



**What is the cure
for a better patient
experience in
the GCC?**

■ ■ ■
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There has been a paradigm shift in what consumers are expecting from health care services.

Today, consumers are no longer satisfied with health care providers just meeting their basic physical requirements. Today, they expect them to go beyond this and also meet their emotional needs.

In the past, the main role of health care service providers was to correctly diagnose and treat patients. Today, patients are expecting them to understand and meet the end-to-end needs across their entire journey, as well as deliver experiences that patients have now grown accustomed to through their interactions with other service providers such as banks, telecom operators, airlines, hotels and more.

To become truly patient-centric, a health care system needs to recenter to its core purpose of “enabling citizens to live healthy lives.” This means putting citizens at the center of thinking and decision-making, shifting from “inside out” to “outside in” thinking, and engaging and involving citizens to define their expectations, standards and measures while getting them to rate their experiences.

In this paper, we explore what health care ecosystem stakeholders should be doing to meet citizen expectations and deliver a better patient experience.



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Overview

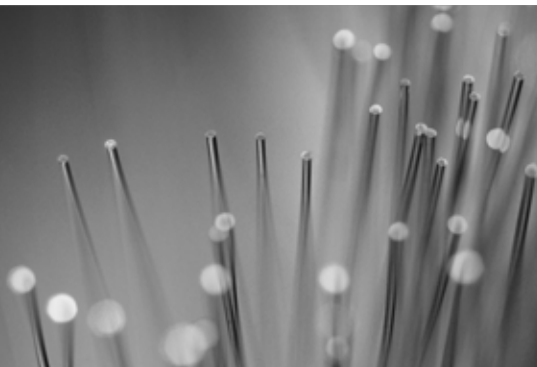
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Patient experience today

19

What can be done to improve patient experience in the GCC region?





While the health care ecosystem is focusing on preventing and managing chronic diseases, patient experience is becoming a focus for health care organizations.

Health care professionals in GCC have highlighted the absence of patient-centric culture within health care organizations. Furthermore, the importance of family and friends and their participation in care have received comparatively little attention; and the value of communication, information and education is less prominent in the patient experience value chain. These ultimately affect clinical outcomes and patient satisfaction scores.

Some health care service providers have developed patient experience strategies and branded themselves as providers of excellent patient experience. A majority of health care professionals in the GCC region say that patient experience is a strategic priority. However, governments and health care organizations are doing little to improve.

From regulatory bodies to providers, many health care organizations in the GCC region lack a mature patient experience management function, which acts as a bridge between the stakeholders within the health care ecosystem, helping them achieve the vision and strategic objectives related to patient experience.

Inconsistent quality of care has been a uniform challenge across the GCC region. In many geographies, public reporting methods for quality, patient satisfaction information and leading

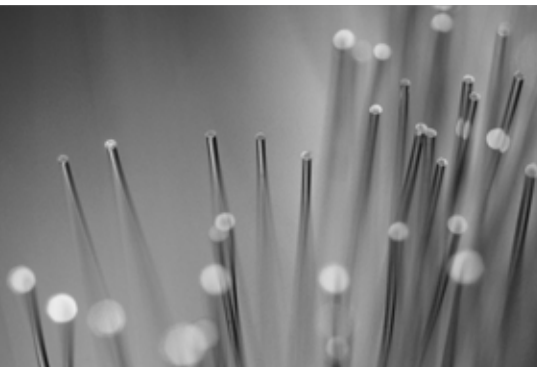
practices are not standardized; creating a gray area for regulatory authorities to redesign the health delivery system. Many GCC countries are launching key initiatives aimed at improving patient experience, but most of these initiatives are related to adhering to international accreditation standards and processes to improve patient safety and quality. Despite these initiatives, quality of care remains inconsistent in the region, and the authorities are not taking a holistic approach on patient experience.

With patients paying premium prices for exceptional health care services in the private sector, excellent medical care is now a mandate rather than an achievement. Establishing a patient experience management function will help improve accessibility to patients, quality of service, consistency and affinity. It will help patients appreciate the value of what they are paying for, improving loyalty and medical outcomes.

With the digital revolution, patients are becoming more aware, expectations are rising and demand to be involved in every step of the treatment is increasing. As a result, health care providers have increasingly recognized the importance of going beyond providing exemplary medical care to engage with patients.

Patient experience today





The rise of consumerism, pressure on digital convenience, growing access of patients to their own data, and pressure on affordability of care and clinical transparency, mean that patient experience and engagement will become an integral component of quality of care and can help improve health care outcomes across the ecosystem.

How will patient experience improve clinical outcome?

Patient experience correlates with improved clinical quality processes and outcomes

- ▶ Patient satisfaction surveys have managed to identify quality process improvements for health care providers and delivery systems.
- ▶ Patient-centric care has been correlated with positive quality outcome measures and improved clinical processes.
- ▶ Patient engagement in decision-making, disease management and health promotion are important measures for better quality outcomes.

Patient experience correlates with key financial indicators

- ▶ Patient experience has been realized as an element of compensation structures and payment. For instance, in the US, patient experience scores determine one-third of 1% of reimbursements to health care professionals.
- ▶ Putting the patient at the heart of an organization's strategy can lead to better overall profitability for providers, better clinical outcomes, higher patient retention and fewer readmissions.

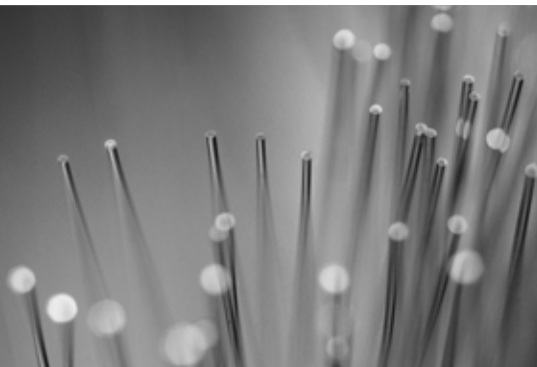
Patient experience correlates with lower medical malpractice risk

- ▶ Physicians could be at high risk when patient experience and engagement are uneven or miscommunicated, leading to negative outcomes.
- ▶ Situations of extreme patient dissatisfaction can result to litigations and malpractice risks.
- ▶ The patient-physician relationship is a major element of patient loyalty.
- ▶ The ideal patient-physician relationship enhances trust and encourages continuity of care, resulting in better patient health and well-being.

Patient-centric approach leads to a paradigm change in health system

- ▶ Empowering patients through self-care-oriented technologies and connecting them with clinicians will enable patient engagement in the value chain.
- ▶ Patient-focused pathways can help alter patient behavior, which is the root cause in eliminating the barriers to a successful patient experience.
- ▶ Implementing a multi-stakeholder approach by including public-private partnerships for population health will be a success factor in the patient value chain.

