Unmasking the eHealth Consumer

Presented at:
Insights 2014: Client Conference

Presented by:
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Mike Schneider, EVP and Principal, Greystone.Net

November 2, 2014
Agenda

- Key learnings from a recent online survey of Americans
- A look at a new way to improve consumers’ eHealth experience
WHAT ARE AMERICANS DOING ONLINE?
Background

- Klein & Partners annual nationwide quantitative survey focused on consumers’ current thinking on a wide range of healthcare-related topics.

Methodology

- **Methodology:** National online survey
- **Sample size:** 407 randomly selected heads of household who are the healthcare decision-maker and 18 or older
- **Field:** September 9 – 13, 2014
- **Sample error:** +/-4.1% at the 90% Confidence Level (CL)
SO WHAT DID WE LEARN?
‘Disruptive Expectations’
REACTIONS TO HEALTH REFORM
What’s getting better or worse for you under healthcare reform?

- Medical coverage: 12% Getting better, 39% Remaining unchanged, 43% Getting worse, 6% Not sure
- Network of available doctors: 10% Getting better, 54% Remaining unchanged, 27% Getting worse, 9% Not sure
- Network of available hospitals: 9% Getting better, 61% Remaining unchanged, 19% Getting worse, 11% Not sure
- Being seen by my doctor in a timely manner: 8% Getting better, 59% Remaining unchanged, 24% Getting worse, 9% Not sure
- Cost of insurance benefits: 7% Getting better, 30% Remaining unchanged, 57% Getting worse, 6% Not sure

And this is giving rise to the healthcare ‘customer.’
PRIMARY CARE PHYSICIAN
Going online to rate a physician or hospital has doubled in the past few years:

- 6% in 2009
- 9% in 2011
- 14% in 2012
- 12% in 2013
- 12% in 2014
Yes and I've used it, 2%
Yes but I have not used it, 5%
No I am not aware of this app, 93%
Most useful information sources for physician choice

*Word-of-mouth!*

- Family/friend recommendation
- Health insurer physician directory
- Recommendation from another physician
- Health insurer website
- Google search
- Online patient reviews (Angie’s List, Yelp, etc.)
- HealthGrades
- Phone book/Yellow Pages
- Hospital website
- Someone from hospital
- Interviewed doctor
- Local publication
- US News & World Report
- Newsletter (healthcare org)
- Social media site
- CMS quality ratings
- Direct mail
- Advertising
- Other
- None
- Not sure

*Significantly higher among Millennials*
ELECTRONIC MEDICAL RECORDS
Interest in having online access to your electronic medical record

- Very interested
  - Men: 34%
  - Women: 48%
  - 2014: 48%
  - 2012: 47%

- Somewhat interested
  - Men: 36%
  - Women: 35%
  - 2014: 35%
  - 2012: 35%

- Not interested
  - Men: 12%
  - Women: 14%
  - 2014: 13%
  - 2012: 11%

- Not sure what this is
  - Men: 4%
  - Women: 1%
  - 2014: 1%
  - 2012: 1%

- Already have access to EMR
  - Men: 5%
  - Women: 3%
  - 2014: 2%

- Use EMR – 12%
  - Haven’t used yet – 3%

Very interested in accessing via electronic medical record

- Receipt of test results
  - 2014: 85%
  - 2012: 84%

- View health information
  - 2014: 79%
  - 2012: 71%

- Renew prescriptions
  - 2014: 72%
  - 2012: 82%

- Review info after seeing doctor
  - 2014: 71%
  - 2012: 67%

- Look up info on medical condition
  - 2014: 65%
  - 2012: 56%

- Manage appointments online
  - 2014: 61%
  - 2012: 76%

- Message physician
  - 2014: 59%
  - 2012: 64%

- Review preventive health screenings
  - 2014: 57%
  - 2012: 50%

- Track and graph information
  - 2014: 43%
  - 2012: 37%

- Request an eVisit
  - 2014: 32%
  - 2012: 41%
SMART PHONES

‘Can you hear me now?’
Any of these uses is significantly higher among Millennials.
Hospital Apps most likely to use
(Among the 72% with a smart phone)

