KYRUUS

A BETTER MATCH
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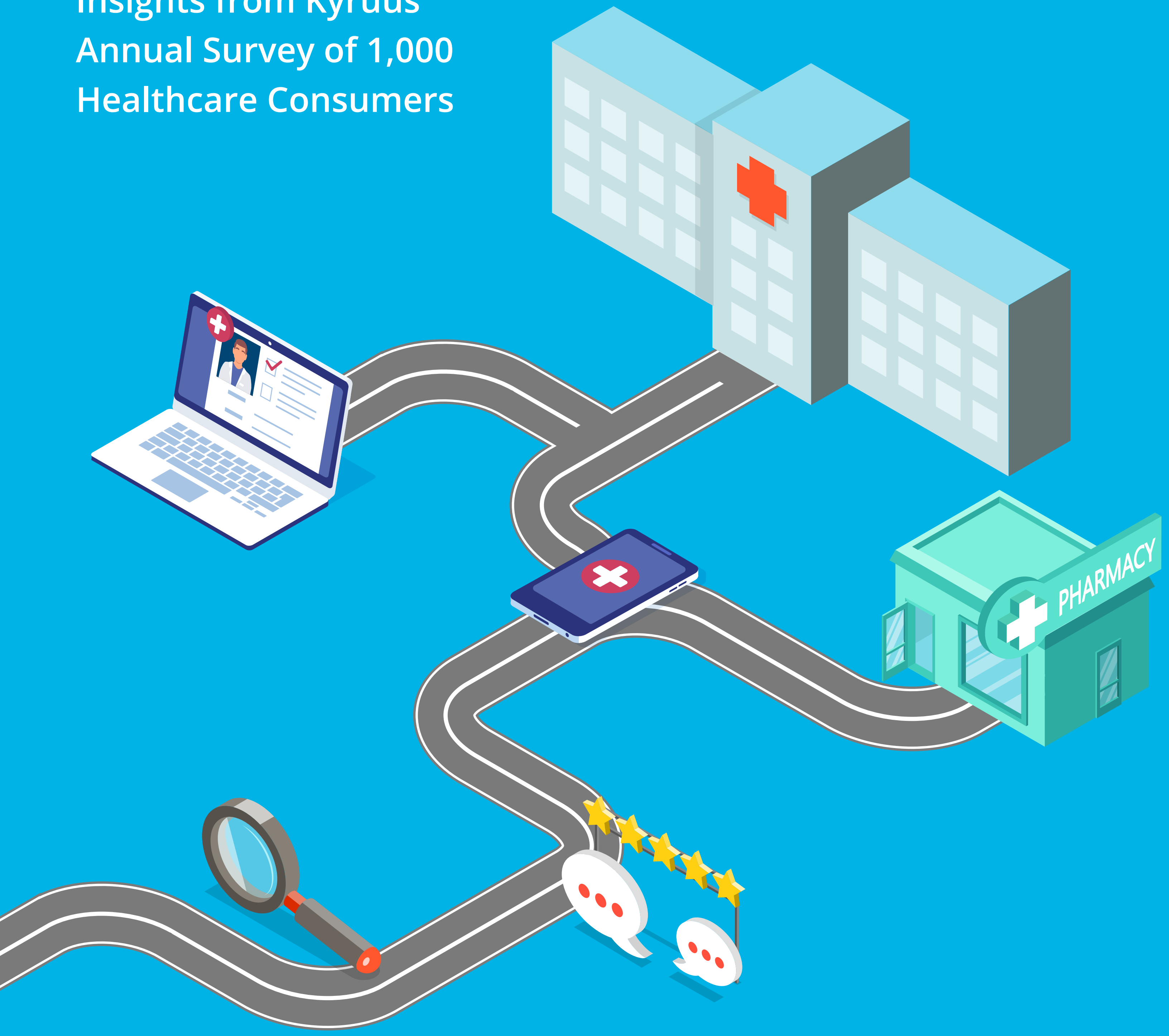
# 2019 Patient Access Journey Report

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



# INTRODUCTION: CONNECTING THE DOTS FOR A SEAMLESS PATIENT ACCESS EXPERIENCE

When it comes to accessing care, the patient journey is far from linear. Consumers frequently consult a variety of information sources and touch several channels across healthcare organizations on the road to obtaining an appointment. However, as non-traditional players, such as Amazon and CVS, enter the healthcare space to offer patients convenient care, health systems face rising urgency to deliver more seamless and satisfying access experiences. To compete effectively in this changing landscape, health systems need to start by better understanding how today's consumers access care—from how they build awareness of care options to what drives them to book an appointment or walk into a clinic.

