



FROM SURVEY TO  
STRATEGY:

# Insights from Patients, Providers & CFOs

MAY 14, 2025

BDO USA, P.C., a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.



# With You Today



**BRAD BOYD**

Principal

National Practice Leader  
Healthcare Management Consulting  
Co-Leader, The BDO Center for Healthcare  
Excellence & Innovation

[brad.boyd@bdo.com](mailto:brad.boyd@bdo.com)

# Learning Objectives



Examine the insights and priorities across two major stakeholder groups: patients & providers



CFOs outlook post election



Share insights into AI strategy in healthcare

# Agenda



2022 Patient Experience Survey (refreshed in 2024)



2024 Clinician Satisfaction Survey



2025 Healthcare CFO Survey

# 01

## 2022 Patient Experience Survey (Refreshed in 2024)



**BDO**

# Key Findings



## Access

**91%** of Americans have a healthcare provider for **routine medical care**, and 92% have some type of health insurance.



## Delayed Care

**58%** of Americans admit to **delaying seeking routine medical care** in the past 12 months.



## Cost Transparency

**Nearly one in three** Americans (31%) **haven't tried to obtain cost estimates** for their medical care.



## Portal to Care

**Roughly one in five Americans** (19%) have **never used a patient portal**. Of those who have, 87% find it helpful.



## Friction

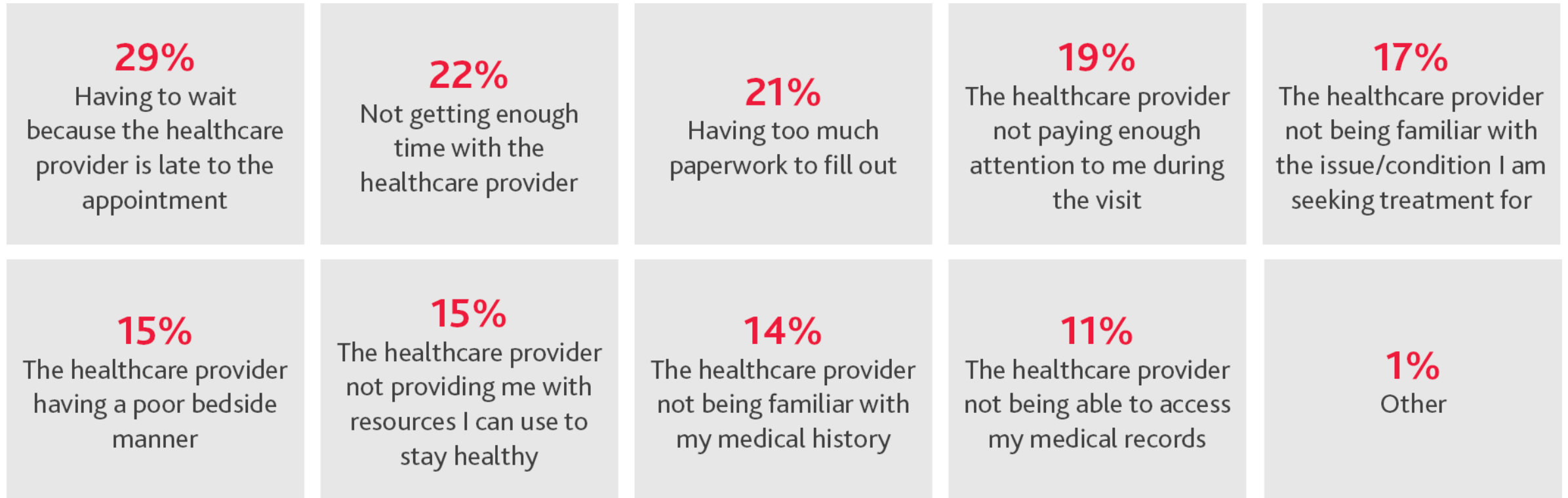
**79%** of Americans have encountered **frustrations** when seeking routine medical care, and **69%** have experienced frustration during a routine medical care appointment.

## 79% of Americans encountered frustrations when seeking care. Here are their top frustrations:



Note: Respondents were permitted to select more than one response.

## 69% of Americans encountered frustrations at routine care appointments. Here are their top frustrations:



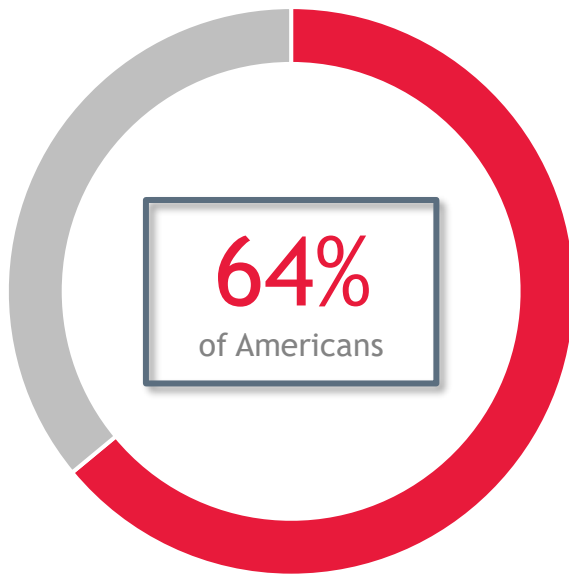
Note: Respondents were permitted to select more than one response.

