



FLEISHMAN
HILLARD

TRUE GLOBAL
INTELLIGENCE

COVID-19 MINDSET: THE SAFE RETURN TO HEALTHCARE SERVICES – U.S. ELECTIVE CARE STUDY

May 2020

“The disruption in healthcare delivery in the U.S. has been monumental and getting back to “normal” is going to take a lot more than opening up doctor’s offices and rescheduling surgeries.”

Tens of thousands of people hospitalized, at last count more than 80,000 dead in the United States alone. It’s easy to become numb to the large numbers. But the direct impact of COVID-19 is tragically just the tip of the iceberg when it comes to the impact this pandemic will have on our health.

The postponed doctors’ appointments, cancelled surgeries and delayed medications – not to mention the profound stress and emotional trauma – will have an enduring impact on the health of Americans for many years to come. The disruption in healthcare delivery in the U.S. has been monumental and getting back to “normal” is going to take a lot more than opening up doctor’s offices and rescheduling surgeries.

In this study, TRUE Global Intelligence, FleishmanHillard’s in-house research team, set out to understand how Americans assess their risk of returning to healthcare services – from primary care visits to eye exams to major surgeries – and what needs to be done to make them feel safe again in taking action to get the care they need.

The world has changed and it’s going to take a great deal of reassurance to convince us that the very places we used to view as places to get well are safe enough to set foot in again.

Anne de Schweinitz
Global Managing Director, Healthcare

A healthcare worker wearing a white lab coat, a black hair cap, clear safety goggles, and a white surgical mask. The worker is looking slightly to the right of the camera. The background is a blurred clinical setting. The entire image has a blue tint, and there is a solid orange vertical bar on the left side.

THE PURPOSE OF THIS REPORT IS TO PROVIDE INSIGHTS INTO CONSUMERS' PERCEIVED RISK OF RETURNING TO HEALTHCARE SERVICES AND WHAT IT WILL TAKE TO MAKE THEM FEEL SAFE.

Safe

adjective

*secure from liability to harm, injury, danger, or risk: a safe place.
free from hurt, injury, danger, or risk: to arrive safe and sound.
involving little or no risk of mishap, error, etc.: a safe estimate.*

METHODOLOGY

***TRUE Global Intelligence**, the in-house research practice of FleishmanHillard, fielded an online survey of U.S. adults aged 30-75 on May 4 – 5, 2020.*

Data have been weighted by gender and age.

	Sample Size	Percent of total
Total	n=600	
Age		
<i>30-45 years old</i>	n=247	41%
<i>46-60 years old</i>	n=178	30%
<i>61-75 years old</i>	n=175	29%
Gender		
<i>Male</i>	n=295	49%
<i>Female</i>	n= 305	51%

Americans have been trained to isolate, to follow stay at home orders and social distancing guidance – to keep a safe distance from people and places where risk of infection is higher. The powerful incentive to comply is fear of a highly contagious, acute illness that threatens our lives and steals our ability to breathe.

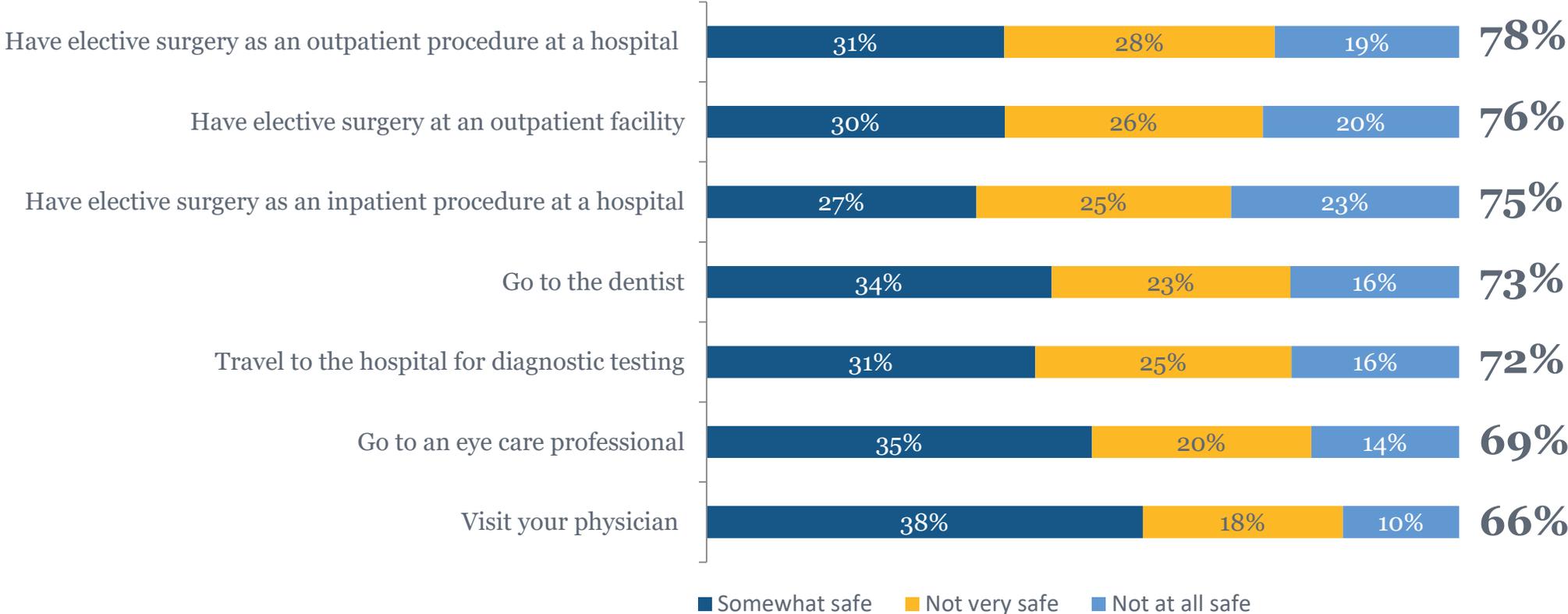
For months now we have been exposed to information telling us that the outside world and those places where we normally seek safety and care – hospitals and doctors' offices – are now filled with risk.

The COVID-19 pandemic has altered our perceptions of what's safe and what's not and may significantly impact how and if we access care in the months ahead.

Our age and gender factor in to this assessment of risk. Women feel far less safe than men when considering re-entering the healthcare system for elective procedures, as well as, routine visits to doctors, dentists and eye care professionals.

A MAJORITY OF CONSUMERS DO NOT FEEL SAFE GETTING ANY TYPE OF TREATMENT IN THE NEXT 3 TO 6 MONTHS

% Somewhat/Not Very/ Not at all safe



Q: How safe do you feel it is to do one of the following in the next 3-6 months?

