How is the Coronavirus Impacting Healthcare Perceptions and Behaviors? (Renown Local Market Results vs. National)
• This report presents findings from Renown Health’s local market compared to national findings from Klein & Partners’ National Omnibus Wave II survey which focused on consumer reactions to the Coronavirus.
Methodology

Online survey

National: n=502 / Local: n=306

Wave II Fielded: May 1-4, 2020 (Local: May 1-7)

National random sample of adults + an oversample of consumers across Renown’s PSA (n=156) and SSA (n=150) market areas

Note: Arrows (↑↓) and **bolded scores** indicate a statistically significant difference between those two data points

Note: National scores will be identified in charts either as ‘National’ (always Wave II) or ‘Wave II, Wave I.’ Renown scores will be identified as ‘Local.’
What did we learn?
Where are we on this journey?
There has been a significant shift in people’s perceptions of where they feel we are on this difficult journey.
Coronavirus Exposure
Exposure to the Coronavirus

I don’t know anyone with it 69%

A friend has it 17%
A family member has it 9%
A household member has it 3%
I have the Coronavirus 1%

Tested for Coronavirus?

No need 70%
Refused 6%
Symptomatic but haven’t tried yet 7%
Tried but couldn’t get it yet 11%
Yes, positive 2%
Yes, negative 3%

Local/National
Doctor’s office: 40%/12%
Hospital ER: 42%/26%
Urgent care center: 6%/29%
Retail clinic: 0%/31%
Drive-through: 11%/0%
Self-testing kit: 0%/0%

And, almost all those tested are 18-44.

PSA: 63% SSA: 75%

Wave II Wave I
I don’t know anyone with it 75% 78%
A friend has it 17 14
A family member has it 5 2
A household member has it 2 1
I have the Coronavirus 1 1
Work Impact
The Coronavirus impact on work

**Work Status**

- **Still going to work**
  - Local: 15%
  - Wave I: 16%
  - Wave II: 12%

- **Working from home**
  - Local: 17%
  - Wave I: 24%
  - Wave II: 25%

- **Furloughed with pay**
  - Local: 3%
  - Wave I: 5%
  - Wave II: 2%

- **Furloughed without pay**
  - Local: 9%
  - Wave I: 8%
  - Wave II: 11%

- **Fired/terminated**
  - Local: 6%
  - Wave I: 4%
  - Wave II: 5%

- **Didn’t work outside home before**
  - Local: 44%
  - Wave I: 40%
  - Wave II: 39%

**Work in Healthcare?**

- **Non-Clinical**
  - 12%/11%

- **Clinical**
  - 13%/7%

**Non-healthcare Occupation**

- **Non-healthcare Occupation**
  - 71%/78%

Note: Local/National
Behaviors During and After the Coronavirus
### ‘New’ Healthcare Behaviors During the Coronavirus

<table>
<thead>
<tr>
<th>Service</th>
<th>Local</th>
<th>Wave II</th>
<th>Wave I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual mental health session</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Called call center</td>
<td>5%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Website Live Chat</td>
<td>4%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Virtual visit</td>
<td>5%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>PCP office visit</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Hospital app</td>
<td>3%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Texted doctor</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Chat Bot Symptom Checker</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Called 24/7 hotline</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Emailed doctor</td>
<td>3%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Retail clinic</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Emailed nurse</td>
<td>1%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Urgent care ctr</td>
<td>2%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Drive-through screening</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Local ‘new’ healthcare behaviors pretty much mirror nationally.
Healthcare Behaviors ‘Definitely’ Will Do After The Coronavirus

- PCP office visit: 49% (Local), 47% (Wave II), 48% (Wave I)
- Urgent care ctr: 24% (Local), 29% (Wave II), 27% (Wave I)
- Email doctor: 26% (Local), 27% (Wave II), 26% (Wave I)
- Text doctor: 23% (Local), 24% (Wave II), 23% (Wave I)
- Retail clinic: 20% (Local), 22% (Wave II), 20% (Wave I)
- Virtual visit: 21% (Local), 28% (Wave II), 29% (Wave I)
- Call call center: 21% (Local), 19% (Wave II), 19% (Wave I)
- Hospital app: 20% (Local), 21% (Wave II), 18% (Wave I)
- Email nurse: 19% (Local), 17% (Wave II), 17% (Wave I)
- Virtual mental health session: 19% (Local), 16% (Wave II), 16% (Wave I)
- Website Live Chat: 19% (Local), 16% (Wave II), 18% (Wave I)
- Symptom Checker Chat Bot: 20% (Local), 17% (Wave II), NA (Wave I)
- In-person mental health session: NA (Local), 15% (Wave II), 18% (Wave I)
When will activities return to normal? (Local)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Immediately</th>
<th>After some time (3-6 mo)</th>
<th>Not sure ever go back</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Social Activities</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Shaking hands</td>
<td>17%</td>
<td>36%</td>
<td>35%</td>
<td>12%</td>
</tr>
<tr>
<td>• Hugging</td>
<td>22%</td>
<td>44%</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>• Social gatherings</td>
<td>20%</td>
<td>57%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>• Having guests over to house</td>
<td>31%</td>
<td>47%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Events</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Concerts/Sports</td>
<td>15%</td>
<td>53%</td>
<td>21%</td>
<td>11%</td>
</tr>
<tr>
<td>• Conference/Seminar</td>
<td>10%</td>
<td>50%</td>
<td>29%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Travel</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Flying domestically</td>
<td>16%</td>
<td>54%</td>
<td>23%</td>
<td>8%</td>
</tr>
<tr>
<td>• Flying internationally</td>
<td>9%</td>
<td>58%</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>• Taking a cruise</td>
<td>8%</td>
<td>36%</td>
<td>40%</td>
<td>15%</td>
</tr>
<tr>
<td>• Staying in a hotel</td>
<td>17%</td>
<td>57%</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Activities</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Eating at a restaurant</td>
<td>29%</td>
<td>53%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>• Shopping at a store/mall</td>
<td>26%</td>
<td>52%</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>• Going to the gym</td>
<td>25%</td>
<td>42%</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>• Going to place of worship</td>
<td>33%</td>
<td>35%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>• Going back to work</td>
<td>47%</td>
<td>29%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>• Saving money</td>
<td>57%</td>
<td>17%</td>
<td>10%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Red = Local score significantly lower than National | Blue = Local score significantly higher than National

