

# Patient No Longer Accelerating Consumer-Centered Care



A Governance Institute Webinar

*presented by*  
Ryan Donohue, Strategic Advisor  
NRC Health & The Governance Institute

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HEALTH

## Today's Presenter



Ryan Donohue is considered a thought leader in the realm of healthcare consumerism. He currently serves as Corporate Director of Program Development for NRC Health and as an Advisor for The Governance Institute. Ryan has authored many publications on the topic of strategic branding and consumerism including *The New Payer: What Makes the Healthcare Consumer Tick?* and *The Curious Case of the Healthcare Consumer*. His latest research has culminated in a brand-new book called *Patient No Longer*, now available through Health Administration Press, a division of the American College of Healthcare Executives.

# Learning Objectives

After viewing this Webinar, participants will be able to:



## Define Consumer Revolution

Define the healthcare consumer revolution and articulate reasons why healthcare has fallen behind other industries in implementing a consumer-focused approach.



## Accelerate the Transformation

Assess their own organization's position along the consumerism journey and develop targets and future goals for where the organization needs to be and when.



## Align, Integrate, & Eliminate Friction

Identify ways to enhance, accelerate, and integrate consumer-focused initiatives into care delivery while maintaining the big-picture perspective of how those initiatives will reduce or eliminate friction for healthcare consumers, as well as how they align with the mission, vision, and strategic goals of the organization.

# Continuing Education

Continuing  
education  
credits available



In support of improving patient care, The Governance Institute, a service of National Research Corporation, is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC) to provide continuing education for the healthcare team. This activity was planned by and for the healthcare team, and learners will receive 1 Interprofessional Continuing Education (IPCE) credit for learning and change.

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**Program level:** Overview · No advanced preparation required

**Field of study:** Business Management and Organization

**Delivery method:** Group Internet based

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- It remains for the audience to determine whether the presenters outside interests may reflect a possible bias in either the exposition or the conclusion presented. In addition, speakers must make a meaningful disclosure to the audience of their discussions of off-label or investigational uses of drugs or devices.
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- This educational activity does not include any content that relates to the products and/or services of a commercial interest that would create a conflict of interest. There is no commercial support or sponsorship of this conference.
- None of the presenters intend to discuss off-label uses of drugs, mechanical devices, biologics, or diagnostics not approved by the FDA for use in the United States.

# Roadmap

- *Patient No Longer*
- Consumerism + COVID-19
- The Hybridization of Patient Experience
- Post-Pandemic Strategy
- Discussion

# ***Patient No Longer***





## Polling Question



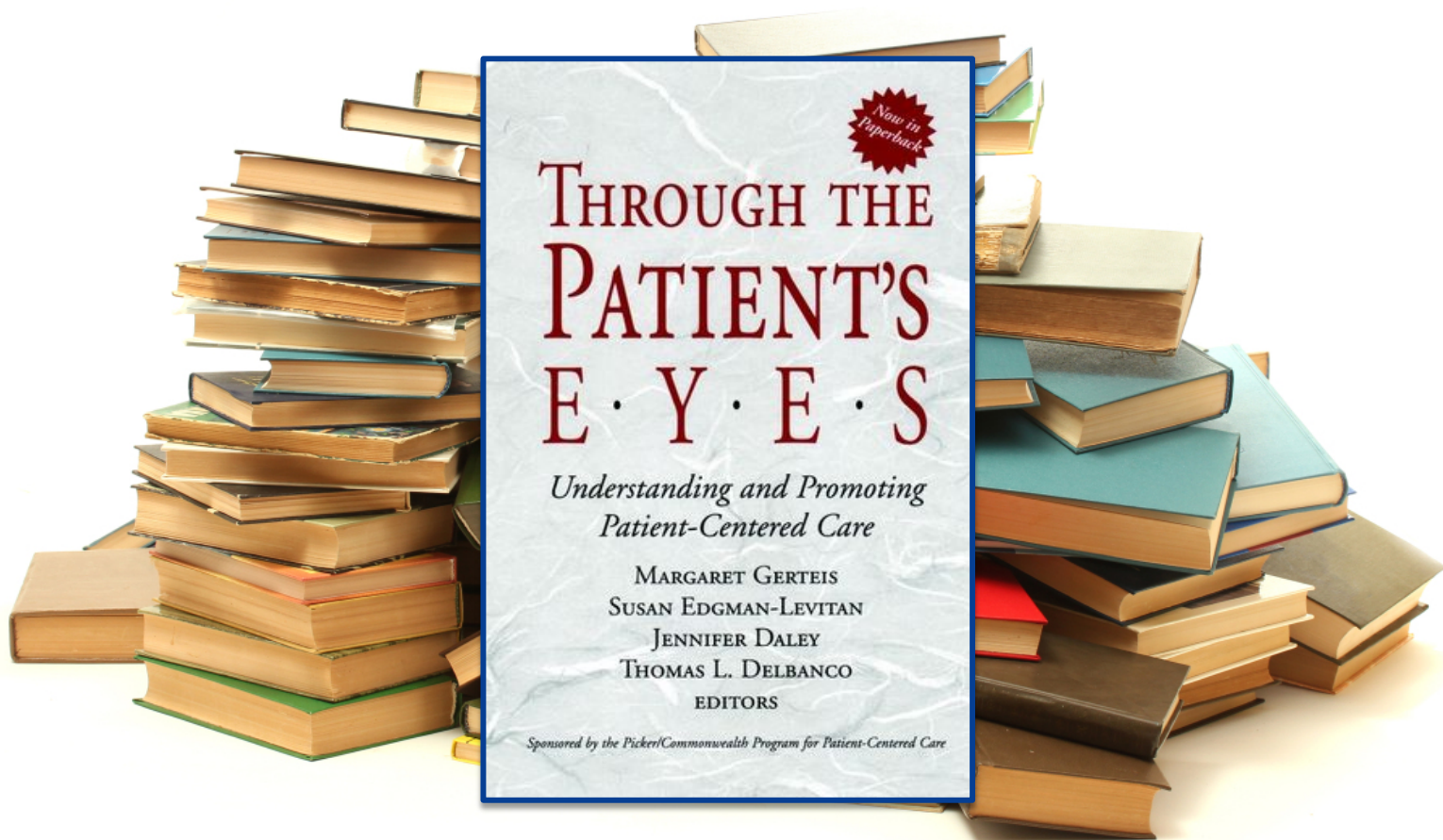
*Based on the Picker teachings, which era is the most patient-centered to date?*

