

Healthcare Appointment Booking: Audience Preferences for Online vs. Over the Phone

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BACKGROUND

In previous research, the Zion & Zion research team undertook a deep dive into healthcare and consumer technology, looking at the prevalence and use of health-related voice-search. Now we turn our attention to how consumers book their in-person appointments (via phone or online) and how they would prefer to book their in-person appointments.

EXECUTIVE SUMMARY

Zion & Zion conducted a nationwide survey of 1,049 consumers 18+. We investigated to what extent consumers are making online health appointments and whether they want more opportunities to do so. We found that over a third of consumers are already making healthcare appointments online, and nearly half of consumers would like to book medical appointments by computer or smartphone.

APPOINTMENT SETTERS

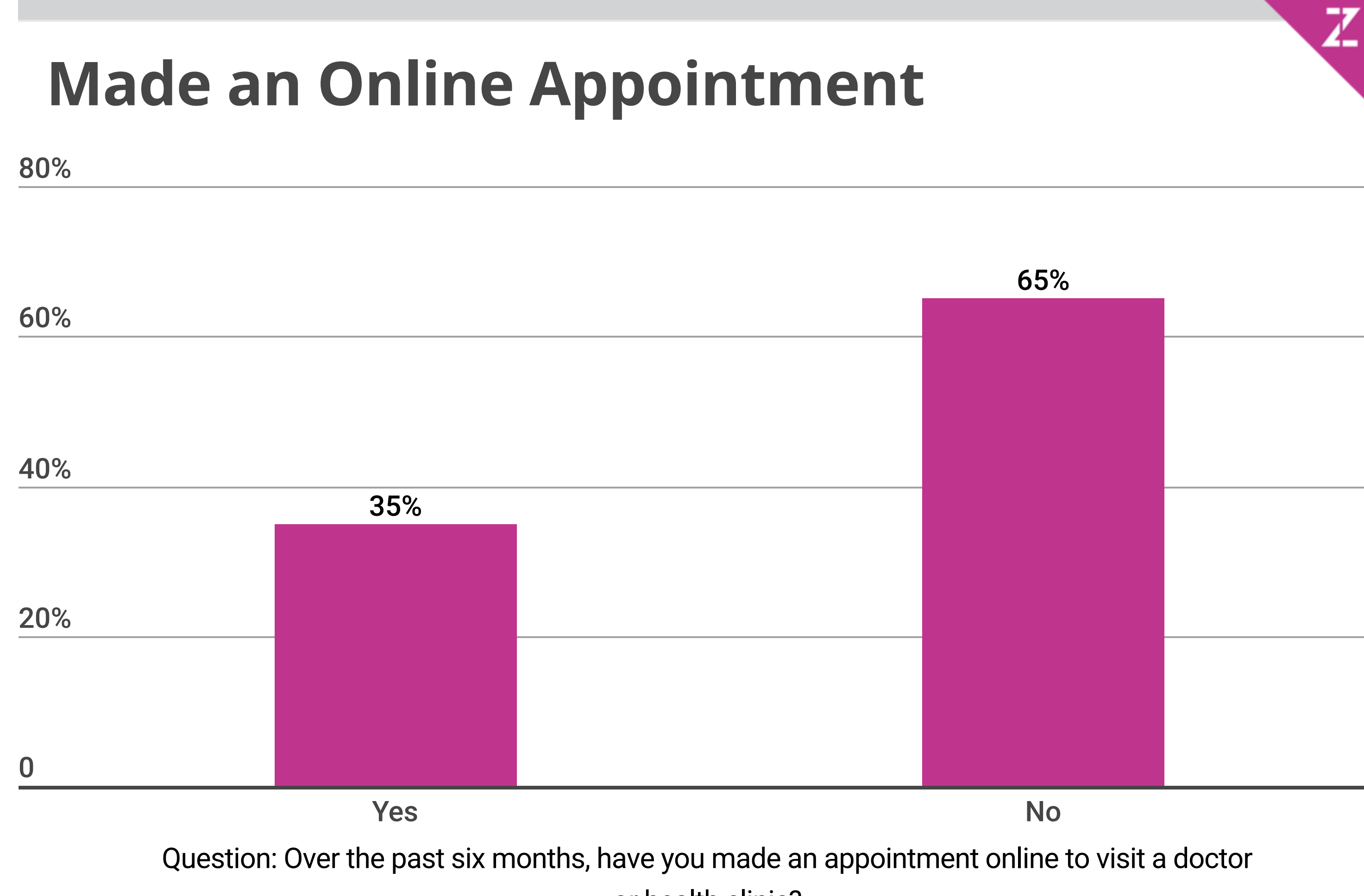
Unless you have an urgent health problem, an appointment is almost always required to be seen by a doctor, get your blood drawn or have an MRI or other imaging procedure performed.

