

The Governance Institute presents

The Great Delay: What's Driving Low (and No) Utilization Across America?

October 26, 2022 | 2:00–3:00 p.m. Eastern



Presented by

Ryan Donohue
Strategic Advisor
NRC Health



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HEALTH

Today's Presenter



Ryan Donohue
Strategic Advisor
NRC Health

Ryan Donohue is considered a thought leader in the realm of healthcare consumerism. He currently serves as Strategic Advisor for NRC Health, the largest surveyor of healthcare consumers in the U.S., and as an Advisor for The Governance Institute, the leading educator of healthcare executives and trustees in the country. 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* which is 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 and explain several reasons why patients/consumers have been lagging in returning for care post-COVID.



Describe the implications of this lag on healthcare organizations, consumers, and ultimately, patients.



Identify strategies and board-level actions to reengage consumers in health.

Continuing Education

Continuing
education
credits available



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Criteria for successful completion: Webinar attendees must remain logged in for the entire duration of the program. They must answer at least three polling questions. They must complete the evaluation survey in order to receive education credit. Evaluation survey link will be sent to all registrants in a follow-up email after airing of the Webinar.

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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.

Webinar Roadmap

- Meet Healthcare's "Deferrals"
- The Prevalence of "No Preference"
- Re-Engaging the Disengaged
- Appealing to Human Beings



“When is a crisis reached? When questions arise that cannot be answered.”

- Ryszard Kapuściński

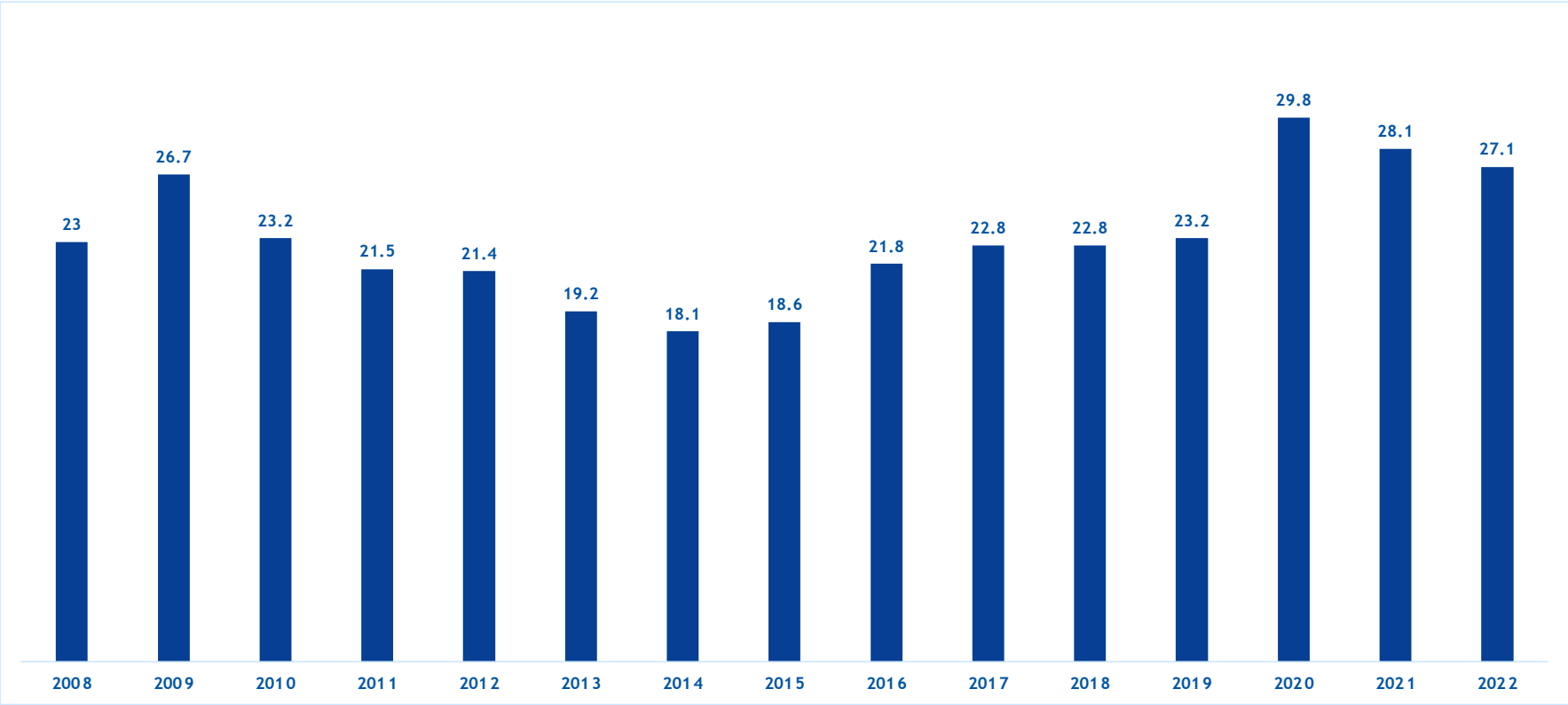
The Great Delay

- Consumers are slower to return to traditional care environments.
- Patients are less engaged and connected than they used to be.
- Healthcare organizations are painfully revising their utilization rates and future utilization (*when* will volume normalize?).
- How can we re-engage our “would-be” patients?
- How can the board reduce the impacts—both financially and psychologically—of the great delay?

A photograph of a hospital ward. Several hospital beds with white linens and beige frames are arranged in a row. Blue curtains hang from the ceiling, and a window with brown curtains is visible on the right. The floor is a light-colored, polished material. The text "Meet Healthcare's 'Deferrals'" is overlaid in white on the center of the image.

Meet Healthcare's "Deferrals"

