2018 Patient Access Journey Report

Key Findings from Kyruus' Annual Survey of 1,000 Consumers and Their Journey to Finding the Right Provider
INTRODUCTION: KEEPING PACE WITH CONSUMERISM BY ENHANCING PATIENT ACCESS

Within a relatively short number of years, patient experience has become a top priority for many healthcare organizations as consumerism continues to grow in healthcare. However, with so many players involved in delivering patient care, health systems are at a disadvantage relative to organizations in other industries when it comes to delivering a seamless customer journey. Part of the challenge is addressing the varied ways patients access care: from looking online to calling in, to visiting clinics and hospitals, and receiving both in- and out-of-network referrals. Health systems need a firm understanding of each access channel in order to connect these disparate “front doors”.

In 2017, Kyruus published a study on healthcare consumers across age groups and demographics to better understand how they search for, select, and book appointments with providers. One year later, we expanded our analysis of key access points to take a deeper look at online behavior and the patient experience in call centers, as well as address the growing demand for retail and urgent care clinics. Our latest findings show that there are still opportunities for health systems to create a cohesive patient access experience and take advantage of their unique capacity to do so to drive patient acquisition and retention.

DETAILS ABOUT THIS STUDY

This report is based on a survey of 1,000 consumers conducted by Wakefield Research on behalf of Kyruus in July 2018. All survey respondents searched for a provider for themselves in the last two years and represent an equal mix of private insurance and Medicare or Medicaid respondents from four age groups:

- 18-34
- 35-49
- 50-64
- 65+

Similar to the 2017 Patient Access Journey Report, our findings look at key generational segments:

- Millennials (ages 18-36)
- Gen X (ages 37-52)
- Baby Boomers (ages 53-71)
KEY FINDINGS:

Convenience remains a top priority. Consumers are “shopping” for healthcare more than ever. Health systems must consider their varied paths in order to meet their unique needs; callers with complex clinical needs require a different engagement strategy from online consumers browsing healthcare options.
- Nearly ⅓ of all consumers in the study found a new provider on their own, with almost half of self-service consumers finding their provider online.
- Almost half of respondents visited an urgent care or retail clinic in the last 12 months. The top reason? 42% stated it was due to a convenient location.

Care quality is a deciding factor. As consumers become more active in their healthcare decisions, value for their dollar is a key consideration, but today’s consumers don’t want to sacrifice quality in the process. Health systems can establish trust by presenting rich, accurate information about care options in an accessible way.
- 32% of consumers report quality of patient online patient ratings and reviews as extremely important, up from 26% in 2017.
- The share of consumers who rated cost as extremely or very important decreased by 10 percentage points from 2017.

Cohesiveness is lacking in patient access. Healthcare organizations are still struggling to create a seamless patient experience that converts initial interest to booked appointments within the network. Connecting the touch points in the consumer journey not only increases conversion, but also builds a foundation for long-lasting relationships with patients.
- While most consumers searched online for a provider, nearly ⅔ prefer to call for an appointment. However, less than half of those who called a health system to book an appointment were able to do so on the first call.
- 30% of consumers who visited a retail or urgent care clinic indicated they did so because their primary care provider was unable to see them, signaling clear barriers to access.
CONVENIENCE IS A TOP PRIORITY FOR TODAY’S CONSUMERS

While access preferences vary across age groups, one theme remains constant: there is high demand for convenient care options.

Finding #1: Healthcare Consumers Want Self-Service Options for Obtaining Care

The 2018 survey results show that demand for self-service options continues to be a priority for today’s consumers. This is first evident in how consumers search for care. Similar to last year, ⅓ of all respondents searching for a PCP reported finding their provider on their own.

Figure 1. How Consumers Find PCPs and Specialists

Across age groups, the primary source for independent researchers finding a provider is not surprising: 47% ultimately found their provider online. General internet search maintains the top ranking for online resources, increasing its lead by five percentage points from 2017.

