



The Digital Healthcare Gap: STREAMLINING THE PATIENT JOURNEY

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The Digital Healthcare Gap: Streamlining The Patient Journey, a PYMNTS and Experian Health collaboration, examines consumers' increasing use of digital channels such as online portals to engage with their healthcare providers, what consumers consider the biggest digital pain points and how healthcare providers can address these gaps and improve patient care and satisfaction.

April 2022

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ACKNOWLEDGMENT
The Digital Healthcare Gap Report was produced in collaboration with Experian Health, and PYMNTS is grateful for the company's support and insight. [PYMNTS.com](https://www.pymnts.com) retains full editorial control over the following findings, methodology and data analysis.

Introduction

Consumers are increasingly turning to digital channels such as online patient portals to streamline communication with healthcare providers and the management of their care. Digital tools used for activities such as booking appointments, obtaining test results and making payments are becoming preferred — if not expected — especially among digital-first consumers.

Traditional methods of providing care and interacting with patients are still common, yet healthcare providers are pressed to address patients' needs for transparent and easy access to critical health-related information and the ability to perform patient care-related tasks via digital channels.

PYMNTS' research finds that patients report a number of key pain points related to finding healthcare providers and getting cost estimates in advance of care. Eighteen percent of consumers said selecting healthcare professionals and asking questions were problematic, and 15% reported difficulties when obtaining accurate cost estimates for appointments.

Healthcare providers that succeed in streamlining the patient journey through digital channels will be able to improve the patient experience, retain existing patients and attract new ones. Our data shows that 61% of consumers who are “very” or “extremely” interested in using patient portals would switch their healthcare providers if other providers made such portals available.

The Digital Healthcare Gap: Streamlining The Patient Journey, a PYMNTS and Experian Health collaboration, examines how healthcare providers currently interact with patients via digital channels such as patient portals. It also offers actionable insights into the gaps in healthcare providers' digital practices and how meeting patients' expectations for a seamless digital experience throughout the patient journey can increase engagement and improve care.

This is what we learned.

One out of five patients have scheduled appointments via digital channels in the last 12 months, with urgent care patients being most likely to do so. Our data finds that 17% of urgent care patients scheduled appointments via patient portals, 16% via practices' websites and 5% via text message. Family practice patients schedule appointments via patient portals more than other digital channels, with 15% doing so. Meanwhile, 5% use the practices' websites and 2% schedule via text message. At 7%, dental practice patients are the least likely to use patient portals to schedule appointments.

Fifteen percent of patients say that obtaining accurate cost estimates for appointments and procedures is a major pain point. Patient portals could prove to be a useful tool to provide patients with care estimates. Only 24% of patients say that portals make this feature available, however. Seventy percent of respondents find it “very” or “extremely” important to know the cost ahead of time, but only 44% of patients knew the amount to be paid in advance for their last appointment.

On average, 31% of patients say they use digital methods to find and select providers, with one out of 10 patients finding providers through online reviews or searches. Patients of urgent care physicians look for these providers via digital methods more than the rest, with 18% using online reviews and 20% using online searches. Still, 18% of respondents mention difficulties finding and selecting the specific professionals they need.

Two-thirds of consumers currently use patient portals, with millennials and higher-income consumers the most likely to do so. Our research also finds that 32% of nonusers of portals would be “very” or “extremely” interested in using one if their usual providers offered them. Thirty-eight percent of specialist and radiologist patients who are not provided portals have the greatest interest in using them. At 29%, patients of family practice doctors who do not use patient portals are the least interested.



THE DIGITAL POTENTIAL:

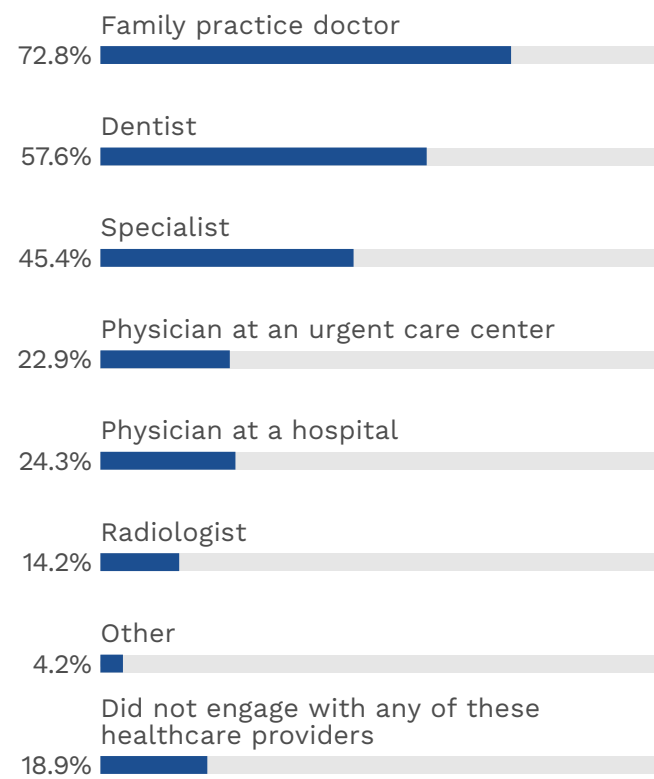
Using digital channels to streamline patient access to care

PYMNTS' research finds that 73% of patients who visited a healthcare practice in the last 12 months saw their family practice doctor, 58% of patients visited dentists and 45% saw specialists. Less than one-quarter of respondents visited a physician at a hospital (24%) or urgent care center (23%) and only 14% visited a radiologist.

