

Healthcare Consumers:  
A Changing Landscape



June 2020

C V R



# INTRODUCTION

The COVID-19 pandemic of 2020 has impacted virtually every aspect of life. Americans sheltered at home, relying on the CDC and the media to inform and advise. Serious questions arose, including concerns surrounding seeking treatment for healthcare issues. Non-life-threatening procedures were being pushed back, wellness exams were postponed, and hospitals were overwhelmed. Should citizens seek treatment for healthcare concerns? Was it safe?

In the spring of 2020 before Indiana's curve began to flatten, CVR and Carmichael & Company recognized consumer concerns could be signaling a slower-than-expected recovery for Indiana's healthcare industry. Because the long-term health of Hoosiers was at stake, we felt an answer was warranted and undertook an independent survey of 700 consumers. The results resonated with corporate leaders at Physicians Realty Trust, who had similar questions about consumers' willingness to return to pre-COVID-19 behaviors when it comes to their health.



Atlanta, GA



Dallas, TX



Minneapolis, MN



Louisville, KY

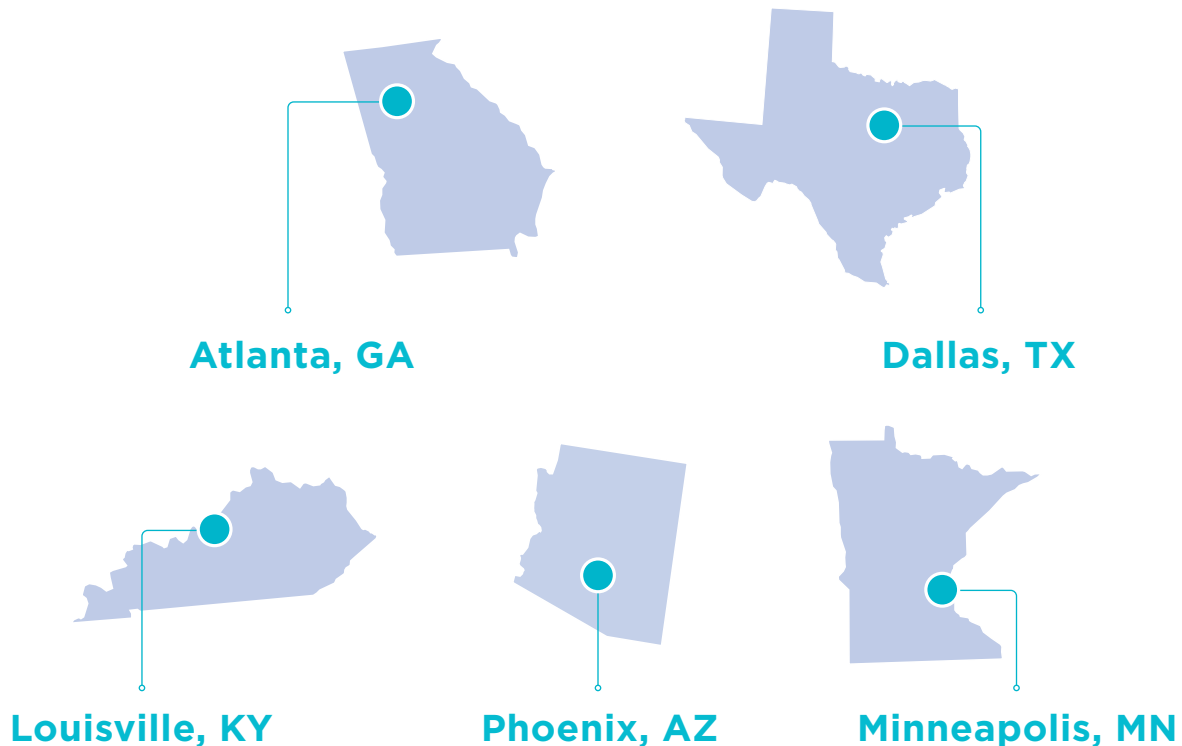


Phoenix, AZ

Physicians Realty Trust commissioned us to conduct an independent survey in five of their largest markets (Atlanta, Dallas, Louisville, Minneapolis and Phoenix). The goal of our research was to solicit feedback from a broad base of consumers to gain a sense of how they feel about the safety of their healthcare system facilities and their willingness to return to normal behaviors within the context of the COVID-19 situation. What follows is a high-level overview of key findings.

