

What's Inside the Mind of the Digital Healthcare Consumer? (Plus lots of other interesting topics!)

Presented by:

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Klein & Partners

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INTRODUCTION

Why?

- The purpose of this year's nationwide quantitative survey was to learn about consumers' digital healthcare habits from online information seeking to online social networking to decision-making.
- Plus we threw in a few 'fan favorite' questions from prior waves!

How?

- A **national online survey** was conducted among **409** heads of household, 18 or older who are most responsible for healthcare decisions for the household and/or themselves.
- Interviewing was conducted from **October 23-29, 2015**. The sample frame used was Research Now's online consumer panel.
- The total sample size of 409 yields a sample error of **+/-4.1% at the 90% Confidence Level (CL)**. For example, if this study were repeated 100 times, in 90 times out of that 100 (i.e., 90% confidence level) we would find a total sample statistic of 50% to fall within approximately 46% and 54%.
 - The final data set was weighted by geography, age, education, ethnicity, and income.
- **Significant differences are called out in the charts using letters (e.g., A, B, C) or arrows (↑)**. Colors and bolding are used to highlight interesting patterns and/or findings.

Demographic profile	Total US
Female	69%
Children in HH	29%
<u>Ethnicity</u>	
Caucasian	62%
Hispanic	16
African American	12
Asian	5
Other/refused	5
<u>Age</u>	
18-29	24%
30-44	27
45-64	31
65+	18
Average age	46
Median household income	\$56,793
College education	30%
<u>Generally think of yourself as...</u>	
Strongly Republican	9%
Moderately Republican	10
Independent, lean Republican	11
Independent	18
Independent, lean Democrat	9
Moderately Democrat	15
Strongly Democrat	12
Other	1
Not sure	14

30%

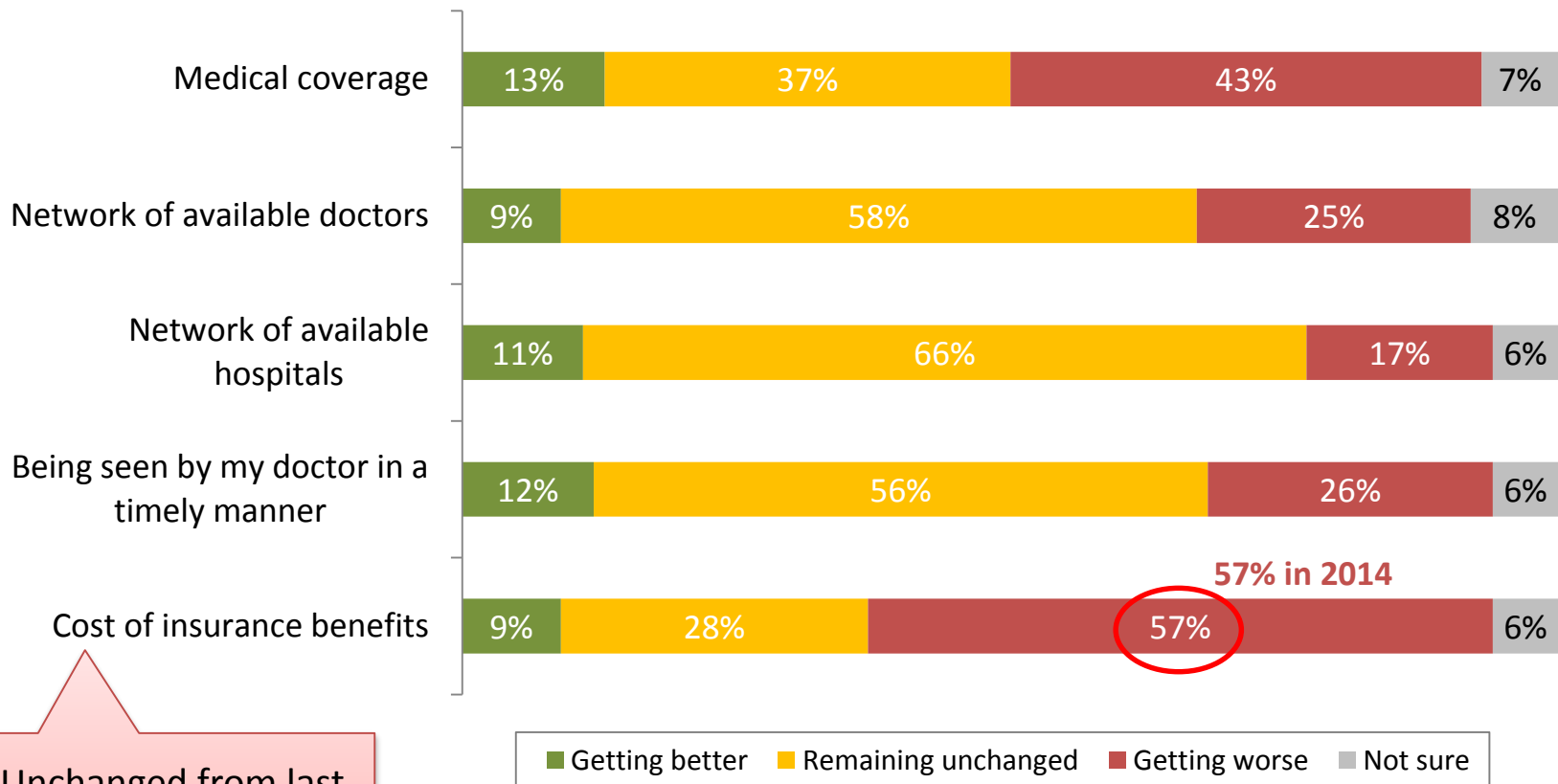
36%

SO WHAT DID WE LEARN?



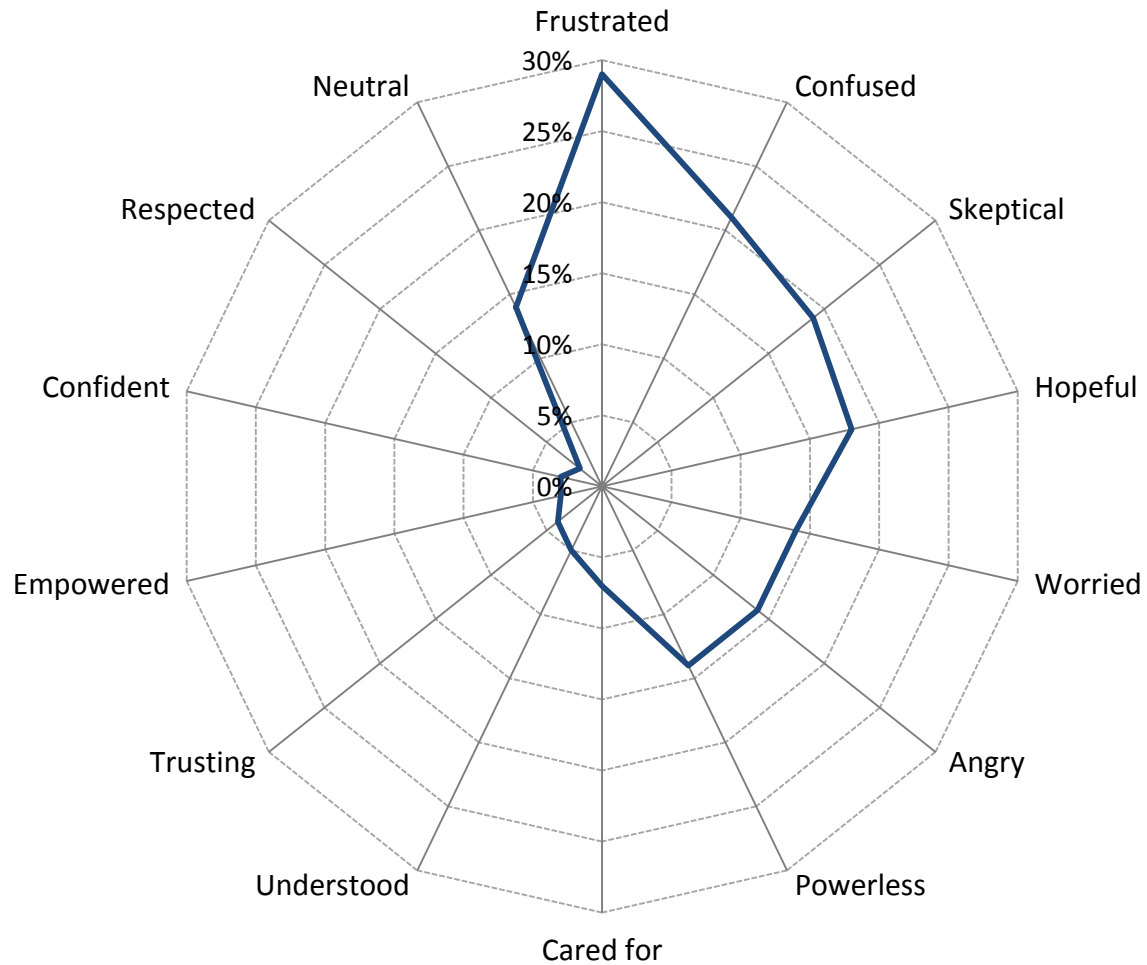
REACTIONS TO HEALTHCARE REFORM

What's Getting Better or Worse for You Under Healthcare Reform?



Unchanged from last year, this is giving rise to the healthcare **'customer.'**

Healthcare Today Makes Me Feel...

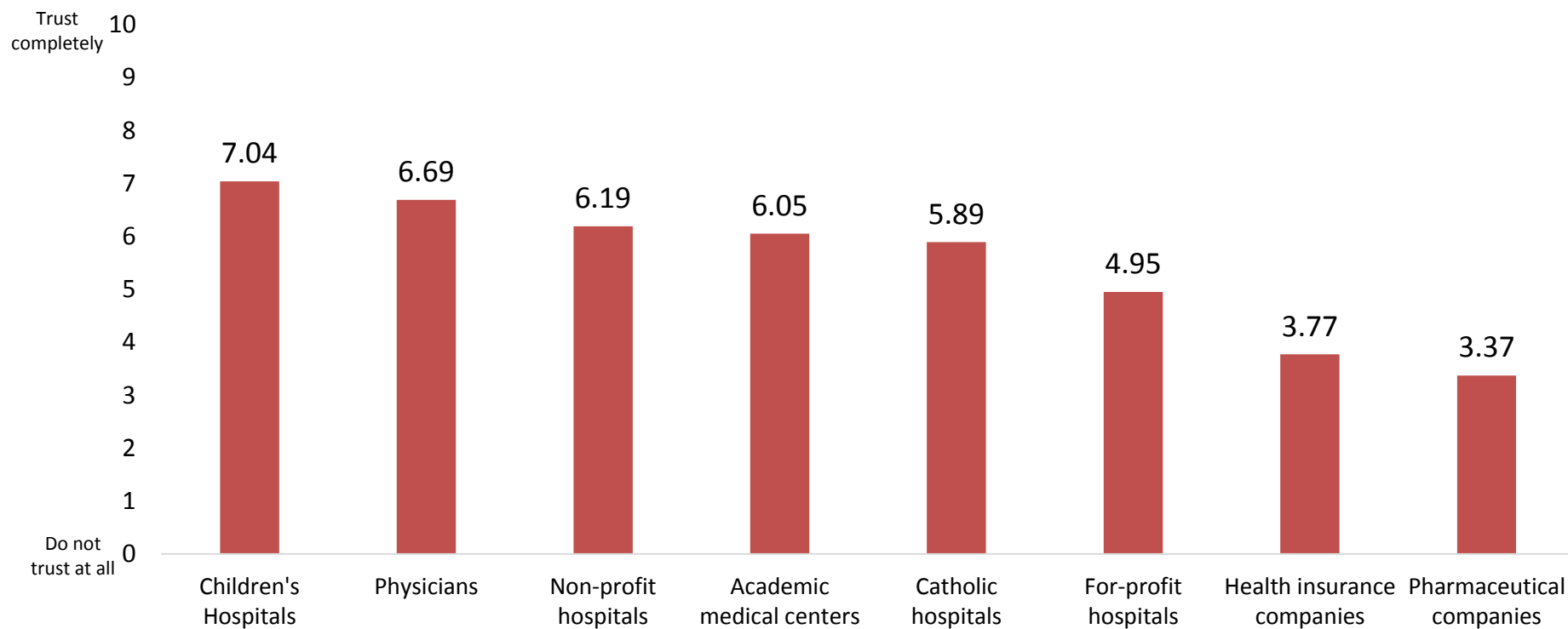


Q2: When you think about the US healthcare system now that the Affordable Care Act has been up and running for a year now, which of the following words describe how you feel about healthcare now?



TRUST IN HEALTH PROVIDERS

Trust Rating for People/Organizations in the News

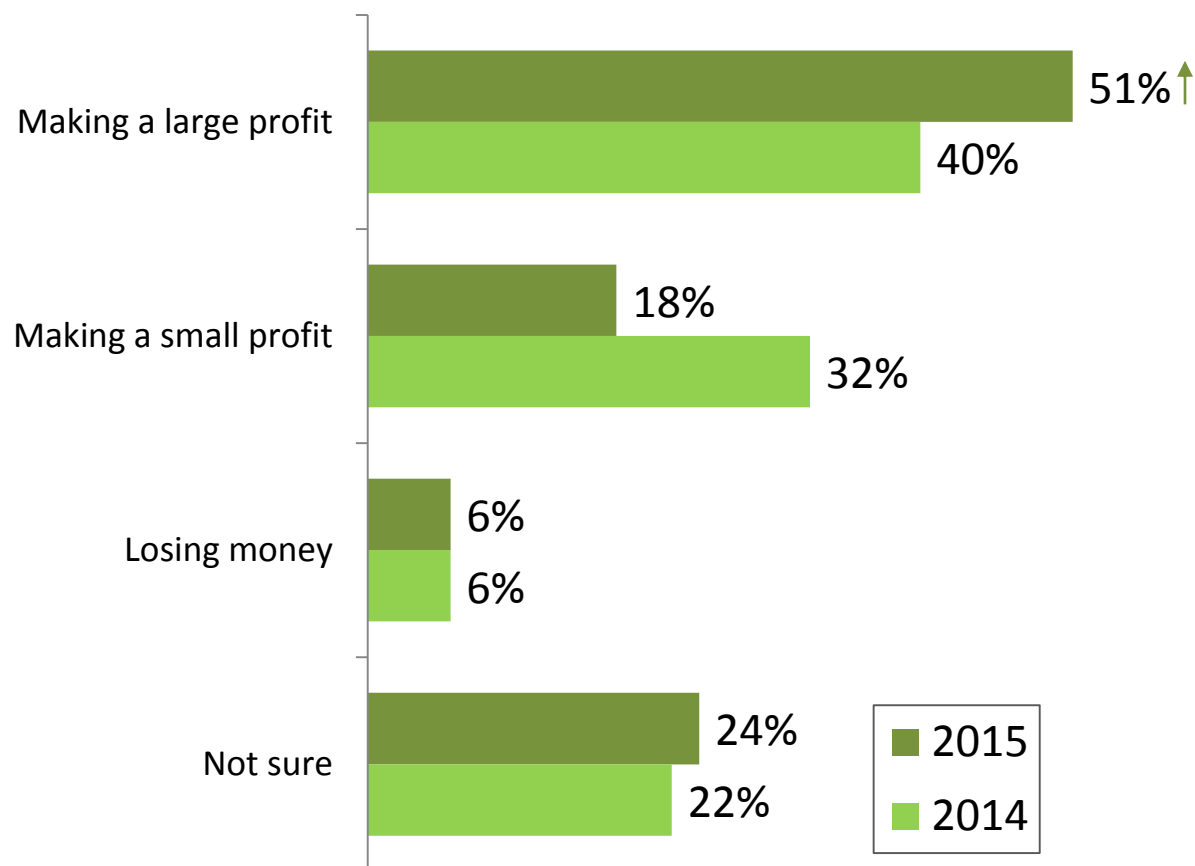


Q3: Next is a list of people or organizations that have been in the news lately. Please tell us how much you trust each using a scale of 0-10 where 0 means you do not trust them at all and 10 means you trust them completely. Of course, you may use any number from 0 to 10.



PERCEPTIONS OF HEALTHCARE COSTS AND PROFITS

Do You Believe Local Hospitals Are...



50% on average!



Q4: In the current healthcare environment, do you believe your local hospitals are...?

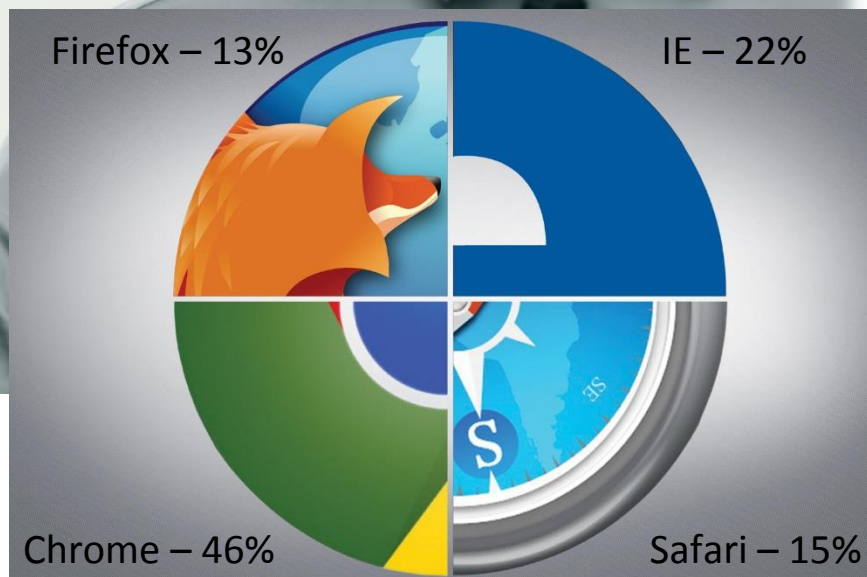
Q5: And what percent profit do you think local hospitals are making? [If large/small profit checked in Q4]



ONLINE HEALTH-RELATED INFORMATION SEARCHING



65% have searched online for health-related information in the past year



Q6: In the past year have you searched online for health-related information?

