What Are Today's Healthcare Consumers Thinking?

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Online survey

n=1,018 → +/-2.6% at the 90% CL

(Data were weighted by geography, age, income, ethnicity, education, and sex)

Fielded: June 14 – 27, 2023

National random sample among heads-of-household who are the health care decision-maker for the home

Note: Arrows (↑↓) and letters (e.g., A, B, C) indicate a statistically significant difference between those two data points

COVID-BRAIN

COVID-brain is still impacting about three in ten adults and continues to have a significantly greater impact on Gen Z and Millennials

Memory

I am having trouble remembering simple things

25% (27% in 2022)

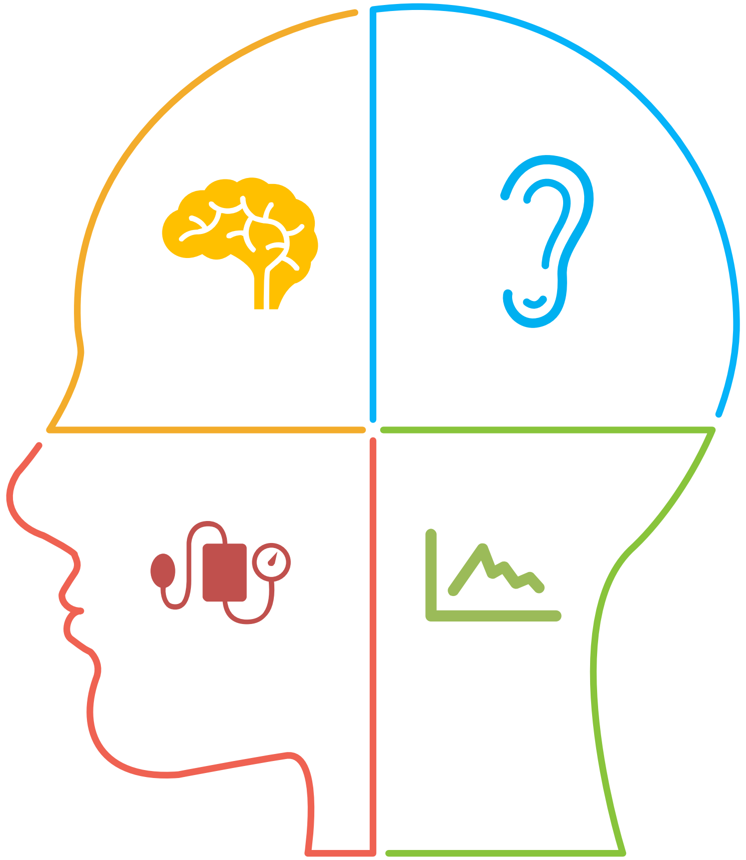
Gen Z: 33%, Millennials: 34%

Attention Span

I find it harder to concentrate and pay attention to things

29% (29% in 2022)

Gen Z: 44%, Millennials: 41%



Patience

I find myself losing my patience easier than before

30% (33% in 2022)

Gen Z: 44%, Millennials: 35%

Brand Linkage

Even if I remember an advertisement, I find it harder to remember who the company was

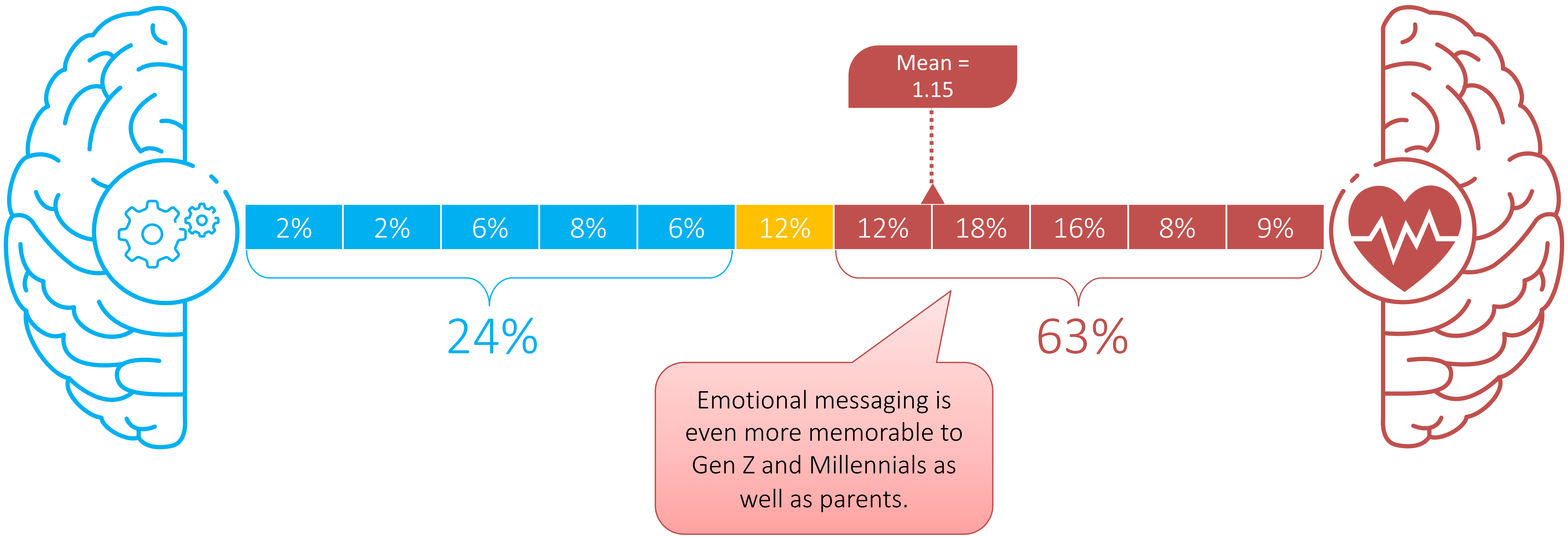
33% (34% in 2022)

Gen Z: 44%, Millennials: 44%

Q70: For the next question, please agree or disagree with each statement as it applies to how you feel now compared to a couple years ago before COVID.
Note: % Strongly Agree/Agree shown.

Messaging must be…

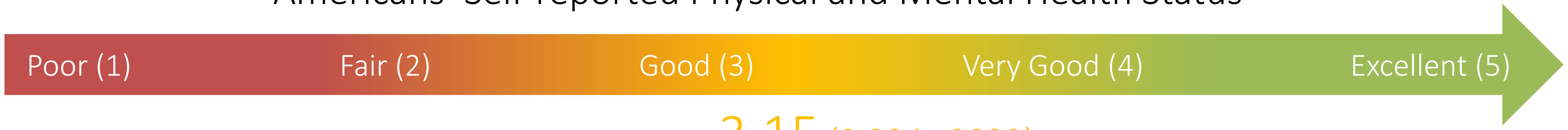
1. Simple
2. Engaging
3. Repetitive
4. Brand must be the star



Q57: Next, think about those health care ads that you tend to remember more, do they tend to speak more to the 'head' presenting facts and features about their product or service or do they tend to speak more to the 'heart' connecting on a more emotional level with people. Slide the bar left or right depending on the type of message these more memorable ads present to you. **(-5 to +5 range)**

HOW AMERICANS ARE FEELING

Americans' Self-reported Physical and Mental Health Status

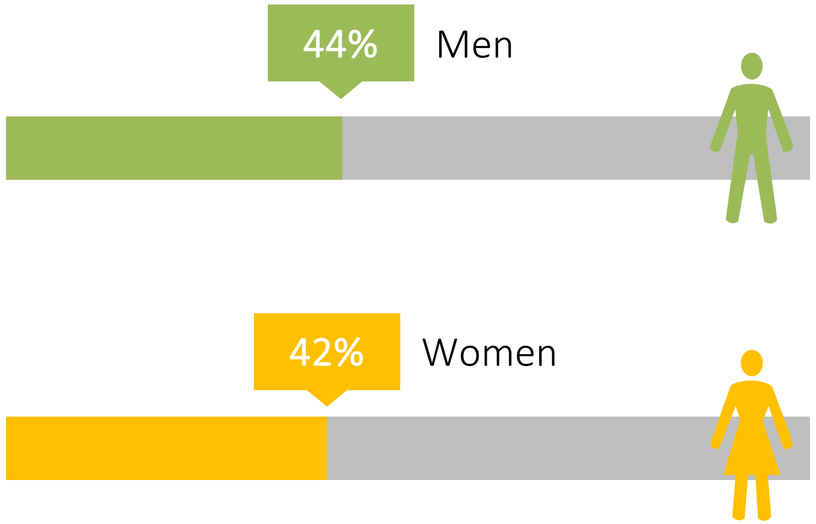


My physical health 3.15 (3.33 in 2022)

My mental health 3.34 (3.51 in 2022)

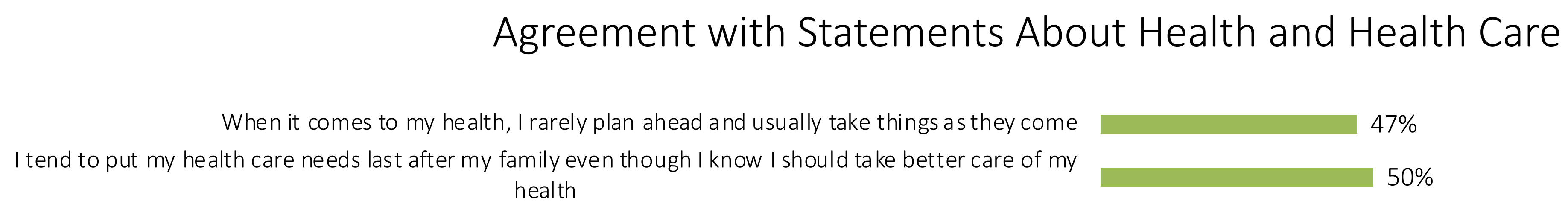
Mental health is significantly higher among men (3.61), Boomers (3.66) and Silent (3.89) age groups, as well as Caucasians (3.45) and Asian Americans (3.60).

Ongoing or Chronic Condition to Manage

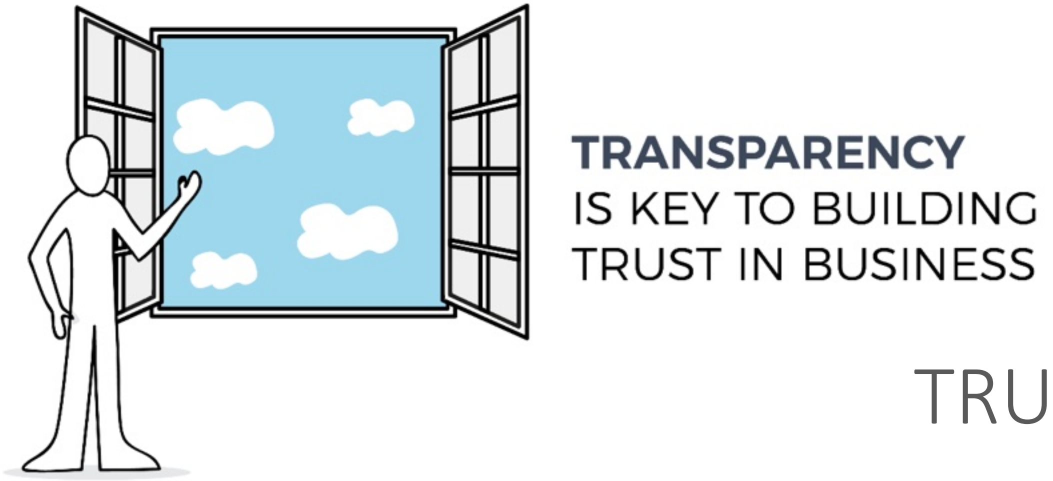


Q58: Do you have any ongoing or chronic medical condition that requires ongoing management (e.g., diabetes, Asthma, MS, etc.)?
Q59: In general, would you say your current physical and mental health is...?

