



What Matters Most to Cancer Patients

Nine insights from our Cancer Patient Experience Survey

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In a world of tightening budgets and increasing competition, you need to exceed cancer patients' expectations—both to attract them to your program and to retain them throughout their treatment.

But what exactly are cancer patients looking for?

And how should that impact your marketing and investment strategy?

To help answer these questions, we surveyed over

1,200

cancer patients diagnosed in the last five years **about what is most important to them.**

Using questions that rely on traditional and MaxDiff methodology, we surveyed patients to understand how they choose oncology providers and what matters most to them across their experience with cancer.

WE ASKED TWO KEY QUESTIONS:

1 What matters most to patients when selecting a cancer provider?

For the first MaxDiff question, we asked respondents, “When deciding where to go for cancer care, which factor is most important to you and which is least important to you?” The survey tested preferences for 15 provider attributes.

2 Which services are most valuable to patients across their experience with cancer?

For the second MaxDiff question, we asked, “Thinking about your most recent experience, which service provided by a cancer center would have been the most valuable to you and which would have been the least valuable to you?” The survey tested preferences for 19 different features and services.

We also asked patients a number of demographic, behavioral, and decision-making questions, including:

- How did you decide where to go for your treatment?
- Which of the following resources did you use when deciding where to go for your cancer care?
- What is your preferred level of control when making decisions about your cancer treatment?



MAXDIFF AT A GLANCE:

Unlike other surveys that allow participants to rate all items as “important,” we used MaxDiff methodology, otherwise known as best-worse scaling. Respondents were shown multiple screens of five attributes, from which they chose the “most important” and “least important” attribute. Each attribute was presented multiple times, resulting in a rank list of utility scores indicating the relative value of each attribute.

Top 9 insights from our Cancer Patient Experience Survey

How do cancer patients choose a provider?

1. Clinical excellence is (still) king.
2. Physician referrals are the foundation of your business.
3. Don't underestimate the power of the internet.
4. Most patients can't afford to ignore costs.

What matters most to patients across their experience with cancer?

5. Don't make cancer any harder to deal with.
6. Patients want their questions answered—now.
7. Not all complementary medicine is created equal.

What drives loyalty to a cancer provider?

8. Patients will leave you if their expectations aren't met.
9. The patient experience doesn't end when treatment stops.

How do cancer patients choose a provider?

Cancer programs are facing a new environment. Patients can easily access information on treatments and research different providers. Understanding what patients are looking for in a provider and how they find that information is critical for attracting them to your program.

INSIGHT 1

Clinical excellence is (still) king.

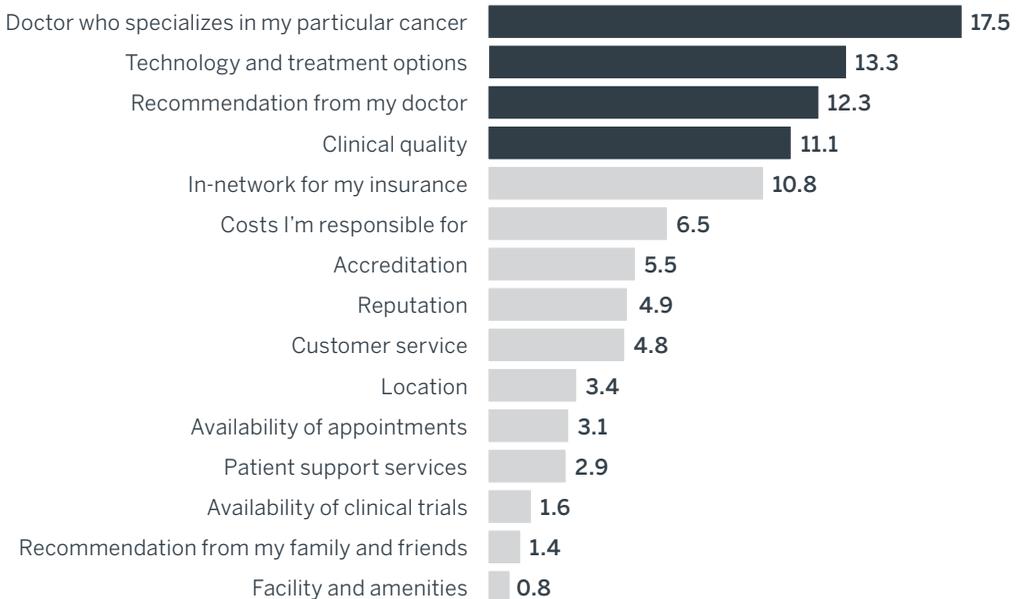
When choosing where to go for care, cancer patients are looking for top-notch quality above all else. But it's difficult to define quality in a meaningful way, especially in oncology. Patients are looking for specialized physicians, access to the latest technology and treatments, endorsements from physicians they trust, and meaningful data.

