RISE/Engagys COVID-19 Response Survey II Results

Overview

As the pandemic continues to evolve, so too does the healthcare industry's response. As states reopen in varying degrees, concerns surrounding health consumer engagement abound. Many health consumers are scared and not receiving the preventive care, and in some cases chronic care treatments, they so desperately need. While most experts agree that deferring such care will result in catastrophe, the healthcare industry has yet to determine the most effective way to communicate the need to consumers.

Following our April survey, RISE and Engagys have again collaborated, reaching out to health plans and others to help industry peers leverage one another's experience during this challenging time. The second installment of this brief survey queried industry professionals to determine how their communication tactics may have changed as the pandemic develops.

Specifically, this instrument focused on communications prioritization and channels, messaging and focus, and ongoing communications strategies. As promised, the results of the survey have been consolidated and are summarized here for your review.

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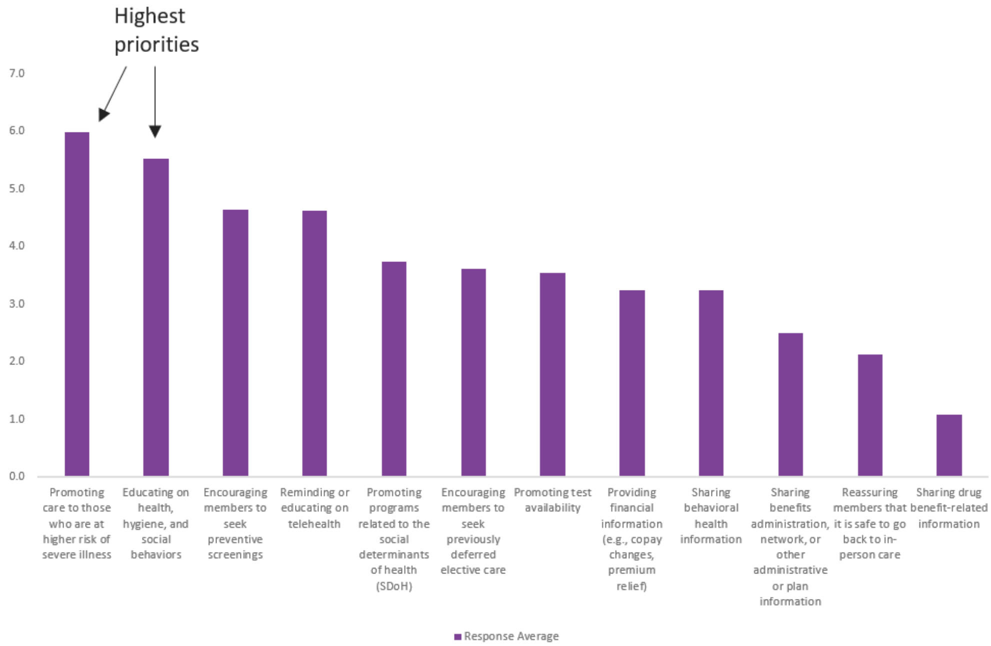
Methodology

The survey instrument was open for respondents from July 21-25, 2020. RISE and Engagys surveyed healthcare industry experts from across the country via email. Participants included executives from healthcare entities that spanned engagement and experience, operations, clinical and administrative responsibilities.

