Patient Access Preferences Report: The Pandemic's Lasting Impact

1,000 People Weigh in on Everything From Virtual Care to Vaccines

INTRODUCTION: THE LASTING IMPACT OF COVID-19 ON PATIENT ACCESS

The challenges of the COVID-19 pandemic accelerated widespread patient access innovation—particularly digital transformation—as healthcare organizations worked hard to maintain access to care through ongoing uncertainty. Healthcare consumers and care organizations alike rapidly adopted a "digital-first" mentality, with organizations quickly implementing or expanding related initiatives, such as virtual care visits and online scheduling, to prevent care gaps and expand self-service options for arranging care. Consumers' preferences and expectations about healthcare have correspondingly shifted, giving way to a new outlook rooted in having the flexibility to choose when, where, and how to access care.

To help healthcare organizations gain timely insight into these changing expectations, Kyruus surveyed 1,000 people across generations and geographies to understand their experiences during the pandemic and the permanent impact it has made on their future care decisions.

DETAILS ABOUT THIS STUDY

This report is based on a survey of 1,000 people conducted by Wakefield Research on behalf of Kyruus in March 2021. Respondents were from across the United States and represented a comparable mix of private insurance and Medicare or Medicaid—alongside approximately 20% military/VA, other, or no coverage—from four age groups (18-34, 35-49, 50-64, 65+ years).

KEY FINDINGS

CARE DELAY TRENDS:
How and why people adjusted their care routines during the pandemic

Many consumers put their care on hold during the pandemic, with safety their primary concern. Over 50% of respondents reported delaying some type of care (e.g., routine, specialty, mental health, or surgical care) during the pandemic.

VIRTUAL CARE EXPERIENCES:
How people reacted to virtual care and their interest in it long-term

Hybrid care delivery—through a combination of virtual and in-person visits—is here to stay. Over 40% of people indicated a preference for accessing routine and/or mental healthcare entirely virtually or through a combination of virtual and in-person visits.

COVID-19 VACCINE ACCESS:
How vaccine-specific access behaviors compare to overall access trends

Consumers want to book COVID-19 vaccine appointments online. Whether or not respondents had already scheduled a vaccine appointment, nearly 60% said they would prefer to book online.

FUTURE ACCESS PREFERENCES:
How people want to arrange and obtain care in the future

Convenience and cost supersede loyalty for consumers deciding where to seek care. Respondents ranked insurance accepted (48%) and ability to obtain timely care (37%) highest among key decision criteria. Less than 25% cited loyalty.

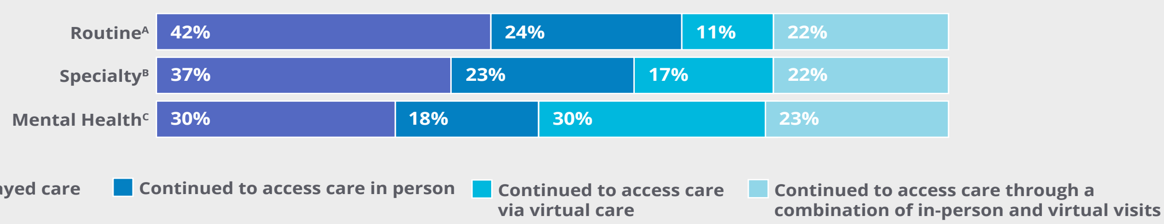
THE PAUSE OF IN-PERSON CARE: CONSUMER CARE DELAYS DURING THE PANDEMIC WERE WIDESPREAD

Over half (52%) of survey respondents reported that they delayed some form of care (e.g., routine, specialty, mental health, or surgical care) during the pandemic. The other half chose to continue receiving care through in-person and/or virtual visits, with a majority having used a combination of care modalities—both virtual and in-person care—showing patients' willingness to adapt to new care delivery models.

When asked about specific care types applicable to them, people were most likely to have delayed routine care[1] (42%), followed by surgical care (38%) and specialty care[2] (37%). Those seeking mental health services[3] were least likely to have delayed care during the pandemic, with only 30% delaying this type of care completely. Among those who maintained access to mental health services, 42% did so through virtual care exclusively and 32% through a combination of in-person and virtual visits.