Q7: When you are searching the Internet for health-related information, what type of device are you most likely to use?

Q8: In general, what browser do you typically use when searching for any information on the Internet?



66% start their health-related search from Google



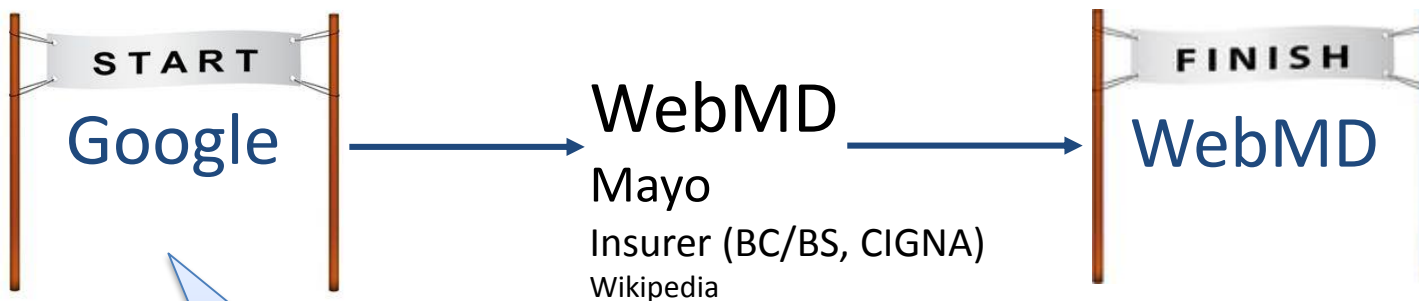
Other starting points:

WebMD – 12%

Go directly to hospital website – 9%

Bing – 4%

Q9: When you start your health-related information search, where do you typically start if it is a new search and not a repeat visit to a site you already found?



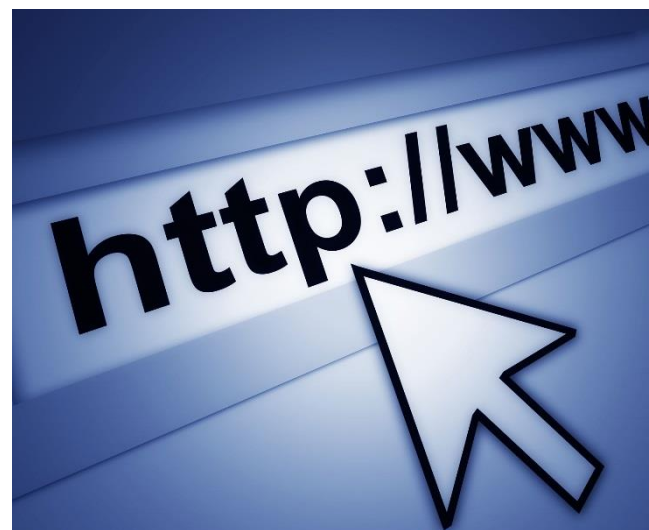
Other Klein & Partners research has shown that most people start their healthcare searches with Google even if they know of websites they probably will end up at.

Next, we'd like you to walk us through your most recent online search for health-related information...

Q10a: First, where did you start your online search?

Q10b: What websites did you go to during this search?

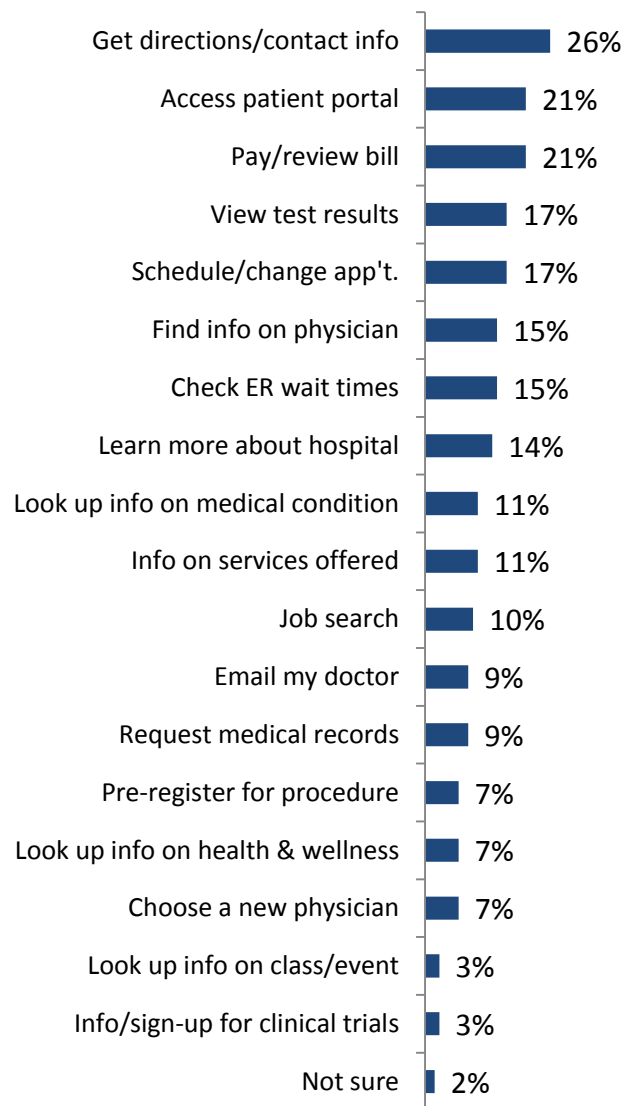
Q10c: And what website did you end up at that had the most useful information?



WEBSITES VISITED



Reasons for Visiting Website



Q11: Have you been to a hospital website in the past 3 months?

Q12: Think about the most recent hospital website that you visited. What were your main reasons for visiting this website?

National website experiences are on par with what we are seeing 'on average' in our gSightSM research.

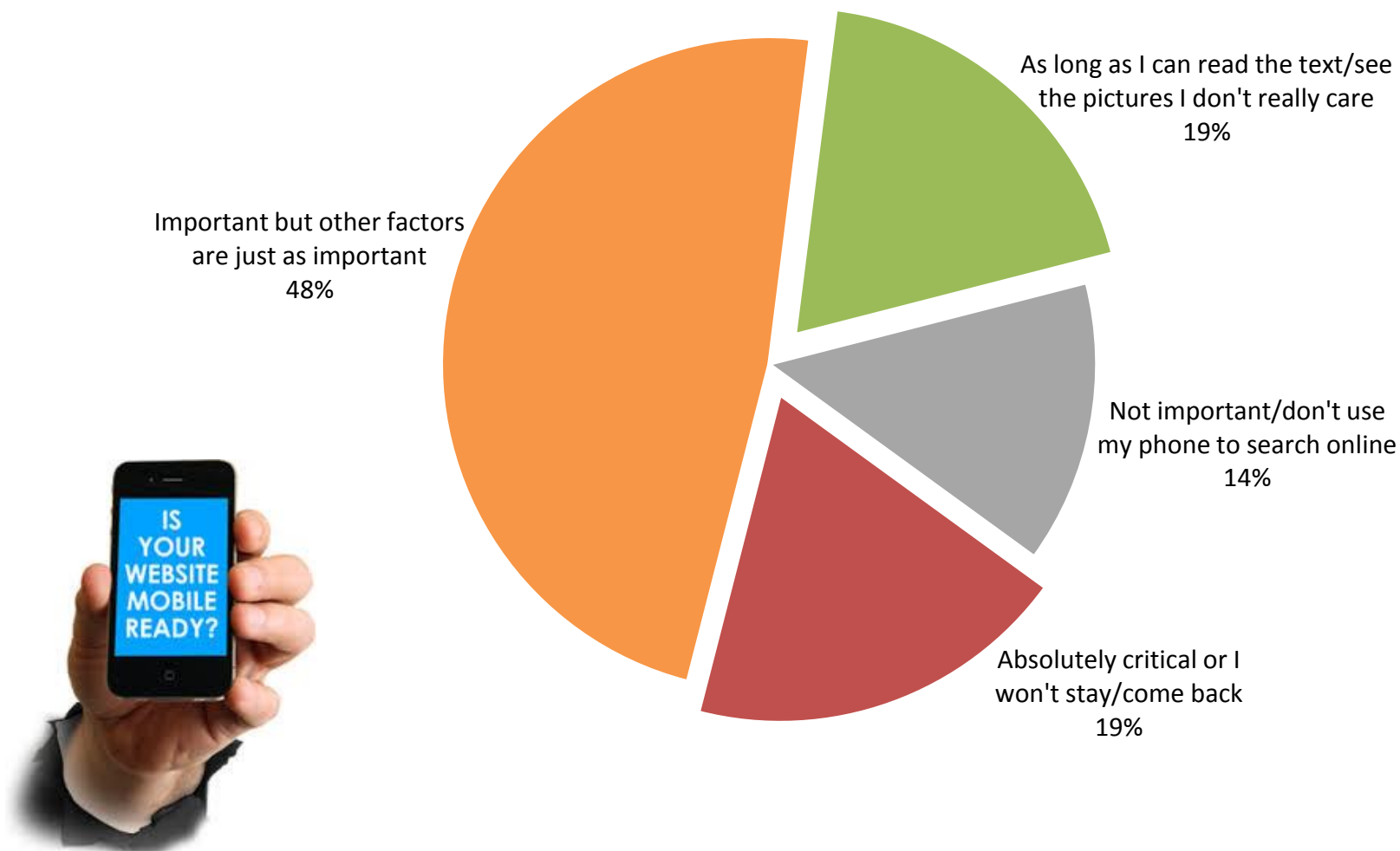
	Overall Number of Stars Awarded to Website	Mean Score
Consumers nationally		3.83
*Benchmark		3.72
**Leaderboard		4.20+

Scores based on **gSightSM**, an online web experience survey

***Benchmark:** The 'norm' or average across all gSightSM studies.

****Leaderboard:** What score does it take to be the 'A' student?

How Important is a 'Mobile Friendly' Website to You?



Q14: How important for you is it that a hospital or health system website be 'mobile friendly?'



Q15: Think about your experiences on a hospital website. How important to you are each of the following elements of a hospital website?

Note: If you add up the must have and nice to have scores and subtract from 100% what is left is the 'not important' score.

3-4 clicks to find what I want...

Search 

...after that I'm outta here!

Q16: When you get to a website that you want to search health-related information on, how many clicks is acceptable to find what you were looking for before you start thinking you want to get off that site?

Articles and videos must load within a few seconds (47%) to within 10 seconds (30%).

Video length – about 4 minutes



Q17: When you click on an article or video, for example, what is the maximum acceptable load time you are willing to wait?

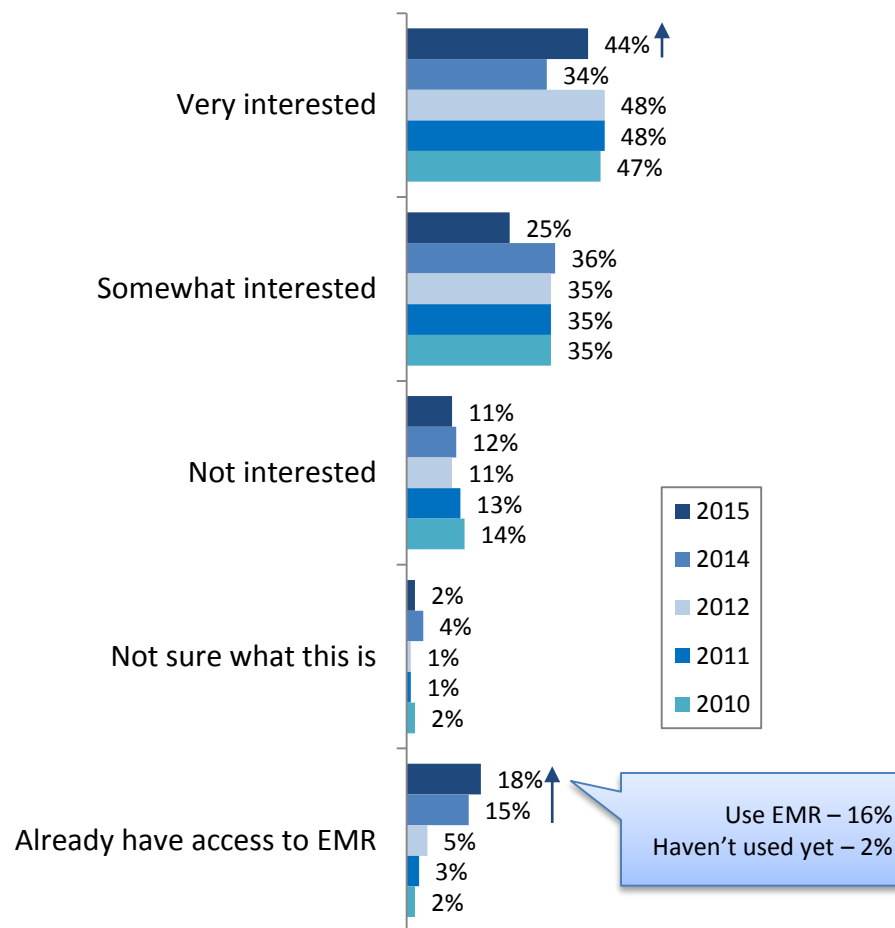
Q18: And how long is the maximum acceptable length of video (i.e., before you want to stop the video)?





ELECTRONIC MEDICAL RECORDS

Interest in Having Online Access to Electronic Medical Record



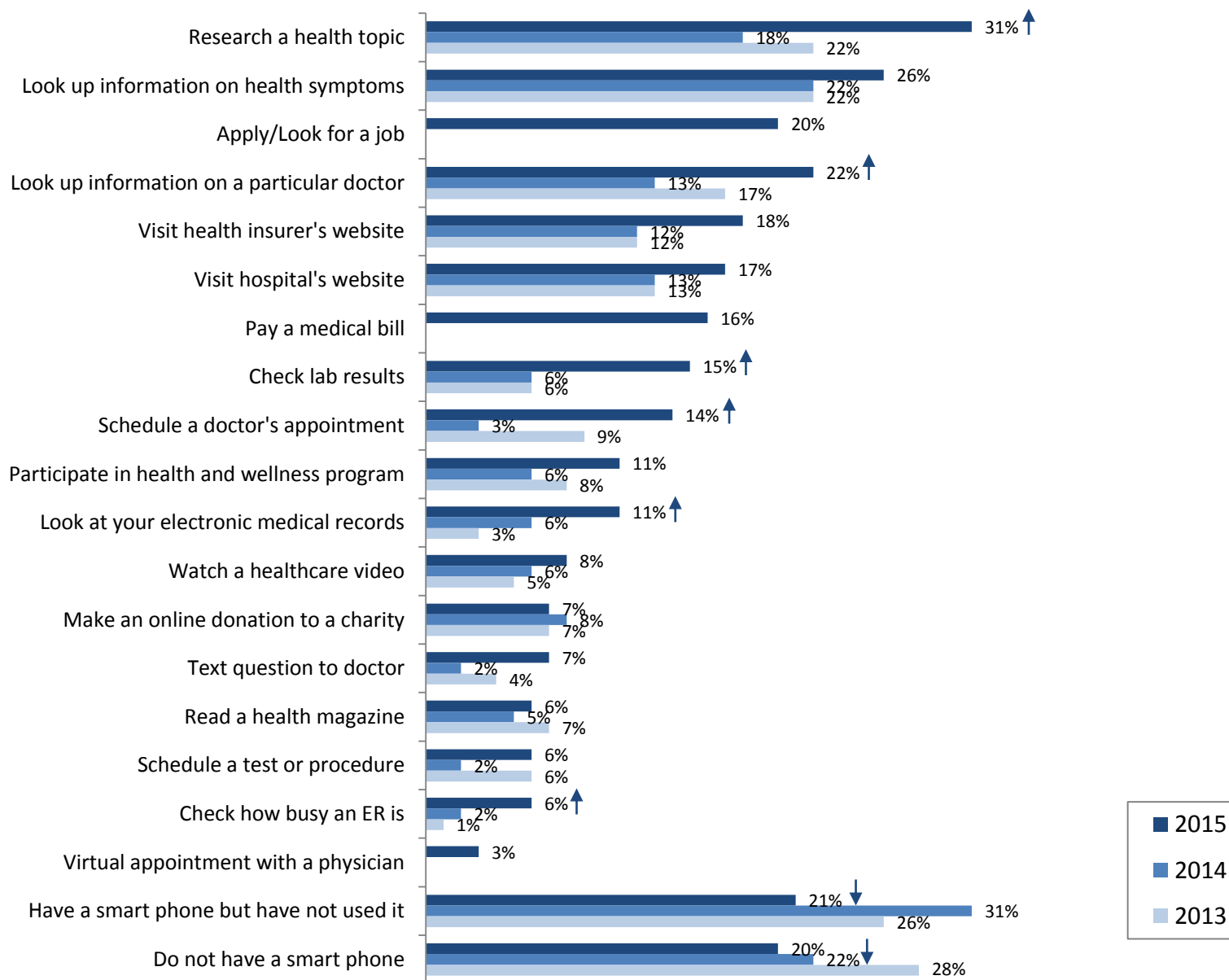
Q20: How interested would you be in having online access to your own personal health record – called an Electronic Medical Record (or Patient Portal) – to track your own health through a secure website that only you and your doctor and hospital can access?



