

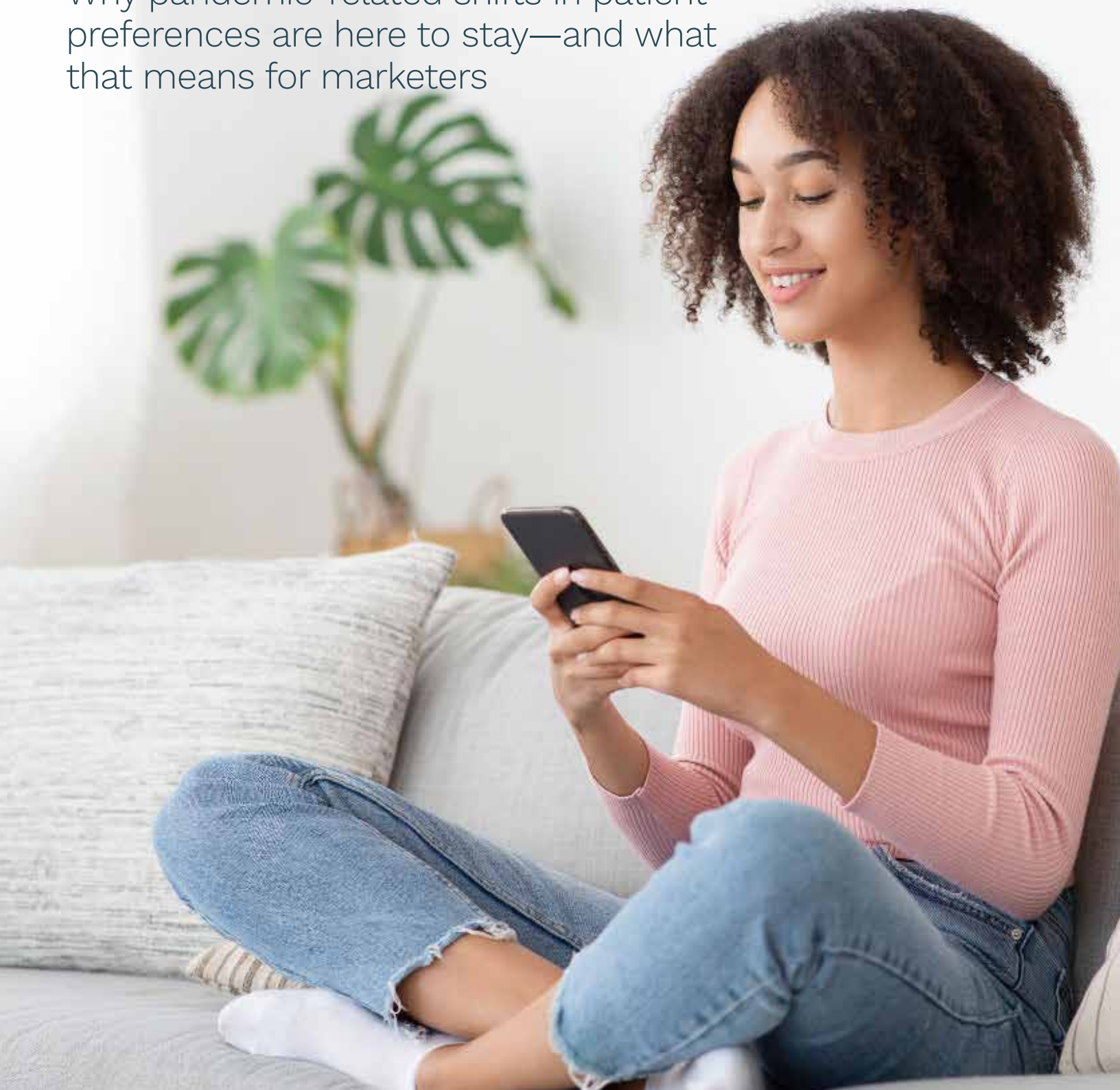
WHITE PAPER

Healthcare consumerism's tipping point

Why pandemic-related shifts in patient preferences are here to stay—and what that means for marketers



Life
Sciences



Healthcare consumerism's tipping point

Executive summary

The COVID-19 pandemic upended healthcare, forcing practices to implement new technologies with unprecedented speed. Digital solutions such as online check-in and telehealth proliferated as contactless workflows became the norm seemingly overnight.

