

# Building Patient Trust Is More Critical Than Ever

WHITE PAPER | PATIENT ENGAGEMENT

2021 Stericycle Communication Solutions U.S.  
Consumer Trends in Patient Engagement Survey



## Introduction: Lessons Learned Over the Past 12 Months

No one could have predicted the twists and turns the pandemic has taken since early 2020, but one thing is clear: if we don't learn from our collective successes and failures, we can't expect to be better prepared for what comes next. Healthcare executives and leaders need to understand what is and isn't going well with the patient experience and their expectations as the pandemic continues to impact access, action, and adherence for healthcare consumers.

To that end, Stericycle turned to the best source for insights into the patient experience: healthcare consumers. We surveyed more than 500 healthcare consumers across the United States about their healthcare experiences over the past 12 months. Our 2021 U.S. Consumer Healthcare Trends in Patient Engagement report sheds light on the current high and low points in the patient journey. It also illuminates how evolving consumer preferences and expectations are impacting health systems today and provides a glimpse into the future of patient engagement.

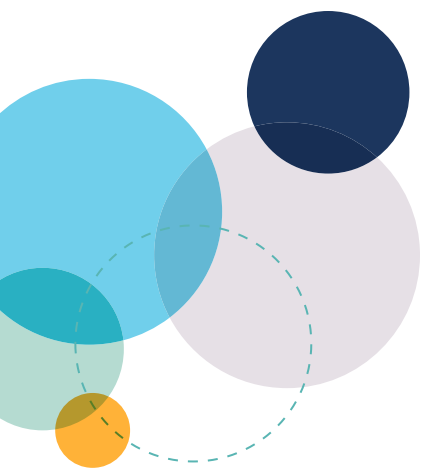
As health systems prepare their strategies for what's next, brace for increasing competition, and plan for higher demand from postponed services, this report can help them learn from patient experiences over the past 12 months. We will highlight what these findings mean for health systems and providers and how organizations can make this information actionable as they improve patient engagement strategies.



Our 2021 U.S. patient engagement report sheds light on the current

## HIGH & LOW POINTS

IN THE PATIENT JOURNEY.



## Patient Trust in Their Healthcare Partners is High

The pandemic has made it clear that — now more than ever — healthcare consumers need trusted partners in managing their health. The more patients engage with their providers and health systems, building trust and deepening relationships, the better their health literacy, satisfaction, and outcomes.

Almost every respondent (98%) in our survey felt that they can communicate their healthcare concerns freely with their healthcare provider(s) — an extremely promising sign that consumer trust in physicians and other healthcare professionals remains high despite the threats posed by the pandemic.

### MOST PATIENTS TRUST THE INFORMATION THEY GET FROM THEIR PROVIDERS

Our survey was conducted in the summer of 2021, a crucial point in the latter stages of the vaccine rollout as well as a time of heightened hopes that the pandemic would soon be over. In this atmosphere, patients expressed a high level of trust (95%) in the information shared by their healthcare provider on public health issues.

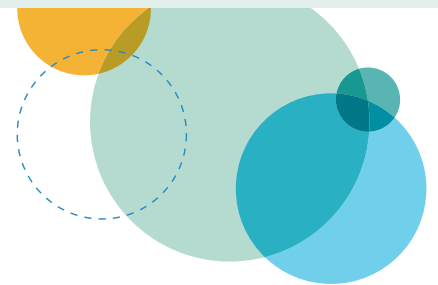
*Do you trust the information your provider shares with you on public health issues?*



3%  
My provider does not communicate information on public issues.

### How often do providers communicate practice updates?

Monthly, 34% of patients receive practice updates from their primary healthcare provider, with 24% receiving updates quarterly, 20% receiving them weekly, 15% on an annual basis, and 7% never receiving practice updates from their primary healthcare providers.