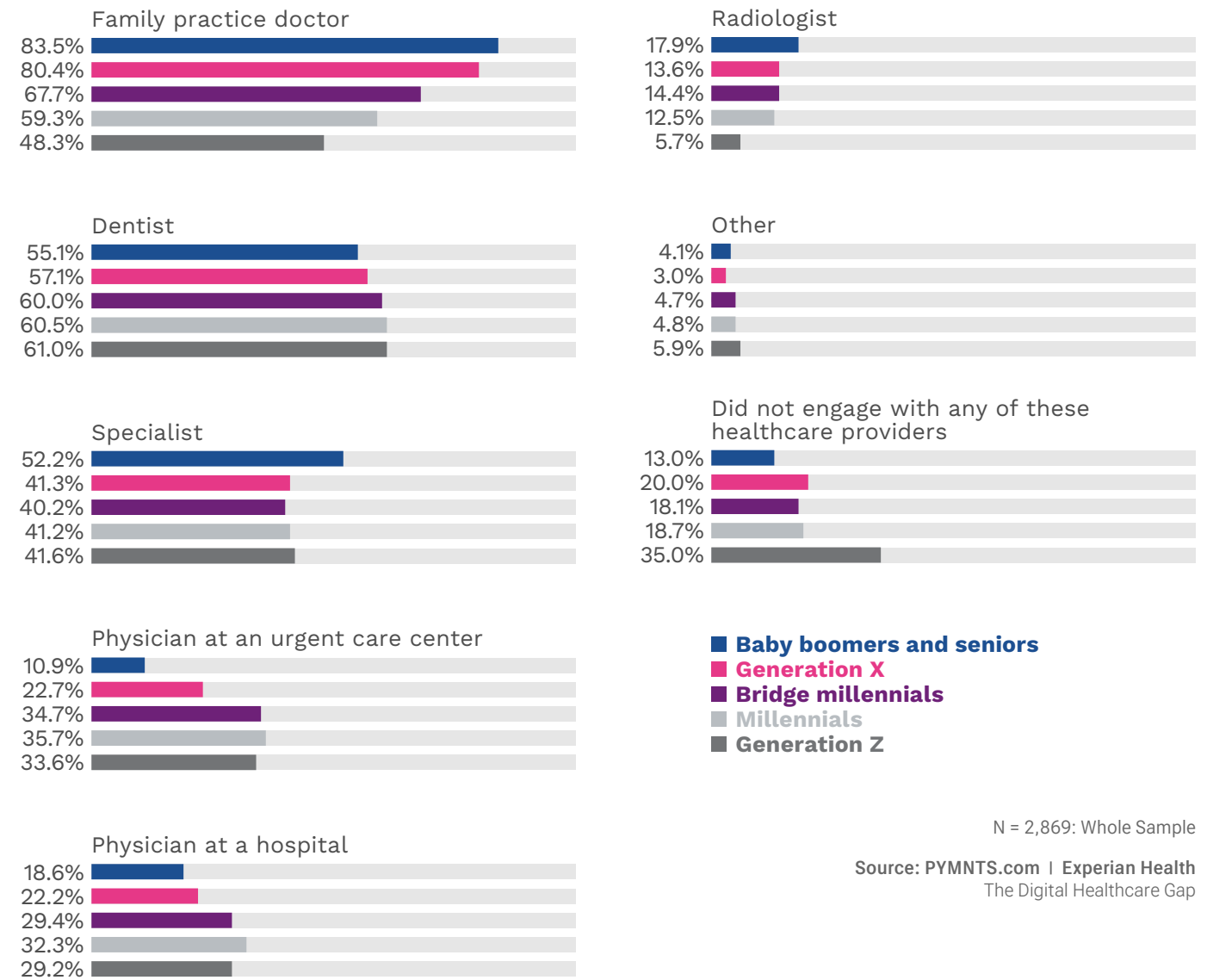
Baby boomers and seniors and Generation X patients were the most likely to use family practice doctors, at 84% and 80% respectively. Generation Z, millennial and bridge millennial patients were more likely to see urgent care or hospital physicians than older generations, with approximately one-third of each generation of consumers doing so in the last year. Just 11% of baby boomers and seniors visited an urgent care physician, while 19% saw a hospital physician. Close to two-thirds of all age groups scheduled dentist appointments. Only 8% of patients scheduled remote appointments, with family practice patients being the most likely to do so at 10%.

FIGURE 1:
Consumers' engagement with healthcare providers in the last 12 months

1A: Share of consumers engaged with healthcare providers, by physician type



1B: Share of consumers engaged with healthcare providers, by generation



■ Baby boomers and seniors
 ■ Generation X
 ■ Bridge millennials
 ■ Millennials
 ■ Generation Z

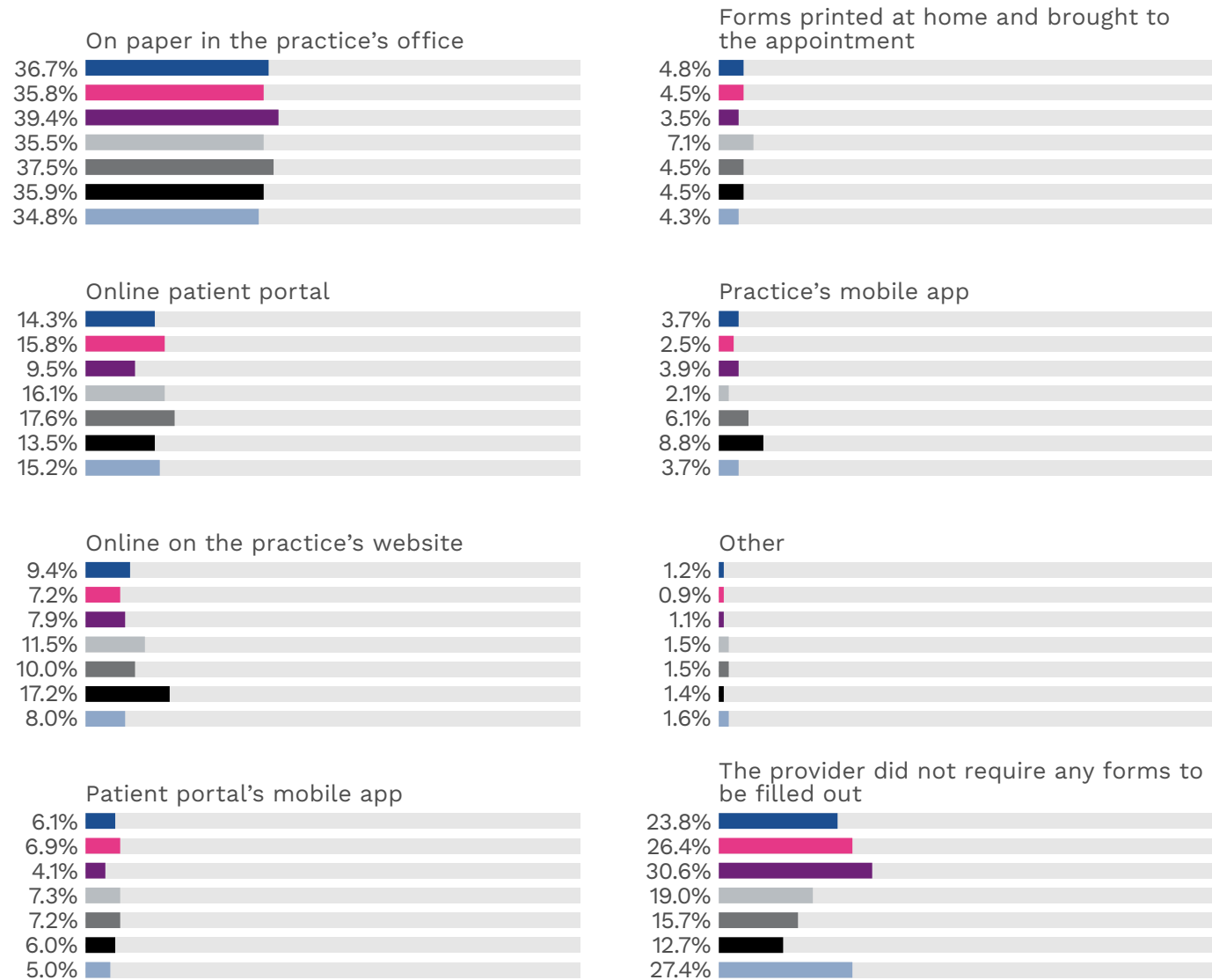
N = 2,869: Whole Sample

Source: PYMNTS.com | Experian Health
 The Digital Healthcare Gap

FIGURE 2:
Ways consumers filled out required forms with healthcare providers over the last 12 months

Share of methods consumers used to fill out required forms with healthcare providers, by type

- Average
- Family practice doctor (N = 1,741)
- Dentist (N = 1,352)
- Specialist (N = 1,099)
- Physician in a hospital (N = 514)
- Physician at an urgent care center (N = 470)
- Radiologist (N = 376)



Interacting with healthcare providers in the office or via phone call remain the most preferred methods for many patient care activities, from scheduling appointments and getting results to paying for patient care. However, patient engagement through digital methods is high for most activities during the patient journey.

