

# What the Pandemic Taught Us About Patient Engagement

WHITE PAPER | PATIENT ENGAGEMENT

Highlights from the Stericycle Communication Solutions  
U.S. Consumer Trends in Patient Engagement Survey



## Reconnecting with Healthcare Consumers

While the broad impact of COVID-19 is still unfolding, health systems are looking to understand how they can emerge stronger in the coming months and years. To do so, healthcare executives and leaders must reimagine and reinvent the patient engagement journey and make it a cornerstone of their strategic plans.

To understand how best to recapture lost revenue while strengthening patient loyalty and trust, health systems need insight into how the pandemic impacted patient needs, expectations, and experiences. What went right in 2020 as health systems pivoted to virtual medicine during the pandemic? What did not go as well during the pandemic from a patient experience and satisfaction perspective?

The inaugural Stericycle Communication Solutions U.S. Consumer Trends in Patient Engagement Survey set out to help answer these and other questions. Through an objective third party, Stericycle surveyed more than 500 healthcare consumers to understand their healthcare experiences in 2020 and the impact of COVID-19 on those experiences.

As your healthcare organization moves beyond rapid responses and on-the-fly pivots, you can learn from the mistakes made across the industry and apply these learnings to your new mid- and longer-term strategies for stronger, more effective, and lasting patient engagement. This report highlights top findings from the survey and what they mean for your health system as you plan for how to recoup and grow revenue, rebuild patient trust, and attract new patients.

## Handling the Big Cancellation

When the pandemic hit in the U.S., the combination of lockdowns and fear of the virus set off massive cancellations of in-person medical services. Elective surgeries were postponed. Patients delayed seeing their providers for check-ups, immunizations, and other non-emergent care.

While the loss of immediate revenue was significant, some health systems were better prepared and able to take the initiative to remain in communication and rebook the same or similar services in a virtual setting as quickly as possible. For many others though, the pandemic and mass cancellations exposed and magnified existing weaknesses in patient communication and scheduling.



## STERICYCLE SURVEYED HEALTHCARE consumers

to understand their healthcare experiences in 2020 and the impact of **COVID-19** on those experiences.

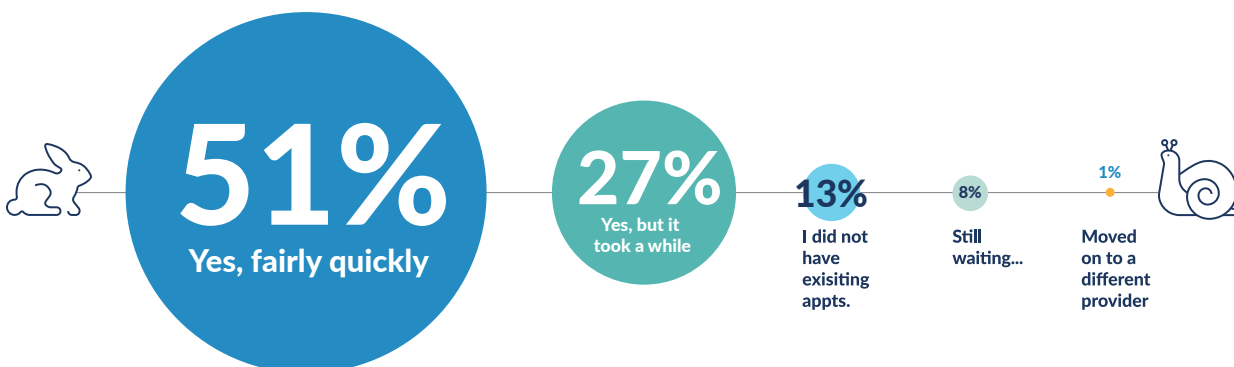


## RESCHEDULING HICCUPS

Roughly half (51%) of patients in the survey report being contacted “fairly quickly” about rescheduling their cancelled appointments. However, for more than one-quarter (27%), it “took a while” for their healthcare providers to contact them to reschedule. Incredibly, another 8% of respondents are still waiting to hear from their providers months after their existing appointments were cancelled.



Figure 1: If any of your existing appointments were cancelled due to lockdown as a result of the pandemic, were you contacted by your healthcare provider’s office to reschedule?



