Patient Experience Report

Contents

The Patient Experience in 2020

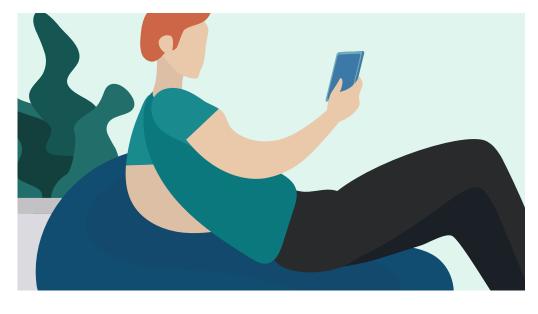The COVID-19 pandemic fueled the rapid adoption of telehealth in 2020 as the need for a remote option for healthcare grew. Today, patients are continuing this trend, frequently starting their healthcare journeys online recognizing that they can receive high-quality, affordable care to address their everyday healthcare needs virtually as a complement to in-person care.

Virtual care is now seen as essential by many patients and those in the industry, and the new industry standard for patient-centric care includes both virtual and in-person options. In fact, some leading health systems anticipate that by 2025, 50% of outpatient care will be done online. It's also estimated that $250 billion of current U.S. healthcare spend, including primary care, could be virtualized.

One of those virtual options is direct-to-patient healthcare. Direct-to-patient healthcare offers care without the prerequisite of insurance. This model has become especially important for the millions of patients across the country who may not have existing or adequate health insurance.

As direct-to-patient virtual care becomes a crucial delivery platform for essential healthcare, it will be important to better understand and continue to improve the patient experience to optimize its potential benefits long term.

1 What types of patients are seeking direct-to-patient virtual care?

2 Why do patients value direct-to-patient virtual care?

3 Why will patients continue using direct-to-patient virtual care?

Introducing Ro's 2020 Patient Experience Report

Ro's 2020 Patient Experience Report takes a deep dive into these questions and looks at patients' experiences receiving virtual care on Ro's vertically-integrated primary care platform.

Ro is a healthcare technology company whose vertically-integrated primary care platform powers a personalized, end-to-end healthcare experience from diagnosis, to delivery of medication, to ongoing care. Ro is the only healthcare company in the country to seamlessly integrate a nationwide telemedicine practice, a nationwide pharmacy network, and an in-home care platform that can send a healthcare provider to the home of 95% of the U.S. population. Since 2017, Ro has facilitated digital healthcare visits in nearly every county in the United States, including 98% of primary care deserts.

To better understand the patient experience on Ro's platform and how to optimize a virtual and in-person healthcare model, we surveyed 447 patients who received prescription treatment for a health condition for two or more months from January to September 2020.

Here are a few headlines from our findings:

A majority of patients turning to Ro for direct-to-patient virtual care were seeking care for their condition for the first time.

A majority of patients felt their needs were met and that Ro-affiliated providers were able to deliver personalized, end-to-end care.

A majority of patients reported receiving high-quality care through Ro and indicated they would use telehealth as a complement to their in-person care.

Who sought virtual care through Ro in 2020?

Many patients turning to Ro for direct-to-patient virtual care were seeking care for their condition for the first time. Frequently, virtual care offered a way to overcome current obstacles that arise with the traditional, in-person healthcare experience and a way to navigate the evolving, pandemic landscape.
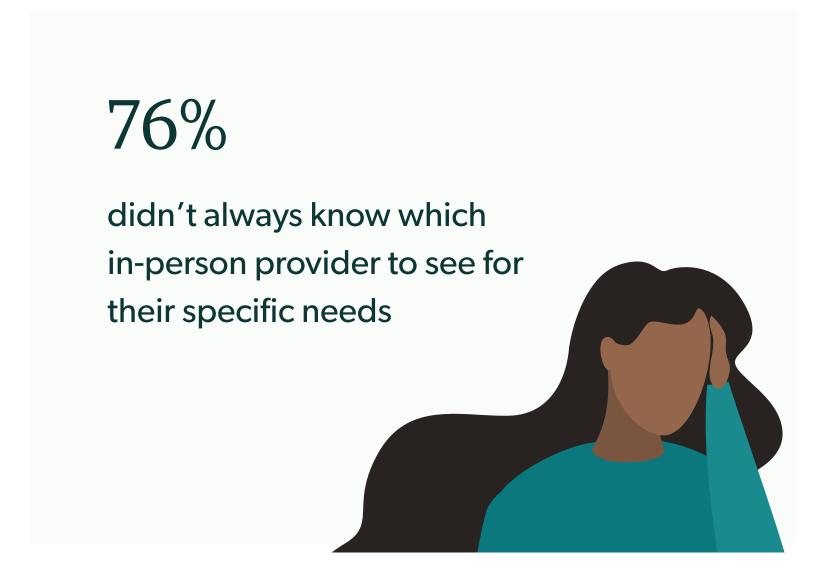
New to **Virtual Care**

Nearly all patients seeking care through Ro were new to virtual care.

