

Brave New World

Exploring Post-Election Healthcare Through the Eyes of Consumers

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Prepared for Kentucky MGMA



“consumer”

“patient”





**What is the difference
between consumers
and patients?**









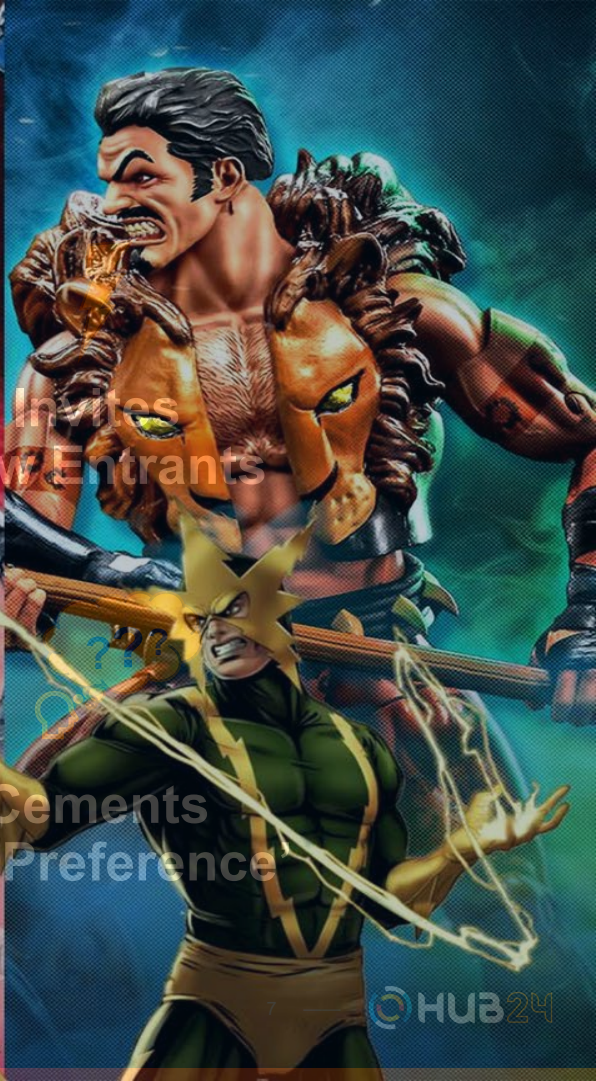
Justifies
Care Deferment

Invalidates
Expectations



Solidifies
Brand Blur

Amplifies Pain
of Paying



Invites
New Entrants

Cements
'No Preference'



