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Healthcare Consumer Digital Experience Analysis

2020

Executive Summary

For consumers, a hospital's or health system's digital presence can drive awareness and consideration of the care they offer, and how and where to receive that care. But when it comes to providing a seamless, integrated digital experience, hospitals are known to lag other industries.

A February 2020 analysis by Guidehouse and Centric Digital found health systems' digital acumen even further lags payers, retail pharmacies, and other healthcare disruptors – **the same organizations they're aggressively competing with for non-acute care market share.**

The analysis of 1,400+ hospitals' and health systems' digital presence, which used Centric's digital intelligence platform to measure consumers' digital experience, found that **90% of health systems' consumer digital experience scores were lower than the lowest scoring disruptor** across five disruptor types: online provider finders, innovative payers, health retailers, urgent care, and IT-enabled primary care.

The report focuses on the digital best practices that fall in the following stages of the consumer journey: **1.) Awareness** – Search engine optimization, safe browsing and communication, and site performance; **2.) Consideration** – Site usability and accessibility, mobile optimization, navigation usability, and content readability.

The lack of digital engagement expertise is **putting hospitals and health systems at risk of losing consumers to disruptors offering more routine, lower-acuity care.**

Examples Of Where Hospitals And Health Systems Are Lagging

Only 3% of health systems have public chat

Disruptors outperform health systems by over 140 points (34%) when it comes to search engine optimization for care needs

Only 35% of health systems publish an emergency department wait time on their websites, whereas **60%** of the top urgent care facilities publish wait times on their websites

Only 45% of health systems allow prospective patients to search for available appointment times/request appointment information without logging into a portal, compared to **75%** of analyzed healthcare disruptors

Consumers Expect A Better Digital Experience

Consumer research supports creating a standard for digital experiences that offers meaningful interactions across the patient journey. The healthcare cost burden will continue to drive consumerism in the future.

60% of consumers expect their healthcare digital experience to mirror that of retail.

80% of consumers used the internet to make a healthcare-related search in the past year. And it's not just younger generations, as **76%** of consumers over 60 made a healthcare-related search online in the past year.

63% of consumers will choose one provider over another because of a strong online presence.

81% of consumers will read reviews about a provider even after they've been referred.

67% of consumers over age 60 agree that availability of relevant and accurate information online has impacted their decision to seek one care provider over another.

61% of consumers consider ease of appointment booking to be a major factor in 5-star-worthy healthcare providers.

Sources: Doctor.com - Customer Experience Trends in Healthcare, 2018; NTT DATA Services

Leading Providers Are Investing In Digital

Leading hospitals and health systems are reducing live touchpoints and investing in digital solutions to become more convenient hubs for care. A provider’s website is key to acquiring new patients and building the kind of brand awareness and loyalty that keeps them coming back.

80% of hospital and health system CFOs believe digital transformation is critical for their organization's long-term survival and to continue to provide high-quality patient services.

Kaiser Permanente delivered **77 million** virtual visits last year.

Over **330** health institutions now support Apple Health Records, which enable patients to view important data such as immunizations, lab results, medications, and vitals directly in the Health app. (Up from 39 institutions in March 2018).

The majority of health systems leverage EHR patient portals or similar personal health record platforms to manage patient information.

Intermountain introduced a virtual hospital solution that offers **40+** services and has carried out more than **500,000** interactions.

Sources: Doctor.com - Becker’s Hospital Review, Apple, Black Book Research

Centric Digital's Digital Intelligence Platform

- Centric Digital's digital intelligence platform benchmarks an organization's digital capabilities against a library of digital best practices to help them understand their digital intelligence score and **compare their results against other organizations.**

- Scores are calculated utilizing a **consistent, proprietary weighting and scoring model** and can range from 0 to 1,000. **The more digital best practices met, the higher the score.**

- **Each digital best practice assessed** falls into a specific portion of the **consumer journey** to help organizations pinpoint the areas of the patient experience that are being impacted by lagging digital capabilities.

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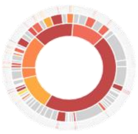
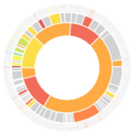


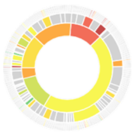
Lacking foundational digital capabilities expected by consumers

LAGGING
(200-399)



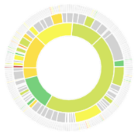
Meeting minimum consumer expectations for digital capabilities

PARITY
(400-599)



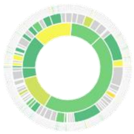
Users prefer digital solutions to traditional alternatives

LEADING
(600-799)



Beginning to integrate digital & physical experiences

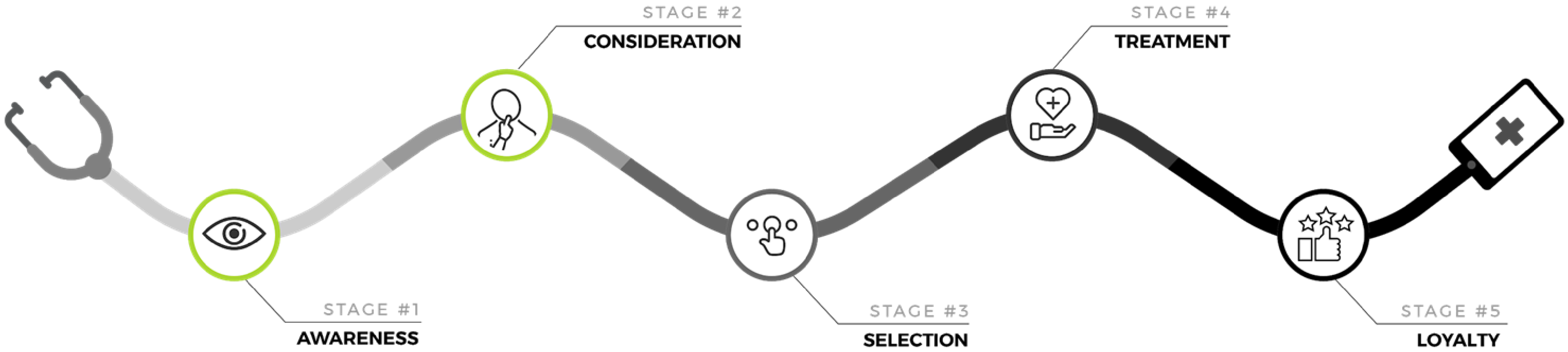
EXCELLENCE
(800-1000)



Blurs line between physical/digital, human/tech

Healthcare Consumer Digital Experience Analysis – The Consumer Journey

This report is focused on the digital best practices that fall within the “Awareness” and “Consideration” stages of the consumer journey. In addition, this report is focused on the table stakes digital best practices that have a high correlation to market-leading digital intelligence.



