

The Many Digital Doors of Patient Access and Engagement

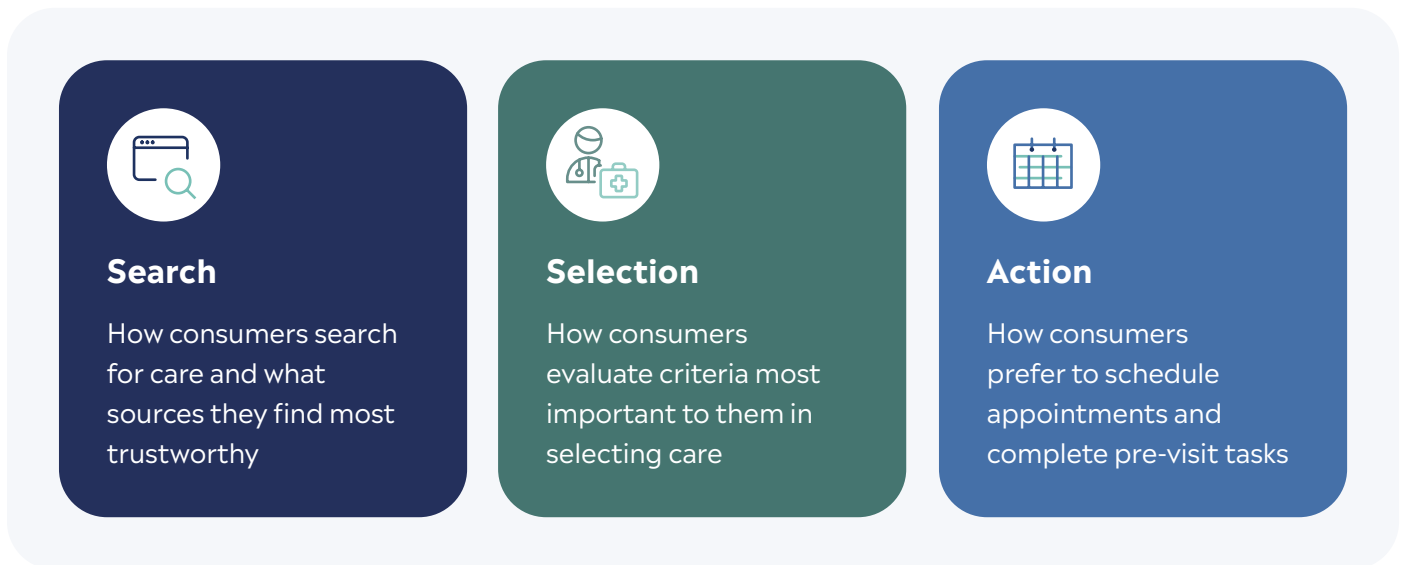
2022 Patient Access Journey Report



Introduction: Advancing the traditional digital front door

Developing a comprehensive “digital front door” strategy has been a top priority for healthcare organizations as they’ve worked to transform the **Find Care** experience for consumers—both online and in traditional channels—and stay ahead of their competitors. As healthcare organizations have expanded their patient access strategies, the digital front door has evolved to embody many “doors” beyond a consumer-facing website, including mobile apps, virtual assistants, third-party websites, and more. The common thread running through these many doors is meeting consumer needs and expectations for convenient access to accurate, consistent information, seamless experiences, and self-service digital tools.

For the sixth consecutive year, Kyruus Health surveyed 1,000 consumers across generations and geographies to understand how their preferences for finding, selecting, and accessing care have evolved. This year’s report provides insights into consumer preferences along three key stages of the patient access journey:



Details about this study

This report is based on a survey of 1,000 consumers conducted by Wakefield Research in August 2022 on behalf of Kyruus Health. All respondents searched for a provider for themselves in the last two years and over 80% had done so within the prior 12 months. Respondents were recruited from across the United States and represented a comparable mix of private insurance and Medicare or Medicaid¹ from four age groups (18-34, 35-49, 50-64, 65+ years).

