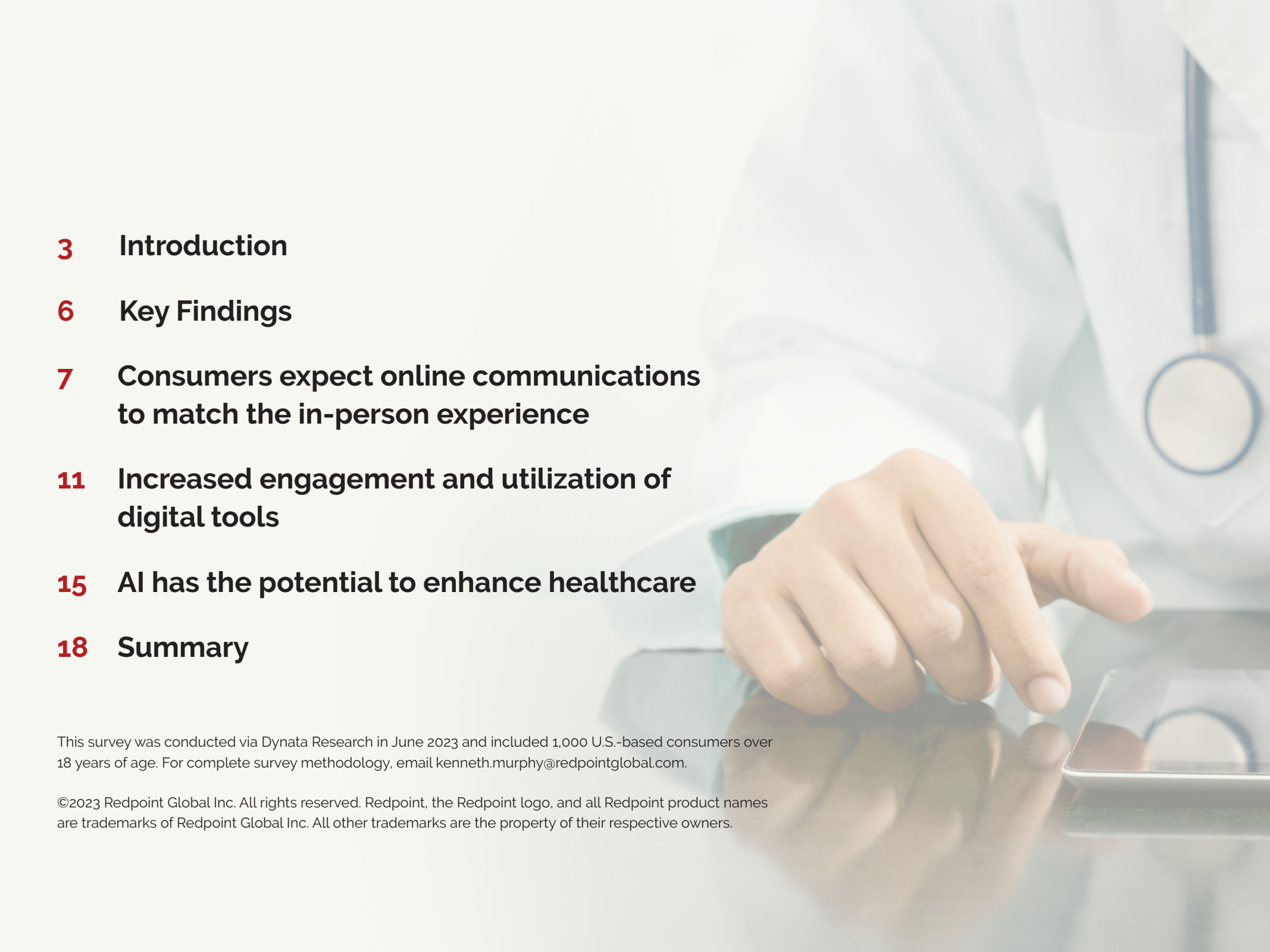


HEALTHCARE CONSUMER PERSPECTIVES ON DIGITAL ENGAGEMENT AND AI

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



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This survey was conducted via Dynata Research in June 2023 and included 1,000 U.S.-based consumers over 18 years of age. For complete survey methodology, email kenneth.murphy@redpointglobal.com.

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INTRODUCTION

We used to think of healthcare as an antiquated slow-moving system. However, after decades of resistance to change, the industry is now experiencing a seismic shift driven by an amalgam of factors, including technological advancements, evolving patient expectations, cost-efficiency demands and increasing competitive pressure. Together, these forces are compelling healthcare leaders to rethink their digital strategies.

As healthcare leaders seek to futureproof their organizations, it's imperative to gain a better understanding of how healthcare consumers are responding to these transformational forces and how they perceive the evolving landscape of digital engagement and artificial intelligence (AI) in healthcare.