More than a year later, physicians' office-visit volumes have recovered¹, but those solutions have remained in place. New digital tools have brought a level of consumer-centricity—or in this case, patient-centricity—to healthcare that people are accustomed to in other areas of their lives, and they are quickly coming to expect it from their providers, too.

This paper will examine how consumers' rising expectations for convenience, flexibility, personalization and technology-enabled healthcare experiences are here to stay—and what those seismic changes mean for healthcare marketers.

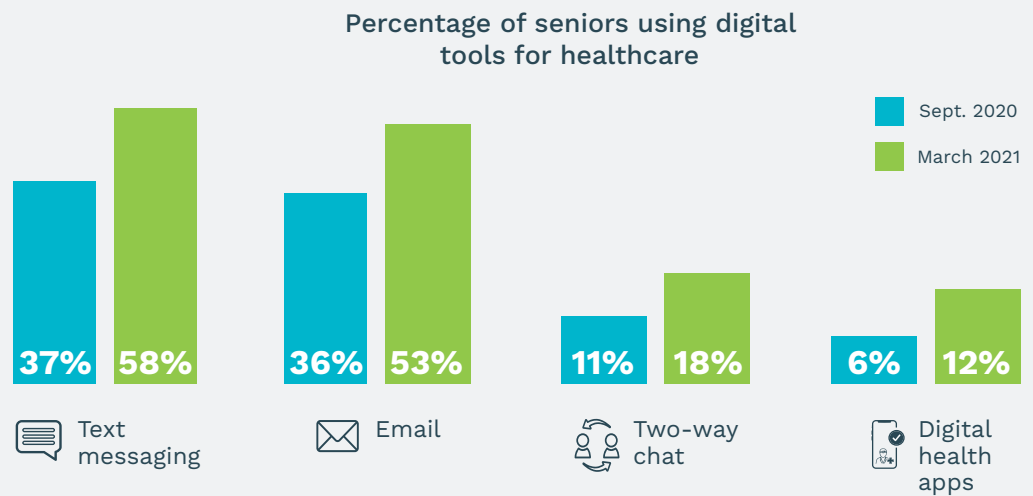


Introduction

In March 2020, doctors' office-visit volumes plummeted to 58% below baseline levels as COVID-19 disrupted both care delivery and practice operations² Those volumes quickly rebounded, and many practices' office-visit volumes returned to pre-pandemic levels by the end of the summer or early fall of 2020. But that rapid recovery masked tremendous, fundamental process changes at the practice level.

Across the country, practices scrambled to implement technologies that were relatively new to many healthcare providers—including text messaging, appointment self-scheduling and mobile registration—although those capabilities had long been commonplace in travel, food service and other consumer-facing industries. Because patients were already familiar with those technologies, they quickly and easily adopted them to access care.

That uptake wasn't limited to the young and traditionally more digitally savvy, either. Patients across all age groups have become increasingly comfortable with online tools over the past year, with patients aged 65 and older embracing technology, too. Phreesia surveyed seniors at two points during the pandemic—September 2020 and March 2021—and discovered that the proportion of older patients using various digital healthcare tools had risen across the board.



It's hard to imagine those trends reversing now that patients have had a taste of how technological innovations can enhance their healthcare experience. And, as these digital tools become more ubiquitous over time, practices will need to stay digitally up to speed if they want to retain patients³ and ensure their satisfaction.

