



What Do Consumers REALLY Think About Health Care Disruptors?

Rob Klein, Founder & CEO, Klein & Partners

Dean Browell, PhD, Chief Behavioral Officer, Feedback

Laila Waggoner, VP, Strategic Partnerships, Core Health



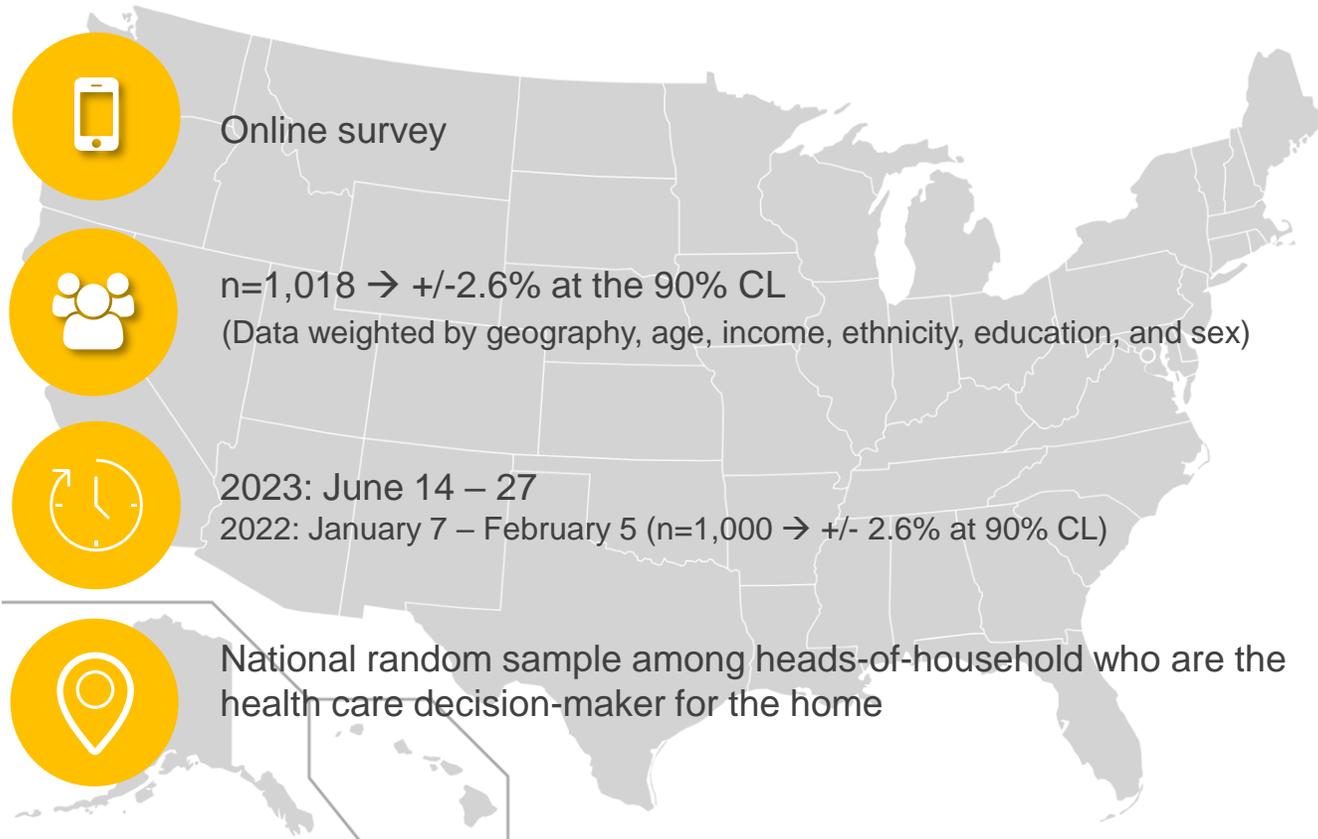
Learning Objectives

- Review data on consumer and provider attitudes and perspectives on disruptors vs. traditional
- Adjust perceptions about these attitudes and perspectives by exploring original research and implications
- Interpret insights from this data and consider how they might affect response and messaging

Disruptors are having a big impact.

**What do consumers say?
And how do they feel?**

National consumer survey



Digital ethnography

National study of online behavior and discussion



Audience segments:

- Consumers
- Patients
- Physicians
- Nurses
- NPs
- PAs
- Pharmacists
- Med Students

Audience roles:

- Participant
- Endorser
- Lurker

The biggest disruptor of them all ...?

COVID-brain is still impacting ~3 in 10 adults (with greater impact on Parents, Millennials and Gen Z)

Memory

I am having trouble remembering simple things

25% (27% in 2022)

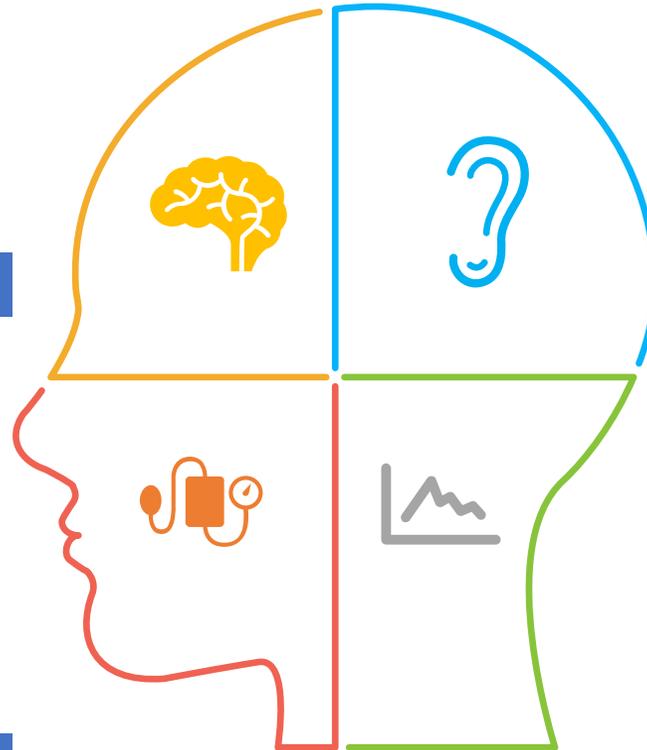
Parents: 37%, Gen Z: 33%, Millennials: 34%

Patience

I find myself losing my patience easier than before

30% (33% in 2022)

Parents: 37%, Gen Z: 44%, Millennials: 35%



Attention Span

I find it harder to concentrate and pay attention to things

29% (29% in 2022)

Parents: 37%, Gen Z: 44%, Millennials: 41%

Brand Linkage

Even if I remember an ad, I find it harder to remember who the company was

33% (34% in 2022)

Parents: 44%, Gen Z: 44%, Millennials: 44%

Q70: For the next question, please agree or disagree with each statement as it applies to how you feel now compared to a couple years ago before COVID. **Note: % Strongly Agree/Agree shown.**