Similar to the previous five editions (2017-2021) of this report, our findings look at key generational segments with the addition of the Gen Z grouping this year:

- Gen Z (ages 18-25)
- Millennials (ages 25-40)
- Gen Xers (ages 41-56)
- Baby Boomers (ages 57-75)

1. After weighting, approximately half had private insurance, 45% had Medicare or Medicaid, and less than 10% had Military / VA insurance or were uninsured.

Key findings



The internet still retains the top spot for consumer research (61%) when it comes to finding care, and many are broadening their search once online—**nearly 80% of consumers used two or more online resources in their research process.**



Factors related to cost, quality, and convenience remain the top criteria that influence both how consumers select care today as well as their future care decisions.



Cost transparency is pivotal to care selection: 95% of consumers consider some kind of cost information and 68% say they would be more likely to book medical appointments when they have visibility into the expected cost of care.



Consumer preference for online booking remains strong—over 40% favor this option and about a 1/3 cite it as a factor when considering where they will obtain care in the future.



Consumers feel the pain of healthcare staffing shortages—about 1/5 report long hold times when calling to book care, and of those, nearly 1/3 were unsuccessful in their attempt to book care.



Consumers are eager to use digital channels for pre-appointment tasks and to engage with their healthcare providers—93% are extremely or very interested in using digital self-service for pre-appointment tasks and 65% cite text message, email, or mobile app notifications as preferred methods of communication.

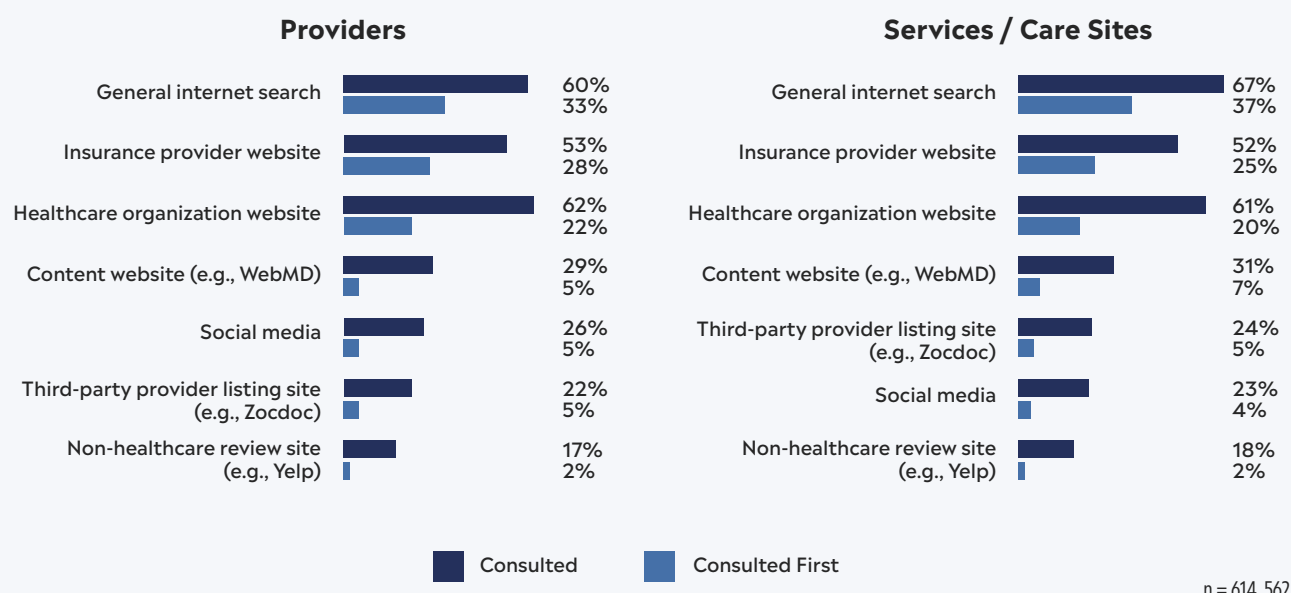
Search: Consumers continue to rely on the internet to find care—and are making multiple stops in their search

