

2016 Health Care Segment Study – Detroit



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Consumers actively looking for health care information are mostly searching for doctors or trying to understand symptoms and illnesses

What consumers are looking for when researching healthcare



58%

Find a primary care doctor or specialist



55%

Research symptoms or an illness



19%

Research health care costs



7%

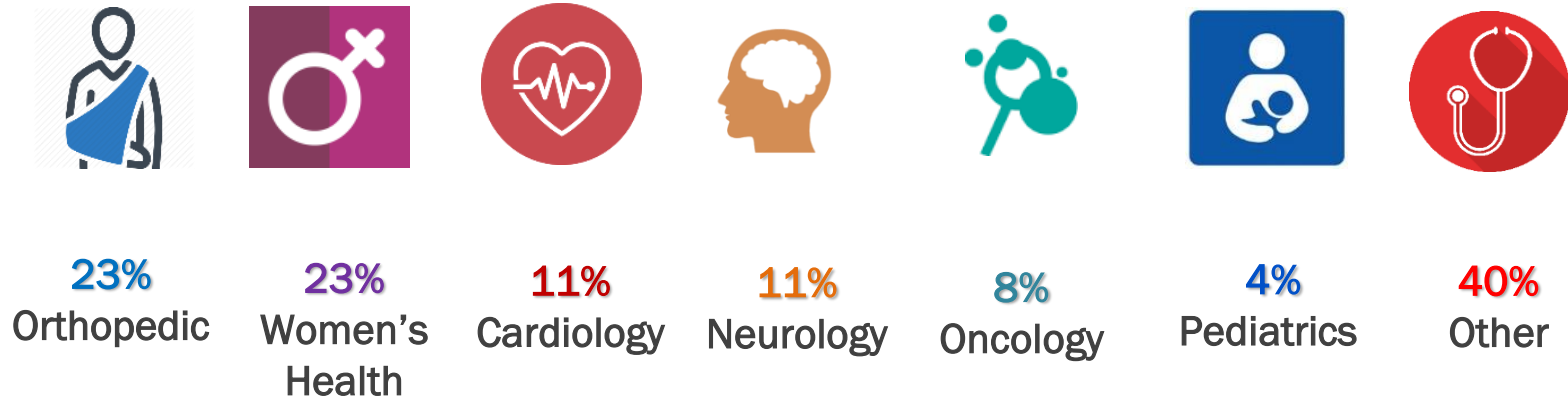
Find a hospital

Q2. Thinking about the most recent time you were looking for health care information, what did you need to do?
Q3. Which specialty area were you focusing on? (Find doctor, research illness; Base: National, n= 5,525; Detroit n= 327)



