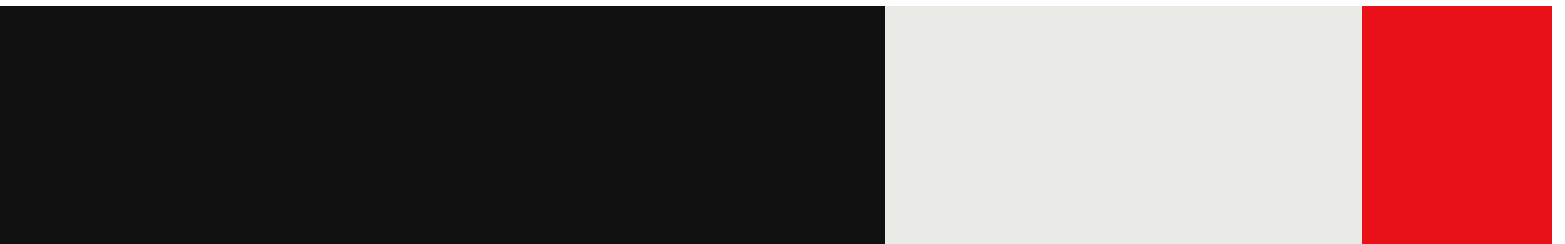


The Daily: The digital patient journey, health data for ad targeting, and Best Buy teams up with Atrium Health

Audio



On today's episode, we discuss what omnichannel healthcare should look like, how patients are using social media to find health information, and why physicians don't want to review their patients' wearable data. "In Other News," we talk about what will happen moving forward regarding patient health information being shared for advertising purposes and why Best Buy is teaming up with Atrium Health. Tune in to the discussion with our analysts Rajiv Leventhal and Lisa Phillips.



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Episode Transcript:

Marcus Johnson:

Hey, gang, it's Tuesday, March 14th. Lisa, Rajiv, and listeners, welcome to the Behind the Numbers Daily, an eMarketer podcast made possible by Meltwater. I'm Marcus. Today I'm joined by two digital health analysts. First of all, we introduce our principal analyst on the team who is based out of Connecticut. It's Lisa Phillips.

Lisa Phillips:

Hello, Marcus.

Marcus Johnson:

Hello, hello. We're also joined by one of our senior analysts on that very team. Based out of New Jersey, it's Rajiv Leventhal.

Rajiv Leventhal:

Hey, Marcus. Thanks for having me.

Marcus Johnson:

Hello, hello. All right, folks. Today's fact. This one's a good one, especially if you hate mosquitoes, which is everyone. Sorry, mosquitoes. You're the worst. You're not as bad as humans, but you're second. Playing electronic music can help keep mosquitoes at bay. So a 2019 study in Acta Tropica, which is an international journal on infectious diseases, researchers played the Skrillex song, Scary Monsters and Nice Sprites, which combines very high and very low frequencies, with excessive loudness and constantly escalating pitch, and it discouraged yellow fever mosquitoes from biting victims and from mating.

Lisa Phillips:

Well, it would discourage me from going anywhere near the music.

Rajiv Leventhal:

I was going to say-

Lisa Phillips:

Sounds awful for anything.

Rajiv Leventhal:

They're not the only ones that feel that way, I think.

Lisa Phillips:

Mosquitoes, I think cats, dogs, would flee.

Marcus Johnson:

That'd be discourager to a lot of folks. But, yeah, maybe have it just turned down a little bit in the background. This is very helpful news for folks in the, so I'm just about to leave the South of the US, before these very creatures come for me. But good to know for the future. The song, again, is Scary Monsters and Nice Sprites by Skrillex, if you also hate mosquitoes.

Lisa Phillips:

And your neighbors.

Marcus Johnson:

And people's ears, according to Lisa. Today's real topic, the digital patient journey.

All right, folks. In today's episode, we'll first look at the digital patient journey in the lead. And then for In Other News, we'll talk about folks using patients health data for ad targeting, and why Best Buy is partnering with Atrium Health. We'll start with the digital patient journey. Rajiv, this is a piece of research that you've just recently been working on. We'll talk about different health monitoring tools that folks use, their people's relationship with social media and health information, and why physicians don't want to review their patient's wearable data.