ATTITUDES ABOUT HEALTH AND HEALTH CARE

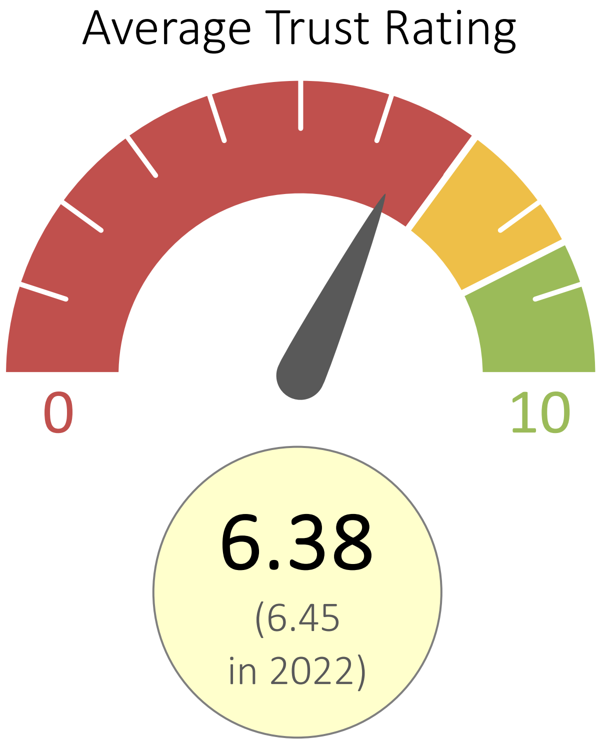


Q1: Next, for each of the below statements please check if you agree or disagree.
Note: % Strongly Agree/Agree shown.

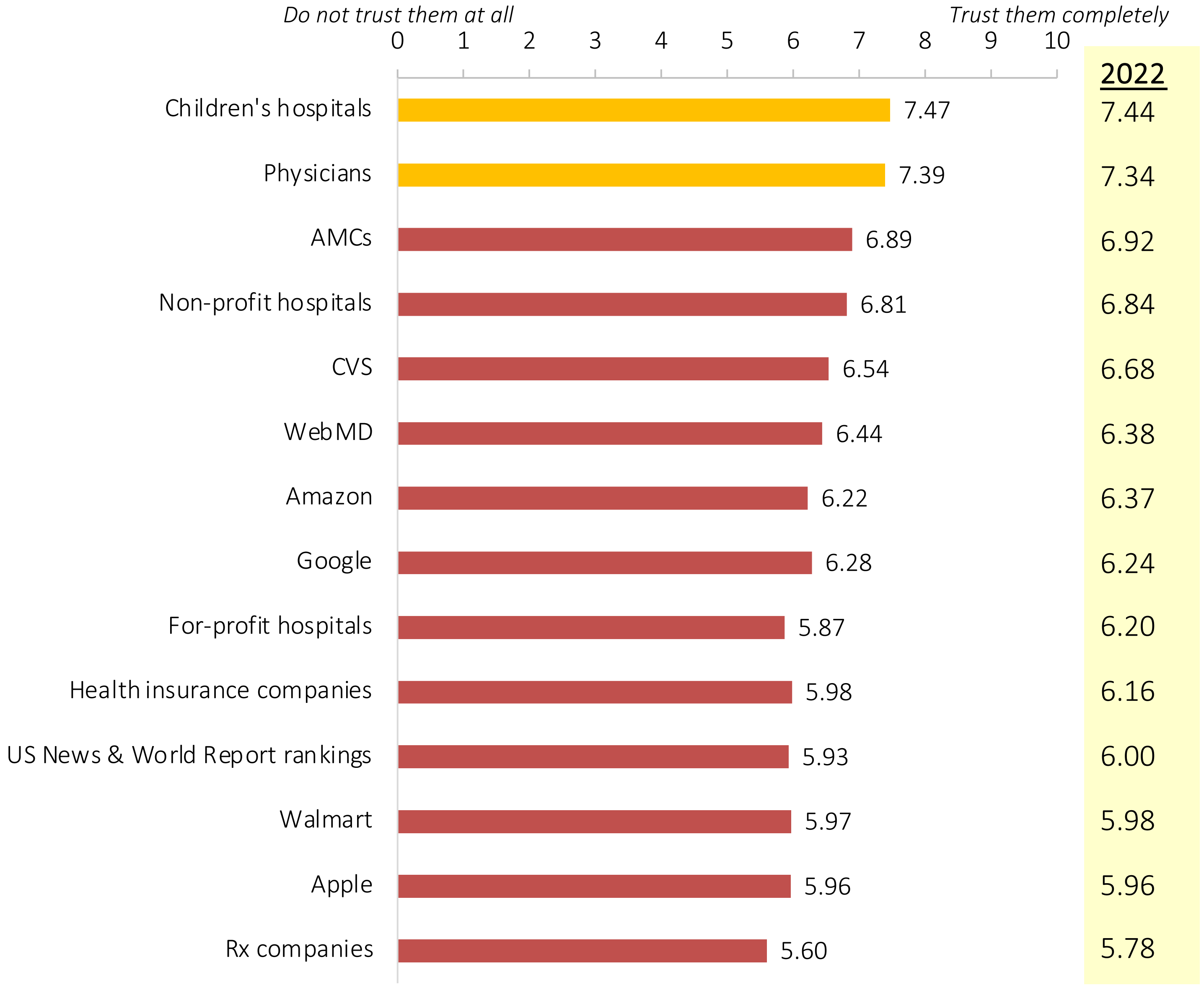


TRUSTWORTHINESS IN HEALTH CARE

Trust is NOT improving for any health care organization



Trustworthiness



Q39: Next is a list of people or organizations that are involved in health care in different ways. Please tell us how much you trust each using a scale of 0 to 10... **[Mean scores shown]**

DISRUPTORS IN HEALTH CARE

a) **Amazon Care:** Provides primary and urgent care services to adults virtually on your mobile device or PC as well as in-person at one of their locations or in your own home or even your workplace.

b) **Health insurance plans** such as Humana and Kaiser opening up primary and urgent care centers; Humana will open its own senior-focused primary care offices while Kaiser has partnered with Target and CVS to open up clinics in Target stores.

c) **Walmart Health:** Clinics in Walmart stores providing medical, dental, and optometry services.

d) **Virtual-first primary care plans:** Major plans such as UnitedHealthcare, Aetna, and Cigna are developing health plans where the first entry point to getting primary and urgent medical care is with a virtual primary care provider. From there, the next step in the care journey is determined and can include transitioning to in-person care.

e) **Artificial intelligence-powered virtual assistant:** Alexa Health and Wellness at Amazon can interact with people in their home and provide reminders to take prescriptions and answer health-related questions, schedule appointments, etc.

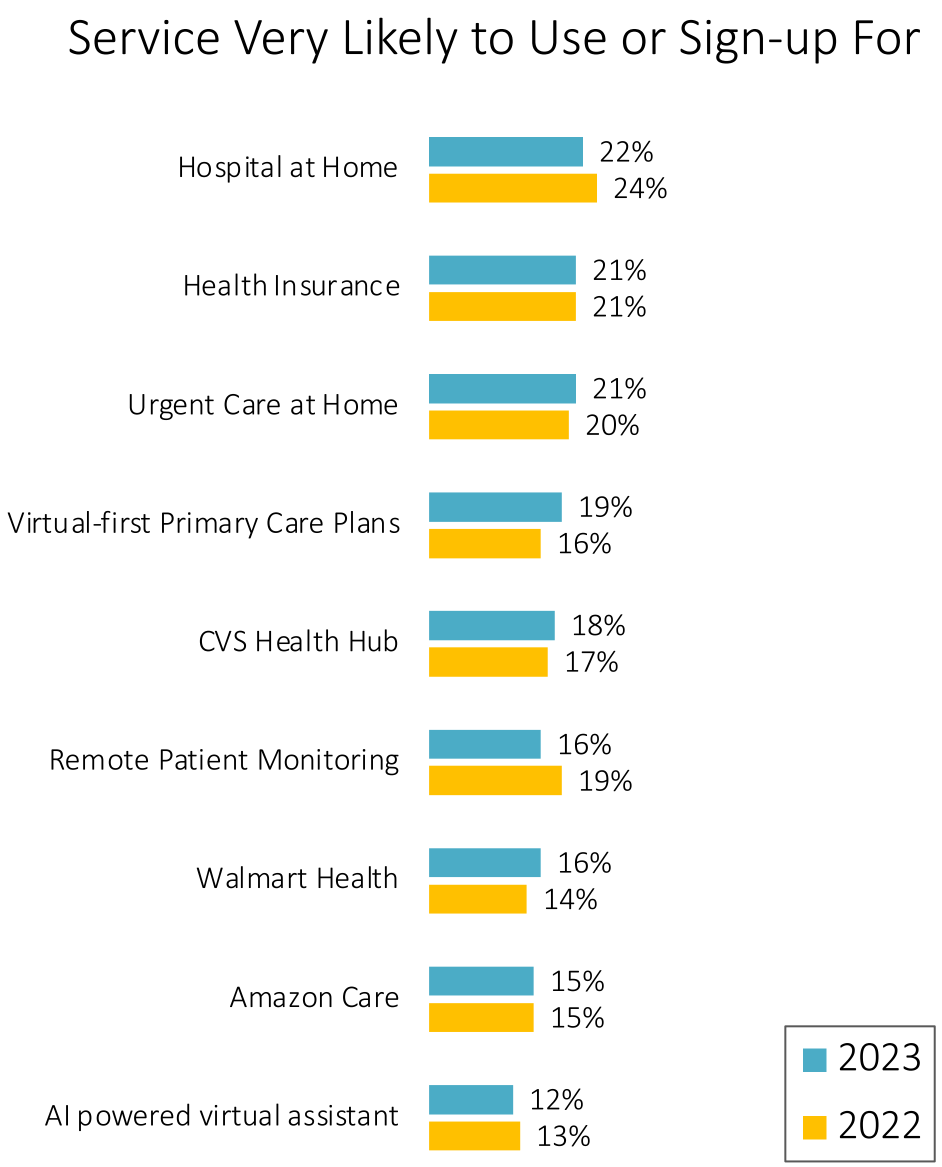
f) **Remote patient monitoring:** The use of digital technologies to monitor and capture medical and other health data from patients and electronically transmit this information to health care providers for assessment and, when necessary, recommendations and instructions.

g) **Hospital at Home:** Hospital-at-home enables some patients who need acute-level care to receive care in their homes, rather than in a hospital. For example, following a surgery, rather than an extended hospital stay, the patient is sent home with equipment such as IV's and remote, internet-based monitoring devices, along with visits from medical professionals, to recover and recuperate in their own home.

h) **Urgent Care at Home:** Rather than visiting an urgent care center for non-life-threatening situations, patients can request a traveling "urgent care" team of two medical professionals capable of administering tests and certain medications to visit their home in a timely manner.

