WHITEPAPER

Omnichannel Healthcare Experience Report 2021

A national survey gauging patients’ preferences for receiving healthcare, communicating with payers and providers, and leveraging digital channels.
Executive Summary

The Omnichannel Healthcare Report is a national survey gauging patients’ preferences for receiving healthcare, communicating with payers and providers, and leveraging digital channels. In 2021, Avtex surveyed 1,025 healthcare patients representing the general U.S. population. Respondents were demographically similar to the U.S. population based on age, gender, income, ethnicity, and region. The data was collected via a web-based survey fielded by Qualtrics panels. Readers can assume a 3-5% margin of error depending on the respondent base in question.

This research yielded key findings in areas like mental health, delivery models, communication channels, and patient personas. Upon reviewing our findings, providers and payers will understand that in order to retain existing patients and members and attract new ones, they cannot ignore the rapid increase of experience-delivery channels, or the simultaneous expansion of various preferences that drive engagement in those channels.

Moreover, our broader goal was to understand how recent events such as the pandemic, entrance of retail incumbents into the healthcare market, and increased regulation around interoperability and price transparency has influenced patient preferences when it comes to receiving healthcare and communication from providers and payers.

Our research was designed to:

- Understand which communication channels patients prefer for different tasks as well as types of care
- Gauge preferred settings for care
- Explore innovative trends for at-home and virtual care
- Understand patients' greatest pain points with their current healthcare experience

Read on to uncover the key findings and discover how your organization can prepare to best serve patients in what we're calling Healthcare 3.0.
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Our Commitment to Understanding Patient Sentiment

Healthcare has seen unparalleled disruption over the last year. With COVID-19 serving as the major catalyst driving an elevated focus on patient experience and digital transformation, the landscape we are currently navigating is unfamiliar, and it is unlikely to ever go back to the way it was before. This is Healthcare 3.0.

When COVID hit, healthcare providers experienced a major patient volume decrease and mid-sized hospitals were losing up to $1,000,000 a day. Patients weren’t seeking out healthcare, and their hesitation to receive care impacted chronic disease management and the health outcomes of patients. In total, the healthcare industry lost over $200 billion dollars last year, according to data from the American Hospital Association.

While it was clear that patients were not leveraging healthcare as often or in the same ways as they had before, Avtex wanted to help healthcare providers understand patients’ pain points in greater detail.

We wanted to get a better understanding of their feelings and sentiments around consuming care and interacting in the face of COVID, so we could give healthcare organizations concrete takeaways and key steps for recapturing lost patients. In August 2020, we conducted our first patient sentiment survey.
These are the key takeaways from our original research report:

- As brick and mortar is no longer the only channel of delivery, healthcare providers must now engage patients with a multi-channel healthcare experience.

- There is no single patient profile that can be used to provide and deliver care – patient needs range widely across demographics including age, sex, ethnicity, and more. Understanding your patients, and tailoring to their journeys and their needs, is crucial to providing the best care and improving patients’ perception of your organization.

- Telehealth continues to grow as an alternative channel to delivering care. During the height of the pandemic, we saw a significant spike in telehealth use. Although this has dropped as the national new case rate for COVID has ebbed, telehealth will continue to be an important delivery channel in the industry.

In 2021, we launched a second round of patient experience research because we wanted to give our healthcare clients a framework for navigating a path forward as their business models enter the experience economy. It was also important to us to help providers recover financially, as quickly and effectively as possible, and help both providers and payers adapt to changing expectations in the post-pandemic era.

The key to successfully managing the experience economy in healthcare ultimately hinges on providers and payers having a clear understanding of their healthcare consumer expectations and preferences.

We are committed to understanding patient sentiment because we strive to provide the highest quality recommendations to our provider and payer clients. This research and similar efforts empower us to leverage insights in our healthcare customer experience engagements.
Key Findings

Across all age groups, mental health needs and utilization are increasing.

