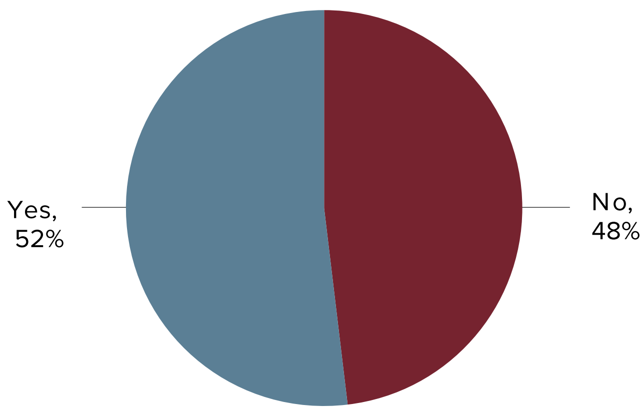
Have you received care from a new provider or healthcare system in the past two years?



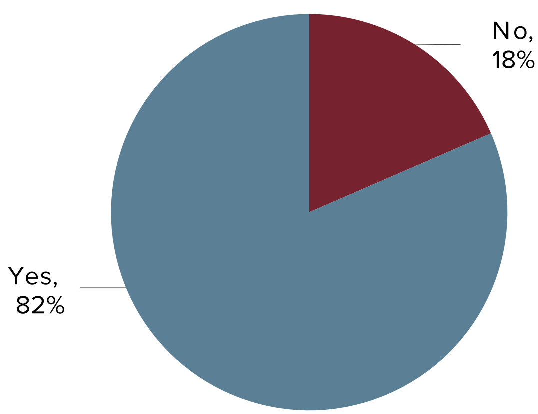
With more than half of respondents having experiences with virtual care in the past year, we can see just how far the new technologies related to telehealth have advanced over the course of the pandemic. At the same time, we see all the signs of a return to in-person care with 82% of respondents indicating that they've received care in-person over the same period.

Virtual Care

In the last year, have you received medical care virtually? (Telehealth, Telemedicine, etc.)



In the last year, have you received medical care in-person? (Primary Care, ER, Urgent Care, etc.)

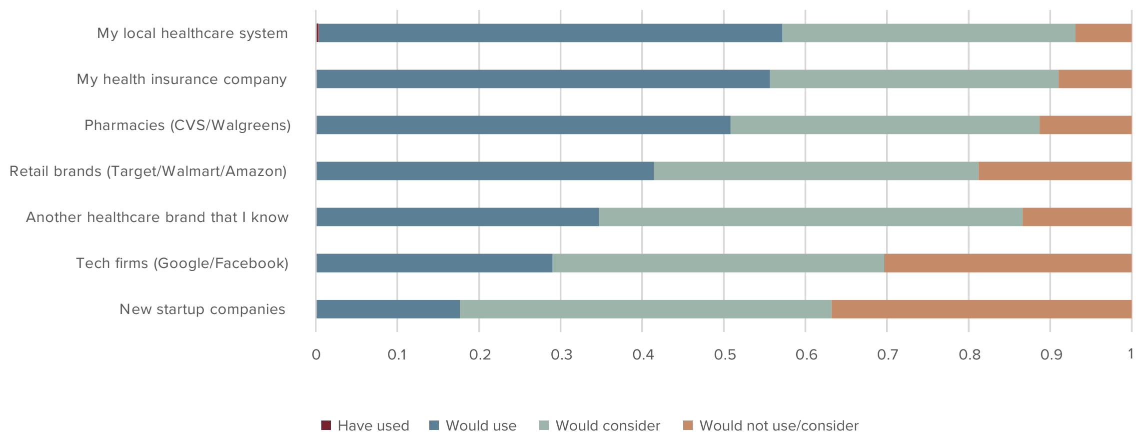


Confidence in Care Providers

The healthcare landscape is becoming increasingly crowded with more and more services coming from insurance companies and pharmacies as well as a host of new entrants ranging from startups to retailers and tech giants. We wanted to get a sense of the level of comfort and trust that consumers were placing with these brands and so we asked about these different categories of competitors as potential providers of telehealth services.

We find that for today, local healthcare systems have a trust advantage for providing these services, although it's a relatively small advantage compared to "my health insurance company" and pharmacies such as CVS or Walgreens.