Making an appointment can be frustrating, and it's never a sure thing. Even if you are very sick, your doctor might not have an immediate opening. Obtaining the appointment can be a challenge and might necessitate speaking with multiple people and suffering interminable holds on the phone. If you're new to a doctor, you'll be lucky to be accommodated in less than three weeks; new patients wait an average of 24 days to be seen.

And speaking of impatience, that's a key attribute of the millennial generation affecting nearly every business. Millennials often don't even want to pick up the phone. More than six million people use Zocdoc—an online physician locator and digital appointment scheduler—every month.

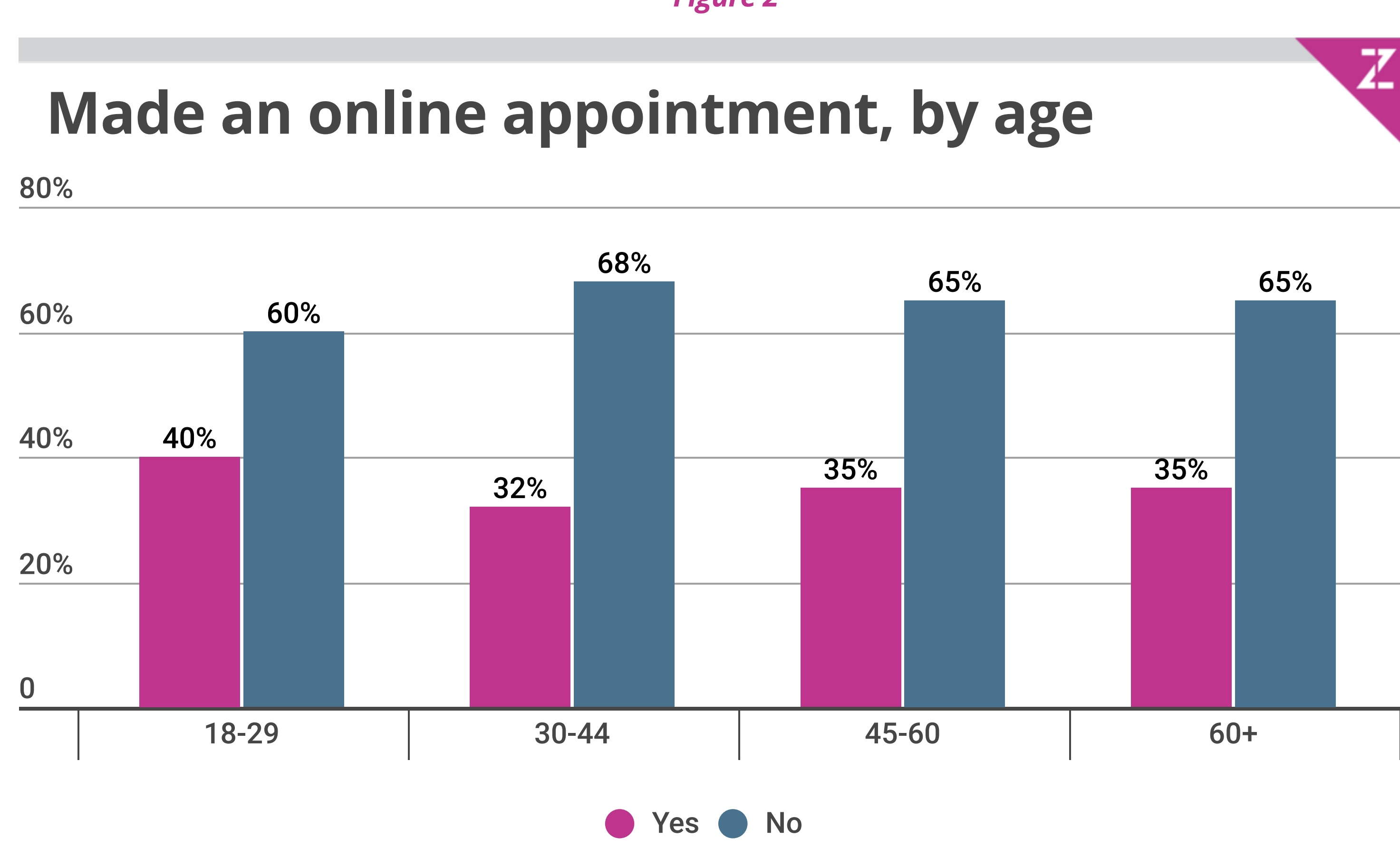
Our survey provides ample evidence that the digital appointment revolution is in full swing—35% of respondents say they have made an appointment online to visit a doctor or health facility within the past six months (see Figure 1).