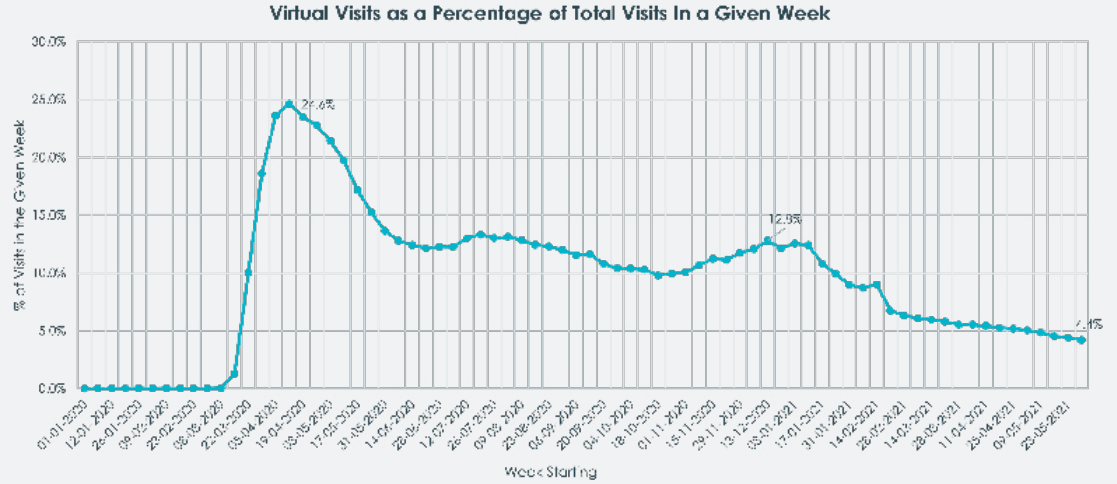
Many providers won't need to be convinced to make that transition, though. The pandemic took a toll on healthcare organizations, both exacerbating staffing shortages and burning out many employees who stayed on.⁴ Now that practices have cleared many of the big hurdles in implementing new processes, they can lean into digital tools to save time, automate workflows and increase their efficiency.

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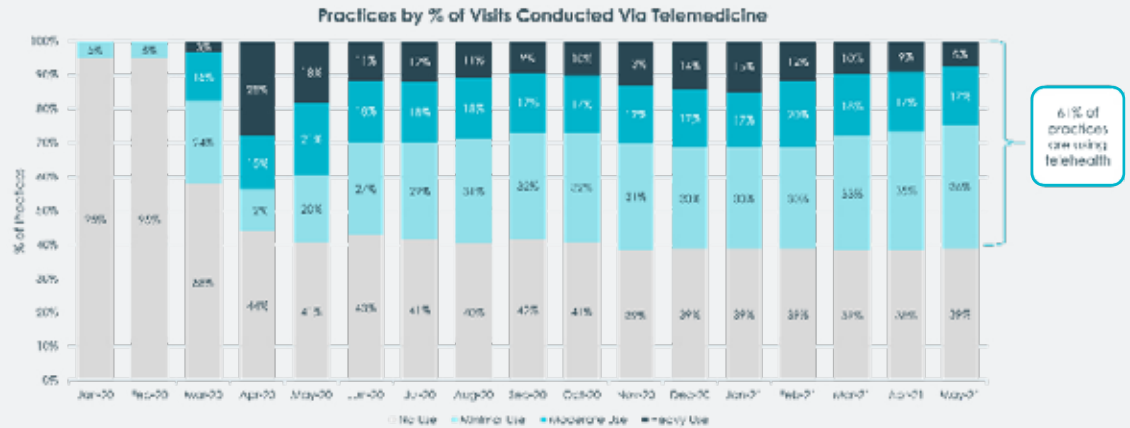
Here's a look at some of those key tools, as well as insights into how and why they're resonating with patients—and the opportunities they present for marketers.

Telehealth

Before March 2020, telehealth use was nearly non-existent in most healthcare settings, but of course, that all changed—and fast. Telehealth use hit an all-time high early in the pandemic, with virtual visits comprising nearly 25% of all doctors' appointments.