Specialties that consumers in Detroit are searching for

What specialty consumers are looking for when researching healthcare



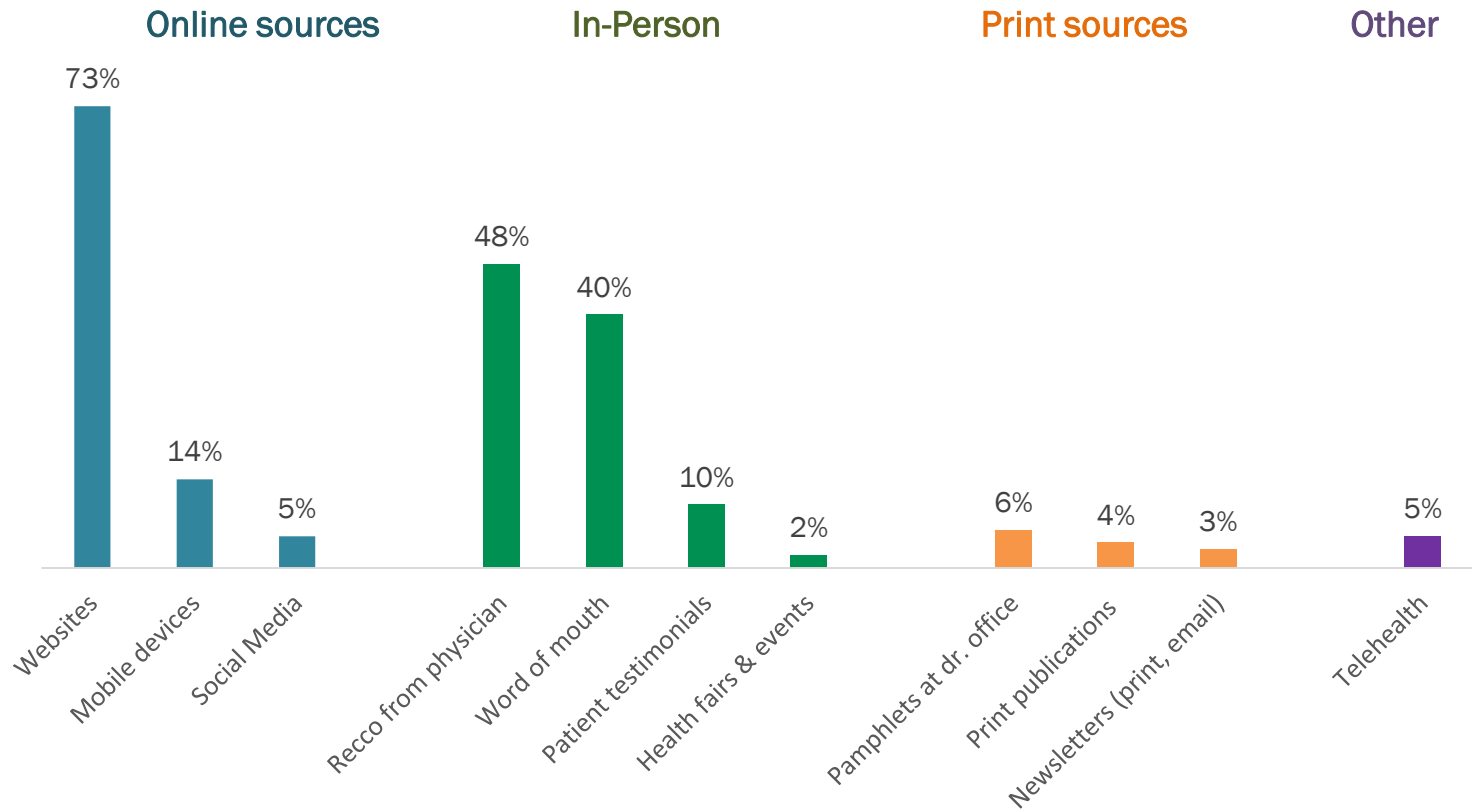
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The Patient's Journey: Researching Health Care Providers

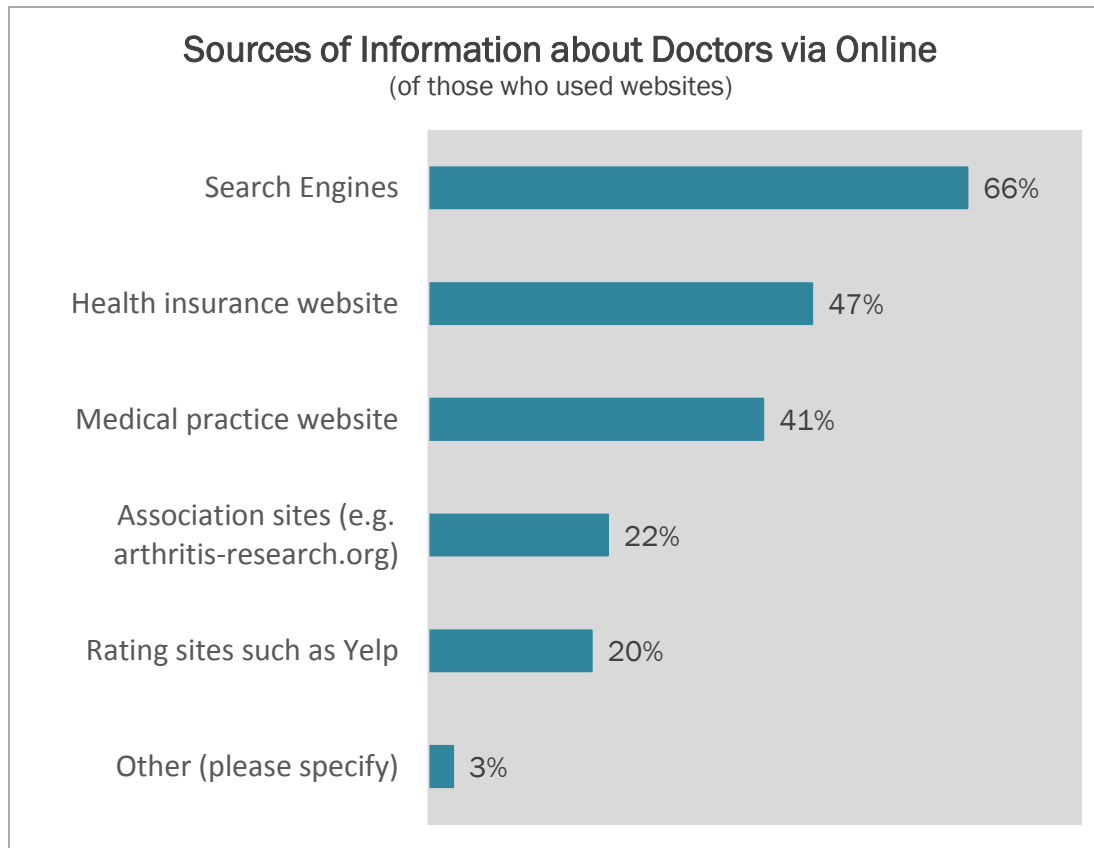
Websites, referrals, and recommendations play the biggest roles when researching health providers

