

The 2024 Care Access Benchmark Report

for Healthcare Organizations

Consumer Insights to Help Boost New Patient Acquisition, Prevent Care Gaps, and Drive Operational Efficiencies



Contents

The State of Care Access.....3

About the Survey 4

From Clicks to Care: Acquiring Patients
with Many Digital Front Doors5

Closing Gaps and Delivering Care:
Overcoming Barriers to Access.....12

Making Every Dollar Count: Streamlining
Operations and Enabling Self Service19

Taking Action: What Healthcare Organizations
Can Do Today to Improve Access to Care24



The State of Care Access



There's no shortage of challenges for leaders looking to improve the patient experience and ensure that healthcare works better for everyone. The healthcare landscape continues to increase in complexity, with organizations facing evolving consumer demands, ongoing workforce shortages, and competition from industry disruptors. At the same time, mounting financial pressures, including surging expenses and reduced patient volumes, are straining already tight budgets.

Amid a constant state of change, healthcare organizations are prioritizing three key strategies:

- Boosting patient acquisition and engagement
- Getting people connected to the right care
- Driving operational efficiency and resilience

Healthcare Organizations Must Advance Digital Strategies to Achieve Business Goals

Despite significant advancements in their digital strategies, healthcare organizations still have room for improvement to effectively attract new patients, prevent care gaps, and enhance operational efficiency.

Kyruus Health conducted a survey of 1,000 healthcare consumers from various generations and locations to assist healthcare organizations in identifying new ways to refine their digital strategies. The 2024 Care Access Benchmark Report reveals consumer preferences and expectations throughout their journey of accessing care. Included in the report are key areas organizations can focus on to boost consumer engagement and seamlessly connect them to the right care options, while also streamlining their internal processes.

About the Survey

Findings in the 2024 Care Access Benchmark Report are based on a survey of 1,000 healthcare consumers conducted by Wakefield Research in April 2024 on behalf of Kyruus Health.

All sample sizes in the report are n=1,000 unless otherwise noted.

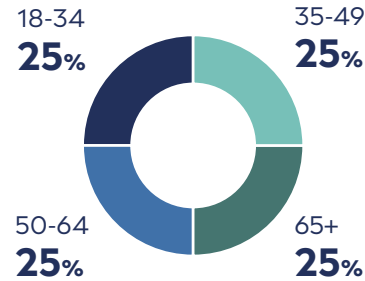
Size:
1,000 U.S. Residents

Date:
April 2024

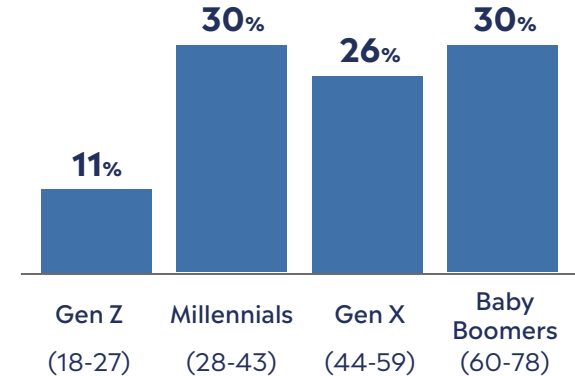
Gender:



Age:

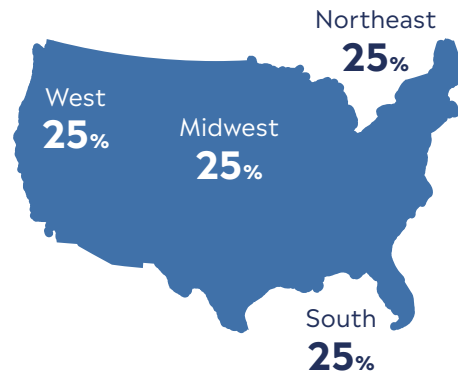


Generation:*

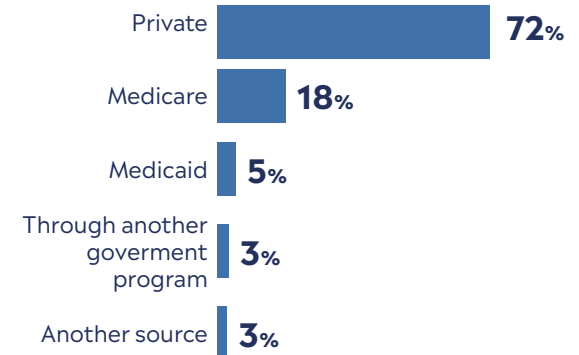


*NOTE: The remaining 3% are consumers older than 77 (who are not included as a subgroup in the survey)

