

2023 Care Access Benchmark Report

FOR HEALTHCARE ORGANIZATIONS



KYRUUS®



Contents

The State of Care Access	3
About the Survey	4
When Searching for Care, Consumers Go Digital	5
Cost, Quality, and Convenience Drive Consumer Care Decisions	9
Care Access Begins Online but Traditional Channels Still Remain Popular...	13
Digital Self-Service Moves Beyond Consumer Preference to Consumer Expectation	17
Taking Action: What Healthcare Organizations Can Do Today	21

The State of Care Access



Satisfying Business Needs and Patient Expectations is a Significant Challenge for Healthcare Organizations

Healthcare organizations are facing an intense environment today, with increasing pressure to expand service footprints and outperform competitors. This paired with aggressive expansion, both organically and through acquisition, means a constant state of change.

As healthcare organizations grow, so do their challenges, including managing staff shortages and provider burnout, maintaining a rich network of providers with availability to meet patient demand, and building consumer awareness and preference for those providers. Further, patient-centric organizations continue to map digital strategies to meet growing consumer demand for convenient, user-friendly services that simplify access to care.

Consumer Expectations Continue to Run High

To manage growing consumer expectations and shrinking staff resources, forward-thinking healthcare organizations have adopted digital strategies, but our research shows that the experiences they provide are often falling short. It is not enough for organizations to simply offer self-service capabilities, they must do so in a way that offers a modern user experience that fosters trust and builds long-term connections to the organization.

Technology Can Help Bridge the Divide

As in previous Kyruus research, consumers voice their support of technology that makes the find care experience faster, easier, and more like what they experience when they book a dinner reservation, or purchase other consumer goods and services online.

About the Survey

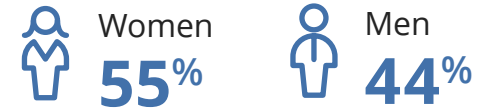
Findings in the 2023 Care Access Benchmark Report are based on a survey of 1,000 consumers, conducted by Wakefield Research in July 2023 on behalf of Kyruus.

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

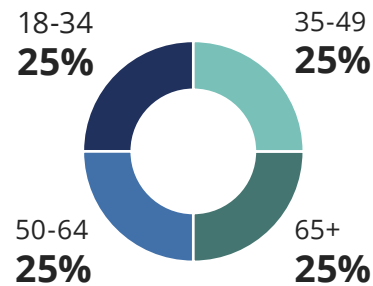
Size:
1,000 U.S. Residents

Date:
July 2023

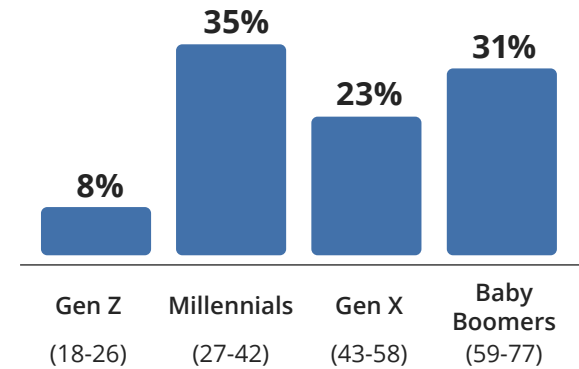
Gender:



Age:

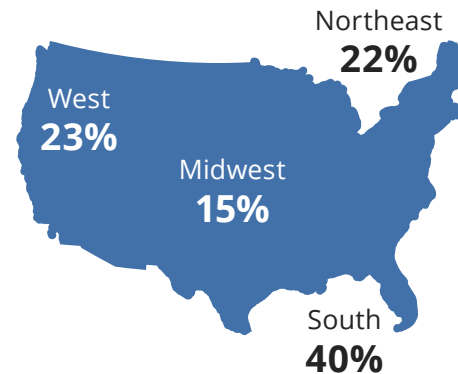


Generation:*

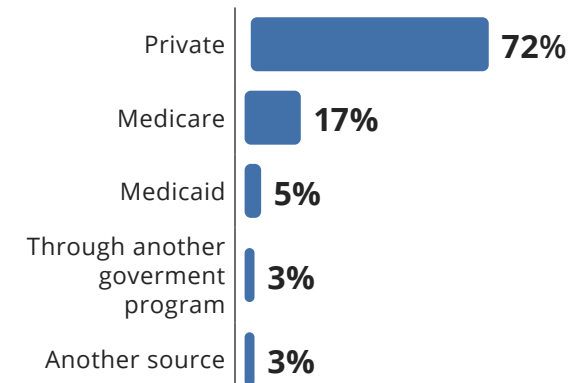


*NOTE: The remaining 3% is over age 77 and included as a subgroup in this survey.