Factors Driving Change in Healthcare



Technological advancements

The proliferation of advanced technologies, such as AI, telemedicine, wearables and data analytics has catalyzed a paradigm shift in healthcare delivery and engagement.



Evolving patient expectations

Patients expect seamless and personalized experiences, akin to their interactions in other industries, compelling healthcare organizations to provide better access, engagement and convenience of care.



Cost-efficiency imperative

Escalating healthcare costs have forced providers and payers to seek optimization and automation of processes while maintaining quality of care, ushering in a wave of digital tools and AI-powered systems.



Competitive pressure

Major retailers and tech giants are disrupting the healthcare landscape with customer-centric models and data-driven solutions, seeking to streamline services and provide more accessible healthcare options.

The 2023 Healthcare Consumer Perspectives on Digital Engagement and AI

report aims to facilitate healthcare leaders in navigating the turbulent healthcare environment. The report highlights findings of a survey commissioned by Redpoint Global that explores consumers' attitudes toward digital patient engagement and AI's integration into healthcare within the context of healthcare providers and health plans. The survey included 1,000 U.S.-based consumers over 18 years of age and was conducted via Dynata Research in June 2023.

Key Findings

62%

of consumers expect online communications to match the in-person experiences they receive in terms of relevance, consistency and outcomes.

Most patients not only seek seamless and convenient online interactions but also demand that these digital experiences closely mimic the quality of face-to-face interactions. Healthcare consumers name “complex or confusing experiences” as the No. 1 reason they would consider changing their healthcare provider.

57%

of healthcare consumers report an increased utilization of digital tools to engage with healthcare providers, health plans and other healthcare organizations over the past year.

The increase in digital tool usage signifies that patients are embracing the convenience, accessibility and efficiency that technology offers in managing their healthcare needs. Half of the respondents believe that leveraging digital tools for healthcare, such as prescription reminders and personalized health recommendations, could enhance their self-care efforts.

>80%

of consumers use a web/patient portal most or at least some of the time to communicate with healthcare providers and health plans.

Consumers responded positively to proactive communications encompassing wellness tips, seasonal health recommendations and preventive screening reminders. While in-person and traditional channels of communication still hold high value with patients, digital channels are progressively making their way to the top of the list for their speed and convenience.

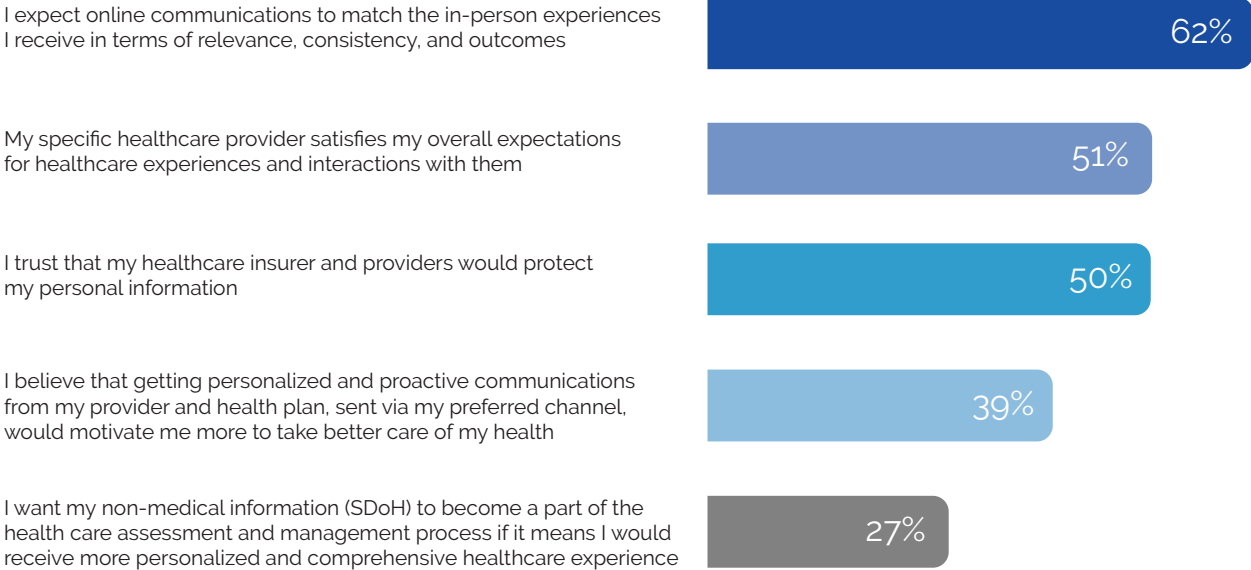
68%

of consumers believe AI has the potential to enhance healthcare, specifically when it comes to getting clear and quick insights on health conditions, wellness and driving overall better health outcomes, etc.

