

2017 Patient Access Journey Report

What a Survey of 1,000 Patients Reveals About
How Healthcare Consumerism is Changing the
Patient Journey to Find Providers



INTRODUCTION

Across all industries, consumer experience has changed drastically in recent years. Services once relegated to brick and mortars—grocery shopping, for instance—are now a few clicks away. But today’s consumers aren’t just going online to order groceries—they’re subscribing to services that deliver organic, pre-packaged meals straight to their doors, meeting consumers’ unique dietary preferences while offering unsurpassed convenience.

Modern digital interactions and self-service capabilities across various industries are driving consumers to expect similar online experiences in healthcare. Further contributing to this shift in healthcare consumerism is the increased cost burden on individuals. With rising premiums and higher deductibles, **consumers are yearning for right-on-time information to help them make informed decisions about the organizations and providers they entrust with their care.** Health systems that understand how today’s consumers search for healthcare options and what they prioritize will be better positioned to engage them effectively and retain them over time.

To better understand consumer behavior around accessing healthcare, we conducted a survey of 1,000 consumers ages 18-65+ in July 2017 through Wakefield Research. All respondents searched for a healthcare provider for themselves in the last two years and provided insights about how they:



Search for providers



Select providers



Schedule appointments

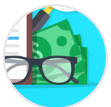
KEY FINDINGS



Most consumers found a doctor in the last two years through their own research, with more than half going online specifically to find information about providers. While insurance websites are a common resource, most online consumers consult a search engine during their research (59%).



Referral from another healthcare provider is the preferred method for finding a PCP or specialist (38%). However, nearly all consumers always or sometimes perform due diligence before booking an appointment with the referred provider (90%).



Cost is top-of-mind for all consumers and “insurance accepted” emerged as the most important factor when selecting a healthcare provider (75% deemed it as extremely important). Clinical expertise is a close second, with 53% ranking it as extremely important.



Despite researching online, most respondents still prefer booking appointments over the phone (62%). Millennials are likely to change this trend with 40% stating a preference to book online. This signals a need for health systems to address patient access across all channels.



Health system brand matters. Consumers placed the health system’s reputation among the top four most important criteria when selecting a provider and three out of four consumers said that affiliation with a hospital or health system is extremely or very important.