With the acceleration of digital self-service as part of the healthcare journey, it’s no surprise that the internet continues to be the premier destination for consumers searching for care—over 60% of consumers use the internet whether looking for a new provider or searching for a service and/or care option (e.g., urgent care, imaging services). When searching for a provider, consumers consistently turn to healthcare organization websites as their top resource to consult (62%), although they most often begin their journey with a general internet search (e.g., via Google). In contrast, when looking for a specific service or care option, consumers rank general internet searches as both the top resource (67%) as well as the first resource (37%) they consult (Figure 1).

While not a top resource consulted, social media is gaining in popularity in the search for providers and services. In fact, 26% of consumers reported using social media to search for a provider compared to 15% in 2021. Not surprisingly, social media is even more popular among younger generations with Millennials having the highest usage (41%) followed by Gen Z (30%), a potential foreshadowing of how younger generations may assess different resources in their future searches for care.

Figure 1. Consumers’ Top Online Resources for Gathering 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?



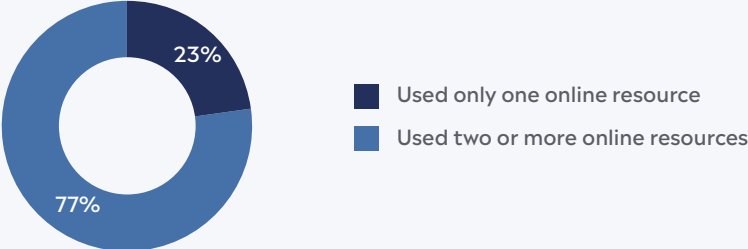


Among those using search engines, search behaviors reflect broader consumer preferences, such as the importance of location in care decisions: 2/3 of consumers leveraged “near me” or “near town/city” terms in their searches and 29% of consumers used map functionality, compared to only 16% in 2021. In addition to location-based searches, consumers also reported searching for specific medical specialties or conditions (48%), specific hospital or health system brand names (44%), and virtual care options (20%).

In the search phase, consumers are seeking information broadly across the internet, most often visiting multiple websites—underscoring why multiple digital front doors are necessary to help engage online consumers throughout their journey. For example, of those who conducted general internet searches (e.g., via Google), 45% also turned to third-party online resources such as health content websites (e.g., WebMD), third-party provider listing sites (e.g., Zocdoc), and non-healthcare review sites (e.g., Yelp) to find providers or services. In fact, nearly 80% of consumers who search for care online are looking at two or more sources of online information as they make their care decisions (Figure 2).

Figure 2. How Many Online Touchpoints Do Consumers Leverage During Discovery?

Which resources, if any, did you consult in your online search for a healthcare provider?



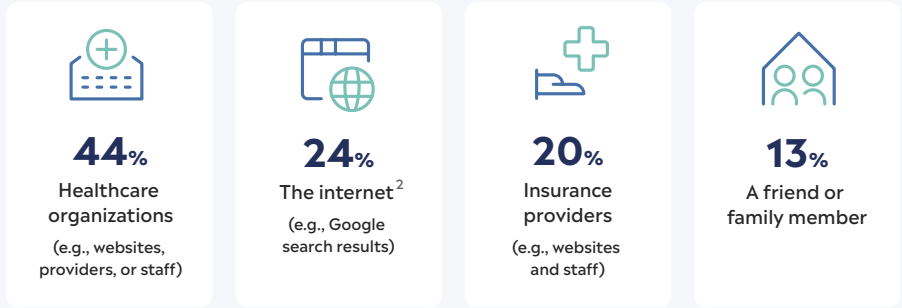
n = 614

As the patient journey becomes increasingly complex, it’s important to understand which resources consumers consider to be the most trustworthy. This topic was a new addition to the 2021 report, wherein consumers cited healthcare delivery organizations, whether online or offline, as the most trusted sources of information. This trend holds true this year as well, with over 40% of consumers saying they trust healthcare organization websites, providers, or staff the most when it comes to looking for new healthcare providers or services (Figure 3).

