nrc HEALTH | Human understanding

MAY 2020 REPORT

Consumer-sentiment data on the coronavirus pandemic

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05.25.1

Introduction

Though the COVID-19 pandemic is far from over, there are promising signs that the worst may be behind us. Fear over the virus is gradually easing its grip on American public affairs, and NRC Health's surveys have detected new notes of optimism in consumer sentiment.

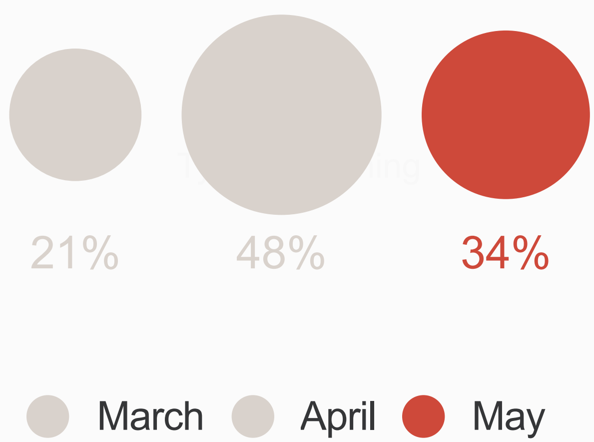
The situation remains delicate, however. As health systems begin to resume normal services, they may benefit from examining consumers' concerns and adjusting their approach to meet them.

To that end, a few of NRC Health's most pertinent findings are outlined here.

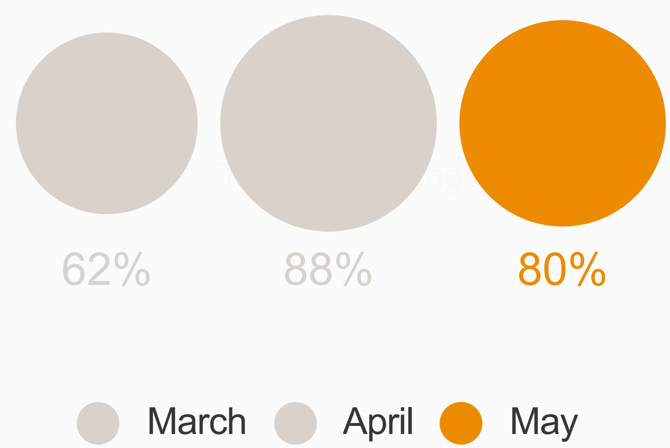
Consumer perceptions of the coronavirus

How concerned are you about the coronavirus?

Everyone is at risk



Moderately or highly concerned



Consumer perceptions of the coronavirus

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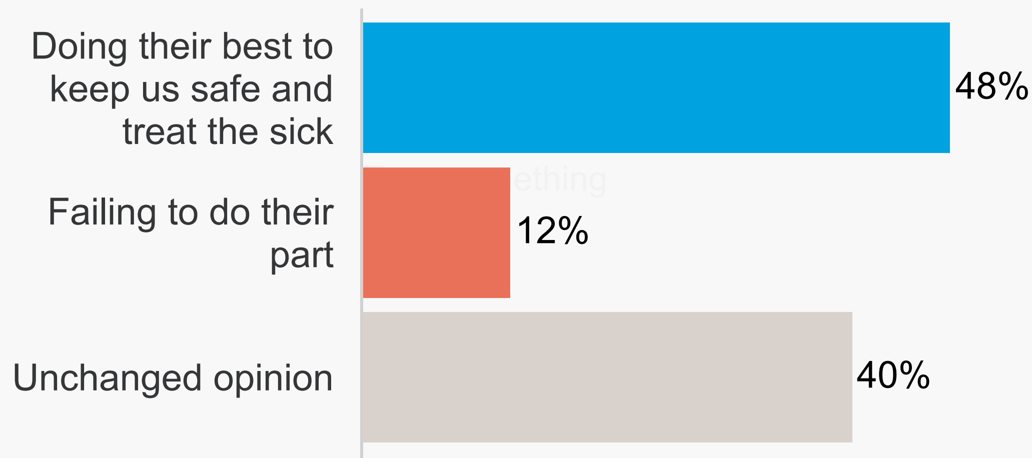
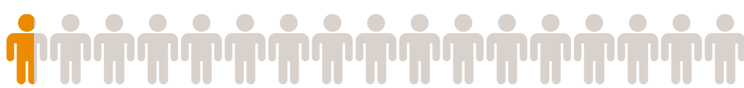
19% of respondents are extremely concerned about their own personal health

