Patient access and engagement in the age of omnichannel

Annual Optum consumer survey on consumer preferences when accessing care

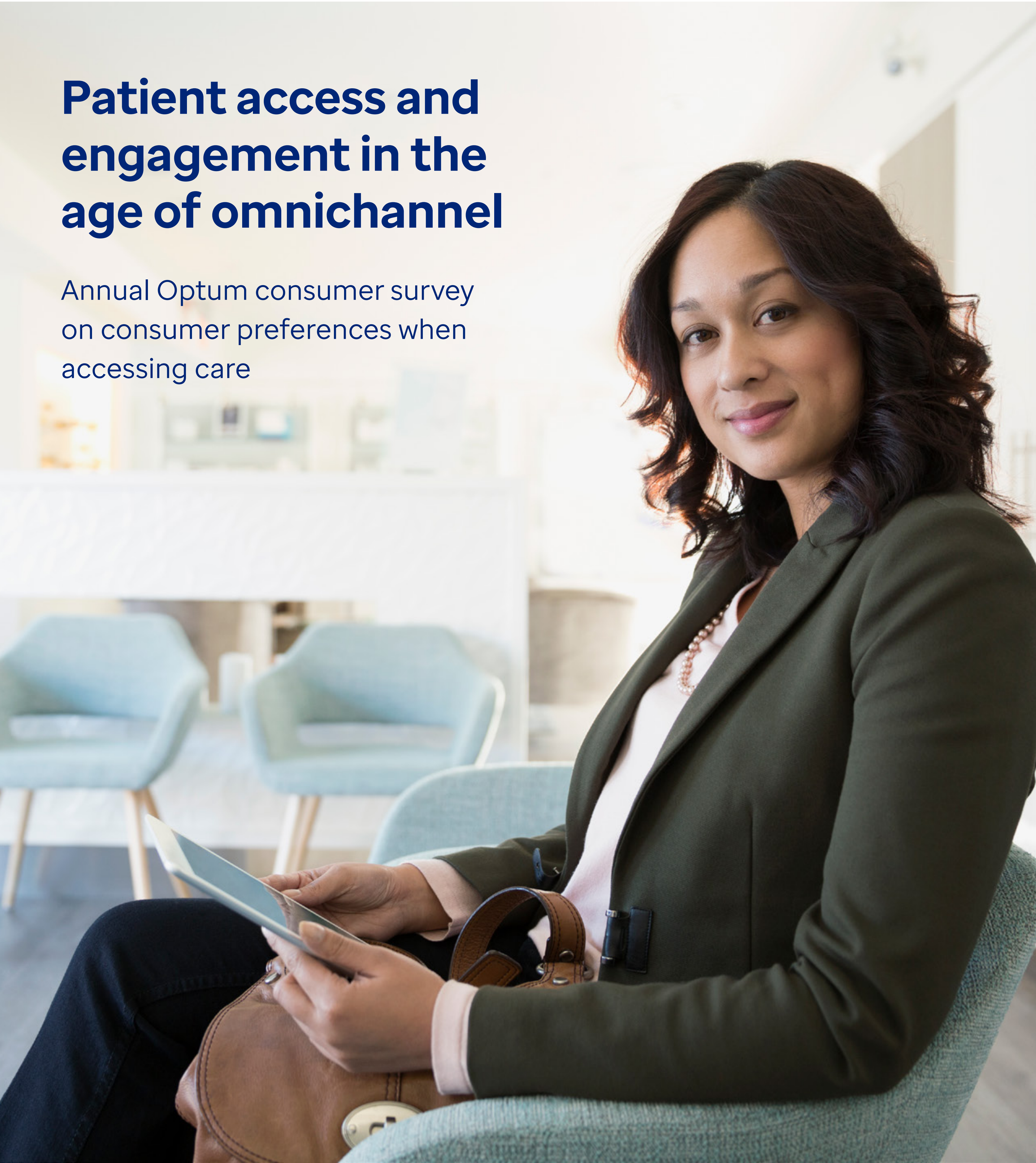


Table of contents

Optum

Executive summary

The health care industry is entering a new era of consumerism defined by convenience, choice and control. Consumers are no longer limited by pandemic rules. They now want to enjoy the ease and speed of digital retail, while still seeing their own provider in their preferred setting.

No single door opens wide enough, however, to fully serve a diverse population facing barriers to care. As a result, consumers use a variety of digital and traditional channels to explore care options and engage with their providers. Health systems and health plans can meet these expectations by using omnichannel strategies that empower consumers across the spectrum of diversity to access care through pathways they trust.

The following research findings are from an annual consumer survey, conducted on behalf of Optum by Toluna Start. We commissioned this study to better understand patients' experiences, frustrations and expectations when accessing care. Our survey also measured preferences when engaging with health plans and health care providers.

Survey details

Fielded from **June 2–7, 2023**

1,201

Consumers age 25+ participated in the online survey

Participants had at least **one health care visit in the past year**

Accessing care

Convenience and cost factors are important to all, but satisfaction lags for some consumer groups

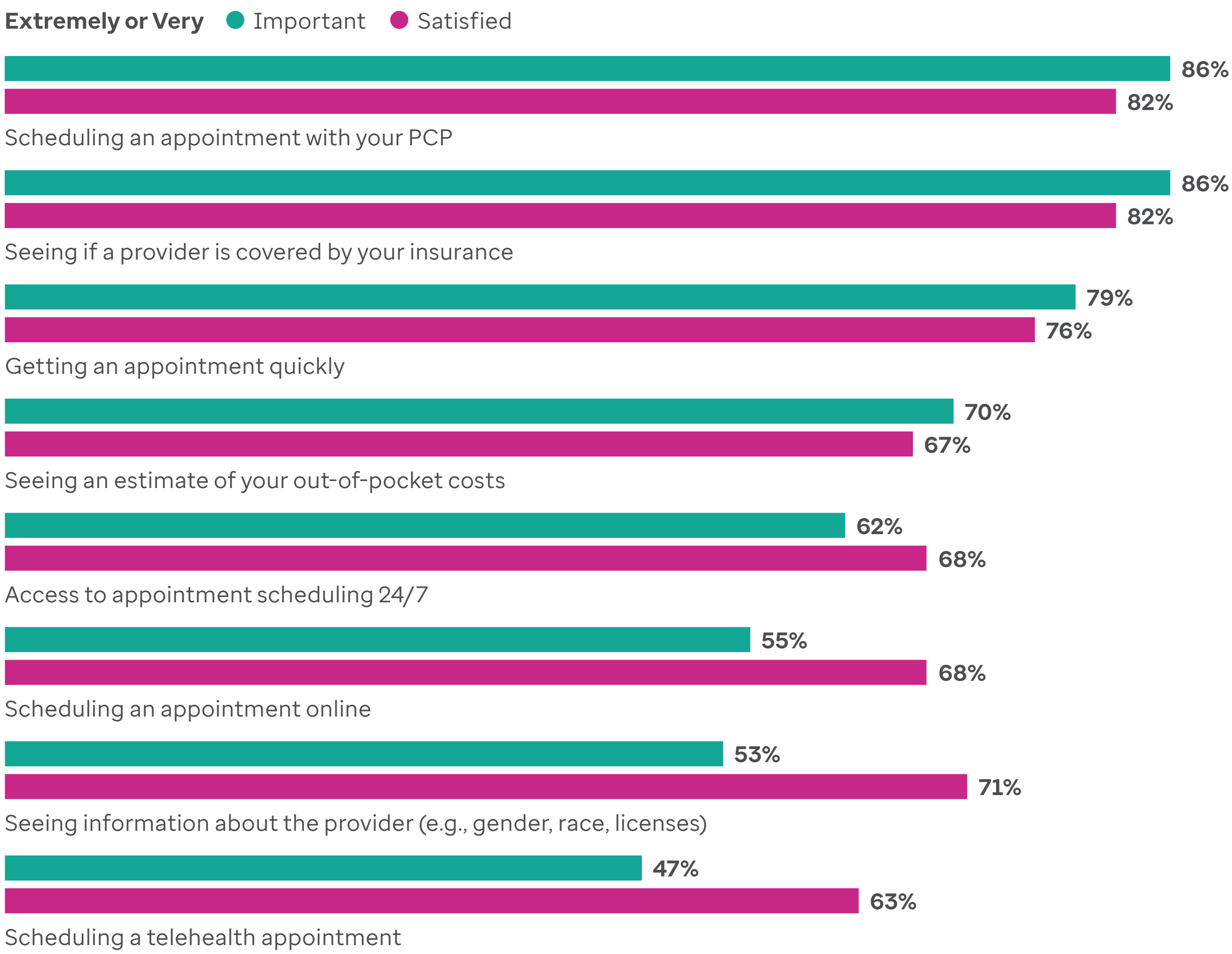
When accessing care, consumers want to quickly see their own primary care provider (PCP), while understanding insurance coverage and costs upfront. These factors are table stakes for consumers on their care journey.

Understanding insurance coverage is especially valuable for Black and Hispanic/Latino consumers, who are more likely to face cost-related barriers to patient access.[1] Roughly 8 in 10 say that seeing if a provider is covered by their insurance is the most important aspect of scheduling care. But lower satisfaction indicates their needs are not always being met.

