

Patient No Longer

Reimagining the Consumer Journey of Care

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Roadmap

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

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Patient No Longer

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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)*

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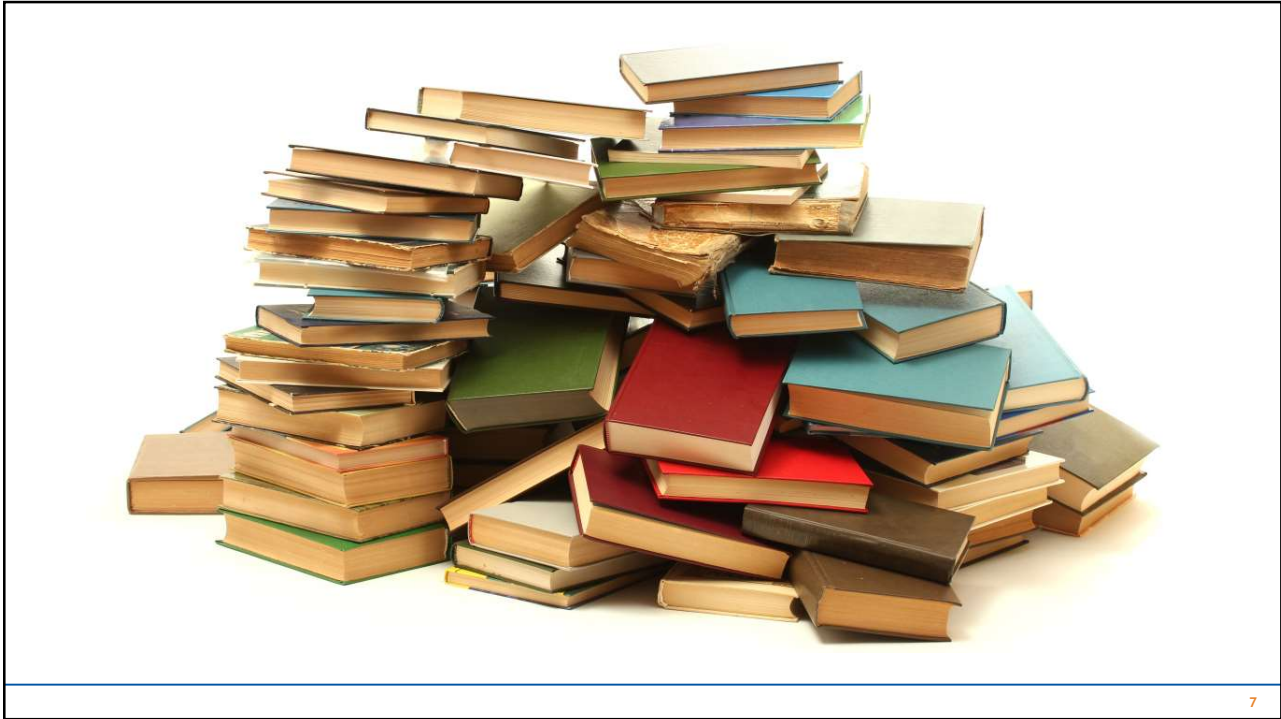
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The Legacy of Harvey & Jean Picker



