

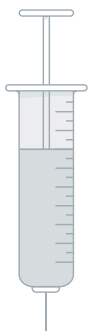
# Measuring Patient Sentiment in the Face of COVID-19

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# Measuring Patient Sentiment in the Face of COVID-19

## Key Takeaways and Reactions from the Avtex National Survey

COVID-19 has transformed the way patients think about the healthcare industry, as well as their approach to taking care of their own individual health needs. In March, when the pandemic hit, health systems around the nation stopped performing elective procedures to ensure hospitals had enough capacity to treat COVID-19 patients. To protect staff and patients, outpatient clinics put cautionary procedures in place, delaying routine appointments for weeks or months.



# 70%

of healthcare providers are “extremely concerned” or “moderately concerned” about their financial viability until an effective treatment or vaccine is available<sup>2</sup>

When providers began to return to standard operating procedures, many of their patients did not come rushing back as expected. Instead, providers quickly discovered that many patients had opted to continue socially distancing and delaying appointments. This seems to be the case for patients seeking a wide range of treatment types, including elective, preventive, specialty, emergency and mental care.

The recent spike in COVID cases has forced providers to scale back or postpone elective procedures again<sup>1</sup>. No provider is unaffected including Cleveland Clinic, Mayo Clinic and Advocate Aurora. Mayo Clinic recently released a public statement announcing they are “temporarily deferring some elective care so that we can care for the surge of urgent and emergent needs for our community, including the high influx of COVID-19 positive patients needing hospital care.”

Citing a significant increase in COVID-19 hospitalizations, Cleveland Clinic said it will postpone nonemergency surgeries. “Patient and caregiver safety is our top priority, and this decision will preserve hospital beds and supplies to ensure all patients have an optimal experience,” according to a Cleveland Clinic news release.

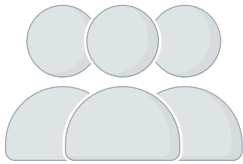
These measures will once again impact the health system’s bottom line. According to recent surveys, 70% of healthcare providers are “extremely concerned” or “moderately concerned” about their financial viability until an effective treatment or vaccine is available<sup>2</sup>. In November, Allina Health announced<sup>3</sup> a net loss of \$153.7 million through first three quarters of 2020, compared to net income of \$142.4 million in the same period a year earlier. This grim news is not unique to Allina – the numbers across the industry are staggering.

1. *Becker's Hospital Review: 53 hospitals postponing elective procedures amid the COVID-19 resurgence*
2. *Kaufman Hall: Survey: Three-Fourths of Hospital Executives Concerned About Financial Viability Without Effective COVID-19 Treatment or Vaccine*
3. *Becker's Hospital CFO Report: Allina Health loss grows to \$154M over 9 months*

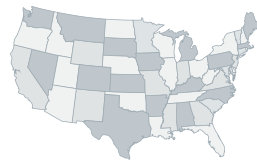
Through July of 2020, preventive treatments like mammograms and colonoscopies were down 87% and 90% respectively<sup>4</sup> from their pre-COVID levels. These are procedures designed to detect early signs of cancer. If patients are not getting the screenings they need, it is only logical to expect patients to be sicker when they return to healthcare. This will put a greater financial burden on the health system and patients at risk.

To uncover “the why” behind this delayed return and provide healthcare providers with key insights to help them improve the healthcare experience for the COVID-19-impacted world, Avtex conducted a survey of more than 1,000 patients. The survey was designed to uncover the key factors influencing patient sentiment and desired provider practices, and to identify actionable insights that may help healthcare organizations jumpstart their businesses.

The survey, commissioned by Avtex, includes the following key parameters:



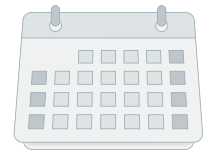
Sample modeled after the general U.S. population



n = 1,048 respondents nationwide

3%

Margin of error = 3%



Data collected July 20, 2020 to August 12, 2020

## Many Factors Impact Patient Sentiment About Returning to Regular Health Care

According to surveyed patients, many are open to returning because they trust their care team. In fact, 85% agreed with the statement: “Overall, I trust my healthcare providers to create and enforce safety measures that will keep me safe.”