Note: Read percentages across not down.
Things You Need to Do to Ease Safety Concerns

Social distancing in the waiting room
Seeing providers wearing masks and gloves
Keeping Coronavirus patients in a completely separate area
Being given a face mask and gloves to wear when you arrive
Waiting in your car until time for your appointment
Seeing providers wash their hands
Seeing everyone’s temperature before they enter the building
All providers and staff are continually tested for the Coronavirus
All patients are tested for the Coronavirus prior to their app’t
Ability to see a provider that does not see any Coronavirus patients
Seeing the room cleaned before you enter
Completing any paperwork at home online before you come in
Seeing the physician or assistants sterilize the equipment
Having contactless payments
Ensuring me you have enough supplies to conduct my procedure
Adv what they are doing to make it safe to come back for care

Separation and protection just like we have been taught
### Preferred Messaging with Patients
*(that would put them most at ease about coming in)*

<table>
<thead>
<tr>
<th>Message</th>
<th>Local</th>
<th>National</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explaining what to prepare for your visit and expect when you arrive and throughout the visit</td>
<td>47%</td>
<td>49%</td>
</tr>
<tr>
<td>Explaining how they are handling any Coronavirus patients that may also be receiving care there</td>
<td>37%</td>
<td>39%</td>
</tr>
<tr>
<td>Explaining how they will maintain social distancing throughout the facility</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>Explaining how they are cleaning the facility</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>Reassuring you that they have all the equipment and supplies for your procedure/surgery</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>Providing a special phone number you can call with questions or concerns specifically about your visit</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Outlining options they have created for receiving your care at a different location or virtually if you want to be seen sooner</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Outlining what they are doing to help you with the cost of the visit before you show up</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Sharing up-to-date statistics on the number of staff who have tested positive and what they are doing to keep others safe</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>A personal and emotional message from your doctor or hospital acknowledging your concerns and reassuring you that it is safe</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>Sharing up-to-date statistics on the number of Coronavirus patients, including number of deaths, at the facility</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Showing you how providers and other staff will be dressed (i.e., wearing PPE) when you visit</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>None of these</td>
<td>12%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Let us explain how we are...  
-or-  
Here’s what we are doing to...  

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*DRG*
Renown Custom
Local Questions
Emotions and Level of Concern
Emotions people are feeling now

Similar to national negative emotions, those 18-44 have significantly higher levels of negative emotions. This age group is getting hit hardest emotionally and financially.
Level of Concern Regarding...

- Household member getting it
- Financial situation
- Getting Coronavirus
- My personal safety
- Provider’s ability to care for me if I get sick
- Emotional well-being
- Overall physical health
- Managing other health conditions
- Availability of Rx I take
- Spiritual health
- Losing my insurance

Not concerned at all | Very concerned

Local | Wave II | Wave I

Household member getting it: 6.07 | 6.00 | 6.38
Financial situation: 5.64 | 5.53 | 6.14
Getting Coronavirus: 5.74 | 5.86 | 6.09
My personal safety: 5.31 | 5.54 | 5.90
Provider’s ability to care for me if I get sick: 5.22 | 5.22 | 5.60
Emotional well-being: 5.15 | 5.13 | 5.54
Overall physical health: 4.98 | 5.13 | 5.52
Managing other health conditions: 4.68 | 4.56 | 5.02
Availability of Rx I take: 3.97 | 4.01 | 4.74
Spiritual health: 4.15 | 4.14 | 4.20
Losing my insurance: 3.76 | 3.59 | 3.86

Wave II & Wave I comparisons...
Appendix
Demographic profile

- 18-44 (41%)
- 45-64 (38%)
- 65+ (21%)

Caucasian: 71%
Hispanic: 22%
Asian: 5%
African American: 2%

24% College

$54,175 – Median household income
How we identify

There is a correlation between lack of a religious faith and higher levels of concern.

- Catholic: 25% | 27%
- Other Christian: 18% | 25%
- Jewish: 1% | 2%
- Islamic: 0% | 0%
- Hindu: 0% | 0%
- Other religion: 3% | 10%
- No specific religion preference: 30% | 25%
- Atheist/Agnostic: 17% | 8%
- Prefer not to share: 6% | 3%

(Note: Local | Wave II)
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