

**Harris Interactive/ARiA Marketing  
Healthcare Satisfaction Study**

**Final Report**

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## Introduction

Harris Interactive/ARiA Marketing recently conducted an in-depth investigation of two major, related healthcare issues: patient-physician communication (a key factor in patients' satisfaction with their healthcare) and the potential for new Internet and other technology-supported services to improve the communication process. Research was conducted in two phases during September 2000. The first phase was an online survey over a five-day period of over 1,000 U.S. healthcare consumers over 18 years of age. The second phase, conducted two weeks after the survey, was an online focus group of four patients and five physicians. In a general discussion of these issues, the focus group participants responded to the survey results and offered their comments and insights into how the Internet and other technologies could affect the healthcare experience.

## Key Findings

### ***The current doctor's visit is inadequate for both physicians and patients***

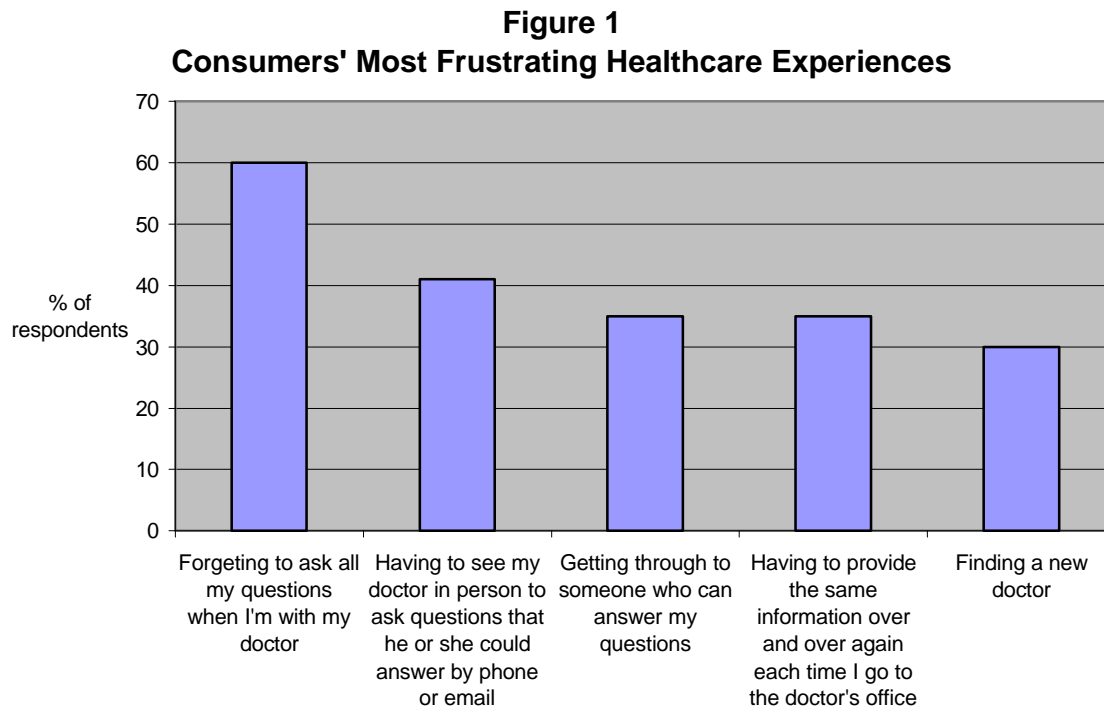
A major focus of the research was the direct interaction between doctors and patients. The doctor's visit, the main means of interaction between the doctor and patient, has changed dramatically over time. Fifty years ago, house calls were not uncommon, and the physician, often considered a member of the family, was familiar with almost all aspects of the patient's life. This scenario is far from today's reality, in which the doctor's visit has been reduced to 15 minutes or even less, largely as a result of managed care influences. Except for the occasional phone call, all communications between doctor and patient usually take place during the office appointment. This puts stress on both the patient and physician to make sure they ask and answer all questions during that extremely narrow window of opportunity.

