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Communication Solutions

Understanding Patients' Needs for Access & Convenience in Today's World

WHITE PAPER | PATIENT ENGAGEMENT

2022 Stericycle Communication Solutions U.S. Consumer Trends in Patient Engagement Survey

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Introduction: How the Last 12 Months Have Affected Patient Preferences

Healthcare has undergone a tremendous shift since our first survey in 2020. Healthcare consumers have more choices than ever when it comes to obtaining medical care, and the landscape of care offerings has dramatically changed compared to pre-pandemic behaviors. Now options such as virtual care, retail care, and other non-traditional healthcare options are common. But in our deep look into patient preferences and choices, it's clear that the role of the telephone still holds an important place in patient-to-provider communications.

Our third annual survey, focused on the responses of 1,004 U.S. adults, shows that younger adults are emerging as a population that engages in their healthcare journeys in very specific ways, including seeking care at non-traditional venues such as retail health clinics, obtaining mental health treatment, and taking advantage of care options such as home health care. These digital natives are undoubtedly a group to watch as they consume healthcare on their own terms and will continue to do so, setting the stage for a future driven by their preferences.

Our findings also reveal unique insights into the sentiment of today's healthcare consumer, and we've uncovered what current patient preferences are when it comes to engaging with medical care and providers. A staggering 93% of respondents had an in-person visit at their most recent primary care physician (PCP) appointment, and 44% preferred in -person visits with all providers. This data indicates patients value human-to-human encounters. In the last year however, nearly half (45%) of adults surveyed used telehealth at least once, with younger adults between the ages of 18 to 34 much more likely (61%) to have used telehealth. With both telehealth companies and retail health locations opening for business at a rapid pace, it remains to be seen which option will have longevity.

Our third annual U.S. patient engagement survey focused on the responses of

1,004 adults.

OUR FINDINGS REVEAL UNIQUE INSIGHTS INTO THE SENTIMENT OF TODAY'S HEALTHCARE CONSUMER.

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People are Mostly Keeping Up with Their Physical Health Care

BUT DELAYED CARE PERSISTS

Most adults surveyed (86%) have had a primary care physician (PCP) visit in the last year, with 45% within the last one to three months, showing an uptick in reversing the delayed care trend. When it comes to respondents' most recent PCP visit, 93% were in person. As the world has opened back up, so has in-person care, pointing to the need for medical providers to offer high levels of in-office care as well as hybrid care solutions.

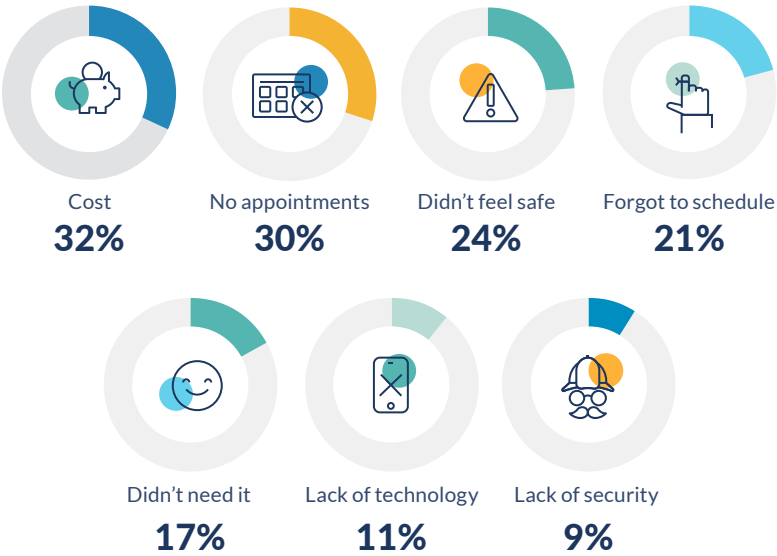
However, while overall 31% of adults surveyed have delayed care in the last year, 50% of 18- to 34-year-olds have delayed their care, compared to just 16% of those 55 and older. The top reason stated for delaying care was to avoid medical expenses, particularly important to the 35% of respondents aged 18 to 34. It's not surprising that older adults who may have chronic conditions and more complex needs are not delaying care as frequently as before.[1]

Other reasons stated for delaying care in the last year included no appointments being available (30%), not feeling safe receiving care in person (24%), and forgetting to schedule an appointment (21%). Notably, 31% of men and just 13% of women said they forgot to schedule an appointment.