Additionally, 20% of consumers see health plans, online or offline, as the most trustworthy source, up nine percentage points since 2021—underscoring the growing prominence of this channel as a resource for consumers. Despite the increased usage of social media in the search phase, it does not emerge as one of the most trustworthy sources for gathering provider or service information.

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

- Consumers continue to rely on independent online research and they use multiple resources to find information to help them make care decisions—including leveraging social media and third-party information sites more than in previous years.
- Trust is a critical factor for consumers when seeking information about new healthcare providers or services, and healthcare organizations—inclusive of their providers and staff—remain the most trustworthy source of information.
- Online researchers visit multiple websites in their search process, with most consumers leveraging two or more sources—underscoring the need to meet consumers where they are and provide consistent, accurate information across channels.

2. This includes third-party provider listing sites (e.g., Zocdoc, Healthgrades), content websites (e.g., WebMD), social media, and non-healthcare review sites (e.g., Yelp).



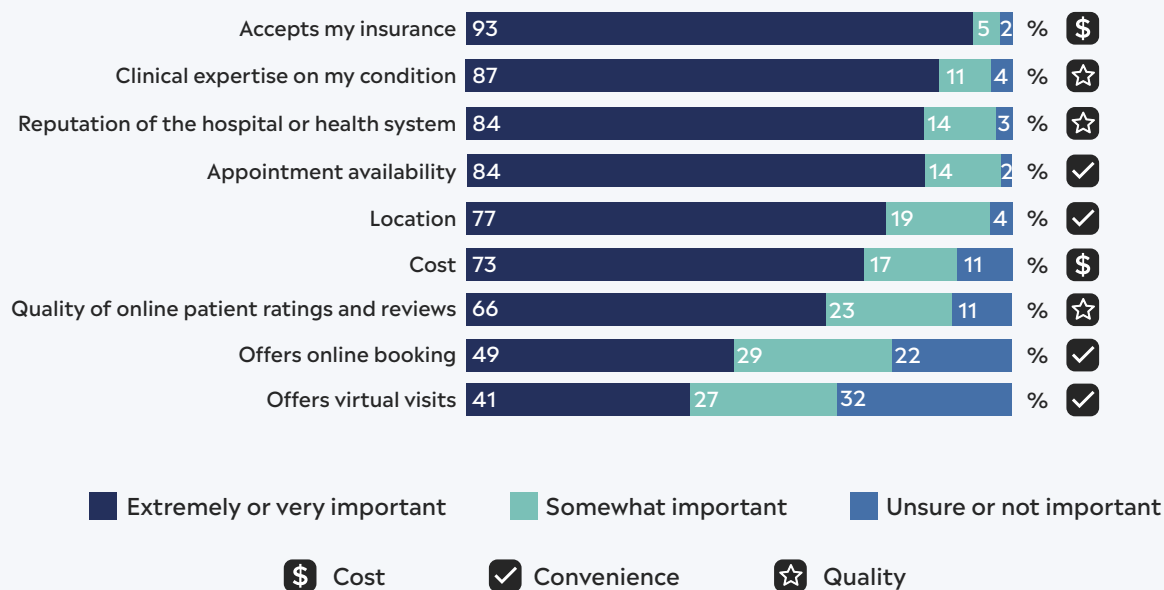
Selection: healthcare consumerism is here to stay—patients as consumers prioritize cost, quality, and convenience of care

As consumers hone in on care decisions, they consistently prioritize criteria related to a few key factors: cost (insurance accepted, 93% and cost, 73%), quality (clinical expertise, 87% and reputation, 84%), and convenience (appointment availability, 84%). This trend in critical decision-making criteria has not shifted significantly since the inception of this report six years ago—illuminating the crucial information that healthcare organizations should continue to publicize across their many digital front doors (Figure 4).