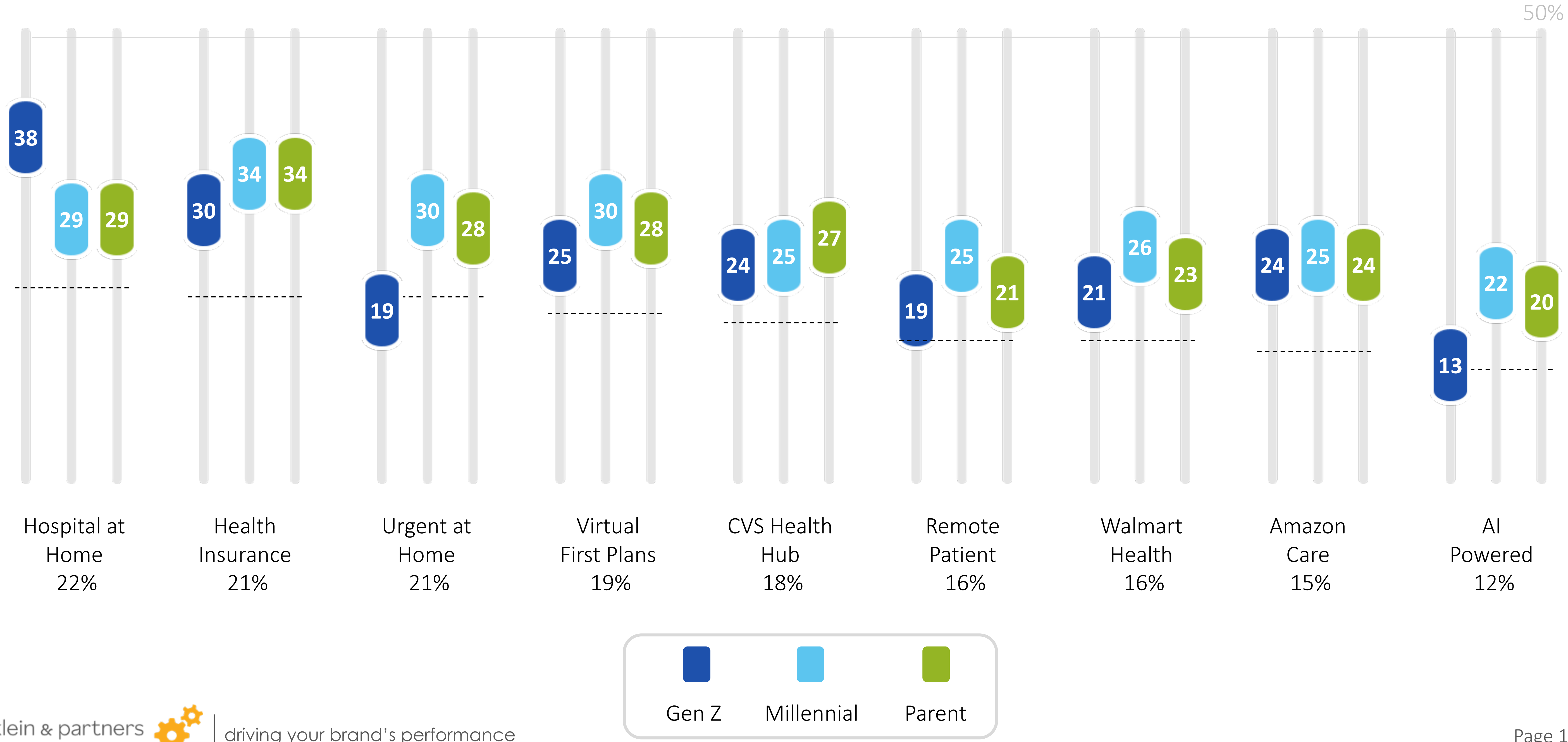
i) **CVS Health Hub:** Expanding on Minute Clinics that focus on minor illnesses and immunizations, Health Hubs focus more on chronic disease management, services like sleep apnea assessments, blood draws, virtual visits, on-demand health tools apps. And a "care concierge" will direct customers to providers like nurse practitioners or nutritionists. There also will be an expanded offering of medical equipment and other medical supplies.

Getting care 'at home' and health insurers offering care locations are creating the most interest

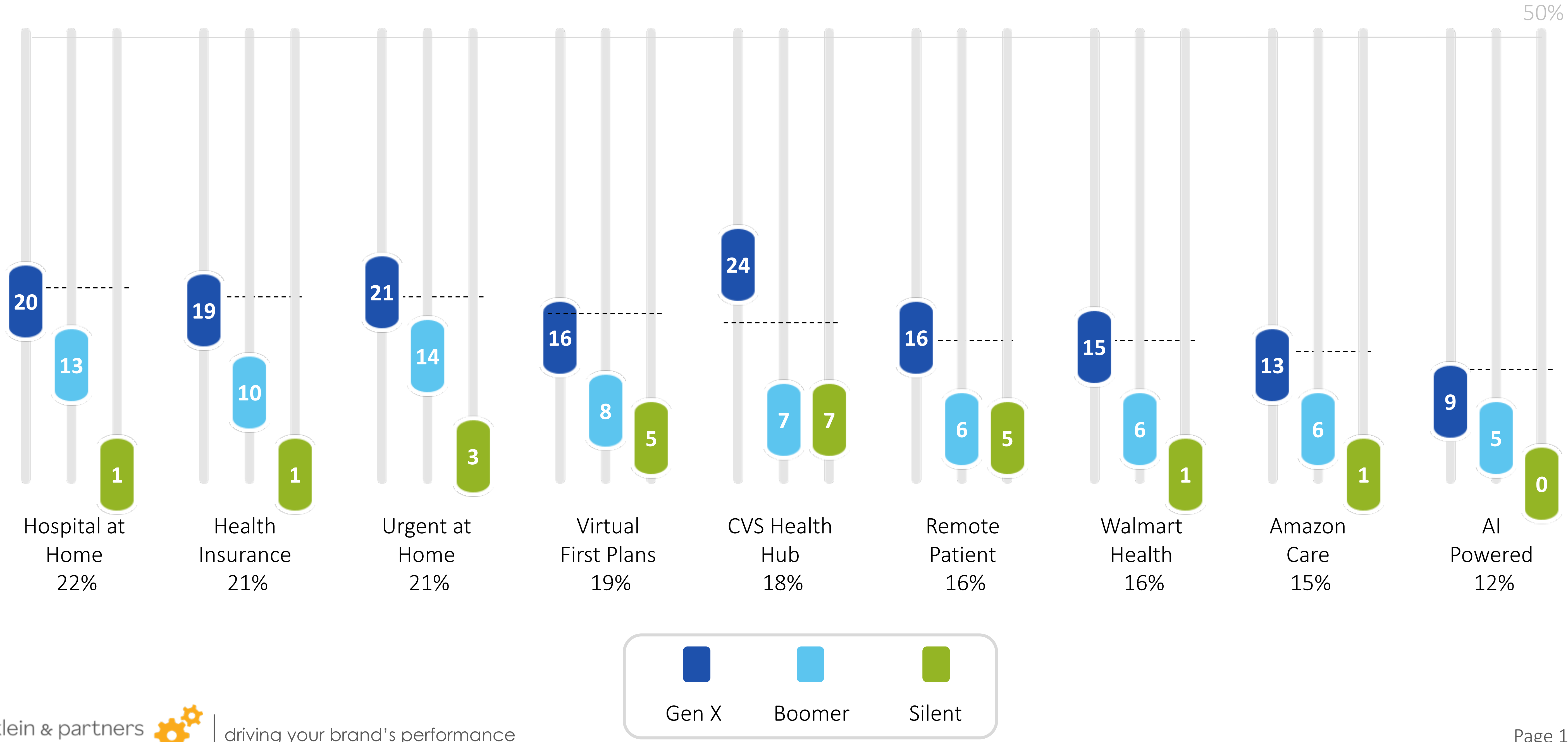


Q72: Next, how likely would you be to sign-up or use this new health care service?

It is interesting how Gen Z wants hospital care at home but not necessarily urgent care at home (trust issue with hospitals?), and Millennials are the only age group with any interest in AI powered health care



Gen X is the last generation with interest in any of these disruptors; the question becomes – how does health care convince older patients to adopt any of these disruptors?