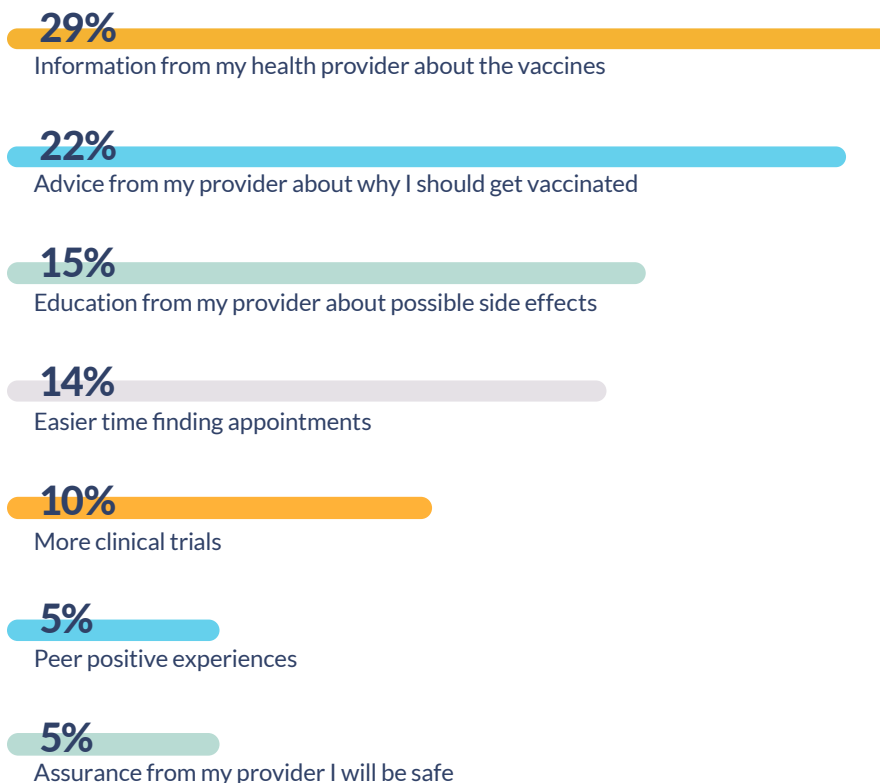


## HALF OF THE UNVACCINATED SURVEYED WOULD RECONSIDER THEIR CHOICE WITH MORE INFORMATION

Of survey respondents who were not yet vaccinated, 29% say information from their healthcare provider about the vaccines would make them reconsider getting it, 22% say they would reconsider based on education from their provider about possible side effects, and 15% say that advice from their healthcare provider on why they should get vaccinated would make them reconsider.

Given the ongoing threats to trust during the pandemic — concerns about political interference in public health recommendations, frequently changing recommendations based on advances in scientific understanding, disinformation, and more — it's imperative that patients receive information about vaccines, booster shots, variants, and other related educational updates directly from their healthcare providers.

### *What would make you reconsider receiving a COVID-19 vaccination?*



## Communicating booster availability

A significant proportion (84%) of the survey respondents who are vaccinated say they would get a COVID-19 vaccine booster shot every year if needed.



Among those who would get a booster shot, **almost half (44%) would prefer to receive email outreach** from their healthcare provider to prompt them to get the shot.



## Hybrid Care Adoption Increases

Hybrid healthcare combines in-person and remote patient care with digital technology to improve outcomes. The hybrid care model has become increasingly popular in the past 12 months due to the convenience of telemedicine visits combined with in-person care when needed as patients feel more comfortable resuming traditional on-site care.

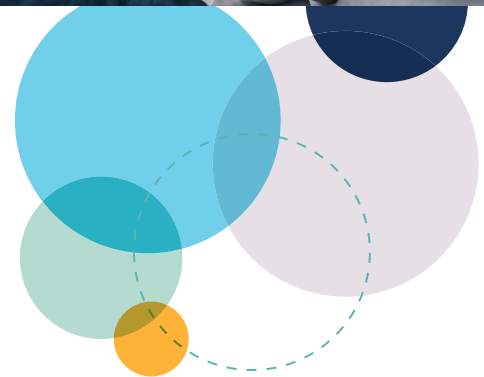
However, providing a frictionless hybrid care experience for patients and providers alike is not a trivial effort. While technology such as telemedicine was a saving grace for many during the pandemic, confusing technology experiences and language barriers were also roadblocks for accessing care for some patients. Not all consumers can access virtual care – or even know whether their physician offers it. Broadband availability is also a concern for rural populations and patients living in poverty.

Healthcare systems and providers who don't effectively engage, communicate, and educate patients on the care options available to them see some patients deferring the care they need to manage chronic illnesses<sup>1</sup>.

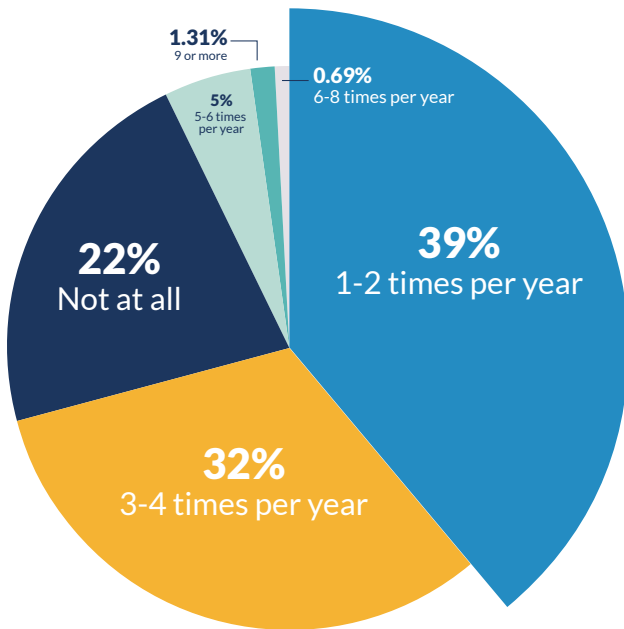
### TELEMEDICINE INTEREST REMAINS HIGH

More than three-quarters of the healthcare consumers in the survey have utilized at least one telemedicine appointment in the previous 12 months, with 39% reporting that they attended one or two telemedicine appointments with 32% indicating they attended three or four telemedicine sessions. A small percentage (7%) report attending five or more telemedicine appointments during the previous 12 months.

