How is the Coronavirus Impacting Healthcare Perceptions and Behaviors?

(Wave I Results – April 2020)

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Introduction

- This year's Omnibus is a bit different from past years. We focus the entire survey on consumer reactions to the Coronavirus and we will conduct three waves of this survey to track how these reactions change as we get past the 'peak' and move into our 'new' normal.
- This presentation summarizes findings from the first wave conducted in early April. Wave II will field in late April/early May after the peak and the third wave will field sometime in late May/early June as we emerge in our new normal. Field times are fluid as we monitor the progress of this pandemic.
- Also, this year, we are pleased that our long-time research partner and friends – The DRG – have partnered on this research with us.
- Klein & Partners and The DRG would like to thank you for your extraordinary efforts during these unprecedented times in recent history to help our local communities keep safe and informed about the latest developments and the support available on the Coronavirus. God Bless and stay safe.

--Rob Klein, Founder & CEO, Klein & Partners

Methodology

Online survey

n=500 → +/-3.7% at the 90% CL

Fielded: April 2-4, 2020

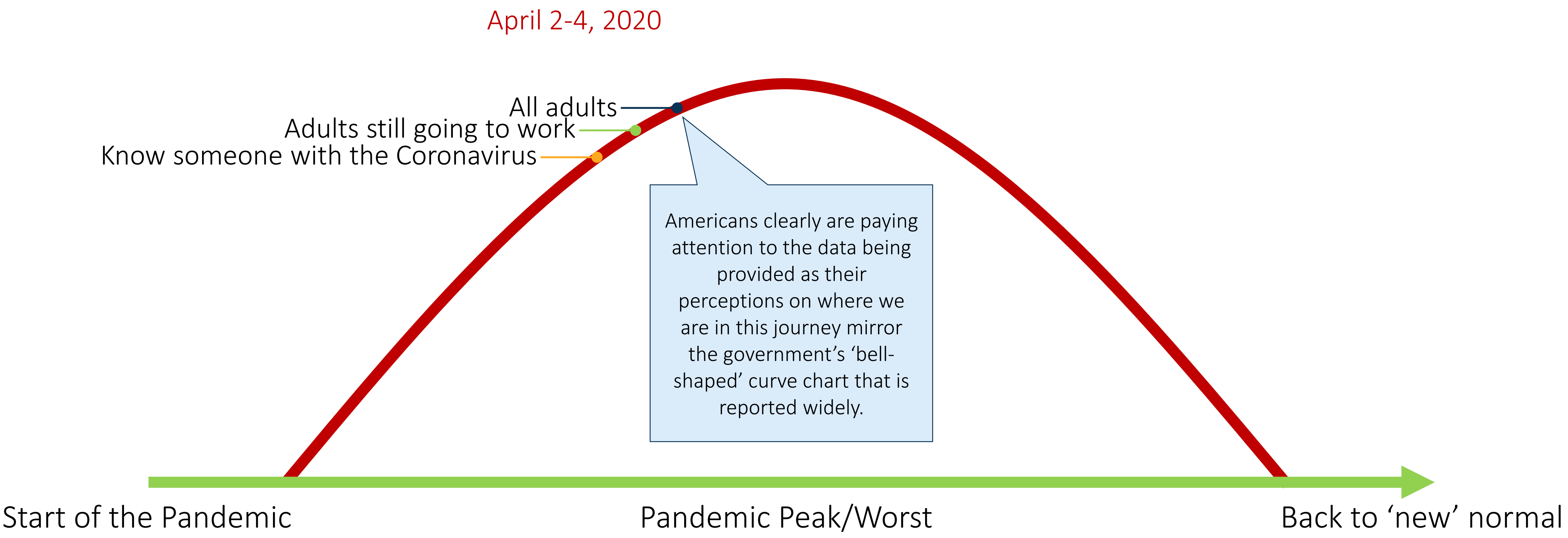
National random sample of adults

Note: Arrows (↑↓) and **bolded scores** indicate a statistically significant difference between those two data points

What did we learn?

Where are we on this journey?

Where are we?


April 2-4, 2020
All adults
Adults still going to work
Know someone with the Coronavirus
Americans clearly are paying attention to the data being provided as their perceptions on where we are in this journey mirror the government's 'bell-shaped' curve chart that is reported widely.
Start of the Pandemic
Pandemic Peak/Worst
Back to 'new' normal

Coronavirus Exposure

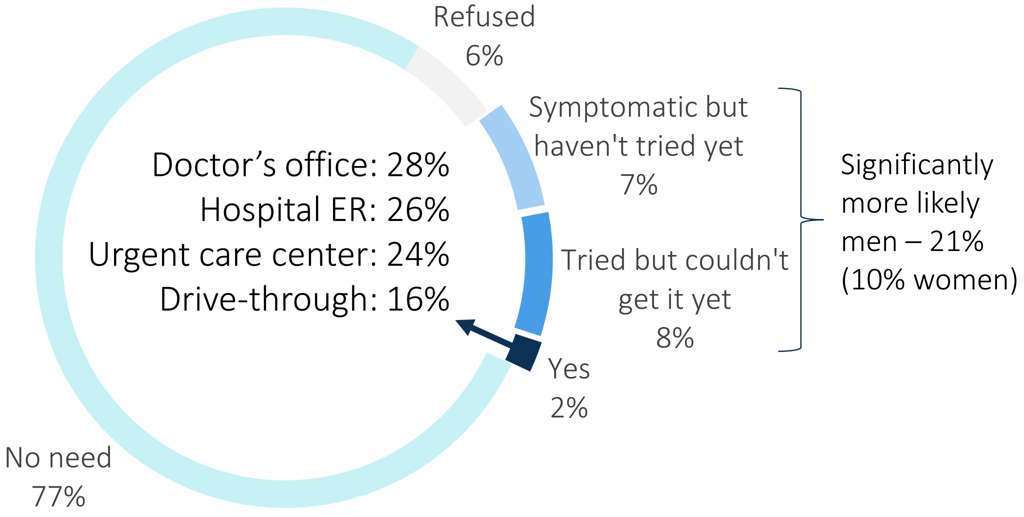
Coronavirus exposure

Exposure to the Coronavirus

I don’t know anyone with it	78%
A friend has it	14
A family member has it	2
A household member has it	1
I have the Coronavirus	1