But we'll start with the word omnichannel. So, Rajiv, you start off by noting that patients demand an omnichannel healthcare experience. When I think of omnichannel in the retail world, or harmonious retail, as retail expert Steve Dennis calls it, I think of a seamless experience. Not to say all the retailers are quite there yet. When I think of the word

omnichannel in their healthcare world, I struggle to picture what that is supposed to even look like. So can the word omnichannel and healthcare really live in the same sentence at this point?

Rajiv Leventhal:

Yeah, it's a good question, especially when you think about what omnichannel means in other industries. In healthcare, which is far behind other industries in providing that seamless consumer experience that you talk about, and in incorporating technology into the patient journey, what it means is that consumers are now demanding a hybrid world of how they seek care and how they receive care. And that's one that combines virtual and in-person care.

And that goes beyond just telehealth, just having a video appointment with your doctor, but it includes using digital technology through all aspects of your care journey, whether that's online tools or devices or what have you. But technology is now at the center and at the heart of patients' journeys, and that's what we mean by omnichannel. And if you the provider cannot deliver that hybrid experience, consumers have more choices than ever before and they're willing to go to someone who can deliver that experience.

Marcus Johnson:

You point out that according to Insights Company Payments, 46% of Americans engage in both digital and in-person healthcare activities, versus 15% who said in-person only, 7% who said digital only. So again, that number 46% of Americans engaging in both digital and in-person healthcare activities.

Rajiv Leventhal:

And what's really interesting is 7, 5, 7 years ago, what was that percentage going to look like? If you count websites and maybe some basic health apps, then sure. But even with that, telehealth visits were way below 5%, closer to zero or 1%, before the pandemic. So I think that 46% figure is really significant.

Marcus Johnson:

Yeah.

Lisa Phillips:

I'd like to actually add in that there's a retail aspect to this too, just at the very beginning of patient's journey, as Rajiv's report shows a significant number of people go online to research

a condition or something. But I've just recently, I've started researching an article on how patients find doctors. And this report from PatientPop says that 77% of patients search online for doctors, either often or sometimes. And a lot of them rely on reviews from other patients and so on. So just like they go shopping for shoes or looking for restaurants, that's how they're shopping for doctors too.

Marcus Johnson:

Yeah. Yeah.

Rajiv Leventhal:

Amazon and Yelp reviews apply to healthcare. I think 60% in that report, Lisa, that you mentioned, 60% of patients said they won't even consider a doctor if they don't have an aggregate star rating of four stars online. So that's significant.

Marcus Johnson:

Wow.

Rajiv Leventhal:

Four or above.

Lisa Phillips:

Yeah, it's really is a demand for omnichannel that maybe when you say healthcare, you don't think about, but it's part of it.

Marcus Johnson:

Right. And, yeah, it's behind other industries. Rajiv, you point out in the research, only 22% of consumers believe the healthcare industry delivers a quality digital customer experience versus 60%, 61%, who said that about banking. That's from Redpoint Global. You also write that about half of US consumers use at least one, about half of US consumers use at least one, health monitoring tool. And this is according to Payments and CareCredit. What does that mean and what are people using the most when it comes to health monitoring tools?

Rajiv Leventhal:

So the two big ones are wearable devices such as your Apple Watch or your Fitbit. Those are two big examples. Smartwatches, fitness trackers like those, and health apps. And health apps can, there's hundreds of thousands of health apps on the market. We don't have to get into all the different things that they do, but many do simple things

Marcus Johnson:

List them, list them all please.

Rajiv Leventhal:

Yeah, one through 300,000. Many of them do really simple things like track what medications you're taking and set reminders for when you should take them. Fitness and calorie counters like MyFitness Pal. And then there's more condition specific ones that they do monitor your heart, your blood pressure and things like that. So mental health apps are really popular. They track mood and have programs designed for depression and anxiety. So those apps and wearables that help manage and monitor health are really increasing in usage. They're fast tracked during the pandemic and about half of consumers have one or multiple of those tools at their disposal now.

Marcus Johnson:

And so we have a 2022 US Digital Health Survey and that showed that mobile apps for health, fitness and wellness are the most used digital health tool, used more than telehealth services or wearable devices. What does that look like though across generations?