‘Can you hear me now?’

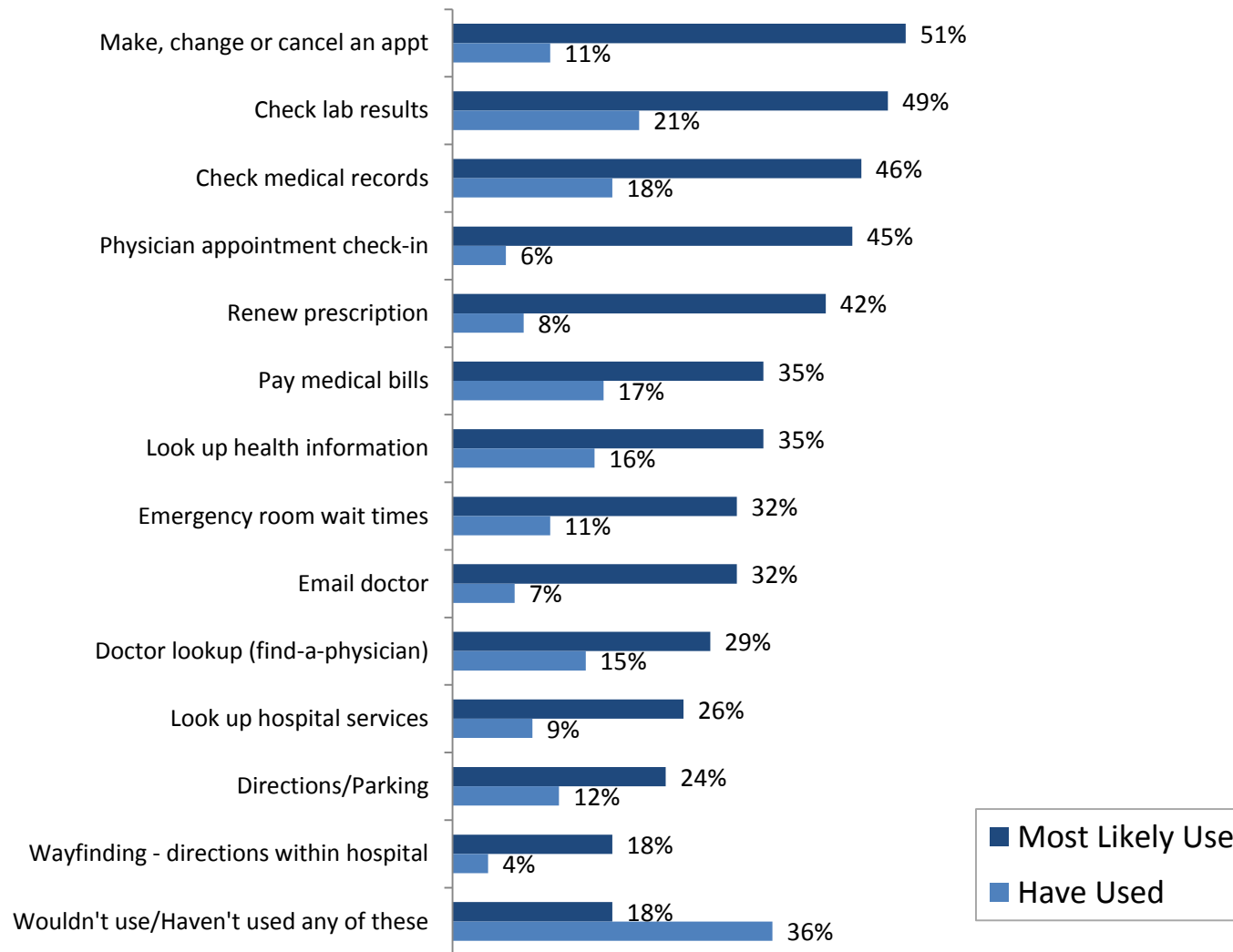
SMART PHONES

Current Health-Related Smart Phone Uses

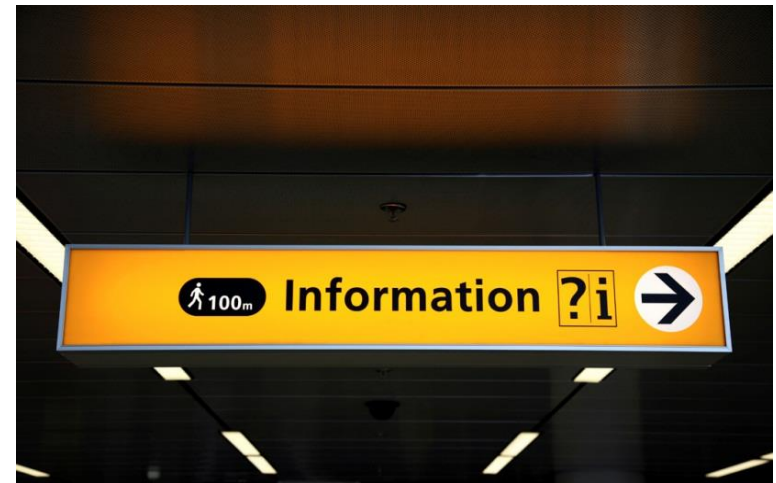


Q21: Next, have you used a smart phone (e.g., Droid, iPhone, Blackberry, or any phone that can access the Internet) to go online and do any of the following...?

Hospital Apps Most Likely To Use (Among the 80% with a smart phone)

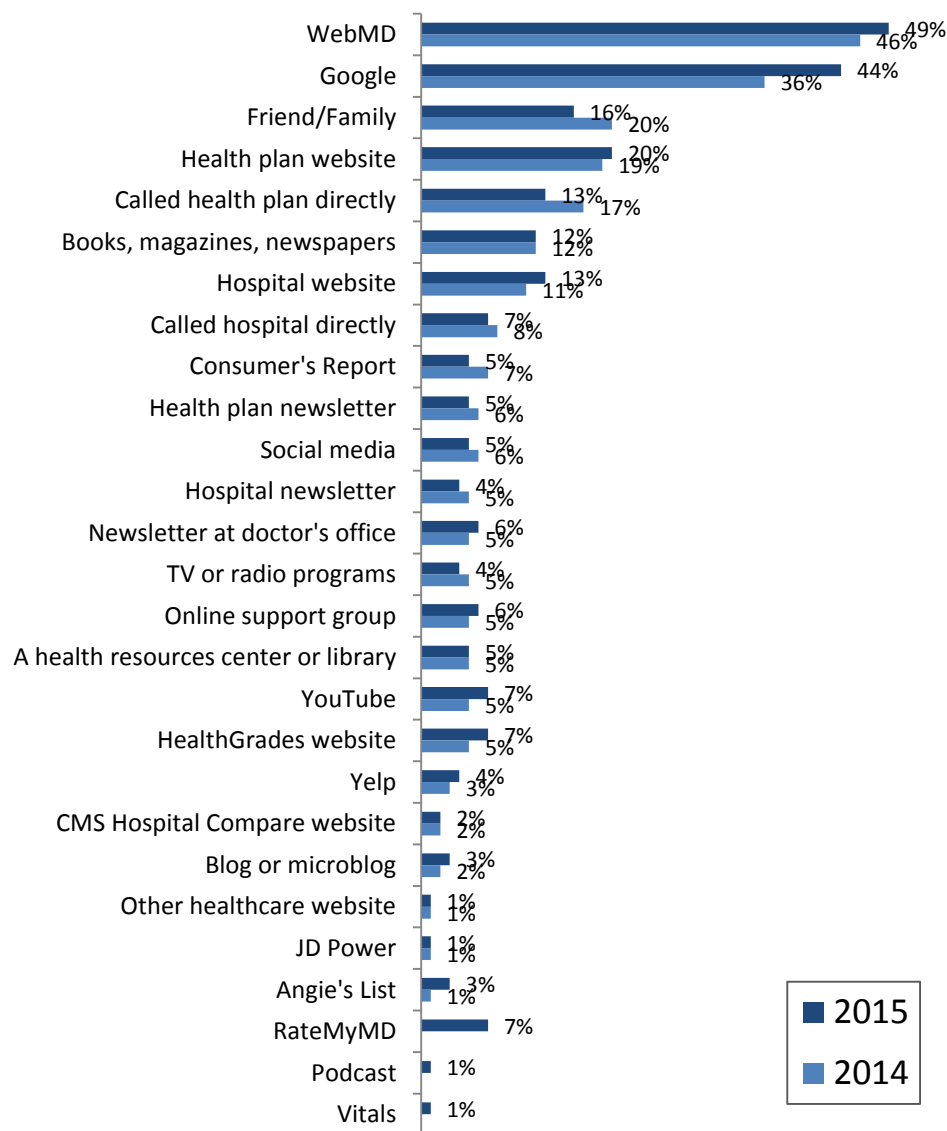


Q22: If a hospital you used offered a mobile App for your smart phone, which of the following features would you most likely use?
Q22a: And which of these features of a hospital's App have you actually used?



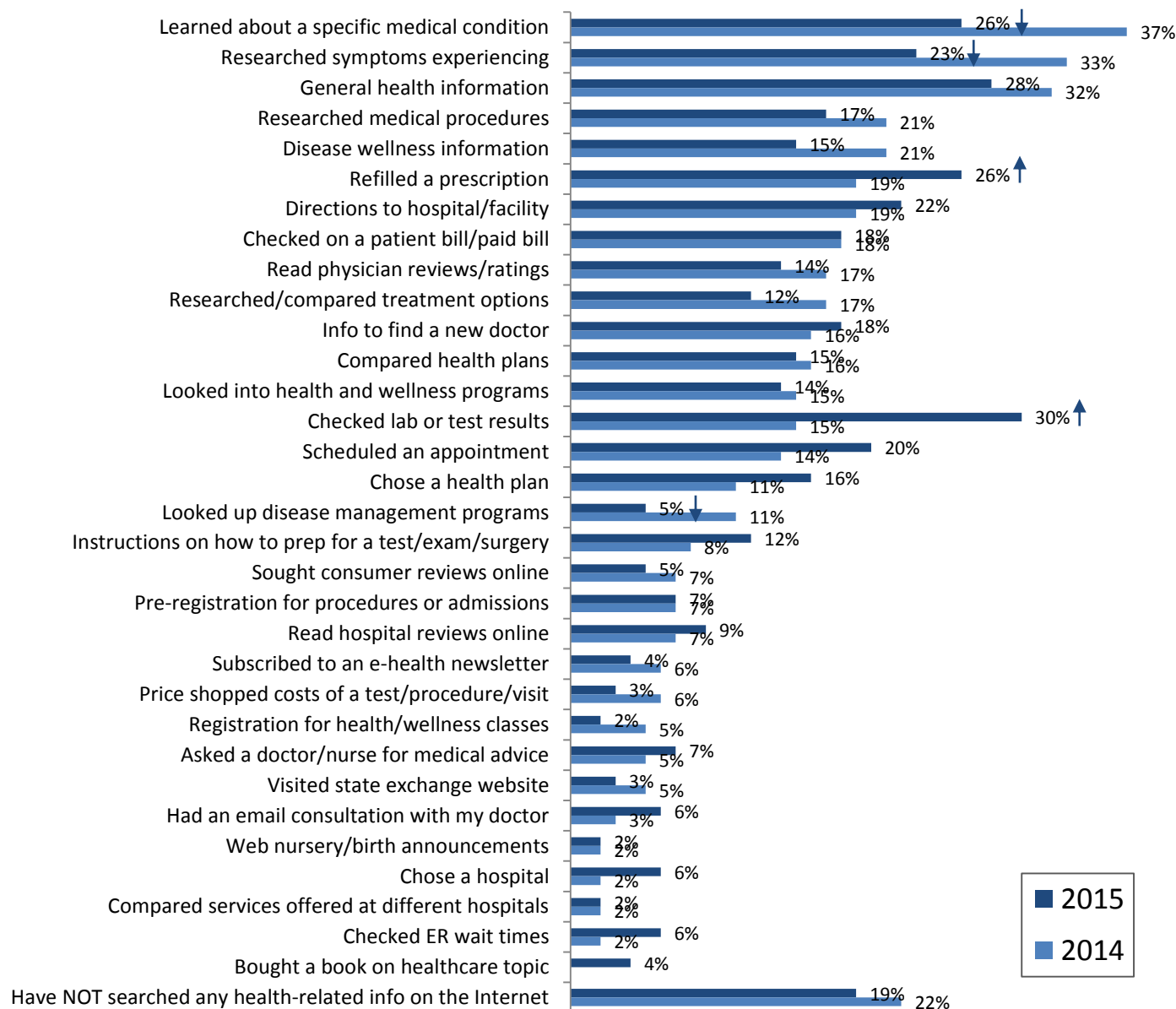
INTEREST IN INFORMATION SOURCES

Sources of Health-Related Information Sought in Past Year



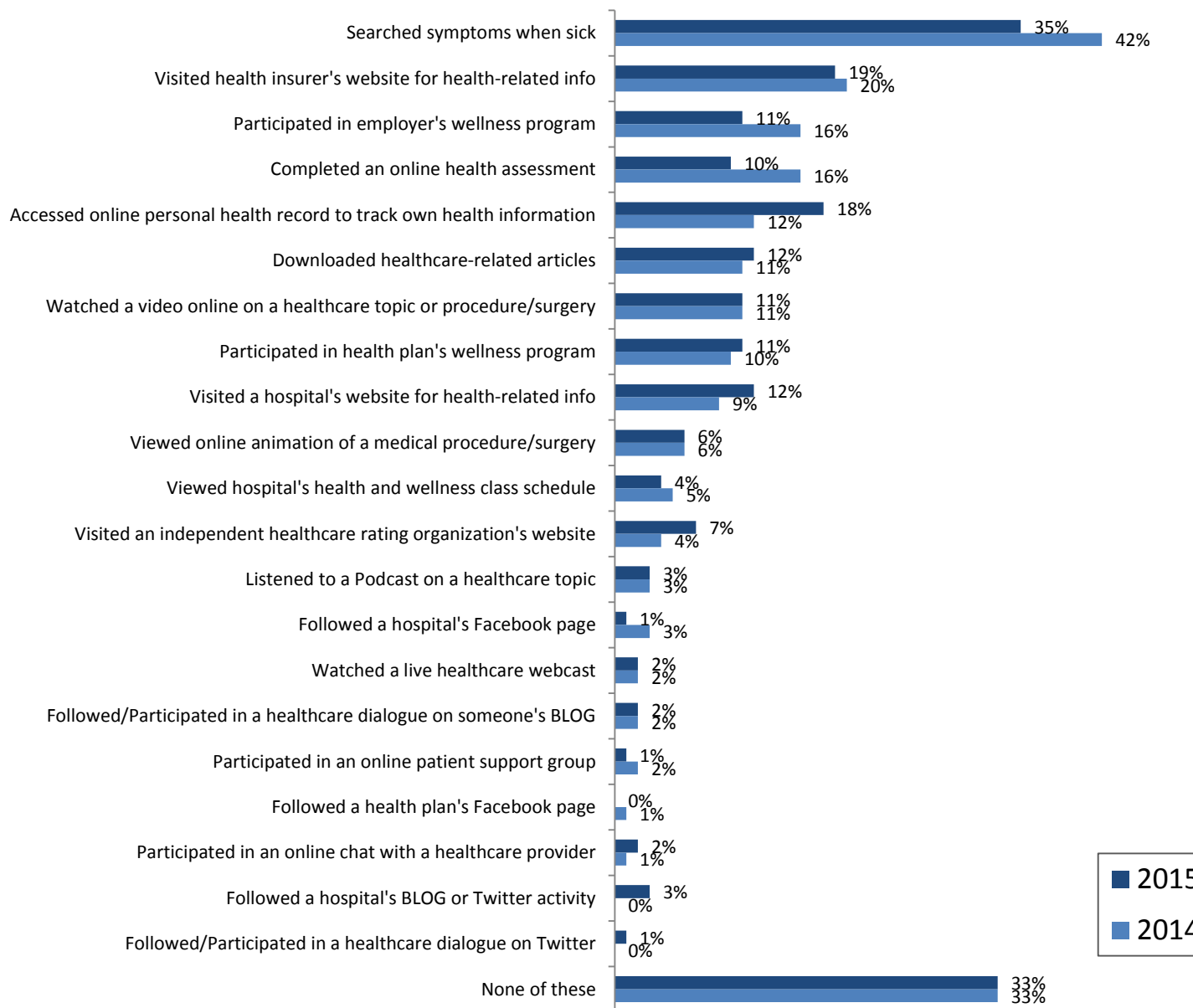
Q23: Besides your physician, which of the following have you sought health-related information from in the past year?

Health Related Information Sought on the Internet



Q24: And which of the following information, if any, have you done online?