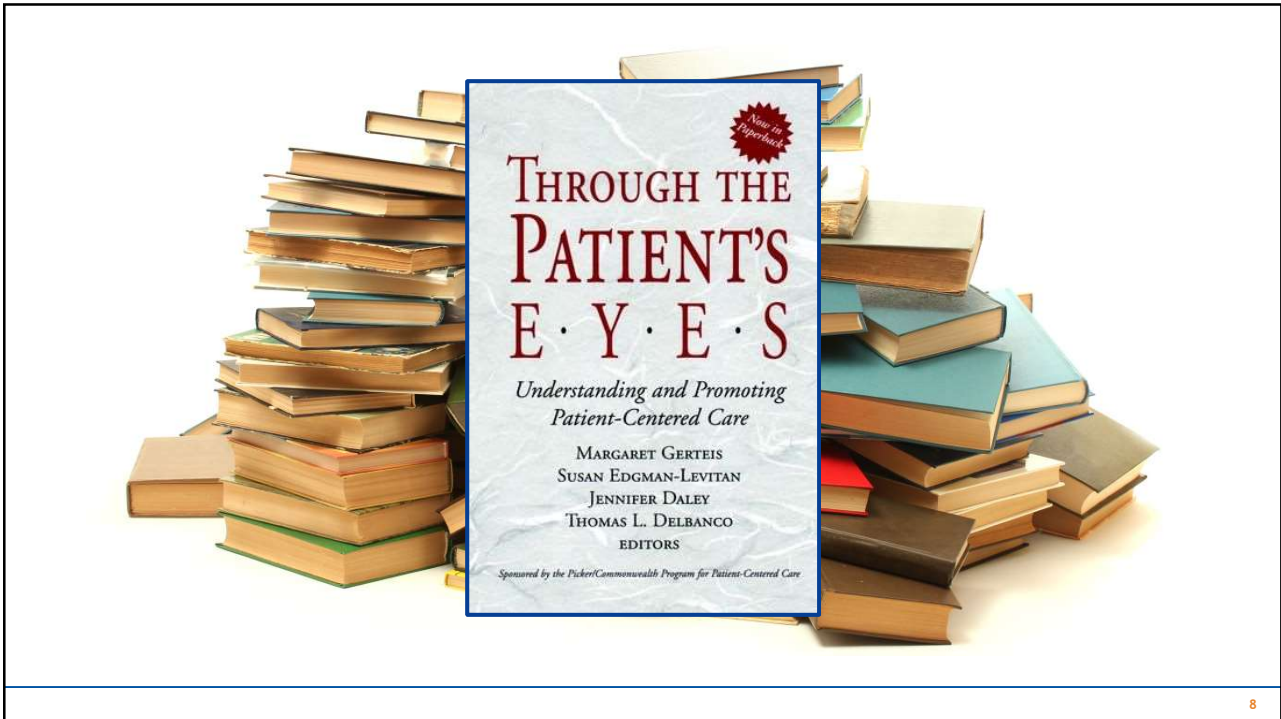
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Eight Dimensions of Patient-Centered Care

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

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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

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The Rise of Consumerism in Healthcare

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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