This year’s responses also reveal the growing significance of digital self-service capabilities in care decisions. Half of consumers said the availability of online booking was extremely or very important when selecting a provider—up nearly 10 percentage points over the previous year.

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?



Note: Due to rounding, some percentages may total over 100%.

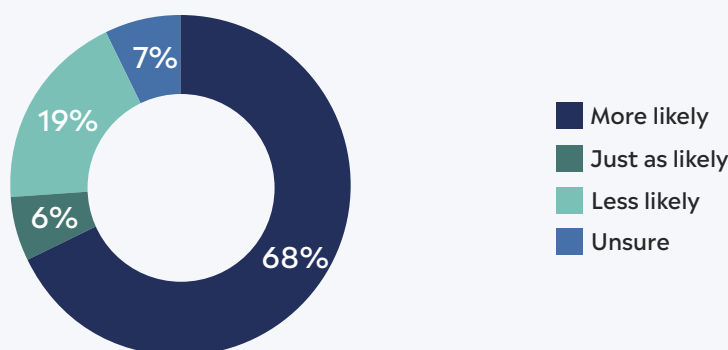
n = 957

In last year’s survey, consumers weighed in on how they compare care options based on transparency into the cost of care, and their responses this year remain constant: over 3/4 consider whether a provider or service is in-network as a means to manage costs, and over half evaluate estimated out-of-pocket costs (based on their specific plan, deductible, etc.). Also consistent with last year’s survey, nearly all consumers (95%) take some sort of cost information into account in their decision-making process. Consumers were most likely to report comparing costs for visits with primary care providers (PCPs) and specialists, followed by testing or lab services, urgent care and retail clinics, and imaging procedures.

Digging deeper into the impact of cost information on care decisions, this year’s survey included a new question to assess whether consumers would be more likely to book an appointment if they had access to cost-related information. What surfaced is that cost is so important that consumers are willing to shop for care to save money—and 2/3 would be more likely to book care where they had visibility into out-of-pocket costs (Figure 5).

Figure 5. Impact of Cost Transparency on Likelihood of Booking an Appointment

Would you be more, less, or just as likely to book a medical appointment where you had visibility into your expected out-of-pocket costs, compared to booking one where you did not?



n = 957

Specific care settings also have an impact on where consumers access care—and convenient care options are a must-have today. In fact, nearly half of consumers cited accessing care at retail clinics such as CVS or Walgreens (46%) or urgent care clinics (49%) in the last year—an increase of nine percentage points for each compared to last year. Access to virtual care options has become the norm following the rise in availability driven by the COVID-19 pandemic. Nearly 30% of consumers reported searching for an on-demand virtual visit in the last two years, signaling continued interest in virtual care as a valuable option that offers the flexibility desired by today’s consumers.

Considering the importance of convenient care options in decision-making, when asked about their preferred method for obtaining acute care³ over 50% of consumers cited convenient care options such as urgent care, retail clinics, and virtual visits as their preferred method, with the balance opting for in-person primary care provider or office visits.

While their care setting preferences may change in the future, consumers’ beliefs about factors impacting where they will seek care remain steady. Over the last three years of this survey, consumers have not strayed from the top three factors that will sway their future decisions on where to seek care: near-term appointment availability (70%), the ability to stay within a specific healthcare organization or network (60%), and transparency into the cost of care (50%) (Figure 6).