COVID cognitive challenges impact marketing

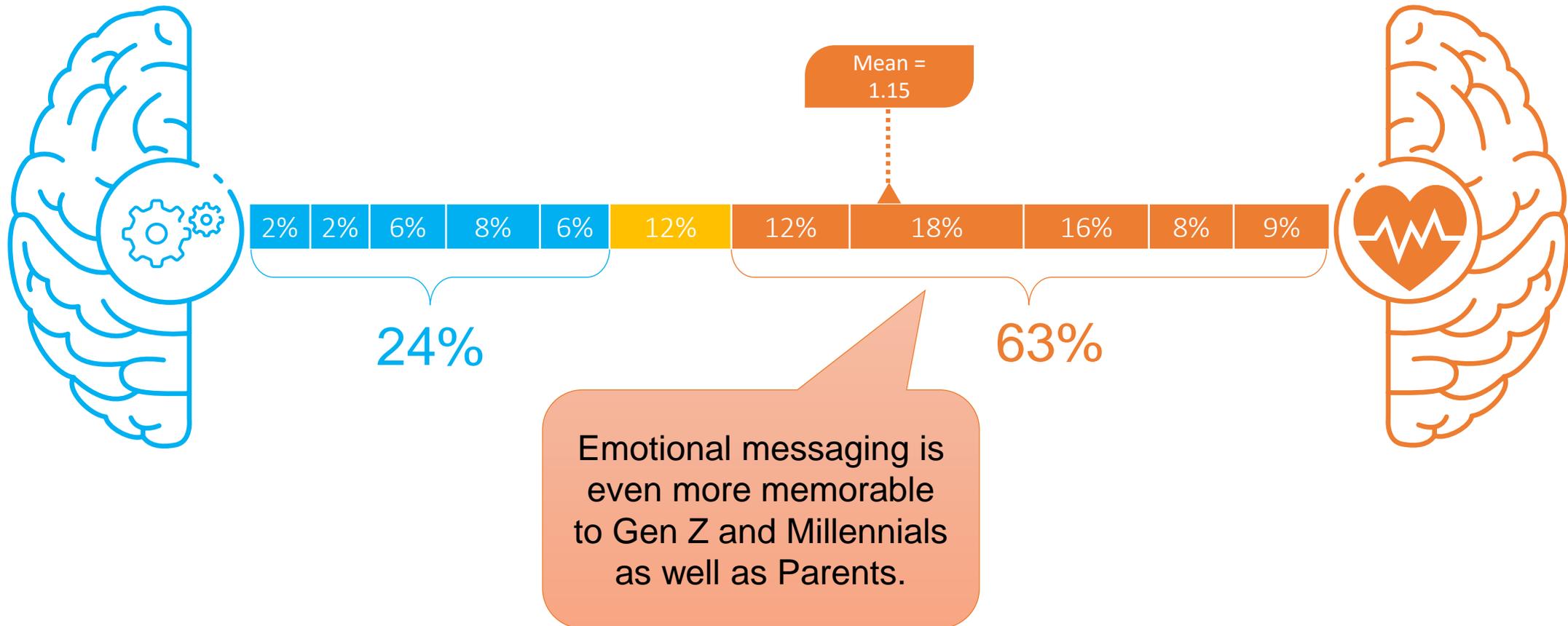


Messaging must be...

1. Simple
2. Engaging
3. Repetitive
4. Brand must be the star



How do we market to COVID-brain? → Talk to the heart!



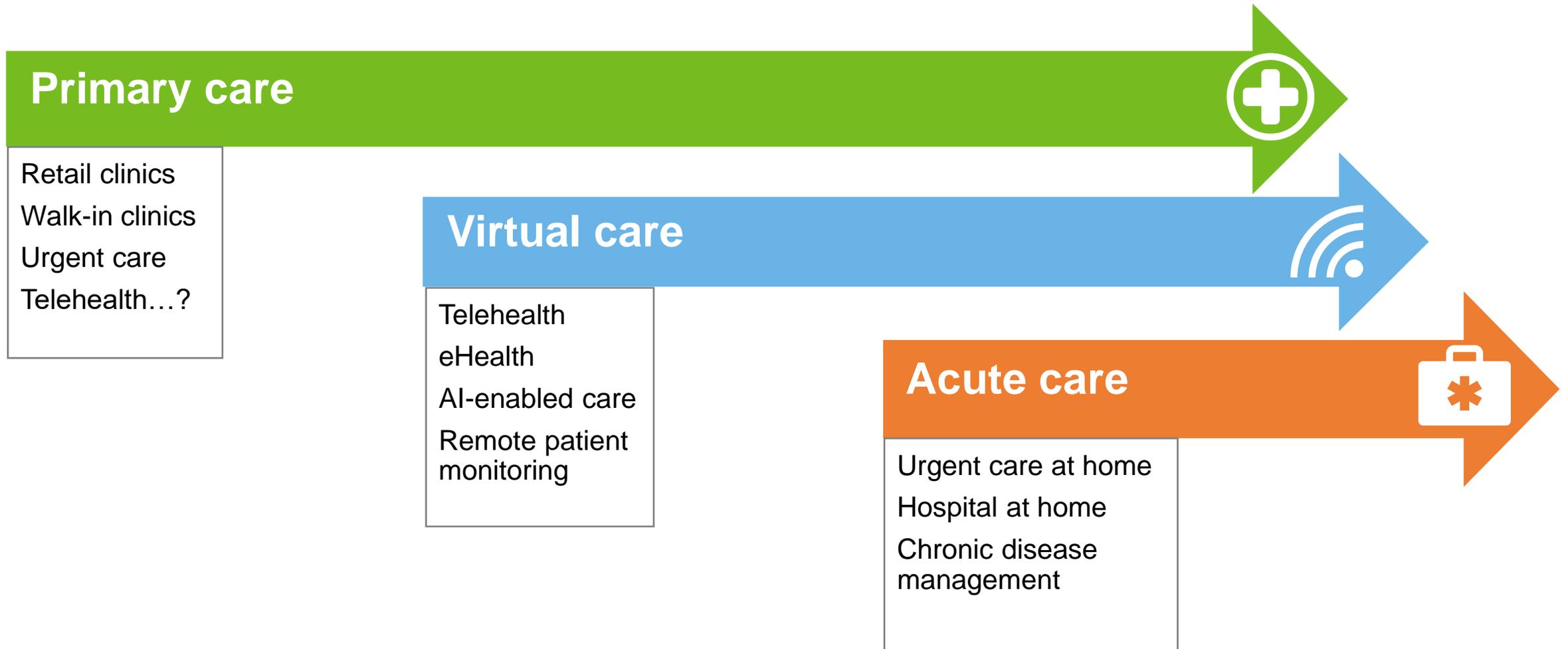
Q57: Next, think about those health care ads that you tend to remember more, do they tend to speak more to the 'head' presenting facts and features about their product or service or do they tend to speak more to the 'heart' connecting on a more emotional level with people. Slide the bar left or right depending on the type of message these more memorable ads present to you. (-5 to +5 range)

Who are the disruptors in your market?

Disruption expanding: “competition” for primary care and more



Kinds of disruption: new players, new ways of accessing care



Retailers evolve towards comprehensive care models

CVS HEALTH

Retail clinic strategy

Looking beyond its retail clinic model—the HealthHUB—to acquisitions of existing primary care and home care assets

Current footprint

1,000

HealthHUBs (originally goaled for 1,500 by end of 2021)



"Our overall strategy is to build capabilities in primary care, home, and provider enablement... We can't be in primary care without M&A... there is no one-and-done asset."