In addition to most respondents using telemedicine, half (53%) say they used more telemedicine appointments than in the past and 41% say they used the same amount, compared to only 6% who used fewer virtual visits.



*In the past 12 months, how often did you utilize telemedicine appointments?*



**53%**

of respondents say they consumed **more telehealth visits** in the past 12 months while only 6% said **fewer**.

## CONVENIENCE AND SAFETY ARE TOP DRIVERS OF TELEMEDICINE USAGE

Satisfaction with telemedicine is high, with 85% rating their experience as good or excellent. The top reasons for continuing to use telemedicine are convenience (41%) and safety (36%), with 11% indicating cost as a factor. A further 8% report that they get access to a better provider through telemedicine, and 4% indicate that their provider only offers telemedicine visits.

*Why did you choose a telemedicine visit?*



## IN-PERSON CARE BOUNCES BACK BUT SOME ANXIETY AND FRUSTRATION REMAIN

By June 2021, many patients had returned to in-person care. Nearly two-thirds (63%) report attending an in-person visit to a healthcare provider in the past 12 months, with respondents preferring to access dermatology and primary care (48%) via in-person appointments, followed by pulmonology (44%).

Despite the high percentage of patients who have had in-person care in the past year, 53% say they are not yet comfortable accessing care in person. Only 12% of patients over 65 years of age are comfortable accessing in-person care.

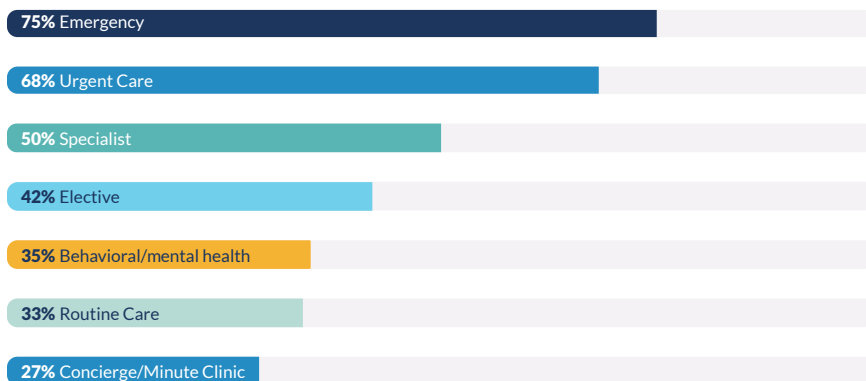
The majority of survey respondents are comfortable using in-person care for emergencies (75%) or urgent care (68%). However, a smaller percentage of respondents would do so to visit a specialist, receive elective treatment, or for behavioral/mental healthcare.

Finally, a significant percentage (41%) report they felt rushed during their doctor's appointment, which is lower than the 54% who reported the same perception in 2020, yet still high compared to those (19%) that indicated they felt rushed before the pandemic.

*Have you had an in-person visit with a healthcare provider within the past 12 months?*



