

Health Care Consumer Trust Survey



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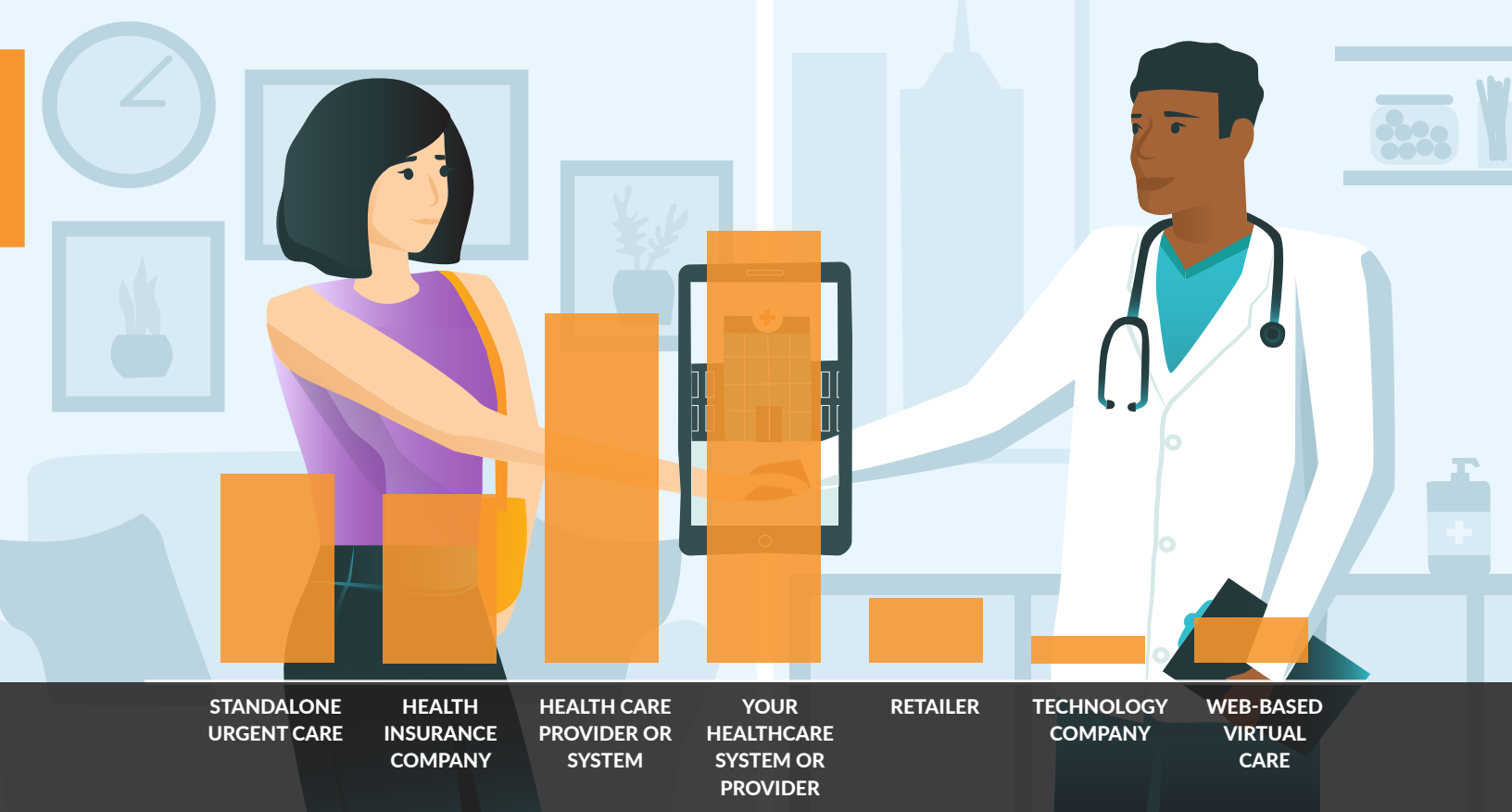
Executive Summary:

A tremendous opportunity exists for health care systems and providers to gain competitive advantages by delivering convenience and ease of access to care by adopting innovative care delivery options for their patients.

Despite that consumers want fast, convenient, high-quality health care, they don't trust big technology companies with their health information. In fact, they overwhelmingly trust their health care information and care delivery with their own providers and hospitals over technology companies. As consumers are taking on more responsibility for their health care, it is up to their health systems and providers to meet their evolving expectations for innovative and convenient access to care. While consumers trust their own doctors to provide care and handle their personal information responsibly, many are almost as trusting of other providers and health systems.

