


2022 HEALTHCARE PERSPECTIVES ON CONSUMER ENGAGEMENT

Focus on Healthcare Providers
and Health Plans in the U.S.
September 2022

- 4 Overall experience**
- 5 Engagement**
- 7 Personalization**
- 8 Proactive outreach**
- 9 Switching a healthcare plan or provider**
- 10 Choosing a healthcare plan or provider**
- 11 Healthcare communication**

This survey was conducted via Dynata Research in September 2022 and targeted 1,000 U.S.-based consumers over 18 years of age. For complete survey methodology, email laura.ackerman@redpointglobal.com.

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OVERVIEW

While industry conversations around the future of care continue, we see healthcare consumerism increasing its influence in shaping the industry. As we look to deepening concerns in 2023 about managing individual and population health, we expect detailed discussions around what the future of healthcare will look like.

To understand consumer attitudes towards healthcare experience via providers and insurance plans, Redpoint Global Inc. conducted a survey with Dynata Research in September 2022 including 1,000 U.S.-based consumers over 18 years of age.

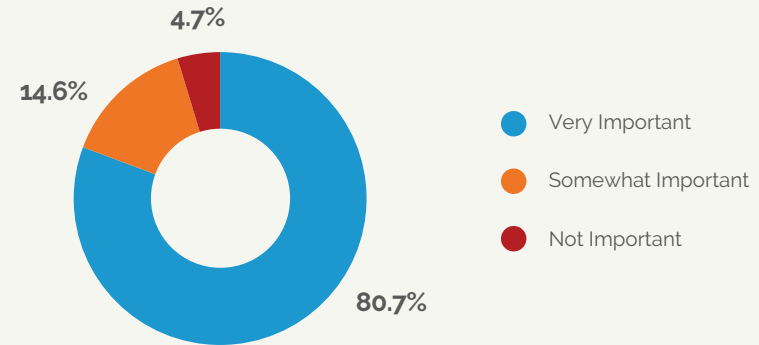
The 2022 Healthcare Perspectives on Consumer Engagement report shares insights from the survey to help guide healthcare organizations in adapting to the factors that impact where consumers turn for care. Since a key component for patients' well-being and satisfaction is their level of involvement in the healthcare process, we have particularly explored the impact of engagement and personalization.

OVERALL EXPERIENCE

81% of healthcare consumers say their overall experience as patients and members is very important.

Better health outcomes, lower costs and improved consumer satisfaction are certainly what we are all aiming for, with customer experience potentially having a significant impact on all of these areas. In many cases, patient experience affects treatment adherence and subsequently health outcomes. Ultimately, healthcare organizations that put their customers in the center are the ones achieving better health and business outcomes.

Figure 1. How important good customer experience is to you when interacting with a healthcare provider or health plan?



Consumers have increasingly high expectations for their overall healthcare experience. While most of the respondents currently seem to be satisfied or somewhat satisfied, the bar continues to rise. It's important to explore what the gaps are we still need to fill and how that will evolve.

Figure 2. How satisfied are you with your patient experience when it comes to your healthcare provider?

