

Rebuilding patient volume in a time of fear and uncertainty

How COVID-19 is redefining
expectations in healthcare

MAY 2020

Introduction

The pandemic has had a profound effect on everyone, and for hospitals and healthcare organizations the challenges have been immense. As they shifted their care settings to prepare for a potential overflow of COVID-19 patients, elective procedures, a key driver of revenue, were eliminated or greatly reduced in capacity. Consumers, driven by stay-at-home orders and fear associated with COVID-19, have chosen to put off many types of medical care. As a result, analysts are predicting that hospitals, health systems, and medical practices could face revenue losses of 25% - 35% for the year.

With elective surgeries resuming and stay-at-home restrictions being relaxed, it is important for hospitals, health systems, and medical practices to attract as many consumers as possible. And that leads to an important question, what builds trust and confidence in consumers returning to doctor's offices, outpatient surgery centers, and hospitals? How do their motivations and behaviors change? How can healthcare leaders design marketing messages, and more importantly, experiences to meet their needs?

Approach

Cast & Hue took a mixed methods approach to answer these questions. First, in late-April 2020, we commissioned a survey to a national audience to gain insight into consumers' perceptions of healthcare and decision-making drivers relating to healthcare as restrictions are relaxed. We then followed up with a group of consumers from the survey and conducted in-depth interviews, to uncover perceptions and identify actionable insights. These complementary insights and takeaways from both quantitative and qualitative research can help guide healthcare leaders moving down a path that none of us have experienced before.

Summary of Key Findings



Consumers' confidence in safety around healthcare settings has declined significantly during the time of COVID-19

Healthcare organizations need to develop strategies to bring patients back to their facilities. Focusing on safety measures, especially around increased disinfection and cleaning, personal protective equipment, and the separation of sick versus non-sick patients is critical.



Over 40% of consumers say they have delayed or canceled care due to COVID-19. Almost two-thirds of them plan to wait at least one month after social distancing measures are relaxed before moving forward with delayed care

This represents a sizable opportunity for healthcare organizations to recapture volume. Reasons for delay varied by type of care and location of care, as well as other factors. It is important for providers to understand the nuances for each of their care settings and procedures in order to develop the most effective strategies to rebuild patient volume.



As has been widely reported, telemedicine use has grown exponentially during the time of COVID-19, but challenges remain for continued adoption

While more consumers than ever have utilized telemedicine since the onset of COVID-19, some consumers reported that they'll need to see better experiences and greater value in order to continue telemedicine use as social distancing guidelines are relaxed.

We explore each of these findings in greater detail including perspective from consumer interviews as well as recommendations for healthcare organizations to consider as they work to rebuild patient volumes.

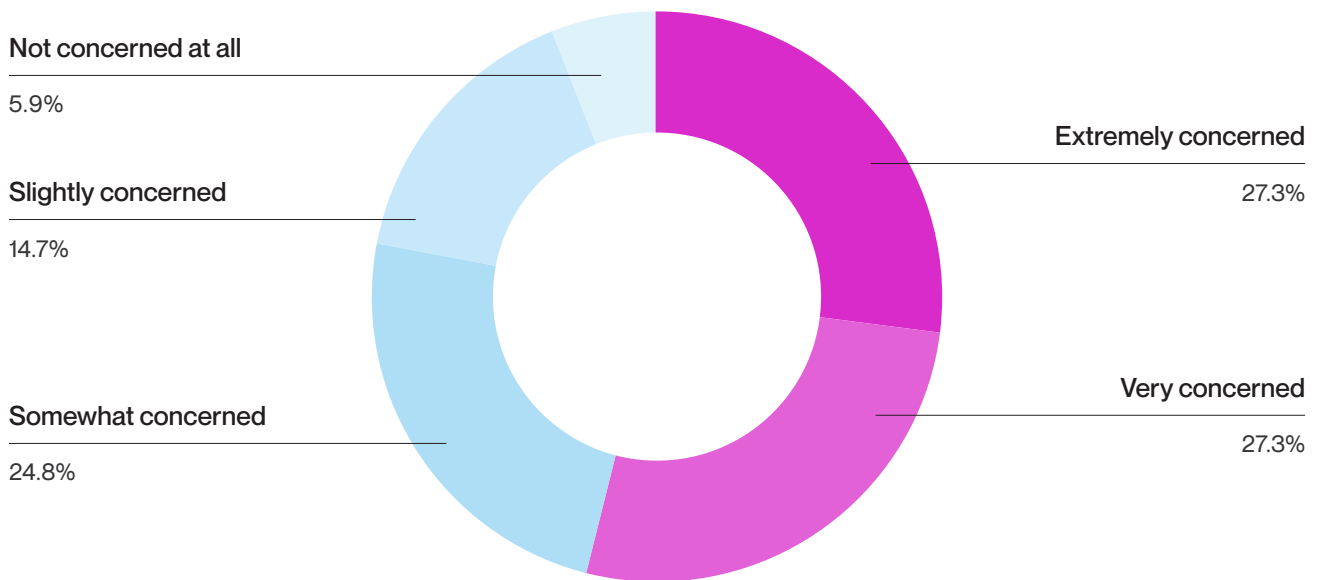
More than half of consumers are worried that COVID-19 will affect their personal health



