



BRIGHT.MD

How modern health systems can stay competitive in today's consumer-led, tech-first environment

The Bright.md guide to today's healthcare consumer preferences

Healthcare has a history of forced evolutions of sorts...

Think back to 2009 when the U.S. government enacted Meaningful Use as part of its Health Information Technology for Economic and Clinical Health (HITECH) Act, which phased practitioners into using electronic health records versus traditional paper charts.

But unlike a decade ago, today's health systems aren't facing set government requirements they need to fulfill, but are instead grappling with a cultural shift that some could argue is a make-or-break period for care delivery as a whole. Patients—now considered 'consumers' of their care—desire digital options, quick turnaround times, and a more convenient approach to their healthcare needs. As a result, health systems are now on the defensive, as big name brands make a play for low-acuity patients, essentially poaching potential downstream revenue.

With the onslaught of more convenience care options—combined with changes in consumer behavior as a result of the pandemic—is health system loyalty no longer? Or are there strategic ways today's systems can remain relevant and competitive, despite this massive shift in consumer preferences?

In this guide, we tackle all of today's current trends when it comes to consumer preferences in their healthcare and what this means for health systems.

You'll learn about:

- Key consumer preference trends accelerating the rise of direct-to-consumer (D2C) healthcare options
- Trend analysis and takeaways that every healthcare executive should know
- Top areas of focus that are critical to your technology decision-making process
- How—exactly—asynchronous telehealth directly addresses today's top healthcare considerations, all while driving value and retention for health systems

Competition for care in a peri-Covid landscape

TikTok, UberEats, Amazon—today's consumer apps and solutions lean heavily into shortened attention spans and deliver on the utmost convenience. It's no wonder consumers are choosing direct-to-consumer care options to address their low-acuity concerns in record fashion, often instead of their local health system.

In fact, more than half of today's consumers say they're interested in exploring these types of convenience care options, **according to a recent consumer survey** commissioned by Bright.md. Forty-eight of respondents said they've tried to access care online, through an app, or through a local clinic since March 2020, rather than through their health system.

And it's Millennials and Generation Xers that are the most prone to leaving health systems for these more convenient modes of care—nearly three quarters of older Millennials and younger Gen Xers said they'd first try to get care for minor conditions through an app or online option before contacting their health system provider. Additionally, 64 percent of all respondents who sought care for common conditions said in the future, they'll likely turn toward apps or local clinics for similar treatments, instead of their health system.

“The reality is, many **direct-to-consumer options don't want our complex, multi-problem patients—they want the low-hanging fruit. And what I often tell other healthcare executives is that you have to be careful with letting these competitors have that low-hanging fruit.**”

— Dr. Brett Oliver,
CMIO at Baptist Health

What health systems can learn from the D2C healthcare experience

Today's patient-consumers have a plethora of options at their fingertips, but the ones thriving in today's environment bank on ease-of-use and quick turnaround times. Everything from a mobile pickup order to vacation booking and more is done on a cellular device, leaving little room for unnecessary steps or clunky interfaces. With the swipe of a finger or a tap of a button, consumers can fulfill many—if not all—of their day-to-day needs, without leaving their couch. And as a result, D2C options filling that void in the healthcare space have now become competitive in their quest for low-acuity patients.

However, health system executives looking to play ball can learn a thing or two from the direct-to-consumer healthcare experience—and with the right technology, can turn the tide from the loss of patients to attracting and retaining them in their organization.



Here are three observations leaders can glean from today's top D2C competitors

1. Consumers are switching to D2C and walk-in clinic options because the experience is faster and easier.

- Only 12 percent of consumers thought their health system offered a faster, easier, and more user-friendly experience than accessing convenience care
- 54 percent thought the D2C and walk-in clinic options were better, and 32 percent thought they were about the same
- Only six percent of those respondents who do not have chronic conditions found their health system experience to be easier, faster, and more convenient

Takeaway: There is a significant opportunity for health systems to improve primary and urgent care experiences to keep the “walking well” coming back to the health system—to ensure continuity of care, drive patient loyalty, and capture downstream revenue.