Awareness = The consumer journey begins with developing awareness of providers and the services they provide. Like any other industry, awareness is driven by digital capabilities around: **findability** *(e.g., SEO),* **safe browsing & communication** *(e.g., HTTPS), and* **site performance** (*e.g., homepage speed).*

Consideration = Once a consumer is aware of an organization, they will typically cross-shop with other providers as part of the consideration stage. Consideration is driven by digital capabilities around: **site usability & accessibility** *(e.g., screen size & device adaptability),* **screen & device responsiveness** *(e.g., mobile optimization),* **navigation usability** *(e.g., interaction design), and* **content quality** *(e.g., readability).*

Digital Capabilities Analyzed Across The Consumer Journey

PUBLIC | LOGGED-IN

Awareness

- **Findability** (e.g., SEO)
- **Safe Browsing & Communication** (e.g., HTTPS)
- **Site Performance** (e.g., Homepage Speed)
- **Patient Education Strategy** (Pre On-boarding with Simplified Clinical & Practical Content)
- **Interactive Health Information Tools** (e.g., Healthcare News, UTD Medical Reference Content, Live Web Events, Building Social Communities)

Consideration

- **Site Usability & Accessibility** (e.g., General Accessibility)
- **Screen & Device Responsiveness** (e.g., Mobile Optimization)
- **Navigation Usability** (e.g., Interaction Design)
- **Content Quality** (e.g., Readability)
- **On-Site Search**
- **Provider Finder** (e.g., Key Filtering Criteria)

Selection

- **Emergency Department Wait Times** (If Applicable)
- **Appointment Scheduling (Public)**
- **Live Chat (Public)**
- **Website Forms** (e.g., Form Field Best Practices)
- **On-Demand Digital Resources** (Medical Term Glossary, Support Program Information)
- **Personalized Cost Estimator** (e.g., Provider & Treatment Costs, Patient Reviews)
- **Caregiver Solutions** (e.g., Virtual Care Managers, Secure Patient Messaging, Digital Calendar Management)

Treatment

- **Appointment Scheduling (Private)**
- **Live / Secure Chat (Private)**
- **Telehealth** (On-demand Diagnostics and Services)
- **Pharmacy** (e.g., Medication Lists, Refills)
- **Patient Tracking Technology** (Data Transmissions on Patient Types, Visits, & Care)
- **Patient Education Strategy** (Online Educational Resources for Procedural & Medical Alternatives)

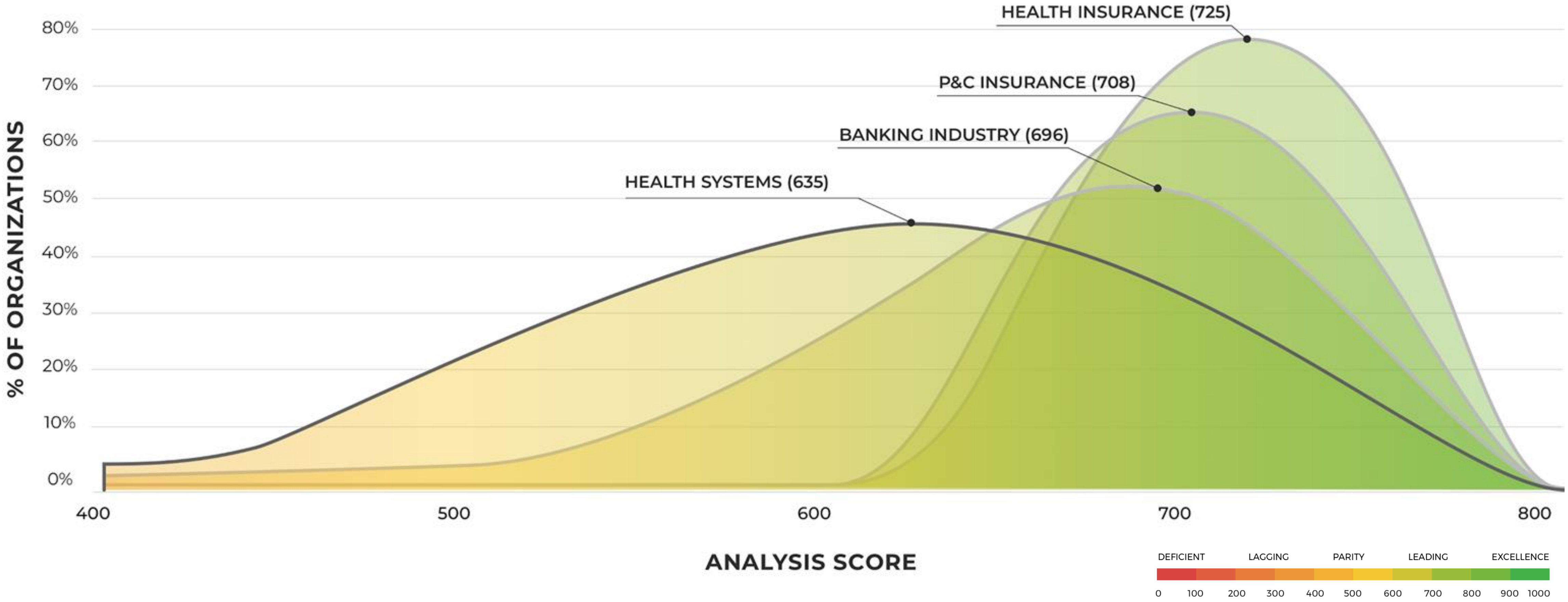
Loyalty

- **Alerts / Notifications** (e.g., Appointment Reminders)
- **Account Management** (e.g., Change Demographic Information)
- **Wellness Programs**
- **Health Records** (e.g., Access and Downloads Health History)
- **Mobile App** (e.g., Omnichannel)
- **3rd Party Technology Integration** (e.g., Connect Portal to Apple Watch)
- **Bill Pay** (e.g., Bill Pay Features)

Key Findings

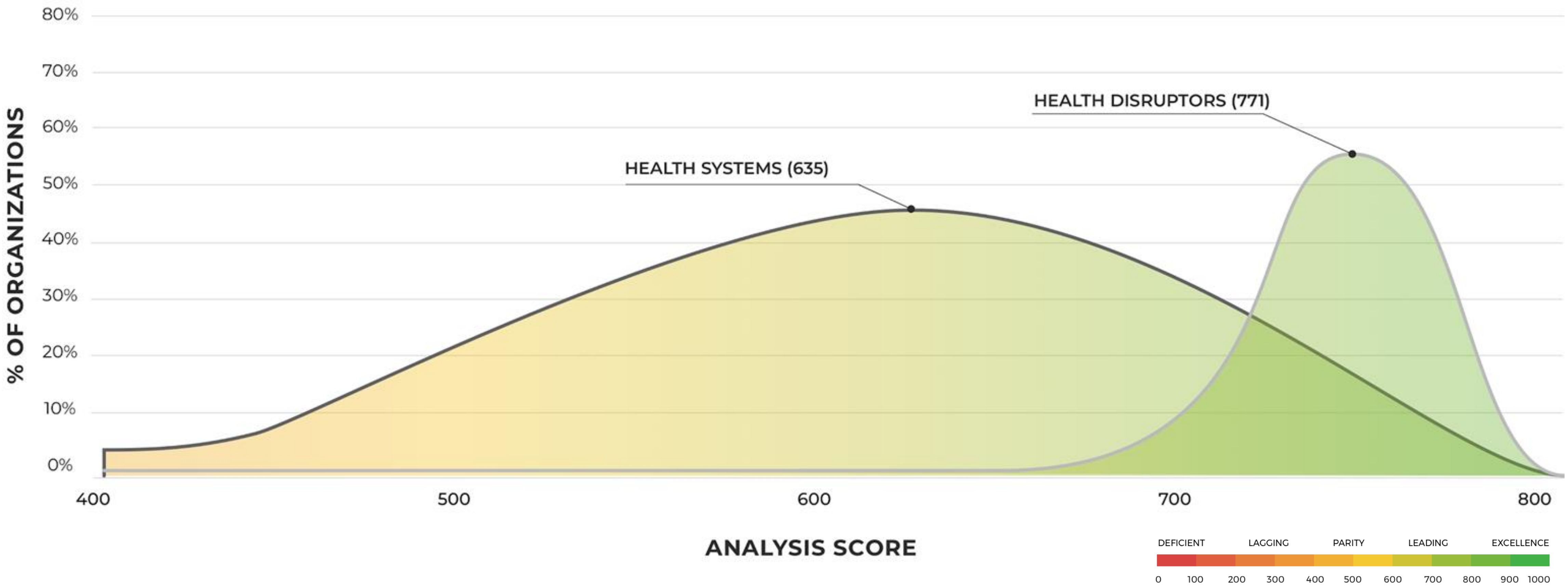
Health Systems Trail Similar Industries

The provider, banking, and insurance industries are "relational" industries focused on building long-term relationships with consumers vs. transactional industries where the focus is on winning a single sale with a consumer. However, health system digital scores lag these industries. **This is particularly true compared to health insurance, which is very digitally engaged with their members – the consumers hospitals are striving to digitally engage.**