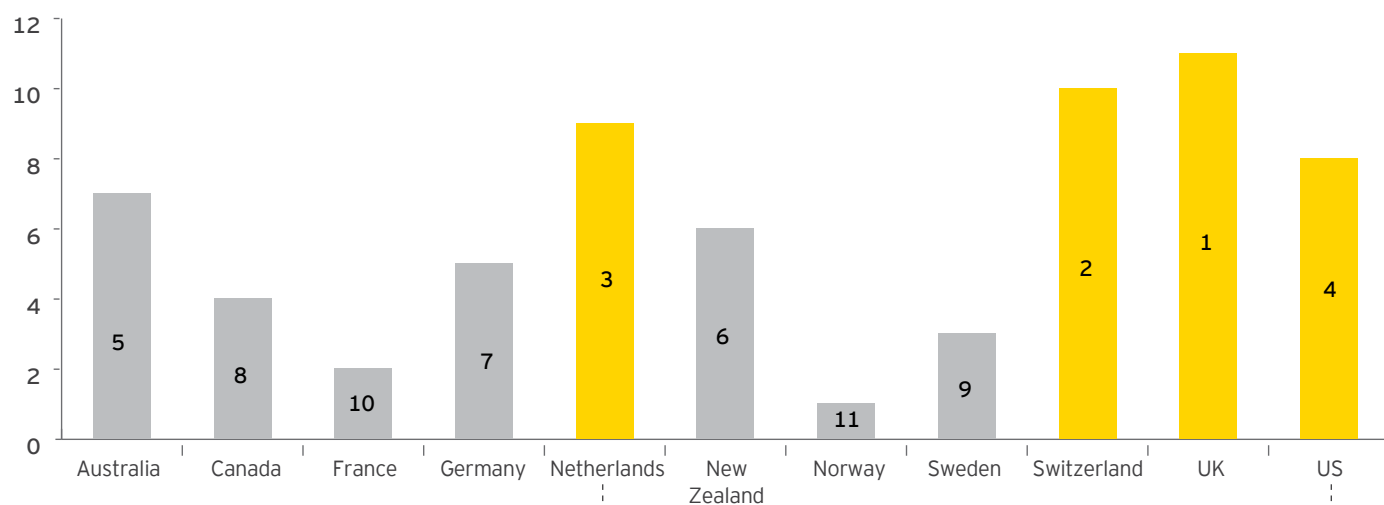
Source: EY analysis



Globally, some public and private health care providers have recognized the impact of measuring patient experience as an indicator for quality of care and have started using patient experience scores to evaluate and improve their health care systems.

The UK, Switzerland, the Netherlands and the US have health systems that rank highest in patient-centered care

Patient centered care index country rankings



The Netherlands uses patient experience surveys to enhance synergies and integration among all elements of patient care ecosystem, specifically:

Netherlands

- ▶ Consumer information on websites
- ▶ Advocacy by patient/consumer groups
- ▶ Strategic contracting by health insurers
- ▶ Priority setting by Health Care Inspectorate
- ▶ Public accountability of providers
- ▶ Monitoring of quality of care at national level

The US has integrated patient satisfaction scores into its health system's functioning

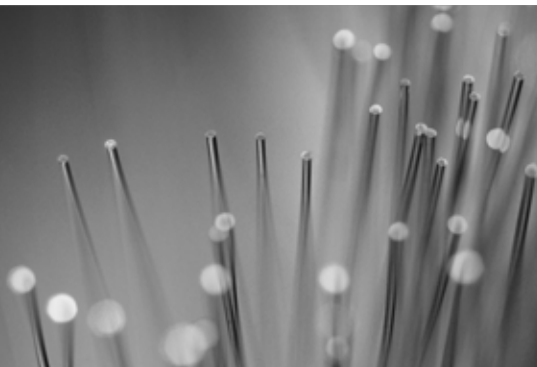
US

- ▶ A majority of senior health care executives have compensation tied to patient satisfaction scores – Hospital Consumer Assessment of Healthcare Providers and Systems (HCAHPS).
- ▶ Hospital reimbursement is directly affected by inpatient satisfaction ratings as part of the Centers for Medicare and Medicaid Services (CMS) value-based purchasing program and private payer initiatives.

- ▶ In 2014, the Commonwealth Fund published overall health system rankings based on several validated sources.
- ▶ Countries were ranked on various parameters including quality of care and patient-centered care.
- ▶ The UK was ranked first and the Netherlands third in patient-centered care.
- ▶ The UK was ranked first and the Netherlands fifth in overall health system.

Health systems focusing on patient-centered care are rated higher

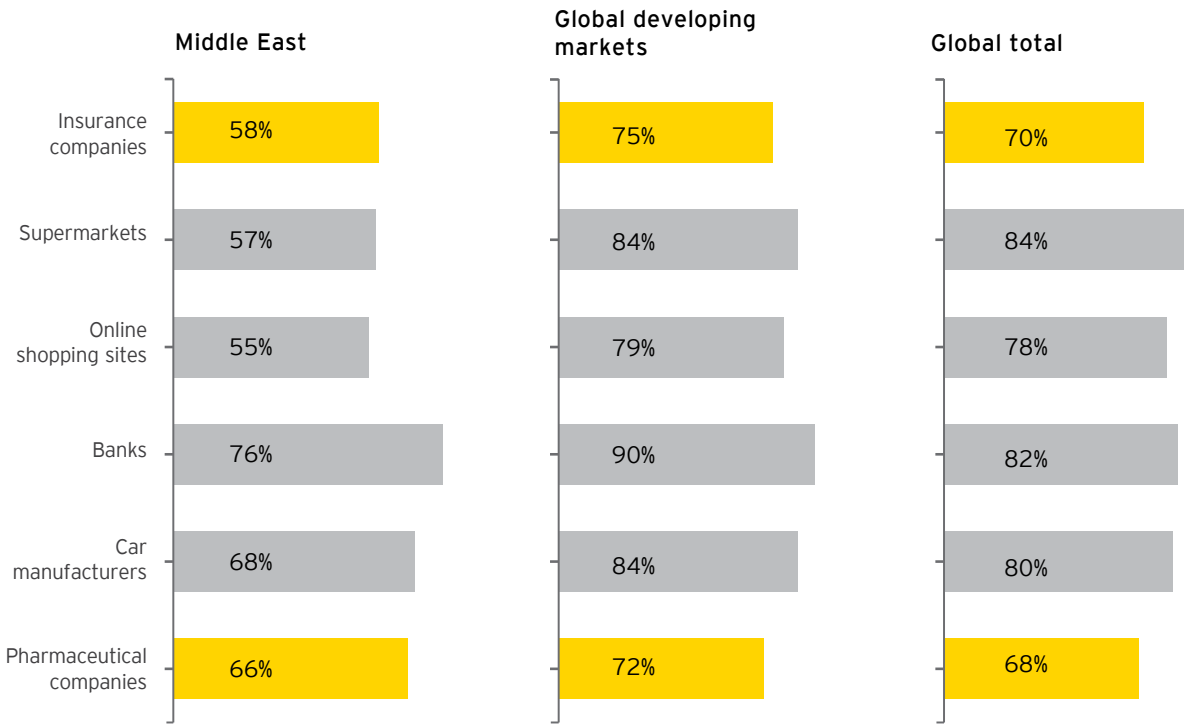
Sources: Calculated by the Commonwealth Fund based on 2011 International Health Policy of Sicker Adults; 2012 International Health Policy Survey of Primary Care Physicians; 2013 International health Policy Survey; Commonwealth Fund national Scorecard 2011; WHO; and OECD Health Data, 2013 (Paris: OECD, Nov, 2013). Comparative data does not exist for non-OECD countries.






Furthermore, within the private sector, insurance and pharmaceutical companies are among the least trusted health care stakeholders in the MENA region, and they have invested in digital platforms to improve this perception.