Recent Participation in Online Health-Related Activities

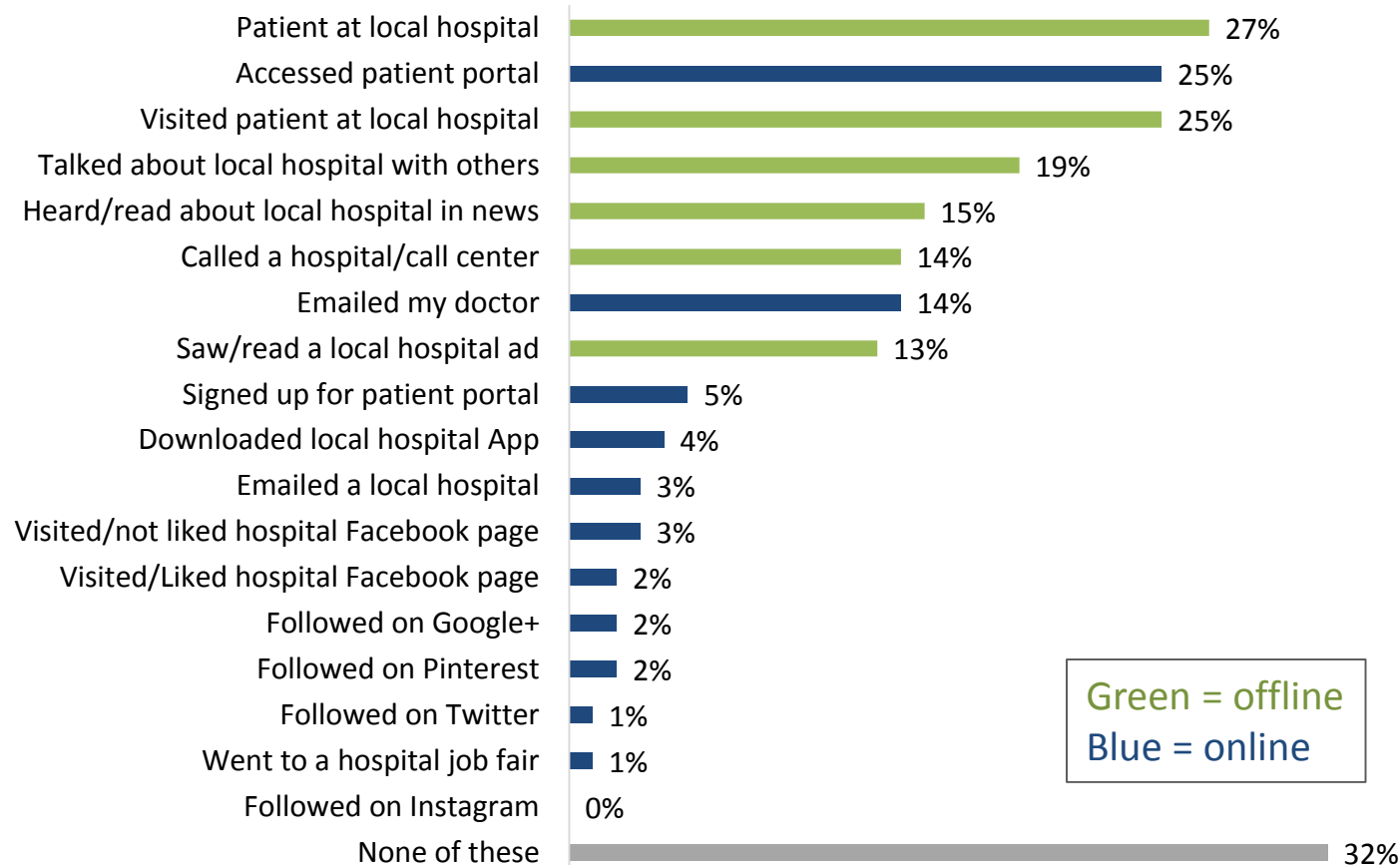


Q25: Which of the following online health-related activities have you participated in over the past few years?



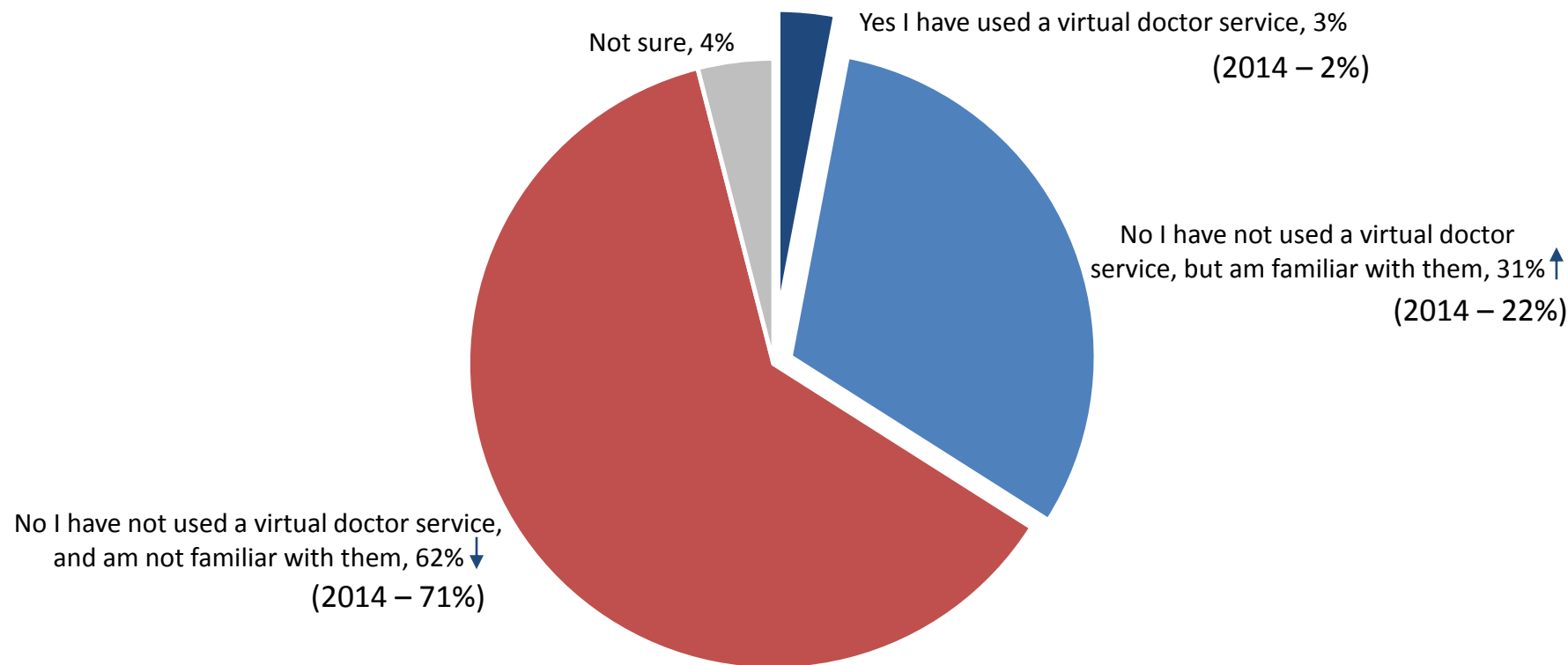
COMMUNICATON METHODS

Brand Contacts with Local Hospitals in Past Year



Q27: In the past year, which of the following interactions, if any, have you had with a local hospital or health system?

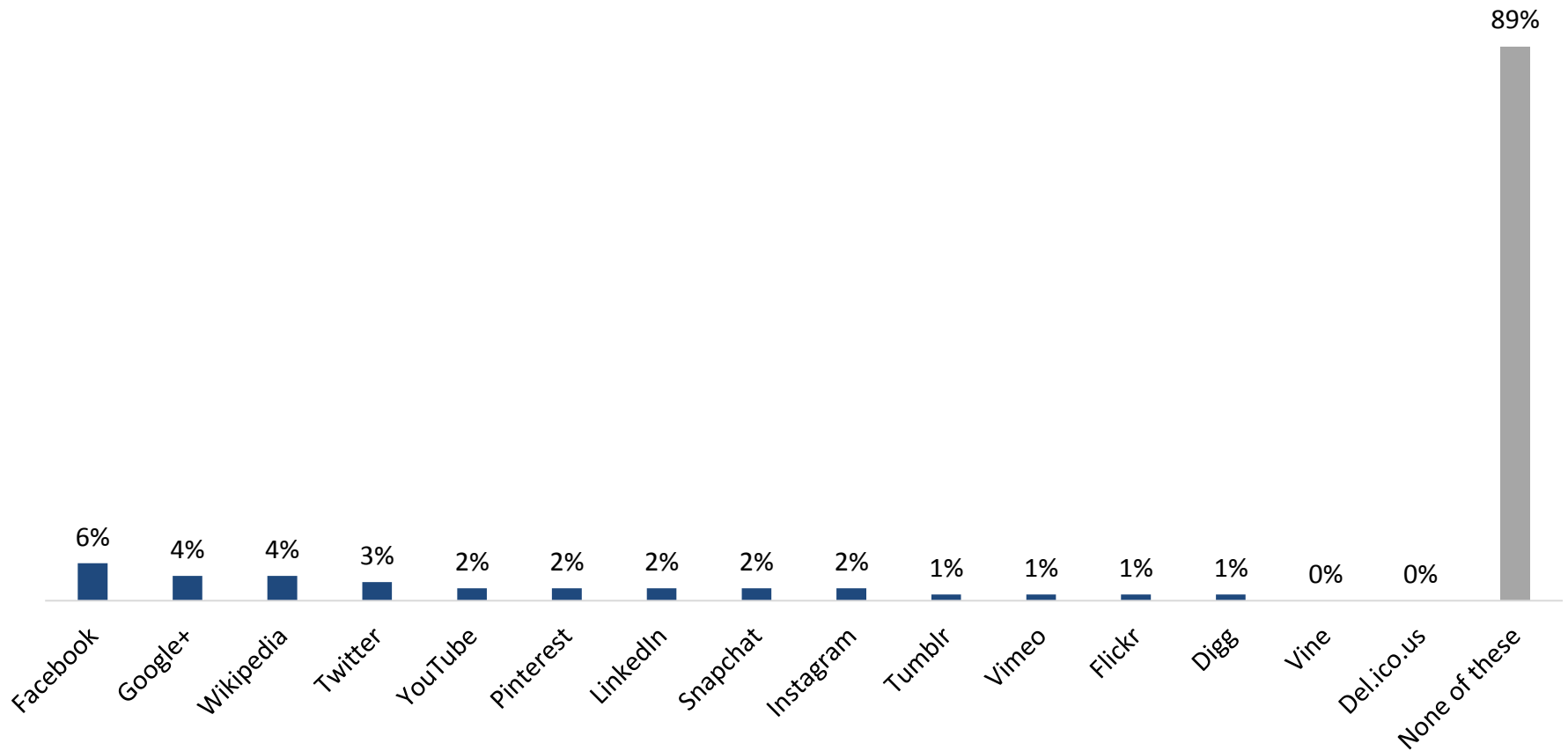
Ever Had a Virtual Doctor Visit?





And use is highest among 30-44 year olds (19%) and African Americans (32%).

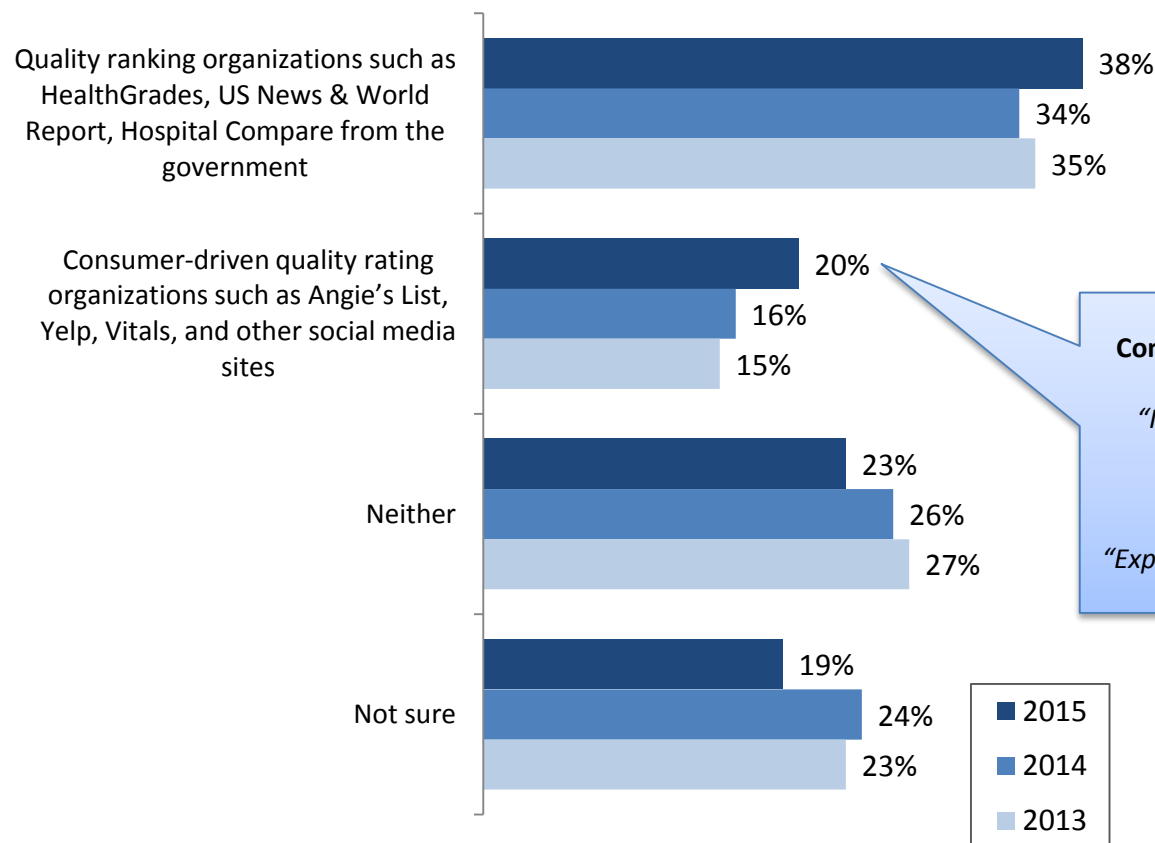
Hospital Interactions Through Various Social Media Sites



Q29: Have you interacted with a local hospital or health system through any of the following social media sites?

ONLINE REVIEWS

Most Useful Information for Hospital Decision-Making



Consumers who found quality ranking organizations more useful cited:

"Trust more than consumer based."

"These rankings have a more in-depth analysis before they came to a conclusion."

"Impartial, and consumer driven rating sites are subject to negative bias."

Consumers who found consumer-driven rating organizations more useful cited:

"I like to learn about bedside manner for the doctors before going to see them."

"They are unbiased and real people, not corporations."

"Experienced answers from first-hand customers."

You read that right...
'customers' not
'patients'

Q30: Now, if you were looking for information on hospital quality to compare different hospitals before you made a decision on which hospital to choose, which of the following sources of quality information, if either, would you more likely find useful in your decision-making?
Q30a: Why would you find {RESTORE Q30 RESPONSE} more useful to you in choosing a hospital?

Going online to a social networking site to rate a doctor or hospital:

6% in 2009

9% in 2011

14% in 2012

12% in 2013

12% in 2014

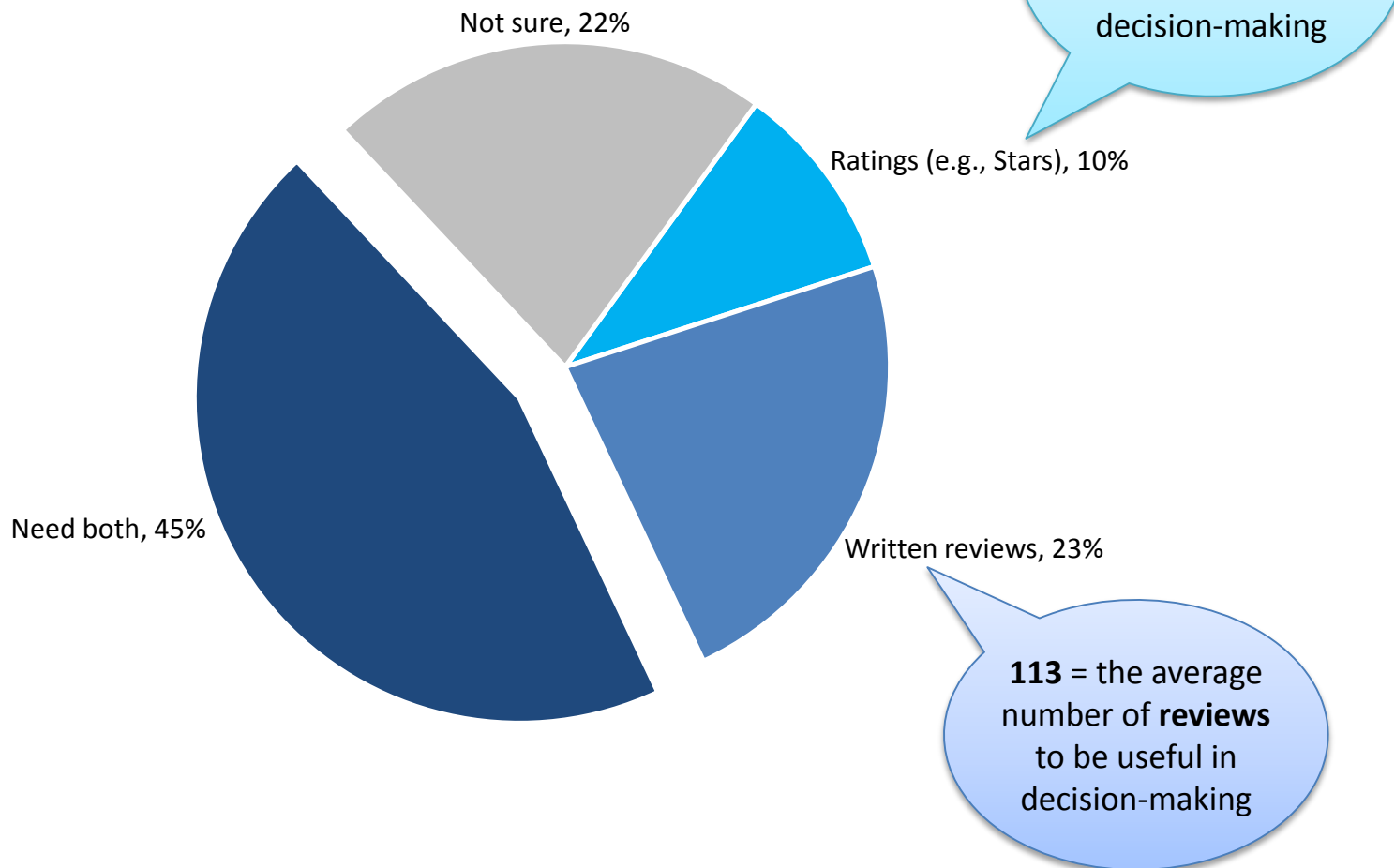
11% in 2015

Going online to a hospital or health system's website to rate the hospital or doctor – **12%**



Q31a: Have you ever gone online to a social networking site and shared your experiences about a doctor or a hospital you recently visited?
Q31b: And have you ever gone online to a hospital or health system website and shared your experiences (good or bad) about a hospital or doctor you recently visited (i.e., gave a 'stars' rating and/or a written review)?

