

# MEETING THE HEALTHCARE CONSUMER WITH A DIGITAL-FIRST APPROACH

## The DocASAP 2nd Annual "State of Patient Access and Engagement" Survey Offers Insights on the Digital Front Door



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# EXECUTIVE SUMMARY

The rapid advance of COVID-19 turned every activity from school to movies into digital-first experiences. In healthcare, the near-total shutdown of in-person elective care at the beginning of the pandemic disrupted patient access. The gradual resumption of patient-provider interaction has since paved the way for a remarkable surge in digital health.

The customer experience and engagement tools developed by online retailers have set an exceedingly high standard. Now more than ever, healthcare consumers demand convenient, seamless digital healthcare experiences, and the healthcare industry will need to catch up quickly to meet their expectations.

- In the 2020 Change Healthcare–Harris Poll Consumer Experience Index[1], 81% of patients said shopping for healthcare should be as easy as shopping for other common services
- Accenture's Digital Health Technology Vision 2020 survey[2] revealed that 85% of health executives acknowledge that technology has become an inextricable part of the human experience, and 90% of health executives believe that to compete in a post-digital world, organizations must elevate their relationships with customers as partners.



*"Digital and virtual medicine is very critical in our mix, and that mix is going to stay. There's no going back. The challenge for us is ensuring the way we operate is adjusted to this new normal. With COVID-19 we've been [implementing digital health] in a reactionary way, but longer-term we need to figure out how services are balanced across physical and digital channels."*

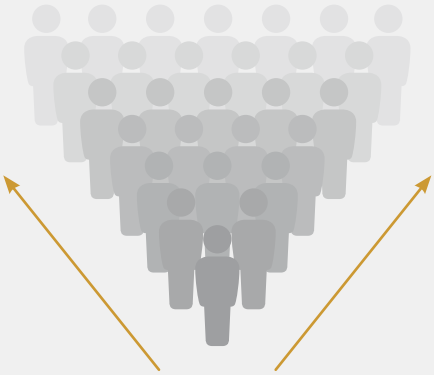
***San Banerjee***
*VP Digital Experience, Texas Health Resources*

For the second year in a row, we have partnered with OnePoll, a leading research firm, to conduct a survey that offers an up-to-date understanding of consumer attitudes and preferences around patient access and engagement and shows how healthcare providers are meeting patient expectations. We are pleased to offer insights from DocASAP's 2nd Annual State of Patient Access and Engagement Survey.[3]



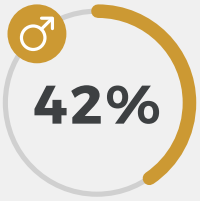
# SURVEY DETAILS

## DEMOGRAPHICS

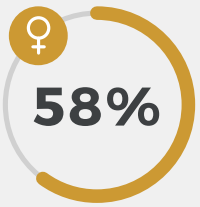


**1,000 PARTICIPANTS**

### % BY GENDER

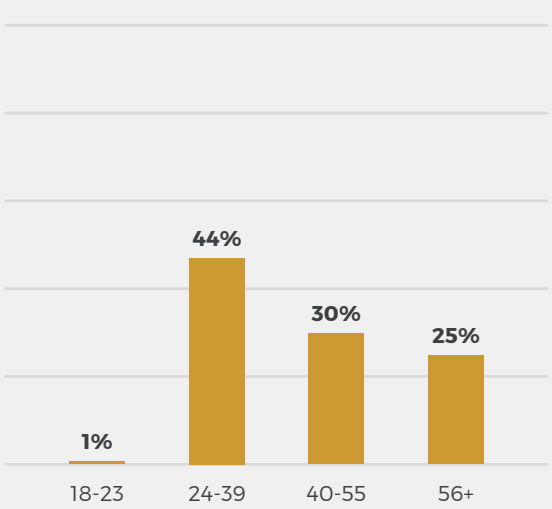



Male




Female

### % BY AGE





# QUICK & CONVENIENT

## ACCESS IS KING

Since COVID-19 imposed a nationwide disruption of healthcare delivery, more consumers report that convenient, timely care is of value to them. Increasingly patients are embracing digital health technology that grants them the instant, seamless patient experience they desire. In a September 2020 survey by Xtelligent Healthcare Media[4], 45% of healthcare executives said patients will also demand more timely care in the new normal. The report goes on to say that, "Throughout the pandemic, patients became accustomed to seeing their doctor through a video or phone call. So, as they readjust to the new normal, many patients will expect to receive the same quick and timely care."

