How is the Coronavirus Impacting Healthcare Perceptions and Behaviors? (Renown Local Market Results vs. National)







#### Introduction

• 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

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.'

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

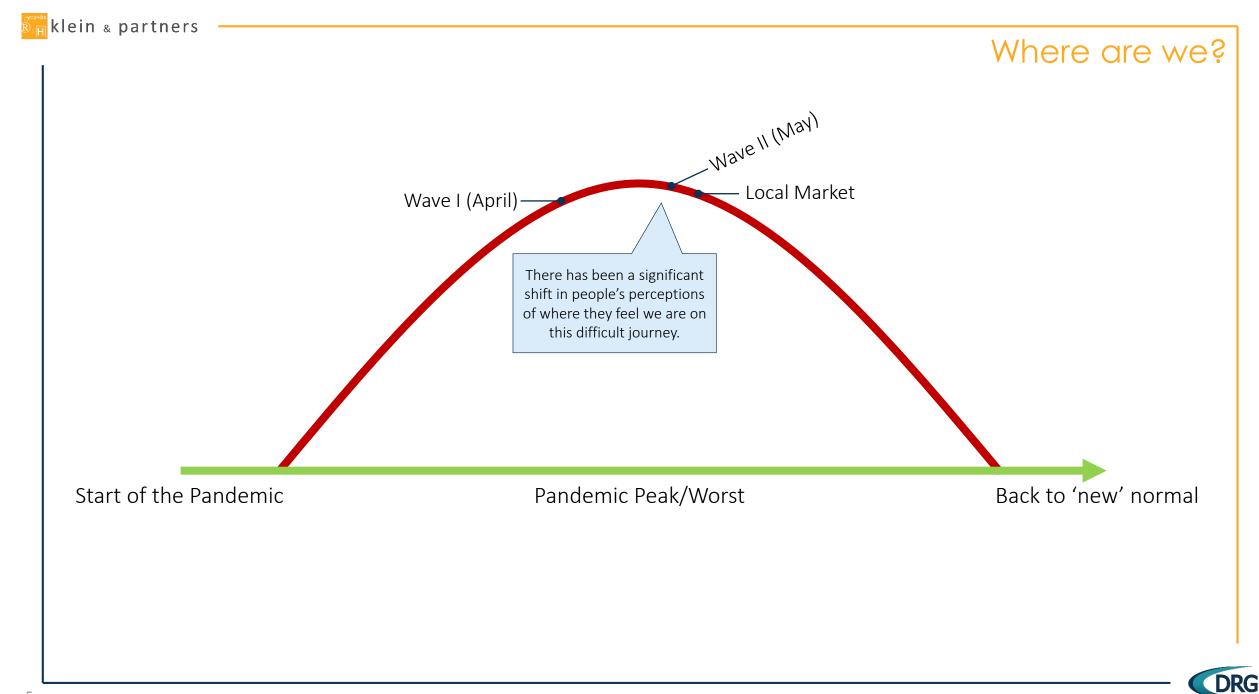
National random sample of adults + an oversample of consumers across Renown's PSA (n=156) and SSA (n=150) market areas

Note: Arrows  $(\uparrow \lor)$  and **bolded scores** indicate a statistically significant difference between those two data points



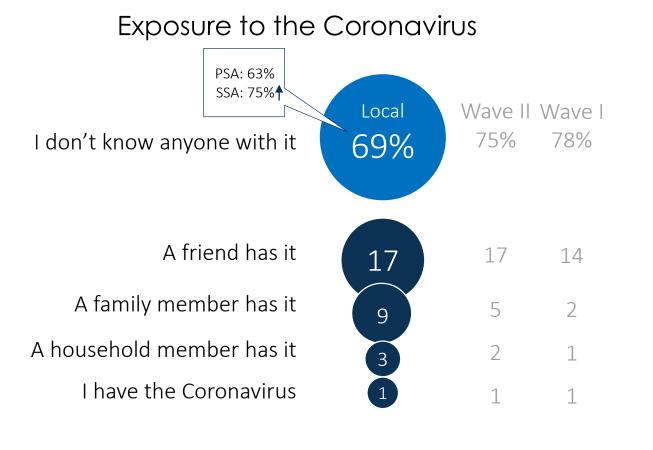
## What did we learn?

