



# 2020 Healthcare Consumer Trends Report

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Follow-up matters + Expert recommendations

**THEME 01 02 03 04**

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# Follow-up matters

Easing access to care, and perfecting the care experience once a patient has arrived, are two important steps to winning consumer loyalty. These initial phases of a care encounter, however, are far from a complete reckoning of a patient's relationship with their provider. NRC Health's research has uncovered that what happens *after* a care experience may be nearly as important as what happens in a facility—

that the mode, means, and timing of post-discharge interactions all weigh heavily on consumers' impression of an organization.

Consider first the impact of a provider's discharge practices. It's well documented that a poorly managed discharge process comes with a clinical cost. This is why post-discharge calls can substantially decrease the risk of readmissions.<sup>1</sup>



What may go underappreciated, however, is the impact that a mishandled discharge has on the overall patient experience. Though patients' opinions on the clinical experience diverge across demographic groups, on one point they all agree: **they're all dissatisfied with the discharge process.** The majority of patient comments, across all age groups, express dissatisfaction with what happens when patients leave an organization.

With 70% of their discharge-related comments being negative, Millennial and Generation Z consumers appear to feel this dissatisfaction most acutely. This shouldn't be too surprising, as younger consumers have come to expect "high-touch" service interactions from every segment of the economy: 65% of Millennial and Generation Z consumers are eager to accept daily check-ins from their providers,<sup>2</sup> and 70% of them are likely to prefer providers who can follow up with them via text message.<sup>3</sup>

Another consequence of consumerism's hold on the economy is that the timeline for service resolution has been remarkably compressed. All of the preferences presume an encounter that has gone smoothly; expectations sharply increase in the event of a service mishap. According to NRC Health's research, 74.8% of consumers expect follow-up within two days of a service problem. After just one week, 66.29% of consumers say that unaddressed service issues are "irreparable."

These statistics underscore the expansiveness of the consumer-provider relationship. The definition of an encounter has expanded well past what happens in a facility, and a disappointing post-care encounter can be just as consequential as a mishandled moment in the exam room.

# 70%

of consumers under 37 are dissatisfied with discharge

# 74.8%

of consumers expect follow-up within 48 hours

# Expert recommendations

## 01

To position your organization with customers, understand their decision-making process.

**JENNIFER MCCLEAN**

*VP of patient experience, Mercy Health*

As alternative models of care emerge to meet consumers' needs, it becomes all the more important that health systems learn to distinguish themselves. They'll struggle to do that, unless they achieve a firm understanding of how consumers make their care decisions.

Even as they've amassed clinical expertise and streamlined their services, too many organizations still struggle with positioning. Their customers' care journeys—the string of choices made between the emergence of a health need and when they make their first appointment—are still opaque to them.

Illuminating these care journeys demands a shift in perspective. Organizations must be able to adopt the consumer's point of view as they weigh their options in the marketplace. To do that, they should consider data and market intelligence that falls outside of the traditional purview of patient satisfaction.

Gaining broad-based insights into the market, assessing why consumers choose competing organizations, tracing the footprint of non-traditional providers in their communities—all of these will help health-system leaders grasp where they stand. This, in turn, will help them better position their organizations to attract more customers.

## 02

Everyone wants ease. But be careful—consumers perceive ease differently.

**BRIAN CURTISS**

*Marketing director, BayCare Health System*

Friction is a consistent bugbear for healthcare consumers.

There's no escaping the fact that compared with what they experience elsewhere, consumers in healthcare experience far more frustration in procuring what they need. Easing the path to care, then, stands out as a clear opportunity for intervention. But the means to achieve that ease are far less clear.

No doubt, part of the issue stems from the complexity of healthcare transactions. Even the simplest medical service is orders of magnitude more complicated than the service provided by a ride-sharing app.

Complicating matters further is the range of customers involved. Health systems have a mandate to serve *everyone*. Each customer brings their own expectations to bear on healthcare organizations, and encounters a slightly different facet of the organization once they arrive.

This means that every customer will also have a different sense of what ease should feel like. A digital appointment-setting system will feel like a breath of fresh air for tech-savvy Millennials—but a serious hurdle for members of the Silent Generation.

“Ease,” then, is in the mind of the beholder—a fact that organizations should consider as they plan interventions to make their offerings more convenient.

Who benefits from this change? Who might be alienated? Might we be deterring more customers than we attract? Organizations ignore questions like these at their peril.

## 03

### High aspirations are good. Consistency is better.

#### ABHISHEK DOSI

*CEO, Sutter Solano Medical Center*

Creating better customer experiences is a fixture in health organizations’ strategic plans, and rightly so. A smooth, seamless

customer experience not only leads to better business outcomes, but can improve clinical outcomes as well.

Leaders, therefore, encourage staff to reach for higher levels of performance, to deliver care at the very peak of their capabilities. Such steps should be celebrated—so long as they don’t come at the expense of *consistency*.

Many organizations, in their exuberance for experiential improvement, try to operate along too many axes at once: working on perfecting the post-discharge transition, for instance, and simultaneously pushing a new initiative on rounding, all the while chipping away at wait times in the interim.

Institutions, like individuals, have only a finite reserve of energy to apply to any given strategic goal. Too many conflicting priorities can scatter the attentions of the people involved. Chasing two initiatives, organizations often end up fulfilling none.

A sober, incremental approach can be more effective. Consistently reinforcing the basics is the better way to make a meaningful impression on clinicians. If backed by regular data-sharing, it shows that leadership is investing in a global experiential improvement—which in turn inspires confidence, and competence, among health-system staff.



## SOURCES

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- 3 Meyer, H. (op. cit.)

**NRC Health helps healthcare organizations  
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design experiences that inspire loyalty.**

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