

The Patient-Provider Relationship Study:

The Ripple Effect
Starts with Boomers

What do patients really want? Solutionreach 2017 survey reveals how generational factors impact patient-provider relationships.

Methodology

Solutionreach commissioned a consumer research study to better understand:

- Physician/practice selection
- Key elements of patient satisfaction
- What prompts patients to switch physicians or practices
- The communication/ touchpoint offerings consumers desire from their providers

The research was conducted across four distinct practice specialties:

- Primary Care
- Ophthalmology
- Dentistry
- Dermatology

Nearly 2,100 consumers were interviewed, with respondents representing three generations:

- Millennials (ages 21-34)
- Generation X (ages 35-51)
- Baby boomers (ages 52-70)

Respondents had health insurance, made health decisions for themselves or their families, and had visited a doctor in one of the four specialties in the past year. Results were compared within and across specialties as well as generations.



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EXECUTIVE SUMMARY:

Rethinking the patient-provider relationship

As patients take on more responsibility for their medical bills, they are more often approaching healthcare decisions with a retail-oriented mindset. It's no longer enough to provide high-quality care or for providers to rely on clinical excellence. Today, patients want convenience, access to their providers outside of the office, and outstanding service in every aspect of their care.

The Patient-Provider Relationship Study examines this dynamic across generational preferences, when liking and trusting your doctor is no longer enough. Armed with data that can easily be accessed with a mobile device, patients consider many factors when deciding where to spend their healthcare dollars—and communication before, during, and after care plays a big role in the decision-making process. While communication preferences vary by generation, it's clear that a variety of communication touchpoints are needed to meet patients' needs and expectations—and that the generational preferences are closer together than you might guess.

Key Findings

Liking your doctor is no longer enough.

Providers can no longer rely on clinical care excellence to keep patients coming back. Across specialties, factors such as dissatisfaction with practice logistics—including wait times, office/staff interactions, convenience, communication, and the ability to make an appointment with ease—are prompting patients across generations to switch physicians.



Millennials

43 percent are likely to switch practices in the next few years

54 percent have already made a switch in the past two to three years

Generation X

44 percent are likely to switch primary care physicians in the next three years

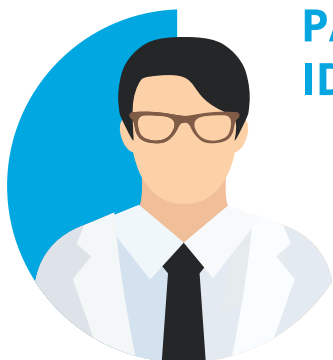
Baby boomers

20 percent are likely to switch physicians in the next three years

Boomers want tech conveniences, too.

Fifty-eight percent of baby boomers, who consume the largest portion of healthcare services in the country, are spending **three times more for personal healthcare** than the average working-age person, according to the Centers for Medicare & Medicaid Services.

Across generations, including for boomers, text and online touchpoints have the greatest opportunity to improve patient satisfaction and retention, the study found. At the top of all patients' "ideal doctor" wish lists: greater connectivity, convenience via text and online tools, and, as always, more time with their physician.



PATIENTS' IDEAL DOCTOR

Wish List



Greater Connectivity



Online tools



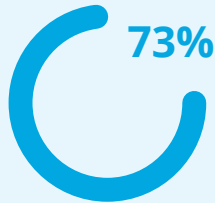
Convenience via text



More time with doctor

The doctor will text you now.

Patients desire a wide range of communications with providers, including those delivered online and via text. The standard phone call, while still useful, simply isn't enough—this is especially true among younger generations.



Most patients desire the ability to text their doctor's office.



79 percent would like to receive text messages from their doctor, especially about appointments.

