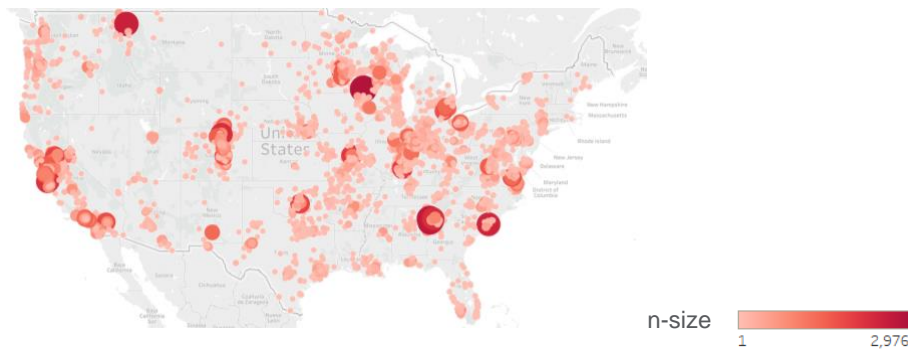


What matters to your patients in the time of COVID-19?

As a healthcare organization, you are going through one of your most difficult phases ever as you navigate the uncharted waters of COVID-19. At the very heart of your response, though, remains your desire to do everything in your power to bring the best care to the patients and communities you serve.

In early March, we shared with you that patients everywhere were feeling anxious and looking for empathy. We have now analyzed more than one million patient comments (over 22,000 of which were specifically about COVID-19). These comments are from 23,000 locations across 50 states and over 20,000 ZIP codes to bring you the following four insights as we all deal with an unprecedented healthcare, economic, and human crisis. This analysis is based on NRC Health's text analytics, including natural language processing, machine learning, and sentiment modeling.

MAP OF COVID-19 FEEDBACK



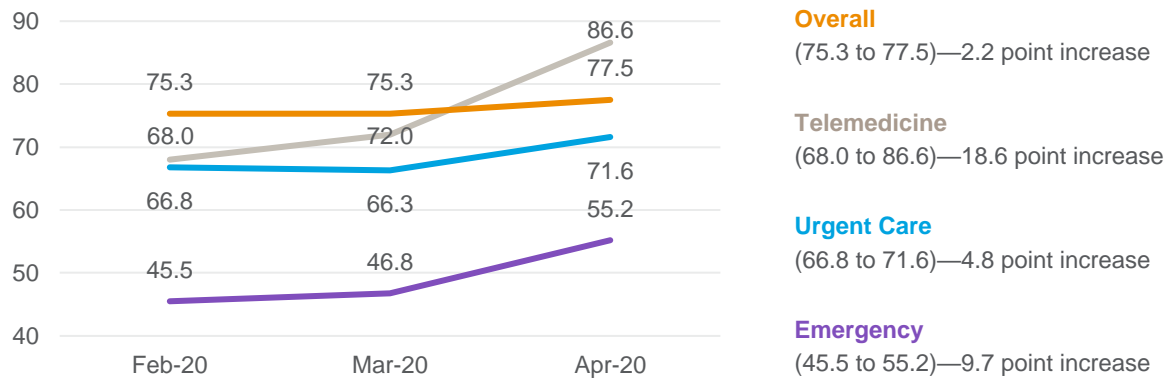
INSIGHT #1: PATIENTS TRUST AND VALUE YOUR CARE, NOW MORE THAN EVER.

Based on our analysis of patient comments from across the nation, the first insight we can all feel proud of is the insight that patients now value their healthcare providers more than ever. There has been a universal two-point increase in Net Promoter Score (NPS) between February 1, 2020, and April 24, 2020, from 75.3 to 77.5; there has also been a sharp increase in NPS, even during the pandemic, for those service lines that involve a high volume of patient touchpoints.

"Thank you so much for the love and care that the entire team - from the attending physician to the staff cleaning our room - showed my son and me during our stay at the hospital. I also appreciate the well coordinated effort around the hospital's COVID-19 precautions. Everything was well explained. It is a scary and uncertain time, especially when you have to take a child to the hospital right now. The staff at all levels was calm, coordinated and continued to provide exceptional care under the circumstances. I appreciate seeing all kinds of hospital team members checking temperatures and handing out masks. It gave me great comfort in our regional health care system. Thank you from the bottom of our hearts." —Patient in Ohio

"Thank you for your service during these times with COVID-19. You are heroes!" —Patient in Texas

More than 75% of assigned sentiments within our sample of COVID-19–related comments were positive. Patient sentiments currently indicate a more positive view of healthcare organizations, and patients are taking the effort to send shout-outs to your teams.