Rajiv Leventhal:

Well, as you would expect, younger patients are using them more. So when it comes to something like telehealth, older consumers are not using them as much as younger consumers, but that gap is narrowing. But for wearables and health apps, younger consumers, especially for wearables, are using them more. They're going to be more likely to have a device strapped onto their wrist while they're exercising and things like that. But when you compare generations, it does steer more towards younger consumers than Millennials and Boomers.

Marcus Johnson:

I was surprised to see-

Rajiv Leventhal:

Sorry, I should say Gen X and Boomers.

Lisa Phillips:

Yeah, I was thinking there were a few left out.

Marcus Johnson:

Yeah, Gen Z'ers, Millennials and Gen Xer's all favor apps the most. And for Boomers apps were only just behind telehealth services. So apps wins out across pretty much every generation. Rajiv, you then go on to talk about folks relationship with social media and health information. Tell me and the listeners what you found regarding how patients are using social media to find health information.

Rajiv Leventhal:

So this also varies by age, but our survey found that about half of Gen Z patients, just one generation example, use social media either all the time or often to research specific health accounts that they might follow or that are just active on social media platforms, or they want information on fitness or nutrition or how to sleep better, things like that.

Marcus Johnson:

Half of Gen Z patients. Wow.

Rajiv Leventhal:

Half of Gen Z patients. But it expands beyond that too, beyond just those general inquiries. Consumers with chronic conditions specifically are more likely to turn to social media and influencers who post videos about that specific condition than their actual doctors for medical advice. So how interesting is that, that docs aren't always the primary source for medical advice. And then consumers are tagging and interacting and messaging and engaging with healthcare professionals online. Our survey found that two-thirds either have or would consider engaging with a healthcare professional in that way on social media, so that's quite fascinating too.

Marcus Johnson:

Two-thirds, and would you assume that means that they would engage with the like, "Okay, I have a doctor, and now they want to contact me via Instagram or they want to Facebook Live

chat me or whatever, contact me however. Maybe they want to post a TikTok video that I'm going to look at." Do you think it's healthcare professionals that people know and trust? Or is it a healthcare professional I found on social media?

Rajiv Leventhal:

I would say more the latter, but probably both categories.

Marcus Johnson:

Oh, wow. Okay.

Rajiv Leventhal:

Doctors during the pandemic, and I know Lisa's done some research on this too, doctors during the pandemic became influencers. So it's not like these influencers are just random Joe Smith nobodies. They're doctors that some of them wanted to combat misinformation and create their own channels of delivering credible information. And that's created this whole world of content where people can engage and comment and respond to posts, and they might not even know that person, but they become familiar with them through the information that they're delivering through different channels.

Lisa Phillips:

And podcasts, too. I will say that a lot of doctors started their own podcasts and are continuing even post-pandemic.

Marcus Johnson:

Interesting. Because I wonder how much the credibility of the channel matters because social media is how a lot of people consume content, but there is that stigma when you've got people doing dancing videos or animal videos or any kind of silly videos associated with that medium. Does it lose much of its credibility? It doesn't seem to, at least with the Gen Z population.

Rajiv Leventhal:

Credibility is a huge element here. I know YouTube has taken some pretty important steps to validate certain channels that even healthcare professionals are posting. We want to make sure that you're licensed, we want to vet you in this way. And if you just think about in the early

days of the pandemic, if you're a doctor and a patient walked into your office and said, "This is all the information that I read online about COVID or I'm seeing on the news or that President Trump has told me. This is what I should do." If you're a doctor, you're probably getting so many of those requests for information or advice, you're saying, "Okay, I've got to do something about this and step up and deliver information in a real credible way."

Lisa Phillips:

It's either true or it's not. And, yeah.

Marcus Johnson:

Yeah. And people are looking for different types of health information though, you found, on social, different types of health information on social. Number one was general wellness, things like nutrition, weight loss, and sleep. That was 58% of people. In second place with 53% was people saying fitness. And then almost in a kind of joint third place with 36% were folks saying medical and dental care, medication, and mental health. Rajiv, another sentence that jumped out to me from this research from you was that you write almost half of physicians don't want to review their patient's wearable data. That was quite surprising to me because there is an influx of this available health related data. How come? Why would physicians say no thank you to reviewing patients wearable data?