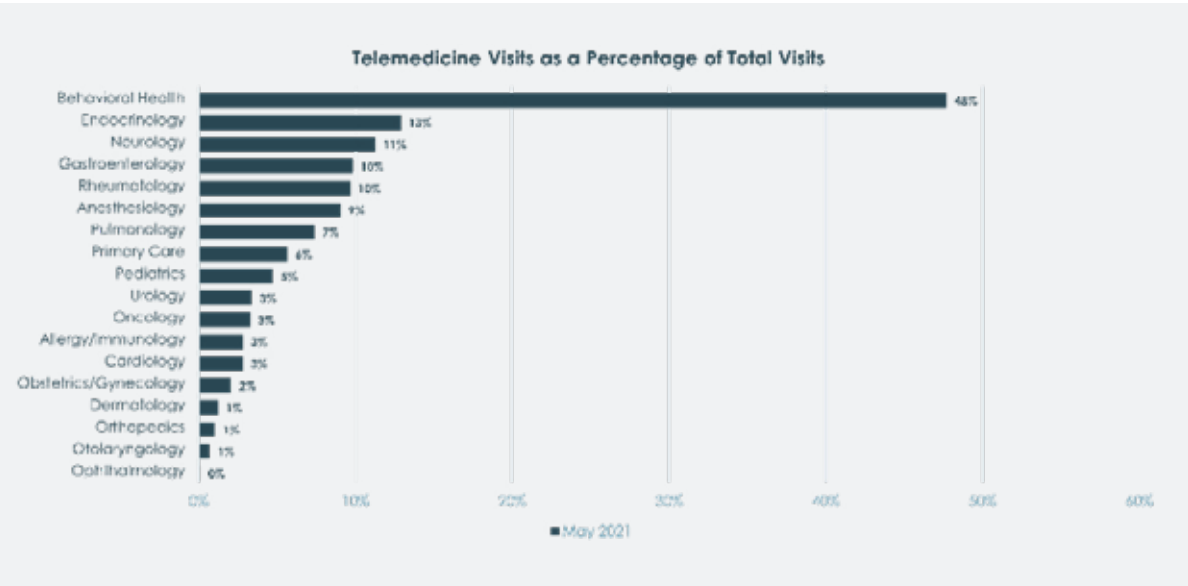


That percentage dropped to 4.4% by the end of May 2021, as patients returned to doctors' offices and practices discerned which appointment types were best suited for telehealth. However, 61% of practices still use telehealth in some capacity, suggesting that virtual visits may have found a permanent place in care delivery.