According to the [CDC](https://www.cdc.gov), in late June 2020, 40% of U.S. adults reported struggling with mental or behavioral health challenges. Further research by the [National Institute for Health](https://www.nih.gov) yielded that anxiety levels characterized as an anxiety disorder climbed from 8% of Americans in July 2019 to 36% of Americans in July 2020. Our research indicates similar results to the CDC and NIH, across the board. In the last 18 months, 26% of Gen Z respondents, 21% of Millennials, 15% of Gen X, and 6% of Baby Boomers have received mental health care. Healthcare providers should hire and onboard well-trained specialists, and ensure they are practicing empathy and understanding.

The proliferation of care delivery models continues, with methods like telehealth growing in penetration and sophistication.

COVID was the catalyst for an acceleration of investments in new methods of care delivery including phone, video, and at-home care. These methods will continue to have a place in modern healthcare long after the pandemic. While our respondents’ most common healthcare setting was a provider’s office, 38% of respondents have utilized telehealth in the past 18 months. Additionally, 51% of Millennials place telehealth in their top 3 methods of care. This is the natural progression of the digitization of business - it’s not a passing fad due to the pandemic. Telehealth is here to stay long after the pandemic tapers off and will be a foundational pillar moving forward.

The live, human element is not going away.

When communicating with their healthcare provider, consumers generally prefer talking on the phone or in-person visits – 62% prefer calling and 50% prefer on-location communication. For Baby Boomers, the human element remains even more critical, with younger generations being more interested in new and emerging channels. If human-to-human interaction, whether face-to-face or over the phone, is not possible, providers must consider amplifying the human experience through UI, UX, and CX. In both payer and provider environments, ease of use was noted as a barrier to communication.
Healthcare providers and payers should develop a communication strategy that is not “either/or”, but rather “AND” – omnichannel is the expectation.

You cannot successfully connect with your patients and members if you are not playing in all traditional and digital channels. Each channel, whether it’s a bot, chat, text, email, in-person, or other channel, serves a unique purpose across the patient journey. It is paramount that healthcare providers and payers have a plan for every channel and simplify service as much as possible. This omnichannel approach is even more important for younger generations. You must develop an understanding of your patients’ and members’ channel preferences and deliver service that meets those preferences.

Segmenting, understanding, and supporting your audience’s needs and preferences is more important than ever.

Leading healthcare providers and payers understand that there is no single patient profile. Understanding your audience – their demographics, needs, preferences and behaviors – is key to delivering exceptional customer experiences via an omnichannel approach. For Baby Boomers, consider doubling down on traditional channels; they want to interact with a human they have known for years, a personalized experience that ensures their provider knows them and values them. For younger generations, focus on convenience; Gen Z and millennial respondents are open to whatever care is most convenient, including telehealth, urgent care, retail, and at-home care.

In both payer and provider environments, ease of use was noted as a barrier to communication.

As patient and member preferences evolve, providers and payers can redefine how they serve their patients. Consumers want easier healthcare experiences. 71% of patients said they want their experiences with healthcare providers to be as easy as their brand interactions in other industries. Compounding the issue, 68% of respondents said their healthcare providers need to improve how they interact with patients.
Healthcare Needs, Settings, and Care Methods

COVID-19 put an extreme amount of pressure on healthcare workers. More than ever, people are looking for healthcare support, and the pandemic shined a light on many of the weaknesses in our system as providers have scrambled to meet patients’ escalating needs in unprecedented circumstances.

In general, patient expectations have been rising rapidly in recent years: consumers are looking for better care, delivered more conveniently, with faster, more frictionless technology. Major retailers and other customer experience leaders are shaping customer expectations – and consumers bring those expectations with them into their healthcare experiences. COVID has only made the importance of meeting these expectations clearer.

The focus on meeting patient expectations does not end at urgent care or pandemic management. In fact, the most common healthcare need in the past 18 months was primary care, with 75% of respondents stating a need for basic care that did not require a specialist. It is clear from our research that the pandemic was a catalyst for a major increase in patient expectations, but it was not the sole cause – factors like regulation, technology, and an influx of capital were already changing the face of healthcare long before the pandemic struck.
Generational Differences in Healthcare Needs

The need for specific types of healthcare varies by generation. For example, Baby Boomers have needed specialty (23%) and primary care (82%) more than other groups, while mental health care was more frequently used by Gen Z (26%) and Millennials (21%). Millennials were also more interested in lifestyle and wellness offerings than other groups, with 26% of millennial respondents reporting interest as opposed to an average of 11% from other generational demographics.