93%

had never received care via virtual care/telehealth solutions like Ro

76%

didn't always know which in-person provider to see for their specific needs

New to **Treatment**

Patients turned to Ro's direct-to-patient virtual care as an approachable and affordable entry into the healthcare system, with many seeking treatment for a condition for which they had not previously sought care.

34% did not have a primary care provider

68% had never sought care for their condition—whether in-person or virtually—prior to seeking treatment through Ro

For those taking prescription medications, **47%** indicated those medications were not covered by insurance

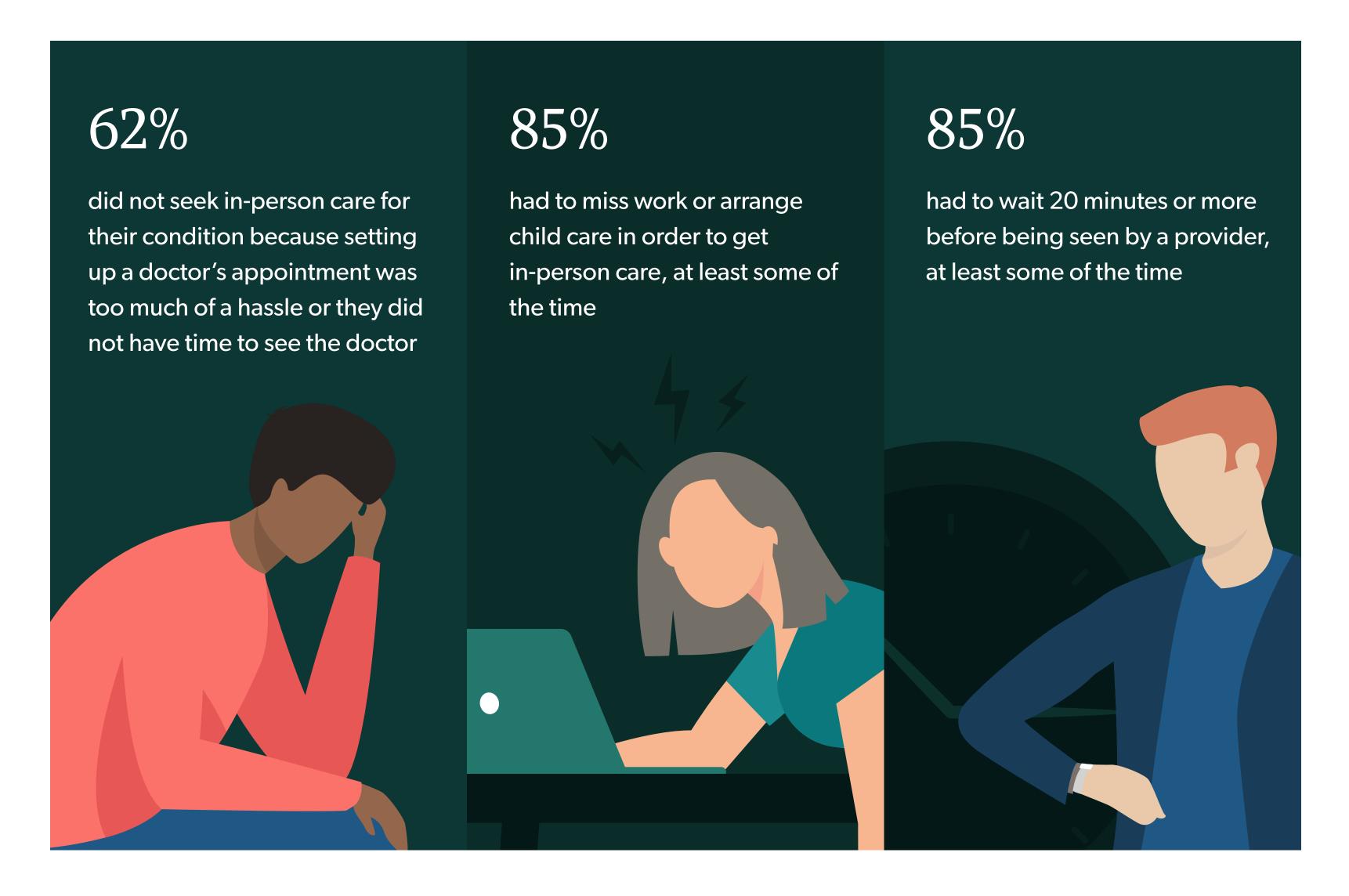**30%** wouldn't have sought care at all if not for Ro

5% said they would have turned to acute care settings like the emergency department or urgent care

"I felt more comfortable that I did not have to have office personnel or pharmacy people in my town know about my issues. I felt like my privacy was better protected."