When it comes to respondents' most recent PCP visit,

93%
WERE IN PERSON.

Why did you delay receiving care?



LOYALTY DECREASES AMONG YOUNGER RESPONDENTS

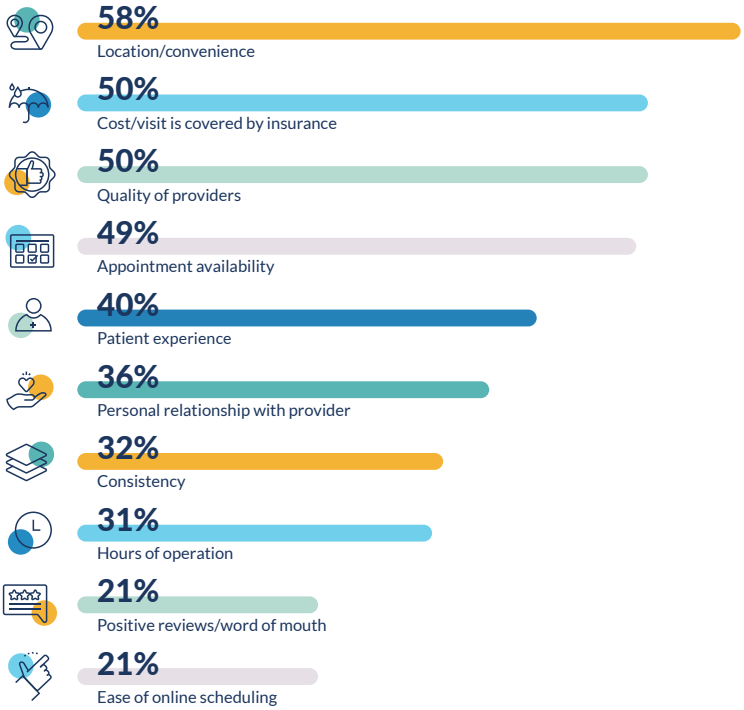
Nearly 90% of survey respondents reported mostly or always sticking with the same practice or PCP for routine care. This trend is strongly influenced by the age of the respondent. For those 55 and over, 95% reported sticking with the same PCP. Among 18- to 34-year-olds, that number drops to 82%, showing that younger adults are less loyal to their provider and more likely to consider an alternative.

LOCATION, LOCATION, LOCATION

When it comes to non-urgent care, location/convenience was the most common consideration regardless of gender or age. Other top factors in choosing non-urgent care include cost/visit is covered by insurance (50%), quality of providers (50%), appointment availability (49%), patient experience (40%), and personable relationship with the provider (36%). Generational differences were apparent among other reasons, including younger adults valuing the ease of online scheduling (33% vs. 11% for those 55 and over) and positive reviews/word of mouth (32% vs. 13% for those 55 and over). On the flip side, a personal relationship is more important for those 55 and older (49%), compared to 24% of those 18- to 34-years-old. And overall, females (40%) value a personal relationship with a provider more than males (31%).

of survey respondents **say a provider who accepts their insurance** is an important factor in provider choice.

What factors do you consider when choosing non-urgent care?



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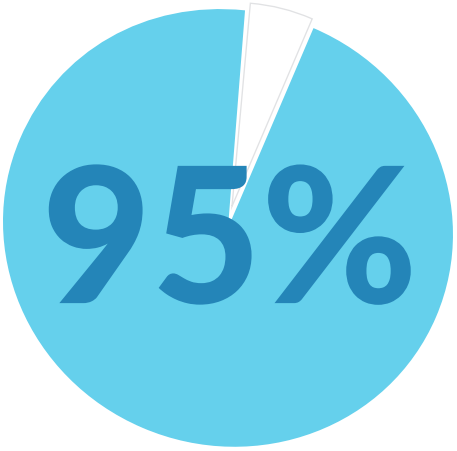
How Healthcare Consumers Feel About the Emergence of Non-Traditional Care Venues

In today's world, there are a multitude of locations for patients to seek care outside of the traditional PCP office. These include:

- Retail locations such CVS, Target, Walgreens, and Walmart
- Virtual care outside of the patient's PCP such as Teladoc Health or Amwell
- App-based care such as BetterHelp or Talkspace
- Subscription/membership-based care such as One Medical

Overall, 45% of respondents have received care at a non-traditional care venue, and 81% of those respondents received it in the last year. Among those that have not pursued a non-traditional care venue for healthcare, 42% indicated that they did not need medical care, while 24% noted that they had a long-standing relationship with another provider. Interestingly, a third of all younger adults pursued non-traditional care due to having difficulty scheduling an appointment with their preferred health system.

