The New Patient Journey
From Searches to Answers
A defining human characteristic is that we all ask questions.

We want to know something.

We want to go somewhere.

We want to find answers.

Until more recently, humans have asked other humans questions — and received answers and advice from each other — mainly through person-to-person connection and communication.

Today, digital devices and AI-powered services are encouraging even more discovery, more answer-seeking, and more connectivity than ever before.

This is no different in healthcare. People are asking questions to learn more about a diagnosis. A symptom. A doctor. Historically, information to supply answers to these healthcare questions has been owned by the elite few — mostly doctors and other experts who were the authorities on their subject matter.

Now questions about healthcare are becoming more complex. And people want to be able to find information in more places. Authority and ownership over answers has become less clear (have you ever wondered, “Where did Google get the phone number for that doctor?”). As an organization, you want to own the experience people have with your brand so that you can provide answers to the questions healthcare consumers are asking. You want to ensure that you can match the right patient to the right provider for the right condition. You want to drive patient acquisition and optimal patient experience.

The patient journey starts with a question. Healthcare revenue follows.

But it is becoming increasingly difficult to manage all of the channels people are using to look for answers, and even more important to manage the information that powers those answers everywhere that patients are searching.

With patient acquisition as the primary focal point for your healthcare organization, it is now imperative to understand the patient journey, how patients ask questions about their healthcare, and how you can be the authoritative answer to those questions. The more opportunities you have to answer a patient’s questions with convenience and ease, the greater your chances at acquiring that patient now — and in the future.
Yext launched a survey in January 2019 of 1000 respondents who had searched for healthcare in the last 12 months. This is our third survey in our patient journey series: 2016, 2018, and 2019. We have gathered data year over year to benchmark and understand the customer journey as it evolves.

Our findings suggest that today’s patients are relying heavily on digital resources to help them select providers. As a result, those health systems that have structured their data and anticipated patient questions are the ones optimally set up to provide the best answers everywhere patients are searching, and to set themselves up for improved patient acquisition.
Today, we’re hearing patients referred to as “consumers” far more than in the past. So for the remainder of this whitepaper, we will use the terms “patient” and “consumer” interchangeably. This is important to note, too, because the patient journey is very similar to the consumer journey. The way a patient searches for healthcare closely mirrors the way a consumer searches for a product on Amazon, or any other shopping site.

Our research suggests that patients today are not following a linear path to healthcare information, but are instead consulting far more resources and relying more on digital options to help them select a provider. It also suggests that those health systems which are set up to provide the best answers everywhere will best set themselves up for optimal patient acquisition in the future.

According to the Kaiser Family Foundation, 56% (183M) of the US population (327M) are commercially insured. As healthcare organizations continue to face diminishing reimbursements from Medicare and Medicaid, a new remit is to seek a patient mix that allows for commercially insured patients to offset the decline in Medicare and Medicaid reimbursements.¹

Given 76%² of the US population is online, by rough estimate almost 140M commercially insured people are online, as compared to only 90M who are publicly insured.³

With a larger population of commercially insured, it’s likely there are more commercially insured people online than publicly insured.

This fact (coupled with consumer behavior trends that favor digital channels as the go-to method of finding answers), means that health systems have a distinct opportunity, not only to reach prospective patients, but also to ensure that those prospective patients have the ability to drive revenue for the health system by digital means. Healthcare organizations can grow in volume by understanding their payer mix, and by ensuring that searching consumers find the right answers – ultimately matching the right doctor to the right patient for the right condition at the right time.

If you aren’t focusing on the digital patient and how to answer their healthcare questions, you risk losing patients – and revenue – to organizations that can.
How can healthcare organizations achieve this?

Let’s take a look at the new patient journey.

The new journey looks a lot like an accordion. The patient journey starts with a question — any question — related to a symptom, diagnosis, doctor, etc. The question is often asked of a search engine, which then channels the searching consumer to different resources (e.g., blog posts, videos), before the searcher returns to the search engine to ask another question. The process repeats itself over and over again until the searching consumer finds her answer, selects a provider, and takes an action (i.e., makes an appointment).