\*Includes both in-person and telehealth visits

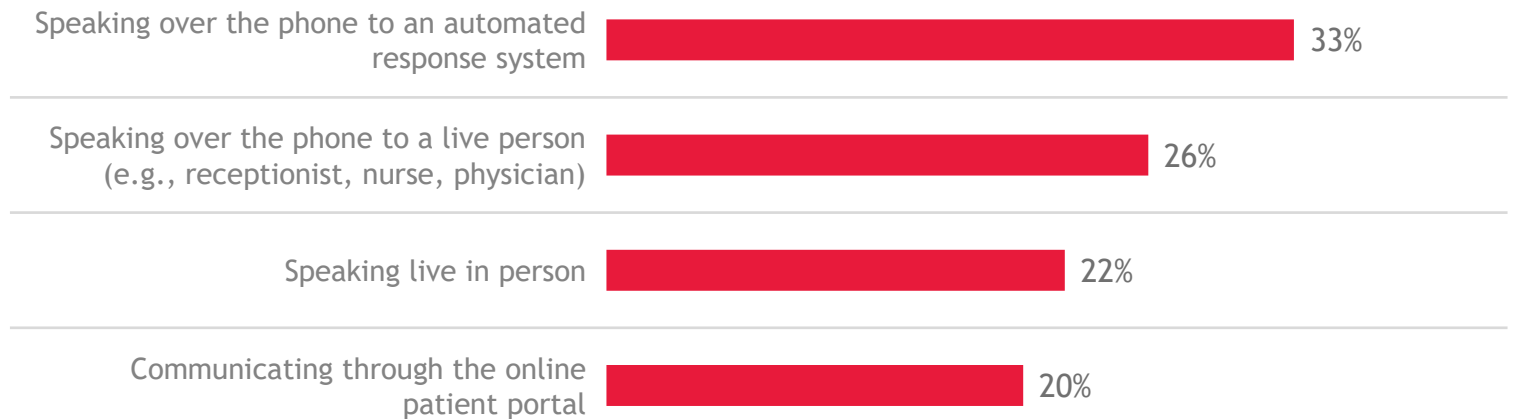


Approximately two-thirds of Americans experience frustration when communicating with a Healthcare Provider. Frustration is most likely to occur when speaking over the phone to an automated response system.

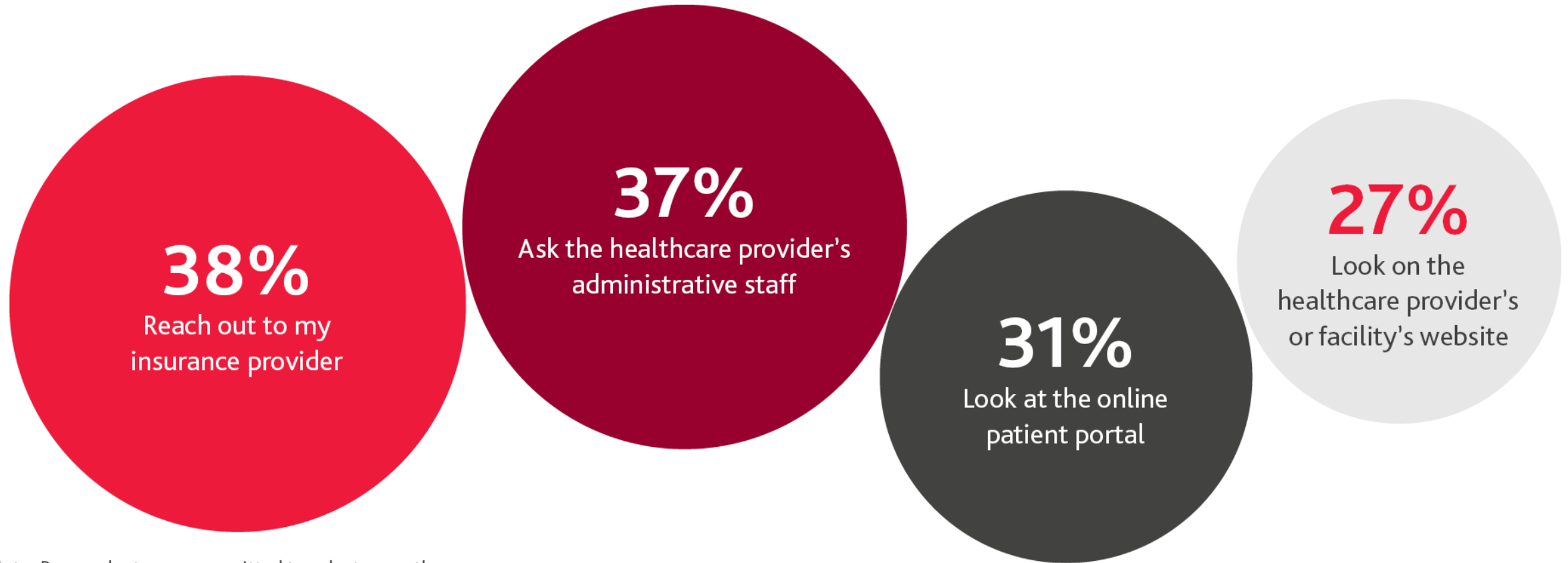
### Experience Frustration When Communicating with a HCP



### Specific Frustrations When Communicating with a HCP



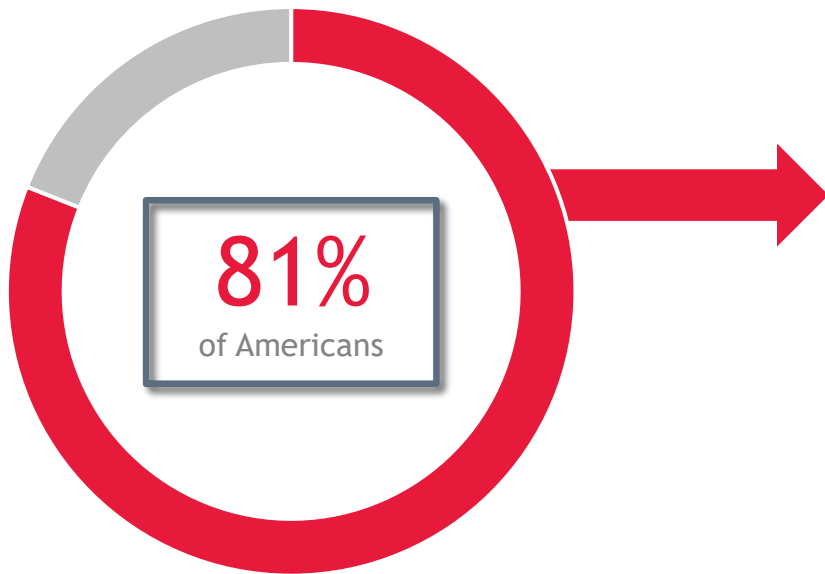
69% of Americans have tried to obtain cost estimates for their care.  
Here's where patients go to easily obtain them.



Note: Respondents were permitted to select more than one response.

