



COVID-19 Consumer Behavior

Key Findings and Takeaways from Wave 1 of
the Optum Consumer Pulse Survey

May 14, 2020



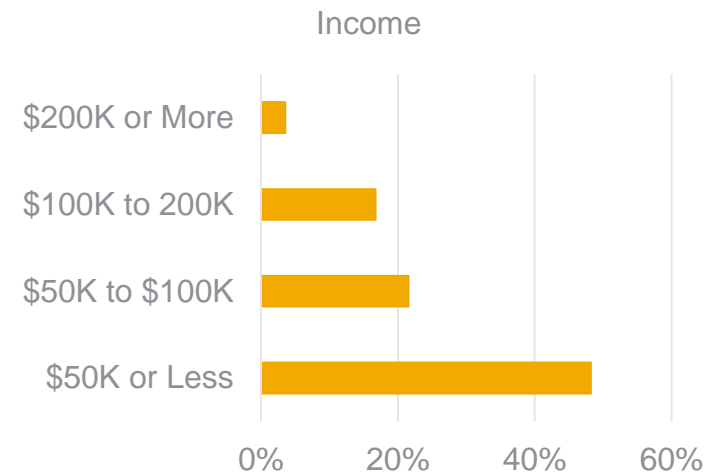
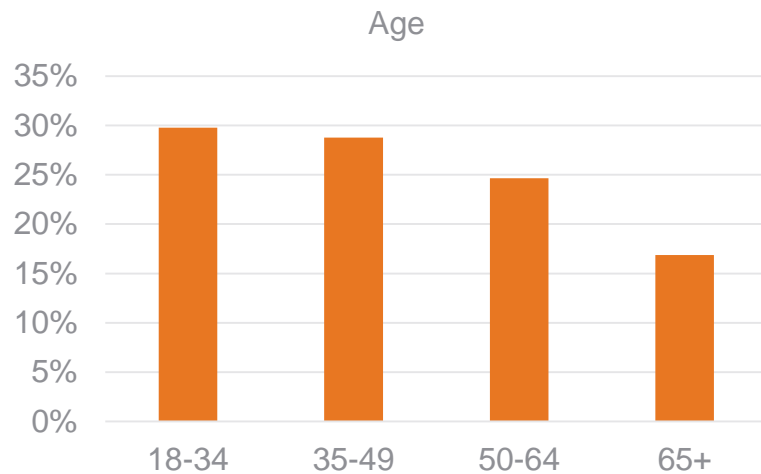
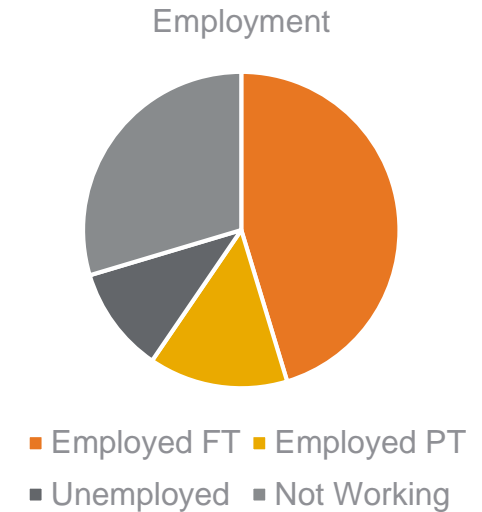
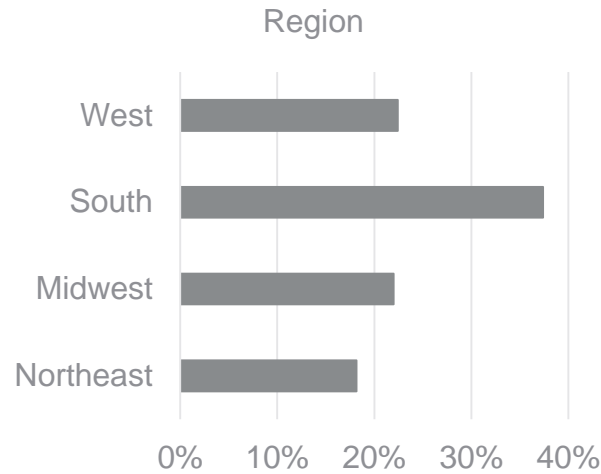
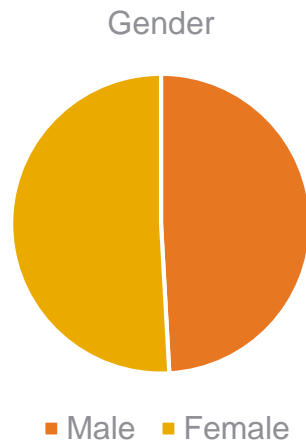
Overview of the Optum COVID Concern Index

Key findings and takeaways from wave 1

- 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 some 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 represents the findings from Wave 1 of a six-part research series. Upcoming surveys will be conducted the weeks of May 18, June 1, June 15, June 29, 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 predicative 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 respondent profiles. Categorized for ease of use. Details available on request. N = 700



Key Findings and Takeaways

Majority of consumers unlikely to show up for a previously scheduled medical procedure in a hospital today

- Two in three consumers (66%) are likely to **reschedule or postpone a medical procedure in a hospital** that was scheduled for today
- While women are slightly more likely than men to postpone a procedure overall, women 65+ are almost 3x more likely (37% vs 13%) than men in the same age group to say they **would “definitely” postpone a procedure**
- Half of consumers (50%) are **unlikely to show up for an elective procedure in a hospital** that was scheduled for today
- And almost half (48%) are **unlikely to use an outpatient facility** for an elective procedure

Key Findings and Takeaways CONTINUED

Significant number of consumers would avoid emergency care today, even if it were for life threatening symptoms