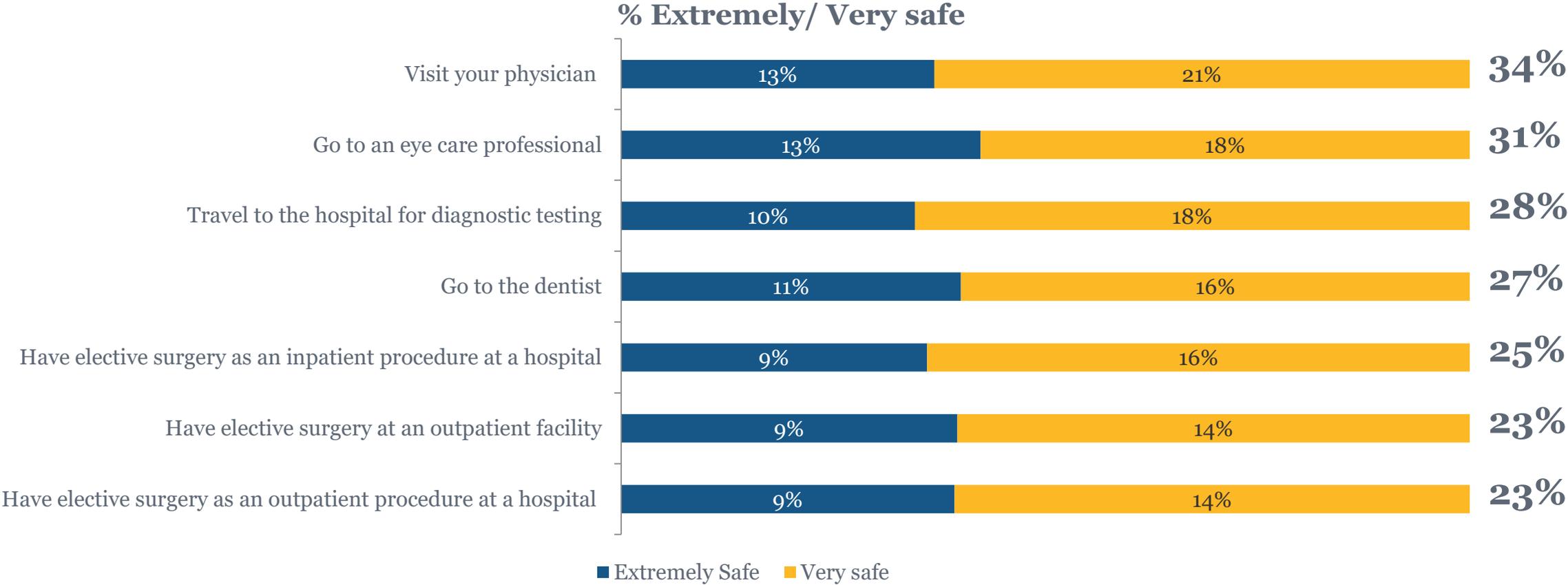
SPECIFICALLY, FEMALES AND THOSE AGED 60 AND OLDER FEEL LESS SAFE

% Somewhat/Not Very/ Not at all safe

	Female	Male	30 to 45	46 to 60	61 to 75
Have elective surgery as an outpatient procedure at a hospital	86%	68%	71%	78%	85%
Have elective surgery at an outpatient facility	86%	66%	68%	78%	86%
Have elective surgery as an inpatient procedure at a hospital	86%	64%	67%	79%	83%
Go to the dentist	81%	65%	67%	75%	81%
Travel to the hospital for diagnostic testing	83%	61%	68%	72%	79%
Go to an eye care professional	78%	60%	64%	69%	75%
Visit your physician	75%	57%	63%	67%	69%

Q: How safe do you feel it is to do one of the following in the next 3-6 months?

ONLY A THIRD OF U.S. CONSUMERS FEEL IT IS SAFE TO VISIT THEIR PHYSICIAN IN THE COMING MONTHS



Q: How safe do you feel it is to do one of the following in the next 3-6 months?

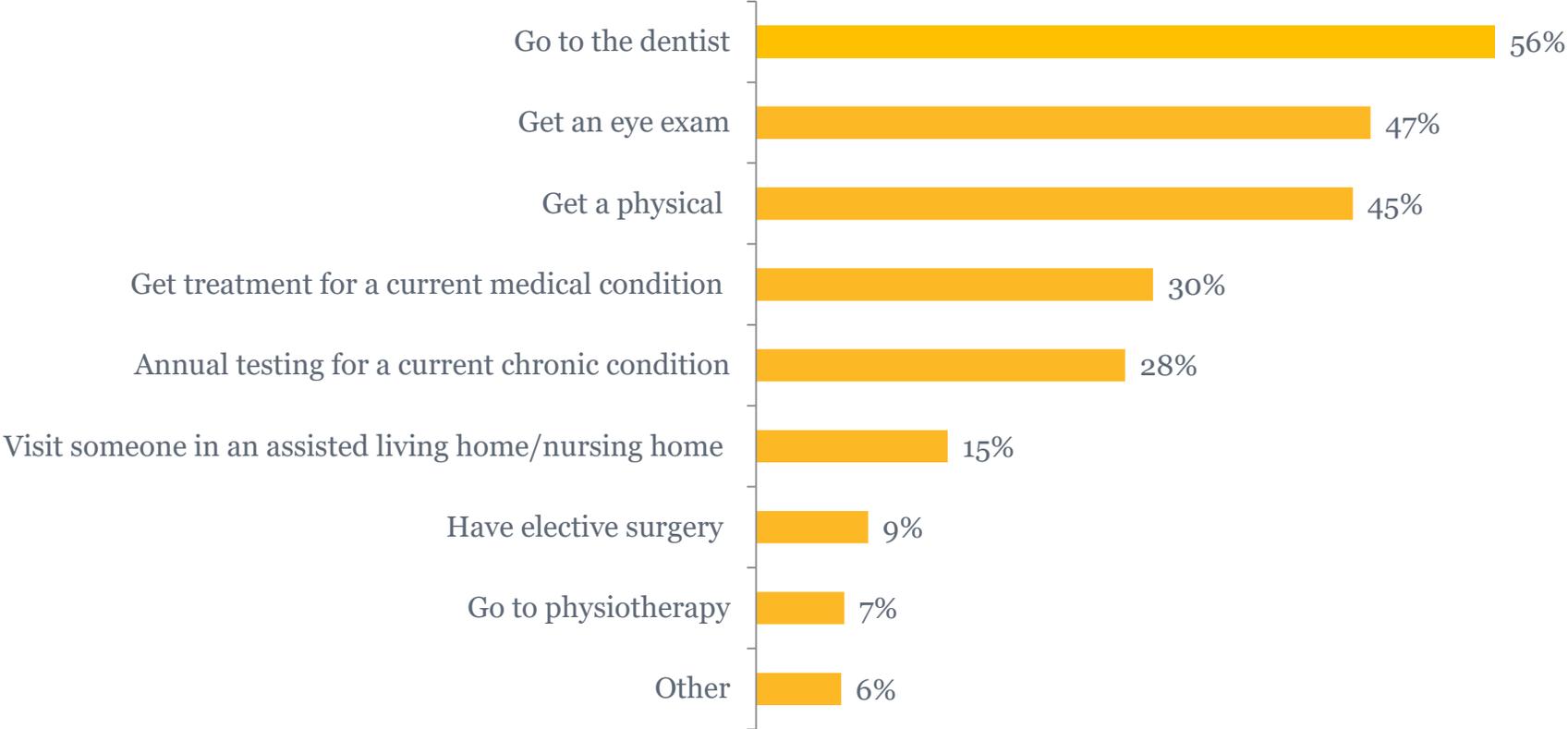
MALES ARE MORE LIKELY TO FEEL SAFE GOING TO THEIR PHYSICIAN OR AN EYE CARE PROFESSIONAL. CONSUMERS AGED 30 TO 45 ARE MORE LIKELY TO HAVE ELECTIVE SURGERY IN THE NEXT 3 TO 6 MONTHS

% Extremely/ Very safe

	Female	Male	30 to 45	46 to 60	61 to 75
Visit your physician	25%	43%	37%	33%	31%
Go to an eye care professional	22%	40%	36%	31%	25%
Travel to the hospital for diagnostic testing	17%	39%	32%	28%	21%
Go to the dentist	19%	35%	33%	25%	19%
Have elective surgery as an inpatient procedure at a hospital	14%	36%	33%	21%	17%
Have elective surgery at an outpatient facility	14%	34%	32%	22%	14%
Have elective surgery as an outpatient procedure at a hospital	14%	32%	29%	22%	15%

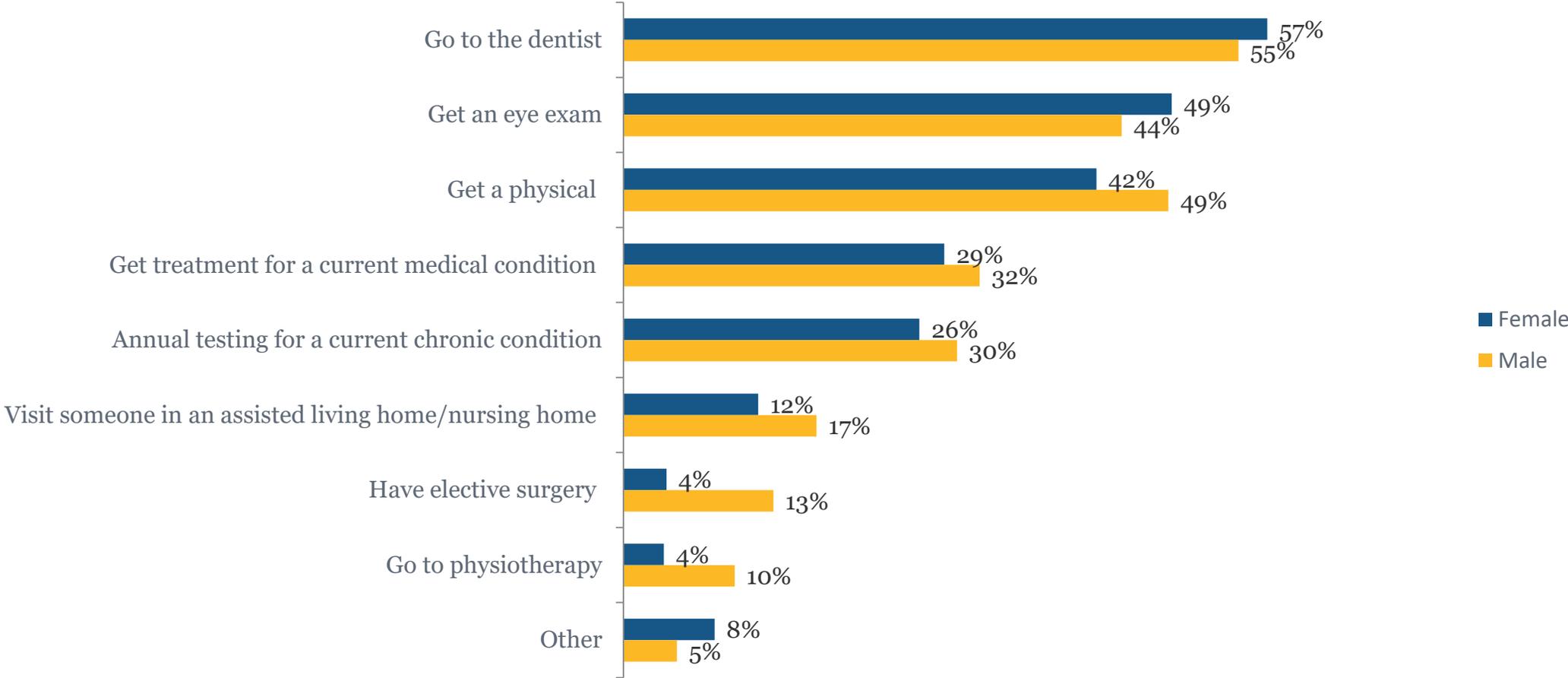
Q: How safe do you feel it is to do one of the following in the next 3-6 months?