- a) The advent of H-CAHPS (2006-2008)*
- b) The Clinton reform attempts (1990s)*
- c) The rise of network HMOs in 1980s*
- d) World War II (1930s & 1940s)*

## The Legacy of Harvey & Jean Picker







# Eight Dimensions of Patient-Centered Care

Eight Dimensions of Patient-Centered Care
Respect for patients' values, preferences, and expressed needs
Coordination and integration of care
Information, communication, and education
Physical comfort
Emotional support and alleviation of fear and anxiety
Involvement of family and friends
Continuity and transition
Access to care

Source: *The Picker Institute*.

## A Quarter-Century of Patient-Centered Care

- The Eight Dimensions grew in popularity.
- To doctors: treat the disease *and* the person.
- Industry shifted to HCAHPS and public reporting.
- The gravel road from volume/fee-for-service to value.
- An incredible shift in risk to regular people.

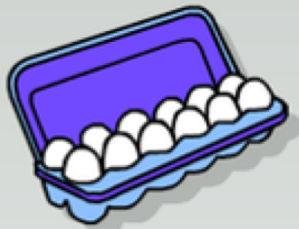


# The Rise of Consumerism in Healthcare





If other prices had grown as quickly  
as healthcare costs since 1945...



a dozen eggs  
would cost  
**\$55**



a gallon of milk  
would cost  
**\$48**

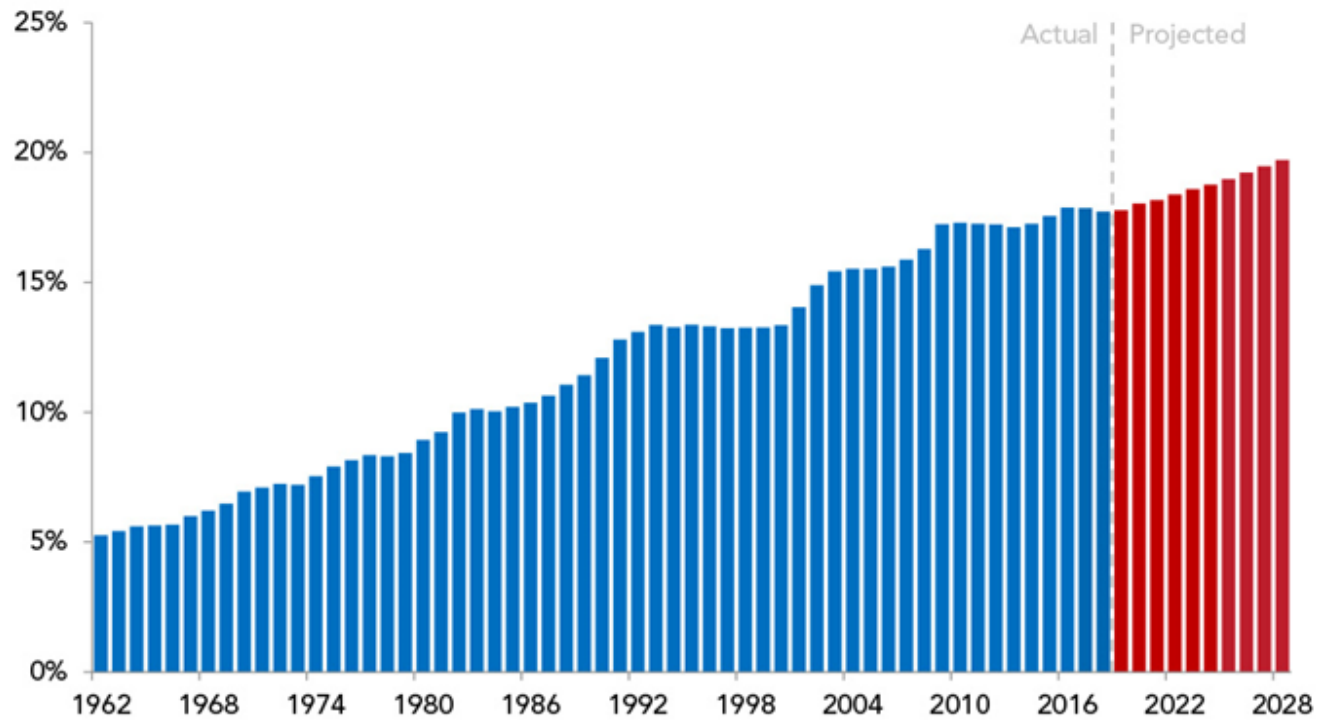


a dozen oranges  
would cost  
**\$134**

## The Rise of the Healthcare Consumer

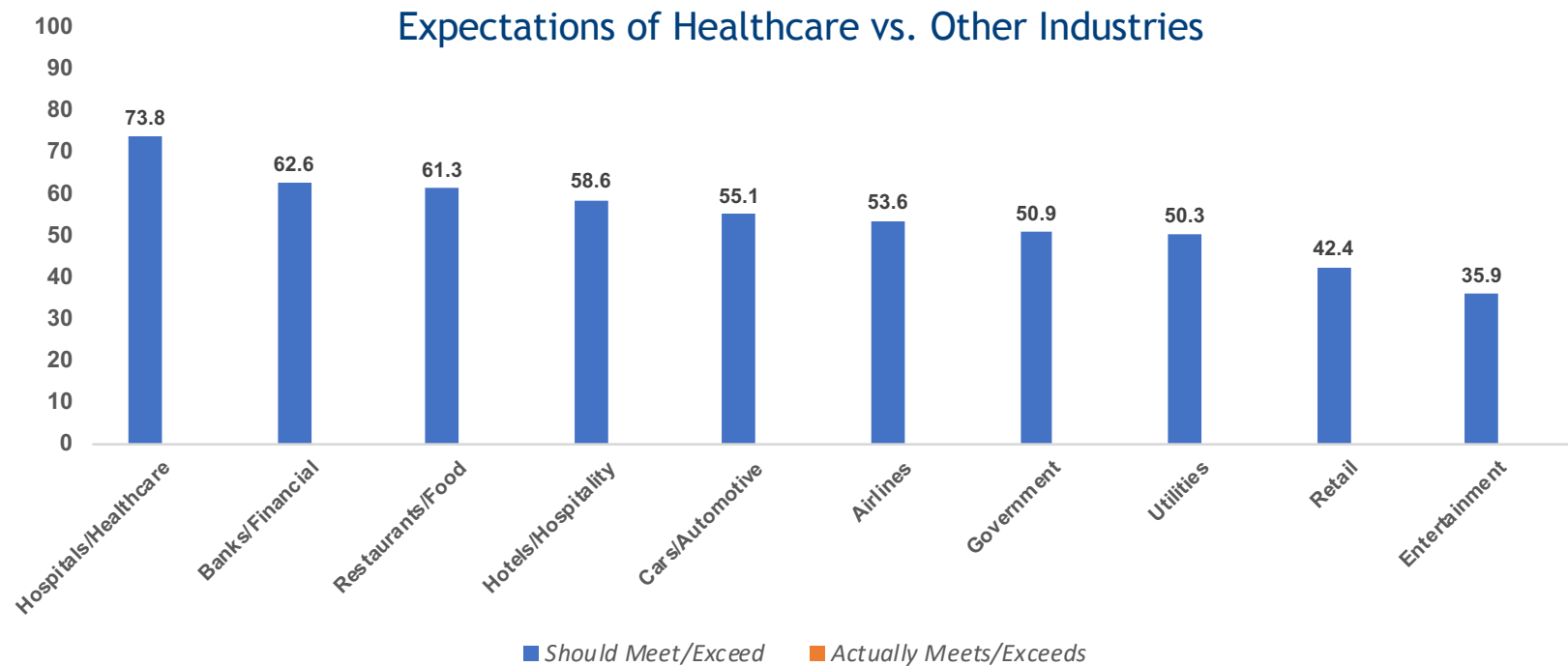
- Consumers have shouldered the growing burden of paying more for their healthcare.
- As true in any other industry: the more you pay... the more you expect in return.
- As a result, consumer expectations for healthcare and experiential frustration have also grown.

# National Health Expenditures (% of GDP)



Source: Peter G. Peterson Foundation, CMS National Health Expenditure Data, March 2020.

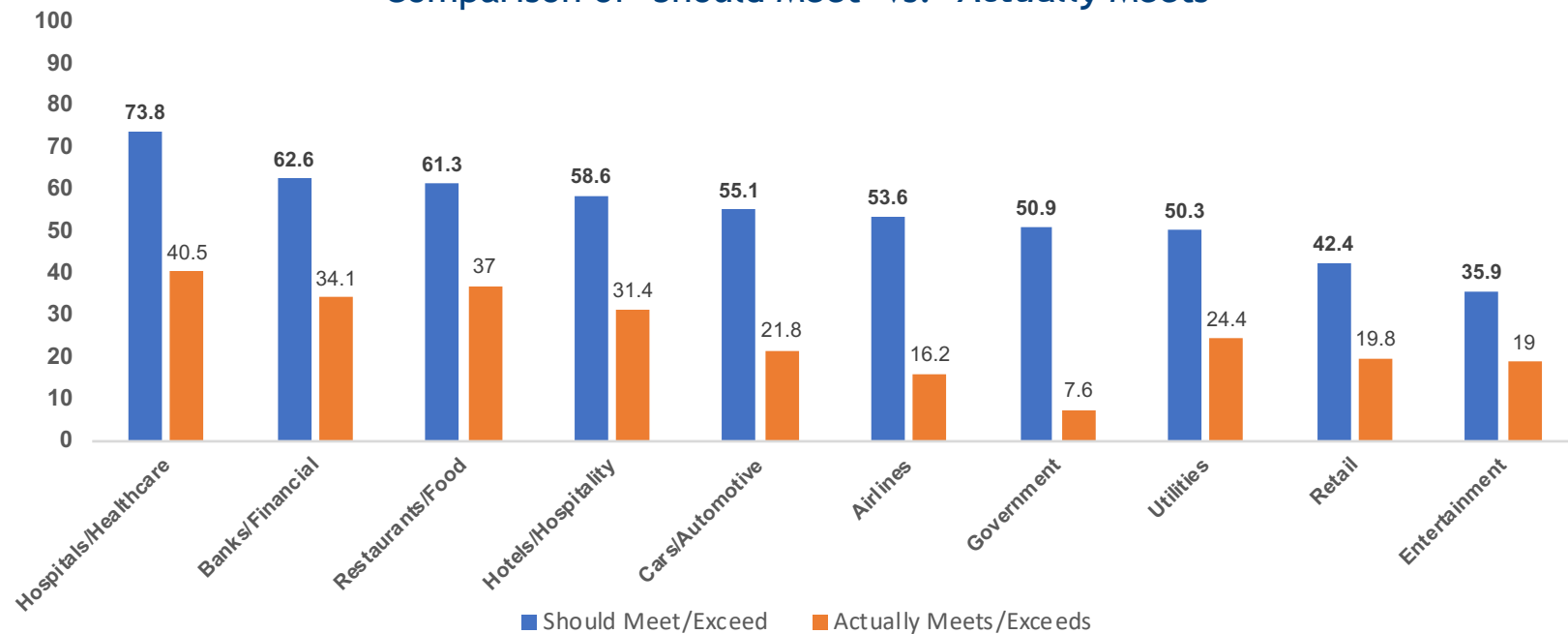
# What are consumers' expectations of healthcare?



