

A Brave New World

Exploring Healthcare Through the Eyes of Post-COVID Consumers

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Session Roadmap

- *Patient No Longer*
- The Rise of Healthcare Consumerism
- The Reimagination of Care Based on Consumer Need
- Post-Pandemic Strategy for Boards
- Discussion

Patient No Longer



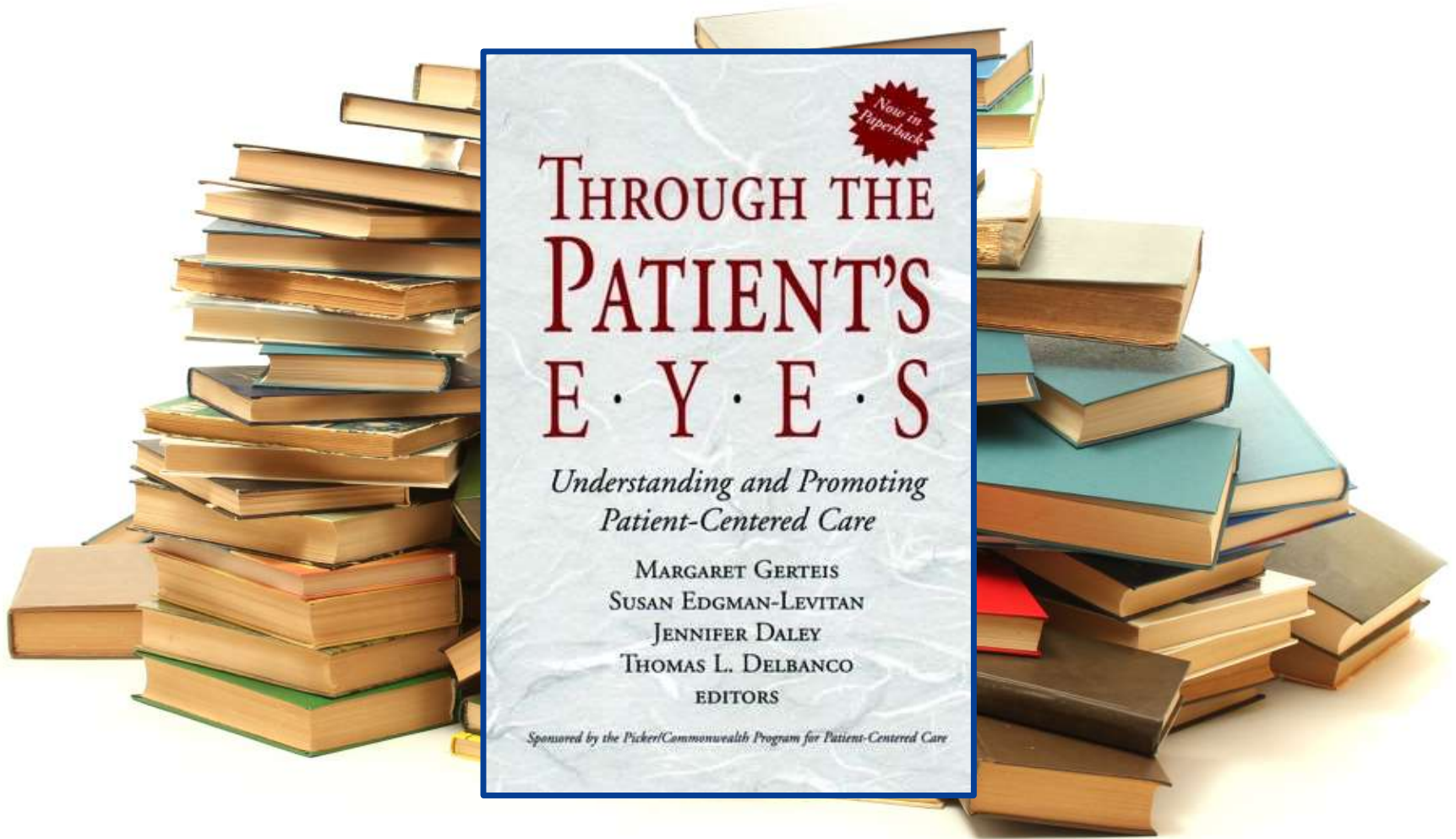


Based on the Picker teachings, which era is the most patient-centered to date?

- 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





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THROUGH THE PATIENT'S E · Y · E · S

*Understanding and Promoting
Patient-Centered Care*

MARGARET GERTEIS
SUSAN EDGMAN-LEVITAN
JENNIFER DALEY
THOMAS L. DELBANCO
EDITORS

Sponsored by the Picker/Commonwealth Program for Patient-Centered Care

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

A Quarter Century of Patient-Centered Care

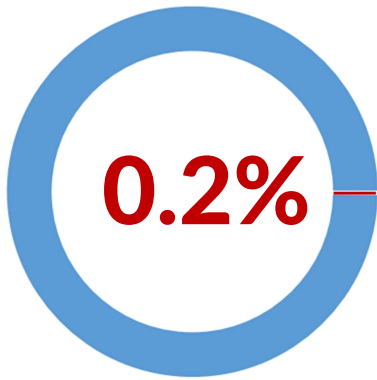
- The Eight Dimensions grew in popularity
- To doctors: treat the disease *and* the person
- Industry shifted to HCAHPS and public reporting
- The gravel road from volume/fee-for-service to value
- An incredible shift in risk to regular people