However, this doesn't mean other provider attributes don't matter. Less than 1% of respondents ranked "facility and amenities" in their top five most important features—but that's only because a clean, inviting facility is now a baseline expectation. This may not be enough to attract patients to your organization, but it will be enough to drive them away if their expectations are not met.

When deciding where to go for care, which features are most and least important?

Mean utility scores

n=1,201

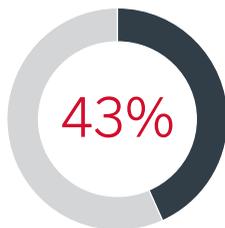


Did you know?

"Doctor who specializes in my particular cancer" ranked as the most important factor in both our 2015 and 2019 surveys. In 2015, 43% of patients ranked it #1. In 2019, that increased to 52%.

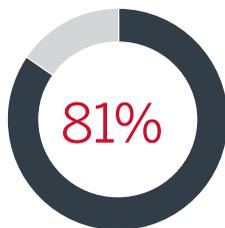
Physician referrals are the foundation of your business.

Information on health care providers is ubiquitous, but cancer patients still highly value their doctor's opinion on where to go for care.



Of patients cited "recommendation from my doctor" as a top 3 feature when selecting a provider

Furthermore, we asked respondents which resources they used when deciding where to go for their cancer care. The clear winner was "my doctor." One of the first questions patients ask their provider upon receiving a diagnosis of cancer is: "Where would you go?"



Of patients consulted their doctor when deciding where to go for care

And, more than likely, patients will follow through on their physicians' guidance.

How did you decide where to go for your treatment?

I got a recommendation from my doctor and I followed it



Surgery
90%



Chemotherapy
85%



Radiation
91%



You can't overestimate the importance of your relationships with referring providers.

Make sure you know what referring physicians are looking for in a cancer provider, such as easy access, timely follow-up, or cost-effective care. Communicate how your strengths meet their needs and follow through on the promises you make.

INSIGHT 3

Don't underestimate the power of the **internet**.

Referrals are a critical starting point of a patient's journey to choosing a cancer program. But many patients then turn to the internet to perform research of their own. And for older patients, it's often their children and grandchildren who are researching options.



48%

Of patients looked online for information when deciding where to go for care



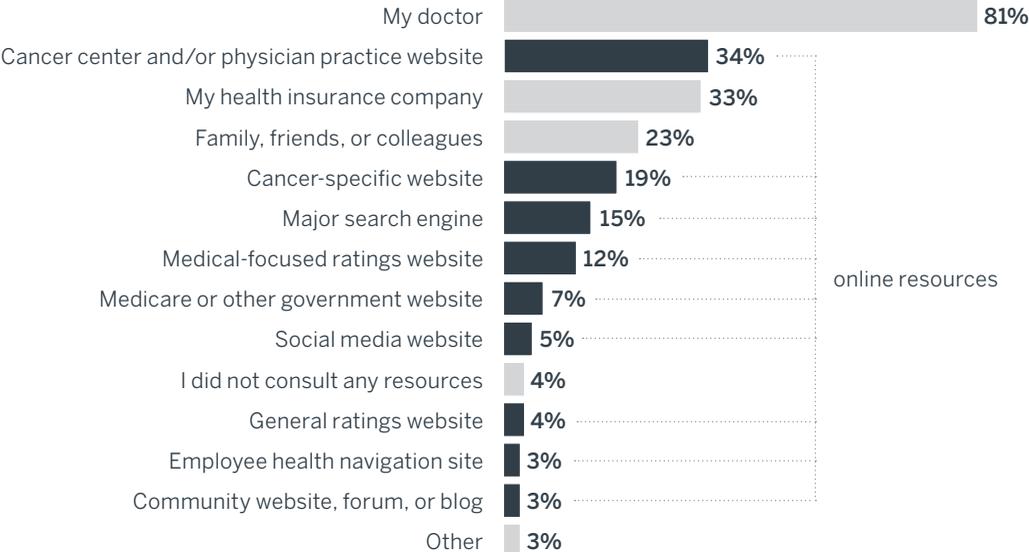
2.1

Average number of online resources patients consulted when deciding where to go for care

