

Elevating the Patient Experience to Fuel Growth



Executive Summary

COVID-19 changed healthcare overnight and few payer and provider leaders were prepared. Health systems had to dramatically restructure operations—canceling elective procedures, creating new sanitizing protocols, building virtual care models and more. Patient volume plummeted and, consequently, revenue took a blow as operations underwent this transformation.



The patient experience was put on the back burner as organizations focused on freeing up capacity and establishing new protocols. Accenture's COVID-19 Consumer Health Experience Survey 2020 indicates that those health systems that evolve to meet new consumer experience needs can expedite financial recovery and capture patients from competitors, potentially increasing their revenues by 5% to 10% pre-COVID levels within 12 months—which, for a \$5 billion health system, would mean between \$250 million and \$500 million in additional annual revenues.

As people adapt to the ways in which the world has changed, patients who put off receiving care because of the pandemic are considering a return. While health systems have revamped operations to improve safety and make the return of patients possible, the patient experience must also be addressed to convince many to re-enter the system. If it is not made a top priority, patients are likely to switch to competitors, as our research indicates. This will further damage growth potential for the long term.

Patients are up for grabs

Many patients are looking for a safer, more secure and convenient experience, which has led them to delay care amid the pandemic—and they will switch providers if they aren't getting it according to our survey.

One in four patients who believe their health system is handling the COVID-19 crisis poorly plans to never receive the care they had previously been seeking or will wait at least a year. This number is three times higher than patients who said their system is handling COVID-19 well.¹ In contrast, patients who view their health system as exceeding expectations in handling the virus are more likely to return for services in the near term (27%, for instance, within a month).

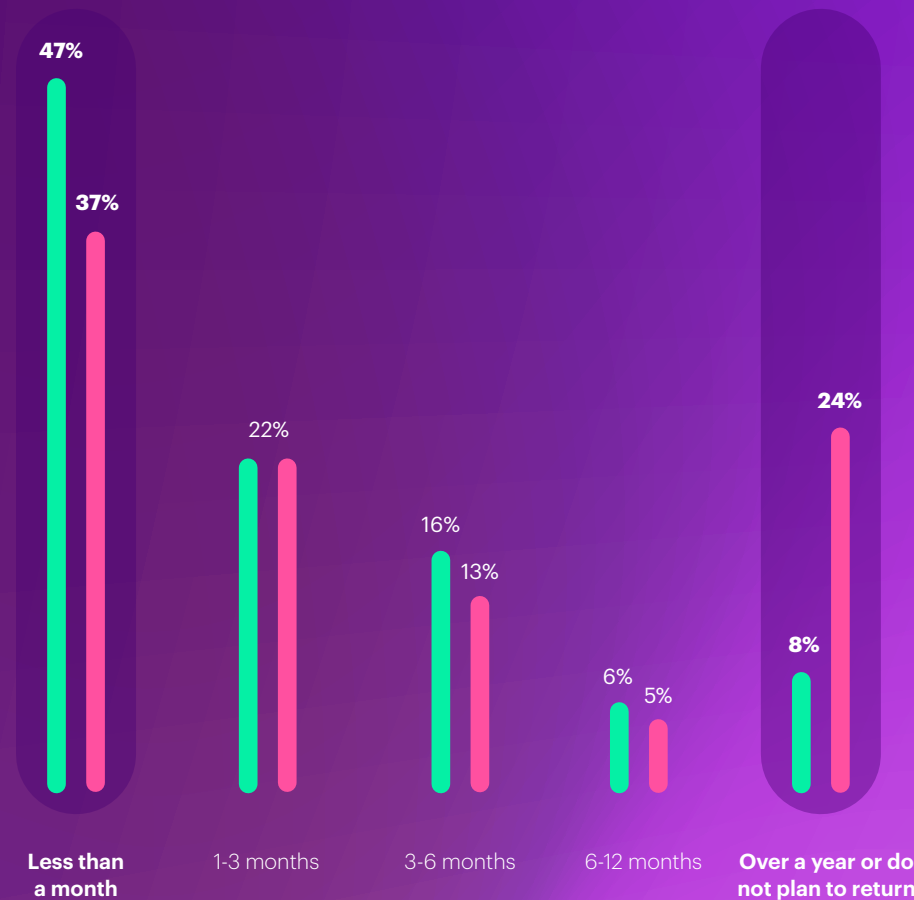




1 in 4 patients who believe their system handled COVID-19 poorly never plan to return or will wait at least a year

Figure 1.

