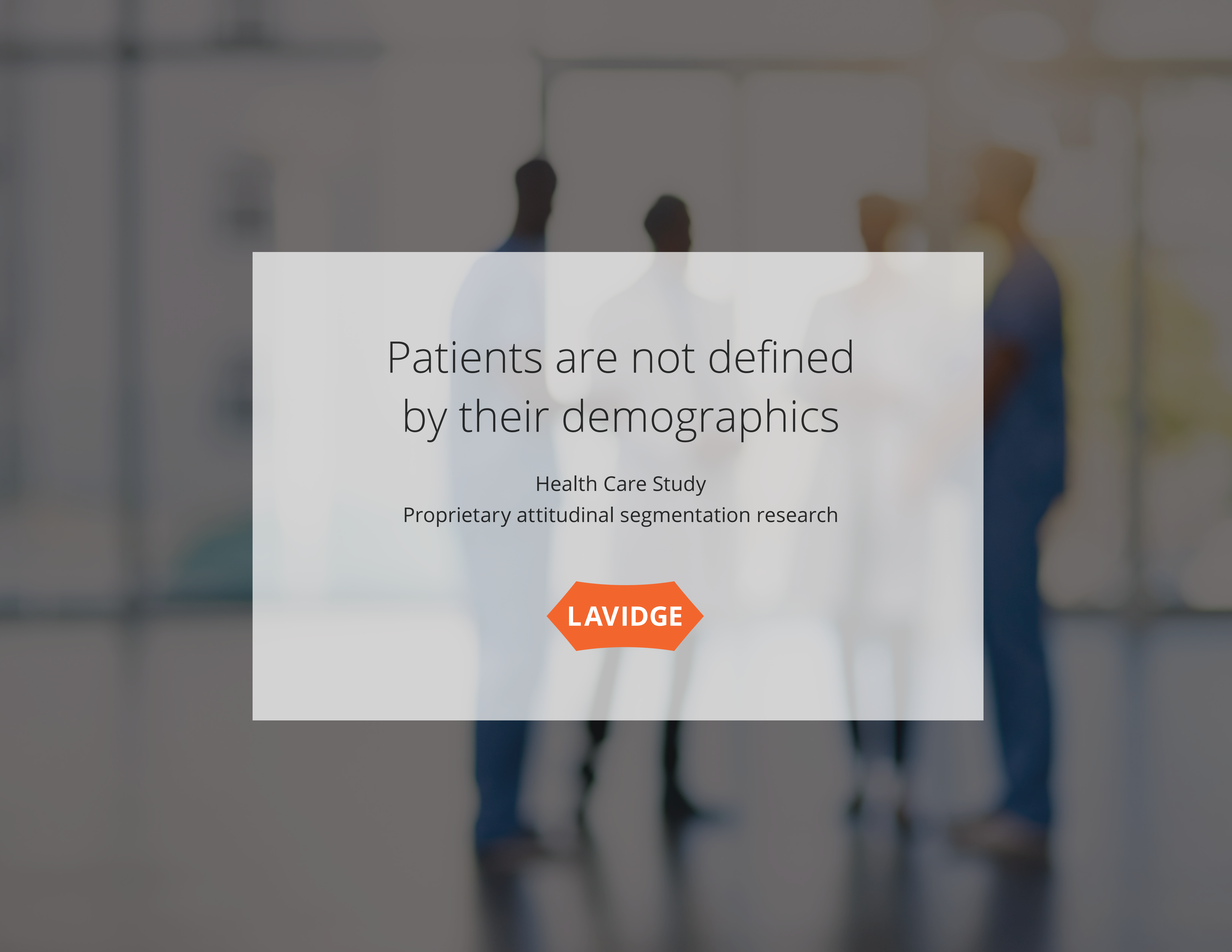


Patients are not defined by their demographics

Health Care Study

Proprietary attitudinal segmentation research

LAVIDGE

Contents

Research overview and methodology

Research overview

A few months before the pandemic, LAVIDGE embarked on a major initiative to help health care companies gain better insight into the attitudes and motivations of health care consumers.

The agency partnered with Audience Audit Inc. to design and field a custom quantitative attitudinal segmentation study of 1,000 American health care consumers who match overall U.S. demographic profiles based on age, gender, race and income, and who make health care decisions for their households.

All respondents report accessing health care services within the previous six months, and 95% have health insurance.

Study goals

The study was designed to explore how consumers feel about health, their health care options, experiences and health care policy, and how these are correlated with usage, pricing sensitivity, provider choice, and demographic characteristics.

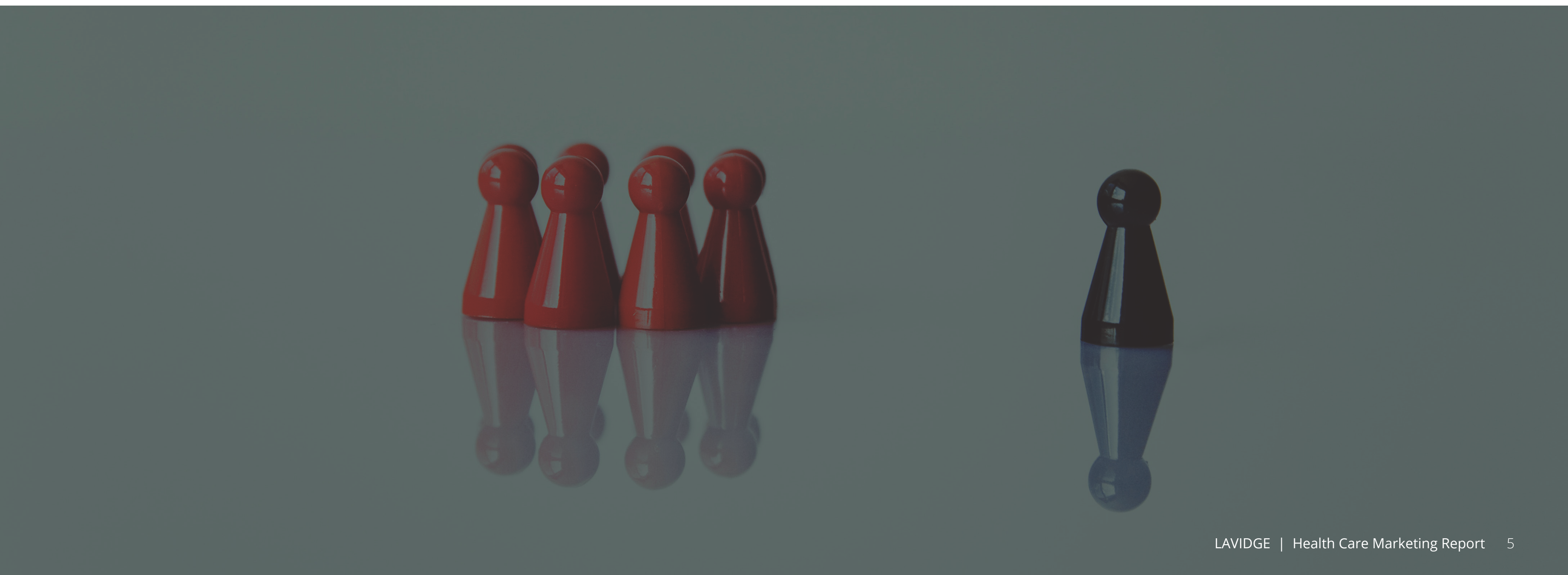
The analysis was designed to organically reveal audience segments based on the attitudes they share with each other and which differentiate them from other groups in the study. The segment characteristics were not predetermined—they arose from the analysis of more than 45 attitudes which each respondent rated in terms of their level of agreement or disagreement. The segmentation analysis did not incorporate any demographic or other information beyond the attitudinal ratings.

Attitudinal segmentation

Segmentation is based exclusively on ratings of attitudinal statements.

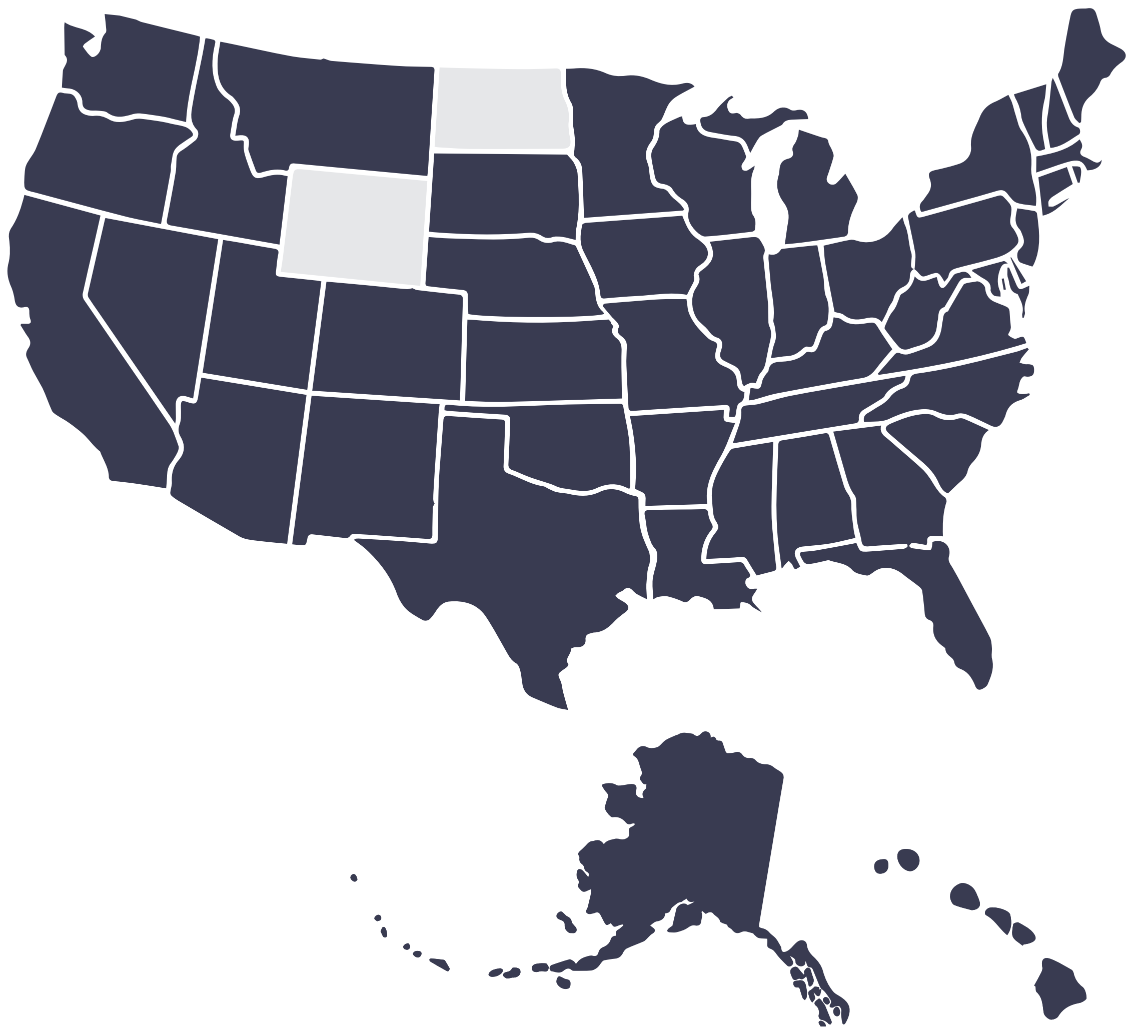
- Neither the number of segments nor their defining attitudes were predetermined.
- All resulted organically from a purely mathematical analysis.

Each segment represents a group of respondents for whom a particular group of attitudes are strongly connected.



Methodology

- National survey – 48 states represented
- 1,000 total respondents
- Margin of error at 95% confidence
- +/- 3.0 percentage points



Health care patient segments

The four attitudinal segments we uncovered

TEAM PLAYER

Team Player respondents like and trust their doctors and feel in control of their health care. They are confident they'll always have access to quality health care.

25% of survey respondents

BYSTANDER

Bystander respondents are intimidated by health care and health care providers. They avoid it whenever possible.

29% of survey respondents

CRUSADER

Crusader respondents feel strongly that all should have equal access to quality care and find diversity important. They are worried about the cost of care.

26% of survey respondents

BOSS

Boss respondents do their own research and are comfortable challenging their doctors. They prefer alternative approaches to care.

20% of survey respondents

*Segments are **not** defined by demographic characteristics

TEAM PLAYER

TEAM PLAYER: OVERVIEW

Team Player consumers like their doctors, trust the advice that they give and typically follow their recommendations. They believe innovations in medicine are helping patients get better care.

