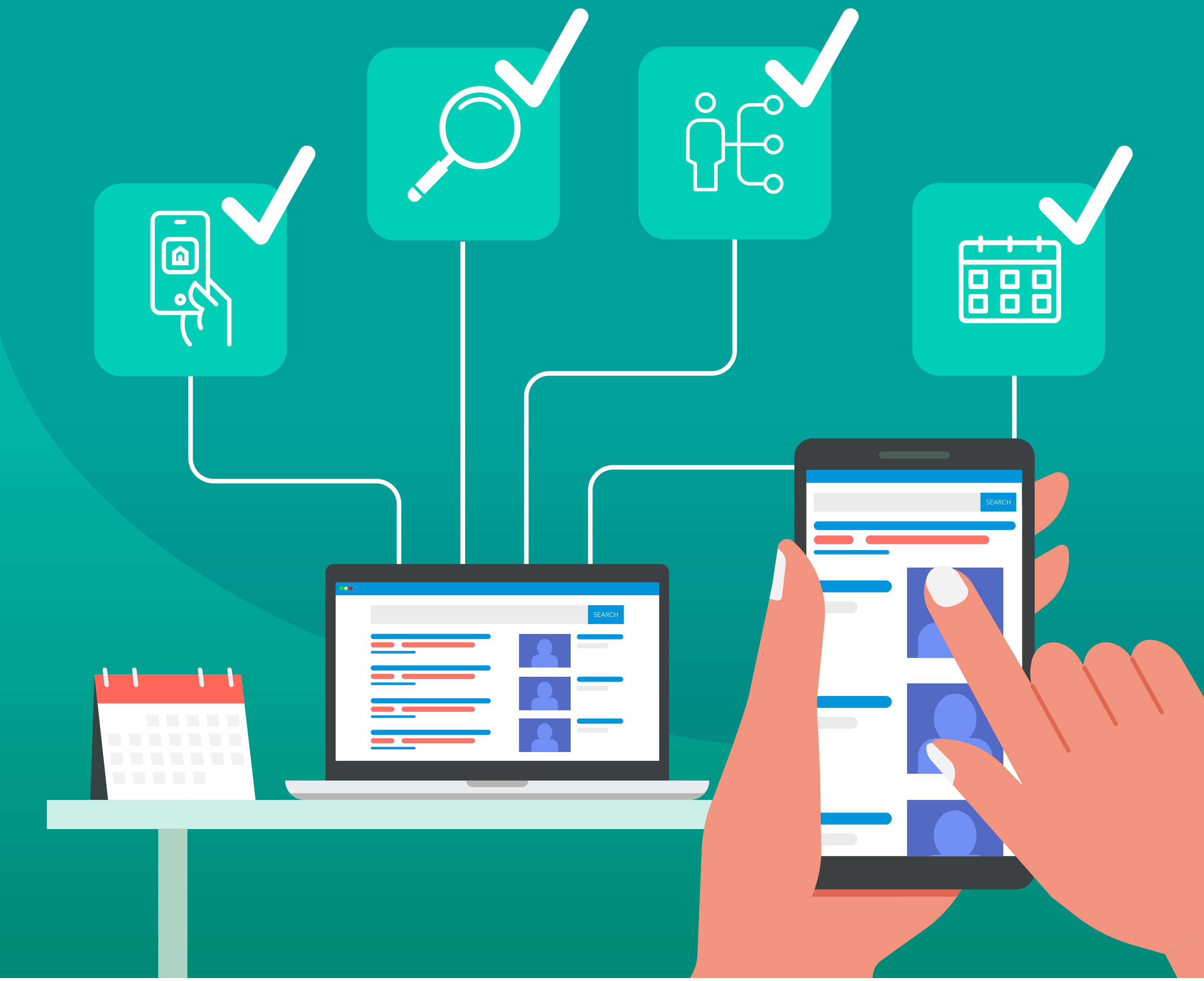
The State of Digital Patient Access

A Look at How the Top 20 US Health Systems Enable Consumers to Find and Schedule Care Online



INTRODUCTION

Successful new patient acquisition relies on a strong digital access experience that meets the ever-evolving needs of healthcare consumers. With rising demand for convenient, self-service access to care, healthcare organizations have accelerated digital initiatives to effectively engage consumers and convert their demand to booked appointments online. However, even with the recent acceleration of digital innovation, health systems continue to face pressure from rising consumer expectations, online competition, and pandemic-related financial strain—all while trying to optimize digital patient engagement. With these ongoing challenges, how are leading health systems advancing their digital patient access experiences to engage, convert, and retain consumers online?