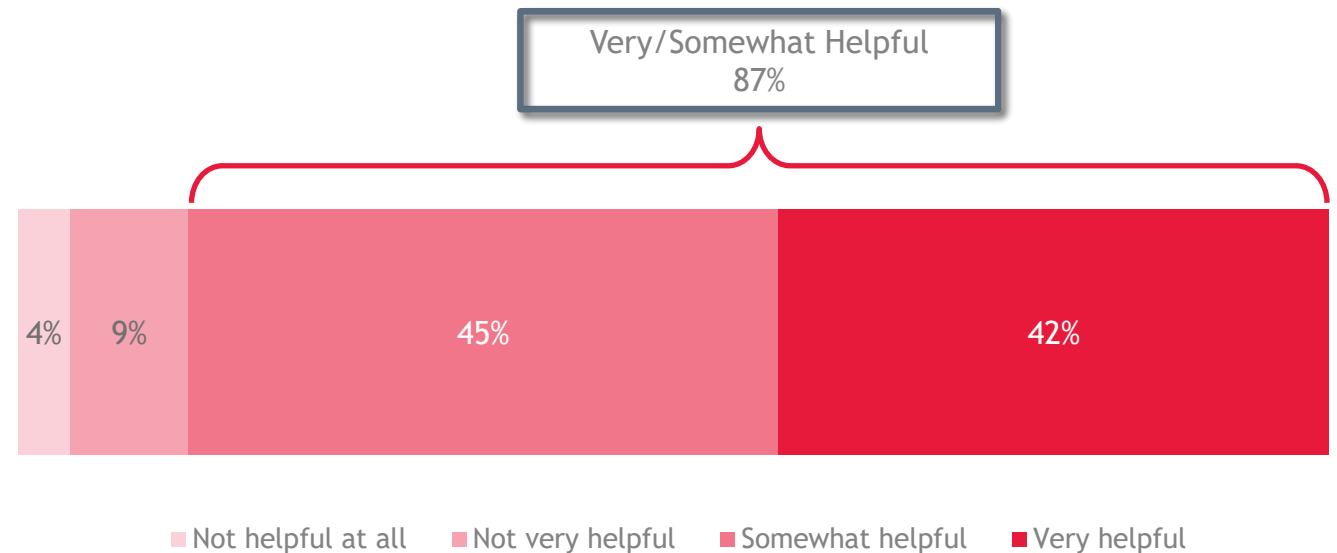
Over eight in ten Americans (81%) have used online patient portals.  
Among those who have used them, a large majority find them helpful.

### Online Patient Portal Usage



### Helpfulness of Online Patient Portals

*Among Those Who Use Patient Portals*



# 02



## Clinician Satisfaction Survey Healthcare Takes on Clinician Burnout

# Key Findings



The biggest challenges to **clinician morale** over the past year have been **clinician turnover and understaffing** and **compassion fatigue/burnout**



Organizations plan to **fill clinician staffing** gaps over the next year by **increasing automation of patient communication**, offering **more telemedicine** options, and **increasing full-time headcount**



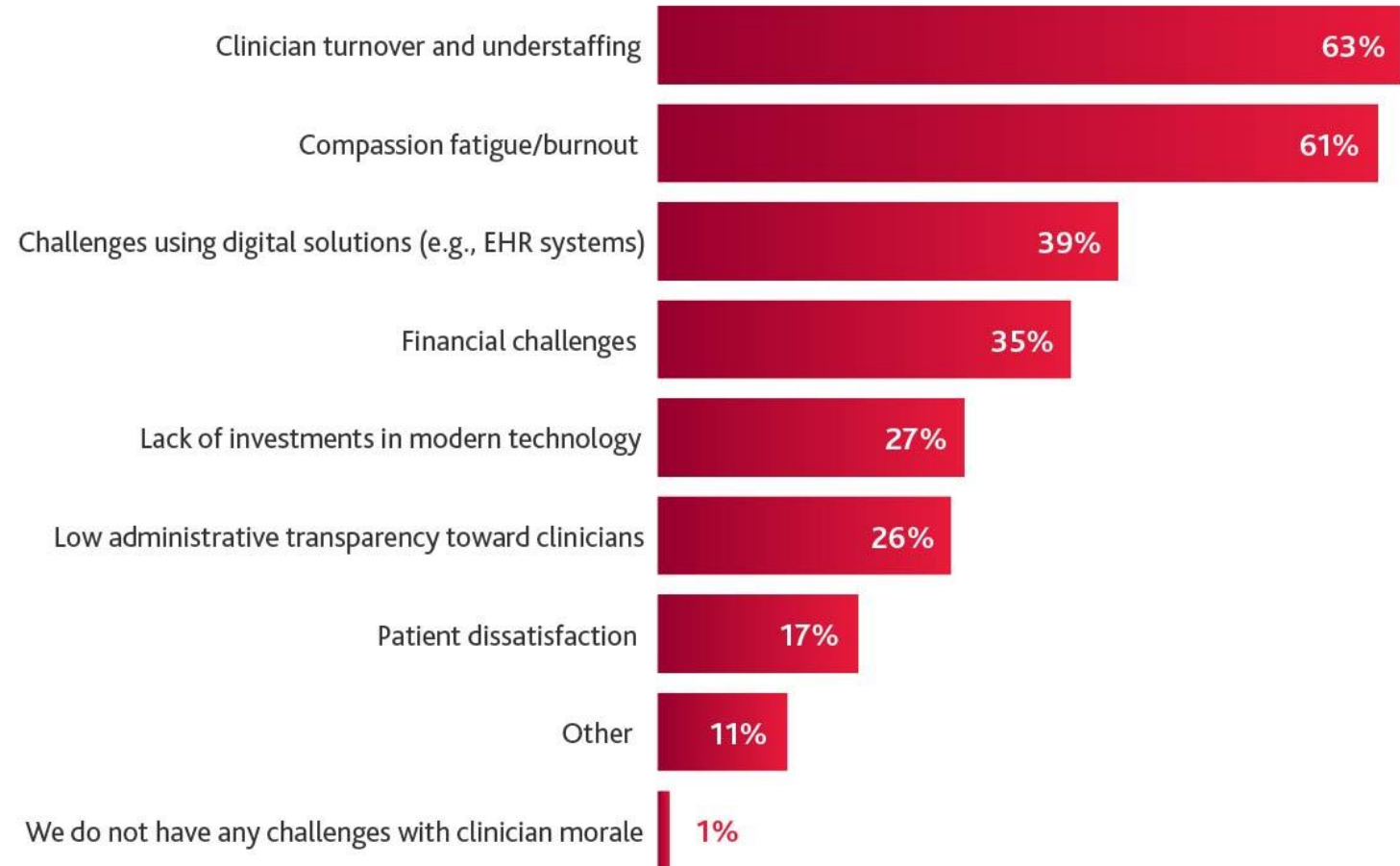
The greatest **patient engagement challenges** over the past year include encouraging patient compliance, **increasing complications from comorbidities and deferral of care**, and challenges with patient scheduling