## SURVEY INSIGHTS:
# SPEED & CONVENIENCE

**Patients value convenience when booking appointments:**

**74%** of patients report that being able to schedule a healthcare appointment outside of business hours is important to them

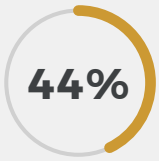
**48%** of consumers prefer to schedule appointments online, compared with 39% over the phone and 10% in-person

**84%** of consumers prefer to wait no more than two weeks for an appointment, up 4% from last year

**80%** find some aspect of scheduling care challenging



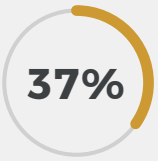
**Patients are motivated to switch providers if they can access care more quickly or conveniently. Factors that patients say would motivate them to switch providers include:**




Provider's location is more convenient (distance/location)



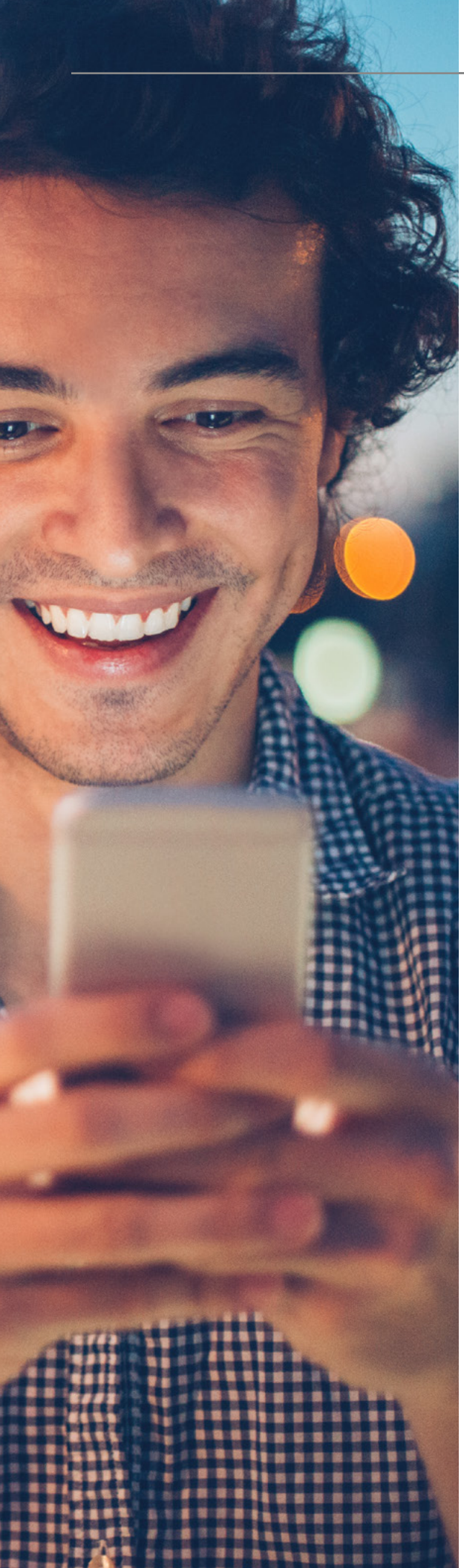

Provider is available for both telehealth and in-person visits




Provider has near-term availability when I need care

**Top barriers encountered when scheduling appointments:**

1. *I have to wait a long time to see a doctor after I've scheduled my appointment*
2. *I can only schedule an appointment during business hours*
3. *I can't find the right doctors for my specific care needs*
4. *It takes too long to schedule an appointment by phone*
5. *I would like to schedule care online, but there isn't a convenient option*

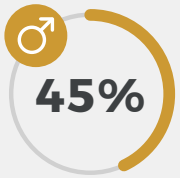




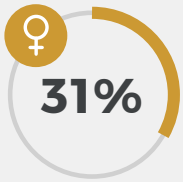
## Gender matters when accessing care

Men are more willing to embrace digital health technologies like telehealth and see a new provider who offers quicker and more convenient access to care. Women, however, would rather see a provider they already know and trust than explore alternate options. More from the survey:

**Percentage who would switch providers if one has near-term availability when they need care:**

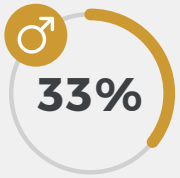



Men

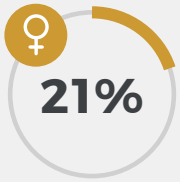



Women

**If a primary care doctor were unavailable, the percentage who would consider using a different provider at a different practice in-person:**

