![Advisory Board logo]

How Covid-19 Has Changed Consumer Communication, Safety, and Site of Care Preferences

Findings from Our June 2020 Survey

Presented by
Market Innovation Center

Roadmap

Survey overview

Overview

Between May 26 and June 8, 2020, we surveyed more than 7,000 adult consumers (aged 18 to 93) on how Covid-19 has changed their health care behaviors and preferences. The survey included 29 questions and assessed topics including:

- Consumer anxiety levels and personal impact of Covid-19

- Factors influencing comfort seeking health care services

- Communication and site of care preferences

- Virtual visit preferences for different types of services

What's clear: Covid-19 has changed the way consumers want to engage with the health care system and what they expect from their providers.

SURVEY REPORTS

We are publishing the results of this survey in two sections:

- **Consumer Communication, Safety, and Site of Care Preferences** (this report)

- **Virtual Visit Utilization and Preferences**

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Summary of key findings

1. **Younger consumers were most likely to have experienced changes in employment status and health insurance coverage amid Covid-19.** While 36% of all consumers surveyed were furloughed, had their hours reduced, or became unemployed during the pandemic, a greater share of Gen Zers and Millennials experienced these changes (58% and 44%, respectively). These same groups also reported losing insurance at higher rates, which may explain their increased interest in becoming more involved in their own health—another preference that generally decreased with age.

2. **To feel comfortable returning to a clinic for care, consumers overwhelmingly want access to an effective vaccine or treatment for Covid-19. However, there are several no-regrets investments clinics can make to reassure consumers in the meantime.** Consumers want to know that exam rooms are sanitized after each patient, that all patients are tested for Covid-19 when they arrive for an appointment, and that all staff are tested daily, wear masks at all times, and do not treat patients with Covid-19. They care least about visitor policies and Covid-19 infection, hospitalization, and death rates in their state. Also of note, consumers tend to rate the same attributes in their top-10 most-important list, but differ in how much value they place on each individual attribute. See page 10 for details.

3. **Consumers want information about testing, alternative care options, and online symptom checkers from their providers—ideally by email.** Every generational segment ranked at least two of these resources in their top-three list of what would be most helpful to receive from a provider. No one ranked information about mental health services, clinical trials, or Covid-19 treatments in their top-three list. Consumers of all ages would prefer to receive this type of information—and any Covid-19-related information—by email. The second-best communication channel is text for younger consumers and the patient portal for older consumers.

4. **Physician offices are perceived as the most attractive setting to receive Covid-19 tests or complete routine bloodwork, though at-home and drive-through care are becoming increasingly popular.** Roughly a third of consumers would most want to go to a physician office for Covid-19 testing—a preference that becomes more pronounced with age. Drive-through testing centers and at-home, self-administered tests run a close second and third, respectively. Most consumers do not want to go to a hospital or urgent care center for these tests, though younger consumers are more comfortable with these settings than older individuals. For routine bloodwork, half of all consumers would rather go to a doctor's office than complete bloodwork at home, a commercial lab, or a drive-through testing center.

Roadmap

![Advisory Board]

1 in 3 experienced a change in employment status

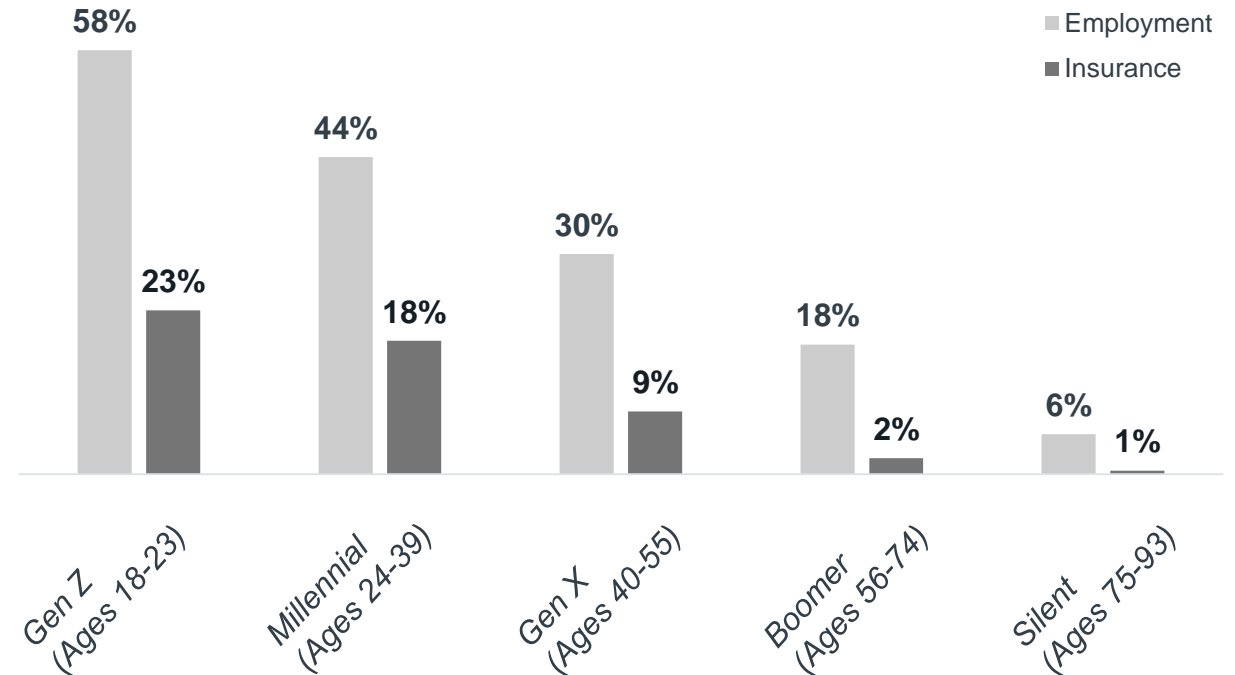## Youngest consumers hardest hit by loss of insurance and stable employment