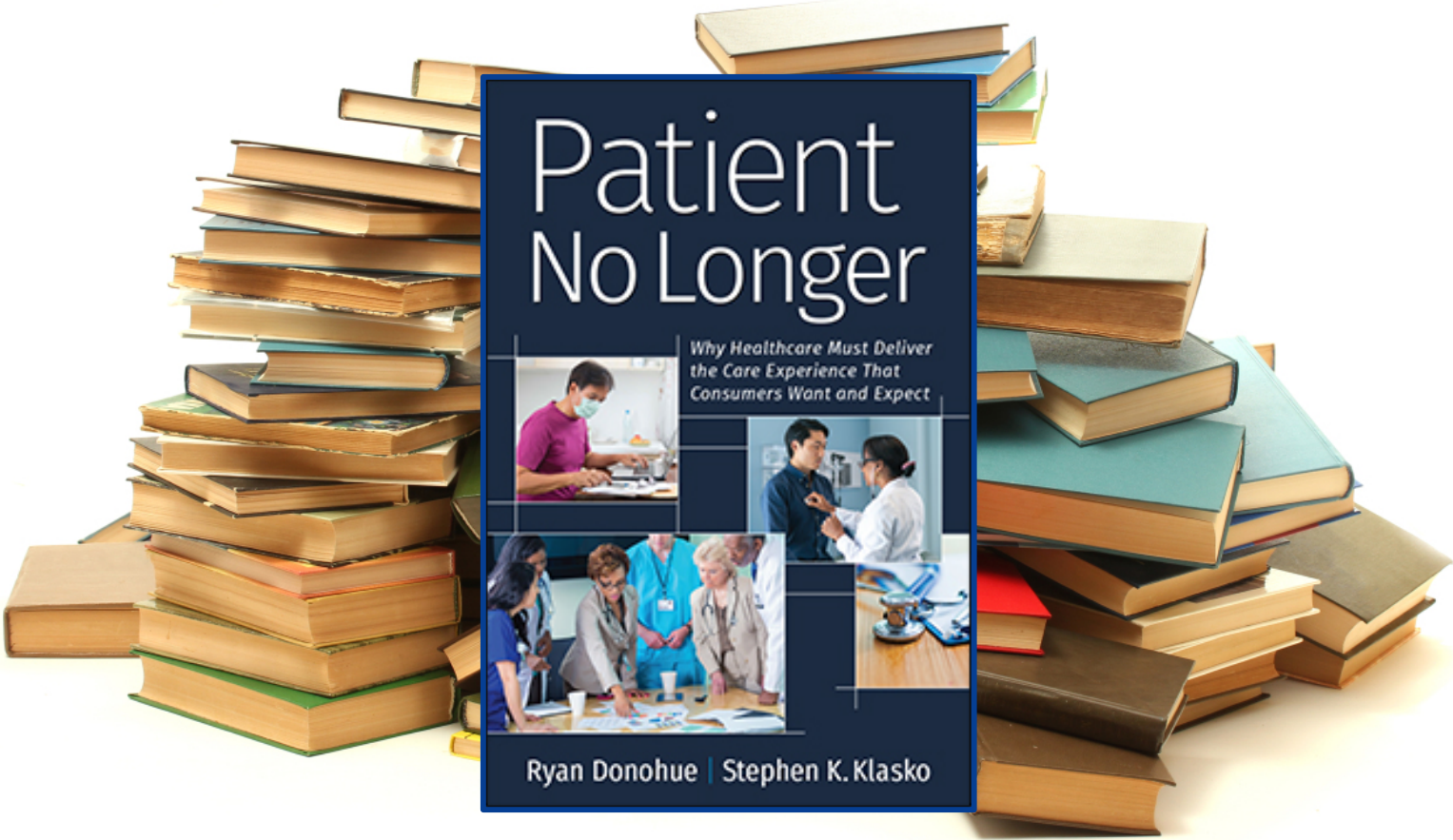
Source: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845.

# What are consumers' expectations of healthcare?

Comparison of 'Should Meet' vs. 'Actually Meets'



Source: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845.



## Polling Question



*What emotion is most prevalent to patients during a healthcare journey?*

- a) Anger*
- b) Relief*
- c) Confusion*
- d) Pure unadulterated dissatisfaction*





# UCSF Helen Diller Family Cancer Center





# Consumerism + COVID-19

## NRC Health's Study of COVID-19 Effects on Consumers

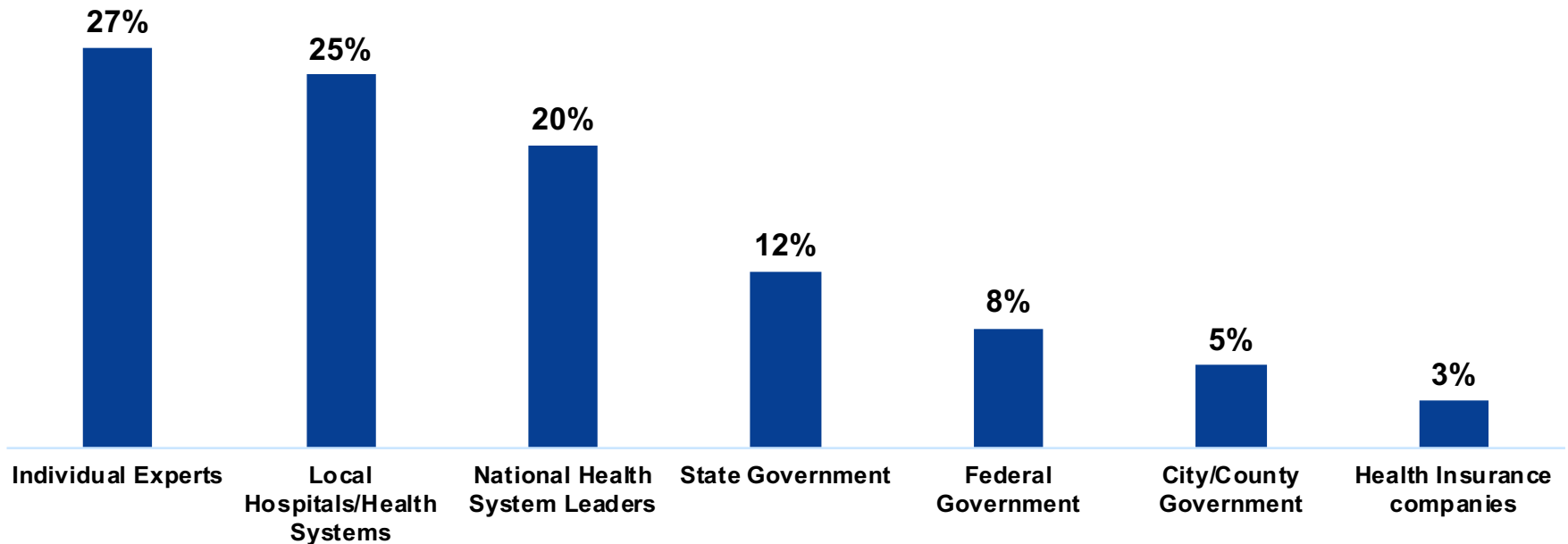
- Roughly **half** have delayed care in some form since March.
- Dental, primary, and specialty care most likely to be delayed.
- 7 in 10 deferrers cited COVID-19 in delaying their treatment.
  - Majority of the rest cite various financial concerns.
- 1 in 3 have participated in a virtual care visit since March.
- Of virtual patients: 3 in 4 were satisfied with their visit.