SURVEY INSIGHTS

How consumers feel about their health provides insight into how these feelings might change their perceptions of healthcare settings. After asking consumers about their level of concern for their physical health in the time of COVID-19, we found that 54.6% are extremely or very concerned. Consumers are afraid and may not be comfortable entering healthcare settings. Moving past the pandemic, the way healthcare systems shape the consumer experience is crucial in order to instill consumer confidence in care.

Consumer concern around COVID-19 affecting physical health



SAMPLE: 407 UNITED STATES RESIDENTS
95% CONFIDENCE LEVEL | 5% MARGIN OF ERROR

More than half of consumers are worried that COVID-19 will affect their personal health

INTERVIEW INSIGHTS

Personal and family health are top of mind as consumers expressed concern for loved ones, young and old. The elderly are a focus of concern for consumers worried about spreading the virus to vulnerable family members. However, consumers also shared worry for populations they once felt were less susceptible to the virus.



I am getting a little more worried that there are children that are being affected by it. And that people my age are starting to have strokes due to it.

— FEMALE | 25-34 | ILLINOIS

Concerns for some consumers were exacerbated by their own pre-existing health conditions, in addition to fear that people are not taking COVID-19 seriously. Understanding consumer feelings related to COVID-19 is important for healthcare systems as they navigate a new normal with heightened consumer expectations.

