



ECRI

The Most Trusted
Voice in Healthcare

Addressing the Demands of the Modern Healthcare Consumer



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“Consumers have been empowered by technology, they’re accessing more information than ever before, and they’re able to make choices about their own healthcare, whereas in the past perhaps they would have relied upon their doctor to make those choices for them.”



Scott Melville, CEO of Consumer Healthcare Products Association

Session Objectives

- Better understand the healthcare consumer's experience within the system.
- Identify opportunities to involve healthcare consumers needs.
- Identify organizational opportunities to incorporate new technologies and practices to drive consumer engagement

The ECRI Difference | Data Empowers. ECRI Delivers.

ECRI is a leading independent patient safety expert, reducing preventable harm, and making healthcare more transparent and accessible

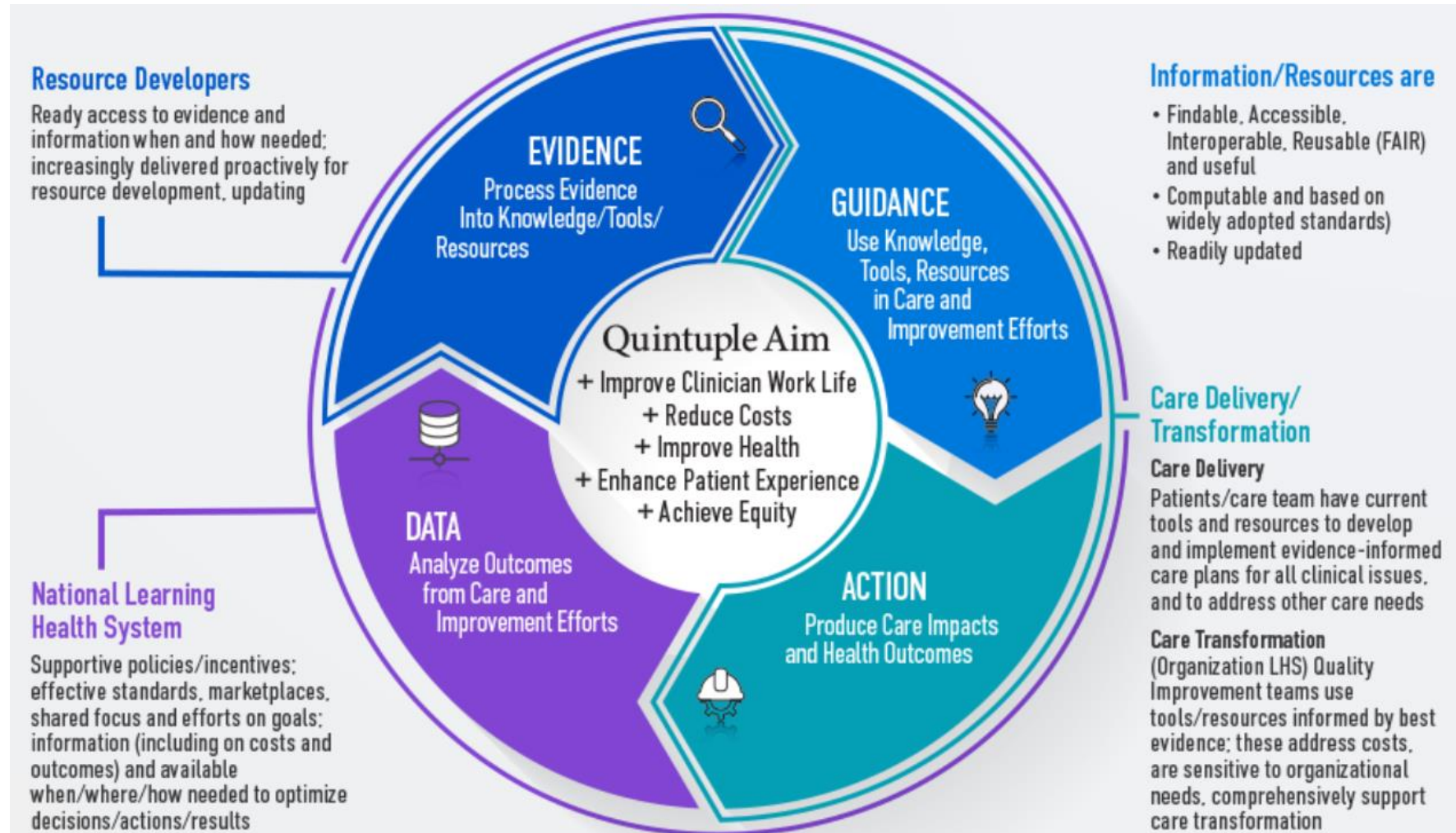
- 50+ years of experience as a global leader in patient safety
- At the forefront of research of technologies, patient safety, quality, and evidence-based medicine
- A leading provider of spend and clinical data analytics and solutions



