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Adapt to Evolving Consumer Expectations in Healthcare Marketing

Chris Beland

VP Analyst

Elina Kott

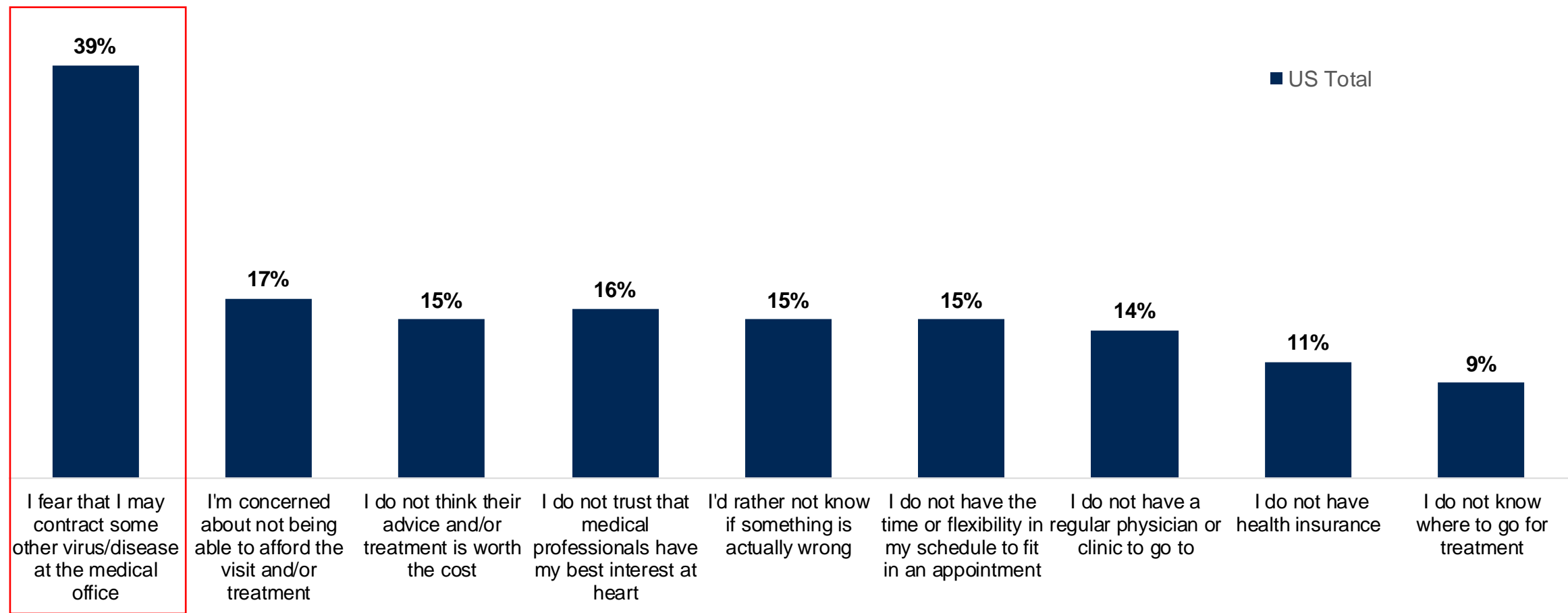Sr Principal Analyst

Tim Barlow

Director Analyst

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The Rise of Healthcare Consumerism

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Why Do Consumers Not Become Patients?

Which of the following reasons have caused you to NOT go to the doctor or a health professional despite having a health-related concern or issue?
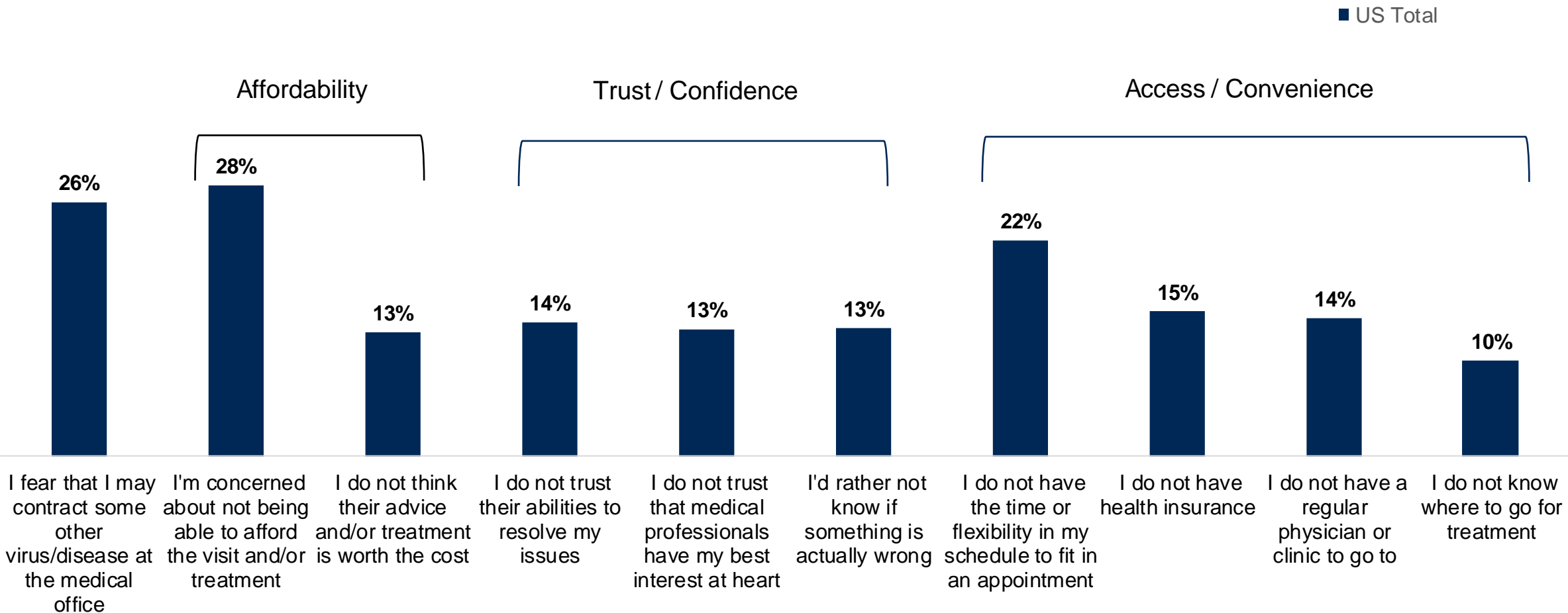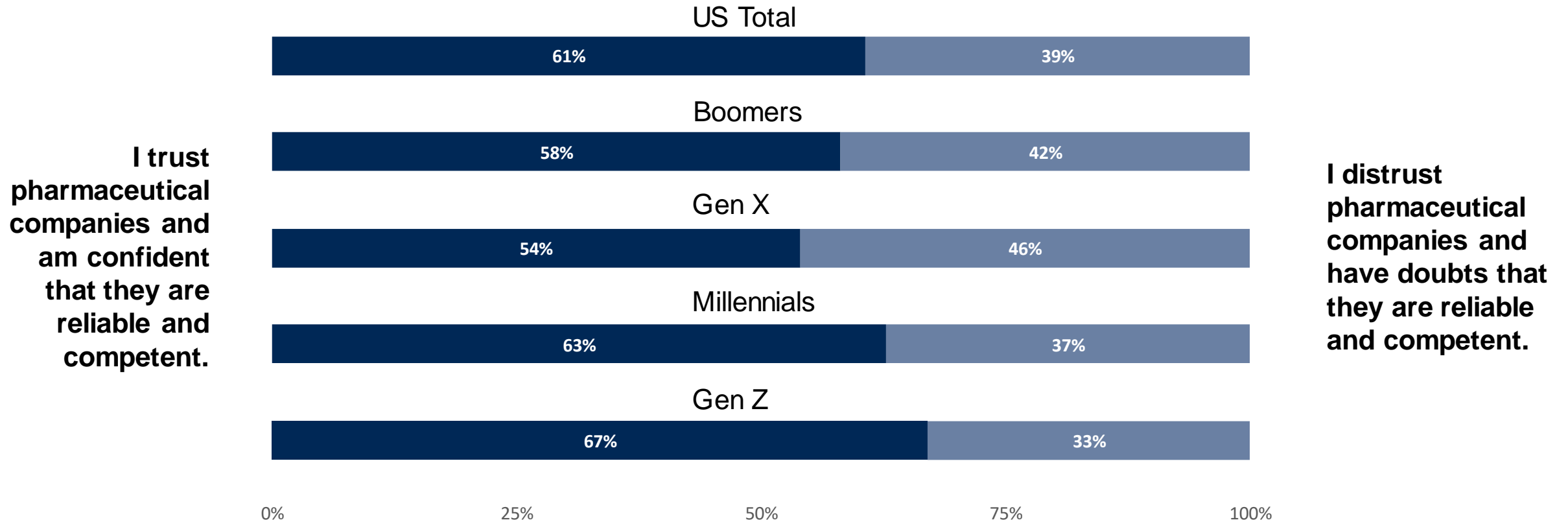
■ US Total

Reason	%
I fear that I may contract some other virus/disease at the medical office	39%
I'm concerned about not being able to afford the visit and/or treatment	17%
I do not think their advice and/or treatment is worth the cost	15%
I do not trust that medical professionals have my best interest at heart	16%
I'd rather not know if something is actually wrong	15%
I do not have the time or flexibility in my schedule to fit in an appointment	15%
I do not have a regular physician or clinic to go to	14%
I do not have health insurance	11%
I do not know where to go for treatment	9%

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Why Do Consumers Not Become Patients?

Which of the following reasons have caused you to NOT go to the doctor or a health professional despite having a health-related concern or issue?

■ US Total

Affordability | Trust / Confidence | Access / Convenience

Reason	%
I fear that I may contract some other virus/disease at the medical office	26%
I'm concerned about not being able to afford the visit and/or treatment	28%
I do not think their advice and/or treatment is worth the cost	13%
I do not trust their abilities to resolve my issues	14%
I do not trust that medical professionals have my best interest at heart	13%
I'd rather not know if something is actually wrong	13%
I do not have the time or flexibility in my schedule to fit in an appointment	22%
I do not have health insurance	15%
I do not have a regular physician or clinic to go to	14%
I do not know where to go for treatment	10%

Source: Gartner Values and Lifestyle Survey, September 2021

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Trust & Confidence

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Younger Respondents Have Greater Trust in Pharmaceutical Companies Than Their Older Counterparts

Percentage of Consumers who Agree with Either Statement, by Generation

I trust pharmaceutical companies and am confident that they are reliable and competent.

I distrust pharmaceutical companies and have doubts that they are reliable and competent.

US Total
| 61% | 39% |

Boomers
| 58% | 42% |

Gen X
| 54% | 46% |

Millennials
| 63% | 37% |

Gen Z
| 67% | 33% |

0%   25%   50%   75%   100%

Source: Gartner Values and Lifestyle Survey, September 2021

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Empowered Consumers are Doing Their Own Health Research

Percentage of consumers who do the following when a health issue arises, Total US Population

Bar chart showing:
- Make an appointment with a doctor or healthcare professional: 68%
- Talk to family or friends: 41%
- Search for treatment information on your own: 38%
- Search for diagnosis information on your own: 38%
- Seek out others with the same symptoms online: 19%
- Research cost of potential treatments: 17%
- Call a pharmacist: 14%
- Call a nurse line: 14%
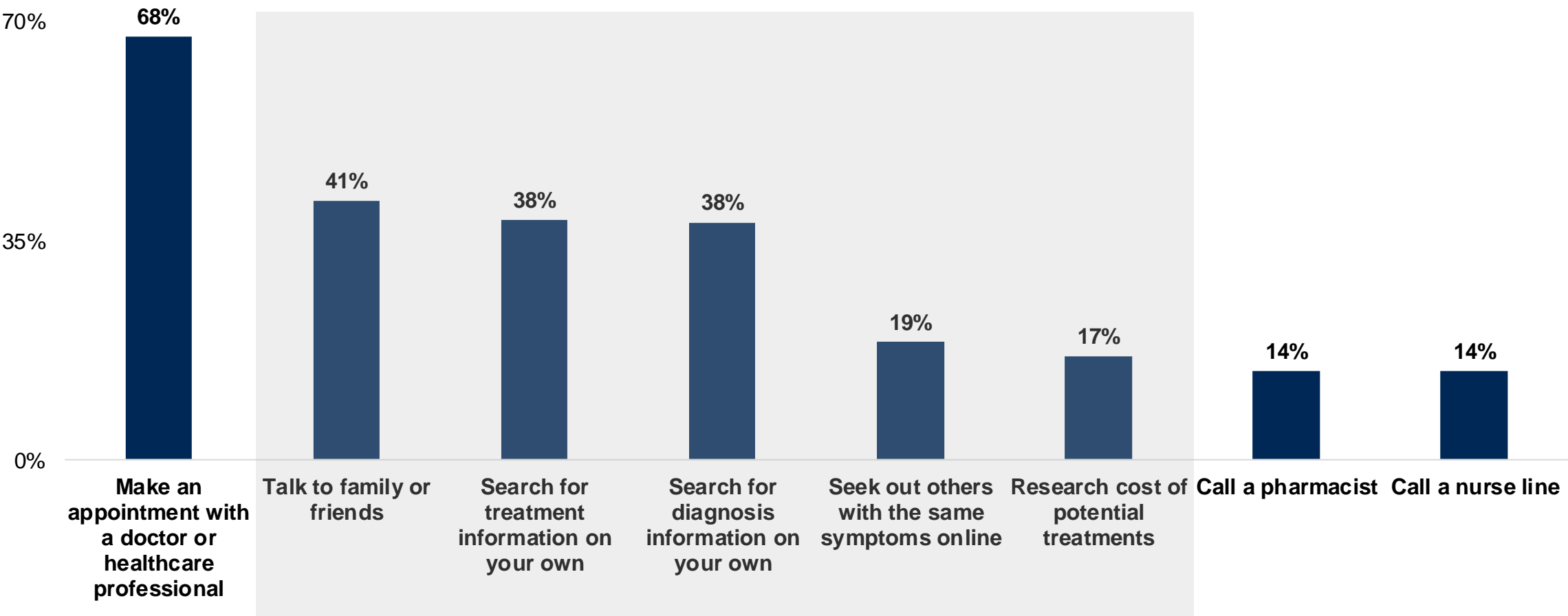
Source: Gartner Values and Lifestyle Survey, September 2021

