

Consumer Survey Update

COVID-19

INTRODUCTION

In this consumer survey refresh, we asked a series of questions to find out how COVID-19 has affected consumer perceptions of various healthcare stakeholders, and how they may change their behavior and/or delay care, even after COVID-19 restrictions are lifted.

The results suggest that hospital and health system marketers cannot take a backseat and hope pent-up demand can save their institution from further financial losses.

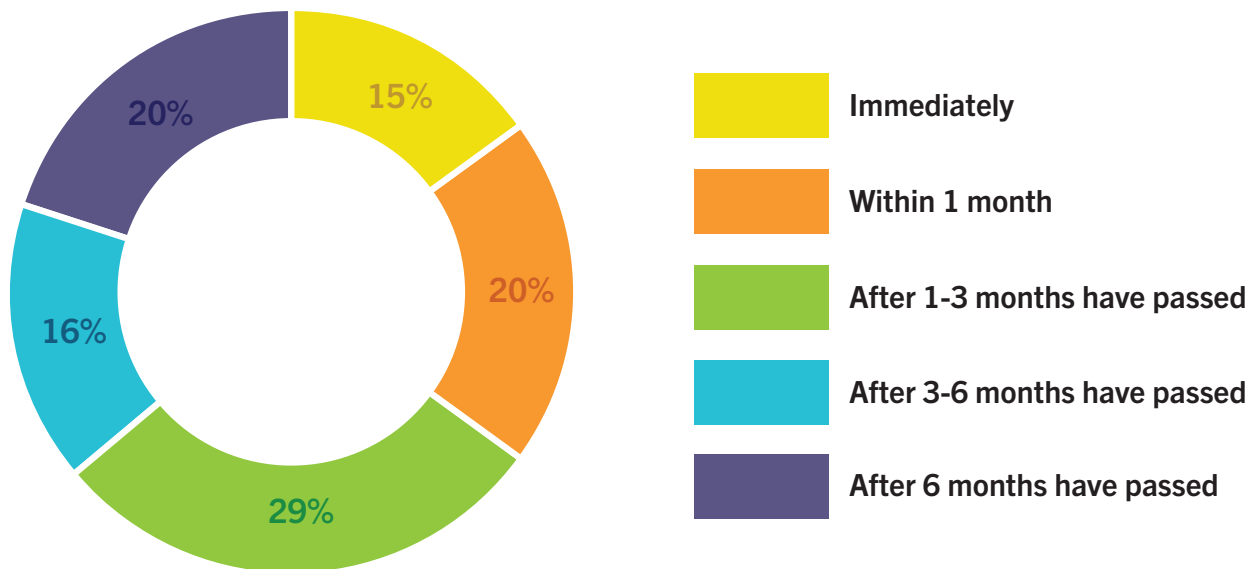
Hospitals and health systems have taken a devastating financial hit in the past few months, forgoing high-margin scheduled surgery volume to meet the needs of society today by treating COVID-19 patients while doing their best to reduce the spread. However, hospital and health system marketers know that when we come down on the other side of the COVID-19 curve, it will be time to turn their attention to retaining the patients who had surgeries delayed, and driving new volume to key service lines.

FINDING

Even after restrictions are lifted, consumers may need coaxing to seek the care they need.

