



**I don't want no
satisfaction**

The **truth** about patient satisfaction—we shouldn't settle for it

Satisfaction as a metric masks people's true feelings

American health attitudes can be more accurately examined through a frame of **frustration**, **anxiety**, and **luck**

Despite widespread negativity surrounding the healthcare system that suggests turmoil and unhappiness, most people feel optimistic about their health and satisfied with their care.

- Intense negativity towards the healthcare system is no secret – 70% of people said the US Healthcare System was in a “State of crisis”/had “Major Problems” (*Gallup, 2018*).
- Yet, people overwhelmingly report being as healthy (or even healthier) than average – whether they have a chronic condition or not.
- And, they report high satisfaction with their healthcare experiences, and rate their services and doctors especially favorably.



The tenor of today's cultural conversation makes it surprising when we see suspiciously high “satisfaction”. If the negativity isn't coming out of people's general experiences getting care, then something else must be driving the negativity.

Knowing that the healthcare system is the target of much ire, this research shows it's time to question satisfaction as a metric – it isn't giving us the full picture.

Beyond satisfaction, when we ask people how they feel about their health it's a different story – one about frustration, anxiety and luck.



Anxious: When they lack agency or control, and when they feel like they can't figure out what to do or how to fix what's happening to them



Frustrated: When things aren't working the way they should (smoothly, and successfully)



Lucky: When something does turn out for the best (they're healthy, or their experiences with the system are going smoothly)

Make easy navigation of the system a given, not a lottery

When people attribute good health and healthcare experiences to luck, we know that satisfaction isn't the right metric – they think cosmic chance is their saving grace, not a functioning system or even their own effective behavior.

When we measure frustration and anxiety, we see that negativity is bred from a lack of helpful information and general confusions when navigating the healthcare system (especially, but not exclusively, when dealing with insurance companies, costs, and medications).

To make a difference for patients, brands should focus less on increasing satisfaction (an amorphous and therefore misguided goal), and focus more on reducing frustration and anxiety.

Reduce consumer anxiety by giving people control over their journey through information and tools that make the system easier to navigate (i.e. scheduling software that allows them to have more say in appointment planning, insurance resources that help them know what their plans mean, etc.). But, beware of information overload – more isn't always better.

1

Reduce people's frustration by anticipating and resolving problems that create hassle and undue burden when they're trying to get care (getting timely appointments, finding insurance plans that best fit their needs, etc.)

2

Reassure people that their behavior is contributing to what they see as "luck" to continue to reinforce and encourage greater engagement and healthier practices

3

METHODOLOGY

Benenson Strategy Group conducted 500 interviews online with engaged healthcare consumers from June 14-27, 2019.



Engaged healthcare consumers were screened to meet at least one of the following criteria...

Had engaged with the system in some way in the last 12 months – beyond their regular PCP appointment

Had a chronic condition
(anything from diabetes, to heart disease, to high blood pressure)

Took medication regularly



We explored consumer attitudes towards their healthcare systems and institutions, working to unearth their deepest pain points and most vital needs.

Their feelings and attitudes towards their own health status and journey

Their patterns of moving through the healthcare system, and both the success and friction they experience while navigating that system

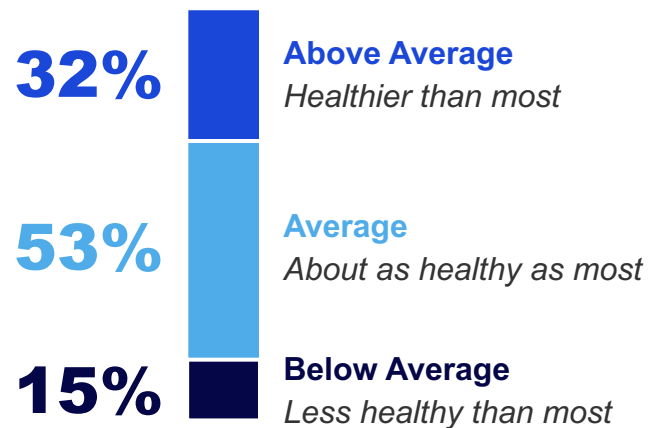
Unexpectedly high satisfaction inspires us to question the proper metrics to assess healthcare programs

Most people think they're in good health regardless of medical diagnoses they may be living with

