



Improving the patient experience

Insights for healthcare professionals from
the KPMG US Customer Experience Excellence
Report 2023-24

A KPMG perspective, with supporting data
and analysis from Press Ganey

PressGaney

August 2024

It all comes down to human experience

While every human being is unique, we share many characteristics, in particular the desire to be seen, heard, respected, and valued as individuals. Whether we are at work, at play, shopping, seeing a healthcare professional, or filing an insurance claim, we want a personalized, engaging, and frictionless experience. And when we enjoy an excellent experience in one type of interaction, it informs our expectations for the caliber of others going forward. What might have once been deemed outstanding service can very quickly become table stakes.

No matter the sector, excellence in our personal experiences with companies produces measurable advantages—increased satisfaction and loyalty, accelerated growth, improved operational efficiencies, and reduced costs. That's why so much time, energy, and resources today are invested in improving the human experience in all types of interactions. Although perhaps ironic, such enhancement is increasingly aided and abetted by distinctly nonhuman technologies, particularly artificial intelligence (AI). Regardless of how it's achieved, the importance of delivering excellence in experience is critical to long-term success.



The annual *KPMG US Customer Experience Excellence report*¹ monitors customer experience and expectations, how these change from year to year, and what market leaders are doing to get it right. This companion report, *Improving the patient experience: Insights for healthcare professionals*, looks specifically at the US-based healthcare organizations included in the larger KPMG study.

We augment its findings with data and analysis from two reports from Press Ganey, a leading healthcare performance improvement solutions company: *Patient Experience in 2024*,² which analyzes data from 6.5 million patient encounters across the US, and *Employee Experience in Healthcare 2024*,³ which analyzes data from 2.2 million healthcare employees representing 395 health systems in the US to better understand the workforce in the healthcare sector.

The picture we see emerging from these studies is that the quality of the patient experience is directly linked to satisfaction among healthcare workers.

1. Source: KPMG US Customer Experience Excellence Report 2023-24.

2. Source: Press Ganey Industry Insights: Patient Experience in 2024.

3. Source: Press Ganey Employee Experience in Healthcare 2024.

Healthcare: A difference in degree, not kind

What is true about expectations for experience in other sectors is just as true for healthcare, but the stakes are much higher—it's not hyperbole to say that in healthcare, excellence in patient experience can be a matter of life and death. Everything in healthcare is connected. All experiences—whether of providers, payors, or patients—are interlocked.

Results of the KPMG US Customer Experience Excellence Report 2023-24 show that patient experience with healthcare organizations is improving relative to other sectors. Fifteen healthcare organizations were included in the 2023 study; five of them—Mayo Clinic, Humana, United Healthcare, Kaiser Permanente, and Medicare—ranked within the top 100 organizations across all sectors. No healthcare organization was so ranked in 2022.

The KPMG survey ranks individual organizations using a Customer Experience Excellence (CEE) score—a value from zero to 10, 10 being excellent—with the total score for each organization as a weighted average across all survey questions. Scores

are recorded for their customers' 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.





KPMG US Customer Experience Excellence Report 2023-24

For the past 14 years, KPMG has fielded a survey asking consumers about their individual experience with brands. In 2023, more than 10,000 US customers were interviewed and asked to rate their experience with 282 US brands, across a variety of sectors, including healthcare. The KPMG US Customer Experience Excellence Report 2023-24 explores how organizations find the right balance between automation and human touch, which healthcare organizations made the Top 100 brands, and why.

Read the report.

The six pillars of experience

The six pillars are fundamental components of every great customer experience identified and validated through more than 1.7 million evaluations across multiple markets over eight years.



Overall, the US CEE index declined by five percent in 2023, with all sectors declining from their scores of the previous year. Relative to other sectors, however, healthcare showed improvement, moving up from seventh place to the number five position in overall sector rank, despite a 32 percent decrease in CEE average performance, and a decrease across the board in pillar rankings. Recommendation drivers in healthcare in 2023 were quality of available services, price/rate value, and range of available services.