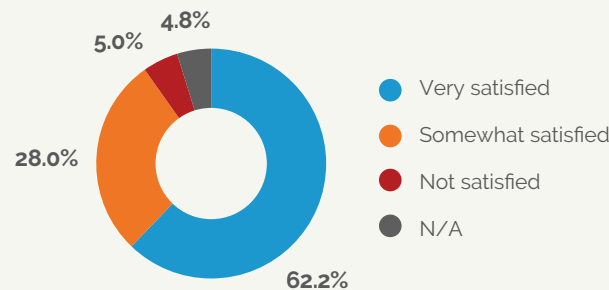
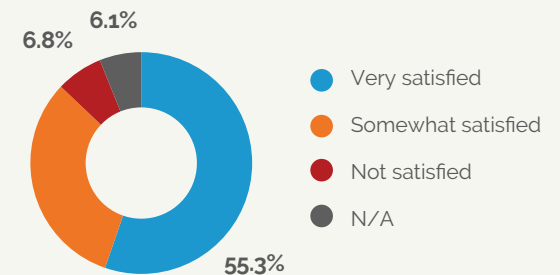
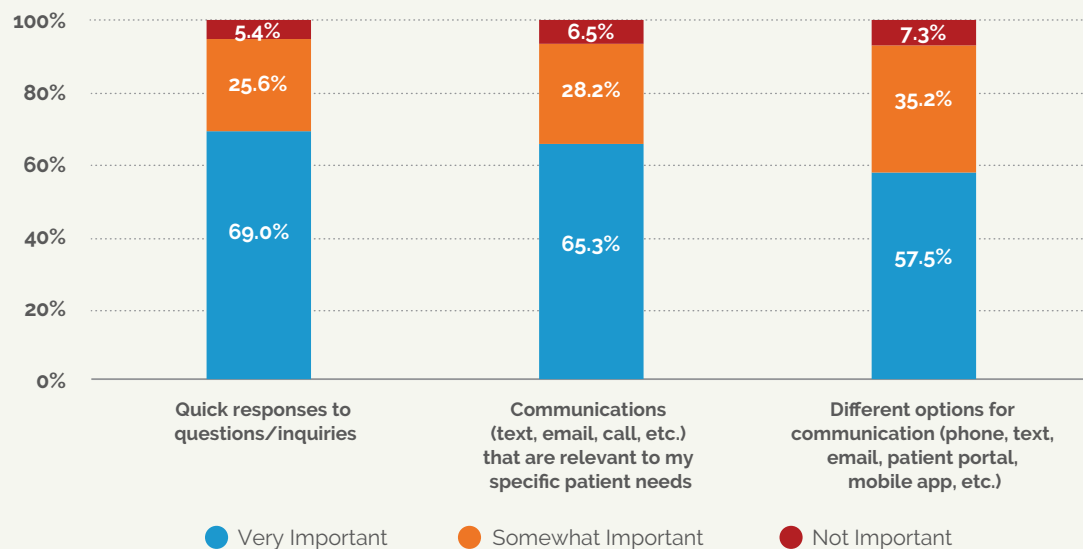


Figure 3. How satisfied are you with your member experience when it comes to your healthcare insurance company?



From a business perspective, knowing where patients are in their healthcare journey not only improves engagement but it also helps organizations optimize resources. It allows them to segment and engage chronic and high value patients and prioritize them in outreach and scheduling, versus patient groups which can afford to see the doctors less frequently, resulting in a more effective use of doctors' time and higher impact on overall health outcomes.

Figure 4. How important the following elements are to you when communicating with a healthcare provider or health plan?



In terms of engagement, 65% of patients say it is very important to receive communications relevant to their specific needs, almost as important as receiving response to their inquiries in a timely manner.

The survey shows that half of the healthcare customers are very satisfied with the relevance, speed and communication options that healthcare providers and health plans provide. The other half of customers are saying the experience is falling short in some way. This 50% represents a large gap, particularly with up to 69% of customers that stating some of these aspects are 'very important'. Healthcare organizations are devoting tremendous effort to being responsive and relevant, especially considering the economic and workforce challenges they are facing. Nevertheless, to keep up with the shifts in consumerism, healthcare organizations need to continue to reevaluate and explore how to further improve customer satisfaction.

Figure 5. How satisfied are you with the following when it comes to communicating with your healthcare provider?

