



Embrace your digital citizen

Patient Experience Excellence 2023 – 24

KPMG. Shaping Citizens' Futures, Together.





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What is Patient Experience Excellence?

This research is part of the world's largest benchmark of experience excellence, defining what good looks like in every human and digital interaction across our KPMG Six Pillars of Patient Experience.

Patient experience excellence

Navigating the balance between cutting costs, enhancing service delivery with new tech like Artificial Intelligence (AI), whilst still maintaining citizen trust, is a formidable challenge for the UK Government and public sector.

Our research this year on public sector Patient Experience Excellence, shows that while progress is happening, government services are still designed and optimised in separate silos rather than around citizens' holistic needs, significantly impacting satisfaction.

Increasing numbers of respondents are unhappy with being able to find information and navigate government services smoothly, leading to an 12% drop in satisfaction from 2021 to 2023.

For the first time, satisfaction with digital interactions is higher than with human contact channels. But digital improvements have primarily occurred for specific departments, products, or services, leading to inconsistent and fragmented experiences. This approach falls short for digital citizens who want seamless journeys tailored to their individual circumstances and needs.

This dissatisfaction underlines the need for a radical reshaping of the relationship between citizens and public services. Services work best when they're built around people's needs, not just on the organisations providing them.

This means a major shift in how services are designed and delivered. We need to constantly improve services to meet the changing expectations of today's digital citizens.

The experience of the UK healthcare system is based on the responses of 10,700 citizens

This year, the research revealed 3 key themes which healthcare organisations must focus on to close the gap

Balance reducing costs with service delivery



Resolution has the greatest impact on increased satisfaction, causing an increase of **8%** when done well

However, 44% of patients could not achieve first contact resolution, decreasing satisfaction by **15%**

Resolution failure in traditional channels is 42% compared to **35%** for digital channels

34% of patients are not receiving the value they need from public health and care organisations due to misaligned priorities

Embrace new technology to enhance delivery



4% increase in satisfaction when patients use digital channels

However, patients still use slow, high cost channels over **37%** of the time

5% better experience when interacting via app than over the phone for those over the age of 55

3% increase in empathy when patients interacted using digital channels (compared to traditional channels)

Understand what matters most to build trust



87% of patients are confident that their data is secure

28% said that the health and care organisation did not act in their best interests, decreasing satisfaction by 22%

35% of patients are not clear where they are in the process when using health and care services

39% of patients said they were not proactively informed and kept up-to-date. When this was the case, satisfaction fell by 18%

The Six Pillars of experience

We evaluate citizens' interaction with government and public sector organisations across The Six Pillars of experience. Our ongoing research has shown that these are the essential building blocks of world class experiences. Organisations worldwide are using The Six Pillars to guide strategy development and provide design principles for their customer experiences.

We'll be referring back to The Six Pillars throughout this report.



Integrity

Being trustworthy and engendering trust



I was served by a very helpful member of staff who was very informative and made me feel very comfortable, secure, relaxed."



Resolution

Turning a poor experience into a great one



My purse was recently stolen, which had my driver's licence in it, among many other items. The DVLA process for getting a new one was astonishingly quick – in fact it turned up before any of my credit/bank cards!"



Expectations

Managing, meeting and exceeding customer expectations



I always get an email from the council with various updates on what is going on. I often click the links for further information."



Time and Effort

Minimising customer effort and creating frictionless processes



I went on their website and, although there were a lot of different portals for different departments, it was quite easy to find what I was looking for and I was able to pay what I needed and was emailed a receipt."



Personalisation

Using individualised attention to drive an emotional connection



The Council had aligned the discounted Clean Air programme to run concurrently with my Disability Blue Badge application. This means that the future process will be seamless. They have obviously thought carefully about what is best for this particular community."



Empathy

Achieving an understanding of the customer's circumstances to drive deep rapport



The response from staff is very professional and polite, and they are always willing to help in any way they can."