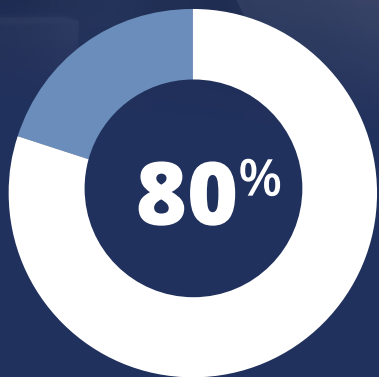
Location:



Type of health insurance:



When Searching for Care, Consumers Go Digital



of consumers used 2 or more resources when searching for care online.

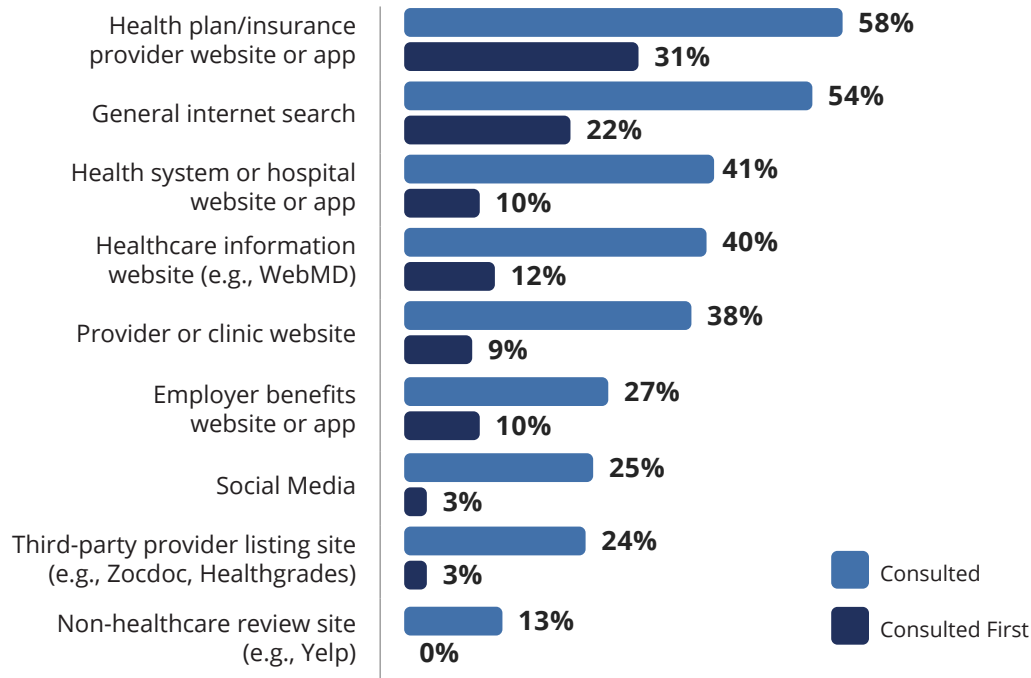


When Searching for Care, Consumers Go Digital

General internet searches, healthcare organization websites, and health plan websites continue to be the most popular settings for consumers to search for care online. Social media continues to gain traction as a viable digital channel for care searches. While consumers are frequenting the internet to find care, many are still engaging with traditional sources such as their healthcare providers, hospital staff, and family or friends.

CONSUMERS' TOP ONLINE RESOURCES FOR GATHERING HEALTHCARE PROVIDER, LOCATION, AND SERVICE 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=713

71%



of consumers **consulted the internet** during their most recent search for a new healthcare provider, service, or location.

40%



of **Millennials rely on social media** to research care options—notably higher than other generations.