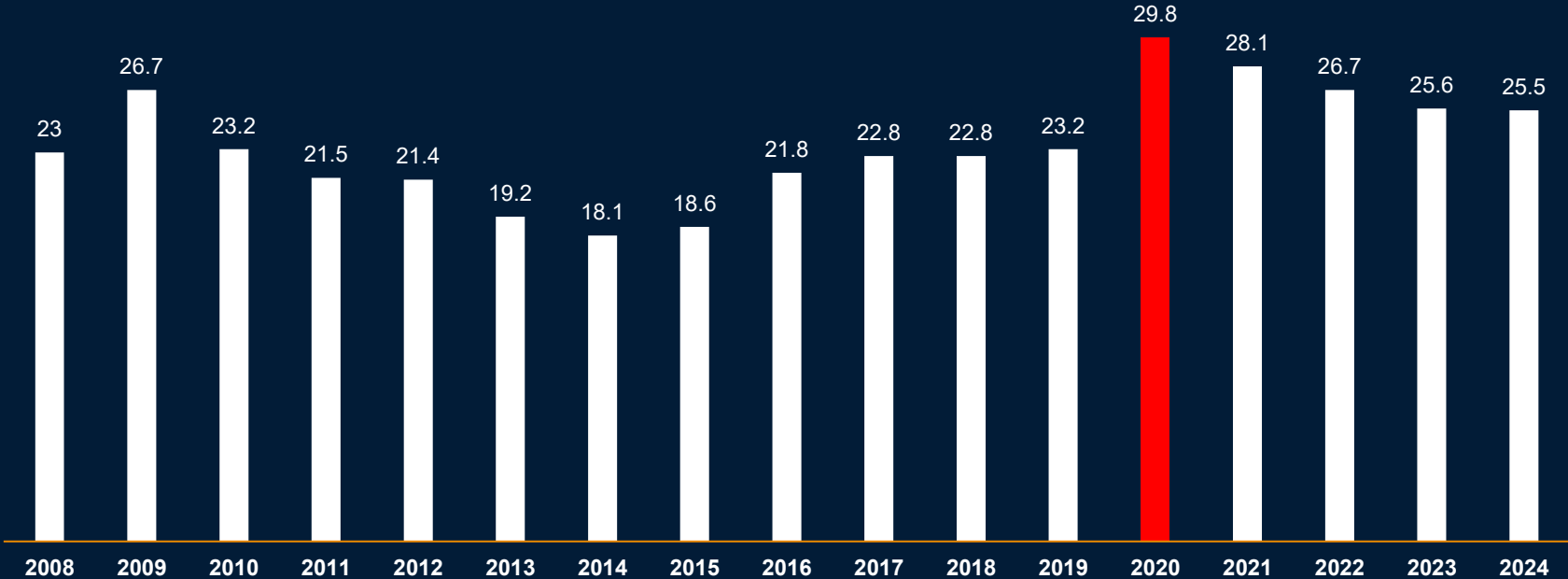
Justifies
Care Deferment

“Never put off till tomorrow
what can be done today.”

- Thomas Jefferson

Healthcare Deferment Remains Heartbreakingly High

Have you or someone in your household delayed necessary medical treatment in the last six months?



Source NRC Health's Market Insights study of healthcare consumers, national, 2008-2023

Healthcare Deferment in the State of Kentucky

- Kentucky statewide deferment in 2024: **26.9%**
- Clearly deferment is an issue in Kentucky (higher than the national average)
- Top reasons cited: related to cost (or ‘perceived cost’)
- Sometimes the competition isn’t another hospital



Why do would-be patients
delay necessary care?



