Digital Satisfaction Index Spotlight: Telehealth's Impact on Healthcare Services

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Produced by

Intent Lab™

Presented by Performics & Northwestern University

Observing the need in the industry to uncover consumer intent, in 2015 **Performics and Northwestern University Medill School** partnered to create a research unit, the **Intent Lab™**, to find new ways to strengthen brands through a better understanding of how consumer decisions are made and how brand engagement can be improved. Since then we've been releasing scientific, academically credible research projects under the Intent Lab unit.

What is the Digital Satisfaction Index (DSI)?

The **Digital Satisfaction Index™** (DSI) is a global measure of consumer attitudes and perceptions of online marketing from the Intent Lab™ research unit. Since 2016, DSI measures the top four factors of digital satisfaction; **trust, privacy, utility** and **social**, twice a year, tracking the level of importance and consumer satisfaction. Each Digital Satisfaction Index study focuses on a different spotlight topic. Our most recent DSI study focuses on increased telehealth usage as a result of COVID-19.

Marketer's guide to decoding DSI

The Digital Satisfaction Index analyzes online consumer satisfaction based on four key factors: Utility, Privacy, Trust and Social.

In order to fulfill the needs and expectations of consumers during their moments of intent, marketers need to deliver experiences that are utilitarian and seamless, that convey trust and privacy, and that embrace social interactions.

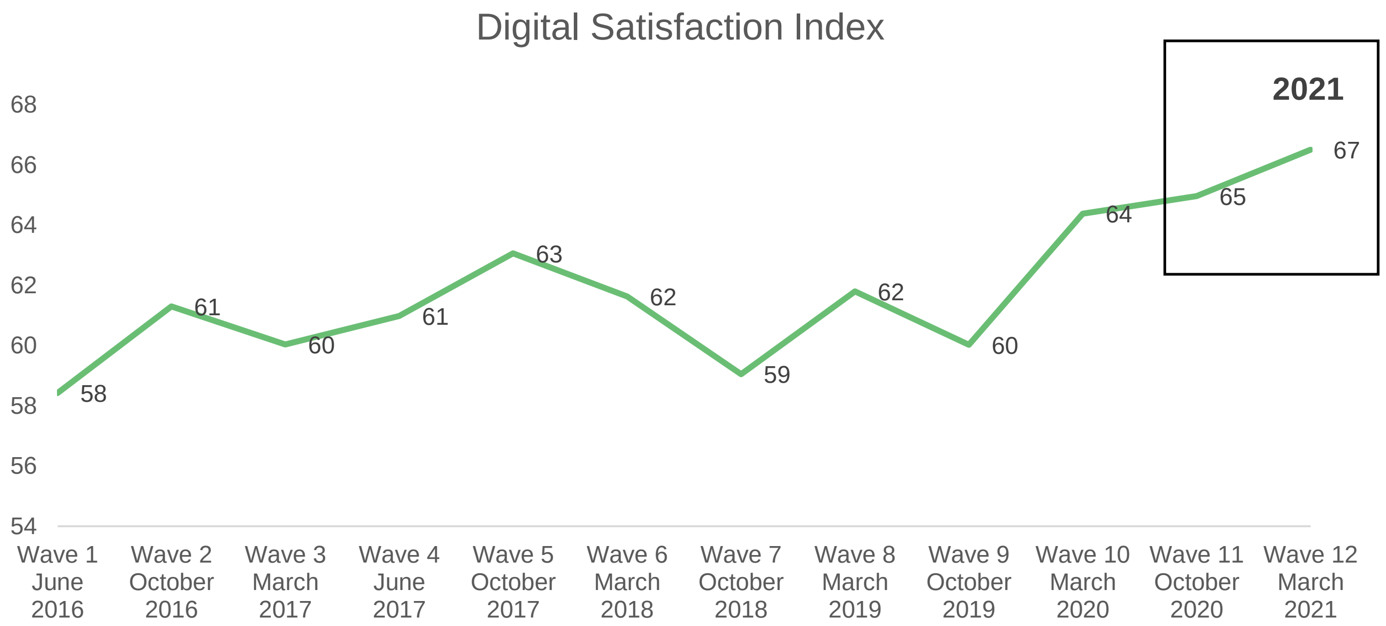
Utility	The usefulness of an online experience, including the assessments of how efficient it is to get things done online versus offline and how easily information can be accessed	• **Ease** • **Convenience** • **Efficiency**
Privacy	The level of comfort that users have with information being collected about them online	• **Security** • **Control** • **Safety**
Trust	Attitudes about the credibility of information presented online	• **Transparency** • **Consistency** • **Accuracy**
Social	The level of engagement in social interactions online, both their enjoyment engaging with others and with getting glimpses into the lives of others	• **Community** • **Participation** • **Interaction**

Overall digital satisfaction continues to increase, a year into the COVID pandemic.

