



# 2020 Healthcare Consumer Trends Report

THEME: 01 02 03 04

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Consumer experience comes first

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# Consumer experience comes first

# 85%

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The last few years have seen a surge in non-traditional players moving into the healthcare sector. Health-system leaders have taken notice: 88% of healthcare executives agree that their organization is vulnerable to disruption from non-traditional companies.<sup>1</sup>

Whatever innovation comes, it will be extremely unlikely to unseat the primacy of the provider encounter for consumers. NRC Health's research shows that, on the whole, consumers have overwhelmingly positive feelings about their interactions with providers—**85% of patients' provider-related comments are positive.**

Instead, traditional providers' vulnerabilities are likely to lie where the industry lags behind: on ancillary parts of the encounter like access, billing, and wait times. Only a minority of patients, no matter what their age cohort, report feeling satisfied with these aspects

of their care. This may be because healthcare is unable to move as nimbly as its start-up contemporaries; the industry cannot streamline its administrative functions in the vein of Amazon or Netflix.

Billing, invoicing, and cost present particularly strong misalignments between consumer expectations and health-system practice. According to the Beryl Institute, 89% of consumers believe that a clear and comprehensible billing process is essential to a good experience.<sup>2</sup> Yet a majority (61%) of patients are unable to understand their bill when it arrives in their mailbox.<sup>3</sup>

Comprehending the invoice is far from the end of consumers' problematic relationship with bills. All too often, the figure on the invoice is also beyond their ability to pay. This is likely why, according to NRC Health's research, 27.6% of patients have deferred a necessary care treatment—up from 22.1% in 2018.



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Billing-related issues remain a consistent source of frustration for consumers. Enduring customer loyalty will, in large part, depend on healthcare organizations' efforts to resolve them. The closer healthcare encounters come to frictionless experiences,<sup>4</sup> the better patient perceptions will be.

These positive experiences are the gateway to enduring loyalty from healthcare consumers. They're by no means sufficient to secure consumer loyalty,<sup>5</sup> but without a robustly positive experience, organizations have little hope of ensuring that customers will come back.

accountability in place, there's no structure to actually help our people be successful."

The foremost aspect of introducing this accountability, Abhishek believes, is data. It's not enough for health leaders to proselytize empathic care to the workforce. They have to set measurable, evidence-backed goals—and that starts with the numbers.

"By showing care teams experience data every day, we send the message that leadership is invested in their work—we show our teammates that their contributions are meaningful in a real, measurable way," Abhishek says. "It's a compelling way to bring the mission statement to life."

Paying such keen attention to the data, furthermore, offers unique opportunities for improvement. Importantly, Abhishek emphasizes, it's not just about correcting missteps—it's about finding new ways to help staff re-engage with their work.

"In analyzing feedback, it can be a temptation to focus on the negatives," he says, "but it's just as important, maybe even more important, that you underscore the positives, too. Celebrate progress. Recognize people all the time, even for little things. If you praise the little things, the big things come."

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## "The right intentions are not enough. You need structure and rigor, too."

**ABHISHEK DOSI**

*CEO, Sutter Solano Medical Center*

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Abhishek Dosi, CEO of Sutter Solano Medical Center, knows that most providers are passionate about serving their patients. But he also recognizes that passion alone won't deliver the outcomes that health organizations are looking for.

"Our people are caregivers," he says. "They're showing up every day to do their best and help people. But if you don't have that daily rigor and

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