



# COVID-19 Consumer Behavior

## Key Findings and Takeaways from Wave 2 of the Optum Consumer Pulse Survey

May 28, 2020



# Overview of the Optum COVID Concern Index

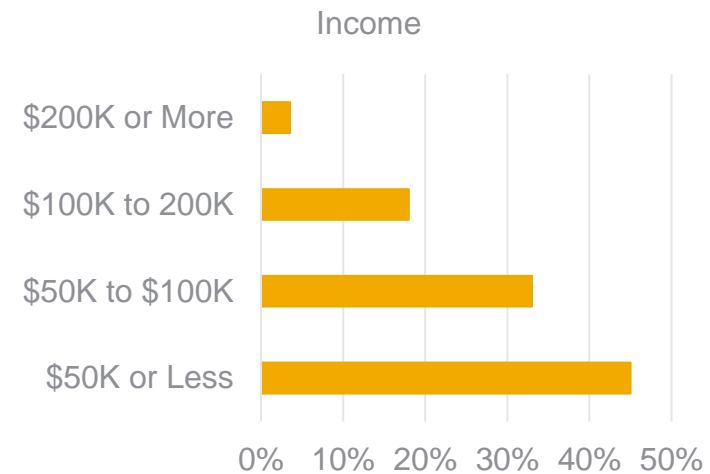
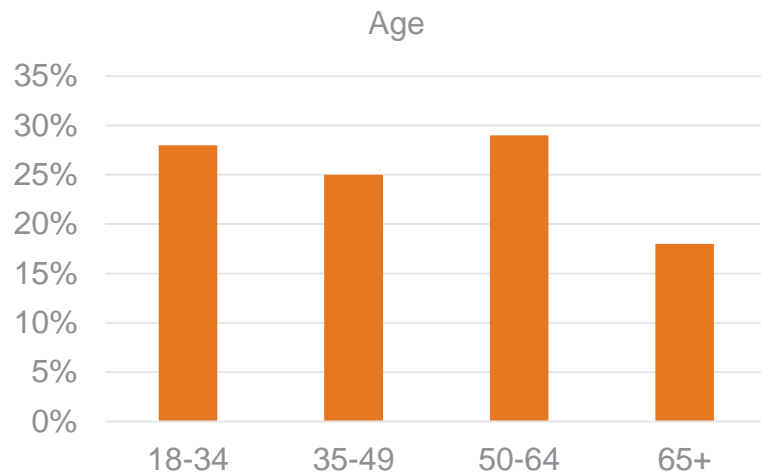
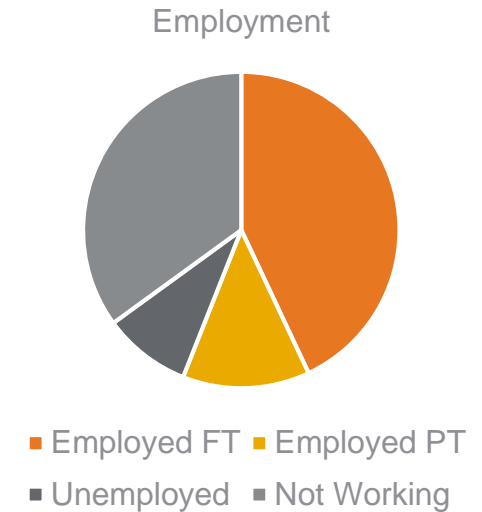
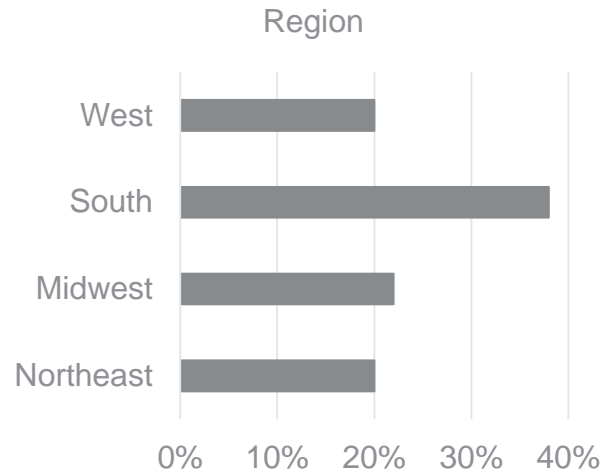
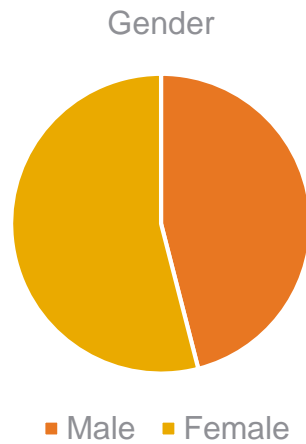
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## Key findings and takeaways

- 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 and 2 of a six-part research series. Upcoming surveys will be conducted the weeks of 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 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](mailto:michelsb@optum.com)

# Consumer Pulse Survey respondent profile

Summary of Wave 2 respondent profiles. Organized for ease of use. N = 700 and MOE of +/- 4%



## Key findings and takeaways

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Slightly more consumers willing to show up for a previously scheduled medical procedure in a hospital today; **but majority still unlikely to go**

- 64% of consumers are likely to **reschedule or postpone a medical procedure in a hospital** that was scheduled for today; down just slightly from 66% two weeks ago.
- The biggest change comes from those who say they **would “definitely” reschedule** where we see a drop from a high of 24% two weeks ago to 19% today. Among women, it declined from 27% to 19%.
- We also see a significant drop among women 65+ with 24% saying they **would “definitely” postpone a procedure** declining from 37% two weeks ago.
- Overall consumer **likelihood to show up for a procedure in a hospital or outpatient facility** remains unchanged, but with somewhat less certainty.

