



# Unmasking the eHealth Consumer

Presented at:

Insights 2014: Client Conference

Presented by:

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November 2, 2014



## Agenda

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- ❖ 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'*



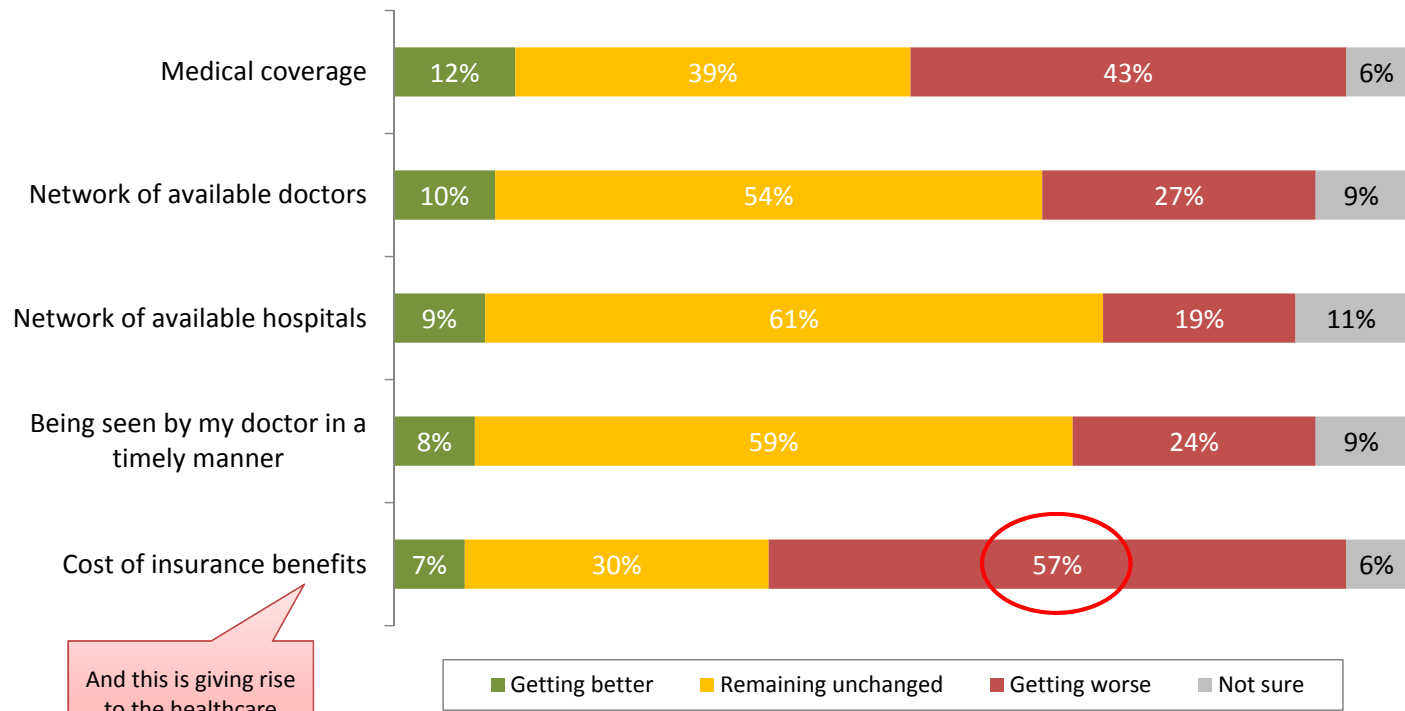




## REACTIONS TO HEALTH REFORM



### What's getting better or worse for you under healthcare reform?



And this is giving rise to the healthcare 'customer.'





## PRIMARY CARE PHYSICIAN



82%



Primary Care Physician

Going online to rate a physician or hospital has doubled in the past few years:

**6% in 2009**

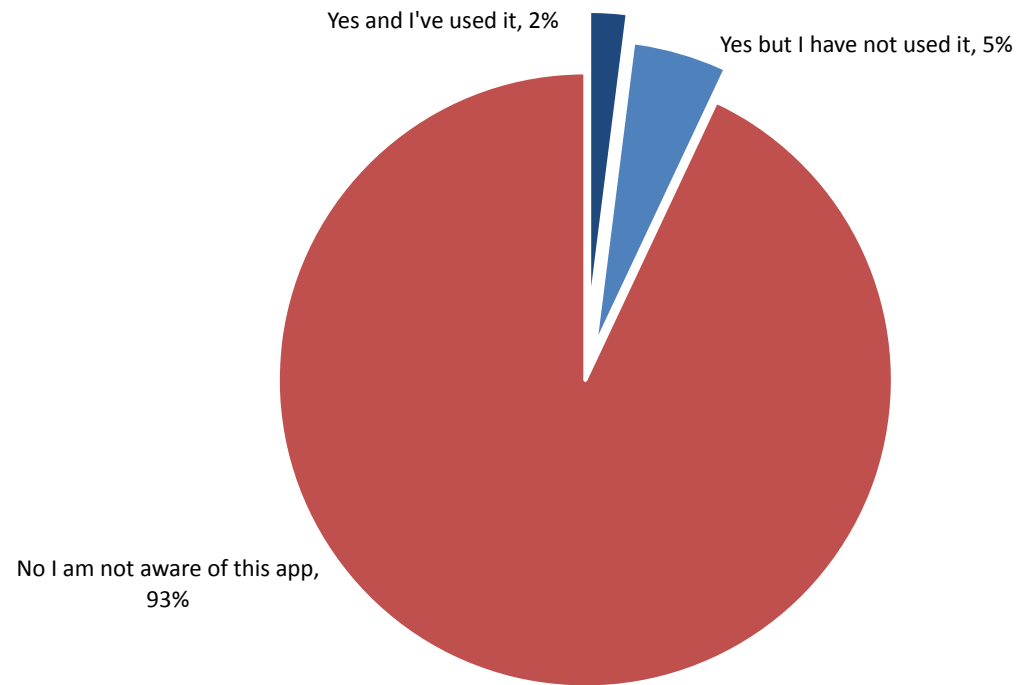
- 9% in 2011
- 14% in 2012
- 12% in 2013