Yet, despite the large percentage of patients indicating they trust their providers to offer the necessary protection, over half of those surveyed said they would wait three to six months before actually seeking care.

Patient comfort level with returning was found to be dependent on several factors, with the most notable factors being care type and location, patient age and patient education level.

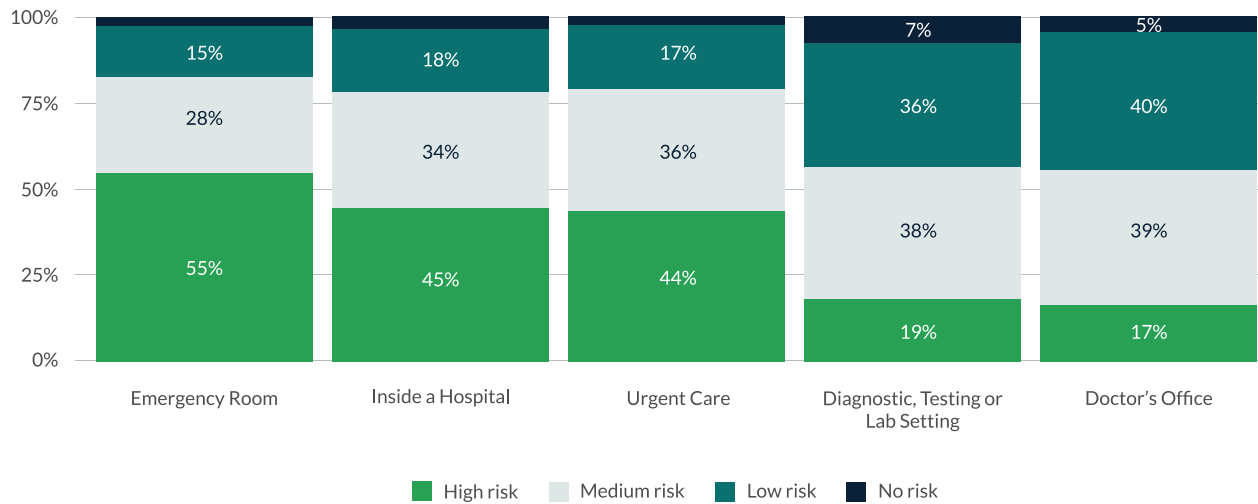
### Health Care Type and Location Influences Perceived Risk

The type of care in question and the physical location of care delivery had the most impact on survey respondents’ comfort level with seeking treatment. Emergency rooms were

4. *The IQVIA Institute: Shifts in Healthcare Demand, Delivery, and Care During the COVID-19 Era*

overwhelmingly perceived as the riskiest location to receive health care, with 83% saying it had a risk level of Medium or higher, while visits to a clinic saw the lowest risk level with 56% saying they viewed clinics at a Medium or higher risk level.

### Patient Risk Perceptions by Health Care Location



One survey participant shared:



*“The idea of visiting a doctor’s office or a hospital makes me extremely nervous. Given the sheer number of COVID-19 cases in the United States, those seem like some of the most likely environments to pick up the virus. I am very concerned about bringing the virus home to my parents who are both high risk due to their age.”*

**MALE, 25-34 YEARS OLD**

This sentiment is shared by many patients and has helped drive providers to explore other ways and channels to meet patient needs, including virtual visits and at home services. One care provider converted cargo vans into mobile labs and drove to patient homes to perform lab draws.

Of those surveyed, 69% of patients are interested in regular, at home check-ins with their doctors. In addition to patient concerns, the increase in distance learning, working from home and general caretaking duties, it is more difficult to take the time necessary to proactively take care of their health – both physical and mental. As a result, personal health care often falls near the bottom of the list.

## Age Plays a Defining Factor in Willingness to Return to Healthcare Settings

According to the survey results, age plays a significant role in patient sentiment towards seeking care during the ongoing pandemic.