Ro patient

Unsatisfied with In-Person Healthcare Experience

More than a third of patients were unsatisfied with their current in-person healthcare experience prior to seeking care through Ro.

62%

did not seek in-person care for their condition because setting up a doctor's appointment was too much of a hassle or they did not have time to see the doctor

85%

had to miss work or arrange child care in order to get in-person care, at least some of the time

85%

had to wait 20 minutes or more before being seen by a provider, at least some of the time

Facing Interruptions to Care due to **COVID-19**

Patients who were delaying or skipping treatment turned to Ro to help continue care online outside of in-person settings that could pose an increased risk due to the pandemic.
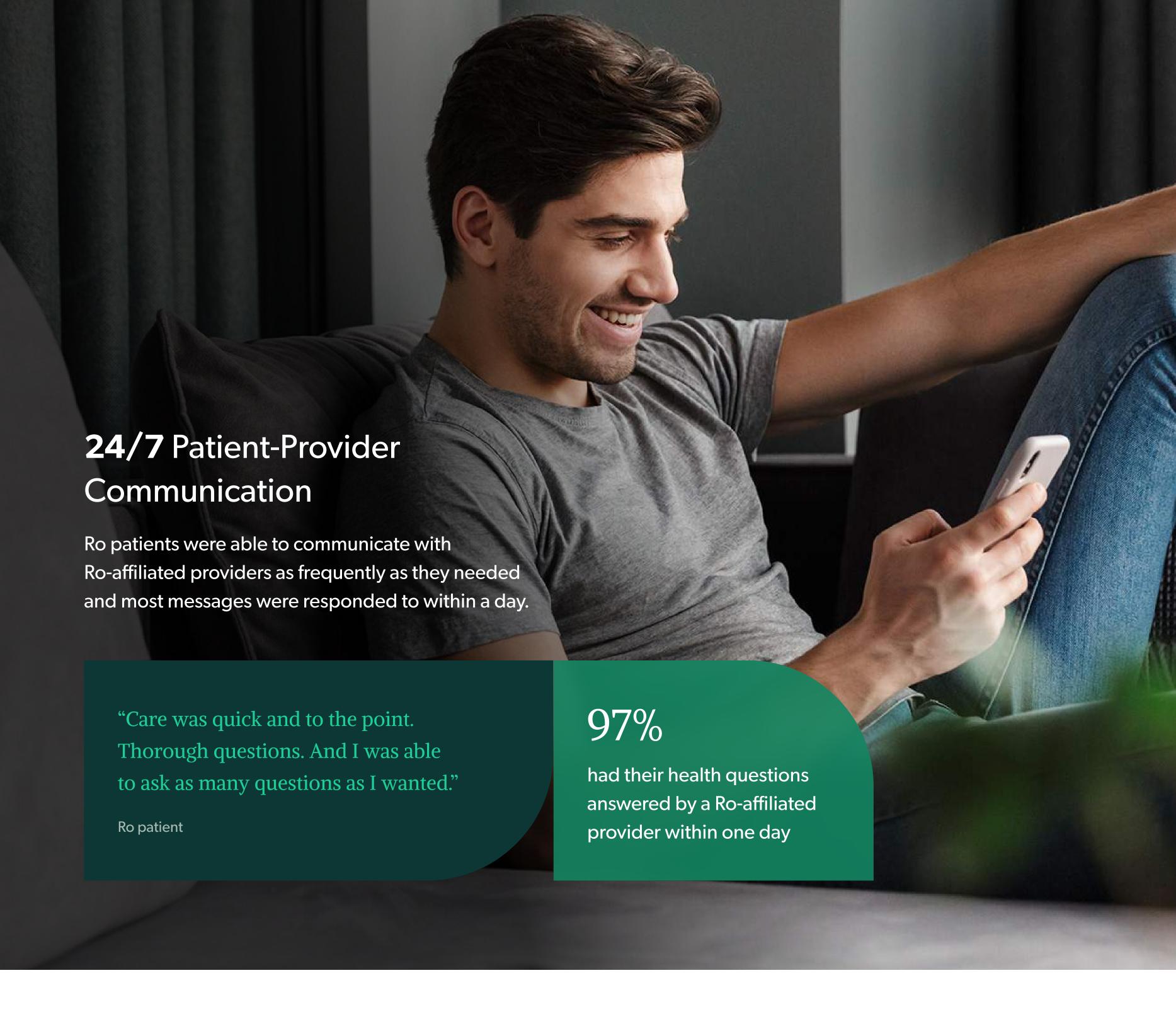
22%

