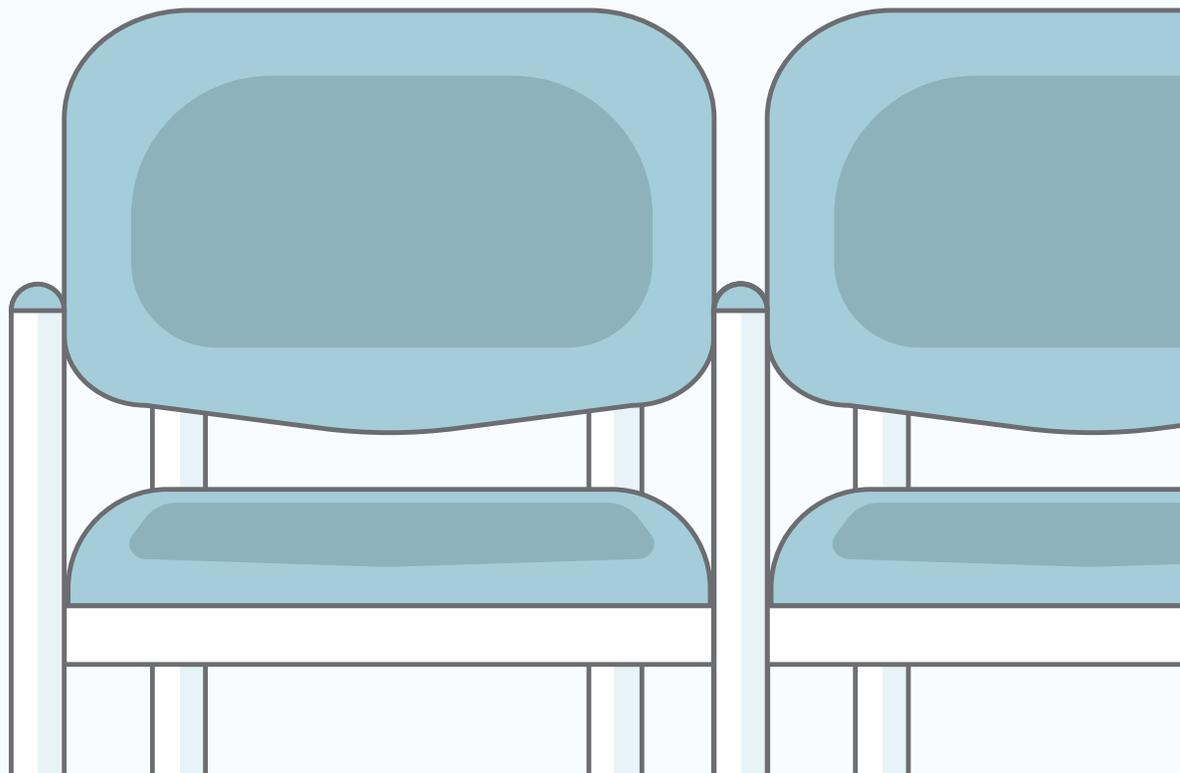
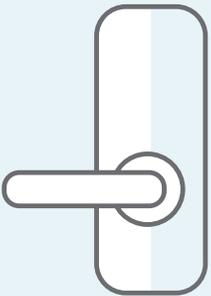


sequence

NO ROOM FOR WAITING

A closer look at the opportunity to modernize doctor visits to meet today's tech-driven consumer expectations.





It's a typical Tuesday morning in the Bay Area. You wake up and put on the new sweater that came in your personalized Stitch Fix delivery. You reply to your therapist on Talkspace and head to work. When your stomach grumbles at 11:30, you order a sweet potato burrito from Sprig which arrives to your office in less than 20 minutes — which is a good thing, because you have to book it to a client meeting in an hour. You request Uber for door-to-door transportation to avoid parking problems. For peace of mind, you check Waze to estimate your arrival time for the meeting. On your way back to the office, you pull up OpenTable and make dinner reservations for the night — oh, which reminds you, you're almost out of dog food. Since you won't have time to run to the store after work, you schedule an Instacart delivery for 10:00 p.m. The next morning you don't feel so hot. You reach for your phone, but instead of choosing from a folder full of helpful apps, a more frustrating journey begins.



These days, almost anything we need is a tap or click away. We live in a world of on-demand, personalized experiences, from grocery delivery and ride requests, to styling subscriptions, errand outsourcing and text therapy. But healthcare remains behind the curve.