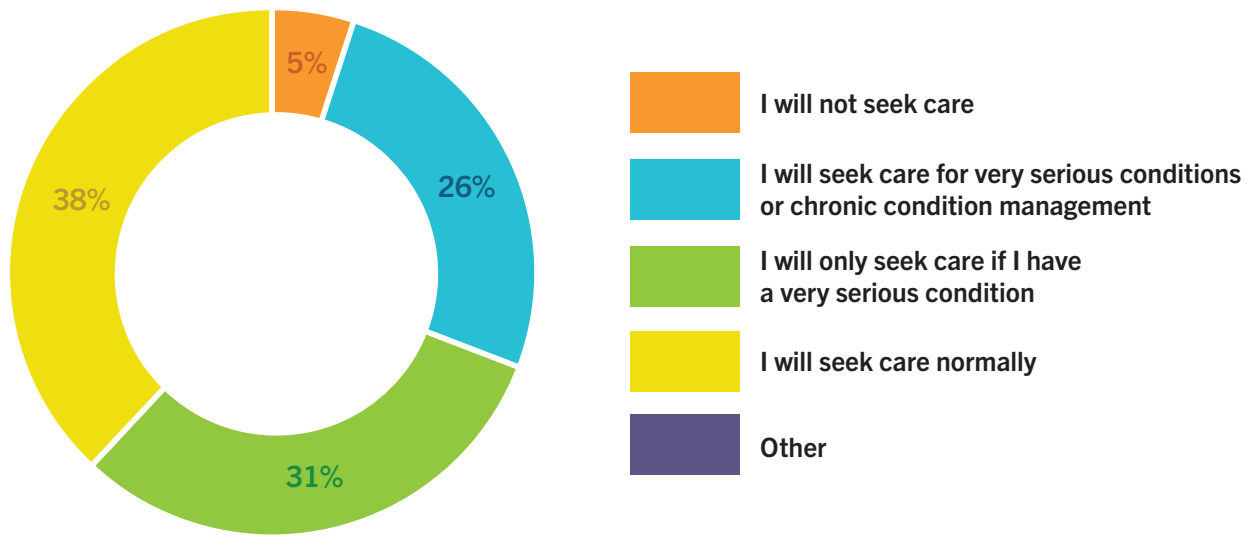
After postponing most elective surgeries amid COVID-19, hospital and health system leaders hope that these patients will come flooding back after restrictions are lifted. However, our findings suggest that not all consumers will be ready to seek care immediately. In fact, over one-third of patients won't feel comfortable returning until over three months after restrictions are lifted. One in five people won't feel comfortable going to their hospital for a procedure until over six months have passed — a time frame that will begin to infringe on the 2020 flu season and the possible resurgence of COVID-19.

Once COVID-19 restrictions are lifted, I would be comfortable entering my local hospital for a medical procedure...



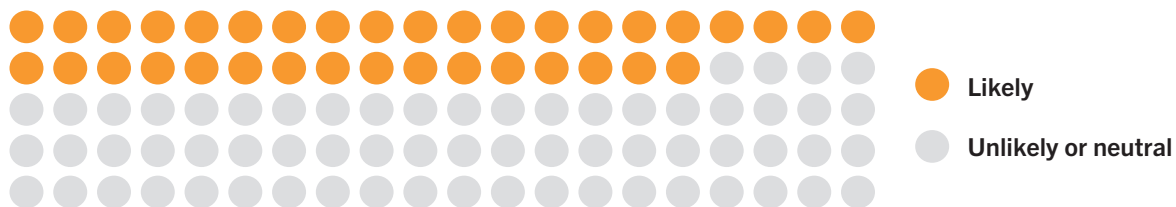
We wanted to get an idea of how many consumers would plan to seek care normally in the months after COVID-19 restrictions are lifted. Among other options, only 38% of respondents reported that they would seek care normally, with a high percentage of respondents indicating that they would only seek care if they had a very serious condition.

In the months after COVID-19 restrictions are lifted, which statement best describes the way you will seek care?



When asked more explicitly about whether they are likely to delay care beyond the point when restrictions are lifted, 36% of consumers reported that they are likely to delay care even after that point.

After restrictions are lifted from the COVID-19 outbreak, how likely are you to delay care?