Committed to Integrity, Transparency, and Excellence

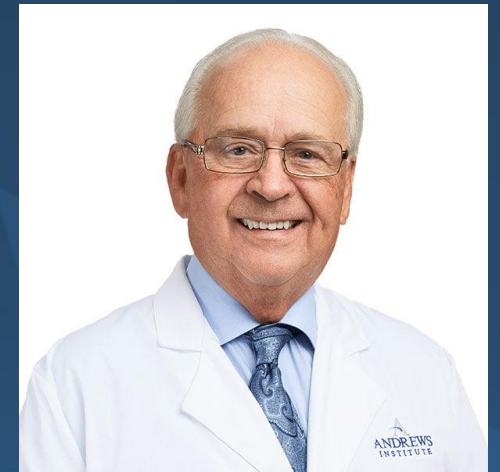
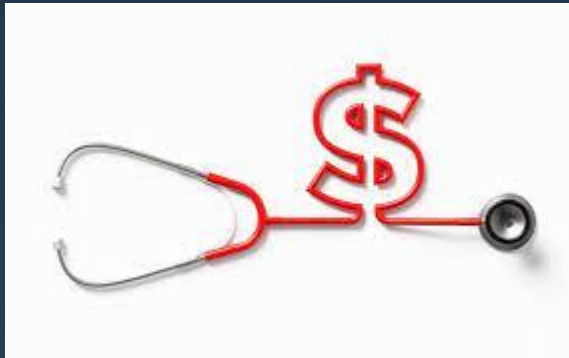
AHRQ evidence-based Care Transformation Support (ACTS)

Future Vision: A Knowledge Ecosystem that Supports Learning Health Systems



Source: AHRQ evidence-based Care Transformation Support (ACTS)

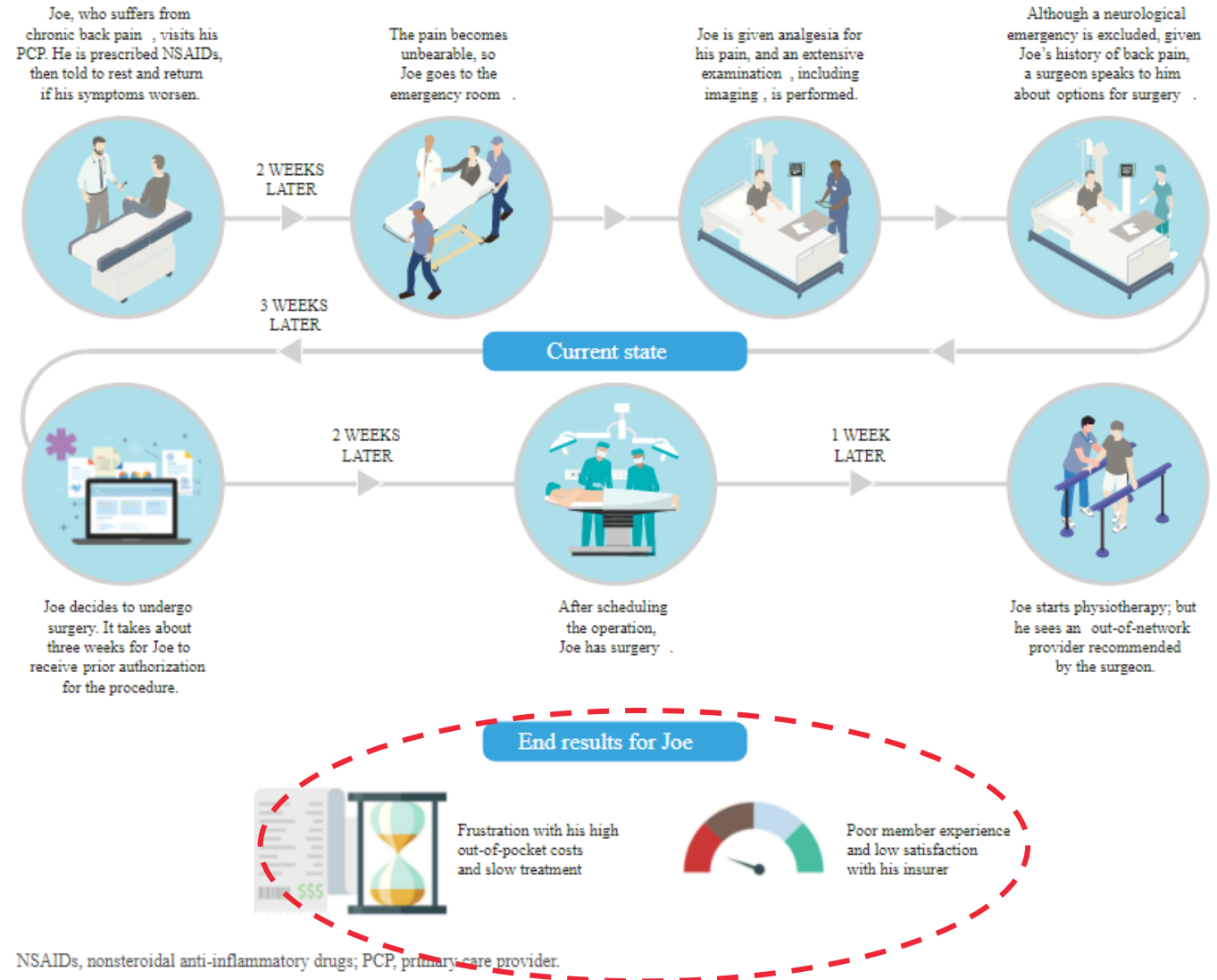
The Current State of the Healthcare Consumer Experience