*In what setting are you comfortable accessing in-person care?*



**41%**  
of respondents report  
**FEELING RUSHED**  
during their appointment.

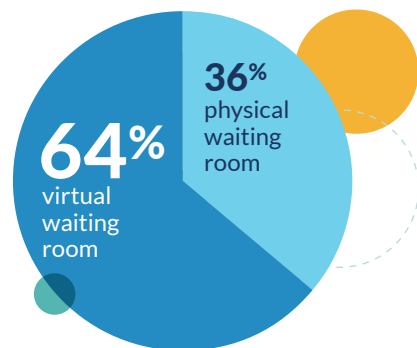


## VIRTUAL WAITING ROOMS ARE CONVENIENT, SAFE, AND PRIVATE

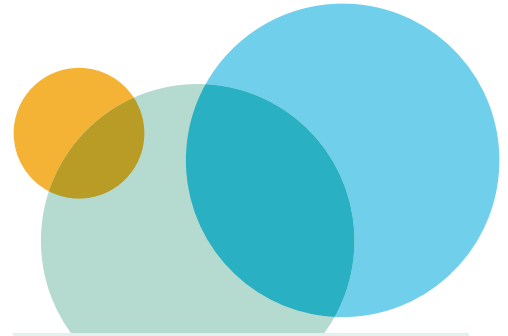
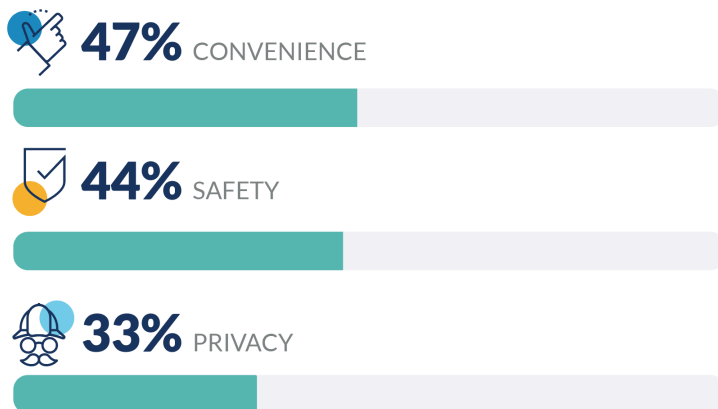
Even though the survey was completed at a time when optimism of a return to normal was relatively high across the country, more than half (64%) of the respondents still prefer virtual waiting rooms to physical ones. While the 2020 survey reported 81% preferred virtual waiting rooms, the survey was conducted in November 2020, before vaccines became available.

For those preferring virtual waiting rooms, convenience (47%), safety (44%), and privacy (33%) were cited as the key reasons. Among respondents who prefer a physical waiting room, 44% feel that sitting in a designated location makes it easier for their healthcare provider to find them, while 42% believe that communication is challenging in a virtual waiting room. A smaller proportion (14%) say they don't have a vehicle in which to wait.

*If given the choice today, would you choose to wait in a virtual waiting room or a physical waiting room?*

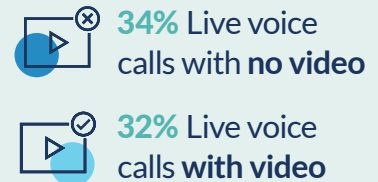


*Why would you prefer a virtual waiting room?*



## With video or without? Both are fine with patients.

According to survey findings, patients showed an almost **equal preference** for interacting with healthcare providers.





## Good Communication Drives Action and Adherence

Like the hybrid care model, effectively communicating with patients in the right channel at the right time to drive action and adherence requires a combination of digital and voice approaches.

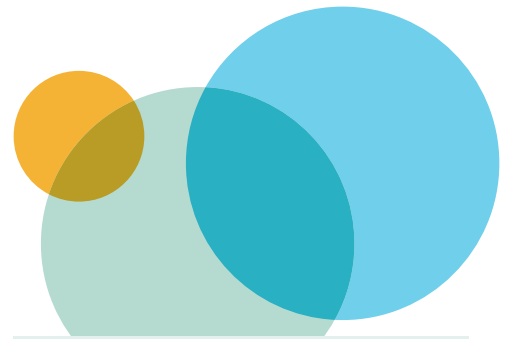
Based on the survey findings, most healthcare systems and providers are doing a good job communicating with their patients. In fact, most consumers surveyed (8 out of 10) were satisfied with the level of communication they receive from their primary healthcare providers. Nonetheless, 19% are not satisfied with the level of communication they receive from their providers, which leaves much room for improvement.

### EMAIL IS A TOP COMMUNICATIONS CHANNEL, BUT PHONE CALLS ARE STILL IMPORTANT

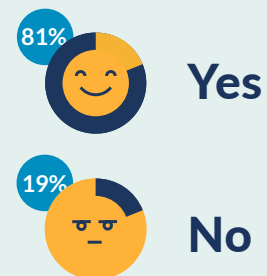
For patient engagement, email (33%) from their primary healthcare providers gets the most response, while 29% are more likely to respond to a phone call. A further 27% preferred text messages from their providers.

For missed mental health appointments, phone calls (48%) prompted the most people to reschedule versus emails (26%) or texts (26%).

*Which channel of communication from your primary healthcare provider(s) are you most likely to respond to?*



*In the past 12 months, were you satisfied with the level of communication you received from your primary healthcare provider(s)?*



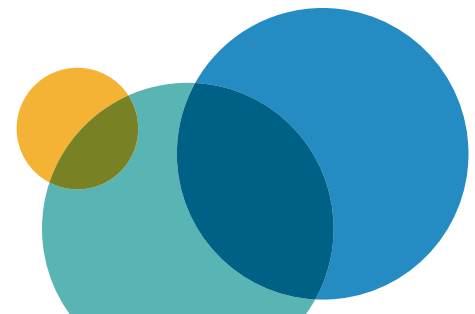
## NEARLY EVERYONE SCANS OR READS EMAIL FROM THEIR PROVIDERS

Of the respondents who receive email communications from their healthcare providers (94%), 92% do not ignore them. They open and scan the contents (53%) or fully read (39%) the email. Only 2% ignore the email completely, neither opening nor reading it. Surprisingly, 6% of healthcare consumers receive no email communications from their healthcare providers.