Over the last three years, Kyruus has surveyed 1,000 consumers—spanning multiple generations and geographic regions—to understand how they search for, select, and access care. This year's results indicate that the demand for self-service research and booking options continues to rise—from a greater interest in patient ratings and reviews to a heightened desire to book online. Additionally, while consumers are spending more time on branded web properties, they have also shown a greater interest in engaging directly with health system and hospital staff, signaling the opportunity for health systems to elevate their brands with a more "customer-centric" approach that weaves together multiple points of access.

To help health systems connect the dots between key touchpoints and streamline the access experience, this report looks at the three key steps in the consumer's journey to care:

**1. AWARENESS:** Discovers healthcare providers and/or care delivery organizations

**2. ASSESSMENT:** Weighs healthcare options based on key criteria

**3. ACTION:** Finalizes decision and proceeds to book an appointment

### 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 2019. 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 and 2018 editions, our findings look at three key generational segments:

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

## KEY FINDINGS:

### Consumers Continue to Rely on Independent Research with Health Systems Becoming a Key Resource

When searching for a new provider, most consumers continue to conduct research online. While general internet searches remain the most common method, there is a growing preference for branded websites (e.g. health systems' websites) to gather information.

- While more than half of all consumers conducted a general internet search when looking for a healthcare provider, 43% consulted a health system's or hospital's website, up from 38% last year.
- 19% *began* their search for a provider directly on a health system or hospital website, up from 13% in 2017.

### Convenience and Care Quality Matter to Consumers Now More than Ever

Clinical expertise, insurance accepted, and speed of access remain among consumers' top decision factors, but they are placing a growing emphasis on the overall patient experience as well—from communication with providers to patient ratings and virtual care options.

- 2/5 of consumers report having looked for and ultimately switched providers to get an appointment sooner.
- Patient reviews was the number one answer for resources consumers want to see on health system and hospital websites (65%).

### Demand for Easier Access is Evident in the Increase in Consumers Seeking Online Booking and Alternative Care Sites

Research shows barriers to appointments still exist over the phone. Health systems can unlock new ways to meet patient demand by expanding non-traditional care options, such as virtual care and retail and urgent care clinics.

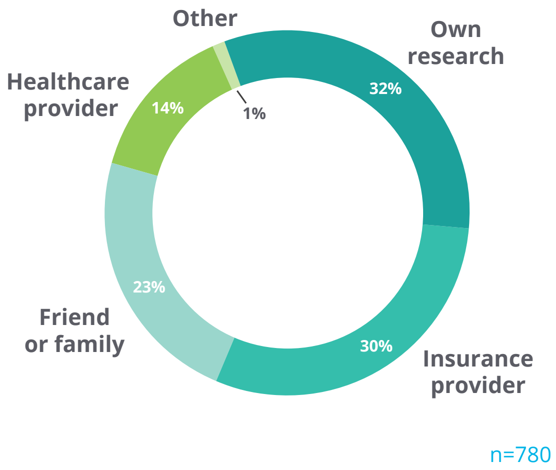
- Only 1/2 of consumers who called for an appointment were able to book an appointment over the phone on the first try.
- Close to half of respondents have visited an urgent care clinic in the last 12 months, with 46% citing speed of access as the top driver.

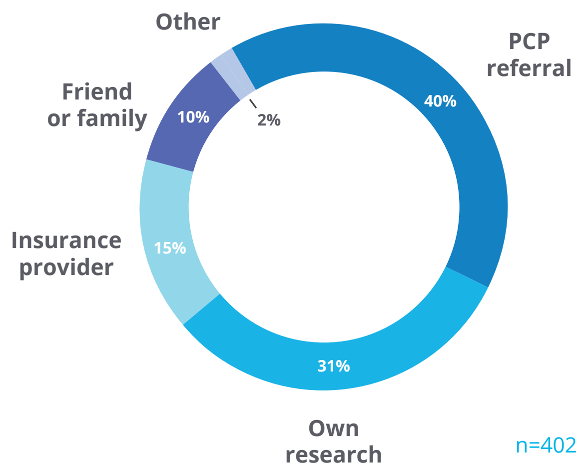
# CONSUMERS RELY ON INDEPENDENT RESEARCH FOR PROVIDER INFORMATION WITH A SHIFT TOWARDS PRIMARY SOURCES

*Independent research for care options continues to grow and consumers are increasingly leveraging health system websites and personnel to build awareness about available providers and services.*

The 2019 survey reveals that consumers are increasingly self-reliant during the research phase to collect information about potential care options. For the third year in a row, independent research continues to be the top method for finding a new primary care provider (PCP) (32%). While PCP referrals remain the primary method for finding a new specialist, this method has decreased five percentage points since 2018, while independent research increased six percentage points. This trend was particularly evident among digitally-savvy millennials—42% found a specialist through independent research. What's more, while 40% of consumers rely on PCPs for specialist referrals, 93% of all respondents indicate they always or sometimes conduct their own research after receiving a referral.

