

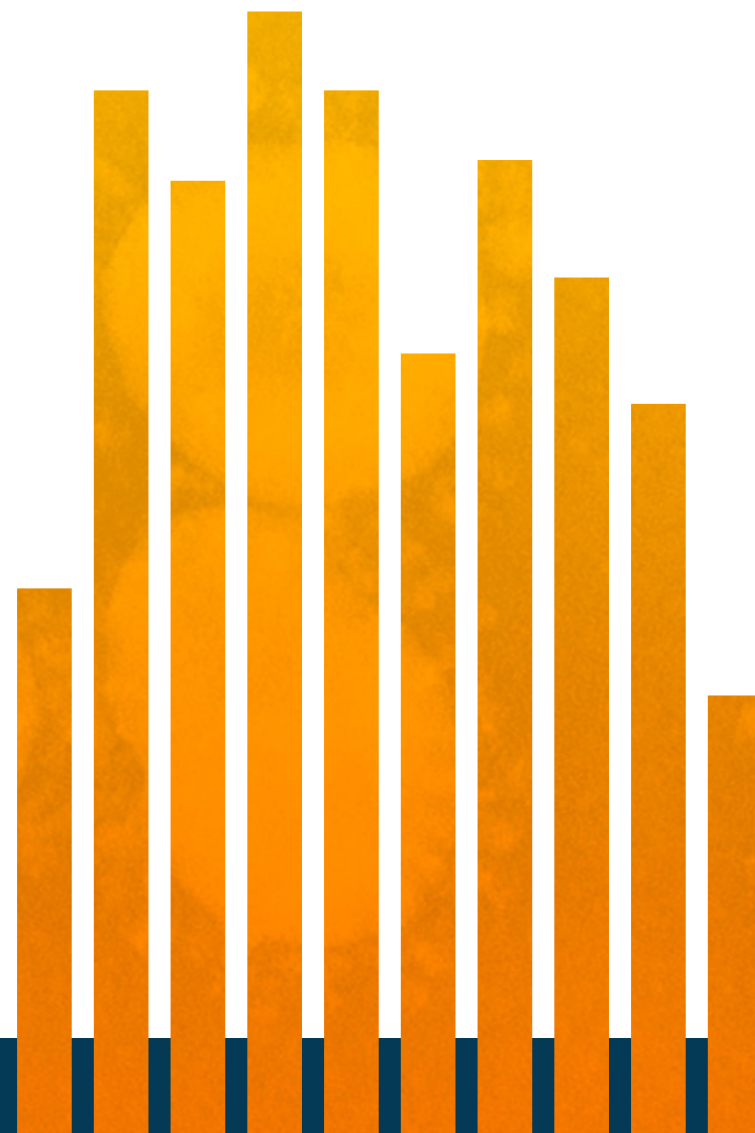
NATIONAL ONLINE SURVEY

Coronavirus

JARRARD

PHILLIPS
CATE &
HANCOCK


PUBLIC OPINION
STRATEGIES
turning questions into answers





**Developed by
Public Opinion
Strategies in
partnership with
Jarrard Inc.**

Field Dates: April 16-20, 2020

N=1,000 Adults

Credibility Interval: +3.53%

Key Themes



The Coronavirus's impact on Americans is widespread with unprecedented financial and healthcare considerations.



Fear of the virus is extraordinary. Today, it is a significant obstacle for patients, driving an apparent lengthened return to “normal” for healthcare providers. Most patients indicate it will be months, not weeks, to return for electives.



Trust in providers has risen as a result of Coronavirus and is extraordinarily high. Leveraging this trust as we move forward is critical.



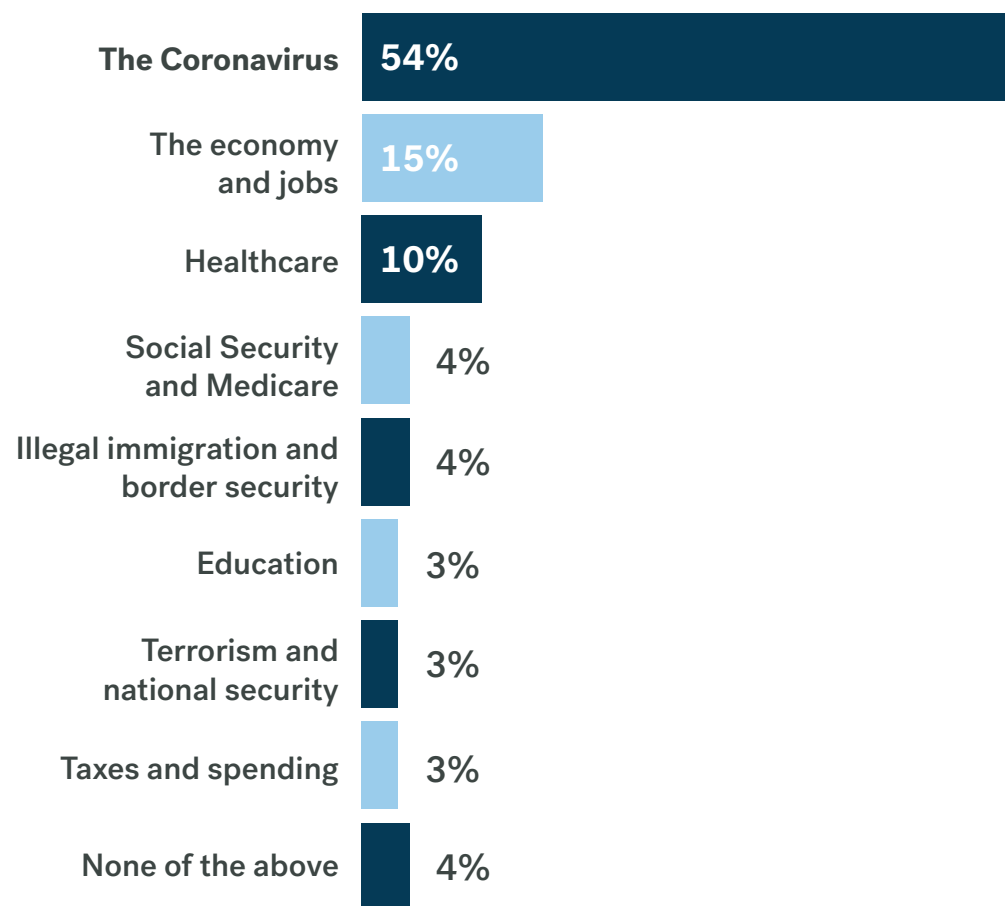
“New” modes of care are poised to stay, and there is desire for even more non-traditional modes of care.



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Pressing Issues

54% believe the coronavirus is the most important issue facing the country.



78%

are worried they or someone in their immediate family might catch the coronavirus.



Women and seniors have slightly elevated levels of concern.

	WORRIED	NOT WORRIED
GENDER		
Men	69%	22%
Women	78%	20%
AGE		
Ages 18 to 34	71%	20%
Ages 35 to 44	72%	18%
Ages 45 to 54	72%	22%
Ages 55 to 64	80%	20%
Ages 65+	76%	24%
PARENTS		
Moms	73%	22%
Dads	71%	26%

Americans across the country feel a level of concern.