Additionally, a staggering 95% of those who had pursued non-traditional care indicated they would visit again in the future. It's also important to note, though, that 41% of respondents indicated that their healthcare experience at a non-traditional care venue felt disjointed from the rest of their medical care, an indication that certain medical needs are best addressed within the hospital or health system to ensure a cohesive patient journey. Connecting patients with the right venue of care at the right time is paramount and impacts outcomes, satisfaction, and healthcare costs, among others.



of patients who received care at a non-traditional setting said they **do** intend to visit again in the future.

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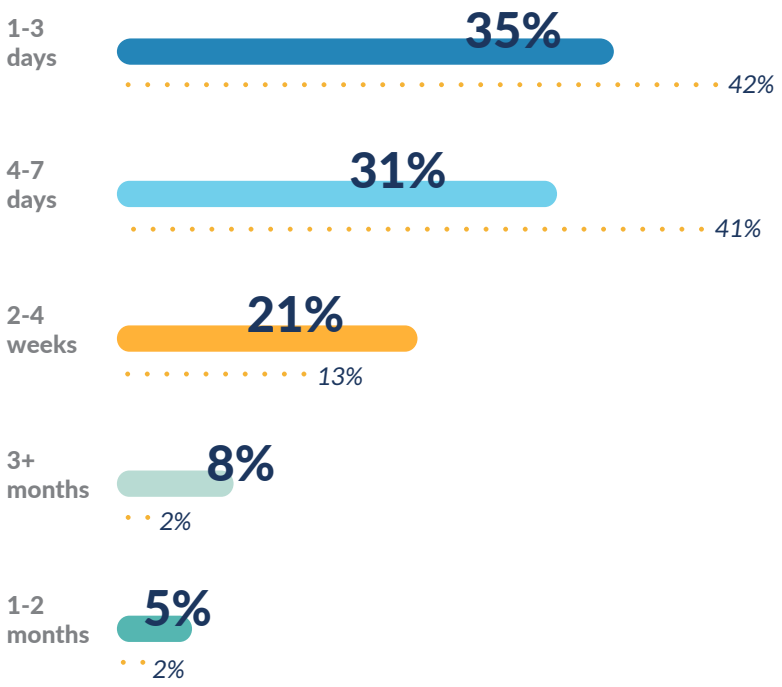
Of note, if a patient feels as though they are not satisfied with their primary care physician, whether they have trouble getting ahold of them, have to wait for an available appointment, or feel their medical needs aren't met, they could be enticed to seek care elsewhere. Below is a breakdown of how long the healthcare consumers surveyed are willing to wait for a non-emergency appointment before considering other options. It's apparent that healthcare consumers are increasingly less likely to wait for an appointment before seeking alternatives.

How long are you willing to wait for a non-emergency appointment before considering other options?



····· *2021 Survey Findings*

For those seeking non-traditional care, the survey revealed that a retail location is the most common venue of care (51%), followed by virtual care (34%), care via an app (11%), and subscription/membership-based care (5%).

Our findings also show some stark differences among age groups. Younger adults (18 to 34) were more likely to have received care at a non-traditional venue (56%), compared to adults 55 and older (33%). A much higher percentage of younger adults (63%) believe a non-traditional retail environment is just as good as a dedicated healthcare provider, compared to 30% of those 55 and older.

Which type of non-traditional care did you select?

Percentages may exceed 100 due to rounding.

Why did you choose a non-traditional care option?

50%
Needed care **quickly**

48%
Care was **easier** to access

46%
Location was **convenient**

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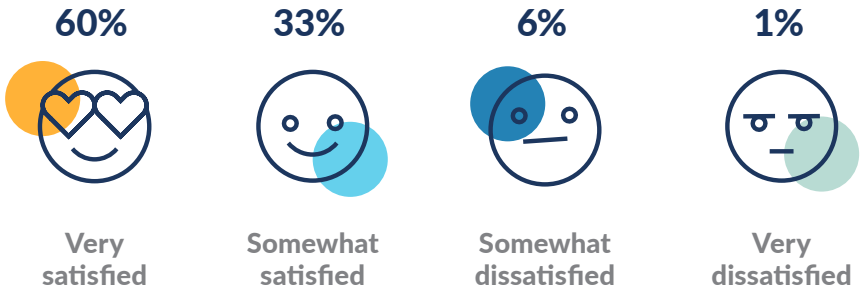
Trends Among Patient/Provider Engagement and Communication