Healthcare deep-dive

Citizen satisfaction with the NHS has fallen by 12% from 2021 to 2023, more so than any other public sector organisation. The latest British Social Attitudes survey evidences this, reporting the lowest satisfaction scores recorded since the survey began.

Several key factors are influencing this decline, including the fading of the COVID-19 Halo Effect, decreasing access to healthcare services, and negative national news headlines. Ongoing pay disputes have also led to regular strikes and disruption to services.

It is estimated that every person in England has been impacted by increasing elective wait times, either personally or through a loved one.

At the same time, a mixture of rising demand for healthcare services and budget cuts are increasing operational pressures.

The time to act is now. The considerations that healthcare departments should focus on are:

Cost and value

Healthcare delivery channels are undergoing transformative shifts. While face-to-face interactions remain vital, the preference for digital platforms is increasingly apparent among citizens seeking care. Surprisingly, some of the most positive care encounters are now happening through digital mediums.

However, traditional channels such as phone calls, video calls, and emails, often result in less satisfactory experiences for users.

This contrast highlights a significant opportunity to improve satisfaction, particularly considering the significant costs associated with conventional channels.

Mental health services are a compelling illustration of this. Our research highlights that 36% of respondents in this domain opted for digital channels such as websites, apps, and chatbots – and, remarkably, they reported a 6% higher satisfaction rate compared to those who utilised phone, email, or video call services.

Technology

The evidence suggests that NHS bodies often fail to recognise the potential for technology to improve not only clinical effectiveness or operational efficiency, but also the citizen experience. According to our Forrester research findings, a mere 42% of healthcare decision-makers³ view the development of citizen-centric services as a primary impetus for their digital transformation endeavours.

In contrast, 63% prioritise operational efficiency, indicating a prevailing emphasis on streamlining processes, rather than placing citizens at the forefront of technology-led service enhancement efforts.

12% Satisfaction decrease
(2021 – 2023)

Trust

While health digitalisation holds significant promise, it is not a panacea for all challenges. Our research underscores citizen trust as a critical concern. As expectations regarding care delivery continue to grow, many individuals now anticipate a level of service on a par with the private sector offering.

Despite acknowledging the strains the NHS faces, citizens increasingly feel disillusioned when their expectations are not met and managed effectively, particularly concerning access to care services. This shortfall erodes trust in the system. Consequently, some citizens find themselves compelled to take a proactive role in seeking their own care or resorting to utilising personal savings to finance private treatment.

³ Source: a commissioned study conducted by Forrester Consulting on behalf of KPMG, October 2023

Take an 'outside-in' approach

Many departments have to date taken an 'inside-out' approach to digitalisation. They've created tools that are designed to make their own lives easier and save money. The emergence of the 'digital citizen' – who is willing and able to self-serve – means this needs to be balanced with an 'outside-in' view.

What does 'outside-in' thinking look like?

To help bring that to life, let's follow two people in different stages of life and see how digital services could improve their experiences. In both cases, digital public services help to alleviate anxiety and dissatisfaction by providing tailored support and resources. They give them quick access to all information and tools they need, empowering individuals to navigate important life transitions more effectively.

Empowering a 66-year-old about to retire:

Anika



"I am 66 years old, living on my own and about to go into retirement. I am anxious and find it difficult to get the services I need; I don't understand why I have to tell different departments the same thing time and time again. I have life-long disabilities and, although I wouldn't say I am up to speed with new technology, I do use my mobile phone and computer to make sure I stay in touch with my grandchildren."

Assisting a 26-year-old transitioning to independent living:

Noah



"After graduating from a local university a few years ago, I carried on living with my parents to save for a house deposit. I just landed a great new job at a technology start-up which means I can finally buy my own place. I have suffered from mental health issues in the past, so it is nerve-wracking moving to a new area and having to contact and use new public services. I don't know how I will manage everything myself whilst balancing the pressure of my new job."