Satisfaction is driven primarily by Utility and Social factors, while Trust and Privacy remain low.

Our study revealed:

- The COVID pandemic has forced social interactions to become virtual and remote work to sustain productivity*. This abrupt shift to digitalizing everything had a positive impact in DSI which has increased since our last wave.



*Source: Society for Human Resources Management, Study Finds Productivity Not Deterred by Shift to Remote Work, 2020
**Source: Becker Friedman Institute of Economics at the University of Chicago, Why Working From Home Will Stick, 2021

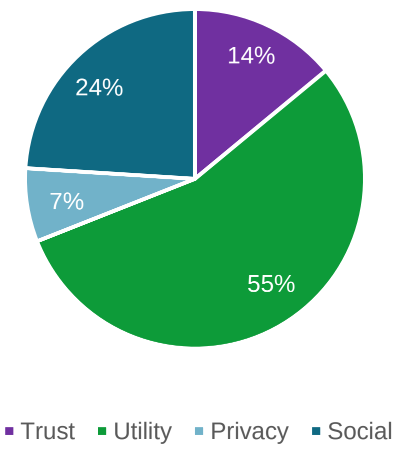
65% of study participants are satisfied with their social digital experience, the highest it has been since 2016

Importance of a solid Social experience has grown by 5%, indicating a craving for community.

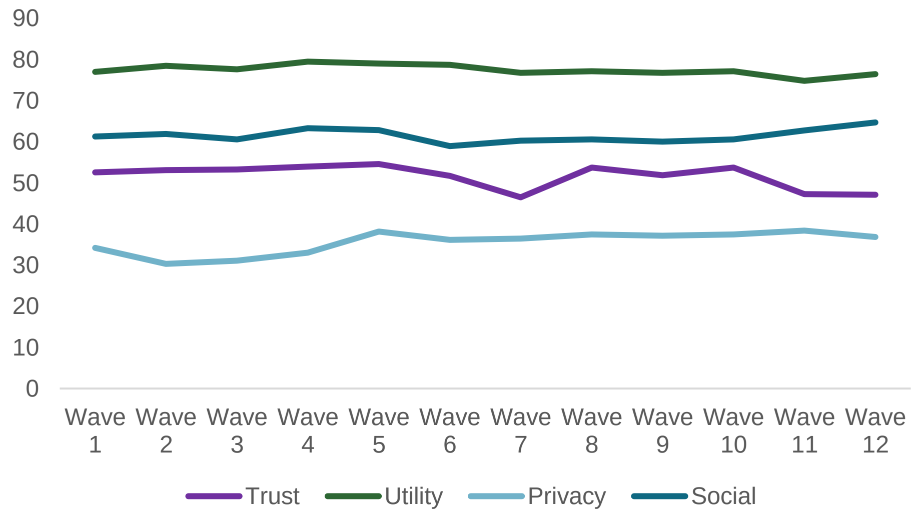
Our study revealed:

- Many people have turned to social media to mitigate feelings of isolation and bolster creativity*. This growing need for escapism, according to our study, has improved social satisfaction.
- Exposure to misinformation and disinformation – specifically surrounding COVID – have created a rift between consumers and mainstream media organizations**. This has not only decreased Trust satisfaction, but also lowered Trust expectations and importance.

DSI Factors Importance Weight
Wave 12, March 2021



DSI by Factors



*Source: Vox: Recode, Posting less, posting more, and tired of it all: How the pandemic has changed social media, 2021
**Source: American Psychology Association, Controlling the spread of misinformation, 2021

Spotlight:
Challenges and Benefits of Telehealth due to COVID-19

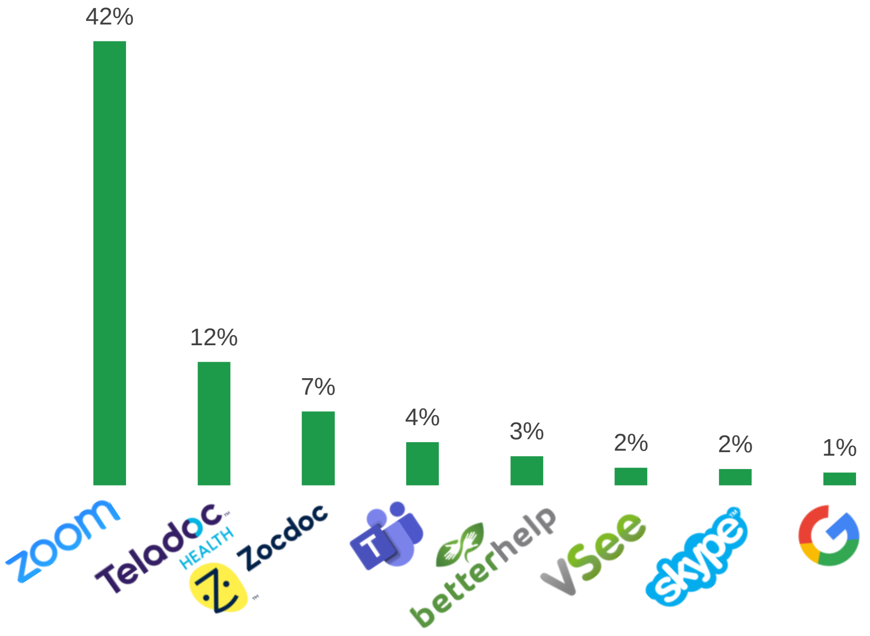
Consumers have turned to telehealth for healthcare service due to social distance limitations.

