PATIENT EXPERIENCE STARTS WITH PATIENT ACCESS ®

2021 Patient Access Journey Report

Insights from Kyruus' Fifth Annual Survey of 1,000 Healthcare Consumers

INTRODUCTION: THE DIGITALLY-EMPOWERED HEALTHCARE CONSUMER

Over the past 18 months, healthcare organizations drastically accelerated digital strategies, while patient preferences evolved in parallel. The digital transformation is well underway and is a permanent factor in engaging with existing and potential patients, as healthcare consumers make clear their desire to gather information, consider their options, and schedule appointments using digital tools.

To help healthcare organizations uncover new opportunities to attract, convert, and retain patients, Kyruus surveyed 1,000 healthcare consumers across generations and geographies to understand how they prefer to search for, select, and access care. Now in its fifth consecutive year, the *Patient Access Journey Report* provides insights into consumer preferences along the three key stages of the patient access journey:

DISCOVERY: How consumers learn about healthcare providers and/or care options

SELECTION: How consumers weigh options and choose a healthcare provider, service, or care site

SCHEDULING: How consumers book an appointment with the chosen provider or organization

At each point in the journey, healthcare organizations have the opportunity to create a positive interaction and increase the likelihood that the consumer will choose them from the vast array of options in today's highly competitive care delivery landscape. This opportunity starts with understanding consumer perspectives and preferences—today and into the future.

DETAILS ABOUT THIS STUDY

This report is based on a survey of 1,000 consumers conducted by Wakefield Research on behalf of Kyruus in August 2021. All survey respondents searched for a provider for themselves in the prior two years and over 80% had done so within the prior 12 months. Respondents were from across the United States and represented a comparable mix of private insurance and Medicare or Medicaid from four age groups (18-34, 35-49, 50-64, and 65+ years).[1]

Similar to previous editions, our findings look at three key generational segments:

- Millennials (ages 25-40)
- Gen Xers (ages 41-56)
- Baby Boomers (ages 57-75)

1. After weighting, approximately half of respondents had private insurance, 45% had Medicare or Medicaid, and the remainder had Military / VA insurance or were uninsured.

KEY FINDINGS

The majority of consumers conduct online research when looking for new providers and healthcare organizations' websites are the most frequently consulted online resource, with 60% of online researchers turning to a hospital, health system, and/or medical group website.

Online research plays a substantial role in the search for healthcare services and care sites as well as providers. Nearly 60% of consumers used the internet when searching for a new service or care site, most often performing a general internet search (e.g., via Google) (60% of online researchers) and/or visiting a healthcare organization website (58%).

Health plan websites have taken a more prominent role in the patient access journey, with over half of online researchers now consulting a health plan website at some point in their search. While the top reason consumers visited health plan websites was to verify that a provider (found elsewhere) was in-network (66%), more than half visited them to search for a new in-network provider.

When selecting a new provider, consumers continue to prioritize factors related to cost, convenience, and clinical expertise. Their top criteria are insurance acceptance, clinical expertise on their condition, reputation of the hospital or health system, and appointment availability. Relatedly, nearly all insured consumers said they consider cost-related information when selecting a new provider or service.

Booking preferences have continuously shifted away from the phone and towards digital channels over the past five years, with the percentage of consumers that prefer to book online increasing by 15 percentage points between the 2017 and 2021 surveys. This shift was most pronounced among Millennials and Gen Xers, while Baby Boomers' preferences have changed more gradually.

