

COVID-19 Consumer Behavior

Key Findings and Takeaways from Wave 3 of the Optum Consumer Pulse Survey

June 18, 2020



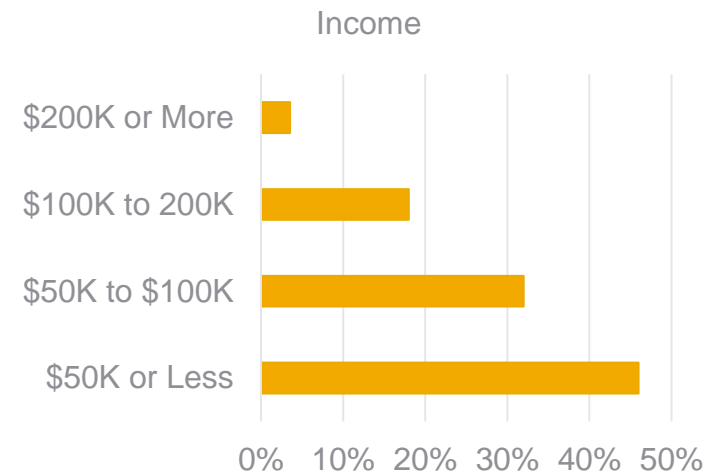
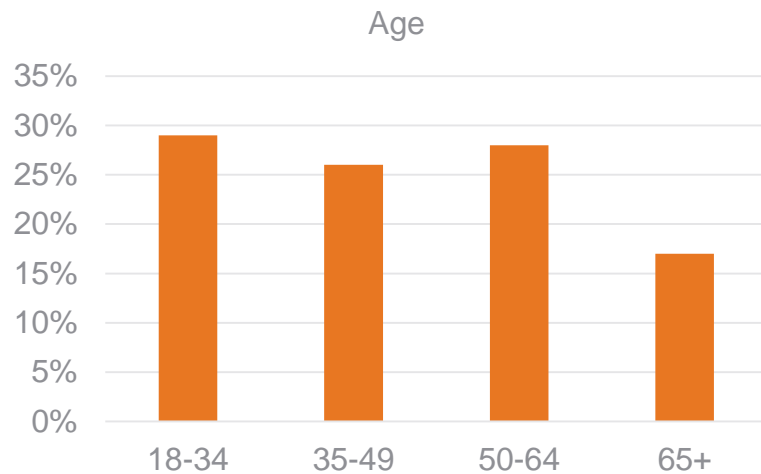
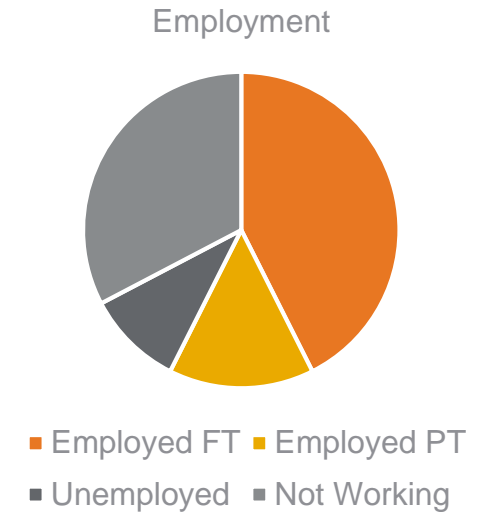
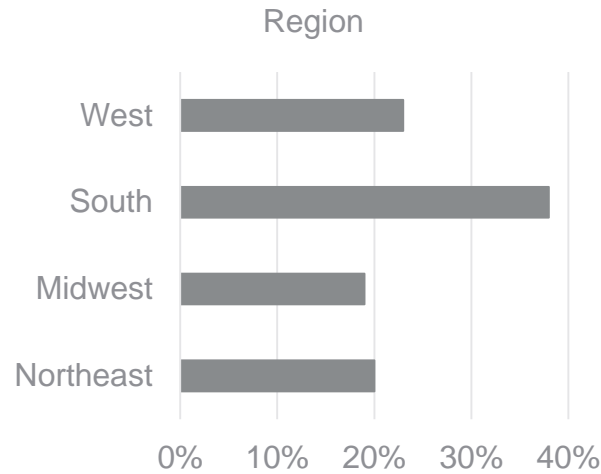
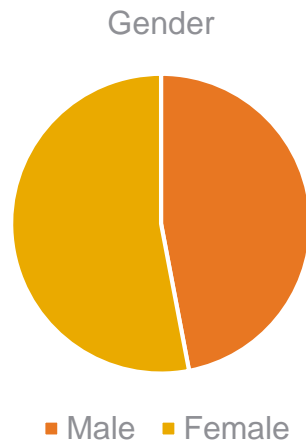
Overview of the Optum COVID-19 Concern Index

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 1-3 of a six-part research series that began May 4. Upcoming surveys are being conducted the weeks of June 15, 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

Consumer Pulse Survey respondent profile

Summary of Wave 3 (June 1-5) respondent profiles. Organized for ease of use. N = 700 and MOE of +/- 4%



Key findings and takeaways

While more consumers are willing to show up for a previously scheduled medical procedure in a hospital today; ***a majority are still likely to postpone***

- **61% of consumers are still likely to reschedule or postpone a medical procedure in a hospital** that was scheduled for today; down just slightly from 64% two weeks ago and 66% four weeks ago.
- Overall, our “**Consumers Likely to Postpone Hospital Care**” Curve has **flattened slightly** with equal numbers now saying they “Definitely Would” postpone at 16% and those saying they “Definitely Would Not” postpone at 14%.
- There continues to be a widening gap between older men and women. While just 50% of men who are 65+ say they would likely postpone hospital care today, **fully 69% of women who are 65+ say they would likely postpone.**
- Consumers in the **Northeast are most likely to postpone (67%)**, followed by those in South (64%), Midwest (63%) and the West (52%).