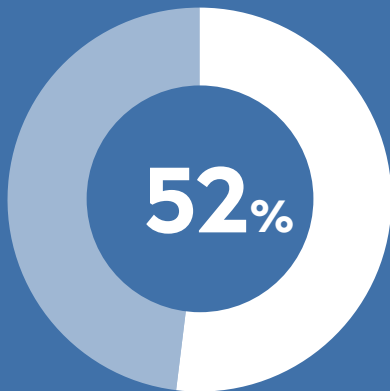
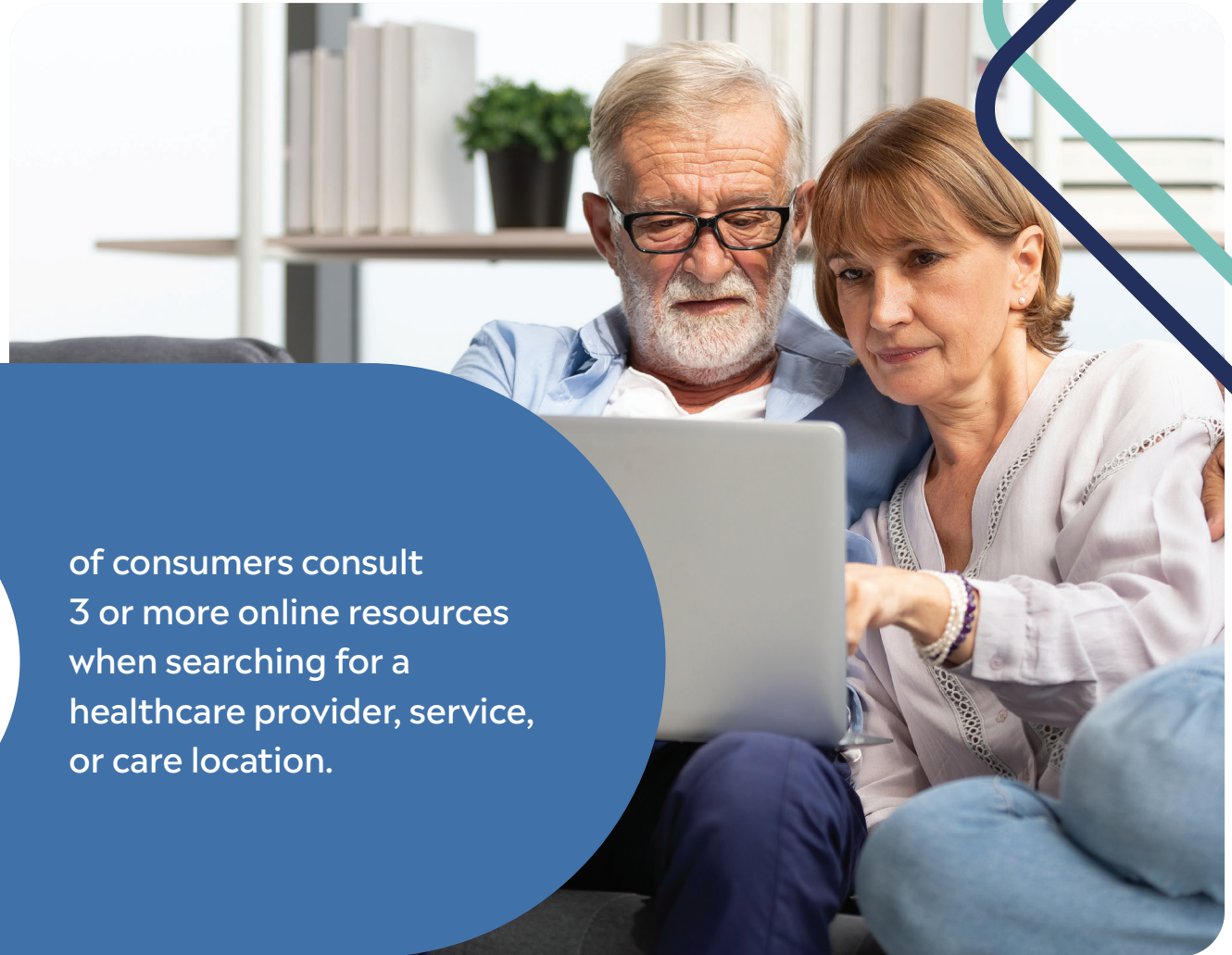
Location:



Type of health insurance:



From Clicks to Care: Acquiring Patients with Many Digital Front Doors



of consumers consult 3 or more online resources when searching for a healthcare provider, service, or care location.

