As the new year approaches, healthcare providers are looking back on progress made thus far while also preparing for potential opportunities and pitfalls ahead. They're faced with a myriad of environmental forces—from legislation, to continually emerging and often disruptive technology, to shifting consumer and patient demands. Consumerism is a major disruptor in the industry and nontraditional entrants in the market are further fueling this trend. In these Essential Insights we're exploring some examples showcasing the impact of consumerism thus far and how it will likely shape the healthcare industry in 2019.

What is Healthcare Consumerism?

Healthcare consumerism refers to the growing trend for patients to want more control—and more choices—in making healthcare decisions. Increasingly, this is occurring outside the typical hospital or clinic healthcare settings; services through retailers like CVS, Walgreens and Walmart are now commonplace. Other options are also emerging through digital technology and healthcare-related apps.

[Research from McKinsey & Company](#) documents this trend. Consumers who reported using retail clinics grew from 9 percent in 2013 to 24 percent in 2017 according to McKinsey's 2017 Consumer Health Insights (CHI) Survey. In these settings, consumers sought care for everything from immunizations to lab tests to care for minor illnesses. Cost is a big driver for seeking alternative sources of care, but so is convenience.

In addition to seeking face-to-face care in retail settings, consumers are increasingly adopting digital technology of various sorts to address healthcare needs, according to McKinsey. About 70 percent of consumers prefer digital solutions over phone or in-person access across a wide range of needs:

- To pay insurance bills (79 percent)
- To monitor health metrics (77 percent)
- To search for a doctor (73 percent)
- To order prescription drugs/refills (71 percent)
- To check health information (69 percent)
- To shop for a health plan (68 percent)

While only 49 percent of respondents indicated that they had used technologies offered by their health insurers, that percentage is predicted to grow. Some providers, recognizing this trend and the potential it holds are already moving aggressively in this direction.

Leading Providers Take the Plunge

Piedmont Health, the largest provider in Georgia with 11 hospitals that treat 2 million patients annually is one of many healthcare organizations that provide patients with various technological tools to address the demands related to healthcare consumerism. The system allows patients to self-schedule appointments and has made this feature in their system a significant priority. Their results indicate the offering is not only popular, but is drastically increasing the number of patients seen. Piedmont is averaging about 13,000 online appointments a month. About 40 percent of these are from new patients [according to an article in HealthLeaders](#).

What's so groundbreaking about this move? This direct and on-demand access to physicians (more specifically, their calendars) has historically been an elusive and somewhat challenging feat, and this personalization of care is taking off as other healthcare organizations look to offer similar options in 2019 that go even beyond offering the option to *request* an appointment online.

Today, consumers can self-diagnose through digital symptom checkers offered by both non-traditional and traditional market players—[WebMD](#) and [Mayo Clinic](#) are just two examples of online sites offering this option. Tools like [Fitbit and Apple Watch](#) allow consumers to track vital signs and monitor physical activity and sleep patterns.

Still, the pace of adoption is slow according to a [Kaufman Hall survey](#) of 200 hospital and healthcare executives. While 90 percent indicated that improving the customer experience was a high priority (up from 30 percent in 2017), only 8 percent of respondents were rated tier 1 performers for aggressively pursuing consumer-centric strategies and only 23 percent are tier 2 for piloting consumerism initiatives.

Where Should Healthcare Leaders Focus in 2019?

According to Deloitte's recently released [2018 Global Health Care Outlook report](#), healthcare organizations will need to sharpen their focus on the cornerstone of health care: consumers and patients. The report says: "Health care organizations should consider extending their focus beyond price and quality of care to creating a customer-centered relationship. Health care has an opportunity to learn from other industries—consumer products, financial services, and hospitality, as examples) how to more effectively target, serve, communicate with, and retain customers and patients."

Personalization of care is consumers' number one priority related to their health care, reports Deloitte, and healthcare organizations are focused on three ways to meet patients where they are and help achieve the level of care patients and consumers are craving and

demanding:

- Leverage social media to improve the patient experience. [Millennials, for instance, are increasingly turning to the internet and social media](#) for healthcare advice from both peers and professionals.
- Telehealth holds special appeal in underserved, rural areas, is being used for everything from monitoring congestive heart failure and other chronic care patients to addressing a growing need for behavioral health services around the country.
- Virtual or augmented reality which can be used in patient education and to help relieve anxiety for patients scheduled for surgery or other procedures by allowing them to preview these interactions.

Consumers also are demanding transparency in pricing expecting that, just as with their retail transactions, they should be able to know upfront how much a procedure will cost. Federal regulations are responding to the demand—providers are concerned: [92 percent of healthcare providers responding to a recent survey](#) indicated a concern about how charges will be perceived by the public in response to CMS's price transparency rule, for instance.

As 2018 draws to a close, healthcare organizations are recognizing the need to shift traditional provider-driven practices to provide consumers with the options, convenience and transparency they are demanding. The pressure is on and the players are changing, but better serving patients will continue to be the cornerstone to achieving value-based care success.