Consumers believe healthcare organizations are:

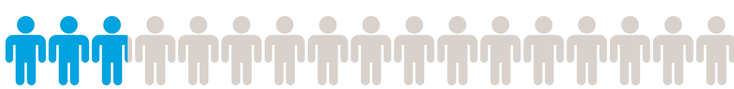


Consumer perception of the coronavirus

How likely do you feel it is that you will contract COVID-19 within the next 6 months?

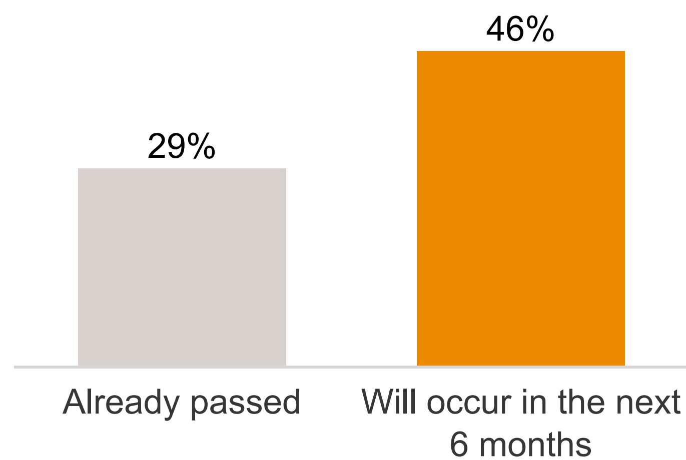


4% Extremely likely



17% Gen Z (18-23): Not at all likely

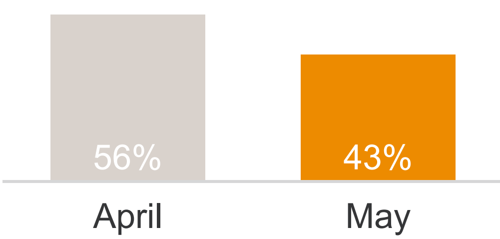
When do you believe the peak of the pandemic will occur in your local area?



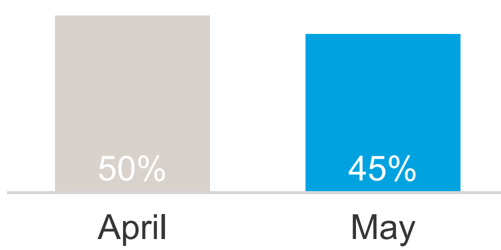
What consumers are worried about

Due to COVID-19, how worried are you about the following?

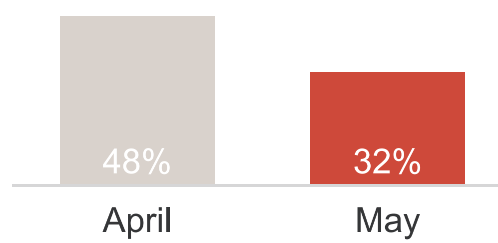
Concerned about significantly or somewhat worsened **mental health**