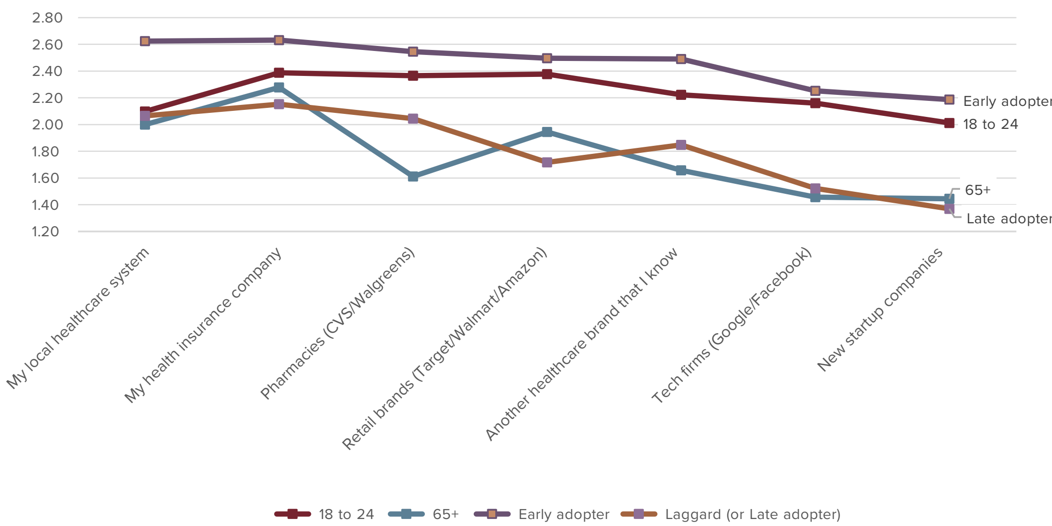
Please rate your level of comfort with using each of the following to deliver quality medical care through telehealth (virtual care by phone or computer)



At the outset, both seniors and late tech adopters simply have a lower level of comfort in telehealth no matter who is delivering it, and as we move down the overall confidence list, the drop-off in confidence from these groups is much more significant. Interestingly, seniors' highest level of comfort is with their insurance company and they have a particularly low comfort with pharmacies for delivering these services.

Early tech adopters are, as we might expect, the most comfortable with all these providers. We might expect young respondents to follow suit but, while their confidence level is high relative to many other groups, they're also a bit all over the map in their preferences for one over another.

Please rate your level of comfort with using each of the following to deliver quality medical care through telehealth (by tech adoption)



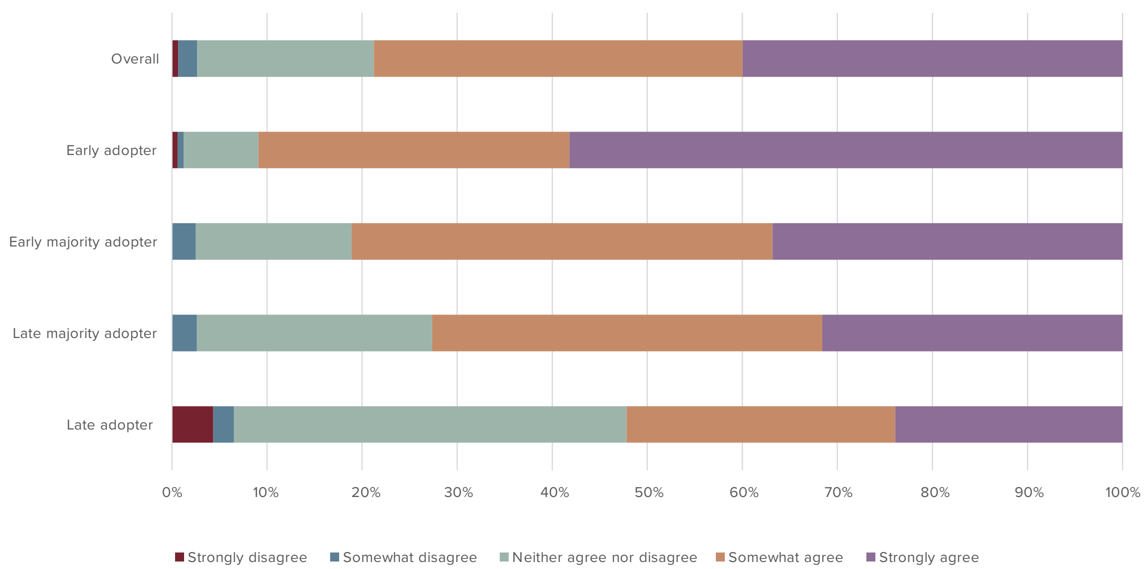
Personalizing the Journey

Consumers want personalized healthcare web experiences. Nearly four out of five consumers agree or strongly agree that they expect healthcare websites to personalize their experience.

