



Experience Excellence in the face of adversity

UK Healthcare Citizen Experience
Excellence Report 2022



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Foreword

Delivering world class care means delivering a world class citizen experience

As the NHS emerges from the biggest challenge it has ever faced, work continues to manage the backlogs that inevitably built as the COVID-19 pandemic became the primary focus. NHS organisations are continuing to evaluate the lessons of the pandemic, refining their plans and formulating new strategies to manage through the recovery and move on to more efficient, future-proofed provision of

services. However, the immediate comes with challenges, community care is a major priority, lack of out of hospital care from community care providers or family members mean that hospitals struggle to discharge patients when they are ready. This backlog impacts all areas of the system, but with a shrinking workforce, lack of clarity over more funding and a challenging winter season putting more pressure on weak foundations, health and care services will be severely stretched. In times of challenge, a citizen-centric approach is even more crucial.

“ It is understanding and acting on what truly matters most to citizens that will enable the NHS to combat resource pressures, whilst in parallel, deliver a world class citizen experience”

Jo Thomson, Partner

Citizen Transformation





In 2022 the government reiterated its dedication to the digitisation of the NHS, which is broadly regarded as the catalyst to real foundational change that citizens will see tangible benefits from. Electronic patient records are at the core of their plans, a capability that will be foundational for the digital and data strategy that NHS England have set for the country. Digitisation and national reform of an industry that will mark it's 75th birthday this year is possibly one of the biggest undertakings a government will ever face, our research points out that the success of this hangs on whether it's designed with and for its users. Core to a citizen centric approach is preventative and proactive care, this is not only essential to take the strain off the acute areas of the system and support a seriously stretched workforce but will allow citizens to take more control and ownership over their own care and rebuild trust in the service itself.

Citizen satisfaction with the NHS has dropped to the lowest levels seen this side of the millennium. Missed expectations drive people away from the care they need, having a detrimental effect on health outcomes, these issues are taking away from the core principles of the NHS which have held it in such high esteem; high quality care when citizens need it, free at the point of use and available to everyone.

The challenges currently facing the NHS may seem insurmountable, however changing behaviours and attitudes present the service with a once in a generation opportunity to

transform how care is delivered for citizens and achieve long-term resource sustainability. Ultimately, reaffirming the NHS as the world class service which we all know it to be.

Evidence suggests that there is an intrinsic link between the experience a citizen has when interacting with the NHS, their attitude towards their own health and their ultimate health outcome. To deliver world class, preventative care, this link must be explored, fully understanding the drivers behind poor experiences and how citizen behaviours can be changed.

Our research shows just how the benefits of citizen-centric design of digital services can and should be exploited, and that accessibility to core services is a must have for overall satisfaction.

On the contrary, our research has also shown that when digital services are not designed to meet the needs of the citizen, they are seen as inferior and untrustworthy. Citizens will always seek care through the channel they most trust, and for digital services to be seen on the same pedestal as face to face, the same level of compassion and trust must be engendered.

Citizen-led, digitally enabled transformation means truly understanding what matters most to citizens and co-designing care pathways with citizen experience at the heart. There has never been a more emotive moment for the NHS, the time is certainly now, and the stakes are great.

Section 1

Six Pillars of Citizen Experience

In the following section, we will address the following questions:

- What is the Customer Experience Excellence centre?
- How can we use the Six Pillars and other customer experience metrics to draw relevant insight for the NHS?



This study is part of the global **Customer Experience Excellence** research programme, a systemic approach to identifying and communicating customer best practice for organisations to learn from.



13 years
of ongoing research
and signals
analysis



39
markets
covered



**CEO and
employee**
interviews



**5.5
million**
customer
evaluations



4,000
detailed brand
reviews



550,000
consumers
interviewed



This year's UK research took place between 15 June and 6 July 2022, which for the NHS, generated

8800 UK Responses and
1600 feedback comments.



The Six Pillars of Experience in Healthcare

We have been measuring The KPMG Six Pillars of citizen experience for 13 years. Millions of evaluations across thousands of organisations have shown time and again that the Six Pillars provide an empirical benchmark for citizen experience excellence.

Empathy

Understanding a citizen's circumstances to drive deep rapport

Demonstrating that the NHS cares about its citizens by ensuring that critical emotional touchpoints are staffed with emotionally intelligent employees. Outstanding staff go the extra mile to relate to and prioritise citizens, meeting citizens where they are emotionally, to empathise with their circumstances.

Personalisation

Treating citizens like individuals and adapting to their needs to drive an emotional connection

Achieved by recognising a citizen's context, including current and previous circumstances, no matter how they choose to access healthcare services throughout their lives.

Time and Effort

Respecting citizen's time by minimising citizen effort and creating frictionless processes

Citizens value their time and need the healthcare system to recognise this and provide efficient, accessible services on their terms. To address this pillar, organisations should design operations to maximise convenience and minimise costs.

Expectations

Managing, meeting and exceeding citizen expectations for service delivery

Outstanding care providers aim to understand the expectations of those they serve and perform above and beyond in order to surpass these. Cross functional issues are a significant reason why citizen expectations are not met in care systems, and healthcare organisations should focus on integration and end-to-end solutions to resolve these issues and exceed expectations.

Resolution

Taking accountability for and dealing with poor experiences competently to minimise inconvenience or distress

Achieved through collaboration across care pathways to solve the citizens problem completely. Empower staff to not only solve problems, but find the root causes, in order to influence healthcare behaviours and champion population health management.