Organizations expect to see the most technological value in **improving the integration of technologies** to allow for true interoperability and **automating communications** between patients, providers, and clinicians

# Top Drivers of Clinician Burnout and Morale Issues

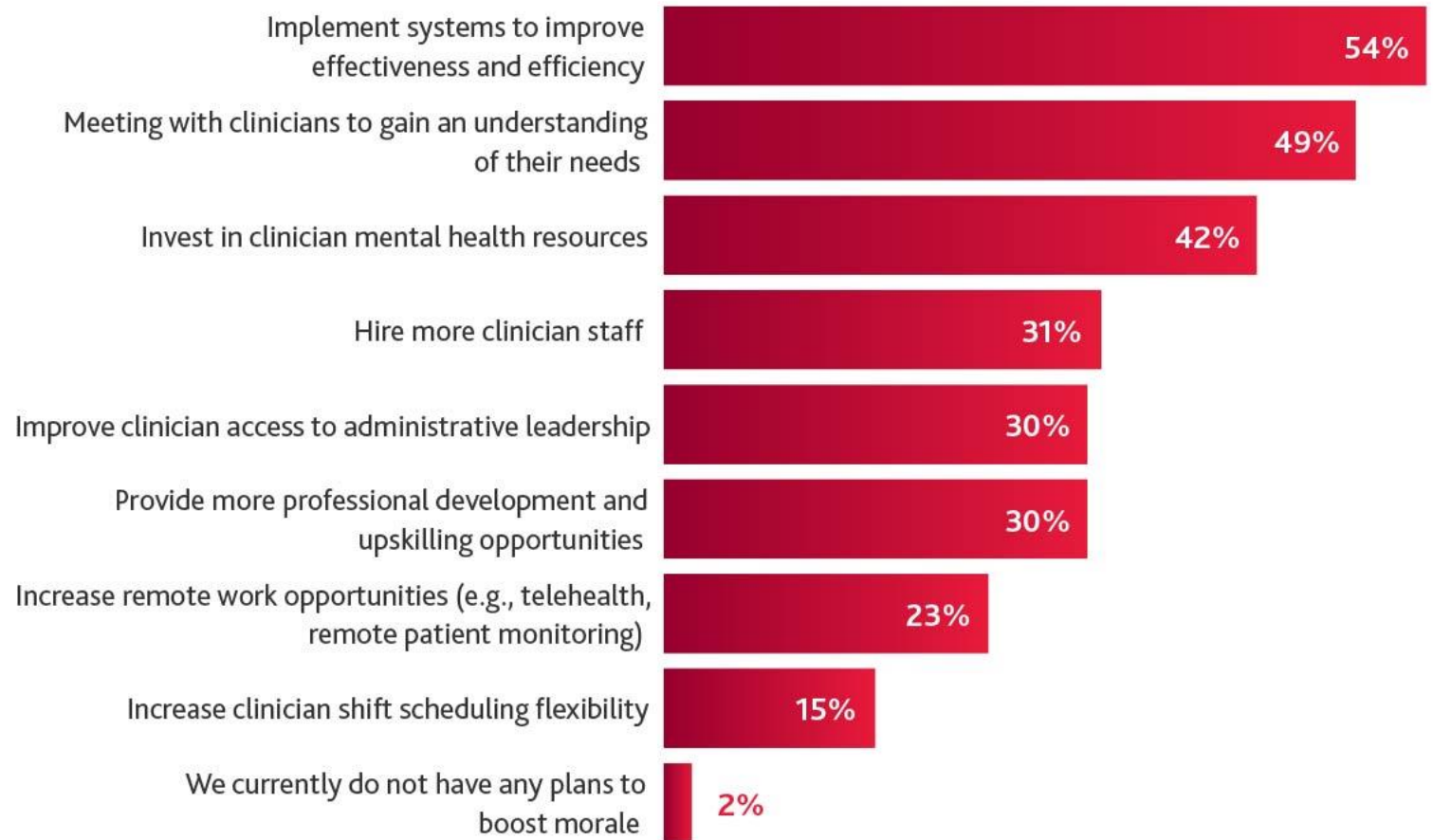
What have been your organization's top three clinician morale challenges in the past 12 months?



# Boosting Clinician Morale

**54%** of clinical leaders plan to implement systems to improve effectiveness and efficiency in the next 12 months.

What are your organization's top three priority plans to boost clinician morale in the next 12 months?



# Boosting Clinician Morale and Avoiding Technology Adoption Burnout

- ▶ Consider how clinician input can improve the planning and implementation process
- ▶ Identify options for increasing access to diverse wellness and mental health resources
- ▶ Determine how automation and artificial intelligence (AI) can help take certain tasks off clinicians' plates
- ▶ Create an integration strategy and change management plan to help prevent newly adopted technology from worsening clinician burnout

