



Independent Physician Survey: The Referral Destination Hospital

5-Star Care for Patients and Increased Revenue for Hospitals

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Executive Summary

SCI Solutions pulled research from the Reaction (formerly peer60) ecosystem on 549 independent physicians to understand how they choose a destination provider for their patient referrals. Most surveyed say they don't currently have a preferred hospital partner, giving **health systems a great opportunity to become the preferred partner for independent physicians.**

According to **recent data from Accenture**, seven percent of patients have switched healthcare providers due to a poor customer experience, which results in a loss of more than \$100 million in annual revenue per hospital. Additionally, U.S. hospitals spend **more than \$1.5 billion annually on advertising**, yet much of this is lost if providers and patients who want to do business with the hospital cannot easily do so. Below are insights to help make a hospital a referral destination of choice.

Key Takeaways

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• **Opportunity Knocks:** More than half of physicians don't have a preferred hospital partner, which means many hospitals are not realizing the full economic value of community partners.
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• **Time-Saving Services Attract:** It's easier than you think to attract independent providers with convenient services – nearly 40 percent want insurance authorizations and self-scheduling.
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• **Convenience is King:** Roughly half of independent physicians put a high value on patient preference and convenience in their choice of hospital partner.

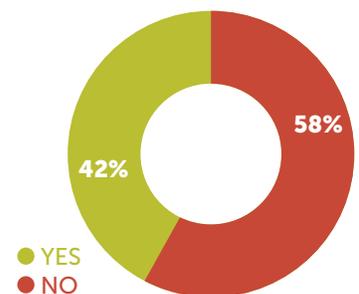
Independent Physician Survey Results

Physician Preferences for Hospital Partners

Does your organization have one or more preferred hospital partners?

Forty-two percent of surveyed physicians said yes, but a majority (58 percent) said no (see figure 1). This means **hospitals have not gained the full economic value of their community partners, resulting in an opportunity to become the referral destination of choice.** Hospitals face dual pressure from competition and the move to value-based payment. It's more important than ever to not only provide outstanding value to referring providers' patients, but to also be easy to do business with from both the provider and patient point of view.

Preferred Hospital Partner
Figure 1



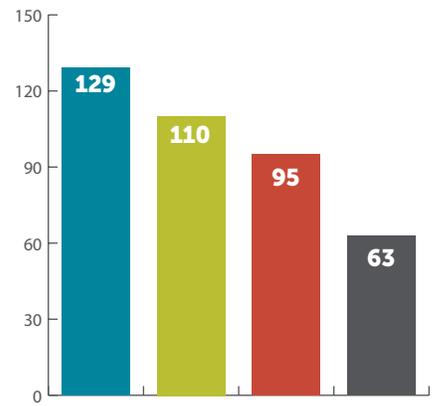
Sample size: 544 respondents

What are the most important factors for determining where to refer patients?

Physicians clearly value shared mission and commitment to quality care for their patients. In today’s changing market, convenience – for patients, as well as referring providers – will drive patient preference and continue to increase in importance (see figure 2). Patient expectations continue to evolve as they use services like Uber, Airbnb, and Amazon, which influence their expectations for how their healthcare interactions should work.

Hospitals and their physician partners who provide convenient, patient-focused care coordination and access will have a competitive advantage.

Physician Referral Factors
Figure 2



Sample size: 213 respondents

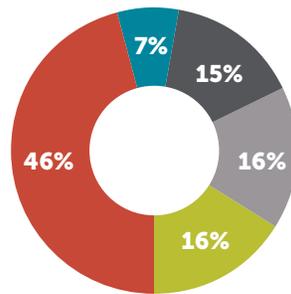
- 61% Known quality of care
- 52% Patient preference
- 45% Convenience
- 30% Shared mission/vision

Hospital Partners Gain Volume

What percentage of order and referral volume is going to top hospital partners?