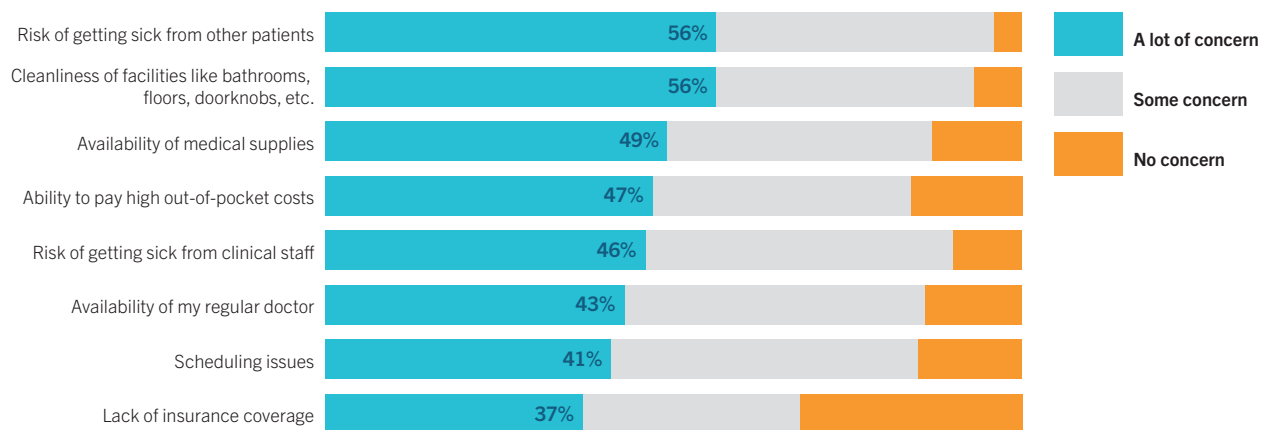


FINDING

Consumers will be concerned about seeking care for a variety of reasons.

If consumers plan to delay care, it's important to know why. People are worried about continued contagion, first and foremost. However, they're also tuning into news right now, which is hyper-focused on the lack of clinical supplies in hospitals during this crisis. Consumers also report high concern for whether there will be enough medical supplies, and whether they'll be able to pay high out-of-pocket costs.

When you think about seeking care after COVID-19 restrictions are lifted, how concerned will you be about each of these factors?



These issues — cleanliness, supply shortages, and patient contagion are not typically top consumer concerns when it comes to their experience of healthcare. Under normal circumstances, consumers are most worried about costs, ability to see their regular doctor, and seamless scheduling. Health system marketers and communicators will need to adapt to address the concerns of consumers in a whole different paradigm after COVID-19 relents.

FINDING

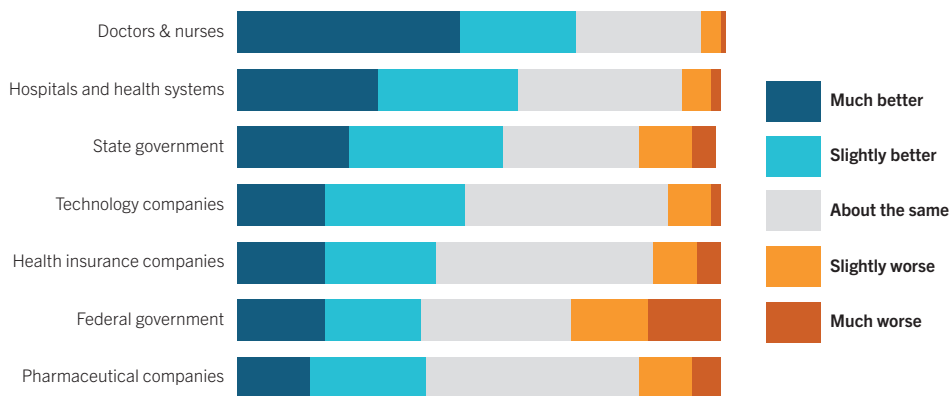
Provider organizations are positioned to address consumer concerns.

There's good news for health systems when it comes to their ability to help consumers navigate challenging times after COVID-19 and get the care they need:

CONSUMERS ARE READY TO LISTEN TO YOUR RECOMMENDATIONS.