Figure 2. Top Online Sources for Gathering Provider Information
However, many health systems are failing to convert this online demand at the point of engagement. Even though most consumers search online for providers, the majority still prefer to call to book appointments (58%). Their reasoning? It’s quicker (55%) and nearly half see it as the easiest option. A likely factor in this divergence in preferences from digital for research purposes to phone for booking is a lack of access to online scheduling. Kaufman Hall reports that less than one third of leading health systems currently offer open self-service scheduling (i.e., not behind a patient portal).¹

**Figure 3. Healthcare Consumers’ Preferred Means of Booking an Appointment**

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

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>58%</td>
</tr>
<tr>
<td>Booking online directly with health system</td>
<td>15%</td>
</tr>
<tr>
<td>Having my healthcare provider book on my behalf</td>
<td>14%</td>
</tr>
<tr>
<td>Booking online through a provider search website</td>
<td>12%</td>
</tr>
</tbody>
</table>

n=1,000

Similar to 2017, the preference for online scheduling rises sharply for millennials and Gen Xers, as evidenced below:

**Figure 4. Preferred Means of Booking an Appointment by Age Group**

In fact, when asked whether they are willing to switch providers for the ability to book online, 58% of online millennials and 64% of Gen Xers responded “yes,” compared to only 18% of baby boomers. Regardless of their generation, these online consumers are more likely to be commercially insured. In fact, commercially-insured consumers were 1.4 times more likely to have found their provider online compared to Medicare/Medicaid consumers (51% and 38%, respectively). Health systems also have an opportunity to engage commercially-insured patients through online scheduling: ½ prefer online booking, as opposed to 17% of Medicare/Medicaid patients.
As health systems look to grow their patient volumes and support patients across insurance types and age groups, online search and scheduling solutions prove to be of growing interest to consumers. In particular, as millennials become larger consumers of healthcare (Pew Research reports that 1.5 million millennials are becoming mothers each year\textsuperscript{2}), and Gen Xers continue to make healthcare decisions on behalf of their aging parents, health systems stand to lose on establishing relationships with these consumers seeking self-service access if they do not build out such offerings.

**Finding #2: Provider Availability and Location Top Criteria When Searching for Providers**

Not surprisingly, appointment availability—both appointment wait times and flexible hours—and practice location are key for consumers searching for care. Availability, in particular, is uniformly important across generations: roughly ⅘ of all millennials, Gen Xers and baby boomers rated it extremely or very important.

However, when asked whether they have ever continued their provider search in order to find a sooner appointment, millennial and Gen X respondents are far more likely to keep looking: 81% and 71%, respectively, indicated they had done this before. Meanwhile, less than half of baby boomers reported having continued their search for an earlier opening.

**Figure 5. Whether Consumers Have Switched Providers to Get an Appointment Sooner**

<table>
<thead>
<tr>
<th></th>
<th>Millennials</th>
<th>Gen Xers</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, I have searched for and booked an appt. with another provider in order to get an appt. sooner.</td>
<td>59%</td>
<td>47%</td>
<td>55%</td>
</tr>
<tr>
<td>No, I have searched for an appt. with another provider in order to get an appt. sooner but did not book it.</td>
<td>22%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>No, never</td>
<td>20%</td>
<td>30%</td>
<td>21%</td>
</tr>
</tbody>
</table>

n=1,000
The significance consumers place on location has remained consistent over the last 12 months: 76% of consumers indicated it was extremely or very important in 2018, compared to 77% in 2017. The 2018 survey yielded new insights into how much of a role location plays in accessing care too. With so many consumers finding their provider online, this year’s survey aimed to better understand how they approach their search and found that the most common interaction with Google is to search for a type of provider “near me”.

**Figure 6. How Online Consumers Use Google to Search for Providers**

<table>
<thead>
<tr>
<th>Approach to Google</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for a doctor “near me” or “near town/city”</td>
<td>66%</td>
</tr>
<tr>
<td>Use a provider’s profile pane (directly within Google results)</td>
<td>40%</td>
</tr>
<tr>
<td>Click a link in the results to a health system or hospital website</td>
<td>39%</td>
</tr>
<tr>
<td>Click a link in the results to a provider listing site (e.g., Zocdoc, Healthgrades)</td>
<td>30%</td>
</tr>
<tr>
<td>Use Google Maps (or similar mobile app.) application</td>
<td>19%</td>
</tr>
<tr>
<td>Leverage Google Maps within the browser</td>
<td>14%</td>
</tr>
</tbody>
</table>

Another indicator of the importance of location to patient access is the share of consumers who have visited a retail or urgent care clinic. Of the 48% of respondents who visited a clinic in the last 12 months, most indicated it was due to the convenient location.