The Rise of Consumerism in Healthcare

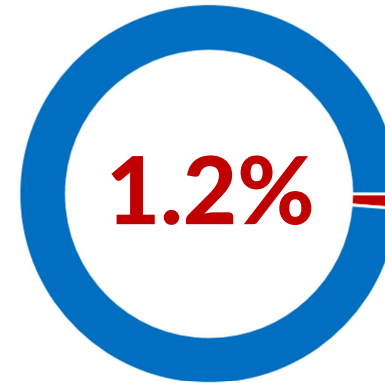




The Red Sliver: How Often We Receive Care



99.8% of life happens beyond the outpatient setting*

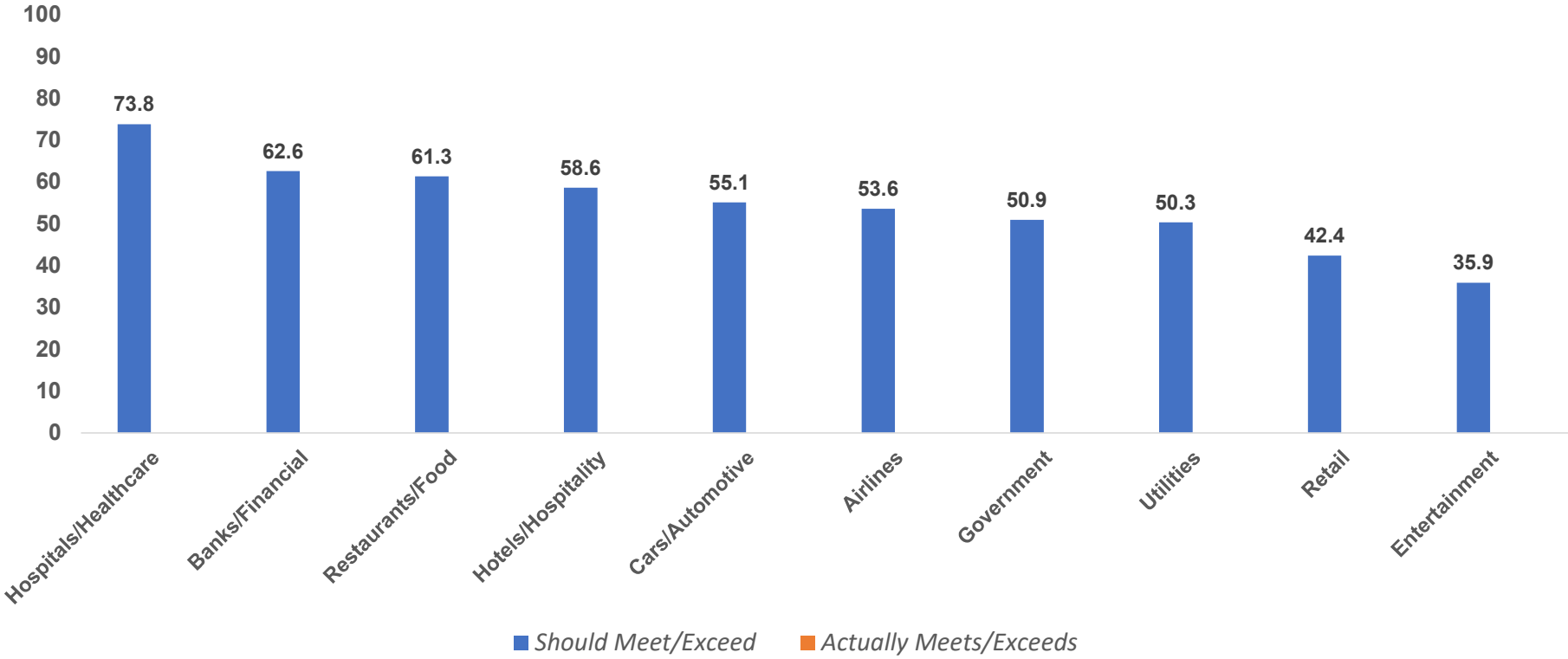


98.8% of life happens beyond the inpatient setting**

*16 waking hours/day x 365 days/year vs one 15-minute visit every week of the year

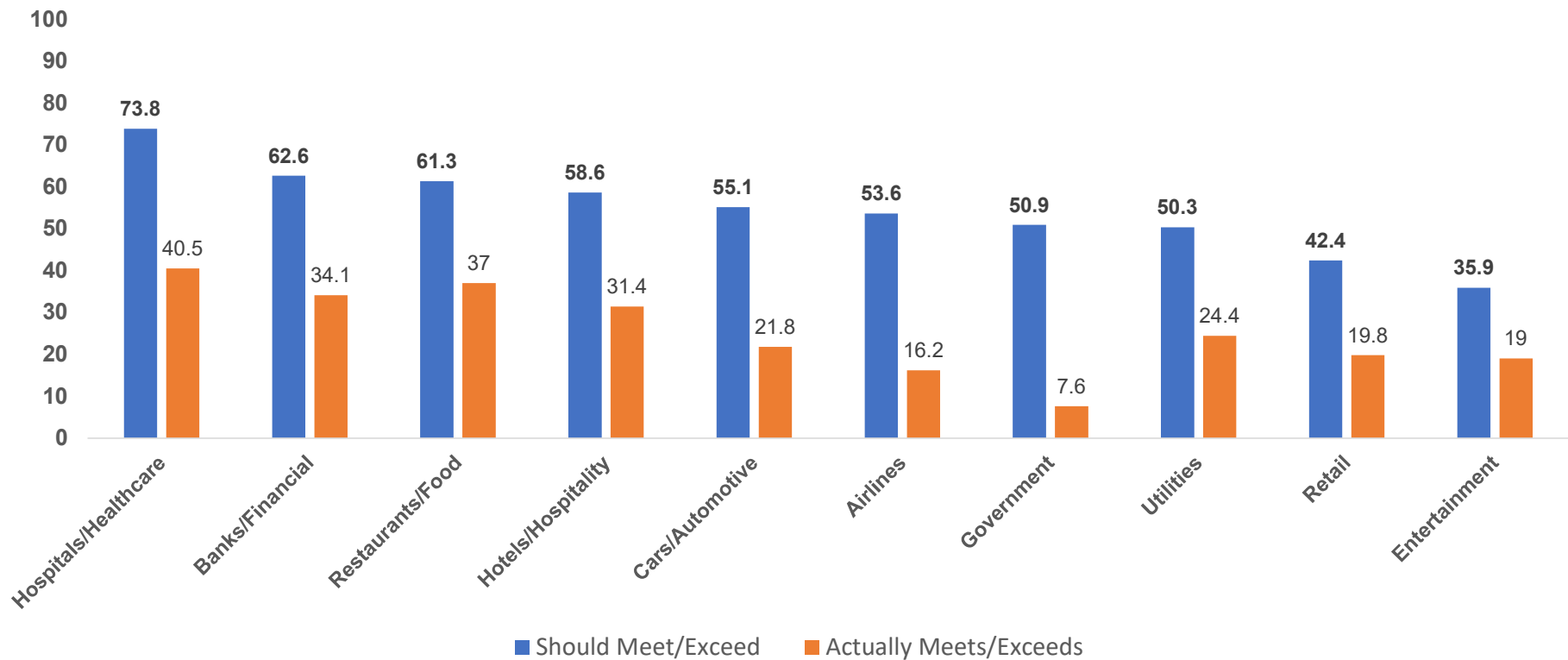
**365 days/year vs one hospital stay in a year at the national average LOS of 4.5 days