To help answer this question, and better understand the current digital patient access landscape, Kyruus assessed the top 20 *US News and World Report* ranked hospitals,[1] evaluating them across four key categories representing the main stages of the digital patient access journey:

ENGAGE — **CONSUMER ENGAGEMENT TOOLS:**
Meeting online consumers where they are in their search for care

SEARCH — **EASY AND MODERN SEARCH EXPERIENCE:**
Providing an intuitive, easy-to-use find-a-provider experience

MATCH — **CONSUMER-CENTRIC FILTERING OPTIONS:**
Enabling consumers to narrow search results based on key criteria

BOOK — **SELF-SERVICE BOOKING CAPABILITIES:**
Offering seamless online scheduling for new and existing patients

DETAILS ABOUT THIS ASSESSMENT

This report is based on a digital patient access assessment conducted by Kyruus in July of 2021 on the 2020-2021 top-ranked *US News and World Report* hospitals.[2] Kyruus assessed the top 20 hospitals based on 12 criteria critical to providing a modern, consumer-centric digital access experience and converting online demand. For the full assessment, see page 7 of this paper.

ENGAGE: CONSUMER ENGAGEMENT TOOLS

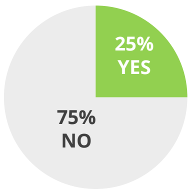
The patient access journey is increasingly complex and non-linear, often comprising multiple digital touchpoints for a single episode of care. As consumers find their way to a healthcare organization's website, they expect an engaging and modern experience to help them find appropriate care. When it comes to the engagement phase, digital patient access tools—such as virtual assistants, prominent calls to action (CTAs), and mobile apps—are crucial for supporting online consumers and guiding them to the organization's care search solution when needed.

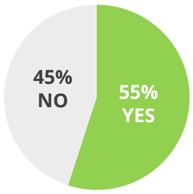
Virtual Assistants: Virtual assistants (or "chatbots") have become popular with healthcare consumers: of those who used one on a health system or hospital website, nearly 3/4 found them helpful in finding a new provider or service.[3] These tools serve as a way to engage with consumers at the early stages of their journey, helping guide them to the tools and resources they need. Despite the potential for positive impact on patient experience and acquisition, significant opportunity remains for the nation's top health systems: only 1/4 of health systems assessed had a virtual assistant live to assist consumers.[4]

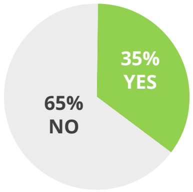
Prominent Calls to Action: Calls to action are key to guiding consumers to take action on online. They should be clear, prominent, and embedded throughout—signaling to consumers that they have both online and offline scheduling options such as "Book an Appointment Online" or "Call for an Appointment Today". More than half (55%) of the top health systems provide prominent, helpful CTAs around both phone access and online scheduling options across their websites—enabling access no matter where a consumer enters the experience or where they go once there.

Mobile Apps: Mobile-first digital experience is also a factor in effectively engaging online consumers. Consumers are increasingly turning to mobile apps with nearly 90% of mobile users' time online taking place in apps (versus a mobile browser).[5] This increased popularity presents an opportunity to enhance digital access for both new and existing patients. However, while many of the top 20 health systems have mobile apps for existing patients (e.g., a patient portal app), just over 1/3 (35%) have a mobile app that enables new patients to find and schedule care without requiring them to create an account upfront.

Top Health System Results







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KEY OPPORTUNITIES FOR HEALTHCARE ORGANIZATIONS:

- **Guide consumers through the process of finding the right care** by giving them end-to-end self service through tools like virtual assistants.
- **Capture demand at any stage of the patient journey** by incorporating consistent, bold calls to action for provider search and scheduling across your website, including your homepage, service line pages, provider profiles, and blogs.
- **Convert mobile users** by providing both a mobile-optimized website experience and a mobile app that includes your care search and scheduling options—for new and existing patients.