## ALIGN IMPORTANCE AND URGENCY WITH THE CHANNEL

Choosing the right channel for communication requires more than considering patient preferences – it also means aligning the channel with the type of information being communicated. The survey results show that text messages are best suited for urgent or critical information with 59% of patients fully reading text messages sent from their healthcare providers as compared to 39% who fully read their emails.

*Which channel of communication from your primary healthcare provider(s) are you most likely to respond to?*



**Text messages  
are best suited  
for urgent/critical  
information.**

### Lack of Communication



**6%**  
of respondents said they  
get **no communication**  
from their provider.

## PATIENTS WANT MULTIPLE REMINDERS, BUT TWO ARE ENOUGH

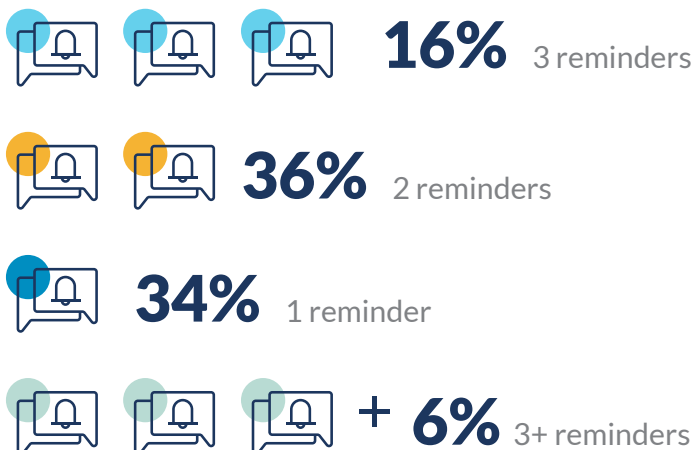
Substantially more patients want multiple reminders to help them keep track of their appointments with healthcare providers. In 2021, 71% say that multiple reminders help them keep track of appointments, which is 14 percentage points higher than in 2020.

However, two reminders are sufficient, with 36% of respondents preferring this frequency (compared to 30% in 2020). A slightly lower proportion (34%) of respondents want just one reminder, compared to 42% of patients in 2020. Many respondents (68%) say that more than three appointment reminders overwhelm them.

*Do multiple reminders help you to keep track of your appointments?*



*How many reminders do you need from your healthcare provider(s) prior to your appointment?*



**68%**  
of respondents  
say that more than three  
appointment reminders  
**OVERWHELM**  
them.

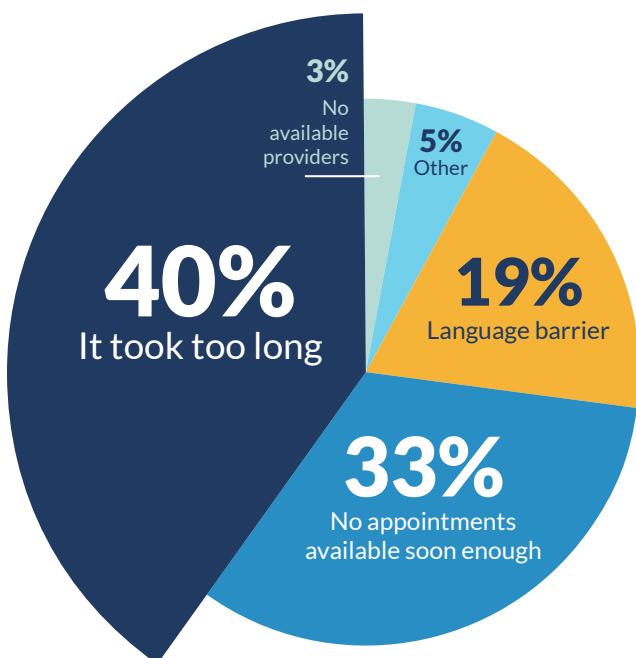
## Patient-Friendly Scheduling Drives Satisfaction and Access

Scheduling is one of the continuing points of friction in the patient journey. While more than half (62%) of patients are very satisfied with their scheduling experience, among those who were somewhat satisfied or not satisfied, long wait times (40%) is the most dissatisfying aspect of the experience. A lack of available appointments (33%) within a suitable timeframe also negatively affects patient experience. Language barriers (19%) are a problem for some patients as well.