They believe health care coverage should be managed by medical professionals, and that their local health care options provide the same quality as those elsewhere in the country. They trust hospitals to care about their health and say the hospitals in their communities are focused on keeping people healthy and out of the hospital.

These consumers have health insurance that gives them good access to health care, understand their health care options, and feel that they are in control of their health care. They are confident that they will always have access to affordable, quality health care.

I'm pretty healthy and do whatever I can to maintain a healthy lifestyle. I watch my diet, I don't smoke, I exercise and stay on top of all my wellness exams.

I like and trust my doctors and typically follow their recommendations. They are definitely more knowledgeable than me, regarding conditions affecting my health. My doctors understand me and really care about keeping me healthy, which explains why I'm so loyal to them.

I've always had good health insurance and am confident I'll always have access to affordable health care. Maintaining good health insurance has given me access to quality health care my entire life. I trust in the medical community and believe they are best served to manage health care coverage.

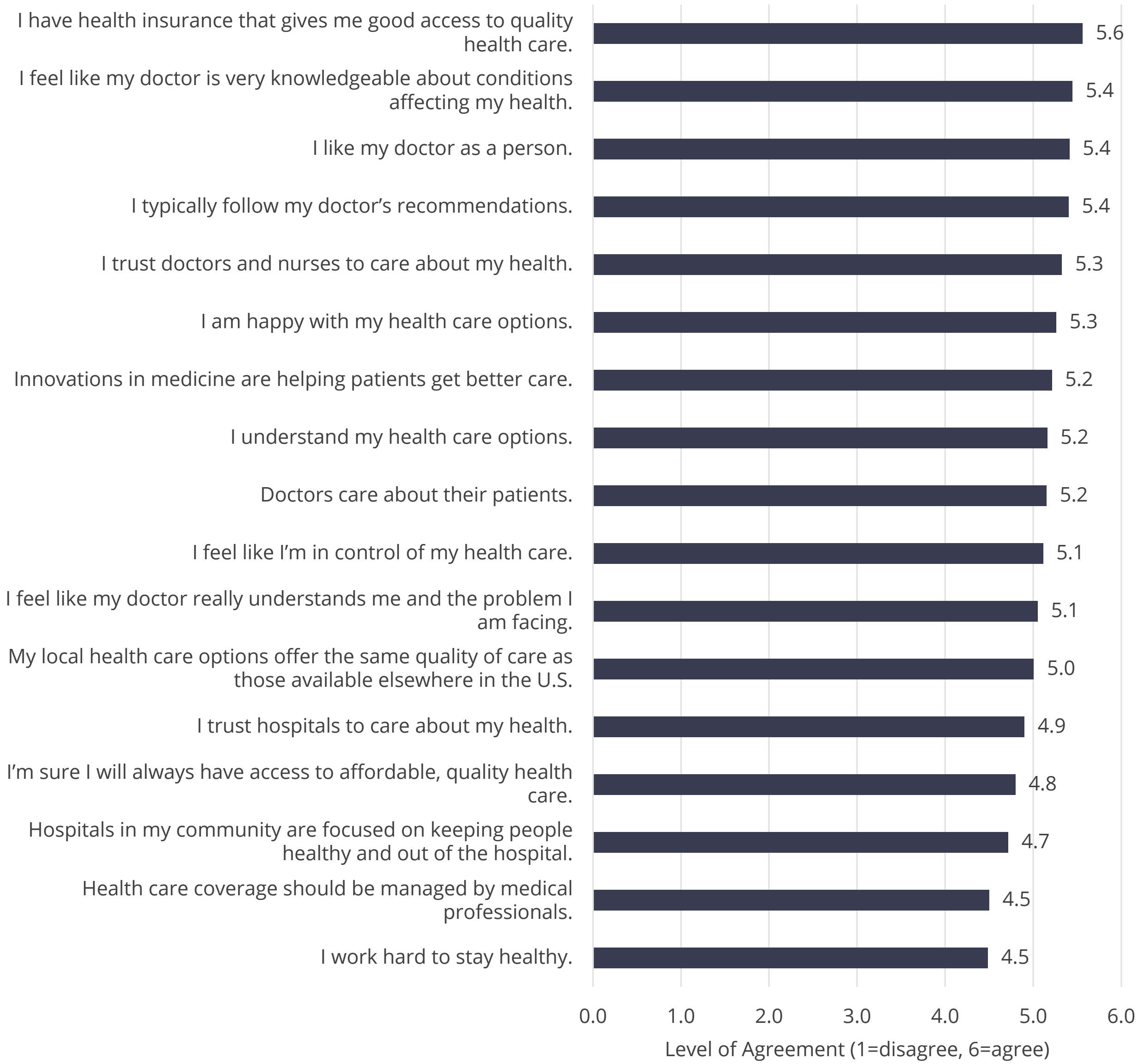
I'm very positive about the future of health care and believe innovations in medicine are helping patients get better care and live longer lives. Call me old-fashioned, but I tend to trust standardized medicine over alternative approaches. I understand my health care options and feel I'm in more control because of them.

If there is a true emergency, I have no problem going to the hospital and trust they care about my health just as much as my primary care physician (PCP). Too many people go to the hospital when they don't have life-threatening emergencies. It isn't necessary and creates an even greater strain on the health care system as well as those who have real emergencies.

Bottom line, I am diligent about staying on top of my health maintenance. I do my best to stay healthy and trust my doctors are doing their best to keep me healthy too.

TEAM PLAYER: ATTITUDES

How do you feel about the following statements?



TEAM PLAYERS like and trust their doctors and feel in control of their health care.

They are confident they'll always have access to quality health care.

TEAM PLAYER: GENERAL CHARACTERISTICS

This segment is not exclusively defined by demographic characteristics.

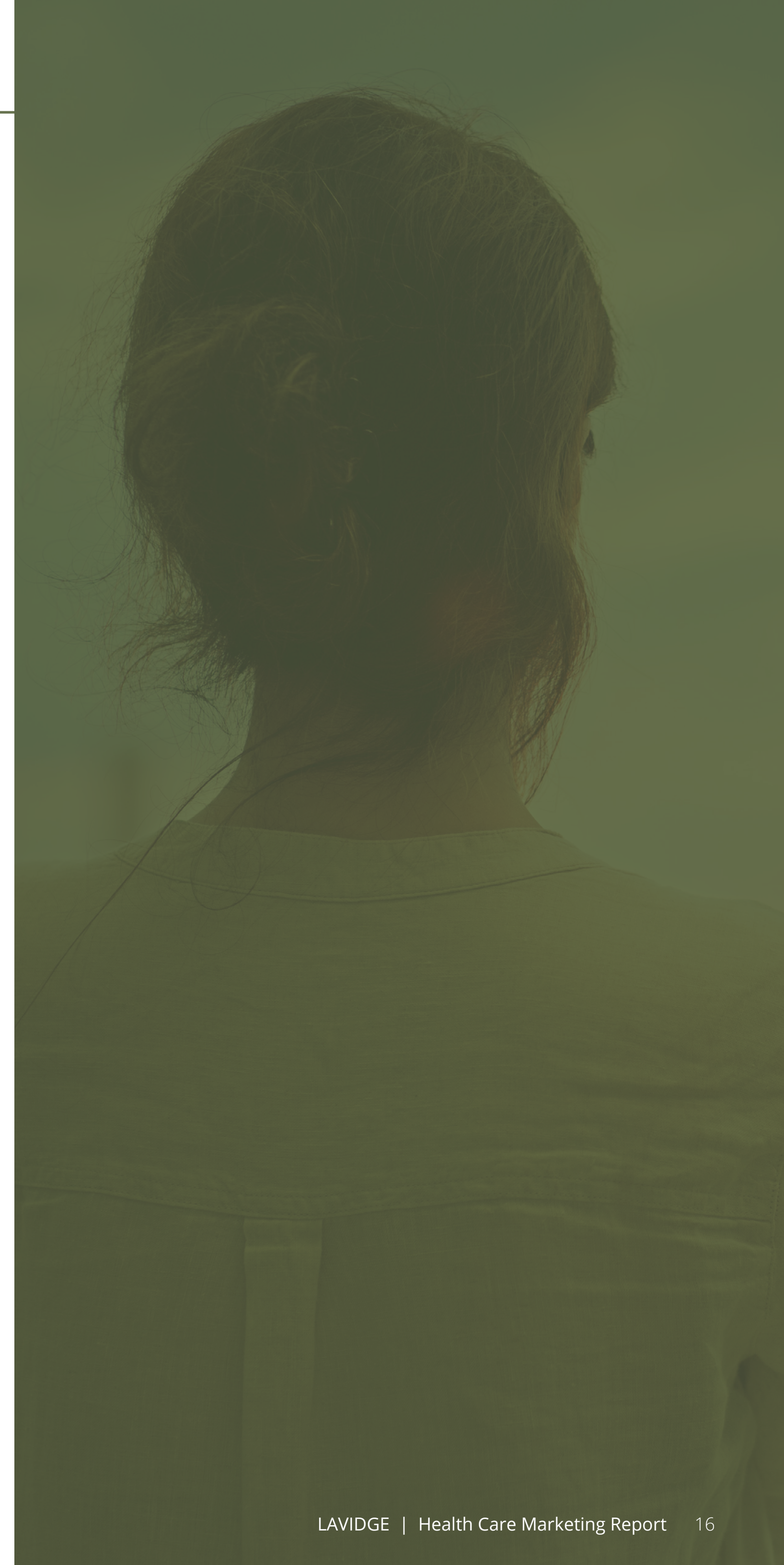
The differences in demographic distribution are small—following are some of the notable differences:

- **34%** $75,000-$149,999 annual HHI
- **32%** $35,000-$74,999 annual HHI
- **49%** are 65+ and **18%** are 55-64
- **54%** are Male
- **100%** have health insurance
- **68%** have used health care in the last month
- **86%** visit doctors for typical wellness checkups (more than other segments)
- **62%** typically visit a doctor or PCP office for non-emergency care
- **71%** are very loyal to their PCP, 39% are very loyal to a particular hospital, 32% to a particular clinic (41% are very loyal to a particular hair stylist)
- **20%** responsible for child, 10% responsible for elderly family member
- **38%** have no interest in alternative medicine
- **HIGH PERCENTAGE** believes many things (diet, smoking, exercise, drinking, wellness exams, etc. affect a person's overall health "a lot"
- **51%** are very interested in a healthy lifestyle

BYSTANDER

Bystander consumers are intimidated by health care and health care providers. They are much more likely to say they often go without health care—both because they're too busy or can't afford it—but are even more likely to avoid health care because they are fearful of what they might learn. They are intimidated by doctors in general and are afraid to ask a lot of questions during an appointment.

They are more likely to say that health care coverage should be managed by the government, that the emergency room is a good resource for medical care even for non-emergent conditions, and that they are unlikely to be affected by technological advances in health care.



I'm not really someone who stays on top of my preventive health maintenance. I don't worry much about the newest diet, exercise trend or technological advances to keep me healthy; none of that has much impact on the way I live my life. And if I get sick or hurt, I'll deal with it when it comes along.

When I say that I'll "deal with it," that doesn't always mean going to the doctor. If I need medical help, I'll just go to the urgent care or emergency room. Honestly, I try to stay as far away from doctors as possible. I'm intimidated by doctors, I'm afraid to ask them questions and always fearful they are going to tell me something I don't want to hear. I would actually trust more alternative treatments such as medical marijuana or CBD than medicines prescribed by doctors.