Rajiv Leventhal:

Well, they don't want to take the time to do so. They don't trust the quality of the data that comes from the device, because it's sort of outside their purview. It's not, or what a patient is reporting to them in a one-on-one visit. It's based on technology that they might not be super familiar with. And that many of these devices don't have FDA regulation, which is a certification that doctors look towards. So those are reasons why doctors might, and I think this is in the report, they might recommend wearables to patients, "Hey, you should pick up an Apple Watch or Fitbit tracker for XYZ purpose, but we're not going to take a ton of time to review the data that it generates."

Lisa Phillips:

Yeah, and if it isn't part of the workflow, if it isn't a real remote patient monitoring device that sends the data directly into their electronic health record, the doctor can't see it easily. And so it's just sort of like, yeah, it's patient reported. "Hey, look at my Apple Watch."

Marcus Johnson:

Right.

Lisa Phillips:

"Look how many steps I took." I've had my doctor actually say to me, "Oh, I've just seen my son wave his arm around for half an hour and tell me this is how many steps he walks."

Marcus Johnson:

Right.

Lisa Phillips:

So they know that these systems can be gamed.

Marcus Johnson:

Yeah. Is this likely to change in the next, I'm going to say five years or so?

Lisa Phillips:

Probably it will.

Marcus Johnson:

Okay.

Lisa Phillips:

I think Apple's really pushing towards some real healthcare, well, FDA approvals and so on. Some people have filed, some other companies have filed patents for some things. And if they can get it into an EHR and just make it part of a visit.

Marcus Johnson:

Right, right.

Lisa Phillips:

The doctor can call up. They're very evidence-based in their clinical decisions.

Rajiv Leventhal:

They want to see science and clinical journals. There was an interesting New York Times article quickly a couple weeks ago where the Apple Watch has a fall detection capability, and what it does is if it senses that the user fell, it will wait 30 seconds and if there's no movement, it doesn't detect any movement, it will alert and call 911. And what it was doing was it was falsely triggering 911 alerts for skiers who fell. And operators were interviewed by New York Times and were saying, "We can't tell you how many false alarms we've gotten from the Apple Watch fall detection capability." And if you're a doctor and you read that, and that's just of course one capability of a wearable, but there's a trust factor there, that they have got to trust that this data and this technology works.

Marcus Johnson:

Yeah. It's not the type of thing where you're like, "Well, it's got a 20% success rate or a 50% or 80." You want it to be close to perfect before you start recommending or using this type of data to make suggestions to your patients, I'm sure. All right. So final question here, Rajiv. What are other things providers can do to deliver a higher quality digital experience for patients?

Rajiv Leventhal:

So what they can do is they can build out a digital front door strategy, which is a trend that we've been writing a lot about. And that includes offering telehealth visits, offering the ability to do a lot of things online before a visit, such as self-scheduling and filling out pre-visit questionnaires, pay bills online. That's a big one that consumers want to do. And that digital front door strategy will show consumers that you want to make life more efficient for them.

We talked about reviews. I think physicians and the healthcare provider should be pretty active online in responding to reviews, even ones that express a bad experience because patients will see that you care and are transparent and are engaging.

And then be active on social media. We mentioned patients are online, they're on social media all the time. Meet them where they are, be accessible, answer questions, establish a credible social media account on YouTube through these verification ways. And I think that will do a lot as well to meet patients on their preferred platforms. And whether that's Facebook for older consumers or Instagram or TikTok for younger ones.

Marcus Johnson:

All right. Well, that's all we've got time for for the lead. Time, of course, for the Halftime Report.

All right, time for some takeaways. Rajiv, I'll start with you. Takeaway from the first half of the show where we talked about the digital patient journey.

Rajiv Leventhal:

You can't avoid technology and you can't avoid how much patients use technology in their healthcare journey. So if you don't embrace it, a disruptor, a consumer obsessed disruptor, who might not have the healthcare expertise but they have the customer expertise, will come in and snag your perspective patient or your existing patient from you because that's happening.

Marcus Johnson:

Lisa, how about for you?

Lisa Phillips:

Well, I was just going to respond almost to Rajiv's last statements. Social media is exhausting for people who don't do it regularly but then are suddenly required to. I think on a practice level, it's more doable than to have individual doctors, on social media perhaps.

Marcus Johnson:

Yeah.