**12% in 2014**



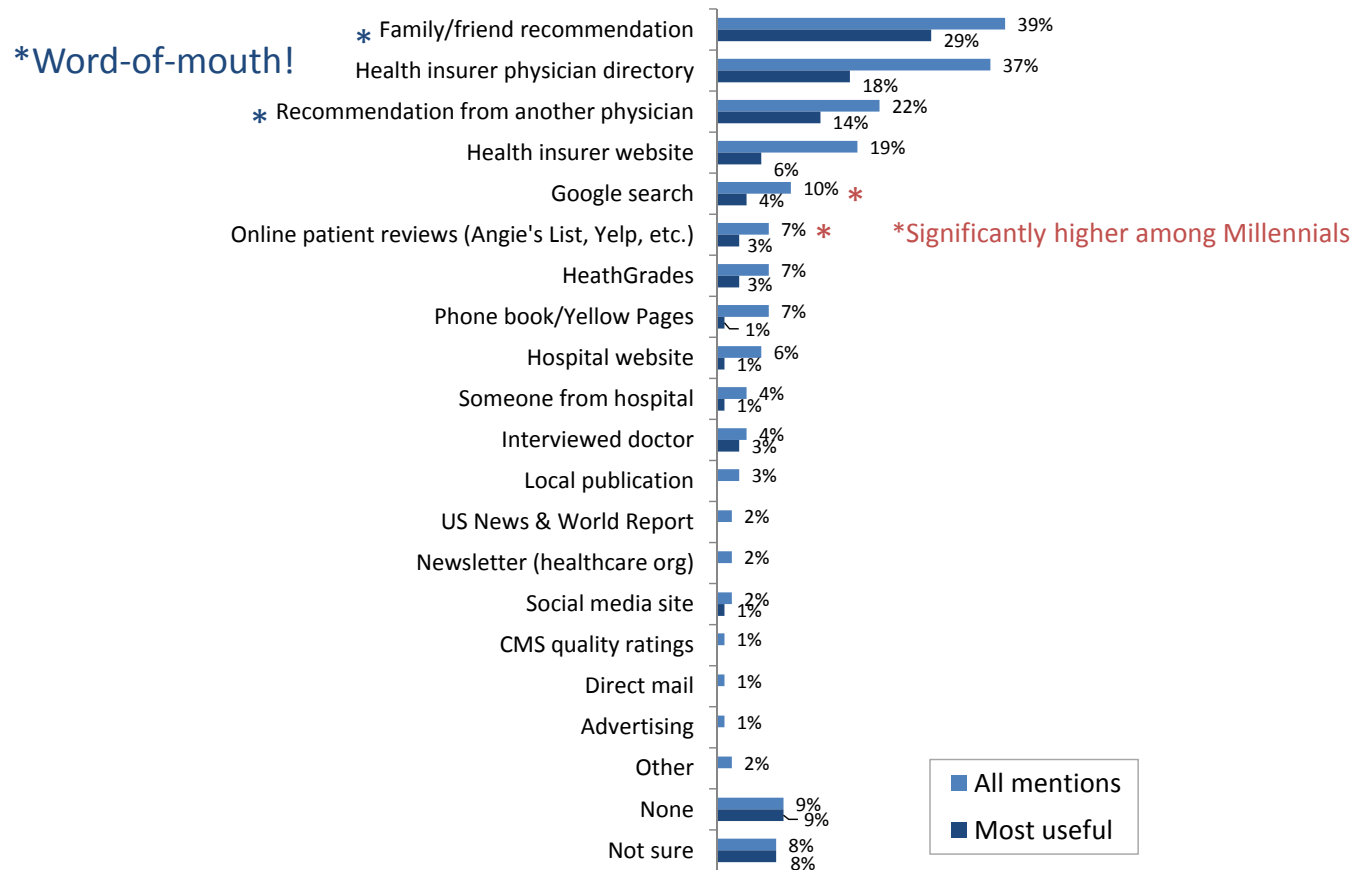


### Aware of ZocDoc





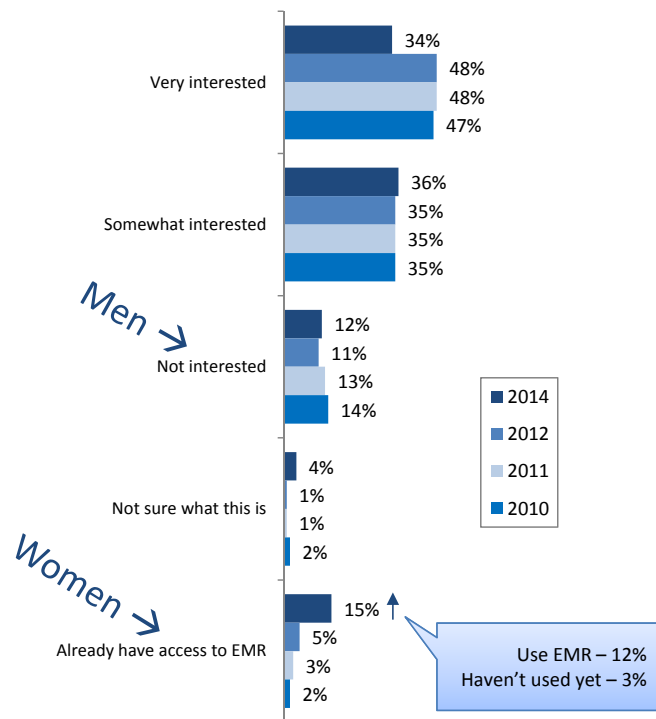
### Most useful information sources for physician choice