The Crisis of Healthcare Deferment



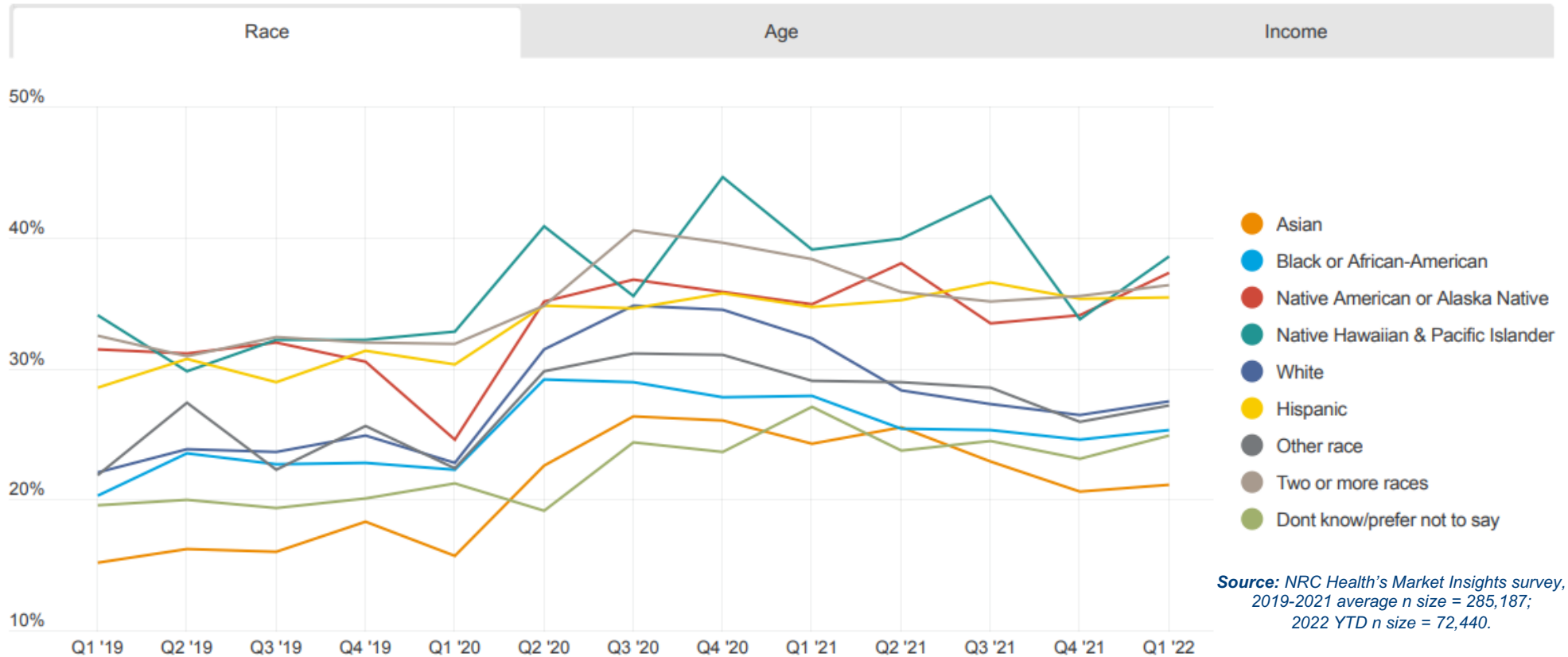
The Crisis of Healthcare Deferment

- NRC Health has been tracking the ‘Great Deferment’ all the way back to the ‘Great Recession’ in 2008-2009.
- Consumers have increasingly put off healthcare and until the pandemic the #1 reason was ‘perceived cost of care.’
- Even after COVID, consumers continue to cite **financial** concerns as their chief reason not to be treated.
- Even when they ‘manage on their own’ or ‘problem isn’t serious’ the issue of paying for care often lurks under the surface.



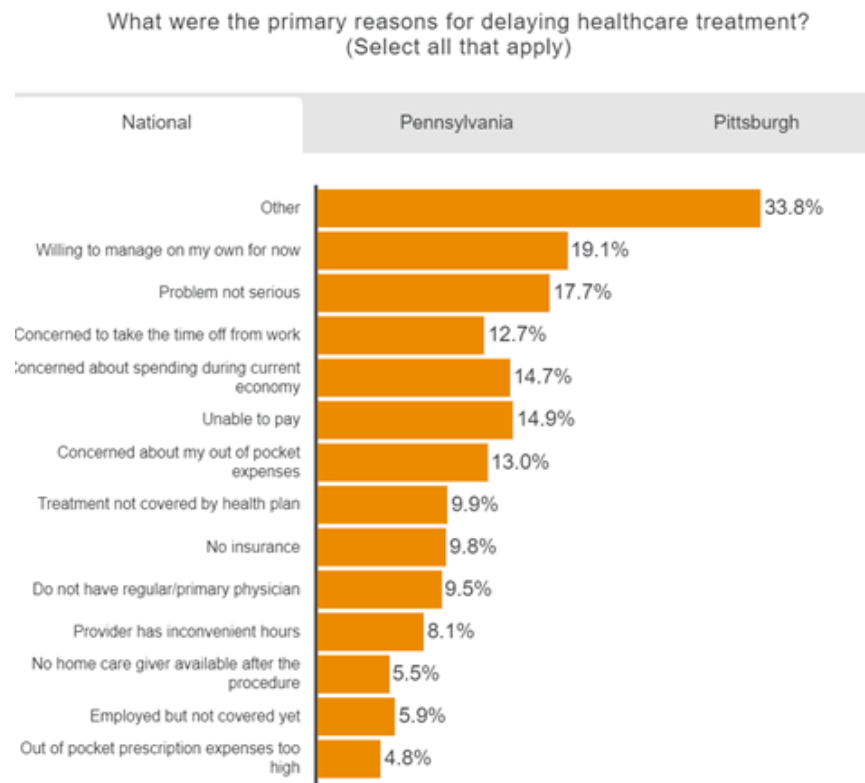
Deferred Healthcare: National Demographic Trends

Have you or anyone in your household delayed any healthcare treatment in the last 6 months?



Source: NRC Health's Market Insights survey, 2019-2021 average n size = 285,187; 2022 YTD n size = 72,440.

- Consumers cite myriad reasons for making the difficult decision to delay.
- COVID was cited in the comments of 9/10 of the ‘other’ category.
- COVID also influenced many of the other reasons cited by consumers.



Notable Trends in Deferment by Age and Income

- Older consumers see COVID as a usage barrier at much higher rates (63%) than Millennials (11%).
- Millennials do not see the problem as serious and/or much more willing to manage on their own (45%) compared to 65+ (29%).
- Take off work? It's a concern for under 65 (16%) but not 65+ (9%).
- Spending during this economy? Under 65 more concerned (16%) than those over 65 (3%) (though it doesn't mean 65+ are joyful payers).
- Concerns cut across income levels: \$100K+ households are just as concerned (13.6%) as \$25k- households (13.4%).



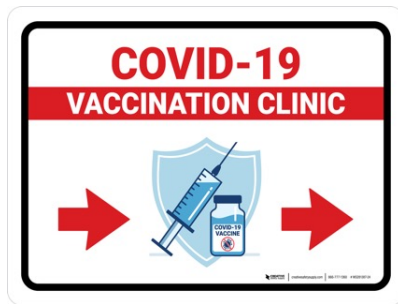


How Does the Great Delay Impact the Board?

- The board is a critical proxy for the community.
- The mission of any healthcare organization is to serve those in need of care and support—in a timely manner.
- Continuous acquisition of patients is foundational to the business of care.
- The board offers a unique, consumer-centric viewpoint on acquisition and retention of patients.



Utilization patterns continue to change.