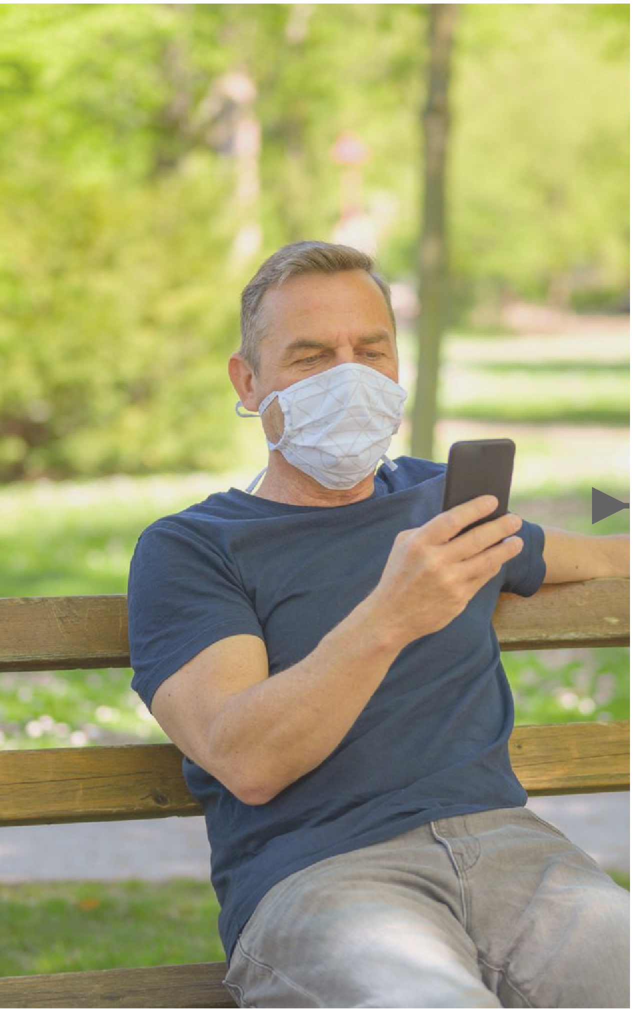
Extremely concerned about **economic impact**

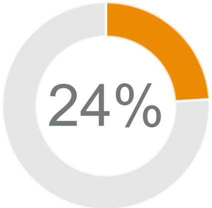


Very concerned or extremely concerned about **access to food**

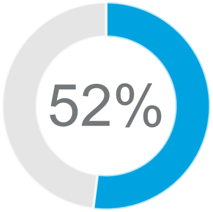


How consumers are responding

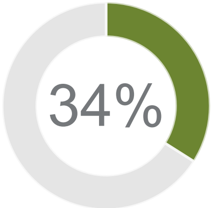




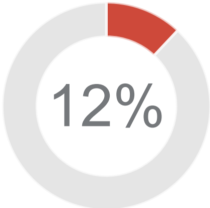
of consumers are feeling comfortable enough to visit their doctor now, in person, for routine visits or other needs.



of consumers have delayed healthcare services for themselves or someone in their household—the highest percentage being for primary-care and dental visits.



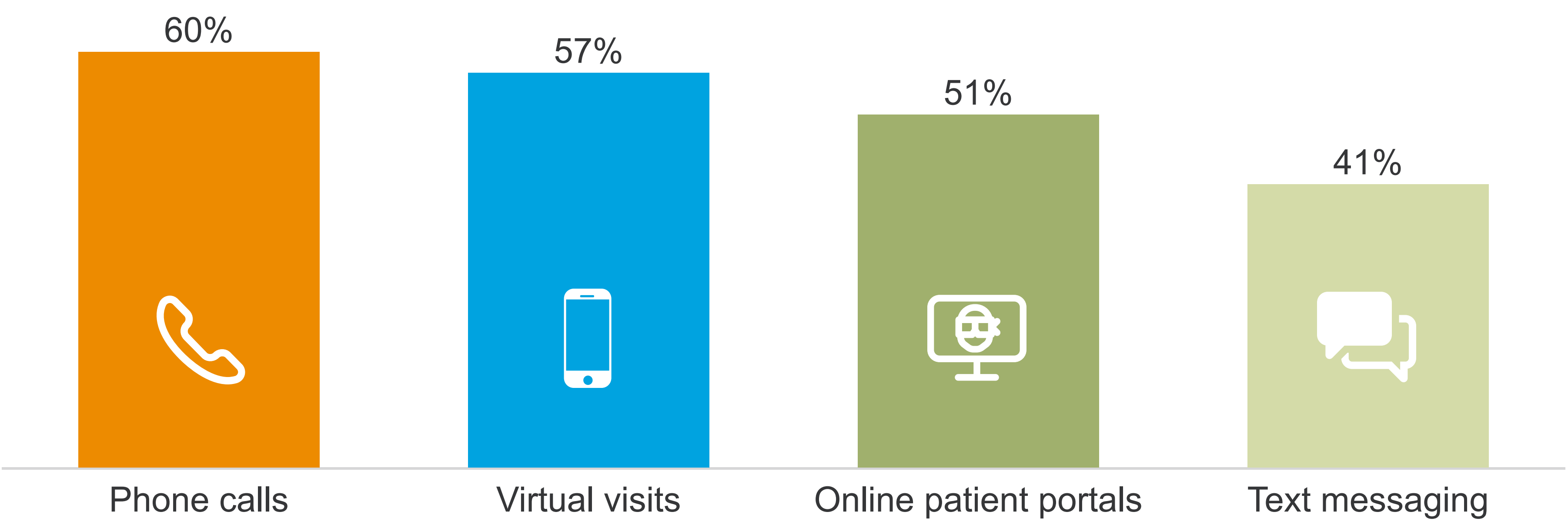
of consumers have had a virtual or e-visit with a medical professional in the past 3 months.