Focus group physicians spoke of their frustrations about the shortened patient visit. When asked if they could be granted any wish that would enhance the physician-patient relationship, one physician responded, "I would wish for more time to spend with my patients, and I would wish that insurance companies would have no say in how I manage the care of my patients." Patients were also frustrated with the current state of affairs, and want their physician to be "caring; not

Such abbreviated face time with their physicians combined with the inherent anxiety associated with a doctor's visit means patients are not getting what they need: the attention and caring of their physicians, the in-depth information they need to properly care for themselves, and, in general, the reassurance of a strong physician-patient bond. Questions remain unanswered, information gets forgotten or confused, and patients often leave visits frustrated, unsure — even angry.

### ***Patients are frustrated by their current healthcare experiences***

Figure 1 illustrates the survey respondents' top five most frustrating healthcare experiences.



Source: Harris Interactive/ARiA Marketing, Inc., 2000

Based on the survey results, over 60 percent of online consumers are frustrated by not remembering to ask all their questions when they are with their doctors. Some try calling their physicians, resulting in the scenario described by one focus group patient, who explained, “I’d prefer to email my doctor with a question and get an email back from him rather than phoning and talking to the receptionist who leaves a message for his nurse who calls me back and then asks the doctor, then calls me back with his response, and if I have a question, she has to call back again.”

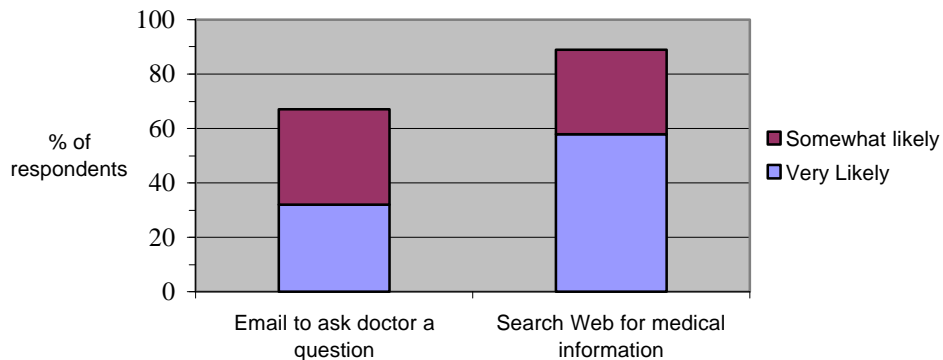
Some patients have to schedule an appointment with their physicians to get their questions answered; the survey indicated that 41 percent of online consumers — as time-crunched as their physicians — are frustrated about having to do so when they could ask the question by telephone or email. As one focus group patient commented, “It’s a busy world. The doctors’ complaints are that they don’t have enough time to deal with added responsibilities. I too am a professional, though not in the medical profession. My time is also very valuable. It would be nice to not have to take time off of work to get a referral for a known condition, for example.”

Patients want their doctor to provide them with all the information they need to be informed participants in their healthcare. However, the doctor visit is increasingly seen as an inefficient way to communicate with providers. Getting answers to their questions is a key communications problem for patients, and one they see that could be remedied if their physicians and health plans made greater use of the Internet.

**Consumers are getting educated**

Consumers are actively seeking information about healthcare and are using the Internet as a major tool in this effort. Of all respondents, 76 percent said they have searched the Internet for healthcare information, and 39 percent said they use the Internet to search for healthcare information at least once per month. When asked what information sources they would use, assuming all these sources were available, consumers indicated they would use both information from their doctor and information from the Web (see figure 2).