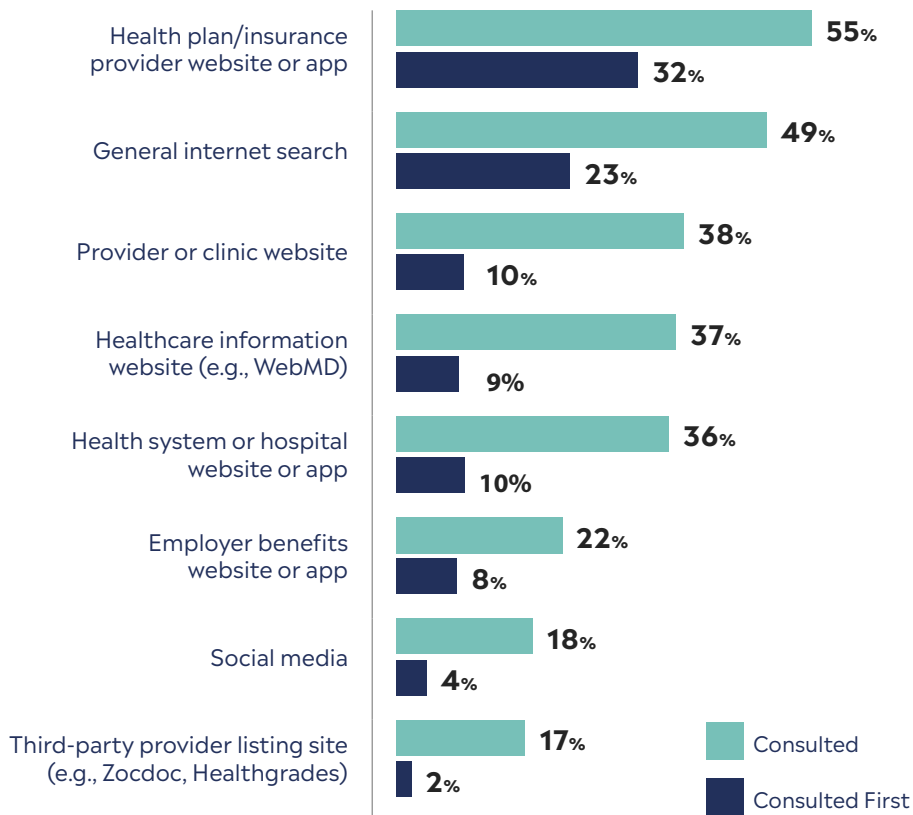


Health Plan Websites Are Now the #1 Digital Front Door

More often than not, health system websites are not the first place that people consult when gathering information about where to receive care—for the second year in a row, most consumers instead look first to their health plan’s website or app. This underscores the urgent need for organizations to ensure that information about providers and locations is up to date not only on their owned properties but also across channels.

Consumers' Top Online Resources For Gathering Information

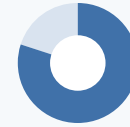
Which resources, if any, did you consult in your online search for a healthcare provider, service (e.g., imaging, labs), or care location (e.g., urgent care facility)?



n=700

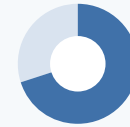


Nearly
80%



of consumers would **schedule appointments from their health plan website** if they could, consistent with last year.

70%



of consumers **went online the last time they searched for care.**

ACTION PLAN: ESTABLISH HEALTH PLAN CONNECTIONS

With health plan websites and apps being the top resource that consumers turn to when searching for care, healthcare organizations need to ensure that their provider and location data is both up-to-date and enriched in this channel. Organizations looking to boost new patient acquisition may take it a step further and allow consumers to schedule appointments directly from health plan sites, creating a truly seamless experience across channels.

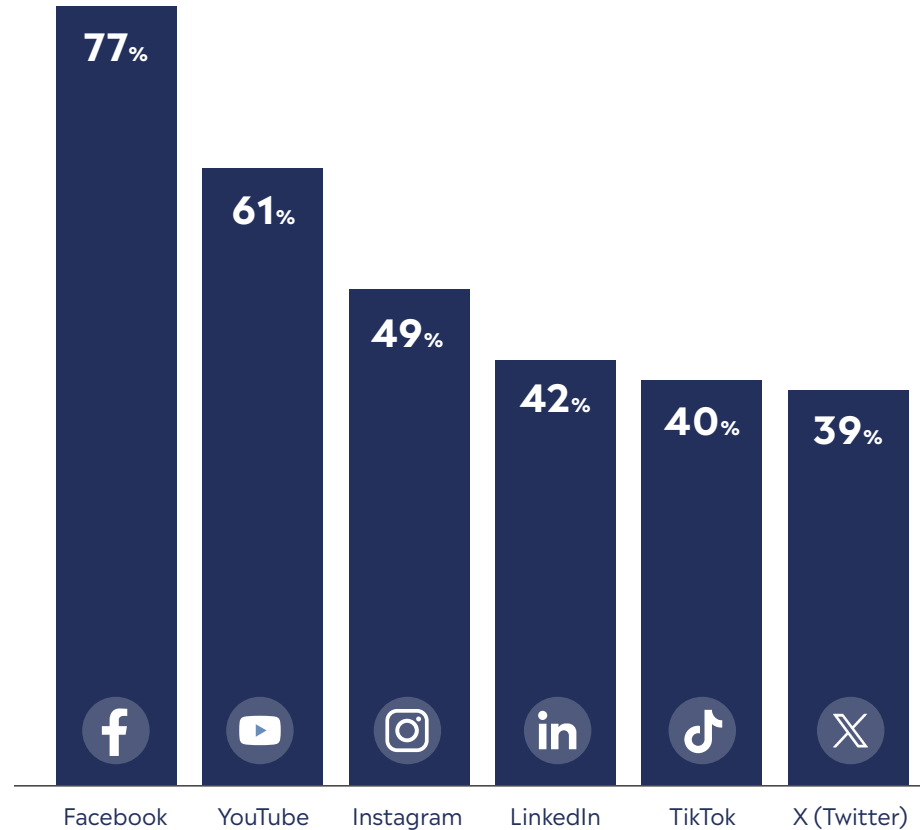


Consumers Go Broad When Searching for Care Online

When they're not consulting their provider or health plan, consumers increasingly turn to social media for information. Facebook is the most popular for all generations except for Gen Z, who prefer YouTube. By embracing a variety of channels beyond their own website, healthcare organizations can attract and convert patients of all ages.