Integrity

Being trustworthy and engendering trust through consistent organisational behaviour and transparency with citizens

For all citizens, the degree to which their healthcare provider delivers on its promises and acts in the best interest of citizens is consistently top of mind. Identify actions and events which erode trust and ensure they are redesigned as a priority, with citizen best interests at heart.

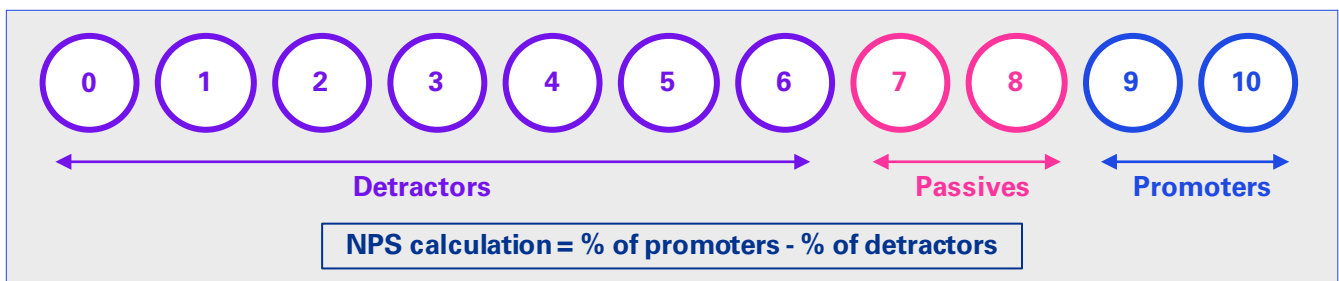
Using Metrics that Matter

Further to the Six Pillars, we have used Net Promoter Score as a measure for citizen satisfaction and to understand what matters most to citizens.

01 Net Promoter Score (NPS)

NPS is a world renowned metric for measuring customer satisfaction. It's typically used to measure advocacy, by asking respondents to rate a brand or service based on how likely they are to recommend them to others. We asked respondents whether they would recommend the NHS based on the service that they have received. The responses are used to determine high or low levels of satisfaction.

NPS is scored on a scale from -100 to +100, calculated by taking the difference between the percentage of promoters and the percentage of detractors. Passives have no bearing on the NPS score. A score of -100 means that every citizen who interacted with the NHS is a detractor and would actively not recommend the service they received. Conversely, a score of +100 means that every citizen is a promoter and would actively recommend the NHS to others.

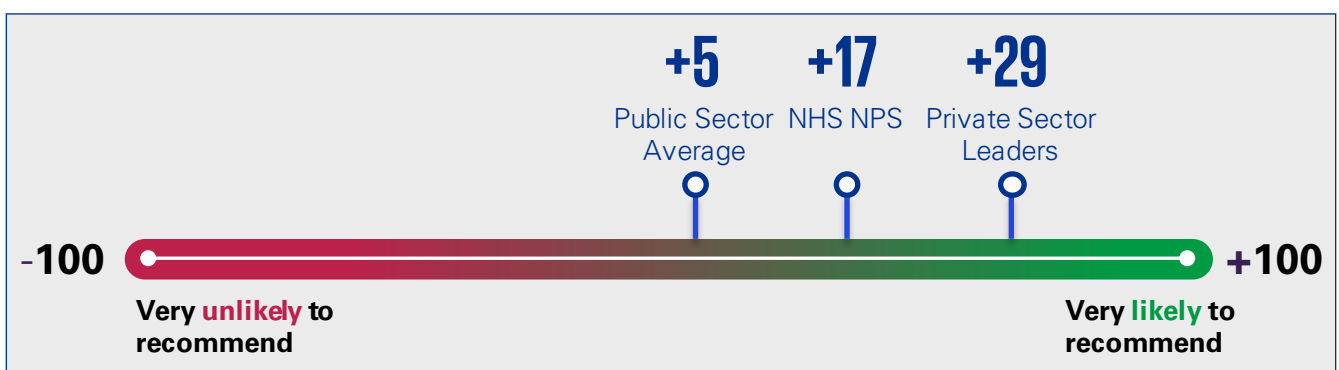


02 Why should we rely on NPS?

The public sector currently lags behind the private sector in its use of citizen experience metrics. This may be because of historically conflicting priorities, however as citizen expectations and behaviours continue to evolve at pace, citizen experience

metrics are crucial in understanding what matters most to citizens and how to deliver services that provide value.

We can use the Customer Experience Excellence research programme to provide benchmarks of what good looks like when it comes to NPS.



Section 2

A Reflection on 2021

**In the following section,
we will address the
following questions:**

- What do the themes we told you last year look like refreshed with 2022 data?
- Has the citizen felt improvement or is it more of the same?







Headline themes from 2021, continue to ring true throughout the 2022 research

The NHS workforce and changing citizen attitudes towards digital services have driven high quality citizen experiences, whilst disjointed services, difficulties in accessibility and changing citizen expectations continue to drive the poorest experiences.

Outstanding frontline staff continue to drive the most positive experiences

Our 2022 research has continued to highlight the empathy, kindness and professionalism shown by NHS staff. On the contrary to 2021, this positive feedback is more representative of the holistic citizen experience rather than being driven by COVID-19, demonstrated by the proportion of COVID-19 related feedback dropping from 60% to 13%.

Over 80% of citizens felt staff were friendly, courteous and honest. NPS **increases by 50 points** when this is the case.