	WORRIED	NOT WORRIED
HOTSPOTS		
Hotspot states	75%	19%
Non-hotspot states	73%	21%
REGIONS		
Northeast	74%	21%
Midwest	78%	19%
South	74%	22%
West	70%	20%
HEALTH CONDITION		
Has a chronic condition	76%	14%
Does not have a chronic condition	72%	26%
HEALTHCARE WORKERS		
Yes	69%	14%
No	75%	22%



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Personal Impact

45%*

personally, or someone in their household have, had a change in their employment status due to the coronavirus.

Of those,

26%

Lost their health insurance

15% Yes, lost their job

12% Yes, someone else in their household lost their job

15% Yes, had their salary or wages cut

10% Yes, someone else in their household had salary or wages cut

55% No, did not have a change in employment status

28%*

personally have, or knows someone who has been, infected with the coronavirus.

4% Yes, they have been infected

2% Yes, someone else in their household has been infected

23% Yes, someone outside of their household has been infected

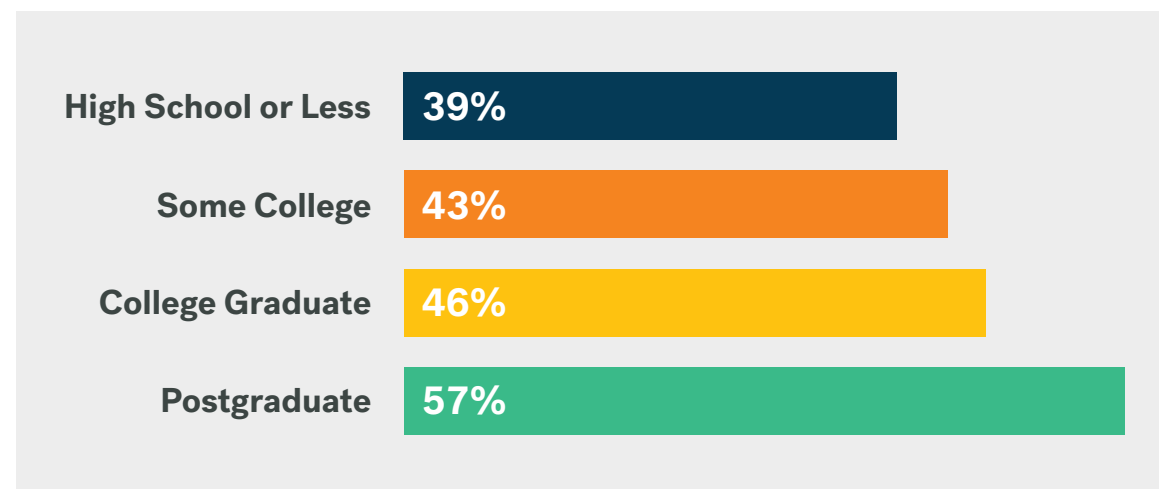
72% No, does not know anyone who has been infected

* Multiple responses accepted

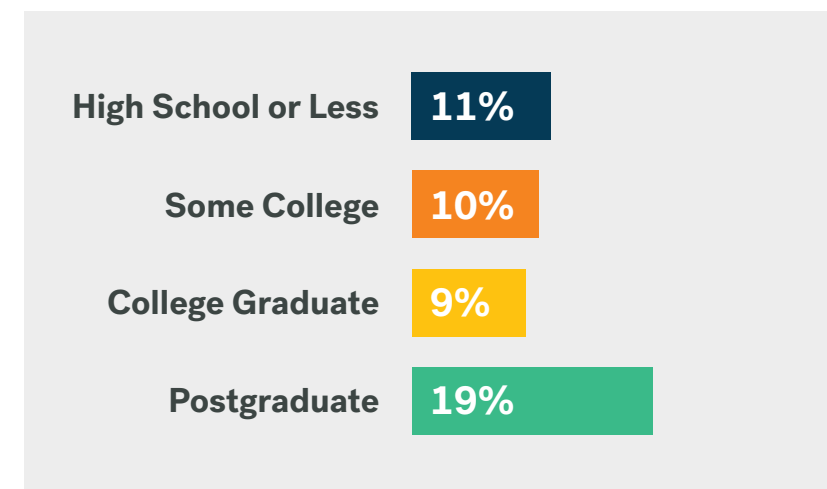
The virus is affecting people across the socioeconomic spectrum.

10% of those with private health insurance say they have lost their health insurance.

The percentage of people who had a change of employment status by education level.



*The percentage of people who **lost their health insurance** by education level.*