MORE THAN HALF WILL VISIT THE DENTIST IN THE NEXT 12 MONTHS AND MORE THAN TWO IN FIVE WILL GET AN EYE EXAM OR PHYSICAL



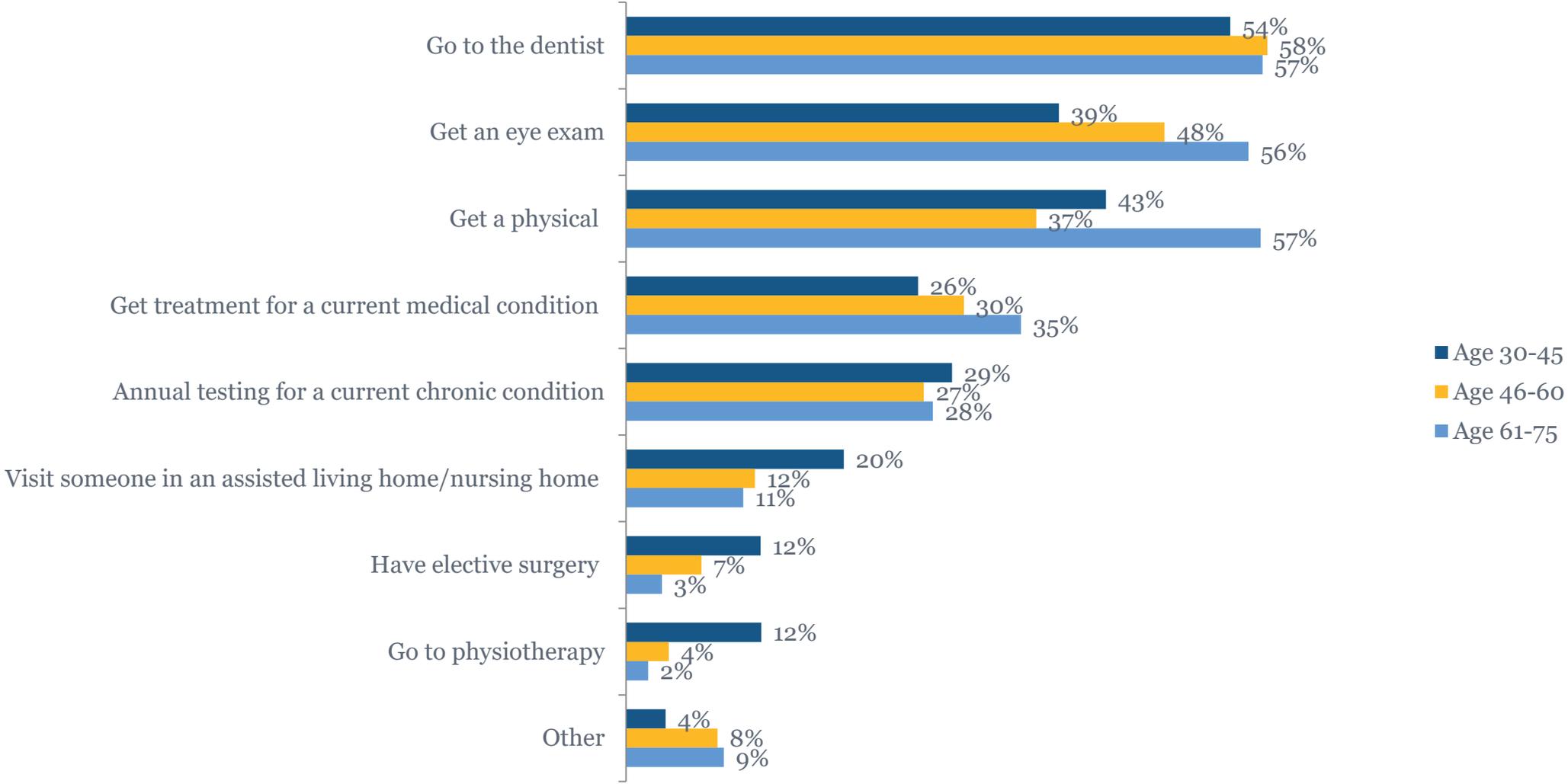
Q: Which of the following are you planning to do in the next 12 months?

FEMALES ARE SLIGHTLY MORE LIKELY TO GET AN EYE EXAM WHILE MALES ARE MORE LIKELY TO GET A PHYSICAL IN THE NEXT 12 MONTHS



Q: Which of the following are you planning to do in the next 12 months?

CONSUMERS 61-75 YEARS OLD ARE MUCH MORE LIKELY TO GET AN EYE EXAM OR PHYSICAL WITHIN THE YEAR



Q: Which of the following are you planning to do in the next 12 months?

The world has changed and it's going to take a great deal of reassurance to convince us that the very places we used to view as places to get well are safe enough to set foot in again.

How will we know when it is safe to get care? Who will we trust to tell us? What signs and signals will we be looking for to reassure us that necessary precautions for our safety have been put in place?

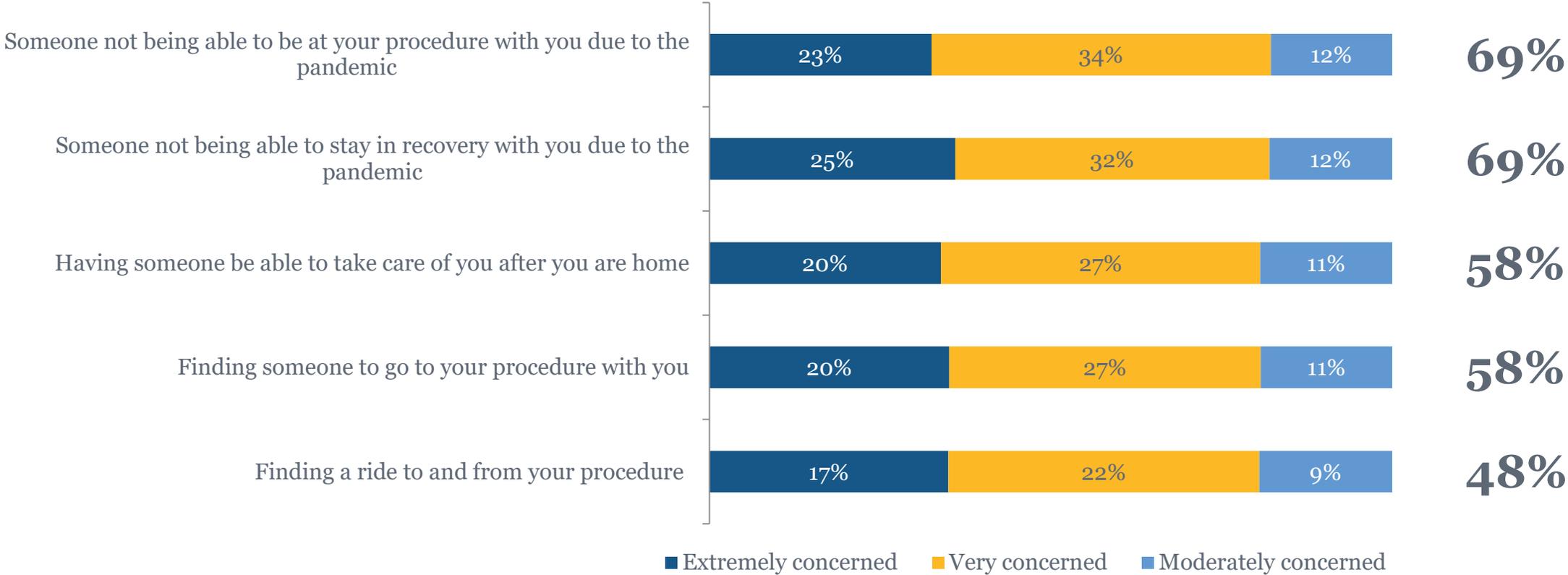
Consumers are seeking simple ways to be assured it is safe to return to healthcare settings. The language of safety can only be spoken by scientists and health experts – calls from HCPs that you can enter a hospital, or notices from local CDC officials or the World Health Organization.