52%



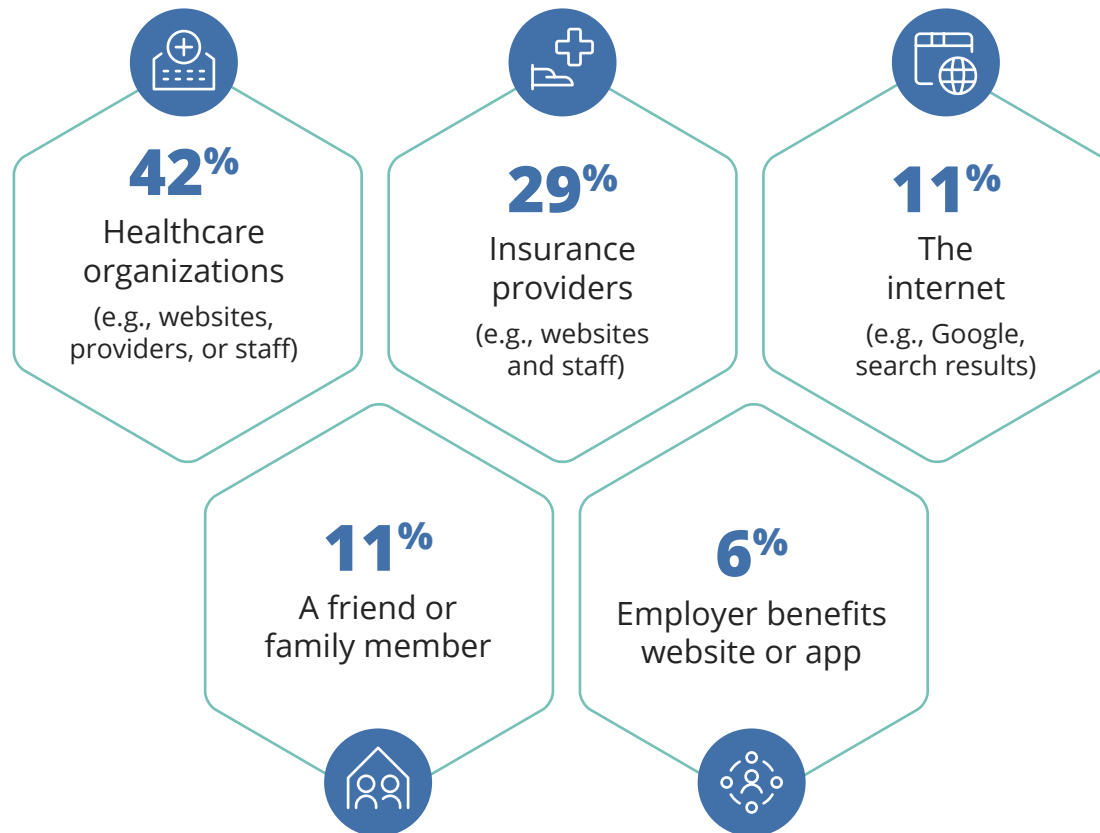
of consumers **go straight to their healthcare provider** (e.g., doctor or nurse practitioner) when searching for care.

Broadening the Search Online: Trust Matters

Consumer trust is paramount when it comes to interactions with healthcare organizations and health plan websites. When provider and availability information is inconsistent across digital channels, consumer trust in these entities is at risk.

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?



40%

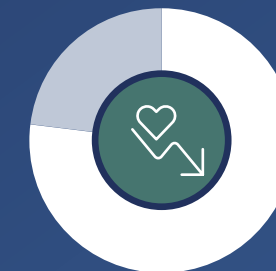
of consumers have **found inaccurate provider information** on their health plan's website.*

**Of those who used their health plan's transparency tools in the last 12 months.*



77%

of consumers say finding inaccurate provider information on their health plan's site would **impact their level of trust.**



Consumers Go Digital: Why It Matters to Healthcare Organizations



INSIGHT

Consistent with years past, consumers are researching care options online and the journey includes more than one stop along the way.

While consumers place a high degree of trust in health plan websites overall, that trust erodes when they find inaccurate provider and availability data on these sites.

Consumers still consult traditional sources such as providers or healthcare staff when searching for care. This emphasizes the need for organizations to expand their view of provider data management to a larger digital ecosystem, inclusive of internal resources.



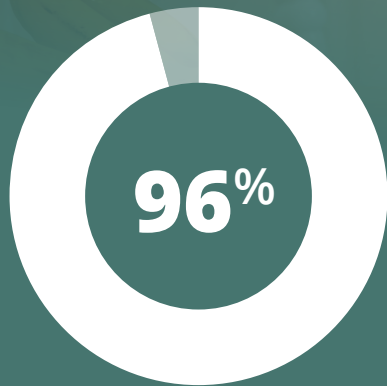
ACTION

Audit your digital presence and work to ensure provider data, appointment scheduling, and other key information is available in all the channels that consumers access when seeking care.

Actively seek partnerships with health plans to ensure your provider data and scheduling information is up-to-date. This creates greater consistency across touchpoints, so consumers can find and schedule care easily.

Identify all digital channels where provider data is surfaced, both for consumers and internal staff. Ensure data is accurate throughout your organization, so the exploration process is seamless for consumers whether they're looking online or elsewhere.

Cost, Quality, and Convenience Drive Consumer Care Decisions



of consumers consider some sort of cost information when selecting a new provider or service, underscoring the value they place on this information.