Level of consumer trust by business type

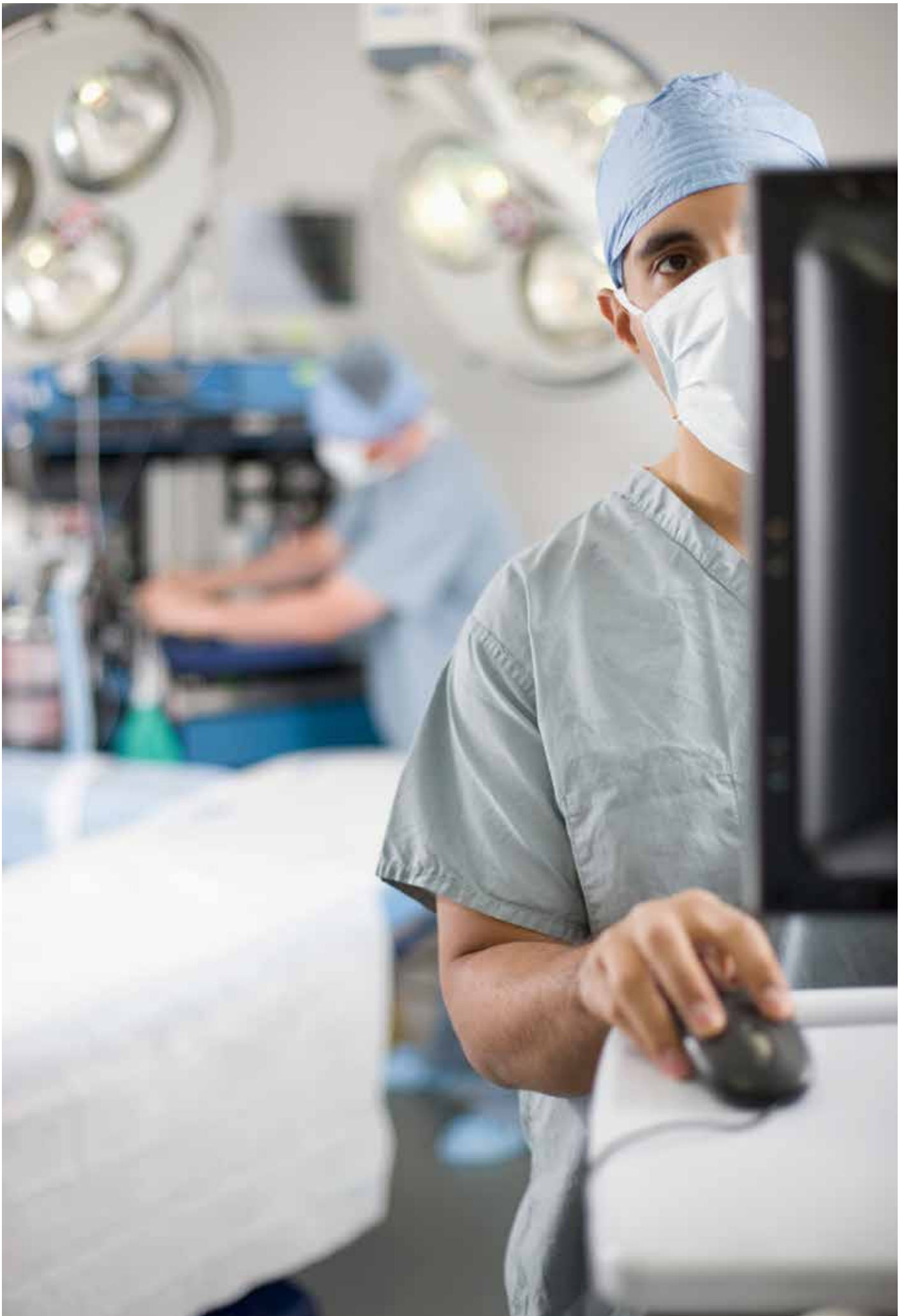
Consumer trust is defined as the attainment of loyalty to a particular product or brand

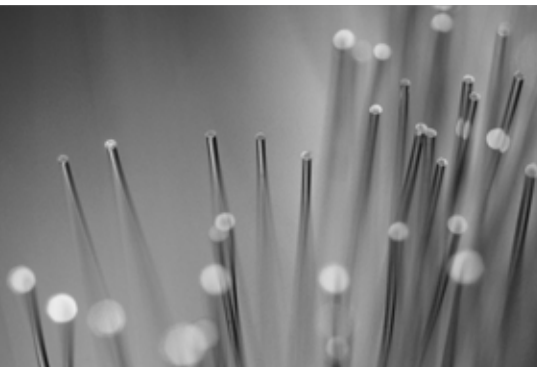


Organizations are investing in digital platforms to improve the trust of their customers

ADNIC Medical Insurance app 	<p>User-friendly solution that helps clients manage and track medical insurance claims while on the go, including:</p> <ul style="list-style-type: none"> ▶ Locate networks of medical service providers ▶ Submit reimbursement claims for up to AED2,500 ▶ Upload and view claim documents ▶ View claims with status and treatment history ▶ Generate medical insurance travel certificates ▶ Access other services
Online marketplace for selling insurance products 	<p>Opportunity to buy online various insurance products, including special program covering life-threatening illnesses</p>
Takaful Oman mobile app 	<p>A smart mobile app that provides access to:</p> <ul style="list-style-type: none"> ▶ Information about nearest hospitals ▶ Contacts ▶ Booking appointments

Sources: EY Global Consumer Insurance Survey 2014, EMEA; GCC Insurance Industry Report, 13 October 2015, Alpen Capital; EY analysis

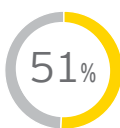




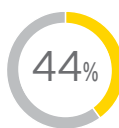
To get a balanced perspective, we further delved into the view of professionals within the industry, which revealed that, although patient experience is a priority in most organizations, there is still more to be done.

We spoke to 72 professionals in the healthcare industry and this is what they said

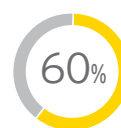
Challenges



rated overall health care quality as inconsistent



say organization culture is the main challenge limiting organizations from improving patient experience (PEX)



require support in developing patient experience management capabilities within their organization

Listening



have tried to actively listen to better understand patient experience

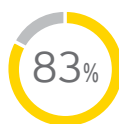


say greater patient awareness and expectations are driving their organization's patient experience agenda

Priority

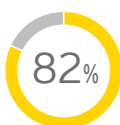


say that patient experience is a priority in their country



say that patient experience is a priority in their organization

Action



conduct patient surveys



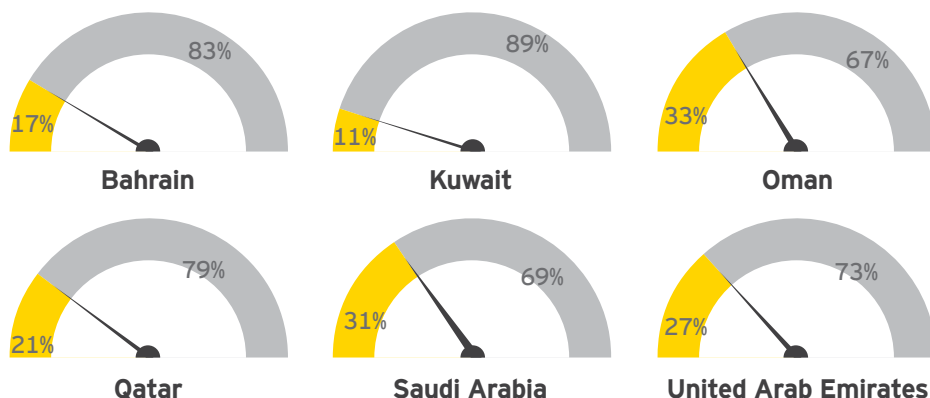
have internal KPIs aligned to patient experience

... on satisfaction

We asked 425 people across the GCC about patient experience in their country, and this is what they said ...