TELEHEALTH UTILIZATION

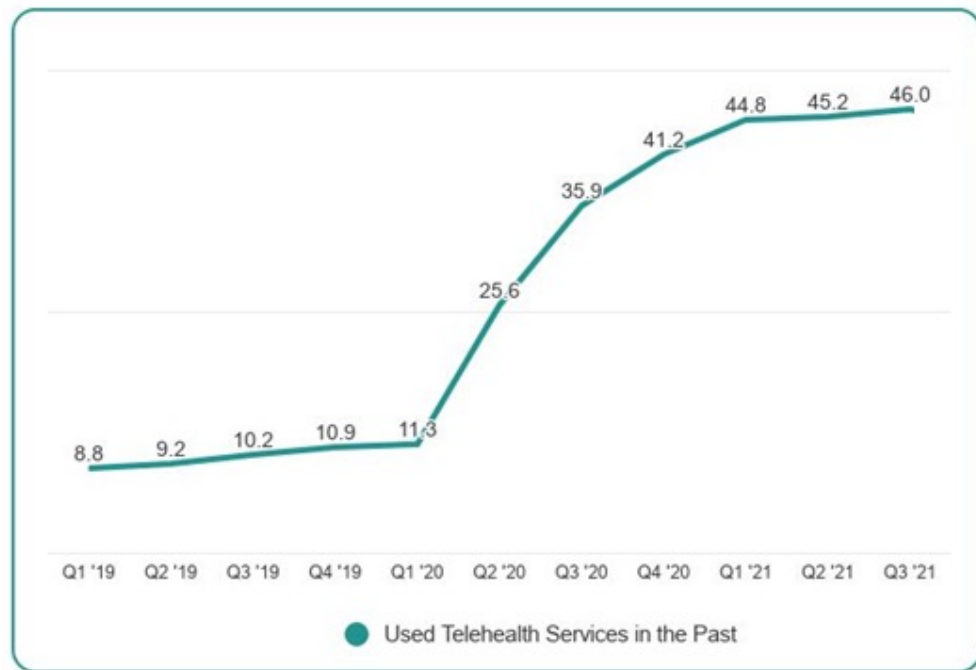
In the past, have you used the following services? A virtual or e-visit with a doctor using a video service on my computer or phone

43.9%
have had a virtual healthcare experience in the past

▲ 32.6% since Q1 2020
(11.3% → 43.9%)

▲ 14.3% quarterly increase at the start of the pandemic

National N Size -- Q4 2021
69,845



Updated: 12/17/2021

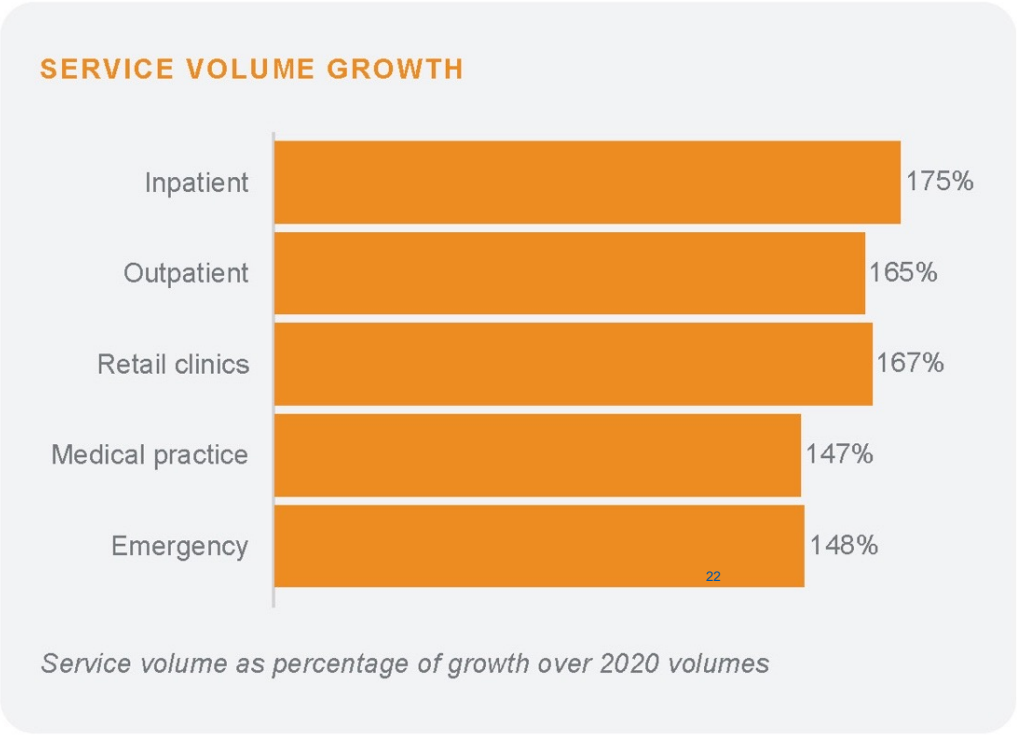
National N Size = 69,845 (Q4 2021) | NRC Health: National Healthcare Consumer Survey



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

– **Indiana patient**

As Deferralment Shrinks, Utilization Slowly Returns



to create human understanding, one person at a time.



|| Pause

Patient No Longer (NRC Health)

Where Do We Go from Here? A CEO Discussion with Mike Slubowski

SEPTEMBER 1, 2022



Unless you've been under a really big rock you've noticed things aren't going so well for US hospitals and health systems. Staffing challenges, disengaged patients, old and new financial constraints. Join us as we ponder the future with Mike Slubowski, CEO of Trinity Health: one of the largest non-profit Catholic health systems in the world. Mike shares the CEO perspective on these challenges and answers the question: what will it take to get out of this? Ideas abound including internal frameworks to engage "colleagues," focusing new attention on the "patient/member," staying in the "learning zone," and more. Beyond any single idea, we explore Mike's inspiring but realistic view of not where healthcare IS going but where it NEEDS to go.



Mike Slubowski



Ryan Donohue

Some consumers are still hesitant to return to healthcare.





A modern, multi-story hospital building with a prominent white cross logo on its facade. The building features a mix of light-colored panels and large glass windows. The scene is set at dusk, with interior lights glowing and some exterior lighting visible. The foreground shows a landscaped area with trees, a paved walkway, and a few cars parked or driving. The sky is a deep blue, suggesting twilight.

The Prevalence of
“No Preference”



“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.”

– Texas patient

The percentage of consumers indicating “no preference” for a health brand continues to fall.



NO HEALTHCARE
BRAND PREFERENCE

34.5%

-1.5% change | 36% Jan 2021

- The ‘no preference’ segment has long been an invisible group that is begging for focus and engagement from providers.

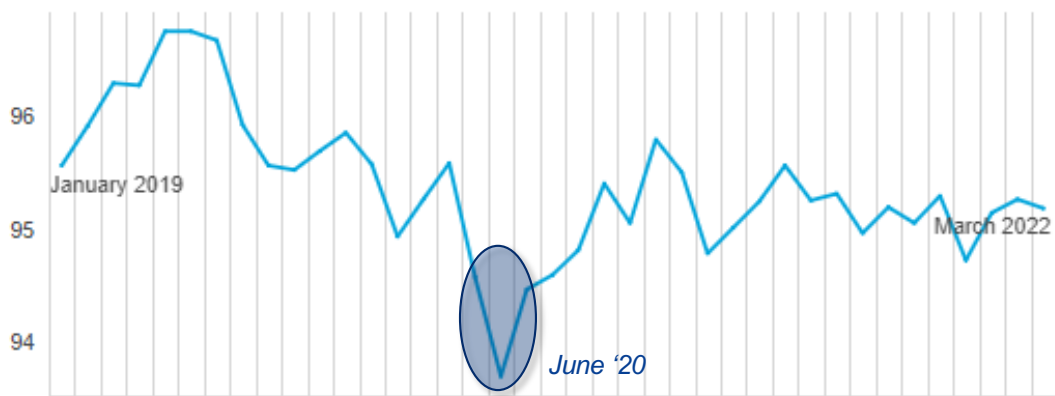
Understanding COVID's Role in Preference Dipping

Awareness

95.2 -0.1

[View Report >](#)

COMPETITOR AVG
23.5



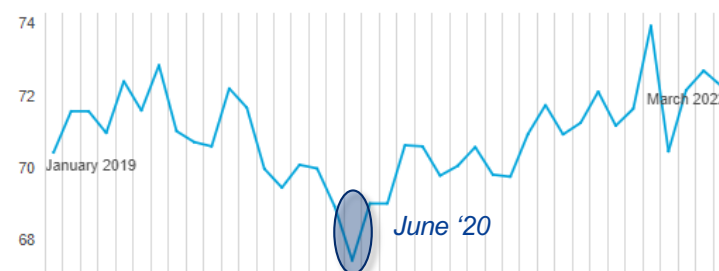
Awareness: The percent of respondents in a market who have selected your brand for any semi-aided question within the survey.