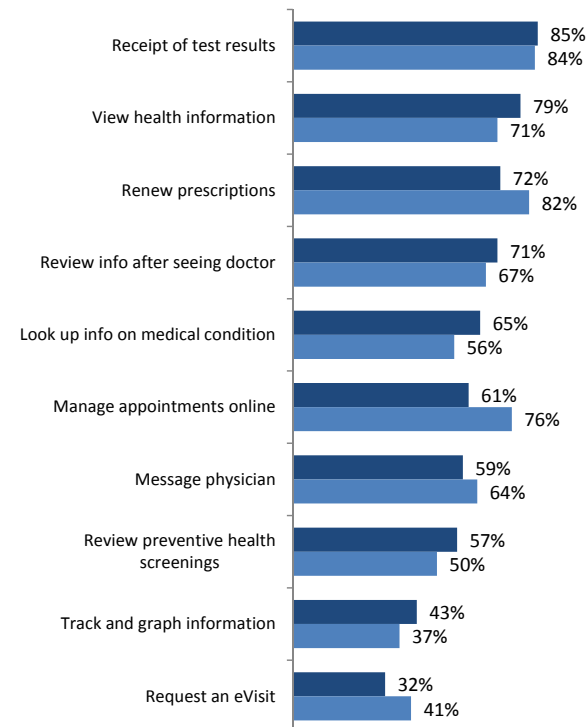




### Interest in having online access to your electronic medical record



### Very interested in accessing via electronic medical record





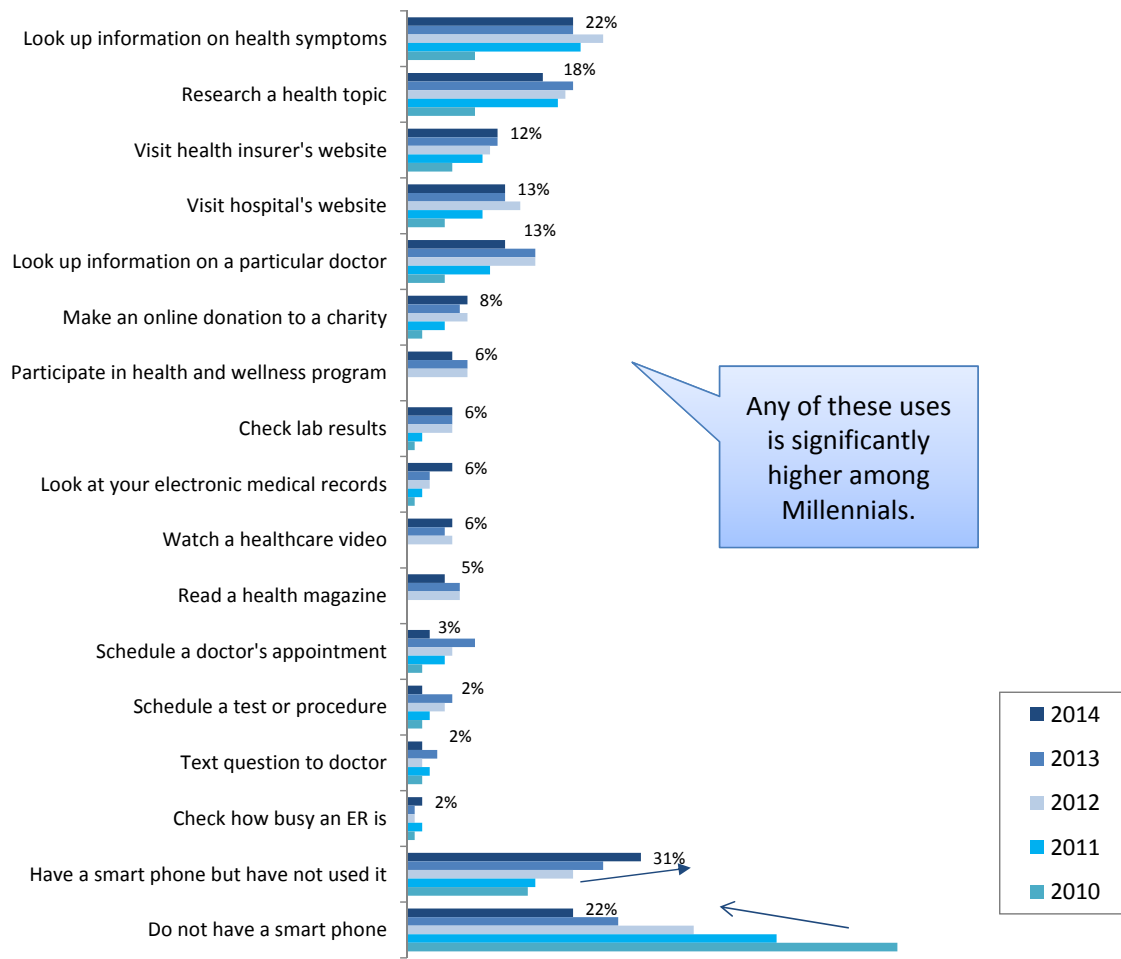


## SMART PHONES

*'Can you hear me now?'*



### Current health-related smart phone uses



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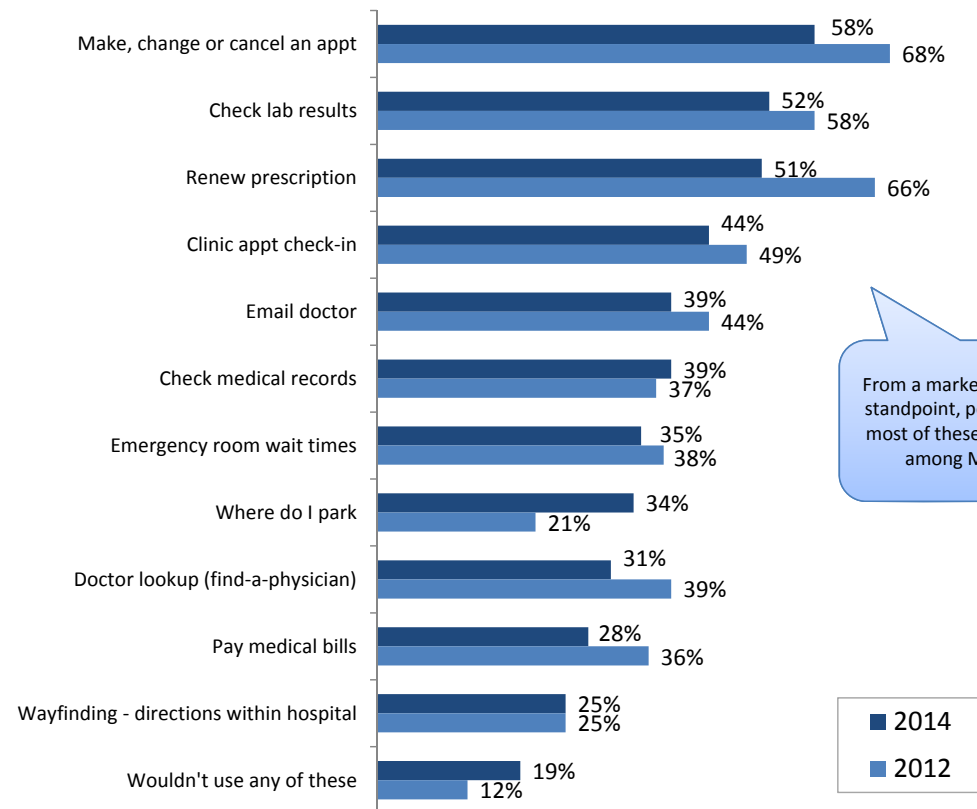


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### Hospital Apps most likely to use (Among the 72% with a smart phone)