We conducted this survey to learn more about consumer attitudes around trust, health care delivery, and personal information. Responses reveal that consumers do not trust big technology companies with their health care delivery or information. In fact, they continue to put more trust in their own health care providers and hospitals. Participants in our study are both young and old, with 50% of the population landing on either side of 45. They are also split roughly between men and women, with just an edge more females responding, and they come from across the United States.

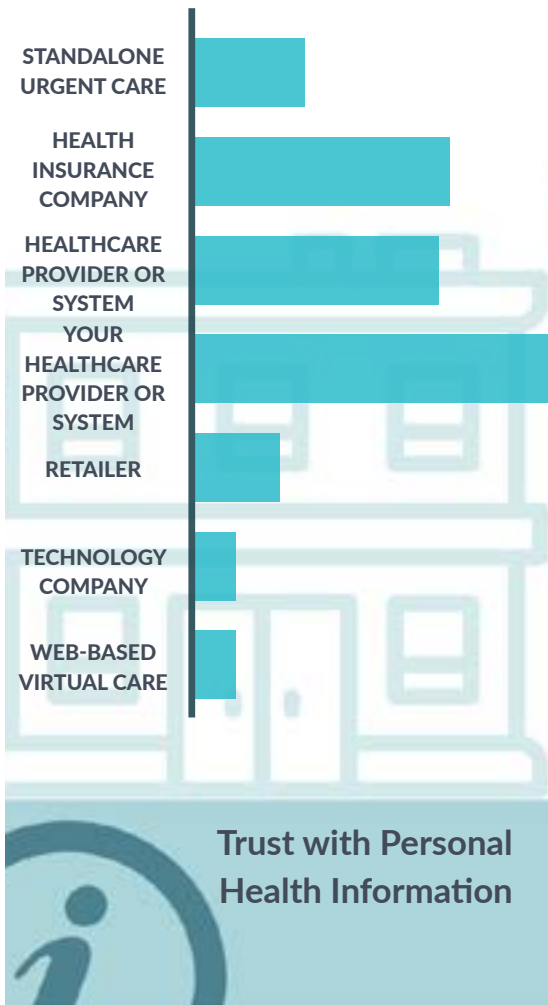
The data signals a trend that likely extends to the larger population and indicates a strong connection between patient and physician still exists. This presents an enormous opportunity for health care systems and providers to offer convenient and trustworthy health care solutions for their patients, who are more likely to entrust their health and information with them.



Providing Care

- Consumers (67%) still prefer their own doctor or hospital to provide their health care over urgent care (29%) and retail solutions (10%).
- Although consumers overwhelmingly trust their own provider and hospital to provide health care, over half of them trust any provider or hospital to provide care.
- Consumers put three times more trust in urgent care centers than retailers like Walmart or CVS for health care services.
- Only one in four patients trust their insurance companies to provide their health care, although nearly half of them do trust insurance companies to handle their personal health information.
- Virtual care is growing in popularity, with 22% of respondents reporting they have received web-based health care.

