



2020 Healthcare Consumer Trends Report

THEME: 01 02 03 04

Importance of access

THEME 01 02 03 04

Discover more themes and view the full report [here](#).

The importance of access

51%

of consumers believe convenient access is the single-most important factor driving their care decisions

The issues raised in the boardroom aren't always the ones on patients' minds. But on one subject, consumers and leaders are starkly aligned: they're both concerned about access.

Health-system CEOs report that access to care is today's predominant concern for healthcare leaders.¹ Consumers seem to share that opinion. More than 60% of the comments in NRC Health's Real-time Feedback data-set mention ancillary parts of the care experience, including issues related to access.

Access, then, is a clear priority for consumers. And it's one of the main drivers of patient decision-making as they select a provider.² Previous research from NRC Health has found that up to 51% of consumers believe convenient access is the single most important factor driving their healthcare decisions³—and that up to 80% of patients are willing to switch providers for "convenience factors" alone.⁴

This desire for convenience likely explains consumers' growing appetite for access innovation. For example, 62% of consumers are open to digital channels of care delivery, if it means more expedient access to care.⁵ In the same vein, a third of patients say they'd prefer to book their own appointments online⁶—more than ever before.

Developing such capabilities is clearly in health systems' best interest. Streamlining access will not only improve an organization's ability to attract new consumers—NRC Health's research has found it will also prove an increasingly vital component of consumer *retention*. A statistical examination of patients' comments reveals a startling correlation between positive comments about access and long-term consumer loyalty.

Streamlining access is key to attracting consumers and retaining patients

Research showed that if a patient leaves a positive comment about admission or registration, they are **46 times more likely** to be a promoter for a healthcare brand, compared to similar patients who leave negative comments about these features. Comments about wait times show a similar effect: consumers with positive comments about wait times are **20 times more likely** to be promoters than patients who leave negative comments about wait times.

Patients who indicate a positive admission experience are 46 times more likely to be a brand promoter

Alleviating friction is the best tactic for attracting and retaining patients

These indications show that, for health systems looking to maximize both immediate and long-term appeal to consumers, **alleviating points of friction within the process may be one of the most important tactics to pursue.**

“If we want the privilege to serve, we have to be chosen.”

JENNIFER MCCLEAN

VP of strategic initiatives and patient experience, Mercy Health

A healthcare vocation can be difficult to square with the demands of the marketplace and the emerging nature of consumer-centric choice. But Jennifer McClean, VP of strategic initiatives and patient experience at Mercy Health, elegantly brings them together.

“As healthcare providers, we’re called to serve and we want to provide healing, in the many ways that can be offered,” she says. “But in order to do that, we have to first be chosen from among many options, digital and traditional, in the market today.”

Jennifer believes that providers who can’t attract consumers will have less opportunity to carry out their call to serve than those who develop strong patient-centered practice standards and a reputation for personalized, compassionate care. Appealing to the consumer’s sensibilities, she says, is an important part of serving a community—

and increasingly, **the larger part of consumer preferences boils down to one essential trait: ease.**

“Think about the consumer and the frustration they have with their choices in the marketplace,” Jennifer says. “Our job is to make those choices easier—to smooth the path for them to reach us.”

An essential part of this work is understanding the early phases of a consumer’s care journey—the moments between when a health need arises and when the patient arrives in an exam room, and the coordination of steps that follows. Jennifer argues for simplifying these steps as much as possible.

Many providers, though, operate under the assumption that they’ve already streamlined the appointment-setting and arrival process, and that things are already as simple as they could be.

“It’s easy for us, as providers, to have the self-perception that we’re really doing well,” Jennifer says, “but unless we look carefully at the decisions available to the consumer, that confidence is misplaced.”

Jennifer’s advice for providers who want to better understand the consumer’s journey? It’s simple—walk in the footsteps of consumers in the market, and consider looking *outside* the patient population you’re currently serving, toward those who have not yet chosen your organization.

“You learn just as much, or even more, from the consumers who *don’t* choose you,” she says. “Examining your market as a whole is a great place to start.”

SOURCES

- 1 Advisory Board. (2017) "What 183 C-suite Executives Told Us About Their Top Concerns." Retrieved from <http://www.advisory.com/research/health-care-advisory-board/blogs/at-the-helm/2017/04/hcab-topic-poll>
- 2 Heath, S. (2017, July 17.) "3 Factors Swaying Patient Decisions for Treatment Facilities." *PatientEngagementHIT*. Retrieved from <https://patientengagementhit.com/news/3-factors-swaying-patient-decisions-for-treatment-facilities>
- 3 Masterson, L. (2019, January 7). "Convenience More Important to Patients than Quality of Care, Survey Finds." *Healthcare Dive*. <https://www.healthcarediver.com/news/convenience-more-important-to-patients-than-quality-of-care-survey-finds/545365/>
- 4 NRC Health. (2018, October 18). "Effortless Care Experiences." <https://nrchealth.com/wp-content/uploads/2018/06/Effortless-Healthcare-White-Paper.pdf>
- 5 Heath, S. (2016, June 27.) "Can Digital Communication, mHealth Boost Patient Satisfaction?" *PatientEngagementHIT*. Retrieved from <https://patientengagementhit.com/news/can-digital-communication-mhealth-boost-patient-satisfaction>
- 6 Kyruus. (2019, November 5.) "2019 Patient Access Survey." Retrieved from <https://www.kyruus.com/news/new-patient-access-survey-shows-consumers-are-increasingly-self-empowered-in-their-care-decisions-and-place-a-growing-premium-on-convenience>

**NRC Health helps healthcare organizations
better understand the people they care for and
design experiences that inspire loyalty.**

02.20.1.0

© NRC Health