Gartner

Younger Consumers More Likely to Explore Other Options

Percentage of consumers who do the following when a health issue arises, by Generation

Legend: ■ Gen Z ■ Millenial ■ Gen X ■ Boomers

Category	Gen Z	Millenial	Gen X	Boomers
Make an appointment with a doctor or healthcare professional	48%	62%	70%	82%
Talk to family or friends	50%	44%	42%	35%
Search for treatment information on your own	33%	37%	44%	40%
Search for diagnosis information on your own	31%	39%	41%	39%
Seek out others with the same symptoms online	28%	28%	14%	8%
Research cost of potential treatments	18%	22%	15%	12%
Call a pharmacist	20%	20%	12%	6%
Call a nurse line	19%	18%	13%	8%

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Healthcare CMOs are Prioritizing SEO Efforts
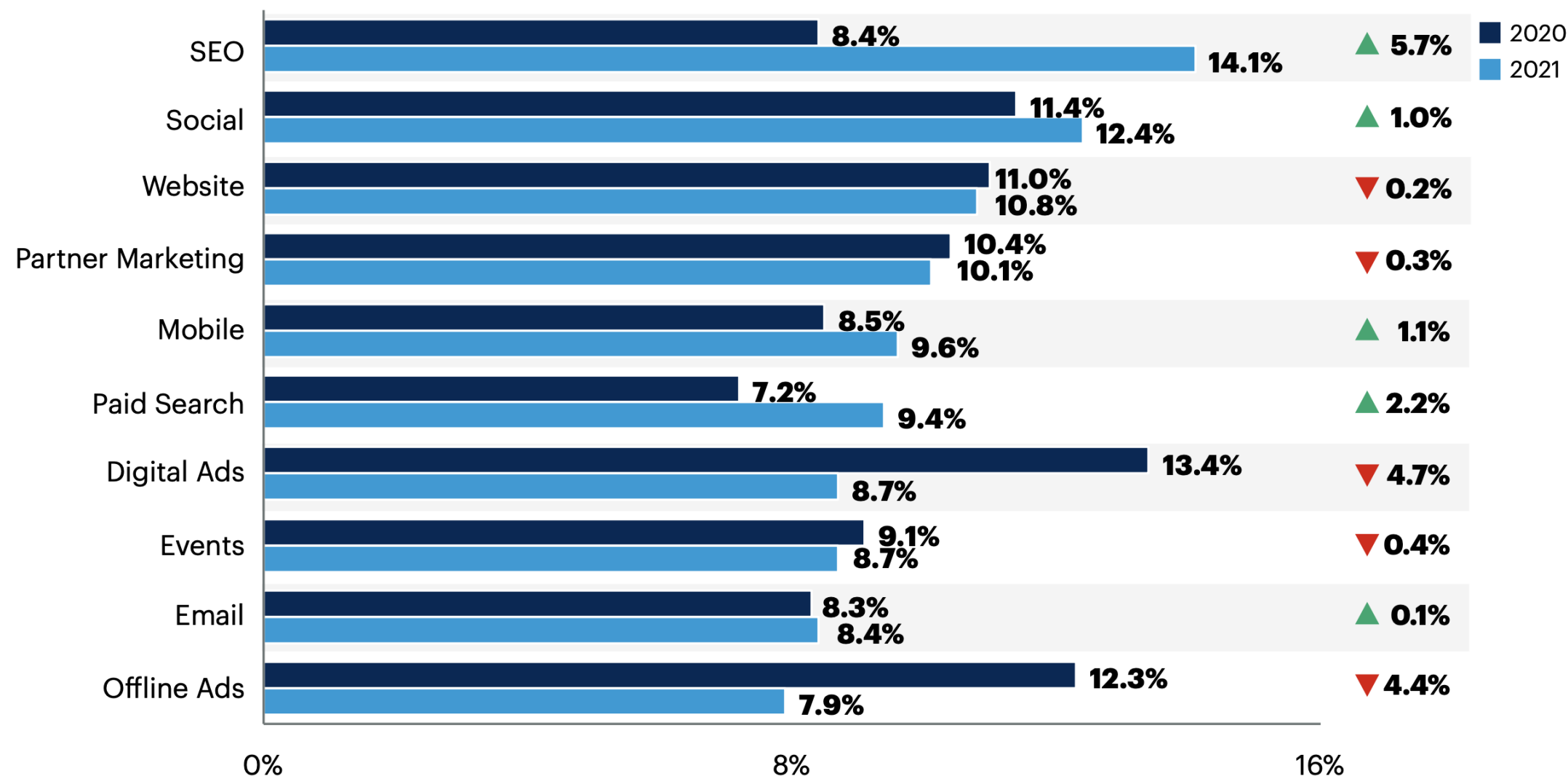
Source: CMO Spend Survey 2021: Marketing Budget Allocation by Channel for Healthcare CMOs

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Hospitals Provide Educational Content as an Extension of their Offerings
H&HS: Adoption of Healthcare Content on Hospital Websites
January 2021

72% of Index Brands with Blogs/Editorial Content
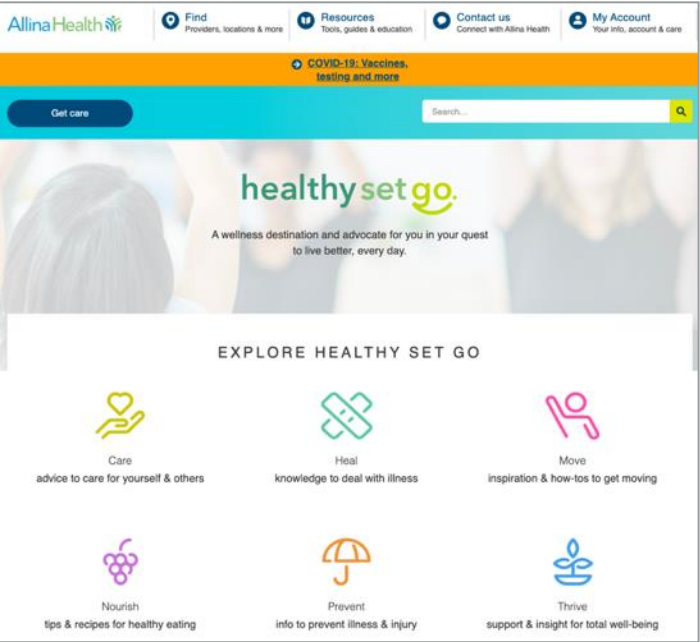
60% of Index Brands with Health Libraries
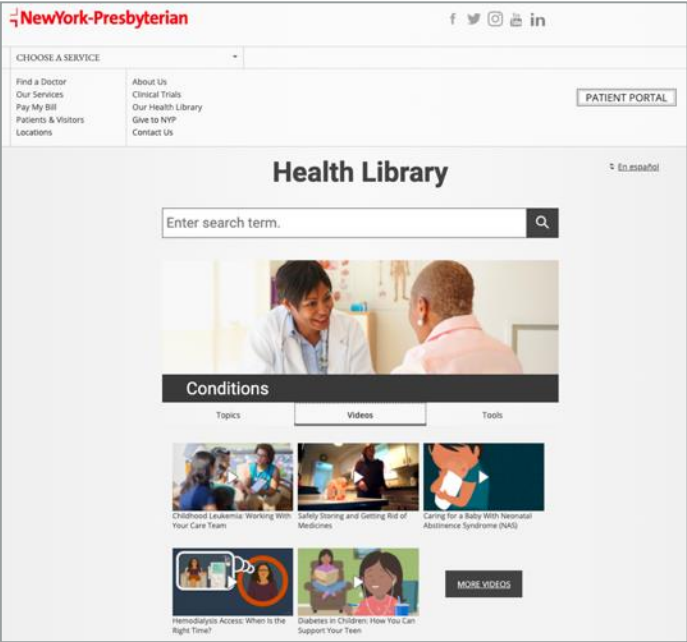
35% of Index Brands with Symptom Checkers
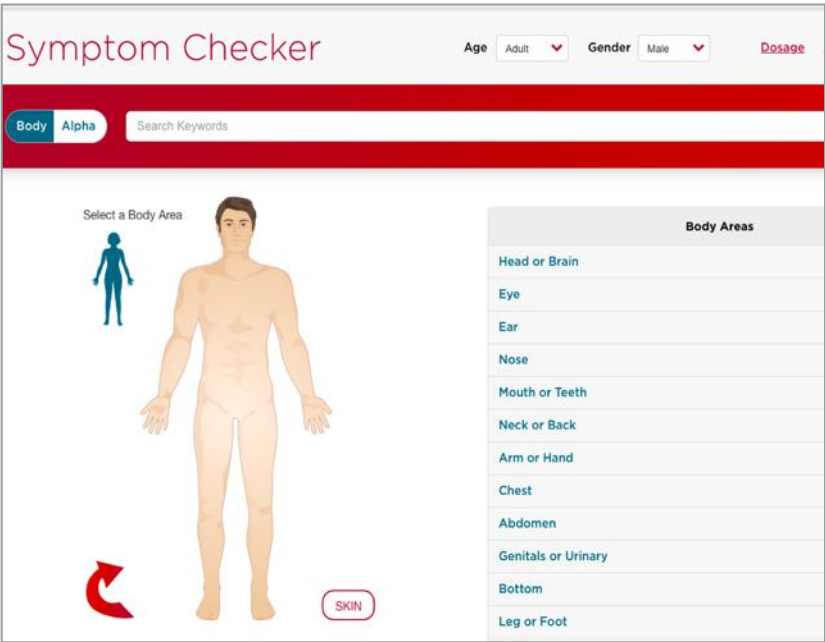
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Health Content Makes Sites More Engaging

Hospital 2021: Site Engagement for Brands with Wellness Content & Health Library

January-December 2020
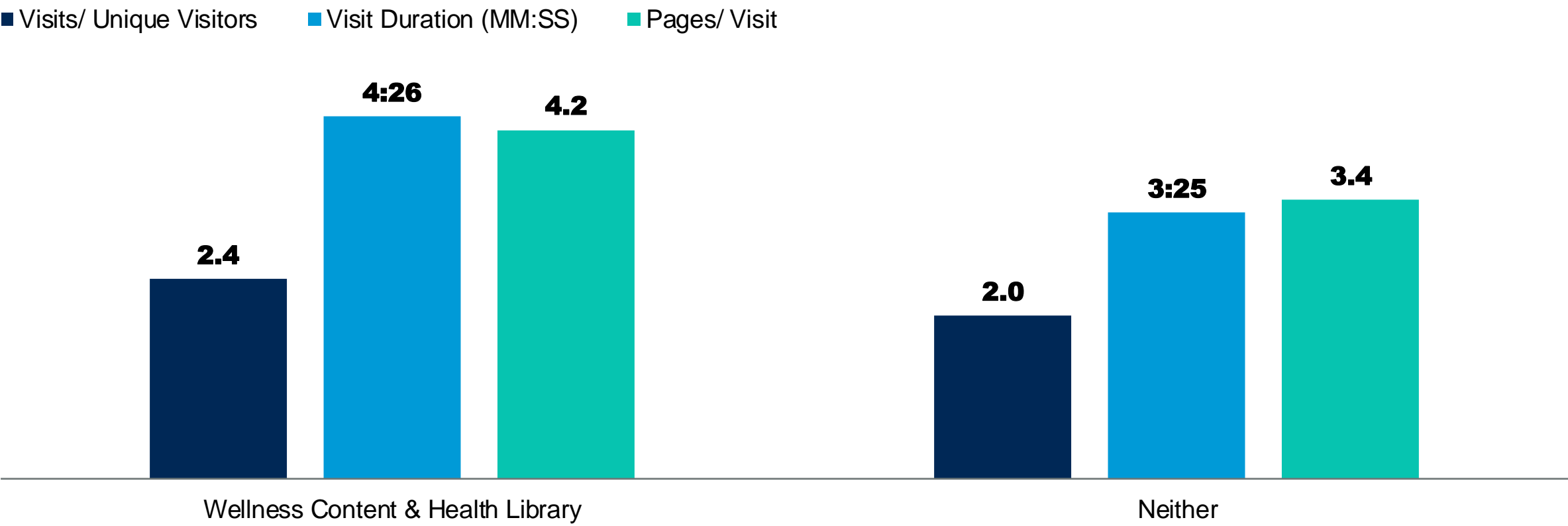
■ Visits/ Unique Visitors ■ Visit Duration (MM:SS) ■ Pages/ Visit

