



# COVID-19 Consumer Behavior

## Key Findings and Takeaways from Wave 5 of the Optum Consumer Pulse Survey

July 16, 2020



# Overview of the Optum Consumer Pulse Survey

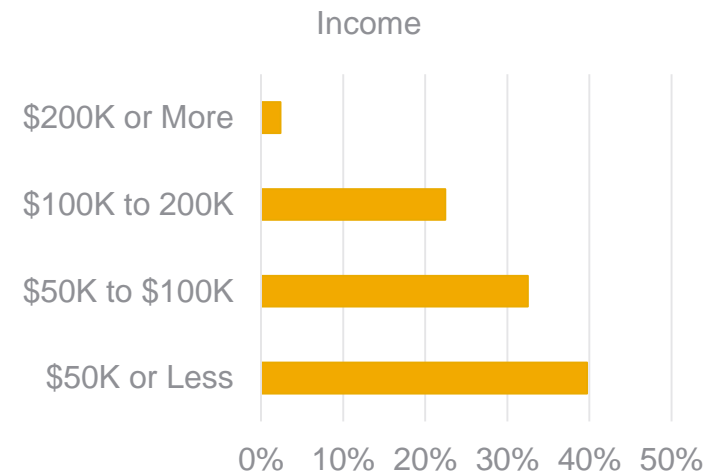
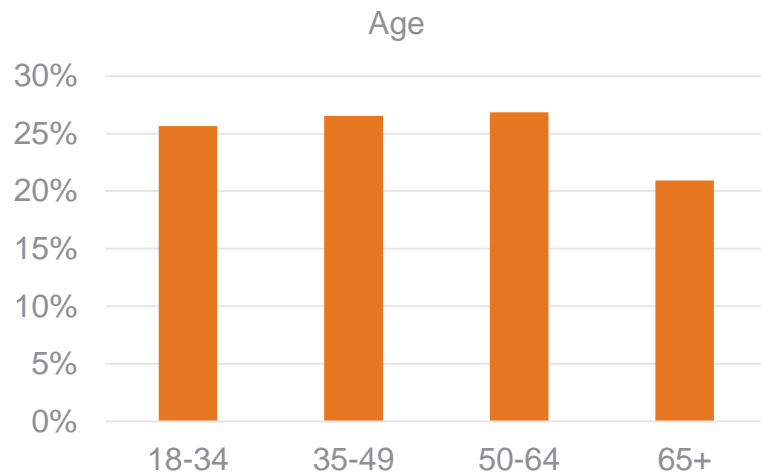
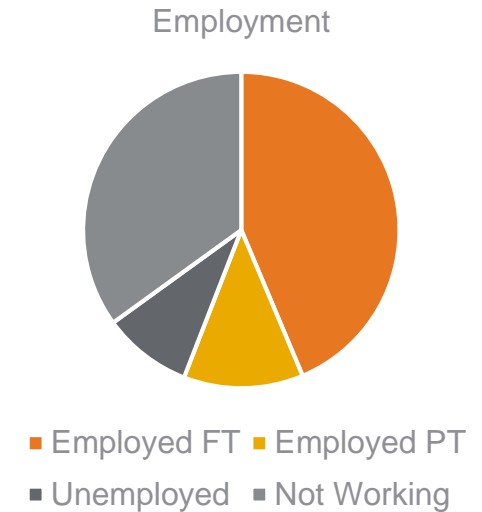
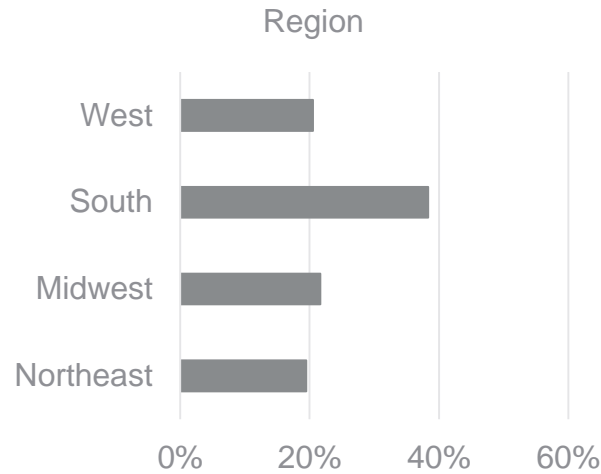
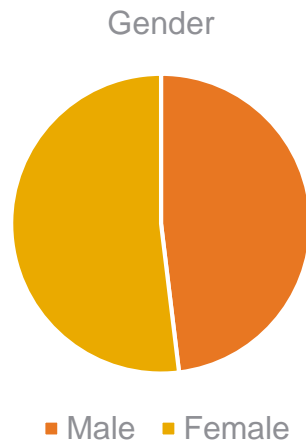
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## Key findings and takeaways

- Healthcare executives are seeking to better understand how consumers will engage with healthcare providers post COVID, including what services are most likely to be utilized first and which services consumers may delay or put off for a period of time after re-opening.
- Armed with up-to-date consumer feedback from more than 700 consumers nationwide in our **Consumer Pulse Survey**, we can better assist our partners with planning for re-opening of services and messaging effectively to consumers and patients. This report summarizes the findings from Waves 1-5 of a six-part research series that began May 4.
- In addition to the self-reported consumer data presented here, our **COVID Concern Index** incorporates individual demographic, psychographic and behavioral data combined with Optum's powerful predictive models to identify exactly which consumers are ready to engage in your market. For more information, including a free analysis of consumers and opportunities in your local market, please contact Brian Michels at [michelsb@optum.com](mailto:michelsb@optum.com)

# Consumer Pulse Survey respondent profile

Summary of Wave 5 (6/29 - 7/3) respondent profiles. Organized for ease of use. N = 700 and MOE of +/- 4%



# Key findings and takeaways

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Consumer sentiment toward seeking care has plateaued and appears to be shifting backwards, due in part to regional changes in the spread of the virus.

- For the first time in our survey, the number of **consumers who are likely to reschedule or postpone a medical procedure in a hospital has increased** – rising 4 percentage points to 57% in our most recent wave.
- Along our “Consumers Likely to Postpone Care” Curve, the percentage who say they “Definitely Would” postpone rose three points while those who say they “Definitely Would Not” postpone dropped two points.
- The percentage of consumers in the Northeast and Midwest who say they would postpone continues to fall, while those in **the South and West reversed course and rose**. Consumers in the South who would postpone care rose 4 percentage points and consumers in the West who would postpone care rose 7 percentage points.

## Key findings and takeaways CONTINUED

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A growing number of unemployed consumers are likely to postpone care or not seek care altogether.

- **Key findings from our study that reflect the disparity in the employed and unemployed:**
  - 57% of unemployed consumers are likely to avoid **outpatient care** today vs. 37% of employed consumers.
  - 52% of unemployed consumers are likely to avoid **hospital care** today vs. 35% of employed consumers.
  - 39% of unemployed consumers are likely to avoid **physician care** today vs. 26% of employed consumers.
  - 27% of unemployed consumers are likely to avoid **emergency care** today vs. 19% of employed consumers (even for a life threatening illness such as a heart attack or appendicitis).

## Key findings and takeaways CONTINUED

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A majority of consumers are willing to seek care in a physician's office today, but almost as many would prefer to do so virtually; and age plays a role.

- The number of **consumers who are likely to keep a previously scheduled doctor's appointment rose back to 70%** or where it was one month ago.
- **Younger consumers are less likely to see a physician** with just 37% of those ages 18-34 saying they are Very Likely or Definitely Would see a physician today vs. 68% of those who are 65+ years of age.
- We also see **stark differences by gender and age**: 91% of males 65+ are likely to see a physician and 73% are likely to visit a hospital. Among women 65+ just 73% would see a physician and only 45% would visit a hospital today.
- The percentage consumers who **would prefer to use a virtual platform** like telehealth to see their physician is unchanged at 58%, and remains highest among younger consumers.