The simple truth is that tech-enabled consumer experiences have changed our expectations as a society. We expect to have more control over when and where we have these experiences. And we want easy access to information about these transactions - timing, cost, choice and other details. While more and more industries modernize, health care remains woefully behind. The doctor appointment experience — from self-diagnosis to follow-up — fails to meet today's new standards for convenience, information and speed.

Sequence recently conducted a survey to explore patient behavior and expectations related to one basic experience within the health care system: the doctor's appointment. We asked more than 2,000 consumers questions related to the end-to-end journey to the doctor, from scheduling to follow-up. We found that the common thread and pervasive pain point throughout was fairly simple, but quite meaningful.

Sixty-three percent of people reported that their biggest stressor is **waiting**, and all of the uncertainty that it causes. Numerous studies indicate a correlation between the stress of uncertain settings and experiences and health outcomes.

Studies have proven that stress can weaken the body and immune system, which is the last thing anyone needs as they address their health. How can we reduce the peripheral stress associated with the basic doctor's appointment to provide a more personalized, human experience and deliver better outcomes? We've explored patient insights throughout the doctor's appointment experience to uncover answers and possible solutions. Let's look at six steps in this experience to see what patients had to say.

SYMPTOM CHECK (AM I DYING?!)

With the wealth of information available on the Internet, it has become something of a cultural norm to self-diagnose — or, more likely, misdiagnose — our own ailments.

70%

Of **people** surveyed say they spend time researching their condition online before even contacting their health care provider.



54%

Do not write down their symptoms or prescription drug regimen before going to the doctor's appointment.

This time researching could be better spent consulting a nurse or doctor.

Despite the fact that one in three Millennials prefer to use their Health Care Provider's website to schedule an appointment...

88%



Of **doctor's appointments** are still scheduled by phone, subject to wait times and potential back-and-forth.

This is in stark contrast to the now-common consumer practice of booking restaurant reservations, hotel rooms, flights and pretty much anything else online.

SOMEBODY CALL A DOCTOR



MORE THAN

18,000,000

diners use OpenTable every month to make reservations at more than 36,000 participating restaurants.¹

80%

of **travelers** use an online source to book and pay for a trip.²

ARE WE THERE YET?

Illness may not wait, but patients certainly do. And they're not happy about it.

85%

Of **people** reported seeing their health care provider anywhere between 10 to 30 minutes past their scheduled appointment time.

Google has found that people will visit a website less if it loads 250 milliseconds slower than a close competitors site.³



SETTING EXPECTATIONS

61%



would prefer a text alert before they leave home, knowing full well that they won't be seen on time.

55%



wish they had access to estimated wait times through a screen in the waiting room to help manage their expectations.

Combine waiting room time — often surrounded by contagious patients — with travel and parking time and often unclear office locations, and the overall time investment could become prohibitive. There's a lack of control from the entire process, which creates unnecessary stress and anxiety. Consumers are accustomed to having more transparency and control over the check-in process.

Take the increasing presence of kiosks, especially at airports. Three-quarters of airports expect most passengers to use self-service check-in kiosks by 2017⁴. Transportation services like Uber and Lyft allow users to request a driver based on their location, then manage their expectations of pick-up and arrival times with real-time location tracking.



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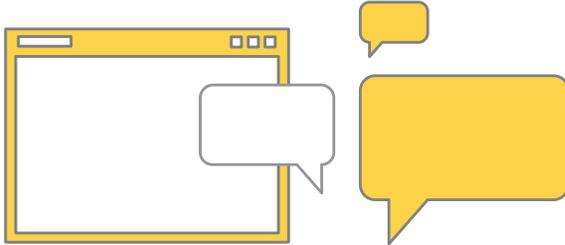
63%

of **patients** reporting that waiting is the most stressful part of the doctor appointment experience, it is clear that there is room for improvement.

45 MINUTES

is a long time to wait in a line. But Disney theme parks have made the wait as pleasant as possible, and people still report being pleased even while waiting for nearly an hour.⁵

Another breakdown in the patient journey is communicating the purpose for the doctor visit and checking in to the appointment.



FORM OVER FUNCTION

■ 70%

Of **people** explain the purpose for the visit to the receptionist ahead of time

▨ 33%

say they document this information through an online health portal.



34%

say they are confident that the person behind the front desk knows who they are and the reason for their visit.

MISSING INFORMATION



26%

say they always have to show their most current insurance information.