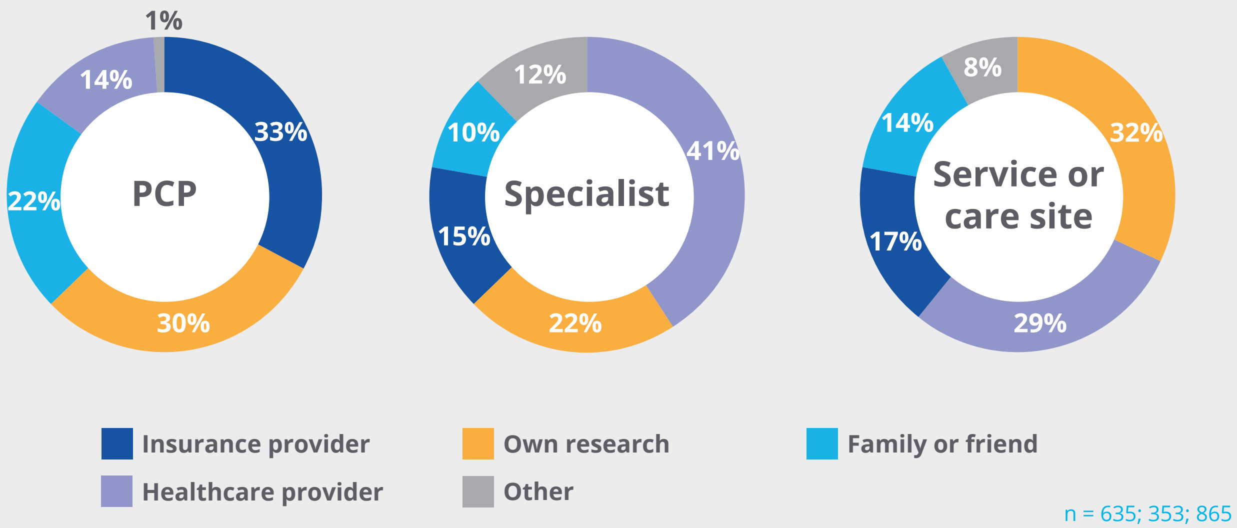
DISCOVERY: DIGITAL CHANNELS AND HEALTHCARE ORGANIZATION WEBSITES DOMINATE, WITH HEALTH PLANS ON THE RISE

The patient access journey is rarely linear, with consumers often consulting a variety of resources to find a new healthcare provider or service. While the data from this year's survey underscores the continued prominence of independent research, for the first time in this report's five-year history, health plans slightly nudged out independent research as the top way consumers ultimately found a new primary care provider (PCP). When it comes to finding a specialist, however, the top three methods remained the same across all five years: from a provider referral or recommendation, through their own research, and via health plans.

A brand new research area in this year's survey looked at how consumers find healthcare services or care sites, such as vaccines, testing / lab services, imaging facilities, urgent care centers, or on-demand virtual visits. The findings revealed a significant role for independent research, which came in as the number one answer (32%), followed by a provider referral or recommendation (29%), and health plans (17%).[2]

Figure 1. How Consumers Find New Healthcare Providers and Services[3]

How did you find the new [primary care provider / specialist / healthcare service or care site]?



When it comes to the specific resources consumers consult to evaluate potential providers, for the fifth year in a row, the internet dominated: nearly 60% of consumers conducted online research to learn about providers—up five percentage points in the past five years. Gen Xers were the most likely to turn to the internet at 64%, versus 60% for Baby Boomers and 56% for Millennials. Across all generations, other top resources were a healthcare provider (45%), a family member or friend (34%), and a health plan (by phone) (27%). The results revealed similar patterns for healthcare service or care site research: the internet (58%) was number one, followed by a healthcare provider (47%), a family member or friend (29%), and a health plan (by phone) (24%).

2. Of the consumers surveyed, 86% had searched for a new healthcare service or care site in the past two years, with the top service types being vaccination services (49%), testing or lab services (42%), imaging services (32%), and urgent care (31%).
3. PCP and Specialist data and percentages exclude respondents who said that they were still looking and had not yet found a provider.