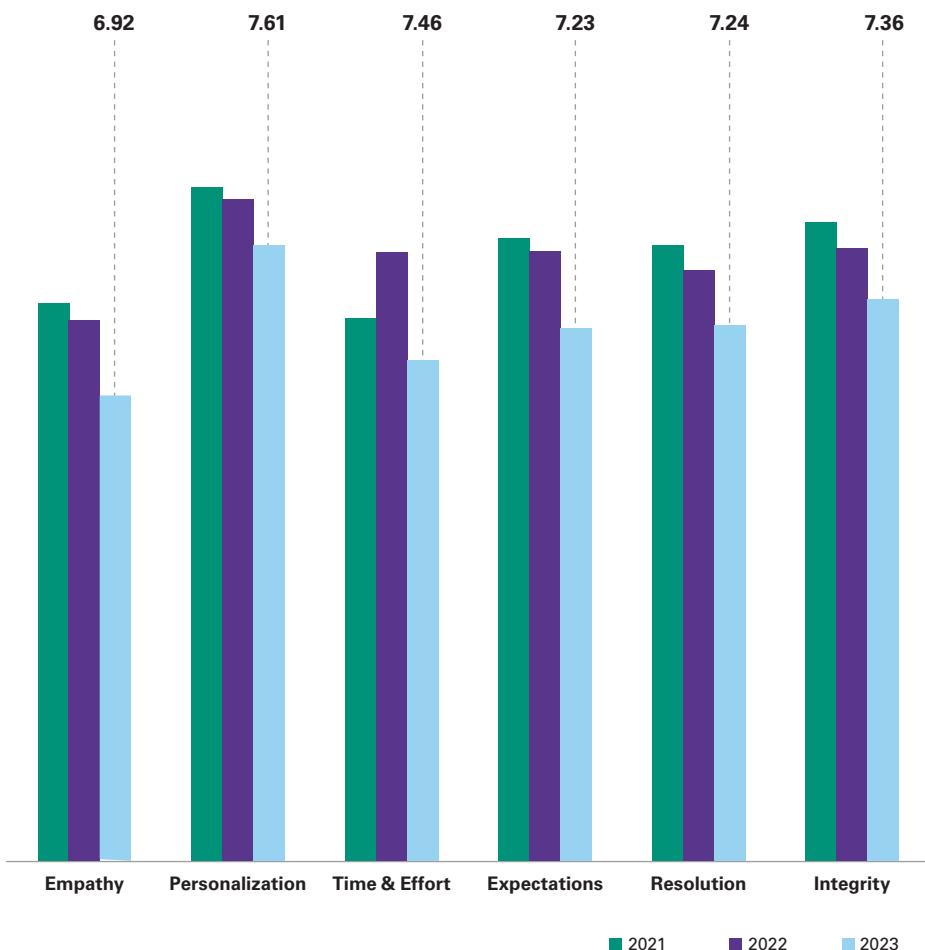
2023 US average CEE performance by sector



Six pillar average performance in healthcare

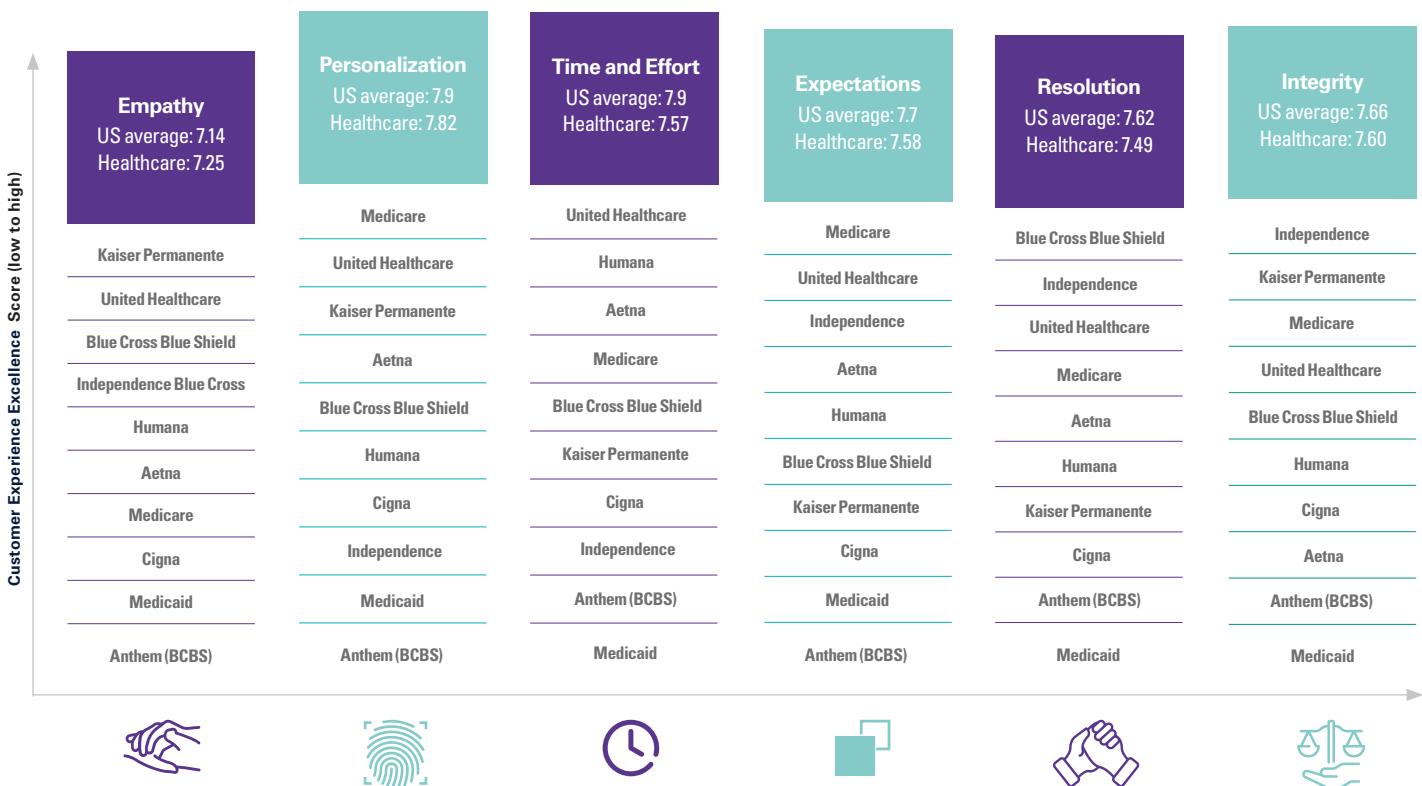
Healthcare average – Six pillar performance over time

