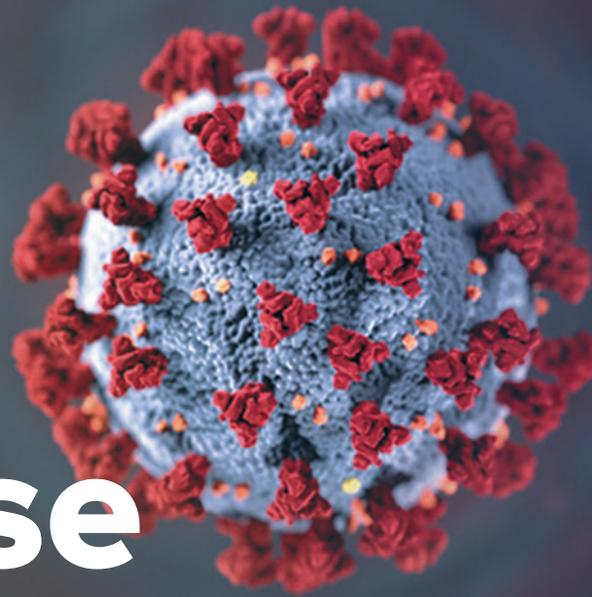


Sage Growth/Blackbook Research

COVID-19 Market Pulse

U.S. Healthcare Needs and Attitudes in the Age of COVID-19

National crisis is driving increased consumer interest in telehealth



A new survey of 500 U.S. consumers conducted by Sage Growth Partners (SGP) and Black Book Market Research found that, during a time when much of the world has changed due to the Coronavirus, people are concerned about getting their healthcare needs addressed. In addition, concerns about the safety of healthcare settings are driving an increased interest in virtual care options such as telehealth.

The appetite for telehealth is growing, but many consumers are confused or unsure about its availability

Only one quarter of respondents have used telehealth in the past, but 59% are interested in using it in the future, and more than a third would leave their provider to access telehealth. This underscores the need for more healthcare providers to embrace virtual care.

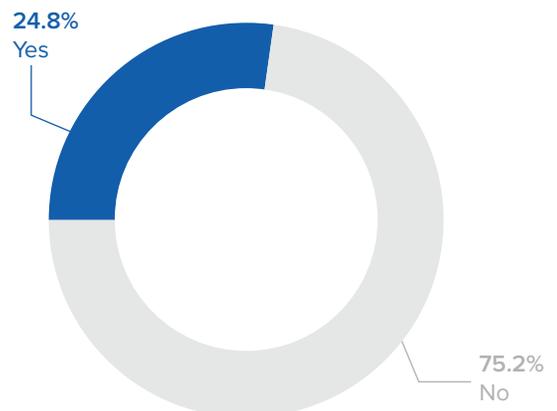
Only **25%** of respondents have used telehealth previously

59% are more likely to use telehealth services now than previously; **19%** are not; **22%** are not sure

44% say telehealth services are available to them; **35%** are unsure; **21%** do not believe they have access

36% would switch their physician in order to have access to virtual care

Figure1: Telehealth adoption amongst US Consumers

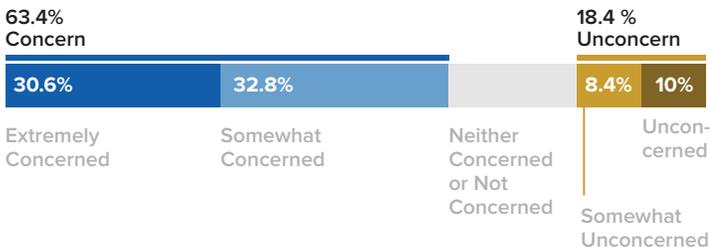


Q. Have you ever used a virtual care (such as a telehealth visit app?)
Responses for Yes and No. N=500.

64% are concerned about getting their healthcare needs addressed in the next 4 weeks.