## Communications that Get a Response

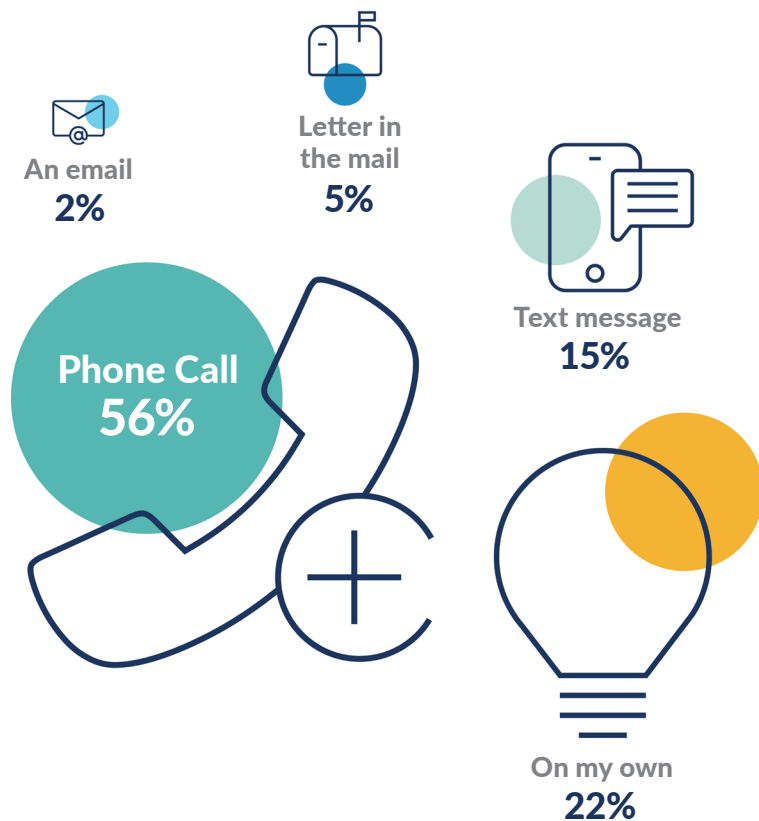
Of those patients that rescheduled, more than half (56%), were prompted by a phone call from the doctor's office. Almost one-quarter (22%) received no prompt at all but rescheduled on their own. Text message (15%), letter (5%), and email (2%) rounded out the channels providers used to contact their patients to reschedule cancelled appointments (see Figure 2).

Not surprisingly, age played a role in patient engagement with certain communication channels, with younger age groups (between 25 and 44 years of age) preferring text and those over 35 preferring a phone call. The only patients who reported responding to an email from their provider were between 35 and 44 years of age.

### Meet Patients in Their Preferred Channel

For communication with their primary healthcare providers, the most popular channel (37%) for consumers in the survey is email, followed by phone (30%), and text (28%).

Figure 2: If you rescheduled your appointment, what prompted you to reschedule?



## Pivoting to Virtual Alternatives

Most health systems were able to pivot to telemedicine to continue serving their patients while protecting all parties involved from exposure to the virus in a healthcare setting. While some providers and systems were able to move faster than others, our survey confirmed what research and anecdotal reports have also shown: the overall number of telemedicine visits grew during the pandemic.

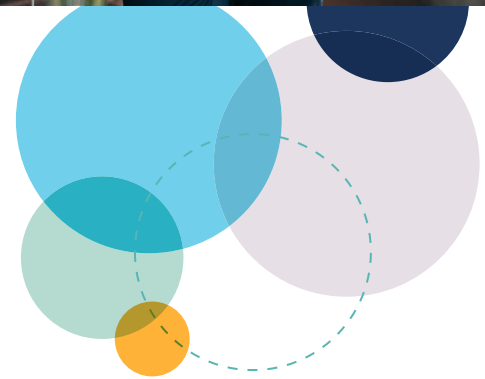
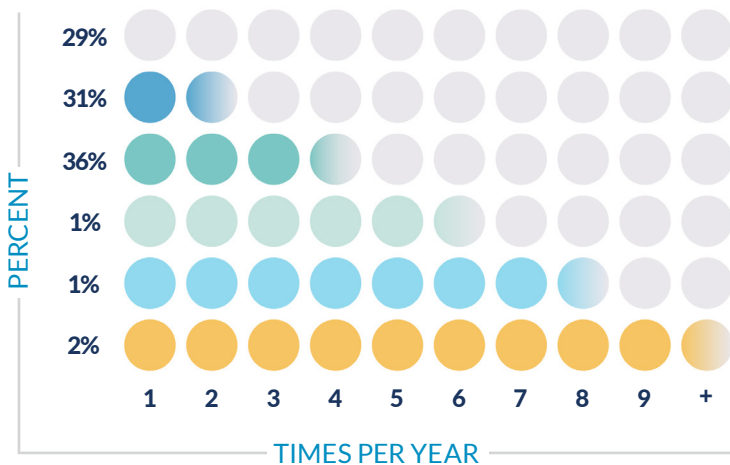
### TELEHEALTH UPTICK

