



COVID-19 Consumer Behavior

Key Findings and Takeaways from Wave 6 of the Optum Consumer Pulse Survey

July 31, 2020



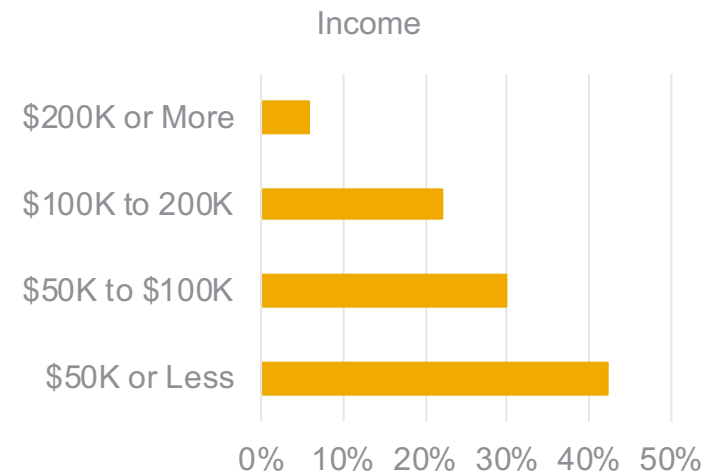
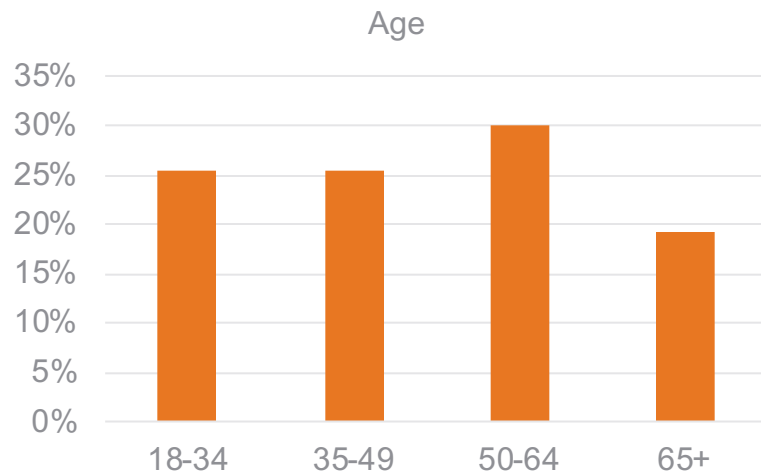
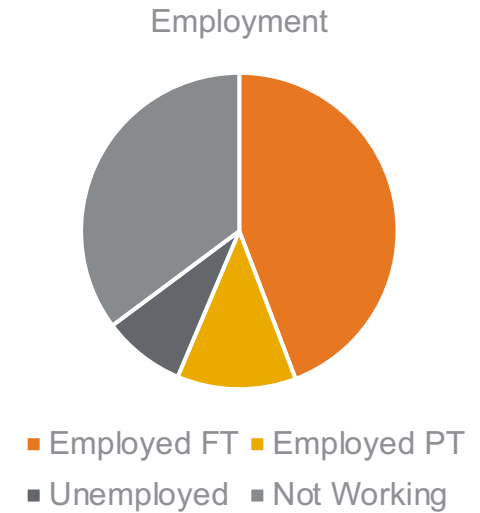
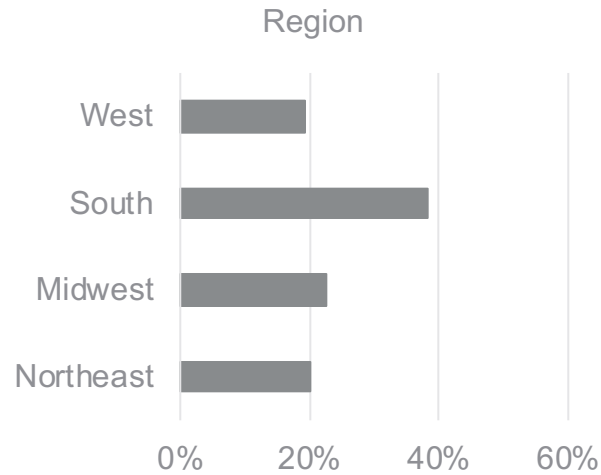
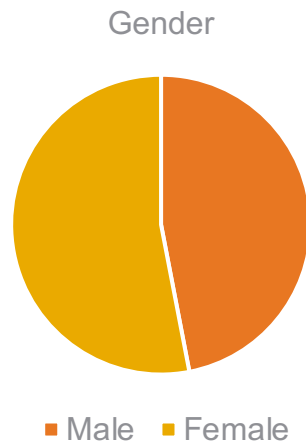
Overview of the Optum Consumer Pulse Survey

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 1-6 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

Consumer Pulse Survey respondent profile

Summary of Wave 6 (7/13 - 7/17) respondent profiles. Organized for ease of use. N = 700 and MOE of +/- 4%



Key findings and takeaways

Consumer sentiment toward seeking care has plateaued, due in part to regional changes in the spread of the virus.

- The number of **consumers who are likely to reschedule or postpone a medical procedure in a hospital remains largely unchanged**, falling just one percentage point to 56% from our most recent wave.
- While the percentage who say they **Definitely Would postpone** dropped to 13% and those who say they **Definitely Would Not postpone** rose to 12% -- this is essentially where the survey findings stood four weeks ago.
- The percentage of consumers in the Northeast and Midwest who say they would reschedule or postpone hospital care continues to fall, while **in the West the percentage likely to postpone continued to rise and reached 36% in our latest wave.**

Key findings and takeaways CONTINUED

A majority of consumers are willing to seek care in a physician's office today, although it varies by age, and most prefer telehealth options.

- The number of **consumers who are likely to keep a previously scheduled doctor's appointment** reached a high of **74%**.
- However, **younger consumers are the least likely to see a physician** with just 41% of those 18-34 saying they are Very Likely or Definitely Would see a physician today followed by those 35-49 (44%), 50-65 (57%) and 65+ (71%).
- The percentage **consumers who would prefer to use a virtual platform like telehealth to see their physician** continues to hover around **60%**, and remains highest among younger consumers and those in the West.
- Those who are **unemployed** continue to rank highest in likelihood to **postpone and avoid care** at all levels including physicians and hospitals.

Key findings and takeaways CONTINUED

The likelihood that some consumers will put off emergency care – even for a serious condition – continues to be a possibility.

- Among all consumers, **one in five (20%) continue to say they are likely to avoid the ED even for a serious condition** such as a heart attack or an appendicitis. This has essentially remained unchanged since we began the survey in early May.
- **Among consumers who are unemployed (approximately 8 percent of our respondents), this percentage jumps to almost one in three (30%)** who say they are likely to avoid the ED even for a serious condition.
- And **other groups appear at risk as well**; including 26% of consumers in the South and 34% those ages 18-24 who say they may avoid the ED even for a life threatening symptom or illness.