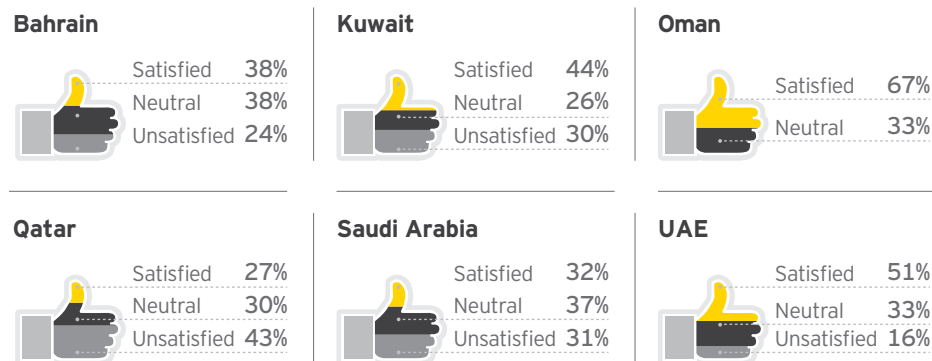
Do you believe enough is done to improve patient experience

Only **15%** believe enough is being done on patient experience



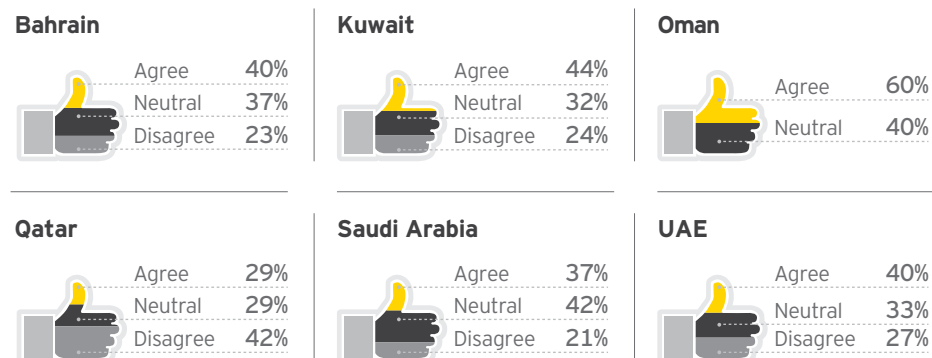
Are you satisfied with the health care system?

Only **40%** are satisfied with the health care system



Do you agree that you have trust in the health care system of the country in which you live?

Only **38%** have trust in the health care system



... on quality

We asked 425 people across the GCC about patient experience in their country, and this is what they said ...

Do you agree that health care professionals are qualified?

Only **56%** believe health care professionals are qualified

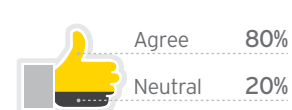
Bahrain



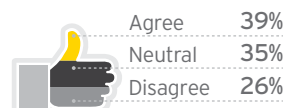
Kuwait



Oman



Qatar



Saudi Arabia

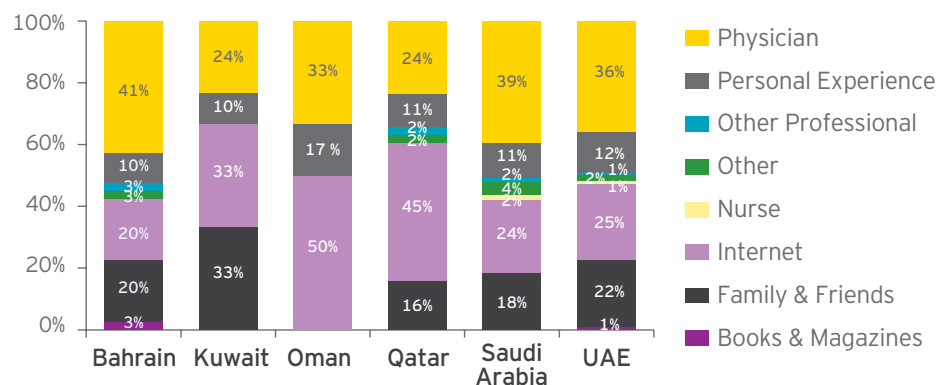


UAE



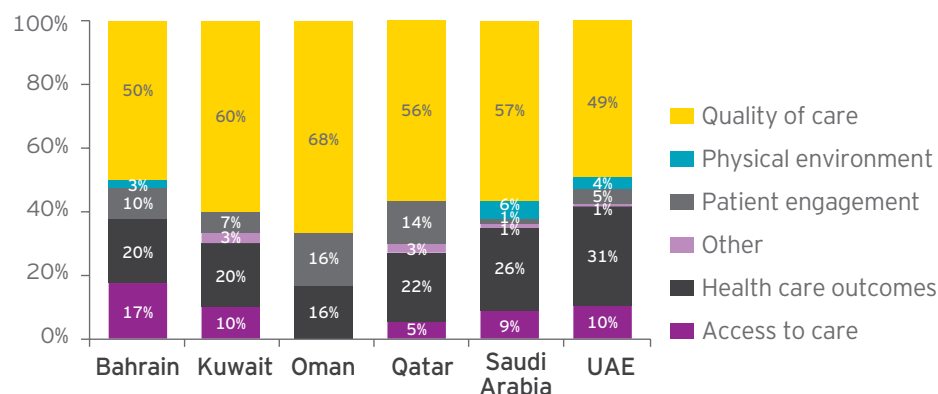
What is your main source for health care information?

Only **34%** rely on their physician for health care information above any other source



What is the most important aspect of health care?

52% believe that quality of care is the most important aspect of health care



... on engagement

We asked 425 people across the GCC about patient experience in their country, and this is what they said ...

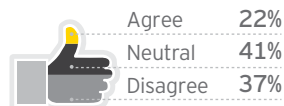
Do you agree that when you see your doctor, your time is not being wasted?

44% believe that their time is being wasted

Bahrain



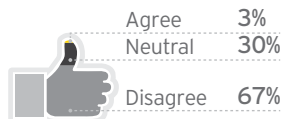
Kuwait



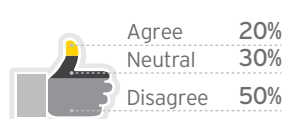
Oman



Qatar



Saudi Arabia



UAE



Do you believe that your doctor knows what's best for you?

25% believe that their doctor does not know what is best for them

Bahrain



Kuwait



Oman



Qatar



Saudi Arabia



UAE



... health empowerment

We asked 425 people across the GCC about patient experience in their country, and this is what they said ...

Do you agree that you want to be more involved in making health decisions?

69% want to be involved in medical decisions

Bahrain



Kuwait



Oman



Qatar



Saudi Arabia



UAE



Do you agree that you are being informed about your health?

40% believe they are being informed about their health

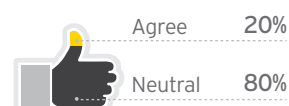
Bahrain



Kuwait



Oman



Qatar



Saudi Arabia



UAE



... on digital

We asked 425 people across the GCC about patient experience in their country, and this is what they said ...

Do you believe that digital and mobile health care is the future?

69% agree that digital and mobile health care is the future

Bahrain



Agree 69%
Neutral 15%
Disagree 16%

Kuwait



Agree 55%
Neutral 36%
Disagree 9%

Oman



Agree 60%
Neutral 40%

Qatar



Agree 80%
Neutral 17%
Disagree 3%

Saudi Arabia



Agree 72%
Neutral 22%
Disagree 6%

UAE



Agree 77%
Neutral 20%
Disagree 3%

Do you agree that you are eager to try new health care technologies?

78% are eager to use new health care technologies

Bahrain



Agree 84%
Neutral 6%
Disagree 10%

Kuwait



Agree 77%
Neutral 23%

Oman



Agree 100%

Qatar



Agree 90%
Neutral 10%

Saudi Arabia



Agree 77%
Neutral 22%
Disagree 1%

UAE



Agree 78%
Neutral 16%
Disagree 6%

Do you agree that there should be greater investment in health care technology?