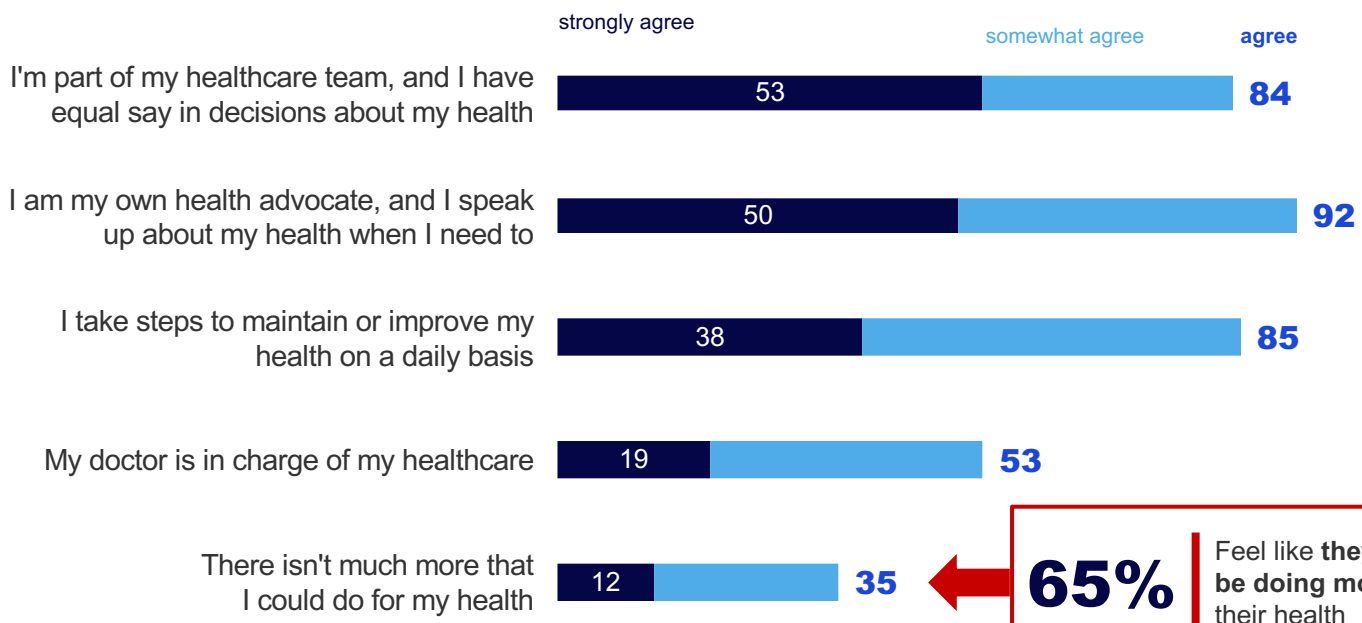
Among those with a **chronic condition**:

- ✓ **78%** rate their health as **average or better**
- ✓ And, only **22%** rate their health as **below average**

Ratings of Their Own Health



All feel like they have a role to play and are actively engaged with improving their health; But they recognize they could be doing more



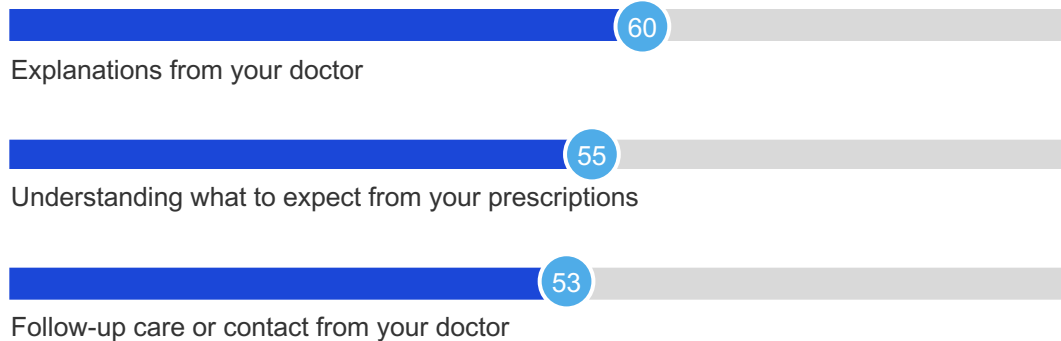
High satisfaction with individual experiences – even in areas we'd expect complaints

Doctors receive top marks across the board;
Insurance companies earn the lowest ratings