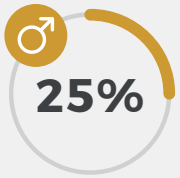



Men

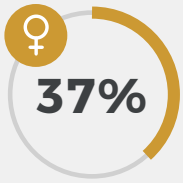



Women

**If a primary care doctor was available, the percentage who would only see that provider in-person:**




Men




Women

## EDGING OUT THE COMPETITION WITH
# PATIENT ENGAGEMENT

Harvard Medical School defines patient engagement as "a collaborative process in which patients are given the knowledge, skills, and resources to become active participants in their own health care management. This includes improved access to health information, shared decision-making, and greater connectivity with care teams."[5] Patient portals – now a common component of provider web sites – allow registered users to access medical records, request a prescription refill or an appointment, and use a form to send a message to their doctor. Accelerated by pandemic safety and prevention concerns, digital engagement is pushing beyond the confines of the portal.



As patients take greater ownership of their health journey, there's an opportunity for providers to increase and strengthen engagement by taking on the roles of educators, partners, and coaches in a more collaborative and outcome-oriented approach to care. This can help close gaps in care, encourage patients to take proactive, preventive care measures, and help patients prepare for and follow-up on their appointments.

Digital patient engagement has become a key differentiator in competitive healthcare markets. Engagement via pre- and post-appointment notifications also encourages patients to communicate more with providers.

- According to Accenture's 2019 Digital Health Consumer Survey[6], 70% of patients say they are more likely to choose a provider that offers reminders for follow-up care via email to text.
- In CVS Health's 2020 Path to Better Health Study[7], 48% of consumers said that digital messaging through email, text and patient portals would make them more likely to communicate with their providers.



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## SURVEY INSIGHTS:

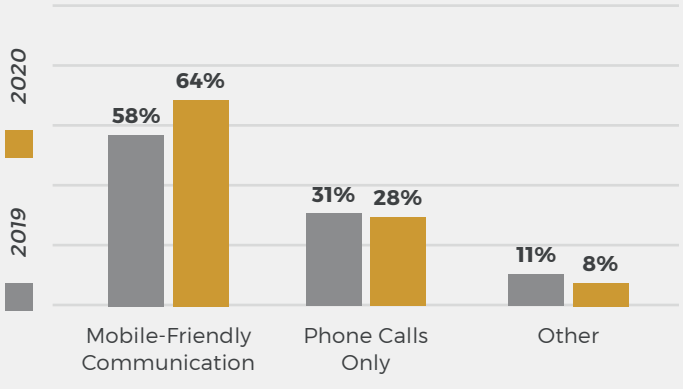
# PATIENT ENGAGEMENT

**56% of patients prefer pre-appointment communications to be sent digitally via text message or email.**




**64% of respondents prefer mobile-friendly channels (email, SMS, mobile app, online portal) for post-appointment communications, vs 27.9% who preferred phone calls.**

