

Setmore

White paper.

How online appointment scheduling became an essential tool for businesses during lockdown

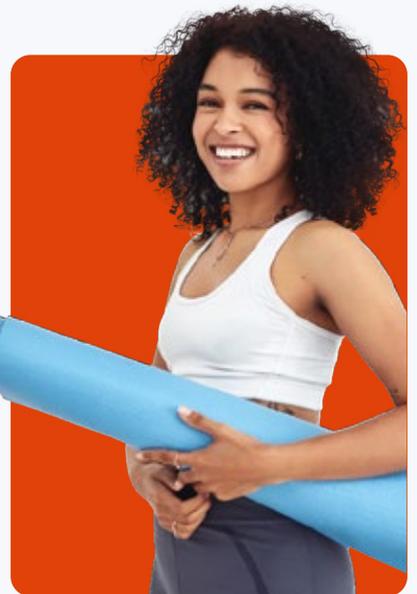
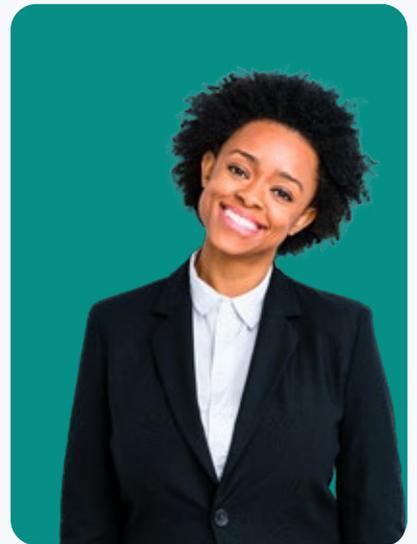
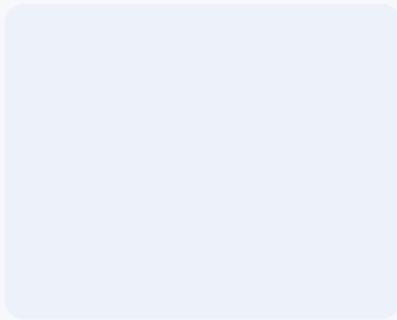
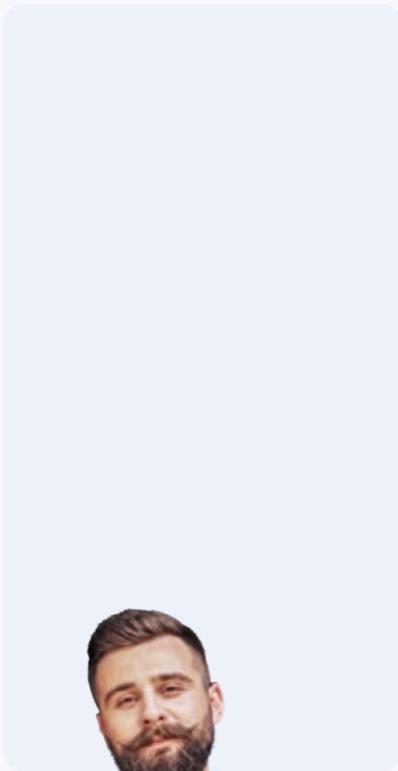


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Executive Summary.

In this white paper, we'll answer:

- What is online appointment scheduling?
- How has the appointment scheduling industry changed since its conception?
- What are the technologies underpinning appointment scheduling?
- What will the future of appointment scheduling look like?

An online appointment scheduling (OAS) platform, otherwise known as **digital calendar**, **appointment scheduler** and **online booking platform**, is a web-based application that enables people to book, reschedule, and cancel appointments through a web interface. Today, **appointment schedulers** appear on websites, social media pages, indeed, any digital platform to which HTML code can be added.

The coronavirus outbreak and subsequent social distancing measures implemented in varying degrees across the world have kickstarted a new interest in their capabilities. Of course, most businesses simply want a solution capable of mimicking the original technology, albeit with added automation.

But the digital counterparts to traditional technologies are also constantly evolving to include new functionalities. Where past technologies operated on a largely horizontal basis, today's solutions are geared to cover multiple verticals. **Personalization**, **accessibility**, and **versatility** are core considerations for any new technology.

Modern customer-facing technology is geared toward the **user experience**. Not only must it offer a reciprocal relationship between provider and consumer, but users also expect the service to be personalized to their unique requirements.

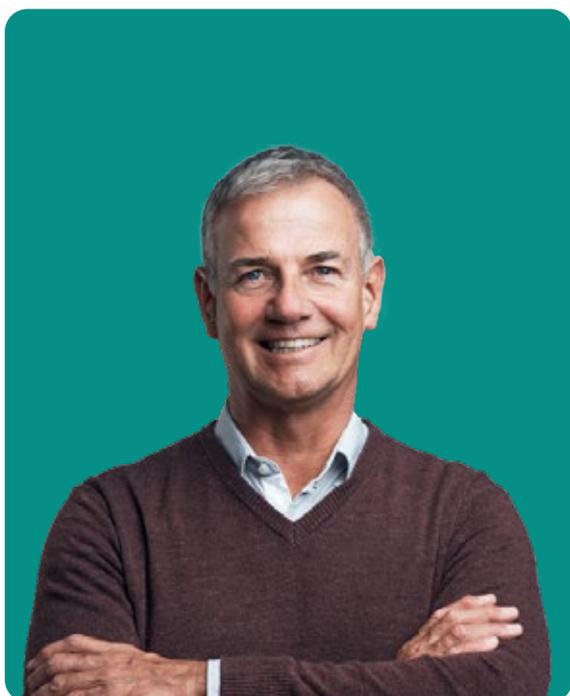
Simultaneously, businesses have always required a means of managing client engagement, intake, and support. Even bricks & mortar businesses operating on a drop-in basis require some means of organising their schedule; be it for suppliers, management or high-ticket clients.



Online appointment scheduling

undoubtedly responds to that need for interaction management. This white paper argues that not only is appointment scheduling a necessity now, it's going to become even more integral to effectively building and growing an efficient, industry-leading business in the post-covid-19 landscape.

As **Bryce Morrow**, CEO of Setmore, said: "There has been a digital transformation in the last six months that would have taken years. Customers now expect businesses across all industries to offer self-service booking software. There are 30 million small businesses in the US alone, and 77% of GDP is from the service sector; the bulk of business can be dramatically improved through scheduling technology. I hope this white paper will help nudge companies to reinvent and adopt modern booking software."



Appointment scheduling: A brief history.

Appointment scheduling has existed for hundreds of years. Since their conception, organizations have needed a way to manage their schedules and designate bookings to customers. Initially, this function was performed by paper calendars and logbooks for companies, and paper diaries for individuals. But physical appointment calendars suffered from the same issues; inefficiency and duplication. Creating multiple copies of an appointment for each party took time. Details could be incorrectly recorded or lost, leading to missed appointments.

Aided by widespread access to the internet, the growth of **digital appointment scheduling** aimed to redress these issues. With an internet connection, customers could contact a business anywhere. However, the evolution of the internet fundamentally changed the relationship between business and customers.

Whereas the earliest iterations of **online appointment scheduling** required both parties to be active at the same time, booking today is largely an asynchronous experience. With effective automation, customers can now book appointments and the booking is automatically added to the business' calendar.

