# Steer Health

# The New State of Patient Experience Report:

## 2023 & BEYOND

Insights, trends, risks, and opportunities in the consumer-led digital revolution in modern healthcare.

# ABOUT THIS REPORT

**"The New State of Patient Experience Report: 2023 and Beyond" is for healthcare leaders looking to grow their practices by providing an improved patient experience and stellar customer outcomes.**

Whether your goal is to acquire new patients, realize operational efficiency, address staff shortages and lack of engagement, or simply improve patient experience—this report will equip you with 2023 insights and practical strategies to achieve your goals.

The Steer Health Research Team reveals exclusive behavioral insights into modern healthcare consumers. Plus, an overview of the latest strategies that are fueling the success of a new-wave of leading organizations in the current healthcare market.

Our goal is to share how patient behavior has evolved in the post-COVID world, which trends will persist through 2023 and beyond, and reveal attainable changes that forward-thinking health systems, hospitals and medical groups can use to drive growth and stellar patient experiences.

# EXECUTIVE SUMMARY

Through working with industry-leaders like Prime Healthcare, Penn Medicine, Neurology Associates of Texas, OC Surgeons, Island Dermatology, Coastline Orthopaedics Associates, and more, Steer Health, the premier Patient Experience and Growth Platform for medical organizations, has developed unique insights into consumer behavior in the healthcare market.

Our deep analysis of customer behavior and market trends uncovered two fundamental truths about healthcare that are vital for any organization wanting to grow and succeed in 2023 and beyond:

- Patients are the new market makers
- Above all else, consumers make decisions based on patient experience

Healthcare consumerism is here to stay. And to gain the trust and loyalty of customers, providers must fix the broken traditional journey.

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Patient's demands and expectations have exponentially increased, all during a time where staff shortages, clinician burnout, and employee disengagement have reached epidemic proportions. For most businesses, increasing human resources is not a viable option, but there are several ways to leverage innovative new technologies to enhance patient experience, without placing additional burden on staff.

*Patient experience will be the separating factor between the healthcare organizations that succeed in 2023 and beyond, and those that fail.*

Healthcare leaders must focus on delivering simpler, more convenient, and more human-centric experiences, tuned to the changing needs of people's lives. And in this new era of staff shortages, clinician burnout, medical consumerism, and increasing patient expectations—a digital-first approach is the only way to remain competitive.

Finding a strategic tech partner who can build the necessary infrastructure and power patient experiences with intelligent automation will help healthcare organizations meet and exceed patient expectations across the healthcare journey, and set themselves apart and up for success.

# ADAPTING TO THE NEW REALITY

A convergence of factors in the post-COVID world led to a startling realization amongst healthcare consumers and forward-thinking medical organizations:

## The traditional patient journey is broken.





- Long wait times to access treatment
- Scheduling changes and poorly coordinated care
- Convoluted registration, intake, assessment, and payment processes
- Poor communication with doctors, nurses, allied health clinicians, or administrative staff

And while organizations scramble to catch up with changes in consumer expectations, several new challenges are making transformation exceedingly difficult.

The US healthcare system is battling crippling staff shortages, epidemic levels of staff burnout and employee disengagement, higher patient expectations, and competition from a new wave of disruptive, digital-native competitors, who are capturing an ever- increasing market share.

The New State of Patient Experience Report: 2023 & Beyond

## In today's technology driven age, patient's are the new market makers.

Empowered consumers are seeking the convenience and efficiency of personalized digital engagement and care options. And when an organization can't deliver this or falls short on expectations—customers aren't afraid to switch providers.

In 2023 and beyond winning the trust and loyalty of patients requires a fresh, innovative approach.

The healthcare organizations that survive in this new reality will be those who embrace a fundamental truth about how the modern consumer makes choices about their healthcare spend:

*Above all else, customers value simpler, more convenient, and more human-centric patient experiences tuned to the changing needs of their lives.*

# THE IMPORTANCE OF PATIENT EXPERIENCE

Patient behavior and expectations have changed dramatically in recent years. And in 2023, patient experience, or PX, will be the key difference between healthcare organizations that thrive or fail. Here are some key insights into the importance of PX in the current healthcare market.

