

# What Do **Cancer Patients** Care About Most?

10 Insights from the Cancer Patient Experience Survey



**Cancer patients have  
more choices for their  
care than ever before.**

To attract patients in this fiercely competitive landscape, you must invest your limited resources in the right services—ones that will attract patients and improve their experience.

To help you make the right decisions, we asked more than 600 cancer patients diagnosed within the last five years about their preferences and priorities.

# Survey Methodology

Most patient surveys allow respondents to rate all aspects of their care as “important,” making it impossible to tell which aspects patients really value the most.

For our Cancer Patient Experience Survey, we took a very different approach. We asked patients to make trade-offs among different attributes of care—a technique called “MaxDiff” that provides insight into the relative importance of each attribute.

We analyzed two key questions:

## **1** When deciding where to go for cancer care, which factor is most important to you and which is least important to you?

Respondents were shown a list of 5 features and asked to indicate the most important and least important. They answered this question 12 times, but each time they chose from a slightly different list of features.

## **2** Thinking about your most recent experience, which service provided by a cancer center would have been the most valuable to you and which service would have been the least valuable to you?

Respondents were shown a list of 5 services and asked to select the most valuable and least valuable. They answered this question 14 times, but each time they chose from a slightly different list of services.

By comparing patients’ preferences among different attributes of care, we generated “utility scores” that reflect the relative importance of each attribute. For example, our survey revealed that patients care three times more about whether a cancer center is in-network for their insurance (a 12.0 utility score) than about the convenience of its location (a 4.2 utility score).

# 10 Insights from the Cancer Patient Experience Survey

- 01 Clinical excellence truly does matter most.
- 02 Convenience is king.
- 03 Cancer patients aren't so deferential anymore.
- 04 Cost matters more than you think.
- 05 "Patient researchers" are a growing opportunity.
- 06 Age isn't just a number: younger patients really are different.
- 07 Breast cancer patients have higher expectations.
- 08 Newly diagnosed patients have unique preferences.
- 09 Priorities shift as patients move across the continuum of care.
- 10 Everything matters to someone.

# 01 Clinical excellence truly does matter most.

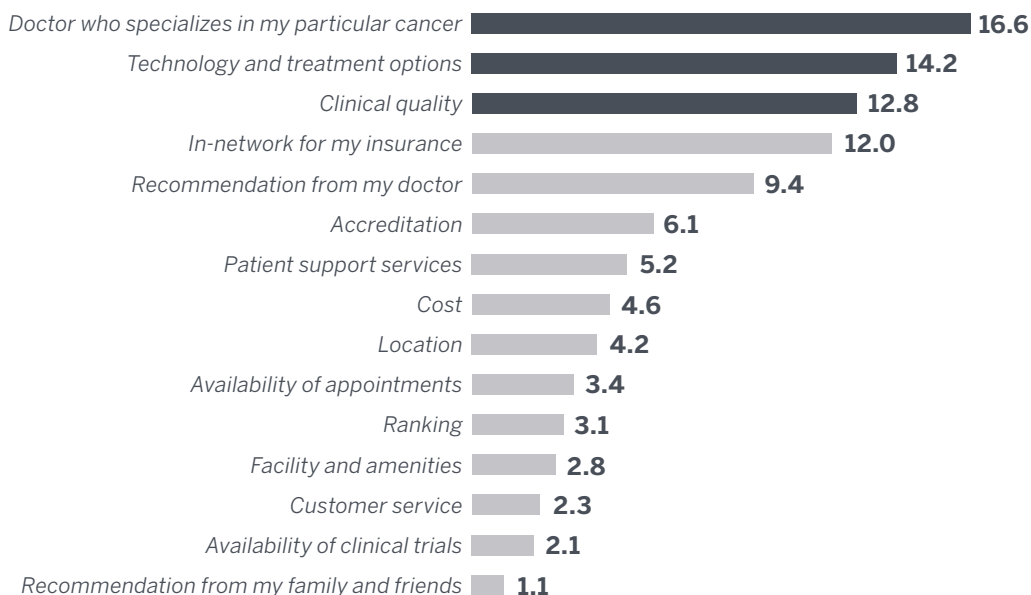
Above all else, cancer patients demand world-class clinical care. Forty-three percent of patients say that “a physician who specializes in my particular cancer” is the **most important factor** guiding their decision about where to seek treatment. Other clinical factors—technology and treatment options, as well as clinical quality—are also among patients’ top concerns.

