

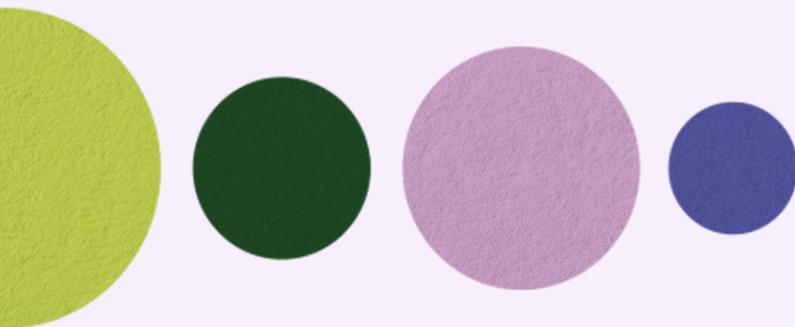
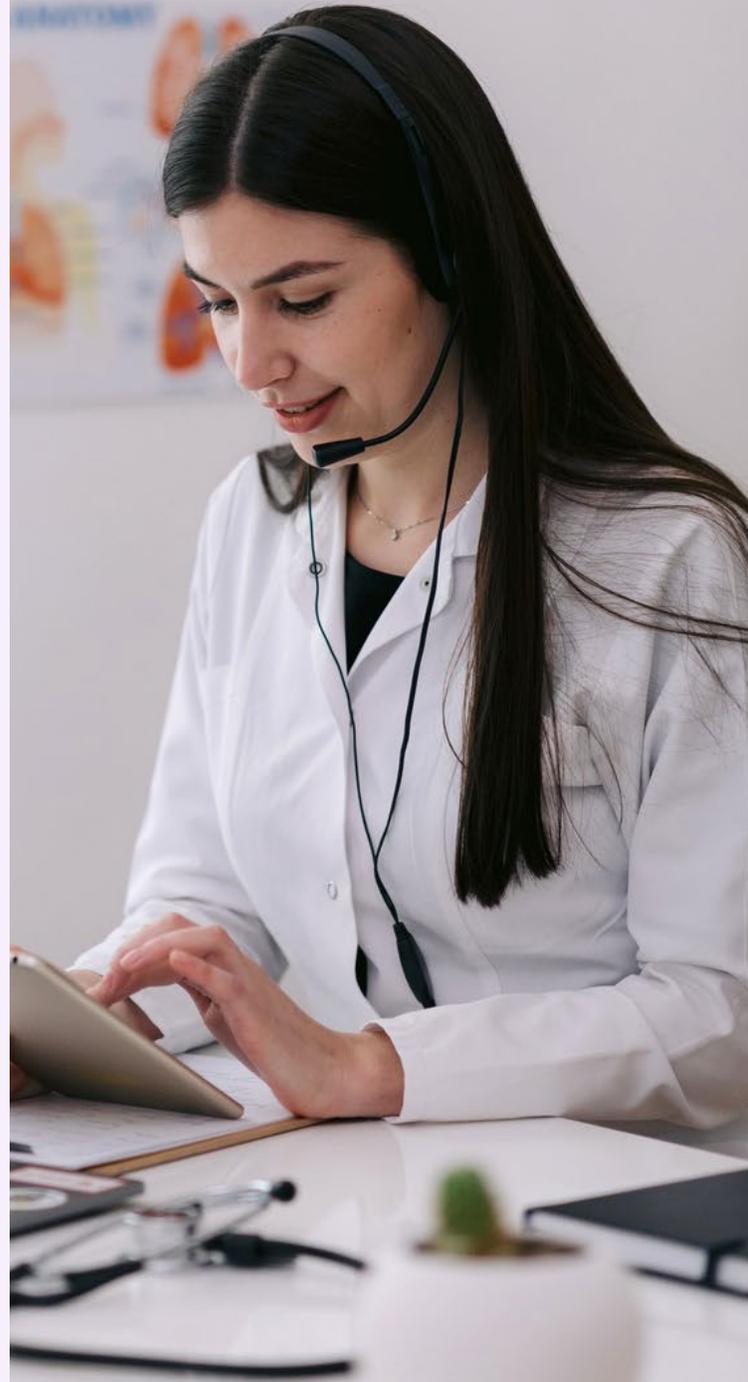
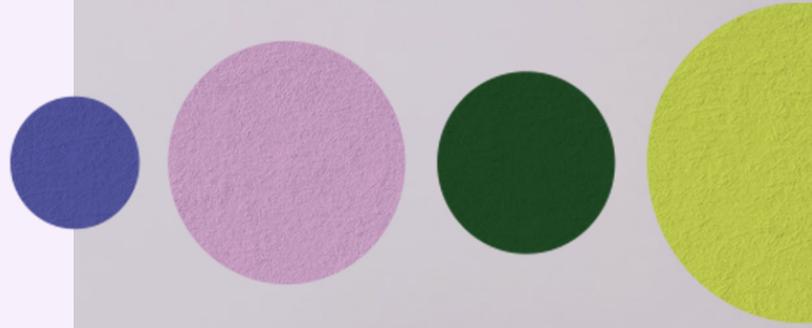
WELL+GOOD X QUESTDIRECT