Figure 1. Care Delays During the Pandemic By Care Type

Has the COVID-19 pandemic caused you to delay any [routine, specialty, and/or mental health] care?
(Among those for which care type was applicable)



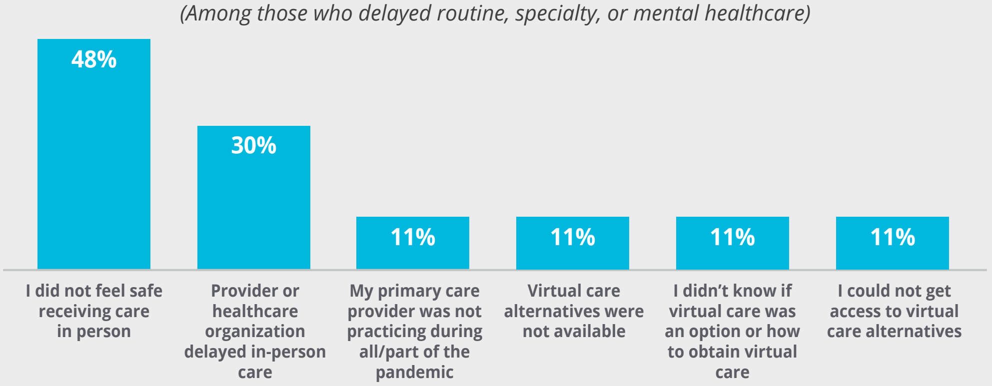
Note: All percentages may not add up to 100 due to rounding.

n= 829(A), 636(B), 430(C)

For those who did delay non-surgical care, safety concerns were the primary reason (48%) followed by recommendations from a provider or healthcare organization to postpone care (30%). These reasons for delay were consistent across care types, including surgical procedures. Additionally, nearly 1/3 of consumers (29%) who delayed non-surgical care pointed to access barriers related to virtual care—they were either unable, unaware, or did not know how to access virtual care alternatives.

Figure 2. Key Reasons Why Consumers Delayed Care During the Pandemic

What caused you to delay your care during the pandemic?
(Among those who delayed routine, specialty, or mental healthcare)



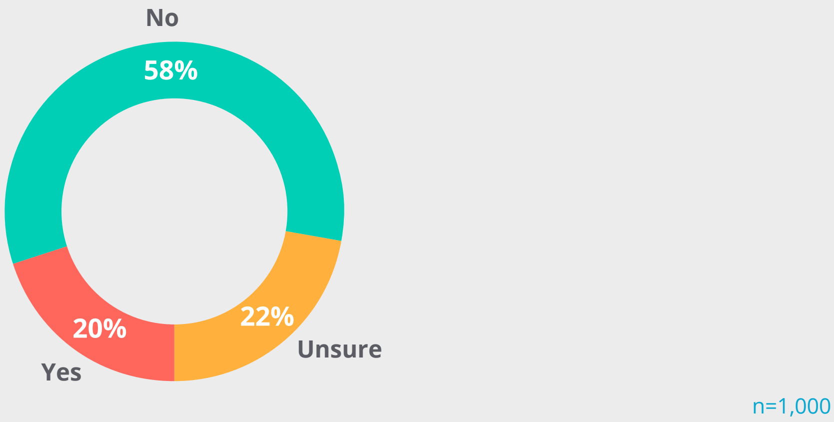
n=398

1. Routine care was defined as annual check-ups or screenings, such as mammograms or colonoscopies.
2. Specialty care was defined as treatment for a specific condition by a specialist physician such as a cardiologist or neurologist.
3. Mental/behavioral healthcare was defined as therapy or addiction treatment.

When looking at the rest of 2021, almost 60% of people do not plan to delay in-person care, but uncertainty persists for the remainder: 20% plan to push out care and 22% are unsure.

Figure 3. Consumers' Plans to Continue Delaying Care

During 2021, do you expect to delay in-person care due to the pandemic?



IMPLICATIONS FOR HEALTHCARE ORGANIZATIONS

- **Boost visibility of your COVID-19 safety protocols to support the return to in-person care.** Continue providing proactive updates—through online and offline channels—about what your organization is doing to make it safe to return, as well as resources for consumers who want to learn more about your safety protocols.

- **Provide clear guidance to consumers about their care options—both virtual and in person—to simplify decision making and help them resume care sooner.** Leverage online tools, such as a virtual assistant on your website, and offline resources, such as your access center(s) or clinic office(s), to address frequently asked questions about care options at your organization.

