JANUARY 2019

Healthcare 2019: Trends and Predictions

Your Presenters

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NRC Health

1/11/19: “Quitter’s Day”

2018 Healthcare in Review

2018 Healthcare in Review

- Spend on healthcare IT up

  $7B+

  - Data security
  - Centralizing EMRs
  - Focus on data interoperability (FHIR)

84%

of Fortune 50

NRC Health's Bold Predictions for 2018

- ❑ Consumerism becomes a central pillar of governance
- ❑ Digital engagement spending will double (again)
- ❑ We see an uptick in Natural Language Processing
- ❑ Service recovery will speed up dramatically
- ❑ Price transparency begins to emerge
- ❑ Brands invest in wellness v. sickcare

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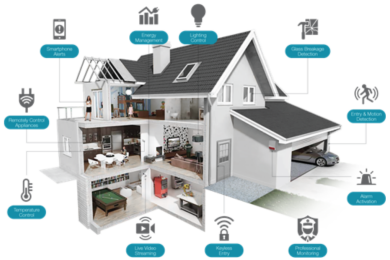
…2019 the year of the connected consumer



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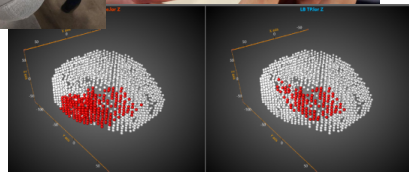
The next wave of wearable tech



Wearable adoption

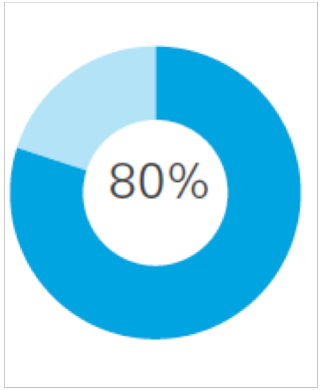
19%

increase since 2016 in consumers using wearable devices to capture fitness data

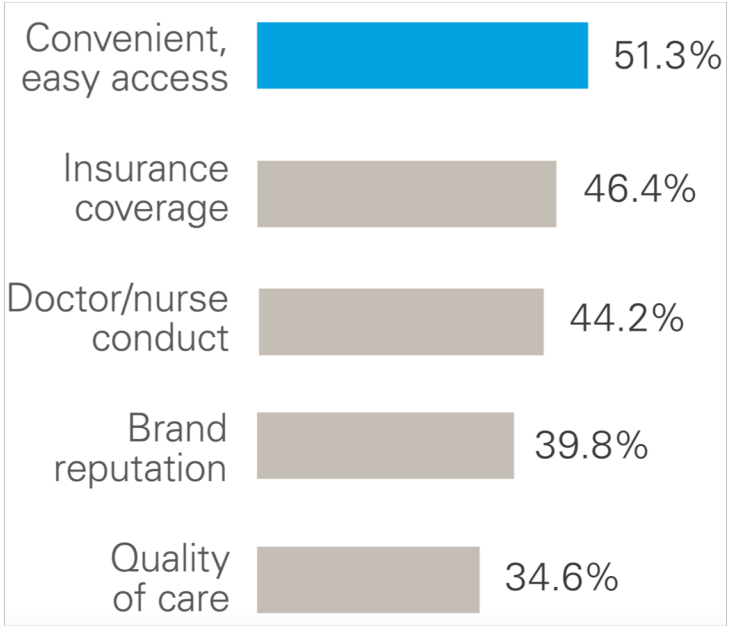
$2 Trillion worldwide digital transformation technology by 2020

IDC

Driven by a Consumer Desire for Convenience



80% of patients reported that they'd switch providers for "convenience factors" alone.



Poll: Which of the following digital initiatives have received the most investment from your organization?

- Performance improvement
- Capturing experience metrics
- Competitive benchmarking & intelligence
- Experience improvement
- Implementing digital health

NRC Health Consumer Research Findings

nrc HEALTH

Deferment

22.8%

of patients deferring "necessary medical treatment"

This is the highest percentage since 2010.

Outmigration

15.1%

of patients are leaving their market to receive medical treatment

32.1% will travel more than 100 miles for healthcare services.

Those in the 35-44 age range represent 6.4% year-over-year growth in outmigration for pediatric services.

Doctor Selection

34%

Year-over-year growth in consumers placing importance in selecting providers in which they've had a previous experience

Finding a doctor that listens well remains the top selection factor for the 4th consecutive year.

Once a consumer becomes a patient, how do they prefer to provide their feedback?