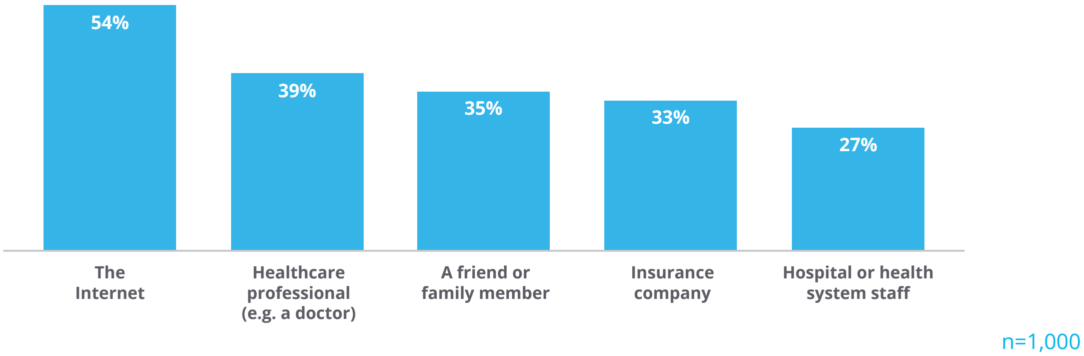
**Figure 1. How Consumers Find PCPs and Specialists**



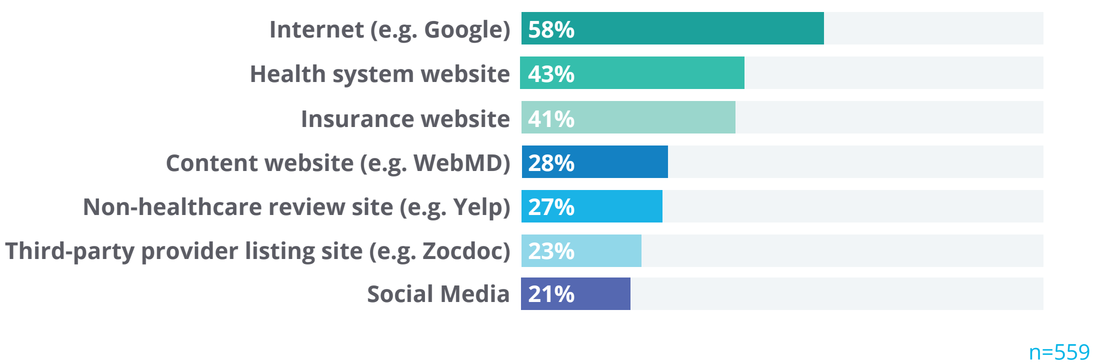

Regardless of the type of provider they need to see, consumers continue to rely on the internet as a key source of information when researching providers and services. Not surprisingly, more than half of all consumers went online to research providers, with 51% of those who conducted their own research ultimately finding their provider online.

**Figure 2. Consumers' Top Five Sources for Gathering Provider Information**




Additionally, the share of consumers who turn to health system or hospital staff for help finding providers increased notably: 27% of consumers consulted health system or hospital staff about providers, up from 19% in 2018 and 2017, indicating a growing view of health systems as a primary source of information.

**Figure 3. Consumers' Top Sources for Gathering Provider Information Online**




While general internet searches remain the top online source for learning about providers, consumer search preferences are shifting towards branded websites. For example, when asked how they typically approach a provider search in Google, 44% said they click a link to a health system's website, compared to 39% a year prior. In fact, for the first time in three years, a larger share of consumers report using a health system website to collect information (43%) than an insurance website (41%). Results indicate a similar trend when looking at where consumers start their online research: 19% of those who consulted the internet started their search for care directly on a health system or hospital website, up from 13% in 2017.