This is an evolution from how patients used to seek care. In the past, a primary care provider would make a referral, and the patient would likely make an appointment with that doctor. Today, the patient seeks convenience and wants to know as much about her provider as possible. Just as she would search for a product on Amazon, she researches and compares providers, and then makes a decision based on many factors, including types of insurance accepted, proximity, provider ratings, and level of expertise. The way she seeks answers to those questions is by consulting her resources. She is an ever-connected consumer looking for the right provider to treat her condition or need.

Consumers ask questions on search engines.

Almost 80% of consumers start their healthcare journey by asking questions in search, and 68% of these searches are performed on mobile devices. And it’s no surprise that the older the consumer, the more she is searching for healthcare, even on voice devices. Yext’s findings show that for patients who have asked a healthcare-related question using voice (Siri, Alexa, Google Assistant, et al.) in the last 12 months, there was more than a 12% increase in searches for healthcare from the 65+ age group, and a 22% increase from the 35–44 age group.

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The Patient’s Digital Search Journey Starts with a Question
What kinds of questions could a consumer be asking?

Depending on where the consumer is along the patient journey, the questions are vast. Someone might be searching for the cause of certain symptoms:

What is the pain in my head is it migraine?

Or could be new in town and searching to find a primary care provider:

Who is the best primary care provider near me?

How to choose a primary care physician
Primary care physician near me
Family doctors accepting new patients near me
How to find a good doctor in your area

Compared to 2018’s research, we found a 9% decrease\(^8\) in people who had a doctor in mind before searching. In 2018, 54% of people had already selected a doctor before conducting a search.\(^9\) But in 2019, more than half of the respondents (50.5% to be precise) did not have a doctor in mind before searching.\(^10\) This suggests that patients are increasingly relying on search to guide them to the right provider — making it all the more important to ensure that accurate information about your healthcare organization shows up for patients, no matter where they search.
Of course, a consumer doesn’t just ask one question when searching for healthcare; she’s asking many questions.

Let’s take that primary care example. If she searched for the “best primary care provider near me” first, what would she do next? Her search results don’t seem to provide a strong answer, so she may ask another question:

“What is the best primary care provider that accepts Blue Cross Blue Shield in Massachusetts?”

The intent in this search is to find the best primary care provider in the state of Massachusetts who accepts Blue Cross. But she is not yet satisfied, because although she’s gone to the Blue Cross directory, she’s not sure the information is correct, or if the primary care provider she’s selected is actually the right one for her.

So, she returns to search yet again to ask another question:

“Where is Mark Johnstone MD’s office in Boston?”
Now it looks like Dr. Johnstone is close by, but how can this patient be confident that Mark Johnstone is good enough to visit?

“*What are Mark Johnstone MD’s Boston Star Ratings*”

In this case, the patient is looking for Mark Johnstone and wants to make sure that Mark is local (convenient), accepts Blue Cross insurance, and has good ratings. From our 2019 study, more than 70% of respondents indicated that reviews were somewhat or very important to the selection of a provider. We also saw that both the 35–44 year olds and the 55–64 year olds consult healthcare-specific websites more than general respondents. These healthcare-specific websites usually have more reviews of providers and can offer more details about the provider than a simple search on Google. We believe these two age groups are looking for certain things. The 35–44 year olds are likely starting families or have young families, so they do more research on behalf of the family (especially if they are new mothers). The 55–64 year olds, meanwhile, are likely encountering more healthcare needs, so they are performing more searches and becoming more discriminating as they choose providers.

It’s in this moment that a health system can either take control of the patient experience or leave the control to third parties (we see this in Figure 2, with Vitals showing up as the first search result). To take control of the search engine results, you must have first-party reviews added to your provider pages, as well as appropriately structured, up-to-date Schema mark-up.

These consumers are also asking questions through voice search. In fact, we’re seeing heavy growth in healthcare searches on voice devices. With one in 10 people asking a question of a voice assistant today, our 2018 research showed that the biggest increase in people asking healthcare questions occurs in the 35–44 year old and the 65+ year old age groups. Year over year, we saw a 14% increase in voice searches for healthcare among 35–44 year olds, and a 27% increase in voice searches for healthcare among those 65 and up.