The Future of Personalized Healthcare

INSIGHTS STUDY 2022

From delayed access to care and scheduling conflicts to fear of contracting COVID-19, consumers continue to feel the impacts on their healthcare journey as a result of the ongoing pandemic. Whether by choice or by force, some consumers have put off seeing their primary care physician for even a routine physical – despite mounting mental and physical effects from the pandemic.

But change is afoot. Telehealth, direct-to-consumer testing, and data tracking each help patients take healthcare into their own hands, and patients are discovering the benefits and conveniences of this new class of tools at their disposal.

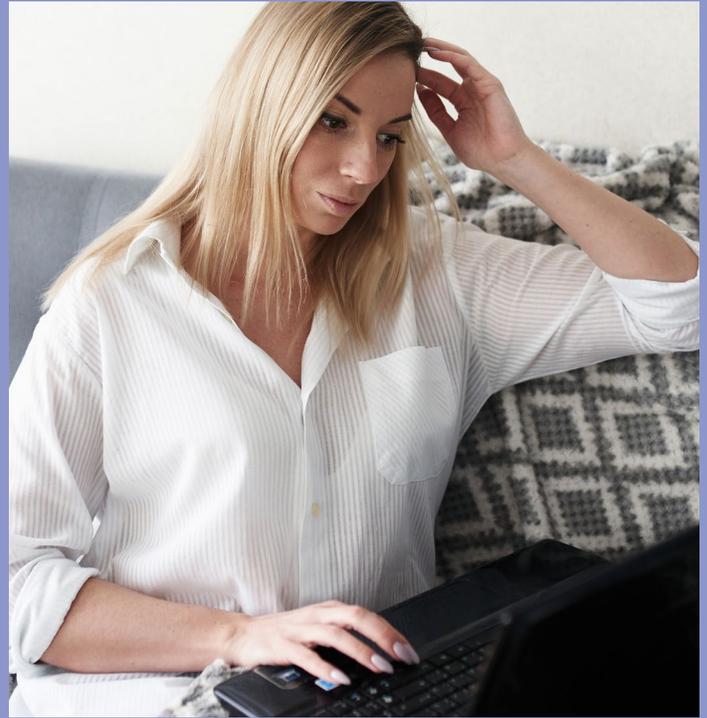


AN APPOINTMENT DEFERRED

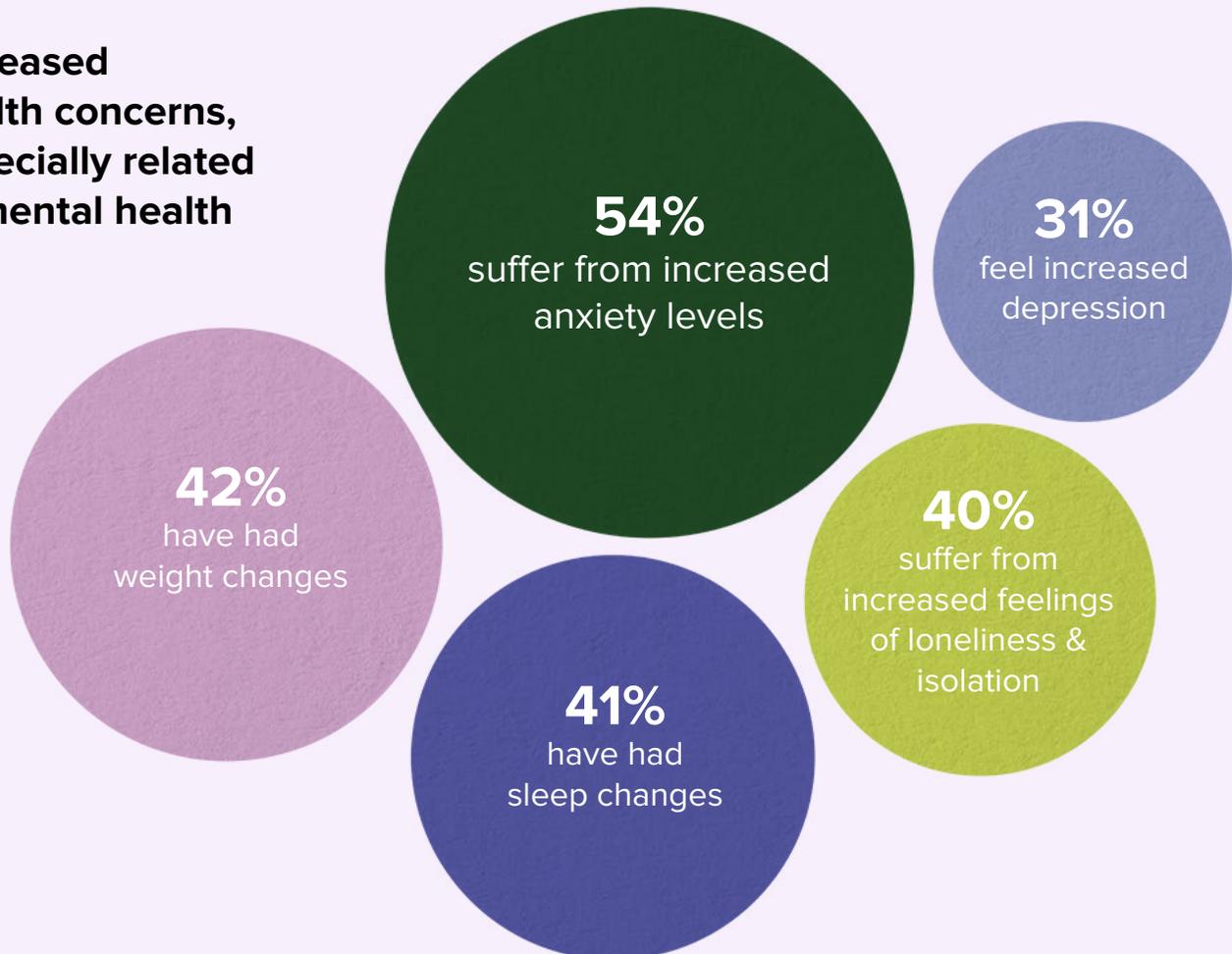
While health concerns have increased dramatically, nearly a third have experienced delays in accessing healthcare professionals and, not surprisingly, the same percentage said that timely access to a healthcare provider would improve their experience.

55% of respondents have been forced to postpone or cancel a doctor appointment due to the pandemic

16% have been forced to postpone or cancel 3+ appointments



Increased health concerns, especially related to mental health



PREVENTIVE CARE VISITS

Preventive care is a critical piece of maintaining health and wellness and yet it often gets pushed aside for various reasons ranging from insurance issues and the pandemic to an inability to forge a comfortable doctor-patient relationship.

Nearly a quarter of survey respondents haven't had a physical in 2+ years and 71% looked to online resources for health recommendations and advice.