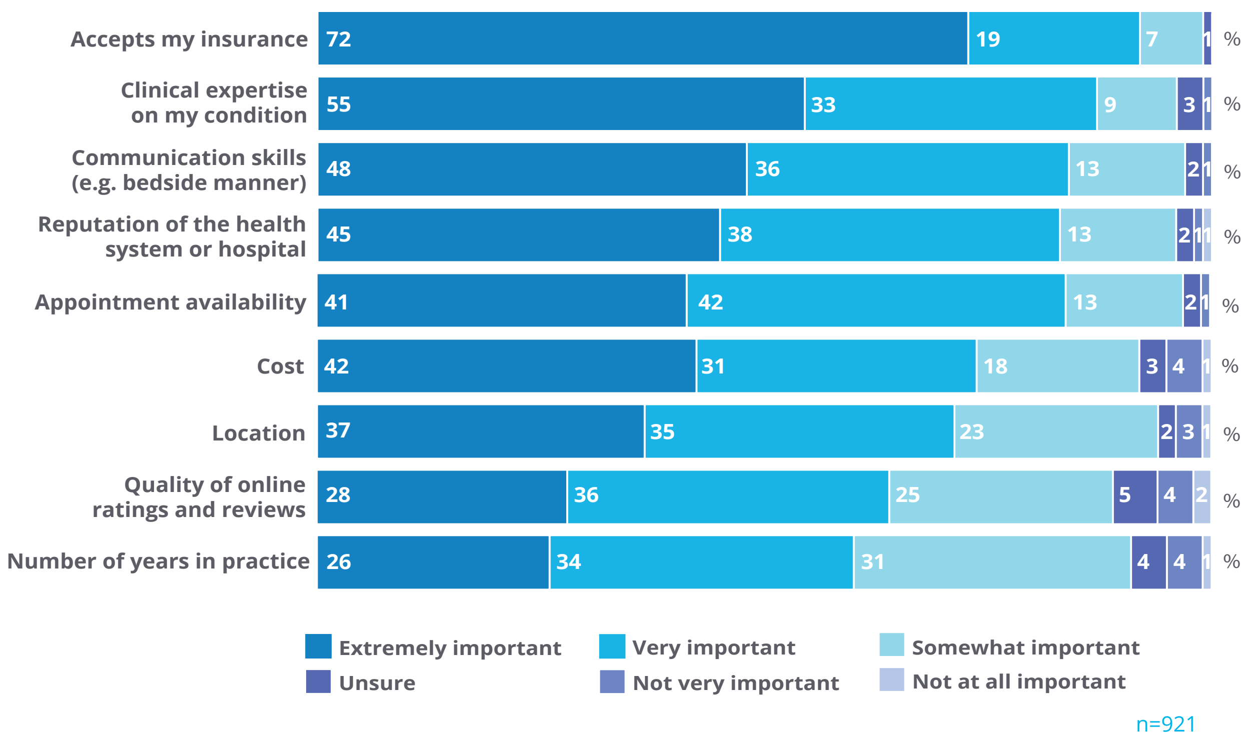
Leading health systems are expanding their definition of the "front door" to ensure that all consumers, whether "digital natives" or those less digitally-inclined, encounter consistent information as they build awareness of providers and services. The key to ensuring a smooth entrance into the health system or transition within it is to treat all access points—from Google to clinics and access centers–as part of an integrated engagement strategy. The result? An elevated brand presence for a broader set of consumers.

# CONVENIENCE AND PATIENT EXPERIENCE ARE KEY DECIDING FACTORS FOR CONSUMERS

*Today's healthcare consumers are seeking more streamlined access to information about care options to help connect the dots throughout their care journey and access timely care.*

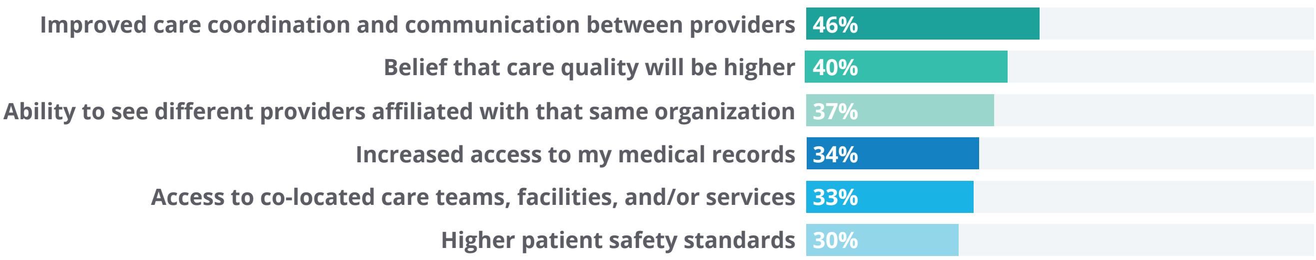
As consumers search for care, a provider's clinical expertise and accepted insurance plans remain the most important criteria for consumers when selecting a provider. While other criteria, such as appointment availability and health system reputation, also rank similarly to previous years, consumers are placing a growing emphasis on indicators of the quality of the patient experience (e.g., communication) and care (e.g., ratings & reviews). In fact, communication skills ranked within the top three in 2019: 84% consider it extremely or very important, up almost ten percentage points from 2018.