## Key findings and takeaways CONTINUED

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

- One in five consumers (18%) are **still likely to avoid the ED despite showing signs of a heart attack or appendicitis** (unchanged from two weeks ago)
- And **among those who are unemployed**, fully one in three (34%) would now avoid the ED even for life threatening symptoms
- Among those say they are **likely to avoid the ED despite a cut that may require stitches** the number has dropped from 40% to 35% overall, but over half (51%) of those who are unemployed would put off going
- While a slight majority of consumers **would now use an urgent care center or other freestanding medical center** for a minor illness or injury (55% vs 48%)

## Key findings and takeaways CONTINUED

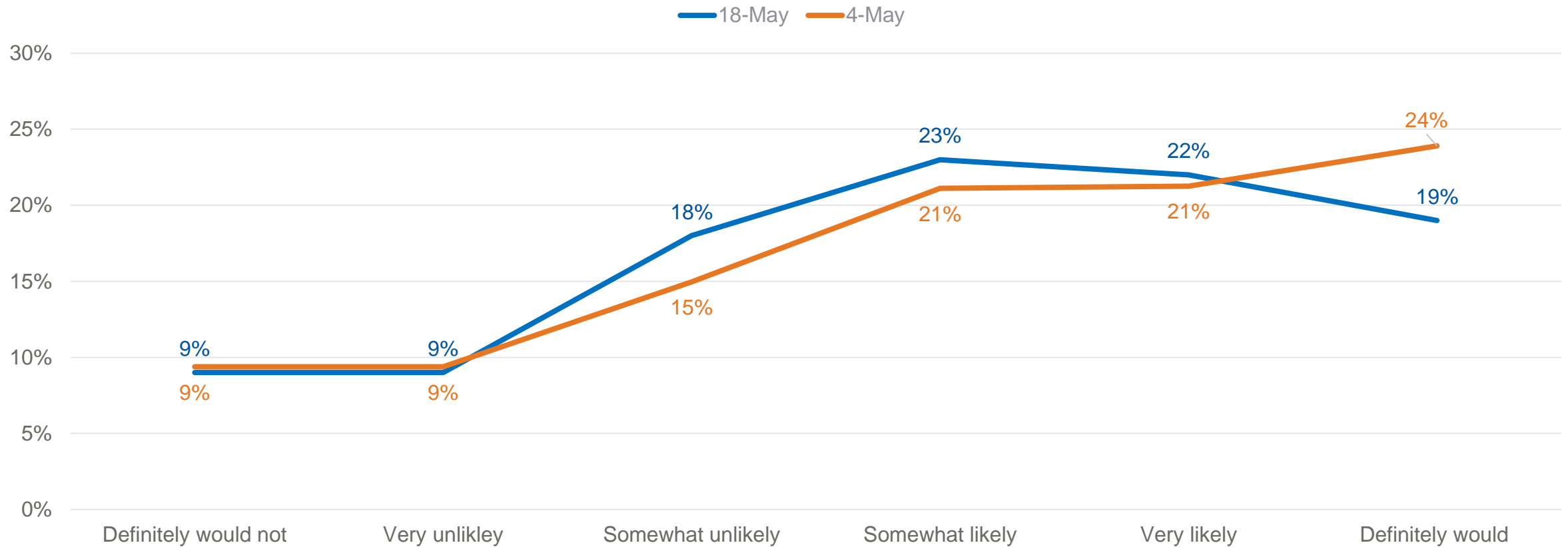
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While more consumers are willing to seek care in a physician's office today, a majority would still prefer to do so virtually

- A slightly higher number of consumers (62% vs. 59%) are **likely to keep a previously scheduled doctor's appointment**
- 61% (down slightly from 66%) with a scheduled physician appointment are **more likely to use telehealth**
- **Women remain especially more likely to use telehealth** (63% of women vs. 60% of men say they are likely to use)
- Telehealth is also popular among households with higher incomes, the South and Northeast regions, and consumers who are 35-49 years of age (although over half of consumers 65+ would also use telehealth today)

