

Geonetric Consumer Health Survey

Getting a consumer perspective
on healthcare's digital front door



70+

Clients

Trusted by the top
health systems and
hospitals

500+

Digital Experiences

Delivering meaningful and
compelling user-focused design
and development

20+

Years

Dedication to the
healthcare industry

Our Services



Digital Strategy



User Experience
& Design



Content Management
Systems



Content Services



Search Engine
Optimization



Digital Advertising





Webinar Best Practices

Speakerphone tip

Mute your microphone for best audio quality.

Have questions?

We'll try to answer as many as possible. Enter them in the Q&A field.

We love feedback

Please complete the survey at the end of the webinar.

We're recording

Video of today's webinar will be posted on [geonetric.com](https://www.geonetric.com) in the Ideas section.

Download the Results of the 2022 Consumer Health Survey

Craft Your Organization's Digital Front Door Strategy

geonetric.com/2022-consumer-survey



Today's Presenter



Ben Dillon, MBA

Chief Strategy Officer, Geonetric

Geonetric Consumer Health Survey

Getting a consumer perspective
on healthcare's digital front door



The Trends Driving Change

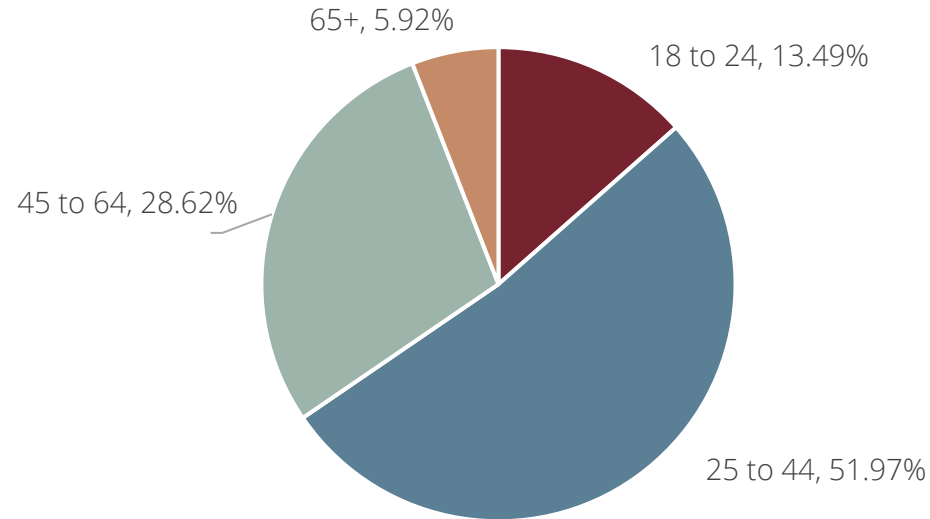


Digital Front Door





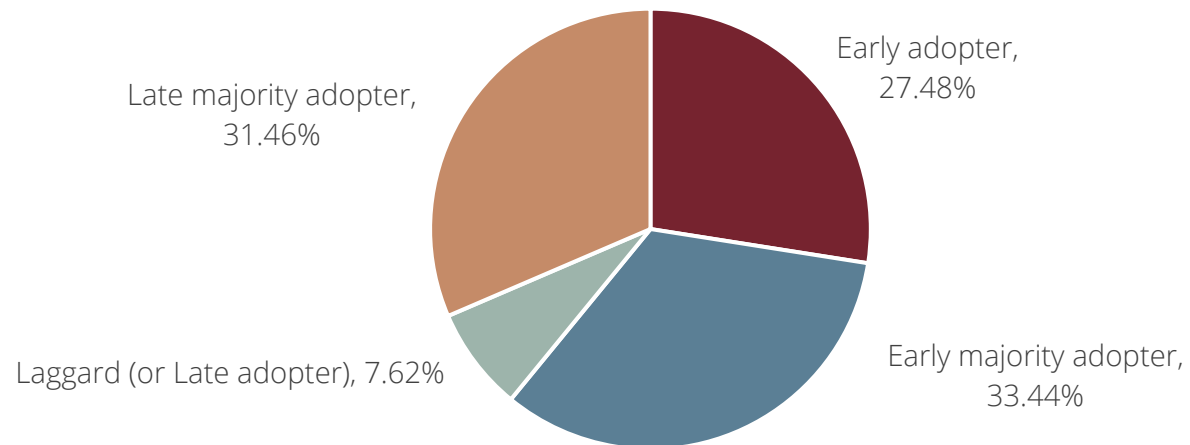
Age of Respondents



We surveyed 601 healthcare consumers.

But consumers aren't all the same.

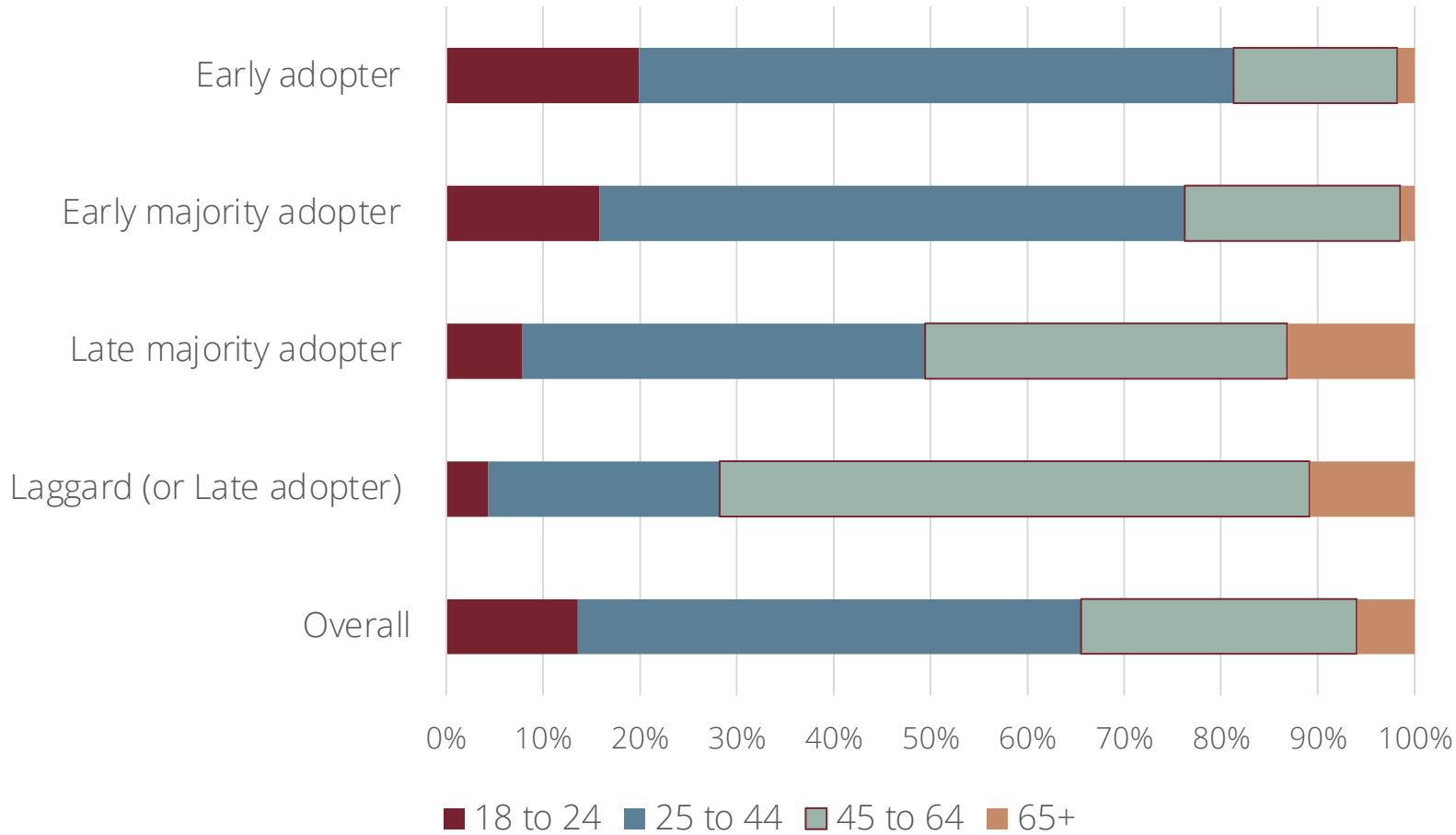
When it comes to adopting new technologies, I consider myself to be a(n):



There are distinctive behavioral groups found in age and technology adoption.



Age Group Distribution for Tech Adoption

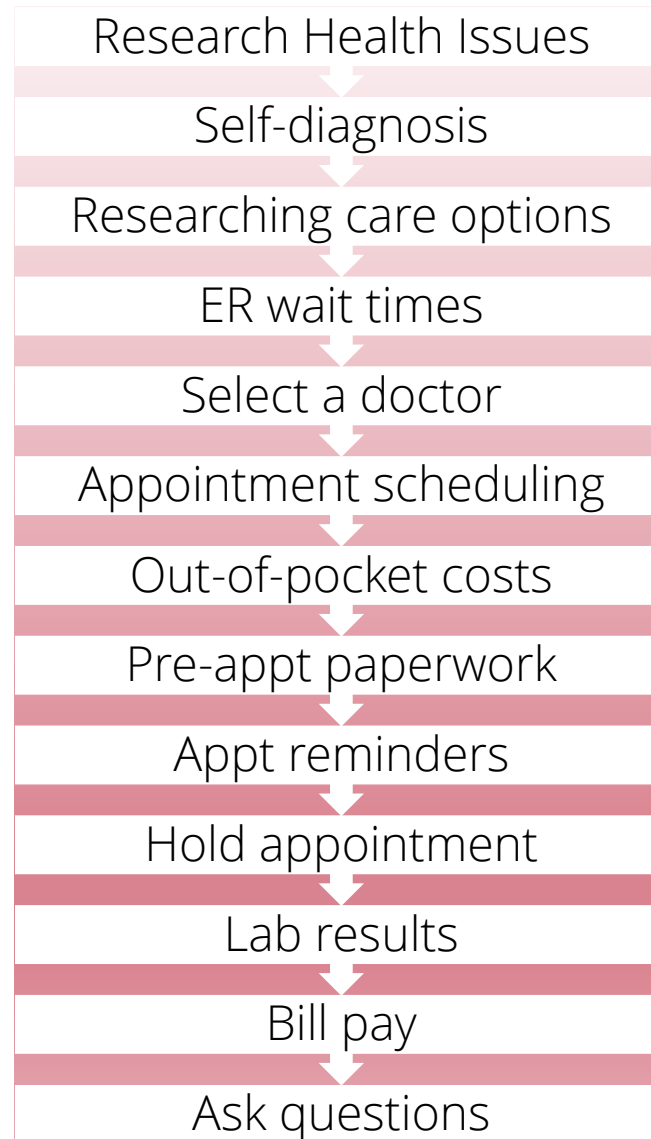


Average Age	
Early adopter	36
Early majority adopter	38
Late majority adopter	46
Laggard (or Late adopter)	50
Overall	41