SEARCH: EASY AND MODERN SEARCH EXPERIENCE

Health system websites consistently emerge as one of the most highly used sources to search for care online, with almost half of online researchers visiting a health system or hospital website when looking for a new healthcare provider.[6] Because of this, it's critical that health systems continually optimize website search and find-a-provider search to simplify the process for consumers. The care search experience should offer key elements such as clinical keyword search, typeahead autocomplete, and consistent provider and location information—both in the find-a-provider search and global search—creating an experience that is easy-to-use, intuitive, and predictive of consumer behavior.

Clinical and Synonym-Based Keyword Search: Enabling consumers to search by a variety of clinical keyword types—as opposed to limiting searches to basic specialty or provider name—creates a more inclusive and user-friendly care search experience. Mapping clinical keywords to lay terms and synonyms in the underlying taxonomy also allows consumers to search in their own words, making it easier for them to arrive at the best matches for their needs without needing to know specific clinical terminology. Most of the top hospitals assessed understand the impact that flexible, keyword-based search can have—with 3/4 providing the option to search by clinical or lay term in their find-a-provider.

Typeahead Autocomplete: Predictive search results also simplify the search experience for consumers, providing analytics-driven suggestions based on previous search data and keyword mapping. Typeahead functionality can be particularly useful if there is a robust clinical taxonomy in place, showcasing predictive results based on a variety of categories, such as specialty or condition. The large majority of top US health systems offer this feature, with 85% providing typeahead functionality in their find-a-provider search bar.

Integrated Global Search: Looking beyond the find-a-provider, consumers may also leverage global site search when trying to find care. As consumers look to health system websites as key information sources, there is additional opportunity for organizations to offer an enhanced overall global search that incorporates the same provider and location data available within the find-a-provider. Over half (55%) of health systems assessed integrated data from their find-a-provider experience in their global search results, segmenting them by provider and location options.

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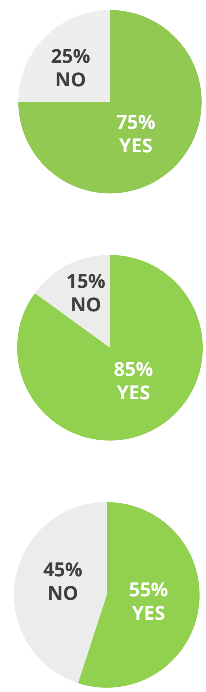

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KEY OPPORTUNITIES FOR HEALTHCARE ORGANIZATIONS:

- **Surface the most relevant search results** by providing a robust and intuitive search experience—expanding beyond search by provider name and specialty—that allows users to type in a variety of clinical search terms and lay synonyms.
- **Meet consumer needs more effectively** by leveraging analytics-driven typeahead—providing suggestions based on the most commonly searched terms—and natural language processing—to process more complex searches overall.
- **Enhance the care search experience** by providing accurate and consistent information throughout the search process with integrated global search, including both provider and location information.

MATCH: CONSUMER-CENTRIC FILTERING OPTIONS

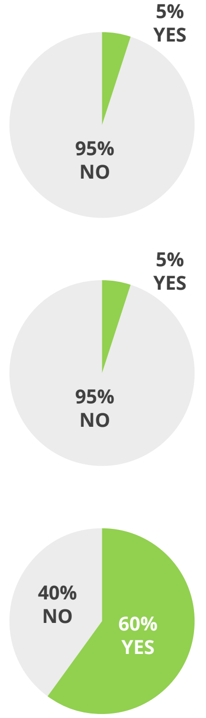
Enabling consumers to sort and filter their search results by the criteria that matter most will help them more quickly and confidently select a provider or care option (e.g., urgent care clinic, on-demand virtual visit) that matches their needs and preferences—improving online conversion as well as both patient and provider satisfaction. Prospective patients also want access to detailed information about the providers or services that they are considering, making up-to-date, rich provider and location profiles crucial to their experience.