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



The emphasis on communication expands beyond patient-provider interactions. When asked about the importance of providers being affiliated with a health system, 71% of respondents said it is extremely or very important. The top reason? Improved care coordination and communication between providers (46%).

**Figure 5. Top Reasons Why Consumers Believe It's Important for a Provider to be Affiliated with a Health System**

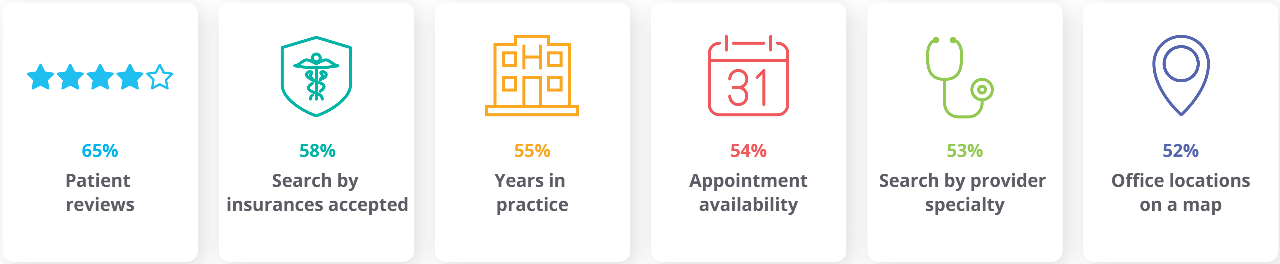



Note: Percentages indicate respondents who ranked the reason as one of their top three.

n=906

As consumers place a growing emphasis on communication and streamlined care coordination, they are turning to ratings and reviews more frequently to assess the patient experience and they are using this insight to narrow their options for new providers. In fact, the share of those who used non-healthcare review sites (e.g. Yelp or Google reviews), is up seven percentage points versus 2017. In addition, when asked about what resources they desire on a health system website, consumers overwhelmingly selected patient reviews (65%).

**Figure 6. Top Six Resources Consumers Desire on a Hospital or Health System Website**

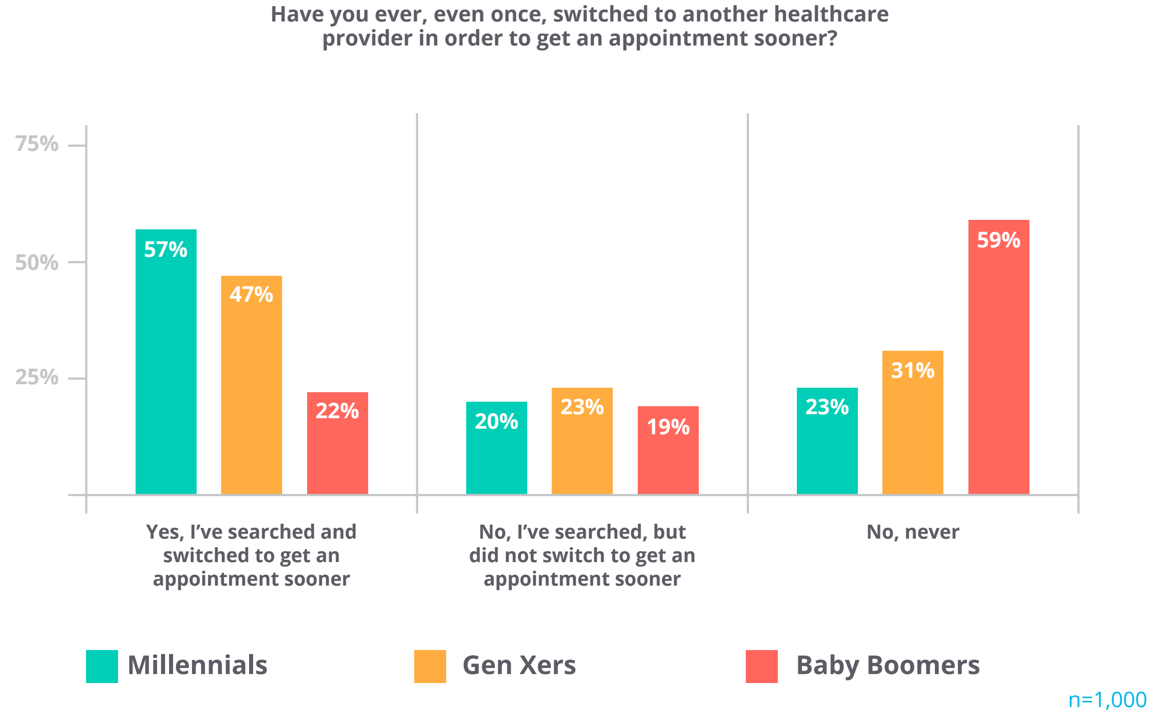



Note: Respondents were able to select multiple options.