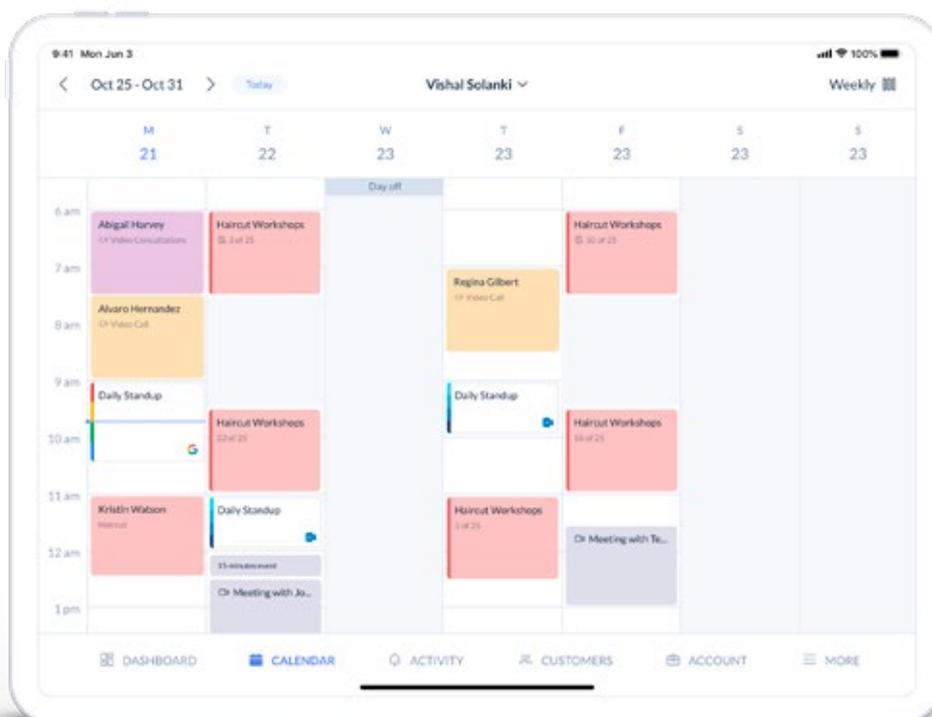
Likewise, the ubiquity of WiFi and data connectivity, combined with the widespread availability of mobile smartphones, has enabled a new level of accessibility for customers and businesses.

Ultimately, the cloud-based digital calendar was born of a very real need to consolidate appointments through one system. As technology developed, businesses looked for ways to centralize their customer engagement

points, including their website, social media platforms, and app, with back-end technologies, including their **sales CRM** and **customer support tools**.

In short, the scope and functionality of **digital booking platforms** have grown exponentially as new technologies opened new avenues for engagement.

As a result, most **booking platforms** in 2020 offer integrations with other platforms. And although these integrations come with their own unique, industry-specific challenges, they will only become more common as businesses seek new ways to connect disparate operating systems.



How does appointment scheduling software work?

Until recently, scheduling appointments was largely a binary experience. An individual would request their appointment, the business or organization would schedule the appointment, and neither would interact beyond that.

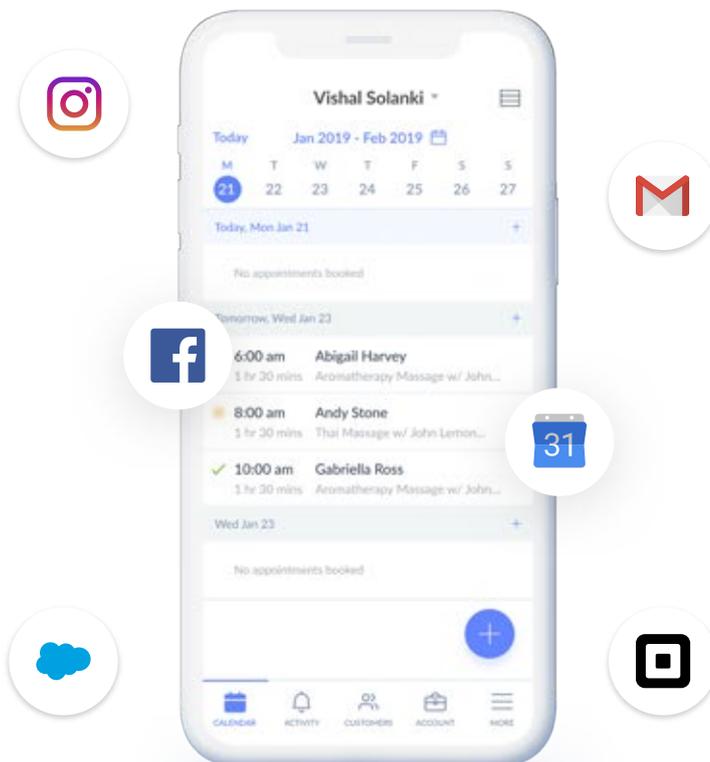
Today, booking an appointment with your doctor, plumber or personal trainer can be as simple as going onto their website, social media platform, or app. Many small businesses even use the **booking platform** itself as an ersatz website. From these platforms, users can select an appointment time. Most **online booking platforms have automated update features**, so users and providers receive a confirmation message via email or SMS upon the point of booking.

One of the biggest advantages of a **digital booking calendar** is the added time gained from automating the scheduling process. Whereas a linear, analog booking platform requires the constant availability of a support team¹, an online calendar allows the customer to book as and when they like. As Morrow says, "Scheduling appointments manually requires effort, access and time. In 2020, those resources are becoming more and more scarce. For every second spent manually entering appointments - whether into a logbook, diary, or CRM - that organisation is **losing out on a resource** that could be used more effectively elsewhere."

The time saved by offering a **self-service appointment scheduler** also extends to additional admin processes.

In the healthcare industry, for instance, assigning digital notes to customer bookings minimizes referral inefficiencies and enables a more efficient flow of information between different departments.² Studies have shown healthcare providers' can save up to **10 hours per week** by switching to online scheduling over manual appointment platforms.³

The addition of an **appointment scheduler** can have a significant impact on the **operational efficiency** of organizations across industries. This white paper shows just how essential that will be to businesses in the post-covid-19 landscape.



Appointment scheduling with Setmore.

About Setmore

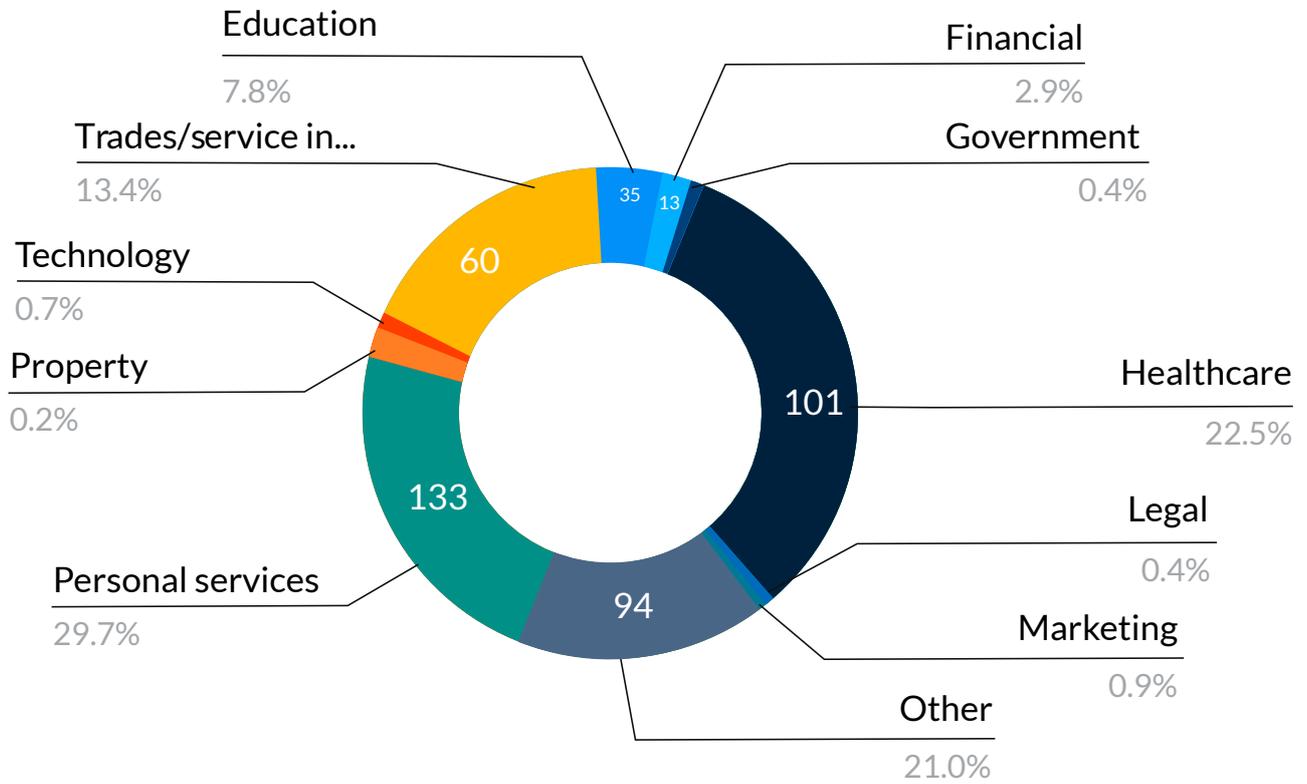
Setmore was founded in 2011 by **AnywhereWorks**, a distributed working company with offices based in Portland, USA; Edinburgh, Scotland; and Chennai, India. The company was born of frustration at the other appointment scheduling services available online.