DATA SPOTLIGHT

36% Of consumers experienced a change in employment status

11% Of consumers lost insurance coverage

15% Of consumers with a chronic condition lost insurance coverage

Consumers who lost insurance or experienced a change in employment status[1] due to Covid-19

n=7,452

■ Employment
■ Insurance

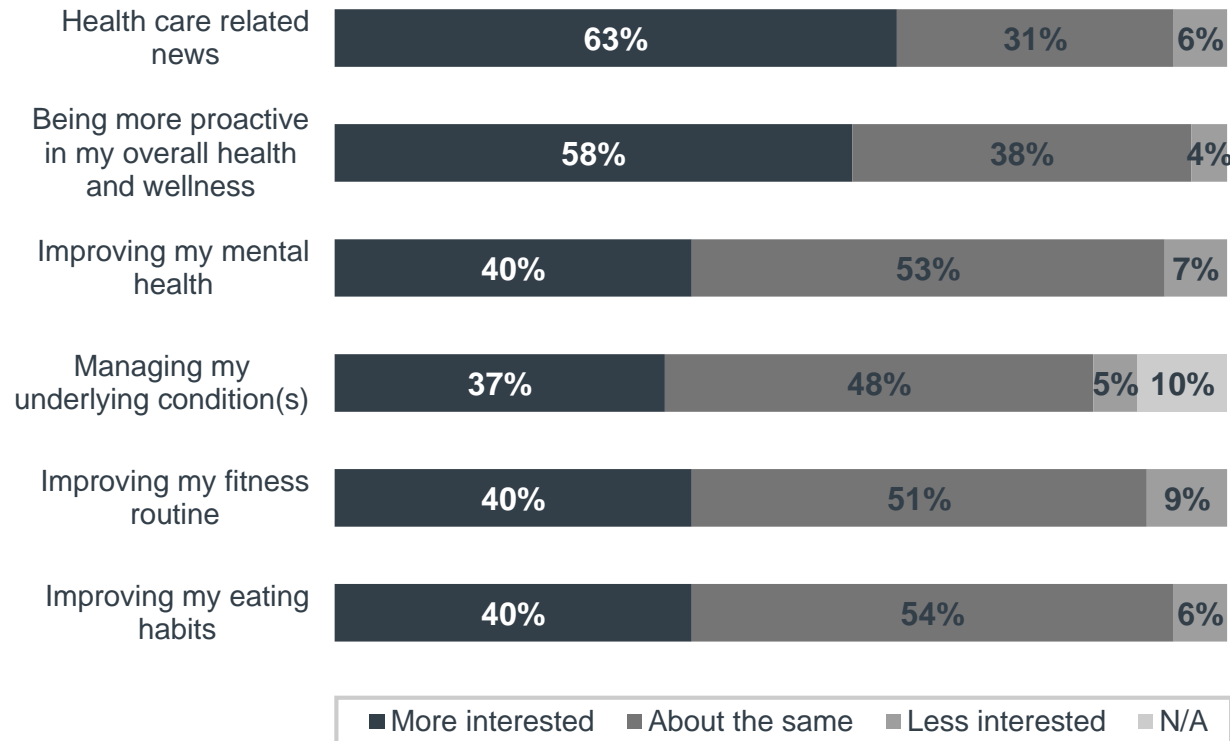| Generation	Employment	Insurance
Gen Z (Ages 18-23)	58%	23%
Millennial (Ages 24-39)	44%	18%
Gen X (Ages 40-55)	30%	9%
Boomer (Ages 56-74)	18%	2%
Silent (Ages 75-93)	6%	1%

1. Includes becoming unemployed, having hours reduced, or being furloughed.

Consumers more engaged in personal health than before

Knowing someone impacted by Covid-19 or losing insurance increases interest

How Covid-19 has changed consumer interest in health

n=7,452

	More interested	About the same / Less interested	N/A
Health care related news	63%	31%	6%
Being more proactive in my overall health and wellness	58%	38%	4%
Improving my mental health	40%	53%	7%
Managing my underlying condition(s)	37%	48%	5% / 10%
Improving my fitness routine	40%	51%	9%
Improving my eating habits	40%	54%	6%

■ More interested ■ About the same ■ Less interested ■ N/A

Subgroups more interested than national average

	Has a chronic condition	Know someone impacted by Covid-19	Lost insurance
	n=1,385	*n=2,201*	*n=694*
Health care related news	70%	75%	78%
Being more proactive in my overall health and wellness	66%	67%	70%
Improving my mental health	44%	52%	59%
Managing my underlying condition(s)	56%	45%	59%
Improving my fitness routine	41%	50%	60%
Improving my eating habits	45%	50%	58%

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Roadmap

Getting patients back in the door

Consumers asked to weigh relative importance of 24 safety and data attributes

Summary of attributes tested and proportional utility across categories

n=7,452

▷ MaxDiff Survey Methodology

- Asked consumers to rank the importance of 24 attributes in increasing comfort with returning to a clinic for care

- Responses were converted into utility scores, which are a measure of the importance of each attribute

- The higher the utility score for an individual attribute, the more it was valued over other attributes

- Utility scores sum to 100

TREATMENT OR VACCINE FOR COVID-19
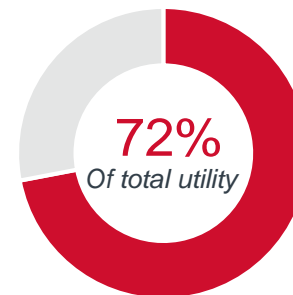
2 attributes, including:

- Effective and widely available vaccine

- Approved and effective medicine that reduces symptoms and recovery time

22%
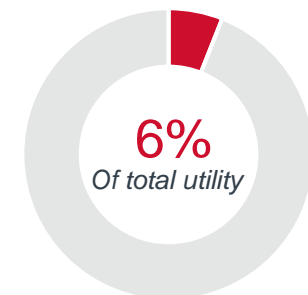*Of total utility*
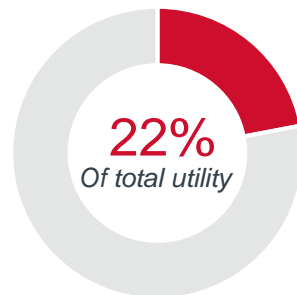
CLINIC SAFETY AND SANITATION PROTOCOLS

18 attributes, including:

- Screening/testing
- Visitor policies
- Staff policies
- Facility designations
- Sanitization
- Masking
- Distancing

72%
Of total utility

LOCAL INFECTION AND HOSPITALIZATION RATES

4 attributes, including:

- State infection rates
- State fatality rates
- State hospitalization rates

6%
Of total utility

Board

2020 Advisory Board • All rights reserved • **advisory.com**

9

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Top 10 rankings largely consistent across consumers