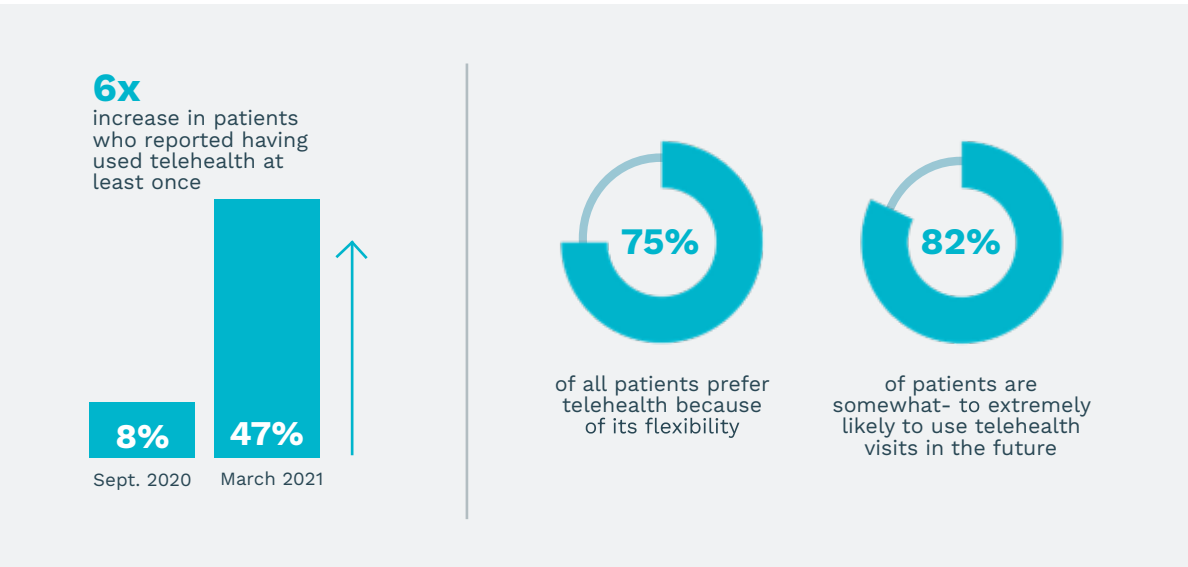


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Practices across many specialties have used it for specific appointment types, such as follow-up visits after procedures and medication refills. And behavioral health providers have found telehealth visits particularly useful.



What's key is that now, nearly half of all patients in the U.S. have used telehealth, and what's more, they like it. In September 2019, only 8% of patients reported ever having used telehealth, but by March 2021, that number had jumped to 47%. In addition, 75% of patients said they preferred telehealth because of its flexibility.⁵



The growing use of telehealth visits presents a major new challenge for marketers. It's not just the doctor-patient interaction that needs to adapt to virtual visits—all the pamphlets and other health-education materials patients receive during appointments must be digitized as well.

But for marketers, the potential payoff is worth the heavy lift. Even though telehealth visits have dropped since the pandemic's early days, millions of clinical appointments are still conducted virtually every year.

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Telehealth also offers a unique opportunity to capture patients' full attention, and if marketers can reach patients right before their appointments—when they're in a virtual waiting room, for instance—they will find they're engaging their audience at a highly receptive moment. As patients wait to see their providers, they're thinking about their health and preparing to make decisions. Marketers will see results if they can use that time in the digital waiting room to provide content and information that can help make the doctor-patient interaction more productive.

Online check-in

The pandemic also contributed to a dramatic increase in online check-in. Between January 2020 and January 2021, as practices pushed for less patient-to-patient and patient-to-staff contact, Phreesia tracked a 63% increase in the number of patients who completed check-in before arriving at their doctor's office.

It's no surprise that patients have jumped on the opportunity to check in early. Before the pandemic, it wasn't uncommon to spend close to an hour or more in a practice waiting room before an appointment. But the pandemic changed that, and many patients chose to bypass the waiting room—and they're not eager to go back.

Online check-in is the norm in other areas of patients' lives and for good reason. Imagine returning to a time when passengers couldn't check in for a flight ahead of time, for example, and instead, had to wait in line at the airport to check in.

For point-of-care marketers though, the "skip-the-waiting-room" approach necessitates reimagining traditional strategies. The less time patients spend within the four walls of the provider's office, the less likely they are to leaf through a pamphlet or see a video on a wallboard. Marketers need to broaden their definition of the point of care, which now has expanded to include patients' cars, homes, pharmacies and beyond.

Self-scheduling

Prior to the pandemic, appointment self-scheduling was beginning to gain traction, but the technology shot up in popularity once COVID-19 vaccines began to roll out.⁶ Across the country, nearly all Americans who have been vaccinated against the virus have scheduled their appointments online, expanding everyone's familiarity with self-scheduling tools. It's worth noting that older patients, who are generally less technologically adept, are particularly familiar with self-scheduling, since they were among the first to be vaccinated.

That familiarity, along with its convenience and efficiency, may encourage practices to roll out self-scheduling more broadly. Phreesia survey data suggests that patients would be amenable to the option: In March 2021, 25% of respondents said they valued the ability to make an appointment online.

