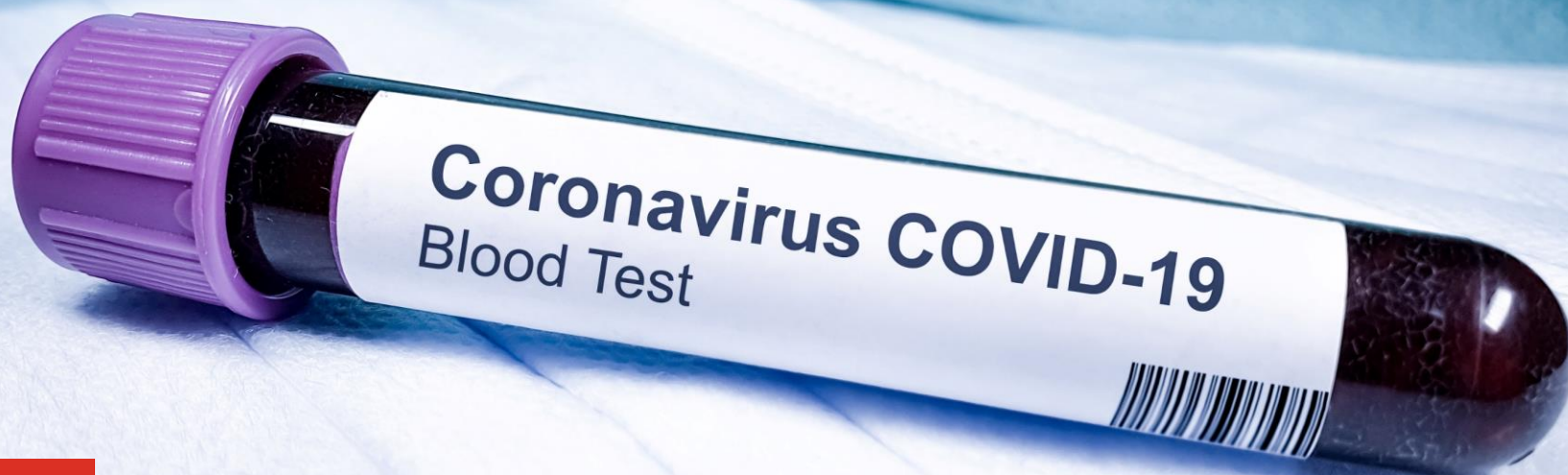




PUBLIC OPINION
STRATEGIES

turning questions into answers



National Public Opinion Data: Re-Engaging With The Healthcare System

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Overview




This summary draws from multiple national surveys that have been conducted over the past few weeks about the impact of the Coronavirus outbreak on the country and the ways in which it has already impacted and may continue to impact how Americans begin to re-engage with the healthcare system.


Key Takeaways

- 
- 1) There is no question the Coronavirus outbreak has had an enormous impact on providers. But from the patient's point of view, the outbreak has perhaps had an equally significant impact. More than 80% of Americans are concerned about exposure to infection in a medical facility, one-third state that they would not go into a medical facility right now and a majority say that they or someone in their house has skipped/delayed care since the outbreak began.
 - 2) People are bad predictors of their own future behavior (polls are designed to be a snapshot of a given moment in time), so we are closely tracking shifts in attitudes about returning to normal life and resuming everyday activities as signals for re-engagement with the healthcare system. Most Americans are not there, which for some, will delay willingness to engage with the healthcare system.
 - 3) A majority of Americans believe it will take at least 6 months to resume normal activities. And when life does begin to resume, many expect "changes" (e.g., restaurants reconfigured to accommodate social distancing, businesses conducting temperature checks, etc.). For many Americans, there will be similar expectations of healthcare providers.

Key Takeaways (Continued)

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- 4) The longer we have lived through our new way of life, the longer people say it will take them to return to normal activities. As states reopen, pay attention to restaurant traffic, retail traffic, public transportation utilization, etc. If these types of things do not see a meaningful rebound, it is difficult to imagine provider volumes will return to pre-coronavirus levels anytime soon.
 - 5) Many Americans currently have and will continue to have hesitations about in-person engagements with the medical system. Roughly one-third say it will take them more than 6 months to feel comfortable scheduling an elective procedure in a hospital or outpatient facility.
 - 6) But there are things providers can do to build confidence – isolating infectious diseases, new sterilization/cleanliness procedures, etc. are among the things Americans are looking for.
 - 7) Americans trust healthcare providers more than anyone for information about the Coronavirus (and issues surrounding it). BUT, they are not hearing from providers nearly enough.

Key Takeaways (Continued)

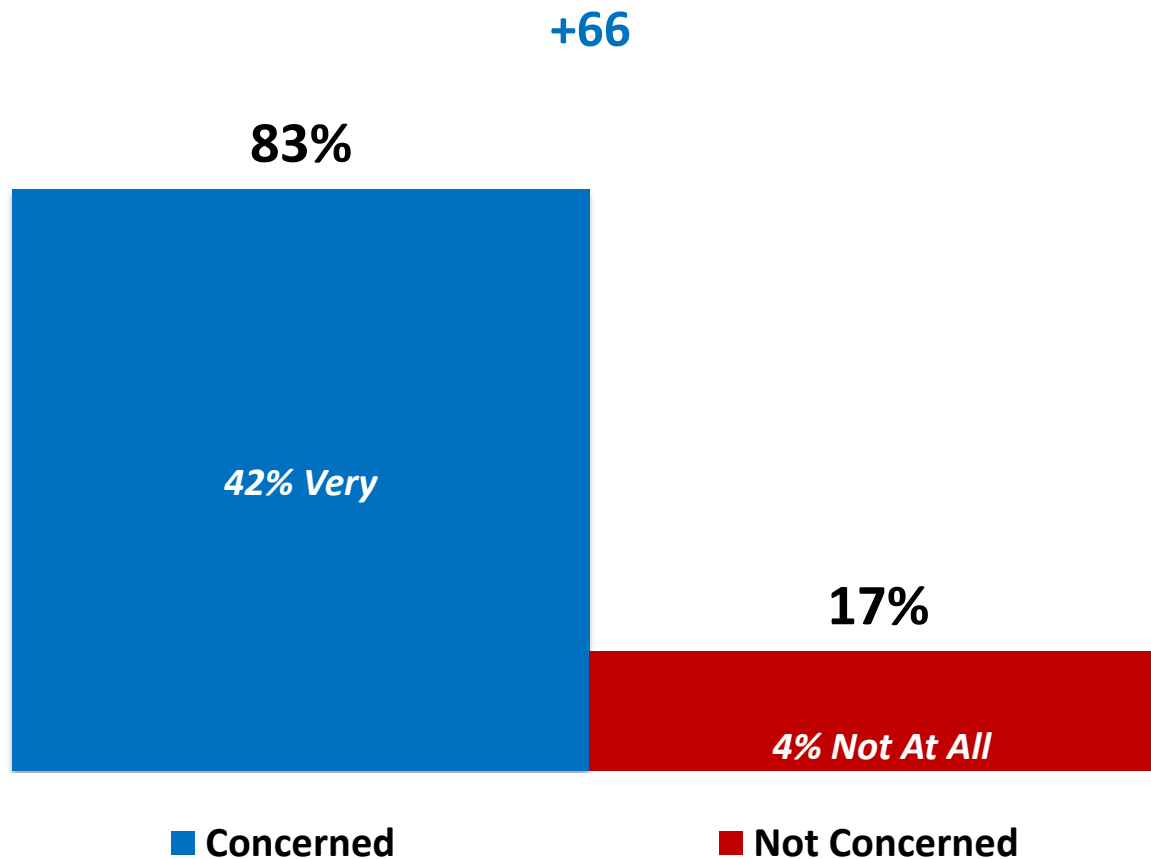
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- 8) Engagement with the healthcare system for many will be impacted by the economic effects. 45% of Americans indicate job loss or wage reduction for themselves/someone in their house. One-quarter of those who have undergone job loss or reduced wages have lost their health insurance. And a majority of Americans report spending less money in recent months than they used to, a jump of nearly 20 points from April 2019.
 - 9) There is good news – Americans are nearly unanimous in their approval of the response by healthcare providers to the outbreak. Views of and trust in providers are through the roof. And Americans **overwhelmingly** believe hospitals should be prioritized when it comes to relief funding.
 - 10) Finally, the Coronavirus outbreak could lead to long term changes in care delivery. More than one-half of those who have ever had a telehealth visit say it is a direct result of the Coronavirus outbreak. And those who have had a telehealth visit report extremely high levels of satisfaction.