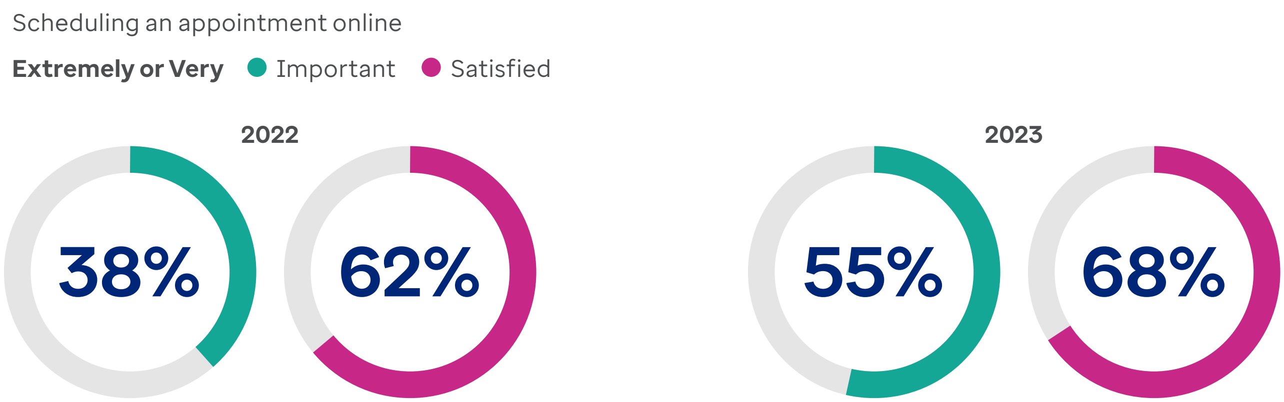
Over
80%
of consumers identifying as Black and/or Hispanic/Latino say that **seeing if a provider is covered by their insurance** is the most important aspect of scheduling care.

For the digital aspects of scheduling, our survey found a narrowing gap between expectations and satisfaction. Consumers rating online appointment scheduling as "extremely" or "very" important increased by 17% since last year's survey, while satisfaction increased by 6%. Consumer preferences may be shifting in favor of technology as they use online scheduling more often and feel satisfied with the experience.

Consumer expectations and satisfaction when scheduling care

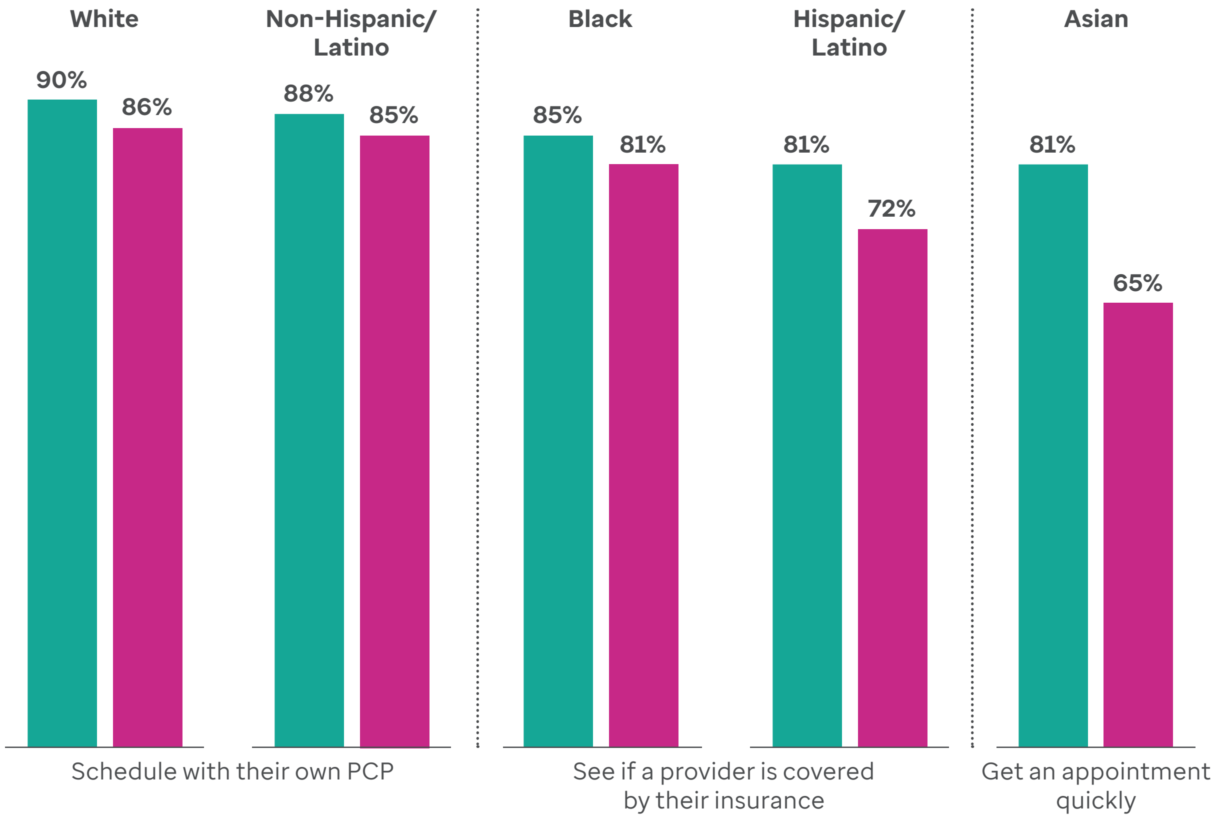


More consumers consider digital scheduling important



The #1 most important scheduling attribute vs. satisfaction by race, ethnicity

Extremely or Very ● Important ● Satisfied

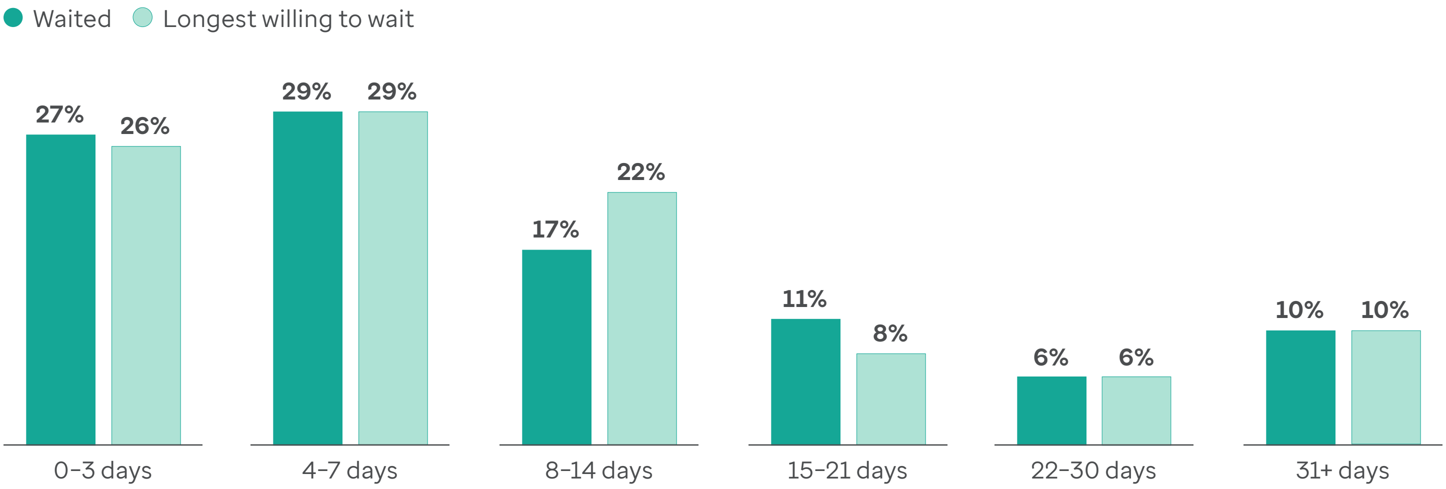


Long wait times erode consumer patience

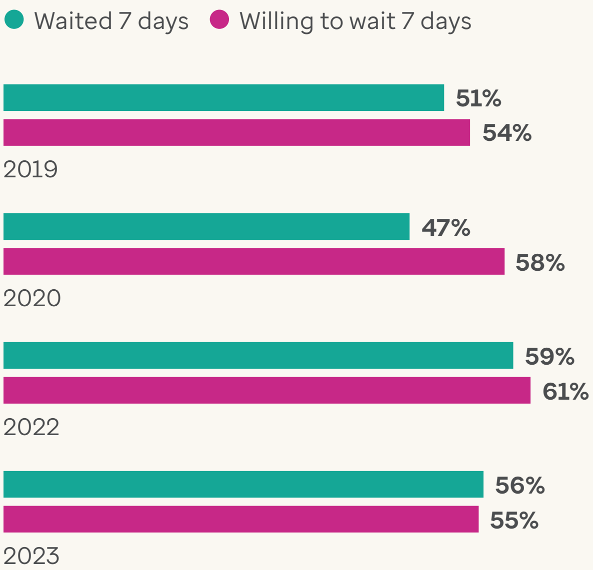
Waiting is a common pain point in health care. The average medical appointment wait time in 2022 was 26 days according to Merrit Hawkins.[2] Survey respondents shared a greater frustration with wait times compared to previous years – 55% prefer to wait no more than a week for care, a 6% decline from 2022. Meanwhile, the number of consumers who waited 7 days between scheduling and attending their appointments saw little change. Impatience is growing, even if wait times are not.

How long would you wait to see a provider after scheduling an appointment? How long are you willing to wait?

Select number of days



Consumers who actually waited a week max vs. their willingness to wait by year



A good reputation and online services can win new patients

Consumers consistently say they'll switch to a more convenient provider based on location and business hours. But reputation is also a growing factor in patient choice, becoming the second most popular reason consumers will switch providers. Similar to digital retail experiences, consumers check reviews and ratings to explore their care options. A survey by Reputation found that 65% of consumers have selected one health care provider over another based on online ratings.[3]

Digital health services are becoming another key differentiator for patients. About 1 in 5 consumers say they'd switch providers for access to online services, a 2x increase since last year.

About
20%
of consumers say they'd switch providers for **access to online services.**

What would influence your decision to switch providers?