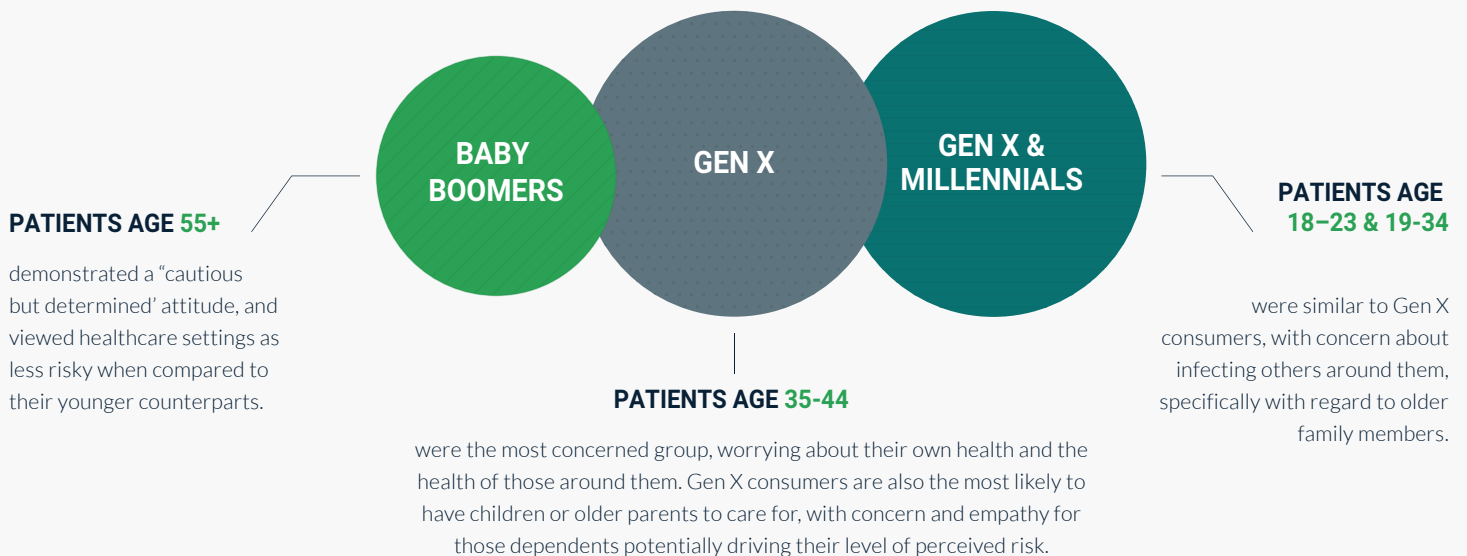
The age of patients surveyed impacted a number of sentiments, including:

- Level of concern around COVID-19
- Likelihood to go back to a healthcare setting in the near future with/without a vaccine
- Ranking of the riskiest healthcare settings
- Openness to telehealth options
- Requirements for safety procedures and practices needed from healthcare providers

This survey defines generational groupings based on widely used terms: Baby Boomers, Generation X, Generation Z and Millennials.

### The Impact of Age on Uncertainty

Even in optimal circumstances, many patients are emotionally driven when considering their health care options. With the continuation of COVID-19, we see that fear, concern and uncertainty as persistent factors for patients.



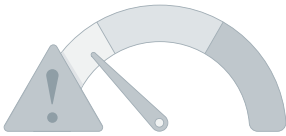
## Generation-Specific Sentiments

Sentiment varied across age ranges, with each generation offering their own unique perspective on health care visits.

### ■ Baby Boomers

Throughout the survey, Baby Boomers – the group most likely to need to go to the doctor for various healthcare services – consistently demonstrated a “cautious but determined” attitude.