In our survey, 36% report they've accessed care via telemedicine or virtual channels three to four times since COVID-19 began, with nearly one-third (31%) saying they accessed virtual care once or twice. A majority of respondents shared that online consultations have greatly improved access to healthcare services and made healthcare more convenient. Highlighted benefits included lower consultation costs, improved doctor availability, and seamless integration with online prescription fulfillment and delivery platforms.

At the same time, more than one-quarter (29%) did not access care via telemedicine or virtual channels at all. One possible explanation for why so many did not take advantage of telemedicine is that certain types of appointments aren't as well suited to virtual visits as others. For example, survey respondents preferred in-person visits for more specialized medical care such as urology, ENT (ear, nose, and throat), and pulmonology appointments.



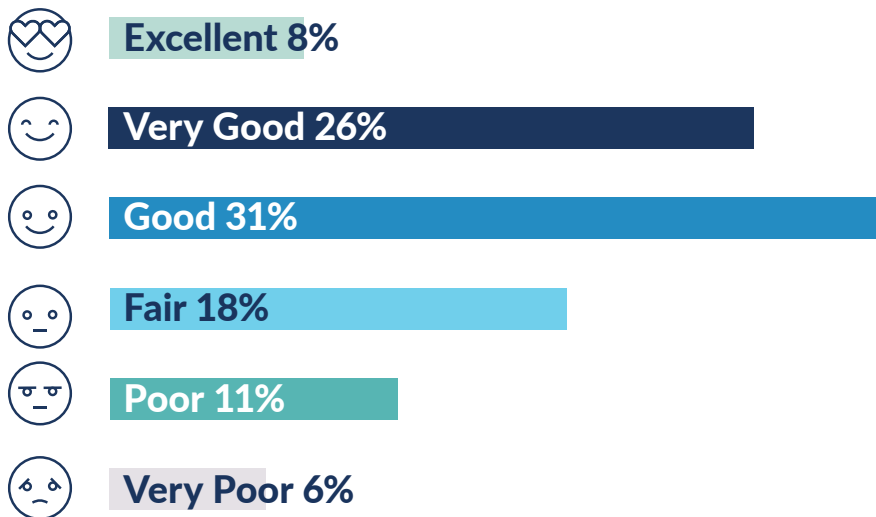
Figure 3: Since COVID-19, how many times have you accessed care via telemedicine or virtual channels?



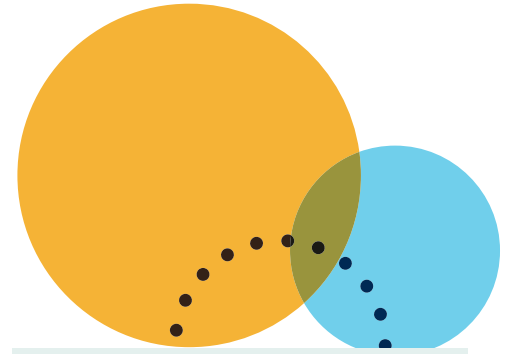
## Waiting Somewhere Else

For those patients needing in-person visits (34%) during the pandemic (people with emergencies, urgent cases, or elective procedures), healthcare providers often provided virtual waiting rooms instead of, or alongside, physical waiting areas. Half of respondents (52%) reported using a virtual waiting room during their visits, where they remained in their car, at home, or near the facility until an exam room was ready. The majority (65%) of these consumers said that they had an “excellent,” “good,” or “very good experience” with the virtual waiting room service. Only 17% of patients said they had a “poor” or “very poor” experience.

Figure 4: Have you ever utilized a virtual waiting room, where you stay in your car, at home, or nearby the facility until an exam room is ready? How was your virtual waiting room experience?



While in-person visits are expected to rebound post-pandemic, especially for certain types of visits, virtual waiting rooms and services will remain important to help patients safely and conveniently access the care they need in the right setting.



### Whether In-Person or Virtual, Reminders Are Still Essential for Preventing No-Shows

More than half of respondents (57%) report that multiple reminders help them keep their appointments. Yet, 42% prefer one reminder from their healthcare provider, while 30% indicated that they like two reminders. This makes confirmation suppression an important capability to have within your reminders solution.