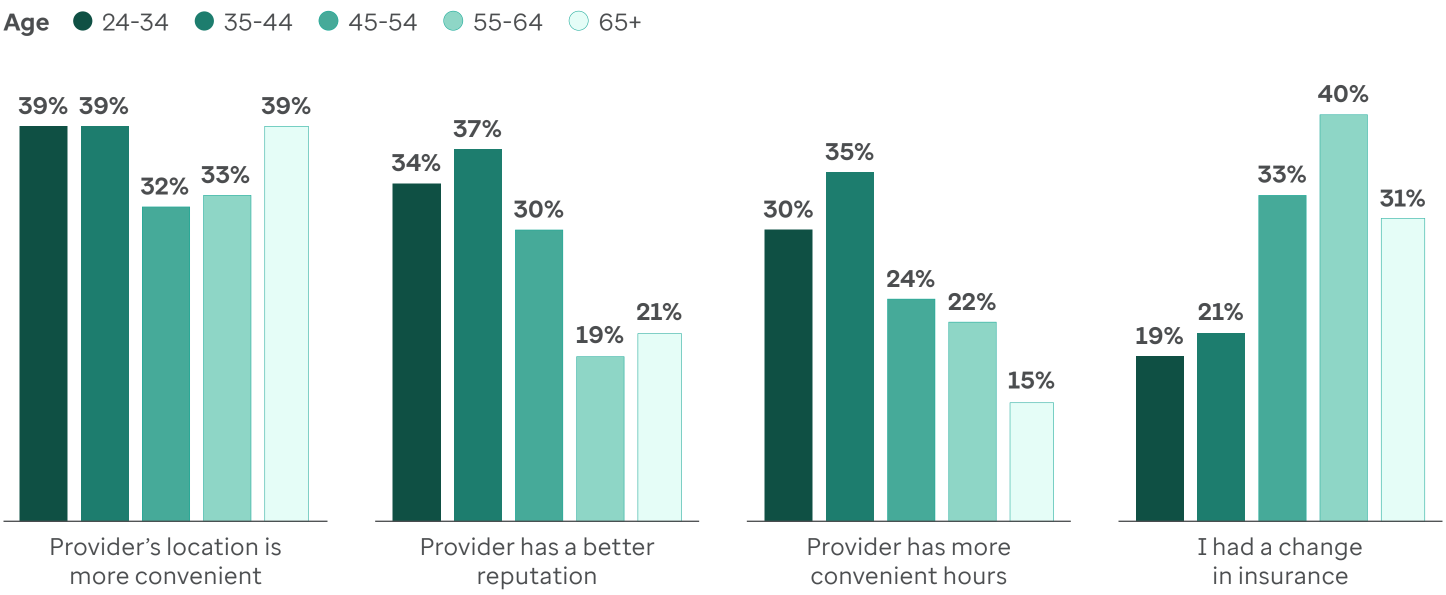
Select up to 3

	2022	2023	YOY
Provider's location is more convenient	42%	37%	⌄
Provider has a better reputation	19%	29%	^
If I had a change in insurance	20%	27%	^
Provider has more convenient hours	25%	26%	^
Provider is available for both in-person and telehealth visits	31%	23%	⌄
Provider has near-term availability when I need care	26%	22%	⌄
Provider offers online services (scheduling, bill pay, digital check-in, etc.)	12%	21%	^

Broken down by age, younger consumers are the most swayed by convenience and reputation. Older adults are more likely to switch providers due to changes in insurance.

Factors that influence consumers to switch providers, by age group

Select up to 3

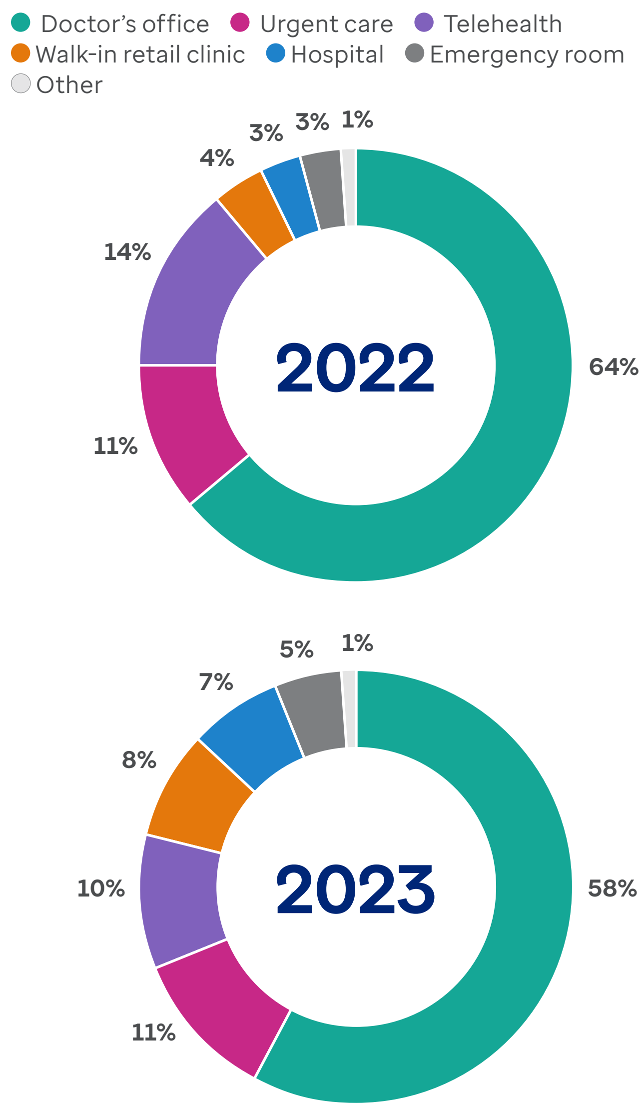


The doctor's office remains the most preferred care setting

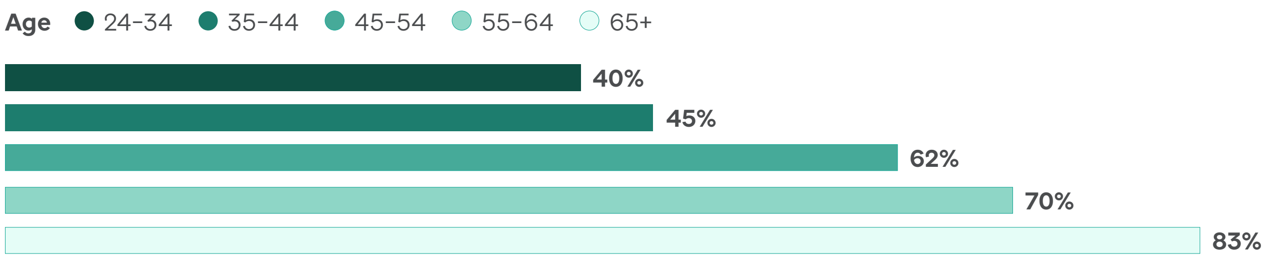
The overwhelming preference for the doctor's office as a care setting shows that consumers are fully embracing in-person care after years of pandemic disruption. This trend is the same across all demographic groups, with the strongest preference for the doctor's office coming from older adults, white and non-Hispanic/Latino consumers. Other settings such as walk-in retail clinics saw small gains in preference, while telehealth slightly declined.

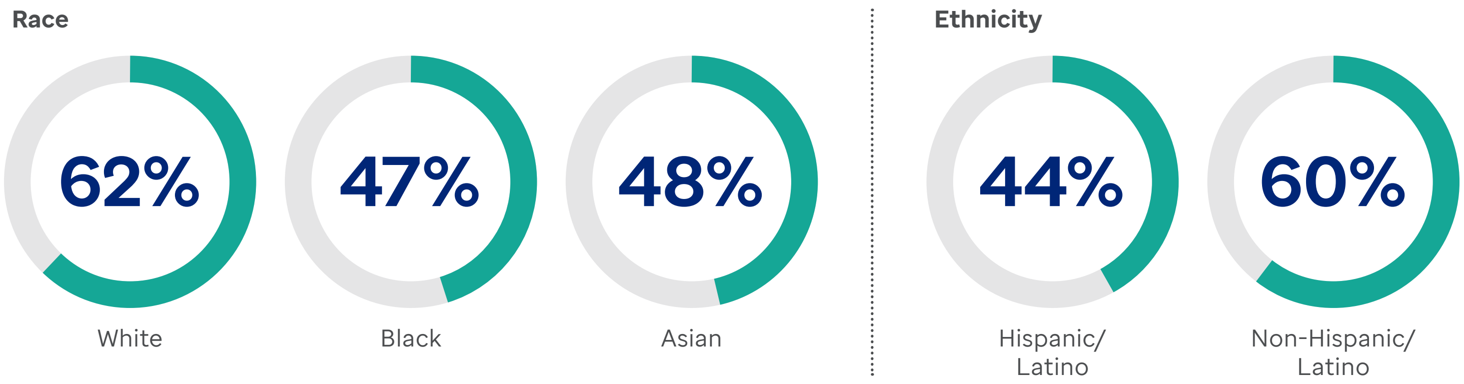
Where do you prefer to get care for non-life-threatening needs?

Select one



Consumers selecting the doctor's office as their preferred care setting





Urgent care centers are booming as the top alternative care option

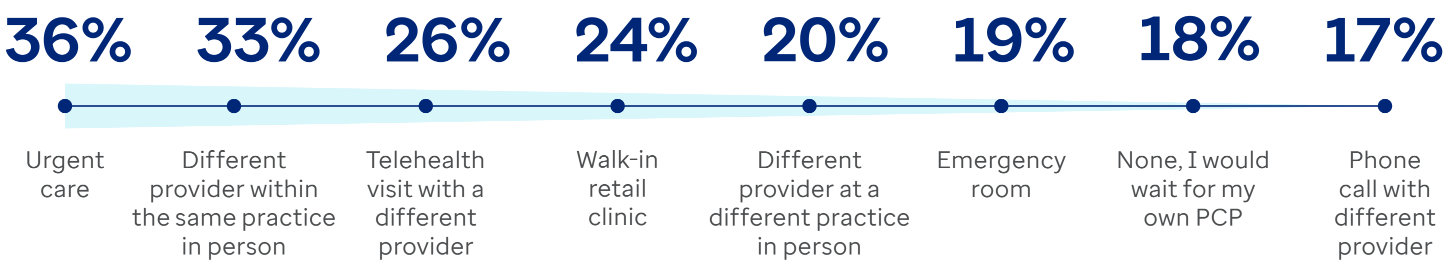
The lower availability of primary care is pushing consumers to explore alternative care options.[4] When their own PCP isn't available for a routine visit, one-third of consumers state they will visit urgent care or see a different PCP in person, within the same practice. Preference for urgent care increases sharply among Black consumers (47%) and consumers ages 25–34 (45%). Hispanic/Latino and Asian consumers also favor urgent care.