had skipped in-person care due to safety concerns surrounding COVID-19

"The perks [of telehealth] are that I don't have to be in-person, [it] eliminates risk of exposure, and [I] feel comfortable maintaining my health from home."

Ro patient

Why did patients value their healthcare experience with Ro?

Patients felt their needs were met and that Ro-affiliated providers were able to deliver personalized, end-to-end care.

24/7 Patient-Provider Communication

Ro patients were able to communicate with Ro-affiliated providers as frequently as they needed and most messages were responded to within a day.

"Care was quick and to the point. Thorough questions. And I was able to ask as many questions as I wanted."

Ro patient

97%
had their health questions answered by a Ro-affiliated provider within one day

No Insurance Required

Since Ro doesn't accept insurance and operates on an affordable cash-pay model, providers practicing on Ro's platform are not burdened by the administrative tasks associated with insurance billing and coding.

Providers are empowered to focus on what matters most: each patient's needs. For patients, they know the cost of their treatment upfront and can securely message their provider at any time to discuss their treatment plan at no additional cost.

41%
of patients were not confident about the costs they would face when seeking in-person care

92%
indicated they had a clear understanding of how much their care was going to cost via Ro

Personalized, End-to-End Care

Ro patients felt that their Ro-affiliated provider understood their needs and delivered personalized care throughout their healthcare journey with Ro.

97%

said they could be honest with their Ro-affiliated provider

91%

said their Ro-affiliated provider understood their needs

91%

said their Ro-affiliated provider explained their condition and treatment in a way they could understand

"I feel I got better attention and more details and way more accessibility to my doctor."

Ro patient

"I felt like I was the provider's sole focus and [he] really listened to all of my concerns. I was not competing with other things for his attention."

Ro patient

Why will patients continue their care with Ro?

Patients reported receiving high-quality care through Ro and indicated they would use telehealth as a complement to their in-person care. They also shared they would recommend Ro to friends and family.
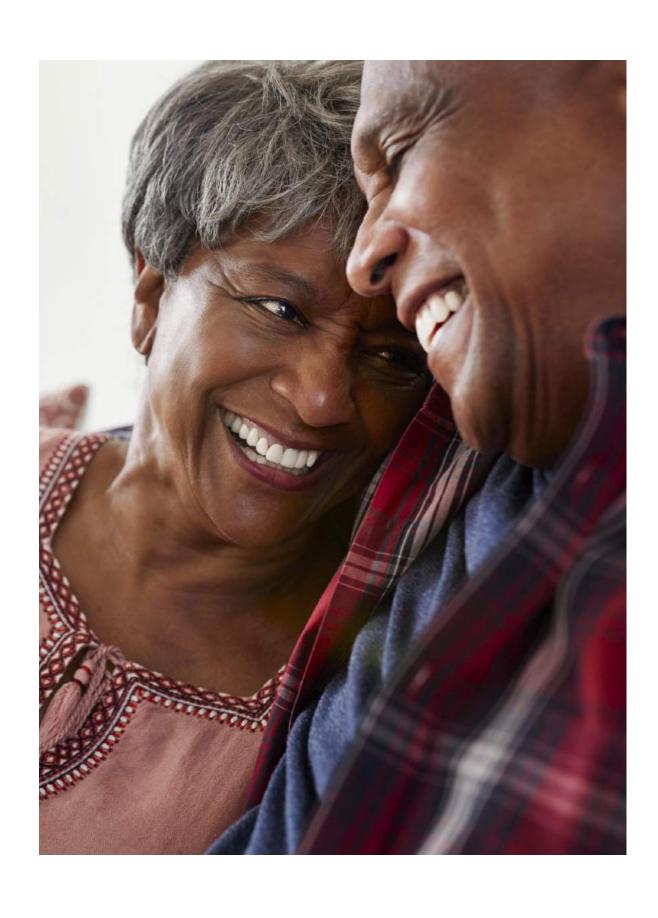
Achieved
Health Goals

Ro patients had their health goals met and were satisfied with the care they received.