2. Long wait-times remain a major barrier to patient satisfaction and loyalty.

- Consumers are frustrated and impatient with having to sit in a waiting room or wait days or weeks before seeing a provider or specialist
- 69 percent of patients who tried to book an appointment with their health system needed to wait one day or longer to see a provider or specialist
- 31 percent of patients said they were able to receive same-day care through their health system

Takeaway: Patients want convenient care that doesn't require booking an appointment weeks in advance. When they're looking for treatment for common low-acuity conditions, they expect same-day care.

3. Consumers are also putting off care for reasons other than cost.

- 54 percent of consumers have put off getting care for non-financial reasons this year
- 10 percent have put off care because they can't find a doctor they trust
- 13 percent don't know how to get the care they need
- 15 percent want more convenience

Takeaway: This presents opportunities for health systems to re-engage patients to establish trust before their deferred conditions become more complex and costly to treat.



In a nutshell: 4 key consumer trends every healthcare executive should

1.

Convenience is at the root of the patient experience.

Wait times, travel, repetitive questions, and feeling rushed are all consumer “pet peeves” and greatly impact how today’s patients opt to find care.

2.

Uncertainty around where to go and what kind of care is appropriate is overwhelming.

With the full blown “consumerization” of care comes a plethora of options, leaving some consumers confused and overwhelmed.

3.

The digital entryway to care is now make-or-break.

Today’s staffing shortages and increasing patient expectations are making a patient’s “digital front door” experience critical to success. In fact, a patient’s pre-visit experience ranked high on importance when it comes to their digital care experience, according to a recent study.

4.

Trust in a provider is critical to longevity.

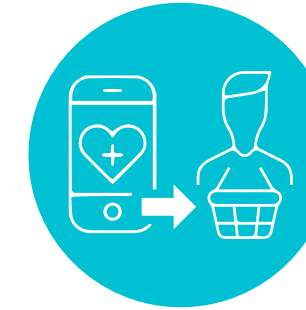
When patients have a rushed or negative experience with a provider, the system consequently loses trust, loyalty, and business. And, chances are, the care delivery experience left much to be desired by your providers as well.

Overall, patients want more control over their healthcare experience, and they want that to happen digitally whenever possible, without sacrificing quality. Cost transparency, less repetitive intake processes, and more virtual care options are what consumers desire most out of their healthcare in today’s environment.

What now? Health system strategies for developing a competitive, hybrid care model

We drilled down into four actionable steps healthcare executives should take to drive patient loyalty and uptake, despite increasing competition.

1. Consider solutions that are on-demand, virtual, and easy to use.



Forty percent of consumers say they want more digital options that allow them to interact with a provider, share their symptoms, and get a diagnosis and treatment plan virtually. Bright.md's virtual care solution uses digital access points to help patients find, access, and receive care, while clinicians can treat patients from the platform asynchronously or triage them to the right level of care, whether that be video or in-person. Additionally, it enables your existing tech stack to work more productively for each patient encounter—asynchronously, in-person, or via video.

2. Streamline the intake process to improve healthcare for both patients and providers.

One in three consumers said they want their health system to reduce the amount of repetitive questions regarding their symptoms during intake. In a separate question, nearly half (47 percent) said they were asked to provide their background information and symptoms to healthcare professionals multiple times during each visit. Bright.md's clinical interviews, though, help gather the necessary medical history while automating patient intake, resulting in a more streamlined experience for both the patient and the provider.



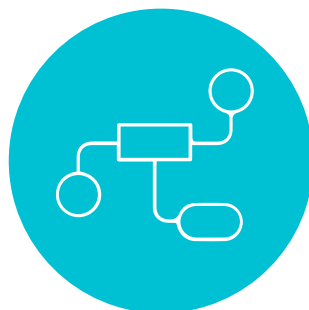
3. Make it easy for patients to find the care they need while directing them appropriately through a digital front door.