WHILE PROVIDERS ARE GENERALLY DOING A GREAT JOB OF COMMUNICATING WITH PATIENTS, THERE IS STILL ROOM FOR IMPROVEMENT

A majority of the consumers surveyed were very satisfied (60%) or somewhat satisfied (33%) with the level of communication they receive from their provider. Nonetheless, 7% are somewhat or very dissatisfied with the level of communication they receive from their providers, which leaves room for improvement. In comparison to our second annual survey, most consumers surveyed (8 out of 10) were satisfied with the level of communication they received from their primary healthcare providers, while 19% were not satisfied with the level of communication they received from their providers.

As a health system, a dissatisfied patient could impact your profitability at a time when optimizing core functions like patient engagement, recruitment, and retention are paramount. Additionally, of those surveyed who have a PCP, 66% who received follow-up instructions are very satisfied with the level of communication. Conversely, of those surveyed who have a PCP, only 42% who never received follow-up instructions are very satisfied with the level of communication received.

How satisfied were you with the level of communication with your healthcare provider?



42%
of survey respondents
DID NOT RECEIVE
clear follow-up instructions
from their doctor.

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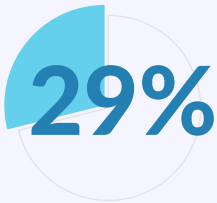
A MAJORITY OF PATIENTS NEED AT LEAST ONE APPOINTMENT REMINDER

A shift in this year's survey compared to our last survey is the number of reminders healthcare consumers prefer. In 2022, 55% of respondents indicated one reminder was sufficient while 22% said that no reminders were needed. In 2021, 71% of overall survey respondents said that multiple reminders helped them keep track of appointments. Our new survey showed that nine in 10 young adults need at least one reminder from their healthcare provider prior to their visit. Additionally, 20% of healthcare consumers missed an appointment in the last year, with almost one-half (48%) under age 35 and 12% aged 55 or older. Overall, 24% of those who missed an appointment did not reschedule it.

Adults with PCPs are most likely to respond to phone calls (49%) from their provider's office, followed by email (23%), and text messages (13%). When it comes to younger adults, 37% are more likely to respond to a phone call versus 23% preferring email and 17% preferring texts. More than two thirds (68%) of older adults select phone call as the method of communication to which they are most likely to respond.

Most common reasons for missing an appointment:

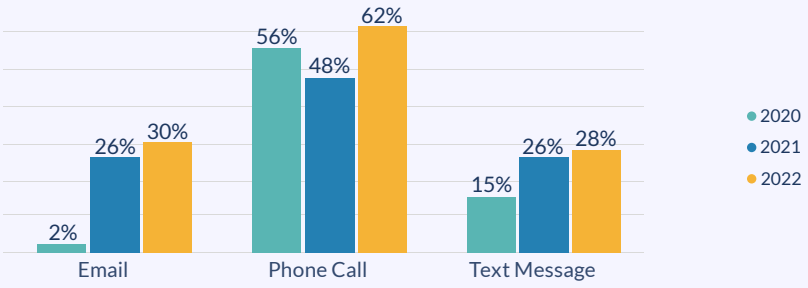


indicated that there **weren't appointment times** that met the patient's need.

27% forgot about their appointment.

24% of those who missed an appointment did not reschedule it.

While 2020 survey data showed email and text as top channel preferences, when asked what prompted them to reschedule a missed appointment, trending data tells a different story.



55%

OF RESPONDENTS INDICATED ONE REMINDER WAS SUFFICIENT,

while 22% said that no reminders were needed.