Choosing a Hospital: Ratings vs. Reviews



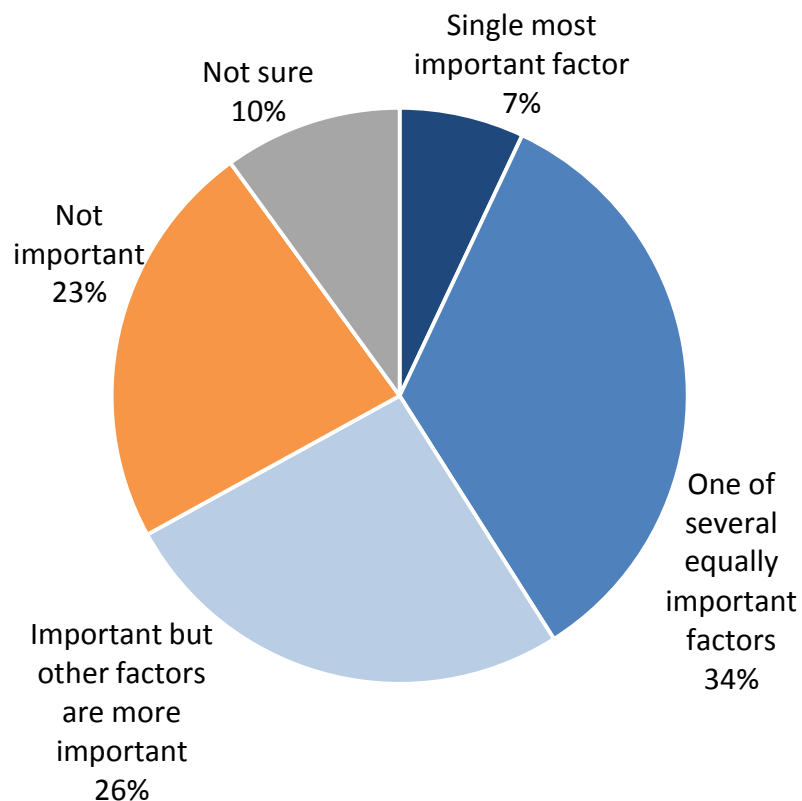
Q32: If you were looking at consumer-based ratings and/or reviews to help you make a decision on which hospital to choose, which would be more helpful to you?

Q33: About how many hospital ratings are needed for you to find them useful in your decision-making?

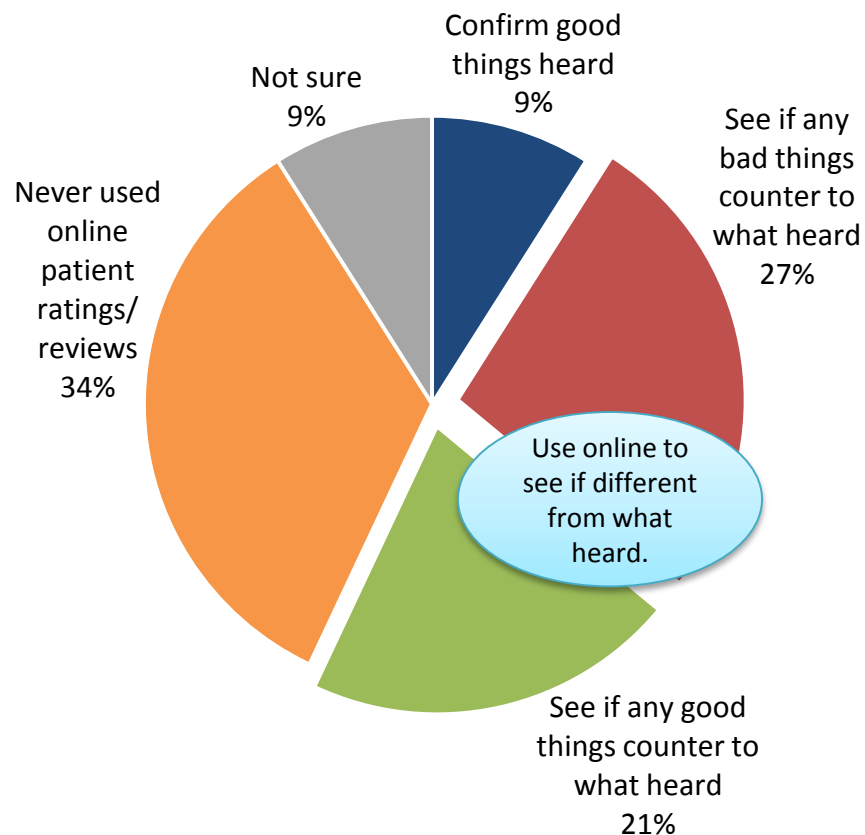
Q34: And about how many hospital reviews are needed for you to find them useful in your decision-making?

Where do ratings/reviews fit into the hospital decision-making process?

Importance of Ratings/Reviews



Use Ratings/Reviews To...

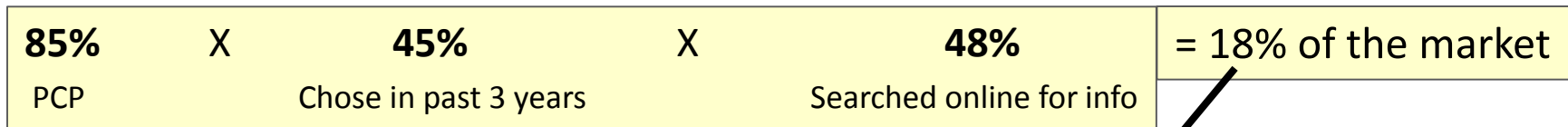


Q35: Where do online patient ratings/reviews fall in importance in choosing a hospital?

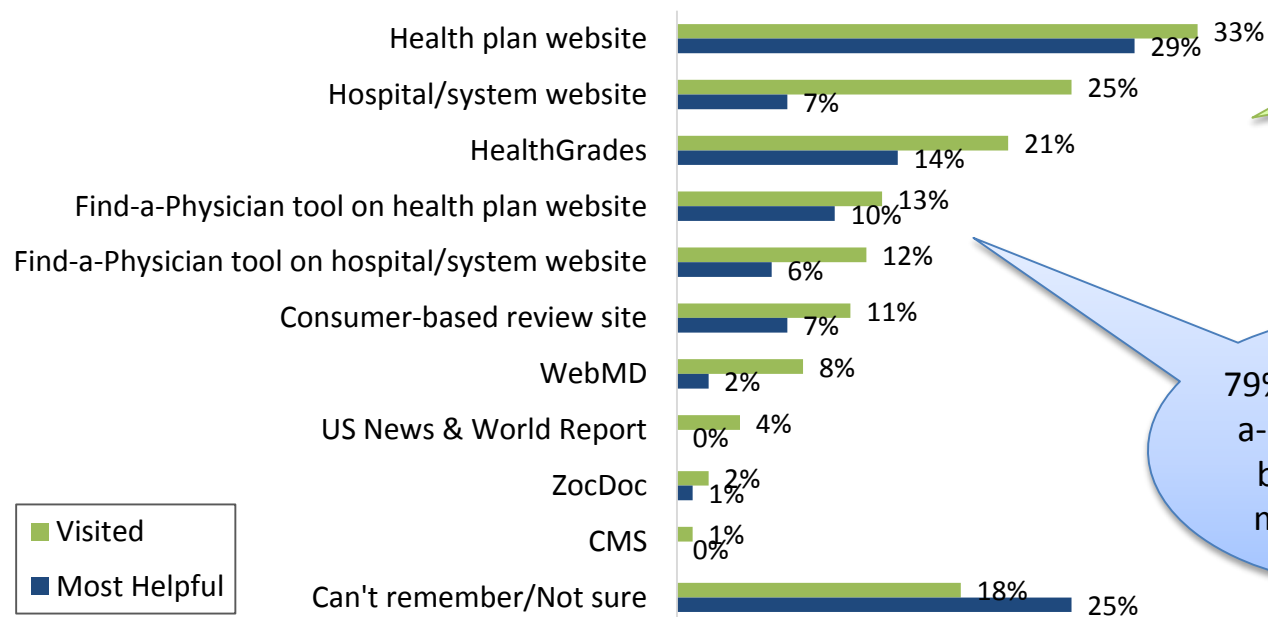
Q36: Do you typically use online patient ratings/reviews to...?



SEARCHING FOR A PHYSICIAN ONLINE



Websites Visited to Find Physician Information



44% started their search with Google.

79% found the Find-a-Physician tool to be important to most important.

Q37: Do you have a primary care physician?

Q38: Did you choose this primary care physician in the past 3 years?

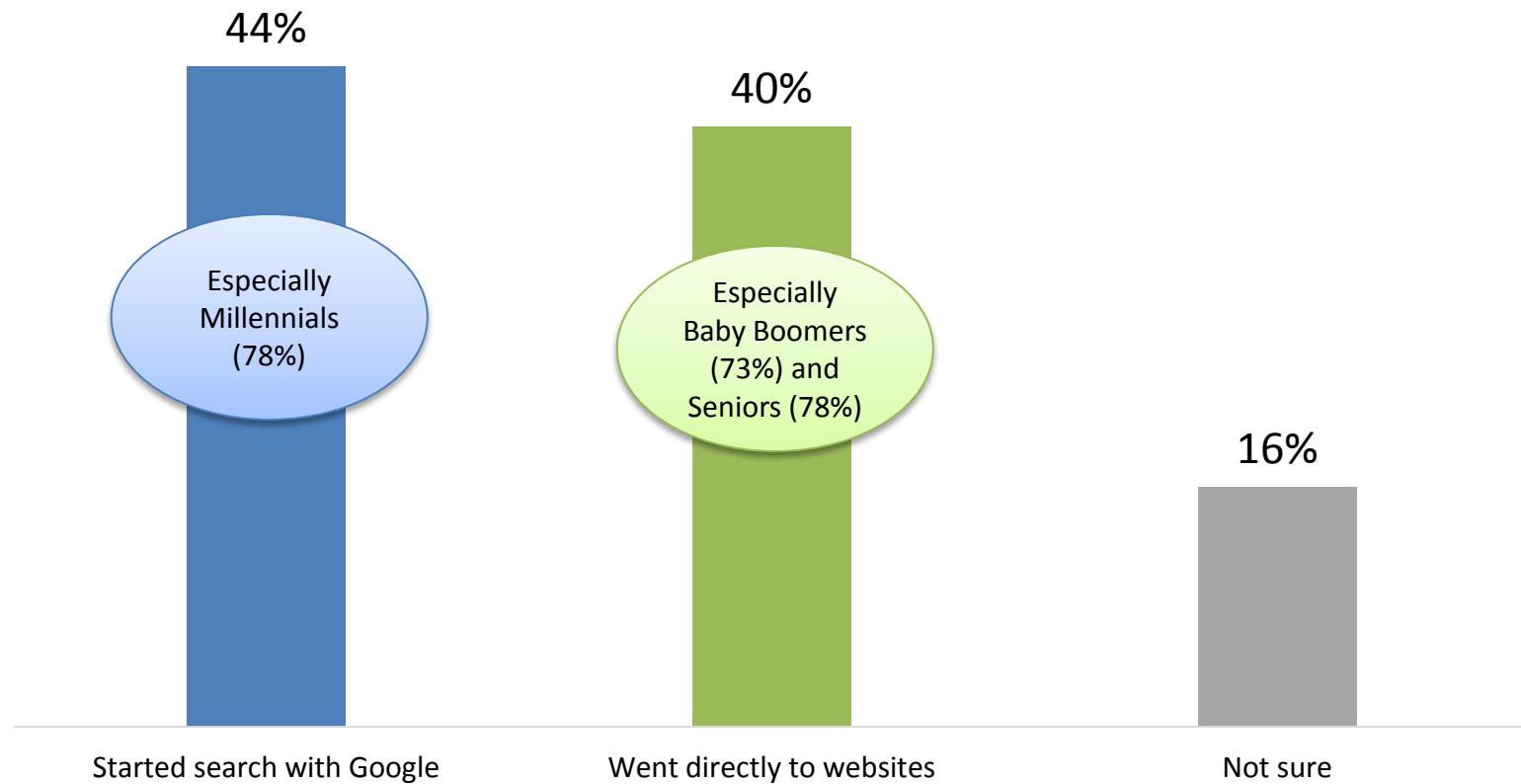
Q39: Did you search online for information about different doctors?

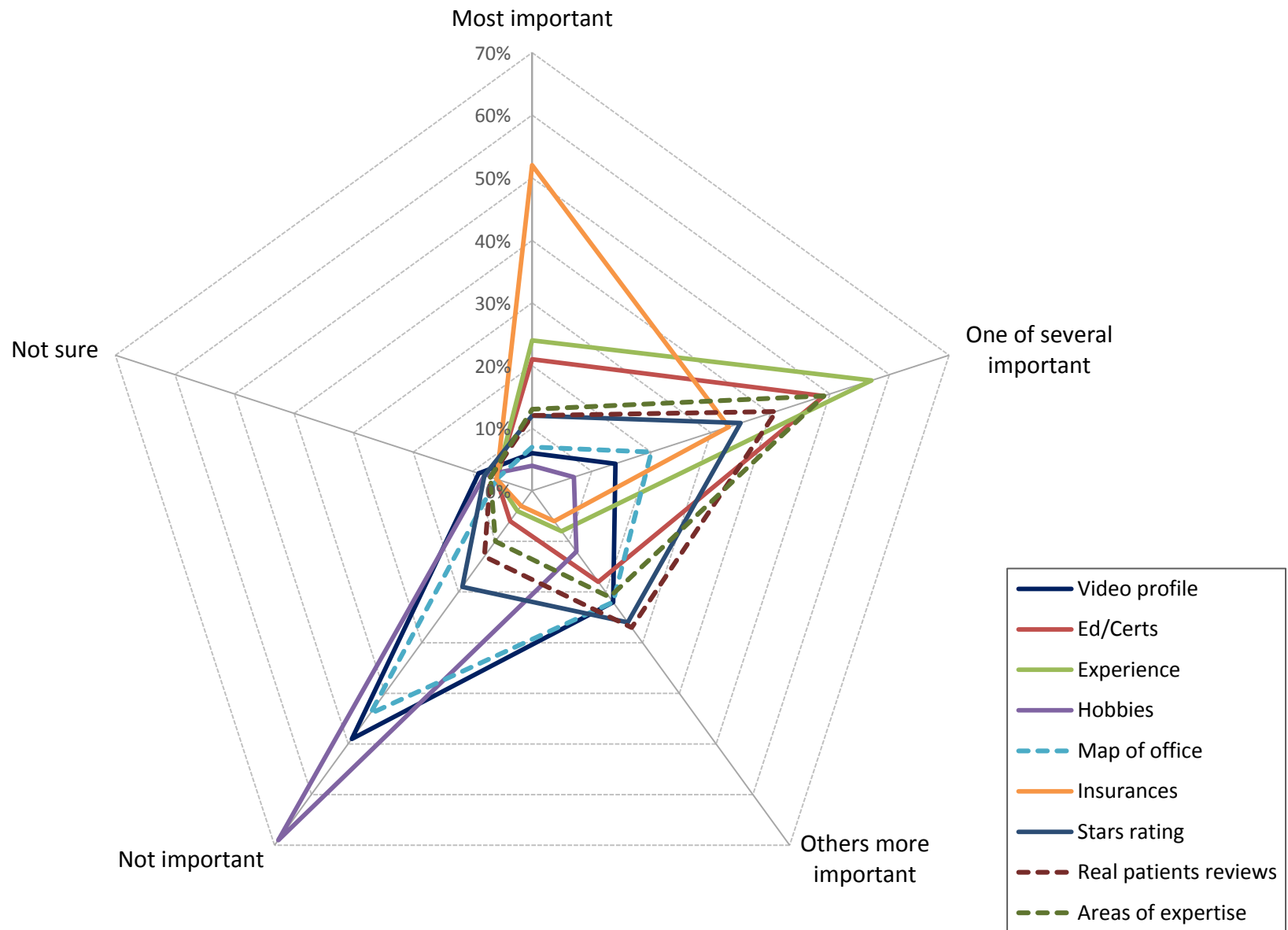
Q40: What websites did you visit to find information about different doctors to choose?

Q41: Which of these websites, if any, was most helpful in your choice of a primary care physician?

Q42: When you consider all the factors you included in your decision-making for a new primary care physician, how important was the find-a-physician tool in your decision-making?

How Started Online Physician Search (18% of Americans)





Q44: Find-a-physician tools provide various types of information about different physicians. How important are the following types of information for you in finding a Find-a-Physician tool useful?