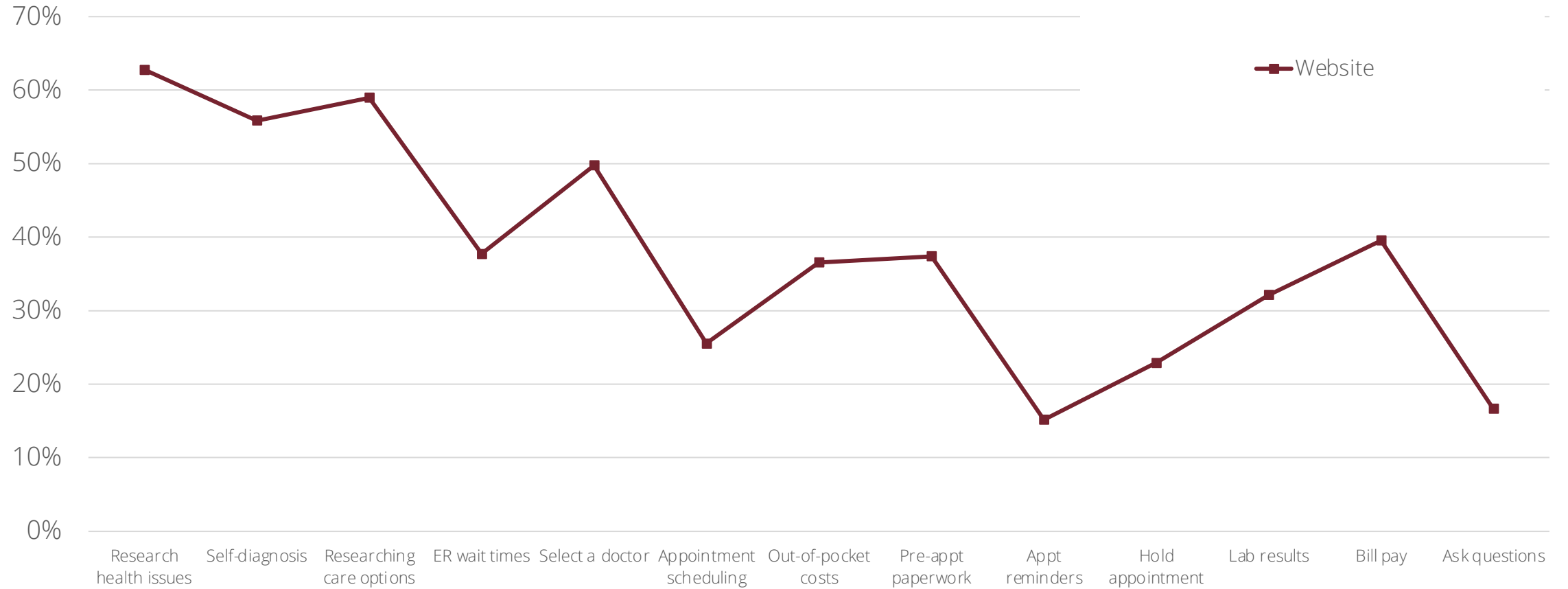
Let's Begin with a Journey



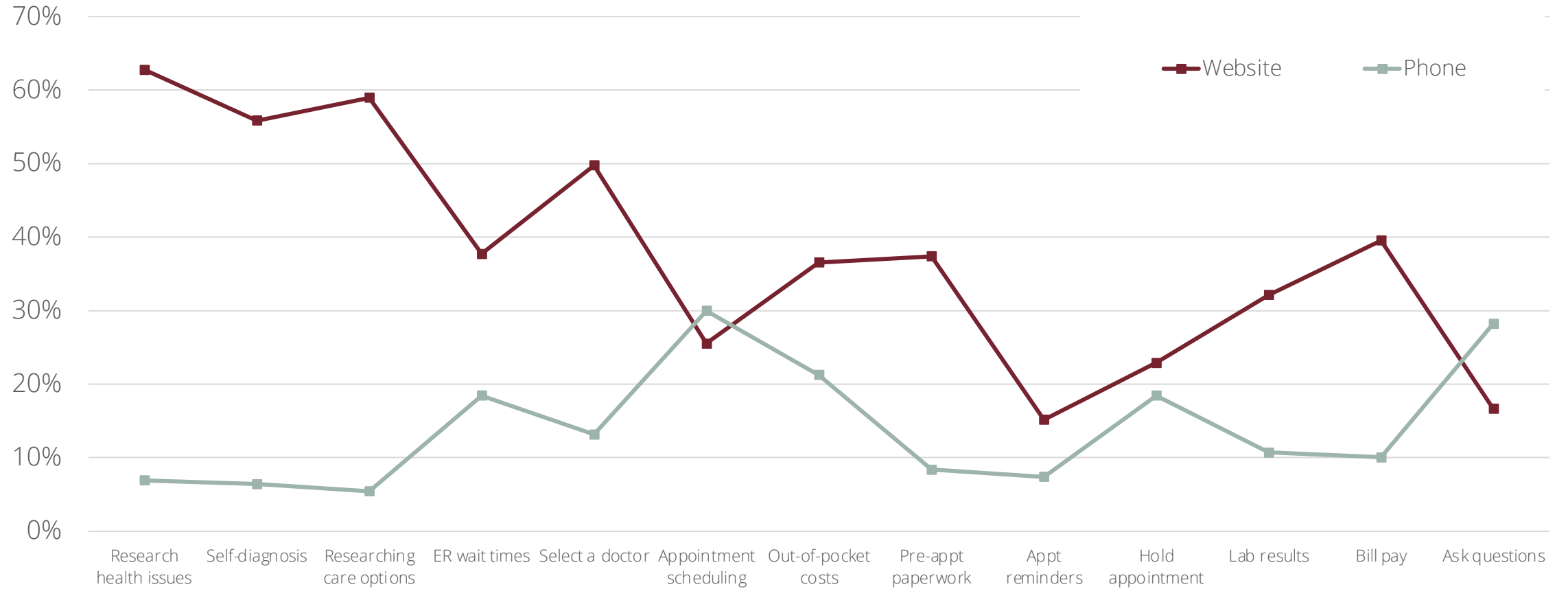
A Typical Healthcare Journey...