Those who believe their health system handled COVID-19 poorly plan to never return, or they will wait at least a year.



- Believe healthcare provider exceeded expectations handling COVID-19 crisis
- Believe healthcare provider did not meet expectations handling COVID-19 crisis

Question: How soon are you likely to begin seeking healthcare services (hospital/physician/other) based on the timeline for lifting COVID-19 restrictions in your state, availability of care and your personal comfort with returning to receive care services?

Source: Accenture COVID-19 Consumer Health Experience Survey 2020





Perhaps most critical is that 64% of patients are likely—or highly likely—to switch to a new health system if their expectations are not met regarding sanitary and safety protocols, access to up-to-date information and the availability of virtual care options. ²



Health systems cannot afford to lose patients to competitors, especially since COVID-19 is showing no signs of slowing down and could present renewed financial challenges. While switching providers due to a poor patient experience is always a possible risk, it is especially so now as patients are evaluating whether to return and which system is best prepared to meet their needs.

The pandemic has amplified the need to deliver safe, convenient and accessible care—but patients aren't always aware of the measures providers have put in place. Personalized communications and targeted outreach should make clear to consumers what providers are doing to deliver care safely.



“In this new future of care, health systems need to provide effective, trusted, reliable care—both in person and virtually—while instilling confidence and demonstrating safety and respect. Otherwise, patients are likely to switch to other providers who are reinventing how healthcare services are delivered.”

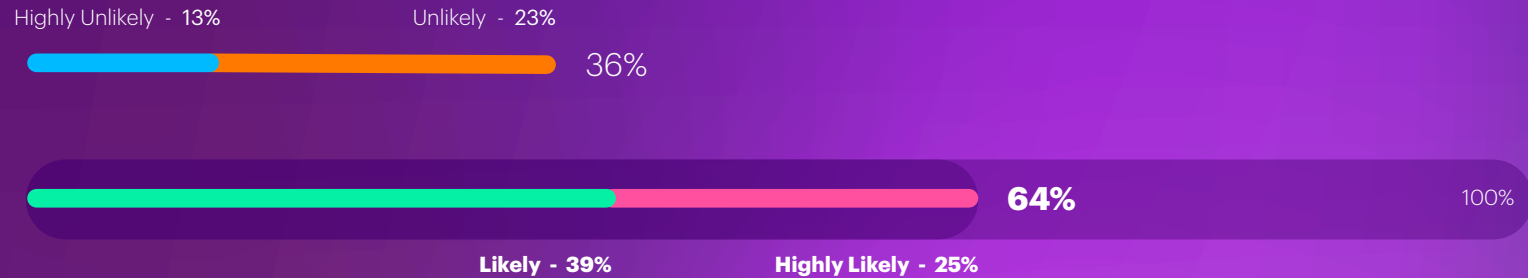
- Jean-Pierre Stephan, Accenture Health Customer Engagement Practice Lead



Two-thirds of patients are likely to switch providers if they do not meet expectations handling COVID-19

Figure 2.

Patients will switch providers if they do not meet consumer expectations for handling COVID-19.



Question: How likely would you be to switch to a different doctor, hospital or other healthcare facility if your expectations are not met for the following factors (sanitary and safety protocols, up-to-date information and virtual visit options)?

Source: Accenture COVID-19 Consumer Health Experience Survey 2020

Financial recovery and growth are on the line

Health systems that prioritize consumer experience and deliver on new expectations can both maintain their own patient base and grow market share by capturing switchers ready to leave competitors. As noted earlier, these organizations could potentially increase their revenues by 5% to 10% pre-COVID levels within 12 months.³

Time is of the essence. Given that a significant group of people is not planning to return for care over the next year, there is an opportunity to capture those patients before they go back to their previous providers. Furthermore, with the higher willingness to switch right now, patients who historically would not have been looking to go to a new health system are also up for grabs. Those with a higher likelihood of switching include patients seeking routine and preventative care and people with lower risk conditions.