Patients today have access to an overwhelming amount of information online—from Google to WebMD to Facebook. But the online resource patients checked most often was a cancer center or physician's website. With limited resources, you need to make sure you get the biggest bang for your buck. Focus on making your cancer center's website easy to find and navigate. Rest assured, you can put less effort into your social media presence—for now.

Which of the following resources did you use when deciding where to go for your cancer care?

n=1,201



Most patients can't afford to ignore **costs**.

The increased scrutiny on the costs of cancer treatment and growing awareness of financial toxicity are influencing patients' priorities when deciding where to go for care.



57%

Of patients ranked **"in network for my insurance"** as a top 5 feature when deciding where to go for care

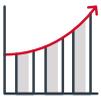


31%

Of patients ranked **"costs I'm responsible for"** as a top 5 feature when deciding where to go for care

Sadly, the average cancer patient has to consider costs.

In fact, a recent study estimated that over 42% of cancer patients deplete their entire life's assets after diagnosis. Cancer programs need to make sure they're helping patients understand their health benefits and, if appropriate, connect them to resources to help them manage the costs of their care. Not only can this help reduce bad debt for the organization, but it can also have an outsized impact on patient outcomes and quality of life.



2.65x

More likely cancer patients are to declare bankruptcy than people without cancer



79%

Greater risk of mortality for cancer patients who have declared bankruptcy compared to those who do not

What matters most to patients across their experience with cancer?

Cancer programs face a number of “unfunded mandates”—from navigation to survivorship and beyond. But understanding what patients value most from their provider is essential for knowing where and how to spend limited resources.

INSIGHT 5

Don't make cancer any harder to deal with.

Receiving a cancer diagnosis is a life-changing event. While coping with the physical and emotional toll of their disease, patients don't want to have to deal with the added stress of traveling between far-flung facilities or coordinating the complex logistics of their care.

The four services that cancer patients care most about all relate to convenience and coordination. Overall, patients place the most value on specialized symptom management. In fact, 71% of respondents ranked it as one of their top five features. Right behind this was "all of my care takes place in one location," with 67% of respondents ranking it in their top five.

Across your experience with cancer, which service would have been most valuable and least valuable to you?

Mean utility scores

n=1,201



INSIGHT 6

Patients want their questions answered—now.

Patients don't just want convenient and coordinated care, they also want on-demand support. And that makes sense. Patients interact with multiple providers, have unexpected complications, and—too often—don't know where to turn for help.

OUT OF THE 19 SERVICES WE ASKED RESPONDENTS TO PRIORITIZE...

56% selected "one person to answer my questions and help me understand my care"

38% selected "an online portal to view test results and contact my care team"

26% selected "a phone line to talk with a nurse about my symptoms and questions"

...IN THEIR TOP 5

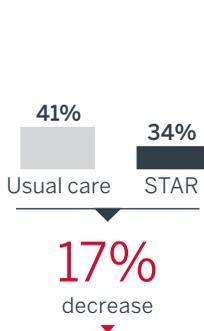
Getting their symptom-related questions answered quickly is certainly top of mind for patients as both specialized symptom management and nurse phone line for help with symptoms ranked highly. This aligns with providers' efforts to better manage patients' urgent needs, particularly as many providers explore remote symptom monitoring as a way to decrease utilization and improve patient outcomes.



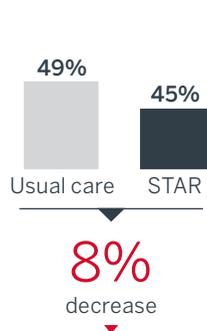
Memorial Sloan Kettering's STAR study design: Advanced solid tumor patients receiving chemotherapy were randomized to regularly report 12 common symptoms using the web-based Symptom Tracking and Reporting (STAR) platform or to receive usual care consisting of symptom management at the discretion of clinicians

STAR intervention results

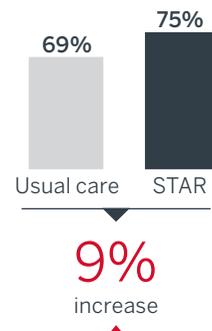
Percentage of cancer patients visiting the ED across one year



Percentage of cancer patients hospitalized across one year



Percentage of cancer patients alive at one year



Not all **complementary medicine** is created equal.

