

Engaging the Digitally Inclined Healthcare Consumer

For years, consumers have been forcing shifts in how healthcare is delivered. Now, consumer preferences for where and how they receive care and communicate with providers are even more pointed.

Huron's longitudinal research of the consumer healthcare market, which began in 2019, identified five distinct consumer segments defined by how individuals choose and use healthcare. [Follow-up research](#) illustrates which trends have changed as healthcare has evolved and which remain the same.

Of the five consumer segments, the digitally inclined cohort has seen the most change. Notably, the size of the digitally inclined consumer segment, doubled and was the only segment that grew.

Not only did Huron's research show the growth of a consumer segment driven by digital interactions, but all consumer segments are more interested in digital health experiences. This growth underscores the urgency for healthcare organizations to continue to invest in digital health solutions to drive patient satisfaction and brand loyalty.

Who Is the Digitally Inclined Healthcare Consumer?

The digitally inclined consumer segment represents 34% of healthcare consumers surveyed by Huron and continues to evolve and expand. For example, while digitally inclined consumers tend to be younger (18-44), the percentage of digitally inclined consumers ages 45 and older has nearly doubled since 2019.

Perhaps more importantly, the majority of survey respondents across all demographics report being digitally active and fluent, indicating readiness for increased digital healthcare.

34% of consumers are digitally inclined, up from 17% in 2019

Digitally inclined healthcare consumers value the availability of digital tools from their providers, which is closely tied to their desire for a more connected, personalized end-to-end care experience.

Identifying the size of an organization's digitally inclined population and the overall digital readiness of its consumer population will be critical for organizations making strategic investments in how and where they deliver care in the next five years and beyond.

What Does the Digitally Inclined Consumer Value?

Overall, healthcare consumers are seeking ways to take a more active role in their health. For example, consumers' overwhelming desire for a single point of contact for their healthcare information held steady from 2019 to 2021. During that same time, the percentage of consumers interested in a universal electronic health record (EHR) to better manage their care rose to 71%.

67% of consumers want a single point of contact for their healthcare information

Digital tools, including virtual care, are carrying more weight in consumer experiences and influencing their decisions. More than 50% of consumers surveyed say they are willing to switch providers for virtual care offerings.

53% of consumers are willing to switch providers for superior digital offerings

Not surprisingly, consumers are now [prioritizing the availability of telehealth and virtual care](#). A full 78% of all consumers surveyed by Huron participated in a telehealth visit, and 75% of those consumers were satisfied or very satisfied with their telehealth experience.

Beyond loyalty and satisfaction, consumers' growing digital preferences also influence how they choose and interact with health systems and providers. Digitally inclined consumers value online quality ratings, reviews and comparison tools to guide their healthcare decisions. Moreover, support for mobile apps remains strong across all consumer segments, with 55% of consumers interested in apps for healthcare needs such as scheduling appointments, asking questions, finding new physicians and checking results.

As technology and the industry evolve, consumers will increasingly expect a convenient, technology-enabled experience.

Engaging Digitally Inclined Consumers

As the digital transformation of healthcare accelerates, it will be essential to have flexible models that engage consumers differently in a growing and broad digital landscape.

While a "consumer-first" mindset has not typically guided strategy, healthcare organizations will need to figure out how to develop and deliver on consumer priorities. To move toward a more consumer-centric model and better engage the rapidly growing digitally inclined segment, organizations should:

Identify consumers' preferences:

Healthcare leaders should strive to create a multidimensional view of their consumer base to understand their health goals, how they make their healthcare decisions and what they value in their healthcare experiences. Comprehensive consumer insights and analysis will aid leaders in creating a view that extends beyond clinical or financial information. From there, leaders can better identify which specific tools will [enable a positive consumer experience](#), keeping in mind the solution may not be the same for every consumer.

Make care more convenient and connected:

By communicating through digital tools, healthcare organizations are delivering information in the way digitally inclined consumers most prefer. This approach builds trust — another foundational element of any strong relationship — since digitally inclined consumers are more likely to trust and interact with providers who communicate digitally. Convenience must encompass the end-to-end experience, including using digital tools to reduce wait times and improve access.

While the digitally inclined consumer segment grew, Huron's research finds increased readiness for digital tools across all segments, providing avenues to improve care for all consumers. For example, more than half of respondents say they are willing to switch providers for better virtual care offerings for both day-to-day care (54%) and the treatment of serious medical conditions (55%). The [expansion of digital tools, telehealth and virtual care](#) will continue to play a role in driving patient volume and elevating consumer loyalty and satisfaction.

Personalize the consumer experience:

Huron's research finds that consumers are looking for specific digital options to provide deeper personalization of their care experience and treatment plans. Wearables, for example, continue to represent a significant opportunity for organizations to engage consumers. Huron's research finds that of those who use a wearable (more than half of respondents), 49% report sharing health-related data from their wearable device with providers as part of a treatment plan, up from 31% in 2019. Another 45% of wearable users would be willing to share their data.

Healthcare organizations can use consumer health data to engage patients and their caregivers, ultimately driving better clinical outcomes. With more on-demand consumer data, clinicians can build care plans that align more precisely to individual health goals and potentially address the nonmedical factors or [social determinants of health](#) (SDOH) affecting patients. This could be as simple as making consumers aware of relevant healthcare services, such as telehealth options or nutrition programs.

Maintain a focus on data security:

Although the digitally inclined are more willing than other consumers to share their health data, they still need the same level of [data privacy and security](#). Healthcare organizations need to be transparent regarding how that data is being used and what the organization is doing to protect consumers' information.

Consumer demands are driving the need for high-quality care that accounts for consumer interest in digital services and their increased concerns for risk and safety. By understanding the digitally inclined consumer and effectively engaging them, healthcare organizations can satisfy both preference and practicality.

Key Takeaways

Healthcare organizations can better engage the digitally inclined consumer if they:

Think differently.

Recognize how consumer demands and preferences are leading them to seek alternative, digital models for care.

Plan differently.

Evaluate the organization's current digital tools and explore what other options may advance both consumer engagement and outcomes.

Act differently.

Provide a personalized, intuitive and secure care experience.



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