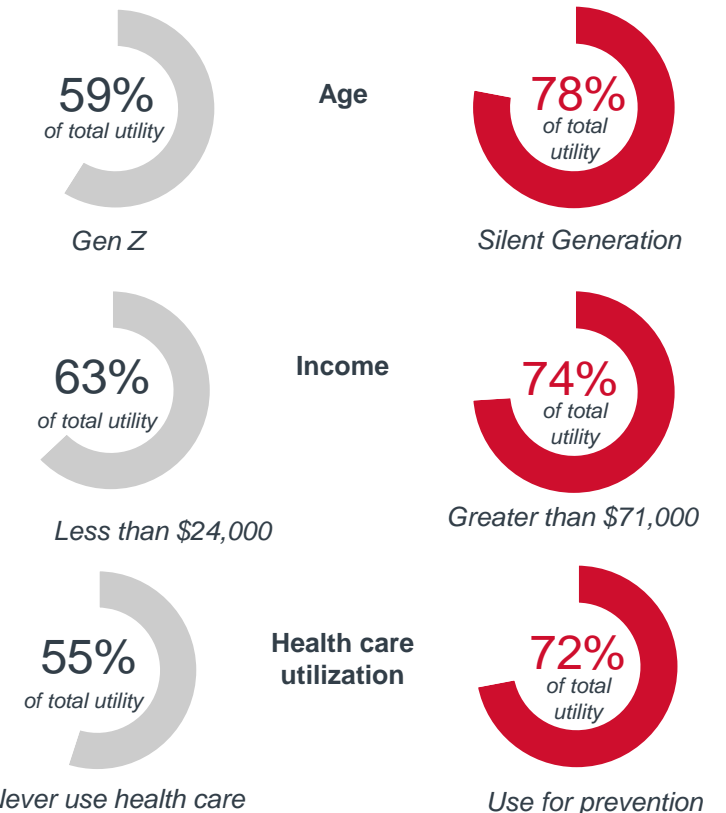## Consumers most want a vaccine, rapid testing, and exam room sanitization

Top 10 attributes that would increase comfort with seeking in-person care
n=7,452

1. There is a widely available vaccine for Covid-19, and I have received it **(15.63)**

2. Exam rooms are sanitized after each patient **(8.74)**

3. The clinic rapidly tests all patients when they arrive for their appointment **(8.41)**

4. Approved, widely available medicine that reduces Covid-19 symptoms and recovery time **(6.42)**

5. Clinic screens temperatures when patients enter the building **(6.10)**

6. All staff are rapidly tested for Covid-19 every day **(5.78)**

7. Staff treating Covid-19 patients will not treat me **(5.29)**

8. All staff wear masks at all times **(4.67)**

9. The clinic has patients wait in their car, rather than in the waiting room **(4.25)**

10. There is enough space for patients to stay 6 feet apart at all times **(3.95)**

Utility placed on top 10 attributes
Benchmark: 69% for national cohort

Age

59% of total utility
Gen Z

78% of total utility
Silent Generation

Income

63% of total utility
Less than $24,000

74% of total utility
Greater than $71,000

Health care utilization

55% of total utility
Never use health care

72% of total utility
Use for prevention

Vaccine access is more important than any single clinic feature

Value increases with age and income

#1

"There is a widely available vaccine for Covid-19, and I have received it"

National Utility = 15.63

Factors that do not impact the importance of a vaccine

- Gender
- Personal health care utilization patterns
- Severity of local Covid-19 outbreaks
- Knowing someone diagnosed, hospitalized, or deceased due to Covid-19

Who is most interested in an effective Covid-19 vaccine?

Bolded number shows utility of attribute

Age

- Boomers *(ages 56-74)* **19.29**
- Silent Generation *(ages 75-93)* **20.3**

A vaccine's importance increases with age. Older consumers gave the attribute nearly **2x** as much utility as Gen Zers and Millennials.

Younger generations distributed their utility across a greater number of features, including:

- symptom screening
- contactless check-in/check-out
- pre-appointment testing and self-quarantine protocols

Income

- Greater than $71,000 **20.29**

Consumers making less than $24,000 are **half** as interested in a Covid-19 vaccine.
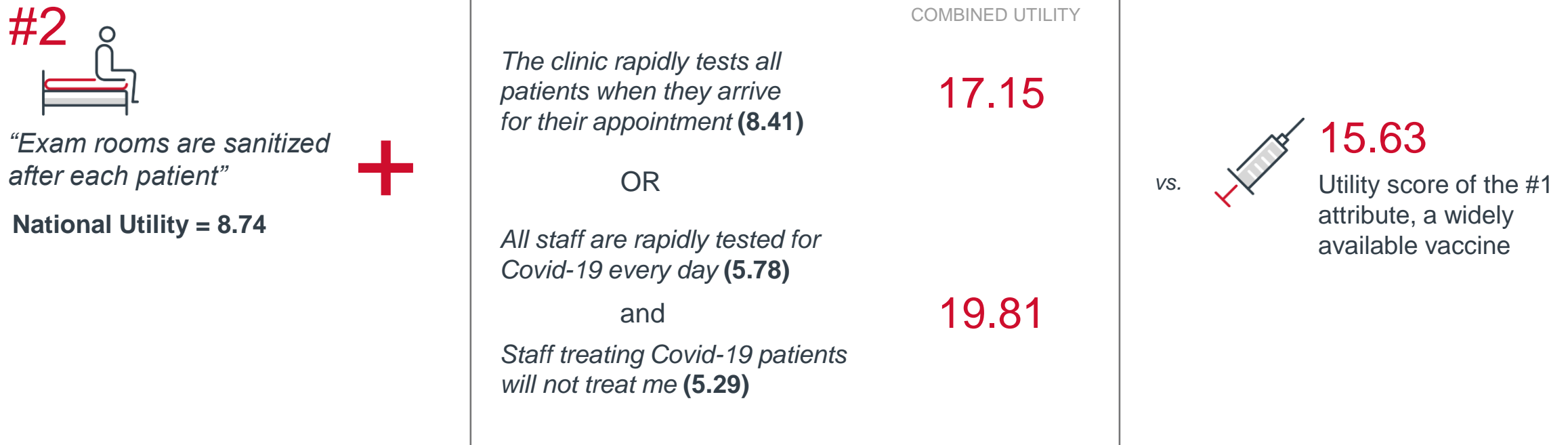
Though a vaccine ranks first for all groups, lower-income consumers distributed their utility across additional features, including:

- masks for staff and patients
- readily available hand sanitizer throughout the clinic
- sanitization of common spaces

Clinics can make changes to achieve the comfort of a vaccine

Smart combinations of safety and process changes can make a big impact

Sample Changes to Raise Patient Comfort Levels Equivalent to Vaccine

#2

"Exam rooms are sanitized after each patient"

National Utility = 8.74

\+

COMBINED UTILITY

The clinic rapidly tests all patients when they arrive for their appointment **(8.41)**

OR

All staff are rapidly tested for Covid-19 every day **(5.78)**

and

Staff treating Covid-19 patients will not treat me **(5.29)**

17.15

19.81

vs.

