



# Improving the patient experience:

Insights for healthcare professionals from the KPMG US Customer Experience Excellence Report 2022

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# Putting patients first

Over the past several years, KPMG has fielded an annual survey evaluating customer experience excellence across key US sectors. We have asked people about their personal experiences with both consumer and public sector brands. In 2021 we added the healthcare sector into the mix, including both providers and payors. The results are enlightening.

We've seen growing attention paid to the customer experience over the past decade. Why? Not the least because consumers themselves have simply come to demand it. Increasingly, personalized, seamless interactions with brands are becoming a baseline expectation, whether consumers are shopping, traveling, dining or accessing healthcare services. And there is a significant upside for organizations. Excellence in customer experience and favorable brand interactions yield measurable advantages and large dividends — increased customer satisfaction and loyalty, accelerated growth, improved operational efficiencies and reduced costs. That's why leading organizations are investing heavily in improving the customer experience across the entire customer journey and why the healthcare sector should consider following suit.

While our study focuses on a broad range of sectors, the lessons for healthcare are no less instructive. Exceptional customer experiences can empower consumers to make informed decisions and handle matters on their own, boosting their sense of control and self-determination — critically important to health and healthcare outcomes. Such experiences can make transitioning from digital to direct human interactions coherent and seamless. They can create significant efficiencies in the face of tightening budgets, constrained workforces and increasing demands. Satisfied consumers, employees and partners fuel breakout brand performance.

What can the healthcare sector learn from the other sectors we studied? Plenty, as it turns out. Let's start with a look at overall sector performance and our survey methodology.



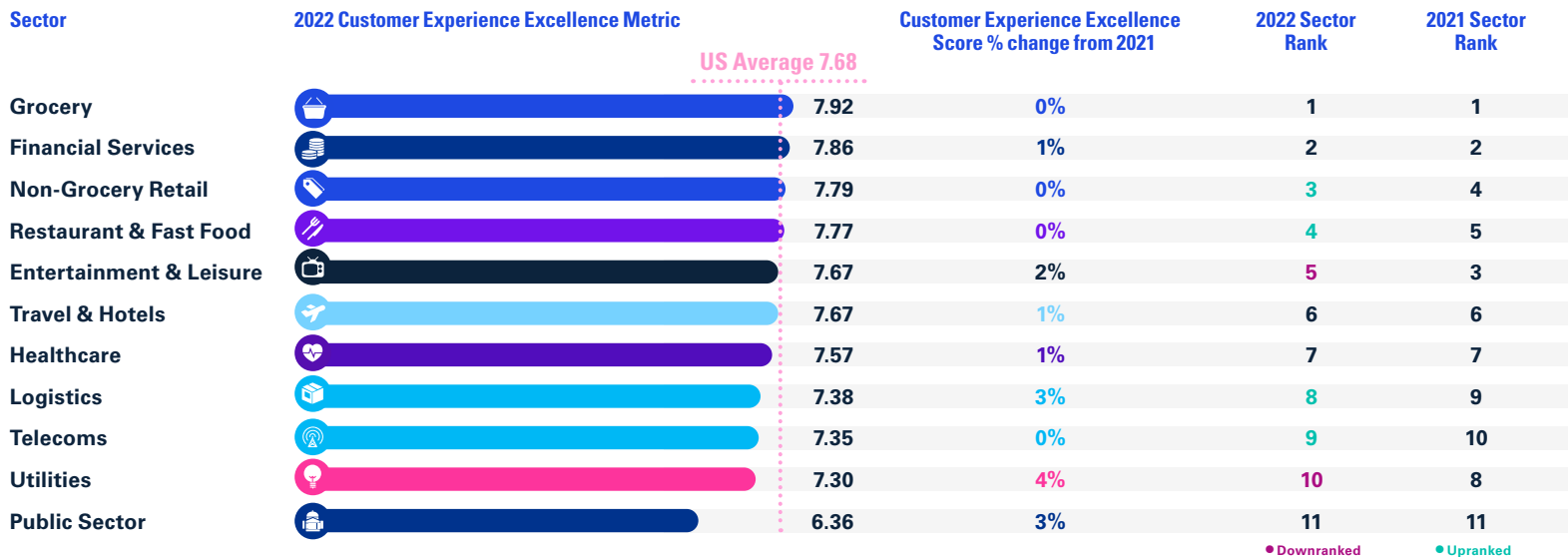
## US sector performance ranked

Our survey ranks individual organizations using a **Customer Experience Excellence (CEE)** score — a value from 0 to 10, 10 being excellent — with the total score for each organization as a weighted average across all survey questions. This year, 237 US organizations were included in the survey, across 11 sectors, with both commercial companies and public sector agencies among them. More than 7,700 US consumers were interviewed, with scores recorded for their perception of each organization’s reputation in three main areas:

- **Advocacy** — How likely they were to recommend the brand to a friend or colleague
- **Loyalty** — How likely they were to continue using the brand in the future
- **Six pillars** — Ratings for each pillar of the customer experience: empathy, personalization, time and effort, expectations, resolution and integrity.