*How satisfied were you with your scheduling experience?*



*Why were you somewhat or not satisfied with your scheduling experience?*

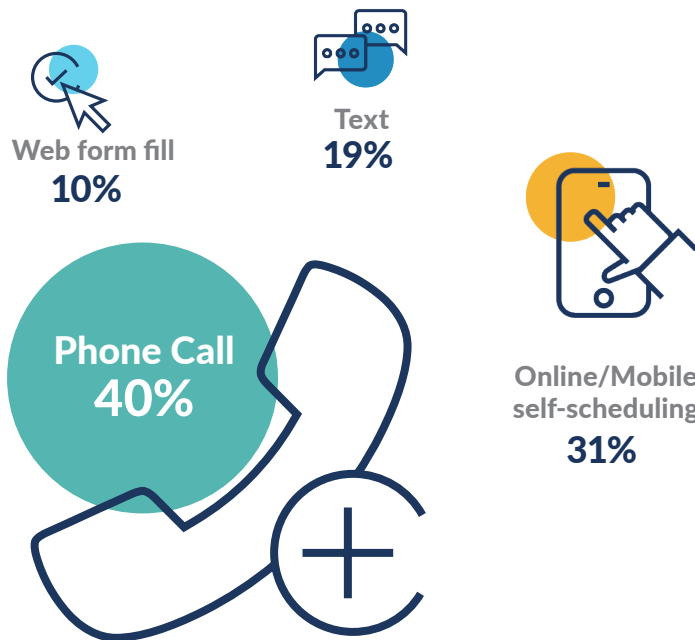


## HYBRID SCHEDULING REDUCES SOME FRICTION

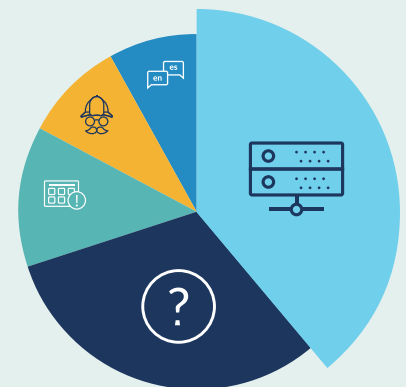
The highest proportion (40%) of respondents use the phone to make an appointment, followed by online/mobile self-scheduling (31%) and text scheduling (19%). Web forms (10%) were the least popular.

Extending the hybrid concept to scheduling helps address the needs of a varied patient population by providing a choice of live voice scheduling (without long wait times) and easy-to-use, convenient online scheduling for those that prefer it.

### How did you schedule your appointment?



*If you have not used online scheduling to book your medical appointments, what has prevented you from booking online?*



- 39% Lack of technology or internet bandwidth
- 31% Confusing experience
- 13% Provider does not offer online scheduling
- 9% Lack of privacy
- 8% Language barrier

## ONLINE SCHEDULING ADOPTION REMAINS LOW

According to survey respondents, adoption of online scheduling is still low, primarily due to a lack of access to technology or internet bandwidth (39%) or a confusing experience (31%). Interestingly, given the prevalence and rising demand for online booking services, 13% of respondents say that their healthcare provider doesn't offer online scheduling.

Of those that don't currently use online scheduling, 55% say they would make use of it in the next 12 months if the booking experience was easier, 22% say they would use it if there were more appointment slot availability, 16% say more training and guidance would convince them to use it, while 7% are looking for multi-language support when booking online.

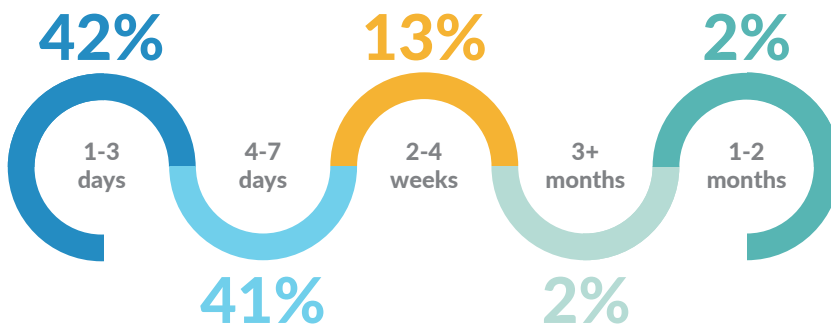


## WAITING MORE THAN A WEEK IS TOO LONG

Consistent with last year's findings, when scheduling a non-emergency appointment, 83% of patients are willing to wait up to seven days before considering other care options. This is nearly equally split between those willing to wait between one and three days (42%) and those willing to wait between four and seven days (41%).

Anything longer than seven days and your health system risks losing patients to more responsive and available providers. Strategies for improving scheduling should include making more care venues and appointments available for both online and phone scheduling.

*When scheduling a non-emergency appointment, how long are you willing to wait before considering other care options?*



## Emergency Room and Home Health Care Usage Grow

As healthcare systems prepare for future patient engagement needs and continue transitioning to hybrid care, it's important to understand the usage of emergency room (ER) and home health services. To address this, we introduced a new line of questions in this year's survey reporting on both types of healthcare services.