**Figure 2**  
**Consumers' Sources of Healthcare Information on the Internet**



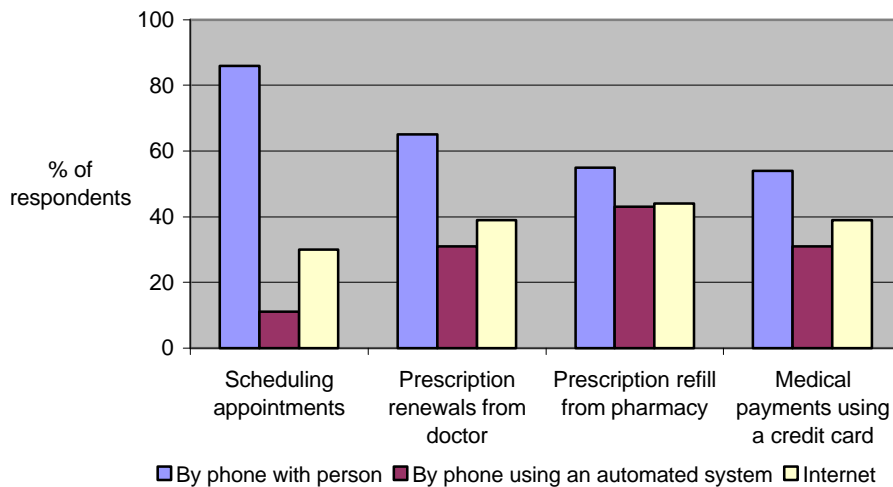
Source: Harris Interactive/ARiA Marketing, Inc., 2000

Focus group physicians expressed skepticism about the quality of information from sources other than themselves, particularly if managed care organizations sponsor those sources of information. “I could not be responsible for medical advice given to my patients by anyone else other than myself,” said one physician. Another thought the idea was good in theory but might have some problems in practice: “The problem is that there is often no one right or good answer. You run into potential conflicts of what [you may] tell the patients versus what the faceless, unknown *email* doctor/professional says. To whom [does the patient] listen?” Medical information should come from the doctor’s office, according to the focus group physicians, not from chat rooms or Web sites.

**Patients want both “high tech” and “high touch” systems**

Neither the survey respondents nor the focus group patients advocated a completely Web-based approach to managing their care. Some combination of “high tech” and “high touch” is clearly optimal. For example, according to the survey, over 80 percent of online consumers prefer to schedule appointments by phone with a person, although they are somewhat more likely to want to use the phone than the Internet for requesting prescription refills and making medical payments via a credit card (see figure 3).

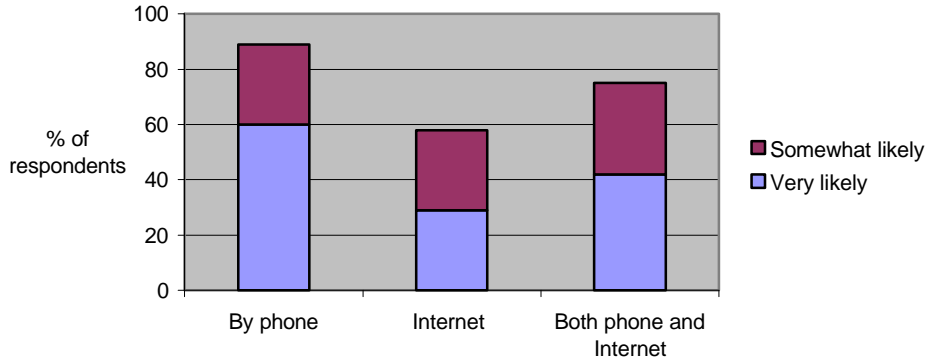
**Figure 3  
Consumers' Preferred Technology for Performing  
Select Healthcare Activities**



Source: Harris Interactive/ARiA Marketing, Inc., 2000

In addition, 89 percent of online consumers would use a nurse triage service to help them manage a chronic illness, and they would like the service available via the phone and the Internet (see figure 4). Patients would also use a nurse triage service to get immediate answers to questions after normal office hours, according to the survey.