## Key findings and takeaways CONTINUED

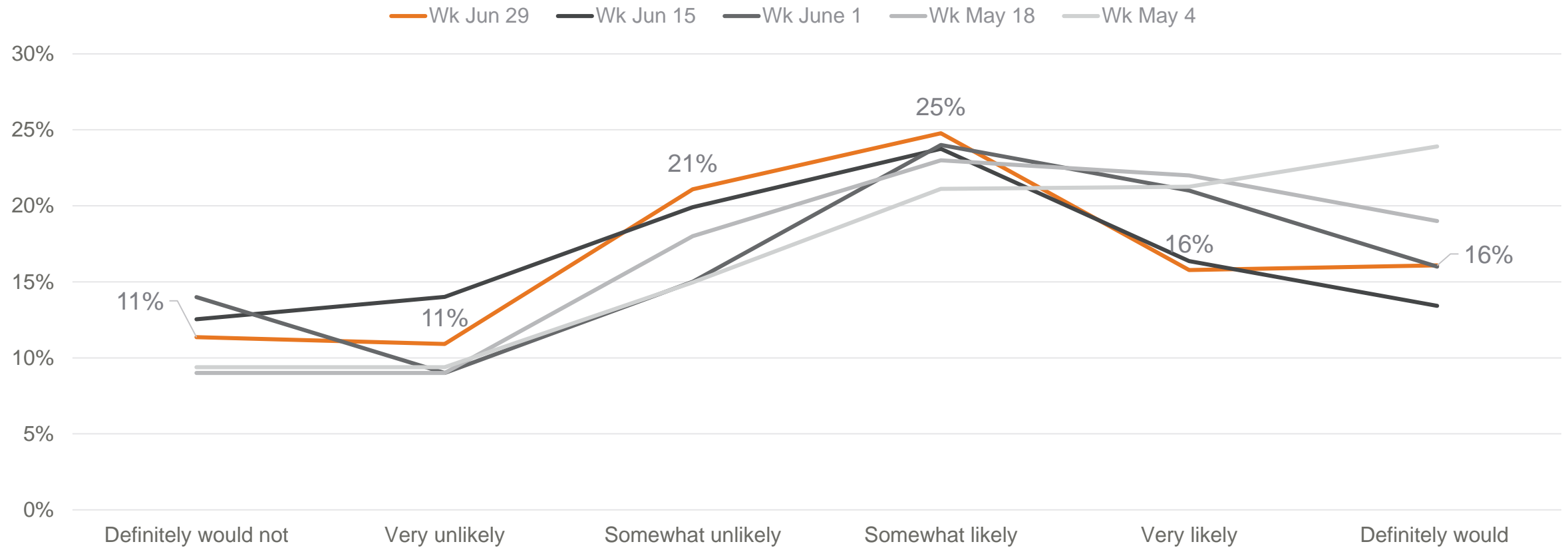
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Healthcare brands remain important for almost all consumers with about one in three still saying they are even more important today.

- In our new survey question asking consumers how much more important healthcare brands are as a result of COVID, we find **31% still believe brands are more important while just 9% say they are less important.**
- Younger consumers are most likely to say brand importance has grown with **43% of consumers ages 18-34 saying brands are Somewhat or Much More important.**
- More than one in three consumers in the **South (35%) are likely to say brands are more important** while just one in four (25%) in the Midwest say brands are more important.

# “Consumers likely to postpone care” curve plateaus out

How likely are you to reschedule or postpone a medical exam or procedure at a hospital that was scheduled for today because of COVID-19?



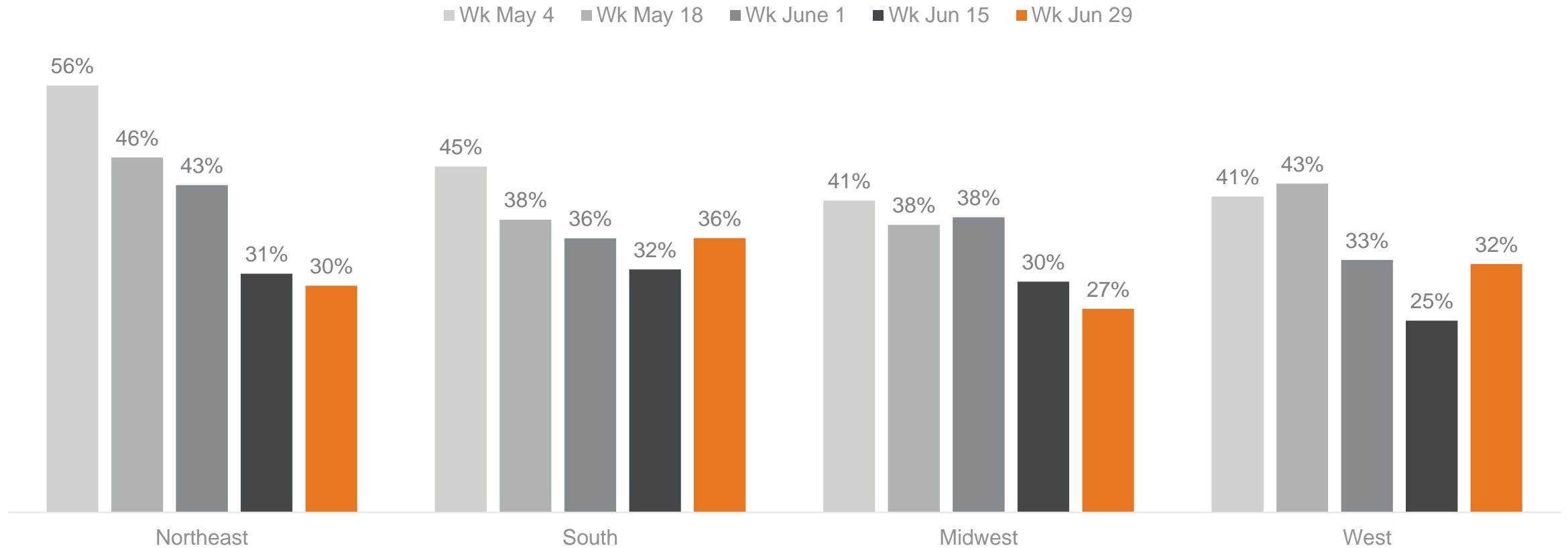
Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020





# Regional differences beginning to reflect COVID-19 spread

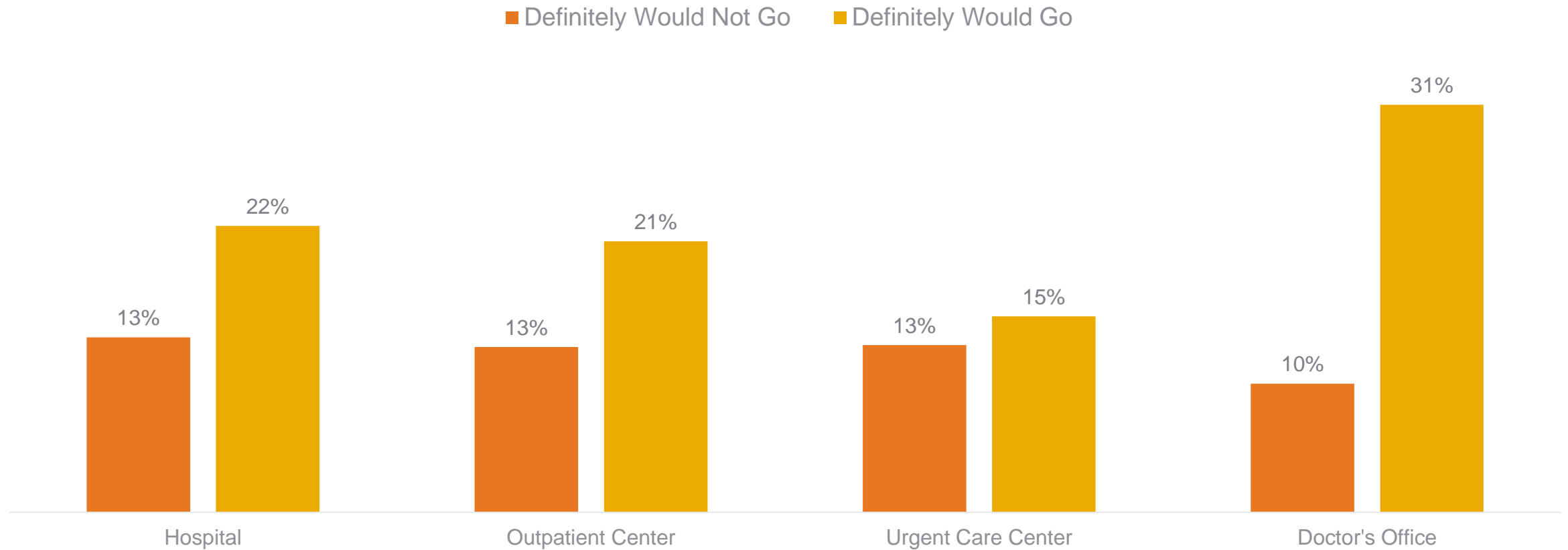
*How likely are you to reschedule or postpone a medical exam or procedure at a hospital that was scheduled for today because of COVID-19? **Very Likely and Definitely Would Combined***