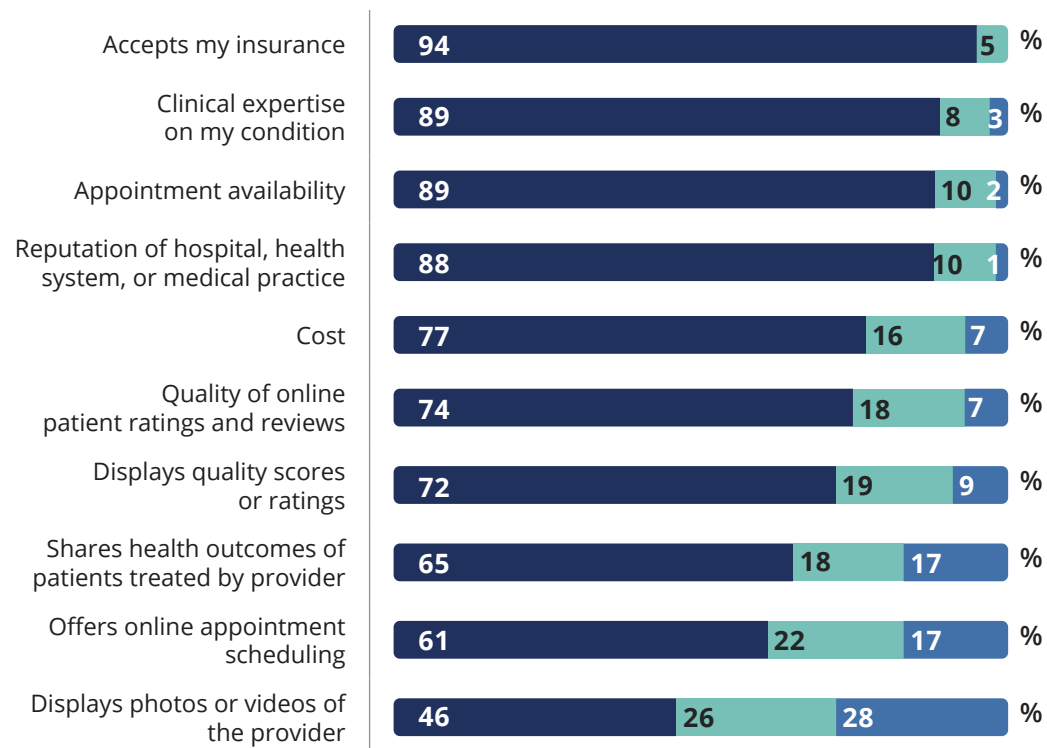


Cost, Quality, and Convenience Drive Consumer Care Decisions

Consumers consider a number of factors when choosing a provider, but the ability to secure an appointment in a timely manner with a provider that meets their clinical needs and accepts their insurance top the list.

MOST IMPORTANT CRITERIA FOR CONSUMERS WHEN SELECTING A NEW PROVIDER, SERVICE, OR LOCATION

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%.

KYRUUS.COM

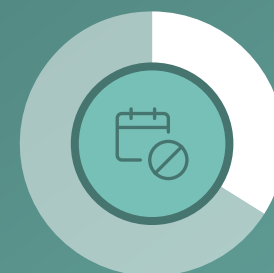
89%

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



34%

of consumers who did not schedule their last appointment online reported it was because the health system or medical group **did not have the availability they needed.**

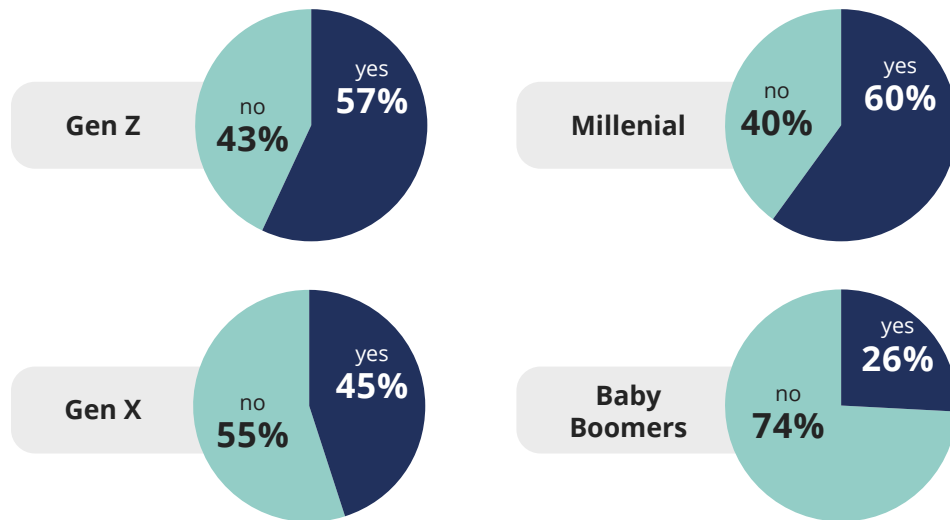


Unknown Costs Create Care Barriers for Younger Generations

Survey data reveals a concerning trend: younger generations are deferring care if they do not know the associated costs. Not surprisingly, budget-conscious younger consumers are the most likely to shop around to save money.