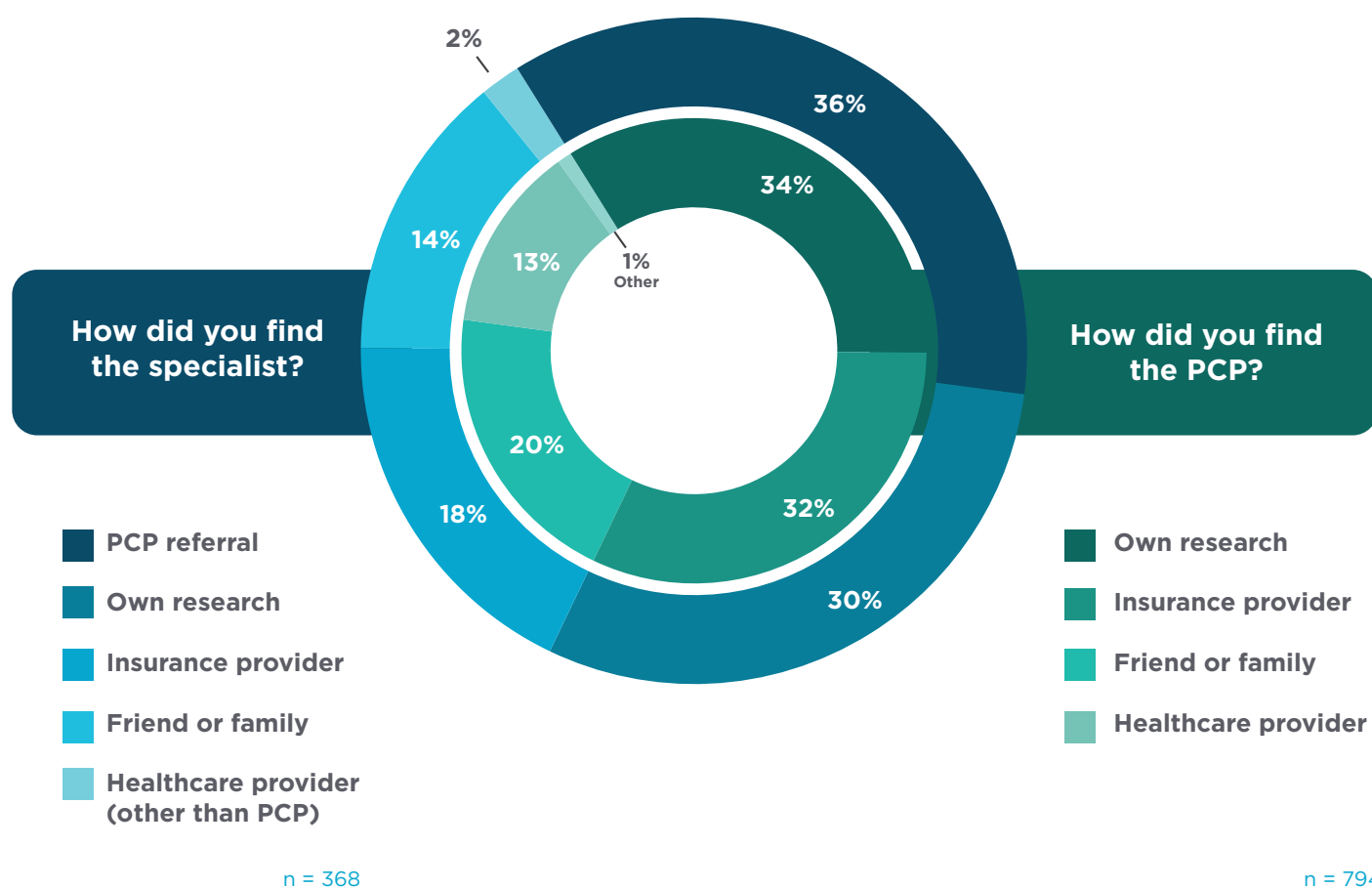
CONSUMERS TAKE AN ACTIVE ROLE IN FINDING PROVIDERS

Preference for access channels (e.g., online, phone) to find providers varies among consumers, signaling a need for health systems to address patient access at entry points across the enterprise. However, regardless of the access method, one theme remains consistent: most consumers perform due diligence on potential providers.

Healthcare Referrals & Independent Research Are Top Methods for Finding Providers

Historically, consumers have relied heavily on referrals and word of mouth to find providers. However, while referrals are still a reliable channel for consumers, results from this study show that consumers are spending more time online performing self-driven research. Whether searching for a primary care provider (PCP) or specialist, **38% of all consumers reported finding their provider on their own**. While the majority of consumers who sought specialty care reported finding the specialist through their PCP, independent research was the second most common method.

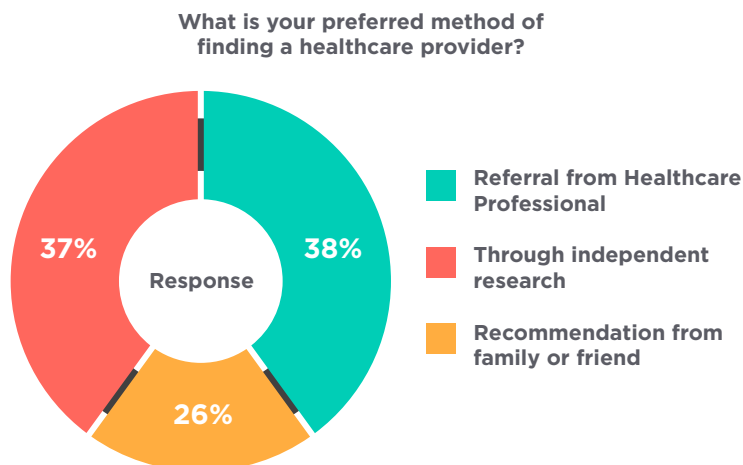
Figure 1. How Consumers Find PCPs and Specialists





Regardless of whether they searched for a specialist or PCP, receiving a referral is also the *preferred* method for today's consumers overall. When asked to state a preference, the largest share said receiving a referral from a healthcare professional (38%). However, **even when they receive a referral, 90% of all respondents always or sometimes conduct additional research on providers**, showing that today's empowered consumers place a strong emphasis on independent validation.