## Where are we on this journey?

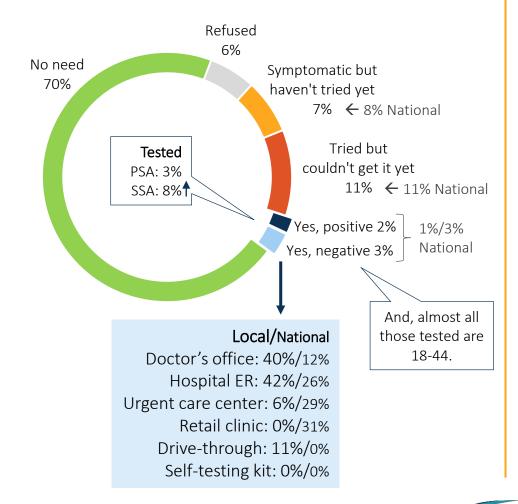


# Coronavirus Exposure

Coronavirus exposure



#### Tested for Coronavirus?





DRG

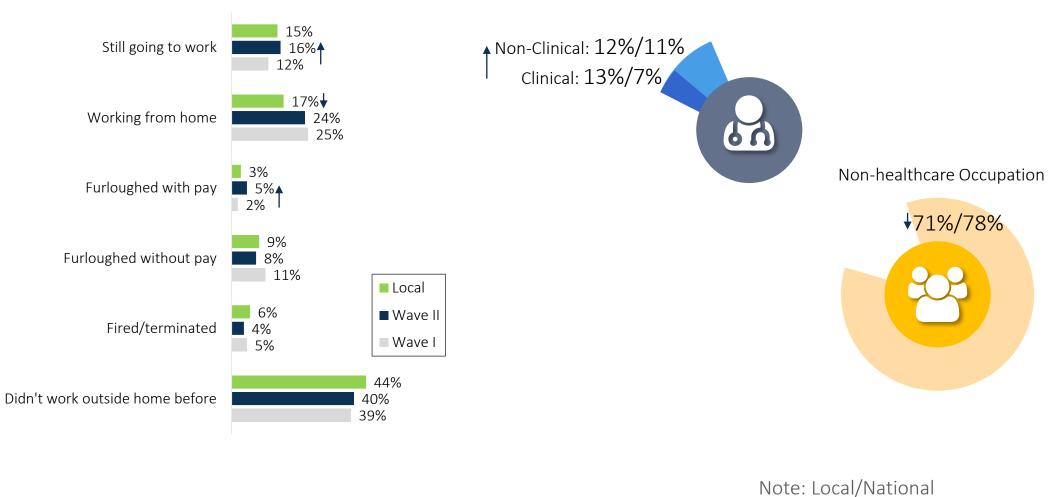
# Work Impact

klein & partners

Work Status

#### The Coronavirus impact on work

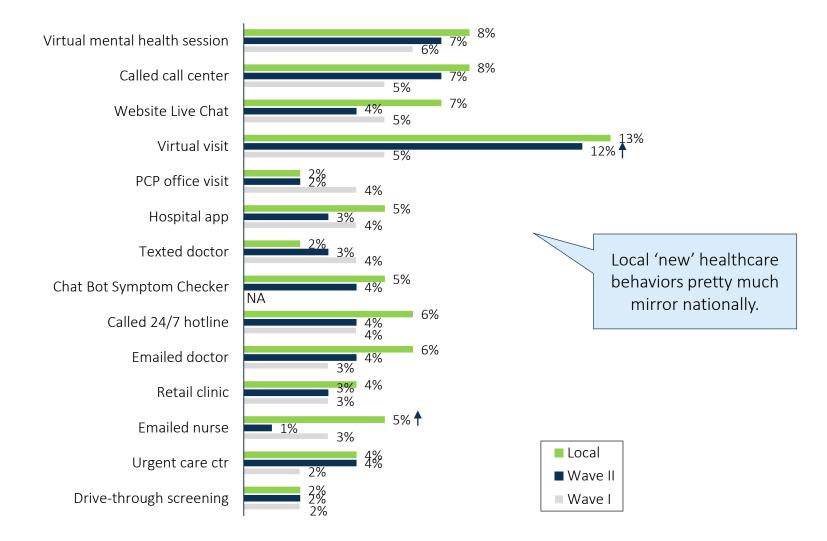
Work in Healthcare?