Wellness Content & Health Library
- 2.4
- 4:26
- 4.2

Neither
- 2.0
- 3:25
- 3.4

n = 82 Index Brands

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Consumers are Seeking Out Answers Related to Symptoms and Conditions

Category	Organic Search Visibility			Monthly Search Volume
	Total	**Brands with Health Libraries**	**Brands without Health Libraries**	
Doctor & Hospital Search (dermatologist near me, emergency room, nearest urgent care)	**0.77%**	**0.74%**	**0.86%**	**205,769**
Financial Assistance (affordable doctors, ER visit cost, help with medical bills)	**0.16%**	**0.21%**	**0.08%**	**1,950**
Medical Services (CT scan, mammogram near me, coronavirus test)	**0.57%**	**0.90%**	**0.10%**	**88,625**
Symptoms & Conditions (covid symptoms, concussion, strep throat)	**0.38%**	**0.57%**	**0.10%**	**1,074,738**
Telehealth (chat with a doctor, how does telehealth work, telemedicine)	**0.26%**	**0.21%**	**0.31%**	**4,321**

Brands Should Monitor Search Trends

Google: Top Keywords by % Change in Search Volume
Dec 2018 – Nov 2019 vs. Dec 2019 – Nov 2020, n = 89 Symptoms and Conditions Keywords

Keyword	% Change
muscle strain	64%
poison oak	61%
sore throat	48%
poison ivy	42%
acid reflux	31%
canker sore	31%
flu symptoms	28%
uti symptoms	25%
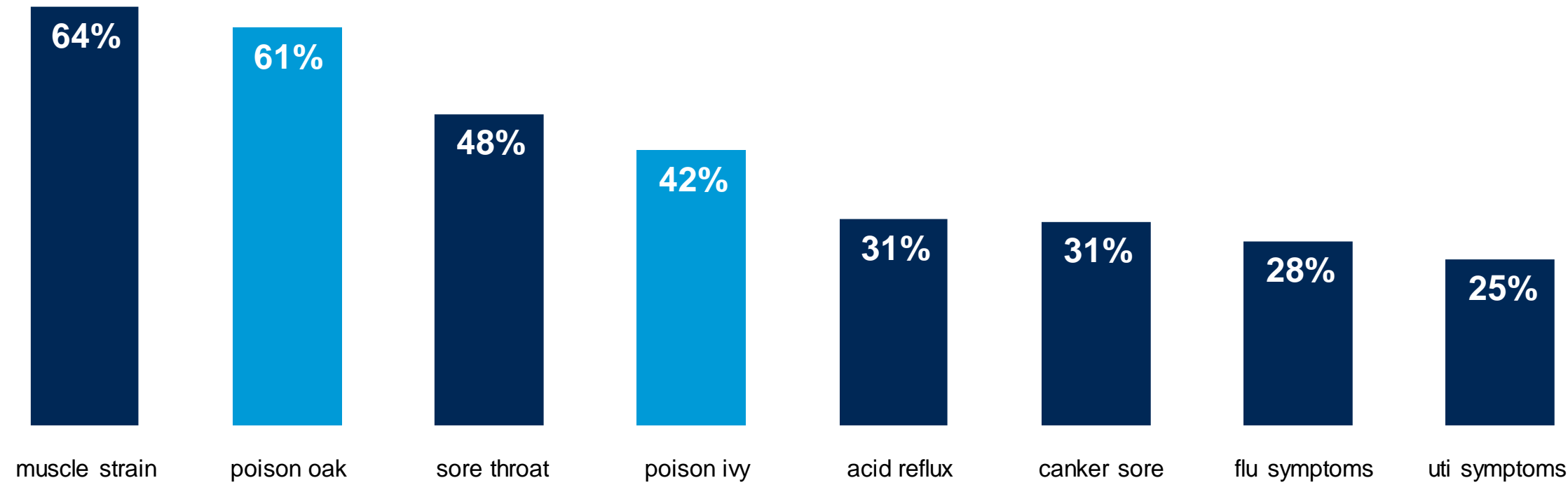
Source: Gartner analysis of Google Keyword Planner data.

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...And Update With Robust Content Accordingly

Mayo Clinic

✓ Plant and symptom imagery

"poison ivy" appears 32X

"oak" and "sumac" appear 6+

Links to related articles

Last reviewed Oct 2020

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Brands Miss the Opportunity to Facilitate Follow-Ups

H&HS: Share of Brands with Health Libraries That Lead to Conversion
March 2021

60% — Brands with Health Libraries

29% — Health Libraries with CTA to Book Appointment or Find a Doctor

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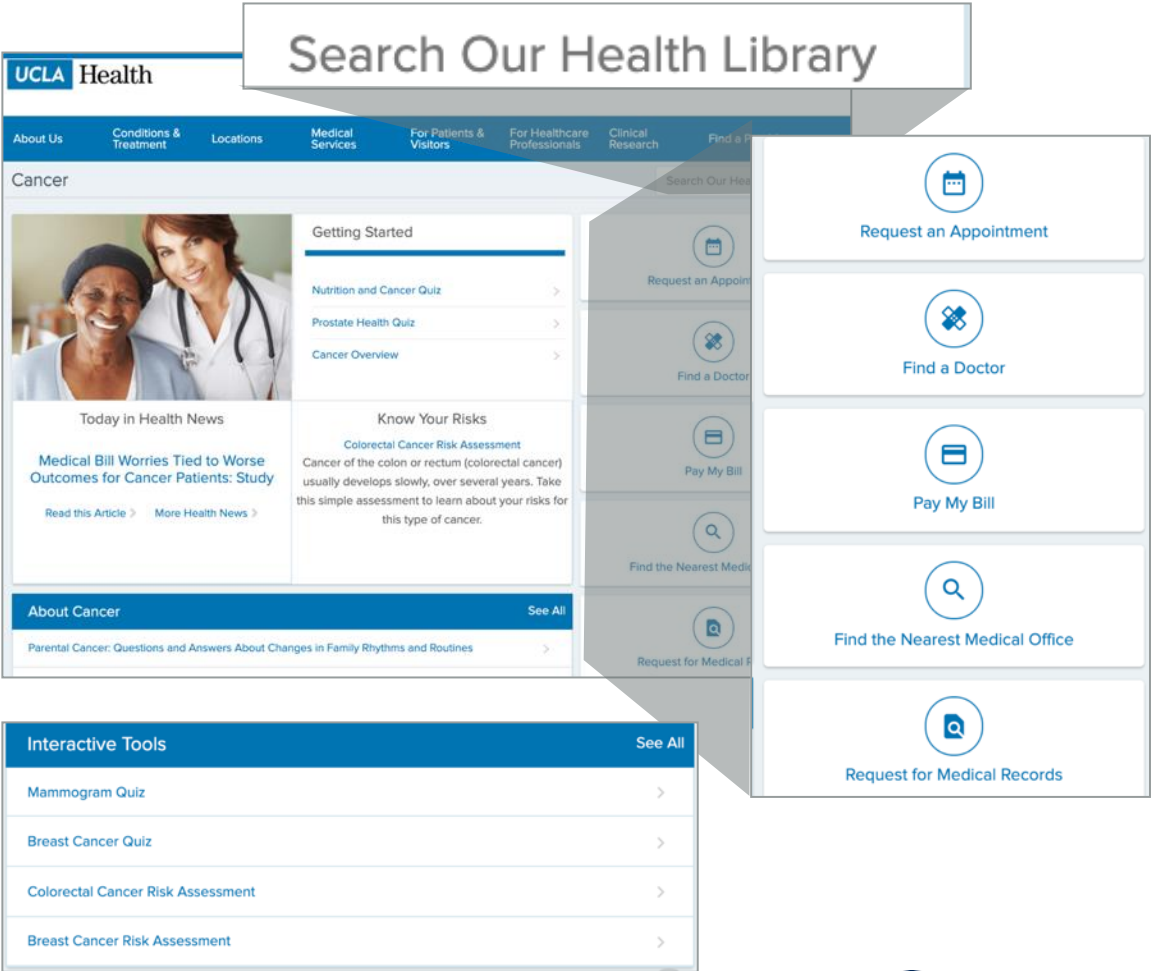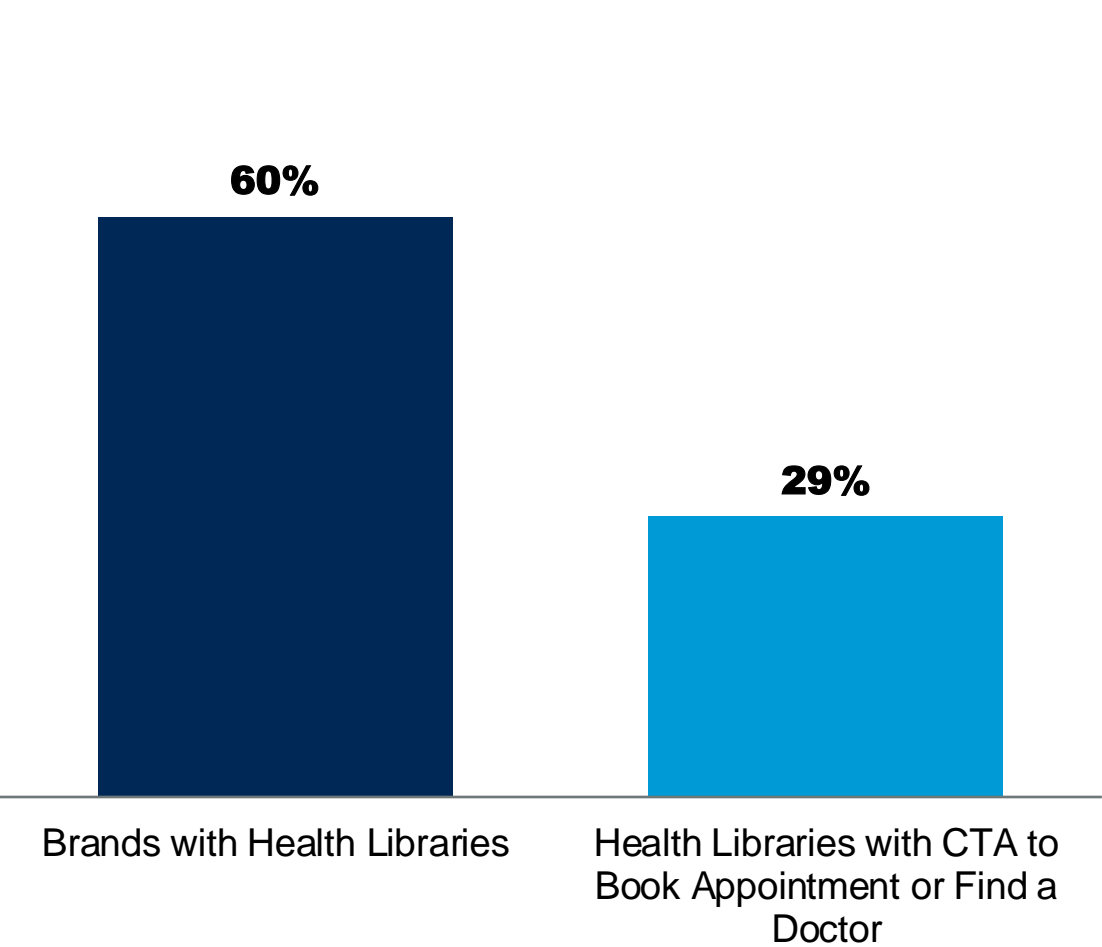
H&HS Offer Symptom Checkers to Intercept Information-Seeking Patients

Symptoms Checklist

Recommendations

Based on what symptoms users check, Cedars Sinai's Symptom Checker Tool recommends the appropriate care option, with each leading to the next best action.