**Figure 7. Top Reasons Consumers Visit Clinics**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenient location</td>
<td>42%</td>
</tr>
<tr>
<td>Speed of access for being seen</td>
<td>37%</td>
</tr>
<tr>
<td>Convenient hours</td>
<td>33%</td>
</tr>
<tr>
<td>I didn’t need to book an appointment</td>
<td>30%</td>
</tr>
<tr>
<td>I have a primary care physician, but they were unable to see me</td>
<td>30%</td>
</tr>
<tr>
<td>Relative cost of services</td>
<td>21%</td>
</tr>
<tr>
<td>I don’t have a primary care physician</td>
<td>8%</td>
</tr>
</tbody>
</table>

This emphasis on convenient access shows that today’s consumers want healthcare options that fit into their lives and they are willing to switch providers to meet their logistical needs. However, the research is clear on priorities: quality of care is most important.
CARE QUALITY IS A DECIDING FACTOR FOR CONSUMERS

While convenience is a driving force behind healthcare consumerism, consumers don’t want to sacrifice quality of care to get it. Health systems are uniquely positioned to deliver both, but they need to provide the tools and care site options for consumers to weigh their options.

Finding #3: Consumers Placing a Higher Significance on Quality in 2018

Not surprisingly, clinical expertise is the most important factor when selecting a provider, second only to whether the provider accepts the consumer’s insurance plan. 87% of respondents rated clinical expertise as extremely or very important, the same result as in 2017.

![Figure 8. Most Important Criteria for Consumers Selecting a Provider](image)

While other criteria, such as appointment availability and health system reputation, ranked similarly to 2017, the significance consumers place on cost declined by 10 percentage points in terms of the share of consumers who consider it extremely or very important. Meanwhile, quality of patient ratings and reviews increased in importance: 32% consider it extremely important, up six percentage points from 2017. These two changes in provider attribute preferences signal that today’s healthcare consumers are willing to pay more for quality.

So how do consumers assess a provider's clinical expertise? Most respondents selected “highly referred by a physician” as an important factor when evaluating clinical expertise, reinforcing that consumers place a high degree of trust in recommendations from other providers.
While provider referrals play a key role in patient decisions, a recent study indicates that half of physicians who refer out of network say it is because they find it difficult to view the providers in their network,³ which places patient retention at risk. Thus, in order to both acquire new patients and retain existing ones effectively, health systems need to empower both providers and consumers with rich, accurate information about providers in the network.

When it comes to consumers conducting independent research, with clinical expertise being the deciding factor for many healthcare consumers, health systems can break away from the pack online by showcasing providers’ unique clinical expertise on their websites in a way that is easily searchable.

Finding #4: Interest in Quality Assessment Tools Growing

While the highest share of consumers seeking a PCP found a provider through independent research (34%), when asked about their preferred method, many stated “a referral from a healthcare professional” (37%). In addition, this is top source for consumers seeing specialists. However, millennials, Gen Xers, and baby boomers alike continue to perform due diligence. In fact, 91% of all respondents always or sometimes conduct additional research after receiving a referral from a healthcare provider.

To assist with validation of provider referrals, today’s informed consumers are yearning for methods to assess care quality online. When asked which features they would most like to see on a health system or hospital website, interest in provider quality scores increased five percentage points from 2017, now ranking in the top three most important features.

By focusing on the consumer’s decision-making process and delivering rich insight into care quality, health systems can garner confidence and trust with savvy healthcare consumers. Not only will offering these tools attract online consumers searching for care, but health systems can also boost patient retention when established patients seek to validate provider referrals.
This research indicates that converting patient demand to booked appointments is often a barrier to access across channels, reflecting a lack of cohesive experiences in patient access.