While these percents didn't correlate strongly with age, they do map very closely to technology adoption patterns. More than 90% of early tech adopters want personalized healthcare web experiences, while only 52% of late tech adopters expect this.

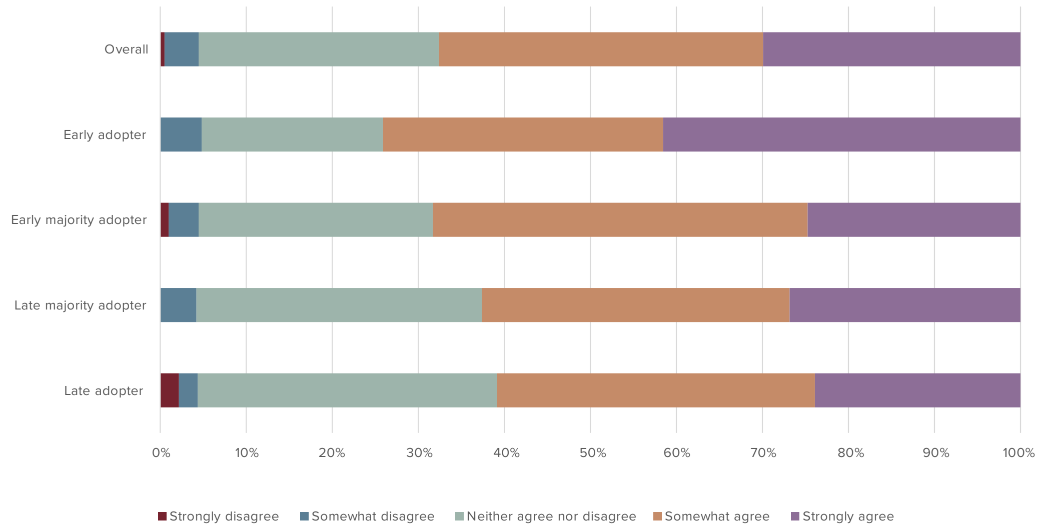
Less than 2% disagreed and less than 1% strongly disagreed with this expectation.

I expect healthcare websites to personalize my experience by understanding my preferences and needs as an individual to deliver more relevant information and services.



Continuing the theme of personalized healthcare website experiences, two-thirds of respondents indicated frustration when healthcare websites show irrelevant information and calls to action. This also correlates with tech adoption with nearly three-quarters of early tech adopters sharing this frustration while 63% of late adopters expressed this concern.

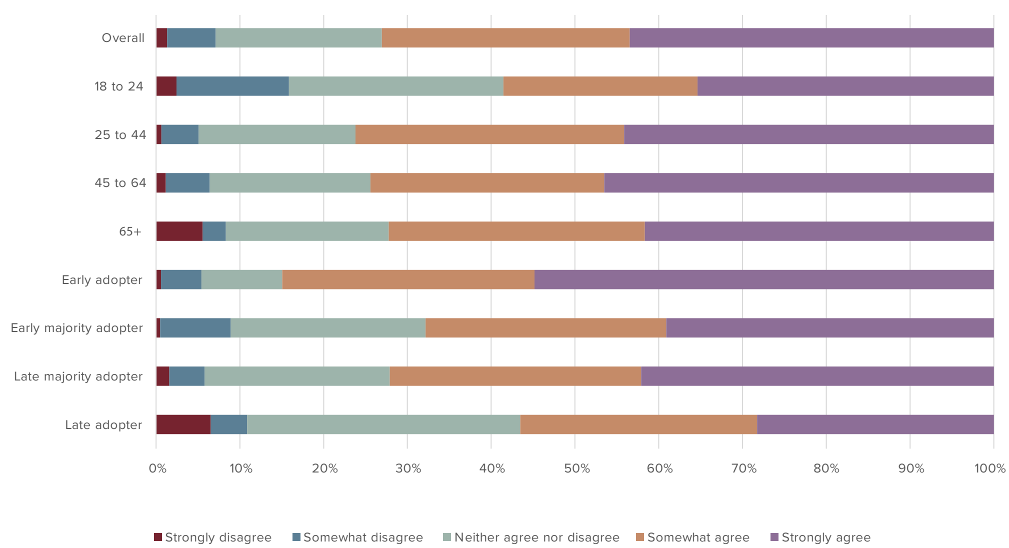
It is frustrating when healthcare websites show or recommend information or actions that aren't relevant to me.