- **Encourage patients who have missed out on important preventive care to resume care when it is safe for them.** Proactively engage patients in need of routine care screenings, such as mammograms and colonoscopies, and consider targeted campaigns to convey the importance of these screenings for early detection.

THE RISE OF VIRTUAL CARE: HYBRID CARE DELIVERY IS HERE TO STAY

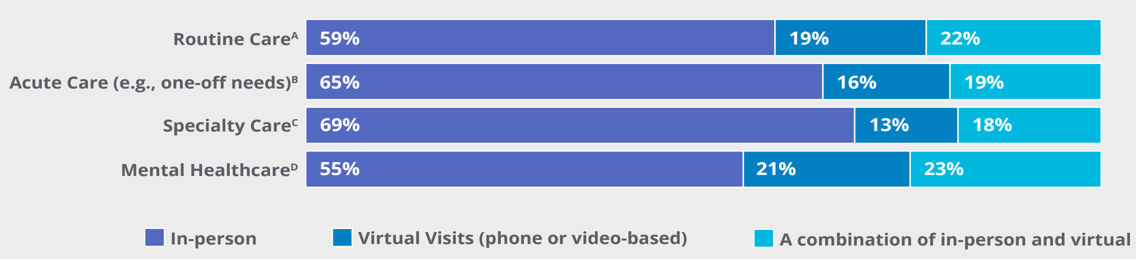
As the pandemic unfolded, virtual care emerged as an essential solution to provide care to patients who were unable to—or preferred not to—receive it in person. Providers—especially primary care providers (PCPs)—were quick to adapt to this need, with over 50% of consumers reporting that their PCP offered virtual care visits during the pandemic (of respondents who have an existing PCP). Consumers similarly embraced virtual care: 62% of respondents had a virtual care visit of some kind in the past 12 months, and for 71% it was their first ever virtual visit. This finding is consistent with findings from Kyruus' 2020 virtual care research, which revealed that 72% of consumers who accessed virtual care during the pandemic did so for the first time.[4]

71%
of respondents who obtained virtual care during the pandemic did so for the first time ever

Over the long term, while the majority of consumers still prefer in-person care—across care types—there is significant continued demand for virtual visits, particularly for routine and mental healthcare. For example, over 40% of respondents indicated a preference for accessing the latter care types virtually or through a combination of virtual and in-person visits, compared to 35% for acute care and 31% for specialty care.

Figure 4. Consumers' Preferred Care Settings by Care Type

Long term, what is your preferred setting for receiving care?



Note: All percentages may not add up to 100 due to rounding.

n= 925(A), 832(B), 858(C), 677(D)

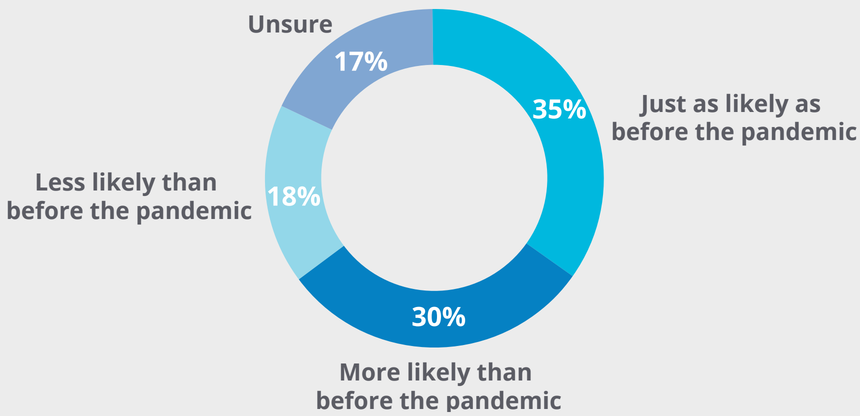
While it hasn't displaced in-person care, virtual care has gained major ground: going forward, consumers are more likely to choose virtual visits than they were pre-pandemic, with 2/3 of respondents stating they are equally or more likely to choose a virtual visit than before. Furthermore, when asked how access to virtual care will impact their choice of where to obtain care in the future, nearly 2/3 of all respondents (63%) said it will be an important factor in their decision making. Additionally, of those who fell in this category, 40% said they would switch providers for the option to have virtual visits.