Finding #5: Scheduling Barriers Hinder the Patient Experience

With so many consumers searching online for provider information (52%), but few currently preferring to book online (27%), there is both an opportunity for health systems to convert that demand better at the point of engagement and to drive more cohesion across key access points. Even when today’s consumers call their health system, few are able to complete the scheduling process on the first call: when asked about the last time they called a health system or hospital to book an appointment, less than half of consumers left the call with an appointment booked.

Compounding this gap in the patient access experiences is the fact that consumers often encounter discrepancies with the information about care options online versus when they call in. With consumers touching multiple entry points before arranging care, health systems need to address and unify access points to create a more cohesive patient experience.

Figure 11. Call Outcomes For Consumers Looking for an Appointment

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

- [44%] I booked an appt. on the first call
- [39%] I had a positive experience overall
- [29%] I was confident I received an appt. with a provider who would meet my clinical needs
- [17%] I received helpful information to inform my care options
- [12%] I was put on hold for a long period of time
- [11%] I was transferred to another location to book an appt.
- [9%] I was given a name / number to book an appt. myself
- [8%] I was looking for an appt., but did not end the call with one

n=1,000
Meanwhile, as demand for convenient access rises, the research shows that many consumers visiting retail or urgent care clinics did so because of lack of availability within traditional care settings. 30% of respondents who visited a clinic indicated they did so because they have a PCP who was unable to see them. Health systems today are partnering more and more with retail clinics to help boost access and counter long appointment wait times. But for those without a retail presence, unmet demand for it may cause patients to seek care elsewhere—potentially outside of the network.

Finding #6: Consumers Are Looking for Branded Experiences
As care site options multiply, the fact that healthcare consumers are looking for a branded experience puts health systems at an advantage. In fact, most respondents stated that affiliation with a hospital or health system is extremely or very important (68%). What’s more, when asked to compare varied provider criteria, the reputation of the hospital or health system ranked as the third most important criteria when selecting a provider. This trend is similar to other industries where healthcare consumers are interested in establishing a trusted relationship with premium brands.

**Figure 12. Top Six Criteria When Selecting a Provider**

Combined with rising interest in quality scores, health systems have an opportunity to capitalize on their brand equity, increase their digital brand presence, and differentiate their care services online and in their communities to attract consumers.
TAKE-AWAY: HEALTH SYSTEMS HAVE AN OPPORTUNITY TO MODERNIZE PATIENT ACCESS WHILE DRIVING SYSTEMNESS

Before health systems can delight their customers, they need to address the fractured provider search and scheduling experiences many consumers experience when trying to access care. With convenience a growing need for today’s healthcare consumers, health systems must also offer timely, self-service booking options for a growing digital population in order to acquire and retain patients effectively. Due to lack of visibility into their provider networks, many health systems struggle to provide consumers options for weighing convenience, such as proximity to work or home, and clinical quality. Compounding these access challenges are gaps in scheduling workflows, contributing to long appointment wait times and lost conversion opportunities that can cause patients to seek care elsewhere.

Ultimately, by providing insight across the enterprise into available care options, clinical expertise across the network, and provider schedule capacity, health systems can drive “systemness”: an enterprise-wide approach to providing care that offers greater value than the sum of its parts. This is the foundation to delivering the cohesive premium branded experience consumers experience in other industries—an experience that will ultimately help organizations differentiate themselves from traditional and emerging competitors. By creating a convenient connected patient access journey, health systems stand to drive systemness and create sustainable relationships with their patients.

Sources

2 Pew Research Center. More than a million Millennials are becoming moms each year. 2018

ABOUT KYRUUS

Kyruus delivers industry-defining provider search and scheduling solutions that help health systems match patients with the right providers across their enterprise-wide access points. Serving 150,000 providers across leading health systems nationwide, the ProviderMatch suite of solutions—for consumers, access centers, and referral networks—enables a modern and consistent patient experience, while optimizing provider utilization. The company’s award-winning provider data management platform powers each of the ProviderMatch solutions and transforms how health systems understand and manage their provider networks.

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