Significantly higher in urban areas - 30%

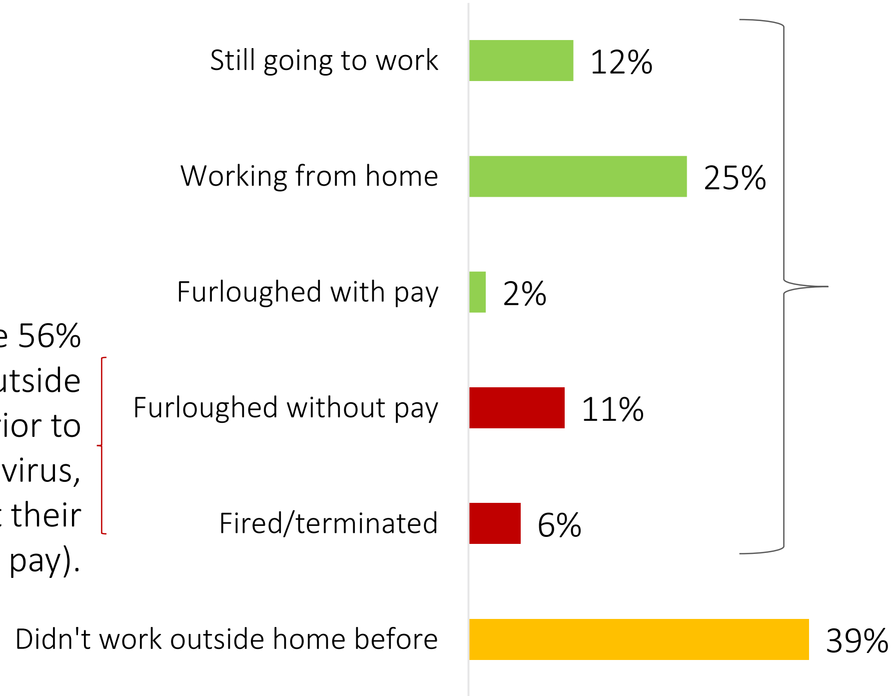
Tested for Coronavirus?



Work Impact

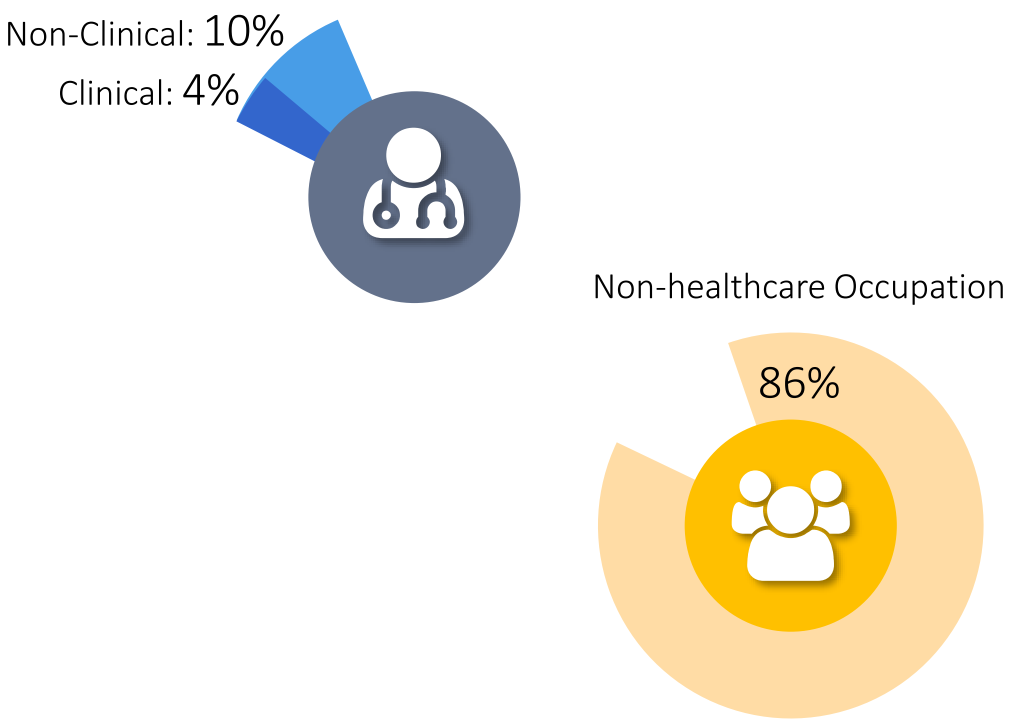
The Coronavirus impact on work

Work Status



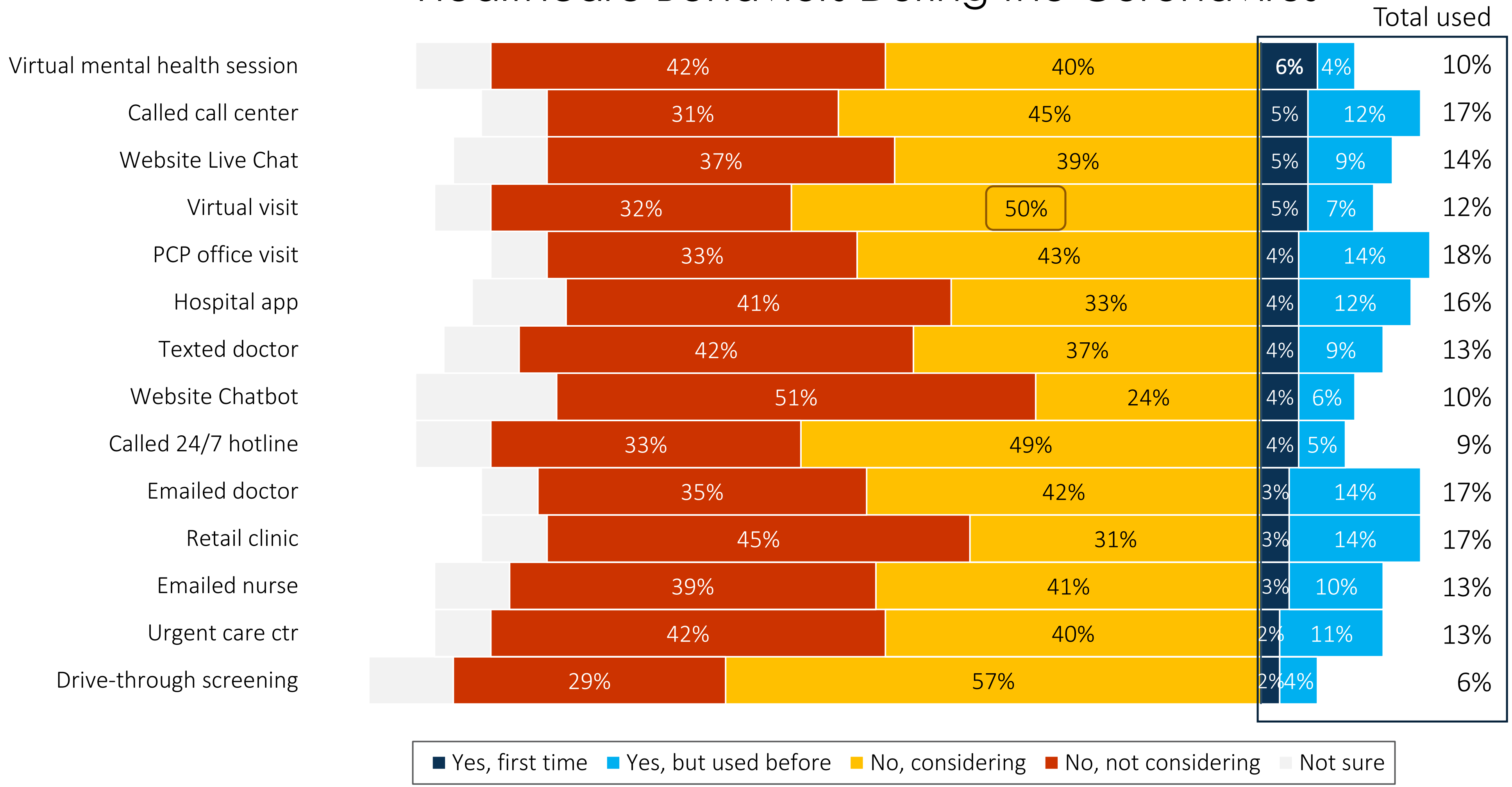
Of the 56% employed outside the home prior to the Coronavirus, 30% have lost their jobs (i.e., pay).