On average, Baby Boomers:



Viewed healthcare settings as less risky than younger counterparts



Demanded higher level of safety precautions



Welcomed telehealth, with 3 in 4 being open to it, though only 1 in 3 preferred it



Need additional reassurance that their providers understand their predicament and are working with them

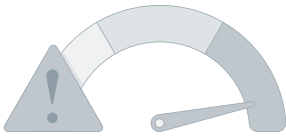
The survey results also identified some of the factors that Baby Boomers need or expect from providers in order to return to the health care setting. According to the survey, Baby Boomers need their providers to:

- ✓ Be an authoritative source of health information (e.g. educate about possibilities and realities for a COVID-19 vaccine)
- ✓ Implement preventative precautions, and tell these patients you are taking the following, which are most important to this group:
  - ✓ Requiring staff, patients and visitors to wear masks or face coverings
  - ✓ Disinfecting surfaces between patients
  - ✓ Taking temperatures
- ✓ Reassure them they will be able to see their doctor in the safest and most appropriate way possible, as their preference is to “see my doctor(s) in person as much as possible”
- ✓ Offer them options to make appointments easier (e.g. electronic check-in)

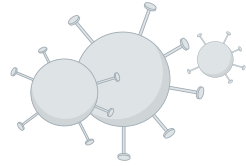
## Generation X

Generation X patients demonstrated significant healthcare needs, being the most likely to visit a provider once per month or more before COVID-19 began. Respondents age 35-44 were the group most concerned about COVID's impact – on their own health, and the health of those around them – and they voiced a need for diverse options when it comes to telehealth.

On average, Gen X respondents:



Were the most concerned about COVID-19 risk and need reassurance



Fear impact of COVID-19 on their own health and health of those around them



Feel most strongly a vaccine will impact decision to return to healthcare settings



Gravitated towards video (vs. phone or other telehealth options)

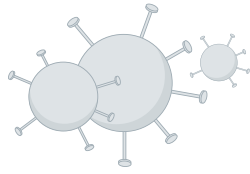
To comfortably return to the healthcare setting, Gen X respondents expect:

- ✓ Accurate information about protecting themselves and their families
- ✓ Aware of protective procedures in place in healthcare settings
- ✓ Reassurance about efforts to minimize risk of COVID-19
- ✓ Options for telehealth

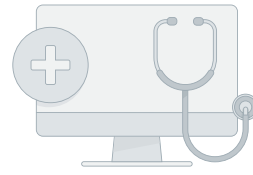
## Millennials and Generation Z

Millennial and Gen Z patients offered similar responses to Gen X patients, both in their sentiments and in their needs. However, research shows that these younger consumers age 18-34 are more likely to have higher standards when it came to technology usability, personalization and holistic care. The diversity of healthcare experience needs within this age segment warrants attention from providers, with a wide range of experiences being needed to reassure them.

On average, Millennial and Gen Z respondents:



Fear the impact of COVID-19 on their own health and health of those around them



Are very open to telehealth, with 60% preferring it



Have higher telehealth standards and less patience than Gen X counterparts and are more concerned about "connection problems or the inability to see or hear consistently" during virtual appointments

In order to return to the healthcare setting, Millennial and Gen Z respondents expect:

- ✓ Accurate information about protecting themselves and their families
- ✓ High-quality technological telehealth experience

### Patient Education's Impact on Sentiment

The results of the survey suggest that a patient's level of education plays a key role in their sentiment toward returning to the health care setting.

The following patient sentiment trends were identified in surveyed patients with education as the key factor:

- College-educated patients perceived the highest risk compared to others at the ER, urgent care and at clinician offices
- Post-grad patients were the most likely to be concerned about infecting others with COVID-19 unknowingly, with 29% voicing a high level of concern
- Post-grad patients were the most likely to have seen a provider (67%), and half (47%) of these respondents had done a video telehealth session
- Patients with more education were more likely to have used some form of telehealth, with 37% of post-graduate patients using that service versus 27% of college graduate patients and 19% of patients that don't hold college degrees



When it comes to the protective measures by providers, educated respondents (post-grad) were also most likely to see the following as important:

- ✓ Sending communications to patients describing safety procedures, with 41% of post-grads stating they would not visit a provider in-person without this
- ✓ Regularly testing all staff for COVID-19
- ✓ Not requiring patients to sit in a waiting room
- ✓ Having social distancing in the waiting room
- ✓ Requiring staff, patients and visitors to wear masks or face coverings
- ✓ Disinfecting surfaces between patients
- ✓ Taking the temperatures of staff before they begin working
- ✓ Doing a pre-visit screening for COVID-19, such as a phone call prior to appointments asking about recent travel and health status
- ✓ Doing pre-procedure testing for COVID-19

Overall, the more educated a survey respondent was, the more concerned they were about the risks associated with COVID. However, those same patients remained likely to seek healthcare, either via telehealth or in-person visits.