- Make, change or cancel an appt: 58% (2012), 68% (2014)
- Check lab results: 52% (2012), 58% (2014)
- Renew prescription: 51% (2012), 66% (2014)
- Clinic appt check-in: 44% (2012), 49% (2014)
- Email doctor: 39% (2012), 44% (2014)
- Check medical records: 39% (2012), 37% (2014)
- Emergency room wait times: 35% (2012), 38% (2014)
- Where do I park: 21% (2012), 34% (2014)
- Doctor lookup (find-a-physician): 31% (2012), 39% (2014)
- Pay medical bills: 28% (2012), 36% (2014)
- Wayfinding - directions within hospital: 25% (2012), 25% (2014)
- Wouldn’t use any of these: 12% (2012), 19% (2014)

From a market segmentation standpoint, potential use for most of these Apps is higher among Millennials.
INTEREST IN INFORMATION SOURCES
Sources of health-related information sought in past year

- WebMD: 46%
- Google: 36%
- Friend/Family: 20%
- Health plan website: 19%
- Called health plan directly: 17%
- Books, magazines, newspapers: 12%
- Hospital website: 11%
- Called hospital directly: 8%
- Consumer’s Report: 7%
- Health plan newsletter: 6%
- Social media: 6%
- Hospital newsletter: 5%
- Newsletter at doctor’s office: 5%
- TV or radio programs: 5%
- Online support group: 5%
- A health resources center or library: 5%
- YouTube: 5%
- HealthGrades website: 5%
- Yelp: 3%
- CMS Hospital Compare website: 2%
- Blog or microblog: 2%
- Other healthcare website: 1%
- JD Power: 1%
- Angie’s List: 1%

Green = Offline
Blue = Online
### Health related information sought on the Internet

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learned about a specific medical condition</td>
<td>37%</td>
</tr>
<tr>
<td>Researched symptoms experiencing</td>
<td>33%</td>
</tr>
<tr>
<td>General health information</td>
<td>32%</td>
</tr>
<tr>
<td>Researched medical procedures</td>
<td>21%</td>
</tr>
<tr>
<td>Disease wellness information</td>
<td>21%</td>
</tr>
<tr>
<td>Refilled a prescription</td>
<td>19%</td>
</tr>
<tr>
<td>Directions to hospital/facility</td>
<td>19%</td>
</tr>
<tr>
<td>Checked on a patient bill/paid bill</td>
<td>18%</td>
</tr>
<tr>
<td>Read physician reviews/ratings</td>
<td>17%</td>
</tr>
<tr>
<td>Researched/compared treatment options</td>
<td>17%</td>
</tr>
<tr>
<td>Info to find a new doctor</td>
<td>16%</td>
</tr>
<tr>
<td>Compared health plans</td>
<td>16%</td>
</tr>
<tr>
<td>Health and wellness program</td>
<td>15%</td>
</tr>
<tr>
<td>Checked lab or test results</td>
<td>15%</td>
</tr>
<tr>
<td>Scheduled an appointment</td>
<td>14%</td>
</tr>
<tr>
<td>Chose a health plan</td>
<td>11%</td>
</tr>
<tr>
<td>Disease management programs</td>
<td>11%</td>
</tr>
<tr>
<td>Instructions on how to prep for a test/exam/surgery</td>
<td>8%</td>
</tr>
<tr>
<td>Sought consumer reviews online</td>
<td>7%</td>
</tr>
<tr>
<td>Pre-registration for procedures or admissions</td>
<td>7%</td>
</tr>
<tr>
<td>Read hospital reviews online</td>
<td>7%</td>
</tr>
<tr>
<td>Subscribed to an e-health newsletter</td>
<td>6%</td>
</tr>
<tr>
<td>Price shopped costs of a test/procedure/visit</td>
<td>6%</td>
</tr>
<tr>
<td>Registration for health/wellness classes</td>
<td>5%</td>
</tr>
<tr>
<td>Asked a doctor/nurse for medical advice</td>
<td>5%</td>
</tr>
<tr>
<td>Visited state exchange website</td>
<td>5%</td>
</tr>
<tr>
<td>Had an email consultation with my doctor</td>
<td>3%</td>
</tr>
<tr>
<td>Web nursery/birth announcements</td>
<td>2%</td>
</tr>
<tr>
<td>Chose a hospital</td>
<td>2%</td>
</tr>
<tr>
<td>Compared services offered at different hospitals</td>
<td>2%</td>
</tr>
<tr>
<td>Checked ER wait times</td>
<td>2%</td>
</tr>
<tr>
<td>Have NOT searched any health-related info on the Internet</td>
<td>22%</td>
</tr>
</tbody>
</table>
Recent participation in online health-related activities