But a steady 1 in 5 of consumers would rather wait for their PCP to be available than seek care elsewhere. This trend is especially strong among adults 65+, of whom a third will wait to see their own PCP.

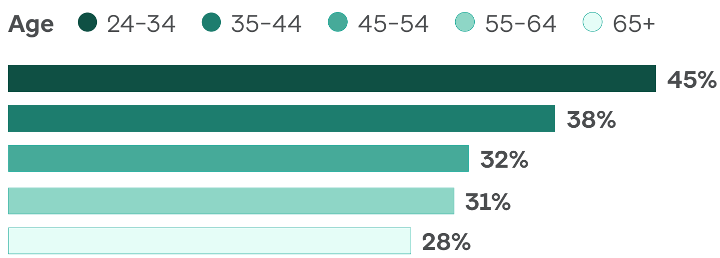
Nearly
20%
of consumers would rather wait for their PCP to be available than seek care elsewhere.

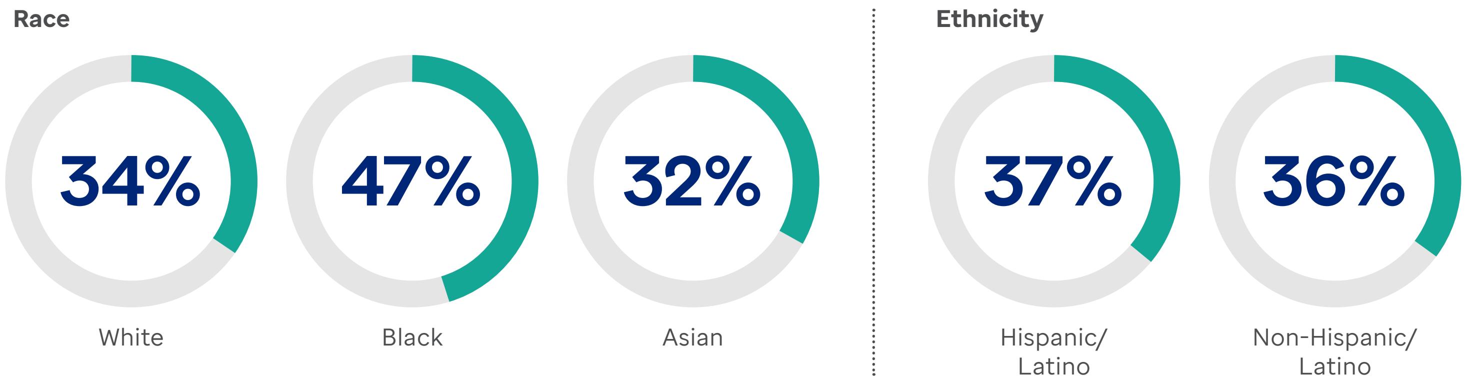
Where do you go for routine care when your preferred provider isn't available?

Select all that apply

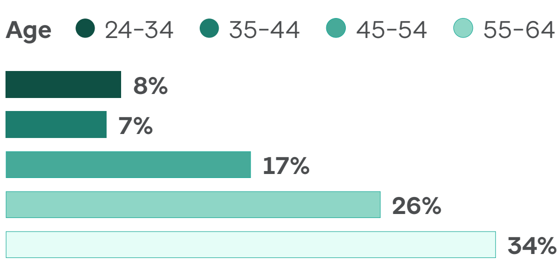


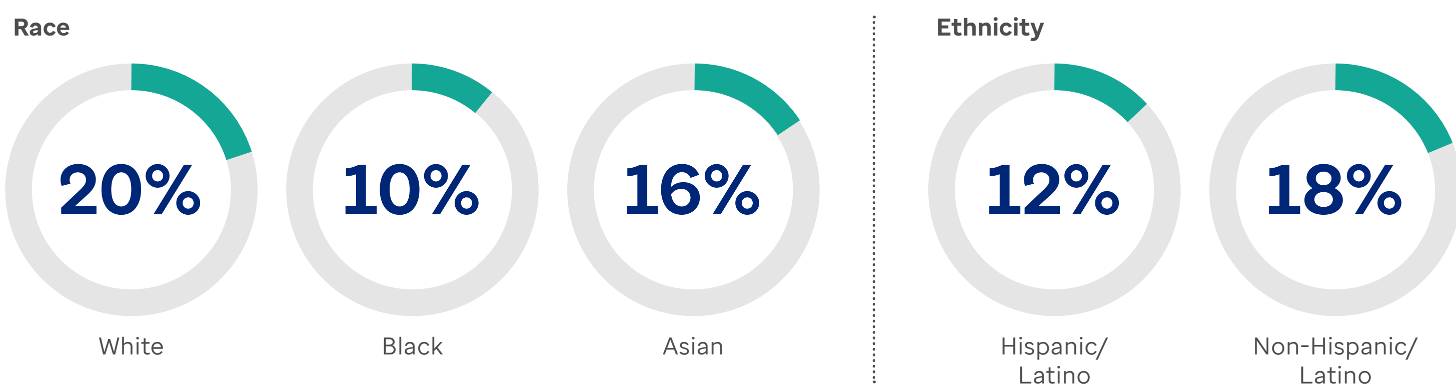
Consumers selecting urgent care as an alternative care option





Consumers who would wait to see their own PCP





Seeking care

Health plan websites and doctor recommendations tie for top choice

Consumers explore both digital and traditional pathways when looking for a new doctor. Forty percent of consumers use their health plan's website or doctor's recommendations to search for new providers.

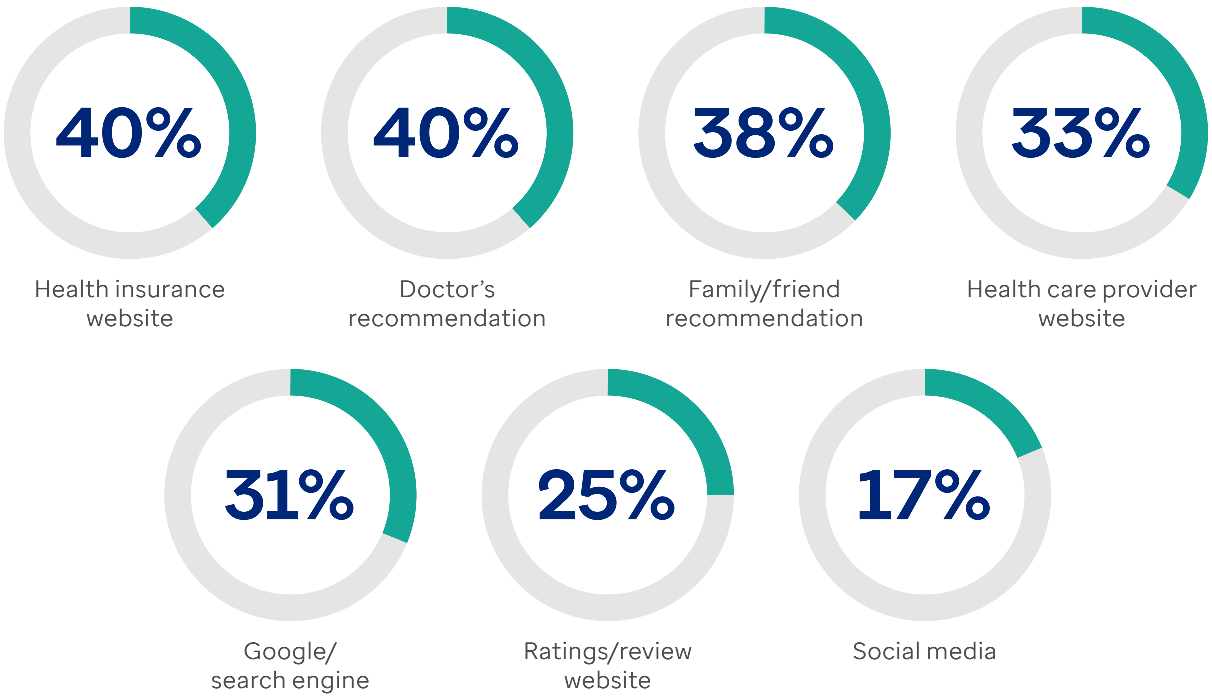
As reputation becomes an important factor in consumer choice, ratings websites for health care providers are also growing in popularity. A quarter of consumers will visit a ratings website to find a new provider.

40%
of consumers use their health plan's website or doctor's recommendations to search for new providers.

