COVID-19 Consumer Behavior

Key Findings and Takeaways from Wave 4 of the Optum Consumer Pulse Survey

June 30, 2020

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Overview of the Optum COVID-19 Concern Index

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 1-4 of a six-part research series that began May 4. Upcoming surveys are being conducted the weeks of June 29 and July 13.
- 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

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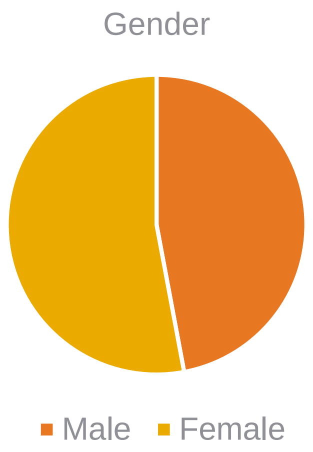
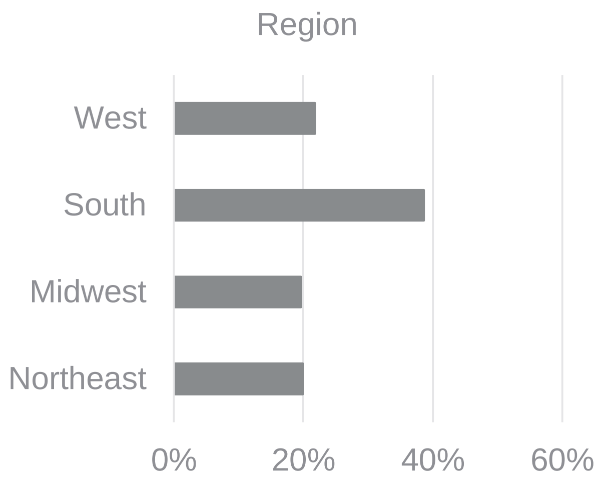
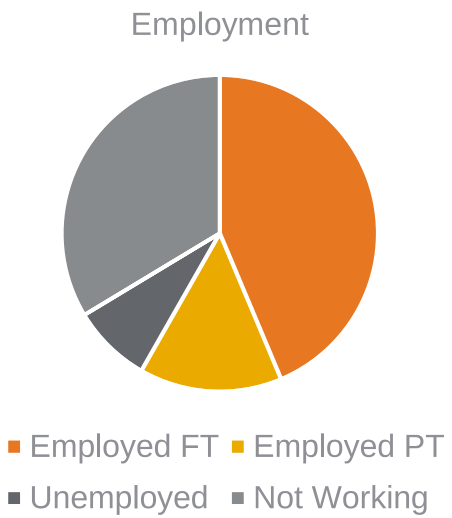
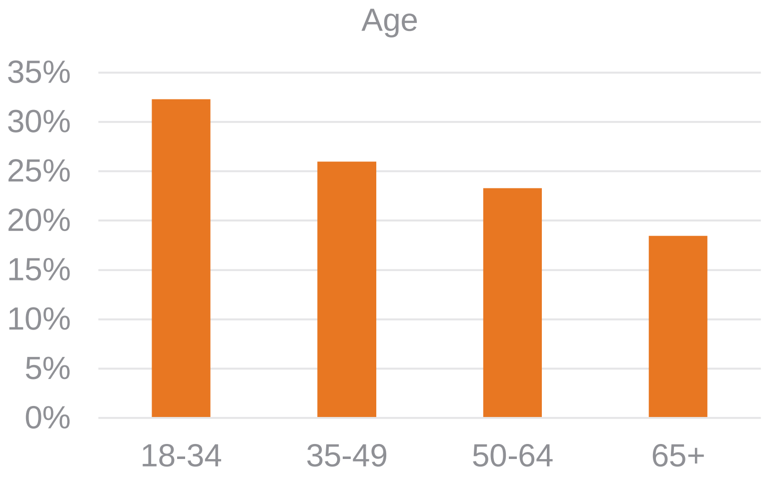
Consumer Pulse Survey respondent profile

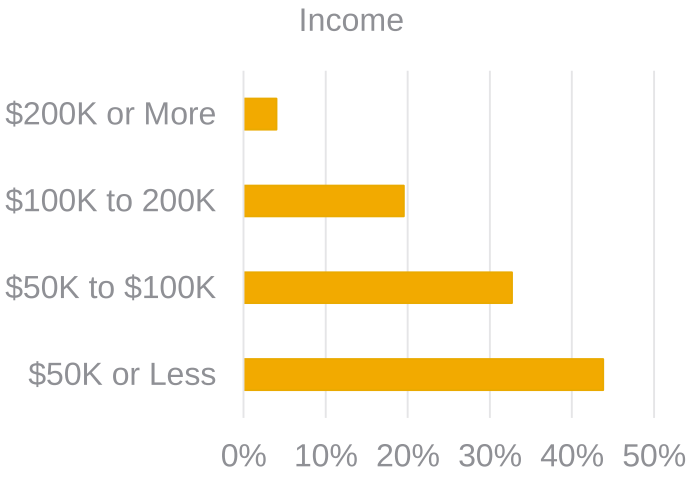
Summary of Wave 4 (June 15-19) respondent profiles. Organized for ease of use. N = 700 and MOE of +/- 4%











Key findings and takeaways

While consumer sentiment toward seeking care continues to trend positively overall; we may be seeing the early signs of slowing or a shift backwards.

- Overall, the number of **consumers who are likely to reschedule or postpone a medical procedure in a hospital (*still one out of two*), has dropped to a six week low of 53%** – down from 61% two weeks ago.
- And as a result, our **"Consumers Likely to Postpone Hospital Care" Curve continued to flatten** as fewer consumers say they are likely to postpone a hospital procedure today.
- However, we did see **declines among those consumers who say they "Definitely Would" (top box score) see a provider today** across all scenarios: Hospitals (down 3%), Urgent Care (down 4%), Outpatient (down 4%), Physicians (down 5%) and Hospital ER for a serious illness (down 10%).

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Key findings and takeaways CONTINUED

A growing number of consumers – in particular those who are unemployed – would avoid emergency care today, even for life threatening symptoms.