Image

72.3 -0.4

[View Report >](#)

COMPETITOR AVG
5.5



Preference

67.3 +0.2

[View Report >](#)

COMPETITOR AVG
5.0



Understanding the Trend – YOY

IMAGE

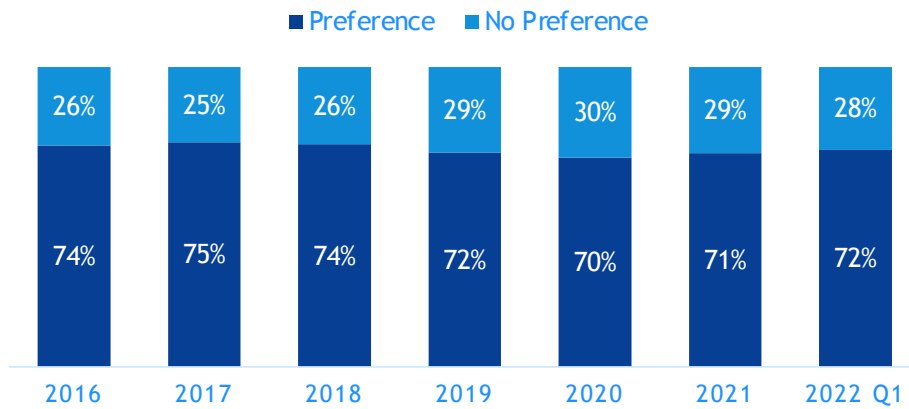
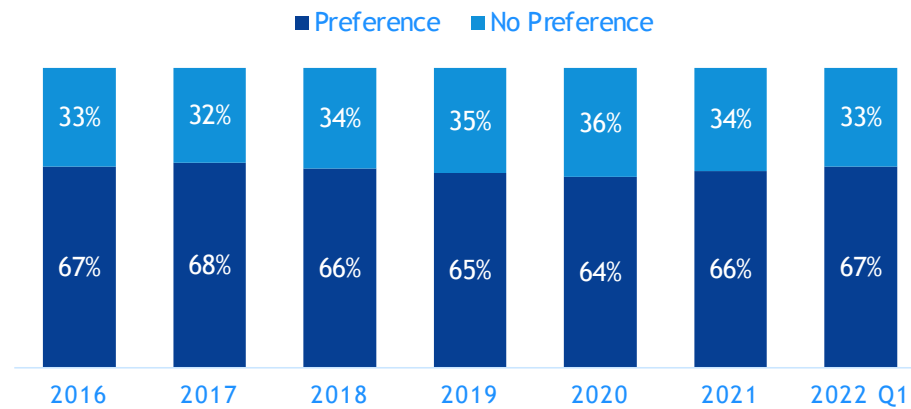


Image: The percent of respondents who have selected your brand as first choice for any of the quality/image metrics (e.g. Best Doctors, Best Nurses, etc.).

PREFERENCE

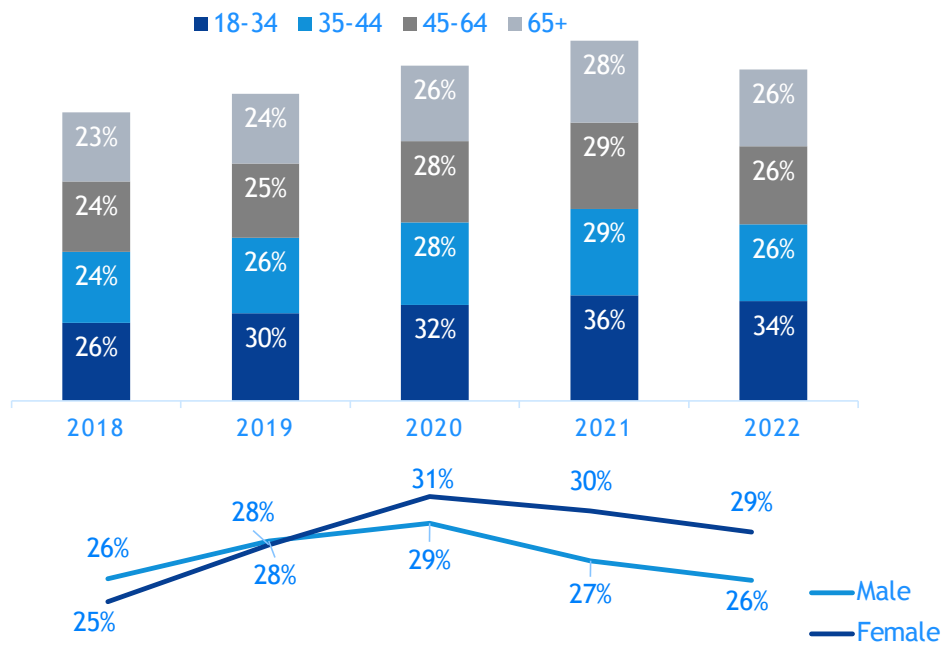


Preference: The percent of total preference your brand gamers in a given market. This metric uses our service line preference metrics (e.g. Inpatient Stay, Primary Care, etc.).

Comparing Consumers Across Age Groups

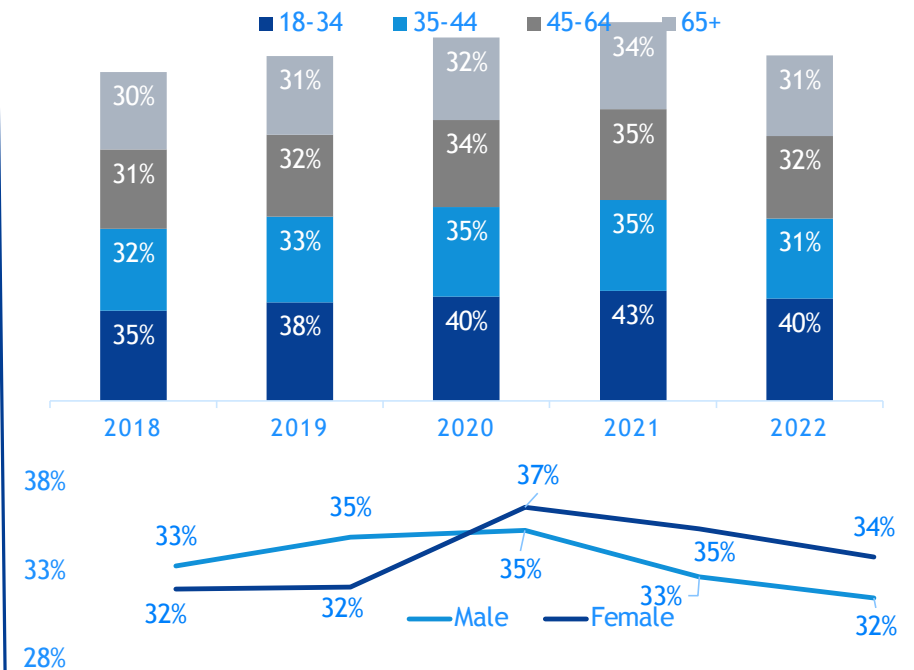
(Percent of those in age/gender who do not state a preference for give KPI)