Over the course of the COVID-19 crisis, front-line clinical staff, hospitals, and health systems have experienced a sizable surge in consumer regard.

How has the COVID-19 outbreak affected your opinion about each of these sectors or service providers?



As the reputations of many hospitals and doctors have been boosted in these unprecedented conditions, consumers are turning to them as trusted sources above and alongside the CDC for the green light on when they will feel comfortable returning to clinical settings.

What would make you feel more comfortable about going back to a medical facility? Please rank from 1-6, with 1 being the highest.

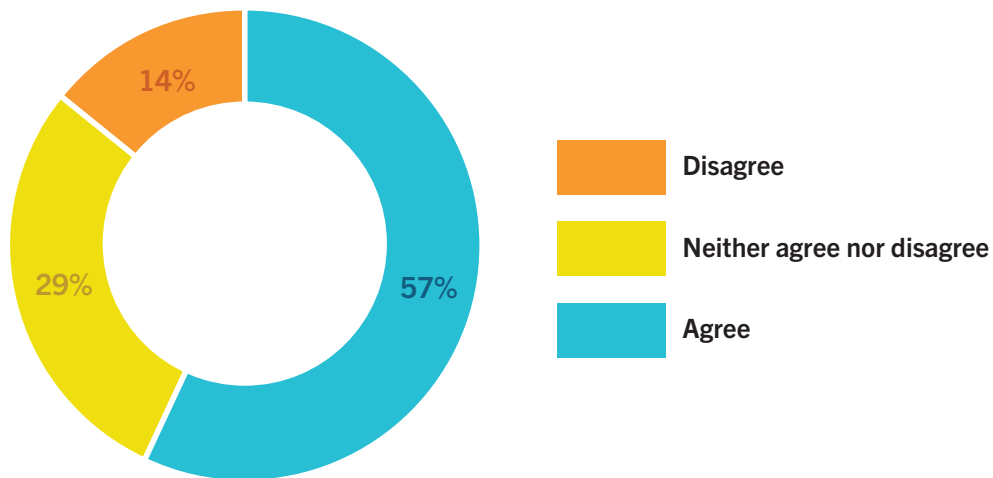
- 1 Your doctor saying it is safe
- 2 CDC saying it is safe
- 3 My local hospital saying it is safe
- 4 My health insurance saying it is safe
- 5 Friends and family saying it is safe
- 6 Media reporting it is safe

FINDING

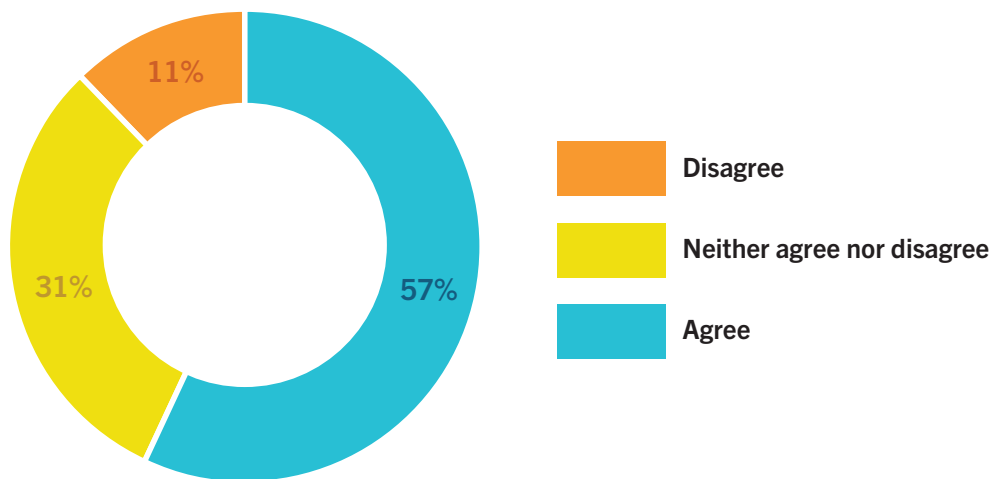
Consumers don't expect much from their health plans.