Work in Healthcare?



Healthcare Behaviors During the Coronavirus

Healthcare Behaviors During the Coronavirus



The top-5 most common healthcare behaviors during the pandemic are:
1) going to the PCP
2) calling a call center
3) emailing a doctor
4) visiting a retail clinic
5) downloading a hospital/system app

However, most of these healthcare behaviors are not new behaviors except for virtual mental health sessions; which tops the list of new behaviors.

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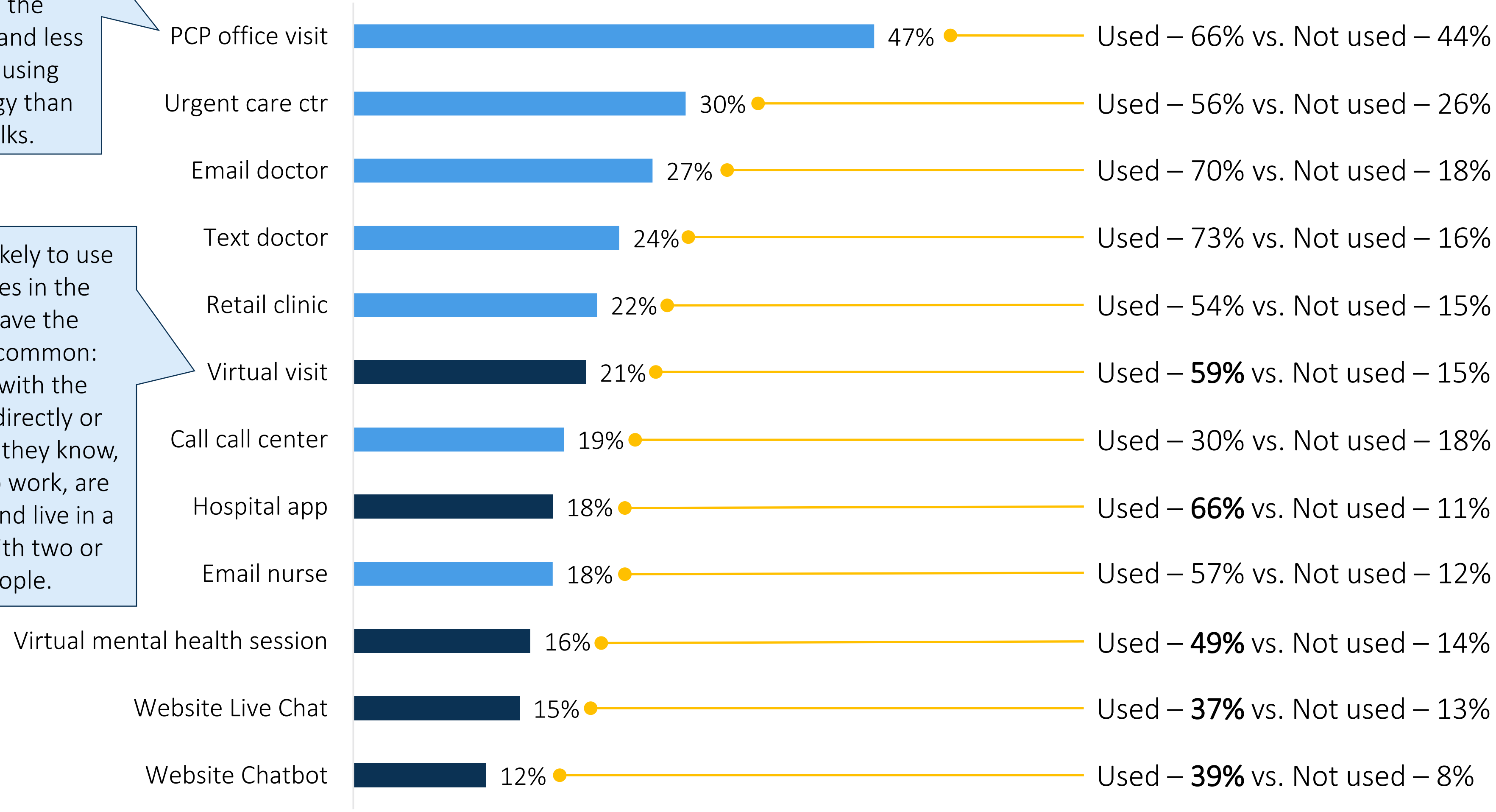
Not too surprisingly, seniors are more likely to return to the doctor's office and less interested in using new technology than younger folks.

People most likely to use these services in the future all have the following in common: experience with the Coronavirus directly or with someone they know, had to go into work, are non-seniors, and live in a household with two or more people.

Healthcare Behaviors 'Definitely' Will Do After The Coronavirus

Use Potential Based on Use During Pandemic



For the newer 'behaviors,' once they try them, they are very likely to continue using them after the Coronavirus.

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Cancelled appointments and what patients did about it

What patients did about cancelled appointment	Dental Care (30%)	Follow-up Visit (21%)	Eye Care (15%)	Annual Physical (13%)	Consult Visit (10%)	Screening Test (10%)	Physical Therapy (9%)	Therapy Session (8%)	Sick Care Visit (6%)	Elective Procedure (3%)	Elective Surgery (2%)
Rescheduled	33%	33%	31%	28%	20%	35%	27%	32%	23%	28%	44%
Waiting to reschedule	43	27	44	35	30	43	34	19	26	31	40
Couldn't reschedule	12	16	21	14	8	16	15	5	19	8	16
Don't plan to reschedule	7	6	3	16	8	0	12	0	5	33	0
Changed to virtual visit	5	12	0	7	23	4	12	42	8	0	0
Not sure	0	6	0	0	10	2	0	2	19	0	0

In total, 59% cancelled some procedure or appointment.

