



STATE OF HEALTHCARE

Insights and trends from more than **1,200 patients** and **165 healthcare providers** across the nation reveal COVID-19 is expected to continue impacting patients and providers for months to years

LUMA HEALTH RESEARCH

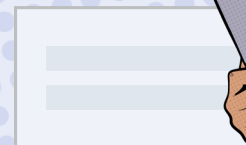
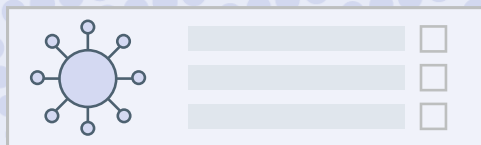


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INTRODUCTION

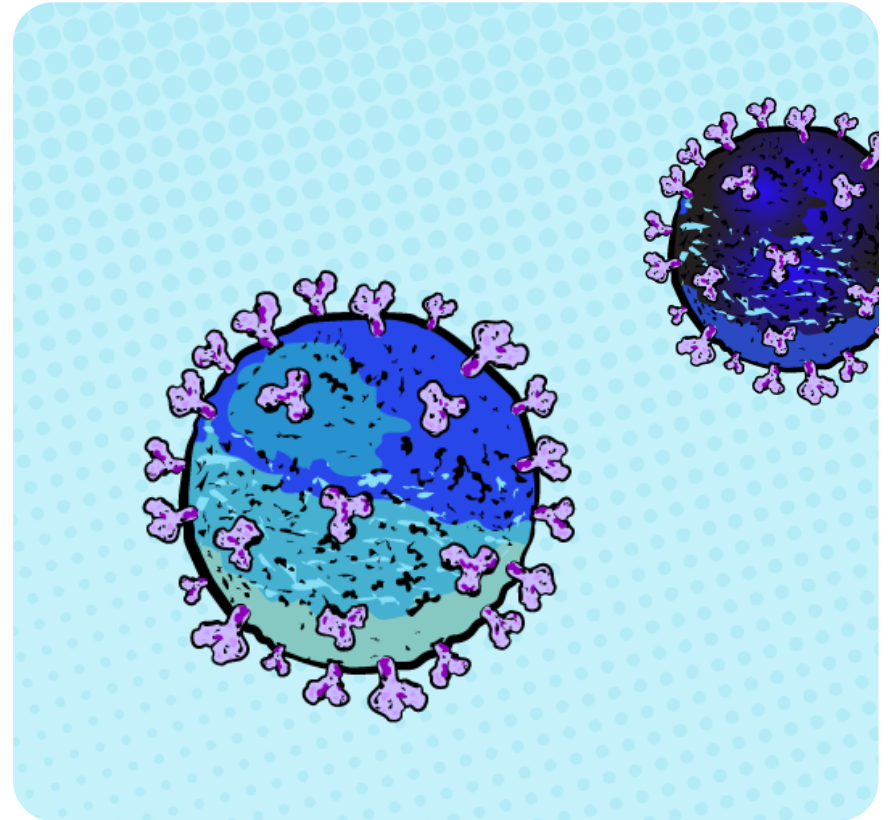
EXAMINING THE IMPACT OF COVID-19 ON PATIENTS AND PROVIDERS

For nearly the entirety of 2020, the U.S. has been battling COVID-19. Millions of Americans have been infected. The healthcare industry is working feverishly to not only care for those sickened by COVID-19, but also to prevent its spread as much as possible and minimize disruptions to normal patient care.

After months of responding to the crisis, healthcare looks very different than it did before the pandemic began. Healthcare organizations have implemented new safety protocols, adopted innovative new digital health technologies, rapidly increased use of telehealth, and made countless other changes in response to COVID-19. All of these changes to care management and delivery are impacting patients' healthcare experiences.

This report is meant to examine the impact of COVID-19 on patients and healthcare organizations, uncover lessons from healthcare's response, and show what expectations Americans have for healthcare's new normal.

Unless otherwise noted, all data shared in the report reflects survey research conducted by Luma Health.



ABOUT THIS REPORT

Luma Health conducted a pair of online surveys in August and September of 2020 to gain insights about the effects of the COVID-19 pandemic on healthcare organizations and patients. The surveys captured responses from participants across the U.S.

