COVID-19: Provider Trends

July, 2020

PREPARED BY:

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Summary

It would be an understatement to say the outbreak of COVID-19 across the U.S. has had an enormous impact on the health care system and health care providers. In conducting our own client research and tracking a significant amount of publicly available public opinion data over the last four months, we have tracked attitudes on a few trends specific to health care providers. Some are short-term trends and some are long-term trends, but in the following pages are five trends we have tracked public attitudes on we believe are worth sharing with our health care clients.

This is certainly not an exhaustive list and there are other trends that could/will have impact to health care providers that are worth tracking, including:

➢ The impact COVID-19 could have on accelerating the already downward trend of U.S. birthrates (and the resulting impact on 2020/2021 hospital revenues + the impact on the U.S. workforce decades from now).

➢ The impact COVID-19 could have on the growth in remote health care workers, as noted by several prominent health care executives and health system leaders.

➢ The impact COVID-19 could have on personal engagement on health and wellness. Early on we saw signs the pandemic was having an adverse impact on personal health (e.g., increased alcohol consumption, poor diet, etc.), but now we are seeing some reversal. And our country has likely never been this focused on personal health and preventive health measures. Will it last?
Telehealth Is Here To Stay

“The horse is out of the barn. Everybody has to do it. That has changed dramatically. There is no going back.”

-Steven Corwin, M.D., President & CEO, NewYork-Presbyterian

Source: Fortune
COVID-19 has forced a rapid adoption of telehealth – and consumers who have used telehealth LOVE it.

### Telehealth Utilization

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2019</td>
<td>10%</td>
</tr>
<tr>
<td>April 2020</td>
<td>31%</td>
</tr>
</tbody>
</table>

### 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 – April 2020)

- **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%
- **Before 2019**: 18%

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

- **92% Satisfied**

Sources: J.D. Power National Survey of 1,000 Adults, Conducted June 2019; Public Opinion Strategies National Survey of 800 Registered Voters, Conducted April 23-26, 2020;
## Among Physicians...

**In 2015:**
- **80%** Higher Quality Of Care Likely When Patient Sees Physician In Person
- **92%** Of MDs Said Patients Preferred To See Physician In Person
- **48%** Of MDs Said Telehealth Was Not A Good Use Of Time

**In 2020:**
- **57%** Have a More Favorable Impression of Telehealth
- **64%** More Comfortable Using Telehealth
- **61%** Expect to use Telehealth More Post–COVID

### Quotes:

- **Sarah Krevans**, President & CEO, Sutter Health:  
  “I think that ever since there was the capability to do video visits, there have been many of us that have been puzzled on the slow uptake of video visits”

- **Randy Oostra**, DM., President & CEO, ProMedica:  
  “The breakthrough here has been the providers like to do it.”

- **Joanne Conroy**, M.D., President & CEO, Dartmouth-Hitchcock Health:  
  “We have an MA, who calls the patient a day before to make sure that the technical capability of the patient allows for the video or telephone visit. So they do work ahead of time so the provider can move through their list of visits, without technical things getting in the way of taking care of patients.”

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**Sources:** American Academy of Family Physicians National Survey of 1,557 Family Physicians, Conducted January 2015; McKinsey; Fireside Chat Podcast
Providers (and the federal government) have _exponentially_ expanded their capacity to deliver virtual care.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Pre-COVID-19 Telehealth Daily Visits*</th>
<th>COVID-19 Telehealth Daily Visits*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bon Secours Mercy Health</td>
<td>&lt;25</td>
<td>9,000</td>
</tr>
<tr>
<td>Cleveland Clinic</td>
<td>100</td>
<td>6,667</td>
</tr>
<tr>
<td>Centers For Medicare &amp; Medicaid Services</td>
<td>1,714</td>
<td>142,000</td>
</tr>
<tr>
<td>Dartmouth-Hitchcock Health</td>
<td>&lt;1</td>
<td>2,000</td>
</tr>
<tr>
<td>Inova</td>
<td>100-150</td>
<td>3,000</td>
</tr>
<tr>
<td>Johns Hopkins</td>
<td>5</td>
<td>2,860</td>
</tr>
<tr>
<td>Massachusetts General/Brigham</td>
<td>50</td>
<td>8,333</td>
</tr>
<tr>
<td>MedStar Health</td>
<td>1-2</td>
<td>4,000</td>
</tr>
<tr>
<td>Norton Healthcare</td>
<td>8</td>
<td>600</td>
</tr>
<tr>
<td>ProMedica</td>
<td>30</td>
<td>700</td>
</tr>
<tr>
<td>Providence St. Joseph Health</td>
<td>192</td>
<td>10,000</td>
</tr>
<tr>
<td>Sutter Health</td>
<td>50</td>
<td>6,000</td>
</tr>
</tbody>
</table>

*All Data Estimated From Various Interviews
Sources: Various
Telehealth is here to stay.