Excerpt from CVS Q2 2022 earnings call

WALGREENS

Building 2,500 sq. ft. full-service primary care clinics in partnership with VillageMD—an experienced risk-bearing entity

120

VillageMD primary care clinics co-located at retail stores (goaled for 1,000 by 2027)



Image credit: Walgreens

WALMART

Building 10,000 sq. ft. health centers offering primary and specialty care services at affordable prices

29

Health centers across Arkansas, Georgia, Florida, and Illinois

Services offered at Walmart Health

- Primary care
- Dental care
- Behavioral health and counseling
- Optometry
- Pharmacy
- Lab
- X-ray
- EKG
- Hearing
- Wellness and insurance education

Out-of-pocket prices range from \$40 to \$90 for a sick or injury visit based on the market

Healthcare for those *can't wait days*

Quickly treat common conditions with 24/7 video visits and messaging* with a clinician. Upfront pricing. No appointments, and no insurance needed.

Find a treatment

Customer satisfaction rating
★★★★★ 4.9

*Messaging available in 34 states



Find a treatment

Choose a condition to learn more, see prices, and get started.

[All conditions](#) [Most popular](#) [Women's health](#) [Men's health](#) [General health](#) [Sexual health](#) [Skin and hair](#) [Rx renewal](#)

35 conditions

Acid reflux (GERD)	Acne	Anti-aging skin care New	Asthma	Athlete's foot	Bacterial vaginosis (BV) New	Birth control
Cold sores	COVID-19	Dandruff	Eczema	Emergency contraception New	EpiPens New	Erectile dysfunction (ED)
Eyelash growth	Genital herpes	Genital warts (HPV) New	Gout attack	High blood pressure	High cholesterol	Hypothyroidism
Male hair loss	Migraine	Motion sickness	Period cramp relief New	Pink eye	Premature ejaculation New	Quit smoking
Rosacea	Seasonal allergies	Sinus infection	Skin treatment for 40+ conditions New	Urinary tract infection (UTI)	Vaginal dryness New	Vaginal yeast infection New

Don't see your condition? [Suggest a new one](#)



WHAT CUSTOMERS ARE SAYING

"Amazon Clinic was incredibly easy and convenient to get my thyroid medication refilled. No hidden fees, no in person visit. Also for someone without health insurance the cost was the absolute best part."



Find a treatment

Choose a condition to learn more, see prices, and get started.

[All conditions](#) [Most popular](#) [Women's health](#) [Men's health](#) [General health](#) [Sexual health](#) [Skin and hair](#) [Rx renewal](#)

35 conditions

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Don't see your condition? [Suggest a new one](#)



one medical



amazon | one medical

Primary care designed around you

Amazon and One Medical have teamed up to make it easier to get exceptional primary care. Most major insurance plans accepted.

[Join now on One Medical](#)



Membership benefits

A membership gives you access to the One Medical app, where you can:

- Get 24/7 on-demand virtual care nationwide, at no extra cost
- Send and receive secure messages with a provider
- Access your health records and care plan
- Request prescription refills and renewals
- Easily book an in-person or remote visit in a state where we have offices

[Learn about One Medical services](#)

Why people love One Medical

One Medical is modern primary care for everything from common illnesses to chronic conditions and mental health concerns.

- Compassionate providers who take time to listen
- Appointments that start on time
- Drop-in lab services at One Medical offices
- Referrals to in-network specialists

[Learn about One Medical services](#)



Quality is in the eye of the consumer.

Now, more than ever.

2014



kmdg22c · 9 yr. ago

I think my well insured patients will continue to see me for primary care because they recognize the added value from my clinic. I think people who have lower tier insurance will settle for what is available for primary care. If you can afford a BMW then people will buy one. If all you can get is a used 1988 Ford Taurus, then that's what you'll drive.

There are two major that be possible so t be a significant plus



[deleted] · 9 yr. ago

If you can afford a BMW then people will buy one. If all you can get is a used 1988 Ford Taurus, then that's what you'll drive.

(?) Will they take Me
orn
Rep



out of curiosity, why do you feel you're a BMW and retail clinics are a 1988 ford taurus? how do you know that you aren't, at best, a dodge? and how do you know that retail clinics aren't acuras? this has been a perennial problem with our health care system. we really don't know who is a quality provider and who isn't. "quality" and "high-performance", historically, have been labels passed along by word of mouth. i work with one physician who was awarded a shiny gold plaque that says "one of the top 10 primary care physicians". he himself chuckled about it and said the award is meaningless and "complete B.S.". our system has failed at providing any quality transparency and effectively measuring the quality of our health care products. that's changing, of course, slowly but surely with the prospect of EMR functionality and analytics.

regarding retail clinic quality, research has underscored that in states where nurse practitioners are allowed to practice to the top of their license, retail clinics deliver high quality care at a much lower cost.

2021

 **r/TheGirlSurvivalGuide** · 3 yr. ago
by chasingandbelieving

Join ...

Wanted to share my experience with CVS telehealth!

Hi everyone!

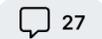
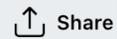
I'm a frequent lurker on this subreddit. I had a virtual doctor visit that I just had for a headache, shittiness, etc. for over two weeks. I had a negative for covid multiple times.

I was getting increasingly desperate and suspected it was a sinus infection and my mom agreed. She suggested that I try a video call with a doctor through the CVS app so I set it up last night. They took my insurance so I don't have to pay, but if you don't have insurance it costs \$59. I had a video call with a doctor who was SO nice and genuinely listened to me and took me seriously. I had symptoms/pain before so this was very helpful. They gave me a course of antibiotics, and I just got better.

It was so easy! I was hesitant to go to an in-person urgent care facility due to the pandemic (I'm in the US and my state has a really high number of covid cases right now) so this virtual visit was a good option. I just wanted to share my positive experience in case anyone finds themselves in the same boat as me. If I can answer any questions please don't hesitate to ask!

Edit: spelling

[Read more](#) ▾

 493   27  Share

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team10go · 3 yr. ago

CVS minute-clinics are the best. You can usually schedule same day or walk in if you don't mind an hour or so wait. They're perfect for minor issues that you don't want to make a whole trip to the doctor to.

  11   Reply  Share ...



chasingandbelieving  · 3 yr. ago

They're so convenient!! And if there's a wait you can shop in the meantime 😂

 4   Reply  Share ...

Rating · 4.9 (3,579 Reviews) ⓘ



Debra Stevens ★ recommends **DispatchHealth**. ...

August 19 at 7:42 AM · 🌐

I knew Mom needed to be seen by medical personnel, so I called the doctor's office. they told me about Dispatch Health. What a game changer! Staff came to the house within a short time (by appointment) and examined Mom. I felt fully informed, confident in the evaluation, good follow up game plan, with professional and kind expertise to a problem that needed attention, but not a 6-12 hour ER room visit. What a Blessing and a relief! So Very Glad to find out about Dispatch Health!



Darlene Nichols ★ recommends **DispatchHealth**. ...

July 25 at 8:56 AM · 🌐

best place to call if you can't get to a clinic or need to see professional health care team. without leaving the house. they can do ekg ,xrays,lab work and check out medical needs.They even prescribe antibiotics.



Donna Kyrz ★ recommends **DispatchHealth**. ...