Cost and value

What can organisations do?



Treat any contact with the organisation as an opportunity to engage meaningfully and create insight. Deal with issues and complaints consistently and own the resolution and fix with urgency. Utilise digital technology to improve first contact resolution for colleagues as well as online.



Bringing data together to avoid patients having to repeat information can improve satisfaction by 13%. Use digital technology to reduce pressure on staff and enable a better, more patient-centric working environment.



Create personalised digital care experiences to reduce the need for patients to contact organisations due to 'just needing to speak to someone'.

What does this feel like for citizens?



Anika:

"My biggest concern going into retirement was being able to access the support I need for my disability, especially if my mobility declines. However, I recently had my first video call with my GP and they introduced me to an online patient portal that I did not know existed! The best bit about it is that I can access personalised guidance and support whenever I need it from my own home; all in a few minutes using my mobile phone. Since discovering the portal, I have been able to take charge of my own health, proactively engaging with the NHS as and when I need it, rather than bothering my community nurse."



Noah:

"One of my biggest reservations about moving house was the time and effort it would take to find new mental health support services. I had developed a great relationship with my previous support contact and was anxious that I would not be able to feel that comfortable again. However, the mental health services in my new area have exceeded my expectations. They have set up an online community of people who have suffered or are suffering with mental health problems. The community has really made me feel at home and regularly connecting virtually with others similar to me has greatly reduced my anxiety."

Client insight:

Berkshire Healthcare NHS Foundation Trust have introduced 'Rio mood diary' to their patients. This is a digital version of the Mood Diary, within an app, designed to support a patient's wellbeing.

Patients download it on their mobile phones and use it to record their mood using emojis to register an initial level of happiness, before recording reasons for their mood.

The app communicates with clinicians and integrates with Rio EPR (electronic patient records) to provide an easy-to-follow history of a patient's mood.

This app enables patients to quickly view important details and safeguards without relying on mental health care professionals, having access to information outside of appointment times.

Technology

What can organisations do?



Personalisation

Harness data and analytics technology to provide patients with the information that's contextually right for them so they can self-serve. Better understand the patient circumstances and use this to design end-to-end solutions that guide patients along their health and care journeys.



Empathy

Utilise new GenAI capabilities to enable patients to engage with the health and care organisation on their terms and in a way that is natural to them. Define the tone of voice and persona archetype of your GenAI enabled chatbot to forge an emotional connection with patients.



Time and Effort

Create a single entry point to redesign services and experiences through the eyes of the patient to simplify interactions and reduce cognitive load.

What does this feel like for citizens?



Anika:

"As my mobility has deteriorated, I have started taking new medications to help with the pain. At first it was so confusing how to order prescriptions and which medications did what. I felt lost in a system which is supposed to put me first. However, since setting up my account on the NHS App it has become so much clearer. I can manage all my prescriptions in one place, from describing my needs right to delivery. The App even has a voice enabled feature which describes how to take my medication. This makes it so much easier for me to understand"



Noah:

"Due to my busy lifestyle, my preferences have always been to have virtual appointments with my GP. The problem in my previous area was that it was so hard to book virtual appointments on the website so I just ended up attending in person. However, I have been so impressed with my new local NHS Trust; the website is user friendly and it is so easy to select a time slot that suits me for a virtual appointment. When appointments are not available there is an option to use the website chatbot which in most cases provides the information I need to manage my own health. Sometimes I forget it's a chatbot on the other end!"

Client insight:



It's essential that you have a genuine ethos of customer service embedded in the organisation. Get the basics of proper user research and user-centred design right. Structure your services around the citizen – not the organisation delivering them. Build the customer ethos, and support your staff too. When staff engagement rises, so does citizen satisfaction. That's no coincidence – there's a direct link between the two."

Matti Raudsepp

Director of Customer, Arts & Property Operations, Bournemouth Christchurch and Poole Council

Trust

What can organisations do?