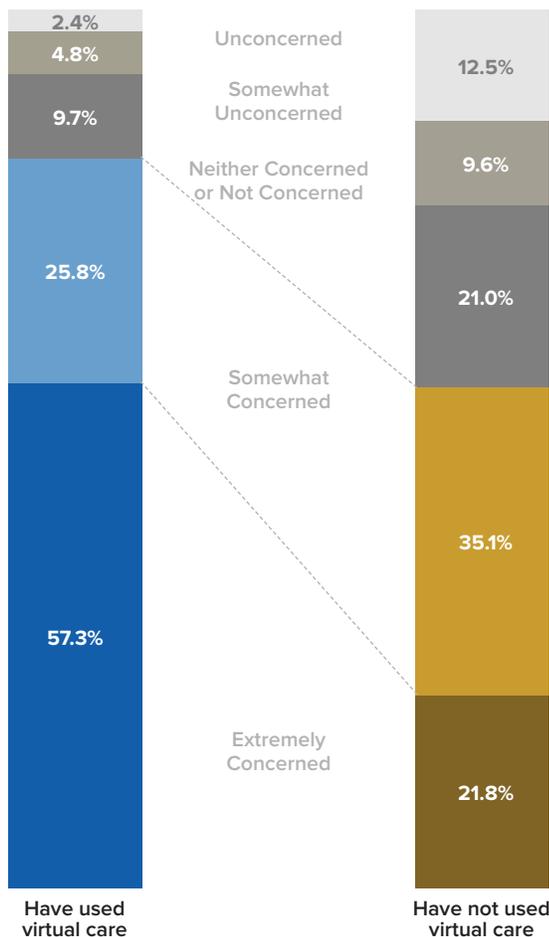
Those who have used virtual care are more than twice as likely to be concerned about this than those who haven't.

Figure 2: 4-week healthcare needs



Q. How concerned are you about getting your healthcare needs addressed in the next four weeks? Responses as seen above. N=500

Figure 3: Healthcare concern by telehealth users



Q. How concerned are you about getting your healthcare needs addressed in the next four weeks? 5 point Likert as seen above. Q. Have you ever used a virtual care (such as a telehealth visit app)? Responses: Yes and No. N=500

Nearly one in three Americans are unsure about their safety in doctors' offices, hospitals and urgent care centers.

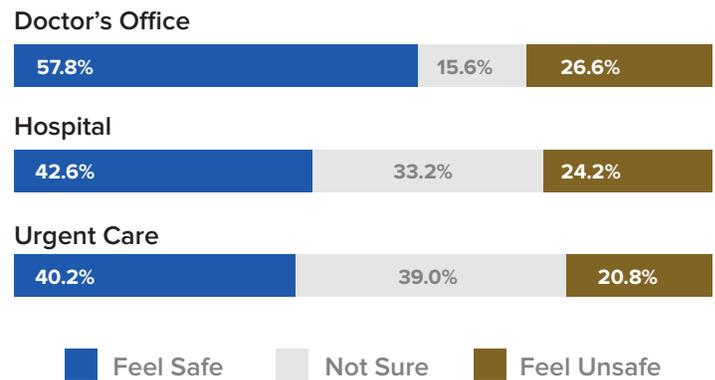
They feel safer at their doctor's office than in an urgent care or hospital setting. Women are far less likely to feel safe going to a hospital than men (29% vs. 55%).

58% feel safe going to the doctor's office; 27% feel unsafe; 16% are unsure

Only 43% feel safe getting treatment at a hospital, 33% feel unsafe, 24% are not sure

Only 40% feel safe at urgent care; 31% feel unsafe, 21% are unsure

Figure 4: Safety by care location



Q. I feel safe going to my doctor's office? Responses Extremely Safe, Somewhat Safe, Not Safe or Unsafe, Somewhat Unsafe, Extremely Unsafe. Q. I would feel safe getting treatment at a hospital? Responses Yes, No, Unsure. Q. I would feel safe getting treatment at an urgent care? Responses Yes, No, Unsure. N=500

Only slightly more than one third believe that testing for COVID-19 is adequate and available to all who need it.