Figure 2. Healthcare Consumers' Preferred Methods for Finding a Provider

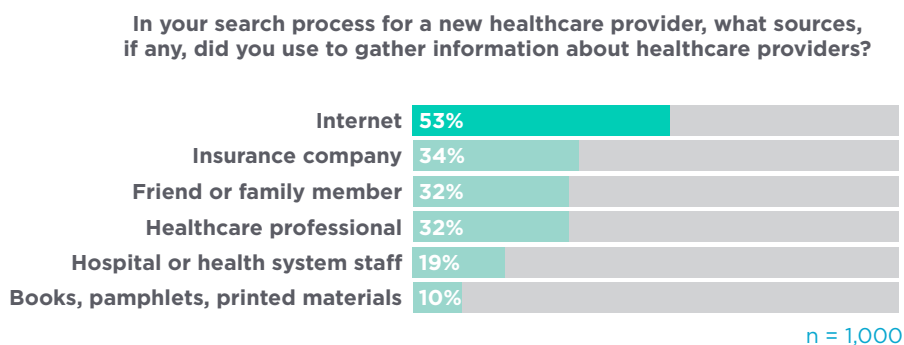


Consumers' preferred methods for finding a provider changes when responses are segmented by age. Millennials (ages 18-36) and Gen Xers (ages 37-52) are more self-reliant than baby boomers (ages 53-71), with the majority in both age groups favoring independent research (41% and 38%, respectively). In contrast, less than 1/3 of baby boomers said they prefer independent research, while 45% surveyed prefer referrals.

Search Engines & Insurance Websites are Top Online Resources for Provider Research

What is the most common resource for consumers performing due diligence on healthcare providers? Whether searching for a provider on their own, or researching a referral, over half reported consulting the internet for provider information. This trend signals a growing need for health systems to offer the tools necessary for consumers to take an active role in their healthcare decisions and get their information straight from the source — health systems and providers.

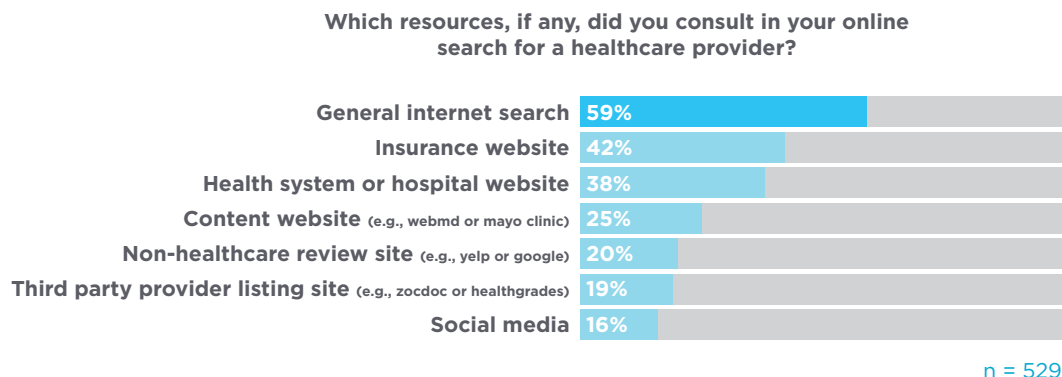
Figure 3. Top Sources for Gathering Provider Information





