How can providers drive patient engagement and loyalty?

Accenture surveyed more than 8,000 US consumers at least 18 years old who had sought or received care in the prior 12 months to understand how touchpoints, and to understand key drivers of selection and switching behaviors.

their healthcare providers perform across 10 key healthcare consumer Here are the key findings:

The key factors driving patient engagement and loyalty are access, ease of doing business, digital engagement and trust.

Experience factors are driving an upswing in switching, requiring organizations to re-evaluate their service models and strategy.

Our research also tells us that leading companies that prioritize customer-centric service as a value center achieve 3.5 times¹ the revenue growth compared to those treating it as a cost center.

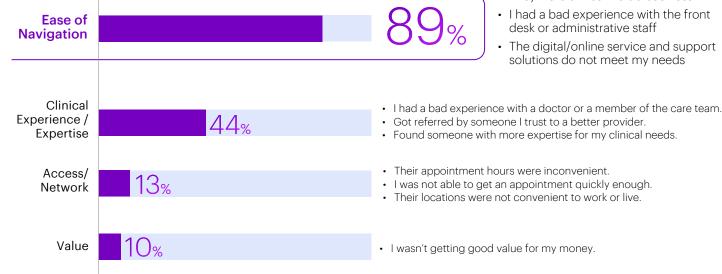
(c) B

Experience factors drive patient switching

Ease of navigation is the top reason cited by the majority of switchers more than double the rate of switching due to poor clinical experience.

switched or stopped seeing your previous healthcare provider?

Which of the following best describes the reason(s) why you



- They were difficult to do business with • I had a bad experience with the front

 - The digital/online service and support solutions do not meet my needs

Access

Access is the top factor driving patients' selection of a new provider.

Access

weekend and evenings Quickly able to get an appointment, with online option Digital, mobile or social

Convenient location

and hours, even

media interaction Telehealth and virtual care appointment offerings Customer service

53% Trusted source

> or friend referred Proactive and engaging communications Promotion or advertisement

Trusted primary care

physician, specialist

33% Coverage/Cost

directory Out-of-pocket costs Price transparency tools show cost before my visit

Listed in my health

O insurance provider

26%

image

Reputation/Brand Reputation/Trusted

Focus on sustainability,

social responsibility

and/or diversity

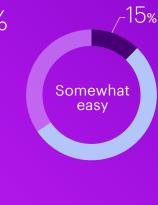


Take it easy

People who find their providers very easy to work with are 84% more likely to stay than those who find them difficult to work with.

How easy is doing business?

Very easy







■ Definetely ■ Somewhat likely ■ Unlikely

Highly digital people are the most likely to be loyal, find providers easy to work with and trust them.

Complete trust Likely to stay

Digital engagement

■ Highly Digital ■ Other Digital

\tag{\mathred{P}}

Easy doing business

What does it mean to be digitally engaged?

Low Digital Selectively Digital

traditional channels and interactions. Even then, they leave digital traces.

switch to traditional channels based on experience.

Mostly Digital

methods to engage and demonstrate a preference for omni-channel experiences.

91%

They prefer to rely on They engage in digital for utility and convenience but readily

They are more likely to attempt to leverage digital **Highly Digital** They make digital part of all dimensions in their life and are likely to have a "digital first" approach to

methods fail or are unavailable.

engagement-only falling back to traditional channels when digital

Digitally enabled

Trusters are 6x more likely to stay with their

Trust

those who don't trust their providers at all.

providers than other categories, and they

are almost 45x more likely to stay than

16% average 31% 2% Truster Distruster Neutral Patient satisfaction across

treatment Are clear about treatment and what it requires Have doctors and care teams that work well together and answer questions

People trust providers that... Make them feel heard and informed about diagnosis and

touchpoints for trust **Received Services Find a Provider**

Most impactful

Diagnostic Testing Decide Treatment

touchpoints impacts perceived experience and ability to trust and

promote an organization.

Those who are satisfied with the services they received are

4.6 times more likely to trust their providers

Those who are satisfied with finding a provider are 4 times more likely to trust their providers

Those who are satisfied with diagnostic testing are

3.8 times more likely to trust their provider

Those who are satisfied with deciding on treatment are 3.7 times more likely to trust their providers

60%

NPS measures customer loyalty based on the premise that consumers' willingness to recommend payers indicates

The "loyalty gap" is wide

future behaviors driving business growth and value. Net Promoter Score (NPS) as an indicator of loyalty

• Ease of doing business · Level of digital engagement

 Trust Meanwhile, patients of low-NPS performers are more likely to switch.

· Likelihood to stay

Patients give high ratings to high-NPS performers across a wide array of related experience factors, including:

Top

quartile

NPS for Target

Systems

1 Accenture survey publication