## **Patient Expectations During COVID-19**

COVID-19 stole patients' sense of safety. To help better understand what patients need to feel protected and comfortable going back to their clinician again, the survey asked respondents asked patients about the most important steps their providers can do to put them at ease.

Actively putting precautions in place was the most important factor, as well as the expectations of patients around masks, disinfecting, PPE, social distancing and screening based on temperature and symptoms.

When asked what providers can do to make them feel more comfortable with in-person visits, the responses included:



*Assure clinic and exam room space is sanitized and that there is no risk.*

**MALE, 18-24 YEARS OLD**

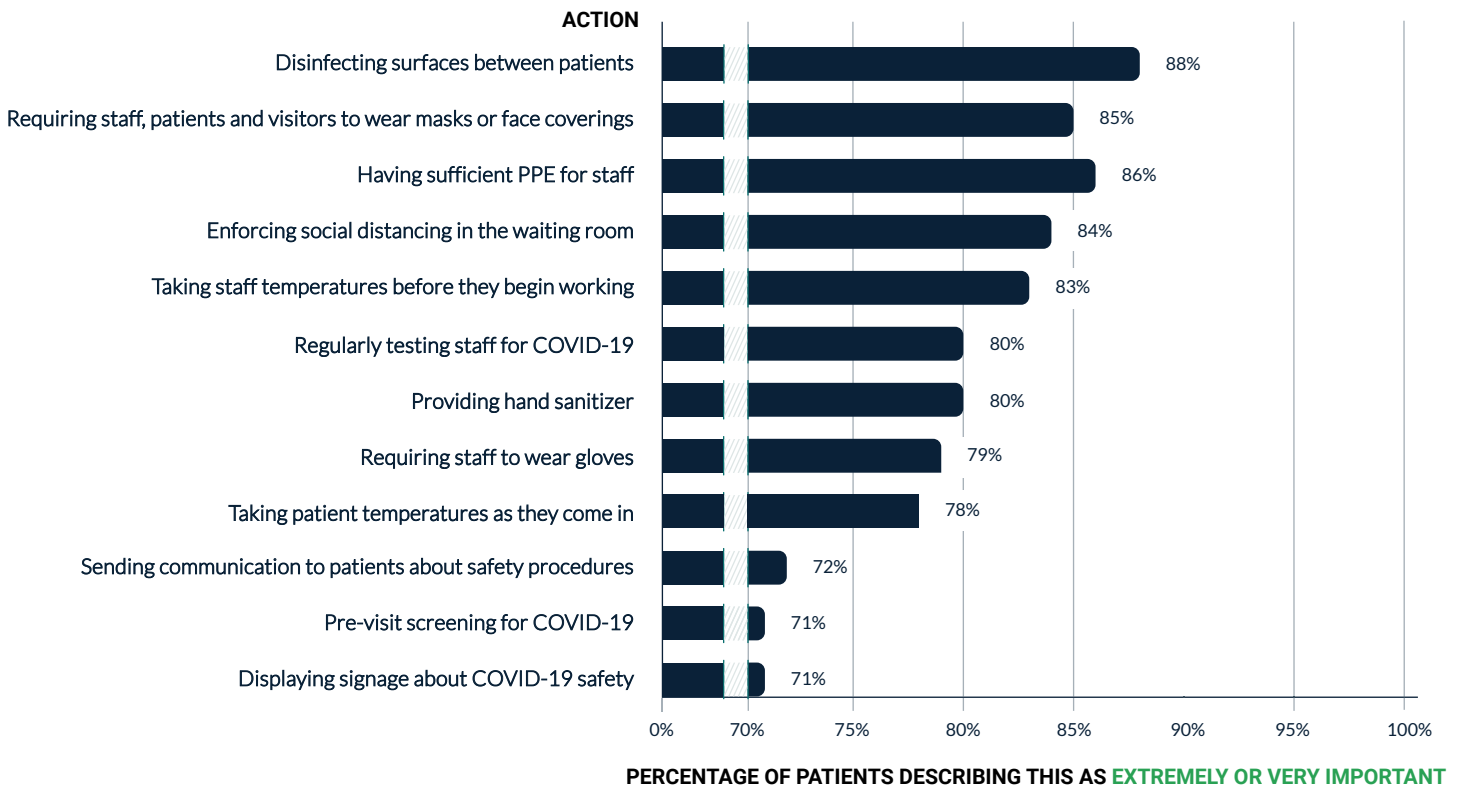
*Allow me to go into the office when the doctor is actually ready for me and let me wait in my car until then.*