How did the US sectors perform?

## U.S. Sector Performance



On average, US market performance was 7.68, without broad fluctuation sector by sector. Top 10 performers, however, came in at a notably higher average CEE score of 8.35. Breakout performers, hailing from non-grocery retail and financial services sectors, have seen dramatic improvements in their CEE scores since

2018. Merrill Lynch, the most improved brand, has enjoyed an over twelvefold shift upwards in ranking. These impressive upswings don’t happen by accident; they are the result of concerted focus and effort.

## How does the healthcare sector stack up?

In our 2022 report, we include analysis of 10 healthcare brands. Twice that number — a mix of 20 providers, payors and emerging hybrid “payviders” — had been included in the survey, but half of these brands did not receive an adequate number of responses to meet the report’s threshold for statistical validity. Those that did are largely payors or payviders. We believe this may be because payors/payviders are larger national brands while providers tend to be more local or regional, which limited the number of responses they received. As a result, it’s important to consider that the survey results and analysis of the “healthcare” sector will be skewed toward payors and payviders.

While there were no breakout performers among the 10 healthcare brands reviewed and none included in even the top 100 brands for customer experience excellence, the healthcare sector did maintain its 2021 performance, remaining seventh in sector rankings, with an average CEE score of 7.57 out of 10. Recommendation drivers, those attributes most associated with customer advocacy and referrals, for healthcare brands were quality of available services, range of available services and value (price/rate).

Despite holding on to the seventh position in ranking, included brands did see a 1 percent decrease year over year in average performance, and small decreases across the board in each of the six pillars of experience excellence. The time and effort pillar saw the largest year-over-year decrease,

coming in at 4 percent below the cross-sector average and at a 0.15 percent decrease from its 2021 standing, trending away from the desired ease of use and frictionless process that are fundamental to a positive customer experience. Undoubtedly, the COVID-19 pandemic played a role in this decrease. Healthcare providers have been battered by the demands of the pandemic, with fatigue and dissatisfaction rife. Pressures on staffing create yet more challenges to delivery of services and customer satisfaction.

Interestingly, personalization, with a 7.82 average score, was the highest-performing pillar — happily one that is a major differentiator for customer loyalty. Personalization was the only pillar in which healthcare outperformed US overall market average scores. It was followed closely by the integrity pillar, with a 7.6 average score.

## Pillar Performance in Healthcare



## Change, convergence and the coming squeeze

While the healthcare sector might be congratulated on maintaining its ranking from 2021 into 2022, there are signs on the horizon that continuing to do so may be more challenging. Changes in the marketplace are adding pressure on traditional healthcare brands.

The move, on the payor side, to value-based payment founded on health outcomes, for example, is driving a shift to health maintenance and wellness, and a corresponding shift in service offerings on the provider side. Similarly, the convergence of services offered by providers confers more consumer choice — hospitals embracing continuum of care services, and home and hospice services delivering more sophisticated care outside of the traditional healthcare

setting. An aging demographic accessing healthcare services through Medicare is changing the economics of healthcare delivery for payors and providers alike.

Technology, too, is having an effect. Portable digital health records up the ante on personalization and expectation. Providers are being pressured to embrace telehealth and virtual medicine, which minimize the impact of geography and maximize range and choice of services available to consumers. On the payor side, consumers expect seamless access to real-time status on coverage, meeting deductible thresholds and payment of claims. All this demands mobile, internet-friendly technologies and services.

The most impactful of these changes, however, may be the blurring of the traditional divide between payors and providers: the rise of “payviders” delivering vertically integrated services, with a seamless experience from delivery of care to management and

payment of claims. They have the ability to curate care by patient profile, orchestrate the total healthcare experience and keep service costs down while increasing margins.

Convergence isn't limited to traditional payors and providers joining forces. There are new entrants in the field — the addition of pharmacies, traditional retailers and technology companies into the mix is further blurring the lines of demarcation of the traditional healthcare market. Pharmacy players and major retailers have been acquiring physicians and clinical assets for direct delivery of care. Their decades of experience fine-tuning consumer-focused experiences will surely carry over into these new offerings. Acquisitions or alliances with technology companies open the potential for a seamless view of customer behavior. Consider the impact of the integration of data from care through claim, and in some cases, from retail consumer behavior through the entire healthcare experience.

No matter the healthcare business model, the ability to provide a frictionless experience to the customer from access to services, receipt of good care and payment for services — all without pain — is increasingly essential. To build brand preference and grow share of patients, players in the healthcare sector will need to focus on customer experience excellence. That is how they will hold their own in such an increasingly competitive environment.



## From patient to customer

Historically, the provider side of the healthcare sector has paid attention to patient outcomes and quality of care, while the customer experience took a back seat. Even the notion of patient as customer was a foreign concept. On the payor side, the large employers or groups were seen as the primary customer, and the patient or “member” was largely ignored — indeed, the less contact with the member the better. The focus was on growing membership rather than on the end-to-end patient experience.