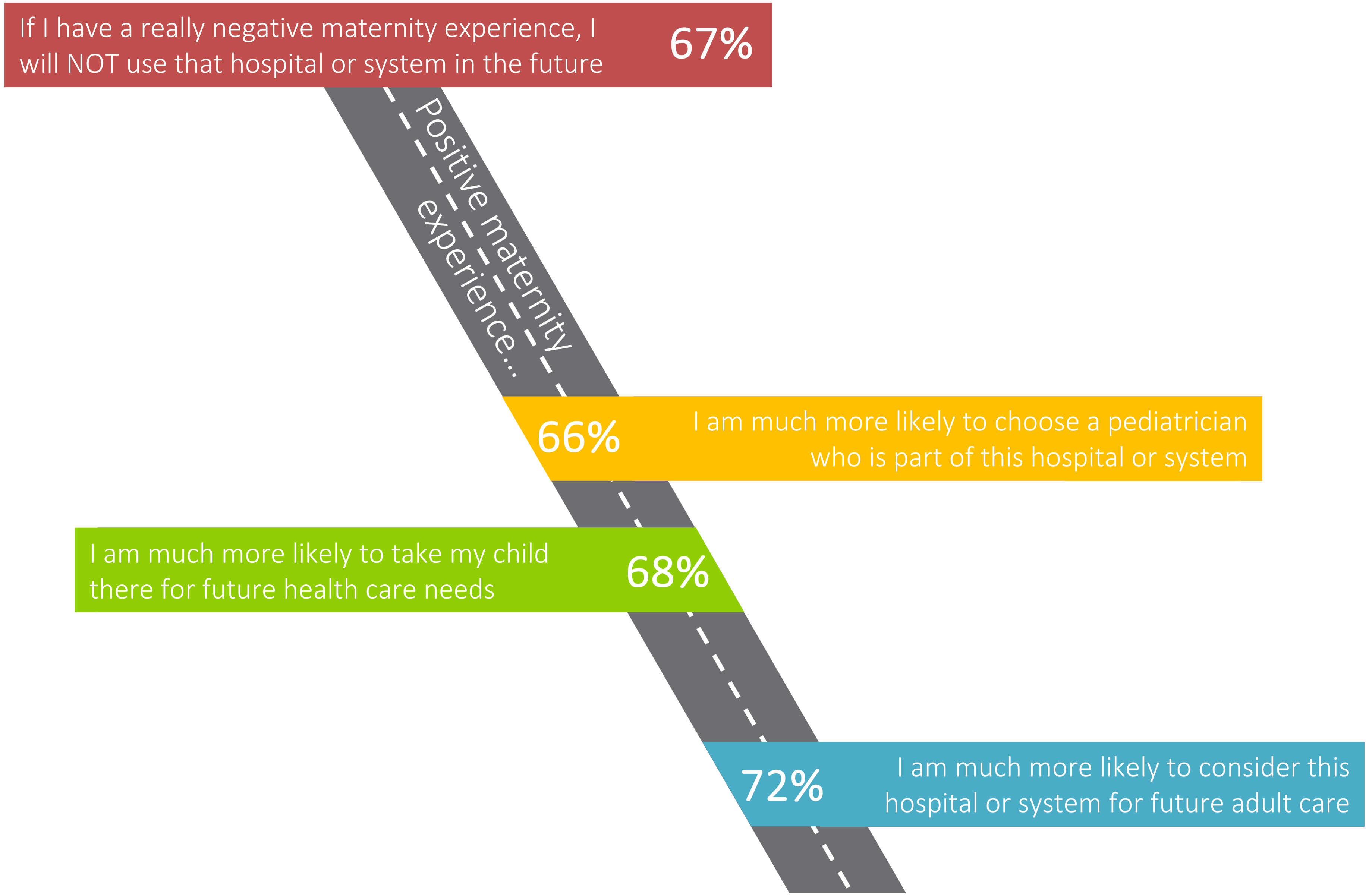


MATERNITY HALO EFFECT ON LIFETIME CUSTOMER VALUE

A positive maternity experience significantly increases future pediatric and adult health care brand choices while a negative maternity experience almost guarantees lost future pediatric and adult revenue → **excellent maternity experience = lifetime customer value**

48%

of women have had a (recent) maternity experience or are considering pregnancy



Q47: Please check any of the following statements that describe you currently…
Q49: Please agree or disagree with the following statements… **Note: % Strongly Agree/Agree shown.**

The top of the sales funnel

PRIMARY CARE ‘PROVIDERS’

Instead of trying to force younger adults into getting a PCP, how can your organization meet them where they are at with their health needs and expectations? For younger adults, it's more about access than the physician

88% of adults have a Primary Care 'Provider'

Having a PCP increases significantly as people age

Gen Z 70%

Millennial 89%

Gen X 85%

Boomer 93%

Silent 97%

Down significantly from 78% in 2022

Primary Care Provider is…

74% Primary Care Physician

6% OB/GYN

18% PA or NP

And They Are Located At…

73% Physician's Office

15% Hospital

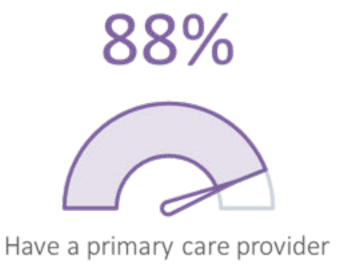
5% Urgent Care Center

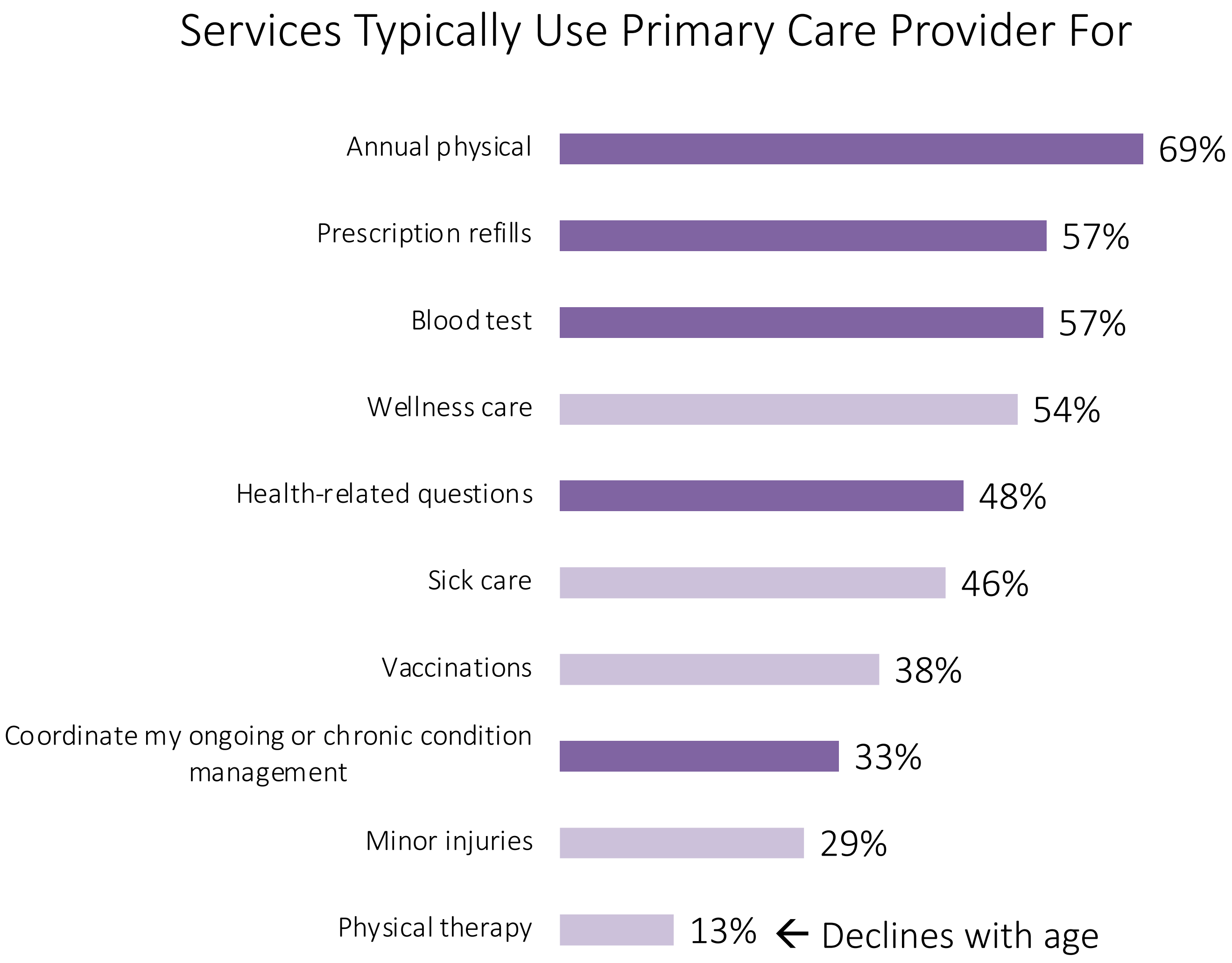
3% Retail Pharmacy

1% Virtual App

Q2: Do you have a primary care provider?
Q2.2: Who do you consider to be your primary care provider?
Q2:1: Is your primary care provider located at a…?

Patients are more likely to see their primary care provider for staying healthy than getting treated for sick care; is our primary care offering adapting to more of a wellness model than just traditional sick care?





Darker bars are services that increase significantly with age

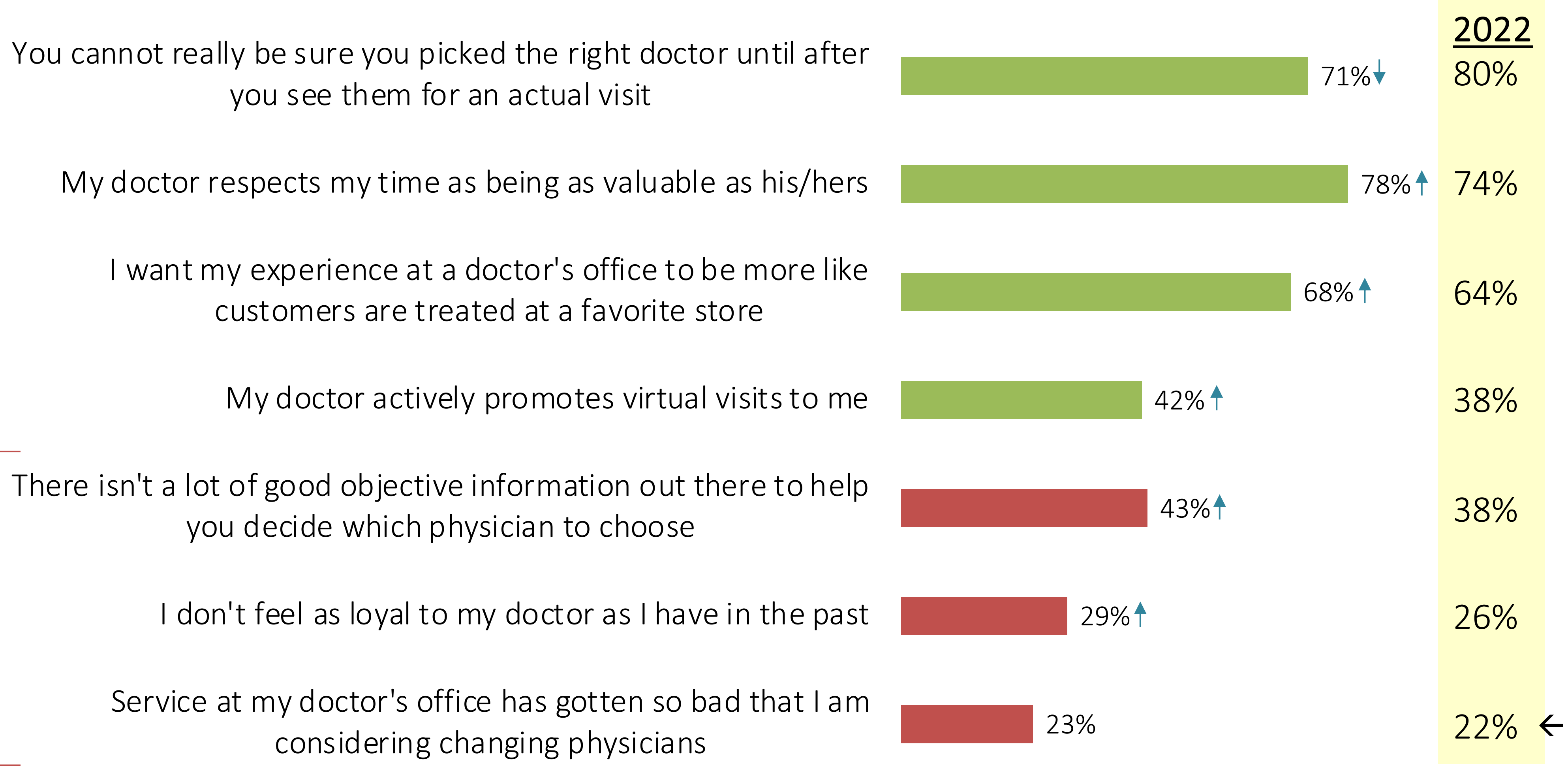
Q12: What services do you typically use your primary care provider for?