Consolidated Survey Results

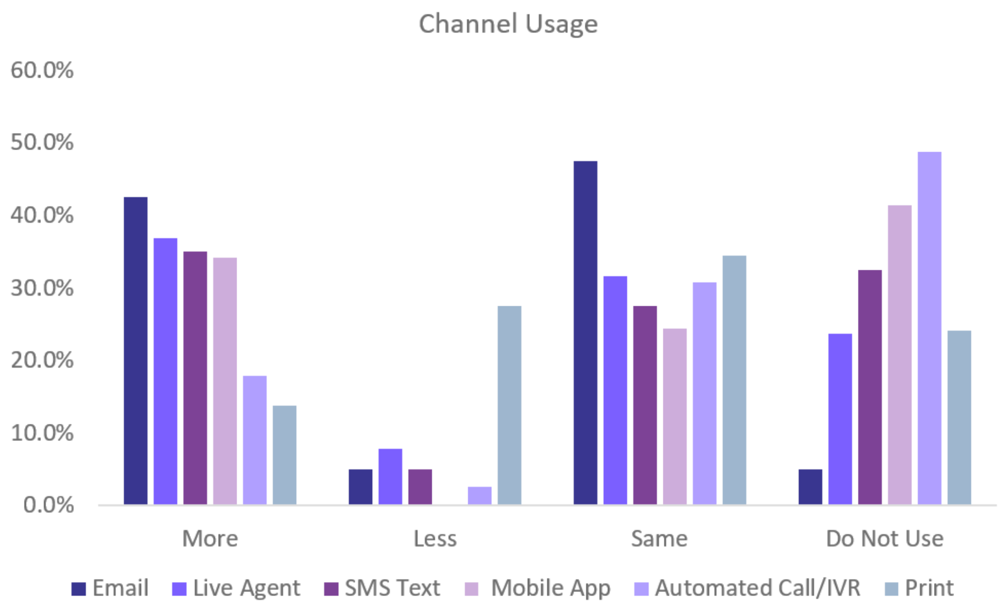
1) What are the most important communications topics that you are prioritizing from this point on during this pandemic? Please rank in order.



Similar to the results of our April survey, communications related to health and hygiene are still at the forefront. Although we are now several months into the pandemic, in some regions (perhaps due to mixed political messaging) health entities still feel this messaging is important. Additionally, communications related to health plan benefits has dropped since our last survey. It is surmised that due to the decreasing number of appointments being made by consumers that this messaging has waned.

Engagys Insight: It is no surprise that provider systems' most important task at hand is getting consumers back into care, yet health plans are also reporting that driving high-risk members, those who have deferred care and members with gaps in screenings back into care will become the most important communication topics from this point on in the pandemic.

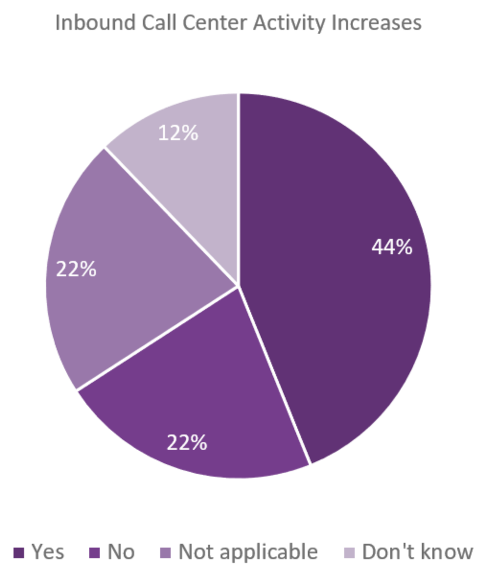
2) Has your outbound communication channel mix changed since COVID-19 started? Please check all that apply.



In our previous survey, live agent outreach was the primary mechanism followed by print and social media. As the pandemic has changed so too have the optimal methods of outreach. Consumer fears around handling and opening mail may have prompted an increased use of digital outreach options although print is still being used regularly. Additionally, mobile apps have leapt ahead—current respondents indicated email is used as the primary outreach channel today, closely followed by live agents and mobile apps. Yet surprisingly, over 40% of respondents are not yet using mobile apps at all.

Engagys Insight: Microsoft CEO Satya Nadella recently stated, "We've seen two years' worth of digital transformation in two months." Grandma is on zoom regularly to see the grandkids and telehealth has exploded. Although print has seen a decline thanks to digital channel use, 50% of health plans report sending out the same or more of print. Based on Engagys client work, we believe this is due to the challenges of understanding print inventory and the switching costs associated with migrating to digital—seems easier than it really is. The good news is that our survey has shown that many health plans report having increased their use of digital channels, with 43% reporting an increased use of email and 35% reporting an increased use of SMS text. The disappointing news: A third of health plans reported not using SMS text at all.