But that doesn’t mean patients ignore other attributes of care. Less than 5% of respondents ranked “customer service” within their top five most important features—but only because excellent customer service has become a baseline expectation. It is necessary but not sufficient to attract patients.

## When Deciding Where to Go for Care, Which Feature Is Most and Least Important?

Mean Utility Score for Cancer Program Features

n=503



## 02 Convenience is king.

Cancer patients are under enough strain managing the physical and emotional toll of their disease. They don't want to deal with traveling between far-flung facilities or **coordinating complex** details of their care.

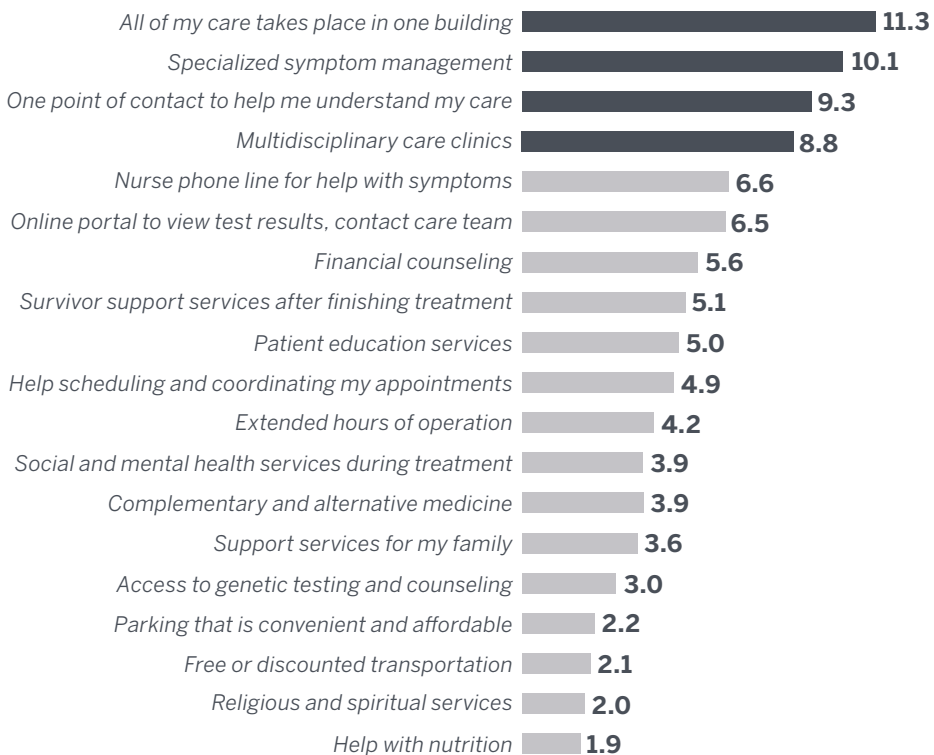
In fact, the four services that cancer patients care about most are all related to **convenience and coordination**, and 37% of respondents ranked “all of my care takes place in one building” as the most valuable feature overall.

These factors have a tremendous impact on patients' experience and satisfaction—and many map directly to questions on CAHPS for Cancer Care, a survey that will likely impact providers' payment in the future.

### When Deciding Where to Go for Care, Which Services Are Most and Least Important?

Mean Utility Score for Cancer Program Services

n=577



These results confirm what many health care executives have long-suspected: **co-location of services** can help cancer programs stand out in the marketplace.

Of course, not every program can afford to build a new facility that houses all cancer-related services. But every program should try to lessen the burden of traveling between its service locations (such as laboratories, imaging facilities, and clinics) through better wayfinding, wheelchair, and parking services.



## 03 Cancer patients aren't so **deferential** anymore.

Although most cancer patients defer to their referring physicians when choosing a provider or treatment, a new type of cancer care consumer is emerging—one who is more active in researching providers, more likely to challenge their recommendations, and more interested in having a seat at the decision-making table.