More than 40% of consumers have delayed care due to COVID-19

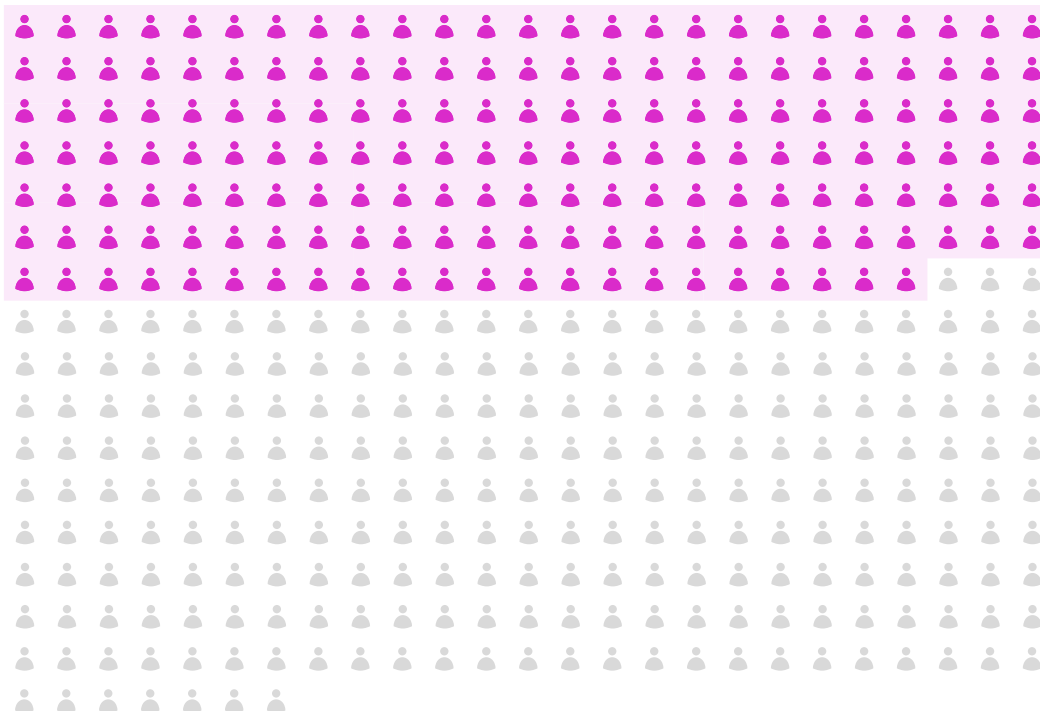


SURVEY INSIGHTS

Consumers delayed or canceled care including appointments, procedures, or surgeries for a variety of reasons. This represents a significant portion of the population who may be looking to follow through with rescheduled or canceled appointments in the future. Healthcare organizations need to maximize revenue quickly by taking proper actions and communications to ensure patients proceed with their delayed or canceled care.



Opportunity



SAMPLE: 407 UNITED STATES RESIDENTS
95% CONFIDENCE LEVEL | 5% MARGIN OF ERROR

More than 40% of consumers have delayed care due to COVID-19

INTERVIEW INSIGHTS

The delayed or canceled care was driven by both providers and patients, with some consumers taking the initiative to cancel care and others following cancellation requests from their providers.

“

I was supposed to have [a sleep apnea study] done in March but they canceled it. They rescheduled my test for the [end of May] ... Right now I am okay, but if we see more people getting sick I might start to get jittery.