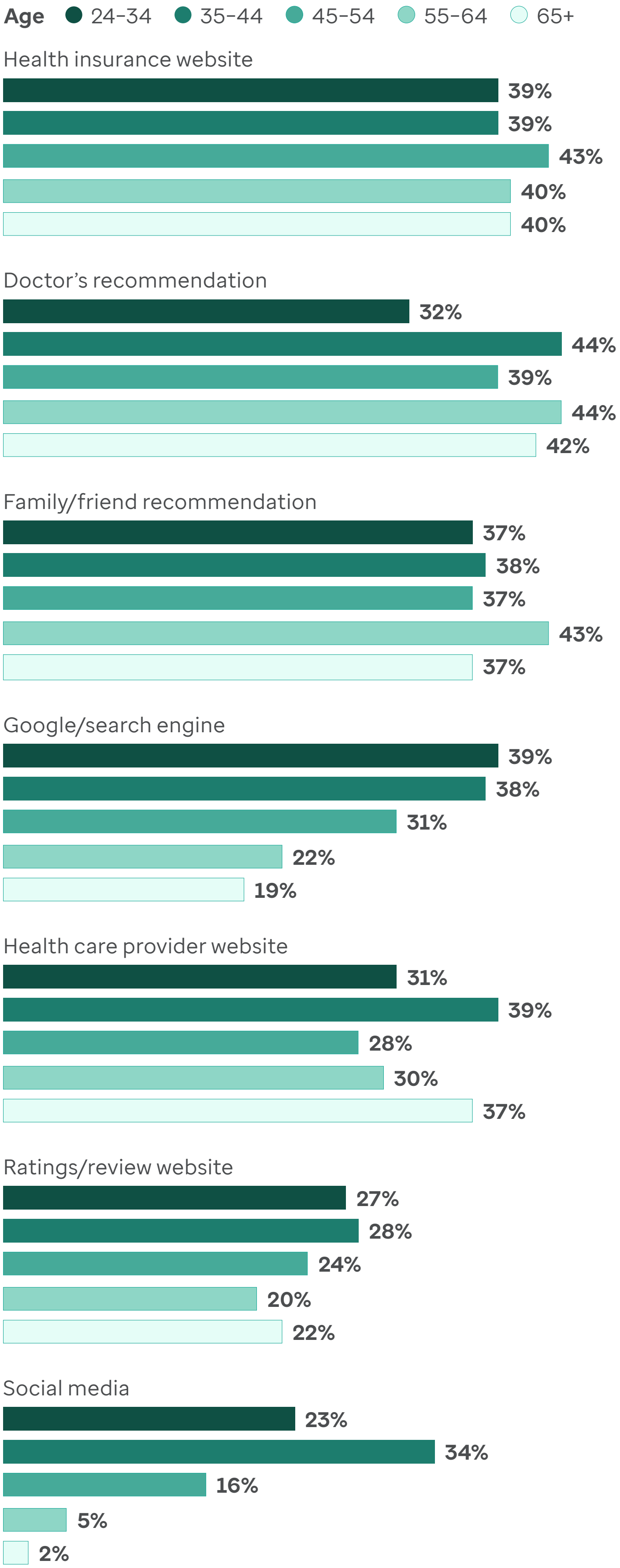
Consumers under age 45 are more likely to rely on digital resources like health plan and rating websites to find a new health care provider. Older consumers most often leverage existing relationships. Black, Asian and Hispanic/Latino consumers also prefer using websites and search engines to find new providers, while white and non-Hispanic/Latino consumers seek recommendations.

How do you search for new health care providers?

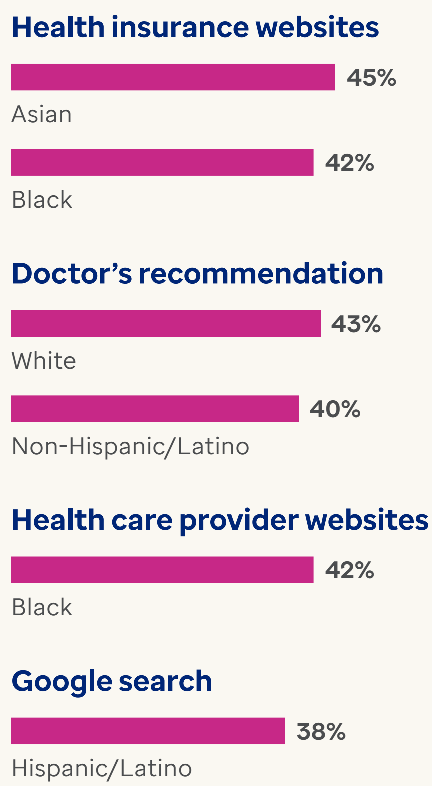
Select all that apply



Provider search trends by age



Top channels for finding new providers by race, ethnicity



Use of digital-first access continues to grow

Experience is catching up with consumer preferences for digital-first access. In last year's survey, only half of consumers who preferred scheduling appointments online reported doing so. In 2023, the gap between preference and experience narrowed to a third. The percentage of consumers who book visits over the phone also dropped 15% since 2022, bringing experience and preference for this channel into near balance. Still, more consumers want to schedule appointments online than are currently using that channel.

How do you currently schedule care with new providers most often? How do you prefer to schedule care with a new provider?

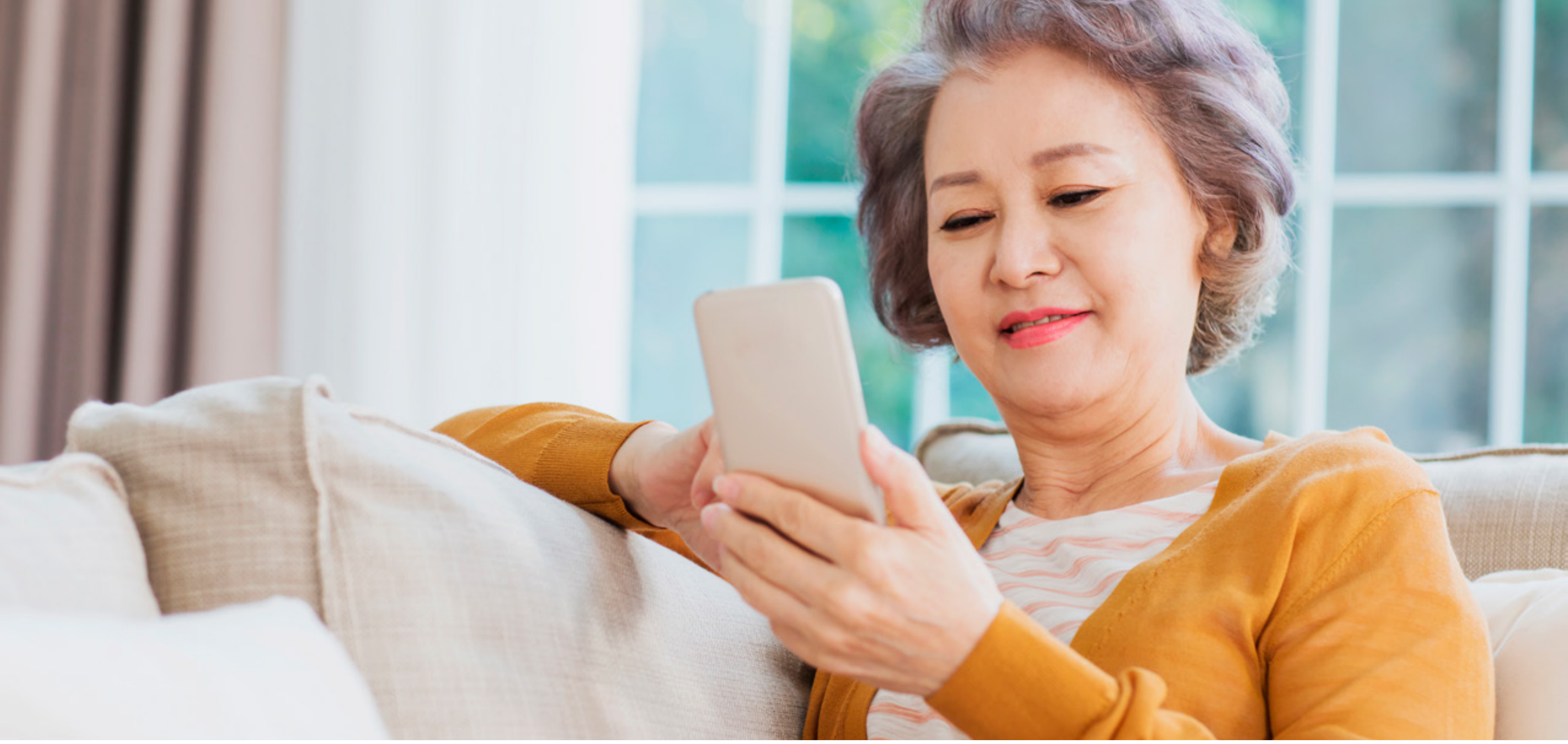
Currently schedule   Prefer to schedule

Over the phone via your health care provider

Online via your health care provider's website or app

Drilling into the data reveals that younger consumers are driving preferences for digital scheduling, while older patients mostly rely on phone calls.

Scheduling trends by age group



Returning patients want choice when scheduling care

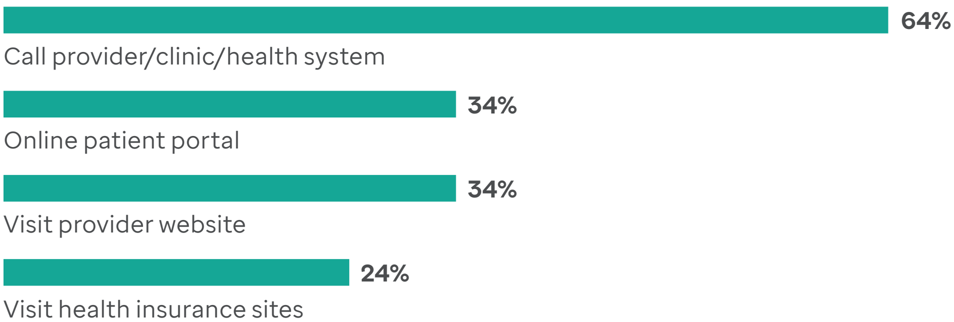
Consumer behaviors shift once they become established with a provider. Sixty-four percent of returning patients schedule subsequent visits by phone call. Online patient portals and provider websites are tied as the second most popular scheduling channels for a third of consumers.

Older consumers continue to drive preferences for phone call scheduling. More than 70% of returning patients ages 55+ chose to schedule appointments by phone, versus 55% of those ages 25–34. Instead of calling, younger consumers are more likely to use online patient portals or health system sites to schedule care with a current provider.