Impact On Engagement With The Healthcare System

More than 80% of Americans have concerns about exposure to the Coronavirus in a medical facility.

If you needed medical treatment right now, how concerned would you be about being exposed to coronavirus at a doctor's office or hospital?

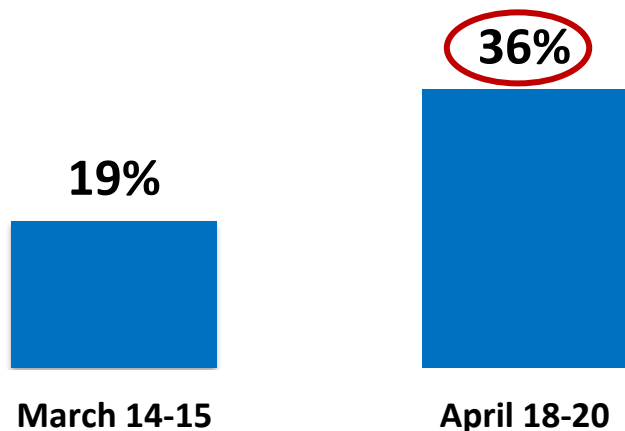


More than one-third of Americans are simply not willing to go to a medical facility right now, including more than 40% of women and seniors.

Which of the following are you **not** willing to do given the current outbreak of Coronavirus (COVID-19)?

Go to the hospital/doctor's office

% Not Willing: Total



% Not Willing: By Subgroup

	Total	Men (48%)	Women (52%)
March 14-15	19%	16%	22%
April 18-20	36%	29%	42%

	Total	18-34 (29%)	35-49 (25%)	50-64 (25%)	65+ (21%)
March 14-15	19%	21%	17%	19%	18%
April 18-20	36%	32%	34%	36%	43%

Most Americans say that they or someone in their house has missed/skipped/delayed medical appointments/procedures since the outbreak began.

Have you or has anyone in your household delayed or skipped medical care since the coronavirus began spreading in the United States? Please select all that apply.

	Total
Total Yes	55%
Yes, Delayed Or Skipped Routine Appointment Or Check Up	44%
Yes, Delayed Or Skipped An Elective Medical Procedure, Such As A Surgery	11%
Yes, Delayed Or Skipped Going To The Emergency Department For Something You Would Have Previously	5%
Total No	45%

There has been a considerable uptick in telehealth utilization...

June 2019

Have you ever used Telehealth or Virtual health options, in lieu of a doctor's office, hospital, emergency room, or urgent care clinic visit in the last 12 months?

10%

% Yes

April 2020

There is a form of medical care called Telehealth, where doctors conduct exams or consultations over the phone, internet, or with a smart phone using face time technology or messaging. Now...have you ever used Telehealth to receive care from a doctor or other health care provider?

31%

% Yes



...heavily driven by the Coronavirus outbreak.

Which of the following best describes the first time you used Telehealth to receive care from a doctor or other health care provider?

(Among Those Who Have Used Telehealth, N=251)

This year, because the coronavirus meant the doctor or health provider could not see patients in person **54%**

This year, but for reasons not connected to coronavirus **11%**

2019 **17%**

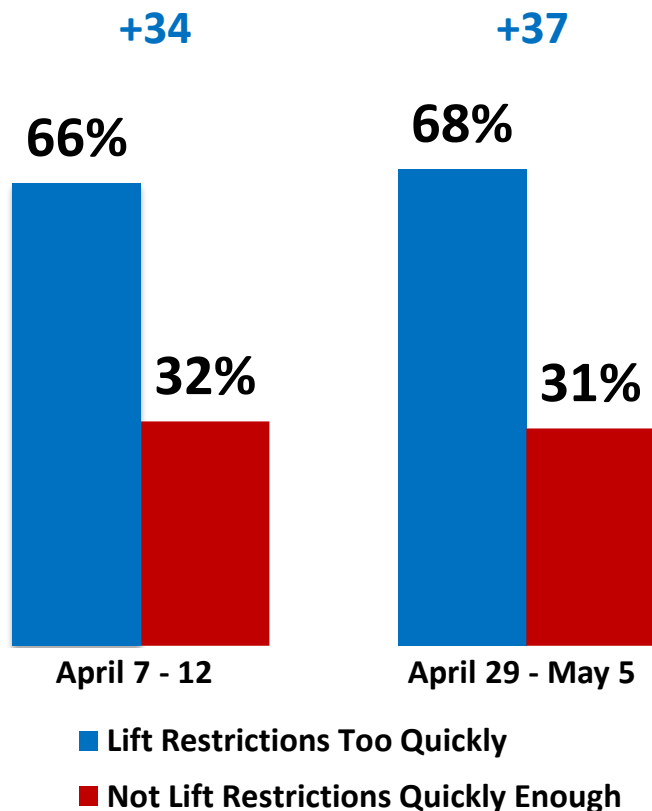
Before 2019 **18%**



Re-Engaging With Society

Most Americans are concerned about government reopening too soon and are not ready to resume normal activities.

Thinking about the decisions by a number of state governments to impose significant restrictions on public activity because of the coronavirus outbreak, is your greater concern that state governments will...



Do you think it is a good idea or a bad idea to do each of the following without further testing for the coronavirus:

	% Good Idea	% Bad Idea
Have people return to work	32%	65%
Open restaurants for people to eat in them?	19%	80%
Have students return to school	14%	85%
Allow large groups of people to attend sporting events	8%	91%

A majority of Americans do not believe things will get back to “normal” for at least six months.

How long will it take before life returns to the way it was before coronavirus started to spread?

3 Months or Less	21%
3 to 6 Months	26%
6 months or less	47%

6 months +	53%
6-12 months	25%
1 Year+	22%
Never	6%

The more time we have spent in our new way of life, the longer people say it will take them to return to normal activities.

Once the government provides information that the spread of the virus is flattening how long will it take you to do each of the following?

	Go Out To Dinner	Greet People With A Handshake	Take Public Transportation	Host / Attend A Large Social Gathering	Go To The Movies	Stay In A Hotel	Go To A Sporting Event	Fly On A Plane
Within A Month								
March 21-23	46%	32%	32%	27%	30%	24%	26%	20%
April 25-27	42%	22%	24%	21%	22%	17%	18%	14%

2-6 Months								
March 21-23	39%	38%	38%	45%	44%	45%	42%	42%
April 25-27	39%	30%	36%	42%	42%	40%	38%	35%

7 Months+								
March 21-23	14%	20%	21%	22%	23%	28%	26%	31%
April 25-27	18%	28%	29%	32%	32%	40%	37%	44%

Never Again								
March 21-23	2%	10%	9%	4%	4%	3%	6%	6%
April 25-27	1%	20%	10%	4%	4%	3%	7%	6%

Expect behavioral changes on the other side of the outbreak.

Which are you more likely to do post COVID-19 (e.g., when the economy opens, or the curve is flattened)?

Exercise	
Exercise at home (e.g., in-home gym, virtual workouts, run outside)	85%
Go to local gym	15%

~24% of Americans older than 18 have a [gym/health club membership](#)

Happy Hours	
Virtual happy hours with friends	67%
Happy hour at restaurants	33%

Eating Out	
Get take out from a restaurant	67%
Dining in restaurant	33%

Prior to the outbreak, on-premise dining [represented 52%](#) of restaurant industry dollars

Sporting Events/Concerts	
Live stream sporting events/concerts at home	67%
Attend live sporting events/live concert	33%

*A 2018 Nielsen [study](#) found ~52% of Americans go to a live music event each year

Grooming	
Buy your own grooming supplies	57%
Go to the hairdresser	43%

*A 2015 [survey](#) found ~75% of men go to barbershop/salon

Movies	
Watch a movie at home	67%
Go to the movies	33%

~75% of Americans [went](#) to a cinema at least once in 2017

Changes will be needed for many Americans to regain confidence in returning to normal life – healthcare providers should assume many will look for these types of changes.