In a time when hospitals and health systems are bending over backwards to meet the needs of patients, only a very small portion of consumers feel that health insurance companies are falling short in supporting them and clinical staff.

Health plans/insurance companies are adequately supporting consumers/patients during the COVID-19 outbreak

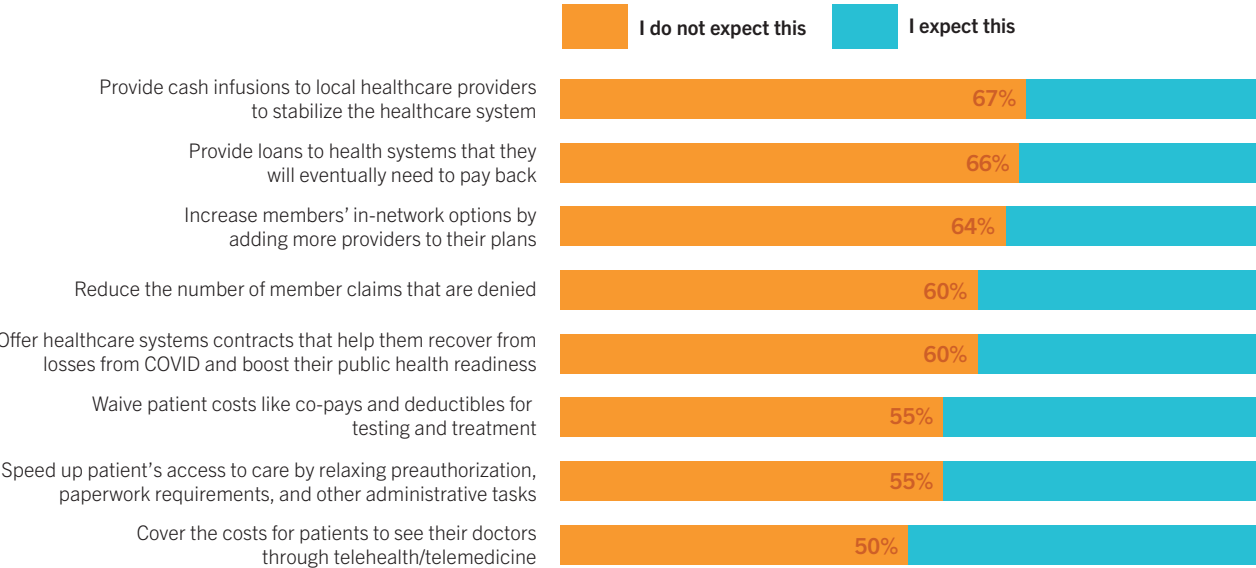


Health plans/insurance companies are adequately supporting doctors/hospitals during the COVID-19 outbreak



When we asked which unusual provisions consumers expect from their health insurance companies in these times, they reported that none of the provisions were overwhelmingly expected. This suggests that when it comes to financial rebound, health systems will be on their own in managing consumer understanding of their increased need for health plan collaboration.

When you think about what you expect from health insurance companies in these times, please rate your expectation for the following:

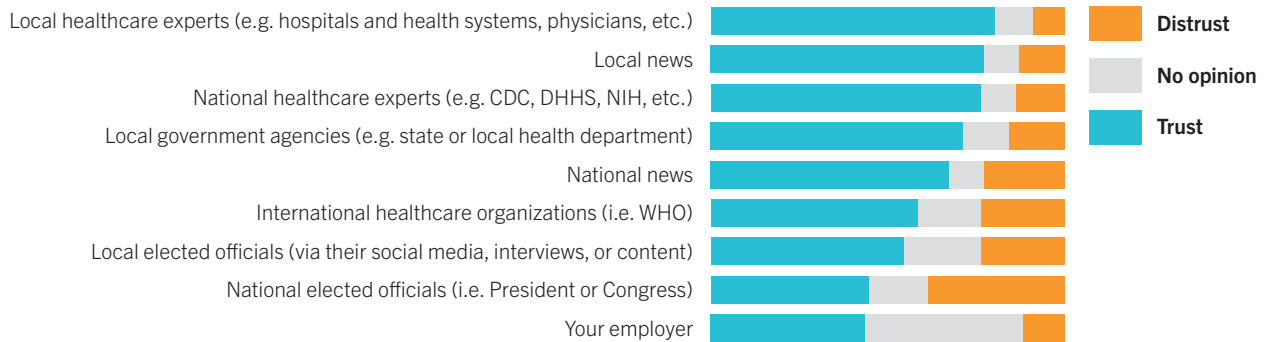


Updates

Beyond the featured findings of this report, we've tracked consumer responses to a number of other questions over the past few weeks. The following updates show only the meaningful variations or noteworthy consistencies in the data from one survey to another.

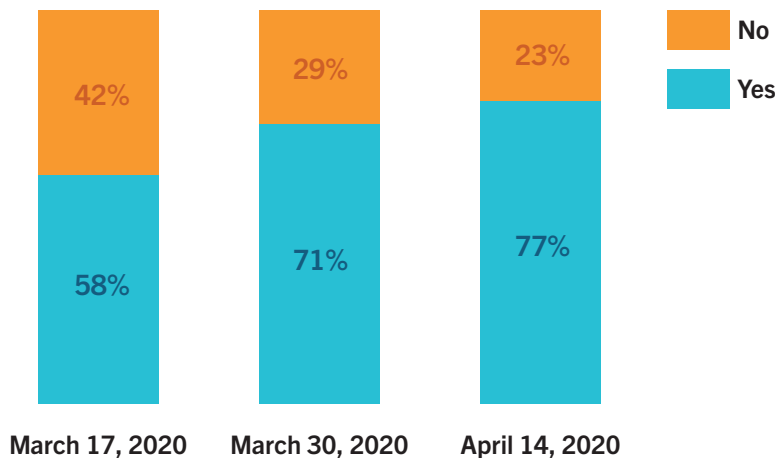
UPDATE #1: HOSPITALS, HEALTH SYSTEMS, AND PHYSICIANS ARE STILL THE MOST TRUSTED VOICES WHEN IT COMES TO COVID-19 COMMUNITY IMPACT

Who do you trust the most to explain the unfolding coronavirus/COVID19's impact on your household and your community?