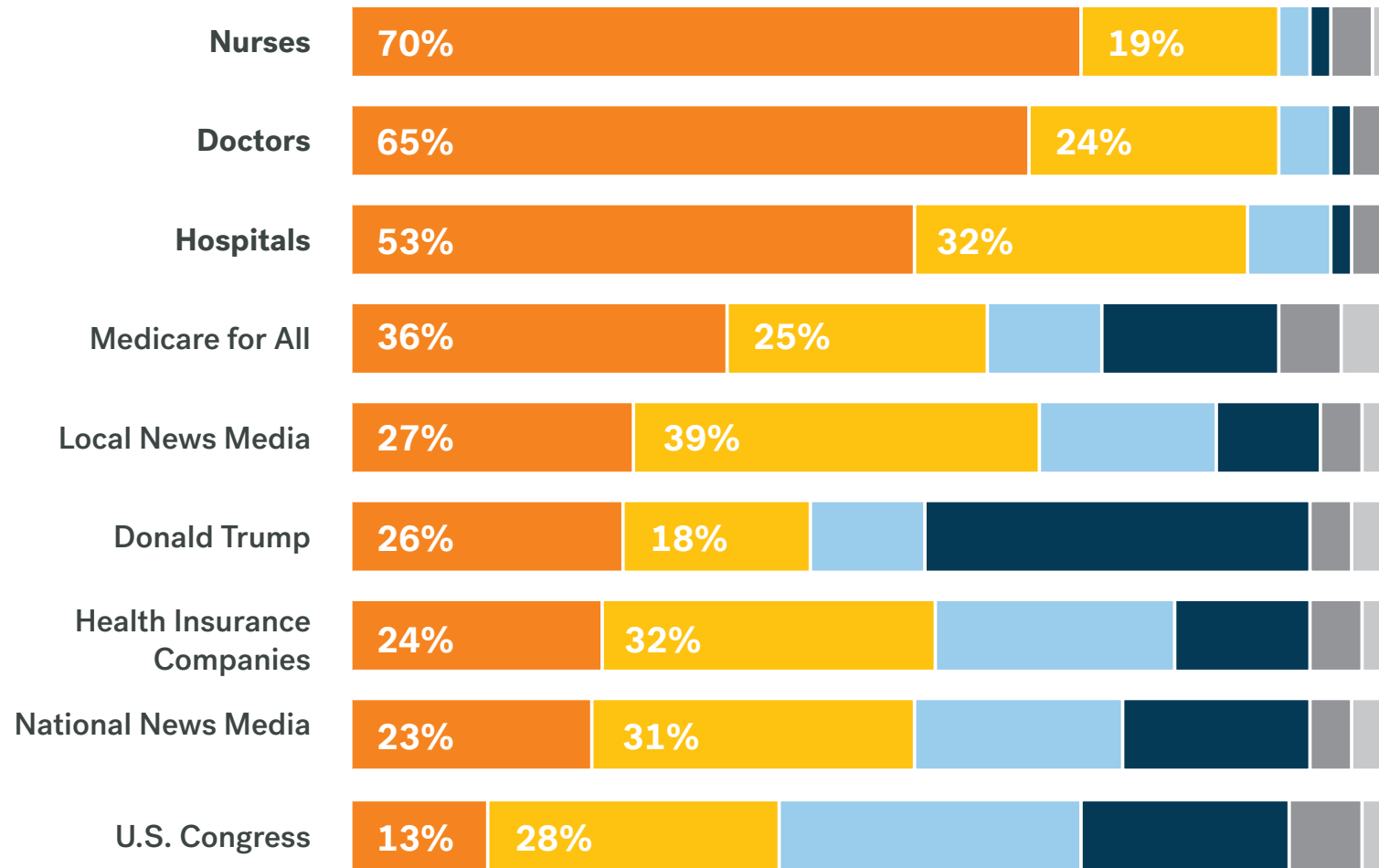


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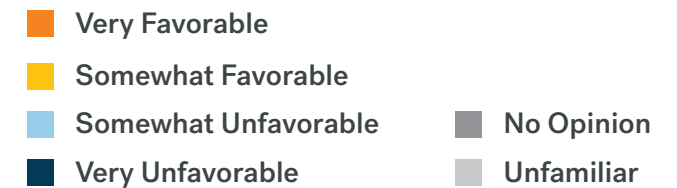
Trust + Opinions

**Healthcare providers
and hospitals are the
most trusted sources of
information on critical
healthcare issues.**

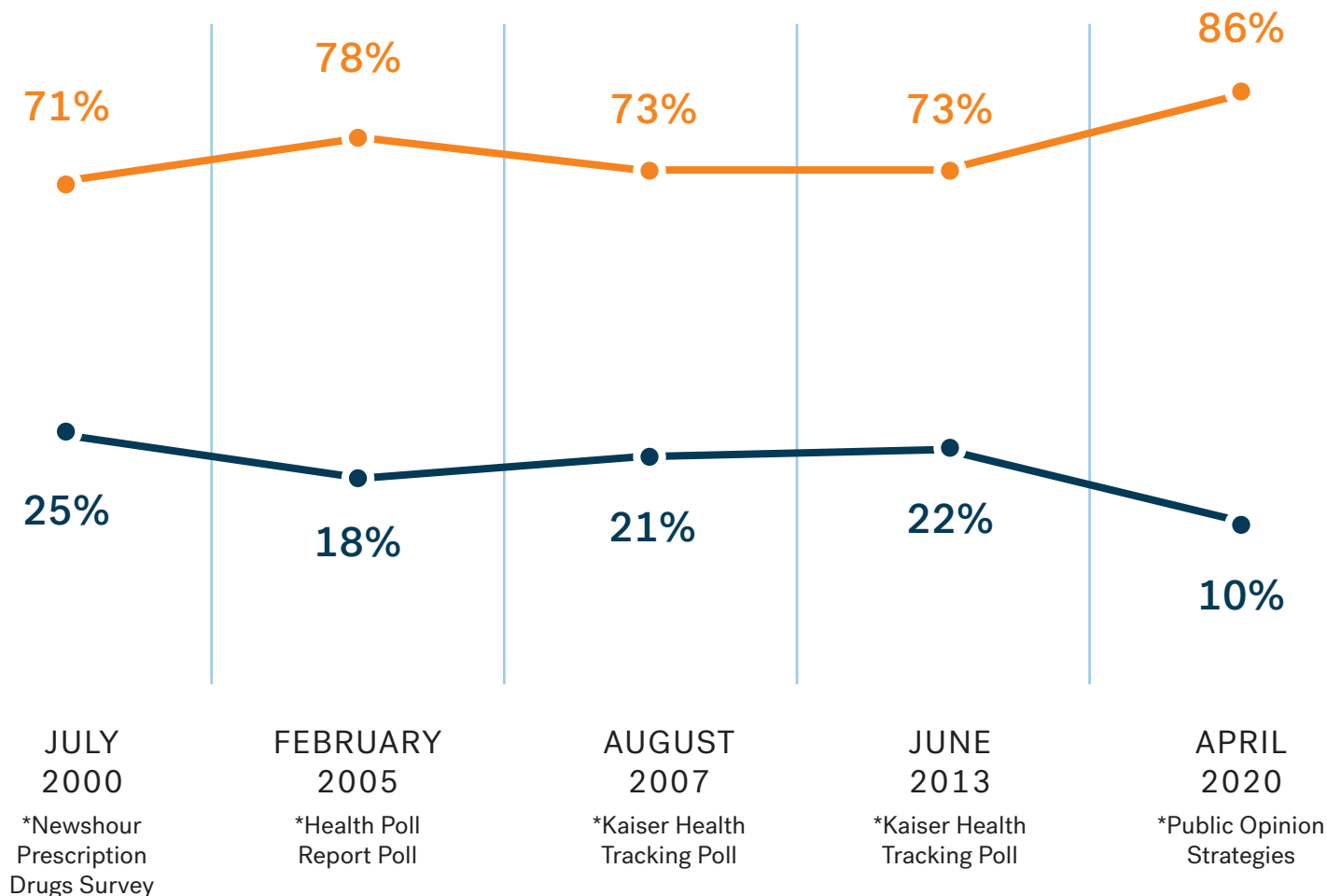
Ranked by favorability



85% +
favorable opinion for
nurses, doctors and
hospitals



Hospitals rating has spiked above its normally high favorable rating.