Figure 1



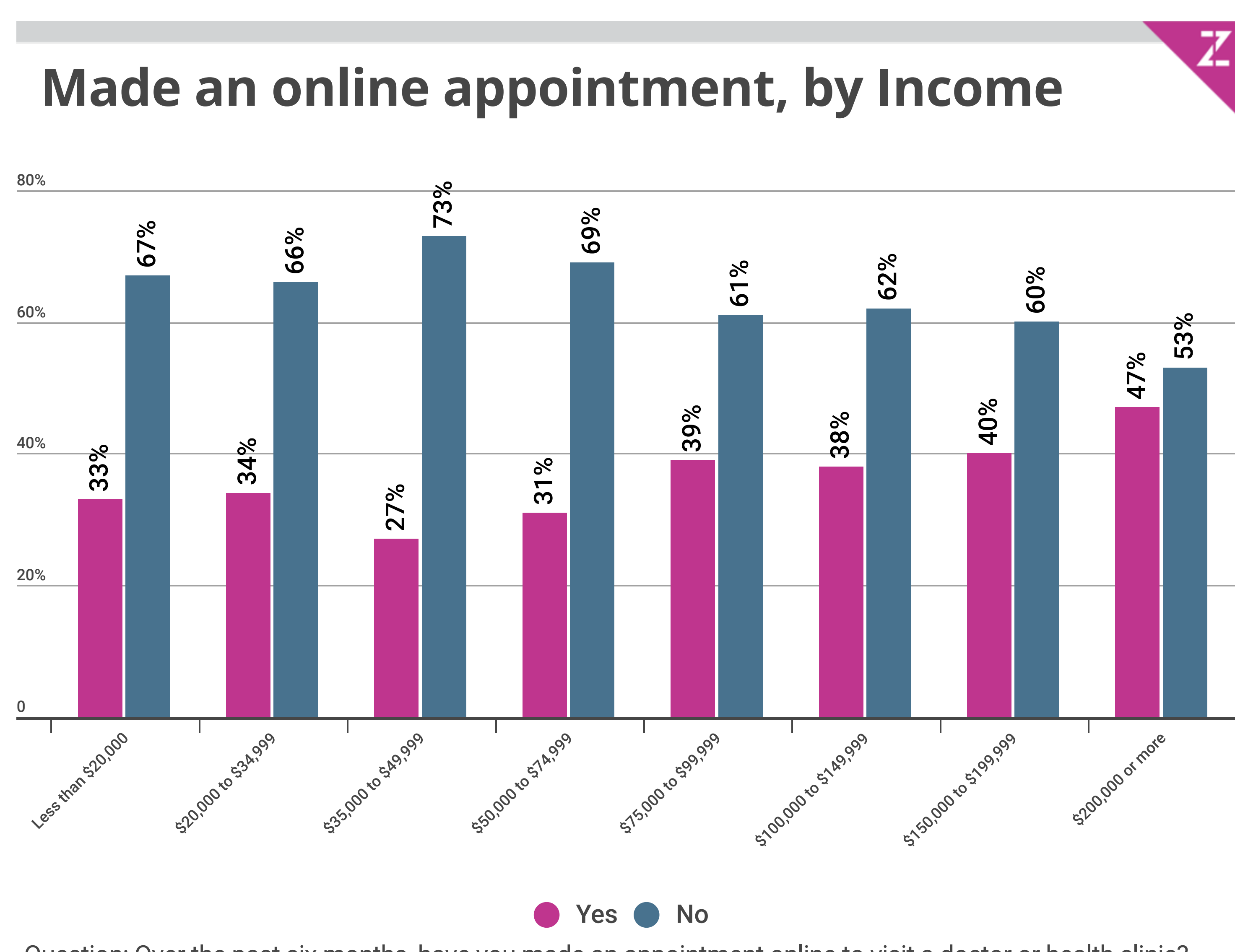
The youngest consumers (18-29) have the highest level of making digital appointments (40%), but that's only marginally higher than other ages, which average 34% (see Figure 2).