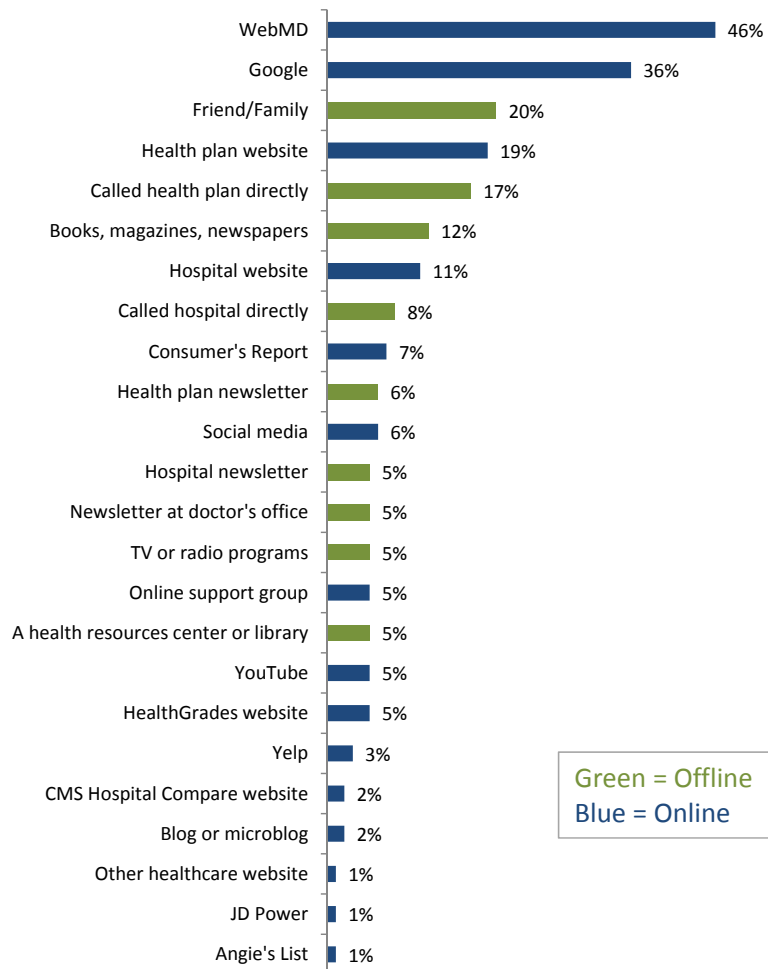




## INTEREST IN INFORMATION SOURCES

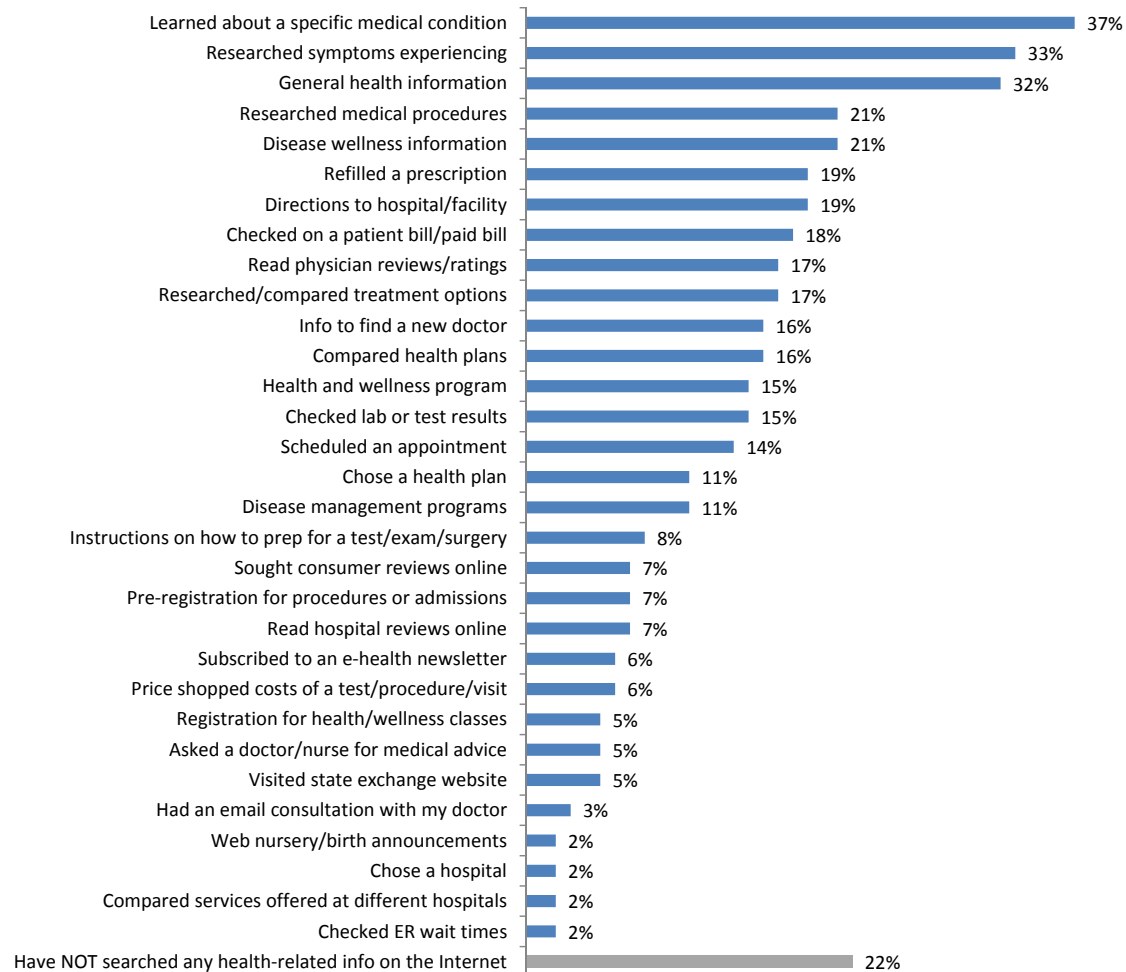


### Sources of health-related information sought in past year





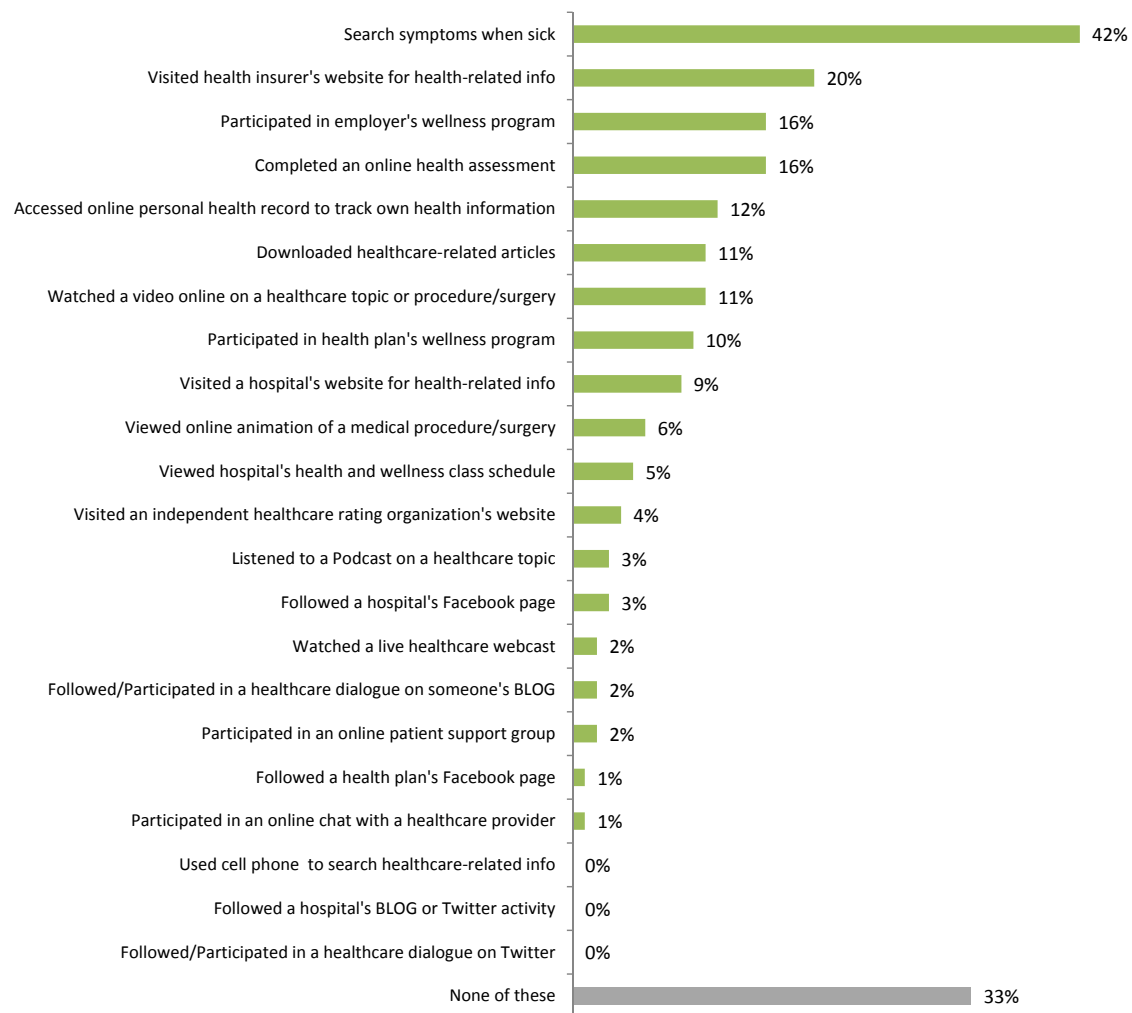
## Health related information sought on the Internet







## Recent participation in online health-related activities



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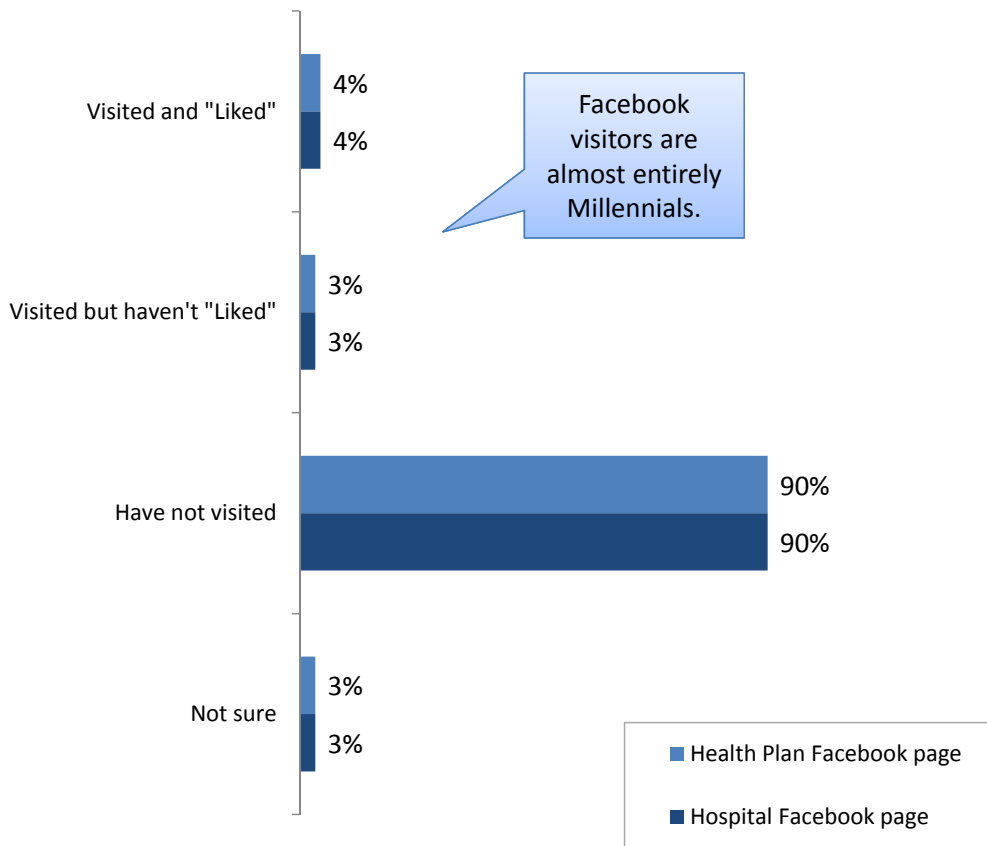
  