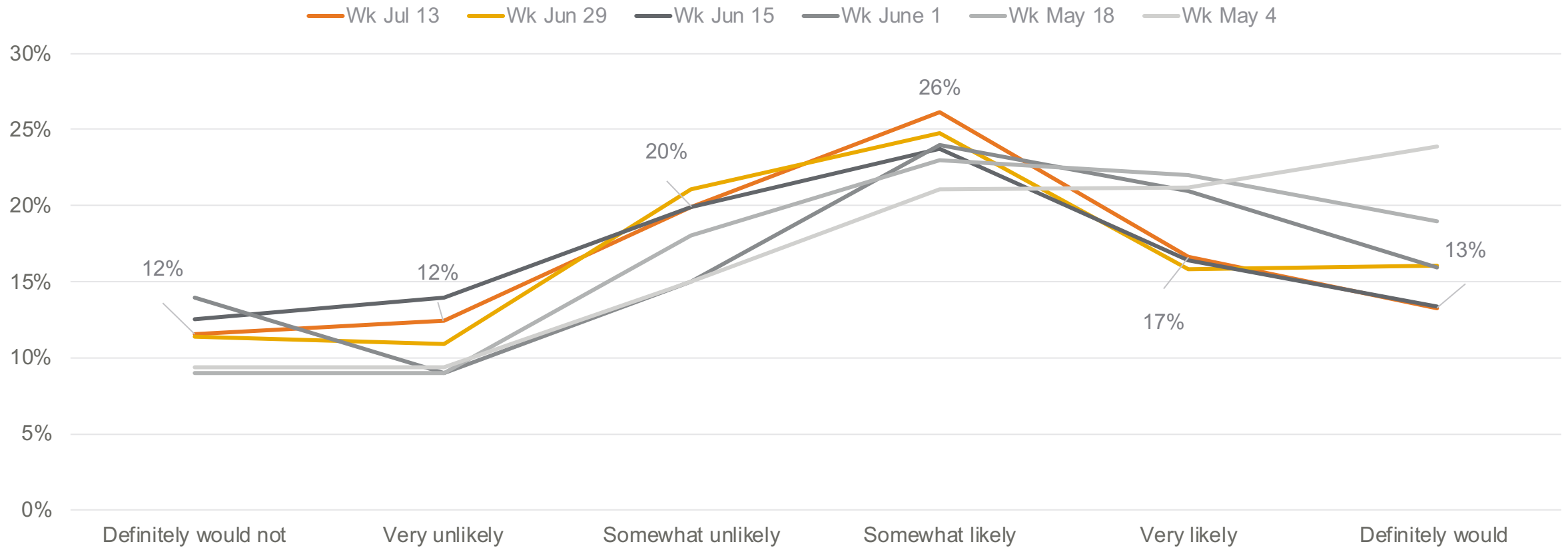
Key findings and takeaways CONTINUED

Healthcare brands remain important for almost all consumers and especially younger consumers, and one in three say they are even more important.

- In our newest survey question asking consumers how much more important healthcare brands are as a result of COVID, we find **34% believe brands are more important while just 8% say they are less important.**
- Younger consumers are most likely to say brand importance has grown with **45% of consumers ages 18-34 saying brands are Somewhat or Much More important.**
- **Hispanics and consumers in the Northeast** are also more likely to say that healthcare brands are more important today.

“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?

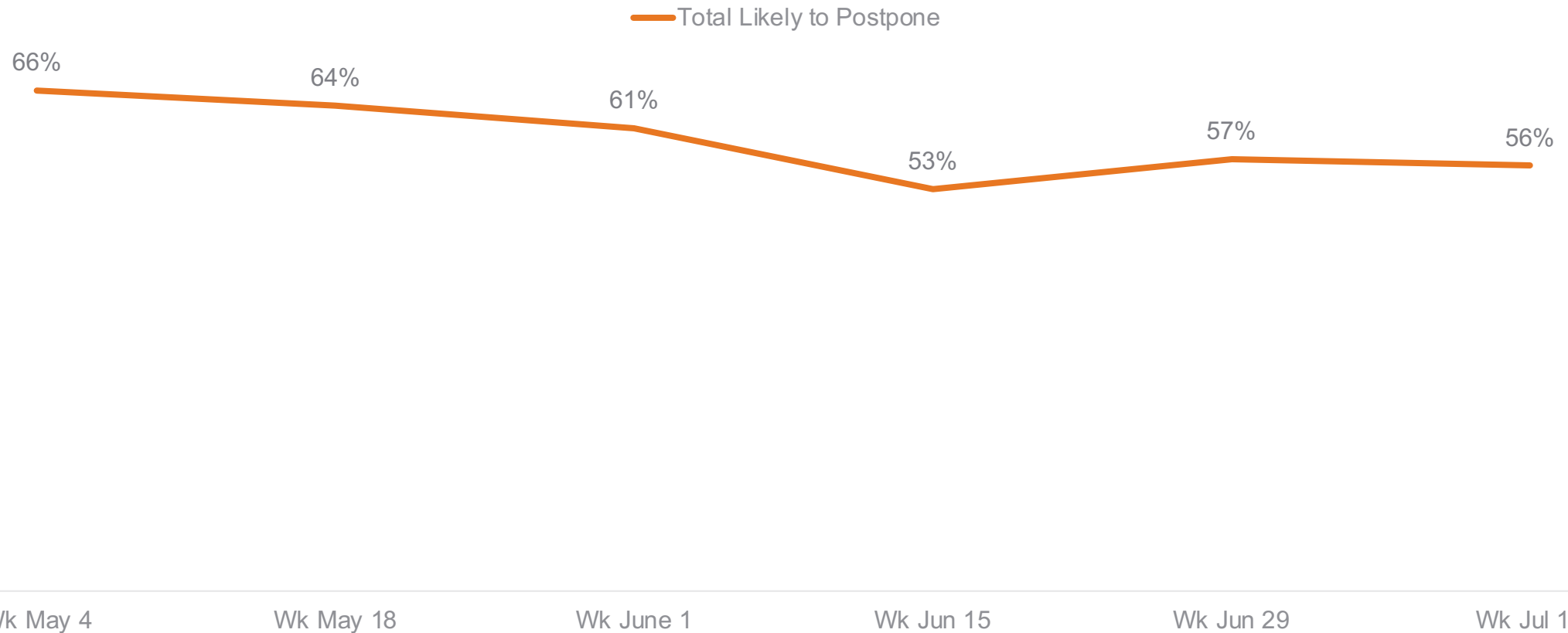


Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020



Over half (56%) of consumers still likely to postpone hospital care

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? **Somewhat, Very and Definitely Would Combined by Survey Week**

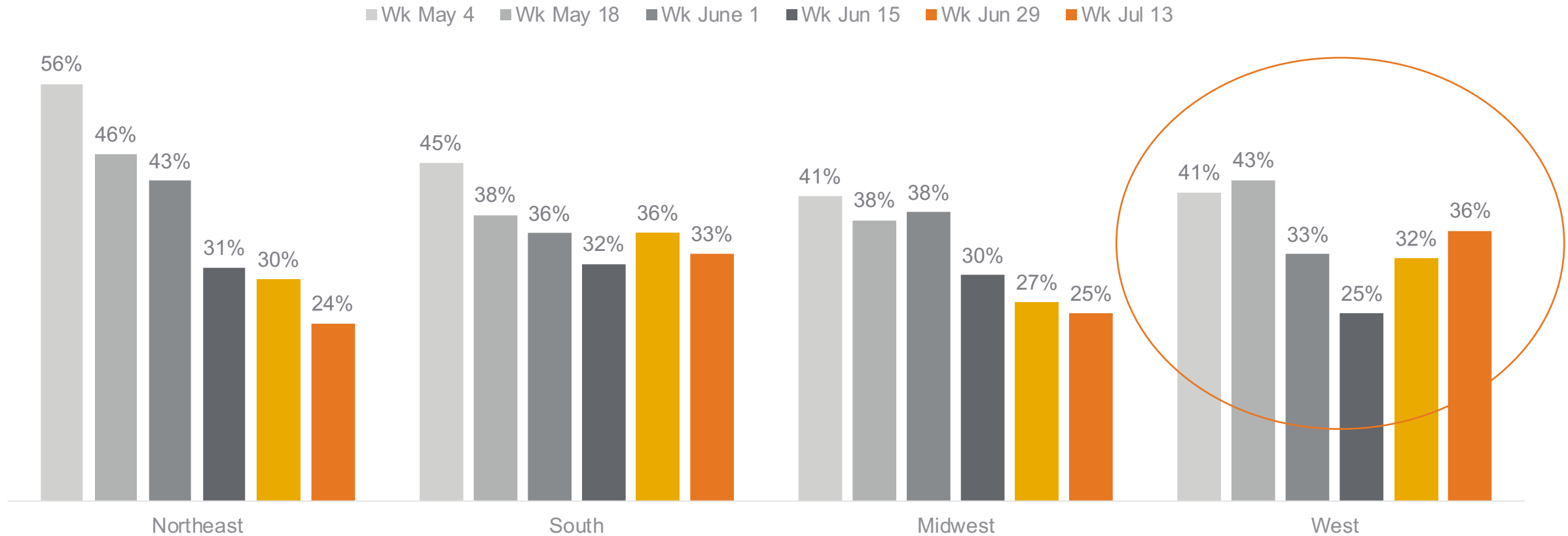


Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020



Regional differences continue 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 by Region***