Sources Used for Information on Doctors
(of those who researched doctors)



About 2/3 use search engines to find primary care doctors or specialists online

Health insurance and medical practice websites are additional sources of information about doctors

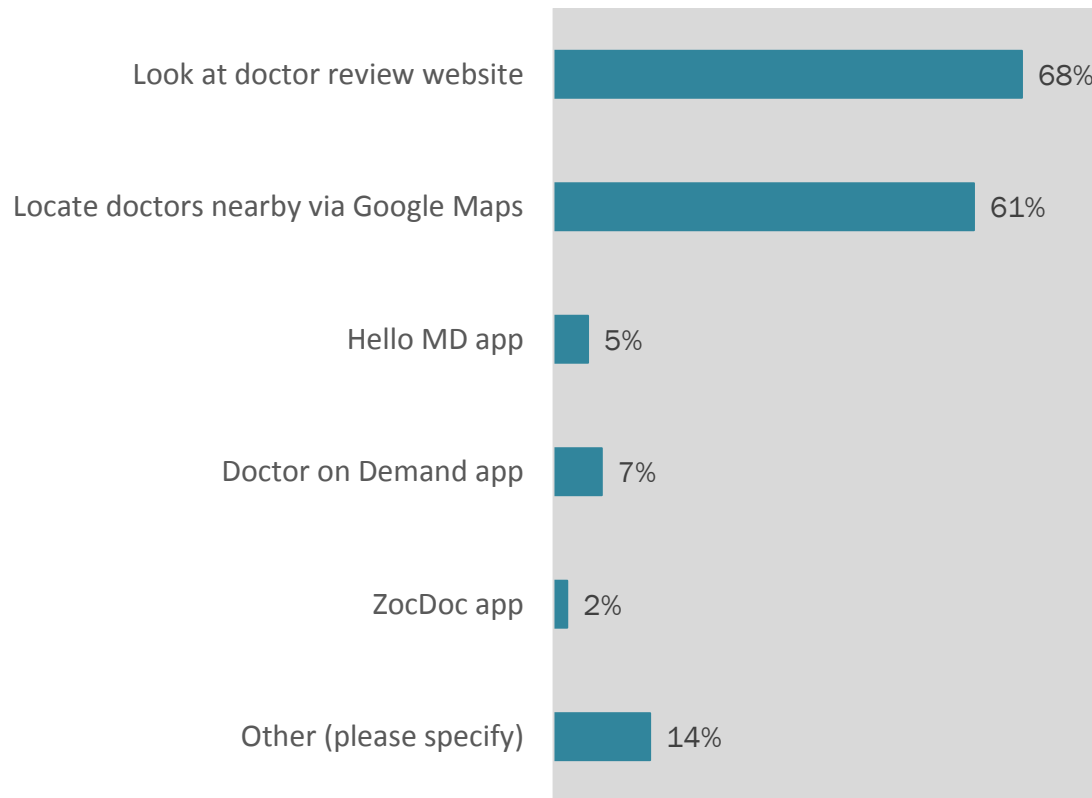


14% use mobile; most access review websites and map doctor offices

Portability makes mobile a convenient source to look up doctor information while on the go