83% believe there should be greater investment in health care technology

Bahrain



Agree 91%
Neutral 3%
Disagree 6%

Kuwait



Agree 77%
Neutral 23%

Oman



Agree 80%
Neutral 20%

Qatar



Agree 90%
Neutral 10%

Saudi Arabia

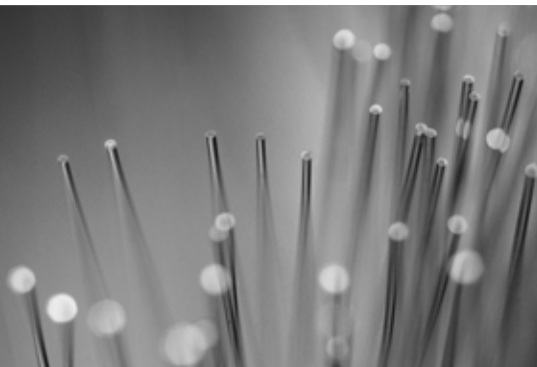


Agree 82%
Neutral 17%
Disagree 1%

UAE



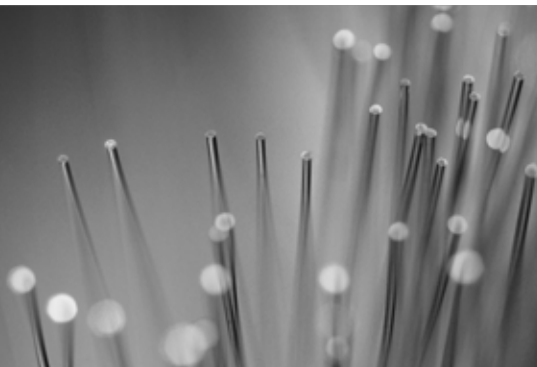
Agree 87%
Neutral 11%
Disagree 2%



Our findings have revealed patients have a number of self-reported issues that are common across the GCC region ...

What patients told us

1	They have a low perception of the quality of care Only 38% responded they have trust in the overall health care system. Most patients reported they would opt to get care for serious conditions outside the GCC region, in their homes countries, or in the west.
2	They do not trust health care professionals Only 25% believed their doctors knew what was best for them, and more than 25% considered the internet to be their main source for reliable health information over physicians. Qualitative interviews revealed that unsatisfied patients questioned health professionals' experience and qualifications, noting that a doctor's past experience is the greatest perceived indicator of his capability.
3	They have limited engagement and communication issues with front-line staff Findings revealed that patients have limited engagement with clinical staff, with a large number stating that they do not feel like they are being listened to. Communication challenges were also linked to inconsistent diagnosis.
4	They are frustrated when clinical staff have no prior knowledge of their medical history In one-on-one interviews, patients often brought up the lack of a consistent medical history as a point of frustration, linked to slow resolution time and inconsistent diagnosis.
5	They don't like to wait Patients often complained about long wait times and poor admin procedures, particularly during emergency room visits, when time is most critical. Waiting time had a strong impact on perceived quality of care and experience.
6	They are not feeling empowered to make health decisions Sixty-nine percent of respondents said that they wanted to be more involved in medical decisions, and only 40% believed that they were being adequately informed about their health.
7	They have limited visibility on how to get access to appropriate care Respondents voiced frustrations on finding up-to-date and consistent information on access to care, choice of clinicians and their availability, leading them to make uninformed decisions when selecting a provider and creating some suspicion in the appropriateness of received care.



... and our analysis, supported by industry interviews, suggests these are linked to challenges across the value chain.

Industry-wide challenges

Inconsistent patient case handling

Patient care agents are not fully informed on health care provider services, leading to hand-offs, unanswered patient queries and inconsistencies in care plans and follow-up care. As a result, low first-time resolution rates and longer case closure times are apparent, especially for rarer conditions.

Transient and high-turnover workforce

In the GCC region, health care professionals come from a multitude of countries with disparate standards of care and cultural norms. Despite standardized board examinations, cultural factors come into play, especially with bedside manner. In addition, turnover in staff is high, especially for the highly specialized, as demand for tertiary specializations tends to be lower as patients seek care outside the GCC region.

A fragmented primary care system

A fragmented primary care system and the lack of a strong general practitioner culture means that patients in the GCC region are less likely to develop personal relationships with their clinicians, leading to patients feeling less connected to their physicians. In addition, the patients are likely to visit a number of different doctors, putting a higher reliance on the accuracy of medical records and resulting in slower resolution rates and inconsistent diagnosis.

Lack of proper system integration and HMS systems

Although advances in this space are being made at a national level in some countries, data is fragmented and is currently collected, owned and managed by different health care provider functions, resulting in a lack of consistent information.

Lack of standardized health care outcomes and patient experience metrics

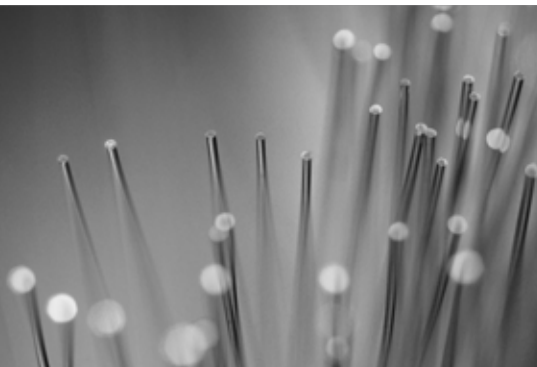
Methods of public reporting of quality, patient satisfaction data, and other indicators of patient experience are not standardized, creating a gray area for regulatory authorities to redesign the health delivery system and improve patient experience

Understaffed and overworked healthcare professionals

Health professionals often do not take the time to provide comprehensive diagnosis and care options to patients due to the large volume of patients seen during clinic hours.

Low patient awareness

Sources of information are sometimes fragmented or unavailable, with a lack of a central source for truth, resulting in patient frustration and over-reliance on word-of-mouth sources. This fragmentation can also lead providers to underuse, overuse and misuse services, posing a cost implication that will impact the provider's service quality.



Our study have shown that the health care ecosystem should focus on key experience drivers that can improve quality of care and patient satisfaction.

Patients' end-to-end service experience – from discharge information, care transition, health literacy and information exchange across departments or entities – needs to be streamlined. Patients value effective communication from health care professionals about their treatment and want to feel empowered about their health. They value consistency in treatment and chronic disease management, as well as easy and timely access to health care services. Patients need to

trust the health care system; they need to feel their condition is confidential, their privacy is respected, the service is personalized and they receive constant support. Patients value the quality of care and build their own perception about it. They value the need to improve its channel availability and integrate digital into the experience life cycle. Lastly, physical environment, such as cleanliness, signage, ambiance, layout and facilities, remains crucial in patient experiences.