"The way we look at it is between 30% and 50% of the care, particularly for some specialties, will continue to be done through virtual settings and will be a great thing for our consumers and a great thing for our physicians."

- Tim Pehrson, President & CEO, INTEGRIS

"It’s been a significant explosion. And my hope is that we never go back."

– Stephen Jones, M.D., President & CEO, Inova

“I think our patients have always had the muscle to do telehealth, they’ve just never had to flex it. And COVID made them flex it and made them actually say, hey, I’ve got this I can do it.”

- Russell Cox, President & CEO, Norton Healthcare

“And so we’ve got 900 providers now that have all been trained, and the office staff and we’re actually encouraging folks, especially for routine follow-ups, things like that telemedicine is going to be huge.”

– Stephen Markovich, M.D., President & CEO, OhioHealth

Sources: McKinsey; Fireside Chat Podcast
We Will See Growth In Other Forms Of Care Delivery As Well

“We have a system that makes no sense. We take the sickest, most frail, most vulnerable patients, people who should not be collecting and gathering in one place and we put them all together in one place. We make them travel through a lot of barriers. Getting to a physician’s office is not particularly easy for a lot of the most frail and vulnerable patients. They may have mobility impairments; they may need transportation. All of this for, in most cases, a 5-10 minute interaction with a clinician.”

-Sachin Jain, M.D., CEO, SCAN Group & Health Plan; Former CEO, CareMore Health & Aspire Health
A strong majority of Americans 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?

Source: Public Opinion Strategies/Jarrard Phillips Cate & Hancock National Survey of 1,000 Adults, Conducted April 16-20, 2020; Fireside Chat Podcast
Large (and well-capitalized) companies with national footprints continue to expand their retail medicine presence.

Over the past year, have you, yourself, or a member of your immediate family, received medical care from a clinic inside of a retail store such as CVS, Walgreens, Target or Wal-Mart?

Sources: Health Management Academy / RBC Capital Markets National Survey of 1,500 Adults, Conducted December 11-15, 2015; Public Opinion Strategies National Survey of 805 Adults, Conducted April 23-24, 2019;

Forbes
CVS Health Hub Openings On Track Despite Pandemic
May 7, 2020

Forbes
Walmart Opening More Healthcare ‘Super Centers’
June 17, 2020

The Wall Street Journal
Walgreens to Open Doctors’ Offices at Its U.S. Stores
July 8, 2020
We Will See An Elevated Focus On Health Disparities

“Health is not just about what happens in the hospital. Health is where you live, learn, work, play and pray—and whether you have a home, a job and the community support systems you need along with access to equitable healthcare.”

-Lloyd Dean, CEO, CommonSpirit Health

Source: Modern Healthcare
There has been a sharp uptick in the number of Americans who believe racism & racial discrimination are significant problems.

Do you think that racial and ethnic discrimination in the United States is a problem or not a problem?

% A Big Problem

January 2015: 51%
July 2016: 68%
June 2020: 76%

How big a problem is racism in our society today? Is it a big problem, somewhat of a problem, a small problem, or not a problem at all?

% A Big Problem

Sep 1995: 41%
Oct 1995: 48%
Jul 1996: 54%
Nov 2011: 28%
Oct 2015: 49%
Jun 2020: 67%

Sources: Monmouth National Survey of 807 Adults, Conducted May 28 – June 1, 2020
CNN National Surveys
A majority of Black Americans believe that Black COVID-19 patients have been at a disadvantage to White COVID-19 patients.

For each of the following statements, indicate whether you agree or disagree...

- Black people are less likely than Whites to be offered Coronavirus/COVID-19 testing: Agree 64%, Disagree 32%
- Black people are less likely than Whites to get admitted to the hospital for Coronavirus/COVID-19: Agree 63%, Disagree 34%
- Black people are less likely than Whites to be offered experimental treatments for Coronavirus/COVID-19: Agree 59%, Disagree 37%
- Black people are less likely than Whites to have everything done to save their lives in the hospital: Agree 60%, Disagree 36%

Source: AARC National Survey of 604 African-American Voters, conducted May 1-7, 2020
When it comes to health care, a large number of Americans believe there are racial disparities.

Compared to White Americans, do you think Black Americans are (more likely) or (less likely) to (INSERT ITEM), or is there no difference?