**Compare: In 2019, 58% preferred digital channels and 31% preferred phone calls.**



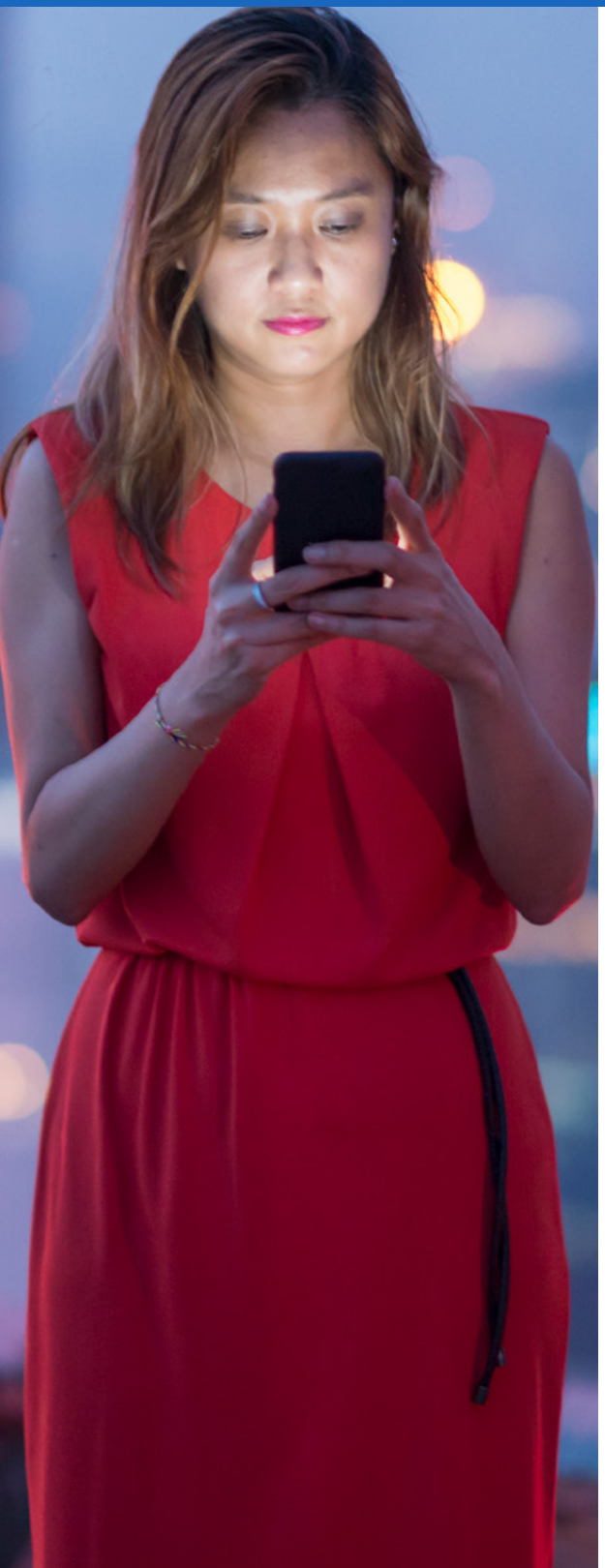


## ARE HEALTH PLANS
# THE NEW AMAZON?

Hungry for an 'Amazon-like' experience, consumers increasingly rely on their health plans not just to compare healthcare costs, but to guide them towards the timely, convenient care they demand. In a recent article analyzing how digital health is reshaping US health insurance, McKinsey & Company writes that payors are leveraging new technology to become a "trusted partner" for members throughout their care journeys. The article notes, "payers that invest thoughtfully in human-centric digital transformation are beginning to see value, including material changes in member satisfaction and trust, increased revenue from digital branding and improved sales tools, and double-digit reductions in administrative costs."[8]

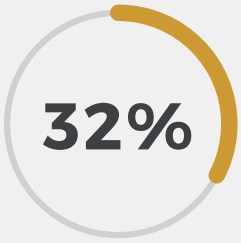
SURVEY INSIGHTS:

# CHOOSING PROVIDERS, SCHEDULING APPOINTMENTS



**70% of consumers say they use healthcare provider or health plan websites to search for a provider, each beating out search engines like Google, social media, and family recommendations.**

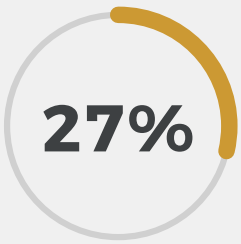
**Patients say they use health plan websites to schedule appointments just as much as they use it to check their health plan coverage. Scheduling is more popular than comparing costs for procedures.**



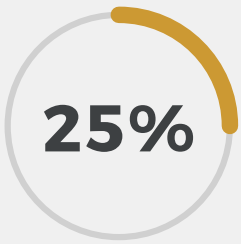

Schedule an Appointment




See benefits and coverage details specific to your plan




Compare costs for a procedure or doctor's visit




Find in-network providers



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## WHEN IT COMES TO CARE SETTINGS

# CONSUMERS WANT CHOICE

The onset of the COVID-19 pandemic and the ensuing shutdown of non-essential medical procedures led to an explosive increase in the number of care providers offering telehealth services. The three-to-four-week period in which non-essential in-person procedures were limited created "telehealth consumers" out of many people who might not have chosen it before.

The dramatic growth in telehealth has pulled virtual care into the mainstream.

- According to a Forrester survey[9], virtual visits will exceed 1 billion in 2020.
- Doximity's 2020 State of Telemedicine Report[10] predicts that 20% of all medical visits in the U.S. will be conducted via telehealth this year, representing $29 billion of medical services. By 2023, telehealth visits will represent $106 billion in medical services.