Which of the following will make you feel safe to _____ post COVID-19

Return To Work

	Total
A policy that requires employees to stay home if they feel sick	61%
Cleaning services guarantee hygienic wipe down of seats	59%
A bottle of hand sanitizer at every desk	57%
Meetings no bigger than 10 people	48%
Desks spaced 6-feet apart	47%
Required temperature tests for employees / visitors	47%
No-beard policy (i.e., employees not allowed to have a beard)	15%
N/A - nothing will make me feel safe to return to work again post COVID-19	9%

Go Out To Eat At A Restaurant

	Total
Restaurants configured for social distancing (e.g., tables 6-feet apart)	62%
Maximum capacity limits to ensure 6-feet distance between patrons and staff	56%
Required temperature tests for customers and waitstaff	45%
No-beard policy for restaurant staff (i.e., restaurant staff are not allowed to have a beard at the restaurant)	22%
No-beard policy for patrons (i.e., patrons are not allowed to have a beard at the restaurant)	14%
N/A - nothing will make me feel safe to go out to eat at a restaurant again post COVID-19	14%

Fly On A Plane

	Total
Cleaning services guarantee hygienic wipe down of seats	55%
Hand sanitizer packets handed out with snacks	54%
Mandatory masks on the plane for passengers and crew	46%
Required temperature tests for passengers and crew	45%
Planes configured for social distancing (e.g., removing middle seat)	45%
Guarantee of circulating air	42%
Contact-less menus / disposable silverware	31%
No-beard policy for flight attendants	13%
No-beard policy for passengers	10%
N/A - nothing will make me feel safe to fly in a plane again post COVID-19	15%

Attend Sporting Event/Large Venue

	Total
Cleaning services guarantee hygienic wipe down of seats	43%
Hand sanitizer packets handed out a ticket counter / at every seating section	40%
Mandatory masks for food vendors	39%
Stadiums seating configured for social distancing (e.g., leaving every other seat open)	35%
Maximum capacity limits to ensure 6-feet distance between patrons and staff	35%
Required temperature tests for attendees and crew	32%
Mandatory masks for patrons	31%
N/A - nothing will make me feel safe to attend a sporting event or large venue again post COVID-19	21%



Re-Engaging With The Healthcare System

Americans are divided about the safety of medical facilities right now.

How safe would you feel today going to a hospital, urgent care facility or other medical facility as a patient?
Please use a 1-10 scale, where ONE means you would not feel safe at all and TEN means you would feel very safe.

**Total Mean
Score**

5.4

'8-10': 28%

'1-3': 30%

Highest	Mean	% '8-10'	Lowest	Mean	% '1-3'
Overall	5.4	28%	Overall	5.4	30%
Rural Men	6.4	48%	1 Year+ Before Normal Life	4.3	45%
Men Ages 65+	6.5	46%	Mountain Region	4.6	43%
Farm Belt	5.9	42%	New England Region	4.8	41%
Dads	6.4	41%	Suburban Women	4.6	40%
Ages 65+	5.9	39%	Uninsured	4.6	40%
Men Ages 35-54	6.1	39%	Women < College	4.7	39%
Postgraduate Degree	6.1	38%	Women Ages 18-34	4.6	38%
Men College+	6.1	38%	Moms	4.7	38%
Men	6.0	36%	Women	4.8	36%
Health Care HH	5.8	36%	High School or Less	5.0	35%

For some Americans, it will take time to re-engage the medical system.

Once state and federal health officials determine that the spread of the coronavirus is flattening and that businesses, including hospitals, can return to more normal operations, how long will it take you to do each of the following items?

	Schedule A Routine Visit In Your Doctor's Office	Schedule An Elective Procedure In A Non-Hospital Medical Facility (Sample B)	Schedule An Elective Procedure In A Hospital (Sample A)
Immediately	13%	10%	10%
1-30 Days	23%	14%	12%
Within A Month	37%	25%	22%
2-3 Months	24%	19%	17%
4-6 Months	21%	20%	21%
2-6 Months	45%	39%	38%
7-11 Months	8%	9%	11%
A Year+	9%	23%	24%
7 Months+	17%	32%	35%
Never Again	2%	4%	5%

Concern over safety is and will continue to be a factor for patients.

And, what was the reason for the delay of the elective procedure? Please select all that apply.

(Asked Among Those Who Have Delayed Or Skipped An Elective Procedure)

	Total
Hospital cancelled or postponed the procedure	53%
Did not feel safe going to the hospital or medical facility	35%
Loss of income	20%
Change in insurance	16%

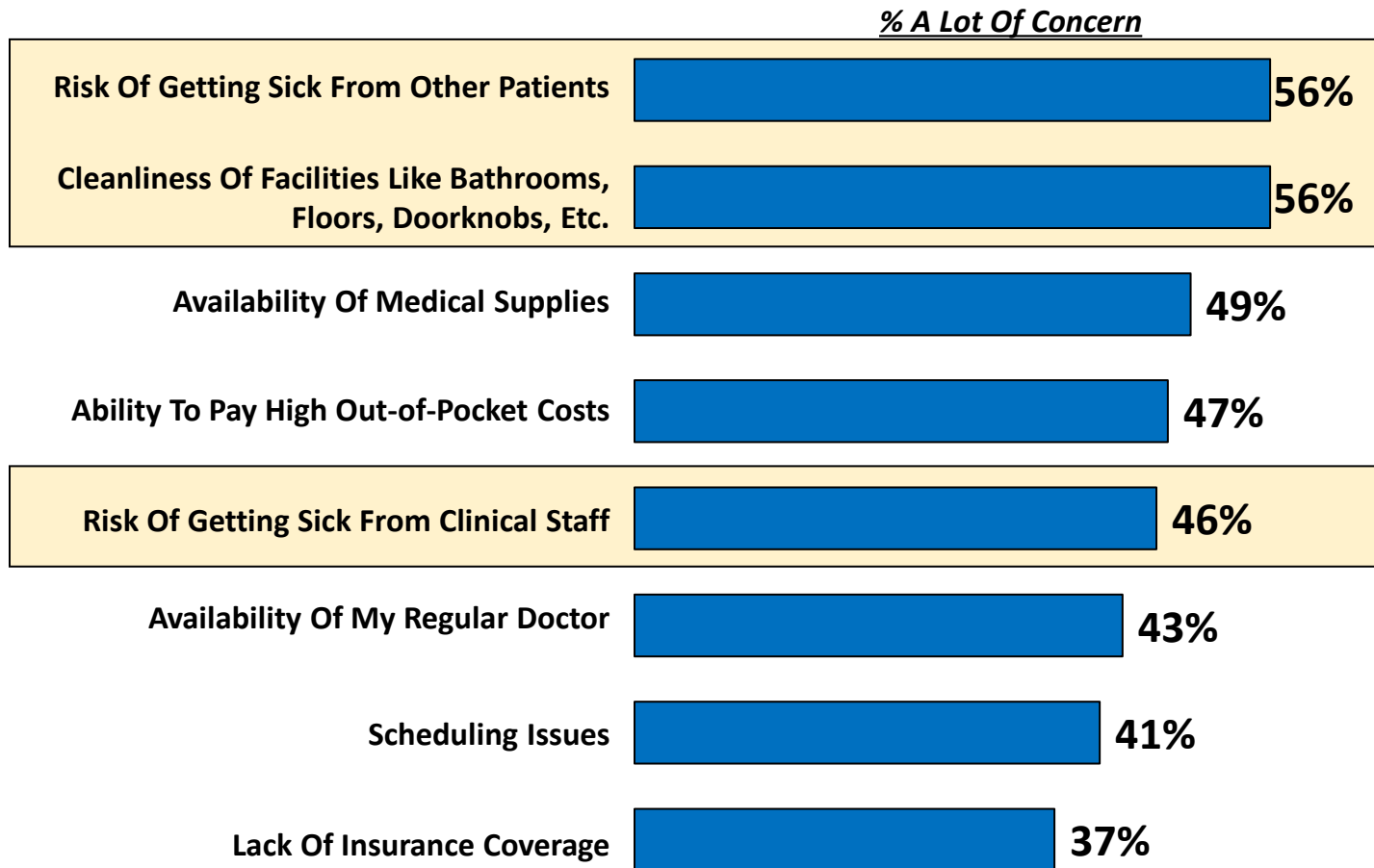
Thinking about any future elective medical procedure in a hospital that you or a family member might need. As of today, are any of the following an obstacle for you in seeking treatment? Please select all that apply.

(Asked Among Those Who Have Not Delayed Or Skipped An Elective Procedure)

	Total
Feeling unsafe in a hospital setting	42%
Loss of employment or income	18%
Change of insurance	8%
Some other reason	2%
None of the above	42%

Infection risks are among the top hesitations Americans have about re-engaging with the medical system.

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



A plurality say a drop in cases will make them feel safer about going into a medical facility. After that are three direct actions providers can take.