“*Absolutely amazing people. Really listen and take action to answer my concerns. Really approachable and professional at all times*”

Attitudes to digital services have improved, especially for simple interactions

Efficient use of digital channels is driving improved citizen experience. The most positive digital experiences reference simple, easy to use digital services such as; booking online appointments and arranging repeat prescriptions digitally. However, it must be considered that much of this increase in satisfaction could come down to a change in attitude towards digital from citizens.

There has been a **16% increase** from 2021 in citizens saying the digital experience is simple and seamless.

“*Ordered a repeat prescription online, it was issued by a doctor and I collected it from my nominated chemist. No issues*”

Continued frustration at lack of continuity across care pathways

Lack of continuity remains a regular theme for citizen dissatisfaction, particularly when experiences are not seamless and citizens are having to go to multiple departments for resolution. Siloed episodes of care are a key driver behind this dissatisfaction.

NPS **drops by 41 points** when the NHS doesn't recognise a citizens previous interactions, this happens **40% of the time.**

“*Took my son to A&E, waited 9 hours to be seen and was passed from pillar to post. Lack of organisation and common sense. 111 sent him unnecessarily and then they would not discharge us*”



Difficulties in accessing core services are taking away high quality care delivery

The high quality of care citizens receive is one of the most positive factors in their experience, but only once they get past barriers in accessing care. 2021 and 2022 research shows that struggles with accessing GP services, long wait times and slow follow ups detract heavily from overall experience.

NPS **decreases by 49 points** when healthcare services are difficult to access, this occurs **33% of the time.**

“30+ minutes on telephone trying to request an appointment, I gave up. Decided to request telephone appointment via their website. They responded by email 2 days later and gave me telephone appointment 23 days later, absolutely ridiculous service”

A continuing shift in behaviour and expectations towards a service that is no longer going above and beyond

As the effect of the pandemic wears off, tolerance for missed expectations is reducing. Whilst citizens remain understanding of the pressures that the NHS is under, they feel that the service is no longer going above and beyond.

50% reduction in national NPS, mainly driven by a **reduction in promoters** (scoring 9 or 10).

“They are not helpful. I asked multiple times for help with an issue and they did not. I understand they are busy however they should’ve tried more”

Section 3

2022 key insights

In the following section, we will address the following questions:

- What new themes have emerged from the 2022 citizen feedback?
- How can we use the Six Pillars to benchmark the NHS?
- How has this insight been turned into action for Cornwall and the Isles of Scilly ICS?





Key insights for 2022

Our 2022 insights explore the impact of wait times on the citizen experience, the perception of underqualified staff and why virtual interactions are seen as inferior to face to face.



I'm so disappointed in the lack of care & sick of trying to get face to face care and compassion that they are supposed to stand for."

Virtual interactions are seen as inferior to face to face

For many citizens, there is a lack of understanding as to why healthcare services have not returned to how they were pre the pandemic. The pandemic was viewed as a poignant moment in time, where extremity was required to ensure health services could continue to operate, however now citizens are demanding a return to their perception of normality.

There is a clear misconception to be addressed here, changing the perception that the quality of care received through digital services is lesser than the quality received face to face. One of the key themes to call out from the feedback is around compassion and how citizens feel they are not receiving the same level of compassion through digital services when compared to face to face.

The 'human touch' is important to citizens when interacting with any organisation, however for the NHS even more so. To drive satisfaction with digital services, the human element of empathy and compassion must be present. Citizen experience leaders achieve this through providing personalised digital services, whereby an understanding of a citizens circumstances is already known before the interaction takes place.

Insufficient communication and poorly set expectations around wait times are defining citizen experiences

20% of all citizen responses referenced their wait times, both positively and negatively, and often the most memorable factor of the experience is time spent waiting, whether that be for a GP appointment or to be seen in A&E. How long a citizen waits, and in what condition they are waiting, is a defining factor in experience, over and above the quality of the treatment received. The NHS prides itself on quality of care, however lengthy wait times and lack of clear communication to manage expectations, can overshadow positive health outcomes.

In addition to this, research themes show how citizens feel they are being forced to live in pain, without guidance on how to manage their condition, and as a result, in some cases are turning to private healthcare alternatives. However, the citizens who need the healthcare system the most, or suffer from healthcare inequalities, cannot afford private healthcare and feel abandoned by the system that is supposed to care for them.

The problem is twofold, how can healthcare organisations not only manage wait times and wait time expectations and communications, but also ensure that citizens take ownership of their own health to avoid deterioration whilst waiting?



I had blood test and had to wait 3 weeks before I could speak to someone about the results. It may not be important to them but anxious all the same waiting."





A lack of trust in 'under qualified' healthcare staff

For some citizens, there is a perception that healthcare staff outside of the GP are underqualified to give their medical opinion or evaluate a condition at the first point of contact. Whilst we know this perception isn't true in reality, it is driven out of citizens feeling they are not fully listened to and being shown a lack of empathy, at what is often a highly emotional point in a citizen's end-to-end journey.

For many, it's rushing a loved one into A&E and being told that your issue is not a priority and the wait time will be extensive. These are moments of truth which define a citizen's perception of the NHS. Regardless of whether it is the correct medical opinion or not, and for many citizens this is translated into the view that they are right, and the member of staff's opinion was wrong.

When emotional vulnerability is high, citizen experience leaders meet this with empathy and a demonstration of care and accountability for the citizen's problem. For front-line staff, a citizen's problem may be as generic as the next, however for the citizen it is often top of mind and in need of immediate care and attention.



The health care assistant spoke to each person in the waiting room about why they were there, very loud and inappropriately in front of others."