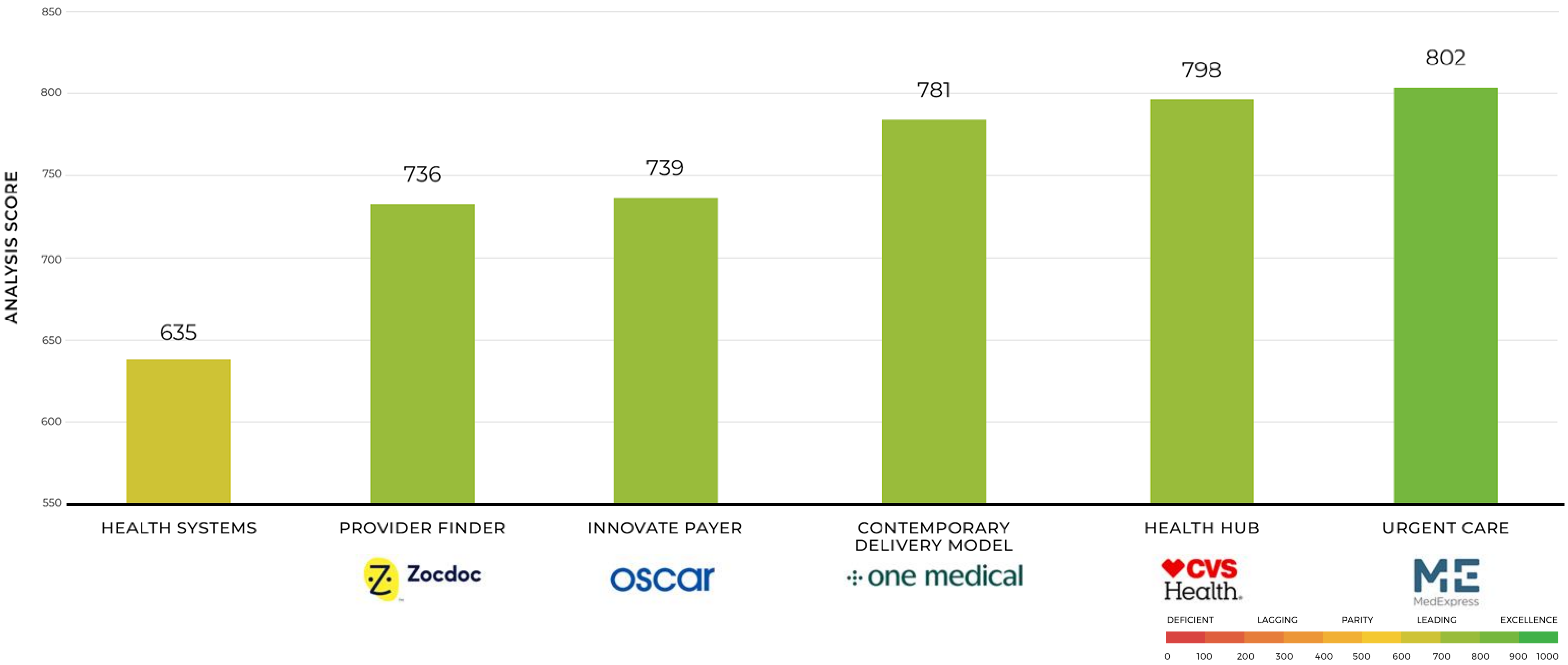
Healthcare Disruptors Lead In Digital Readiness

The analysis also benchmarked digital capabilities from new and expanding healthcare disruptors to produce a broader view of the industry's current digital state. **When compared against disruptors, health systems significantly lag their more progressive competitors who deliver innovative and consumer-friendly digital healthcare functions across all stages of the consumer journey.**



Disruptors Outperform More Than 90% Of Health Systems

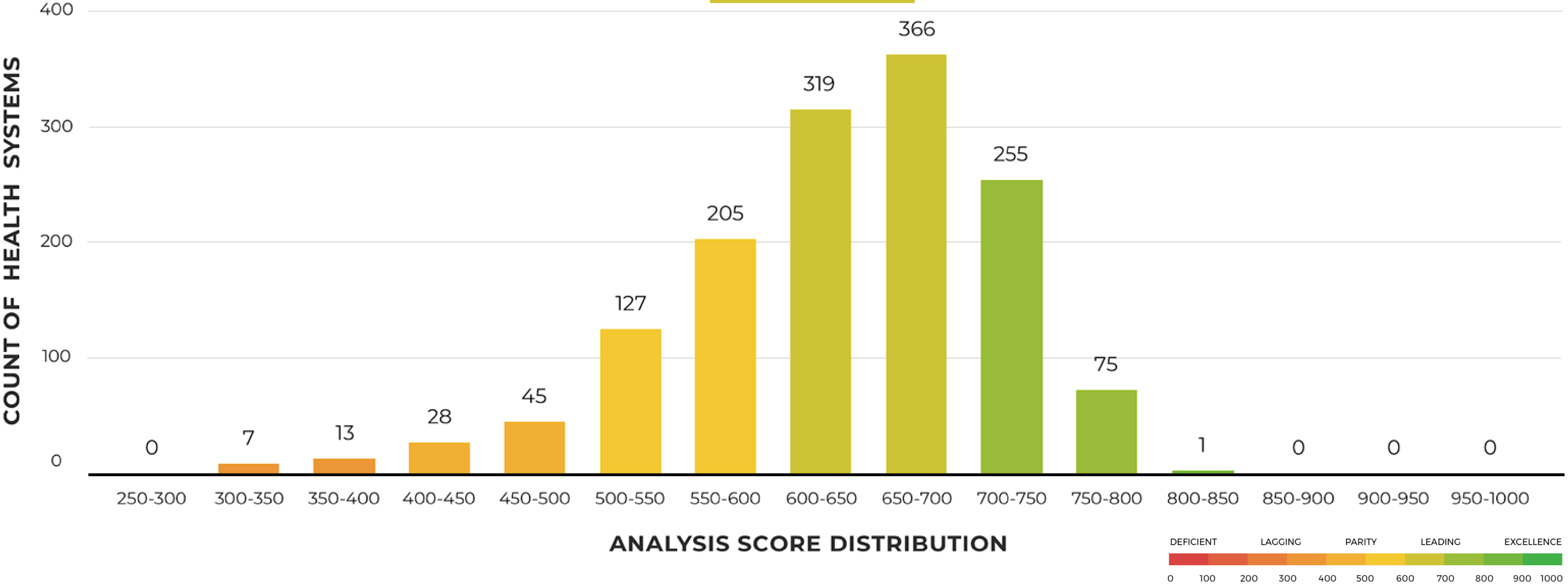
Innovative healthcare players have expanded and emerged in the past few years and are disrupting the traditional healthcare ecosystem by **providing consumer-centric digital solutions that simplify a consumer's healthcare journey.**