THE SURVEYS AIMED TO CLARIFY:

- 1 How patients and healthcare organizations have been impacted by the pandemic
- 2 What healthcare is doing to adapt
- 3 What patients and providers expect healthcare to be like in the future and what that means in terms of care delivery innovation

PATIENTS

1,293 adult patients (age 18+) with representatives from all 50 U.S. states



56% Female

44% Male



32% Urban residents

25% Rural residents

43% Suburban residents

HEALTHCARE PROVIDERS

165 healthcare providers (including MDs, DOs, NPs, nurses, licensed mid-level providers, healthcare executives, and healthcare staff)



Participants from

- FQHC and community health
- Hospitals and health systems
- Academic health centers
- Other healthcare organizations
- Primary care
- Urgent care
- Specialty clinics



50% Urban clinics/hospitals

34% Rural clinics/hospitals

16% Suburban clinics/hospitals

HOW COVID-19 IS AFFECTING PATIENT HEALTH



PATIENT FEAR PERSISTS

For patients, seeing a healthcare provider and getting care is more complicated now due to COVID-19. Not only are patients worried about contracting COVID-19, they are concerned about safely getting care for health issues unrelated to COVID-19.

In general, nearly half of patients (47%) agree that staying healthy is a struggle.

The pandemic is making it even more difficult for patients to maintain their health. For most of 2020, patients have been contending with care disruptions, clinic closures, and an onslaught of confusing and conflicting information related to the pandemic.

As a result, patients report that their health is being impacted because they feel nervous about going to the doctor, less confident in healthcare, and more mentally strained.

PATIENTS FEEL LESS CONFIDENT IN HEALTHCARE



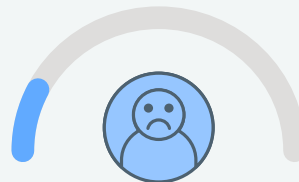
33% of patients
feel less confident in healthcare now
vs. before the pandemic

NERVOUSNESS IS IMPACTING HEALTH



38% of patients
say their health has been impacted because they
are nervous about going to the doctor and
potentially being exposed to COVID-19

SOME PATIENTS ARE MORE FEARFUL



17% of patients
feel more scared about healthcare now
vs. before the COVID-19 pandemic

MENTAL HEALTH HAS DECLINED IN MORE THAN 1 IN 4 PATIENTS



26% of patients
say their mental health has declined
since the start of the pandemic

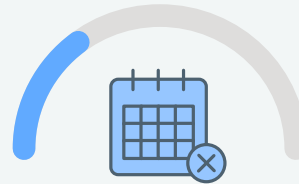
MISSED CARE IS IMPACTING PATIENTS' HEALTH

Many patients report the pandemic is impacting their health, but not necessarily because they contracted COVID-19.

More than one in three patients' health has been impacted because they missed healthcare appointments that were cancelled by them or their doctors.

Unfortunately, between public health mandates, temporary clinic closures, and patients' concerns about being exposed to COVID-19, too many patients are missing important appointments for routine exams and screenings, chronic care check-ins, elective procedures, and other types of care.

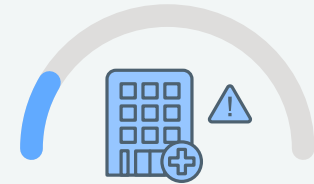
MISSED APPOINTMENTS IMPACT MORE THAN 1 IN 3 PATIENTS



35% of patients

say their health has been impacted by COVID-19 because they missed healthcare appointments

DELAYED CARE NEGATIVELY IMPACTING PATIENT HEALTH



14% of patients

say COVID-19 has impacted their health because they've had to defer surgeries or procedures

URBAN AND SUBURBAN AREAS ARE MOST AFFECTED

% of patients that say their health has been impacted because of missed appointments



- **37% Living in cities or urban areas**
- **36% Living in suburban areas**
- **31% Living in small towns or rural areas**

CONCERNS ABOUT COVID-19 ARE INFLUENCING PATIENTS' DECISIONS ABOUT GETTING CARE



Nearly a quarter of patients say they've been sick or injured but actively avoided medical care during the pandemic.¹



42% of patients say they plan to delay care until they have a serious health concern.¹

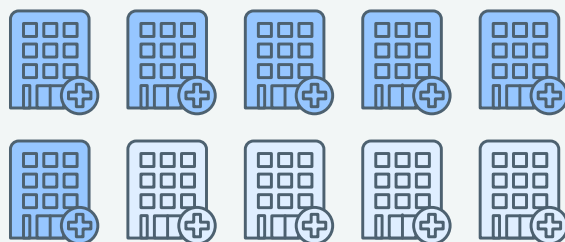
THE POTENTIAL FOR WORSENING HEALTH OUTCOMES IS INCREASING

There are consequences to patients not getting the care they need. Unfortunately, the longer care is pushed back, the greater the likelihood that more and more patients will experience negative health outcomes.