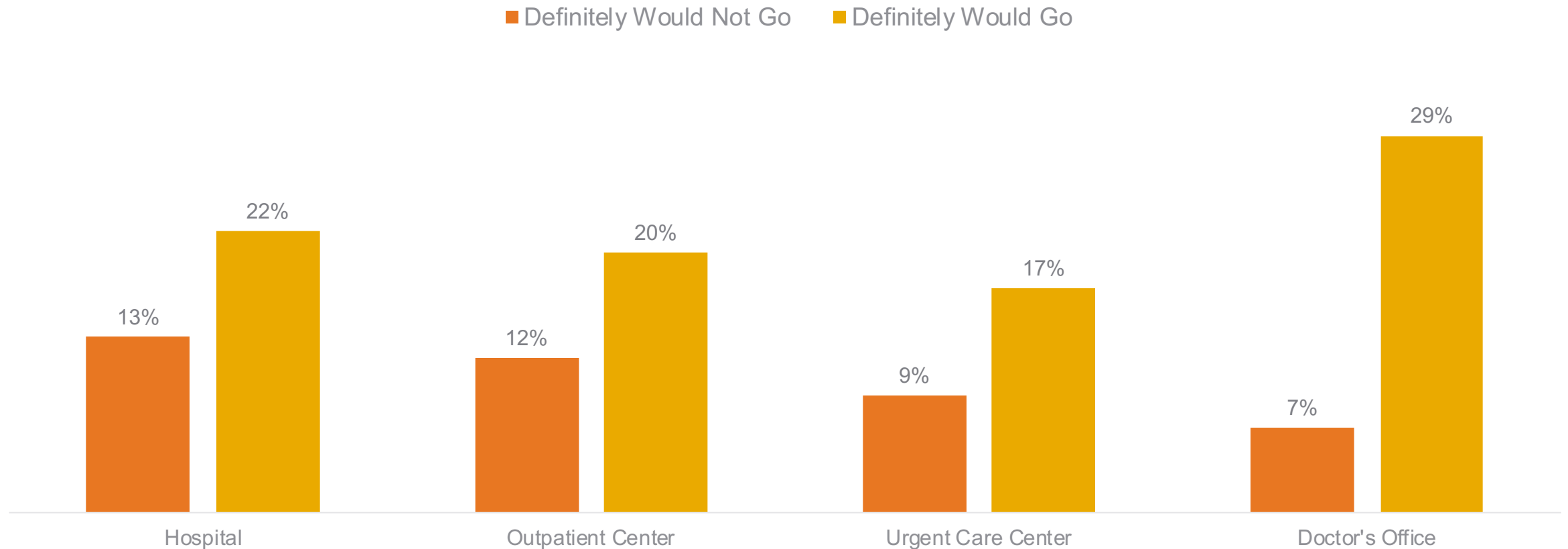


Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020



Consumers are still most likely to visit physician offices

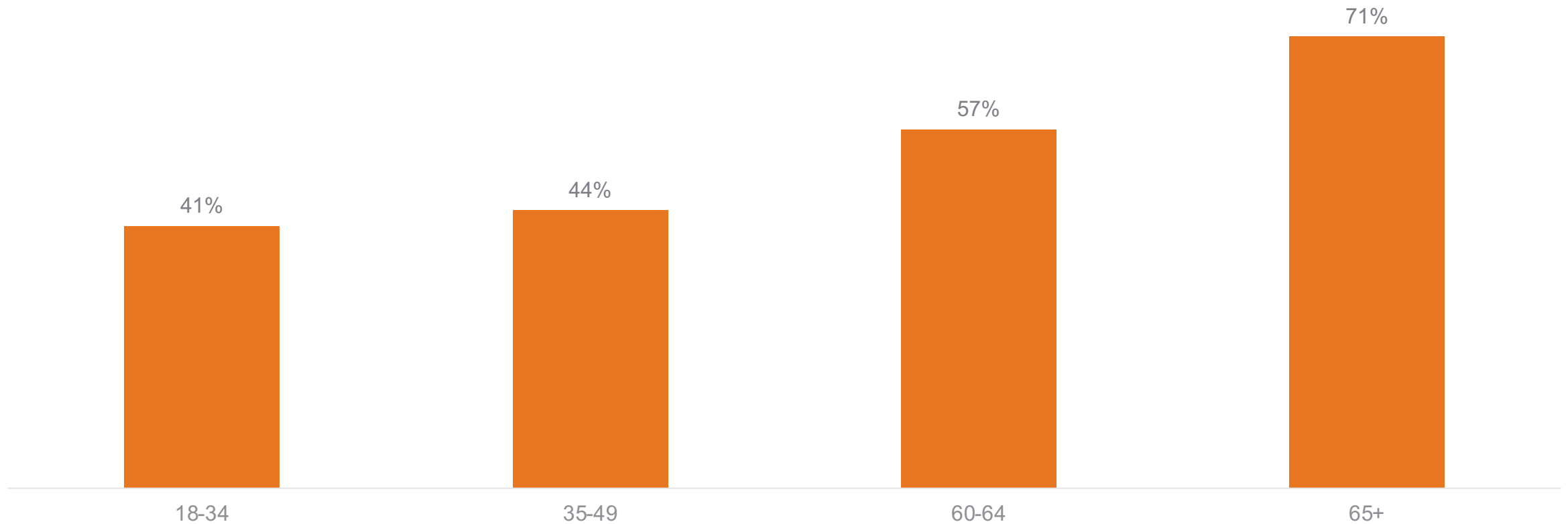
Wave 5 Top Box Scores: Summary findings of those consumers who report they **Definitely Would** or **Definitely Would Not** go to the following healthcare facilities for care today.



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

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

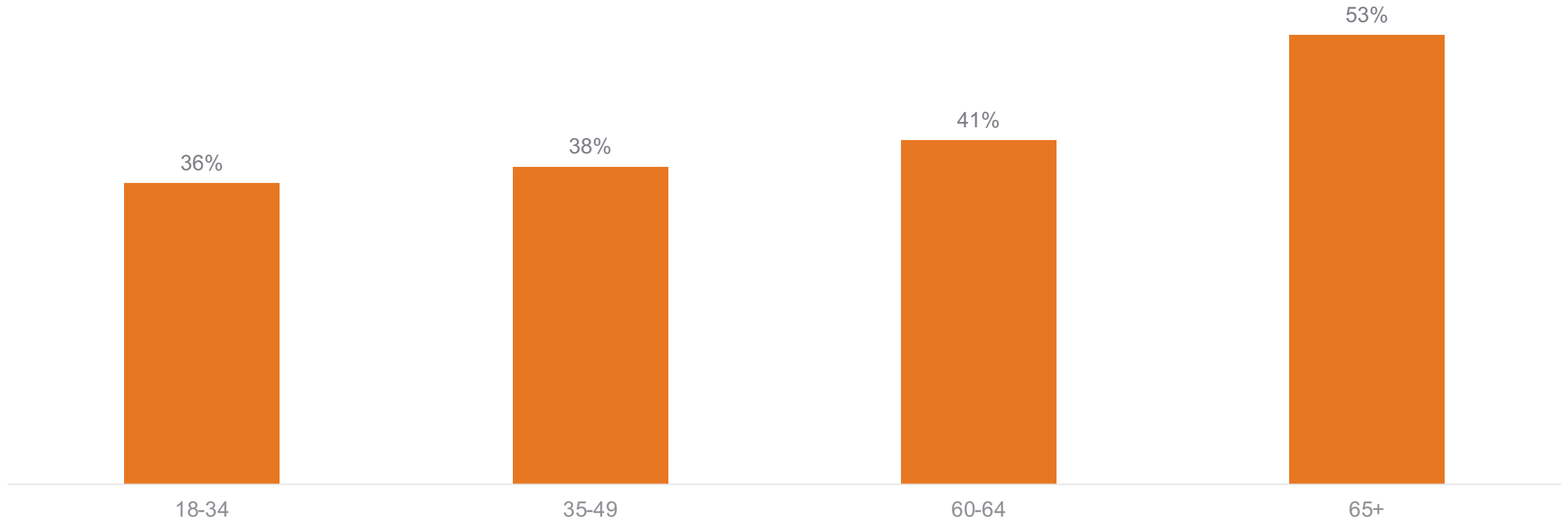
*How likely are you to go to an appointment with your doctor today, if it was already scheduled and there were no cancellation fees? **Very Likely and Definitely Would Combined by Age Group***