— MALE | 45-54 | OHIO

Consumers no longer feel safe in healthcare settings due to COVID-19

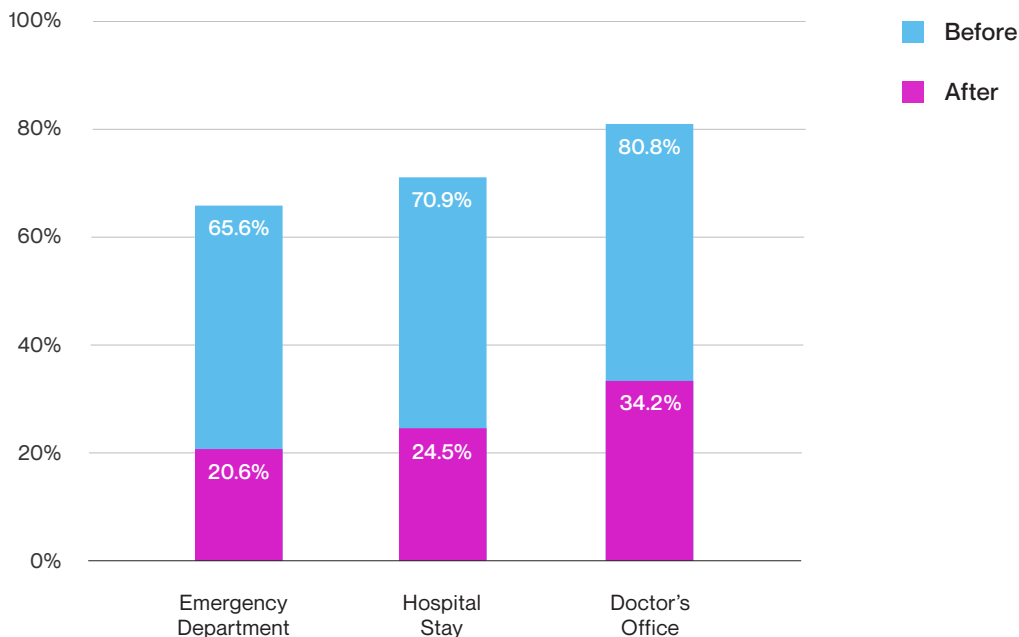


SURVEY INSIGHTS

With the perceived presence of COVID-19 being in and around healthcare settings, confidence in safety within those settings has declined significantly for consumers. Comparing current perceptions to those before COVID-19, perceptions of safety in healthcare settings have dropped by 45%. Although most consumers did not feel safe in any healthcare setting, more consumers stated they would feel safer at a doctor's office over an emergency department or hospital. Delivering on what makes patients feel safe increases the comfort level for places like emergency departments and hospitals. As we will examine later in the report, creating confidence in the cleanliness and precautions taken to reduce patient harm is necessary to draw patients back to these care settings.

Consumers' feeling of safety in the following healthcare settings before and after COVID-19: Doctor's Office / Emergency Department / Hospital Stay

Before/After Feelings of Being Safe



Percentages are based on consumers that felt Extremely Safe or Very Safe in healthcare settings.

SAMPLE: 407 UNITED STATES RESIDENTS
95% CONFIDENCE LEVEL | 5% MARGIN OF ERROR

INTERVIEW INSIGHTS

Consumers demonstrated greater trust in primary care providers and/or specialists with whom consumers had existing relationships.

Consumers who have received care during the pandemic at a doctor's office and/or specialist's office reported feeling safer than other care settings due to their perception of a reduced likelihood of infections in these smaller and more familiar settings.

“

I did not have a problem going to an orthopedic doctor this morning [because] I [went] last week. [Last week] I was a little hesitant. It was my first time there with the epidemic. I was very cautious walking in. My husband sat in the parking lot. I had gloves. I had a mask. I sat on the edge of the chair. I didn't even want to sit back in the chair. Waiting room was not crowded. They had the chairs turned so you were only permitted to sit in certain chairs, which I am guessing were maybe five or six feet apart [and] any door was either opened for me or I opened it with my glove.

— FEMALE | 65-74 | NEW JERSEY

Consumers need reinforcement and understanding of safety measures taken at all types of healthcare settings. Hospitals and emergency departments need increased diligence to instill confidence around safety and re-establish trust with consumers.

Healthcare settings will need to prioritize cleanliness and safety more than ever before