- The number of consumers who say they would **likely avoid the ED despite showing signs of a heart attack or appendicitis rose to 23%** – a six point increase over two weeks ago.
- Even more significantly, **almost one in two (47%) consumers who are unemployed would avoid the ED** even for life threatening symptoms. This is up from 27% two weeks ago.
- The number of **consumers who would use an urgent care center or other freestanding medical center for a minor illness or injury remained unchanged at 60%**.

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Key findings and takeaways CONTINUED

The number of consumers willing to seek care in a physician's office today dropped slightly, with the largest drop occurring among the unemployed.

- The number of consumers who are **likely to keep a previously scheduled doctor's appointment dropped slightly to 68%** (down from 70% two weeks ago).
- Perhaps most startling is that **the number of unemployed consumers who say they would seek care at their physicians office today dropped from 60% two weeks ago to just 40% today**.
- We also continue to see **differences by gender and age** – with 88% of males 65+ likely to see a physician, but just 68% of females 65+ likely to do so today.
- The total number of consumers who **would prefer to use a virtual platform** like telehealth to see their physician dropped slightly to 58%, but remains high among consumers in the Northeast, women and higher income households.

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Key findings and takeaways CONTINUED

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

- In a new survey question asking consumers how much more important healthcare brands are as a result of COVID, we learn that **37% say brands are more important while just 8% say they are less important**.
- While no real differences exist between males and females, younger consumers are most likely to say brand importance has grown. **46% of consumers ages 18-34 and 41% of those ages 35-49 say brands are somewhat or much more important**.
- Slight regional differences exist with **more consumers in the South (41%) and Northeast (39%) saying brands are more important** than consumers in the West (33%) and Midwest (31%).

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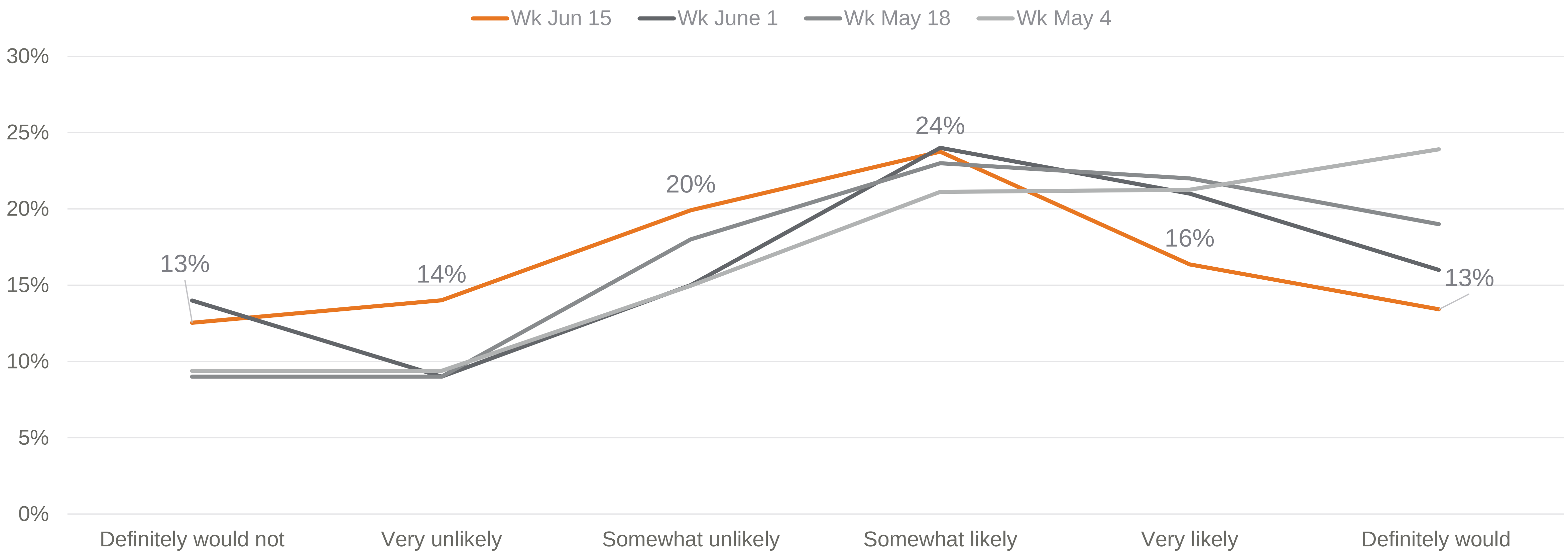
Consumers Likely to Postpone Care Curve Continues Flattening

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 June 15-19, 2020

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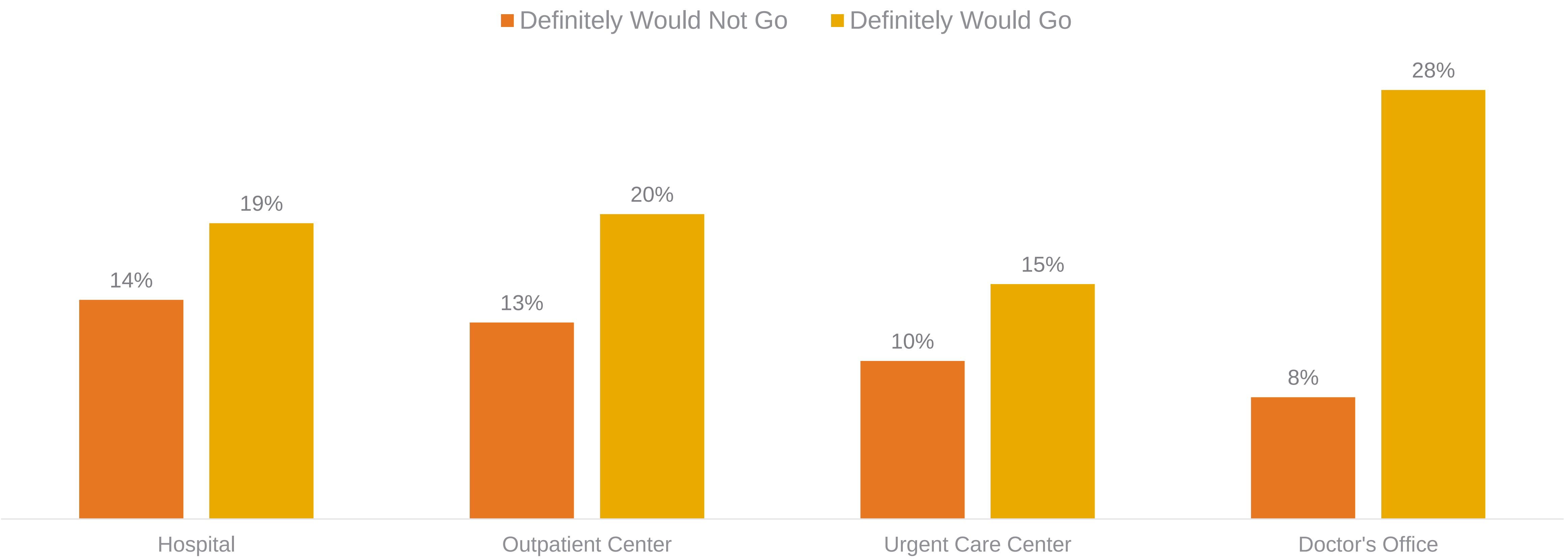
Consumers Still Most Likely to Visit a Physician vs. Hospital Today