Consumer preference in giving their feedback

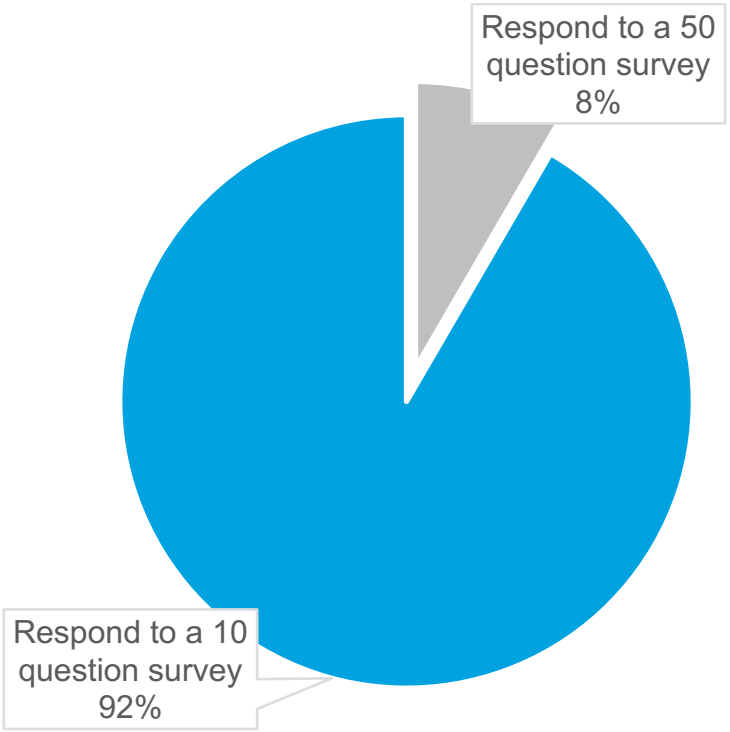
44% of consumers want to give feedback with each visit

55% prefer to give feedback via email

73% of consumers prefer to give feedback within a few days

2017 Study Conducted by NRC Health consisting of 3,089 national respondents.

Keep the outreach as short as possible

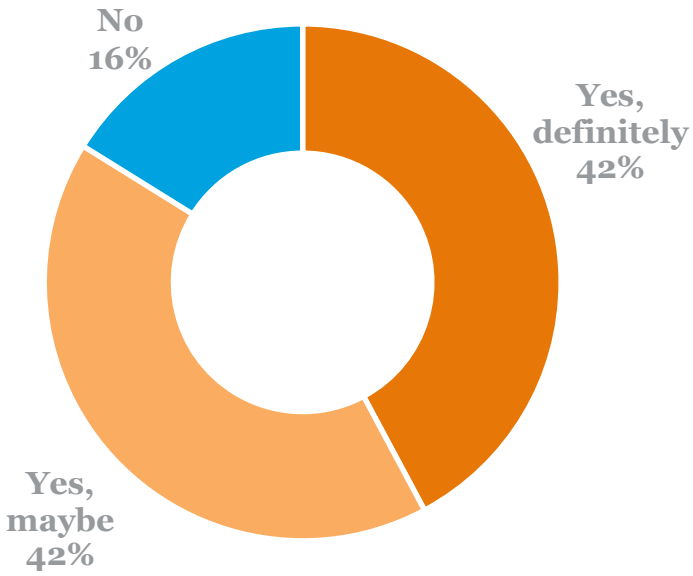


2017 Study Conducted by NRC Health consisting of 3,089 national respondents.

The expectation to “Make it right”

84%

of patients expect you to follow up with them if they have a bad care experience.



2017 Study Conducted by NRC Health consisting of 3,089 national respondents.

Poll: What percent of patient comments trigger a service recovery opportunity?

- >50%
- 16-25%
- 10-15%
- <10%

2018 NRC Customer's Service Recovery Summary

84,000

Service recovery opportunities

68%

Average service recovery resolution rate

38%

Of service issues are resolved within 24 hours, 55% within three days and 69% within a week.

Is the healthcare industry moving the needle in patient loyalty?

Loyalty is on the rise

61.3%

of consumers report being loyalty

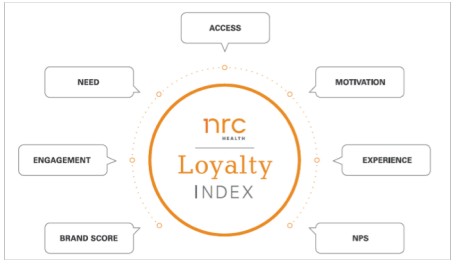
3.2%

year-over-year growth.

Those in the 65+ age cohort report the highest loyalty of

70.4%.