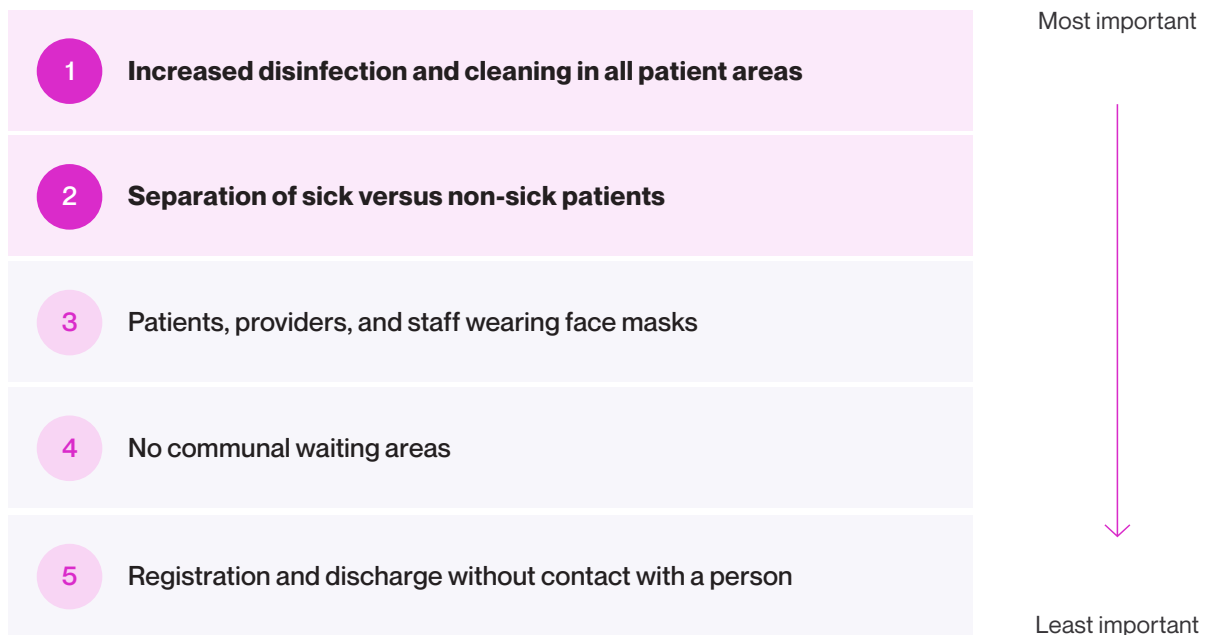


SURVEY INSIGHTS

When presented with five potential safety measures that could be enacted in healthcare settings post COVID-19, two needs rose to the top for consumers. The most important priority is increased disinfection and cleaning in all patient areas. Another highly ranked safety measure is the need for separation of sick versus non-sick patients. Healthcare settings that deliver on these needs for consumers will rebuild their patient volume from delayed and canceled care more quickly than those who cannot.

Most important safety measures for consumers in healthcare settings

Certain safety measures will be most important to consumers after COVID-19



SAMPLE: 407 UNITED STATES RESIDENTS
95% CONFIDENCE LEVEL | 5% MARGIN OF ERROR

Healthcare settings will need to prioritize cleanliness and safety more than ever before

INTERVIEW INSIGHTS

Consumers expressed expectations around significant separation of patients in healthcare settings, beyond six feet. Consumers also reported feeling most comfortable with the elimination of waiting rooms altogether, opting to wait in cars or at home.

“

I want a separate waiting area for people who are sick or not sick. We need social distancing in waiting rooms. I don't like when I'm in a waiting room and there are tons of seats open but someone will sit next to me. People need to keep space from each other after this.

— FEMALE | 25-34 | FLORIDA

Along with the expectation that masks, gloves, and hand sanitizer be used by both patients and providers, some consumers interviewed also expected to see temperature checks on each individual entering and exiting healthcare settings.

“

I'd be horrified if I went to an emergency room and they were allowing people to sit side-by-side in a waiting room, if they weren't wearing masks or taking temperatures. These are the things I expect to be in place and if I were to enter a medical facility of any kind (clinic, hospital, etc.) I'd probably go back to the car and call them on the phone and ask them what the heck is going on.

— MALE | 55-64 | GEORGIA

Healthcare systems need to make sure they explain the steps they are taking to keep COVID-19 patients separate from other patients during the pandemic and also moving forward. Further emphasis must be placed on personal protective equipment for everyone in the healthcare setting, patients, caregivers and staff alike. Meeting or exceeding these expectations around cleanliness and safety for consumers is a new competitive advantage.