Setmore has also had to adapt significantly to the outbreak of the coronavirus and subsequent lockdown measures.

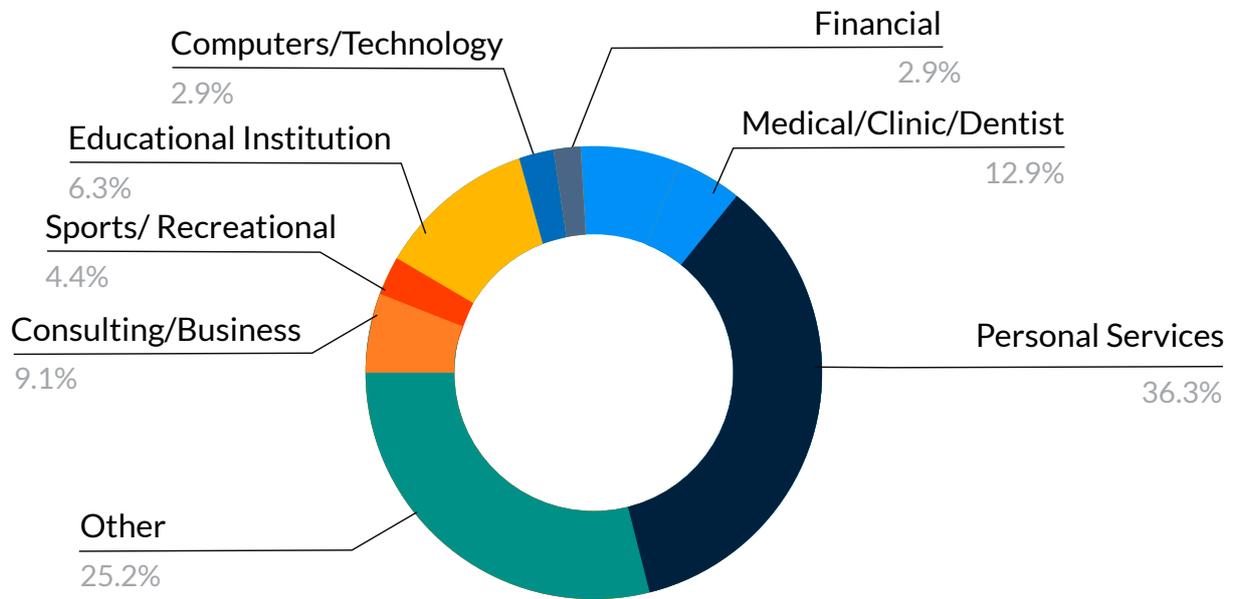
As part of this white paper, Setmore conducted a survey with over 400 of its Premium plan customers. The statistics included in this white paper are the result of collating those responses, coupled with additional external research.

The **distribution of industries** within the Setmore white paper survey broadly lines up with the **overall distribution of industries** in Setmore's customer base.

Setmore Survey Respondents By Industry



Setmore's overall customer base distribution

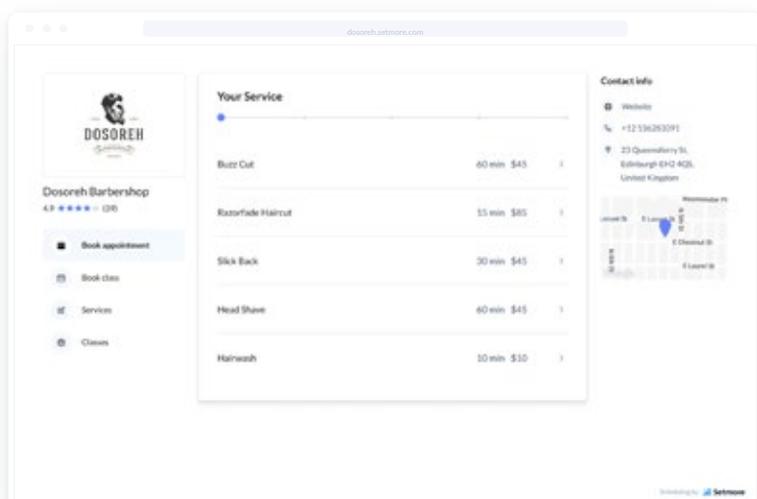


Benefits of online appointment scheduling.

The modern, online appointment scheduler offers a host of advantages over its analog ancestor. While each industry comes with its own unique requirements, there are several **benefits** that broadly apply to every sector.

The contemporary **digital calendar** offers:

- **Improved efficiency** - Businesses that enable their customers to book their own appointments see an uptick in efficiency. With customers choosing their own booking times via a website, social media page, or app, employees can dedicate their time to managing other aspects of the business.
- **Personalization** - The modern online appointment scheduler, in which customers can choose their own appointments and request customized services, responds to the need for more personalized user-centered support.



- **Reduced no-shows** - With self-servicing web-based appointments, research has shown the added responsibility increases the likelihood the booker will remember to attend.² Coupled with SMS and email reminders, online calendars lead to a significantly lower rate of missed appointments.⁴
- **More candid responses** - People tend to feel more comfortable revealing sensitive information through a secure portal than over the phone. This is particularly beneficial for healthcare and legal organizations.⁵
- **Reduced waiting times** - When booking appointments online, people are more likely to attend at the right time. There is some contention as to why this is, but several sources have suggested that the act of choosing their own appointment slot increases the likelihood people will attend on time.
- **Increased sales:** According to a First Insight Report, 71% of shoppers spend \$50 or more when shopping in-store, signaling that consumers purchase significantly more per visit in-store than online.⁶ And, according to JRNI's Consumer Behavior Research, 64% of respondents said they typically spend or invest more in products or services after in-person appointments.⁷

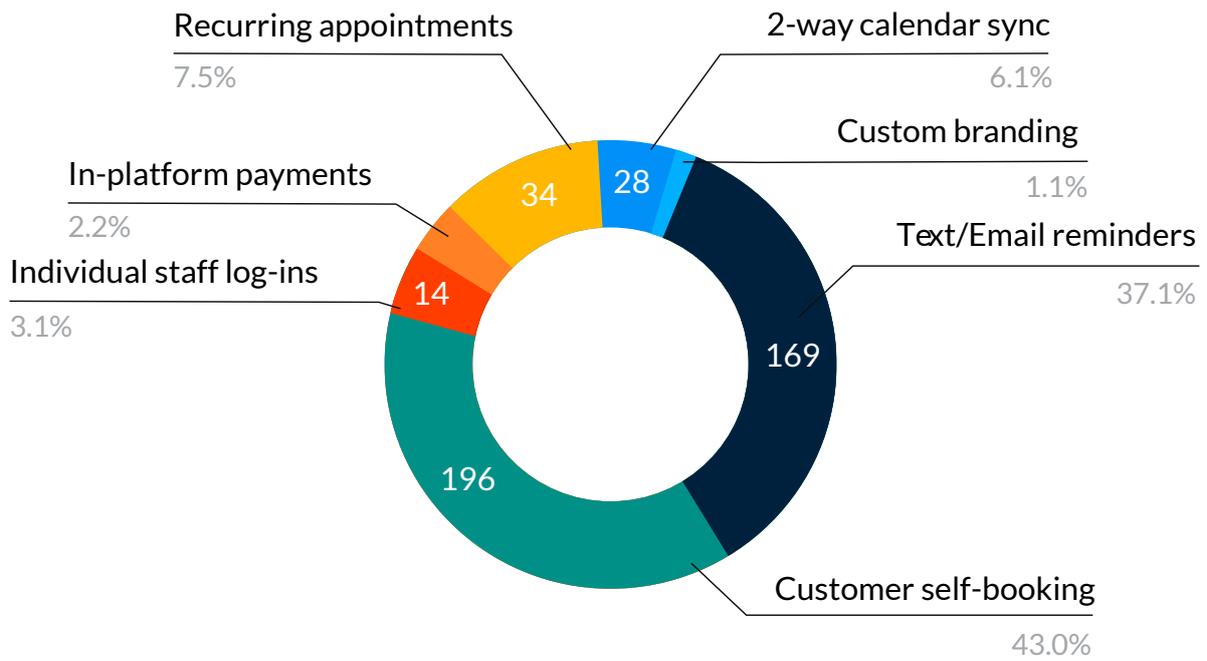


Key stats.