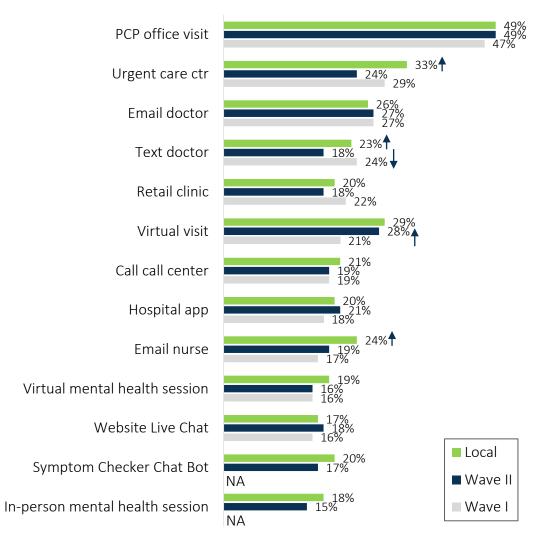
## Behaviors During and After the Coronavirus

#### 'New' Healthcare Behaviors During the Coronavirus





#### Healthcare Behaviors 'Definitely' Will Do After The Coronavirus





### When will activities return to normal? (Local)

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

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



#### Safety concerns

#### Things You Need to Do to Ease <u>Safety</u> 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 4% Having contactless payments 8%10% Ensuring me you have enough supplies to conduct my procedure **8%** 11% Adv what they are doing to make it safe to come back for care

Separation and protection just like we have been taught

Local

National

∎ 37<u>%</u>▼

38%

37%

33%

33% 30%

34%

25%

23% 23% 2%

23%

21%

17%

16%

12%

12%

12%

13%

13%

44%

### Preferred messaging – taking action

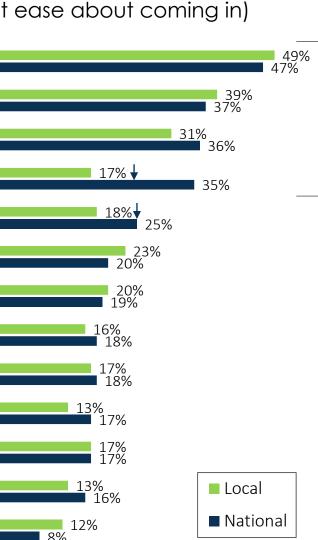
### Preferred <u>Messaging</u> with Patients (that would put them most at ease about coming in)

None of these

Explaining what to prepare for your visit and expect when you arrive and throughout the visit Explaining how they are handling any Coronavirus patients that may also be receiving care there Explaining how they will maintain social distancing throughout the facility

Explaining how they are cleaning the facility

- Reassuring you that they have all the equipment and supplies for your procedure/surgery
- Providing a special phone number you can call with questions or concerns specifically about your visit
- Outlining options they have created for receiving your care at a different location or virtually if you want to be seen sooner
- Outlining what they are doing to help you with the cost of the visit before you show up
  - Sharing up-to-date statistics on the number of staff who have tested positive and what they are doing to keep others safe
  - A personal and emotional message from your doctor or hospital acknowledging your concerns and reassuring you that it is safe Sharing up-to-date statistics on the number of Coronavirus patients,
  - including number of deaths, at the facility
- Showing you how providers and other staff will be dressed (i.e., wearing PPE) when you visit



Let us explain how we are...