Search is no longer limited to desktop or mobile. Voice devices are becoming a strong player, and they are training consumers to search differently. Consumers want answers whenever and wherever they ask a question, and because it’s so much easier to ask a question of a voice assistant (rather than typing on a tiny screen), adoption of these services is soaring.
“Alexa, what time does Dr. Mark Johnstone’s office open today?”

“Dr. Mark Johnstone’s office in Boston is open from 9am today until 6pm this evening.”
Is your website an Answers Engine?

We’re seeing fewer patients visit a healthcare organization’s website before making a decision. Only about 23% of respondents indicated that they visited a health system website before taking a healthcare action. So it’s incredibly important to ensure that you can answer the questions consumers ask about their healthcare directly on third-party sites. You don’t want to leave that experience up to third-parties to own.

But for the almost one in four who do visit a health system website, it’s important to provide the exact same brand experience on your site as you would off of it. These consumers exhibit certain behaviors and have certain expectations about how they want to find information on your website. Only 18% of people wanted to click on links without searching, while 46% of people said they want to use search to find what they are looking for on a health system’s website. Interestingly, only 1% of people were interested in using a chatbot to find what they are looking for when they arrive on a healthcare website.

If and when a consumer reaches your website, it’s important to make the patient experience easy and convenient, so that you can match the right patient to the right doctor for the right condition.

So if a consumer reaches your homepage and not a provider page, and almost half of those consumers want to search, how are you answering questions for those consumers? Consumers have been trained over the last 20 years to ask questions of Google, and other search engines and websites. Yet when they arrive on a healthcare website, they find the experience to be largely disappointing.

Is your website an Answers Engine?

Taking the example above, let’s say our patient is one of the four who does visit the health system’s website. When she arrives on the website, she wants to find out more information to validate what she’s found on the internet. Maybe she goes to the homepage and clicks on a link to Find a Doctor — in that case, she may start her search all over again.

For over 20 years, she has been trained to search on Google by asking questions and to ask many broad and narrow questions in no particular order. But now that she has landed on a health system website, she can’t ask those same questions. She is funneled into a very rigid search experience that doesn’t allow her to ask any questions about the specific doctor, the insurance accepted, or even whether the doctor is the right doctor for her!
Instead, as with most health system websites, she is told to input a specialty or a doctor’s name. But she wants to know more about Mark Johnstone and whether he is a good primary care provider. What she may want to do instead is to ask a question on the Find a Doctor: “Is Mark Johnstone a good primary care provider?” or “What is Mark Johnstone’s phone number?” But in this experience, she can’t ask either question because she is forced either to select a specialty or a provider and then do research from there.

Most health system websites are not Answers Engines—and they certainly aren’t providing search-first experiences for their consumers.

So our consumer may likely go back to Google to find another doctor. In a competitive healthcare landscape where consumers are more empowered to find information and are financially responsible for more of the healthcare bill, this is a likely scenario and one in which you may have just lost a patient — and the associated revenue.

With more commercially insured patients using digital channels to find healthcare, do you want to risk this potential revenue loss because you couldn’t facilitate the most convenient patient experience and answer questions for your healthcare consumer?
If patients are asking questions, how can you make sure you are providing the right answers anywhere and everywhere they are searching?

1. Structure your data.

Google, Alexa, Siri, and most other channels consumers use to search, accept data in structured formats. The more you focus on structuring your data, the better opportunity you have to build relationships among your data and to connect the dots between how patients are searching and what they’re looking for. A consumer might, for example, ask a question about primary care: “Where is the nearest primary care provider rated four stars or above who treats eczema?” Your data needs to be housed in a platform that can accommodate for location [near me], provider type [primary care], rating [four stars], and condition [eczema].