Key findings and takeaways CONTINUED

A significant number of consumers would still avoid emergency care today, even if they were experiencing life threatening symptoms

- The number of consumers who say they would **likely avoid the ED despite showing signs of a heart attack or appendicitis remains at 18%** – virtually unchanged since the start of the survey six week ago.
- And **27% of those who are unemployed would still avoid the ED** even for life threatening symptoms.
- The numbers of consumers who say they would **likely avoid the ED despite a cut that may require stitches remained unchanged at 34%**.
- While **60% of consumers would now use an urgent care center or other freestanding medical center** for a minor illness or injury – moving up from 55% two weeks ago and just 48% four weeks ago.

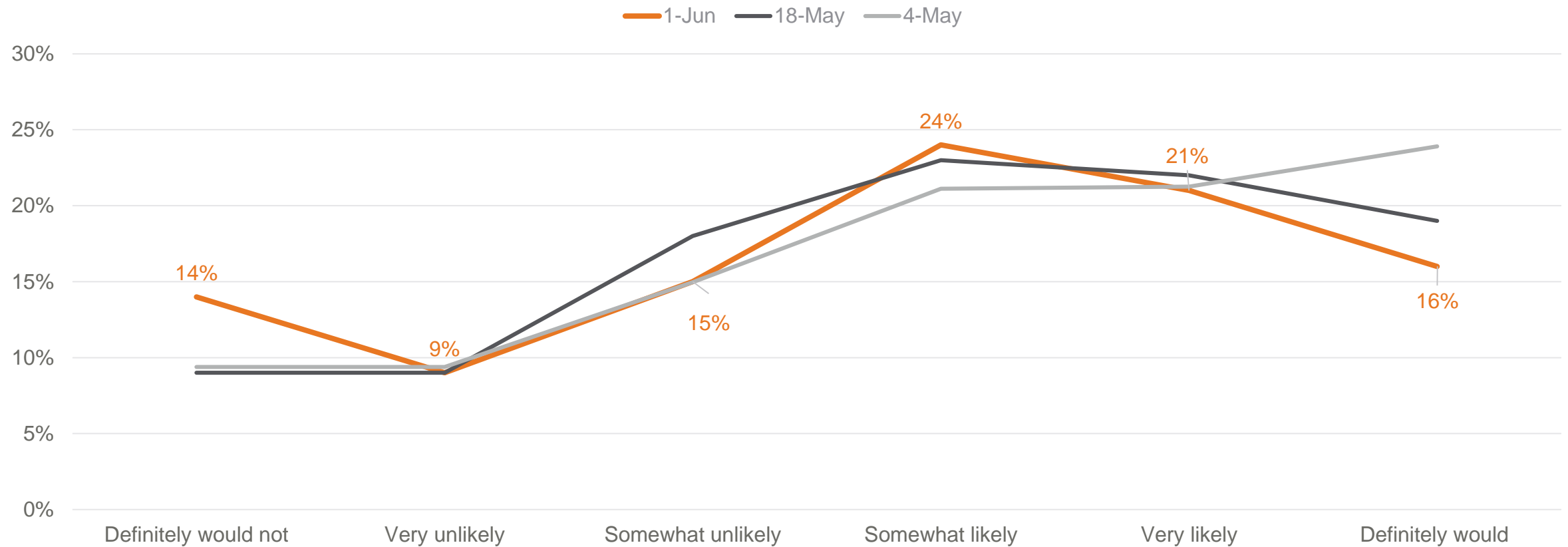
Key findings and takeaways CONTINUED

The number of consumers willing to seek care in a physician's office today continues to grow, **but this varies by region and demographic group**

- The number of consumers who are **likely to keep a previously scheduled doctor's appointment is now 70%** (up from 62% two weeks ago).
- But **regional variations are also more noticeable**: For example, 78% of consumers in the Midwest say they would likely seek care in a physician's office, but just 61% of consumers in the Northeast would.
- We also see **big differences by gender and age** – with 88% of males 65+ likely to see a physician, but just 64% of females 65+ likely to do so today.
- The number of consumers who **would prefer to use a virtual platform** like telehealth to see their physician has remained unchanged at 61%.