## Eroding Patient Satisfaction

While pivoting to telemedicine helped recoup some revenue from cancelled appointments, many health systems still suffered significant losses in cancelled surgeries, outpatient treatments, and emergency department services. The American Hospital Association estimates a total four-month (March through June 2020) financial impact of \$202.6 billion in losses for America’s hospitals and health systems, or an average of \$50.7 billion per month as a result of cancelled surgeries and outpatient treatment, and reduced emergency department services.<sup>1</sup>

### LATE OR MISSING COMMUNICATION

In addition to the immediate financial impact, health systems also experienced a drop in patient satisfaction during the pandemic – which does not bode well for patient loyalty and future revenue. In the survey, patient satisfaction fell 13% for provider communications when tracking those consumers who were “very satisfied” before and since COVID-19. For example, respondents cited a general lack of provider responsiveness to communications from patients. One respondent said their orthopedic surgeon took two to three days to respond to email communications.

Figure 5: Before COVID-19, how satisfied were you with the level of communication received from your primary healthcare provider(s)?



Figure 6: After COVID-19?



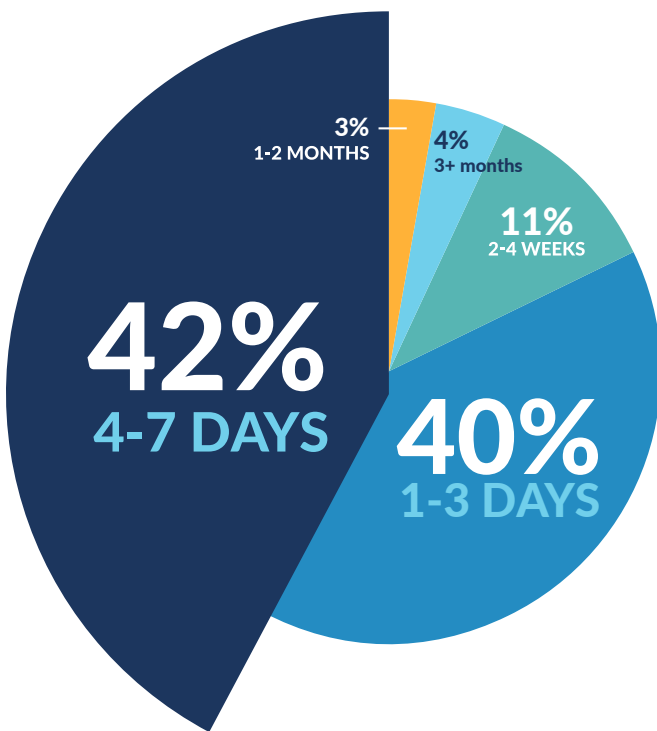
**“Providers should double down on communication during a health crisis, such as a pandemic, instead of pulling back or not communicating at all.”**

**Matt Dickson,**  
Vice President of  
Product and Strategy  
and GM of Stericycle  
Communication Solutions

## RUSHED APPOINTMENTS

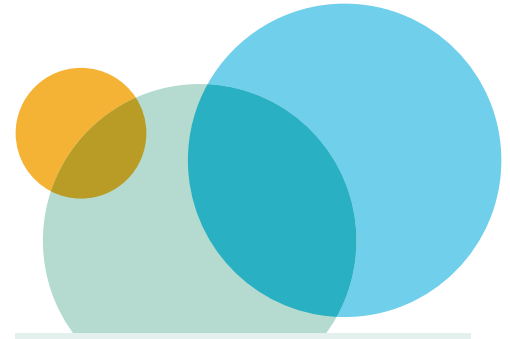
The disappointment doesn't end with provider communications. During the appointment itself, more than half of the respondents (54%) say they felt rushed, an increase of 35% compared to pre-COVID experiences. Qualitative statements from respondents shed light on why they felt rushed, with some stating that the provider did not spend adequate time examining them. Others believed that their provider made assumptions about what was wrong and the treatment needed without taking time to better understand.

Figure 7: When scheduling a non-emergency appointment, how long are you willing to wait before considering other care options?



## LIMITED PATIENCE FOR LACK OF AVAILABILITY

Another potential area of concern is whether health systems are losing patients because they can't provide appointments when patients want and need them. Most respondents (82%) are willing to wait up to seven days for non-emergency appointments before they look elsewhere for medical assistance. Anything longer than seven days and health systems risk losing patients to more responsive and available providers.