# Slightly Fewer Consumers Likely to Postpone 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?

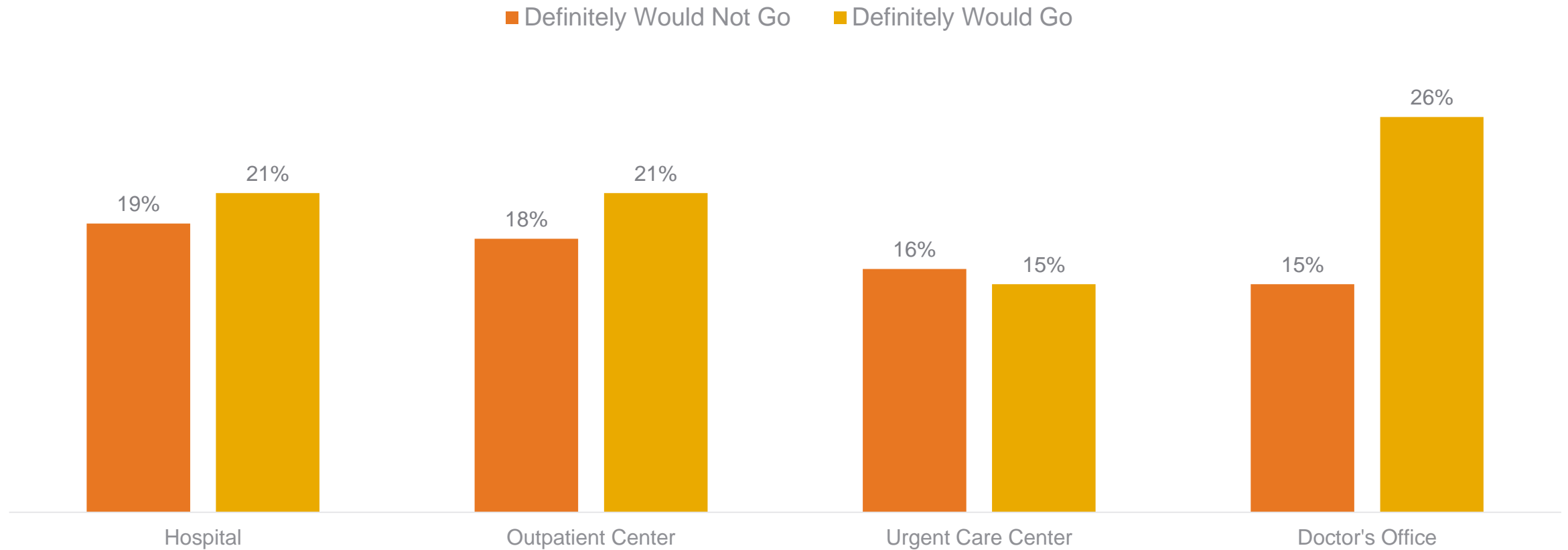


Source: Optum Consumer Pulse Survey, N=700, conducted Weeks of May 4-8 and May 18-22