More than half (54%) of respondents have used telehealth, 68% of them being after COVID-19 started.

Our study revealed:

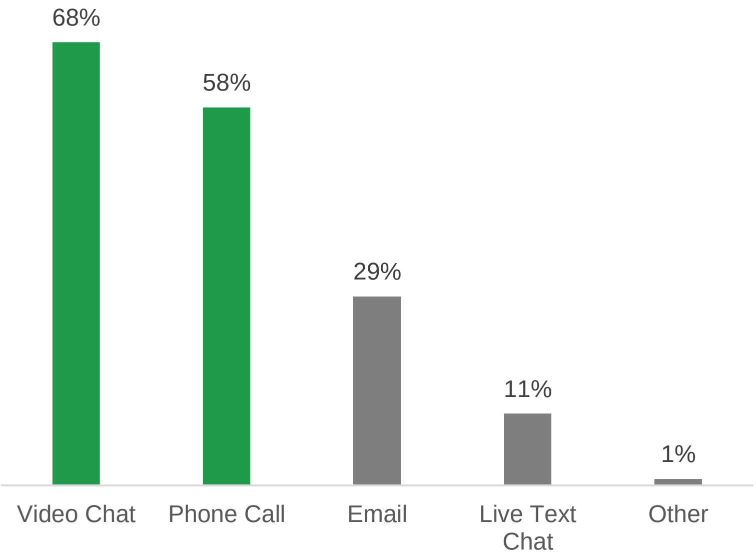
- Telehealth services are most commonly executed over **video chat (68%)** or a **phone call (58%)**.
- Of the top eight tools for virtual healthcare services, half of them are telehealth-specific tools (Teladoc, Zocdoc, BetterHelp, VSee), the other half being general telecommunication tools.
- Zoom is the most common telehealth tool, making up 42% of total responses.

Which virtual healthcare tools have you used?



Note: Open-ended, respondents were able to choose more than one

How did you communicate with your healthcare provider?

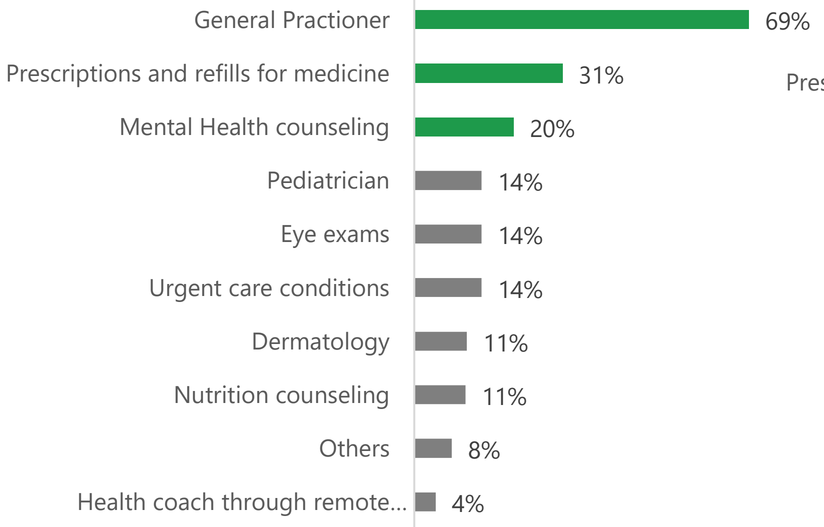


Depending on the service, consumers may be open to continuing telehealth service after COVID.