Although cancer patients are largely considered the most deferential patient population, we found evidence of a changing mind-set:

1. **These days, patients don't rely solely on their physician's recommendation.** In fact, "recommendation from my doctor" was the fifth-ranked factor influencing patients' decisions about where to go for care. Almost five times as many respondents selected "cancer center is in-network for my insurance" as their most important factor.
2. **Patients now research cancer providers online.** Thirty-eight percent of survey respondents indicated that they had read provider reviews online, and 28% looked at quality performance websites.
3. **Younger patients are more willing to change cancer providers during treatment.** Almost 8% of respondents switched cancer programs because they were dissatisfied with their care. Of those "switchers," 72% were under 55 years old.
4. **Patients want to play an active role in their health care decisions.** Many "switchers" cited dissatisfaction with a "doctor knows best" mind-set as a reason for changing providers. As one patient told us, "I was treated well, but I was only offered one option for treatment, and **I wanted more options.**"
5. **The next generation of cancer patients has higher expectations for care.** Patients aged 18-54 score non-clinical features—such as customer service, patient support services, and facility and amenities—higher than older patients do. Throughout their care, younger patients tend to especially value non-treatment-related services, such as survivorship financial counseling, and complementary and alternative medicine.

## 04 Cost matters more than you think.

Even as the public has grown increasingly concerned about the cost of health care, many hospital administrators remain skeptical that patients really worry about money when they're battling a life-threatening disease such as cancer. But our research reveals that, in fact, many cancer patients consider cost a decisive factor in their treatment decisions.

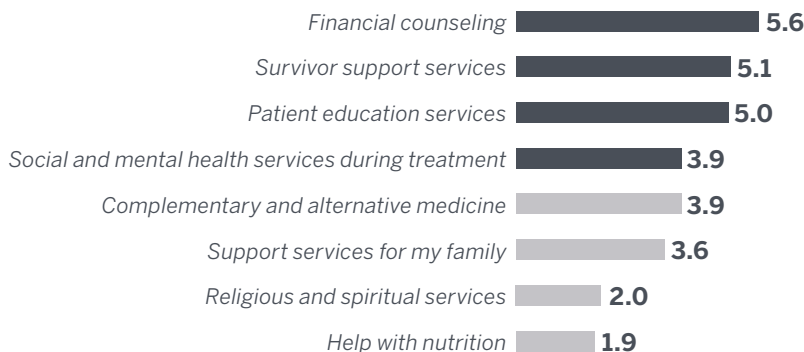
Patients cited “cancer center is in-network for my insurance” as the fourth-most-important feature in selecting a provider.

In fact, more than 24% of respondents chose this as the single most important factor in their decision. And for respondents ages 55-64, in-network coverage was just as important as clinical quality.

Patients also want help managing their costs during treatment. Nearly 30% of respondents ranked “financial counseling” as one of the five services they value most in a cancer program.

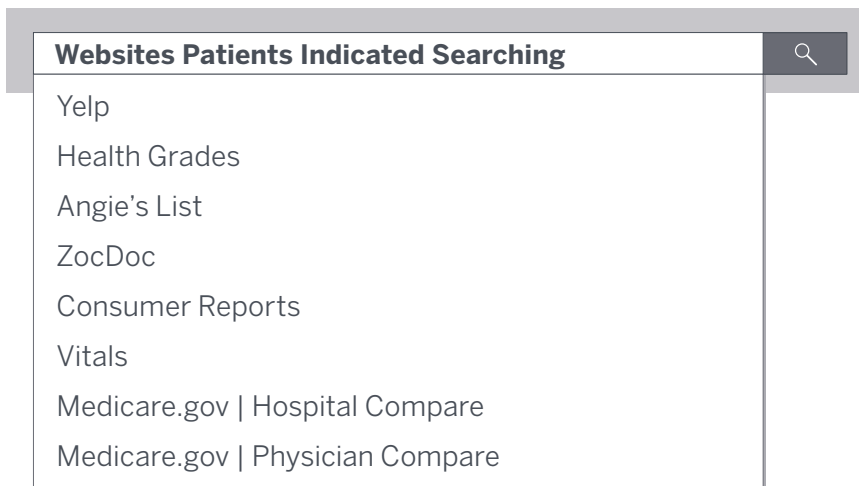
### Value of Financial Services to Cancer Patients

Mean Utility Scores



## 05 “Patient researchers” are a growing opportunity.

Cancer patients no longer just seek treatment at whatever hospital their physician recommends. Increasingly, they find and research their providers online. Overall, 38% of survey respondents read provider reviews, and 28% researched quality performance data.