While many acknowledge AI's potential to revolutionize healthcare interactions, a significant portion remains cautious due to technology's current limitations. Addressing these concerns and ensuring that AI aligns with patient values and privacy expectations will be pivotal in fostering trust, driving adoption and ultimately realizing AI's transformative potential in healthcare.

Consumers expect online communications to match the in-person experience

Figure 1. Which of the following statements do you agree with regarding experiences with healthcare insurer and/or providers?



62% of consumers expect online communications to match the in-person experiences they receive in terms of relevance, consistency, and outcomes.

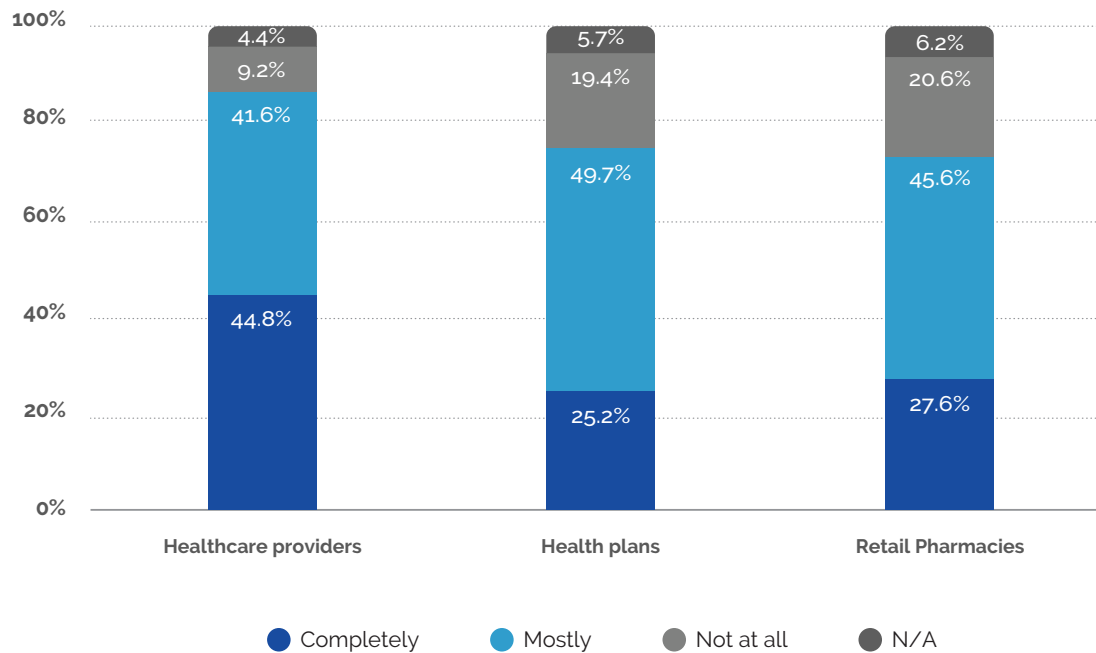
In an era defined by digital connectivity and personalized experiences, consumers expect their interactions with healthcare providers and health plans to be nothing short of seamless. The survey uncovered a compelling desire among respondents for their online communications to mirror the depth and quality of in-person experiences. Sixty-two percent of participants emphasized the importance of not only relevant but consistent and outcome-driven online communications. This indicates a fundamental shift in the perception of digital interactions from mere conveniences to essential components of the patient experience.

39% believe that getting personalized and proactive communications from their provider and health plan sent via their preferred channel (SMS, phone call, email) would motivate them to take better care of their health.

The survey brought to light the potential of personalized and proactive communications as catalysts for positive behavior change. Almost 40% of respondents indicated that receiving personalized communications tailored to their preferred channels could serve as a motivating factor for actively managing their health. This accentuates the significant role that effective communication plays in driving patient engagement and compliance.



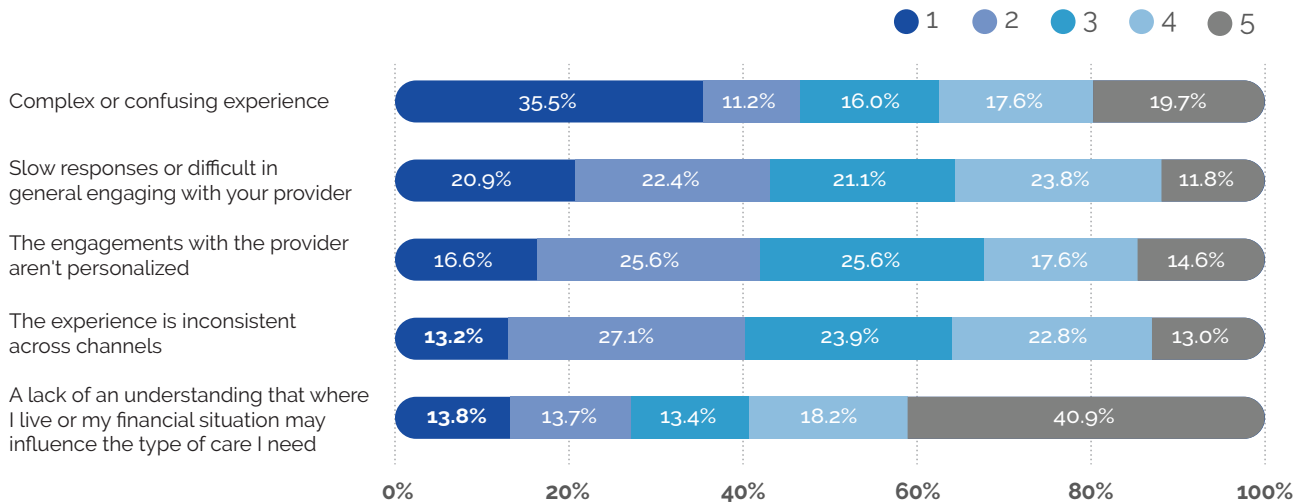
Figure 2. Besides messages about upcoming appointments and treatment options, do proactive communications you receive from the following healthcare organizations feel relevant to you (eg. wellness tips, seasonal health recommendations, reminders for preventive care)