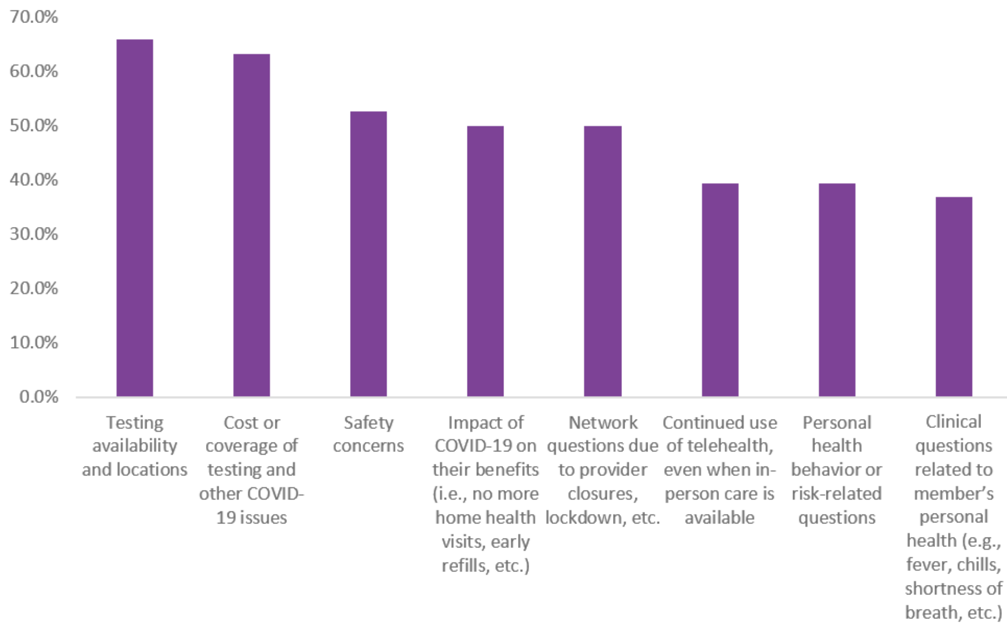
3) Have you seen an increase in overall inbound call center activity in the last 30 – 60 days?



Almost half of the health plans surveyed reported increased (44%) call center activity in the last 30-60 days.

Engagys Insight: This reported increase comes at a time during a rapidly changing environment, shifting priorities from deferring care to encouraging care, a geographically diverse landscape of lockdown, changing hospital capacity, increased access to testing locations and more. Adding to an already challenging environment is the inability of the now remote call center workforce to connect over the cube to ask more senior representatives questions on the fly. Pressure will be on to promote consistent knowledge management, with the ability to dynamically update and share new information as the environment continues to shift.

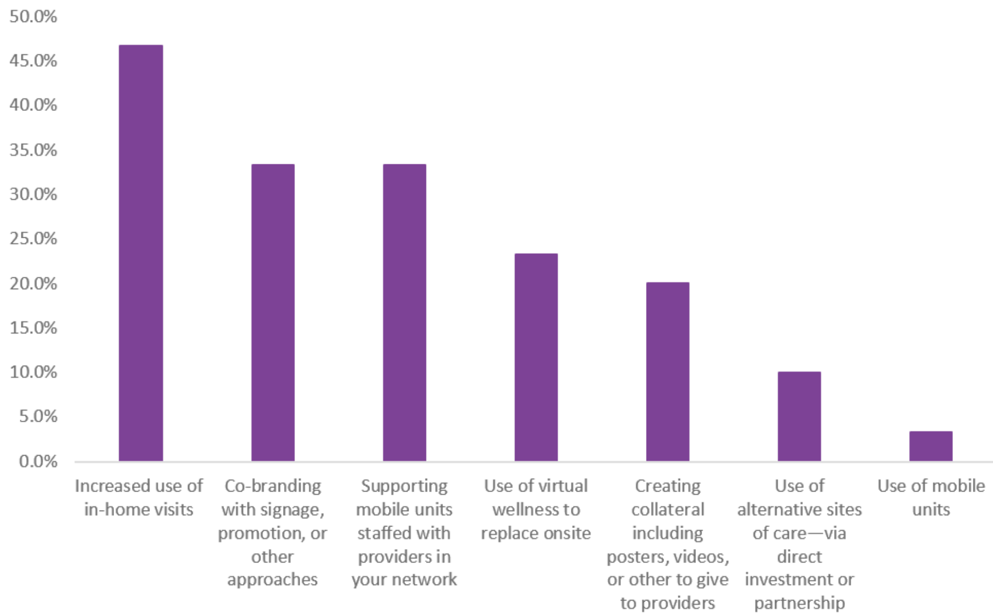
4) Whether or not you have seen an increase, what are the COVID-19 topics people are calling about? Please check all that apply.



