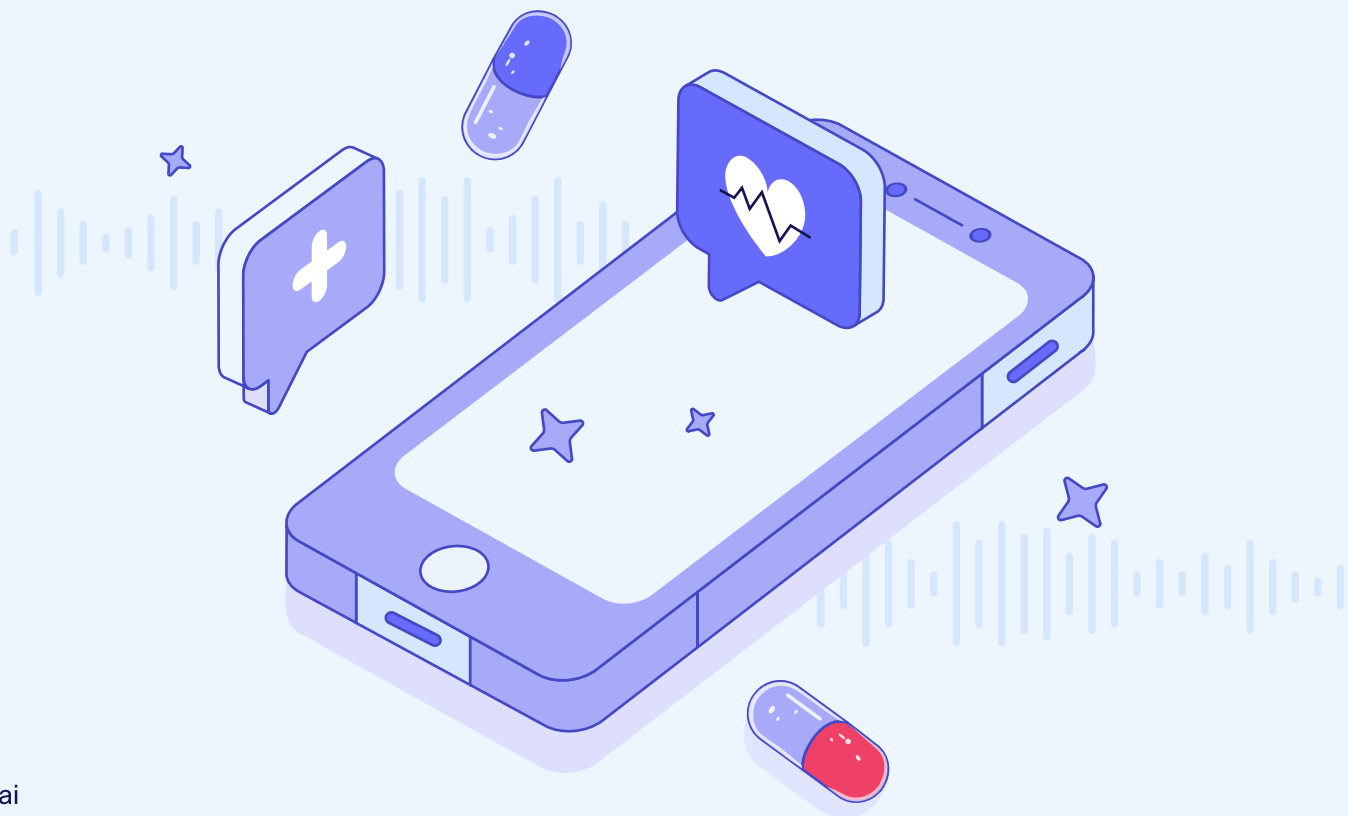
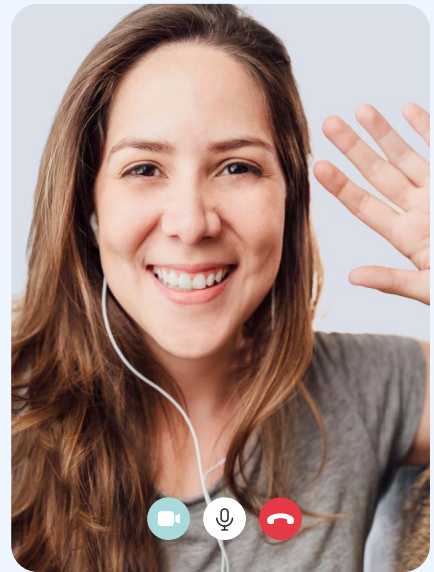




INDUSTRY REPORT

# The *Voice* of The Patient

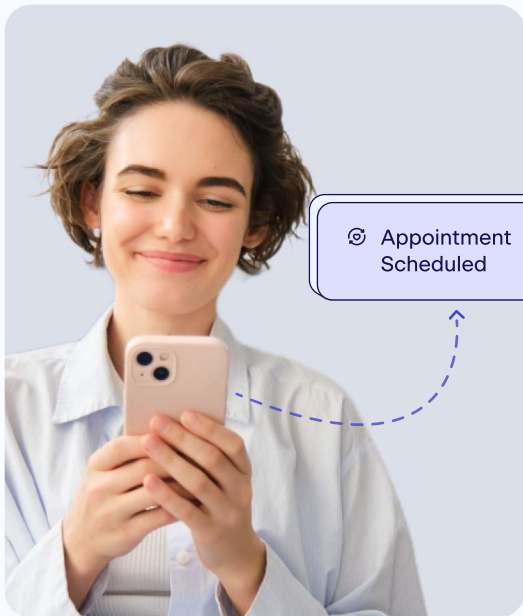


# Table of Contents

<b>+ CHAPTER 01</b>	<b>Introduction &amp; Key Findings</b>	<b>2</b>
	Giving Patients a Voice	3
	Key Findings	4 - 5
<b>+ CHAPTER 02</b>	<b>Beyond the Bottom Line</b>	<b>6</b>
	The Ripple Effects of Appointment Friction	7 - 8
	A Language Barrier	9
	Select, Book, Verify: Patients Want Easier Online Scheduling	10 - 12
	If You Build It, They Will Come	12
	High Need, High Demand: Specialties Patients Seek Most Often	13
<b>+ CHAPTER 03</b>	<b>Prescription Pitfalls</b>	<b>14</b>
	Why Patients Struggle to Get Their Meds	15 - 18
	Simplifying the Script: Streamlining Prescription Management for Patients	19 - 20
<b>+ CHAPTER 04</b>	<b>AI Revolution</b>	<b>21</b>
	The AI-Powered Digital Front Door	22 - 23
	Patients: Love the AI, but Need Reassurance	24 - 27
<b>+ CHAPTER 05</b>	<b>Conclusion</b>	<b>28</b>
	From Dialogue to Action	29

# *Introduction* **& Key Findings**

# Giving Patients a Voice



📅 Appointment Scheduled

As the US healthcare industry undergoes seismic shifts driven by **rapid technological advancements**, demographic trends, and a growing emphasis on **patient-centered care**, it's crucial to pause and understand **how** patients are reacting and adapting to these changes.

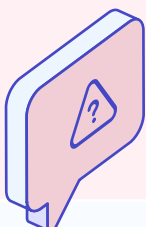
- **How** does patient behavior change when interacting with healthcare providers across different channels?
- **Which** support capabilities, or lack thereof, impact patient health outcomes?
- **What** spurs patients to engage more actively with their providers?

The purpose of this report is to shed light on real-world patient behaviors and preferences from the patient's very own perspective. By allowing patients to ***anonymously voice their experiences***, we aim to bridge the gap between what providers think their patients want and what patients report they truly need.

## 1,500+

**US patients** participated in our comprehensive survey, and this report examines the findings.

## Methodology



This survey was conducted in June 2024, targeting a sample of 1,561 patients in the United States. The respondents' ages ranged from 18 to 65 years and older. The gender distribution was 46% male and 54% female. Participants' annual household income varied from less than \$25,000 to over \$200,000.

The survey aimed to gather diverse perspectives across different demographic and geographic segments to reflect a broad cross-section of the population. Statistical analysis was applied to ensure the reliability and validity of the results.

# Key Findings

01

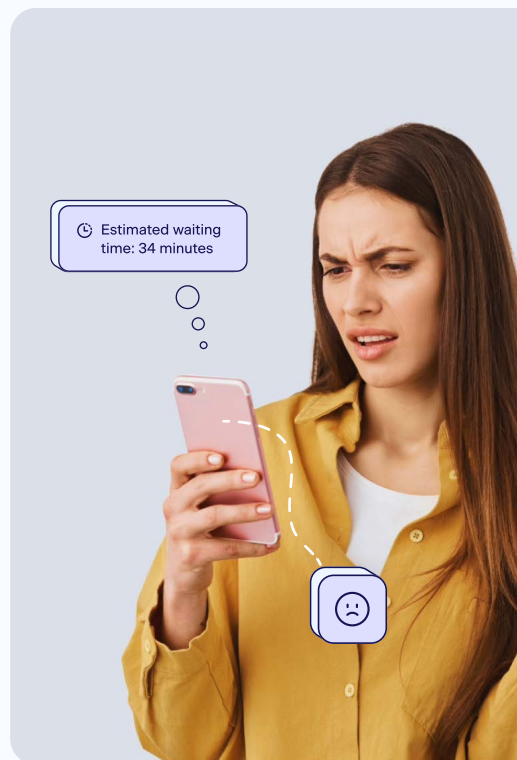
## *The Waiting Game:* The Hidden Cause of Rising No-Shows

**23%**

Of patients choose not to call to cancel their appointments, **fearing long hold times.**

Another 23% fail to cancel their appointments because there is **no online option available** to them.