Consumers Likely to Postpone Care Curve is Flattening Somewhat

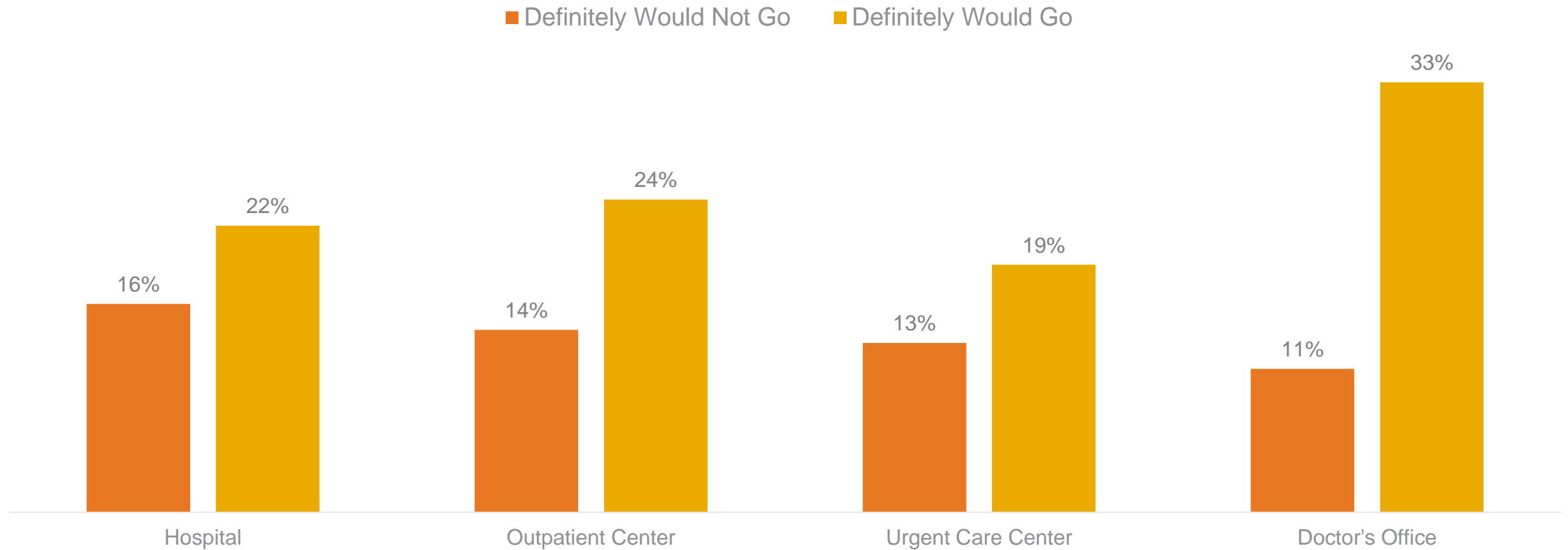
How likely are you to reschedule or postpone a medical exam or procedure at a hospital that was scheduled for today because of COVID-19?



Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

Consumers Most Likely to Visit a Physician vs. Hospital Today

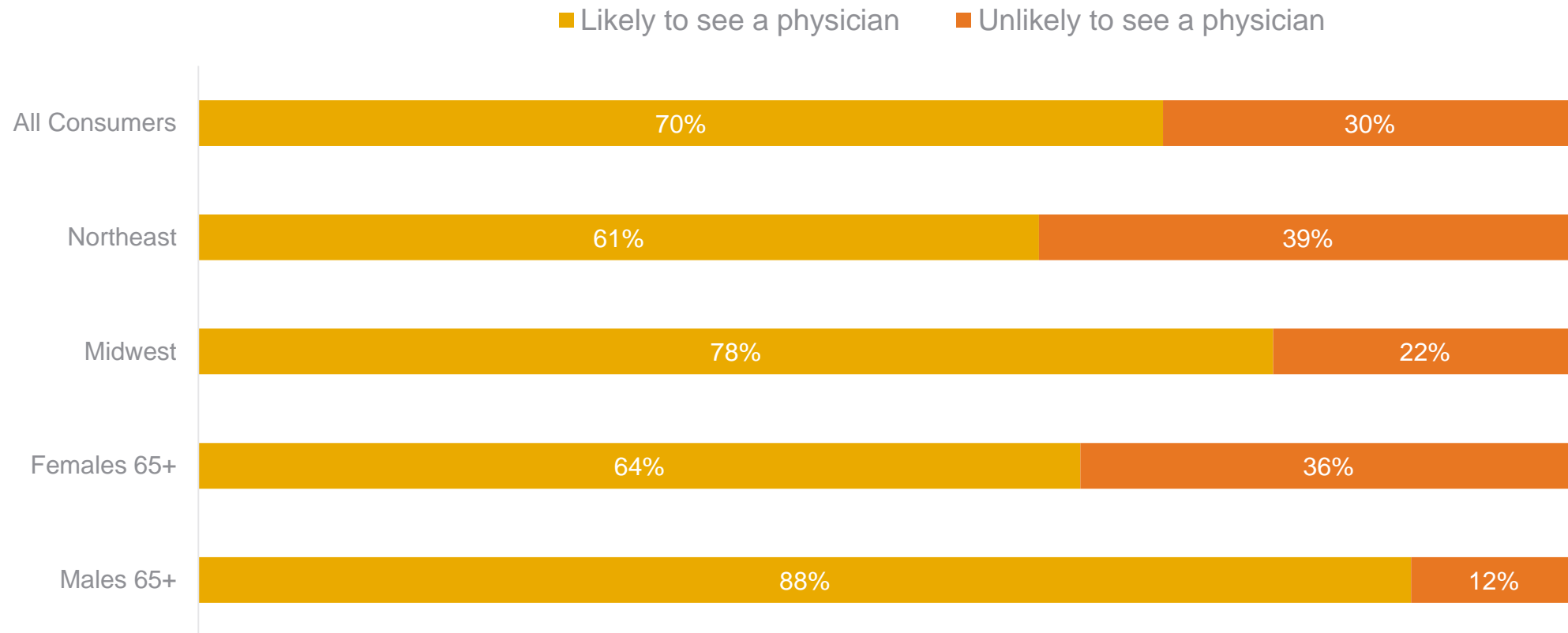
Wave 3 Top Box Scores: Summary findings of those consumers who report they **Definitely Would** or **Definitely Would Not** go to the following healthcare facilities for care today.



Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

But Significant Differences Remain Among Consumer Groups

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



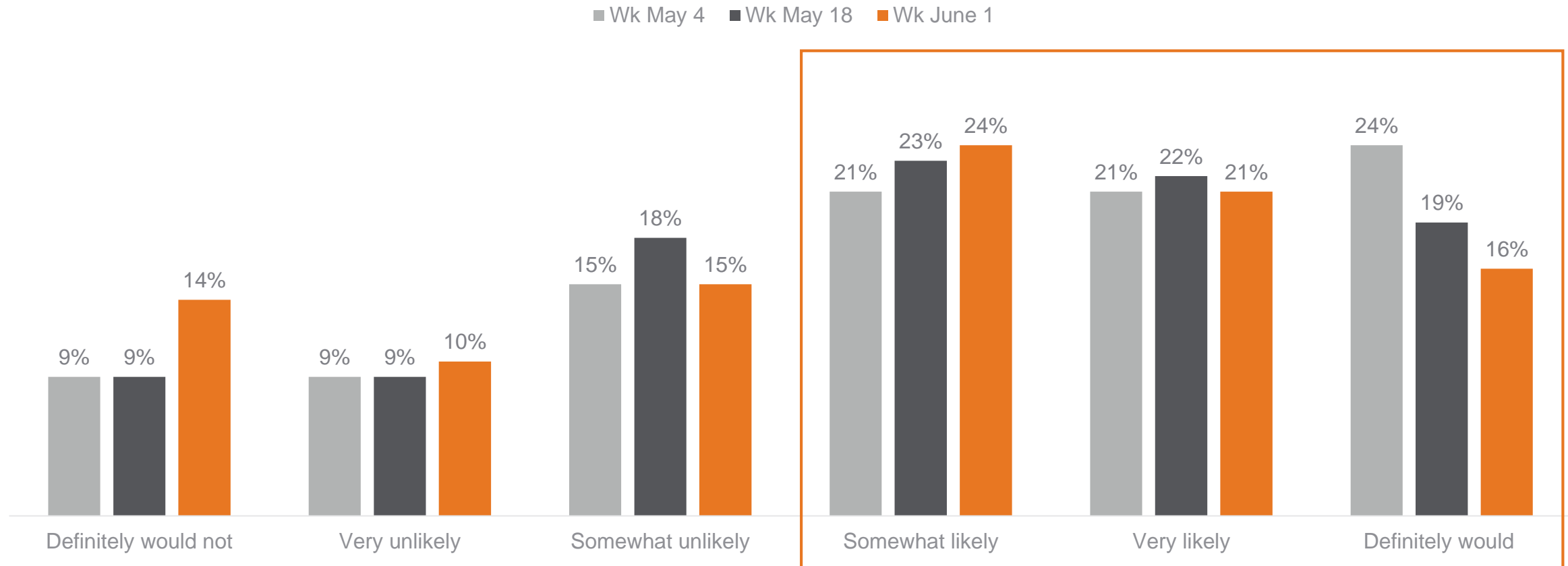
Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

Use of hospitals and health systems



61% still likely to postpone hospital care today

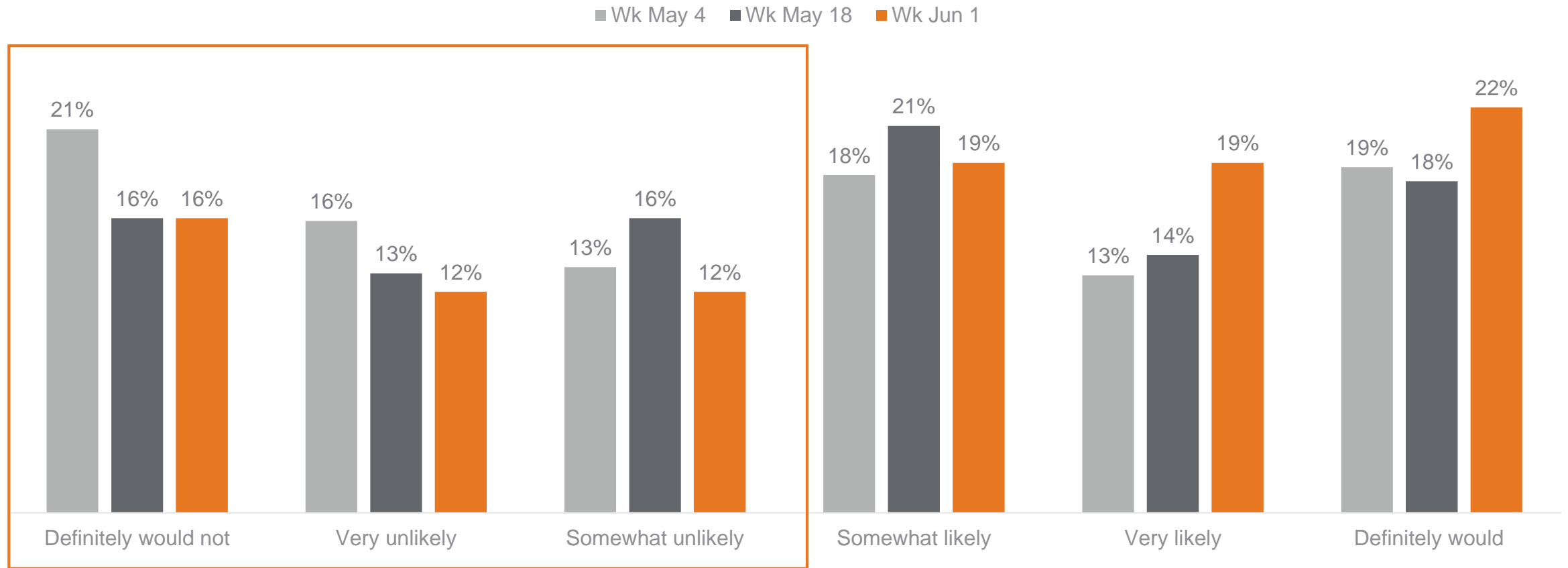
How likely are you to reschedule or postpone a medical exam or procedure at a hospital that was scheduled for today because of COVID-19?



Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

40% still unlikely to use a hospital for an elective procedure today

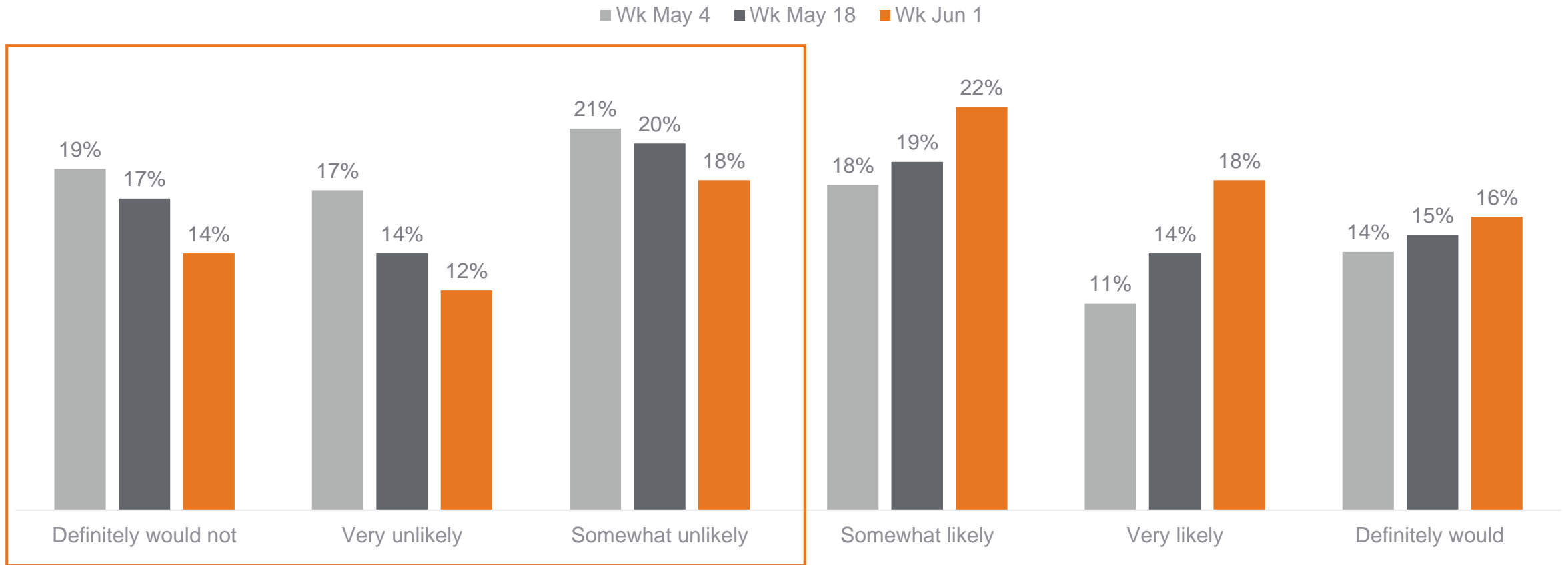
How likely are you to go to a hospital for an elective procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees?



Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

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?