Looking across generations, the importance of cost transparency emerges as the number one factor for Gen Z (60%) while access to timely care is even more important for older generations (Gen X, 70% and Baby Boomers, 80%). Younger generations also place higher value on self-service options such as online

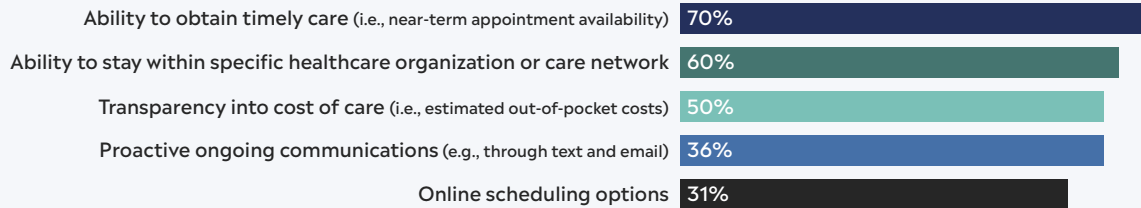
3. Acute care refers to unexpected, episodic care such as for a sudden minor illness or injury.



scheduling and virtual visits. For Gen Z, virtual visits (42%) are actually more important than the ability to schedule appointments through digital self-service (29%) whereas Millennials weigh flexibility in modality (virtual visits, 37%) and digital self-service scheduling (37%) in equal measure.

Figure 6. Top 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?



n=1,000

KEY TAKEAWAYS

- Cost, quality, and convenience continue to significantly impact the decision-making process for consumers, coupled with increased interest in online scheduling options—making it crucial for healthcare organizations to prioritize digital self-service and access to this breadth of information.
- Patients are consumers first—they are willing to shop around for care and comparing costs is part of their selection process, so providing deeper insight into cost of care information can become a differentiator for healthcare organizations.
- Consumers have embraced convenient care options, witnessed both in terms of where they have obtained care in the last year and where they prefer to obtain care for acute needs in the future.

Action: Digital channels are top of mind for an end-to-end patient access journey

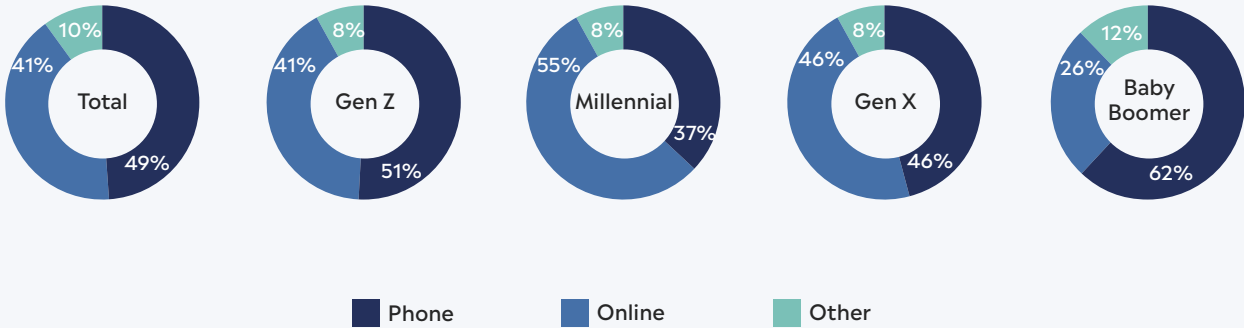
With the ongoing evolution of digital patient access, consumers show marked interest in not only scheduling medical appointments online but also completing other pre-appointment tasks through digital self-service methods.

The gap in preference between online and traditional scheduling channels has narrowed over the last three years of this survey, and now 40% of consumers prefer online booking. Younger age groups have embraced digital self-service, particularly Millennials who prefer online booking (55%) as their top choice over phone, while Gen X has an even split between phone and online (46% for each) (Figure 7).

This preference for digital channels is strong: of those who prefer online booking, half would switch providers for the ability to do so—underscoring the significance of digital self-service as a decision-making factor in care selection. Although interest in digital scheduling has steadily increased over time, not all organizations have widely adopted the offering. In fact, only 40% of top-ranked hospitals in the US enable consumers to book appointments with providers through their websites, and even fewer (10%) include service-based scheduling on their websites⁴.