One of the concerns with personalized marketing and healthcare experiences comes from the sensitive information that must be captured and maintained. 73% of consumers trust healthcare websites to protect this information. While that is a large portion of the population, it does leave more than one in four healthcare consumers with concerns.

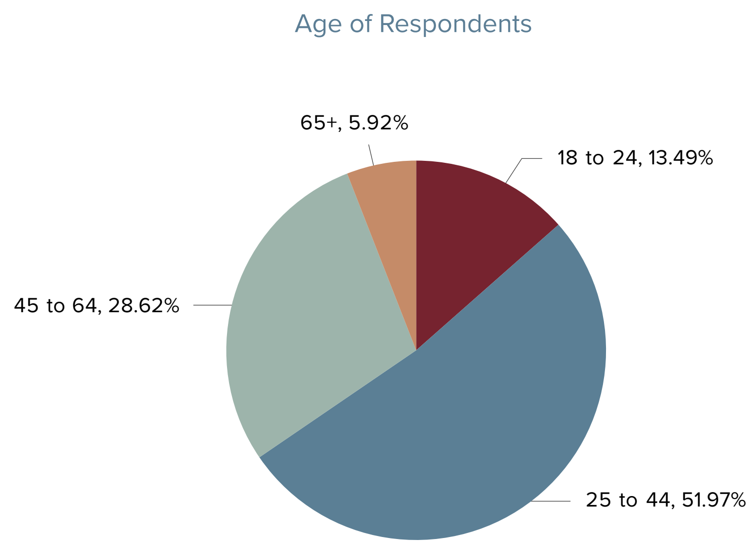
Interestingly, young consumers (18-24) expressed the greatest concerns amongst the different age groups about information privacy with less than 60% trusting healthcare websites to project this information appropriately. This was nearly as low a level of trust as late tech adopters, only 57% of whom expressed this trust. The highest level of trust came from early tech adopters with 85% trusting healthcare sites with their sensitive information.

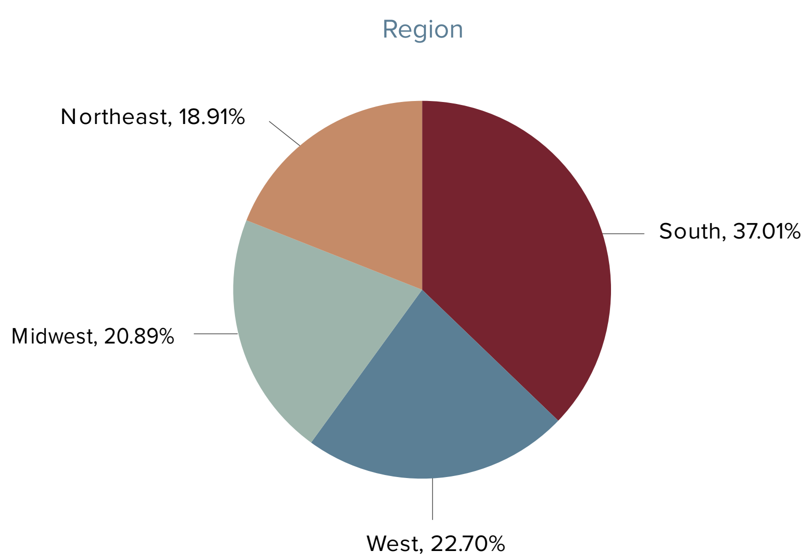
I trust healthcare websites to protect the privacy of my information.