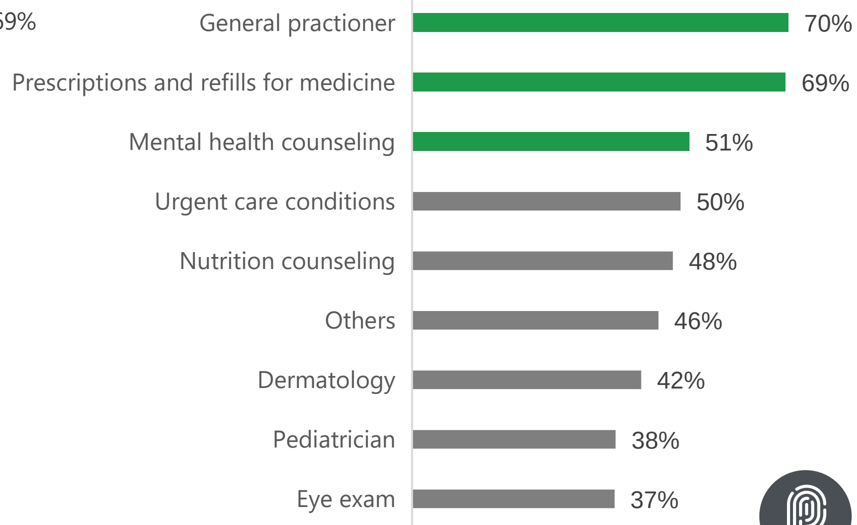
Our study revealed:

- Most consumers (69%) are using telehealth services to seek a **General Practitioner**, compared to those seeking specialists.
- Around **70% of respondents** were interested in getting **General Practitioner** services and **Prescription/Refills and Nutrition Counseling** through telehealth post-COVID.
- Respondents were less interested in continuing services that require specialized equipment or examination (Eye Exam, Dermatology, etc.) when in-person visits are more available.

If you have used telehealth, which service did you use?

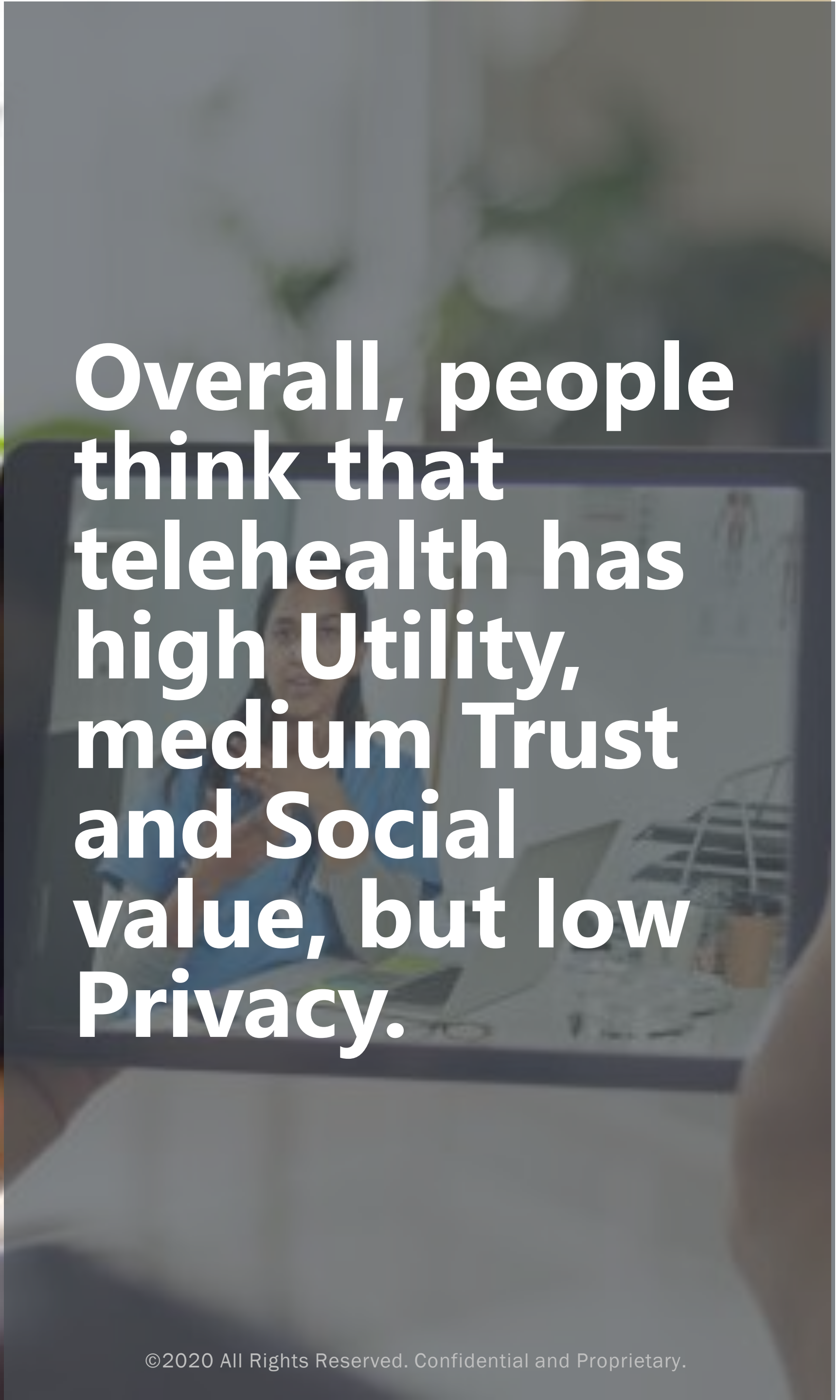


How likely are you to use the following telehealth services in the next year?