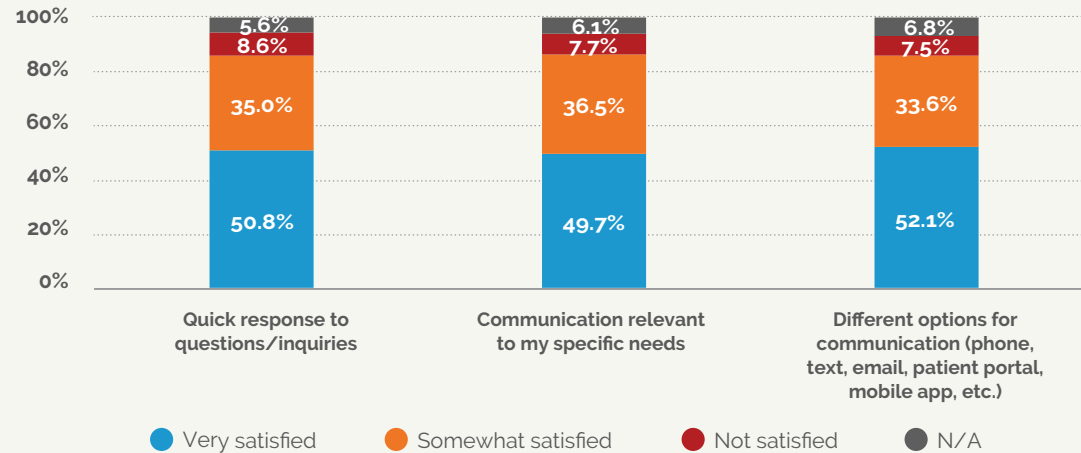
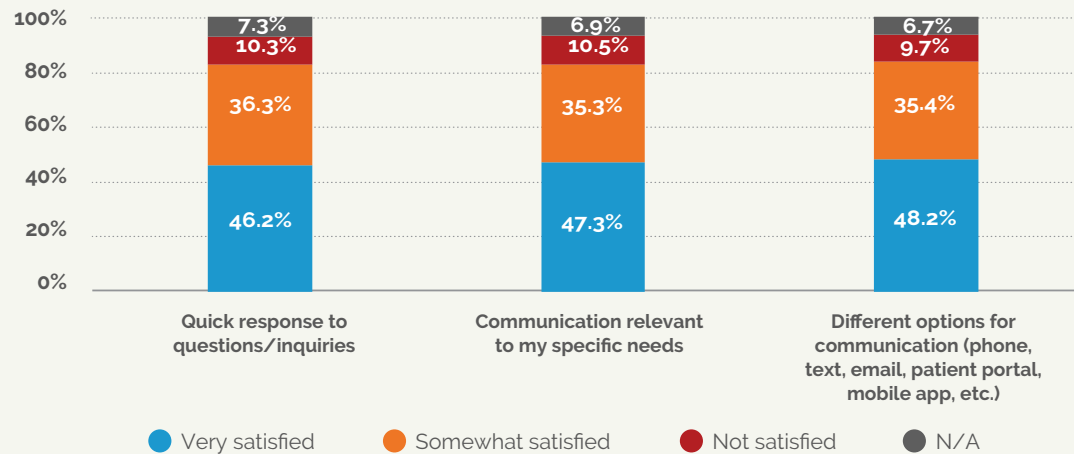
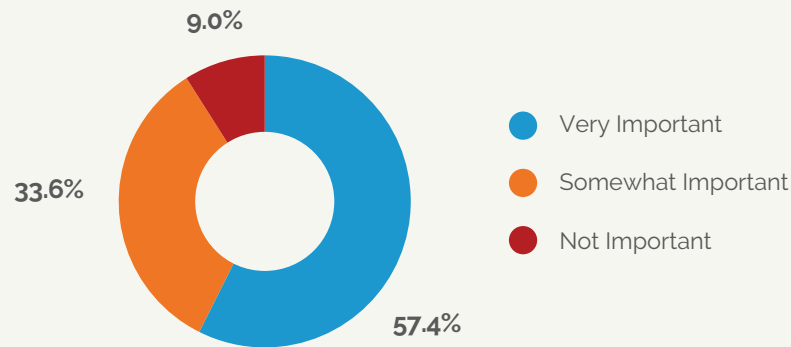


Figure 6. How satisfied are you with the following when it comes to communicating with your healthcare insurance company?



