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HEALTH

Human understanding

NRC HEALTH REPORT

APRIL 2020

Consumer-sentiment data on the coronavirus pandemic

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Introduction

The COVID-19 pandemic has affected every aspect of American life. Small wonder, then, that it has dramatically shaped consumer sentiment.

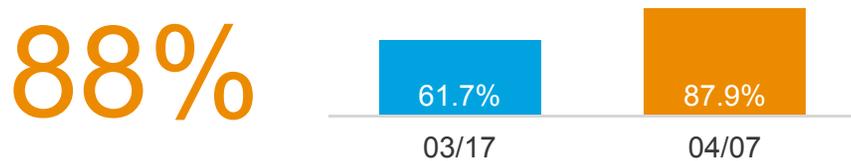
NRC Health has been fielding surveys to consumers as the situation develops. What we've learned may be helpful as health systems seek to stay connected to their customers throughout this ongoing crisis.

Highlights from our findings are presented below.

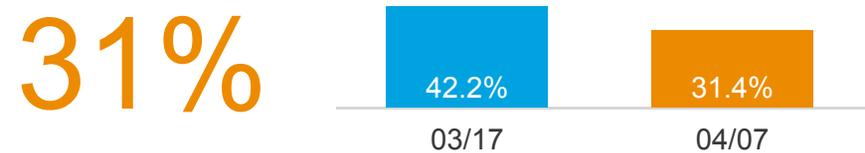


Consumers are taking the pandemic much more seriously

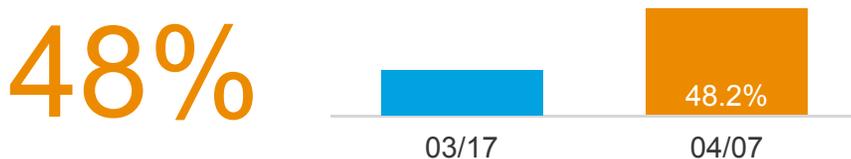
When comparing consumer responses fielded by NRC Health between March 13 and March 17 to responses fielded between April 3 and April 6, it is clear consumers are taking the coronavirus pandemic much more seriously.



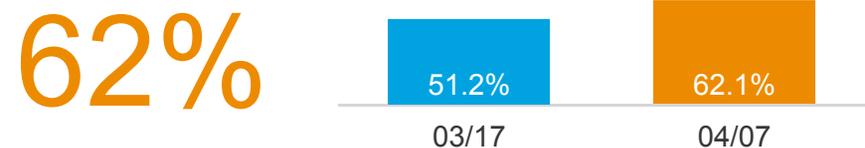
of consumers are moderately or highly concerned about COVID-19, which increased by 26% over results from NRC Health's previous survey, fielded March 13-17, 2020.



Consumers' confidence in the healthcare system has waned. 42% believed the healthcare system was equipped to handle COVID-19 in the March survey, compared to 31% today.



The percentage of consumers who believe everyone is at risk for COVID-19 has more than doubled during the last three weeks.



of consumers believe the government needs to play a major role in managing COVID-19, which increased from 51% of respondents previously.



Consumer perception of the coronavirus



20% 
of consumers or someone they know have had COVID-19.

17% 
think they're very likely or extremely likely to get COVID-19.

77% 
consider themselves very well or extremely well informed about COVID-19.

What consumers are worried about



79%



The vast majority of consumers are very concerned or extremely concerned about the economy.



54%



are very concerned or extremely concerned about getting the meds or medical care they need.



56%



say their own mental health has worsened.



48%



of consumers are very concerned or extremely concerned about access to food.

How consumers are responding



53%



of consumers have delayed care for themselves or someone in their household.

55%



of consumers want strict social-distancing measures implemented across the U.S., until a treatment or vaccine is available.

37%



of consumers first call their PCP if they suspect they have COVID-19 symptoms. The second-most popular decision is to self-quarantine for 14 days (21%).