A recent Harris Poll commissioned by Tegria found that 7 in 10 Americans would **consider switching to another healthcare provider that offers more appealing services**. Top factors influencing customer decisions around provider choice were:
- Same-day appointments
- Self-scheduling
- The ability to use technology to manage the healthcare experience

**Today's patients make decisions in real-time, based on the options immediately available to them.** Only about 50% of patients report having a primary care provider they use for almost all of their care, while nearly 30% state they do not have a preferred primary care provider at all. This demonstrates that prompt access to care is becoming more important to consumers than having one regular provider.
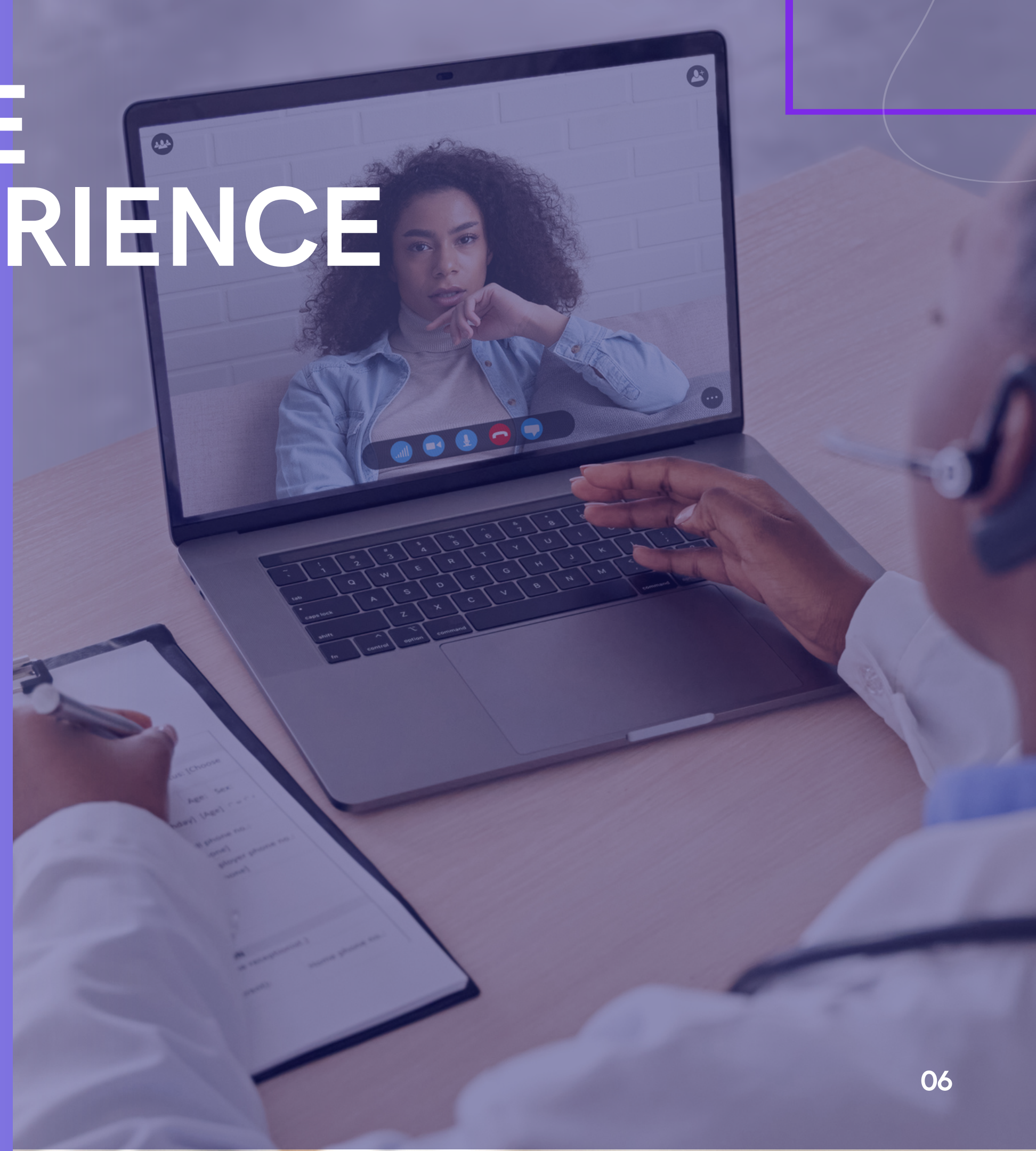
**Increasing patient expectations require healthcare organizations to shift from a reactive to a proactive and personalized digital-first model.** In 2020, 49% of consumers surveyed by **Forrester Analytics** said they wished their digital healthcare experience was smoother and more intuitive, like Amazon, Netflix, and Uber.

Numerous studies, including a recent survey by the Deloitte Center for Health Solutions, found a strong link between patient experience, improved financial performance in hospitals, and key measures of high-quality care.

Put simply, healthcare organizations that do not meet (and exceed) expectations around patient experience in 2023 will fall behind. They will lose market share to the new disruptive, digital-native players in the market, and be unable to establish the trust and loyaltyrequired to attract and retain their customers.

# WHAT IS PATIENT EXPERIENCE?

The patient experience is a journey that touches all of us, at every point in our lives. We plan for a new addition to the family. Bones get broken. We unexpectedly get sick. Health industry players need to understand the varied and changing expectations of health consumers to build life-long personal connections and tailored services that evolve with a patient on their journey.