*Wave 3 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 June 15-19, 2020

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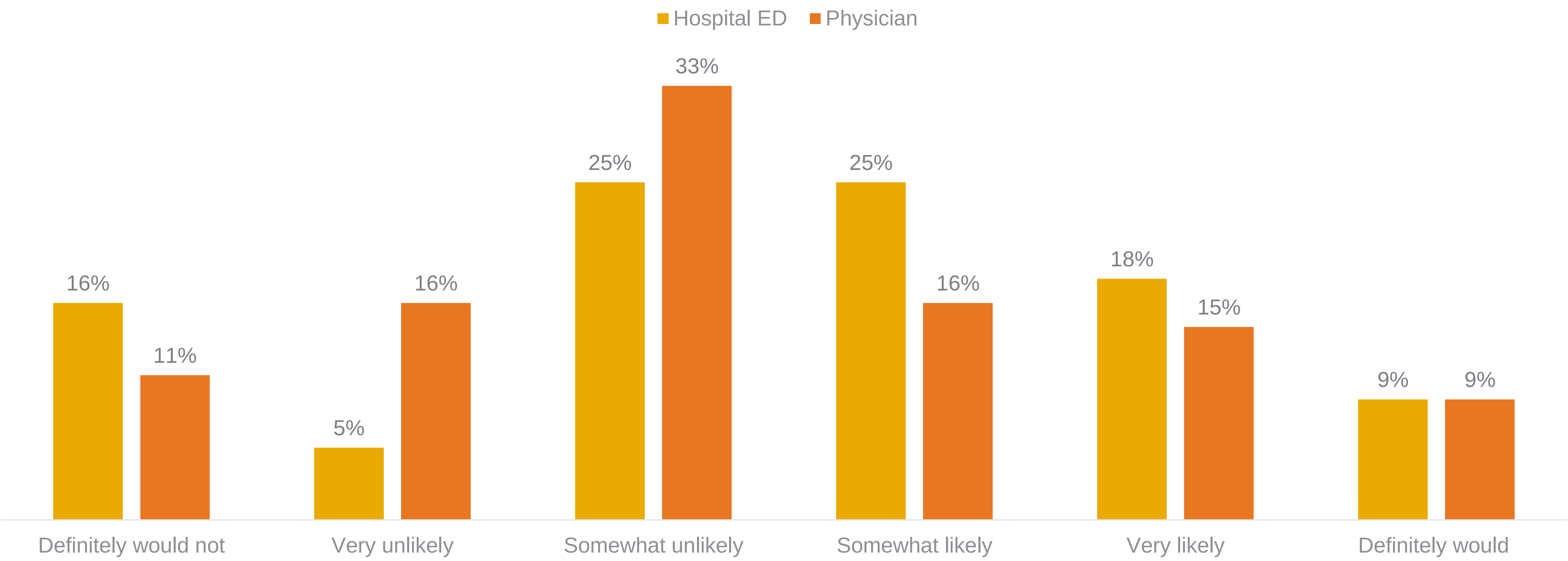
Unemployed Consumers More Likely to Avoid Care

Likelihood to seek care from the following providers among those respondents who report they are ***unemployed and seeking employment.***



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 2020

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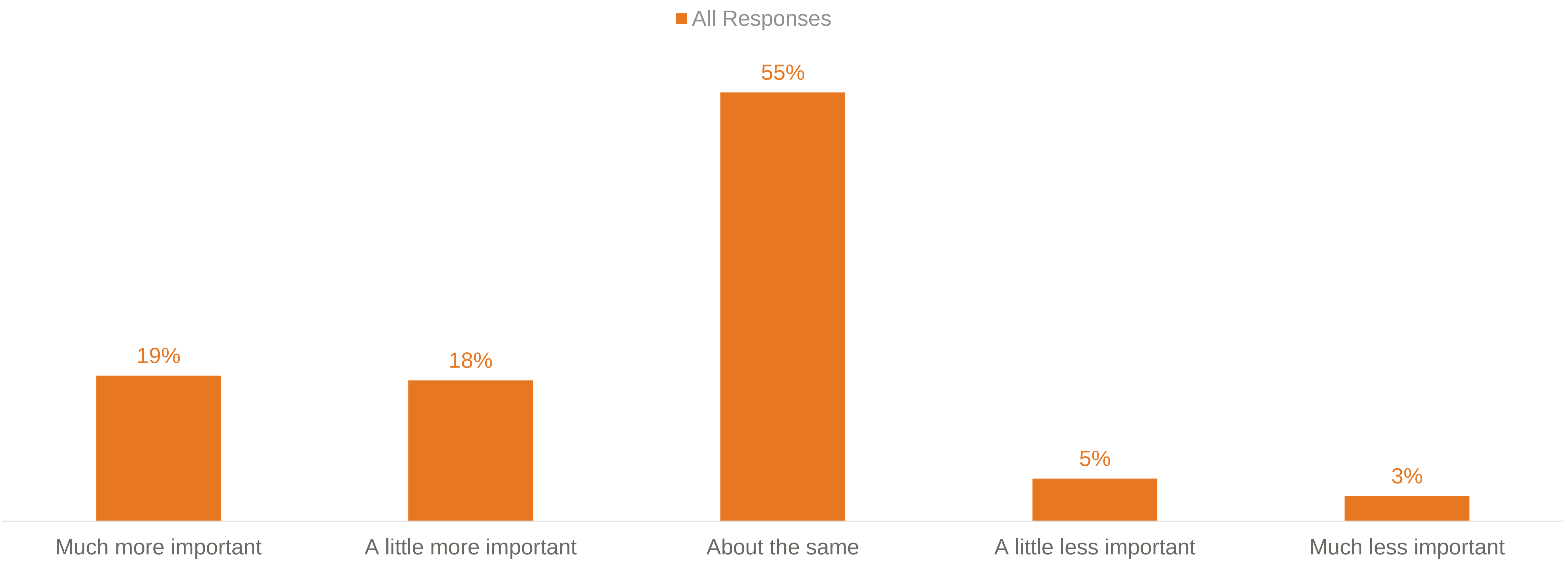
More Than One in Three View Brands As More Important Today