**Figure 4**  
**Consumers' Choices for Accessing Nurse Triage Services to Manage a Chronic Illness**



Source: Harris Interactive/ARiA Marketing, Inc., 2000

Survey results also indicated that 83 percent of online consumers would like their lab tests to be available online, and 69 percent would like online charts for monitoring their chronic conditions over time (see figure 5). Focus group physicians expressed serious concerns with this idea, since small variations in test results would likely require explanations and increase patients' anxiety. However, the patients felt that delivery of test results via the Internet is no different than delivery of test results through the mail. Both physicians and patients agreed that sensitive test results are best communicated in a face-to-face meeting.

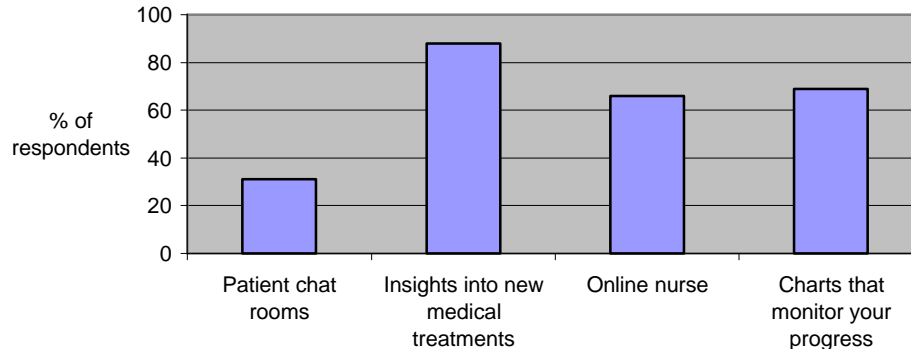
**Figure 5**  
**Consumers' Desire to Use Select Internet-Based Healthcare Applications**



Source: Harris Interactive/ARiA Marketing, Inc., 2000

Other highly desirable applications include insights into new medical treatments (see figure 6): 88 percent of adults online said they would like to use the Internet to gain insights into new medical treatments, and 50 percent said they would use this service two or more times per month.

**Figure 6**  
**Consumers' Interest in Other Internet Healthcare Services**



Source: Harris Interactive/ARiA Marketing, Inc., 2000

### ***Consumers want their doctors to get online***

Patients want their physicians to get online, according to both the survey results and the focus group discussion. Online access to physicians could efficiently extend the doctor visit in a variety of ways. According to the survey, 67 percent of online consumers would likely use email to ask their doctor a question if the option were available to them. Patients also considered the ability to communicate from any location at any time to be highly desirable.

Consumers also want their doctors to start using automated systems to help them better manage their care. Based on the survey results, 84 percent of online consumers want to receive electronic alerts specific to their medical histories from their doctors, such as messages to schedule an annual physical or follow-up visit or to get a flu shot (refer back to figure 5). In addition, 80 percent of online consumers would like to receive personalized, relevant medical information online directly from their physician after an office visit, reflecting the already high rate of Internet use among healthcare consumers for researching medical information. As one patient stated, "I'd prefer to have more frequent visits and not have to rely on phone calls ... but it takes weeks to get an appointment and sometimes I can't wait that long for an answer to a question." The consensus among patients and physicians was that email is acceptable for communicating general information and, in some cases, test results (e.g., normal results).

Nonetheless, despite the Internet's clear efficiencies in certain situations (e.g., prescription refills, HMO referrals) and certain innovative uses, physicians remain steadfast in their belief that the Internet is too impersonal a communication mechanism and that only face-to-face communications with their patients will build the effective relationships that lead to quality care. Rather than the supplemental communication tool that healthcare consumers view the Internet to be, focus group physicians carried its use to an extreme, believing the patients intend the Internet to replace other forms of communication. "I'm stunned that people don't want to really see or reacted one physician. Another physician responded, "The Internet, although it is a wealth of information, will make medicine less personal." Finally, one physician summarized the sentiments of the others in the focus group this way: "I think it would be a shame to manage a patient's healthcare on the Internet and lose the human interaction and contact. How can you build trust in your physician over a computer? One of the basic things we learned [in medical school] was human touch and caring. I find it difficult to believe that that or some of that won't be lost over the Internet."