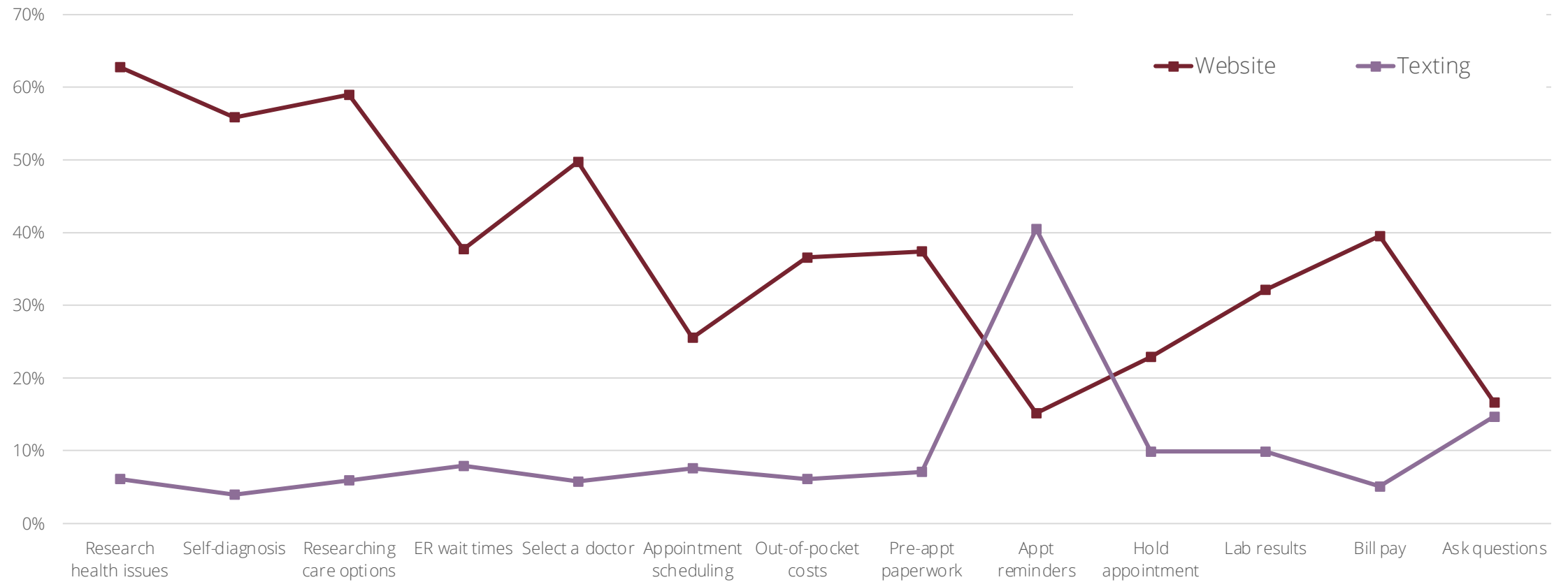
Preferred Interaction Channels



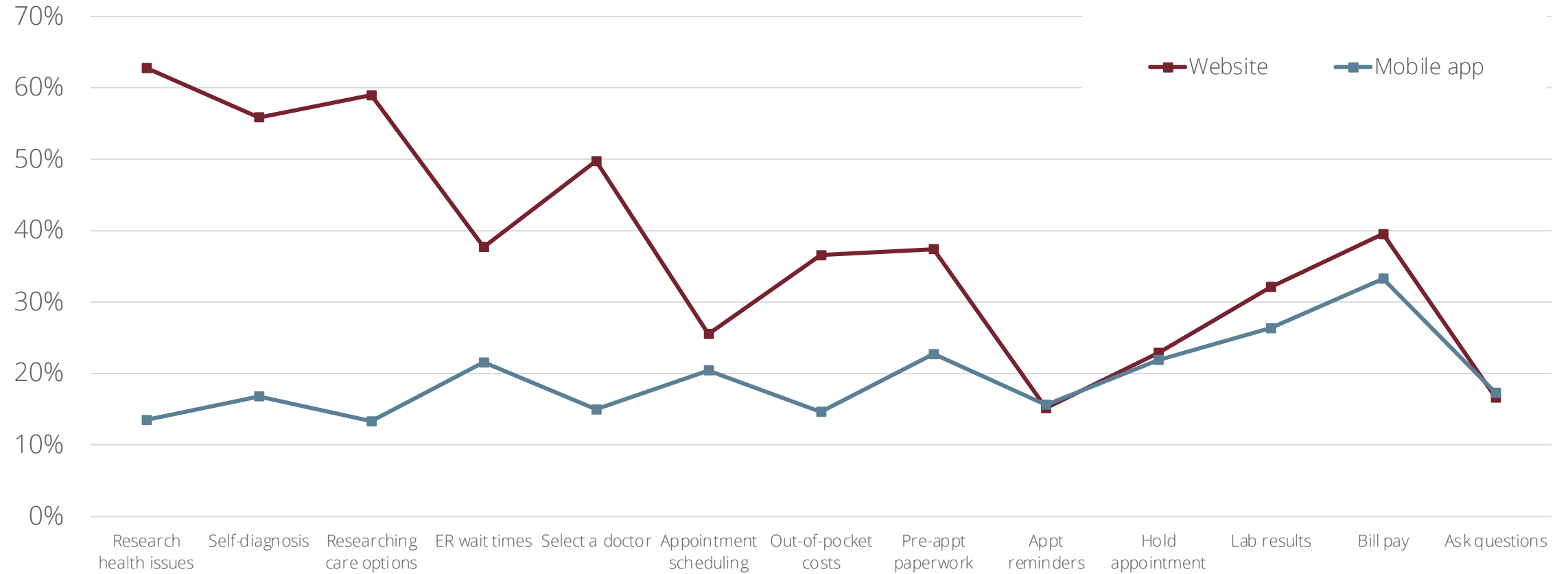
Preferred Interaction Channels



Preferred Interaction Channels



Preferred Interaction Channels



What This Means to You...

- Use the right channel for the job!
- Support as much of the entire journey as possible through the web
- In particular, make sure you've got strong support for researching and shopping tasks through the web
- Look to other channels at points where consumers think they make the most sense – Apps for patient activities, messaging for reminders and provider office questions, etc.



Researching Health Info

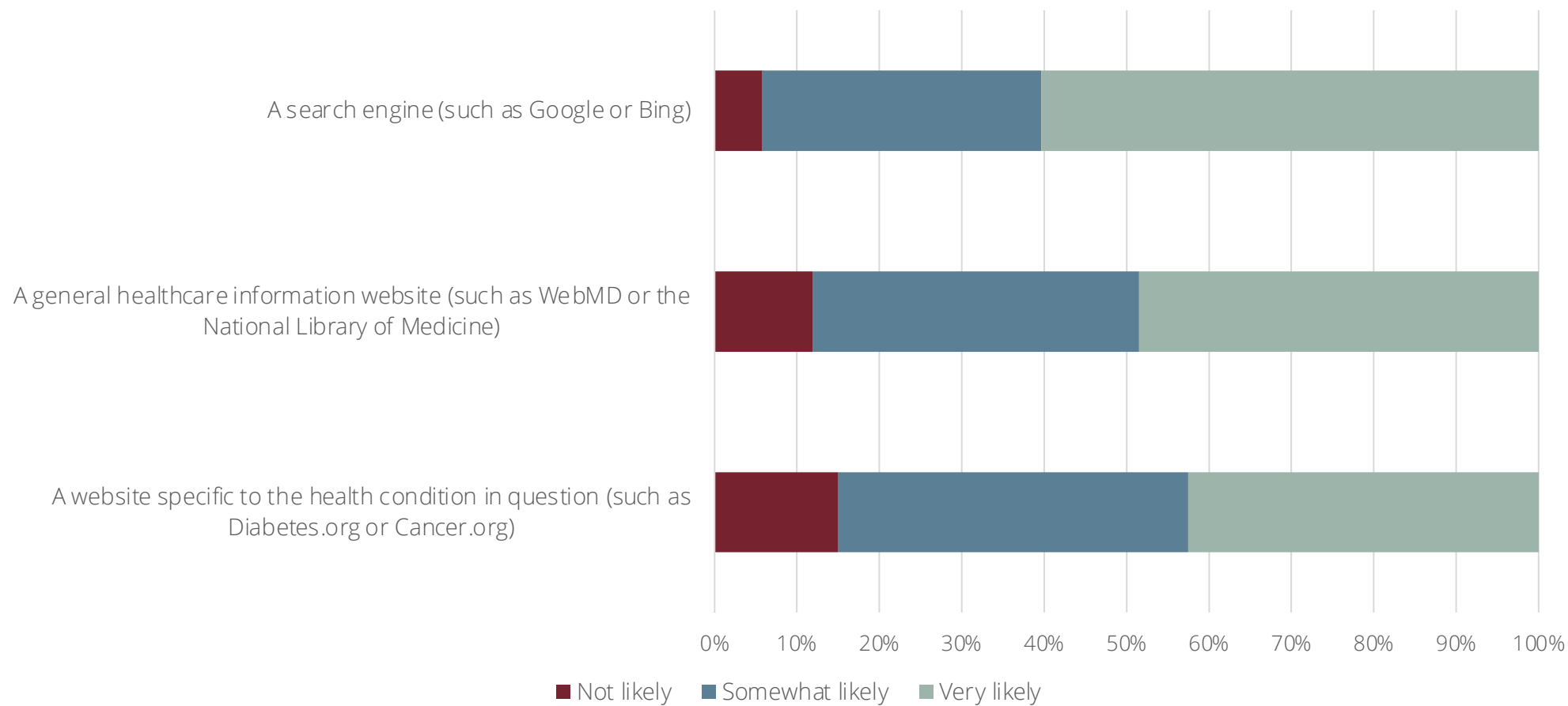


When researching health conditions 
online, how likely are you to use each of
the following?