- Search symptoms when sick: 42%
- Visited health insurer’s website for health-related info: 20%
- Participated in employer’s wellness program: 16%
- Completed an online health assessment: 16%
- Accessed online personal health record to track own health information: 12%
- Downloaded healthcare-related articles: 11%
- Watched a video online on a healthcare topic or procedure/surgery: 11%
- Participated in health plan’s wellness program: 10%
- Visited a hospital’s website for health-related info: 9%
- Viewed online animation of a medical procedure/surgery: 6%
- Viewed hospital’s health and wellness class schedule: 5%
- Visited an independent healthcare rating organization’s website: 4%
- Listened to a Podcast on a healthcare topic: 3%
- Followed a hospital’s Facebook page: 3%
- Watched a live healthcare webcast: 2%
- Followed/Participated in a healthcare dialogue on someone’s BLOG: 2%
- Participated in an online patient support group: 2%
- Followed a health plan’s Facebook page: 1%
- Participated in an online chat with a healthcare provider: 1%
- Used cell phone to search healthcare-related info: 0%
- Followed a hospital’s BLOG or Twitter activity: 0%
- Followed/Participated in a healthcare dialogue on Twitter: 0%
- None of these: 33%
COMMUNICATION METHODS
Visiting/Liking health plan or hospital Facebook pages

- **Visited and "Liked"**
  - 4%
  - 4%

- **Visited but haven't "Liked"**
  - 3%
  - 3%

- **Have not visited**
  - 90%
  - 90%

- **Not sure**
  - 3%
  - 3%

Facebook visitors are almost entirely Millennials.
Yes I have used a virtual doctor service, 2%

Not sure, 5%

No I have not used a virtual doctor service, but am familiar with them, 22%

No I have not used a virtual doctor service, and am not familiar with them, 71%

Ever had a virtual doctor visit?
CHOOSING A HOSPITAL
Hospital choice factors by hospital experience

- **Physician**: 43%
- **Health insurance website**: 14%
- **Family/friend**: 14%
- **Online search**: 6%
- **Hospital's website**: 12%
- **HealthGrades**: 5%
- **Online patient support group**: 4%
- **WebMD**: 4%
- **Patient satisfaction ratings**: 2%
- **Hospital advertising**: 2%
- **Joint Commission**: 1%
- **Consumer Reports**: 1%
- **Social media sites**: 1%
- **Consumer review sites (like Angie's List)**: 1%
- **US News & World Report**: 1%
- **Employer**: 1%
- **Blogs about hospitals**: 1%
- **CMS website**: 1%
- **ANA Magnet Status**: 0%
- **Hospital publications**: 0%
- **Thomson Reuters Top 100**: 0%
- **None of these**: 38%

- **Been to hospital**: 41%
- **Have not been to hospital**: 59%
Quality ranking organizations such as HealthGrades, US News & World Report, Hospital Compare from the government 35% 34%

Consumer-driven quality rating organizations such as Angie’s List, Yelp, Vitals, and other social media sites 15% 16%

Neither 27% 26%

Not sure 23% 24%
WEBSITES VISITED
Exceptional, 23%
Acceptable, 68%
Disappointing, 5%
Not sure, 4%

Been to a hospital website in the past 3 months: 11%

Did website meet your needs?