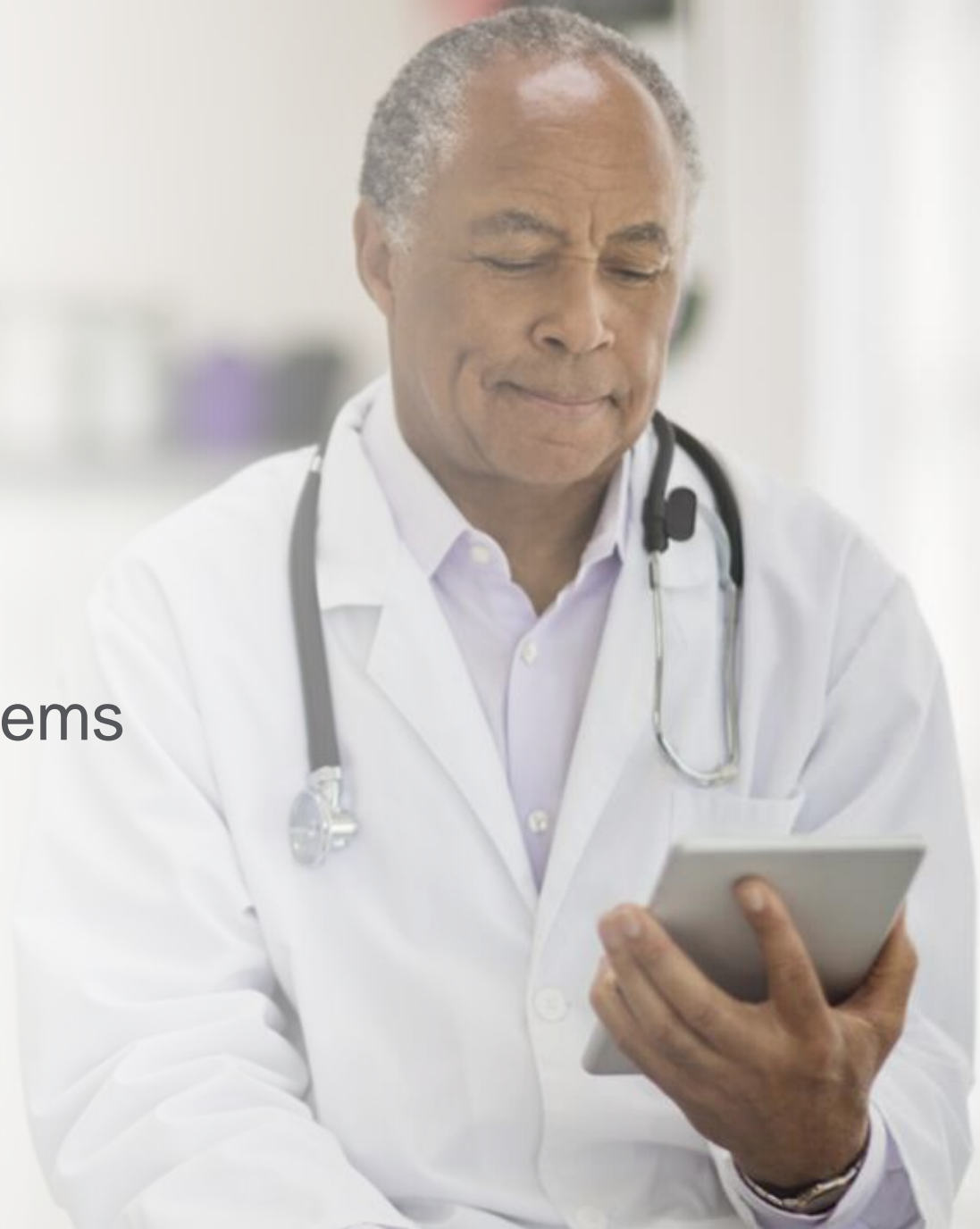
- Almost one in five consumers (18%) are **likely to avoid the ED despite showing signs of a heart attack or appendicitis**
- Another 40% are **likely to avoid the ED despite a cut that may require stitches**
- And **among those who are unemployed**, almost one in three (32%) would avoid the ED even for life threatening symptoms
- Even fewer consumers **would use an urgent care center** or other freestanding medical center for a minor illness or injury (52% are unlikely to use)

Key Findings and Takeaways CONTINUED

Consumers more willing to seek care in a physician's office today, but would prefer virtual

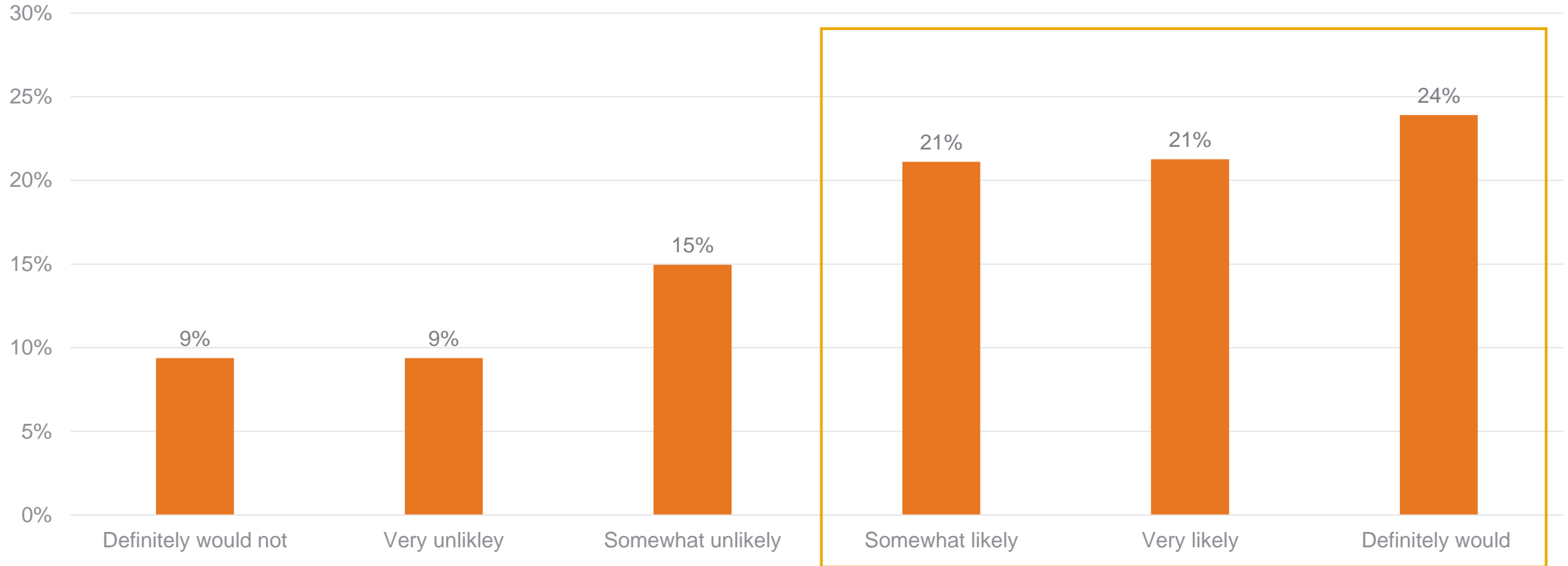
- 59% of consumers are **likely to keep a previously scheduled doctor's appointment**
- But 66% with a scheduled physician appointment are **more likely to use telehealth**
- **Women especially are more likely to use telehealth** (73% of women vs. 59% of men say they are likely to use)

