June 2020

Consumer Attitudes Inform Post-COVID Recovery
As hospitals work to understand the implications of COVID-19 on their future, a critical question is how quickly patients will return to different healthcare settings.

Anecdotal evidence shows that some hospitals are seeing inpatient surgery volumes returning rather quickly, likely due in part to the backlog of procedures delayed by COVID. We are also hearing from executives that emergency department and clinic visits continue to lag the volumes of previous years.

In an attempt to gauge overall attitudes to healthcare in the wake of COVID, Kaufman Hall surveyed 1,000 consumers in April and May.

Our findings over this period suggest notable concerns about returning to different types of healthcare facilities, particularly EDs, but also show that apprehensions about safety are shrinking.

**QUESTION:** As coronavirus restrictions ease, how comfortable would you feel about receiving care for a healthcare need at the following locations?

<table>
<thead>
<tr>
<th>Location</th>
<th>Very Uncomfortable</th>
<th>Uncomfortable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Room</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Hospital</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Walk-in Clinic</td>
<td>23%</td>
<td>17%</td>
</tr>
<tr>
<td>Urgent Care</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>Outpatient Surgery Center</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Doctor’s Office</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Telehealth/ Virtual</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Proprietary Kaufman Hall consumer research.
Health and Safety Concerns Remain High

Consumer anxiety about COVID-19 decreased slightly from April to May, but a majority remain concerned about COVID-19 directly affecting their health, or the health of a family member or other loved one. Those worries are influencing their healthcare decisions.

60% are extremely or moderately concerned about COVID-19 directly affecting them or a loved one.

Source: Proprietary Kaufman Hall consumer research.
Multiple Factors Drive Decisions to Delay Care

More than half of consumers (55%) have delayed or skipped medical care since the start of the pandemic, according to a separate survey by Jarrard Phillips Cate & Hancock. The Kaufman Hall surveys provide insights to the reasons why.

**QUESTION:** How likely is it that you’ll delay receiving planned/scheduled care for the following reasons?

- **Fear of contracting COVID-19:** 28% Very Likely, 27% Likely
- **Fear of having to go to a hospital:** 26% Very Likely, 16% Likely
- **Fear of spreading COVID-19:** 19% Very Likely, 16% Likely
- **Fear of violating social distancing guidelines:** 11% Very Likely, 11% Likely
- **Financial difficulties:** 14% Very Likely, 10% Likely
- **Loss of insurance:** 11% Very Likely, 8% Likely

**54%** cite fear of contracting COVID-19 as a primary reason to delay care.

Commercial enrollees are **more likely to delay care** to avoid hospital-based treatment:
- 49% commercial enrollees
- 35% Medicare enrollees

Source: Proprietary Kaufman Hall consumer research.
Consumers’ Attitudes Vary by Care Site

Consumer sentiment has shifted since the start of the pandemic. From April to May, the proportion of consumers willing to seek non-emergency care increased slightly at various sites, while those opting to delay care decreased. A doctor’s office remains the most popular option, while emergency rooms and walk-in clinics are least popular. More consumers are trying virtual care than ever before, with telehealth visits projected to top 1 billion in 2020, according to Forrester Research.

**QUESTION:** Where would you go to seek care for a non-emergency health issue during this pandemic?

<table>
<thead>
<tr>
<th>Care Site</th>
<th>April Survey</th>
<th>May Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctor’s office</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Virtual care/Telehealth provider</td>
<td>24%</td>
<td>31%</td>
</tr>
<tr>
<td>Emergency room</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Walk-in clinic (e.g., Walgreens, CVS)</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Urgent care</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Delay care</td>
<td>28%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Interest in virtual care is increasing across all age groups:

- Just 8% participated in a virtual visit in the past year, prior to COVID-19
- Now 31% would choose virtual care for a non-emergency issue
- And 60% say they would be comfortable using virtual care

Source: Proprietary Kaufman Hall consumer research.
Consumers Value Safety Precautions

Implementing added safety precautions will be essential for healthcare providers seeking to draw patients back to their facilities. Use of Personal Protective Equipment (PPE) ranked as most important to consumers, followed by social distancing and fever screenings.

**Staff PPE and social distancing** are more important to Boomers (87% and 89%, respectively) than Millennials (76% and 70%).

**QUESTION:** How important will the following precautions by healthcare providers be in helping to minimize or eliminate your concerns about seeking care for non-emergency health issues?

Source: Proprietary Kaufman Hall consumer research.
Despite concerns over the risks of exposure to the virus, consumer trust in personal physicians and local hospitals and health systems remains high. Asked who they most trust for advice on staying healthy during the pandemic, consumers rated public health organizations—such as the Centers for Disease Control and Prevention and the World Health Organization—as the most trusted sources, followed by physicians and hospitals. Healthcare providers must work to maintain and build upon that trust in the months ahead with thoughtful and proactive consumer engagement initiatives.

**QUESTION:** Whom do you trust the most to give you the best information and advice to stay healthy during the pandemic?

![Bar chart showing consumer trust in various sources during the pandemic.](chart.png)

Source: Proprietary Kaufman Hall consumer research.
Meeting the Challenges Ahead

As one hospital leader said at a recent Kaufman Hall roundtable:

“Just because a procedure has been delayed doesn’t mean it’s going to come back on our books.”

Drawing patients back to in-person care sites will take time. As COVID-related restrictions continue to ease, hospitals and health systems will need to:

- Address safety concerns by ensuring they maintain the types of precautions that matter most to consumers.
- Ensure constant communication to effectively convey precautions and other organizational messaging on an ongoing basis, both internally and externally. Communications should be clear and engaging, telling stories that appeal directly to consumers to assuage fears and build trust.

The COVID-19 pandemic is driving major changes in the nation’s healthcare system, including in how consumers approach personal healthcare decisions. Many changes occurring now—such as the explosion in virtual care—will be permanent fixtures, to be integrated and vastly improved upon in future care delivery models. Other changes and innovations remain to be seen.

Regardless of the many unknowns, one thing is certain: navigating the future of healthcare will require intense focus on anticipating, understanding, and responding to the attitudes, expectations, and needs of consumers.
CONSUMER ATTITUDES INFORM POST-COVID RECOVERY

Demand Modeling
Integrated Strategic/Financial Planning
Rolling Forecasting
Performance Improvement
Treasury & Capital Markets
Recovery and Turnaround Planning
Restructuring Transactions
Program Management

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Questions? Contact Us

For more information about preparing your hospital for a post-COVID-19 world, email covidrecovery@kaufmanhall.com, or visit kaufmanhall.com.