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Patient Engagement:

Think your patients are loyal?

Think again.

High performance. Delivered.

The evolution of digital health makes earning consumer loyalty more important than ever.

Realities of the new healthcare market—consumers with high passion for healthcare providers, the rise of digital health disruptors, and providers with lagging loyalty metrics—make providers vulnerable to patients switching to competitors. By adopting consumer engagement practices from leading consumer industries, healthcare providers can respond to this market disruption, keep the patients they have and earn new ones.

Healthcare consumers have passion—but that's not loyalty

Healthcare evokes more consumer passion than any other industry, according to Accenture's 2014 Global Consumer Pulse Research. Eighteen percent of healthcare consumers say they are passionate about the industry, followed by consumer electronics (16 percent) and hotels and lodging (15 percent).[1]

However, high passion is not a substitute for loyalty. In fact, it often generates less loyalty

(Figure 1). This is a pattern in competitive consumer industries where high passion has translated into higher consumer expectations that influence people's willingness to switch to get what they want.

Some industries make it harder for consumers to switch, keeping switching rates artificially low and reducing incentives for companies to earn their customers' loyalty. Competitive consumer industries know they must earn consumer loyalty because it is easy to switch.

Switching is hard—but made easier with digital health

Many healthcare consumers stay with their providers because they think it would be hard to leave, not because they are loyal. In fact, 40 percent of healthcare consumers say that switching is a hassle, second only to gas and electric utility companies (53 percent).[2] (Figure 2)

Digital health capabilities such as electronic health records, consumer portals and online appointment scheduling increase health data sharing, healthcare price transparency and information access. Virtual health—including video appointments and e-visits—introduces convenient, personalized care options that depend less on in-person interactions.

As these digital health experiences and capabilities become more prevalent, it will become easier for patients to switch providers and flee to other doctors or hospitals in even greater numbers. Healthcare providers need to prepare now to combat this disruption and start implementing cross-industry loyalty strategies to earn their patients' loyalty.

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Recommendations matter most in healthcare—but healthcare lags other industries

In competitive consumer industries, a consumer's willingness to recommend, translated into a Net Promoter Score[SM] (NPS), is often used to measure consumer loyalty.

Accenture's research shows that consumers are less likely to advocate for their healthcare providers than for their banks, hotels, consumer electronics and retail companies. They are also about twice as likely to be ready to complain about them. This has translated into significantly lower NPS for healthcare providers compared to scores for other consumer retail industries (Figure 3).

The combination of fewer recommendations and more complaints is a loyalty liability for healthcare providers. Recommendations not only signal how satisfied current patients are, they are vital for acquiring new patients. Accenture research shows that 44 percent of consumers choose their healthcare provider based on personal recommendations, and that these recommendations drive a consumer's selection in health more than in any other industry. Only hotels and lodging comes close at 39 percent.[3]

A new kind of digital patient engagement

Rather than being disrupted, healthcare providers can be the disruptors. They can use digital health capabilities to drive patient loyalty and growth.

This new kind of digital patient engagement requires a new mindset and a new toolset. To achieve this, healthcare providers must focus on three key imperatives:

1. Give consumers reasons to stay
Take steps to profile and target consumers to offer the experiences they crave. This includes easing appointment access via online and call center scheduling, appointment delivery via in-person or virtual visits and personalized follow up via EMR or texted instructions.

