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Adapt to Evolving Consumer Expectations in Healthcare Marketing



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Chris Beland

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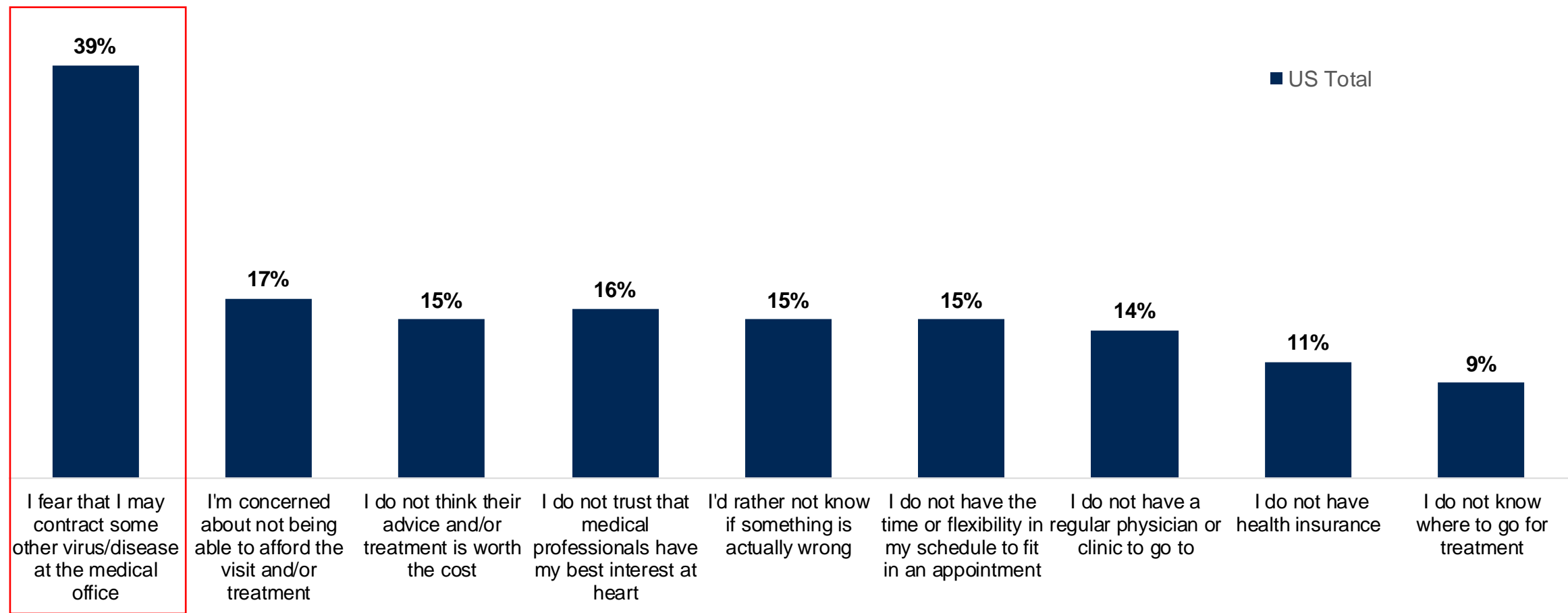
The Rise of Healthcare Consumerism



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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?



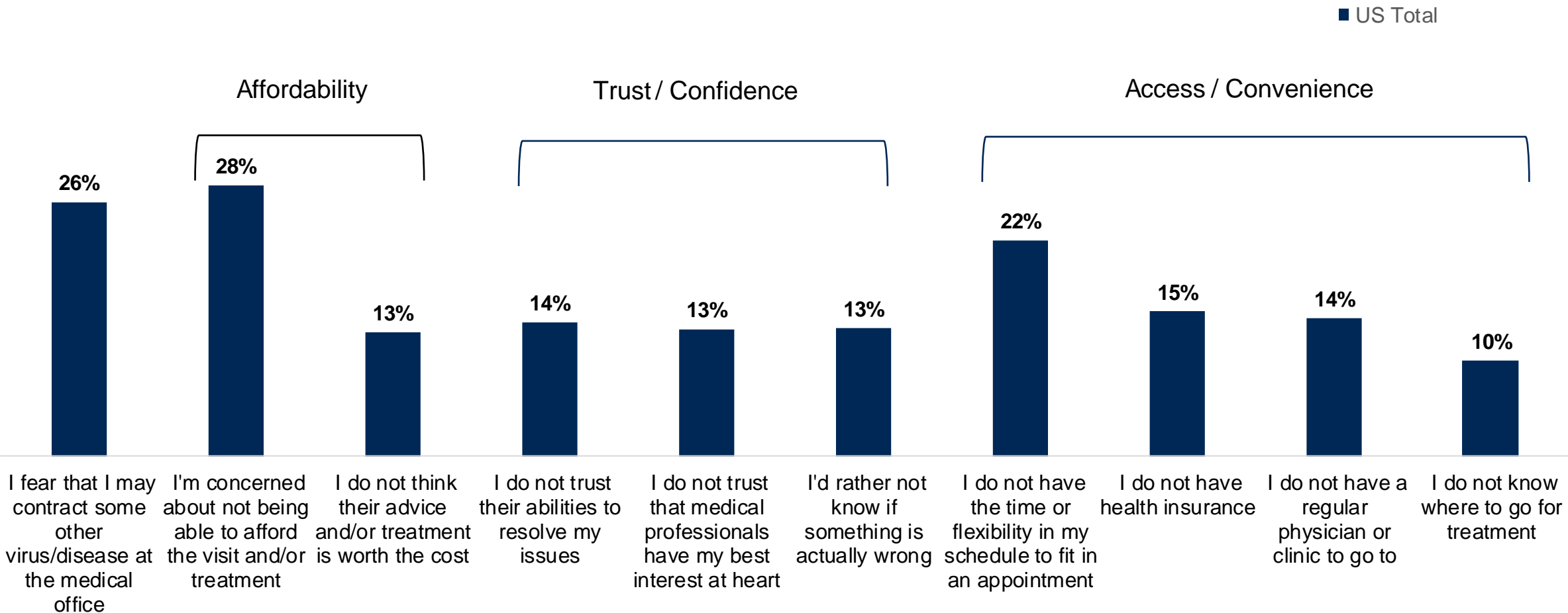
Source: Gartner Consumer Pandemic Attitudes and Behaviors Survey, May 2020
Base: Consumers who have not sought medical treatment in the past 12 months for an issue

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Why Do Consumers Not Become Patients?

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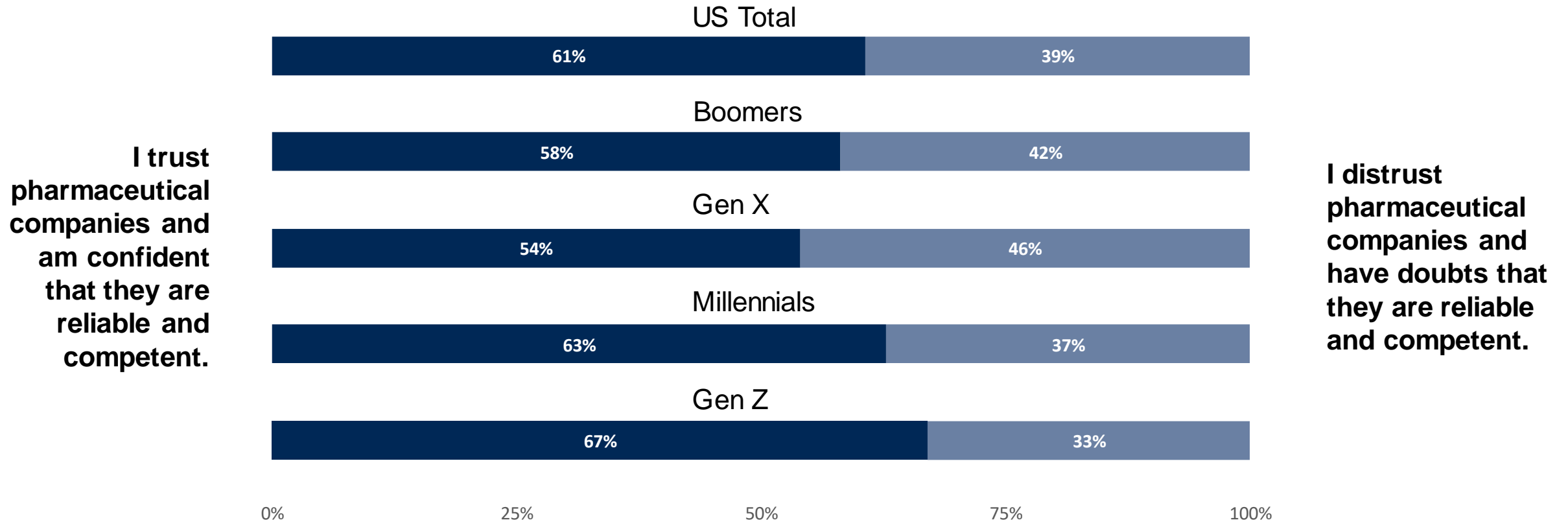
Source: Gartner Values and Lifestyle Survey, September 2021

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Trust & Confidence

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

Percentage of Consumers who Agree with Either Statement, by Generation

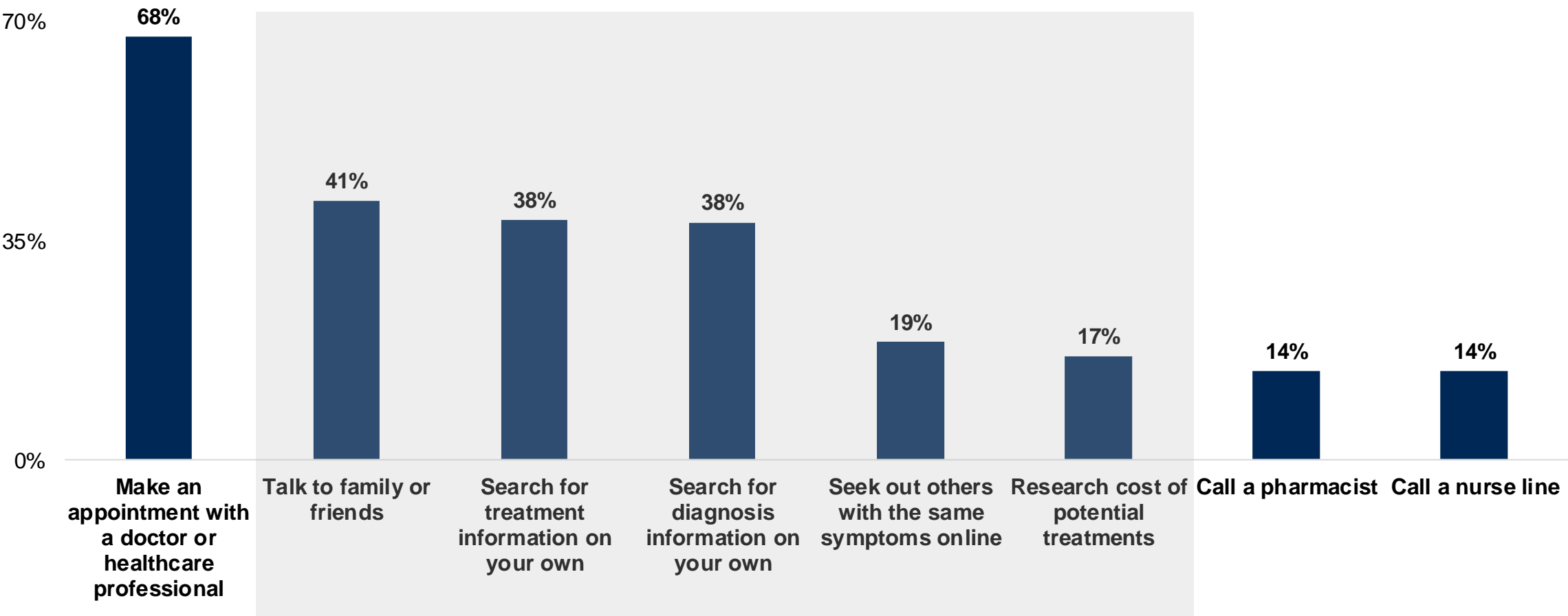


Source: Gartner Values and Lifestyle Survey, September 2021

RESTRICTED DISTRIBUTION

Empowered Consumers are Doing Their Own Health Research

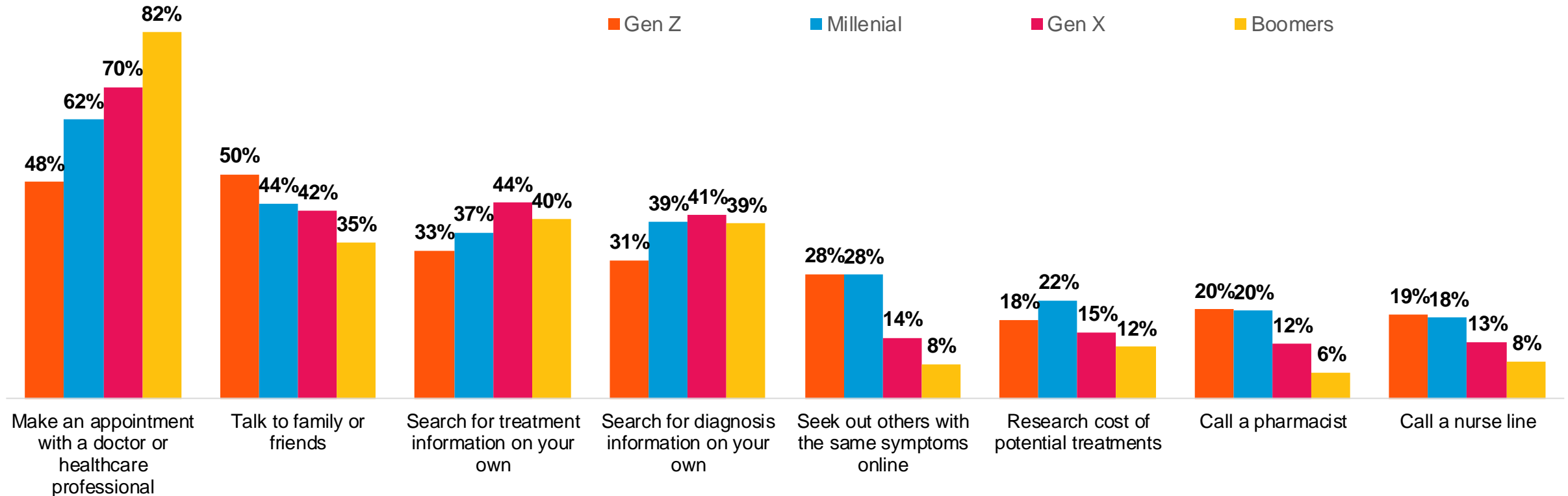
Percentage of consumers who do the following when a health issue arises, Total US Population