Patient experience, or PX, describes the consumer's perceived level of satisfaction at any touchpoint throughout the healthcare journey. Relevant PX factors will always vary depending on the healthcare setting and patient cohort. And the only way to be 100% sure what PX factors your organization should focus on is to collect real-world customer data.

To give an example of PX analysis, a McKinsey report on **Measuring the Patient Experience** ranked the derived importance of 23 factors related to patient satisfaction with inpatient providers.

**TOP 5**
1. Staff empathy
2. Keeping patient informed
3. Access to care
4. Outcome of procedure/care
5. Cleanliness of room

- Administrative simplicity
- Ease of care navigation
- On time appointments
- Patient's access to medical records
- Ease of scheduling appointments

Crucial to understanding the insights contained in this report, is the fact that *"Outcome of procedure/care" ranked fourth in patient experience factors* for inpatient providers.

Of course, high-quality clinical care should always be top priority for any healthcare service. But our analysis suggests that this alone is not enough for healthcare providers to be competitive in the current market.

**In 2023, healthcare consumers demand a satisfactory experience throughout their entire journey of care**—not just in the acute/clinical phase of treatment. Considering the relatively low cost of many patient experience initiatives, healthcare organizations can see a healthy ROI on investments to improve PX.
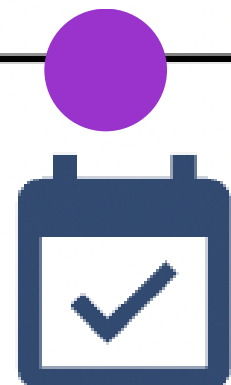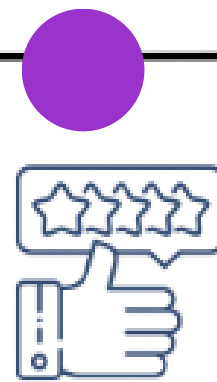
# KEY HEALTHCARE CONSUMER INSIGHTS FOR 2023

**These are the key Patient Experience factors that will help healthcare providers grow and build loyalty and trust with consumers in the current market.**
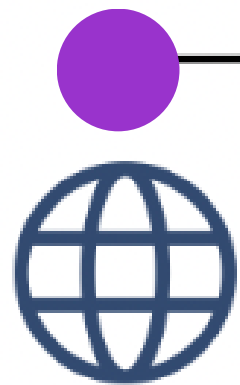
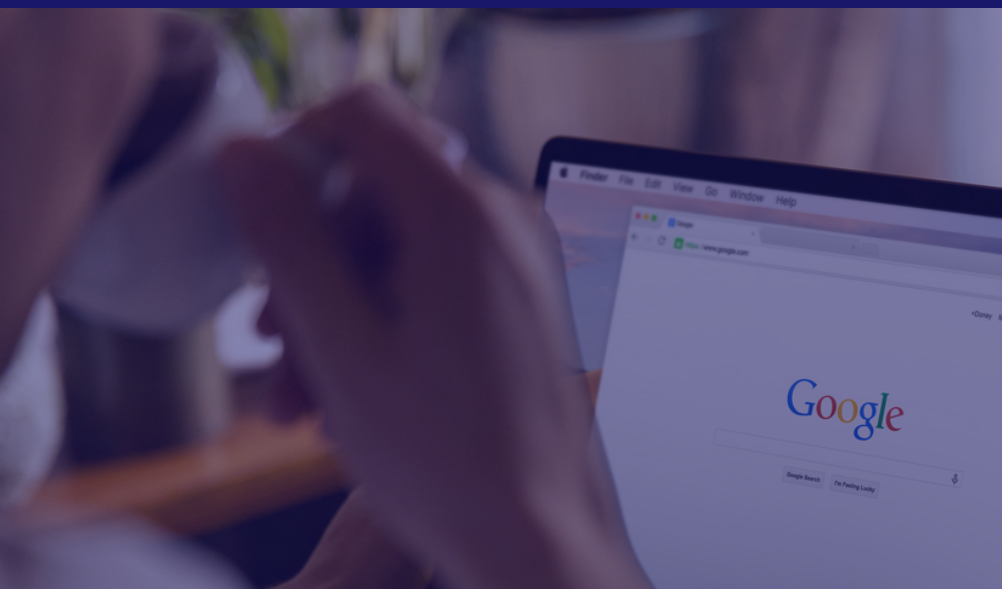**Discoverability**  **Access to care**  **Online Reputation**  **Trust**  **Self Service**

# Discoverability

Consistent with the digital-first mindset of today's consumers, the internet plays a significant role in healthcare consumers' **discovery process** for finding both healthcare providers and care services.