FAVORABLE RATINGS FOR HOSPITALS

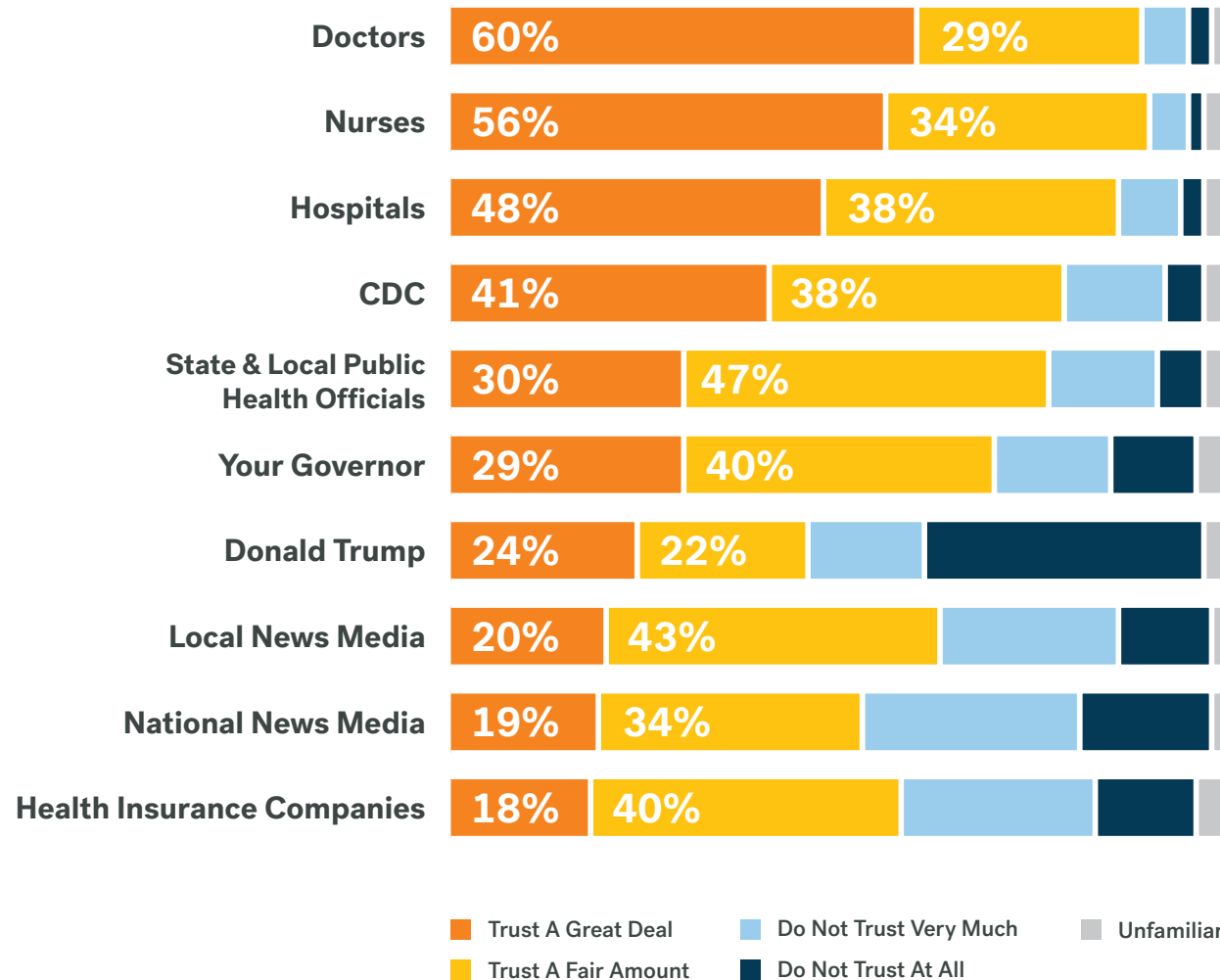
91% Seniors

87% Women

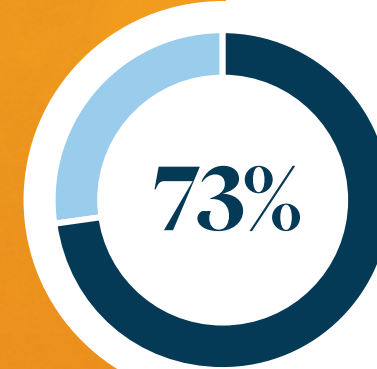
82% Moms

Ranked by trust on critical healthcare issues

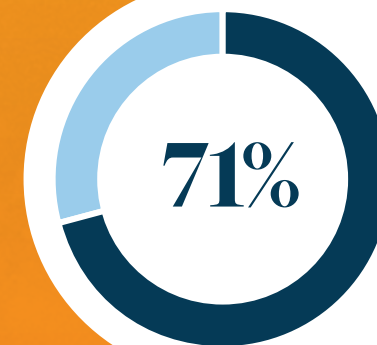
NATIONAL ONLINE SURVEY TRUST + OPINIONS | 15



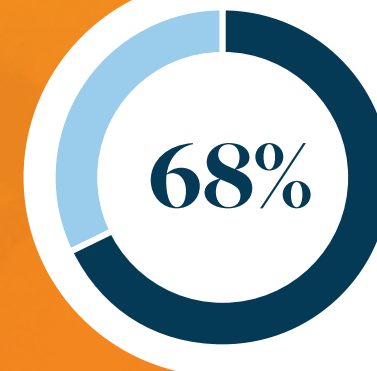
INCREASE OF TRUST
SINCE THE CORONAVIRUS



Nurses



Doctors



Hospitals

Seniors, women and moms pay significant attention to healthcare issues and have a lot of faith in hospitals.

**TRUST RATINGS
FOR HOSPITALS**

93% Seniors

86% Women

79% Moms

**TRUST INCREASED
FOR HOSPITALS**

76% Seniors

65% Women

69% Moms



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Safety

51%

rated their feelings of safety in a healthcare facility as a 5 or lower on a 10-point scale.



Women express less confidence in healthcare facility safety.

MEAN SCORE		MEAN SCORE		MEAN SCORE	
GENDER		AGE		ETHNICITY	
Men	6.0	18 to 34	5.0	White	5.4
Women	4.8	35 to 44	5.5	Black	5.1
		45 to 54	5.6	Hispanic	5.2
		55 to 64	5.3		
		65+	5.9		
TOTAL MEAN SCORE 5.4					

Even those who work, or have a family member who works, in healthcare have a mean score below 6.

MEAN SCORE	
HEALTHCARE HOUSEHOLD	
Yes, total household	5.8
Yes, self	5.9
No	5.3
TOTAL MEAN SCORE 5.4	

Regardless of how safe you feel today,

what are the most important things you could hear that would make you feel more safe going to a hospital, urgent care facility or other medical facility as a patient?