For example, one-third of patients filled out forms for their most recent healthcare visit via digital methods, with hospital physician patients being most likely to use patient portals at 18%, and urgent care patients being most likely to use the practices' websites at 17%. Dental patients were the least likely to fill out forms via digital channels.

18%

Share of hospital physician patients who have used a patient portal to fill out required forms

N = 2,869: Whole sample
 Source: PYMNTS.com | Experian Health
 The Digital Healthcare Gap

17%

Share of urgent care patients who have used a patient portal to schedule an appointment

Our data also finds that one out of five patients scheduled appointments via digital channels in the last 12 months, with urgent care patients being the most likely to do so: 17% of urgent care patients scheduled via patient portals, 16% did so via the practices' website and 5% via text message. Family practice patients tend to use patient portals to schedule appointments more than other digital channels, with 15% doing so, compared to only 5% who do so via their practices' websites and 2% who do so via text message. At 7%, dental practice patients are the least likely to use patient portals to schedule appointments.

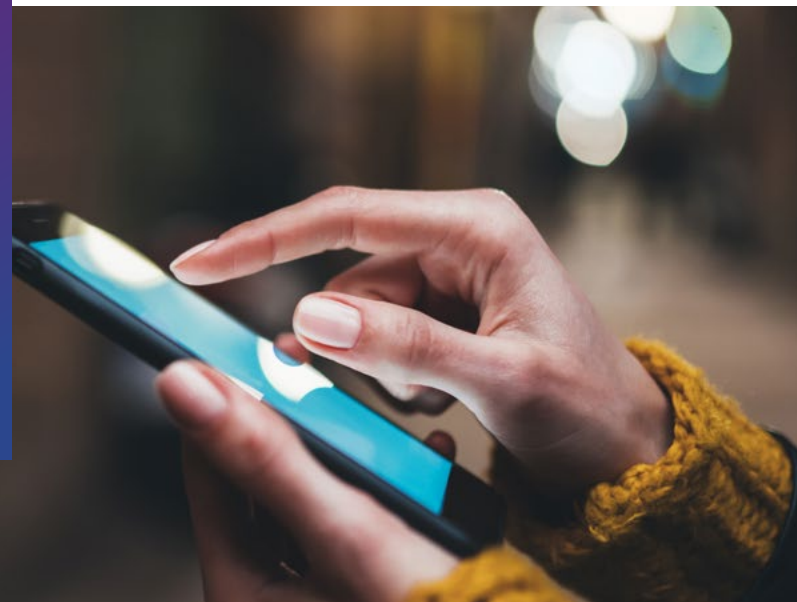
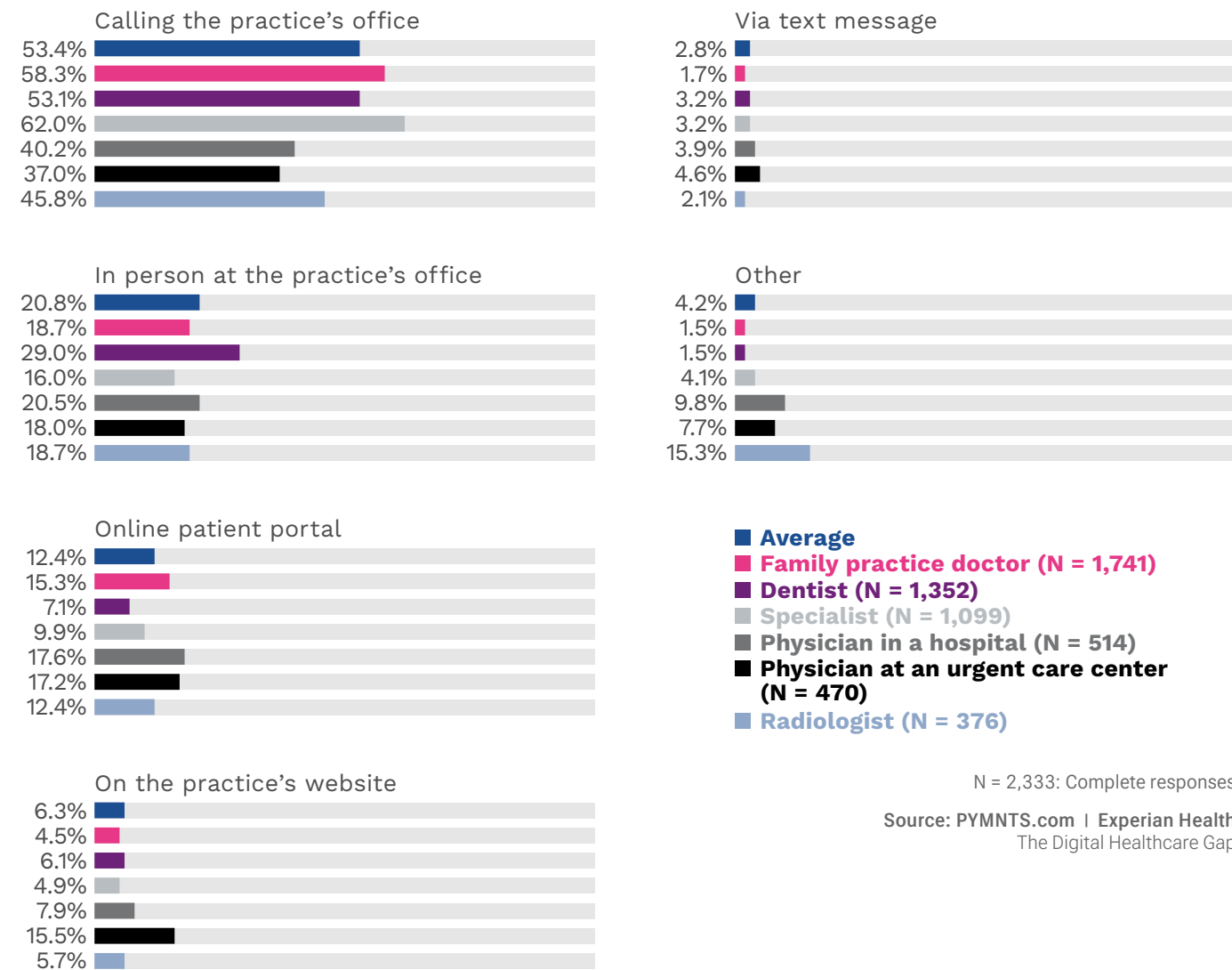