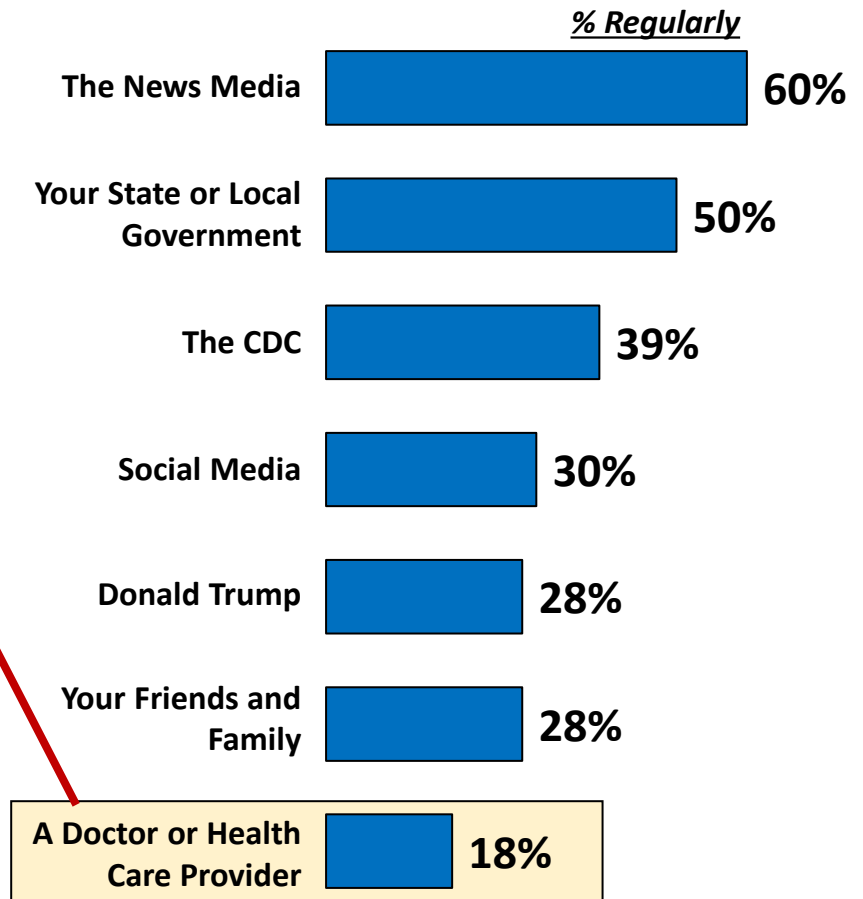
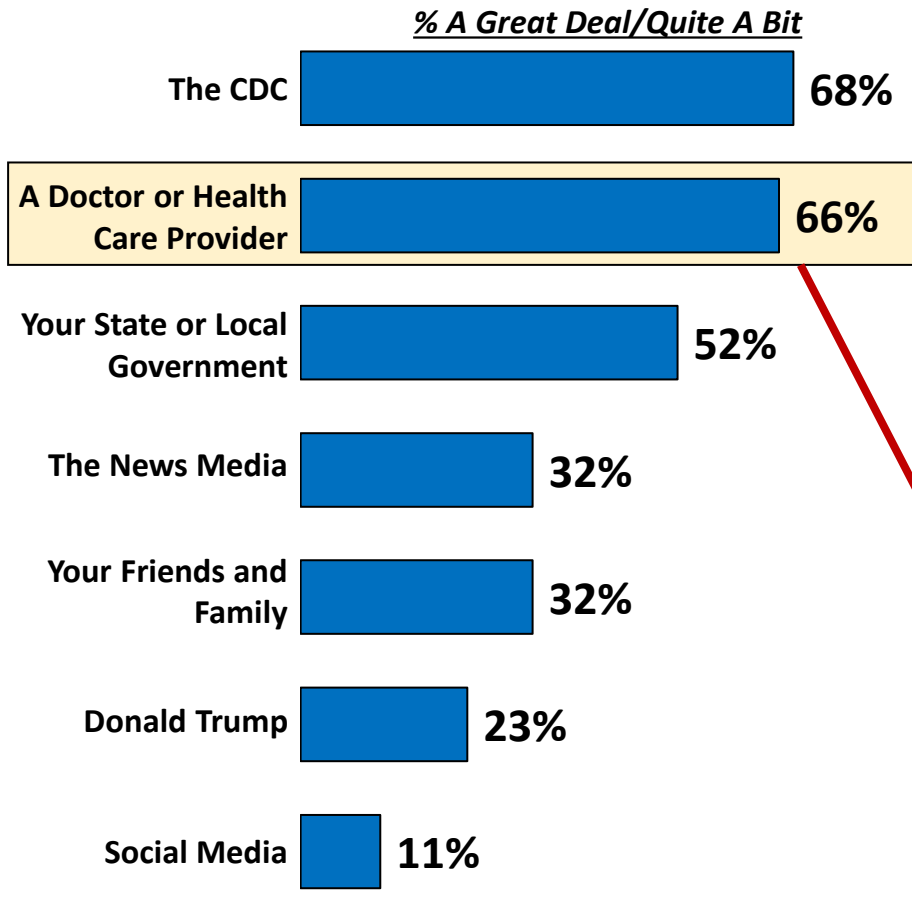
Regardless of how safe you feel today, what are the one or two most important things you could hear that would make you feel safer going to a hospital, urgent care facility or other medical facility as a patient?



Americans are not hearing from providers *nearly* enough.

Regardless of how often you get information from these sources, how much do you trust information provided about the coronavirus outbreak by each of the following...

Thinking about some of the ways you get information about the coronavirus outbreak, would you say that you get information from each of the following sources....



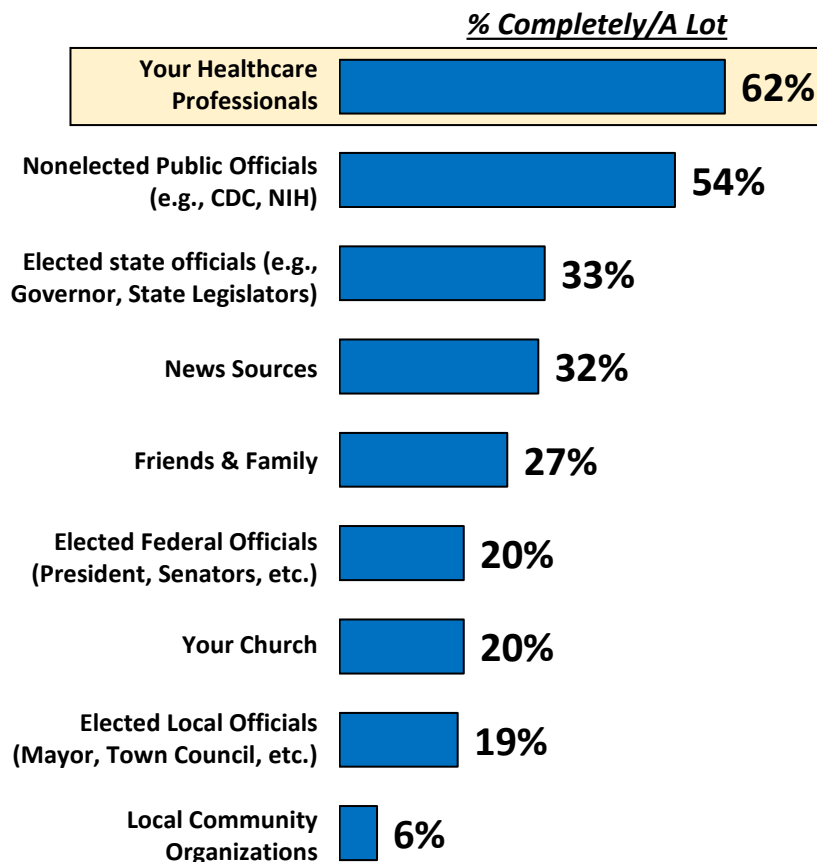
Seniors are skipping care, but few are hearing directly from their providers (despite extremely high levels of trust in them).

(All Data Shown Among Adults Ages 70 and Older)

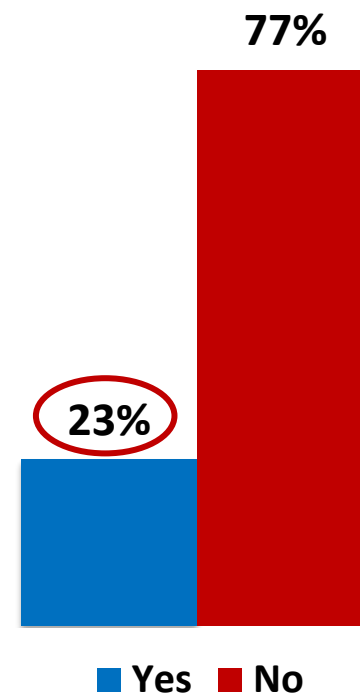
Have you had any of the following changes to your medical care as a result of the coronavirus pandemic?