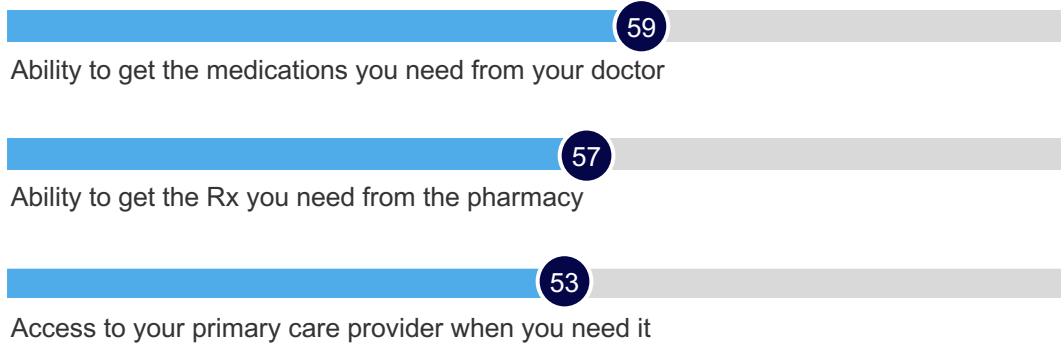
% Very Satisfied with HC Experiences



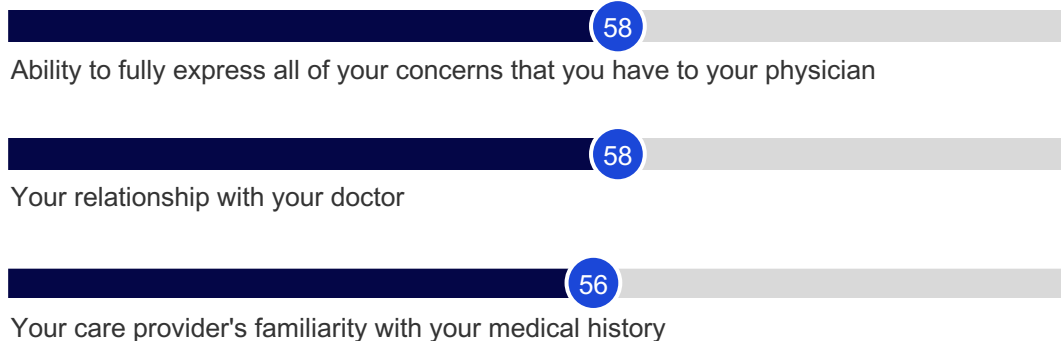
Information



Access

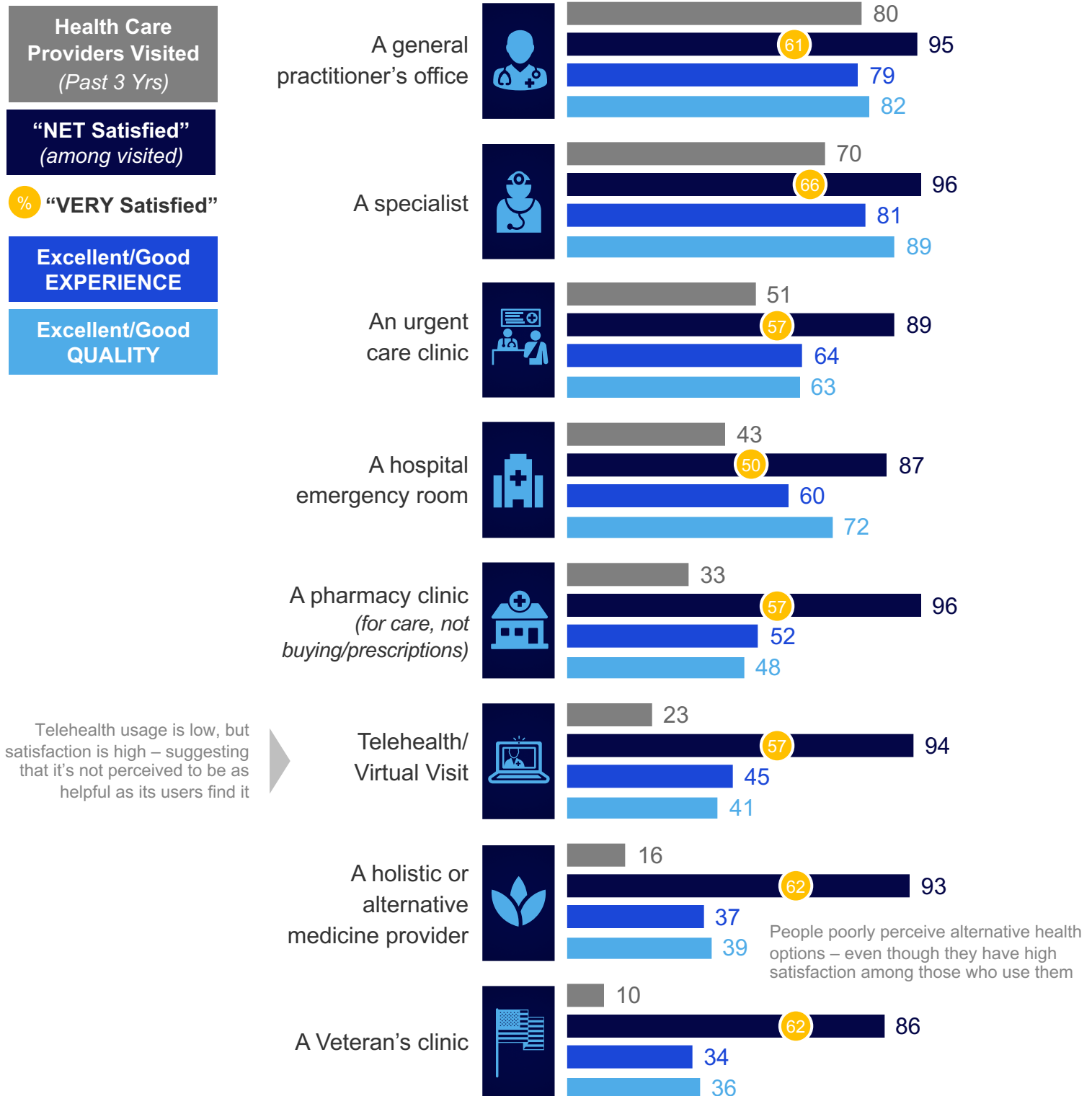


Relationship



Most patients recall extremely positive/satisfied