Measuring brand loyalty



BRIEF

New hospital ranking looks at customer loyalty

Top 10 Consumer Loyalty

#1 CHI Memorial Hospital Chattanooga
#2 New York-Presbyterian/Weill Cornell Medical Center
#3 Hospital of the University of Pennsylvania
#4 University of Utah Health
#5 McLeod Regional Medical Center— Florence
#6 Nebraska Medicine
#7 University of Chicago Medicine
#8 University of Iowa Hospitals and Clinics
#9 UW Health (Madison, WI)
#10 Hoag Memorial Hospital Presbyterian

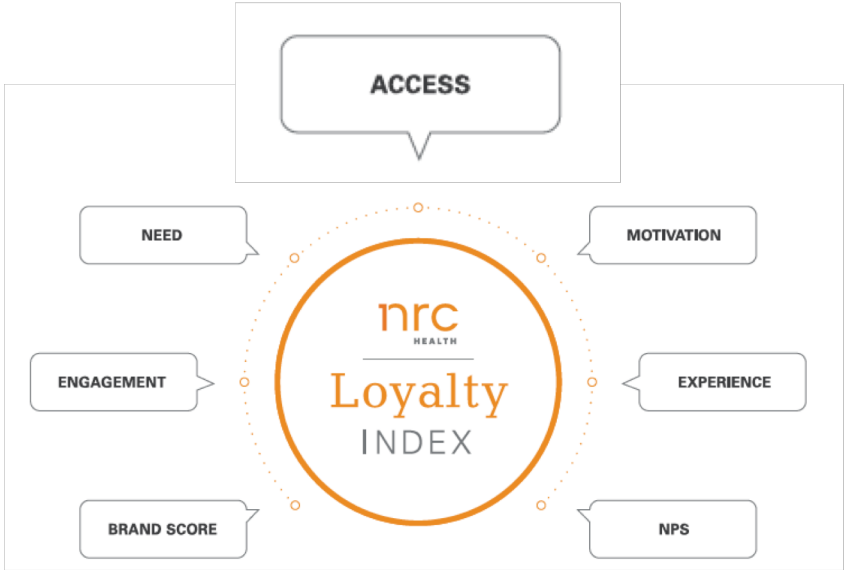
Access Audit: Online Scheduling

3/10

Have an explicit call out to schedule an appointment.

10/10

Have highly visible “Find a Doctor” page areas; many in top left of menu



Aligning your website to consumers

28% of consumers want to ability to find a physician
(#1 most important requested website information)

27% want to see ratings of reviews of physicians *(#2)*

39% of consumers under 35 request payment & billing as top website information

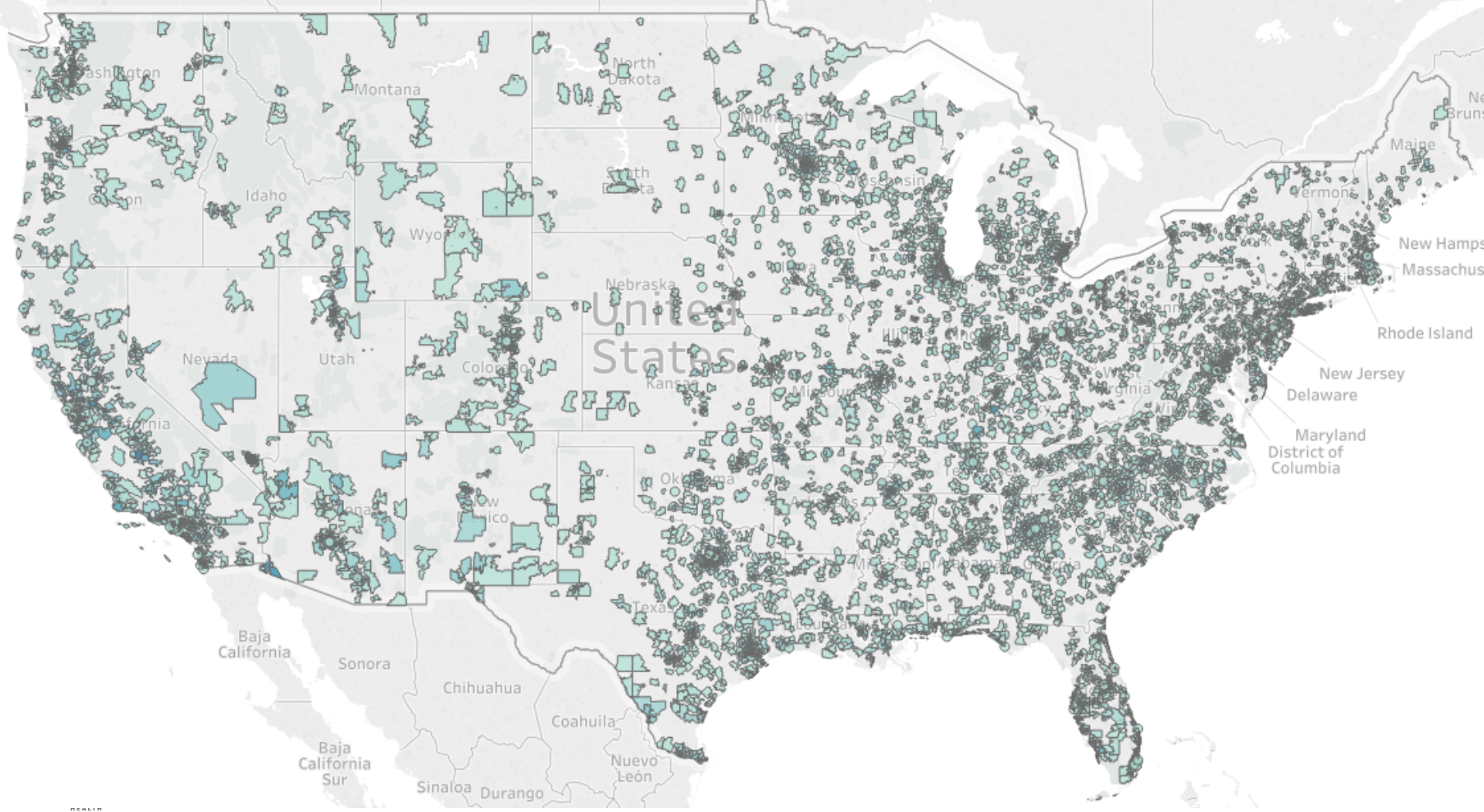
Telemedicine Adoption Curve Accelerating?