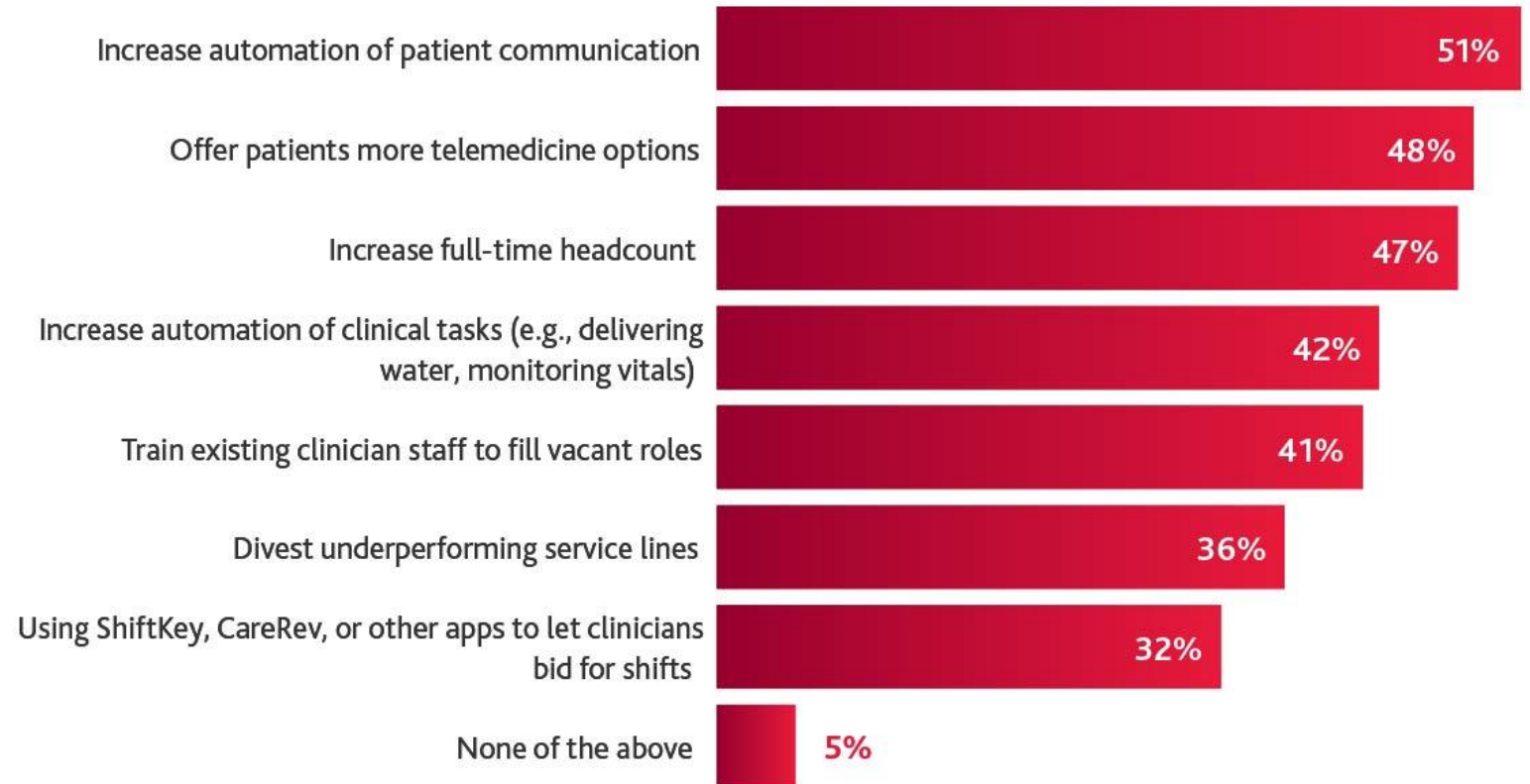




# Closing the Staffing Gaps

Over half (**51%**) of clinician leaders plan to fill clinical staffing gaps with increased automation of patient communications in the next 12 months.

How does your organization plan to fill clinician staffing gaps in the next 12 months?



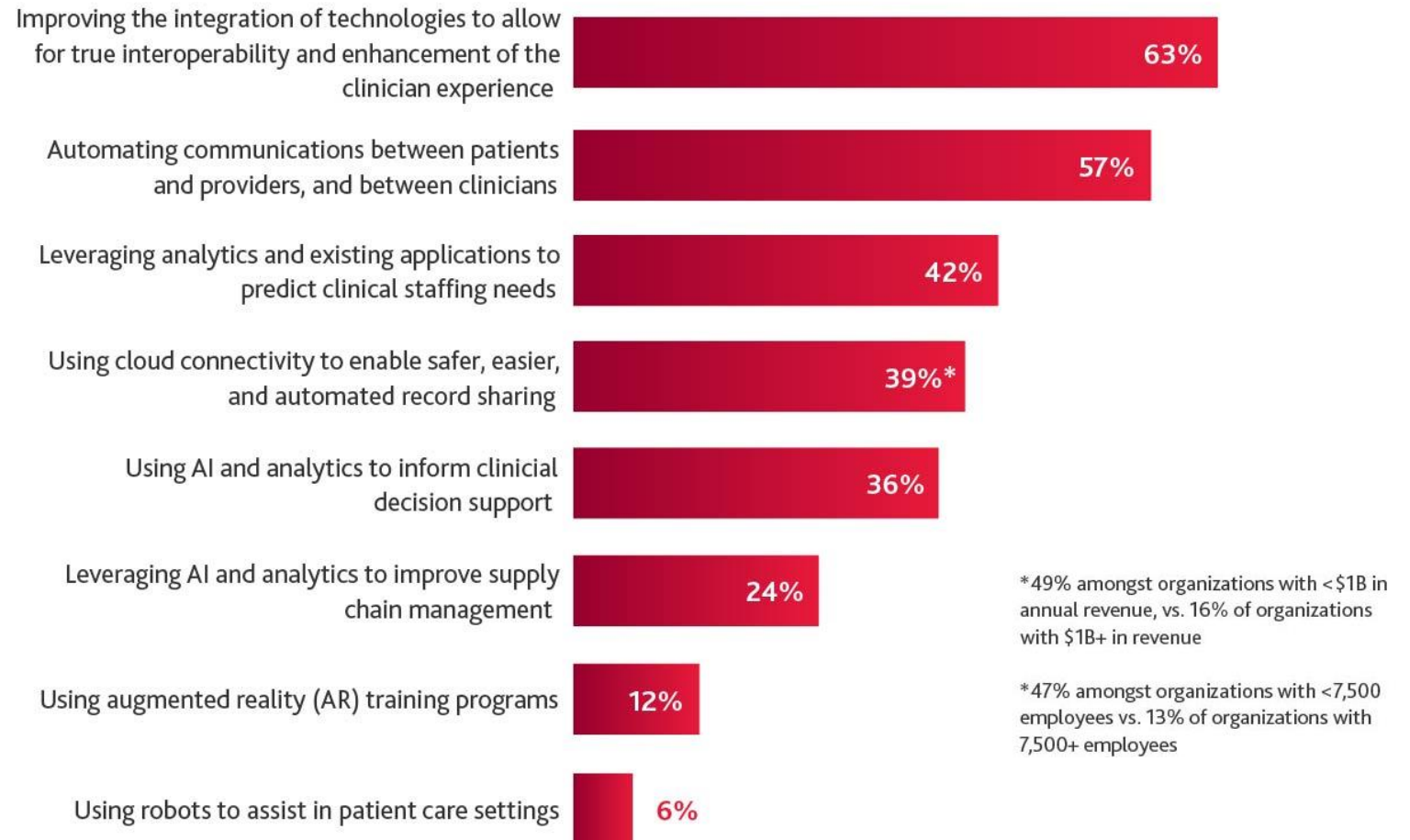
Source: BDO's 2023 Clinician Experience Survey