Overwhelmingly, respondents reported that inbound calls were related primarily to testing availability and locations as well as cost and coverage questions around COVID-19 concerns or issues.

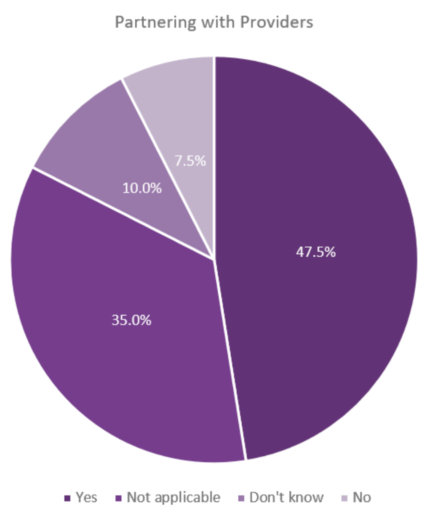
Engagys Insight: Call center interactions are on the front lines of consumer engagement across all population types. And as we face new Medicare patient experience weighting from CMS, it becomes even more critical that we make every interaction for consumers productive and helpful. The data is telling us that even having lived with the pandemic for half a year, COVID-19 is still the topic on everyone's minds. Ensuring that your call center representatives have efficient, automated tools to assist them in giving members the answers they need in real time will be critical to deliver on the promise of consumer experience.

5) Are you supporting any of the following initiatives to assist in drawing members back into care settings? Please check all that apply.

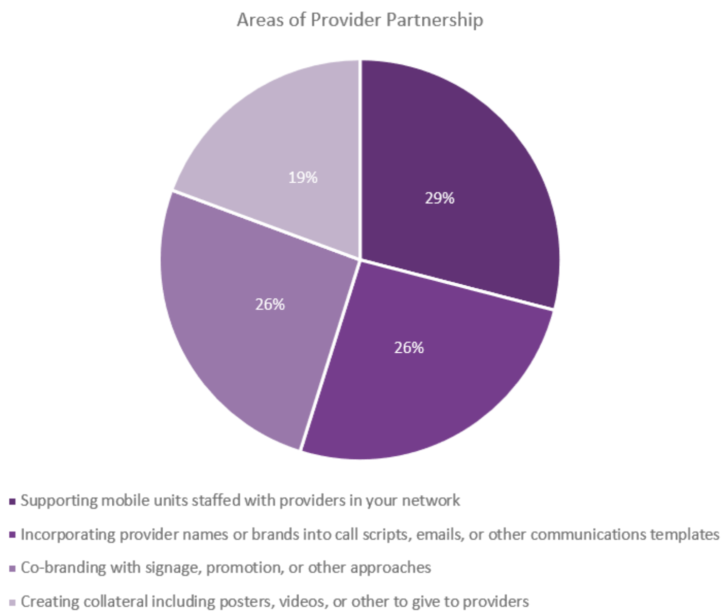


Undoubtedly, an increased use of in-home visits was respondents' primary initiative related to ensuring members receive necessary care. Taking this response in conjunction with the next two sets of respondent answers demonstrates the importance of collaboration between payers and providers:

6) Are you partnering with providers to help members seek care?