90%

Higher future top-box excitement levels to use telemedicine

8% Of consumers report using telemedicine

214% Higher future top-box excitement levels to use telemedicine for consumers over the age of 65



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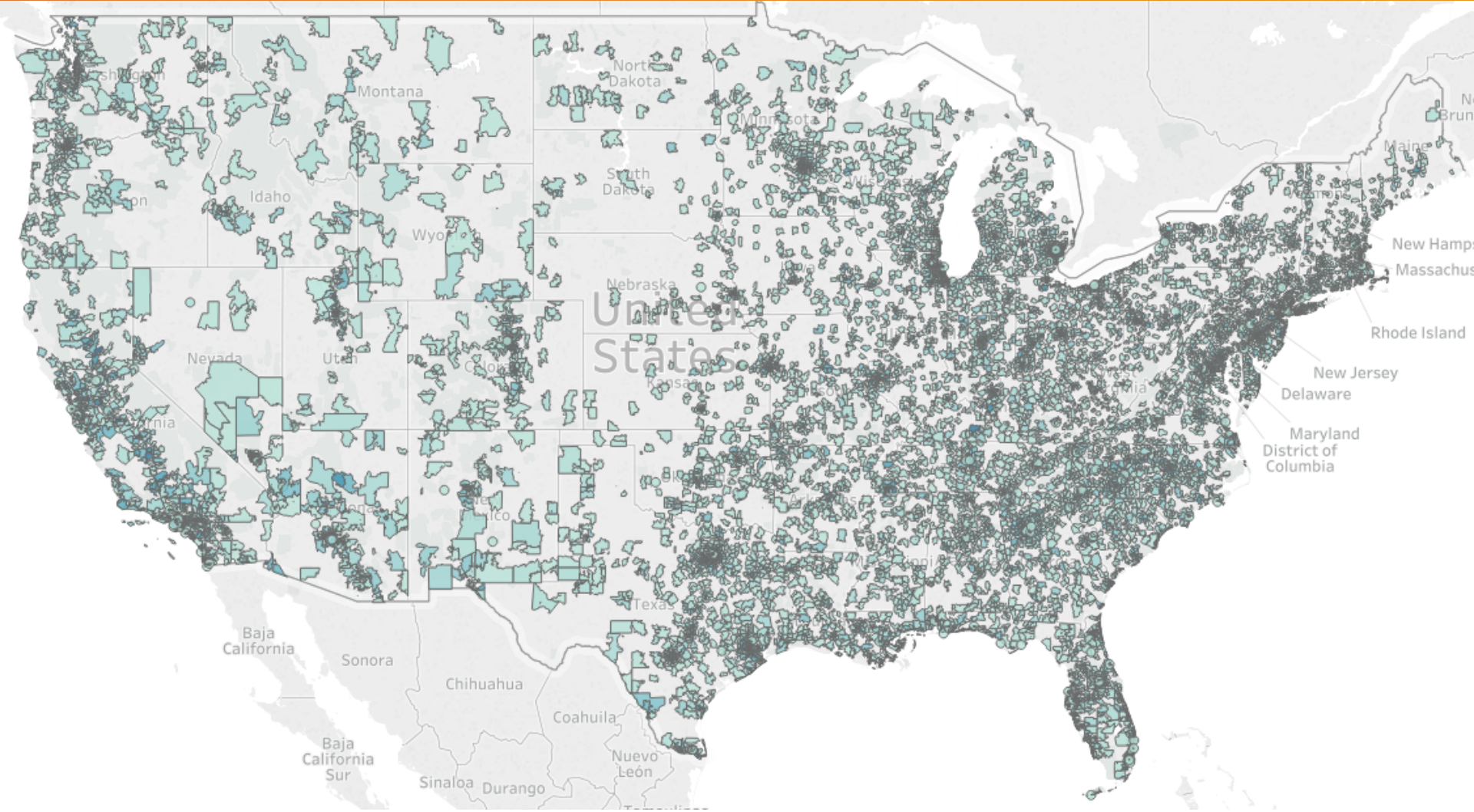