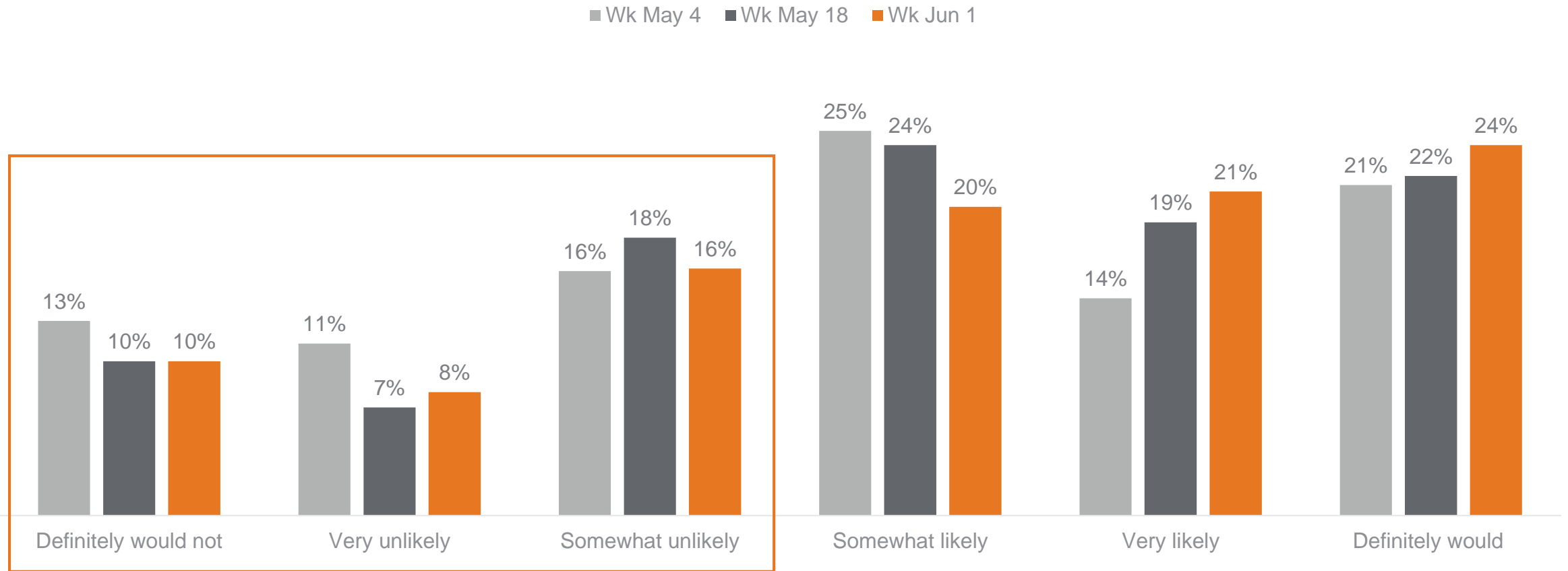


Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

Use of hospital emergency departments

34% still unlikely to use an ER for a “minor” injury today

How likely are you to go to a hospital emergency room if you cut your finger today and believed you might need stitches?