Safety must also be communicated with tangible signs – separate entrances, sufficient PPE, social distancing markers, increased disinfection practices and confirmation the staff is being routinely tested for COVID-19.

Safety concerns are not exclusive to older populations. In fact, throughout the patient journey for elective procedures, younger Americans (30 to 45) are much more concerned about not having someone physically there for them throughout the entire process.

THE SAFETY CHAIN – MANY CONSUMERS ARE CONCERNED ABOUT NOT HAVING SOMEONE WITH THEM DURING A PROCEDURE OR IN RECOVERY WITH THEM

% Extremely/Very/Moderately concerned



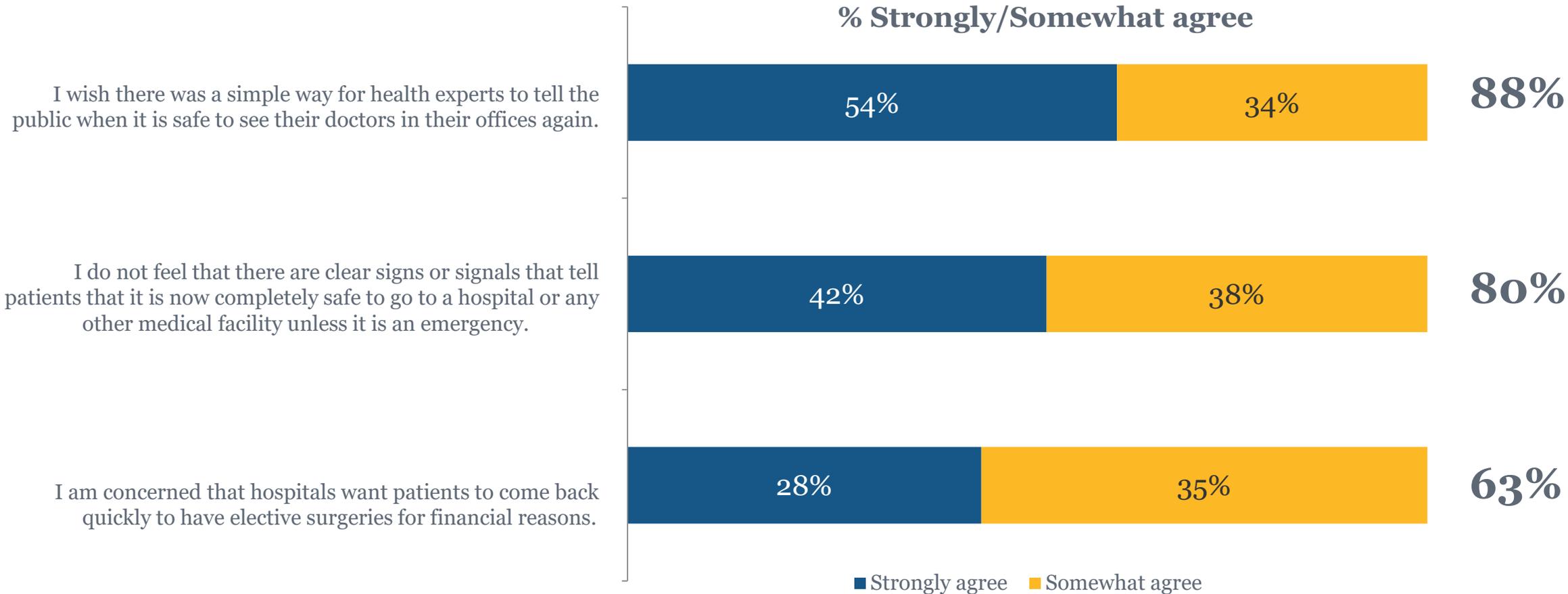
Q: If you had to go in for a procedure, how concerned are you with the following?

THE SAFETY CHAIN – SPECIFICALLY, YOUNGER CONSUMERS ARE MORE CONCERNED WITH NOT HAVING SOMEONE AT THE PROCEDURE OR IN RECOVERY WITH THEM

% Extremely/Very/Moderately concerned					
	Female	Male	30 to 45	46 to 60	61 to 75
Someone not being able to be at your procedure with you due to the pandemic	72%	67%	80%	64%	60%
Someone not being able to stay in recovery with you due to the pandemic	68%	70%	81%	63%	59%
Having someone be able to take care of you after you are home	55%	62%	71%	53%	48%
Finding someone to go to your procedure with you	58%	58%	72%	50%	47%
Finding a ride to and from your procedure	45%	53%	65%	39%	36%

Q: If you had to go in for a procedure, how concerned are you with the following?

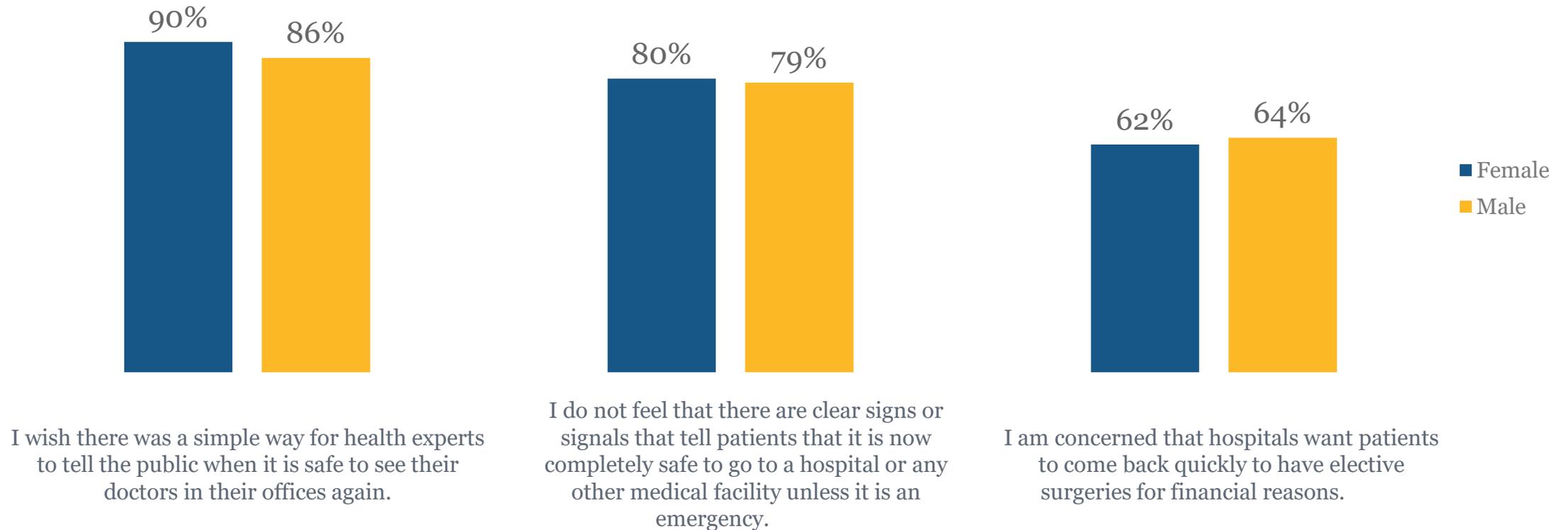
SIGNALS AND SIGNS – CONSUMERS WANT A SIMPLE WAY FOR HEALTH EXPERTS TO LET THEM KNOW WHEN IT IS SAFE TO SEE THEIR DOCTORS IN THE OFFICE AGAIN



Q: Please indicate if you agree or disagree with the following statements:

SIGNALS AND SIGNS – BOTH MEN AND WOMEN DO NOT FEEL THERE ARE CLEAR SIGNS THAT TELL PATIENTS IT IS SAFE TO GO TO A HOSPITAL UNLESS IT IS AN EMERGENCY