Expectations of Healthcare vs. Other Industries

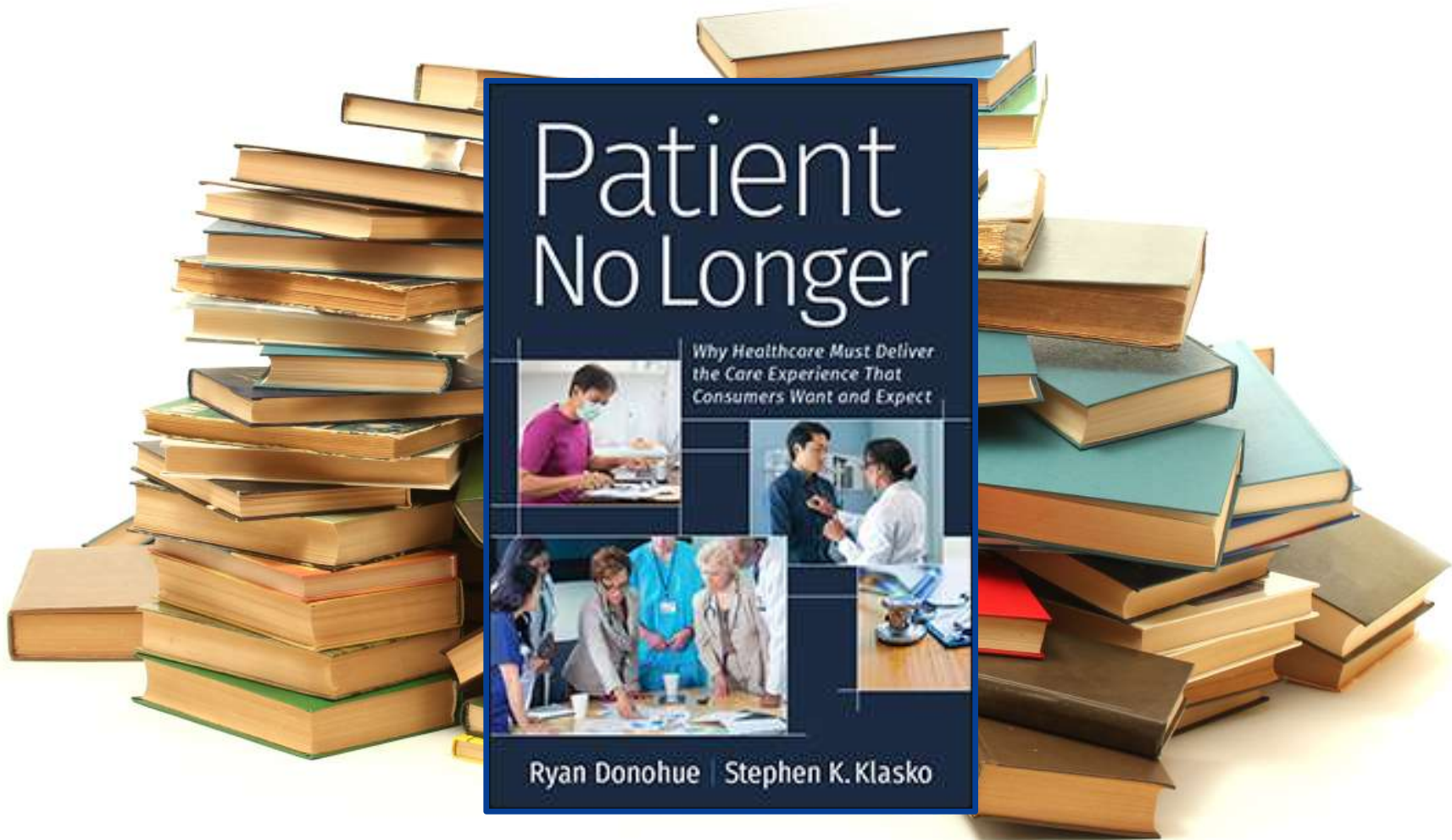


SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845

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



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



Ryan Donohue | Stephen K. Klasko



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

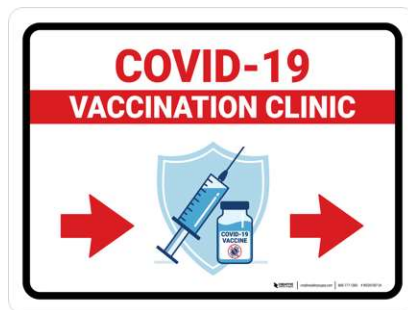
a) Anger

b) Relief

c) Confusion

d) Pure Unadulterated Dissatisfaction



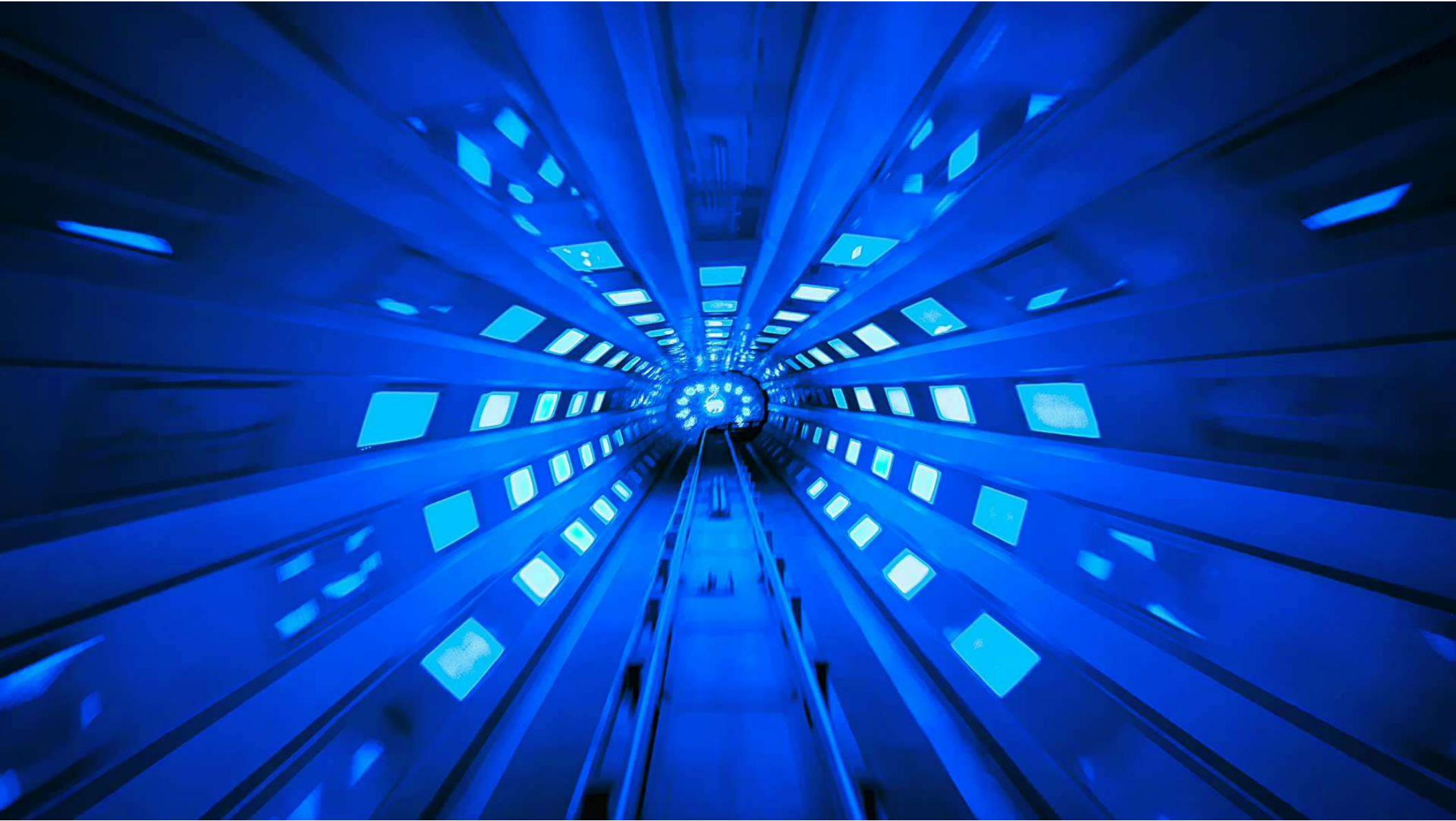




Outside Healthcare

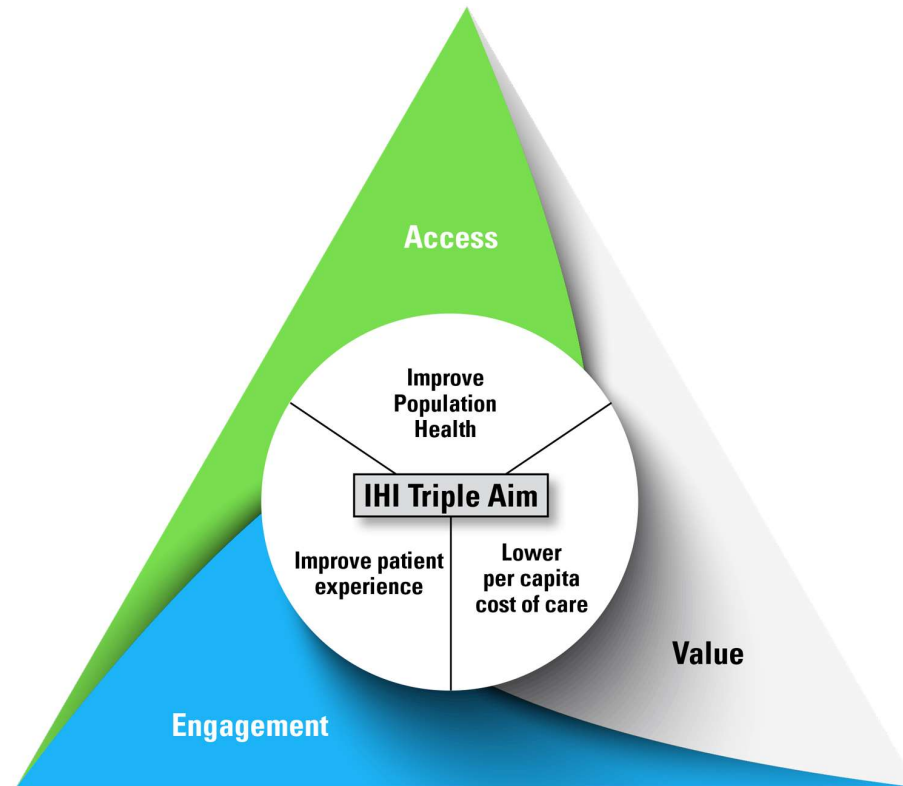






The Reimagination of Care (based on consumer need)

The “Consumer Edition” of the Triple Aim

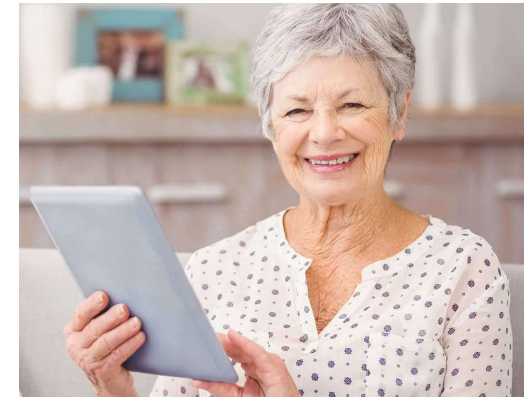


“Loved virtual because I did not have to take time off work for driving and a waiting room. Very efficient and convenient.”

– Consumer in Indiana

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 & education
- 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



Virtual Health: The Return of the House Call

When it comes to service - especially this year - consumers are now expecting *you* to come to *them*

- **35 percent** used telehealth services in 2020 (Up from 15 percent in 2019)
- **74 percent** were satisfied with visit
- **57 percent** are likely to schedule telemedicine in the future
 - 54 percent would see PA/NP
- **8 in 10** employers are now covering telehealth as a benefit