A Patient Journey | Frustrating, Expensive and Slow to Outcomes

Example of a typical patient journey today

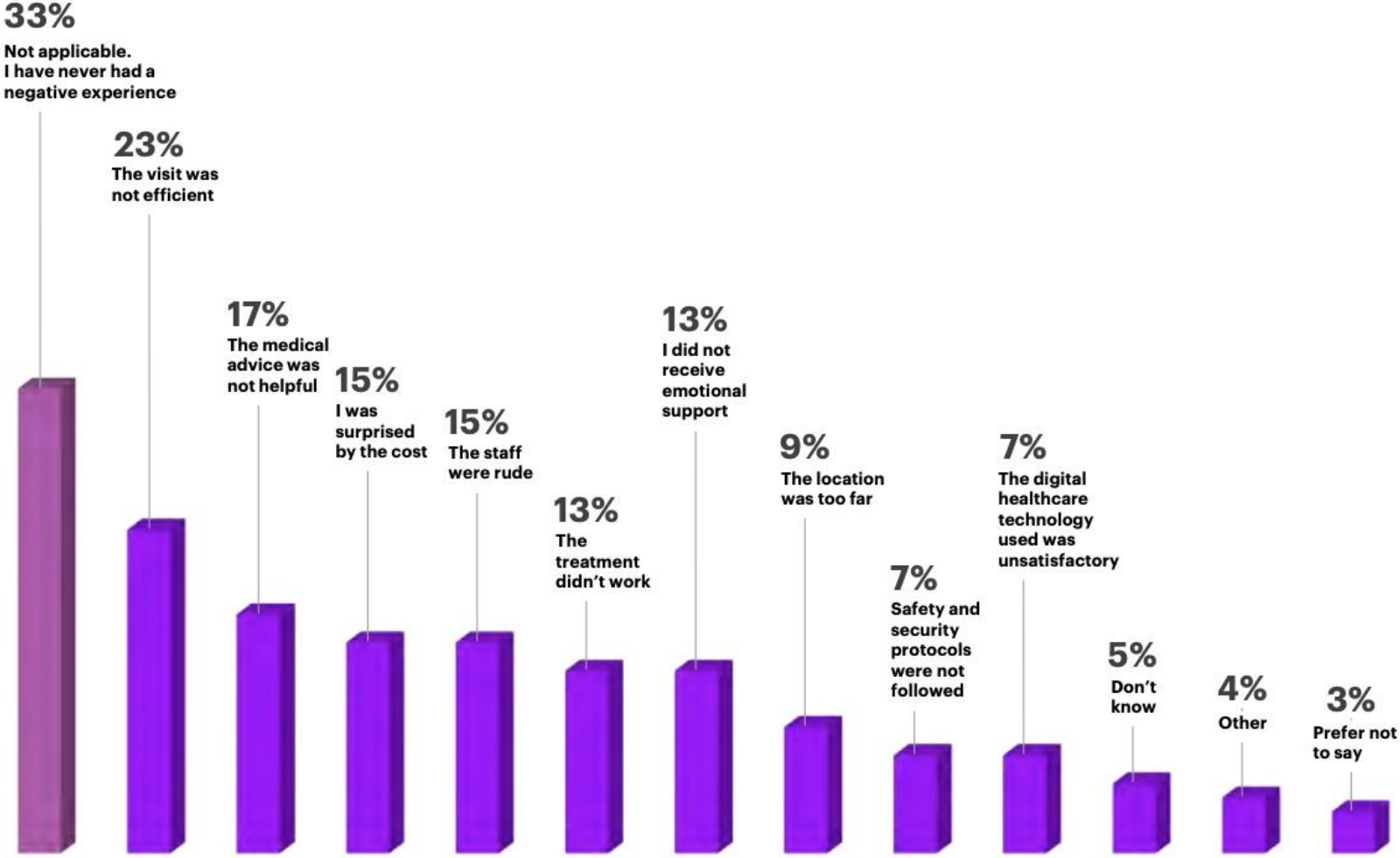
- Healthcare consumers are no different from retail customers: they want to be good consumers who can make informed choices about the care they receive and expect digital to be a core part of this engagement



Source: Cordina, Gilbert, Griffin and Kumar, "Next-generation member engagement during the care journey.", McKinsey, July 23, 2019.

Common Pain points in the Current Experience

Thinking about the last time you personally had a negative experience with a medical provider, pharmacy or hospital. Which, if any, of the following describe what made the experience negative?



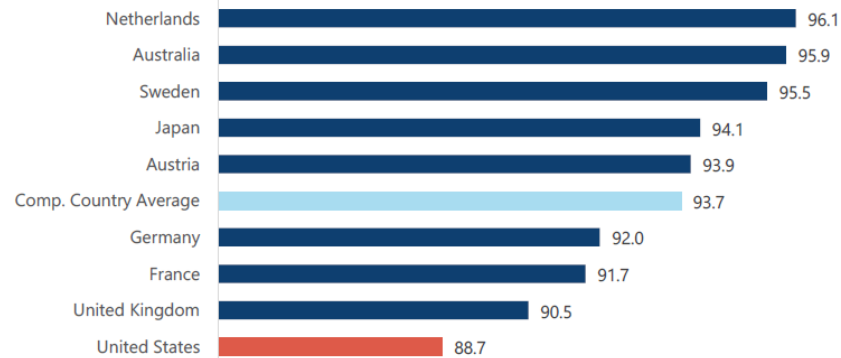
Source: 2021 Accenture Health and Life Sciences Experience Survey
n=11,823