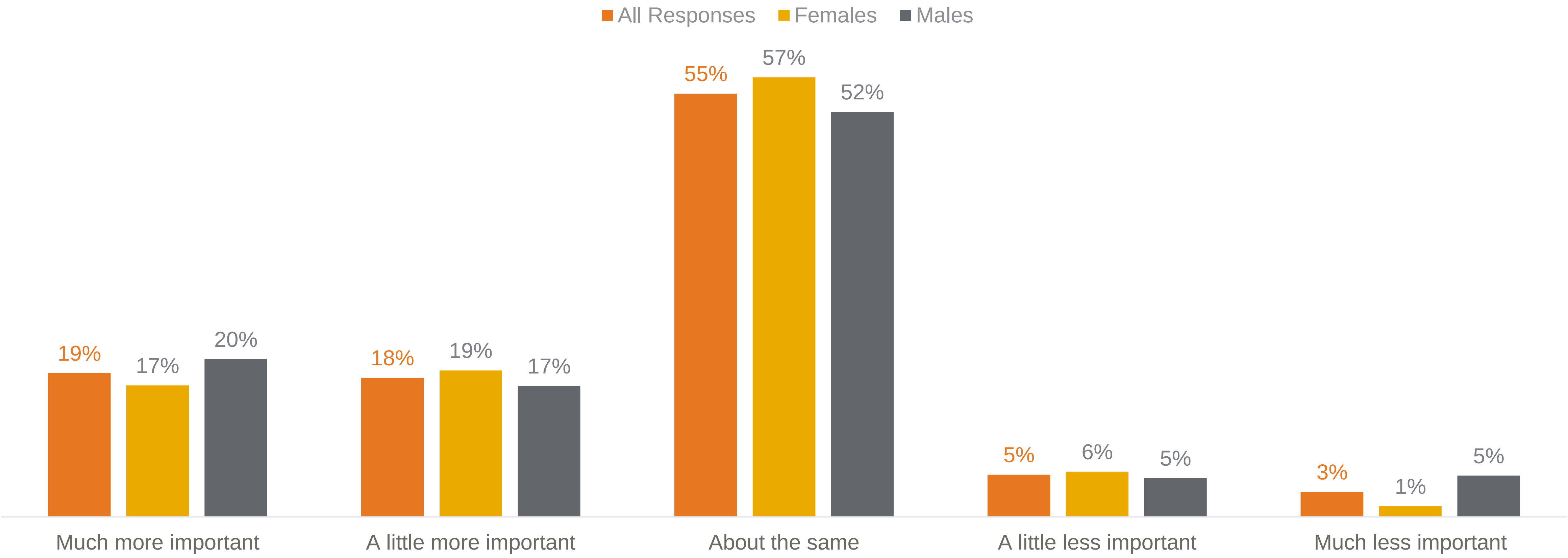
How much more important to you is the brand name/reputation of your health care provider now, in comparison to before the COVID outbreak?



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 2020

While Males and Females View Brand Importance Similarly…

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 June 15-19, 2020

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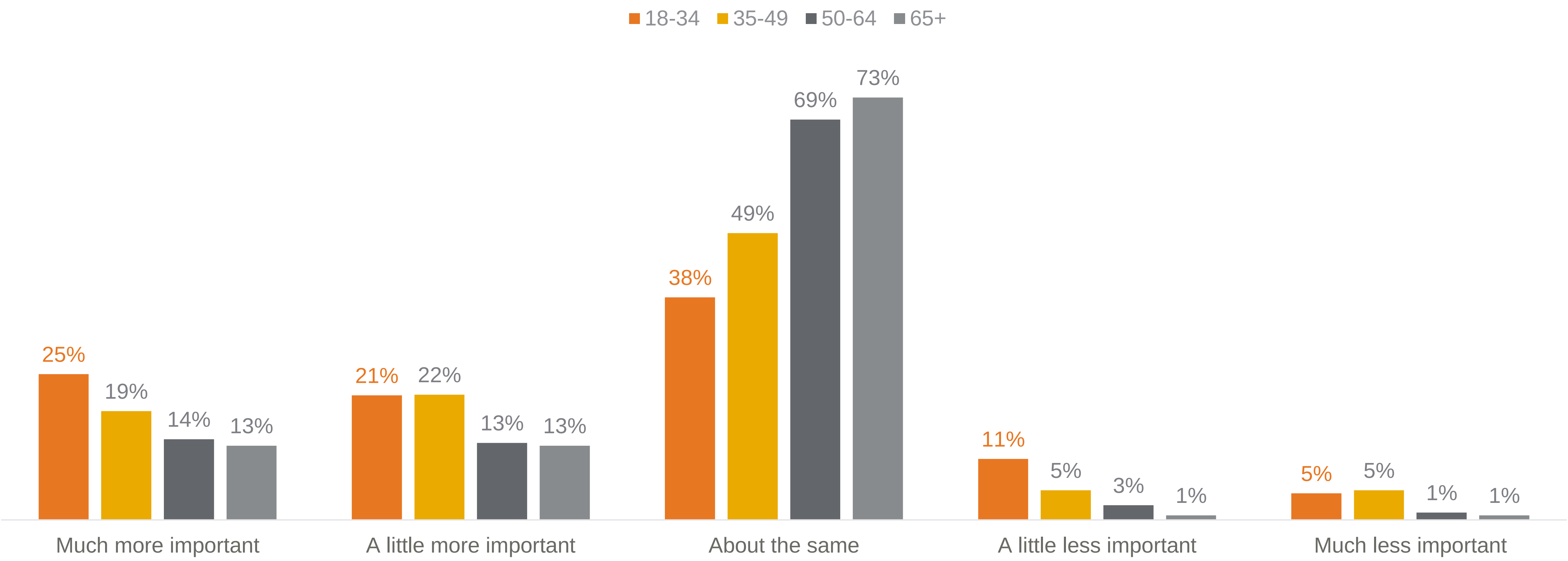
… Younger Consumers Feel Brands Are More Important Today