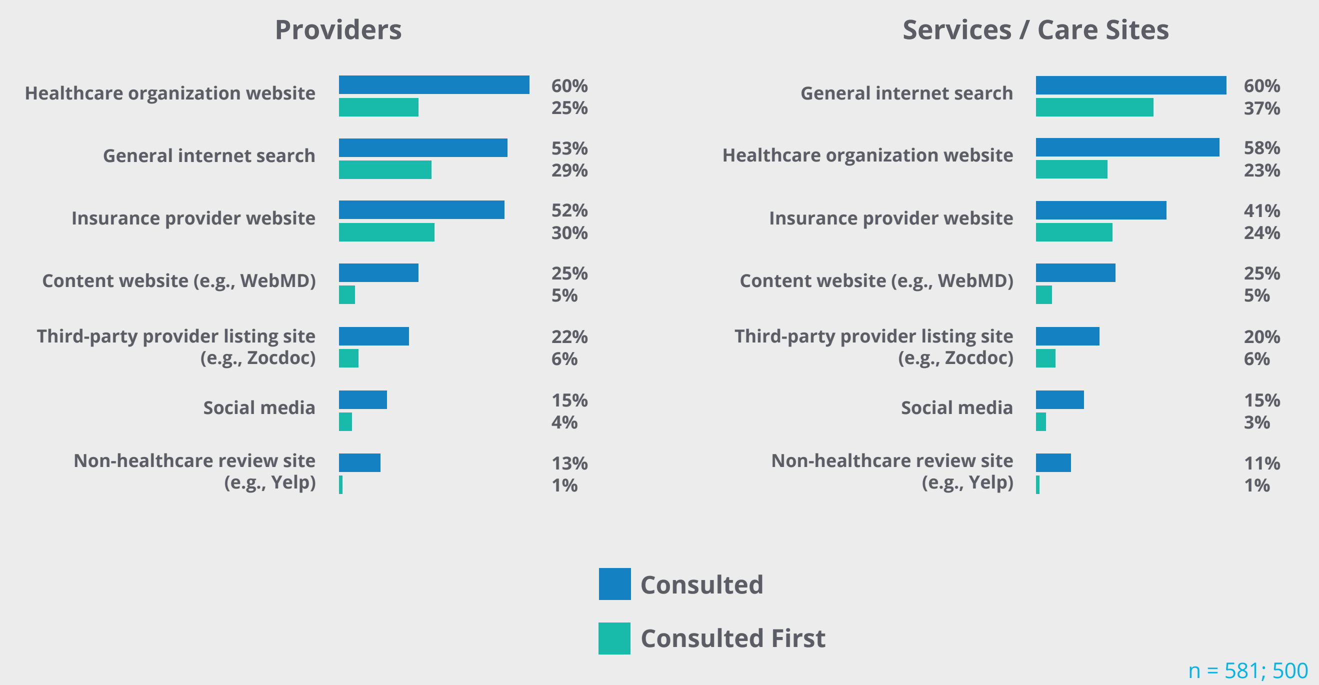
Taking a more granular look at consumers' online research behavior, when searching for new providers, the top two resources consumers utilized were healthcare organization websites (60%)[4] and general internet searches (e.g., via Google) (53%). Among those using search engines, over 60% reported that they typically search for a doctor "near me" or "near town/city," and half search by condition or medical specialty. Results were similar for consumers looking for a new service or care site, but they were slightly more likely to conduct a general search (60%) versus consulting a healthcare organization website (58%)[5] for these searches.

Health plan websites took a more prominent role in the patient access journey this year, with over half (52%) of online researchers consulting one in their search for a new provider—up more than ten percentage points from last year. Additionally, health plan websites are now the top resource consumers consult first (30%) when searching for new providers online, edging just ahead of general internet searches (29%) and healthcare organization websites (25%).

When asked why specifically they visited a health plan website, consumers' top reasons were to verify that a provider (found elsewhere) was in their plan's network (66%), search for an in-network provider (51%), and estimate out-of-pocket costs for a chosen provider (25%). Also of note, among respondents who conducted online research to find a new service or care site, 41% said they consulted a health plan website, with 24% going there first.