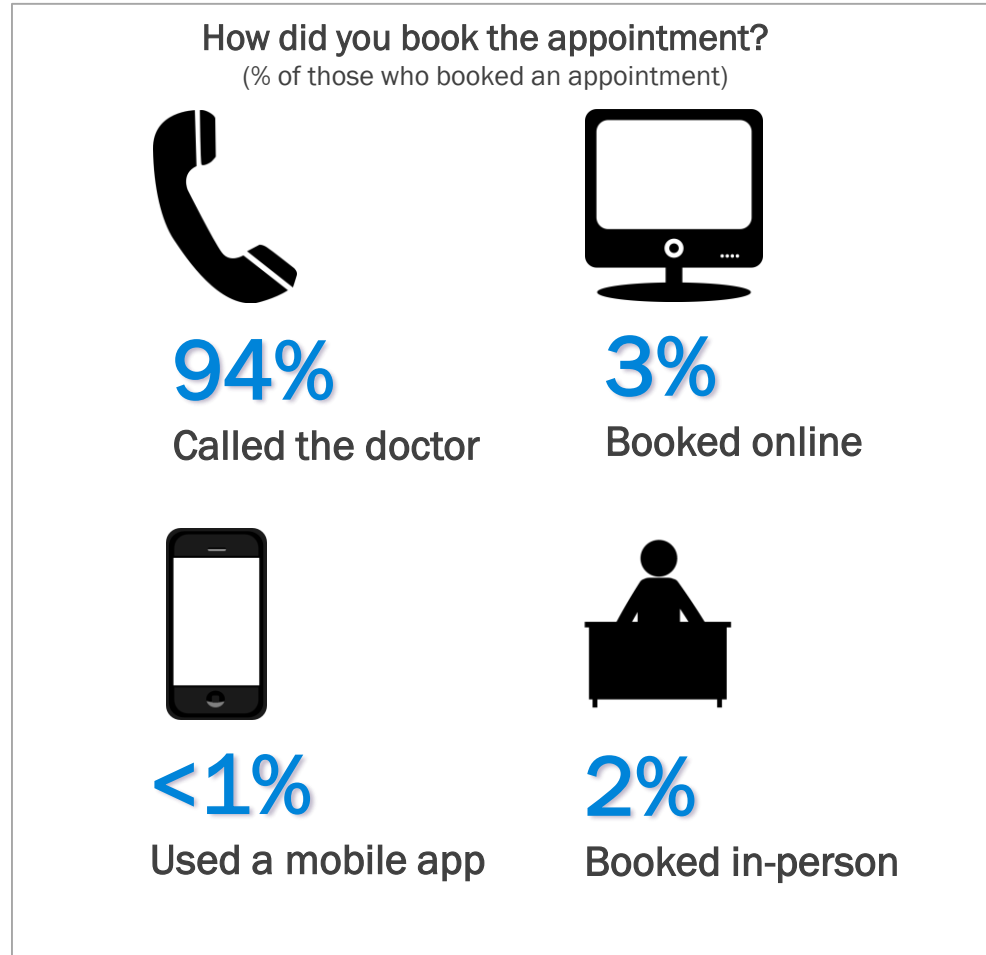
Sources of Information about Doctors via Mobile

(% of those who used mobile)