15.63

Utility score of the #1 attribute, a widely available vaccine

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

To make trade-offs, look at utility across and within categories
Sanitizing an exam room is 4x as important as providing hand sanitizer

Clinic attributes and their impact on patient comfort with seeking care
n=7,452

A **SANITIZATION** *(14% of total utility)*
- Exam rooms are sanitized after each patient **(8.74)**
- Common spaces are sanitized every hour **(3.27)**
- Hand sanitizer is available throughout the clinic **(2.09)**

B **TESTING** *(11% of total utility)*
- Clinic tests all patients at the clinic, using a rapid test **(8.41)**
- Clinic tests and has patients self-quarantine before their visit **(2.94)**

C **STAFF** *(11% of total utility)*
- Staff are rapidly tested for Covid-19 every day **(5.78)**
- Staff treating Covid-19 patients will not treat me **(5.29)**

D **FACILITY AND LOCATION** *(10% of total utility)*
- Clinic has patients wait in car instead of waiting room **(4.25)**
- Clinic currently does not treat Covid-19 patients **(3.46)**
- Clinic is in a stand-alone building, not at a hospital **(1.82)**
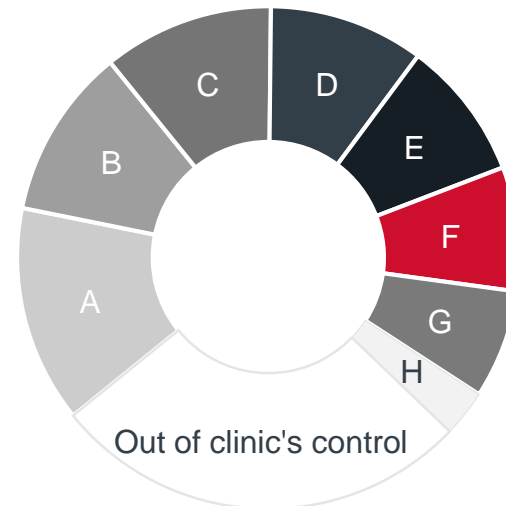
E **SCREENING** *(9% of total utility)*
- Clinic screens temperatures upon entry **(6.10)**
- Clinic screens every individual by checking symptoms **(2.62)**

F **MASKING** *(8% of total utility)*
- All staff wear masks at all times **(4.67)**
- All individuals are provided with masks upon entry **(3.36)**

G **PHYSICAL DISTANCING** *(7% of total utility)*
- Enough space for patients to stay 6 feet apart at all times **(3.95)**
- The clinic provides contactless check-in and check-out **(2.51)**
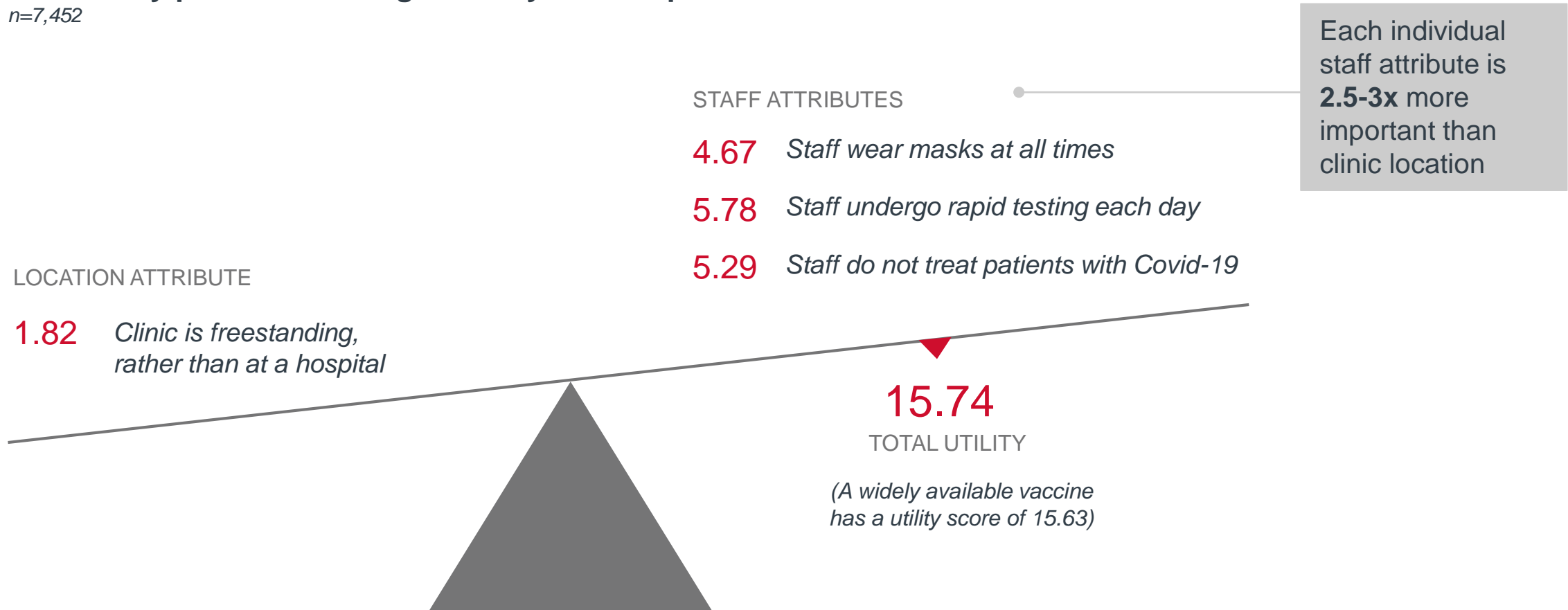
H **VISITOR POLICIES** *(3% of total utility)*
- Visitors are not allowed to accompany patients **(1.48)**
- Patients are allowed to bring a visitor with them **(1.39)**

Out of clinic's control

Don't worry about where your clinic is located

Focus on who is providing care and the safety precautions they're taking

Staff safety protocols are significantly more important than location
n=7,452

Each individual staff attribute is **2.5-3x** more important than clinic location

STAFF ATTRIBUTES

4.67 *Staff wear masks at all times*

5.78 *Staff undergo rapid testing each day*

5.29 *Staff do not treat patients with Covid-19*

LOCATION ATTRIBUTE

1.82 *Clinic is freestanding, rather than at a hospital*

15.74

TOTAL UTILITY

(A widely available vaccine has a utility score of 15.63)

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Avoid leading with statewide Covid-19 data and visitor policies