# Consumers Are Least Likely to Visit a Hospital Today

Wave 2 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 May 18-22, 2020

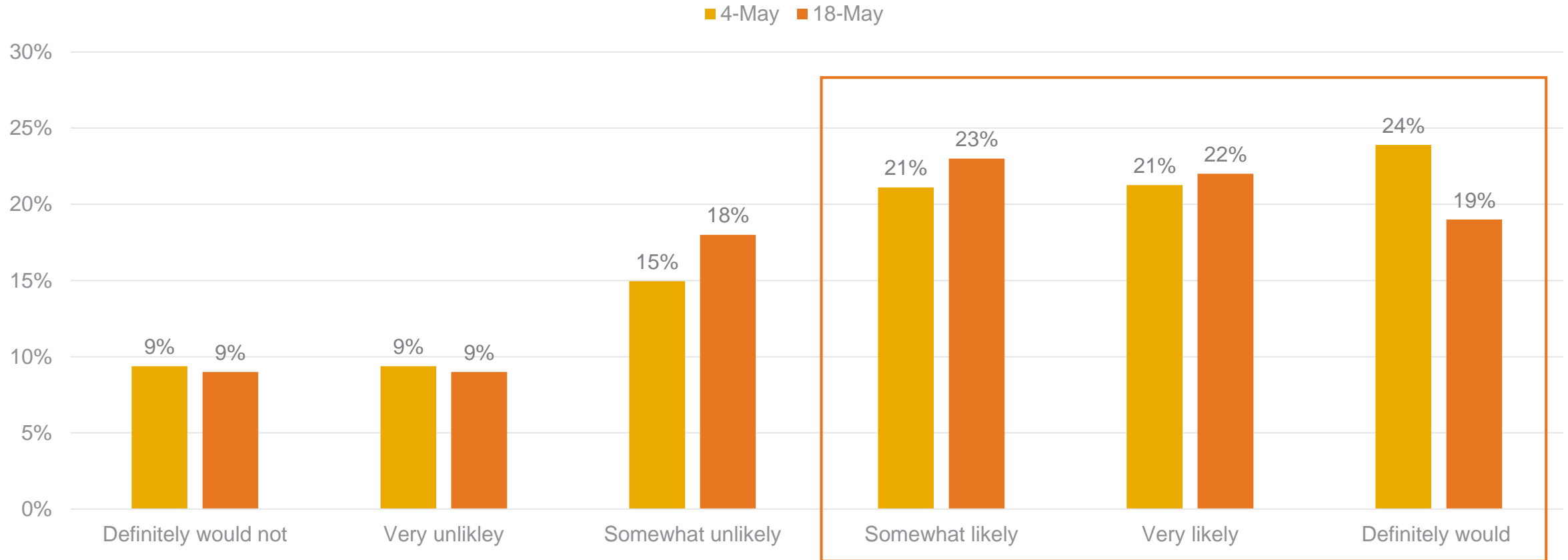


# Use of hospitals and health systems



# 64% still likely to postpone hospital care today

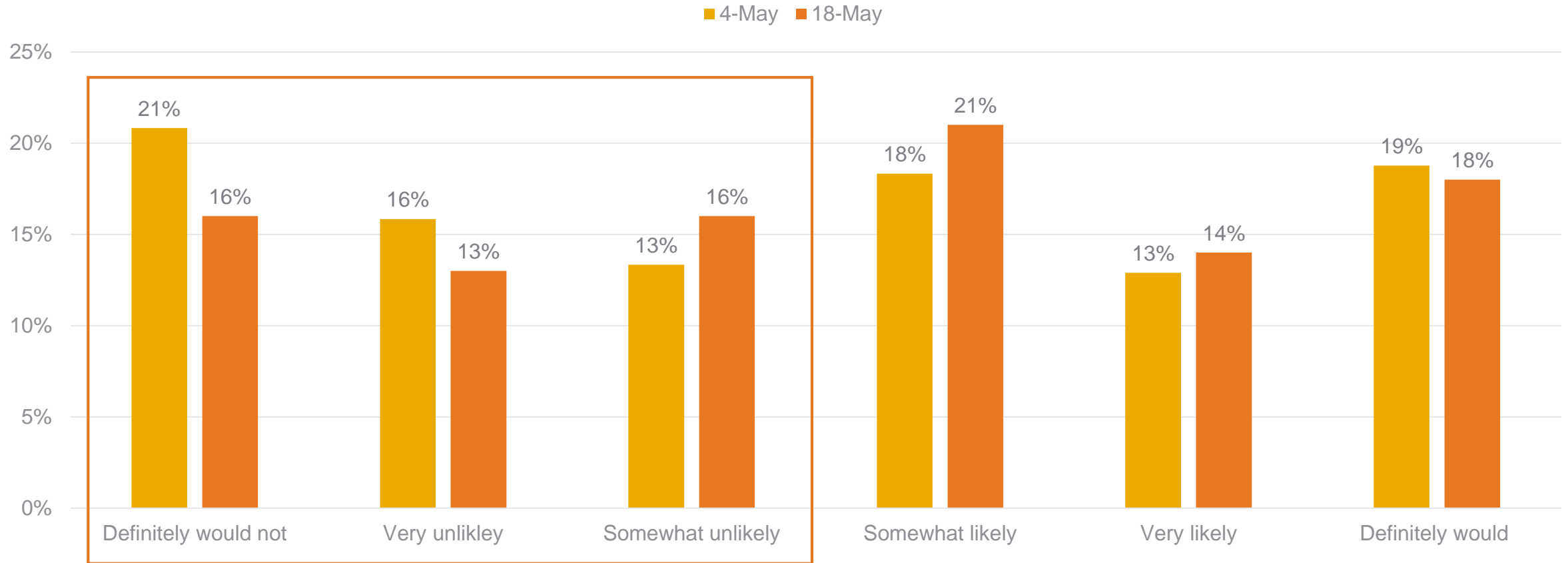
*How likely are you to reschedule or postpone a medical exam or procedure at a hospital that was scheduled for today because of COVID-19?*