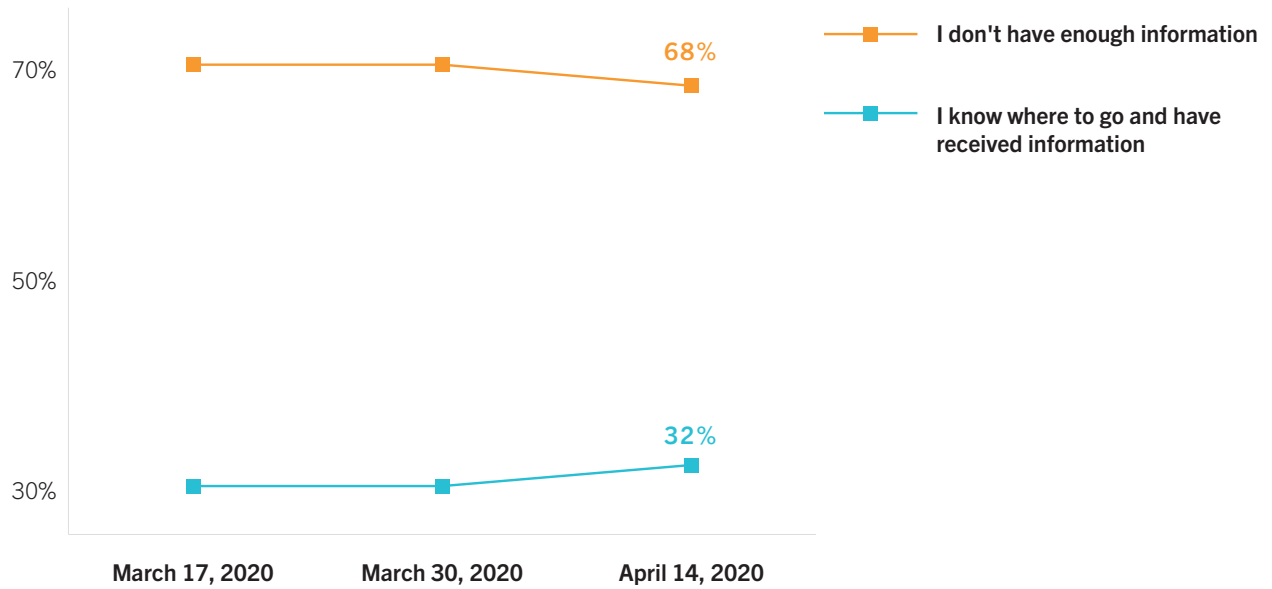
UPDATE #2: TELEHEALTH AWARENESS STILL RISING

Have you heard of telehealth or virtual care?



UPDATE #3: CONSUMERS STILL DON'T KNOW HOW TO GET TESTED

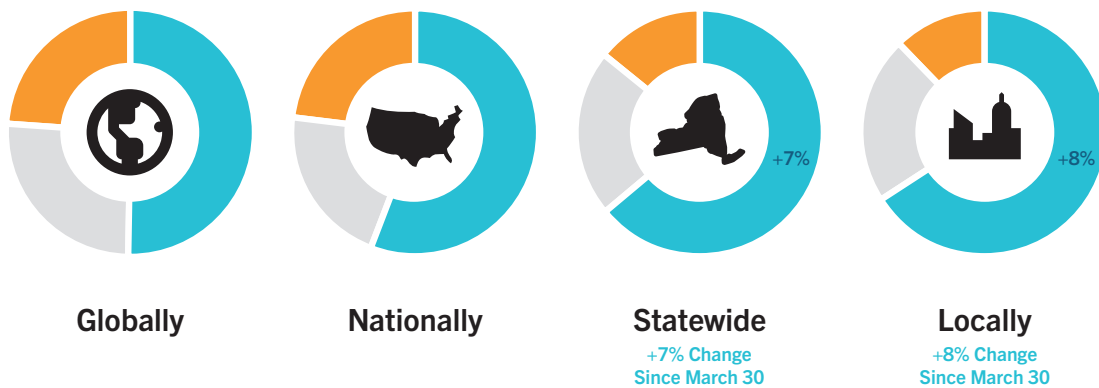
Do you know how to go about getting tested for the novel coronavirus/COVID19?