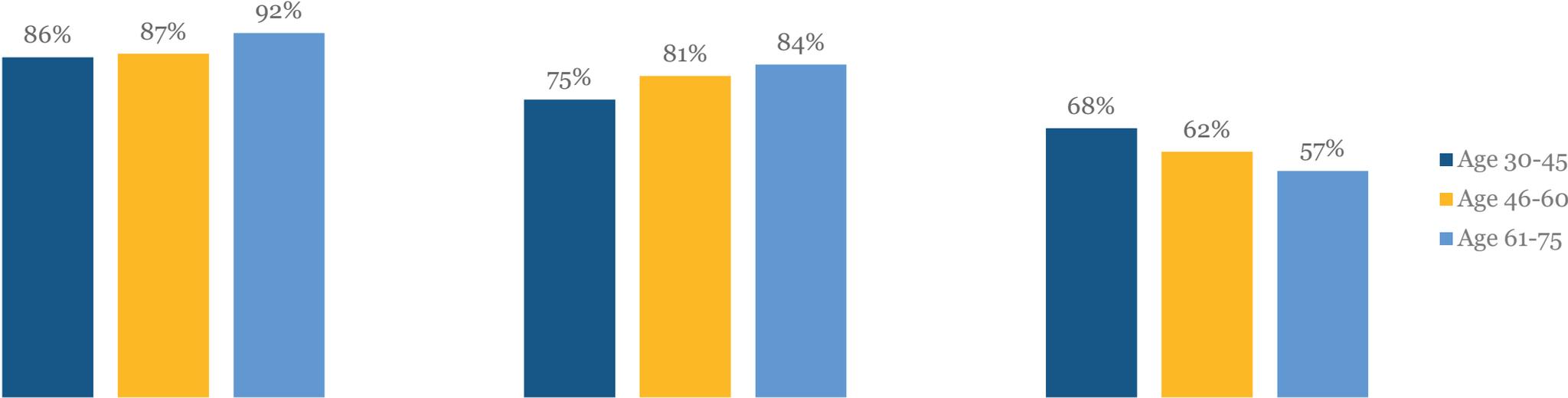
% Strongly/Somewhat agree



Q: Please indicate if you agree or disagree with the following statements:

SIGNALS AND SIGNS – YOUNGER CONSUMERS ARE MORE CONCERNED THAT HOSPITALS WILL PROMOTE ELECTIVE SURGERIES FOR FINANCIAL REASONS

% Strongly/Somewhat agree



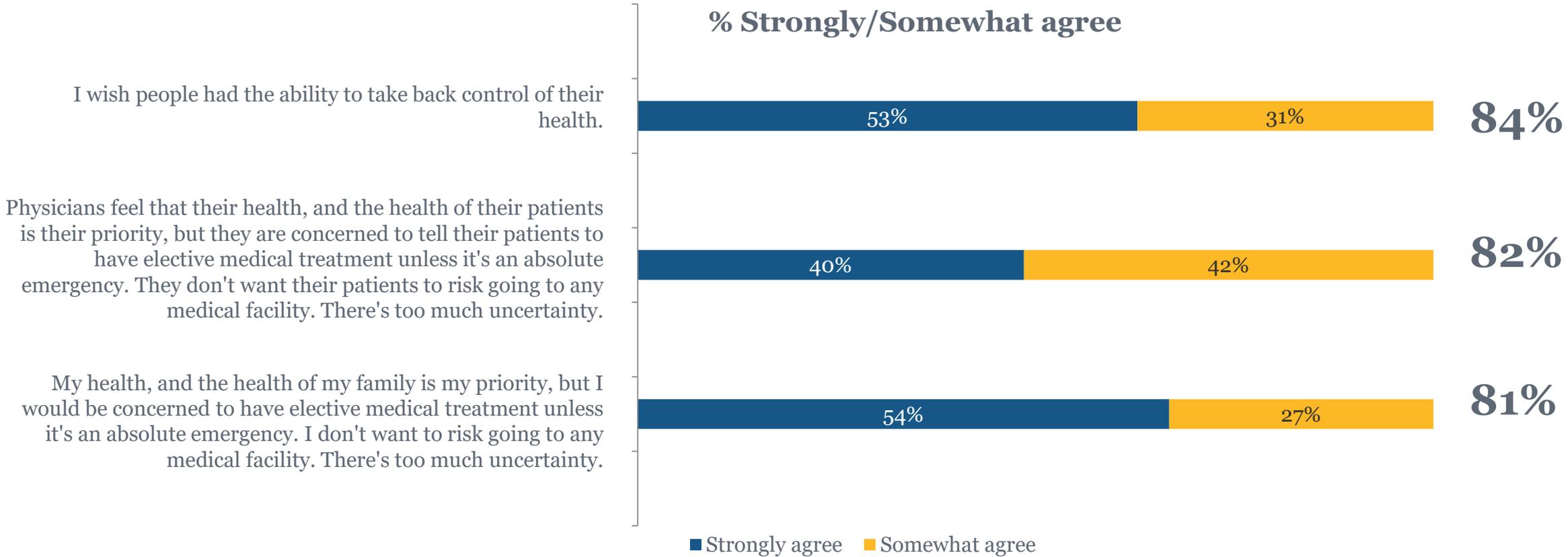
I wish there was a simple way for health experts to tell the public when it is safe to see their doctors in their offices again.

I do not feel that there are clear signs or signals that tell patients that it is now completely safe to go to a hospital or any other medical facility unless it is an emergency.

I am concerned that hospitals want patients to come back quickly to have elective surgeries for financial reasons.

Q: Please indicate if you agree or disagree with the following statements:

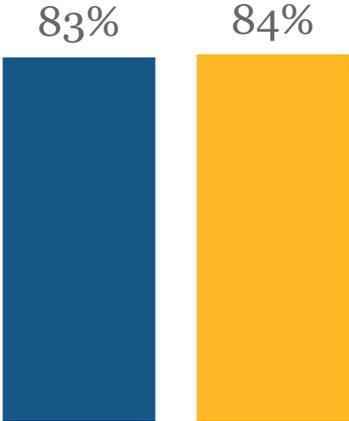
CONTROL VS RISK – CONSUMERS WANT TO TAKE BACK CONTROL OF THEIR HEALTH BUT THERE IS TOO MUCH UNCERTAINTY AND RISK



Q: Please indicate if you agree or disagree with the following statements:

CONTROL VS RISK – FEMALES ARE SLIGHTLY MORE CONCERNED ABOUT HAVING ELECTIVE SURGERY RIGHT NOW UNLESS IT IS AN EMERGENCY

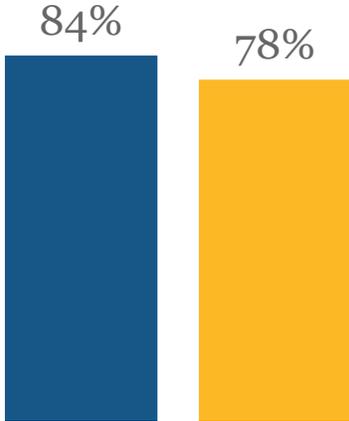
% Strongly/Somewhat agree



I wish people had the ability to take back control of their health.



Physicians feel that their health, and the health of their patients is their priority, but they are concerned to tell their patients to have elective medical treatment unless it's an absolute emergency. They don't want their patients to risk going to any medical facility. There's too much uncertainty.



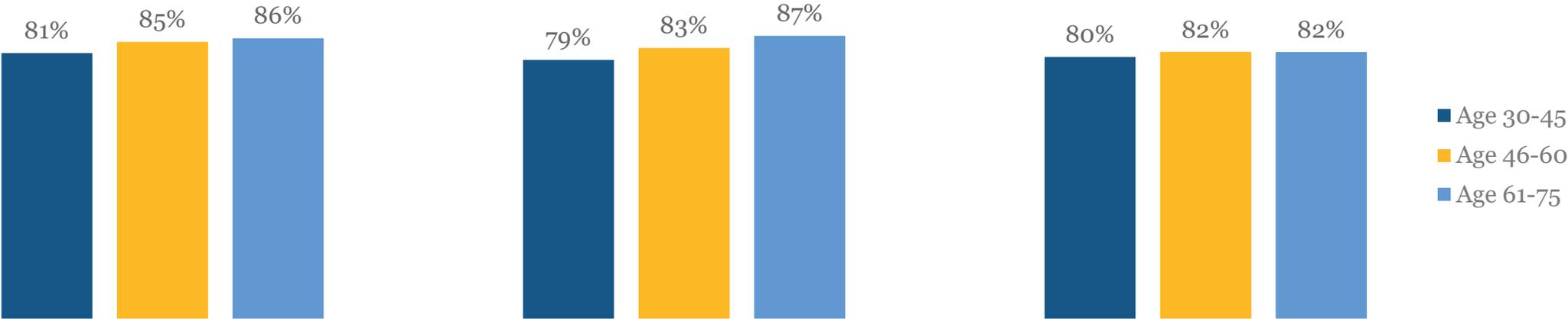
My health, and the health of my family is my priority, but I would be concerned to have elective medical treatment unless it's an absolute emergency. I don't want to risk going to any medical facility. There's too much uncertainty.