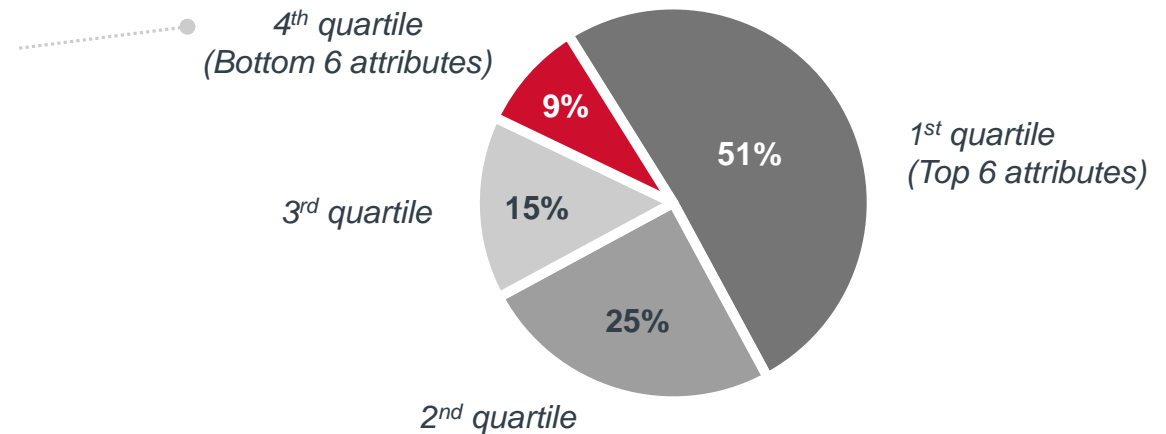Consumers place greater weight on the tangible changes they can see in-clinic

Utility scores of bottom-ranked attributes

n=7,452

Rank	Attribute	Utility
19	My state has had a decline in daily new confirmed cases across the last week	1.71
20	My state has had a decline in daily confirmed deaths across the last week	1.53
21	Visitors are not allowed to accompany patients to reduce crowding	1.48
22	Patients are allowed to bring a visitor with them	1.39
23	My state has had a decline in daily hospitalizations across the last week	1.31
24	My state has fewer than 50 current cases	1.26

1: n=7,452

How utility is distributed across attributes

4th quartile (Bottom 6 attributes)

9%

1st quartile (Top 6 attributes)

51%

3rd quartile

15%

2nd quartile

25%

▶ **Consumer characteristics that do not impact rankings**

- Gender
- Income
- Knowing someone with Covid-19
- Local outbreak levels

Roadmap

Patients looking to providers for specific Covid-19 resources

Testing information, alternative care options, and online symptom-checker top list

Information and resources that consumers want from providers amid Covid-19

n=7,452

	Ranked 1st	Ranked 2nd	Ranked 3rd
Gen Z	Online symptom-checker if I suspect I have Covid-19	Information about when and where to get tested, what to expect	Alternative options for accessing routine health care services
Millennials	Online symptom-checker if I suspect I have Covid-19	Information about when and where to get tested, what to expect	Alternative options for accessing routine health care services
Gen X	Information about when and where to get tested, what to expect	Alternative options for accessing routine health care services	Tips for how to keep you and/or your family safe from Covid-19
Boomers	Information about when and where to get tested, what to expect	Alternative options for accessing routine health care services	Online symptom-checker if I suspect I have Covid-19
Silent Generation	Information about when and where to get tested, and what to expect	Tips for how to keep you and/or your family safe from Covid-19	Alternative options for accessing routine health care services

Two choices were *not ranked* in the top 3 by any generation:

- Access to mental health care services
- Access to clinical trials for emerging treatments and/or vaccines for Covid-19

RESOURCE
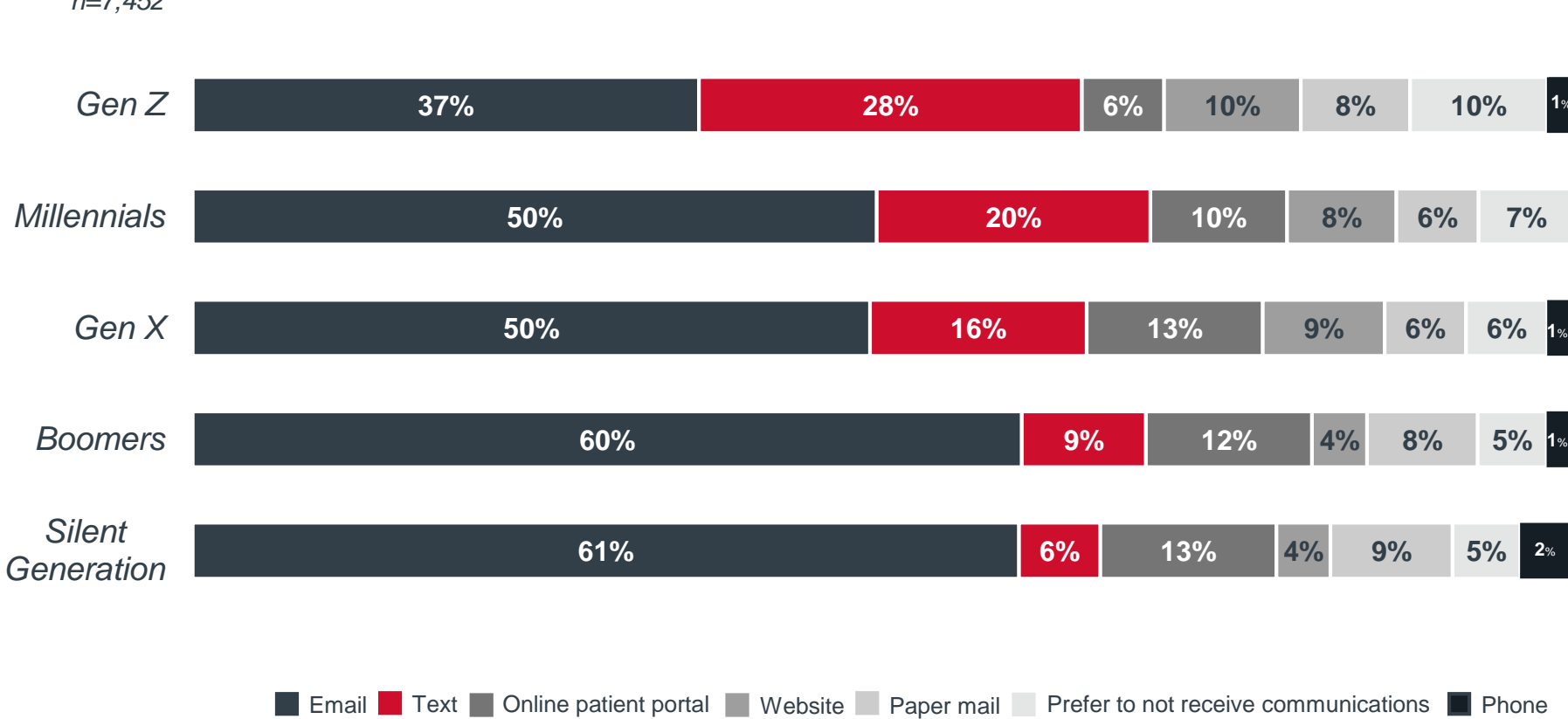
[Communicating with Patients Amid Covid-19](#)

This guide includes details to consider when crafting messages for consumers, example communications from health care providers, and insight into what makes a message effective.