n=239

Another critical factor for today's consumers across all generations is speed to access. In fact, when asked whether or not they have ever switched providers in order to get a sooner appointment, almost 60% of respondents indicated that they have looked for another provider in search for a sooner appointment. Of those, 39% said they had in fact switched providers to get a sooner appointment. Similar to last year, willingness to switch is highest amongst millennials (57%) and Gen Xers (47%).

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




Access to timely care is also a top priority when consumers evaluate care for their families and loved ones. This year, we asked respondents if they are responsible for making healthcare decisions for a relative or non-family member. Half of respondents indicated that they do evaluate care for someone else, with the majority placing "can be seen quickly" in their top three criteria when selecting providers.

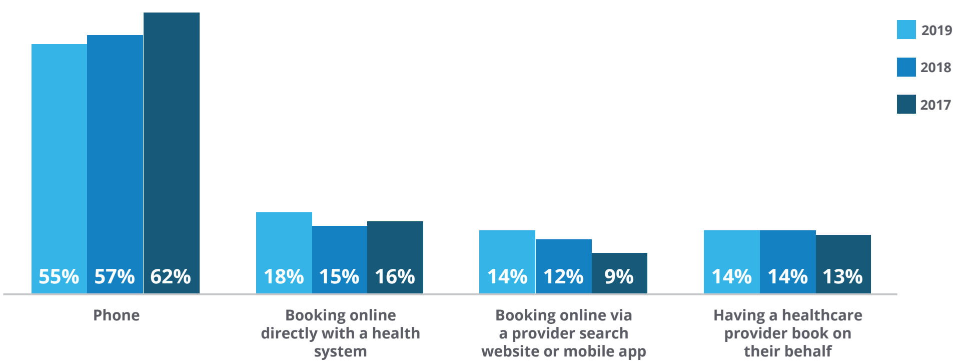
By focusing on consumers' decision-making journeys and ensuring that all stakeholders, including providers and health system staff, have access to robust information about in-network providers and appointment availability across the network, health systems can garner trust with consumers, particularly savvy researchers. This empowers consumers to navigate complex decisions both on their own and with trusted care teams across the system.

# HEALTH SYSTEMS MUST DIVERSIFY CARE DELIVERY AND SCHEDULING OPTIONS TO MEET CONSUMER DEMAND FOR EASIER ACCESS

*Whether it's the ability to book appointments online or get an appointment sooner, consumers are willing to switch providers for more convenient access. Health systems can tap into alternative care sites and care delivery methods (e.g., virtual care) to meet this demand.*

When it comes to booking appointments, more than half of all consumers still prefer to call, citing speed (54%), ease (45%), and personalization (43%) as the key reasons why. However, while 55% of respondents say that phone is their preferred method for booking appointments, this preference has declined over the last few years, down from 62% in 2017.