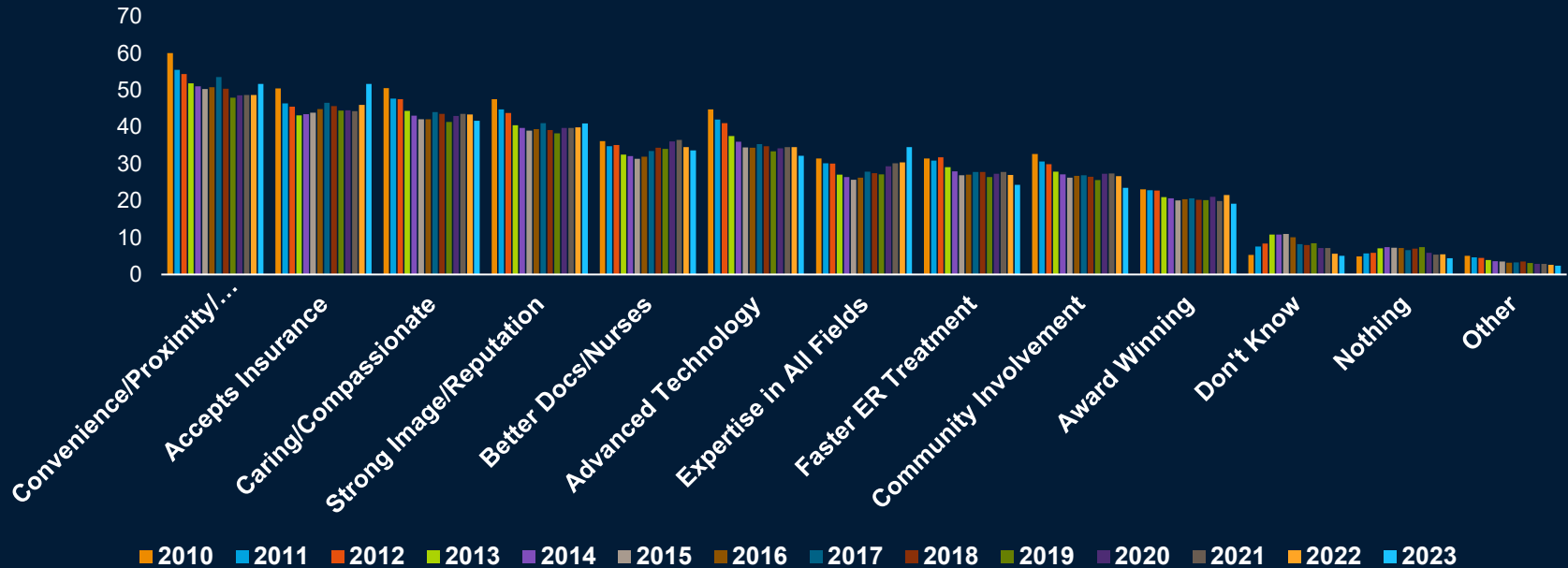
Solidifies Brand Blur

“Who are you (who) (who)
(who) (who)?”

- The Who

Brand Differentiators Continue to Languish Nationally

Based on what you know, what factors stand out in your mind as things your [top of mind] hospital does that sets it apart from others?



Source NRC Health's Market Insights, national market trend, 2010-2023, average annual n = 284,111

Brand Differentiators in the State of Kentucky

- In Kentucky the #1 differentiator is **accepts insurance**
- Second place goes to **convenience** and third place goes to **compassionate care**
- Kentucky's top 3 are the same as the US top 3 but 'accepts insurance' leaves more to be desired among discerning consumers



Which brand differentiator
have you promoted most?