Comparing Net Promoter Score (NPS) to
Klein & Partners' Recommend Question Wording

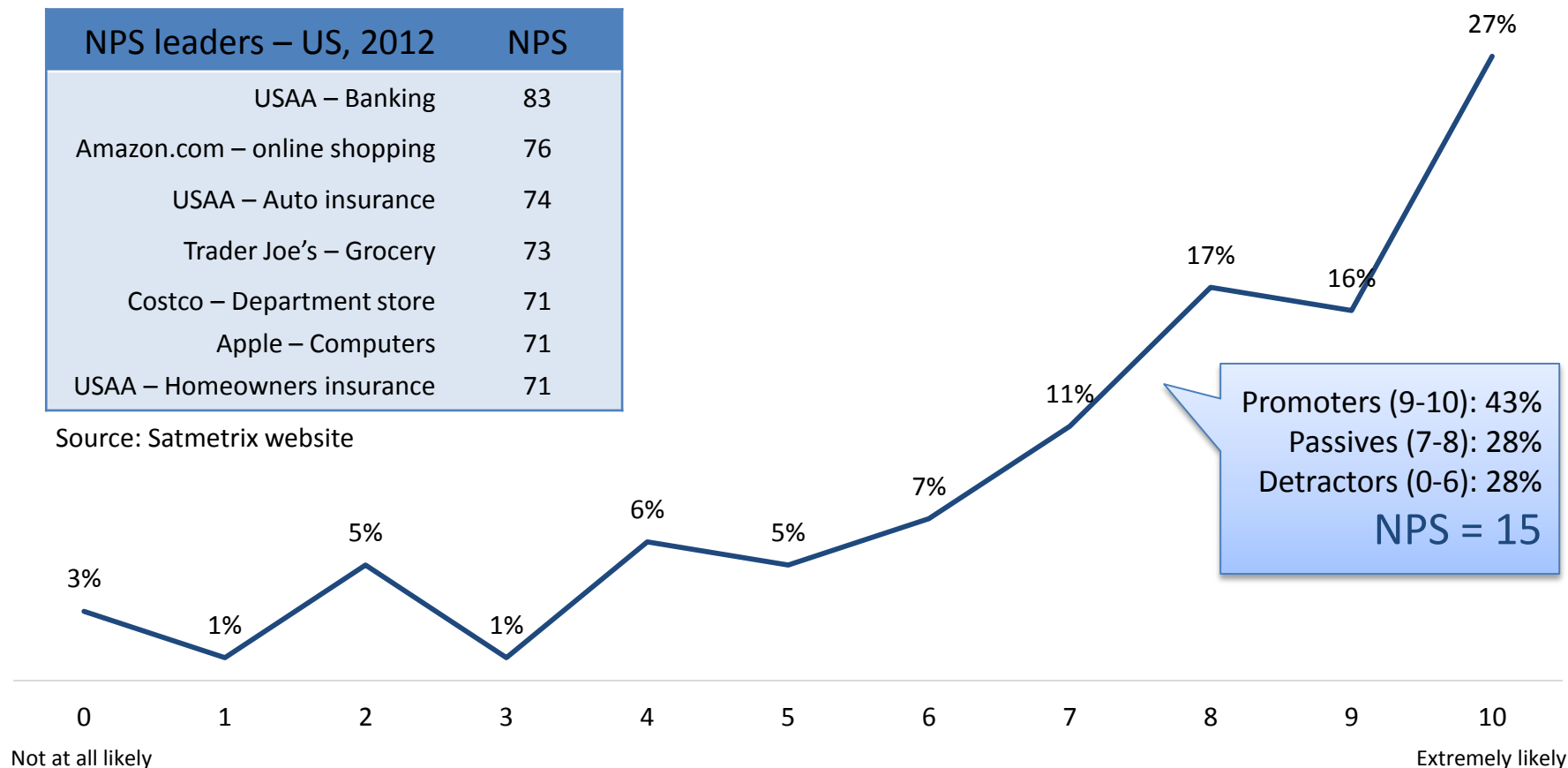
ADVOCACY

Likelihood to Recommend Hospital – NPS

(Among the 54% with a recent hospital experience)

NPS leaders – US, 2012	NPS
USAA – Banking	83
Amazon.com – online shopping	76
USAA – Auto insurance	74
Trader Joe's – Grocery	73
Costco – Department store	71
Apple – Computers	71
USAA – Homeowners insurance	71

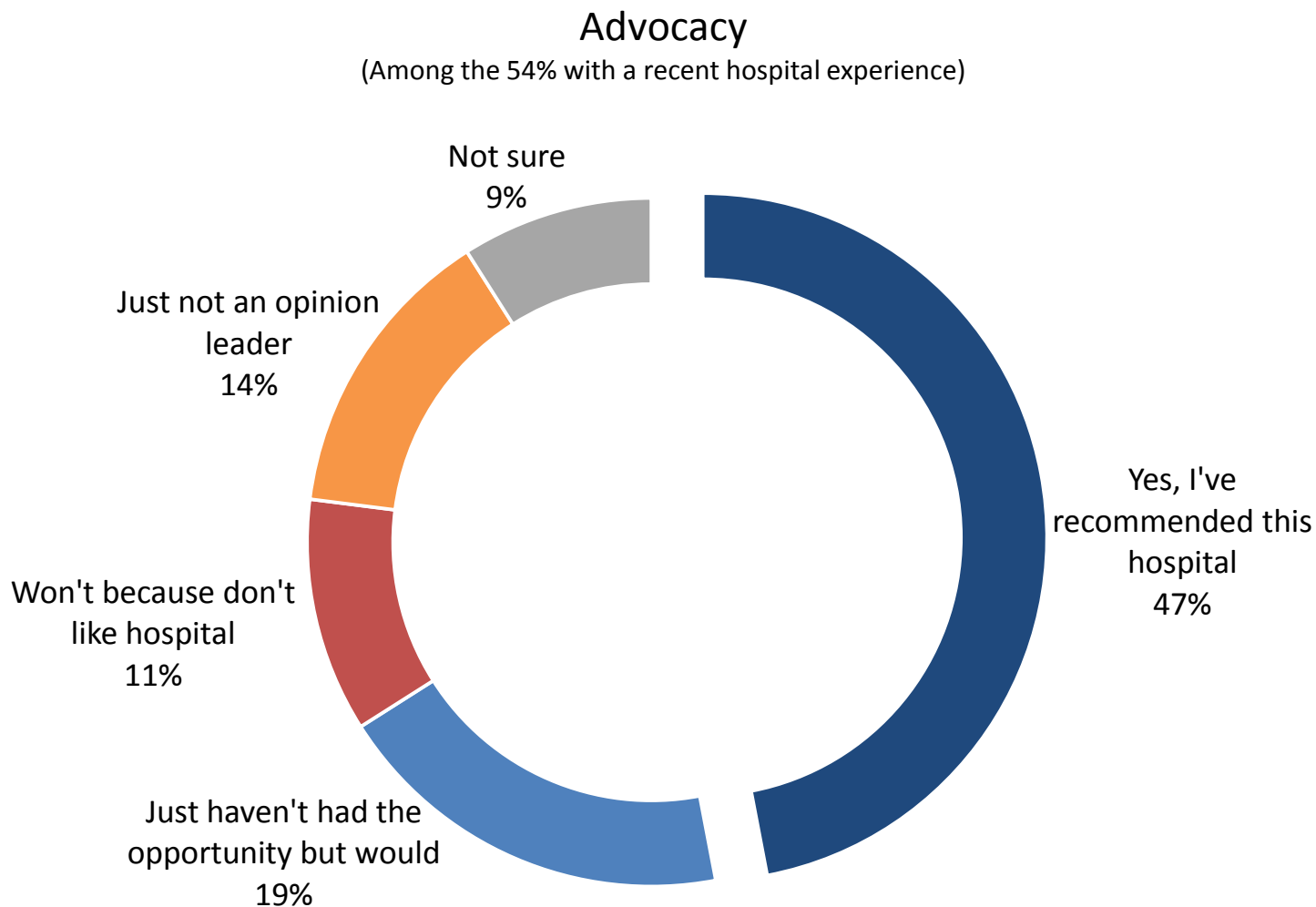
Source: Satmetrix website



Q45: Have you or has anyone in your immediate household whose healthcare you are responsible for been treated at a hospital in the past 2 years for inpatient, outpatient, or emergency care?

Q46: Using a scale of 0-10 where 0 means 'not at all likely to recommend' and 10 means 'extremely likely to recommend,' please indicate how likely you would be to recommend this hospital to a friend or family member.

Note: Total does not equal 100% due to rounding.



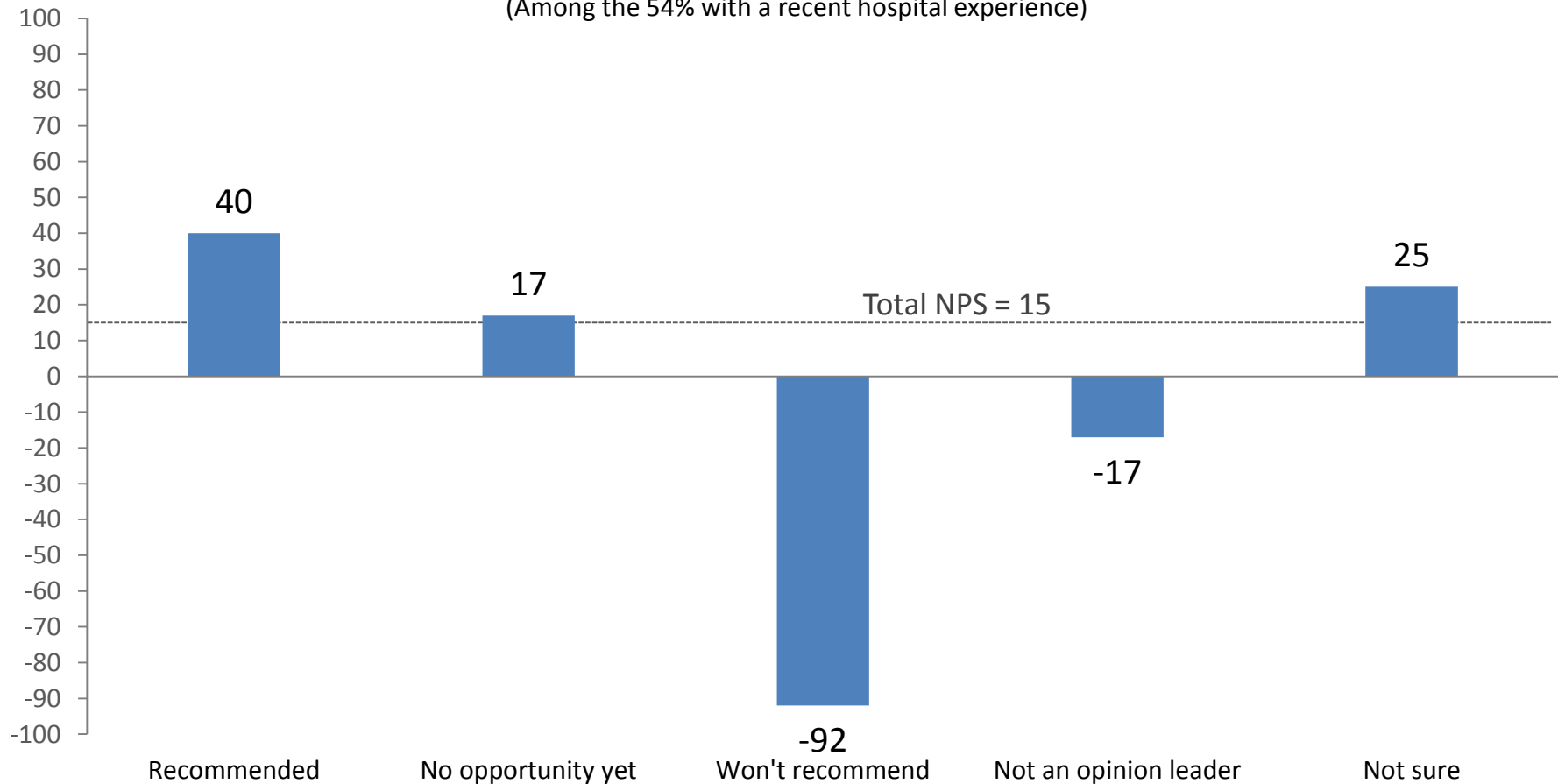
Q45: Have you or has anyone in your immediate household whose healthcare you are responsible for been treated at a hospital in the past 2 years for inpatient, outpatient, or emergency care?

Q47: Have you ever recommended this hospital to anyone?

Q48: Have you not recommended this hospital because...?

NPS Based on Recommendation Behavior

(Among the 54% with a recent hospital experience)



Q45: Have you or has anyone in your immediate household whose healthcare you are responsible for been treated at a hospital in the past 2 years for inpatient, outpatient, or emergency care?

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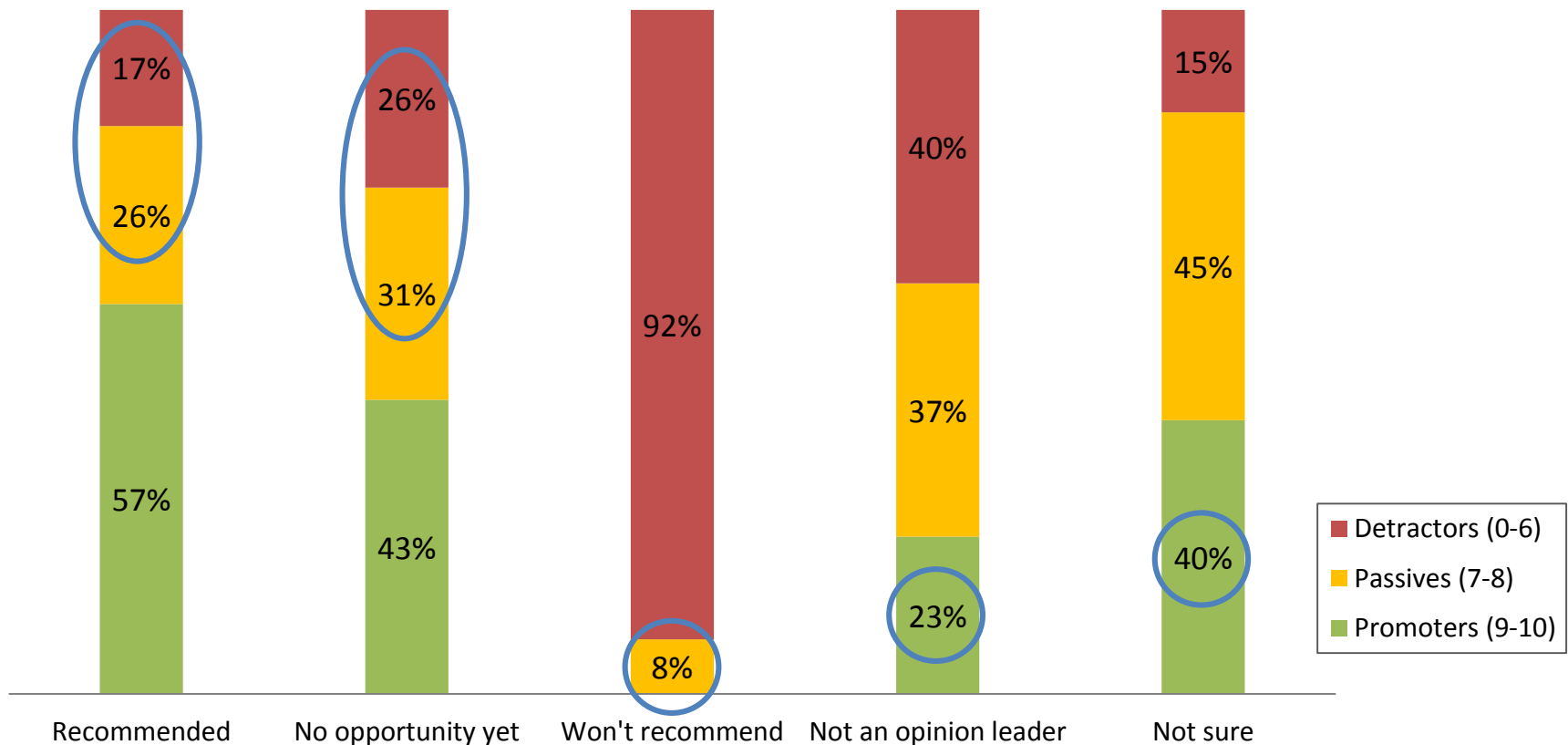
Q47: Have you ever recommended this hospital to anyone?

Q48: Have you not recommended this hospital because...?

This is why the
NPS is not a
reliable measure
of Advocacy!

NPS Based on Recommendation Behavior

(Among the 54% with a recent hospital experience)



Q45: Have you or has anyone in your immediate household whose healthcare you are responsible for been treated at a hospital in the past 2 years for inpatient, outpatient, or emergency care?

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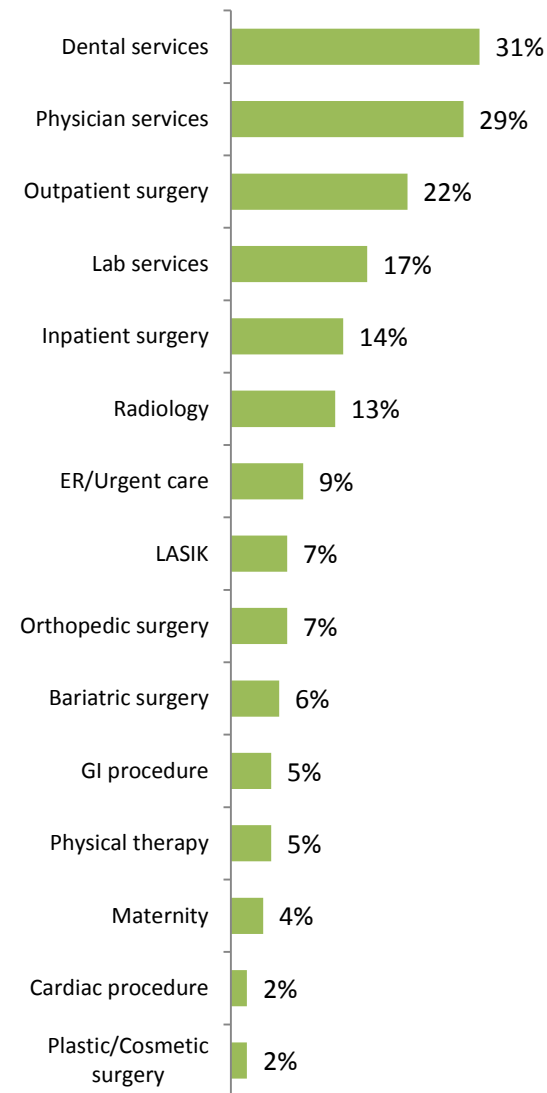
Q48: Have you not recommended this hospital because...?