Extremely or Very Appealing Touchpoints Averaged Across the Four Specialties

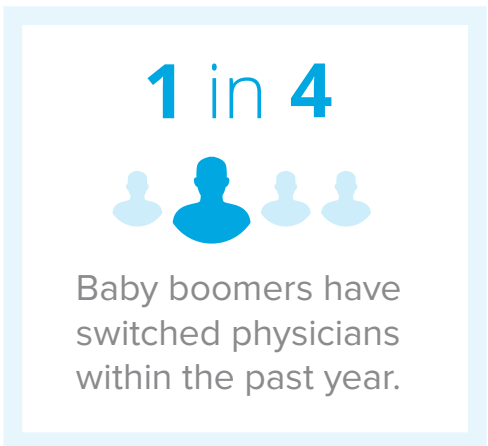
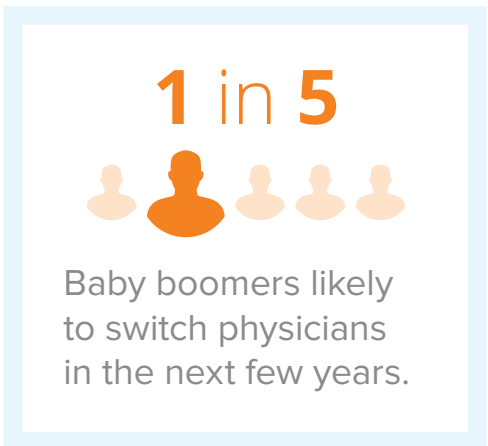
| Appointment Reminders | Millennial | Gen X | Boomers |
|-----------------------|------------|-------|---------|
| Phone | 74% | 76% | 76% |
| Online/Email | 70% | 66% | 50% |
| Text | 73% | 70% | 45% |

| Appointment Alerts | Millennial | Gen X | Boomers |
|--------------------|------------|-------|---------|
| Phone | 71% | 73% | 67% |
| Email | 71% | 62% | 44% |
| Text | 75% | 68% | 46% |

| Reminders For Follow-Up Appointment/Treatments | Millennial | Gen X | Boomers |
|--|------------|-------|---------|
| Phone | 72% | 73% | 72% |
| Email | 71% | 64% | 51% |
| Text | 73% | 67% | 43% |

Baby Boomers

Baby boomers, the largest consumers of healthcare services, [spend two to three times more on care](#) than millennials. Boomers represent a significant financial risk for providers when you consider that *The Patient-Provider Relationship Study* revealed **one in five baby boomers is likely to switch physicians** in the next few years.



Worth the Risk?

Even though 20 percent of boomers have indicated a likelihood to switch physicians in the next few years, their communication needs are sometimes forgotten in the race to please younger generations.

Consider these viewpoints:

When boomers are split into two age cohorts—younger (52-57) and older (58-70)—younger groups are "[health tech data junkies](#)." They feel empowered by the personal health data that wearables and other new technologies provide.

Boomers want a personal connection with their healthcare providers, with whom they ideally will maintain relationships over the long term. When patients feel like a number to their physician practice and not a person, the risk of losing patients to a competitor increases. This can impact patient outcomes, as well as present a financial risk to providers.

Failure to manage relationships with baby boomers is reflected in these key stats:

- Across specialties, baby boomer patients have satisfaction issues with both their doctor and the office/staff, especially for primary care and ophthalmology. This points to the importance of maintaining a better overall relationship with baby boomer patients.
- Twenty-four percent of baby boomers responding to the survey have switched physician practices within the past year.
- With the exception of dentistry, less than 50 percent of baby boomers are completely satisfied with the practice.



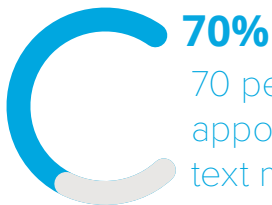
Generation X

Generation X find themselves at the center of healthcare decision-making for themselves, their children, and their parents. They are [characterized](#) as “hungry for information, skeptical of experts, but loyal to a plan of action once

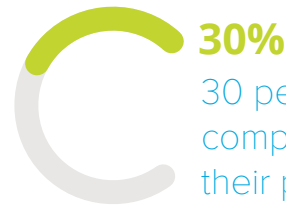
with dentists ranked higher, with 40 percent reporting they are “completely satisfied.”

