WHAT TODAY'S EVOLVED PATIENT WANTS

BY: JOHN E. THOMAS & GABRIELA PASHTURRO

In the 2000 romantic comedy *"What Women Want,"* a severe electrical shock gives a male advertising executive the ability to hear what women are thinking. In 2019's *"What Men Want,"* the roles are reversed when a female sports agent drinks a concoction that suddenly allows her to hear what men are thinking. Although fanciful in their premise, these movies underscore a deep desire held by us in the field of consumer insights – the need to truly know what consumers think, feel and want and how this translates into real behavior. This understanding is perhaps no more important (and personal) than in the world of Healthcare.

THE IMPACT OF CUSTOMER CENTRICITY ON PATIENT HEALTHCARE NEEDS

One has to look no further than Amazon to understand how the way convenience, technology and speed are impacting how consumers seek for and use information, products and services. It remains to be seen how impactful Amazon's Haven Health, their newly-formed healthcare company with Berkshire Hathaway and JPMorgan Chase, will really be, but we can be sure that this new potential industry powerhouse will shake things up. Amazon's acquisition of PillPack, a service that provides home delivery of medications, is but one more example of how a customer-centric company like Amazon can step in to provide services normally reserved for traditional healthcare companies. And they are not alone. Any number of companies are racing to serve the consumer's evolving healthcare needs from products such as wearables to voice assistants that can one day perform AI to help consumers understand, and treat, their health better.

As patients' healthcare costs continue to rise, we can only expect that patients will continue to act more like "regular" consumers, in that they will seek out (i.e., shop for) lower-cost, higher-value healthcare services. As patients learn more about different and novel opportunities to receive care in the way THEY want it, we must continue to evolve with them to change our mindset from the person as patient to the person as consumer.

SO WHAT DO EVOLVED HEALTHCARE CONSUMERS WANT?

Partnership. Webster's Dictionary defines partner as *"a person with whom one shares an intimate relationship."* Receiving care delivery services is probably the most intimate experience a consumer has with anyone outside their family or friends. As such, we need to continue to up our game in this regard by understanding the evolving needs of healthcare consumers.

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There are at least four key things that need to be in place for the evolved healthcare consumer to feel they are in partnership with their care delivery organizations:

01. **They Want Their Higher Expectations for Service Met or Exceeded:** Given patients' interactions with non-healthcare, consumer-centric companies, they naturally expect for these characteristics to transfer to their interactions with the healthcare industry.

02. **They Want Greater Availability and Accessibility of Information:** Having health care information that is readily available and easily accessible can support the evolved consumer's need to receive information in the way they want it and at a time that they prefer.

03. **They Want Access to New Technology:** The use of technology to access a variety of different providers and types of health services allows for more non-traditional and more convenient interactions between healthcare providers and the evolved consumer.

04. **Health Care Services That Go Beyond the Traditional 1:1 Relationship with One's Primary Provider:** Specifically, among younger consumers, the greater need is access to a variety of information, products and services vs. a traditional 1:1 relationship with any one physician or even a health system.

For this article, we will focus on the first two needs – Higher Service Expectations and Greater Availability of Information.

SO, HOW ARE WE DOING?

Burke recently conducted a national study of 6,000 consumers across the US. Roughly half of our surveys were with those that recently had a visit to their Primary Care provider, with the remainder having recently had a visit to Specialty Care or Urgent Care. With a focus on likelihood to recommend the care delivery organization, the key outcome measure used in this survey is the Net Promoter Score (NPS). NPS is a Customer Experience metric that looks at likelihood to recommend responses and classifies them into Detractors, Passives, and Promoters. While at Burke we are outcome metric-agnostic, we utilize NPS (see Figure 1) with many of our clients who have shifted to this metric, due to its ease of understanding and widespread use.

WHAT HAPPENS IF WE MEET OR EXCEED THE EVOLVED HEALTHCARE CONSUMERS' NEW EXPECTATIONS?