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

# Consumers are still most likely to visit physician offices

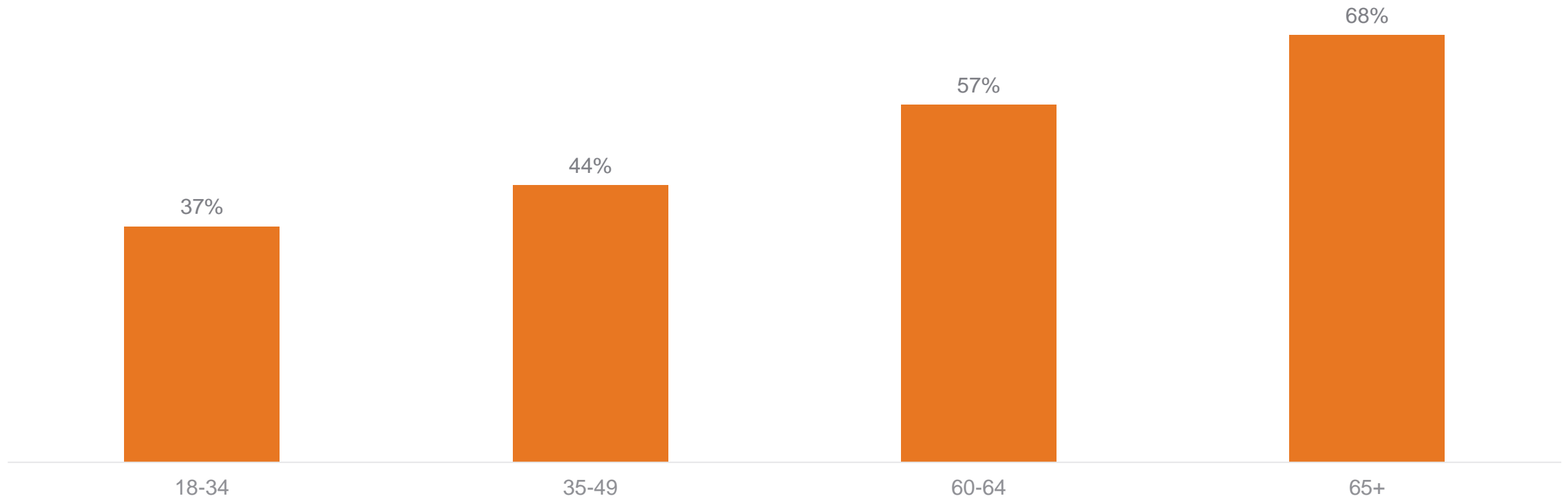
Wave 5 Top Box Scores: Summary findings of those consumers who report they **Definitely Would** or **Definitely Would Not** go to the following healthcare facilities for care today.



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

# Younger consumers are **less likely to see a physician**

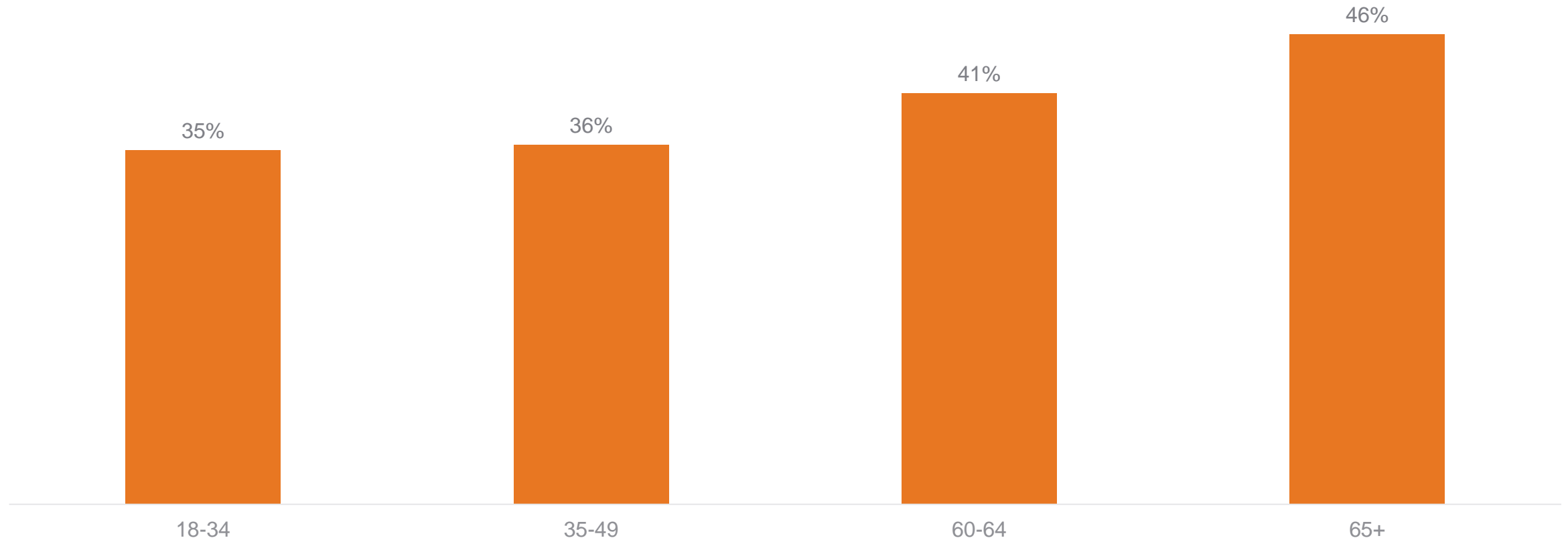
*How likely are you to go to an appointment with your doctor today, if it was already scheduled and there were no cancellation fees? **Very Likely and Definitely Would Combined***



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

# Younger consumers are **less likely to visit a hospital**

*How likely are you to go to a hospital for an elective procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees? **Very Likely and Definitely Would Combined***