of consumers without virtual or e-visit experience in the past 3 months have instead chose to visit their doctor's office in person.

Consumer desire for alternative care delivery

People are somewhat or very interested in using the following modes of communication, instead of attending an in-person doctor's appointment for non-emergency medical needs.



Consumer comfort with elective surgery

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When do you anticipate feeling ready to have an elective medical procedure?

21%

Don't know

13%

Wait at least a year

When rescheduling your surgery, would you prefer it to be at a hospital or a surgery center?

60%

of consumers said they would prefer their procedure in a surgery center

What consumers expect from healthcare post-pandemic

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Consumer expectations for healthcare facilities after the height of the coronavirus crisis.

47%

of consumers feel staff should always be required to wear masks.

38%

of consumers said patients and visitors should be required to wear masks.

37%

of consumers feel it should be a requirement to have their temperature taken upon entry to a healthcare facility.

11%

of consumers want no visitors allowed in a hospital. 34% believe this should only happen during a high-risk time.

Survey methodology

NRC Health conducted a nationwide online survey of consumers aged 18 and over to learn about their perceptions of the coronavirus pandemic and how it is impacting the United States. In total, 2,000 responses were collected from May 18–20, 2020, giving the data a 2.2% error range at the 95% confidence level. Responses were collected and analyzed aggregately, by gender, and by age/generation groupings; the breakouts of these groups are shown below.

Gender distribution

· Male—26% of total respondents

· Female—73% of total respondents

Age/generational distribution

· Generation Z (defined as ages 18–23)—20% of total responses

· Millennials (defined as ages 24–39)—20% of total responses

· Generation X (defined as ages 40–55)—20% of total responses

· Baby Boomers (defined as ages 56–75)—20% of total responses

· Silent Generation and Greatest Generation (defined as ages 75+)—20% of total responses

Regional distribution (regions as defined by the United States Census Bureau)

· West—23% of total responses

· South—36% of total responses

· Midwest—24% of total responses

· Northeast—17% of total responses

More to come

The COVID-19 pandemic is an evolving situation, and consumer sentiment is bound to evolve with it. We'll continue to update our findings as we discover more about what consumers are thinking.

In the meantime, if you have questions, suggestions, or curiosities you'd like addressed, please reach out to our survey team at info@nrchealth.com.

For more than 39 years, NRC Health (NASDAQ: NRC) has been committed to achieving human understanding and bringing healthcare organizations closer to their customers than ever before by illuminating and improving the key moments that define an experience and build trust. Guided by its uniquely empathic heritage, proprietary methods, skilled associates, and holistic approach, NRC Health helps its customers design experiences that exceed expectations, inspire loyalty, and improve well-being among patients, residents, physicians, nurses, and staff.