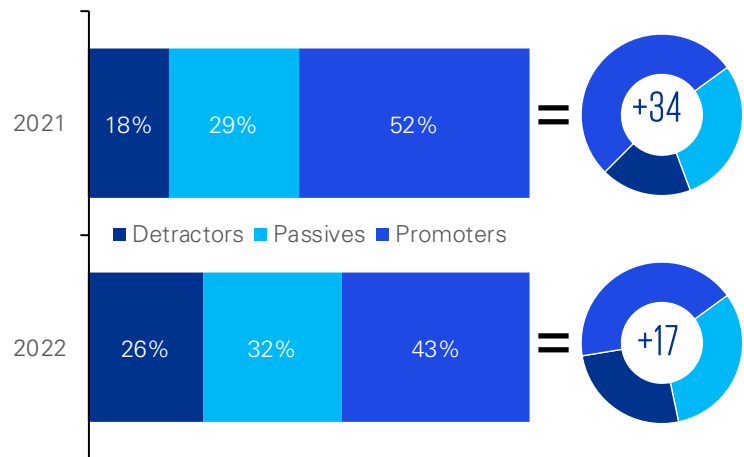


Citizen sentiment towards the NHS decreases for 2022

Net Promoter Score (NPS) for the NHS is +17, which is a 50% decrease on 2021.

This is predominantly driven by a 17% decrease in those who would actively recommend the NHS to others (promoters), and a 44% increase in those who would deter others from using the NHS (detractors).

This compounds the case that fewer citizens compared to last year believe the NHS offers world class care, and that the service no longer goes above and beyond for its citizens, or regularly exceeds citizen expectations.

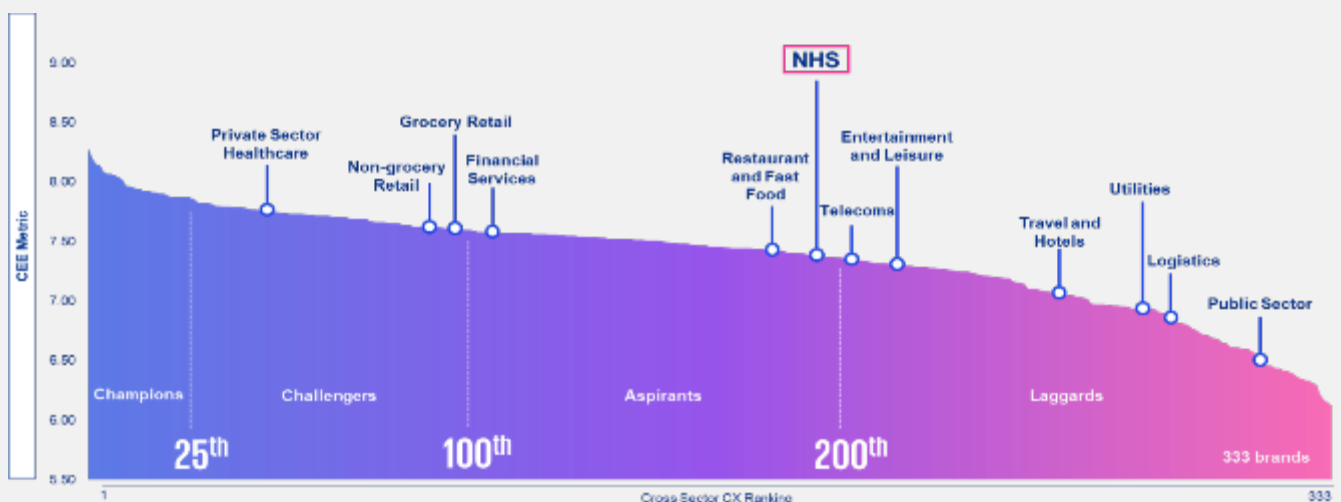


The NHS performs considerably better than the public sector average in terms of citizen experience, however a large gap remains between the NHS and the citizen experience leaders.

The S-curve ranks 333 brands and 10 sectors on their customer experience maturity, taking an average score across our core Six Pillars. The positive news story for the NHS is that it comes close to the top 50% of all ranked sectors and brands. When we compare this against the public average, which ranks in the bottom 10% of all sectors and brands, it is clear that the NHS offers a considerably better citizen experience.

In spite of this, in order for the NHS to deliver truly class care, delivering a world class citizen experience is pivotal, and taking learnings from best practice and applying them to healthcare settings is a powerful lever that can be pulled in order to reduce the gap between the citizen experience leaders and the NHS.