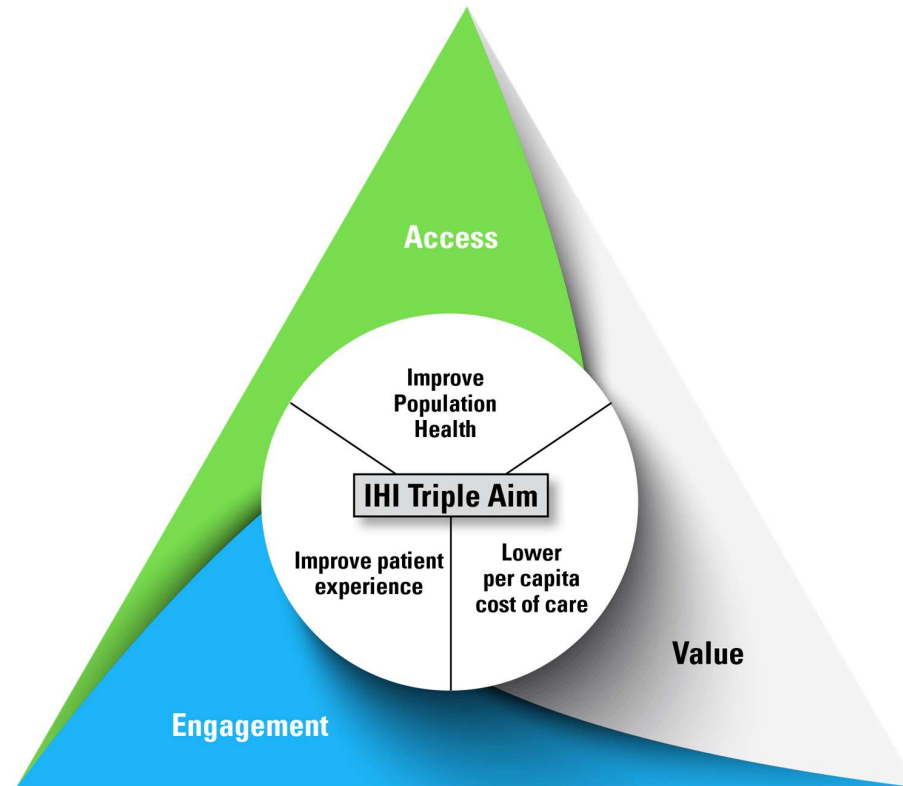


HEALTHCARE WITH NO ADDRESS

Care, like everything else: Digital



The “Consumer Edition” of the Triple Aim



"Good to be back in the office for visits. Very informative visit. It was so nice and comfortable to be with the doctor and nurses after such a long time with no physical contact."

- Consumer in Texas

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

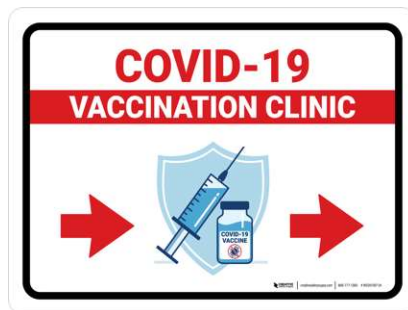
48% of all other healthcare consumers are frustrated



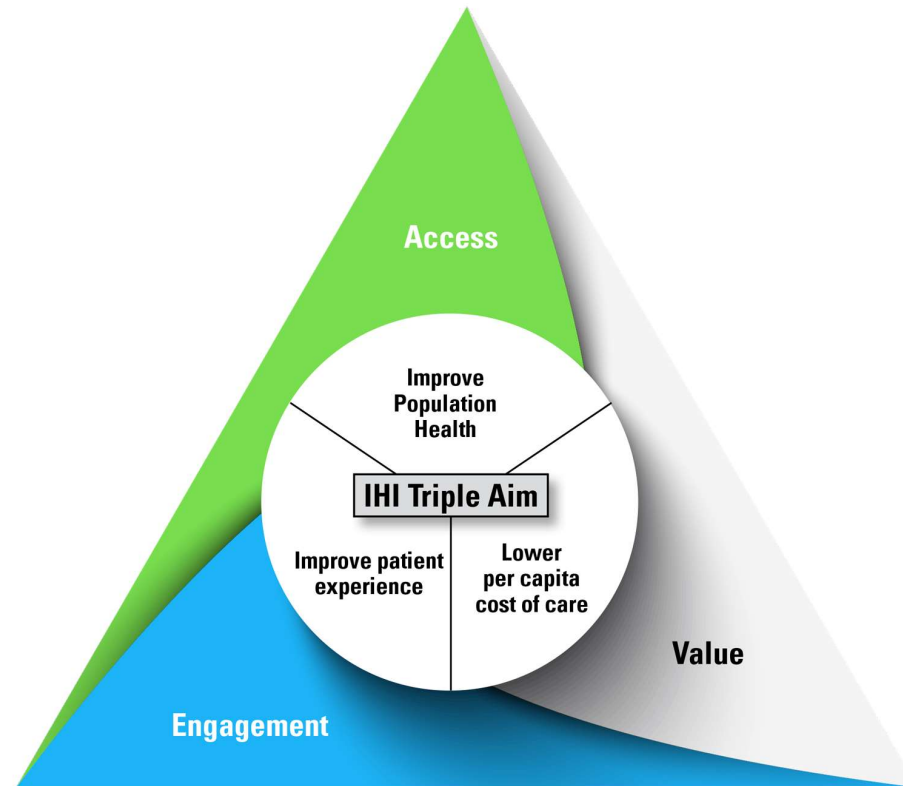


Which factor predicted the likelihood of more satisfied patients?

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



The “Consumer Edition” of the Triple Aim



Source: Institute for Healthcare Improvement (IHI), NRC Health



Digital Experiences that Simplify Receiving Care



Jacqui's son wakes at 3 a.m. with a fever. She comforts him, then quickly **schedules an appointment online** for him later that day before going back to sleep herself.



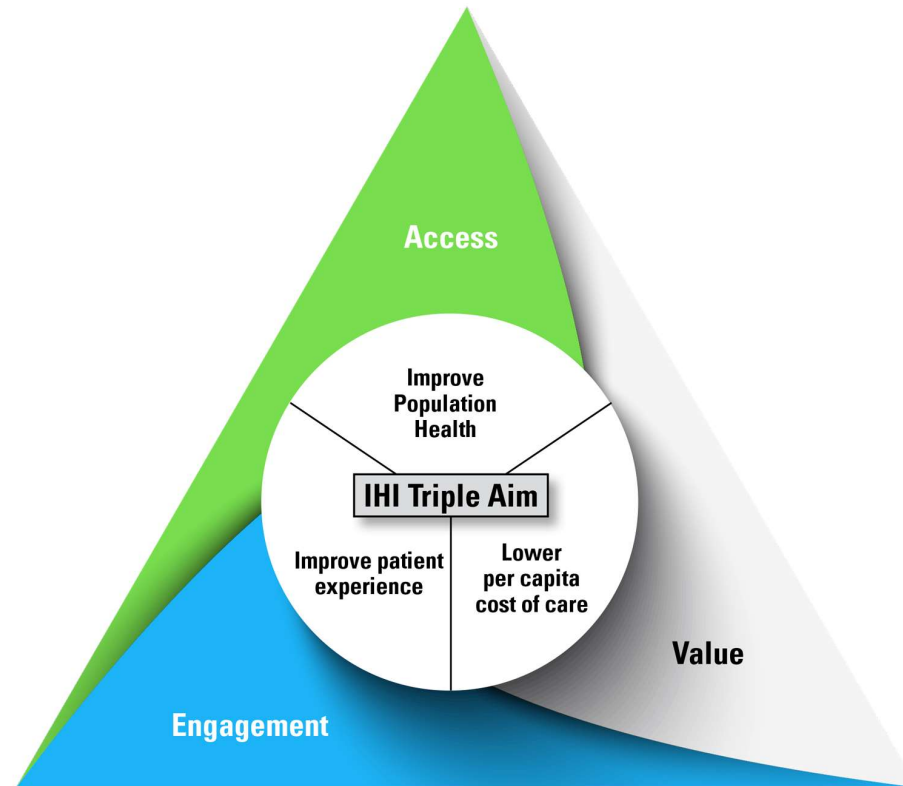
Every second of Bronson's day counts. So he **checks into his appointment remotely** to see if his doctor is on time; if she isn't, he knows he can squeeze in a few more emails.