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## COMMUNICATON METHODS

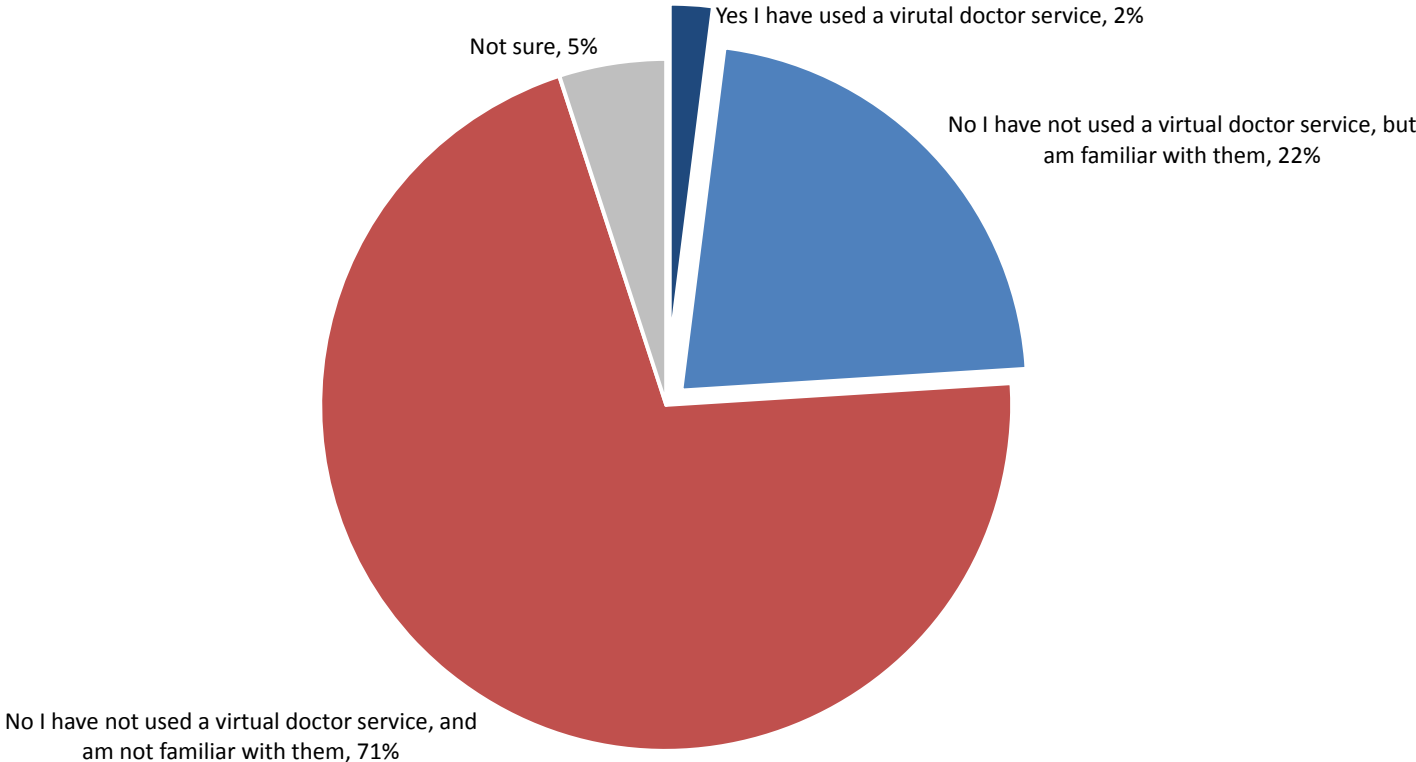


### Visiting/Liking health plan or hospital Facebook pages





Ever had a virtual doctor visit?





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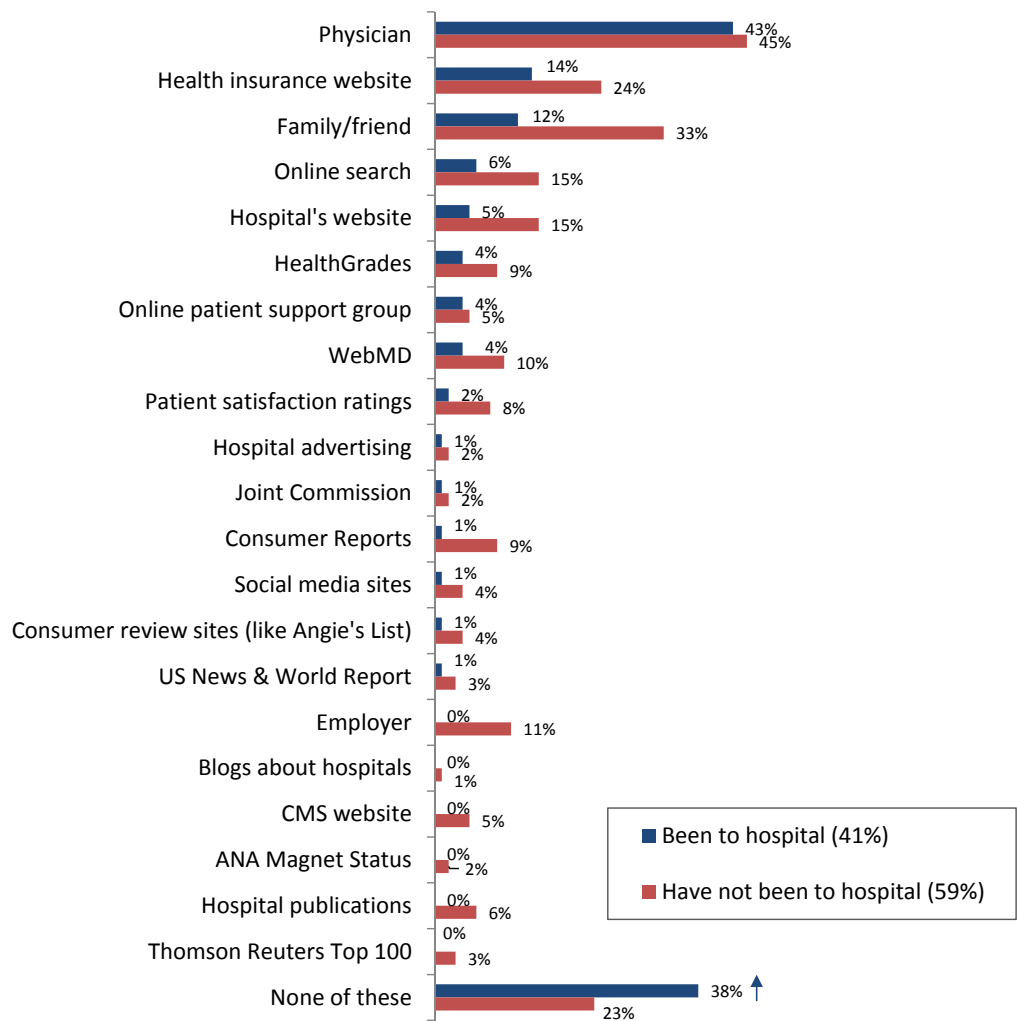
  
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## CHOOSING A HOSPITAL



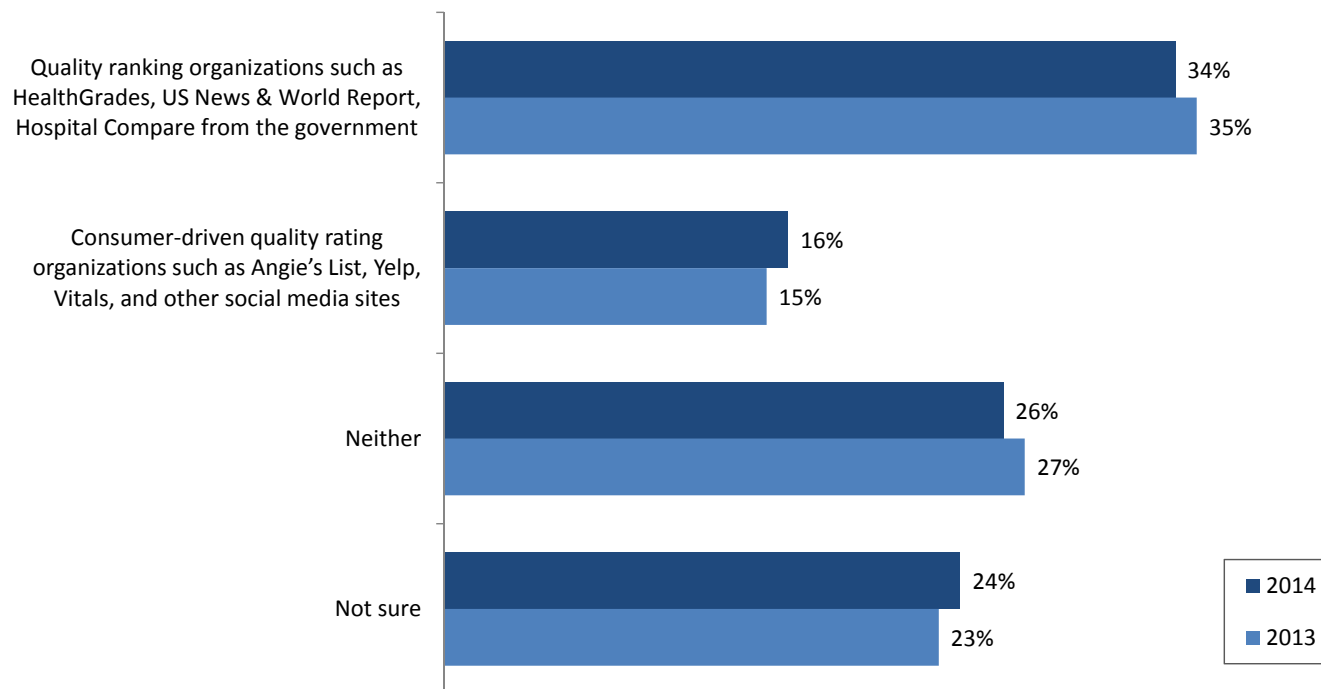
### Hospital choice factors by hospital experience