2. Answer questions on third-party sites and voice devices.

You can’t control where a patient is going to look for information about you, nor can you control the questions she might have about the healthcare she wants to receive. It’s important to take your structured data and syndicate it to third-party sites and to voice assistants like Alexa, Google Assistant, and Siri. How do you know where to find what patients are asking today? Consult your analytics and your AdWords search data. You will find a treasure trove of information that people want to know today that you can easily share with third-party sites to ensure you are in control of what answer a patient receives. This also includes managing reviews on third-party sites (i.e., responding to and proactively engaging with people who are leaving reviews about your providers and locations). Patients ask questions that are influenced by reviews and ratings, so it’s important to manage these reviews in a way that helps your providers and your system stand out when a consumer is doing her research.

3. Tag your provider pages.

Assume providers are local representatives of your healthcare organization. Just as a retail brand would ensure that a local storefront has stars in search, your providers need to also maintain a local presence. Patients and consumers want their healthcare to be convenient and ‘near me.’ They are also looking for varied and personalized needs, such as “Doctor who treats wrist pain who accepts blue cross” or “Best mitral valve repair surgeon who works at Mt. Sinai and went to Harvard.”

With more consumers reaching a healthcare organization’s website through provider pages rather than through the homepage, it’s your responsibility to ensure that your providers are discoverable in search. You need to own this experience, not let a third-party own it for you.
The best way to accomplish this is to focus on three things:

- **Create provider pages that are flexible, nimble, and able to pull information from your structured dataset to answer the questions patients are asking.**

- **Add Schema tags to your provider pages, not only to meet the latest search engine guidelines and algorithmic needs, but also to make sure that you are able to feed data to voice devices.** Note, however, that Schema tagging isn’t a “one and done” initiative. You have to constantly monitor for changes in the mark-up language to ensure maximum provider discoverability and that your providers don’t drop from search.

- **Add first-party reviews (CAHPS data through transparency initiatives) on your provider pages.** Some health systems are vehemently opposed to doing this, but this is the new reality of search. Google prioritizes distance, relevance, and prominence as three components of its algorithm, and health systems cannot ignore the fact that star ratings on provider pages are extremely important for search engines when it comes to prioritizing one provider over others.

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4. **Make your website an Answers Engine.**

Websites are no longer the first stop in the patient journey, but they are an important piece of the consideration set for patients and consumers alike. When people visit your website, half of them want to search to find more information. They are coming to your site to validate the information they have found elsewhere, online and offline. Make your website stand out by providing answers to patient and consumer questions. By becoming an Answers Engine, you will delight your patient, and reduce the need for them to bounce off your site (and possibly go to another health system or seek a competing provider). Focus on the questions patients are asking today and anticipate the questions patients will be asking in the future. Feed your website with data so that you can provide search-first experiences.

Only you have the power to own your patient and consumer experience. If you can anticipate the questions patients are asking, you can state answers with confidence.
Sources


3. Based on US statistics on internet usage according to the Statista study (footnote 2) as applied to estimates of the proportion of the US population that is commercially and publicly insured according to the Henry J Kaiser Family Foundation study (see footnote 1)

4. Becker’s, *Patients have spoken: Online presence is more critical than ever in healthcare*, 2018 https://www.beckershospitalreview.com/patient-engagement/patients-have-spoken-online-presence-is-more-critical-than-ever-in-healthcare.html


The customer journey starts with a question. And consumers expect answers. Yext puts businesses in control of their facts online with brand-verified answers in search. By serving accurate, consistent, brand-verified answers to consumer questions, Yext delivers authoritative information straight from the source — the business itself — no matter where or how customers are searching. Taco Bell, Marriott, Jaguar Land Rover, and businesses around the globe use the Yext platform to capture consumer intent and drive digital discovery, engagement, and revenue — all from a single source of truth. Yext’s mission is to provide perfect answers everywhere.

Yext has been named a Best Place to Work by Fortune and Great Place to Work®, as well as a Best Workplace for Women. Yext is headquartered in New York City with offices in Amsterdam, Berlin, Chicago, Dallas, Geneva, London, Miami, Milan, Paris, San Francisco, Shanghai, Tokyo and the Washington, D.C. area.

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