Reasons for visiting website:
- Schedule/cancel appt.: 31%
- Get directions/contact info: 31%
- Find info about particular health service: 24%
- Find info on physician: 23%
- View my test results: 20%
- Pay/review bill: 18%
- Apply for job/review job listings: 14%
- Access hospital's patient portal: 14%
- Look up info on specific condition: 13%
- Learn more about the hospital: 12%
- Look up info/sign up for class or event: 10%
- Request medical records: 10%
- Look up info on health and wellness: 9%
- Connect to a service that provides patient updates: 7%
- Pre-register for a test or procedure: 6%
- Check ER wait times: 3%
ONLINE HEALTHCARE SHOPPING
Why purchased healthcare products online?

- Cheaper prices: 56%
- Easy to purchase: 51%
- Free shipping: 47%
- Don’t have to leave the house: 36%
- Automated refills easier online: 25%
- More selection: 25%
- Lots of positive online reviews: 10%
- My doctor recommended: 6%
- Family/friend recommended: 4%
- Faster than mail order: 3%
- HCP (not doctor) recommended: 3%
- Insurer requires it: 3%

Online sites purchased from

- Amazon: 31%
- CVS: 20%
- Walgreens: 12%
- Drugstore.com: 12%
- Express Scripts: 9%
- Walmart: 7%
- Target: 4%
- Other: 25%
- Not sure: 10%

Purchased healthcare-related products online in past year: 23%
IMPROVING YOUR BRAND’S ‘DIGITAL DIALOGUE’
Website visitor experience survey

NOT a traditional satisfaction survey; rather a brand experience improvement tool

Developed and offered jointly by Greystone.net (leading healthcare Internet consultants) and Klein & Partners (leading healthcare marketing research consultants)
Benefits

- NOT another satisfaction survey!
- Affordable
- Real-time
- ‘Brand Moment’ improvement priorities
- Easy to set up and use
- Brief survey for website visitors to take
- Client branded
- Online reporting dashboard (self-service)
- Benchmarks + statistically derived ‘success thresholds’
- Measure effects of website improvements over time
- Link the impact of the website experience to your brand
- Healthcare-only: Survey designed just for hospitals and health systems
- Designed and backed by Greystone.net and Klein & Partners
How does gSight work?

1. **We add a piece of code to your site**
   - Multiple entry points including home page
   - As much or as little tech support as you need

2. **Generates a pop-up**
   - You control when it pops up
   - You control what % of visitors get the popup

3. **User is asked to opt in/out**
   - Options: Yes, Not Now, Never
   - Closing the window = Never

4. **User takes a 14-question survey**
   - Typically takes 3-4 minutes
5. **Ongoing data collection**
   - Frequency of pop-up can be changed throughout to control flow
   - Goal: 300 completed surveys per reporting period
   - Once a year or quarterly options available

6. **Your Data Reports and Analysis**
   - View your data in an online interactive dashboard and receive a written summary report written by a healthcare research expert
   - Includes a high level analysis as well as ability to drill down
   - Includes one-to-one consulting and advice

7. **Comparative Data**
   - As the database grows, gSight is designed to show comparisons at aggregate level and by peer group
Question topics

- Reasons for visiting the website
- Frequency of visiting
- Level of improvement needed for specific ‘brand moments’
- Overall summary metrics:
  - Meeting the visitor’s needs for that visit
  - Experience compared to all other websites
  - Loyalty
  - Advocacy
  - Visit impact on overall brand impression
  - Stars
  - All interactions with brand
  - Browser and device used to complete survey
Think about your experience on this website. We'd like to get your help in prioritizing areas where we can improve the website's experience. When it came to the following, how much improvement, if any, do you think this part of the website experience needs?

4a. The usefulness of the content
- No improvement needed (fine as is)
- Minor improvement needed
- Major improvement needed
- Experienced but didn't leave enough of an impression with me to say
- Not applicable/didn't experience

4b. How easy it was to find what you were looking for
- No improvement needed (fine as is)
- Minor improvement needed
- Major improvement needed
- Experienced but didn't leave enough of an impression with me to say
- Not applicable/didn't experience

4c. The usefulness of the search function on the website
- No improvement needed (fine as is)
- Minor improvement needed
- Major improvement needed
- Experienced but didn't leave enough of an impression with me to say
- Not applicable/didn't experience

4d. The ability to interact with the website (e.g., ask questions, input information, etc.)
How gSight Works