Previous research has shown time and again that a satisfied patient is more likely to adhere to their care plan and to generally achieve better healthcare outcomes. And that's great. However, the linkage between a satisfied patient and their likelihood to become a true partner with their healthcare providers is less clear. Today, we need to be looking past just satisfaction to making patients "promoters" of their relationship with you – both to continue to engage in their health and also to promote the healthcare they receive to others. We need to better understand patients' willingness to promote and talk about their care experiences with friends or family, and what makes people promoters of your clinic, facility, or practice. And in order to do that, it is critical to move beyond satisfaction and rather evaluate the patient visit through this evolved lens, using the measure of likelihood to recommend the care delivery organization.

FIGURE 1
NET PROMOTER SCORE (NPS)

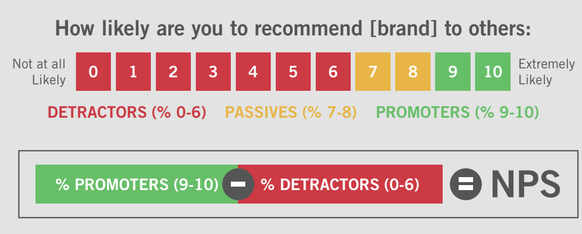
WHAT IS IT?

Net Promoter Score (NPS) is a measure of loyalty based on the perspective that patients can be divided into three categories: promoters, passives and detractors. Patients are asked their likelihood to recommend on a 0-to-10 scale and are categorized as follows:

- Promoters (score 9-10)
- Passives (score 7-8)
- Detractors (score 0-6)

HOW IS IT CALCULATED?

NPS is calculated by taking the percentage Promoters and subtract the percentage of Detractors.



A LOOK AT THE TOP TEN PATIENT EXPERIENCE DRIVERS OF NPS:

For this article we have decided to stick with a basic correlational analysis to keep the conversation simple and direct.

Interestingly, the top ten drivers overall across all survey respondents (defined here as simply the ten survey items with the highest correlation to NPS), are evenly split between two of the four key needs of the evolved patient:

A FOCUS ON SERVICE

The survey attribute with the highest correlation to NPS in our study was, *"The provider partnering with you in decision-making about your health and treatment."* This finding provides clear support for the idea that today's evolved healthcare consumer wants to be seen as a partner, not simply a passive receiver of healthcare.

Also making it into our Top Ten Service Attributes:

- Respecting your privacy
- Ability to receive care when you need it
- Taking time to listen to you and showing they care
- The time that the provider spent with you

The fact that these attributes are in our top ten supports our notion that today's evolved healthcare consumer demands service commensurate with what they experience with other customer-centric organizations. Regarding privacy (#2 on the Top Ten list), consumers expect healthcare to follow the standards that industries such as the Financial Services sector has set in this regard. This is another example of expectations crossing industry lines.

Patients also need the provider to spend an appropriate amount of time with them and really understand their needs. And, this has to be done when the consumer needs it, not when it fits in another's schedule.

A FOCUS ON INFORMATION

Today's evolved healthcare consumer craves information, so it is no surprise that landing at #3 on our top ten list is **"***Information given to you regarding your treatment plan or next steps.***"** Today's evolved consumer is bombarded with data every day. As consumers continue to learn how to better access, manage and interpret this wealth of information, they will be proactively asking for it and wanting it so they can be a true partner with their provider. Quickly vanishing from our landscape is the traditional "Doc knows best" mindset.

Also making it into our Top Ten Information-Focused Attributes:

- Following up with you about information requested or test results
- Being able to answer your questions or concerns about your health
- Knowing the important information about your medical history
- Understanding the referral process