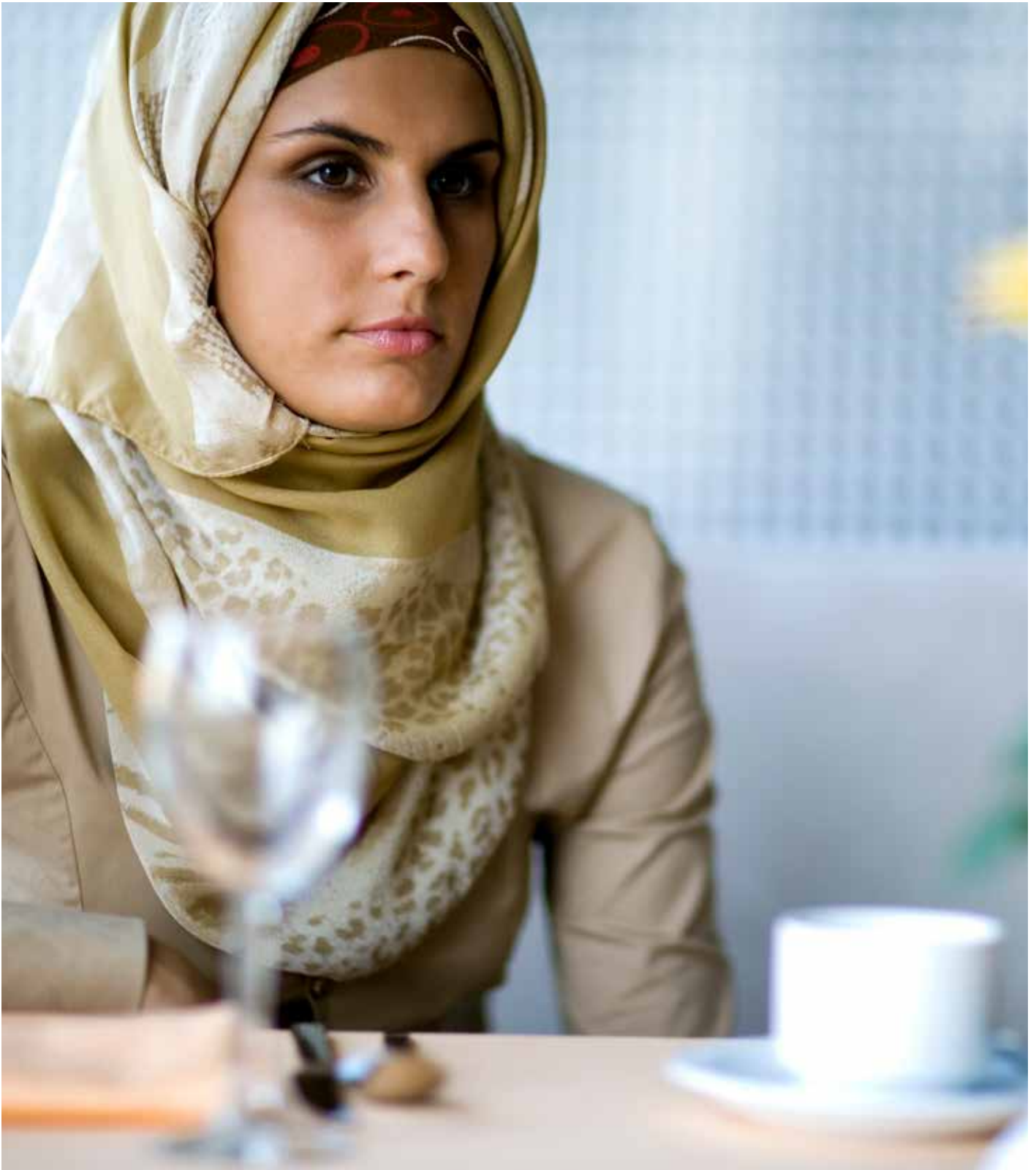
Patient experience drivers

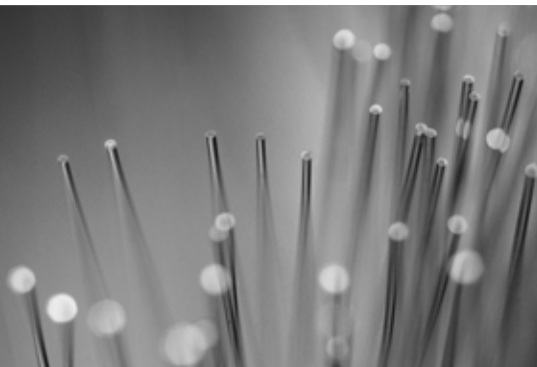
Driver	Sub driver				
Engagement	Communication with staff	Patient participation	Effective communication	Communication about medicine	Health empowerment
Reliability	Consistency in chronic disease management	Timely access	Responsiveness	Accessibility to care	
Evidence-based care	Perception of quality of care	Discharge information	Care transition	Quality of care	Health literacy
Emotional comfort	Respect	Trust (confidentiality and privacy)	Family support	Tolerance (culture, religion, gender)	
Physical environment	Cleanliness	Signage and wayfinding	Ambiance	Facilities	Layout
Digital	Digital adoption	Channel availability	Digital integration	Health literacy	Functionality

What can be done to improve patient experience in the GCC region?



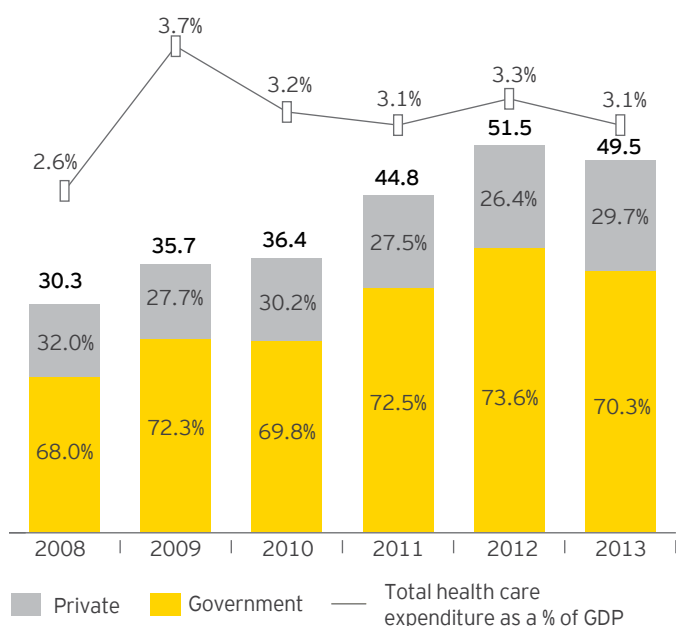
It begins with the government.





Although the GCC governments are continuously increasing health care expenditure, investing in eHealth initiatives, medical performance improvements and preventive care programs, the effects on improved patient experience are not yet apparent.

Health care expenditure in GCC, US\$b



- ▶ Over a period of five years up to 2013, health care expenditure in the GCC countries grew at a CAGR of 10.3% to US\$49.5b.
- ▶ Private expenditure in the sector grew at an 8.8% CAGR between 2008 and 2013, slower than the growth in government spending (11.0%).

... improves patient experience through all the stages of citizen journey starting from self management to financial interactions by ...

- ▶ Spreading health awareness around various ailments
- ▶ Screening programs to diagnose non-communicable diseases at early stages
- ▶ Programs aimed at early detection and reporting of communicable diseases
- ▶ Vaccinations

Governments are expanding and upgrading their health care systems to match international standards. By continuously increasing their investments, the GCC countries are directly or indirectly affecting patient experience.

Medical performance improvement

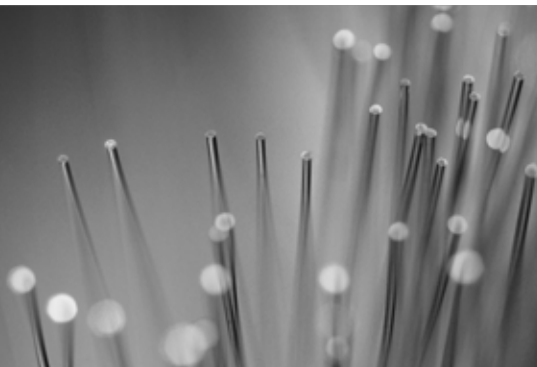
... improves patient experience through all the stages of citizen journey starting from self-management to financial interactions by ...

- ▶ eVisits
- ▶ Digitization of electronic medical records (EMR)
- ▶ Data management, including cloud storage and virtualization
- ▶ Mobile applications
- ▶ Remote patient monitoring
- ▶ mobile health (mHealth) services together with telecom operators
- ▶ Telemedicine
- ▶ Automation of medical centers
- ▶ Other digital capabilities

... improves patient experience through increasing quality of services during care delivery interactions by ...