Personalization is a driving factor for Americans when it comes to their health plans and providers. Just over 57% say it is very important for them that the data they provide to healthcare organizations is used to improve their experience by personalizing the interactions, and another third of consumers find it somewhat important. These results reemphasize the need for healthcare organizations to take the conversations with patients to a personal level.

Figure 7. How important it is for you that the data you provide to your healthcare provider(s) or health plan is used to improve your experience by personalizing the interaction(s).



The desire for personalization is not limited to in-person communication however. More than 1/3 of healthcare consumers expect online communications to match their in-person experiences in terms of relevance, consistency and outcomes. This shows the importance for healthcare organizations to collect, process and use their data to construct a unified customer profile across all systems and interaction touchpoints. It is also the foundation of being able to personalize the patient experience.



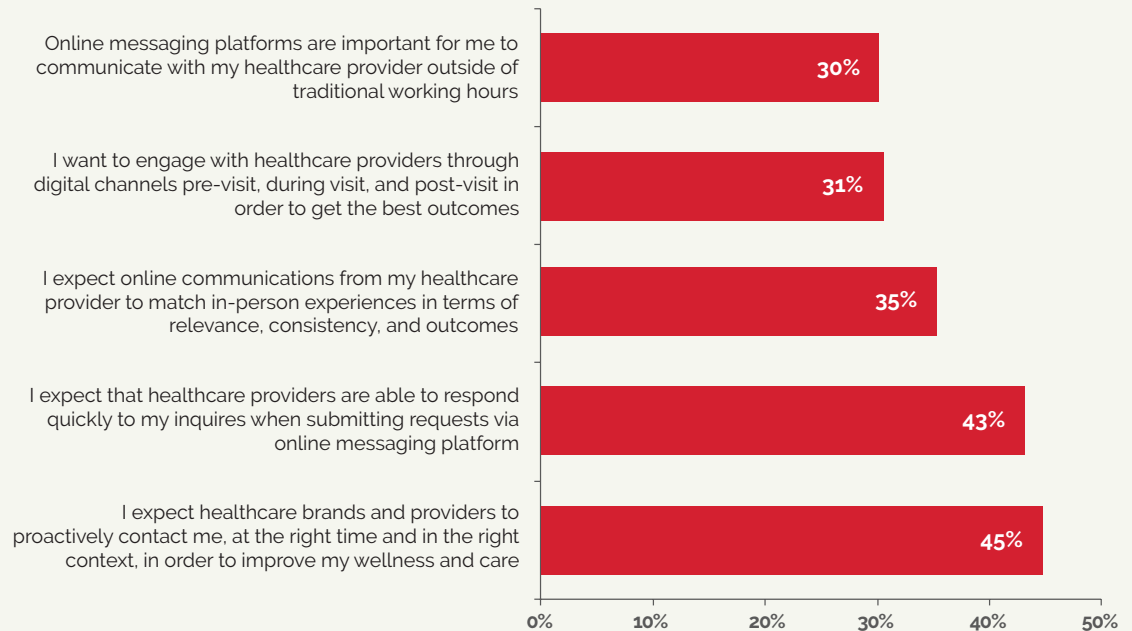
91% of healthcare consumers rate personalization as very important or somewhat important.

PROACTIVE OUTREACH

45% of patients expect healthcare brands and providers to proactively contact them, at the right time and in the right context.

When we have an issue, we usually find a way to connect with our healthcare provider, but that doesn't seem to be enough anymore. To improve health outcomes and overall wellness, 45% of patients expect healthcare brands and providers to proactively contact them, at the right time and in the right context.