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How Do Patients Schedule Appointments? Hint: They Use the Telephone

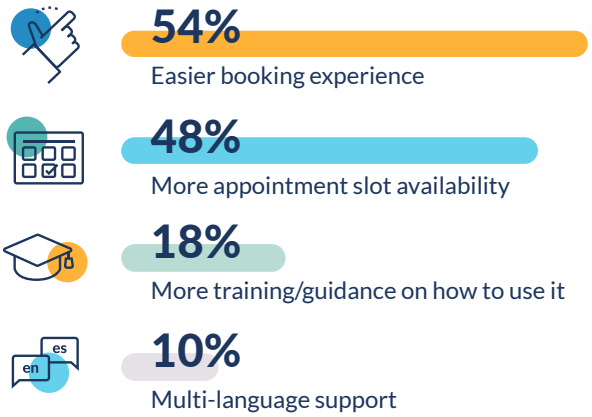
THE HUMAN TOUCH IS STILL VALUED

Although there has been a continued adoption of online scheduling, as about half of adults (48%) surveyed have used online/mobile self-scheduling to book a medical appointment in the last year, health systems should give consumers the option to speak with a live voice agent.

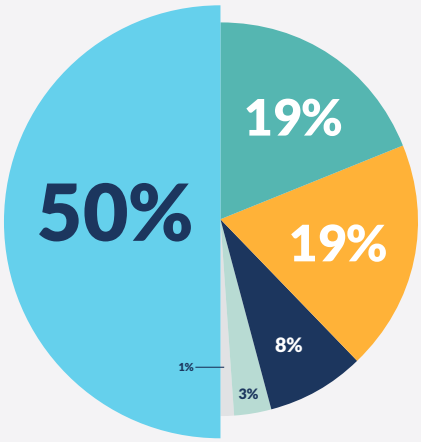
While older adults are more likely to always schedule medical appointments by phone (59%), nearly nine in 10 respondents schedule appointments by phone at least some of the time. Additionally, of the respondents who used live voice to schedule their recent appointment, 52% noted that the experience was helpful, and the representative showed compassion and empathy for their medical need. Among the 35% who used a connected approach (online/mobile self-scheduling, web form fill, or text) to book their recent appointment, 70% of respondents were very satisfied with their experience.

Among those surveyed who did not use online/mobile scheduling in the last year, 63% of them gave a reason that they simply preferred to call the office, and 21% said their provider does not offer online scheduling. Overall, 11% of healthcare consumers surveyed noted that their provider does not offer online scheduling.

In the next year, what would convince you to use a provider's online scheduling tool to book your medical appointments?



How long did you wait on the line to speak with a telephone representative the last time you called to make an appointment?



- 1-5 minutes: **50%**
- Less than 1 minute: **19%**
- 6-10 minutes: **19%**
- 11-20 minutes: **8%**
- Over 20 minutes: **3%**
- I hung up before speaking with anyone: **1%**

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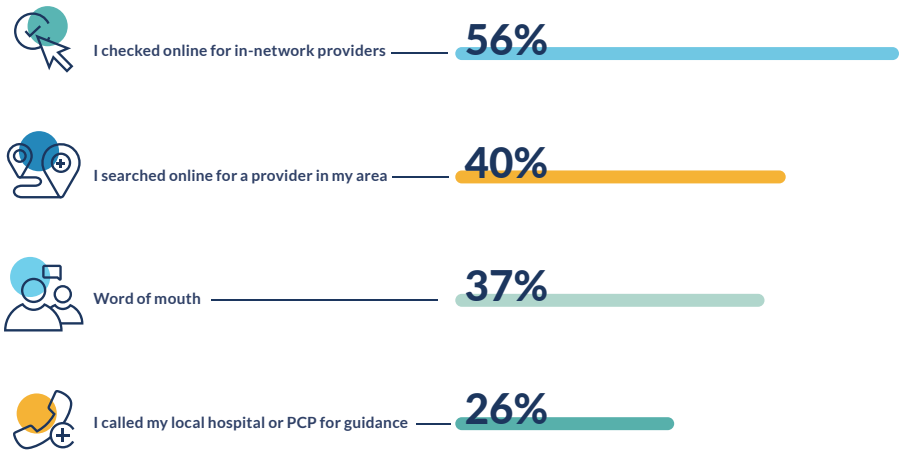
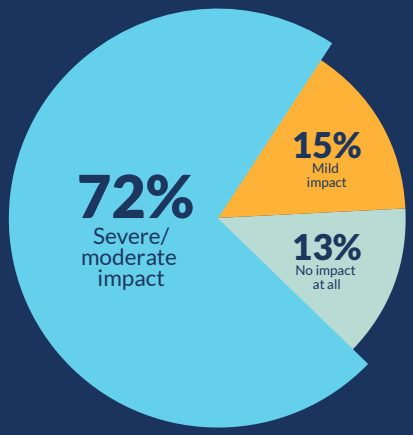
Healthcare Consumers are Doing Their Homework Online Before Selecting a Physician