But all is not roses for patients with their primary care provider; more switching may be on the horizon

88%

Have a primary care provider

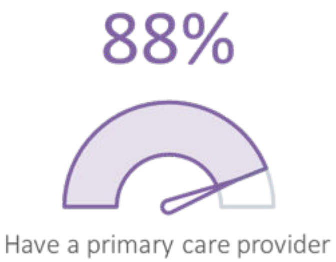
Consumer Agreement with Statements About Their Relationship with Their PCP

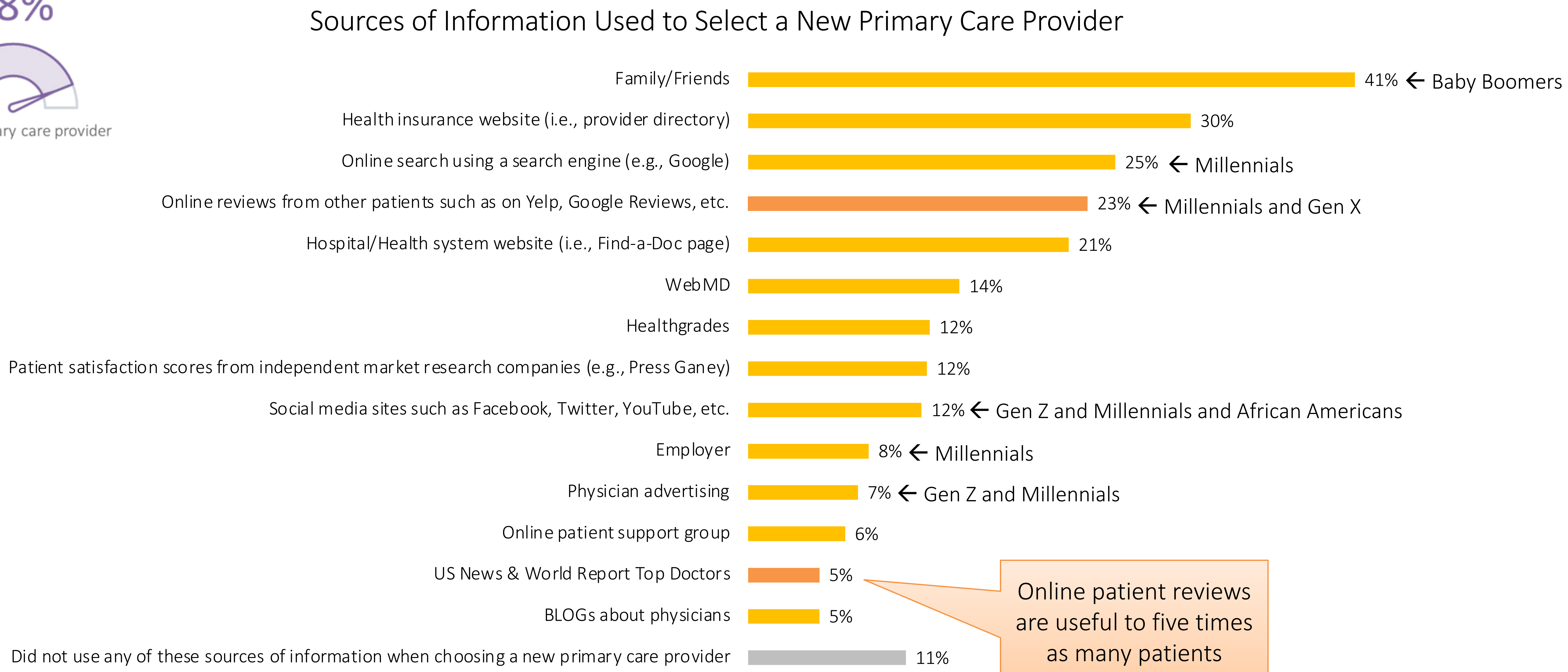


← This was 10% just 6 years ago

Q5: Next, for each of the following statements please check if you… (Agree/Disagree scale)
Note: % Strongly Agree/Agree scores shown.

Word-of-mouth is still a major source of information consumers use to choose a provider – patient satisfaction is a growth strategy not just a retention strategy





Online patient reviews are useful to five times as many patients choosing a PCP than US News Top Docs.

Q9: Which of the following sources of information have you actually used to help you choose a new primary care provider?

ONLINE RATINGS/REVIEWS

Physician stars ratings are important to a significantly greater proportion of consumers and the bar is set much higher this year

Online Physician Ratings		2023	2022
Minimum stars rating to be comfortable choosing that physician		4.04+↑	3.06+
Star ratings do <u>not</u> play a role in my physician decision-making/Not sure		31%↓	45%

Q6: If you were looking at online 'star' ratings of different physicians, on a 1-5 star rating scale, what is the minimum star rating that you would want any doctor to have for you to feel comfortable choosing them?

Consumers, especially younger ones, respect more what their peers have to say than any professional organization

Preferred Hospital Quality Source

Consumer-driven review sites: 39%
Quality ranking organizations: 25%
Neither: 25%
Not sure: 11%

Want to reach Gen Z to Gen X along with Hispanics and parents?

Consumer-driven review sites are key!

Which is more Important?

	2022 / 2023
Reviews:	30% / 38%↑
Ratings:	17% / 13%
Both:	33% / 36%
Not sure:	20% / 13%

Gen Z are more likely to prefer reviews while Millennials are more likely to prefer ratings; older folks need both.

Average number of ratings and reviews need to find them useful

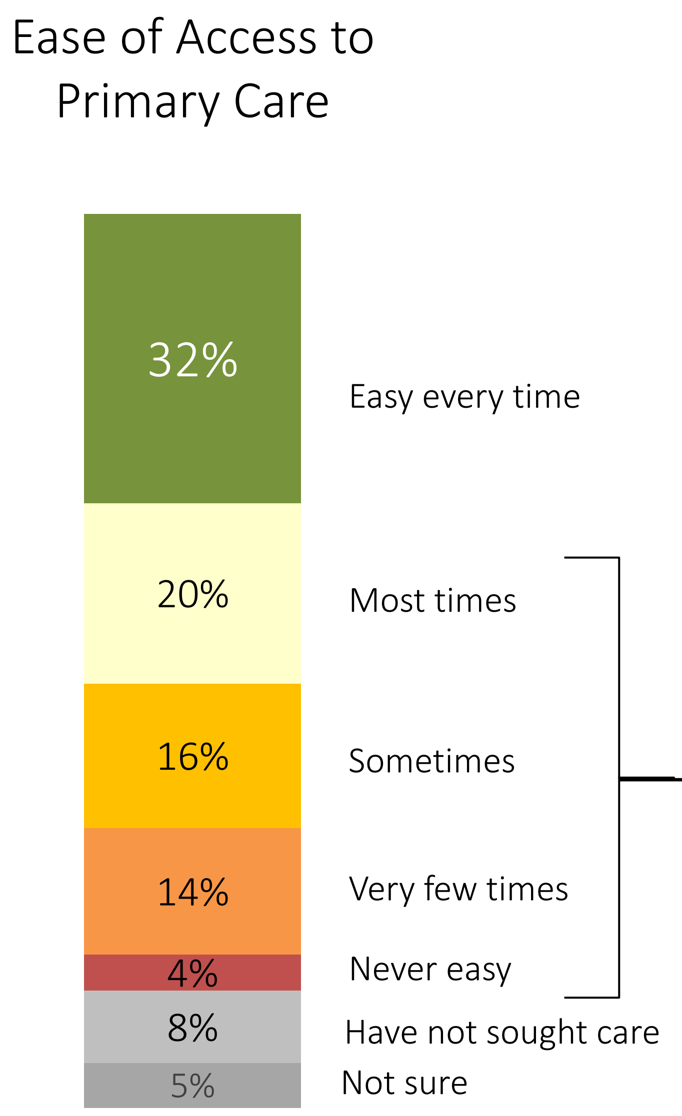
	2022 / 2023
Ratings:	**552 / 464**
Reviews:	**554 / 517**

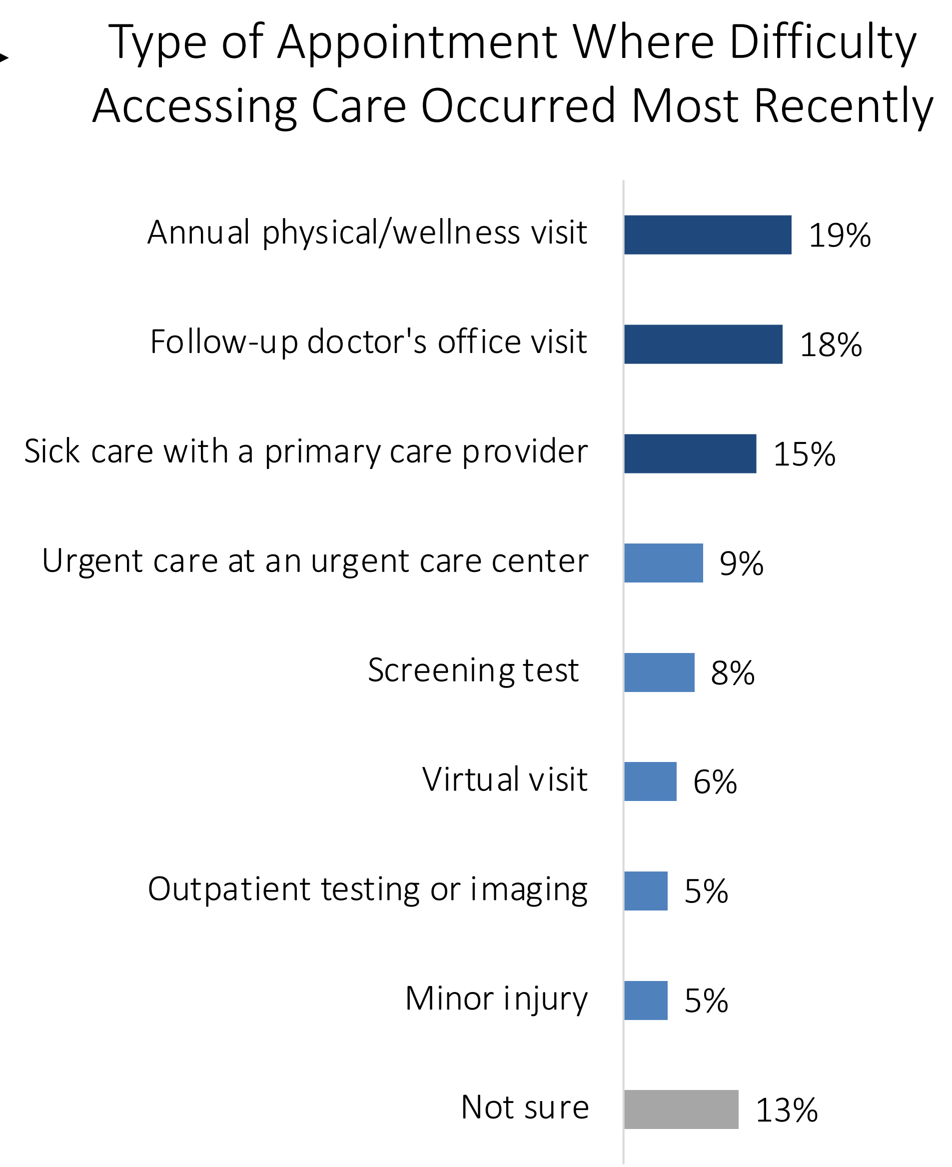
Quantity of reviews and ratings matter more to younger adults, while older adults are less likely to even look at them.