**3X MORE HEALTHCARE WEBSITE TRAFFIC COMES FROM SEARCH THAN DIRECT VISITS.**

**3X**

Put simply, healthcare businesses that want to grow their customer base must have a strong online presence.

**Key Takeaway: We know customers are looking to switch to providers who offer superior patient experience. The question is—will they be able to find you?**

# Access to Care

The modern healthcare consumer values access to care above all else. Patients want to know that when they choose a healthcare provider, they will easily be able to access care when they need it. This is a significant paradigm shift from the old model, where the belief was that patients prioritized consistency in doctor/clinician.

Key factors that patients demand when it comes to access include:
- The ability to get an appointment quickly
- Online scheduling of appointments
- Convenient appointment hours (e.g., weekend & after hours)
- Telehealth and virtual care options
- Digital interaction, such as mobile, secure message, social media

**90%** of patients, including Baby Boomers, want access to self-scheduling tools

90% percent of all patients, including Baby Boomers, told Salesforce they want access to self-scheduling tools, but only 53 percent of providers offer that capability. And many of those are simply online request forms that are not actually integrated into provider workflows.



94% OF HEALTHCARE CONSUMERS USE ONLINE REVIEWS TO EVALUATE PROVIDERS

94%
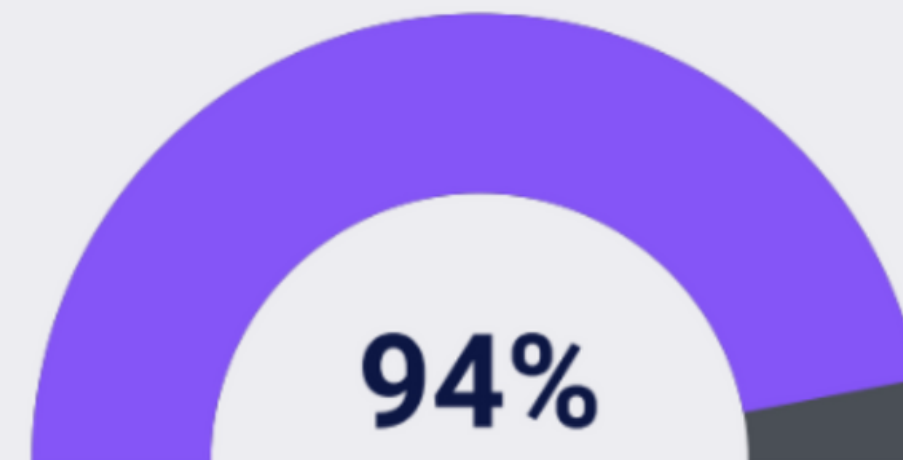
**Key Takeaway: Patients want fast and easy access to care, even for what might be considered "non-urgent" matters. They also want to book appointments online.**

# Online Reputation



Patients increasingly rely on online reviews to research, find, and select new healthcare providers. In fact, online reviews are the third most important factor that influences the patient's decision to select a new healthcare provider.

Online ratings help doctors build trust with prospective patients. In the past, patients may have turned to word-of-mouth recommendations. Today, **most patients use online ratings** to find out about a doctor.

**Key Takeaway: Discoverability alone isn't enough. Patients are more likely to choose (and stay with) providers with a solid online reputation.**
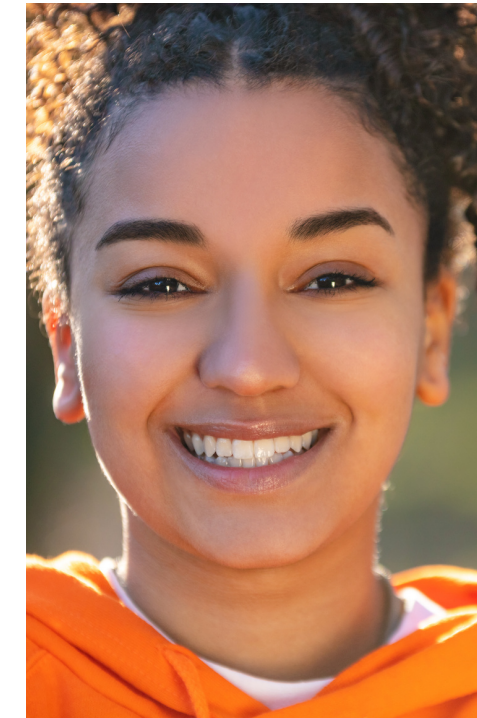


78% OF HEALTHCARE CONSUMERS PREFER DOCTORS RATED 4 OUT OF 5 STARS.