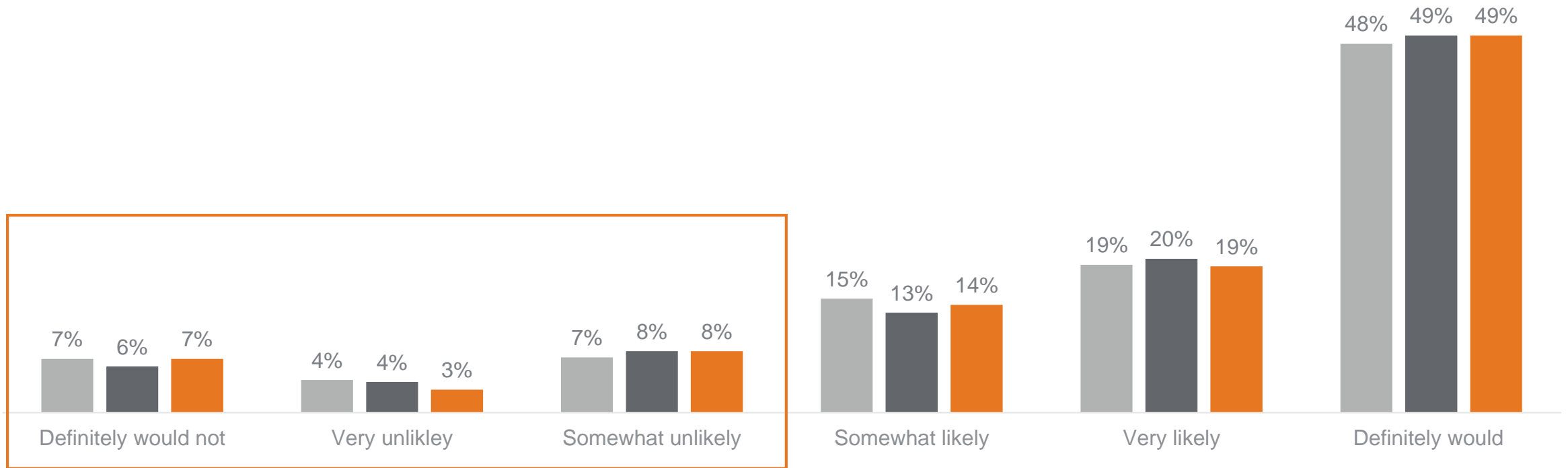


Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

18% remain 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



Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020



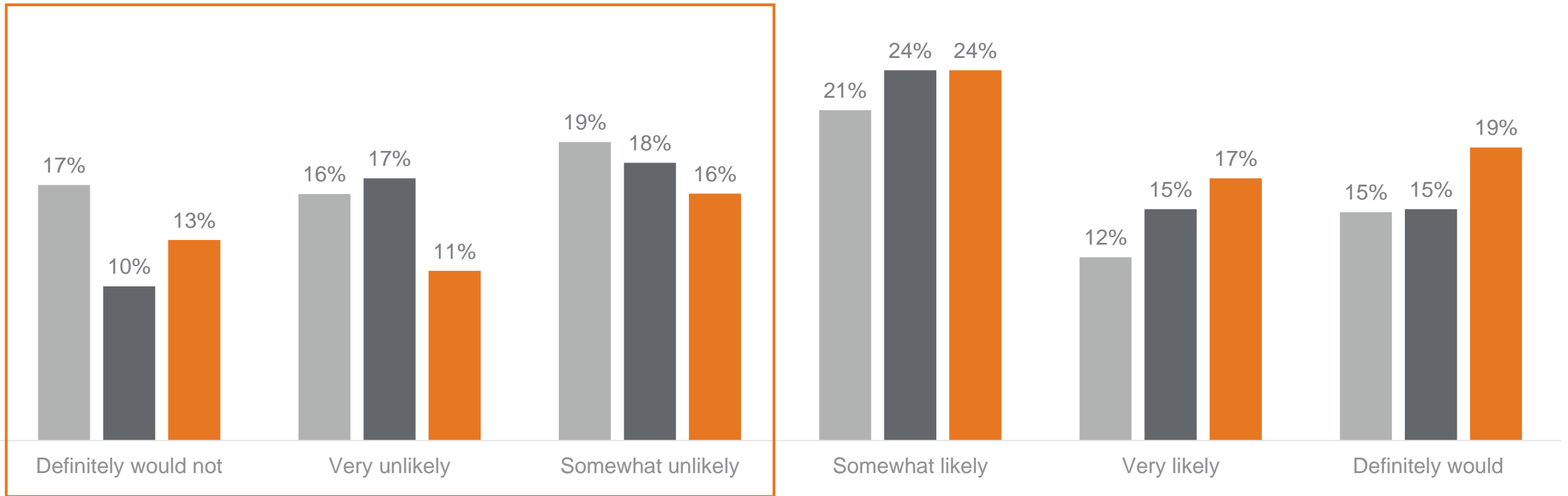
Use of outpatient and freestanding centers



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?

■ Wk May 4 ■ Wk May 18 ■ Wk Jun 1



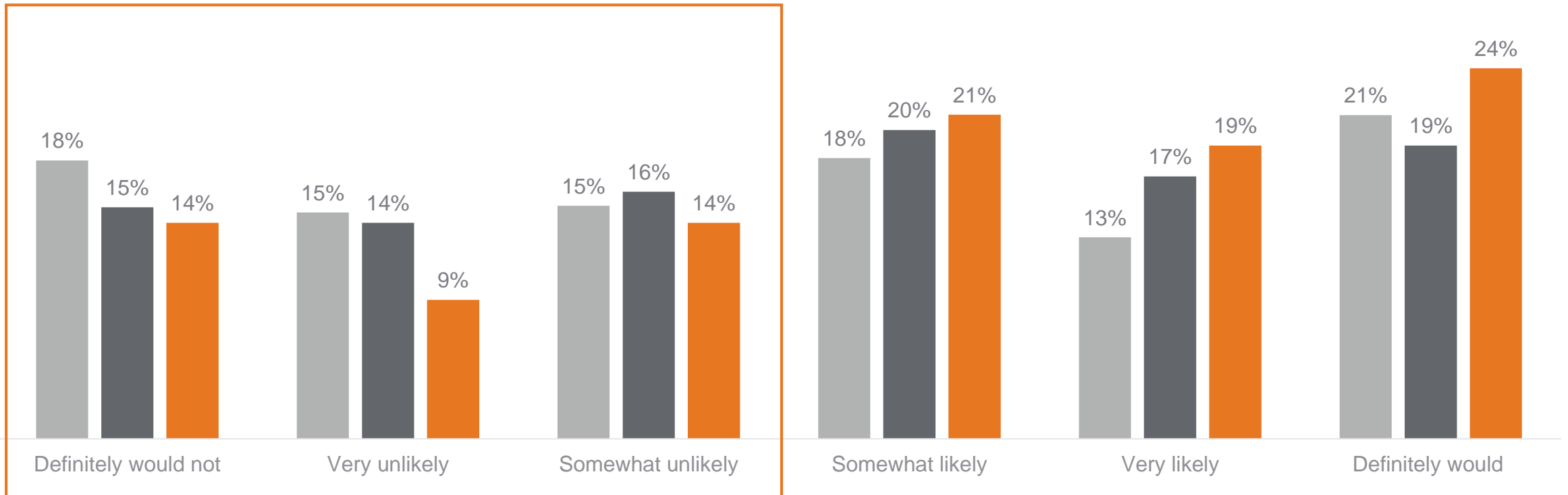
Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020