In Pharma, Quizzes & Trackers Help Educate and Facilitate Discussion

Test Your Knowledge & Educate

Symptom Trackers to Facilitate Discussion with Doctor

Facilitate Self-Diagnosis & Highlight Severity of Disease

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Consumers are Increasingly Comparing Brands

Percentage Increase in Brand Comparison Searches
Jan 2020 to April 2021

Brand Comparison Search Queries	% Increase
Anoro vs. Trelegy	600%
Dovato vs Biktarvy	240%
Trulicity vs Ozempic	108%
Cosentyx vs Taltz	50%
Repatha vs Praluent	48%
Xarelto vs. Eliquis	24%
Basaglar vs. Lantus	24%
Aimovig vs Emgality	23%
Trulicity vs Bydureon	23%
Toujeo vs. Tresiba	22%
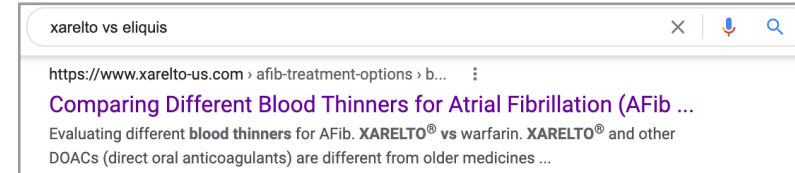
	DOAC (direct oral anticoagulant)	No routine blood monitoring	Once-daily dosing	No known food restrictions	Begins working quickly	Has a reversal agent
XARELTO® (rivaroxaban)	✓	✓	✓	✓	✓	✓
Warfarin (Coumadin®, Jantoven®)	–	–	–	–	–	–
Eliquis® (apixaban)	✓	✓	–	✓	✓	✓
Pradaxa® (dabigatran)	✓	✓	–	✓	✓	✓
Savaysa® (edoxaban)	✓	✓	✓	✓	✓	–
Aspirin	–	✓	✓	✓	✓	–

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Comparison Tools Allow Patients to Find the Best Fit

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Hospitals & Health Systems are Elevating Doctor Profiles to Establish Credibility

Index Adoption of Doctor Profile Features

January 2021

Feature	Adoption
Ratings & Reviews	46%
Videos of Doctors	32%
Articles/Research Publications	27%
Ability to Compare Doctors	4%
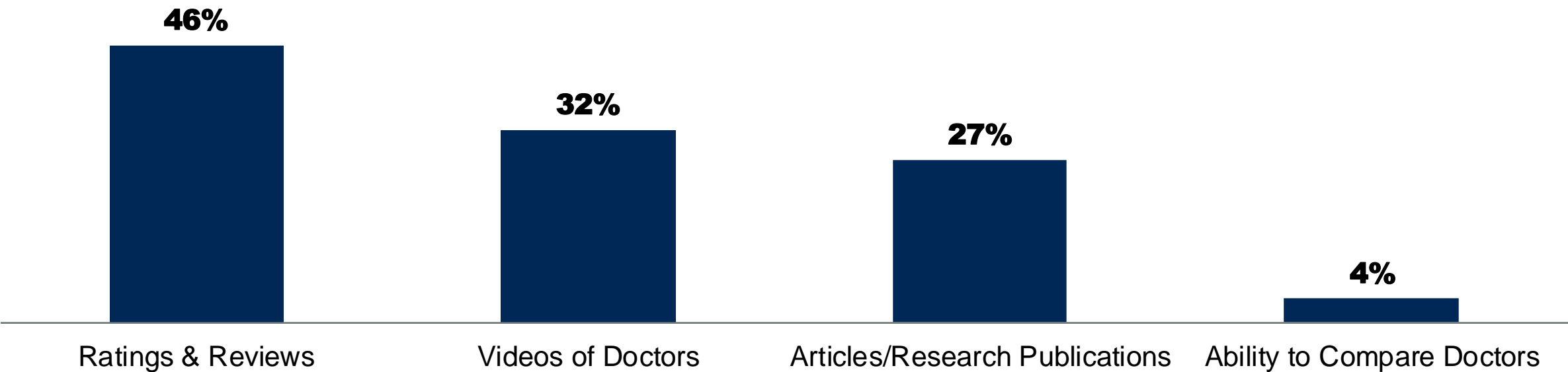
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Access & Convenience

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Fear of COVID Leads, but Longstanding Concerns Also Keep Consumers From Seeking Medical Care

Which of the following reasons have caused you to NOT go to the doctor or a health professional despite having a health-related concern or issue?

Access / Convenience

■ US Total

Reason	%
I fear that I may contract some other virus/disease at the medical office	26%
I'm concerned about not being able to afford the visit and/or treatment	28%
I do not think their advice and/or treatment is worth the cost	13%
I do not trust their abilities to resolve my issues	14%
I do not trust that medical professionals have my best interest at heart	13%
I'd rather not know if something is actually wrong	13%
I do not have the time or flexibility in my schedule to fit in an appointment	22%
I do not have health insurance	15%
I do not have a regular physician or clinic to go to	14%
I do not know where to go for treatment	10%

Source: Gartner Values and Lifestyle Survey, September 2021

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Consumers Most Frequently Make an Appointment with a Doctor When a Health Issues Arises, Talking to Family/Friends and Independent Research Other Popular Actions

Percentage of consumers who do the following when a health issue arises, Total US Population

Action	Percentage
Make an appointment with a doctor or healthcare professional	68%
Talk to family or friends	41%
Search for treatment information on your own	38%
Search for diagnosis information on your own	38%
Seek out others with the same symptoms online	19%
Research cost of potential treatments	17%
Call a pharmacist	14%
Call a nurse line	14%
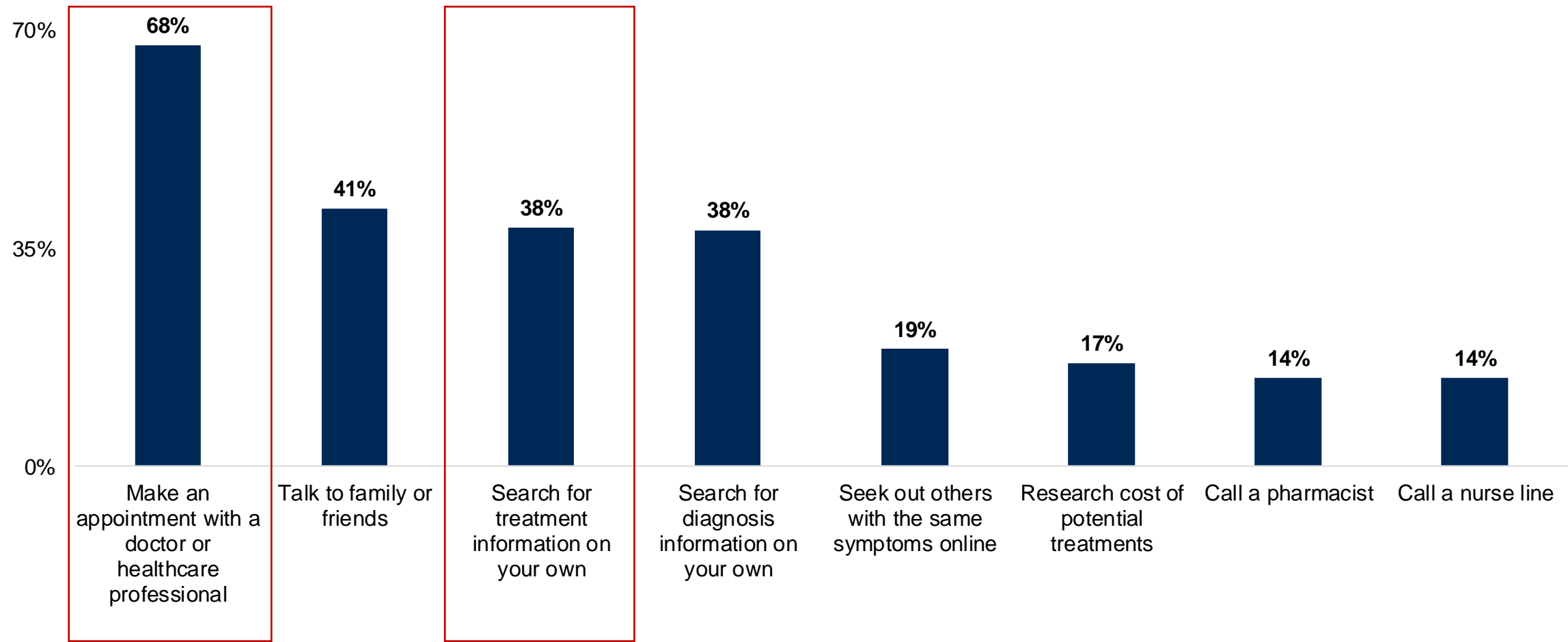
Source: Gartner Values and Lifestyle Survey, September 2021

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Make It Easy

Getting Started and Finding a Doctor

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Wait Times to Empower Patients with Information

Consumers are Increasingly Finding Their Own Specialist

Pharma Rx 2021: YoY Change in Search Volumes by Therapeutic Area
May 2021

"Specialist Near Me" Keyword Searches	Jan 2021 Volumes	% Growth from Jan 2020
Pulmonologist	40.5K	82.4%
Gastroenterologist	90.5K	49.6%
Cardiologist	60.5K	49.4%
Infectious Disease Specialist	1.6K	23.1%
Endocrinologist	90.5K	22.3%
Dermatologist	550K	22.2%
Psychiatrist	201K	21.8%
Neurologist	110K	21.5%
PCP	2.9K	0.0%
Allergist	40.5K	0.0%

Source: Gartner Analysis of SEMrush Data

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Pharma Brands Meet Demand with Homegrown and Off-the-Shelf Locators
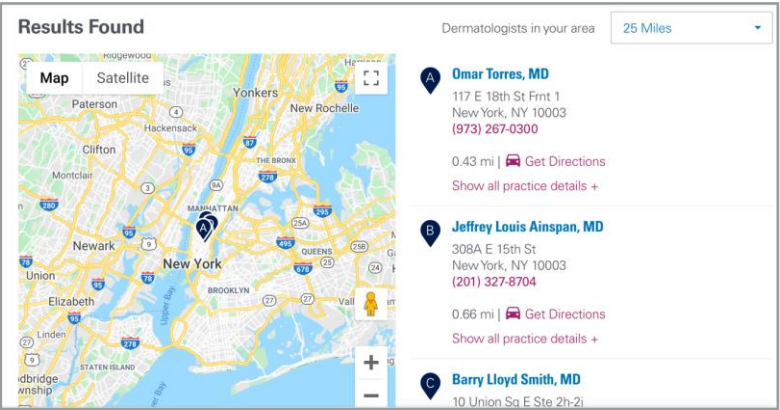
Proprietary Tools
50%
▼ **15 PP**
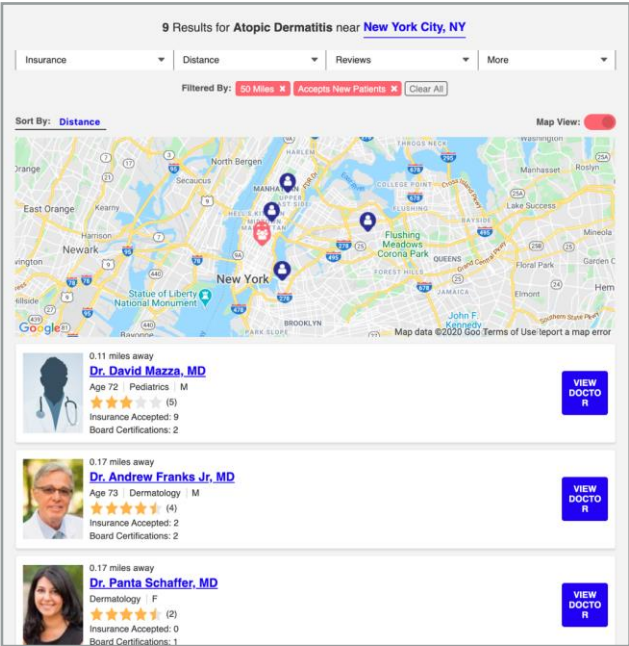
Vendor Partnership
(i.e. HealthGrades)
29%
▲ **9 PP**
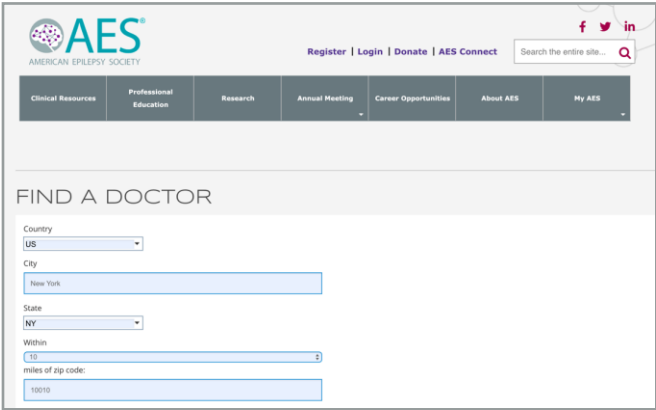
Drive to Association
(i.e. American Epilepsy Society)
21%
▼ **6 PP**