experiences, particularly for traditional providers – GPs and Specialists

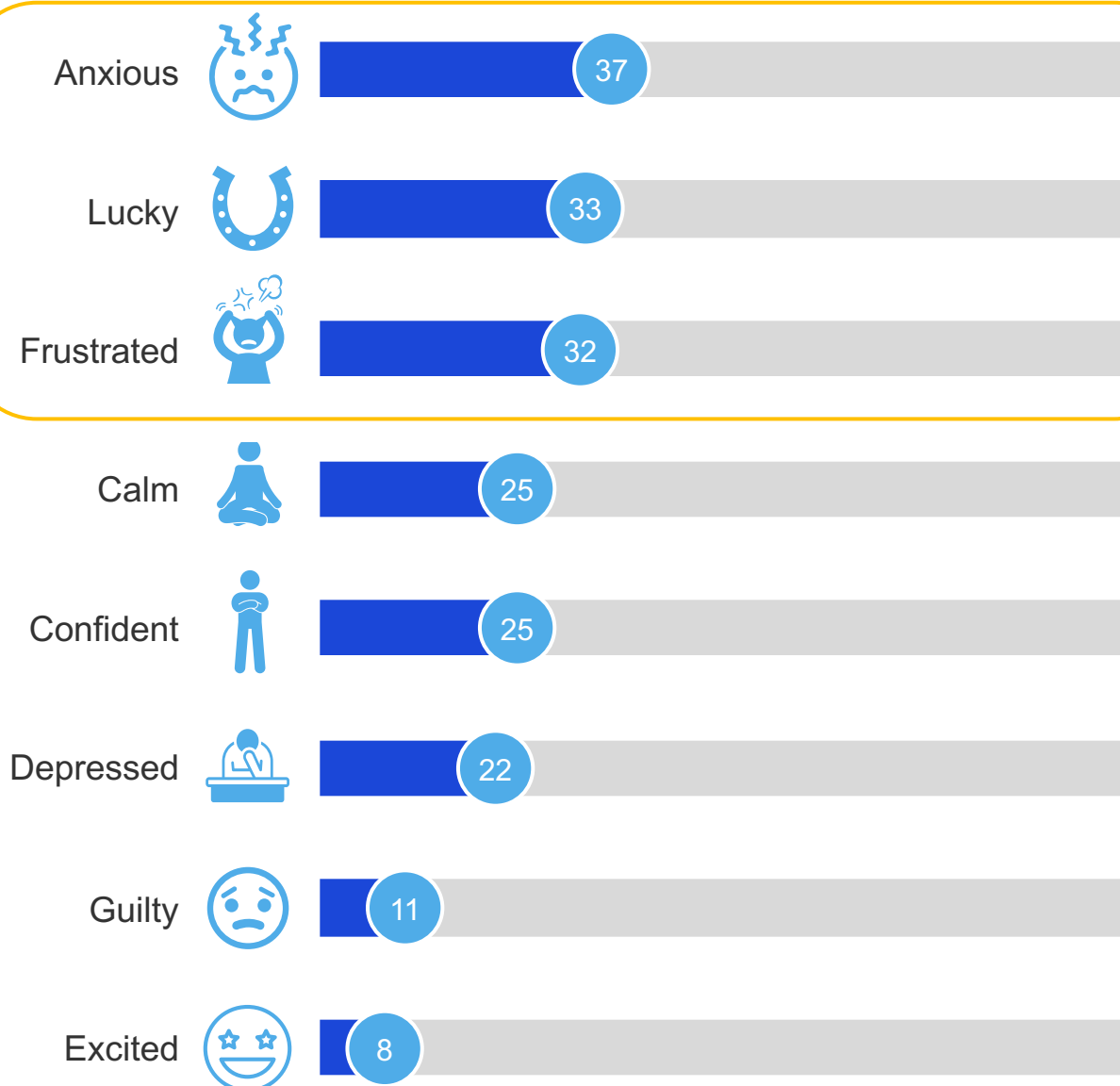
People using the services report high satisfaction, yet perceptions aren't aligning – pointing to a larger reputation problem



