



Patient behaviour report

The Changing Patient Behaviour in a
Digital World



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Introduction

Back in 2014, Deloitte's report, *HealthCare and Life Sciences Predictions 2020: A Bold Future?* predicted a future of digital healthcare where technology and human interaction work as one – an “era of digitised medicine”.

“Patients are true consumers, they understand they have options and use information and data about themselves and providers to get the best treatment at a time, place and cost convenient to them”.



Fast-forward to 2018 and you could argue this “future” is already here.

The rise of digital technology has given patients increased access to information, making them more informed and more connected than ever before.

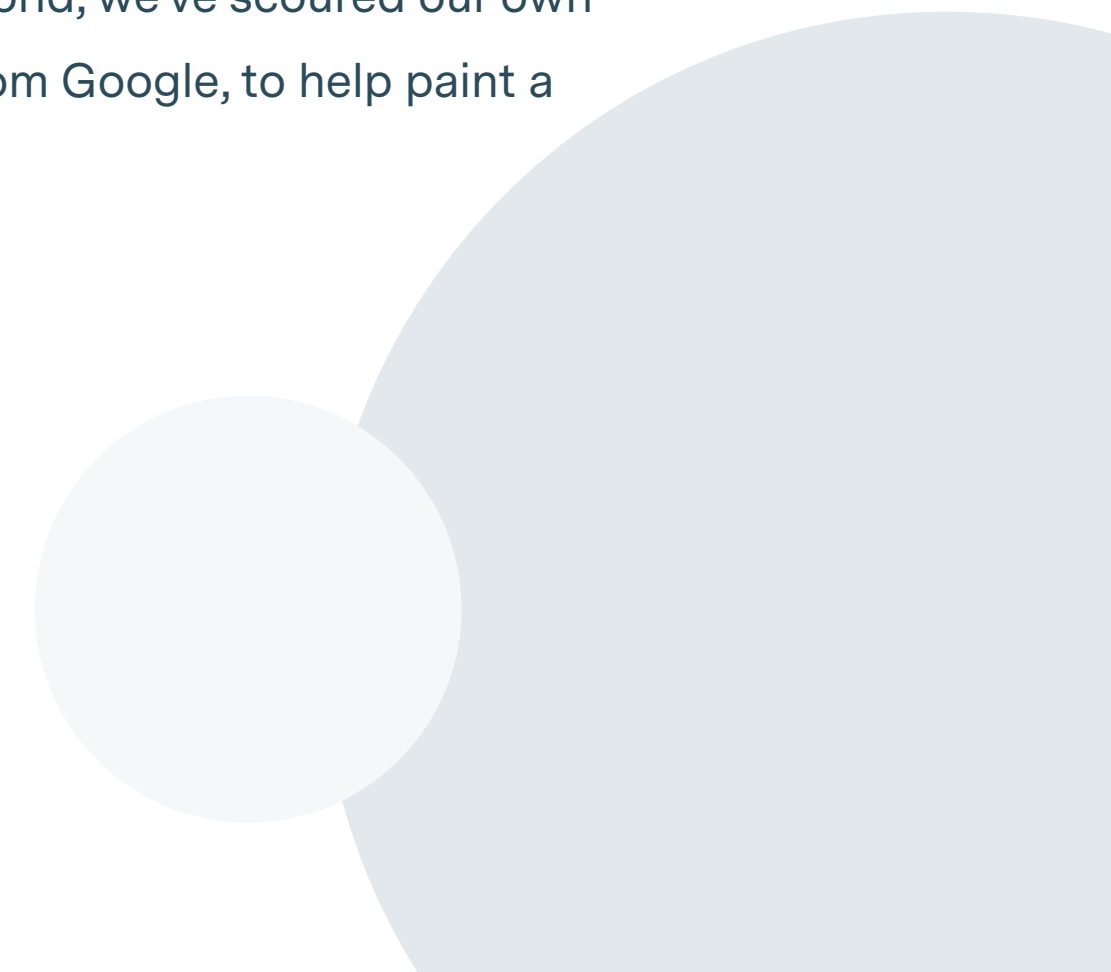
Today’s patients take control of their own health and hold higher expectations when it comes to the level of care they receive.

But what does that mean for practices?

Digital technology is not something for practices to fear, it’s something for practices to embrace, and to harness. As Sara Siegel, Deloitte Partner,

Healthcare Strategy and Consulting says, “Technology alone, such as the smartphone, is not a silver bullet for healthcare. Instead, success lies in the convergence of digital health and human interaction.”