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

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

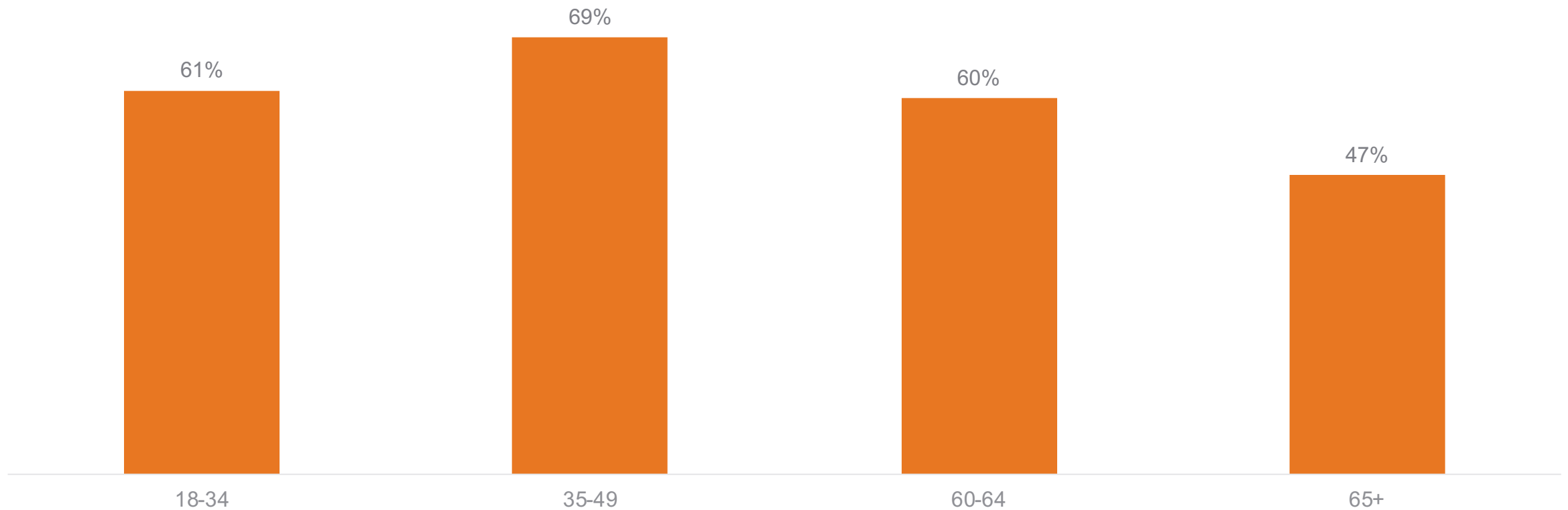
*How likely are you to go to a hospital for an elective procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees? **Very Likely and Definitely Would Combined by Age Group***



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 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? **Total Percent Likely by Age Group***



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

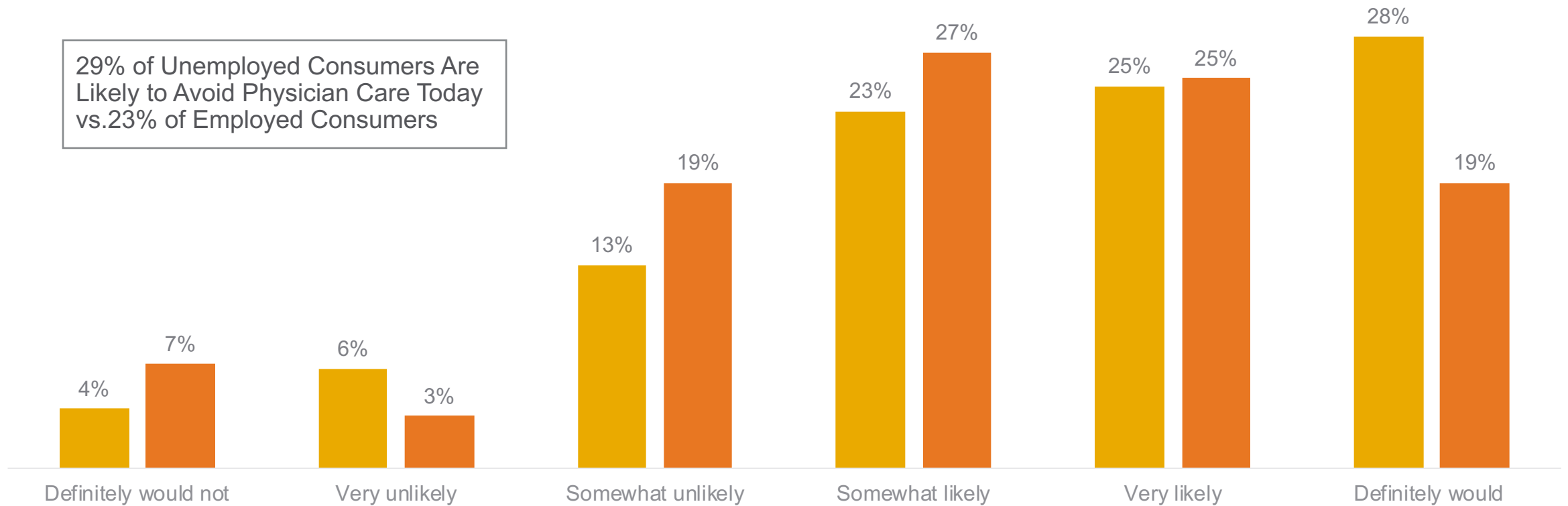


Unemployed consumers more likely to avoid **physician care**

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

29% of Unemployed Consumers Are Likely to Avoid Physician Care Today vs. 23% of Employed Consumers



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

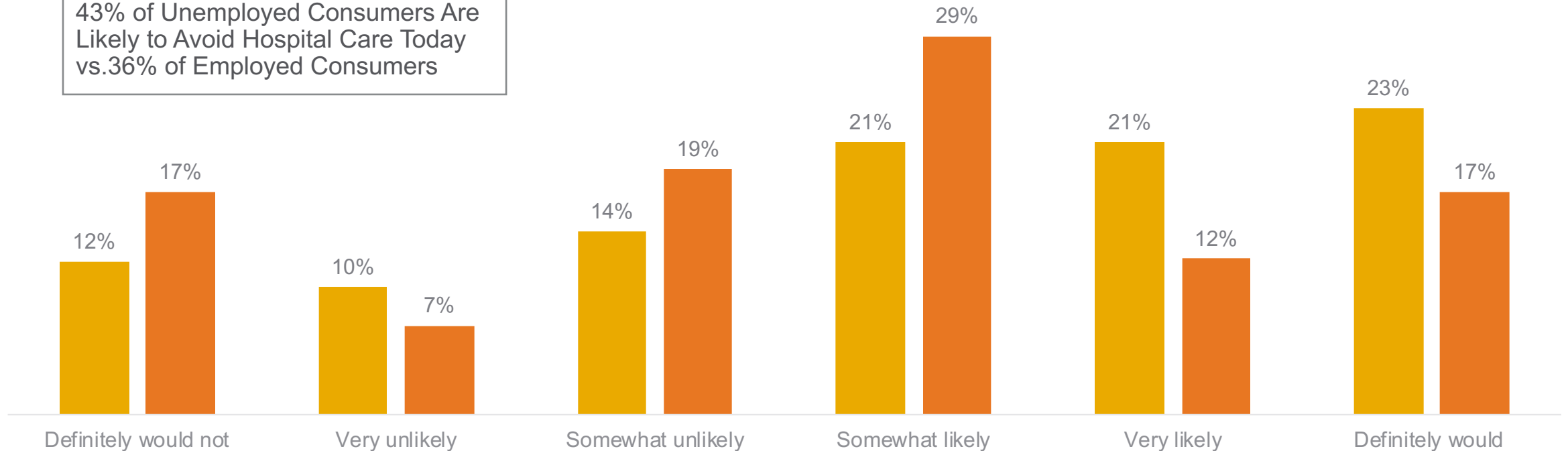


Unemployed consumers more likely to avoid hospital care

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

43% of Unemployed Consumers Are Likely to Avoid Hospital Care Today vs. 36% of Employed Consumers