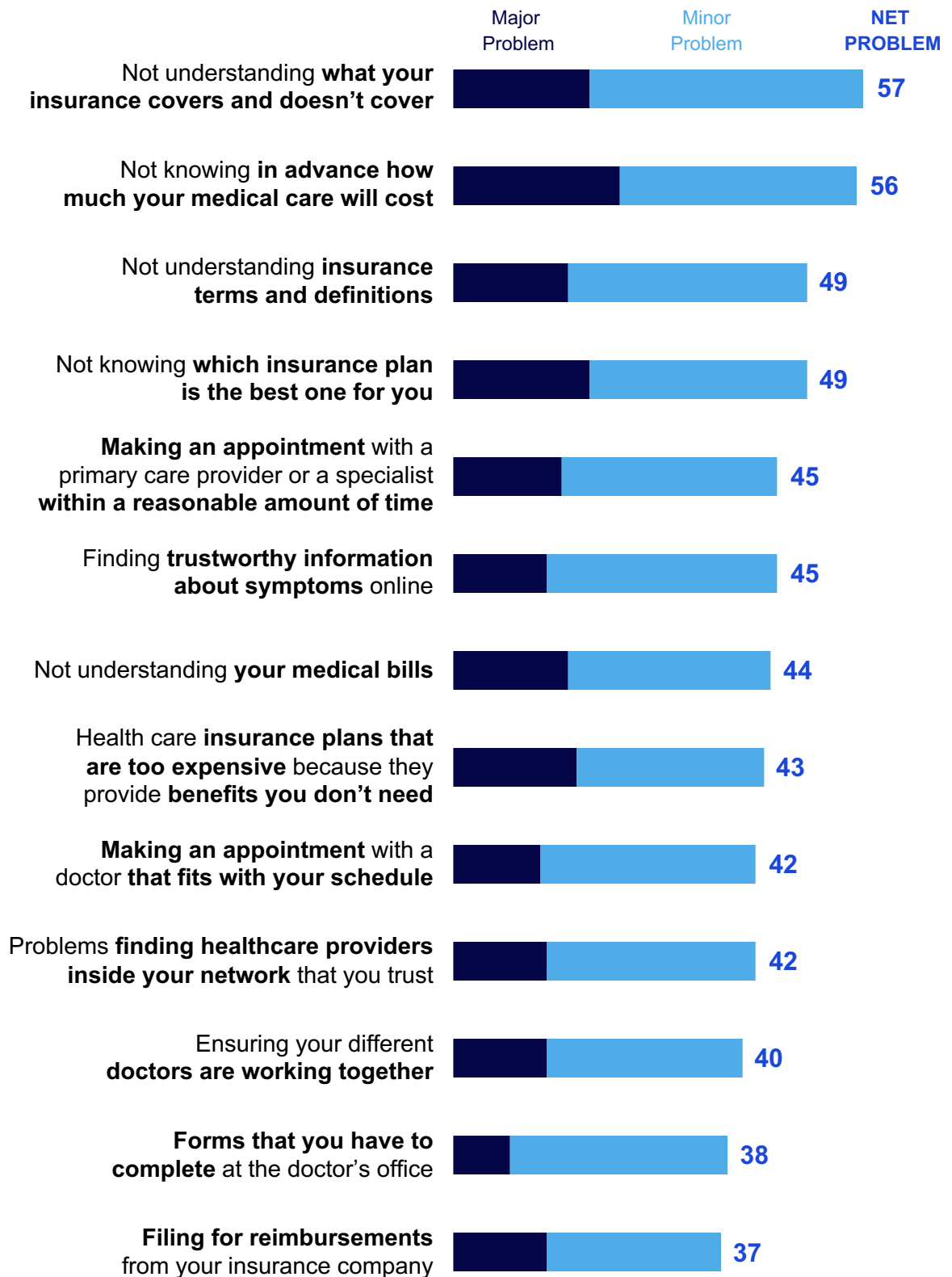
The satisfaction metric masks how people are really feeling