A drop in coronavirus/COVID-19 cases in your area

Total Sample 44% Women 46% Seniors 40%



Isolation of infectious diseases in separate facilities

Total Sample 25% Women 31% Seniors 35%



My doctor saying it is safe

Total Sample 25% Women 23% Seniors 40%



New sterilization/cleanliness procedures

Total Sample 20% Women 22% Seniors 19%



The government saying it is safe

Total Sample 16% Women 13% Seniors 12%



Local hospital saying it is safe

Total Sample 15% Women 14% Seniors 18%



Seeing/hearing about good healthcare experiences in your area

Total Sample 14% Women 11% Seniors 10%



The media reporting that it is safe

Total Sample 8% Women 5% Seniors 3%



Something else / none of the above

Total Sample 10% Women 6% Seniors 4%

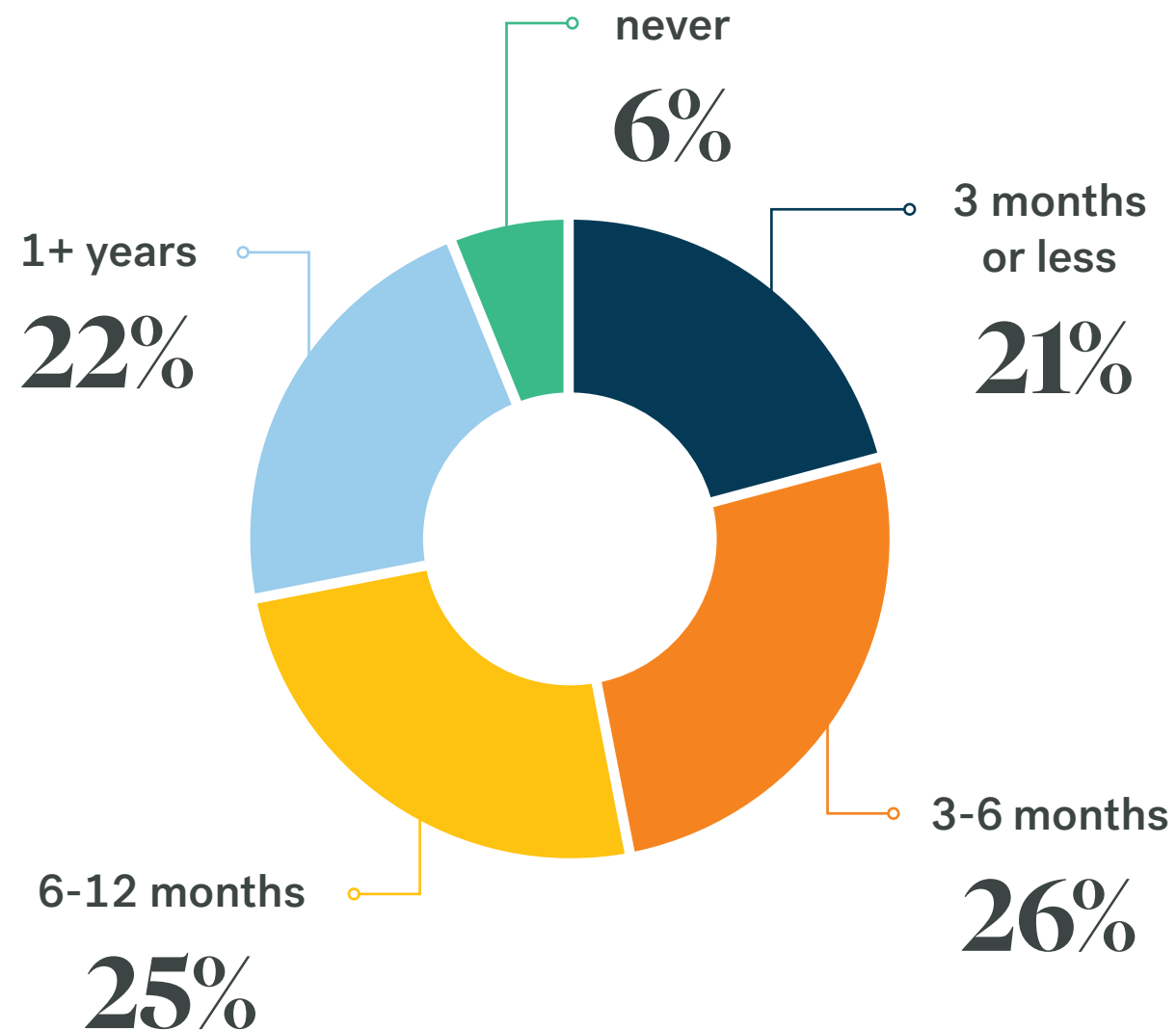




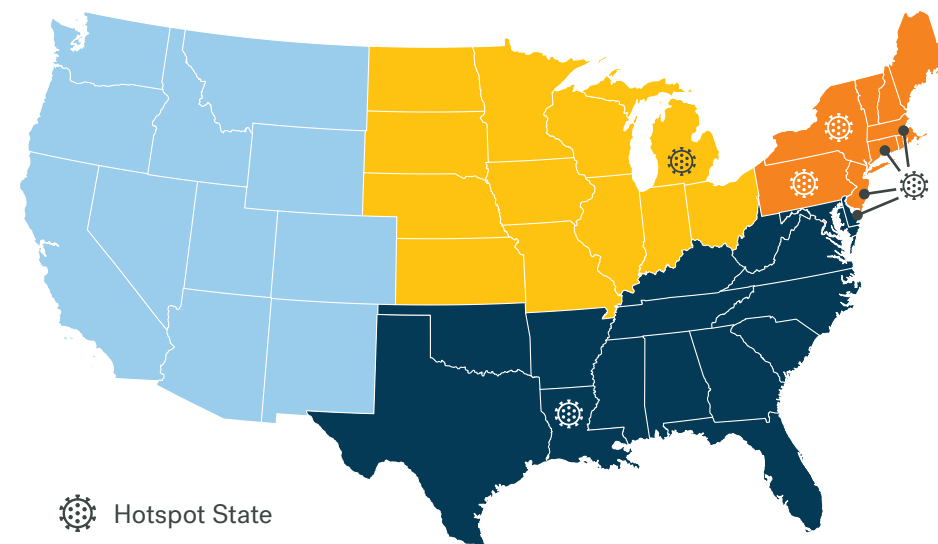
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Electives

There is a lot
of uncertainty
about when life
will return to
“normal.”



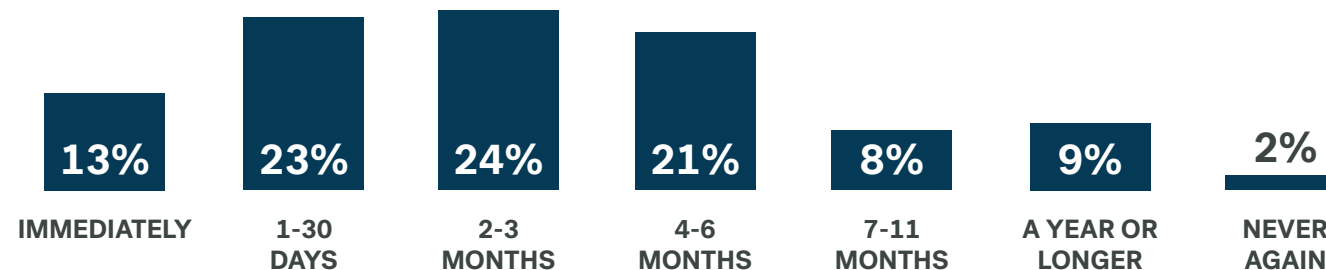
Doesn't matter if you're in a hotspot state or not, the "return to normal" timeframe is pretty similar across the country.



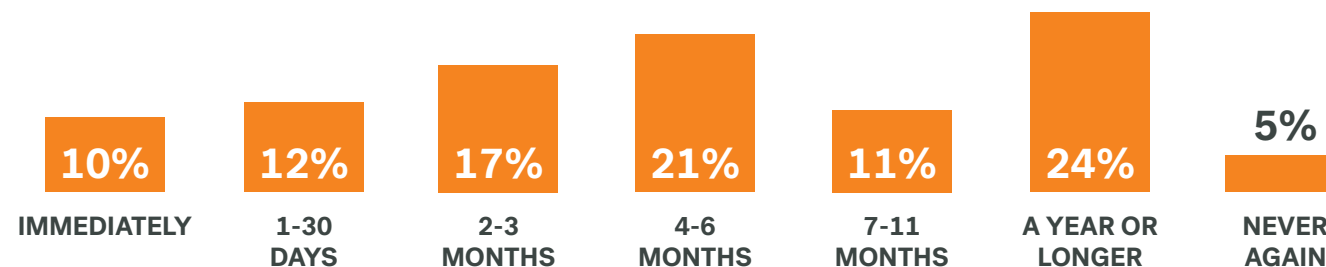
	WEST	MIDWEST	SOUTH	NORTHEAST	HOTSPOT	NON-HOTSPOT
3 Months or Less	24%	20%	17%	24%	22%	22%
3-6 Months	32%	24%	23%	27%	27%	27%
6-12 Months	20%	25%	28%	26%	26%	26%
1+ Years	20%	25%	28%	20%	21%	21%
Never	6%	7%	8%	3%	8%	8%

There is no consensus on when people will return to healthcare facilities.