Figure 2



While age may not be a significant predictor of making online healthcare appointments, income does show a meaningful correlation (see Figure 3).

Figure 3

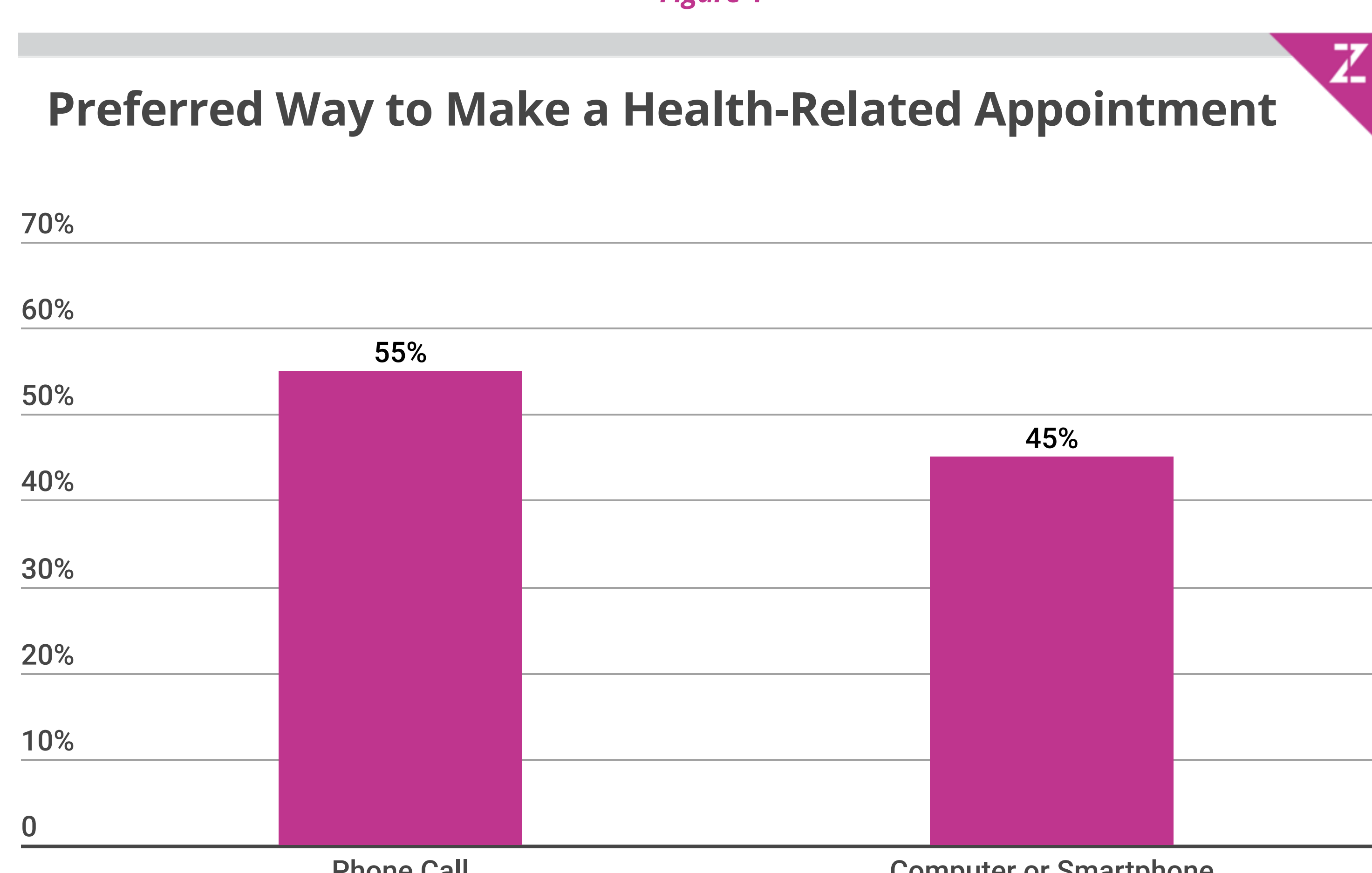


Higher income is associated with higher prevalence of making online appointments. People earning more than \$200,000 annually clock in with the highest level—47% of them have done so at least once during the past six months.

ACTION VS. DESIRE

When it comes to booking digital health appointments, there is a noteworthy difference between action and desire, which becomes evident when we compare current booking behavior to preferred booking method.

Figure 4



In Figure 1, we saw that 35% of consumers have made an online appointment to visit a physician or health facility. But here, in Figure 4, we can see that a full 10% more people want to use their computers and smartphones to do so. A further 5% swing would put digital on par with using the phone.

Figures 5 and 6 show this data by age and income.