**FEMALE, 65+ YEARS OLD**

*Clean after each appointment, wash hands frequently, have hand sanitizer present, have a mask on regardless of what you are doing, and don't contaminate objects you already cleaned from the previous patient.*

**MALE, 18-24 YEARS OLD**

Across the survey data, the following actions were described by patients as the most important things providers can do to make sure they feel safe and secure:



As the survey results show, the most important actions to consumers are disinfecting surfaces and requiring masks, but patient communication and messaging also stood out as an easy, low-cost way for providers and health systems to raise patient confidence about returning for in-person care.

### **The Expectation of Increased Communication**

With the uncertainty around COVID-19, patients have come to desire more frequent communication from their healthcare providers, especially before an appointment. According to the survey results 31% of consumers won't go to a provider without receiving communications describing safety procedures, with 72% of respondents stating that communication from their provider is either "extremely" or "very" important.

Therefore, it is essential that providers develop patient engagement messaging, signage and communication that addresses the safety concerns highlighted above.

## **Key Takeaways that Can Help Healthcare Providers Reactivate Patients**

The results of the Avtex 2020 Patient Sentiment Survey provide an interesting view into current perception of the healthcare industry and patients' willingness to seek care during the COVID-19 pandemic. The responses also provide valuable insight into the strategies and steps healthcare providers should explore to re-engage their patients and accelerate revenue recovery. More than anything, these results demonstrate the real need for healthcare providers to take immediate action to reactivate patients.

Before exploring potential reactivation strategies, it is important to note that despite its extensive impact, COVID-19 is not the sole cause of the evolving expectations of patients. In fact, it is more accurate to say the pandemic simply expedited an evolution of the healthcare experience that was already underway, thanks to the introduction of telehealth and shifting consumer mindsets.

This means that any steps you take to meet your patients' needs today will likely have long-term benefit even after the current crisis has ended.

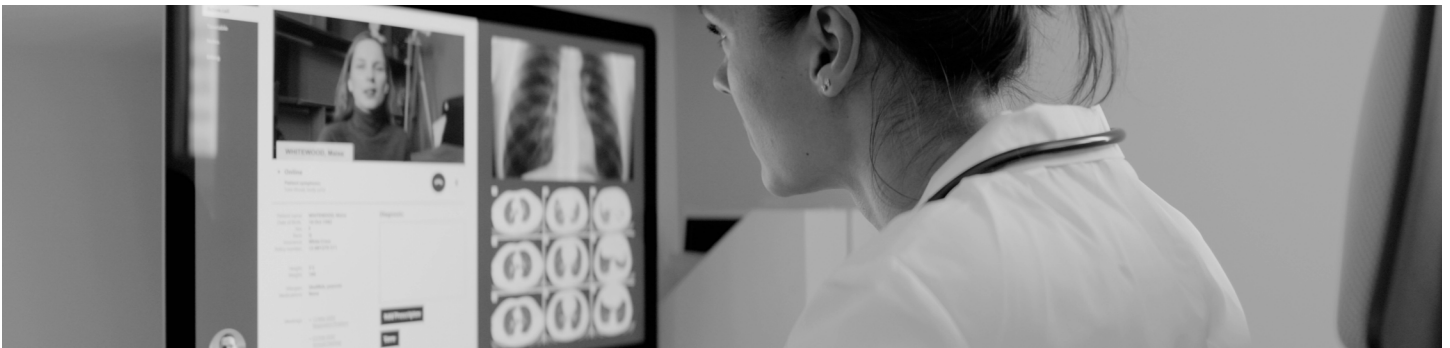
### **Focus on Delivering Personalized Experiences**

The results of the survey clearly demonstrate that patients, especially those of different ages and education levels, expect different things from their care providers. This means that boilerplate communication and experiences will likely not put your patients at ease during this trying time.