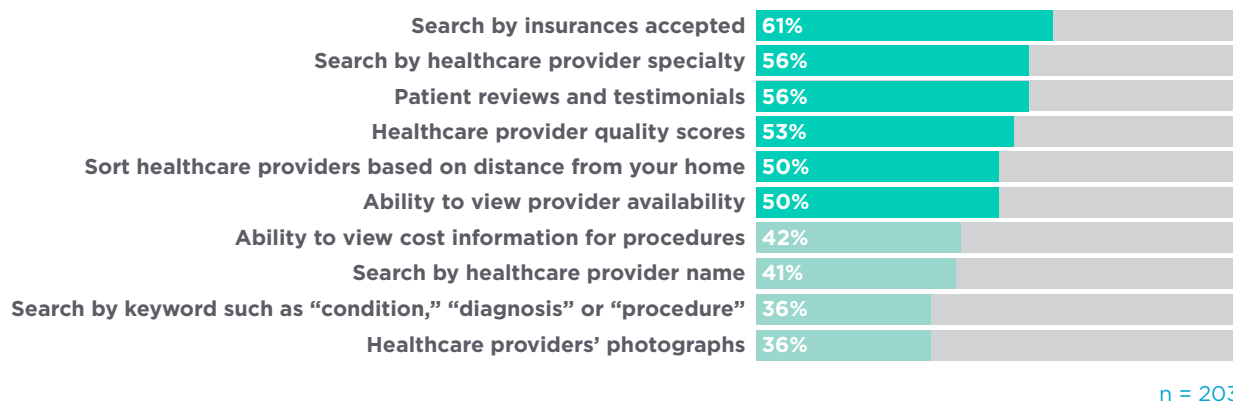
Of those consumers who conduct research online, **4 out of 5 performed a general internet search to find provider information**. This puts the onus on health systems to engage online consumers who are searching for care but don't have a specific provider in mind. To do this, they must invest in their digital brand and web strategies to create compelling digital experiences for healthcare consumers and cultivate the sustainable, competitive advantage that is critical for both attracting and retaining web-savvy patients.

Figure 4. Top Online Resources for Provider Research



As shown above, when researching providers, consumers rely on insurance websites over health system websites, which is not surprising given the significance consumers place on insurance requirements. Health systems can provide more visibility in this area by offering accurate, up-to-date insurance information within their find-a-provider sites, as 61% of respondents identified “Search by insurances accepted” as the most desired resource on a health system website for identifying potential providers.

Figure 5. Top 10 Online Resources Consumers Desire on Health System/Hospital Websites



Addressing patient access is one component of a broader healthcare consumer engagement strategy. While appointment wait times, billing processes, optimal care, and customer service also play pivotal roles in the consumer experience, patient access sets the tone for the complete patient experience with a health system. Leading organizations are addressing patient experience at the front door—whether online, on the phone, or through a provider—to ensure a smooth introduction between consumers and the health system.