This group identified a host of hurdles as to why preventive care has fallen short:

In Their Own Words

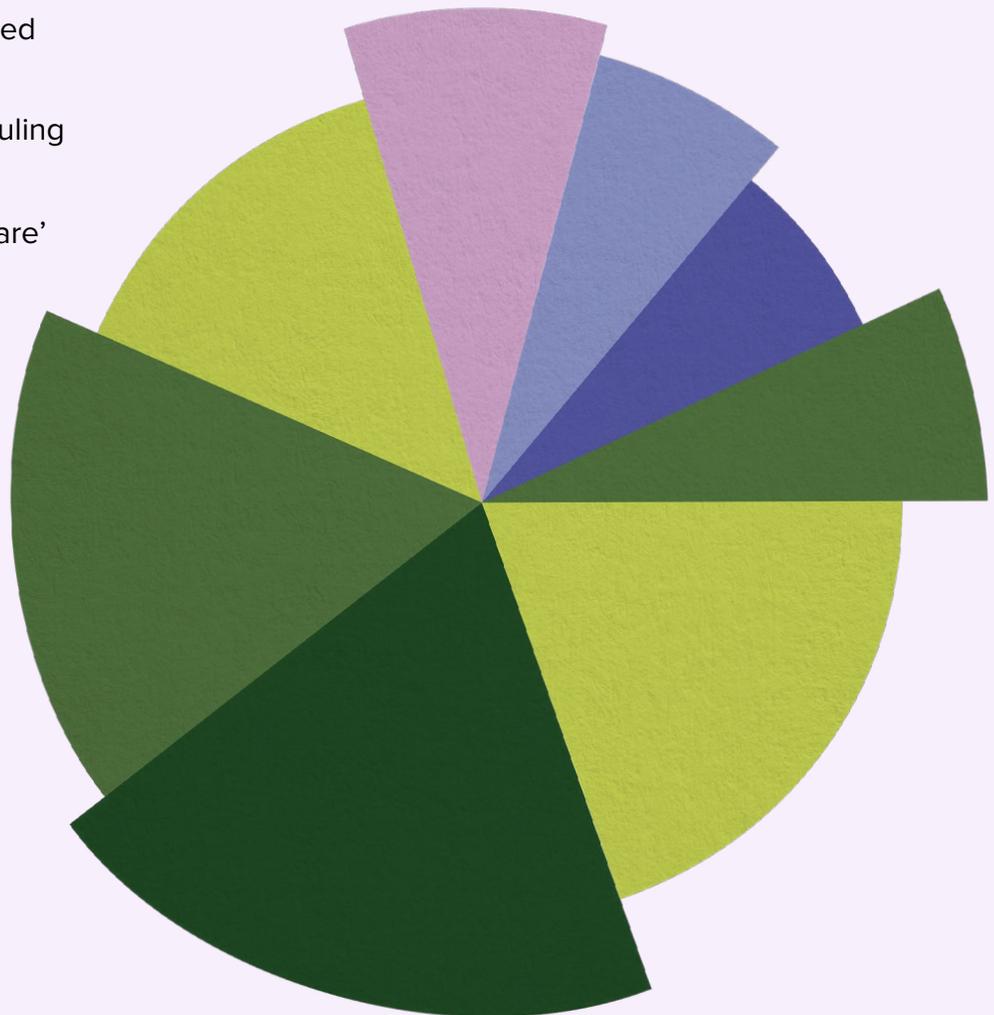
- Since shutdowns, I just got out of the habit
- Until this year, I was too worried about catching COVID to go for wellness care
- Lack of connection or relationship with doctor
- Lack of quality insurance
- It takes a long time to get an annual appointment
- I feel healthy overall
- Long waiting time in lobby and waiting inside office for doctor

REIMAGINING THE EXPERIENCE

Nearly all can agree that the ease of connecting with the right physicians is important to elevating their preventive healthcare experience in the future, and 88% said they would like more access to personalized healthcare data. Moreover, a deeper, individualized dialogue with their physician would go a long way to encourage these folks to keep up with regular care.

Respondents agreed there are improvements to be made to the preventive care/healthcare experience:

- 88%** said access to personalized healthcare data
- 87%** said 'more flexible scheduling with their physician'
- 76%** said 'on-demand healthcare'
- 61%** said 'the availability of telehealth services'
- 38%** said 'having a solid understanding of my lab test results and what they mean'
- 31%** said 'having an understanding of what services are right for me'
- 31%** said 'dialogue with my physician'
- 30%** said 'timely access to healthcare provider'



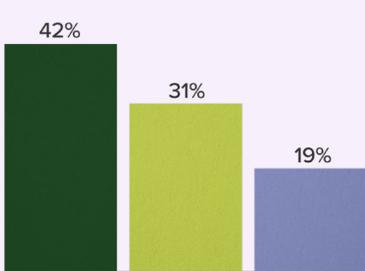
HEALTHCARE: HAVE IT YOUR WAY

Both younger and older Millennials are adopting new tools within the healthcare system more widely than their Boomer counterparts. And there are significant generational differences when it comes to the desire for greater personalization in their healthcare and healthcare data. Wearables have been widely adopted, as consumers explore the ability to track their own biometrics and physical activity and use that information to make positive changes in their daily routines, but the big obstacle is truly interpreting all that data.