Chihuahua
Coahuila
Baja California Sur
Sinaloa
Durango
Nuevo León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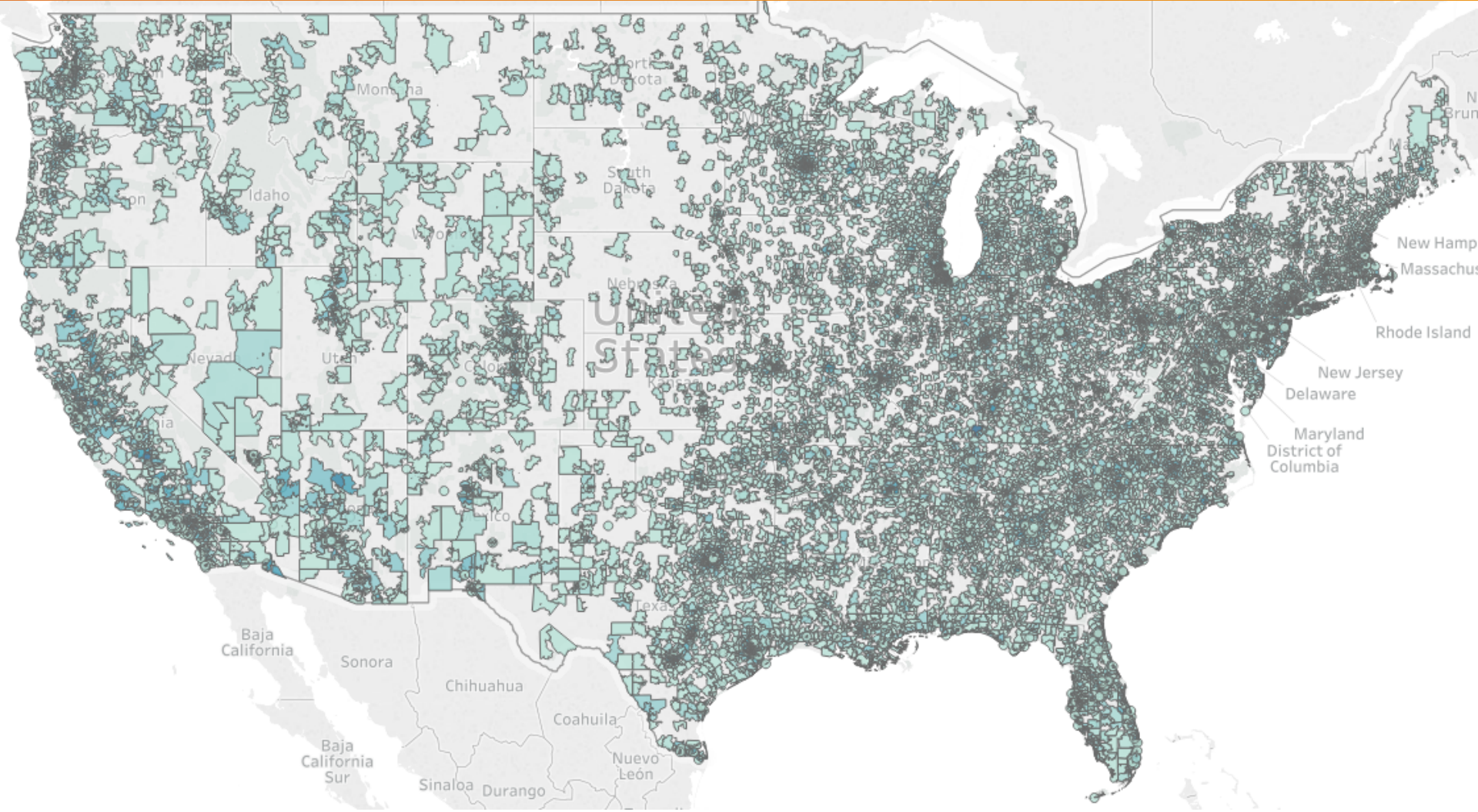
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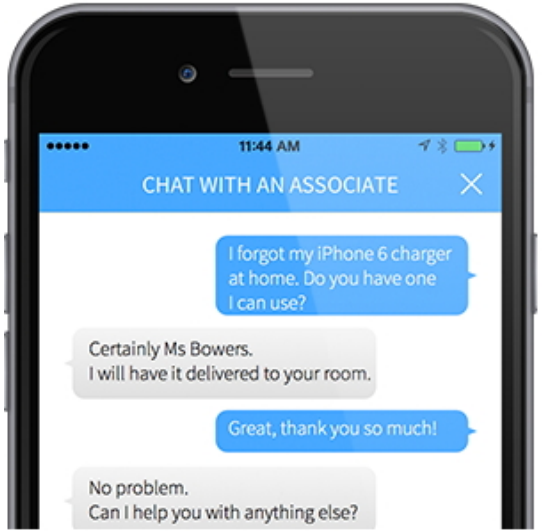
5 Predictions for 2019