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

# 47% still unlikely to use a hospital for an elective procedure today

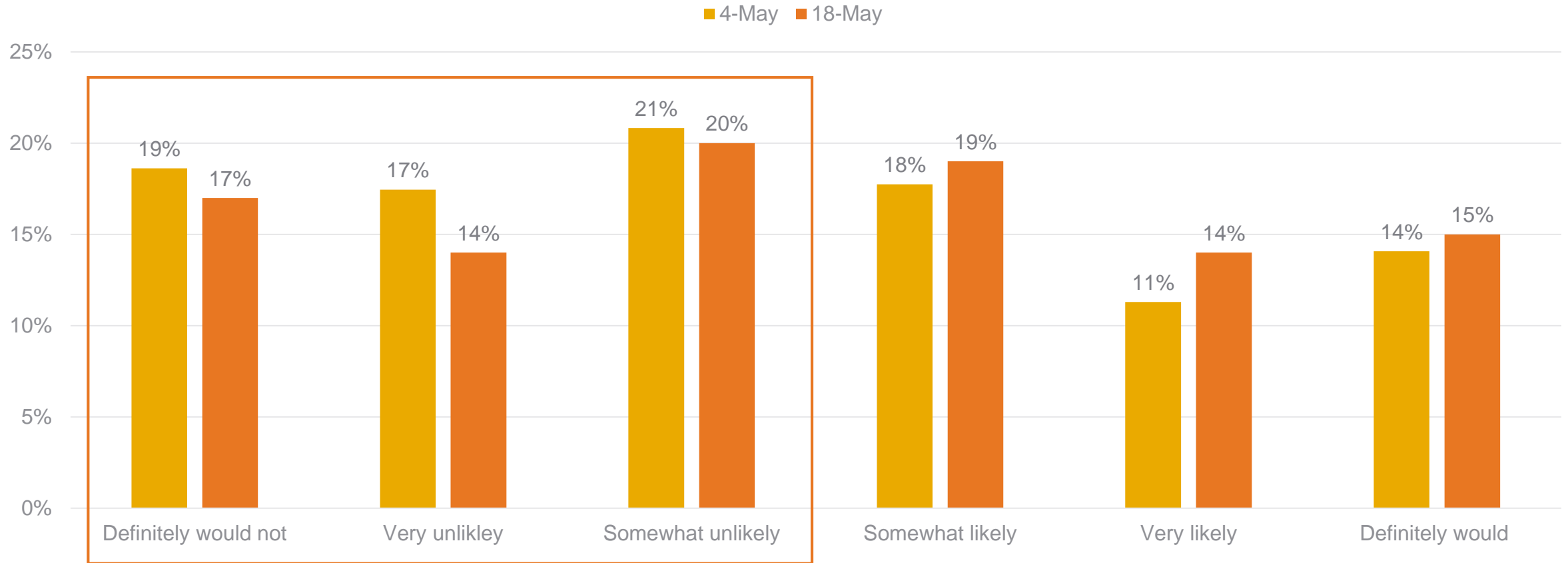
*How likely are you to go to a hospital for an elective procedure (e.g. MRI, colonoscopy, mammogram, outpatient surgery) today, if it was already scheduled and there were no cancellation fees?*



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

# 51% 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?*

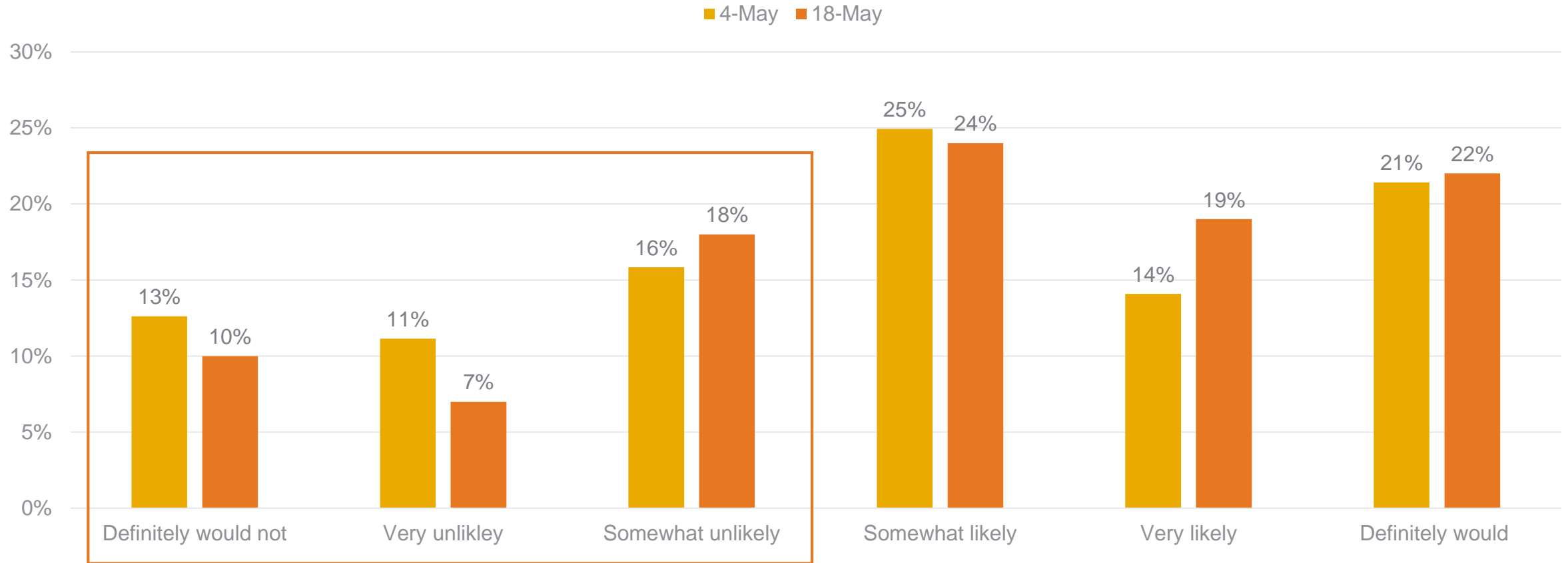


Source: Optum Consumer Pulse Survey, N=700, conducted Weeks of May 4-8 and May 18-22