	% Yes
Delayed or cancelled a non-essential medical treatment that you wanted to have	39%
Delayed or cancelled preventative/primary medical treatment	32%
Delayed or cancelled an essential medical treatment that you needed to have	15%
% Yes To Any of The Above	55%

Thinking about sources of information on the coronavirus pandemic, how much do you trust each of the following sources?



Have any of your health care providers or their staff reached out to you since the start of coronavirus pandemic to check on your well-being, outside of a regularly scheduled appointment?





Financial Impact

Beyond fear, the severe financial impact of the Coronavirus outbreak will undoubtedly disrupt medical care for many Americans.

Have you or has anyone in your household had a change in your employment status due to the coronavirus outbreak?
Please select all that apply.

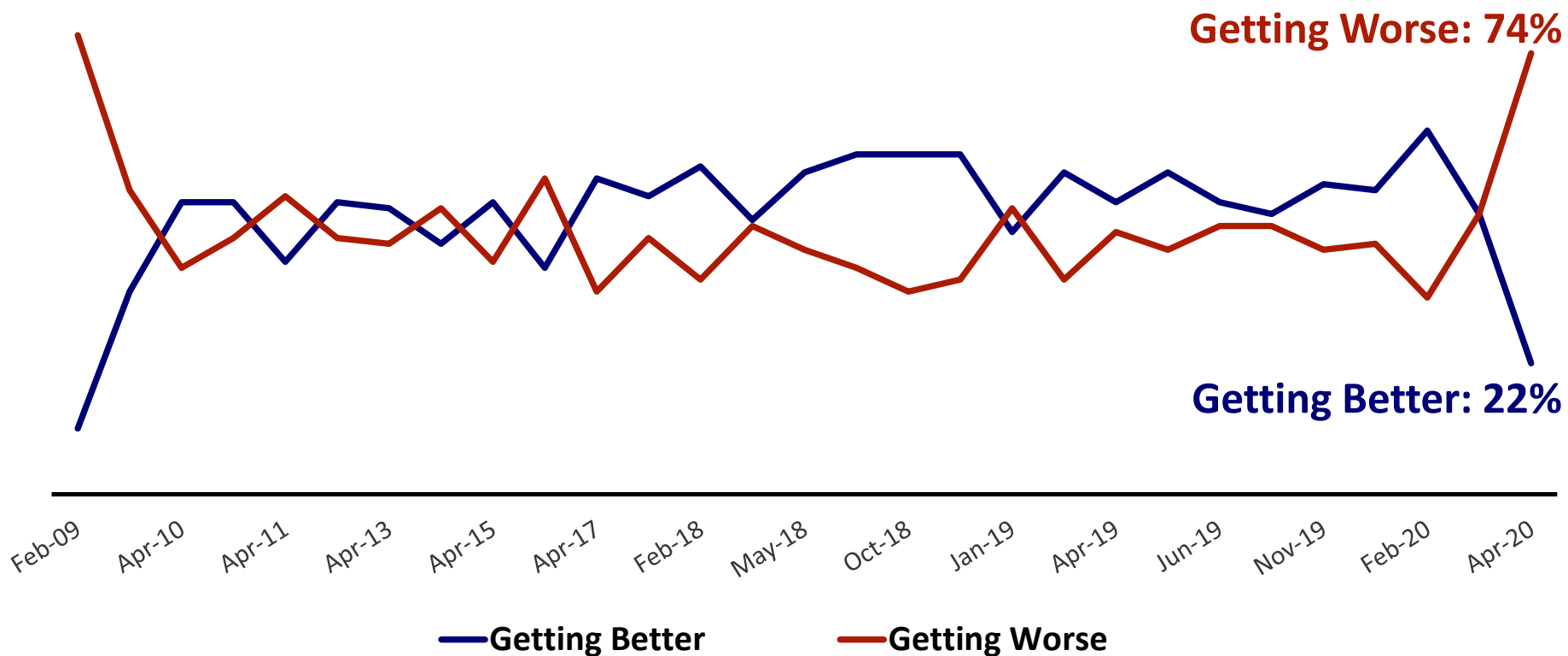
	Total
Total Yes	45%
Yes, you lost your job	15%
Yes, someone else in your household lost their job	12%
Yes, you had your salary or wages cut	15%
Yes, someone else in your household had their wages or salary cut	10%
Total No	55%

And, has the change in employment status resulted in a loss of health insurance?

	Lost Job/ Wages Cut	Total
Yes	26%	12%
No	68%	30%
Unsure	7%	3%

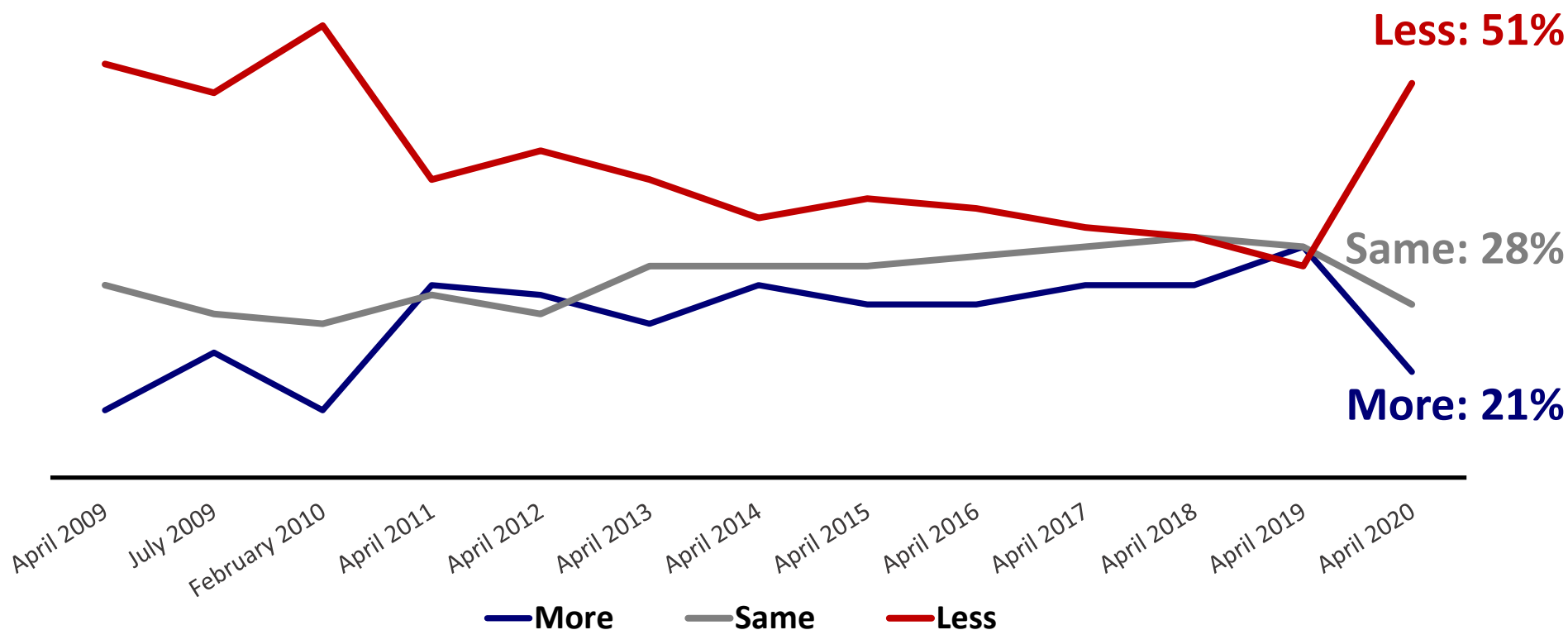
Americans' views of the economy have quickly dropped and could have a significant impact on financial decisions (including medical care).

Right now, do you think that economic conditions in the country as a whole are getting better or getting worse?



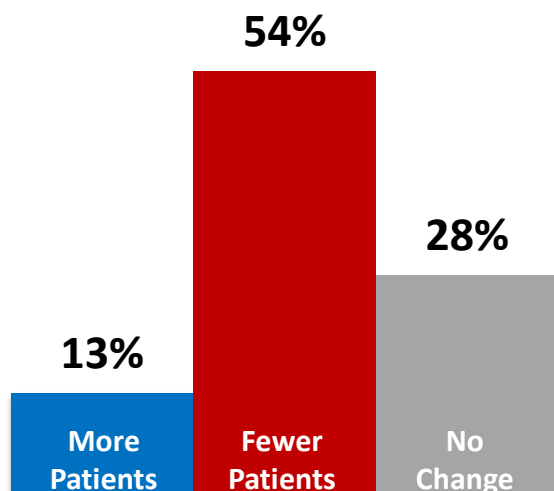
A majority of Americans report spending less money in recent months than they used to, a jump of nearly 20 points from a year ago.