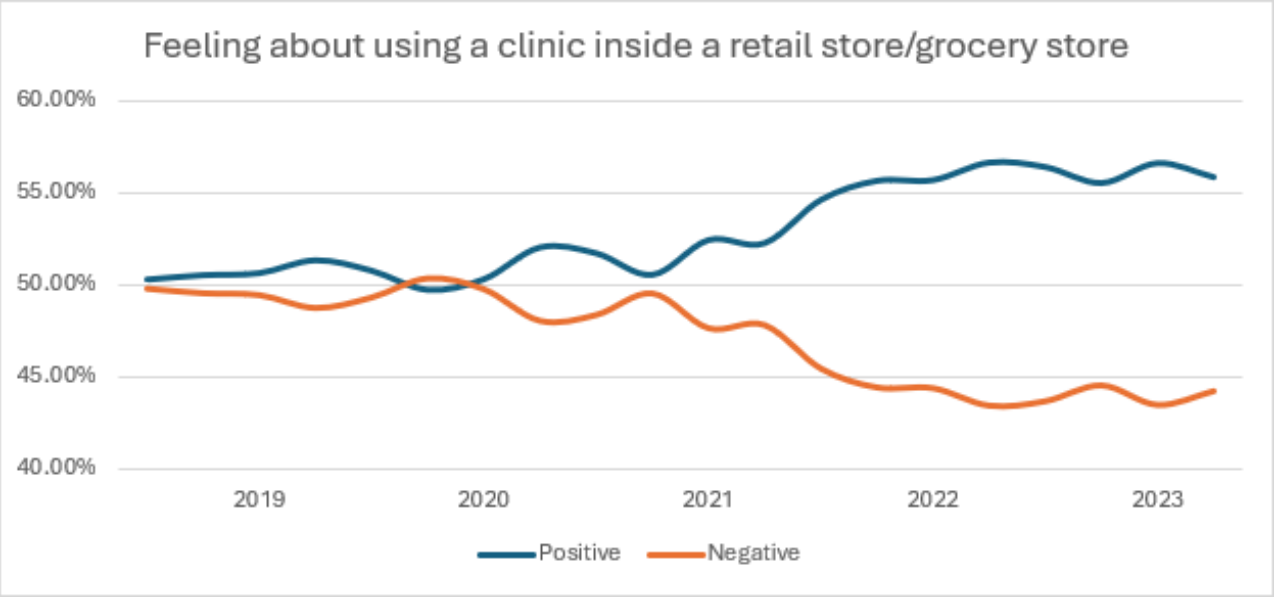


Invites New Entrants

“I’ll huff, and I’ll puff, and I’ll
blow your house down.”

- The Big Bad Wolf

Retail Care Enjoys Growing Positive Sentiment



SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2019-2023

Retail and Primary Care Drivers in the State of Kentucky

- In Kentucky, **56 percent of consumers** would be excited to get care in a retail setting – so long as it is provided by a hospital or health system they are familiar with
- Besides insurance acceptance, top 3 drivers of primary care are location, appointment availability, and friendliness of office staff (how much do we focus on the third...?)