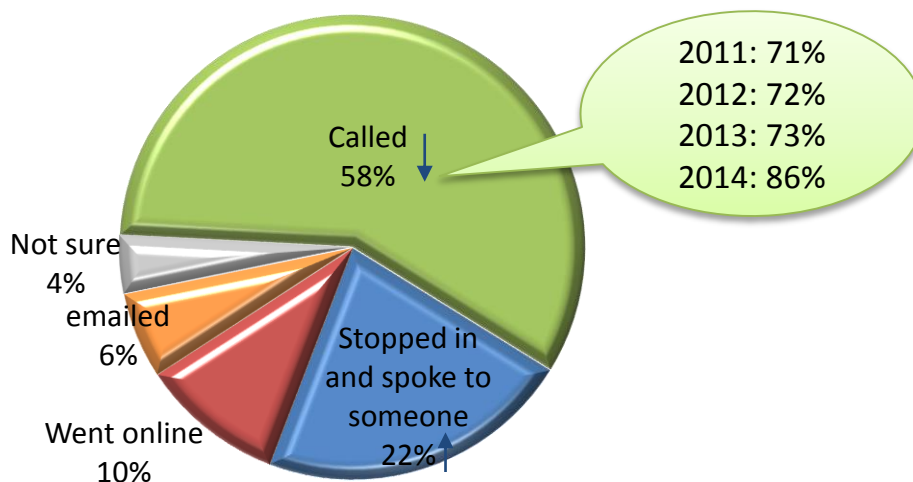
PRICE SHOPPING

	2009	2010	2011	2012	2013	2014	2015
Households that have contacted a healthcare organization to ask the price for a specific visit, test, treatment, or surgery	32%	32%	22%	28%	24%	16%↓	24%↑
Chose the least expensive provider for one of these healthcare cases	41%	31%	31%	33%	24%	44%↑	48%
% of the total patient market →	13%	10%	7%	9%	6%	7%	12%

Health Service Price Shopped



How did you check on pricing?



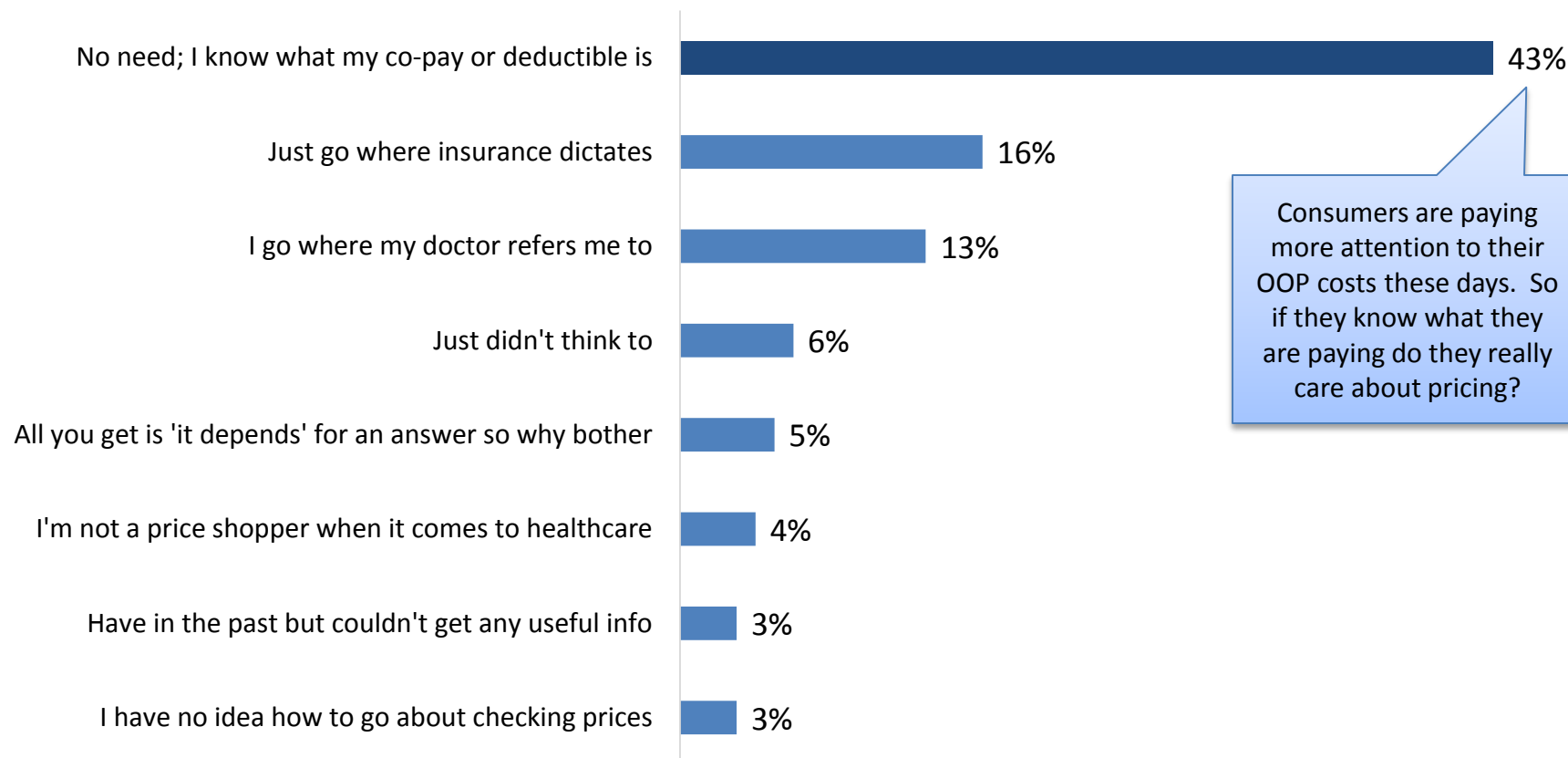
Q50: Within the past year, did you or did a member of your immediate household contact any healthcare organization, hospitals, or physician offices to ask about the price for a specific visit, test, treatment, or surgery? IF YES...

Q51: How did you check on pricing?

Q52: What type of health service did you ask about pricing for?

Q53: Did you end up choosing the least expensive provider?

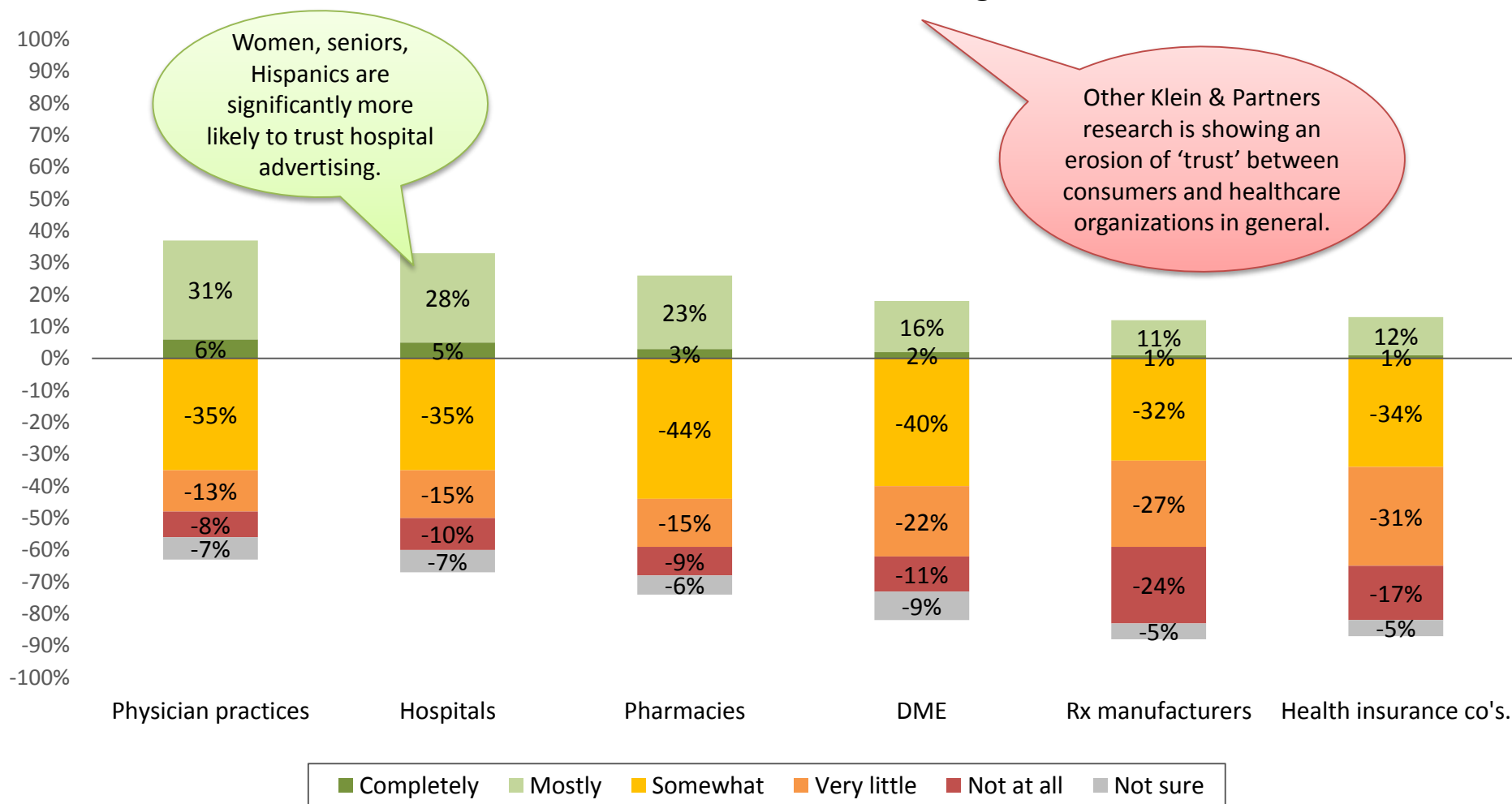
Reasons for Not Checking Prices (Among the 76% that did not check prices)





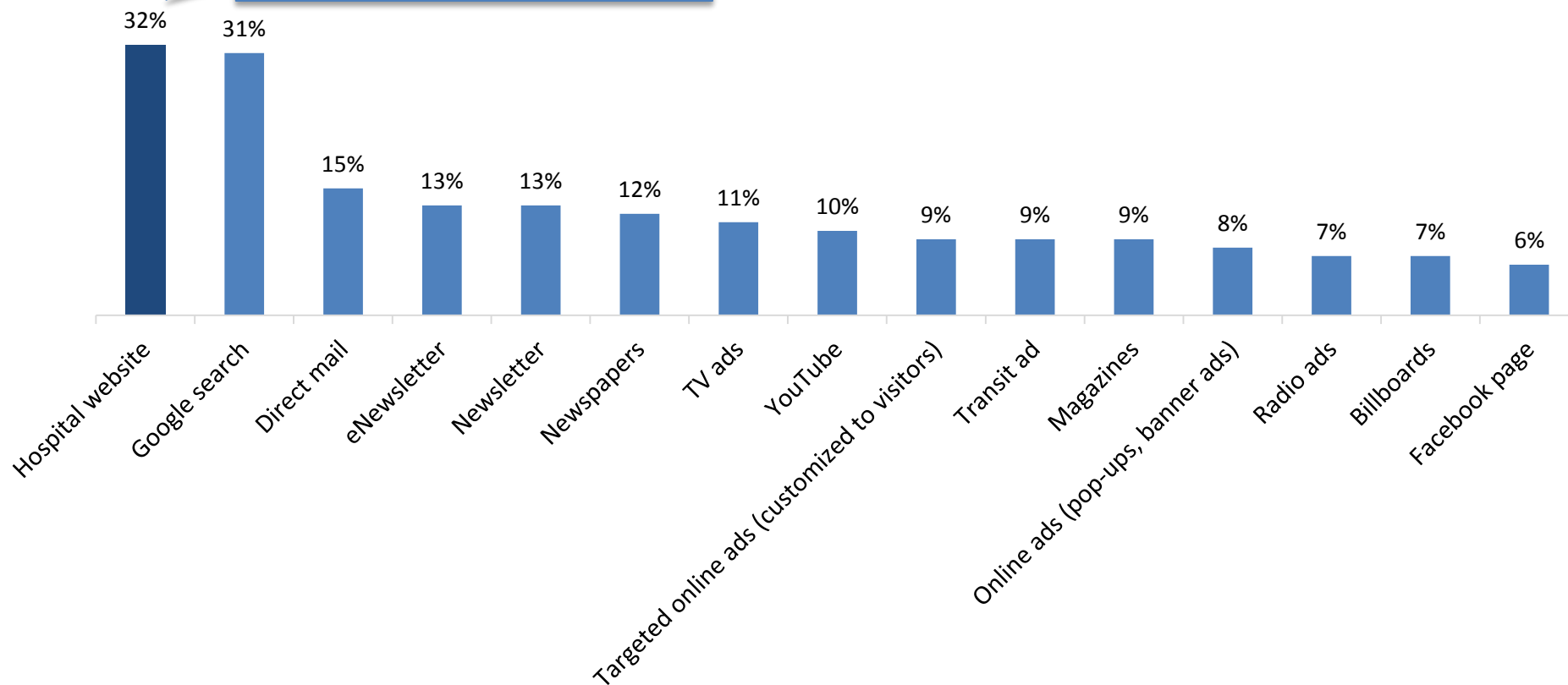
CONSUMER PERCEPTIONS OF HEALTHCARE ADVERTISING

How Much Do You Trust Advertising From...?



This Local Healthcare Advertising Medium is 'Very Useful' to Consumers

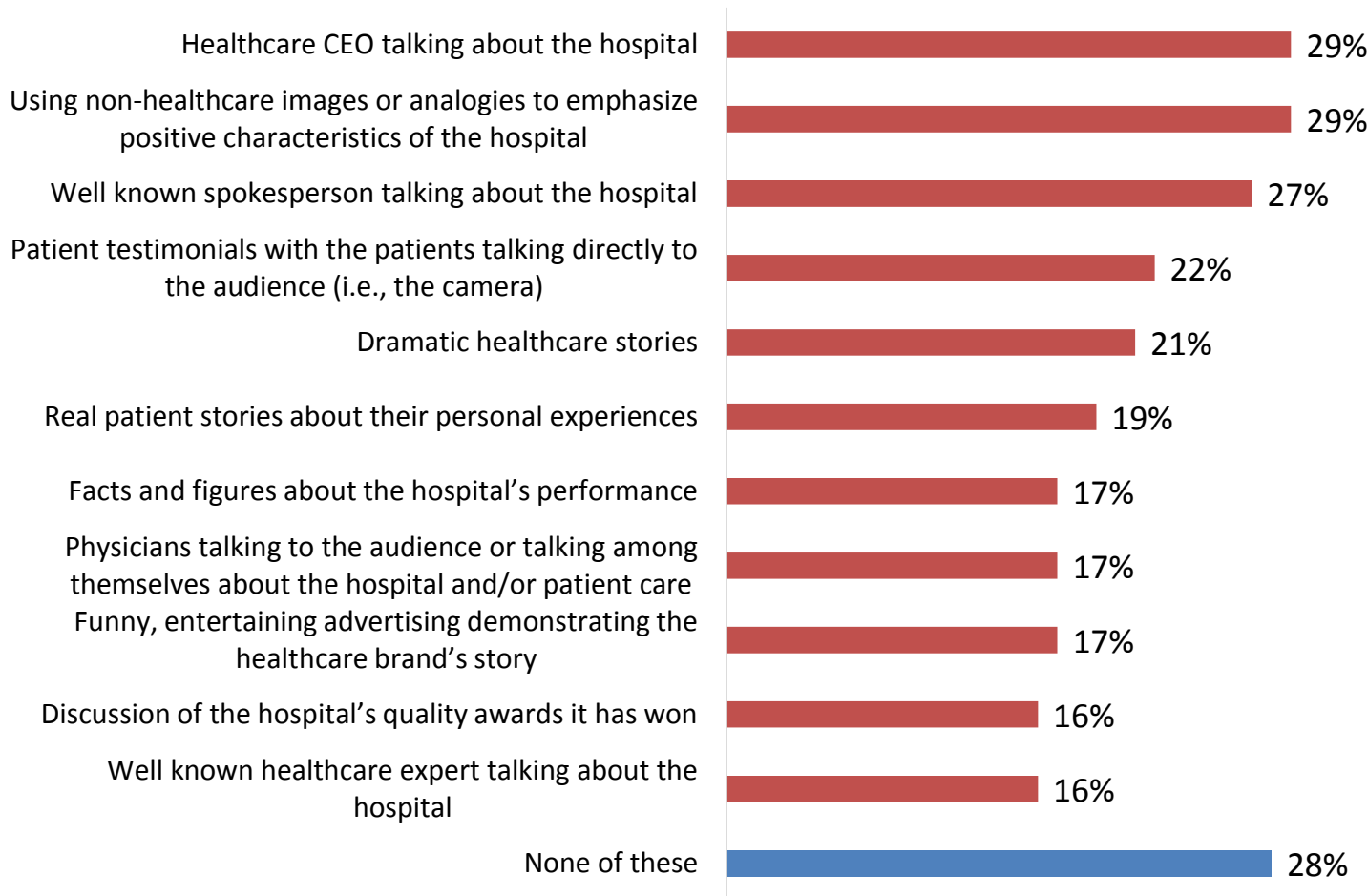
Your website is a 'digital brand dialogue' with your stakeholders. It is a key brand relationship building tool.