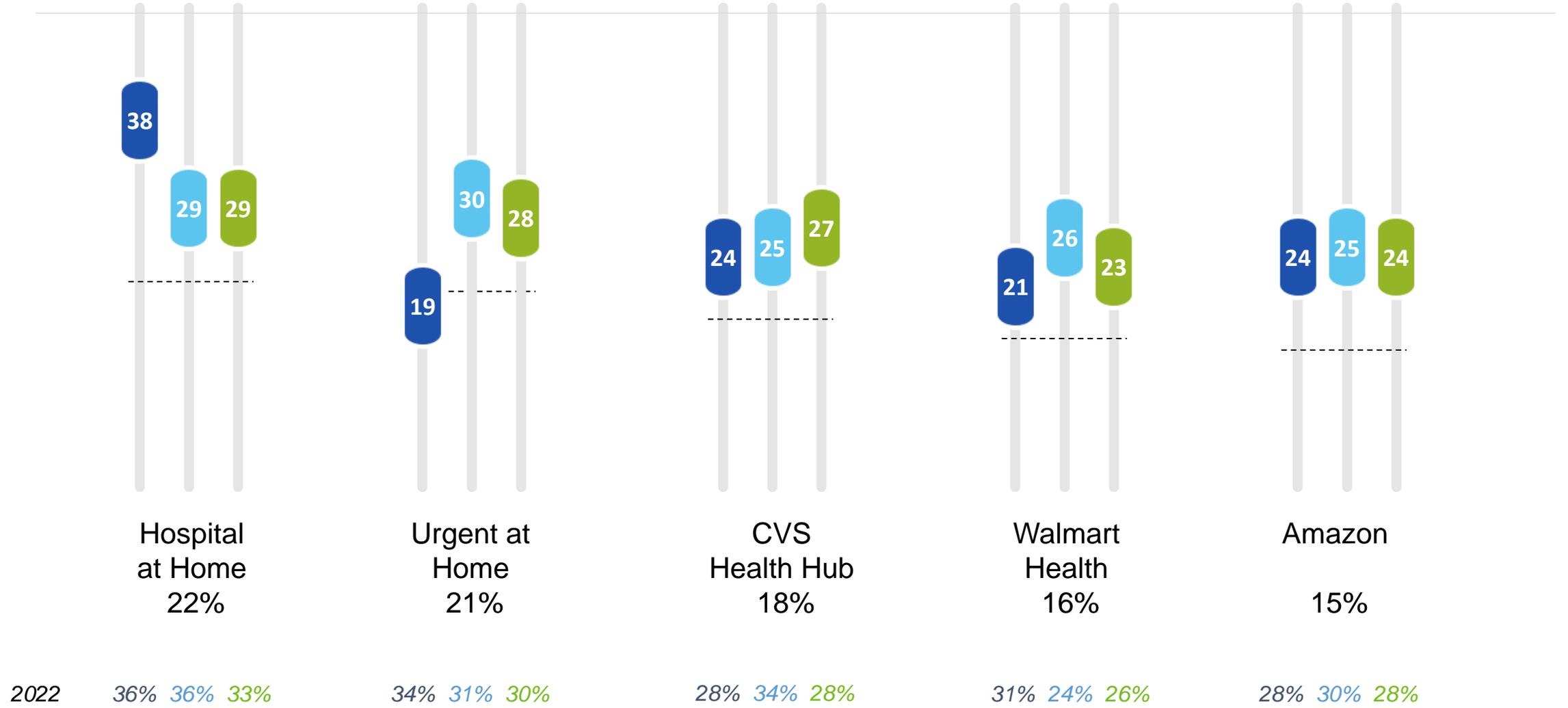
June 23 · 🌐

Dispatch Health Is great. They are compassionate and caring and are knowledgeable about of all aspects of healthcare. This is a great way to get medical treatment in the comfort of your home without waiting in a medical office for long periods of time when your not feeling well.

Service Very Likely to Use or Sign-up For



50%



**Consumers will use whatever's convenient.
They don't care who's providing it.**

(It's a both/and world.)

CONVENIENCE IS KEY

- No appointment or easy-to-book appointments.
- Shorter wait times.
- Don't have to go to a separate pharmacy to pick up over the counter or prescription medicines.
- Don't have to search for a PCP who takes a particular insurance type.

PROVIDER PERSPECTIVE

- Known for being very short staffed.
- Stressful for NP or PA who is running a whole clinic.
- Retail's thin staffing is strangely seen as a benefit by consumers.
- Much simpler/less confusing for the patient (fewer people).
- The patient doesn't need to do as much to advocate for themselves or be the messenger.



I just talked to a friend who works at Minute Clinic. I asked because I was interested in working there as well. They said there is no ancillary staff at all. Providers must check in patients, clean up rooms, see the patients, and then order supplies. She says there's a line as soon as it opens and no lull in the day at all. So no time to order supplies. Basically you're running a clinic by yourself making CVS lots of money as you work yourself to death.

– Reddit User





chasingandbelieving  • 3 yr. ago

This is my first experience with telehealth and I'm so pleased with how it went. I definitely will be using it again in the future. I'm working from home right now and the whole appointment took maybe 20 minutes whereas before I would've had to get up 2 hours beforehand and take the subway halfway across the city. So much easier!!



GoatFairy • 3 yr. ago

I work in the Telehealth industry for several years now and it's becoming increasingly popular worldwide! So cool to hear people discovering it. 80% of medical cases that are treated in clinics can be treated virtually.

  169   Reply  Share ...



chasingandbelieving  • 3 yr. ago

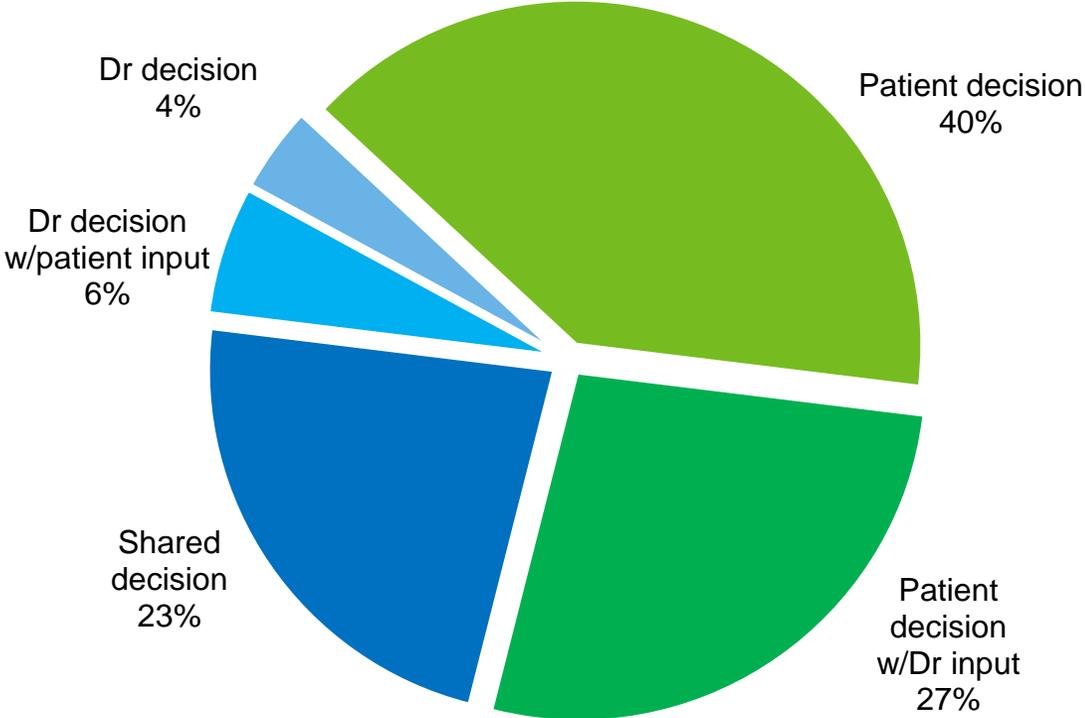
It's amazing! I definitely will be using it again in the future. Thank you for what you do!!

These are new starting points for care.