Figure 2. Consumers' Top Online Resources for Healthcare Provider and Service Information

Which resources, if any, did you consult in your online search for a healthcare [provider / service or care site]?
Which resource did you consult first?

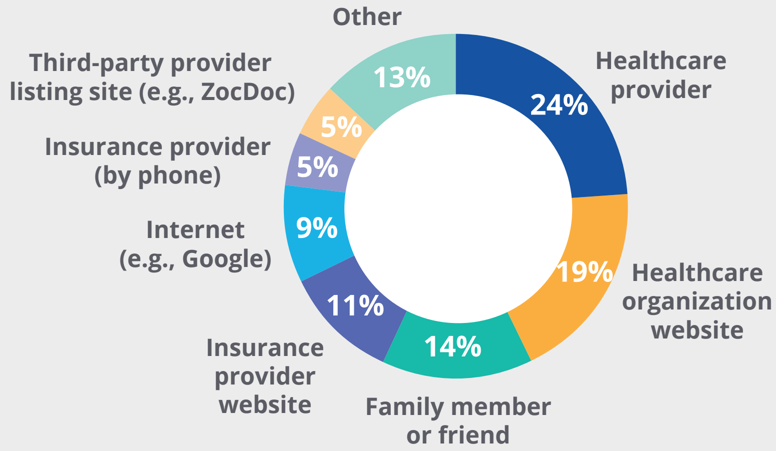


4. Combined metric: 18% consulted a health system / hospital website (only), 22% consulted a medical group / practice website (only), and 20% consulted both.
5. Combined metric: 20% consulted a health system / hospital website (only), 20% consulted a medical group / practice website (only), and 19% consulted both.

In response to a new survey question about which resources consumers consider most trustworthy when researching new providers or services, 24% said a healthcare provider (e.g., doctor or nurse practitioner) followed by a healthcare organization website (19%)[6] and a family member or friend (14%). Despite the increasing prominence of health plan websites in the patient access journey, only 11% of consumers said they consider health plan websites the most trustworthy resource.

Figure 3. Resources that Consumers Consider Most Trustworthy for Provider or Service Information

Which of the following do you consider to be the most trustworthy resource when looking for information about a new healthcare provider or service?



n = 1,000

KEY TAKEAWAYS

- **Consistent with the digital-first mindset of today's consumers, the internet plays a significant—and growing—role in healthcare consumers' discovery process for finding both healthcare providers and services / care sites.**
- **When it comes to online research, healthcare organization websites, health plan websites, and general internet searches all feature prominently for consumers, underscoring the need to optimize providers' representation across these key digital channels.**
- **Although health plan websites play an increasingly prominent role in the search process for providers and services, they lag behind when it comes to consumers' perceptions of which resources are most trustworthy for this type of information.**