Figure 7. Consumers’ Preferred Means of Booking an Appointment by Age Group

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



n=1,000

Despite growing preference for online self-service, consumers continue to cite scheduling via phone as their top preference for booking medical appointments. However, they experience varying outcomes through this channel—less than half were able to schedule an appointment on their first call into a healthcare organization call center and approximately 1/5 reported long hold times when calling. Of those who experienced long hold times, the majority (64%) were ultimately able to book an appointment via phone (on their first try or after calling back), but close to 30% gave up: 10% were unable to book an appointment even on their second try, and nearly 20% opted to get an appointment at a different organization or delay care instead. Additionally, only 6% utilized a self-service booking option after experiencing long hold times, further highlighting the disparity between preference for and access to online scheduling tools (Figure 8).

4. Kyruus Health. The State of Digital Patient Access. 2021.

Figure 8. Impact of Long Wait Times on Scheduling Outcomes

When you last called a hospital or health system to book an appointment and were put on hold for a long period of time, which of these options, if any, describe what you did next?

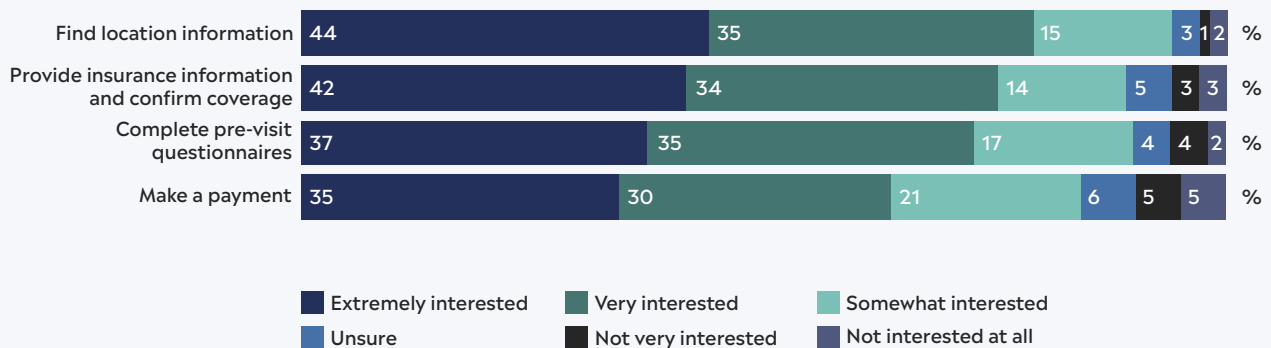


n = 178

A new area of focus for this year’s report gauged consumer interest in completing pre-appointment tasks via digital channels, and consumers clearly expressed that their desire for digital self-service doesn’t end with appointment scheduling. In fact, compared to phone or in-person options, consumers said they were extremely or very interested in the ability to complete pre-appointment tasks online, including finding location information (79%), providing insurance information and confirming coverage (76%), completing pre-visit questionnaires (72%), and making payments (65%) (Figure 9).

Figure 9. Consumer Interest in Completing Pre-Appointment Tasks Online

How interested are you in completing each of the following tasks online, as opposed to by phone or in person?



n = 1,000

Additionally, another new area of exploration this year was the method through which consumers want to receive communications about upcoming appointments, routine care, or pre-visit check-in information. Aligning again with the shift in preference toward digital channels, more consumers would prefer communication through digital options like text messaging (26%), email (26%), and mobile app notifications (13%). The remaining 1/3 cite the phone as their preferred method of communication.

5. This represents consumers who called back another time and were unable to book, those who delayed or skipped making an appointment, or those chose to book care with another organization instead.



KEY TAKEAWAYS

- Scheduling preferences for both online and phone channels showcase the continued need for a multi-channel access strategy that allows healthcare organizations to serve up information and appointment availability wherever consumers want it.
- Preference for digital self-service beyond scheduling is high—consumers show significant interest in having access to scheduling, check-in, payment options and other pre-appointment-related activities through digital channels.
- Communication preferences also lean digital, with consumers favoring text message, email, and mobile notifications over the phone channel for ongoing communication from healthcare providers.



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