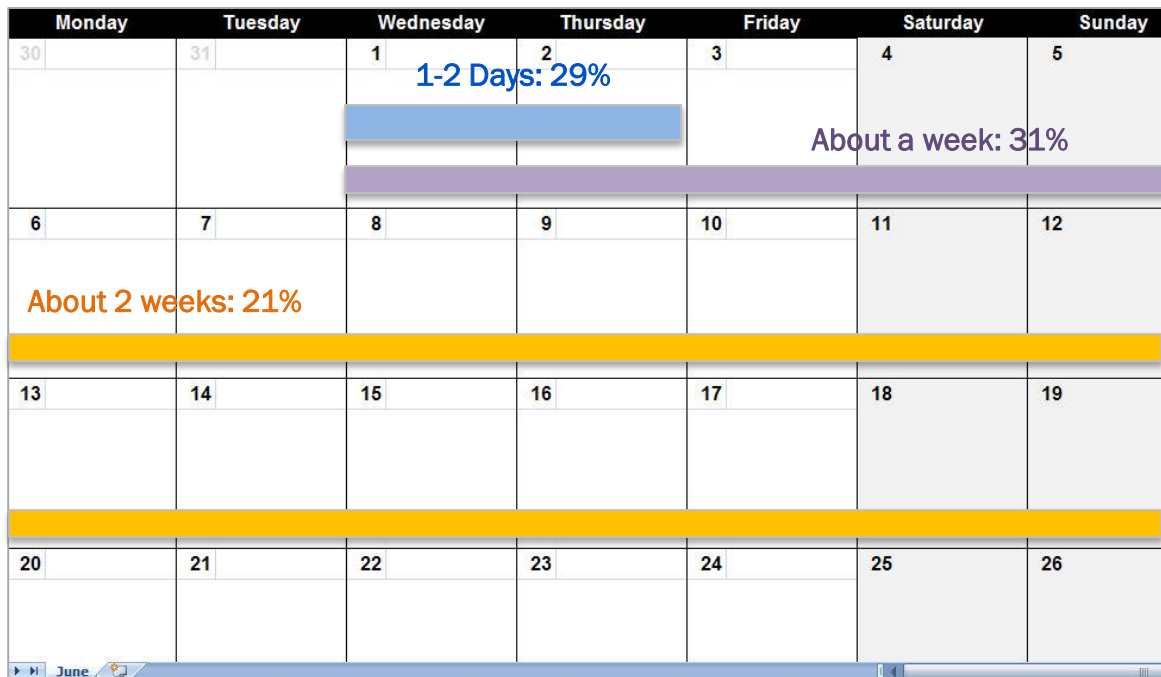
The Patient's Journey: Getting to the Doctor's Office

Patients prefer to call the doctor's office directly when booking appointments



Most take between 1 to 2 weeks from researching doctors to booking an appointment

Few are willing to let more than a month elapse between research and booking phase



(Detroit market only)

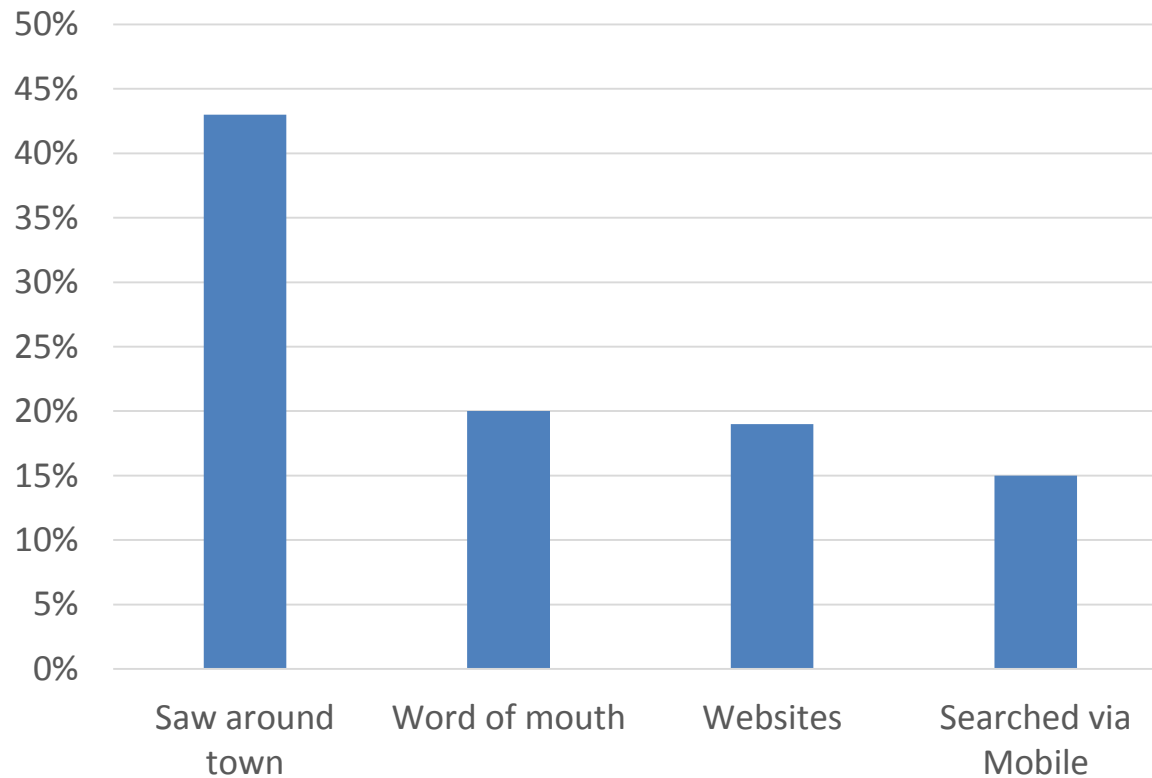
One month or more: 18%



More than 1 in 4 visit Urgent Care as a health care alternative

Urgent care clinics are perceived as faster and easier than going to the doctor and they are often preferred to a visit to the emergency room

