

# Uncovering the Opportunities of a Waiting Room



How savvy physicians are leveraging technology to create synergy between the waiting area and the consulting rooms, transforming patient experiences for the better and releasing efficiency to their bottom line.

75%  
is spent waiting

YOUR  
WAITING ROOM



I ARRIVE IN THE  
WAITING ROOM.

YOUR  
WAITING ROOM



I ARRIVE IN THE  
WAITING ROOM.

MY ONLY DISTRACTION IS THE CLOCK.

5  
MINS

AS I RESTLESSLY SCAN THE ROOM, THE BUZZ FIT  
HEALTHCARE CHANNEL GRABS MY ATTENTION.

I BEGIN RESEARCHING MY SYMPTOMS ONLINE,  
THE OUTCOMES ARE SCARY.

10  
MINS

THE ENTERTAINING, COLORFUL HEALTHCARE CONTENT IS APPEALING, I  
BEGIN TO RELAX AND FEEL MORE COMFORTABLE.

MY FRUSTRATION GROWS, AS THE WAIT CONTINUES

15  
MINS

HIGHLY ENGAGED, THE TIME FLIES BY.

I THINK ABOUT LEAVING.

20  
MINS

I LEARN ABOUT THE SERVICES YOUR PRACTICE  
OFFERS AND HOW IT CAN HELP ME.

THERE MUST BE A BETTER HEALTHCARE  
EXPERIENCE THAN THIS.

25  
MINS

I'M REALLY GRATEFUL FOR THE ATTENTION, AND I  
START PLANNING MY OWN HEALTHCARE JOURNEY.

I FEEL DISSATISFIED AND IN AN IRRITABLE STATE OF MIND, WHEN I GET  
CALLED FOR MY CONSULT.

30  
MINS

I FEEL SATISFIED, CALM AND PREPARED FOR MY CONSULT,  
I GET CALLED IN - I'M READY!

25%  
is in the  
consultation

- ❌ PATIENTS RESENT THE TIME THEY HAVE WASTED.
- ❌ THEY ARE DETERMINED TO MOVE PRACTICE AND NOT REPEAT THIS EXPERIENCE AGAIN.
- ❌ REVENUE IS LOST IN THE FORM OF POTENTIAL REFERRALS AND RETURN VISITS.
- ❌ YOUR PRACTICE MUST NOW SPEND UP TO 25 TIMES AS MUCH ACQUIRING ONE NEW PATIENT THAN WAS NEEDED TO RETAIN THE EXISTING ONE.

- ✅ SATISFIED PATIENTS ARE 94% MORE LIKELY TO RECOMMEND YOUR PRACTICE.
- ✅ A SIGNIFICANT BOOST TO REVENUE THROUGH BETTER PATIENT RETENTION AND LUCRATIVE REFERRALS.
- ✅ HEALTH LITERACY IMPROVES AND ENGAGED PATIENTS PLAY A MORE ACTIVE ROLE IN CONSULTATIONS.
- ✅ ENHANCED HEALTHCARE EXPERIENCE FOR EACH AND EVERY PATIENT.



# Healthcare researchers have found that dissatisfied patients are

Likely not to recommend their provider.

**81%**



while satisfied patients were 94% more likely to refer to provider.

**94%**



According to Accenture, **44%** of patients chose their healthcare provider **based on personal recommendations**, and that these recommendations influence selection more than in any other industry.<sup>1</sup>

## Digital Disruption

Digital disruption continues to change the world that we live in and like it or not, it is here to stay, creating an “**adapt or die**” style proposition for business decision makers. Those who have adapted to embrace technology have flourished in recent years, cashing in on first mover advantage. Many industries have focused on the ability of technology to scale interactions with customers, without the need for significant investment of time or resources. The ability of technology to enhance the experience of customers is a passion for **Buzz Fit**, so we commissioned research to explore the opportunity within the healthcare environment and the results are startling.

During the course of the research, it became apparent that while many industries have **identified opportunities** to transform the customer’s experience in waiting areas for the better, healthcare providers have fallen behind.

### Healthcare waiting areas fail to acknowledge customers for up 75% of the time they spend with their provider.

Evidence suggests that this failure to acknowledge customers is a breeding ground for bad habits and negative emotions, patients anxious about their condition use mobile devices to self-diagnose, which in turn frustrates physicians during the consultation. Alternatively, patients and carers become frustrated as **lack of engagement magnifies** their perception of time spent waiting. Alternatively the use of technology to deliver engaging and educational healthcare content to waiting areas creates an immersive experience for patients and carers from the moment they walk in the door to the moment they leave again. But don’t take our word for it, **check out the research for yourself.**

# The cost of Waiting.

Far from a hallmark of positive customer experiences,

**“the waiting room wait”**

is a cause of frustration, anxiety, and annoyance for patients and providers alike. It's a common driver of patient grievances, and often a source of irritation by providers, who must bear the brunt of the complaints.