Expectations

Define the care services you deliver, the steps in the patient journey, and communicate clearly what these are and what is expected at each stage. Provide visual signposting of the journey stage reached and what lies ahead. Proactively prompt patients for information needed to move to the next stage in a digital process.

Integrity

Invest in building the foundations of integrity, starting with cyber and technology transformation. Getting this right provides a platform for integrity to develop, as without it, investment can be undone in one incident.

What does this feel like for citizens?



Anika:

"Isolation is perhaps the scariest part of my retirement. I was so concerned that I would not be able to access urgent care if I needed it. However, my local NHS Trust has provided me with a wearable device which alerts my support worker should anything serious happen. The Trust walked me through how my data would be used to keep me safe which provided comfort to my minor reservations. This whole process has made me trust that they will be there for me in my time of need. This helps me live well without the anxiety of isolation."



Noah:

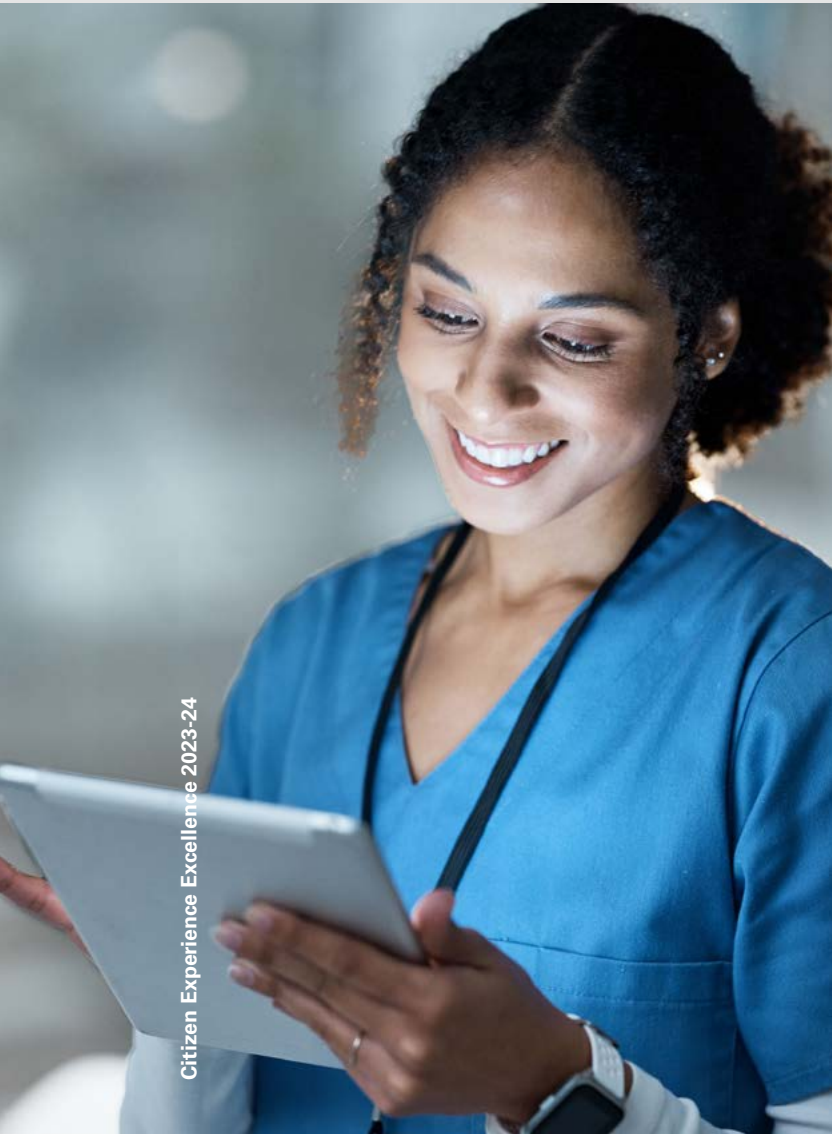
"I trusted all of the healthcare services in my previous hometown and am hoping I can have the same in my new place. So far they have been brilliant, always proactively keeping me up to date after any interaction. However, what has stood out for me is how the local Trust engages with the local community. They use a variety of channels, including social media, to update us on key decisions and actions we can take to improve our health. The transparency and demonstrative care makes me think they have mine and the communities best interests at heart."