DELAYED CARE DUE TO LACK OF COST INFORMATION BY GENERATION

Have you ever avoided getting healthcare services because you didn't know what the costs would be?



64%

of Millennials **want estimated out-of-pocket costs** based on a specific plan and deductible status.



54%

of Millennials **want generic cost estimates** for services.



Care Decisions: Why It Matters to Healthcare Organizations



INSIGHT

Cost is a pivotal factor for consumers making care decisions, especially younger generations who are most likely to shop for care both for themselves, and as a caregiver.

Consumers are negatively impacted when they can't find the right type of provider or when appointment availability is low. This underscores the need for organizations to implement solutions that route patients to the appropriate care and ensure providers are practicing at the top of their license.

Consumer preference drives action. Some preferences, such as cost information and appointment availability are must-haves for consumers and their absence may cause an organization's providers to be bypassed.



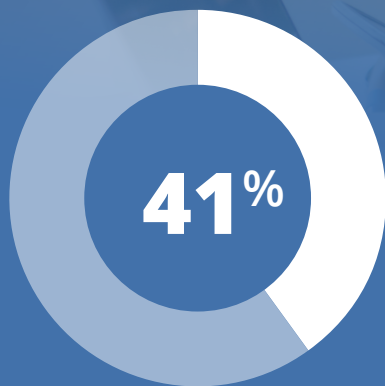
ACTION

Integrate reliable cost transparency tools into your digital experience to ensure consumers can access the cost details they need. Lack of cost information should never be a barrier to care for any patient.

Expand your current online scheduling capabilities to route patients to advanced practice providers (PAs, NPs) for lower acuity care (e.g., flu shots) rather than a primary care physician. This not only improves capacity for the system, but also opens up availability for patients seeking care.

Take stock of how you are addressing top consumer preferences to ensure you're placing emphasis on the right information that drives decision making forward. How many of these preferences is your organization accommodating?

Care Access Begins Online but Traditional Channels Still Remain Popular



of consumers prefer
to schedule new
patient appointments
via telephone.

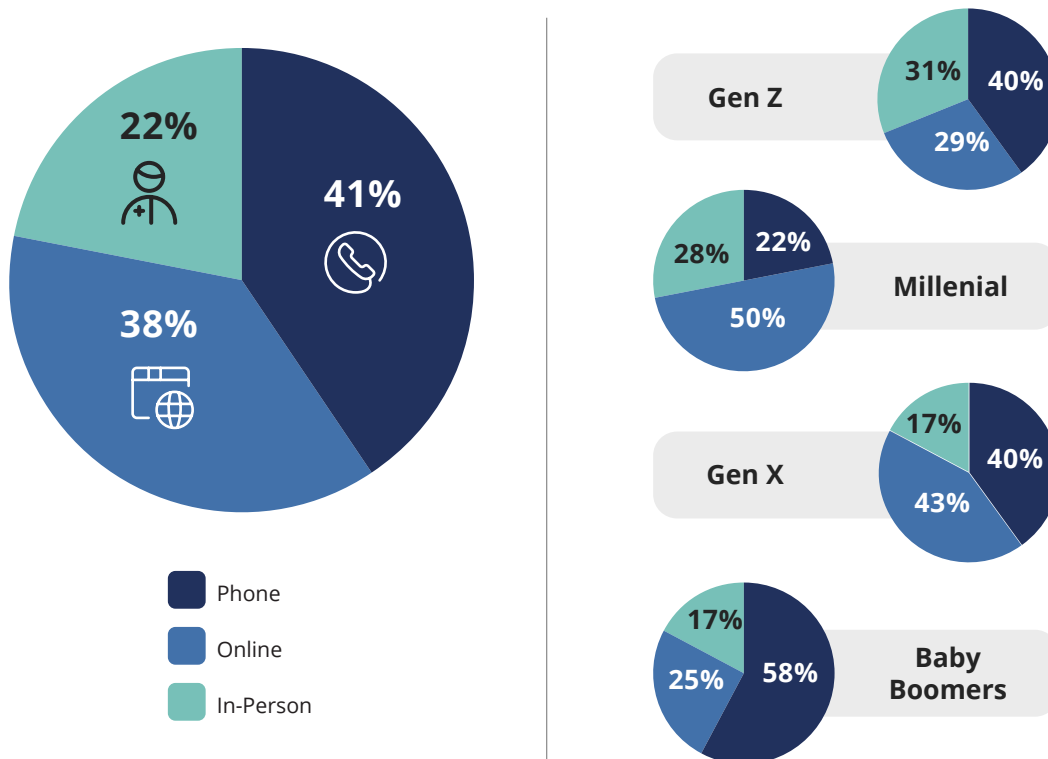


Care Access Begins Online but Traditional Channels Still Remain Popular

While many consumers clearly prefer the convenience of online scheduling, other options remain popular across generations. This indicates the need for broader access strategies that meet the full range of consumer needs and preferences.