IMAGE



Female's age 18-34 no preference for image metrics increased 10.3% from Jan '18 to Jan '21

PREFERENCE



Female's age 18-34 no preference for service line metrics increased 8.7% from Jan '18 to Jan '21

Source: NRC Health's Market Insights core survey; annual total n = 290,000 / error range = 0.2%.

Interesting ‘No Preference’ Reveals

- Uptick in men stating a preference (more based on brand)
 - Women have a higher stated preference among most service lines.
- Under 35 have significantly less preference than older consumers
 - 18–34 year-olds have higher preference than two years ago.
 - Under 35 is obsessed with convenience and affordability.
- Marketing and communications were hijacked by COVID
 - Fear and misinformation did not help our cause to build preference among those who had no stated preference prior to the pandemic.
 - How do we balance future pandemic messaging with brand building?

Critical Questions for the Board

- **What constitutes a “healthcare experience” in 2022?**
 - Filter the answers by what we offer and then by we’re strongest at offering
 - Study the gaps of “strongly offer” / “just offer” / “don’t offer”
- **Are there patients that aren’t using us but should be?**
 - Who are they? Do they share any common traits?
 - What are their chief concerns / why don’t they come?
 - Where are they going instead (if they are going anywhere)?
- **Do our patients feel connected? Will they come back?**
 - Compare pre-COVID and current Net Promoter Score (NPS)
 - Review a summary of patient comments: what is engaging? What is disengaging?

A photograph of a waiting room or a community center. The room is filled with rows of wooden chairs with light-colored upholstery. In the center, there is a small wooden coffee table with some papers on it. The walls are a neutral color, and there are framed pictures on the wall. The overall atmosphere is quiet and somewhat empty.

How to Re-Engage the Disengaged



How to Re-Engage the Disengaged

- 1** Capitalize on the ‘local halo’ of post-pandemic trust.
- 2** Bolstering our ‘virtual hospital’ and digital presence.
- 3** Curating a **hybrid journey** of care delivery.
- 4** Treating each patient as a **unique person**.

WHO DO CONSUMERS TRUST MOST DURING A PANDEMIC?

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

32.4%

Trust their local hospitals and health systems the most



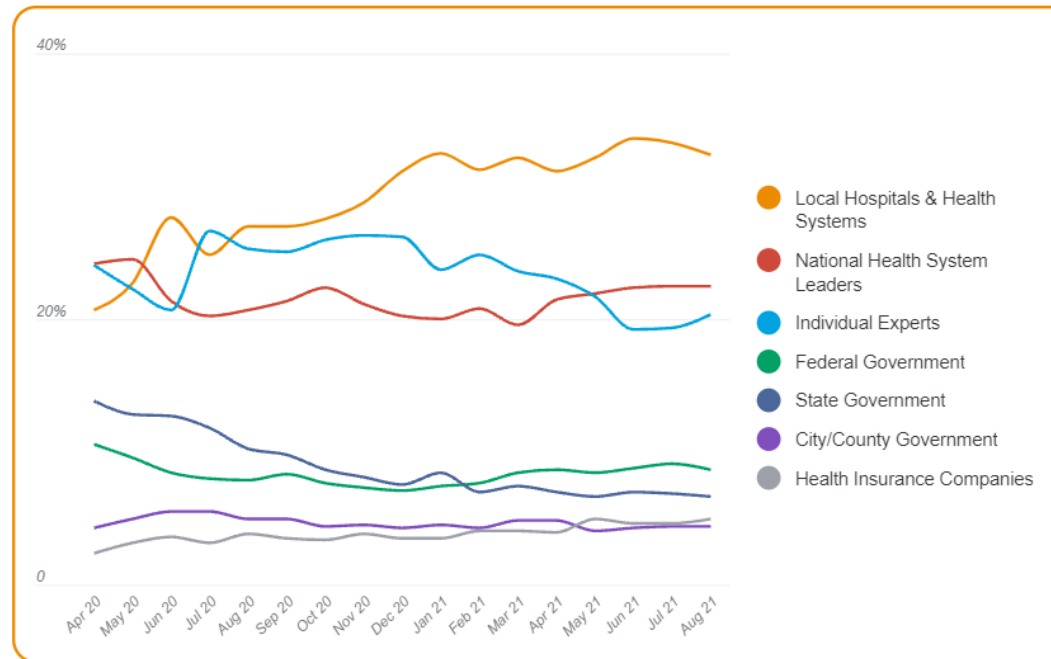
▲ **11.7%** since April 2020
(20.7% → 32.4%)



All forms of government are below 10%



N Size = **23,190**
National | August 2021



Updated: 10/11/2021

N = 23,190 (August 2021) | NRC Health: National Healthcare Consumer Survey



Consumers Increasingly Use and Trust Hospital Websites

HELPFUL INFO FROM HOSPITAL WEBSITES

5.8% ↑

2020–2021



HOSPITAL WEBSITE VISITS

4.6% ↑

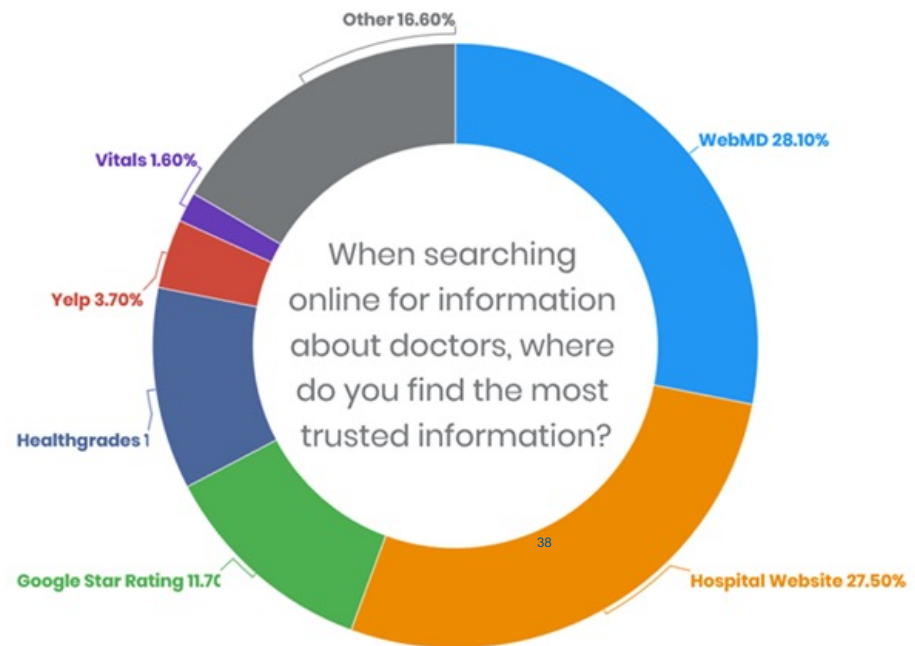
Since November 2020



→ Our Website became our virtual building during the pandemic. How much investment are we putting into it?