Personal Information

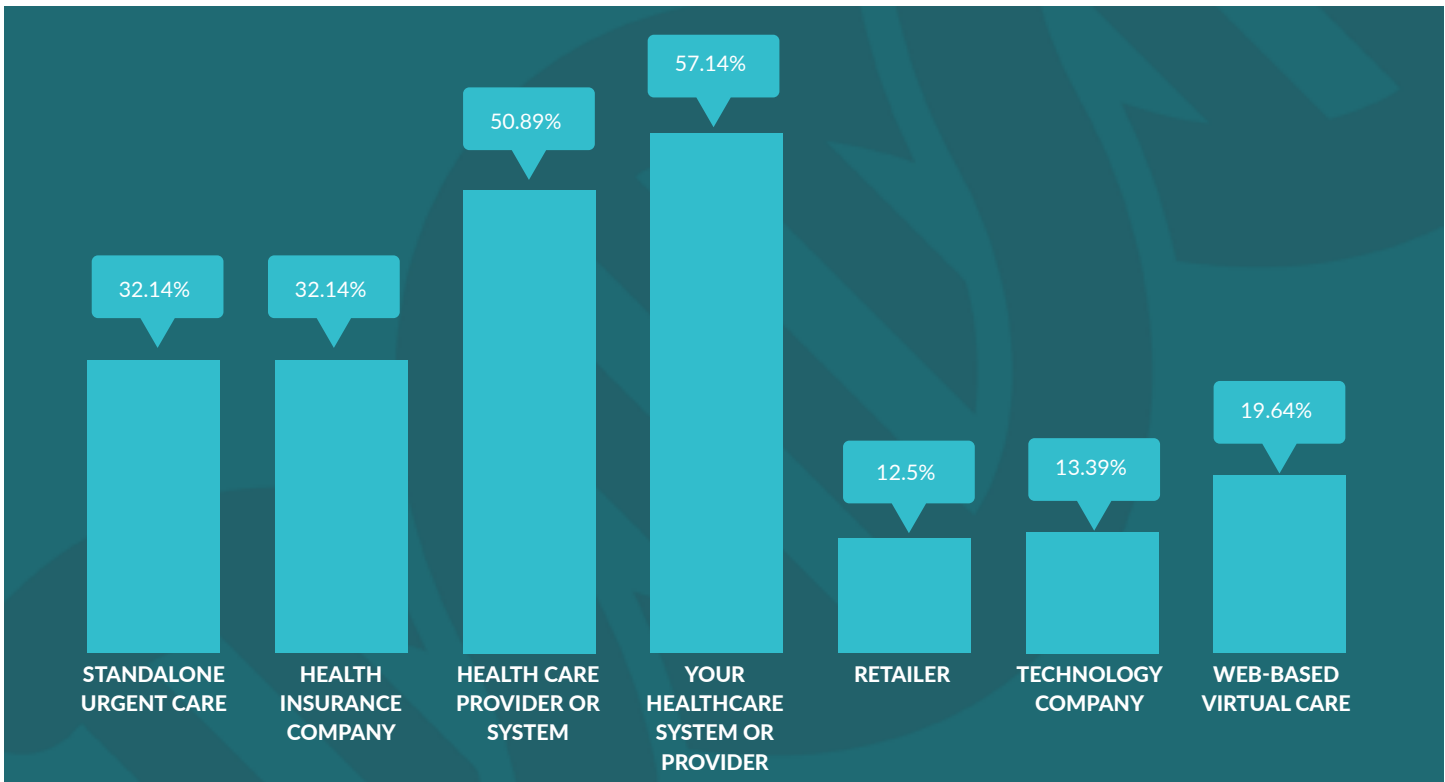


- Virtual care patients still put more trust in their own health care providers handling their health information, nearly half of them trust any doctor or health system to provide care
- Consumers trust their doctors, hospitals and insurance companies with their personal information more than they trust technology companies
- Although consumers overwhelmingly trust their health information with their own provider and health system, nearly half of them also trust any provider or health system
- Consumers also are wary of retailers handling their personal health care information, with merely 16.5% expressing trust

	Who do you trust with your health care information?	Who do you trust to provide your health care?
Your health care system or provider	68.91%	66.79%
Health insurance company	49.71%	26.30%
Health care provider or system	47.79%	54.13%
Standalone urgent care	21.88%	29.37%
Technology company	8.25%	4.41%
Web-based virtual care	8.06%	7.10%
Retailer (e.g. Walmart, CVS)	16.51%	9.98%

Virtual care is growing in popularity

Have you ever used web-based virtual care for your minor illness or injury?	
Yes	22%
No	78%



Of those who have received virtual care, they most trust their personal information with:	
Their health care system or provider	57.14%
Health care provider or system	50.89%
Standalone urgent care	32.14%
Health insurance company	32.14%
Web-based, direct to consumer virtual care	19.64%
Technology company	13.39%
Retailer (e.g. Walmart, CVS)	12.5%

Respondent Demographics



54.51% female

- 50% under 44
- 17.08% 18-29
- 32.44% 30-44
- 40.12% 45-60
- 10.36% over 60

Household Income

- 32.24% \$50,000 - \$99,999
- 19.19% \$50,000 - \$74,999
- 23.81% > \$100,000
- 6.72% did not respond to question



85.8% are the primary healthcare decision maker in their family.

Methodology

Bright.md commissioned a poll to learn more about today's healthcare consumer opinions around trust and personal healthcare information. Using an online polling service, Bright.md analyzed responses from 521 participants living in the United States over the age of 25. Fifty-five percent of the respondents are female, 50% are under the age of 45, 75% have an annual household income exceeding \$50,000, and 24% have an annual household income exceeding \$100,000.