What's going on with Dad? This family already knows thanks to **status boards** that update them in real time while they wait.

Better Experiences, Improved Loyalty

The “Consumer Edition” of the Triple Aim



“The doctor took the time to address all my priority questions, explore strategies to address particular concerns and most importantly, approached me as a unique person.”

—Consumer in Colorado

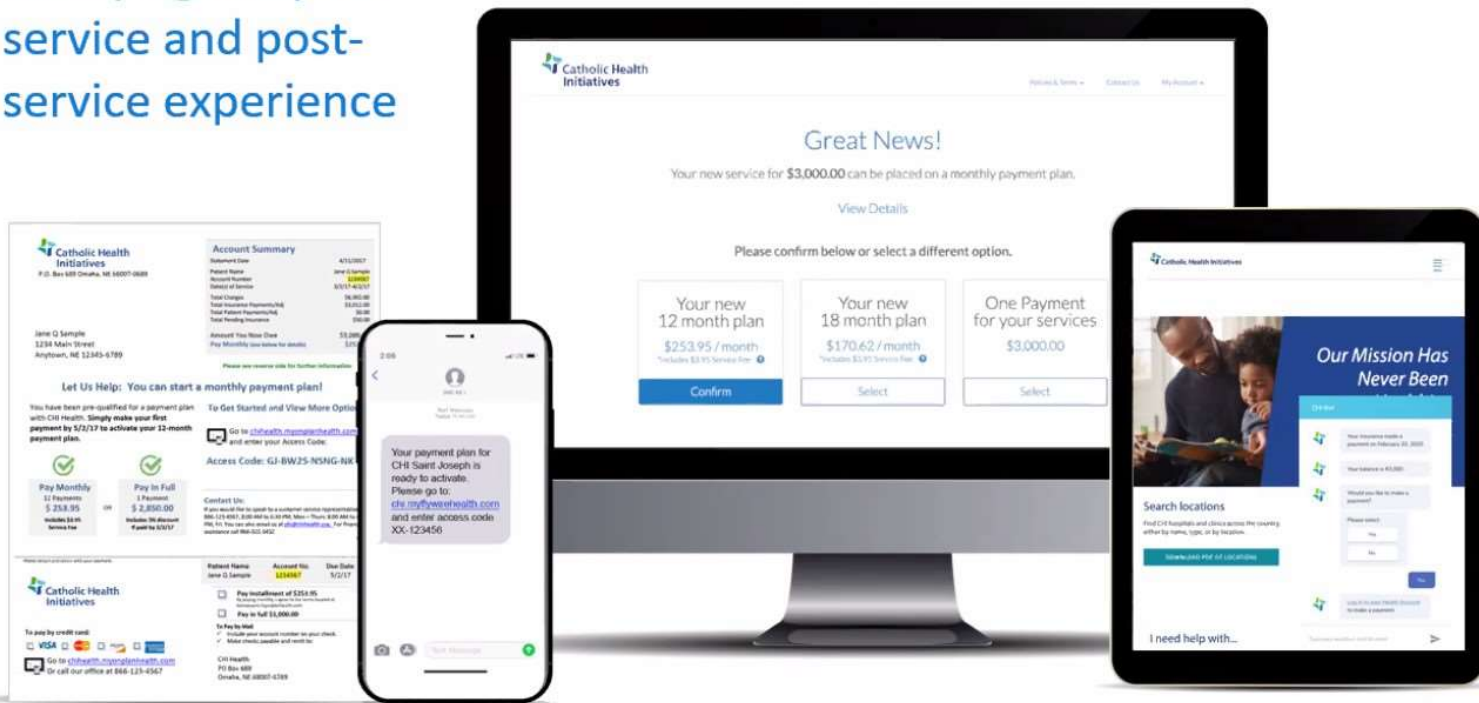
The Dreaded Experience of Paying for Care

- Half of consumers feel a *significant* burden paying for care
- 87% of consumers incur some level of difficulty in trying to understand their healthcare bill(s)
- 65% feel its important to be able to fully understand their bill
- 51% feel its important to receive a single bill
- Many dissatisfied patients describe paying for their care as one of the worst parts of the experience