Nearly a quarter of healthcare professionals (24%) have already seen a decline in their patients' health.

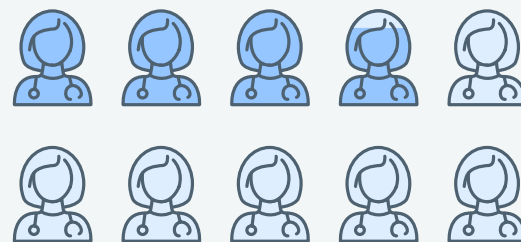
This is particularly true for patients with chronic illnesses and those who are known to be high-risk for diseases. In fact, health has worsened since the pandemic began for more than 1 in 10 patients with a chronic condition. Engaging patients to help them weigh the risks of delaying care is becoming more important.

PROVIDERS FORESEE INCREASED HEALTH ISSUES



60%+ of healthcare clinicians

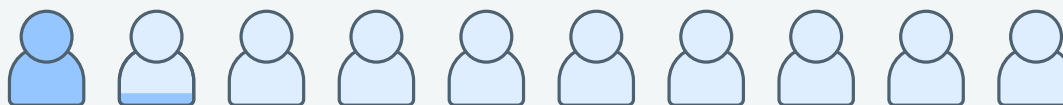
believe that some of their patients will experience avoidable illness due to diverted or avoided care during the pandemic ⁱⁱⁱ



38% of clinicians

believe that because care is being diverted or completely avoided, there will be non-COVID-19 related deaths among their patients after the pandemic ends ^{iv}

CHRONIC CONDITIONS ARE WORSENING IN SOME PATIENTS



More than 1 in 10 patients (11%)

with a common chronic health condition say their condition has worsened during the pandemic

THE PANDEMIC'S EFFECTS ON HEALTHCARE ORGANIZATIONS



COVID-FUELED CARE DISRUPTIONS ARE CREATING CHALLENGES

Fewer patients are scheduling and keeping appointments. Some elective procedures have been halted to conserve resources. Unfortunately, many clinics and hospitals are seeing fewer patients during the pandemic.

As a result, revenue is down, and furloughs and layoffs have become common.

HOW COVID-19 IS IMPACTING HEALTHCARE ORGANIZATIONS

% of healthcare professionals that say they are experiencing the following due to COVID-19



Increased use of telehealth

83%



Patients are struggling to access the care they need

39%



Lower patient volumes

53%



Staffing shortages

38%



More patients calling with questions, concerns, or to cancel or reschedule appointments

52%



More “no shows”

28%



Staffing furloughs or layoffs

43%



Their office closed temporarily

15%



Increased engagement efforts to stay in contact with patients from a distance

41%



An overwhelming flow of COVID patients

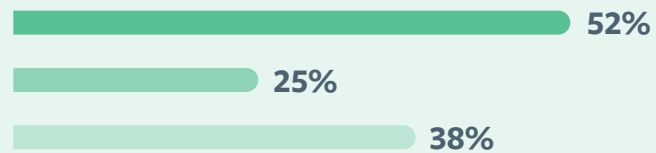
9%

EXPERIENCES ARE VARYING GEOGRAPHICALLY



Urban clinics/hospitals

More furloughs and layoffs are reported by healthcare organizations in urban areas



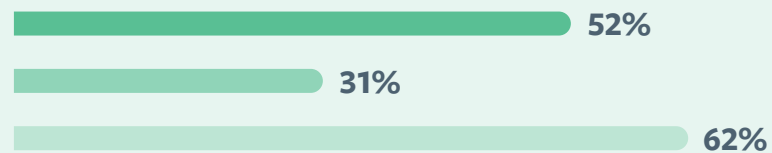
Suburban clinics/hospitals

More healthcare organizations in suburban areas are experiencing decreased patient volume



Rural clinics/hospitals

Greater reports of increased call volumes in rural areas



OPERATING BELOW CAPACITY PUTS HEALTHCARE ORGANIZATIONS IN JEOPARDY

With fewer patients receiving care, and many hospitals and clinics operating below their normal capacity, financial challenges are mounting.

Of those healthcare professionals with knowledge of operating capacity, only 10% say their organization is operating at or above capacity.

Nearly a third of healthcare professionals (32%) estimate their organization is operating below 60% of normal capacity.

Unfortunately, this is causing concerns about the viability of some healthcare organizations.

FEW HEALTHCARE ORGANIZATIONS ARE OPERATING AT FULL CAPACITY

Sustained revenue loss is a looming threat for healthcare teams that consistently operate below capacity.