Physicians are also concerned about the impact of email and other Internet system on their workflow. "Email can also place another burden on the already time-crunched professionals," said one focus group physician. Another conceded, "Email may allow us to communicate with patients in a more precise manner and at various times during the day. However," the physician continued, "it will place additional demands on our time and perhaps open other sources of liability. It may also give patients a false sense of security to the point they feel they do not need to make appointments." A third responded, "One problem I face is the sheer number of phone calls I have to return every day in a timely manner. To have regular email to check may shorten my time to get my work done."

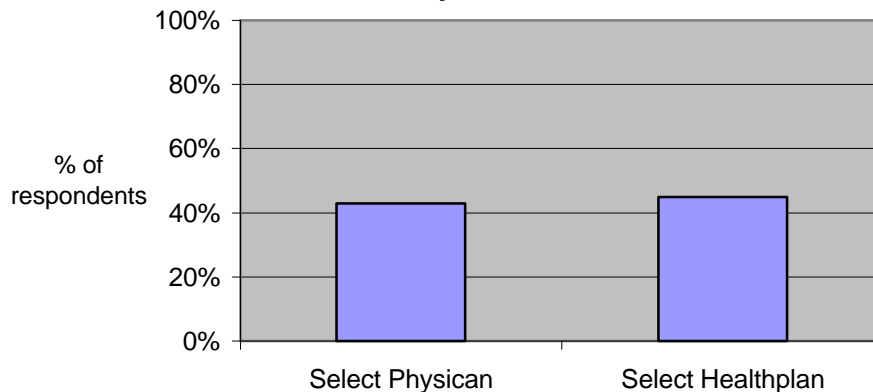
### ***Consumers are factoring Internet-based systems into their selections***

According to the survey, 57 percent of online consumers now feel the Internet can help reduce their frustrations with healthcare. Some physicians are resistant to the idea of using Internet-based tools to communicate with their patients, fearing the erosion of the traditional doctor-patient relationship. But this relationship, now driven by cost pressures from managed care, has changed. Focus group patients complained that their doctors talk down to them, don't take the time to listen to their questions, and are more influenced by insurance companies than the patients themselves. And the physicians' complaints were similar: They don't have the time to spend with their patients, and insurance companies are trying to dictate the standards of care.

Solutions to the problem, however, vary from patients to physicians. Patients are looking for new and better ways to access the information that will make them informed participants in the provision of healthcare. Physicians are wary of the Internet and the possibility that their already-tight schedules will be even more stressed with the addition of technological forms of communication with their patients.

However, not only are patients open to using the Internet, they are beginning to look for physicians and health plans that do. Of the online survey participants, 43 percent are likely to choose their doctor based on the availability of Internet-based systems, and 46 percent said it was important that their doctor be accessible via the Internet. The same applies to payors; 45 percent of adults online are likely to select their health plan based on availability of Internet systems (see figure 7).

**Figure 7**  
**Consumers's Willingness to Make a Selection**  
**Based on the Availability of Internet-Based**  
**Systems**



Source: Harris Interactive/ARiA Marketing, Inc., 2000

When the focus group was asked to comment, the consensus was that this was not the only or even the top criterion in selecting a doctor. However, if two physicians had similar qualifications, whether either offered patients Internet communication tools would weigh into the final decision. As one focus group patient put it, "It would just be an added advantage, like a polite office staff or a conveniently located office." Another commented, "The world is becoming more advanced. My career depends on it. I choose to use services that use the technology that I use as part of my life."

Once again, the physicians seemed to take the idea to the extreme, to the point of misunderstanding the point. One physician responded, "Judging the competency of a physician based on a Web site or use of the Internet is ludicrous." He continued, "Perhaps the next time a patient needs an angioplasty, the Internet can provide this service. Perhaps the Internet can also give a patient the choice of which stent he or she will receive during the angioplasty. Also, I hope the Internet can be available at 3 a.m. to perform the procedure."

