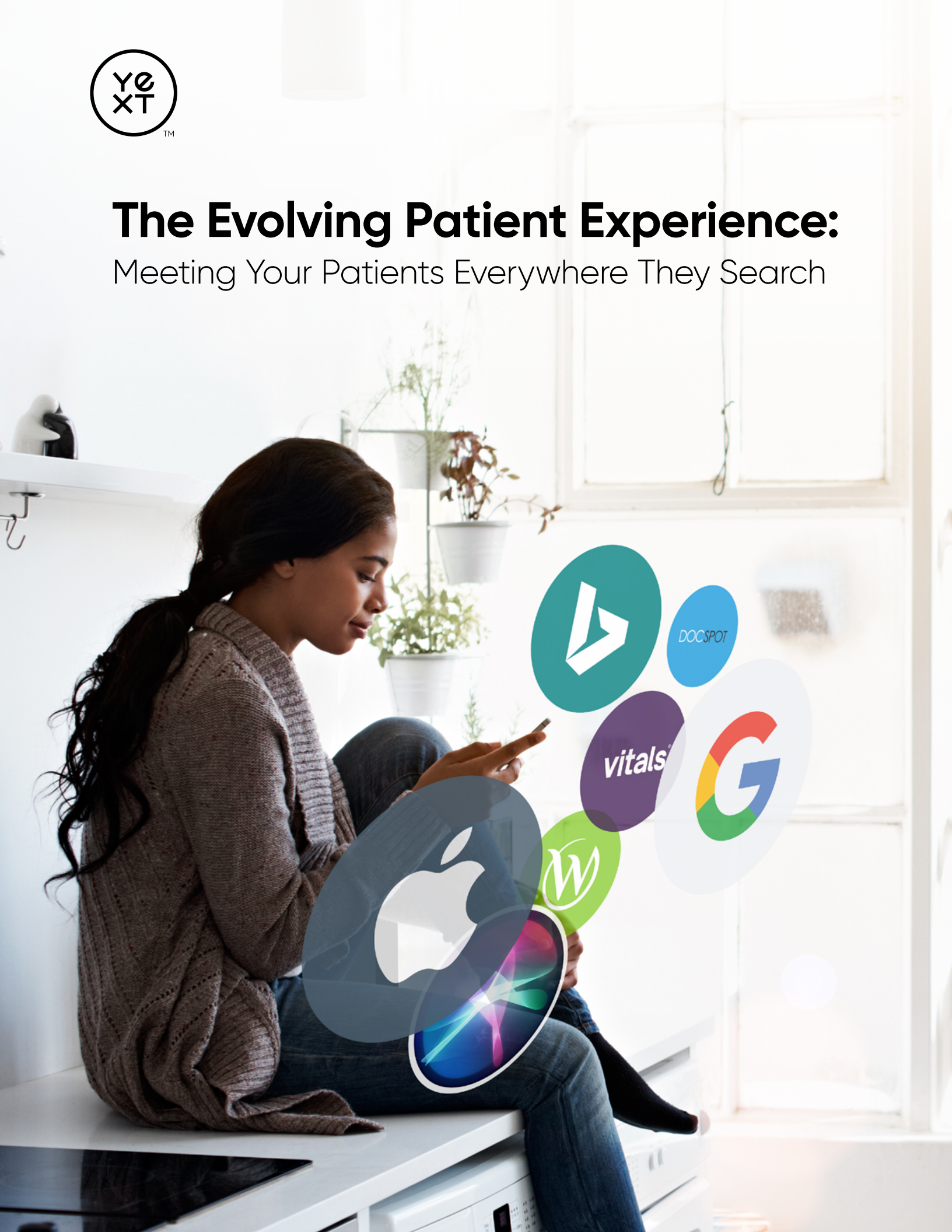




The Evolving Patient Experience:

Meeting Your Patients Everywhere They Search



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The way patients find healthcare information today has changed dramatically. Their attention has become fragmented across an array of intelligent services and devices, and voice searches via Siri, Alexa, and Google Assistant are taking off. Voice search makes up 20% of all Google mobile searches today,¹ and the use of voice-enabled speakers is predicted to [grow by 130%](#) in the next year.² The patient search experience is changing rapidly and your health system needs to know how to keep up with the pace of change.

A year and a half ago, Yext conducted a [survey of 1,000 patients](#) who had gone online to find a physician, hospital, or other healthcare provider in the past 12 months to learn how they search for — and make decisions about — providers. The goal was to explore the online patient journey. In January 2018, Yext conducted a data refresh to better understand changes in patient search behavior. We conducted two studies: one follow-up to our previous study, and one with a focus on voice and intelligent systems.