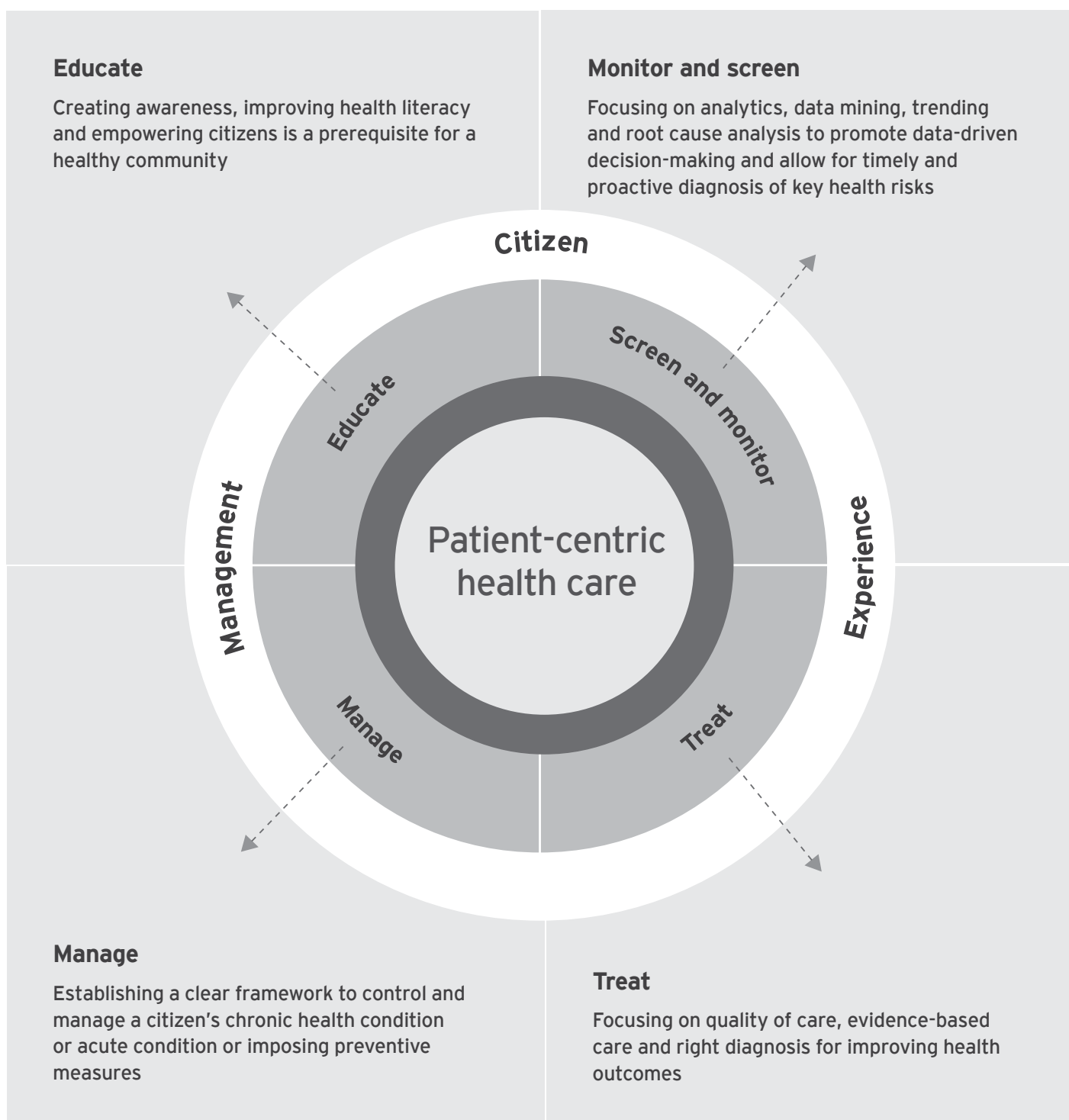
- ▶ Launching "Centers of Expertise" in state hospitals
- ▶ Training programs for doctors
- ▶ Hosting specialized seminars and workshops
- ▶ Collaborative research programs with world's leading health care institutions

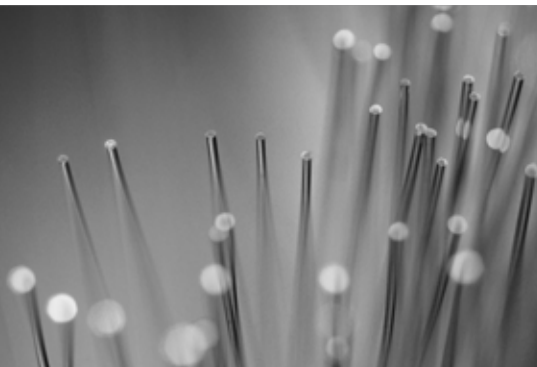
Sources: GCC Healthcare Industry Report, 16 February 2016, Alpen Capital; EY analysis



Governments need to recognize that their core purpose with regard to health is to enable “citizens to live healthy lives” and put them at the center of government thinking by creating an integrated system that increases focus on prevention through education, monitoring and screening.

“Health care systems exist to serve the citizens”





The journey to patient-centricity begins with understanding the needs and wants of citizens across the health care life cycle ...

Better engagement

Better experiences

Better outcomes

1

This journey constitutes the interaction of a citizen, who wants to lead a healthy lifestyle and will require preventive measures

2

This journey constitutes the interaction of a citizen presenting symptoms that trigger an interaction with a health care provider

5

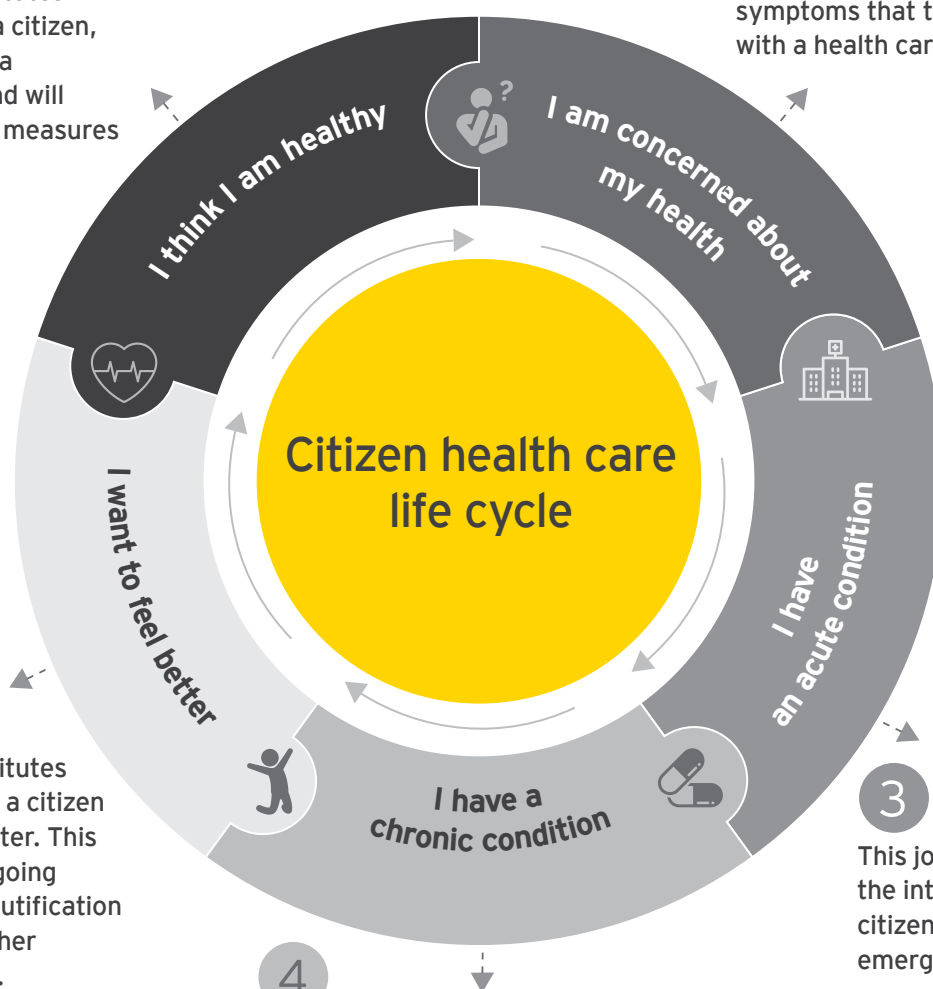
This journey constitutes the interactions of a citizen seeking to feel better. This can include undergoing enhancement, beautification procedures and other wellness activities.