- All pillars decreased in average performance year-over-year, with Empathy and Expectation having the largest drop at 0.35.
- Personalization remained the highest performing pillar with Time and Effort in second place.



The Press Ganey *Patient Experience in 2024* report shows a slightly brighter picture, with healthcare seeing an outright improvement from the previous year rather than just a relative one. Similar to the KPMG CEE score, Press Ganey uses a Likelihood to Recommend (LTR) score to measure patient experience. In 2023, LTR scores across ambulatory surgery and medical practices reached a five-year high. Hospitals and emergency departments are also on the upswing year over year but have yet to fully recover to prepandemic levels. Most settings, aside from ambulatory, where LTR scores are leveling off, are continuing their upward climb and are even projected to hit record highs this year.⁴

Pillar performance by healthcare organization



4. Source: Press Ganey Industry Insights: Patient Experience in 2024.

Bright lights in healthcare

Mayo Clinic maintains its position of excellence as the top performing brand in the healthcare sector, ranking highest in every pillar but resolution, and at number 13 across all sectors for customer experience excellence.



Humana takes the prize for most improved player, showing the largest increase in CEE ranking, and moving up 119 places from 145 to 26 in all sector rankings. Personalization was its leading pillar, followed by strong performance in both integrity and time and effort. How did the organization make such dramatic gains?

Humana earned its improved ranking through a very deliberate effort to understand patient concerns and address them systemically and systematically by changing company culture—a prime example of how leadership, values, communication, and employee engagement can yield excellent patient experience. The effort sprang from key customer pain points that Director of Consumer Experience Geeta Wilson identified in 2014. Pain points included frustration understanding claims and coverage, friction in the prescription filling process, and a need for cost transparency. Cultural change is working.

In 2022, Forrester ranked Humana as highest among peers for clear communication, transparent premium and fees, and customer service⁵—improvements reflected a year later in the 2023–24 KPMG US Customer Experience Excellence survey. In fact, a focal point for Humana is building trust with members in every interaction, in line with their strategy to always put members first. As one patient put it: “They are a good provider of healthcare and are always looking out for you as a person and not just a number.”