Source: Gartner Values and Lifestyle Survey, September 2021

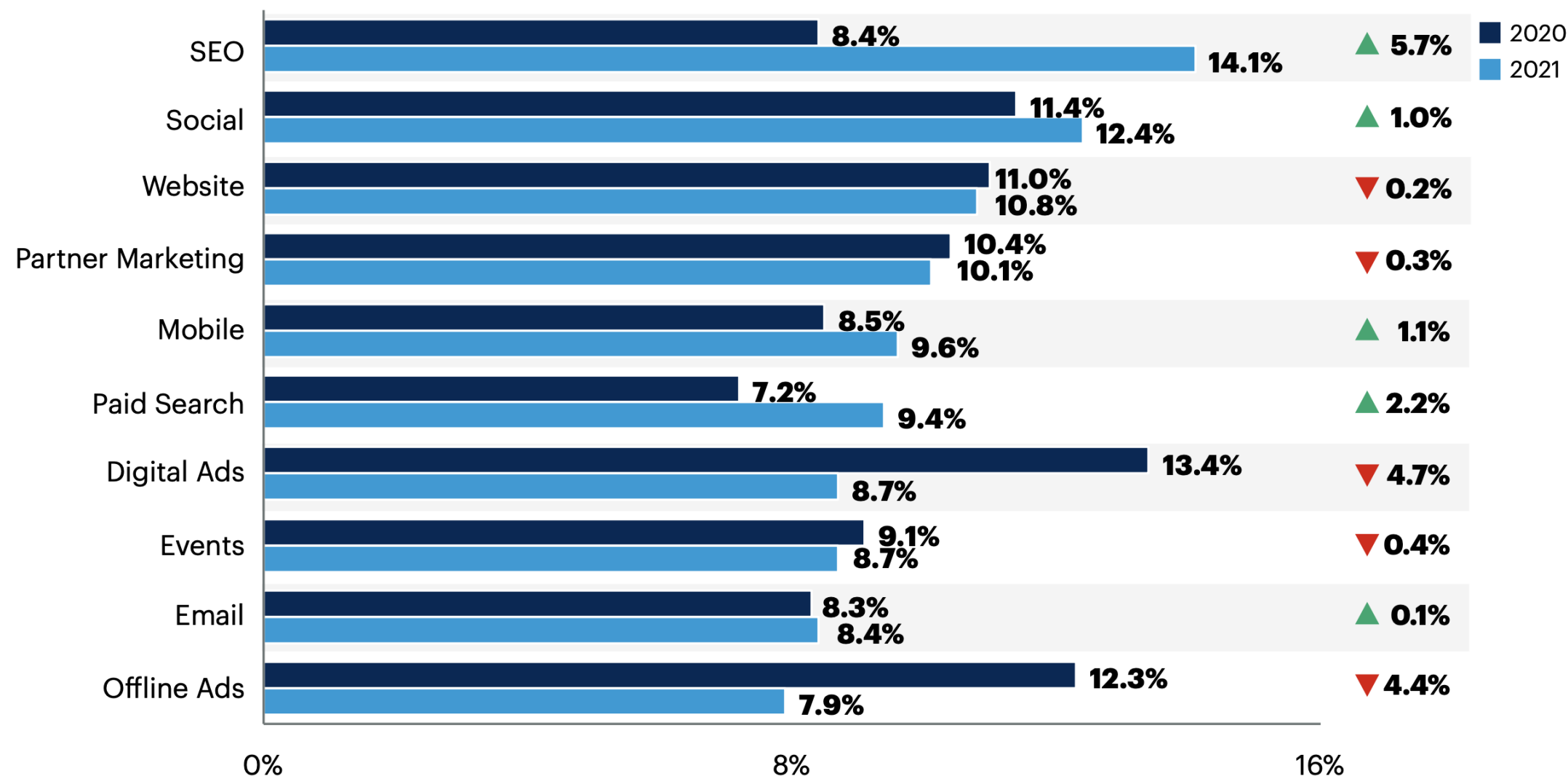
Younger Consumers More Likely to Explore Other Options

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



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Healthcare CMOs are Prioritizing SEO Efforts



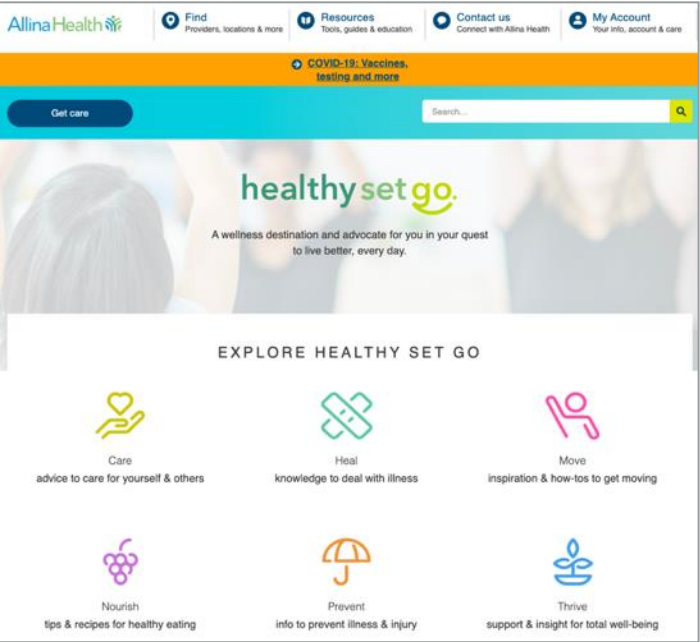
Source: CMO Spend Survey 2021: Marketing Budget Allocation by Channel for Healthcare CMOs

Hospitals Provide Educational Content as an Extension of their Offerings

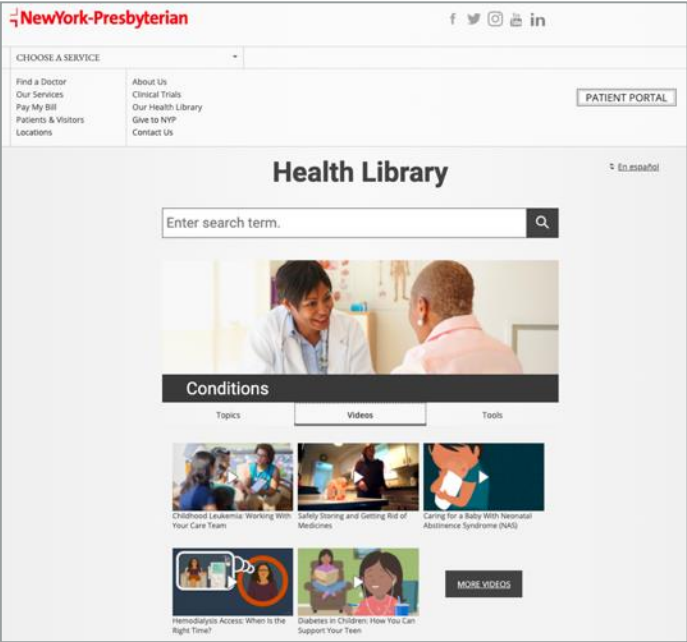
H&HS: Adoption of Healthcare Content on Hospital Websites

January 2021

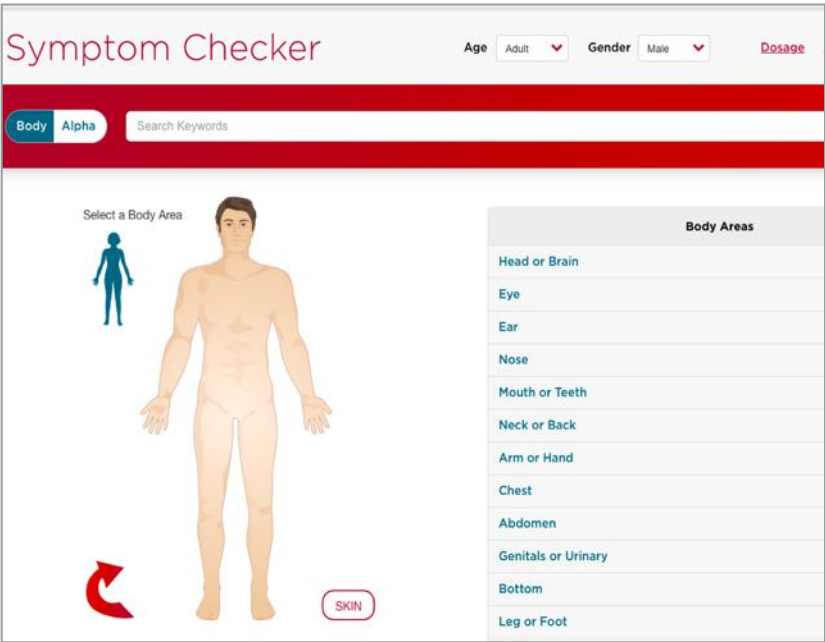
72% of Index Brands with Blogs/Editorial Content



60% of Index Brands with Health Libraries



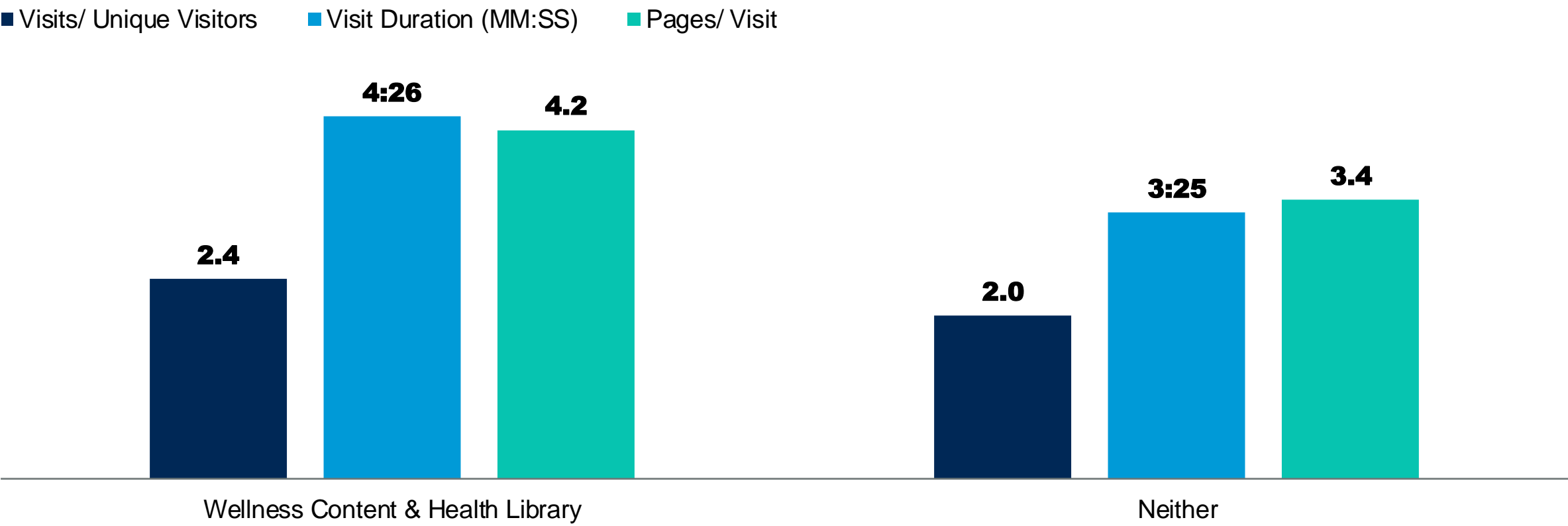
35% of Index Brands with Symptom Checkers



Health Content Makes Sites More Engaging

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

January-December 2020



n = 82 Index Brands
Source: Gartner Analysis of Similarweb data
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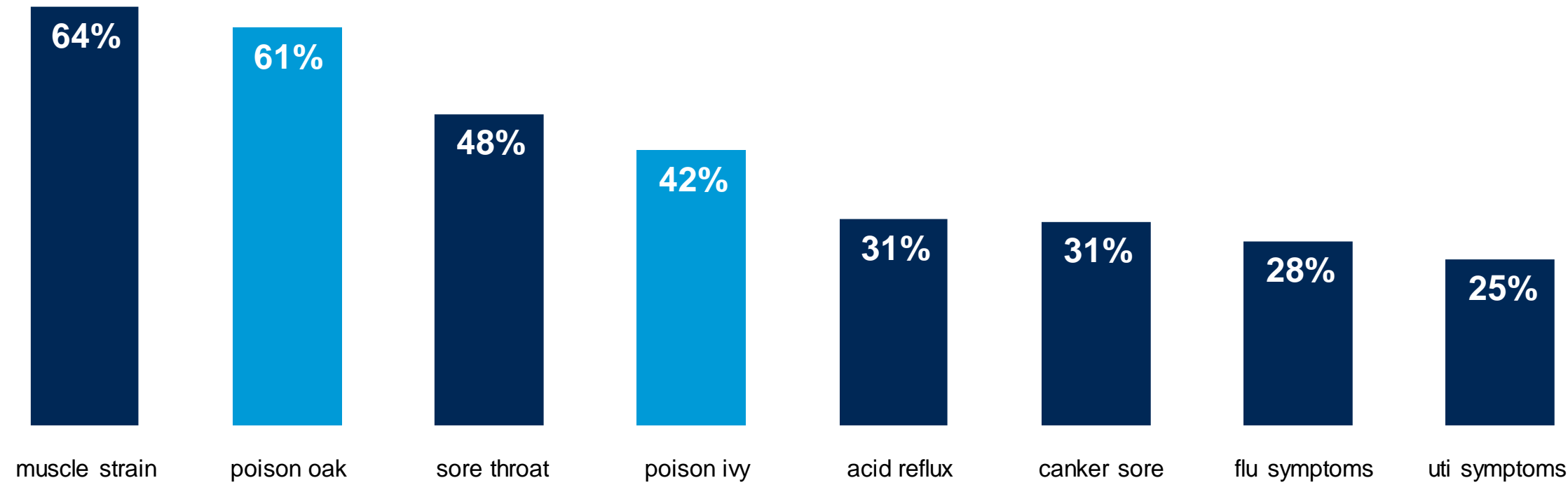
Consumers are Seeking Out Answers Related to Symptoms and Conditions

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



Source: Gartner analysis of Google Keyword Planner data.



...And Update With Robust Content Accordingly

Mayo Clinic

Patient Care & Health Information > Diseases & Conditions

Poison ivy rash

Request an Appointment

Symptoms & causes | Diagnosis & treatment

Overview

Poison ivy rash is caused by an allergic reaction to an oily resin called urushiol (u-ROO-she-ol). This oily resin is in the leaves, stems and roots of poison ivy, poison oak and poison sumac.