Keep existing patients who:

- Have a history with the system
- Have exhibited loyalty in the past
- May not have interacted with the system recently
- Will consider switching if COVID-19 standards and protocols are not in place



Capture switchers who:

- Have historically been loyal to a competing health system
- Rethinking their loyalty and who can provide the best care experience
- Are highly willing to switch for leading sanitary and safety protocols
- Seeking regular, transparent communications and seamless virtual visit options

Poor customer experiences are costly

↑ | **+ 900 M**
STRONG PERFORMANCE

HEALTH SYSTEM WORTH



\$5B

↓ | **- 25%**
POOR PERFORMANCE

Health systems are already under financial duress, but delivering poor consumer experiences will only make it harder to regain their footing. The lowest performers may still be 25% below previous revenues within a year.⁴ Based on our analysis, for a \$5B health system, this difference between poor and strong performance could lead to a \$900M differential in net patient revenues over the next year.⁵

While rising consumer expectations were already forcing the hand of many health systems to improve communications, access and virtual care before the pandemic, COVID-19 has increased the stakes and heightened urgency surrounding these efforts. The pandemic has led to new standards for consumer needs that may remain long after the crisis has passed.



Four actions to elevate the patient experience and spark growth

The pandemic accelerated a journey that many health systems had already embarked upon to improve experiences for patients. This new era in care presents a major opportunity for healthcare organizations to not just get more patients in the door—but grow their business for the long term.

We have identified four ways to improve the patient experience, and therefore your path to recovery, during and after the pandemic.



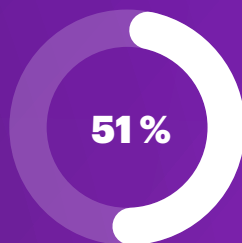


1

Alleviate patient concerns with personalized messages

All outreach should proactively—and in a personalized fashion—address the key causes of friction in a patient’s experience and their concerns about health and safety, such as protections and protocols in place to protect against in-person transmission. Communicate the specific actions the health system has taken to protect patients—whether offering separate entrances, allowing contactless payment and online paperwork, or even describing the advanced level of protective wear among staff.

Personalization is important as consumers trust messages from their physicians to a higher degree than messages from the health system overall (51% of consumers trust their physicians whereas only 42% trust their health systems).⁶ Where possible, communications should come directly from the physician than the health system.



of consumers trust their physicians

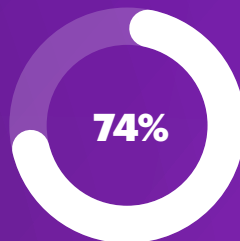




2

Meet them at the front door

Health systems can address unique patient needs and ease COVID-19-related concerns before a patient steps foot into the office or enters a virtual waiting room. This can be achieved by embedding new protocols and practices for safety and wellness throughout every interaction, whether it's finding a doctor, scheduling an appointment or completing registration in advance of a visit. For instance, 74% of patients are now likely to use online chat or texting to provide check-in information before their appointment, which helps minimize face-to-face interactions. ⁷



of patients are now likely to use online chat or texting to provide check-in information before their appointment



3 Enhance virtual care options

COVID-19 accelerated the need for virtual care, but many patients were looking for it before and will look for it after the pandemic. Many healthcare consumers (58%) are likely to use telehealth or virtual visits for future healthcare needs including preventative care or diagnosis of an illness or injury instead of going into the office or hospital.⁸ Health systems can develop new care models that meet patient demands for easier, more accessible virtual care - optimizing the capacity to care for virtual patients and enhancing the experience of virtual care delivery. For the less digitally savvy populations, offer support and guidance on aspects as simple as how to turn on the camera or how to log into a secure visit.



of healthcare consumers were likely to use telehealth or virtual visits for future healthcare needs




4

Listen through social channels

Continuous listening across social channels in a health system's local market, and nationally, will enable gathering real-time insight into patient perceptions and community sentiment. In response, healthcare organizations can quickly pivot their operations to address shifting consumer mindsets and realities—and measure progress along the way.

By reviewing community sentiment about the virus, a large academic medical center discovered that the patient population was confused about COVID-19 symptoms compared to symptoms of allergies and other illnesses. The institution quickly published content to clarify what COVID-19 symptoms were and how to seek help if patients suspected exposure. Content can help to highlight changes being made in the physical space, address confusion over misinformation that could be spreading online and inform the public on topics most relevant to them including how to make an appointment, where to get tested and how to stay safe.



COVID-19 created an inflection point. Patient experience has always mattered, but now the stakes have escalated and health systems that don't respond to new consumer demands are at a greater risk of losing patients to competitors. Now is the time to transform to grow market share by exceeding patient expectations.

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About the Accenture COVID-19 Consumer Health Experience Survey 2020

Accenture mandated the survey of more than 4,639 U.S. adults about COVID-19 impacts to consumer trust across providers and payers, drivers of consumer willingness to return to in-person care, utilization of virtual care, and likelihood of future use of virtual care. The survey was conducted online in June 2020 and was managed by Dynata.