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 June 15-19, 2020

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Use of hospitals and health systems

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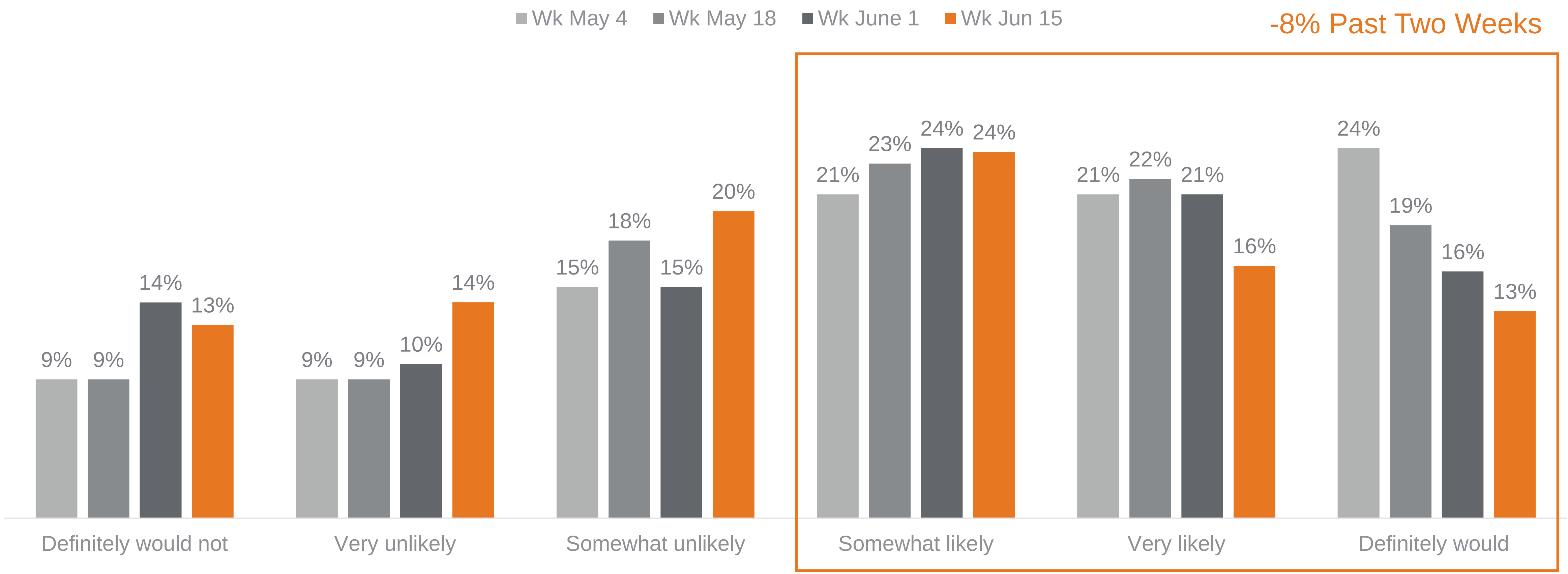
53% still likely to postpone hospital care today

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 June 15-19, 2020

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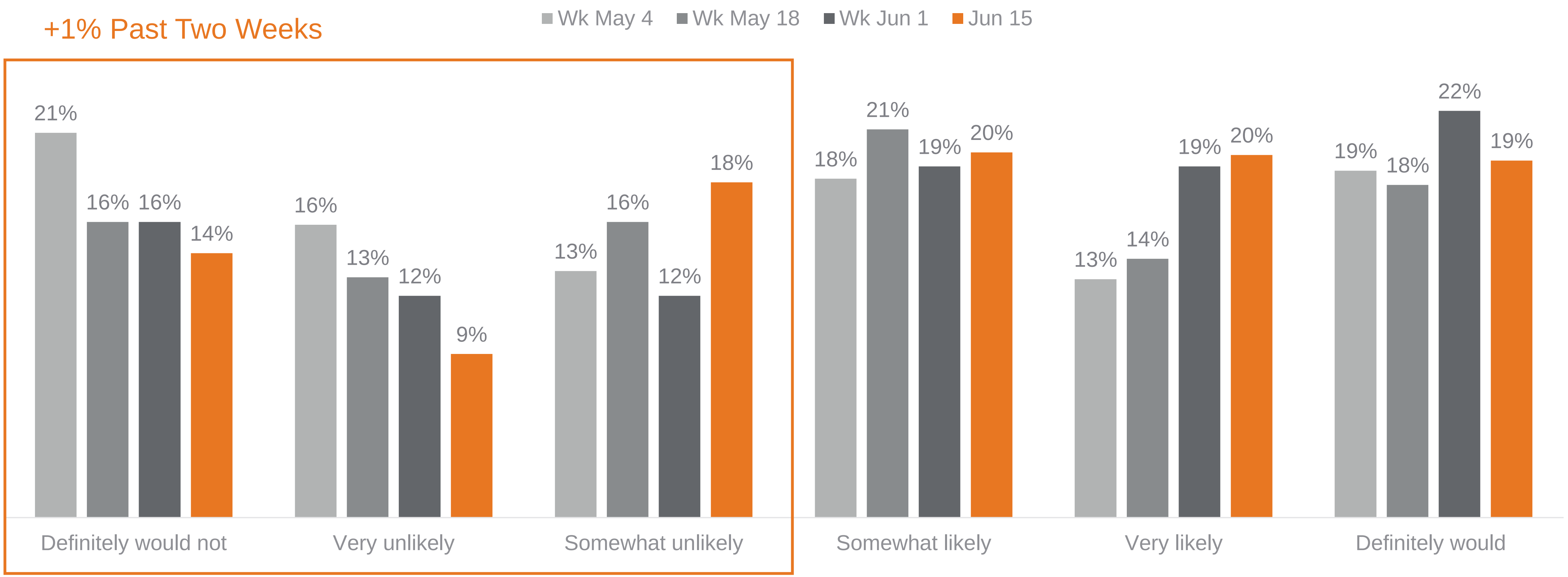
41% still unlikely to use a hospital for an elective procedure today