95% of patients were satisfied with the care they received through Ro

92% of patients indicated the care they received through Ro met all of their needs

Received
High-Quality Care

Ro patients felt their care was comparable to the care they received in-person and would recommend it to friends and family.

89% would recommend Ro to friends and family

72% would use Ro over in-person care for some of their other health needs if those services became available

Complement to
In-Person Care

Ro patients use Ro as a complement to their in-person care and indicated that using virtual care did not disconnect them from their in-person primary care.

90% of those with a primary care provider have gone back to see them since getting treatment through Ro

How Ro is building a more patient-centric healthcare experience for the future

Ro's 2020 Patient Experience Report illustrates the reality we already know. Healthcare will always have challenges to solve, and those challenges often fall to the patient to address.

At Ro, we are actively working to solve those challenges for our patients by listening to our patients and building our platform to take the complexity out of healthcare to put them back in control. Our patient testimonials and findings affirm that direct-to-patient virtual care, like that offered on Ro's vertically-integrated primary care platform, can help patients navigate and overcome many of these challenges—from high healthcare costs to access barriers. Ro also believes that by continuing to improve the patient experience, we can improve the provider experience and help address issues like provider burnout.

However, our results and feedback from our patients tell us there is more to be done to shape a patient-centric healthcare system. The pandemic has been a catalyst for the innovation and adoption of virtual care; but it has also put its limitations on display.

Ro predicts that in the next decade, more healthcare services—such as diagnostics and vaccinations—will be delivered online or in-home than in every hospital, doctor's office, or pharmacy combined.
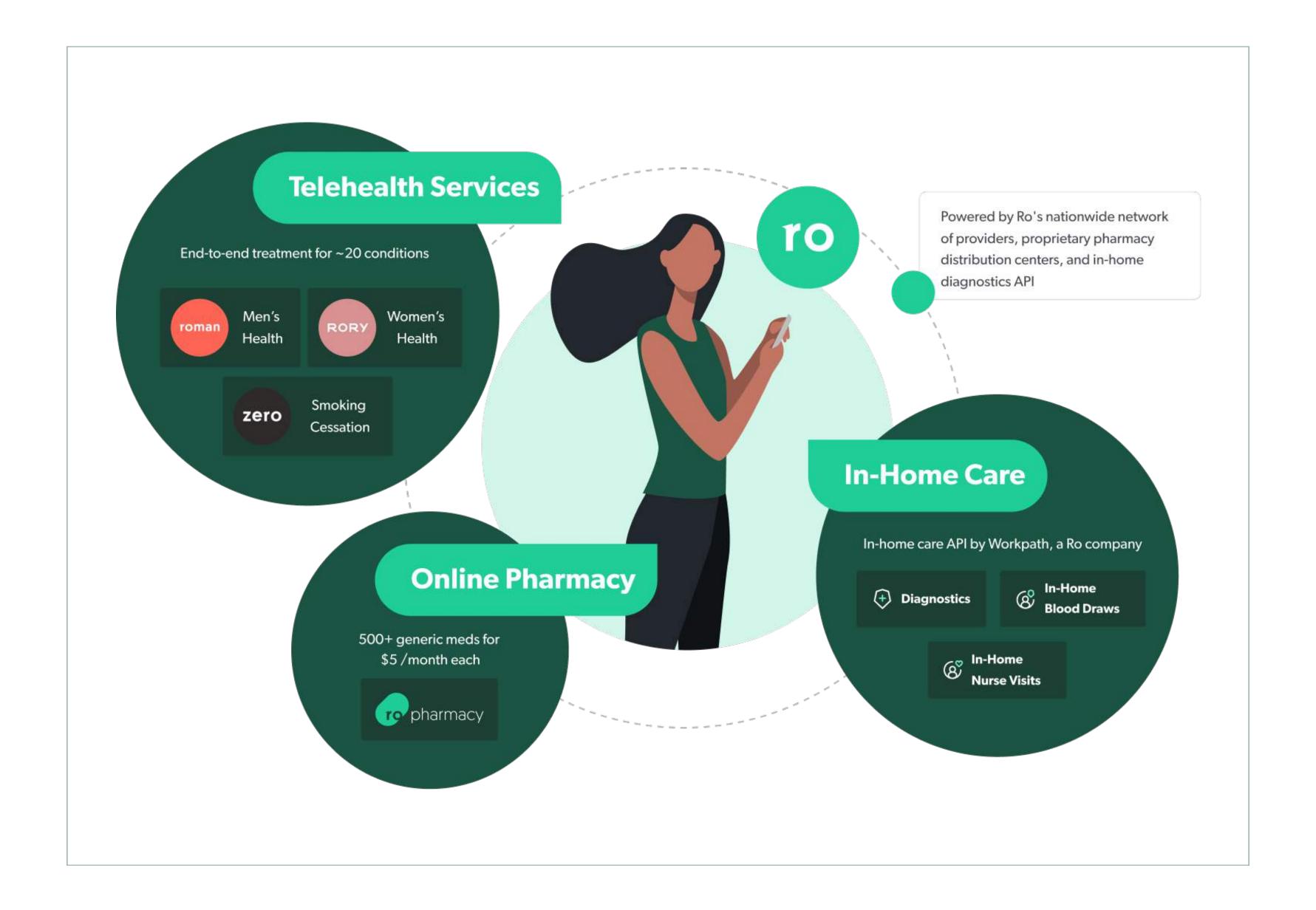
Ro is creating a patient-centric healthcare system that seamlessly connects virtual and in-person care.