# Closing the Staffing Gaps with Technology

## Exploring AI

- ▶ **42%** of clinical leaders are already investing in AI/ML or have plans to invest in it.
- ▶ Access to high-quality data for AI/ML models is crucial.
- ▶ Organizations must consider their level of data maturity and how they'll handle privacy, AI hallucinations, and other potential hurdles.

Which three new technologies do you expect to be the most valuable to you in the next 2 years?



Source: BDO's 2023 Clinician Experience Survey

# Top-ranked Patient Engagement Challenge

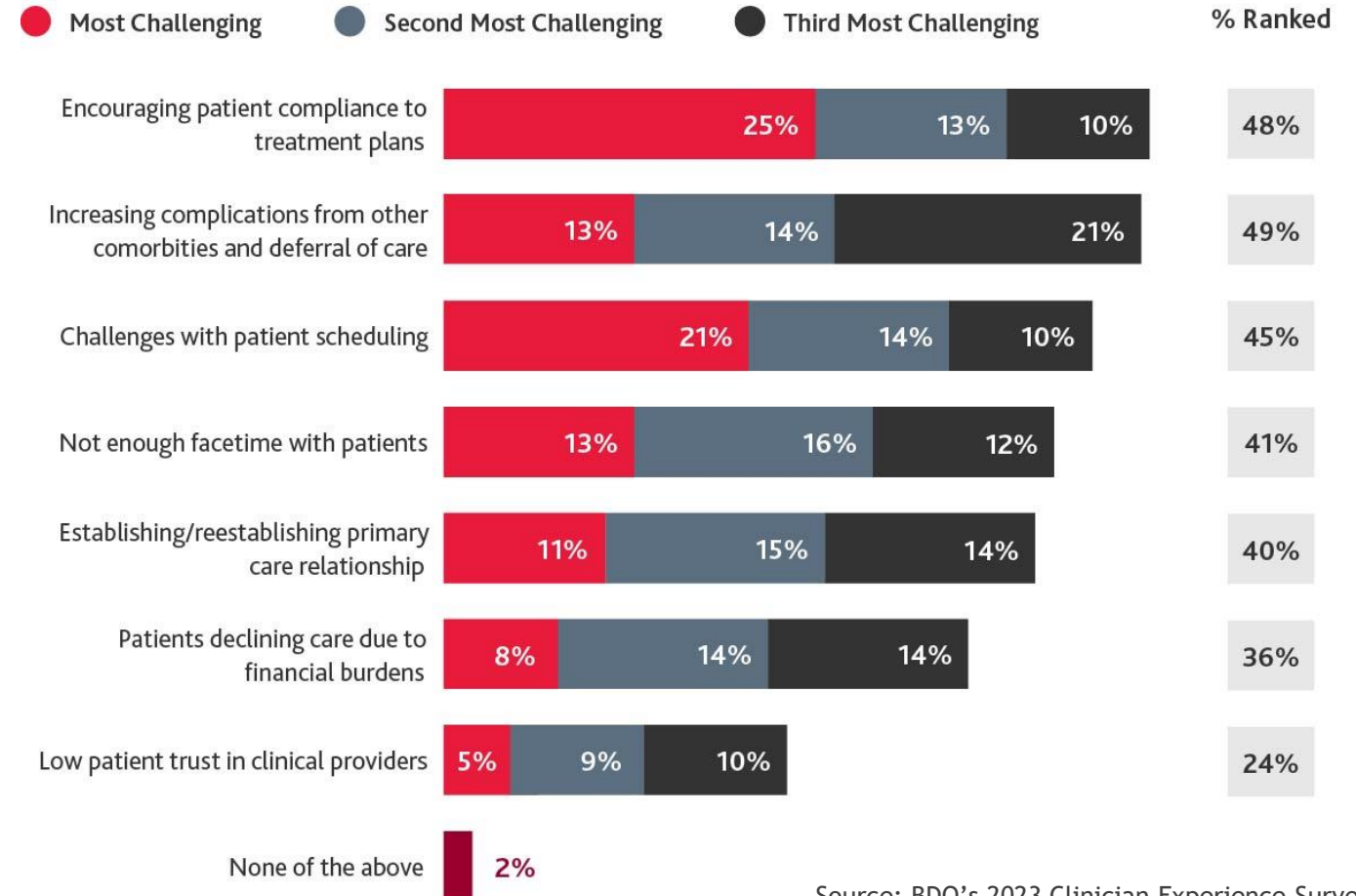
The top-ranked patient engagement challenge is increasing complications from other comorbidities and deferral of care.

## Reestablishing the Primary Care Relationship

- ▶ Only **69%** of Americans have a primary care physician, according to BDO's 2022 Patient Experience Survey.
- ▶ Reestablishing primary care relationships is crucial to improving health outcomes across patient populations.
- ▶ Technology solutions can make primary care more accessible and convenient for a greater number of patients.

Note: respondents were asked to rank their top three in order

Of the following, which have been your three greatest patient engagement challenges in the past 12 months?