Top Preference Filters: According to Kyruus' annual research, appointment availability and location top the list of criteria consumers consider when selecting a new provider.[7] Additionally, consumers are increasingly interested in understanding if virtual care options are available: over 60% of consumers said access to virtual care will impact their choice of where to obtain care in the future.[8] However, of the top 20 health systems, only one had a find-a-provider with sorting and/or filtering options for location, availability, *and* virtual care options. Notably, 70% did include location sorting/filtering capabilities, but only 15% enabled users to sort/filter by virtual care.

Appointment Availability in Search: Over 80% of healthcare consumers said that appointment availability was very or extremely important when selecting a new healthcare provider.[9] Consumers will continue to value convenience as they think about selecting care post-pandemic as well, with consumers citing the ability to obtain timely care is a key decision making factor.[10] Displaying real-time availability in search gives consumers the priority information they are looking for, allowing them to select the most convenient choice for care. Significant opportunity remains in this area, as only one (5%) of the top 20 US health systems indicated which providers had upcoming availability or showcased real-time availability in search results.

Detailed Provider Profiles: Rich, detailed provider profiles are also central to facilitating the right patient-provider match and increasing online conversion. Kyruus' analysis of aggregate customer data revealed that certain key elements of a provider profile greatly boost online conversion rates—such as patient ratings and reviews (9x), clinical expertise (8x), accepted insurances (4x), provider profile picture (3x), and appointment availability (3x).[11] When looking at these top criteria, 60% of health systems had rich profiles that included the aforementioned conversion-boosting elements. However, 40% of health systems lacked some of them, with ratings and reviews, appointment availability, and professional statements missing from a majority of profiles.

Top Health System Results



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KEY OPPORTUNITIES FOR HEALTHCARE ORGANIZATIONS:

- **Personalize the patient-provider matching experience** by enabling sorting and filtering options based on the criteria most important to consumers, including availability, location, and virtual care access.
- **Provide added convenience by surfacing appointment availability** before consumers select a provider or service—avoiding the need for them to backtrack in their matching process, which may hinder both their satisfaction and conversion.
- **Showcase key information important to consumers** by optimizing your provider profiles to include elements which are proven to increase conversion such as clinical expertise, ratings and reviews, and profile images.

BOOK: SELF-SERVICE BOOKING CAPABILITIES

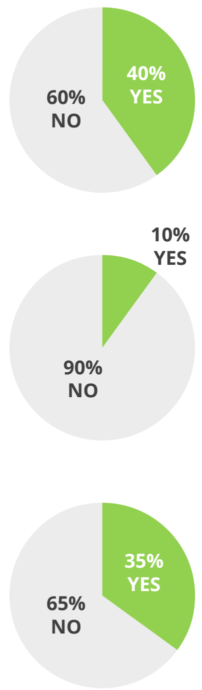
Consumers increasingly want convenient, digital self-service access to care, with over 40% of all consumers now preferring to book medical appointments online—an increase of 11 percentage points year over year.[12] While enabling this functionality for individual provider appointments is a great first step to provide the convenience consumers seek, it is important that health systems continue to expand booking options to incorporate a growing array of different types of healthcare services.

Provider Scheduling: Enabling online scheduling is critically important to the consumer experience. Consumers continue to prioritize access to online scheduling in their choice for care—with almost 60% of those who prefer online booking saying they'd switch providers to have this option.[13] Many health systems offer online scheduling for already established patients—for example, through a patient portal—but have not yet invested to convert online demand from new patients. Among the top US health systems, less than half (40%) offer online scheduling for new patients within their find-a-provider, uncovering a major gap in online patient access.

Service-Based Scheduling: While provider-centric online scheduling is the most prominent opportunity for health systems to capitalize on, consumers are now thinking more broadly about scheduling care online—for services like urgent care, imaging, labs, vaccines, and more. However, only 10% of health systems in this assessment offered online scheduling for broader healthcare services (i.e., beyond scheduling an appointment with a specific provider) within their find-a-provider search—showcasing another area where health systems can differentiate themselves to online consumers.

Virtual Care Scheduling: Consumers are also interested in the flexibility of hybrid care models allowing them to receive care through a combination of virtual and in-person visits. For example, over 40% of consumers indicated a preference for accessing routine or mental health care services virtually or through a combination of virtual and in-person visits.[14] However, only 35% of the top US hospitals offer new patients the option to schedule a virtual visit online within their find-a-provider. Providing the flexibility of virtual care options, such as on-demand urgent care or scheduled visits across a variety of providers and services, is a key differentiator for health systems online.