■ Female
■ Male

Q: Please indicate if you agree or disagree with the following statements:

CONTROL VS RISK – CONSUMERS OF ALL AGES FIND THERE TO BE TOO MUCH UNCERTAINTY WITH GETTING ELECTIVE MEDICAL TREATMENT RIGHT NOW

% Strongly/Somewhat agree



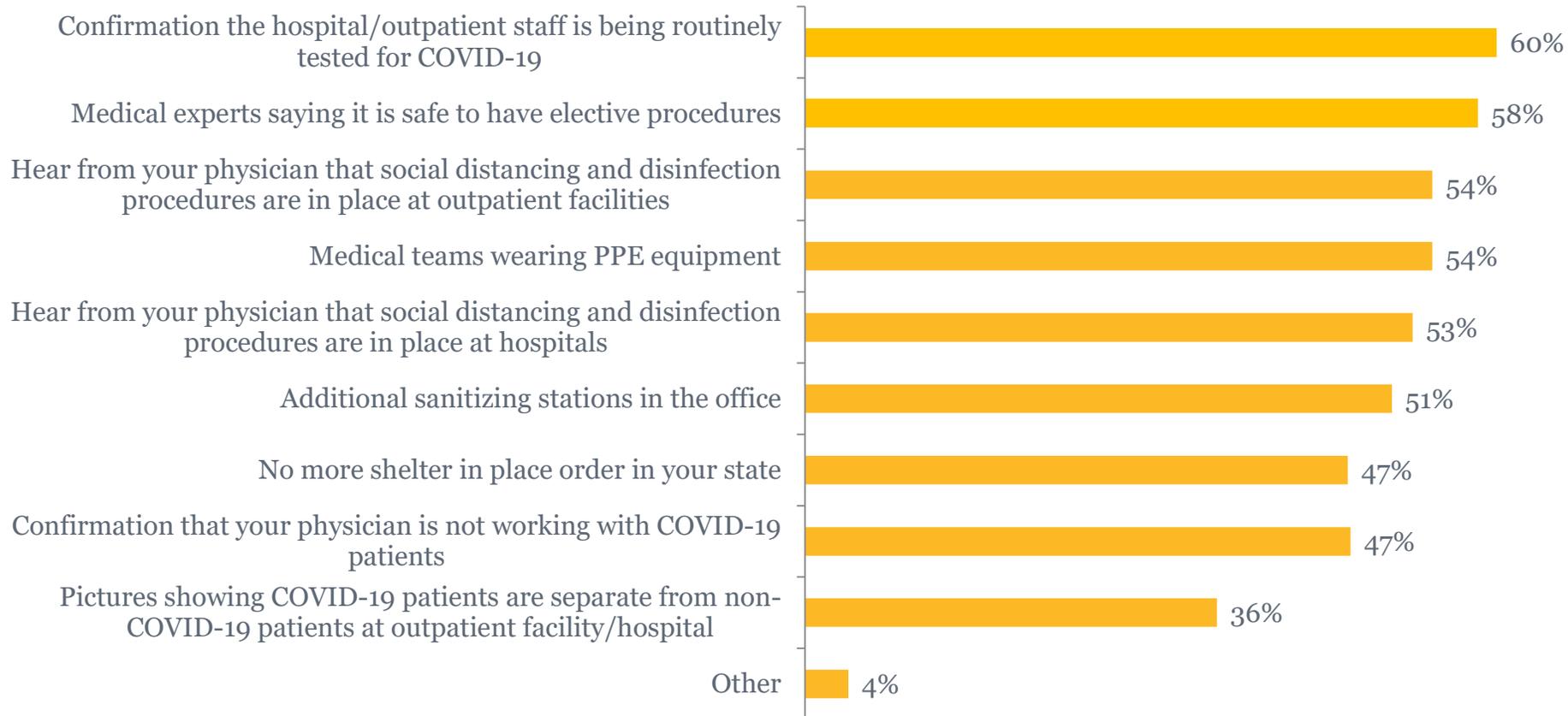
I wish people had the ability to take back control of their health.

Physicians feel that their health, and the health of their patients is their priority, but they are concerned to tell their patients to have elective medical treatment unless it's an absolute emergency. They don't want their patients to risk going to any medical facility. There's too much uncertainty.

My health, and the health of my family is my priority, but I would be concerned to have elective medical treatment unless it's an absolute emergency. I don't want to risk going to any medical facility. There's too much uncertainty.

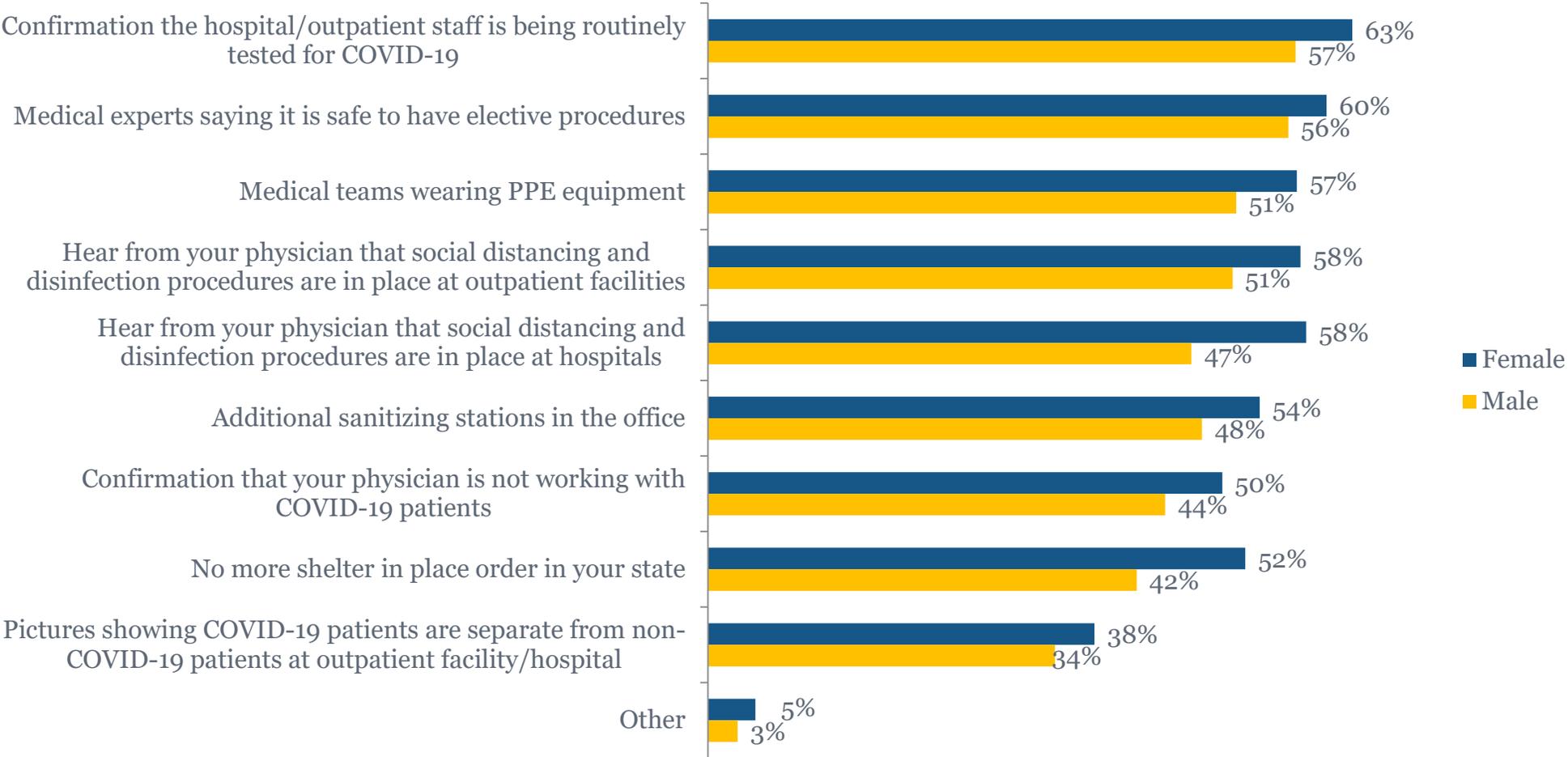
Q: Please indicate if you agree or disagree with the following statements:

SIGNS OF SAFETY – CONFIRMATION THAT STAFF IS BEING TESTED FOR COVID-19 AND MEDICAL EXPERTS SAYING IT'S SAFE TO HAVE ELECTIVE PROCEDURES IS WHAT CONSUMERS NEED TO HEAR TO FEEL SAFE