Cancer patients use complementary medicine significantly more than the general patient population. So it's not surprising that 60% of cancer programs we surveyed in 2017 offered at least one type of these services.

Of those cancer programs...



77%

Offer exercise therapies
(e.g., tai chi, yoga)



57%

Offer mind-body interventions
(e.g., meditation, hypnosis)



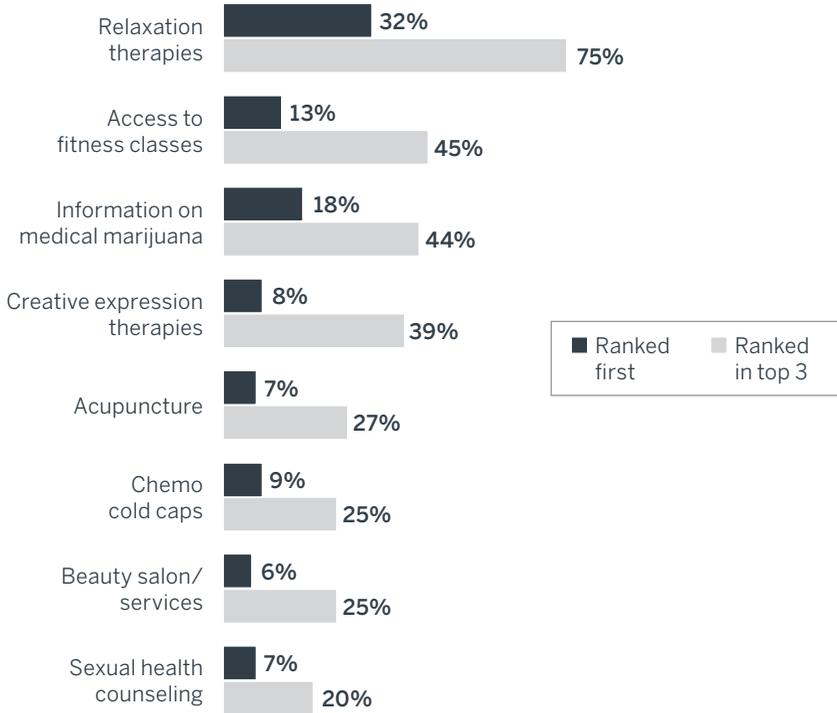
36%

Offer energy therapies
(e.g., reiki, magnet therapies)

But limited resources mean you need to invest in the right programs—ones that will meet patient demand and differentiate your program.

Of the complementary and support services listed below, please select the 3 that you believe would be most valuable during your experience with cancer

n=1,201



Depending on the tumor site and your local market, patient preferences may vastly differ. For example, 43% of breast cancer patients ranked “beauty salon services” in their top three preferences, compared to just 25% of all cancer patients.



Did you know?

We found less variation in patient priorities across subpopulations in 2019 compared to 2015. But you can slice and dice the data any way you want using our survey results portal available at advisory.com/or/CancerPatientExperience.

What drives loyalty to a cancer provider?

As patient expectations rise, it's not enough just to attract cancer patients to your program. To retain them and their business, you need to understand what will keep them loyal to your system.

INSIGHT 8

Patients **will leave you** if their expectations aren't met.