FIGURE 3:
Ways consumers scheduled appointments with healthcare providers in the last 12 months

Share of methods consumers used to schedule appointments with healthcare providers, by type

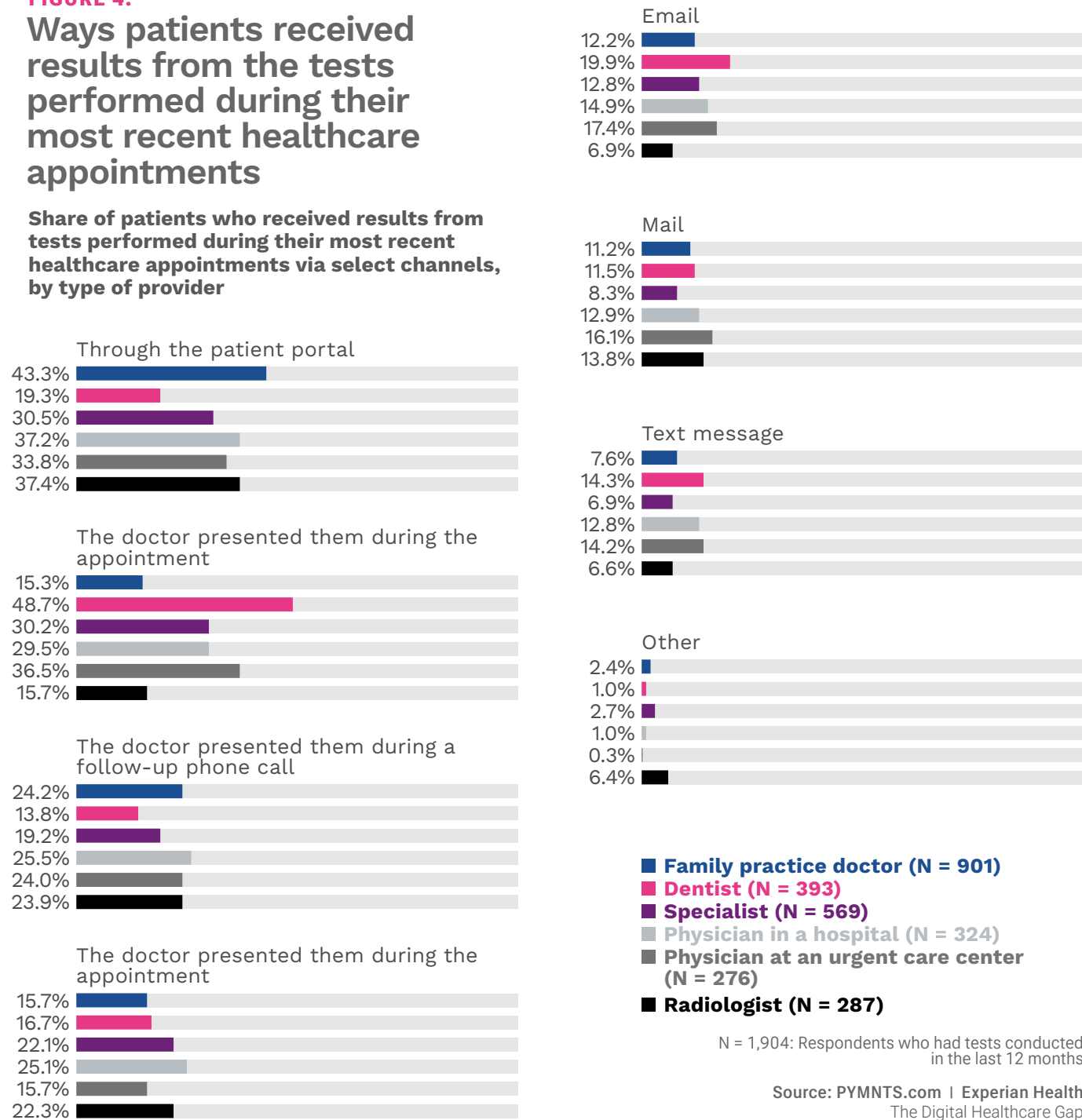


N = 2,333: Complete responses

Source: PYMNTS.com | Experian Health
The Digital Healthcare Gap

FIGURE 4:
Ways patients received results from the tests performed during their most recent healthcare appointments

Share of patients who received results from tests performed during their most recent healthcare appointments via select channels, by type of provider



The most common way patients received test results was through a patient portal, with 43% of family practice doctors presenting results via such portals. More than one-third of patients received test results via portal from radiologists or physicians at urgent care centers or hospitals. At only 19%, dentists were the least likely to release results via patient portal. Forty-nine percent of dentist patients still receive their results at appointments.

43%
 Share of family practice patients who have received test results via a patient portal