01

Convenience, Access & Personalization Converge

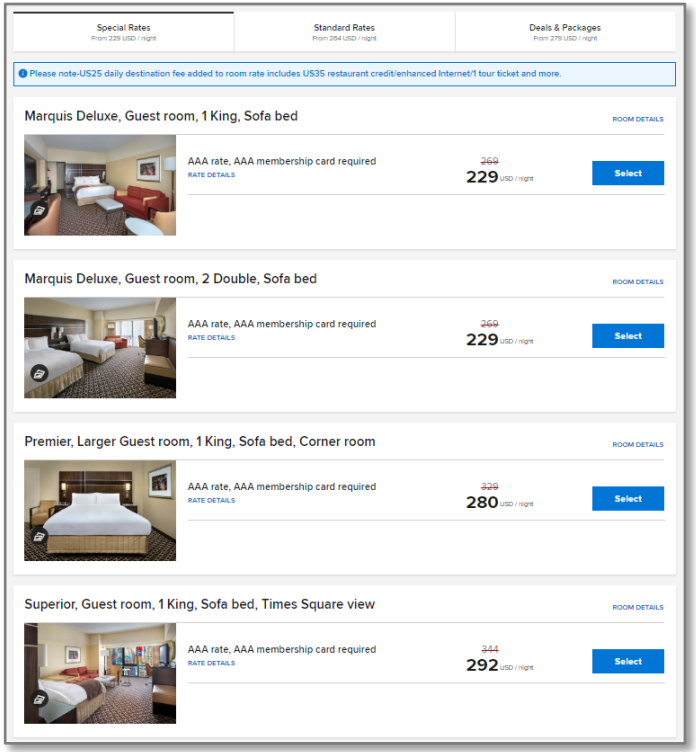
Out of industry profile: Hospitality

- ✓ Digital Transformation
- ✓ Online (App) Booking
- ✓ Early Check-in
- ✓ Elevated Service
- ✓ Service Issue Resolution



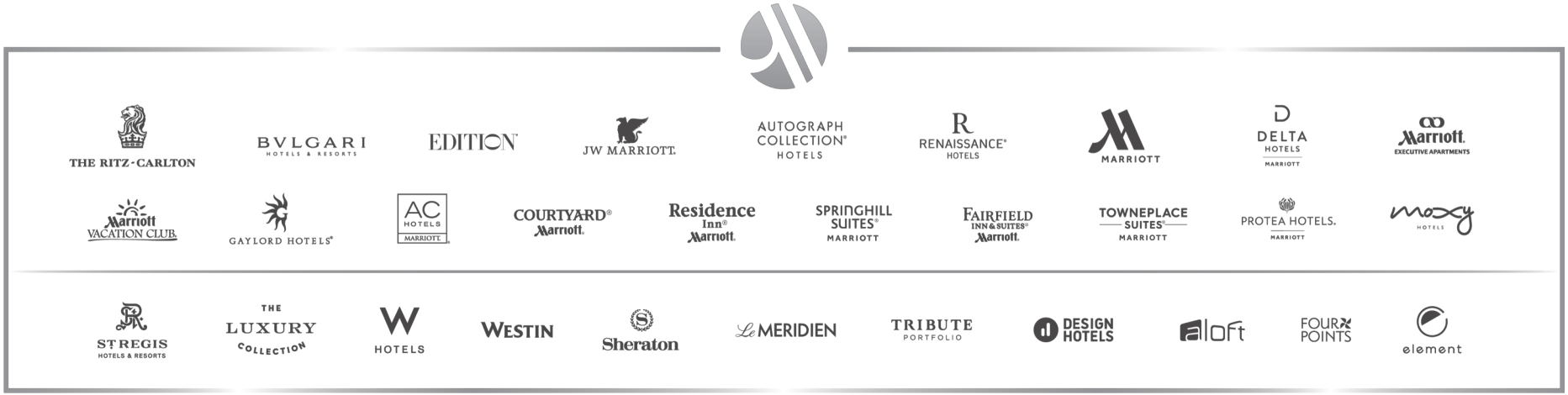
Out of industry profile: Hospitality, cont.