The top feelings about health are *anxiety*, *luck* and *frustration*, which suggests brands may be focused on the wrong things when developing patient programs

How does thinking about your health usually make you feel?
% Choose (Allowed to select up to 3 responses)



There are deep pain points, with operational issues such as coverage and scheduling (more than providers) at the root of their discontent



A multitude of minor issues add up to a complicated process to navigate

Frustrated and anxious people worry they aren't receiving quality care and feel they are less on top of their health



Anxious (37%)

People feel **anxious** when they **lack agency or control**, and can't figure out what to do or how to fix what's happening to them.

TOP PAIN POINTS

- Not understanding **insurance terms** or which **plan is best**
- Making **appointments that fit their schedule**
- **Less likely to** feel like they **have all the information they need** to make HC decisions
- **Insurance plans that aren't right for them**
- Ensuring their **different doctors are working together**
- Feel like **they're falling short** of their health goals and needs
- Not understanding what their **insurance covers**
- **Getting appointments** in a reasonable amount of time
- **Not feeling successful** at health and wellness goals



Frustrated (32%)

People feel **frustrated** when **things aren't working as they should**, or when **hard work doesn't yield the outcomes they expect**.

"Lucky" people seem to describe a different system – one where processes are more seamless and they feel gifted with good health



Lucky (32%)

People feel **lucky** when **things turn out for the best** (they're healthy, or their experiences with the system are going smoothly).

While they practice healthy lifestyles, they still attribute good outcomes to luck... And they fully believe that their luck can change.

They have the fewest needs and are getting the outcomes they hope for...

- Least likely to have chronic medical conditions
- They feel they're meeting their health goals, making progress, and are on top of their health

... as well as the most positive views of the healthcare system

- Much more **satisfied with their physicians**
- Less frustrated with **making appointments**
- Less upset with **ill fitting insurance plans**

As many as 1 in 3 prioritize convenience over both cost and quality of care

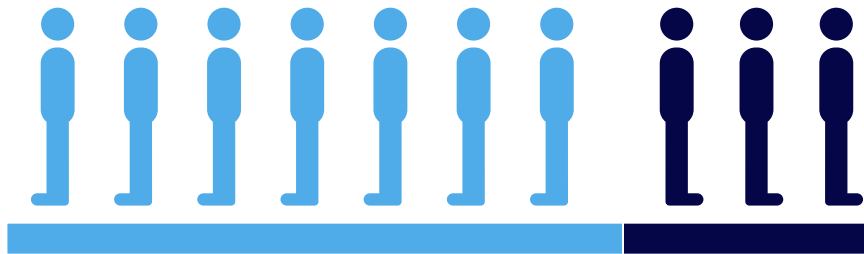
When it comes to decisions about HC providers, which is more important to you?

71%

chose

Quality

The expertise of the doctor I'm seeing



29%

chose

Convenience

Appointment wait time, location, and availability

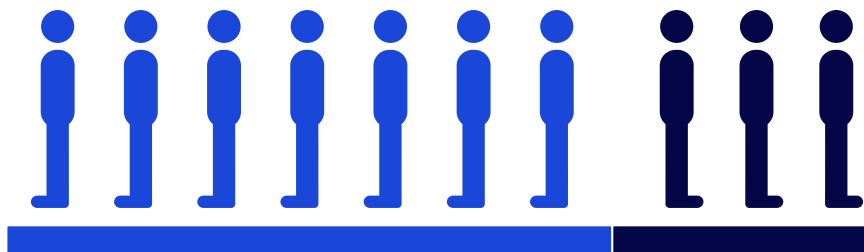
Outcomes win over experience, but about 1 in 3 would still trade in quality just to cut corners and make it easier

70%

chose

Cost

Whether or not my insurance is accepted



30%

chose

Convenience

Appointment wait time, location, and availability

The fact that this many would ignore cost for the sake of convenience points to how painful navigation can be

How brands can help

Fewer than half feel like they are making fully informed decisions about their health all the time

How often do you feel like you have the information to make good decisions about your healthcare?