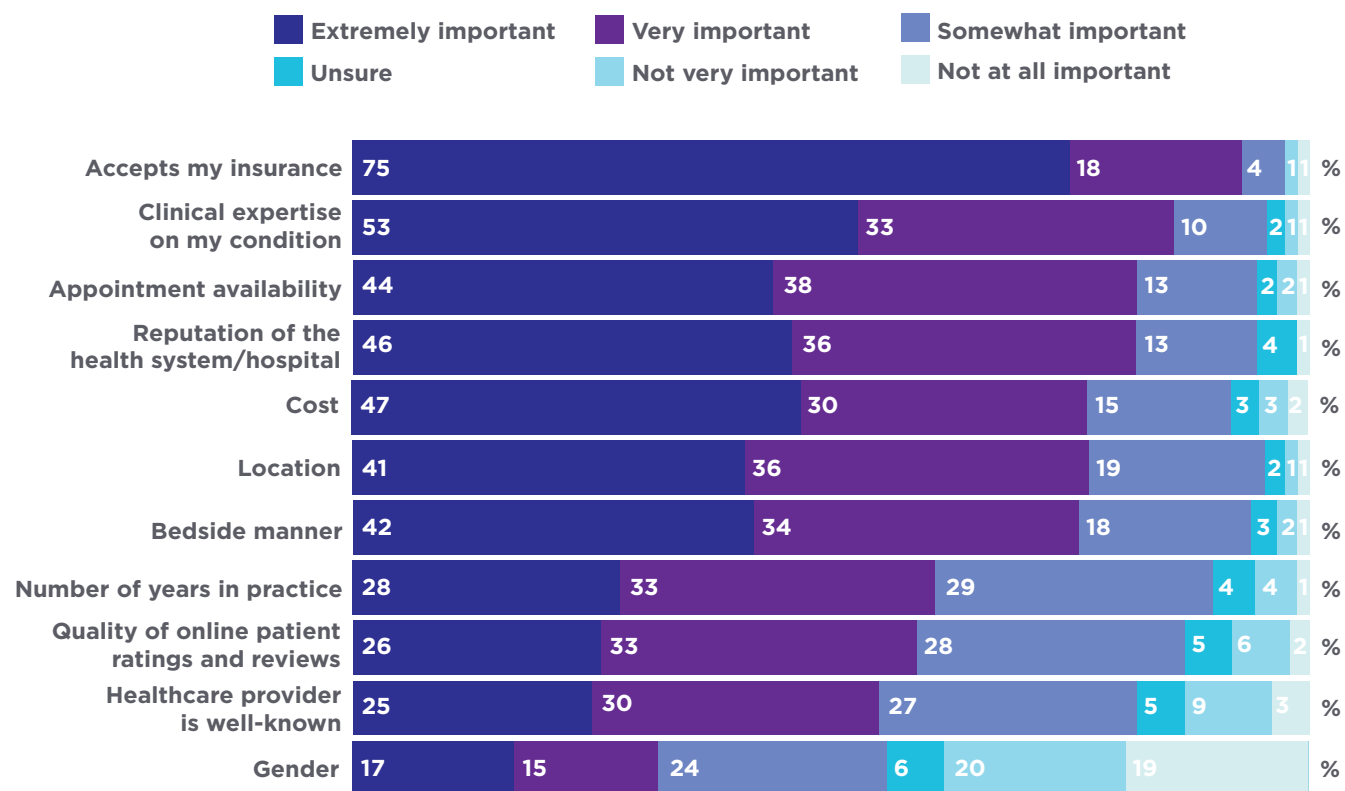
CONSUMERS WANT TO WEIGH OPTIONS WHEN SELECTING A PROVIDER

As healthcare moves towards an emphasis on value over volume, consumers are shifting their behavior to get the most value for their spending. From insurance to provider marketplaces, consumers are comparison-shopping healthcare options. Health systems must consider their business-to-consumer model to attract these “shoppers” during their decision-making phase.

Insurances Accepted & Clinical Expertise are Most Important Provider Criteria

With so many consumers finding their own providers and researching options online, health systems can get ahead of the competition by showcasing the information consumers find most important within their find-a-provider sites. As consumers progress in their patient access journey from searching to selecting, “Insurance accepted” continues to be a critical factor, with three out of four identifying it as the most important factor in provider selection. Clinical expertise is a close second, with 86% ranking it extremely or very important. Other key criteria include reputation of the hospital or health system (82%); appointment availability (82%); cost (77%); and location (77%).

Figure 6. Most Important Criteria for Consumers Selecting a Provider



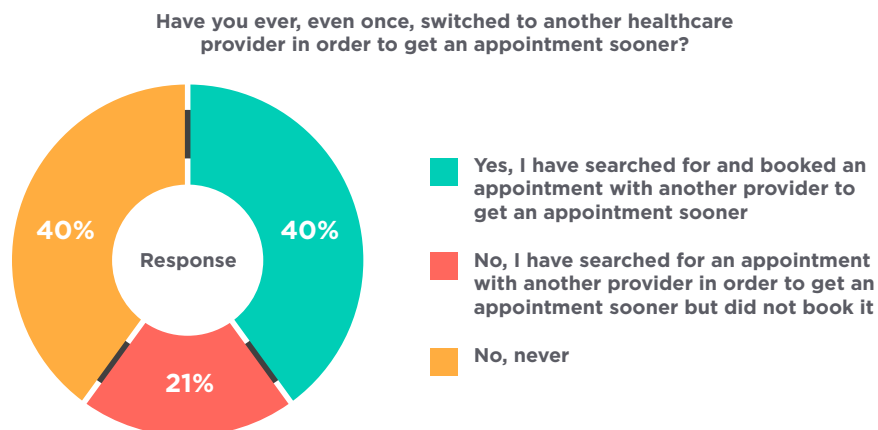
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Convenience is a Growing Priority for Consumers

Another critical factor in the decision-making process is appointment availability: 4/5 of respondents said it is extremely or very important. In fact, the research shows that **nearly 2/3 of consumers have continued their provider search to get an appointment sooner** (61%). This shows that the “right” care can mean something different to each consumer.