# Use of hospital emergency departments

# 35% 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?*

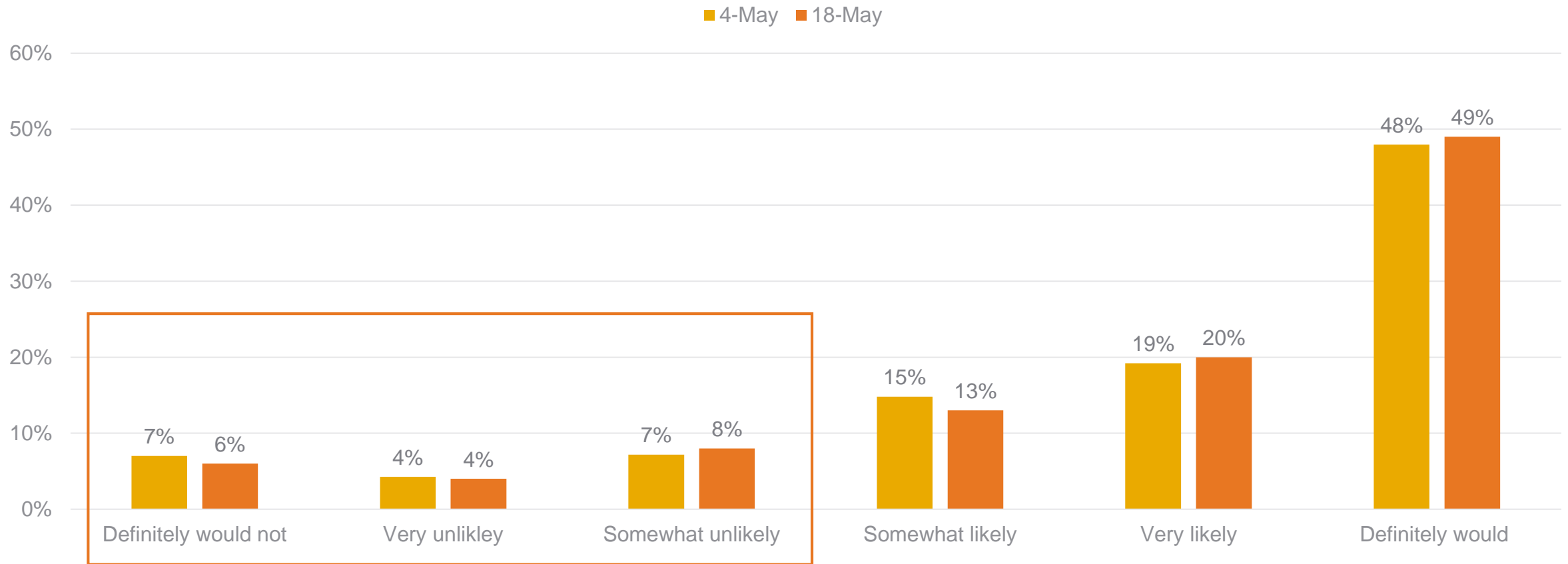


Source: Optum Consumer Pulse Survey, N=700, conducted Weeks of May 4-8 and May 18-22



# 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?*



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

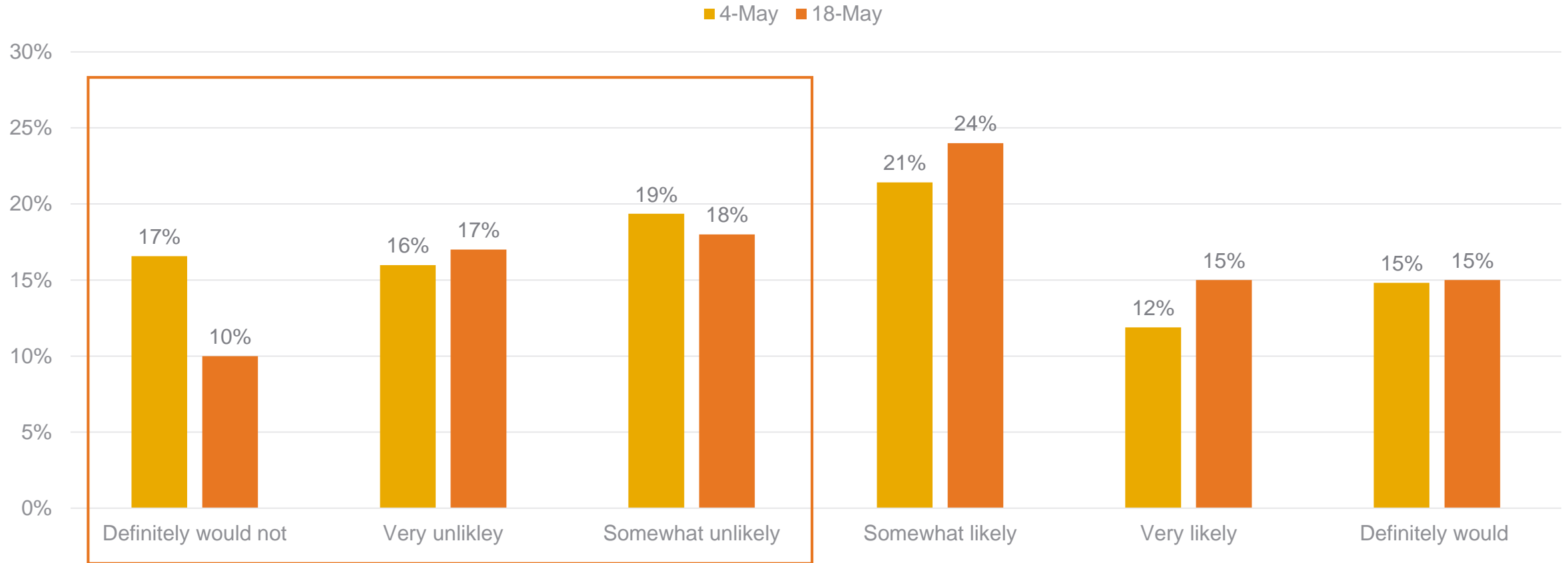
# Use of outpatient and freestanding centers