Two areas where we could see continued growth in virtual visits

What is our strategy to get them back?

From a recent CNBC article: "March telehealth visits surged 50%, according to research from Frost and Sullivan consultants. Telemedicine providers such as Teladoc reported a spike in video requests to more than 15,000 per day."

When will activities return to normal?

Seniors are more likely to get back to hugging, eating out and going to social gatherings quicker than younger folks.

*Never did this activity	Activity	Immediately	After some time	Not sure ever go back	Not sure
	Social Activities				
8%	• Shaking hands	21%	42%	25%	11%
10%	• Hugging	32%	38%	20%	10%
12%	• Social gatherings	25%	55%	12%	8%
15%	• Having guests over to house	31%	50%	10%	9%
	Events				
35%	• Concerts/Sports	23%	48%	21%	8%
55%	• Conference/Seminar	15%	51%	18%	16%
	Travel				
38%	• Flying domestically	15%	55%	17%	13%
53%	• Flying internationally	9%	54%	23%	13%
58%	• Taking a cruise	10%	37%	35%	18%
23%	• Staying in a hotel	15%	60%	15%	10%
	Activities				
8%	• Eating at a restaurant	37%	50%	7%	6%
8%	• Shopping at a store/mall	40%	46%	8%	7%
52%	• Going to the gym	33%	40%	16%	10%
40%	• Going to place of worship	36%	41%	9%	15%
34%	• Going back to work	64%	19%	7%	10%
12%	• Saving money	61%	19%	7%	13%

*Did this Activity in the Past (Immediately; After some time; Not sure ever go back; Not sure)

*Re-percentaged out the never did percent so these percentages add to 100%

Perceptions of How Local Healthcare Providers are Handling the Coronavirus

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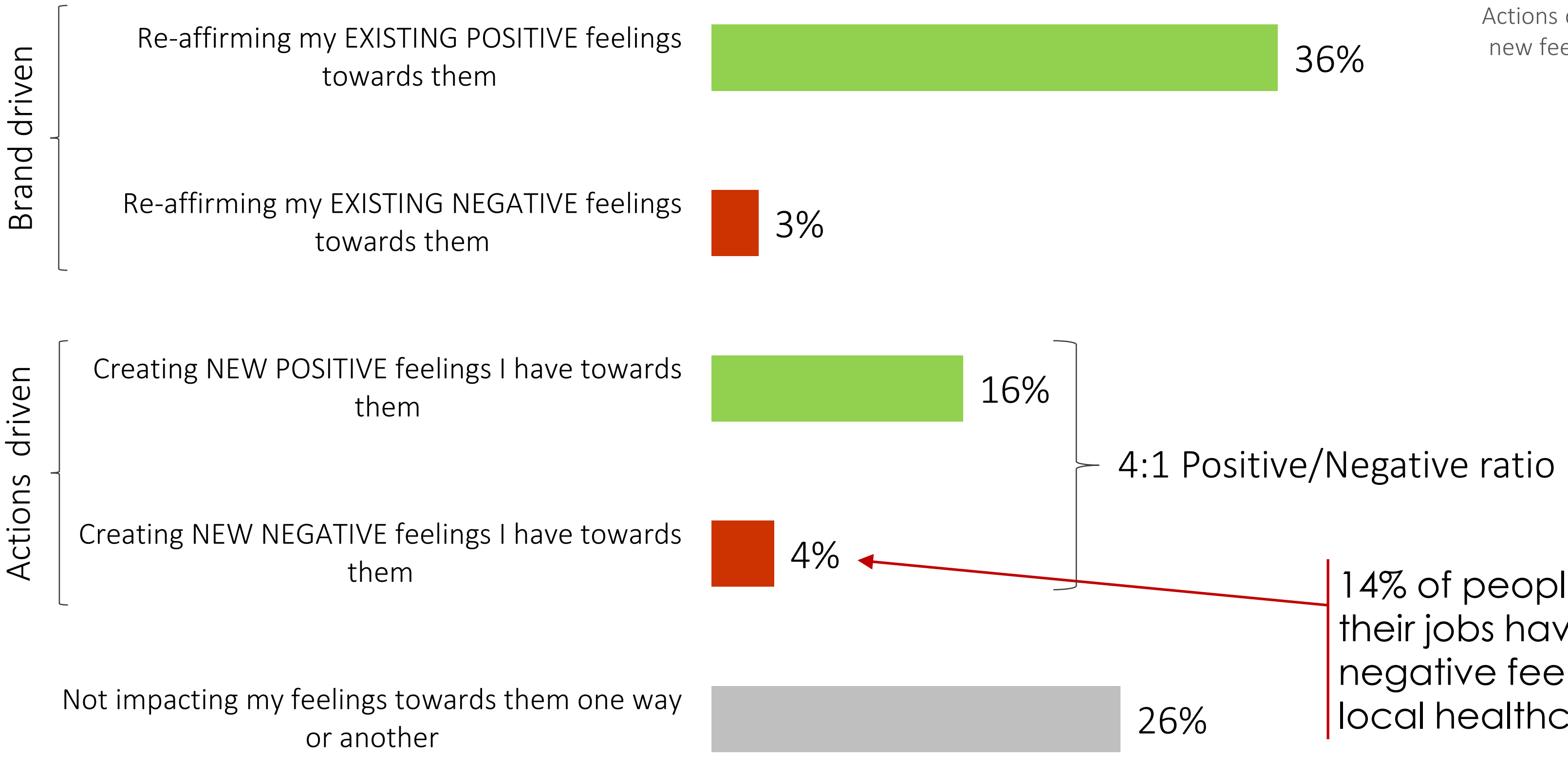
How local providers are handling the Coronavirus

Would You Say Their Actions So Far Are…



14% of people who lost their jobs have new negative feelings towards local healthcare providers