UPDATE #4: CONSUMER MOODS ARE TURNING UP SLIGHTLY

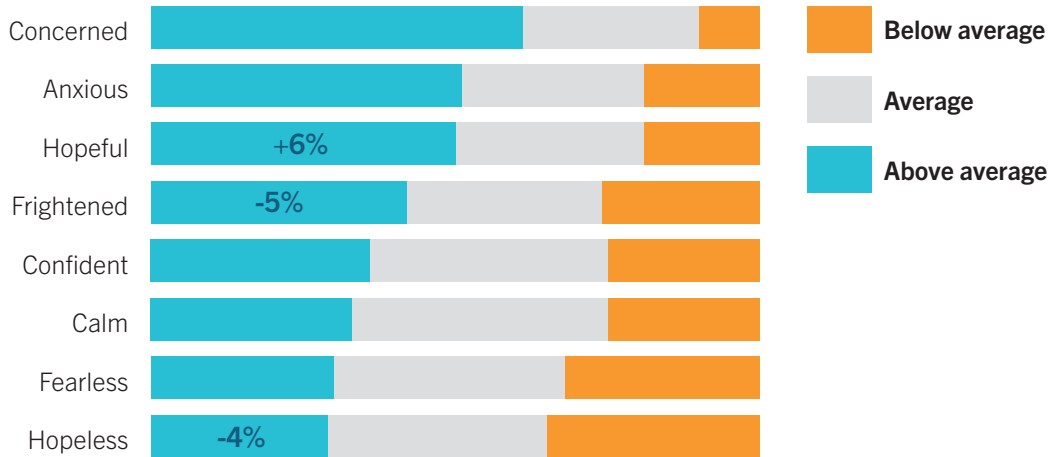
How would you describe your feelings on the containment/mitigation of the current pandemic in the following locations?

■ Optimistic
 ■ Neither optimistic nor pessimistic
 ■ Pessimistic



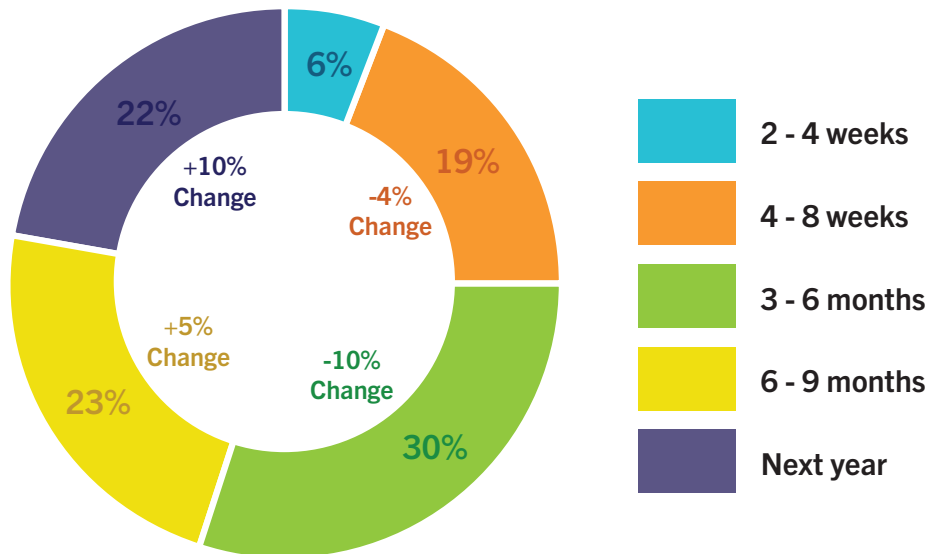
UPDATE #4: CONSUMER MOODS ARE TURNING UP SLIGHTLY (CONT'D)

How would you rate your current mood based on the current pandemic's impact on your local area?



UPDATE #5: THE HORIZON FOR WHEN THINGS WILL BE “BACK TO NORMAL” GOT FURTHER AWAY

How long do you think it will take for life to get back to normal?



CONCLUSION

ReviveHealth is committed to bringing you insights from what we hear in the industry, but also the latest on consumer needs. We believe in a time like this, health system marketers and communicators have the opportunity and responsibility to meet the needs of consumers in a profoundly unique way, while also acting as true business drivers in some of the toughest financial times in their institutions' histories.

SURVEY METHODOLOGY

This COVID-19 Consumer Survey was conducted via [Pollfish](#) to include respondents across the U.S. who were 25 years and older which resulted in 700 responses. This allowed for an MOE (margin of error) of 4% at a 95% confidence interval for the current U.S. population. Results were post-stratified in order to weight results to achieve a distribution equal to the known age and gender characteristics of the current U.S. population. The survey instrument is linked [here](#).