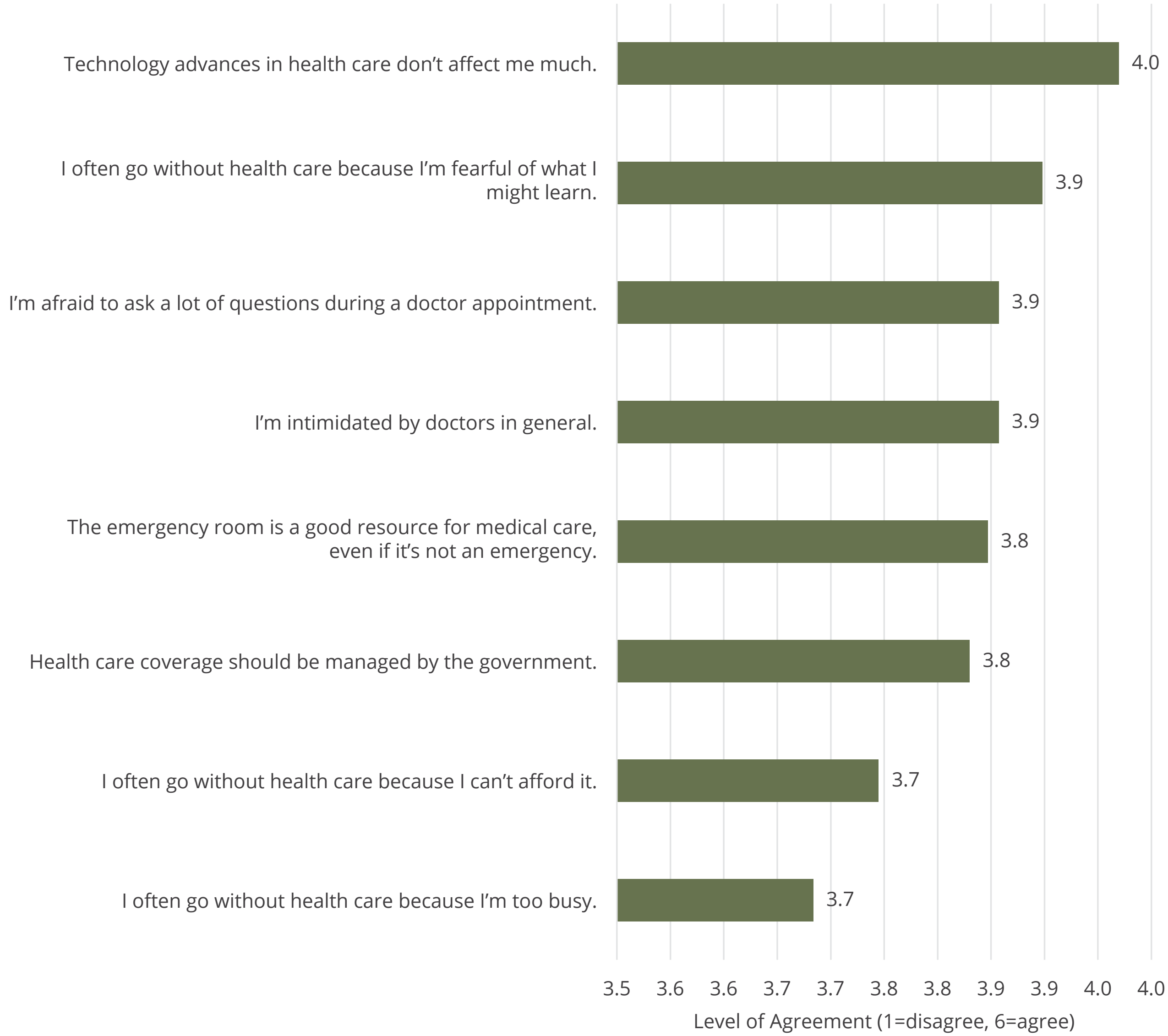
I often neglect my own health care for a number of reasons. Beside my fear of doctors, the associated costs and time needed for appointments aren't luxuries I have at my disposal. I'm caring for others and believe their health care should be first and foremost. I just don't have time or money to do everything.

Even though I have health insurance through my employer, I rarely take full advantage of it. Whether it's getting a physical examination, getting my teeth cleaned or having my vision checked, every appointment quickly adds up to more time and money. I don't want to spend my time or money in that way.

I realize I could probably be more proactive about taking care of my health. However, every time I visit a doctor they seem to have bad news. I'd rather just deal with health issues myself, when and if they come along.

BYSTANDER: ATTITUDES

How do you feel about the following statements?



BYSTANDER respondents are intimidated by health care and health care providers.

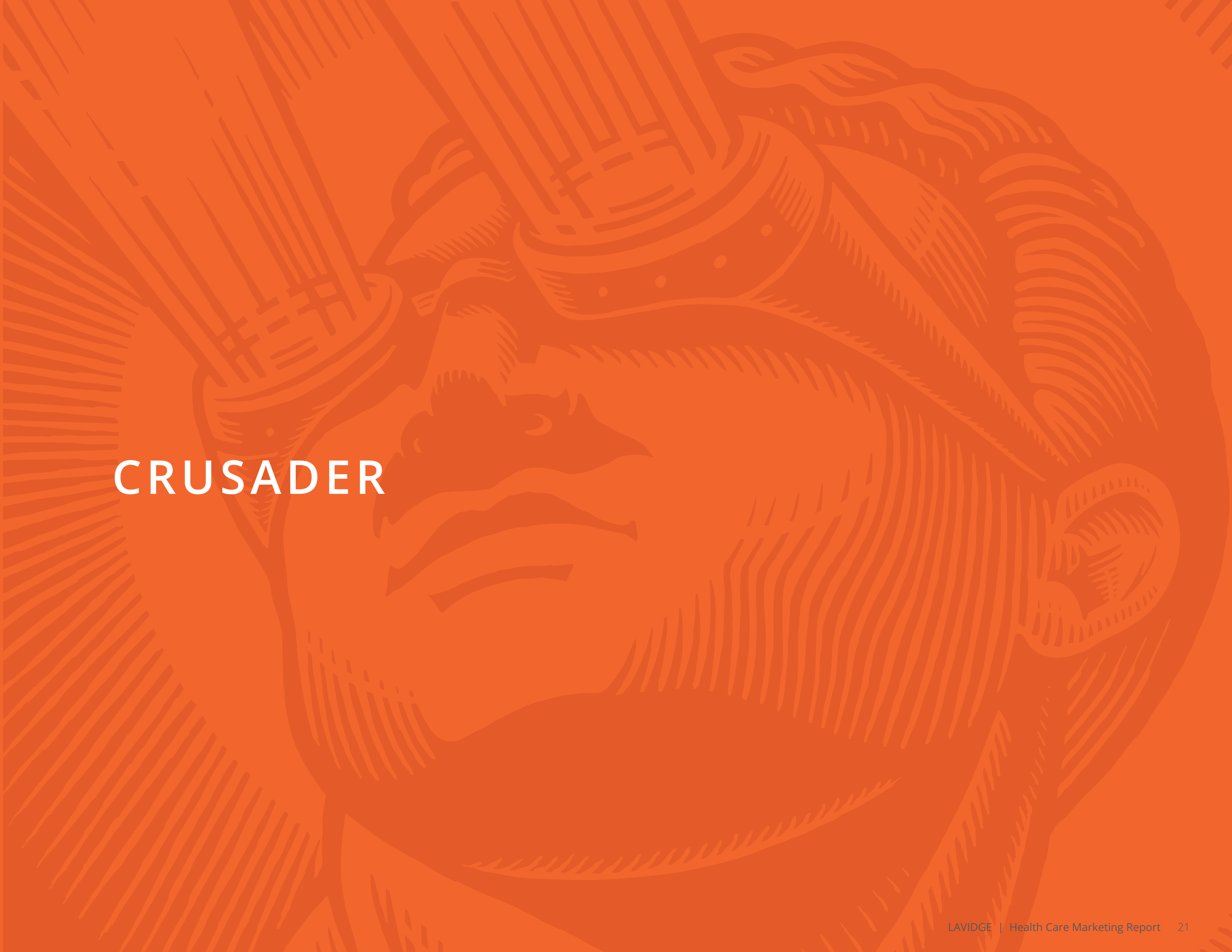
They avoid both whenever possible.

BYSTANDER: GENERAL CHARACTERISTICS

This segment is not exclusively defined by demographic characteristics.

The differences in demographic distribution are small—following are some of the notable differences:

- **44%** are less than 35 years of age
- **23%** are 35-44 years of age
- **37%** below $35,000 annual HHI
  32% $35,000-$74,999 annual HHI
- **52%** female
- **90%** have health insurance
- **45%** have used health care in the last month
- **55%** visit doctor for typical wellness checkups (lower than other segments)
- **26%** typically visit a doctor or PCP office for non-emergency care
- **24%** visit an urgent care center
- **33%** are very loyal to their PCP
- **24%** are very loyal to a particular hospital
  21% to a particular clinic
  22% are very loyal to a particular hair stylist
- **45%** responsible for child
  27% responsible for elderly family member
- Some interest in alternative medicine:
  24% cannabis for medical purposes
  22% healing oils like CBD)
- **MUCH LOWER PERCENTAGE** believes many things (diet, smoking, exercise, drinking, wellness exams, etc.) affect a person's overall health "a lot"
- **40%** are very interested in a healthy lifestyle
  11% not very interested (more than other segments)



CRUSADER

CRUSADER: OVERVIEW

Crusader consumers believe everyone should be able to have health insurance, and that everyone living in the U.S. should have access to the same level of health care. They are very concerned about the cost of health care.

They also believe that medical facilities should take care of the whole person—mind, body and spirit—not just treat their medical condition. They say hospitals should take a leadership role in keeping their communities healthy, and that diversity is important—that it's good for hospitals to have ethnically diverse staff members and physicians, and that as long as a doctor is qualified and provides good care it doesn't matter where they come from.

I try to stay as healthy as I can by watching my diet, exercising and avoiding bad habits. I'm proactive about my wellness exams and do my best to stay as healthy as possible.

I'm fortunate that I'm relatively healthy and have good health insurance coverage, in the event an emergency arises. But not everyone has the same peace of mind. Unfortunately, every American does not have health insurance coverage. And as a country, we're not adequately serving every citizens and ultimately will be paying the price.

In addition to not serving our citizens properly, I'm growing increasingly concerned about the overall health care system in the U.S. and hope we can work together to improve it for everyone. The cost of health care is getting out of control and doesn't provide equal access to all U.S. citizens. It's a shame.

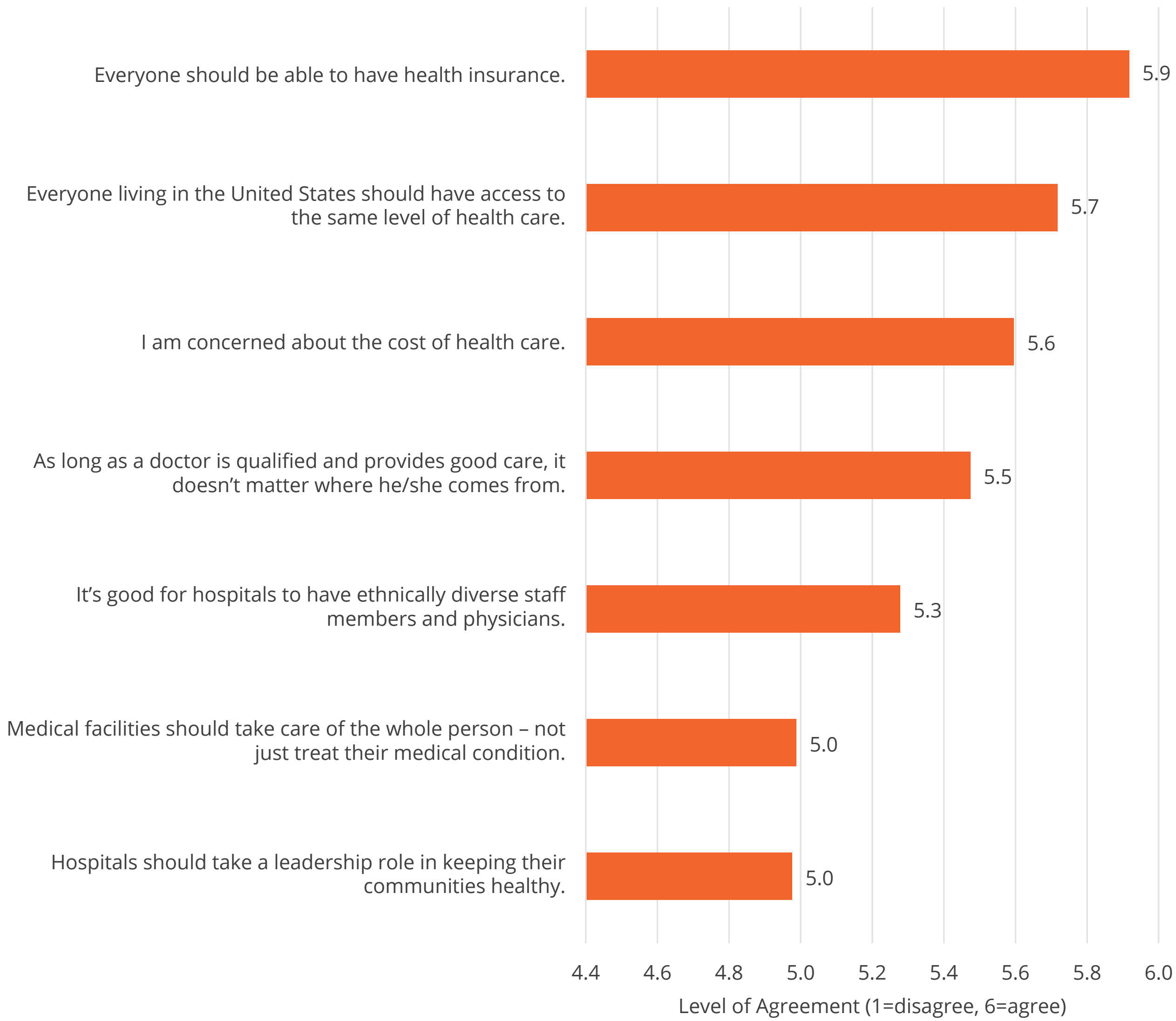
Not only do we, as individuals, have responsibility to advocate for better health care and more inclusive health coverage, hospitals and health care facilities have a role in doing their parts. Medical facilities should be focused on keeping their communities healthy and treating the whole person—mind, body, spirit.