Most consumers want updates from providers by email

Younger consumers also open to communicating by text and patient portal

Preferred channel for receiving communications from health care providers about Covid-19

n=7,452

Generation	Email	Text	Online patient portal	Website	Paper mail	Prefer to not receive communications	Phone
Gen Z	37%	28%	6%	10%	8%	10%	1%
Millennials	50%	20%	10%	8%	6%	7%	
Gen X	50%	16%	13%	9%	6%	6%	1%
Boomers	60%	9%	12%	4%	8%	5%	1%
Silent Generation	61%	6%	13%	4%	9%	5%	2%

Legend: ■ Email ■ Text ■ Online patient portal ■ Website ■ Paper mail ■ Prefer to not receive communications ■ Phone

DATA SPOTLIGHT

#1 Email is the most preferred communication channel for all generations

Text becomes less attractive as age increases

Online patient portals are the second-best way to communicate with older consumers

Twice as many Gen Zers prefer no contact from their providers than Boomers or the Silent Generation
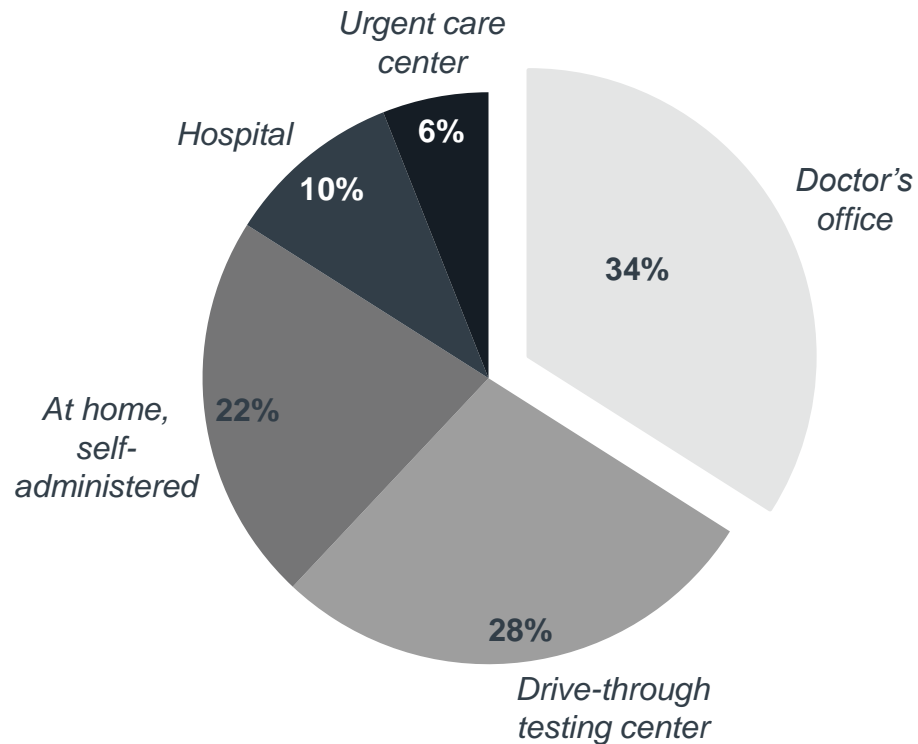
Roadmap

Advisory Board

Consumers prefer the doctor's office for Covid-19 testing

Urgent care centers and the hospital are the least attractive options

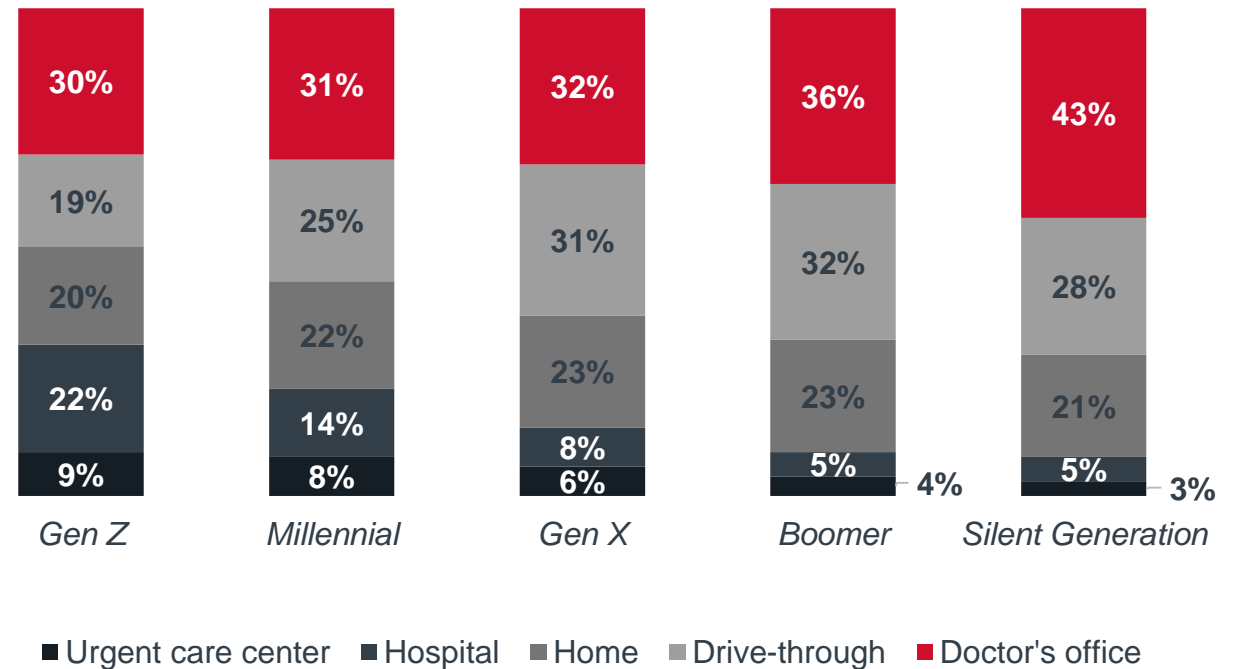**Preferred setting for Covid-19 testing**
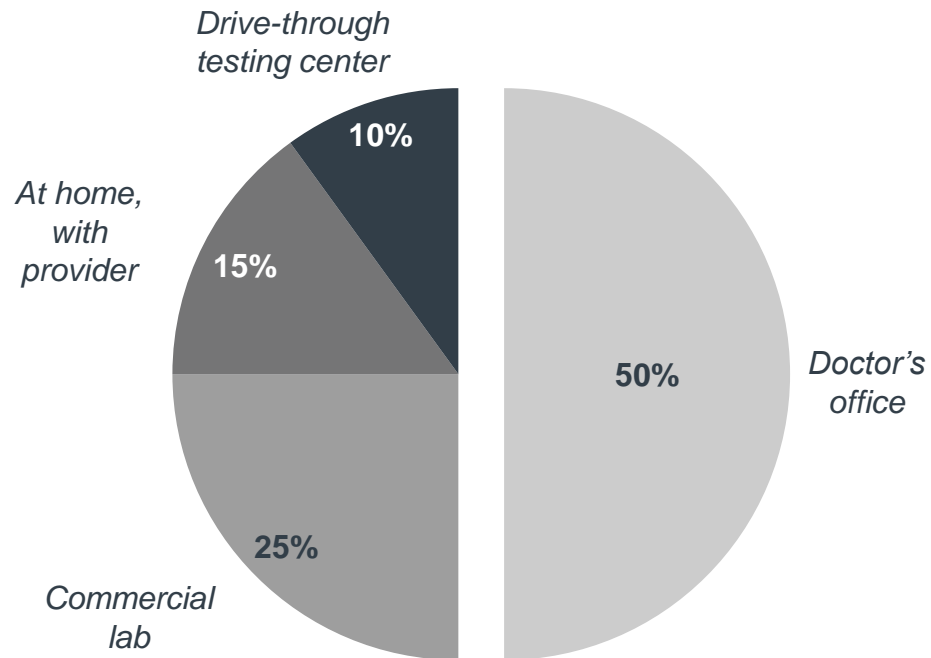
n=7,452