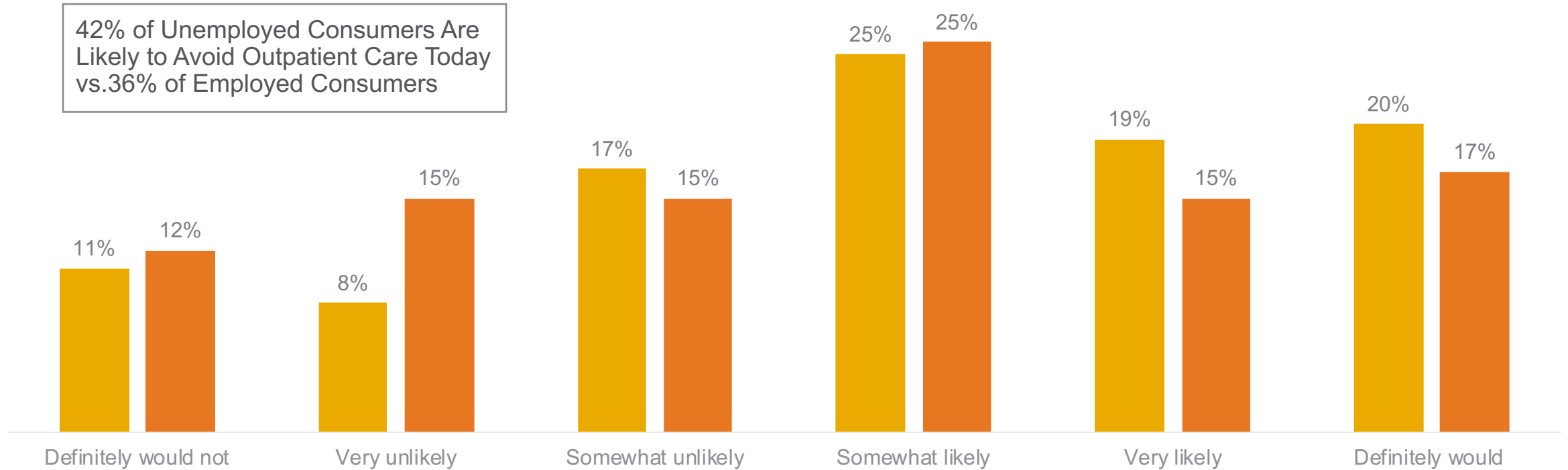
Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

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

42% of Unemployed Consumers Are Likely to Avoid Outpatient Care Today vs. 36% of Employed Consumers



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

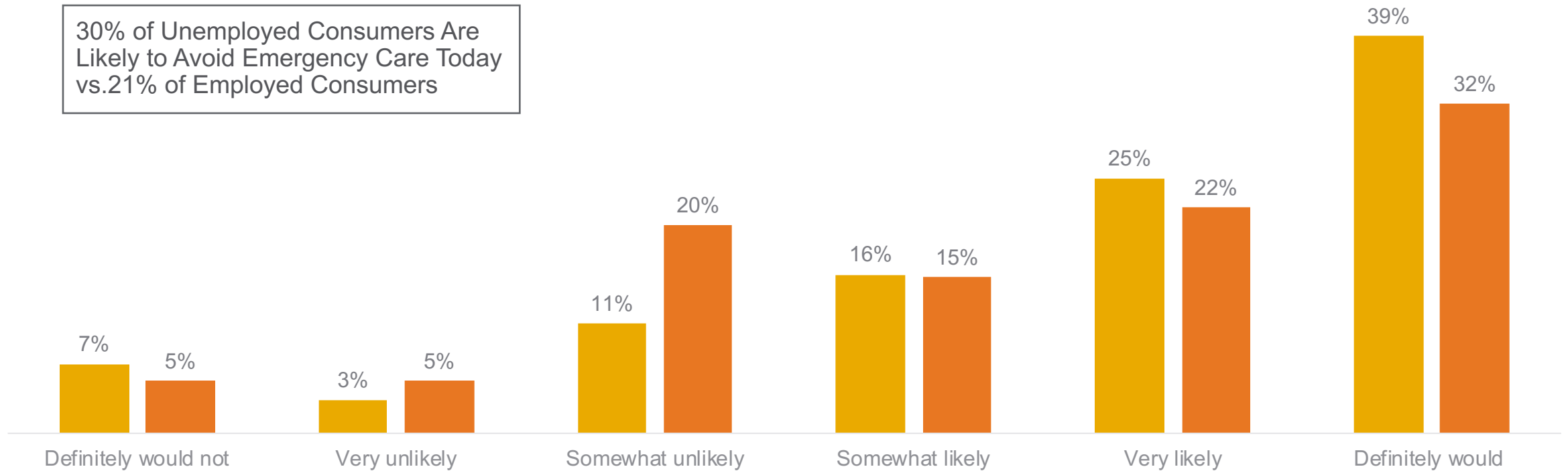


Unemployed consumers more likely to avoid emergency care

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

■ Employed ■ Unemployed

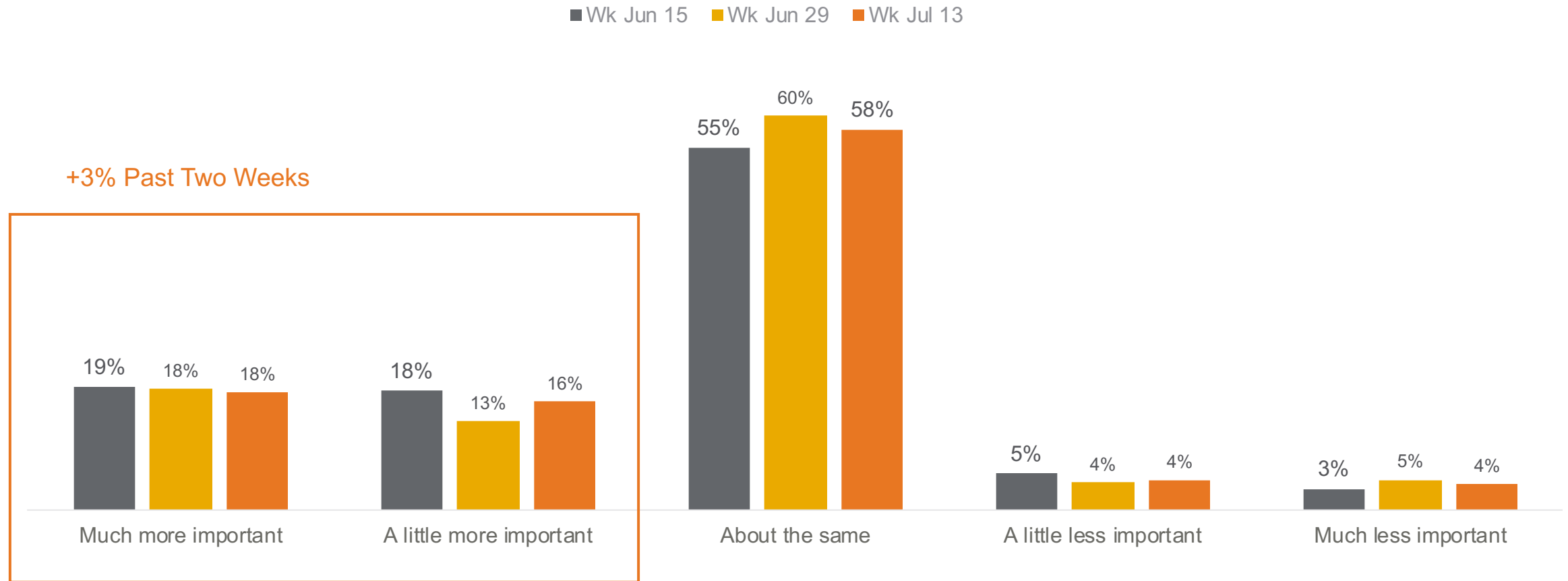
30% of Unemployed Consumers Are Likely to Avoid Emergency Care Today vs. 21% of Employed Consumers