- ✓ Online Ratings & Reviews
- ✓ Loyalty Rewards
- ✓ In-moment Amenities
- ✓ Price Transparency
- ✓ Pre-pay



Out of industry profile: Hospitality, cont.

✓ Mature Branding Strategy & Niches



Recommendation

- Digital scales (and is preferred)
- Continue to borrow from industries that do this better than healthcare

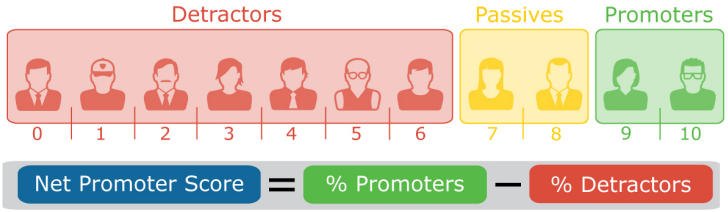
02

Customer Loyalty Becomes *THE* Metric that Matters

Measuring loyalty through NPS

Net promoter score is used in and out of industry as a way of measuring loyalty with 1 simple question:

"How likely are you to recommend <<brand/product>> to a friend, family member, or colleague?"



Costco
Type: B2C
Size: Large
45

Walmart
Type: B2C
Size: Large
40

Starbucks
Type: B2C
Size: L
77

Macy's, Inc.
Type: B2C
Size: Large
32

Microsoft Office
Type: B2C/B2B
Size: Large
33

Tesla Motors
Type: B2C
Size: Large (>100M $)
97

Recommendation

- Socialize “loyalty” internally
- Deploy NPS as an enterprise metric at every care setting
- Capture qualitative themes and proactively address opportunities to enhance loyalty

03

Technology + Simplicity Enables High-Touch Care

ANNALS OF MEDICINE NOVEMBER 12, 2018 ISSUE

WHY DOCTORS HATE THEIR COMPUTERS

Digitization promises to make medical care easier and more efficient. But are screens coming between doctors and patients?

By Atul Gawande

amazon

Recommendation

- Less is more: reduce system/process redundancy to eliminate waste (centralize systems wherever possible)
- Know more about what matters most to patients *before* the encounter
- Consider implementing an intelligent feedback system, that:
  - Gives every customer/patient opportunity to provide feedback
  - Tracks engagement longitudinally
  - Provides visibility to appropriate, proactive action

04

Renewed Focus on Reducing Clinician Burnout

25%

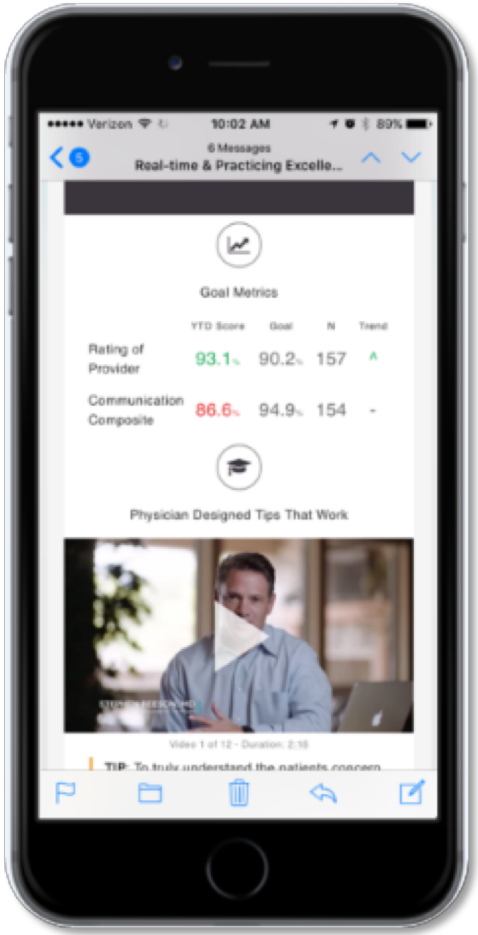
Would not recommend

49%

Of clinicians are burned out

Recommendation

- Give time back – “Home for Dinner”
- Provide micro-learning opportunities
- Share patient voice freely



Dr. Dana Rice - Inova
https://www.inova.org/Physician_Directory/Dana-C-Rice-MD/823934
★★★★★ Rating: 4.8 - 1,731 votes
Dana C. Rice, MD. A member of Inova Medical Group. **Dr. Dana Rice**. 4.8out of 5. (1731 Ratings, 596 Comments). Board Certified Specialty: Urology.