*Source: NRC Health's MARKET INSIGHTS study of healthcare consumers, 2020, n size = 2,000.*



Source: Jefferson Health, 2020.

## Who do you trust the most to handle COVID-19?



Source: NRC Health's MARKET INSIGHTS study of healthcare consumers, 2020, n size = 21,421.

# The Hybridization of Patient Experience



## Digital Medicine Growing as a Pathway to Care

- For consumers, screens are the new door.
- In healthcare, consumers are seeing the growing possibilities of online information and education.
- Older consumers are more active in digital health:
  - Average age of healthcare decision maker is 45.
  - Same age as consumers who use social media for healthcare purposes.
  - Roughly half of 65+ are aware of doctor ratings.
- Across all age groups, digital info is flourishing.



*Source: NRC Health's MARKET INSIGHTS study, 2010-2020, average annual n sizes vary from 208 (qual) to 278,824 (quant).*

# Telehealth: The Return of the House Call

When it comes to service, especially this year, consumers are expecting *you* to come to *them*:

- **35 percent** used telehealth services this year (15 percent in 2019).
- **75 percent** were satisfied with visit.
- **57 percent** are likely to schedule in the future (54 percent would see PA).
- **8 in 10** employers are now covering telehealth as a benefit.



*Source: NRC Health's MARKET INSIGHTS study, 2010-2020, average annual n sizes vary from 208 (qual) to 278,824 (quant).*



## VIRTUAL WAITING ROOM

# Ensure Social Distancing Amid COVID-19

The idea of waiting in a waiting room can be scary. Give patients the peace of mind they're looking for with a virtual waiting room. Our proven solution provides contactless check-in from your parking lot and can be up and running in 24 hours.

[FREE PHONE CONSULTATION](#)



## Polling Question



*Which factor predicted the likelihood of more satisfied patients?*

- a) Patient age*
- b) Patient gender*
- c) Geographic location*
- d) Number of experiences/touchpoints*

## Are Consumers Satisfied with Physical Experiences?

An alarming **81%** of consumers are unsatisfied with their healthcare experience - and the happiest consumers are those who interact with the system the least

**75%** of frequent healthcare consumers are frustrated

**48%** of all other healthcare consumers are frustrated



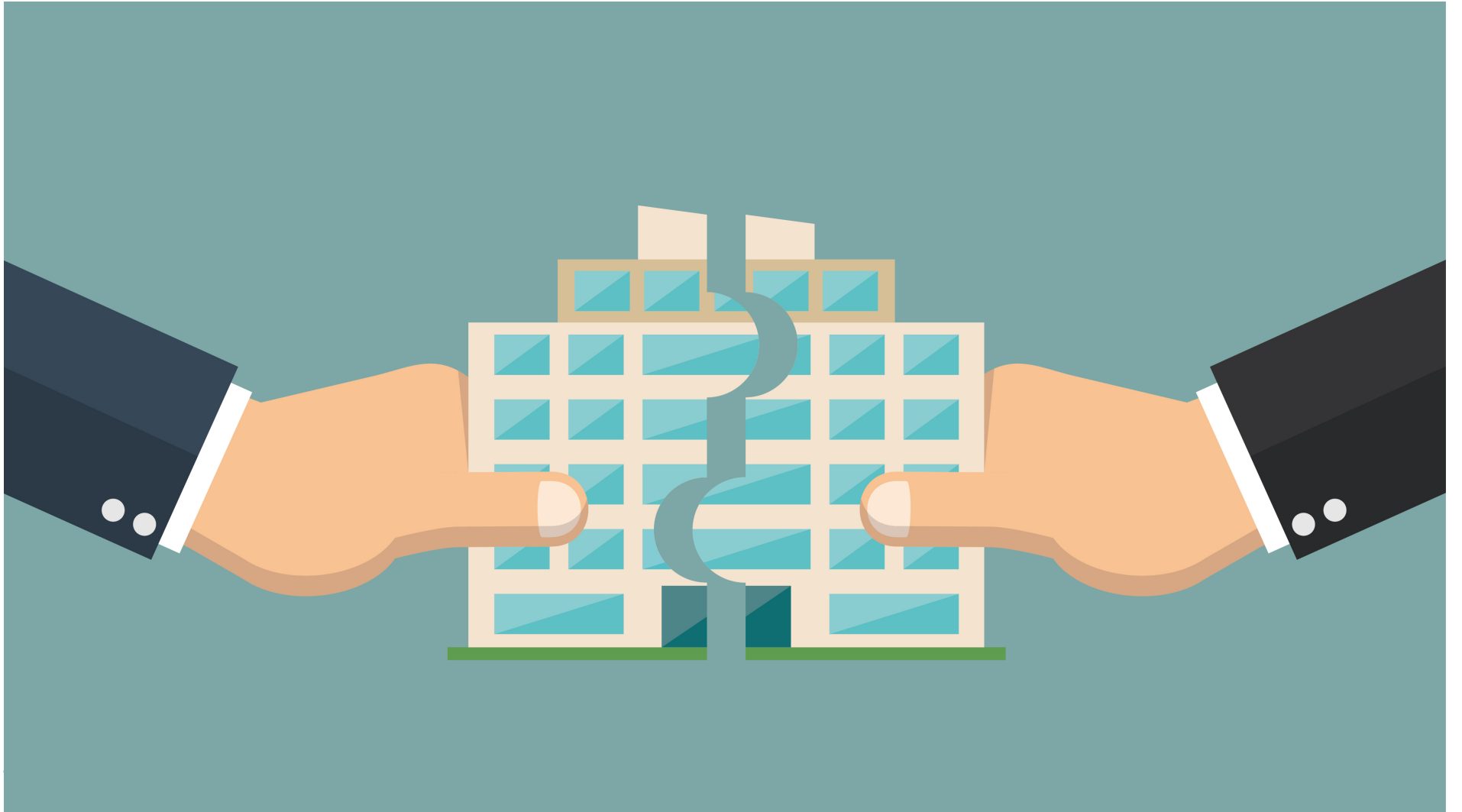
*Source: Camden Group, 2017; NRC Health's MARKET INSIGHTS study.*