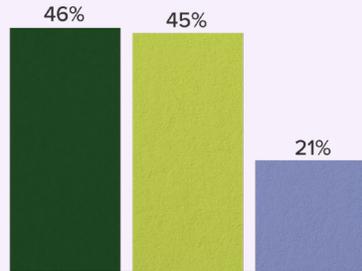


57% recognize they cannot change their genetics, but they *can* change their biometrics

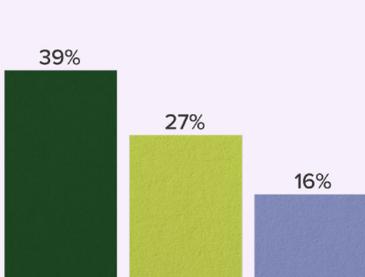
48% indicated that wearable tech is important to elevating their preventive healthcare experience in the future (e.g., Apple watch, Apple Health app, Fitbit, connected scale, etc.)



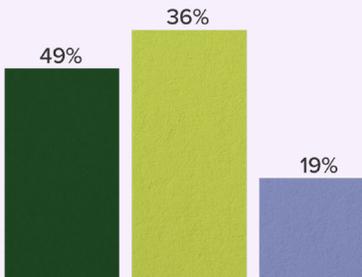
Want more personal control in their healthcare journey



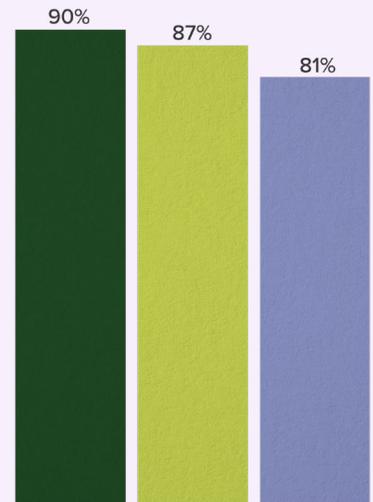
Would like more personalized healthcare data



Would like a better way to track their healthcare progress over time



Wish they had a better understanding of what their healthcare data means



Say access to healthcare data from phone/computer would elevate their healthcare experience

ACING THE TEST

Attitudes, needs, and expectations around how people want to receive care are all shifting. Access to affordable diagnostic testing is quickly becoming a must-have and the ability to track and make sense of that data is critical.