Social Media Channels Consumers Consult When Searching For Care

Which of the following social media sites or apps did you consult in your online search for a healthcare provider, service, or care location?



n=124



1 in 5 

people—and over 25% of younger consumers—who search online for care options **use social media**.

1 in 4 

millennials **visit third-party listing sites**, such as Zocdoc or Healthgrades, when searching for care.



of consumers **consult three or more online resources** when searching for care online.

ACTION PLAN: PRIORITIZE ACCURACY OF SOCIAL PRESENCE AND THIRD-PARTY LISTINGS



It's not enough to focus on your owned properties or website—you also need to ensure that your provider data and appointment availability is accurate across channels. To improve your broader presence, start by focusing on the places consumers are most often searching for care—i.e., health plan sites and Google searches—and expand from there. Then, take it a step further and consider allowing people to schedule directly from these channels to make it even easier to capture patient demand.

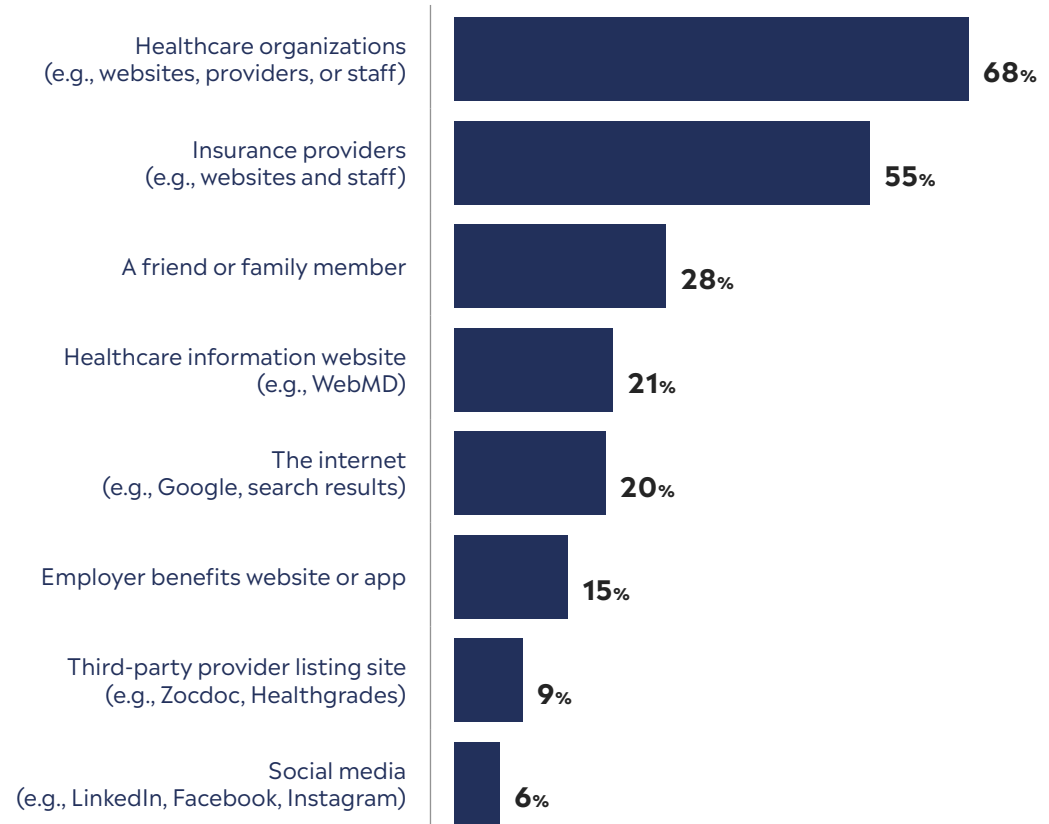


Trust, Accuracy, and Care Access Are Inextricably Linked

Healthcare organizations continue to be seen as the most trustworthy resource for gathering information, closely followed by health plans. However, incomplete or inaccurate provider data leads to care gaps, as many consumers will delay or skip seeking care altogether as a result.

Resources That Consumers Consider Most Trustworthy For Provider, Location, 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, service, or care location?





34%



of consumers have encountered inaccurate provider information **within their health plan transparency tools** (e.g., health plan find-a-doctor, cost estimates for procedures, guidance on insurance-covered options).

30%

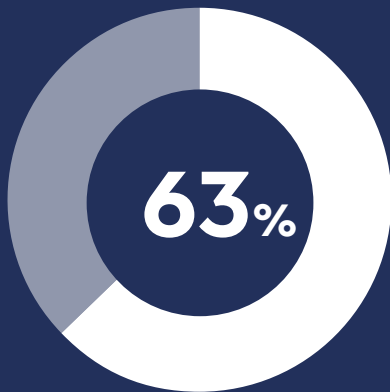


of consumers **skipped or delayed seeking care** as a result of finding inaccurate provider information, rising to 44% among Gen Z.