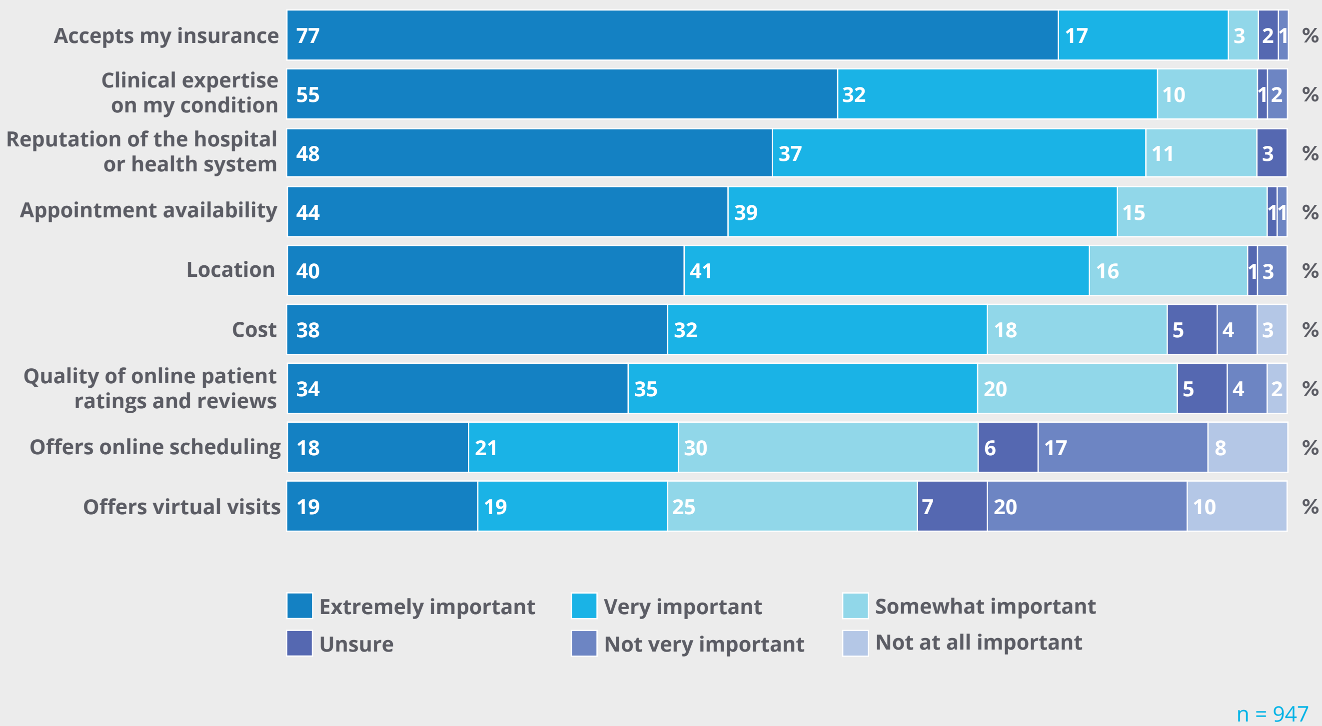
6. Combined metric: 10% selected health system or hospital website and 9% selected medical group or practice website.

SELECTION: CONSUMERS PRIORITIZE FACTORS RELATED TO COST, CONVENIENCE, AND CLINICAL EXPERTISE

When consumers start to narrow down their choices, they value detailed information about potential providers and care options. Over the five years of this report, consumers' opinions have stayed relatively consistent regarding the criteria that matter most when selecting a new provider—namely, factors related to cost, convenience, and clinical expertise. The top criteria (based on share of respondents rating the factor very or extremely important) continue to be insurance acceptance (94%), clinical expertise on their condition (87%), reputation of the hospital or health system (84%), and appointment availability (83%). Another key convenience-related factor, location, closely followed availability at 81%.

Figure 4. Most Important Criteria for Consumers When Selecting a Provider

How important, if at all, are each of the following factors when selecting a new healthcare provider?

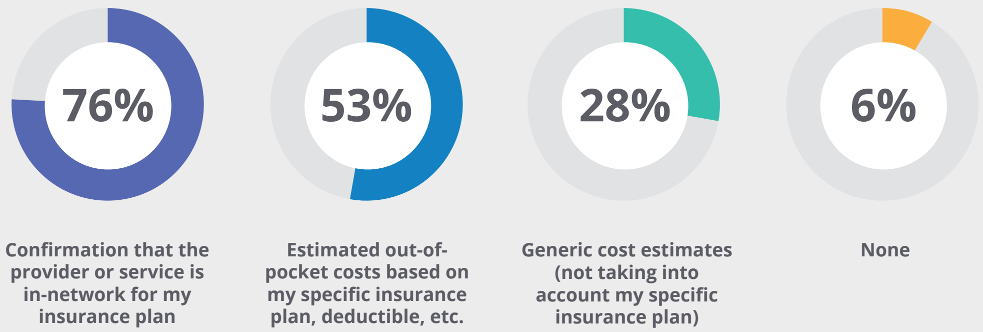


Given the growing spotlight on transparency into cost of care, this year's survey also included new questions to further assess consumers' cost considerations when selecting a new provider or service. Among those with insurance, nearly all respondents (94%) said that they take cost-related information into account. More specifically, three-quarters look for confirmation that the provider or service is in-network for their health plan and over half consider estimated out-of-pocket costs based on their specific plan, deductible, etc. Only 28% reported utilizing generic cost estimates that don't account for their specific plan.