For pharmaceutical marketers, self-scheduling represents an opportunity to understand important intent data. Drugmakers have already homed in on their target patient populations, finding ways to present relevant messaging to patients who are most likely to benefit from advertised therapies. But if those messages aren't timed for delivery soon before patients meet with their doctors and make healthcare decisions, their impact is limited.

Self-scheduling data can arm marketers with that key missing insight—when patients seek care from prescribers. Once an appointment is scheduled, a marketer can not only send a dermatology patient a relevant psoriasis message, for example, but they can do it right before the appointment, priming the patient to have a more informed conversation with his or her doctor.



Two-way messaging

The way patients communicate with practices also has changed, and many providers now use two-way text messaging, email and online chat to answer patient questions and communicate appointment reminders, COVID-19 protocols, arrival instructions, appointment follow-up information and more.

These tools have become commonplace in patients' everyday lives. They confirm restaurant reservations, refill prescriptions and sign petitions by text, and connect with retailers and technical-support providers through website chatbots, as just a few examples.

As practices have adopted these tools and brought healthcare in line with other industries, they have raised patients' expectations—and better aligned with their preferences. In a Phreesia survey conducted in March 2021, 67% of patients said they were comfortable communicating with their healthcare providers by text, 59% said they were comfortable communicating by email, and 54% also said they valued the improved ease of communication with practice staff. In fact, patients' preference for digital communication over phone communication with providers increased to 3.4 times more preferable from 1.5 times more preferable between September 2019 and March 2021.

One key feature of all of these platforms is their one-to-one communication. Post-visit email communications, for example, can remind patients to fill prescriptions or provide information or instructions that may support them in staying on their medicines as prescribed—an important tool in addressing barriers to medication adherence.

Marketers, too, have an opportunity to not only reach patients with personalized messaging that's relevant to them and their health conditions, but also to capture their full attention. A patient may be more likely to engage with a tailored communication they receive on their mobile phone than they are to focus on a more general in-office wallboard ad.

Two-way messaging also presents marketers with an opportunity to learn more about the questions that come up for patients when they're not in the doctor's office and to provide messaging outside of the appointment setting. Chatbots, for example, can help marketers understand what types of healthcare information patients are seeking and when they're seeking it. This sets up marketers to better address patients' pain points and to understand what messages will truly address their needs.



Key takeaways

It may have taken a pandemic to get healthcare up to speed in adopting digital technology, but now that it's happened, there's no going back. Not only have patient expectations shifted, but the way patients interact with their providers has shifted, too.

That shift has major implications for pharmaceutical marketers as well. The digital sea change has opened up a host of new ways to reach patients. Going forward, it will be up to marketers—particularly those in the point-of-care field—to meet patients where they are instead of waiting for them to come into the doctor's office.

If scheduling, check-in and healthcare visits are happening online, then these virtual environments are the new waiting rooms. Marketers need to find innovative ways to embed content into these new operational and clinical workflows, as well as new tools to engage patients in these spaces.

About Phreesia Life Sciences

Phreesia empowers life sciences companies to connect meaningfully with clinically relevant patients, delivering targeted health content in a one-to-one setting. Our PatientConnect offering identifies and motivates the right patients to initiate meaningful brand conversations, and our PatientInsights product enables our clients to better understand their target patient populations.

Phreesia meets patients where they are, both virtually and in-person, and reaches them at multiple touchpoints throughout their healthcare journey.

To learn more about Phreesia Life Sciences, visit lifesciences.phreesia.com

End notes

- 1, 2) ["The Impact of COVID-19 on Outpatient Visits in 2020: Visits Remained Stable, Despite a Late Surge in Cases"](#) *The Commonwealth Fund*, February 2021.
- 3) ["Elevating the patient experience to fuel growth,"](#) *Accenture*, November 2020.
- 4) ["Pandemic has made shortage of health care workers even worse, say experts,"](#) *ABC News*, May 2021.
- 5) Phreesia survey data
- 6) ["Health Officials Scramble to Provide Booking Systems for Covid-19 Vaccines,"](#) *The Wall Street Journal*, January 2021.