When making healthcare decisions, the patient has more considerations, inputs, and uses more devices than ever before. To ensure that patients have all the necessary information at moments of intent, health systems need to manage their digital knowledge — especially about their providers — across all platforms and devices, everywhere patients search. To make critical healthcare decisions, patients need to be able to easily find

and access digital knowledge attributes about providers, such as primary location, where and when a provider sees patients, physician credentials, and even what type of insurance the provider accepts.

In this report, we break down the results of our Patient Search Behavior Survey to help you understand the changes you should make to improve the online patient experience — starting with search. We also share some initial insights into our Patient Voice Search Behavior Survey (1,000 patients in the U.S. who have asked a healthcare-related question using voice in the last 12 months) to showcase the shift in the devices patients are using to search for their healthcare.

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“It is not enough for healthcare marketing teams to focus only on website development, as patients are primarily finding information about providers outside of the health system’s website. As patient discovery continues to evolve based on device usage and how the patient finds providers online, it is all the more important to ensure patients are able to access providers anywhere and everywhere a patient seeks care.”



– **Carrie Liken**
Head of Healthcare Industry,
Yext

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¹ Google Data, U.S., Google App, Android, May 2016, as reported by [Think with Google](#).

² eMarketer, [“Alexa Say What?! Voice-Enabled Speaker Usage to Grow Nearly 130% This Year.”](#) May 2017.



Finding #1:

Patients Search For Providers

The internet continues to be a major force in patient decisions, especially in the research phase of the patient journey. Overwhelmingly, patients are searching for individual providers (e.g. doctors, dentists) over hospitals or other healthcare facility locations.

In our [2016 survey](#), and now confirmed by our 2018 study, roughly 76% of individuals reported going online to find an individual provider, versus only 30% that searched for a facility (respondents could select multiple options). Patients are searching for providers that are “near me,” “accept my insurance,” and have relevant expertise. If the patient can’t find this information upon first search, it is possible that your providers will miss out on as many as three out of four potential patients.

If detailed provider information isn’t easy to find upon first search, providers may miss out on as many as **three out of four** potential patients.

Recommendation #1:

Know where your provider data lives and map your patient’s journey to your health system.

Identify how patients find your providers today and ask yourself whether you can make it easier to discover your providers.

Physicians play the central role at every phase of the patient journey — from how patients search for healthcare, to how they receive care, and why they choose to come back. Digital Knowledge Management (DKM) is a necessary tool for health systems to meet their patients wherever they’re searching.



Finding #2:

Patients Find Information Outside of Providers' Websites

Health systems focus a lot of energy on ensuring their owned website is designed and redesigned, but 83% of patients are increasingly finding information about providers outside of the system website. In our 2016 survey, when we asked patients about what online resources they used when selecting a healthcare provider, the top three most popular responses were search engines (50% of respondents), hospital or physician's office websites (41%), and healthcare directory and reviews sites (20%). Now, in 2018, when asked the same question, the three most popular responses were search (67%), healthcare articles (54%) and doctor's profile pages (17%). Strikingly, the amount of people viewing doctor's profile pages decreased by 57% year over year.

This reflects a change in the digital patient journey. When a patient recognizes that they need medical attention, their first destination is a search engine, where they search for an individual provider. Increasingly, those search engines are providing patients with direct information in the form of maps results, Knowledge Card answers, and other intelligent services. You can't control how these services function, but you can control the information they know about your health system and providers — but only if your information is accurate and consistent everywhere.

Recommendation #2:

Focus on owning the search engine results page on all pages where a patient might search.

You are the authority on the information about your health system and providers. While you can't control how intelligent services and search engines operate, or which ones your patients choose to use, you can control the information they have access to. Take control with a DKM platform that enables you to update and maintain your data across the digital universe of maps, apps, search engines, voice assistants, and other intelligent systems.

Your website matters, too!

Fewer patients are going directly to physician profile pages for information, but the content on your website still plays a crucial role in helping your information surface in search. Make sure your content is appropriately tagged with Schema markup (a common language for describing data on the web that helps search engines understand your site and its content). Schema markup allows health systems to describe their website content in a way that search engines can understand — so your content will be more likely to show up for a relevant search.



Finding #3:

Patients Expect Online Transactions

Booking appointments are important to both the health system and the patient. The health system used to rely solely on calls and call centers to book appointments, and then moved into quasi-online appointment booking functionality via “request an appointment” forms. Today, the patient is far more interested in booking an appointment online, and is starting to express interest in doing so via voice-based systems.