5. Source: Forrester, “The US Health Insurers Customer Experience Index Rankings, 2022,” November 30, 2022.

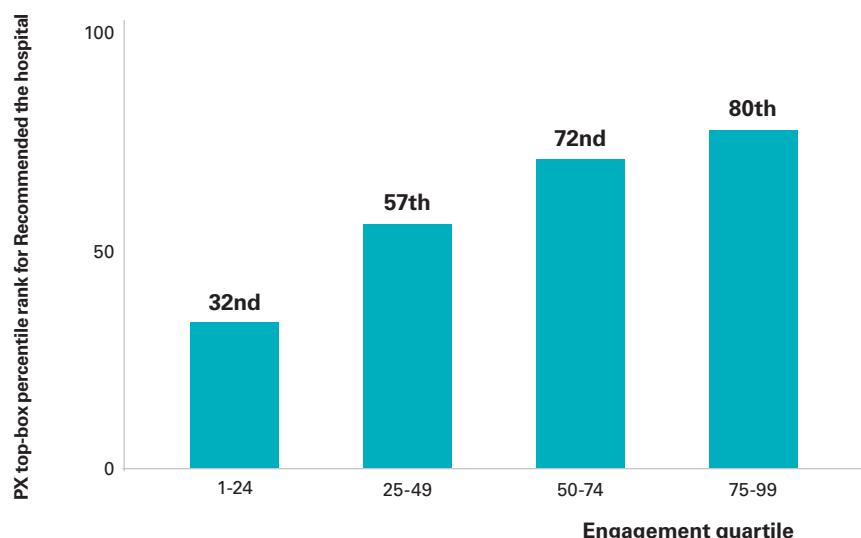
Achieving excellence in patient experience: The importance of looking inward

To shed further light on achieving excellence in patient experience, we turned to the Press Ganey *Employee Experience in Healthcare 2024* report, which underscores the impact of looking inward to improve patient experience. Specifically, its data shows that if you seek to improve patient experience in your organization, you should start with a hard look at your own employees' experience. Great patient experience starts with extraordinary employee experience.

The Press Ganey report details the ways in which employee experience impacts operational success. Data demonstrates a direct link between employee experience and the rest of an organization's results—excellence in employee experience drives excellence elsewhere. Top workforce engagement facilities (those ranked above the 75th percentile) are three times more likely to be top performers for patient experience. They perform higher in other key areas as well—safety and clinical outcomes.

Employee engagement is essential. It is an index of an individual's emotional and personal connection to the organization, as influenced by the work environment. The study measures engagement based on items that assess an employee's connection to and satisfaction with work, intent to stay, and "likelihood to recommend" their employer. Not only are highly engaged employees more likely to stay, Press Ganey research shows that having more engaged employees, especially nurses, leads to higher safety and clinical outcomes, and a better patient experience.

Impact of engagement on recommended the hospital

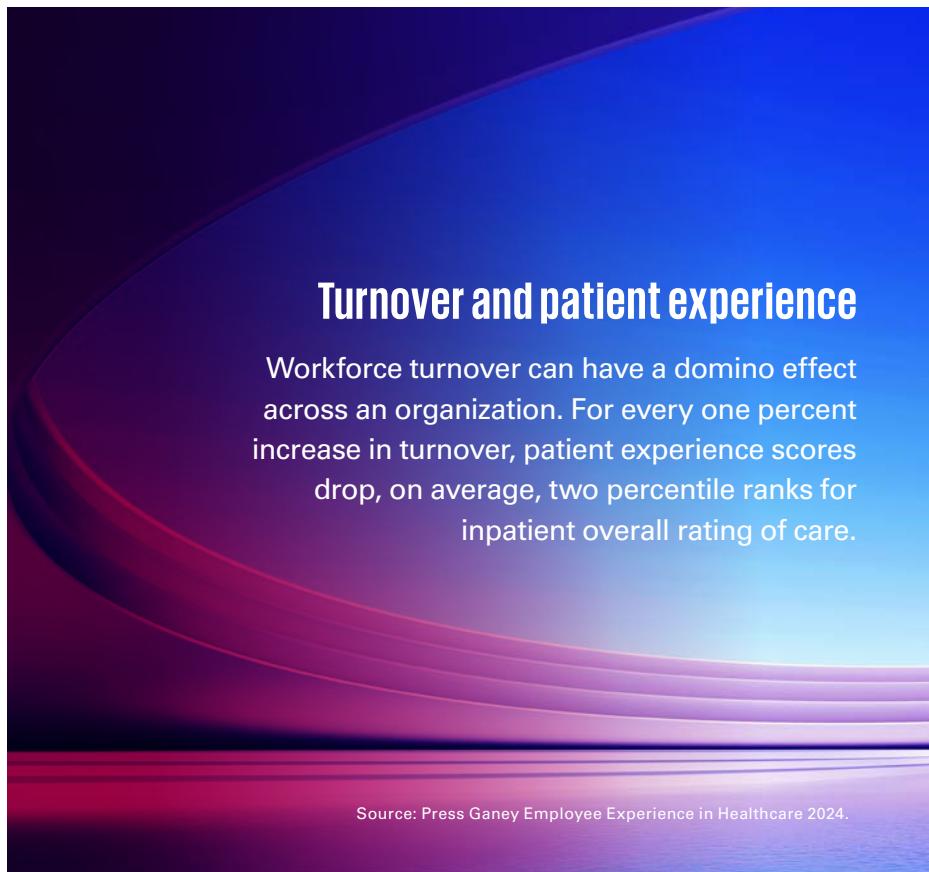


Source: Press Ganey Employee Experience in Healthcare 2024.