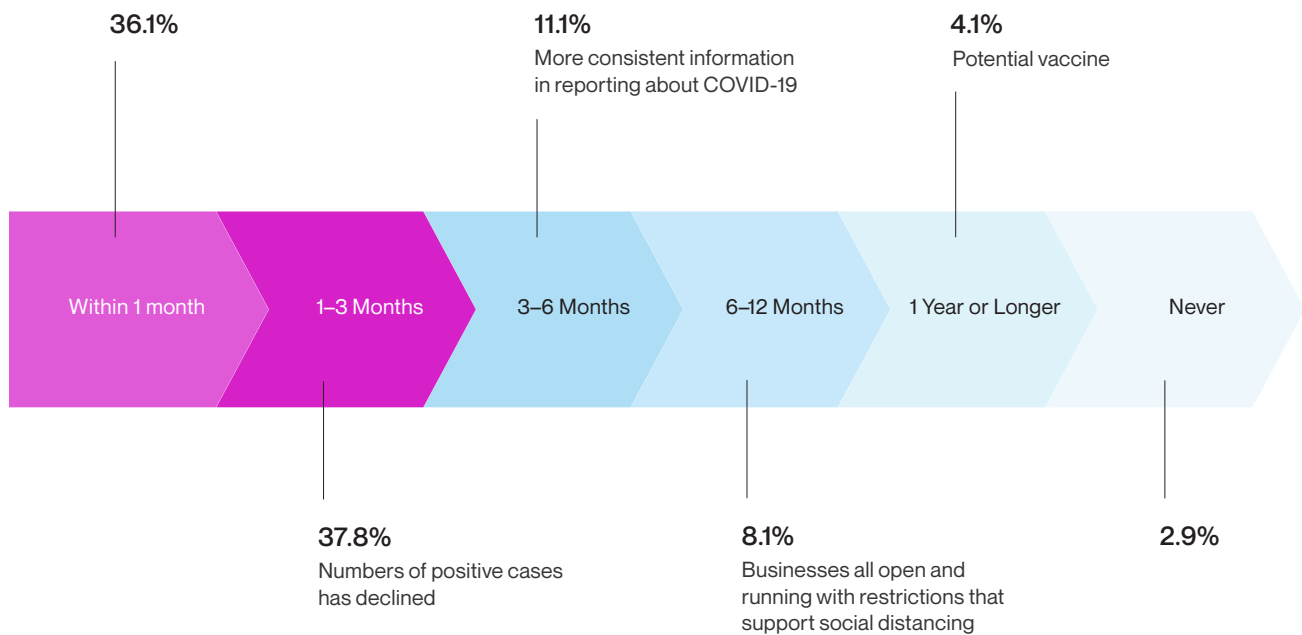
Fear and anxiety will drive two-thirds of consumers to delay medical care at least a month or longer



SURVEY INSIGHTS

There is no definitive timeline for when consumers who have delayed medical care will begin to feel safe in continuing elective care as social distancing rules are loosened and healthcare locations are fully open again. 36% of consumers indicated they would reschedule care within the first month, while 49% planned on delaying care anywhere from 1 - 6 months. This is an opportunity for healthcare organizations to identify key drivers of trust and confidence in order to motivate consumers to reschedule on a faster timeline.

Consumer plans to move forward with medical care that was delayed or canceled due to COVID-19



Context below percentages on the graph is derived from qualitative interviews and represents what consumers *think* will happen.

SAMPLE: 172 UNITED STATES RESIDENTS THAT HAVE DELAYED MEDICAL CARE
95% CONFIDENCE LEVEL | 7% MARGIN OF ERROR

INTERVIEW INSIGHTS

Consumers reported feeling safe in receiving care within a few months as noted on the previous graph. Consumers also shared that this depended greatly on the type of care and continued prevalence of COVID-19. If the care could be provided at a safe distance from the provider, consumers expected to feel safe receiving care in the coming months. However, for care that consumers deemed as requiring close physical contact with providers, the comfort in receiving this type of care was much longer, closer to six months.

“

I don't think June is going to be adequate for something as invasive as dental care. I think that would be moved maybe to September. 'Invasive' being that there are hands in my mouth that aren't mine, three people's faces really close together, equipment I assume has been sterilized but I wasn't present. I'm okay with my doctor's appointment this week because we are sitting across the room from each other, talking.

— MALE | 55-64 | NEW JERSEY

Consumers' perception of personal space and physical contact even with providers has drastically changed. Moving forward it is important to understand the new physical boundaries consumers expect with their providers to feel safe, including visual cues of sterilization and all staff and providers in personal protective equipment.

The number of consumers that have used telemedicine has more than doubled since the onset of COVID-19;