Marrying the pre-service and post-service experience

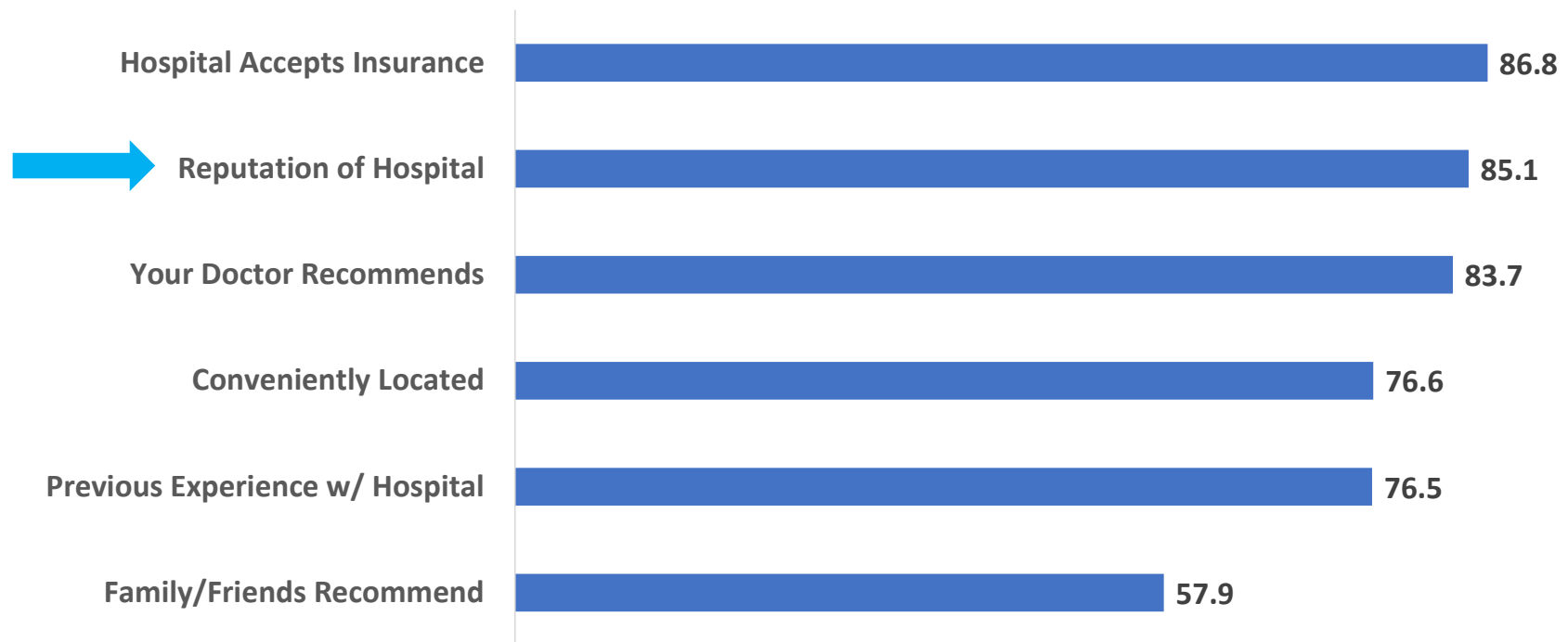


← Pre-service — Point-of-service — Post-service →



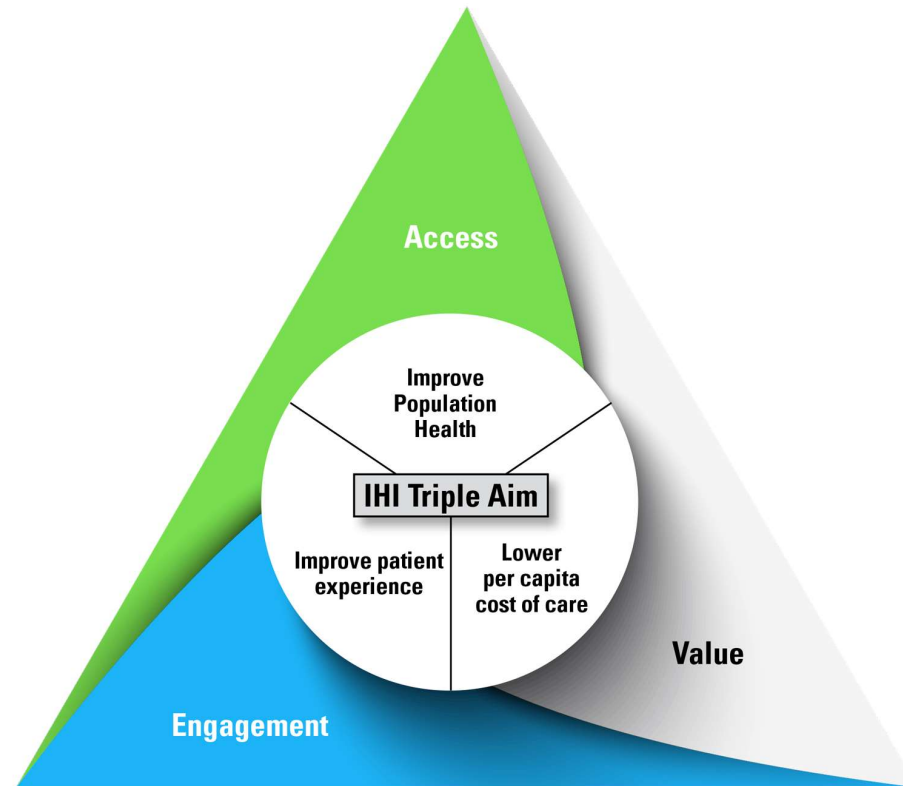
Reputation is a Big Three Selection Factor for Consumers

How important would the following factors be to you when selecting a facility?



SOURCE NRC Health's Market Insights survey of consumers, 2020, national n size = 292,510

The “Consumer Edition” of the Triple Aim



Source: Institute for Healthcare Improvement (IHI), NRC Health

Tracking Consumer Trust During the Pandemic

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



35.6%

of national consumers say they trust local hospitals & health systems the most to handle the COVID-19 pandemic



▲ 14.9% since April 2020
(20.7% → 35.6%)