78%
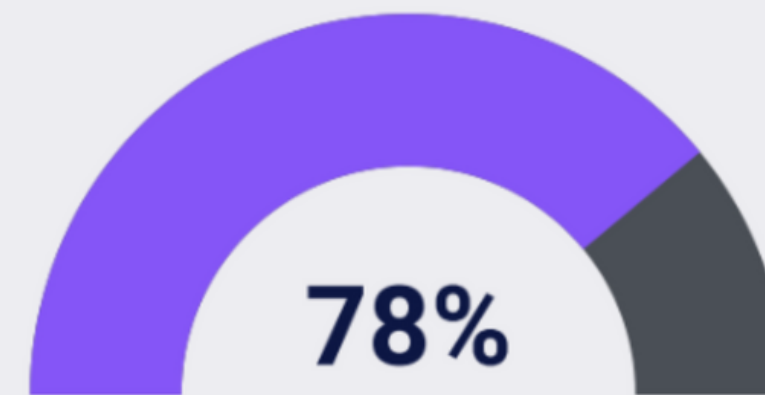
# Trust Leads to More Engagement

**Trust isn't just valuable to attract and retain new patients—it increases the engagement of customers you already have.**

When patient expectations are properly met by a healthcare organization at the beginning of their journey, they'll have more trust, establish more authentic connections, and be more likely to utilize additional services from a business.

One of Steer Health's customers reported a 24.7% on average monthly increase in business profile appearances on Google through their optimized web presence, SEO, and enhanced profiles.

CUSTOMERS SEE 24.7% INCREASE
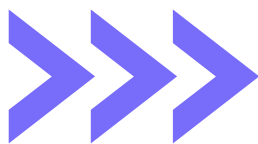IN BUSINESS PROFILE APPEARANCES
ON SEARCH RESULTS YOY

**24.7%**

The New State of Patient Experience Report: 2023 & Beyond

The same customer saw increased monthly patient engagement on the website.

**87** LAB RESULT REQUESTS

**23** REFERRAL REQUESTS

MEDICATION REFILL REQUETS
**327**

Additionally, Steer Health's customers see +1980% increase in reviews and 52% in ratings indicating patients' increased engagement and strengthened trust in the providers.

CUSTOMERS SEE +1980% INCREASE IN REVIEWS AND 52% IN RATINGS

**+1980%**

What these numbers prove is that, more and more, patients are responding to healthcare organizations who take the time to anticipate their needs.

From building easy-to-navigate webpages to allowing patients access to their data with a single click, every detail matters.

**Key Takeaway: A seamless digital experience increases trust. When a patient trusts your business, they are more likely to consolidate their healthcare spend with your business, increasing customer lifetime value.**

# Self-Service Improves Fill Rates

**CUSTOMERS SEE +261% NEW ONLINE APPOINTMENTS/REFERRALS BOOKED BY PATIENTS.**

**261%**

Suboptimal fill rates can have a devastating impact on productivity and profitability. To stay competitive, healthcare businesses must be able to fill their lists and ensure patients turn up to appointments (both in-person and virtual).

Highly personalized, patient-first self-service scheduling tools such as AI Chatbots, Virtual Voice Assistants, or website widgets can positively influence fill rates.

Across Steer Health's customers, including enterprise and boutique healthcare organizations, data has consistently shown +261% new online appointments/referrals booked by patients. In fact, according to our intel, 85% of users respond to our pre-appointment preparation, which reduces no-shows by over 92%.

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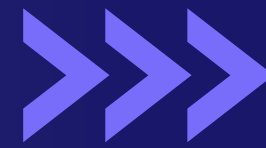
Furthermore, adopting the Steer Health AI-powered plug and play suite of tools has helped one of our customers provide a better patient experience by optimizing the inbound call volume.

# 59%
**REDUCTION HOLD TIME**

# 60%
**REDUCTION ININBOUNC CALL VOLUME**

AI-powered Virtual Voice Assistants and 2-Way SMS Solutions can decrease phone wait times by 59%, on average, and reduce inbound volumes by 60%. This can prevent no-shows by enabling patients to contact providers to clarify appointment details.

**Key Takeaway: Providing digital tools for your patients to manage their appointments leads to more bookings and less no-shows, maximizing your productivity and profitability.**

# Personalized Outreach

Building a strong relationship between the physician and patient is an important part of improving patient experience and outcomes. When providers follow up with personalized care after a visit, it:

- Makes patients feel valued
- Provides a safety net for any post-treatment concerns
- Assists in the management of chronic conditions
- Encourages customers to continue seeking care from the provider.