CEE Metric = Average score across the Six Pillars

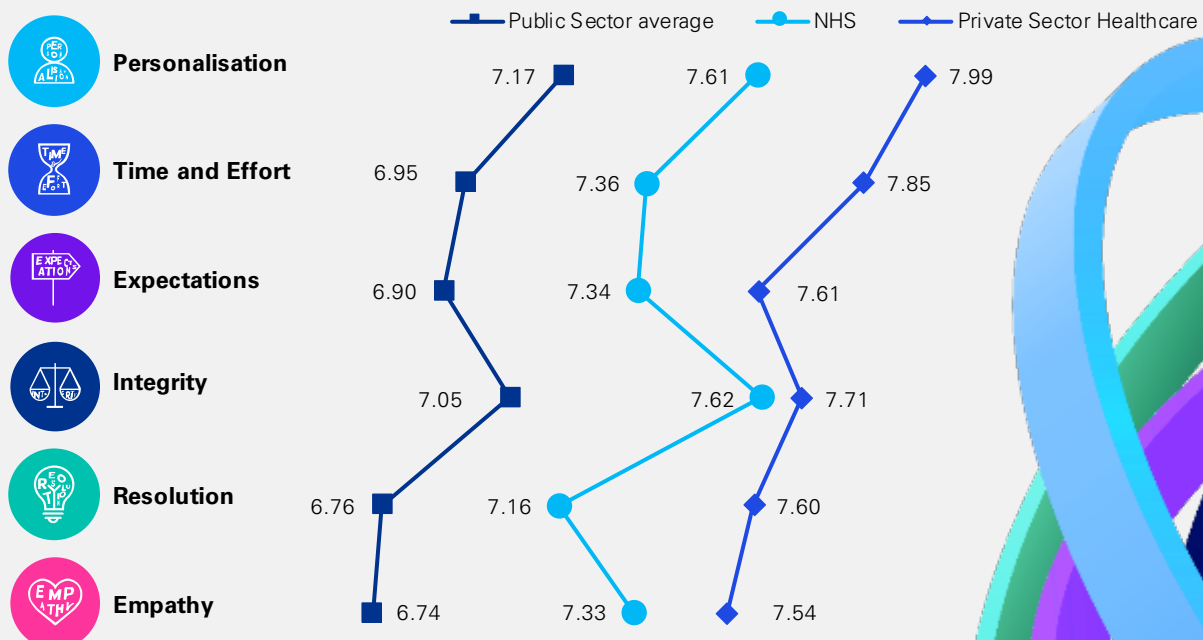
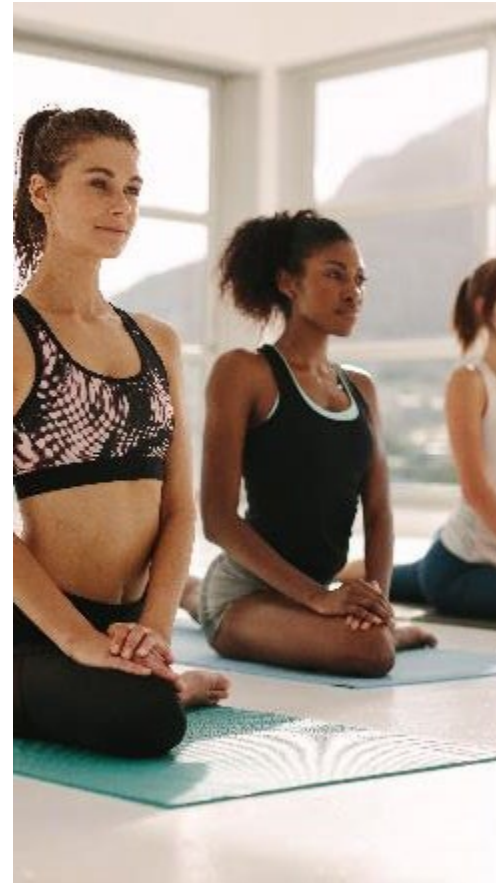


Performance against the Six Pillars of Citizen Experience

Closing the biggest gaps between the NHS and citizen experience leaders requires the NHS to focus on addressing the key insights outlined in this report. The NHS results in the Six Pillars of Citizen experience depicted below reflect these issues and provide another lens through which to understand citizen pain points and identify opportunities for improvement.

In order to achieve a leading citizen experience, organisations must excel across all of the Six Pillars. For the NHS, one of the biggest gaps with private sector leaders is driven out of the **Time and Effort**, and **Expectations** pillars, as demonstrated by our key finding that lack of communication about wait times was the largest citizen pain point. Citizens value their time and need the NHS to appreciate this and provide efficient, accessible services on their terms. Due to the lifechanging impact of health services on citizen lives, high effort for citizens often means prolonging physical or emotional suffering. The worst citizen experiences reflect being forced to live in pain and not knowing when their wait might end, or having to go to great effort for updates on a health condition. This lack of communication and expectation setting leads to confusion and frustration for citizens, which overshadows the quality of the care they receive.

Citizens feeling frustrated at a lack of face to face NHS interactions is also reflected in the below Six Pillar results, specifically around **Empathy, Personalisation and Expectations**. Citizens have reported feeling confused as to why they are only able to access what they deem to be inferior and impersonal healthcare in virtual settings. Resetting expectations around the reasons for this is an important step in addressing this issue, whilst ensuring that the personal, 'human touch' element citizens expect from the NHS is further brought to the forefront of virtual healthcare delivery.



A Spotlight on Time and Effort



Our private sector research tells us Time and Effort is the second most impactful Pillar on customer loyalty, for the NHS this can be translated as a measure of advocacy and the extent to which a citizen trusts the quality of care they receive from the NHS.

Frictionless processes have become one of the defining characteristics of leading organisations, even more so for public sector organisations where interactions have a huge bearing on a citizen's quality of life.

Time and effort for citizens interacting with the NHS can be in the form of physical or emotional, or both. Our private sector research tells us that humans are careful about expending brain power in their interactions, however the key difference for the NHS, is that due to its monopolistic nature, healthcare providers are in control of the time and effort a citizen must expend when interacting with their service; the citizen often has no choice but to endure lengthy and siloed processes.

This, combined with the emotional vulnerability citizens feel during interactions means that any inconveniences experienced are felt much more strongly by the citizen. In the majority of cases of this year's research, this has translated to heightened frustration with wait times, especially as citizens have no influence on how long they are required to wait.