Health System Digital Analysis Scores

There is a **large variance in overall scores among the 1,400 hospitals and health systems evaluated,** with **an average overall score of:**

635



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Health System Scores Across Analysis Categories

Category	Category Definition	Stage of Consumer Journey	Avgage Health System Scores
Safe Browsing & Communication	The high-level parameters of a website that determine the overall level of protection it provides to users' data or actions.	Awareness	838
Screen & Device Responsiveness	The availability and ease of use of the same content when accessed through different mobile screen sizes and orientations.	Consideration	797
Site Usability & Accessibility	Features of a digital property that increase usability and accessibility.	Consideration	628
Site Performance	The speed with which the website loads, a key indicator of potential search engine ranking success.	Awareness	522
Navigation Usability	The ability to guide users so they can easily and intuitively identify available content and features.	Consideration	469
Content Quality	Mindful planning of the content (type, layout, quality) deployed in the digital property.	Consideration	461
Findability	Digital best practices that result increasing website traffic via search engine rankings.	Awareness	416

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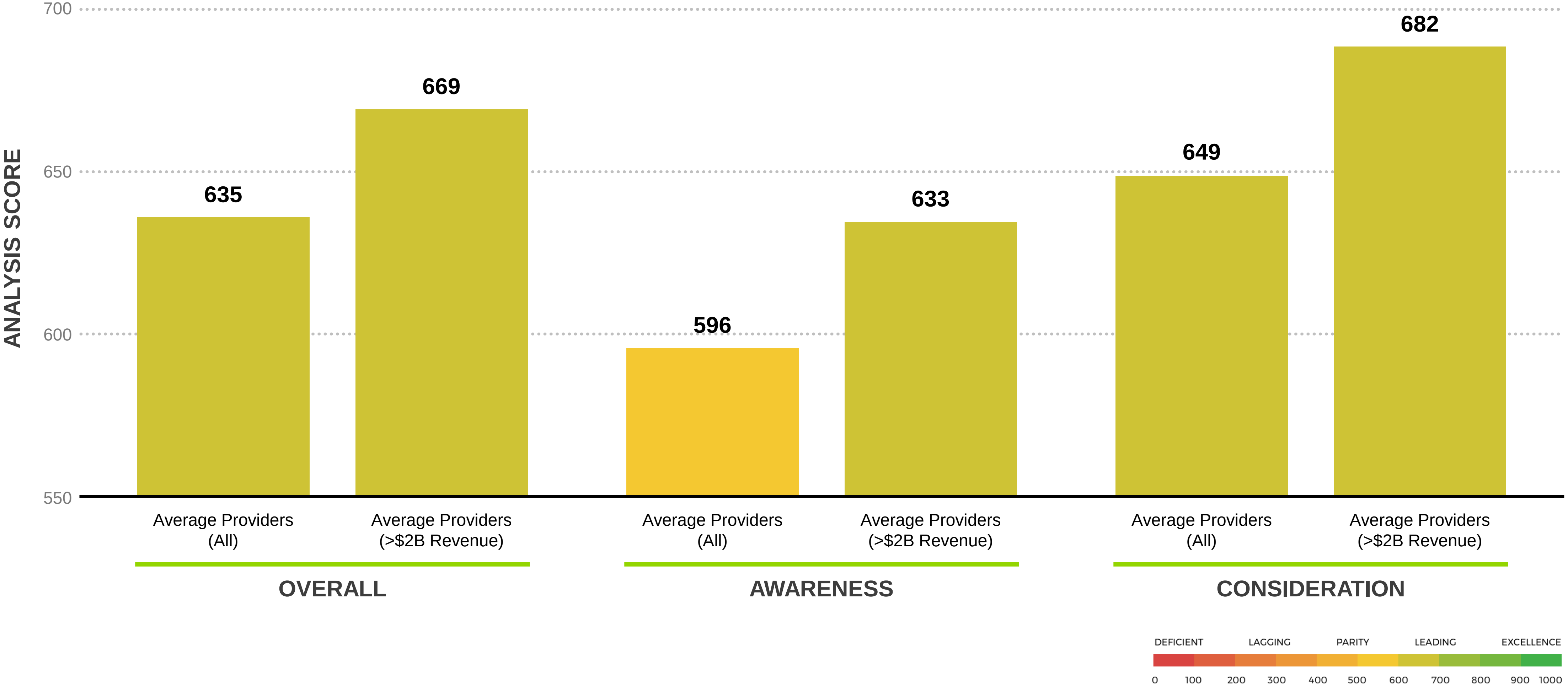
Larger Health Systems Perform Slightly Better

Health systems with a revenue size over $2B score slightly higher than the overall group average.



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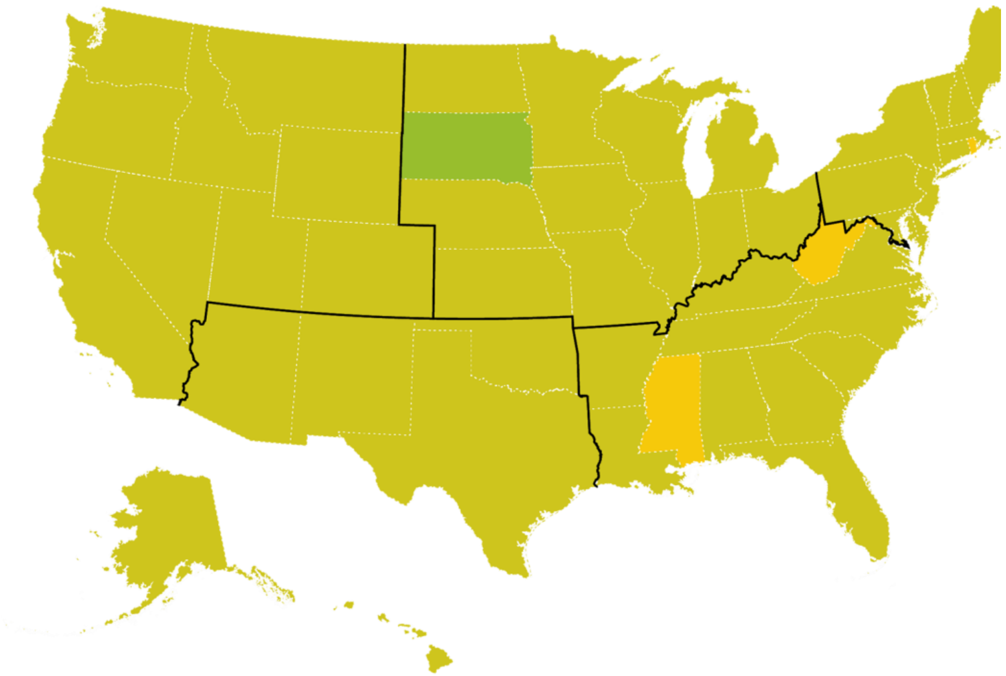
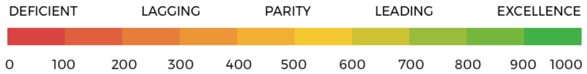
Digital Playing Field Is Borderless