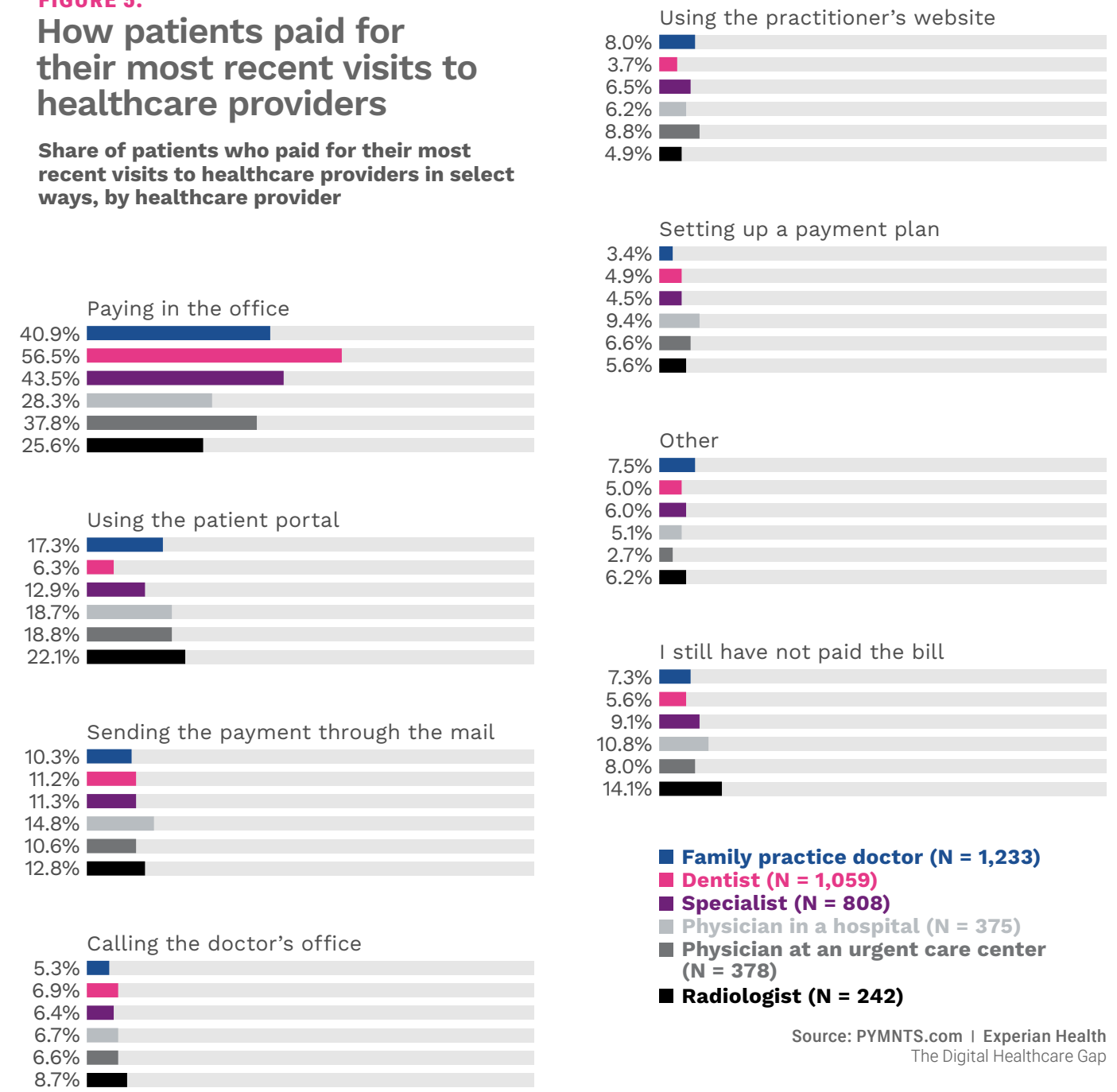
Paying for healthcare is increasingly done via digital channels. Our data finds that one-quarter of consumers used digital methods to pay for their most recent healthcare visits, with patient portals being the most common at 14%. Radiologists' patients were the most likely to pay via patient portal, with 22% doing so. Nineteen percent of patients of either urgent care or hospital physicians paid via patient portal,

and 17% of patients of family practice doctors did the same. Dentist and specialist patients were the least likely to use patient portals to pay for their most recent appointment. Websites are not popular channels for patient payments. Less than 10% of all patients use their practitioners' websites to pay for care, and 57% of dentist patients paid at the office.



FIGURE 5:
How patients paid for their most recent visits to healthcare providers

Share of patients who paid for their most recent visits to healthcare providers in select ways, by healthcare provider



Source: PYMNTS.com | Experian Health
The Digital Healthcare Gap



THE DIGITAL PREROGATIVE:

How healthcare providers can better engage patients

Almost 85% of all patients report being highly satisfied with their most recent care experiences, and more than half of patients are “very” or “extremely” interested in using digital solutions such as patient portals. Patients still face difficulties related to selecting professionals and receiving cost estimates before care, along with gaps between portal features they want and those that are available.

PYMNTS’ research finds that patients most commonly use providers they have used for a long time, yet 31% of patients, on average, say they use digital methods to find and select providers, with one out of 10 patients finding providers through online reviews or searches. The patients of urgent care physicians look for these providers via digital methods more than the rest, with 18% using online reviews and 20% using online searches. Still, 18% of respondents cite difficulties finding and selecting the professionals they need.

Fifteen percent of patients also say that obtaining accurate cost estimates for appointments and procedures is a major pain point. Patient portals could prove to be useful in providing patients with care estimates. Only 24% of patients say their portals make this feature available, however, even though 64% deem it important.

Our data finds that 70% of respondents believe it is “very” or “extremely” important to know the cost of care ahead of time, but only 44% of patients knew the amount they would have to pay prior to their most recent appointment. Just 6% of these patients were portal users whose portals grant them the ability to receive cost estimates for appointments and procedures.

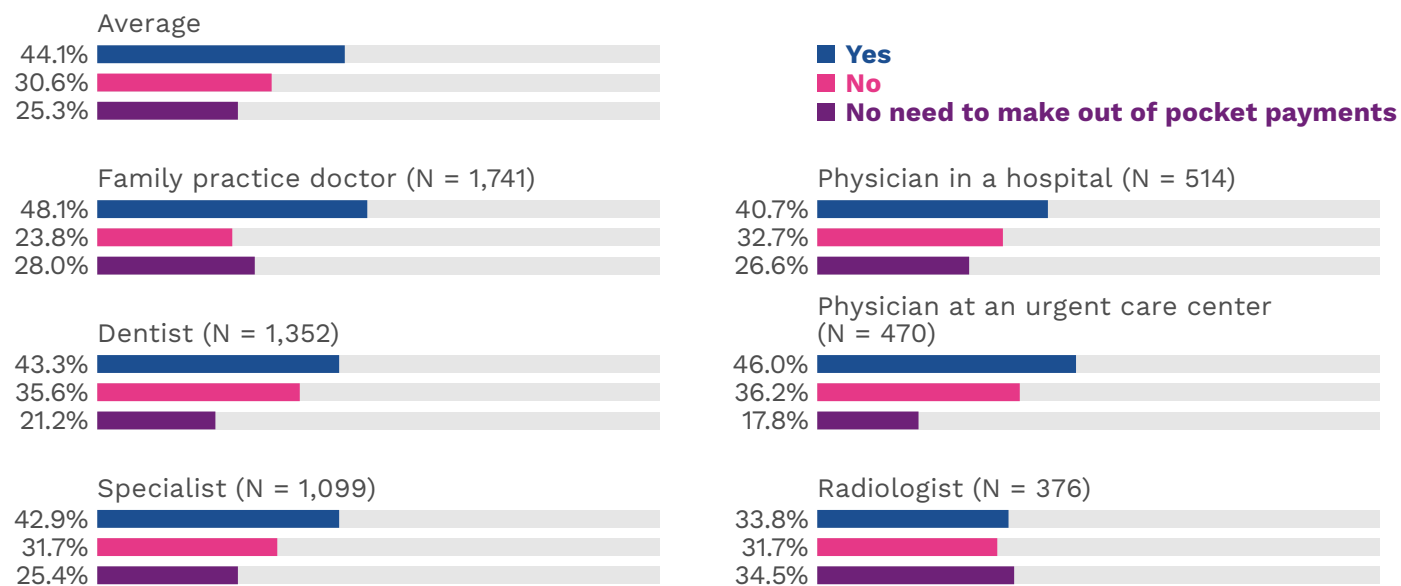
Twenty percent of these patients were not patient portal users, and 18% were portal users whose portals do not allow them to receive cost estimates.

Close to half of family practice patients (48%) and urgent care patients (46%) received cost estimates, but only 6% and 8%, respectively, were portal users whose portals enable them to receive cost estimates.