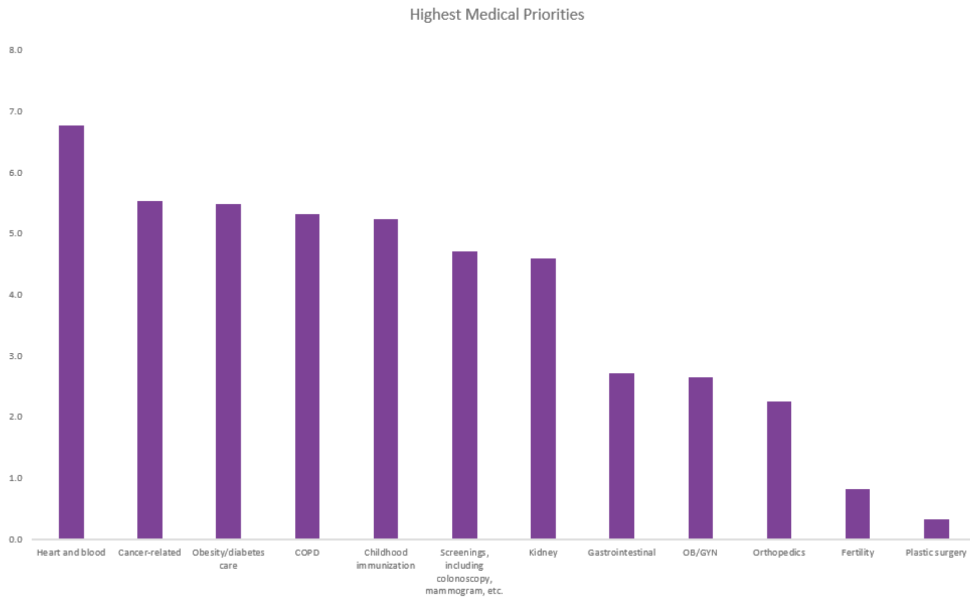


7) Since you are partnering with providers to help members seek care, please check all that apply.



Engagys Insight: Partnering with providers is more important than ever to drive health consumers back into care. Early studies demonstrated that when hospital systems cancelled all elective procedures, consumers were left with the impression that it was not safe to visit. In reality, providers were trying to conserve PPE. As an industry we need to overcome the barriers that are in consumers' minds today. Lifting those barriers is the only way we will prevent a tsunami of health costs and poor outcomes in years to come. Data show health plans beginning to implement creative initiatives to tackle this challenge: co-branding with providers, increased in-home visits, and mobile units to name a few.

8) Which medical situations are your highest priority for patient re-engagement? Please rank in order.

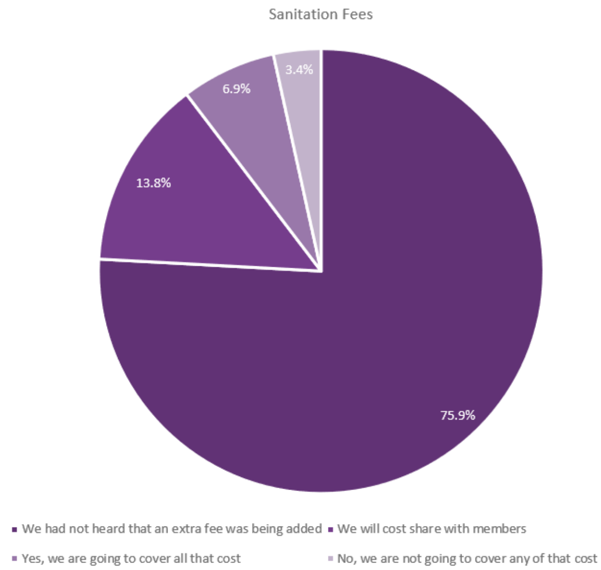


Respondents reported heart and blood related communications as the top priority, followed by cancer and obesity/diabetes-related outreach.

Engagys Insight: Given what we have learned about COVID-19 thus far, it is not surprising that condition communication has centered on those issues that may be most negatively impacted by the virus. Targeted, effective communications have become critical now for those members with serious conditions such as cancer and those that require ongoing care, such as diabetes. It is imperative that these members get back in to see physicians for care.