To look deeper into the changing behaviour of patients in this digital world, we’ve scoured our own data, with a little help from Google, to help paint a picture for practices.



How patients find a practice has changed:

77% 

77% of **smartphone users** have consulted their phone to find local health services in the past 6 months

3.1 

Users perform **3.1 searches** when finding a new practice

1 / 3 

Nearly **one-third** of all mobile searches are related to location, not a specific practice

450^k 

Over **450k HealthEngine searches** are people searching without a specific practice in mind



What does this mean for practices?

Google is your real homepage

In today's digital world, more and more people are turning to the web and their mobile devices for every single question and concern, and your patients are no different. With a world of information at their fingertips, modern patients are strongly influenced by what they see online. Your web presence is now more important than your website.

Patients want to see the doctor of their choice

With more informed patients than ever before, gone are the days of simply seeing any doctor - patients want to visit a specific doctor, one they've chosen themselves based on the research they've done online.

KEY TAKEAWAY

In today's fast-paced world, the key to attracting new patients – or retaining current ones – is availability at their time of need.



What patients expect from their practice has changed:

19% 

of **patients switching** clinics say it's because their regular practice has no online availability.

62% 

of bookings are made **after-hours**.

62% 

of online bookings were captured on **mobile devices**.

97.5% 

Online booking is the preferred method with 97.5% of online bookers saying they would make another booking online.



What does this mean for practices?

Patients crave convenience

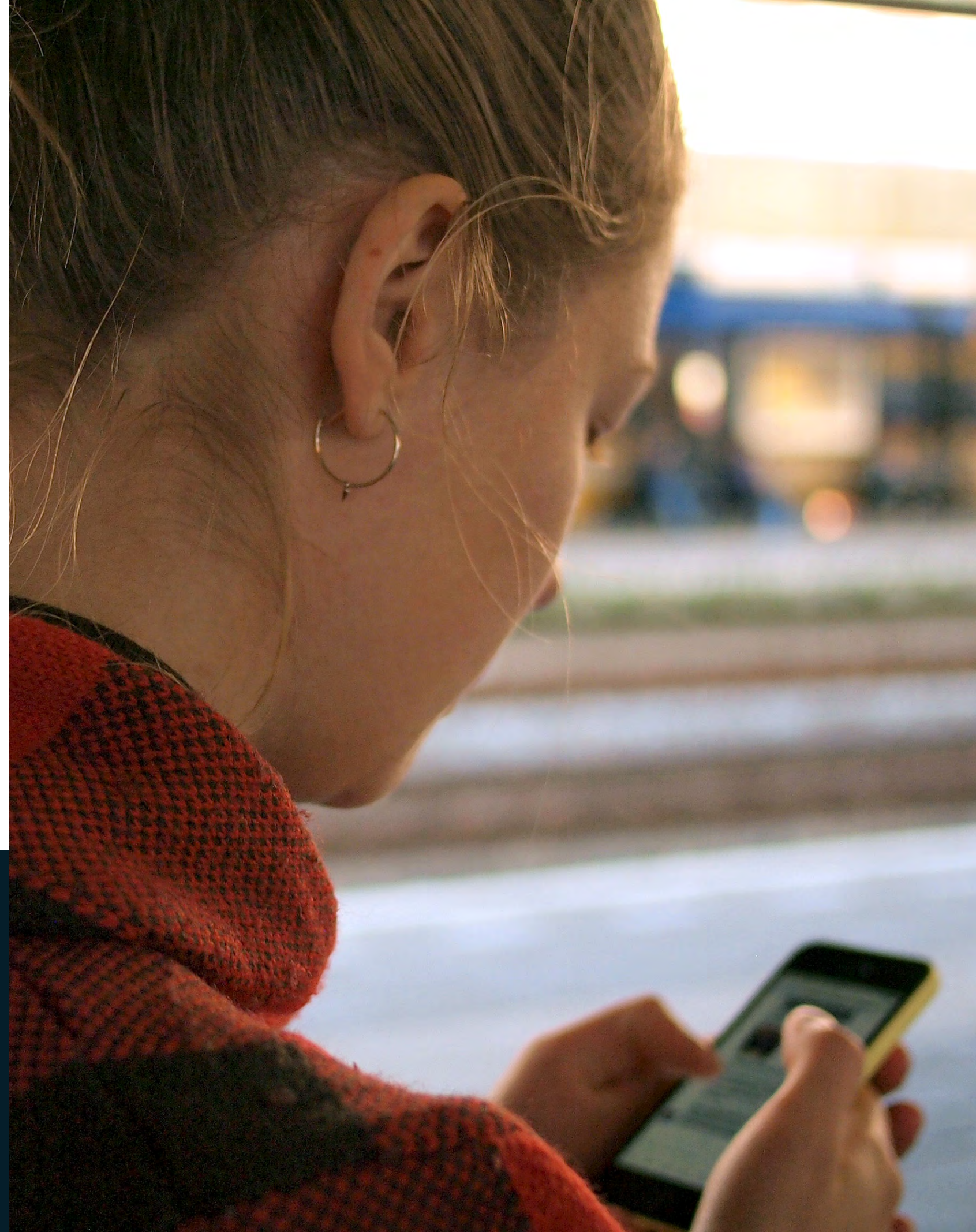
We live in a world where 'now' has become the new yesterday. We're time-crunched, stressed, and overwhelmed. With time so precious, consumers crave convenience and your patients are no different. Availability has become the key to attracting and retaining patients.