Demographics

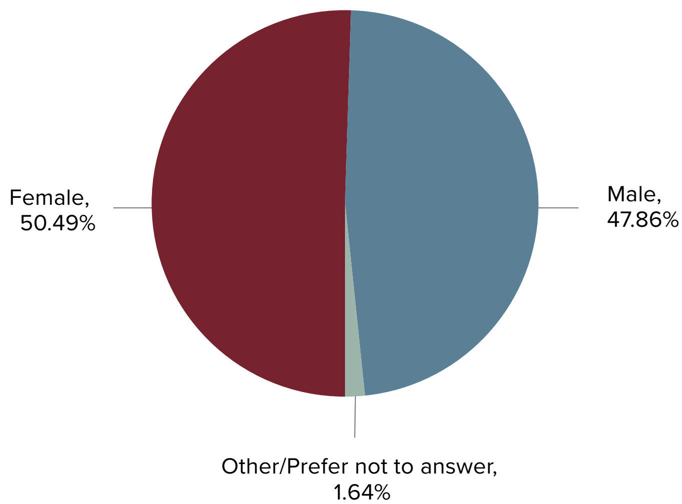
Data was collected through an online survey of Americans ages 18 and older. The age, geographic, and gender distribution vary but includes reasonable representation of the population as a whole.