However, this situation presents a great opportunity for healthcare providers. In the same way inconveniences are felt strongly, when providers do everything they can to limit the physical or emotional effort a citizen is required to expend, these positive experiences become memorable and are likely to be repaid with lifelong advocacy. This is reflected in this year's feedback where some citizens provided highly emotive positive responses as a result of their healthcare provider going above and beyond to ensure their experience was frictionless.

Leading organisations are focused on removing the physical and emotional effort for citizens, for example; Pharmacy 2U, this year's customer experience leader, do everything to remove the stress and anxiety of remembering to order prescriptions, monitoring usage, and ensuring exactly the right prescriptions is dispensed every time.





Going to the hospital means you have to **sacrifice more than 8 hours** of your day in the waiting room."



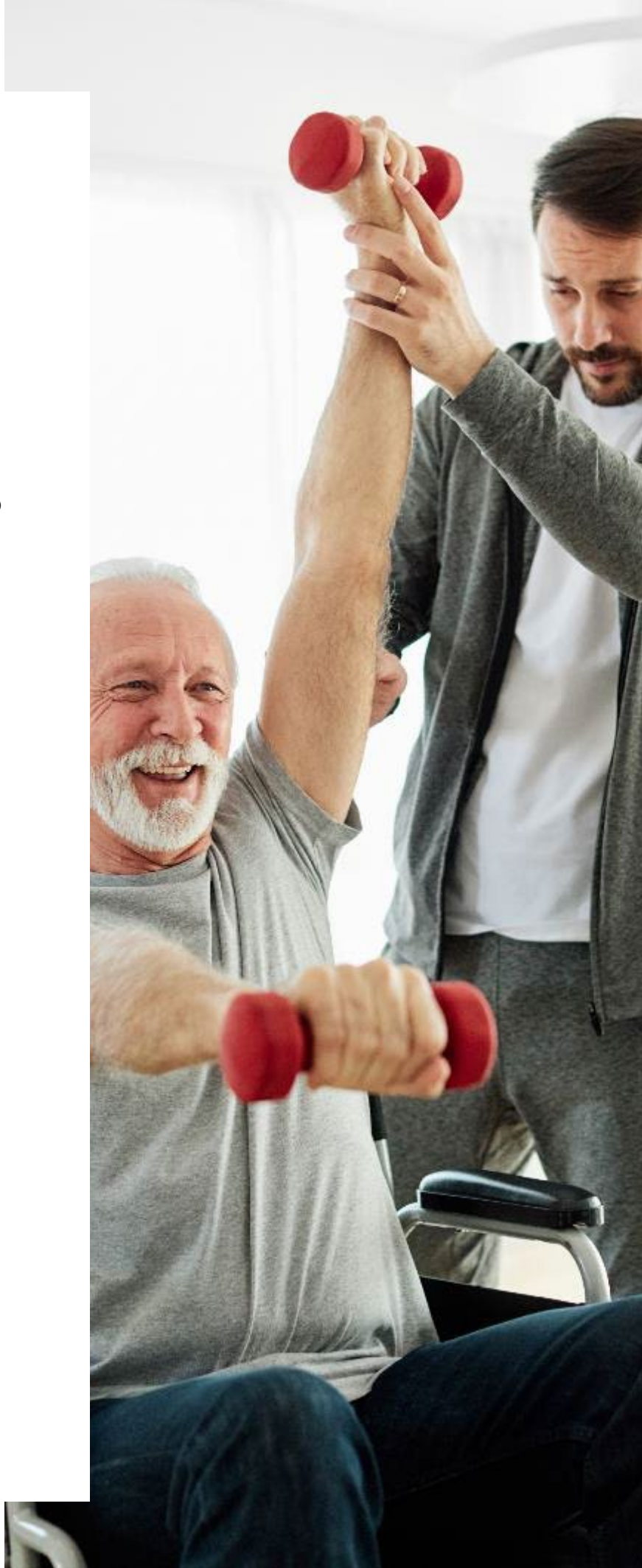
The amount of times I have gone to an outpatient emergency care, **waited 8 hours** and was **sent home without being seen.**"



They refused to see me at my local GP surgery, instead **sending me miles away** to Wales for an appointment weeks later, only for that hospital to **send me back to my GP.**"



Waited 12 hours in A&E to see a doctor who said I needed to be admitted to SAU. This is what the ambulance paramedics said before arriving at hospital. It **would have saved everyone a lot of trouble** if A&E had listened to the paramedics."



Cornwall and the Isles of Scilly (CIOS) Integrated Care System

NHS organisations must co-design clinical pathways with the citizens they serve to become truly clinically led and citizen focused.

One of the key issues the Citizen Experience Excellence research has shown CIOS is that there is a key issue around how the system views citizens versus how the citizens see themselves. In the present, CIOS comes up with a clinical pathway and then engages the citizen for their feedback, and therefore service design is not citizen-led. To change, CIOS are reflecting on whether they are truly listening to citizens needs, in particular understanding how citizens choose to engage with the NHS for prevention information and clinical solutions.

One of the national NHS priorities is to focus on healthcare delivery in the community and CIOS have recognised that many of their clinical pathways could be delivered at a community level, however the question remains as to how much services should be designed centrally, versus empowering clinicians and practitioners to design services locally? Health inequalities add an extra layer of complexity, whereby service design must be done at a local level in order to take into account potentially different needs of one community compared to the next. For CIOS, the solution is to challenge how service design is currently engineered, and adopt a true citizen led approach, through the creation of personas and the design of future state end-to-end journey maps.