- The **global appointment scheduling software** market garnered USD 205.85 million in 2018. That number is expected to reach USD 360 million by 2024 and USD 546.31 million by 2026 - a CAGR of 13.1% from 2019 to 2026.⁸
- 35% of clients prefer scheduling appointments during non-business hours, and 40% of **online bookings** actually happen after hours.^{9 10}
- The US represents 40% of the total **appointment scheduling** market.¹¹
- USD 3.2 billion – the estimated value savings from using **online appointment scheduling**.¹²
- 29% – the percentage of reduction in no-shows with automated reminders.¹³
- 53% of all **online bookings** are made by staff.¹³
- Sundays from 4:00 to 8:00 PM is the most popular day and time to book appointments.¹³

Appointment booking software technology.

What's the most important feature for an appointment booking platform?

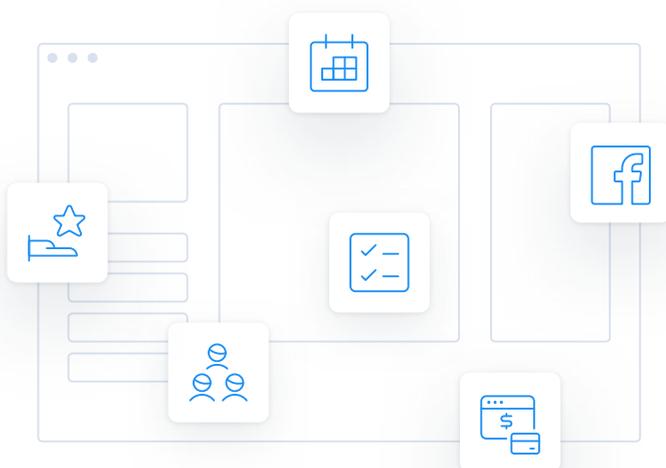


Customer self-booking.

Self-booking is a key element of **appointment scheduling**. By enabling customers to access a public-facing schedule, businesses streamline their own **operational processes** while enabling customers to choose a time that best suits their own schedule. In the Setmore survey, **43% of respondents** rated self-scheduling as the most important feature of their appointment scheduling platform.

For healthcare providers, the benefits of self-scheduling go beyond merely reducing administrative input.

When allowed to **self-schedule**, MedHost argues in their report '6 Ways Online Appointment Scheduling Benefits Community Hospitals', patients can be more forthcoming, as they feel more comfortable disclosing sensitive medical information via a **secure calendar system** as opposed to over the phone.² This has the dual benefit of **streamlining the patient review process** and **increasing patient satisfaction**.

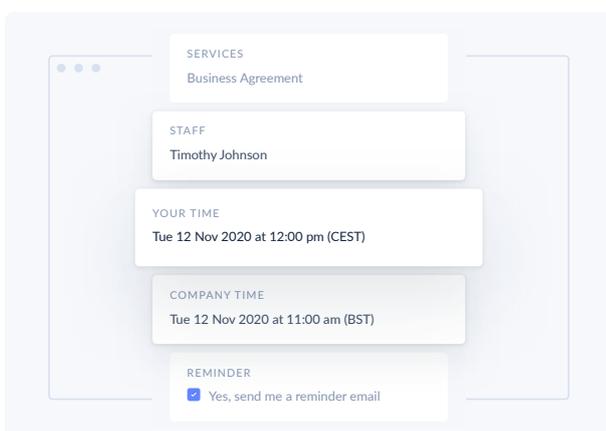


Likewise, personal services respondents also rated **customer self-booking** as the most important feature of an **appointment scheduling service** (at **46.62%**)

Self-booking also enables customers to book outside of business hours.

With no need for **two-way interaction**, customers are able to **schedule appointments** under their own volition. Customer support staff can then confirm the appointment when they're available. This is a key reason for the **increase in automation** on appointment platforms. Appointment cards can be sent to both parties via email, text, or through the **appointment booking app**. Confirmation of the appointment usually triggers another automated interaction.

As a time-saving device, **self-booking** represents the most direct value. Customer empowerment reflects employee empowerment. When both parties can make their choice without waiting for input from the other party, operations become simpler. This is particularly vital in industries such as healthcare, where the average time for a patient to **schedule an appointment** by phone is **8.1 minutes**.

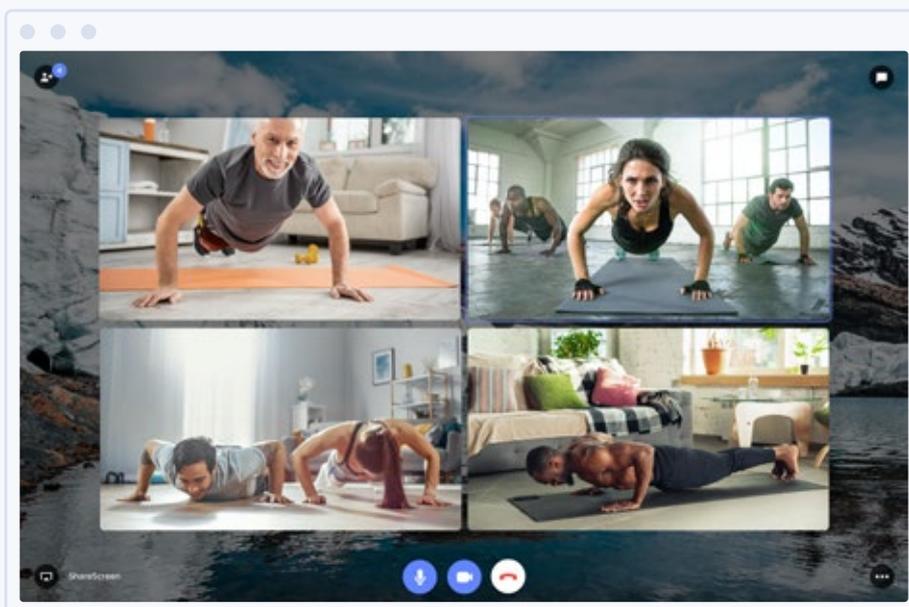


The image shows a screenshot of a digital appointment scheduling interface. It consists of several stacked white boxes with rounded corners, set against a light blue background. The first box is labeled 'SERVICES' and contains the text 'Business Agreement'. The second box is labeled 'STAFF' and contains the name 'Timothy Johnson'. The third box is labeled 'YOUR TIME' and shows the date and time 'Tue 12 Nov 2020 at 12:00 pm (CEST)'. The fourth box is labeled 'COMPANY TIME' and shows 'Tue 12 Nov 2020 at 11:00 am (BST)'. The fifth and final box is labeled 'REMINDER' and contains a checked checkbox followed by the text 'Yes, send me a reminder email'.

Video appointments.

Video appointments, in which booking notifications or confirmation receipts are accompanied by a link to a video conferencing platform, are becoming increasingly common.

This is partly as a result of lockdown measures, instituted in the wake of the coronavirus pandemic. With healthcare practices unable to provide **in-person consultations**, requests for **video-conferencing integrations** on Setmore increased by 80% between January and June 2020. Likewise, industries including legal, consulting, and tutoring/mentorship have increasingly opted for **video-conferencing integrations** with their **appointment scheduling platform**.



In the month following the introduction of Setmore's **Zoom video-call integration** (July 2020), the number of calls increased by **660.83%**. The number of video-calls placed through Teleport.video in its first month increased by **683.33%**. Between its introduction in January 2020 to July 2020, **video-calls** via Setmore increased by over **887%**.

This increase also marks part of a larger general shift to virtual meetings, with the global **video conferencing** market size expected to register a CAGR of **9.9%** from 2020 to 2027 as organizations seek to **minimize in-person interactions** and **reduce appointment friction**.¹⁴



In fact, **27.5%** of Setmore customers surveyed said they had introduced **online video appointments** in direct response to social distancing measures.

The popularity of **video-appointments** is growing rapidly across industries, but - excluding healthcare - it's the property and real estate industry that has seen the most fervent adoption of this technology.

Even prior to coronavirus and lockdown measures, property companies had begun to utilize **video-tours** for prospective buyers. '**Virtual live tours**' have become a common staple for larger real estate and property management companies.