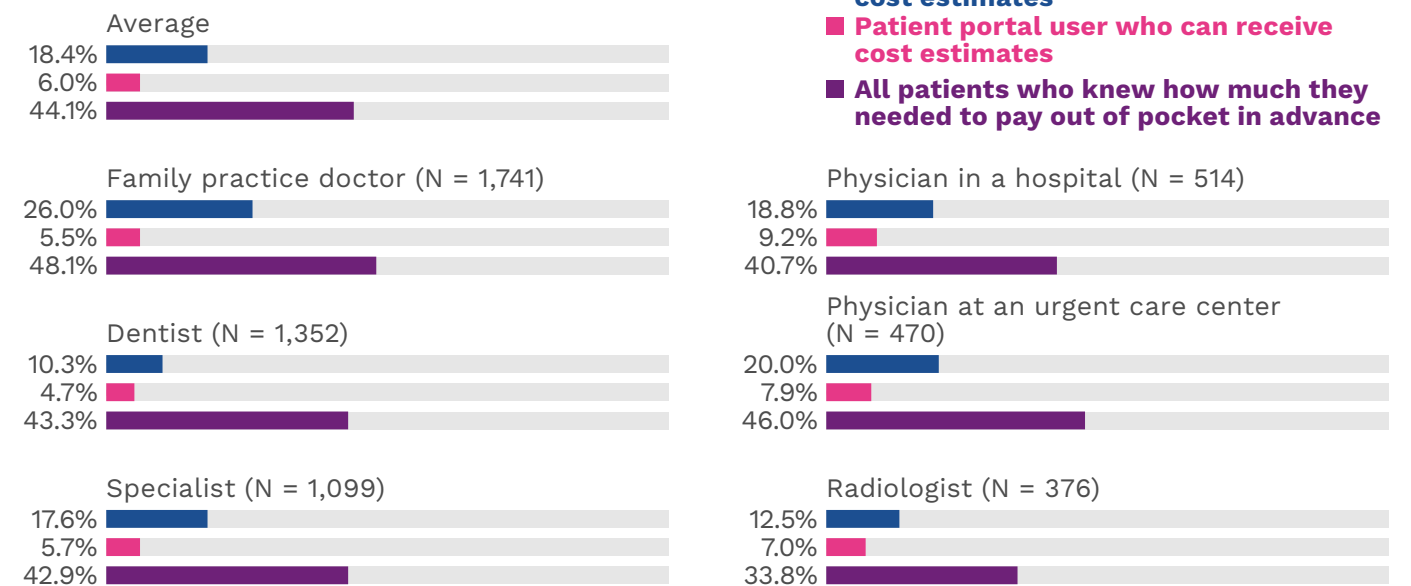
Thirty-one percent of patients did not know in advance how much they would need to pay out of pocket for their most recent medical visits. Just 36% of dentist patients, for example, received a cost estimate, and dental patients are also the most likely to not be portal users at 28%.

FIGURE 6:
Patients who knew in advance how much they would need to pay out of pocket

6A: Share of patients who knew in advance how much they would need to pay out of pocket, by healthcare provider



6B: Share of patients who knew how much they needed to pay out of pocket in advance, by patient portal usage and capabilities



N = 2,333: Complete responses
Source: PYMNTS.com | Experian Health
The Digital Healthcare Gap

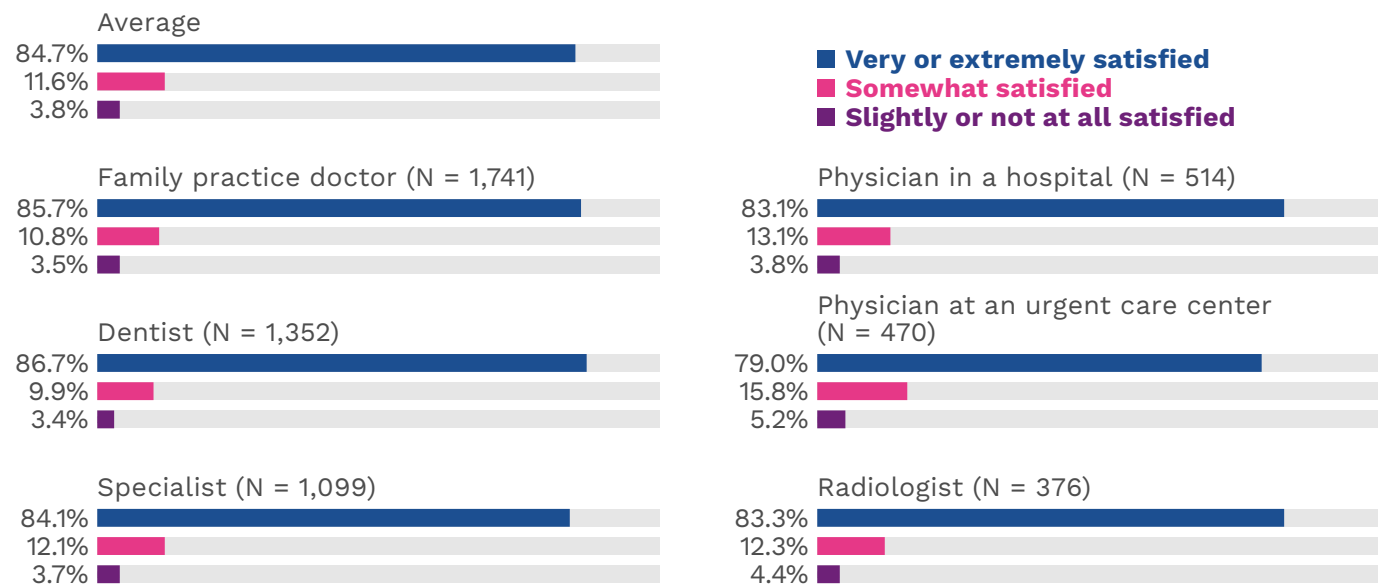
PYMNTS' data also shows a clear connection between patients' satisfaction with their healthcare providers and the ability to receive cost estimates in advance of treatment. Patients of dentists (87%) and family practice doctors (86%) who receive cost estimates prior to treatment are most likely to report being "very" or "extremely" satisfied.

satisfied. Conversely, if these patients did not receive cost estimates for their most recent appointments, they tended to be less satisfied. These satisfaction levels fell to 78% and 83% among dentist and family practice patients, respectively, who did not receive estimates in advance.