Instead, it is important to personalize your communication to each patient segment, and to each individual patient if possible. The more you tailor your messaging and interactions to your patients' unique needs, the more likely they are to feel valued, reassured and willing to seek care at your facility. These sentiments are crucial to patient reactivation and jumpstarting your operations.

Patient relationship data plays a vital role in personalization – without accurate, detailed and accessible data, it is all but impossible to effectively tailor communication or experiences. Patients want the companies they engage to use all of the data available to deliver an exceptional experience. Relying solely on information housed within an EMR platform leaves a significant gap. Many of these “core” systems contain incomplete contact information (phone, email, social media, etc.) for more than 50% of their patients. An effective CRM solution working in tandem with the EMR solution is necessary to create a more complete patient record. If you haven't already, review the effectiveness of your CRM and marketing automation solutions to ensure they are up to the task of supporting personalization.

It is also important to offer your patients a range of options to engage with your organization and let them make their own decisions regarding how they will seek care or information. Multichannel communication is critical to empowering your patients – offering options for managing appointments or obtaining information allows individuals to tailor their experience directly to their own preferences.



## **Increase Communication Frequency, Clarity and Channels**

To put patients at ease, and to simplify the care process, healthcare providers should look to evolve their patient communication strategy to include more frequent messages, non-appointment specific topics and overall health awareness. Communication should not just happen during each episode, but year-round. Healthcare providers should take a cue from leading retail brands like Amazon or Target who continually communicate with their customers and provide ongoing updates regarding new service offerings, sales or product availability. Remember, patients have many choices for healthcare, and as a result, providers need to create positive emotional ties to keep their current patients as well as earn new ones.

There are many messaging tactics that can help to improve patient confidence and create stronger provider-patient relationships, including:

The more timely and relevant communication you offer your patients, the more likely they are to trust you with their care needs even in the face of the pandemic.

- Educating patients with more frequent communications, including information and tips for protecting themselves and their families, COVID-19 updates, and real time information about any changes to procedures, practice protocols, staff and other patient-interfacing details
- Explaining the efforts being taken to minimize the risk of COVID-19
- Describing safety procedures in place and how to navigate them before appointments and on-going as practices are updated
- Offering options to make appointments easier (e.g. electronic check-in)
- Providing pre-appointment and post-appointment messages to help create a caring atmosphere and trust

## **Remap Your Patients' Journeys**

The paths your patients take to interact with your organization have shifted dramatically since the start of the COVID-19 pandemic. With new needs and concerns to consider – and potentially fewer options to explore – patients are engaging with healthcare providers in completely different ways than they were just six months ago.

Every patient journey has changed due to COVID – the pandemic has fundamentally changed patients' expectations and the ways they engage healthcare. Patients no longer are willing to wait in hospital or clinic waiting rooms. They don't want to touch kiosks or clip boards. They are more willing to embrace technology if it streamlines the experience and they perceive it will keep them safer.

With that in mind, it is important to take the time to chart the current patient journey and adjust your processes, policies and tools to accommodate these new pathways.

## **Make it Easy for Patients to Do Business with You**

Frustration is heightened during a crisis – patients who encounter challenges when trying to interact with your organization are more likely to abandon the effort or form a negative opinion of your brand. With that in mind, it is crucial to make it as easy as possible for your patients to do business with you.

Carefully examine every potential interaction your patients may have with you. Identify any steps in the interaction that are not absolutely necessary and eliminate them. Brainstorm new strategies for improving the interaction and reducing the opportunity for patient frustration. Communicate any changes to ensure patient awareness.