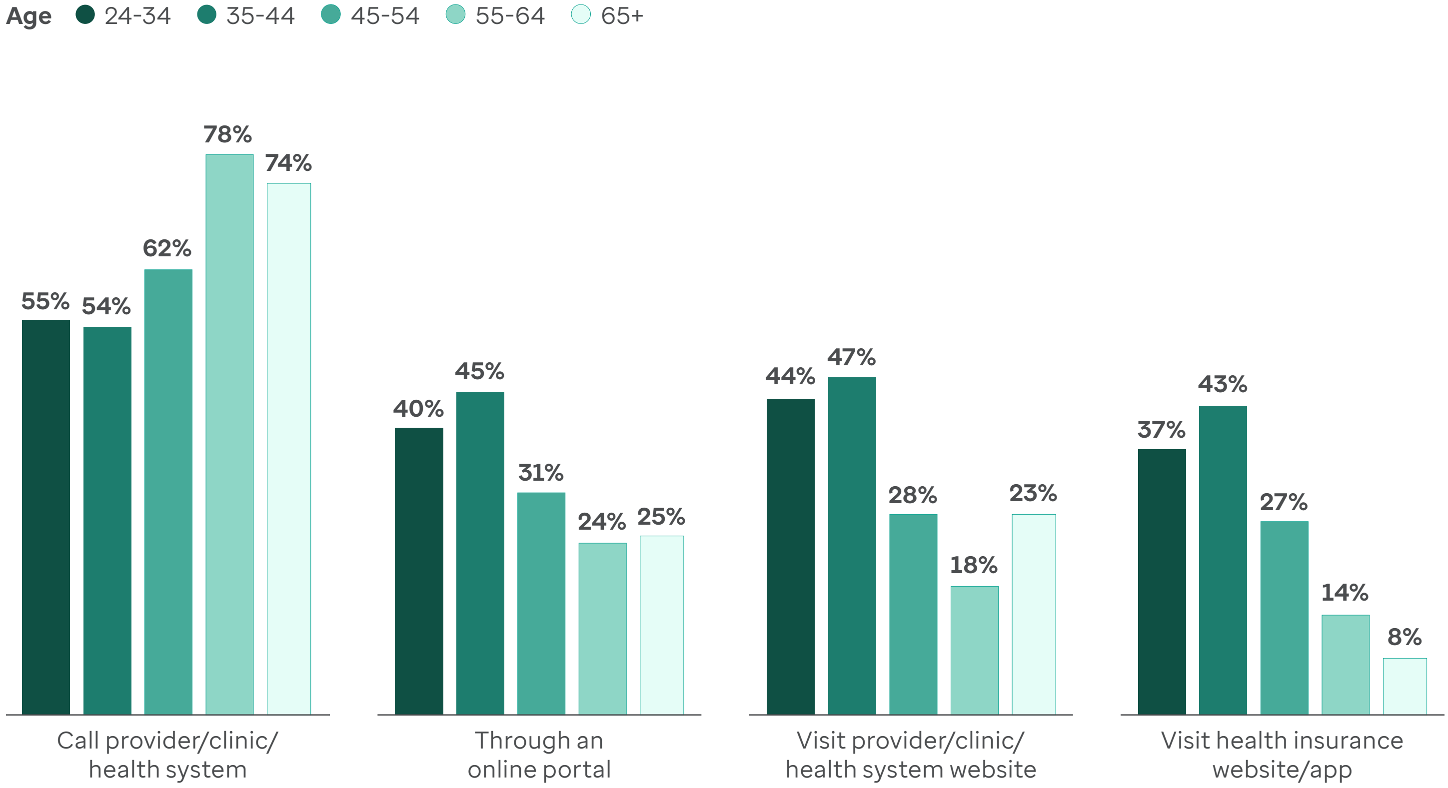
Most race and ethnicity groups preferred phone calls to schedule returning care, but Black and Asian consumers also favored online patient portals and provider websites.

When care is established with a provider, how do you prefer to schedule appointments?

Select all that apply



Top scheduling channels for established patients by age group



Returning Black and Asian patients are more likely to schedule care online compared to other groups

42%

of Black consumers use the patient portal to schedule care with an established provider

40%

of Asian consumers use their health care provider's website to schedule care with an established provider

Preparing for care

Health plan portals become a central destination in the patient access journey

From booking care to estimating costs, consumers visit health plan portals throughout their care journeys, with youth leading the way. Two-thirds of consumers have used health plan apps and portals to plan different aspects of their medical care in the last year. About 1 in 3 consumers used a health plan site or app to schedule an in-person appointment online.

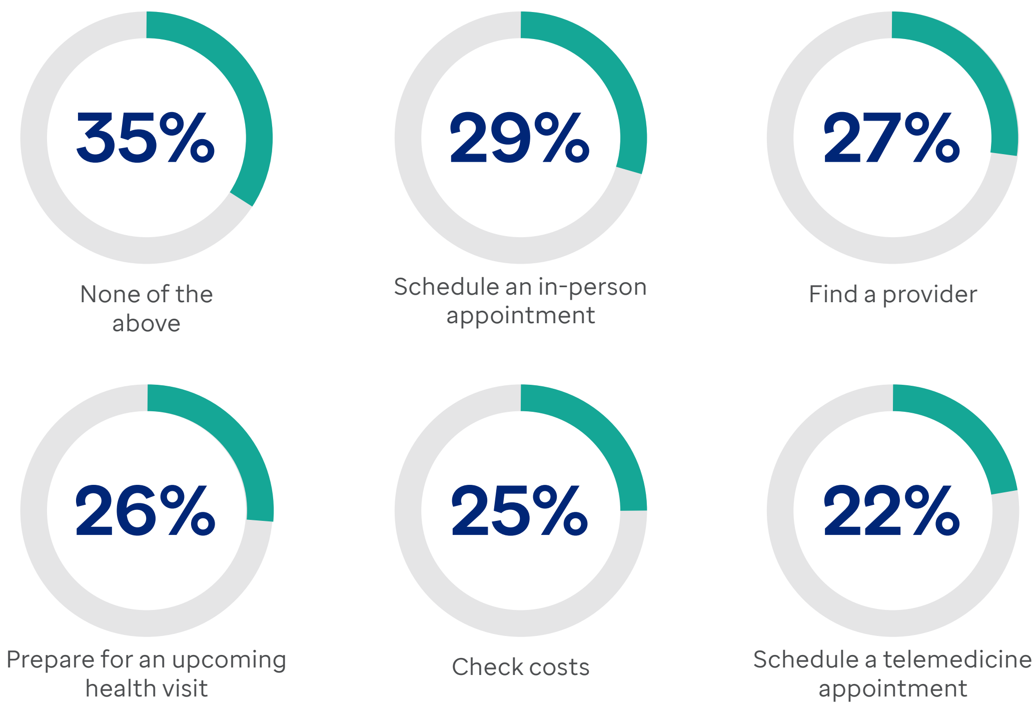
Consumers under age 44 are most likely to visit health plan websites to schedule and find care, while those over age 55 are less likely to use this channel.

About
33%
of consumers used a health plan site or app to schedule an in-person appointment online.

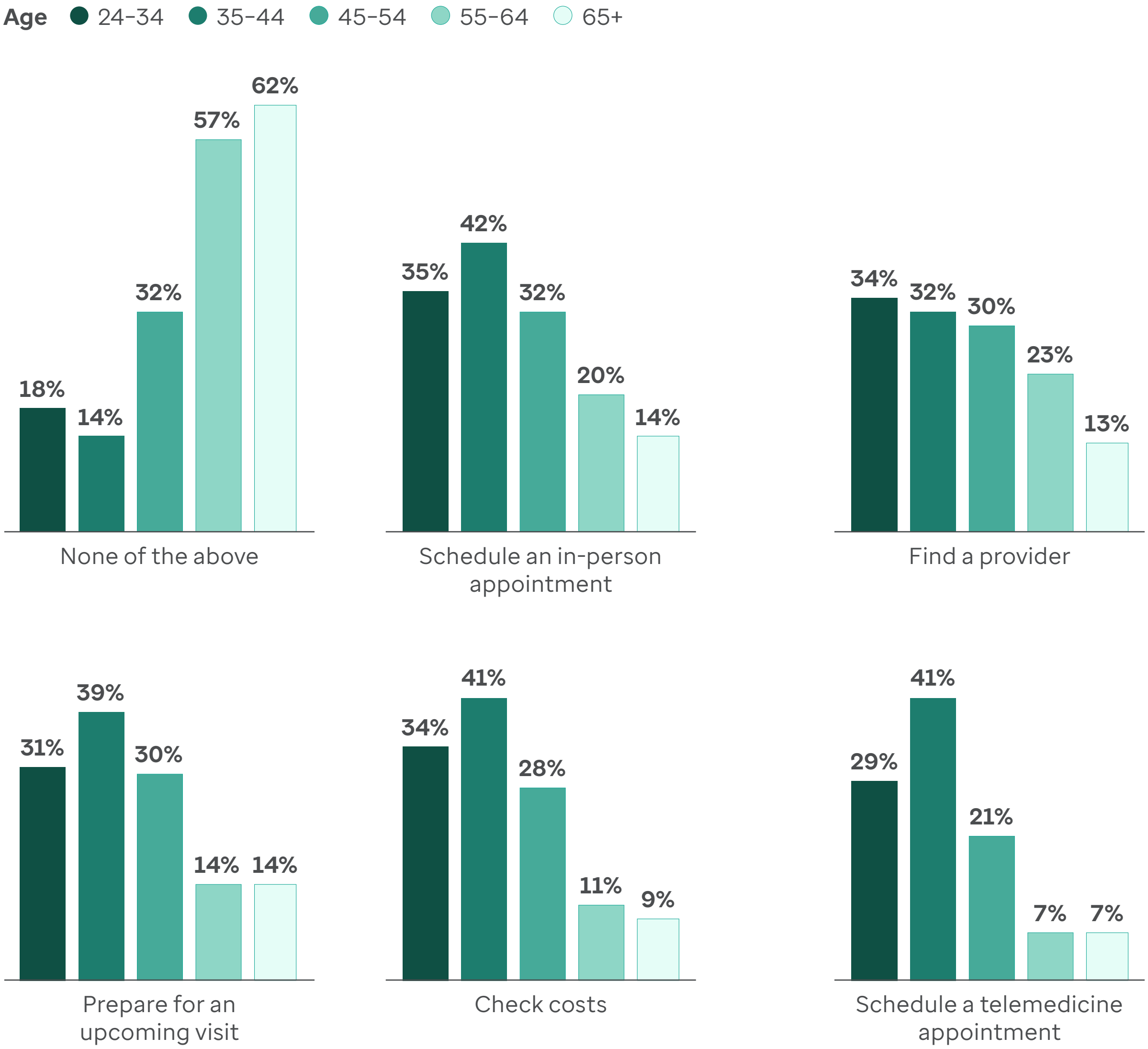
More consumers are using health plan websites to manage an aspect of their health care

Have you used a health plan's website or app to do any of the following in the last year?