Q55: When you think of healthcare advertising such as for area hospitals and health systems that you may have seen or read over the past year, how useful to you are the following forms of healthcare advertising in terms of you learning what a healthcare organization has to offer?

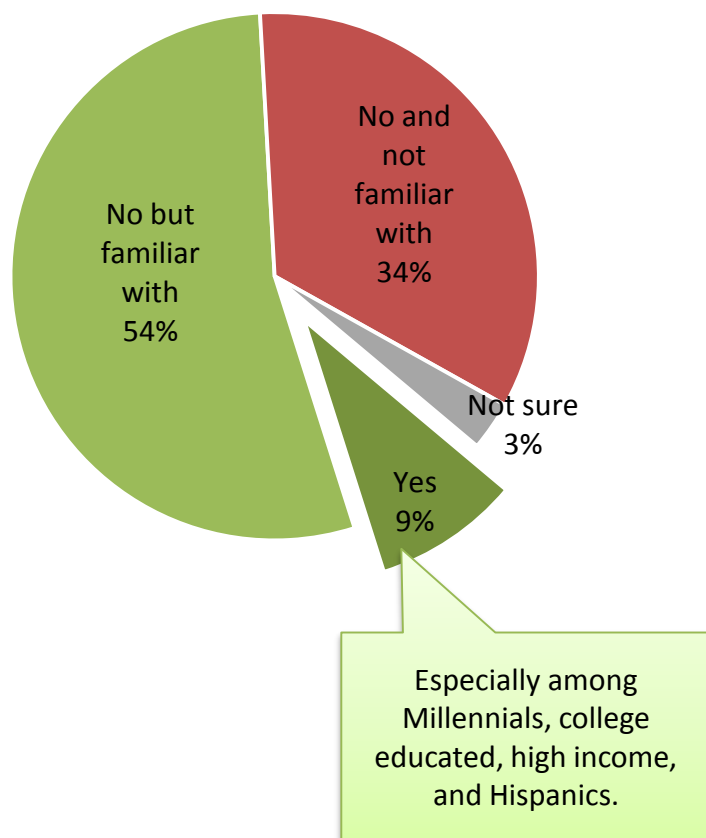
Storylines Dislike Enough to Tune Ad Out

More Tune Out

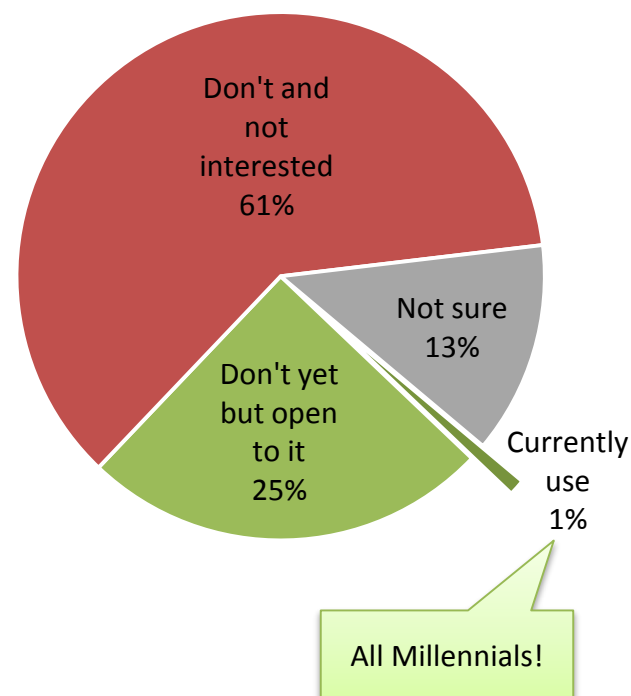


Q56: Next, we have a question about healthcare TV advertising. All TV ads try to convey their message using a variety of themes or story-telling methods. If you saw a TV ad for a local healthcare organization, which of the following themes do you DISLIKE enough that it would cause you to tune that ad out?

Use of/Familiarity with Mobile Wallet Apps



Use of Mobile Wallet Apps to Pay for Healthcare Services

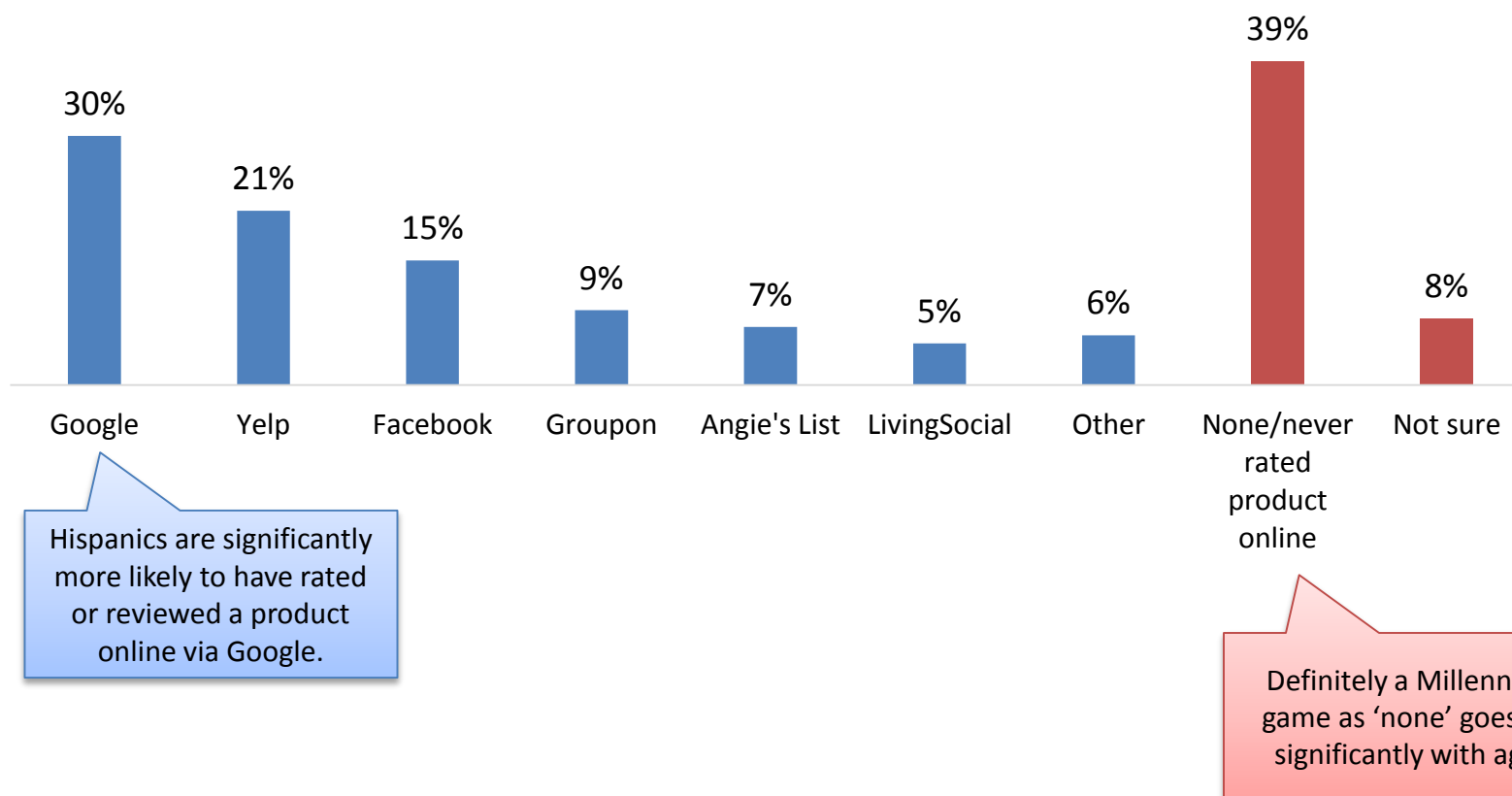


Q57: Do you use a digital or mobile wallet App such as Apple Pay or Google Wallet to pay for anything?

Q58: Do you or would you pay for any healthcare services using a mobile wallet App (e.g., pay a premium, co-pay, etc.)

Use of any online review sites to rate/review any product or service

Rated/Review Any Product Online





AMBULATORY CARE SCHEDULING PREFERENCES

Preferred days/times to schedule outpatient surgery

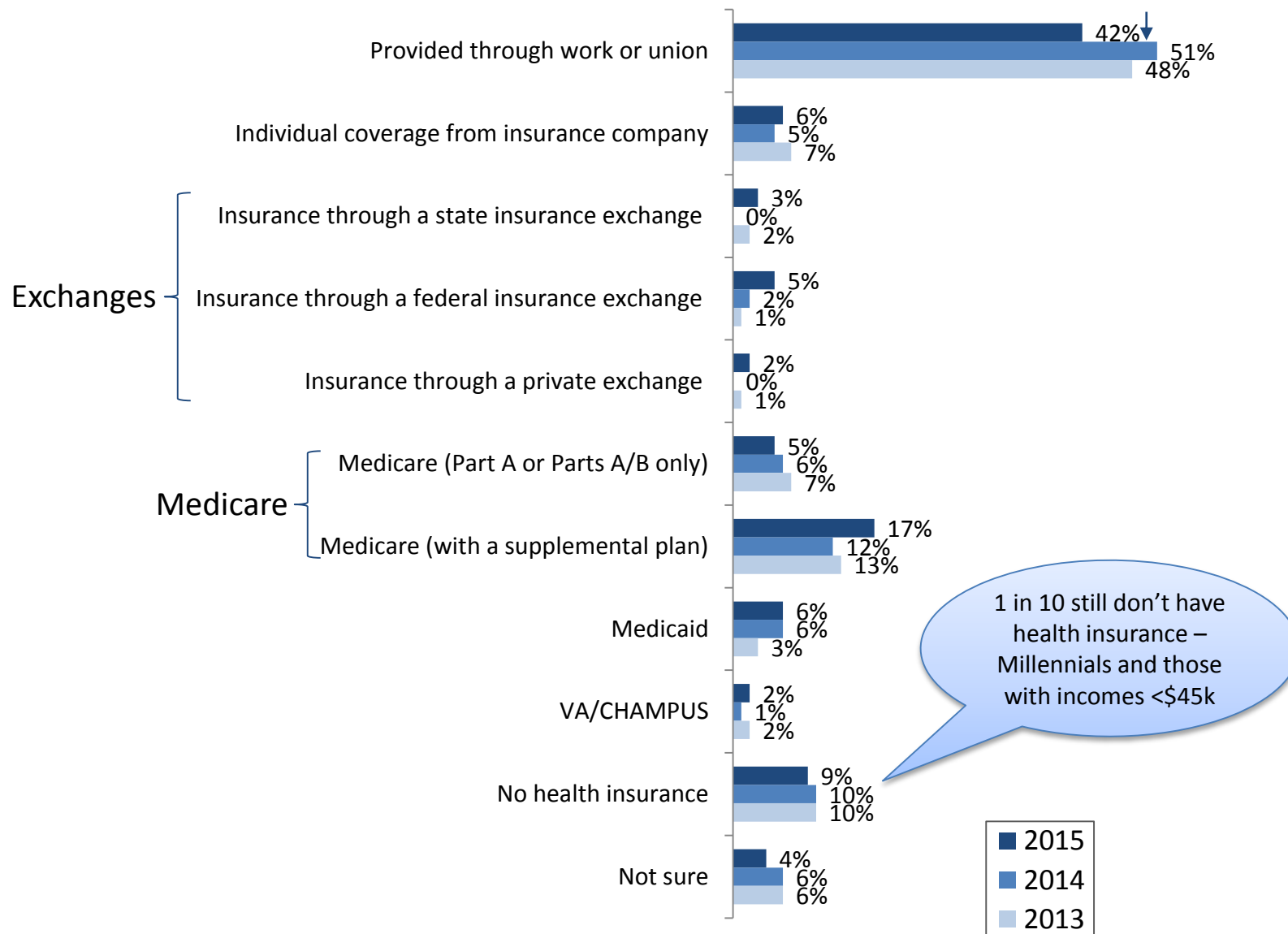
Ranking	Weekday day hours	Weekday evening hours	Saturday hours	Sunday hours	Not sure
(Most preferred) 1	54%	17%	10%	1%	19%
2	10	37	24	11	
3	5	17	42	17	
(Least Preferred) 4	13	10	7	52	

Q60: Assume a new outpatient surgery center opened up in your area that you wanted to use for outpatient surgery you needed to have. And let's assume you had to schedule an appointment with the specialist before the surgery. Look at the list of days/times below and rank order your preference for scheduling that appointment with this specialist before your outpatient surgery where 1 is your most preferred time and 4 is your least preferred time.



HEALTH INSURANCE

Current health insurance



The digital healthcare consumer is here... in some ways.

KEY TAKE-AWAYS

- 1) Two thirds of Americans searched for health-related information in the past year. Chrome is the browser of choice, but there is more parity in devices used – whether PC, laptop, or mobile device.
- 2) Two-thirds of health-related searches start with Google.
- 3) Three in ten Americans have been to a hospital website in the past three months. *Your website is a 'digital brand dialogue' and instrumental in developing a strong brand relationship with consumers. A bad website experience will damage your brand overall.*
- 4) 'Mobile friendly' is important for your website. *All indications are it will continue to grow in importance in the coming year.*
- 5) Three to four clicks to find what they are looking for ... after that they are outta there!
- 6) Page loads – you only have a few seconds.
- 7) Videos – keep it to four minutes or less.
- 8) Scheduling Apps – a "must-have" not a "nice-to-have."
- 9) WebMD remains the most popular health-related website destination for health-related information/content.
- 10) Checking lab tests is most popular when it comes to health-related online activity.
- 11) Accessing the EMR is as common as being a patient at a hospital. EMR also is a must-have not a nice-to-have.
- 12) Gen Xers (and not Millennials) and African Americans are most likely to have a Wearable.

- 13) Visits to hospital websites is up two and a half times from just a year ago (11% up to 29%). Your websites are getting far more visitors every year.
- 14) Increasingly, consumers want to be able to “transact business” with a healthcare organization online (e.g., refill prescriptions, pay bills, etc.) – not just lookup information.
- 15) Consumers still trust independent rating organizations (e.g., Healthgrades, Hospital Compare, etc.) over consumer-driven rating organizations (e.g., Yelp, Angie’s List, etc.).
- 16) More than one in ten folks has gone online to a hospital website to rate the hospital or a doctor.
- 17) How many ratings/reviews do people want to see about a hospital to make those ratings/reviews useful to them? → ~100.
- 18) People are using online ratings/reviews to see if they learn something different from what they already heard/learned offline.
- 19) Google is the most used online review site (for any product or service) followed by Yelp and Facebook.
- 20) Millennials tend to start a physician online search with Google while Baby Boomers and Seniors tend to go directly to a related website.
- 21) Health insurer find-a-physician tools are more useful to people than hospital find-a-physician tools.
- 22) On the find-a-physician tool, insurance is by far the most important information element followed by experience, education and certifications, areas of expertise, and real patient reviews/ratings.
- 23) Mobile wallet Apps are here, especially among Millennials (but not really in healthcare yet).

- 1) The ACA has given rise to the healthcare ‘customer.’ As most folks are paying more now for health insurance than in the past, they have ‘more skin in the game’ and consequently their expectations have increased dramatically. Service comparisons are more retail-oriented.
- 2) What’s more, the ACA has made most folks feel frustrated, confused, and skeptical about today’s healthcare system.
- 3) Even after implementation of the ACA, one in ten Americans still don’t have health insurance.
- 4) Trust in hospitals is very low but health insurers and pharmaceutical companies still lead the race to the bottom!
- 5) Consumers think hospitals make a lot of money – how does a profit margin around 50% sound? (Maybe this is why they don’t trust you.)
- 6) Net Promoter Score (NPS) is not a stable predictor of advocacy. Even those who have actually recommended a hospital (i.e., actual behavior) gave widely varying responses to the behavioral intention question of – ‘how likely are you to recommend this hospital?’ For example, 26% of those who actually recommended a hospital gave a 7-8 likelihood to recommend rating for that same hospital and 17% who recommended a hospital gave a 0-6 likelihood to recommend rating for that same hospital.

- 7) Healthcare services price shopping is back up to one in four. And among those who did price shop recently, nearly half (48%) chose the cheapest option. Among those who haven't price shopped, most don't feel the need to because they know exactly what their co-pay and/or deductible is – consumers are paying more attention to their OOP costs these days. So, if they know what they are paying do they really need to price shop?
- 8) There is very little trust in healthcare advertising, especially for DME, Rx, and health insurers.
- 9) Hospital websites are seen as the most useful form of healthcare advertising - your website is a 'digital brand dialogue' with your stakeholders. It is a key brand relationship building tool.
- 10) Don't let your CEO be in your ads!

If you would like additional information regarding this study, please contact:

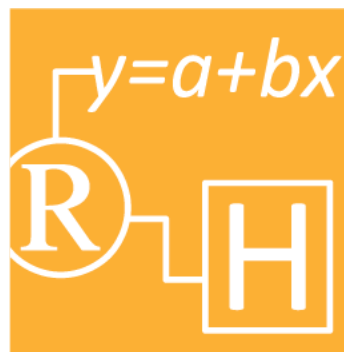
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