1. Collect data
2. Analyze data
3. Provide insights

Your data
Benchmarks
Success Thresholds

gMetrics
Case Study

- **Client:** Children’s Hospital in the Midwest
- **Situation:**
  - Continuously looking to improve the Web site
  - Interested in user feedback to drive changes
  - Used internally-developed survey tools in the past
  - Excited about opportunity to see comparative data and survey tools developed by industry-focused market research professionals
  - Participated as a gSight beta client
- **Fielding of gSight:** September-October, 2014
Reasons for visit

<table>
<thead>
<tr>
<th>Reasons for visiting website</th>
<th>Your Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply for a job</td>
<td>22%</td>
</tr>
<tr>
<td>Look up info on a specific condition</td>
<td>12%</td>
</tr>
<tr>
<td>Learn more about hospital and what it offers</td>
<td>11%</td>
</tr>
<tr>
<td>Find information on a physician</td>
<td>10%</td>
</tr>
<tr>
<td>Find information on a particular health service offered</td>
<td>8%</td>
</tr>
<tr>
<td>Access hospital’s patient portal</td>
<td>6%</td>
</tr>
<tr>
<td>Look up info on a health or wellness topic</td>
<td>6%</td>
</tr>
<tr>
<td>Schedule/cancel an appointment</td>
<td>5%</td>
</tr>
<tr>
<td>Look info on/sign up for a class or event had to do</td>
<td>5%</td>
</tr>
<tr>
<td>Pay/View bill</td>
<td>4%</td>
</tr>
<tr>
<td>Get directions to hospital</td>
<td>4%</td>
</tr>
<tr>
<td>Request medical records</td>
<td>2%</td>
</tr>
<tr>
<td>View lab test results</td>
<td>2%</td>
</tr>
<tr>
<td>Make a donation</td>
<td>1%</td>
</tr>
<tr>
<td>Check ER wait times</td>
<td>1%</td>
</tr>
<tr>
<td>Connect to service providing patient updates</td>
<td>1%</td>
</tr>
<tr>
<td>Pre-register for test or procedure</td>
<td>0%</td>
</tr>
<tr>
<td>Other reason</td>
<td>29%</td>
</tr>
</tbody>
</table>

Frequency of visiting website

<table>
<thead>
<tr>
<th>Frequency of visiting website</th>
<th>Your Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>First visit</td>
<td>44%</td>
</tr>
<tr>
<td>Several times a week</td>
<td>12%</td>
</tr>
<tr>
<td>About once a week</td>
<td>5%</td>
</tr>
<tr>
<td>Couple times a month</td>
<td>8%</td>
</tr>
<tr>
<td>About once a month</td>
<td>8%</td>
</tr>
<tr>
<td>Few times a year</td>
<td>15%</td>
</tr>
<tr>
<td>Once a year or less</td>
<td>6%</td>
</tr>
<tr>
<td>Not sure</td>
<td>2%</td>
</tr>
</tbody>
</table>
### Experience improvement priorities

<table>
<thead>
<tr>
<th>Digital Brand Moment</th>
<th>Didn’t experience</th>
<th>Not memorable</th>
<th>Memorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usefulness of the content</td>
<td>7%</td>
<td>3%</td>
<td>90%</td>
</tr>
<tr>
<td>How easy it was to find what you were looking for</td>
<td>3%</td>
<td>2%</td>
<td>95%</td>
</tr>
<tr>
<td>Usefulness of the search function on the website</td>
<td>28%</td>
<td>1%</td>
<td>71%</td>
</tr>
<tr>
<td>Ability to interact with the website</td>
<td>36%</td>
<td>2%</td>
<td>62%</td>
</tr>
<tr>
<td>Finding other relevant information not initially looking for</td>
<td>32%</td>
<td>4%</td>
<td>64%</td>
</tr>
<tr>
<td>Number of clicks needed to get info searching for</td>
<td>8%</td>
<td>0%</td>
<td>92%</td>
</tr>
<tr>
<td>How quickly the pages loaded</td>
<td>3%</td>
<td>0%</td>
<td>97%</td>
</tr>
<tr>
<td>All links working properly</td>
<td>14%</td>
<td>1%</td>
<td>85%</td>
</tr>
<tr>
<td>How visually appealing the website was</td>
<td>1%</td>
<td>1%</td>
<td>98%</td>
</tr>
<tr>
<td>How clear and easy to read the text was</td>
<td>1%</td>
<td>0%</td>
<td>99%</td>
</tr>
<tr>
<td>How quickly the videos loaded and ran</td>
<td>64%</td>
<td>1%</td>
<td>35%</td>
</tr>
</tbody>
</table>

