

Empowering Patient Choice in Radiation Oncology

A Guide for Navigating the
Consumerization of Healthcare

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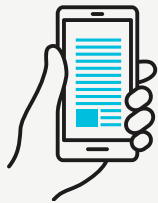
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INTRODUCTION

Empowered Patients Transforming Healthcare

The consumerization of healthcare barely requires introduction or explanation. Bringing their information-empowered mindset from the rest of their lives as consumers, patients increasingly take a proactive, value-minded approach to their healthcare decisions. Just as loyalty is a fading concept in other consumer segments, studies show that consumers' loyalty to healthcare providers is on the decline¹. Ultimately, today's patient-as-consumer has had their expectations "Amazon Primed". More than 75% of healthcare consumers believe that they should receive the same level of service and value in healthcare as they receive from other businesses¹.

What's Driving the Consumerization of Healthcare?



INFORMATION

At Their Fingertips

80%

of consumers research every diagnosis and decision online.¹

**I CAN FIND
BETTER**



EXPECTATIONS

From Other Consumer Experiences

75%

of consumers believe their healthcare service experience should match their other consumer experiences.¹

**I DESERVE
BETTER**



COSTS

Rising Dramatically

500%

increase from 2006–2017 in average deductibles for employer-based coverage.²

**I'M
PAYING
FOR
BETTER**



Consumerization Comes to Radiation Oncology

While the trend started out in specialties like cosmetic and orthopedic surgery — areas where more elective procedures lead to an innate degree of patient choice — consumerization is now a firmly established phenomenon across all healthcare fields, including radiation oncology. Rapid progress in radiation therapy (RT) treatments and technologies has given patients more options than ever for effectively treating various cancerous and non-cancerous tumors and metastases. As patients become increasingly aware of these options, they are naturally taking a more active role in selection. Moreover, they are not just shopping their treatment options — they are shopping treatment providers.

Patients Seeking Out High-Value Radiation Oncology Providers

A 2017 study confirmed that cancer patients are willing to bypass their nearest radiation therapy center, seeking out treatment centers that offer greater perceived value — including innovative technologies and more convenient, shorter fractionation schedules³. This same study made a critical connection between the observed patient choice and “large and unexpected shifts in market share³. In other words, as consumerization and empowered patient choice expand across the field of radiation oncology, we anticipate that there will be clear winners and losers among RT practices.

Patients Seek Out Radiation Therapy Centers

Key findings from 2017 study of prostate cancer patients seeking RT treatment.³



1 in 5 patients sought out higher-value RT care



More Innovative

Patients sought out RT centers with innovative technologies.



More Convenient

Patients sought out RT centers offering shorter, more convenient fractionation



Reputation Matters

Patients sought out early-adopter RT centers, even after adoption had spread to nearby locations.



Patient Mobility Reshaping Market Share

“The patterns of mobility observed have resulted in large and unexpected shifts in market share.”

Radiation Oncology Practices Must Embrace and Support Patient Choice

Within radiation oncology and across the entire healthcare field, many of the same factors driving patient empowerment are also pushing providers to compete for patients like never before. Costs continue rising while the shift to value-based reimbursement models threatens to decrease payments for many traditional treatment modalities. For radiation oncology practices' facing these threats to the bottom line, the focus increasingly shifts to patient volume — both preventing patient leakage and driving new patient population acquisition to power top-line growth.

While the factors shaping the future of the radiation oncology market are certainly complex and still evolving, the overall equation is clear: Radiation oncology practices must secure and grow patient volume in order to position themselves for economic stability and ongoing success. With patients taking an increasingly empowered, value-minded approach to their healthcare decisions, successfully attracting and retaining patients demands that radiation oncology practices embrace and proactively support empowered patient choice.

A Guide to Positioning Your Practice in the Age of Patient Choice

This eBook outlines six clear strategies which can help position your radiation oncology practice as a forward-thinking patient advocate — tactics for attracting and retaining today's informed and empowered healthcare consumers.

**1**

**Be an Advocate —
Encourage Choice**

**2**

**Establish the Baseline:
Good Cancer Control**

**3**

**Open an Honest
Dialog About Side
Effects and Quality of Life**

**4**

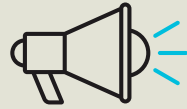
**Convenience:
No Longer Just a
“Nice to Have”**

**5**

**Show Them Why
Precision Matters**

**6**

**Break the Taboo
— Have the Cost
Conversation**



1



What Your Patients Should Take Away:

- I have more choices than ever for effectively treating my cancer.
- There is no one-size-fits-all treatment for my cancer.
- The right treatment for me should fit my priorities.