How Patients Learned About an Urgent Care
(% of those who used urgent care)



Overall satisfaction with primary care provider depends on attention to patients, staying on schedule

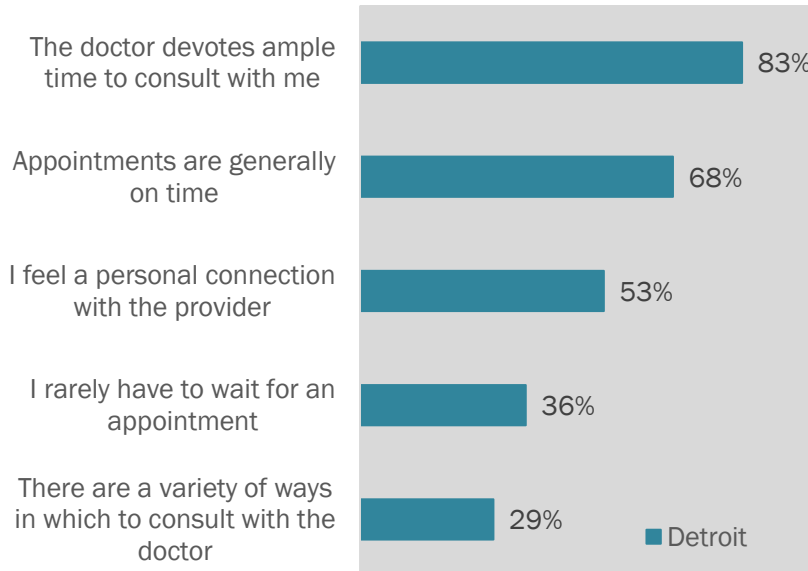
95%

Very/ Mostly satisfied with primary care doctor

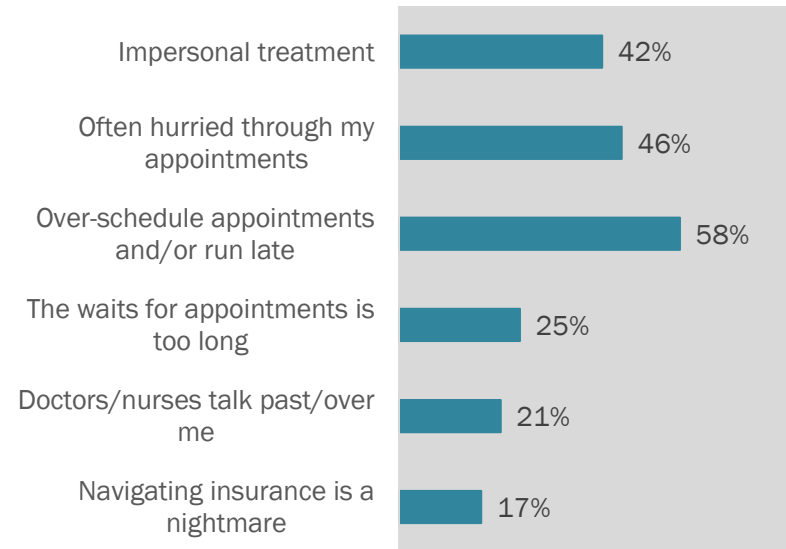
5%

Not very/ Not at all satisfied

Satisfaction Drivers



Why not?