Wash your skin right away if you come into contact with this oil, unless you know you're not sensitive to it. Washing off the oil may reduce your chances of getting a poison ivy rash. If you develop a rash, it can be very itchy and last for weeks.

You can treat mild cases of poison ivy rash at home with soothing lotions and cool baths. You may need prescription medication for a rash that's severe or widespread, especially if it's on your face or genitals.

Poison ivy rash

Poison ivy rash on arm



Plant and symptom imagery
“poison ivy” appears 32X
“oak” and “sumac” appear 6+
Links to related articles
Last reviewed Oct 2020

Google

poison ivy

www.mayoclinic.org > symptoms-causes > syc-20376485

Poison ivy rash - Symptoms and causes - Mayo Clinic

Oct 17, 2020 — Poison ivy rash is caused by an allergic reaction to an oily resin called urushiol. It's found in poison ivy, poison oak and poison sumac. This oily resin is very sticky, so it easily attaches to your skin, clothing, tools, equipment and pet's fur. You can get a poison ivy reaction from: Touching the plant.

How to treat poison ivy rash · Poison ivy rash · Eruptión por hiedra venenosa

www.mayoclinic.org > symptoms-causes > syc-20376485

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Poison Ivy, Oak and Sumac: Pictures of Rashes & Plants

Fact. Poison ivy, poison oak, and poison sumac grow in wooded or marshy areas throughout North America. The plants aren't really poisonous. They have a ...

www.aad.org > public > diseases > itchy-skin > poison-ivy

Poison ivy, oak, and sumac: Who gets a rash, and is it ...

Poison ivy, oak, and sumac all contain an oil called urushiol (yur-oo-shee-ah). If you have an allergic reaction to this oil, you can develop a rash. Because most ...

www.healthline.com > health > outdoor-health > poison-ivy

Poison Ivy Rash: Pictures, Remedies, Prevention & More

Poison ivy rash is caused by contact with poison ivy, a plant that grows almost everywhere in the United States. The sap of the poison ivy plant, also known as ...

en.wikipedia.org > wiki > Poison_ivy

Poison ivy - Wikipedia

Poison ivy is an allergenic plant in the genus Toxicodendron native to Asia and North America. It is well known for causing urushiol-induced contact dermatitis, an itchy, irritating, and sometimes painful rash, in most people who touch it. The rash is caused by urushiol, a clear liquid compound in the plant's sap.

www.medicinenet.com > article

How to Get Rid of Poison Ivy, Oak & Sumac Rash: Treatment ...

Poison ivy, poison oak, and poison sumac are poisonous plants that can cause an itchy rash upon contact. A substance called urushiol, found in these plants, ...

www.fda.gov > consumers > consumer-updates > outsm...

Outsmarting Poison Ivy and Other Poisonous Plants | FDA

Aug 6, 2016 — Poison ivy, poison oak, and poison sumac are a hazard year-round. Here are tips for preventing and treating the itchy rash and blisters.

medlineplus.gov > Health Topics

Poison Ivy, Oak, and Sumac: MedlinePlus

Nov 6, 2020 — If you spend time outdoors, chances are you have been bothered by poison ivy, poison oak or poison sumac at some point. Most people are ...

my.clevelandclinic.org > health > articles > 10655-pois...

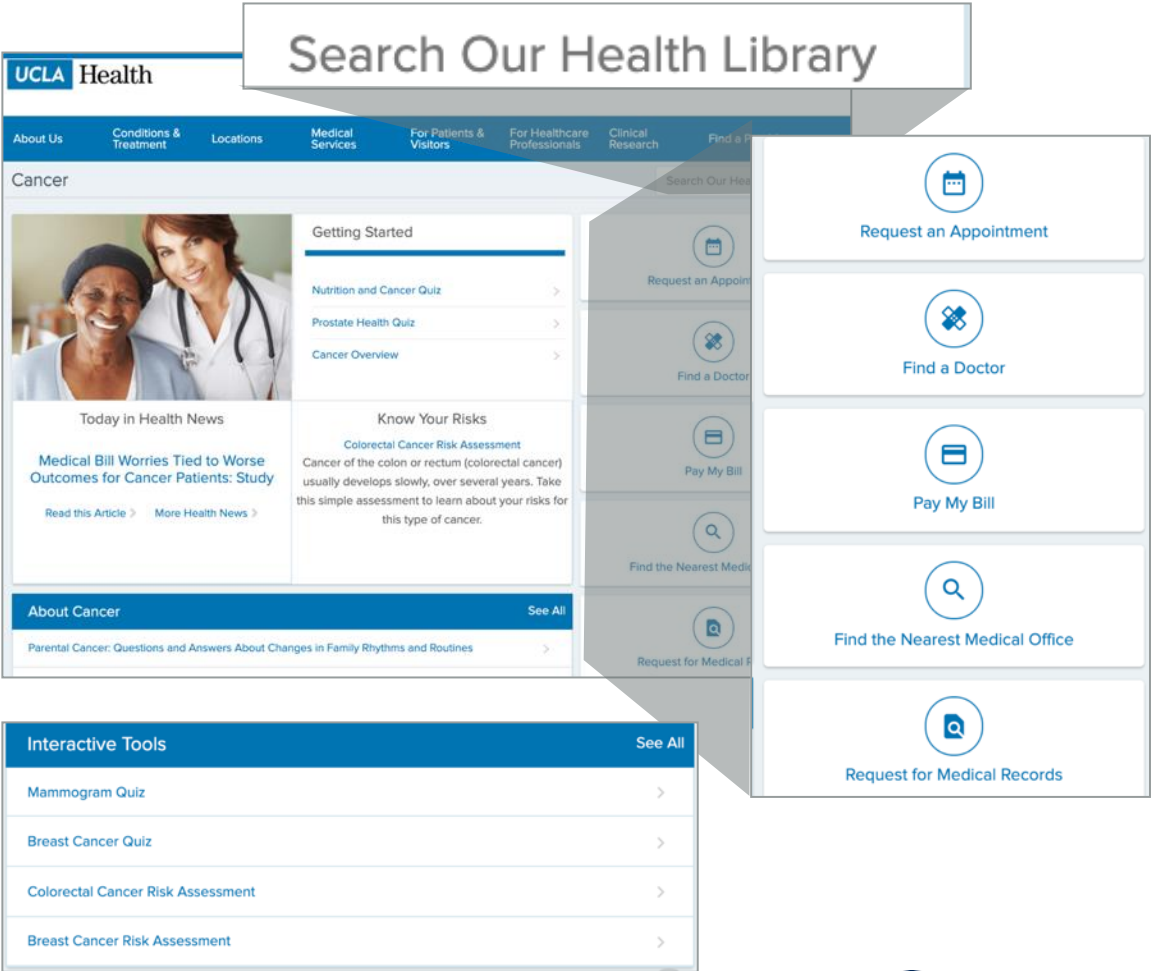
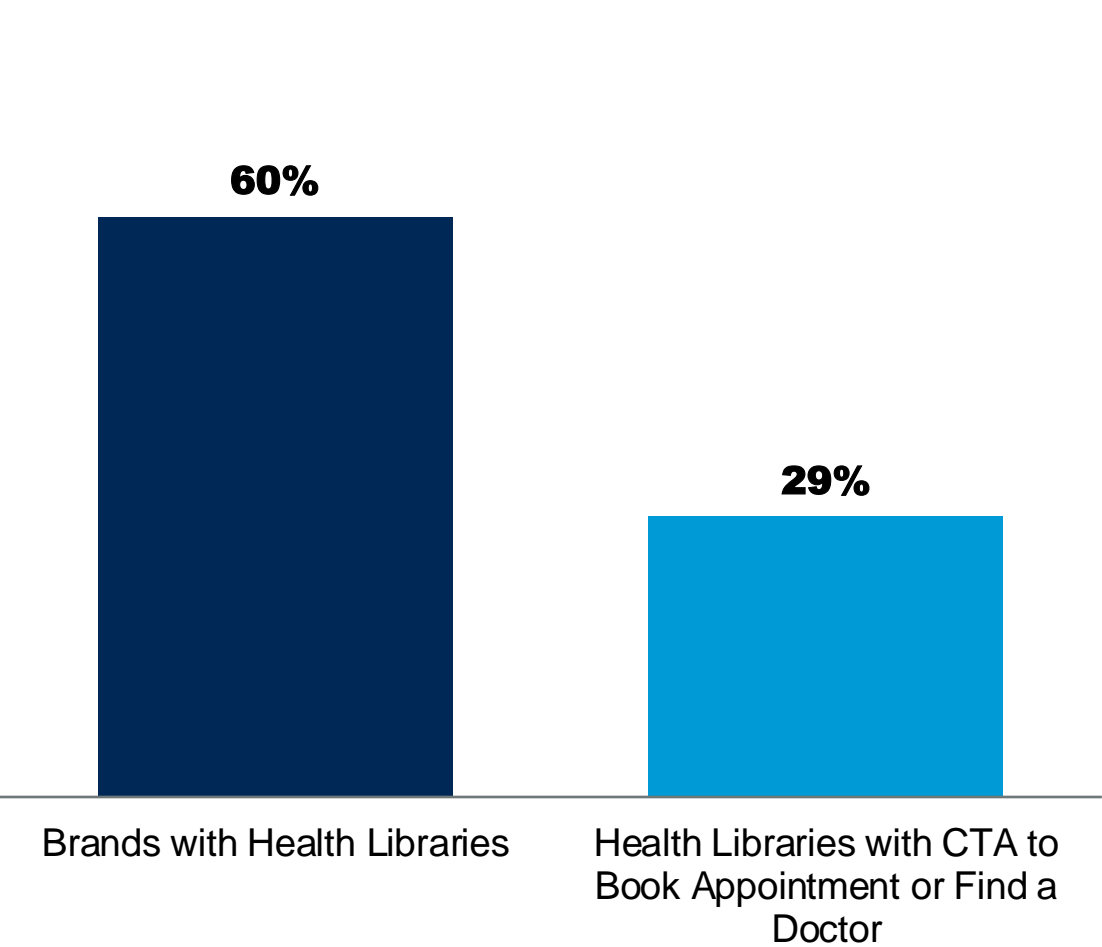
Poison Ivy: Poison Oak, Treatment, Symptoms, Relief ...

Aug 4, 2020 — What is poison ivy? Poison ivy is a common poisonous plant that causes an itchy skin rash. Other rash-inducing poisonous plants include poison ...

Brands Miss the Opportunity to Facilitate Follow-Ups

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

March 2021



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



Symptoms Checklist

Recommendations

Cedars Sinai

Academics Community MY CS LINK 1-800-CEDARS-1

Search by Keyword, Symptom, or Condition

FIND A DOCTOR LOCATIONS PROGRAMS & SERVICES HEALTH LIBRARY PATIENTS & VISITORS

COVID-19 (CORONAVIRUS) INFORMATION FOR PATIENTS & VISITORS

Conditions & Treatments Symptom Checker Video Library Prevention Guidelines Health Calculators Risk Assessments

Back Body Areas Head or Brain Headache

Headache

PROBLEM WHAT TO DO CARE ADVICE CAUSES AND INFO

Select the First Symptom that Applies

Most illnesses do not require a visit to the ER. Read each statement below (from top to bottom) and select the first one that matches your symptom(s).

- ☐ Trouble waking up or acting confused
- ☐ New weakness of the face, arm, or leg on one side of the body
- ☐ New numbness of the face, arm, or leg on one side of the body
- ☐ New slurred speech or trouble talking
- ☐ You think you have a life-threatening emergency
- ☐ Pain is severe and it's the worst headache of your life
- ☐ Pain is severe and you have not had severe headaches before
- ☐ Stiff neck (can't touch chin to the chest)
- ☐ Blurred vision or seeing double
- ☐ Walking is not steady
- ☐ May have been exposed to carbon monoxide
- ☒ Fever over 103° F (39.4° C)
- ☐ Fever over 100.4° F (38.0° C) and more than 60 years old
- ☐ Fever and have diabetes
- ☐ Fever and have a weak immune system (such as HIV, cancer chemo, long-term steroids, splenectomy, transplant)
- ☐ Fever and are bedridden (nursing home patient, stroke, chronic illness, or recovering from surgery)
- ☐ You feel weak or very sick
- ☐ You think you need to be seen, and the problem is urgent
- ☐ Sinus pain of forehead with a runny or stuffy nose
- ☒ New headache and more than 50 years old
- ☐ New headache and weak immune system (HIV, cancer chemo, long-term steroid use, splenectomy)
- ☐ Fever lasts more than 3 days
- ☐ You think you need to be seen, but the problem is not urgent
- ☒ Headache lasts more than 24 hours
- ☐ Headaches off and on for weeks or months (are frequent, come and go)
- ☐ Headache started during sex
- ☐ You have other questions or concerns
- ☒ Mild to moderate headache
- ☐ Had a migraine headache like this before
- ☐ Had a muscle tension headache like this before

RECOMMENDATION

Self Care at Home

SEE CARE ADVICE

SYMPTOMS

- ☒ Mild to moderate headache
- ☒ Had a migraine headache like this before

RECOMMENDATION

Contact Doctor During Office Hours

FIND A DOCTOR

FIND AN URGENT CARE

SEE CARE ADVICE

SYMPTOMS

- ☒ Headache lasts more than 24 hours
- ☒ Mild to moderate headache

RECOMMENDATION

Contact Doctor Within 24 Hours

FIND A DOCTOR

FIND AN URGENT CARE

SEE CARE ADVICE

SYMPTOMS

- ☒ New headache and more than 50 years old
- ☒ Headache lasts more than 24 hours
- ☒ Mild to moderate headache

RECOMMENDATION

Go to ER Now

FIND AN ER

SYMPTOMS

- ☒ Pain is severe and you have not had severe headaches before
- ☒ New headache and more than 50 years old
- ☒ Headache lasts more than 24 hours
- ☒ Mild to moderate headache

RECOMMENDATION

Call 911 Now


CALL 911

SYMPTOMS

- ☒ New numbness of the face, arm, or leg on one side of the body
- ☒ Pain is severe and it's the worst headache of your life
- ☒ Pain is severe and you have not had severe headaches before
- ☒ New headache and more than 50 years old
- ☒ Headache lasts more than 24 hours
- ☒ Mild to moderate headache

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


HOW  NIT ARE YOU?


Choose the answer you think fits best for each question, and learn how each decision impacts your overall health.

QUESTION 1

Today's lunch is grilled chicken. What's the best choice for a side?


Steamed broccoli


Caesar salad with the works


Baked potato

How much do you know about Heart Failure?

HEART FAILURE IS A SUDDEN EVENT, LIKE A HEART ATTACK.