ACTION PLAN: PRIORITIZE A FOUNDATION OF ACCURATE PROVIDER, LOCATION, AND SERVICE DATA

The digital experience offered online to consumers is only as good as the data that powers it. In order to provide a truly exceptional consumer experience, organizations must first prioritize creating a single source of truth for their provider, location, and service information so that when patients are searching for care online, they find accurate information. This will not only help improve the consumer experience and prevent care gaps, it will also help to boost operational efficiency due to fewer manual updates.

Closing Gaps and Delivering Care: Overcoming Barriers to Access



of those who skipped or delayed care last year say they could not find an appointment.

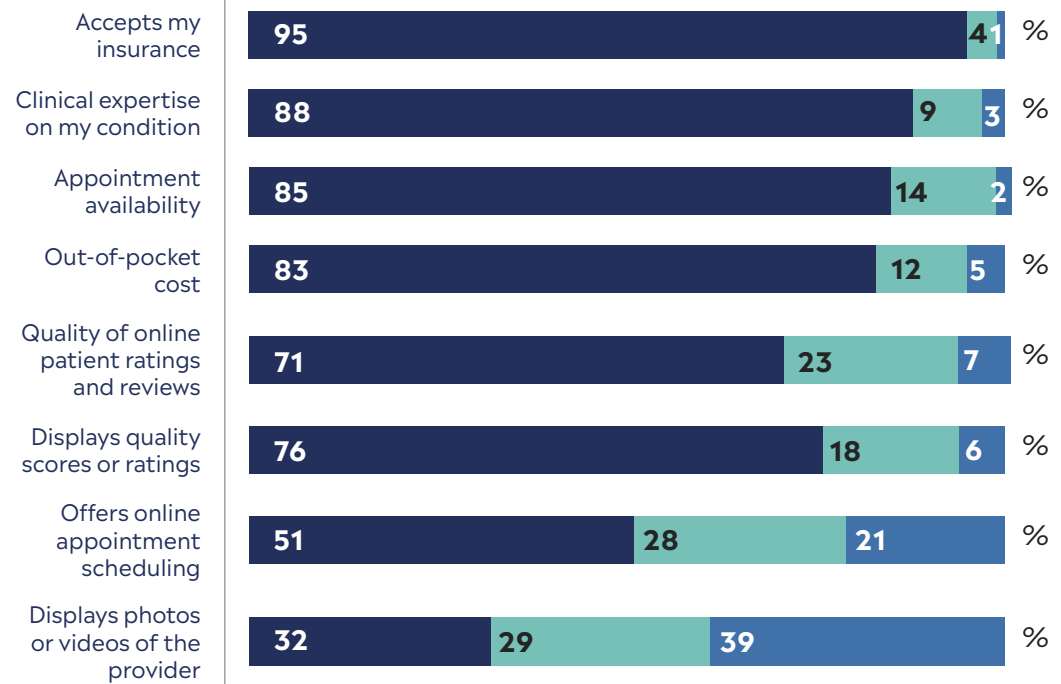


Consumers Have Distinct Preferences When Searching for Care

Consumers want a digital experience that will deliver the information they need to choose care that matches their preferences. While preferences vary by generation—for example, online scheduling and enhanced provider profiles (with photos, videos, and philosophies of care) are more important to younger generations—cost is a big factor for all consumers.

Factors Influencing Provider Selection

How important, if at all, are each of the following factors when selecting a new healthcare provider, service, or location?

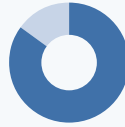


Extremely or very important Somewhat important Unsure or not important

Note: Due to rounding, some totals may add up to over 100%.



85%



of consumers say **appointment availability is very important** when selecting care.

61%



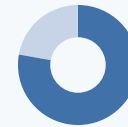
of Gen Z and 65% of Millennials say **online scheduling is very important**, compared to 53% of Gen X and 36% of Boomers.

28%



of those that attempted to, but did not schedule an appointment online in the last year, **noted that it was due to lack of availability** (date, time, location).

78%



of consumers wish they had **more control over their healthcare costs**, increasing to 87% among those who have skipped care in the past year.

ACTION PLAN: LEAN INTO CONSUMER PREFERENCE TO EVOLVE YOUR DIGITAL STRATEGY



As younger generations become bigger consumers of healthcare, make sure you understand and address their preferences, such as incorporating photos and videos to provider profiles, sharing reviews, and offering user-friendly online scheduling capabilities all in a single experience. If their preferences are ignored, it is possible they may begin to delay or skip visits—or turn to a competitor for care instead.