Digital is disrupting regional competitiveness across industries. The resulting borderless, flat playing field has lowered barriers to entry and opened differentiation opportunities via digital consumer experiences. **Minimal variance exists when analyzing the average scores of hospitals and health systems with a state and regional lens applied.**

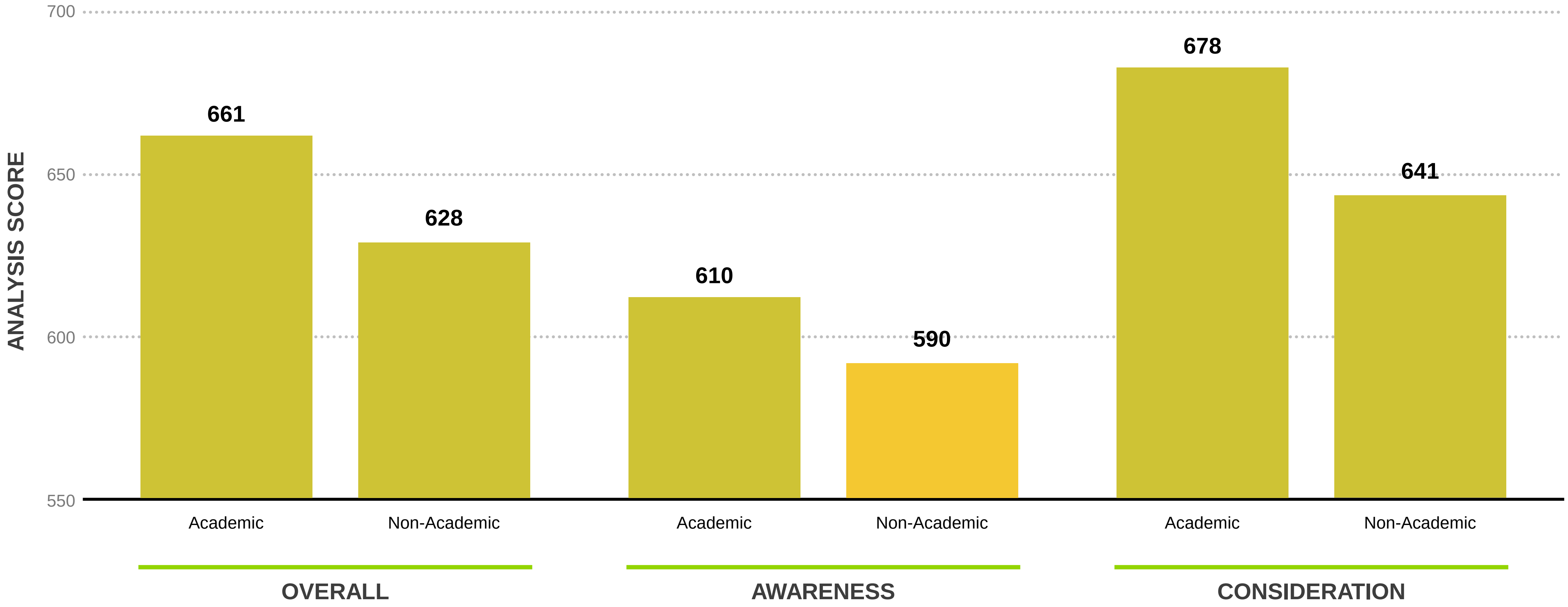


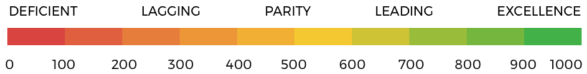
Region	Analysis Avg Score
Northeast	639
Southeast	633
Southwest	632
Midwest	624
West	622



Academics Slightly Outperform Non-academics

Academic health systems outperform non-academic systems in the analysis. Non-academic systems that have a significant territory of care may experience disruption, as prospective patients may gravitate towards providers that offer a stronger digital experience (e.g., academic systems).





Disrupting Traditional Care Models

What Disruptors And Leading Health Systems Are Doing Differently

Stage of Consumer Journey Impacted

Awareness

During the awareness stage of the consumer journey, many prospective patients utilize search engines to identify care options based on their medical needs.

Healthcare disruptors outperform hospitals and health systems by over **140 points (34%) when it comes to the "findability" aspect of the consumer journey.**

Consideration

As prospective patients consider care options, it's critical that providers offer functionality that allows website users to research specific providers.

Not surprisingly, health systems with higher analysis scores are over **3x as likely to offer a public-facing, provider finder/directory** to prospective patients.

Selection

Studies suggest that patients prefer consistent updates regarding their progress during an ED visit. In response, many EDs have begun communicating estimated wait times to the general public as part of their marketing strategy.

Health systems with higher analysis scores publish ED wait times almost **10X more frequently than systems with lower scores (55% vs 6%).**

Awareness - Best Practice Example

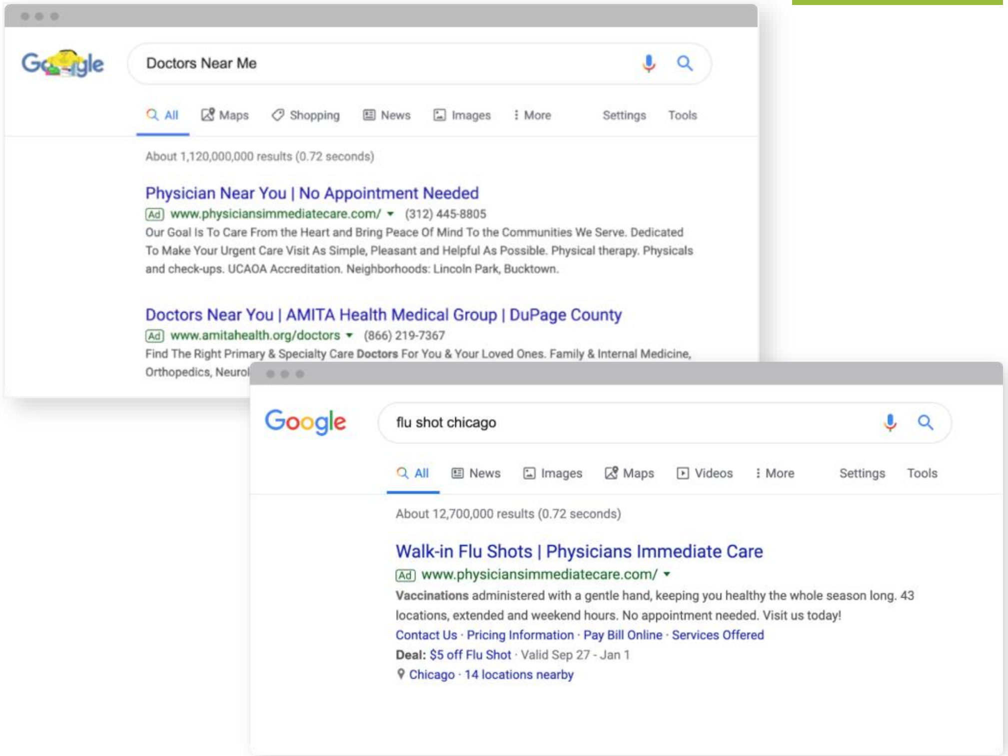
Building awareness of a brand is a critical step in establishing an organization’s digital presence. The proliferation of digital information and search engines has equipped consumers with endless online sources for researching symptoms and healthcare directories.