- Forty-four percent of Gen Xers are “extremely, very, or somewhat likely” to switch primary care physicians in

text and online communications with physicians. Seventy percent also would favor appointment reminders by text, and 67 percent would appreciate texts to remind them of the need for follow-up care or treatment.



70 percent of Gen X favor appointment reminders via text message.



30 percent report being completely satisfied with their primary care physician.

they make a decision”—and the same could be said of their approach to healthcare.

Gen Xers may be the smallest generation in size when compared to boomers and millennials, but they currently have [more spending power than any other generation](#).

Given their influence over healthcare purchasing for multiple generations, dissatisfaction with their provider relationships should give practices pause:

- Only about 30 percent of Gen Xers report they are “completely satisfied” with their primary care physician, ophthalmologist, and dermatologist. Satisfaction

the next two to three years. Dermatologists rank second-lowest in loyalty among Gen Xers at 35 percent.

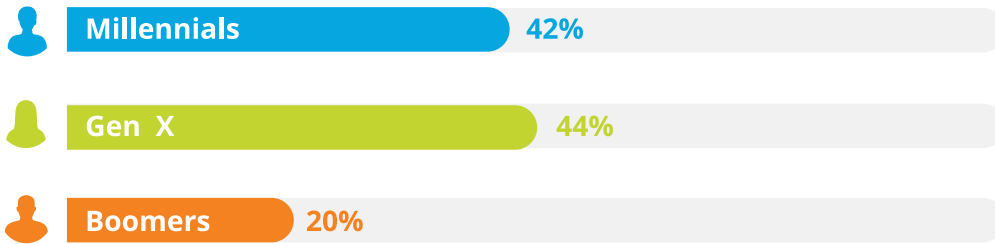
Gen X patients are less likely than boomers to be completely satisfied with the level of integration between their provider and office staff, with the exception of dentistry, where only 56 percent of Gen Xers and 57 percent of boomers report complete satisfaction.

Gen Xers also gave low marks for practice logistics among dermatologists, primary care physicians, and eye doctors, similar to millennials. Gen X patients crave

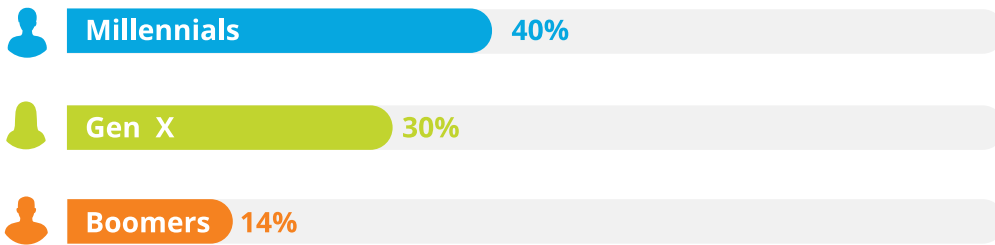
Given the number of family members for whom Gen X patients likely manage healthcare appointments and decisions, providing options for communication that best meet their needs is critical to attracting and keeping these patients.