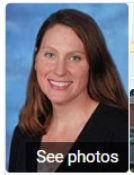
Dr. Dana C Rice MD Reviews | Fairfax, VA | Vitals.com
https://www.vitals.com/doctors/Dr_Dana_C_Rice.html
★★★½☆ Rating: 3.3 - 12 votes
Nov 26, 2018 - The overall average patient rating of **Dr. Dana C Rice** is Good. **Dr. Dana C Rice** has been rated by 12 patients. From those 12 patients 6 of ...

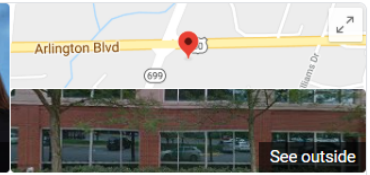
Dr. Dana Rice, MD - Book an Appointment - Fairfax, VA - Healthgrades
https://www.healthgrades.com/physician/dr-dana-rice-ysxtt
★★★☆☆ Rating: 3.2 - 24 reviews
Urologist **Dr. Dana Rice** was assigned to her case. Dr. Rice is all kinds of wonderful!!! Skilled. Competent. Patient, warm and kind. Reassuring bedside manner.

Appointments and Hours of Operation for Dr. Dana Rice, Fairfax, VA
https://doctor.webmd.com › ... › Virginia › Fairfax › Dr. Dana C. Rice, MD
★★★½☆ Rating: 3.6 - 16 votes
Get appointment information and hours of operation for **Dana Rice**, practicing Urology **doctor** in Fairfax, VA.

Dana Rice, MD: Developer of UTI Tracker, a Medical App
https://hippocratichustle.com/dana-rice-md-developer-of-uti-tracker-a-medical-app/
Jun 12, 2017 - **Dana Rice**, MD is a urologist in Fairfax, VA. ... Contact **Dr. Rice** at info@utitracker.com to request patient information cards or for more ...

Dr. Dana Rice, Urologist in Fairfax, VA | US News Doctors
https://health.usnews.com › Health › Doctors
Dr. Dana Rice is an urologist in Fairfax, Virginia. She received her medical degree from George Washington University School of Medicine and has been in ...





Dr. Dana C. Rice M.D.

Website | Directions | Save

4.6 ★★★★½ 9 Google reviews
Urologist in Annandale, Virginia

Address: 8503 Arlington Blvd #310, Fairfax, VA 22031
Hours: Closed · Opens 8:30AM Thu
Phone: (703) 208-4200

Suggest an edit

Questions & answers
Be the first to ask a question
Ask a question

Reviews from the web

Inova	Vitals.com	Healthgrades
4.8/5	3.3/5	3.2/5
1,731 votes	12 votes	24 reviews

Reviews
Write a review | Add a photo

"I highly recommend her **skills** as a **surgeon** as well."

05

Machine Learning and AI are Pervasive System-wide

For which of the following use cases is your organization leveraging or likely to leverage AI/ML?

Healthcare IT News Survey

Supporting clinical decision making – 77%
Extracting meaning from big data – 66%
Resolving operational inefficiencies – 59%
Enabling earlier diagnosis – 55%
Enabling population health management – 52%
Optimizing admin/clinical workflow – 48%
Increasing patient engagement – 45%
Advancing patient behavior change – 43%
Advancing personalized medicine – 41%
Improving data integration from connected devices – 41%

Supporting clinical decision making – 77%

Extracting meaning from big data – 66%

Resolving operational inefficiencies – 59%

Enabling earlier diagnosis – 55%

Enabling population health management – 52%

Optimizing admin/clinical workflow – 48%

Increasing patient engagement – 45%

Advancing patient behavior change – 43%

Advancing personalized medicine – 41%

Improving data integration from connected devices – 41%

Recommendation

- AI/ML is not for the sole use of clinical workflow & diagnosis
- Employ to glean pattern recognition & predictions from vast, disparate data sets (both structured and unstructured)

Summary

Summary

- Consumers Crave Convenience & Personalization
- Building Patient Loyalty is Key
- Focus on Provider Wellbeing
- Leverage Technology to Get Closer to Your Consumers and Patients

Thank You!

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zzobel@nrchealth.com - @ZachZobel

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