Figure 7. Whether Healthcare Consumers Have Switched Providers to Get an Appointment Sooner

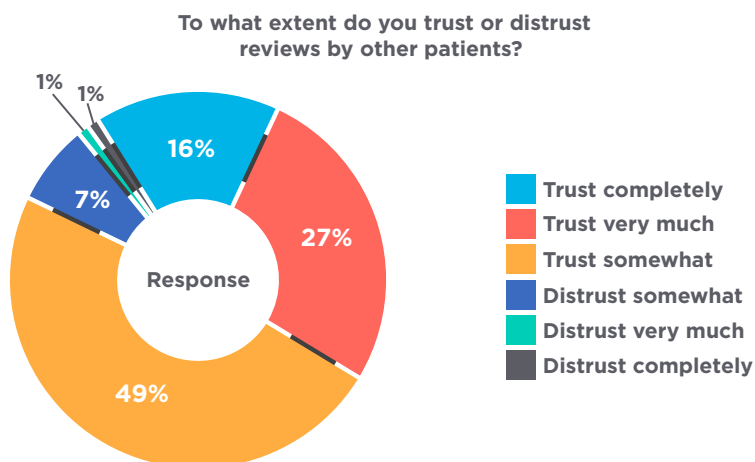


n = 1,000

Provider availability is uniformly important across generations—roughly 4/5 of all millennials, Gen Xers and baby boomers indicated it is extremely or very important. However, **millennials and Gen Xers are far more likely to continue their provider search to find another provider who can see them seen sooner**: 79% and 67%, respectively, indicated they had done this. Meanwhile, less than half of baby boomers surveyed said they have continued their provider search to obtain an earlier appointment. As convenience becomes a growing priority for consumers, health systems can separate themselves from the pack by readily providing the information that empowered consumers are seeking.

For example, the survey showed that consumers typically trust patient ratings and reviews, seeing them as another important data point when selecting a provider. Nearly half of respondents stated they trust them completely or very much.

Figure 8. Healthcare Consumers' Trust in Patient Reviews



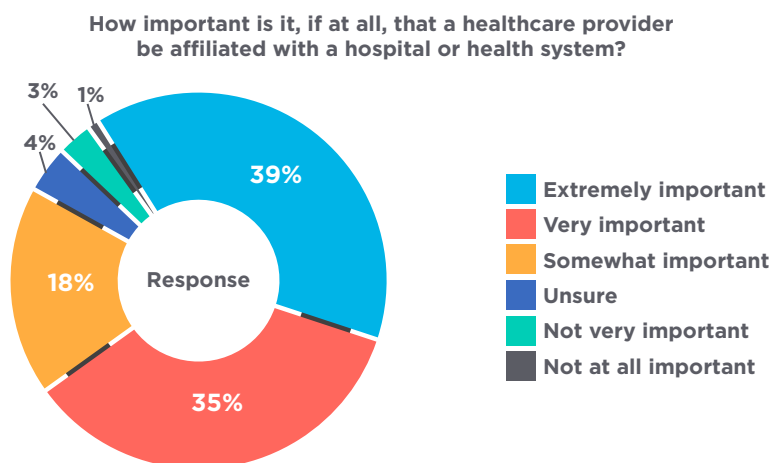
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Millennials are far more trusting of patient ratings and reviews than baby boomers, as 28% reported that they trust them completely (versus 7%). By providing these on their own provider profiles, health systems can reduce the risk that patients will leave the site to find that type of provider information elsewhere.

Hospital/Health System Brand is a Key Consideration for Consumers

When selecting a provider, **consumers place a high priority on the reputation of the hospital or health system**; 4/5 ranked it as extremely or very important. In fact, when asked specifically whether it was important for a provider to be affiliated with a hospital or healthcare system, nearly 3/4 said it was extremely or very important.

Figure 9. Importance of Provider Affiliation with a Hospital or Health System



To engage consumers effectively online and become that go-to resource that consumers seek out in the future, it's critical for health systems to offer an informative, engaging experience to consumers on their websites. Of note: of those online researchers who stated that a health system website did not meet their expectations, 55% said it was because the provider search was not helpful and/or information about healthcare providers was sparse.

With competition to attract consumers online rising, health systems must invest in their own digital health capabilities to break away from the competition and stay top of mind when the need for care arises. One way to do this is to empower consumers to navigate complex decisions by arming them with rich information and self-service capabilities that allow them to compare options. By focusing on the consumer's decision-making process, health systems can garner trust with savvy healthcare consumers who are interested in weighing their own priorities to find the right provider at the right time.