# The Problem with Physical Patient Experiences

- Consumers lack familiarity with healthcare options:
  - In the average market, 3 in 5 consumers claim little to no knowledge of their providers; 1 in 5 cannot name a hospital.
- Health brands struggle to engage potential patients:
  - Consumers rarely anticipate PX, tune out “sick care” ads.
- Healthcare experiences are humbling for most:
  - 7 in 10 patients felt they had “no control” during care.
- Out-of-pocket costs have knocked consumers over:
  - Only 26 percent of households can comfortably cover deductible.
  - 2 out of 3 personal bankruptcies tied to medical issues.



Source: NRC Health's MARKET INSIGHTS study of healthcare consumers, 2010-2020, annual n sizes vary from 176 (qual) to 278,824 (quant); CNBC, 2019.



## Digital Health as a Relationship Builder

- Consumers want care providers to take a step toward them.
- Digital health presents the best opportunity to close the cognitive gap consumers experience with healthcare.
- Consumers who visited a provider Web site, social media page or experienced virtual care now consider those on-par with traditional physical patient experiences.



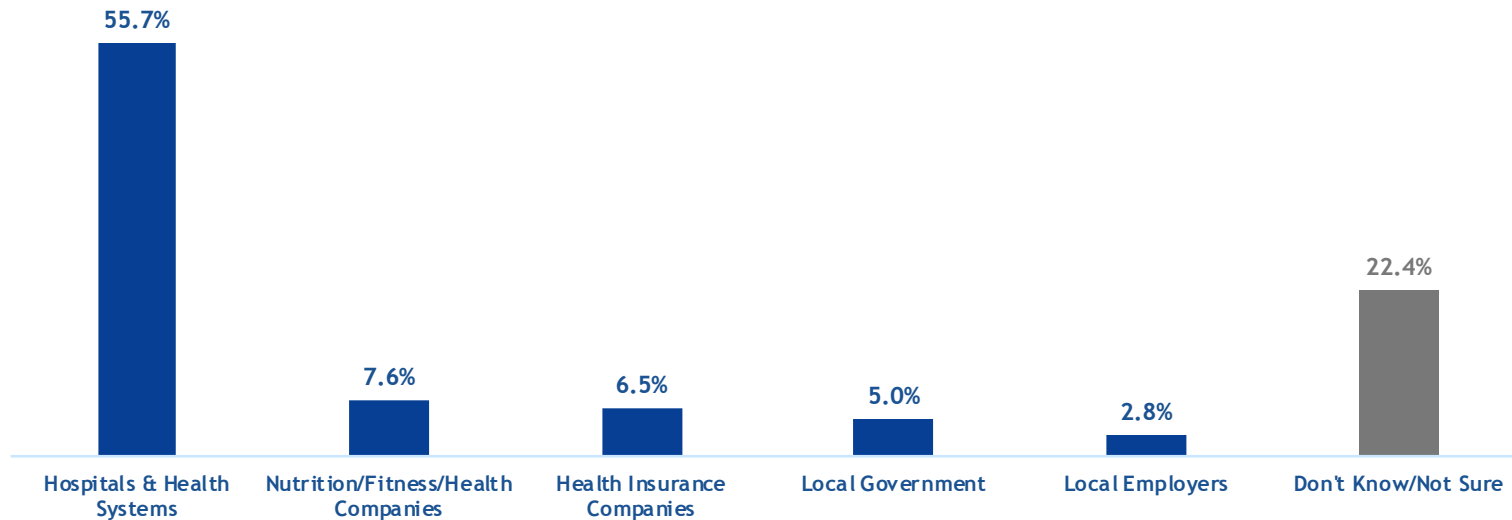
*Source: MobiHealth News, August 2020.*



# Post-Pandemic Strategy

# Bearing the Burden of Responsibility for Health

*Who is responsible for your community's health?*



Source: NRC Health's Market Insights Consumer Survey, nationwide, November-December 2018, n size = 44,159.

