

HEALTHCARE CONSUMERS 2020:

MOVING FORWARD WITH MINDFULNESS

*A national survey of over 1800 respondents,
fielded by Laughlin Constable, August 2020*

This past April we shared our first temperature check of consumer sentiment as COVID-19 took firm hold and stay-at-home orders rippled throughout the nation. We saw that safety measures in hospitals had skyrocketed in importance for hospital selection criteria, having previously been taken for granted. We also uncovered that Millennials were particularly concerned about being exposed to infection and were therefore more likely than other generations to avoid routine care. We highlighted the key role the news media is playing, particularly local news, to inform the public about the current state of affairs. And we reinforced the dramatic surge of Telemedicine adoption, especially among Boomers.

As the weeks of living in the climate of COVID have worn on, we are compelled to keep close to the mindset and motivations of consumers as it relates to their healthcare needs. Our April findings gave us a benchmark upon which to reflect, and with our most recent August wave we can certainly see shifts – some for the better, and some for concern. This report will pay particular attention to the emotional state of the consumer, and the implications this has on the messaging and actions of healthcare systems going forward.

EXECUTIVE SUMMARY AND IMPLICATIONS:

Expertise and Empathy are the way forward for health systems. Taking steps to help the most disillusioned group cope will not only serve them well but has broad reaching relevance for all consumers, wherever they are on the spectrum of confidence in navigating healthcare today. Enduring COVID concerns, coupled with continuing racial unrest, means that anxiety levels will continue to be an issue in the foreseeable future. Healthcare systems are well-poised to answer this anxiety with the right balance of confidence and compassion. Below are four ways forward:

1. UNLEASH LEADERSHIP MESSAGING

More consumers are ready to resume medical care and are therefore evaluating their options. While safety reassurance is still important, consumers are wanting to hear from healthcare systems about advancements, expertise and evolved options for a healthcare encounter.

2. PRIORITIZE PERSONALIZATION

The weight of COVID has put a blanket of strain over all of us, and there are varying degrees to which each of us is coping. Now more than ever in healthcare it's critical to connect personally with patients and meet them at their mindset. Expressing empathy in all of our communication and demonstrating an understanding of an individual's needs is imperative as we help consumers gain a continued comfort level.

3. ADDRESS THE MENTAL HEALTH PANDEMIC

While our healthcare institutions continue to fight the COVID-19 pandemic, there is a simultaneous need to bolster support for mental health issues. This is a problem that pre-dates COVID, but has only worsened as isolation, job loss, and relationship strain have surged. This more silent symptom of COVID-19 is one that may not be as visible but cannot be overlooked.

4. OPTIMIZE THE RANGE OF CARE OPTIONS

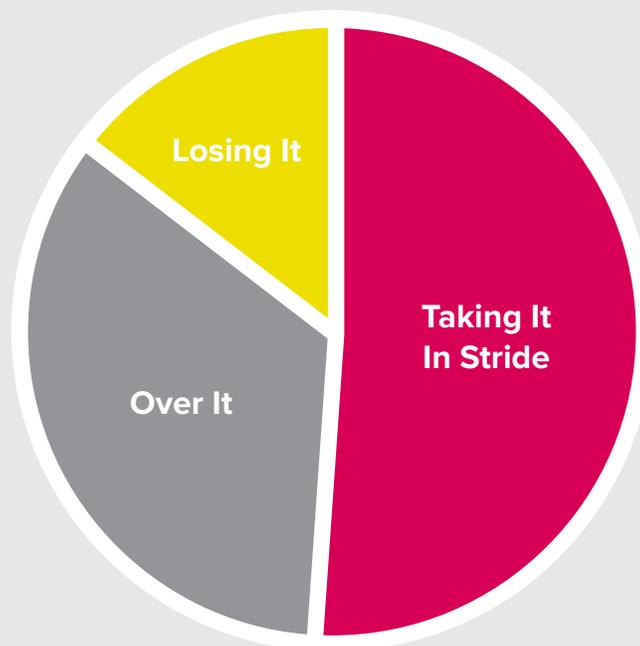
The degree to which any one person is comfortable engaging with healthcare in the current context exists along a spectrum, but these results show that more consumers are getting back to the business of their health. To facilitate confidence and comfort level it's important that healthcare systems offer a range of solutions that reduce friction along the journey. Optimizing capabilities like telemedicine, find a doctor, find a location and other online resources will be critical to keeping up.