### Memorable enough to say

<table>
<thead>
<tr>
<th>Your Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major improvement needed</td>
</tr>
<tr>
<td>Minor improvement needed</td>
</tr>
<tr>
<td>No improvement needed</td>
</tr>
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</tr>
<tr>
<td>No improvement needed</td>
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</table>

### Memorable enough to say

<table>
<thead>
<tr>
<th>Your Score</th>
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</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>Minor improvement needed</td>
</tr>
<tr>
<td>No improvement needed</td>
</tr>
</tbody>
</table>
How do we set improvement priorities?

Website experience improvement priority matrix

Fix These!

Monitor

- Ability to interact with the website
- Easy to find what you're looking for
- How quickly the videos loaded and ran
- How clear and easy to read the text was

Low gain

- Keep up the good work!

Memorable experience

Needs improvement*

* Percent major + minor improvement scores combined
How many stars?

<table>
<thead>
<tr>
<th>Overall number of stars awarded to website</th>
<th>Mean score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client score</td>
<td>4.17</td>
</tr>
<tr>
<td>Post-beta launch</td>
<td></td>
</tr>
<tr>
<td>Benchmark</td>
<td>3.50</td>
</tr>
<tr>
<td>Success Threshold</td>
<td>4.00</td>
</tr>
</tbody>
</table>
Meeting visitors’ needs

How well website met needs

**gSight**
- Exceptional: 42%
- Acceptable: 50%
- Disappointing: 8%

How well website met needs

**National Omnibus**
- Exceptional: 24%
- Acceptable: 71%
- Disappointing: 5%


**Website compared to other sites**

- Better than most: 50%
- About the same as most: 41%
- Worse than most: 4%
- Not sure: 5%

**Use this website again**

- Use again because useful: 62%
- Use again because have to: 24%
- Not use again because no need to: 10%
- Not use again because not useful: 4%
- Not sure: 5%

**Recommended this website**

- Recommended: 30%
- No, don't like it: 5%
- No, just don't recommend things: 8%
- No but would if came up: 57%

---

...in comparison

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Website’s impact on overall brand impression

- Positively changed: 30%
- Not changed: 67%
- Negatively changed: 3%

Other brand ‘contact points’

- Visited its Facebook page: 19%
- Liked its Facebook page: 18%
- Followed it on Twitter: 3%
- Followed it on Instagram: 3%
- Followed it on Pinterest: 1%
- Followed it on Google+: 2%
- Called the hospital or ‘call center’: 25%
- Downloaded a mobile app from this: 8%
- Signed up for the patient portal: 11%
- Emailed my doctor’s office: 6%
- Been a patient there: 16%
- Visited a patient there: 17%
- Recommended it to a friend/family member: 25%
- None of these: 38%
Product Status

- **Beta Phase Complete**
- **Start-up Phase begins now**
  - Signing up clients now and survey can start as soon as you like
  - Special pricing through the end of the year
- **Continuing development**
  - Back end reporting tool available 4Q 2014
  - Peer Group evolution throughout 1Q 2015
- **Future**
  - Intranet experience
  - Patient portal experience
  - Foundation experience
  - Custom questions
  - Integration with gMetrics
How Can I Get Started?

❖ Learn more and/or sign up:
  ❑ Greystone Booth
  ❑ Our web sites:
    • www.greystone.net
    • www.kleinandpartners.com
  ❑ Contact us:
    • Mike Schneider – mschneider@Greystone.net or 770-407-7675
    • Rob Klein – rob@kleinandpartners.com or 630-455-1773
Thank You!

Questions & Answers