We are all in this together. Without a unified approach to affordable and accessible health care for all U.S. citizens, we are doing a disservice to our current and future generations.

I believe good medical treatment options aren't always traditional and can come from different cultures and experiences. We should embrace staff and physician diversity in our hospitals and medical facilities as well as not being judgmental about their backgrounds. As long as physicians are qualified and provide good care, it doesn't matter where they came from.

CRUSADER: ATTITUDES

How do you feel about the following statements?



CRUSADER respondents feel strongly that all should have equal access to quality care and find diversity important.

They are worried about the cost of care.

This segment is not exclusively defined by demographic characteristics.

The differences in demographic distribution are small—following are some of the notable differences:

- **24%** are 65+
  22% are 45-54
  22% are under 35 years of age
- **39%** $35,000-$74,999 annual HHI
  27% below $35,0000 annual HHI
- **63%** female
- **94%** have health insurance
  65% have used health care in the last month
- **78%** visit doctors for typical wellness checkups (more than other segments)
- **61%** typically visit a doctor or PCP office for non-emergency care
- **47%** are very loyal to their PCP
  21% are very loyal to a particular hospital
  21% to a particular clinic
  33% are very loyal to a particular hair stylist
- **25%** responsible for child
  10% responsible for elderly family member
- Some interest in alternative medicine:
  60% massage
  51% nutritional supplements
  43% meditation)
- **HIGH PERCENTAGE** believes many things (diet, smoking, exercise, drinking, wellness exams, etc.) affect a person's overall health "a lot"
- **49%** are very interested in a healthy lifestyle

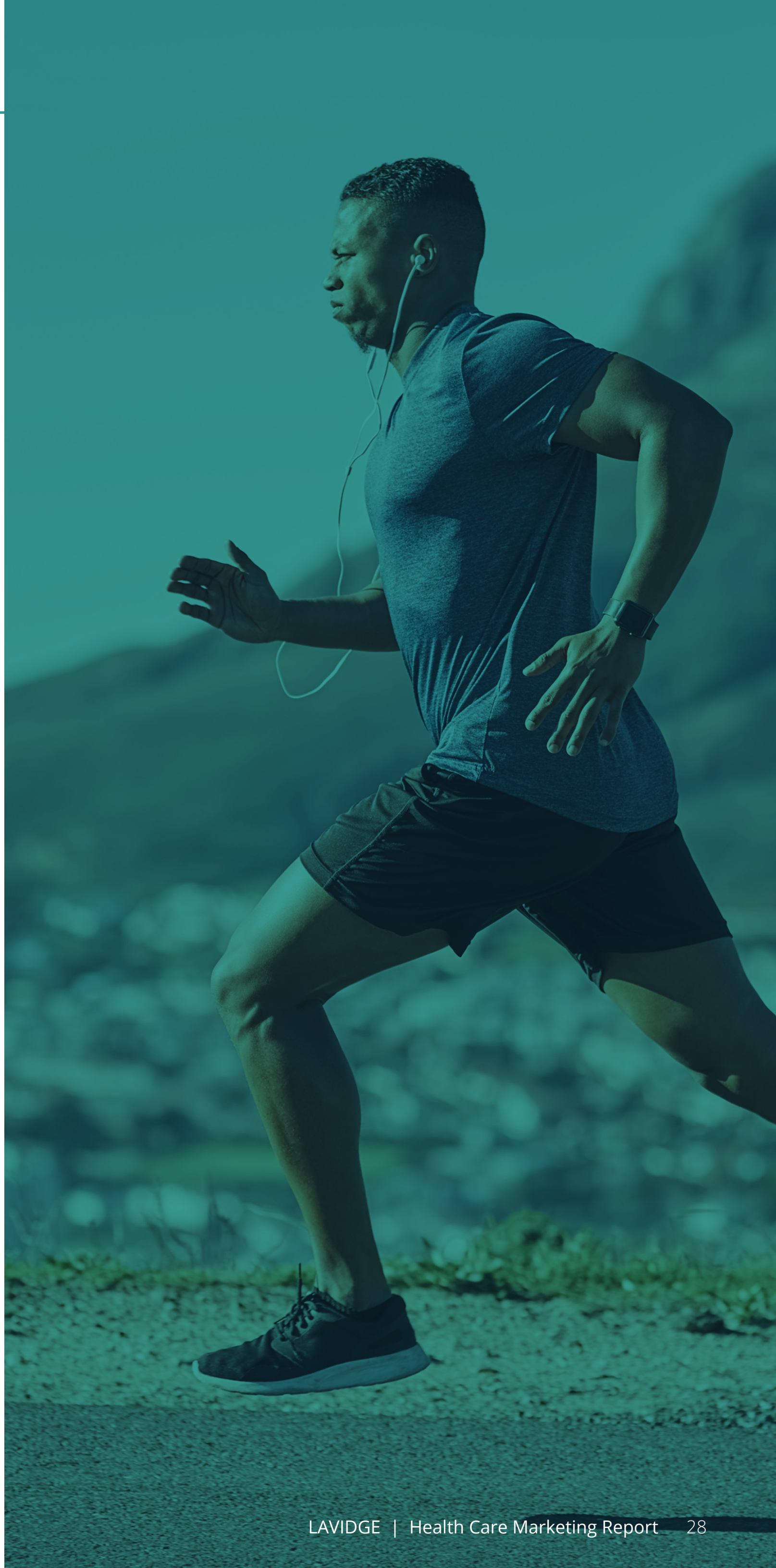
BOSS

BOSS: OVERVIEW

Boss respondents are more likely to do their own research about their health and bring treatment ideas to their doctor, will openly challenge their doctor's diagnosis if it doesn't feel right, and say they are often correct about their diagnosis before they see their doctor.

They feel that doctors treat symptoms—not the problem—and prefer non-drug approaches such as chiropractic, massage, acupuncture and nutritional supplements. They only want to see their own doctor when they need care and say that if they could avoid going to a doctor by getting regular exercise they would.

They believe patients should use the emergency room only if they have a life-threatening emergency.

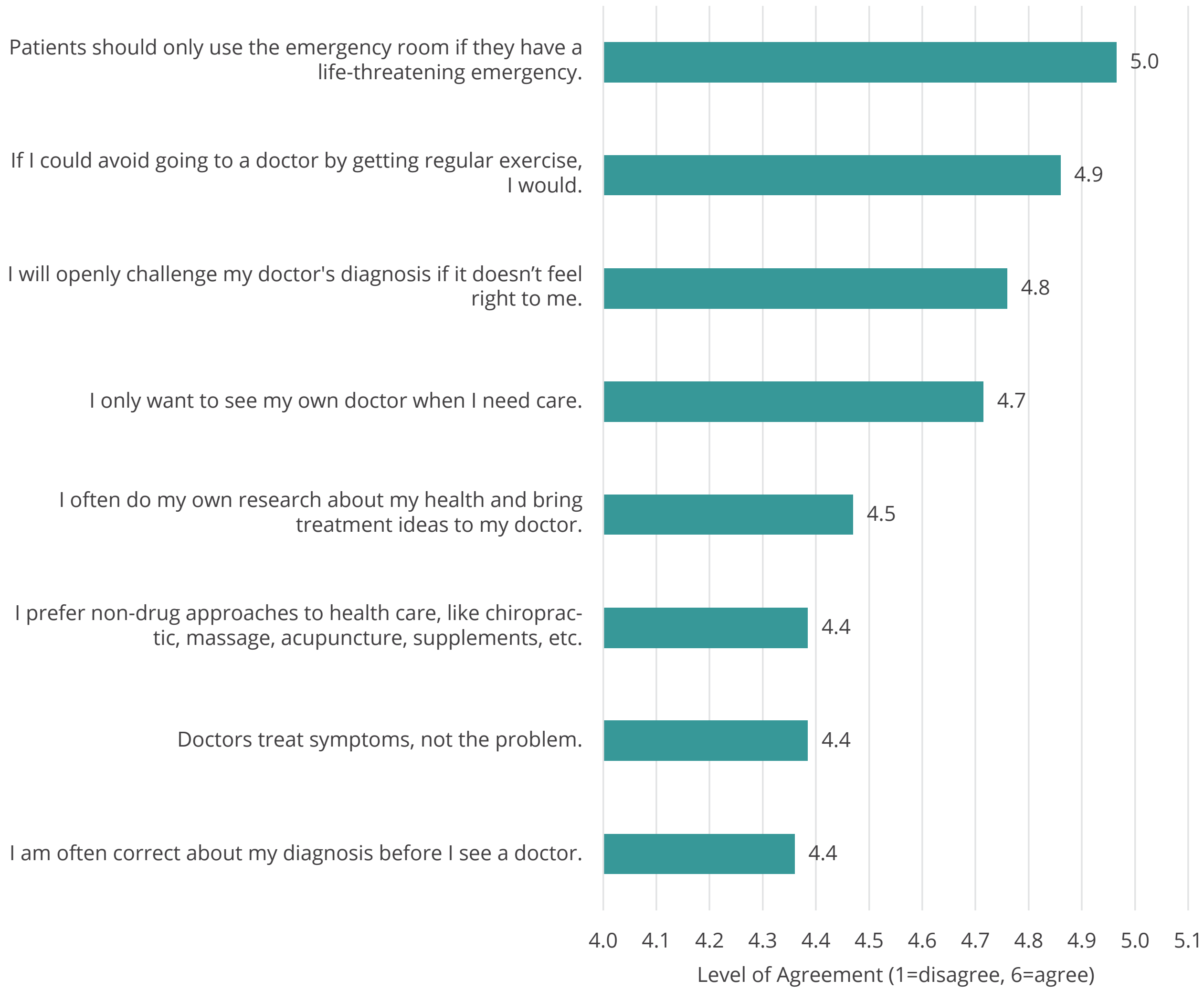


I'm really good about managing my own health care and don't often need a doctor to tell me if something is wrong. As a matter of fact, if I could completely avoid going to the doctor by simply getting regular exercise and watching my diet, I would.

If something isn't feeling right with my health, I'll listen to my body, do the research and typically self-diagnose the problem. And most times, I'm correct about the diagnosis even before seeing a doctor. That's why I try my best not to see the doctor. I feel like all they do is just treat the symptoms, not the problem. I know what's right for me and my health, and I don't typically need a doctor's opinion.

BOSS: ATTITUDES

How do you feel about the following statements?



BOSS respondents do their own research and are comfortable challenging their doctors.

They prefer alternative approaches to care.

BOSS: GENERAL CHARACTERISTICS

This segment is not exclusively defined by demographic characteristics.

