EMPOWERING THE CONSUMER HEALTHCARE JOURNEY
THE AGE OF EMPOWERMENT

HOW DIGITAL IS USHERING IN A NEW AGE OF CONSUMER-CENTRICITY

We hold it in the palm of our hands, wielding the power to make things happen by just typing or speaking a word. The smartphone, complemented by wearables and connected devices, has become the heart of a new kind of personal health ecosystem. And everything is available - whenever, wherever and on-demand. In the healthcare segment, these digital game changers are having a dramatic effect on how we must appeal to a more demanding healthcare consumer.

Healthcare is rapidly evolving to consumer-centricity, with new generations of patients, and expectations, making their way into the mainstream of healthcare. Like many other industries, medicine finds itself at the intersection of control and empowerment. This presents an opportunity for progressive healthcare organizations...and a challenge for those grappling to make the pivot to patient-driven experiences.

In order to better understand healthcare consumers and their digital journey, Upward Brand Interactions - a strategic healthcare marketing and consumer experience agency - conducted a series of qualitative and quantitative studies. This offers unique insights into the desired channels, pain points and enablers of a more seamless and frictionless experience.
ABOUT THE REPORT

1. **400-PERSON WEB-BASED QUANTITATIVE STUDY**
   exploring the desire for digital among those who have accessed care in the past 18 months *(April, 2017)*

2. **200-PERSON WEB-BASED CONSUMER STUDY**
   exploring experience sentiment among consumers *(May, 2017)*

3. **300-PERSON DIGITAL USAGE STUDY**
   *(March, 2017)*

4. **TWO HEALTHCARE QUALITATIVE STUDIES**
   about desired care experience among millennial moms *(March, 2017)*

THE UPWARD CONSUMER HEALTHCARE EXPERIENCE REPORT is a compilation of studies conducted through a combination of in-person qualitative sessions and three quantitative studies that included input from more than 900 respondents. Survey questions encompassed a range of need states, from primary care through hospital care.
STUDY PARTICIPANT DEMOGRAPHICS

HEALTHCARE DIGITAL STUDY
• Average HHI $85K
• Average Age: 49
• Insurance: 60% - Employer
  20% - Medicare
  13% - Individual/Private
  5% - Medicaid
• Average HH size: 1.4
• 51% Female | 49% Male
• Minimum Physician Usage: 1x/18 Months; Median: 3.2x

DIGITAL INTERACTIONS STUDY
• Average HHI $86K
• Average Age: 43
• 52% Female/48% Male
• 50% B2C Users/50% B2B Users

CONSUMER SENTIMENT STUDY
• Everyday Consumers
• Average HHI $83K
• Average Age: 41
• 49% Female/51% Male

CONSUMER CONFIDENCE THAT PERSONAL INFORMATION IS SAFE ONLINE

- 65% of Millennials
- 53% of ALL Consumers
- 37% Seniors
SUMMARY FINDINGS + HIGHLIGHTS

- Consumers are increasingly engaged with digital devices and sources to guide them...with the smartphone or tablet at the center of their healthcare journey.
- Use of mobile devices, such as smartphones and tablets, are supplanting laptops and desktops as the choice of healthcare consumers, with tablets having grown into a mainstay device.
- Smart speakers, tablets and activity trackers are rapidly growing in usage.
- Increasingly, home health and wearable devices are becoming part of our everyday lives.
- Home blood pressure monitors, electronic health record (EHR) apps (e.g., MyChart), fitness trackers and heart rate monitors are now commonplace among consumers.
- Consumers increasingly want to access care, schedule appointments, get support and have access to their health information online.
- Personal contact for scheduling/feedback remains preferable in case patients have questions/clarifications; notifications/reminders are best handled by text, while email is the best form of follow-up for instruction/care plans/lab result documentation.