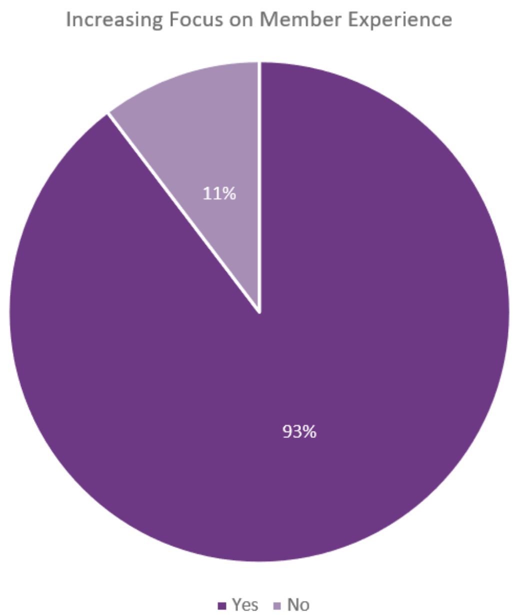
In contrast, plastic surgeons may be the last in terms of real need, but they are a typically "cash and carry" business that has been proactive in advertising safety. Additionally, fertility-related needs may be in a bit of a holding pattern as it is widely known that birthrates decline in times of recessions, let alone in a pandemic.

9) Patients are reporting that providers are adding a COVID-19 sanitation fee in addition to their co-pay. Do you have plans to subsidize that cost?



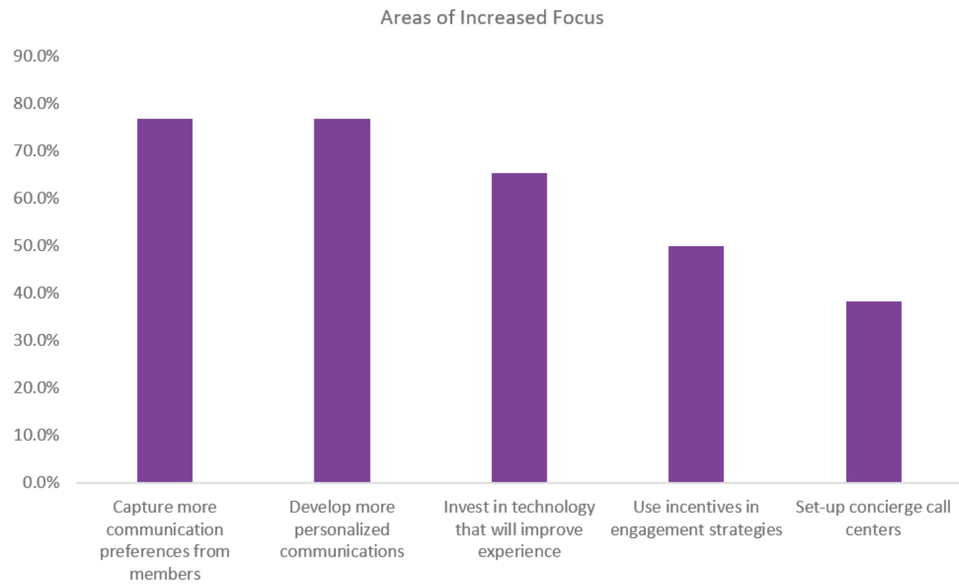
Engagys Insight: In a recent Engagys-moderated panel discussion with health consumers that cited living with barriers in their social determinants of health, panelists explained that they were being surprise billed with a "COVID-19 sanitation fee" at the provider office. The expectation was that this fee was to be paid alongside their co-pay at point of care. For most of the health plans in attendance at this panel, this fee was surprise news. This study further validates that payors are not in sync with provider charges here as 76%, were unaware of this fee.

10) CMS just announced that the member experience-related Stars measures will move from a 2x weighting to 4x. Do you anticipate increasing your focus on member experience?



