

COVID-19: Returning to Care

The last in a series of weekly perspectives from physicians on the challenges of fighting Covid-19

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As lockdowns have started to ease around the world, we asked physicians about the opportunities and challenges they see around returning to regular practice. We've chosen to survey physicians about their needs and priorities for ensuring clinical safety and effectiveness. These findings are also important to understanding how health systems can help patients and physicians feel confident as they return to care.

As we move forward into a new normal in healthcare, we believe these learnings can be applied to any brand looking to enact positive transformation and demonstrate lessons learned from the most significant chapter in healthcare's recent history.

We understand that these are challenging times for all brand leaders, and so please know we're here to help you navigate. We hope that these findings can lead to new thinking and responses that help us all get to a safe and speedy resolution.

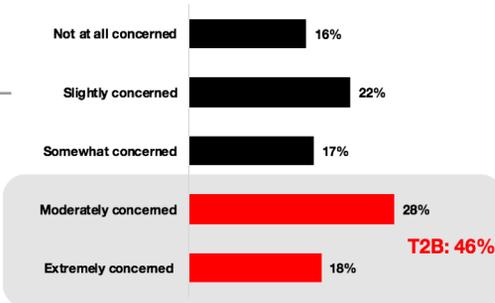
While the world focused on treating COVID-19 patients, the rest of healthcare largely ground a halt. Patients and physicians alike postponed essential and elective care appointments due to their concerns about infection and safety.

Now there is a significant portion of physicians who are concerned about returning to regular medical practice, while others in some countries are more comfortable with returning to normalcy

Q1
How concerned are you about your return to your regular medical practice as the COVID-19 lockdown eases in your area? N=389

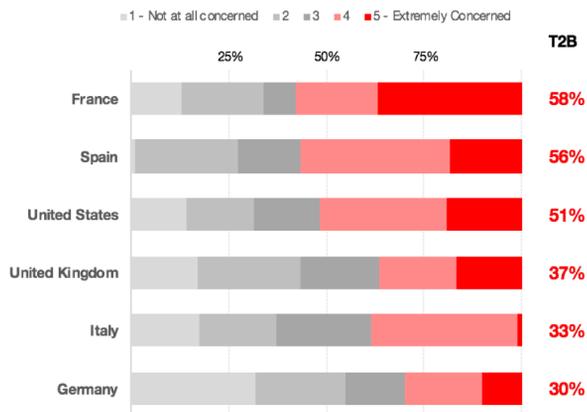
More physicians are concerned

Covid-19's negative impact is going to endure on our health systems even as lockdowns ease.



Nearly half of physicians are still T2B concerned about returning to regular practice.

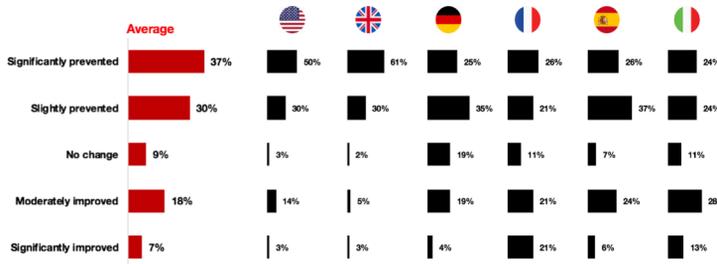
Trust in the system has been eroded, and there is work to do to restore it.



A significant number of physicians are concerned about returning to regular practice in all the countries surveyed. However, levels of extreme v. moderate concern vary widely country by country.

We are entering a moment of change

COVID-19 was a change agent globally. It prevented effective medical practice for most physicians, but at the same time it also drove “moderate” and “significant” improvements in the ways in which many physicians practice.



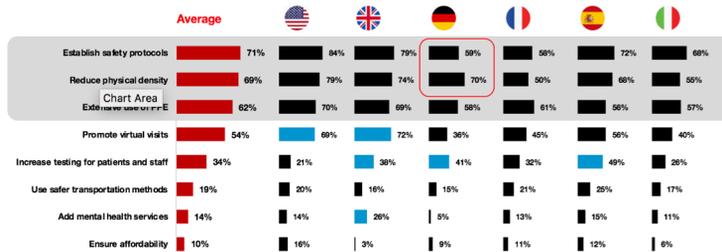
Q2
To what degree has COVID-19 impacted working healthcare professionals’ ability to practice medicine as effectively as they want? N=389

The U.S. and U.K., among the hardest hit countries, see far more negative impacts on how they practice. Other countries observed both negative and positive impacts. This points to a loss of confidence, serious in places, that will need to be addressed.

