



Book Excerpt 'Primed' Consumer

"Amazon Prime is changing the expectations of patients toward their health care providers. They come from shopping on Amazon and getting a responsive experience, then they seek health care and expect that same level of service."

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An essential factor to consider in the patient experience is what we call the 'priming' of consumers.

Amazon Prime has brought the patient, as a consumer, to a whole new level of expectation. Immediate responsiveness, credibility and empowerment - all enable the consumer to have greater purchasing power.

In 20 years, Amazon has been able to put an entire cohort together of early adopters, aggressive decision makers, and people who are vocal advocates. This group now numbers over 100 million people, who shop twice as fast and buy twice as much.

Tipping point: 51% of households in the US have Amazon Prime

A \$120/year Amazon Prime membership has created the expectation of a two-day turnaround (and in some places it's already same-day). No matter where one lives, the expectation has now been "primed."



Contact:

Bob Baurys
President & CEO
(512) 592-9177

bob@go83bar.com

Compare this to the patient experience. In the past four years, patients have had to wait 30% longer to get an initial first appointment with a provider - an average of 24 days.

You see the disconnect? It's huge.

Implications for health care marketers and providers

Health care marketing now faces a difficult challenge - move highly-empowered consumers through a system that has traditionally put medical providers first.

If you're a provider or a manufacturer, and trying to attract consumers, you are struggling. You need to create consumer demand, but also align this with how people self-manage themselves.

With up-to \$10,000 deductibles, health care has become a consumer retail decision. What used to be an automatic decision because "My doctor told me I needed this" is now a complex decision-making process, with multiple participants ranging from families and providers, to insurers and even employers.

Now getting a procedure or surgery that is the least bit elective is much more like an Amazon-type of thought process environment (research, reviews, feedback compare), rather than the old, "I don't care, I'm going to get it done because my insurance is going to pay for it".

The times have changed as it's definitely a different environment.