In general, would you say you have been spending more money, the same amount, or less money -- in recent months than you used to?

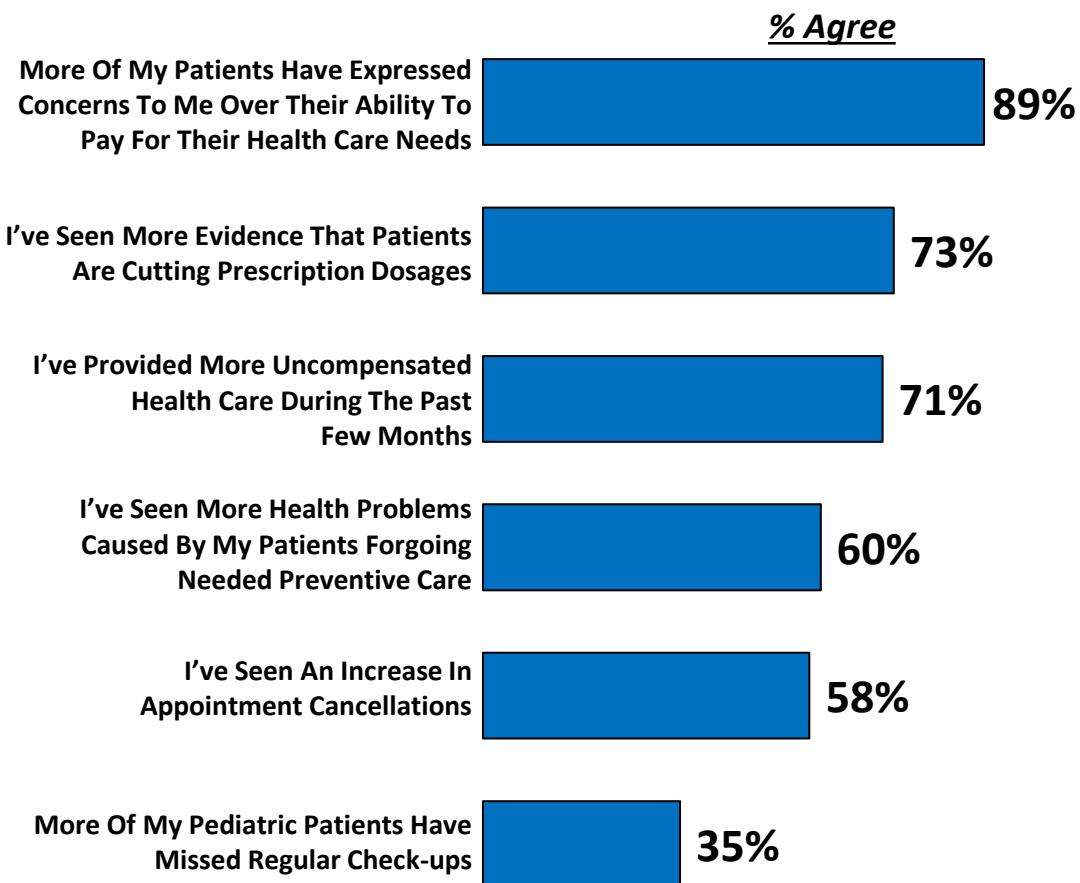


A 2009 national survey of family medicine physicians may illustrate what providers might expect in the months ahead.

Since the beginning of the most recent economic downturn (the past year or so), are you seeing more or fewer patients overall?



Please indicate whether you agree or disagree with the following statements.





Americans' Outlook On The Healthcare System

Americans overwhelmingly approve of how hospitals have handled the response to the Coronavirus outbreak.

Do you approve or disapprove of the way each of the following is handling the response to the coronavirus in the U.S.?

<i>Ranked By % Approve</i>	Approve	Disapprove	D/S
Hospitals In Your Local Area	93%	6%	+87
U.S. Hospitals	92%	6%	+86
Your Employer	89%	9%	+80
Your Child's School Or Daycare	87%	5%	+82
Dr. Anthony Fauci	79%	14%	+65
Government Health Agencies Such As The CDC Or NIH	78%	19%	+59
Your State Government	78%	22%	+56
New York Governor, Andrew Cuomo	67%	25%	+42
Vice President Mike Pence	56%	40%	+16
President Donald Trump	50%	48%	+2
Congress	48%	48%	-0-
The News Media	41%	58%	-17

Views of and trust in providers are through the roof.

Nurses / Doctors / Hospitals

% Favorable

89% / 89% / 86%

% Trust

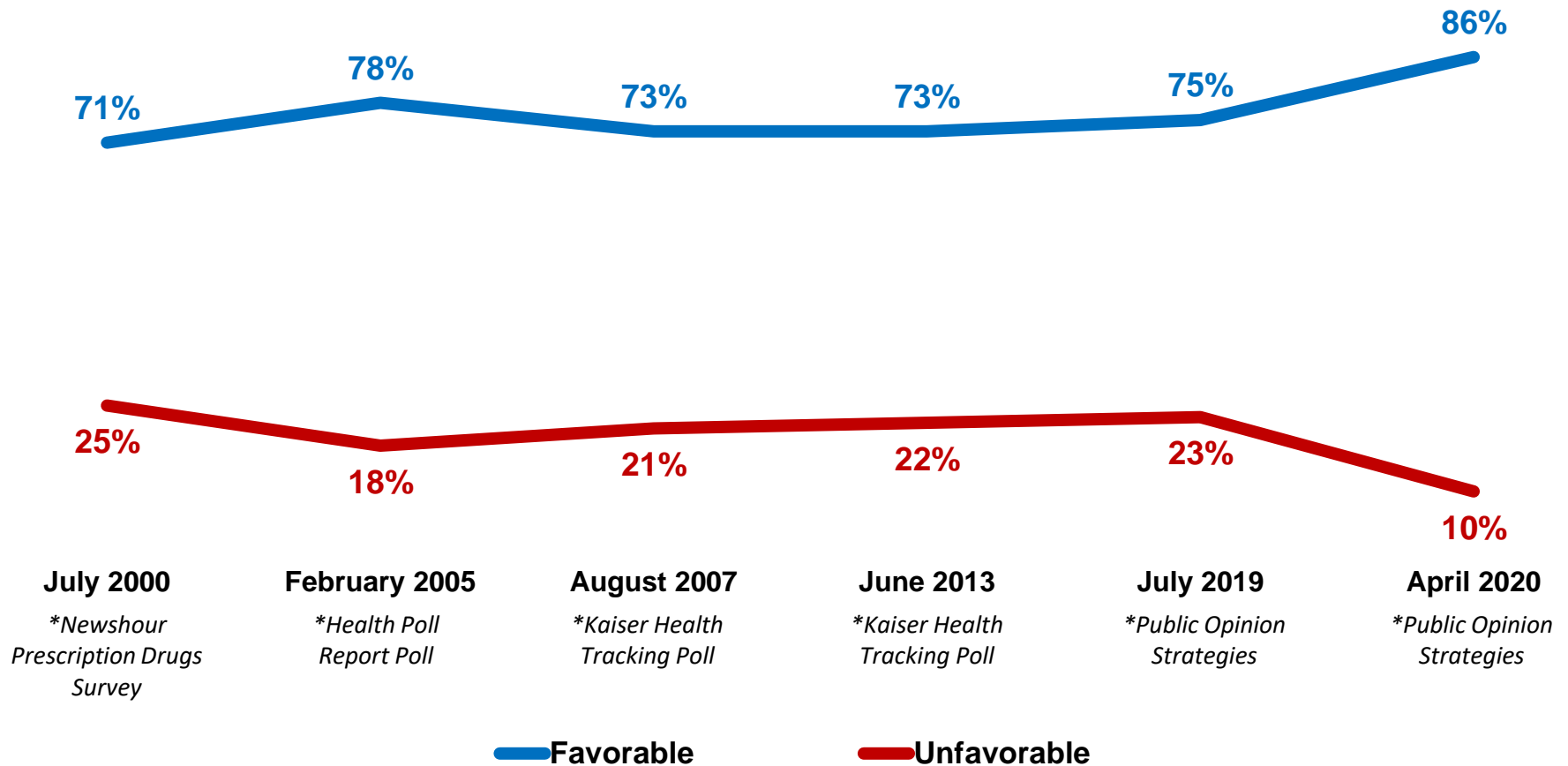
89% / 89% / 86%

% Trust Increase Since Outbreak

73% / 71% / 68%

The image of hospitals is at its highest point over the past two decades.