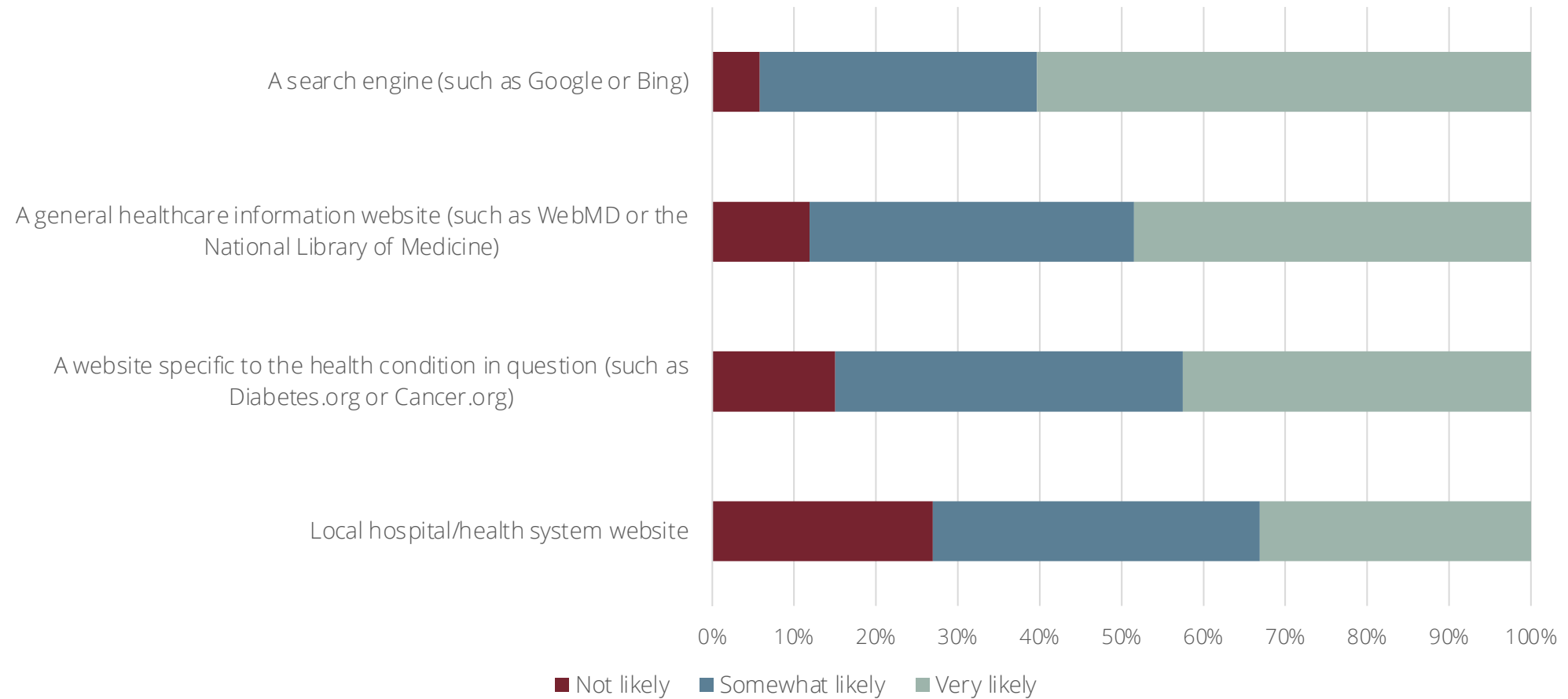
94%

Are Somewhat or Very Likely to use
A search engine

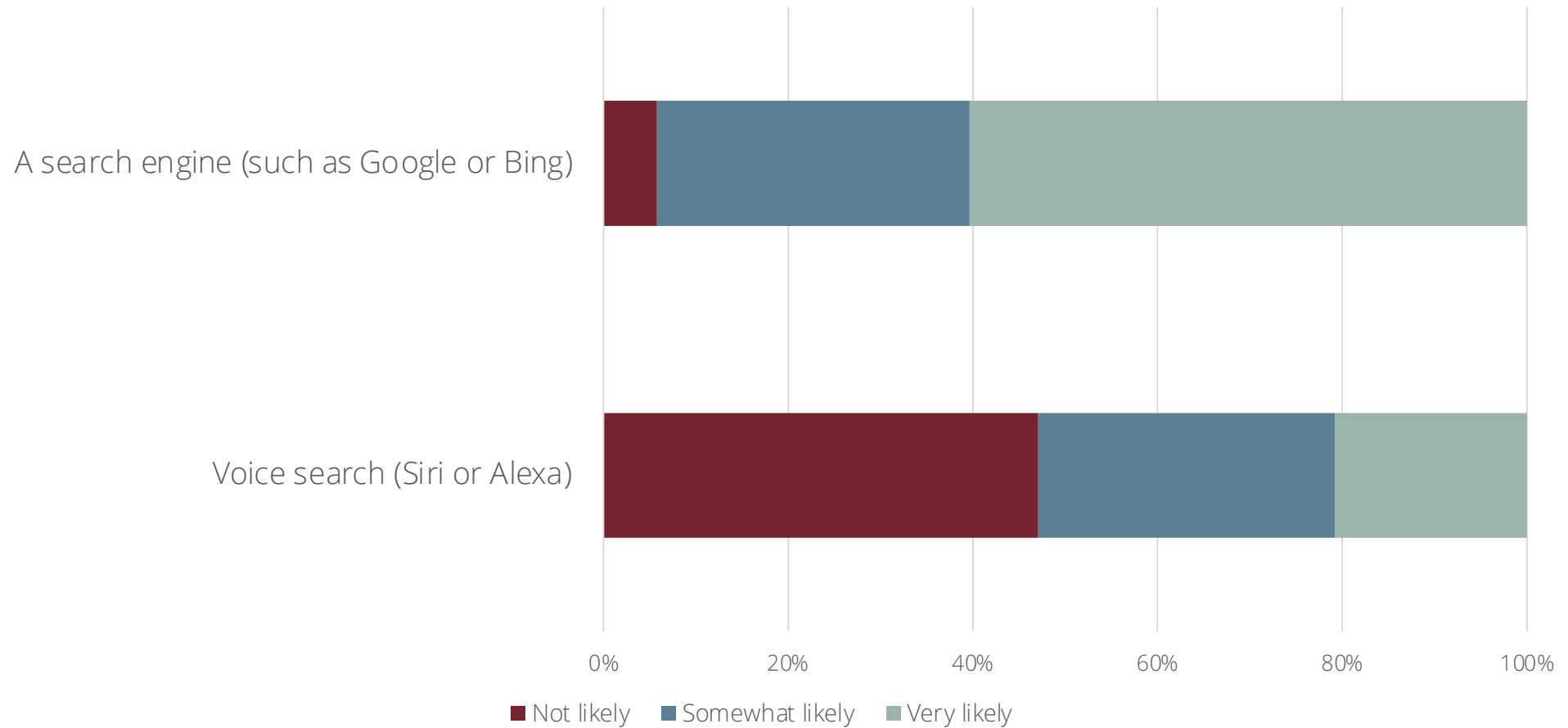
When researching health conditions online, how likely are you to use each of the following?



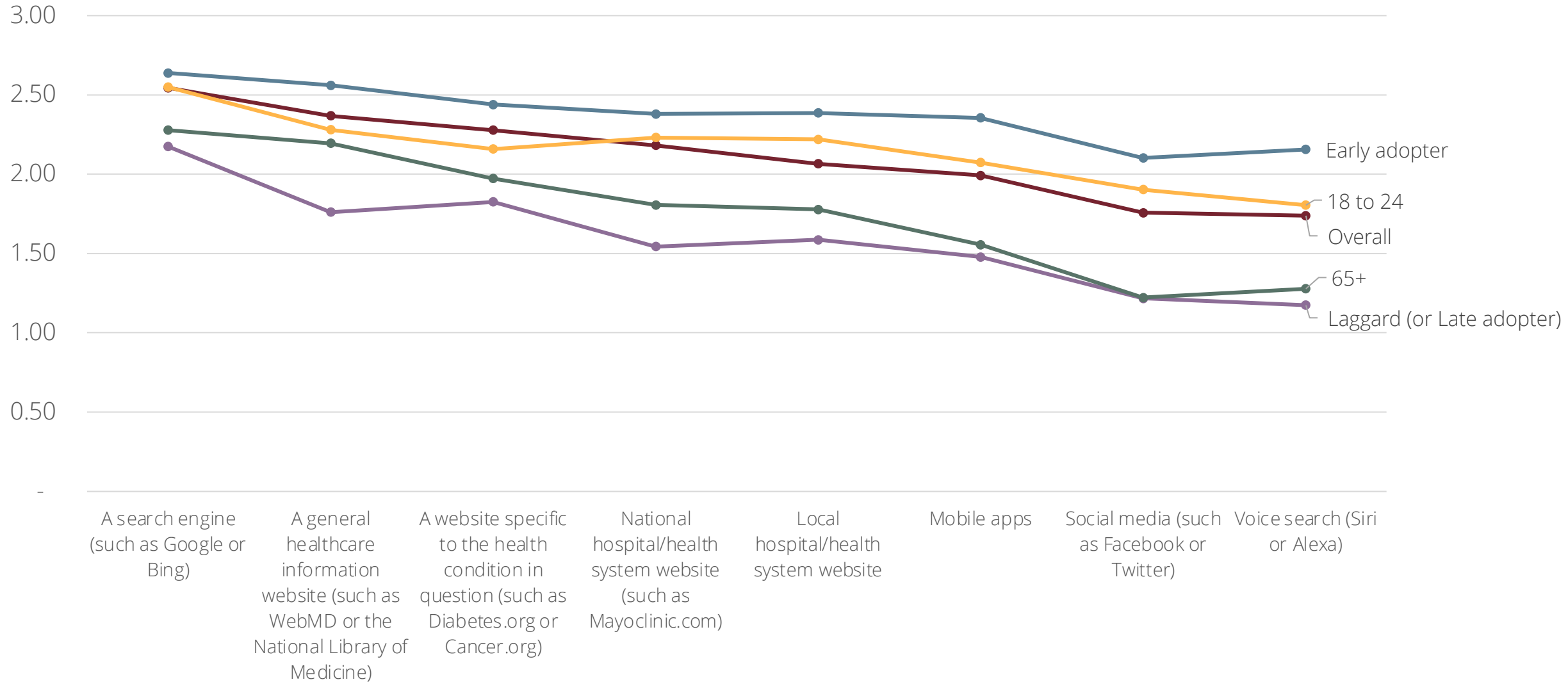
When researching health conditions online, how likely are you to use each of the following?



When researching health conditions online, how likely are you to use each of the following?



When researching health conditions online, how likely are you to use each of the following? (Scored)



What This Means to You...

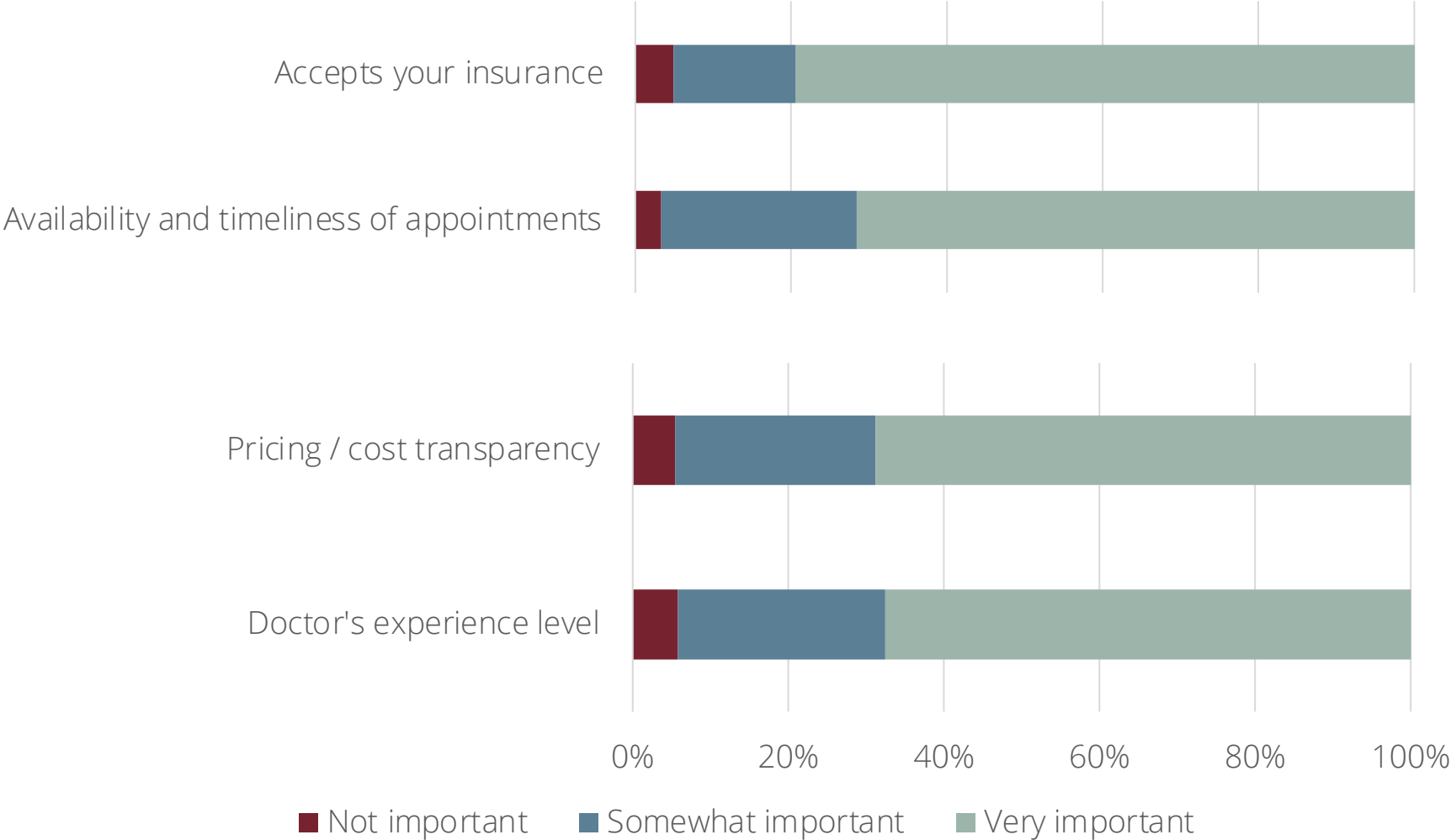
- Consumers start their health research at the search engine
- If not there, then national health library sites or deep content disease sites
- Most health system content strategies around disease and condition information should prioritize SEO use cases

A close-up photograph of a person's hand reaching into a clear glass bowl filled with multi-colored, round candies. The person is wearing a light blue long-sleeved shirt. The background is blurred, showing a desk with a computer monitor and some papers. A semi-transparent dark grey banner is overlaid on the right side of the image, containing the text 'How Do Consumers Pick?'.