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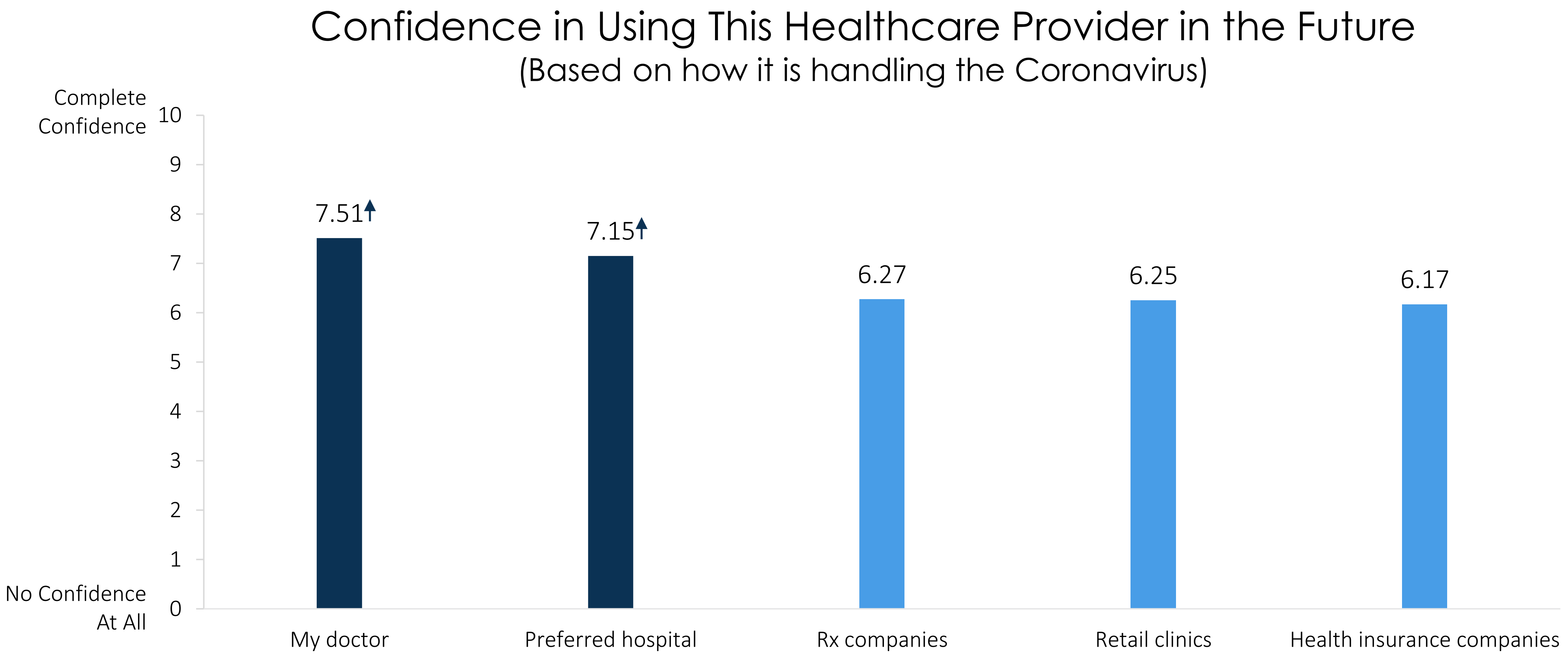
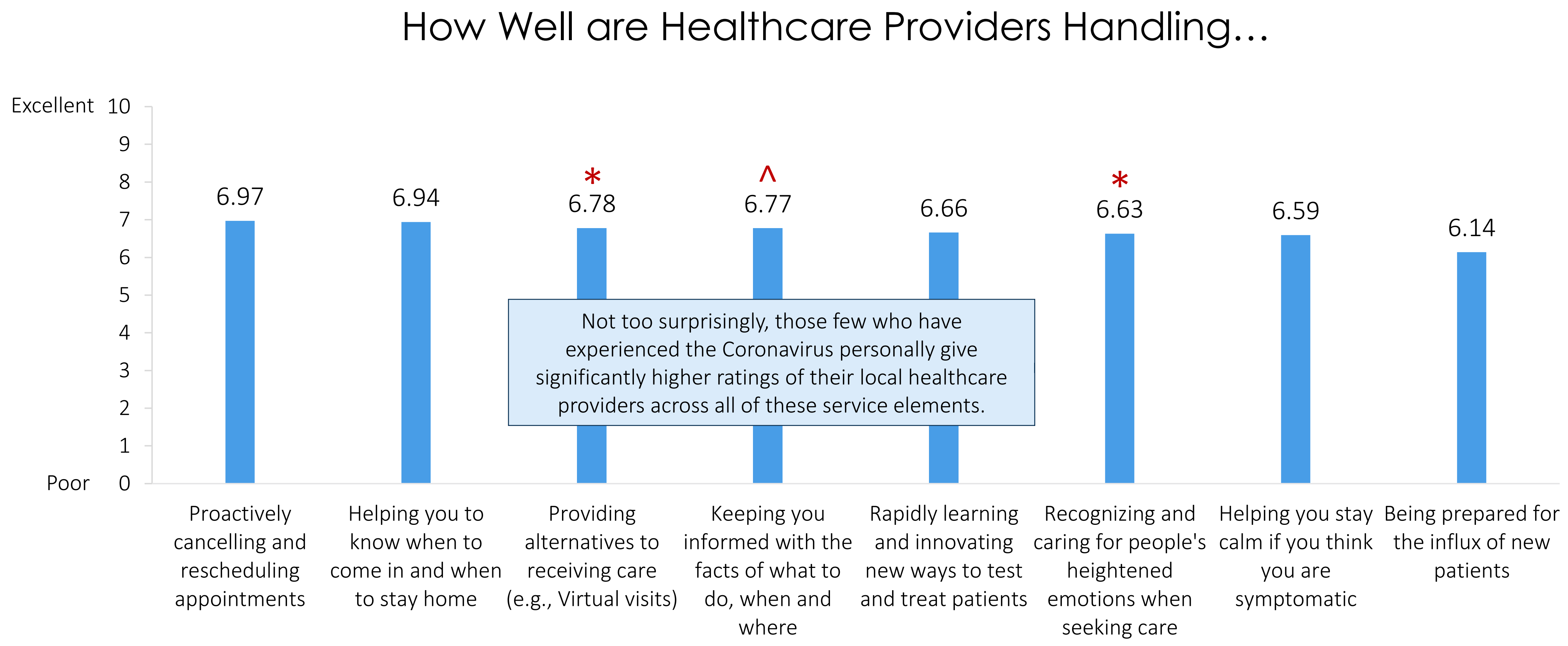
Confidence in healthcare providers in the future



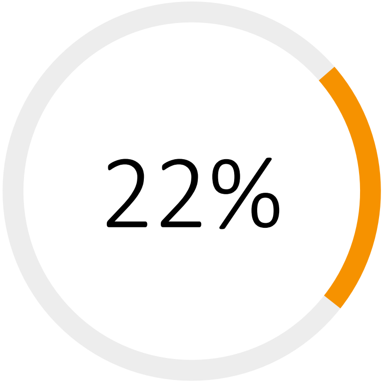
Healthcare providers' handling of the Coronavirus



*=Biggest impact on confidence using doctor in the future
^=Biggest impact on confidence using preferred hospital in the future

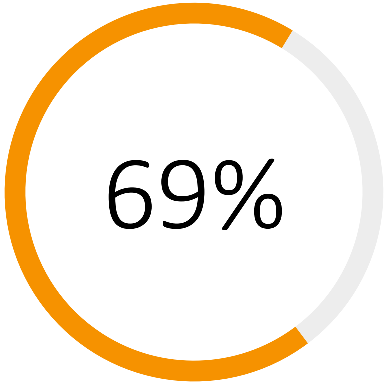
Anything local providers are doing that 'wows' you?