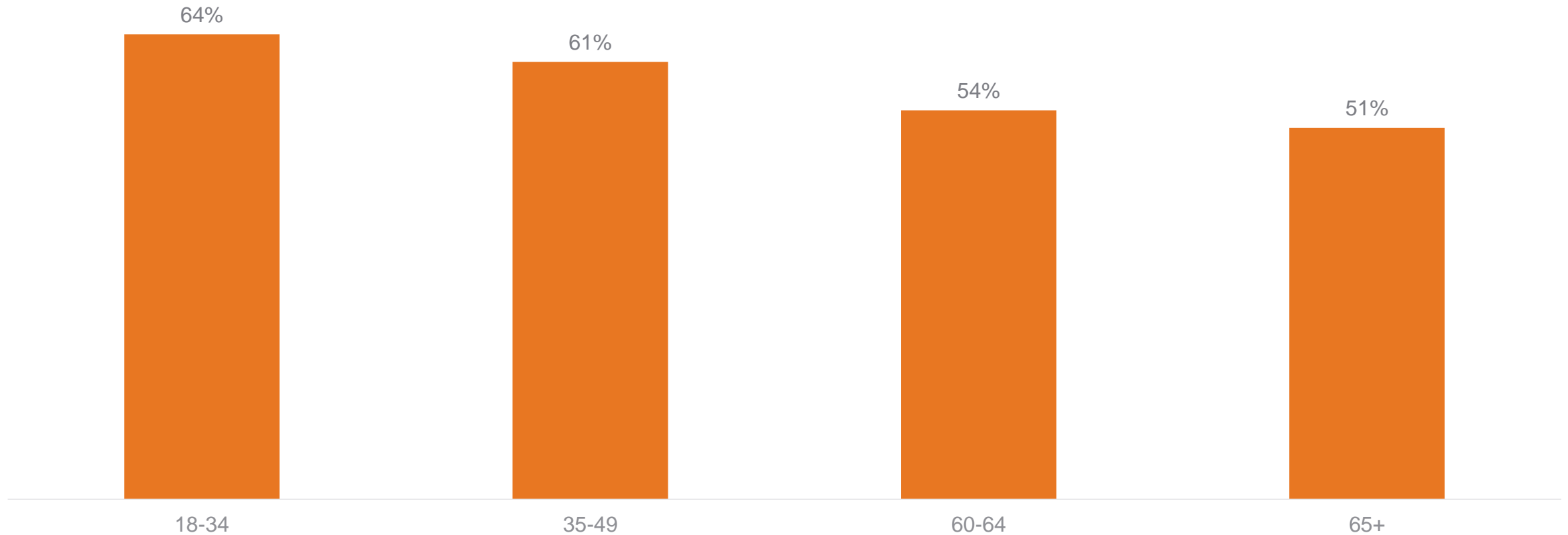


Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020



# Younger consumers are more likely to prefer virtual care

*If you had an in-person visit scheduled with a doctor today, how likely are you to use telehealth or a virtual care service instead to avoid going to a doctor's office? **Percent Likely***



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

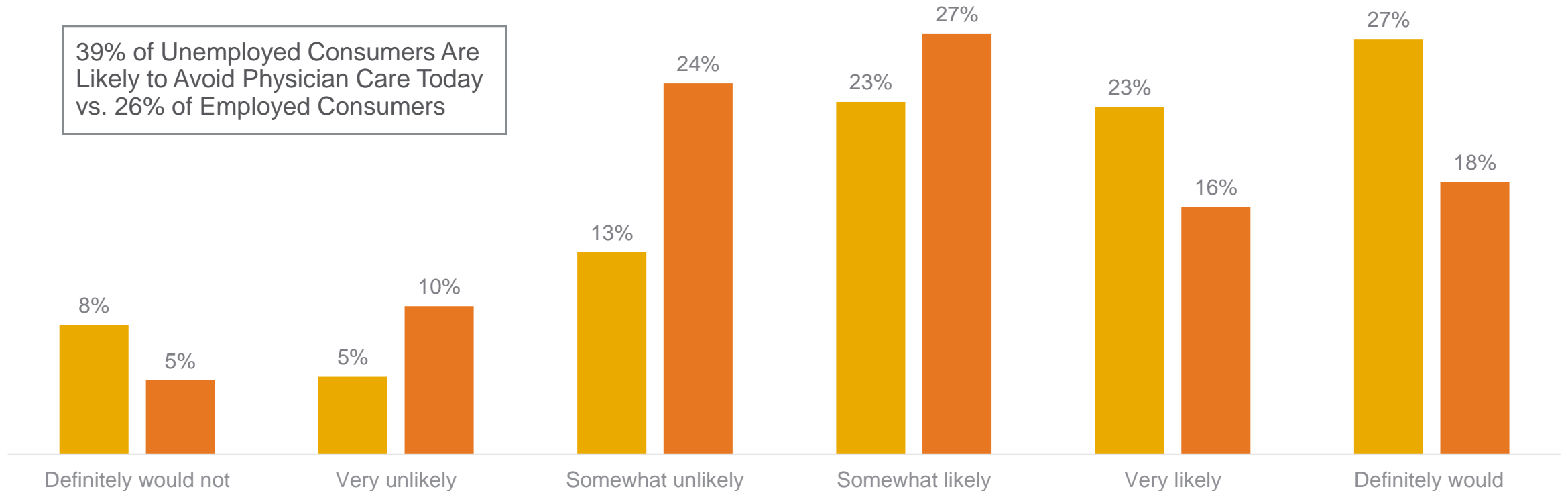


# Unemployed consumers more likely to avoid **physician care**

*How likely are you to go to an appointment with your doctor today, if it was already scheduled and there were no cancellation fees?*

■ Employed ■ Unemployed

39% of Unemployed Consumers Are Likely to Avoid Physician Care Today vs. 26% of Employed Consumers



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020



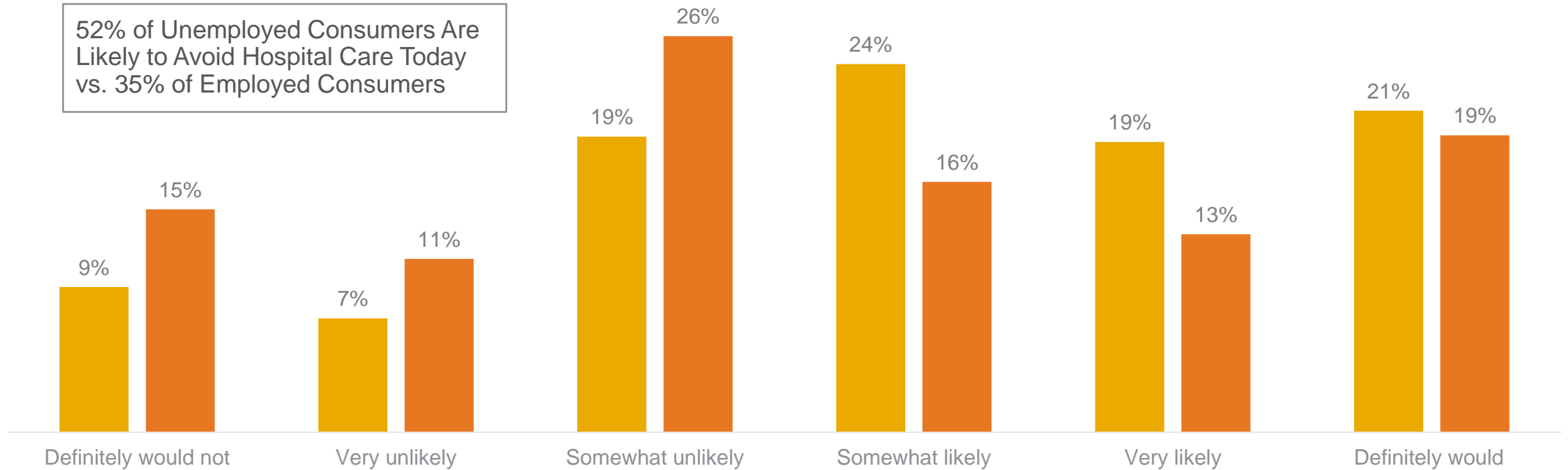


# Unemployed consumers more likely to avoid hospital care

*How likely are you to go to a hospital for an elective procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees?*

■ Employed ■ Unemployed

52% of Unemployed Consumers Are Likely to Avoid Hospital Care Today vs. 35% of Employed Consumers