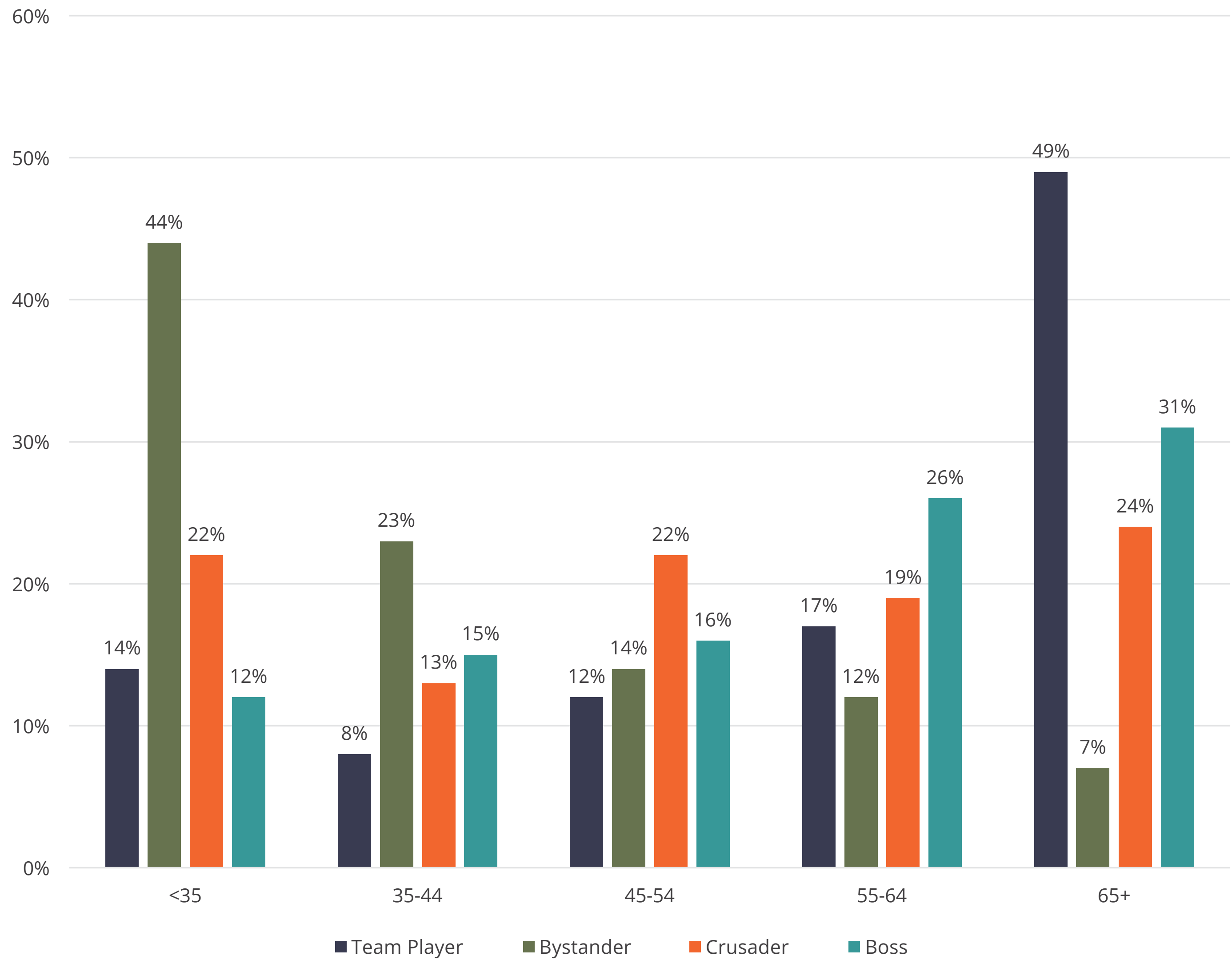
The differences in demographic distribution are small—following are some of the notable differences:

- **31%** are 65+
  26% are 55-64 years of age
- **39%** $35,000-$74,999
  33% $75,000-$149,999 annual HHI
- **64%** female
- **97%** have health insurance
  68% have used health care in the last month
- **76%** visit doctors for typical wellness checkups (more than other segments)
- **61%** typically visit a doctor or PCP office for non-emergency care
- **51%** are very loyal to their PCP
  20% are very loyal to a particular hospital
  21% to a particular clinic
  28% are very loyal to a particular hair stylist)
- **26%** responsible for a child
  13% responsible for an elderly family member
- Some interest in alternative medicine:
  55% massage
  53% nutritional supplements
  38% yoga
  36% meditation
- **HIGH PERCENTAGE** believes many things (diet, smoking, exercise, healthy teeth, etc.) affect a person's overall health "a lot"
- **51%** are very interested in a healthy lifestyle

What we learned about each segment

HIGH-LEVEL INSIGHTS FROM THE RESEARCH STUDY

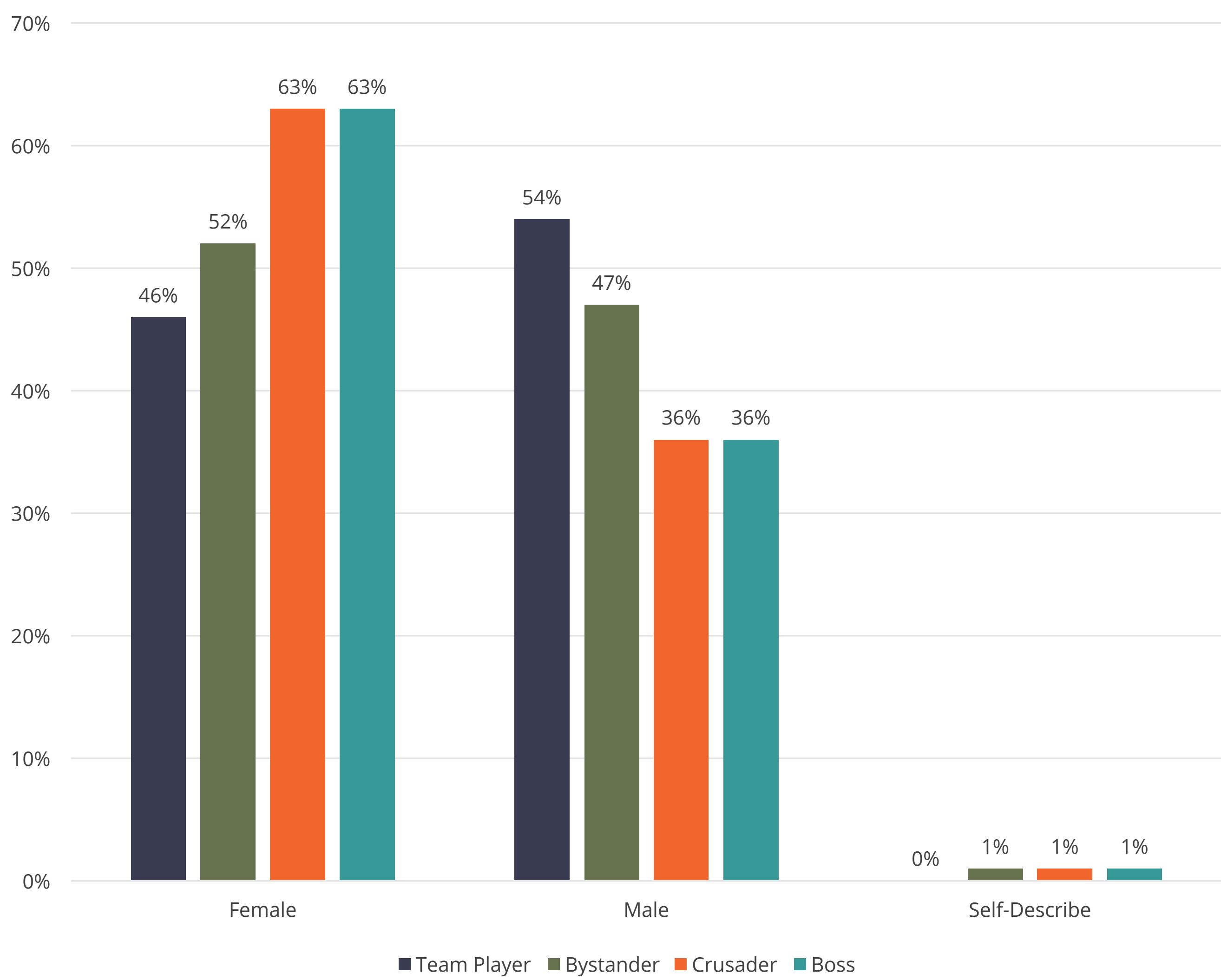
What is your age?



ALL SEGMENTS EXIST IN ALL AGE GROUPS.

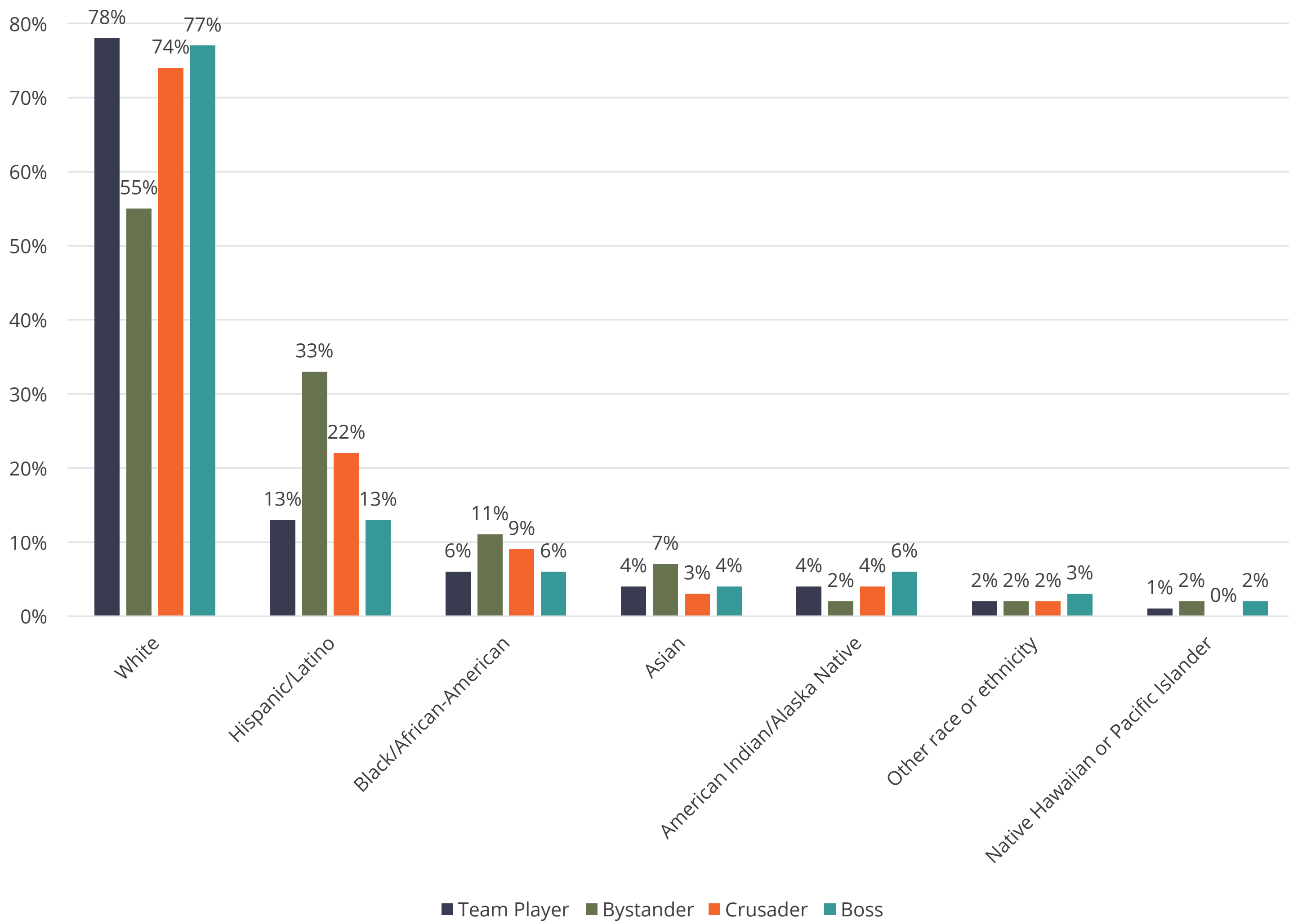
Team Players are more likely than other segments to be 65 or older, Bystanders to be under 35.

What is your gender?