Of those who have preferred hospital partners, 46 percent of physicians said that more than 70 percent of their orders go to top partner(s) (see figure 3). Forty-six percent also said more than 70 percent of their referrals go to top hospital partner(s) (see figure 4). These results reinforce that **once a relationship built on trust, convenience and service is established with a preferred destination hospital, referring physicians will continue to send patients to that hospital.**

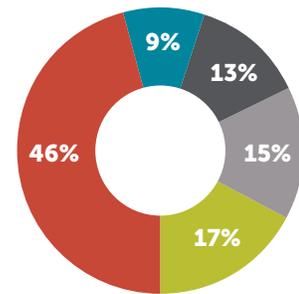
Order Volume
Figure 3



Sample size: 233 respondents

- More than 70%
- 20-30%
- 31-50%
- 51-70%
- Less than 20%

Referral Volume
Figure 4



Sample size: 214 respondents

- More than 70%
- 20-30%
- 31-50%
- 51-70%
- Less than 20%

Value of Physician Services

How important are authorizations and self-scheduling options?

Thirty-eight percent of physicians are likely to refer to a different hospital if the hospital provides authorizations to its community physicians (see figure 5). Thirty-seven percent are likely to refer to a different hospital if the hospital offers community providers self-scheduling tools (see figure 6).

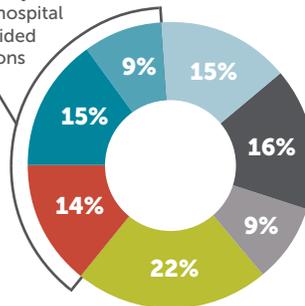
If you adopt these two functions and do them well, you will be more attractive to referring providers. **More than ever, providers and their patients expect smooth care coordination when it comes to referrals, orders, authorizations, scheduling, and payment.**

What are the most important self-scheduling features?

Convenience and good communication are themes in these self-scheduling features (see figure 7). **Physicians want to refer patients to hospitals that are easy to work with, provide communication back to them about their patients, and make the experience smooth and convenient for the patient.** Similarly, today's healthcare consumer expects easy access and engagement when dealing with the healthcare system. A recent Accenture report found that 77 percent of patients think the ability to book, change or cancel appointments online is important, yet only 2.4 percent of appointments today are patient self-scheduled.

Authorizations
Figure 5

38% are likely to refer to a different hospital if they provided authorizations

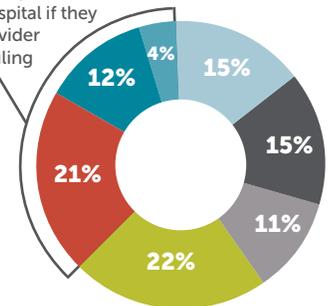


Sample size: 209 respondents

- 1 - Not likely at all
- 2 - Not very likely
- 3 - Unlikely
- 4 - Not likely or unlikely
- 5 - Likely
- 6 - Very likely
- 7 - Extremely likely

Provider Self-Scheduling
Figure 6

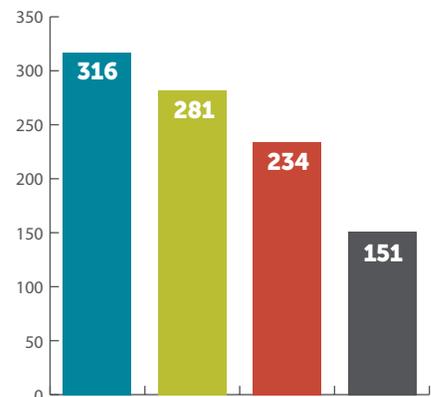
37% are likely to refer to a different hospital if they offered provider self-scheduling



Sample size: 202 respondents

- 1 - Not likely at all
- 2 - Not very likely
- 3 - Unlikely
- 4 - Not likely or unlikely
- 5 - Likely
- 6 - Very likely
- 7 - Extremely likely

Self-Scheduling Features
Figure 7



Sample size: 477 respondents

- 66% Appointment confirmations and instructions
- 59% Patient reminders
- 49% Scheduling for a broad range of procedures
- 32% Patient self-scheduling

Notes on Methodology

SCI Solutions used data collected through Reaction's platform, a Research as a Service ecosystem with access to more than 500,000 healthcare professionals, to author this report. The results include survey responses from 549 independent physicians in the U.S.

All decimals in this report are rounded to the nearest percentage point. This may result in certain numerical totals adding up to slightly more or slightly less than 100 percent.

The estimates and opinions expressed in this report are based on the survey results only.

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Reaction

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