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

One in three (34%) view healthcare brands as more important

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

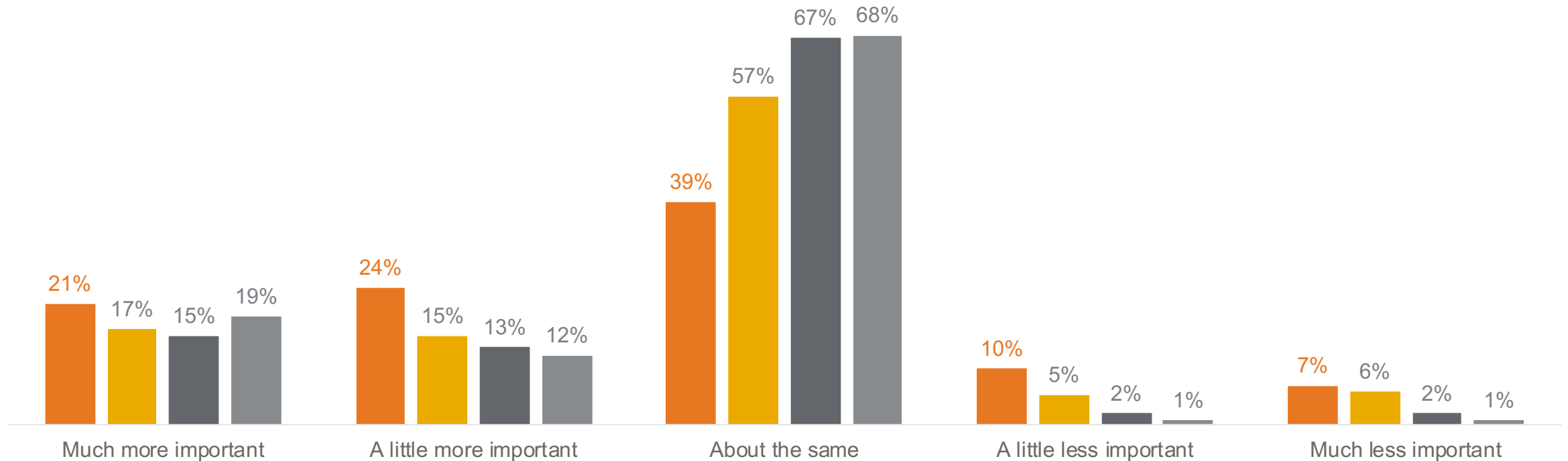


Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

Younger consumers feel healthcare brands are more important

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

■ 18-34 ■ 35-49 ■ 50-64 ■ 65+



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020



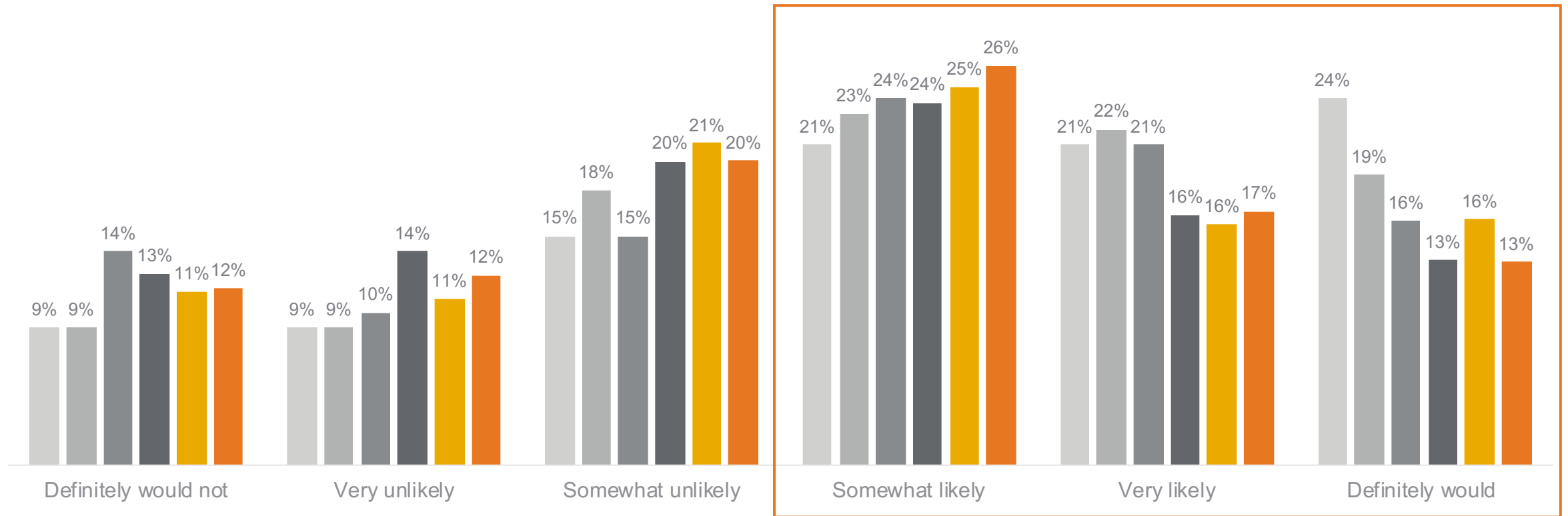
Use of hospitals and health systems



56% 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?

■ Wk May 4 ■ Wk May 18 ■ Wk June 1 ■ Wk June 15 ■ Wk June 29 ■ Wk July 13 -1% Past Two Weeks