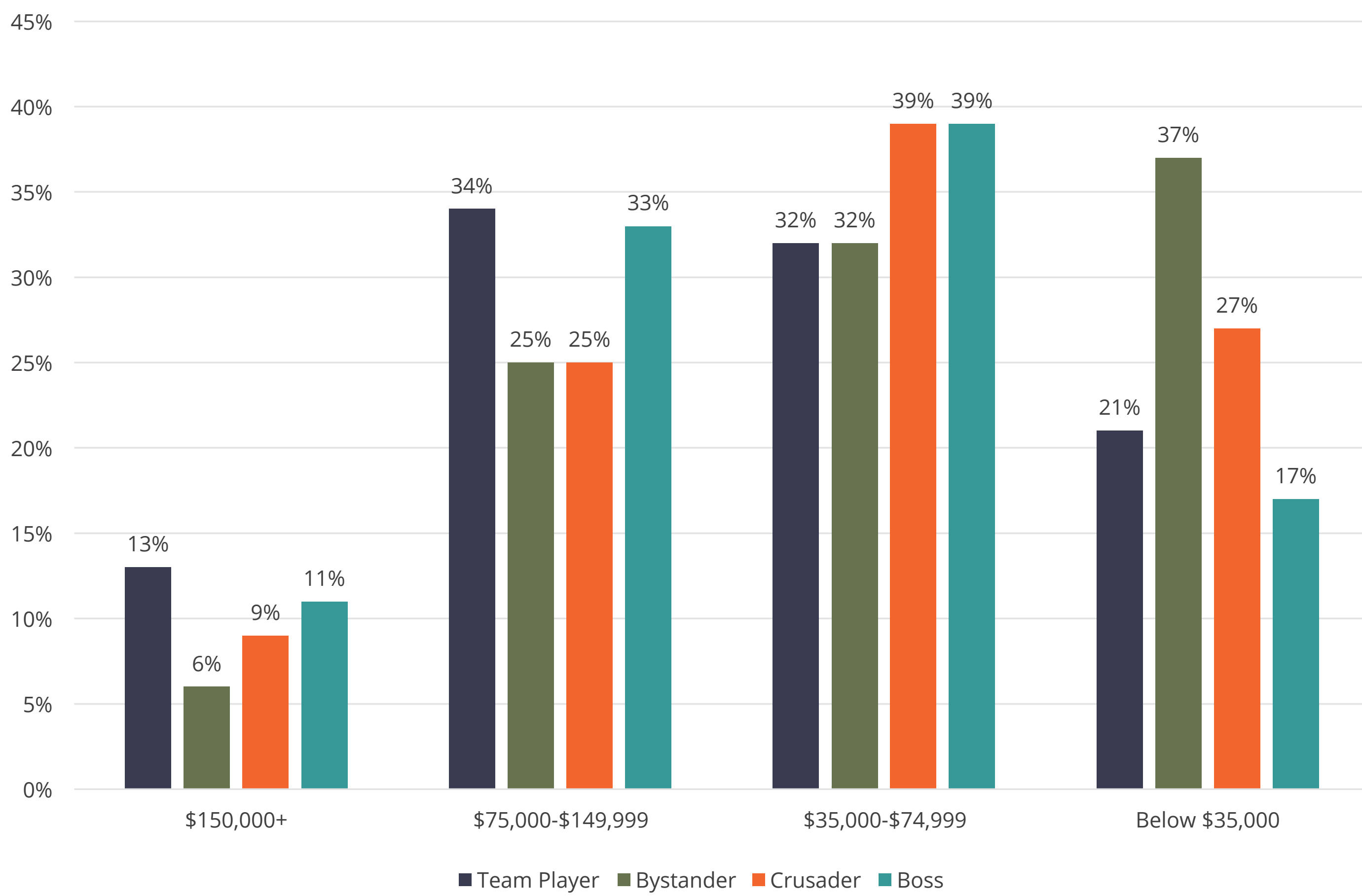
TEAM PLAYER RESPONDENTS ARE SOMEWHAT MORE LIKELY THAN OTHER SEGMENTS TO BE MEN.

What is your ethnicity?



BYSTANDER RESPONDENTS ARE NOTICEABLY LESS LIKELY TO BE WHITE, ALTHOUGH 55% OF THEM ARE.

What is your annual household income?



ALL SEGMENTS EXIST AT ALL INCOMES.

Bystander respondents are more likely to make under $35k annually, although many make more than $75K annually.

Lightbulb MOMENT

LAVIDGE

Attitudinal segmentation isn't about income, gender or race.

Employment and insurance coverage

42% of respondents say they work full time, with Bystander segment members most likely (**54%**) and Team Player least likely (**30%**).

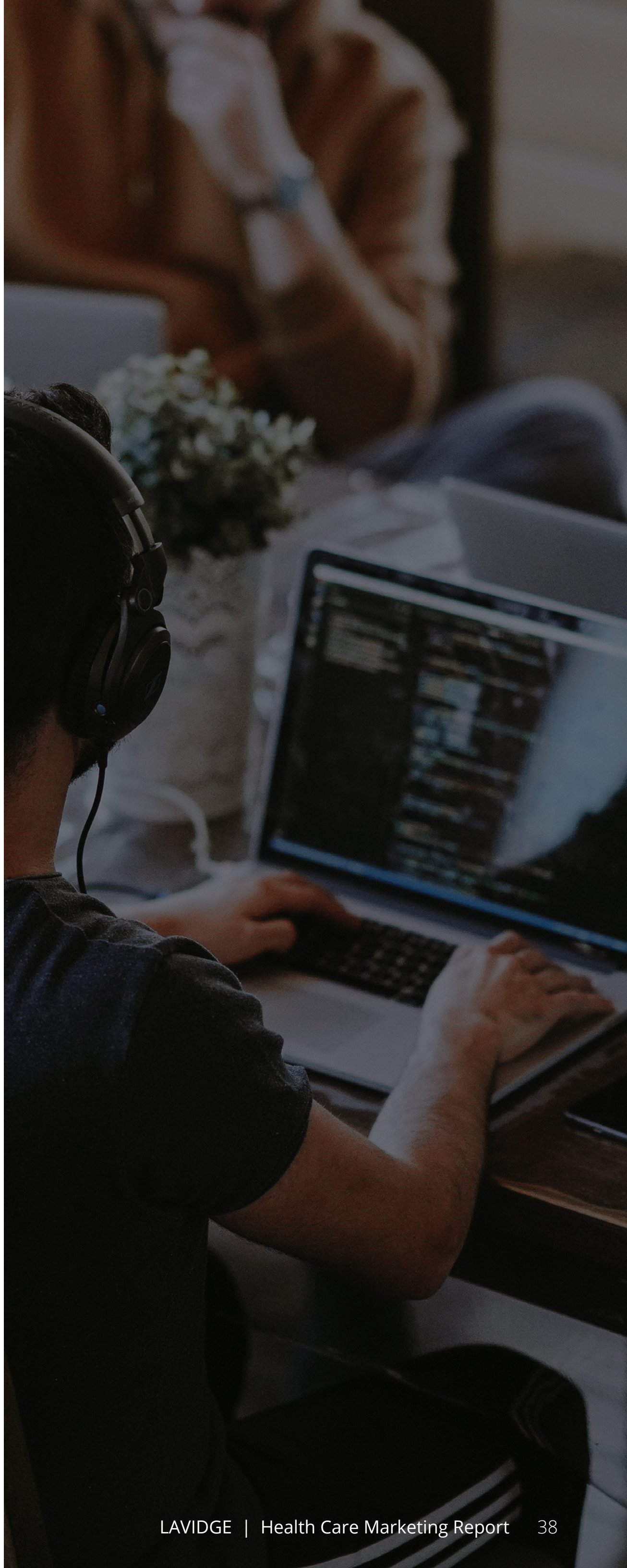
30% of respondents are retired, led by Team Player respondents (**49%**).

45% of Bystander respondents say they are responsible for a child's medical bills in addition to their own, compared to fewer than **25%** of other respondents. They are also more likely to be responsible for caring for elderly parents or family members (**27%** vs. less than **15%** of other segments).

95% of respondents say they have health insurance—from **90%** of Bystander to **100%** of Team Player respondents. **91%** with a family say their family members also have insurance.

48% of all respondents have insurance through their employer or a family member's, **18%** through Medicare and **14%** through private companies. **9%** say they are covered by an ACA plan.

21% of respondents say they have a Health Savings Account, and **55%** of those who don't say they know what an HSA is. Bystander respondents are the exception—while **31%** say they have an HSA, only **34%** of those who don't know what an HSA is.



Engagement with health care

High blood pressure was the most-frequently cited condition reported by respondents as affecting them or an immediate family member. Arthritis, depression, diabetes, and obesity all were cited by more than **20%** of respondents. Older respondents are more likely to experience high blood pressure and arthritis, while younger respondents are most likely to say they experience depression (36%).

Bystander respondents are by far the least likely to say they have visited their primary care or family doctor (**40%**), exercised outside of a gym (**36%**), had lab tests done (**21%**) or visited a medical specialist (**22%**) in the previous six months.

Team Player respondents are the most likely to have visited their doctor (**82%**) or a medical specialist (**44%**).

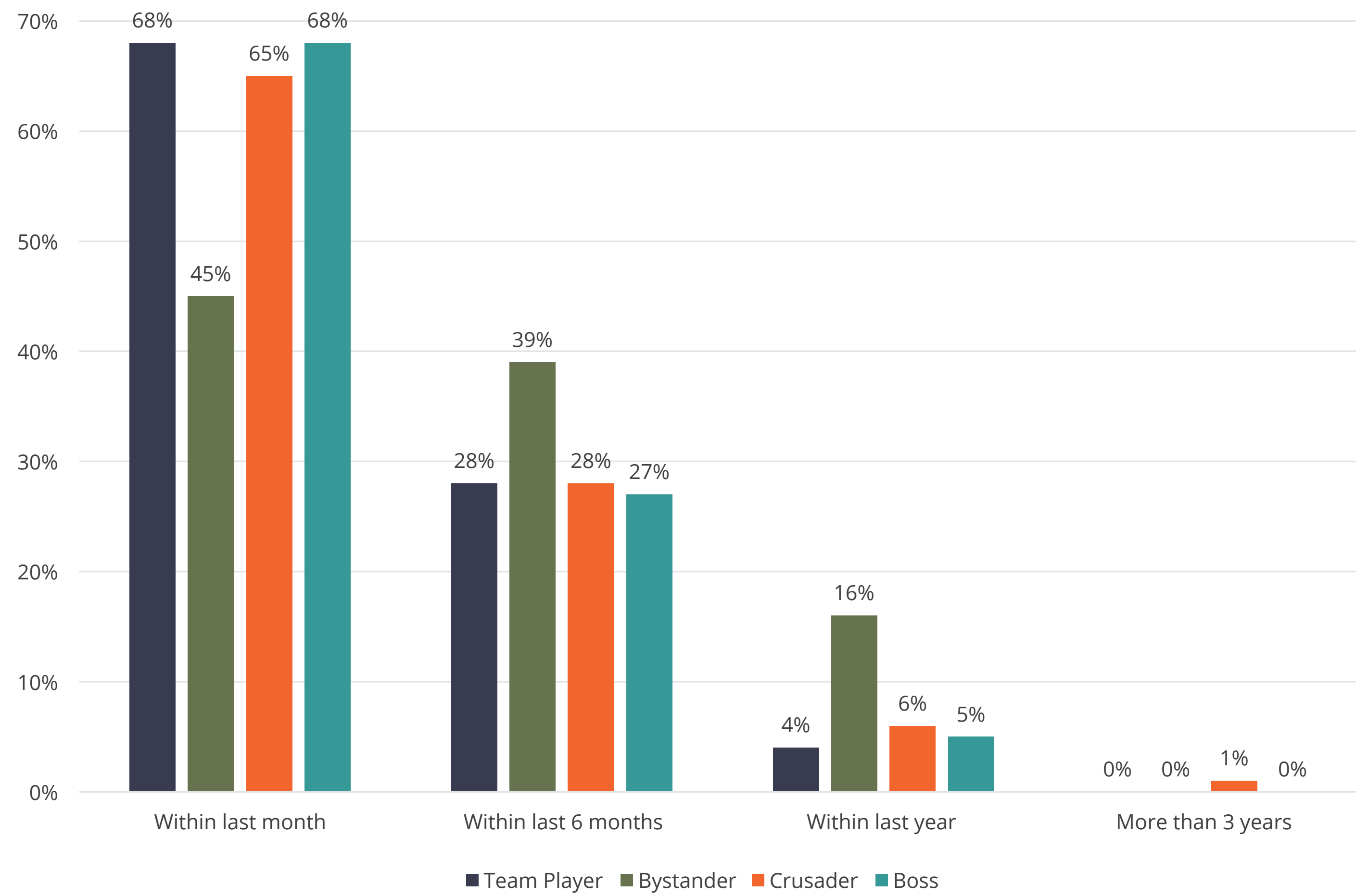
15% of respondents say they have visited an urgent care center and **13%** have visited an emergency room for their own care. 9% also report needing to see a doctor during the previous six months but choosing not to go due to the cost.

60% of all respondents say they've accessed health care services within the last month. Across all age groups, Bystander respondents are dramatically less likely to say they have accessed services within the last month. They are also less likely to see a doctor for any reason—regular checkups, when experiencing pain, or managing a chronic illness.

Team Player respondents are the most likely to have visited their doctor (82%) or a medical specialist (44%) in the last six months.