Close to 45% of healthcare consumers think proactive communications they receive from providers, besides messages about upcoming appointments and treatment options, feel completely relevant, while for health plans and retail pharmacies they rate it as mostly relevant.

Effective communication, whether from healthcare providers, health insurance plans or retail pharmacies has long been acknowledged as the cornerstone of quality healthcare. Proactive communications including wellness tips, preventive screening reminders and seasonal health recommendations received favorable feedback from nearly half of the population which indicates an opportunity for healthcare organizations to leverage this appetite to enhance patient engagement further by delivering personalized messages that cater to individual healthcare needs and preferences.

Figure 3. How would you rank the following options in terms of what would make you consider changing your healthcare provider?



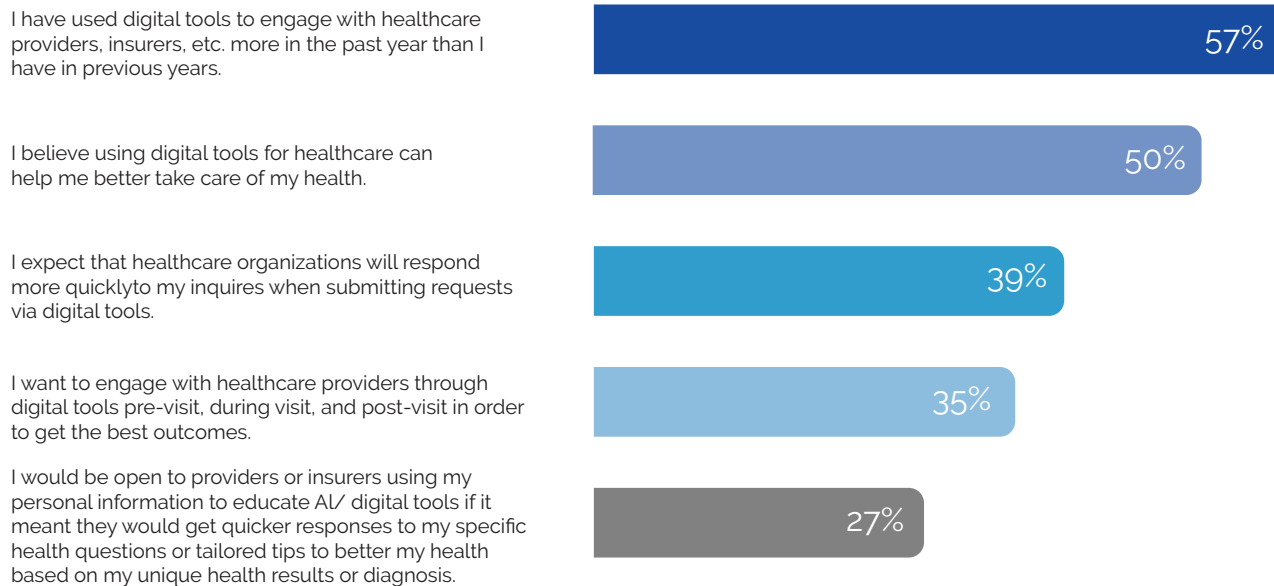
No. 1 reason consumers would consider changing their healthcare provider: “complex or confusing experiences” (e.g., digital tools being hard to understand or use).

Consumers identify “complex or confusing experiences” with digital tools as the primary reason they would contemplate changing their healthcare provider. Patients seek a uniform experience and personalized communication that address their specific healthcare needs and preferences, regardless of whether they interact with their healthcare provider through online portals, phone calls, emails or other channels. This highlights the significance of user-friendly interfaces, consistent omnichannel experiences and personalized engagements and emphasizes the role integrated systems play for patient satisfaction and retention.