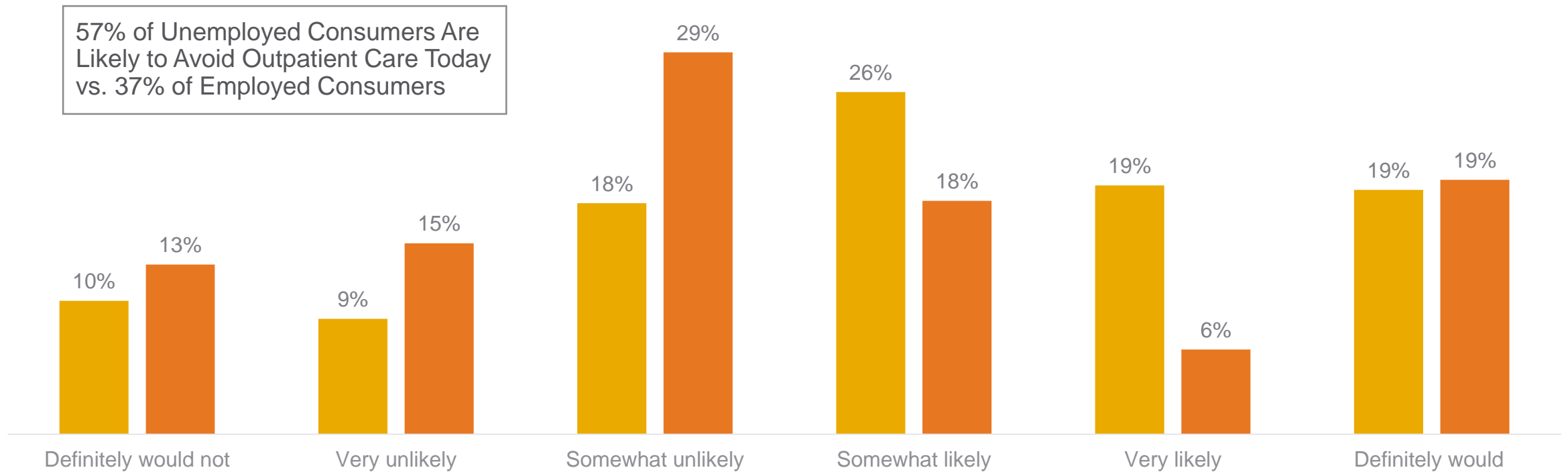
Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

# Unemployed consumers more likely to avoid outpatient care

*How likely are you to go to an appointment with your doctor today, if it was already scheduled and there were no cancellation fees?*

■ Employed ■ Unemployed

57% of Unemployed Consumers Are Likely to Avoid Outpatient Care Today vs. 37% of Employed Consumers



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

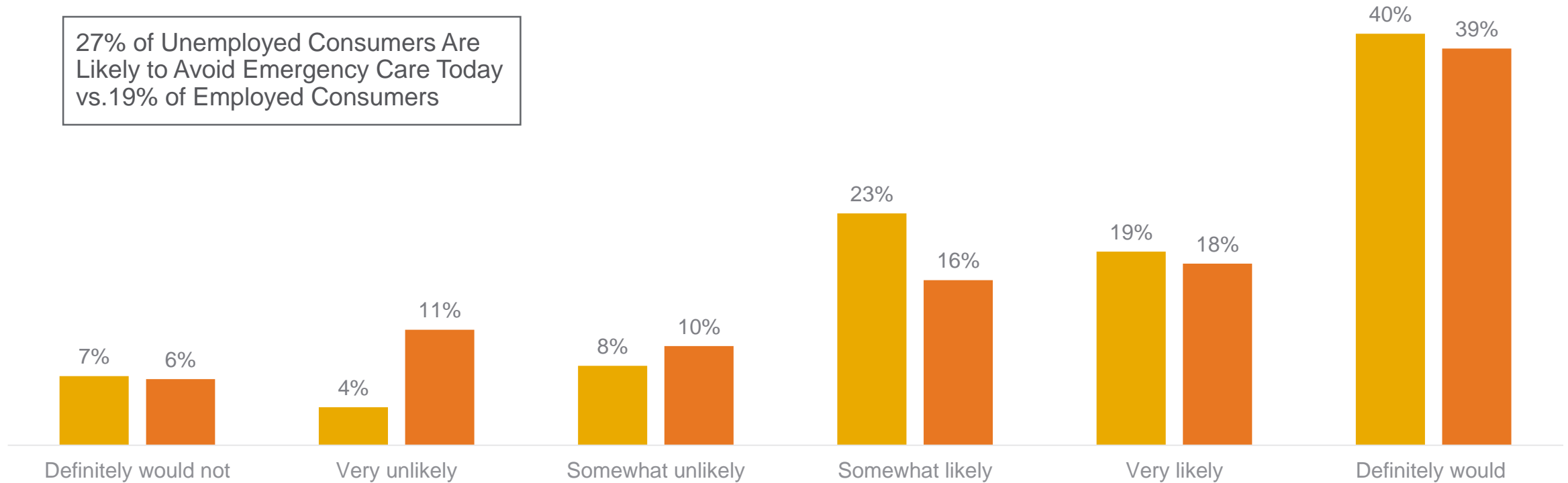


# Unemployed consumers more likely to avoid emergency care

*How likely are you to go to a hospital emergency room if you show symptoms of a heart attack or appendicitis today?*

■ Employed ■ Unemployed

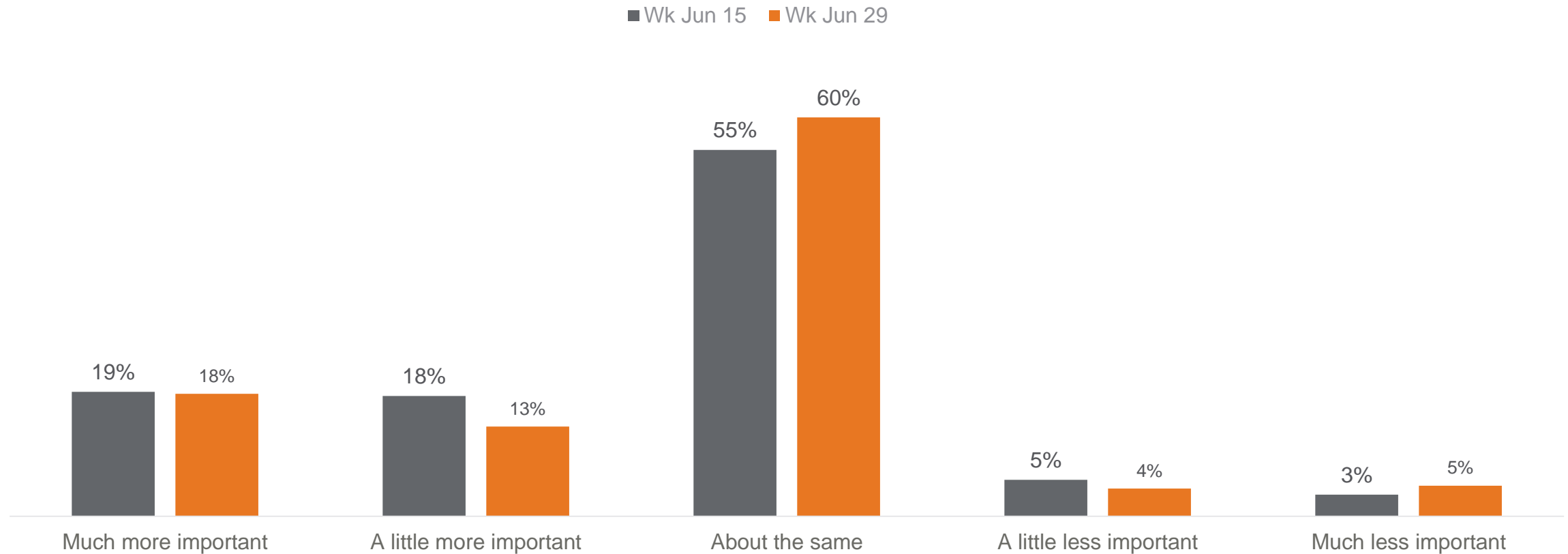
27% of Unemployed Consumers Are Likely to Avoid Emergency Care Today vs. 19% of Employed Consumers