Consumers Increasingly Use and Trust Hospital Websites

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



The Ascent of Physician Ratings and Reviews Continues

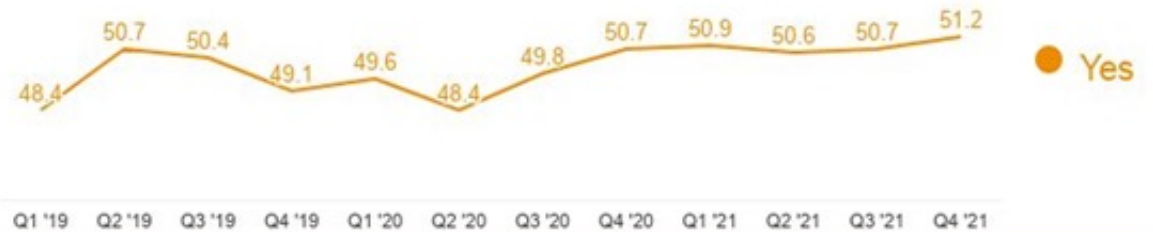
51.2%

have viewed ratings/reviews of healthcare providers online

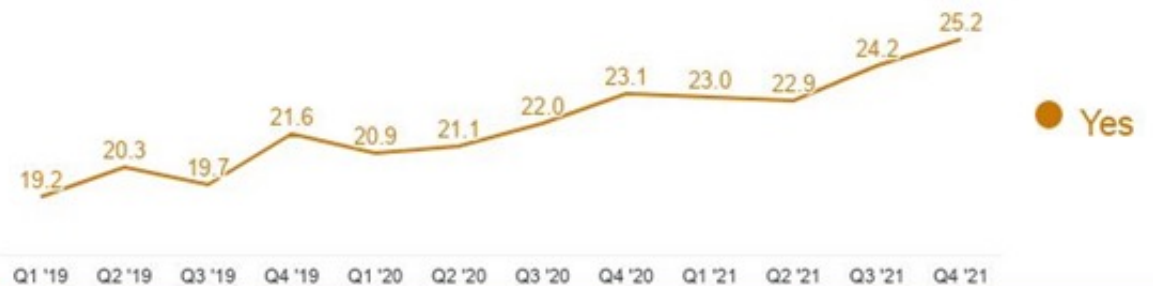
25.2%

rated or reviewed a healthcare provider online

Have you ever viewed the ratings and reviews of a doctor online?



Have you ever rated a doctor or written a review for a doctor online?



Telemedicine Remains a Rare Source of Excitement

While telemedicine struggled with how reimbursement and logistics would work in years past, the widespread adoption of this technology has grabbed and is now holding consumer interest. Consumers' excitement for telehealth has hovered around **55%** throughout the pandemic, compared to the pre-pandemic average of 49.3% in Q1 2020. Consumers 35 to 44 years old are the most excited about telehealth (**68.1%**).



Source: NRC Health's Market Insights study, 2010–2021, average annual n sizes vary from 208 (qual) to 278,824 (quant).



The Hybrid Experience in Healthcare

- While virtual is desirable, most consumers understand there are large parts of care delivery that must remain physical.
- Consumers don't want divided experiences—they want seamless experiences.
- The hybrid experience is a designed journey of care:
 - Pre-experience centers on easy access.
 - Post-experience centers on feedback and recovery.

HEALTH

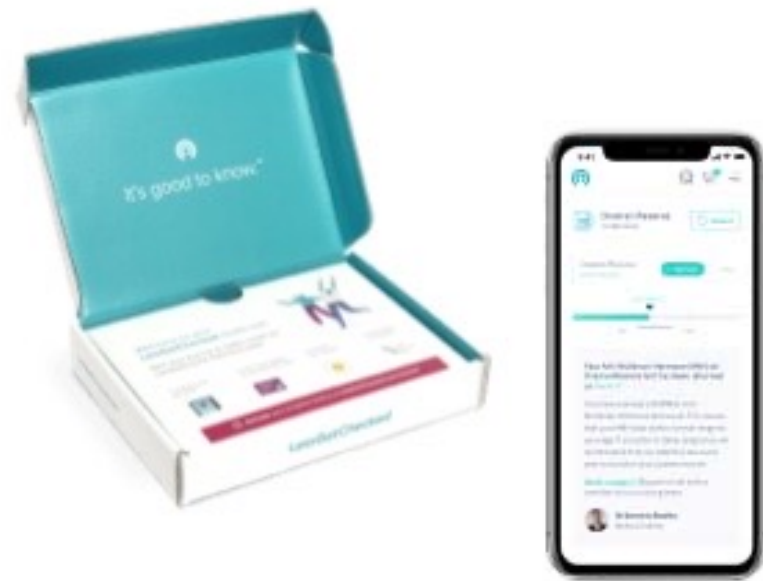
Companies Bet You're Ready to Test at Home for More Than Covid-19

Developers pursue rapid flu and strep-throat diagnostic products, as pandemic raises consumers' comfort level with monitoring own health



An at-home Covid-19 test from Cue Health uses an electronic reader.

PHOTO: CUE HEALTH



A photograph showing a man and a young child sitting at a desk. The man is in the foreground, looking at a laptop screen. On the screen, a doctor wearing a white lab coat and a face mask is gesturing with his hands. The child is sitting behind the man, looking towards the screen. On the desk, there is a notebook, a pen, and a cup of tea. The text "Appealing to Human Beings" is overlaid in white on the image.