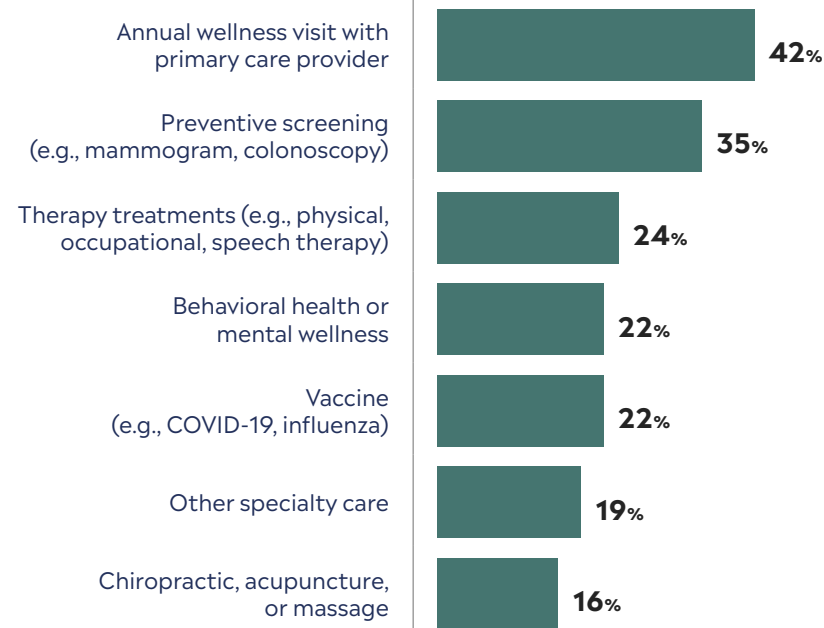


Consumers Are Skipping Wellness Visits and Preventative Care

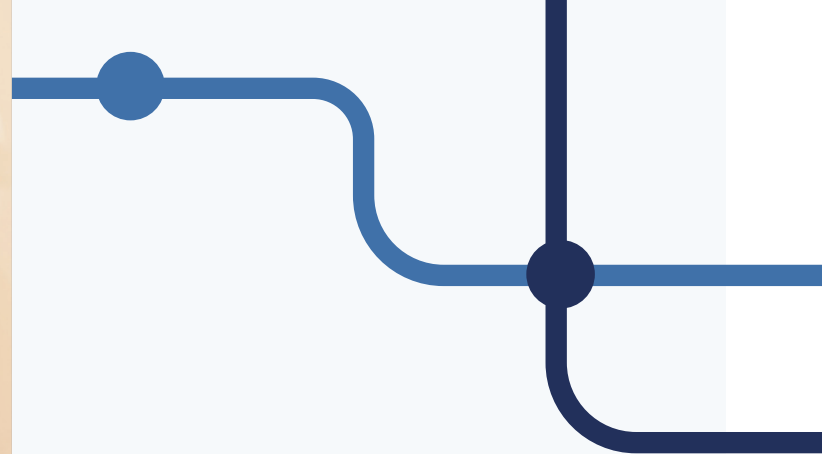
Almost half (47%) of consumers have skipped or delayed care in the past year, with annual wellness visits being the most commonly missed or delayed (42%). For Gen Xers, however, preventative screenings are most often missed or delayed.

Types of Care Consumers are Delaying or Skipping

What type(s) of medical care did you delay or skip? (Asked among those who have delayed and/or completely skipped receiving any kind of medical care in the past year)



n=468



Women **delay preventative screenings** such as mammograms or colonoscopies at higher rates (almost 10% more than males). It's often because they can't find an appointment date or time that works for them.

ACTION PLAN: ENABLE CONSUMERS TO TAKE CHARGE OF THEIR HEALTH



Prioritize initiatives aimed at promoting preventative care, such as targeted social media campaigns with a call to action encouraging patients to self schedule appointments, or direct mail campaigns that contain a QR code to allow people to easily book care online.

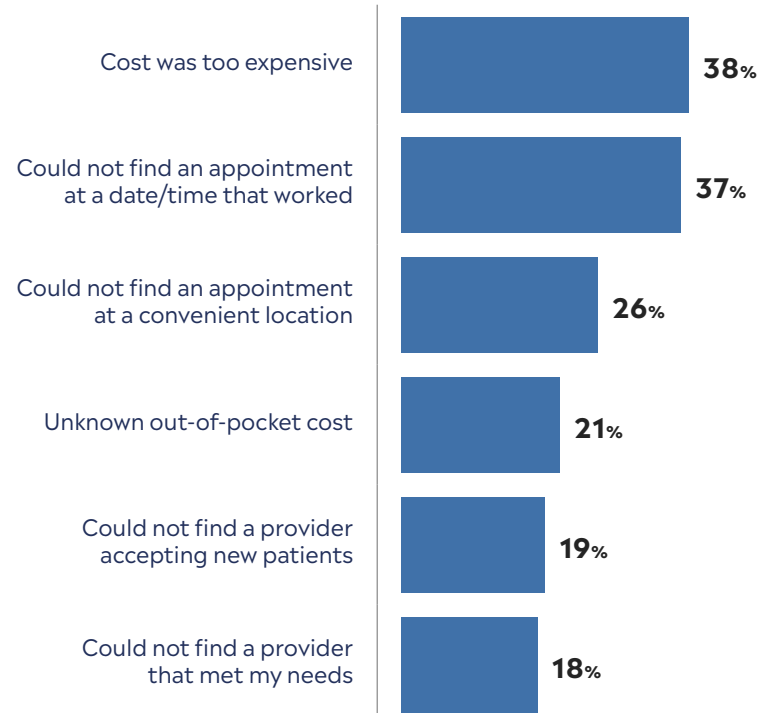


Barriers to Care Impact Health—and the Bottom Line as Well

Appointment availability, scheduling difficulties, and cost barriers are the main reasons consumers are skipping care. The impact of deferred care is evident, with missed opportunities for early detection and disease prevention. There's also a significant hit to immediate and long-term revenue for the healthcare organization.