Top Health System Results



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KEY OPPORTUNITIES FOR HEALTHCARE ORGANIZATIONS:

- **Increase online conversion** by providing seamless, integrated online consumer scheduling directly within your find-a-provider.
- **Attract both new and existing patients** by enabling scheduling for individual providers and additional care options (e.g., urgent care, imaging, labs).
- **Meet consumer demand for virtual and hybrid care** by offering online access to virtual care visits through your find-a-provider.

CONCLUSION

The race to keep up with changing patient access preferences continues to present major opportunities for improvement in the digital landscape. Many of the nation's top hospitals and health systems excel at engaging patients with effective on-site CTAs, but lack consumer-centric tools like virtual assistants and mobile apps. The search experience is clearly a priority for these organizations, with an emphasis on the importance of keyword search, typeahead, and global search integration. However, there is a distinct opportunity to provide more consumer-centric self-service options both for selecting care and booking appointments online. As hospitals and health systems look ahead, they should prioritize creating an end-to-end digital access experience: engaging consumers proactively, converting their interest to booked appointments and offering the convenience and flexibility that keeps them coming back to arrange future care online.

Want to see how your online care search and scheduling experience stacks up? Request an in-depth Find-a-Provider Assessment today.

1. US News and World Report, Best Hospitals Honor Roll , 2020-2021.
2. Kyruus assessed the named entity in the *US News and World Report* rankings, which, in some cases, was an individual hospital versus health system.
3. Kyruus, Patient Access Journey Report, 2020.
4. One hospital provided a virtual assistant with COVID-19 assistance only.
5. Yoram Wurmser, The Majority of Americans' Mobile Time Spent Takes Place in Apps, eMarketer, 2020.
6. Kyruus, Patient Access Journey Report, 2020.
7. Kyruus, Patient Access Journey Report, 2020.
8. Kyruus, Patient Access Preferences Report: The Pandemic's Lasting Impact, 2021.
9. Kyruus, Patient Access Journey Report, 2020.
10. Kyruus, Patient Access Preferences Report: The Pandemic's Lasting Impact, 2021.
11. Kyruus analysis based on aggregate customer data from ProviderMatch Analytics, 2020.
12. Kyruus, Patient Access Journey Report, 2020.
13. Kyruus, Patient Access Journey Report, 2020.
14. Kyruus, Patient Access Preferences Report: The Pandemic's Lasting Impact, 2021.

COMPLETE FINDINGS: DIGITAL PATIENT ACCESS ASSESSMENT OF THE TOP 20 US HOSPITALS

	YES	NO
ENGAGE		
Do they offer a virtual assistant or chatbot that serves as a patient access resource (e.g., helps enable or guide provider search and/or scheduling)?	25%	75%
Do they include prominent calls to action (CTAs) for online scheduling and phone access across their site (e.g, on the homepage, service line pages, blogs etc.)?	55%	45%
Do they have a mobile app that allows consumers to find and schedule care online?	35%	65%
SEARCH		
Do they offer clinical and lay term keyword search in the find-a-provider experience?	75%	25%
Do they enable typeahead functionality in the find-a-provider experience?	85%	15%
Does the global site search experience incorporate providers, locations and services available in the find-a-provider experience?	55%	45%
MATCH		
Can consumers filter by key needs and preferences (e.g., availability, location, and virtual care options) when selecting care in the find-a-provider experience?	5%	95%
Can consumers see availability in provider search results (e.g., next available provider or real-time availability information)?	5%	95%
Do a majority of the profiles include robust, conversion-boosting data elements (e.g., profile picture, appointment availability, patient ratings and reviews, philosophy of care, insurances accepted, and clinical expertise)?	60%	40%
BOOK		
Do they offer online scheduling for providers within the find-a-provider?	40%	60%
Do they offer online scheduling for non-provider services (e.g., urgent care, imaging etc.) in the find-a-provider?	10%	90%
Do they offer online scheduling for virtual visits in the find-a-provider?	35%	65%

Source: Kyruus assessment of the top 20 *US News and World Report* ranked hospitals.