This correlates with a steep **37% increase in no-show rates across US healthcare systems in 2023.**<sup>7</sup>



02

## *Refill Roadblocks:* A Silent Health Threat

**21%**

Of patients delay or forgo refilling prescriptions due to lengthy hold times and **cumbersome refill processes.**

**30%**

Of patients report **limited provider operating hours** that clash with their schedules as a barrier to refills.

**32%**

Of patients report that they have **experienced health complications or setbacks** in their condition as a consequence.



03

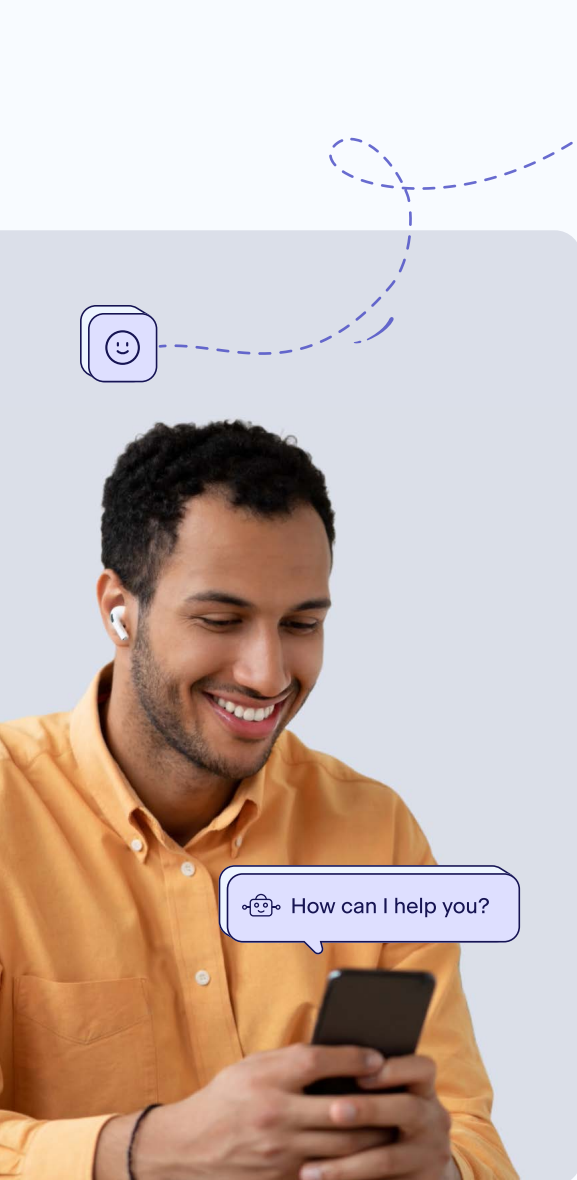
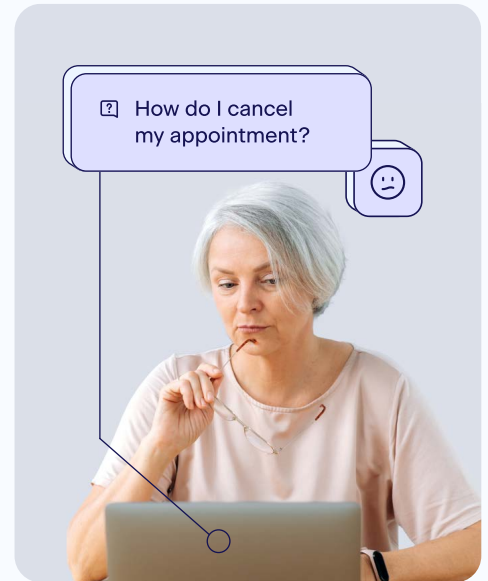
## Self-Service Revolution: Patients Seek Control

# 80%

Of patients believe there should be **more self-service options** for scheduling appointments.

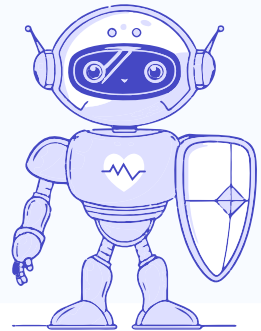
# 62%

Would **prefer to self-serve** rather than call to refill their prescriptions.



04

## Patients: Love the AI, Need Security Reassurance



# 66%

Of patients expect their healthcare provider to utilize **generative AI-powered technologies** to provide better patient support online and on the phone.

# 33%

Of patients cite **privacy and security** of personal health information (PHI) as their top concern regarding the use of generative AI in healthcare.

✦ CHAPTER 02

# *Beyond* the Bottom Line



# The *Ripple Effects* of Appointment Friction

## *The Waiting Game:* The Hidden Cause of Rising No-Shows

Our findings reveal that almost **half** of patients do not engage with their providers when it comes to confirming or making changes to their appointments.

☹ Please wait on hold.

Only **20%**

Of patients consistently contact their provider to verify or confirm the time/date of their appointment.

**23%**

Of patients choose not to call to cancel their appointments, **fearing long hold times.**

**23%**

Neglect to cancel their appointments **because there is no online option available to them.**



Reflecting the strides made by retail in boosting digital access, patients now expect the same level of convenience from their healthcare providers, demanding 24/7 omnichannel appointment management.

The absence of self-service options creates unnecessary friction, resulting in a **lack of engagement and communication** between patients and providers. This patient disengagement coincides with a **sharp 37%**<sup>7</sup> increase in no-show rates documented across US healthcare systems in 2023. **According to Artera**<sup>7</sup>, a missed appointment translates to an estimated cost of **\$265**, ultimately resulting in significant financial losses for providers.

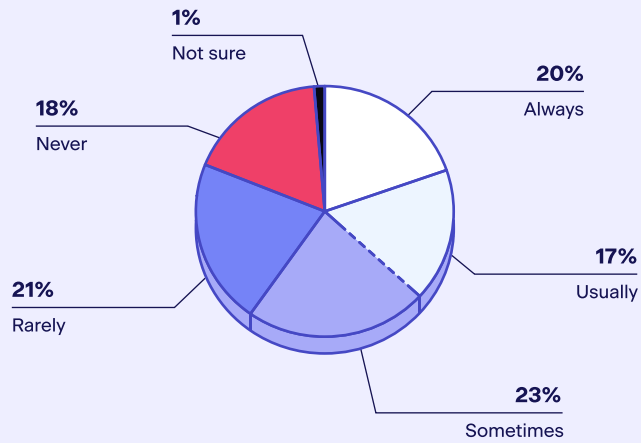






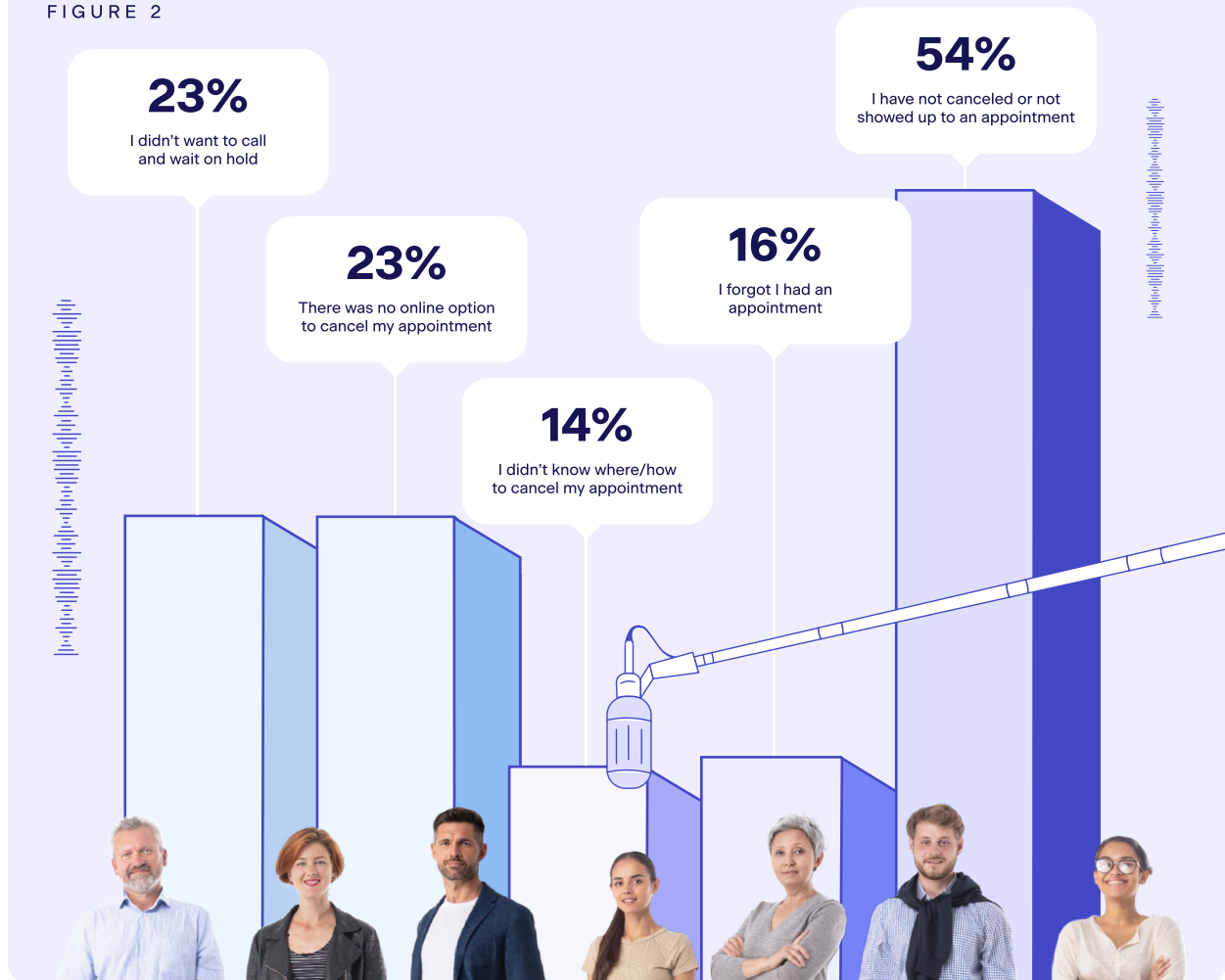
How often do you  
**call to verify** your  
upcoming  
appointments?