Virtual care has proven to be an essential complement to in-person care. However, you cannot draw blood or administer a vaccine via telemedicine. While many services are suitable for virtual care, many are also too complex. 70% of healthcare decisions require lab results.

In December 2020, Ro added in-home care and lab testing capabilities to its platform. Our platform's evolving ability to send healthcare professionals to a patient's home for more complex needs, as well as primary care needs, expands our ability to help patients address more of their healthcare needs directly on Ro's platform.

Today, Ro is the only vertically-integrated primary care platform that connects telehealth, in-home care, and online pharmacy services. This enables us to track a patient's journey and facilitate frictionless care coordination from diagnosis, to the delivery of medication, to ongoing care.
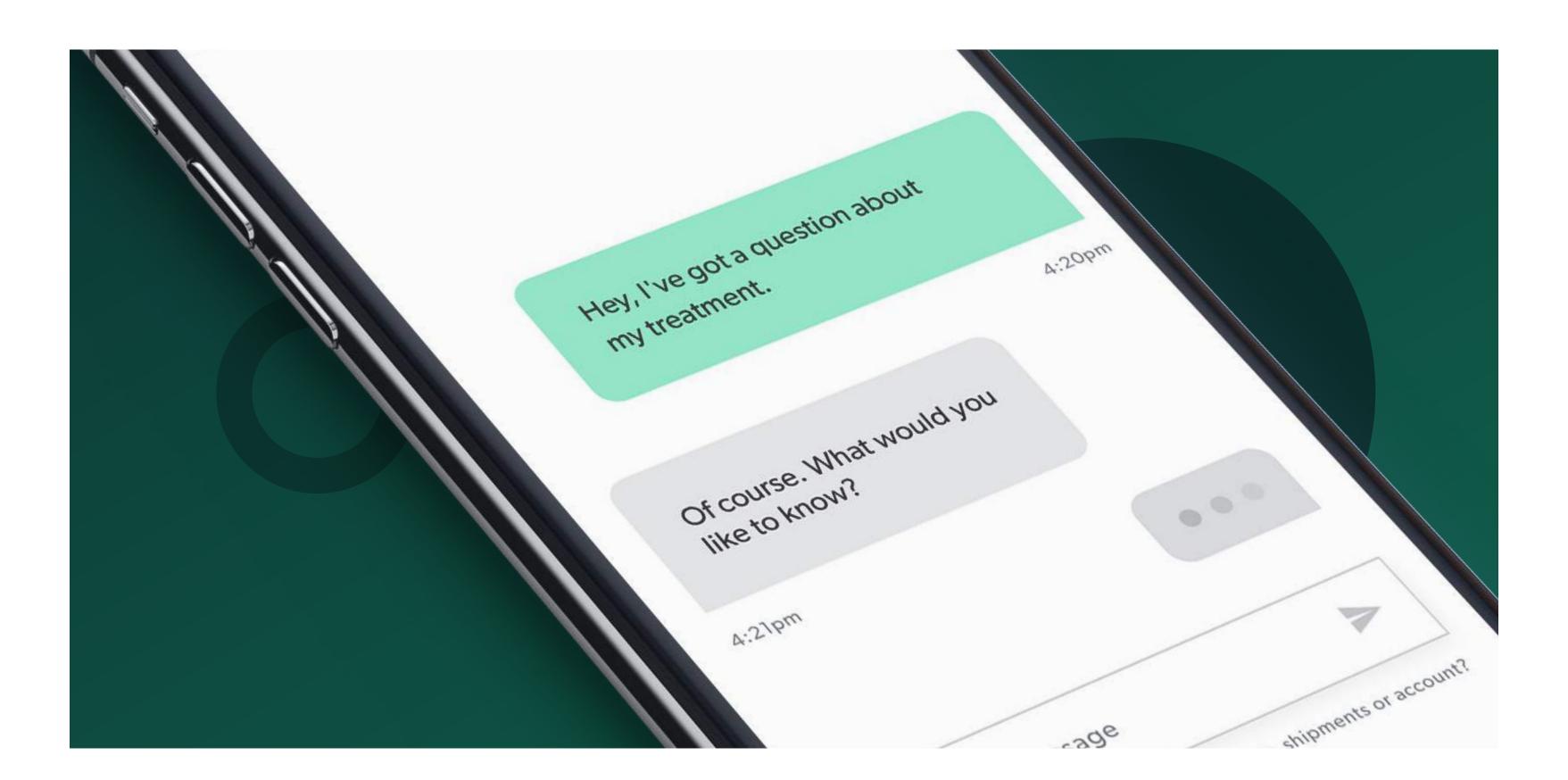
Ro is strengthening patient and provider relationships to provide more holistic care.
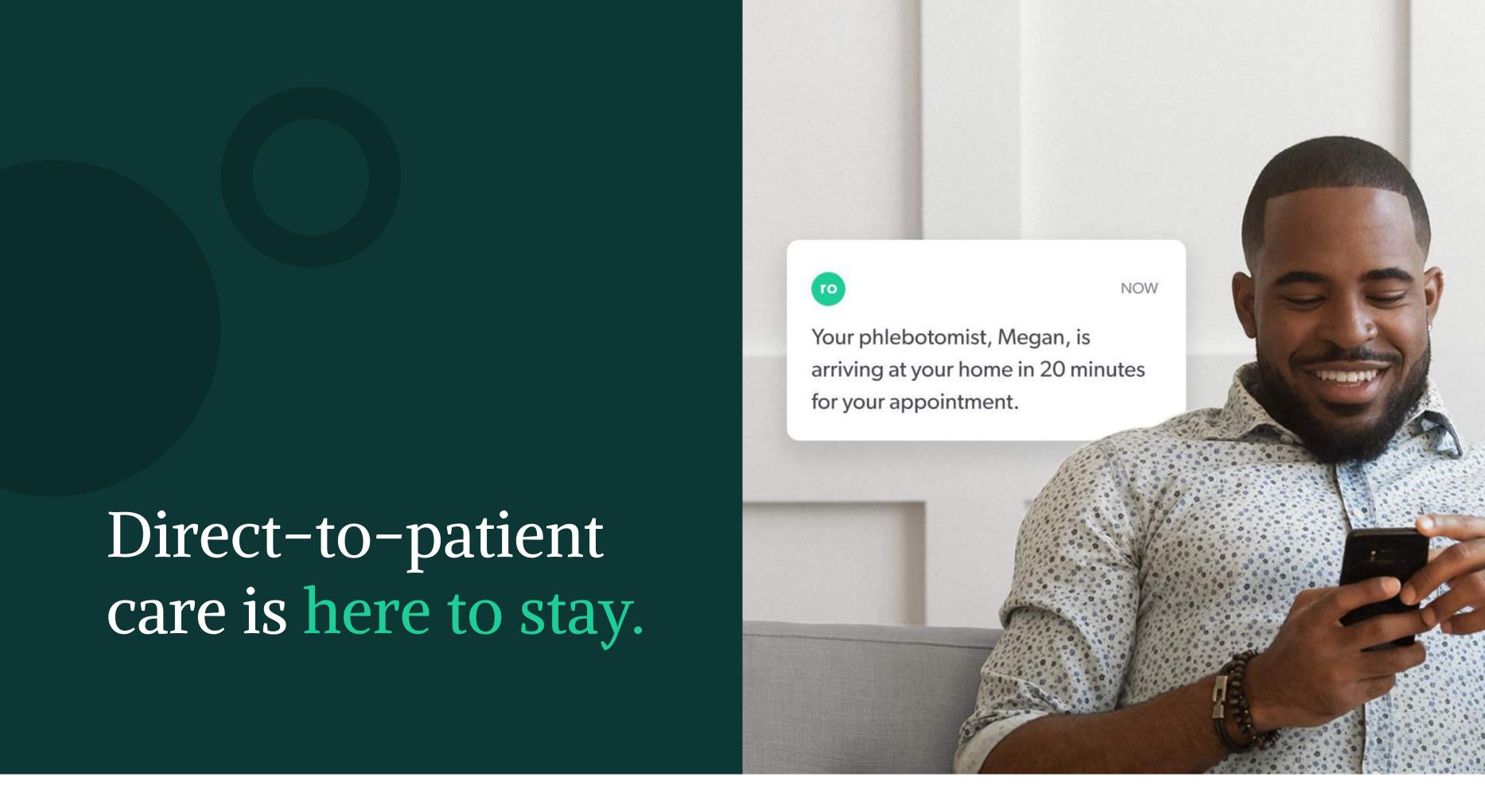
By continuing to make care more accessible and more affordable for our patients, we can encourage ongoing patient-provider engagement, which can help patients work more closely with their Ro-affiliated providers to achieve better health outcomes for their health needs.