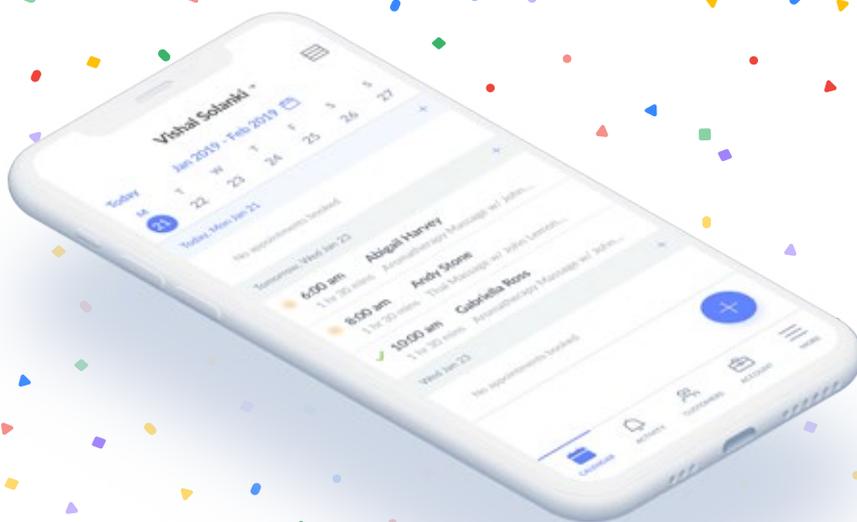
In a 2019 report by the **National Association of Realtors** entitled, "Home Buyer and Seller Generational Trends", **48%** of buyers ages 39 to 63 said they found virtual tours a "very useful" tool in their search.¹⁵

Over **10.5%** of property management accounts have chosen to add either a **Teleport.video** or **Zoom** integration to their appointment scheduling since their introduction in February and June 2020 respectively. Those integrations represent **1.17%** of the total number of integrations. At **0.91%** of the total Setmore customer user base, they're slightly overrepresented in this technology.

Mobile.

The vast majority of Americans – **96%** – now own a cellphone of some kind.¹⁶ The share of Americans that own smartphones is now **81%**, up from just **35%** in Pew Research Center’s first survey of smartphone ownership conducted in 2011.¹⁶

Today roughly **one-in-five** American adults are “smartphone-only” internet users. The trend isn’t limited to millennials, who are traditionally the most mobile-dependent group. **42%** of adults aged 65 and over now own smartphones, up from just **18%** in 2013.



52% of all internet traffic now comes from mobile, with desktop usage declining YoY, according to a study by Stat Counter.¹⁷

This reflects a growing mobile-literacy amongst all generations, itself driven by an increasing focus on making their digital platforms more mobile-friendly

Statistics regarding the ratio of desktop to mobile bookings vary, with some saying mobile usage is as high as **76%**.¹³ Despite this, there was no notable change between the proportion of appointments booked through mobile in January 2020 (**20.76%** by iOS and **7.85%** by Android) compared to in June 2020 (**23.17%** iOS and **10.39%** Android).

The initial expectation of a significant drop-off in mobile bookings did not come to pass. This could be down to the majority of mobile bookings coming from the 'mobile-only' generation. It could also signal a narrowing of the multi-device booking journey. This reflects a growing mobile-literacy amongst all generations, itself driven by an increasing focus on making their digital platforms more mobile-friendly.



Browser access

According to a 2020 study by Statcounter, **50.48%** of traffic is mobile and **46.51%** is desktop, and **40%** of people in the US search only on a smartphone.¹⁷ The number of Setmore users who access the platform through a mobile browser increased by **160%** between April to August 2020. With fewer customers booking appointments in this time, this increase is most likely as a result of more members of staff seeking access to the company booking platform.

Bookings through the mobile app were popular among the legal industry, with **17%** of Setmore legal customers using the mobile app or accessing their appointment schedule via a mobile web browser between July 2019 and July 2020.

However, it's the personal service industry that has been the most receptive to mobile browser access, with **70%** of salon and spa appointments being booked through mobile devices.

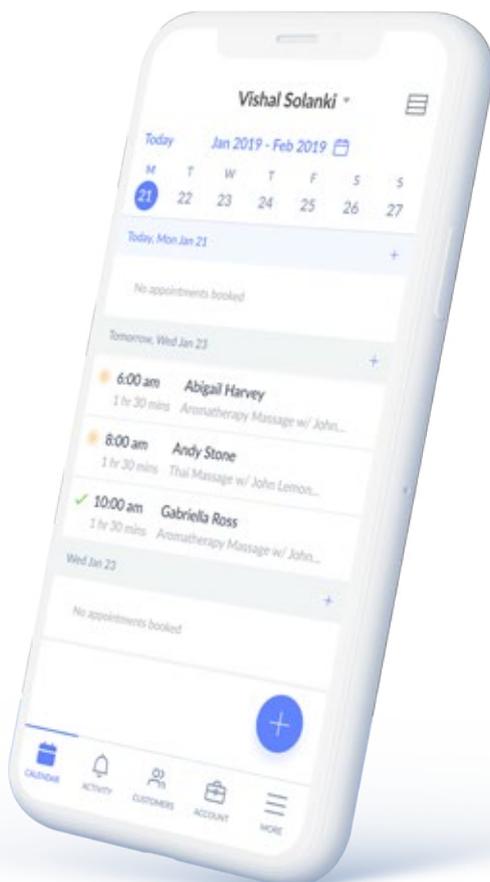


Mobile app

The Setmore app has been downloaded over **550,000 times** (via both iOS & Android) since its launch in 2013. The personal-service sector has been the most enthusiastic adapter of the Setmore mobile app, representing **22.56%** of total sign-ups across industries. However, as the personal services industry represents **34.62%** of the total Setmore customer base, they're still underrepresented in this field.

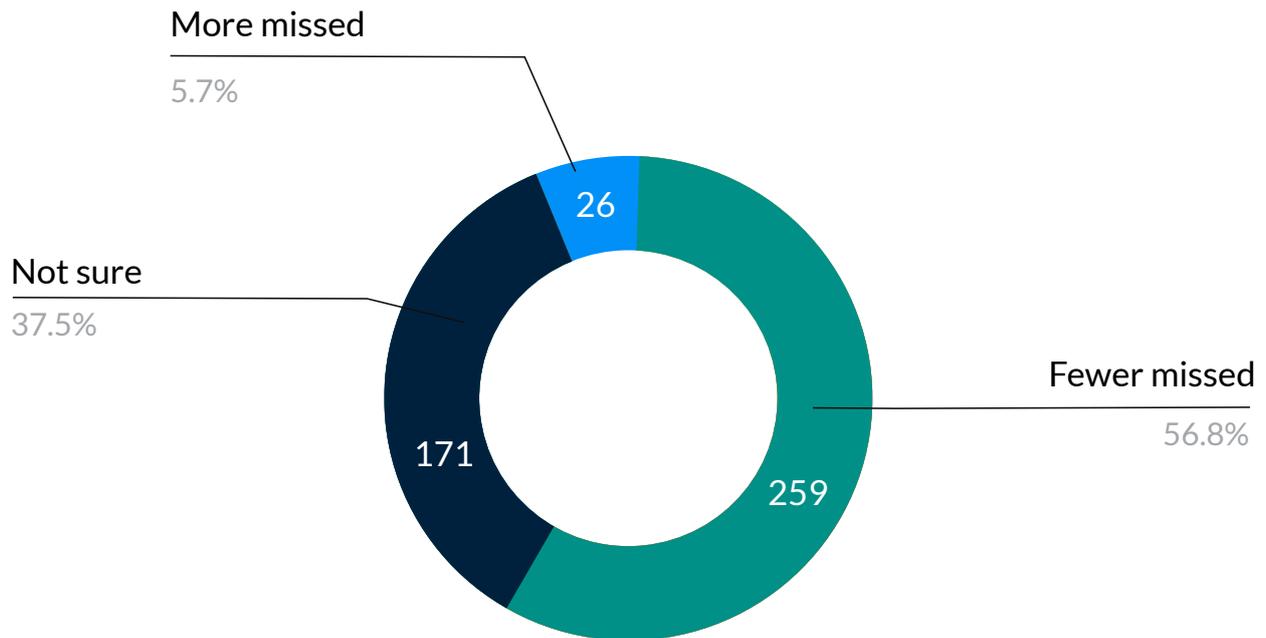
However, the onset of lockdown restrictions in response to the covid-19 outbreak has led to a significant reduction in the number of appointments made. Bookings made through the Setmore app decreased by **78.54%** from January 2020 to June 2020.

The most likely reason for the levels of mobile bookings remaining relatively steady; people had more access to their home devices (including desktop, laptops, and tablets), and so didn't need to resort to mobile for bookings.