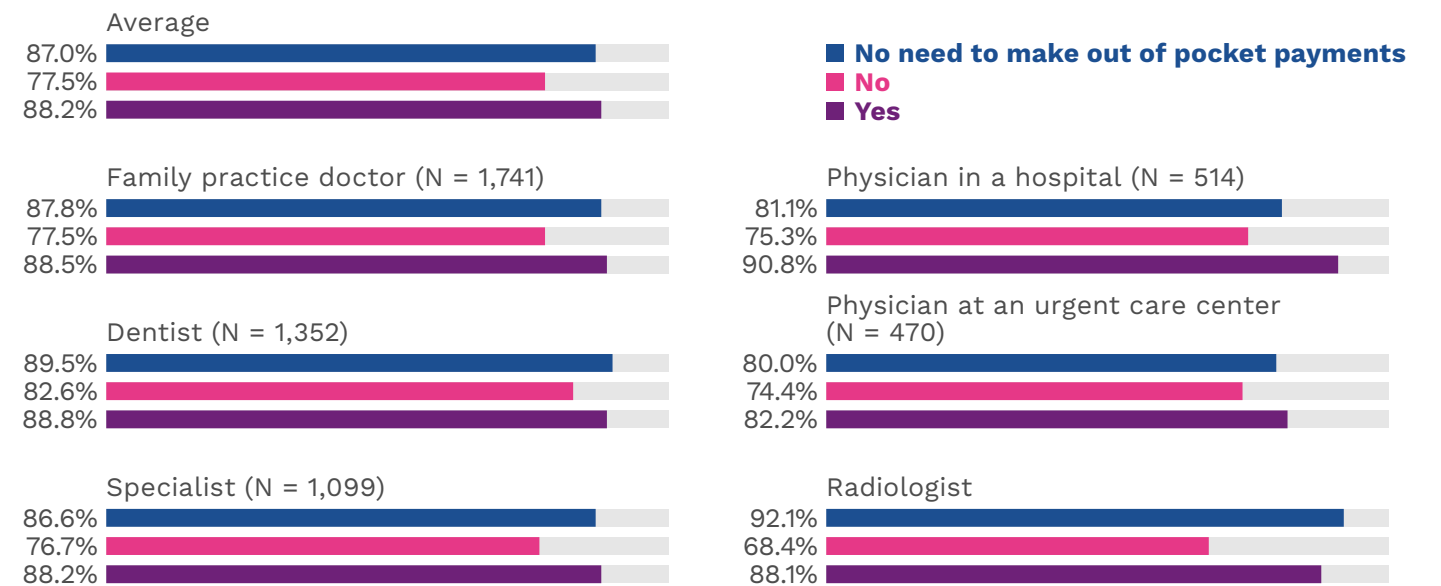
Interestingly, urgent care patients were the least satisfied with their care at 79%, yet 82% were "very" or "extremely" satisfied if they were able to obtain estimates in advance. The share of urgent care patients satisfied with their care dropped to 74% if they did not know how much they would have to pay out of pocket in advance.

FIGURE 7:
Patients' satisfaction with their most recent healthcare appointments

7A: Share of patients' level of satisfaction with their most recent healthcare appointments, by type of healthcare provider



7B: Share of patients "very" or "extremely" satisfied with their most recent healthcare appointments if they received a cost estimate in advance, by type of healthcare provider



N = 2,333: Complete responses

Source: PYMNTS.com | Experian Health
The Digital Healthcare Gap



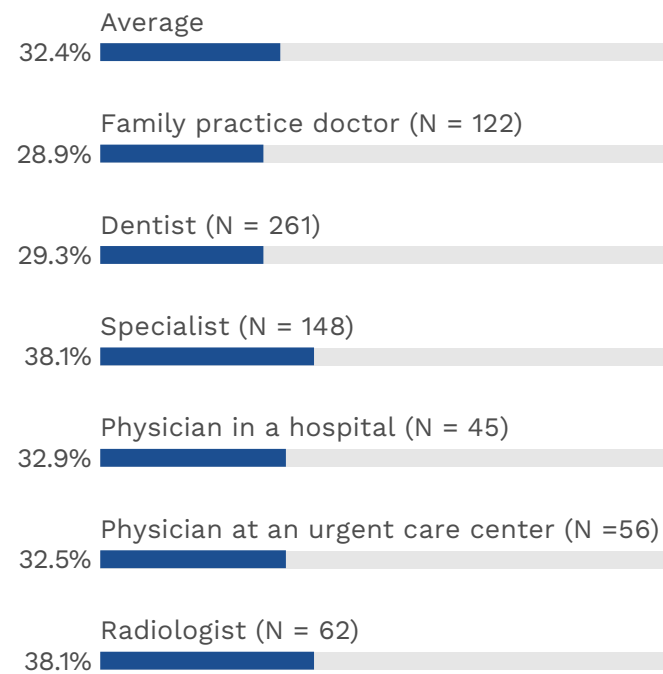
THE DIGITAL MANDATE:

How healthcare providers can better engage new and returning patients

Sixty-four percent of consumers currently use patient portals, according to PYMNTS' research, with millennials and higher-income consumers being most likely to do so. Meanwhile, 32% of nonusers of portals would be "very" or "extremely" interested in using a patient portal if their usual providers offered them. At 38% each, specialist and radiologist patients who are not provided portals have the greatest interest in using them.

FIGURE 8:
Patients “very” or “extremely” interested in using patient portals if their usual providers offered them

Share of patients who would be “very” or “extremely” interested in using patient portals if their usual providers offered them, by type of healthcare provider