Before selecting a new healthcare provider or service, more than 80% of respondents said that they compare expected out-of-pocket costs across different providers or care options (for at least one applicable care type). Results indicate they are most likely to compare costs for primary care providers and specialists, followed by options for testing or lab services, urgent care/retail clinic visits, and major procedures.

Figure 5. Cost-Related Information Consumers Consider When Selecting a New Provider or Service

When selecting a new healthcare provider or service, what cost-related information do you consider in your decision-making process?



Note: Respondents were able to select multiple options

n = 947

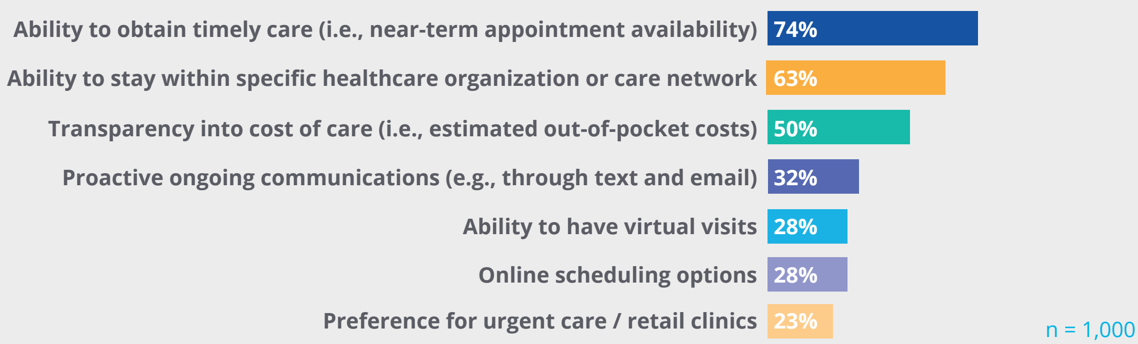
Care delivery considerations factor into the selection process as well, with virtual and convenient care methods remaining popular. For example, when asked about their preferred method of obtaining care for acute care needs specifically, 33% of all consumers chose an urgent care or retail clinic and 17% chose a virtual visit (the other half prefer to visit their primary care provider / office in person). Consistent with prior years, overall, 40% said they had visited an urgent care clinic and 37% a retail clinic in the past 12 months. Also consistent with 2020 survey findings, almost 40% of consumers cited access to virtual visits as a very or extremely important decision factor in this year's survey.[7]

Looking at factors that will influence consumers' future decisions about where and from whom they would obtain care, nearly three-quarters of respondents ranked the ability to obtain timely care (e.g., near-term appointment availability) within their top three. This was even more pronounced for Baby Boomers, with 89% including timely access in their top three. Across all generations, other key factors were the ability to stay within a certain healthcare organization or care network (63%) and transparency into cost of care (50%).

7. The 2020 survey was the first year in which virtual care was included within the selection criteria quetion.

Figure 6. Factors That Will Impact Where Consumers Will Seek Care in the Future

In the future, which of the following will have the biggest impact on your decisions about where and from whom you'll obtain care? Please select your top 3 responses.



While survey respondents shared what will impact their future decisions about where to receive care, it is important to note that many still plan to delay care. In fact, almost half (45%)[8] said they are hesitant to seek in-person care as the COVID-19 pandemic continues, and 43% reported that they either plan to delay applicable routine care (e.g., annual check-ups or screenings) (26%) or are unsure (17%). Across generations, Millennials are the most hesitant to seek in-person care, with 56% saying they are very or somewhat hesitant (versus 47% of Gen Xers and 35% of Baby Boomers). Additionally, more than half (56%) of Millennials said they either plan to delay routine care or are unsure, compared to 45% of Gen Xers and 30% of Baby Boomers.