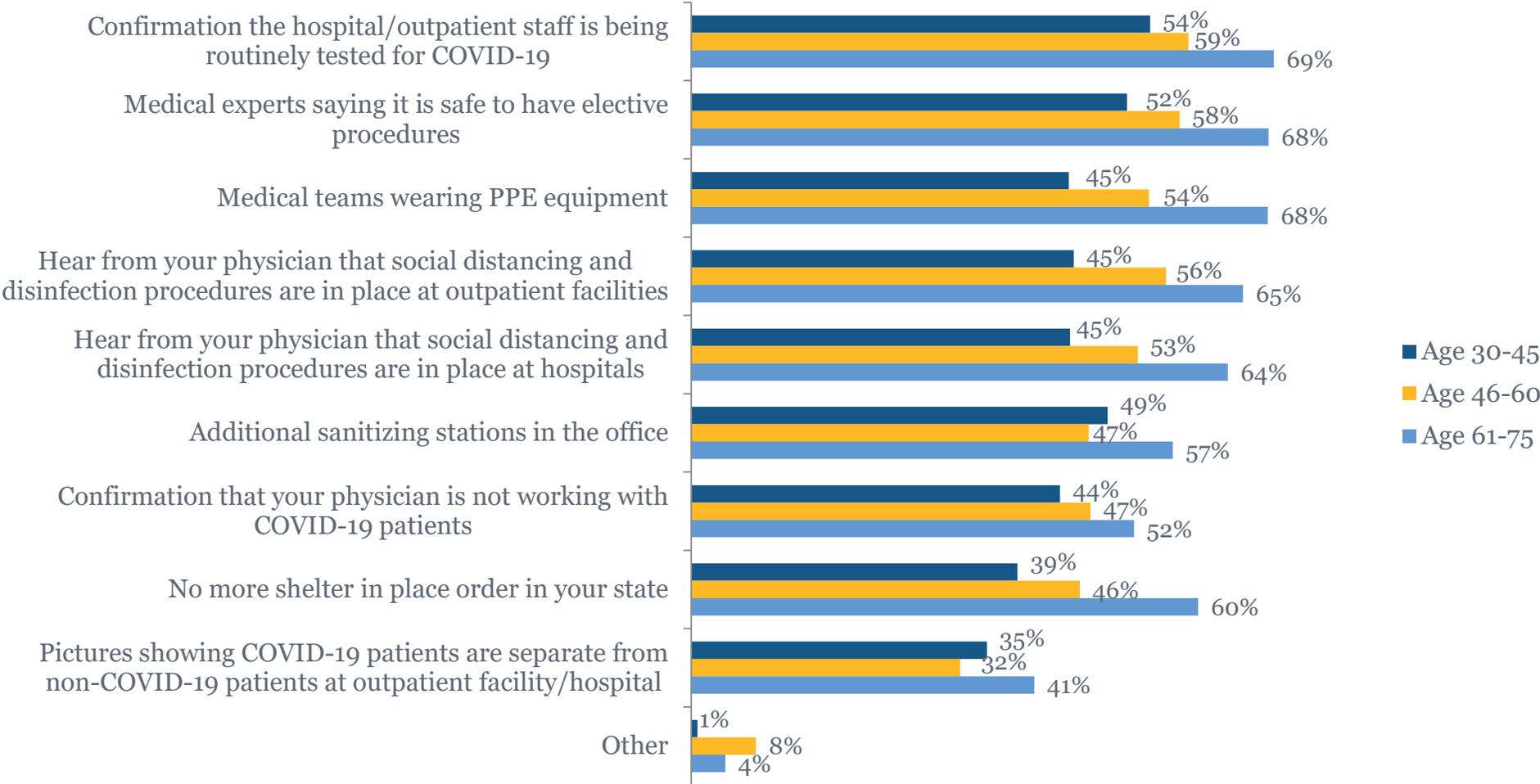
Q: What do you need to see or hear in order to feel safe to have an elective procedure in the next 3-6 months?

SIGNS OF SAFETY – FEMALES, MORE THAN MALES, ARE LOOKING FOR SIGNS OF SAFETY TO FEEL SAFE HAVING AN ELECTIVE PROCEDURE



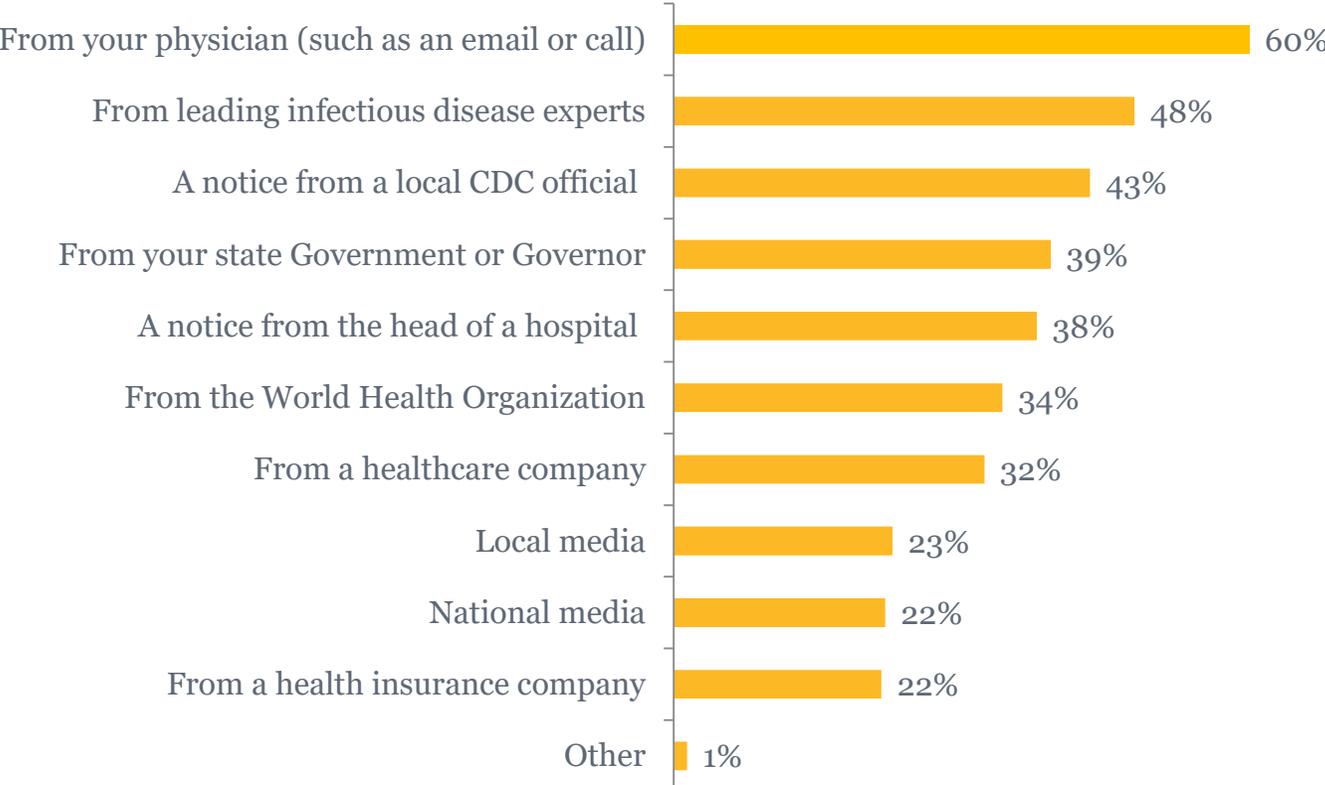
Q: What do you need to see or hear in order to feel safe to have an elective procedure in the next 3-6 months?

SIGNS OF SAFETY – CONFIRMATION THAT STAFF IS BEING ROUTINELY TESTED FOR COVID-19 IS MOST IMPORTANT FOR CONSUMERS 61 TO 75 YEARS OF AGE