But there are significant challenges to personal outreach in the current system. >>>

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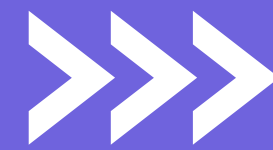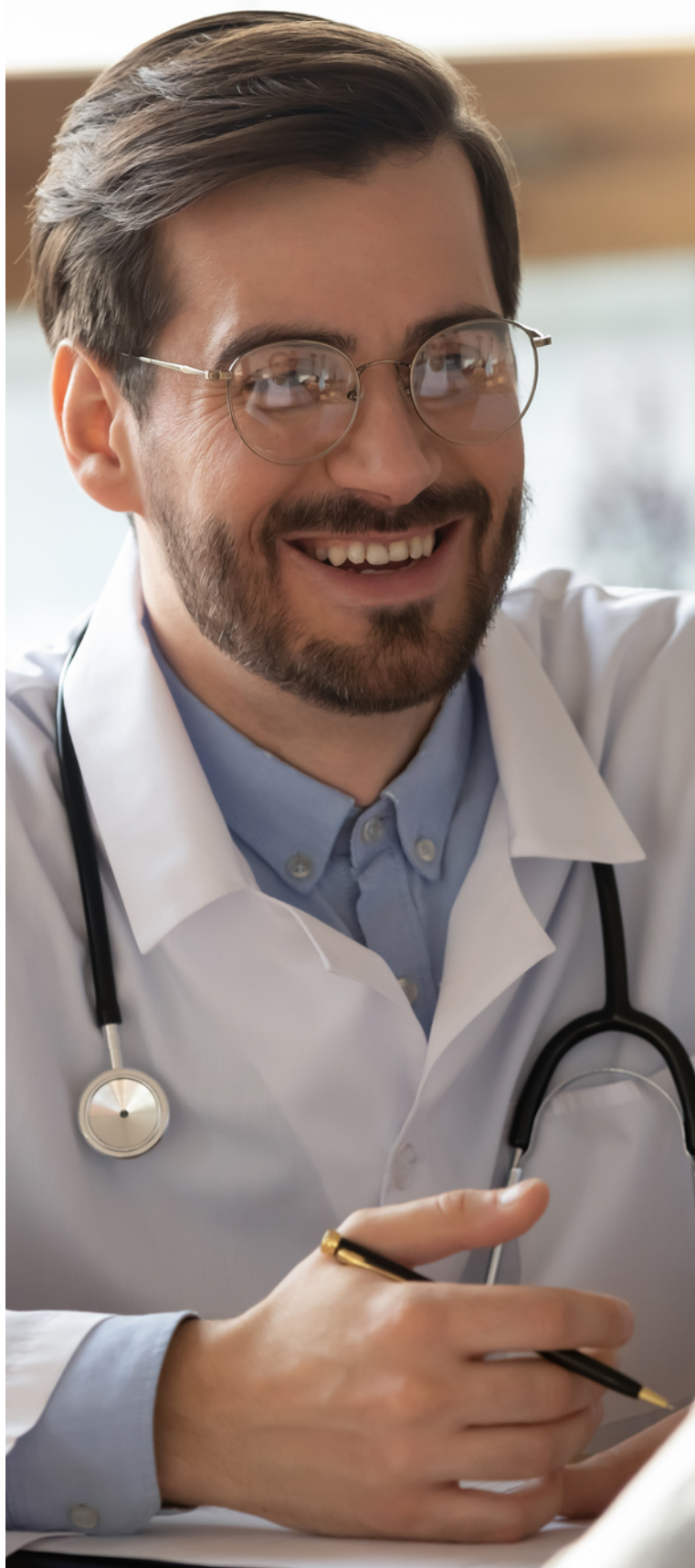
Staff shortages, clinician burnout and employee disengagement have left most healthcare organizations struggling to even deliver standard care services. Physicians, nurses, allied health practitioners and care coordinators are at breaking point. And the mere mention of added workload with additional personalized outreach is likely to cause a revolt.

While it's no silver bullet, digital tools that facilitate contextual engagement with patients can reduce the resource challenge of providing personalized outreach. Some examples for patients with diabetes might include:

- Remote monitoring that triggers a reminder to increase activity levels or monitor blood glucose levels more frequently
- Automated reminders of a regular podiatry appointments or retina exams
- Prompts to book a review with a healthcare provider when glucose levels are abnormal

Healthcare organizations that empower their staff with digital tools are able to get valuable feedback from patients and proactively engagement to bring them back for preventive care or other existing care gaps.

Our customers see improved patient loyalty and retention by over 92% with personalized AI powered post visit check-ins and automated referrals.





CUSTOMERS SEE IMPROVED PATIENT LOYALTY AND RETENTION BY OVER 92%

92%

**Key Takeaway**: Digital tools that enable personalized contextual engagement with patients can enable both consumers and providers to benefit from personalized outreach, even in a resource constrained environment.

# Now is the time for healthcare organizations to make a choice:

**Embrace the new reality that superb patient experience is the new deciding factor in the healthcare market—or get left behind.**

**Patients are the new market makers**, and to succeed in 2023 and beyond, providers must deliver on the four **non-negotiable pillars** of stellar patient experience.