Researchers tend to be **young** and **educated**.

To attract these self-directed patients, you must know who they are and what they're looking for in a cancer program.

### Compared to Non-researchers, the Researcher...



*Cares Significantly More About*

- Accreditation
- Patient support services
- Ranking
- Availability of clinical trials
- Recommendation from family and friends



*Cares Significantly Less About*

- Doctor who specializes in my particular cancer
- Technology and treatment options
- In-network for my insurance
- Recommendation from my doctor

# 06 Age isn't just a number: younger patients really are different.

You know younger cancer patients differ from older patients. But what are patients in each age group seeking in a cancer care provider? And which services do they value most?

Our survey reveals that younger patients (ages 18–54) have very different priorities and preferences than patients 55 and over.

## Comparing Drivers of Patient Choice by Age

p<0.05 for all features shown

	18–54	55–64	65 AND OVER
Features they care <b>more</b> about when choosing a provider...	<ul style="list-style-type: none"> <li>• Patient support services</li> <li>• Ranking</li> <li>• Accreditation</li> <li>• Customer service</li> <li>• Facility and amenities</li> <li>• Availability of clinical trials</li> <li>• Recommendation from a family member or friend</li> </ul>	<ul style="list-style-type: none"> <li>• Technology and treatment options</li> <li>• Cancer center is in-network for my insurance</li> </ul>	<ul style="list-style-type: none"> <li>• Doctor who specializes in my particular cancer</li> <li>• Technology and treatment options</li> <li>• Clinical quality</li> <li>• Recommendation from my doctor</li> </ul>
Features they care <b>less</b> about when choosing a provider...	<ul style="list-style-type: none"> <li>• Doctor who specializes in my particular cancer</li> <li>• Technology and treatment options</li> <li>• Clinical quality</li> <li>• Cancer center is in-network for my insurance</li> <li>• Recommendation from my doctor</li> </ul>	<ul style="list-style-type: none"> <li>• Ranking</li> <li>• Accreditation</li> <li>• Customer service</li> <li>• Availability of clinical trials</li> </ul>	<ul style="list-style-type: none"> <li>• Patient support services</li> <li>• Ranking</li> <li>• Facility and amenities</li> <li>• Recommendation from a family member or friend</li> </ul>

## Comparing Services Patients Value by Age

p<0.05 for all features shown

	18–54	55–64	65 AND OVER
Services they would value <b>more</b> during their care...	<ul style="list-style-type: none"> <li>Financial counseling</li> <li>Survivor support services</li> <li>Complementary and alternative medicine</li> <li>Support services for my family</li> <li>Social and mental health services</li> <li>Extended hours of operation</li> </ul>	<ul style="list-style-type: none"> <li>One point of contact to help me understand my care</li> <li>A nurse phone line I can call at any time for help with my symptoms</li> </ul>	<ul style="list-style-type: none"> <li>One point of contact to help me understand my care</li> <li>Multidisciplinary care clinics</li> <li>A nurse phone line I can call at any time for help with my symptoms</li> </ul>
Services they would value <b>less</b> during their care...	<ul style="list-style-type: none"> <li>All of my care takes place in one building</li> <li>One point of contact to help me understand my care</li> <li>Multidisciplinary care clinics</li> <li>A nurse phone line I can call at any time for help with my symptoms</li> <li>An online portal</li> <li>Patient education services</li> </ul>	<ul style="list-style-type: none"> <li>Support services for my family</li> <li>Religious and spiritual services</li> <li>Access to genetic testing and counseling</li> </ul>	<ul style="list-style-type: none"> <li>Financial counseling</li> <li>Support services for my family</li> <li>Complementary and alternative medicine</li> <li>Social and mental health services</li> <li>Extended hours of operation</li> </ul>

# 07 Breast cancer patients have higher expectations.

Breast cancer patients are often the most engaged and vocal consumers of cancer care. And because breast tends to be the highest volume tumor site, you must find ways to appeal to these patients—both as they choose their cancer providers and as they undergo treatment.