however, challenges remain for continued adoption

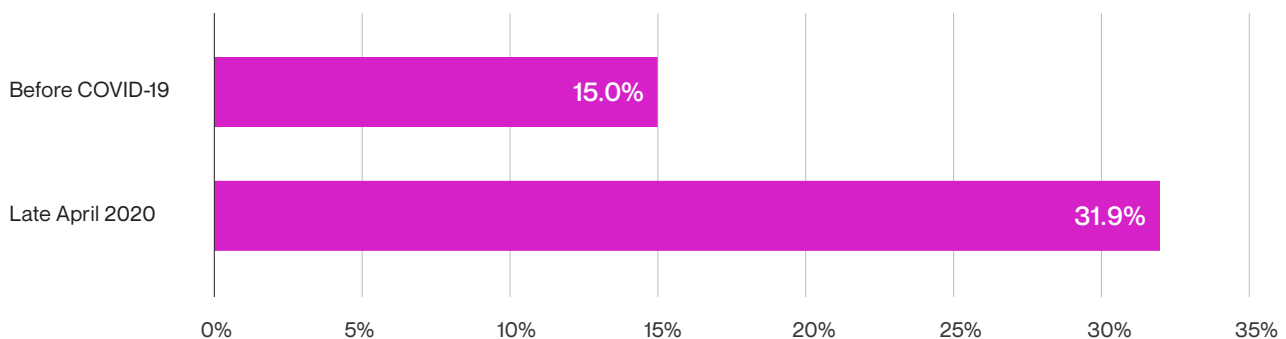


SURVEY INSIGHTS

Our research showed that the number of consumers who have used telemedicine at least once surged 113% since the onset of COVID-19, reflecting many media reports about the increased usage of telemedicine. While many reports are predicting that this may be a “tipping point” for telemedicine adoption, our research suggests that more work needs to be done to drive regular use of telemedicine. This increased utilization of telemedicine was often not based on consumer choice, but on appointment availability and stay-at-home restrictions. As a result, time will tell if these new experiences result in new habits.

There are still many perceived barriers around telemedicine for the 68% of consumers who have not experienced telemedicine either before or during COVID-19. Of those, 50% indicated they prefer in-person visits. Another 42% reported they were unaware of the availability of telemedicine or not clear on how to start using it. There is an opportunity to build sustained adoption of telemedicine as consumers are hesitant to visit physical care settings. However, communicating its benefits and educating consumers about how and when to use is important in driving preference.

Consumers who have used telemedicine at least once

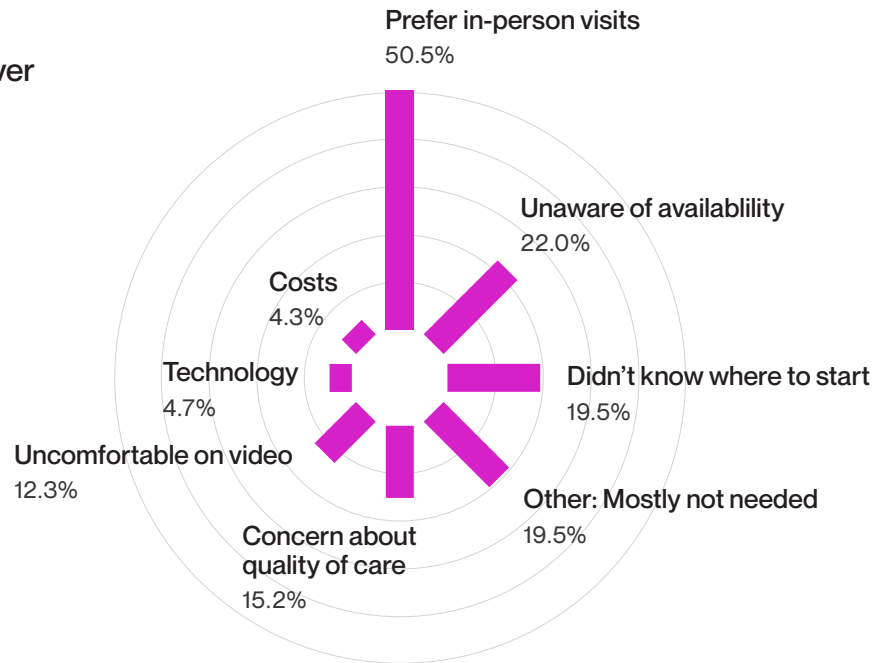


15% of consumers surveyed had used telemedicine before COVID-19. After the onset of COVID-19, the number of consumers surveyed who had used telemedicine either before or during the pandemic jumped to 32%.