## Reshaping Perceptions

### *3 priorities emerge from a mountain of consumer data*

#### **Access**

*Start me on a quick, easy path to access the right care at the right time.*

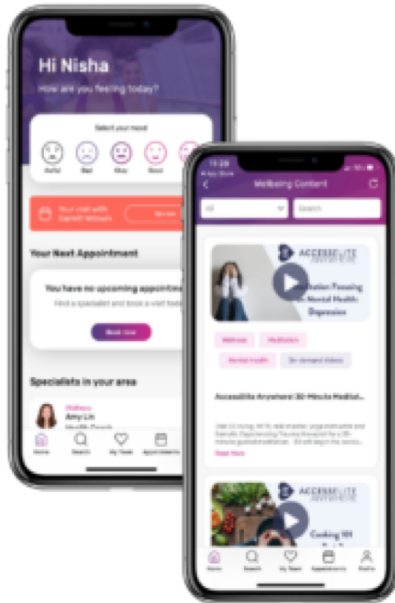
#### **Experience**

*Deliver an easy, frictionless experience that meets my expectations.*

#### **Value**

*Don't kill me with the bill – give me context, provide options, and be transparent.*

# AccessElite Health



- Complete healthcare access management
- Built around online scheduling
- Same day appointments available
- One-click booking through the app
- Dedicated chat or phone line before, during, or after an appointment

Questions about BayCare EasyPass™?



Brinn Curtiss

brinn.curtiss@baycare.org

Home

My Benefits

My Doctors

Account Settings

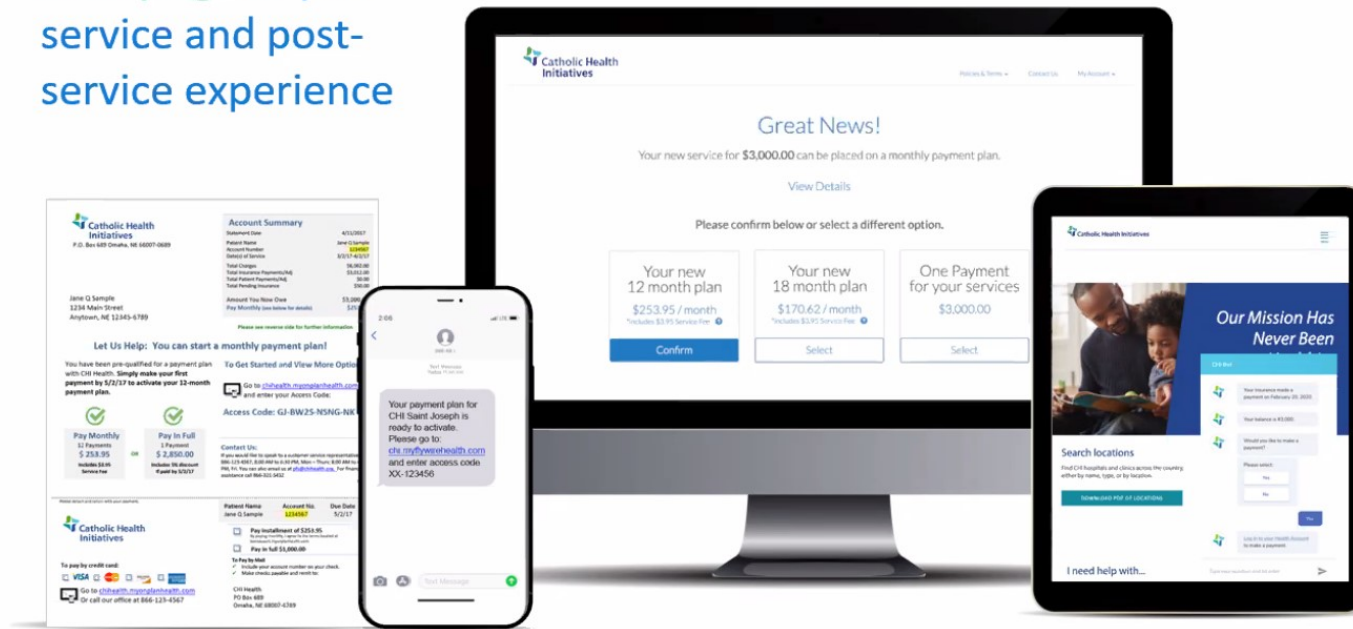
FAQ

Schedule BayCare  
Medical Services

## BayCare (Tampa, FL) Easy Pass

- Launched in 2017 via physician practice
- Two membership tiers available
- Multiple benefits offered
- Objective: make BayCare services so easy they become second nature and after repeated use loyalty is formed
- Highly positive feedback received so far

# Marrying the pre-service and post-service experience



← Pre-service — Point-of-service — Post-service →



## Reshaping Perceptions

### *3 priorities emerge from a mountain of consumer data*

#### **Access**

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## Polling Question



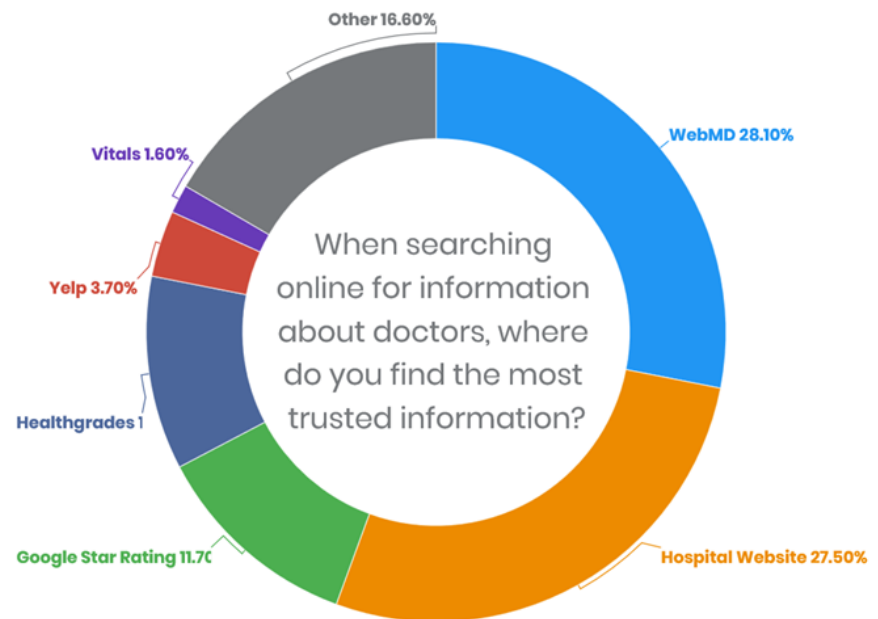
*When searching for care, which of the following do consumers trust the most?*