Figure 5

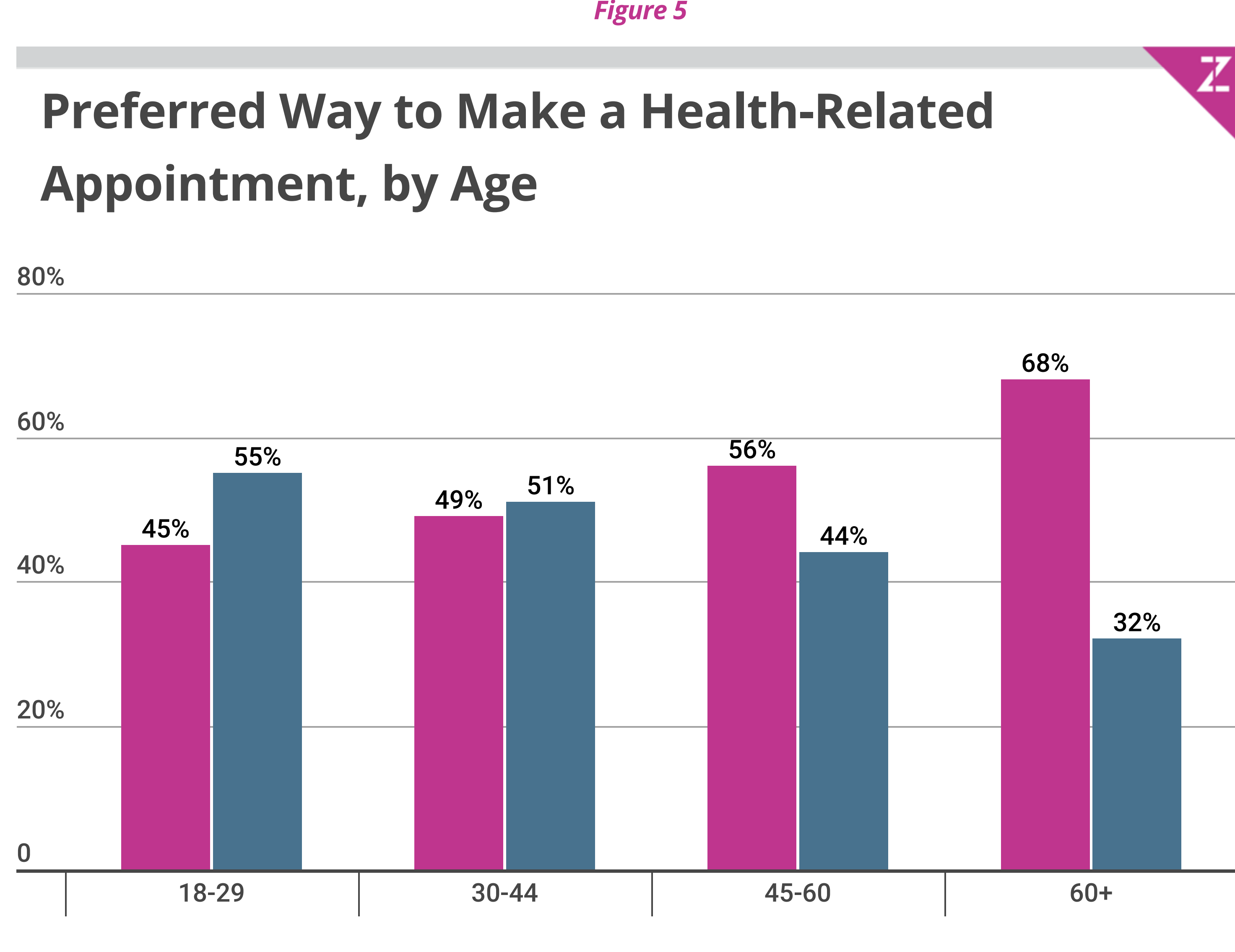
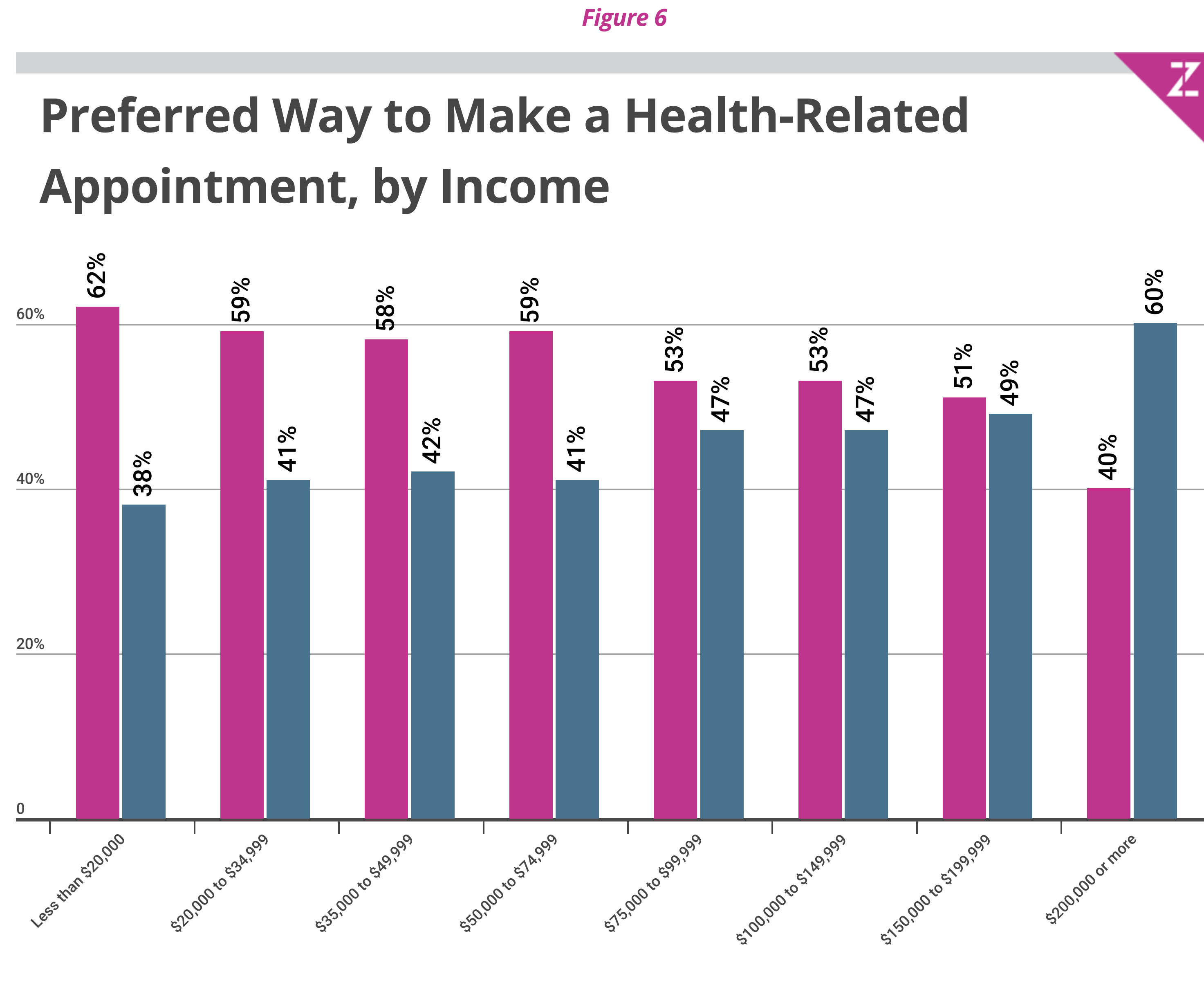


Figure 6



Our data provides little room for equivocation. The younger the person, the more likely they want to go online to make a health appointment. And the older they are, the more they want a phone conversation—only 32% of people 60 and over prefer digital appointments. And this is accentuated by the fact that people 60 and older are more likely to need health appointments. However, this picture is subject to change not just because of increasing technology adoption but because millennials are likely to cling to online technology as they age.

Income is another strong predictor. The higher your income, the more likely you are to want to use your phone or computer to set an appointment—60% of people who earn more than \$200,000 want to make their health appointments online.

PUTTING THE DATA TO WORK

The implications of our findings for managing and marketing healthcare organizations are three-fold. First, health organizations really have no choice but to move expeditiously to allow for online appointment setting. Young people and high-income consumers are clamoring for it—and may look elsewhere if they're not accommodated. Health institutions resistant to providing online appointments will find themselves at a disadvantage when competing with technologically savvy organizations. Second, even health organizations that serve low income or senior populations need to get on board; lower income segments still desire to make appointments with their electronic devices at rates topping 40%, while people 60 and over have the least desire to make online appointments. Third, when designing online appointment systems, it is imperative to create a true online booking application, not just an online system that operates as a messaging app, which then will be followed up by email or phone. Consumers desire more convenience, not additional steps.