In Yext’s Patient Voice Search Behavior Survey, 53% of patients said they would be interested in booking an appointment via a voice device if it were available today. This means that the nature of online transactions will continue to evolve. As patients shift to voice-enabled devices, the screen will disappear, but the patient will still demand transactional answers (e.g. “Where is X located?”, “How can I be reminded to do Y?” etc.)

Recommendation #3:

Focus on the transactional answers of today and prepare for the online transactions of tomorrow.

Patients are asking questions today and demanding immediate answers:

Where is the nearest urgent care?

Is this cardiologist located near me?

By ensuring your data is accurate internally and syndicated externally, you can answer those questions that patients are already asking these voice-enabled systems. In the future, by incorporating online appointment booking functionality into your patient flow, and sending that functionality off your website, you will ensure that patients have more opportunities to book appointments, and you will be able to optimize for the device the patient may use in the future (including voice) to make that appointment.

Here’s the nearest pharmacy

53% of patients would be interested in booking an appointment via a voice device if it were available today.



Finding #4:

Patients Value Reviews Less and Insurance More

In 2016, survey respondents reported reviews as an important part of their decision-making process. Health systems were up in arms about how to manage reviews and what the reviews were actually doing to influence provider selection. But the world has settled a bit. In 2018, reviews have become less important to the patient but understanding what insurance is accepted is now of utmost importance.

In 2016, more than half of respondents said that reviews were either “important” or “very important” to their decision, and 77% said that they were at least “somewhat important.”

In 2018, only 32% of respondents stated that reviews were important, and only 17% of patients selected a doctor after reading a review meaning that 83% of people weren’t as swayed by reviews. On the other hand, insurance accepted is a very important consideration to the patient. Having the right information about insurances accepted by the provider is critical in the decision-making process. Our 2018 survey revealed 62% of patients indicated that insurance accepted is very important. 42% of patients would like the ability to ask voice-based devices about insurance, too.

Recommendation #4:

Focus on attributes that are important to the patient.

Every healthcare provider knows that the name, address, and phone number matters for patient acquisition, but things are becoming more complicated now. New digital knowledge attributes like insurance accepted, hours, physician credentials, etc., are also important to surface to the patient.



Finding #5:

Patients Use Multiple Devices To Find Healthcare Information

Of all healthcare searches, 68% of them are done on a mobile device.³ Furthermore, intelligent services and conversational platforms such as Siri, Alexa, and Google Assistant are impacting patient discovery today more than ever. However, sometimes patients aren't looking for providers as much as they just need a quick answer. Voice-based questions and answers are needed to answer these queries, too. Looking ahead to the intelligent future, voice devices are going to play an increasingly important role in the patient journey.

Yext's Patient Voice Search Behavior survey shows that patients today are interested in transactional and reminder-based answers. Patients are asking healthcare-related questions, often to devices with no screen, and they want quick responses.

Recommendation #5:

Take your providers for a test drive on a voice-based system.

Highlight providers in your top service lines and ask Siri, Alexa, and Google Home questions related to those providers. What information do these systems give you? If you find it is incomplete or incorrect, then your patients are most likely encountering that same wrong data. It's important for you to ensure your provider data is pulled together internally and then syndicated in a structured way to these various systems. Voice query growth is happening even faster than mobile device adoption, so it is very important to make sure your data is ready to be discovered by all systems.



³ Search Engine Land, "[Report: Nearly 60 percent of searches now from mobile devices.](#)" August 2016.

Meet Your Patients Everywhere They Search

When patients search for health information, they don't see web results. Instead, they get maps, voice search answers, chats, and Knowledge Cards back — many of which aren't fully controlled today. But you can control the information these services know about your health system by using a DKM platform. The channels where healthcare providers invest their time and effort should match how patients search for, and make decisions about, which provider to choose. Increasingly, those decisions are happening online and through voice.

Providing care is about listening to the patients, and it starts with understanding how and where patients search — and providing them with accurate information in their moments of need.

To prepare your health system for the evolving patient journey, take control over your digital knowledge. Get your data systems fully aligned so you can identify and share everything that's important about your health system. This includes the usual name, address, phone, email, website, and hours of operation. In healthcare, your digital knowledge also extends to doctors' credentials, conditions treated, services provided, affiliations, payment and provider options, medical papers published, and more. Once your health system has control over its digital knowledge, it can optimize for search and voice.

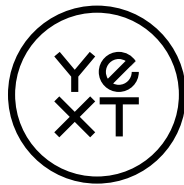
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“Patients now use multiple channels to search for healthcare information: search engines, healthcare articles, providers' websites, and voice search. To neglect any one of these channels is to neglect the patients who use that channel, and the unique position the channel plays in the online patient journey.”



– **Carrie Liken**
Head of Healthcare Industry,
Yext

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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.