Almost 1/3
of people are more likely to choose virtual visits now than before the pandemic

4. Kyruus, Patient Perspectives on Virtual Care, 2020.

Figure 5. Consumer Likelihood to Seek Virtual Visits Post-Pandemic

Compared to before the COVID-19 pandemic, are you more or less likely to choose virtual visits moving forward (when a virtual visit is an option)?



n=1,000

IMPLICATIONS FOR HEALTHCARE ORGANIZATIONS

- **Establish clinical protocols to proactively ensure virtual care offerings align clinical needs with consumer preferences.** Create a digital health council with clinical and cross-functional leaders to define and implement longer-term virtual care guidelines that are both clinically appropriate and allow for consumer choice whenever possible.

- **Promote ongoing virtual care offerings for key services to help consumers navigate their options for accessing care.** Create dedicated marketing communications to inform consumers about specific services they can continue to access virtually, such as mental healthcare, to help them understand the various options at your organization.

- **Make it easy for consumers to schedule the right type of care, both online and offline.** Ensure that your digital presence—including your online find-a-provider—accurately reflects booking options and care types (virtual and in-person), and that your access center agents are properly equipped to guide people through the booking process on the phone.

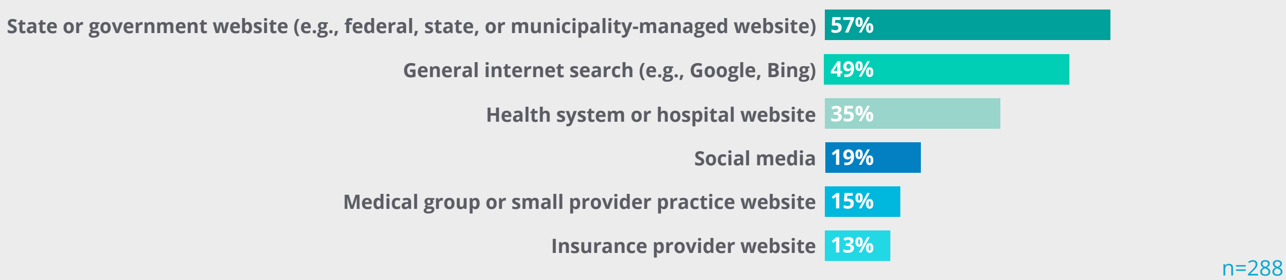
COVID-19 VACCINE ACCESS: DIGITAL CHANNELS DELIVER ON PATIENT SATISFACTION

The rollout of COVID-19 vaccines represented a turning point in the pandemic and consumers eagerly sought information on how to access them. Consistent with past consumer research, the internet was the primary resource consumers consulted. At the time of this survey, nearly half of respondents (46%) had looked for vaccine appointment information.

When searching for COVID-19 vaccine information on the internet, consumers consulted state or government websites (57%), general internet searches (49%), or a health system or hospital website (35%). Excluding state and government websites, which have a unique role when it comes to the vaccine rollout, this ranking is consistent with Kyruus' annual patient access journey research on how consumers find new providers online more generally.

Figure 6. Consumers' Top Online Sources for Gathering Vaccine Appointment Information

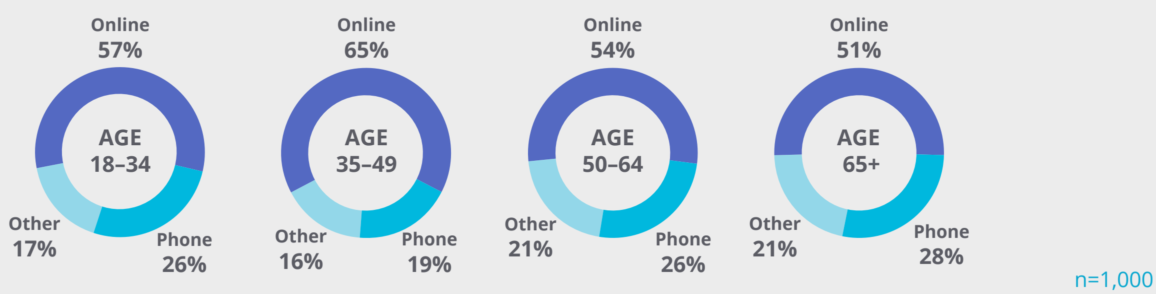
Which resources did you consult in your online search for information about COVID-19 vaccine appointments? (Among those who searched for information on COVID-19 vaccine appointments online)