FIGURE 1



In the last 12 months, what caused you to **NOT notify your provider** that you needed to cancel an appointment?

FIGURE 2



\*Question allowed more than one answer, and as a result, percentages will add up to more than 100%

## A Language Barrier

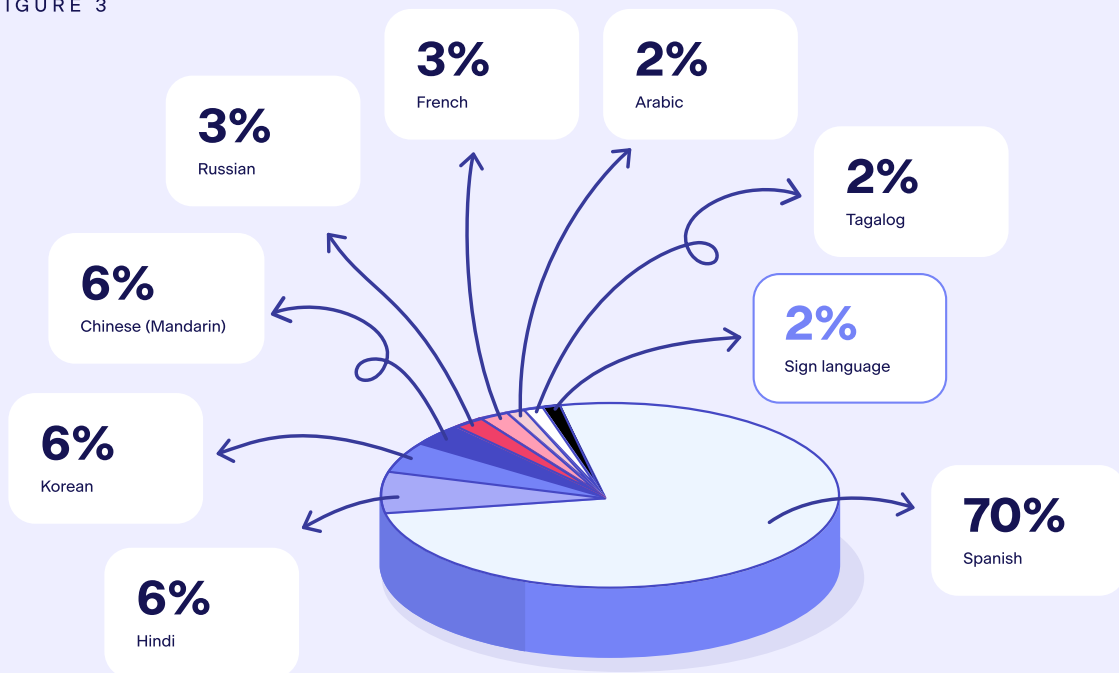


Another possible reason patients neglect to cancel their appointments is that appointment management services are not offered in their spoken language. **An analysis of 272,257 patient conversations with Hyro's Call Center AI Assistants** across a 30-day period provides a clear picture of the languages other than English that patients seek service in.

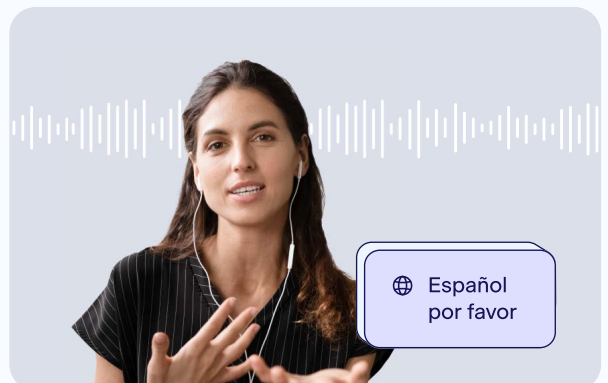
With nearly 22% of Americans speaking a language other than English at home, it's not surprising that **30% of patients requested a variety of spoken languages besides Spanish**, the second-most spoken language in the country, with 13.5% of the population speaking it.

### Languages requested (other than English)

FIGURE 3



Clear analytics on language demographics can play a crucial role in effectively allocating budget and resources. By understanding patient language preferences, healthcare organizations can prioritize staffing and technology investments, ensuring they meet the needs of their diverse populations. This targeted approach not only enhances patient care but also allows for agile adjustments in response to demographic shifts.



## Select, Book, Verify: Patients Want Easier Online Scheduling

75%

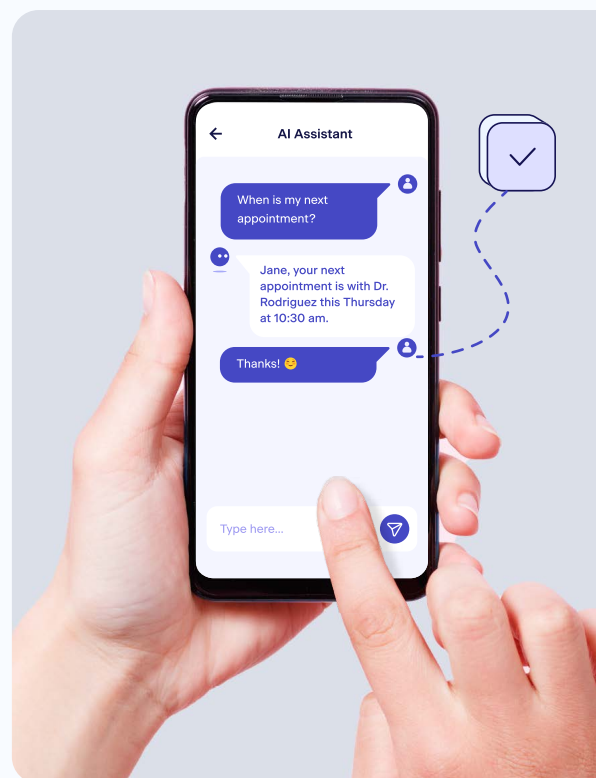
Of patients said they **would prefer to verify their appointments online** if they knew the option was available to them.

15%

Of patients indicated they already use online channels to verify their appointments.

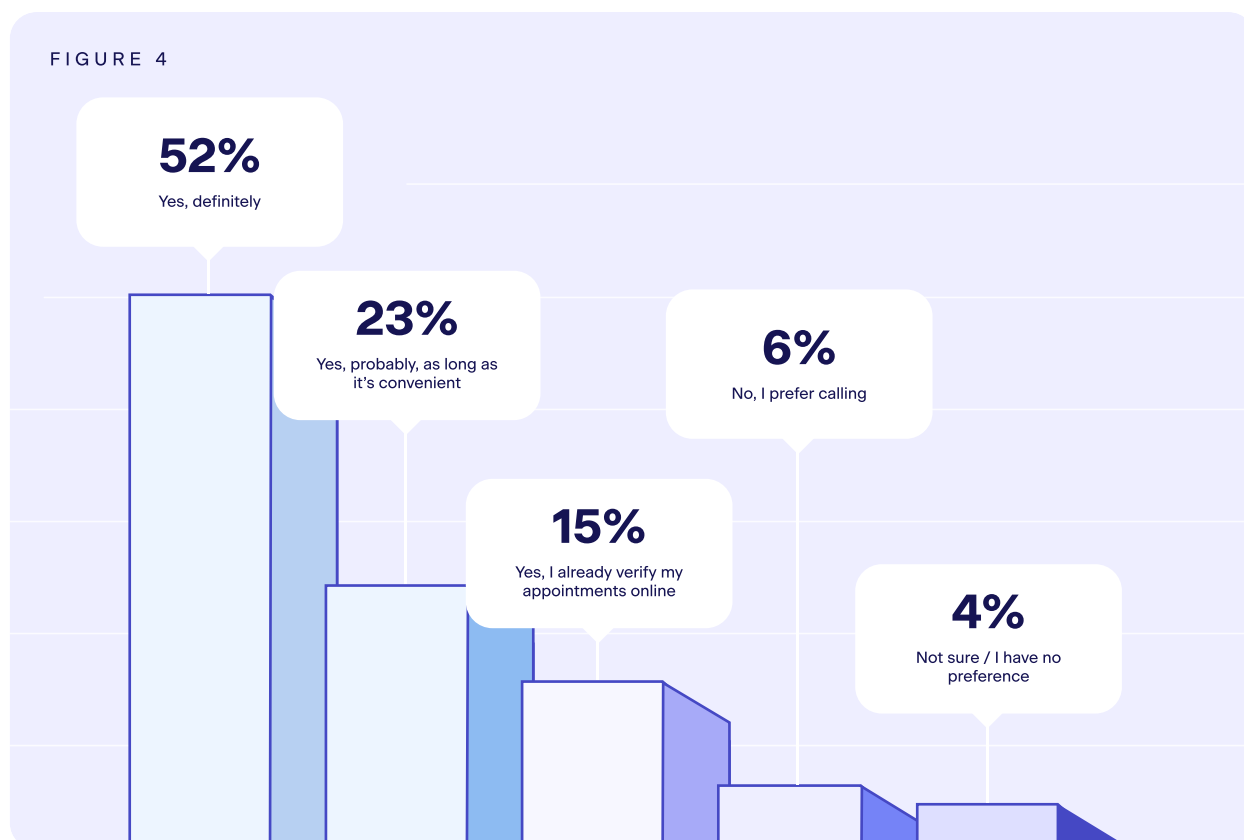
Only 6%

Stated they prefer verifying their appointments by contacting a representative over the phone.