TRUE FALSE

Unlike a heart attack, which is considered an episodic event, Heart Failure is generally considered to be a chronic condition. This means that it won't go away and therefore requires ongoing management. A heart attack may be one of the causes of Heart Failure.

Test Your Knowledge
& Educate

"I want to track and understand how I feel on a daily basis"

The Daily Mood Monitor is a valuable resource to track and understand how you feel on a daily basis. On your next visit to your doctor, have a real conversation about your experiences by sharing this information.

[DOWNLOAD THE DAILY MOOD MONITOR](#)

Symptom Trackers to Facilitate
Discussion with Doctor

ASTHMA CONTROL TEST™
Thank you for taking the Asthma Control Test

YOUR SCORE IS

8

If your score is 19 or less, your asthma symptoms may not be well controlled and there may be more that you and your healthcare provider can do to help control them. You should make an appointment with your healthcare provider to share the results of this test and to discuss your asthma.

NOTE: If your score is 15 or less, this may be an indication that your asthma is very poorly controlled. Please contact your healthcare provider right away if this is the case.

As your asthma may change over time, take the Asthma Control Test periodically, no matter how well you feel, and continue to see your healthcare provider and share your test results on a regular basis to ensure you are taking the necessary steps to help keep your asthma symptoms well controlled.

The results of the questionnaire are not intended to diagnose a condition or disease state and do not replace the advice of a qualified healthcare professional.

Asthma Control Test is a trademark of QualityMetric Incorporated.

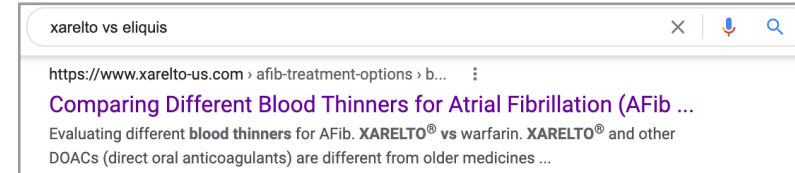
Facilitate Self-Diagnosis &
Highlight Severity of Disease

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



Peter J. Allen, MD
Gastrointestinal Surgeon, General Surgeon, Surgical Oncologist

★★★★★
4.89 out of 5
171 ratings, 34 reviews


919-660-9673



Ralph Abi Hachem, MD, MSc
Ear, Nose and Throat Doctor, Head and Neck Surgeon, Sinus Specialist

★★★★★
4.82 out of 5
226 ratings, 39 reviews


919-944-4258



Dane M. Barrett, MD
Facial Plastic Surgeon, Head and Neck Surgeon

★★★★★
4.79 out of 5
244 ratings, 35 reviews


919-220-2020



Peter J. Allen, MD
Gastrointestinal Surgeon, General Surgeon, Surgical Oncologist

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★★★★★
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244 ratings, 35 reviews

919-220-2020

LOCATIONS

Duke Cancer Center
20 Duke Medicine Circle
Durham, NC 27710

Get Directions

Duke Cancer Center
Gastrointestinal (GI) Clinic
20 Duke Medicine Cir
Durham, NC 27710-2000

Get Directions

Davis Ambulatory Surgical Center
120 E Carver St
Durham, NC 27704-2700

Get Directions

Duke Otolaryngology South
Durham
234 Crooked Creek Pkwy
Durham, NC 27713-8507


Get Directions

Davis Ambulatory Surgical Center
120 E Carver St
Durham, NC 27704-2700

Get Directions


Duke Aesthetic Center
3475 Erwin Rd
Durham, NC 27705-0005

Get Directions




I am a cancer surgeon who specializes in treating patients with pre-cancerous and cancerous conditions of the pancreas, liver, bile ducts, stomach, and adrenal glands. I initially trained and practiced at Walter Reed Army Medical Center in Washington, D.C. During this time, I served one year on a forward

Show More



I am an otolaryngologist, head and neck surgeon, and sinus specialist, with a special interest in diseases affecting the nose and sinuses, endoscopic sinus surgery and in-office sinus procedures, benign and malignant tumors of the nose, as well as diseases affecting the base of the skull that can be treated

Show More



I joined Duke Health as a facial plastic surgeon and otolaryngologist in August of 2016. My practice is concentrated on both reconstructive and aesthetic surgery of the head and neck. I have a strong passion in international humanitarian aid in the form of reconstructive surgery. I have traveled to Kenya, Bangladesh

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LANGUAGES

English

English

Arabic

French

Spanish

English

Spanish


CLINICAL TRIALS

[The 3PC Trial \(Intraductal Papillary Mucinous Neoplasms\)](#)
NCT# NCT04207944
IRB# PRO00103684

gynology, American Board of Otolaryngology, Otolaryngology


iced otolaryngology and Facial Plastic and Reconstructive Surgery, Division Health and Sciences






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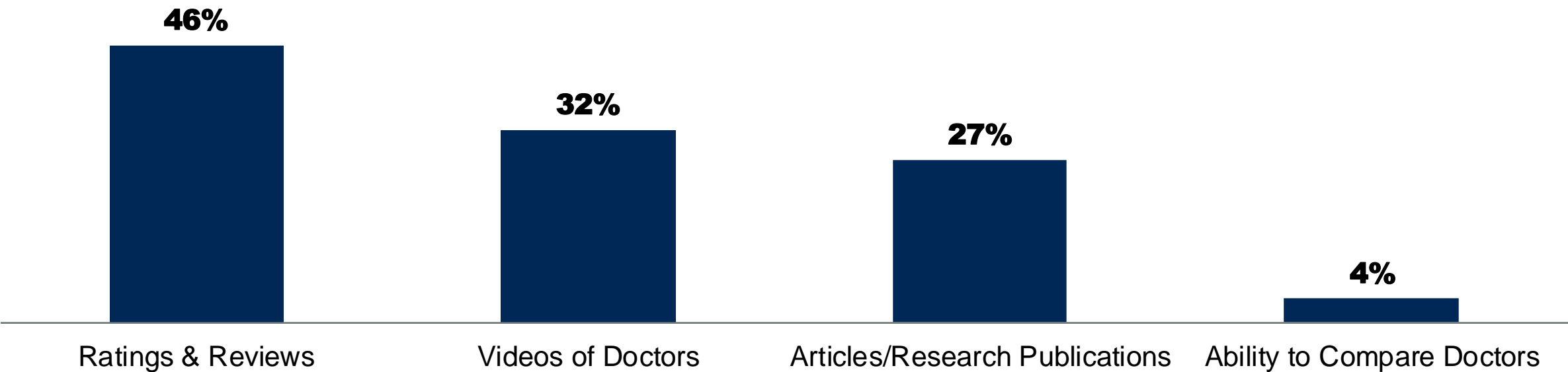
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Hospitals & Health Systems are Elevating Doctor Profiles to Establish Credibility

Index Adoption of Doctor Profile Features

January 2021



Source: Gartner data

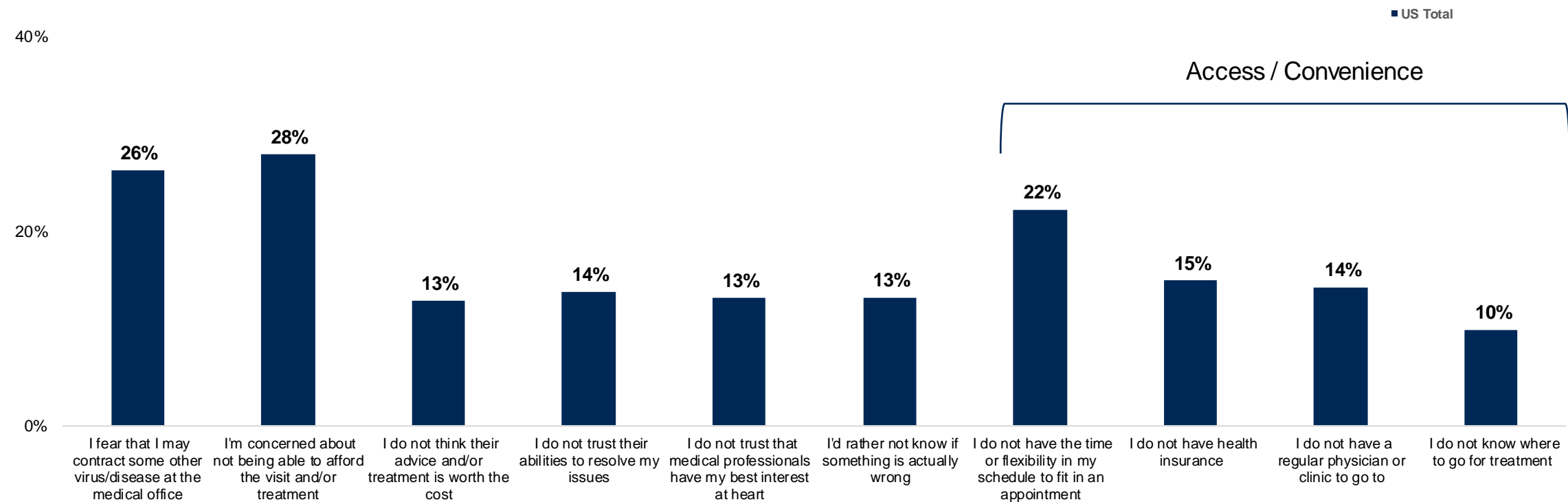


Access & Convenience



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

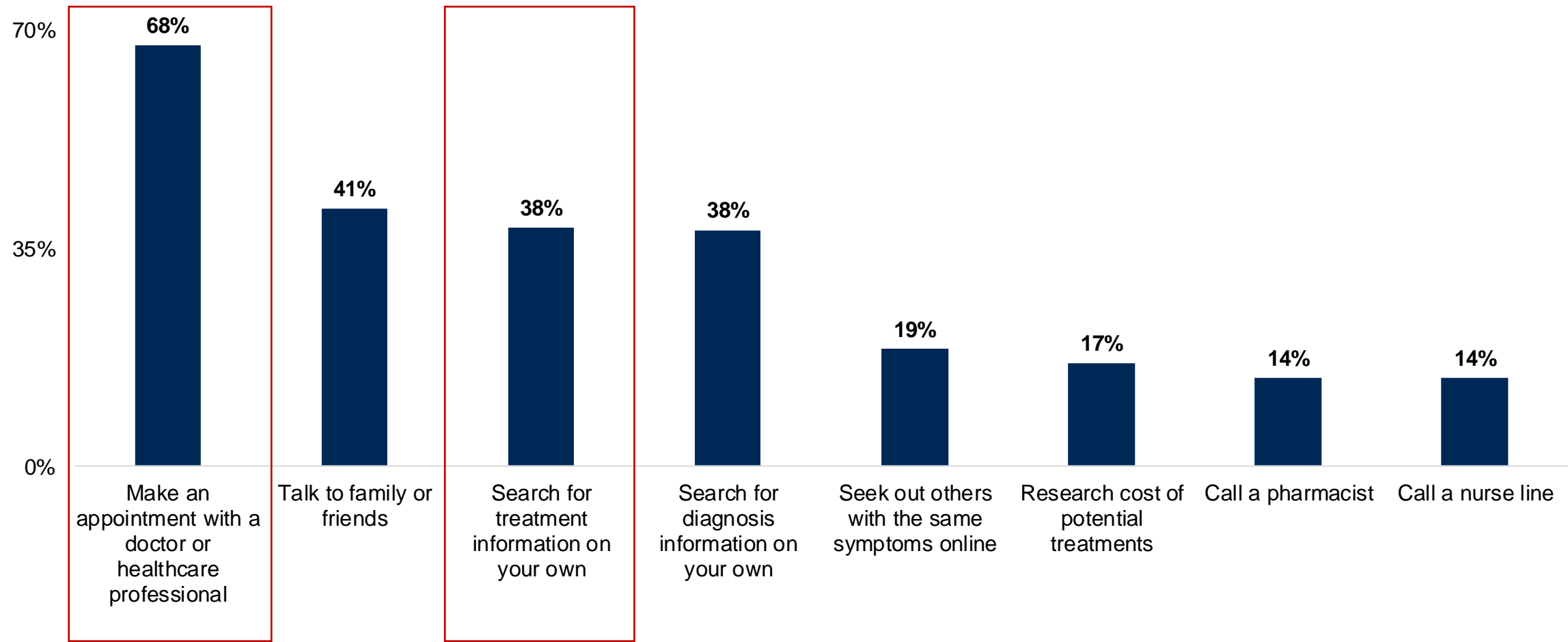
Which of the following reasons have caused you to NOT go to the doctor or a health professional despite having a health-related concern or issue?



Source: Gartner Valuesand Lifestyle Survey, September 2021

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



Source: Gartner Values and Lifestyle Survey, September 2021

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Make It Easy

Getting Started and Finding a Doctor

Wait Times to Empower Patients with Information

NYU Langone Health

Emergency Care Wait Times
Updated every 5 minutes. [Disclaimer](#)

Keeping Our Patients Safe
[Learn More](#)

Find a Doctor and Schedule
Search more than 4,000 doctors by specialty, condition, treatment, or name.

If you need care today, schedule a [virtual urgent care visit](#).

Emergency Care Wait Times

Updated every 5 minutes. [Disclaimer](#)

Ronald O. Perelman Center for Emergency Services	9 min.	• Emergency Department at NYU Langone Hospital—Brooklyn	12 min.
NYU Langone Health—Cobble Hill	41 min.	• Emergency Department at NYU Langone Hospital—Long Island	13 min.