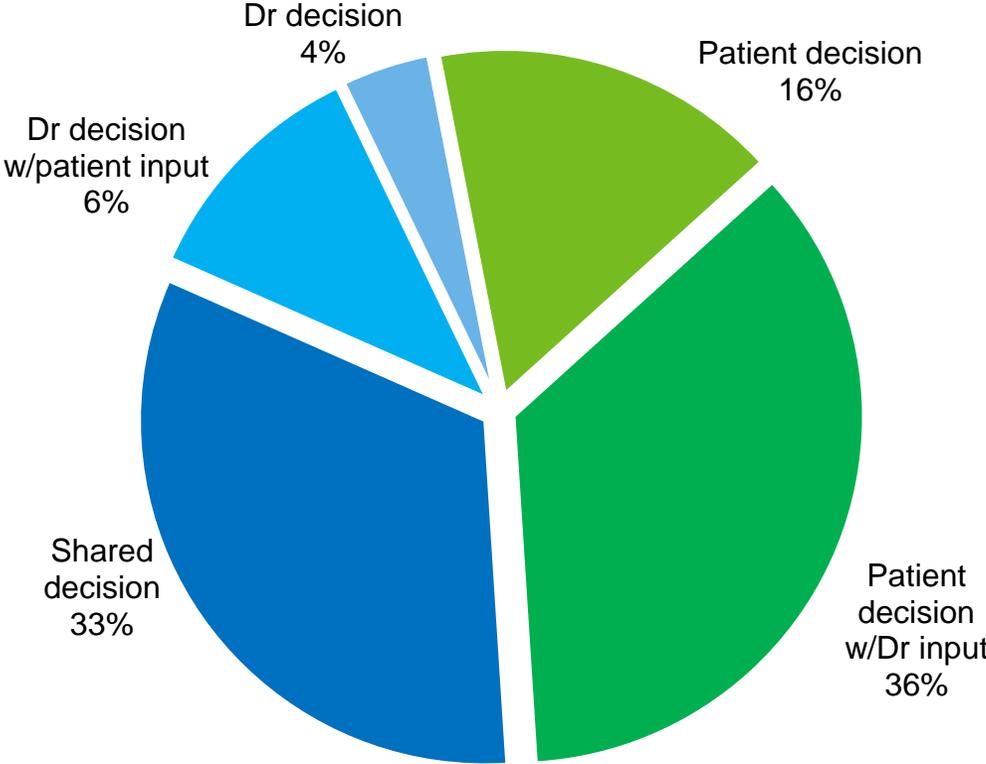
Technology = Control
Control = Better Experience

While patients are still proactive in their health care decisions, doctor input has increased since 2022

2022



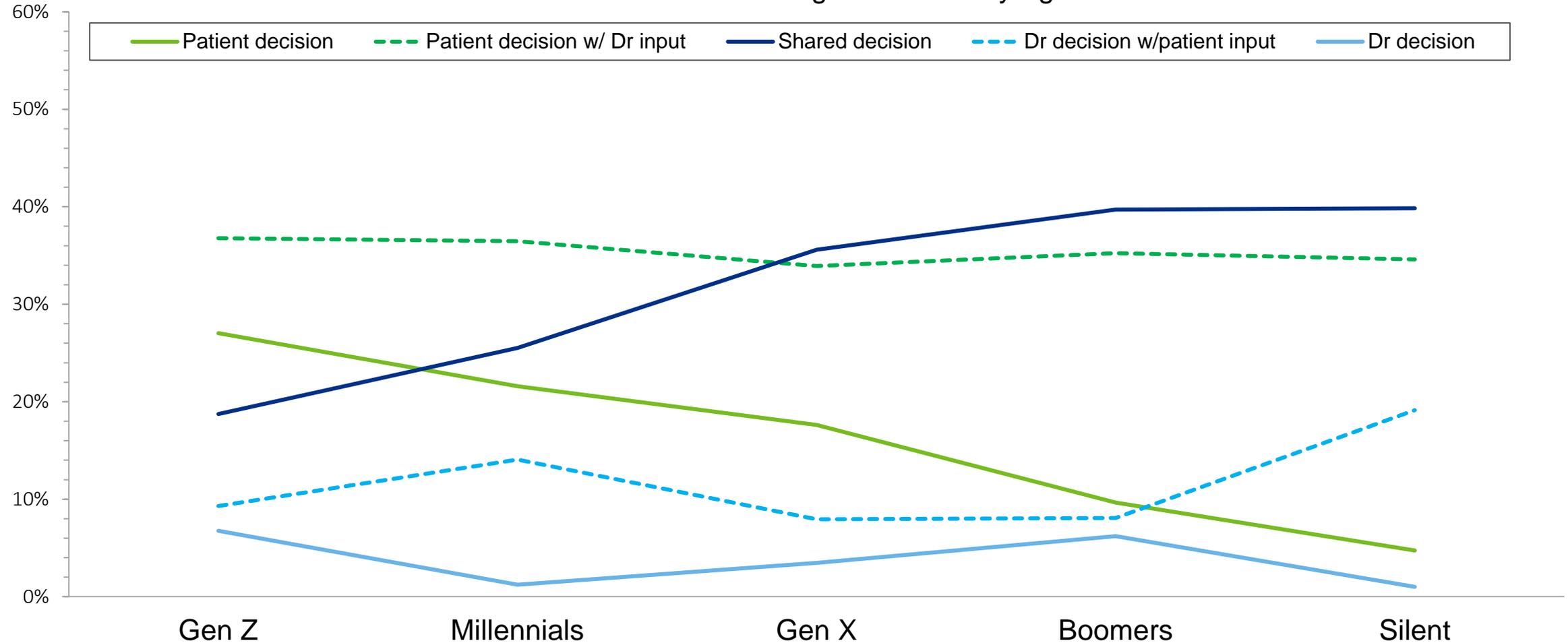
2023



Patients' Desired Role in Health Care Decisions

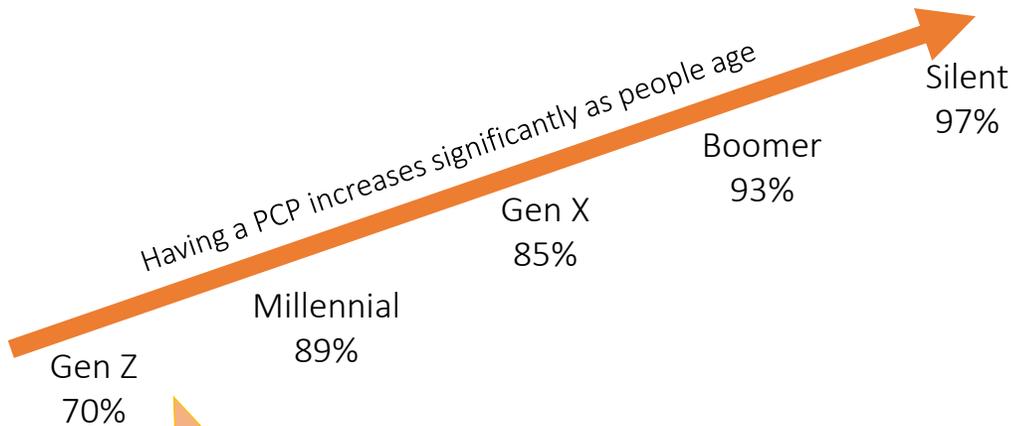
All age groups (especially Gen Z and Millennials) have shifted towards a shared decision since 2022

Patient Decision-Making Preference by Age



The younger you are, the less likely you are to have a PCP

88% of adults have a Primary Care 'Provider'



Down significantly from 78% in 2022

Primary Care Provider is...