Today providers, payors and payviders alike are coming to the realization that they need more control over the entire process, focusing more attention on orchestration of the patient experience to enhance relationships and control costs. They understand that attention to the patient — getting that individual to the right service expeditiously to achieve better outcomes — will lower their costs and improve the bottom line. All this signals a shift in healthcare sector perspectives to a view of the patient as customer and heightens the importance of the patient’s customer experience.

Getting it right will require building an infrastructure in support of the patient experience. It will encompass a fundamental re-envisioning of process, systems and delivery of services with the customer experience at the center. It will demand a shift in focus from the transactional to lifetime customer relationships founded upon a solid understanding of the needs and expectations of patients, providers, payors and payviders. Meeting and even exceeding these expectations is the goal. Lessons from the brands and experiences featured in this report can provide direction.



## What can you learn from customer experience leaders?

The companies covered in this report can offer valuable insights for any organization regardless of sector. Several of the top 10 brands are particularly relevant to healthcare.

Consider USAA: As in the case of illness motivating interactions with healthcare, the interactions between USAA and its customers are often instigated by something negative — an accident requiring a claim, for example. How does USAA turn that claims interaction into a positive brand-building experience? How does it communicate compassion and human caring in a digital environment? Self-service, accessibility, swift process, relentless innovation and a premium on problem-solving are key ingredients in its alchemy.

What can Chick-fil-A teach a healthcare provider? How about using technology to move customers through both a process and physical facilities quickly and easily? How does Navy Federal Credit Union cocreate with customers, utilizing feedback and journey mapping to humanize the technology experience and integrate digital and in-person experiences in a seamless omnichannel environment? How does L.L.Bean future-proof its technology to anticipate and flexibly adapt to emerging market conditions, disruptors and new entrants? These diverse companies, seemingly all so far afield from healthcare, can all provide valuable information and insights.

## Lessons from breakout companies

Our report also looks at six breakout performers — organizations that made a dramatic improvement in their CEE score year over year. Most were ranked in the hundreds last year, this year leaping into the top 25. How did they do it? What can you learn from their efforts?

The report examines the eight capabilities or factors these companies all share that propelled them from mediocrity to excellence — insight-driven strategies and actions, innovative products and services, experience-centricity by design, seamless interactions and commerce, responsive operations and supply chain, aligned and empowered workforce, digitally enabled technology architecture and integrated partner and alliance ecosystem. How does your organization perform against these capabilities?

Consider, for example, insight-driven strategies and actions. How well do you understand the journey your customers experience as they access healthcare services or monitor their coverage? Is your site welcoming and easy to navigate? Is setting an appointment online, by phone or in person simple? What about communication with practitioners? Is it easy to get questions answered? Are appointments available? Once an appointment is secured, what is the patient experience in a telehealth setting or the physical in-clinic experience like? Are wait times long and tedious? Are consults satisfying? What about after a visit? Are aftercare communications timely and accessible? Are claims for services handled seamlessly? The first steps to improvement are capturing insights and devising a structured, prioritized plan to address changes where needed. What is your organization doing to better understand the entirety of the customer journey and to stay current with evolving customer needs and preferences?

Or think about an aligned and empowered workforce, especially in a postpandemic world. A great customer experience starts with a great employee experience. What can you do to make practitioners' jobs more enjoyable? How can the use of technology enrich their experience, rather than create perceived bureaucratic burden and "distance" from patients?

How do you get started on improving the customer experience of your stakeholders? A good place to begin is to evaluate your organization's capabilities against the eight factors so transformative for our breakout performers. Then think about prioritizing your efforts to address gaps, tackling change and improvements with a well-defined roadmap leading to measurable outcomes. Transformation can be incremental. Certainly that makes it more manageable. Focusing on improving even one capability can often make a meaningful difference. Your goal is to find the sweet spot where investments in customer experience enhancement, delivery of experiences that meet or exceed customer expectations and the return of economic value to your organization are in balance. Our report is intended to stimulate your thinking, illuminate direction and provide encouragement. Others have achieved customer experience excellence and breakout performance. With a focused effort accommodating the needs of your organization, you can too.

We hope you enjoy the report.

**Download the KPMG US Customer Experience Excellence Report 2022: [visit.kpmg.us/2022\\_US\\_CEE](https://www.kpmg.us/2022_US_CEE)**



# How KPMG can help

Staying ahead of changes in patient-care delivery channels and responding effectively to consumer expectation and demand are becoming increasingly important. The KPMG Healthcare Strategy practice brings diversified experience serving clients across multiple facets of the healthcare stakeholder spectrum. With our integrated approach to delivering value, depth of knowledge in the healthcare industry and data-supported and tools-led insights, our teams deliver rapid results and measurable advantage. We help healthcare organizations undertake swift analyses of their current situation, identifying opportunities and developing road maps to help them compete effectively and further their growth strategies.

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