Availability is Everything

Patients want the ability to make bookings on the go. With 19% of patients switching clinics say it's because their regular practice has no online availability, patients want the power to book an appointment that's convenient for them at a time that's convenient to them.

KEY TAKEAWAY

With three-quarters of smartphone users turning to Google when booking a practitioner, being visible is the difference between being found and being forgotten.




Who's booking appointments has changed:

25% 

of all bookings are for those **45+ years old** (up from 15% in 2013).

18.6% 

of bookings through HealthEngine are made on **behalf of someone else**.

34% 

of HealthEngine users are **parents** of a child under 18.

70% 

of bookings made on someone else's behalf are for those aged **under 18**.

What does this mean for practices?

It's not just millennials booking online.

Contrary to popular belief, it's not just millennials booking online; older Australians are also embracing the digital life. While their level of online engagement may be lower compared to other age groups, bookings for older Australians are continuing to rise, year after year.



The carry on effect.

With over one third of HealthEngine users being a parent of a child under 18, you often get the family-effect of mother, father and children all booking their appointments at the same practice.

KEY TAKEAWAY

Don't be fooled into thinking it's only millennials who book online, older Australians are also embracing the digital life.




Where patients are booking hasn't changed:

14% 

Less than 14% of over 700k HealthEngine bookings were patients booking at **a practice they hadn't visited before**. (Aug, 2017)

90% 

of HealthEngine patients have only ever **booked** at the **same practice**.

97.5% 

of users say they would make **another booking on HealthEngine**.

4.3 

HealthEngine patients book, on average, **4.3 appointments per year**.



What does this mean for practices?

More choice doesn't lead to a decline in practice loyalty.

With over 5,000 practices listed, and over 1.5 million visitors searching our website each month, HealthEngine is firmly established as Australia's most trusted brand connecting patients to practitioners. And with **90% of HealthEngine patients only ever booking at the same practice**, it's safe to say HealthEngine is actively driving, not disrupting, patient loyalty.

It's not just one-off bookings

HealthEngine aims to build long-lasting relationships between practitioner and patient.

With the average HealthEngine patient booking at the **same practice** 4.3 times per year, HealthEngine attracts loyal, long-term patients, not one-off visits.

KEY TAKEAWAY

More choice doesn't equate to less loyalty. The convenience you offer and the experience you provide is what keeps your patients coming back, again and again.



Summary

Yesterday's patients are today's empowered consumers. They live in a permanently connected world with endless on-demand choices.

With a world of information at their fingertips, modern patients are strongly influenced by what they see online. For practices, this means your web presence is now more important than your website and a strong online visibility is the difference between being found and being forgotten.

Today's patients are time-crunched, stressed, and overwhelmed. With time so precious, patients constantly crave convenience. To attract and retain patients practices must become instantly accessible and always available.

Adapt to thrive

With greater expectations and greater choice than ever before, practices have to adapt to thrive in this new market.

Practices need to embrace, not fear, digital technology, leveraging it to deliver a better patient experience through personalised communications.

As we enter a future of digital healthcare, long-term practice success will come from technology and human interaction working together as one.

Sources:

- HealthEngine Booking and Usage Statistics, 2017
- Google Insights, January and March 2017
- [Micro-Moments Guide: How Australians Find and Choose Health Services](#)
- [Deloitte: Healthcare and Life Sciences Predictions 2020. A bold future?](#)