Advocacy is at the heart of citizen centricity, no matter how good we think we are, if we can't get the citizens of Cornwall speaking well of us, it doesn't really count for much."

John Govett, CIOS

True North Framework

Priorities and guiding principles for decision making



Put individual citizens at the heart of our service re-design

Don't just say it!

- 01** | Customer focused
- 02** | Clinically led
- 03** | Evidence based
- 04** | Within financial constraints
- 05** | Targets health inequalities
- 06** | Place based

Section 4

Key Takeaways

In the following section, we will address the following questions:

- How can the NHS address the challenges it faces to become truly citizen-centric and achieve more with less?





Key Takeaways



NHS organisations must invest in understanding the root causes of citizen dissatisfaction, and foster a culture of collaboration across the healthcare system to take a system-wide approach to digital transformation.

01 The gap is increasing between high citizen expectations and the way in which a healthcare service is actually delivered

The halo effect is wearing off for the NHS as the challenges it's currently facing creep into all parts of the system,, exposing the chronic underfunded and under-resourced service, this is impacting citizen empathy and tolerance for poor service, missed expectations are no longer acceptable. Although the respect and appreciation for NHS's great people prevails, these issues will increasingly overshadow, what is clearly their greatest asset

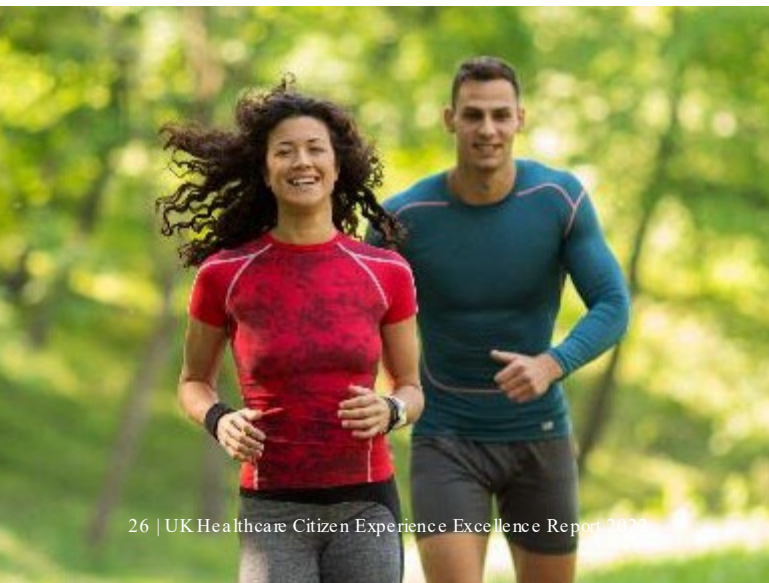
To move forward, investment in understanding the root causes of citizen dissatisfaction is crucial in closing the gap between expectations and actual delivery. When the focus is to provide great citizen experiences despite the pressure the NHS is under, focusing on what matters most to citizens will ensure services are delivered in the right care setting, at the right time for the individual. Through providing services on the terms of citizen, the NHS can not only deliver on citizen needs, but reduce situations where citizens use multiple care settings and resources to achieve resolution.



02 Digital transformation must be citizen-led for long term sustainability

The industry has made great progress with digital transformation in the short term, but when innovation is rushed and does not take citizen experience into account, it becomes unsustainable in the long term. This is evidenced by many citizens now calling for health services to return to face to face post the pandemic, due to the lack of compassion they receive through digital services. Digital services must be citizen-led in both design and delivery to alter the perception that digital services are inferior to face to face alternatives.

Great innovations currently exist in isolated pockets of the NHS, but these must be scaled and connected to the wider system to deliver sustainable digital transformation. This can be achieved through fostering a culture of collaboration across the system and taking a system-wide approach to digital transformation, ensuring that all stakeholders are bought into digital first and bringing a level of consistency to the digital experience a citizen receives across providers.



03 Citizen self-service will drive improved citizen experience

With wait times and accessibility issues becoming more and more poignant in a citizens experience, healthcare organisations must prioritise empowering citizens to self-serve. The benefits of this are two fold, reducing the waiting list back-log but also improving the health outcomes of citizens who are waiting through avoiding the deterioration of health conditions.

Empowering the citizen to take control over their own care and wellbeing can only be achieved through a deep understanding of citizen needs and insight driven root cause analysis, whereby the biggest pain points in a population or waiting experience are identified and interventions are tailored to fixing these pain points. Through providing self-service solutions to the greatest pain points, healthcare resources can be prioritised for the citizens who need them most.

04 Workforce empowerment, using digital as an enabler is key for driving great experiences

The NHS workforce is undoubtedly the NHS's greatest asset in providing great citizen experiences, however the immense pressure from lack of investment is starting to catch up and limiting the quality of experience the workforce provides.

Healthcare leaders must continue to invest in their existing people, providing them with the capabilities and using digital transformation to remove unnecessary and time wasting processes, enabling them to perform their job to the best of their ability and meet citizen expectations. Where there are skill gaps in the existing workforce, these must be plugged through recruiting the right people with the right skills.

NHS organisations must prioritise self-service solutions to tackle the greatest pain points for citizens. Furthermore, NHS leaders must empower their great people with the tools and capabilities to do their job to the best of their ability.

05 PHM and preventative models of care must be at the forefront in order to achieve more with less

Achieving more with less means providing greater value to citizens, whether that be in the form of an improved citizen experience or an improved health outcome, whilst maximising productivity of existing resources to manage operational cost pressures. Preventative models of care provide an answer to this whereby citizens take control of their own health, reducing the need for complex interactions with the healthcare system and therefore reducing the resources required to manage these interactions.