KEY TAKEAWAYS

- **Organizations that provide the information that consumers value most—criteria related to cost (e.g., insurance acceptance), convenience (e.g., appointment availability, location), and clinical expertise—will be in the best position to convert online consumers into patients.**
- **Nearly all insured respondents reported taking cost-related information into account when selecting a new provider or service, suggesting that transparency into expected out-of-pocket costs could play an increasingly important role in consumer decision-making.**
- **Consumers continue to prioritize convenient and flexible access to care, as shown by the importance of timely access to appointments and the lasting popularity of virtual and convenient care methods.**

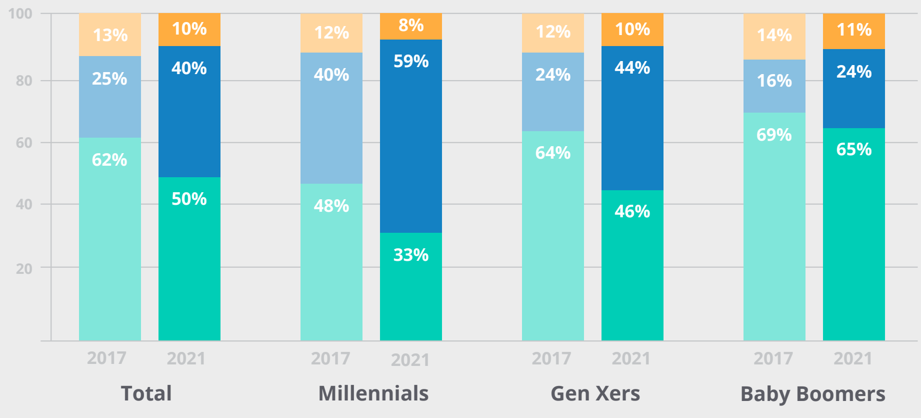
8. Combined metric: includes repondents who said they were either very or somewhat hesitant to seek in-person care.

SCHEDULING: PREFERENCES HAVE SHIFTED TOWARDS DIGITAL SELF-SERVICE

Over the past five years, consumer preferences for medical appointment scheduling have shifted significantly away from the phone and towards online booking channels. While still the most preferred method—cited by half of respondents in this year's survey—phone-based booking has declined in popularity by 12 percentage points in the past five years. Meanwhile, 40% of consumers overall prefer to book via online channels (up 15 percentage points since the 2017 survey). The growing shift towards self-service booking was the most pronounced among Millennials and Gen Xers, while Baby Boomers' preferences have changed only marginally.

Figure 7. Consumers' Preferred Means of Booking an Appointment Over Time

Given the following options, what is your most preferred means of booking an appointment?

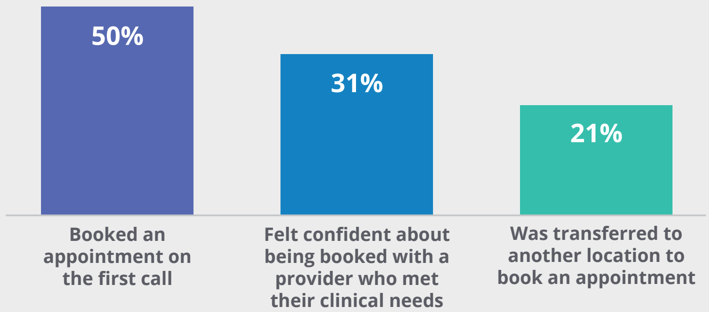


n = 1,000

For consumers who do try to book via phone, survey results reveal that access challenges persist. For example, when they last called a hospital or health system call center to book an appointment, only half of consumers were able to successfully book an appointment on the first try—a pattern consistent with prior survey results. In addition, less than one-third of consumers said they were confident that they received an appointment with a provider who would meet their clinical needs—down five percentage points from 2019.