KEY FINDINGS

A CAUTIOUSLY OPTIMISTIC TEMPERAMENT

As COVID has come closer to home, with more consumers indicating they have either personally been touched by it, or have a loved one in a vulnerable position, it's clear that sensitivities are still high. However, as evidence of the resiliency of the human spirit, the overall outlook nationwide is cautiously optimistic. When asked about their take on the current situation, over half of respondents expressed a “we'll get through it” attitude, tempered by the realization that it isn't going to dissolve overnight and their healthcare needs can't wait.

Another third was even more positive about the state of things and their motivation to resume healthcare. Not to be dismissed, however, are the 15% of the nation who are quite dismayed and admit to a need for support. Sensitivity to this “suffering” mindset is a key point we'll explore later in this report.



■ We're getting used to restrictions and we'll get through it. But things aren't getting better any time soon. As for health care, there are some things I can't put off much longer.

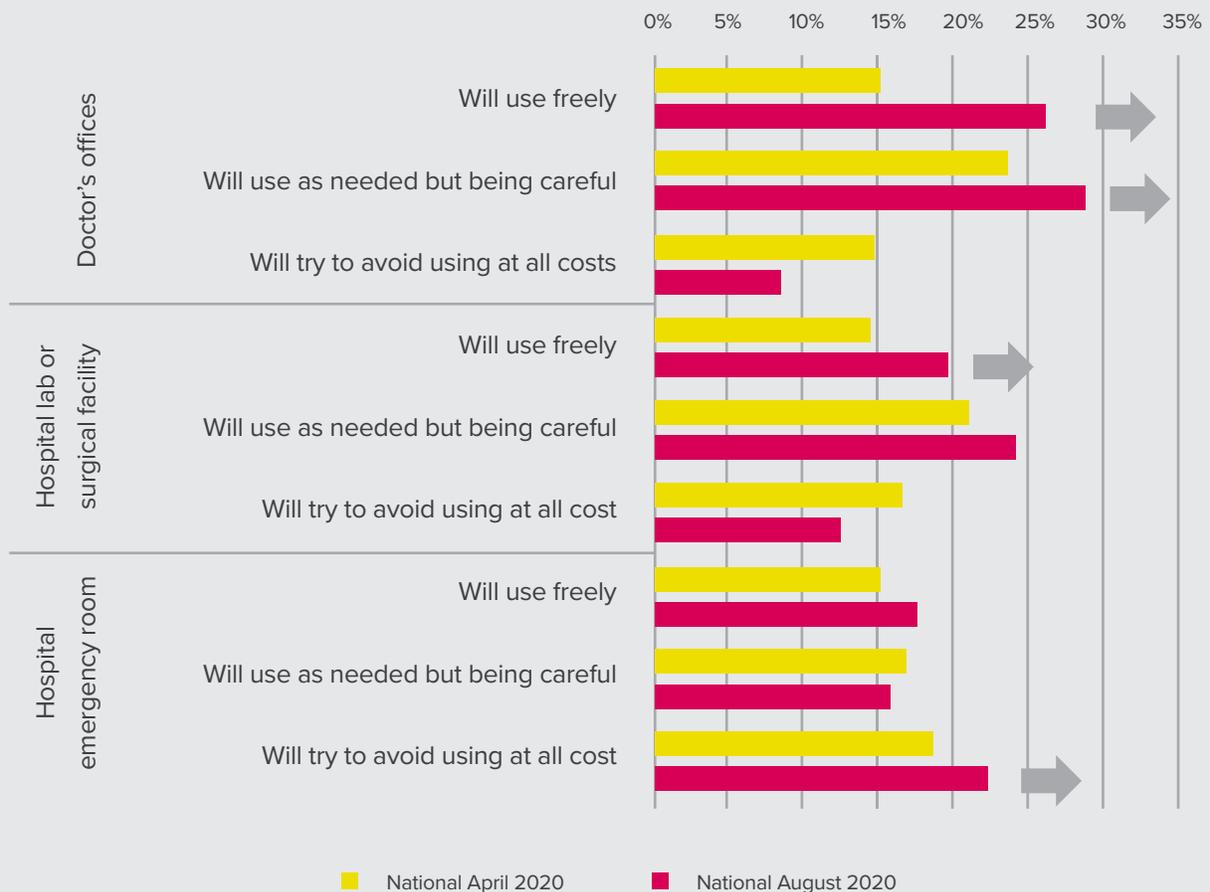
■ Things are getting better and “back to normal” is around the corner. I'm feeling more comfortable existing out of my “bubble.” As for health care, I have some catching up to do, but I'm ready.