OVER 50% of consumers no longer have home phones...
Wanting More From the Web

The healthcare site/app features sought by more than 70% of consumers include:

- Contact information/directions/hours
- Lab and imaging results
- Personalized post-care instructions and follow-up
- Insurance acceptance and coverage
- Electronic health records
- Account info/bill pay
- Fill out pre-admission forms in advance of visit
- Treatment cost estimates
- After-hours/emergency physician contact information
- Symptoms and treatment options
- Account changes/management
- Appointment self-scheduling

Through the research, consumers expressed their desire to have ready access to a wide range of information, connections and resources.
**RATING OF TOP DESIRED FEATURES**

RATING 1-5
(1 = Lowest Desire, 5 = Highest Desire)

- Contact information/directions/hours
- Lab and imaging results
- Insurance acceptance and coverage
- Account info/bill pay
- Electronic health records
- Symptoms and treatment options
- Fill out pre-admission forms in advance of visit
- After-hours/emergency physician contact information
- Treatment cost estimates
- Account changes/management
- Second opinion/specialist referral
- Personal health recommendations
- Reviews and feedback on your physician
- Appointment self-scheduling
- Learn more about your doctor
- New Patient sign-up
- Care options
- Newsletter/notification sign-up
- Physician news/updates
- Local health alerts
- Mobile friendly (works well on a smartphone)

**INDICATIONS**

- Ensure robust access to information and always-on connections
- A responsive user design is essential for ease-of-use, from smartphone to tablet to PC
- Build an ecosystem that blends a branded portal with third-party applications that can change as new options emerge

17% of consumers have shared personal health tracking information from their smartphone with healthcare providers.
Consumers choose varying means of connecting with health answers and care. The path to care changes based on the urgency of requirement.

Information channels, engagement means and sources of validation vary along the path to care:

- Personal recommendations from family/friends and physicians remain the most powerful sources.
- Health information sites (like WebMD), Google and social connections dominate the early symptomatic phase of the journey.
- Google, health information sites and family/friend social/personal channels are utilized when validating treatment options.
- Provider websites and health insurer sites rise to the top as consumers seek to learn more about providers.
- Google, family/friends, provider websites, health insurer sites and reviews serve as a final check for validating a provider selection.

**INDICATIONS**

- Build a digital and channel map for various user types, ensuring a digital presence at each step of the journey.
- Remember, offsite focus is as essential as on-site focus.
Micromoment mapping can provide insights into the steps, thought processes and pain points across the healthcare journey. Upward has found that the journey is comprised by as many as 80-plus individual decisions and sources. Interestingly, a review of these small steps, or micromoments, revealed that the greatest frustrations were not with the early phases of care seeking, such as considering a hospital or other care point, but rather during the actual testing, diagnosis and treatment process.

**INDICATIONS**

- Undertake a micromoment mapping process for your organization
- Define how the journey may be different by patient type and location
- Understand the reasons behind the positives and negatives throughout the process
- Cluster micromoments into actionable “themes”
- Align digital strategy with patient pain points and need states
DEVICES AND SHARING

Consumers are increasingly using wearables, fitness trackers and health monitoring devices. What’s more, 17 percent of consumers indicate that they have shared personal health tracking information from their smartphone with healthcare providers.

HEALTHCARE USERS TOP DEVICE/APP OWNERSHIP (Own + Plan To Purchase)

<table>
<thead>
<tr>
<th>Device/App</th>
<th>Own</th>
<th>Plan To Purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>66%</td>
<td>6%</td>
</tr>
<tr>
<td>Blood Pressure Monitor</td>
<td>43%</td>
<td>4%</td>
</tr>
<tr>
<td>EHR App</td>
<td>34%</td>
<td>6%</td>
</tr>
<tr>
<td>eREADER</td>
<td>31%</td>
<td>4%</td>
</tr>
<tr>
<td>Fitness Tracker</td>
<td>30%</td>
<td>10%</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>19%</td>
<td>4%</td>
</tr>
<tr>
<td>Blood Glucose Monitor</td>
<td>18%</td>
<td>4%</td>
</tr>
<tr>
<td>Smart Watch</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Sleep Tracker</td>
<td>14%</td>
<td>4%</td>
</tr>
<tr>
<td>Smart Speaker</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>Smart Digital Scale</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Blood Oxygen Sensor</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>Virtual Physician Visit App</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>PERS</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