Although younger generations exhibit greater demand when it comes to mental healthcare utilization, mental health needs are rising across the board. According to the CDC, around 1 in 5 adults sought care for a mental illness of some kind in 2019, with women more likely to receive treatment than men.

COVID only exacerbated this need: a follow-up survey by the CDC found that rates of mental illness had nearly doubled since 2019, with 40% of respondents reporting symptoms of a mental health issue in June 2020.
With the surge in healthcare needs, simply getting in to see a provider was a top-of-mind challenge for many respondents.

I hate the change that the pandemic has ushered in. Many people will die from giving up going to the doctor because it’s so challenging to get in.

MALE RESPONDENT, 45-49

Telehealth on the Rise, but In-Office Still Reigns

For much of recent history, patients have overwhelmingly preferred to visit their providers in their offices – even right before the onset of COVID, healthcare providers were only doing 6-7% of appointments via the phone or video chat.

During the pandemic, the percentage of care appointments done by telehealth or phone rose to 30%, where it has stayed since the spring of 2020. While that is still a minority of care delivered, and in-office care is still prominent, it is nonetheless an enormous jump. It is clear that telehealth is continuing to grow in penetration as the use cases it can deliver care for continues to expand.

The technology for virtual care has only improved over the past 18 months, and as the tech improves, so does the patient’s experience with telehealth. Now that the pandemic
is tapering off, telehealth use may dip, but it will not decrease significantly. We predict that telehealth will continue to be a viable option for many patients, alongside the traditional in-office care model.

In addition to the convenience factor of telehealth, COVID prompted the federal government to approve reimbursement for virtual services, which resulted in more providers offering it and more private payers adopting it. When the pandemic ends, there may be broad rollbacks of telehealth reimbursement – we have already seen this happen in some cases – but what is certain is that providers who offer telehealth will connect with the many patients who prefer it.

Ultimately, the most common healthcare setting, even at the height of COVID lockdowns, was the provider’s office. However, 38% of patients listed telehealth among their top options. In-office visits and telehealth are complementary and will continue as viable options for patients as they weave in and out of channels.

The preference for virtual or in-person care is split across demographics: women seem to prefer to see a provider in their office, while men are more likely to prefer retail clinics and at-home care.

The type of care needed also carries weight in a patient’s decision between an in-office or telehealth appointment: our respondents ranked telehealth as the second-most preferred setting for primary care and behavioral/mental health care. When it comes to primary care, nearly 90% of patients across all generations – with the notable exception of Baby Boomers – prefer, or are open to, telehealth.
Telehealth continues to be a viable option for all generations with 31% of Gen Z, 41% of Millennials, 47% of Gen X, and 33% of Boomers saying they have participated in telehealth in the past 18 months. Half of Millennials place telehealth in their top three preferred methods of receiving care, and are the generation most open to at-home care.

Baby Boomers still prefer receiving care in doctors’ offices. But those who state they have used telehealth services in the past 18 months are open to continuing to do so.

Younger generations’ preferences are still for provider offices as well, but are more open to diverse settings for care. To target these demographics, healthcare providers should consider a variety of options including telehealth, urgent care, retail clinics, and at-home care.

I think meeting a person is vitally important for the PCP to be able to perform a full, accurate assessment. With just telehealth, maybe small signs like tremors, jaundice, fingernail health would be missed.

FEMALE RESPONDENT, 45-49
Care Types and Setting Preferences

Because patients prefer different settings for various kinds of care, providers and payers need to be open to multi-channel care, and must provide consistent, high-quality care through every channel. While in-office care is still the number one choice, our findings showed a range of secondary preferences for the following care types:

- **Primary Care**: Consumers strongly prefer going to a provider’s office for primary care, with telehealth and urgent care vying for second place.

- **Behavioral/Mental Health Care**: The consumer preference is to be in a provider’s office, and the majority are not even open to visiting a retail health clinic.

- **Specialty Disease Care**: While the provider’s office is the top choice, patients seeking specialty disease care are quite open to an urgent care setting.