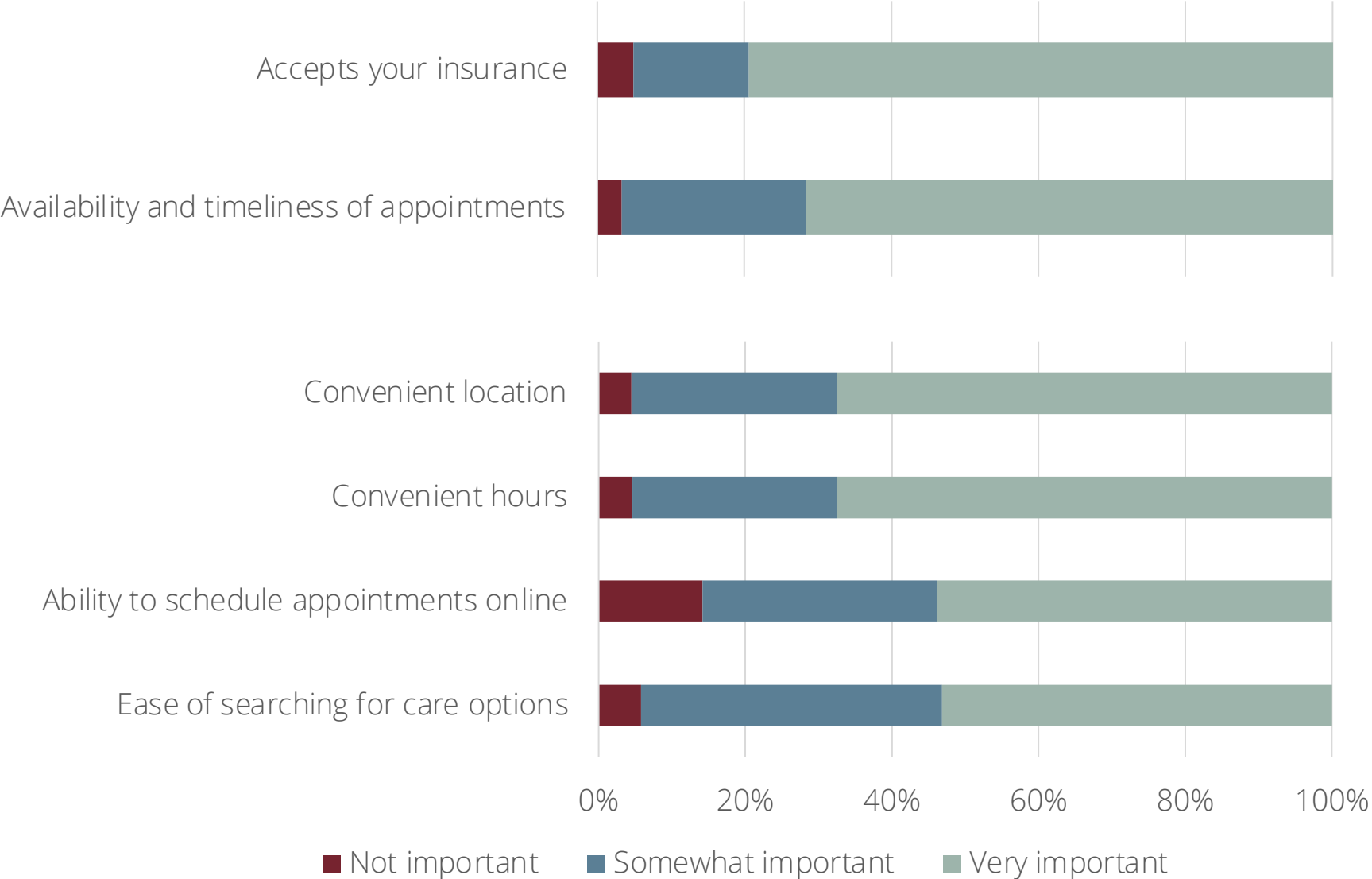
How Do Consumers Pick?



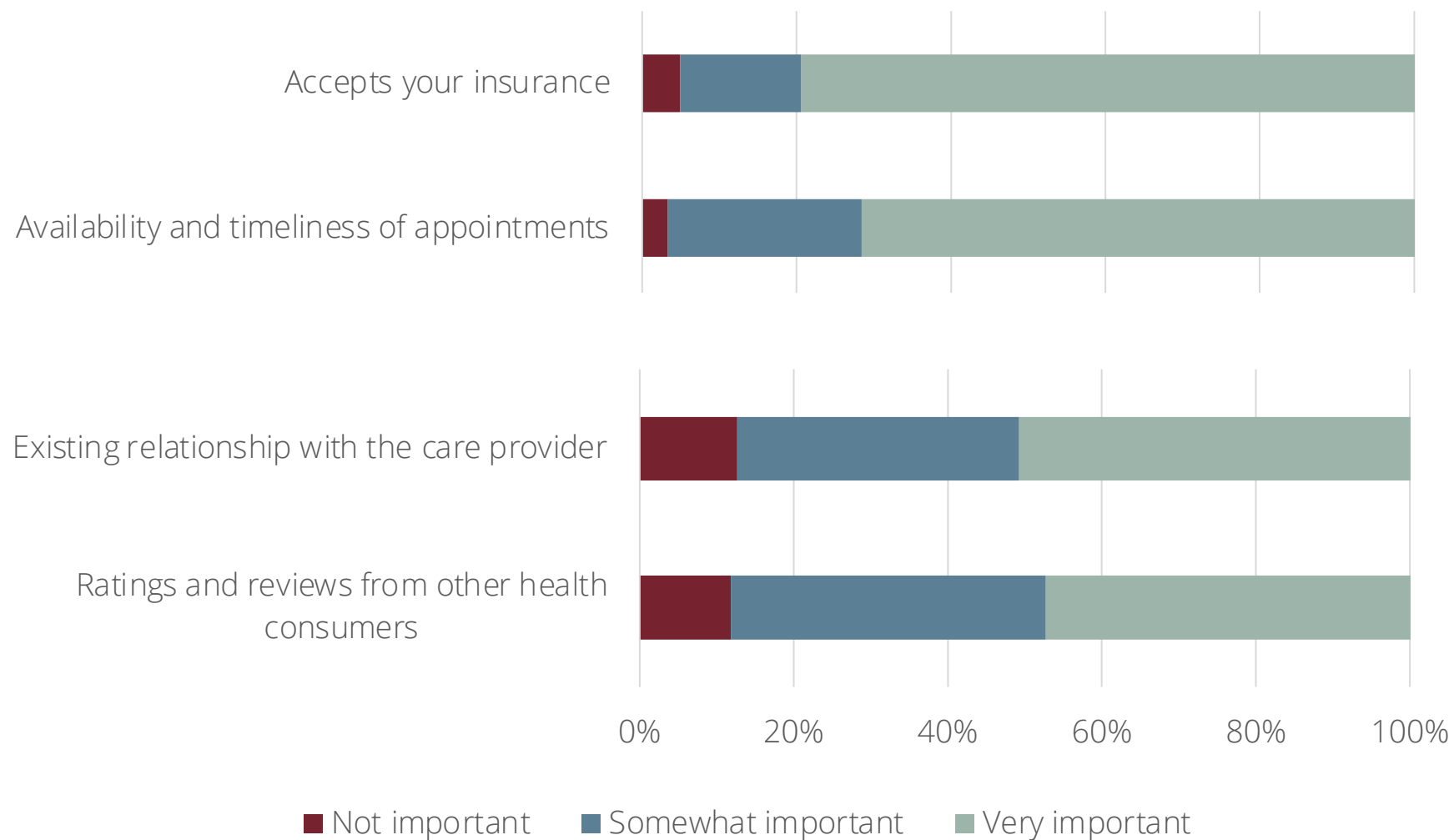
Last time you sought care, how important were each of the following factors in making your decision?