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

# One in three still view brands as more important today

*How much more important to you is the brand name/reputation of your health care provider now, in comparison to before the COVID outbreak?*



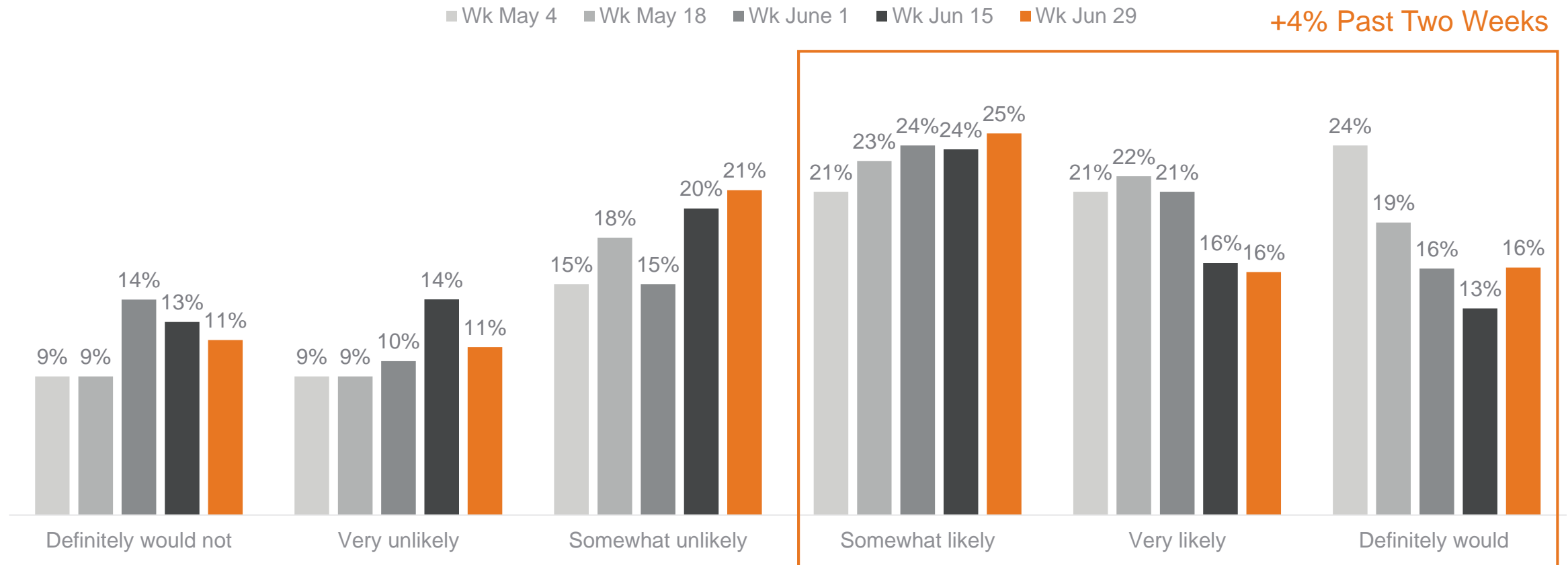
Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

# Use of hospitals and health systems



# 57% still likely to postpone hospital care today

*How likely are you to reschedule or postpone a medical exam or procedure at a hospital that was scheduled for today because of COVID-19?*



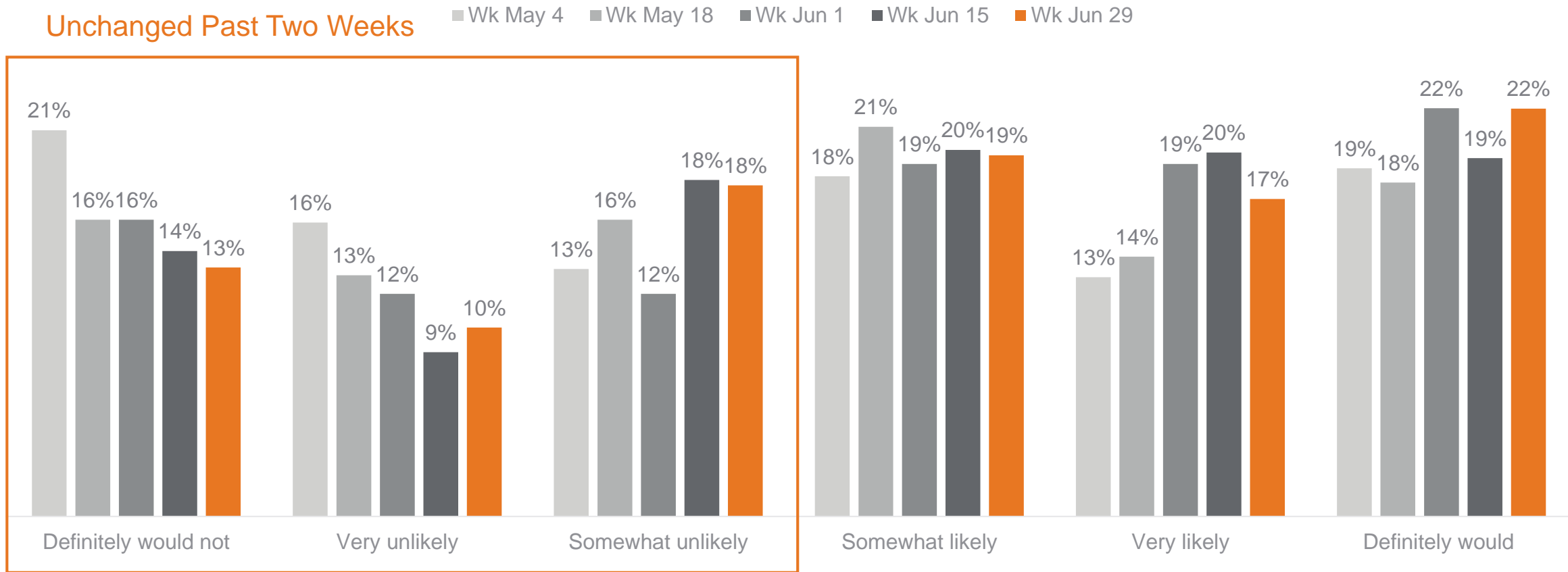
Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020





# 41% still unlikely to use a hospital for an elective procedure today

How likely are you to go to a hospital for an elective procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees?



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

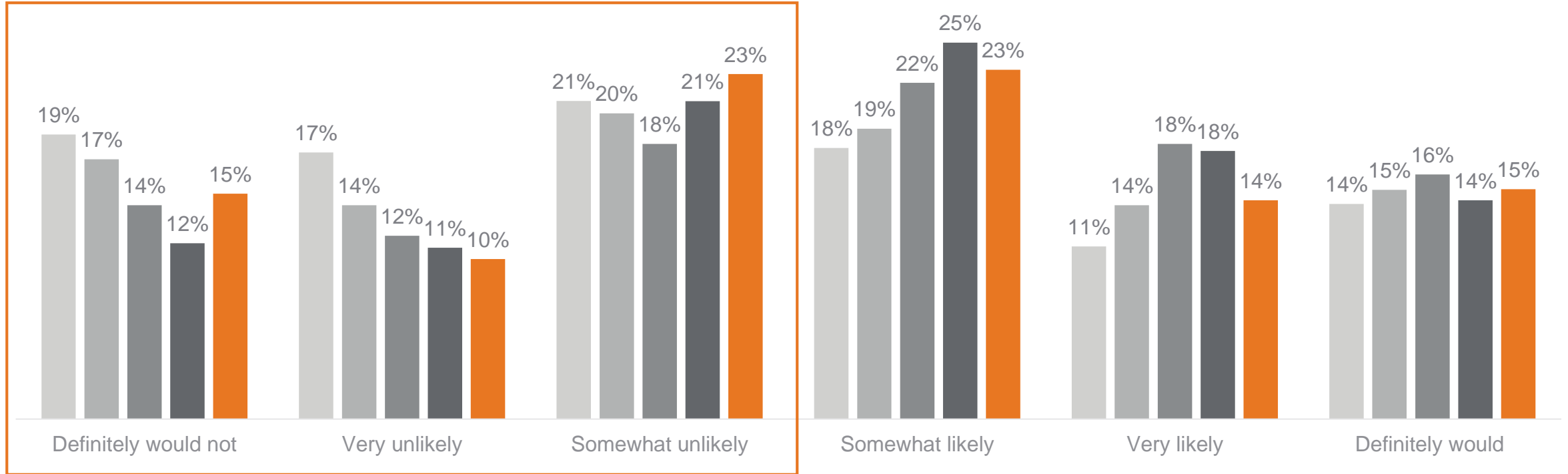


# 48% still unlikely to visit a family member in the hospital today

*If a friend or family member were in the hospital today, how likely would you be to visit them?*