Northwell Health

Wait times

Filter by area: Address, city or ZIP code:

Showing 91 results

View only: ☒ Emergency Departments ☒ GoHealth Urgent Care Centers ☒ Northwell Health Labs

East Northport
Northwell Health-GoHealth Urgent Care Center
4199 Jericho Turnpike
East Northport, NY 11731-6207
Phone: (631) 238-3066

Hewlett (Pediatric)
Northwell Health-GoHealth Urgent Care Center
1332 Peninsula Boulevard
Hewlett, NY 11557-1226
Phone: (516) 531-6130

[Get directions](#)
[Book an appointment](#)



Open until 10:00 pm

Wait: **60** +m

East Northport
Northwell Health-GoHealth Urgent Care Center

4199 Jericho Turnpike
East Northport, NY 11731-6207
Phone: (631) 238-3066

[Get directions](#)

[Book an appointment](#)

Gartner

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%

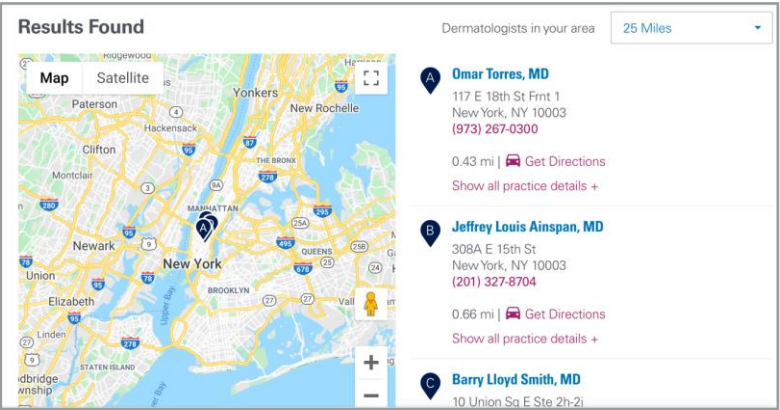
Source: Gartner Analysis of SEMrush Data

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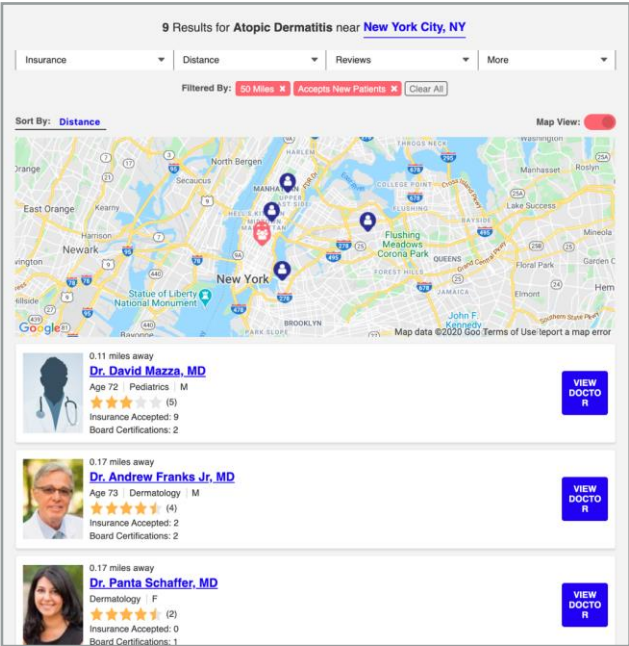
Gartner[®]

Pharma Brands Meet Demand with Homegrown and Off-the-Shelf Locators



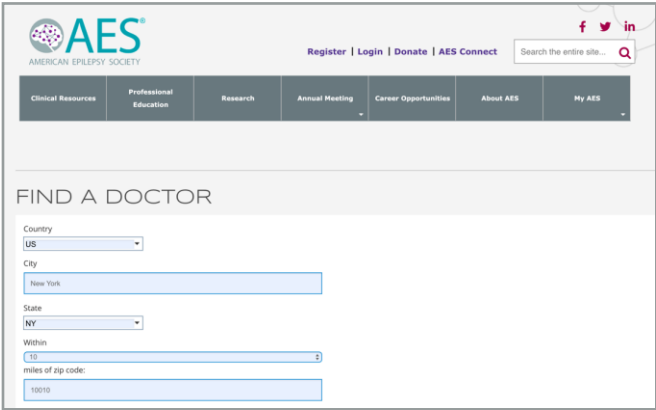
Proprietary Tools
50%

▼ **15 PP**



Vendor Partnership
(i.e. HealthGrades)
29%

▲ **9 PP**



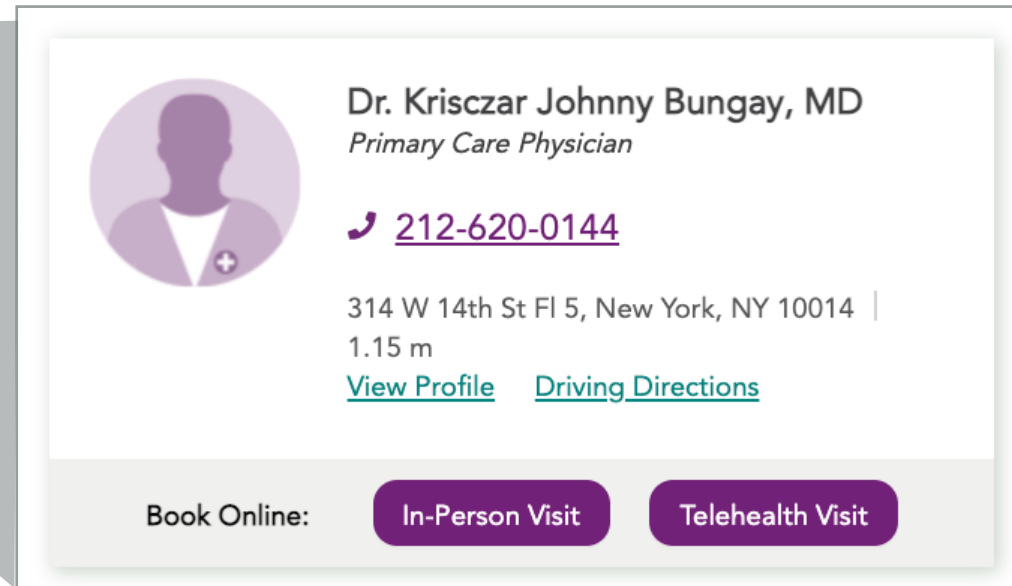
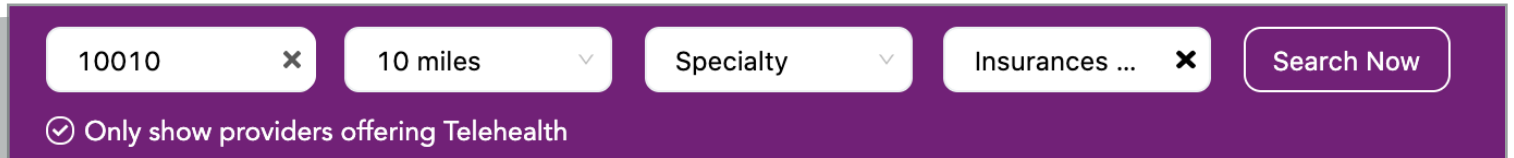
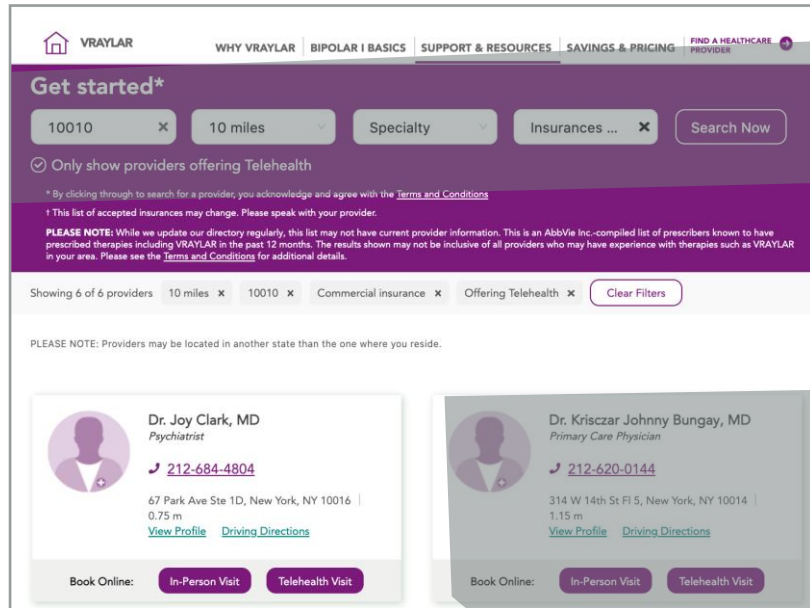
Drive to Association
(i.e. American Epilepsy Society)
21%

▼ **6 PP**

n= 28 brands with doctor finder tools
Source: Gartner Digital IQ Index: Pharma Rx US 202
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Vraylar Guides Patients to Conversion





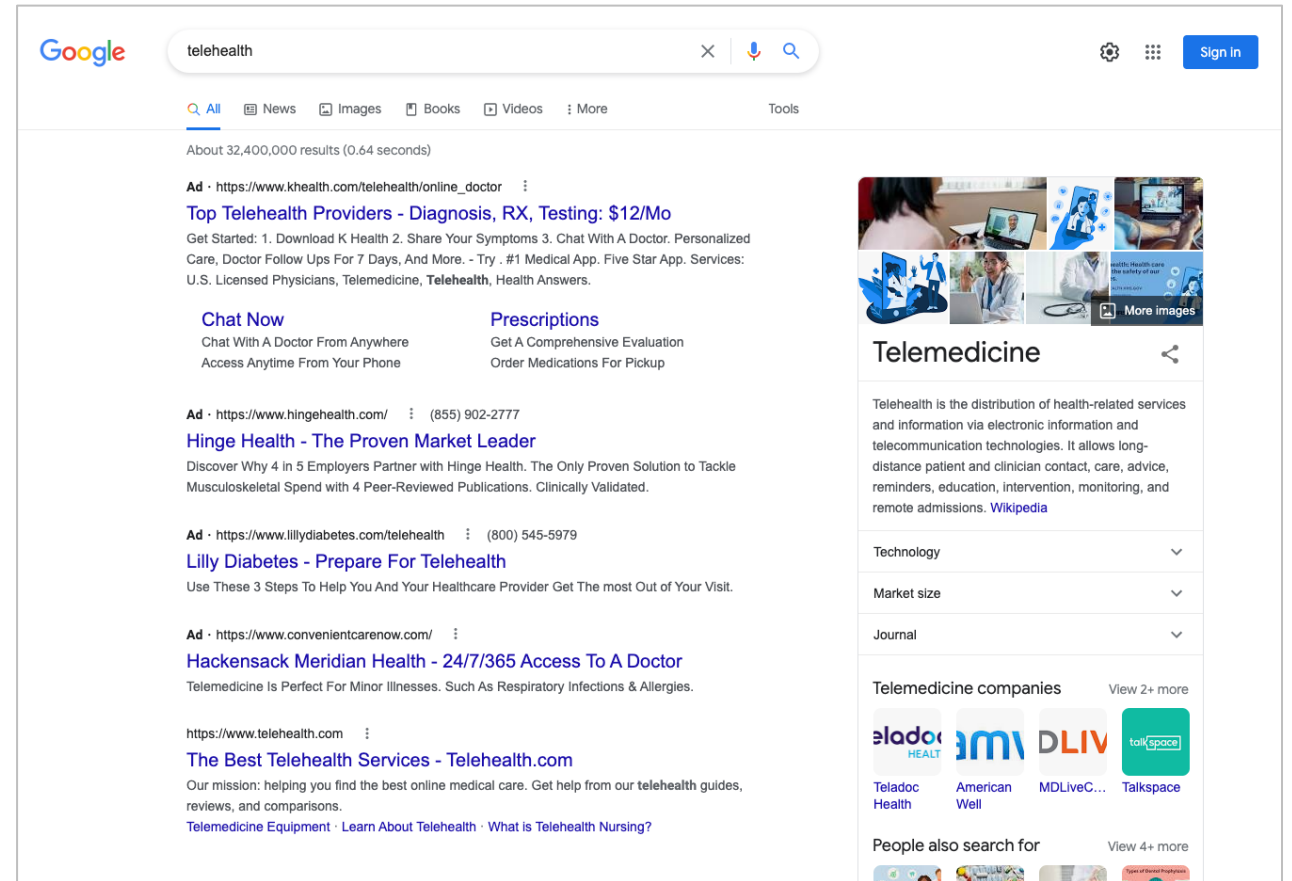
Make It Easy

Seeing the Doctor and Getting Treated

The Acceleration of Virtual Care

649%

increase in searches for “telehealth”
from Jan 2020 to Jan 2021



Source: SEMRush Reporting

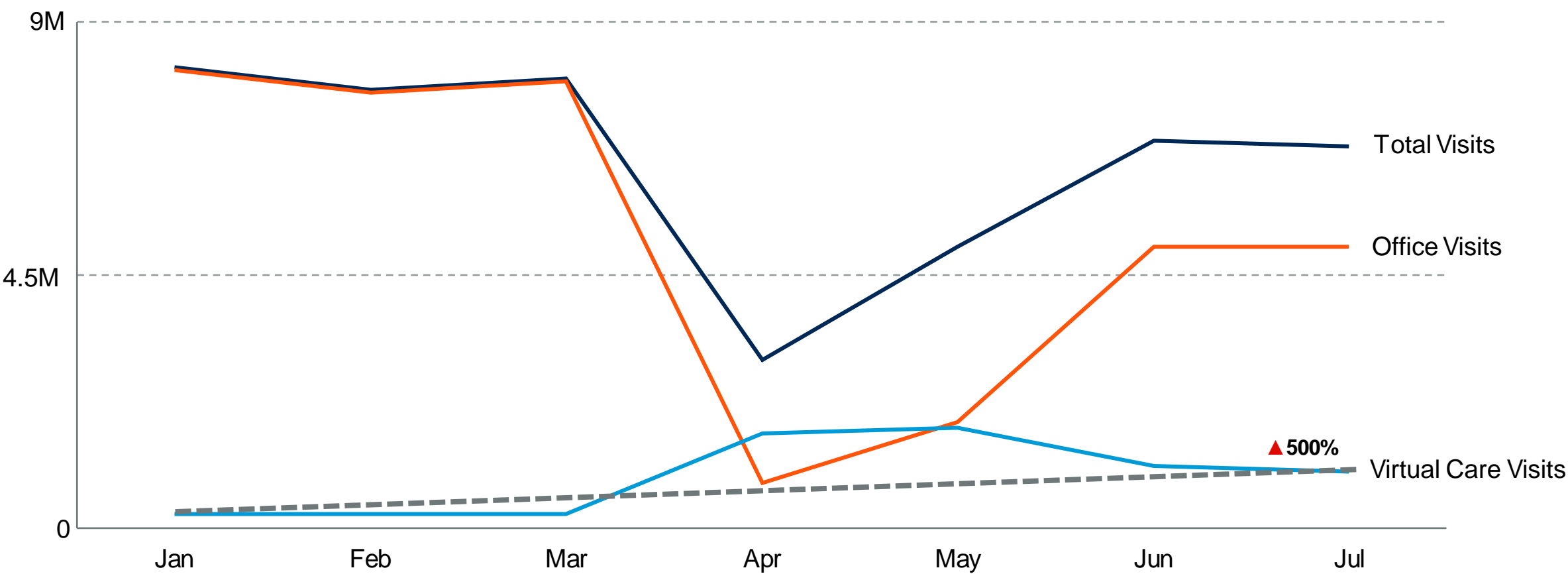
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Hybrid: The New Normal

1H20 US Ambulatory Visits (millions)