Likelihood of switching physicians within the next two years

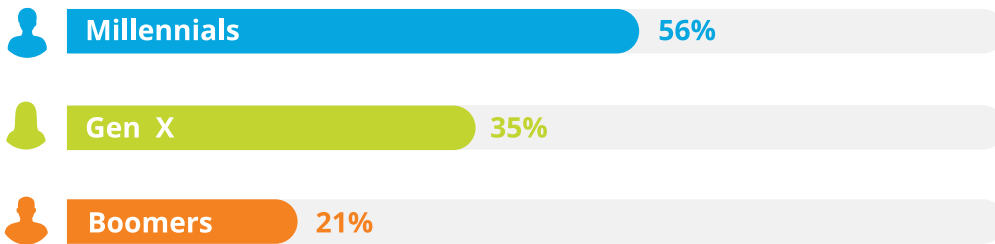
PRIMARY CARE PROVIDER



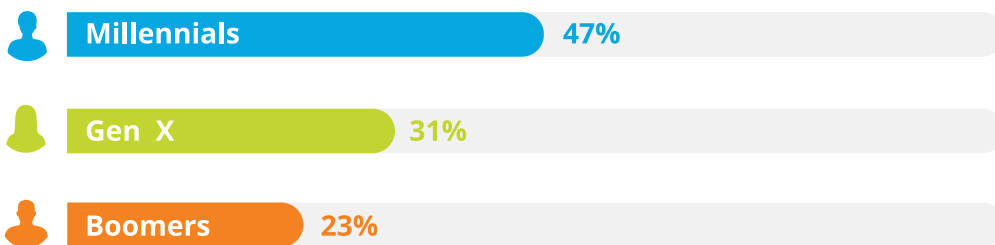
EYE DOCTOR



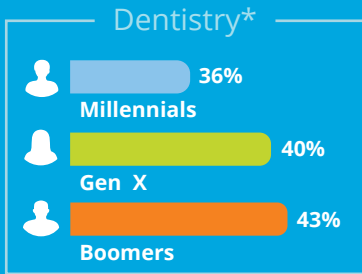
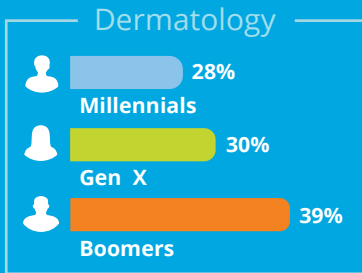
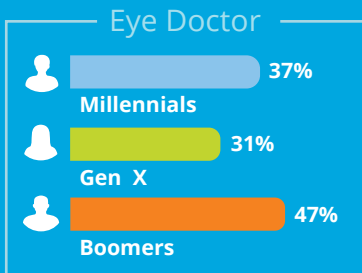
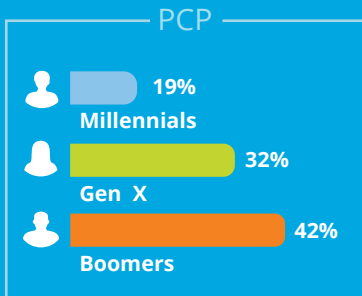
DERMATOLOGY



DENTISTRY



Completely Satisfied with Physician Practice



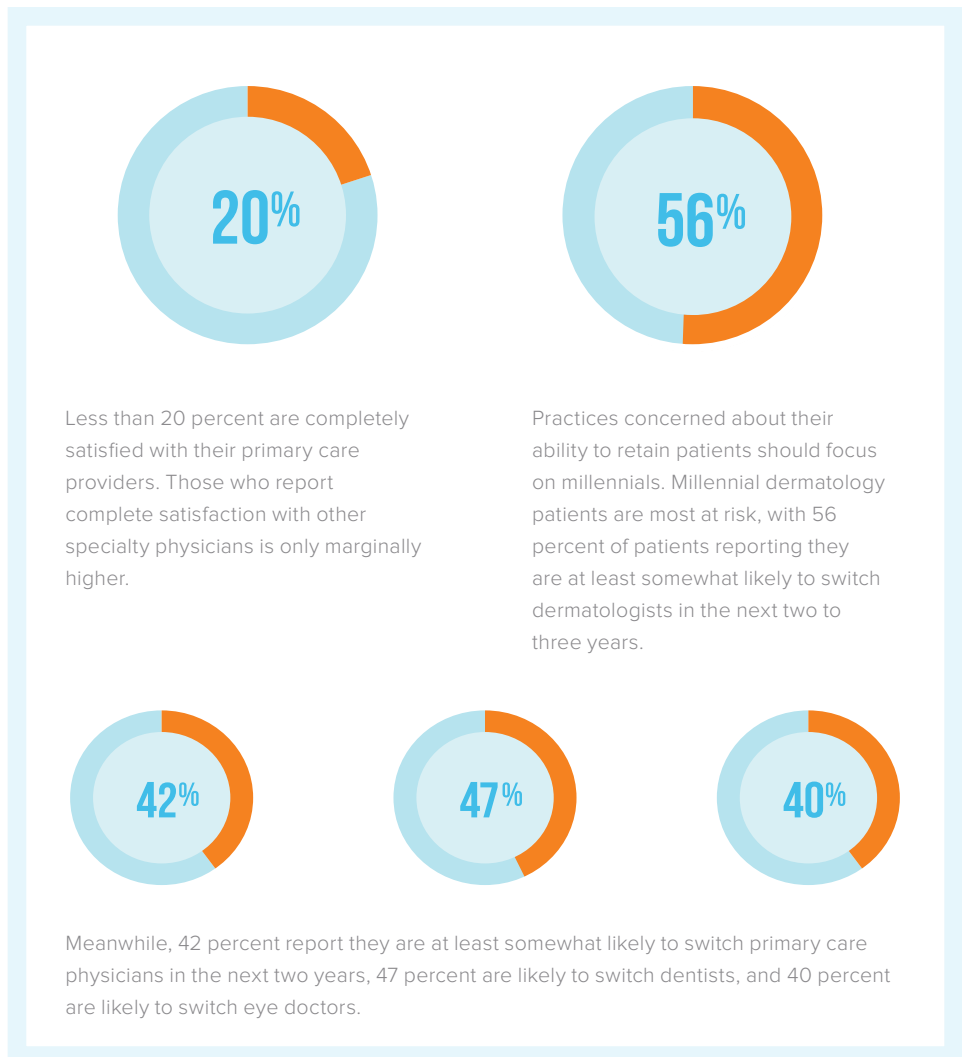
Millennials are consistently the least satisfied with their physician, physician practice, and practice logistics. They are also the most likely to favor online/email and text communications from their physicians and physician offices.