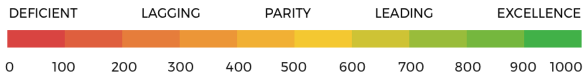
Best In Class Example

physicians immediate care

SCORE 764

- Urgent care facilities, such as Physicians Immediate Care, are investing heavily in SEO strategies to attract prospective patients to their facilities and away from traditional providers.
- Leaders maximize their SEO investment by providing prospective patients with quick links to their convenient approach to healthcare (e.g., pricing deals, locations, online payment, etc.) directly on the search engine result page.





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Awareness - Best Practice Example

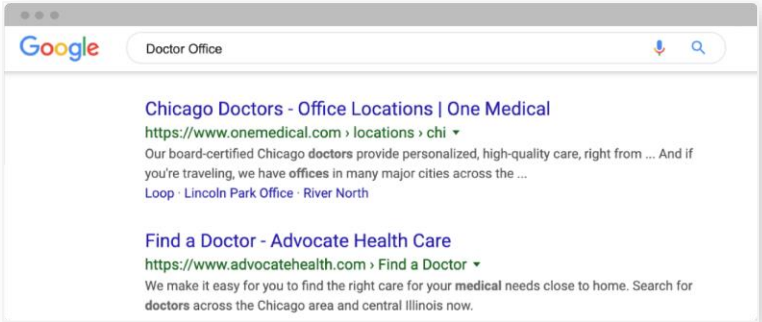
Building awareness of a brand is a critical step in establishing an organization's digital presence. The proliferation of digital information and search engines has equipped consumers with endless online sources for researching symptoms and healthcare directories.

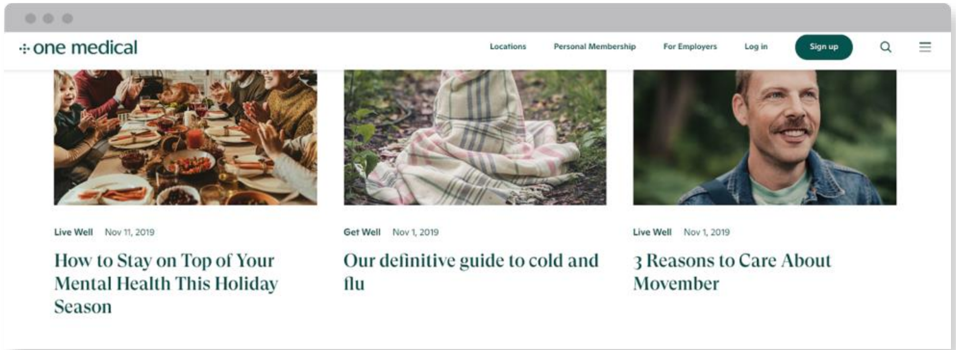
Best In Class Example

one medical

SCORE 781

- Newer health models, such as One Medical, are investing in SEO strategies in order to outrank providers in the awareness and consideration stages of the consumer journey.
- One Medical dedicates a section of their web channel to healthcare tips and information to both guide prospective patients and improve SEO rankings.





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Awareness - Best Practice Example

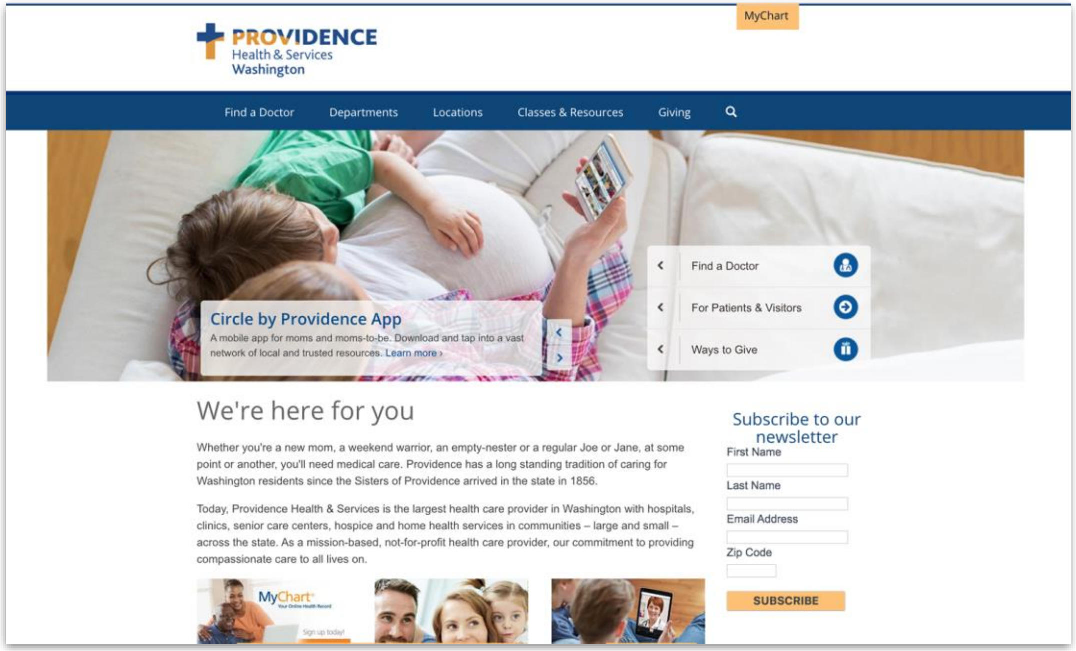
Building awareness of a brand is a critical step in establishing an organization's digital presence. The proliferation of digital information and search engines has equipped consumers with endless online sources for researching symptoms and healthcare directories.

Best In Class Example

PROVIDENCE Health & Services

SCORE 714

- When measuring the components that most impact page speed, Providence Health & Services (Washington) performed very well in server, JavaScript and image optimization
- Dimensions are specified for most images, eliminating the need for unnecessary reflows. Load times are also minimized as image sizes have been effectively selected based on where and how they are being displayed



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Consideration - Best Practice Example

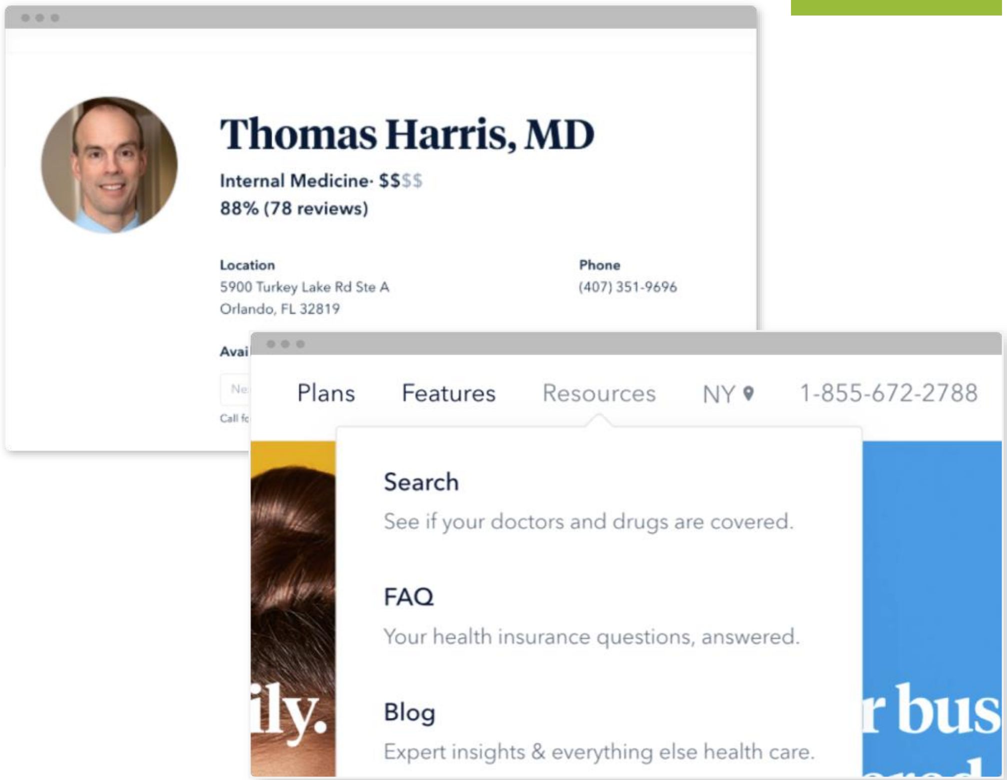
During the consideration stage of the consumer journey, consumers leverage multiple channels, like web desktop and mobile browsing, to learn more about the provider and potentially attempt to make contact with them.