Select all that apply



Use of health plan portals to manage care by age group



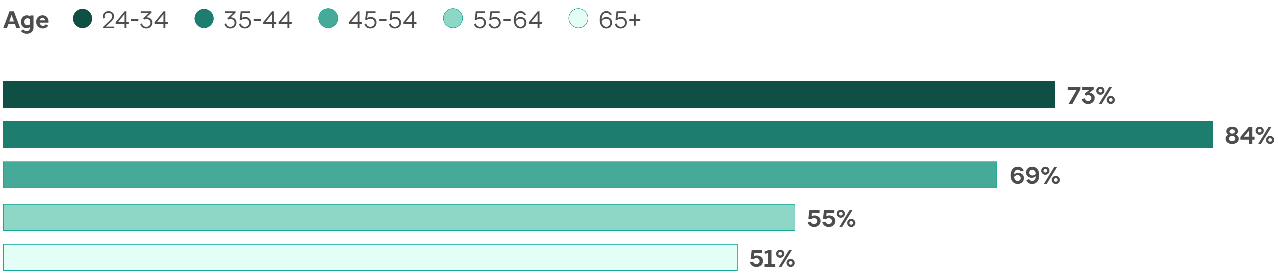
Digital check-in apps and websites gain momentum despite lower awareness

Rather than fill out patient intake forms at the front desk, 67% of consumers use digital check-in apps or websites to complete paperwork online before their visit.

But consumers still stick to paper processes for a variety of reasons. Of those who don't use digital check-in apps, 51% say they prefer to prepare for their visit in person. Another quarter of consumers say they just don't know if digital check-in is available to them.

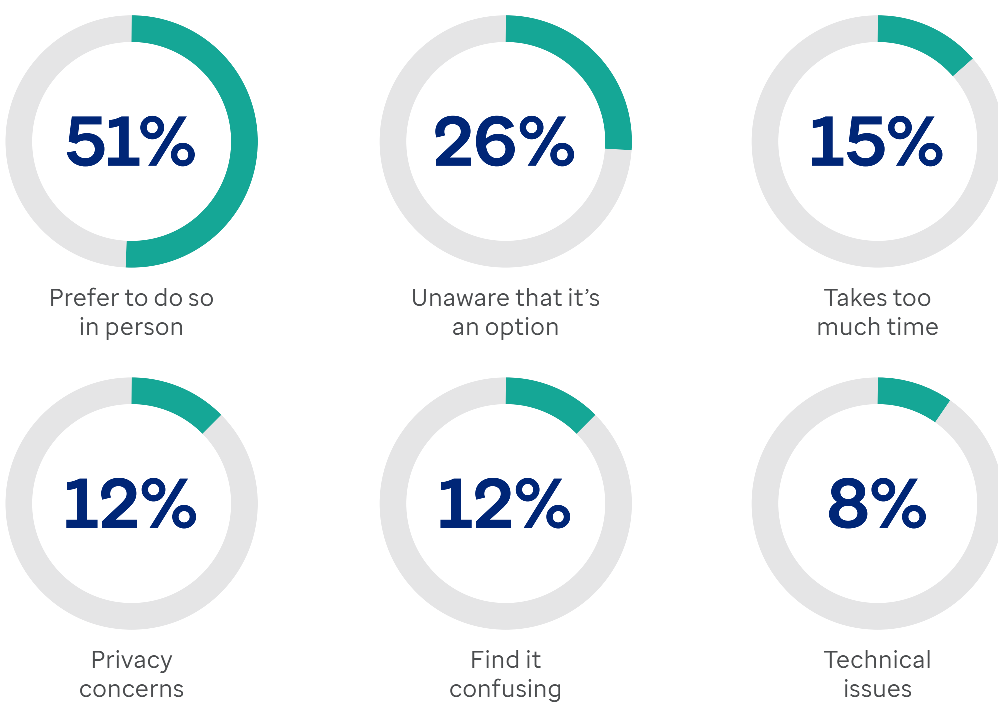
67%
of consumers use digital check-in apps or websites to complete paperwork.

Consumers who use apps and websites to prepare for appointments by age group



Top reasons consumers don't use apps or websites to prepare for an upcoming health care visit

Select all that apply



A drop in no-shows signals greater patient engagement

Preparing for medical appointments is key to successfully attending the visit. Consumers caught off guard by distance, paperwork and other details can become no-shows, costing providers an average of $200 per missed visit.[5]

Fortunately, our results show that 58% of consumers didn't miss any medical appointments in the last year, up from 48% in 2022. Fewer consumers report forgetting about their appointments as well. Consumers under age 45 and Hispanic/Latino consumers are most likely to have missed an appointment in the last year.

58%

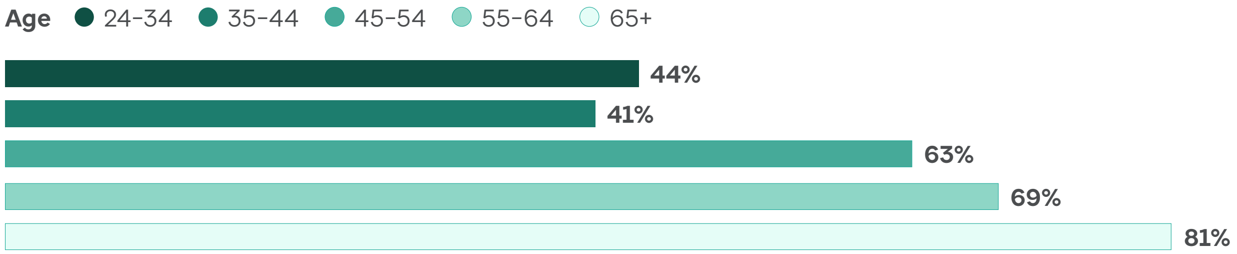
of consumers didn't miss any medical appointments in the last year.

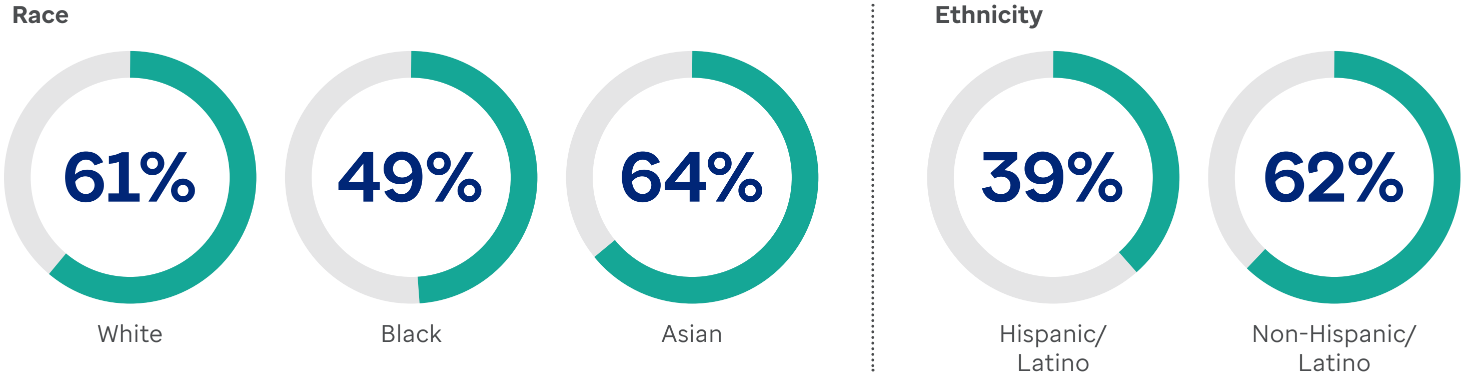
It's getting easier for consumers to remember and attend their appointments