By implementing a triage solution like Navigate by Bright.md, health systems can compete directly with direct-to-consumer offerings by meeting patients where they are. Designed to have a seamless, on-demand experience, Navigate makes finding care as easy as possible for patients. In fact, those who use Navigate to find care for low-acuity conditions like ear infections, colds, or rashes can immediately begin an asynchronous interview through Bright.md with a wait-time of just eight minutes on average to get a diagnosis and care plan from a trusted provider.

4. Equip providers with the right kind of technology that integrates into your tech stack and provides value.

Today's clinicians are facing an epidemic of burnout, which includes a low sense of professional worth. To negate turnover and alleviate clinician overwhelm, a solution like Bright.md makes sense—the clinical interviews within our asynchronous telehealth platform is proprietary and allows providers to treat low-acuity conditions in an average of two minutes per patient. These numbers have huge implications for improving patient satisfaction, increasing patient retention, improving access to care, reducing provider burnout, and driving cost savings for the health system.



“**[Bright.md] is incredibly helpful. Instead of having to drive and then wait an hour at urgent care to see a doctor, I could quickly get diagnosed and a prescription from home. It saved me time, allowed me to not take time from work and prevented me from putting my infant at risk by going to an urgent care center where there may be germs. Thank you for this service!**”

— Bright.md patient user on convenience and ease-of-use of asynchronous care



Why Bright.md? How our asynchronous telehealth solution directly addresses today's top care delivery requirements to stay competitive

Health system executives not only have the lofty task of attracting and retaining patients in today's new environment—they also have to navigate through a plethora of solutions claiming to help. Bright.md's asynchronous telehealth platform, though, was designed specifically to address the key areas of focus today's health systems need to develop, in order to compete.

Priority 1: Personalization and convenience

Today's tech-savvy end user wants a care delivery experience centered on convenience and ease-of-use. Expectations around personalization have also increased. Bright.md's virtual care platform uses digital access points to help patients find, access, and receive care seamlessly—on average, it takes 13 minutes for a patient to complete a Bright.md interview, while their average wait time to receive a diagnosis and treatment plan is about eight minutes. Additionally, 97 percent of patients who've received care through Bright.md were satisfied with their experience, while 83 percent of patients who've used our solution say they would use it again.

We've created our clinical interviews, for instance, to mimic a traditional in-person intake conversation between a patient and a provider; as a result, our interviews are less "stock-like" and instead deliver on the personalization that patients crave.

Priority 2: Care access and ensured equity

Today's patients also want their care readily and easily, from wherever they are. We've designed the Bright.md platform to address some of the key barriers to patient access, including transportation, language, tech, literacy, wait times, inclusivity, and costs. People in rural areas or who live far from a provider or urgent care center have an easy, on-demand option to start their care, creating value for your organization in the long run. The Bright.md platform also doesn't require a broadband connection.

Additionally, according to one study conducted by the Annals of Internal Medicine, it costs about \$150 to be treated for three of the most common illnesses in an urgent care setting—a sore throat, urinary tract infection, or ear infection. For patients, Bright.md customers charge between \$0 and \$40 per visit. Patients receive care for these and other complaints without an expensive trip to the ER, while health systems gain significant cost savings.