Make the same effort for your employees. Review your internal processes and tools to identify any potential pain points or roadblocks that may negatively impact your employees. Survey your employees to determine if they have the tools, information and support necessary to do their jobs safely and efficiently. The easier it is for your employees to do their jobs, the easier it becomes for patients to do business with you.

When reviewing interactions for improvement opportunities, consider integrating key systems, such as your EMR and CRM, or your EMR and a patient-facing portal. These types of integrations enable patients to access additional self-service capabilities, including bill pay or appointment scheduling through multiple channels, while also allowing your employees to access patient data in real time during interactions.



## **Invest in Telehealth Solutions**

Virtual visits are quickly becoming one of the most popular forms of health care, even before the pandemic. Telehealth visits have proven effective at increasing patient satisfaction and reducing operational costs. During the current pandemic, where close physical contact is considered risky, telehealth solutions are quickly becoming a vital part of business for many healthcare providers.

If your organization hasn't expanded telehealth options to all clinical teams, it is time to do so. At the same time, it is important to consider home care delivery options for those patients requiring in-person treatment. Delivering virtual or in-home care will be a critical part of the success of healthcare providers both during the pandemic and long after the crisis is over.

Invest in high-quality technology to reduce connection issues. Teach staff how to use telehealth tools, and how to provide personalized care via virtual appointments. Customize patient learning tools about telehealth, based on technological fluency. Provide personal, step-by-step walkthroughs of video telehealth systems, and review patient experiences with telehealth at their next in-person appointment. Communicate clearly to patients about the accuracy of telehealth-based diagnosis, and the types of care they should expect to receive via virtual appointments.

Telemedicine, virtual offerings and digital technology must be front and center so consumers remain informed on the best ways to access care, and as a result, how we leverage our technology stack is critical. Of course, simply offering virtual visit options isn't enough. It is also important to provide an effective experience before, during and after. Your solutions must become a natural part of the care process, with seamless transitions from the virtual channel to post-care instructions and follow-up appointment scheduling.

## Address Your Patients' Emotional Needs

If the results of the survey tell us anything, it is that patients are very worried and concerned about the safety of seeking care during the pandemic. This is especially true for patients who have family members with underlying conditions, or patients dealing with underlying conditions themselves. During a crisis, these emotions are magnified. Mental health is dramatically impacted by the anxiety and social isolation associated with a pandemic. According to the CDC<sup>5</sup>, elevated levels of adverse mental health conditions, substance use, and suicidal ideation were reported by adults in the United States in June 2020. The prevalence of symptoms of anxiety disorder was approximately three times those reported in the second quarter of 2019 (25.5% versus 8.1%), and prevalence of depressive disorder was approximately four times that reported in the second quarter of 2019 (24.3% versus 6.5%<sup>5</sup>).

It is important to take the time to acknowledge your patients' fears and concerns, and to reassure them that steps are being taken to address them. The more time and effort you invest into putting patients at ease, the less they will have to worry about when exploring their care options.

## Avtex is Here to Offer Support

As an end-to-end CX consulting firm with a dedicated healthcare team, Avtex is uniquely suited to help healthcare organizations overcome the challenges associated with patient and member engagement. Our experts are here to provide the support and advice you need to understand your patients' needs and expectations and to explore new strategies and technology solutions to meet them.

5. *Centers for Disease Control and Prevention: Mental Health, Substance Use, and Suicidal Ideation During the COVID-19 Pandemic – United States, June 24–30, 2020*

## About Avtex

Avtex is a full-service Customer Experience (CX) consulting and solution provider focused on helping organizations create better experiences for their customers. With an unparalleled breadth of knowledge and experience, and partnerships with leading technology vendors like Microsoft and Genesys, we are uniquely suited to address any CX challenge.

Our portfolio of solutions and services supports our unique approach to Customer Experience, which includes two key phases to achieving CX Transformation.

- Our **CX Design** solutions and services aid in the process of defining and improving CX. From journey mapping to CX design thinking, we provide the support you need to set the foundation for CX success.
- Our **CX Orchestration** solutions and services enable the realization of your CX strategy through people, processes and technology. From technology implementation to training, we ensure you have the capabilities to execute your CX strategy.