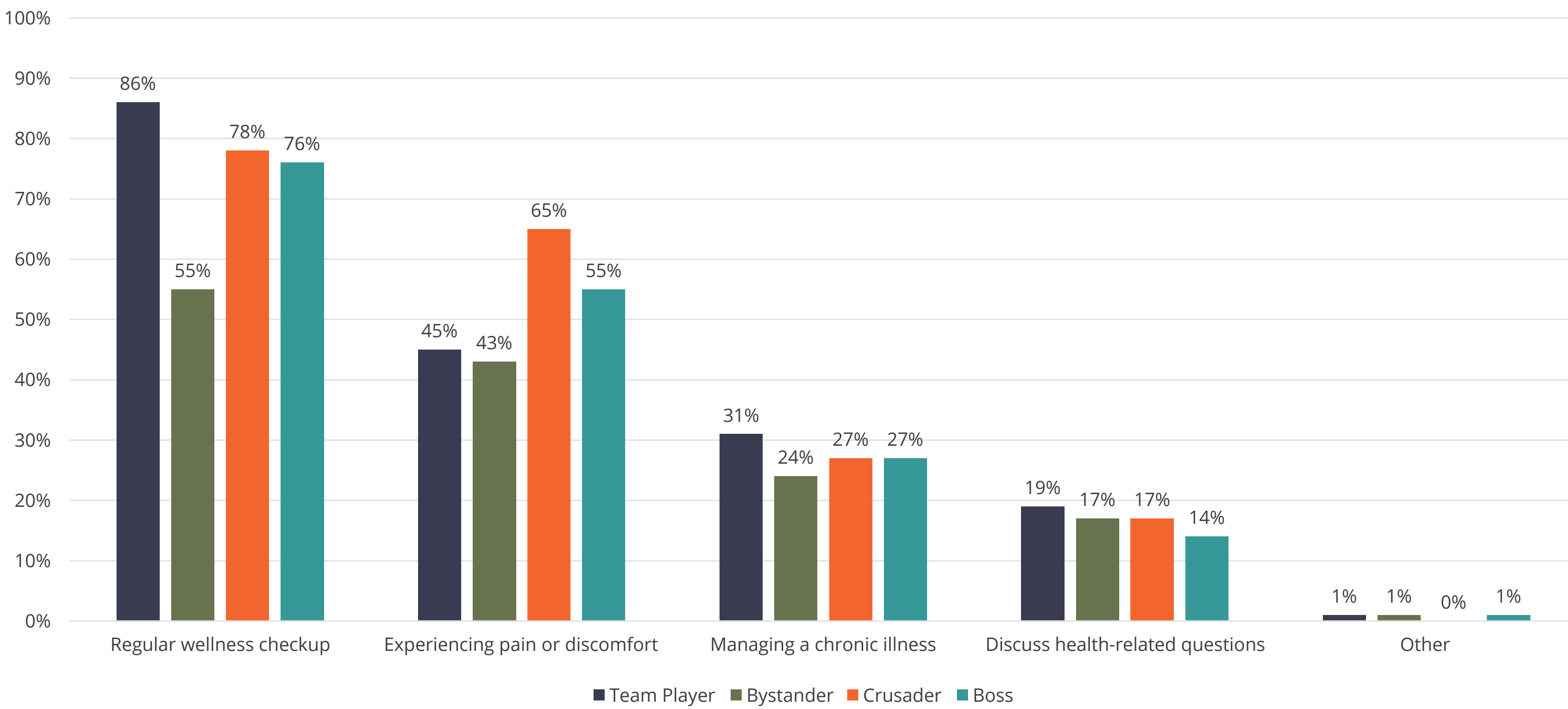
60% of all respondents say they've accessed health care services within the last month.

When was the last time you used health care (visited a doctor, clinic, hospital, filled prescription, got a vaccine, etc.)?



MOST RESPONDENTS HAVE USED HEALTH CARE IN THE LAST MONTH.
Bystander respondents are least likely.

When you make an appointment to see a doctor or dentist, what usually is the reason for the appointment?



MOST RESPONDENTS GET REGULAR CHECKUPS, BUT BYSTANDER SEGMENT MEMBERS ARE LESS LIKELY TO SEE A DOCTOR FOR ANY REASON.

Lightbulb MOMENT

LAVIDGE

Having health insurance and using health care aren't the same thing.

Nearly all respondents have insurance, but some access health care far less often.

Health care costs

35% of respondents “always” and **30%** “usually” pay attention to provider charges for visits, treatment, tests, and procedures. Boss segment members are more likely, at **75%** in total.

60% of respondents say they pay attention to costs to see how much their insurance is covering, and **32%** say they need to determine if they can afford the treatment.

23% of those who say they pay attention to cost say it’s to compare the pricing of various providers for the same procedures. **9%** say they always shop around for the best cost, and **15%** say they usually do. Bystander respondents are more likely—**16%** say they always do, **23%** usually, and **38%** sometimes.

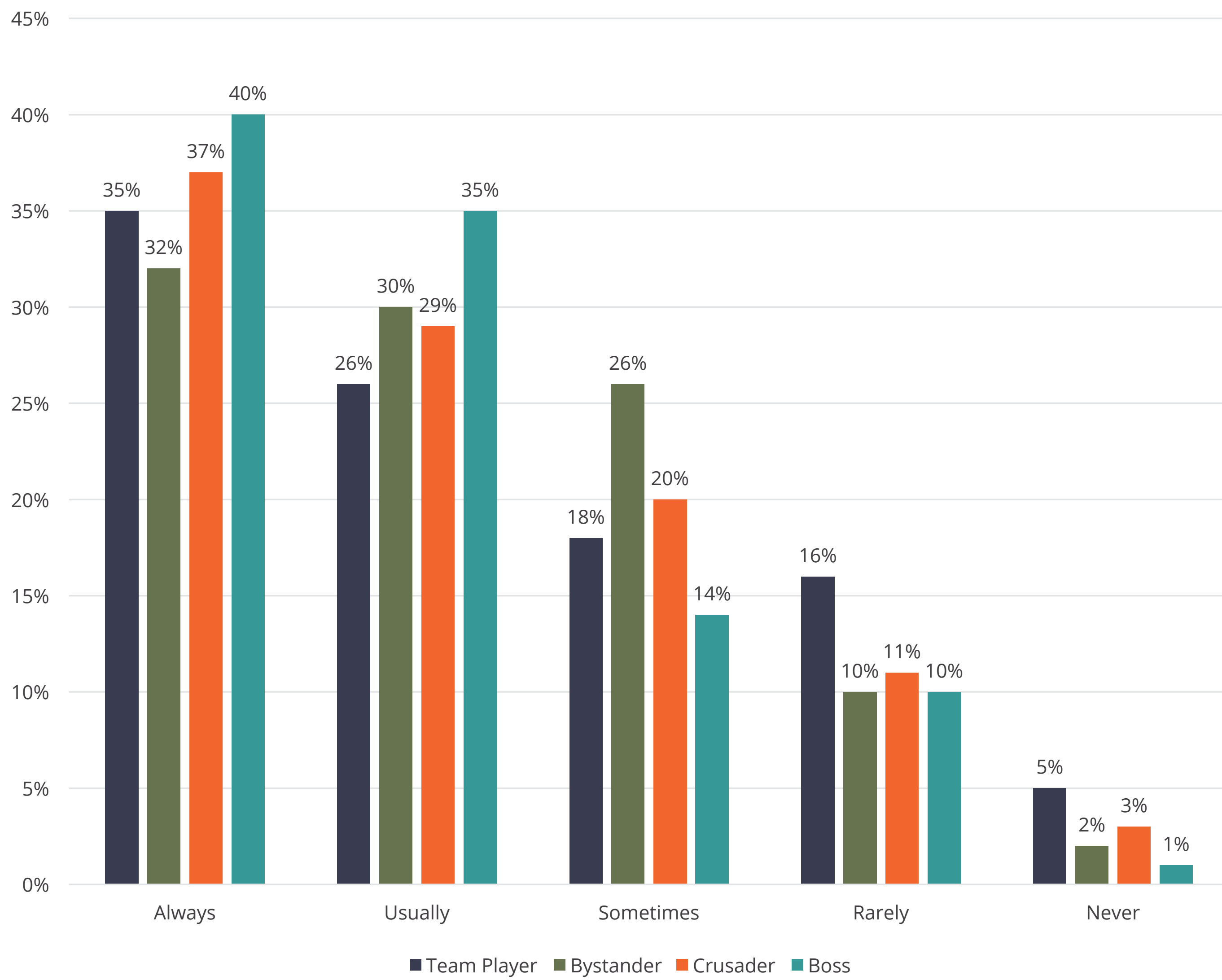
60%

of respondents say they pay attention to costs to see how much their insurance is covering

32%

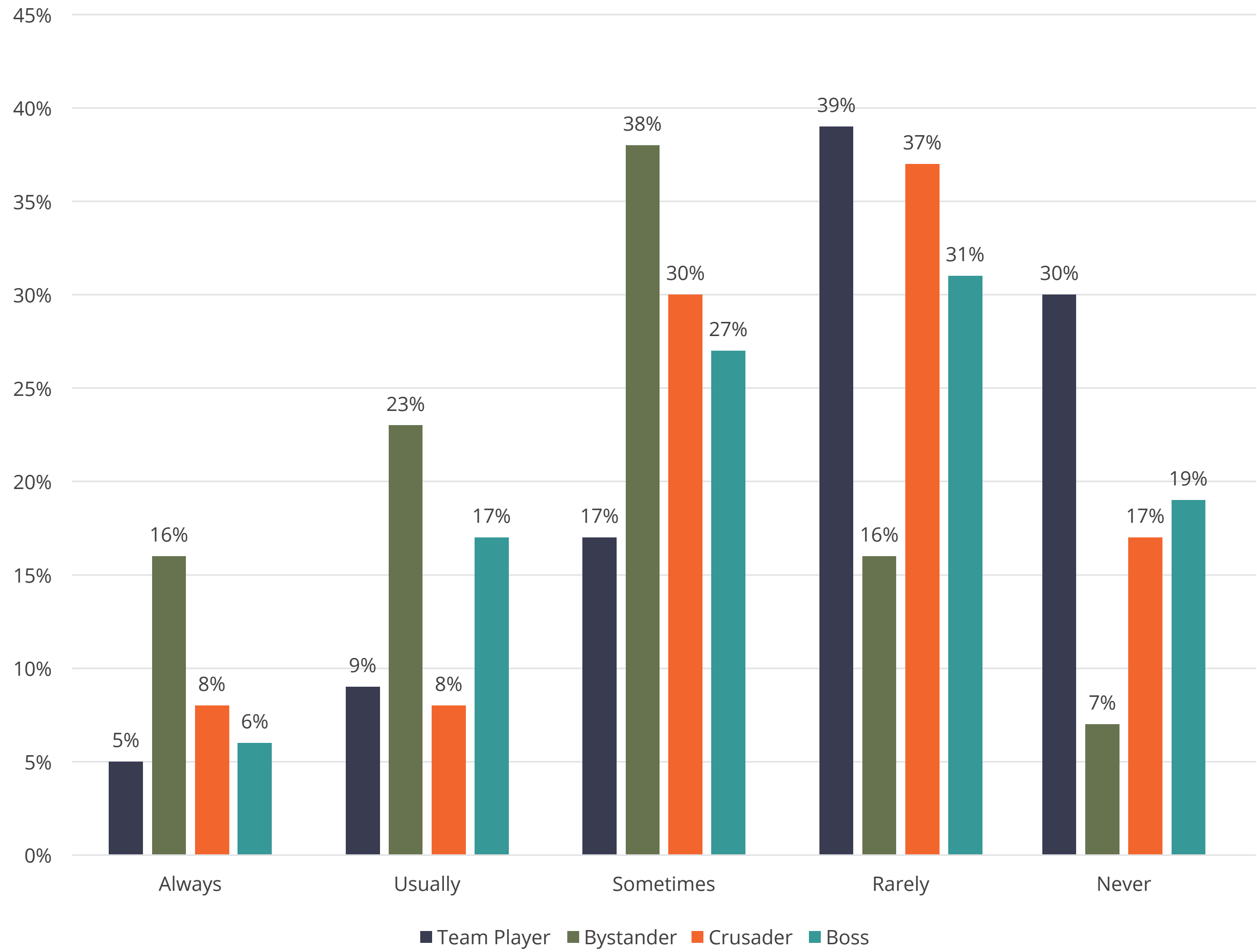
say they need to determine if they can afford the treatment.

Do you pay attention to how much health care providers charge for visits, treatments, tests or procedures?



THE MAJORITY OF RESPONDENTS SAY THEY USUALLY OR ALWAYS PAY ATTENTION TO HOW MUCH PROVIDERS ARE CHARGING.

Do you "shop around" to find the best cost when seeking health care?



BYSTANDER RESPONDENTS ARE THE MOST LIKELY TO SAY THEY TYPICALLY SHOP AROUND TO FIND THE BEST COST.

Lightbulb MOMENT

LAVIDGE

Paying attention to fees is widespread, even among those who have insurance.