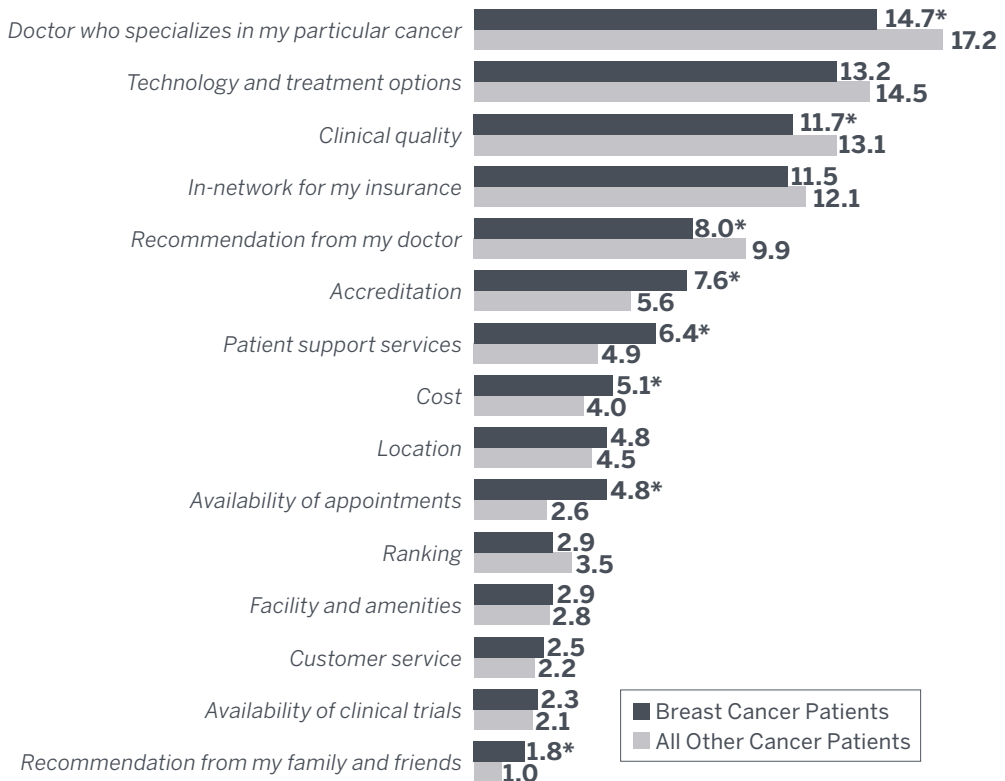
In our survey, breast cancer patients placed importance on a wider range of features than other patients when deciding where to seek care.

In other words, breast cancer patients are more likely to indicate that every feature is important to them.

## Most Important Features When Deciding Where to Go for Cancer Care

Mean Utility Scores<sup>1</sup>

n=140 Breast Cancer Patients, n=462 Other Cancer Patients



1) Features with an asterisk indicate statistically significant (p<0.05) differences.

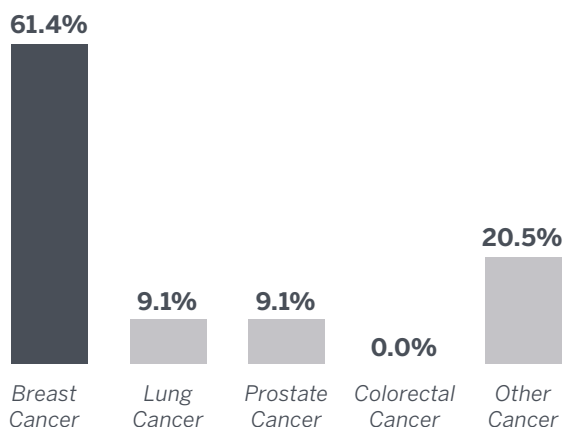
When asked which services would be most valuable to them during their cancer experience, breast cancer patients place significantly more value than other cancer patients on:

- Financial counseling
- Survivor support services after treatment
- Support services for family members
- Social and mental health services
- Complementary and alternative medicine services or referral to such services

Never underestimate the importance of meeting breast cancer patients' needs. They are far more likely to change cancer centers if dissatisfied with their care.