Despite Leading the World in HC Expenditures, Quality and Access Does Not Compare

Exhibit 4 - Healthcare Quality & Access Index - US vs. Comparable Countries

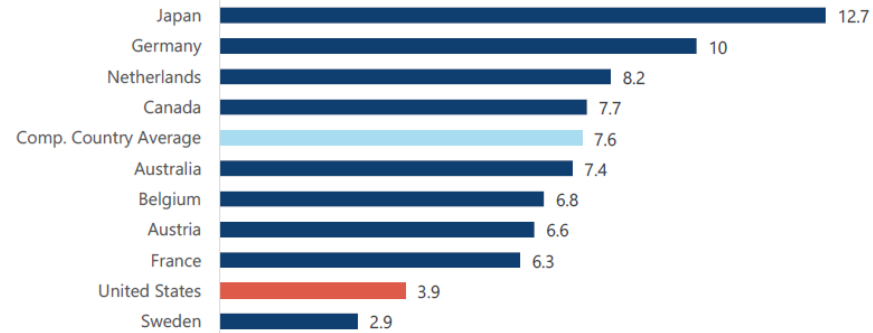
*2016



Source: Jefferes, KFF

Exhibit 5 - Annual Doctor Consultations per Capita - US vs. Comparable Countries

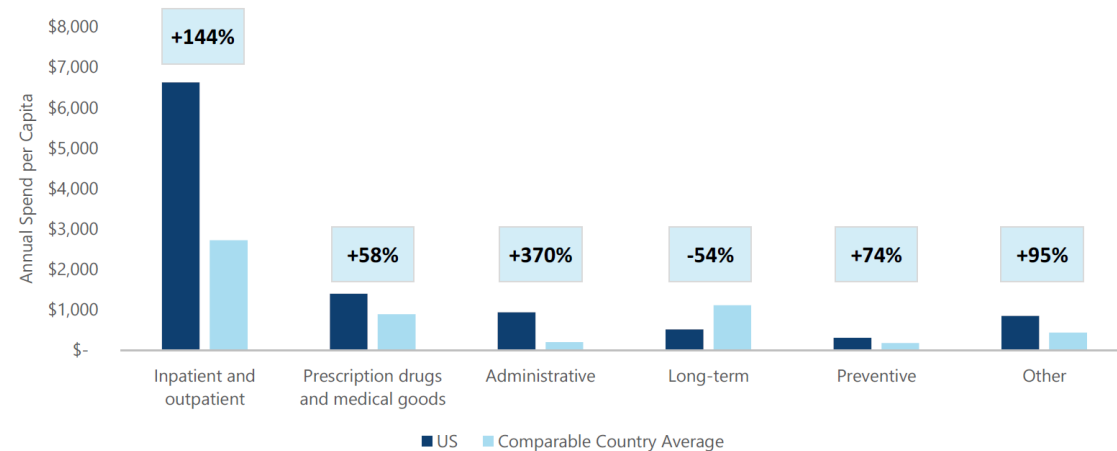
*2015



Source: Jefferies, KFF, OECD

Exhibit 6 - Per Capita HC Spending by Category - US vs. Comparable Country Average