However, for preventative models of care to succeed, citizen experience and behaviour must be measured alongside operational data, in order to understand what matters to citizens, how healthcare behaviours can be changed, and how best to deliver PHM interventions.



Section 5

How KPMG can help

In the following section, we will address the following questions:

- How can KPMG help NHS organisations to become citizen-centric, taking strides on their journey to achieving more with less?

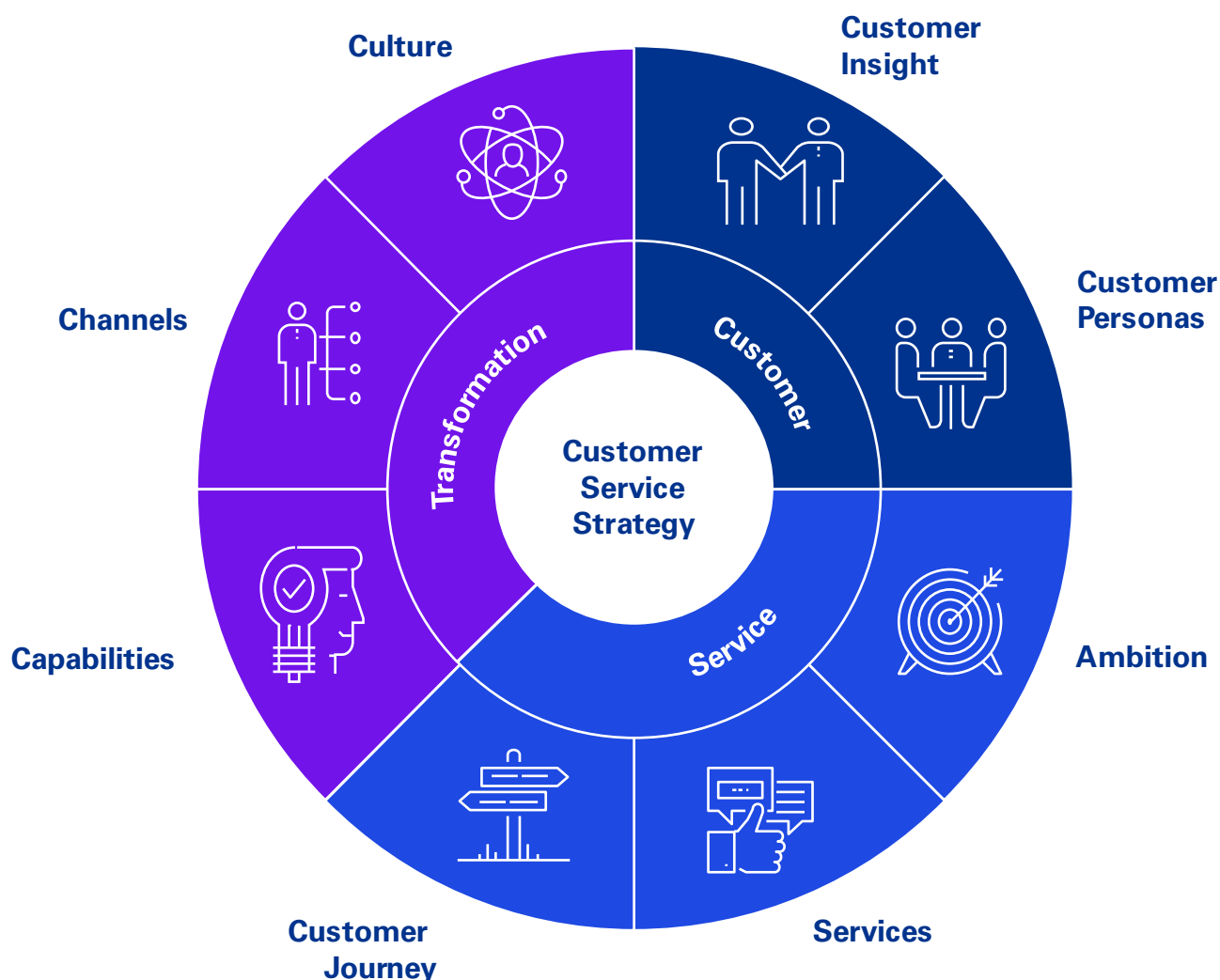




Citizen-led, digitally enabled transformation

Citizen-led, digitally enabled transformation requires a citizen-centric strategy which is informed by deep insight into citizen experiences and underpinned by a citizen-centric culture.

Starting by understanding who the users of your services are, what are their needs and what makes them different will help get one step further to being able to design services around the people that will adopt them. Starting with Insight unlocks the rest of the journey needed to deliver truly citizen centric care



Who: Customer	 Customer Insight	Segmenting & understanding the customer population through insight
	 Customer Personas	Developing customer personas
What: Service	 Ambition	The future vision (true north) and design principles that drive future decision making
	 Services	The core services and support provided to customers
	 Customer Journey	Stages / sections of the end-to-end journey of customers
How: Transformation	 Capabilities	How the targeted experience gets delivered
	 Channels	The channels through which the customer engages with / accesses services (for any given touchpoint across the journey)
	 Culture	Identity, culture and purpose – what leadership, colleague experience, tools and measurement are needed

Contact us if you want to become a citizen leader

Reach out to our public sector citizen experience and healthcare experts if you want to insight real change and turn the dial in next years results.



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