n= 28 brands with doctor finder tools

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Vraylar Guides Patients to Conversion
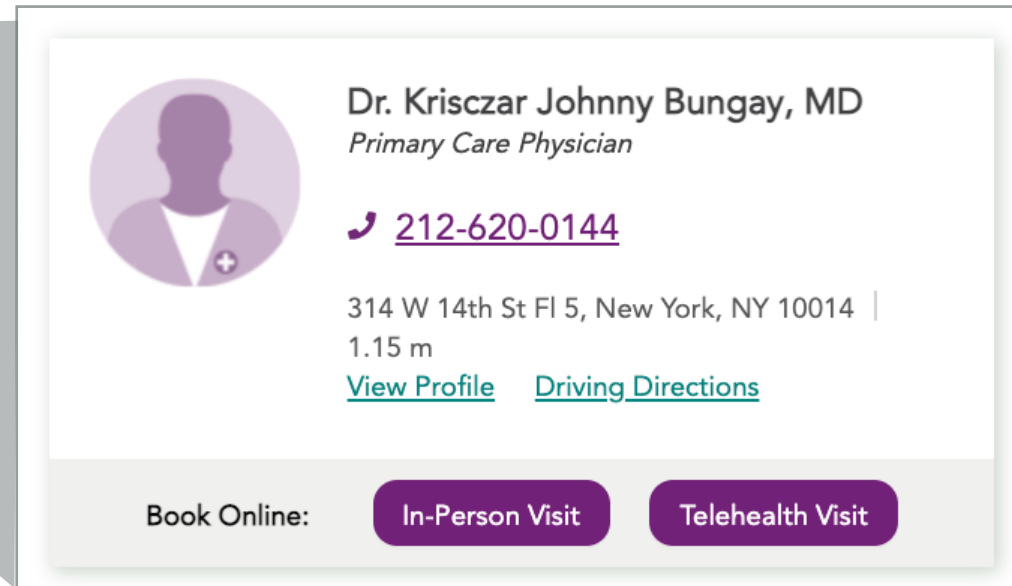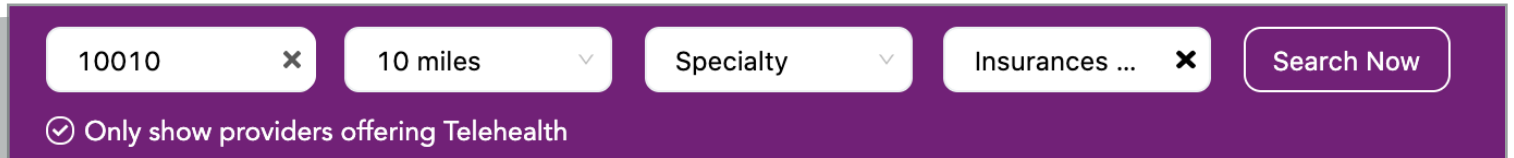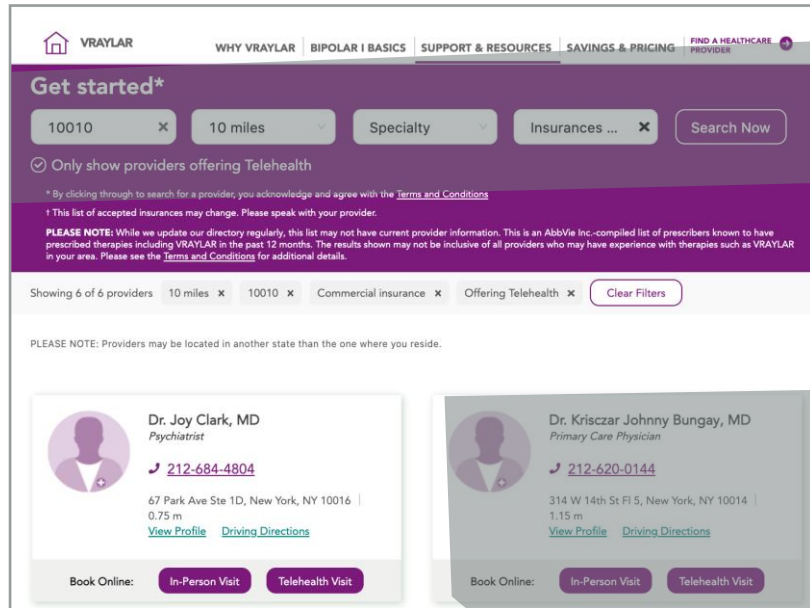
Make It Easy

Seeing the Doctor and Getting Treated

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The Acceleration of Virtual Care

649%

increase in searches for **"telehealth"** from Jan 2020 to Jan 2021
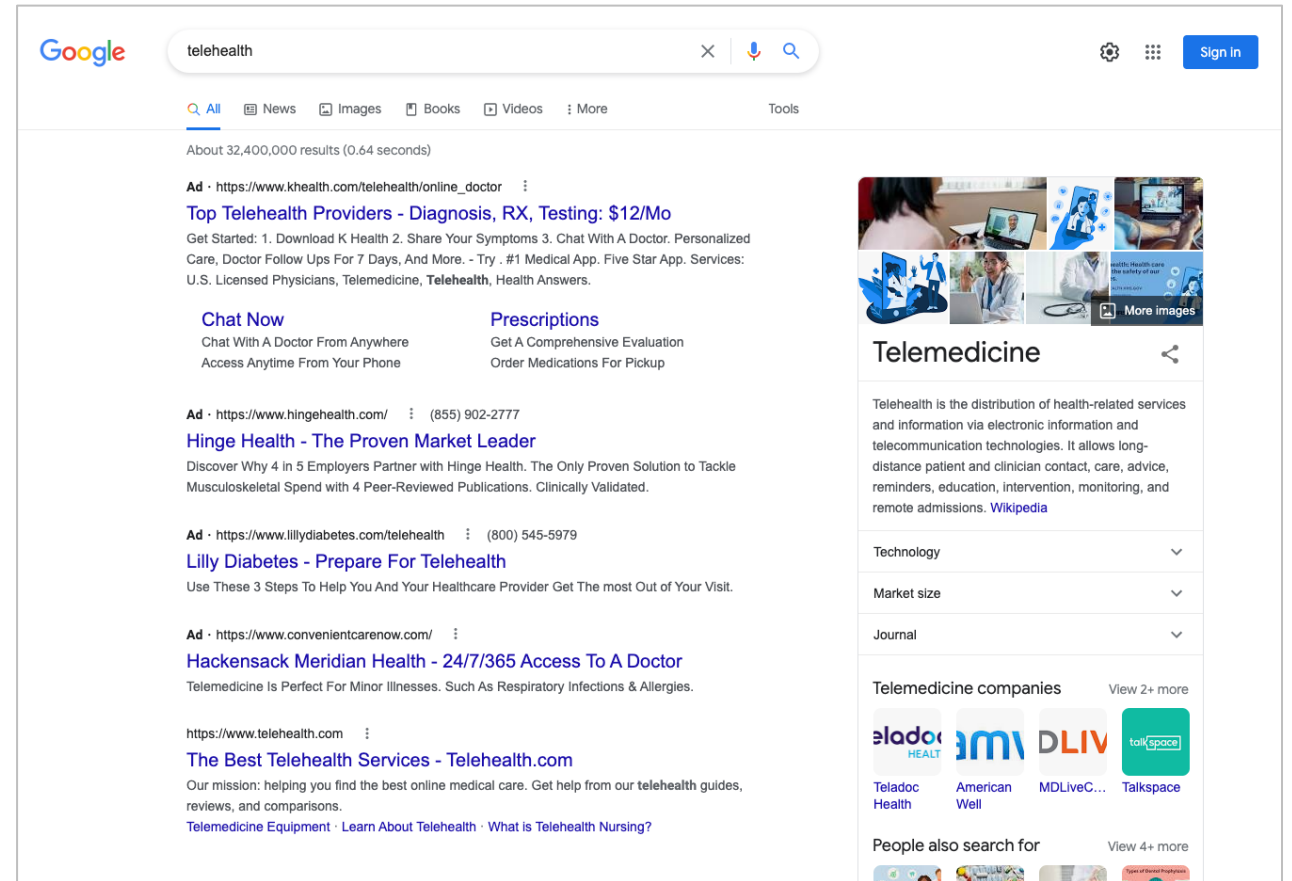
Source: SEMRush Reporting

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Hybrid: The New Normal

1H20 US Ambulatory Visits (millions)

- Total Visits
- Office Visits
- ▲ 500%
- Virtual Care Visits

9M
4.5M
0

Jan   Feb   Mar   Apr   May   Jun   Jul
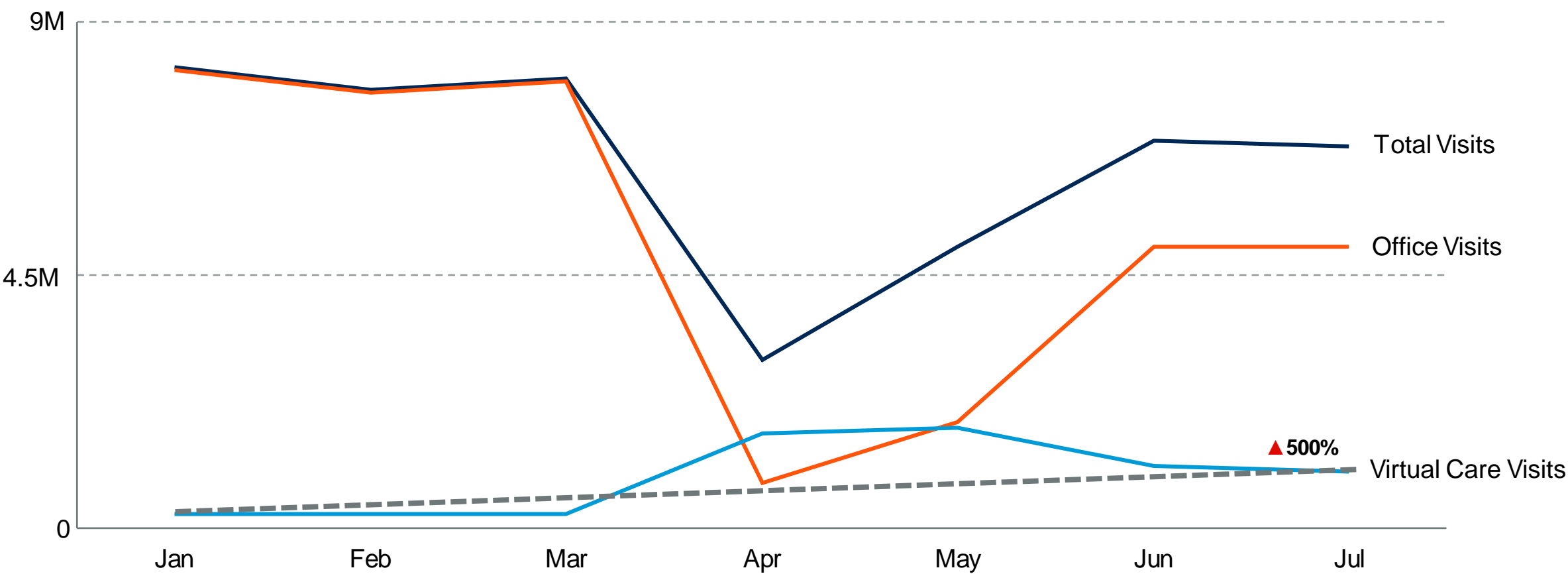
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Respondents Who Saw A Doctor or Sought Medical Help Virtually in Past 6 Months

Activities Done in the Past 6 Months, Total US Population

Activity	Percentage
Exercised, work out, (including jogging, biking for exercise, fitness classes, yoga, Pilates, etc.)	59%
Played video, computer, mobile or other electronic games	55%
Participated in a social network or social media site	51%
Entertained your friends, family, or colleagues at home	46%
Participate in virtual calls using conferencing tools (e.g. Zoom, Skype) to socialize with friends and family	42%
Saw a doctor or sought medical help virtually via a mobile app, text, chat or video chat	**35%**
Created, posted or shared your own opinions about issues or events in the news on social media platforms or other online sites	29%
Gone to the movies	23%
Managed your retirement plan and retirement investments	23%
Managed your non-retirement investments, such as stocks, funds or other investments	21%
Gone to a bar, pub, or nightclub/disco/karaoke bar	20%
None of these	2%

Scale: 0% — 30% — 60%

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Telehealth Education Should Align to Patient Values