Reasons Why Consumers Are Delaying or Skipping Care

Why did you delay or skip seeking medical care? (Asked among those who have delayed and/or completely skipped receiving any kind of medical care in the past year)



n=468



52%



of those who skipped or delayed care last year say they **could not find an appointment**, and 57% said they wanted to schedule an appointment online but were unable to do so.

48%

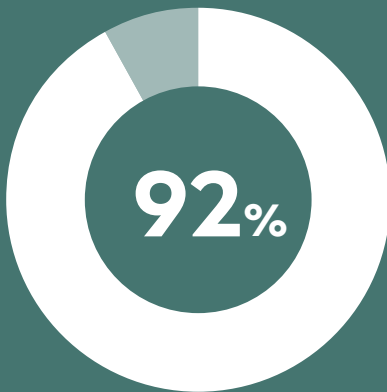


of those who skipped care in the past year would **switch healthcare providers for the ability to book appointments online**.

ACTION PLAN: SHOWCASE AVAILABLE APPOINTMENTS

With physician shortages at an all-time high, you need to make it easy for consumers to view available appointments and get the care they need. Display this information in the search experience and consider surfacing similar providers that may have earlier availability. Take a look at the way your organization routes patients on the website and consider directing lower acuity needs, such as a flu shot, to a nurse practitioner or physician's assistant to help spread the patient load and ensure that providers are practicing at the top of their license.

Making Every Dollar Count: Streamlining Operations and Enabling Self-Service



of consumers—and an even larger proportion of younger generations—are interested in scheduling appointments online.



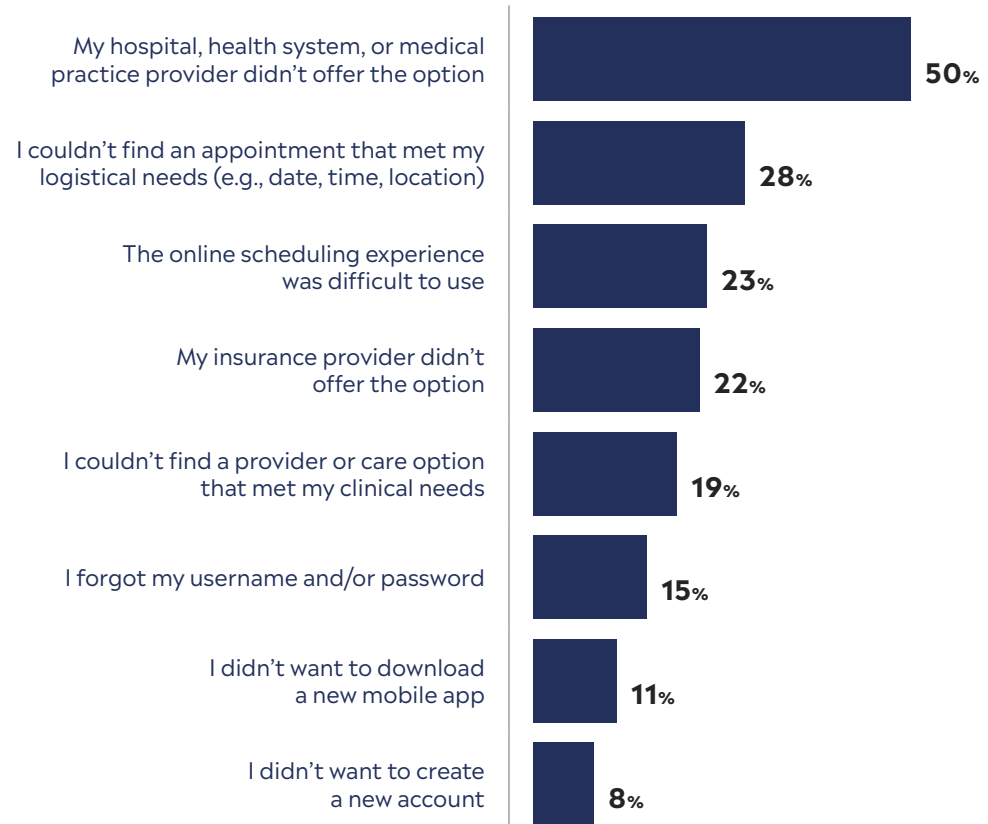
Online Scheduling: High Demand and Persistent Barriers

Online appointment scheduling is top of mind for consumers, with nearly all expressing interest and many willing to switch providers or forgo care altogether if the option isn't available to them. Even older generations, who previously preferred traditional methods such as phone calls, are now interested in the convenience of online interactions.

This highlights an opportunity to reduce the number of calls handled by over-burdened administrative staff by allowing patients to schedule their appointments themselves. However, barriers to online scheduling still persist, with **over 40% of consumers saying that they wanted to schedule online in the past year but were unable to do so.**

Factors That Are Preventing Consumers From Scheduling Appointments Online

Which of the following factors prevented you from using online scheduling to schedule a medical appointment in the past year? (Asked among those who wanted to schedule an appointment online in the past year but were unable to do so.)



n=410



35%



of consumers will **switch healthcare providers for the ability to book appointments online**, with Gen Z (62%) showing the highest inclination, followed by Millennials (55%).