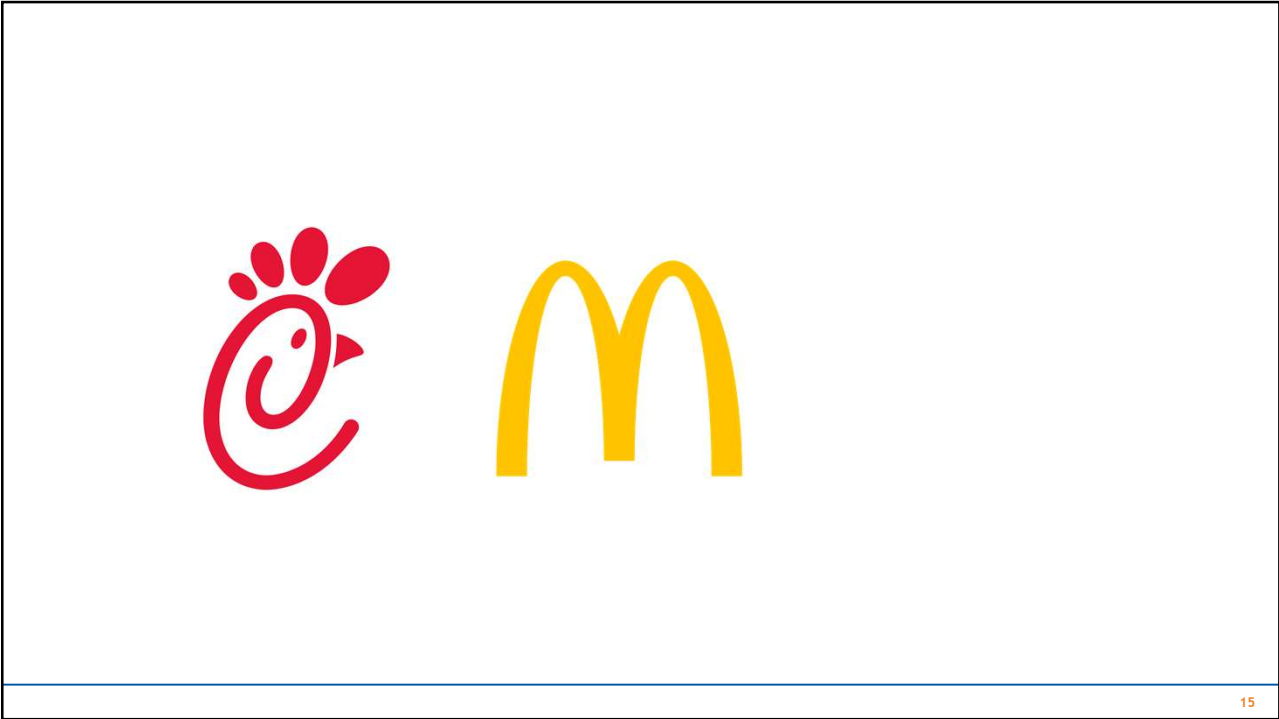
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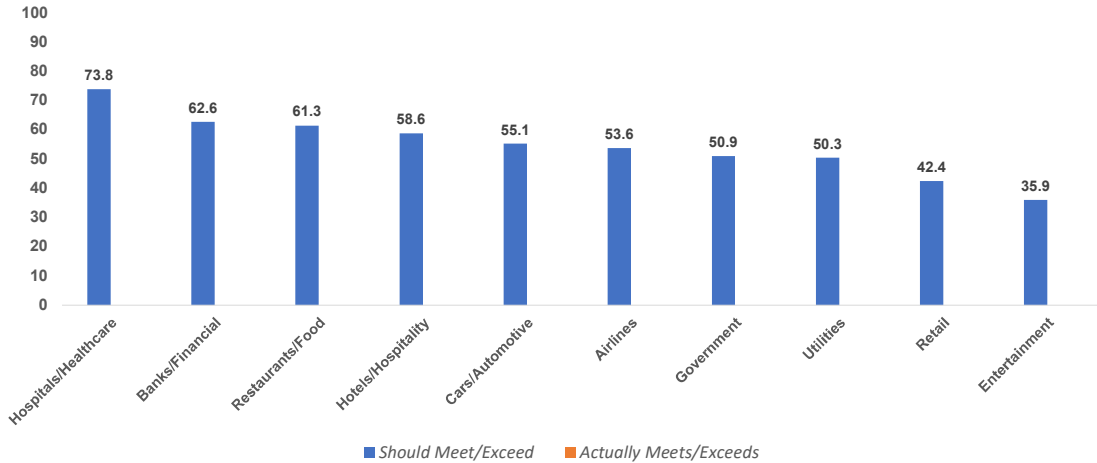


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Expectations of Healthcare vs. Other Industries