Below you will see a list of different groups, companies, people and items. For each one please indicate if you have a favorable or an unfavorable opinion.

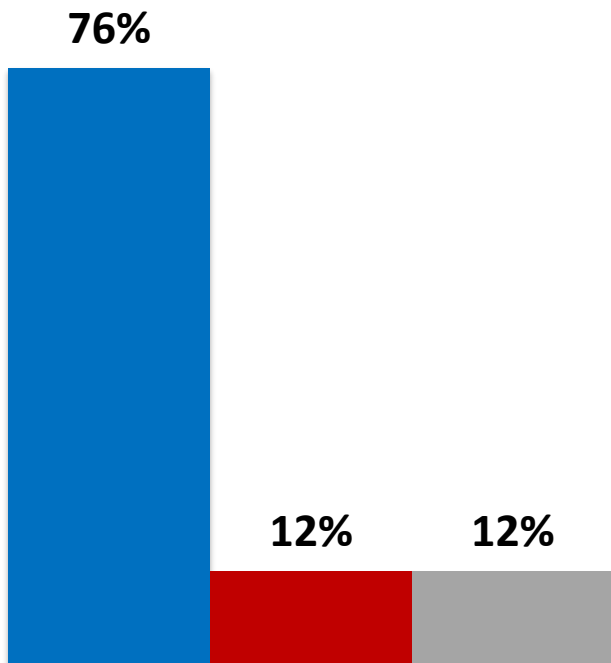


Americans overwhelmingly believe providers are responding well to the outbreak (providers are the highest rated out of 18 industries).

For each of the following industries, do you think that the industry has had a good response or a poor response to the coronavirus pandemic?

Healthcare (Doctors/Nurses/Hospitals)

Total



By Key Groups

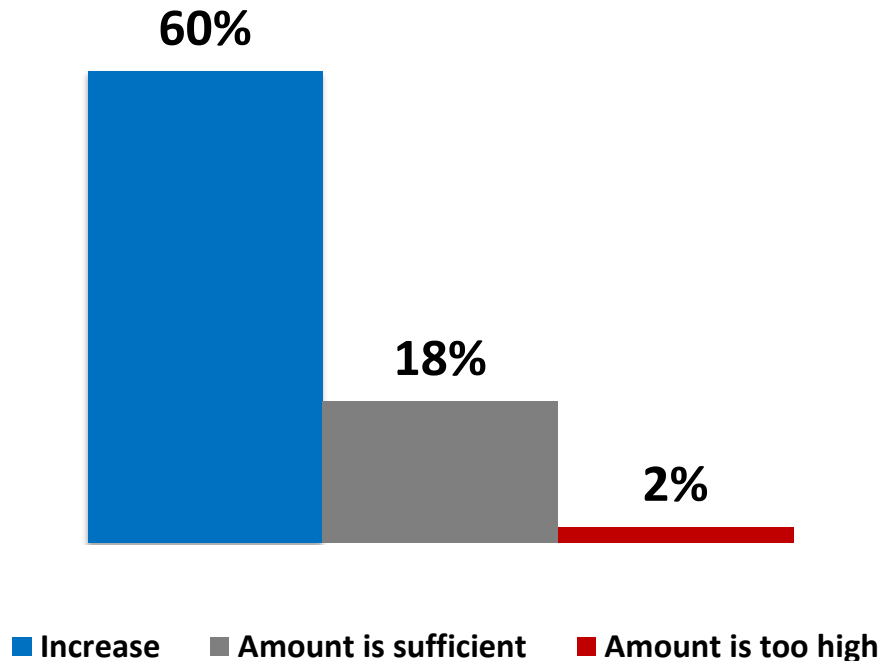
	Men (48%)	Women (52%)	18-34 (30%)	35-64 (24%)	65+ (21%)	GOP (31%)	IND/ Other (30%)	DEM (39%)
Good	72%	80%	63%	78%	92%	79%	73%	76%
Poor	14%	9%	18%	11%	4%	13%	11%	11%
D/S	+58	+71	+45	+67	+88	+66	+62	+65
Not Familiar	13%	11%	19%	11%	4%	8%	16%	12%

■ Good ■ Poor ■ Not Familiar With Industry Response

Americans believe the federal government should increase financial assistance to hospitals.

From the \$2 trillion stimulus package recently passed by Congress and signed by the President, hospitals will receive \$100 billion in emergency funding from the federal government for supplies and medical personnel needed to care for coronavirus patients and for revenue losses driven by the coronavirus outbreak.

Do you think the federal government should increase this level of assistance if there is another stimulus package, or do you think this amount is sufficient to pay for the needs of the hospitals?



I'm going to read you the names of some industries and companies. For each one, I'd like to know how high a priority you think it should be for economic relief assistance from the federal government. Please use a scale from zero to ten. A ten means that company or industry should be a top priority for economic relief assistance from the government, and a zero means it should not be a priority at all.

Ranked by 8-10 Rating	8-10 Rating
Hospitals	87%
Small Businesses	72%
Non-chain Restaurants	48%
Small Local Banks	46%
Retailers	32%
Oil and Gas Companies	28%
Airlines	26%
Chain Restaurants	26%
Large U.S. Banks	26%
Automobile Companies	18%
Boeing	18%
Cruise Companies	7%
Casinos	6%



Potential Changes To Healthcare Delivery

Telehealth users report very high levels of satisfaction with the care they receive.

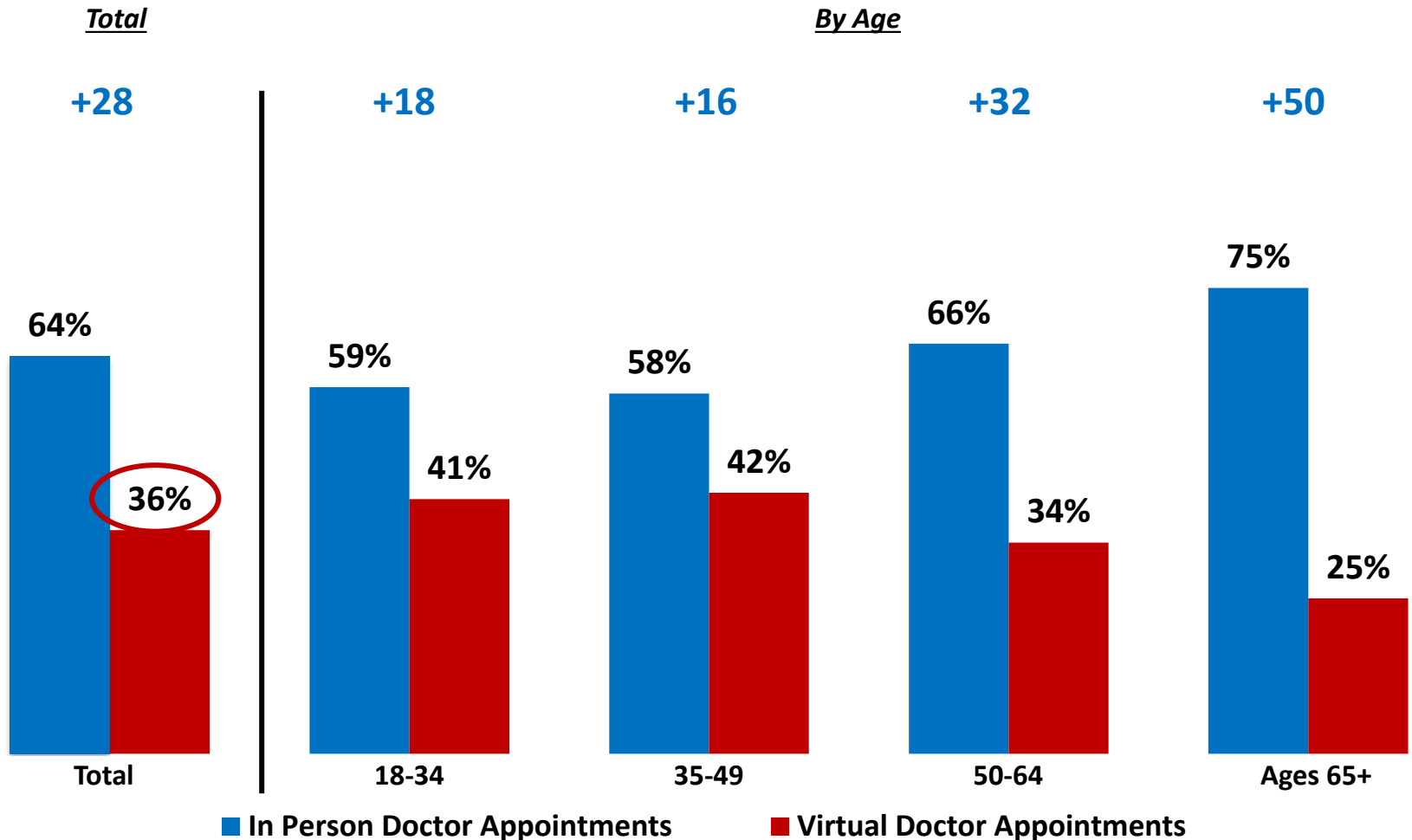
Thinking only about the last time you used Telehealth, how satisfied were you with the care you received...