ACTION PLAN: EXPAND ONLINE SCHEDULING AND MAKE THE PROCESS SEAMLESS

Ensure that as many providers, appointments, and services are available for scheduling online as possible. Showcase appointment availability in the care search experience, along with filters for criteria that matter most to consumers when selecting care, such as insurances accepted and languages spoken. Because many patients have difficulty with—or don't want to remember—a username and password, offer an unauthenticated experience outside the patient portal. This will help both new and existing patients more easily find the care they are looking for and get in the door.



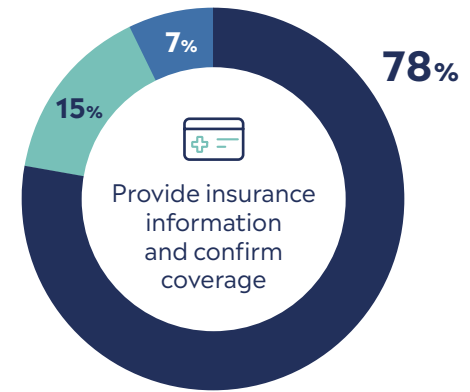
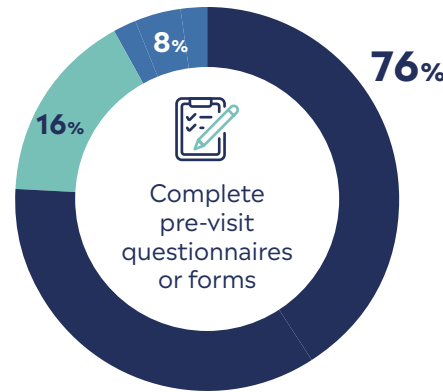
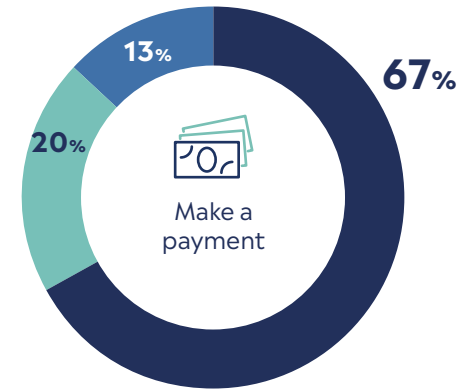
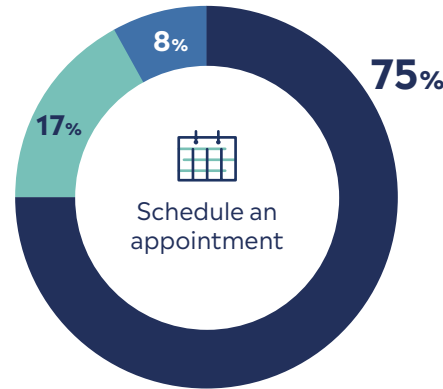
User-Friendly Self-Service Options Can Ease Consumer and Staff Frustration

Even when consumers are able to schedule online, they want more—they're looking for a user-friendly experience that lets them complete multiple tasks at the touch of a finger.

Providing these digital tools not only meets consumer expectations but also significantly reduces the amount of manual data entry for staff, can help shorten lines at the front desk, and can improve TOS collections and reduce outstanding balances.

Consumer Preferences for Completing Tasks Online

How interested are you in completing each of the following tasks online (as opposed to via phone or in person)?



Extremely or very interested | Somewhat interested | Not interested



of consumers are interested in **completing pre-visit forms and providing insurance information online.**



of consumers are interested in **making payments online.**

ACTION PLAN: REDUCE STAFF BURDEN BY IMPROVING THE DIGITAL PATIENT JOURNEY



Offer digital tools that help consumers throughout their entire care journey, from searching for care to scheduling an appointment, completing pre-visit forms, making a payment, and alerting the front desk of arrival. Ensure that your website—and any patient-facing mobile apps—are user-friendly, mobile-responsive, and accessible across various devices to cater to diverse consumer preferences and needs. Doing so allows staff members to focus on other, high-value tasks.

Taking Action: What Healthcare Organizations Can Do Today to Improve Access to Care



Kyruus Health's 2024 Care Access Benchmark Report reveals what consumers want and expect from healthcare organizations when it comes to their care access journey. The report highlights three key opportunities for healthcare organizations to better engage and connect consumers to the right care while streamlining operations:

- **Centralize your provider, service, and location data—and ensure that it's accurate across channels.** Use this data to not only give consumers a seamless experience on your website and with staff members but also power your third-party listings to help boost new patient acquisition in the channels consumers frequent most often.
- **Understand what consumers want when searching for and selecting care online.** Making a concerted effort to provide them with the information and functionality they are looking for, such as appointment availability and online scheduling, could be what prevents them from skipping or delaying care in the future.
- **Expand your digital self-service offerings.** Doing so will not only meet consumer preference but also streamline internal operations as well. The more providers and services you have available for online scheduling, the fewer phone calls your front desk or call center will receive, allowing staff to focus on helping the patients that truly need extra assistance.

For more insights on acquiring and engaging patients, preventing care gaps, and driving operational efficiencies—including white papers, guides, and case studies—visit the Kyruus Health Resource Library at KyruusHealth.com/resources.