■ Wk May 4   ■ Wk May 18   ■ Wk Jun 1   ■ Wk Jun 15   ■ Wk Jun 29

+4% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

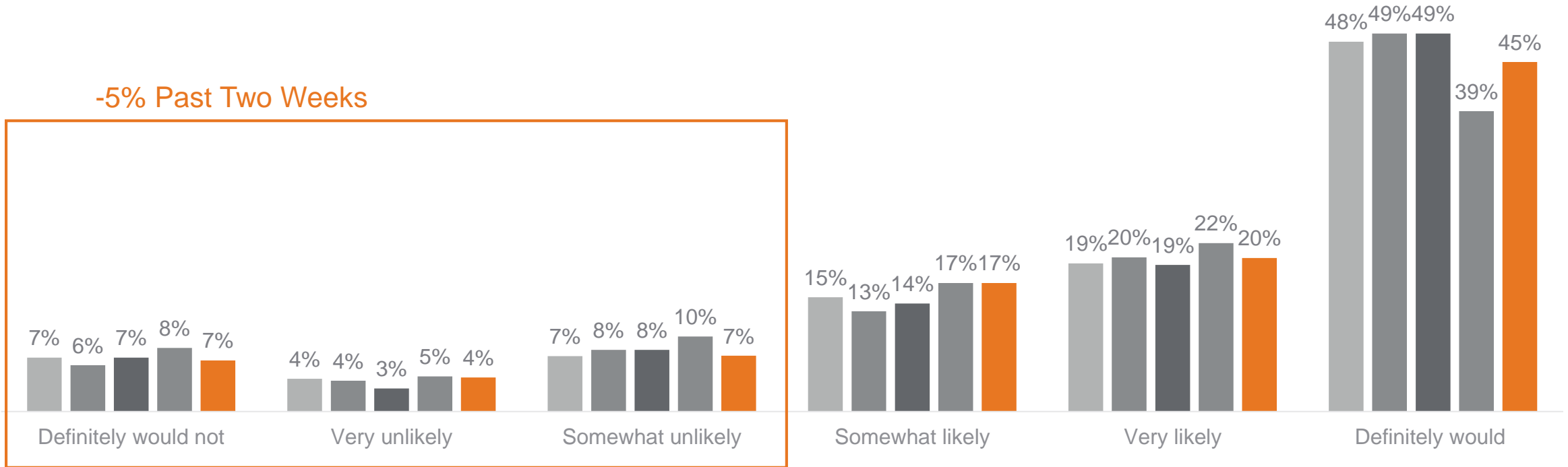


# Use of hospital emergency departments

# 18% unlikely to use an ER for a “major” illness today

How likely are you to go to a hospital emergency room if you show symptoms of a heart attack or appendicitis today?

■ Wk May 4 ■ Wk May 18 ■ Wk Jun 1 ■ Wk Jun 15 ■ Wk Jun 29



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020



# Use of outpatient and freestanding centers

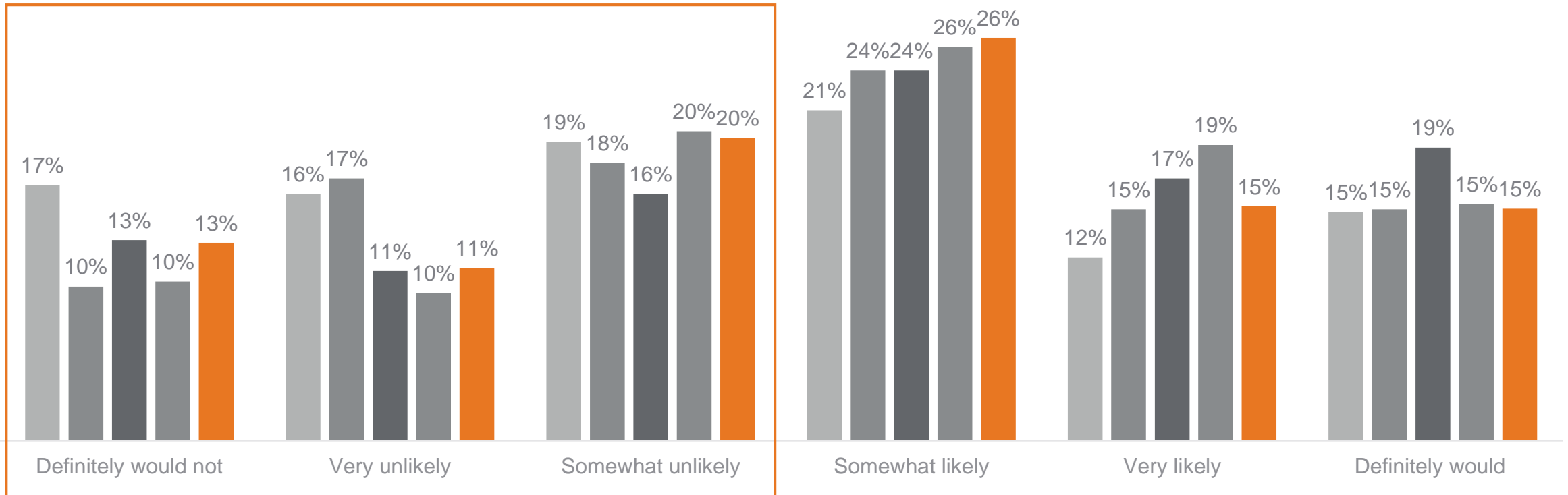


# 44% remain unlikely to use an urgent care center today

How likely are you to go to an urgent care center or other freestanding medical facility for a minor illness or injury if you needed to go today?