Use of Hospitals and Health Systems



66% 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?

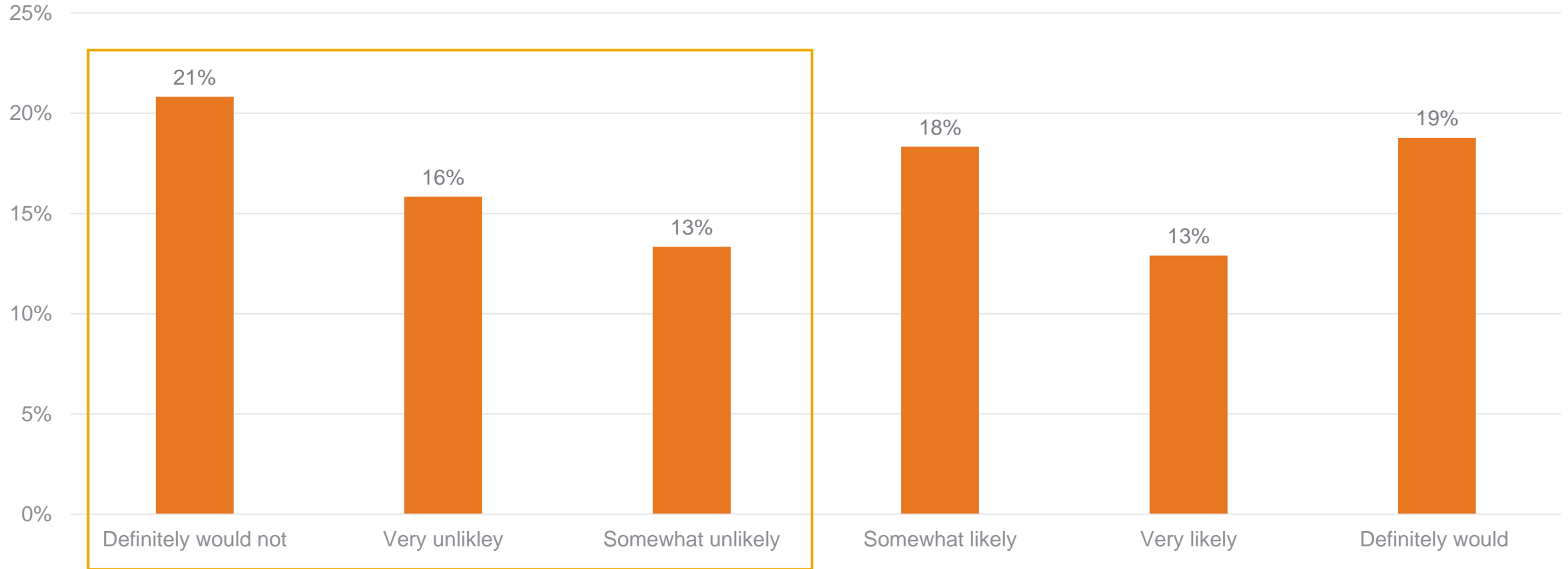


Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020



50% 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?