Best In Class Example

oscar

SCORE 739

- An intuitive and clean user interface focuses the visitor's attention on the search call to action and allows prospective patients to browse the provider networks with a few clicks.
- Oscar provides complete physician profiles with images and detailed information about specialty, education, spoken languages, location, etc.



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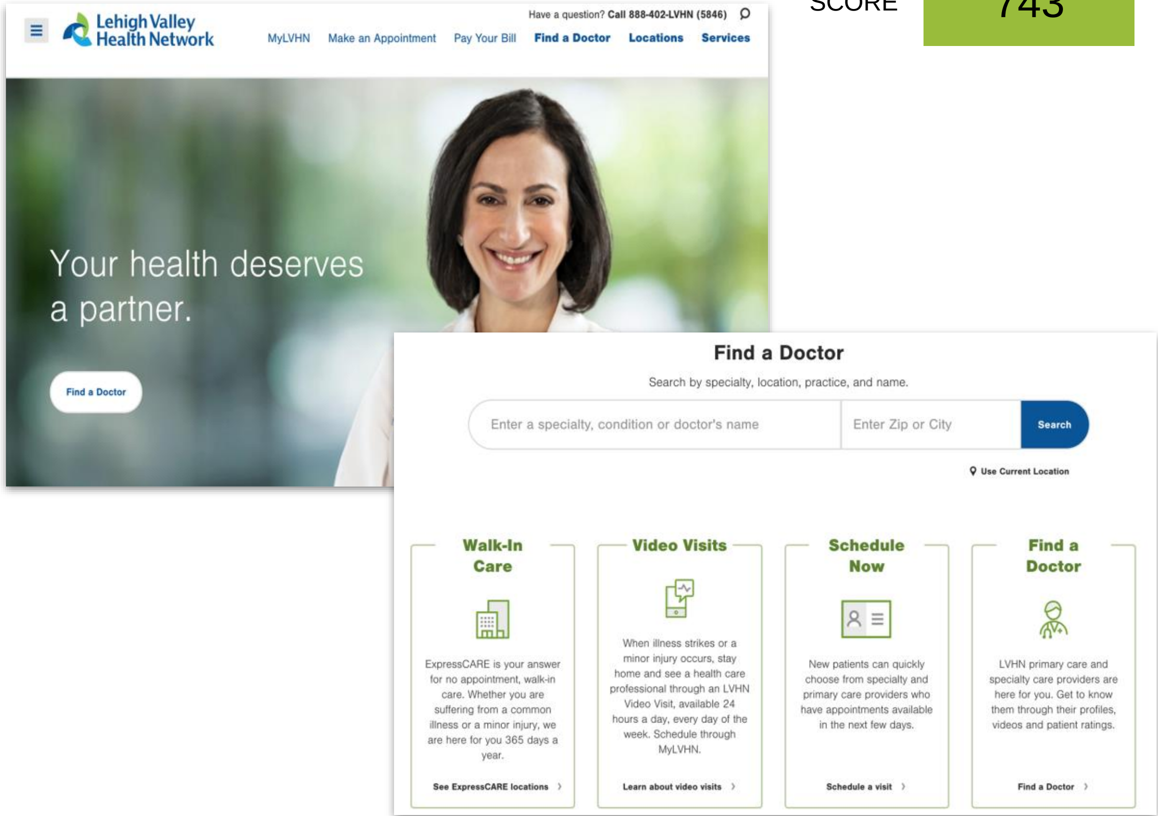
Consideration - Best Practice Example

During the consideration stage of the consumer journey, consumers leverage multiple channels, like web desktop and mobile browsing, to learn more about the provider and potentially attempt to make contact with them.

Best In Class Example

Lehigh Valley Health Network

- Lehigh Valley makes a strong first impression by presenting an uncluttered user interface with an obvious calls to action
- Users can easily navigate to more information based on their location and/or the type of appointment they'd like to make



SCORE 743

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Consideration - Best Practice Example

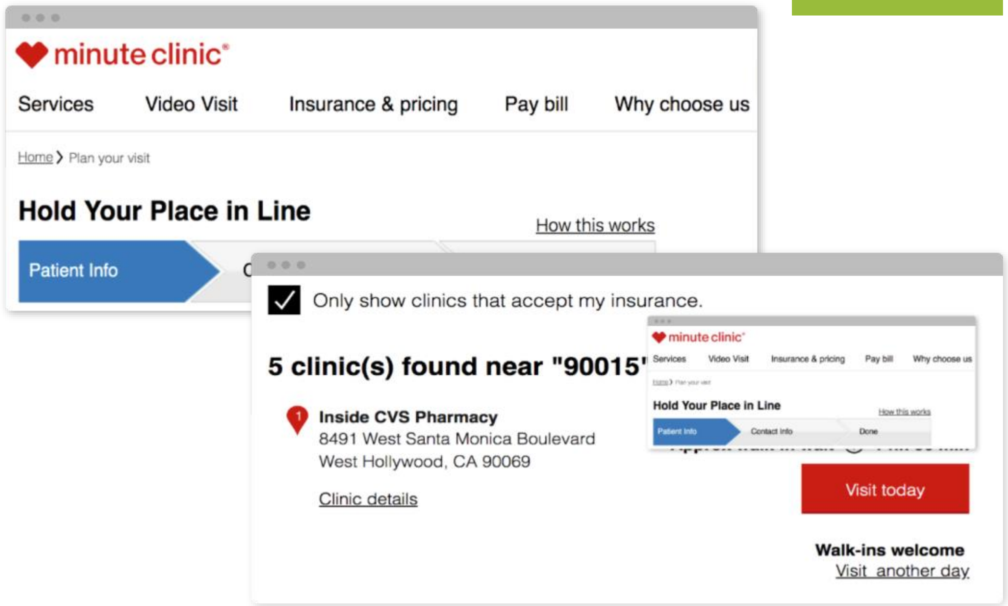
During the consideration stage of the consumer journey, consumers leverage multiple channels, like web desktop and mobile browsing, to learn more about the provider and potentially attempt to make contact with them.

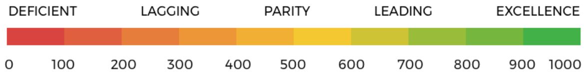
Best In Class Example

CVSHealth

SCORE 798

- CVS Health offers consumers multiple features to browse MinuteClinic options like interactive map, waiting time calculator, accepted insurance filter, etc.
- The site also allows users to easily make an appointment at their clinic of choice through three simple steps.