(Among Those Who Have Used Telehealth, N=251)



And one-third of Americans say they are likely to opt for telehealth visits over in-person visits once the outbreak subsides.

Which are you more likely to do post COVID-19 (e.g., when the economy opens, or the curve is flattened)?

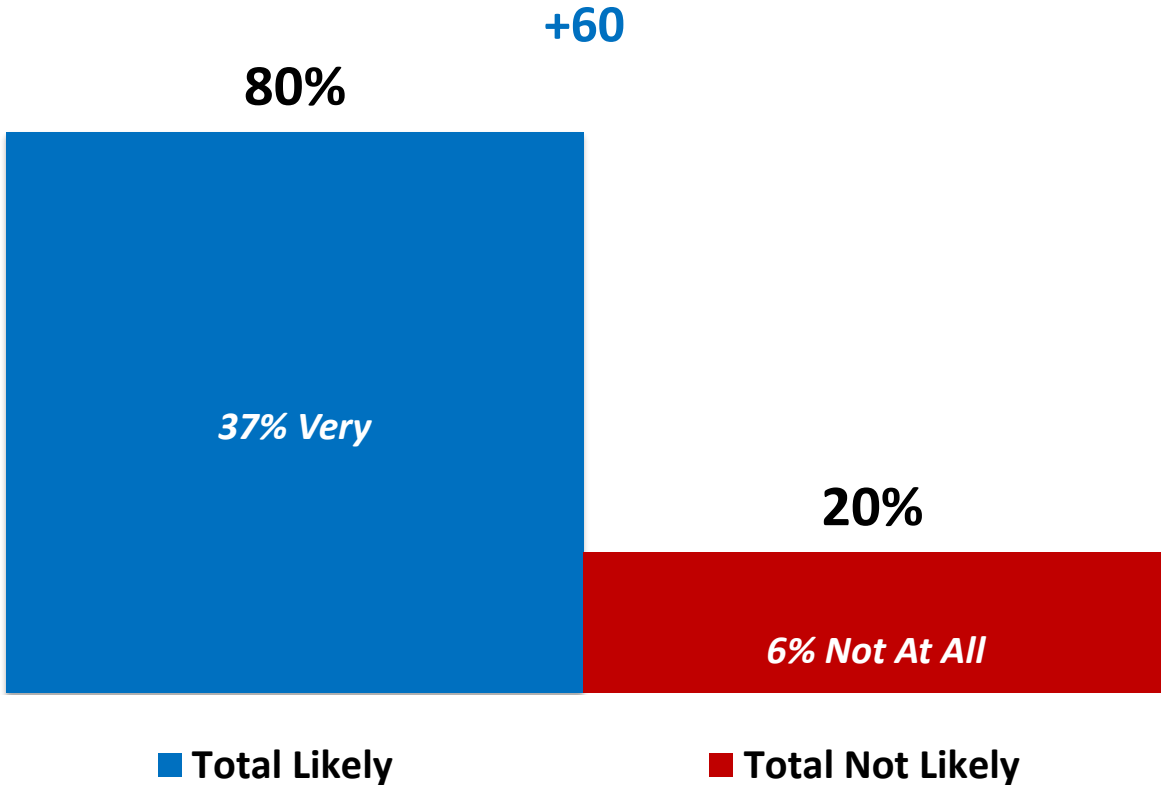


A strong majority of Americans also express interest in home care models.




There is a relatively new form of medical care called "home recovery care" or "hospital at home," where doctors and other medical providers provide hospital-level care in your home for a lot of medical conditions, like Congestive Heart Failure, COPD, pneumonia, and more. This means that you do not have to be admitted to the hospital to be treated for certain conditions, but can recover in the comfort of home with nurses and doctors either visiting you in person or through telehealth.

Now, thinking about yourself... If this kind of care was covered by your insurance, how likely would you be to use it?



Bottom Line




At the epicenter of the Coronavirus outbreak is the U.S. healthcare system, a key economic pillar of the country, has been under the national spotlight. The outbreak has reminded Americans how critical our healthcare system is and it has elevated the image of and trust in healthcare providers, as illustrated nightly in cities around the country like [New York](#), [Atlanta](#) and [San Diego](#).

But while Americans have tremendous support for and trust in healthcare providers, it will take work to build confidence in many around the country to re-engage with the healthcare system. A significant number of Americans are concerned about the safety of medical facilities and have skipped care or are seeking new forms of care (e.g., telehealth). For others, interactions with the healthcare system have been disrupted as a result of the country's economic stoppage.

Despite the many challenges posed by stay-at-home orders and the devastating economic impact, most Americans are not ready to resume normal life. And for some, hesitancy about going out to dinner or sending their child back to school means hesitancy about re-engaging with the healthcare system. Some will skip care out of concern, others out of economic circumstances (we know [high deductibles](#) can lead to people skipping care).

Bottom Line (Cont'd)



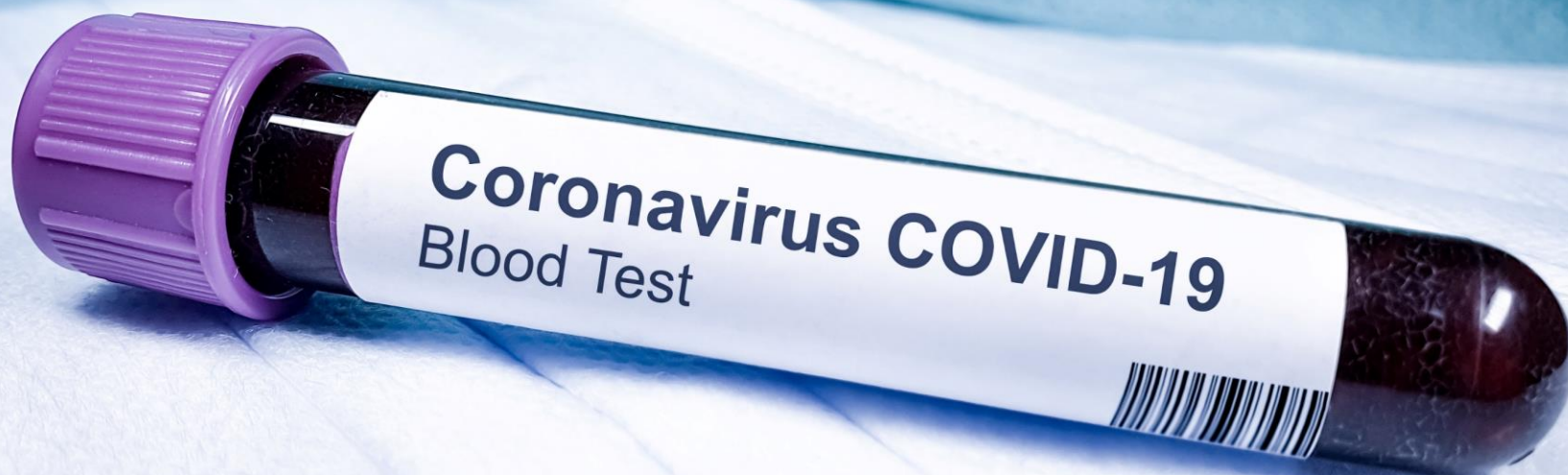
But, there are things providers can do to instill confidence in their patients and the communities in which they serve about re-engagement. Clearly explaining the steps they are taking to reduce the risks of exposure may seem trivial, but most of those who read this have received multiple emails from U.S. airlines about the steps they are taking to increase the safety of flying. As we are seeing in the data, many Americans expect all types of businesses/organizations to take these steps and to clearly and repeatedly communicate that they are taking these steps. Yet, at the moment many Americans are signaling they are not hearing enough from providers.

Some Americans will resume normal activities quicker than others, which includes resuming engagement with the healthcare system. But, for some, it will take more time and healthcare providers will need to work to alleviate the concerns these individuals have so that they can re-engage with the healthcare system and receive the care they need.



PUBLIC OPINION
STRATEGIES

turning questions into answers



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