Only 24% of women, compared to 43% of men, feel that it is adequate and readily available. Most of the country seems to have gotten the message that the U.S. has been slow to ramp up to the level of testing needed.

Figure 5: Confidence in testing



Q. I believe that testing for the Corona virus is adequate and available to all who need it? Responses Yes, No, Unsure. N=500

Nearly half want more access to remote behavioral or mental health services

Virtual care can increase access to behavioral health services to those with high levels of anxiety and social isolation at a time when many in-person visits are being curtailed.

45% would like more access to virtual behavioral or mental health services for anxiety, depression and social isolation; 43% would not; 12% are unsure

Figure 6: Access to remote behavioral and mental services



Q. I would like more access to remote behavioral or mental health services for anxiety, depression, social isolation? Responses Yes, No, Not sure. N=500

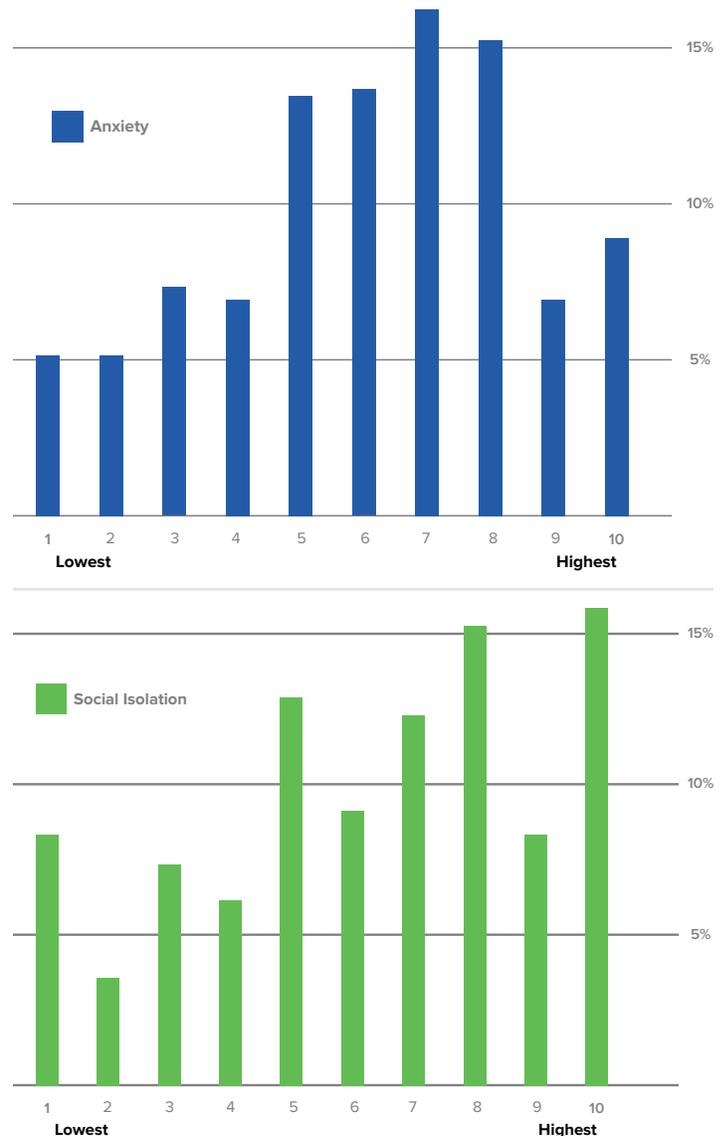
Feelings of anxiety and social isolation are high

Given the major upheaval to American society in recent weeks as additional cities and states close non-essential services on a near-daily basis, and as unemployment rates soar, this finding is not surprising. It will be interesting to use this data as a benchmark to track how feelings of anxiety and isolation change in coming weeks.