Q14: Now, if you were looking for information to compare different hospitals before you decided 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?
Q15: If you were looking at consumer-based ratings and/or reviews to help you decide on which hospital to choose, which would be more useful to you...?
Q16: Now, about how many hospital ratings are needed for you to find them useful in your decision-making?
Q17: And about how many hospital reviews are needed for you to find them useful in your decision-making?

PRIMARY CARE ACCESS

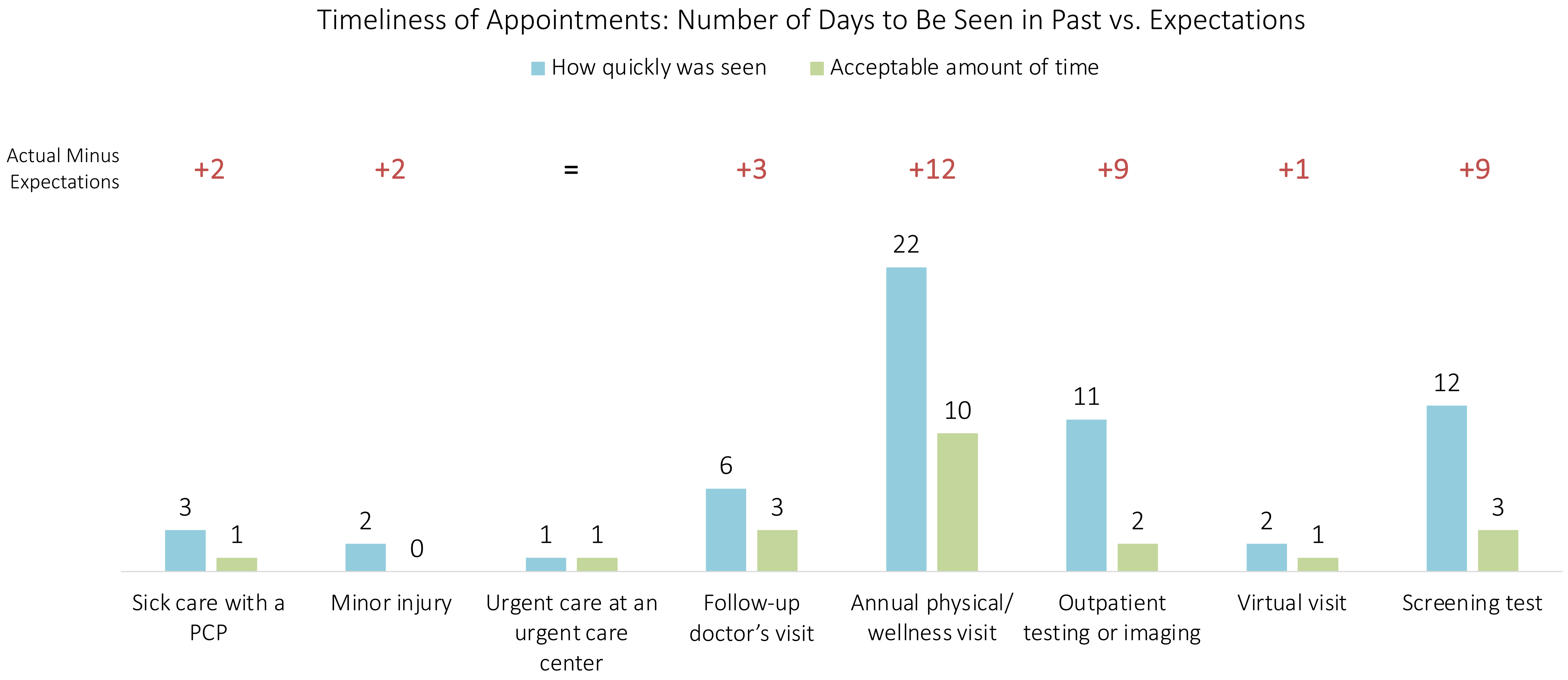
Most patients have had difficulty accessing primary care in the past year; it was mostly for annual physicals, follow-up visits and sick care





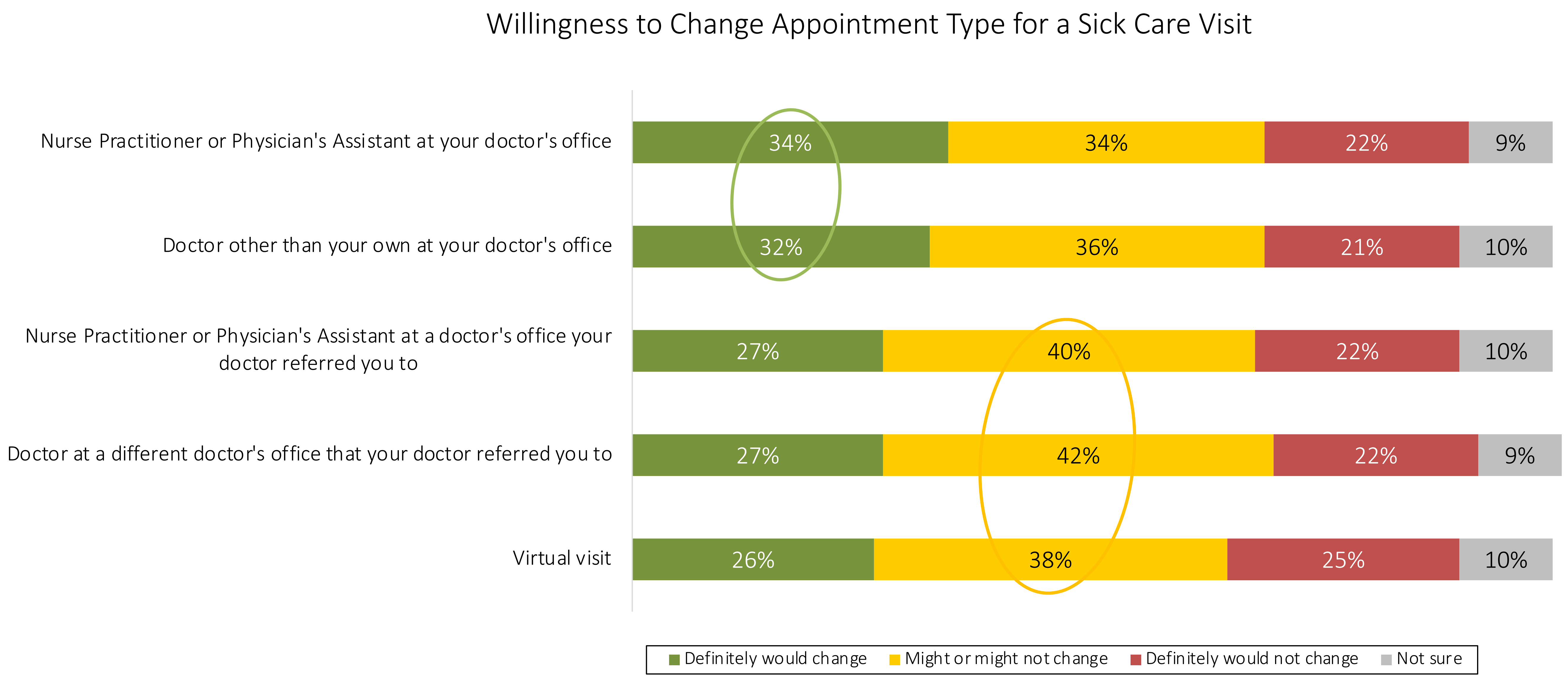
Q18 : Next, think of all the times in the past year you have needed primary care (e.g., physical, vaccination, sick care, testing or imaging, etc). When it comes to accessing primary care, would you say it is easy to access primary care…?
Q19: What type of appointment did you have that you had difficulties accessing care for most recently?

Annual physical and outpatient testing/screening timing fell short of expectations more than any other visit type

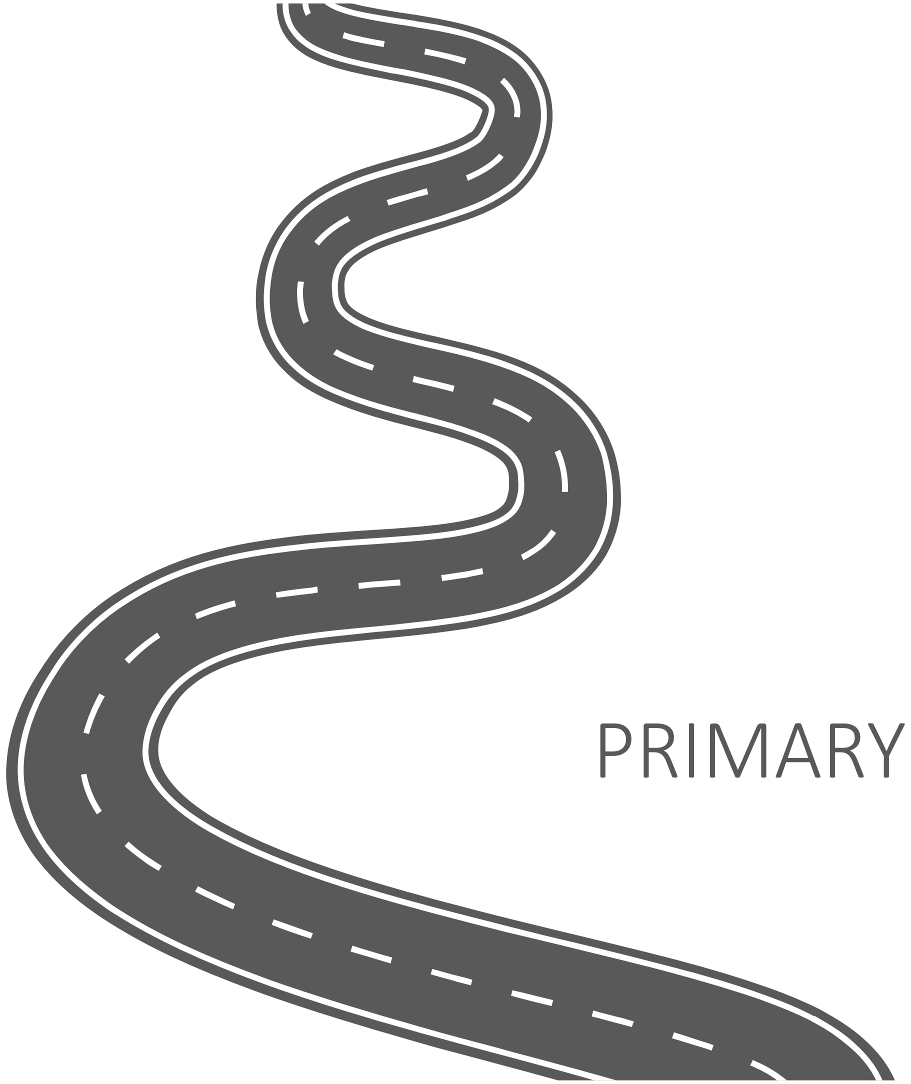


Q20 : How quickly were you able to be seen for this appointment for {RESTORE Q19 RESPONSE}?
Q21: What would an acceptable time have been to be seen for this appointment for {RESTORE Q19 RESPONSE}?