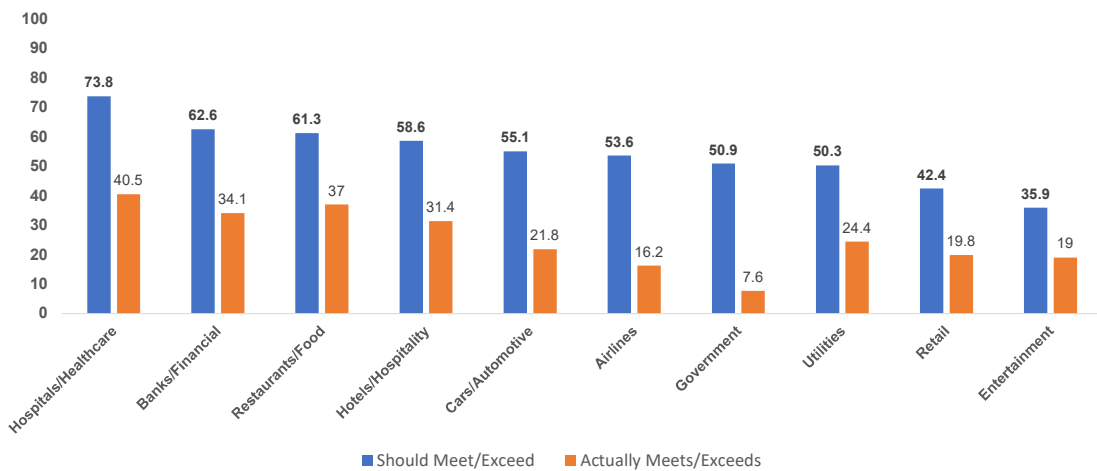


SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845

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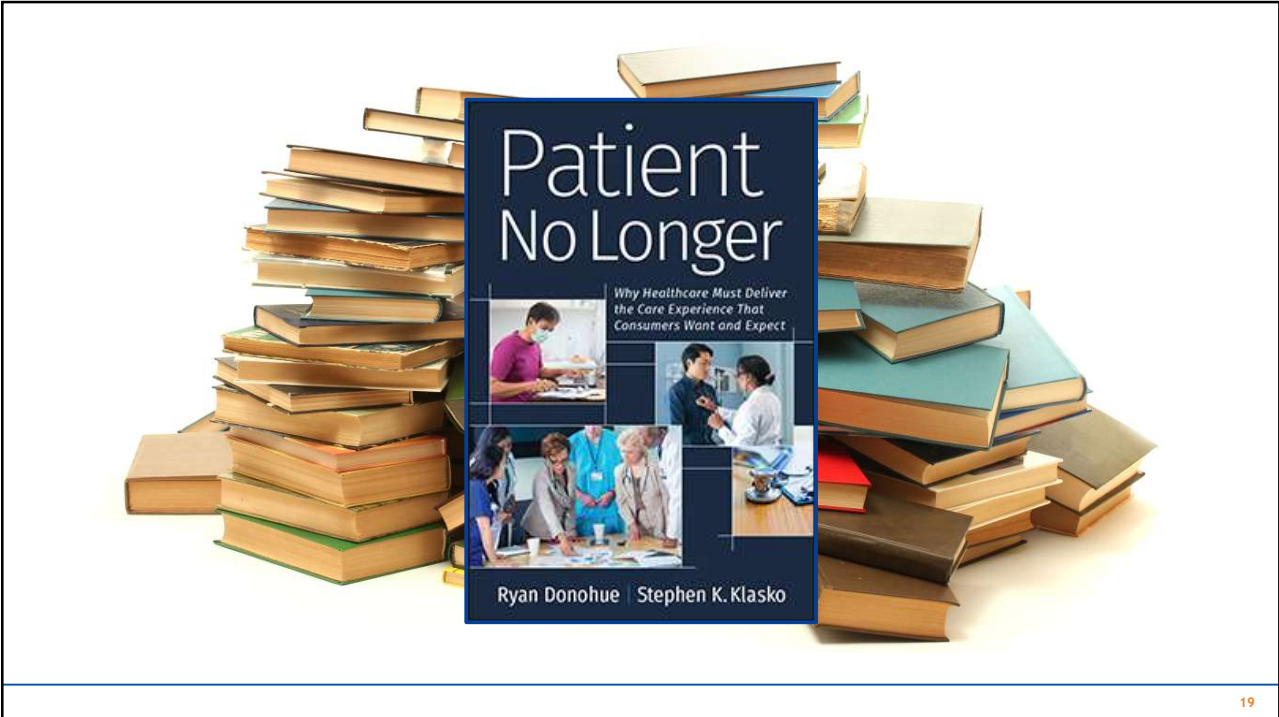
Comparison of 'Should Meet' vs. 'Actually Meets'



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

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UCSF Helen Diller Family Cancer Center



Consumerism + COVID-19

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Of patients displaced into telehealth in 2020, what percentage were satisfied with their experience?

- a) 100 percent*
- b) 75 percent*
- c) 50 percent*
- d) 19 percent*

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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: more satisfied than with physical visits