Share of Consumers Citing Given Criteria as Primary Reason for Using a Virtual Doctor or Diagnosis Service
May 2020
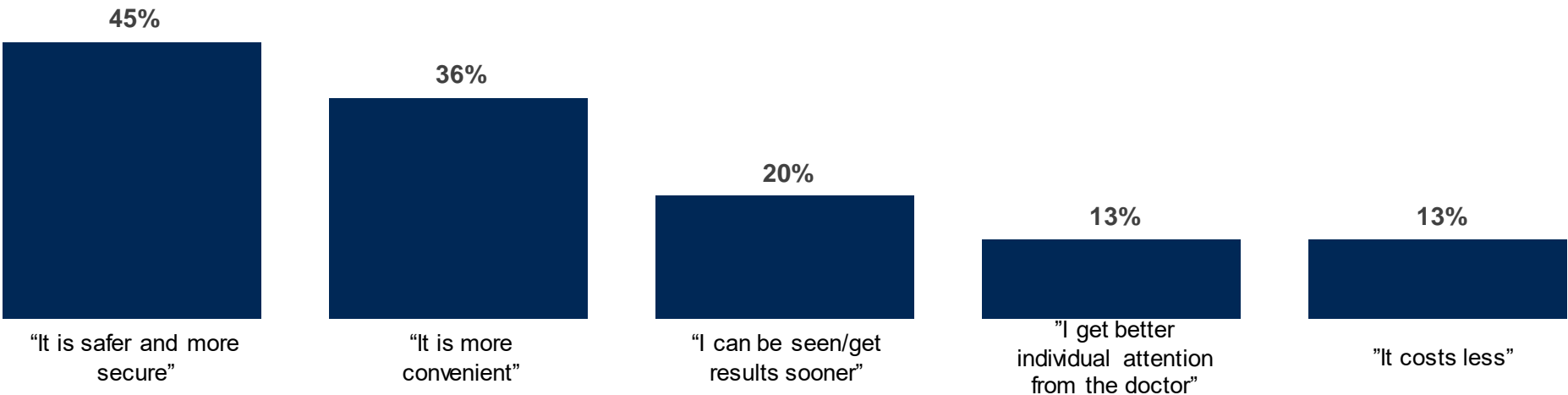
45%	36%	20%	13%	13%
"It is safer and more secure"	"It is more convenient"	"I can be seen/get results sooner"	"I get better individual attention from the doctor"	"It costs less"

Share of Health Systems Promoting Given Benefit on Telehealth Page
September 2020

45%	36%	20%	13%	13%
Secure and Safety	Convenience	Flexible Scheduling/Access to Providers	Quality of Care	Affordable Pricing

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The Continued Acceleration of Telehealth

Pharma Rx 2021: Telehealth Adoption by Therapeutic Area

May 2021

Telehealth Adoption by Brands/TA
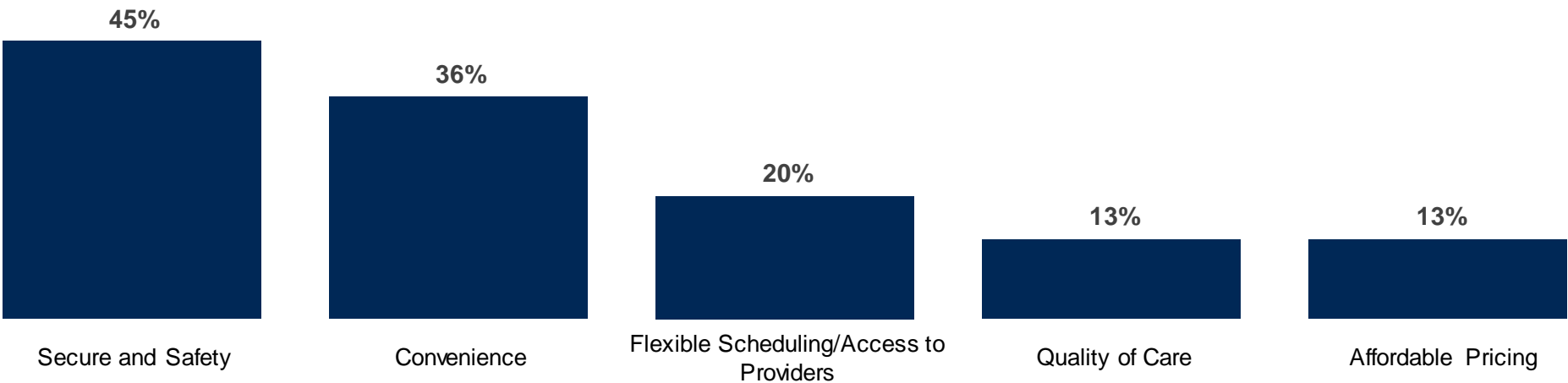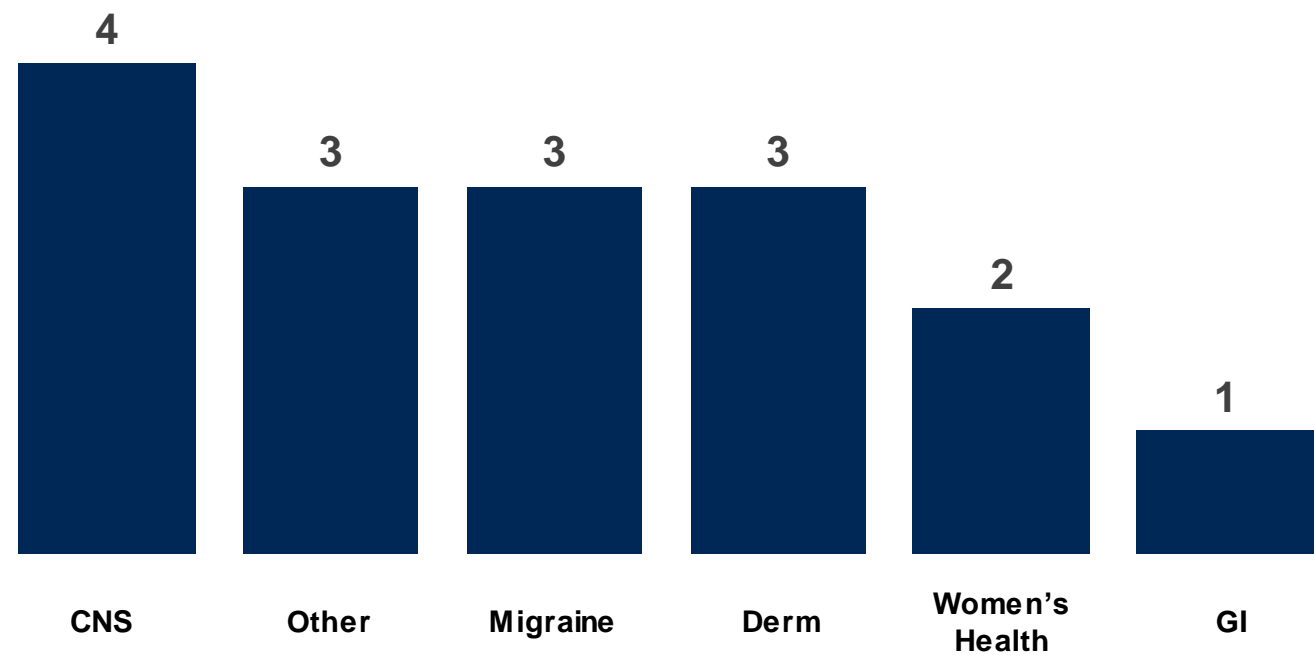
Source: Gartner Digital IQ Index: PharmaRx 2021

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Banner Health Makes the Value Proposition Clear

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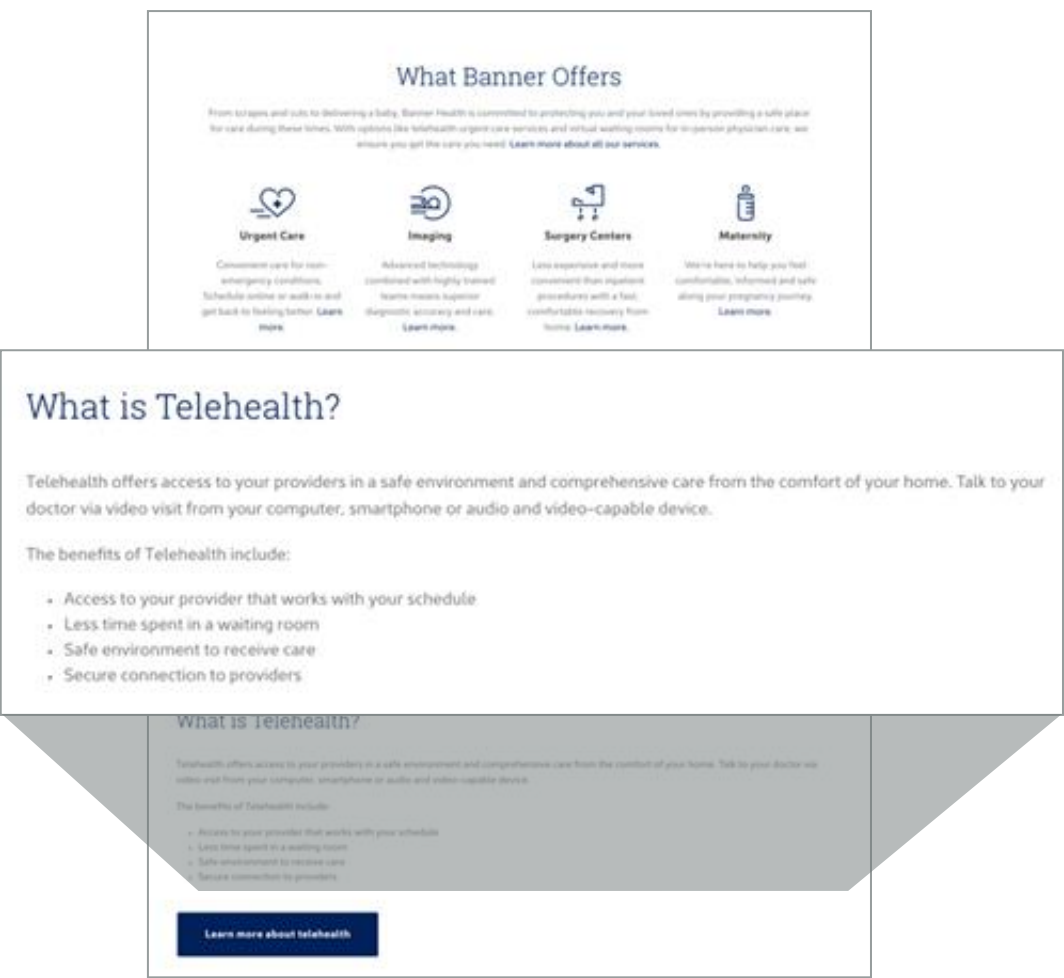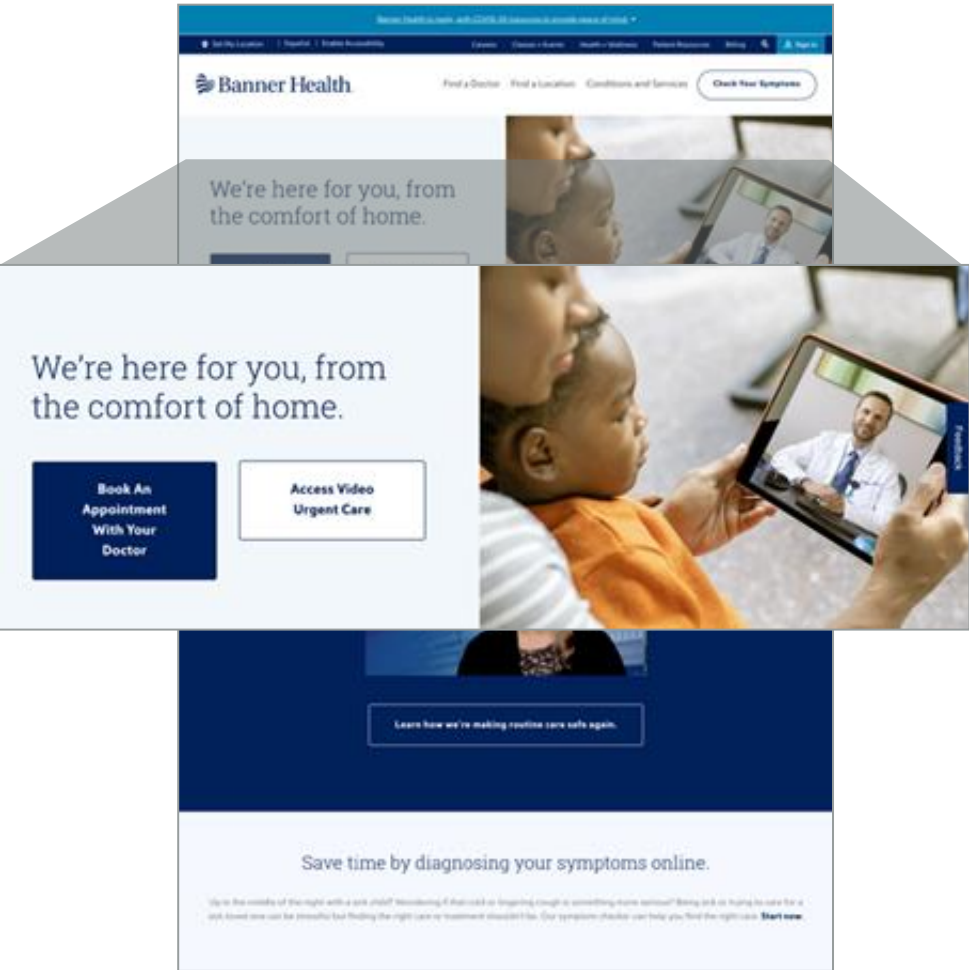
Virtual Visits are Integrated into Core Offerings
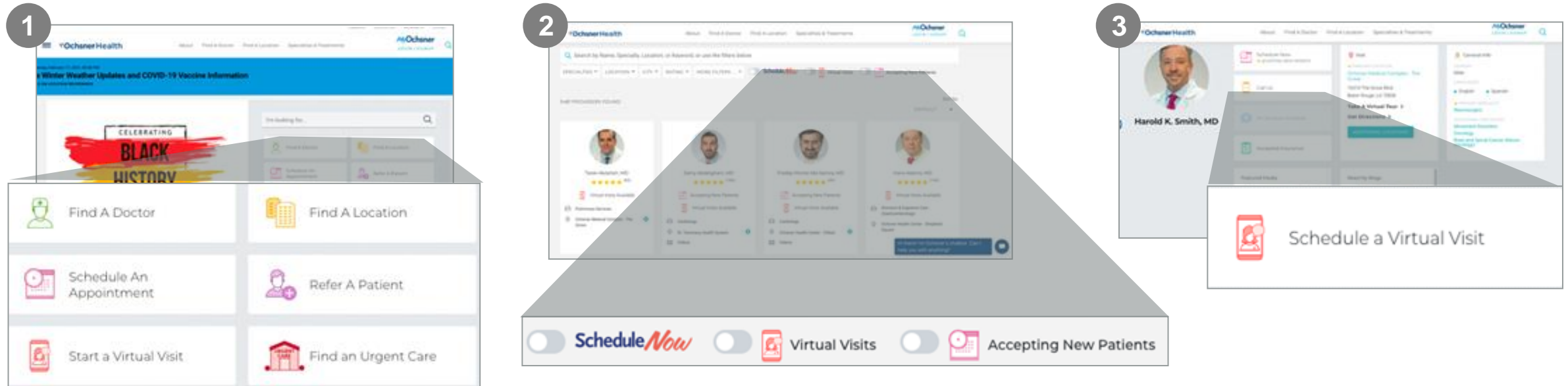
1. Virtual Visit option is prominently shown on homepage, with equal prominence as Schedule An Appointment
2. Doctor Finder tool allows patients to filter doctors by virtual visit availability
3. Individual doctor profile templates include option to schedule a virtual visit