37% 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



Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 2020

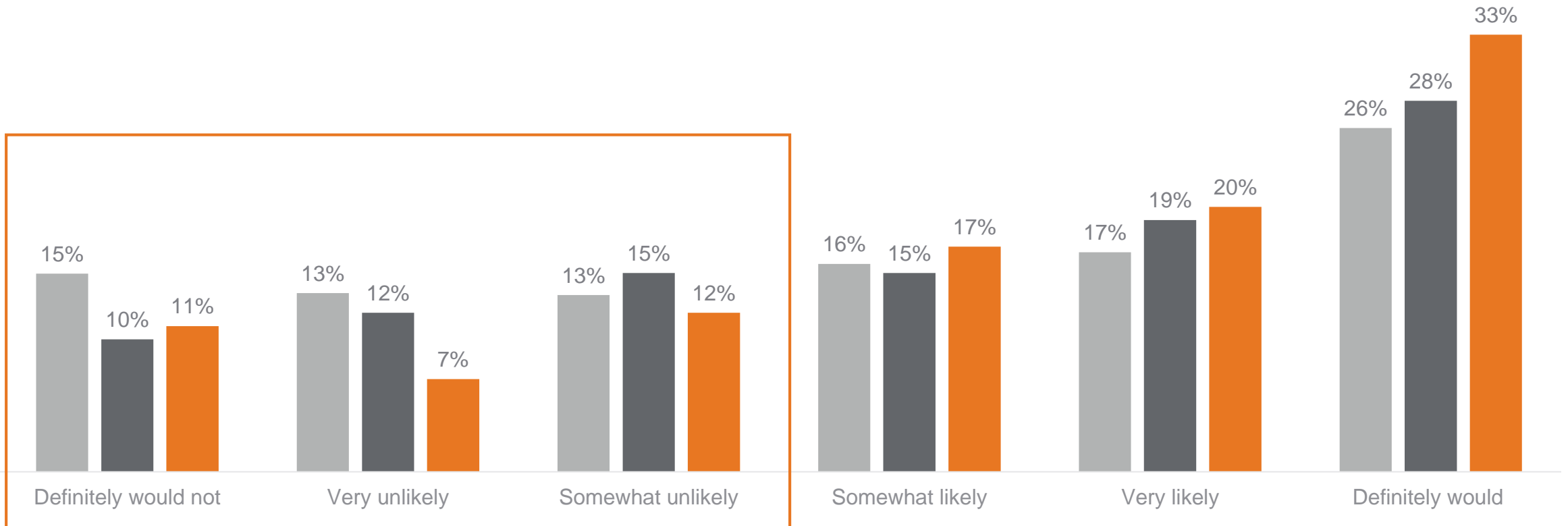
Use of physician practices



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



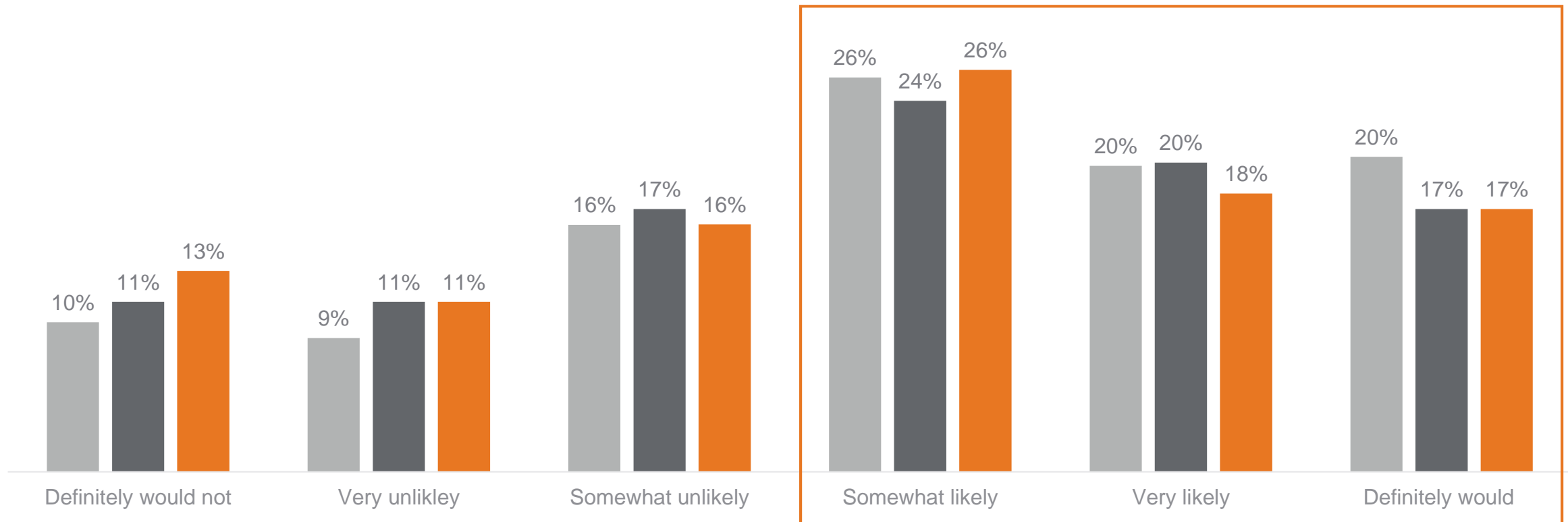
Source: Optum Consumer Pulse Survey, N=700, conducted Weeks of May 4-8 and May 18-22



61% 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



Source: Optum Consumer Pulse Survey, N=700, conducted June 1-5, 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 1-3 of the Consumer Pulse Survey
- ✓ Request to be notified when Wave 4 is published (Week of June 22)
- ✓ 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