Top workforce engagement facilities are **three times more likely** to be top performers for patient experience.

Engagement by role

Despite a reported upswing in engagement, fully one-third of the healthcare workforce reports a lack of engagement. That low engagement comes at a cost—among its side effects are lower patient experience scores.



Turnover and patient experience

Workforce turnover can have a domino effect across an organization. For every one percent increase in turnover, patient experience scores drop, on average, two percentile ranks for inpatient overall rating of care.

Source: Press Ganey Employee Experience in Healthcare 2024.

For every one percent increase in turnover, patient experience scores drop, on average, two percentile ranks for inpatient overall rating of care. Similarly, low engagement increases likelihood for safety events, and higher rates of burnout and turnover—a vicious cycle that will continue to drive adverse outcomes if organizations don't take action.

Press Ganey reports that feeling respected is the number one driver of employee engagement and satisfaction, corroborated by the *KPMG American Worker Pulse Survey 2023*,⁶ which found that 41 percent of healthcare employees indicated that feeling disrespected in the workplace is a top reason to make them want to leave an organization. Other positive drivers of engagement include the active involvement of senior management in modeling mission and values, conducting business ethically, and promoting patient safety.

6. Source: KPMG LLP, "The future of work," KPMG American Worker Pulse Survey 2023, December 2023.



Key drivers of engagement

Employee respect and safety	<ul style="list-style-type: none">• Organization treats employees with respect• Organization cares about employees safety	<ul style="list-style-type: none">• Employee perspectives included in decision-making
Senior leadership	<ul style="list-style-type: none">• Senior management actions support mission/values• Senior management promotes patient safety	<ul style="list-style-type: none">• Confidence in senior management leadership• Organization conducts business ethically
Quality	<ul style="list-style-type: none">• Organization cares about quality improvement• Organization cares about its patients/customers	
Job security	<ul style="list-style-type: none">• Satisfaction with job security	

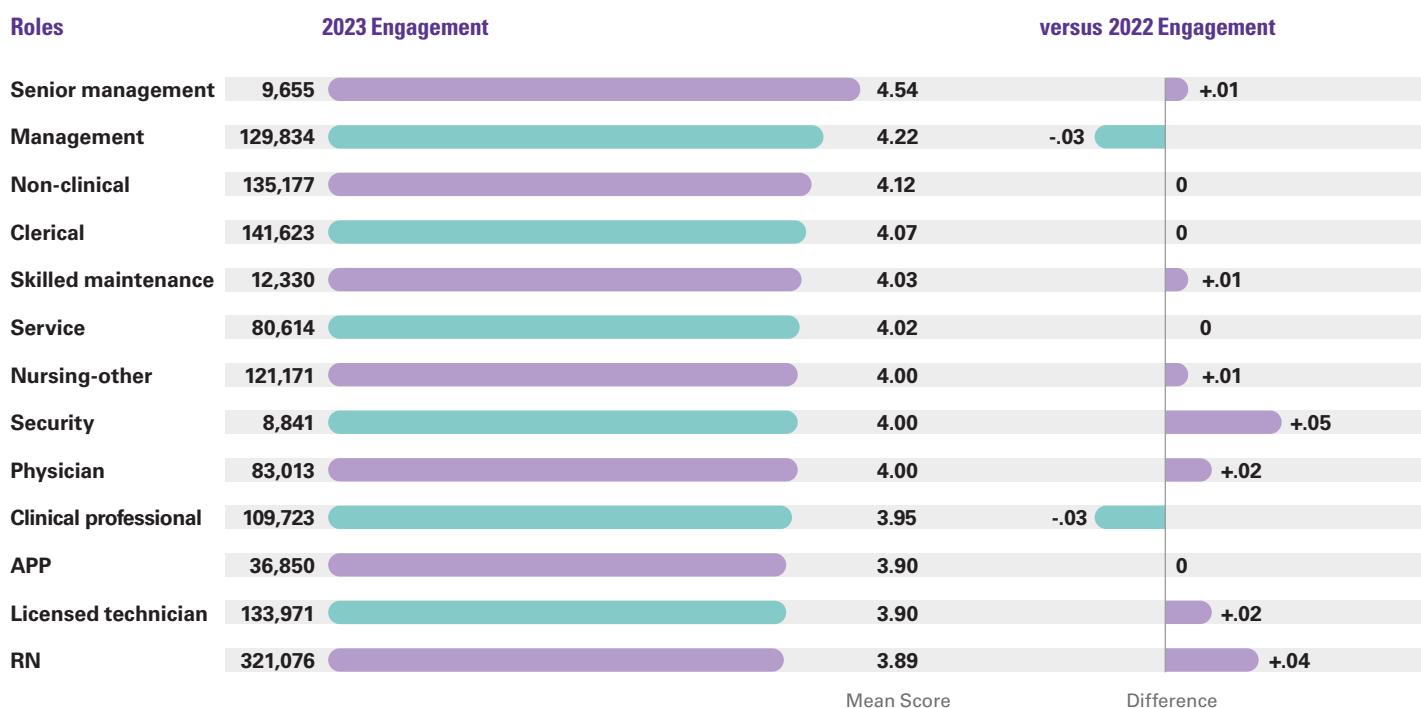
Source: Press Ganey Employee Experience in Healthcare 2024.