- 10% - At or above 100% capacity
- 34% - Between 80-99% of their capacity
- 24% - Between 60-80% of their capacity
- 32% - Operating below 60% of their capacity

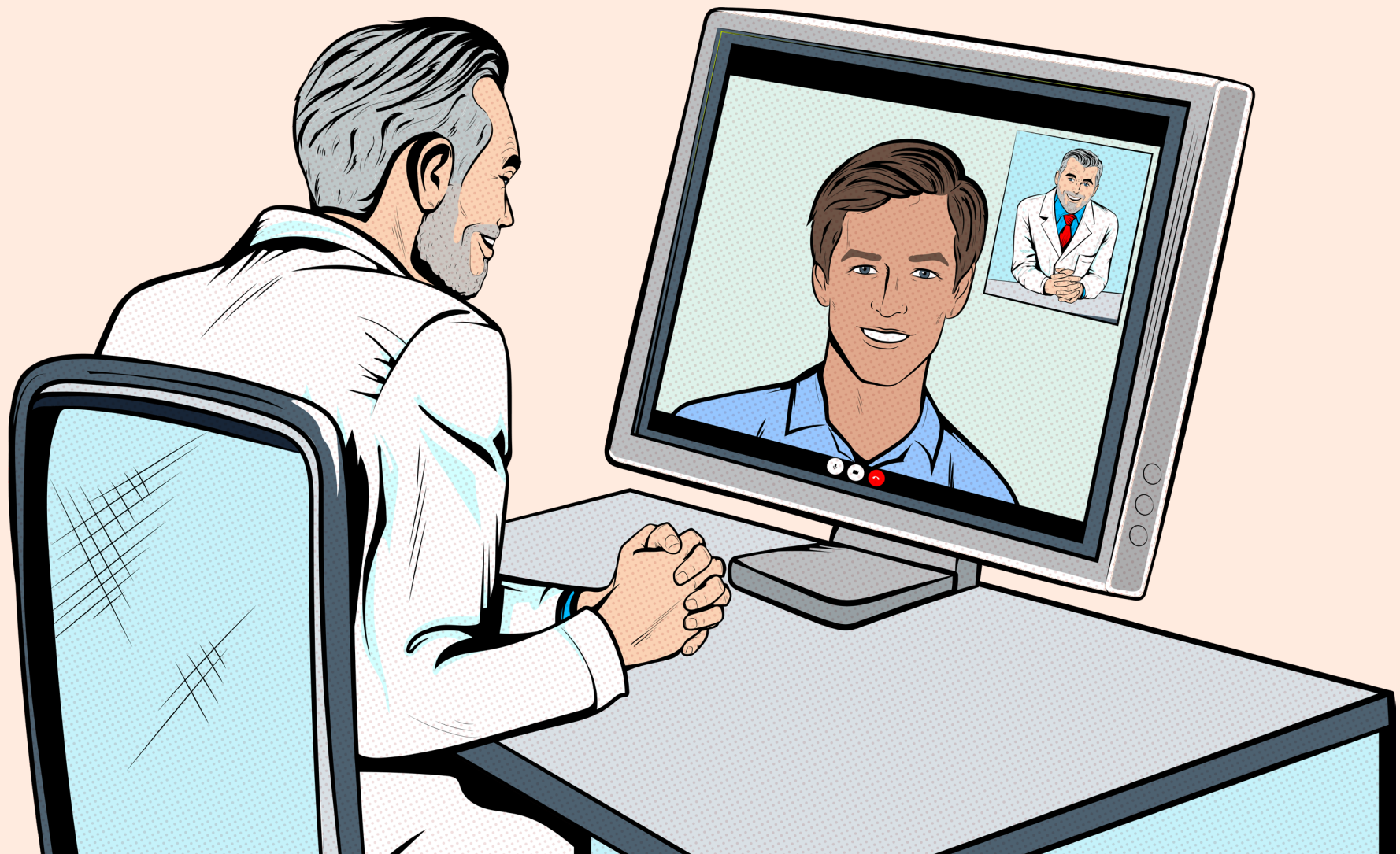
26% OF HEALTHCARE ORGANIZATIONS ARE AT RISK OF CLOSING IN A YEAR OR LESS

Healthcare professionals were asked “If COVID-19 continues to disrupt care and cause revenue to decrease, how long could your organization survive before having to close?”