Consumers identify “complex or confusing experiences” with digital tools as the primary reason they would contemplate changing their healthcare provider.

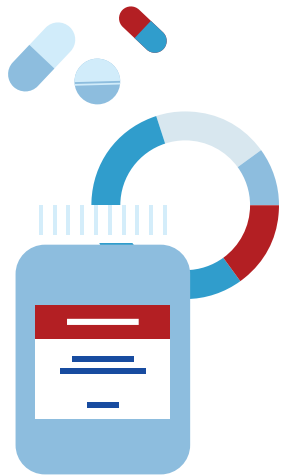
Increased engagement and utilization of digital tools

Figure 4. Which of the following statements do you agree with regarding the use of digital tools for healthcare (e.g., online portal, website, email, mobile app, etc.)?



57% of healthcare consumers have used digital tools to engage with healthcare providers and health plans more in the past year than in previous years.

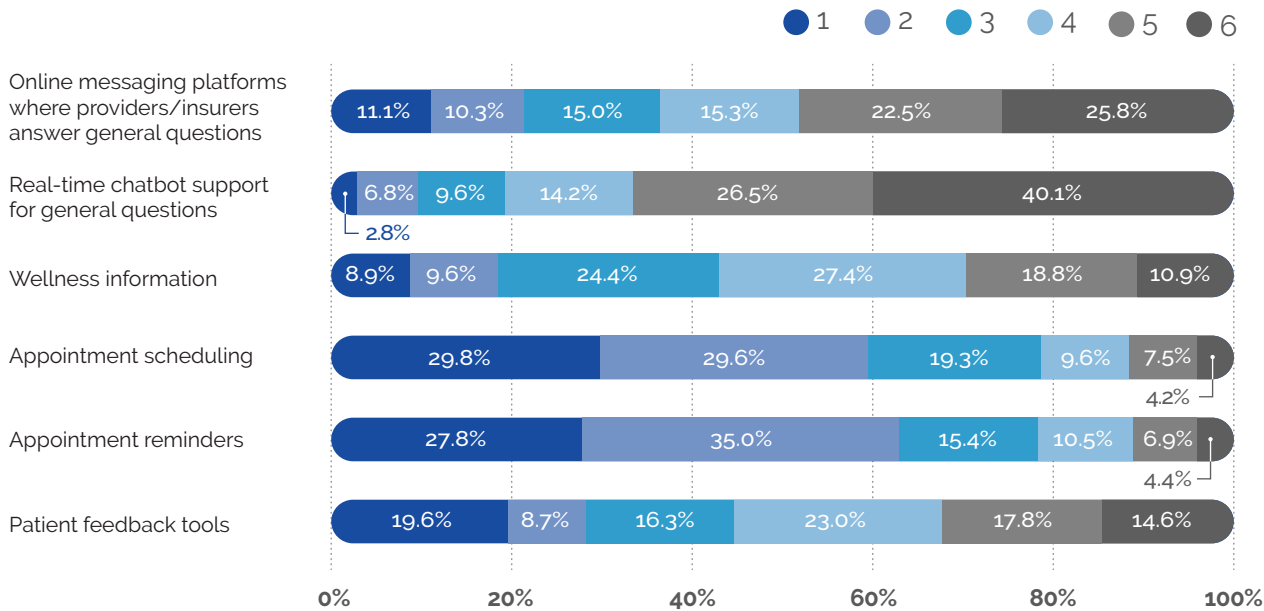
The digital transformation of healthcare has paved the way for an array of tools and platforms that empower consumers to take charge of their health like never before. The survey highlights a significant shift in consumer behavior, with 57% reporting an increased utilization of digital tools to engage with healthcare providers and health plans over the past year. This trend is indicative of a growing acceptance of technology as a means to access care, manage health and communicate with healthcare entities.



50% believe using digital tools for healthcare (prescription reminders via an app, personalized health recommendations based on medical history, etc.) can help them better take care of their health.

The fact that a significant portion of healthcare consumers recognize the potential benefits of digital tools in enhancing their self-care and overall health management underscores the importance of integrating digital solutions into healthcare delivery. Patients increasingly view these tools as valuable aids in staying on top of their healthcare regimen, ensuring medication adherence and receiving personalized guidance for their specific health needs. Healthcare providers and health plans that prioritize the development and implementation of user-friendly digital tools are more likely to better meet patient expectations for enhanced self-care and proactive health management, ultimately leading to improved patient outcomes.