Consumers who didn't miss any medical appointments

Consumers who forgot about their appointments

Consumers who didn't miss any medical appointments in the last year





Top reasons for missing a health care appointment

Select all that apply

14%
I couldn't get to the appointment on time

13%
My provider canceled the appointment

8%
The telehealth technology didn't work

12%
I forgot about the appointment

16%
I missed it for another reason

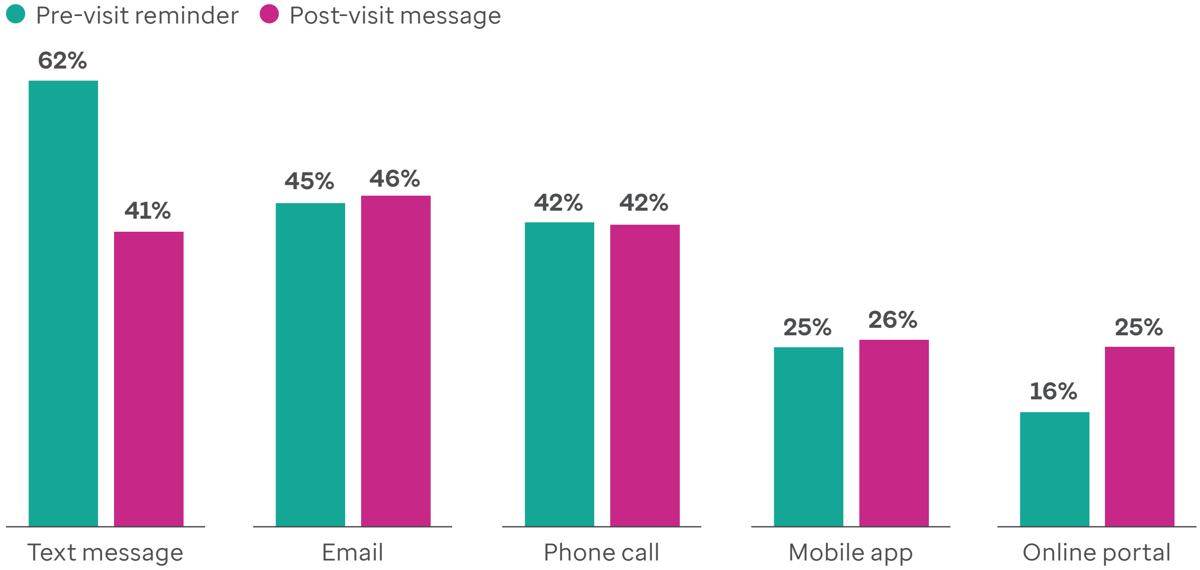
Text message reminders are popular across age groups

Text message reminders push appointment information directly to devices already in consumer hands, making them one of the most accessible methods of patient-provider communication. Sixty-two percent of consumers say they prefer to get text reminders before medical appointments.

After their appointment, consumers would rather be emailed by their providers. Slower or less accessible modes of communication, like online patient portals, are also more popular for post-visit messages.

How do you prefer to communicate with providers?

Select all that apply



Top health care issues according to consumers

Consumers say the two most important aspects of accessing care — convenience and cost — are also their top health care issues. Half of survey respondents named convenient access to their preferred provider as the most important health care-related issue. As medical costs rise nationwide, 4 in 10 consumers are also concerned about maintaining their insurance coverage and reducing health care costs.

Convenient access is most important for consumers ages 65 or older. Younger consumers find cost transparency and savings nearly as important. Hispanic/Latino and Asian consumers are also among the most concerned with insurance and keeping costs down.

50%

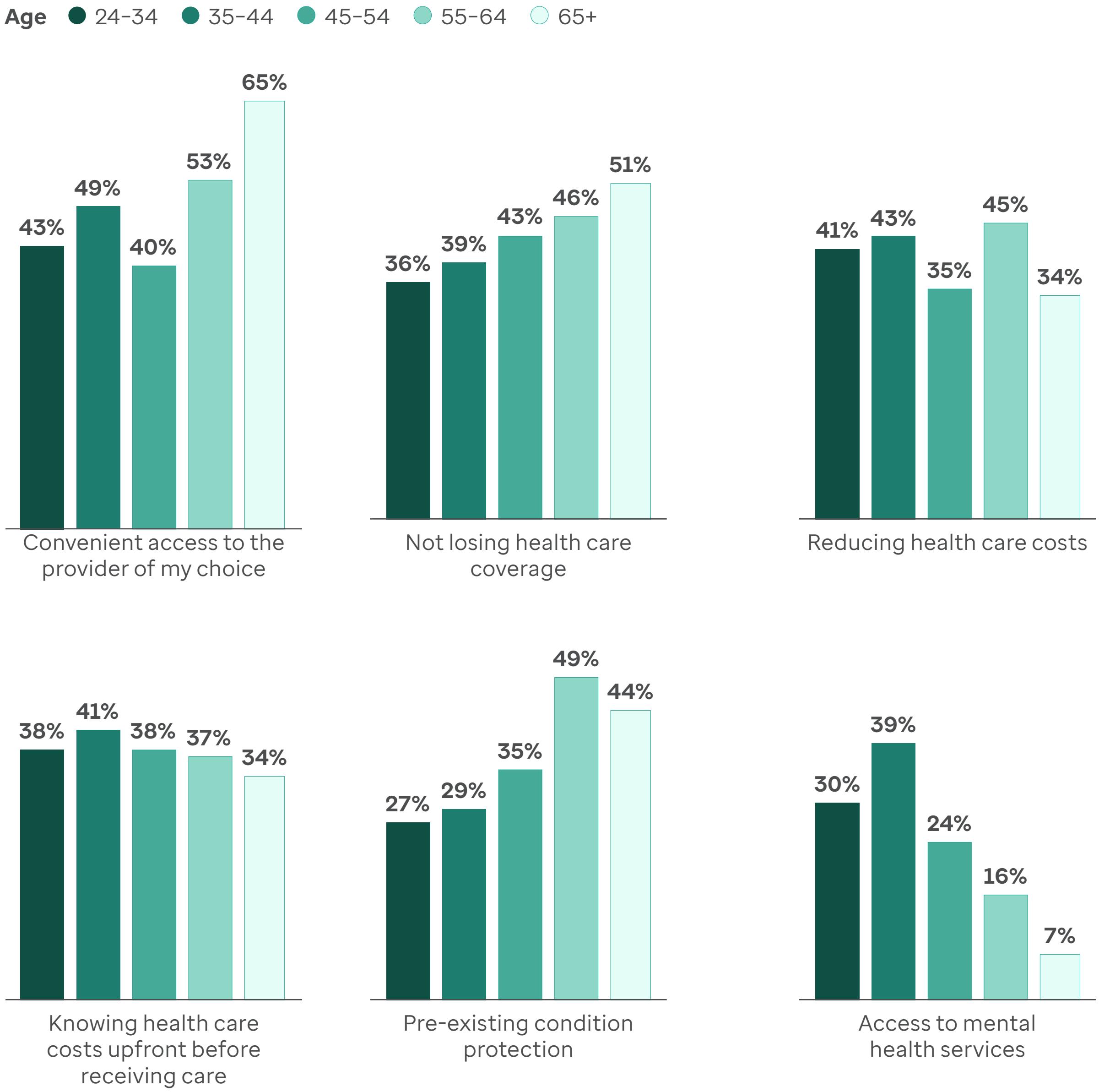
of survey respondents named **convenient access to their preferred provider** as the most important health care-related issue.

Which health care-related issue(s) are most important to you?

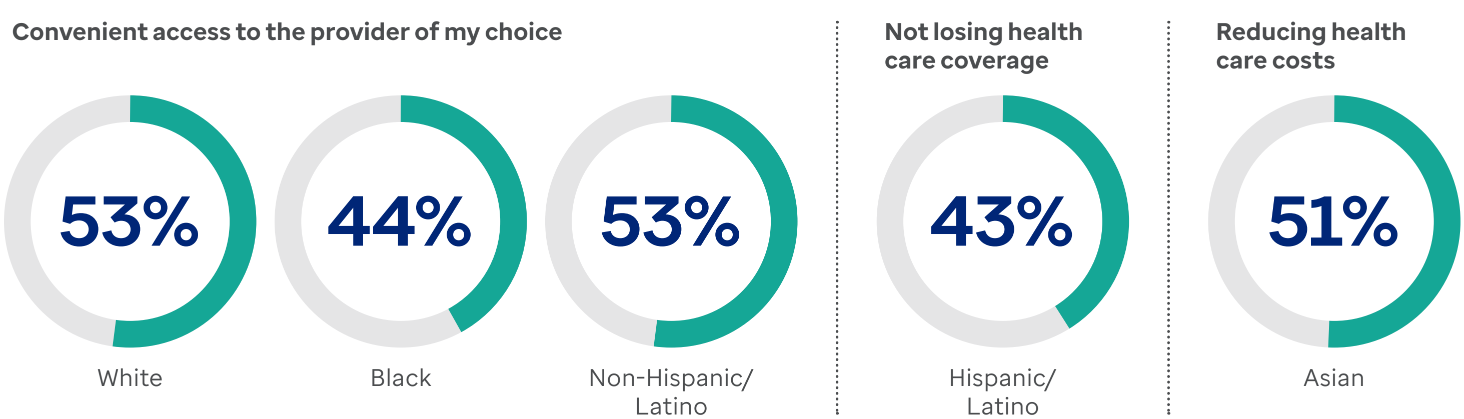
Select up to 3

50%	43%	40%	38%	36%	24%
Convenient access to the provider of my choice	Not losing health care coverage	Reducing health care costs	Knowing health care costs upfront before receiving care	Pre-existing condition protection	Access to mental health services

Top health care-related issues by age



Top health care issues by race, ethnicity



Conclusion

Meeting consumer expectations is challenging when preferences vary wildly across demographic groups. While consumers largely agree that convenience and control are important, non-white consumers have differing views on what those factors mean to them. Digital methods of seeking care and communication are also common, but older adults want to keep using traditional phone or in-person methods.

Despite these differences, digital channels for finding and scheduling care continue to gain traction. Consumers are also more willing than ever to prepare for appointments online or visit their health plan portal to understand their costs. Providers have a rich opportunity to extend their reach and engage more patients with omnichannel strategies that open multiple pathways to their digital front door — improving access, satisfaction and revenue.

Leverage omnichannel strategies for expanding access to care with Optum Patient Access and Engagement. Click here to learn more.

Optum

optum.com

[1] Baumgartner, J., Collins, S. and Radley, D. Inequities in Health Insurance Coverage and Access for Black and Hispanic Adults. The Commonwealth Fund. March 2023.
[2] 2022 Survey of Physician Appointment Wait Times. Merritt Hawkins. August 2022.
[3] 2023 Healthcare Reputation Report. Reputation. March 2023.
[4] Appleby, J. and Andrews, M. Will the Doctor See You Now? The Health System's Changing Landscape. KFF Health News. June 2023.
[5] The True Cost of Patient No-Show Appointments. Intrado Healthcare. May 2021.