*2018

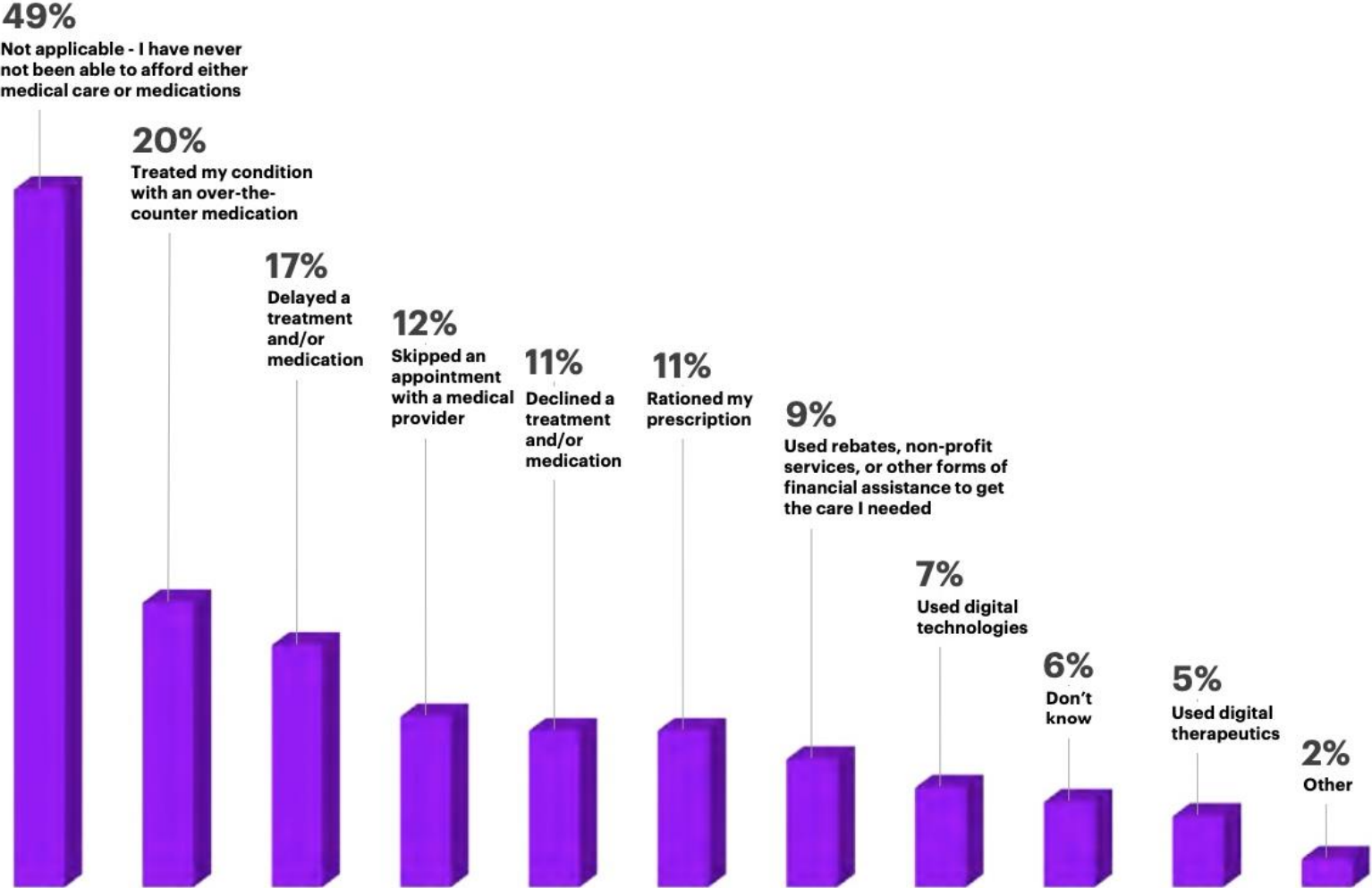


Source: Jefferies, KFF, OECD

Source: Jefferies equity research report, H/C Payment / Care Delivery Landscape Evolving as Value-Based Models Gain Ground, dated October 21, 2021.

Lack of Affordability Leads to Non-Adherence

Which, if any, of the following have you ever personally done when you could not afford either medical care or medications?



Source: 2021 Accenture Health and Life Sciences Experience Survey
n=11,823

2023 Healthcare Trends: What's Old is New Again

Increasing patient engagement by improving the patient experience

- Market size: \$USD 13.42 billion in 2021, 74.28 billion by 2030 (wearables, educational resources, mobile apps)
- Simplified processes and navigation, streamlined data access, administrative efficiency, human connection, digital experience, positive work culture

Addressing staffing shortages, clinical burnout, and employee retention

- WHO estimates an additional 18 million healthcare workers to achieve universal healthcare by 2030
- Flexible hours and leave, digital innovations, ergonomically friendly environments, and new roles to extend clinicians

Investing in mental health

- Global prevalence of anxiety and depression increased by 25% during the pandemic, according to WHO
- Preventive (mindfulness), digital therapeutics, care coordination and care management, telemedicine.

Focusing on healthcare inequalities with social determinants of health

- Integrated into risk based primary care and payment models
- Increased development, testing, and use of assessment at the patient level and quality metrics at the system/ population level
- Startups devoted entirely to SDoH connect high risk people to resources



Source: Healthcare Transformers: 10 Healthcare Trends for 2023

The Result: Patients Move With Their Feet, Changing Providers

5 key survey findings



Most patients look online to find healthcare providers.

3 of 4 people have searched online to find out about a doctor, a dentist, or medical care. **61 percent of people** do so either sometimes or often.



Reviews are the most influential online resource for patients.

When choosing a healthcare provider, **74 percent of patients** find online reviews very or extremely important. **69 percent** say they will not consider a healthcare provider with an average star rating lower than 4.0 out of 5.



More than half of patients prefer a digital connection with practices for five key interactions.

At least **51 percent of patients** favor digital interactions when: scheduling an appointment, filling out forms, asking a question, paying a bill, and accessing health records.



Patients strongly prefer text messaging for appointment communications.

Two-thirds of patients (66%) prefer text messages when receiving medical appointment reminders. Additionally, **59 percent** would like text message reminders to book their next appointment.



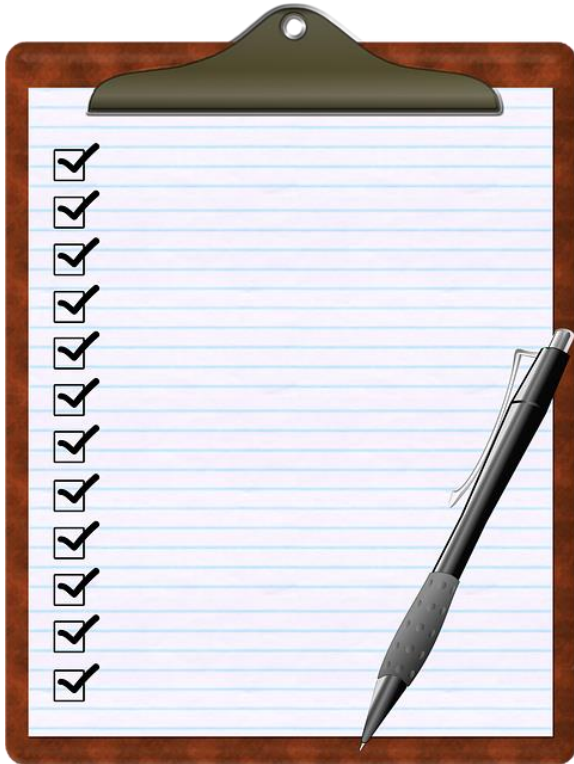
There has been a notable level of patient attrition at practices.