- 19% - 6 months or less
- 7% - 1 year
- 35% - More than 1 year
- 39% - Uncertain

HEALTHCARE ORGANIZATIONS ADAPT QUICKLY



HEALTHCARE ORGANIZATIONS INNOVATE FASTER THAN EVER

The pandemic forced healthcare teams to rush to make changes to protect staff and patients. In response to the crisis, many organizations initially reacted by adopting solutions they could implement quickly and easily.

More than two in three healthcare professionals (67%) are confident that the safety and sanitation procedures put in place in their office effectively minimize risks of COVID-19 exposure for patients and staff.

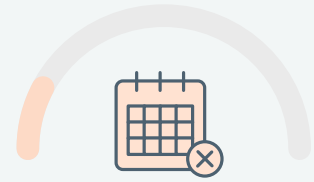
As the pandemic continues, healthcare organizations are exploring more ways to address patients' safety concerns and minimize care disruptions. Zero contact check-in, curbside care, and telehealth are a few examples.

HELPING PATIENTS SAFELY AND CONFIDENTLY ACCESS CARE IS A PRIORITY



64% of patients

are only somewhat confident at best that there is minimal risk of COVID-19 exposure when visiting a healthcare provider (doctor's office, healthcare clinic, or hospital)



18% of patients

have cancelled a healthcare appointment due to safety concerns related to COVID-19

HIGH DEMAND FOR PROVIDERS TO MONITOR PATIENT HEALTH REMOTELY



94% of patients

say that if they had a chronic condition it would be beneficial to have their doctor monitor their condition between in-person appointments using digital surveys that enable them to self-report their health metrics

HEALTHCARE TEAMS ARE SWIFTLY ADOPTING NEW SAFETY POLICIES

% of healthcare teams that say they have implemented the following to promote social distancing and help patients feel confident that it is safe to seek care



Enhanced sanitation processes

85%



Required temperature checks for patients at the front door upon arrival

83%



Rescheduled in-person appointments to telehealth appointments

66%



Implemented zero contact check-in

45%



Implemented zero contact waiting rooms

41%



Sent patients screening surveys prior to appointments

40%



Offered curbside care

33%



Offered special appointment times for older or high-risk patients

26%



Reduced the number of hours their clinic is open to patients

26%

DEMAND FOR TELEHEALTH EXPLODES

Healthcare organizations quickly realized that telehealth can be used to deliver care to patients who are unable or unwilling to visit clinics in person.

Once restrictions were loosened to allow healthcare providers greater opportunities for telehealth reimbursement, many moved quickly to expand their use of telehealth.

9 in 10 healthcare providers now offer telehealth

For some healthcare organizations, this has meant adopting a new telehealth solution.

In most cases, patients are supporting the push for telehealth and have embraced using it. And more patients who have used telehealth report being satisfied vs. dissatisfied with their telehealth experiences.

PROVIDERS' TELEHEALTH USAGE DURING THE PANDEMIC



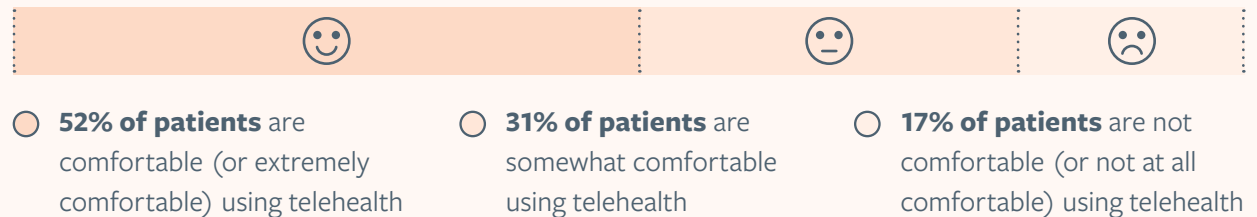
83% of providers
have increased their
use of telehealth



60% of providers
say that currently more than **20% of their appointments**
are currently being conducted via telehealth

PATIENTS HAVE QUICKLY GROWN COMFORTABLE WITH TELEHEALTH

% of patients who feel comfortable with telehealth



A MAJORITY OF PATIENTS ARE SATISFIED WITH THEIR TELEHEALTH EXPERIENCE

% of patients who have used telehealth and are satisfied with their experience



NEW CARE DELIVERY INNOVATION: EMERGENCY DEPARTMENT VIRTUAL VISITS



90% of patients

say it would be useful for hospital emergency rooms to offer virtual visits upon arrival to get them the care they need quickly

45+ PATIENT POPULATION ADOPTS TELEHEALTH



56% of patients age 60+ say they expect to use telehealth more in the future



65% of patients age 45-60 expect their telehealth usage to increase moving forward

COVID'S IMPACT EXPECTED TO LAST MONTHS, YEARS



COVID-19'S IMPACT EXPECTED TO LAST MONTHS, YEARS

Many healthcare professionals are bracing for continued disruptions, with 91% of providers fully expecting continued care disruptions.