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

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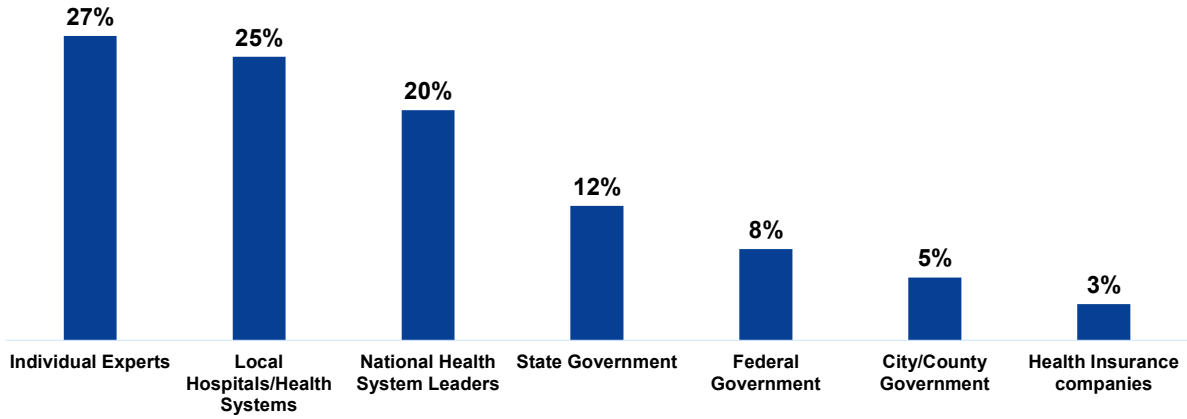


SOURCE: Jefferson Health, 2020

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



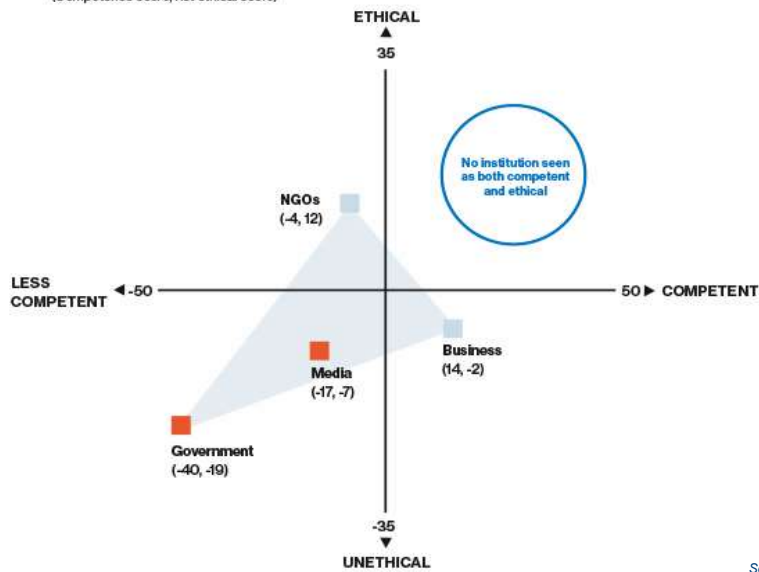
SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, 2020, n size = 21,421

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Dimensions of trust

(Competence score, net ethical score)



Source: Edelman Trust Barometer, 2020

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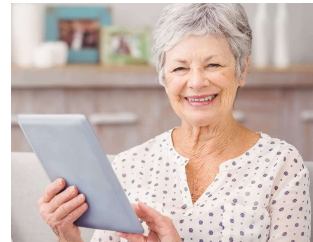
The Hybridization of Patient Experience

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Digital Medicine IS Medicine. Period.

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



SOURCE: National Research Corporation's MARKET INSIGHTS study, 2010-2020, average annual n sizes vary from 208 (qual) to 278,824 (quant)

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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: National Research Corporation's MARKET INSIGHTS study, 2010-2020, average annual n sizes vary from 208 (qual) to 278,824 (quant)