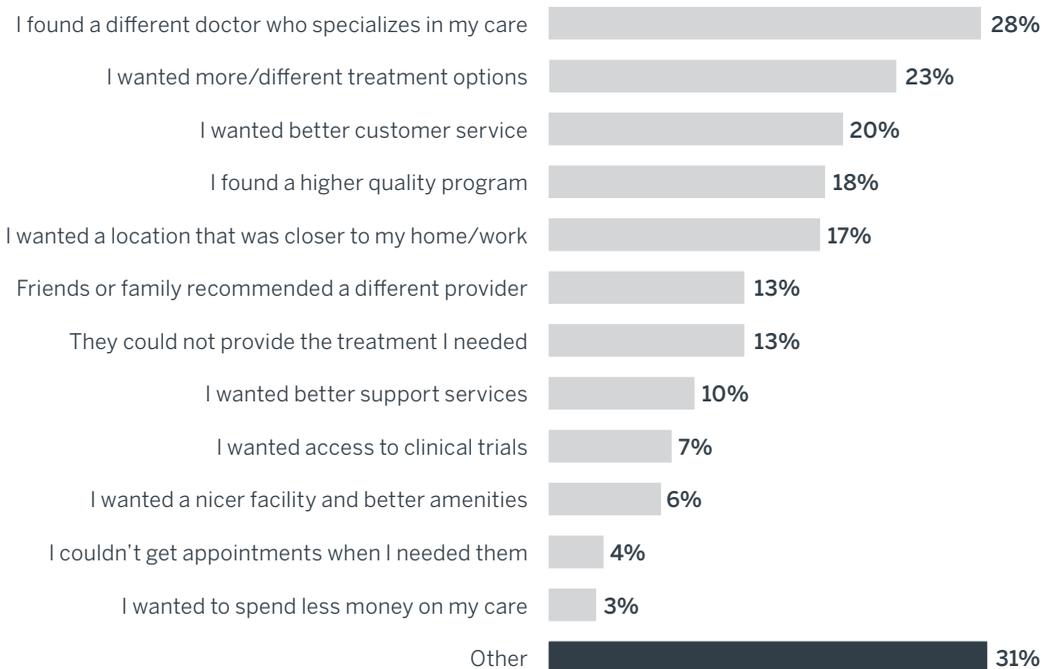
Cancer patients are still more deferential to their providers than other patient populations. But we're seeing an increasing number of patients who want to be involved in treatment decisions and who will switch programs if their needs aren't being met.

Survey respondents who changed cancer providers at some point along their journey because they were dissatisfied with their care



Why did you change cancer care providers?

n=127



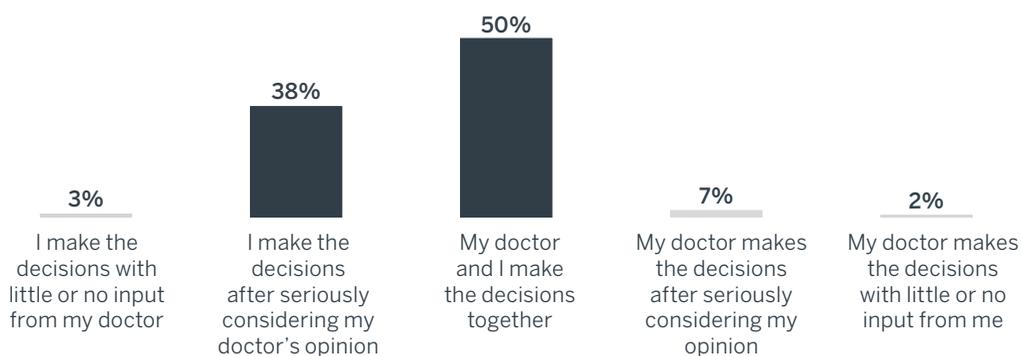
Many of the patients who selected **“other”** wrote in their reasons for changing providers, and a number of those comments cite dissatisfaction with a “doctor knows best” mindset. As one patient said,

“My doctor was distant and didn’t answer my questions, and I wanted a doctor who listened to me.”

Our survey data also demonstrate that patients are more interested in having a seat at the decision-making table.

What is your preferred level of control when making decisions about your cancer treatment?