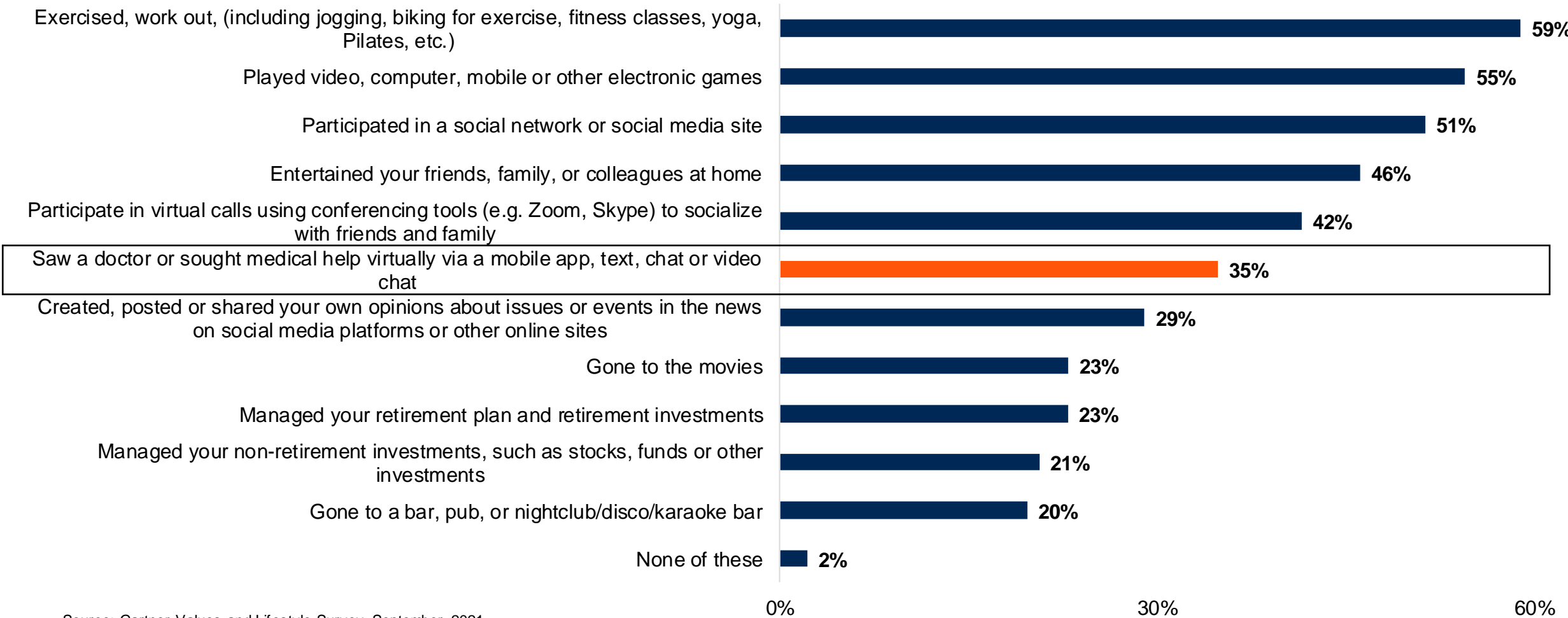


Source: [EPIC](#)

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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

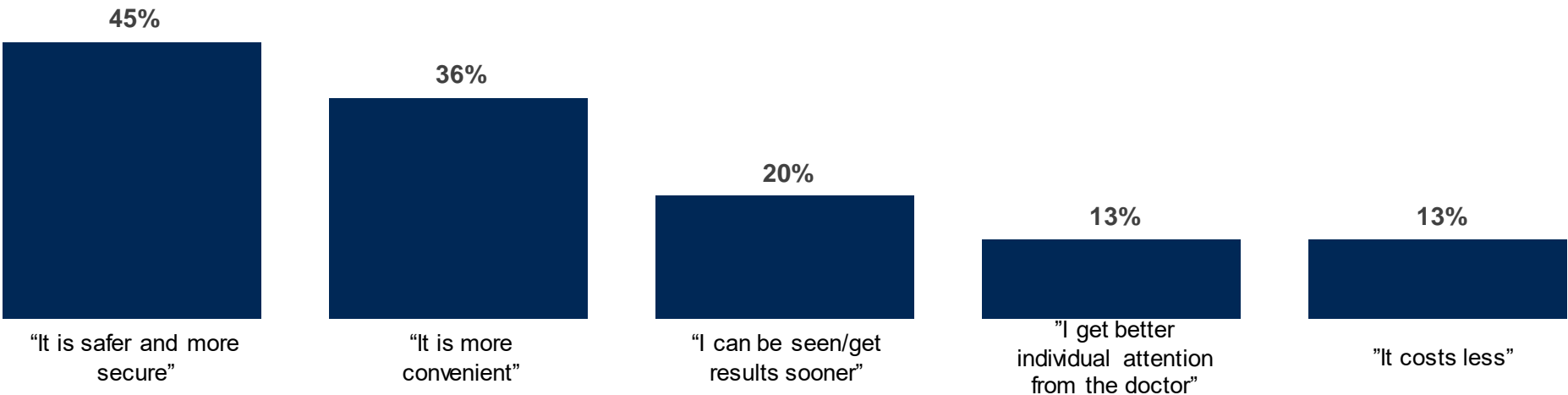


Source: Gartner Values and Lifestyle Survey, September 2021

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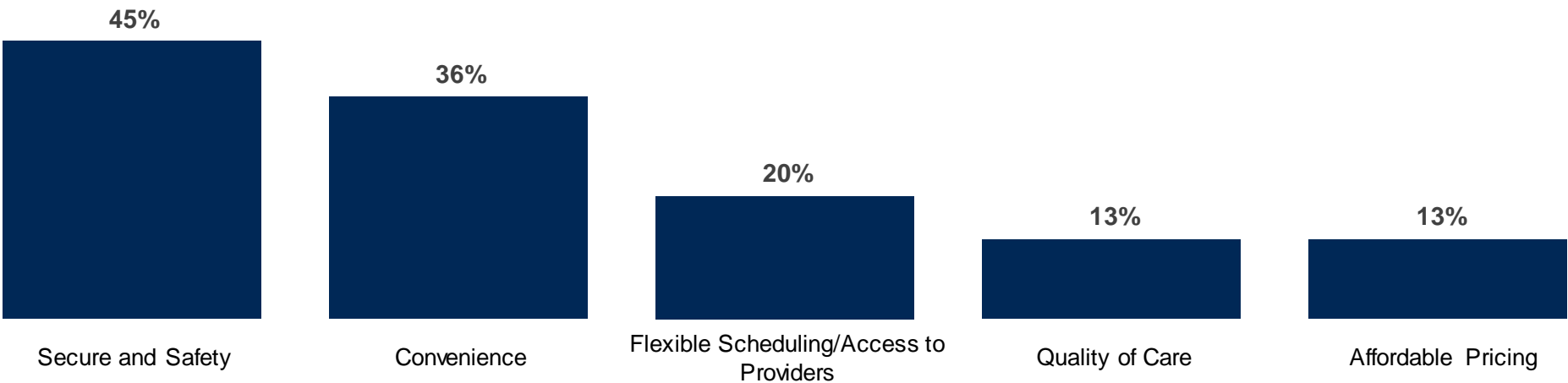
Telehealth Education Should Align to Patient Values

Share of Consumers Citing Given Criteria as Primary Reason for Using a Virtual Doctor or Diagnosis Service
May 2020



Source: Gartner Consumer Pandemic Attitudes and Behaviors Survey; Gartner analysis

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



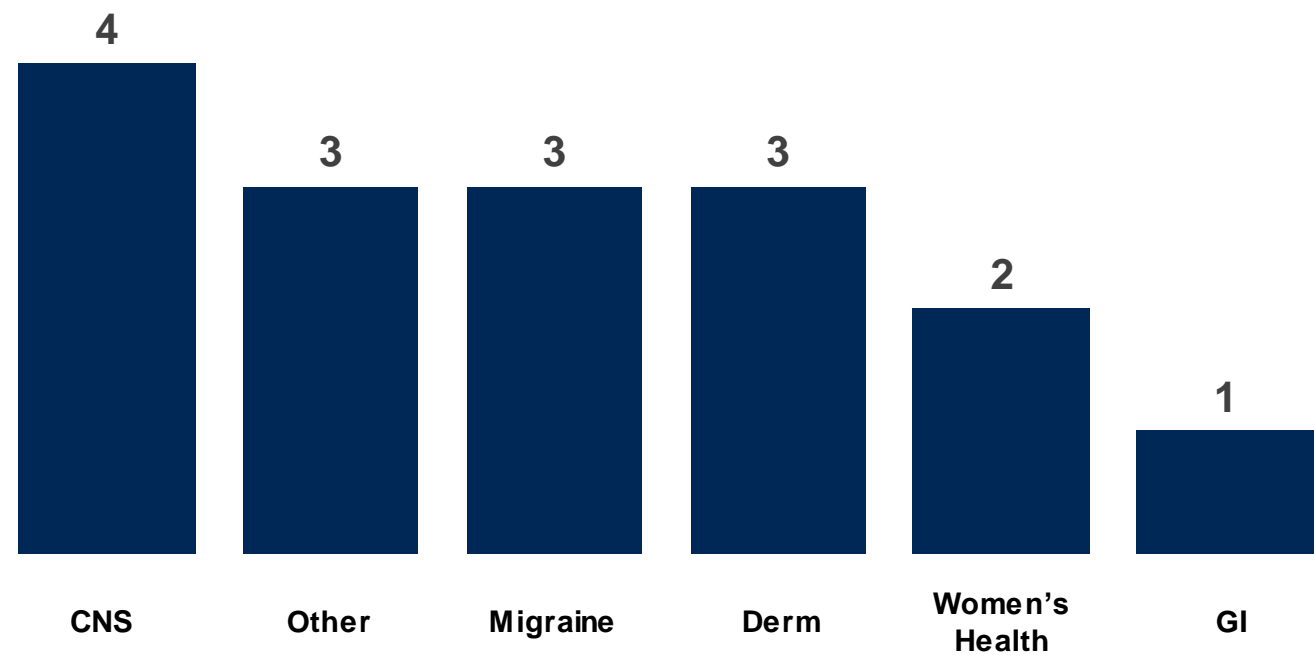
Source: Gartner Digital IQ Index Hospitals and Health Systems 2021, n = 52 Health and Hospital Systems with Telehealth Pages

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

FOR THE ACUTE TREATMENT OF MIGRAINE AND THE PREVENTIVE TREATMENT OF EPISODIC MIGRAINE IN ADULTS. Important Safety Information Prescribing Information Patient Information For HCP

Nurtec ODT (rimegepant) orally disintegrating tablets 75 mg \$0 copay offer Share your story using: #NurtecODT

Home About Nurtec ODT Getting Nurtec ODT Patient Stories & Reviews About Migraine

Now you can get Nurtec ODT through telemedicine!

We've partnered with Cove, a telemedicine company focused entirely on migraine. Cove can connect you with an independent, licensed healthcare provider who will manage your migraine care and help you get Nurtec ODT if appropriate. Eligible patients with commercial insurance can still use their \$0 copay card with Cove. See full [Terms and Conditions](#)

Here's how it works

- 1 Sign up at [withcove.com](#)
- 2 Complete an online consultation with an independent, licensed physician. A nominal fee is associated with this service
- 3 If a prescription is ordered, pick it up from your pharmacy or see if they can deliver it to your home

Cove is available to most people in the US (roughly 90% of the population). As telemedicine regulations vary from state to state, visit [withcove.com](#) to see if Cove operates in your state.

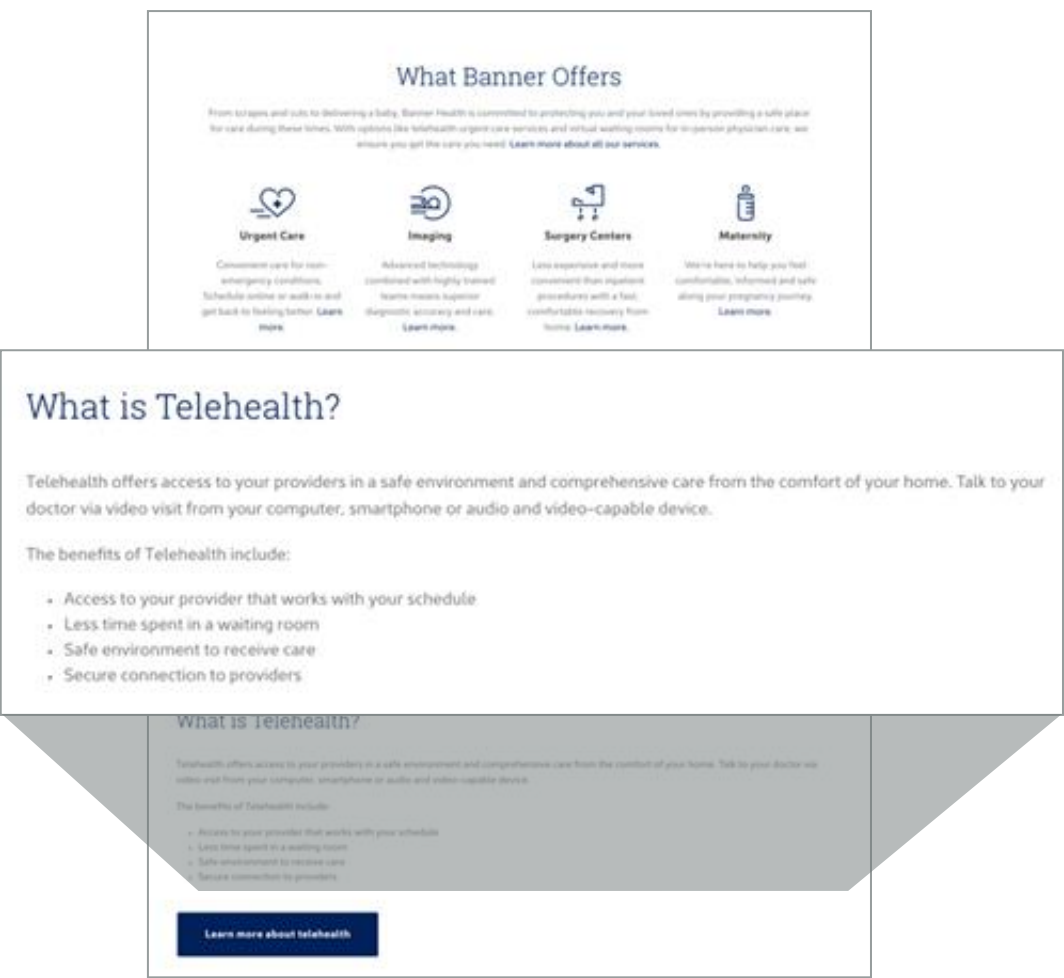
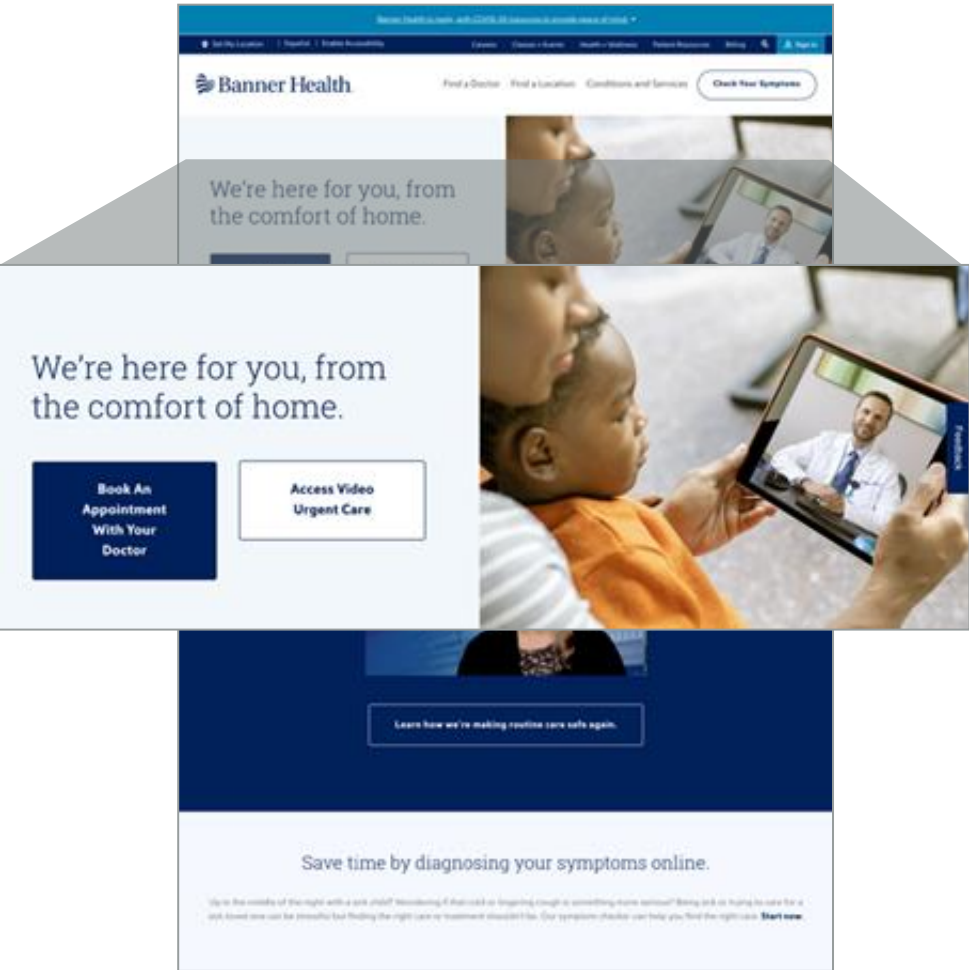
[get started](#)