**Figure 8. Consumers' Preferred Means of Booking an Appointment**

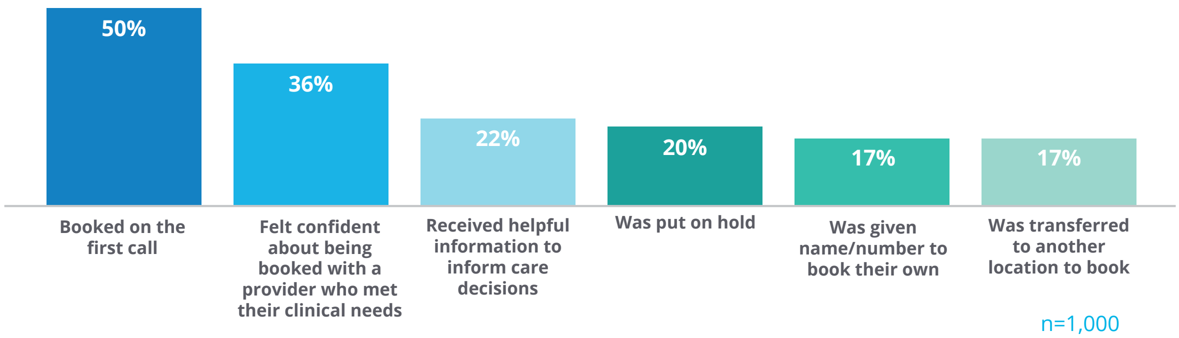



n=1,000

Despite the continued preference for phone-based booking, for the second year in a row, results indicate that barriers exist for consumers trying to schedule the right appointment over the phone. When asked to describe their experience the last time they called a health system to book an appointment, only 50% said they left the call with an appointment booked. What's more, 2/3 felt uncertain about whether they obtained an appointment with a provider who would meet their clinical needs

**Figure 9. Call Outcomes for Consumers Looking for an Appointment**

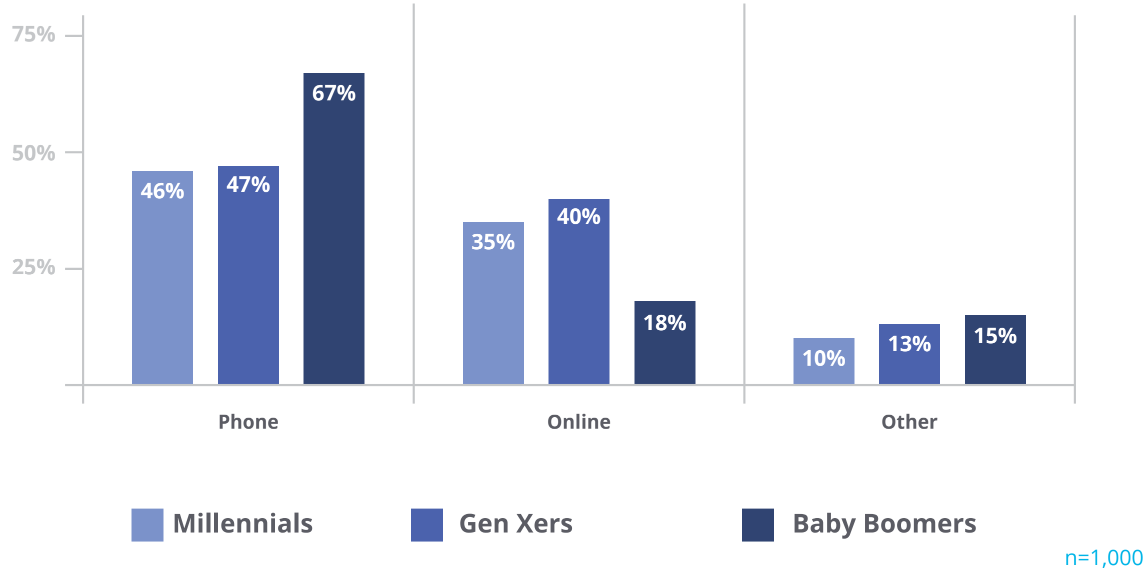
**When you last called a hospital or health system call center to book an appointment, which of these options, if any, described your experience?**




n=1,000

Meanwhile, 32% of all respondents reported a preference for online appointment booking, up from 27% in 2018 and 2017. Similar to last year, more than 1/3 of both millennials and Gen Xers prefer to book online, citing convenience (71%) and speed (62%) as the top reasons. In fact, over half of millennials and Gen Xers said they would switch providers for the ability to book appointments online. A surprising shift from last year's report is the number of baby boomers who are interested in online scheduling: 33% reported a willingness to switch providers for the ability to book online, up from 18% in 2018.

**Figure 10. Consumers' Preferred Means of Booking an Appointment by Age Group**




While demand for self-service scheduling options is substantial and rising, Kaufman Hall reports that only a third of leading health systems currently offer widespread online self-scheduling for existing patients. In addition, even fewer health systems offer online scheduling for new patients, highlighting a disconnect between the digital self-service capabilities consumers want and what is available today.[1]