# RESEARCH METHODOLOGY

A panel-based survey was conducted in five markets.  
Our goal was 450 responses per market.



The margin of error for 2,018 responses  
consolidated across all five markets is 2.19%.

76.5%

Prefer location NOT connected to a hospital



OFF-CAMPUS MEDICAL OFFICE



HOSPITAL

23.5%

Don't mind location connected to a hospital

# HOSPITALS MAKE PEOPLE ANXIOUS

It is said that fear is a powerful motivator, and indeed our research revealed that the messaging people received during the early stages of the COVID-19 pandemic regarding hospitals was taken to heart. When given the choice of (1) going to a healthcare facility located in or connected to a hospital or (2) having their healthcare concerns attended to at a facility that is located one mile or more away from a hospital, the vast majority choose the latter. As there is no vaccine for COVID-19 at this time, nor expected in the near future, this uneasiness is likely to continue for the foreseeable future.

53.8%

Agree surgery take place in the hospital when recommended by physician



HOSPITAL



SURGERY CENTER

46.2%

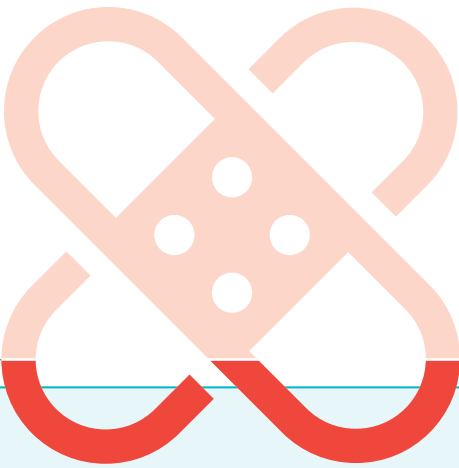
Would request surgery take place at a surgery center away from a hospital

# A SHIFTING PREFERENCE AWAY FROM HOSPITALS

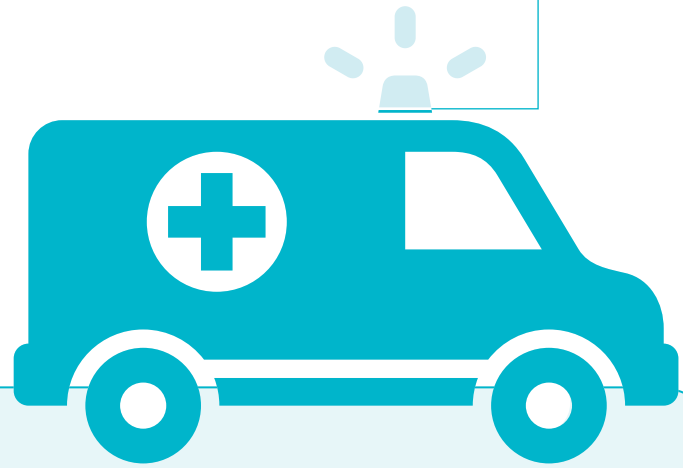
In another telling response to new attitudes toward hospitals, when asked if they had a non-emergency surgical need today, almost half the respondents said they would ask to schedule the procedure at a surgery center away from the hospital.

**22.6%**

Would not go to the ER if they had a medical emergency

**77.5%**

Would trust the hospital to keep them safe if they had an emergency



## PEOPLE ARE WILLING TO RISK THEIR LIVES

When asked if faced with a medical emergency, would an individual feel comfortable going to the ER, a startling 22.6 percent said they would prefer to handle the emergency themselves. Anxiety surrounding hospitals has caused nearly one-fourth of respondents to be more willing to risk their lives than go to the hospital.