Would you prefer to **verify appointments online** if you knew the option was available?

FIGURE 4





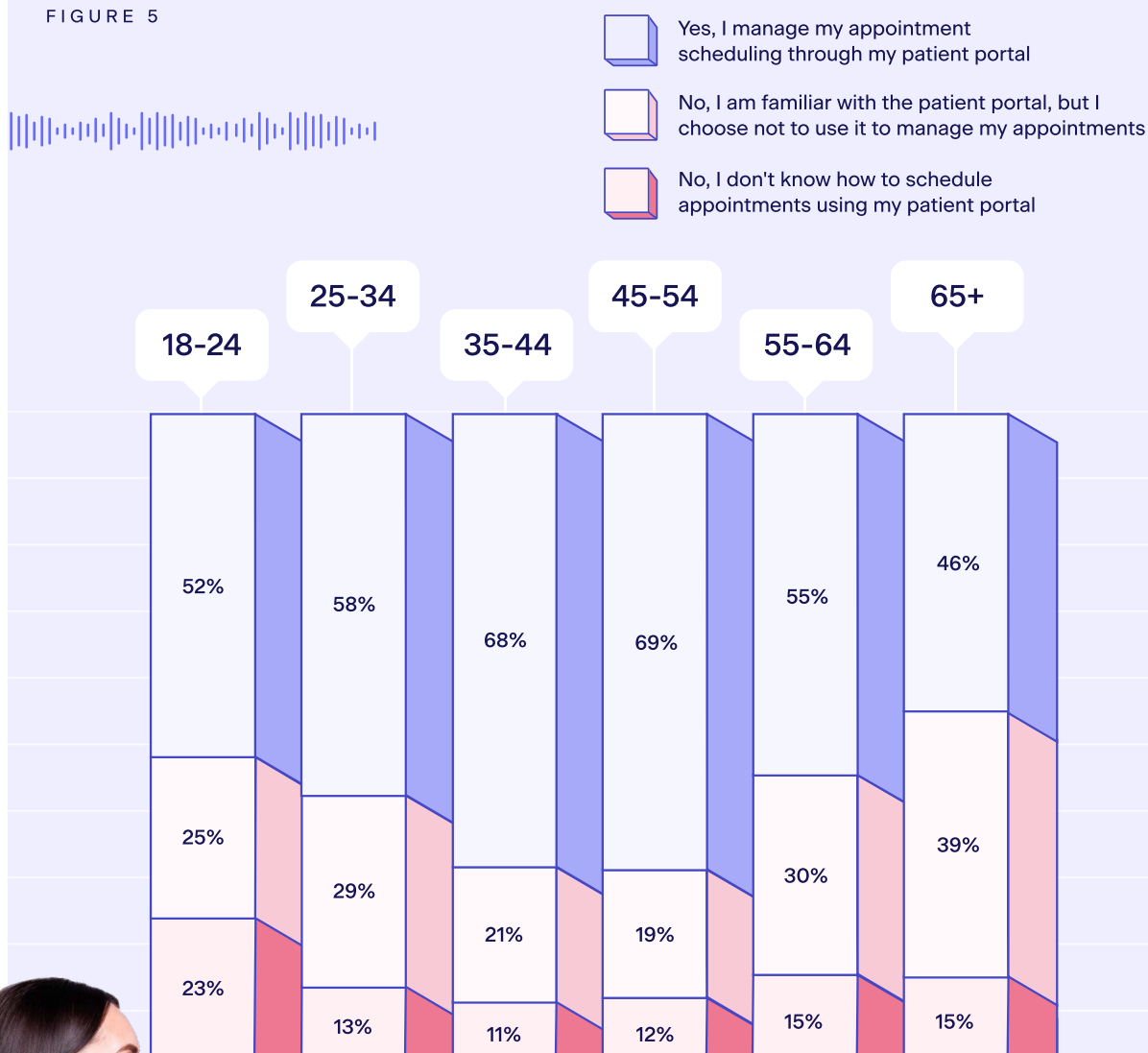
Among patients with access to a patient portal, **68%** of early Millennials (aged 35-44) and **69%** of Gen X patients (aged 45-54) reported **consistent use for scheduling** or managing appointments online. This usage rate drops by **23%** for Baby Boomers (aged 65+), with only **46% using the portal for appointment management**, and 39% explicitly choosing not to.

Tailoring solutions to the different generations that make up your patient population can significantly improve engagement. Providing patient portal options for Millennials alongside more conversationally-friendly online alternatives for Baby Boomers ensures all age groups can effectively interact with your healthcare services. This 'generational customization' enhances the user experience, ultimately leading to better patient engagement and satisfaction.



### Do you use your patient portal **to schedule or make changes** to your appointments?

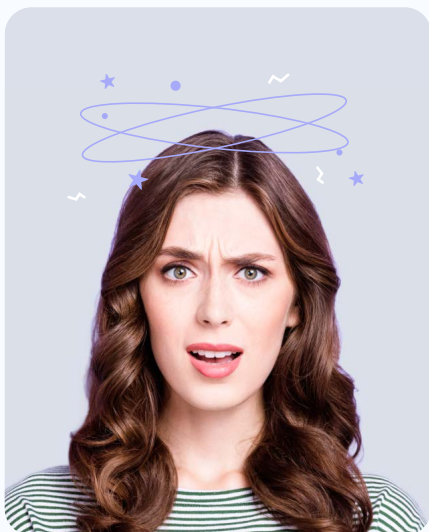
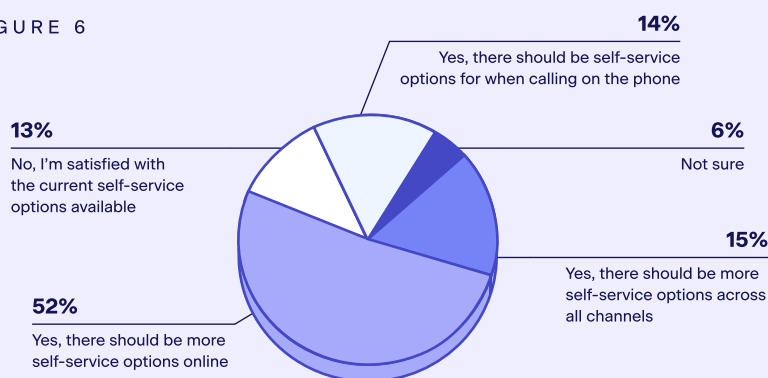
FIGURE 5





Do you believe there should be **more self-service options** for scheduling appointments?

FIGURE 6



Although patients were far from unanimous on their preference for their patient portal as the key channel to manage their appointments online, almost all (**81%**) agreed that there **should be more self-service options available to them**.

While the survey reveals a strong patient openness to digital tools for appointment management, a discrepancy between interest and actual use (as seen in Figure 5) suggests a potential navigation problem. Many patients may simply **be unaware of the available digital options**, or how to use them properly.

By making these features more discoverable and user-friendly, providers can encourage patients to adopt them, ultimately **empowering them** to take a more active role **in managing their prescriptions**.

## If You Build It, *They Will Come*

A healthcare provider with over 7,000 employees in the Midwest has implemented **Hyro's AI Call Center Assistants** to automate scheduling management.

The graph on the right illustrates the monthly usage breakdown of patients managing their appointments through Hyro's AI platform. Notably, 55% of patients calling in are able to seamlessly reschedule in self-service mode without having to wait on hold for an agent.

FIGURE 7

12%  
Appointment  
Cancellation

33%  
Appointment  
Verification

55%  
Appointment  
Rescheduling

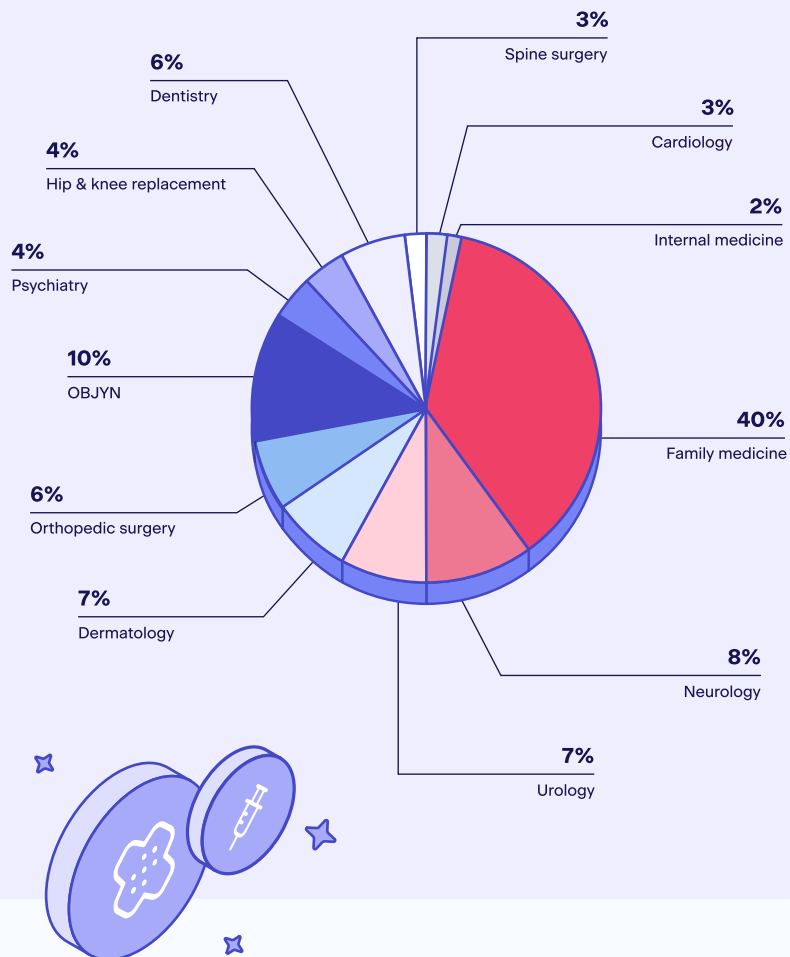
## High-Need, High-Demand: Specialties Patients Seek Most Often



**An analysis of 272,257 patient conversations** with Hyro's Call Center AI Assistants over a 30-day period reveals the most in-demand specialties and services. By understanding patient needs, health systems can optimize appointment scheduling, allocate resources for the most common appointment types, and potentially increase specialist availability in high-demand areas. This data-driven approach ensures patients receive the right care at the right time, improving overall healthcare access and experience.