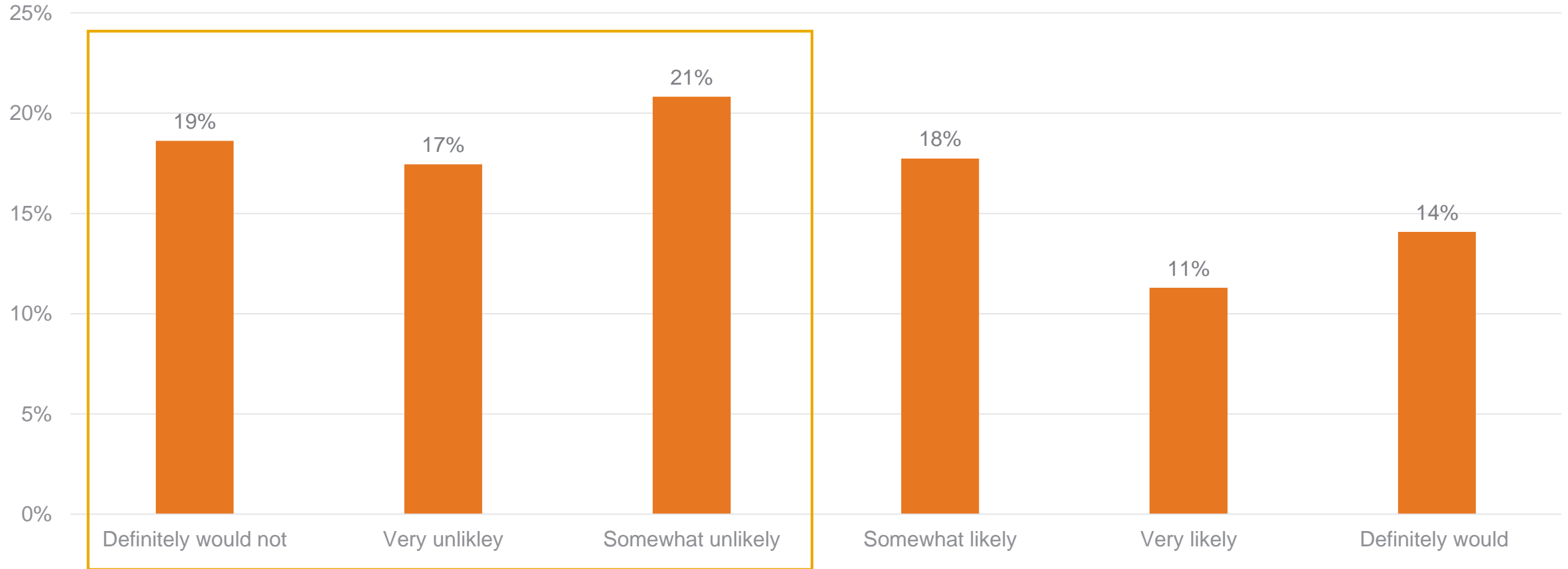


Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020



57% unlikely to visit a friend or family member in the hospital today

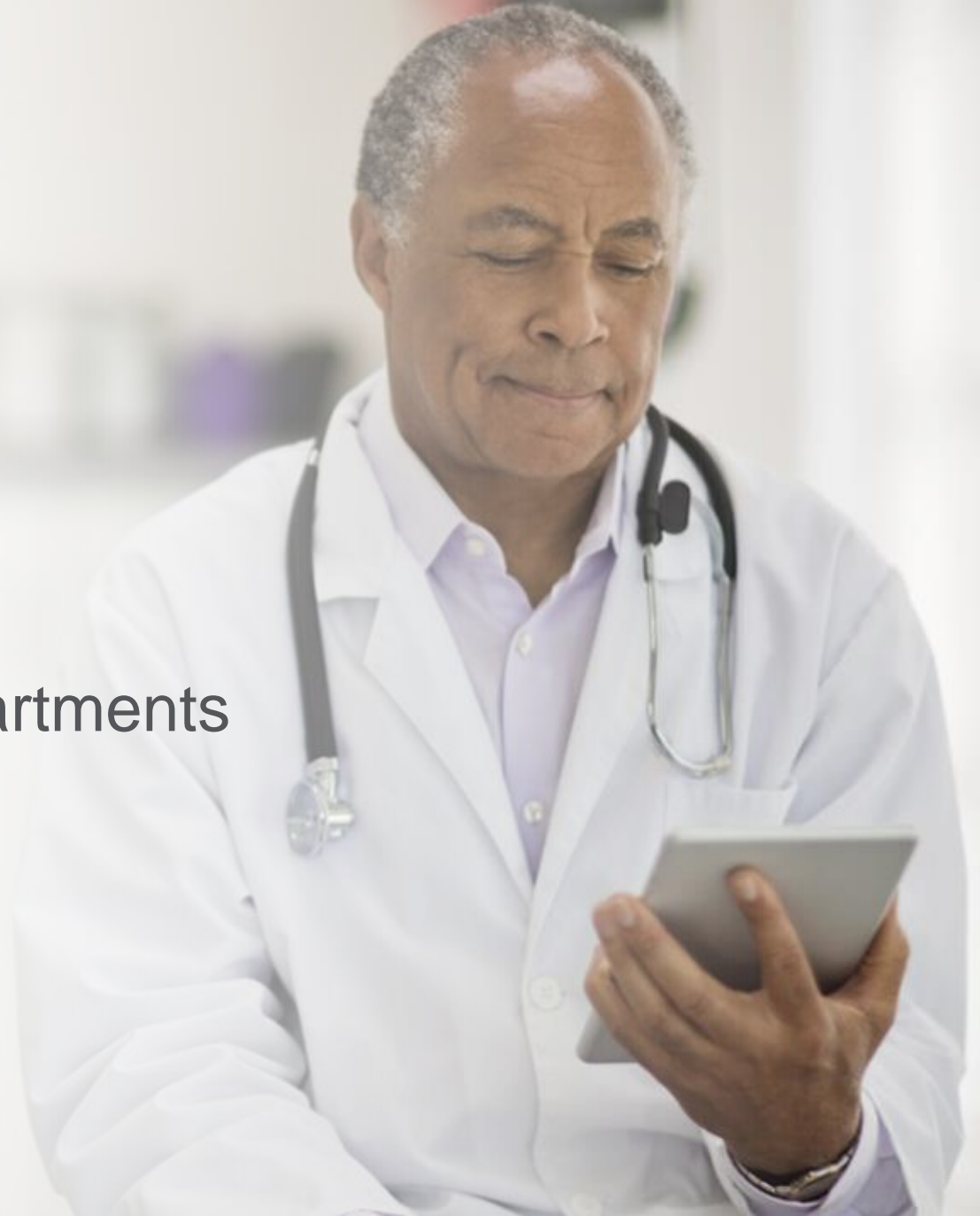
If a friend or family member were in the hospital today, how likely would you be to visit them?



Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020

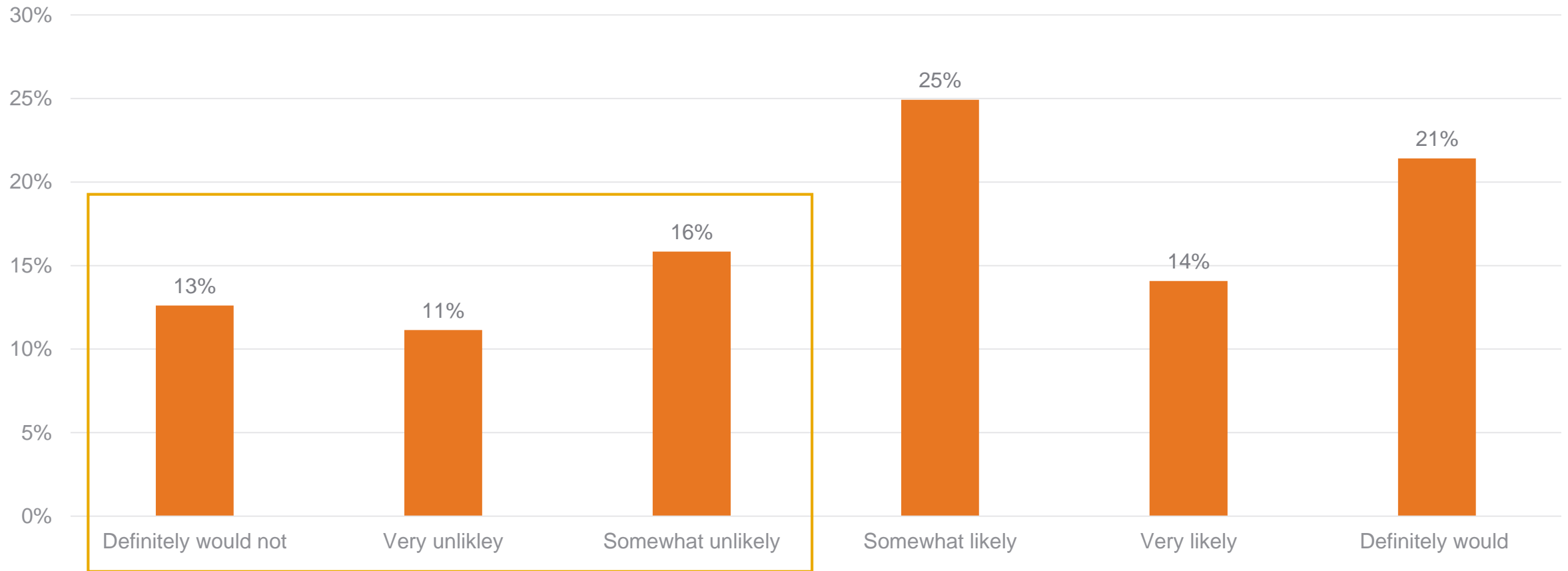


Use of Hospital Emergency Departments



40% 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?