- **Access**
- **Ease of doing business**
- **Digital engagement**
- **Trust**

Read on to see how working with a technology partner who understands patient experience can help healthcare forward-thinking healthcare organizations achieve these four outcomes and thrive through 2023 and beyond.

# ACCESS

**OnDemand virtual care is a must have in today's healthcare market.**

Today's patients expect fast service and excellent care. The best way to offer this is allowing your patients to make healthcare decisions quickly by offering self-service tools on your website.
Enable technologies on your website that make it possible for patients to:
- Easily book appointments 24/7
- Submit online medication refill and lab requests
- Leave messages and communicate with key clinicians involved in their care
- Complete eRegistration
- Make digital payments and check outstanding accounts

An AI-powered, HIPAA Compliant Chatbot solution on your website can easily resolve patient inquiries by providing instant support, while simultaneously significantly reducing the repetitive calls your staff handles every day.

Additionally, for fast tracking and care delivery arbitrage, integrated communication tools, and referral automation, you can integrate OnDemand Care options into your digital platform.

*Must Have: Give your patients access to engage with your practice wherever and whenever works best for them, using the device and method they prefer.*

# EASE OF DOING BUSINESS

**To become the provider of choice, be easy to work with.**

Like it or not, healthcare consumerism is here to stay. And in the era of seamless digital experiences across everything from ecommerce, to transport, to grocery shopping, and entertainment—consumers expect providers in any industry to be easy to do business with.

Disruptive new digital-native startups have already capitalized on this dynamic in specialities like outpatient psychotherapy, hormonal health, sexual wellbeing, and psychopharmacology. And the more traditional healthcare markets, once thought immune to digitalization and virtual care, will be next.

Technology facilitated ways to be easy to work with can include:

Virtual check ins. Long check-in lines and crowded waiting rooms are becoming a thing of the past. Patients expect fast, quality service from start to finish. Facilitate this by allowing online check-ins before scheduled appointment times or procedures.
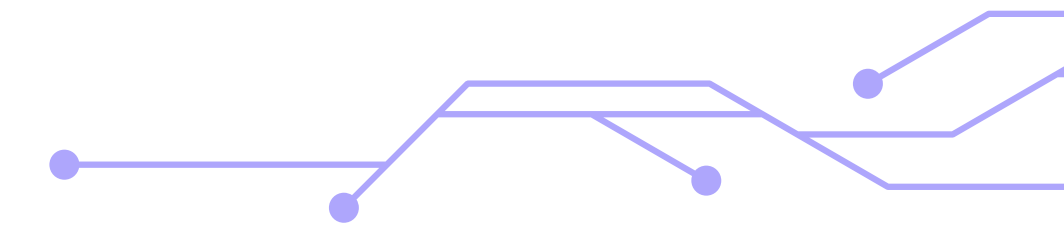
Intuitive payment portals. Transparency about price in an easy-to-understand format for patients is an important part of building trust. Online payment portals can provide patients details about cost of treatment, reimbursement information from payers, and an easy way to make payment and view their account.

Referrals management. Providing an intuitive patient-accessible platform to manage internal and external referrals builds loyalty and customer engagement. Digital referral platforms can allow patients to view and access referrals, making them feel heard and involved.

*Must Have: A unified digital platform to manage check-ins, payments, referrals, and other key touch points along the patient journey provides a seamless customer experience and builds loyalty.*

# DIGITAL ENGAGEMENT

**Meet your patients where they are, by being accessible via a range of digital platforms.**

As more patients turn to Google to connect with quality healthcare providers, the first step in helping them discover and connect with you is through a modernized website that is optimized for search performance and converts visitors into patients.

Be sure to further improve your online visibility by improving your Google My Business account, optimizing the MD profiles and local physician healthcare directories. Activating these strategies will help you stand out from the competition and drive more visitors to your website.

Additionally, further educate and empower your prospective patients to book that first online appointment with your practice by maximizing your growth efforts through Search Engine Marketing and Social Media Marketing techniques. Consistently publish industry-specific educational content that is SEO-optimized and distribute it across different Social Media channels. This will help you draw in new patients and position yourself as a trusted expert.
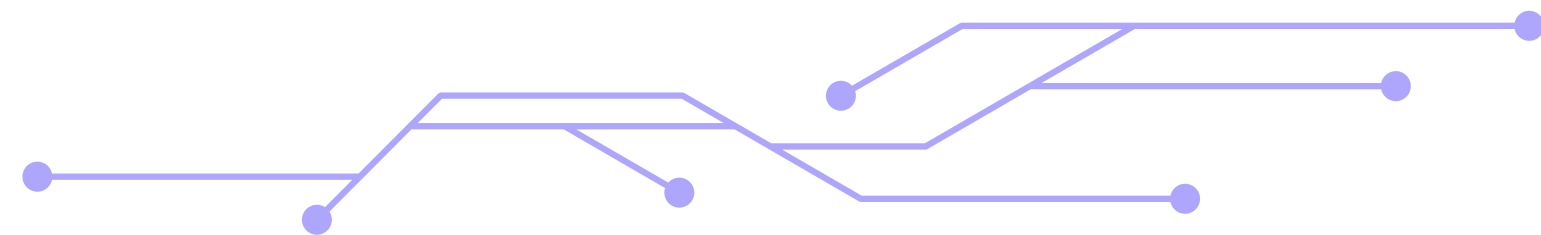