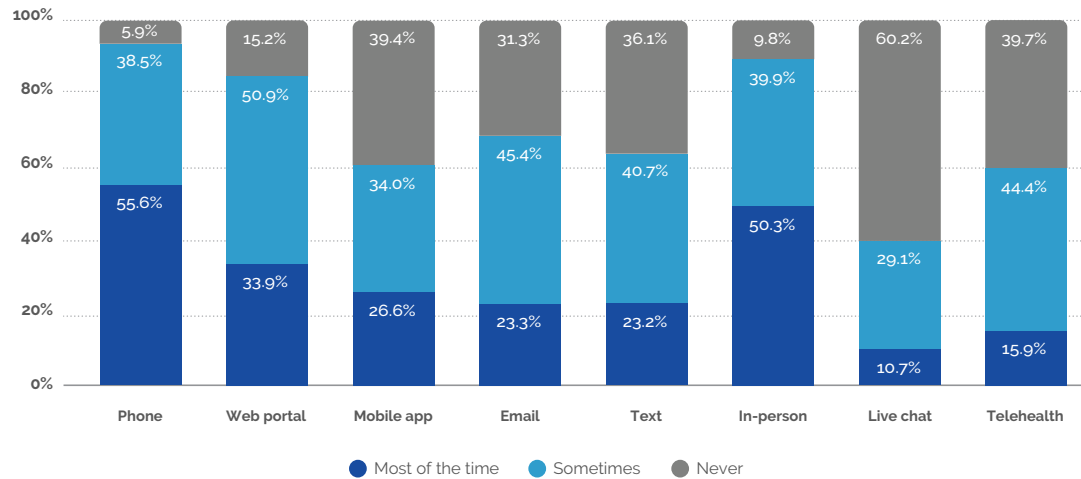
Figure 5. Which of the following digital engagement capabilities do you use the most when interacting with a healthcare insurer or provider?



Appointment reminders and appointment scheduling are the most frequently used digital capabilities by >60% of consumers.

While appointment-related features dominate digital usage, patient feedback capabilities have gained importance, ranking in the top three for 45% of consumers. This suggests a growing recognition of the significance of patient input in shaping healthcare delivery. However, consumers seem to not yet find substantial value in AI-driven chatbots for general inquiries. Close to 67% rank real-time chatbot support as their least preferred digital capability or second to last among the available options. These findings emphasize the pivotal role of digital capabilities in facilitating patient access to care, enhancing patient-provider communication, and streamlining administrative processes. They also help healthcare leaders define investment priorities.

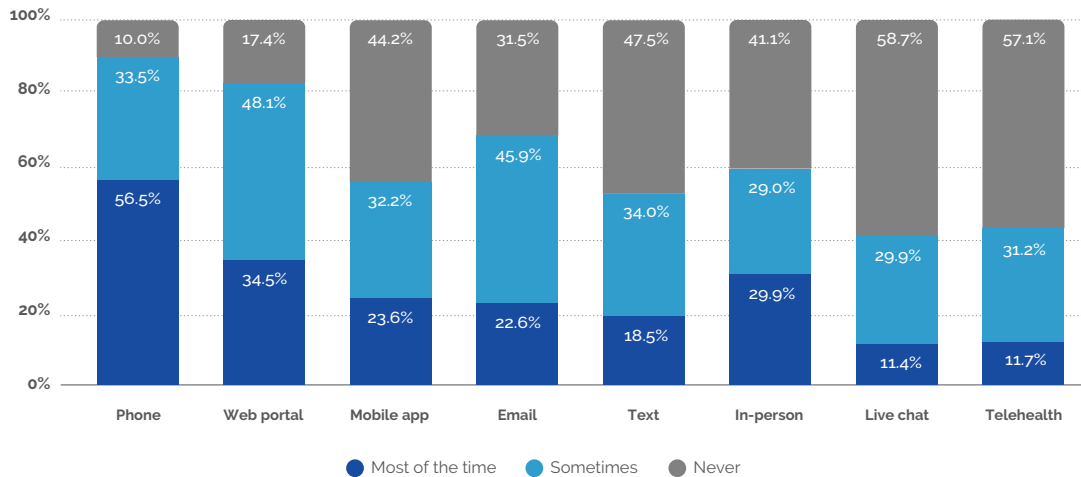
Figure 6. How often do you use the below methods of communication when engaging with healthcare providers?



Over 80% of consumers use a web/patient portal most or at least some of the time to communicate with healthcare providers and health plans.