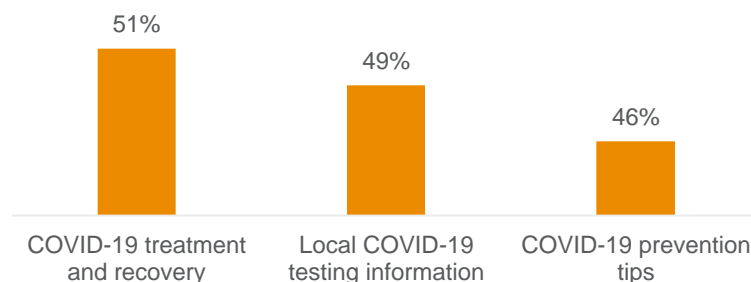
Patients are also showing a greater inclination to praise the providers they view as heroes. Comments like this one, from a patient in New York, are common and inspiring:

"My provider was a true blessing even amid the COVID phenom, she was present, attentive, and compassionate. I am grateful to have her as my provider." —Patient in New York

NRC Health recommends sharing positive comments with staff: Nothing motivates your staff more than understanding the impact they have on the communities they serve. Patient praise can also help you mitigate the extreme risk of burnout among your teams, especially during trying times. Share positive comments in your recognition platforms, post them in breakrooms, and send personal notes to those highlighted. For NRC Health partners, you can find all your patient compliments in your COVID-19 Analytics Dashboard (located in your Analyst Corner).

INSIGHT #2: YOUR COMMUNITY IS LOOKING TO YOU AS LEADERS FOR INFORMATION AND EDUCATION.

According to our latest consumer study, 58% of consumers would like to receive information from you on COVID-19, as frequently as every day. The most requested topics of information are:

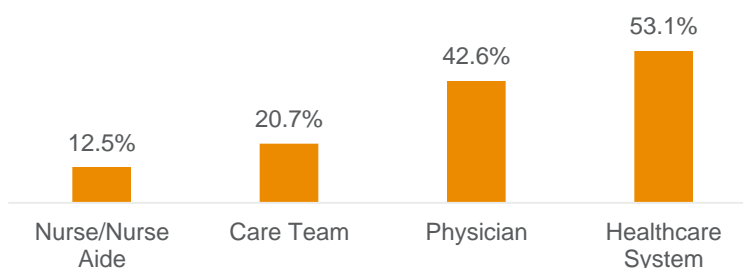


We are seeing a similar trend reflected in patient feedback on recent hospital experiences. Where patients have mentioned COVID-19 in their comments, their sentiment usually centers on information and education from hospitals.

“I was nervous about the appointment because of the COVID-19 environment. A conversation with office personnel a few days before the appointment put me at ease.” —Patient in Oklahoma

*“Doctor and staff took extra time to explain signs and symptoms of coronavirus and exam procedures and asked if I needed refills or any problems with meds. My wife even commented about the thoroughness of my exam. He is a good doctor really concerned about his patients.”
—Patient in Indiana*

“Information/Education” is one of the three most commonly assigned sentiments in our analyses of COVID-19–related comments. In fact, 43% of COVID-19–related comments are related to information and education. We find that patients believe that your teams are doing a good job providing information and education, with the most positive kudos given to physicians, care-team staff, and nurses.



NRC Health recommends proactive communication on COVID-19: Use your brand strength and community presence to provide frequent and accurate information about COVID-19. Use the right mode (e.g., email, text), cadence (e.g., daily, weekly) and messaging (e.g., testing, prevention, guidelines) to break through the clutter of information that every community is dealing with. Per the consumer study referenced above, 72% of consumers most trust local hospitals or national healthcare leaders to handle this crisis—which means that no one is more trusted or in a better position to provide highly desired information to your community than you.

INSIGHT #3: PATIENTS ARE STILL ANXIOUS.

Despite patient trust and gratitude, we see a high level of anxiety among current patients, mainly due to the evolving nature of the pandemic. Right now, 60% of consumers think they face an elevated risk when visiting their providers.

“I was extremely disappointed that a COVID-19 test was not administered to me. I have been exposed to my husband, who had symptoms for three weeks. He was also getting tested, but he had symptoms. I did not have any symptoms at the time of my visit, and staff advised that supplies were low so they did not view my request as critical. I see all the publicity regarding testing in the city, and I am still unable to get tested.” —Patient in New York

“My daughter and I were extremely worried about going to the clinic due to COVID-19. I was pretty much required to keep my appointment, due to my eye condition. I was impressed with the screening process; people coming and going in and out of the clinic door had masks on, in addition to employees inside. Also, by them limiting the number of patients, we felt that we were not being exposed to the virus. If the situation persists, I will not be so afraid next time.” —Patient in Wisconsin

Our text analytics are showing a higher propensity for alerts related to mental health and mistreatment/abuse in those patients who have left a comment related to COVID-19. Our consumer study shows that more than 44% of all respondents (with Generation Z and Millennial respondents being maximally represented) are concerned or extremely concerned about their mental health.

While wait times continue to be an area of concern for all patients, those mentioning COVID-19 are looking for more information, education, and professional skill from their providers. Because of the disruptions that COVID-19 has caused to the healthcare environment, patients not mentioning COVID-19 are more concerned with scheduling and the ability to include friends/family in their care experience.