# SEEING IS BELIEVING

We have become a society with a heightened awareness of cleanliness and hygiene. Hand sanitizer is now the superhero of the day. Clear, visible evidence of rigorous attention to hygiene, including seeing ongoing cleaning activity, masks, gloves, social distancing signs, etc. goes a long way toward making healthcare consumers feel more comfortable and less anxious about a visit to any healthcare facility.





# EXPECT NEW EXPECTATIONS

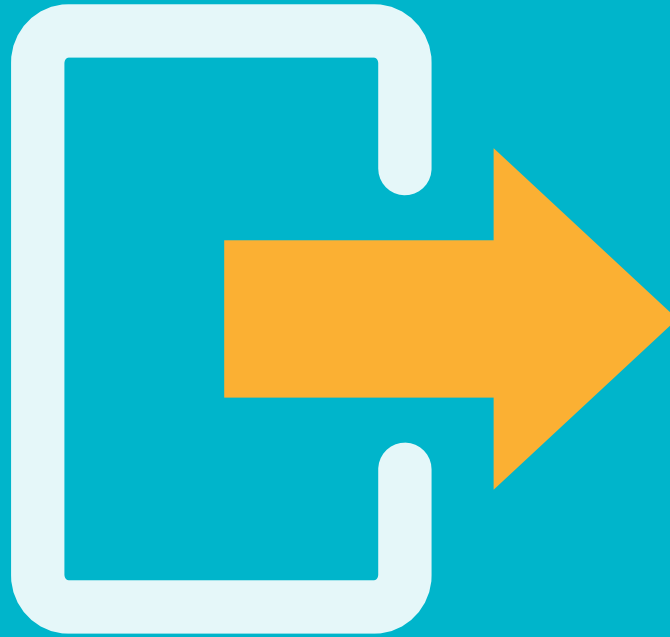
It is widely believed that there will be a new “normal” post-COVID-19. Consumer expectations of cleanliness, hygiene and safety could very well change as a result of the best practices that are being encouraged by the CDC now. Healthcare facilities should prepare to implement these practices for the long haul in order to alleviate consumer anxiety and remove barriers to consumers’ healthy lifestyles.





# MEDICAL PERSONNEL HAVE EARNED CONSUMER TRUST

While there is a phenomenon known as “white-coat syndrome” surrounding the increase of anxiety, sweaty palms and raised blood pressure that sometimes occur when people are nervous about a doctor visit, when it comes to who consumers trust as being highly credible, the white coats provide reassurance. Physicians, nurses and the CDC top the list of trusted spokespeople regarding COVID-19.



## NEXT STEPS

The research shows that consumers are anxious about where they receive healthcare treatment and even when or if it's safe to do so. They want to see that steps are being taken to safeguard their health as they navigate a pandemic. Consumers trust healthcare providers to be advocates who have patient well-being as their primary concern. They desire transparency and the knowledge that the healthcare industry is responsive to their needs.



# ABOUT

CVR is an Indianapolis-based, independent communications agency that Builds Brands That Matter. As an integrated advertising, public relations and digital agency, CVR uncovers the insights as to why customers should care about a brand. CVR solves business and communication problems with innovative solutions that can work in any channel. From video to websites, to social media and PR, CVR helps its clients' brands matter more.



**Contact:** **McKenze Rogers**, Director Business Development  
*mrogers@cvrindy.com*

**Jan Amonette**, Sr. Vice President  
*jamonette@cvrindy.com*



# ABOUT

Carmichael & Company is an Indianapolis-based health strategy firm focused on helping define and execute strategy for healthcare organizations. Carmichael & Company's capabilities are diverse. While healthcare is a focus, Carmichael & Company leverages its creative, yet disciplined, approach to strategic thinking, planning and execution for clients across a number of industries.



**Contact:** **Julie Carmichael**, Partner  
*julie@carmichaelandcompany.com*

**Jennifer Fry**, Partner  
*jennifer@carmichaelandcompany.com*