CONSUMERS' PREFERRED MEANS OF SCHEDULING AN APPOINTMENT BY GENERATION

Given the following options, what is your most preferred means of scheduling an appointment with a new provider or service?



> 30%

of **Gen Z** prefer to schedule their next appointment before leaving the office.



~60%

of **Baby Boomers** prefer to schedule appointments via telephone.

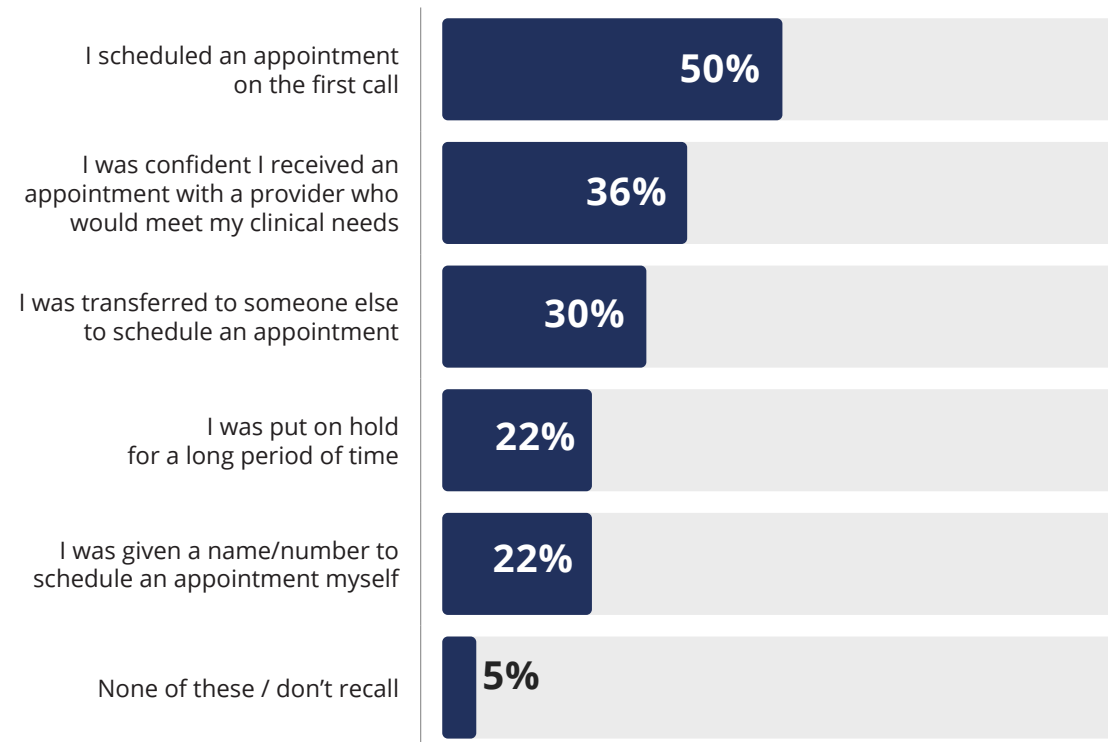


Phone Scheduling Often Yields Disappointing Results

For many consumers who rely on the phone to schedule appointments, the experience is often less than optimal and marked by long wait times and poor clinical matching.

OUTCOMES FOR CONSUMERS SEEKING CARE EXPERIENCES OVER THE PHONE

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



Only **36%**

of consumers who attempted to schedule care over the phone **were confident** that they were scheduled with a provider who could meet their clinical needs.



Traditional Channels: Why It Matters to Healthcare Organizations



INSIGHT

Consumers rank provider organizations as the most trusted resource. However, when consumers call to schedule an appointment, they lack confidence that the provider they will see meets their clinical needs, putting their trust at risk.



Consider the needs of older consumers by mapping an overall access strategy that integrates a range of scheduling solutions that are user-friendly and provide additional assistance for those who need it, regardless of age.



High call volumes can drain call center and front desk staff, leading to long wait times for consumers. While many calls are routine and low-touch, some consumers truly need extra assistance from an agent or staff member.