- **Lifestyle & Wellness**: Consumers prefer a provider’s office, followed by at-home and telehealth options.

- **PT, OT, and Other Therapy**: Patients show significant openness to at-home and urgent care settings, but they prefer in-office care.
Avtex Tips for Healthcare Providers

Express empathy and keep the human element in your care. Regardless of the preferred care setting or the demographic of the patient, nearly all of them desire to keep the healthcare experience as human as possible.

Every generation has different preferences for healthcare needs, settings, and methods of care. Avoid alienating specific age groups by offering a variety of services. To best target younger demographics, prioritize convenient offerings. Double down on traditional channels for Baby Boomers. Work to better understand your patients’ preferences and needs, then deliver an experience that is personalized and thoughtful.

Mental health services are in high demand and increasing, so ensure you are highly staffed with well-qualified individuals and offer delivery channels to meet the needs and expectations of different demographics. Alternatively, if your organization does not offer mental health services, consider partnering with external resources that offer it for employees and patients.
Communication Preferences and Standards

Provider Communication Preferences

In recent years, the number of provider and payer communication channels available to patients and members has skyrocketed, especially when it comes to digital and self-service options.

Traditionally, consumers had to pay for claims by mail or call their provider’s office during business hours to schedule an appointment. Today’s expectations are omni-channel by nature. Consumers want to be able to pay claims through portals or other digital interactions and schedule appointments via chatbots or text messaging, send their provider a text or email, and ask questions about their care 24/7 through chat or interactive voice response.

There are more ways than ever for healthcare providers and payers to connect with patients and members, but that also means there are more opportunities to let consumers down if the quality of these additional channels lags. Understanding how to create simple, seamless interactions that are based on patient preferences, is key to making sure your investments succeed.

The Human Element of Healthcare Still Rules

When asked about their greatest difficulties with provider interactions, consumers were most concerned with getting through to a human and receiving good care.

“All the interactions are online and it really complicates the entire process. Whether it’s connection difficulties or the lack of in person interaction, it all makes me feel like I’m not receiving the same level of care I previously received. I also think it is easy to forget meetings/consultations (whether you’re a doctor or a patient) when they take place over the internet.”

RESPONDENT AGE 18-24

When communicating with their healthcare provider, consumers — especially Baby Boomers and Gen X — generally prefer talking on the phone or face-to-face.
Every patient has unique needs, behaviors, and preferences. To target younger demographics, extend your channels to include more digital options. But do not neglect your traditional channels, which appeal more to Baby Boomers. To meet your patients’ varying needs, the best approach is to invest in an omnichannel strategy.

For Millennials and Gen Z, these traditional modes of engagement win out over other methods, but newer channels appeal to them more than they do to Baby Boomers. Over 1/3 of Gen Z and Millennials list apps/portals, and chat options in their top channels.

![Healthcare Communication Preferences](chart.png)

* Survey respondents could select up to three options

Every patient has unique needs, behaviors, and preferences. To target younger demographics, extend your channels to include more digital options. But do not neglect your traditional channels, which appeal more to Baby Boomers. To meet your patients’ varying needs, the best approach is to invest in an omnichannel strategy.
All Channels Must Be Part of the Strategy

While phone and email are consumers’ preferred channels for conducting nearly all provider interactions outside direct care, there are exceptions: patients prefer to use an app/portal for paying bills and updating contact information, and they prefer text for appointment reminders. When it comes to straightforward transactions, convenience is key.

It is important to remember that not all channels are the same. Every channel serves a unique purpose in the patient journey. Thus, every channel must be considered when building your patient experience strategy.