Appealing to Human Beings



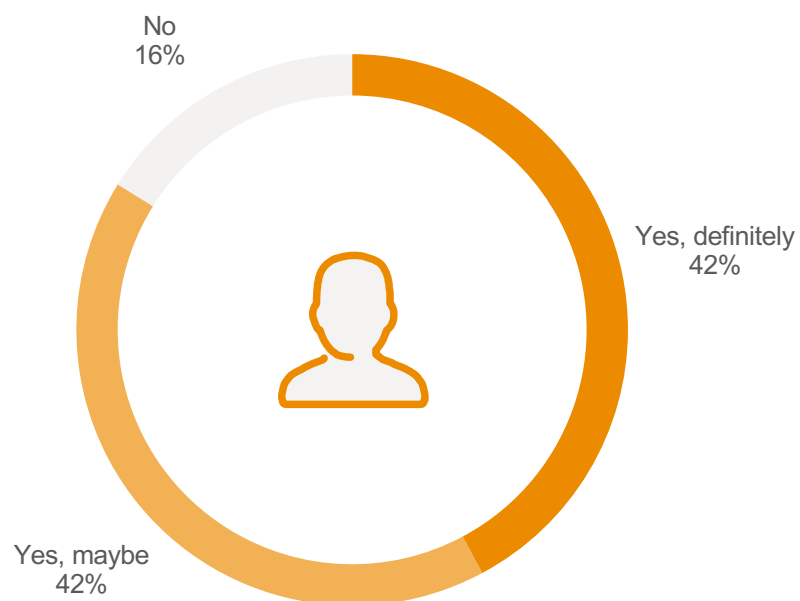
“The doctor took the time to address all my priority questions, explore strategies to address particular concerns, and most importantly, approached me as a **unique person.**”

– **Colorado patient**

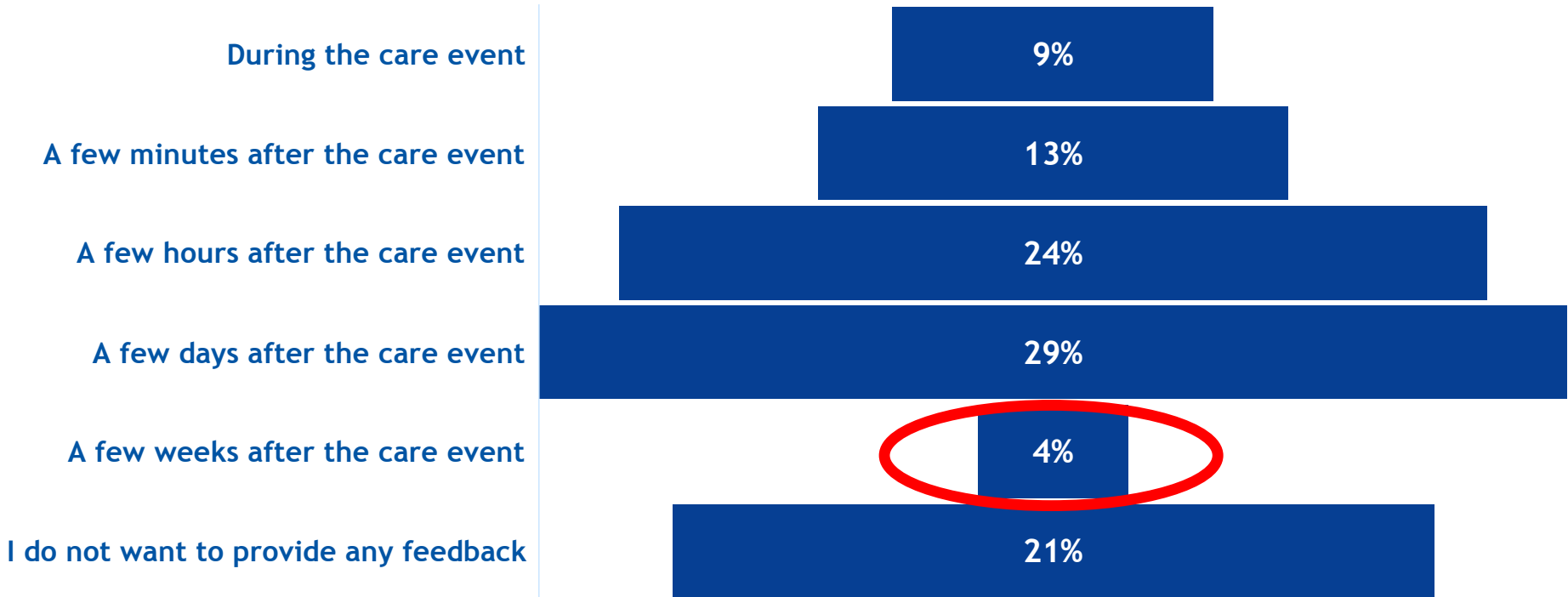
The Expectation to “Make It Right”

84%

of patients expect you to follow up with them if they have a bad care experience.



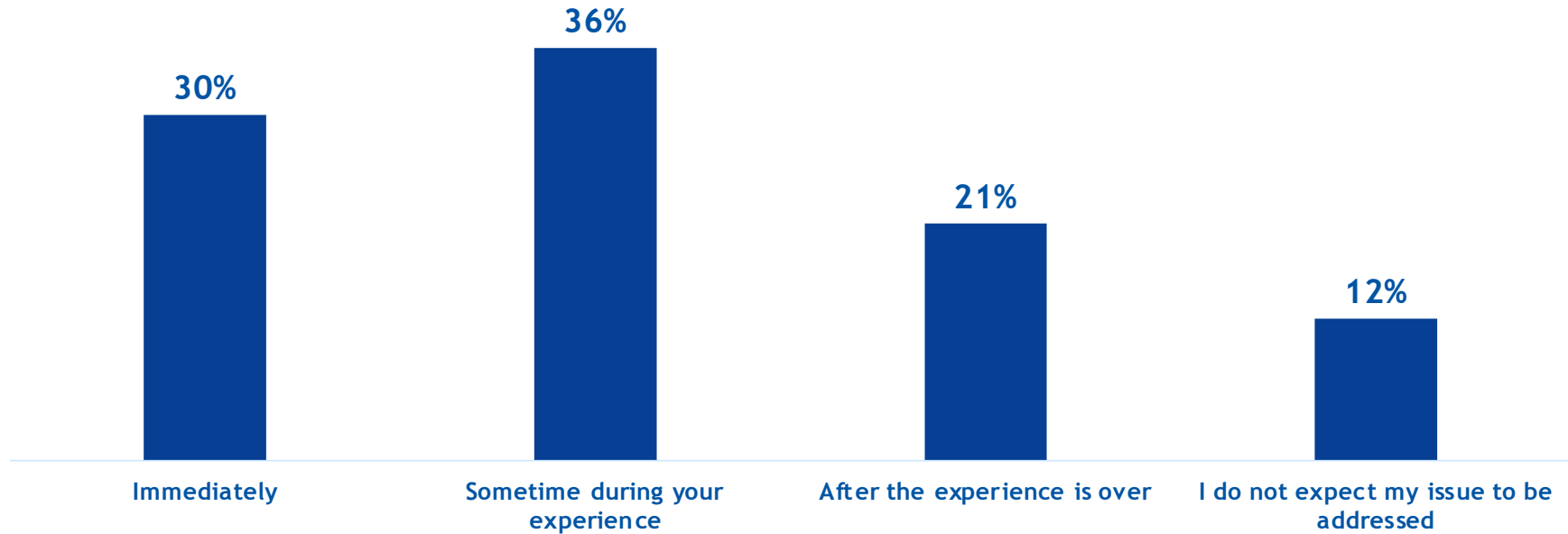
When Do Consumers Want to Give Us Feedback?



Source: NRC Health's Market Insights survey of healthcare consumers, nationwide, December 2020, n size = 2,004.

When Do Consumers Expect a Response/Solution?

If while providing feedback during your experience you raised an issue or pointed out a problem, when do you expect those issues to be addressed?



Source: NRC Health's Market Insights survey of healthcare consumers, nationwide, December 2020, n size = 2,004.