INDICATIONS

- Consider the integration of wearable devices and home health technology into your patient conversation
- Explore virtualized care for your patients at home
- This will grow, so integrate smartphone data from patients’ observations into your care conversation
ACTIVE DEVICE USAGE: 2012 VS. 2017
Broader consumer research indicated the following trends in device usage over the past 5 years.
The ability to reach and engage with care providers is an important part of the care experience. Here are consumer preferences for various communication goals:

<table>
<thead>
<tr>
<th>SCHEDULING APPOINTMENT</th>
<th>APPOINTMENT REMINDERS</th>
<th>RECEIVE LAB/TEST RESULTS</th>
<th>TREATMENT FOLLOW-UP INSTRUCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Phone Call</td>
<td>1 Phone Call</td>
<td>1 eMail (Tie)</td>
<td>1 Phone Call</td>
</tr>
<tr>
<td>2 In-Person</td>
<td>2 eMail</td>
<td>1 Phone Call (Tie)</td>
<td>2 In-Person</td>
</tr>
<tr>
<td>3 Website</td>
<td>3 Text</td>
<td>2 In-Person</td>
<td>3 In-Person</td>
</tr>
<tr>
<td>4 eMail</td>
<td></td>
<td>3 Website</td>
<td>4 Website</td>
</tr>
</tbody>
</table>

**INDICATIONS**

- Remember, over 50 percent of consumers no longer have home phones...they use mobile phones primarily; leverage their text and notification capabilities.
- Phone calls often have preference because consumers want to ask questions.
- Offer an always-available means of contacting your office.
Customer experience - whether positive or negative - will shape opinions, loyalty and advocacy for your healthcare brand. A word sentiment study of primary care providers showed that physician practices enjoy a much more positive net sentiment than hospitals. This is likely based on the more intimate relationship and personalized care over time.
Most negative consumer sentiment happens during the treatment process.

A majority of negative feedback comes from the way people are treated by others across the system; adopt a customer-centric service mindset… most of this is attitudinal.

Develop systems to inform and simplify the care and information process.

**INDICATIONS**

- Most negative consumer sentiment happens during the treatment process.
- A majority of negative feedback comes from the way people are treated by others across the system; adopt a customer-centric service mindset… most of this is attitudinal.
- Develop systems to inform and simplify the care and information process.
Upward Brand Interactions is a post-digital agency focused on patient acquisition and their healthcare journey. We help clients build best-practice strategies and roadmaps to deliver effective, consumer-centric experiences through an immersive process – informed by smarter insights - while leveraging the power of digital.

**Hospital Systems**
University Hospitals, Cleveland  
Kettering Health Network  
St. Joseph Health, California  
Dayton Children’s  
Ohio Valley Surgical Hospital  
Tri-Health, Cincinnati  
Grand Lake Health System  
Fisher-Titus Health System  
Blanchard Valley Hospital  
Mercy Health  
Margaret Mary Health  
Berger Health System

**Health Services**
Sodexo Global Home Care  
Comfort Keepers – Dayton  
CompuNet Clinical Labs  
First Light Home Care  
Special Tree Rehabilitation  
Lifebanc  
Health Pro

**Pharmaceuticals**
Takeda Pharmaceuticals  
Lilly Pharmaceuticals  
P&G Pharmaceuticals

**Medical Devices & Materials**
Zimmer Spine  
Clinton River Mobility  
Optimus Prosthetics  
Standard Register Healthcare  
PolyOne Healthcare  
Materion

**Primary Care**
PriMed Physicians  
MediSync  
Physician Practice Development

**Specialty Practices**
Ohio Gastro  
MaternOhio  
Society Of Chest Pain Centers  
Greater Ohio Eye Surgeons
THANK YOU

If you are seeking a partner focused on helping guide your healthcare organization elevate the consumer experience, optimize the journey or make the digital transformation, the Upward team stands ready to help.

CONNECT WITH US AT INFO@GOUPWARD.COM