**Receive Poor Quality Health Care**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Among White Respondents</th>
<th>Among Black Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>More Likely</td>
<td>42%</td>
<td>9%</td>
<td>15%</td>
</tr>
<tr>
<td>Less Likely</td>
<td>46%</td>
<td>5%</td>
<td>24%</td>
</tr>
<tr>
<td>No Difference</td>
<td>49%</td>
<td>5%</td>
<td>60%</td>
</tr>
</tbody>
</table>

**Be Able To Access The Health Care They Need**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Among White Respondents</th>
<th>Among Black Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>More Likely</td>
<td>44%</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Less Likely</td>
<td>45%</td>
<td>7%</td>
<td>25%</td>
</tr>
<tr>
<td>No Difference</td>
<td>63%</td>
<td>12%</td>
<td>25%</td>
</tr>
</tbody>
</table>

*Source: Kaiser Family Foundation National Survey of 1,296 Adults, Conducted June 8-14, 2020*
In terms of different policies to promote equality, ensuring health equity receives the strongest support.

- **29%** of Americans support federal reparations
- **47%** of Americans believe police need major reforms and restructuring
- **69%** Of Americans believe the criminal justice system needs a complete overhaul or major changes
- **71%** Of Americans believe it should be a top/high priority that the U.S. ensures health equity for every American

Sources: AP-NORC National Survey of 1,286 Adults, Conducted September 20-23, 2019; Harvard-Harris National Survey of 1,886 Registered Voters, Conducted June 17-18, 2020; AP-NORC National Survey of 1,310 Adults, Conducted June 11-15, 2020; Public Opinion Strategies National Survey of 1,002 Registered Voters, Conducted September 7-19, 2019
There will be a significant increase in efforts to address health disparities and the social determinants of health.

- Social services are becoming health care services. An individual’s mental and social well-being have always been key components of total health. However, the infrastructure responsible for social and mental health has long been fragmented and not fully integrated with hospitals, physicians, and other traditional health care providers.

- Pre-COVID, this landscape was already beginning to shift in meaningful ways:
  - Health plans and government payers (e.g., North Carolina) were beginning to explore and implement ways to directly pay community-based organizations and other social service providers
  - In the 2020 Physician Fee Schedule Final Rule, Medicare established a new Part B benefit for services provided to patients with an opioid addiction, in addition to creating a new bundled payment for patients addicted to opioids

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UnitedHealthcare and the AMA are developing new billing codes for social determinants of health

House Democrats aim to tackle racial health disparities linked to disproportionate Covid-19 deaths

36 Chicago-area hospitals name racism a ‘public health crisis’

“The healthcare system will need to address some of these issues, whether it’s health disparities, social justice issues, etc. We exist for the public benefit.”

--Steven Corwin, M.D., President & CEO, NewYork-Presbyterian

Sources: Nathan Bays; Fireside Chat Podcast
CMS is announcing several actions based on newly released Medicare claims data that shows that seniors & those w/ chronic health conditions are at the highest risk for #COVID19 & confirms disparities in health outcomes for racial & ethnic minority groups & low-income populations.

The #Medicare claims data confirms long understood & stubbornly persistent disparities in health outcomes for racial & ethnic minority groups, & calls for focused attention across the healthcare system. 2/9
cms.gov/newsroom/press...

4:36 PM · Jun 22, 2020 · Twitter Web App

It is clear that our fee-for-service system is insufficient for the most vulnerable Americans because it limits reimbursement to what goes on inside a doctor’s office. The transition to a value-based system has never been so urgent. 4/9

cms.gov/newsroom/press...

4:45 PM · Jun 22, 2020 · Twitter Web App
“Pandemic Ready” Will Drive Operational Changes

“I think this has taught us that five years from now or two years from now, when the next issue hits, we will have processes in place that we can roll out much more easily.”

-Redonda Miller, M.D., President, The Johns Hopkins Hospital
At the outset, Americans were overwhelmingly concerned about infection risks in medical settings and about hospital supplies...

84% of Americans expressed concern with being exposed to coronavirus at a doctor’s office or hospital

(March 28-April 2)

78% of Americans expressed concern their local hospital would run out of necessary equipment like beds or ventilators

(March 25-20)

64% of Americans were very/moderately worried about the availability of hospital supplies/services

(April 6-12)

63% of Americans believed hospitals did not have what they needed to fight to COVID-19 crisis

(April 14-16)

Sources: Gallup, Kaiser Family Foundation, Harris Poll
...which is likely why we saw such a significant drop in engagement with the health care system.

During The First 10 Weeks Of The COVID-19 Pandemic

42%
Decline in ED utilization

23%
Decline in patients seeking care for heart attack

20%
Decline in patients seeking care for stroke

86% - 94%
Decline in appointments for screenings for cervix, colon and breast cancers

“Perhaps what the best thing that will come out of this is that as we need to scale up or scale down our degree of specificity to be able to enact that kind of scaling, to the need of the day without over scaling one way or the other, I think will be much more specific.”