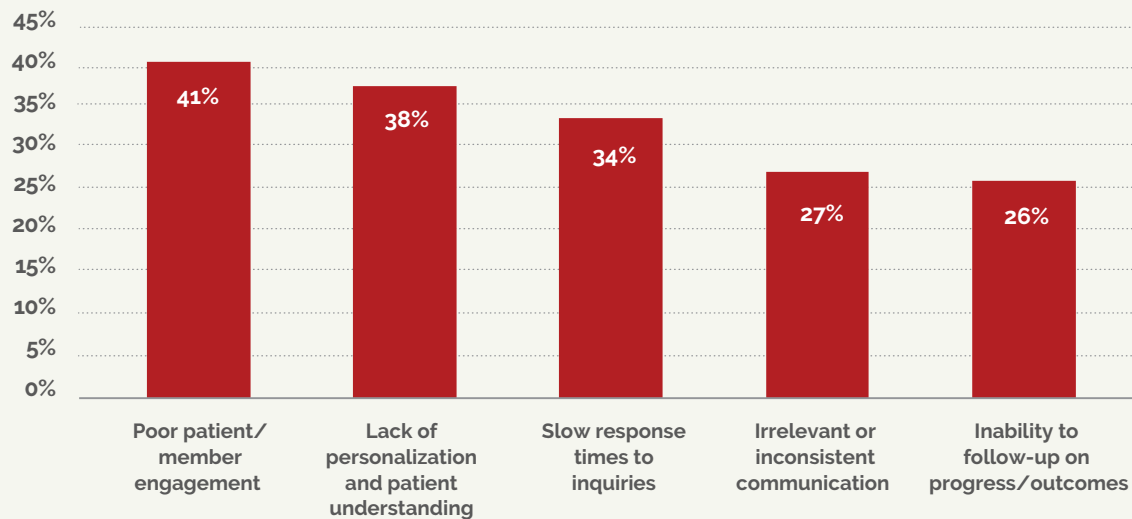
Figure 8. Which of the following statements do you agree with?



31% of the surveyed group believes that to achieve the best outcomes healthcare providers should engage them through digital channels pre-visit, during visit and post-visit. So, in addition to proactive engagement, there also needs to be an adequate follow-up and the role of digital channels is key.

In the same way healthcare customers are choosing a company to guide them through the care process, they are also willing to replace it if they are not satisfied with the frequency and relevancy of consumer engagement being offered.

Figure 9. Which of these can influence your decision to switch your healthcare provider or health insurance plan?



At the end, personalized and timely patient engagement is not just nice-to-have, it is now imperative for healthcare organizations that want to build long-lasting relationships and truly want to help their consumers improve health outcomes and overall well-being.

SWITCHING A HEALTHCARE PLAN OR PROVIDER

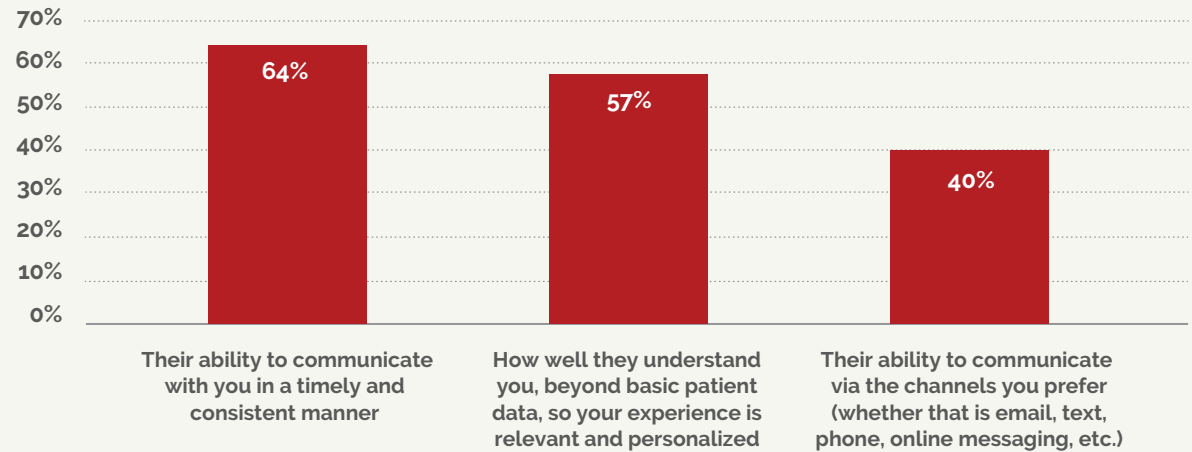
Not only are engagement and personalization important to healthcare consumers but 41% of them would consider switching their healthcare plan or provider due to poor customer engagement and 38% would switch due to lack of personalization or patient understanding.