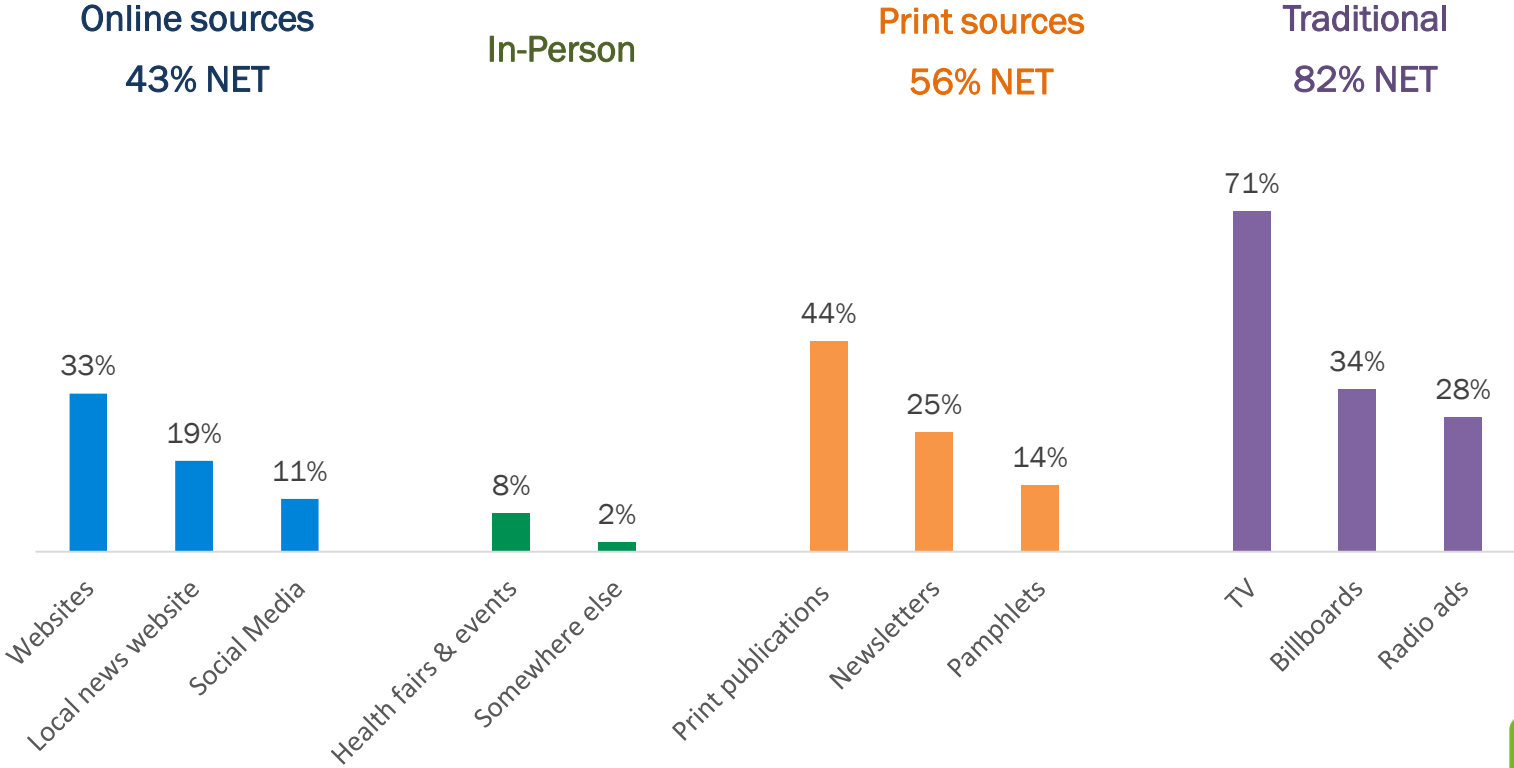


Q31. Do you currently have a primary care provider? Base: Detroit, n= 494 Q34. What would you say they are they doing right? Base: Very, Mostly satisfied, Detroit, n= 470 Q35. What would you say they need to improve? Base: Not very, Not at all satisfied, Detroit, n= 24 (caution—small sample sizes)

The Patient's Journey: The Role of Advertising

Print has second-highest ad recall after television

Recall Rate of Health Care Advertising, by Media
 (% of those who recalled healthcare advertising)



1 in 3 take action after seeing health care advertising

Ads are most influential driving research, opening up a discussion with doctor or requesting a prescription

Actions Taken (% of those who took action)

Research

68%



Searched for more info on doc or hospital

Visited doc or hospital website

Visited product, drug website

Called toll-free number

Consideration

53%



Considered doctor or hospital

Discussed ad with friend/relative

Discussed ad with doctor

Visit

39%



Made appt. or Visited doctor

Asked doctor to prescribe a specific drug

Consulted w/doctor via app