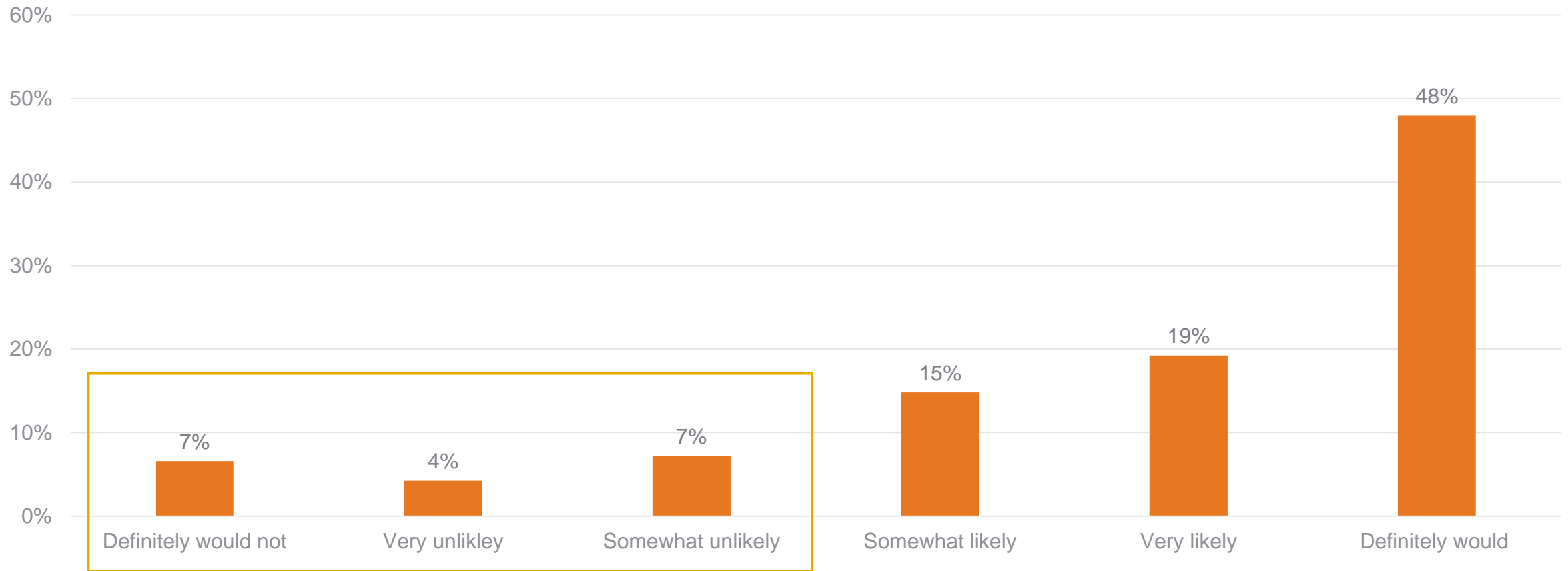


Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020



18% unlikely to use an ER for a “major” illness today

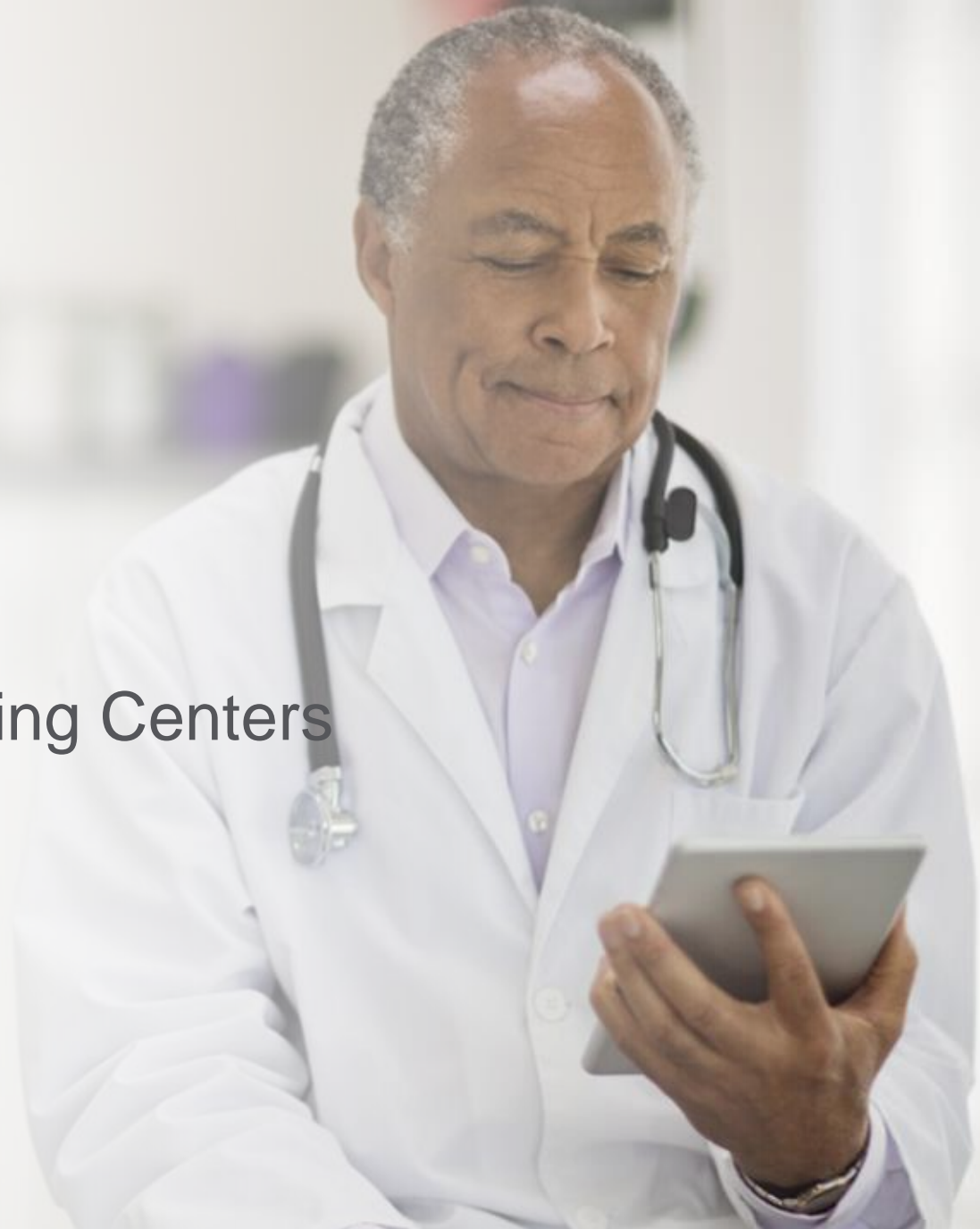
How likely are you to go to a hospital emergency room if you show symptoms of a heart attack or appendicitis today?



Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020

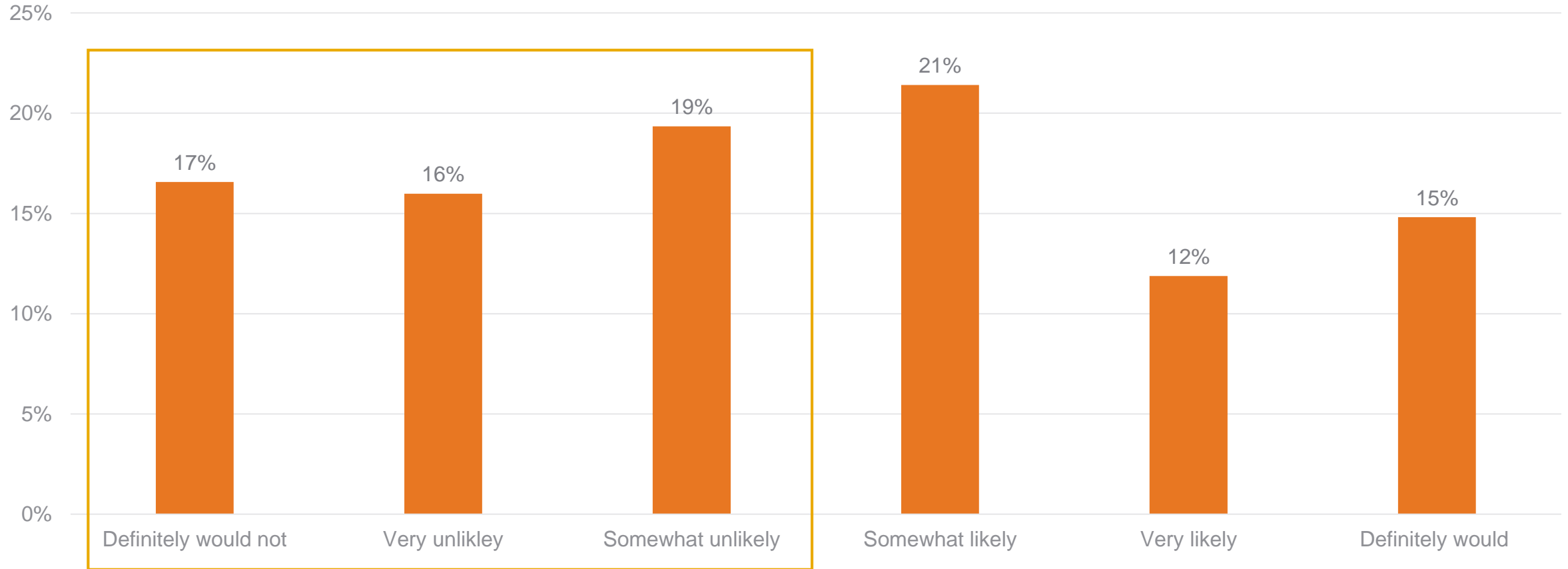


Use of Outpatient and Freestanding Centers



52% 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?