FIGURE 19



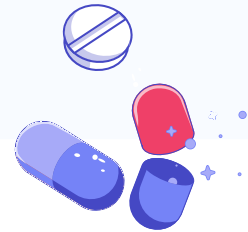
# Perscription

## *Pitfalls*





# Why Patients *Struggle* to Get Their Meds



## *Refill Roadblocks:* A Silent Health Threat

**21%**

Of patients **delay or forgo refilling prescriptions** due to lengthy hold times and cumbersome refill processes.

**30%**

Report limited provider operating **hours that clash with their schedules** as a barrier to refills.

**21%**

Of patients who do not currently have health insurance coverage, postpone their refills because they **cannot afford them**.

An analysis of 272,257 patient conversations with Hyro's Call Center AI Assistants over a 30-day period found that most calls occurred on weekdays, with Mondays seeing the highest volume following weekends.

However, Saturdays and Sundays still accounted for approximately 3% of calls (or 9,000 calls).

FIGURE 8



FIGURE 9



**23%**

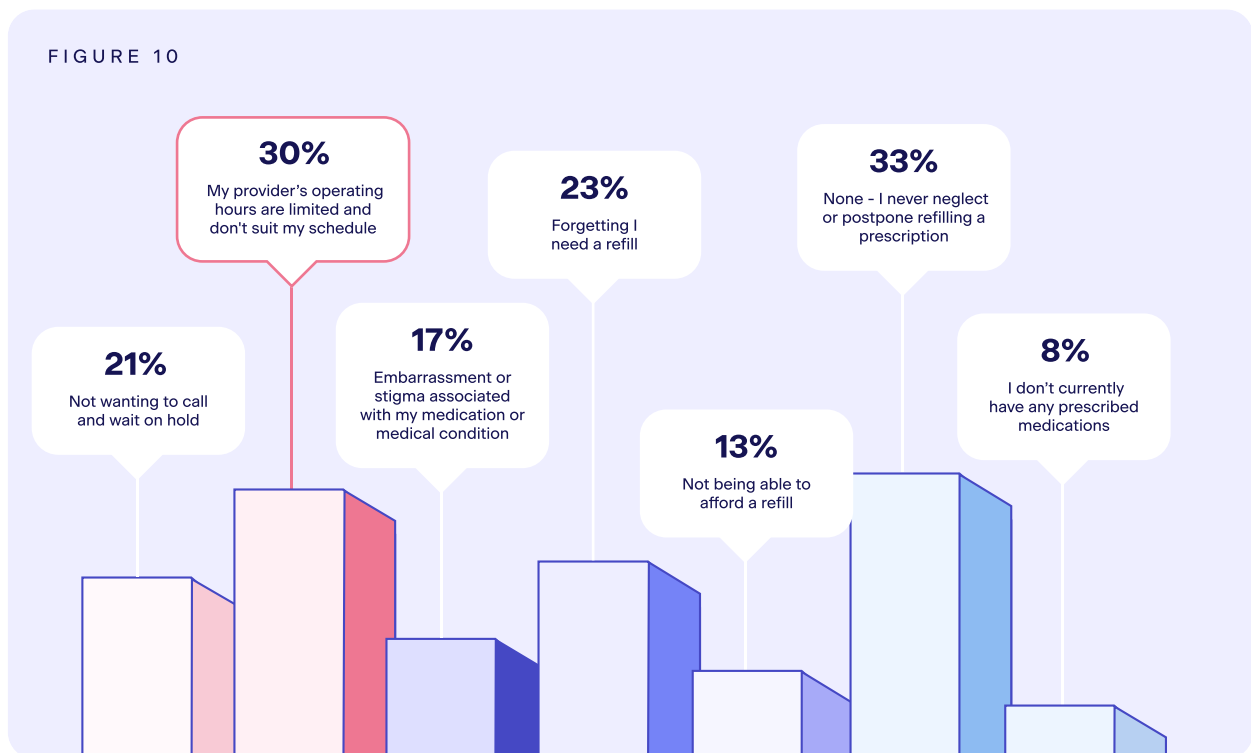
Of calls occurred during traditional off-hours, between 5 pm - 8 am (30-day period).

These figures reflect a gap in patient access to care. This can lead to frustration and anxiety, especially for patients with worsening symptoms or unanswered questions. Without proper after-hours support, patients might resort to expensive emergency room visits for non-critical issues, further burdening the healthcare system.



In the past 12 months, which of the following are reasons that have caused you to **postpone refilling a prescription**? (Select all that apply)

FIGURE 10

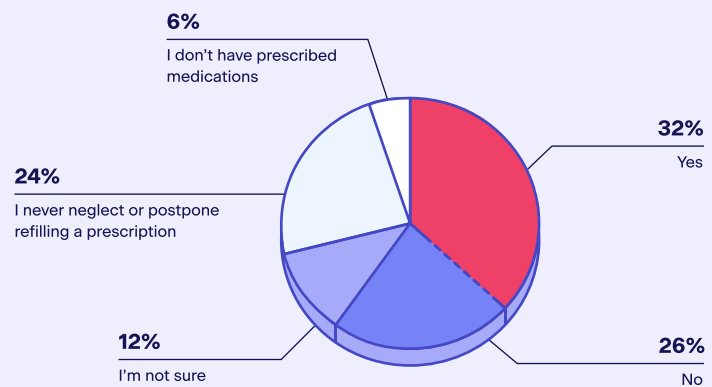


\*Question allowed more than one answer, and as a result, percentages will add up to more than 100%



Has **postponing your prescription refill** ever resulted in health complications or regressions in your condition?

FIGURE 11



⚠️ Reminder: Refill your prescription!



**32%**

Of patients report having **experienced health complications or setbacks** in their condition as a consequence of postponing their prescription refills.

Millennial and Gen X patients appear to be experiencing the most regressions in their health conditions due to postponing prescription refills. Among these age groups, 45% of patients aged 35-44 and 47% of patients aged 45-54 **reported health complications and setbacks** due to delaying medication refills.

The limited and rigid nature of existing Rx support flows appears to be hindering patients' ability to easily access their medications. This lack of accessibility can **negatively impact health outcomes**, potentially leading to higher costs associated with later-stage interventions. Studies have shown that **medication adherence is crucial** for managing chronic conditions, and inadequate support can lead to poorer health and increased healthcare utilization. In the US alone, total cost estimates for medication non-adherence range from **\$100 billion to \$300 billion<sup>7</sup>** annually, including both direct and indirect costs. Patient self-reporting indicates that lack of Rx adherence due to poor refill support is a significant contributing factor to these costs.

This is particularly concerning for Gen X as they age and face the dual challenge of managing their health while maintaining busy pre-retirement schedules. A **more flexible and supportive system is needed** to ensure patients receive the medications they need to stay healthy and avoid costlier medical procedures down the line.



Has postponing your prescription refill ever resulted in health complications or regressions in your condition **due to not taking medication as advised?**