In addition to researching how to access COVID-19 vaccines, over 40% of consumers also attempted to book a vaccine appointment for themselves and/or others. Regardless of whether or not respondents had booked a COVID-19 vaccine appointment yet, nearly 60% said they would prefer to do so online—a proportion even higher than in Kyruus' most recent consumer research (43%).[5] Also consistent with earlier research, the preference for online booking was higher among younger generations. However, even among the 65+ age group, which had the lowest preference for online booking, the majority (51%) still cited online scheduling as their preferred method. Overall, those who prefer online booking see this method as convenient (56%), easy (51%), and quick (50%).

Figure 7. Consumers' Preferred Booking Method for COVID-19 Vaccines by Age Group

Regardless of whether or not you have scheduled a COVID-19 vaccine what would be your preferred method of booking a COVID-19 vaccine?



5. Kyruus, Patient Access Journey Report, 2020.

IMPLICATIONS FOR HEALTHCARE ORGANIZATIONS

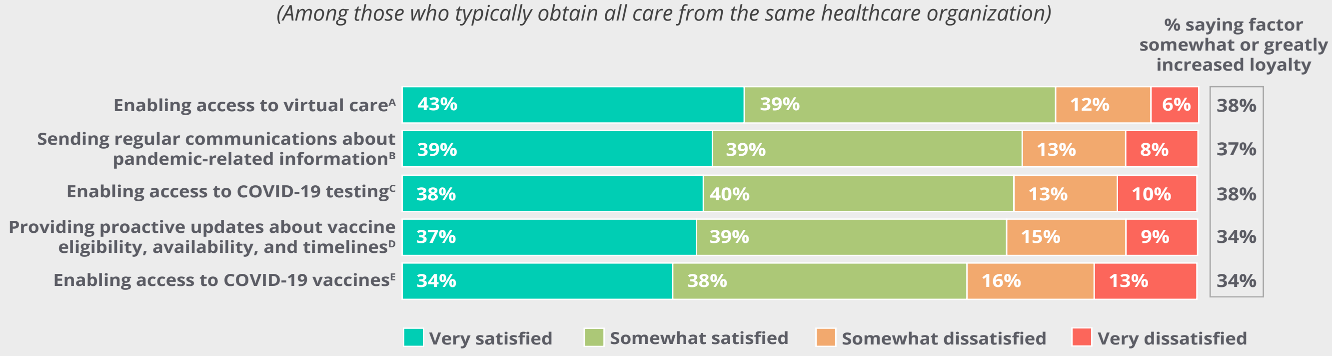
- **Foster trust with consumers by ensuring that your organization is a reliable source of COVID-19 vaccine information over the long term.** Continue to provide timely, accurate, and consistent information about COVID-19 vaccine access across online and offline channels to build trust with consumers.
- **Activate online scheduling for COVID-19 vaccines to expand access for the general public.** Simplify vaccine access by enabling consumer self-scheduling, allowing you to meet growing demand for digital self-service and mitigate inbound call volumes in the process.
- **Prioritize a multi-channel approach to vaccine scheduling to meet the needs of a broad population of consumers.** While online scheduling is a priority for many consumers, technology or internet access barriers persist for others. Leverage your access centers, community partnerships, and other offline communication channels to account for varied preferences and needs.

THE POST-PANDEMIC OUTLOOK: COST AND CONVENIENCE SUPERCEDE LOYALTY

As the patient access experience underwent a rapid evolution during the pandemic, healthcare organizations worked to maintain patient satisfaction and loyalty amid these changing circumstances. Results show that their efforts had a positive impact, though opportunities for improvement remain. Among respondents who obtain all of their care at one organization, 35-40% reported high levels of satisfaction across key areas: enabling access to virtual visits, proactive communication, access to COVID-19 testing, and proactive vaccine updates. At the same time, there is still room to boost satisfaction for the remainder (approximately 60%) who were dissatisfied or only somewhat satisfied.