As hospitals, clinics, and medical offices reopen, and patients once again have the option of booking elective and outpatient procedures as well as telehealth appointments, patterns of preference are emerging.

## SURVEY INSIGHTS:

# CARE SETTING PREFERENCES DIFFER ACCORDING TO AGE

- **44% of healthcare consumers** prefer to receive a combination of both in-person and virtual care post-COVID-19.
- **While the pandemic had initially driven consumers away from in-person settings and towards telehealth, younger consumers report that they want access to both**.
- **50% of Millennials** prefer both in-person and telehealth appointments, while 32% would prefer in-person only and 17% telehealth only
- **56% of Boomers** prefer in-person appointments only, while 39% say they would want access to both in-person and telehealth appointments and 4.8% said telehealth only.
- **84% of Boomers** named the doctor's office as their preferred care setting for non-urgent care.
- **67% of consumers** say they would consider alternative care options even if their provider was available.

**Patients overwhelmingly want to receive non-urgent care at the doctor's office.**



**59%** Doctor's Office

**29%** Urgent Care

**28%** Walk-in Clinic

**27%** Online/Telehealth

**24%** Hospital

**10%** Emergency Room

**7%** None

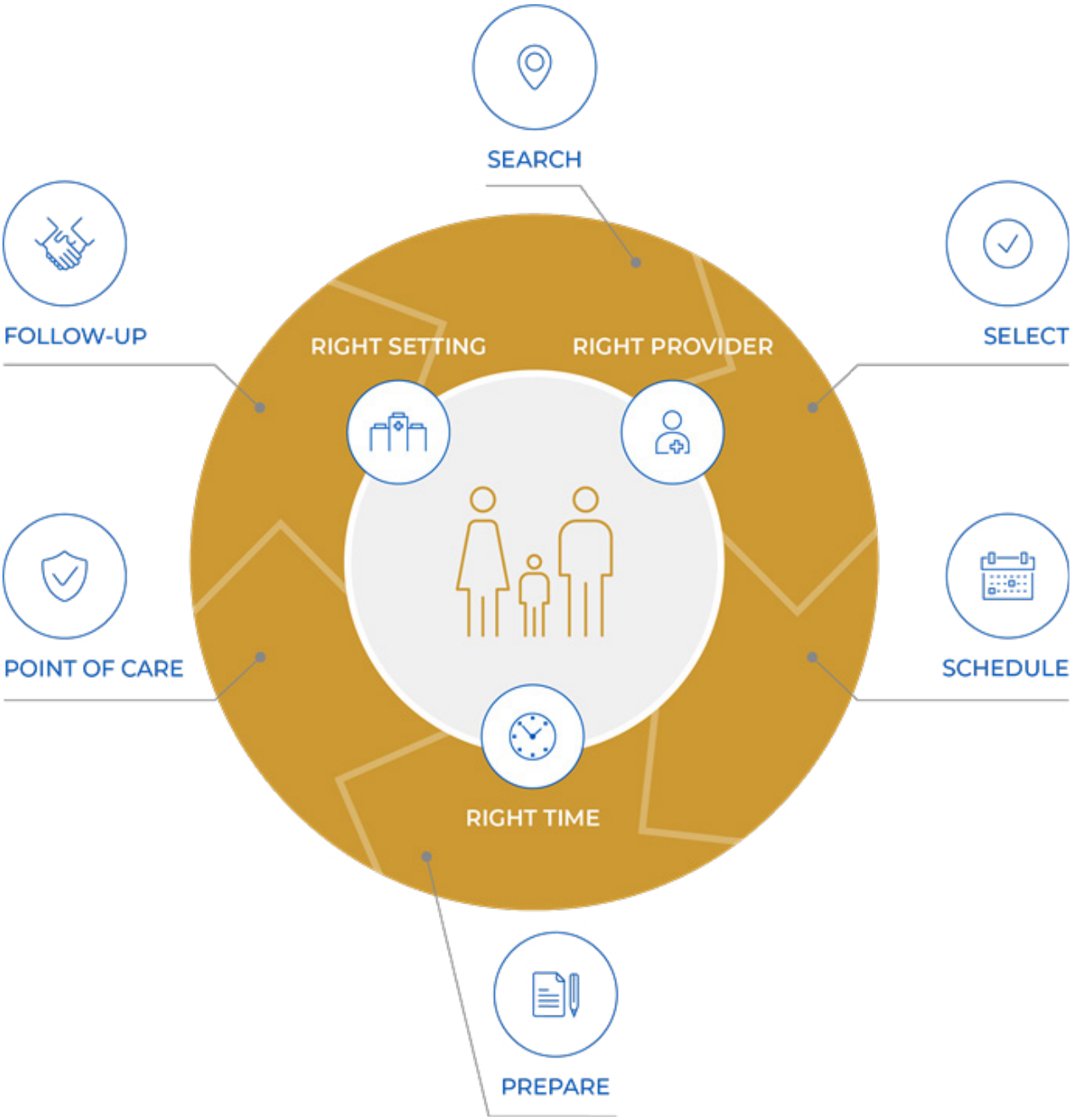
**Consumers are wary of receiving care in emergency rooms and hospitals. Only 24% consumers would seek non-urgent care at a hospital, and only 10% in an emergency room.**