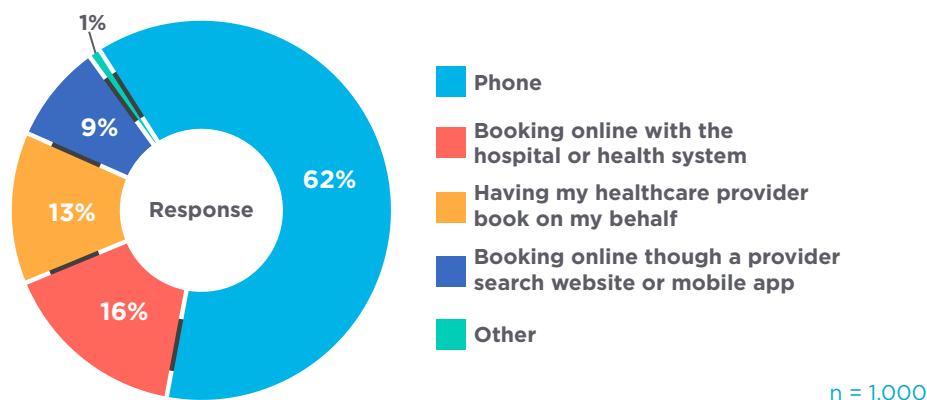
APPOINTMENT SCHEDULING PREFERENCES VARY AMONG AGE GROUPS

While most consumers are not yet booking appointments online as readily as they book travel, all trends point to the internet playing a critical—and permanent—role in how consumers access healthcare information moving forward, especially for Millennials. Health systems must innovate to deliver on consumer expectations today and establish long-term relationships to retain them tomorrow.

Preferred Method for Scheduling Appointments Differs from Resources Used for Research

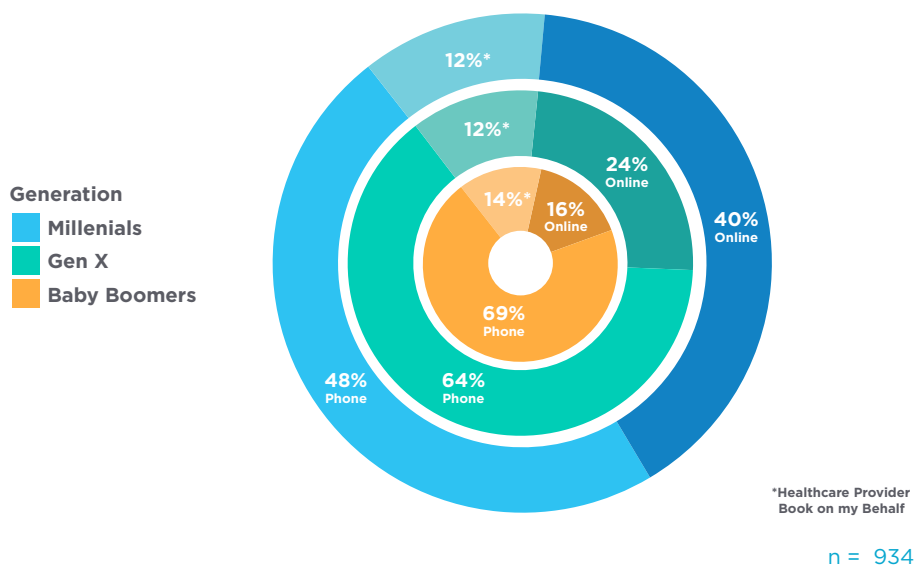
Even though most consumers search online to research provider information, nearly 2/3 still prefer to call to book appointments (62%). Their reasoning? It's quicker (53%) and nearly half see it as the easiest option (45%).

Figure 10. Healthcare Consumers' Preferred Means of Booking Appointments



While only 25% of 1,000 respondents preferred booking online (directly through the hospital or health system website, or through a third party application or website), 40% of millennials prefer this method. For consumers who prefer booking online, most stated convenience as the most important reason (69%).