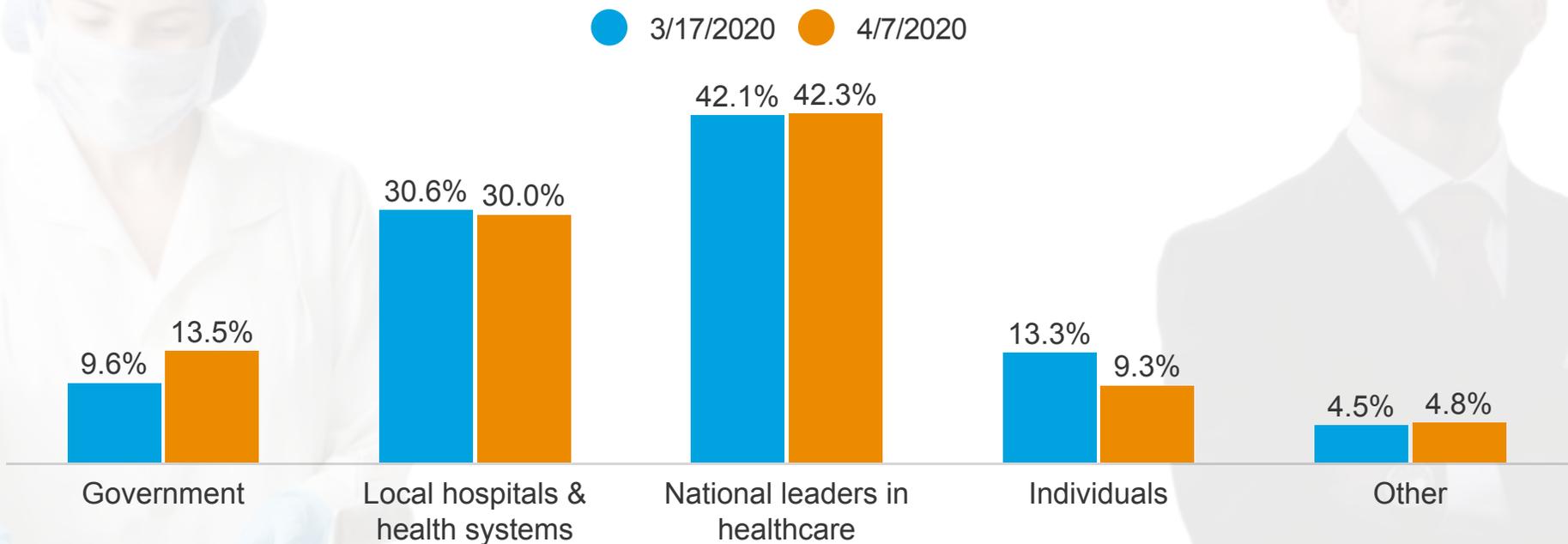
Whom consumers turn to

 **72%**

of consumers **trust local hospitals or national healthcare leaders** to handle the crisis more than they trust the government.

 **13%**

of consumers **trust the government** to handle the crisis.





How consumers are thinking about healthcare



50%



of consumers have a more positive view of healthcare organizations since the start of the outbreak.

69%



of consumers said that the healthcare system as a whole is NOT ready to handle the outbreak.

71%



of consumers are very or extremely concerned that their local hospital lacks the capacity to handle COVID-19 cases.

49%



of consumers are very or extremely concerned about the costs of tests/treatment, and 64% are concerned about the availability of tests.



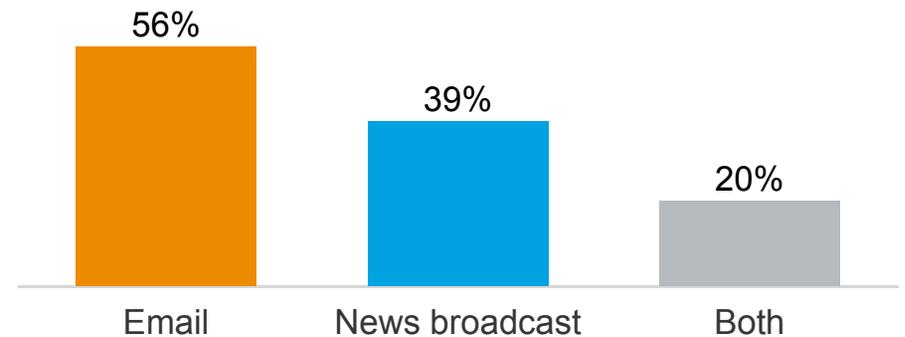
What consumers want from their providers

72%

of consumers think there is an elevated risk or would not seek care.



How consumers would prefer to receive COVID-19 information:





Consumer desire for alternative care delivery

Perhaps because of the elevated risk, respondents expressed an interest in alternative delivery methods. The following percentages refer to the percentage of consumers somewhat or very interested in the following care-delivery methods for non-emergency medical needs.





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, 2,004 responses were collected from April 3-6, 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—33% of total respondents
- Female—66% 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 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 their 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.