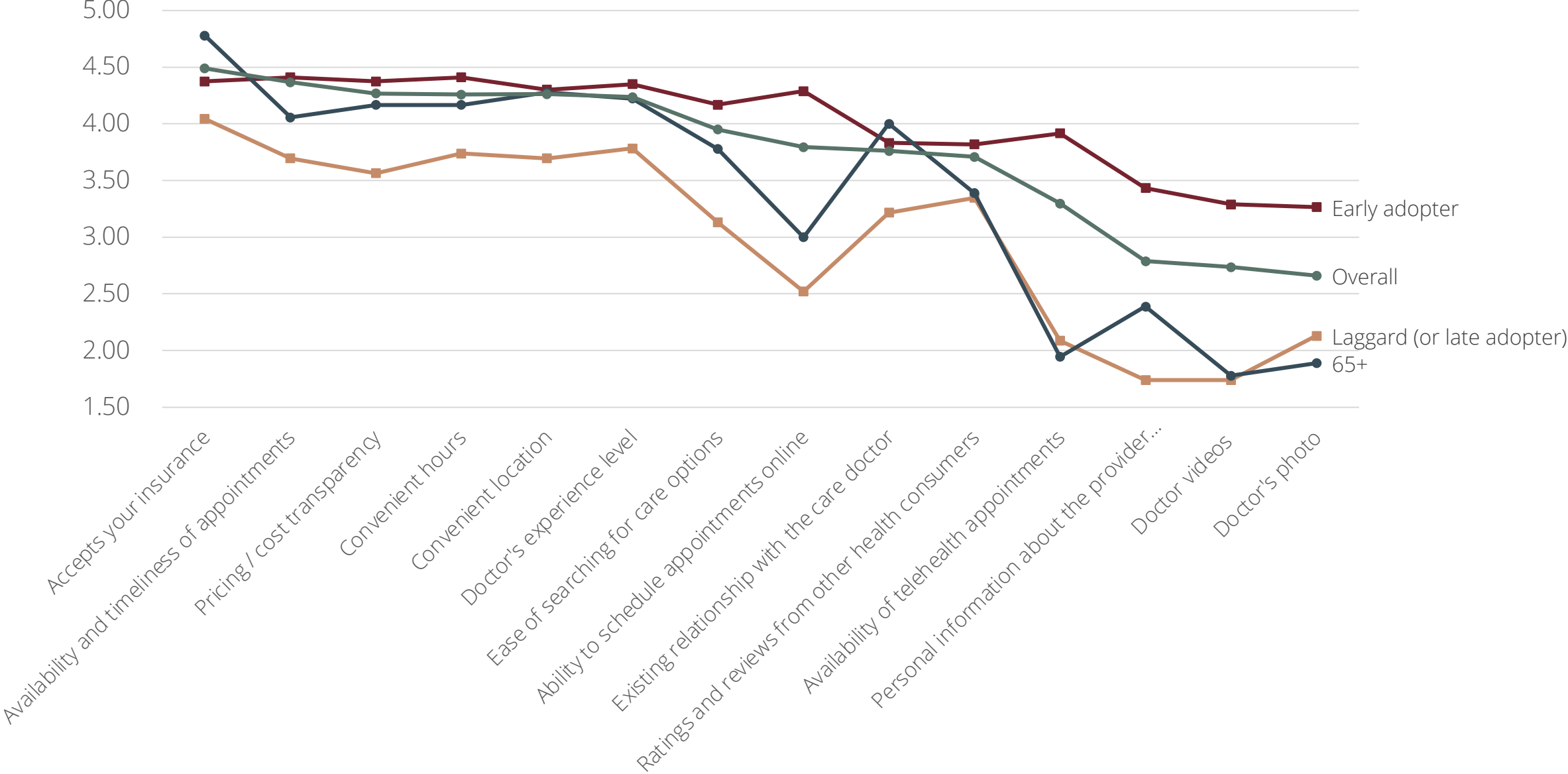
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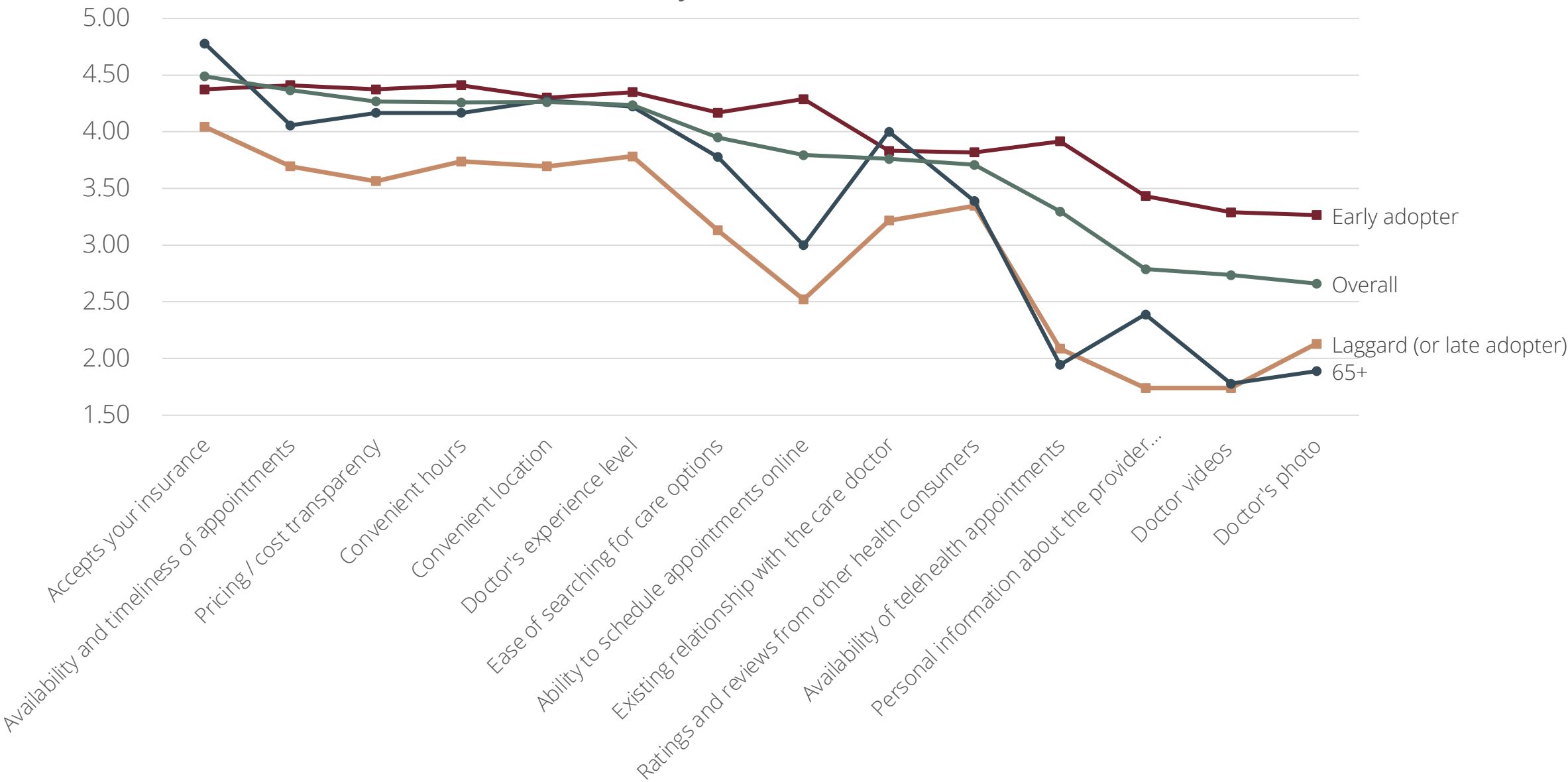
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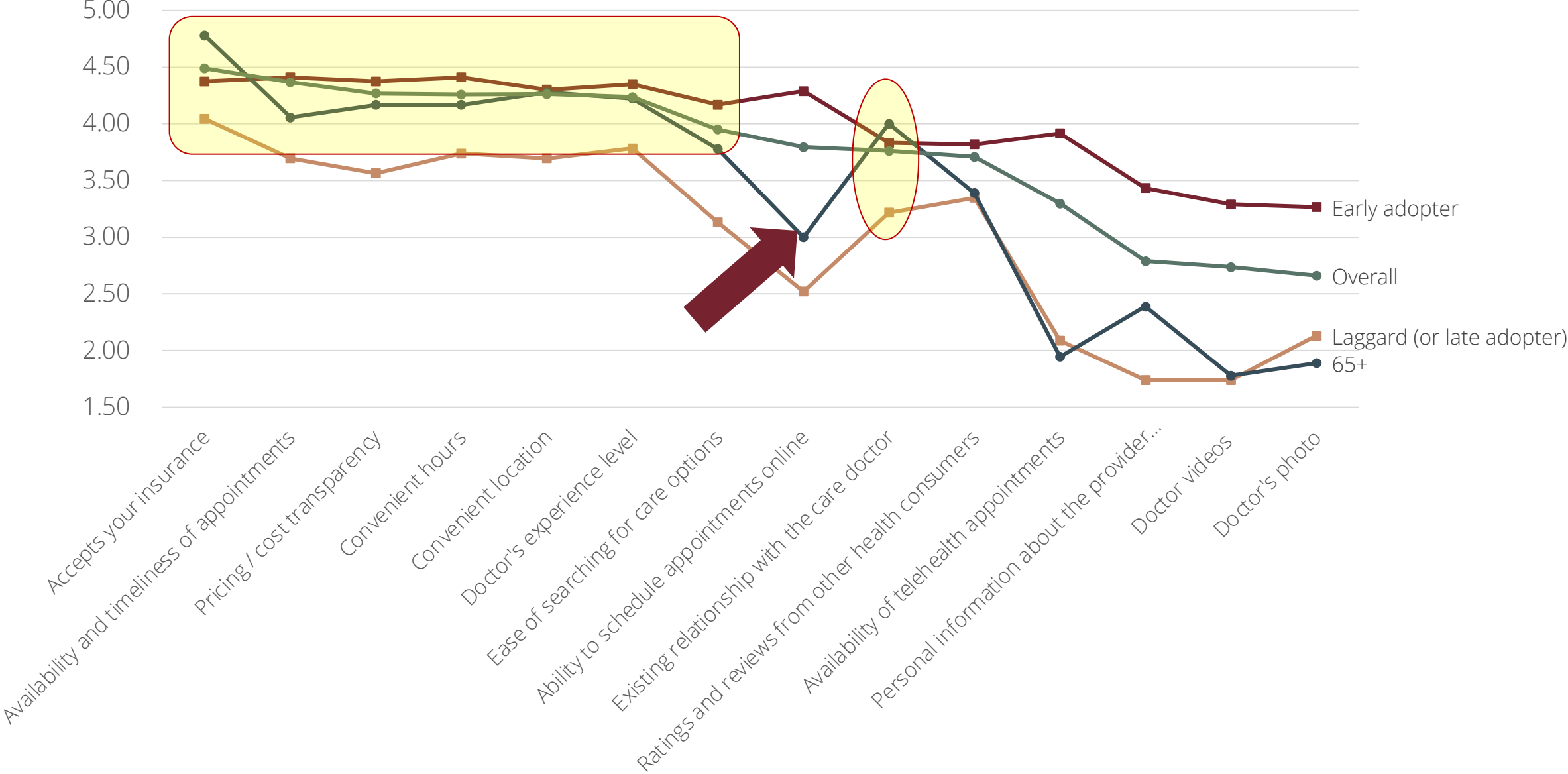
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Last time you sought care, how important were each of the following factors in making your decision?



Last time you sought care, how important were each of the following factors in making your decision?



What This Means to You...

- Make sure that you have the data in your provider profiles that supports consumer choices
- The things towards the bottom are still going to matter
- Work on strategies to compete for consumers and patients for every encounter

Making a Change





43%

of consumers received care
from a new provider or healthcare system
in the past 2 years

Why did they change providers?

Overall, two reasons were most prominent

- Healthcare needs were changing
- A general desire for something better or different



Why did they change providers?