TOP NEGATIVE THEMES FOR COVID-19 MENTIONS:

- System/Organization—Wait Times
- Provider—Professional Skill
- Provider—Info/Education

TOP NEGATIVE THEMES FOR NON-COVID-19 MENTIONS:

- System/Organization—Wait Times
- System/Organization—Scheduling
- System/Organization—Friends/Family Accommodation

“The nurses were great, but the nurse who administered the shots put on her gloves and then touched the doorknob, door, and other objects in the room prior to administering the shots to our 4-month-old, including touching his face and head with the gloves. This was disappointing, as we are doing everything imaginable to prevent illness, especially during a pandemic, and in this instance gloves were not used properly and the nurse may have exposed our son to contamination.” —Patient from Nebraska

A comment from another patient in Minnesota highlights the extra stress and anxiety that can be caused by not being able to have support from friends and family during care:

“I realize that with COVID-19 going on, you are not supposed to have someone with you. HOWEVER, I was so confused after my motorcycle accident last night that I could not remember things to tell the doctor. The reason I needed my mom there was that she was there..and a nurse. I really should have had a CT scan done on my head. I don't think I mentioned the confusion to the doctor. The only thing mentioned on my ED discharge sheet was the wrist...the doctor also stated, after I told him about my legs hurting, "I don't see any blood on your jeans, so they are OK." I was confused at the time, so I did not say anything. EXTREMELY unhappy with the treatment I received. After any type of MVA, you should have head imaging done.” —Patient from Minnesota

NRC Health recommends remaining sensitive to patients' anxieties: 71% of consumers are very or extremely concerned that their local hospital lacks the capacity to handle COVID-19 cases. While members of your clinical and administrative teams are using an all-hands-on-deck approach to treat the unprecedented influx of patients, remain sensitive to the fact that patients are anxious, as is to be expected in such emotional times. We recommend addressing all capacity concerns as part of your proactive communication, and emphasizing to your teams that they should be clear about skills and expertise they have. “Managing up” is now more important than ever.

INSIGHT #4: CARE TOUCHPOINTS ARE CHANGING, LED BY THE RAPID ADOPTION OF TELEMEDICINE.

Traditional care touchpoints have seen a rapid drop due to shelter-in-place and social-distancing measures. According to our consumer study, 53% of consumers have even delayed healthcare due to COVID-19. The only major exception among all service lines is for telemedicine.

Around 40 healthcare organizations have been using NRC Health's best-practices library for telemedicine, and we've seen a massive growth in telemedicine feedback since the advent of COVID-19. Since the pandemic started, we've seen a nearly 30-times increase in the number of patients providing feedback on their recent telemedicine experience...and patients seem to love engaging with you through this digital front door!

Equally exceptional, telemedicine's net promoter score (NPS) has skyrocketed. From April 2019 to April 2020, telemedicine's NPS has increased by 125%, from 65.6 to 82.6. Patients have been logging overwhelmingly positive responses around their telemedicine experiences.

NRC Health recommends building on the gains you've made in telemedicine: Our analysis of COVID-19-related comments around telemedicine points to such a positive experience that we believe patients hope this will continue to be an option in the future. In the post-COVID-19 world, telemedicine should remain a large part of your digital front-door strategy. Use this time of widespread adoption to listen carefully to your patients, and build your future telemedicine strategy around their feedback. Look to NRC Health's upcoming playbook on patient experience for tips on how to use telemedicine.

"I appreciated the online visit. This is a format that could be used after the COVID-19 situation is over. If no physical exam is required, I would prefer this format. It saves time off work, and it limits my exposure to the illnesses of other patients in the waiting room." —Patient from Washington

"All of the staff are doing an amazing job, especially while dealing with COVID-19. I really like the new conference video doctor visits too!" —Patient from Colorado

"Because of this Covid 19, I was glad to stay home and be able to talk to my doctor. The video was a great way to save time and money for everyone. Thank you." —Patient in California

"Due to COVID-19 this visit was virtual, but went off seamlessly and was much easier than having to go down to see the doctor live for a simple check-in visit." —Patient from Georgia

CONCLUSION

COVID-19 has challenged you to be more courageous, more agile, and more human-centered than ever before. Analyzing the voice of the customer shows that patients largely perceive you to be rising to the challenge. Our text analytics suggest that even though patients are anxious, they continue to look to you as national leaders for information and education. Patients are reporting fantastic experiences overall, including record levels of virtual experiences—a new normal that will affect healthcare in the future as well. But whether via telemedicine or in-person care, focusing on the opinions, emotions, and desires of your patients will allow you to build relationships that last for lifetimes.

A note on our methodology

Patient comments were gathered from experience surveys delivered by NRC Health to patients between January and April 2020. Overall, NRC Health analyzed more than one million patient comments during this time. More than 22,000 of these comments were specifically related to COVID-19. NRC Health surveyed these comments using the same text analytics we make available to our partners. Comment analysis is performed by natural language processing, using our standard machine-learning sentiment and categorization models.

Data in this paper were also drawn from NRC Health's National Insights consumer study. The study was conducted in April 2020, with 2,000 consumer respondents participating.

About NRC Health

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.