- -or-

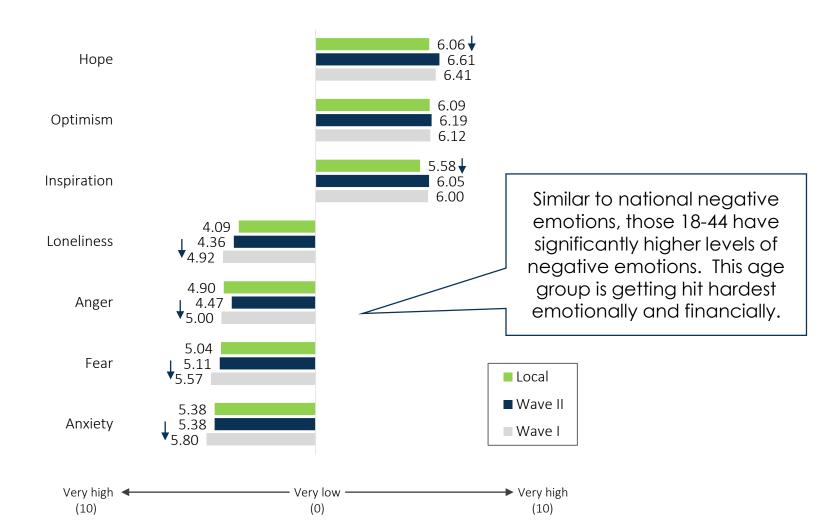
Here's what we are doing to...