Priority 3: Clinical capacity expansion

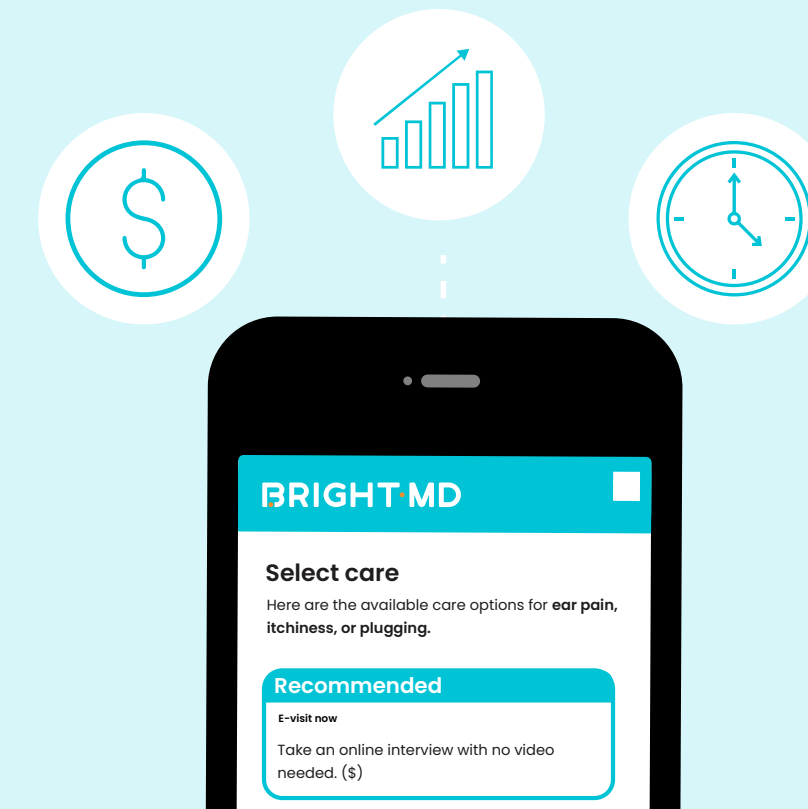
How can health systems deliver on patient expectations at the same time today's doctors are experiencing unprecedented levels of burnout? With Bright.md, we also know how important it is to automate the parts of healthcare that keep clinicians away from patients who need them most. That's why we actively increase the capacity of your existing clinical teams by empowering them with tools that integrate with your EHR, essentially eliminating administrative work. We do this by automating chart notes, after-visit summaries, treatment plans, prescriptions, and more, along with clinical intake and pre-visit interviews. As a result, providers can treat hundreds of low-acuity conditions in two minutes on average, from anywhere.

“[The provider time to deliver care with Bright.md] is significantly less than what we've seen with other virtual care platforms, and such a drastic reduction in time our providers are spending on things like ear infections or UTIs. Meaning, they can spend more time with patients who need that face-to-face care. It also means providers don't have to spend as much time in Epic because Bright.md automates much of the documentation, billing and prescribing, and it's integrated into their existing workflows.”

— Dr. Brett Oliver, CMIO at Baptist Health

Priority 4: Net new and downstream revenue, plus care delivery savings

When done right, asynchronous telehealth ultimately drives patient volumes, retention, and savings. Our health system partners recognize net new revenue through the expansion of their clinical care teams with Bright.md—they've added capacity by preventing leakage to other systems, offering a convenient option to rural populations, and more. Downstream revenue is also realized, with one of our partners seeing 13 percent of patients who completed a Bright.md visit as net new to their health system. Lastly, we're able to generate cost savings through care efficiency for value-based populations in particular; 25 percent of our asynchronous visits are completed by patients in a value-based population, replacing other high-cost care options for this demographic.



“Bright.md is a great product, and in many regards, perhaps even ahead of its time. When we first launched, insurances were not consistently covering asynchronous care. Fast forward to the onset of the pandemic, we were positioned really well to offer consumers a resource that didn’t involve coming to the clinic for care. I really haven’t seen a comparable product in the marketplace to what Bright.md offers. Offering basic acute care asynchronously [versus synchronously] provides a fast, convenient, effective, and cost-effective experience for patients.”

— Jessica Remington, Associate VP of Business Development at Winona Health

BRIGHT•MD

The leading asynchronous telehealth solution
loved by patients, trusted by providers

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