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Access & Convenience

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Why Do Consumers Not Become Patients?

Which of the following reasons have caused you to NOT go to the doctor or a health professional despite having a health-related concern or issue?

■ US Total

Affordability

Response	%
I fear that I may contract some other virus/disease at the medical office	26%
I'm concerned about not being able to afford the visit and/or treatment	28%
I do not think their advice and/or treatment is worth the cost	13%
I do not trust their abilities to resolve my issues	14%
I do not trust that medical professionals have my best interest at heart	13%
I'd rather not know if something is actually wrong	13%
I do not have the time or flexibility in my schedule to fit in an appointment	22%
I do not have health insurance	15%
I do not have a regular physician or clinic to go to	14%
I do not know where to go for treatment	10%

Source: Gartner Values and Lifestyle Survey, September 2021

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The Pressure is Building for Pricing Transparency

Hospitals and Insurers Didn't Want You to See These Prices. Here's Why.

By Sarah Kliff and Josh Katz   Produced by Rumsey Taylor

Aug. 22, 2021

The New York Times

How to Look Up Prices at Your Hospital, if They Exist

Start with a web search. Consider a third-party tool. Expect frustration.

Hospital price lists were supposed to improve transparency—they haven't

BY MEGAN LEONHARDT

October 7, 2021 4:00 PM CDT

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Financial Anxiety is Prevalent for Americans

% of Consumers who agreed with the associated statements, by Generation

I am financially secure
- Gen Z: 46%
- Millennials: 55%
- Gen X: 47%
- Boomers: 54%

I am always concerned about having enough money
- Gen Z: 61%
- Millennials: 70%
- Gen X: 59%
- Boomers: 47%

I often live paycheck to paycheck
- Gen Z: 51%
- Millennials: 59%
- Gen X: 45%
- Boomers: 34%
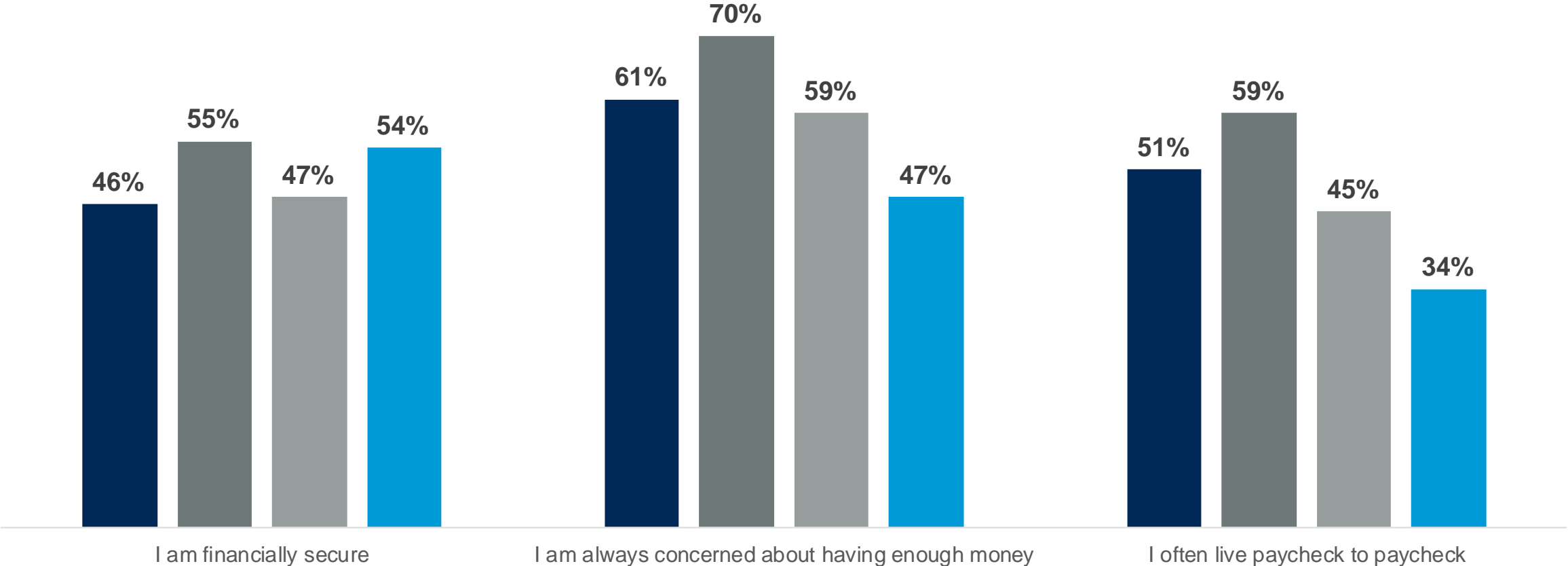
Legend: ■ Gen Z ■ Millennials ■ Gen X ■ Boomers

Source: Gartner Values and Lifestyle Survey, September 2021

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Pervasive Financial Anxiety and Insecurity Linked to Perceptions about Healthcare Costs

Percentage of surveyed consumers who agree with each statement:

	40%	44%	45%
	One major setback like a job loss, market crash, or unexpected health problem would have a major impact on my lifestyle	I am worried that routine medical and healthcare costs will hurt my financial stability in the future	I am worried that unexpected medical and healthcare costs will hurt my financial stability in the future
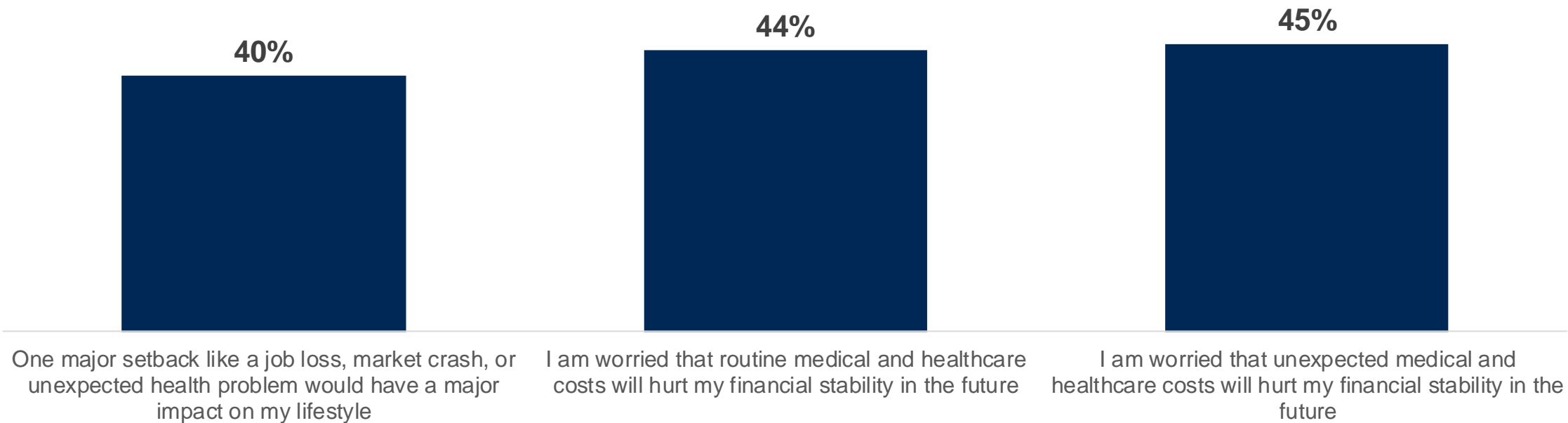
N=299
Source: Gartner Consumer Community May 27-June 3

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Fear of Medical Costs Leads Consumers to Avoid Seeking Care

Percentage of surveyed consumers who agree with each statement:

28% — A fear of incurring medical costs has kept/keeps me from seeking professional medical attention (Total)

42% — A fear of incurring medical costs has kept/keeps me from seeking professional medical attention (Younger Consumers)

30% — A fear of incurring medical costs has influenced me to forego certain elements of my healthcare to save money (e.g. choosing not to do recommended testing, etc.) (Total)

46% — A fear of incurring medical costs has influenced me to forego certain elements of my healthcare to save money (e.g. choosing not to do recommended testing, etc.) (Younger Consumers)

A fear of incurring medical costs has kept/keeps me from seeking professional medical attention

A fear of incurring medical costs has influenced me to forego certain elements of my healthcare to save money (e.g. choosing not to do recommended testing, etc.)