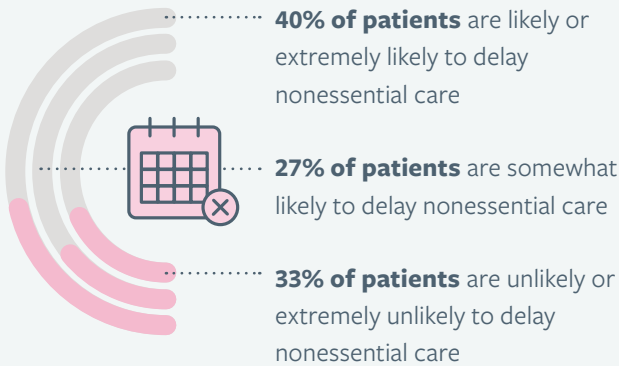
Two in five healthcare professionals (40%) expect to see care disruptions and appointment cancellations related to COVID-19 for the next year or more.

Patients confirm that another six months or more of disruptions are possible. In fact, more than two in three patients say it is at least somewhat likely that they will delay nonessential healthcare exams, screenings, or procedures in the next six months due to concerns about COVID-19.

Nearly 20% of healthcare professionals believe their organization will be impacted by COVID-related disruptions and appointment cancellations until a vaccine for the virus is available.

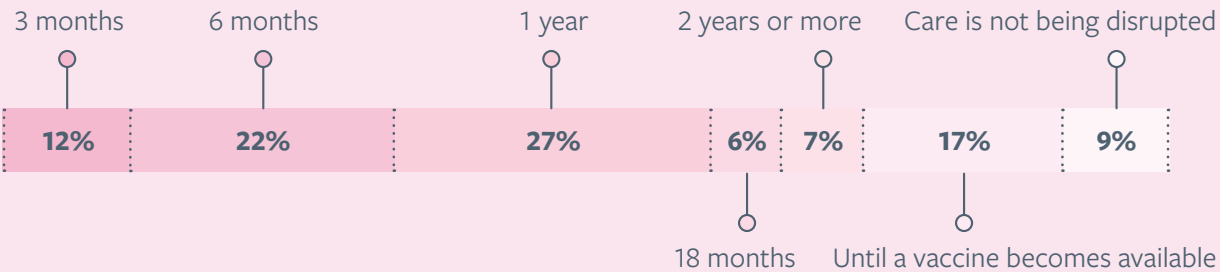
While there have been some key lessons learned thus far, a lot is still unknown about COVID-19. For example, one of the most frequently asked questions “When will the pandemic end?” doesn’t yet have a clear answer.