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Jellyfish HEALTH

VIRTUAL WAITING ROOM SOLUTIONS ▾ ABOUT ▾ RESOURCES ▾

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

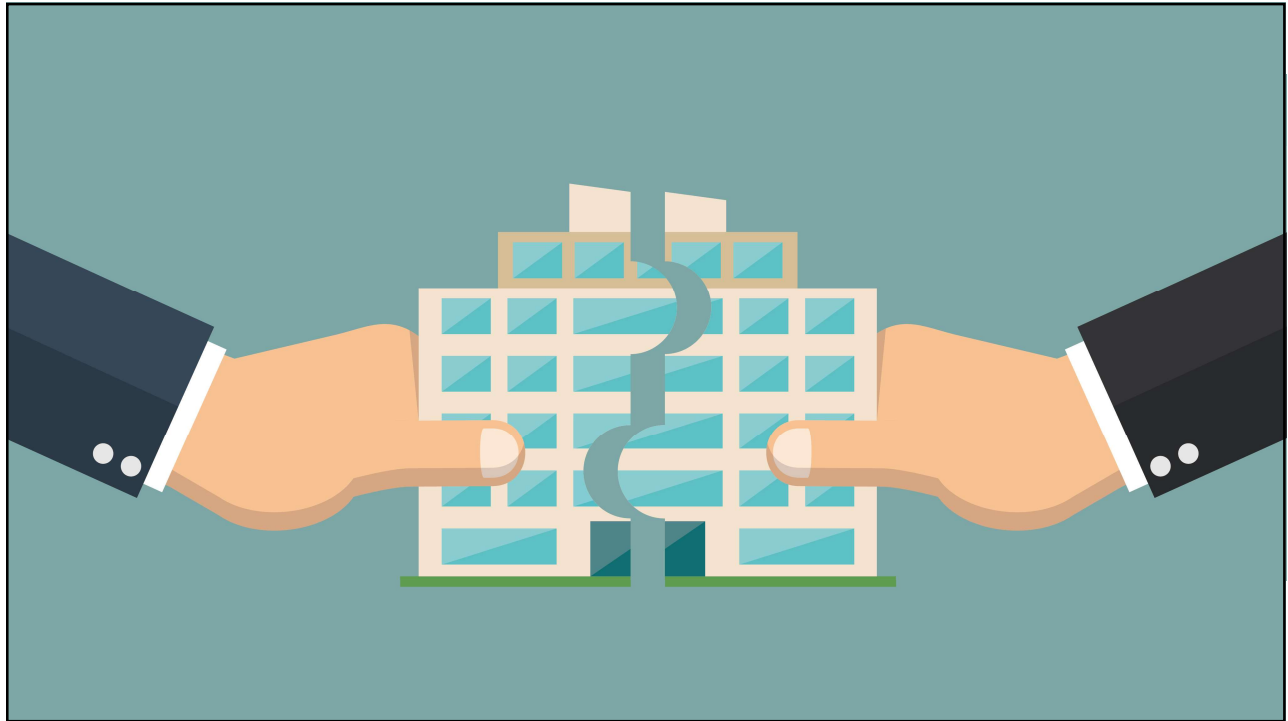
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? *Which factor predicted the likelihood of more satisfied patients?*

- a) Patient Age*
- b) Patient Gender*
- c) Geographic Location*
- d) Number of Experiences/Touchpoints*

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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 website, social media page or experienced virtual care now consider those on-par with traditional physical patient experiences



SOURCE: MobiHealth News, August 2020

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Post-Pandemic Strategy

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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

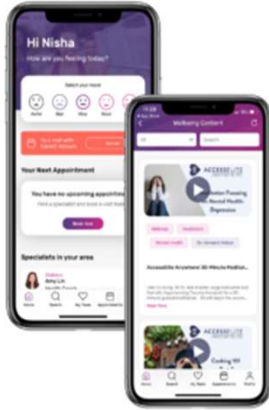
Deliver an easy, frictionless experience that meets my expectations

Value

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

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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

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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

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Marrying the pre-service and post-service experience

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

flywire

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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

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

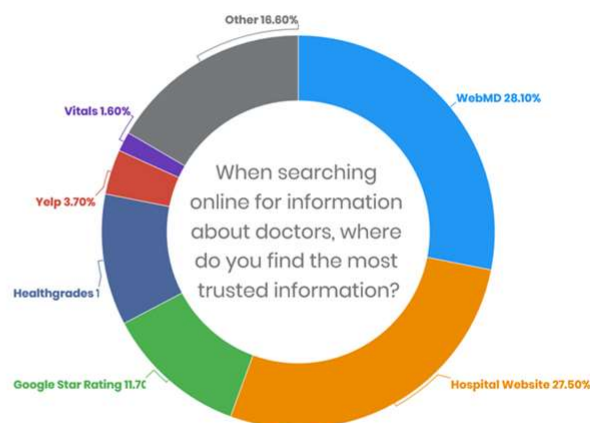
- a) Third Party Doctor Ratings*
- b) Mapping/Directions to Facility*
- c) Hospital/Health System Website*
- d) Electronical Medical Record Access*