# 45% 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?*

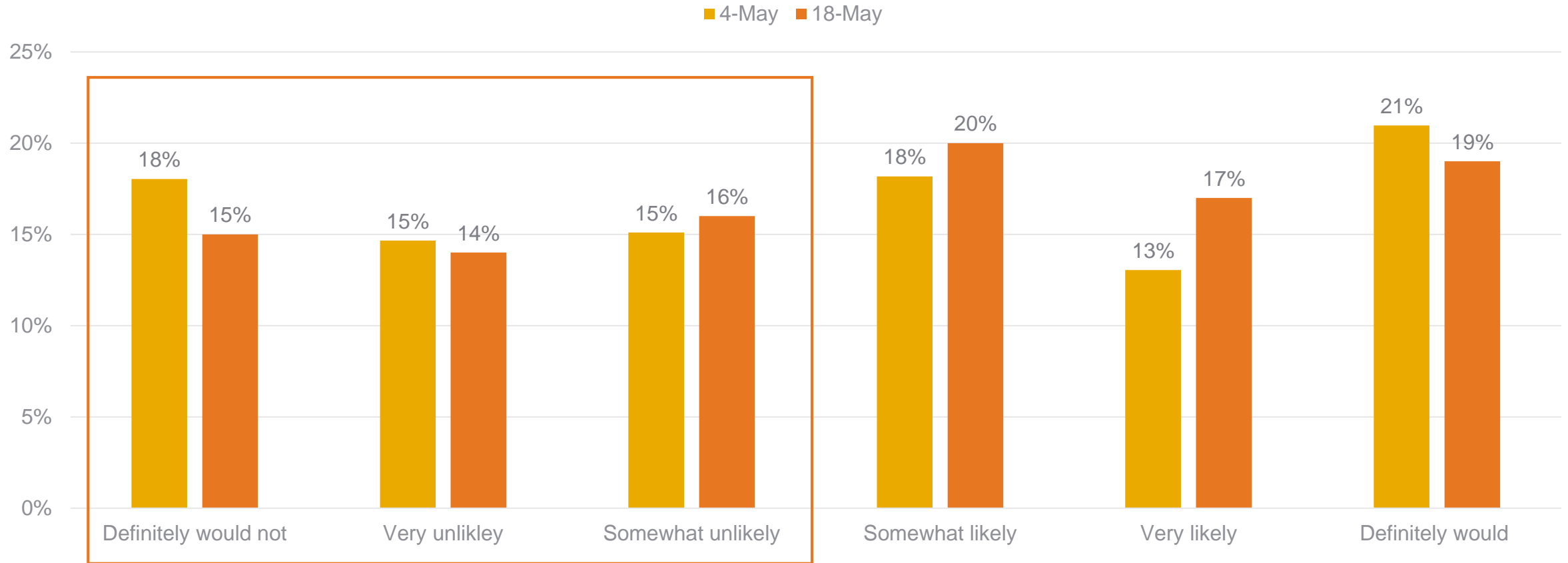


Source: Optum Consumer Pulse Survey, N=700, conducted Weeks of May 4-8 and May 18-22