18-24



25-34



35-44



45-54



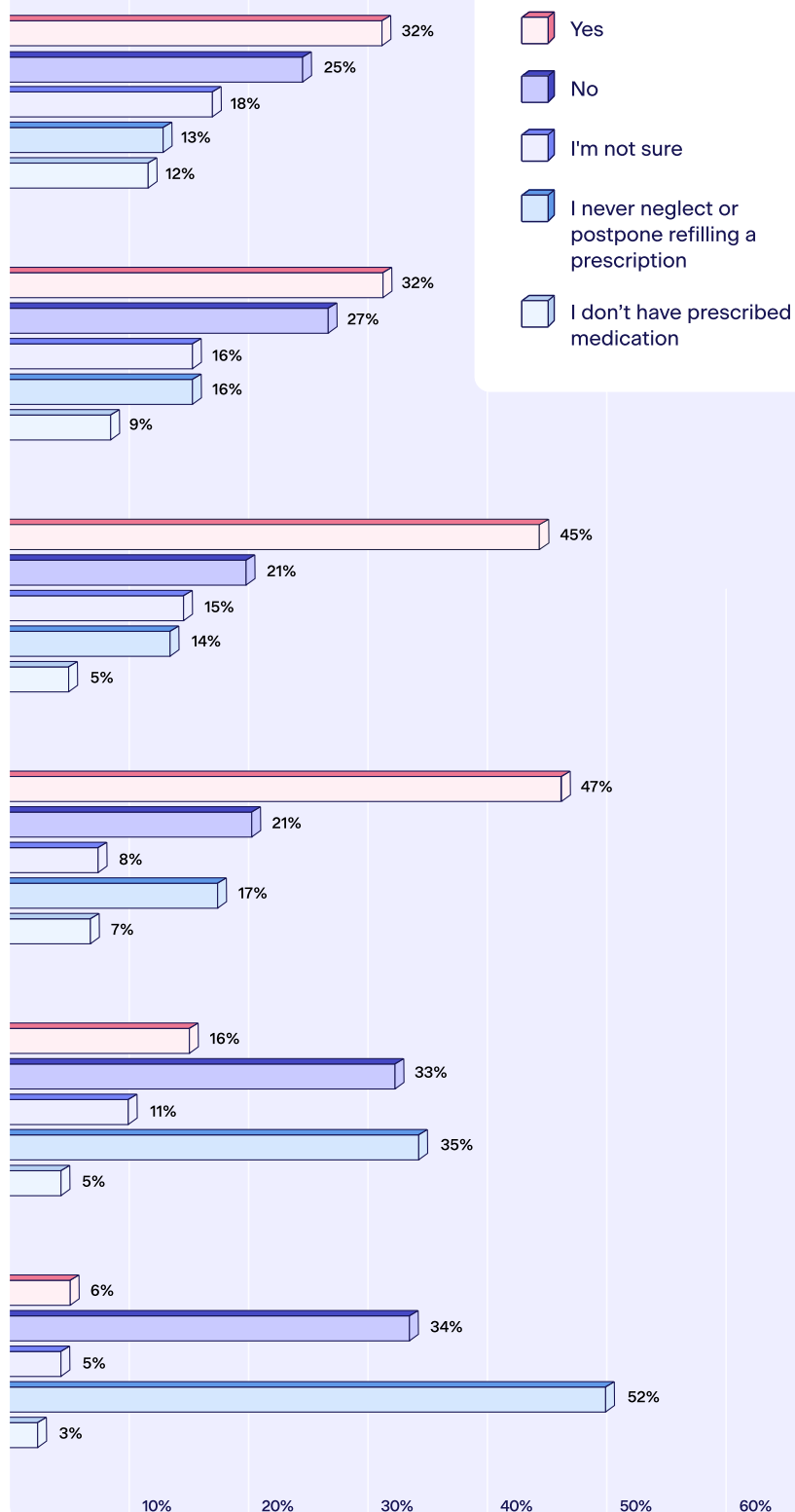
55-64



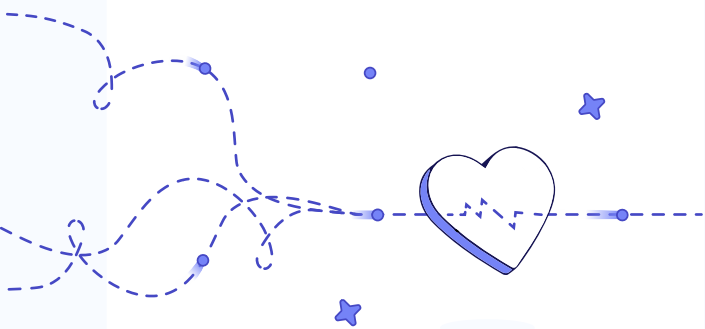
65+



FIGURE 12



## *Simplifying the Script:* Streamlining Prescription Management for Patients



Survey results reveal an opportunity to improve patient experience and optimize call center resources.

### 50%

Of patients reported calling to check their prescription status at least once from the time they made their request.

This translates to a substantial burden on call centers, often tied up with repetitive and easily automatable tasks.

### 16%

Of patients call to check on their prescription status **daily**.

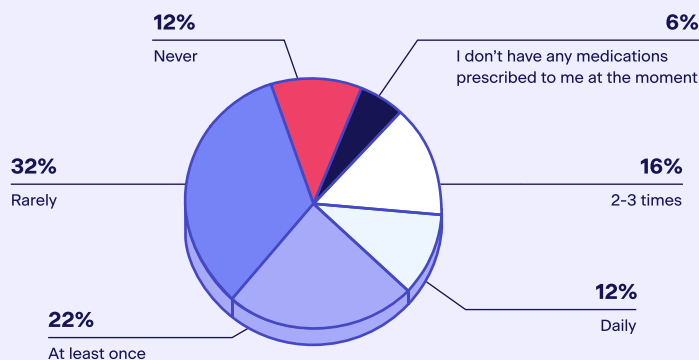
**16%** of patients call to check on their prescription status **2-3 times**.

There's simply no need for patients to waste time on the phone for something as simple as a prescription update. By **automating prescription status checks**, healthcare organizations can free up valuable call center resources and empower patients with real-time access to their medication information. This not only improves patient satisfaction by **eliminating unnecessary phone calls**, but also allows call center agents to focus on more complex inquiries and provide a higher quality service.



How frequently do you call your pharmacy or prescriber **to check on the status of your refill** from the time you order until the prescription is ready?

FIGURE 13





The survey revealed a gap between patient preference and their actual behavior. While **only** 25% of patients indicated a preference for contacting the call center for refills, our data (see Figure 13) shows that 50% still choose to call in.

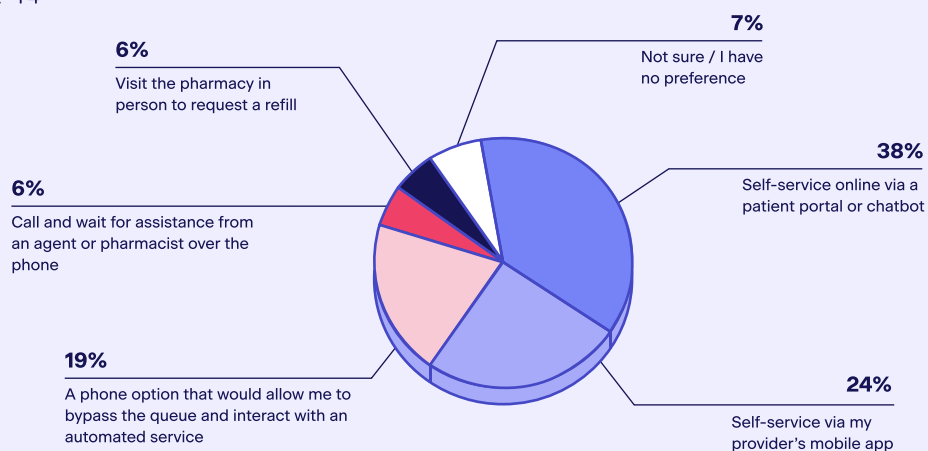
This suggests that current self-service or online refill options may not be meeting patient needs, prompting them to resort to phone calls. This discrepancy presents a clear opportunity to improve these alternative channels and deflect a substantial volume of calls (potentially 50% of all calls around refills).

Picture a scenario where a 500-agent call center receives 50,000 calls daily for refills. By effectively deflecting half (50%) to user-friendly digital self-service options, that call center could save 2,083 hours of agent time per day (assuming each call takes 5 minutes to handle) for a single use case. This cost-saving measure strengthens the case for healthcare organizations to invest in self-service solutions to optimize these channels.



Which of the following methods would you prefer to use for refilling a prescription?

FIGURE 14



✦ CHAPTER 04

# *AI* Revolution



# The *AI-Powered* Digital Front Door

## *No More Hold Music:* Patients Embrace AI for Faster Healthcare Access

🗣️ I'm an AI assistant.  
How can I help  
you today?



As per our survey findings, chatbots and AI voice assistants are becoming healthcare staples.

**81%**

Of patients have used chatbots and AI voice assistants in the past year for healthcare support.

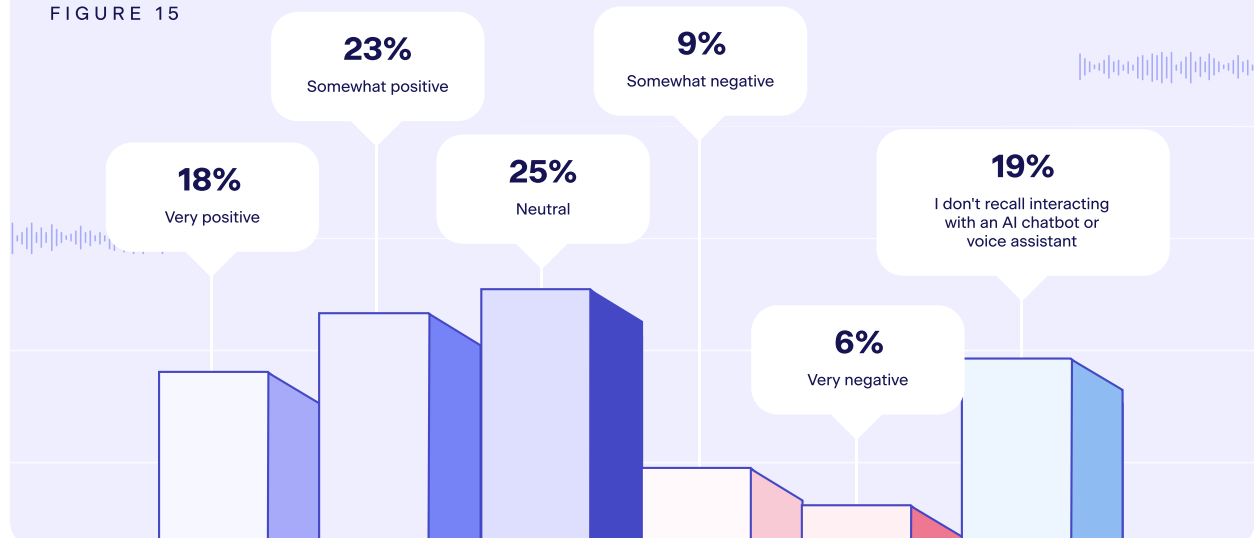
**41%**

Of survey respondents report having had a positive experience with AI.



How would you describe your experience with **AI chatbots** or **voice assistants** when seeking support from your healthcare provider in the last 12 months?

FIGURE 15



Not only is adoption of AI growing among patients, but there's also a developing preference for it. When given the option to either wait on hold or speak with an automated AI assistant to check the status of their prescriptions, patients voted AI.



**37%**

Of patients said they would choose to engage with an AI assistant immediately when calling their provider.