Lisa Phillips:

But I think definitely look to the reviews that you're getting. And other research I've said is put the doctor's pictures up. That will get more attention and build more trust, just a doctor's picture.

Marcus Johnson:

Excellent points, folks. All right. That's it for the lead time. For the second half of the show today, In Other News, some people are using patients health data for ad targeting and why Best Buy partnered with Atrium Health

Story one. Online therapy service BetterHelp pays an \$8 million fine for sharing customers mental health data with Facebook and Snapchat for ad targeting purposes writes Insider Intelligence's Senior Director of Marketing, Retail and Tech Briefings, Jeremy Goldman. Lisa, you know that this follows the FTC fining GoodRx 1.5 million earlier this year, which we talked about on the show. And warning Amazon, the FTC, warning Amazon and OneMedical against using patient health data for ad targeting after Amazon bought primary care company OneMedical. But Lisa, these single digit million dollar fines don't really feel like much of a deterrent. What do you see happening from here on out when it comes to patient's health data being shared with advertisers?

Lisa Phillips:

Oh, it's probably still going to be shared, until the FTC comes down on them. But one sentence that in the Amazon OneMedical note, FTC cited them for merging without going through the antitrust process, but the FTC just said they're going to use what they consider a reasonable consumer would consider to be a deception as their guide for what constitutes a violation of data health privacy rather than the HIPAA expert, which is what most people point to. So it's on the website that matters, not what's buried in an online privacy policy for the FTC.

Marcus Johnson:

Yep.

Lisa Phillips:

If companies that were HIPAA compliant or it's 100% confidential, "We won't share it with third parties unless you consent." And then lower down says, "And that means if you clicked on our accept all cookies." They're looking at that for sure.

Rajiv Leventhal:

Okay.

Marcus Johnson:

Story two. Lisa, you recently wrote an article outlining that consumer electronics company Best Buy partnered with Atrium Health to offer for hospital at home care to Atrium's patients, Atrium Health being a 40 hospital not-for-profit health system with over 1,400 clinics and care centers across North Carolina, Alabama, and Georgia. But, Rajiv, why is Best Buy, a

company known for selling TVs and laptops, partnering with Atrium Health, and what's the significance of all of this?

Rajiv Leventhal:

So Best Buy is providing the technology backbone and support to power hospital at home programs, which are becoming increasingly popular.

Marcus Johnson:

Got it.

Rajiv Leventhal:

Best Buy sells technology that allows for remotely monitoring patients. And their role in healthcare is becoming a little clearer now. They're not just a remote patient monitoring vendor, but they're leveraging their Geek Squad expertise, their tech support Geek Squad expertise to go into patients homes, set up these remote patient monitoring devices, and then educate both consumers and providers how to use them. And that's really interesting because they have that kind of dual expertise by providing the tech backbone for hospital at home programs, but also this tech support if something goes wrong. And that's a big part of remote patient monitoring that doesn't get talked about as much, but Atrium Health is a huge health system. They're now part of Advocate, as you mentioned, the broader health system is almost 70 hospitals, and that is a big customer, big, big, customer, to get on board. Best Buy's got some other big health system clients as well.

Marcus Johnson:

Yeah, and it's a good point because, Lisa, from your piece you note that Atrium Health merging with Advocate, Aurora Health, Rajiv that you mentioned to form Advocate Health, that would be the fifth largest not-for-profit health system in the US. So it's a significant player. Best Buy been playing in this world for a little bit. They bought hospital at home platform Current Health just two years ago.

That's all we've got time for this episode. Thank you so much to my guests. Thank you to Lisa.

Lisa Phillips:

Oh, thank you, Marcus. It's been lovely.

Marcus Johnson:

Yes, indeed. Thank you to Rajiv.

Rajiv Leventhal:

Yep, same to you, Marcus. Thanks for bringing me on.

Marcus Johnson:

Of course. Of course. And thank you to Victoria who edits the show, James, who copy edits it, and Stuart who runs the team. And thanks to everyone for listening into the Behind the Numbers Daily, an eMarketer podcast made possible by Meltwater. You can tune in tomorrow to hang out with Sarah Lebow, host of the Reimagining Retail Show, where she'll be speaking with analysts Zach Stambor, and Senior Director of Briefings, Jeremy Goldman, all about some of the main themes and takeaways from retailers' Q4 earnings.