74%
Primary Care Physician



6%
OB/GYN



18%
PA or NP

And They Are Located At...



73%
Physician's Office



15%
Hospital



5%
Urgent Care Center



3%
Retail Pharmacy



1%
Virtual App

Q2: Do you have a primary care provider?
Q2.2: Who do you consider to be your primary care provider?
Q2.1: Is your primary care provider located at a...?

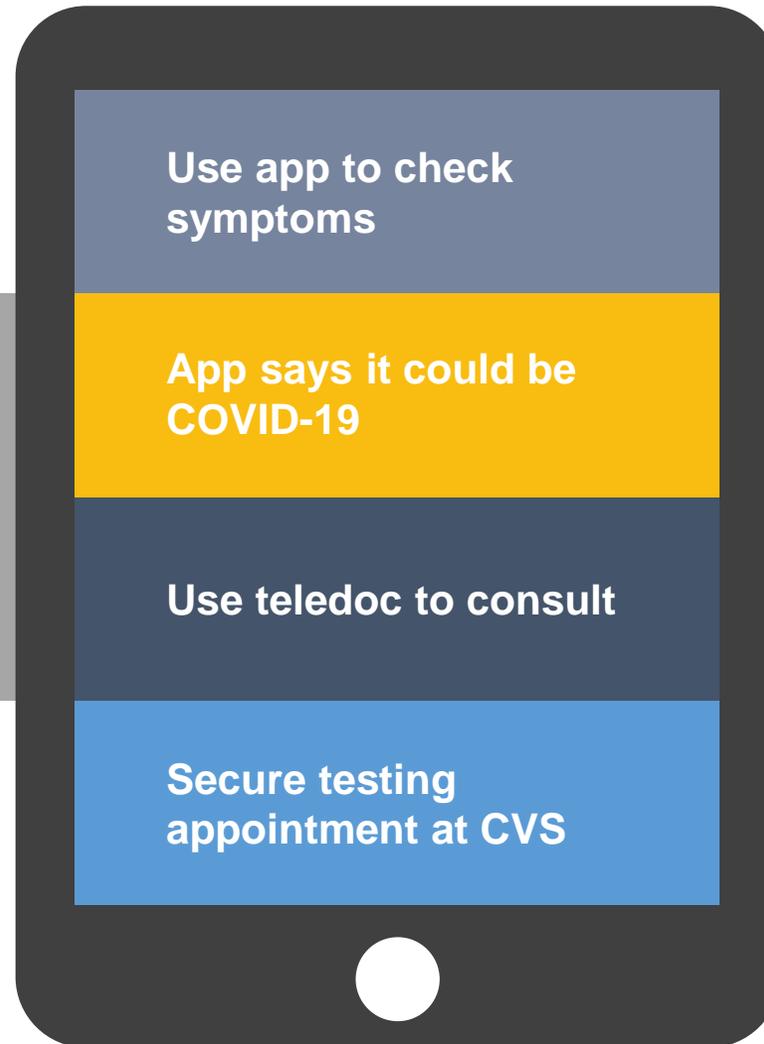
**Time (and convenience?)
is the new currency.**

-Rob Klein

**Not every cough needs
an in-person doctor's appointment.**

*And consumers are smarter than
their providers give them credit for.*

**Home tech as
starting point within
a journey**



We have observed that when patients have this kind of control over their care journey, they *feel the experience is better*



argininosuccinase · 9 yr. ago

Seems like a lot of people want to hate on these but I have used these (or an equivalent) several times for urinary tract infections when my regular office refused to work me in even with calling ahead. (Explain to me

how I am supposed

dipstick and someone

something strange

people from using

to the ER (which

29



buttermellow11

I've done appointments

3



[deleted]

I've been

4



wirednyte

Are you a

they give service to people who want a walk in, I am just unsure as to whether the model will cause or solve healthcare access issues over time. I'm sure some of both. Your story is very positive. However, I have heard many stories in the other direction where appropriate care was delayed due to not having proper examination and diagnosis.

Thursday, December 4, 2014 at 8:54:44 AM EST

Seems like a lot of people want to hate on these but I have used these (or an equivalent) several times for urinary tract infections when my regular office refused to work me in even with calling ahead. (Explain to me how I am supposed to make an appointment for a UTI a week ahead of time). I need a thermometer, a urine dipstick and someone to write me a prescription for an antibiotic. I'm a 20 something female, I had a UTI not something strange. yes many bad things masquerade as benign illnesses but the rare zebra shouldn't stop people from using these places for infrequent minor acute illnesses. For me it was either use this place or go to the ER (which is such overkill for an uncomplicated UTI).

29



buttermellow11 · 9 yr. ago

I've done the same; it was either wait 2 days with a UTI then drive 40 minutes to see my doctor, or get an appointment that day at a CVS/Walgreens.

3



MarlanaS · 3 yr. ago

I went to a CVS Minute Clinic today because I've had a lot of chest congestion and a negative covid test, they were amazing. I did have to wait about an hour, but it was so worth it. I have bronchitis and they wrote me a prescription and told me to get some Mucinex, but not to buy it at CVS because they charge more for it than anywhere else.

I use Planned Parenthood's telemedicine service for my birth control and can't recommend it enough. Their app is easy to use and the nurse I talked to was very helpful.



8



Reply



Share



chasingandbelieving  · 3 yr. ago

I've never gotten anything through Planned Parenthood but I've heard great things! I might use them for my birth control in the future



2



Reply



Share





KA260 · 9 yr. ago

As a customer with almost zero real health problems, and shitty insurance, I LOVE the take care clinic at walgreens. Tell me why my primary care doctor charges \$80 a visit, to tell me "you have a sinus infection or some sort, here, take this Rx to your pharmacy. No I won't send it for you, that means I'd have to use technology or something, ew". But I roll out of walgreens for half that cost, including the Rx that I don't have to technically "take" anywhere to fill. If I was having gut wrenching pains or something, I'd go my normal doctor, but for sniffles, flu-shots, coughs, pink eye, etc. I'm all over that clinic.

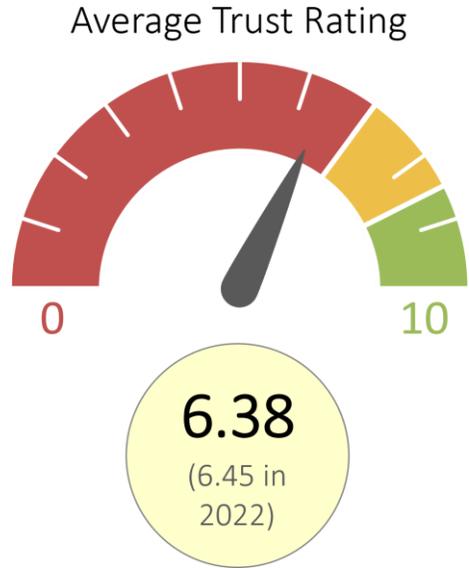
I've never waited more than 20 minutes from my appointment time, oh, and you don't NEED an appointment. You just kinda show up. Much more convenient than Mr. I'm open from 8-9:30, 10:45-12, 2-4 MWF. The nurse practitioner doesn't pretend to be a doctor and will send you elsewhere if necessary. Never had one insurance problem. Never had one Rx filling issue. Nothing. I cannot count how many different primary physicians I've had, and how many issues I've had with their staffing that were just pains in the butt.