43%

Always

51%

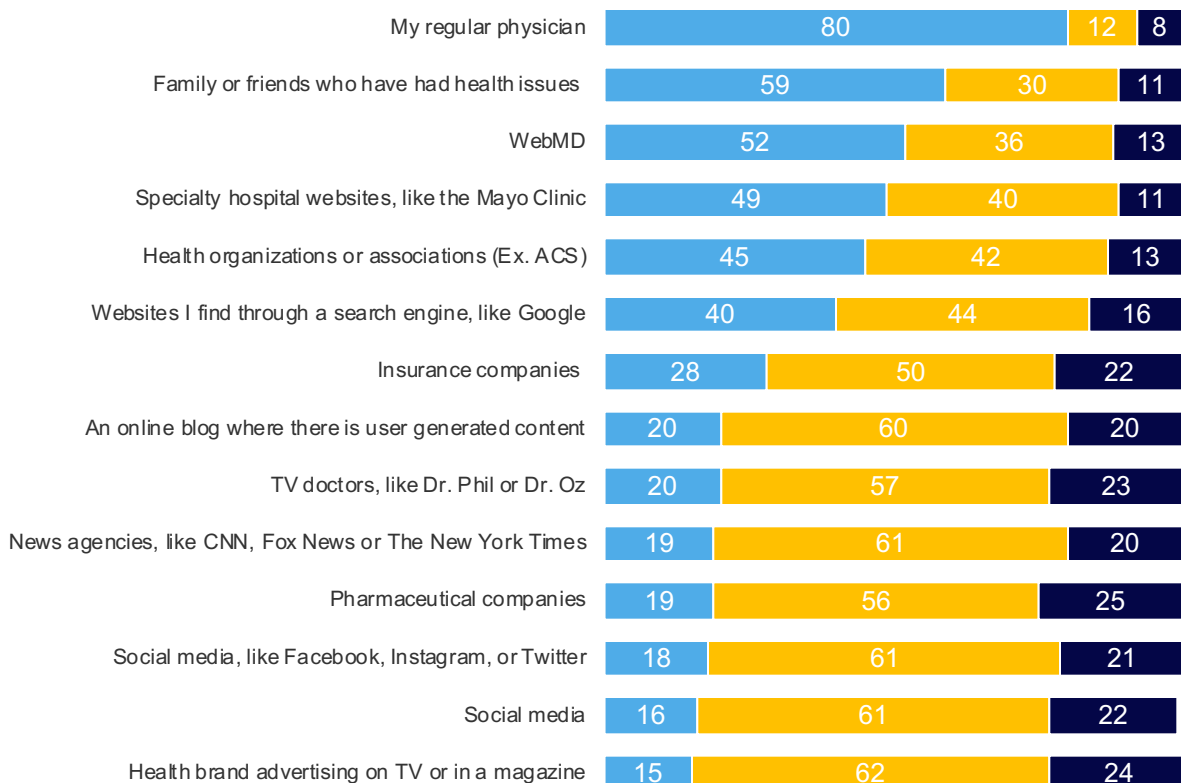
Sometimes

6%

Never

Does it make it easier/harder to make good decisions about your healthcare?

■ Easier (NET 4-5) ■ No Impact ■ Harder (NET 1-2)