Note: Open-ended, respondents were able to choose more than one

Overall, people think that telehealth has high Utility, medium Trust and Social value, but low Privacy.



Our study revealed:

- The top 3 concerns for telehealth include, but not limited to **Credibility**, **Accuracy**, and **Physical Inspection,** followed by Privacy & Security and Communication concerns

#1 Credibility
"Not knowing if I am speaking with my doctor."

"Unqualified and inexperienced doctors"

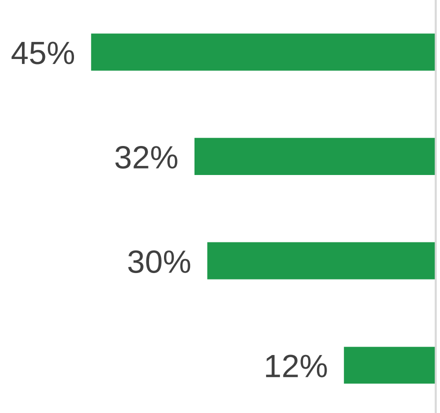
#2 Accuracy
"That it will be the wrong advice."

"Not being able to find a problem"

#3 Physical Inspection
"*No* lab or clinic work is *possible*"

"How do u analyze a sprained ankle"

Please rate your agreement on the following statement
(1=Not At All to 7=Very Much)



		Statements
45%	Utility	*Being online helps me get things done related to my health.*
32%	Trust	*I generally trust the health information I get online.*
30%	Social/Digital	*I use the Internet to engage in discussions about health with others.*
12%	Privacy	*I am (not) concerned about the privacy of my health information online.*

Note: Percentage of people who have selected 5, 6, or 7 on a 1-7 scale

*Source: US Department of Health and Human Services, Notification of Enforcement Discretion for Telehealth Remote Communications During the COVID-19 Nationwide Public Health Emergency, January 2020

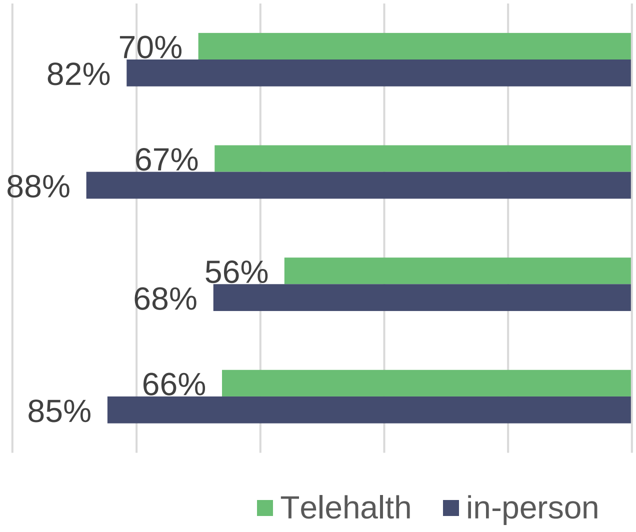
Across the DSI factors, people think telehealth has less value than in-person visits.

Respondents felt Trust & Privacy were most lacking in telehealth services when comparing to in-person visits.

Our study revealed:

- Due to the rapid shift to remote healthcare services, enforcement of HIPAA rules have been relaxed*. Though this is helpful to providing immediate access to telehealth, it could also compromise the Trust & Privacy value of the service.
- Almost half (44%) of respondents found the Social experiences with telehealth unsatisfactory.

Please rate your feelings about telehealth/in-person
(1=Not At All to 7=Very Much)



	Questions
Utility	How easy is (telehealth/in-person) to access and use?
Trust	How much do you trust (telehealth/in-person) services to access and use?
Social/Digital	How do you feel about receiving social recommendations about (telehealth/in-person) providers?
Privacy	How much do you trust (telehealth/in-person) providers with your private information?

Note: Percentage of people who have selected 5, 6, or 7 on a 1-7 scale

*Source: US Department of Health and Human Services, Notification of Enforcement Discretion for Telehealth Remote Communications During the COVID-19 Nationwide Public Health Emergency, January 2020

Most respondents (57%) think that telehealth is equitable overall.