Patients are most open to seeing an Advanced Practitioner or another physician in their same office location (i.e., I'll switch provider types, but I want to come to my same office), but many could be persuaded to go to another office location if the hand-off is easy and clear

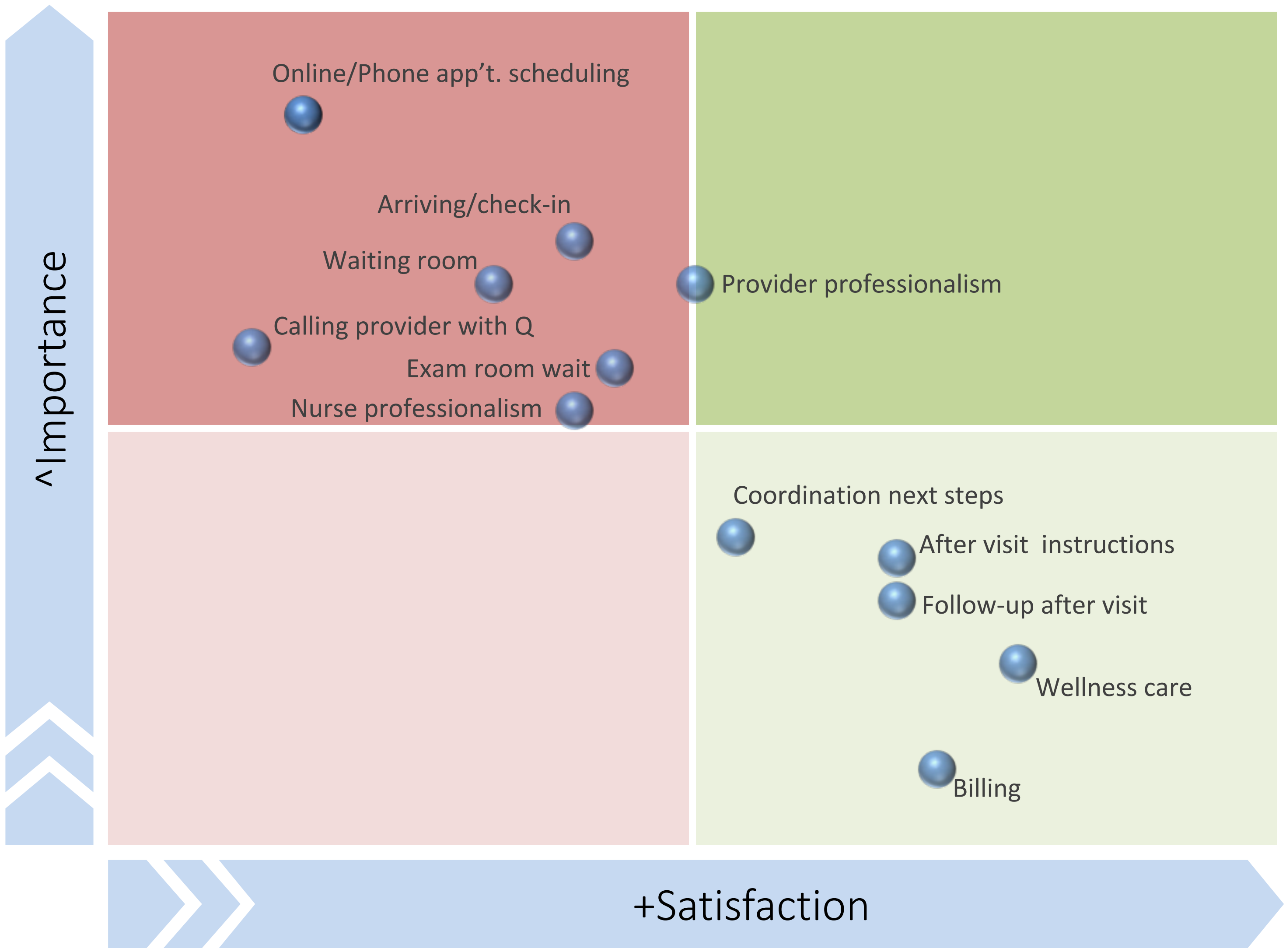


Q27: Now, suppose you were trying to schedule a doctor's office visit for sick care and the doctor could not see you for at least a week or longer. If the office offered that you could be seen that same day, would you change to any of the following…?



PRIMARY CARE JOURNEY MAPPING

Priority improvement matrix for the primary care experience journey



^Importance is defined by Q46 which asks for the top-3 touch-points that most impacted their overall satisfaction rating for their most recent primary care visit.
+Satisfaction is derived by the response code 'nothing in this area needs improvement' score for each touch-point.

Priority areas of improvement within each primary care experience touch-point

Calling Provider with a Question

Phone answered by live person, no voicemail	21%
Physician returns call when agreed upon	21%
Attitude of staff member	20%

Scheduling by Phone

Phone answered by live person, no IVR	30%
Phone answered by live person, no voicemail	26%
Able to see doctor when desired	24%

Scheduling Online

Able to see provider when desired	20%
Scheduling program offers alternatives	19%
Info gathered online estimates time needed / Early AM appts.	18% each

Arriving/ Checking in

Knowledgeable staff members who coordinate care with providers	24%
Office texts me if running late	17%
Greet me like happy to see me and know me	17%

Waiting Room

If I have to wait, they let me know how much longer it will be	23%
They tell me upon arriving how long wait will be / If I arrive early, they see me early / Comfortable chairs	19% each

Exam Room Wait

If I have to wait, they let me know how much longer it will be	34%
Comfortable place to sit and wait to be seen	30%
Staff member tells me how long it will be to see provider	29%

Nurse's/Medical Assistant's Professionalism

Truly listens to me and my needs	24%
Answers all my questions or gets answer for me	20%
Spends appropriate amount of time with me	19%

Provider's Professionalism

Truly listens to me and my needs	20%
Spends appropriate amount of time with me	18%
Reads my chart before entering so they know why I am there	16%

After Visit Care Instructions

Instructions are clear/easy to understand and follow	26%
Provider emails prescription to any pharmacy I want	26%
I am given a printed summary before leaving	25%

Coordination of Next Steps

Can get lab work done before leaving	17%
Calls with results as soon as they get them	16%
Results sent back to my provider promptly	15%

Follow-Up After Visit

Contacts me when they said they would	37%
Asks me how I want to be contacted	33%
Follow up with provider via online EMR	29%

Wellness Care Between Visits

Reminds me when I am due for tests	22%
Provider is responsible for managing health overall	20%
Provider periodically checks in on me	19%

Billing

Bill is easy to understand	30%
Accuracy of bill	27%
Working to keep costs down	21%

Primary Strength: Higher Importance, Higher Satisfaction

Secondary Strength: Lower Importance, Higher Satisfaction

Primary Opportunity: Higher Importance, Lower Satisfaction

Secondary Opportunity: Lower Importance, Lower Satisfaction

Maximum Acceptable Amount of Time to…

see a PCP	2 days	wait in the waiting room	11 minutes
receive lab results	2 days	wait in the exam room	7 minutes

Some patients expect no waiting…

45% expect to see the PCP the same day
27% expect no waiting in the waiting room
30% expect no waiting in the exam room
24% expect lab results the same day
(but 41% say what ever time the physicians says is acceptable)

Women tend to expect slightly shorter wait times

	Women	Men
Days to see PCP	2	3
Mins in waiting room	11	12
Mins in exam room	7	8
Days to receive lab results	2	2

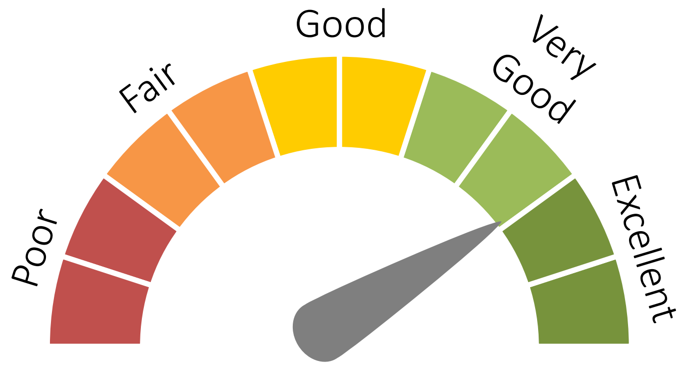
Those with PCP experience are more flexible (or just more knowledgeable of how things work)

	Used a PCP	Have Not Used a PCP
Days to see PCP	3	1
Mins in waiting room	12	7
Mins in exam room	8	5
Days to receive lab results	2	1

Q31: What is the maximum acceptable amount of time to get into a primary care provider's office visit for routine or sick care?
Q34: Once you arrive at the provider's office and get checked in, what is the maximum acceptable amount of time for you to wait in the waiting room to be taken back to the exam room?
Q37: What is the maximum acceptable amount of time for you to wait to see the provider once you are in the exam room?
Q41: What is maximum acceptable wait time for you to receive lab results?

There definitely is room for improvement in a primary care experience, especially as we look across different groups of adults

Overall Satisfaction with Recent Primary Care Experience



Satisfaction Ave = 3.99

Gen Z	3.65
Millennials	3.93
Gen X	3.98
Boomers	4.10
Silent	4.47

Have a PCP	4.06
Do not have a PCP	3.24

Income $60k+	4.11
Income <$60k	3.89

Men	4.08
Women	3.89

African Americans	3.74
Hispanics	3.87
Asian Americans	3.75
Caucasians	4.11

Q45: Thinking back on your latest visit to your primary care provider's office, how would you rate your experience overall?

PRICING + BILLING = THE TROUBLE TWINS

13% of adults across the country searched for prices on a health care service and chose the lowest price option

24% (20% in 2022)
Price Shopped

35% Gen Z/Millennials

31% $60k+ Income

Called: 54% (54% in 2022)

Went online: 26% (27% in 2022)

Stopped in personally: 10% (7% in 2022)

Emailed: 9% (11% in 2022)

56% (53% in 2022)
Chose Least Expensive Option

Service Price Shopped	Total
Dental services	17%
Lab services	14%
Screening or test	12%
Doctor’s visit	11%
Urgent care visit	10%
Outpatient surgery	9%
PT/Occ health	5%
GI procedure	3%
Ortho procedure	3%
Maternity	3%
Inpatient surgery	2%
Cosmetic surgery	2%

Q61: Next, within the past year, did you or did a member of your immediate household contact any health care organizations, hospitals, or physician offices to ask about the price for a specific visit, test, treatment, or surgery?
Q62: How did you check on pricing the most recent time?
Q63: What type of health service did you ask about pricing for the most recent time?
Q64: Did you end up choosing the least expensive provider the most recent time?