PATIENTS INDICATE CONTINUED CARE DISRUPTIONS

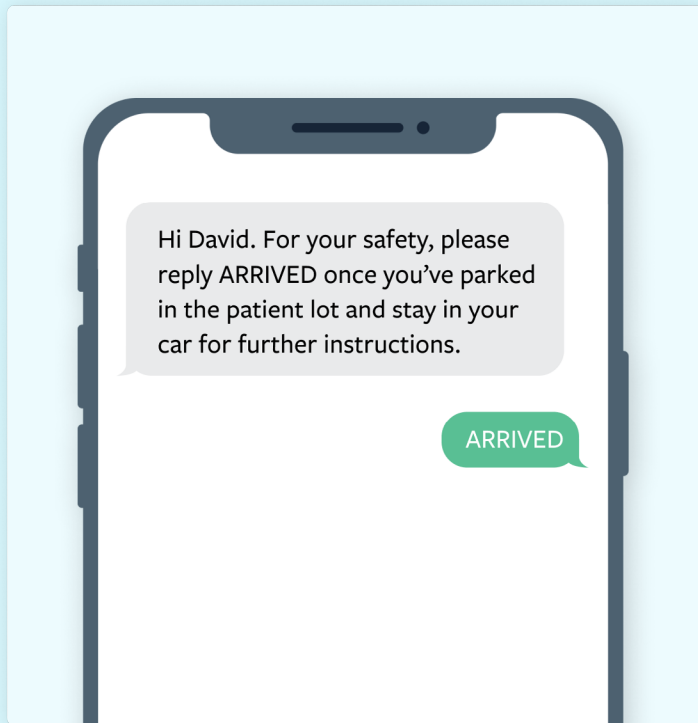


2 IN 5 EXPECT ANOTHER YEAR OR MORE OF DISRUPTION

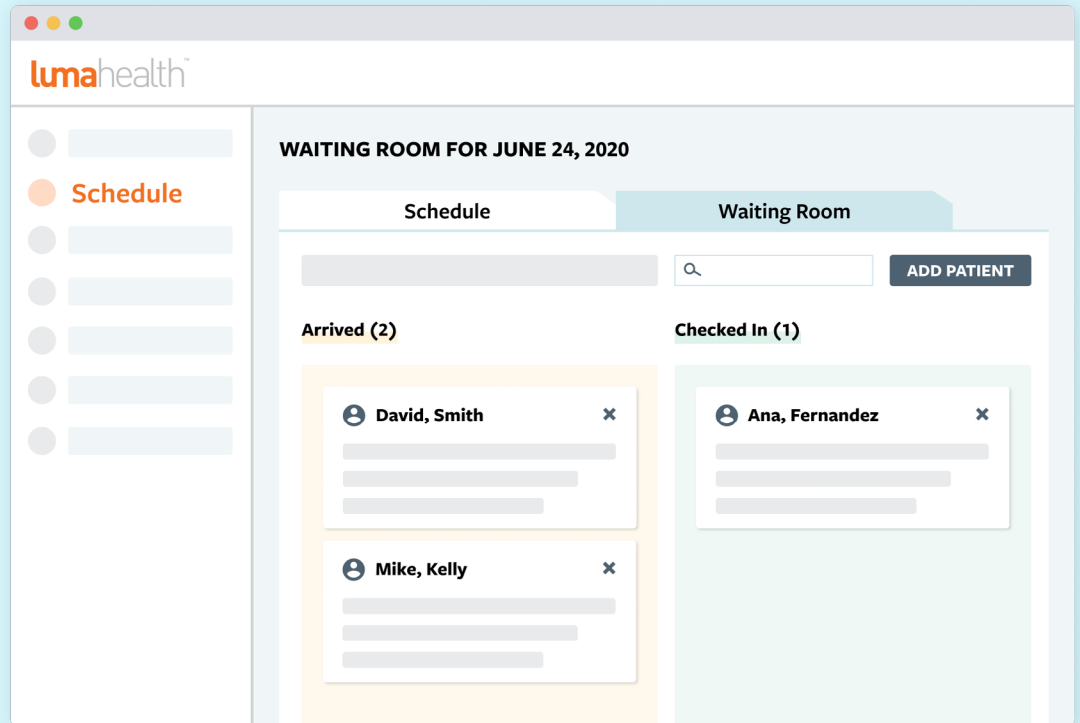
% of healthcare professionals who expect care disruptions to continue for a period of time



DIGITAL HEALTH SOLUTIONS HELP SOLVE CARE DELIVERY CHALLENGES



PATIENT VIEW



CLINIC VIEW

DIGITAL HEALTH SOLUTIONS FILL AN IMPORTANT ROLE

Patient feedback suggests care delivery innovations such as telehealth, curbside care, and zero contact check-in are promising long-term digital health solutions.

HOSPITALS COULD MAKE PATIENTS MORE COMFORTABLE AND WILLING TO SEEK CARE

% of patients that say hospitals could make them feel less worried about COVID-19 exposure risks by doing the following



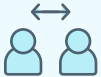
Designating a separate entrance and treatment area of the building for COVID-19 patients

64%



Sharing information about COVID-19 preventive policies before patients arrive at the hospital

45%



Enforcing social distancing in lobbies and waiting areas

57%



Offering special appointment times for older or high-risk patients

44%



Providing additional hand sanitizer stations and masks for patients

57%



Offering curbside care and zero contact check-in

40%



Adjusting scheduling so fewer patients are in lobbies and waiting areas at once

50%



Limiting visitors and caretakers to one per patient

39%

CURBSIDE SERVICES CAN HELP ENSURE PATIENTS DON'T MISS NEEDED CARE

% of patients interested in receiving the following types of healthcare services curbside