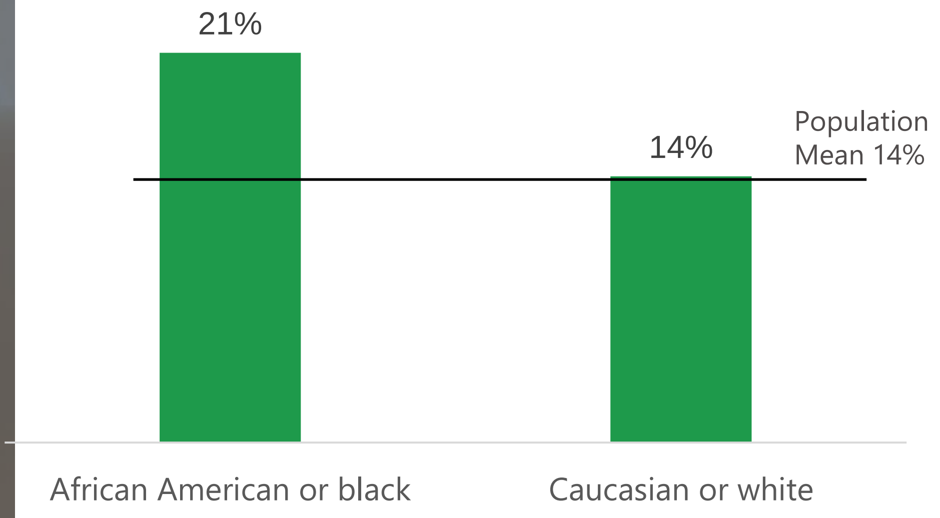
Older (36%) and lower-income (15%) people are more likely to question the parity of telehealth.

More males (15%) than females (7%) think telehealth is not equitable towards gender.

Our study revealed:

- Telehealth services require access to reliable internet service and digital literacy, both of which are disproportionately lacking for Black Americans*. Because of this, it makes sense that our study revealed more perceived **inequity in telehealth** services **from African Americans or Black respondents**.
- Additionally, the top 3 dimensions respondents feel lack equity are **Age**, **Physical Mobility**, and **Socioeconomic status**.

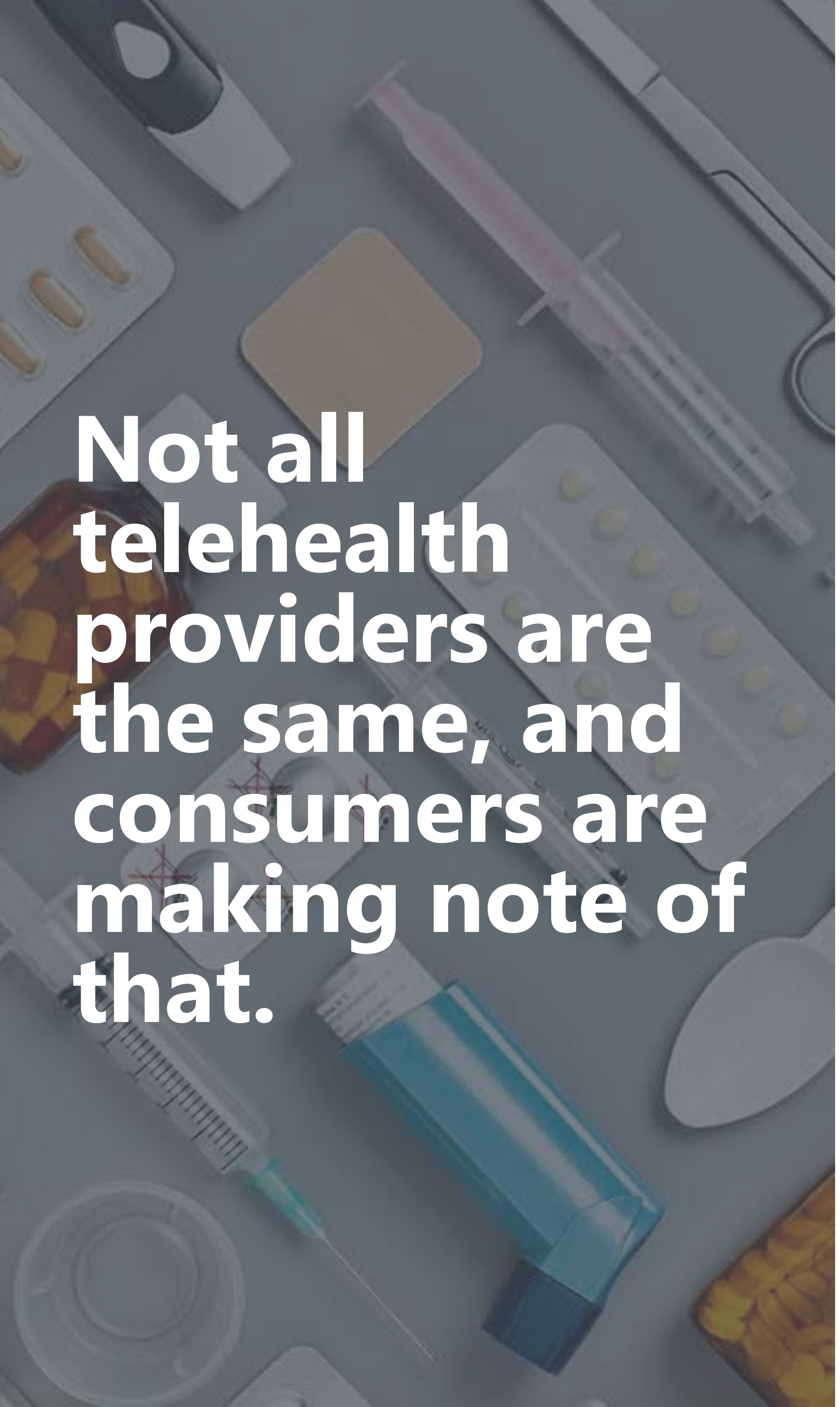
Do you think telehealth is NOT equitable in terms of race?