**47%**

of respondents state they received care in an ER setting in the past year, which is higher than 40.3 per 100<sup>2</sup>, the **NATIONAL AVERAGE.**



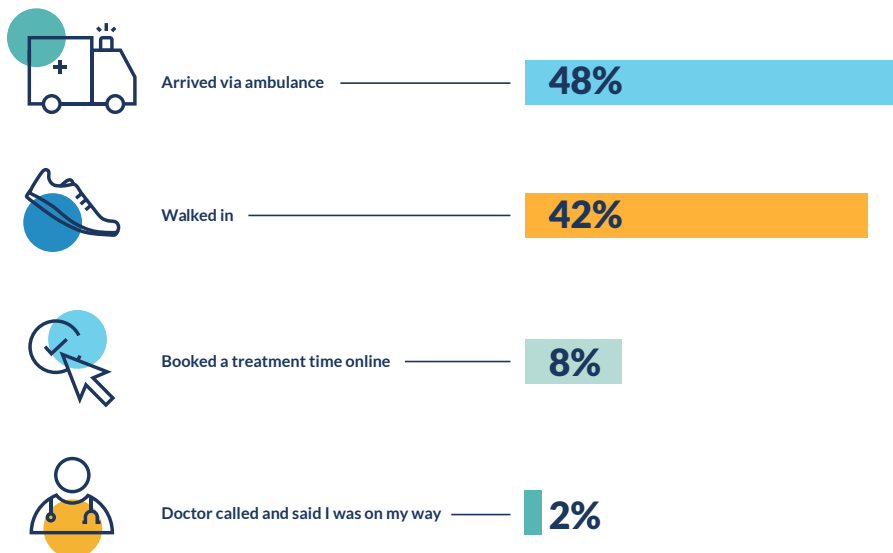
## ER DEPARTMENT USAGE IS HIGHER THAN AVERAGE

Almost half of respondents (47%) state they received care in an ER setting in the past year, which is higher than the national average of 40.3 per 100<sup>2</sup>. Given the unplanned nature and urgency of these visits, the vast majority (90%) of patients surveyed arrived at the ER without a prior booking, with 47% arriving via ambulance, 42% walking in, 8% booking a treatment time online, and 2% having their doctors call ahead to say they were coming.

*In the past 12 months have you received care in an emergency room setting?*



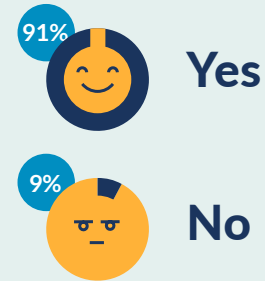
*How did you book time to visit the ER?*



## MOST PATIENTS WERE SATISFIED WITH THE ER EXPERIENCE

While most were satisfied (91%) with their ER experience, those that weren't cited a lack of communication about care steps (29%), a lack of communication about wait times (25%), long waits (17%), and a rushed experience (17%) as reasons for their dissatisfaction.

*How satisfied were you with your emergency room experience?*



*If not satisfied, what was not satisfying about the experience?*

- 29%** Lack of communication about care steps
- 25%** Lack of communication about wait times
- 17%** Waited too long
- 17%** Rushed Experience
- 12%** Provider unable to help

## NEARLY HALF REPORT USAGE OF HOME HEALTH SERVICES

Almost half of respondents (46%) confirm that they or someone in their family used home health services in the past 12 months. These services include post-operative and chronic wound care, rehabilitation, physical therapy, intravenous therapy, and injections, among others.

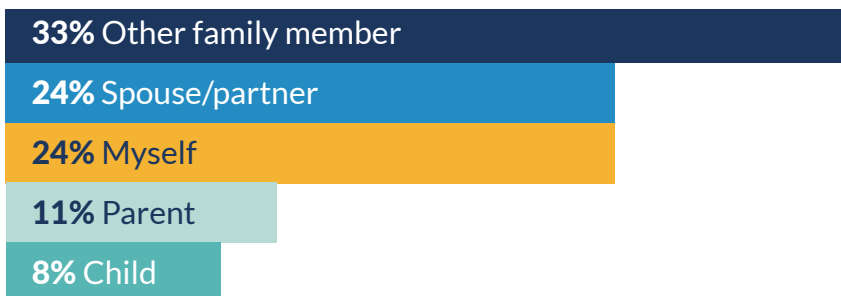
Most home health visits are for other family members (33%), while 24% of respondents say that these services are for themselves or their spouse/partner. Parents account for 11% of home visits, with children making up just 8%.

While 46% of respondents are very satisfied with the level of care received using home health services, there is still room for improvement as 54% say they are only somewhat satisfied.

*In the past 12 months, has anyone in your family used home healthcare services?*



*Which family member(s)?*



## What These Findings Mean for Your Health System

Going forward, establishing and strengthening trust in the provider-patient relationship should be the centerpiece of an overarching engagement strategy that spans the patient journey and the organization to include marketing, operations, patient experience, IT, and finance. Here are some core areas of improvement based on our survey findings to include in your strategy.

### OPTIMIZE YOUR HYBRID CARE MODEL TO IMPROVE ACCESS AND BUILD TRUST



**Combine** the best aspects of virtual and in-person care to deliver hybrid care that improves efficiency while creating a more rewarding patient experience.



**Create** a frictionless telemedicine or in-person experience with online and live voice scheduling solutions, patient reminders, and technical support for patients who are new to virtual visits.