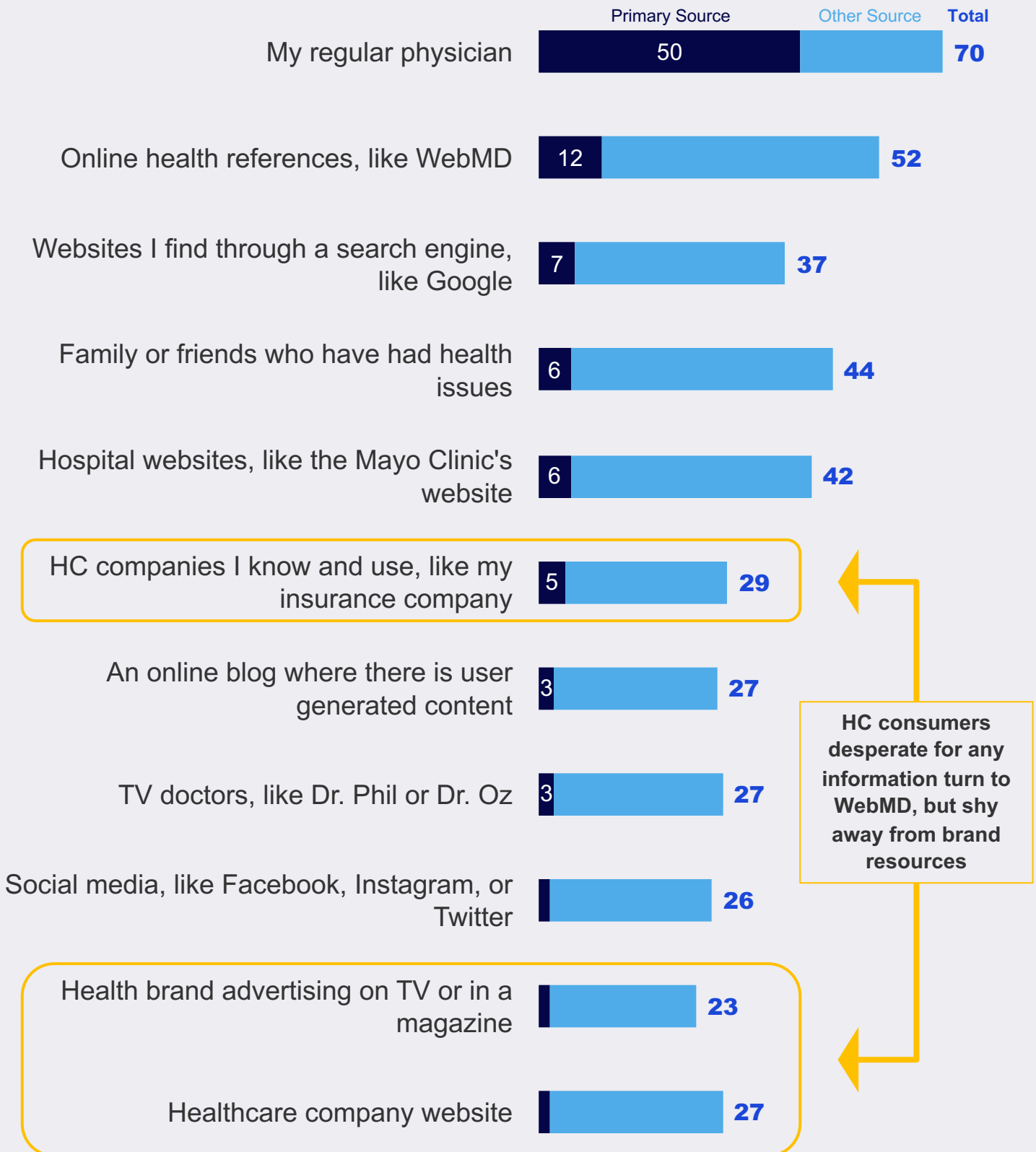


People report they get the most helpful information from their physicians and other people

Insurance and other healthcare companies are not providing a NET benefit when it comes to offering people information about their healthcare

Companies are spending time and money on resources consumers don't value, and often don't use

Health Information Sources



Patients want a more connected health experience that simplifies and reduces patient burden...

53%

Computer software that could keep your medical records and medical history so that when you go to different doctors, they would be able to easily access your medical records online

43%

Software that helps doctors use your medical history and current symptoms to best diagnosis your illness and course of action

41%

An easy way to get **reviews of doctors** who are covered by your insurance

41%

Online scheduling tools that let you make and change appointments using the internet

... they aren't looking for innovations that upend care delivery

34%

A service where **doctors can do house calls** and treat you in the comfort of your own home

33%

Mail-in prescription services that allow you to have your medications delivered to you

31%

A service that lets you **see your regular doctor**, or any doctor you're familiar with, **over video conferencing**



Implications for companies and brands: Address the real worries and take the “luck” out of quality healthcare



Reduce frustrations

by anticipating and addressing their friction points, the places where the system isn't working as it should

1



Relieve anxiety

by giving consumers agency over their journey through the HC system – better information (that they understand) and logistical tools (that help them make a plan for what's next)

2



Reinforce health success

a result of a working system and healthful behavior, and not as a lucky win

3



Innovate

in the areas that make processes simpler and far more convenient

4