GENERATIONAL INSIGHTS:

Millennials

As millennials age and have more spending power, their preferences for convenience will disrupt the traditional healthcare system. Today's "nice-to-haves" will be tomorrow's essentials. In contrast to their older counterparts, millennials won't just expect these conveniences—they'll demand them. Without addressing how millennials communicate, providers will risk losing them to other practices.

Compared with boomers, millennials are much less satisfied with their experience with their doctors. Forty-three percent are at least somewhat likely to switch physicians in the next few years, according to the study. Most cite lack of convenience as their motivation to make a switch.





Adopting a Consumer Mentality to Communication

Patient relationship management—a coordinated approach to developing more meaningful interactions and long-term relationships with patients—is no longer an option for physicians and physician practices. Instead, it's a business strategy for retaining patients, attracting new ones, and maintaining high levels of satisfaction.

Patients are acting more like traditional consumers and choosing where to invest their healthcare dollars based on quality, cost, and convenience. Communicating with patients in ways that best fit their needs, preferences, and lifestyles is critical to developing strong patient-provider relationships.

Now, patients are looking to have more of a partnership with their provider. This shift in dynamic requires providers to adjust their approach to patient communication and engagement. Communication by telephone calls is no longer enough. To nurture patient relationships and foster loyalty, considering which technologies patients prefer to use in managing their communication with providers is essential.

Given the strong interest in text communications by younger generations and its appeal for boomers as well, investing in a platform that supports provider-patient text messaging is an important first step. So is an analysis of opportunities for communicating online and by email—not just around appointment reminders, but also in sharing personalized tips for improving health and establishing a two-way dialogue.

To find out more about how you can foster stronger patient relationships within your practice, visit www.solutionreach.com.



Solutionreach is revolutionizing the patient-provider relationship. Why? Because we get it. We know providers want meaningful patient relationships that not only impact loyalty, but also outcomes. We also understand that demands on physicians and administrative staff rarely allow for the patient interaction that both sides want.

That's why we created the industry's leading patient relationship management platform. It all started with email and text dental appointment reminders. Now, after more than 15 years and partnerships with more than 23,000 healthcare organizations in numerous specialties, we empower providers with the tools they need to maximize patient relationships and foster loyalty.

Together, we can help you nurture loyal and engaged patients. Experience what happens when you can spend your time where it matters most.

Find out more at www.solutionreach.com or call 1-800-955-8444.