All Adults

Urgent care center 6%

Hospital 10%

Doctor's office 34%

At home, self-administered 22%

Drive-through testing center 28%

By Generation

	Gen Z	Millennial	Gen X	Boomer	Silent Generation
Doctor's office	30%	31%	32%	36%	43%
Drive-through	19%	25%	31%	32%	28%
Home	20%	22%	23%	23%	21%
Hospital	22%	14%	8%	5%	5%
Urgent care center	9%	8%	6%	4%	3%

■ Urgent care center ■ Hospital ■ Home ■ Drive-through ■ Doctor's office

Physician offices are also preferred for routine bloodwork
Preference is strongest for the oldest and youngest consumers

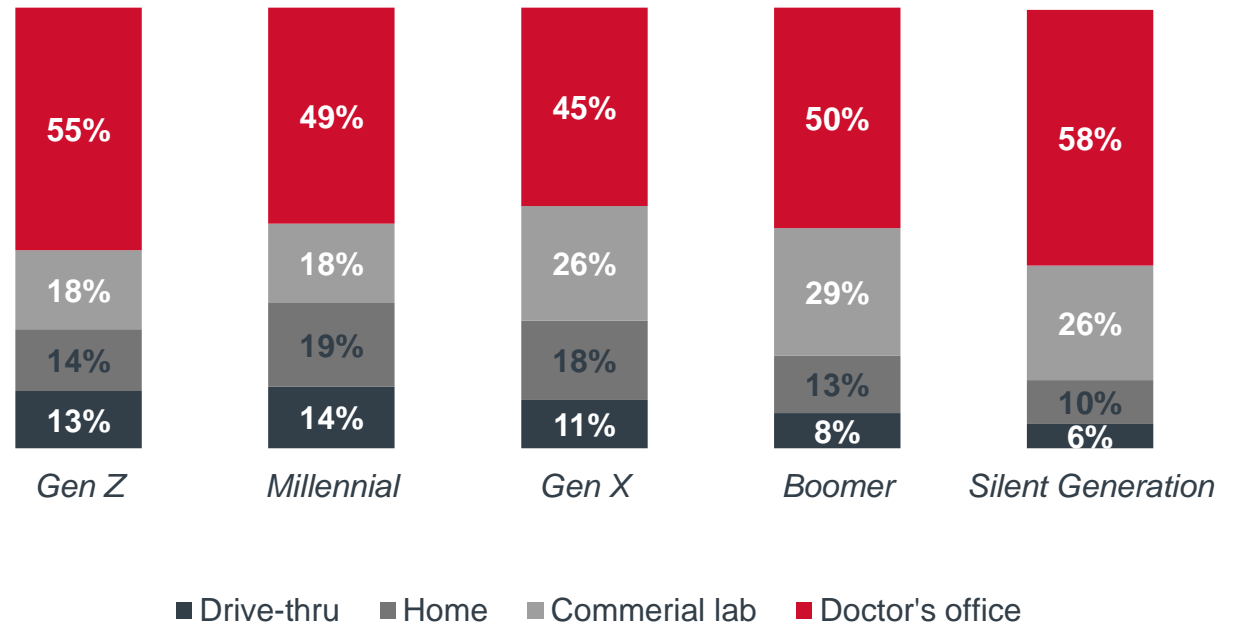**Preferred setting for routine bloodwork**
n=7,452

All Adults

Drive-through testing center — 10%
At home, with provider — 15%
Commercial lab — 25%
Doctor's office — 50%

By Generation

	Gen Z	Millennial	Gen X	Boomer	Silent Generation
Doctor's office	55%	49%	45%	50%	58%
Commercial lab	18%	18%	26%	29%	26%
Home	14%	19%	18%	13%	10%
Drive-thru	13%	14%	11%	8%	6%

■ Drive-thru   ■ Home   ■ Commerial lab   ■ Doctor's office

Roadmap

Survey methodology

What question formats did you use?

The survey included Likert scale questions, multiple choice questions, rank-order questions, and questions following a MaxDiff methodology.

What is a MaxDiff?

We used MaxDiff methodology to identify consumers' preferences. Respondents were shown multiple screens of five attributes, from which they chose the single most attribute, and the single least important attribute. Each attribute was presented multiple times, resulting in a ranked list of utility scores indicating the relative value of each attribute.
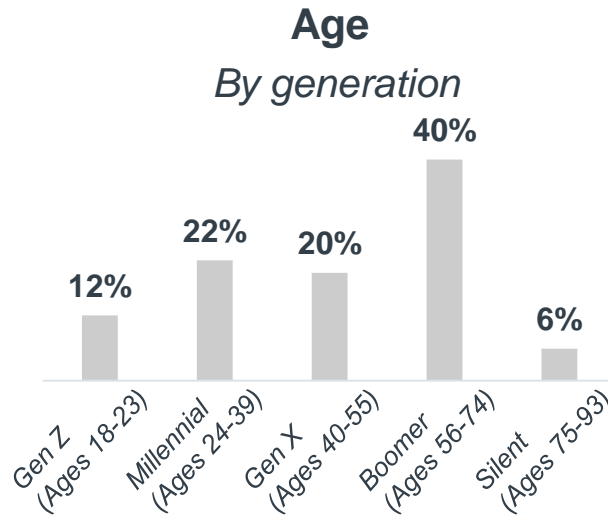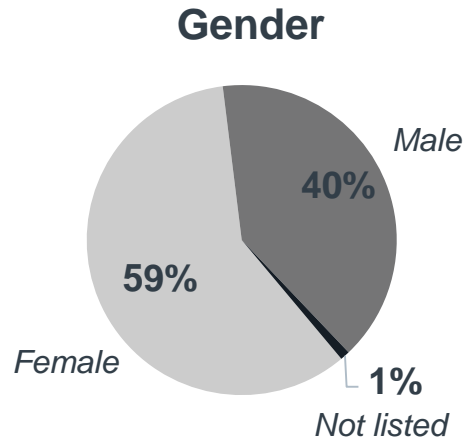
In this survey, respondents were shown 24 attributes related to consumer care preferences in the Covid-19 era. These included clinic-specific features, as well as general sentiments around vaccines and treatment for Covid-19 and local Covid-19 caseloads. For the full ranked lists of attributes, see pages 24-25.