As one focus group participant said, "I don't want my medical care from a machine, but if my doctor could communicate with me sometimes via email in a more timely fashion than waiting for a phone call/appointment, that would be an advantage.... It would still be his/her medical

## Conclusion

The findings of this survey have far-reaching implications for all members of the healthcare community. In particular:

### ***Physicians and health plans need to listen to patients' needs***

Patients want to partner in their own healthcare with their physicians and health plans. This does not mean they want to replace their doctor with information from the Internet or other services. It means they want their healthcare providers to use both in-person and electronic communication tools to keep their patients informed. Consumers want healthcare providers and payers to provide the same convenient, personalized service they receive from other organizations, whether job related, retail, or even government agencies. Most of these organizations are using the Internet to expand their services and to build a more personal relationship with their customers and constituencies. Patients want these same tools applied to healthcare.

### ***Patients must continue to demand tools for managing their healthcare***

The healthcare system will not change until providers and payors feel consumers' desires economically. Consumers must start asking their employers, their doctors, and their health plans when they will implement Internet-based systems for their patients. Patients are beginning to seek out providers and payors who use this technology and are factoring the availability of Internet applications into their selection process. Providers and payors must get ahead of this trend now and differentiate themselves by providing systems and tools that meet consumers needs.

### ***Technology vendors must facilitate acceptance with all constituents***

Responding to their patients' pressures, doctors will be looking for vendors able to implement Internet-based systems, but the success of the technology ultimately rests with physicians. Solutions must be designed to enhance the workflow of the doctor's office — or at least not to disrupt it. Vendors must be prepared to prove that their solutions will benefit doctors without adding extra work or cost. Vendors must also ensure the total security and privacy of patient information, since confidence in the security of patient data is essential to the long-term acceptance of Internet solutions.

## About Harris Interactive

Harris Interactive (Nasdaq: HPOL), the global leader in online market research, uses Internet-based and traditional methodologies to provide its clients with information about the views, experiences, behaviors and attitudes of people worldwide. Known for its Harris Poll, Harris Interactive has over 40 years experience in providing its clients with market research and polling services including custom, multi-client and service bureau research, as well as customer relationship management services. Through its US and Global Network offices, Harris Interactive conducts research in more than 80 different countries, in more than 30 different languages. Harris Interactive uses its proprietary technology to survey its database of more than 7 million online panelists. For more information about Harris Interactive, please visit the company's Web site at [www.harrisinteractive.com](http://www.harrisinteractive.com). EOE M/F/D/V

## About ARiA Marketing

ARiA (Analysis, Research, Insight, Advice) Marketing was founded to provide healthcare vendors and consultants with strategic marketing and research services. ARiA's Marketing Services include creating marketing plans, messaging, and implementing high-impact marketing programs. ARiA's Research conducts independent and customized research, with special focus on the rapidly emerging eHealth market. For more information about ARiA Marketing, visit the company's Web site at [www.ariamarketing.com](http://www.ariamarketing.com).

## About iMcKesson

iMcKesson LLC, a subsidiary of McKesson HBOC, Inc., is a healthcare company dedicated to connecting healthcare and improving lives. The company provides a comprehensive, industry-leading platform of medical management services and tools to help payors and providers better manage the cost and outcomes of medical care, and a comprehensive suite of Web-based clinical, administrative and connectivity solutions for physicians. iMcKesson's modular solutions are based on decades of experience in healthcare services and information technology serving thousands of customers and millions of patients. The company is headquartered in San Francisco with operations throughout the United States and in Australia, New Zealand and the United Kingdom. For more information about the company, visit the iMcKesson Web site at [www.imckesson.com](http://www.imckesson.com).

### **For more information, please contact:**

Quentin Homan, Research Director

ARiA Marketing, Inc.

One Gateway Center, Suite 507, Newton, MA 02458

617-332-9999, x204 — [qhoman@ariamarketing.com](mailto:qhoman@ariamarketing.com)