**84%**

Of patients report that if hold times are too long they would prefer to speak to an AI assistant.

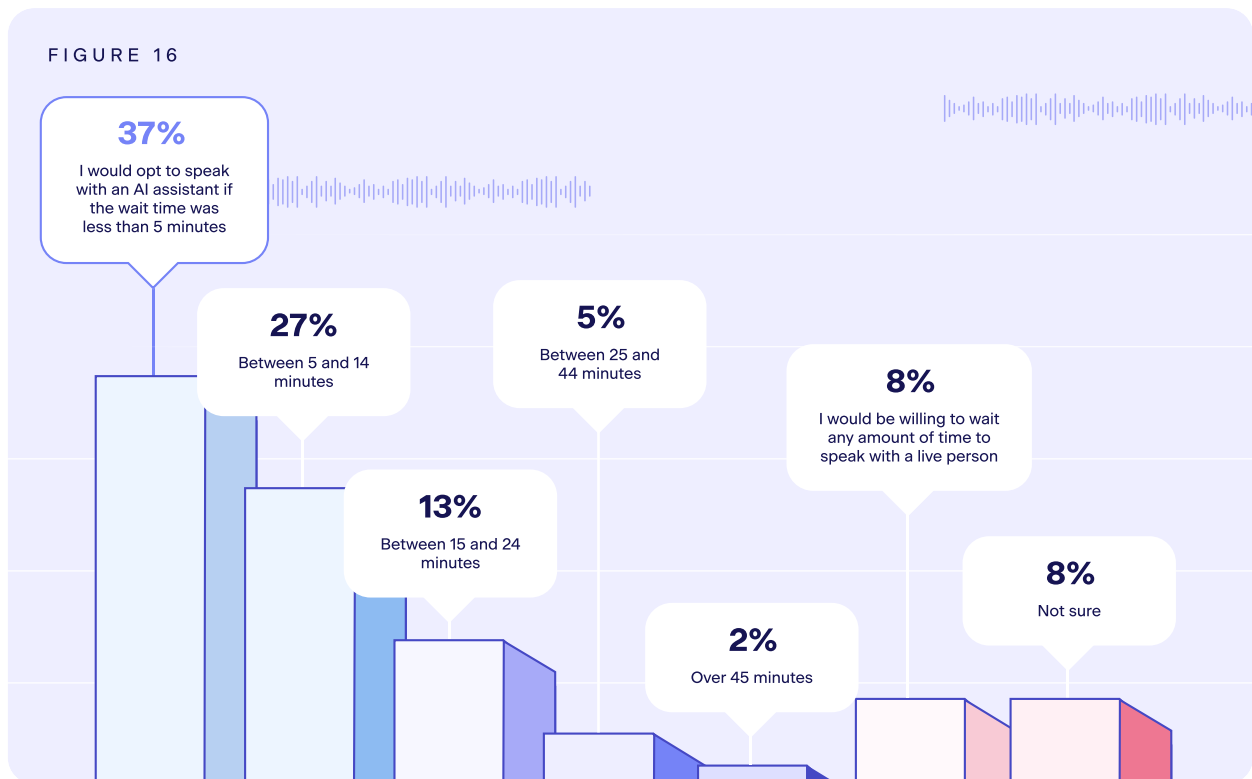
Only **8%**

Of patients said they would be willing to wait any amount of time to speak with a live person.



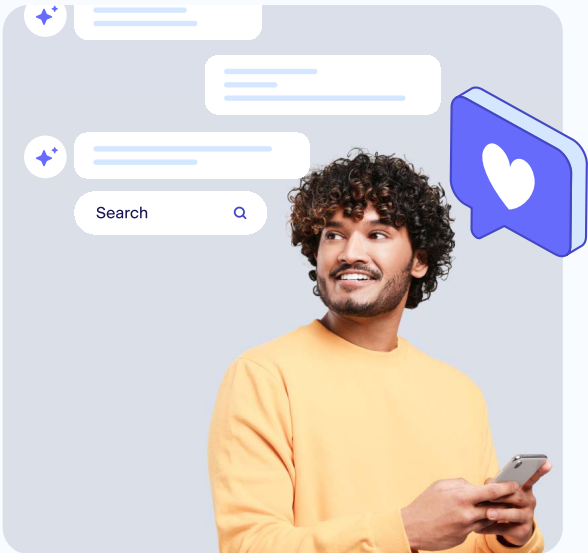
If calling about a prescription refill and experiencing a hold time, **at what point would you opt-in to speak to an AI assistant instead of waiting on hold?**

FIGURE 16



Patients: Love the AI, but Need Reassurance

Patients are embracing AI for tasks typically handled by humans, such as answering general inquiries about operating hours, clinic locations, or arrival instructions. Our survey revealed **strong patient trust in AI for these tasks.**



37%

Of patients are open to using AI for appointment management, including scheduling, rescheduling, and cancellations.

38%

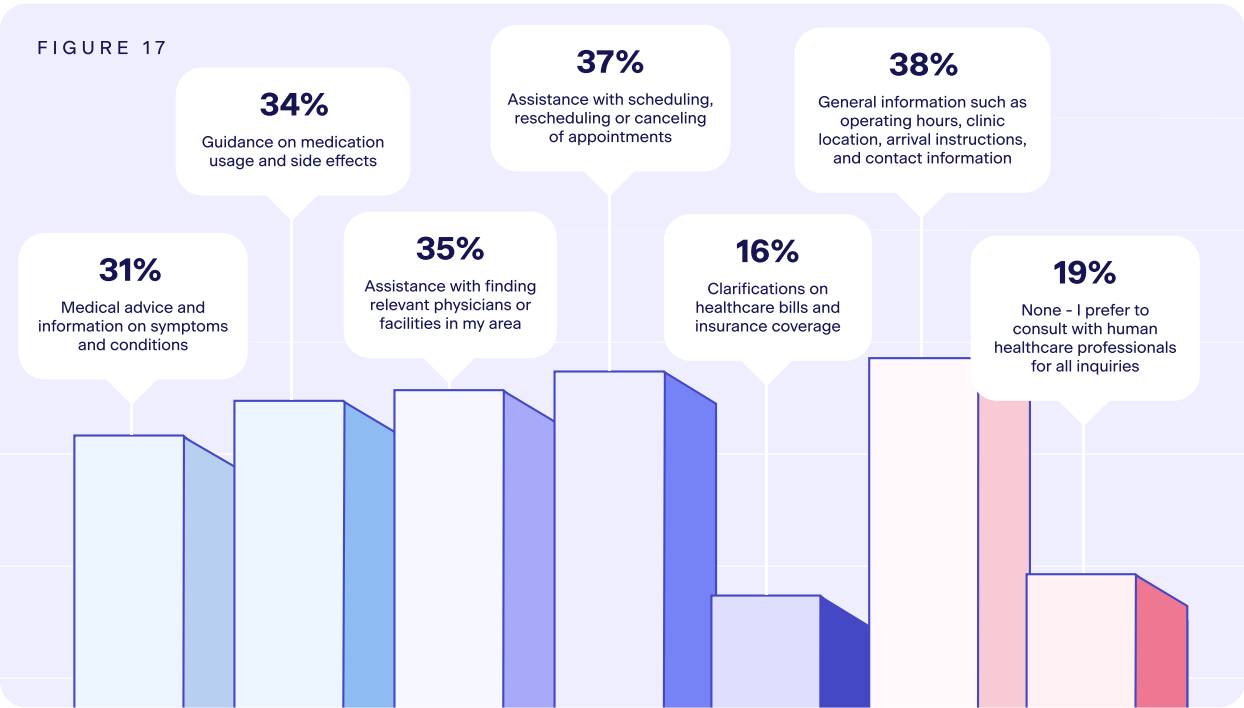
Indicated confidence in receiving accurate information from AI.

35%

Expressed interest in leveraging AI to find providers or facilities within their area.



What types of questions would you **feel comfortable asking an AI assistant** and trust it to answer correctly? (Select all that apply)



\*Question allowed more than one answer, and as a result, percentages will add up to more than 100%

Our analysis of real-world data from a major Midwest health system reinforces patient's trust in AI. We analyzed the most frequently requested services handled by Hyro's Call Center AI Assistants to understand which tasks patients prefer to handle through AI.



**38%**

Of patients use Hyro's Call Center AI Assistants to schedule their appointments.

**29%**

Leverage them to address general and medical inquiries.