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 June 15-19, 2020

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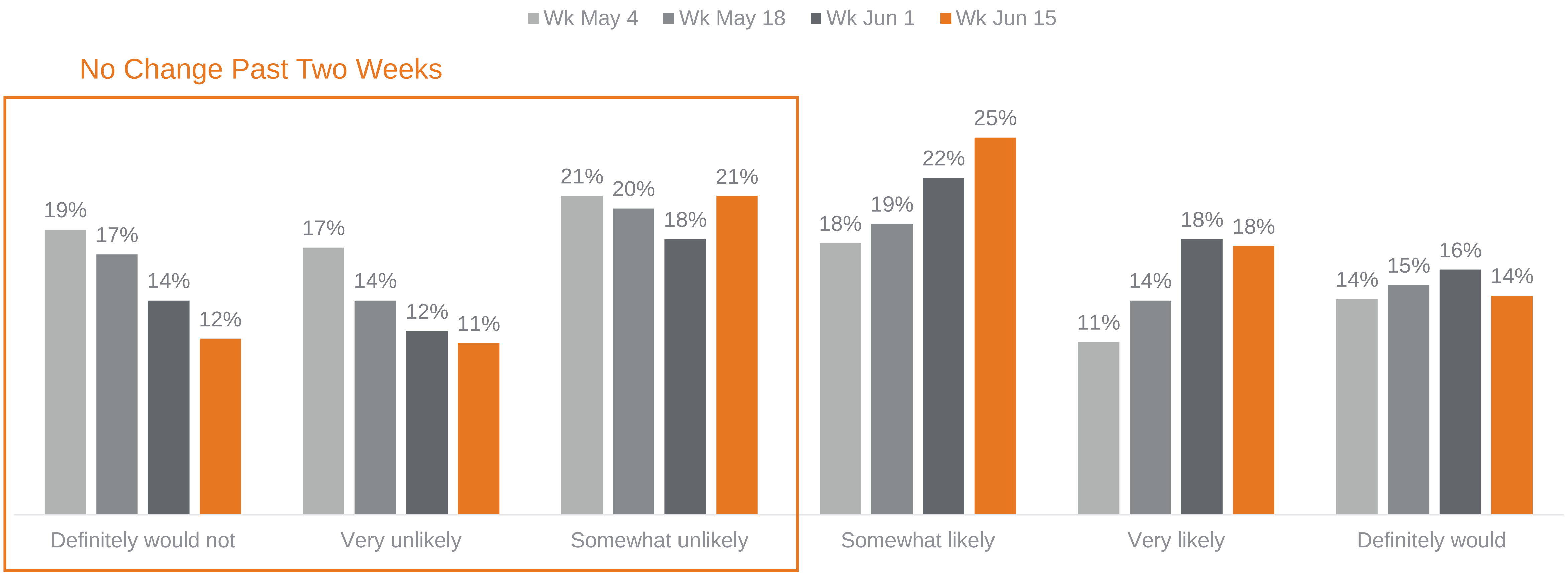
44% still unlikely to visit a family member in the hospital today

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



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 2020

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Use of hospital emergency departments

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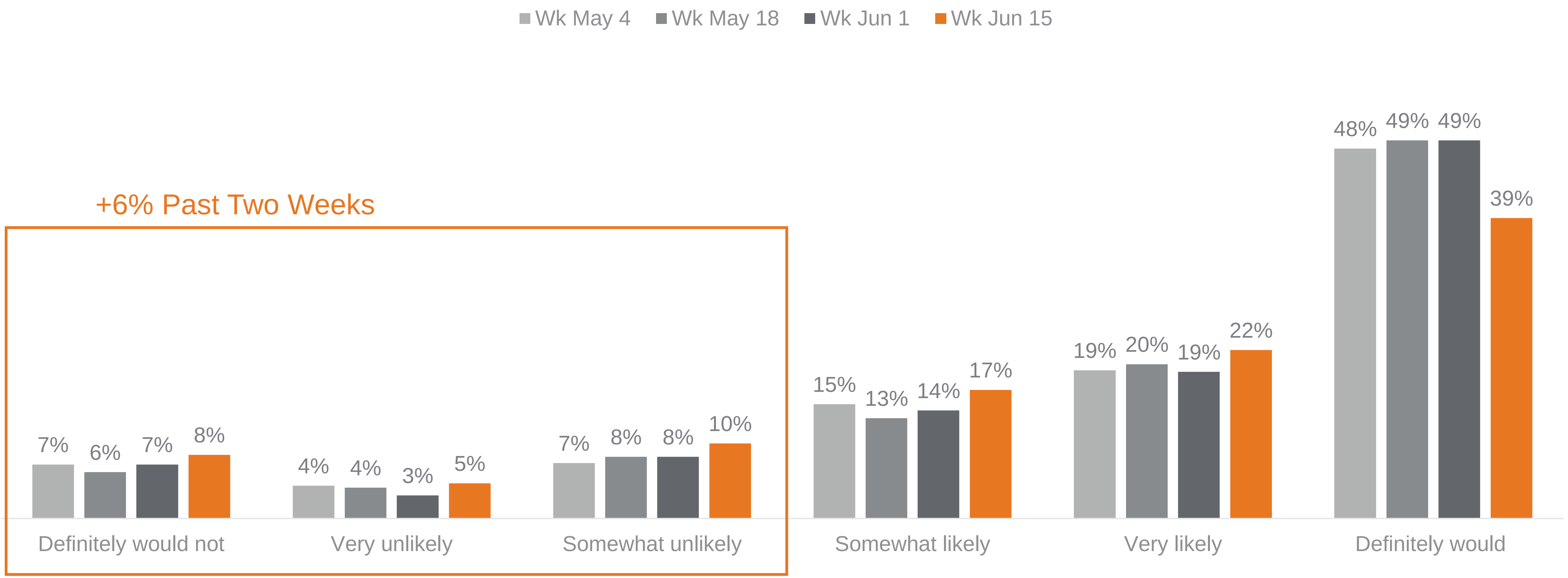
23% now unlikely to use an ER for a “major” illness today

