Healthcare 2019: Trends and Predictions
Your Presenters

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1/11/19: “Quitter’s Day”
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
...2019 the year of the connected consumer

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.

- Convenient, easy access: 51.3%
- Insurance coverage: 46.4%
- Doctor/nurse conduct: 44.2%
- Brand reputation: 39.8%
- Quality of care: 34.6%
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
Deferment

22.8% of patients deferring “necessary medical treatment”

This is the highest percentage since 2010.
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

- Respond to a 10 question survey: 92%
- Respond to a 50 question survey: 8%

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 loyal.

3.2% year-over-year growth.

Those in the 65+ age cohort report the highest loyalty of 70.4%.

NRC Health Market Insights Syndicated Study, National Analysis 2018
Measuring brand 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

NRC Health Market Insights Syndicated Study, National Analysis 2018
5 Predictions for 2019
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
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?”

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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
Technology + Simplicity Enables High-Touch Care
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
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
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 C. Rice, MD

https://www.inova.org/Physician_Directory/Dana-C-Rice-MD/623924

Rating: 4.8/5, 1,731 votes
Dana C. Rice, MD, A member of Inova Medical Group. Dr. Dana Rice is rated 4.8 out of 5. (1731 Ratings, 12 Votes) Comments: Board Certified Specialty: Urology.

Dr. Dana Rice, MD Reviews | Fairfax, VA | Vitals.com
https://www.vitals.com/doctors/dr-dana-rice-fairf...t.html

Rating: 3.3/5, 12 votes
Nov 26, 2018 - The overall average patient rating of Dr. Dana C. Rice is 3.3. 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

Rating: 3.2/5, 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/.../Fairfax-VA-Dr.-Dana-C-Rice-MD

Rating: 3.6/5, 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

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 information.

Dr. Dana Rice, Urologist in Fairfax, VA | US News Doctors
https://health.usnews.com/.../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...
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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