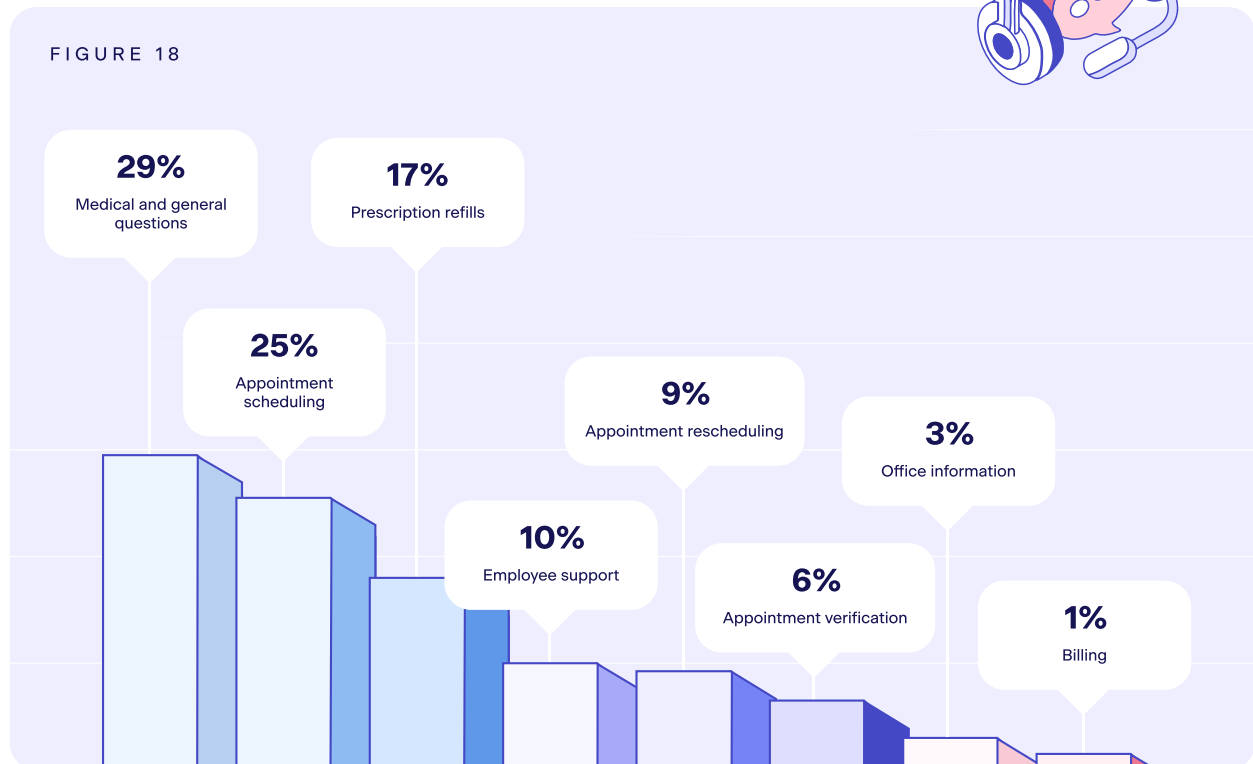
**17%**

Employ them for prescription refills.

## Distribution of AI-automated calls by requested services



FIGURE 18



66%

Of surveyed patients expect their healthcare providers to adopt generative AI for better online and phone support **this year**.

33%

Expressed some reservations about interacting with AI for healthcare.

34%

Of Baby Boomers (aged 65+) favor human interaction.

There's a sweet spot where generative AI benefits both healthcare providers and the patients they serve. Automating tasks such as appointment scheduling and FAQs can be considered "low-hanging fruit" - easy and clear wins that yield meaningful results. This approach streamlines operations, leading to **cost savings that can be reinvested in personalized patient care**. Furthermore, fulfilling patient desires for a more efficient experience fosters trust and buy-in for AI. This creates a virtuous cycle that can lead to even more use cases being fully automated by this technology.

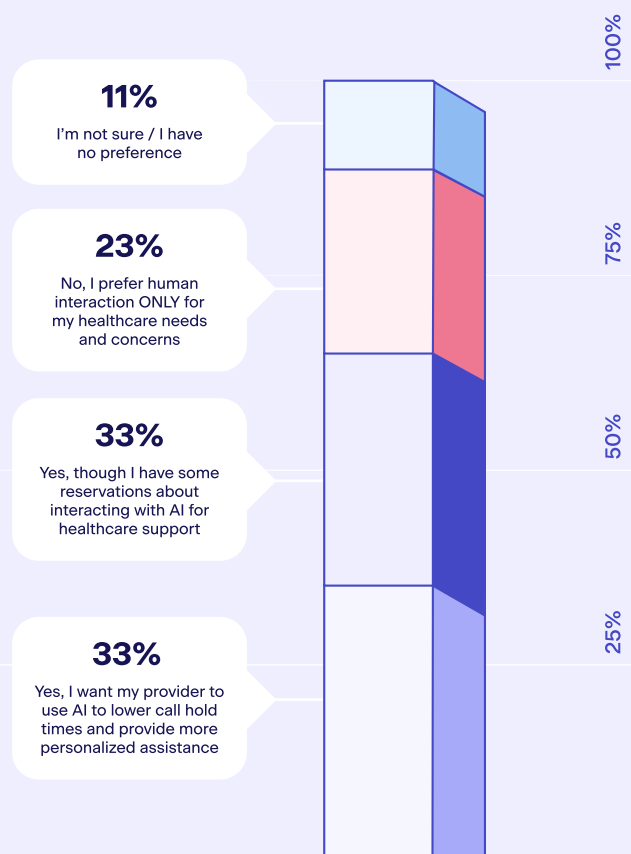
Leveraging automation for repetitive tasks alongside human-centered care is key. By automating routine processes, we can free up human agents to provide personalized attention to patients who need it most. This combined approach ensures that patients receive both the efficiency of automation and the irreplaceable value of human care.



Given recent advances in AI technology (e.g. generative AI applications such as ChatGPT), do you expect your healthcare provider to utilize this technology to **provide better patient support online and on the phone?**



FIGURE 20



Diving deeper into patient concerns regarding the use of AI in healthcare support, a range of answers surfaced. These answers brought into sharp relief that **gaining patient trust in AI must be done from day one**, with extensive due diligence performed and ample, readily available education on how patient data is being protected.

# 33%

Of surveyed patients identified the privacy and security of their personal health information (PHI) as their top concern about the use of gen AI in healthcare.

# 31%

Expressed skepticism about the accuracy and reliability of AI-generated responses.

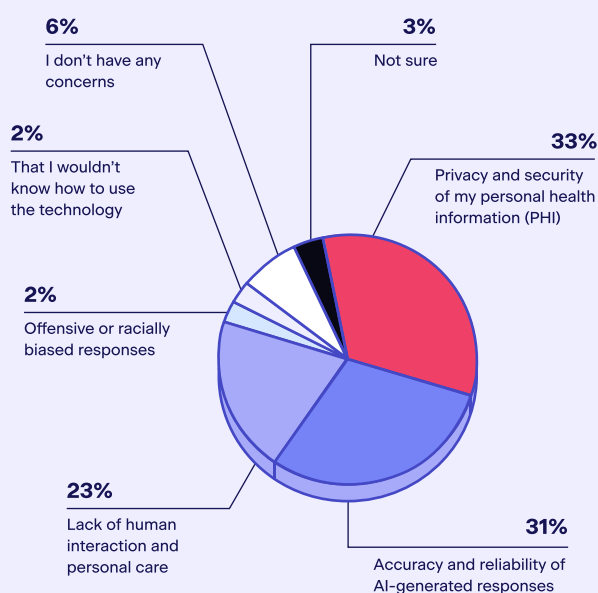
# 23%

Voiced concerns about the more intangible aspects of AI, fearing a lack of human interaction and personalized care.

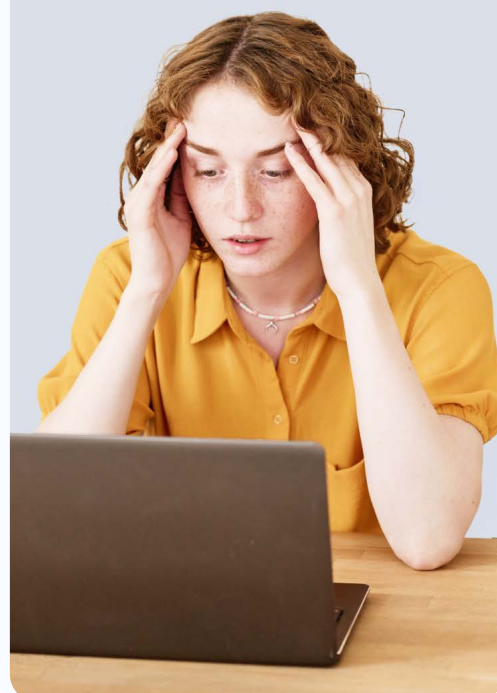


What is your **top concern** regarding the use of AI technology as part of healthcare support?

FIGURE 21



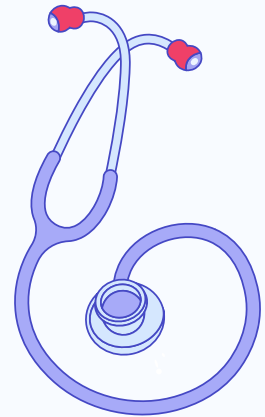
Is my health information safe?



# Conclusion



# From *Dialogue* to *Action*



## Closing the Gap Between Patient Needs and Healthcare Delivery

By carefully listening to patient voices as expressed through our survey findings, **three key points emerge.**

### A Desired vs. Delivered

Current systems for assisting patients with everyday healthcare needs, such as appointment and prescription management, fall short of expectations and are not attuned to patient behavior. Our findings suggest the healthcare industry is still trying to catch up with patient expectations for seamless, Amazon-like service experiences. Patients, it seems, overwhelmingly prefer self-service capabilities across various channels to resolve their issues, rather than waiting to speak with an agent.

### B The Consequences of Friction

Patient digital friction often gets framed as an experience, engagement, and satisfaction issue. However, our survey revealed a more concerning consequence: friction can directly impact patient health outcomes. Addressing this challenge should be a system-wide effort, not solely the responsibility of patient engagement and access teams.

### C Patients Are Ready for Responsible AI

The key to balancing patient demand for AI-powered communication and trust lies in Responsible AI – a framework that emphasizes explainability, controllability, and compliance, as well as educating the patient population on the safeguards in place to protect their privacy and ensure reliable AI-powered support.



Hyro, the leading Responsible AI-Powered Communications Platform for healthcare, enables health systems to **safely automate workflows and conversations** across their most valuable platforms, services, and channels—including call centers, websites, SMS, mobile apps, and more.

Hyro's clients, which include **Intermountain Health, Baptist Health, and Hackensack Meridian Health**, benefit from AI assistants that are fully HIPAA-compliant, fast to deploy, easy to maintain, and simple to scale—generating better conversations, successful patient outcomes, and revenue-driving insights.

To learn more, visit [hyro.ai](https://hyro.ai)