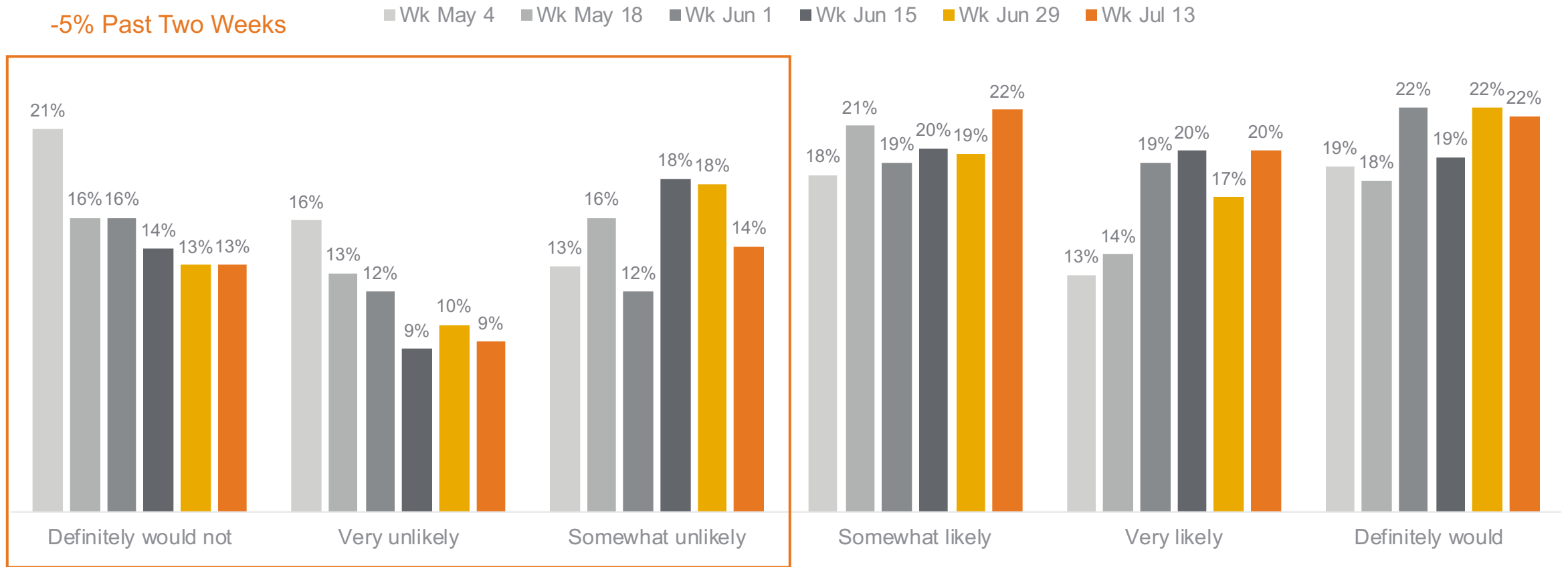


Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020



37% 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 7/13-7/17, 2020

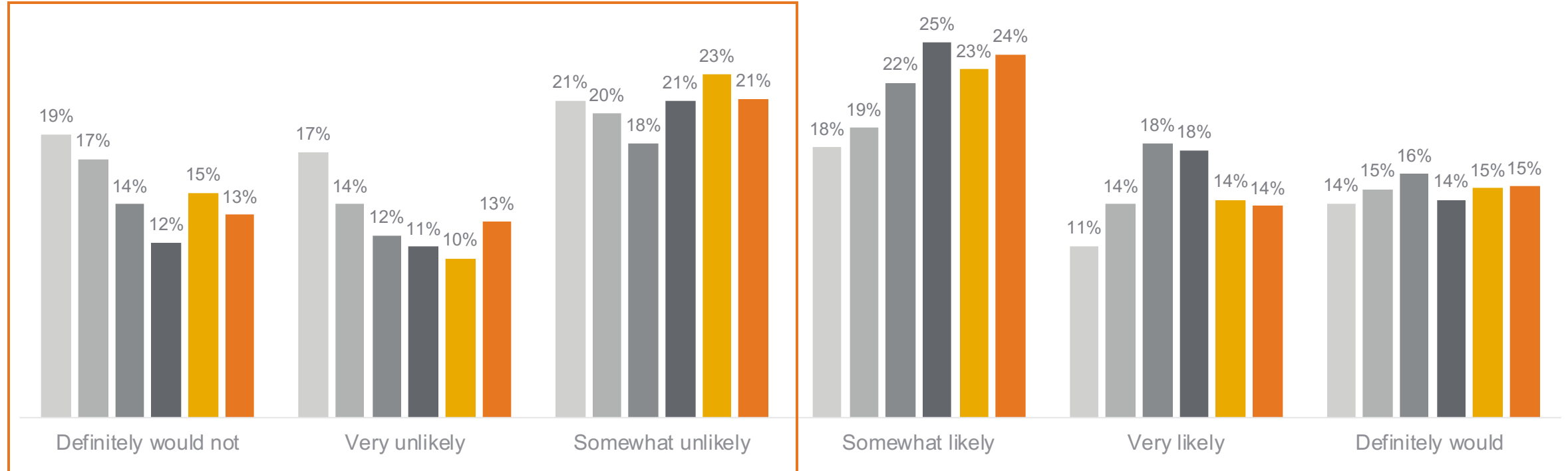


47% still unlikely to visit a family member in the hospital today

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 ■ Wk Jul 13

-1% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

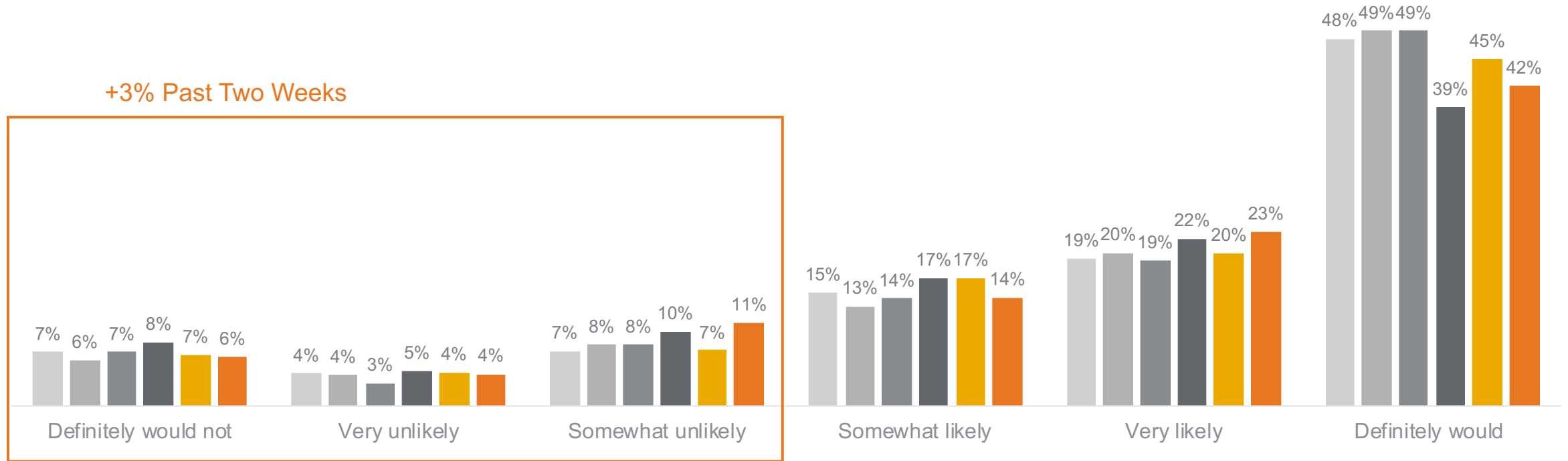


Use of hospital emergency departments

21% 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 ■ Wk Jul 13



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/7, 2020



Use of outpatient and freestanding centers

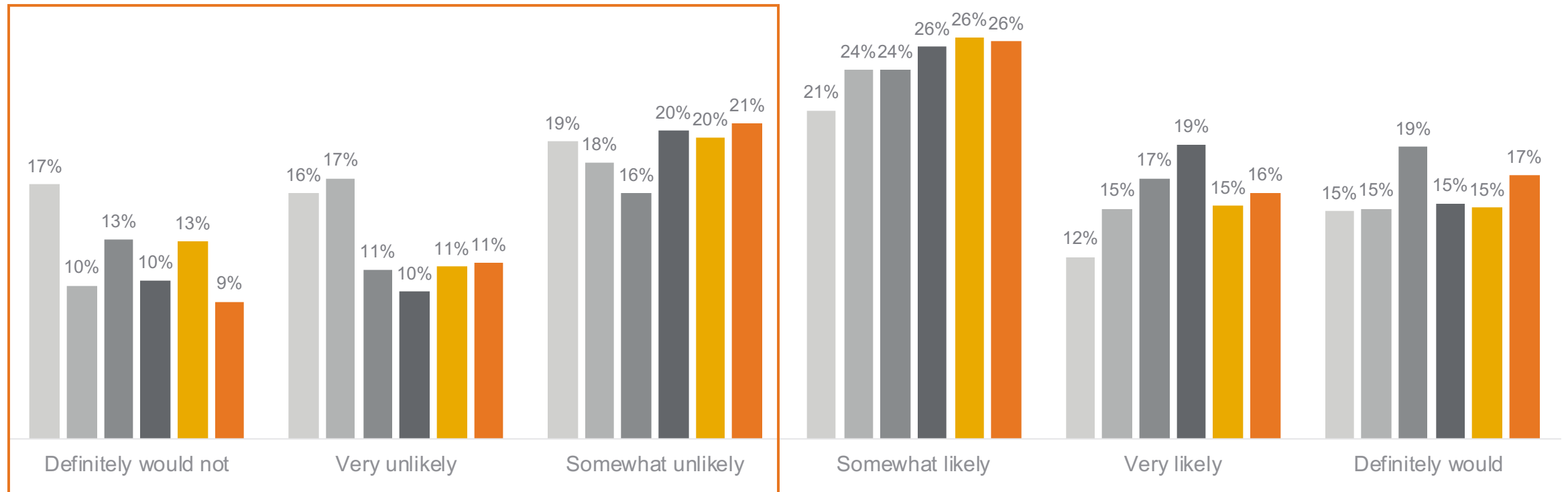


41% remain unlikely to use an urgent care center today

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 ■ Wk Jul 13

-3% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020