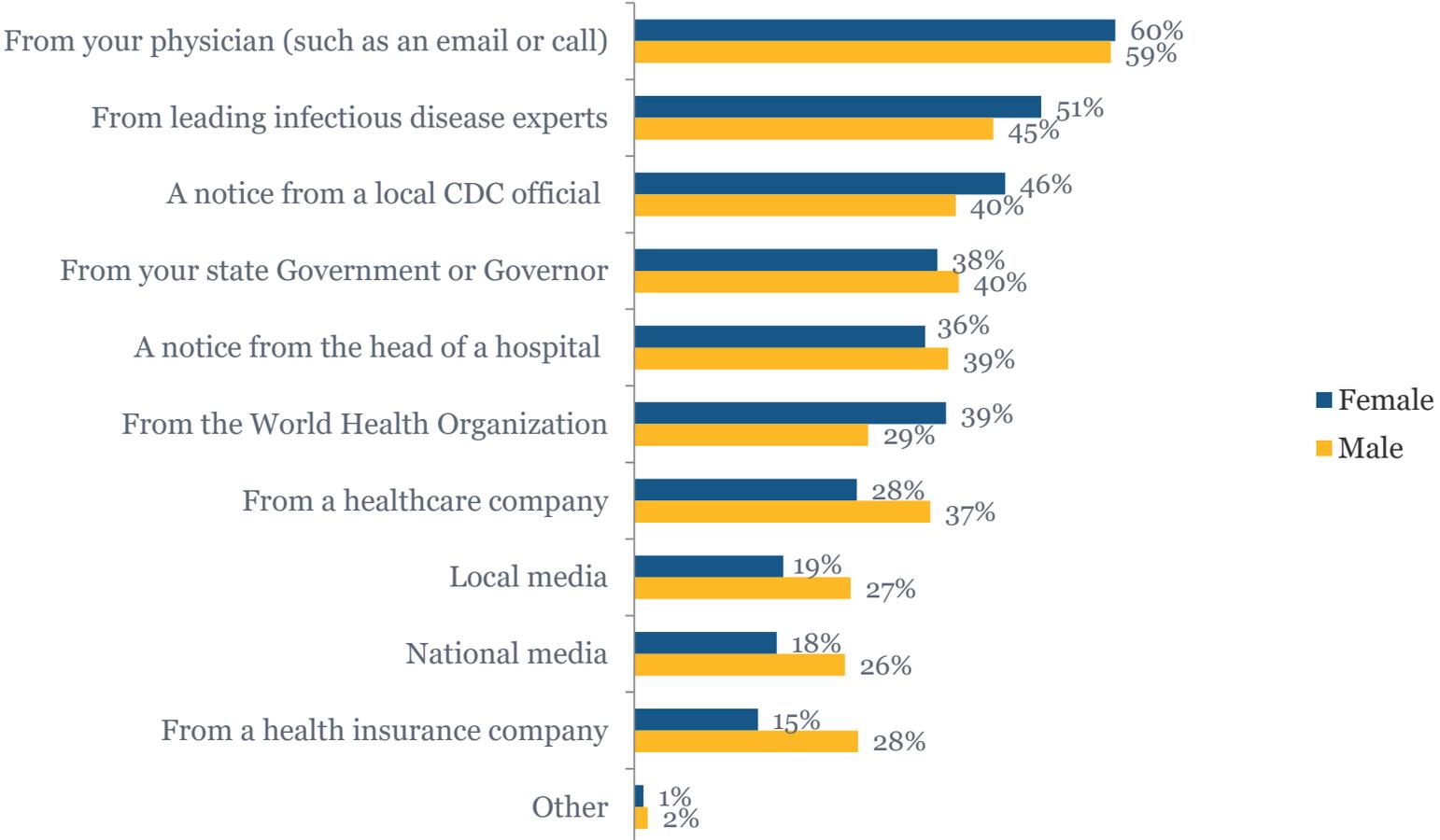
Q: What do you need to see or hear in order to feel safe to have an elective procedure in the next 3-6 months?

ONLY SCIENCE CAN SPEAK SAFETY – CONSUMERS WANT TO HEAR DIRECTLY FROM THEIR PHYSICIAN WHAT SAFETY MEASURES WILL BE TAKEN IN PREPARATION FOR ELECTIVE PROCEDURES



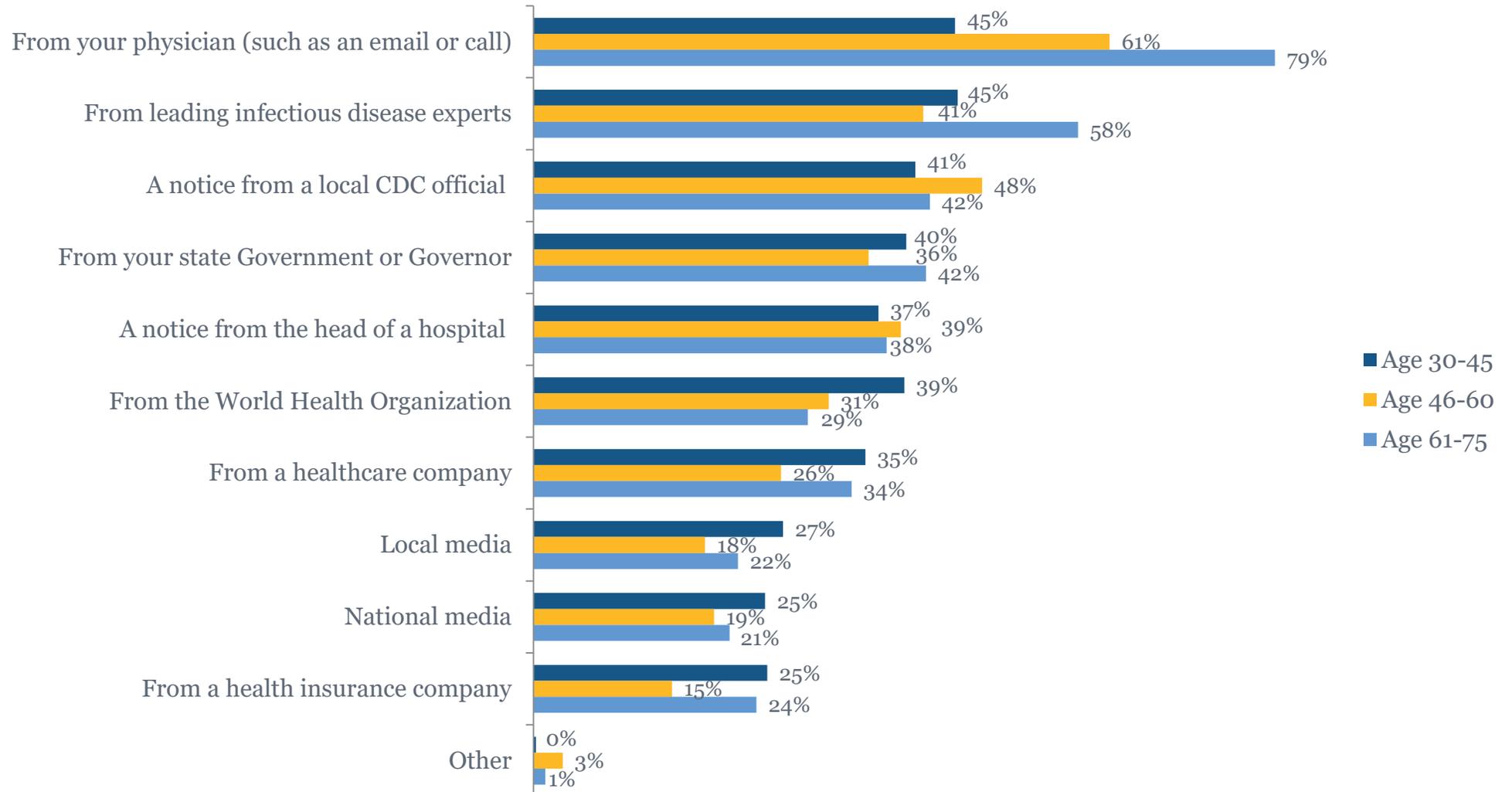
Q: Who do you want to hear from regarding safety measures being taken in preparation for elective procedures or surgeries?

ONLY SCIENCE CAN SPEAK SAFETY – FEMALES WANT TO HEAR FROM DISEASE EXPERTS AND CDC OFFICIALS MORE, WHILE MALES ARE LOOKING TO THE MEDIA AND HEALTH INSURANCE COMPANIES



Q: Who do you want to hear from regarding safety measures being taken in preparation for elective procedures or surgeries?

ONLY SCIENCE CAN SPEAK SAFETY – A MAJORITY OF CONSUMERS 61-75 WANT TO HEAR FROM THEIR PHYSICIAN WHILE HALF OF THOSE AGED 46 TO 60 WANT A NOTICE FROM A LOCAL CDC OFFICIAL



Q: Who do you want to hear from regarding safety measures being taken in preparation for elective procedures or surgeries?

WHAT CAN YOU DO

Guideposts for Healthcare Communicators

ACKNOWLEDGE THE FEAR, BE PATIENT, COMMUNICATE TANGIBLE STEPS

Acknowledge that the fear is real – and it’s been a key driver in keeping people safe during the outbreak

Recognize that each individual has experienced and is processing the past few months in different ways – our assessment of risk varies

Demonstrate patience and empathy as consumers seek to regain their own sense of control

Let science and trust experts lead the conversation about “return”

Clearly communicate the tangible steps being taken to reduce risk and ensure a safe environment

Make sure you don’t sound self-serving as you encourage people to take care of themselves

LET SCIENCE SIGNAL SAFETY

Consumers want to hear directly from medical professionals and trusted public health officials that it is safe to return to healthcare settings.

Consumers are seeking simple ways to be assured that it is safe to return to healthcare settings. They need credible signals and tangible signs.



FLEISHMAN
HILLARD

TRUE GLOBAL
INTELLIGENCE

INFORMATION

FOR QUESTIONS RELATED TO THE COVID-19 MINDSET STUDY, CONTACT:

Catherine Reynolds

Global Healthcare Insights

Catherine.Reynolds@trueglobalintelligence.com

FOR SUPPORT NAVIGATING COVID-19, CONTACT:

Anne de Schweinitz

Global Managing Director, Healthcare

Anne.deSchweinitz@fleishman.com