According to the 2018 Vitals Index report, patients in the United States across medical specialties currently wait an average of 18 minutes and 13 seconds before seeing their physician.<sup>2</sup> In 2017 healthcare researchers reported that **4.4 million** patients experienced waits of **20 minutes**; while a further 2.1 million **patients waited over 30 minutes**.<sup>3</sup> This lost service time equates to millions in unrealized revenue.

When patients leave because of wait times, revenue is lost, and future revenue is foregone because of the missed opportunities for referrals or word-of-mouth recommendations.

Satisfaction is often linked to the willingness of patients to give referrals. Considering that patients are twice as likely to complain about their healthcare providers, **the chance to lose lucrative referrals is high**.<sup>6</sup>

Healthcare researchers have found that dissatisfied patients are **81%** likely not to recommend their provider, while satisfied patients were **94% most likely to refer to practices**. According to Accenture, **44%** of patients chose their healthcare providers based on personal recommendations, and that these recommendations influence selection more than in any other industry.<sup>7</sup>



**30% of patients to leave a medical appointment without a consultation account of protracted wait times.**<sup>4</sup>



**One in five patients will change medical practice based on excessive wait times.**<sup>5</sup>



**15% to 20% of patients to miss or skip their appointment because they cannot afford the wait.**<sup>6</sup>

“ The real problem isn't just the duration of a delay. **Its how you experience that duration.** ”

Richard Larson, MIT Professor and Queuing Theorist.<sup>8</sup>

Healthcare researchers have established a link among perceived wait times, patient satisfaction, and provider ratings.<sup>9</sup> Patients overestimate the time spent waiting and, in turn, rate the level of satisfaction based on these misperceptions; both positively and negatively.<sup>10</sup>

As people generally tend to overestimate **their waiting time by 36%**, interventions to influence the perception of time has merits.<sup>11</sup> Activities that make a **30-minute wait feel like 20 minutes** can go a long way in improving patient satisfaction. In fact wait-intense industries continually look for ways to occupy customers while they wait, to influence their perception of time. Many retailers and financial institutions have installed digital signs as they are reported to **reduce perceived wait times by 35%**.<sup>12</sup> In doing so they have entirely offset the bias towards overestimating wait times, allowing them to focus on the real and tangible issues affecting their waiting areas.

**Two widely known examples of waiting interventions are:**

- 1) Disney, which often overestimates wait times for rides and curves lines around stores to induce spending;<sup>13</sup>
- 2) The Houston airport, which increased the length that passengers took to reach the baggage claim to reduce complaints.<sup>14</sup>

Total health expenditures are expected to grow at CAGR of 3.1%<sup>15</sup> over the next five years, outpacing most other sectors.

Strategies aimed at influencing the **36% of wait time caused by perception** could prove to be the low hanging fruit in the waiting area when compared to addressing **the 64% of real waiting time** driven by a myriad of interdependent and complex issues. A recommendation put forth by several healthcare researchers.<sup>16</sup>

“ Occupied **time feels shorter** than unoccupied time. ”<sup>17</sup>

““

David Maister, Operations Expert

**OCCUPIED**  
TIME FEELS SHORTER  
**THAN UNOCCUPIED**  
**TIME**



””

““

The valuable moments before a consult.

**Primary care waiting rooms** are not conceived of or used by providers as **spaces to engage patients** in health education.<sup>18</sup>

””

Waiting rooms are often treated as spaces to disseminate health information such as pamphlets, posters, signs, and notice boards. However, most approaches are haphazard and **lack a clearly defined communication strategy**.<sup>19</sup> There is a growing body of evidence that targeted waiting room interventions can lead to better health outcomes, patient satisfaction, and improve the consultation experience.

An international study covering six countries, **33** randomised trials, and various clinic settings, found that health information interventions help to improve question-asking activity and patient satisfaction.<sup>20</sup> **These benefits are most pronounced** when they take place immediately before the consultation.<sup>21</sup> The finding suggests that the moments spent by the patient just before the consult is influential in shaping the experience.

Given that patients, on average, ask two questions, any increase can provide them with the opportunity to **feel more satisfied** with their experiences.<sup>22</sup> It also has the potential to impact health literacy as question-asking is a predictor of knowing more about health.<sup>23</sup>

The potential for interventions for people with low-health-literacy is startling, given the sheer number of patients. According to the Department of Health & Human Services, **88% of adults**, or **77 million** people in the United States are considered to have low-health-literacy.<sup>24</sup> This patient population is reported to ask fewer questions during their consultations,<sup>25</sup> more likely to be dissatisfied with physician communications, and less likely to give their physicians high ratings.<sup>26</sup> be dissatisfied with **physician communications**, and less likely to give their **physicians high ratings**.

## The impact of meaningful consults.

**"The willingness of providers to explain information is the most important reason for selecting a physician"**

National Ambulatory Medical Care Survey

Consultation content is strongly linked to positive patient-provider experiences more so than the duration of time spent. Many patients often report good experiences from very short consultations.<sup>27</sup> **Patients are often more satisfied when time is spent talking about their specific interventions and when they receive health education.**<sup>28</sup>

Providing patients with relevant materials before the consult has been shown to leave more time to discuss specific questions and address concerns.<sup>29</sup> **With an average consult time of 10 mins**<sup>30</sup>, pre-consult activities that induce question-asking behavior allow a greater proportion of the time for education, this can help to improve the overall experience for both patient and provider.