Top performers on engagement rate feel respected by the organization 90 percentile points higher than bottom performers. Employees' perception of respect by their organization grew 1.5 percent in 2023—with gains across all roles. The downside is that 26 percent of employees still don't feel that their organization consistently shows them respect.⁷

7. Source: Press Ganey Employee Experience in Healthcare 2024.

Building a culture of ownership at every level has a huge impact on perceptions of respect. Success never blooms in silos. But breaking down those silos requires collaboration, connection, and communication. When leaders share engagement survey results, involve their teams in improvement planning, and provide updates on progress, the people who report to them are 23 percent more engaged than the rest. Acting on employee feedback is foundational to building a culture of respect.

Engagement by role



Source: Press Ganey Employee Experience in Healthcare 2024.

Eight ways to put experience insights into practice

So how can healthcare organizations improve their experience ratings and foster success with employees and patients alike? Organizations that commit to a few key strategies can set the wheels in motion for meaningful change, both in the near and long term.

1 Don't assume technology alone will solve the problem: Especially with the power of AI, it can be tempting to assume that a technology that creates personalized and more engaging experiences will by itself solve your patient experience challenges. Technology will play a key role, but it's not the only member of the cast. The values of the organization, what it stands for, its purpose, and its environmental and societal commitments are all important areas to imbue into the experience—digital or not. Expressing the brand personality through every interaction will be vitally important if the emotional connection between brand and the user is to be sustained.

2 Connect the dots between employees and patients: Recognize the tight connection between employee engagement and satisfaction and the patient experience. They go hand in hand. Looking at patient and employee experience data in silos leaves gaps that can derail progress. You need to see the full picture to ensure the right levers are pulled, by the right people, at the right

time. Tailoring support and experience to each individual's unique needs is critical to success.

3 Segment your data: A one-size-fits-all approach to your stakeholders, both patients and employees, won't drive meaningful change. For example, segmenting employees by role, unit, tenure, shift, age, race/ethnicity, gender identity, and more can help you understand the nuances of a diverse workforce's experiences. Similarly, segmenting patients can help you understand the diverse needs and preferences of each patient segment, and how these may change over time. Tailoring support and experience to each individual's unique needs is critical to success. Drilling down into your own data can help unlock the secrets to personalization, and what will make the maximum impact.⁸

4 Listen continuously: Elevating employee engagement and retention as well as the patient experience requires an authentic listening strategy—one that lets you regularly gather, analyze, visualize, and, most importantly, act on feedback. How



is your organization performing against the six pillars of experience excellence? How do your employees rate their engagement with your organization? It's important not only to do an annual "health check," but to also have regular check-ins throughout the year—via "walkabouts," surveys, or even crowd sourcing—to make sure interventions are working or see why they're not. By creating a positive feedback loop, you can gain deep insight into workforce and patient needs. Then, you can use this information to drive meaningful, intentional change.⁸