Appointment reminders.

Did you notice a change to the number of missed appointments after introducing Setmore, or in how people attended appointments?



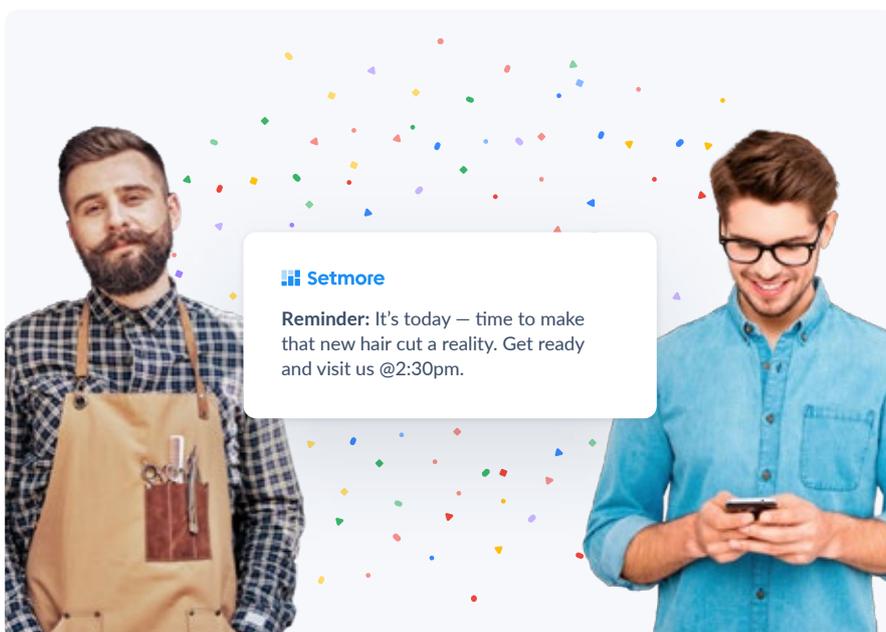
Although a relatively new technology, **appointment reminders** are a popular tool for businesses aiming to reduce the number of missed appointments. **36.9%** of Setmore customers rated **appointment reminders** as the most important feature for their **appointment scheduler**.

The value is backed up by the numbers: **56.8%** of survey respondents noted a reduction in the number of missed appointments after introducing **appointment reminders**.

Numbers vary from study to study, but a study by the Pan African Medical Journal entitled, 'The effect of patient reminders in reducing missed appointment in medical settings: a systematic review' noted: "95% of studies reviewed reported a positive effect of patient reminders on appointment rates, with an average of 41% reduction in missed appointment rates and 34% increase in clinic attendance rates in all the studies."

A study on the effectiveness of **SMS appointment reminders** by the American Congress of Rehabilitation Medicine found that no-shows decreased by **39%** when facilities sent out **text reminders**.¹⁸

Automated appointment reminders have become a common feature for most **appointment scheduling platforms** in 2020.



The pandemic and resulting lockdown measures have accelerated the adoption of this feature. The number of **appointment reminders** sent through Setmore saw a **16.08%** increase between January 2020 to August 2020.

This increase can be, at least partly, put down to an increased urgency for businesses to maximize completed appointments and maintain a more rigid schedule. That aligns with the **63%** of survey respondents who began to direct customers to book directly through Setmore.

Of all the industries, it's healthcare providers who have benefited most from the introduction of personal reminders for patients. **Automated SMS and email reminders** have shown to significantly limit the number of missed appointments; a major issue for healthcare providers, costing the US Healthcare industry **\$150bn a year**.¹⁹

The Dartmouth-Hitchcock Medical Center in New Hampshire reduced no-shows by **40%** after implementing an asynchronous clinical messaging service that allows patients to **request, review, reschedule, and cancel** appointments. Likewise, a study by the American Congress of Rehabilitation Medicine saw no-shows decrease by a massive **39%** when facilities sent out **text reminders**.¹⁸

Online Payments.

Online payments via **integrated payment platforms** mark a further move to streamline the payment process. The added convenience serves certain industries better than others. Law firms, for instance, get paid **39%** faster when they accept online payments.²⁰ And as **71%** of lawyers say they consider revenue their most important indicator for law firm growth, integrated payments will likely become a common feature as **online booking** becomes the norm.



Square

Get paid for your services from
Anywhere, with Square.



Stripe

Collect debit or credit card payments on
booking, easily.

42% of Setmore customers have integrated their appointment calendar with payment platforms **Stripe** and **Square** since the integrations were made available in July 2017 and November 2019 respectively.

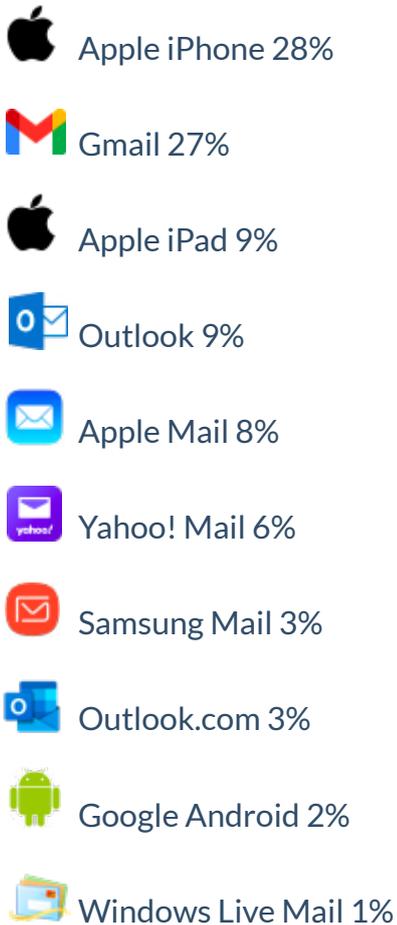
And while this number represents part of a wider push to centralize various customer touch points, the covid-19 pandemic undoubtedly made online payments a more attractive feature.

With payments handled digitally - either in advance or following appointments - both customers and business owners can minimize time spent in close contact. In fact, **17%** of Setmore users said they plan to integrate online payments into their calendar in the next 12 months. That number rises to **50%** for marketers. **6%** of all respondents planning to add online payments said the move was in direct response to social distancing measures.



Email Sync.

Email client usage worldwide²¹



Email and calendar synchronization, in which new appointments automatically generate emails that are then sent to the email addresses of the **appointment scheduler** and the appointment host, is a relatively new technology.

With **email sync**, the customer provides an email in their booking, and both parties then receive an email notification alerting them to the new appointment. **Email sync** creates an extra channel of communication between the two parties.

Email sync has the added benefit of providing an additional reference point for staff and customers, allowing them to see details in advance of the appointment.

For those who don't use the booking platform regularly and require access to a browser to access their calendar, email sync offers a shortcut to their appointment details.

And while it may not be seen as the most significant advantage to online appointment scheduling - just **6%** of Setmore customers rated email sync as the most important feature for their appointment scheduler - it's undoubtedly an essential feature for a modern booking platform.

Due to its ubiquity within the appointment scheduling community, the impact of covid-19 on the number of email sync requests was negligible.

Buffer times.

Buffer times - time-slots set between appointments - have become an increasingly utilized feature in Setmore. In total, **55.92%** of Setmore accounts now include buffer times in their appointments.

27.46% of survey respondents said they planned to add **buffer times** between appointments as a result of social distancing requirements.

The increase was undoubtedly born of necessity. Bricks & mortar spaces for personal service providers like salons, barbers, and spas, require staff to observe social distancing and sanitation measures. **45%** of personal service providers said they have introduced **buffer times** between appointments to maintain social distancing.

Despite this, only **36%** of personal service businesses said they plan to limit the amount of staff or customers on their schedule as a result of social distancing measures. That suggests, while people are willing to take the necessary precautions to operate safely, they don't anticipate a need to restrict the flow of clients. Whether that's due to skepticism that they'll receive enough bookings to warrant adjustment, or because they rarely reached capacity even prior to the covid pandemic, isn't clear. Additionally, this could be a reflection that these businesses have already adjusted their schedule to take into account an increase in appointments.



Organizations within the healthcare industry, on the other hand - already the most stringently controlled for hygiene measures - are now adding **additional time** between appointments to account for decontamination of work surfaces.

With no clear end to these new hygiene restrictions in sight, **buffer times** will most likely become a common feature in **appointment scheduling** for key industries - particularly healthcare and personal service providers.



Third-Party Integrations.