Selection - Best Practice Example

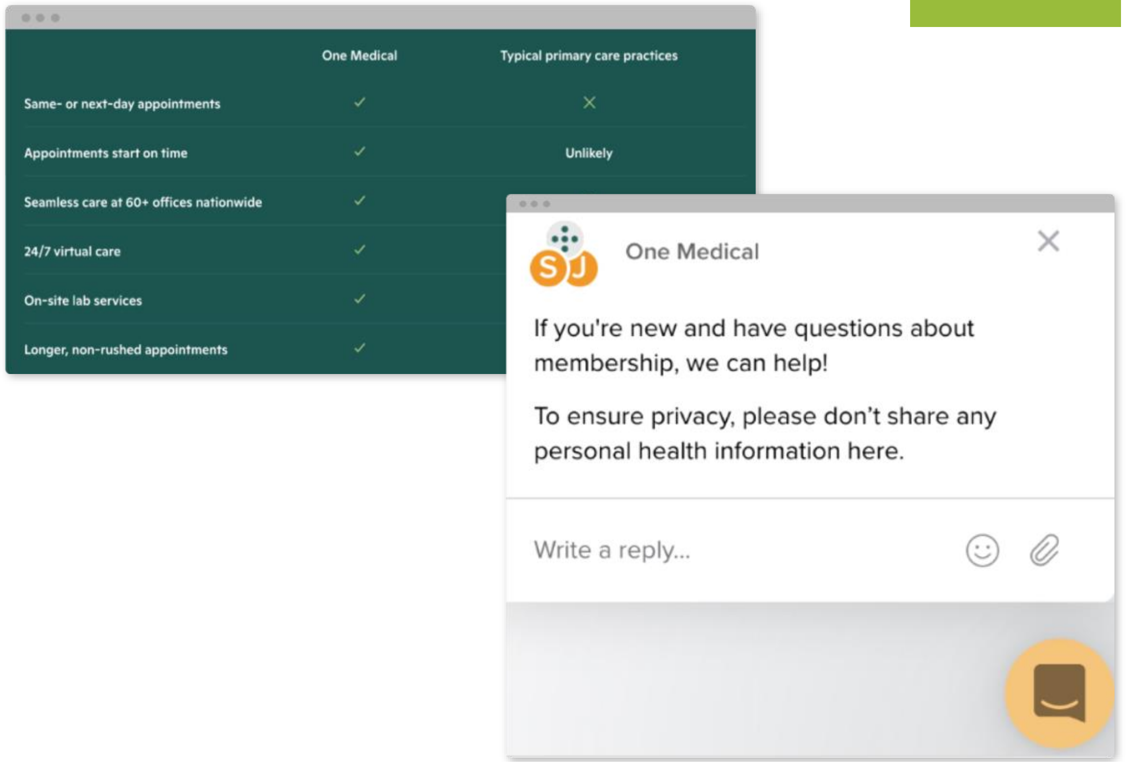
The selection stage in the consumer journey involves prospective patients interacting with different features and capabilities available to them. Providers that offer user-centric digital solutions for consumers will likely benefit from higher conversion rates.

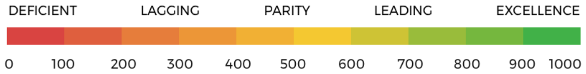
Best In Class Example

one medical

- Utilizes a simple user-interface to draw a visitors’ attention to very specific portions of the website (e.g., “Sign-Up”).
- Offers live chat capabilities with specific call-outs for prospective patients to immediately contact customer service.
- Utilizes comparison-style graphics to clearly illustrate their value proposition vs. traditional providers.

SCORE 781





Conclusions & Implications

Conclusions

Market Outlook

- Consumer experience is a new differentiator of superior performance for healthcare providers today.
- Motivated by ever increasing out of pocket costs and the proliferation of easy to use secure technology, consumers are more apt to “shop” for care as they shop for retail online.
- These market trends, along with increasing evidence linking improved consumer experience to enhanced clinical quality, operational efficiency, and financial performance, make a compelling case for hospitals and health systems to invest in consumer-centric strategies.

Consumer Digital Experience Analysis Results

- For consumers, a hospital’s or health system’s digital presence often drives awareness and consideration of the care they offer, and how and where to receive that care.
- According to an analysis from Centric Digital and Guidehouse, healthcare payers, retail pharmacies, and other disruptors are outperforming nine out of 10 health systems when it comes to providing a seamless, consumer-centric, integrated digital experience.
- While consumers will inevitably continue to visit hospitals for more specialized acute care, disruptors’ consumer-friendly digital acumen has them poised to gain primary care and other less-acute service market share.

Situation Analysis

Disruptors

- Most disruptors are digital natives that put the consumer first with all of their digital offerings across all stages of the consumer journey.
- Disruptors are not only seizing the consumerization of healthcare in providing access, convenience, choice, and price transparency for lower-acuity services, they are also reaching customers with Amazon-like capabilities built into their tools.

Hospitals and Health Systems

- For some hospitals and health systems, urgency around the digital consumer experience is not a priority yet.
- For providers that have implemented an EHR or have multiple call centers with different patient agendas, it is challenging to match the digital engagement drive of new and expanding healthcare disruptors – the same organizations aggressively competing with traditional providers for market share.
- This urgency is especially difficult to assign as operating headwinds are much easier to define than the financial benefit of digital investments to date.

Implications for Hospitals and Health Systems

- For health systems, the consumer experience should intentionally align quality, service, cost, and population health – all enabled by technology – to drive an organization's strategic objectives around consumer demands and expectations.
- Providers must consider how a digital operating model will drive value and improve caregiver and consumer engagement in a sustainable fashion – all while contending with operational headwinds and new competition.
- An impactful consumer experience strategy cannot be developed in the way hospitals traditionally think about care delivery – it must be developed from a consumer standpoint.
  - ✓ Health system leadership should look to more digitally advanced industries as models for their digital offerings.
  - ✓ Providers also need to revisit their access strategies and bolster their tools to both protect and grow their market and drive differentiation.
  - ✓ This includes rethinking how, when, and where they should be engaging with their patients.
- A key first step is to improve the digital experience of the patient journey.

Driving Value Through An Enterprise-wide Consumer Experience Strategy

Hospital And Health System Digital Strategies Should Be:

1 Aligned with Enterprise Strategy

- Successful organizations invest in systematic innovation while continually **measuring impact against enterprise strategic and long-term objectives.**
- Without this critical linkage, **investments tend to flounder, ROI is sub-optimized, and innovation activities get misaligned and eventually retired**.

2 Driven by a Robust Strategic and Operational Blueprint

- Health systems need to **treat digital assets the same way they have historically treated physical assets** and start with creating a robust “blueprint.”
- A true blueprint **avoids confusion caused by vendor proliferation** or a “bag of apps,” enabling desired value creation.
- **Operational efficiencies must be integrated with digital assets** to support ROI.

3 Continually Oriented Towards Action

- The leap from lab environment to full scale implementation cannot occur unless action is **ingrained into the DNA of systematic innovation efforts.**
- This requires A) selecting the **right operating model that fosters action** and B) rapidly translating **mature ideas into initiatives with funding and leadership commitment.**
- Workflow redesign must accompany all innovation efforts to optimize efficiency gains that result in quality, cost, and service enhancements.

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