Providing high quality basic care and health management

Ping An Good Doctor aimed to remove the part of unwarranted demand from overcrowded large hospitals by launching an internet healthcare platform to provide primary care services

The company recruited a full-time in-house doctors' team of high qualifications to provide 24x7 online consultations, and partnered with other healthcare players to build a "closed-loop" system of healthcare services with fast delivery of medicine to patients' doorsteps and convenient access to partnered clinics and labs.

This has allowed medical resources to address market demand more effectively while lowering social costs.



Case study:

Singapore General Hospital

Singapore General Hospital (SGH) demonstrated significant advancements in our Citizen Experience Excellence rankings, rising 48 places to secure 5th spot in the Singapore market. This achievement stemmed from strategic investments in technology, building patient trust, and implementing cost-effective measures.

SGH implemented Robotic Process Automation to collect Patient-Reported Outcome Measures (PROMs), resulting in substantial time savings of 1,350 hours over 10 months and significant cost reductions. Additionally, efficient management of patient appointments led to shorter waiting times, contributing to an impressive Time and Effort score of 7.67, surpassing the industry average of 7.10.

Moreover, SGH cultivated a strong emotional connection with Singaporeans by leveraging familiarity and shared history across generations, enhancing trust in healthcare services.

“

Role model the change you want to see. If everyone puts the patient or citizen first in all that they do, that's going to have a huge cumulative effect. Beyond that, I always come back to the key importance of accessing the patient voice. It's essential we know what their experience is actually like if we're going to address the blockers and pain points. Our mantra in every meeting is, 'Where's the patient in this?'. If you keep that firmly in view, and create an evidence base around the lived experience, you will be able to build a prioritised programme for improvement.”

Cora McKeown

Senior Transformation Stakeholder Lead,
New Hospital Programme, NHS England



Priority actions

Healthcare organisations should prioritise enhancing three key attributes to improve citizen experiences:

- ✓ **Staff going the extra mile:** This entails resolving issues with a proactive attitude, resulting in a remarkable increase of 13% in satisfaction.
- ✓ **Getting citizens to the right place at the first attempt:** Streamlining processes to ensure citizens can access the appropriate care immediately saves time and effort, evidenced in our research by a 12% improvement.
- ✓ **Being proactive in keeping citizens up to date:** Keeping citizens informed and engaged throughout their healthcare journey contributes to the better management of expectations, leading to a 12% boost in satisfaction.

To achieve substantial improvements across these attributes, we recommend three interventions:

- 🔦 **Resolution. Invest in citizen capability:** Equipping NHS staff with the necessary skills to design and deliver citizen-centric care fosters proactive improvements and enhances satisfaction.
- 🕒 **Time and Effort. Obtain richer citizen insights and combine them with population health intelligence:** By leveraging data analytics, healthcare organisations can identify areas for improvement, particularly focusing on first contact resolution and reducing wait times.
- 📌 **Expectations. Develop a patient portal:** Offering a platform for individuals to track their healthcare journey promotes better expectation management and engagement.

Contact us

We bring all three levels together, while wrapping our cultural and learning expertise around it, to ensure design is simple, cohesive, and implementable.

International leading practice, supported by a rich library of assets, fronted by teams that know how to apply them in practice, are readily available locally to support applying this across the organisation. Taking organisations from vision to tangible outcomes.

If you want to better embrace your 'digital citizen' using a connected approach, please contact one of our KPMG team.



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