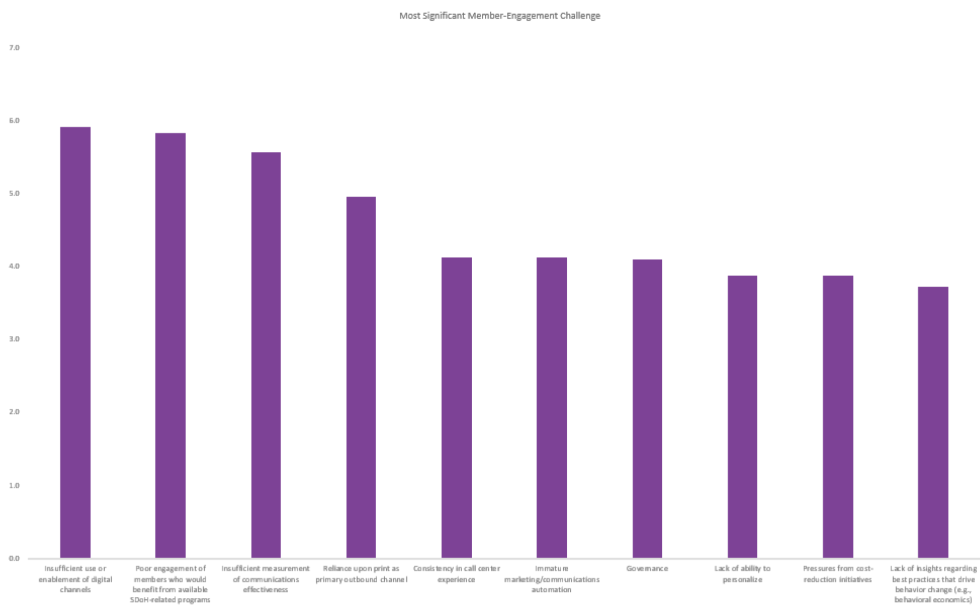
Engagys Insight: While this response might be expected, the challenge will be in attending to the details of how to increase member experience when so much is attributed to the point of care. Health plans have an incredible opportunity to focus and improve what they can control, namely the day-in and day-out interactions and communications that they have with their members. By personalizing outreach, adding next best actions, respecting preferences, and more, health plans can make great strides to improve the member experience.

11) Since you are planning to increase your focus on member experience, please check all the areas that you anticipate increasing your focus on.



Engagys Insight: Respecting preferences and personalizing communications were cited most often as areas of increased focus. Personalization is the highest priority that plans can address for the future. Health is personal. This pandemic has showcased the challenge of working with current state infrastructure to quickly shift, adapt and personalize engagement. Investments in people and technology will be required.

12) Finally, what are your most significant member engagement-related challenges? Please rank in order.



Respondents noted the insufficient use or enablement of digital channels, poor engagement of members who would benefit from available SDoH-related programs and the insufficient measurement of communications effectiveness as the top issues related to member engagement.

Engagys Insight: Health plans have known for some time that member outreach must improve. Seeking the most efficient, cost effective and engaging communication method is the ongoing challenge. The movement away from print communications is critical. Leveraging digital channels that can be measured and optimized is the key to tuning communications. While other industries have utilized digital outreach and ongoing measurement for decades, healthcare has lagged. COVID-19 has pushed the industry to make change—fast. This crisis highlights the need to be flexible and adapt.

Summary and Next Steps

We believe the information collected by our recent survey efforts reinforces three unifying elements of consumer engagement strategy going forward in 2020:

1. COVID-19 has not changed the direction of any major consumer engagement-related trend. It has only accelerated existing trends. The move to telehealth is the most obvious, and the importance of leveraging digital channels more generally to interact with consumers in real time and at their convenience is just as important. Neither of these trends emerged because of COVID-19, but the urgency of taking action is greater as a result of COVID-19.
2. Conversely, health plan inertia is in the way of the above changes. Changing the approach to consumer interactions is confusing, difficult and expensive. The information collected suggests that plans understand the need, but struggle to make changes fast enough.

3. To overcome inertia, health plans will need to initiate, sponsor from the highest organizational elevation, and fund centralized efforts to improve consumer engagement and experience. We see health plans continuing to rely upon grass roots and often disjointed initiatives to effect change. This is insufficient. One great irony of the pandemic is the shift in MLR due to deferred elective procedures. Can health plans get creative and help offset their financial imbalance with investments aimed at improving infrastructure? We think so.

Interested in learning more about Engagys' work and how we can help your organization?

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The Engagys Team

Engagys is a healthcare consumer engagement advisory firm offering services to health plans, providers, and other healthcare enterprises. Our services include engagement strategy and design, technology selection and program management, and research and benchmarking. Our research practice delivers Engagys Insights through quantitative and qualitative consumer surveys, competitive benchmarking, focus groups, journey-mapping, and other projects.

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More than 20 years of experience in healthcare and technology. Has led and supported hundreds of healthcare consumer engagement projects. Former Welltok (Silverlink), Ernst & Young, and Johnson & Johnson.

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