## Communication Channel Strategies May Be Too Limited

When asked whether their providers effectively communicated their COVID-19 policies and procedures prior to attending scheduled appointments, **63%** said yes.

The primary communication channel was

- Phone call **35%**
- Email **27%**
- Text message **24%**

**Only 5% received multichannel communications.**

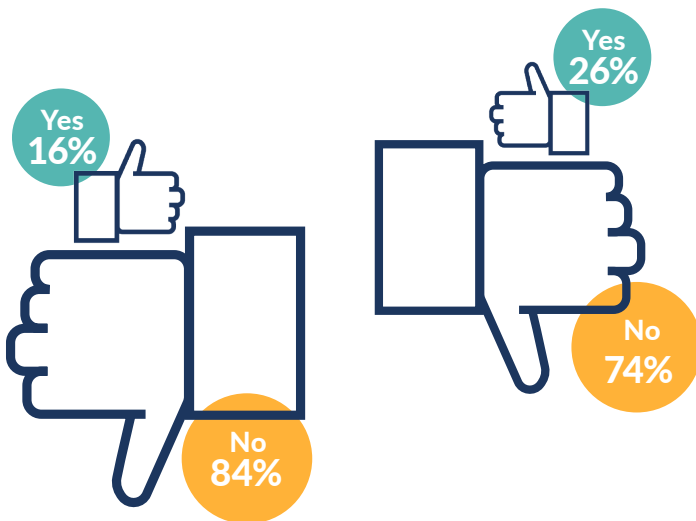
This represents an opportunity for providers to broaden their communication strategies to more effectively reach patients in their preferred channel.



## Increasing Mental Health Needs

The outbreak, ongoing economic uncertainties, and periods of lockdowns are taking their toll on mental health. Our survey shows that amid the pandemic, the number of consumers seeking mental health treatment grew by 10 percentage points, increasing from 16% of consumers pre-COVID-19 seeking mental health treatment to 26% who say they are seeking mental health treatment due to the effects of the pandemic, social inequality, and the U.S. presidential election.

1. *Figure 8:* Did you seek mental health treatment prior to 2020?
2. *Figure 9:* Have the events of the last several months including the pandemic, social inequality, and the U.S. election caused you to seek mental health treatment?



Without access to mental health services, healthcare professionals have raised concerns about a potential **MENTAL HEALTH EPIDEMIC.**<sup>2</sup>



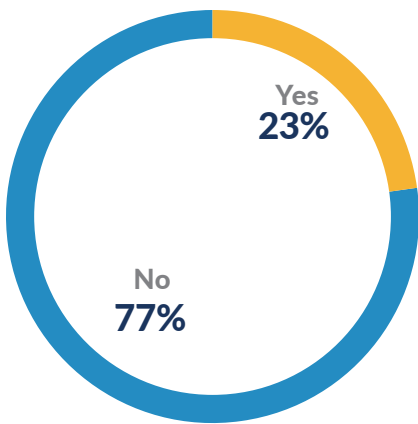
Consumers aged 35 to 54 made up nearly half of all people (47%) in the survey who said they sought out mental health treatment for issues related to the pandemic as well as events associated with social inequality and the election. Prior to the pandemic, older age groups (55 and older) made up the largest percentage (40%) of those seeking mental health treatment.

## THE IMPACT OF MISSED APPOINTMENTS

More troubling is the finding that nearly one-quarter of consumers (23%) missed their appointments with their healthcare providers due to their mental state. More than one-third (38%) of those who said they missed a healthcare appointment due to their mental health had sought out treatment due to the pandemic, social inequality, and the election.

A study in 2019 showed that patients with mental health conditions who missed more than two appointments per year had a greater than eight-fold increase in risk of all-cause mortality compared with those who missed no appointments.<sup>3</sup> For these patients, it's a life-threatening situation when communication and reminder efforts fail to engage and encourage action.

Figure 10: In the last year, did you miss a scheduled appointment with your provider due to your mental health?



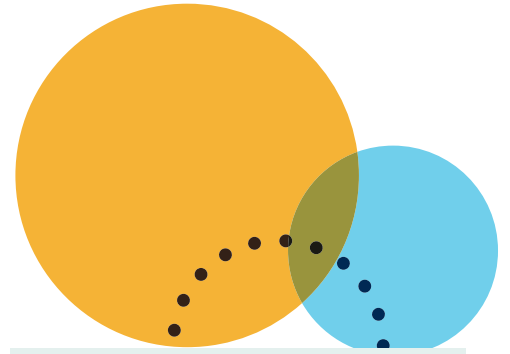
**38%**

of these same respondents had also sought mental health treatment in the last several months due to the pandemic, social inequality, and the election



**60%**

of those consumers who missed an appointment due to their mental health were able to reschedule



## COVID Limits Access to Mental Health Treatment

The World Health Organization (WHO) reports that the impact of COVID-19 on healthcare services disrupted access to mental healthcare services.