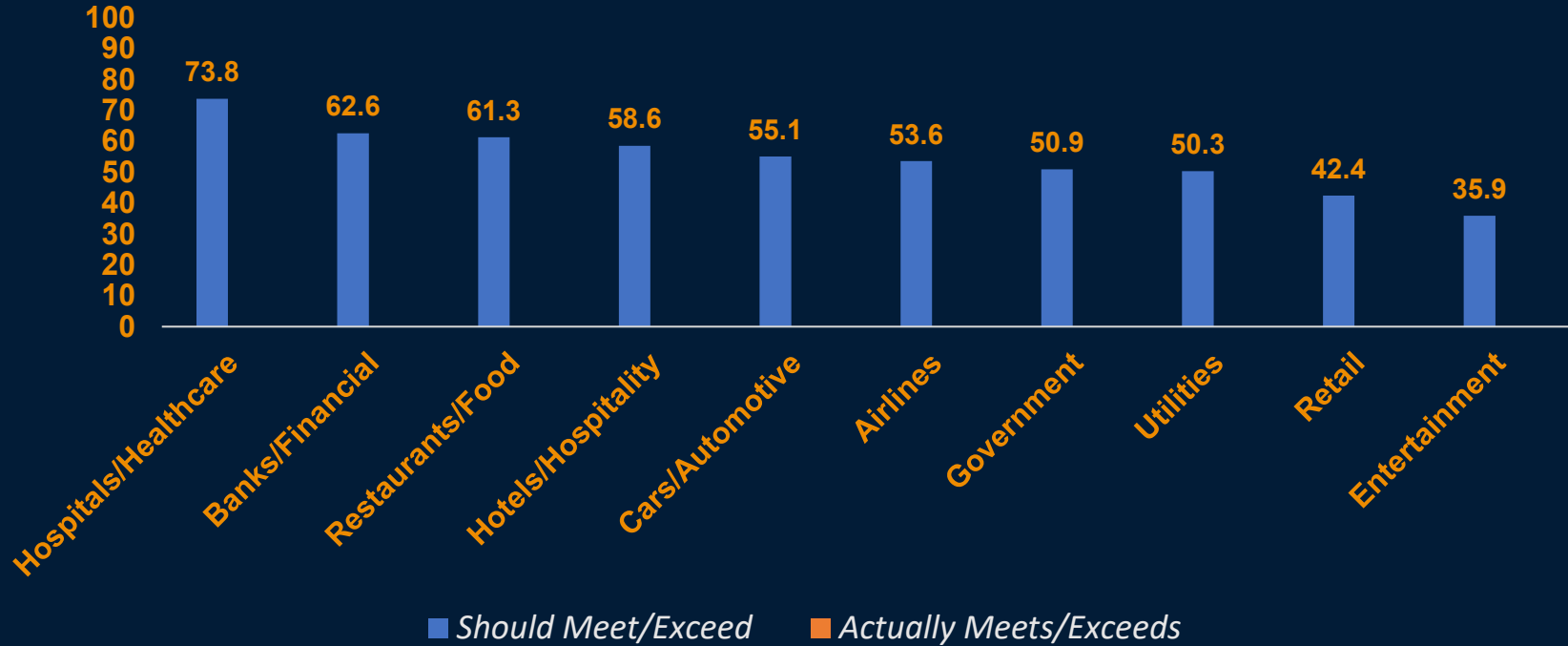


Invalidates Expectations

“Expectation is the root of all
heartache.”

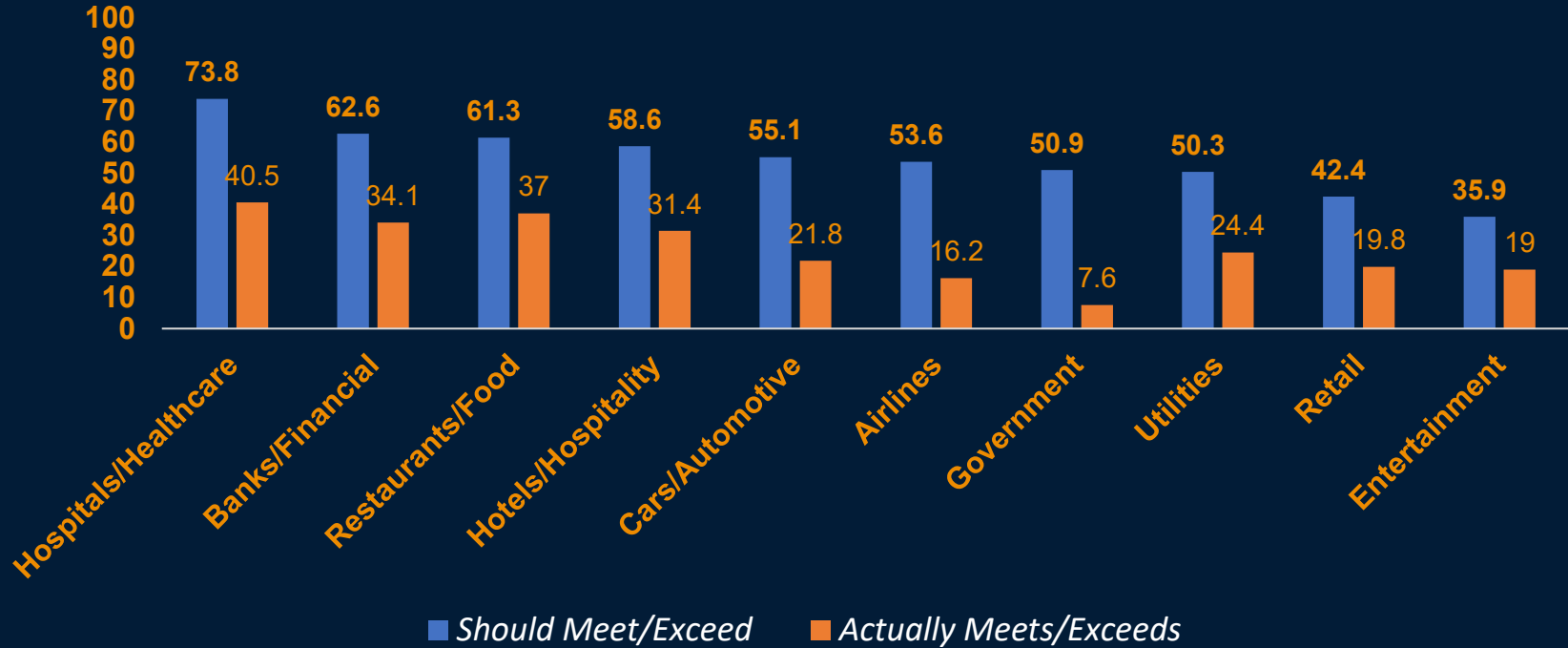
- Shakespeare

Expectations of Healthcare vs. Other Industries



SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845

Expectations of Healthcare vs. Other Industries







Do you know your future
patients' expectations?