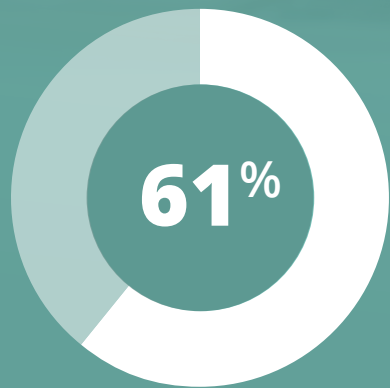
ACTION

Optimize the phone scheduling experience by leveraging accurate provider information and intuitive matching across access points. This will improve consumer experiences and help maintain the integrity of providers' schedules by avoiding scheduling inappropriate patients.

Ensure scheduling solutions encompass all channels to meet consumer preferences. Arming call center agents and front desk staff with the tools they need to schedule appropriate care creates a positive, efficient access experience for patients.

Offer online scheduling to complement traditional access channels, enabling call center and front desk staff to provide meaningful assistance to those who need it for more complex cases.

Digital Self-Service Moves Beyond Consumer Preference to Consumer Expectation



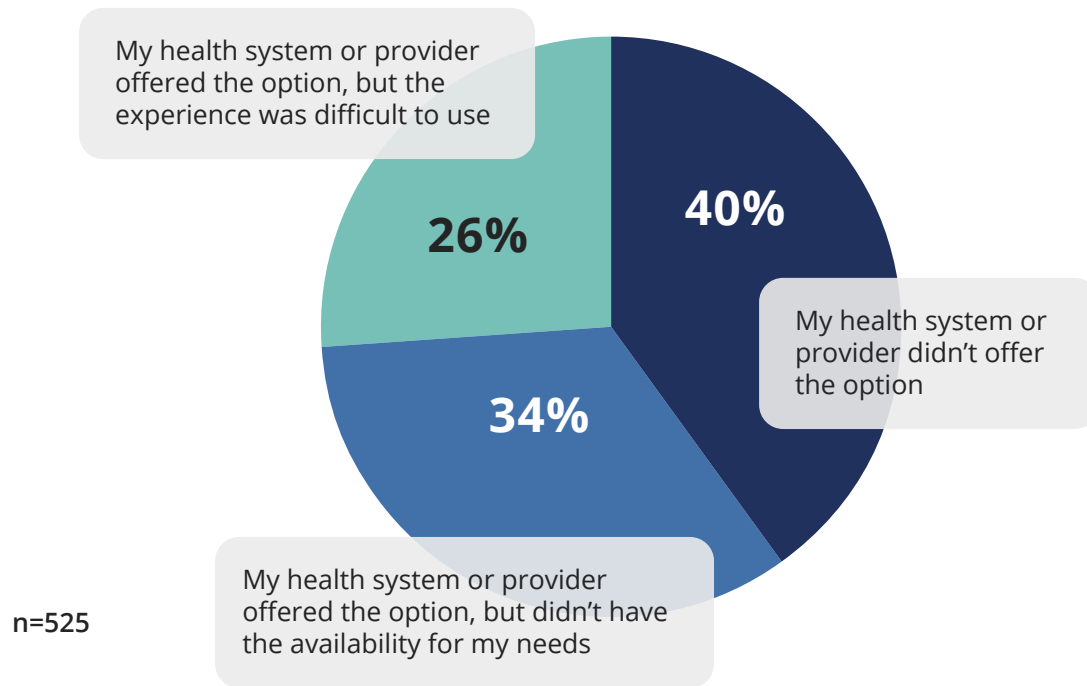
61% of consumers say the availability of online appointment scheduling is extremely or very important when choosing a new provider, service, or location for care.

Consumer Preference for Online Scheduling Impacts Care Selection

Online scheduling is the preferred method for scheduling an appointment for Millennial and Gen X populations. For consumers drawn to online scheduling, the commitment runs deep. In fact, the availability of online scheduling may be a deciding factor that determines if the consumer chooses a provider or a competitor

REASONS WHY CONSUMERS DID NOT SCHEDULE THEIR LAST APPOINTMENTS ONLINE

What has prevented you from using online scheduling to schedule your most recent medical appointments?



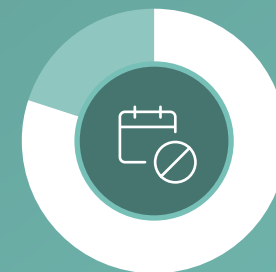
75%

of Millennials scheduled their most recent new provider or service appointment online—**acting on their specified preference for booking care.**



~80%

of consumers would schedule care from a health plan website **if the option was available.**