- The Kaiser Family Foundation reports[11] that total hospital admissions will be about 10.5% below the predicted volume for 2020.
- JAMA reports[12] that Emergency Department volumes dropped 42% in April 2020 vs. the same month in 2019

## 10-STEP CHECKLIST FOR

# GOING DIGITAL-FIRST

Patient access is not a linear process, but a cycle. To successfully offer a digital-first consumer experience, providers should leverage these recommendations to meet patients at any point in their journey from provider search and selection, to scheduling, preparing, point of care, and follow-up.



# Ten recommendations to attract and serve patients in the telehealth sphere:

1. **Rethink your patient access model** as a cycle and create opportunities to meet consumer demand anywhere in their care journey, with digital experiences that are on par with other consumer industries.

2. **Enhance your consumer-focused digital front door** to give patients a seamless experience when accessing care, whether finding a provider, scheduling an appointment, completing pre-visit forms, providing insurance information, or checking symptoms.

3. **Partner with health plans** to provide a popular, yet untapped digital channel for consumers to seamlessly search for and schedule appointments online, with a provider that matches their clinical and timely care needs. This creates the added benefit of offering another convenient way to schedule care—and attract more patients.

4. **Create and deploy effective communication methods** for appointment reminders and confirmations, and post-appointment follow-ups based on patient preferences.

5. **Use a multi-channel and cross-platform approach for digital patient access**. Consumers should be presented with provider search and online appointment scheduling through your health system website, health plan websites, mobile apps, social media, Google My Business listing, etc.

6. **Leverage telemedicine to accommodate more patients and open appointment slots**. Replicate front office/intake protocols in virtual visit scheduling to ensure accurate, real-time availability. Add telemedicine information and filters to provider directories so patients can search for providers that offer virtual visits.

7. **Develop partnerships with innovative companies** that have domain expertise and proven success, to upgrade your consumer access and engagement capabilities. *Example: add digital scheduling offerings.*

8. **Measure the value of your patient access initiatives** by tracking access improvement, cost savings, and patient/provider satisfaction.

9. **Ensure that appointment reminders provide patients with options** to easily reschedule or cancel the appointment.

10. **Proactively follow up with patients after their visit** using automated email and text notifications to prompt them to schedule their next appointment.

## SOURCES

1 https://hitconsultant.net/2020/07/13/consumers-stated-covid-19-made-telehealth-indispensable-in-healthcare-delivery/

2 https://www.accenture.com/_acnmedia/PDF-130/Accenture-Health-Tech-Vision-2020.pdf

3 DocASAP 2nd Annual State of Patient Access and Engagement Survey {**Link here**}

4 https://patientengagementhit.com/news/covid-19-will-push-patients-to-demand-more-timely-care-access

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10 https://c8y.doxcdn.com/image/upload/v1599769894/Press%20Blog/Research%20Reports/2020-state-telemedicine-report.pdf

11 https://www.kff.org/health-costs/issue-brief/trends-in-overall-and-non-covid-19-hospital-admissions/

12 https://jamanetwork.com/channels/health-forum/fullarticle/2770930



## ABOUT DOCASAP®

DocASAP provides the leading patient access and engagement platform for health systems, health plans and physician groups, Backed and promoted in the market by Aetna and UnitedHealthcare, DocASAP builds unique payor-provided connections with an eye towards simplified access, increased care compliance and improved population risk management. DocASAP's intelligent patient-provider matching and online appointment scheduling solution enables patients to connect with optimal care providers to enhance access, improve outcomes and reduce costs.

**For more information or to request a demo, visit docasap.com**