I also have a lot of weird tests I need done for school. I've had like 4 TB tests the last 2 years, plus tons of other weird labs. It's the same price every time, they're fast, and I always get my paperwork. I went to my primary Dr. first-- HAH. It wasn't necessarily the doctor, but lets just say I had to go THREE times for the SAME titer, and each time they did it wrong or told me "no you said this one", then made me pay again anyway for the visit.

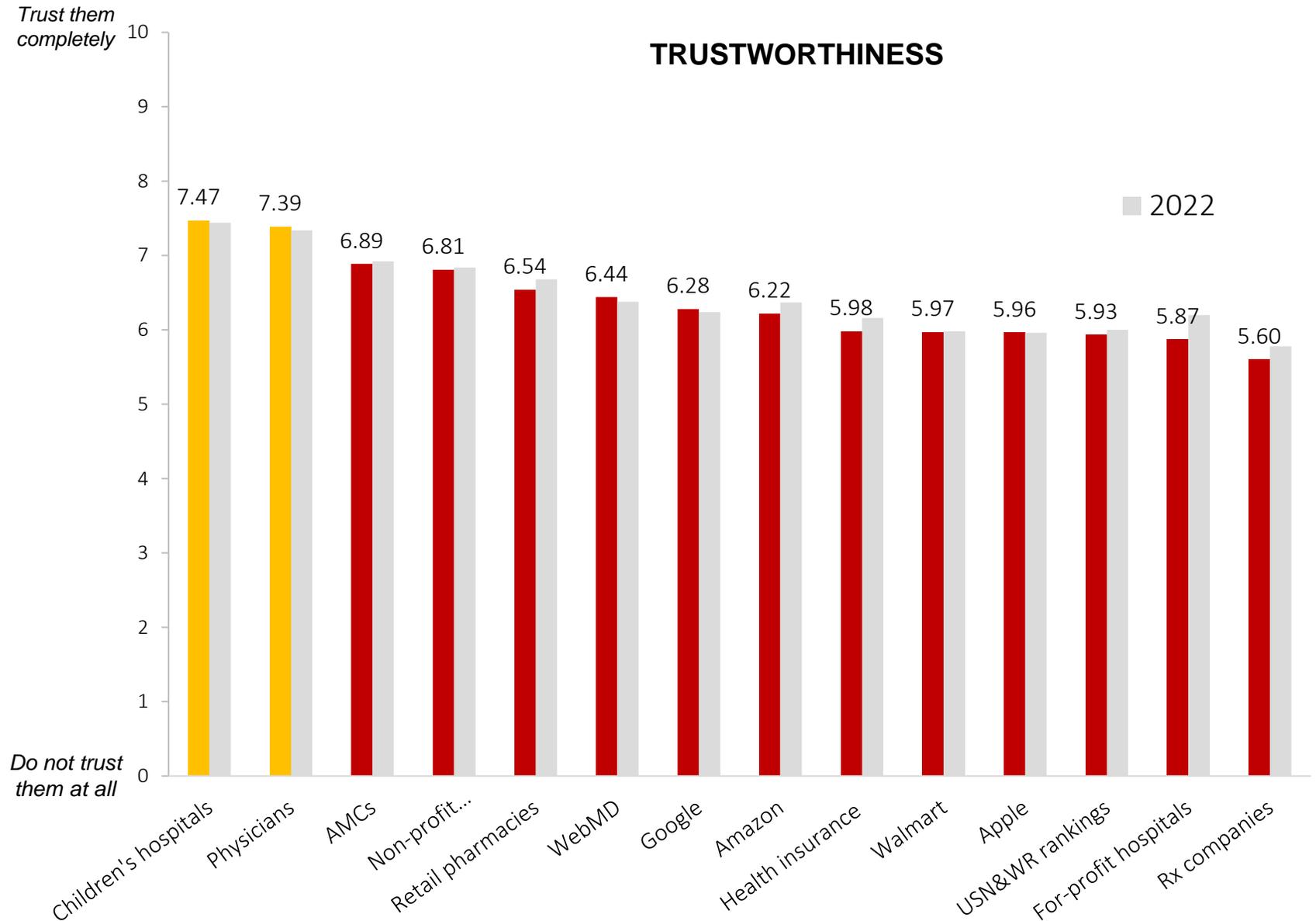
 32   Reply  Share ...

Transparency = Trust

Trust is not strong even for perennial favorites; basically flat or decreasing since 2022



Millennials and Gen Z tend to have higher levels of trust across the board.



Retail clinics are seen as the more transparent transaction

Healthcare signals a “patient experience” but....

- Private clinics and health systems pretend it isn't about money.
- Retail clinics **don't pretend you aren't a customer**
- **Poor customer service gets rationalized: “it's healthcare, not service.”**

Transparency in pricing is deeply important to customers/patients

- We don't reveal prices up front because “it is about health, not service.”
- Patients feel tricked when they get the price at the end of the appointment – or later.
- Whereas retail often tells them **exactly what they are getting and what it costs.**



Walmart Health Services Summary Price List



Primary & Urgent Care

Office visit	\$40
Annual checkup	\$30
Annual checkup - youth	\$20
Add-ons	
Lipid test	\$10
A1C test	\$10
Pregnancy test	\$10
Flu test	\$20
Strep test	\$20
Mono test	\$20
Stitches & other	\$116*
Flu immunization	\$40*
Flu HD immunization	\$70
Other immunization	Varies
External lab tests	Varies

Dental

Patient exam (including X-Rays)	\$25 starting at \$25
Teeth cleaning - adult	starting at \$15
Teeth cleaning - youth	\$675*
Porcelain crown	\$225
Teeth whitening	\$75
Deep cleaning (per quad)	\$75
Emergency treatment for pain	\$50
Filling	\$75-\$125
Clear aligner	\$1,800

Counseling

New patient intake	\$60
Individual counseling (45 min)	\$45
Family counseling	\$70
Couples counseling	\$70

Optometry

Routine vision exam	\$45
Contact lens fitting	\$55

Hearing

Hearing exam	Free
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Other

Tivity health & fitness classes	Varies
Health insurance enrollment	Free
Community resource consultations	Free

*Charges with an asterisk are the average prices customers are expected to pay, but actual cost will be determined on a case by case basis. Any price without an asterisk is the actual price.
To schedule appointments, please visit WalmartHealth.com
As of 9/23/2019

**Upfront Pricing
+
Backend Billing**

24% searched for health care service prices and 56% of those chose the lowest price option



24% (20% in 2022)
Price Shopped

Gen Z	36%
Millennials	35%



Called: 54% (54% in 2022)



Went online: 26% (27% in 2022)

Gen Z	35%
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Stopped in personally: 10% (7% in 2022)



Emailed: 9% (11% in 2022)