Figure 11. Preferred Means of Booking an Appointment by Age Group

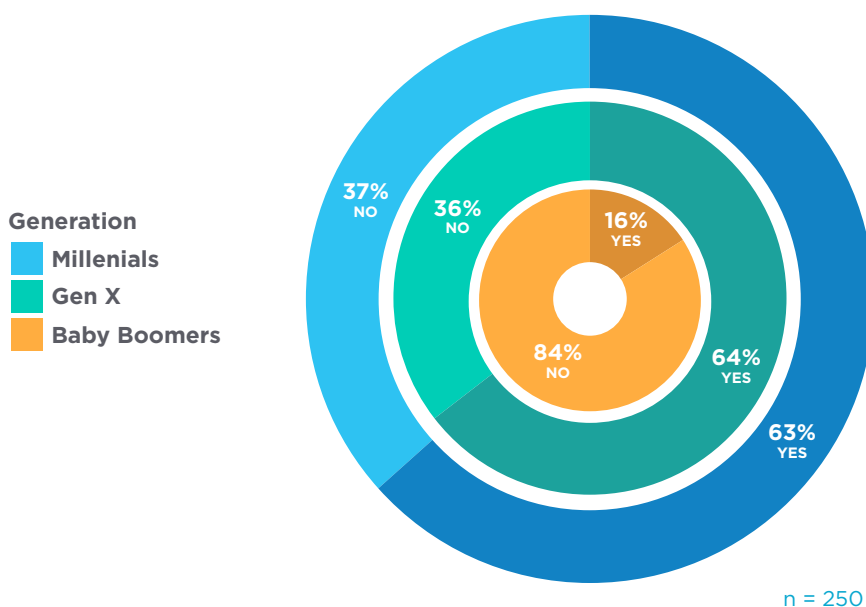




Self-Service Appointment Scheduling a Growing Desire for Millennials and Gen Xers

Self-service capabilities and convenience are becoming increasingly important to healthcare consumers. **In fact, 50% of respondents who prefer to book online said they would switch providers for the ability to do so.** This trend is even more apparent when segmented by age group: 63% of Millennials and 64% of Gen Xers who prefer to book online indicated they would switch providers for this convenience.

Figure 12. Whether Consumers are Willing to Switch Providers for the Ability to Book Online



Millennials and Gen Xers may not be the primary healthcare consumers today, but as these groups age and begin taking closer care of their parents and relatives, they'll be expecting the high level of interactivity they experience in other industries. As a result, appointment booking preferences will continue to shift in coming years and health systems will need sound digital strategies to engage them effectively, while remaining cognizant of the fact that a share of healthcare consumers will likely always prefer to call for appointments.

CONCLUSION: HEALTH SYSTEMS MUST ENHANCE THEIR DIGITAL FRONT DOORS—AS PART OF A BROADER PATIENT ACCESS STRATEGY

Healthcare consumer preferences for the methods of finding, selecting, and scheduling appointments with providers varies across age groups. As millennials and Gen Xers become bigger healthcare consumers, the rising demand for digital health capabilities will make health systems more vulnerable to patients switching to competitors. When consumers access sparse or inaccurate provider information, it inhibits them from finding a provider who meets their various needs—and requires them to continue looking, potentially at other health systems instead. Health systems can look to online offerings in other industries, such as ratings and reviews, to support healthcare consumers' decision-making processes. First and foremost, health systems must offer insightful information during the provider search and selection phases.

To further respond to the evolving expectations and preferences of today's healthcare consumers, health systems must develop strategies to enhance access across channels, such as by improving service through their call centers, expanding the richness of provider information accessible on their websites, and improving processes around provider-to-provider referrals. By responding to and staying ahead of the evolving needs of the healthcare consumers who seek their services, health systems can better position themselves to both attract new patients and fortify their relationships with existing ones.

ABOUT KYRUUS

Kyruus delivers proven provider search and scheduling solutions that help hospitals and health systems match patients with the providers best suited to care for them. The ProviderMatch suite of solutions—for consumers, access centers, and referral networks—enables a consistent patient experience across multiple points of access, while aligning provider supply with patient demand. The company's proprietary provider data management platform forms the foundation of its solutions, powering them with accurate data by coupling data processing with administrative applications.

To find out why a Better Match Means Better Care®, visit www.kyruus.com.