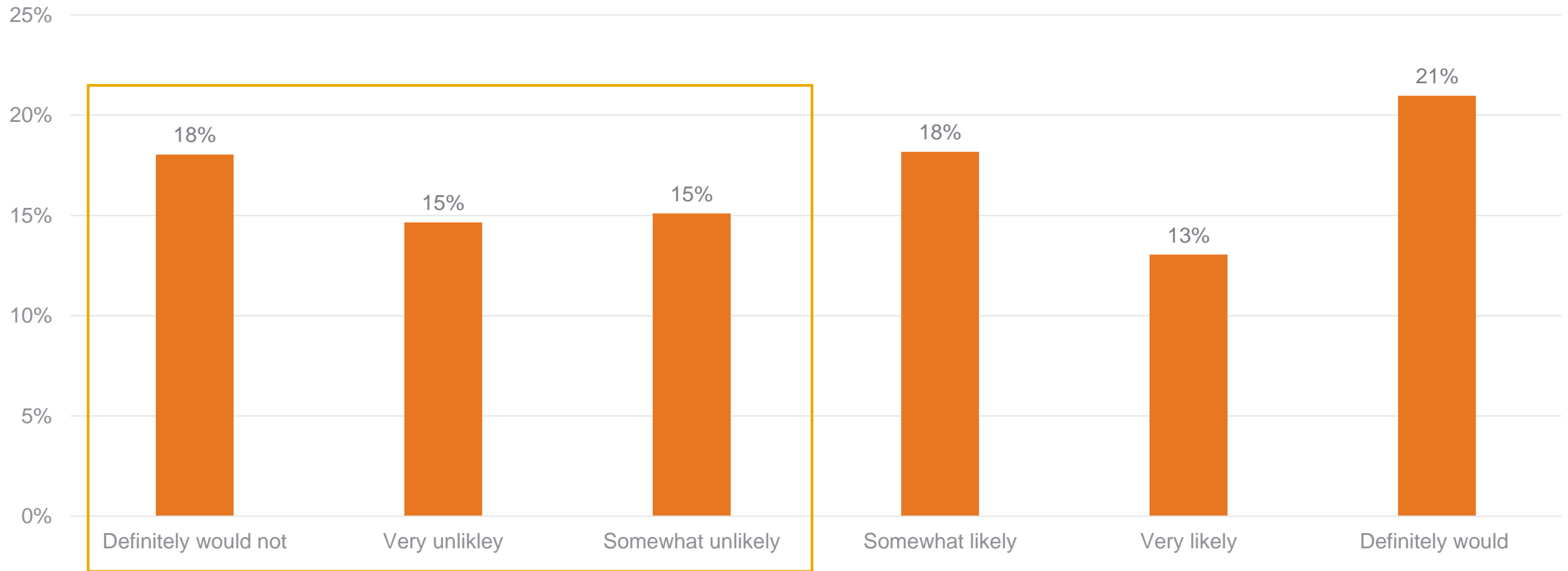


Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020



48% unlikely to use an outpatient facility today

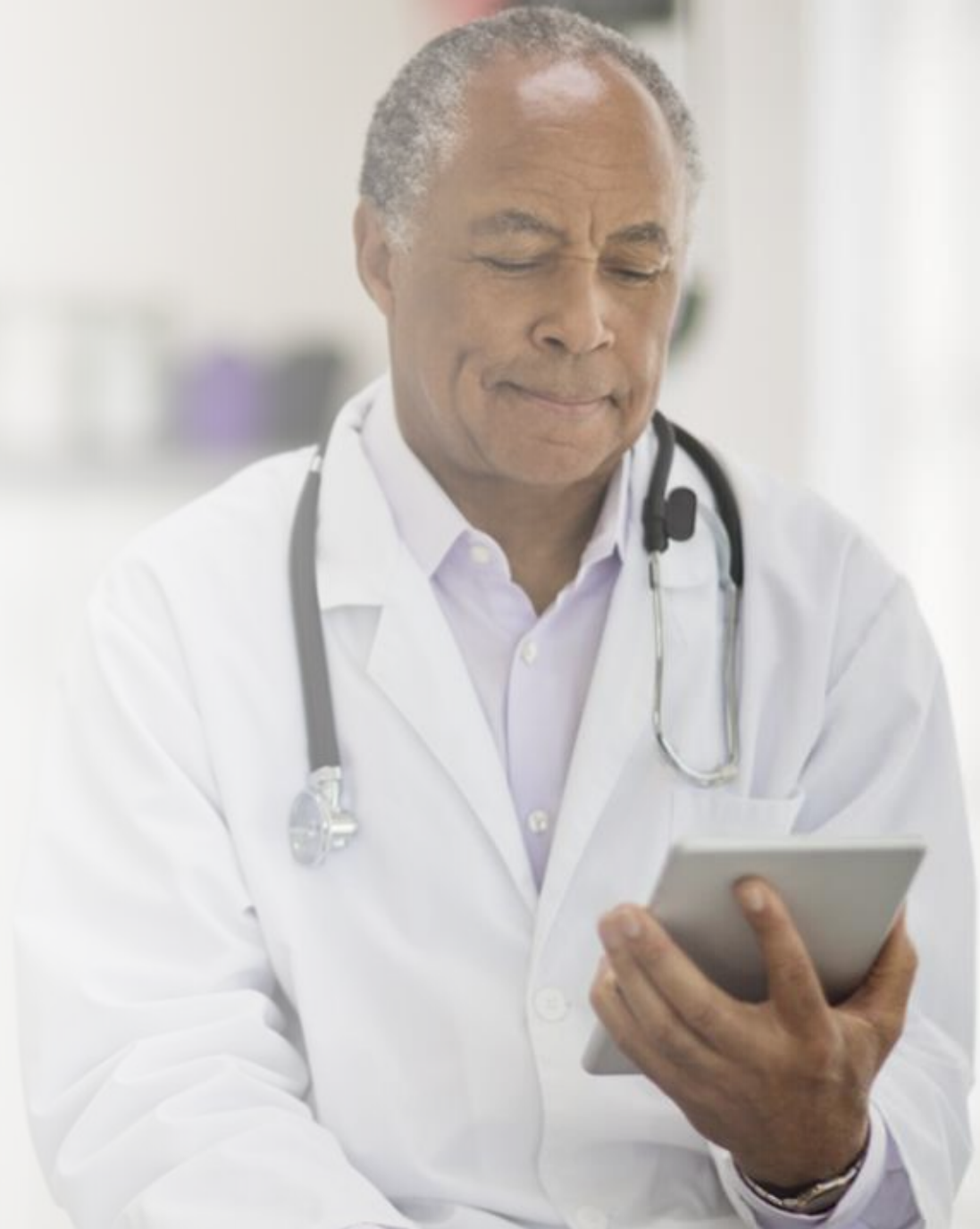
How likely are you to go to an outpatient facility for an elective outpatient procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees?



Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020

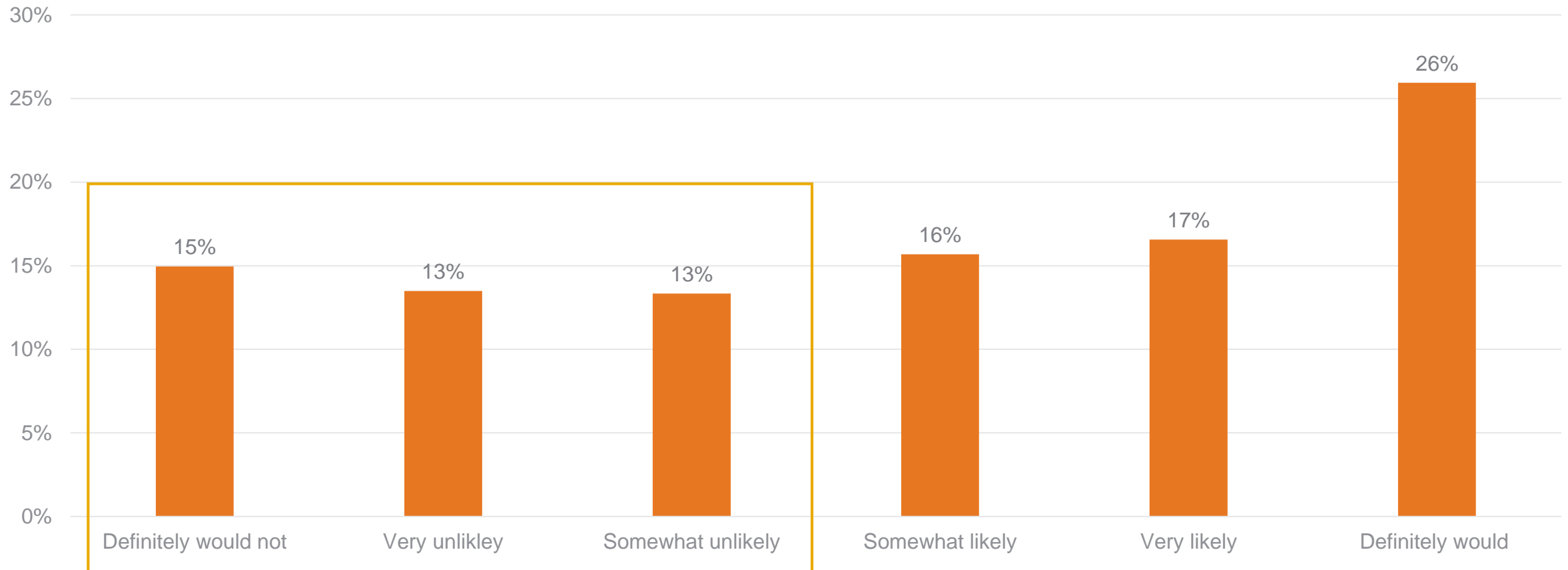


Use of Physician Practices



41% 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?

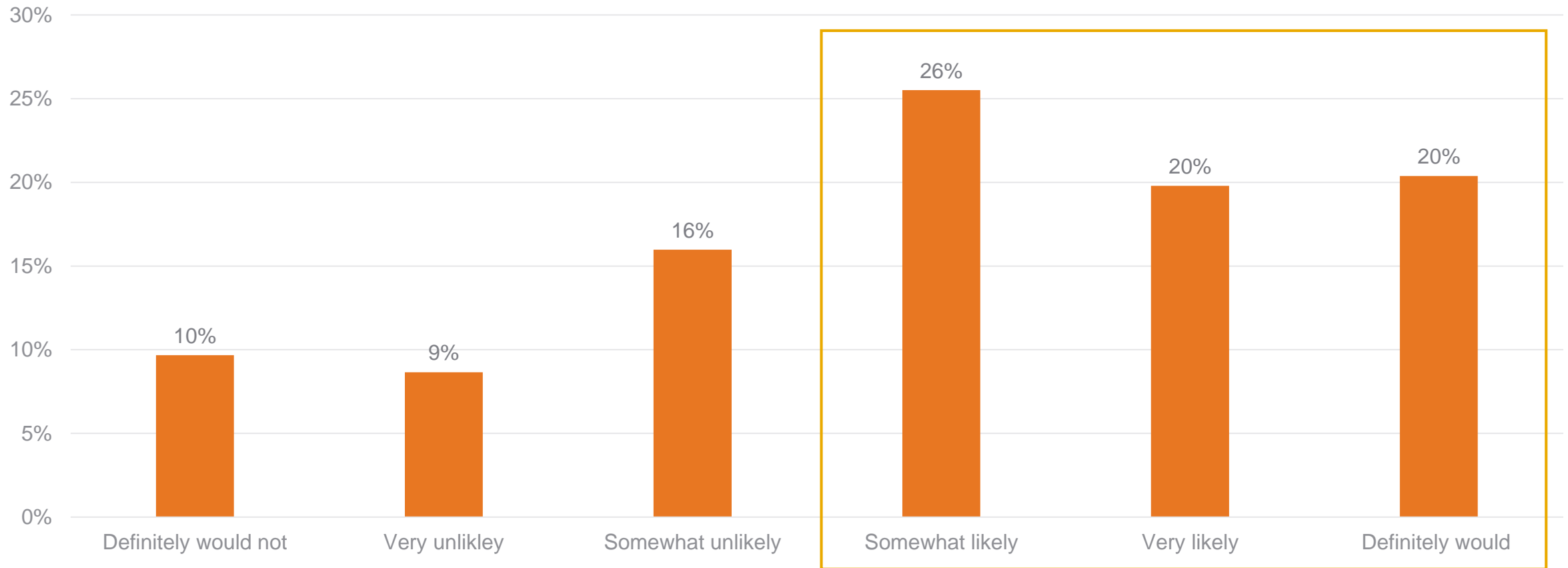


Source: Optum Consumer Pulse Survey, N=700, conducted May 4-8, 2020



66% likely 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 May 4-8, 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 Wave 1 of the Consumer Pulse Survey
- ✓ Request to be notified when Wave 2 is published (Week of May 25)
- ✓ 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