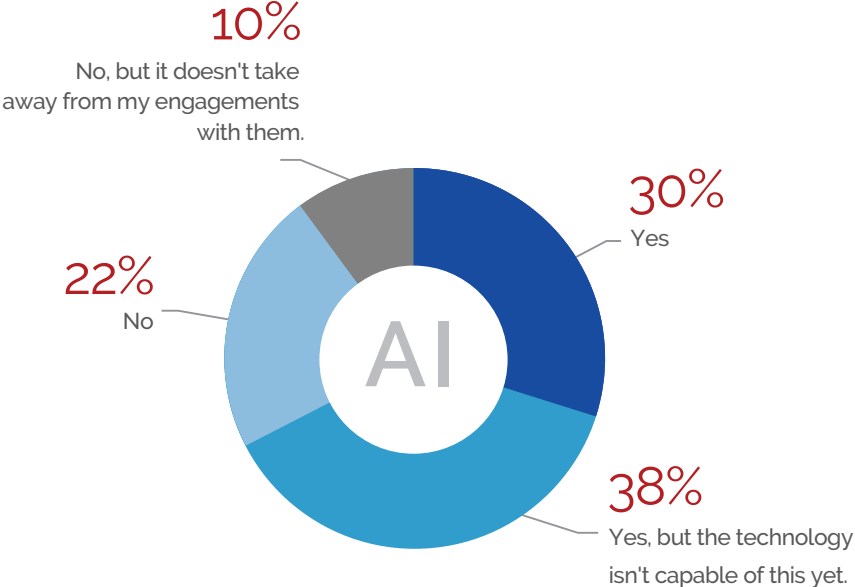
While traditional communication channels like phone remain prominent, there is a significant and growing interest in digital channels, particularly web/patient portals. This shift toward digital engagement signifies a changing landscape in patient-provider communication preferences which needs to be taken into account when healthcare organizations build their communication strategies. Here it's important to note again that, while gaining traction in other industries, chatbots are currently underutilized in healthcare. We can certainly say that there is a growing need for healthcare organizations to offer a diverse range of communication options that cater to various patient preferences and technological comfort levels.

Figure 7. How often do you use the below methods of communication when engaging with healthcare plans?



AI has the potential to enhance healthcare

Figure 8. Do you believe AI has the potential to enhance healthcare, specifically when it comes to more efficient communications with your provider or insurer, getting clear and quick insights on health conditions, wellness, and driving overall better health



68% of consumers believe AI has the potential to enhance healthcare.

Artificial Intelligence has emerged as a transformative force across various industries, including healthcare. Sixty-eight percent of consumers acknowledged AI's potential to enhance healthcare experiences, particularly in streamlining communication with providers and insurers getting clear and quick insights on health conditions, wellness, and driving overall better health outcomes. However, 38% of those expressed reservations about the current capabilities of AI technology.

Figure 9. How would you feel about AI being used in the following specific use cases?

To provide me with general health and wellness education, not necessarily related to my personal healthcare needs or diagnoses

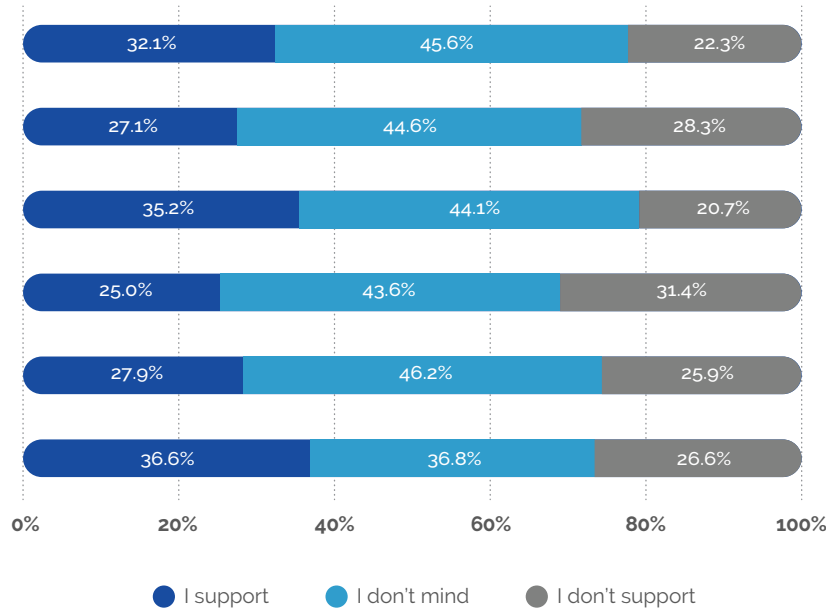
To recommend best practices for how my family or loved ones can support my treatment of chronic conditions that require ongoing care

To recommend preventative appointments that I should be scheduling, and when to schedule them

To serve as personal health and wellness coaches for non-life-threatening conditions, providing best practices or recommendations

To analyze medical and any other available data (age, sex, language, transportation restrictions, location, etc.) to make unique, personalized health recommendations