REDUNDANT EFFORTS



23%

say they need to repeatedly provide or enter the same information on multiple forms/multiple systems.⁶



That's nearly **one in four** people who are repeatedly asked to waste time at this stage of the doctor visit.



Consumers are increasingly comfortable with sharing personal information online, even when it comes to more sensitive information like financial or health records.

60%

of **U.S. adults** say they track their weight, diet, or exercise routine.⁷

1/3

of **U.S. adults** track health indicators or symptoms, like blood pressure, blood sugar, headaches, or sleep patterns.⁸

Having a centralized source of personal records would save time for both doctors and patients.

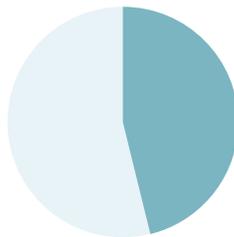
CHECKING OUT

05

THE COST OF CARE



Have you ever had that moment when leaving the doctor's office where you're not sure if you need to sign out or pay up? You're not alone.



< 1/2

of respondents said they were clear about how much they had to pay upon leaving the doctor's office.

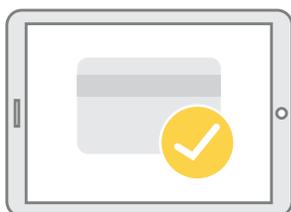
Lack of clarity surrounding the price of tests and treatment, as well as an inconvenient checkout create additional waiting and uncertainty.

38%

of **millennials** were stressed out about not understanding their out of pocket expenses.

33%

would prefer to use a mobile pay solution to quickly determine these costs.



For consumers of any age, saved payment information and the ability to review and edit before committing has become standard in the world of e-commerce, from Amazon to app-based services like instacart. Users are no longer tolerant of billing surprises. And they are becoming increasingly comfortable with making payments on their devices.

Once a patient leaves the office, accessing their doctor isn't always easy. This could prove troublesome.

10%

of **millennials** admit to not understanding what's being said to them during the visit.

15%

are unclear on follow-up steps.

RECOVERY MODE



ALMOST 1/2

of respondents said they would like to have follow up information or communication via a secure web or mobile portal.

Apps like TalkSpace allow users unlimited messaging to their therapist with up to two responses guaranteed daily, creating peace of mind and allowing for communication that more closely resembles today's interactions.

CONNECTING THE DOTS IN DIGITAL HEALTH

The digital health market continues to grow at a strong clip, and consumers are increasingly getting comfortable with digital health tools. According to Rock Health, 80% of Americans have utilized one. While online health information remains the most popular tool, there is an uptick in the adoption of health reviews, mobile health tracking, telemedicine, and others.

For each of these categories, there are multiple options for consumers. Apps like ZocDoc or Amino are among many that can help you find and review a doctor in your community. Doctor on Demand or Heal and others are now

offering home visits by physicians. And some health care providers like One Medical Group and Dignity Health are taking the lead in delivering a more connected patient experience.

But as the health industry continues to shift towards electronic health records and digital tools, these various health care experiences remain disparate and disconnected. The key to reducing stress in the average patient experience is to connect all of the different steps to ensure that accurate information is captured and communicated at every step of the process.

SOURCES

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- 3: The New York Times, For Impatient Web Users, an Eye Blink Is Just Too Long to Wait, February 29, 2012
- 4: Kiosk Marketplace, SITA airport trends survey: 86 percent plan investments in kiosks, self-service, November 4, 2014
- 5: Washington Post, What really drives you crazy about waiting in line (it actually isn't the wait at all), November 27, 2015
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- 7: Pew Internet, Tracking for Health, January 28, 2013
- 8: Pew Internet, Tracking for Health, January 28, 2013



Patients are consumers and it is time for the health care experience to match the consumer-grade experiences that people expect today. Improving the experience could drive down costs, improve patient satisfaction, and inspire proactive well-being.

What makes an experience meaningful, memorable and even enjoyable? A thoughtful combination of people-first design thinking, technology and communication. When we glide intuitively through a process without friction points — when we have the information that we need, at the exact moment that it is most useful — our expectations shift. And for organizations businesses to be successful, they must shift to reflect the people they serve. When their customer's health is at stake, it becomes even more critical.

Sequence surveyed more than 2,000 U.S. consumers over 18 years of age on their impressions of connected patient experiences in early 2016. This survey was completed online and responses were random, voluntary and completely anonymous.