4

This journey constitutes the interaction of a citizen with a long-term condition that interacts with the health care ecosystem at multiple times

3

This journey constitutes the interaction of a citizen suffering from an emergency situation or non-emergency condition with a health care provider

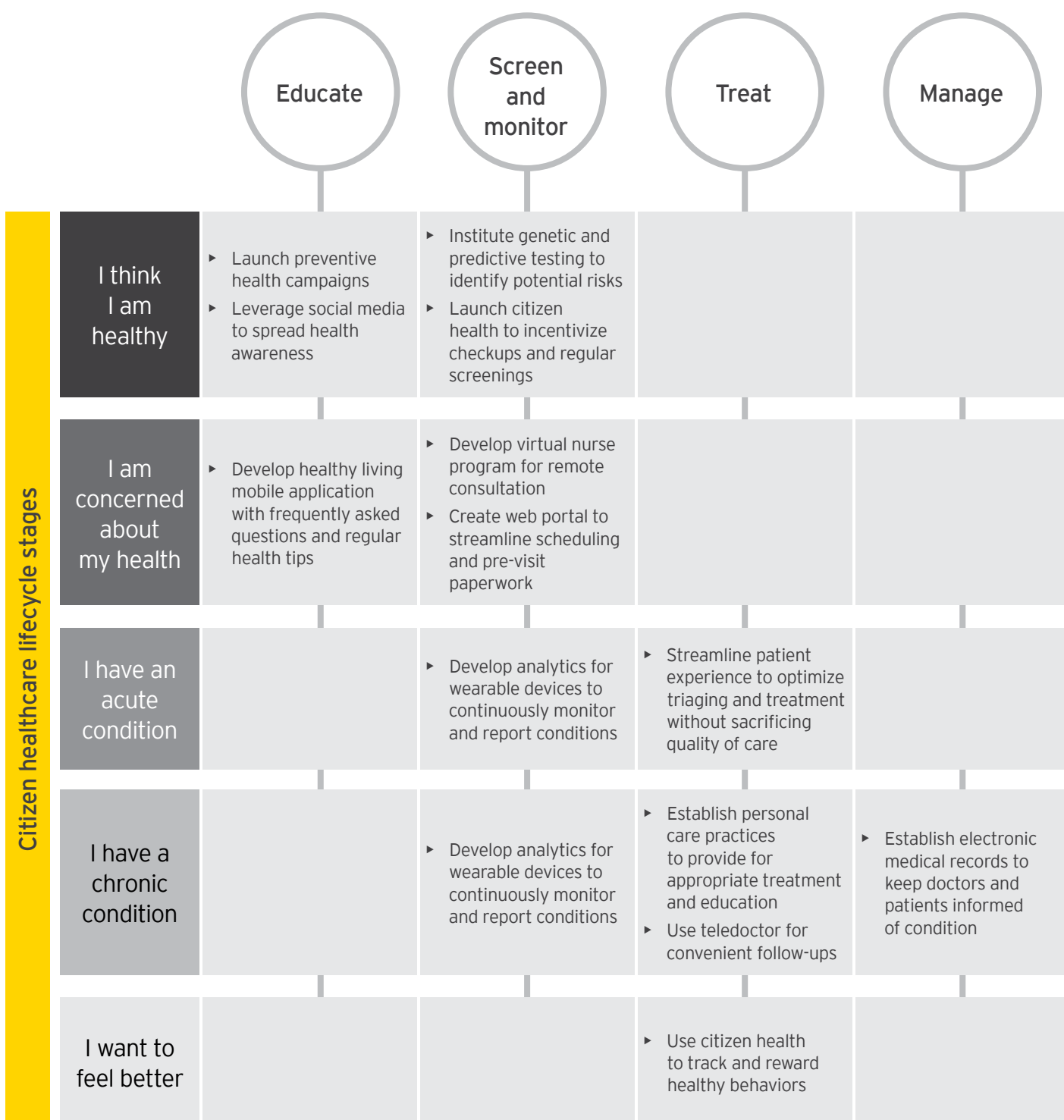


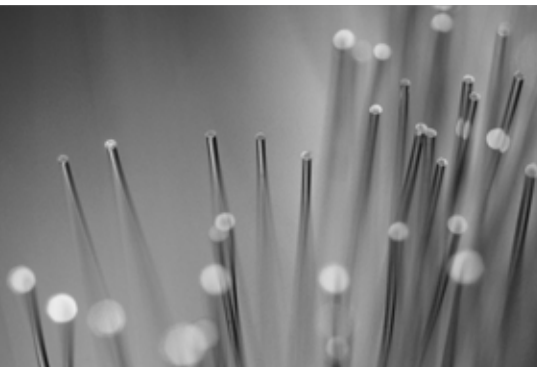
A citizen experience health care life cycle seeks to map end-to-end citizen experiences related to the provision of health care services.



... and defining initiatives across the life cycle that meet citizens expectations, and drive better engagement, experiences and outcomes.

Intervention areas across the citizens healthcare lifecycle elements of patient centric health





Patient experience of the future leverages digital trends. Better engagement creates better experience and better outcome.

Better engagement

- ▶ With an increased demand for patient education, awareness and preventive medicine, most governments and hospitals are aggressively pursuing better engagement through social media, digital technologies, and gamification:
- ▶ **Citizen health:** Leveraging gamification can incentivize citizens to take ownership of their health and take necessary measures for leading a healthy lifestyle.
- ▶ **Social media:** Twitter, web forums and other social media platforms are enabling widespread engagement between medical personnel and citizens.
- ▶ **Mobile applications:** New mobile applications have improved patient access and awareness through informational and diagnostic applications.

Electronic health records

Social media

Mobile health applications

Preventive education

Citizen health

Better experiences

The growing trend of customer centricity has expanded into the medical space, creating greater demand for patient-centric care that meets patient expectations and best practices from the private sector:

- ▶ **Patient experience:** Multibillion-dollar investment in patient-centric care from leading global hospitals is leading the drive to revamp patient experience.
- ▶ **Citizen health:** The drive to institute citizen health programs will allow a connected health ecosystem to provide patients with the on-demand help, education and information they need.
- ▶ **Connected experiences:** Integrated experiences that connects the doctor's office to a patient's computer and cellphone have made health care more accessible and convenient.

Patient experience

Connected experiences

Citizen health

Smart dust

Personalized medicine

Better outcomes

Cutting-edge developments in medical devices, diagnosis and digital have ushered in a new era of medical technology that enables better outcomes:

- ▶ **Wearables:** New devices that are carried/worn by individuals 24/7 provide constant medical information, allowing better monitoring and evaluation.
- ▶ **Telemedicine:** The digital revolution is facilitating virtual patient-doctor interaction and doctor-to-doctor training/consulting, resulting in real-time results for a fraction of the cost.
- ▶ **Screening:** Advances in genetic testing and predictive analytics are identifying problems at a rapid rate, allowing proactive education and treatment.

Genetic screening

Data and analytics

Wearables

Telemedicine

Artificial intelligence

Sensors and devices



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