53% - Blood pressure check



47% - Immunization



35% - Cholesterol screening



23% - Depression screening



19% - Obesity screening

TELEHEALTH IS HERE TO STAY



FINDING THE RIGHT TELEHEALTH SOLUTION IS KEY

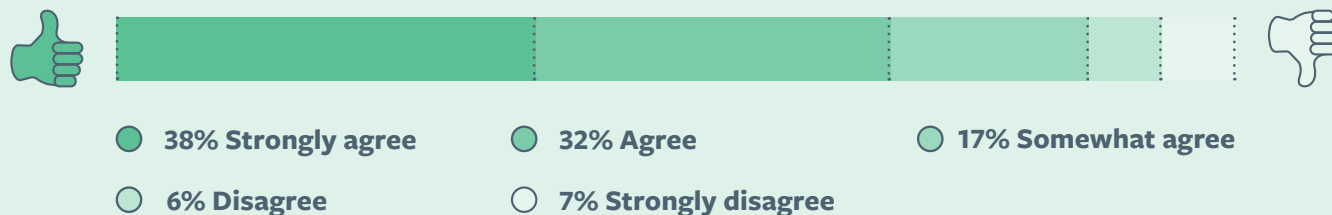
Telehealth's popularity rose quickly during the pandemic. Obviously, it is appealing because it enables healthcare teams to deliver care to patients safely. Those healthcare teams that raced to invest in telehealth hope it continues to be used as a regular mode of delivering care.

According to many patients and healthcare professionals, telehealth has long-term potential — but the technology and process must be simple, user-friendly, and reliable.

For the best results, healthcare organizations that raced to implement a telehealth solution need to make sure that the solution actually works well for both patients and doctors.

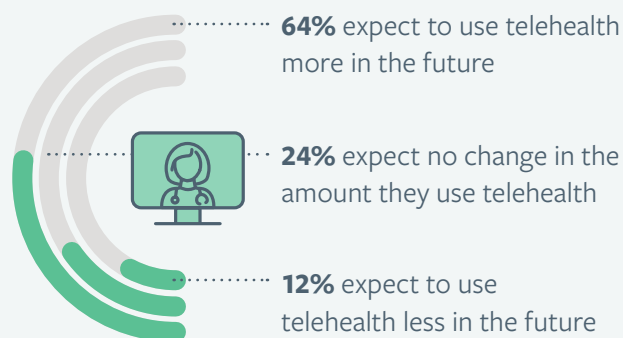
TELEHEALTH IS HERE TO STAY

% of providers who agree the use of telehealth will be permanent, even after the pandemic ends



PATIENTS AGREE TELEHEALTH WILL REMAIN POPULAR

Of those patients who have used telehealth



PATIENTS VIEW TELEHEALTH AS A SAFE HEALTHCARE OPTION



More than half of patients (53%) say they would use telehealth to avoid potential exposure to COVID-19

IMPROVED PROVIDER-PATIENT COMMUNICATION IS KEY



PATIENT ENGAGEMENT IS A SUCCESS FACTOR

The key to the long-term success of all of the new processes and solutions healthcare teams have adopted — from curbside care to telehealth — is communication.

There's a disconnect between patients and providers when it comes to communications that explain the steps providers are taking to protect them from COVID-19.

Improvement in this area is one way healthcare organizations can work to overcome COVID-related challenges — such as lost revenue and declining patient health due to missed appointments.

HEALTHCARE PROVIDERS FEEL COMMUNICATION IS SUFFICIENT



70% of healthcare professionals

feel their practice's efforts when it comes to communicating COVID-related news to patients is either good or excellent

PATIENTS REVEAL HEALTHCARE TEAMS HAVE OPPORTUNITIES TO IMPROVE COMMUNICATION



While **1 in 3 healthcare professionals** say their organization has introduced curbside care, **only 15% of patients** have received communication about the availability of curbside care



2 in 3 healthcare professionals say their organization is rescheduling in-person appointments to telehealth, yet **just 41% of patients** have received communication about switching an appointment to telehealth

HOSPITALS COULD MAKE PATIENTS MORE COMFORTABLE AND WILLING TO SEEK CARE

% of patients who say they have received communication about the following during the pandemic



SOME PATIENTS SAY PROVIDER COMMUNICATION IS ABSENT



More than 1 in 10 patients (13%) say they have not received communication from their healthcare provider about processes or procedures that are in place to prevent the spread of coronavirus and ensure safety during in-person appointments

ABOUT LUMA HEALTH

Luma Health's easy-to-use digital health solutions help clinics and healthcare practitioners rapidly deploy patient engagement communications and deliver needed care. By utilizing the Luma Health Total Patient Engagement Platform™, specialty clinics, FQHCs, primary care physicians and large health systems can send patient messaging via text, email and phone to share essential information and maximize access to care. Providers across the U.S. are using Luma Health's Total Patient Engagement Platform™ to manage schedules, screen patients and deliver care to patients via virtual visits.

BOOK A DEMO TODAY

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