■ The news isn't good, we seem to be going backwards. Our tolerance for social isolation is wearing thin. I don't know how much more I can take. As for health care, I may need some help just coping.

GETTING BACK OUT THERE

In line with the finding that the majority are cautiously optimistic and pragmatic about their healthcare needs, consumers indicate an increased openness to resume health-care, with the exception of visiting the Emergency Room. (A continued reticence to enter the ER isn't altogether surprising, given that this has always been "ground zero" for COVID-19 patients.) Encouragingly, though, the trend toward a heightened comfort level with visiting core healthcare facilities is very positive.

READINESS TO USE HEALTHCARE

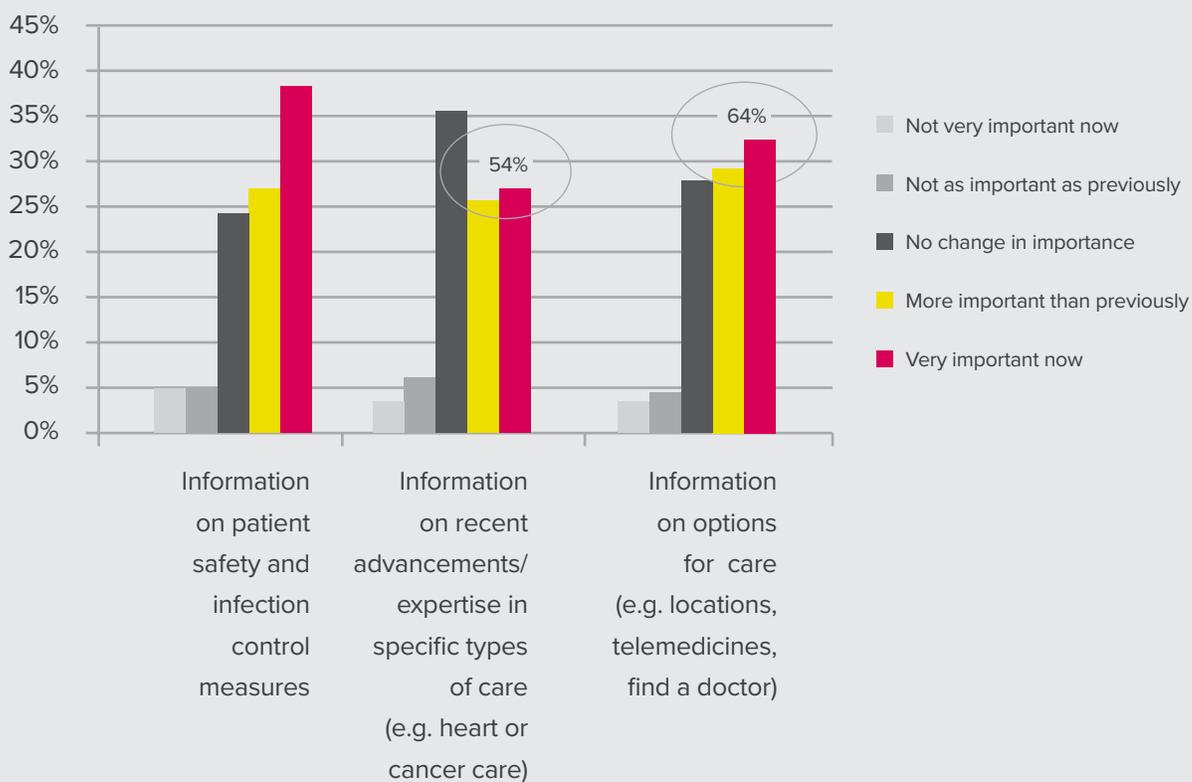


Significantly higher than National April 2020 at 95% or higher confidence level

ADVANCEMENTS AND OPTIONS ARE IMPORTANT

Greater openness to using healthcare going forward means that consumers will once again be making decisions about where to go for care. For this, we see that consumers are eager to hear from hospitals on messaging beyond just safety precautions. Although it's important to note that safety is still paramount, consumers value information on recent advancements and proof of expertise as much or more now than ever. And providing information on options that can facilitate getting timely quality care also shows high importance.