“ I signed up for the Cove network and received a prescription for Nurtec ODT by my Cove doctor. Cove also helped me fill out prior authorization forms. **”**

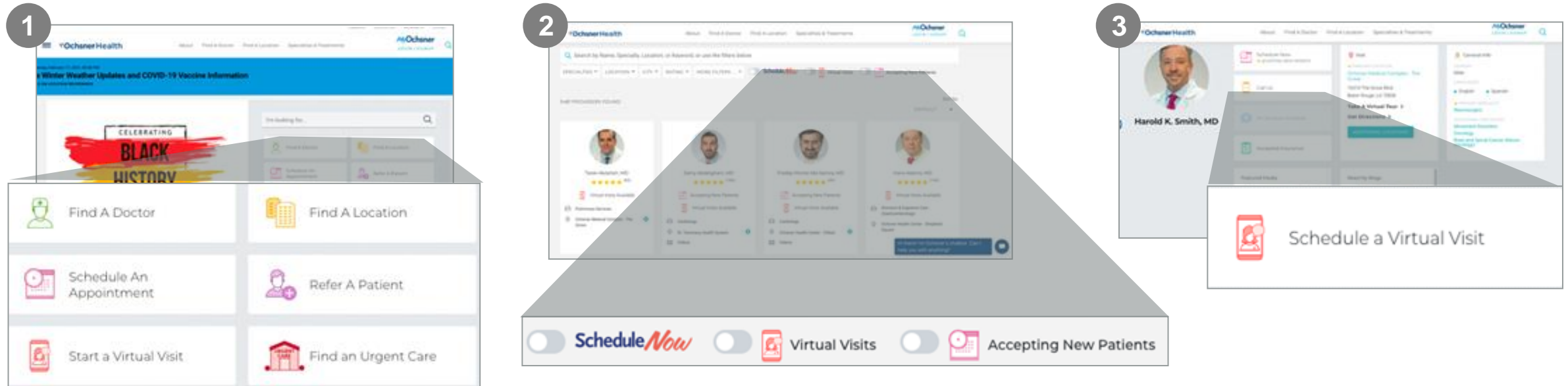
Evan B Actual Nurtec ODT Patient

IMPORTANT SAFETY INFORMATION
Do not take Nurtec ODT if you are allergic to Nurtec ODT (rimegepant) or any of its ingredients. Before you take Nurtec ODT, tell your healthcare provider (HCP) about all your medical conditions,

Banner Health Makes the Value Proposition Clear



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

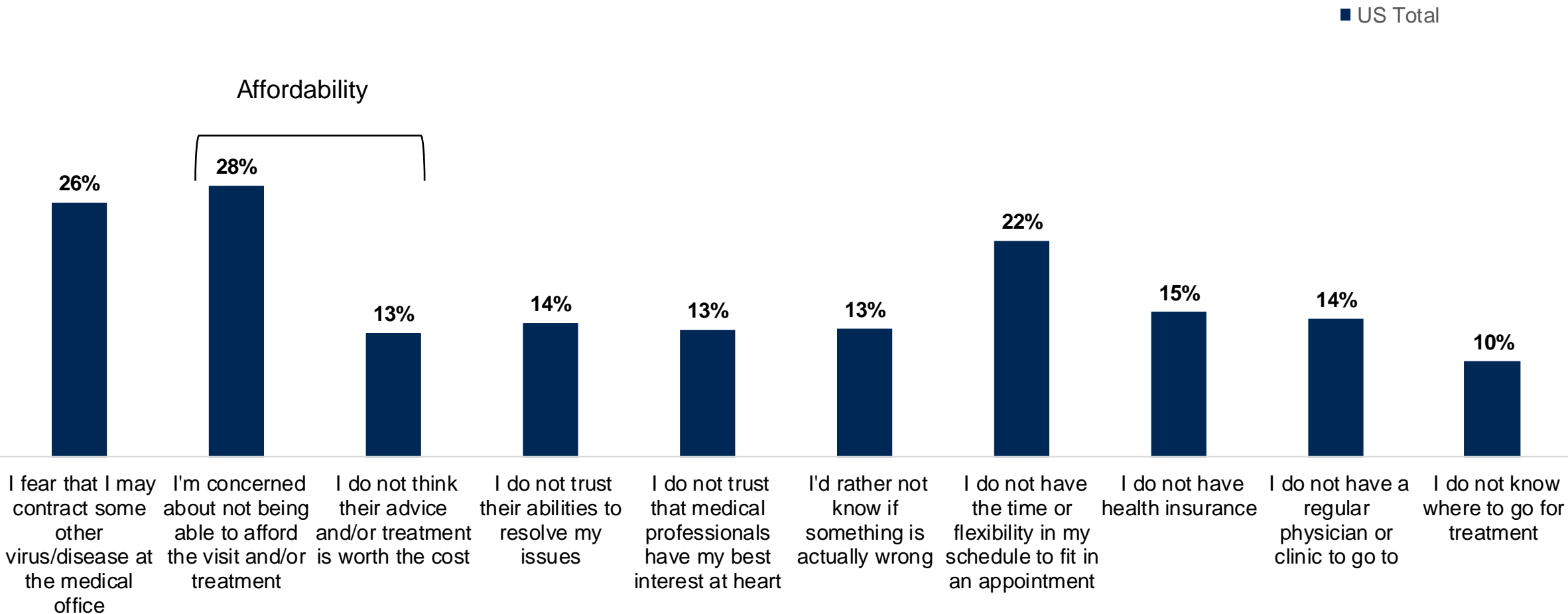


Access & Convenience



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?



Source: Gartner Values and Lifestyle Survey, September 2021

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.

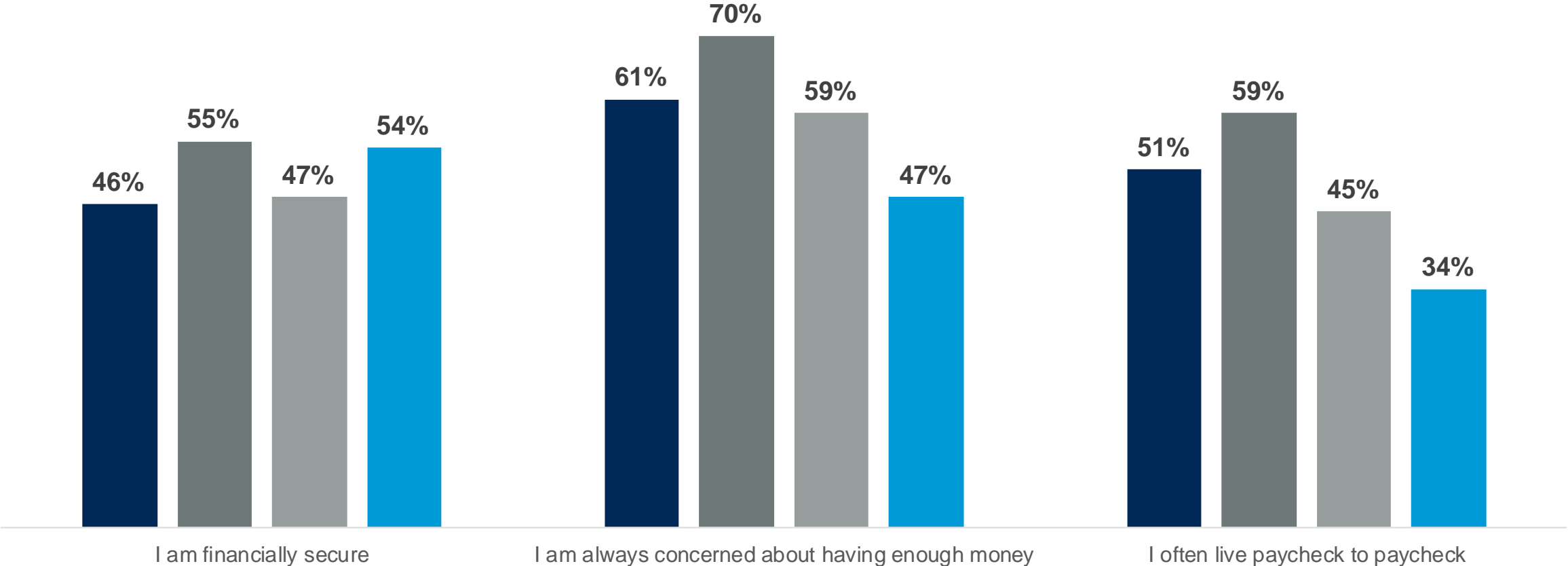
Hospital price lists were supposed to improve transparency—they haven't

BY MEGAN LEONHARDT

October 7, 2021 4:00 PM CDT

Financial Anxiety is Prevalent for Americans

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



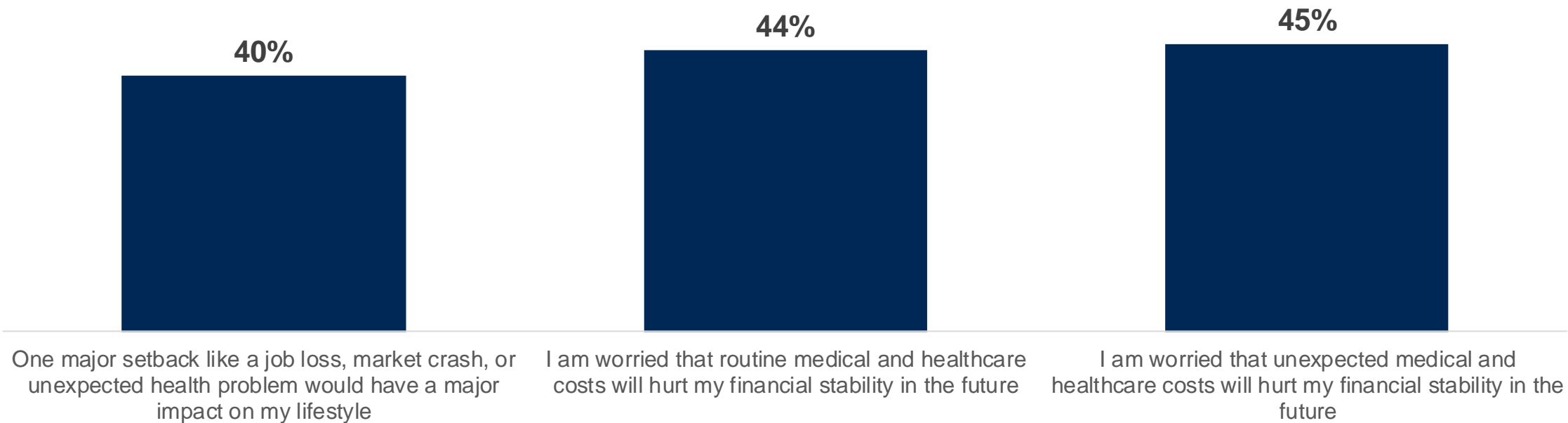
Source: Gartner Values and Lifestyle Survey, September 2021

■ Gen Z ■ Millennials ■ Gen X ■ Boomers

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Pervasive Financial Anxiety and Insecurity Linked to Perceptions about Healthcare Costs