Figure 8. Top Call Outcomes for Consumers Seeking an Appointment by Phone

When you last called a hospital or health system call center to book an appointment, which of these options, if any, described your experience?

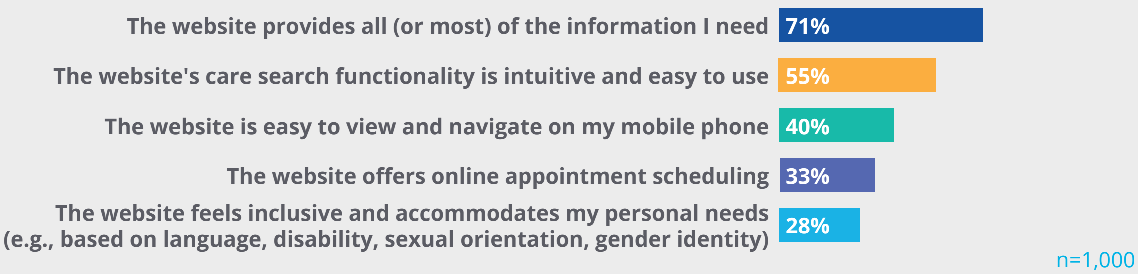


n = 1,000

Given growing consumer preference for digital access channels, this year's survey included a new question focused on gaining more insight into what constitutes a quality digital access experience. The top two factors contributing to a quality digital experience—with 50% or more respondents citing them in their top three—were the website providing all (or most) of the information needed (71%) and having an intuitive and easy-to-use care search functionality (55%). More than a third also noted the website being easy to view and navigate on a mobile phone (40%) and offering online scheduling (33%) as important factors, while 28% cited the importance of the website feeling inclusive and accommodating of personal needs.

Figure 9. Consumers' Top Five Factors that Contribute to a Quality Digital Experience

In your opinion, what are the top 3 factors that contribute to a quality digital experience when searching online for a new healthcare provider or service?



When asked specifically about their digital experiences in two key access channels, healthcare organization websites and health plan websites, almost half of consumers[9] said the healthcare organization website provided better quality provider information and a better provider search and scheduling experience. While one-third felt that the health plan website offered a better experience—in terms of both the quality of provider information and the provider search and scheduling experience—the remaining respondents (approximately 20%) did not report a difference in quality.

KEY TAKEAWAYS

- **The patient access journey continues to span multiple channels—online and offline—underscoring the need to provide accurate and consistent information about providers, services, and care sites across key access points.**
- **While digital innovation is front and center, healthcare organizations have an important opportunity to close gaps in the patient access experience by phone—still the preferred method of booking overall.**
- **Organizations can engage and delight online consumers by offering a mobile-friendly experience that provides robust information and an intuitive search experience encompassing all available care options.**

9. Of those who had visited both a healthcare organization website and a health plan website in their most recent search (n=176).

CONCLUSION: CONSUMER INSIGHTS INFORM ROADMAPS FOR SUCCESS

The world has changed, and healthcare has changed along with it. Five years of research into healthcare consumers' access experiences and perspectives demonstrates that digital initiatives are not just nice-to-have; a robust and expanding digital strategy is vital to the success of every healthcare organization. Consumers are looking for detailed resources, sophisticated filtering capabilities, and mobile-friendly experiences. Healthcare organizations can and must create a modern patient access experience—encompassing how consumers schedule care to what options they have for where to receive it—in order to succeed in today's competitive landscape. Insights into what consumers want most at each stage of the patient access journey provide a roadmap for healthcare organizations to prioritize their strategies, execute programmatically, and, ultimately, successfully achieve their patient experience and acquisition goals.

Interested in more insights on patient perspectives? Don't miss our other research in the Kyruus Resource Library at ***www.kyruus.com/resources***