CHOOSING A HEALTHCARE PLAN OR PROVIDER

64% of people would choose a healthcare provider or insurer based on their ability to communicate in a timely and consistent manner.

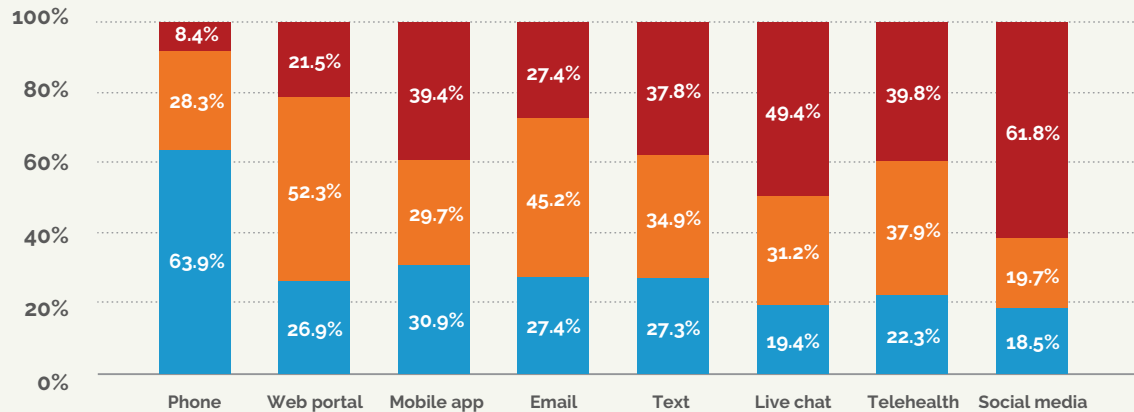
Almost as many consumers would base their decision on how well healthcare organizations understand them beyond basic patient data. It is not a surprise that healthcare consumers are starting to behave as they would when evaluating any other product or service. They know what they want and are willing to look for the organization that can deliver on it.

Figure 10. Would you choose a healthcare provider or insurer based on the following?



This brings the digital front door as the second most important channel for patient and member engagement. However, there is still a lot of room for improvement as more than half of the respondents use a web portal only once or sometimes. Also, considering that patients often use a mix of channels, one could argue that the key to good customer engagement lays in designing a true omnichannel experience.

Figure 11. How often do you use the below method of communication when dealing with healthcare providers and plans?



Close to 80% of respondents use a web portal to communicate with healthcare providers and plans, even though phone is still the most frequently used means of healthcare communication.



Like every other industry, healthcare consumer experience depends heavily on how healthcare organizations engage with their patients and members, in-person and digitally. A big part of creating an engaging experience depends on what information is known about the consumer and the insights extracted from it in order to show consumers understanding and care beyond the basic patient data. Easier said than done. Healthcare organizations are sitting on mountains of data that is still severely siloed and underutilized. Consistent and personalized consumer engagement is now a key determinant for a win-win relationship where patient health outcomes improve and business goals are being met.



US Headquarters | Wellesley, MA +1 781 725 0250
EMEA Headquarters | London, UK +44 (0)20 3948 8170
www.redpointglobal.com

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