Our findings demonstrate that direct-to-patient virtual care on Ro's platform enables providers to deliver high-quality care while helping patients manage their health more easily and effectively because:

Ro's platform facilitates seamless patient-provider communication that is available any time at no additional cost, reducing unnecessary trips to the doctor's office and costs and copays for patients.

Providers practicing on Ro's platform are not overburdened by insurance-related tasks and are therefore consistently able to quickly respond to patients when they need them.

Technology helps Ro make healthcare more affordable and efficient. It reduces unnecessary costs and administrative tasks, while enabling providers to deliver more personalized, continuous care.

Direct-to-patient care is here to stay.

Before the pandemic, the value of virtual care was still largely unrealized—less than 10% of people had ever tried telemedicine. However, the pandemic has showed patients that if they can communicate with their friends and family remotely and safely, they should be able to do the same with their doctor. Now, asking a patient to drive an hour for a 13-minute doctor's appointment or 45-minute wait at the pharmacy simply does not make sense.

While everyone in the healthcare industry would have hoped for a different reason, COVID-19 has proven that direct-to-patient virtual healthcare is here to stay. More and more people are coming to understand that certain aspects of healthcare can be delivered remotely using technology—and that this remote care can be high-quality, safe, and affordable. Direct-to-patient virtual care can provide healthcare where it is needed most, especially in rural communities and primary care deserts and can remove access barriers of time, distance, cost, and stigma associated with certain medical conditions.

We see the direct-to-patient trend continuing in the future and expanding into other areas of care like in-home care and diagnostics. Today, Ro has the ability to send healthcare professionals to a patient's home, seamlessly connecting virtual and in-person care all on Ro's platform. The goal in the future is to continue to expand these capabilities and integrate additional healthcare providers, such as therapists, nutritionists, lifestyle coaches, social workers, and others to provide comprehensive, holistic care for any patient need.

Ro will continue to build technology that puts patients in control of their healthcare and enables providers to do what they do best—**help patients**.

Appendix

Survey Methodology

Ro's Patient Experience Survey was fielded from October to December 2020 and includes a random sample of our patients across the U.S. We wanted to hear from a diverse group, so we oversampled women, rural patients, and patients that lived in a zip code that was predominantly nonwhite to ensure demographic representation. We know that the people that are willing to respond to surveys tend to be those with extreme opinions. To reduce the possibility of biasing our results in this way, we kept our sample limited and offered gift cards in exchange for filling out the survey to entice a wide group of patients to provide us with data. Our response rate was about 20%.

In order to hold ourselves to the highest ethical research standards, this survey project was reviewed and approved by the Biomedical Research Alliance of New York's Institutional Review Board.

Sampling

We applied a stratified random sampling approach, in which each patient in the sampling frame was assigned to one of 7 sampling blocks representing populations of interest with different probabilities of selection based on their prevalence in the sampling frame (gender, urban/rural, predominantly nonwhite zip codes, condition). A patient could only belong to one block, and within-block random samples were extracted.

Fielding and Response Rate

The survey was fielded between October and December of 2020. Patients who were selected via random sampling were emailed a copy of the survey and asked to complete it in exchange for a $20 gift card.

Analysis

Survey results were weighted based on population prevalences from within the sampling frame. All descriptive analyses for this report were conducted in R version 3.02 and using the "survey" package to incorporate design weights.

- Results are weighted to account for sampling procedures

- Respondents were given a $20 Amazon gift card for participating

- We emailed a total of 2379 patients and 447 patients completed (response rate = 19%)

Limitations

We believe that it is important to acknowledge that our study has some limitations. All surveys are subject to sampling and response bias and measurement error. While ~20% is an acceptable response rate for patient surveys, response bias remains a threat to validity. Where possible, we used validated measures but in some cases where there were none, we wrote our own questions. We employed best survey practices, so limitations notwithstanding, we believe that the findings were produced with rigor and make a valuable contribution to our understanding of direct-to-patient telehealth patients.