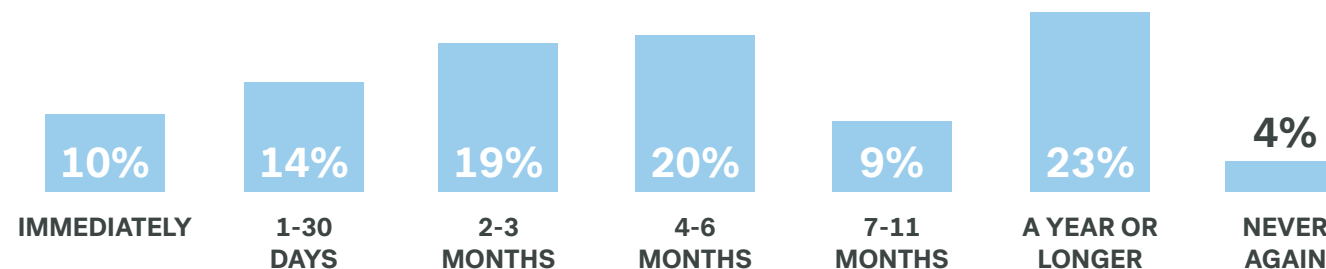
Schedule a routine visit in your doctor's office.



Schedule an elective procedure in a hospital.



Schedule an elective procedure in a non-hospital medical facility, like an outpatient medical center.



Men are more likely to schedule an elective procedure in a hospital quickly.

Seniors and women may wait a little longer.

	WITHIN 30 DAYS	2-6 MONTHS	7 MONTHS OR LONGER
GENDER			
Men	33%	39%	23%
Women	14%	36%	45%
AGE			
Ages 18 to 34	29%	29%	34%
Ages 35 to 44	36%	41%	20%
Ages 45 to 54	20%	51%	25%
Ages 55 to 64	13%	35%	48%
Ages 65+	9%	42%	47%
ETHNICITY			
White	20%	37%	38%
Black	35%	35%	25%
Hispanic	25%	42%	30%

When thinking about scheduling an elective procedure in a hospital,

those in healthcare households express a willingness to schedule more quickly, but even among this audience, less than half plan to come back within 30 days and even 20% think it will be 7 months or longer.

	WITHIN 30 DAYS	2-6 MONTHS	7 MONTHS OR LONGER
HOUSEHOLDS			
Healthcare households	43%	31%	20%
Non-healthcare households	17%	40%	39%
HOTSPOTS			
Hotspot states	25%	34%	41%
Non-hotspot states	22%	39%	34%



55%

have delayed or skipped medical care since the coronavirus spread in the United States.

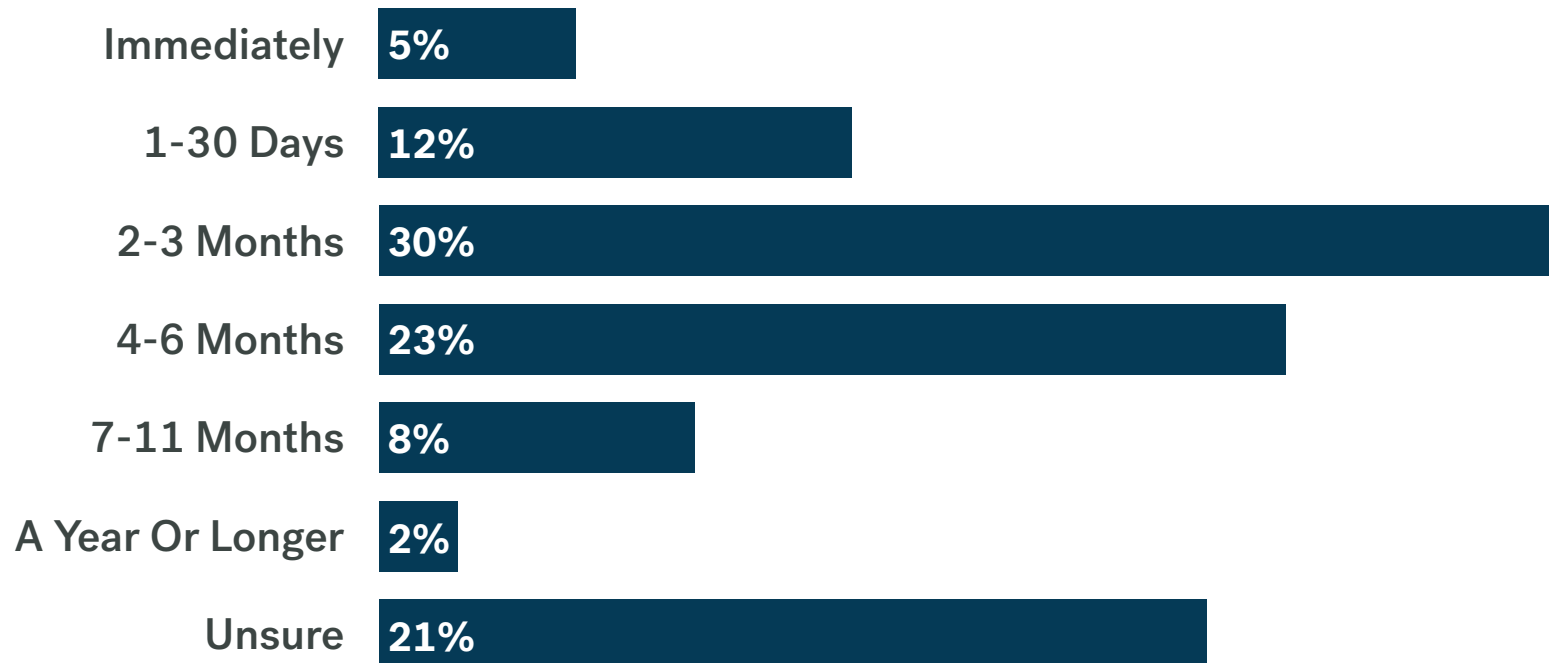
Of the 55% who delayed or skipped an elective procedure, reasons cited were:

- 53%** Hospital canceled or postponed procedure
- 35%** Did not feel safe going to the hospital or medical facility
- 20%** Loss of income
- 16%** Change of insurance



89%

are planning to reschedule the elective procedure that was delayed or skipped. Among those planning to reschedule,





45%

did not delay or skip medical care since the coronavirus spread in the United States.

Of the 45% who did not delay or skip medical care, the following were rated as potential obstacles in seeking treatment for a future elective medical procedure in a hospital.