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



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 2020

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Use of outpatient and freestanding centers

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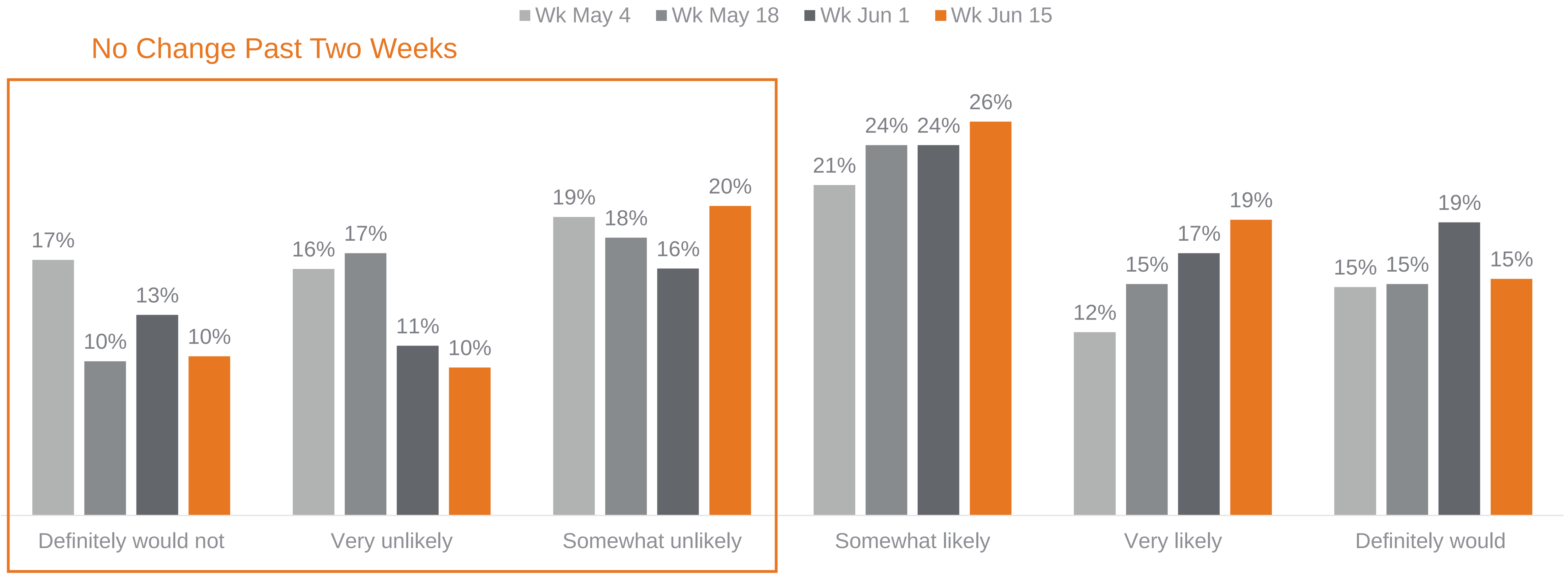
40% remain unlikely to use an urgent care center today

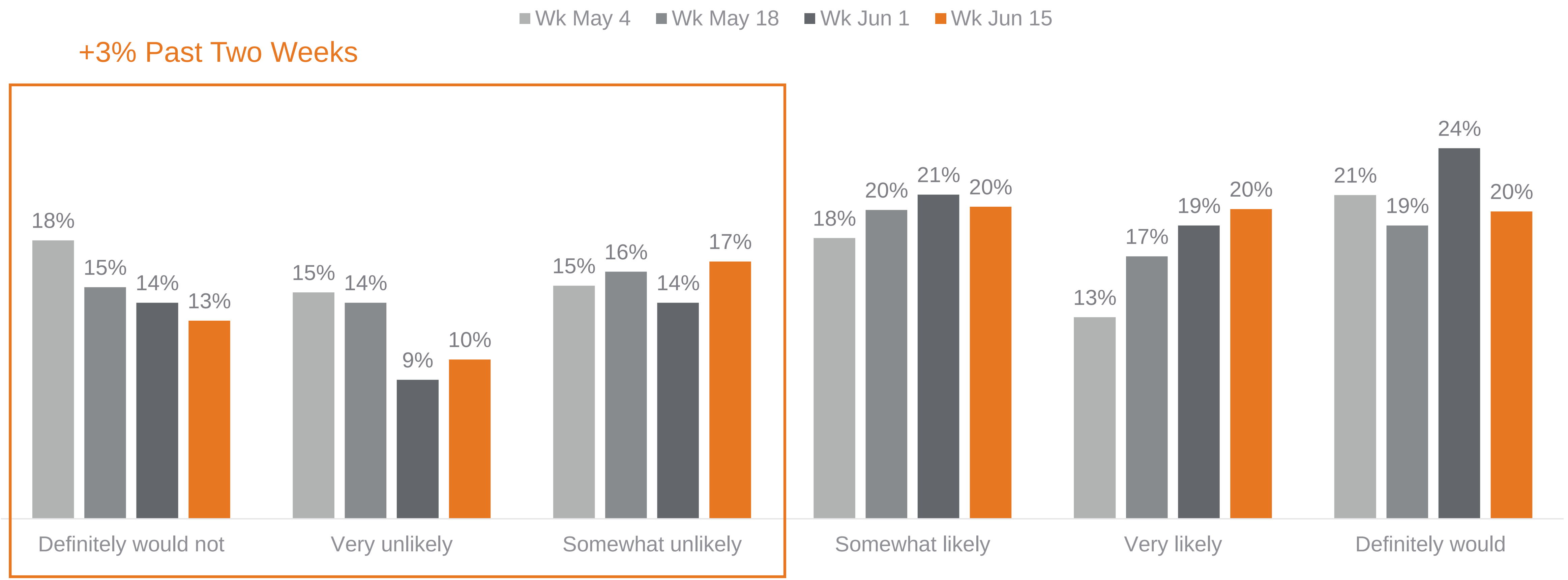
How likely are you to go to an urgent care center or other freestanding medical facility for a minor illness or injury if you needed to go today?



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 2020

40% 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?