### Patients Who Switched Cancer Centers

Percentage of Respondents by Tumor Type  
n=44

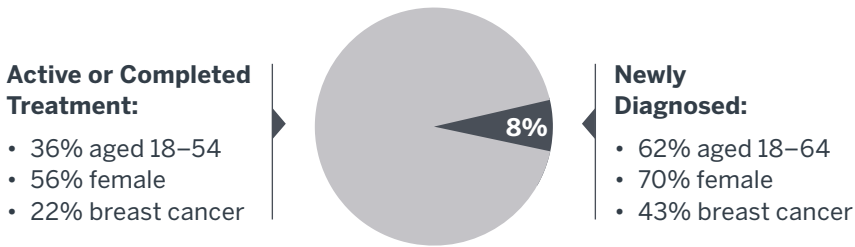


# 08 Newly diagnosed patients have unique preferences.

When patients are first diagnosed with cancer, they feel scared and overwhelmed—and also driven to find a top-notch provider. This powerful mix of fear and fervor leads newly diagnosed patients to express unique preferences.

## Demographics of Newly Diagnosed Patients

n=47 Newly Diagnosed Patients<sup>1</sup>,  
n=536 Patients in Active Treatment<sup>2</sup> or Completed Treatment



To attract newly diagnosed patients, highlight these five features on your website and in outreach materials:

- 1 Doctors who specialize in particular types of cancer
- 2 High clinical quality
- 3 Cutting-edge technology and treatment options
- 4 Accreditation (e.g., accredited by the American College of Surgeons' Commission on Cancer)
- 5 Comprehensive patient support services

1) Patients who were diagnosed within the last two months and have started or will soon start treatment.

2) Patients diagnosed more than two months ago and are still receiving treatment.



What matters most to patients changes over time, so make sure your marketing message and services resonate with patients during each phase of their care.

## Most Valuable Services During Cancer Care

Mean Utility Scores<sup>1</sup>

n=46 Newly Diagnosed Patients,  
n=512 Patients in Active Treatment or Completed Treatment



1) Features with an asterisk indicate statistically significant (p<0.05) differences.

## 09 **Priorities shift** as patients move across the continuum of care

Undergoing surgery is a very different experience than receiving chemotherapy, radiation therapy, or a mix of treatments. So it's no surprise that the type of treatment patients receive greatly affects their priorities—both when they're choosing a provider and during their care.

### **When choosing a cancer program, patients receiving the following treatments care more about:**

Surgery	Radiation Therapy	Chemotherapy
<ul style="list-style-type: none"><li>• Physicians who specialize in a particular cancer</li><li>• Clinical quality</li><li>• Physician recommendation</li><li>• Availability of appointments</li></ul>	<ul style="list-style-type: none"><li>• Patient support services</li><li>• Location</li></ul>	<ul style="list-style-type: none"><li>• Patient support services</li><li>• Accreditation</li><li>• Ranking</li></ul>