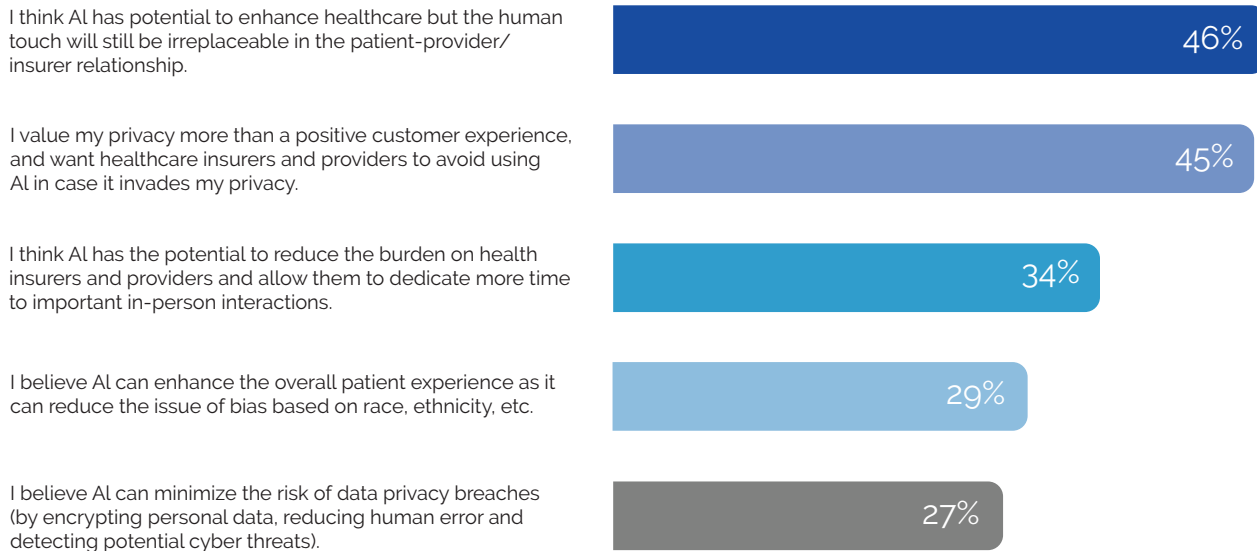
A 'first look' at medical results to identify areas of concern and screen out normal/ negative results before a medical professional reviews



74% support or don't mind AI being used to analyze available medical and consumer data to make unique and personalized health recommendations.

There is a growing acceptance of AI's potential to deliver tailored healthcare guidance based on individual health profiles, preferences and needs. Thirty-seven percent of consumers are open to AI's use as a preliminary tool to identify areas of concern in medical results and filter out normal or negative findings before a medical professional review. Additionally, 35% of consumers endorse AI's involvement in recommending preventative appointments and scheduling them at optimal times. These findings suggest that consumers are receptive to AI-driven solutions that can enhance the efficiency of healthcare delivery, reduce diagnostic delays and promote proactive health management.

Figure 10. Which of the following best reflects your overall feelings around the use of AI in the healthcare industry?



46% of consumers think AI has potential to enhance healthcare experiences but the human touch is still irreplaceable.

While a substantial portion of consumers recognize the potential for AI to improve healthcare interactions, they also emphasize that the human element remains indispensable in the patient-provider and patient-insurer relationship. This underscores the enduring importance of empathy and compassion when integrating AI into healthcare services. Certainly, any AI-driven initiative should be approached with utmost sensitivity to patient privacy. Robust privacy safeguards and transparent data usage policies need to be in place to increase trust and adoption and ensure compliance with regulatory requirements.

Summary

The insights from this survey will benefit healthcare executives striving to enhance digital engagement and bolster patient relationships. The survey's exploration of consumer perspectives on digital engagement and AI within the healthcare domain reveals a rapidly evolving landscape. Patient expectations, digital tools and AI technology are converging to redefine the patient experience.

By taking cues from these insights, healthcare leaders can chart a course toward patient-centric care that leverages technology while upholding the human touch and patient privacy. In this way, the healthcare industry can embrace the digital future without compromising the core principles of compassionate and effective healthcare.

To align strategies with these trends, healthcare executives should aim to:

- 1. Know thy customer** – Create a single customer view, one that aggregates consumer information from multiple channels and sources, resolves identities and provides a complete unified profile of each individual consumer (i.e., Golden Record) that is accessible across the enterprise, and available in real time.
- 2. Simplify consumer experience** – Use the Golden Record to enhance digital experiences and consistency across channels. Personalize every step of the consumer journey and remove all possible frictions to improve customer satisfaction and loyalty.
- 3. Personalize communications** – Capitalize on your first party data. Understand and activate the consumer's preference for personalized and proactive communications. Using preferred channels deliver preventive recommendations and next-best action that achieve omnichannel consistency and real-time relevance.
- 4. Adopt practical AI extensions** – Ensure any AI initiatives are fueled by clear and consistent consumer data from the Golden Record, and leverage AI models as part of the capability set to simplify & personalize engagement. Harmonize coexistence of human expertise and AI capabilities to facilitate proactive care management while carefully maintaining transparency and data privacy.

In conclusion, the insights from the report suggest that to create a more agile ecosystem healthcare leaders need to adopt a holistic human-centric approach supported by technological advancements. An approach where digital and in-person experiences seamlessly blend to form a unified healthcare journey that drives optimal health and business outcomes. As the industry continues to evolve, it's important to recognize that the fusion of technology and empathy will be pivotal in shaping the future of healthcare delivery.



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