# 45% 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?*



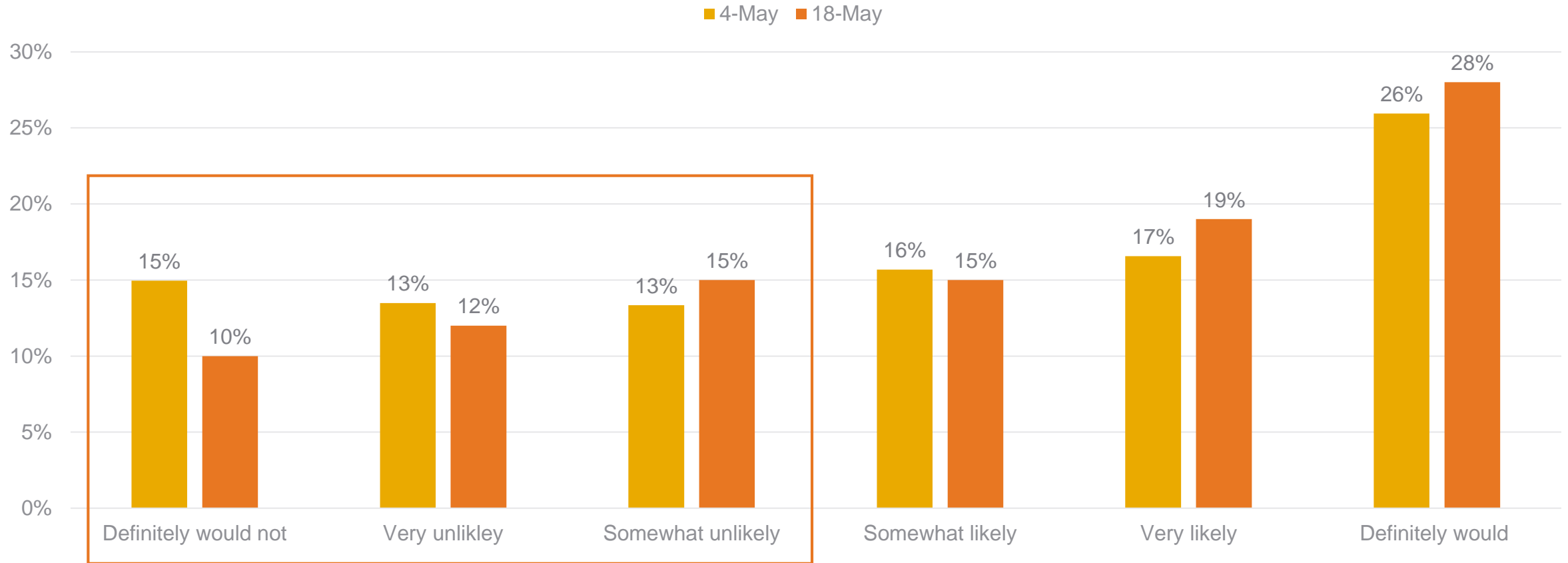
Source: Optum Consumer Pulse Survey, N=700, conducted Weeks of May 4-8 and May 18-22

# Use of physician practices



# 37% 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?*

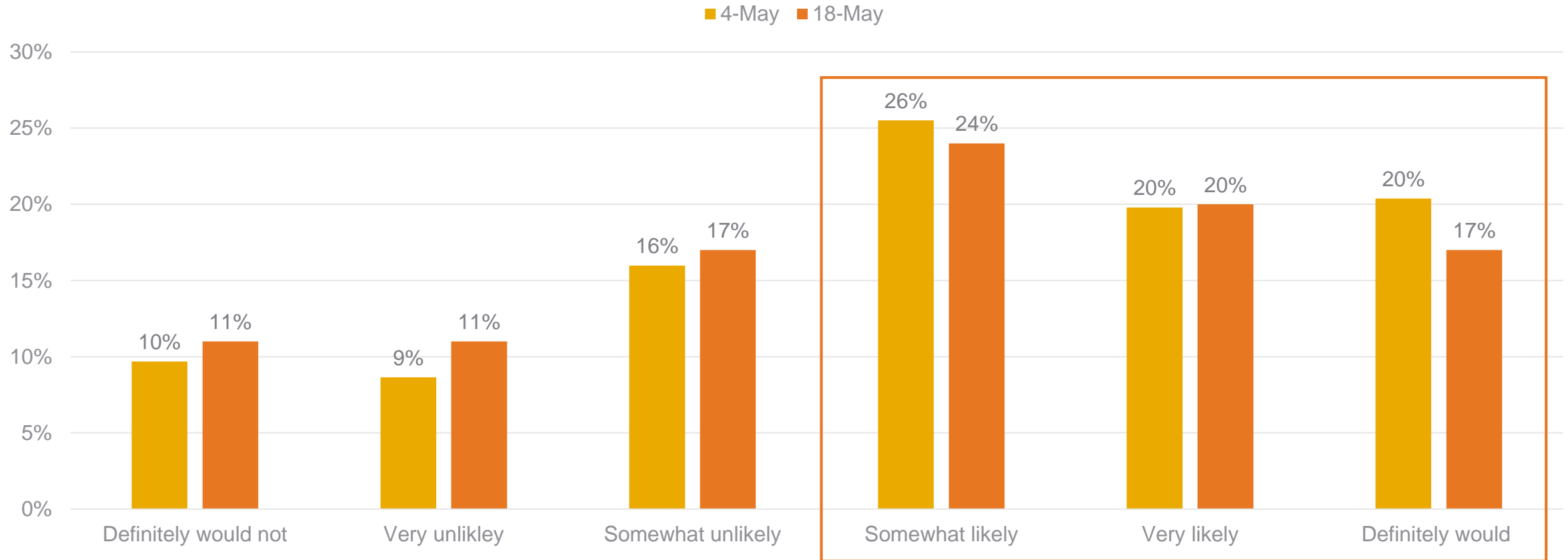


Source: Optum Consumer Pulse Survey, N=700, conducted Weeks of May 4-8 and May 18-22



# 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?*



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



# More Information and Insights

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Please stay in touch and let us know how we can help you

- ✓ Request a complete set of findings from Waves 1 and 2 of the Consumer Pulse Survey
- ✓ Request to be notified when Wave 3 is published (Week of June 8)
- ✓ 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](mailto:michelsb@optum.com)