According to the WHO, primary causes were infection and the risk of infection in long-stay facilities such as care homes and psychiatric institutions, barriers to meeting people face-to-face, mental health staff being infected with the virus, and the closing of mental health facilities to convert them into care facilities for people with COVID-19.<sup>4</sup>

## What These Findings Mean for Your Health System

The findings show that focusing on patient engagement and experience are more important than ever for health systems looking to recoup lost revenue, reduce churn, attract new patients, and improve patient adherence to care plans.

To emerge stronger, health systems must regain the trust of patients, re-establish and prioritize communication with patients in their preferred channel, and help healthcare consumers adapt and succeed with both digital and in-person experiences.

### HERE'S HOW:



**Reassure** patients and assuage fears of contracting COVID-19 while receiving care by offering contactless experiences, from online self-scheduling to virtual waiting rooms and online check-in.



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



**Improve communication** and patient satisfaction with multichannel strategies that combine automated text, email, professional recorded voice, and live agent messages, as well as dedicated hotlines for patient, caregiver, and staff questions.



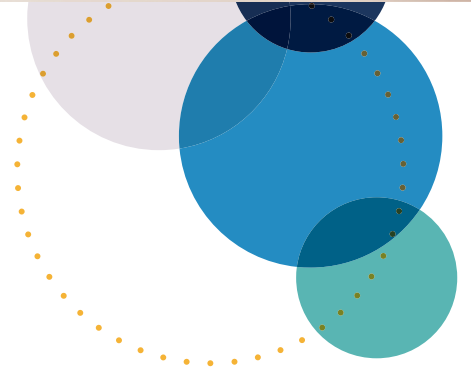
**Drive immediacy** for appointments and prevent patients switching to another health system by making scheduling convenient and easy with live voice scheduling and self-scheduling across all care venues, including emergency, urgent care, physicians, specialists, and telehealth.



**Help** mental health patients adhere to appointments and treatment plans by personalizing and optimizing patient engagement with customized communications that reduce no-show and cancellations.



**Execute** a successful vaccine program with a HIPAA-compliant solution that supports scheduling, reminders, hotlines, and follow-up.

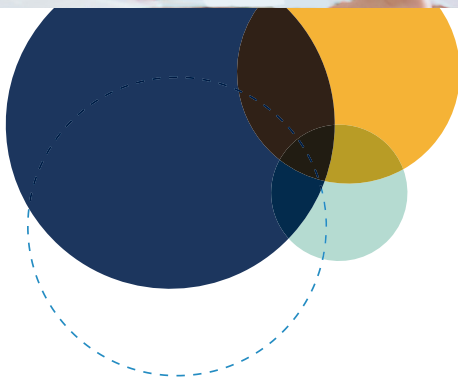


## About the Survey

The inaugural Stericycle Communication Solutions U.S. Consumer Trends in Patient Engagement survey included more than 500 consumers across all 50 states to understand their healthcare experiences in 2020 and the impact of COVID-19 on those experiences. The 20-minute survey was conducted primarily with outbound calls (68%) and online surveys (32%) during the month of November 2020, a pivotal moment in time when consumers across the country were faced with unprecedented challenges related to the global COVID-19 pandemic. Survey respondents included a generally representative distribution of age, household income, marital status, and geographic regions.



EVENTS OF THE  
LAST 12 MONTHS,  
HAVE FOREVER  
**CHANGED**  
HEALTHCARE AND  
COMMUNICATIONS.



# 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: "Hospitals and Health Systems Face Unprecedented Financial Pressures Due to COVID-19,"  
American Hospital Association, May 2020

2: "Mental Health Is the Next Pandemic" Global Med, May 2020

3: "Morbidity, Mortality and Missed Appointments in Healthcare: A National Retrospective Data Linkage Study,"  
Ross McQueenie, David A Ellis, Alex McConnachie, Philip Wilson, Andrea E Williamson, PubMed.gov, Jan 2019

4: "World Mental Health Day: An Opportunity to Kick-Start a Massive Scale-Up in Investment in Mental Health,"  
The World Health Organization, United for Global Mental Health, & the World Federation for Mental Health, Aug 2020