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 2020

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Use of physician practices

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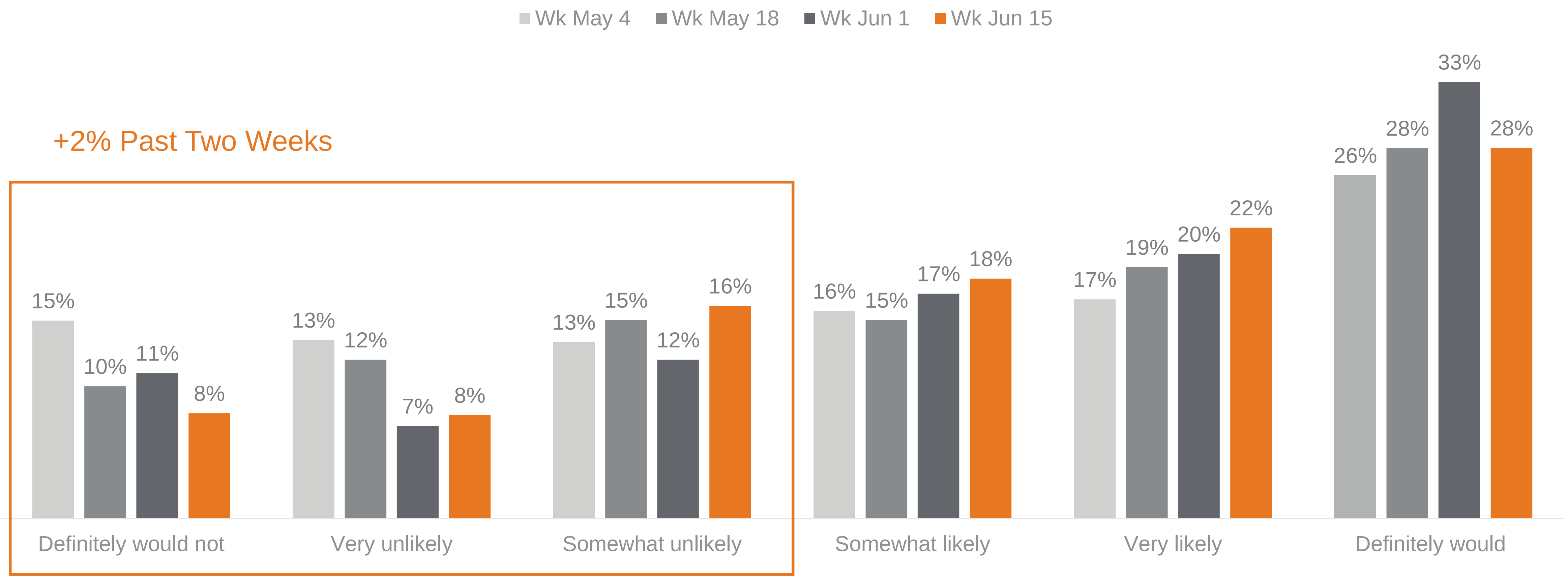
32% remain unlikely to see a doctor today

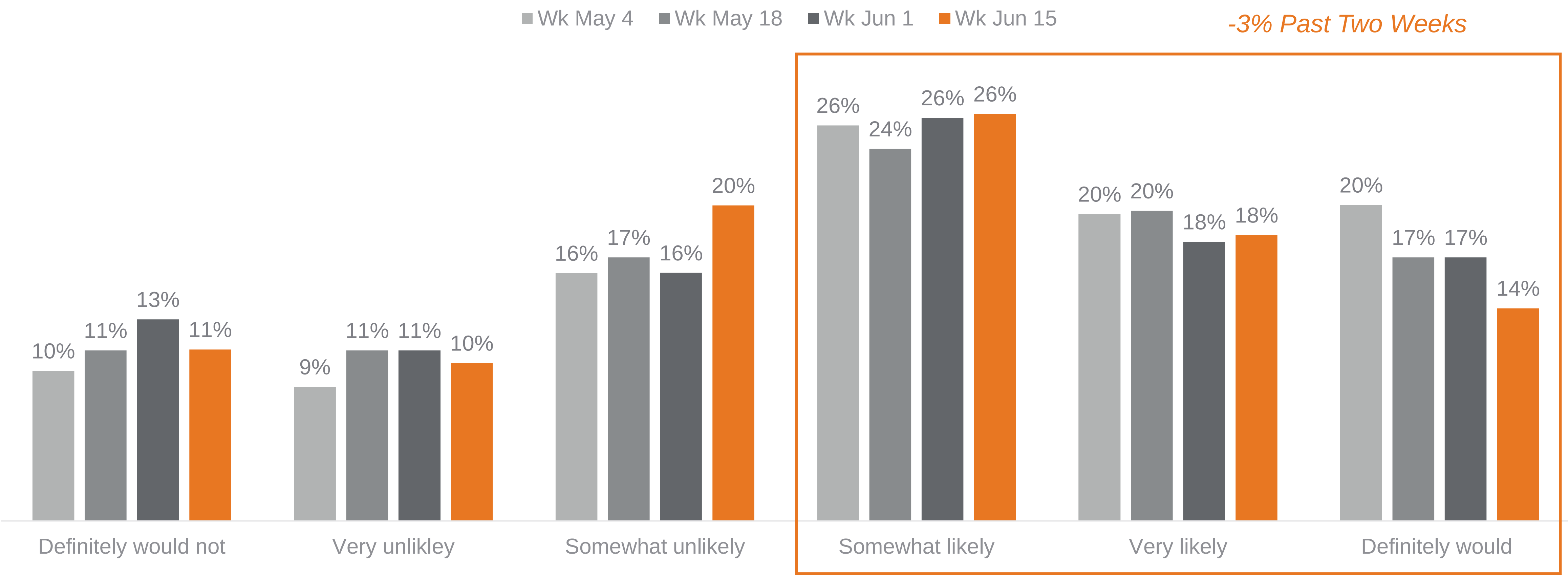
How likely are you to go to an appointment with your doctor today, if it was already scheduled and there were no cancellation fees?



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 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?



Source: Optum Consumer Pulse Survey, N=700, conducted June 15-19, 2020

More Information and Insights

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

- ✓ Request a complete set of findings from Waves 1-4 of the Consumer Pulse Survey
- ✓ Request to be notified when Wave 5 is published (Week of July 13)
- ✓ 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