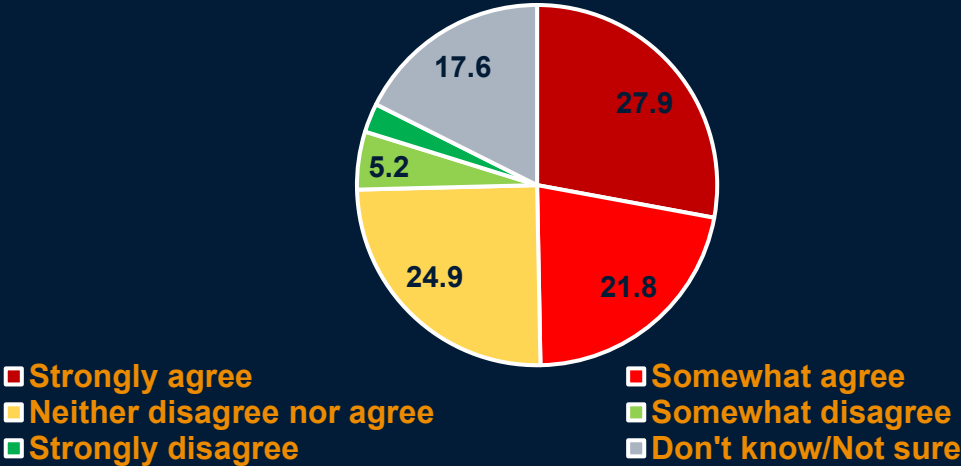
Amplifies
Pain of Paying

“I’m alright, Jack, keep your
hands off my stack...money.”

- Pink Floyd

How Much is Healthcare Tied in with Inflation?

Agree or Disagree:
Prices charged by doctors and hospitals have risen just as much as other expenses (gas, food, rent, etc.) over the past year?



SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2022-2023, n size = 75,364

The Pain of Paying in the State of Kentucky

- In Kentucky, only **17 percent of consumers** say cost has ‘no impact’ on their selection of healthcare providers
- Only **1 in 5 consumers** have found the cost of a healthcare treatment before deciding to move forward
- If forced between keeping down out-of-pocket costs or continuing to see their doctor of choice... **48%** would stay with their doc, **31%** would choose cost, **21%** don't know



Cements 'No Preference'

“If you do not know where you
want to go, it doesn't matter
which path you take.”

- Lewis Carroll

In 2021, the percentage of consumers indicating “no preference” for a health brand plateaued.



NO HEALTHCARE
BRAND PREFERENCE

34.5%

-1.5% change | 36% Jan 2021

Consequently, healthcare organizations must strive for seamless connectivity between service recovery and missed patient expectations, driving caregiver recognition and positive comments on social media to enhance reputation. Now is the time for hospitals and health systems to use meaningful advertising and aim their messaging at patients in a personalized way that adds value to their life.

No Preference in the State of Kentucky

- NRC Health maps service line preference and in Kentucky there are several service lines with higher no preference:
 - Bariatric - 46 percent
 - Mental health - 42 percent
 - Senior services/living - 42 percent
 - Sports medicine - 36 percent
- No preference means opportunity remains and the PX is not the end-all-be-all of preference formation



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Which of the Sinister Six is most solvable and why?



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First, we change.
Then we change the industry.
Then we change the world.

- Patient No Longer (page 195)



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Patient No Longer: Why Healthcare Must Deliver the Care Experience That Consumers Want and Expect

Ryan Donohue, Stephen Klasko, MD
ISBN: 978-1-64055-180-0
Softbound, 179pp, 2020
Order Code: 24151
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**“Patient No Longer”
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