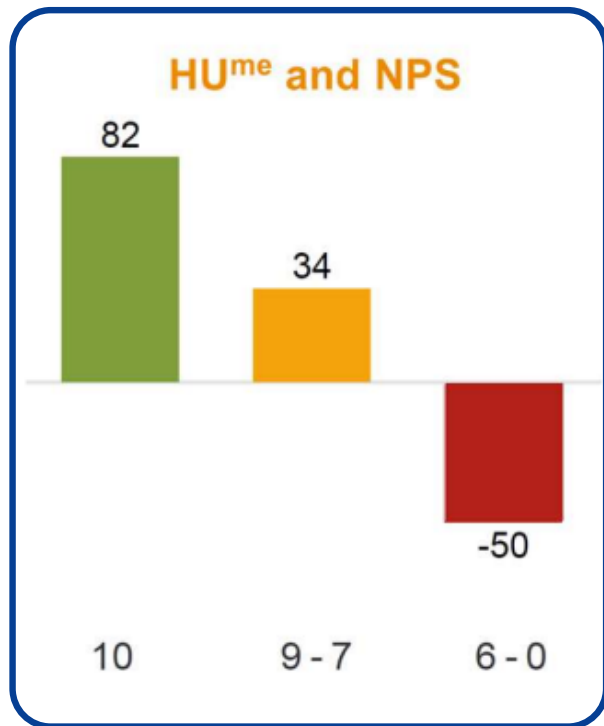
Healthcare Is the Place We Want to Be Known as a Person

How important would it be for everyone to treat you as a unique person when you are doing the following things?



N = 68,613 national survey

The Importance of Being Treated “as a Person, Not a Number”



Treating patients uniquely drives NPS:

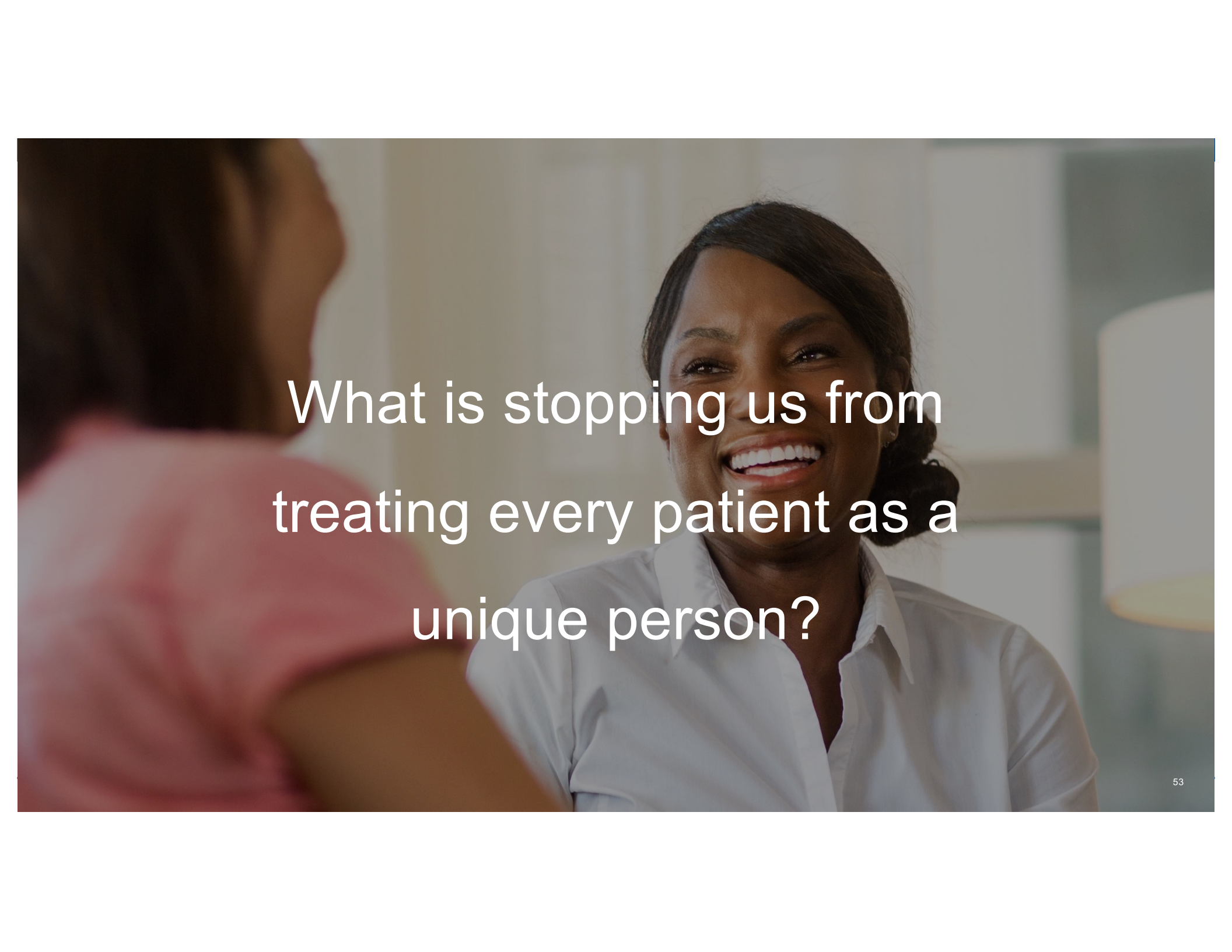
Did everyone treat you as a unique person?

- The odds of being a Promoter are 13 times higher if patients answer '10' (yes, everyone did).
- The odds of being a Detractor are 15 times higher if patients answer '0' (no, no one did).

Recap: How to Re-Engage the Disengaged

- 1 Capitalize on the ‘local halo’ of post-pandemic trust.
- 2 Bolstering our ‘virtual hospital’ and digital presence.
- 3 Curating a hybrid journey of care delivery.
- 4 Treating each patient as a unique person.



A photograph of a woman with dark hair, wearing a white button-down shirt, smiling broadly and looking towards another person whose back is to the camera. The person in the foreground is wearing a pink shirt. The background is a softly lit indoor space with a lamp visible on the right.

What is stopping us from
treating every patient as a
unique person?



Patient No Longer Donohue



The screenshot shows the ACHE website's Learning Center. A sidebar on the left lists categories like 'New Releases', 'Book By Topic', and 'Higher Education'. The main content area features a promotional banner for a 'HAP Summer Sale' and a product listing for the book 'Patient No Longer: Why Healthcare Must Deliver the Care Experience That Consumers Want and Expect' by Ryan Donohue and Stephen Klasko, MD. The book details include ISBN 978-1-64055-180-0, 179 pages, and prices for members (\$33.60) and non-members (\$48.00). There are buttons for 'ADD TO CART' and 'REQUEST EXAM COPY'. Below the book listing, there are filters for 'By Topic' with options for 'Patient Experience' and 'Patient-Centered Care'.



Ryan D. Donohue

@RyanDDonohue



**“Patient No Longer”
Podcast**

Contact Us...



Ryan Donohue
Strategic Advisor
NRC Health
RDonohue@NRCHealth.com
www.NRCHealth.com



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