### Healthcare Communication Preferences

<table>
<thead>
<tr>
<th>Action</th>
<th>Phone</th>
<th>Email</th>
<th>Text</th>
<th>App/Portal</th>
<th>Chat</th>
<th>Online Form</th>
<th>Automated Phone</th>
<th>In Person</th>
<th>Postal Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communicating to providers</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule an appointment</td>
<td>66%</td>
<td>31%</td>
<td>28%</td>
<td>38%</td>
<td>19%</td>
<td>20%</td>
<td>12%</td>
<td>24%</td>
<td>--</td>
</tr>
<tr>
<td>Change an appointment</td>
<td>66%</td>
<td>33%</td>
<td>31%</td>
<td>37%</td>
<td>15%</td>
<td>15%</td>
<td>20%</td>
<td>16%</td>
<td>--</td>
</tr>
<tr>
<td>Request info on cost</td>
<td>65%</td>
<td>49%</td>
<td>27%</td>
<td>32%</td>
<td>20%</td>
<td>17%</td>
<td>9%</td>
<td>26%</td>
<td>--</td>
</tr>
<tr>
<td>Update contact info or pref</td>
<td>45%</td>
<td>39%</td>
<td>20%</td>
<td>45%</td>
<td>14%</td>
<td>31%</td>
<td>15%</td>
<td>26%</td>
<td>--</td>
</tr>
<tr>
<td>Pay a bill</td>
<td>28%</td>
<td>22%</td>
<td>14%</td>
<td>50%</td>
<td>8%</td>
<td>24%</td>
<td>19%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>Get help with medications</td>
<td>58%</td>
<td>36%</td>
<td>30%</td>
<td>39%</td>
<td>17%</td>
<td>16%</td>
<td>19%</td>
<td>26%</td>
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<tr>
<td><strong>Receiving information from providers</strong></td>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td>Receive appointment reminder</td>
<td>49%</td>
<td>58%</td>
<td>65%</td>
<td>22%</td>
<td>--</td>
<td>--</td>
<td>38%</td>
<td>--</td>
<td>9%</td>
</tr>
<tr>
<td>Receive test results</td>
<td>62%</td>
<td>60%</td>
<td>35%</td>
<td>46%</td>
<td>--</td>
<td>--</td>
<td>14%</td>
<td>--</td>
<td>18%</td>
</tr>
<tr>
<td>Receive appt prep instructions</td>
<td>58%</td>
<td>63%</td>
<td>47%</td>
<td>33%</td>
<td>--</td>
<td>--</td>
<td>26%</td>
<td>--</td>
<td>16%</td>
</tr>
<tr>
<td>Receive post-care instructions</td>
<td>63%</td>
<td>63%</td>
<td>37%</td>
<td>43%</td>
<td>--</td>
<td>--</td>
<td>15%</td>
<td>--</td>
<td>18%</td>
</tr>
<tr>
<td>Receive instructions for at-home test</td>
<td>61%</td>
<td>66%</td>
<td>38%</td>
<td>33%</td>
<td>--</td>
<td>--</td>
<td>15%</td>
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<td>21%</td>
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</tbody>
</table>

While phone and email are consumers’ preferred channels for conducting nearly all provider interactions outside direct care, there are exceptions: patients prefer to use an app/portal for paying bills and updating contact information, and they prefer text for appointment reminders. When it comes to straightforward transactions, convenience is key.

It is important to remember that not all channels are the same. Every channel serves a unique purpose in the patient journey. Thus, every channel must be considered when building your patient experience strategy.
Emerging Channels – Chatbots and AI

As chatbots and other AI tools improve and proliferate across industries, it is useful to know how they can add the most value in the healthcare space. Our study found that overall, a provider search chatbot would capture the most interest across all consumers, with a symptom checker coming in second.

On a generational level, the patients most receptive to chatbots are Gen Z, but this too depends on the way the bot is employed. For Millennials, provider search functionality is most important in a chatbot application, while Gen Z is most interested in using a bot to better understand their benefits.

Barriers to Communication

Across demographics, the greatest barriers to patient-provider communication are: too much effort, a lack of communication options, and unfriendly user systems.

When asked what stopped them from communicating with their providers, 56% of those surveyed selected “a lot of effort,” “not easy to use,” or both. Whether it’s a long wait on the phone, a glitchy appointment-setting app, or telecommunications issues, patients are experiencing prohibitive levels of difficulty connecting with their healthcare providers.
To encourage patient engagement, it is crucial that providers prioritize ease of use for their patients, which means offering multiple communication channels and ensuring those channels operate seamlessly.

**Barriers of Communication**

- It requires a lot of effort to connect with them: 42%
- They do not offer all the communication options that I would like: 33%
- Their systems are not easy to use: 26%
- Their systems are not reliable: 16%
- I do not trust the security of my health info: 14%
- I get locked out: 11%
- I do not have the technology: 6%
- Other: 4%
- Nothing gets in the way (write-in): 12%
Payer Communication Preferences – Humans Please!