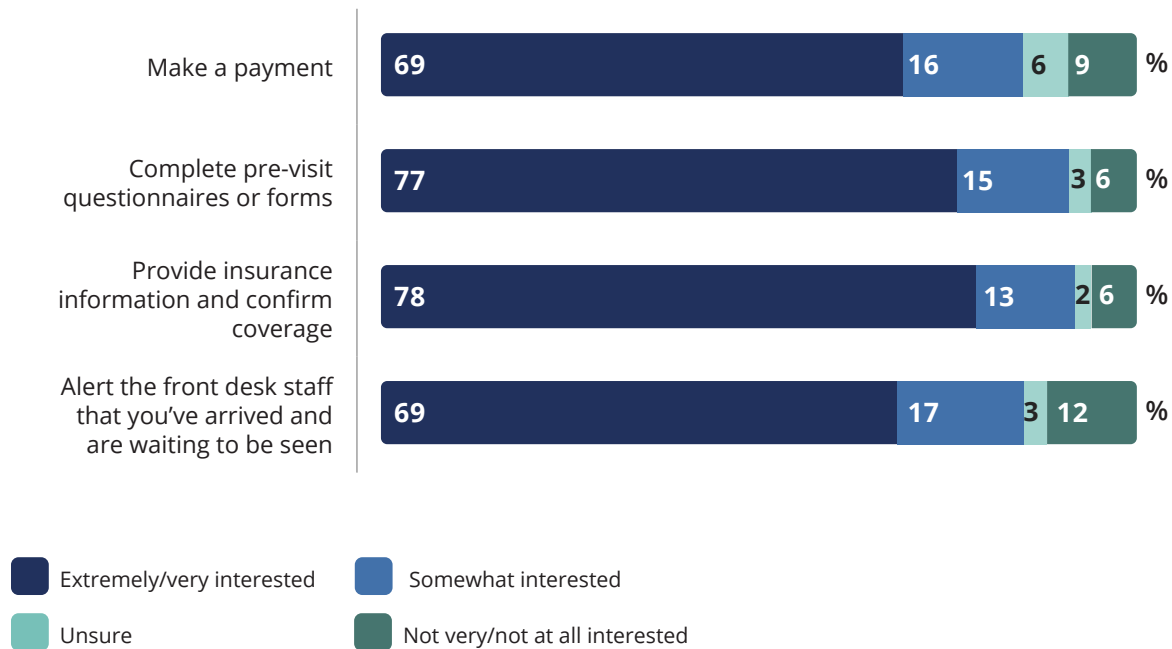


Online Scheduling is Just the Tip of the Iceberg for Self-Service Access

Consumer preference for digital self service doesn't end with online scheduling. Many are looking for expanded digital capabilities that enable them to complete more tasks online, at their convenience, including completing intake forms prior to an appointment, making payments, and even checking in for appointments.

CONSUMER INTEREST IN COMPLETING CERTAIN HEALTHCARE RELATED TASKS ONLINE

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



77%

of consumers are extremely or very interested in **completing pre-visit questionnaires** online.



Digital Self-Service: Why It Matters to Healthcare Organizations



INSIGHT

Millennials' consumption of healthcare services will continue to increase, whether for themselves or to meet caregiving obligations for elderly parents and dependent children.



Primed by their online interactions with other industries, consumers are looking for the same end-to-end digital self-service experience from healthcare organizations.



While the demand for digital self-service is clearly evident, it is important to recognize a critical subcontext: ease of use. Offering self-service options that are complex does more harm than good.



ACTION

Offer an intuitive online scheduling experience to meet consumer preference for convenience, especially among Millennials who have a decided preference for digital engagement.

Build a comprehensive self-service strategy that goes beyond a single transactional experience for consumers. Online provider search-and-schedule solutions are an important foundational step, not a final destination.

Empower consumers to select the best care choice with accurate, robust data and easy-to-navigate digital experiences. Make user experience testing a key component to ensure consumers can easily interact with your digital build.

Taking Action: What Healthcare Organizations Can Do Today



Kyruus' 2023 Care Access Benchmark Report provides broad insight into what consumers want, need, and expect today when they interact with healthcare organizations to search, select, and access care. Based on the key findings of this report, here are three steps healthcare organizations can take today to help ensure they are attracting, growing, and retaining their consumer base:

- **Create a comprehensive digital access strategy** that allows you to manage your digital footprint across the entire ecosystem. This ensures that your provider, location, and service data is accurate wherever consumers are searching for care.
- **Optimize the scheduling experience** across your organization. Scheduling an appointment should be easy and consistent, whether consumers engage online or contact a call center or front desk staff member. Laying the groundwork with accurate, up-to-date provider and availability information is the key to uniform scheduling experiences at every access point.
- **Broaden your digital roadmap** to encompass more than just online scheduling. Consumers are accustomed to being able to complete many types of tasks online—and their expectations for healthcare extend beyond online scheduling. Organizations have an opportunity to fully engage consumers by integrating digital self-service features that enable them to verify insurance, make payments, and provide their personal health information, at their convenience.

For more insights on patient access and digital self-service—including white papers, case studies, and more—visit the Kyruus Resource Library at kyruus.com/resources.