SAMPLE: 407 UNITED STATES RESIDENTS
95% CONFIDENCE LEVEL | 5% MARGIN OF ERROR

The number of consumers that have used telemedicine has more than doubled since the onset of COVID-19; however, challenges remain for continued adoption

Reason(s) consumers have never used telemedicine



SAMPLE: 277 UNITED STATES RESIDENTS (NEVER USED TELEMEDICINE)
95% CONFIDENCE LEVEL | 6% MARGIN OF ERROR

INTERVIEW INSIGHTS

Overall, consumers interviewed expressed an increased interest in telemedicine. The majority felt that telemedicine was an acceptable option for minor conditions. However, consumers still questioned the overall value of telemedicine. Not only did they express a lack of knowledge around the most appropriate use cases for telemedicine, but some indicated skepticism around the ability to get an accurate diagnosis virtually.

Consumers who experienced telemedicine for the first time during the COVID-19 pandemic were not immediately converted to telemedicine advocates. While no one expressed full dissatisfaction with the experience, it is evident that consumers are still trying to understand the value and ideal use cases for telemedicine. In short, they seem apathetic to it.



If you see a doctor twice a year [like me] then telemedicine doesn't work. If you need to see a doctor more often, then it might work. If the doctor needs to do any tests, it can't be done over telemedicine.

— MALE | 35-44 | NEW YORK

The number of consumers that have used telemedicine has more than doubled since the onset of COVID-19; however, challenges remain for continued adoption

“

[My] very first time with [telemedicine] was during [COVID-19]. I had a video [appointment] for my daughter because she had gotten a tick bite recently ... It was nice that you can do it from your house. But I also feel like it makes it feel a little less personal ... Obviously there is a video so they can see what is going on but not as detailed and [what] they would see if they were up close and personal ... I feel like you can't get as good of a reading when there is an actual problem over that kind of communication.

— FEMALE | 25-34 | ILLINOIS

Consumers also believed telemedicine visits should cost less than a typical in-person appointment due to the perceptions around telemedicine requiring less work and time for providers.

“

I'm hoping this becomes more affordable. A lot of people already forgo the doctor because they don't want to pay a \$30 copay. I'd like to see all insurance costs come down but maybe if these costs could be less because you're not physically seeing the doctor.

— FEMALE | 55-64 | VIRGINIA

Overall, there remains a level of unease and lack of trust in the value of telemedicine, even with the forced adoption of telemedicine for many during COVID-19. Work remains for healthcare systems to convince consumers that telemedicine is a channel they can trust and have confidence in.

COVID-19 has forced a sea change in the use of telemedicine. To build on it, healthcare systems and providers now need to better understand the needs and expectations of consumers around their telemedicine visits, and ensure they build messaging and experiences that build trust and deliver value to consumers.

Summary

As this research demonstrates, understanding consumer needs, motivations, perceptions and decision-making drivers is key to recapturing market share in this next phase during the era of COVID-19. We believe this report provides you with important foundational insights as you develop new experiences and communications plans for those you serve.

Mixed Methods

The survey was distributed to consumers across the United States who were 25 years of age or older, did not work directly with patients in a healthcare setting and had an annual HHI of \$50K or more in the last 12 months. The survey had a total of 407 responses from April 21 to April 27, 2020. For results based on the total sample, the margin of error was 5% with a 95% confidence level. For results based on those who have never tried telemedicine (n=277), the margin of error was 6% with a 95% confidence level. For results based on those who have delayed care (n=172), the margin of error was 7% with a 95% confidence level.

From the survey responses, a subset of participants were selected for qualitative interviews. This subset included consumers who had delayed medical care as a result of COVID-19.

About Cast & Hue

Cast & Hue designs customer and patient experiences that foster loyalty between our clients and the people they serve, accelerating growth and innovation while minimizing frustration. Our work is empathy-driven, human-centered, highly rigorous and relentlessly practical. Cast & Hue is passionate about transforming organizations to be more aligned with the needs of their customers and patients. Utilizing a design thinking mindset, we are a dedicated partner that promises to find meaningful ways for our clients to grow, with a track record of creating exceptional experiences.

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