Local Healthcare Providers Innovating that Impressed You



By far the most innovative development patients were most impressed with and want to continue is **Virtual Visits** (either video or phone only).

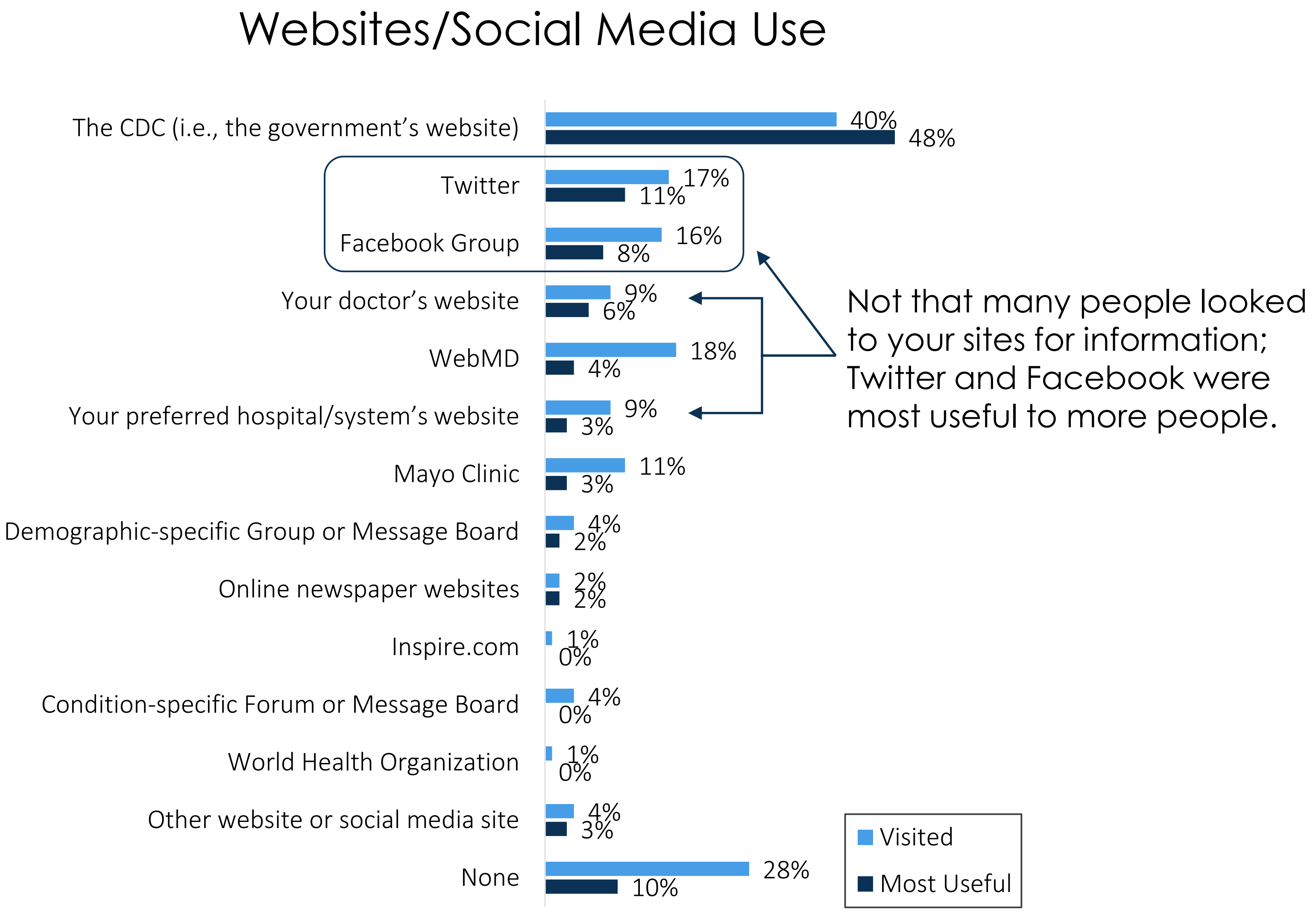
Need to Keep Doing This After the Coronavirus is Over



Interestingly, people who had to work from home are significantly more likely to have found something innovative from their local providers and want it to continue. And that 'something innovative' is virtual care!

Website/Social Media Visits

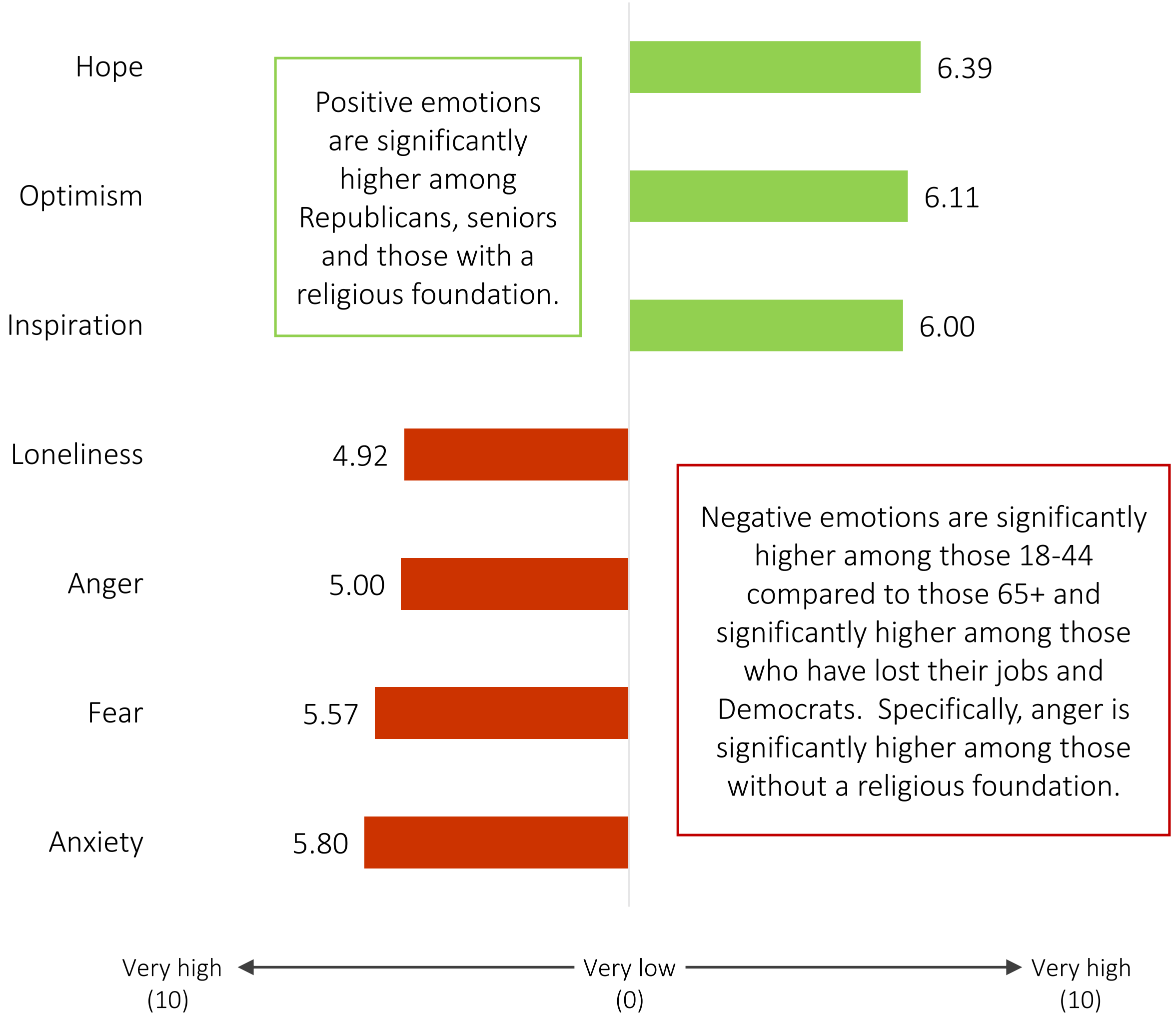
Website/Social media usage during the Coronavirus