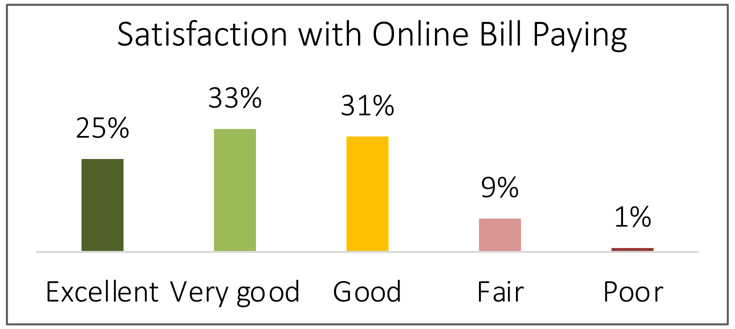
Preferred Method to Pay a Health Care Bill

48%	20%	19%	1%
Online	Mail it in	Phone	In person

52%↑
have paid a health care bill online
(41% in 2022)

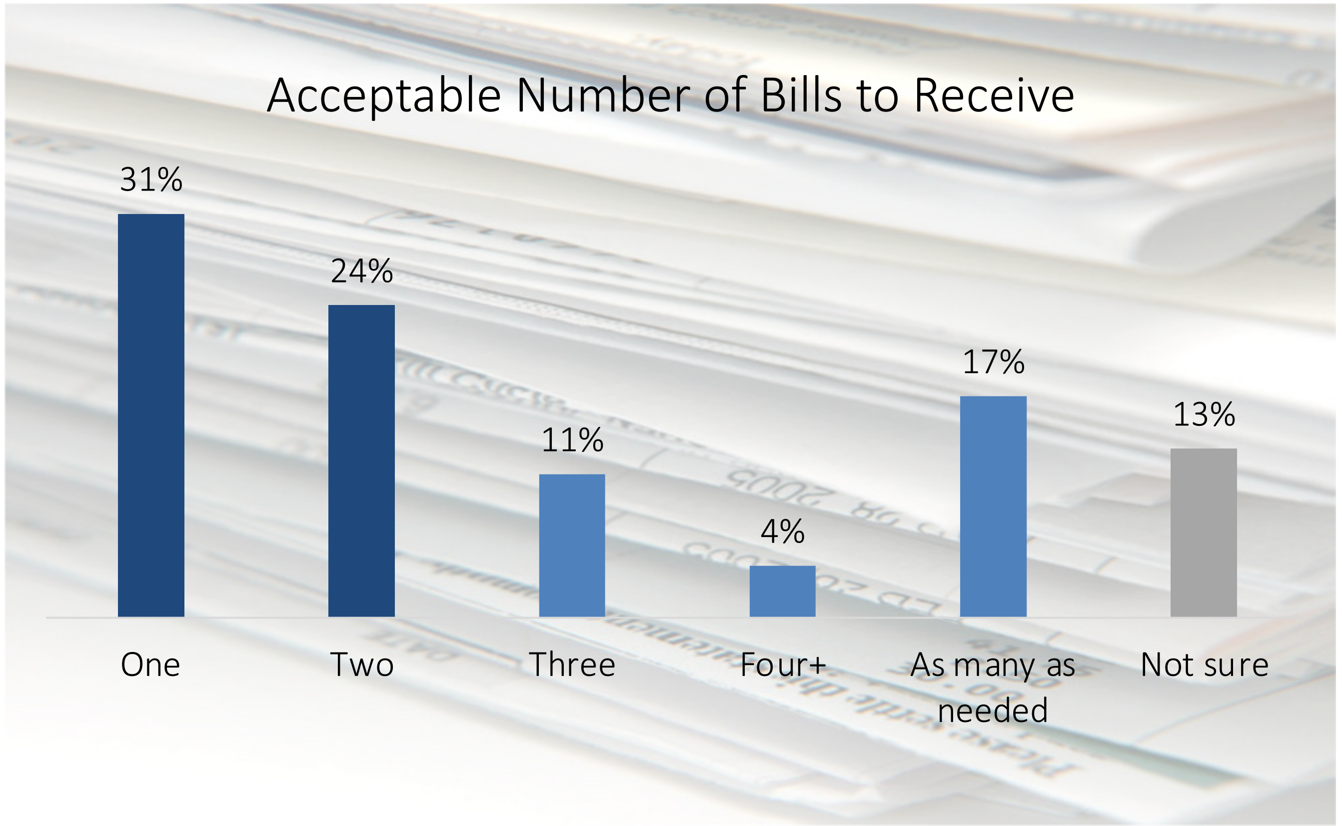
There is a very strong correlation between satisfaction with the online bill paying experience and the patient's satisfaction with their most recent primary care experience:

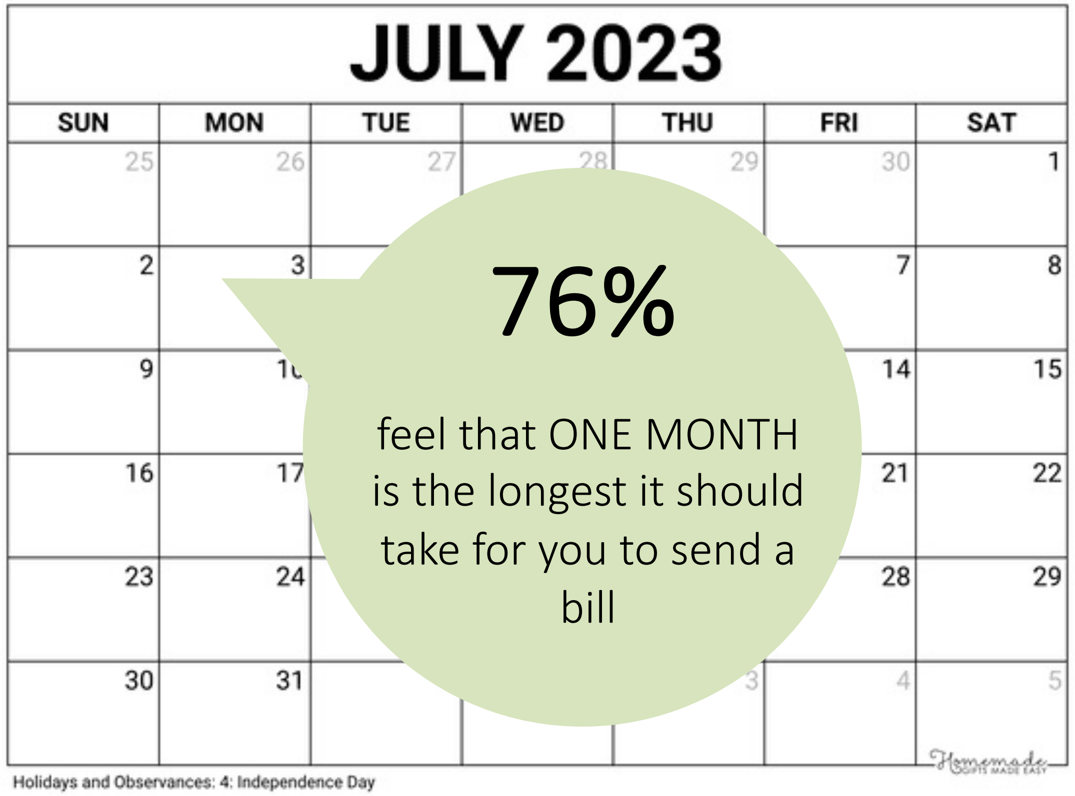
PCP Experience was…	Ex	VG	G/F/P
Online bill pay was Excellent	45%	15%	5%



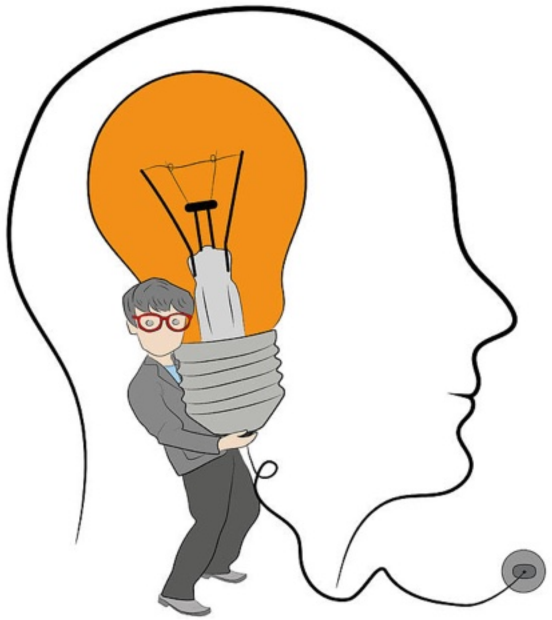
Q65: Do you prefer to pay medical bills...?
Q66: Do you ever pay your health care bills online through your provider's website?
Q67: How would you rate your online health care bill paying experiences overall?

One, maybe two, bills that I receive within a month is what is acceptable to most Americans – How do we meet this expectation?





Q68: Regardless of how many bills you actually have received for a particular experience, how many different bills for the same health care experience is acceptable to you?
Q69: And what is the maximum acceptable amount of time after your health care experience to wait for a bill (assuming you had a balance due)?



SOME THOUGHTS TO PONDER

- Nationally, COVID-brain continues to impact three in ten adults. It is impacting memory, attention-span, patience, and brand linkage. Advertising must be simple, catchy, repetitive, and the brand must be the star. And marketing to the post-COVID consumer means speaking to the heart. Being (not just acting) authentic is pivotal.
- Almost half of Americans do not feel medical information is written in terms they can understand. Klein & Partners' gSight website experience survey confirms this. Review your content and make sure it is using consumer friendly terms. Not doing so, turns people off to your brand. How many times have you heard a patient say, *"Stop using those big words and health care terms and speak to me using words I can understand."*
- Three in ten Gen Z do not have a primary care provider. Instead of trying to force younger adults into getting a PCP, how can your organization meet them where they are at with their health needs and expectations? For younger adults, it's more about access than the physician. What's more, loyalty to one's PCP is down. We may see switching increase in the coming years due to a lack of satisfaction with the office experience. A great physician bedside manner can no longer stave off the effects of dissatisfaction with staff and the overall office environment and experience.
- Americans are open to learning (advertising and online searching) what differentiates one provider from another so make sure you focus on how and why your organization is different. The ARF defines a strong brand promise as one that is 'meaningfully differentiating'. Five times as many Americans use online patient reviews to help them select a new PCP compared to US News Top Docs. And online patient reviews also beat US News hospital rankings by a wide margin when it comes to which source of hospital information is more useful in decision-making. Invest in managing your online patient reviews/ratings and not in US News rankings (i.e., don't waste budget on the badge).
- We've known this for decades → employee satisfaction = patient satisfaction. But right now, nearly half of Americans think systems care more about making money than taking care of patients. Is this true or do we just do a poor job communicating the truth?
- A quarter of Americans price shop for health care services. And if they do, nearly six in ten choose the lowest cost option. Lack of transparency and consistency across care site is not gaining you any trust points, especially when you have one price for an MRI at your hospitals and a lower price at your outpatient centers. And while most Americans want to pay their bill online, the experience leaves them less than satisfied and undoes all the trust and good feelings a strong patient experience just created. What do they want? → A single bill delivered within one month of service.
- Americans do not proactively prioritize their health care needs, especially women and parents. How can health care do a better job caring for caregivers?

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