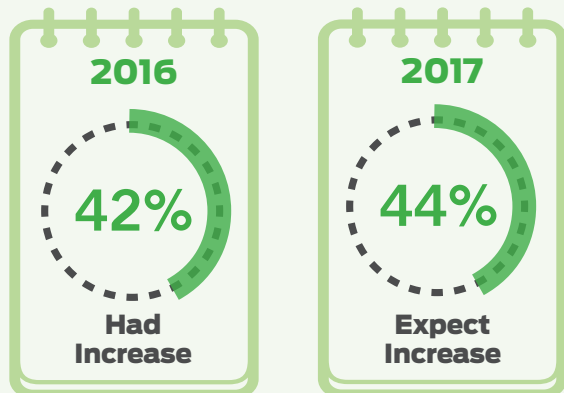


Consumer Demands Are Changing Healthcare

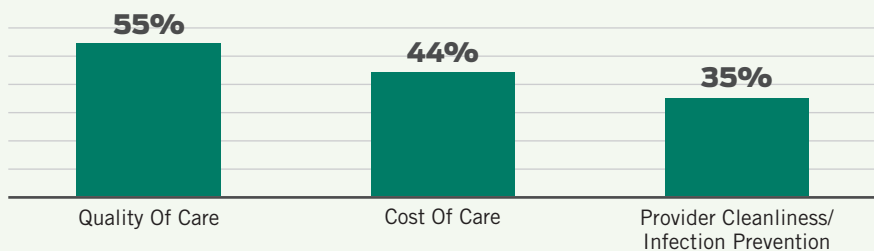
HIDA surveyed 1,000 patients to learn the impact rising expenses have on healthcare decisions. Our Horizon Report, *Healthcare Consumerism: Quality and Cost Driving Patient Behavior*, provides detailed data on how consumerism is a driving force in healthcare. For more information, visit www.hida.org/HorizonReport.

Out-of-Pocket Expenses Increase For Many Patients



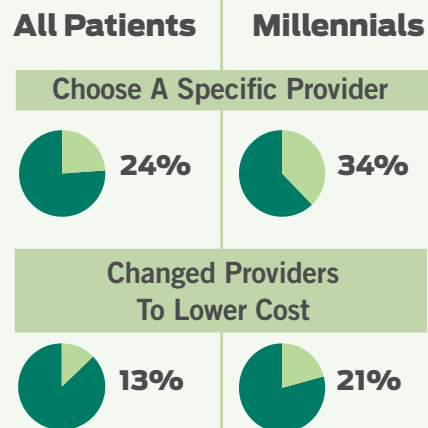
Quality Still Matters Most

Top 3 Factors That Influence Provider Selection



Half of Millennials will pay more out of their own pockets to visit a provider that offers newer technology and products

Younger Patients More Likely To Shop To Manage Costs



Patients Want Transparency

“Providers should combine services, and reduce the number of visits when possible, so one charge can cover treatment.”

— Female, Silent Generation, West



“Have a list of the prices for various procedures and visits.”

— Male, Millennial, Midwest

Source: *Healthcare Consumerism: Quality and Cost Driving Patient Behavior*, Health Industry Distributors Association, 2017