42% Feeling unsafe in a hospital setting

18% Loss of employment or income

8% Change of insurance



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The Future of Care

Telehealth

Providers conduct medical exams or consultations through video chat, phone calls and messaging.

29%

have used telehealth for a medical exam or consultation.

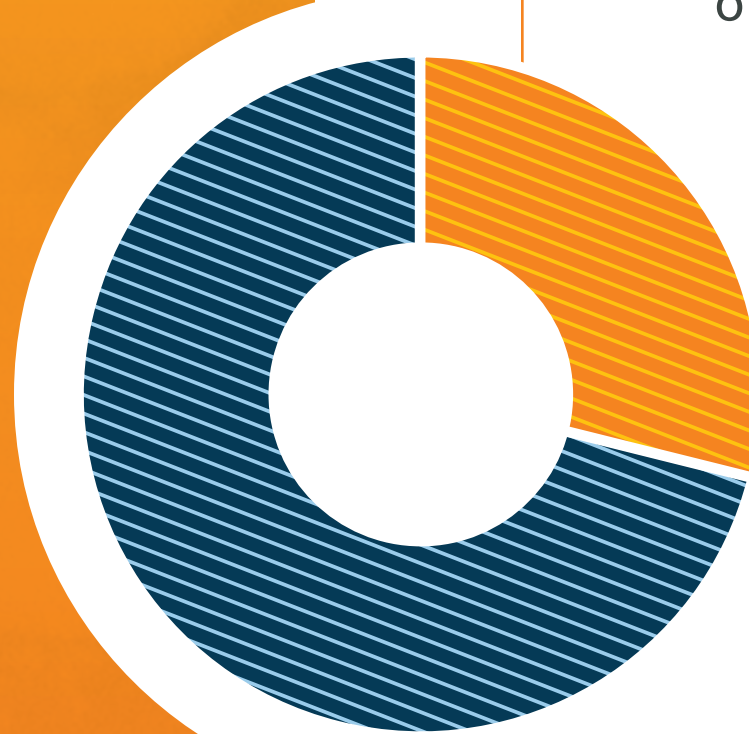
Of the 29%,

89%

Were satisfied with their telehealth experience

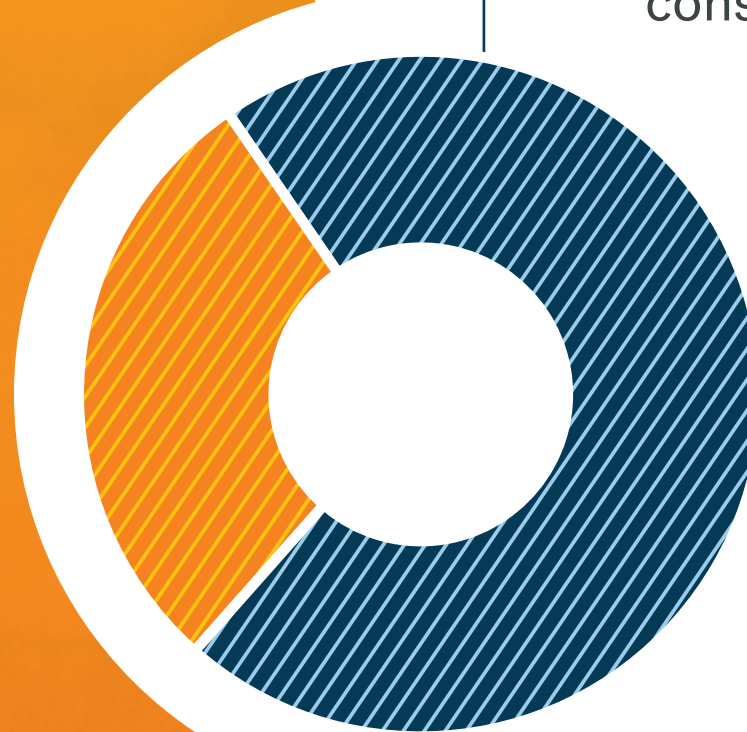
11%

Were not satisfied with their telehealth experience



Telehealth

Providers conduct medical exams or consultations through video chat, phone calls and messaging.



71%

have never received a medical exam or consultation via a telehealth appointment.

Of the 71%,

61%

Would consider using telehealth

51%

Are more likely to consider using telehealth following the coronavirus pandemic

Middle-aged Americans are more likely to consider using telehealth, while those over 55 are less likely.

YES, WOULD CONSIDER	
GENDER	
Men	62%
Women	60%
AGE	
Ages 18 to 34	62%
Ages 35 to 44	70%
Ages 45 to 54	73%
Ages 55 to 64	54%
Ages 65+	52%
ETHNICITY	
White	63%
African American	48%
Hispanic	63%

Home Recovery Care

Hospital-level care provided by doctors and other medical providers in your home (in person or through telehealth) for medical conditions, like Congestive Heart Failure, COPD, pneumonia and more.



80%

would likely use home recovery care if it was covered by their insurance.

Americans are split on the focus of healthcare in the future.

43%

believe we should focus on **disease prevention** and wellness so people are healthier.