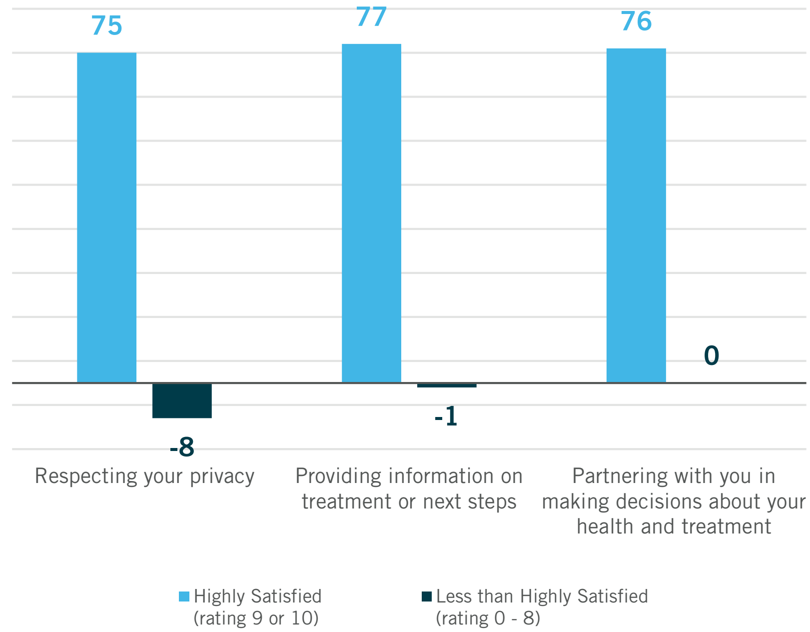
As with Service-focused attributes, these Information-focused attributes being in our top ten also supports the concept that information is key to meeting the needs of today's evolved healthcare consumer. Companies obsessed with their customers have in place key mechanisms for making sure their customers are armed with all the important information they need. They do not put the burden on the customer to hunt for information or create the need for them to make multiple calls to get their questions answered.

Ten years ago, the typical healthcare consumer could not explain the concept of the Electronic Medical Record or what a "patient portal" was. Today, many consumers can not only tell you what a portal is but how frequently they use it and have come to rely on it. In fact, they expect one to be provided! This supports the dramatic evolution in customer knowledge and how sophisticated the newly-evolved patient has become when it comes to technology.

FOCUSING ON CUSTOMER CENTRICITY IN HEALTHCARE – DOES IT REALLY MATTER?

In short – yes! A very significant impact on NPS can be seen when we look at those that are highly satisfied (rating 9 or 10) on the top drivers vs. those that are not highly satisfied (rating 0 to 8). The gap in NPS is largest for things that are required to meet the needs of patients, like respecting patients' privacy, which produces an NPS gap of 83 points, depending on satisfaction scores. The two other top 3 attributes related to providing information about treatment or next steps and being a partner in decisions regarding treatment, also have large gaps in NPS, depending on how a care delivery organization performs – gaps of more than 75 points on NPS. Care delivery organizations' strong performance on these attributes will shape patients' perceptions of their providers, clinics, staff, and the entire care experience. Having positive patient experiences that meet or exceed new service and information expectations, will impact patients' inclination to speak about and promote the care they receive.

Net Promoter Score (NPS) by Patients Highly Satisfied or Less than Highly Satisfied on Top Three Correlates of NPS



Traditionally, patient satisfaction research has focused on ensuring the patient is simply that – satisfied – on a series of attributes that span the care experience, from access to care, to wait times, and, sometimes most importantly, the relationship with the provider. While providers' interpersonal skills are necessary table stakes at a basic human level, in these days of increasing competition for the evolved healthcare consumer, providers need to be strategic and proactive in how they provide direct care, and continue to evolve how they provide information and technology as part of their wheelhouse.

Care delivery must be comprehensively packaged in a way that is accessible, easy to digest and convenient for today's consumer. We call for a creating a deeper understanding of how higher expectations of service and information impact the newly-evolving healthcare consumer and their behaviors. Measuring their willingness to promote their care experience to others is key to our ability to continue to evolve with the new healthcare consumer.

ABOUT THE AUTHORS

JOHN E. THOMAS,
SVP, MANAGING DIRECTOR, BURKE HEALTHCARE

As Senior Vice President and Managing Director of Burke Healthcare, John leads a team of dedicated Healthcare researchers and consultants with specific expertise in patient experience, pharmaceuticals, medical devices and diagnostics, health insurance, distribution and health information technology.

GABRIELA PASHTURRO
SVP, SR. ACCOUNT EXECUTIVE, BURKE HEALTHCARE

Gabriela has been partnering with Burke clients, end-to-end for over 20 years. In her role as Account Executive, she is able to use her natural drive and passion for insights to maximize her clients' ability to improve and grow their business.

ABOUT THE STUDY: Burke, Inc. conducted a national study of 6,000 patients across the US. This included 3,000 Primary care patients, 2,250 Specialty care patients, and 750 Urgent care patients. Commercial patients made up 66% of the sample, while Medicare and Medicaid represented 18% and 8%, respectively. The study used online panel sample and was conducted online in August-September of 2019.