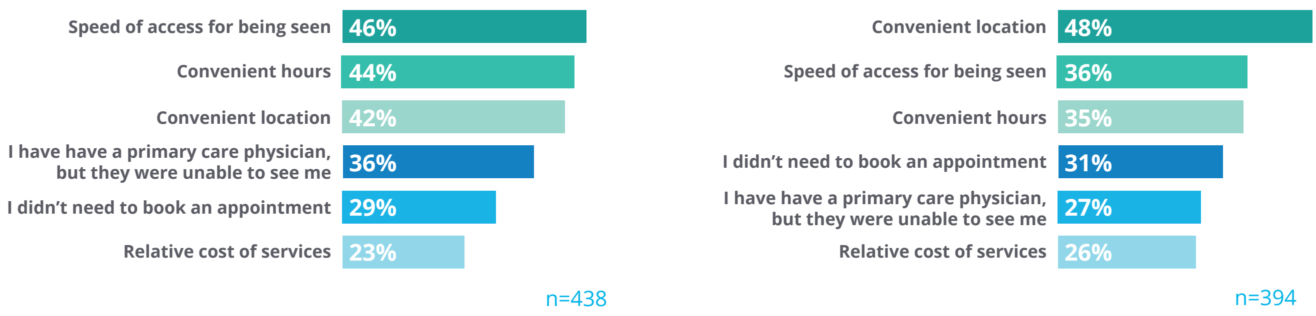
In addition to expanding the ways in which patients can book care, health systems have an opportunity to improve patient access by expanding offerings for walk-in clinics and surfacing these options to consumers as part of an integrated access approach.

1. Kaufman Hall. 2019 State of Consumerism in Healthcare, 2019.

More than 1/3 of respondents indicated that they visited a retail clinic (e.g., at CVS or Walgreens) in the last year, and most cited convenient location as the top reason. Urgent care visits were even more prevalent, with 44% of respondents having visited an urgent care clinic in the last 12 months. Speed of access for being seen was the key driver for all generations, followed closely by convenient hours and locations.

**Figure 11. Top Reasons Why Consumers Visit Urgent Care and Retail Clinics**

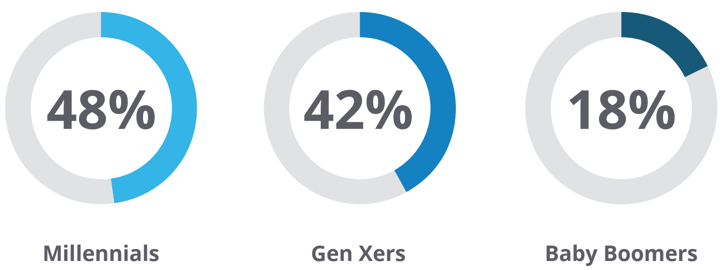
**Why did you decide to visit an urgent care clinic?** **Why did you decide to visit a retail clinic?**




In this year's survey, respondents indicated a strong interest in virtual care options, a new topic in the 2019 edition. While some health systems have pursued telehealth programs to streamline access to care, Kaufman Hall indicates that three-quarters of health systems have limited to no direct-to-consumer video or telephone offerings, with many citing consumer disinterest as the reason.[2] However, Kyruus' survey found that nearly 1/3 of all consumers had consulted with a provider virtually over the last 12 months, and 33% of respondents reported that they would be highly likely to switch providers for the ability to do so.

**Figure 12. Whether Consumers Would Switch Providers to Consult via Virtual Care**

**Given what you know today, how likely would you switch for the ability to consult via telehealth or virtual visit appointment?**




Note: Graph represents percentage of repondents who answered "Definitely Would" or "Very Likely." n=329

Health systems have a significant opportunity to improve conversion and generate brand loyalty by not only removing barriers in the booking process, but also expanding alternative care sites and virtual care options to offer consumers more timely access to care.

2. Kaufman Hall. 2019 State of Consumerism in Healthcare, 2019.

## CONCLUSION: HEALTH SYSTEMS NEED TO TAKE A CONSUMER-CENTRIC APPROACH TO ENHANCING PATIENT ACCESS

As health systems pursue a more consumer-centric approach to access, leaders can begin to connect the dots of an often disjointed access experience by mapping the patient access journey—from how consumers initially search for care options to how they ultimately schedule appointments—at their organizations. While brand plays a powerful role in attracting consumers, convenient and seamless access experiences are essential for driving long-term brand loyalty.

This year's findings illustrate that health systems can break away from the pack not only by leveraging their brand equity, but also by diversifying their offerings to make it easier for consumers to access care, such as through virtual care and online scheduling options. However, the key to a connected access journey is consistency and visibility across access channels. Whether consumers seek care online, call to make appointments, or walk into clinics, accurate information about providers' clinical expertise, appointment wait times, and other important decision criteria will help foster meaningful engagement with new and existing patients alike. In today's landscape, to capitalize on their brand equity and win patient loyalty, health systems will need to deliver a coordinated, cohesive patient experience that also meets consumer expectations for convenience.

## 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 more than 225,000 providers across leading health systems nationwide, the Kyruus ProviderMatch® suite of solutions—for consumers, access centers, and care settings—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.