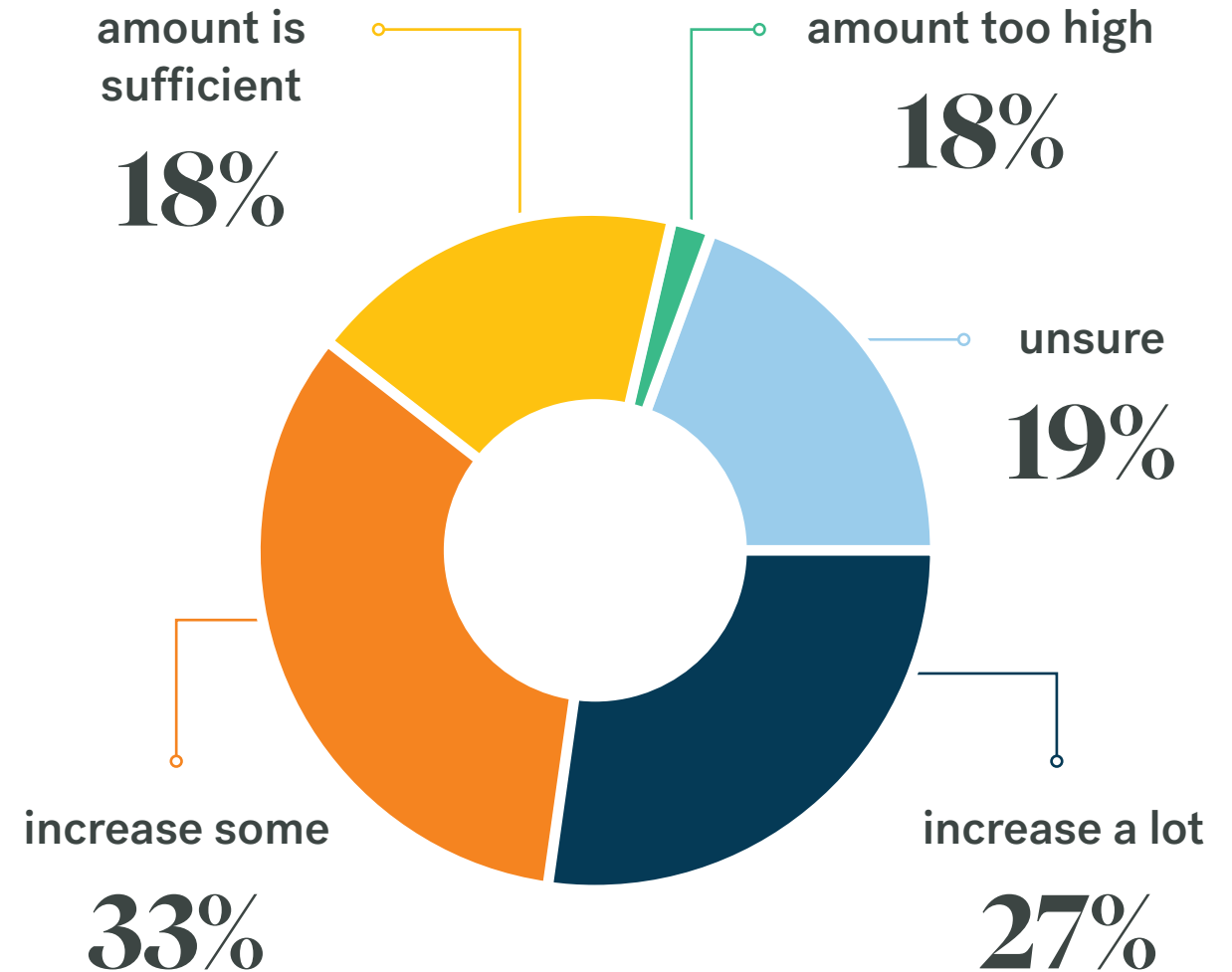
52%

believe we should focus on **hospital preparedness** to deal with any future disease outbreaks or emergency situations.

5%

No strong opinion/Undecided

Based on what was included in the first stimulus package, Americans believe hospitals require more funding.



Today,

the coronavirus appears to have people more focused on their overall health moving forward.

83%

intend to live a healthier lifestyle - like eating healthier and exercising more - moving forward into the future.

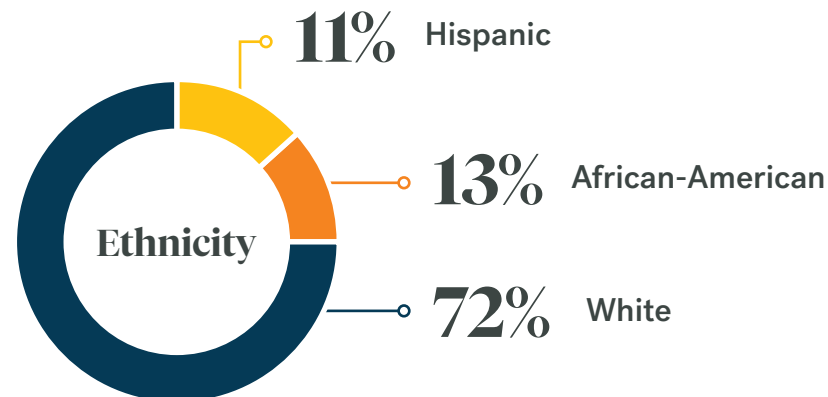
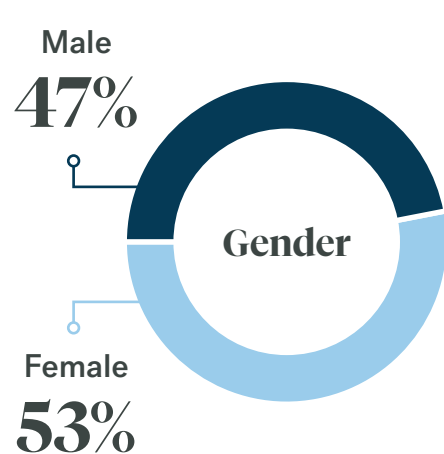




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Demographics

Demographics



Age

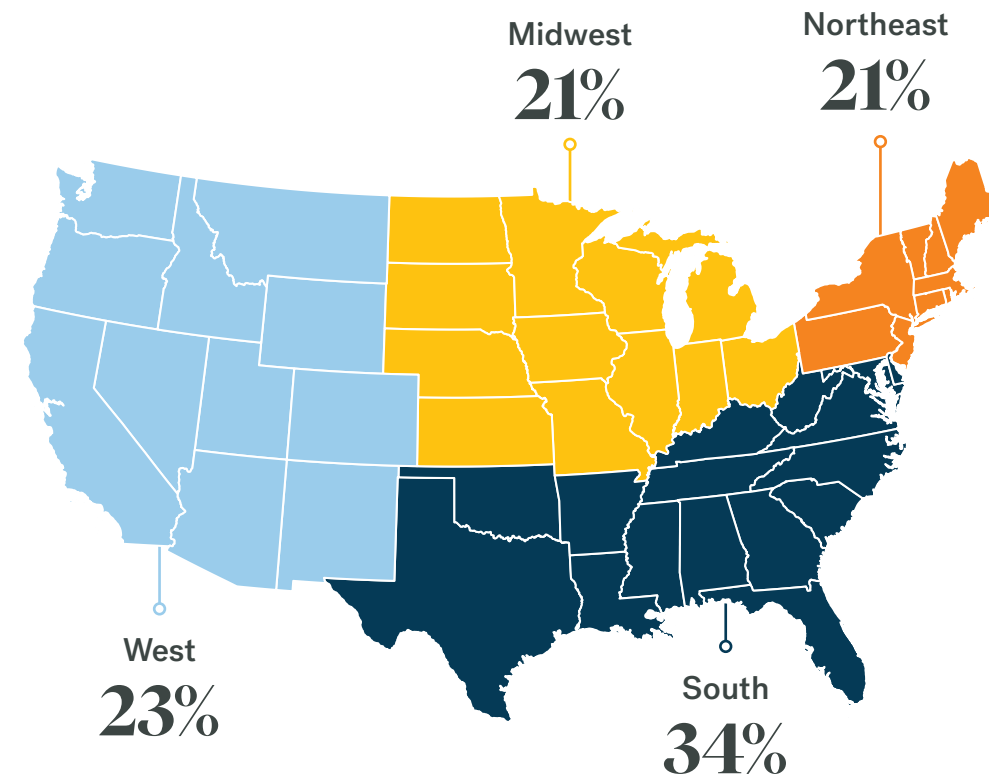
31%	18 - 34
19%	35 - 44
16%	45 - 54
18%	55 - 64
17%	65 +

Education

28%	High School or Less
25%	Some College
31%	College Graduate
16%	Post Graduate



34%
Are Parents



Urban 38% **Suburban 48%** **Rural 12%**

Key Themes



The Coronavirus's impact on Americans is widespread with unprecedented financial and healthcare considerations.



Fear of the virus is extraordinary. Today, it is a significant obstacle for patients, driving an apparent lengthened return to “normal” for healthcare providers. Most patients indicate it will be months, not weeks, to return for electives.



Trust in providers has risen as a result of Coronavirus and is extraordinarily high. Leveraging this trust as we move forward is critical.



“New” modes of care are poised to stay, and there is desire for even more non-traditional modes of care.