**Offer** both virtual and physical waiting rooms to meet shifting patient preferences.



**Provide** a seamless and contactless experience, from online self-scheduling to virtual waiting rooms and online check-in for patients who still prefer the convenience and safety of limiting contact with others when visiting their doctor's office in person.

### FOSTER ENGAGEMENT AND DRIVE HEALTH LITERACY AND ACTION



**Counter** ongoing threats to patient trust in their healthcare providers by regularly communicating public health information.



**Broadcast** COVID-19 virus, variants, vaccine, and booster updates via email and text messages.



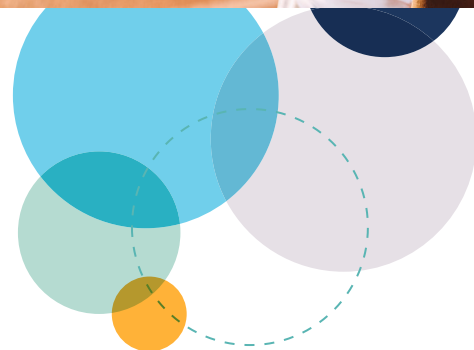
**Educate** specific patient groups, such as those who have not yet received the COVID-19 vaccine.



**Address** questions about vaccine side effects and other public health issues by providing dedicated hotlines for patients, caregivers, and staff.



**Offer** a wide variety of health classes and events to promote patient engagement in their unique health journey.



## COMMUNICATE AND ENGAGE PATIENTS USING MULTICHANNEL STRATEGIES



**Use** a combination of automated text, email, professional recorded voice, and live agent messages to deliver the right information at the right time to help patients understand how to access care, encourage them to take action, and remind them to adhere to their care plan.



**Send** two reminders using the patient's preferred communication channel to reduce no-shows and suppress additional reminders upon patient or caregiver confirmation.



**Make** more care venues and appointments available to prevent patients from having to seek care elsewhere when the wait is too long.

## MAKE SCHEDULING MORE PATIENT FRIENDLY AND IMPROVE ACCESS



**Address** the top scheduling frustrations for patients with fast, convenient, and easy online self-scheduling and multilingual live voice scheduling.



**Increase** adoption of online scheduling by making the process easy to use and understand.



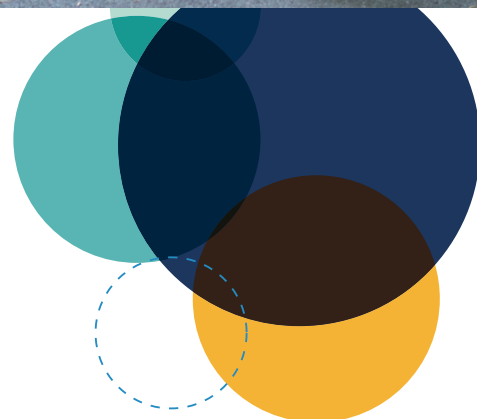
**Diversify** your digital solutions by offering online scheduling in native languages for non-English speaking patient populations.



**Provide** multi-lingual live voice agents for those that prefer a human touch.



**Enable** live voice scheduling and self-scheduling across all care venues, including emergency, urgent care, physicians, specialists, and telehealth.





## IMPROVE ER EXPERIENCES WITH BETTER INFORMATION AND COMMUNICATION



**Enable** online check-in and virtual waiting rooms for patients with low-acuity illnesses and injuries who can wait at home until their projected treatment time.



**Send** arrival notifications 15 minutes before patients arrive, allowing ER staff to prepare space and supplies ahead of time.



**Provide** patients and their families with up-to-date information on the status of their visit and care.



**Offer** digital tools to help patients and family navigate their ED experience.



**Schedule** follow-up appointments at discharge to improve patient outcomes and reduce readmission.

## About the Survey

The 2021 Stericycle Communication Solutions U.S. Consumer Healthcare Research survey included 535 consumers across all 50 states to understand their healthcare experiences in 2021 and the ongoing impact of the COVID-19 pandemic on those experiences. The 20-minute survey was conducted primarily with outbound calls (71%) and online surveys (29%) during the summer of 2021, a time when the vaccine rollout was nearing its initial goal and the Delta variant-driven surge was not yet widespread across the country. Survey respondents included a generally representative distribution of age, household income, marital status, and geographic regions.



## Modernizing Patient Engagement. Maximizing Patient Outcomes.

Stericycle offers the most comprehensive patient engagement platform in the industry. We are the only provider that seamlessly combines both voice and digital channels to provide the modern experience healthcare consumers want while solving complex challenges to patient access, action, and adherence.

Learn more at [StericycleCommunications.com](https://StericycleCommunications.com).

1: Healthcare Dive One-third of US adults postponed care during pandemic: reports | Healthcare Dive<sup>1</sup>

2: 2018 National Hospital Ambulatory Medical Care Survey Public Use File,  
Centers for Disease Control and Prevention, National Center for Health Statistics