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Consumers Trust Hospital/Health System Websites

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

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COVID VACCINATION INSIGHTS

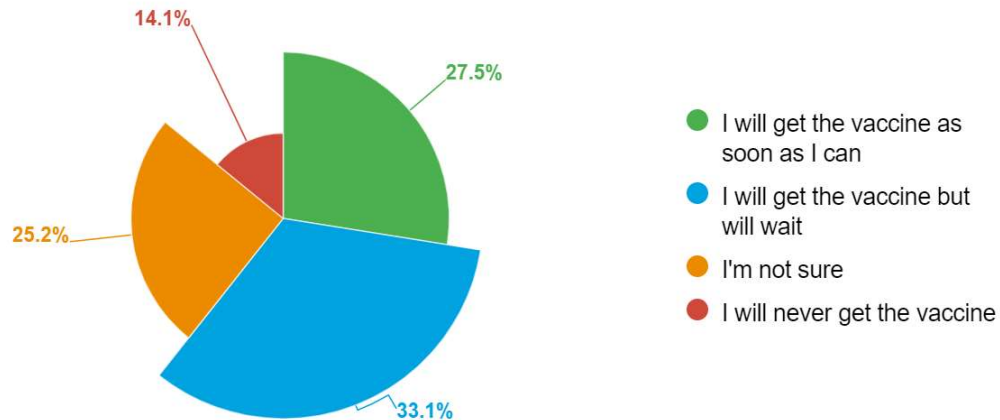
October - November 2020



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How likely are you to get the COVID-19 vaccine when it becomes available to you?

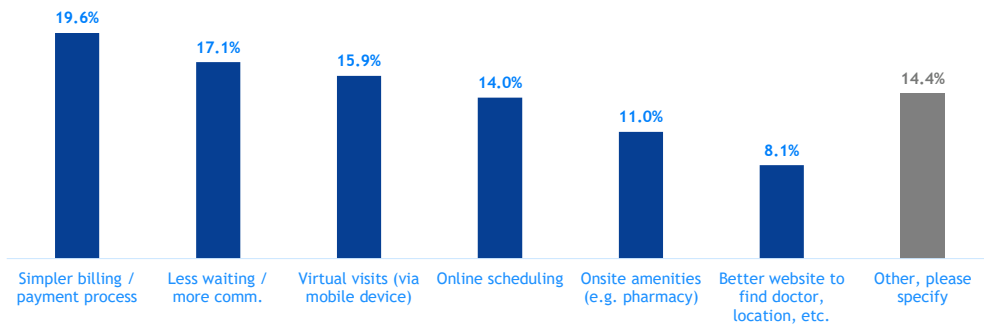
October & November 2020



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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

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Five Ideas to Reimagine the Journey of Care

- **Easy win:** pick an existing consumer-facing initiative to finish
- **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

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It's all about the Customer Experience

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



Gary Kelly
CEO-Southwest Airlines

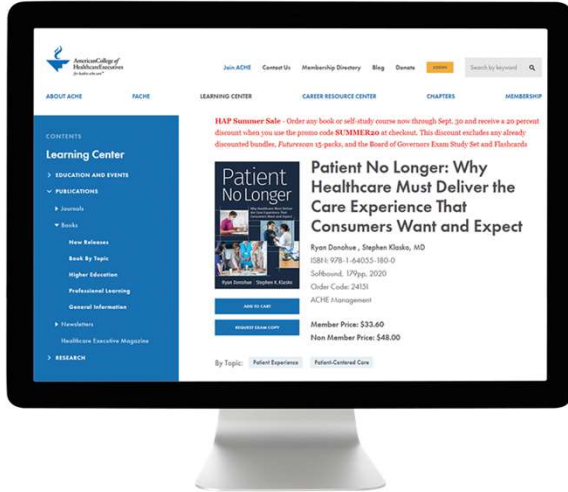
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Patient No Longer - Now Available for Purchase



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Discussion

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