A few other themes clearly emerged

- Lots of people moved or, in a few cases, their provider's office moved.
- Changing insurance or their provider no longer accepted their insurance
- References to price or cost
- A surprising number of consumers had a doctor move away, retire, die, or other leave medical practice
- A desire for greater convenience (including seeking telehealth options)



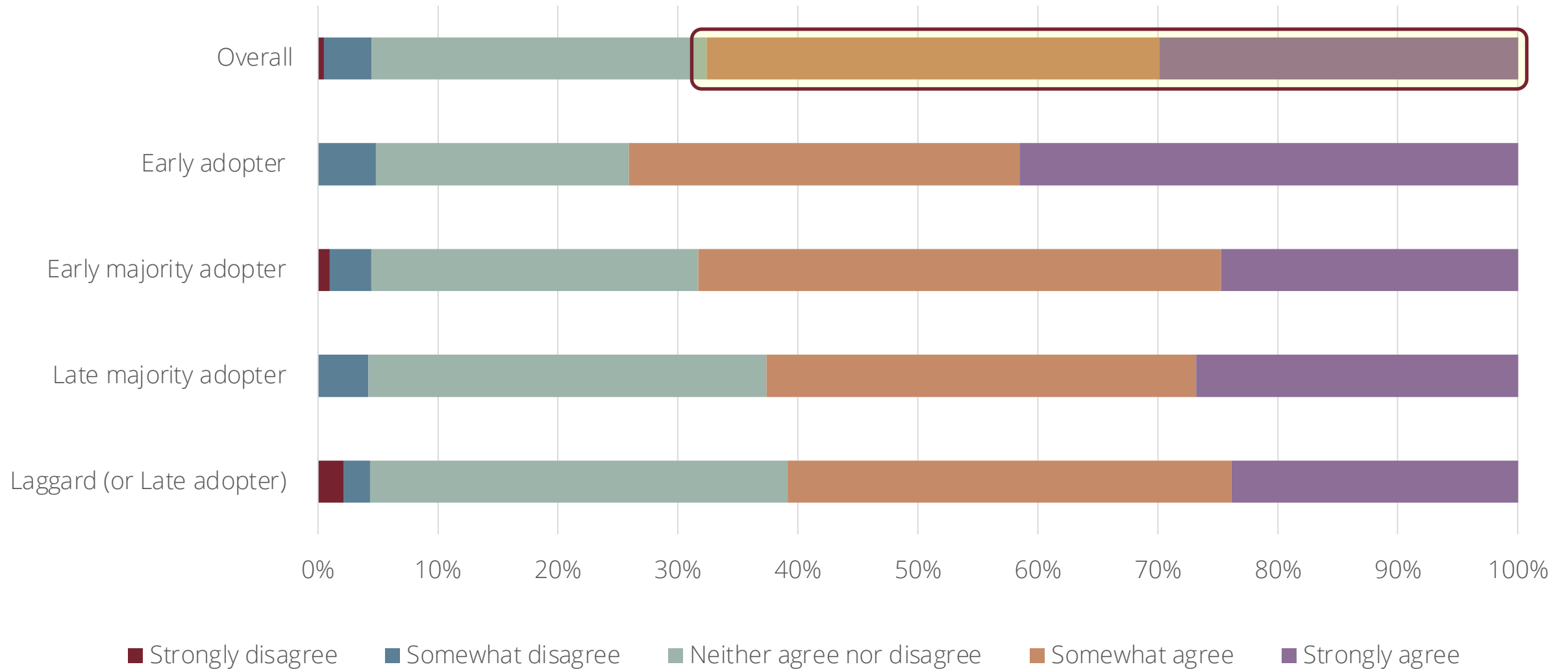
What This Means to You...

- Patient acquisition isn't enough!
- Track and manage your patient satisfaction issues
- Look into connection, nurturing, and engagement with current patients throughout their journey
- While your patient relationships are at risk, there is also an unprecedented opportunity to recruit new patients

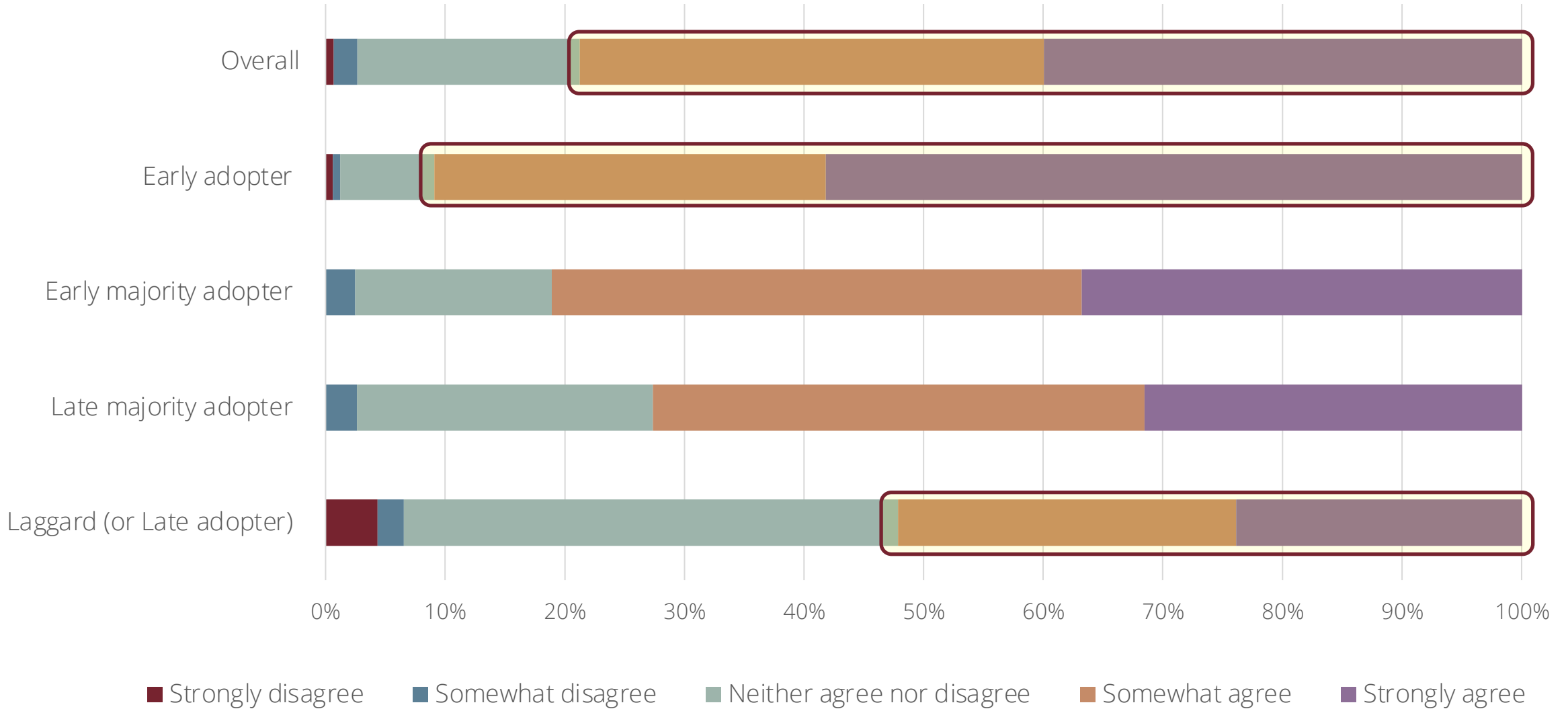
Personalization and Privacy



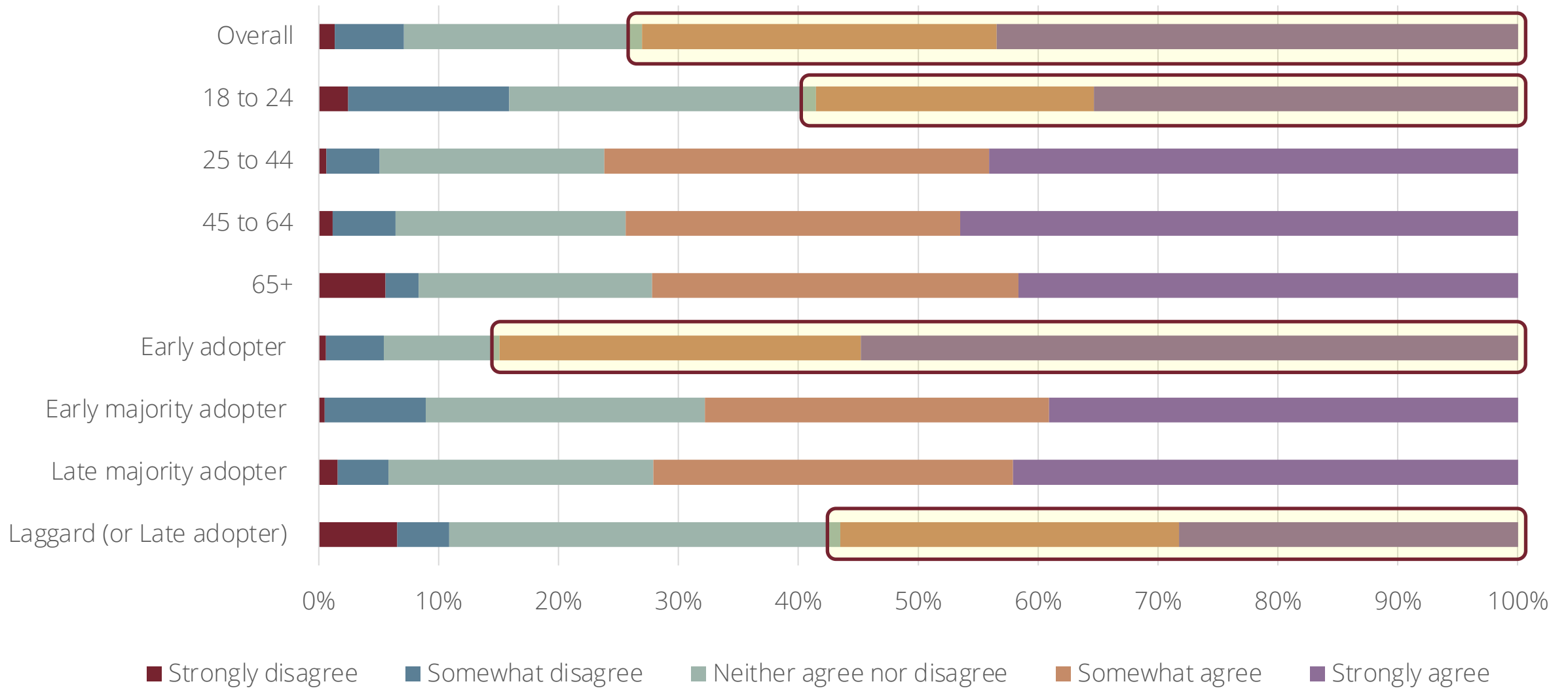
It is frustrating when healthcare websites show or recommend information or actions that aren't relevant to me.



I expect healthcare websites to personalize my experience by understanding my preferences and needs as an individual to deliver more relevant information and services.



I trust healthcare websites to protect the privacy of my information.