Renown Custom Local Questions

## Emotions and Level of Concern

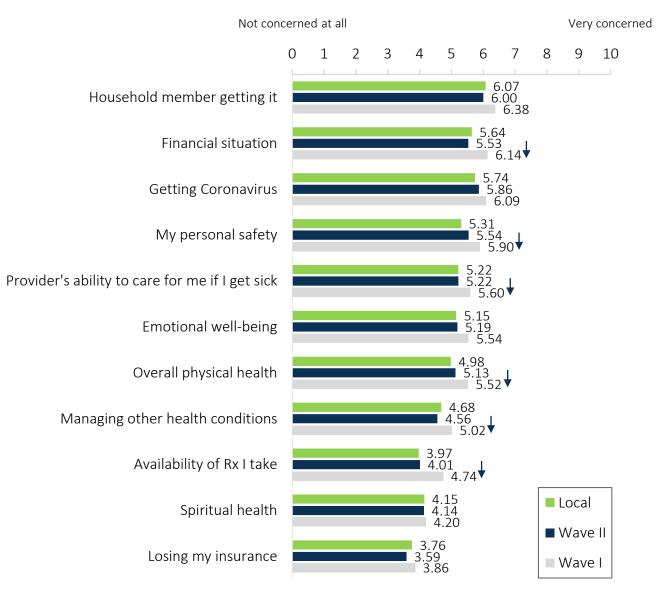
#### Emotions people are feeling now



Emotions



#### Level of Concern Regarding...

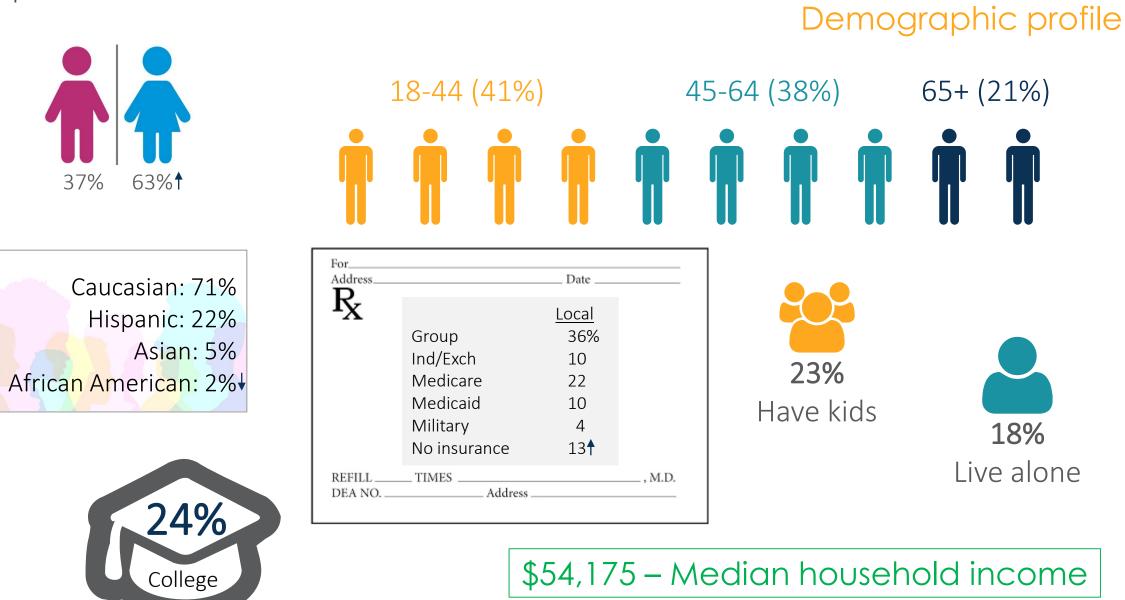




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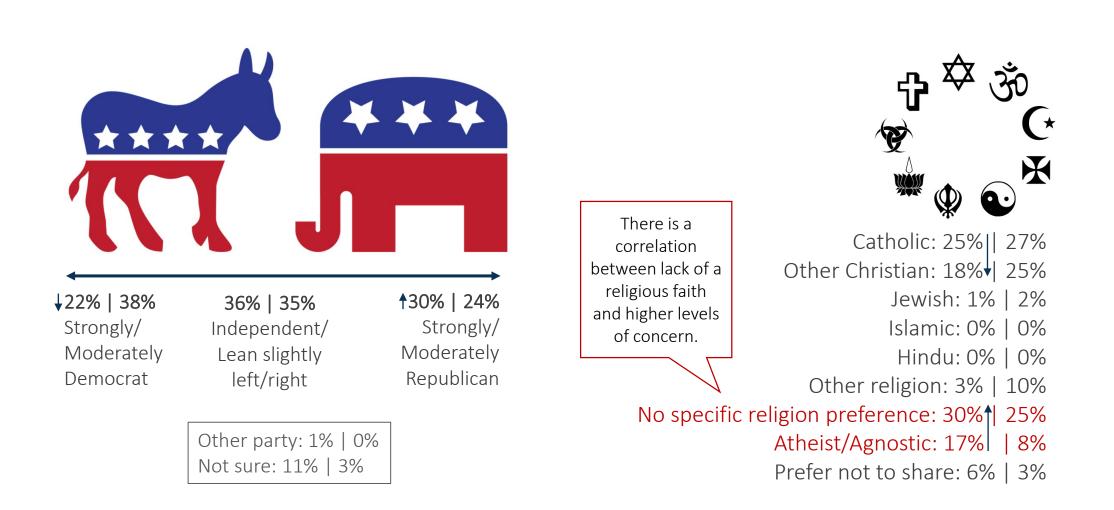
# Appendix







### How we identify





(Note: Local | Wave II)

### About the study sponsors

• Klein & Partners provides research and consulting services solely to the healthcare industry that help clients find their brand's voice. All of Klein & Partners' quantitative and qualitative research and consulting services are geared toward improving your brand's overall health; whether it is in providing information that helps your brand increase its share of new patients or increase its retention of existing patients or even improve current patients' level of interaction (i.e., share of experience) with the brand... because it's all brand research.

• The Dieringer Research Group, Inc. (The DRG) is a full-service marketing research firm specializing in CX/EX research, brand awareness & perception, product development & testing, advertising & communications effectiveness, and market opportunity research across industries such as healthcare and insurance, banking and finance, agencies, and utilities. The DRG is certified as a Women's Business Enterprise by the Women's Business Enterprise National Council (WBENC).



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