N = 694: Respondents whose providers do not have patient portals

Source: PYMNTS.com | Experian Health
 The Digital Healthcare Gap

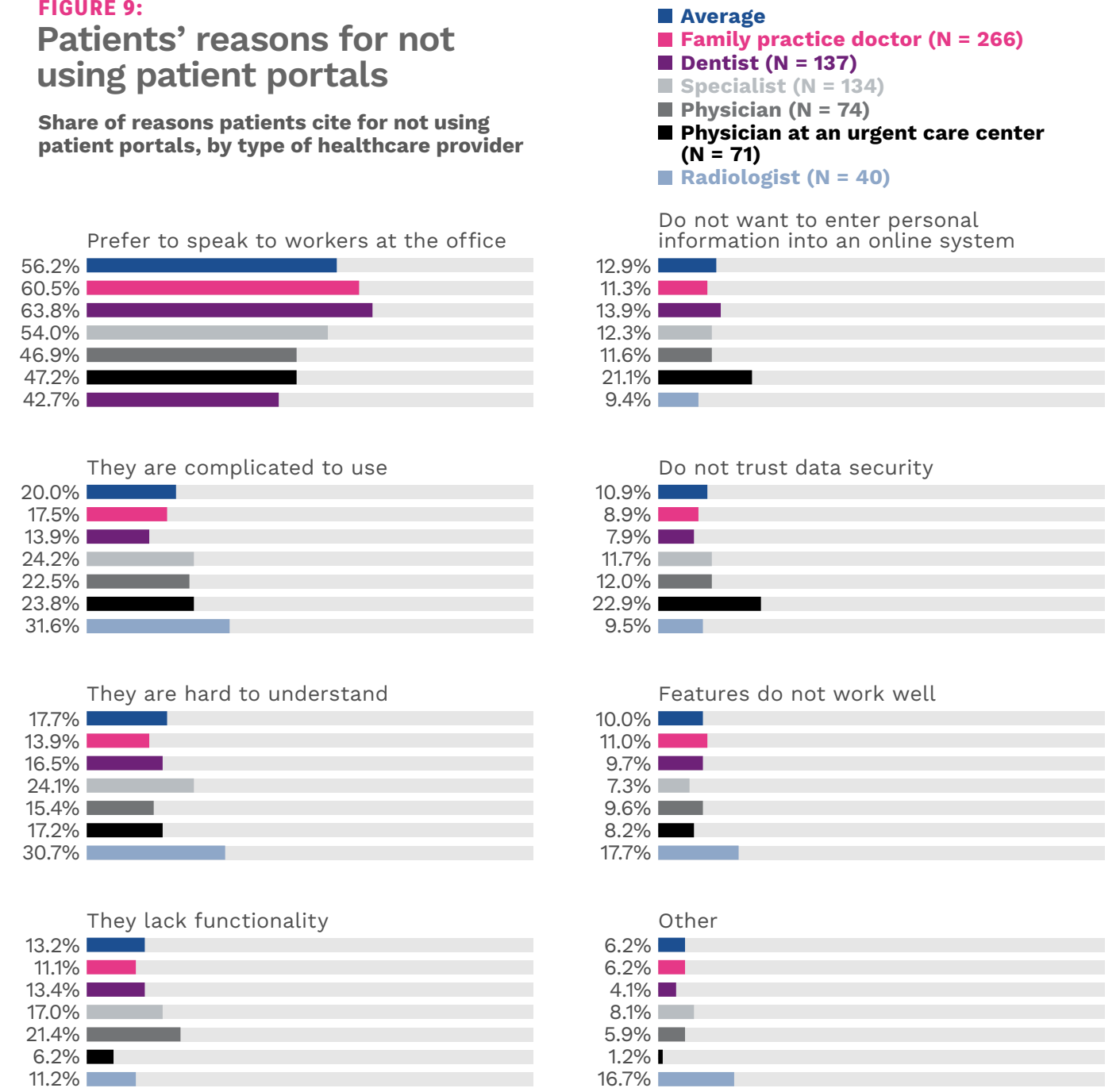
Patients of family practice doctors who do not use patient portals are the least interested at 29%. This is not surprising as these patients tend to be either Gen X or baby boomer and senior consumers rather than younger consumers, such as millennials, who tend to get care from urgent care centers. Thirty-three percent each of urgent care and hospital patients would be “very” or “extremely” interested in using patient portals if their usual providers offered them.

Our data also finds that more than half of patients who prefer not to use patient portals would rather speak with employees at the office, with patients of family practice doctors (61%) and dentists (63%) being most likely to say so. A deeper dive into other reasons patients prefer not to use patient portals indicates that many consumers are concerned about portals’ ease of use and functionality.

Twenty percent of patients say that portals are complicated to use, and 18% say they are hard to understand. Thirteen percent of patients say that portals lack functionality, with patients of hospital physicians being the most likely to cite this reason at 21%. Radiologist patients are the most likely to say that portals are complicated to use (32%), hard to understand (31%) and have features that do not work well (18%).

FIGURE 9:
Patients’ reasons for not using patient portals

Share of reasons patients cite for not using patient portals, by type of healthcare provider



N = 722: Respondents who have access to but do not use patient portals

Source: PYMNTS.com | Experian Health
 The Digital Healthcare Gap



Executive Insights

TOM COX
PRESIDENT



How can healthcare providers use technological innovation to better engage their existing patients and attract new ones?

Deliver convenience. People are consumers before they are patients. They may not be experts in medicine, but when it comes to convenient and efficient scheduling, registration, estimates, payments, communication and the flexible delivery of these services, the consumer becomes the de facto expert. Healthcare is quickly approaching the point where a standard of convenience and ease of use — primarily delivered via digital tools — will result in patient attrition for those failing to meet the standard. The 'innovation' needed is to reach parity with the experiences consumers have in their other service interactions.

As healthcare providers continue to adopt digital practices, what are the key challenges they face in meeting growing patient demand for convenient and streamlined experiences?

Getting patient-facing digital solutions up and running can be daunting. As consumers, we take something like scheduling for granted — it's how we get a restaurant reservation or a hair appointment or even donate blood. What goes on behind the scenes is pretty complicated, however. In the case of scheduling a medical visit, there are specific time slots, physician schedules, how to address cancellations and the need for referrals, among many other variables. Plus, the system has to work for specialists, too, and easily adapt to the addition — or departure — of new practitioners. And, scheduling should fit into the existing flow that includes registration, estimates and payment options. Associated with scheduling are reminders and other communication that follow on after an appointment is set, preferably with digital delivery as an option. That doesn't even get into the need for the scheduling service to work on a variety of platforms, both desktop and mobile. This is just one example of how challenging it can be for a healthcare provider to aggregate disparate data into a digital tool with a structure and interface that patients can easily engage with, and why solution partners like Experian Health are critical to help deliver a better patient experience.

What administrative frictions do patients encounter most during the patient journey, and how can digital solutions resolve these issues?

Any patient can name the top three: scheduling an appointment with a preferred physician or specialist, the 'waiting room experience' and accurate estimates for care — plus a convenient way to pay for that care. Having to schedule appointments by calling at exactly 8 a.m. when the office opens isn't convenient or efficient. Filling out paperwork that one has completed several times as a prerequisite to see a care provider aggravates just about everyone. And finding out how much the doctor visit and treatment costs long after the visit is complete is an experience unique to healthcare. There are likely more colorful descriptions than 'friction' that consumers would use to describe these experiences. Digital solutions can already solve these problems but that wasn't a priority for healthcare until we were impacted by COVID-19. The pandemic changed patient access significantly due to the need for 'touchless' and remote tools for scheduling, registration and even care. Those shifts are here to stay, and patient access stands to benefit from that. There is now much greater focus and priority to create a digital experience in healthcare similar to other service sectors — think retail, travel or food service — and the technology exists now to achieve that.



Conclusion

Healthcare providers looking to meet today's patients' needs for easy access to critical health-related information throughout the patient journey must incorporate digital functionality into their practices. Being able to use digital channels to schedule appointments and view test results helps minimize or remove administrative frictions that impact the patient experience, ultimately improving levels of patient satisfaction and care. Using technology to address key pain points, such as challenges in selecting the right professional and receiving cost estimates before an appointment or procedure, may require healthcare providers to partner with solution providers to enhance how they engage with new and existing patients.

Methodology

The Digital Healthcare Gap: Streamlining The Patient Journey is based on insights from a survey that was conducted between Jan. 30 and Jan. 31. We collected responses from 2,333 consumers to learn more about how they access healthcare services via digital channels and what they consider their most notable pain points. Respondents were 48 years old on average, 53% were female and 36% held college degrees. We also collected data from consumers in different income brackets: 36% of respondents earned more than \$100,000 annually, 31% earned between \$50,000 and \$100,000 and 32% earned less than \$50,000.

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