More than **one-third of patients (36%)** say they have left a healthcare provider in the past two years. **Eight of 10** did so because of a poor in-person experience and/or lack of access and communication.

Understanding Value From the Consumer Perspective



Five Main Characteristics Consumers Seek in Healthcare Interactions



1. Personal. How do we help foster personal connections for our partners?
2. Simple. How do we promote seamless and efficient experiences?
3. Timely. Time spent waiting in a doctor's office costs each of us \$43 on average. How can we increase efficiency to result in shorter wait times? Is access restricted?
4. Transparent. How can we help consumers understand what is happening to them and why? How much they will pay? How well each option works? Which provider is better?
5. Secure. How can we help people understand whether their healthcare data is secure?

Source: Deloitte Elevating Healthcare Consumer Experience

Engaging Healthcare Consumers

- Patient consumers want more control over their healthcare experience and expect convenient access to care

OPPORTUNITY 1: CONSUMERS WANT CONTROL AND CONVENIENCE

What does the survey tell us?



Finding quick and convenient appointment times were top challenges for consumers during COVID-19



78% of consumers want to be able to schedule their own appointments, at any time of day or night, from their home or mobile device



73% of consumers want the option of using a portal to communicate with their provider, schedule appointments and review their records



51% of consumers want telehealth options



Only **42%** of consumers feel the purchase experience [of healthcare services] is comparable to other services, such as retail, entertainment and automotive

OPPORTUNITY 4: EVERYONE IS FEELING THE PANDEMIC PINCH

What does the survey tell us?



Two-thirds of providers have a revenue shortfall due to the pandemic



10% of patients rank financial hardship/uncertainty of cost as top challenges when accessing care during the pandemic



69% of patients want accurate estimates before receiving non-emergency care



65% of patients consider it very important to know in advance if their care is covered by insurance



More than **25%** of patients have had healthcare expenses that were higher than expected, while more than half have seen final costs that differed from original estimates