### Most useful information for hospital decision

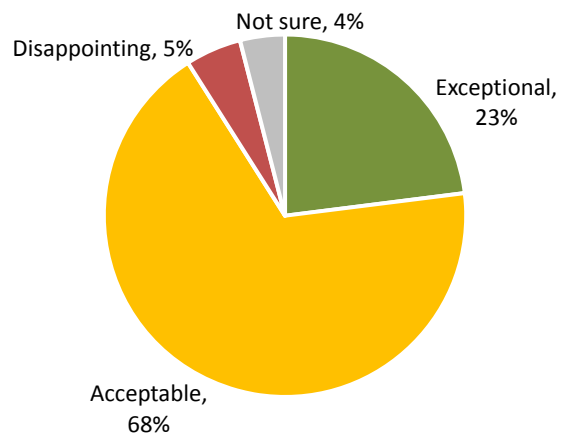




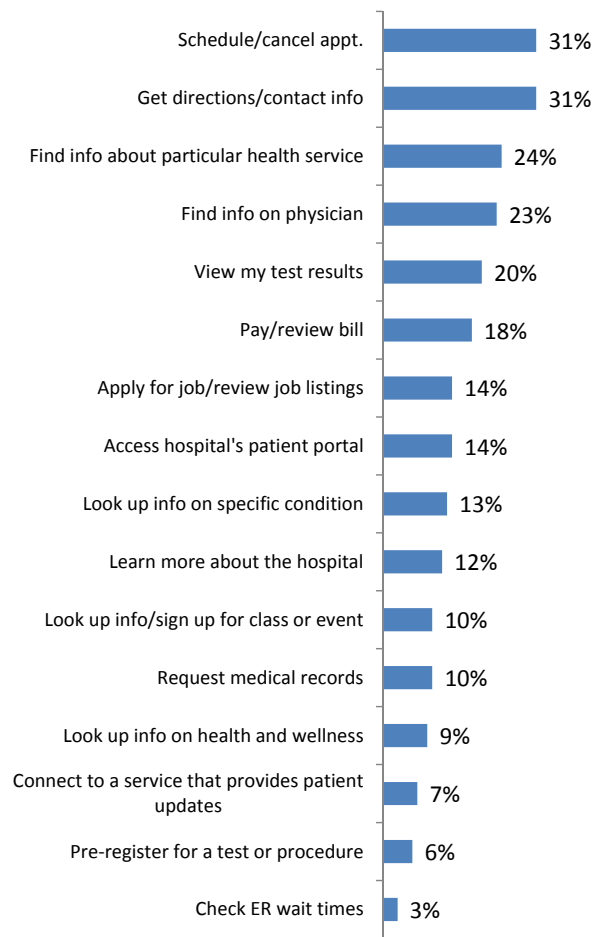
## WEBSITES VISITED



### Did website meet your needs?



### Reasons for visiting website





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## ONLINE HEALTHCARE SHOPPING

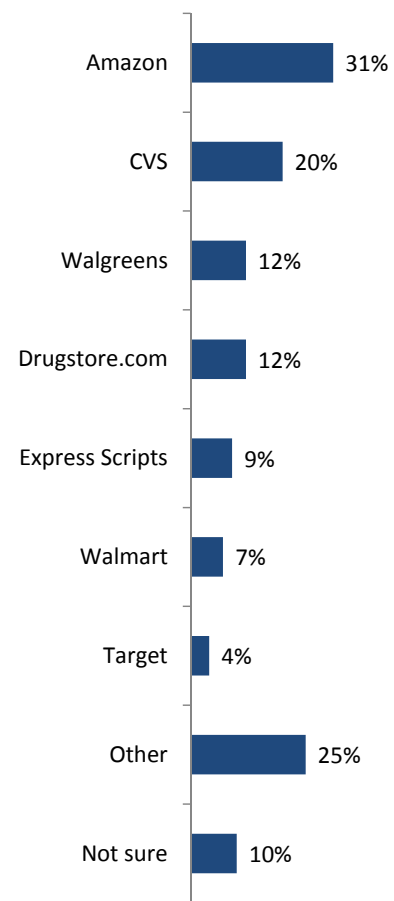


### Why purchased healthcare products online?



Purchased healthcare-related products online in past year:  
**23%**

### Online sites purchased from





# 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

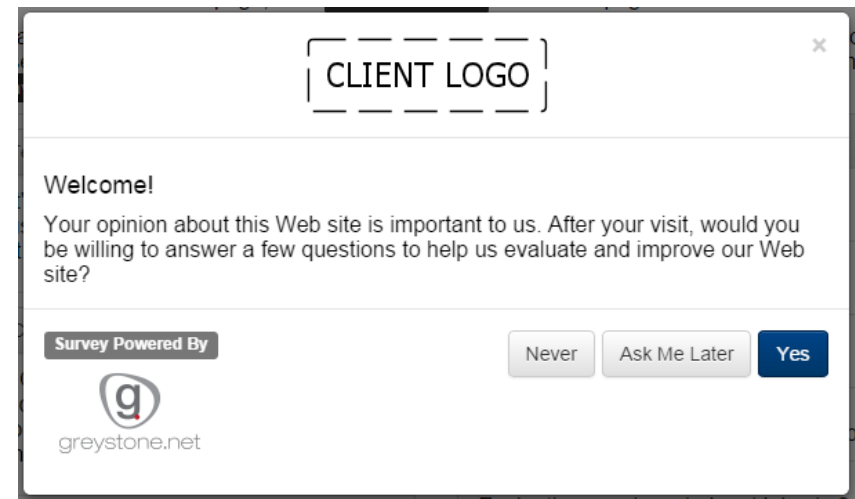
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- ❖ NOT another satisfaction survey!
- ❖ Affordable
- ❖ Real-time
- ❖ 'Brand Moment' improvement priorities
- ❖ Easy to set up and use
- ❖ Brief survey for website visitors to take
- ❖ Client branded
- ❖ Online reporting dashboard (self-service)
- ❖ 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



- 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

## How does gSight work?





## How does gSight work?

### 5. Ongoing data collection

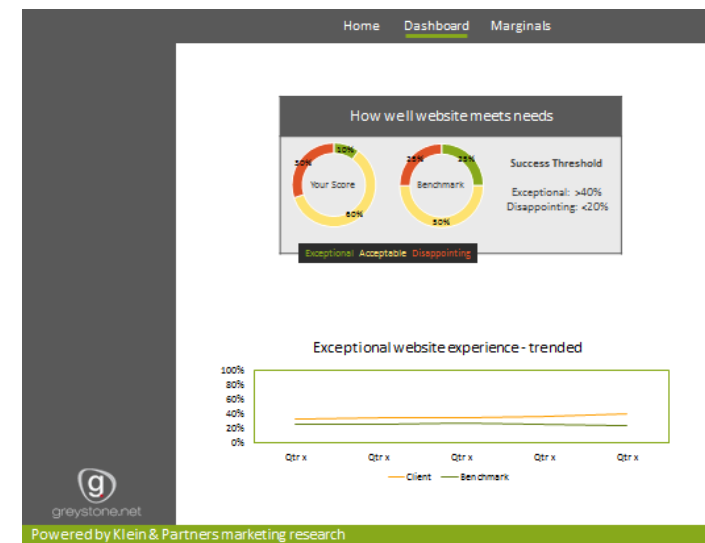
- Frequency of pop-up can be changed throughout to control flow
- Goal: 300 completed surveys per reporting period
- Once a year or quarterly options available