On which of the following dimensions do you feel telehealth is not equitable?

Dimension	Selected
Age	23.2%
Physical Mobility	23.1%
Socioeconomic	22.5%
Mental Health	18.3%
Race	14.1%
Ethnicity	11.6%
Gender	11.1%

*Source: Petrie-Flom Center at Harvard Law School, Bill of Health, How Telehealth Could Improve – or Worsen – Racial Disparities, 2020

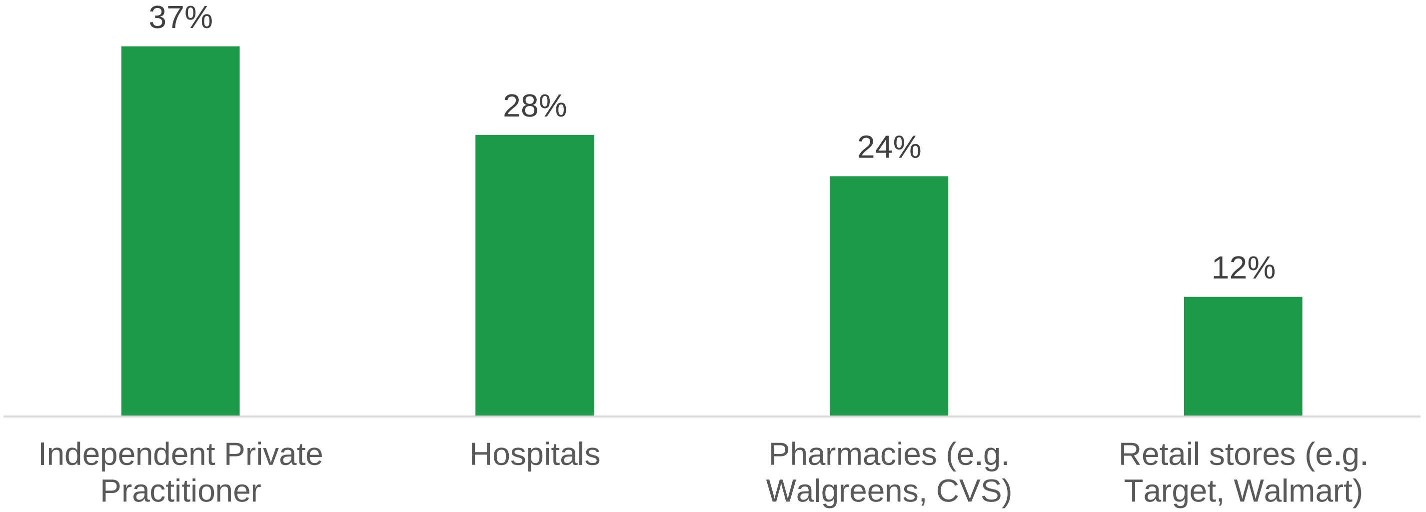


Not all telehealth providers are the same, and consumers are making note of that.

Our study revealed:

- Although retail stores provide affordable and convenient care*, our study shows that people trust **independent private practitioners (37%)** over **retail stores (12%)** for telehealth services, suggesting that consumers may value confidentiality over convenience.
- Private practitioners don't include a third-party – unlike the other types of providers – which allows for a more personalized physician-patient relationship**. This individualized care may increase the value of the service for the consumer.

Which of the following types of brands would you trust the most if they were to offer telehealth services?