To move forward, we see an opportunity to more deeply explore those pockets where improved practices are being noted, such as in France, Spain, and Italy.

Are improved protocols now helping more patients survive? Or is this a function of physicians being able to regain control over the pandemic in a respective geography, as infection rates slow? More exploration here could offer tremendous benefits.

Most agree that greater emphasis on safety protocols, reduced physical density and more extensive use of PPE will be essential



Q3
When thinking about your in-person appointments in the coming weeks and months, what is your practice, office, clinic, or hospital doing to help patients feel safe and confident about coming back? N=389

We see an imperative to invest in what’s needed to move forward.

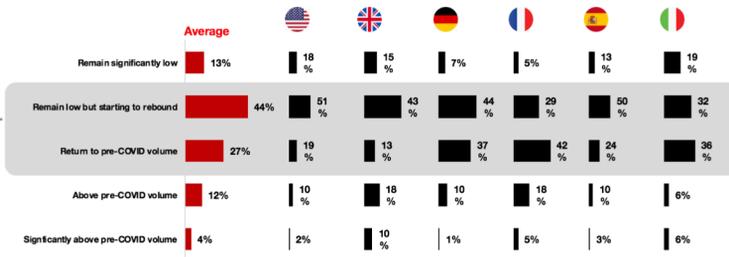
The basics have become essential. Medical offices always prioritize safety, and now reducing physical density and adding even more PPE is essential.

Emerging new innovations are also identified – virtual visits, testing, and added mental health appear to have gained traction in geographic pockets.

While physicians are not as confident as they’d like to be about returning to practice, the slowdown of patient visits could be an opening to increase willingness among more doctors to embrace emerging healthcare innovations.

Fortunately, there is optimism ahead

Most physicians are optimistic that patient volumes will start to increase again in the next few months – and a portion of physicians in Germany, France and Italy expect to return to normal in the coming weeks or months.



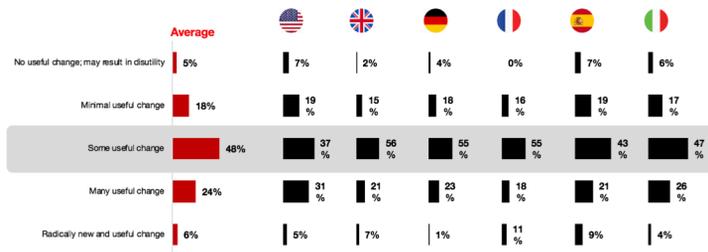
Q4

How do you expect patient demand will change the coming weeks and months?
N=389

Most doctors surveyed are optimistic that patient volumes will rebound, with measures that were identified in our prior question.

However, many say this will be on a slower trajectory and will remain under pre-COVID volumes. Again, this points to a loss of confidence among some that must be addressed.

Most physicians are confident that the experience of COVID-19 will enable at least some or many useful systemic changes to healthcare



Q5

To what extent will learnings and takeaways from our collective Covid-19 experience enable useful changes to your nation's healthcare system in the longer term?
N=389

There is more exploration to do here, which could point to new innovations, learnings and opportunities to drive larger changes to national healthcare systems. Is there now a greater emphasis on population health? On major improvements to supply chains and logistics?

While a majority express at least some optimism, very few expect 'radical' change as a result of COVID-19. At this point, learnings at the system level may not yet be clear enough to point to bigger action.

Key takeaways

01.

Focus on the essentials to rebuild trust

The basics that were perhaps overlooked in the past such as PPE, testing and patient spacing in clinics cannot be an afterthought. Trust among physicians has been compromised to an extent globally, and it will be the work of health systems and healthcare brands to work harder to rebuild confidence among doctors across specialty areas.

02.

Healthcare requires new ways of working

Some physicians, but perhaps not yet enough, are beginning to note new and different approaches to care that represent improved ways of working post COVID-19. Many of these focus on providing better access and quality of care, such as encouraging more virtual visits, adding mental health support for staff and patients, and providing safer transportation to and from visits.

Moving into a post-COVID world, all healthcare brands will be looking to apply learnings from the crisis to transform and improve how they conduct business. One of the biggest lessons, but perhaps toughest to solve because it is complex, is transforming the feeling of preparedness that ultimately comes from much more than supplies or equipment alone.

In today's interconnected healthcare ecosystem, any product, service or offering has the potential to become mission-critical.

The imperative for all healthcare brands is to be prepared for that moment by clarifying their role and offering to every stakeholder. We hope these findings can lead to new thinking and responses that help us all get to a new place that is better equipped not only to handle a future crisis but also the healthcare needs of today.