Since our inaugural survey in 2020, the healthcare landscape has evolved drastically as patients strive to be in the driver's seat of their healthcare journeys. The industry has undergone a fundamental shift from being provider-focused to being patient-focused, and patients have more options when it comes to finding a physician. As a result of this evolution, hospitals and health systems should understand the immense impact of online reviews. The survey verified that online physician reviews can impact a consumer's decision to seek care with them. Fifty-four percent of total respondents reported that the online reviews had a moderate to severe impact on their decision. When seeking a new healthcare provider, online reviews are much more likely to impact the decisions of younger adults (72% aged 18 to 34 are impacted by online reviews compared to only 57% aged 35 to 54 and 37% aged 55 and older).

What resources did you use when searching for a provider?



How do online physician reviews impact younger adults (aged 18 to 34)?



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Telehealth is Here to Stay but In-Person Appointment Preferences Remain

Hybrid healthcare combines in-person and remote patient care with digital technology to improve outcomes. The hybrid care model continues to remain popular due to the convenience of telehealth visits combined with in-person care, as patients are returning to pre-COVID comfort levels regarding obtaining traditional, onsite care.

Although 44% of surveyed healthcare consumers prefer in-person visits with all providers, telehealth visits continue to be a prominent way to connect. Among those who are open to telehealth for some providers, primary care (55%) and mental health (45%) are the most commonly preferred virtual appointments. Specialties where virtual appointments are not preferred include dermatology, pediatrics, ENT, cardiology, urology, gynecology, orthopedics, and pulmonology.

While nearly half (45%) of healthcare consumers surveyed used telehealth at least once in the last year, 25% only used it one or two times. This is a decrease from our previous survey, which showed that 39% of respondents used telehealth appointments one or two times in the last year. Older adults are accessing telehealth less frequently, with only 26% accessing it one or more times.

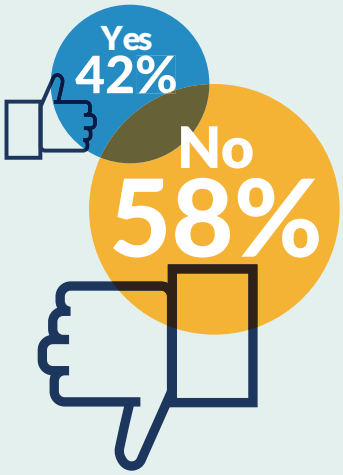
A third of surveyed adults who had a telehealth visit in the past year mentioned that the provider only offered telehealth visits and not in-person visits. This is a substantial increase from last year, as only 4% previously indicated that their provider only offered telehealth visits.

SATISFACTION WITH TELEHEALTH IS HIGH

While healthcare consumers prefer in-person visits, 90% of survey respondents rated their telehealth experience as good or excellent. Year-over-year, convenience (58%) and safety (43%) continue to be the top reasons for choosing telehealth. A further 24% report that they get access to a better provider through telehealth, and 21% indicate cost as a factor.

For telehealth to be successful, we need to focus on appointments that can be resolved successfully via the telehealth appointment. Forty-two percent of respondents indicated that they needed to book a follow-up, in-person visit after their telehealth visit for the same issue. This is an indication that not every appointment is right for a telehealth visit, and careful consideration is needed to determine which services are best to transition online.

Did you need to book a follow-up, in-person visit after your telehealth visit for the same issue?



Interest in Virtual Waiting Rooms Continues

If given the choice today, 43% of the healthcare consumers surveyed would choose to wait in a virtual waiting room (where you stay in your car, at home, or nearby the facility until an exam room is ready) over a physical waiting room. However, interest in virtual waiting rooms has decreased since the 2021 survey was conducted, as 64% of respondents at the time preferred virtual waiting rooms to physical ones, likely due to potential COVID-19 exposure concerns.

Interestingly, most older adults (73%) prefer a physical waiting room, while the preferences of younger adults are split; 46% of younger adults aged 18 to 34 and 51% of adults aged 35 to 54 prefer physical waiting rooms. This is an indication that health systems should continue to offer both virtual and physical waiting rooms to meet shifting patient preferences.

Home Health Care Services Have Room to Grow

Home health care includes skilled nursing care as well as other skilled care services, like physical and occupational therapy, speech-language therapy, and medical social services, which are provided in the home. According to the survey, 79% of respondents have not used home health care services for themselves or their family in the last year, an indication that this is still an untapped resource. However, among the 21% of healthcare consumers surveyed who have used home health care services for themselves or other family members, 72% were very satisfied with the level of care received.