*Source: MedCity News, Walmart divulges plans for 'healthcare supercenters,' 2020
**Source: US News & World Report, Why Private Practitioners Are Still the Best Choice for Consumers, 2018

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Brand Implications

What Does This Mean for Brands?

Brand Implications

Consumers are craving community and social interaction.

- Creating a digital space that closely simulates in-person interactions will improve consumer experience and increase favorability.

Remote services can be helpful, but it's not one-size-fits-all.

- Remote services have the capability to offer more accessible options for consumers, but brands should consider the factors that contribute to inequity.
- Even when provided equal access, consumers still may prefer in-person services over remote based on their individual needs and perception of value.

Consumers want convenient, but personalized experiences.

- Brands should tailor their product or service to the consumer as much as possible, especially, when it comes to healthcare.
- Apps/websites should be user-friendly and efficient in their purpose.

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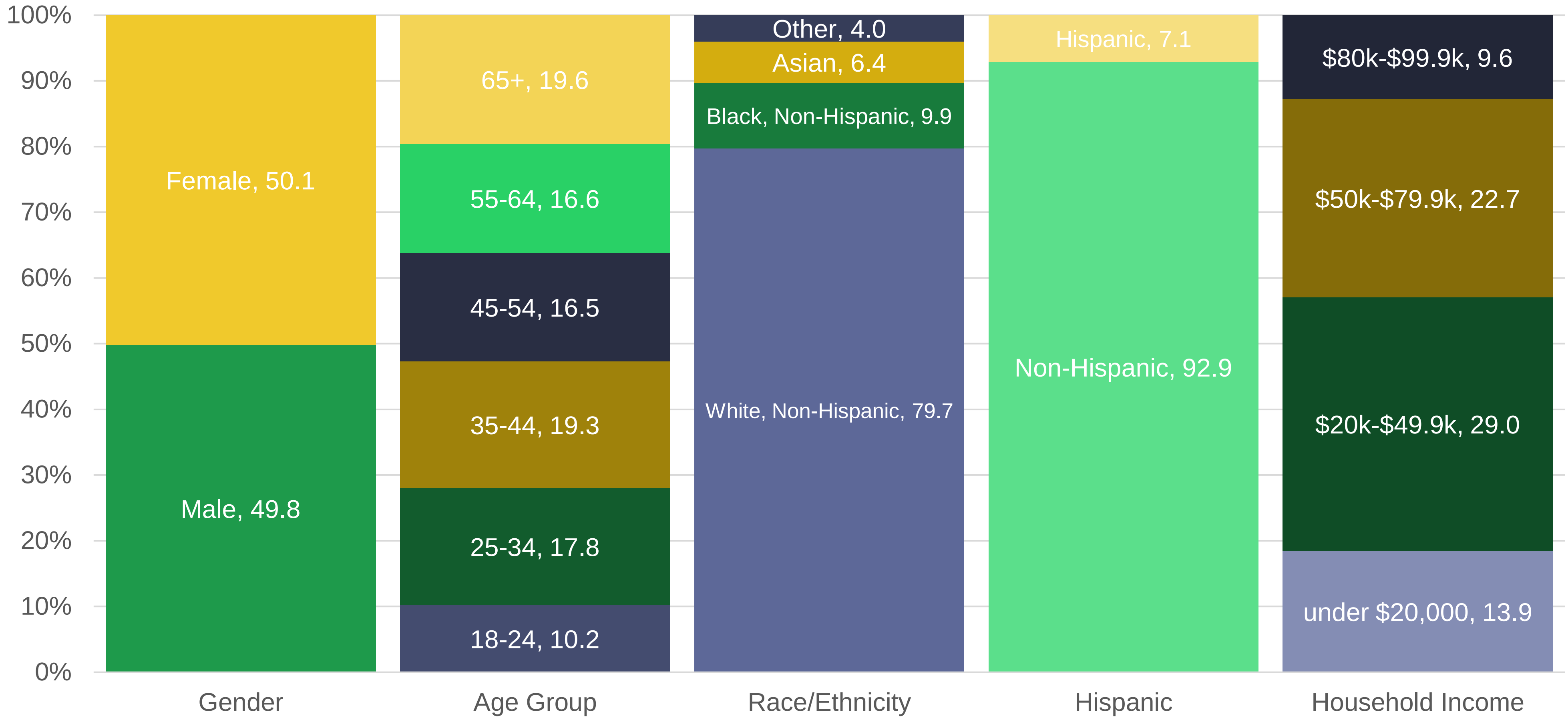
Methodology

U.S. Participants (n=1,006)



Field Dates: 3/19/2021 –3/31/2021

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Thank you!

Questions? Reach us at commsplanning@publicisgroupe.net