

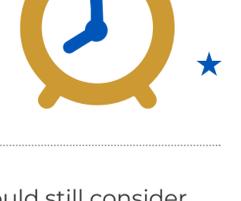
The State of Patient Access and Engagement

Consumer Demand Versus Reality

We set out to gain further insights into healthcare consumer trends related to accessing and engaging in care. The survey reveals a gap between consumer demand for better access to care and what they've experienced. It shows their heightened preference for using digital tools and channels to engage in care throughout the patient journey. It also highlights how they use health plan apps and websites more than other popular digital channels to find a provider and schedule care.

Patients Want Convenient Access to Care on Their Terms

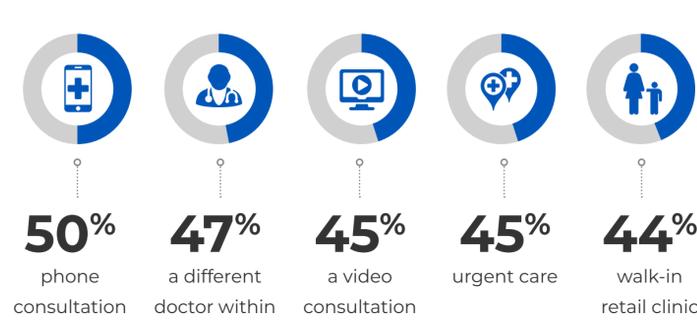
84% indicated that scheduling an appointment outside of business hours is "somewhat to very important" to them.



90% would still consider an alternative option if their primary care doctor was available when they wanted care.



Top alternative choices included in this multiple-answer question:

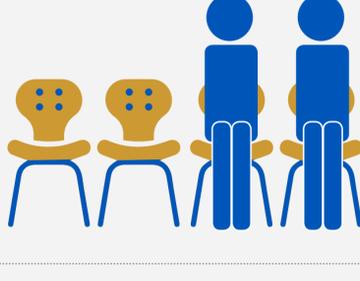


54% said within 7 days was the longest time they would prefer to wait between scheduling a routine doctor's appointment and visiting the doctor.



Reality Check: Patients Are Missing Care

53% said "yes" when asked if they missed a healthcare provider/hospital appointment in the last year



54% said "yes" when asked, if you ever delayed or put off visiting a doctor because it was too difficult to schedule the appointment.

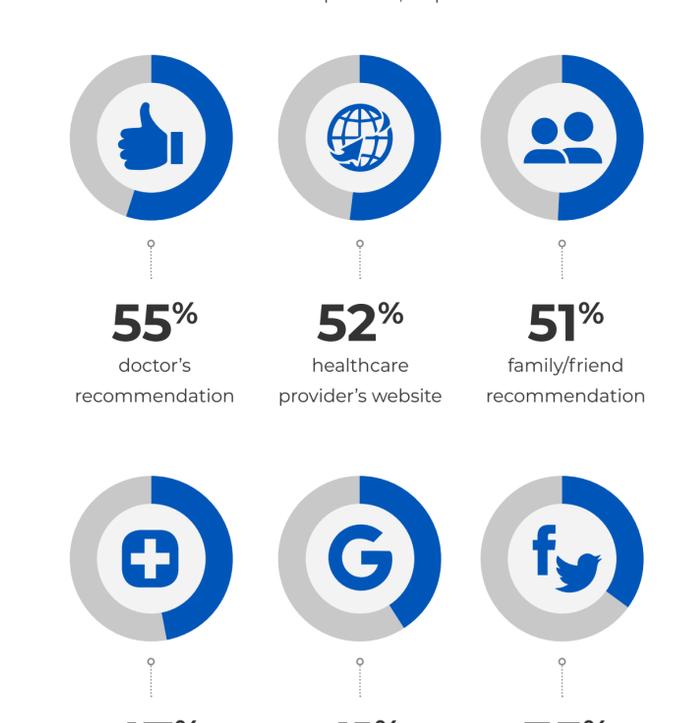


What are the most challenging parts of scheduling care with a provider:



Health Plan Digital Channels are More Popular than Google for Finding a Provider

When asked through a multiple-answer question, how do you tend to search for a healthcare provider, respondents selected:

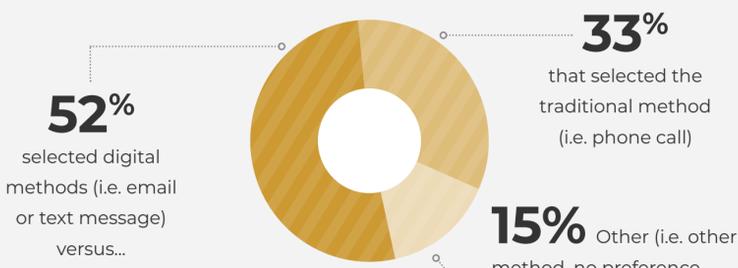


Have you ever used a health insurance plan's app or website to do any of the following?

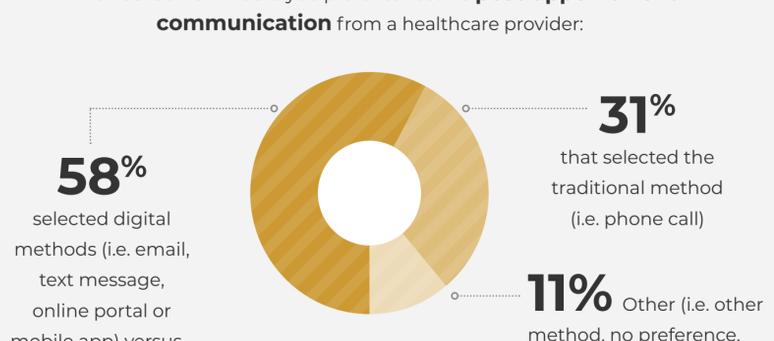


Digital Communications Becoming the New Norm for Patient Engagement

When asked what is your preferred method for receiving an appointment reminder for a scheduled healthcare visit:



When asked how would you prefer to receive post-appointment communication from a healthcare provider:



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