Source: BDO's 2023 Clinician Experience Survey

# Improving Patient Engagement

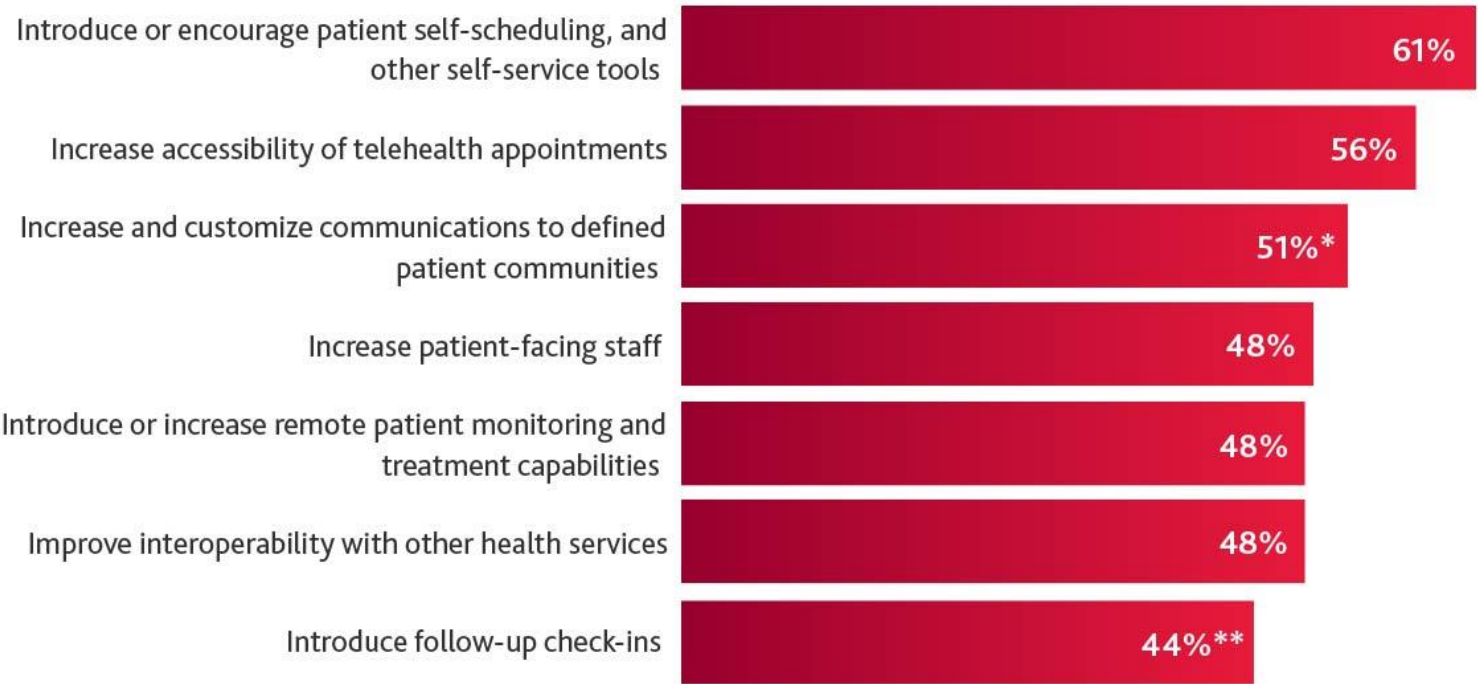
**61%** of clinical leaders plan to encourage patient self-scheduling, and other self-service tools to increase patient engagement in the next 12 months.

\*57% among those in Clinical Director or Executive Leadership job functions, vs. 35% of those in Clinician functions

\*\* 56% among organizations with private ownership vs. 33% of organizations with non-profit or public ownership

How does your organization plan to increase patient engagement in the next 12 months?