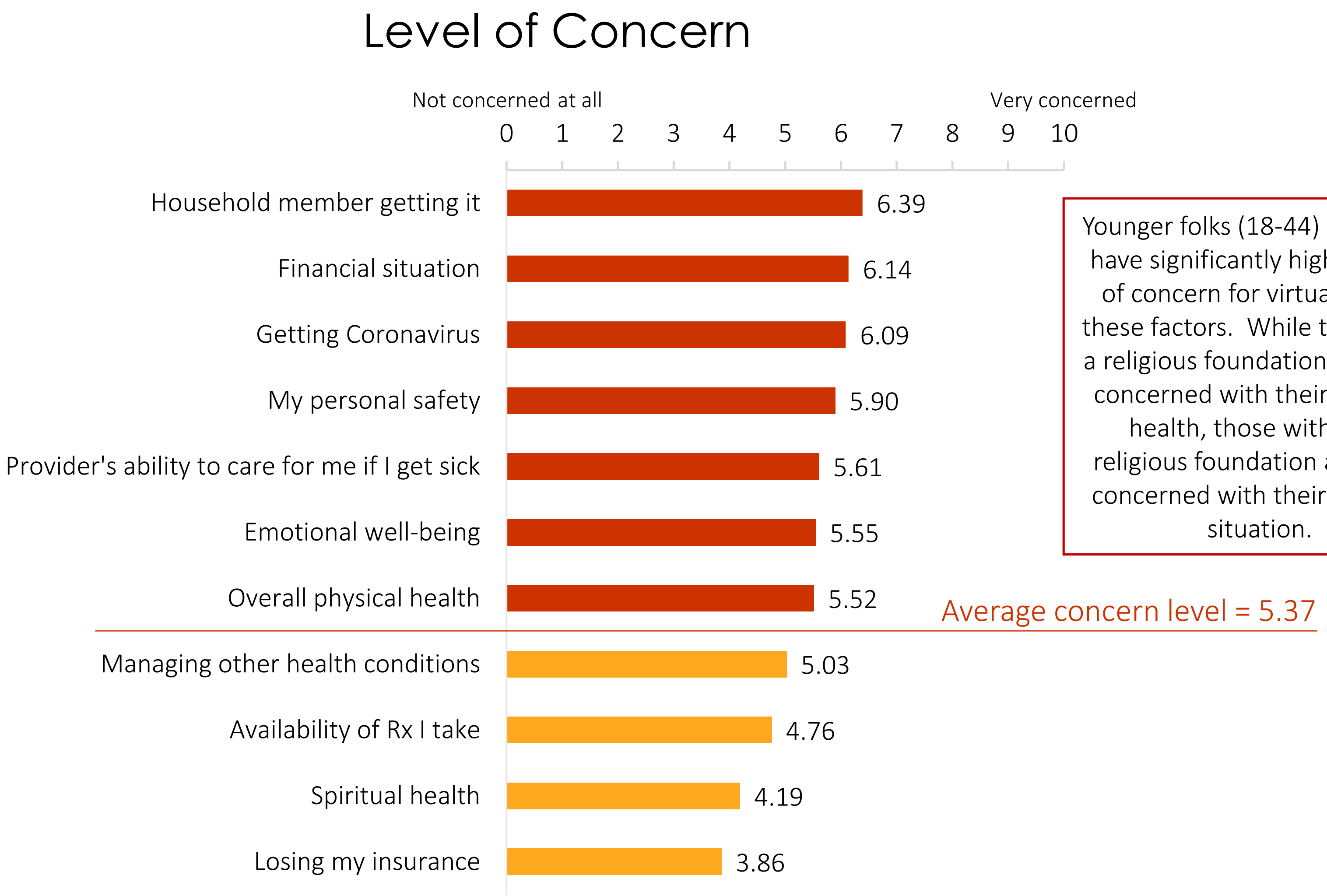
Emotions and Level of Concern

Emotions people are feeling now

Emotions



Level of concern

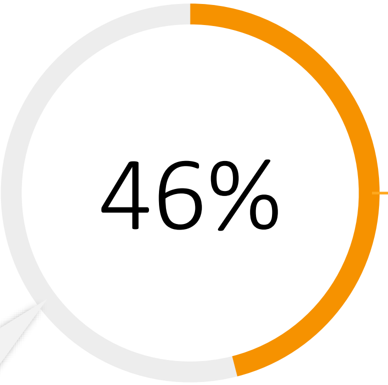


Younger folks (18-44) in general have significantly higher levels of concern for virtually all of these factors. While those with a religious foundation are more concerned with their spiritual health, those without a religious foundation are more concerned with their financial situation.

Are you for or against 'Medicare for All?'

Medicare for all

Americans Who Are For 'Medicare for All'



21% are against it and 33% aren't sure yet

Who are those 46%?

More likely to be:

1) Democrat (66%) vs. Republican (27%)
2) Exposed to Coronavirus (57%)
3) 18-44 years old (55%)
4) African American (64%) and Hispanic (63%)

			Medicare				
Group	Ind	Exchange	Parts A/B	Supplement	Advantage	Medicaid	None
41%	58%	45%	52%	26%	52%	64%	59%

Key take-aways

Key take-aways

1) If you don’t have a virtual care strategy yet, get one now!

2) There will be a much greater need for mental health services (and consumers are already becoming comfortable virtually).