### 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

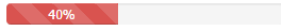
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- ❖ **Reasons for visiting the website**
- ❖ **Frequency of visiting**
- ❖ **Level of improvement needed for specific 'brand moments'**
- ❖ **Overall summary metrics:**
  - ✓ Meeting the visitor's needs for that visit
  - ✓ Experience compared to all other websites
  - ✓ Loyalty
  - ✓ Advocacy
  - ✓ Visit impact on overall brand impression
  - ✓ Stars
  - ✓ All interactions with brand
  - ✓ Browser and device used to complete survey



## Example question

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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 this 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**

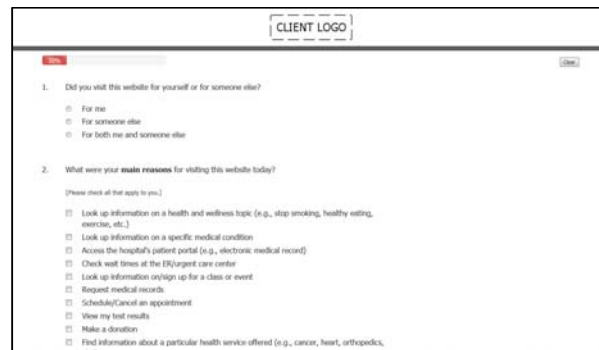
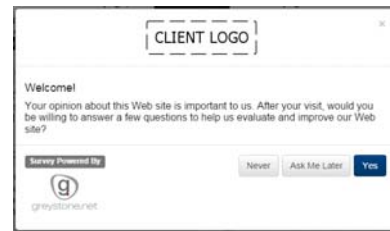
- No improvement needed (fine as is)
- Minor improvement needed
- Major improvement needed
- Experienced but didn't leave enough of an impression with me to say
- Not applicable/didn't experience

4c. **The usefulness of the search function on the website**

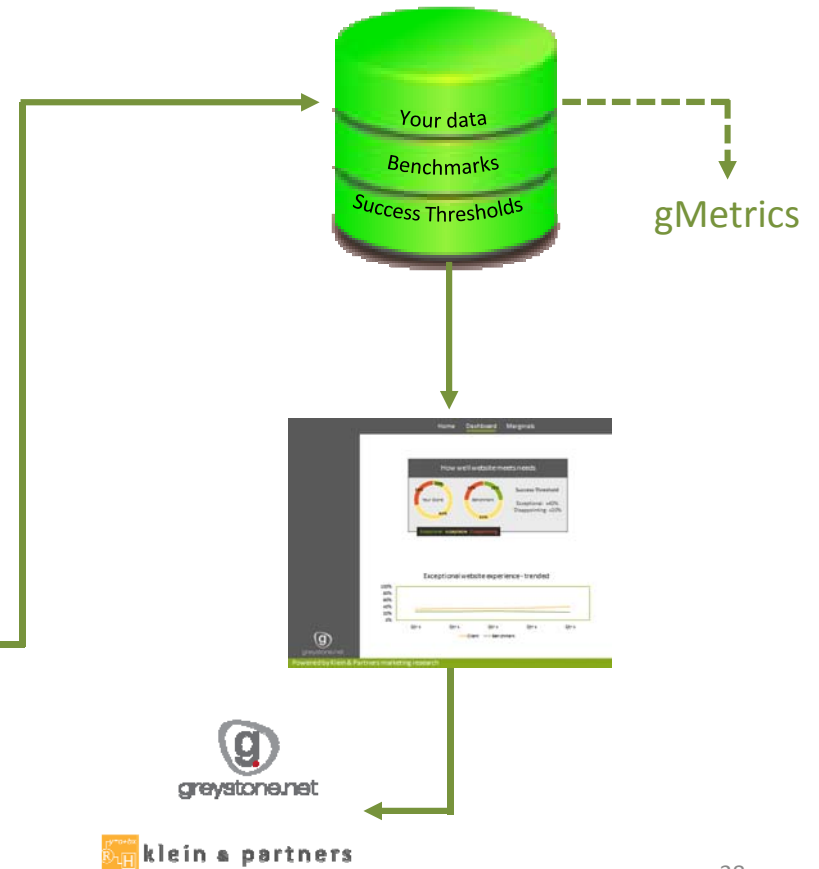
- No improvement needed (fine as is)
- Minor improvement needed
- Major improvement needed
- Experienced but didn't leave enough of an impression with me to say
- Not applicable/didn't experience

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





## How gSight Works



## Case Study

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

## Reasons for visit

Frequency of visiting website	Your Score
First visit	44%
Several times a week	12%
About once a week	5%
Couple times a month	8%
About once a month	8%
Few times a year	15%
Once a year or less	6%
Not sure	2%



# Experience improvement priorities

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

Memorable enough to say	Your Score
Major improvement needed	<b>8%</b>
Minor improvement needed	<b>22%</b>
No improvement needed	70%

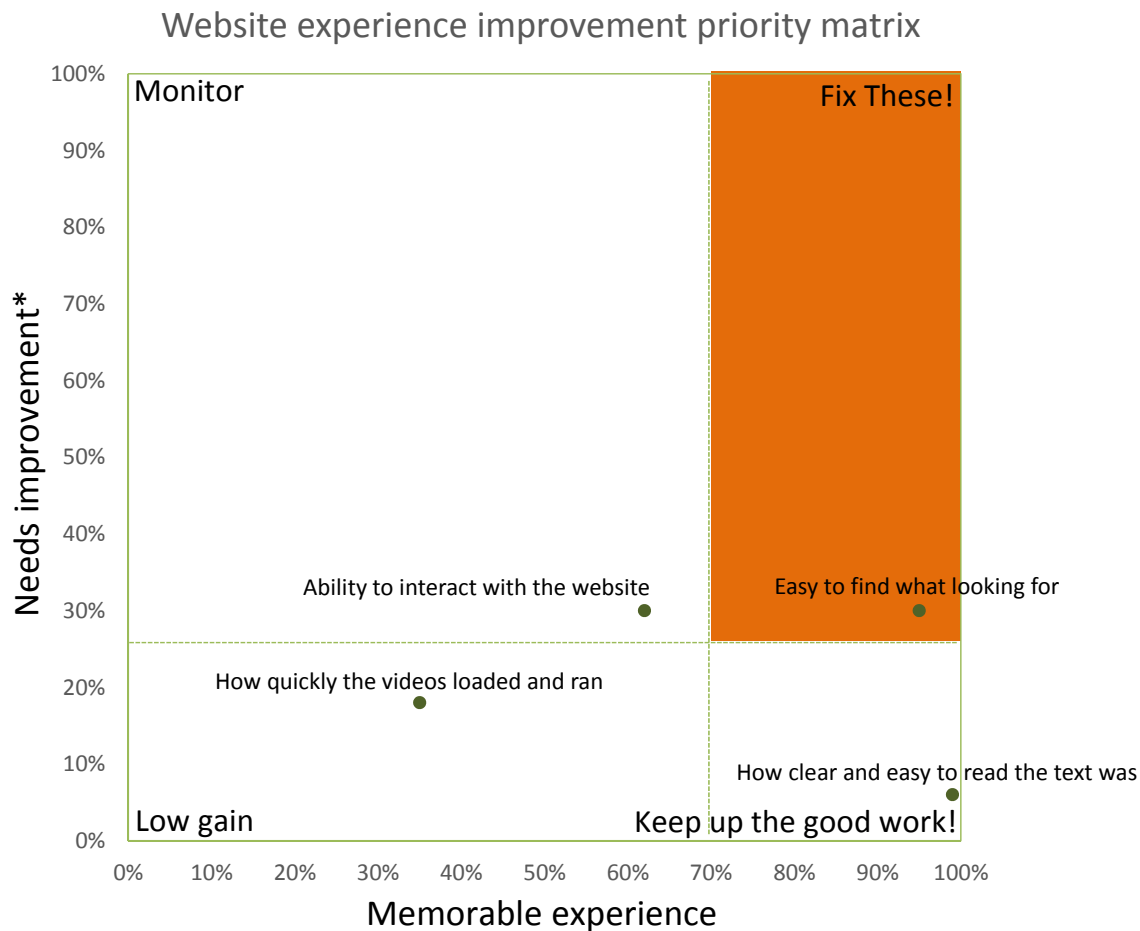
Memorable enough to say	Your Score
Major improvement needed	<b>10%</b>
Minor improvement needed	<b>20%</b>
No improvement needed	70%