Figure 1: Passion and switching rates by industry: Consumers have high passion for healthcare providers and high rates of switching.
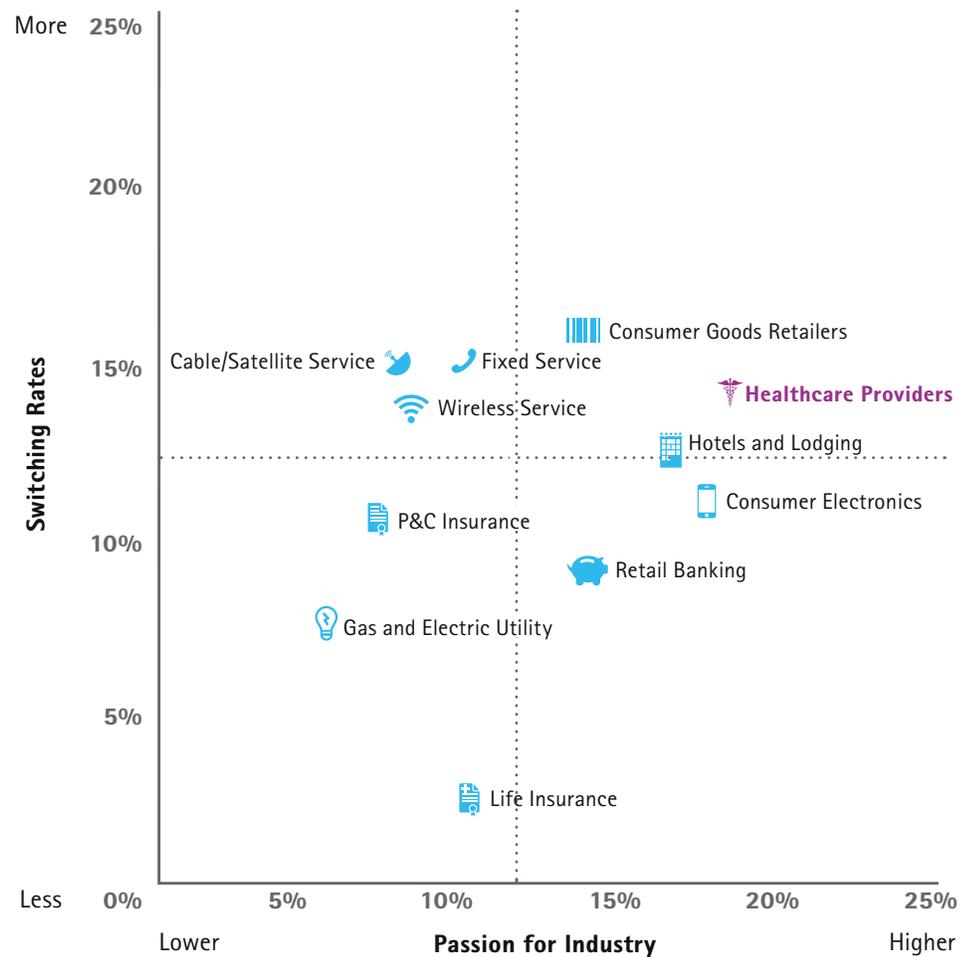
Source: Accenture analysis

2. Earn and enable consumer recommendations

Communicate and reinforce service strengths while listening and integrating to consumers' improvement suggestions. Make it easy to post reviews and ratings to reach others through digital channels and social media.

3. Make it easy for consumers to choose you

Enlist others to advocate, share and post about the health system. Provide channels for patients' friends and families, referringproviders, staff and allied professionals to endorse, refer and recommend. Design first-time experiences that include getting to know consumers personally, then follow up with tailored outreach and seamless record transfers and scheduling.

Transforming to drive growth and earn loyalty

Healthcare providers can take advantage of disruptive forces changing consumer relationships. Those who fail to transform these relationships should prepare for patients to walk out the door—straight to the competition.

The choice is clear. By adopting patient engagement practices from highly competitive industries that have always had to work hard to keep customers loyal, healthcare providers can earn consumers' loyalty in entirely new ways. Winners will earn loyalty through transformed experiences, not by trapping consumers.
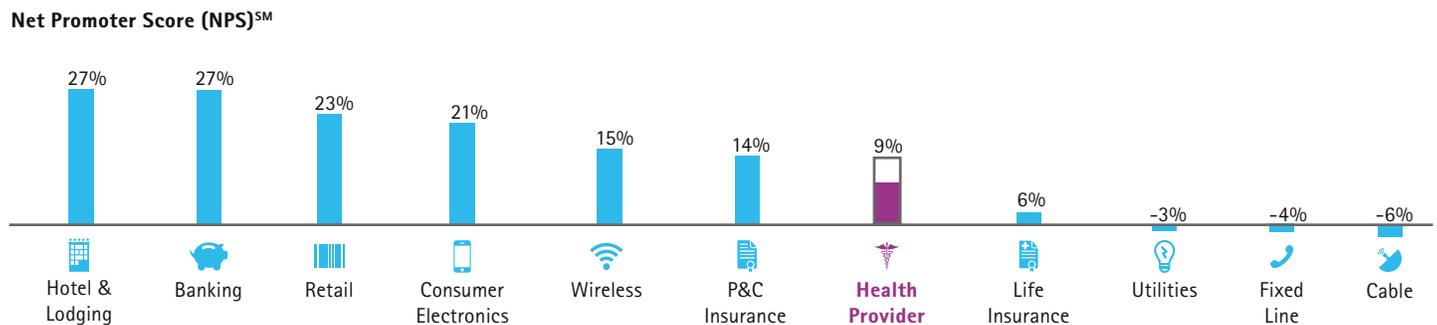
Figure 2: Across industries, consumer loyalty is a function of how easy or difficult it is for consumers to switch.