IMPORTANCE OF HOSPITAL INFORMATION



SEEKING EXPERTISE AND EMPATHY

As the population re-engages in healthcare needs, their prioritization of criteria shows some return to order with a few important nuances. This wave of our research indicates that priorities have shifted back to once again reflect a right brain, left brain balance (with safety as the greens-fees). Striking this delicate balance between head and heart is not a new challenge to healthcare, but trying to achieve it with a now more delicate patient psyche certainly is. The emotional strain that permeates the populace is likely fueling a re-ignited need to feel that healthcare providers are attuned to our specific needs.

RANKING OF HOSPITAL CRITERIA



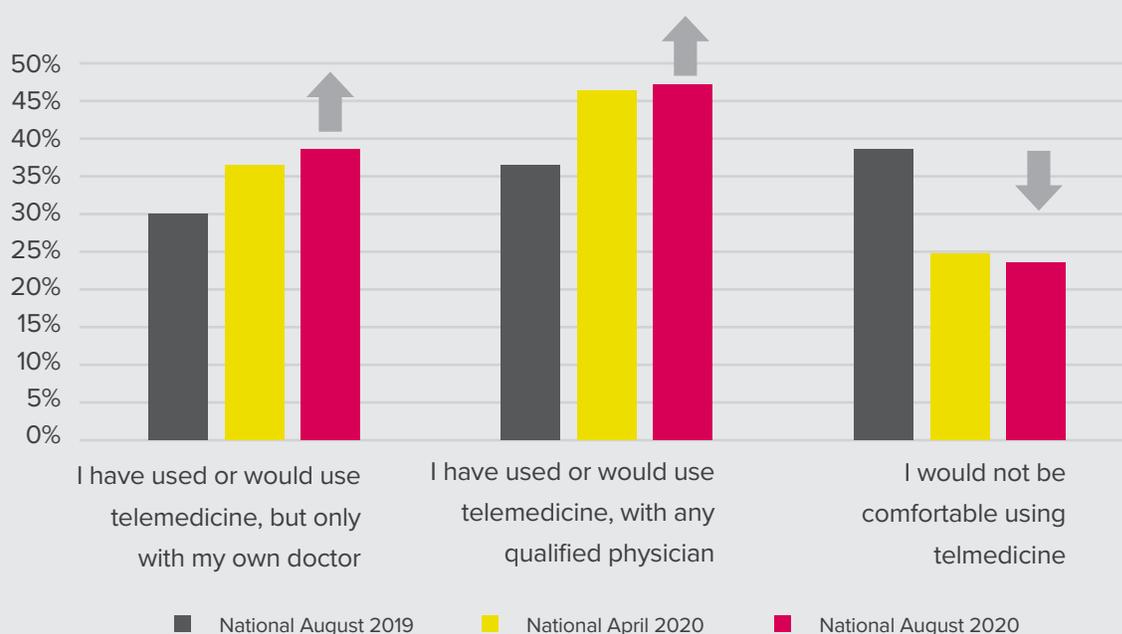
As evidence of this, we see Personalized Care reclaim its place among the top determinants. After a de-emphasis in importance in April, this criteria has had a resurgence to pre-COVID levels, now ranked on par with Latest Medical Technology. Treats the Toughest Conditions also saw a jump in importance, signaling the return to balance between expertise and empathy that patients are seeking today.

Also indicative of a return to the more balanced equation for decision-making is the slight slipping in importance of nurses and screenings, both of which were top-of-mind in April.

CRITICAL TOOLS FOR HEALTHCARE TODAY

Openness to Telemedicine (and all online platform options) continues to rise. The current situation thrust the population into a situation where Telemedicine went from a technological advancement to a medical must-have. Just as work-from-home and online schooling has made Zoom a household name, safety precautions have brought Telemedicine into the mainstream.