Like other supporting sales and CRM tools, **integrations between different websites and appointment scheduling platforms** is now an essential feature.

In 2020 - where users typically expect to be able to find any information with no more than three clicks of searching - businesses recognize that the integration of a **digital calendar** to their platform is crucial to gain as many appointments as possible.²²



Salesforce

Add contacts from Setmore to your Salesforce onboarding campaigns.



Hubspot

Export your Setmore contacts into your segmented Hubspot campaign lists.



Zoho CRM

Update your Zoho CRM contact list with your latest Setmore customer details.



Freshsales

Send customer contact information from Setmore to your Freshsales client list.

Adding a **booking feature** to a **social media platform**, for instance, is essential to reducing the number of steps required between a cold lead seeing a post from your company for the first time, to becoming a customer.

The growing importance of integrations also reflects a more pluralistic approach to software development. Developers recognise that compatibility is crucial to functionality. By enabling customers to **integrate their software** with that of another third party, they increase their own platform's usability and improve the overall user experience.

This also points to an increased awareness on the part of the business that customers - when given the option - will access their content via a number of platforms. Most businesses have a social media presence, and a growing number now also have their own website. The integration of an **appointment scheduling system** into both of these enables customers to book through the platform that suits them.



Instagram booking

Let customers book appointments from your latest posts on Instagram.



Obstacles to widespread adoption of online appointment scheduling.

The widespread use of online appointment scheduling faces a number of challenges. These include:

Lack of digital infrastructure

There is widespread inequality in access to **fast and secure internet connection** across regions, countries and even cities. In wealthy countries, more than **85%** of the population has access to the internet, whereas the average for developing countries is **43%**.²³

Even in the United States, there are regions with little to no internet access.

Research by MLab - an open-source project that monitors global internet performance - found that even by late March of 2020, most people in **62%** of counties across the US did not have the government's minimum download speed for broadband internet.²⁴

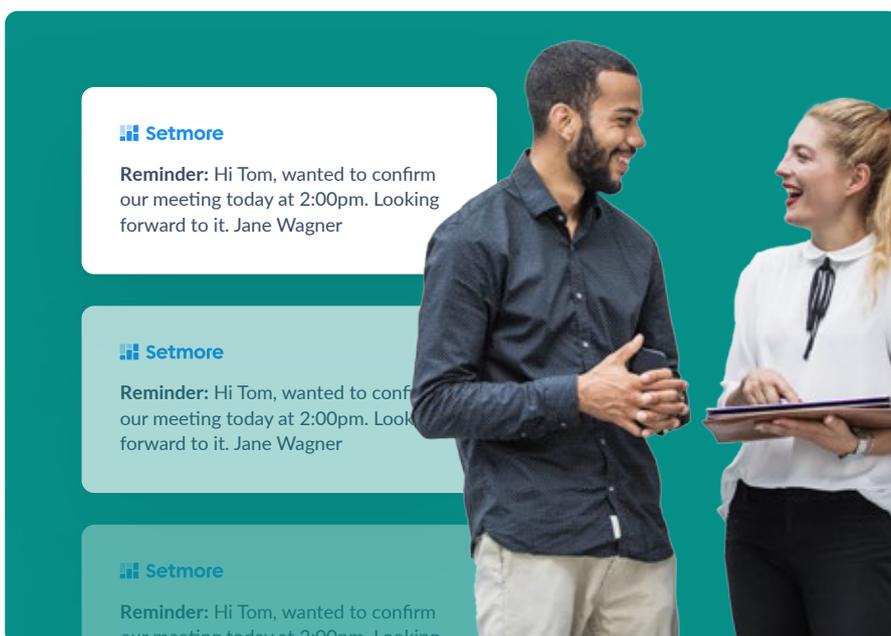
Between February and mid-March, as the pandemic swept across the US, there was a **10%** increase in how many counties saw download speeds fall below the government standard, representing about one in 10 US counties, according to findings by M-Lab.

However, this trend is changing as countries invest heavily in new, faster and more versatile lines for broadband access. By 2025, the total installed base of Internet of Things (IoT) connected devices is estimated to reach **75.44 billion** worldwide, a **fivefold** increase in **ten years**.²⁵

Research notes the introduction of next generation mobile connection technology 5G - forecasted to reach **1.3 billion** subscriptions by 2023 - as a major boost for the application of IoT in everyday life.²⁵

For online appointment scheduling to become widespread - and to truly replace other means of scheduling appointments - countries will need to invest far more in developing and enabling widespread internet access.

In time, this obstacle will become less significant. As digital infrastructure in rural areas improves, lack of access to a secure internet connection will become less common. Many countries, including the United States, are already taking steps to close the gap between urban, suburban and rural digital infrastructure.



Lack of technical literacy

A lack of digital literacy - defined by Law et al. (2018) as: “the ability to access, manage, understand, integrate, communicate, evaluate and create information safely and appropriately through digital technologies,” - represents a major barrier to the widespread adoption of online appointment scheduling.

Technical capability is lowest in older age groups. In 2018, more than **35%** of those aged between 65 and 74 had never used the Internet; the highest ratio of all age groups.²⁶

Research conducted by the Pew Research Center conducted in early 2019 revealed that while **93%** of Millennials own smartphones, just 53% of those 65 and over own a smartphone. That number falls to just **40%** for people aged 74 to 91.²⁷



However, as digital technologies become more widely available and demographics change, lack of digital literacy will become less significant an issue. In the US, the percentage of adults aged 65 and older who now report owning smartphones increased from 18% in 2013 to **42%** in 2017. Likewise, access to home internet among people 65+ has grown from just **14%** in the early 2000's to **73%** in 2019.²⁸

Manual integration with legacy systems

One of the most significant barriers to integrating new scheduling systems is managing implementation without disrupting the existing system. As users transition to digital appointment taking, organizations must phase out the legacy systems on which they previously relied and fundamentally alter their established workflow and administration processes.

To this end, many organisations choose to incorporate their new **appointment systems** in a staggered process. That provides a fallback for employees and customers to revert to manual processes until the new system is completely operational. In the medical industry, for instance, many practices take a piecemeal approach to **appointment booking integration**. Healthcare clinic admins can take appointments by phone, email and in-person, but also guide patients to book through the new system. The process enables for gradual phase-out of other appointment channels, however, it does present its own unique challenges, including how to securely track and store client data.

The medical industry, which represents approx **28%** of the total appointment scheduling industry, is perhaps the most at risk here. Often operating 24 hours a day, seven days a week, the introduction of a new system could put lives at risk if not managed properly. Many healthcare organizations have maintained two systems - legacy and digital - in parallel.²⁹ As a result, the transition has been slow and, at times, highly inefficient.³⁰

However, this is changing. According to a study conducted by Google and Compete (a research vendor) in 2012, only **21%** of patients booked appointments via computer or mobile devices.³¹ That climbed to **30%** in the United States. However, by 2018, that number had risen to 58% in the US, and is anticipated to hit **72%** by 2024.^{32 33} That's hardly surprising, as **68%** of patients say they're more likely to choose medical providers that offer the ability to book, change and cancel appointments online.³⁴



Security concerns

The security of client information, particularly in industries that handle sensitive data, represents a central challenge to widespread adoption of digital appointment scheduling.

Nowhere are these security concerns more apparent than in the healthcare industry. While scheduling applications have enabled healthcare providers to be more agile and efficient, they also expose providers to additional security risks.

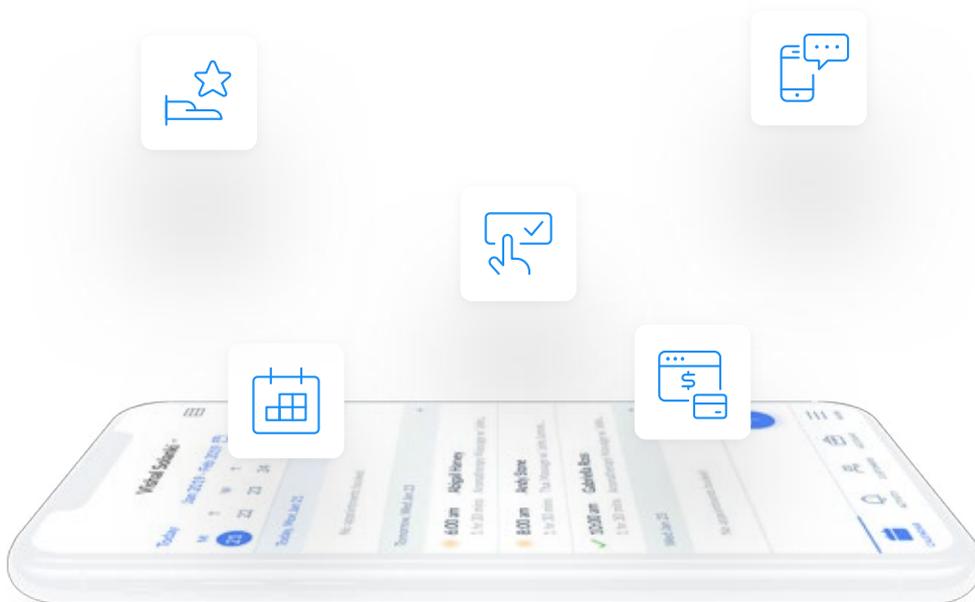
Securing **protected health information (PHI)** is of the utmost importance. As a result, electronic health records (EHR) have some of the strictest data security requirements of any industry. Thus, the integration of scheduling software requires various additional safeguards.