n=1,201

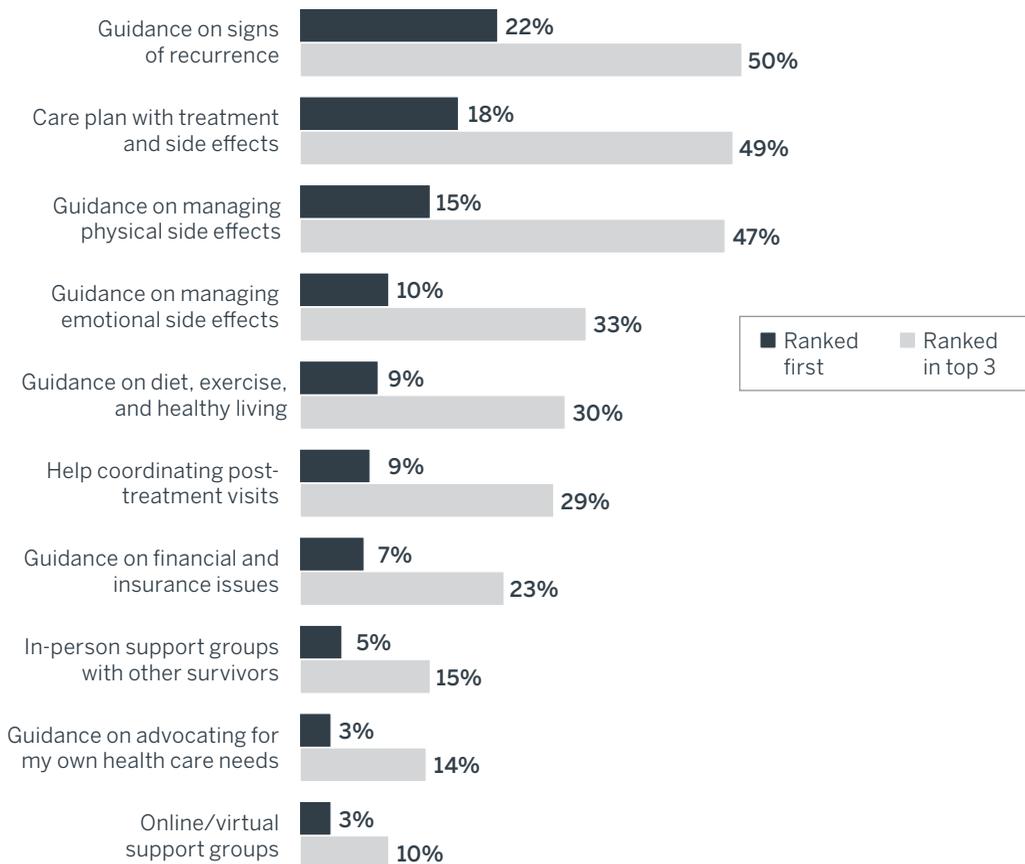


The patient experience doesn't end when treatment stops.

As early detection improves and treatments become more effective, the population of U.S. cancer survivors is growing—with estimates exceeding 20 million survivors by 2026. To meet survivors' vast and diverse needs, as well as retain their business within your system, you need to understand what they're looking for after treatment has stopped.

Many cancer centers offer survivorship care programs for patients who have completed active treatment. Which elements of a survivorship care program would you find most valuable?

n=1,201



Group visits can help programs make the most of limited survivorship resources, along with providing social support to survivors. But would patients be open to this type of visit? Surprisingly, nearly half of all cancer patients were somewhat or very interested in this option. While it might seem that this model would work best with breast cancer patients, lung cancer patients responded most favorably.

How did we explain a group visit to survey respondents?

A group visit occurs when multiple patients are seen as a group for follow-up care or management of chronic conditions in addition to meeting with their oncologist individually.

What is your level of interest in attending group visits as part of your survivorship care?

	<i>All patients (n=1,201)</i>	<i>Breast cancer patients (n=243)</i>	<i>Lung cancer patients (n=95)</i>
Not at all interested	21%	16%	21%
Not too interested	33%	34%	17%
Somewhat interested	30%	28%	33%
Very interested	17%	23%	30%

Cancer Patient Experience Survey Resources

Oncology Roundtable members have access to additional resources to better understand their patients' preferences and priorities.

- ▶ Find our survey results portal, best practices, and more at advisory.com/or/CancerPatientExperience

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The Oncology Roundtable helps cancer service line leaders run high-quality, patient-centered, and financially healthy programs.

Research

Get an in-depth look at best practices and innovative tactics to solve leaders' toughest challenges, from optimizing the infusion center business, to building out comprehensive tumor site programs, to securing referring physician and patient loyalty. All of our research is available on [advisory.com](https://www.advisory.com).

Data and analytics

Visit our suite of data and analytics tools, as well as topic-specific implementation resources, at [advisory.com/oncologytoolkit](https://www.advisory.com/oncologytoolkit) for market-specific forecasts, custom benchmarks, and detailed guidance on program development.

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