Low-quality consult experiences can directly influence revenues as they impact patient satisfaction, provider referrals, and practice ratings. Research conducted using the National Ambulatory Medical Care Survey, reported that "the willingness of providers" to explain information is the most important reason for selecting a physician.<sup>31</sup> A peer-reviewed study of Internet-based physician rating sites reported satisfaction with "time spent with providers" as a top theme amongst site-users.<sup>32</sup>

Spending more time providing health education in the waiting room or during a consult can influence a patient's health information seeking process. A recent study showed that higher quality of patient-provider communication reduced the odds of watching health-related videos on social media.<sup>33</sup> According to the **Pew Research Center**, health information seeking is one of the most popular activities online.<sup>34</sup> Given that patients trust information from hospitals, medical societies, and providers more than any other source,<sup>35</sup> waiting room interventions could actively influence this seeking behavior and mitigate resulting frustration in consults when time is spent debunking misinformation found online.

“

**Healthcare Innovators understand the need for a compelling, holistic customer-centric experience,**

**building in efficient processes that eliminate sitting and waiting and invite visitors to engage and get inspired <!--**

”

## Strong market performers drive repeat business

Consider that:



The cost to acquire a new customer is 5 to 25 times more expensive than retaining an existing one.<sup>38</sup>



80% of a business's profits come from just 20% percent of its existing customer base.<sup>39</sup>



An increase in customer retention by 5% can lead to an increase of profits by 25% to 95%.<sup>40</sup>



A 2% increase in customer retention has the same effect as decreasing costs by 10%.<sup>41</sup>

## Strong market performers drive repeat business.

The transformation of patients into consumers is occurring rapidly as rising expenditures burden patients to **take on a much larger share of healthcare costs**. As a result, patients are approaching their choice in providers and services as they do with other goods and services; with a focus on their experience, the provider's reputation, and overall service quality.<sup>37</sup>

Initiatives **focused on loyalty building** and maintaining a patient base drive higher returns more so than any targeted efforts to recruit new patients. Revenue generated from current patients is much more valuable than the revenue generated from new patients.

Healthcare environments that can successfully build loyalty through enhanced experiences are better positioned to achieve revenue goals, as **loyalty drives performance and boosts utilization of services**, while at the same time reduces patient defection.<sup>42</sup> If done well, these enhanced experiences can also sway patients away from competitors.

A space for marketing influence.

“If **marketing** has one goal, it's to **reach consumers** at the moments that most influence their decisions<sup>43</sup>”  
McKinsey & Company.

**Waiting rooms** can be considered a coveted advertising space as they provide the ingredient for successful marketing campaigns - a steady volume of captive customers who must wait. Health product companies spend millions each year marketing to providers, **who control the access and information offered in these spaces**.

Activities to influence customers at the place of purchase is a hallmark of effective marketing. Because, as behavioral research has shown,



change their minds because of something that they see, learn, or do at the point of purchase.<sup>44</sup> This behavior holds across both physical and digital spaces.

Messaging is pivotal to influencing the decision. According to marketing research, consumers are most responsive to messages that related to the task at hand and their current state of need.<sup>45</sup> Effective messaging at the point of purchase has been shown to reduce frustration, make shopping entertaining, and induce sales lifts ranging from **9.2% to 97.1%**.<sup>46</sup> This outcome is why **Amazon cleverly** prompts product recommendations during the purchasing process.

Audiovisual aids with targeted messages placed in waiting rooms have proven to be a successful way to increase patient participation in care programs,<sup>47</sup> purchase supplementary products such as vaccines,<sup>48</sup> and enhance a patient's knowledge base.<sup>49</sup>

As the probability of successfully selling to an existing customer is **60% to 70%**,<sup>50</sup> targeted marketing in waiting rooms that engage existing patients has the potential to offer higher and better returns on marketing dollars than external activities to attract new patients.

Satisfied patients drive repeat business, generate lucrative referrals, and reduce the need for wasteful marketing expenditures.

Practices with a high rate of repeat patients are likely to generate time efficiencies as generally repeat consultations are faster; even if it's a repeat patient with a new problem.

## Conclusion

**Healthcare providers** have long used the waiting room as a passive space for health promotion and education. Yet, as the convergence of consumerism and healthcare continues to unfold at a rapid pace, failure to reimagine the

**waiting room as a strategic space to influence the patient's experience**

could likely lead to a loss of reputation, increased patient defection, and lower quality ratings; all of which can leave a **substantive mark on profitability**.

A waiting room strategy that targets perceptions of time, proactively responds to the desire for **health information**, and influences the effectiveness of the consult may result in higher incidences of patient satisfaction; while, simultaneously inducing practice efficiencies.

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