Respondents selected an average of **four** areas to increase patient engagement

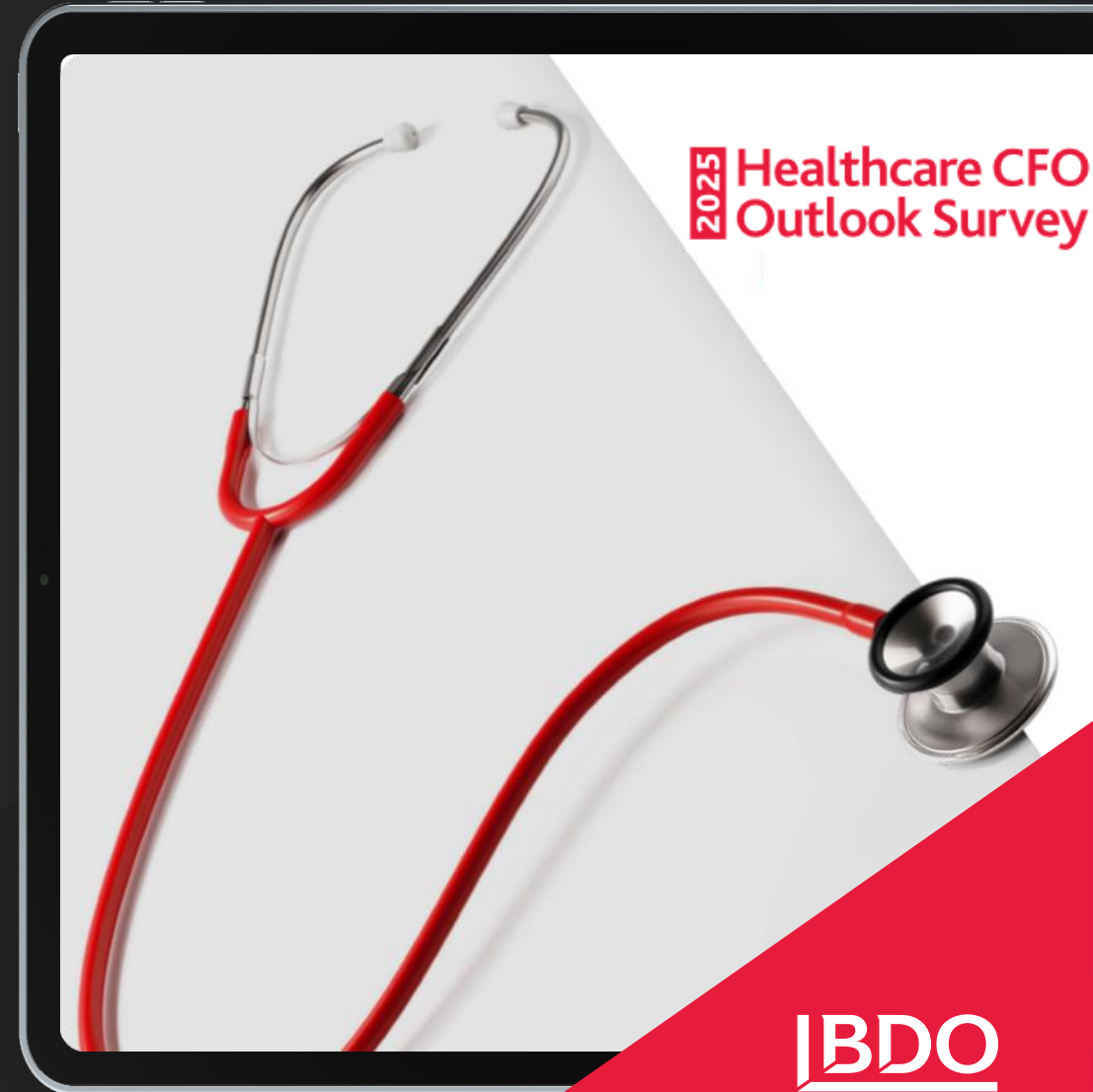


Source: BDO’s 2023 Clinician Experience Survey

# 03

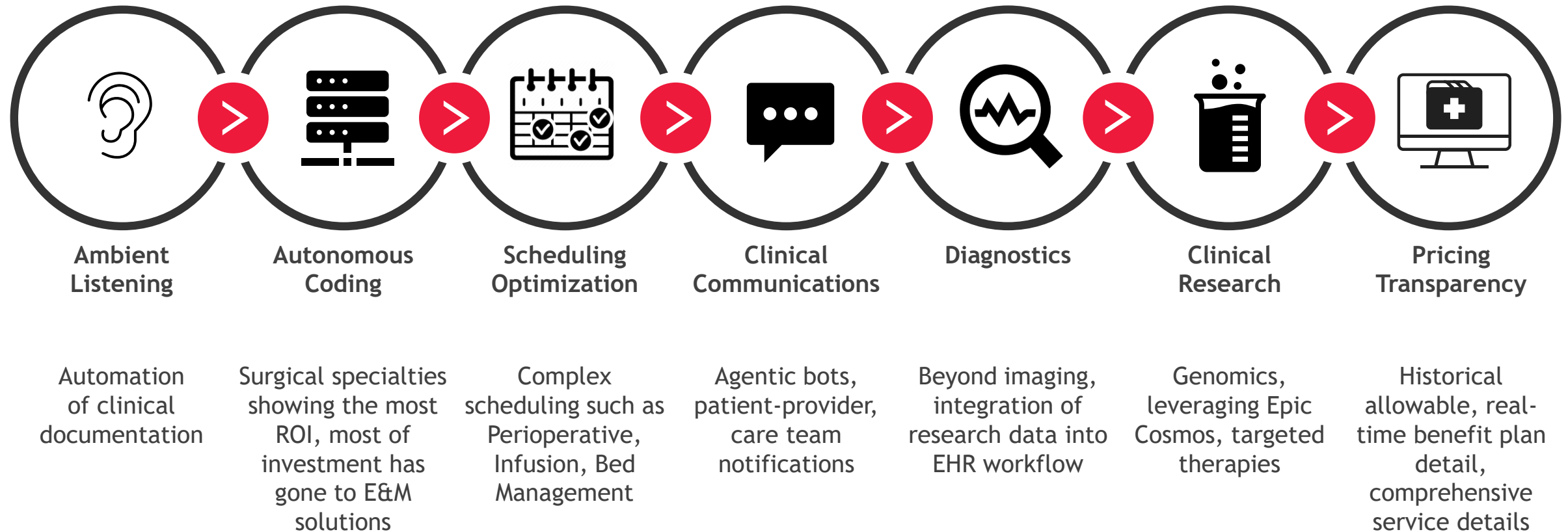
## 2025 Healthcare CFO Survey

Insights into Automation  
& AI within the  
Healthcare Industry



# AI Priorities for Healthcare Organizations

Healthcare organizations are expanding AI investments beyond RCM functions, particularly in the areas of clinical workflow efficiencies and to reduce burdens on clinicians



Source: Multiple sources consolidated by BDO's Market and Buyer Intelligence Team



## BALANCING AI OPPORTUNITIES & RISKS

1. A majority of CFOs highlight the absence of formal strategies, policies, and governance frameworks.

We've restricted access to certain generative AI chatbots due to concerns over data privacy, legal implications, or other risks.

2. Many organizations prefer proprietary solutions over “off-the-shelf” offerings.

We're partnering with external vendors/third parties to build or access generative AI solutions.

3. Components & sequencing of pre-requisites largely not understood.

We have formalized or are in the process of formalizing a policy and/or developing AI governance for generative AI usage.

We're building a proprietary generative AI platform.

We're informally exploring generative AI without a defined strategy.

We're educating and gathering needs from our employees on best use cases.

## Healthcare's Approach to Generative AI



# Automation/AI Market Trends and Key Insights

## MARKET TRENDS


1. Share of companies that are at least experimenting with AI has surged this year to 98% from 47% last year
2. Only 4% of companies adopting AI reap full value from the technology
3. Generative AI has spread across a range of professions since its debut less than two years ago, with 28% of workers now using the technology on the job
4. 22% of organizations that have implemented an AI strategy have begun to yield substantial gains
5. AI leaders expect 60% higher AI-driven revenue growth and 50% more in cost cuts than companies less focused on the technology

Source: Boston Consulting Group

## BDO OBSERVATIONS

1. Most organizations struggle to define AI and applicable use cases that accelerate change
2. Employees are tired of Excel, manual effort and are requiring a different approach to leverage enhanced analytics to analyze data
3. The hardest step is the first step, and most organizations lack an AI strategy that articulates a roadmap forward
4. Organizations need to scale automation for meaningful impact, however, many are still in “tinker” mode
5. Success stories clearly connect an AI strategy to corporate and metrics that matter
6. The war on talent for automation skills is only in the beginning stages





## About BDO USA

At BDO, our purpose is helping people thrive, every day. Together, we are focused on delivering exceptional and sustainable outcomes — for our people, our clients and our communities. Across the U.S., and in over 160 countries through our global organization, BDO professionals provide assurance, tax and advisory services for a diverse range of clients.

BDO is the brand name for the BDO network and for each of the BDO Member Firms. BDO USA, P.C, a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms.

[www.bdo.com](https://www.bdo.com)

Material discussed is meant to provide general information and should not be acted on without professional advice tailored to your needs.

© 2023 BDO USA, P.C. All rights reserved.