47% report that their anxiety is high (7 or above on a scale of 1 to 10, where 1 is low)

51% report feeling very isolated (7 or higher)

Figure 7: Anxiety and social isolation levels



Q. Where is your current anxiety level? & Q. How socially isolated do you feel? Responses ranked 1-10, 1-lowest, 10 highest. N=500

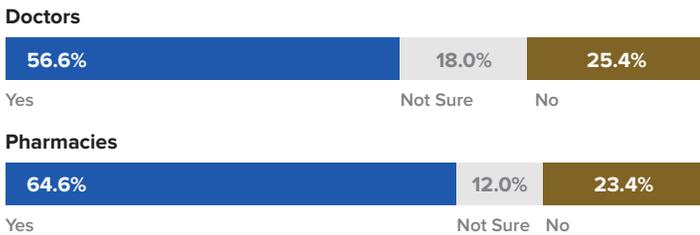
In the face of significant supply chain challenges, about one in three consumers aren't sure that their doctors and pharmacies have the supplies they need.

They have slightly more confidence about the availability of pharmacy supplies than medical supplies.

18% do not believe their providers have the supplies and ability to keep supplies stocked to meet medical needs; **25%** aren't sure; **57%** believe they do

12% don't believe their pharmacy is well stocked to meet their needs; **23%** aren't sure; **65%** believe they are

Figure 8: Access to supplies by setting



Q. I believe that my provider has the supplies and the ability to keep supplies stocked, to meet my medical needs? I believe my pharmacy is well stocked and can meet my needs? Responses Yes, No, Not sure. N=500.

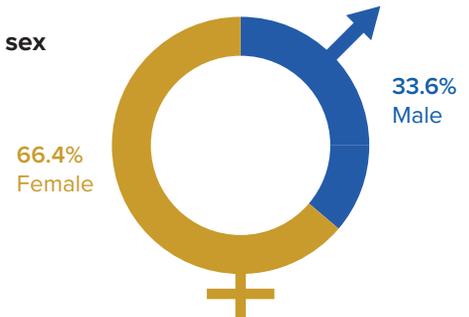
Conclusions

Survey participants' responses reflect the mood of uncertainty and fear that is prevalent in the country as the number of COVID-19 cases has exploded. Telehealth offers Americans an option to seek care without exposing themselves to the risk of infection, and allows providers to continue to connect with many patients and continue providing many needed medical services despite the pandemic. Behavioral telehealth is a key desired service at a time of heightened anxiety.

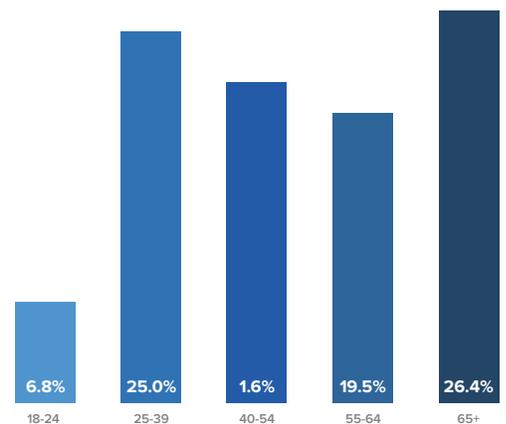
Methodology

Sage Growth Partners (SGP), a Baltimore-based healthcare research, strategy, and marketing firm, conducted the survey in partnership with Black Book Market Research. The survey, which is aimed at assessing the challenges, needs, and perspectives of U.S. healthcare consumers during the COVID-19 pandemic, was administered to 500 U.S. healthcare consumers the week of March 23, 2020. SGP and Black Book plan to periodically re-administer the survey to determine if and how attitudes change during the crisis. Z-test (Confidence Interval) for samples sizes >30 will show the margin of error in standard deviations for the test. This data we collected was representative for all 50 states across state, gender and age, and this sample falls into the norm so it did not require any weighting. Our data collection would then fall into the standard margin of error for these types of studies showing (+/-)5% error. We successfully tested at 90% and 95% confidence levels in the survey.

Respondents by sex



Respondents by age



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