Figure 8. Consumer Satisfaction with Healthcare Organizations' Handling of the Pandemic

How satisfied have you been with your healthcare organization's handling of the pandemic in the following areas?
(Among those who typically obtain all care from the same healthcare organization)



Note: All percentages may not add up to 100 due to rounding.

n= 557(A), 592(B), 557(C), 584(D), 549(E)

When asked about the extent to which their organizations' handling of these pandemic-related areas impacted their loyalty, over 1/3 of applicable respondents said their loyalty increased as a result, and only about 10% said that their loyalty decreased. For the remaining majority of respondents, loyalty was unchanged by these specific areas related to pandemic response. These results suggest that organizations' pandemic responses did have a moderate impact on increasing patient loyalty.

Post-pandemic, consumers indicated that insurance coverage (48%) and the ability to obtain timely care (37%) will be the most important criteria impacting their care decisions. These top two factors are consistent with previous research.[6] And although healthcare organizations' handling of the pandemic seems to have increased patient loyalty, loyalty was a distant factor behind these two at 22%.

Figure 9. Key Decision Factors for Consumers When Obtaining Care Post-Pandemic

Post-pandemic, which of the following will have the biggest impact on your decisions about where and from whom you'll obtain care?

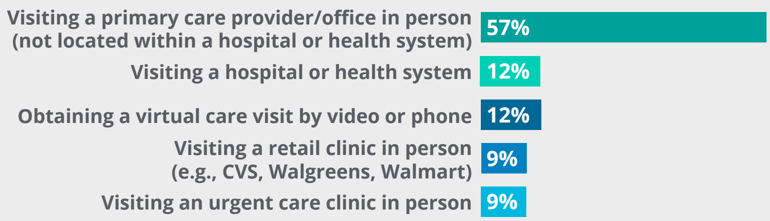
n=1,000

6. Kyruus, Patient Access Journey Report, 2020.

Consumers also provided insight into their preferred care settings and modalities for routine care—today and in the future. Visiting a primary care provider or office in person (57%) stands out as consumers' typical preferred care setting compared to other options. Despite a strong preference for visiting a primary care provider in person, nearly 1/3 of respondents prefer obtaining virtual care or visiting an urgent care or retail clinic, indicating that convenient care options are also a priority for consumers seeking routine care.

Figure 10. Consumers' Typical Preferred Setting for Routine Care

For routine care, what is your typical preferred method of obtaining care?
(Among those who receive routine care)



n=925

Looking forward, over 40% of respondents who receive routine care reported that they are more likely to seek care through a virtual care visit (46%) or by visiting a primary care office or provider in person (51%) as a result of the pandemic. The increased propensity for consumers to seek routine care through both of these options further reinforces the importance of hybrid care delivery and represents an opportunity for healthcare organizations to attract new patients with traditional and new approaches to primary care.

IMPLICATIONS FOR HEALTHCARE ORGANIZATIONS

- **Continue providing proactive communication to reinforce patient loyalty during the pandemic and beyond.** Maintain the positively-received efforts and digital care infrastructure your organization established during the pandemic to re-engage your existing patients and build strong relationships with new ones.

- **Expand your online care search and scheduling experience beyond individual providers to meet consumer demand for convenient care options.** Incorporate new sites of care—such as urgent care sites, retail clinics, imaging facilities, and more—to surface care options aligned with both the type of care consumers are looking for and where they want to access it.

- **Incorporate the most valuable decision-making criteria into your digital consumer experience to boost online conversion and satisfaction.** Streamline the provider and location search and scheduling experience by enabling consumers to sort and filter by the criteria that matter most to them, such as insurance accepted and appointment availability.

CONCLUSION: LEADING PAST THE PANDEMIC TO PROVIDE A CONSUMER-CENTRIC PATIENT ACCESS EXPERIENCE

Whether or not COVID-19 will have a lasting impact on patient access and preferences is no longer a question. While some of the pandemic's influence on consumer choice may be shorter-term, it is evident that the pandemic permanently re-shaped patient preferences and expectations in profound ways.

As healthcare organizations plan for patient access beyond the pandemic, the evolved consumer outlook on obtaining care should be at the forefront of their decision making. The pandemic only accelerated the inevitable: consumer demand for greater choice, convenience, and control over when, where, and how to obtain care. This shift highlights a major opportunity for healthcare organizations to not only maintain the infrastructure they built during the pandemic, but also to expand and optimize it—creating flexible, patient-centric access models that evolve with patient needs. Continuing to educate patients about their options for receiving care—across modalities, settings, and care types—and empowering them to increasingly self-navigate when desired will go a long way in helping healthcare organizations stand out in the post-pandemic world.