- a) Third-party doctor ratings*
- b) Mapping/directions to facility*
- c) Hospital/health system Web site*
- d) Electronical medical record access*



## Consumers Trust Your Web Site

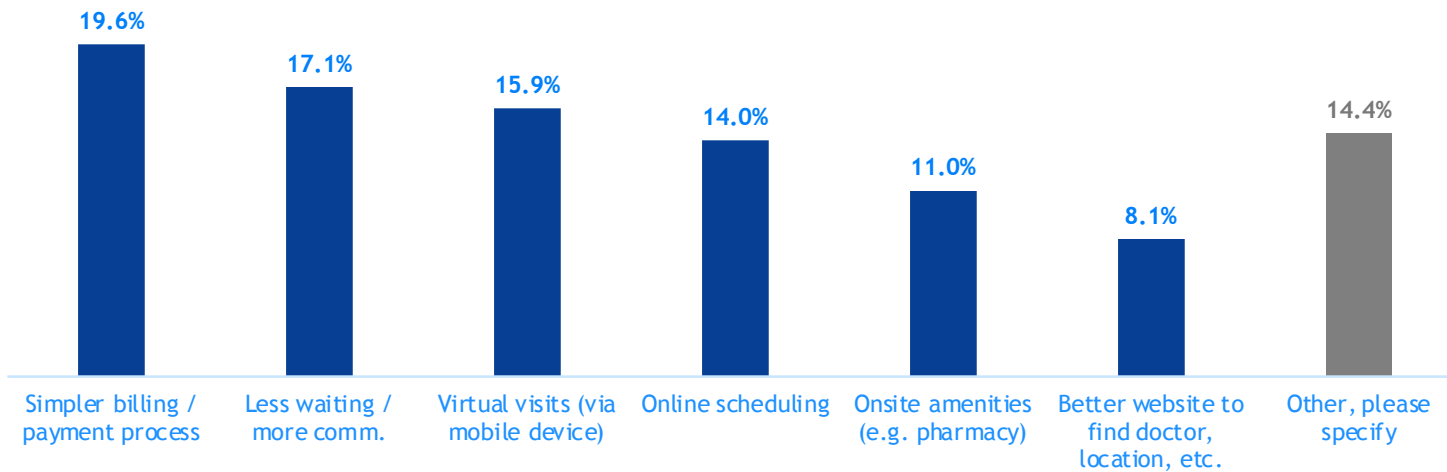
**27.5%** of Consumers say a **Hospital's Website** is the **Most Trusted** Online Source for Doctor Information



N = 46,962 | 2019 | NRC Health Market Insights National Study

# The Role of Virtual in Consumers' "Wish List"

*Which improvement should your provider pursue?*



Source: NRC Health's MARKET INSIGHTS consumer survey, nationwide, November-December 2018, n size = 44,159.

# HEALTHCARE WITH NO ADDRESS

Care, like everything else: Digital





## Five Ideas to Advance the Consumer Experience

- **Easy win:** pick an existing initiative that needs finishing.
- **Access Play:** buy/build a product that allows either easier telemedicine, online scheduling, or virtual waiting room.
- **Engagement Play:** do a brand audit of your virtual hospital and ensure all symbols/signage is consistent.
- **Value Play:** adopt a physician ratings/reviews platform.
- **Future Strategy:** integrate digital INTO the strategic plan.

## It's All about the Consumer Experience

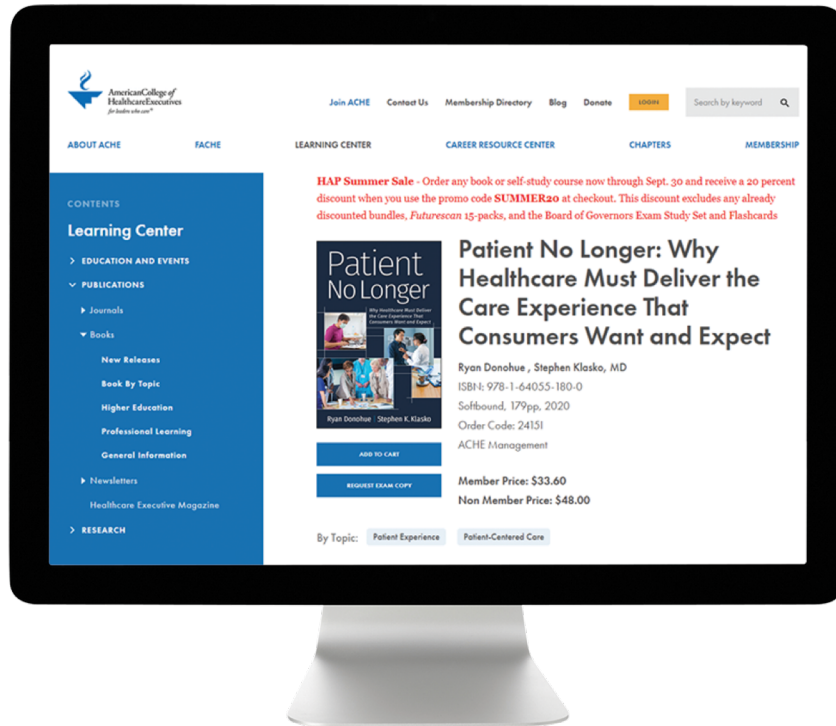
“We think of the  
*Experience*  
as our relationship with  
you from the time you  
visit our Web site or call  
us to when you arrive at  
your destination and all  
points in between.”



Gary Kelly  
CEO, Southwest Airlines



# Patient No Longer Now Available for Purchase





# Questions & Discussion

## Contact Us...



**Ryan Donohue**  
Strategic Advisor  
NRC Health  
(800) 388-4264  
[RDonohue@NRCHealth.com](mailto:RDonohue@NRCHealth.com)



A SERVICE OF  
**nrc**  
HEALTH

**The Governance Institute**  
1245 Q Street  
Lincoln, NE 68508  
(877) 712-8778  
[Info@GovernanceInstitute.com](mailto:Info@GovernanceInstitute.com)