| | Harder | Ease of Switching | Easier |
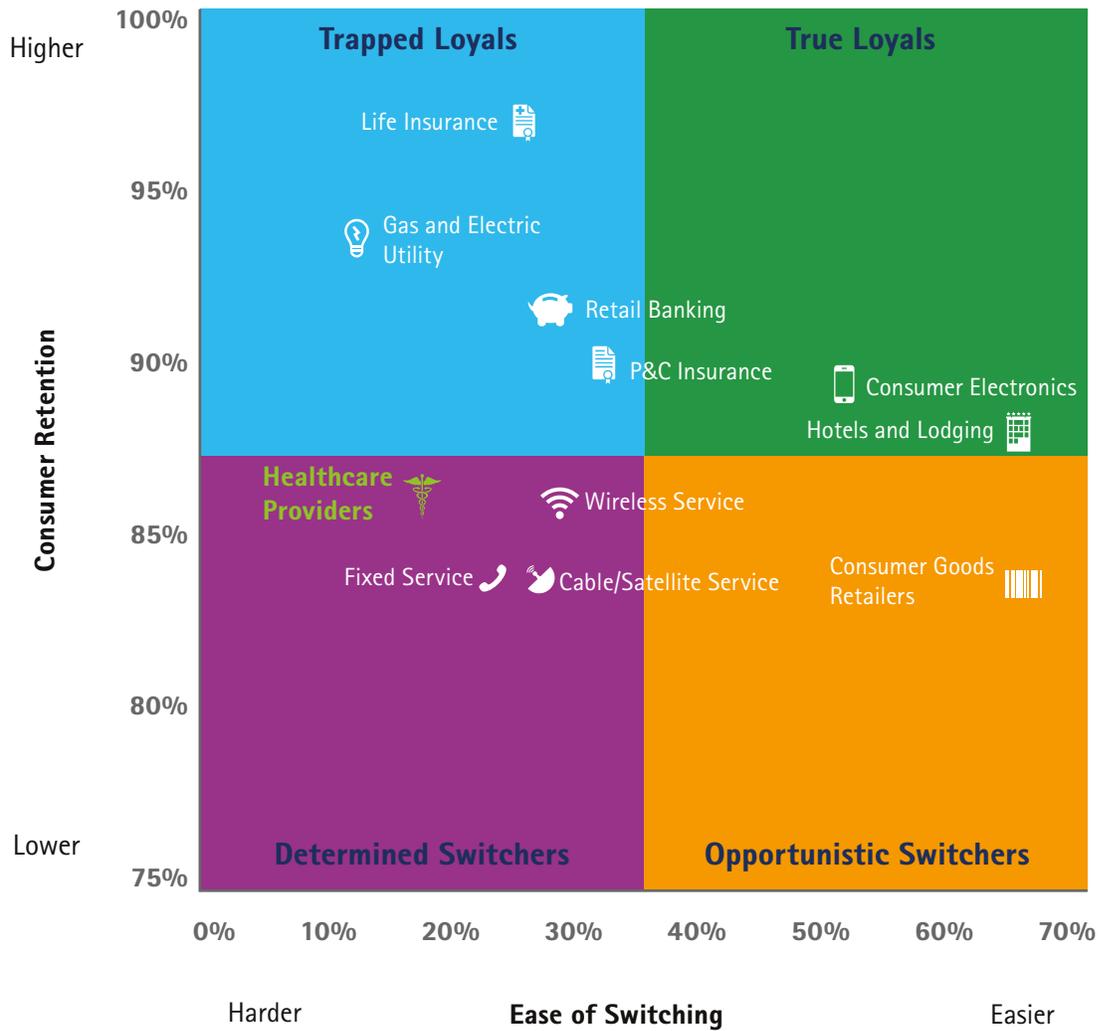
Source: Accenture analysis

Figure 3: Healthcare providers have lower NPS than many other industries.

Net Promoter Score (NPS)[SM]

Hotel & Lodging	Banking	Retail	Consumer Electronics	Wireless	P&C Insurance	Health Provider	Life Insurance	Utilities	Fixed Line	Cable
27%	27%	23%	21%	15%	14%	9%	6%	−3%	−4%	−6%

Note: NPS is calculated by subtracting bottom 3 boxes (detractors) from top 3 boxes (promoters); different from Satmetrics.

Source: Accenture analysis

[SM] Net Promoter, NPS, and the NPS-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld.

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Methodology

Accenture analyzed the findings from the Accenture 10th Annual Global Consumer Pulse Research to understand consumer behavior, preferences and attitudes as they pertain to healthcare in the US. Survey responses were analyzed across a variety of demographic segments, including respondent geography, gender and age group. The Accenture Global Consumer Pulse Research is an annual research project that assesses consumer attitudes toward the customer experience (including marketing, sales and customer service practices) and consumers' behaviors in response to companies' practices. In 2014, Accenture conducted an online survey of 23,600+ end consumers in 33 countries, asking them to evaluate ten industry sectors (up to four industries per respondent).

About Net Promoter Score (NPS)

Net Promoter Score (NPS) is a commonly used measurement of organizations' consumer loyalty and has been highly correlated with financial success for leading companies. It is based on the premise that consumers' willingness to recommend an organization indicates future consumer behaviors that drive revenue growth and value for the organization.

To determine NPS, organizations subtract the percentage of detractors (consumers who are most likely to speak negatively when asked if they would recommend) from the percentage of promoters (consumers who are most likely to make positive referrals).

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