Our survey also revealed that younger adults were more likely to obtain the service (32%). In fact, only 9% of respondents aged 55 and older indicated that they had used home health care in the last year. The top reasons for not using home health services this year included a lack of need (79%), a misunderstanding of how to receive the service (11%), and cost factors (8%).

Aside from a lack of need, what were the top reasons for not using home health care in the last year?

11% **Don't know** how to receive the service

8% **Cost** factors

7% **Lack of** access

Younger adults were more likely to obtain home health care services (32%).

9% of respondents aged **55 and older** indicated that they had used home health care in the last year.

Emergency Room Visits Decrease; Online Bookings at ERs Rise

Only 23% of respondents received care in the emergency room (ER) in the past year, a significant decrease compared to the 47% of respondents in our 2021 survey. In the last year, younger people aged 18 to 34 visited the ER most often (33%), compared to those aged 35 to 54 (25%) and those 55 and older (13%).

While half of respondents walked into the ER for treatment (49%), other ways of booking the visit included the doctor calling in advance (14%), arriving via ambulance (13%), booking an appointment online (13%), and getting on an online waiting list (11%). A big difference among respondents from our 2021 survey is the use of an ambulance to get to the ER. In 2021, 48% of respondents used an ambulance compared to 13% in 2022.

PROVIDERS ARE DOING A FAIR JOB OF STAYING IN TOUCH WITH PATIENTS AFTER A TRIP TO THE ER, BUT THERE IS STILL ROOM FOR IMPROVEMENT

A majority of respondents had a touchpoint with the hospital or health system after their recent ER visit, with 67% reporting that a healthcare professional reached out within 72 hours and 57% reporting they received a referral to a provider within the system. However, 43% either were referred outside of the hospital/health system or did not need a referral, signaling a chance for more in-network retention.

Of the respondents who received clear, post-visit follow-up instructions from their doctor, 66% reported being very satisfied with communication, indicating that frequent touchpoints make a difference in patient satisfaction rates.

91% of patients who received care in the ER **needed follow-up care.**

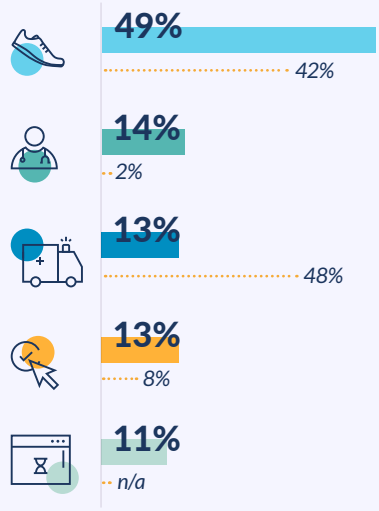
HOWEVER

34% of those patients who received ER care **did not** receive a referral.

And

33% of ER patients **did not receive follow-up** communication after a visit.

Comparing the data from 2022 to 2021, using an ambulance to get to the ER dropped by 73%, while booking a visit online increased by 62.5%.



- Walked in
- Doctor called and said I was on my way
- Arrived via ambulance
- Booked a treatment time online
- Got on a waiting list online

2021 Survey Findings

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Younger Populations and Those Severely Affected by COVID-19 are Much More Likely to Seek Mental Health Treatment

The COVID-19 pandemic continued to impact the mental health of our survey respondents, with 39% reporting being moderately or severely impacted. When looking at the 18- to 34-year-olds, that number jumps to 59%, compared to only 17% of those 55 and older.

Overall, one in five (22%) respondents sought mental health treatment in the last year. That number is higher for younger adults aged 18 to 34, with 39% of them seeking mental health treatment in the last year. For those surveyed who experienced a severe impact on their mental health from COVID-19, 66% sought treatment. Among those who are open to telehealth for some providers, mental health (45%) is one of the most commonly preferred virtual appointments.

1 in 5
SURVEY RESPONDENTS
sought **mental health** treatment in the last year.

What severity of impact has COVID-19 had on your mental health in the last year?

12%
Severe impact

27%
Moderate impact

28%
Mild impact

33%
No impact at all

59%
of younger adults experienced a severe to moderate impact in the last year.

47%
of older adults experienced no mental health impact in the last year.