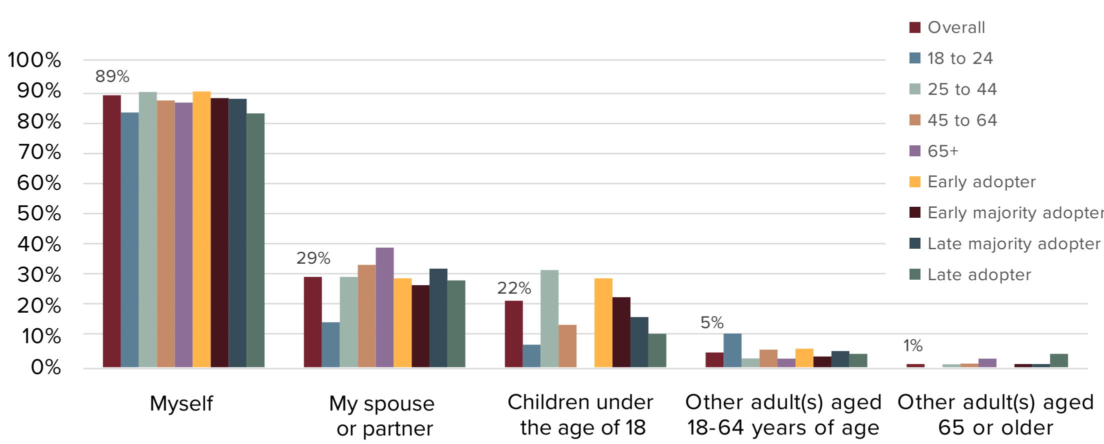


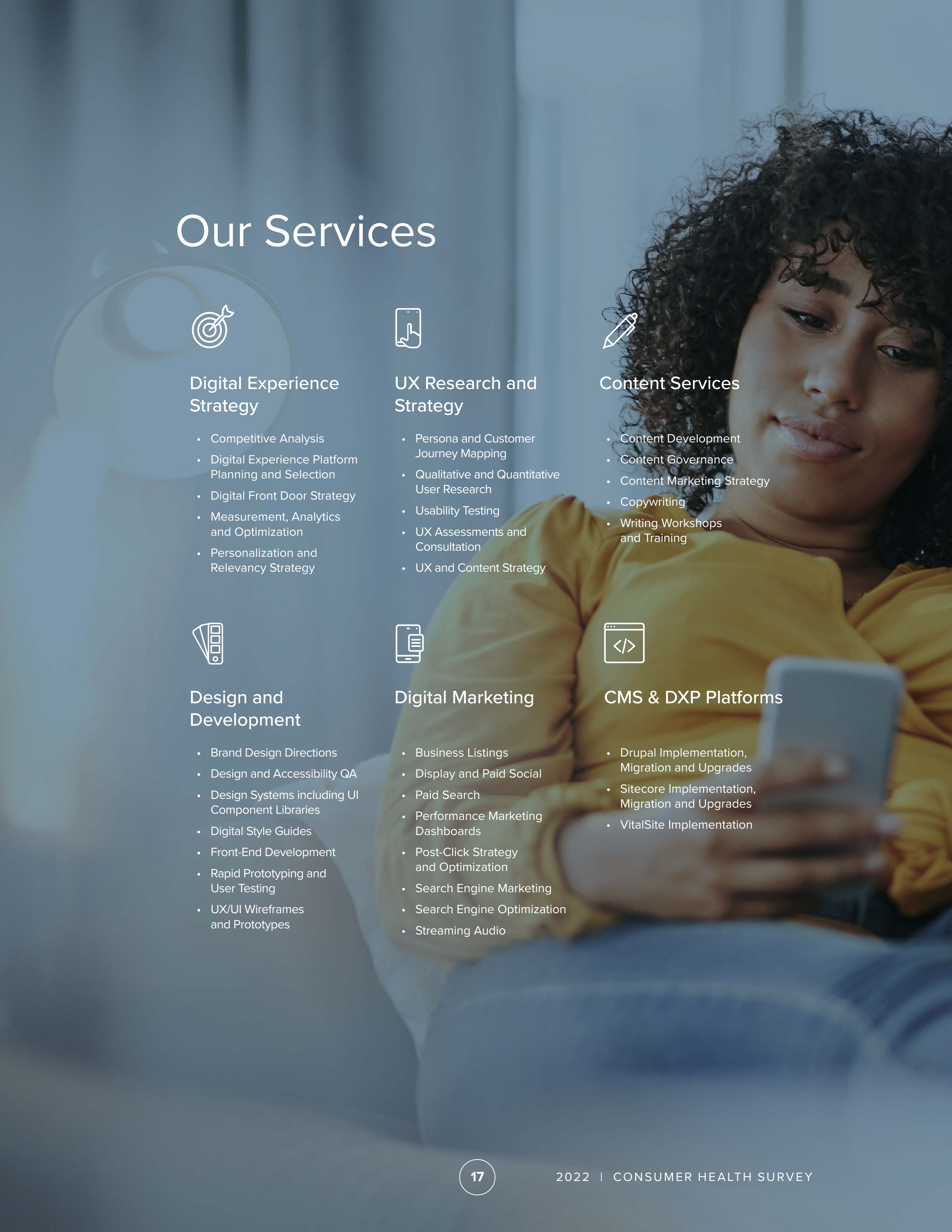
The vast majority of consumers surveyed (89%) were either the main decision maker or shared decision making authority for themselves. 42% of those surveyed also were a decision maker for another person such as a child, spouse, or senior citizen. Young respondents (18-24) were less likely to be involved in healthcare decision making for partners and children. Seniors (65+) had no involvement in the care decisions for children 18 and under (likely because any children that they had were now older).

Gender of Respondents



I am the main or joint healthcare decision maker for





Our Services

Digital Experience Strategy

- Competitive Analysis
- Digital Experience Platform Planning and Selection
- Digital Front Door Strategy
- Measurement, Analytics and Optimization
- Personalization and Relevancy Strategy

UX Research and Strategy

- Persona and Customer Journey Mapping
- Qualitative and Quantitative User Research
- Usability Testing
- UX Assessments and Consultation
- UX and Content Strategy

Content Services

- Content Development
- Content Governance
- Content Marketing Strategy
- Copywriting
- Writing Workshops and Training

Design and Development

- Brand Design Directions
- Design and Accessibility QA
- Design Systems including UI Component Libraries
- Digital Style Guides
- Front-End Development
- Rapid Prototyping and User Testing
- UX/UI Wireframes and Prototypes

Digital Marketing

- Business Listings
- Display and Paid Social
- Paid Search
- Performance Marketing Dashboards
- Post-Click Strategy and Optimization
- Search Engine Marketing
- Search Engine Optimization
- Streaming Audio

CMS & DXP Platforms

- Drupal Implementation, Migration and Upgrades
- Sitecore Implementation, Migration and Upgrades
- VitalSite Implementation

About Geonetric

As a digital experience agency with deep technical and creative expertise, we provide hospitals, health systems, and medical groups with digital experience strategy, user experience consulting, website redesigns, and creative digital marketing services optimized for the unique needs of the healthcare industry. We have our own popular healthcare-specific content management system, VitalSite®, and create compelling experiences on Sitecore, Drupal and other digital experience platforms.

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