Be an Advocate

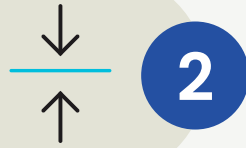
– Encourage Choice

From a provider perspective, there are undoubtedly both pros and cons to the consumerization of healthcare — and it's hard to ignore the potential threat to your practice's economic outcomes. But from a patient perspective — and for the global field of oncology — the expansion of patient choice is a resounding positive phenomenon, representing the momentous progress of the past decade. Progress in our understanding of various cancers has driven the development and advancement of the technologies and techniques for treating them. Establishing patient advocacy within your practice starts with highlighting this encouraging fact: Patients have more choices for effectively treating their cancer than ever before.

There is no one-size-fits-all treatment

From a clinical perspective, you know that there is no one-size-fits-all treatment — even for a specific cancer. However, as effective treatment options expand, the factors influencing the “right” treatment for a patient increasingly shift to the personal level. In other words, the relative pros and cons of a given treatment modality may weigh more heavily, depending on a patient's unique lifestyle and values. Some patients may be preoccupied with certain potential side effects. Others may be particularly concerned about the time commitment (i.e., number and length of treatment sessions). Some may be fearful of surgery and other more interventional treatments. As patients bear a higher portion of the cost of care, more and more patients are concerned about the total financial burden of a given treatment option.

Acting as a genuine patient advocate goes beyond simply encouraging patients to explore their options. It means supporting this exploration by asking patients about their priorities, concerns, fears, etc. in order to provide objective guidance about the relative “fit” of a given treatment modality.



What Your Patients Should Take Away:

- All my treatment options can provide good cancer control.
- I know that this treatment is backed by clinical evidence.

Establish the Baseline

– Good Cancer Control and Quality of Life

At the end of the day, your patients want to feel confident that you can effectively treat their cancer. Moreover, regardless of their specific priorities, ridding themselves of cancer — or at least giving themselves the best chances of curing or stopping its advancement — is the most fundamental priority. So, while they are increasingly empowered to explore their options, patients are inherently fearful that making the wrong choice may impact or shorten their lives. Thus, to become a trusted patient advocate and facilitate a discussion of choice, it's critical to establish that all the potential treatment options you will discuss with them can provide good cancer control.

Point to the evidence — but be prepared to summarize

Today's patient-as-consumer brings a healthy dose of skepticism to their consumer decision-making. They have grown up in a world of questionable marketing claims, and they know to seek out proof. Thanks to the infinite information literally at their fingertips today, they are also more clinically literate than ever. Many want to see the actual primary research that supports a treatment modality. You should be prepared to point them directly to this clinical evidence. But you should also be able to give a high-level, one-minute summary of how existing clinical evidence supports a treatment modality as delivering good cancer control.



What Your Patients Should Take Away:

- There are risks and potential side effects with every treatment option.
- I understand why this treatment option can reduce my risk for certain side effects.

Open an Honest Dialogue

– About Side Effects and Quality of Life

Over the last two decades, patients have been inundated with advertisements and marketing for pharmaceutical and medical treatments. This torrent of information has taught them that no treatment is perfect — and they know to ask about potential side effects, complications and impact on quality of life. Moreover, they are skeptical of the legalese and jargon. They know that terms like “better,” “reduced,” and “improved” are all relative — and those relative comparisons can be easily obfuscated for the purpose of puffing up marketing claims.

Make it personal

One strategy for opening an honest conversation is to ask the patient what side effects they have heard about — and which they are most concerned about. This allows you to frame the clinical evidence around risks and side effects in personal terms, rather than making generic claims that raise patients’ skepticism. “With this treatment, we can actually reduce the risk of the side effect that you are worried about, compared to other treatment options,” is much more personal and genuine than, “This treatment option has the lowest risk of side effects of any treatment option.”

Don’t just tell them: show them

Just as clinicians hesitate to throw primary clinical research at patients, there is also a worry that overly technical explanations will leave patients confused and frustrated. But again, the average patient is more clinically savvy than ever — and with their healthy marketing skepticism, they want to hear the “why” and “how” behind any claimed benefit. Even if they don’t fully understand the details, providing your patients with a basic technical explanation of how a treatment modality can reduce the risk of certain side effects can be a tremendous boon in establishing trust.



What Your Patients Should Take Away:

- Cancer treatment doesn't have to completely disrupt my life.
- I can choose a treatment that better fits my lifestyle.

Convenience

– No Longer Just a “Nice to Have”

Convenience is king in modern consumer culture — and convenience now dominates healthcare consumer decisions, as well. Research suggests that patients rank convenience as the most important factor in their decision-making⁴. However, plenty of people diagnosed with cancer still don't realize that convenience should be a major factor in considering their treatment options. That is because until fairly recently, convenience was an odd topic to introduce into a discussion of cancer treatment options. A cancer diagnosis was often much more dire; treatment options were less advanced. Patients largely accepted that cancer treatment would significantly disrupt their lives. As you well know, thanks to the immense progress of the last 20 years, that is no longer the case.