8. Source: Press Ganey Employee Experience in Healthcare 2024.



5 Build social capital and culture:

Connection and relationships form the building blocks of social capital and fuel an exceptional human experience for both employees and patients. This kind of ongoing engagement and communication can help build trust, increase staff and customer retention, support growth, and create a culture where all stakeholders can thrive.⁹

6 Harness the power of AI to accelerate speed to insight:

While technology alone can't solve the problem, it is a necessary ingredient. AI holds the key to unlocking deeper insights from your experience data and to enabling personalization strategies at scale. Natural language processing, for example, can help organizations make sense of unstructured data and verbatim text faster and more accurately. Then, AI can translate those insights into actionable strategies, offering targeted improvements you can implement immediately, to calculate retention risk, improve engagement,

deliver personalization, foster durable relationships, and build a stronger organization.⁹

7 Humanize the technology: The human experience is of uppermost importance. Any AI implementation must be human centered and must address key pain points, not introduce more. When used as a frontline interface, it can easily become a barrier that can deter users, not only from the transaction but also from your organization. Focus on creating value, for you, your patients, and your employees. You can look to reduce costs but not at the expense of the customer or employee relationship, and above all, ensure that your use of this advanced technology is transparent, ethical, and responsible.

8 Start building an AI ready culture

now: The introduction of AI can create anxiety among employees, which can lead to lower levels of performance, commitment, well-being, and trust in the organization.¹⁰ The result can be an organizational culture that forms a major barrier to any AI effort. Organizations such as Humana have succeeded by involving employees throughout the entire process. They position AI as a digital workplace colleague, there to support and assist employees in achieving more. They are developing their people with the skills and competencies to both use and manage AI models in advance of the tool's deployment.

9. Source: Press Ganey Employee Experience in Healthcare 2024.

10. Source: Understanding and Exploring the Concept of Fear, in the Work Context and Its Role in Improving Safety Performance and Reducing Well-Being in a Steady Job Insecurity Period," Diego Bellini et al., Sustainability Journal, 2022.

What's next? Continuing technology-based enablement and a winnowing of players

As in recent KPMG US CEE reports, we predict that technology will continue to be a significant driver not only of patient experience enhancements, but also of improved patient outcomes as well.

AI provides assistance across every segment of the healthcare landscape, from patient dashboards to schedule care and access information and records, to novel applications for providers such as automated radiology readings to assist in interpretation of individual healthcare data and improve collective predictive capability, to powering data-driven, outcome-based compensation structures for payors.

We believe that technology will continue to shape the healthcare landscape through the emergence of precision medicine, where analysis of individual genetic, environmental, and lifestyle