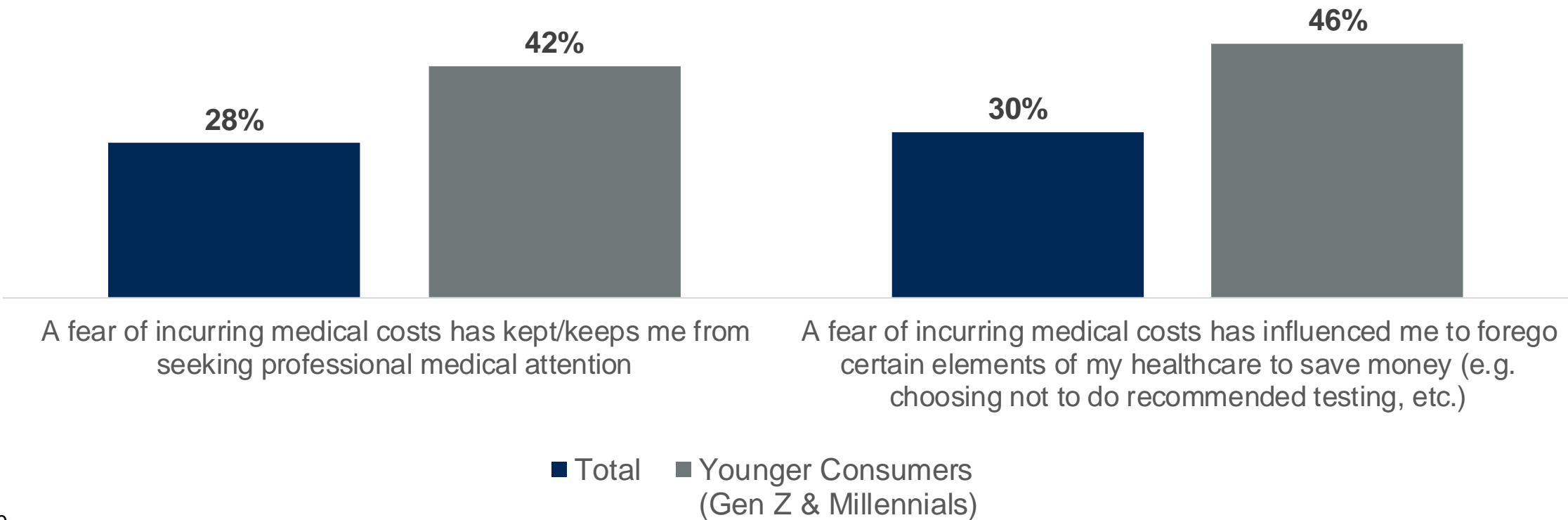
Percentage of surveyed consumers who agree with each statement:



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

Fear of Medical Costs Leads Consumers to Avoid Seeking Care

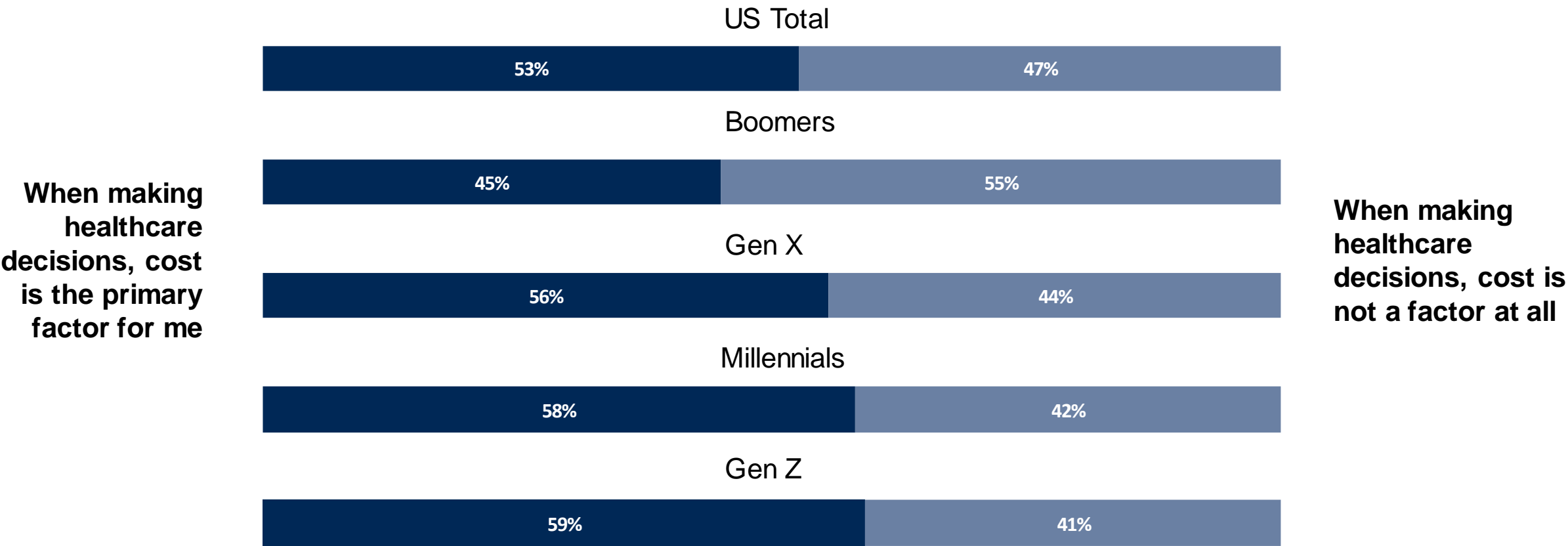
Percentage of surveyed consumers who agree with each statement:



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

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

Percentage of Consumers who Agree with Either Statement, By Generation

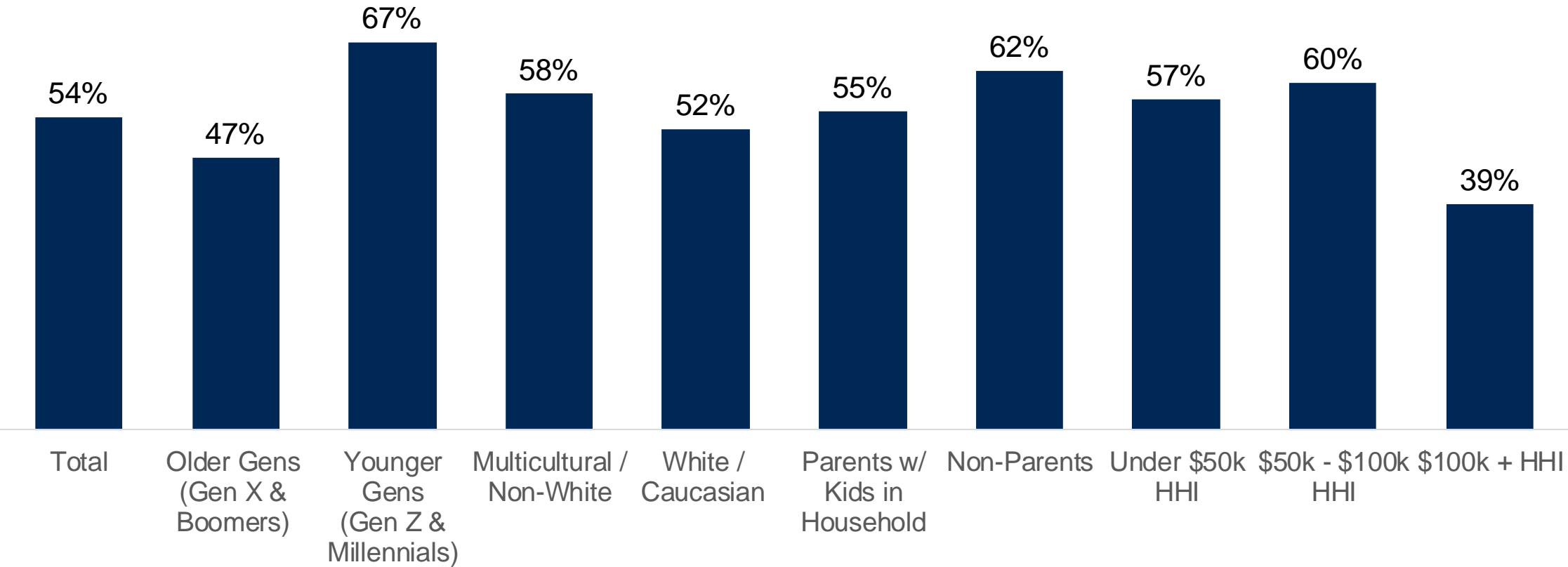


Source: Gartner Values and Lifestyle Survey, September 2021

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

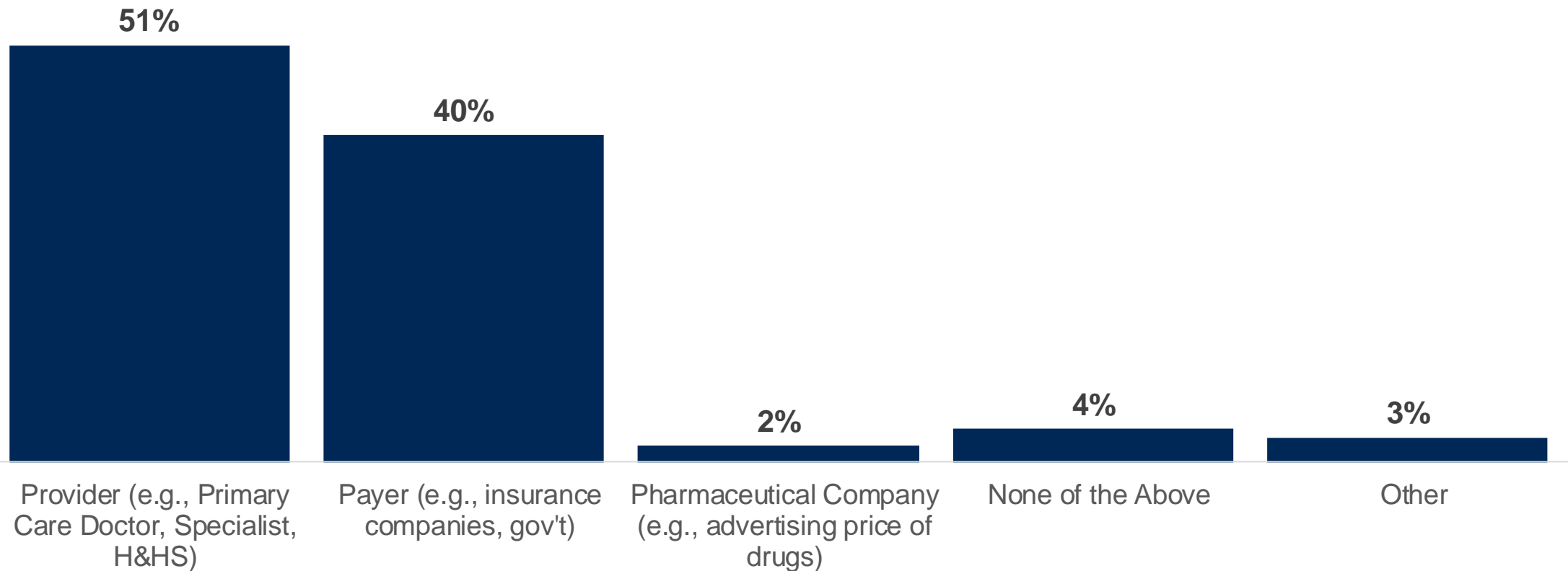
Percentage of surveyed consumers who agree with the statement: I would be more likely to seek out medical treatment if I knew the costs upfront



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

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)



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**

Brand Example

Savings & Support





Copay Cards

*Eligible patients pay as little as \$10

[Terms and Conditions apply](#)

Download Copay Cards →

Cost and Coverage

Favorable access on many plans nationwide and is available at the lowest branded copay for many commercial and Medicare patients.

View eligibility →

Brand Example



★ 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

+ Comparison

1.80

vs. **2.20**

Represents hip/knee replacement

Source: CMS Care Compare

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

Ask your questions



The screenshot shows a web interface for asking questions. At the top, there are four tabs: 'Ask a question', 'Attachments', 'Rate this', and 'Details'. The 'Ask a question' tab is highlighted with an orange border and an orange arrow points to it from the left. Below the tabs, the text 'Ask a question' is displayed. Underneath is a large text input area with the placeholder text 'Type your question here...'. At the bottom right of the input area, there is a 'Send Question' button, which is also highlighted with an orange border and an orange arrow points to it from the left.

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Coming Soon

A must-attend gathering offering CMOs and senior marketing leaders an expanded agenda of research, advice and shared learning. Discover an essential view into the technologies and trends that are shaping modern marketing strategies.

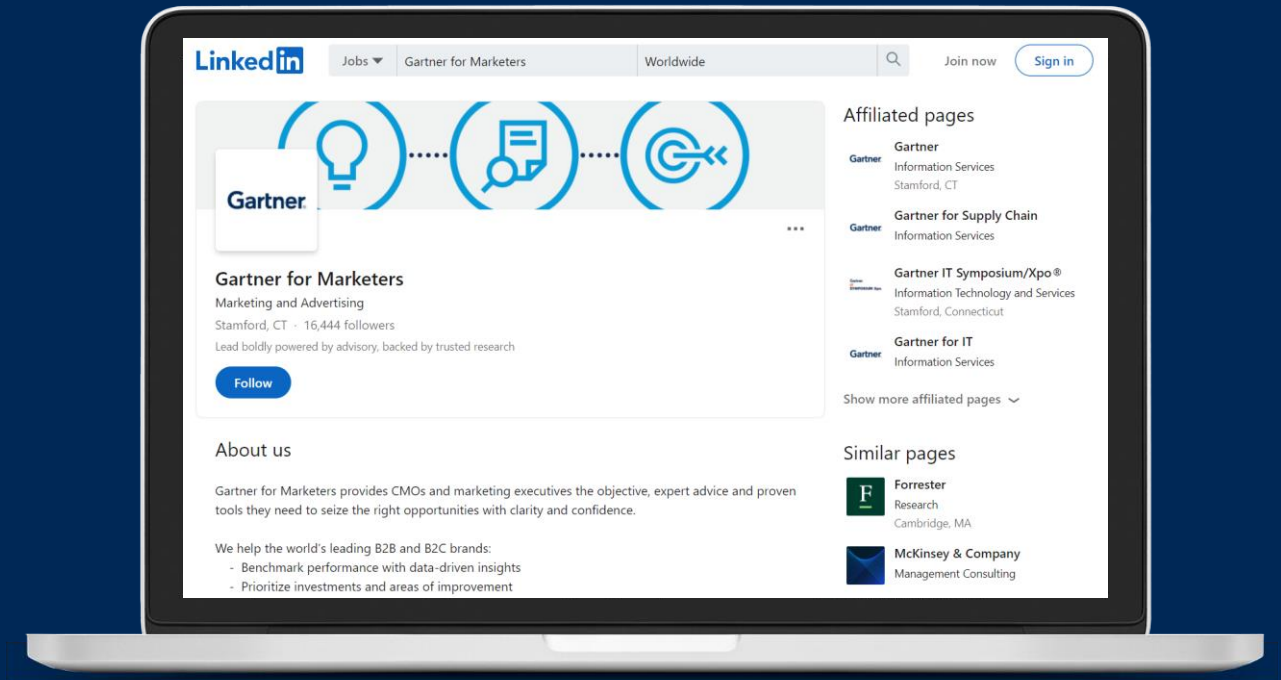


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