Highlight relative convenience of a given treatment modality

Since you have established long-term efficacy as the confident baseline, you should clearly highlight how a given cancer treatment modality delivers non-disruptive convenience to your patients. Try to make this discussion personal — identifying specific concerns the patient has regarding how a treatment may disrupt their life. For example, be sure to note treatment factors like:

- Inpatient vs. outpatient — hospital stay, recovery period, etc.
- Number of clinic visits for various outpatient treatment options
- Activity limitations during and after treatment



5



What Your Patients Should Take Away:

- Leading-edge treatment are more precise than ever.
- Precision means better cancer control and reduced risk of side effects.

Show Them

– Why Precision Matters

Several of the biggest advances in cancer treatment relate to the personalization and precision of treatments for various cancers. Leading edge chemotherapies can now be tailored to the exact type of cancer cells. Sophisticated radiotherapies target tumors with sub-millimeter precision and synchronize and adapt to motion. Radical new gene therapies target the unique genetic material of specific cancer cells. In many cases, patients will be comparing an older, less precise treatment option to a newer, more precise alternative. To help your patients understand how breakthrough treatment options like these improve outcomes, start with a simple discussion of why precision matters in the world of cancer treatment.

Targeting the cancer — sparing the healthy tissues

While you obviously understand the advantages of a more-precise treatment option in much more technical and complex detail, here is a quick graphic to simplify that explanation for your patients. Maximum cancer control with the lowest risk of side effects — that's the holy grail, and it starts with precision.





What Your Patients Should Take Away:

- My doctor is thinking about my financial burden.
- I understand the main factors that influence my out-of-pocket costs.

Break the Taboo

– Have the Cost Conversation

Providers have typically avoided conversations with patients about the cost of treatment. Sometimes, this is because providers aren't privy to the complexities of billing and the specifics of a given patient's payer coverage. More often, providers have simply held the line on recommending the "best" option for a patient from an objective clinical standpoint. But the rapid progress in cancer treatment has blurred the lines on what the objectively "best" option is in many cases, and the concept of value is reshaping the entire healthcare landscape. Patients are paying a higher share of the cost-of-care, and they are naturally demanding greater cost transparency. Over 60% of patients say cost transparency is critical to their overall satisfaction⁵ and 80% expect their doctors to clearly communicate the patient's financial responsibility for a given treatment option⁶.

You can get specific without talking dollars and cents

Confidently break the taboo and have a cost conversation with your patients. Without worrying about getting down to dollars and cents, you can get specific by pointing out how the features of various treatment options can impact out-of-pocket costs, including:

- Inpatient vs. outpatient: Discuss the relatively higher costs of inpatient treatment, recovery and follow-up care for more interventional treatments.
- Treatment process: While outpatient treatments are generally less costly to patients, make sure to discuss how things like the number of clinic visits (each typically requiring a co-pay) can influence the total cost of a given treatment option.
- Side effects: Treatment for side effects often has its own cost — an unpleasant reality that adds insult to injury for frustrated patients. While every treatment has risks, you should remind patients reducing their risk of common side effects — even by a little — can have far reaching value in their lives.

CONCLUSION

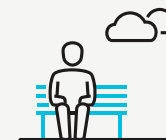
Focusing on the Outcomes that Matter Most



**Proven
Outcomes**



**Fewer
Treatments**



**Minimized
Side Effects**

Increasing consumerization in the field of radiation oncology poses radical new challenges for practices and providers. Highly informed and discerning patients-as-consumers now seek out — and travel great distances — for “better” cancer care. To avoid losing patient volume — and to position themselves to thrive in the evolving landscape of value-based care — RT practices will need to court this empowered patient-as-consumer. This means encouraging and supporting patient choice; moving from being viewed as a service provider to becoming a true patient advocate. But to earn and keep patients’ trust, practices will have to avoid being seen as selling themselves.

Walking this thin line requires a shift in thinking for many RT practices — expanding their clinical perspective to take a patient-first view on what “better” means in radiation oncology. Of course long-term clinical outcomes — beating the cancer — comes first in patients’ eyes. But the encouraging reality is that patients have more options than ever that deliver good cancer control. Thus, practices need to focus on the non-clinical outcomes that matter most to patients: things like convenience of care, short- and long-term quality of life, and, yes, cost. RT practices need to highlight how the innovative treatment technologies they offer uniquely connect with these patient outcomes. And, critically, practices need to frame this conversation in terms of the patient’s unique priorities and concerns. In short, you need to build and tell a compelling story about how you can help a patient treat their cancer and enjoy the life they want to live.

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