Memorable enough to say	Your Score
Major improvement needed	<b>4%</b>
Minor improvement needed	<b>14%</b>
No improvement needed	82%

Memorable enough to say	Your Score
Major improvement needed	<b>0%</b>
Minor improvement needed	<b>6%</b>
No improvement needed	94%



# How do we set improvement priorities?



\* Percent major + minor improvement scores combined



## How many stars?

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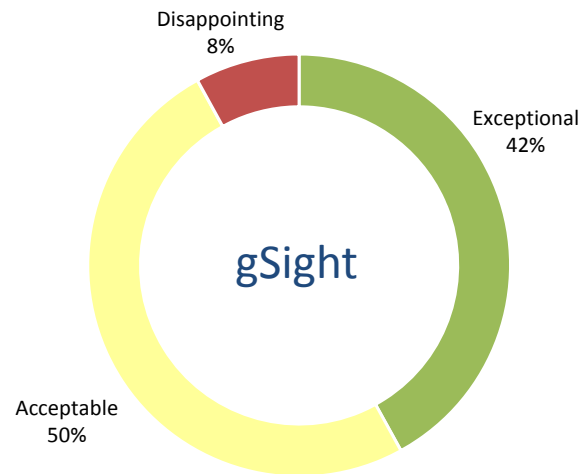
	Overall number of stars awarded to website	Mean score
Client score	☆☆☆☆☆	4.17
Post-beta launch		
Benchmark	☆☆☆☆	3.50
Success Threshold	☆☆☆☆	4.00



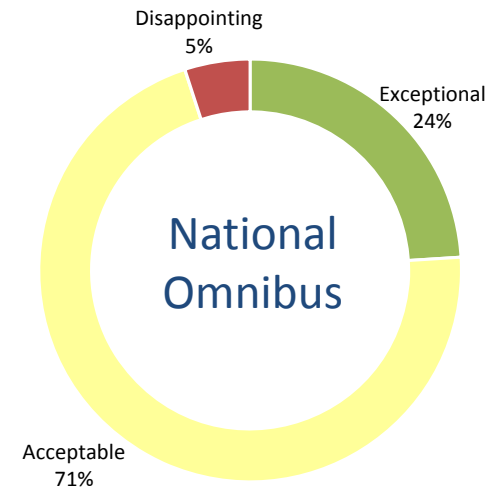


## Meeting visitors' needs

How well website met needs

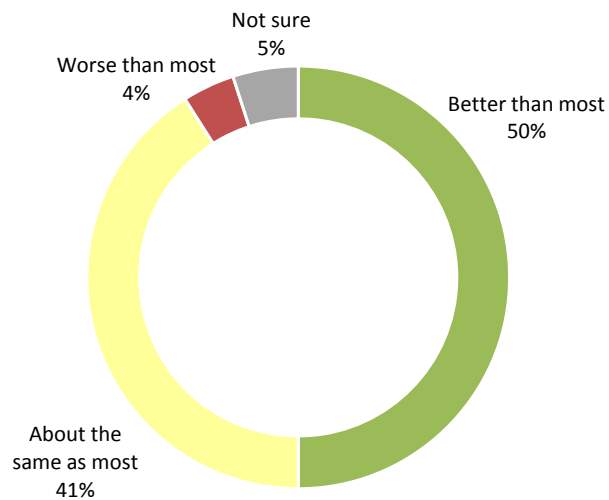


How well website met needs



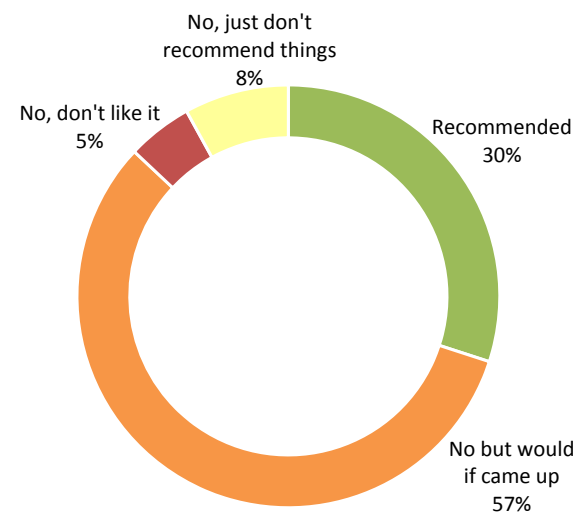


### Website compared to other sites

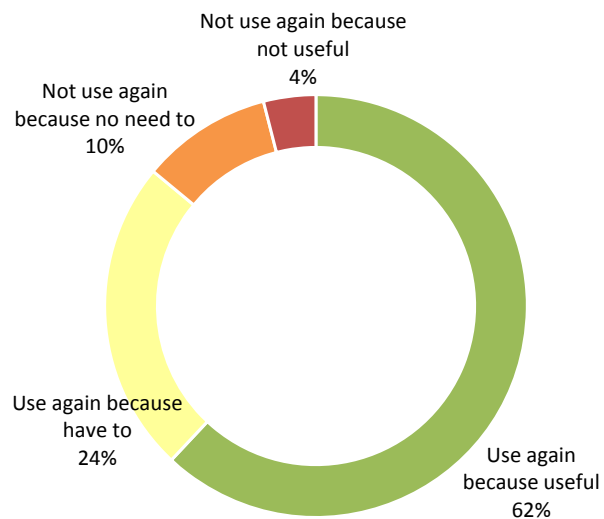


## ...in comparison

### Recommended this website



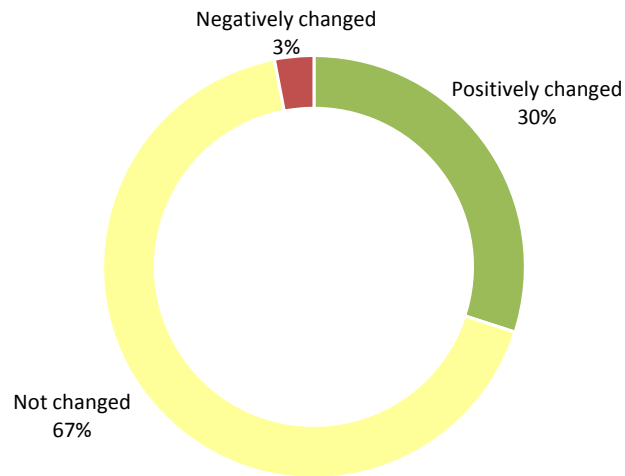
### Use this website again



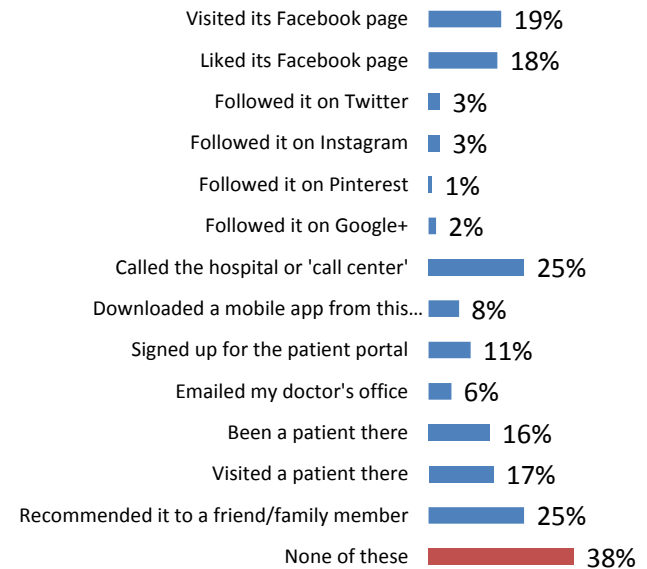


# The brand dialogue

## Website's impact on overall brand impression



## Other brand 'contact points'





## Product Status

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- ❖ **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?

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### ❖ Learn more and/or sign up:

- Greystone Booth
- Our web sites:
  - [www.greystone.net](http://www.greystone.net)
  - [www.kleinandpartners.com](http://www.kleinandpartners.com)
- Contact us:
  - Mike Schneider – [mschneider@Greystone.net](mailto:mschneider@Greystone.net) or 770-407-7675
  - Rob Klein – [rob@kleinandpartners.com](mailto:rob@kleinandpartners.com) or 630-455-1773



**Thank You!**

**Questions & Answers**