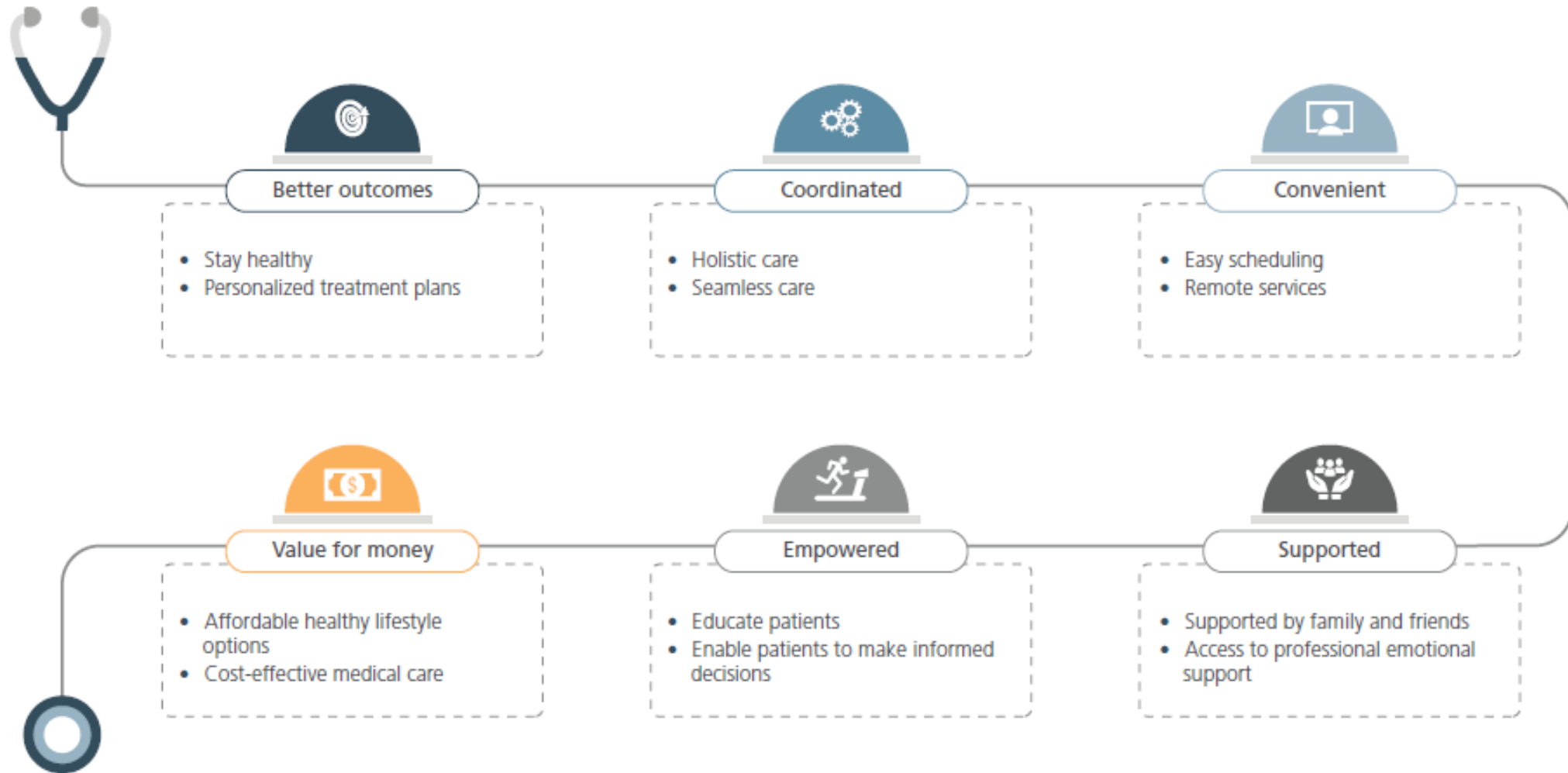


58% of patients would be interested in a payment plan that's tailored to their personal financial situation (rising to **72%** for 25- to 34-year-olds)

Source: The State of Patient Access: 2021. Experian Health.

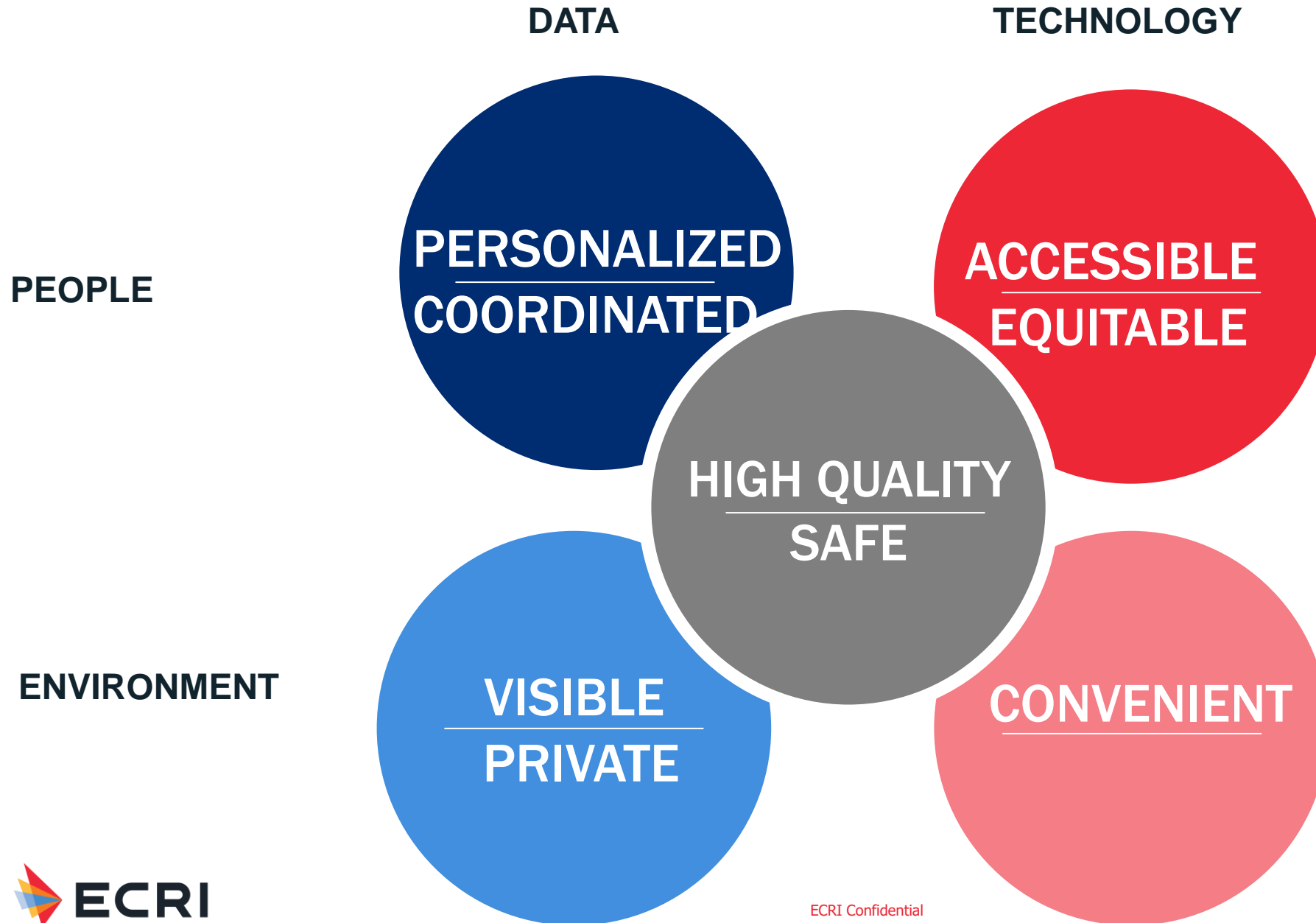


Person-Centered Healthcare | Where can your Organization Make an Impact?