TELEMEDICINE ADOPTION



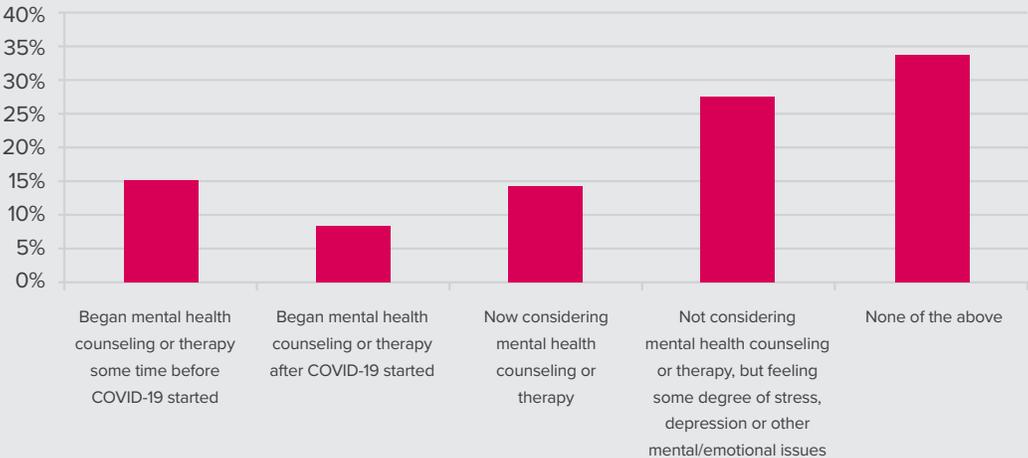
↑ Significantly different than National August 2019 at 99% confidence level

But if Telemedicine is to continue its upward trajectory toward mainstream practice, in a way that satisfies the mainstream needs, it needs to be evolved in the context of COVID to address the critical component of personalized care. The data shows that “Impersonalization” is a key barrier to Telemedicine for those that resist this important evolution in healthcare, reinforcing the need to amplify the Telemedicine experience with greater attention and engagement.

MENTAL WELL-BEING IS SUFFERING

Just beneath the surface of the more commonly reported statistics of COVID-19 is the impact it is having on communities' mental health. It's no surprise that the strain of living in this COVID climate is taking an emotional toll on us all. Over one-third of all consumers share that they have noticed new feelings of anger, depression or relationship issues since the beginning of the pandemic. The extent to which this has triggered one to seek mental health counseling is still relatively low overall, but as the pandemic continues we can only expect it to rise. The fact that only one-third of respondents are NOT experiencing some degree of mental stress is quite telling.

ADDRESSING MENTAL HEALTH



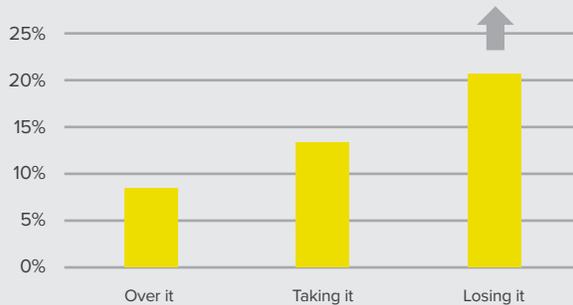
Digging a little deeper into how the current mindsets are affecting plans to seek health-care, the stakes of the stress of the situation are evident when we focus on the most disillusioned group (“Losing it”). Encouragingly, they tend to be more likely to seek mental health counseling, evidence that they aren’t necessarily resolute to handle this alone.

NOW CONSIDERING MENTAL HEALTH THERAPY

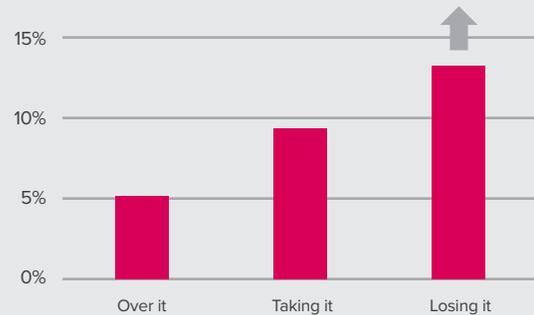


Yet they are also most likely to avoid seeking other medical care, which could lead to other issues down the road.

WILL TRY TO AVOID HOSPITAL LAB OR SURGICAL FACILITY AT ALL COSTS



WILL TRY TO AVOID DOCTORS' OFFICES AT ALL COSTS



↑ Significantly different than other 2 mindsets at 99% confidence level

While one may think the approval of a COVID-19 vaccine is the answer to getting this more disillusioned group to a greater comfort level, in fact this group of consumers is least certain they will get the vaccine once it is available and FDA approved. This speaks to the need for healthcare systems to take multiple steps to help this group cope.

OPENNESS TO COVID-19 VACCINE