Our research found that in general, it is more difficult for consumers to interact with payers than providers. Consumers’ top-of-mind comments on interacting with insurance plans focus on the difficulty of getting through to someone, and the struggle to get clear answers to their questions. Common complaints included frustration with automated systems, long call wait times, and difficulty understanding their benefits and coverage.

Health insurance is notorious for being hard to understand. Explanations of benefits are complex, full of legal language and special codes, which makes them confusing for patients without industry knowledge. And when patients research their coverage ahead of a procedure to see how much they will be expected to pay, they often come away more confused than before, since coverage questions rarely have yes-or-no answers.

Our research bears this out: we found that consumers strongly prefer to call and talk to a human being at their insurance plan, with the expectation that a person might be able to articulate complicated coverage details more clearly than text. This preference for human communication is stronger with payers than with providers (71% vs. 62%), and again Baby Boomers lead the charge, with 84% preferring a phone call to other channels.

As a consumer accustomed to making one-click Amazon purchases from my smartphone, healthcare falls short in meeting my needs because they lag behind in customer technology.

RESPONDENT AGE 18-24
The human element is not going away – especially when it comes to understanding benefits and coverage – but in many cases it is becoming less critical for younger generations, who are more open to communicating with payers via mobile apps, patient portals, online web forms, and texting.

Different Tasks, Different Channels

Different channels have different benefits and drawbacks, so they lend themselves to different tasks.

<table>
<thead>
<tr>
<th>Phone</th>
<th>Email</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage medications, determine coverage and deductible, check claim status, shop for healthcare</td>
<td>Submit a claim, request insurance card or policy info</td>
<td>Manage medications, learn about co-pay</td>
</tr>
</tbody>
</table>

*A small percentage of our respondents did not have health insurance so questions about their health plan were not applicable.*
It’s All About Ease of Use

The strongest barriers to communicating with insurance carriers are perceived effort and difficult-to-use systems. “A lot of effort” is seen as a greater barrier to communicating with insurance carriers than dealing with healthcare providers.

On a generational level, Gen X are the most likely to find systems difficult to use, while Gen Z and Millennials are more put off by reliability issues than other groups.

What About Chatbots?

While chatbots are not the top preferred channel for any use case or demographic, they are of increasing interest to younger generations, especially when it comes to helping the consumer find a provider and understand their benefits. The youngest generation surveyed, Gen Z, is most open to this idea.
The data shows a wide variety of preferences across demographic segments, so providers and health plans must gather patients’ and members’ channel preferences, then deliver seamless experiences through all of them. At the end of the day, you cannot serve your patients and members if you are not playing in the channels they prefer. You must provide the capability to start a conversation on one channel and finish on another.

Providers and payers that require patients to spend “a lot of effort” to engage them are not yet meeting patients where they are with regards to channels and simplicity of interaction – improving ease of use should be a major focus. Documenting the entire patient journey will identify pain points for patients that can be addressed. Not all channels work for every interaction.

While younger demographics have shown a clear interest in SMS, email, AI, and other technologies, one thing remains certain: talking directly to a human is still preferred in many communication situations. Make an effort to hear and understand your patients and members, whatever communication channel they use.
Seamless, Omnichannel Experiences Are the Standard in Healthcare

Overall, healthcare consumers want easier experiences with their providers and health plans. 71% of patients said they want their healthcare providers to be as convenient and straightforward as their experiences in other areas of life.

Since COVID hit, 59% of respondents say they have been interacting differently with their healthcare providers than they did pre-pandemic, and 68% said their healthcare providers need to improve their patient interactions. These improvements can include more convenient appointment scheduling options, increased contact center functionality, and better person-to-person connections.

The only way to future-proof your healthcare practice is to meet patients where they are with regards to channels and simplicity of interaction.