■ Wk May 4 ■ Wk May 18 ■ Wk Jun 1 ■ Wk Jun 15 ■ Wk Jun 29

+4% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020



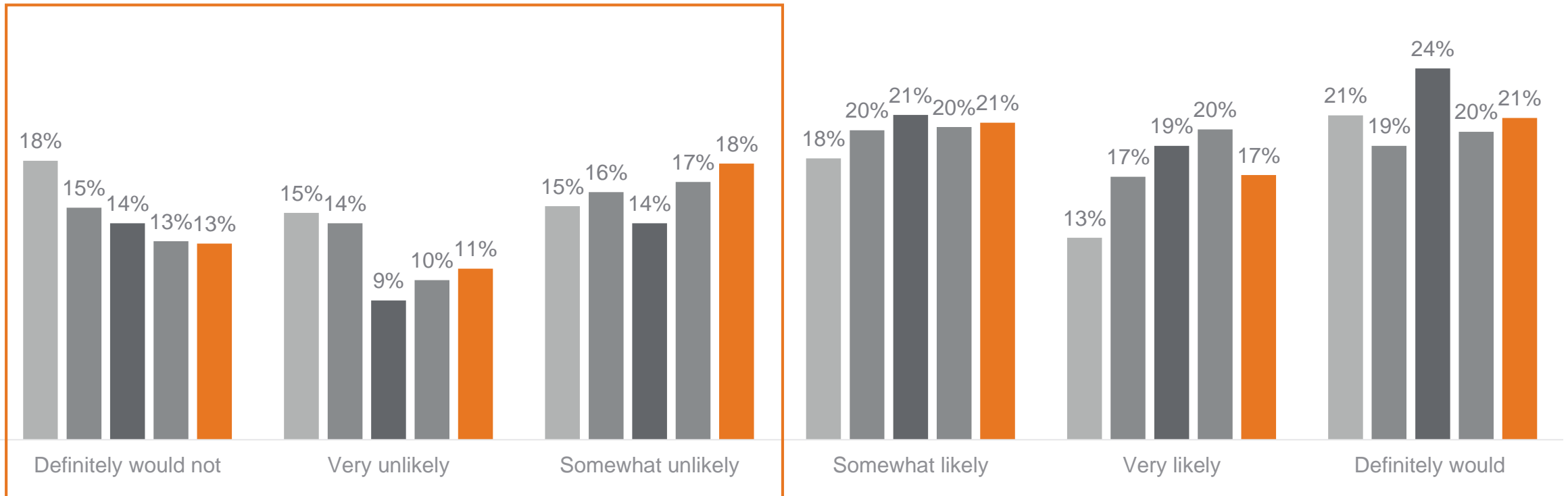


# 42% still unlikely to use an outpatient facility today

How likely are you to go to an outpatient facility for an elective outpatient procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees?

■ Wk May 4 ■ Wk May 18 ■ Wk Jun 1 ■ Wk Jun 15 ■ Wk Jun 29

+2% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020



# Use of physician practices

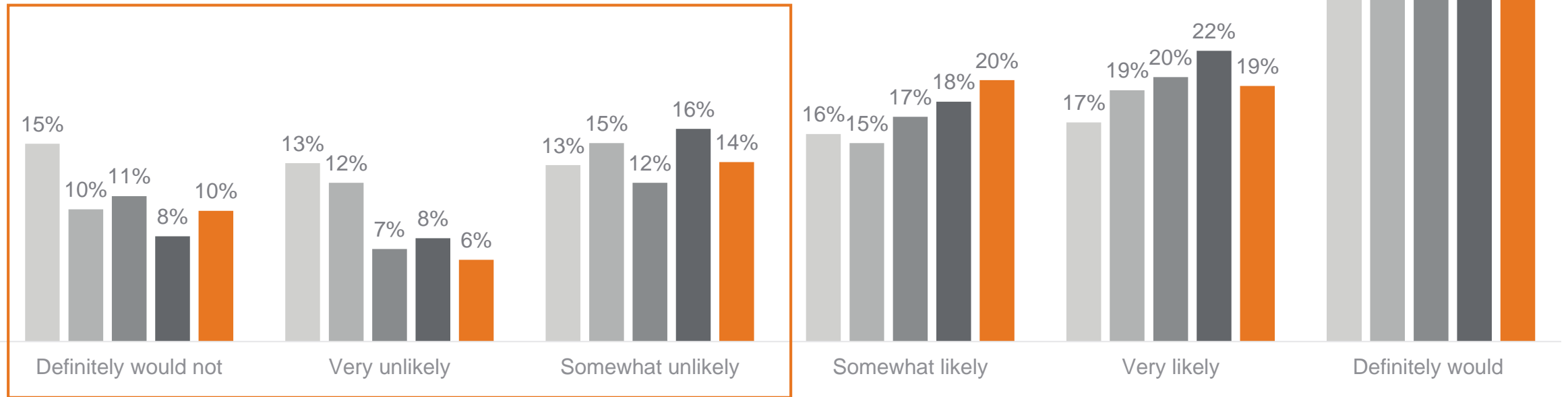


# 30% remain unlikely to see a doctor today

How likely are you to go to an appointment with your doctor today, if it was already scheduled and there were no cancellation fees?

■ Wk May 4   ■ Wk May 18   ■ Wk Jun 1   ■ Wk Jun 15   ■ Wk Jun 29

-2% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020

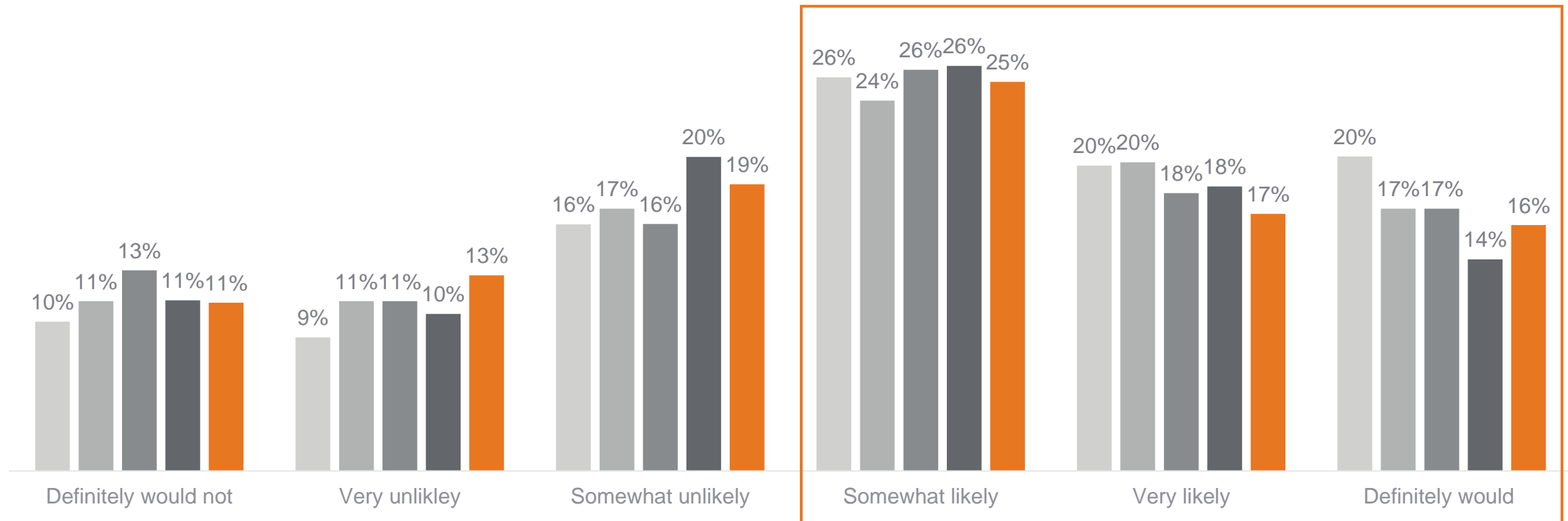


# 58% still prefer to use telehealth instead of in-person today

If you had an in-person visit scheduled with a doctor today, how likely are you to use telehealth or a virtual care service instead to avoid going to a doctor's office?

■ Wk May 4   ■ Wk May 18   ■ Wk Jun 1   ■ Wk Jun 15   ■ Wk Jun 29

*Unchanged Past Two Weeks*



Source: Optum Consumer Pulse Survey, N=700, conducted 6/29-7/3, 2020



# More information and insights

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## Please stay in touch and let us know how we can help you

- ✓ Request a complete set of findings from Waves 1-5 of the Consumer Pulse Survey
- ✓ Request to be notified when Wave 6 is published (Week of July 27)
- ✓ Learn more about our **COVID Concern Index**, which incorporates individual demographic, psychographic and behavioral data combined with Optum's powerful predictive models to identify exactly which consumers are ready to engage – including requesting a free analysis of consumers and opportunities in your market.
- ✓ Learn more about how Optum **Consumer Acquisition Services** can help you target and engage consumers and turn them into loyal patients.



For more information on any of the offerings above, contact Brian Michels at [michelsb@optum.com](mailto:michelsb@optum.com)