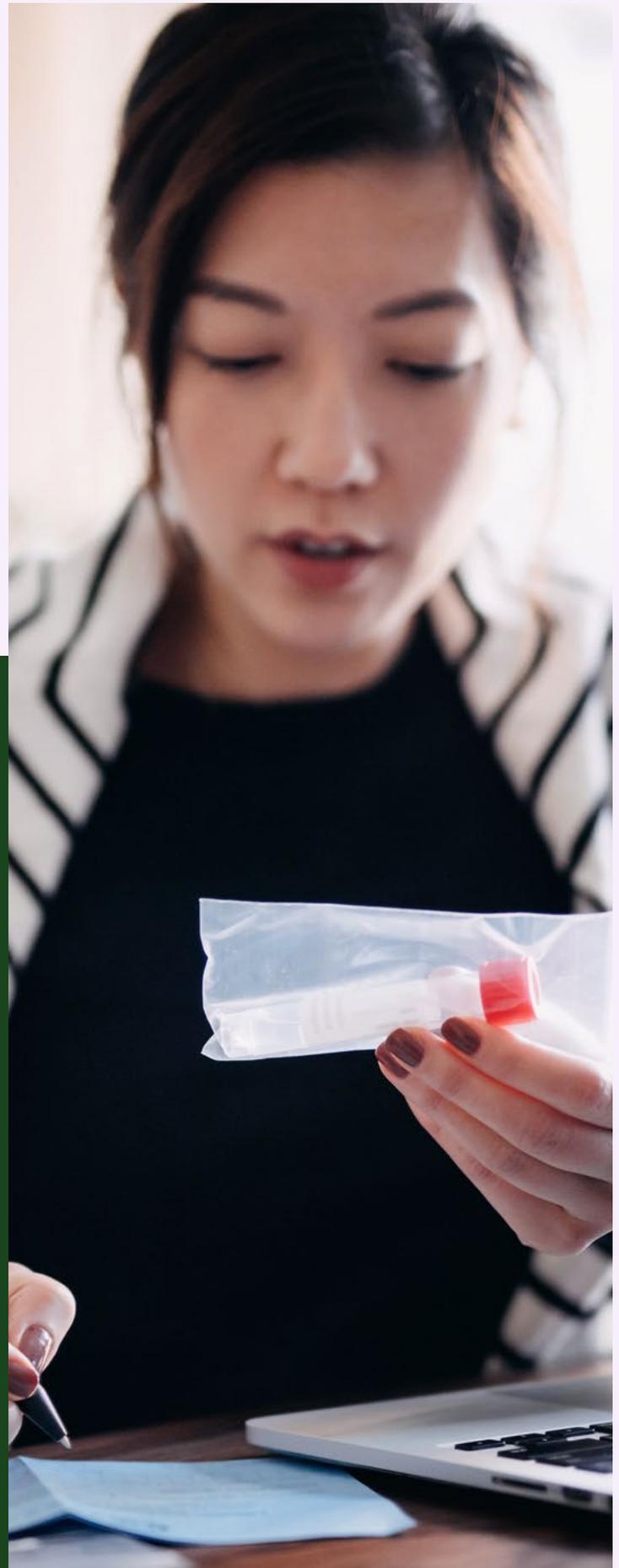
Two-thirds (66%) indicated that 'Discussion of lab test results during my visit (versus after)' and 34% said 'At-home lab testing options' would both be part of a reimagined annual preventive care visit. Too often, our respondents found that their annual physical did not provide enough of a deep dive into potential issues or conditions.

86% would test for ailments at home if consumer-initiated or direct-to-consumer testing was more readily available

70% are likely to participate in more diagnostic testing as part of their personalized healthcare journey over the next 12 months

60% indicated that having consumer-initiated or direct-to-consumer testing is important to elevating their preventive healthcare experience in the future

52% indicated that having tests available for purchase online is important to elevating their preventive healthcare experience in the future



TELEHEALTH: CLOSING THE DISTANCE BETWEEN PATIENT AND DOCTOR

Personalization and meaningful insights sit at the top of the patient wish list when they think about improving the healthcare experience. But convenience and access are also top considerations, and telehealth can answer the call for both.

5% use telehealth as their primary healthcare provider

19% prefer telehealth to an in-person visit

Of those that haven't already accessed healthcare via telehealth, **93%** would consider using virtual care as a primary provider

The main reasons respondents would opt for telehealth appointments vs in-person visits with a physician:

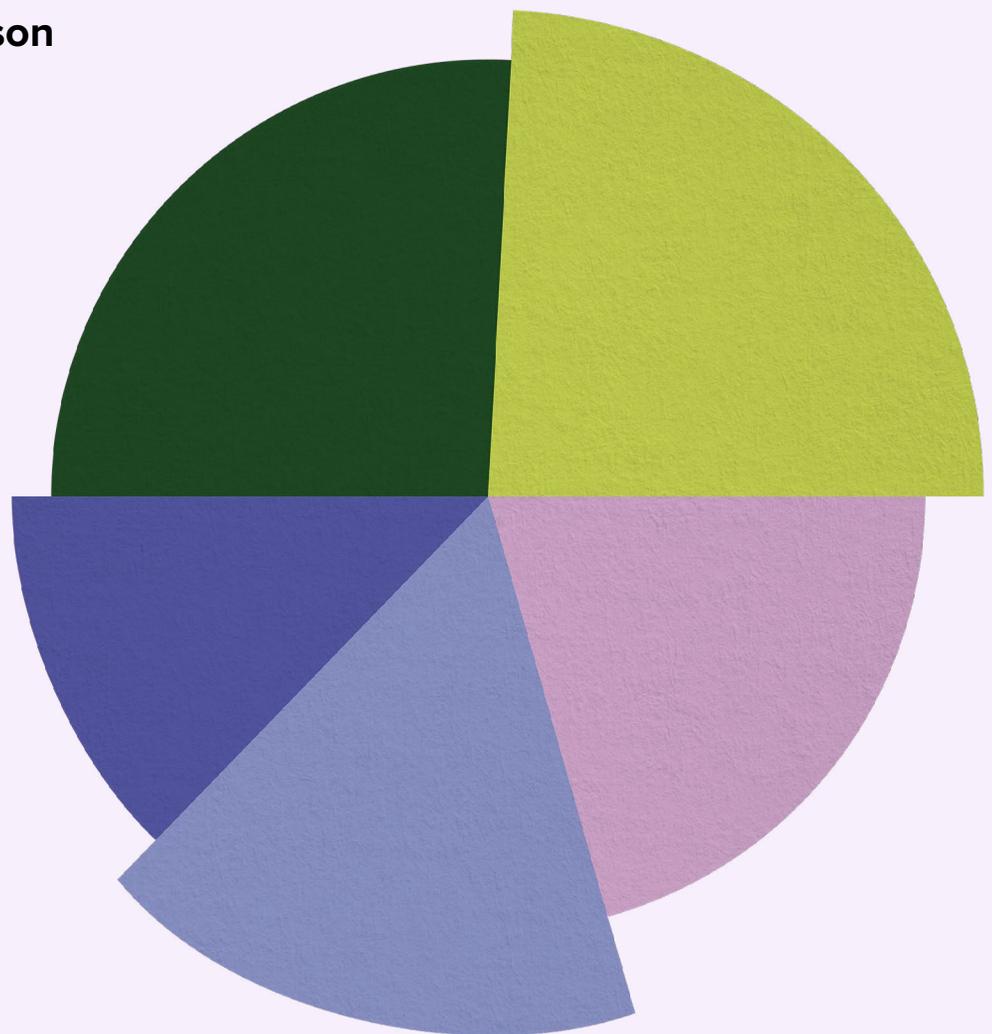
62% indicated 'ease of attending appointments'

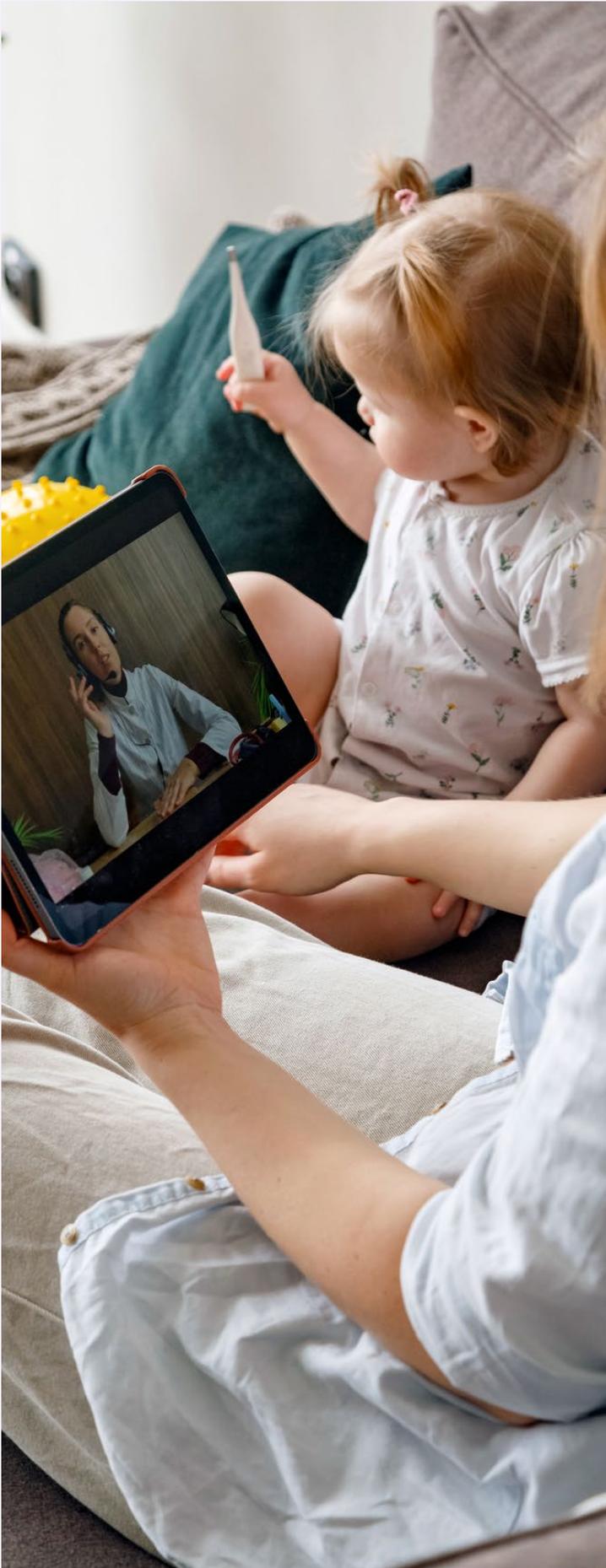
58% indicated 'ability to connect with a doctor sooner'