■ Total   ■ Younger Consumers (Gen Z & Millennials)

N=299
Source: Gartner Consumer Community May 27-June 3

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Cost is the Primary Factor When Making Healthcare Decisions for Majority of Americans

Percentage of Consumers who Agree with Either Statement, By Generation
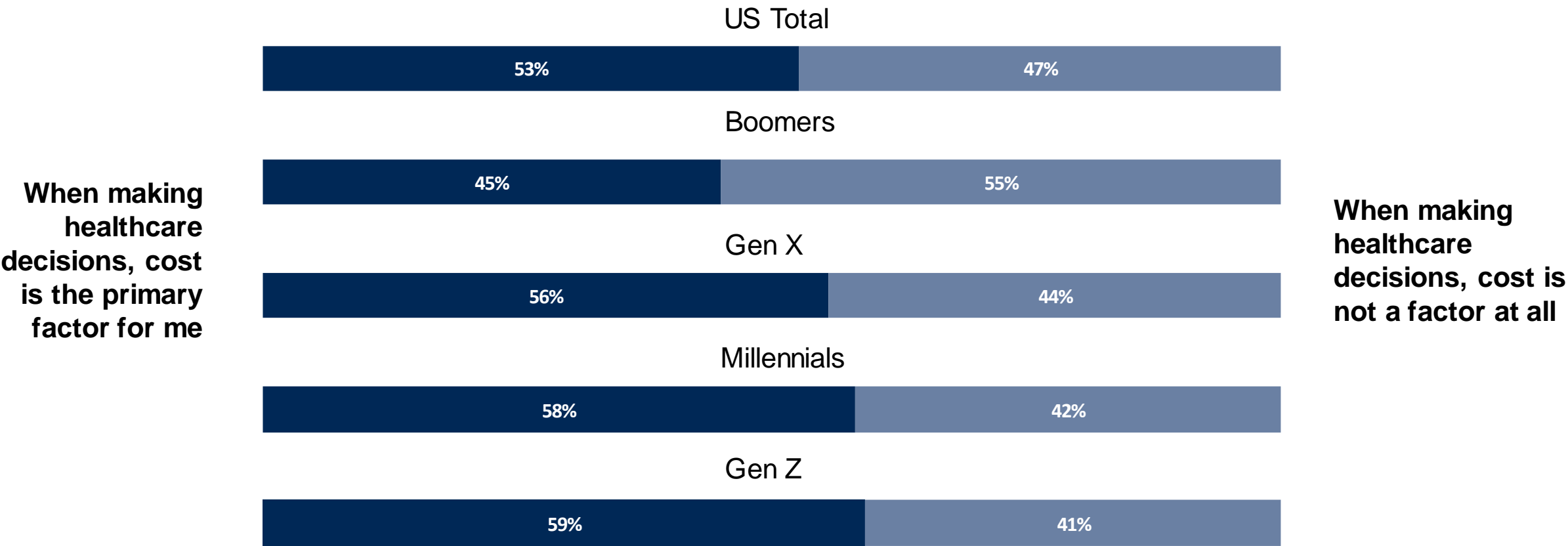
When making healthcare decisions, cost is the primary factor for me

When making healthcare decisions, cost is not a factor at all

US Total

| 53% | 47% |

Boomers

| 45% | 55% |

Gen X

| 56% | 44% |

Millennials

| 58% | 42% |

Gen Z

| 59% | 41% |

Source: Gartner Values and Lifestyle Survey, September 2021

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Majority of Consumers Say Upfront Understanding of Healthcare Costs Would Encourage Visits

Percentage of surveyed consumers who agree with the statement: I would be more likely to seek out medical treatment if I knew the costs upfront

N=299
Source: Gartner Consumer Community May 27-June 3

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Consumers Believe Providers are Most Responsible for Communicating Healthcare Costs

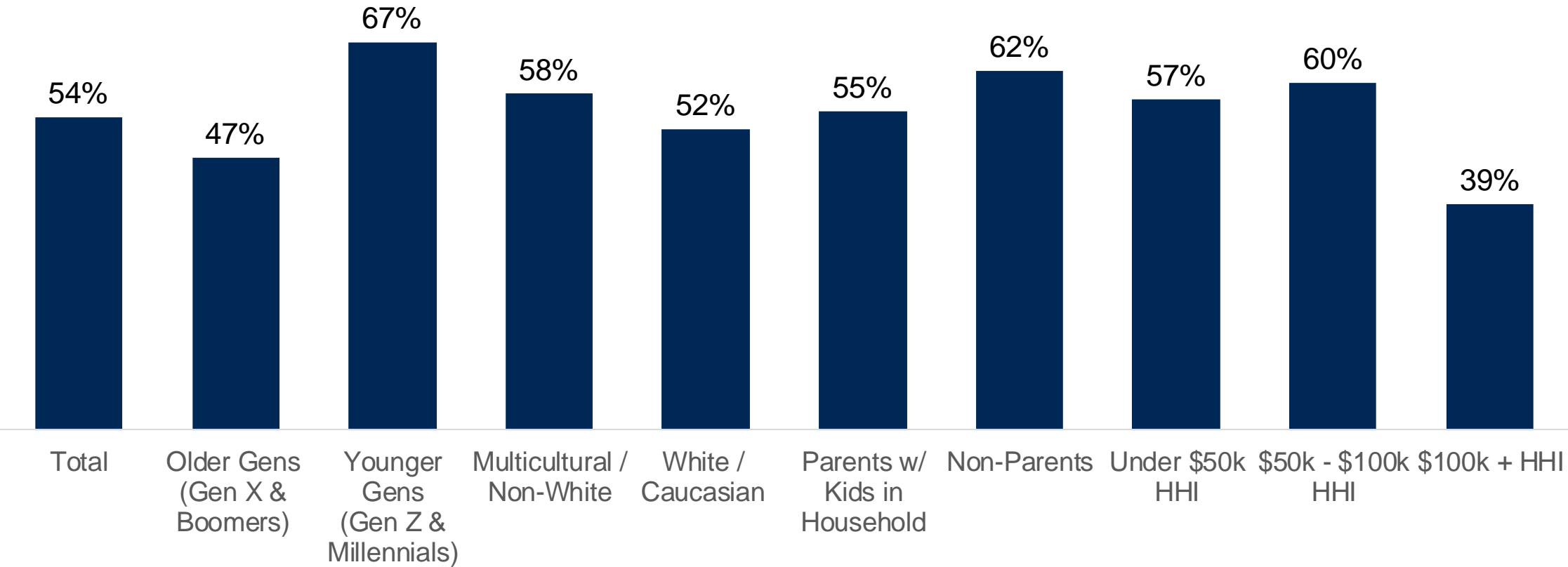Who do you feel is most responsible for clearly communicating healthcare costs – total AND out-of-pocket – to patients? (Select only one)
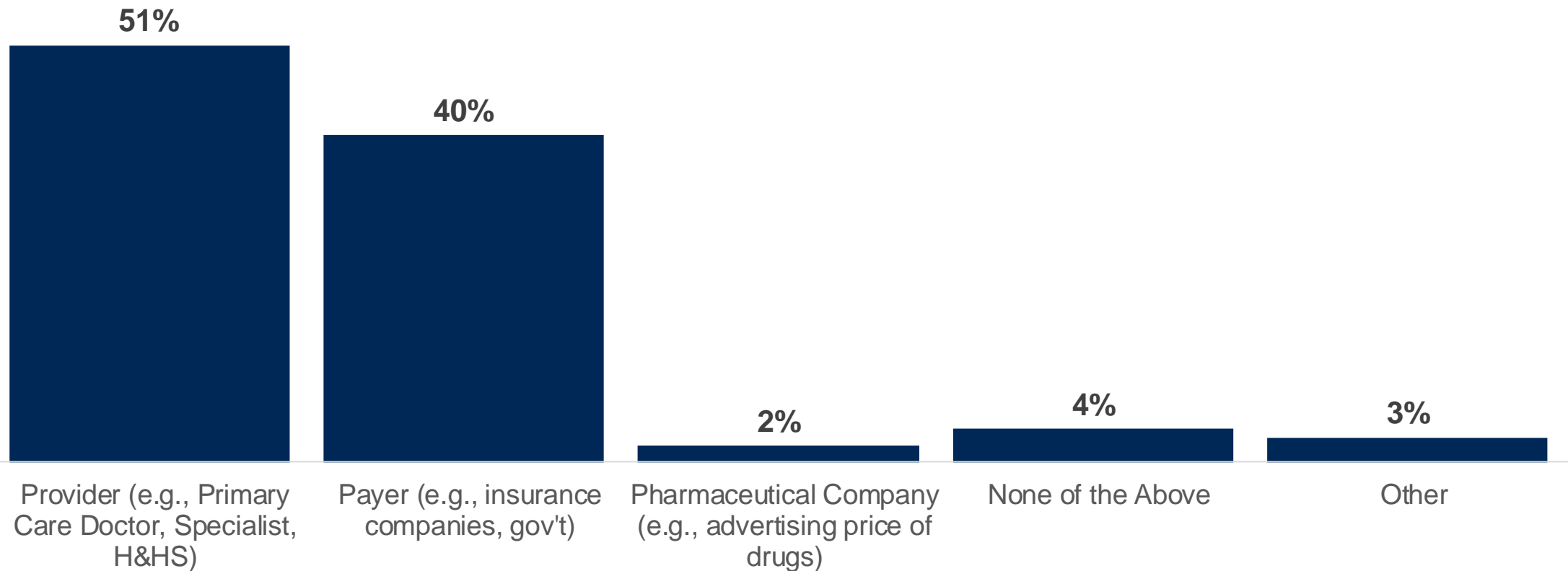
Category	Percentage
Provider (e.g., Primary Care Doctor, Specialist, H&HS)	51%
Payer (e.g., insurance companies, gov't)	40%
Pharmaceutical Company (e.g., advertising price of drugs)	2%
None of the Above	4%
Other	3%

N=299
Source: Gartner Consumer Community May 27-June 3

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Marketer Implications: Cost and Affordability

Acknowledge the Perceived Financial Burden of Healthcare Decisions

Front-Load Cost-Related Marketing and Tools to Better Align With Patient Journey

Streamline Data and Services to Encourage Potential Patients to More Accurately Determine OOP Costs Prior to Treatment

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Brand Example

Brand Example

HSS

★ Patient Experience

91%

Of patients **would recommend HSS;** over the national average of 72%

4.8 out of 5. Based on **18,491** patient ratings

Source: CMS Care Compare

＋ Comp...

1.8...

⊘ vs. 2.

Represents hip/...

Source: CMS Care Compar...

Navigating Knee Replacement Costs

You deserve more information about the services you're paying for so that you can avoid preventable costs and setbacks.

Receive a Price Estimate ❯

❝ Testimonial

It has been a year since my knee replacements, and I am riding the bike regularly, enjoying walks, and back on the tennis court.

Bruce, Knee Replacement

◢ Procedure Volume

4,964

Knee replacements per year, that's 278% more than the next leading hospital

Source: NYSDOH SPARCS 2017 Public Use File

✔ Cost Efficiency

26%

Less expensive over time than other NYC Tri-State Hospitals

0.80 HSS vs. **1.06** NYC Tri-State. Lower is better. 30-day episode cost ratio.

Source: FAIR Health, CY2019

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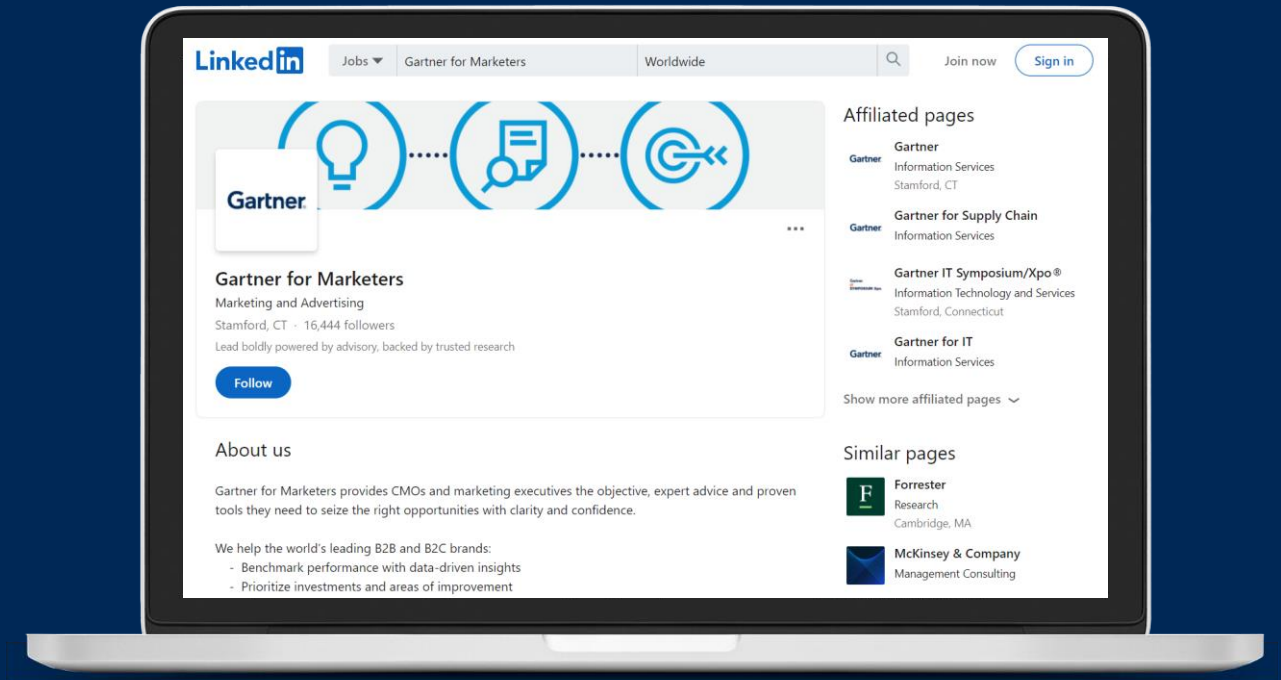
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