### **During their care, patients receiving the following treatments care more about:**

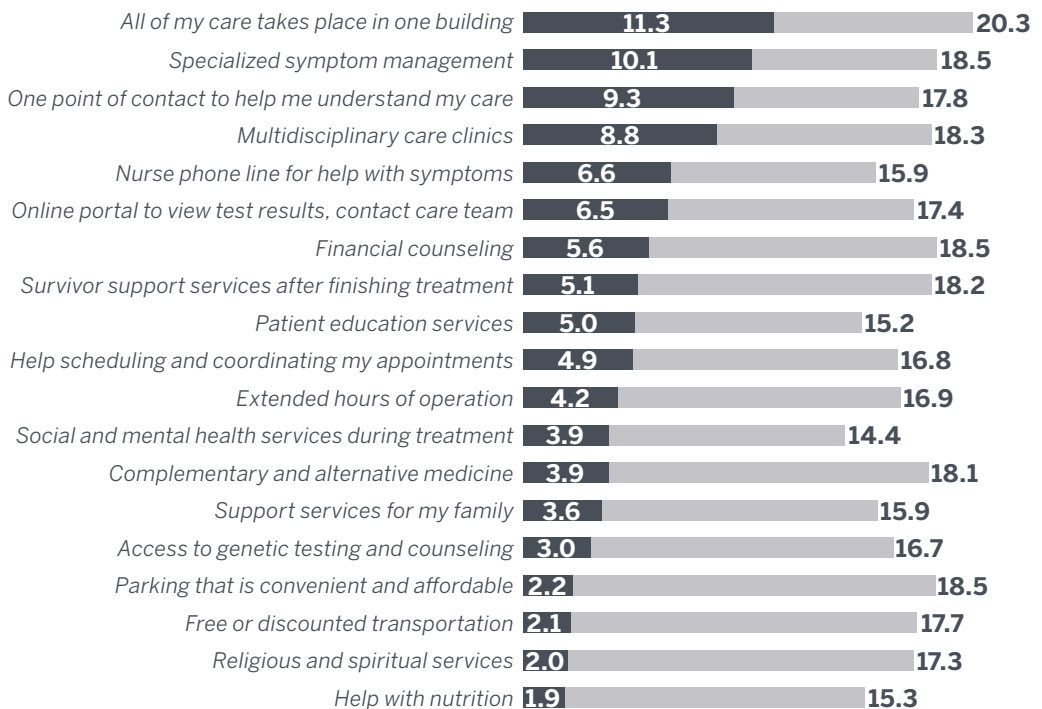
Surgery	Radiation Therapy	Chemotherapy
<ul style="list-style-type: none"><li>• All of my care takes place in one building</li><li>• One point of contact to answer questions and help understand care</li><li>• Multidisciplinary care clinics or meetings where the entire care team discusses a case</li><li>• A phone line to call at any time to talk to a nurse about symptoms</li></ul>	<ul style="list-style-type: none"><li>• All of my care takes place in one building</li><li>• Multidisciplinary care clinics or meetings where the entire care team discusses a case</li><li>• Survivor support services after finishing treatment</li><li>• Support services for family members</li><li>• Patient education services</li></ul>	<ul style="list-style-type: none"><li>• Financial counseling</li><li>• Survivor support services after finishing treatment</li></ul>

# 10 Everything matters to someone.

To be truly patient-centered, you must understand the wide range of patients' preferences. The truth is that every service matters to at least some of your patients.

## Mean and Maximum Utility Scores for Cancer Program Services

n=577



The key is to determine what matters most to your specific patient population.

For example, even though “help with nutrition” scored last in the survey, many cancer programs have discovered high demand among their patients for nutrition counseling. It’s critical to gather feedback directly from your patient population so you don’t miss any opportunity to improve care.

Of course, you probably can’t provide every service that patients value. Rather, you should seek opportunities to partner with other providers, community groups, or national organizations to expand your portfolio of offerings. In this way, you can connect your patients to comprehensive services—including support groups, education resources, and nutrition programs—in a cost- and resource-effective manner.



## Related Resources

Oncology Roundtable members have access to additional resources to better understand the priorities and preferences of their patients:

**Gathering Actionable Feedback from Cancer Patients and Families:** Use our recent study to uncover how your cancer program can better meet the needs of your patient population by gathering actionable patient data and broadening your understanding of the patient experience.

**Cancer Patient and Family Advisory Council Toolkit:** See our nine-step plan to build a Patient and Family Advisory Council, from developing an effective committee structure to ensuring patient and family advisors remain engaged.

**Cancer Patient Experience Survey Results Portal:** Explore the results of the Cancer Patient Experience Survey in our interactive portal, which allows you to slice and dice the data by factors such as tumor type and age to analyze the priorities of unique patient subpopulations.

**Cancer Patient Preferences Explorer:** Interact with the results from the Cancer Patient Experience Survey in our online tool, which allows you to compare and contrast the preferences of demographic subgroups.

**Translate Patient Preferences into Market Advantage:** Our 2015 National Meeting presentation features details on how today's patients are "shopping" for cancer care services, best practices for attracting self-directed patients, and tactics to improve patient-driven clinical decision making.



Access additional  
resources:  
[advisory.com/or](http://advisory.com/or)

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