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What These Findings Mean for Your Health System

STREAMLINE APPOINTMENT SCHEDULING AS MUCH AS POSSIBLE TO IMPROVE CARE ACCESS

- **Encourage** patients to stay up-to-date with their health by making appointments easier to book.
- **Address** potential scheduling frustrations with fast, convenient, and easy online self-scheduling and multilingual live voice scheduling.
- **Boost** adoption of online scheduling by making the process easy to understand and use.
- **Enable** self-scheduling across all care venues, including emergency, urgent care, physicians, and specialists, for convenience through any channel.
- **Broaden** the reach of your digital solutions by offering online scheduling in native languages for non-English speaking patients.
- **Offer** multi-lingual voice agents for patients who prefer to schedule appointments over the phone.

FOSTER ENGAGEMENT TO DRIVE HEALTH AWARENESS AND ACTION

- **Improve** patient outreach campaigns with communication and reminders to keep patients on schedule with care.
- **Follow up** with patients after appointments to increase satisfaction with providers.
- **Educate** specific patient groups on important health awareness activities, such as staying up-to-date on vaccinations.
- **Augment reputation management** and keep track of patient reviews by location as well as monitor competitive position.
- **Attract** and covert potential patients and continue the conversation through private two-way messaging.
- **Offer** a wide range of health classes and events to promote patient involvement in their unique health journeys.

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COMMUNICATE AND ENGAGE PATIENTS USING MULTICHANNEL STRATEGIES

Utilize a combination of different communication tools, including automated texts, email, professional recorded voice, and live agent messages to provide the right information at the right time so patients understand how to access care and adhere to their care plans.

Offer more care venues and appointment times to prevent patients from seeking care elsewhere if the wait is long.

Send at least one reminder to decrease no-shows and halt additional reminders when patients confirm appointments.

Gain valuable insights into patient satisfaction with automated surveys.

OFFER LIVE VOICE COMMUNICATION TO ACCOMMODATE ALL PATIENTS' PREFERENCES

Deliver a compassionate experience by phone 24/7 with professional live voice scheduling services to prevent patients and staff from playing phone tag.

Communicate with patients in their preferred language to drive satisfaction and adherence to treatment plans, including appointment reminders, attendance, medications, and more.

Decrease the scheduling burden on office staff and reduce scheduling errors.

Optimize patient access and provider productivity by filling schedule gaps.

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IMPROVE ER EXPERIENCES WITH COMMUNICATION TO KEEP PATIENTS INFORMED

Provide online check-in and virtual waiting rooms for patients with low-acuity illnesses or injuries so they can wait at home until their projected treatment time.

Deliver up-to-date information to patients and families on the status of their visit.

Send arrival notifications to staff 15 minutes before patients arrive so providers can prepare space and supplies ahead of time.

Offer digital tools to help patients and family navigate forms and information for a cohesive ED experience.

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

Methodology

Stericycle Communication Solutions partnered with Ipsos to survey 1,004 adults ages 18 and older from the continental U.S., Alaska, and Hawaii. The survey was conducted online in English and Spanish. Ten percent of respondents were Hispanic and able to complete the survey in Spanish or English. The survey was conducted between July 5-8, 2022.

Ipsos calibrates respondent characteristics to be representative of the U.S. population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2019 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

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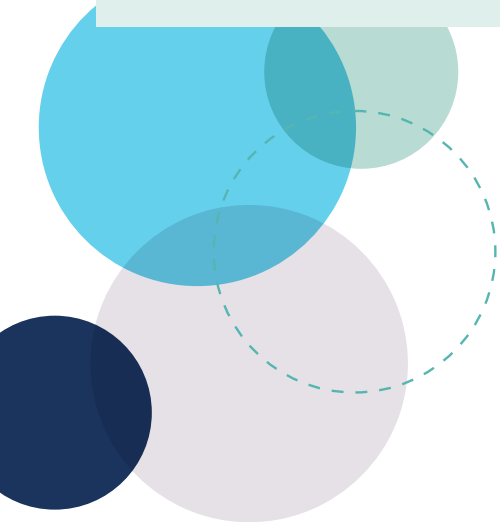
Modernizing Patient Engagement. Maximizing Patient Outcomes.

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**.



RESOURCES:

1: One in five in U.S. report delayed health care during pandemic
https://www.hsph.harvard.edu/news/hsph-in-the-news/one-in-five-in-u-s-report-delayed-health-care-during-pandemic/