Source: Newey, Young, Sridhar and Pawijit, "Unlocking the Benefits of Patient-Centric Healthcare", LEK special report, July 2020

Person-Centered Care: The Next Wave



Meeting the needs of the Healthcare Consumer



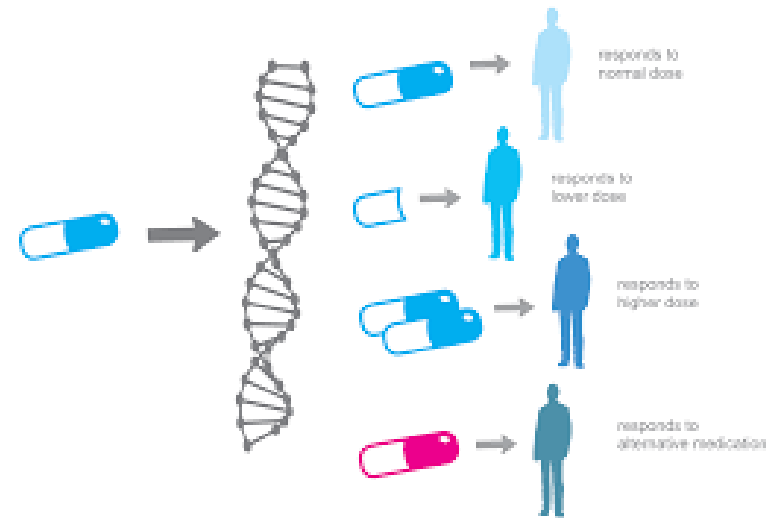
Convenient Care

- Considerations
 - Embracing virtual care and Alternative Sites of Service
 - Making episodic care effective across the spectrum of care (including wellness)
 - Expanding convenience beyond payment pathways
 - Technology supports efficiency



Personalized Care

- Considerations:
 - Uses individual data
 - Person-specific care plan and treatment options
 - Data flows across settings



Transparent and Secure

- Considerations:
 - Meaningful transparency of cost and quality outcomes
 - Security of the data collected and new and existing technology
 - Personalized health record inclusive of multiple sources of data (IoB)



HEALTH NEWS

Reports: Hospital websites collect consumer data, feds outline HIPAA violations

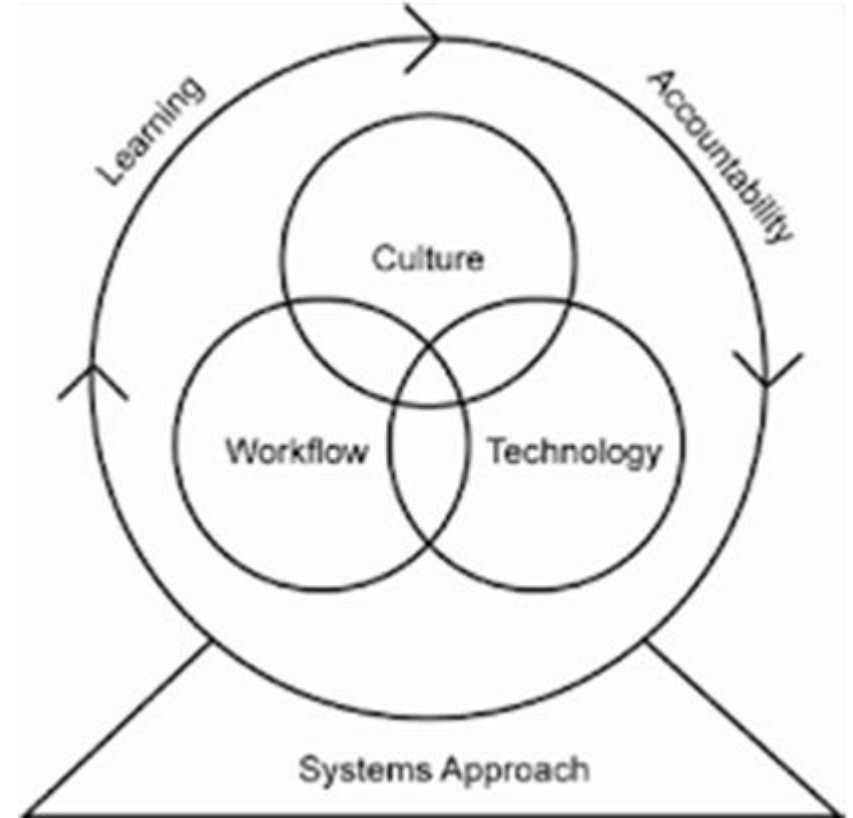
Accessible and Equitable

- Key Considerations:
 - Timely
 - Understandable
 - Addresses resource needs
 - Good outcomes for all



Safe and Effective

- Considerations:
 - The foundation of the consumer relationship
 - Increased technology offers opportunities to improve effectiveness, but also presents additional risks
 - Current healthcare environment requires a comprehensive system approach



<https://nam.edu/perspectives-2013-bringing-a-systems-approach-to-health/>

Meaningful Changes to Enhance the Future Healthcare Consumer Experience

- Move beyond the patient engagement survey as the primary source of patient input
- Create opportunities for meaningful consumer input into key processes
- Look beyond the “patient”
- Increase diversity efforts
- Remember your team members are your consumers as well
- Developing and following a Technology Roadmap that considers engagement opportunities with consumers across the full spectrum of care.

“It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change.”
- Charles Darwin

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