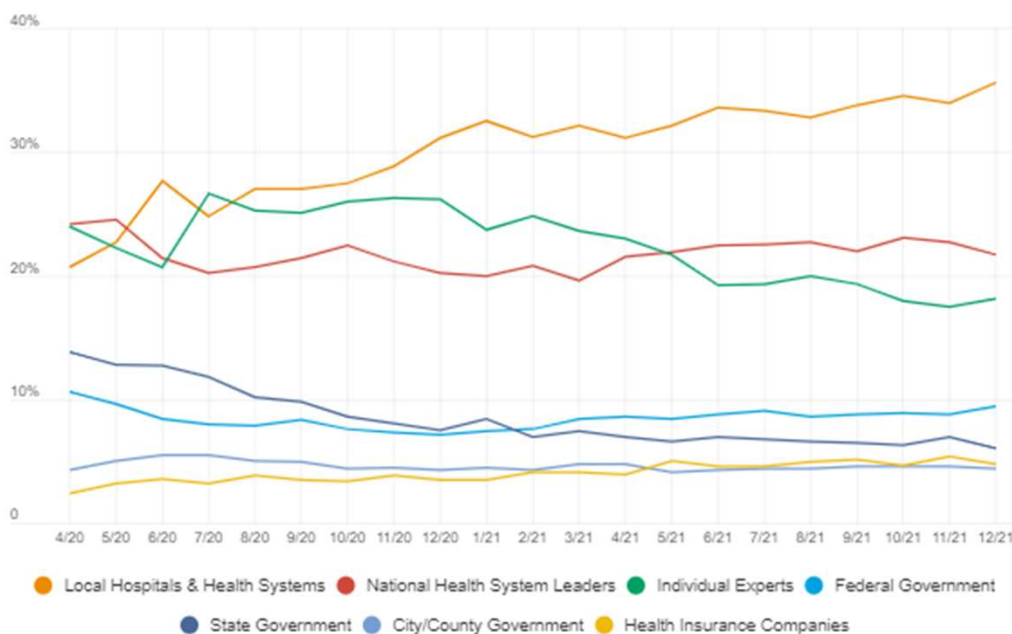


All forms of government
dropped below 10%



National quarterly n size
≈ 22,000 Consumers

Trust - Monthly Trend

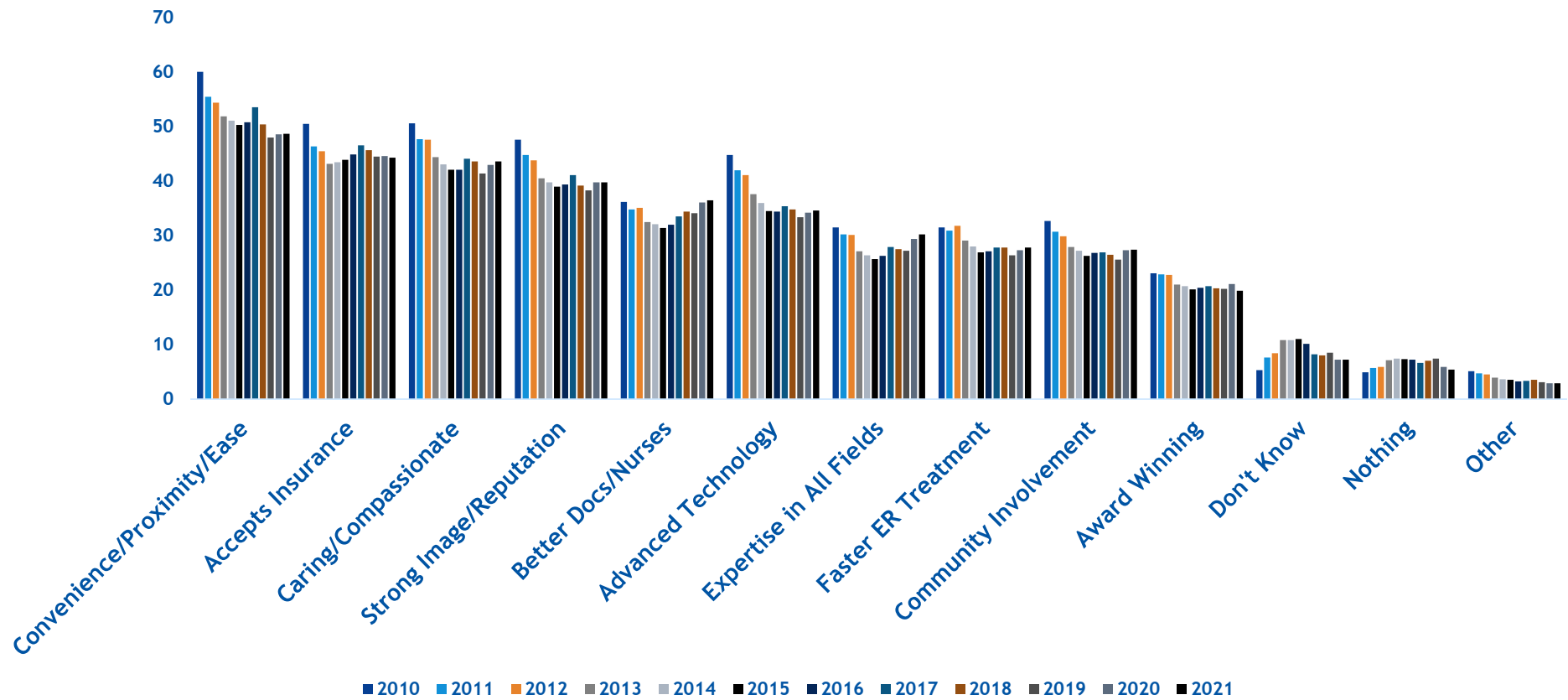




Which differentiator is the most identifiable among consumers?

- a) Better Doctors/Nurses/Caregivers*
- b) Expertise in All Fields*
- c) Convenience*
- d) Compassionate Care*

National Comparison of Brand Differentiators



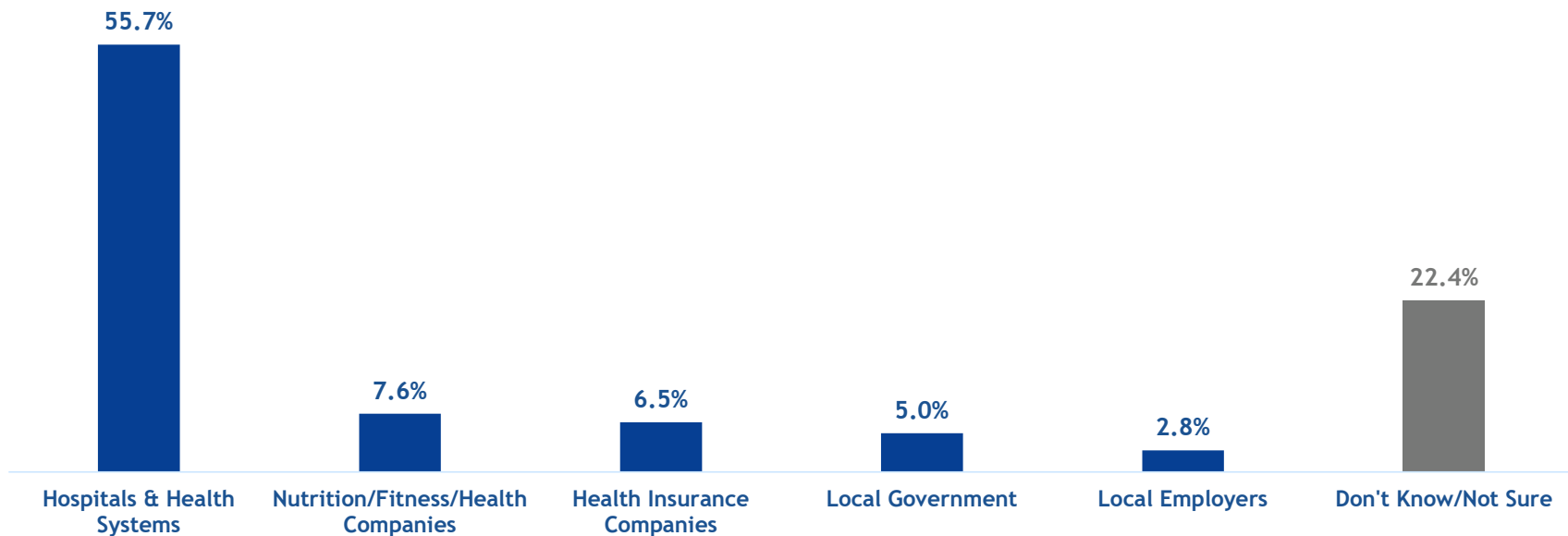
Source NRC Health's Market Insights, national market trend, 2010-2021, n = 284,111 (annual average)



Post-Pandemic Strategy for Boards

Bearing the Burden of Responsibility for Health

Who is responsible for your community's health?



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



Three Priorities for 2022 and Beyond

- **We know our patients, but do we know our consumers?**
We must inject the consumer point of view into our priorities.
- **What is our post-COVID brand and how do we build it?**
Our brand's fate rests with our audience and they are shifting how they value healthcare - will we shift along with them?
- **Community trust is our most valuable resource.**
How do we build trust when there isn't a pandemic?
- **Bonus Point:** Every little thing we do to prove we are more than just a *traditional* healthcare provider will help us.



First, we change.

Then we change the industry.

Then we change the world.

- *Patient No Longer* (page 195)





Patient No Longer Donohue



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