49% indicated 'reduced chances of contracting COVID-19 or other ailments'

40% indicated 'ability to meet with a physician away from where I live/work'

30% indicated 'ability to see a physician more often'





CONSUMERS ARE NOT FULLY SATISFIED WITH THEIR HEALTHCARE JOURNEY – BUT THEY HAVE IDEAS ON HOW TO IMPROVE IT

In Their Own Words

- Better communication after visits
- I would like for test results to be monitored and compared
- Age-specific counseling and advice
- All over body diagnostic testing
- Goal setting with my doctor, additional preventative appointments during the year, and tracking for specific health measures
- More electronic records/data to access
- More time with physician and the ability to message them on portal between visits
- More customized information
- Availability of at-home testing
- More prevention
- Access to medical records
- Data tracking outcomes and better insight
- More personalization
- Virtual appointments
- Easier access to doctors

THE COMBINATION OF THE PANDEMIC + EVOLVING TECHNOLOGIES HAVE SPARKED HEALTHCARE CONSUMERS TO SEEK OUT NEW SOLUTIONS ALONG THEIR JOURNEYS

With challenges ranging from deferred appointments due to COVID-19 to simply feeling in the dark about their own health data, patients are motivated to change the way they engage with healthcare. This study found that consumers are actively hunting for modern solutions that will elevate the quality of their annual preventive care visit, their control of diagnostic testing, and ultimately their overall well-being. Personalized data and increased accessibility to on-demand tests will allow patients to take tighter control of their healthcare journey and sit more comfortably in the driver's seat of their own health and wellness. While not every consumer is an early adopter (whether by choice or lack of access), over time, tools and services that are currently novel will quickly become mainstays.



ABOUT THE STUDY

The Future of Personalized Healthcare Insights Study 2022 was conducted by Leaf Group in collaboration with QuestDirect and sought to understand perceptions and preferences around telehealth, health data usage, and tech adoption.

QuestDirect is the consumer-initiated testing service powered by Quest Diagnostics - the leader in diagnostic information services for empowering better health – and is rooted in a mission of providing action from insights in order to transform health. Our services are designed to complement traditional

healthcare by empowering people with the information and data they need about their health, preparing them to partner with their healthcare professional to make informed decisions.

Leaf Group believes that living life well is not a concept or privilege reserved for some, but a right to be had by all. We believe in finding solutions and removing barriers to help people do what they love – everyday. Most of all, we believe in our brands and their dedication to making the pursuit of health and wellness accessible to all.



METHODOLOGY

The Health Care Insights Study by Leaf Group was conducted in January 2022 and included one survey fielded exclusively to the Well+Good audience. The consumer survey comprised 1,437 participants aged 18 and older, located throughout the U.S. The respondents represented a general sample of the Well+Good audience, spanning all genders, age groups, incomes and geos.

SOURCE

The Health Care Insights Study by Leaf Group; Well+Good audience only; Fielded January 26 - 30, 2022; n = 1,437