In the US, the 1996 Health Insurance Portability and Accountability Act (HIPAA) sets a legal requirement for sensitive patient data protection.

Companies that deal with PHI must enforce various physical, network, and process security measures to ensure HIPAA Compliance and provide quality patient care.

In the US, organizations must sign a **Business Associate Agreement (BAA)** to consent to an external firm handling patient data. While this ensures any and all information remains secure, it represents just one of several potential access points.

This poses a significant challenge when firms seek to integrate additional platforms. In essence, US healthcare providers must sign BAA's with any third party software provider who could potentially access **patient information**.



As medical appointment scheduling becomes more widespread, **booking platforms** will need to consider how their software can provide **secure** access to patients and healthcare providers without the need for multiple external contracts.

Much like the healthcare sector, the legal industry is subject to a significant number of data privacy restrictions. From criminal to family to corporate law, legal professionals must navigate a wealth of regulations every time they interact with a client.

That means any point of communication between the legal firm and client must be secure, private, and confidential. In Europe, **GDPR** rules require organizations to make clear exactly how a client's data will be used. For digital booking platforms, where people may be required to submit personal information upon scheduling an appointment, the need to ensure the safety and security of the client is paramount.

As Orlagh Kelly, a barrister and consultant specializing in GDPR, argued in a recent Law Firm Ambition article on GDPR and law firms, "'Sensitive' data needs to be protected with particular care. All law firms have employment records and those who practice employment law will have sensitive data in their case files: medical records and information that relates to ethnic and religious backgrounds, political affiliations, and sexual orientation."³⁵

Impact of Covid-19 and lockdown.

While many people still believe business will return to normal following the loosening of social isolation measures, that seems highly unlikely. Businesses will need to take a pragmatic approach to adjust to whatever 'new normal' emerges in the wake of covid-19.

While it's impossible to state the lasting impact of the covid-19 pandemic, it's clear the subsequent **social isolation measures** have forced businesses to reconsider elements of their customer interactions.

Any technology that **minimizes contact** between staff and customers will likely become more popular as long as people are required to social distance. Integrations like secure payments and in-app video-consultations are already seeing increased usage.



Recurring Appointments



Class Booking



Automatic Confirmations



Email Reminders

That could in large explain why Setmore experienced its highest rate of downloads for the Setmore mobile app in June 2020.

Likewise, the number of bookings made through Setmore, although decreasing initially, increased as social distancing measures were eased in various countries.

In all, personal services were the worst hit by the covid-19 pandemic. They represented **29.09%** of the total number of Setmore customers forced to **downgrade** their account between March and September 2020.

Educational establishments were also particularly hard hit by the covid-19 pandemic, accounting for **8.01%** of the total downgrades between March and September 2020.

In the wake of lockdown measures as a result of covid-19, educational institutions have been forced to adapt their processes. Appointments made by or for educational institutions saw a **57%** increase between January and Sep 2020. Likewise, the number of Setmore accounts among educational institutions increased by **66%** in the same period.

The number of classes booked through Setmore **almost doubled** between March and July 2020.



This shift to remote classes - necessary for social distancing - looks to be temporary. However, that doesn't include individuals involved in education. Personal tutors, mentors and online trainers may retain video-calling services. The reasons for continuing to offer video-calls through their appointments are twofold:

- The ability to limit their own travel time while continuing to serve as many students as possible.
- The ability to reach a larger field of students without additional cost.

The lockdown also had an impact of the number of users with **individual accounts**. With Setmore Premium, organisations can give multiple individual employees access to their appointment platform. In fact, June 2020 saw a **177.10% increase** in the number of **individual logins** on the previous month. This is most likely due to employees working from their respective homes requiring access as businesses open up again.



Response to Covid-19.

The outbreak of covid-19 disrupted every aspect of life. Education, travel, healthcare, socialization and, of course, business. Society has undergone a massive transition, and businesses have been at the forefront of that change.

From giant tech companies to small bricks & mortar businesses, the pandemic and subsequent lockdown measures have forced businesses to reconsider how, when, and where they operate and engage with customers.

All of this will have a profound impact on the future of business. Some changes, including restricted access to physical spaces, may be temporary. Others, like the shift to working from home for office workers, could well be permanent. As industries adapt to the 'new normal', they are increasingly turning to technology.

Setmore witnessed the change to working practices in real-time. Of the almost **400 companies** who took part in the Setmore survey, **28.3%** had begun using the **scheduling platform** as a direct result of the coronavirus and subsequent lockdown measures.

Of course, the changes manifested in the usage of Setmore's services represent just a small part of the massive transition across business practices. But the data gathered by Setmore offers a fairly typical insight into the concerns - and responses - of ordinary businesses.

A key trend discussed in this white paper is the shift to digitizing customer touchpoints. Bryce Morrow said, "There will be a continual reduction in the friction to seamlessly book appointments. Imagine a future where your availability is matched with a business or colleague instantly. Imagine seamless workflows for pre and post-meeting."

Video-conferencing will not replace all forms of customer interaction, but it will come to play a more prominent role in the customer engagement process in future.

The data suggests this trend was already on a significant rise even prior to lockdown.



As Morrow explained, “The ability for our clients to work anywhere is front and center for us. We’ve launched video integrations with **Teleport.video** and **Zoom** and rolled out our **HIPAA compliant Setmore Health solution** to empower **telemedicine** and **better healthcare experiences.**”



Business attitudes to lockdown and social distancing

The additional challenges of maintaining social distancing have had a significant impact on the attitudes of different industries to business growth.

Personal service providers, for instance, are less optimistic about increasing their client intake in the next 12 months. Of the **31%** of respondents who said they didn't anticipate an increase in bookings in the next year, the personal services industry represented over a third of that total.

Similarly, the outlook among technology providers is less than positive. **66%** of technology providers don't anticipate an increase in bookings in the next year.

A Reuters poll of more than 100 property market experts found that "More than **80%** of [the] respondents said the recovery to pre-COVID-19 levels would be "gradual," or "slow and long."³⁶ Despite this, **100%** of Setmore real estate customers said they anticipate an increase in bookings in the next year.

The outlook among trades and service clients, on the other hand, was brighter. Among the respondents from the trades service industry, **70%** said they anticipated an **increase in bookings** in the next 12 months.

This is partly a result of increased demand and new social distancing rules enabling people to return to full-time work while protecting their health.³⁷

Likewise, the outlook among marketers is generally positive; **75%** anticipate an **increase in bookings** in the next **12 months**.

Looking at the future, most Setmore customers are positive. **72.9%** said they anticipate an **increase in bookings** in the next year.



Conclusion.

What does this all mean for **the future of appointment scheduling**?

The push to **centralize resources, provide autonomy** and **personalization** to customers, and the **cost savings** associated with **online appointment scheduling**, mean it will become more prevalent across industries.

The frequency of random visits to bricks and mortar businesses, casual check-ins with clients and unscheduled in-office meetings is unlikely to return to pre-covid levels. Businesses already working to establish clear processes in the post-covid landscape will require every **organisational tool** at their disposal.

Simultaneously, in the wake of the coronavirus pandemic, any technologies that **limit the amount of contact between people** will become the preferred option. Ultimately, any tool that **increases convenience** while **reducing expenditure** (of resources, capital and effort) will be of benefit to businesses. As Morrow says: “We are still in the very early days of the digital scheduling evolution. The end goal is to give back customers and businesses the most valuable commodity for all of us... time.”



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