*Must Have: A modernized website that is optimized for search performance drives engagement, builds trust, and converts visitors into patients.*

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# TRUST

The only way to retain existing patients and bring new customers in is through trust. And every touchpoint of the patient journey is an opportunity to enhance (or lose) trust. The key to improving this vital area of customer experience is making customers feel seen and heard.

By enabling meaningful patient engagement experiences with the right automation tools, nurses and providers are able to learn what their patients are thinking and feeling in real-time. Some tech-enabled examples include:

- Eliminate phone tagging and long hold times by providing your consumers with secure 2WaySMS capabilities.
- Offer AI enabled voice systems so your patients needs such as medication refills, lab requests and billing issues can be addressed using automation on a 24/7 basis.
- Personalized interactive campaigns are a great way to reach out to communicate with patients and empower them to act on their care gaps.
- Remind patients of their connection with your business through automated appointment reminders and prompts for regular checkups.
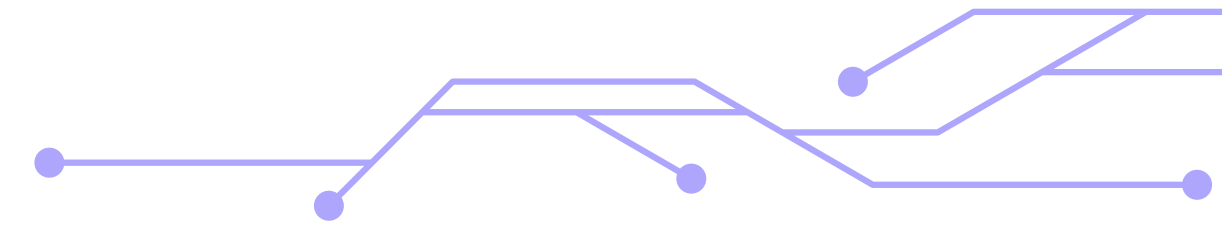
Measuring patient satisfaction is a crucial tool in improving trust. When customers are asked about their experience at key points throughout their journey, not only do they feel seen and heard, but organizations collect valuable data about how to further enhance patient experience.

Use digital patient satisfaction surveys as a way to improve your practice performance and identify the factors that matter most to the patients by constantly gathering additional feedback and data. Armed with this integral information, you can also identify any gaps and make improvements in areas that could lead to higher engagement levels.

***Must Have: A variety of tech-enabled tools can make patients feel seen, heard and connected with your organization, improving trust and engagement.***

Patient experience will be the separating factor between the healthcare organizations that succeed in 2023 and beyond, and those that fail.

In this new era of staff shortages, clinician burnout, medical consumerism, and increasing patient expectations—a digital-first approach is the only way to remain competitive.

**<u>To stay ahead of the competition</u>, healthcare leaders must focus on delivering simpler, more convenient, and more human-centric experiences tuned to the changing needs of people's lives.**

Finding a strategic tech partner who can build the necessary infrastructure and power patient experiences with intelligent automation will help healthcare organizations meet and exceed patient expectations across the healthcare journey and set themselves apart and up for success.

# Our Methodology

At Steer Health, our ecosystem consists of a variety of healthcare organizations, including, Prime Healthcare, Neurology Associates of Texas, Island Dermatology, OC Surgeons and more. For additional information, visit **steerhealth.io** or contact **hello@steerhealth.io.**

## Attract Better • Retain Longer • Grow Faster

# Steer Health

## Powering the Next Generation of Care Experiences

Founded in 2019, Steer Health is the leading Patient Experience and Growth Platform for healthcare organizations. Steer orchestrates digital patient journeys across all care settings for intelligent, personalized experiences to drive practice growth and stellar patient outcomes.

Steer Health provides a powerful suite of tools specifically built for healthcare's unique challenges and the clinical staff that uses them. Our patient experience and growth platform supports each stage of the patient journey ensuring each patient receives uninterrupted, more convenient and personalized care.

Visit Us at **https://steerhealth.io/**