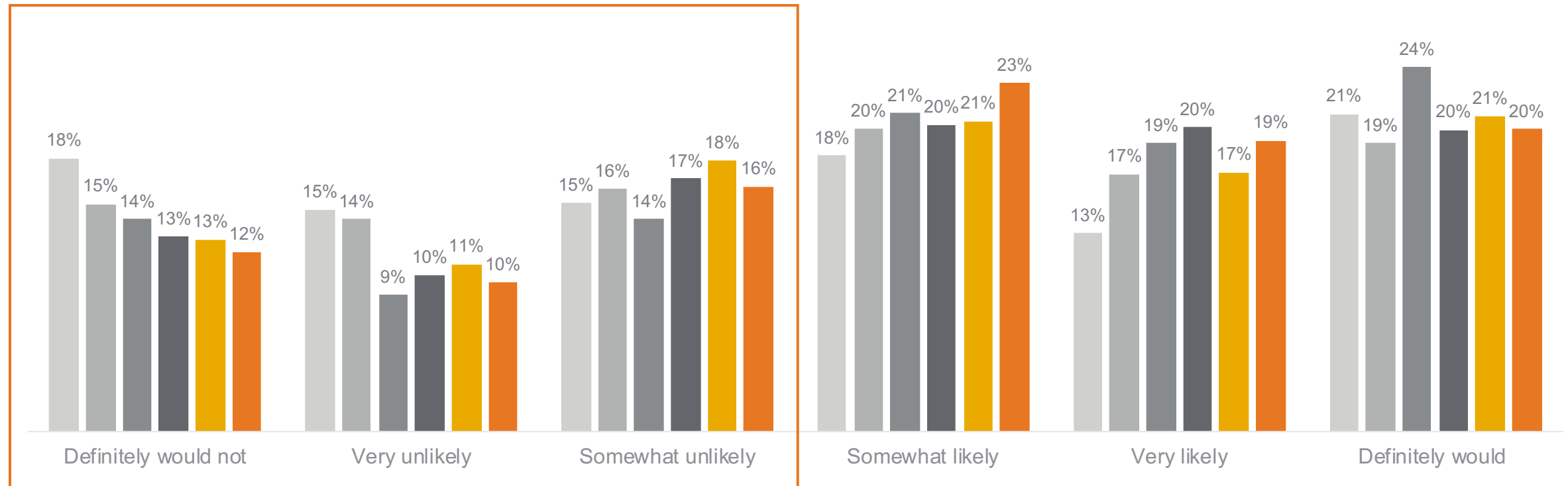


38% still unlikely to use an outpatient facility today

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 ■ Wk Jul 13

-4% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020



Use of physician practices

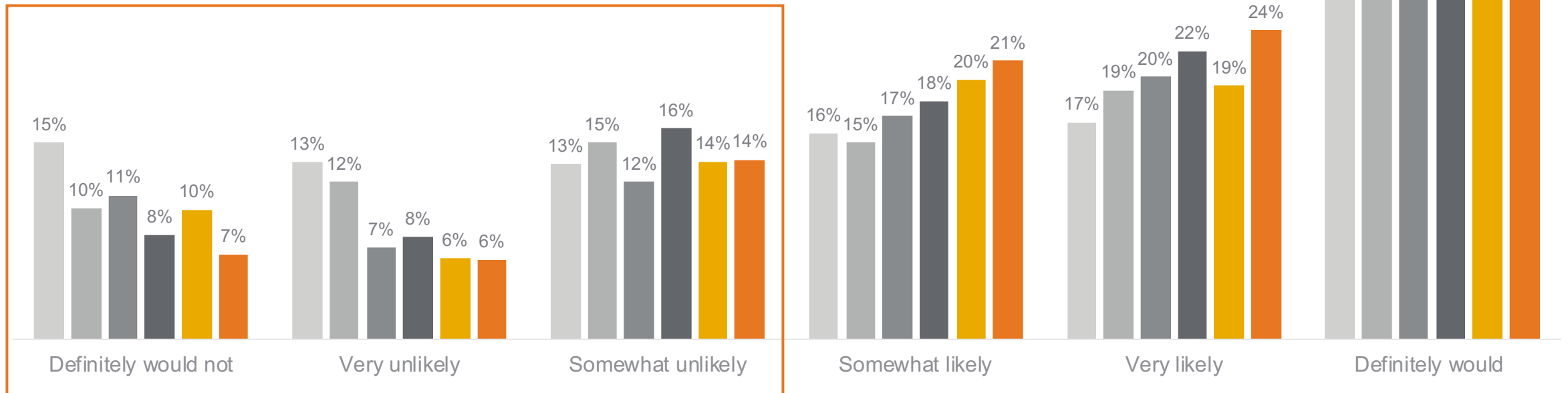


27% remain unlikely to see a doctor today

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 ■ Wk Jul 13

-3% Past Two Weeks



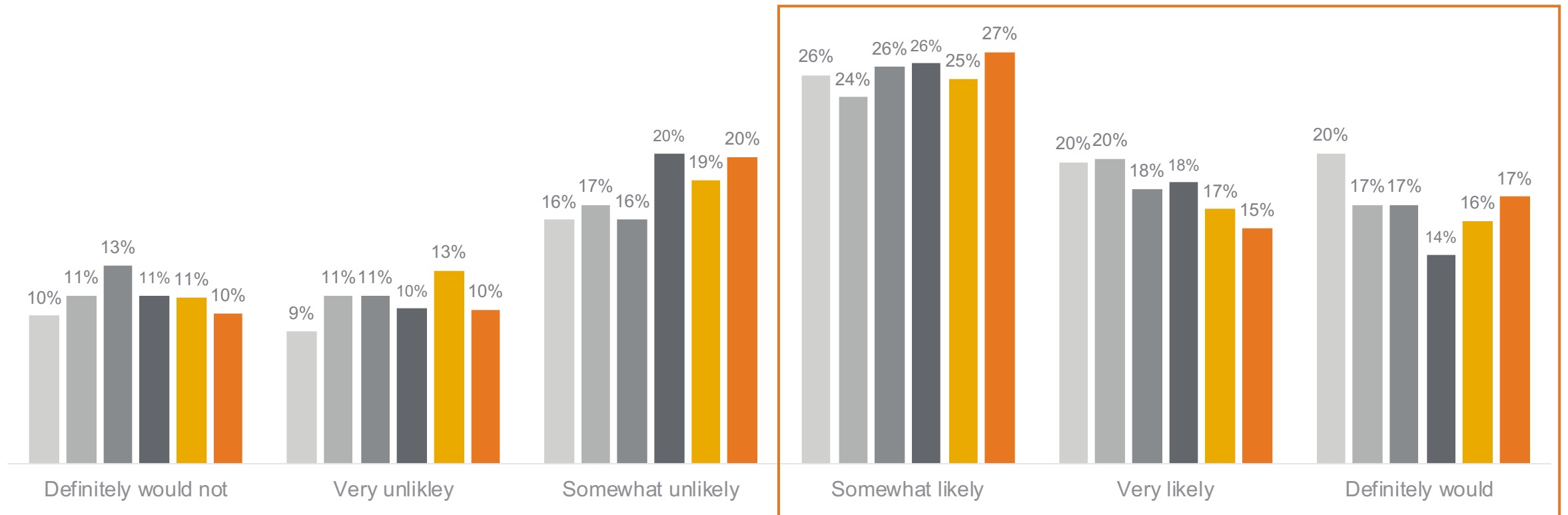
Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 2020



60% 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
 ■ Wk Jul 13
 +1% Past Two Weeks



Source: Optum Consumer Pulse Survey, N=700, conducted 7/13-7/17, 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 1-6 of the Consumer Pulse Survey
- ✓ Request to be notified when our next Wave is published
- ✓ 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