3) Clearly, there is no switch to turn on people’s emotions and get them out the door immediately. People’s inclinations to get back out almost resemble an adoption cycle curve – fewer early adopters and laggards; mostly wait and see’ers in the middle. And, as with any pump, you have to prime it – in this case, with some form of enticement and incentive. What is your plan to prime the pump and entice patients back?

4) While it is too early to develop a specific messaging strategy coming out of this pandemic, clearly recognizing that age and job loss and religious foundation (and even politics) are elements molding people’s outlook on their current situation and the future.

5) More to come as we field Waves 2 and 3 of this research!

Summary of findings

- The vast majority of Americans don't know anyone with the Coronavirus, so their opinions, attitudes, and behaviors are formulated from indirect information (e.g., news and word-of-mouth). For example, Americans with no direct or indirect exposure to the Coronavirus rate the job local healthcare providers are doing in response to the Coronavirus lower than those few who have actually experienced it. This negative reaction may be more a function of the fact that so many other, unrelated scheduled appointments have been cancelled and/or so much job loss.
- Although just 1% of Americans report having the Coronavirus, another one in seven (15%) report being symptomatic; of concern is that more than half of them haven't been able to get tested yet even though they have tried. What's more, men are twice as likely to report being symptomatic as women.
- Among those Americans employed prior to the Coronavirus outbreak, 30% report losing their jobs since then.
- The top-5 most common healthcare behaviors during the pandemic are: 1) going to the PCP; 2) calling a call center; 3) emailing a doctor; 4) visiting a retail clinic; and 5) downloading a hospital/system app. However, most of the healthcare behaviors we evaluated are not new behaviors except for virtual mental health sessions; which tops the list of new behaviors.
- There is strong anticipated demand for several new access tools/services: Virtual visits (general), Hospital apps, and Virtual mental health sessions.
- A quarter of patients who had a consult appointment cancelled changed to a virtual appointment. What will demand look like for virtual consults after the Coronavirus? Could this improve the timeliness of these types of appointments?
- For those patients whose elective procedures and surgeries have been cancelled, many are considering when and if to reschedule them. Strategies to get them back? *(Note: We'll focus more on this in the coming waves of this research.)*

Summary of findings

- Pent up demand: People want to hug not just shake hands. And, people want to go out and shop and eat all the while saving money again. But, a near majority are skittish about starting up social gathering, going to events, traveling, and going out to different places.
- International flying and cruises must brace themselves for significantly lower volume across a longer timeframe.
- The number one innovation that has impressed Americans most – Virtual visits. *What's the old saying? 'It took me years to become an overnight success.'*
- The CDC website is, by far, the most visited site and deemed most useful for Coronavirus information. What's more, consumers are two to three times as likely to go to Twitter and/or Facebook for Coronavirus information than they are their local hospital or doctor's website. We are not part of the conversation as a thought leader.
- Not too surprisingly, Americans' emotions are a bit polarized – Hopeful and Anxious at the same time. Optimism tends to come more from seniors, Republicans and those with a religious foundation. Pessimism tends to come from younger Americans, those who have lost their jobs, Democrats, and those without a religious foundation.
- Nearly half (46%) of Americans currently are for 'Medicare for All.' Not surprisingly, level of support falls squarely across party lines.

Appendix

Demographic profile

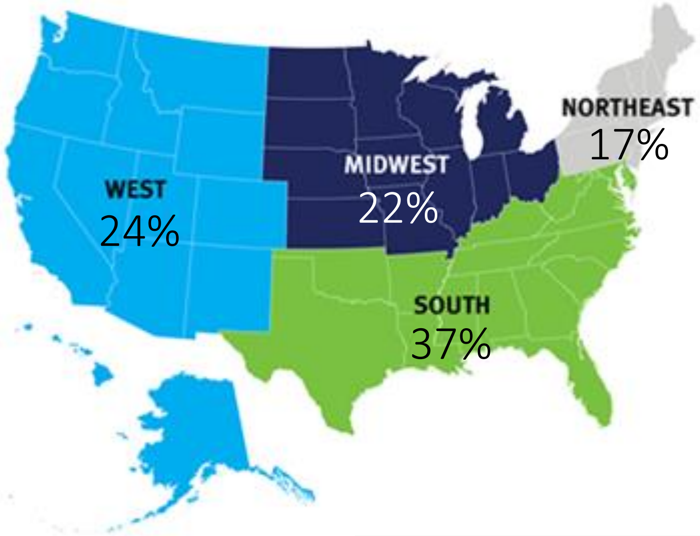
48% 52%

18-44 (46%)

45-64 (37%)

65+ (17%)

Caucasian: 64%
Hispanic: 17%
African American: 12%
Other: 7%



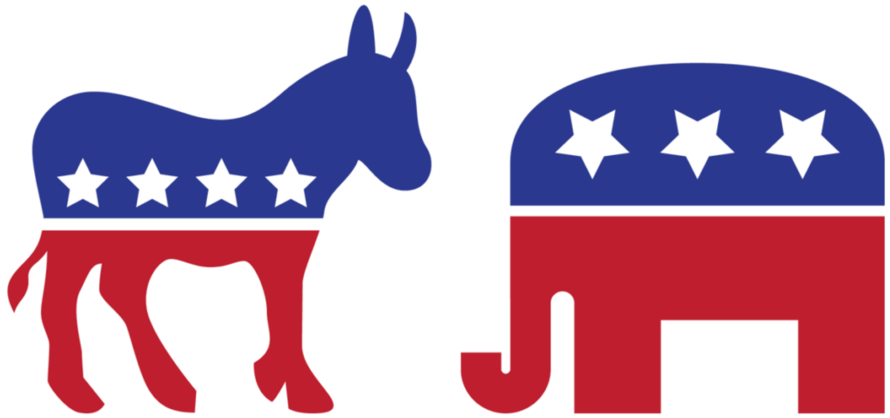
24%
Have kids

19%
Live alone

29%
College

$53,497 – Median household income

How we identify

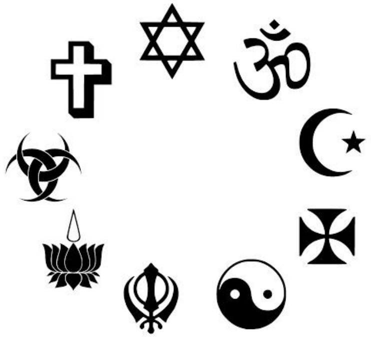


30%
Strongly/
Moderately
Democrat

33%
Independent/
Lean slightly
left/right

25%
Strongly/
Moderately
Republican

Other party: 2%
Not sure: 10%



Catholic: 23%
Other Christian: 27%
Jewish: 3%
Islamic: <1%
Hindu: 1%
Other religion: 5%
No specific religion preference: 26%
Atheist/Agnostic: 8%
Prefer not to share: 7%

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