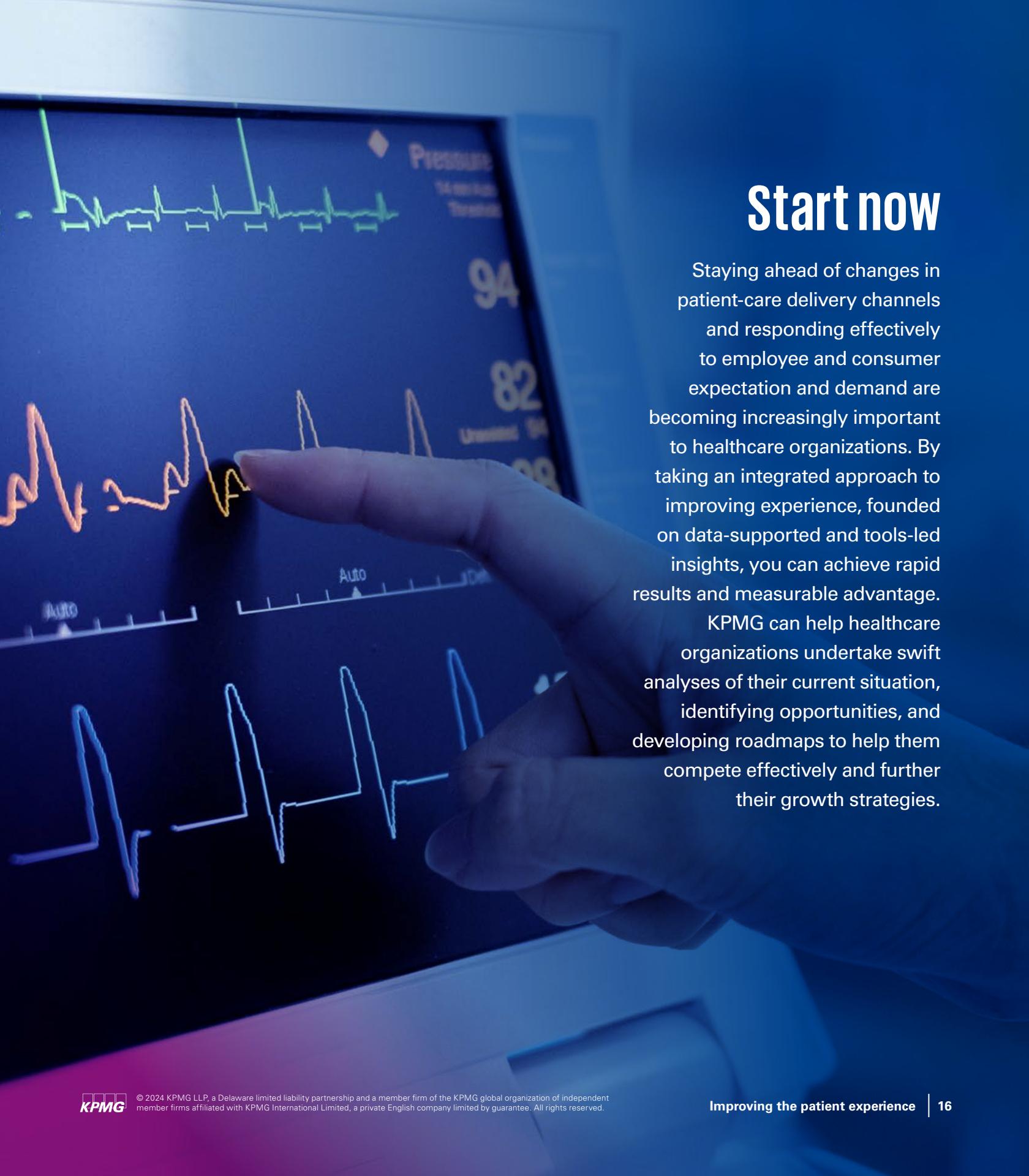
factors are determining course of care and where innovative solutions combining targeted biopharmaceutical therapies, medical devices, and robotics are delivering that care.

Last year, we noted that the convergence of services and nontraditional market entrants—so called “payviders”—could have a dramatic impact on the future of healthcare. Such hybrid healthcare disruptors with vertically integrated services were anticipated to facilitate a seamless experience from delivery of care to management and payment of claims. The payvider concept promised the ability to curate care by patient profile, orchestrate the total healthcare experience, meet the needs of rural communities, and keep service costs down while increasing margins.

However, the combination of rising healthcare delivery costs and difficulties in a reimbursement model based upon volume offsets for lower price points for care prompted at least three major retailers who had hoped to prevail in this space to scale back or shutter their retail clinics.^{11, 12} In 2024, the success or failure of other nontraditional entrants to the healthcare market will further test the approach.

11. Source: CNBC, “Why Walmart, Walgreens, CVS retail health clinic experiment is struggling,” Kevin Williams, June 3, 2024.

12. Source: Fortune, “Insiders reveal why Walmart pulled the plug on Sam Walton’s dream to ‘get the hospitals and doctors in line,’ Jason Del Rey, May 7, 2024.



Start now

Staying ahead of changes in patient-care delivery channels and responding effectively to employee and consumer expectation and demand are becoming increasingly important to healthcare organizations. By taking an integrated approach to improving experience, founded on data-supported and tools-led insights, you can achieve rapid results and measurable advantage.

KPMG can help healthcare organizations undertake swift analyses of their current situation, identifying opportunities, and developing roadmaps to help them compete effectively and further their growth strategies.

How KPMG can help

At KPMG, we believe healthcare providers and payors can use technology and innovation to provide higher-quality care, reduce costs, and deliver a more patient-centric experience. Our mission is to assist organizations to transform and innovate in order to effectively compete in tomorrow's fast-changing and dynamic healthcare industry. We offer a market-leading portfolio of methodologies, tools, and services to assist healthcare policy makers, payers, providers, and suppliers as they tackle challenges and transform the way healthcare is delivered.

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About Press Ganey

Press Ganey partners with healthcare providers and health plans to improve the experiences of their patients and workforce by marrying data with unparalleled technology and expertise. Their HX platform unites and enlivens disparate data, enabling clients to gather, analyze, visualize, and act on key insights to retain employees and ensure the care journey is accessible, safe, equitable, and patient-centered. They are the trusted partner to over 41,000 healthcare provider organizations globally and 85 percent of health plans in the United States. Press Ganey is a PG Forsta company.

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