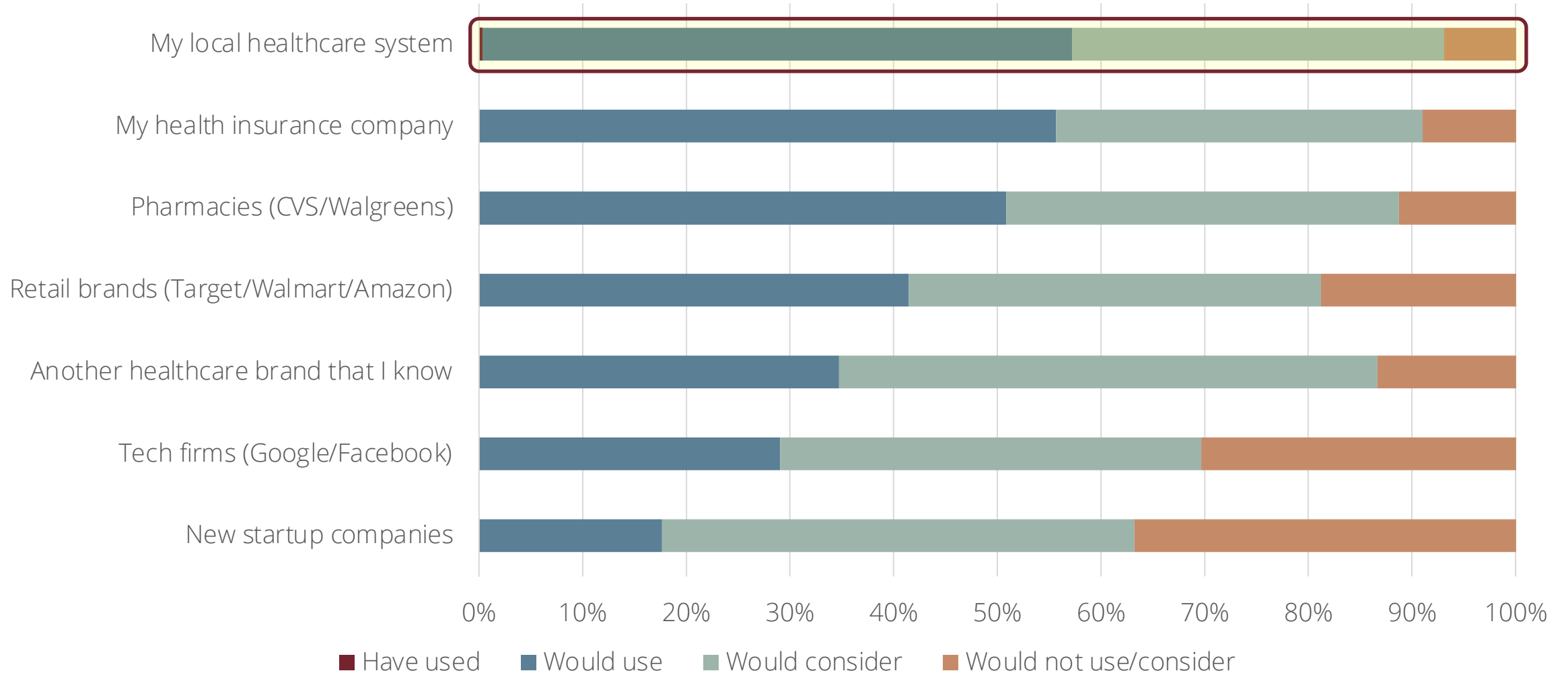
What This Means to You...

- This is a green light to create personalized experiences
 - Consumers want them
 - They're frustrated when they don't have them
 - They trust you to capture the data you need to make them happen

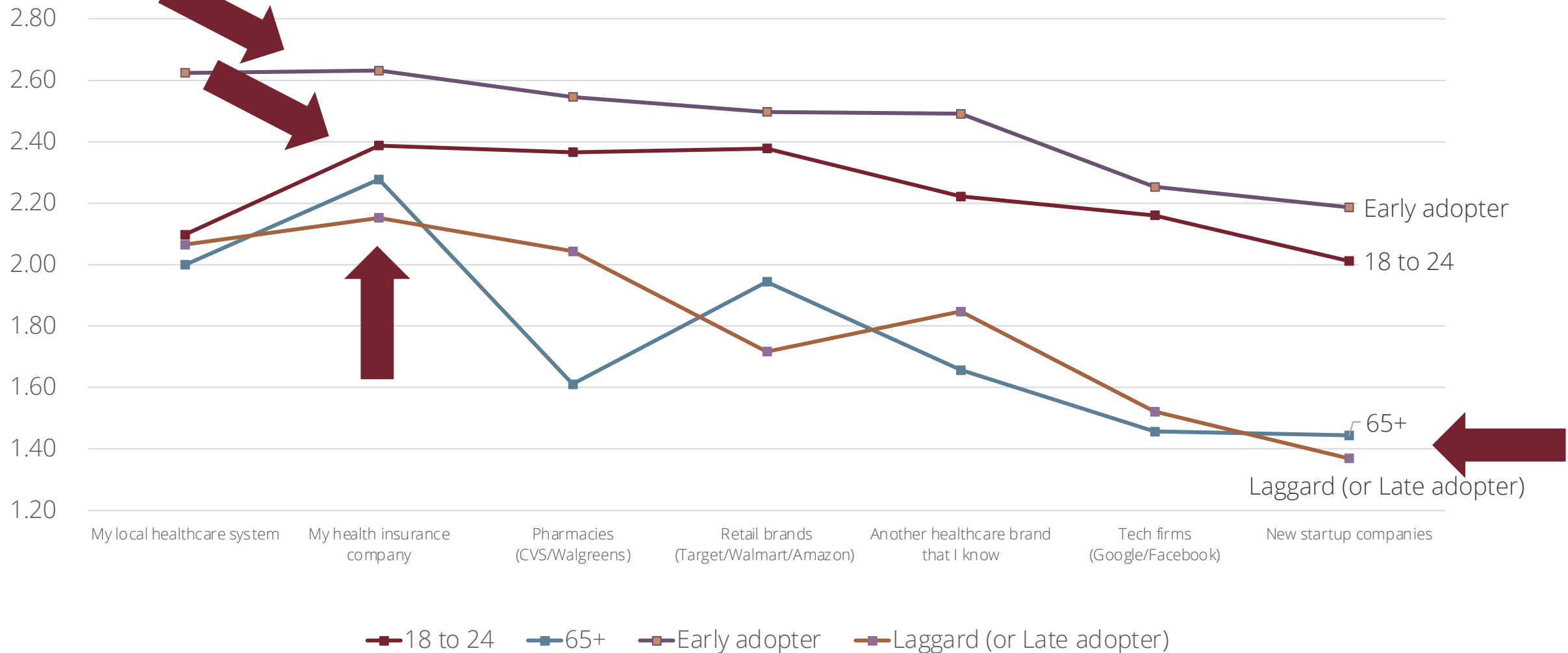
Trusting New Players



Please rate your level of comfort with using each of the following to deliver quality medical care through telehealth (virtual care by phone or computer):



Please rate your level of comfort with using each of the following to deliver quality medical care through telehealth (by tech adoption)



What This Means to You...

- You have a trust advantage over new players TODAY
- That doesn't mean that you're SAFE, only that you have TIME to improve your experience to be more competitive
- You may not feel patient departures...yet
- Make use of the window you have today to invest in digital front door initiatives

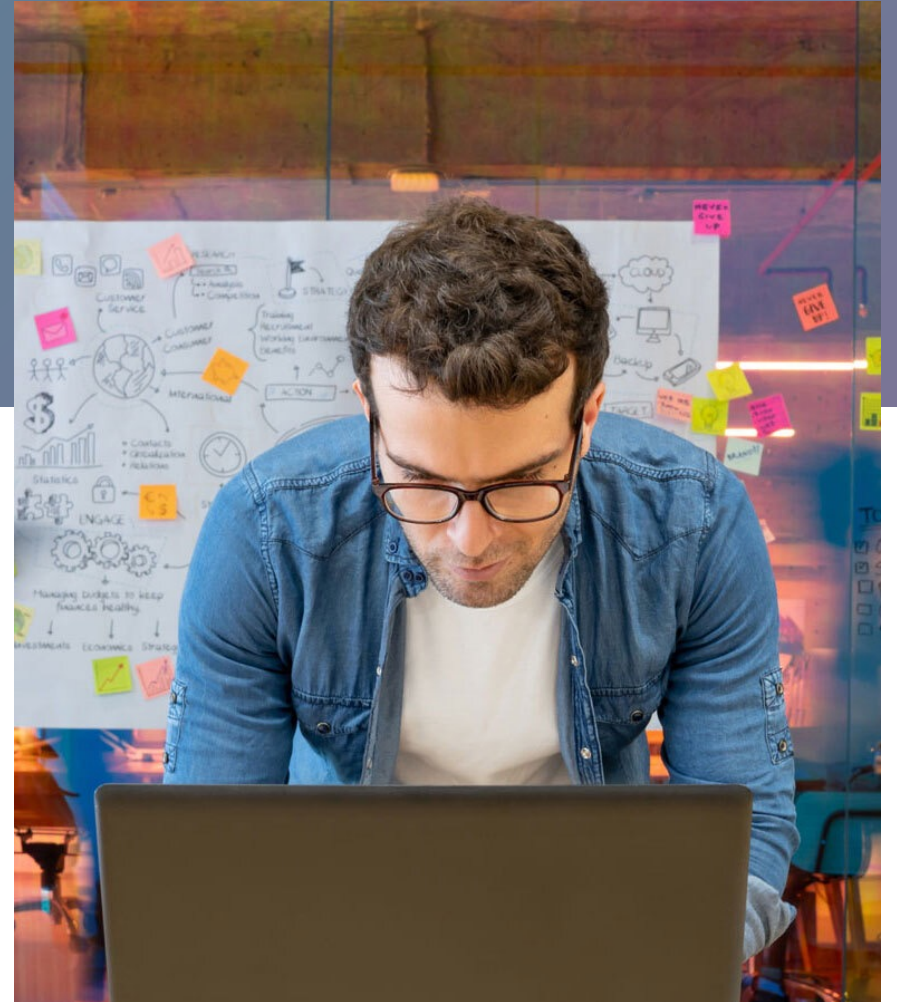
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Wednesday, November 30 @ 1:00 PM CDT

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Q&A with Today's Presenter



Ben Dillon, MBA

Chief Strategy Officer, Geonetric

- Questions for Ben? Enter them in the chat!

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