– Chris Howard, President & CEO, Sharp HealthCare

“A lot of people are really focused on physical safety (of hospitals), but there’s so much psychological and emotional safety baked into it.”

– Sonal Singh, CEO, Spatio Metrics

Sources: Centers For Disease Control and Prevention; Epic; Fireside Chat Podcast
 Providers Are Positioned To Lead On Vaccine Education

“In addition to the work we have to do on science, we'll have to put an equal effort forward on education to the public on vaccinations and this vaccine. We have had conversations with governments, even working with the distribution systems to make this a seamless process to that end consumer so that they have confidence, so that the have safety information and data that makes them trust it.”

-Alex Gorsky, Chairman & CEO, Johnson & Johnson
Before the COVID-19 pandemic, we were seeing a decline in attitudes about the importance of vaccines.

How important is it that parents get their children vaccinated? (% Extremely/Very Important)

- June 2001: 94%
- December 2019: 84%

Thinking about the common vaccines available today such as polio, tetanus, measles, and flu, how important do you believe vaccines are to the health of our society today? % Very Important

- November 2008: 80%
- May 2018: 70%

Sources: Gallup National Surveys & Research America National Surveys
A large number of Americans are unwilling or uncertain to get an (eventual) COVID-19 vaccine.

If a vaccine against the coronavirus becomes available, do you plan to get vaccinated, or not?

- Yes: 49%
- No: 20%
- Not Sure: 31%

Do you plan to get a vaccine shot against coronavirus when a vaccine becomes available, or not?

- Yes: 60%
- No: 23%
- Don’t Know: 16%

Sources: AP-NORC National Survey of 1,056 Adults, Conducted May 14-18, 2020; Fox News National Survey Of 1,207 Registered Voters, Conducted May 17-20, 2020
There are notable differences in COVID-19 vaccine attitudes between key subgroups. The top concern expressed by those unwilling is over potential side effects.

If a vaccine against the coronavirus becomes available, do you plan to get vaccinated, or not?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>49%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Men</td>
<td>65%</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Women</td>
<td>49%</td>
<td>17%</td>
<td>34%</td>
</tr>
<tr>
<td>18-39</td>
<td>40%</td>
<td>24%</td>
<td>35%</td>
</tr>
<tr>
<td>40-59</td>
<td>44%</td>
<td>19%</td>
<td>36%</td>
</tr>
<tr>
<td>60+</td>
<td>67%</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>White</td>
<td>56%</td>
<td>16%</td>
<td>27%</td>
</tr>
<tr>
<td>Black</td>
<td>25%</td>
<td>40%</td>
<td>32%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>37%</td>
<td>23%</td>
<td>37%</td>
</tr>
<tr>
<td>Democrat</td>
<td>62%</td>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>Republican</td>
<td>43%</td>
<td>26%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: AP-NORC National Survey of 1,056 Adults, Conducted May 14-18, 2020
As we have seen throughout the COVID-19 outbreak (and before), Americans have enormous trust in health care providers, suggesting an opportunity for them to help build support for taking the vaccine.

How trustworthy do you think each of the following sources are to provide accurate information regarding the coronavirus outbreak?

<table>
<thead>
<tr>
<th>Source</th>
<th>% Trustworthy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctors &amp; Nurses</td>
<td>86%</td>
</tr>
<tr>
<td>Scientists</td>
<td>78%</td>
</tr>
<tr>
<td>Local County Agencies / Health Departments</td>
<td>75%</td>
</tr>
<tr>
<td>Medical Journals</td>
<td>75%</td>
</tr>
<tr>
<td>Friends and Family</td>
<td>74%</td>
</tr>
<tr>
<td>CDC</td>
<td>73%</td>
</tr>
<tr>
<td>My Local Government</td>
<td>67%</td>
</tr>
<tr>
<td>My Governor</td>
<td>63%</td>
</tr>
<tr>
<td>International Health Organizations (e.g., WHO)</td>
<td>62%</td>
</tr>
<tr>
<td>Local Media</td>
<td>59%</td>
</tr>
<tr>
<td>Government PSA’s / Websites</td>
<td>58%</td>
</tr>
<tr>
<td>National Media</td>
<td>52%</td>
</tr>
<tr>
<td>The White House / President</td>
<td>49%</td>
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<tr>
<td>My Employer</td>
<td>47%</td>
</tr>
<tr>
<td>Social Media</td>
<td>36%</td>
</tr>
</tbody>
</table>

“We have a lot of work to do because there is a general anti-science, anti-authority, anti-vaccine feeling among some people in this country, an alarmingly large percentage of people”

- Anthony Fauci, M.D., Director, National Institute of Allergy and Infectious Diseases

Source: Gallup National Survey of 1,016 Adults, Conducted April 14-28, 2020