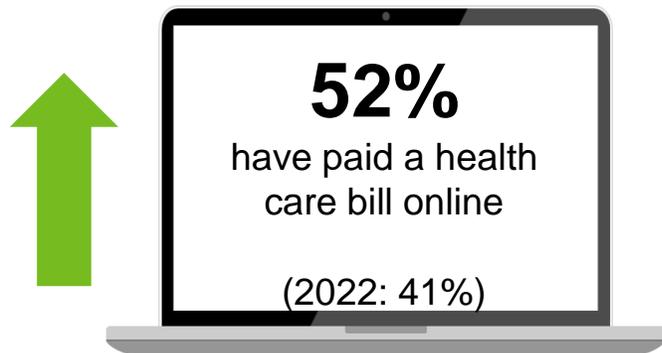
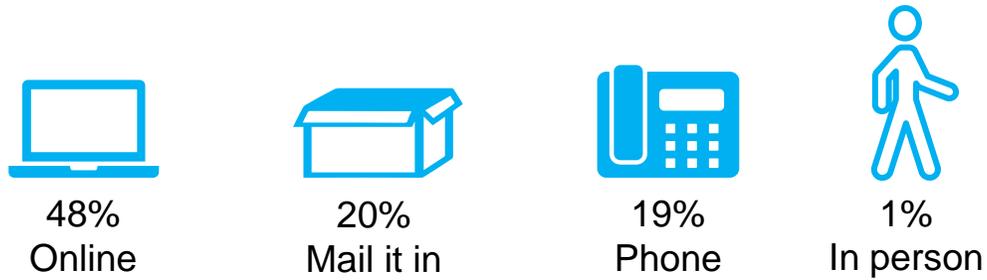
56% (53% in 2022)
Chose Least Expensive Option

Gen Z	60%
Millennials	66%

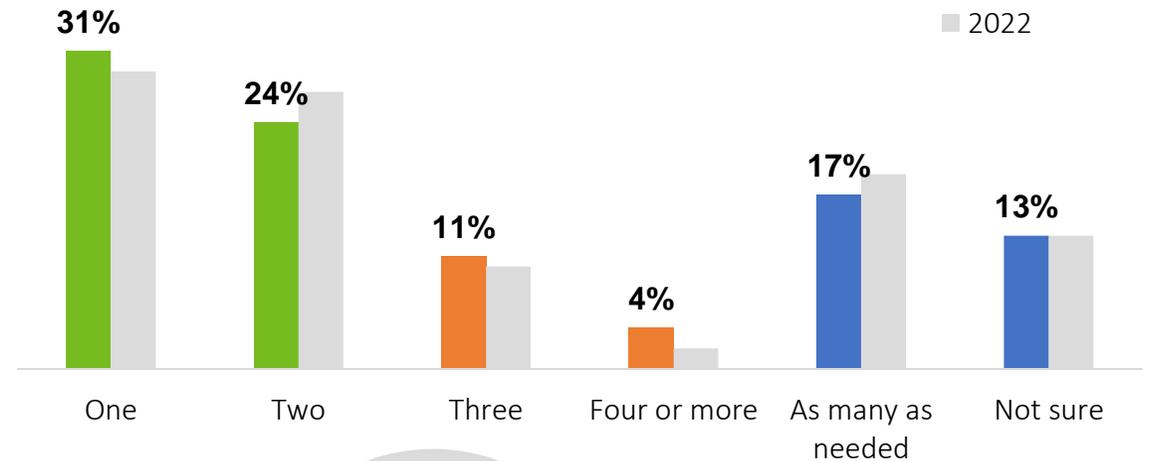
Q61: Next, within the past year, did you or did a member of your immediate household contact any health care organizations, hospitals, or physician offices to ask about the price for a specific visit, test, treatment, or surgery?
 Q62: How did you check on pricing the most recent time?
 Q63: What type of health service did you ask about pricing for the most recent time?
 Q64: Did you end up choosing the least expensive provider the most recent time?

Increasing preference and action for online bill paying; fewer and faster bills is better

Preferred Method to Pay a Health Care Bill



ACCEPTABLE NUMBER OF BILLS TO RECEIVE



76%
feel that ONE MONTH is the longest it should take for you to send a bill

Q65: Do you prefer to pay medical bills...?
 Q66: Do you ever pay your health care bills online through your provider's website?
 Q67: How would you rate your online health care bill paying experiences overall?

**Retail has learned healthcare faster than
healthcare has learned retail.**

(The same is true of tech.)

How do we measure up?

Traditional



Quality

Quality – Complexity

Customer Service

Ease of Access

Control

Pricing + Quality Logic

Transparency in Motives

Speed of Care Delivery

Transparency of Speed

Disruptors



Three Key Disruptor Take-Aways

- **Technology = Control**

- Disruptors have moved the starting line up and allowed people to take more control of their care.
- Quality is in the eye of the consumer. Now, more than ever.

- **Control = Better Experience**

- Time is the new currency (Rob-ism)
- Consumers want convenient, reliable care (mostly).
- It's a both/and world.

- **Transparency = Trust**

- Retail has learned healthcare faster than healthcare has learned retail. (The same is true of tech.)

Ask yourselves:

Which of these disruptions will benefit consumers the most?
What are you doing to meet these new expectations?

How are we adapting to the shift in power structure?
Do we even see it?

Considering how COVID has affected consumers,
how might we market differently?

Are consumers receiving healthcare? Or buying healthcare?
Is it REALLY a relationship? Or a transaction?

What business are we in? What business **should** we be in?
Who do our communities need us to be?



Questions?

Please be sure to complete the session evaluation!



Thank you!

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klein & partners



Feedback



**Download
and sign up
for NCIS**



Society for Health Care
Strategy & Market
Development™

Disruptors we tested

- a) **Amazon Care:** Provides primary and urgent care services to adults virtually on your mobile device or PC as well as in-person at one of their locations or in your own home or even your workplace.
- b) **Health insurance plans** such as Humana and Kaiser opening up primary and urgent care centers; Humana will open its own senior-focused primary care offices while Kaiser has partnered with Target and CVS to open up clinics in Target stores.
- c) **Walmart Health:** Clinics in Walmart stores providing medical, dental, and optometry services.
- d) **Virtual-first primary care plans:** Major plans such as UnitedHealthcare, Aetna, and Cigna are developing health plans where the first entry point to getting primary and urgent medical care is with a virtual primary care provider. From there, the next step in the care journey is determined and can include transitioning to in-person care.
- e) **Artificial intelligence-powered virtual assistant:** Alexa Health and Wellness at Amazon can interact with people in their home and provide reminders to take prescriptions and answer health-related questions, schedule appointments, etc.
- f) **Remote patient monitoring:** The use of digital technologies to monitor and capture medical and other health data from patients and electronically transmit this information to healthcare providers for assessment and, when necessary, recommendations and instructions.
- g) **Hospital at Home:** Hospital-at-home enables some patients who need acute-level care to receive care in their homes, rather than in a hospital. For example, following a surgery, rather than an extended hospital stay, the patient is sent home with equipment such as IV's and remote, internet-based monitoring devices, along with visits from medical professionals, to recover and recuperate in their own home.
- h) **Urgent Care at Home:** Rather than visiting an urgent care center for non-life-threatening situations, patients can request a traveling "urgent care" team of two medical professionals capable of administering tests and certain medications to visit their home in a timely manner.
- i) **CVS Health Hub:** Expanding on Minute Clinics that focus on minor illnesses and immunizations, Health Hubs will focus more on chronic disease management, services like sleep apnea assessments, blood draws, virtual visits, on-demand health tools apps. And a "care concierge" will direct customers to providers like nurse practitioners or nutritionists. There also will be an expanded offering of medical equipment and other medical supplies.

Bibliography/References

- Original research “National Consumer Insights Study (NCIS)” from Klein & Partners and Core Health and digital ethnography from Feedback.
 - Feel free to use any of these charts and share with colleagues; we just ask that you acknowledge Klein & Partners + Core Health: 2023 NCIS as the source of the data.
 - Many of these topics have additional data available for further analysis or discussion; if you are interested in learning more, please get in touch.
- Additional data from Advisory Board.