What is a utility score?

Utility scores are a measure of importance. Ranging from 0 to 100, they show us which MaxDiff attributes were most important, and how they ranked relative to one another. The higher a utility score, the more a respondent valued that attribute over others they were shown.

Survey respondent profile

Gender

- Male **40%**
- Female **59%**
- Not listed **1%**

Age
By generation

Generation	Percent
Gen Z (Ages 18-23)	12%
Millennial (Ages 24-39)	22%
Gen X (Ages 40-55)	20%
Boomer (Ages 56-74)	40%
Silent (Ages 75-93)	6%

Covid-19 Outbreak Severity
By cases in county

- Low impact (<100 cases) **21%**
- High impact (>2k cases) **31%**
- Medium impact (100-2k cases) **48%**

Income

Income	Percent
$24k or less	**19%**
$24k to 48k	**25%**
$48k to 71k	**25%**
$71k or more	**31%**

Region

Region	Percent
West	**24%**
Midwest	**20%**
South	**37%**
Northeast	**19%**

1. n=7,452

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

MaxDiff: National Ranking of 12 Most-Valued Attributes

Rank	Attribute	Average Utility
1	There is a widely available vaccine for COVID-19, and I have received it	15.63%
2	Exam rooms are sanitized after each patient	8.74%
3	The clinic tests all patients for Covid-19 when they arrive for their appointment, using a rapid test	8.41%
4	Approved and widely available treatment for Covid-19 that reduces symptoms and recovery time	6.42%
5	Clinic screens every patient for Covid-19 by taking their temperature before they enter the building	6.10%
6	All staff are rapidly tested every day to ensure they don't test positive	5.78%
7	Staff treating Covid-19 patients will not treat me	5.29%
8	All staff wear masks at all times	4.67%
9	The clinic has patients wait in their car, rather than in the waiting room	4.25%
10	There is enough space that patients can stay 6 feet apart from each other at all times	3.95%
11	The clinic does not currently treat Covid-19 patients	3.46%
12	All individuals are provided with masks upon entry	3.36%

1. n=7,452

MaxDiff: National Ranking of 12 Least-Valued Attributes

Rank	Attribute	Average Utility
13	Common spaces are sanitized every hour	3.27%
14	Clinic tests all patients for Covid-19 several days before their appointment and asks them to self-quarantine until they come in	2.94%
15	The clinic screens every individual for Covid-19 by asking if they've experienced symptoms	2.62%
16	The clinic provides contactless check-in and check-out	2.51%
17	Hand sanitizer is available throughout the clinic	2.09%
18	The clinic is a stand-alone building, not at a hospital	1.82%
19	My state has had a decline in daily new confirmed cases across the last week	1.71%
20	My state has had a decline in daily confirmed deaths across the last week	1.53%
21	Visitors are not allowed to accompany patients to reduce crowding	1.48%
22	Patients are allowed to bring a visitor with them	1.39%
23	My state has had a decline in daily hospitalizations across the last week	1.31%
24	My state has fewer than 50 current cases	1.26%

1. n=7,452

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Related resources

RESOURCE
Communicating with patients amid Covid-19
Read now

RESOURCE
Covid-19 strategic planning survey
Read now

TEMPLATE
Consumer loyalty framework
Read now

EXPERT INSIGHT
How hospitals are communicating with patients and the community about Covid-19
Read now

RESOURCE
Competing on consumer experience
Read now

LIBRARY
All your consumer choice survey resources— on one page
Read now

RESOURCE
How Covid-19 is impacting non-hospital sites of care
Read now

RESOURCE
Creating a consumer-focused digital strategy
Read now

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Market Innovation Center

Project Director

Rebecca Tyrrell, MS

tyrrellr@advisory.com

Research Team

Sharareh Afshani

Avery Morrison

Program Leadership

Alicia Daugherty

LEGAL CAVEAT

Advisory Board has made efforts to verify the accuracy of the information it provides to members. This report relies on data obtained from many sources, however, and Advisory Board cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, Advisory Board is not in the business of giving legal, medical, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, members should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given member's situation. Members are advised to consult with appropriate professionals concerning legal, medical, tax, or accounting issues, before implementing any of these tactics. Neither Advisory Board nor its officers, directors, trustees, employees, and agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by Advisory Board or any of its employees or agents, or sources or other third parties, (b) any recommendation or graded ranking by Advisory Board, or (c) failure of member and its employees and agents to abide by the terms set forth herein.

Advisory Board and the "A" logo are registered trademarks of The Advisory Board Company in the United States and other countries. Members are not permitted to use these trademarks, or any other trademark, product name, service name, trade name, and logo of Advisory Board without prior written consent of Advisory Board. All other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names, and logos or images of the same does not necessarily constitute (a) an endorsement by such company of Advisory Board and its products and services, or (b) an endorsement of the company or its products or services by Advisory Board. Advisory Board is not affiliated with any such company.

IMPORTANT: Please read the following.

Advisory Board has prepared this report for the exclusive use of its members. Each member acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to Advisory Board. By accepting delivery of this Report, each member agrees to abide by the terms as stated herein, including the following:

1. Advisory Board owns all right, title, and interest in and to this Report. Except as stated herein, no right, license, permission, or interest of any kind in this Report is intended to be given, transferred to, or acquired by a member. Each member is authorized to use this Report only to the extent expressly authorized herein.

2. Each member shall not sell, license, republish, or post online or otherwise this Report, in part or in whole. Each member shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.

3. Each member may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or membership program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each member shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each member may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.

4. Each member shall not remove from this Report any confidential markings, copyright notices, and/or other similar indicia herein.

5. Each member is responsible for any breach of its obligations as stated herein by any of its employees or agents.

6. If a member is unwilling to abide by any of the foregoing obligations, then such member shall promptly return this Report and all copies thereof to Advisory Board.

655 New York Avenue NW, Washington DC 20001
202-266-5600 | **advisory.com**