It is clear from our findings that providers are not always meeting the mark for communication channels and ease of use. To prevent patient attrition, providers need to strategize and build more robust solutions to engage people where they are most comfortable, which means assessing your current state CX and building a roadmap for future state CX.
Patient preferences are changing rapidly, and the old way of doing things will lead to decreased retention as patients seek more fulfilling and simple healthcare interactions. Lower retention means less money, and for an industry that lost billions last year, retention and revenue are both of paramount importance. Healthcare experiences are known to be more difficult than comparative retail experiences – they are less present in the channels patients prefer, and the technology and accompanying experiences fall short of what consumers expect of a modern digital interaction.

Smart health, home care, telehealth, and remote connected devices are all on the rise. Brick and mortar hospitals will maintain their place at the center of the care ecosystem, but over time, these other solutions and technologies will create more value at the periphery and reduce the volume of interaction at brick and mortar institutions.

**If providers and payers want to retain existing patients and members as well as attract new ones, they cannot ignore the rapid increase of experience-delivery channels or the simultaneous expansion of various preferences that drive engagement in those channels.**

Patients’ preferences are quickly evolving. As a payer or provider, you have the power to meet your patients’ needs more effectively, but you do not have to do it alone. Avtex is here to help you transform the patient and member experience.

Avtex has a proven, repeatable methodology for helping healthcare organizations assess their CX maturity. We can measure your CX maturity through more than 40 criteria across five disciplines: CX alignment, CX understanding, CX design, CX orchestration, and CX measurement. Your CX score will place you in one of four categories: Absent, Ad Hoc, Reliable, or Imbedded. One of our experts would be happy to consult you to help you determine your current CX state and build a roadmap for your future state CX.

Avtex can help you with both the strategic design and technological orchestration to build out omnichannel solutions, which are essential for meeting your consumers' needs and keeping at the forefront of your industry as the world evolves.
Methodology

The Omnichannel Healthcare Report from Avtex explores the preferences for omnichannel interactions, payer and provider communications, and receiving healthcare for 1,025 healthcare patients representing the general U.S. population. Respondents are demographically similar to the U.S. population based on age, gender, income, ethnicity, and region. The data was collected February 5-26, 2021 via a 15-minute, web-based survey fielded via Qualtrics panels. Readers can assume a 3-5% margin of error depending on the respondent base in question.

Respondents from the Omnichannel Healthcare Report are rounded out with the following demographics, generally reflecting the US population:

**Ethnicity**
- White: 79%
- Black or African American: 13%
- American Indian or Alaska Native: 3%
- Asian: 6%
- Native Hawaiian or Pacific Islander: 0%
- Other race/ethnicity: 2%

**Spanish/Hispanic/Latino**
- Yes: 10%
- No: 90%

**Age**
- Under 18: 0%
- 18-24: 10%
- 25-34: 16%
- 35-44: 17%
- 45-54: 18%
- 55-64: 16%
- 65+: 23%
- Baby Boomers + (56-74 years old): 39%
- Generation X (40-55 years old): 25%
- Millennials (24-39 years old): 26%
- Generation Z (8-23 years old): 10%
Interacted with **Provider** in Past 18 Months

- Yes: 87%
- No: 13%

Interacted with **Insurance Plan** in Past 18 Months

- Yes: 68%
- No: 32%

Health Plan

- Employer health plan: 44%
- Medicare: 30%
- Medicaid: 13%
- Individual/ACA plan: 10%
- Va or Tricare: 3%
- I do not have health insurance: 6%
- Health insurance-other: 3%

Tested positive for COVID-19 in the past 9 months:

- 8%
About Avtex

Avtex, A TTEC Digital company, is a full-service Customer Experience (CX) consulting and solution provider focused on helping organizations create better experiences for their customers. With an unparalleled breadth of knowledge and experience, and partnerships with leading technology vendors like Microsoft and Genesys, we are uniquely suited to address any CX challenge.

Our portfolio of solutions and services supports our unique approach to Customer Experience, which includes two key phases to achieving CX Transformation.

- **Our CX Design** solutions and services aid in the process of defining and improving CX. From journey mapping to CX design thinking, we provide the support you need to set the foundation for CX success.

- **Our CX Orchestration** solutions and services enable the realization of your CX strategy through people, processes and technology. From technology implementation to training, we ensure you have the capabilities to execute your CX strategy.