Facility ownership

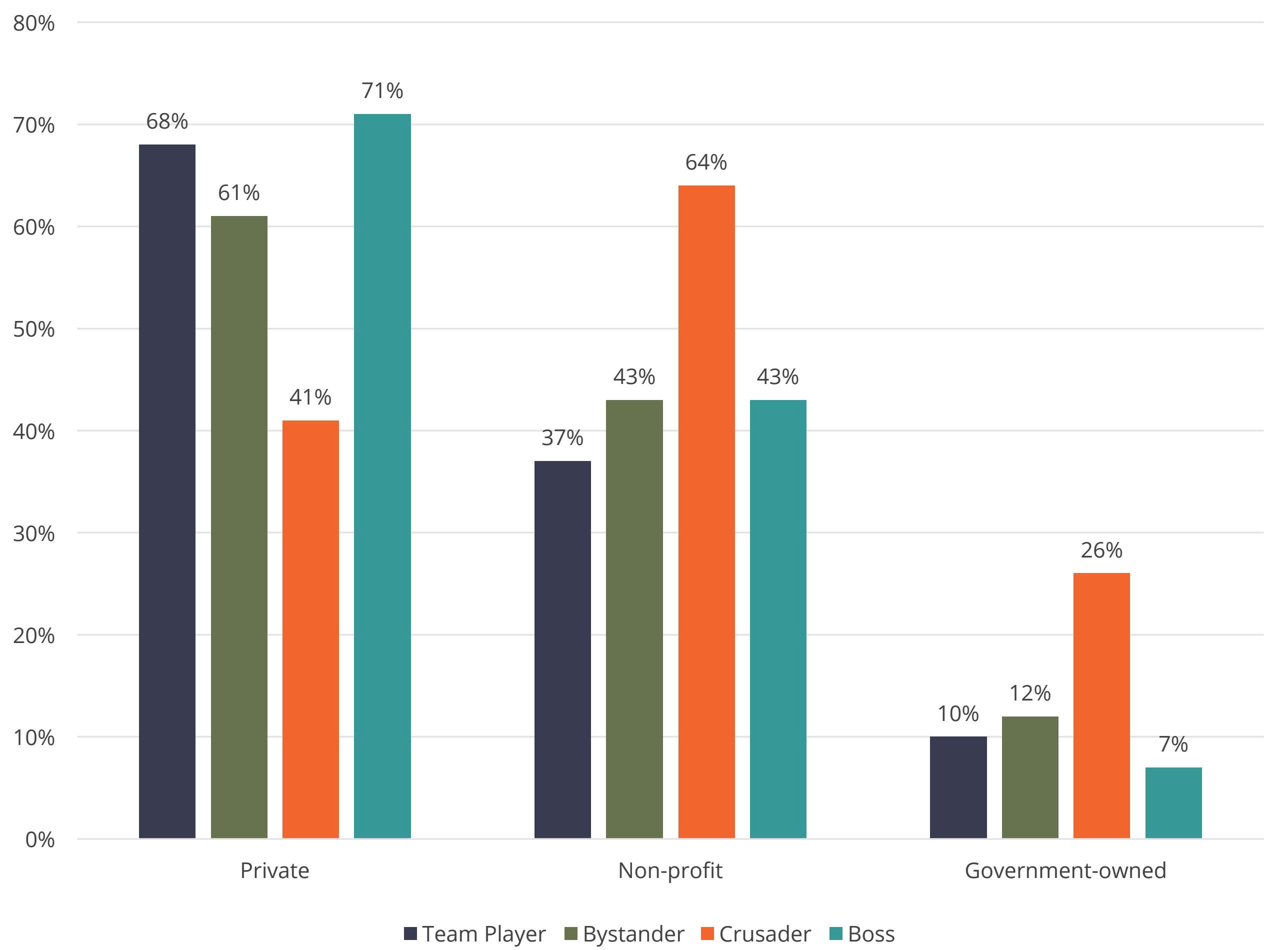
More than **60%** of Team Player, Crusader and Boss respondents say they would prefer to go to their primary care or family doctor's office if they were sick and needed non-emergency care. But only **26%** of Bystander respondents say the same, with the majority preferring to use the local hospital, clinic, emergency room, or even the house of a friend or relative.

While **44%** of respondents say it doesn't matter at all whether a health care facility is private, non-profit or government-owned/operated, **18%** say it matters a lot. Bystander respondents are the most likely to see this as an important consideration when choosing where to go for care.

Among those with a preference, most prefer private ownership, although Crusader respondents are much more likely to prefer non-profit (**64%**) over private (**41%**). They are also more likely than other segments to prefer government-owned/operated (**26%**).

While 44% of respondents say it doesn't matter at all whether a health care facility is private, non-profit or government-owned/operated, 18% say it matters a lot.

What type of facility do you prefer?



THOSE WITH A PREFERENCE ARE MOST LIKELY TO PREFER PRIVATE FACILITIES, ALTHOUGH CRUSADER RESPONDENTS PREFER NON-PROFIT.

Facility choice

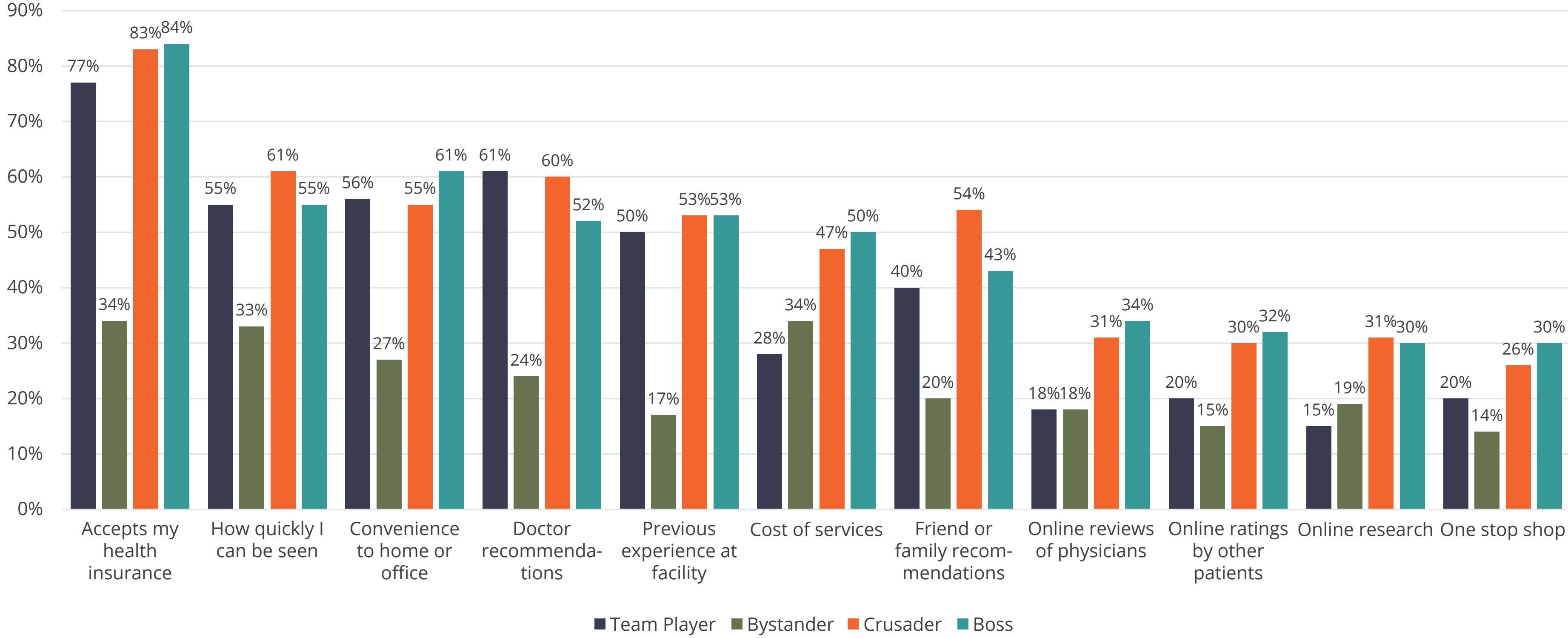
Many factors go into choosing a health care facility for respondents. **67%** cite whether a facility accepts their health insurance, the most common answer. **50%** cite how quickly they can be seen, and **48%** how convenient the facility is to their home or work and whether their doctor has recommended the facility. The cost of services is cited by **39%** of respondents, with social media recommendations and various forms of advertising cited by fewer than **10%** of respondents.

Bystander respondents are far less likely to cite any of these considerations on their choice of a facility—likely because they are less likely to think about choosing a facility or choosing to go. The younger respondents in the survey are far less likely than older respondents to cite most considerations.

67%

of respondents say whether their health insurance is accepted is an important factor in choosing a facility.

If you were choosing a health care facility for your own care, which of the following would most influence your decision?



ACCEPTING INSURANCE, SPEED OF APPOINTMENTS, CONVENIENCE OR A DOCTOR'S RECOMMENDATION ARE KEY DRIVERS FOR CHOOSING A FACILITY.

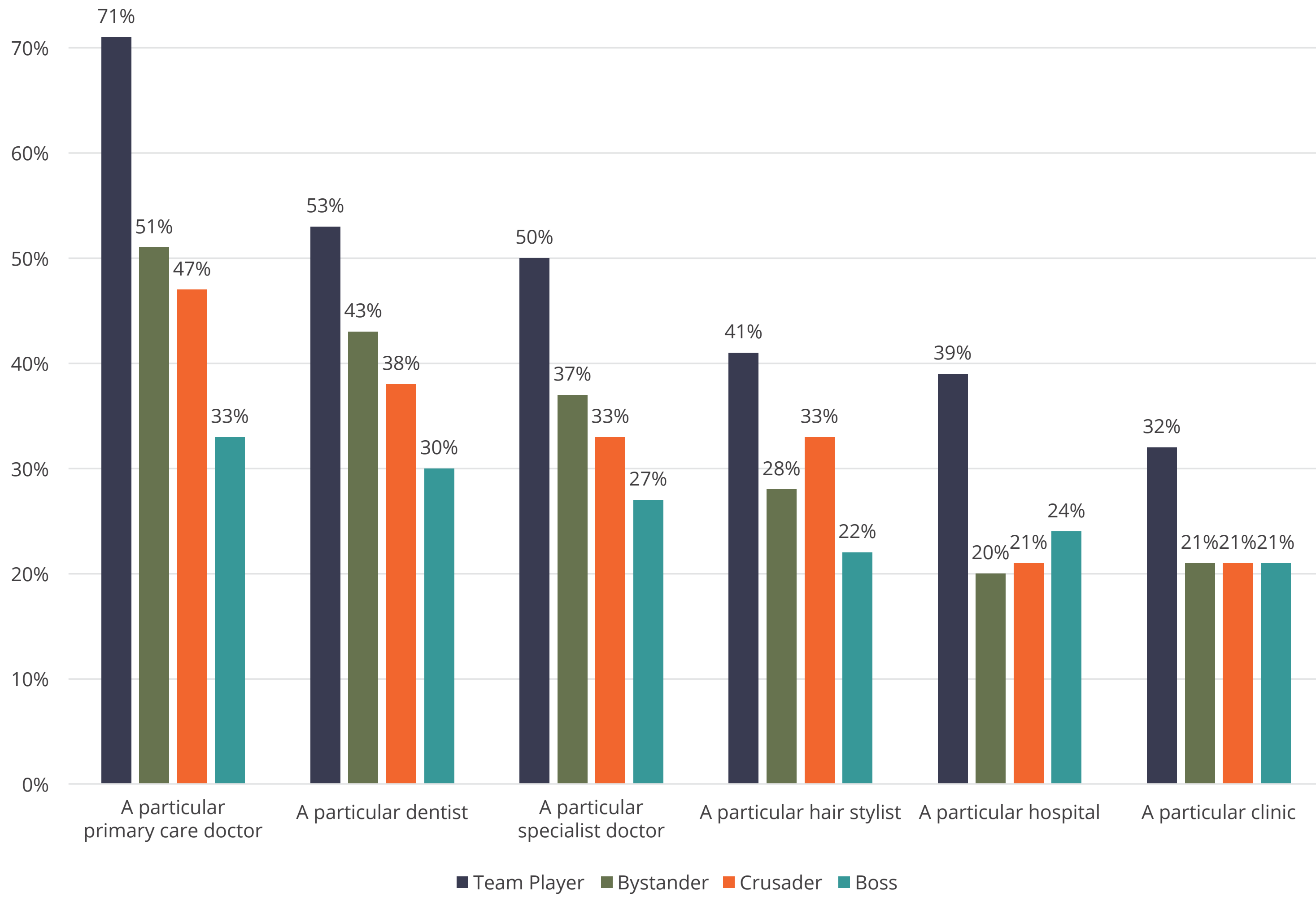
Facility ownership isn’t driving choice.

Insurance status, speed of being seen,
and convenience are key.

Health care loyalty

Respondents were asked how loyal they are when it comes to a variety of medical providers and facilities. While **50%** overall say they're very loyal to their primary care doctor, only **26%** say the same about a hospital, and **24%** about a clinic—lower loyalty ratings than they give their hair stylist (**31%**).

How loyal are you when it comes to the following?



PRIMARY CARE PHYSICIANS GENERATE THE MOST LOYALTY AMONG THE RESPONDENTS.

Team Player respondents are more likely to be very loyal.

Lightbulb MOMENT

LAVIDGE

Loyalty to health care facilities is lower than loyalty to doctors—or hair stylists.

Alternative medicine

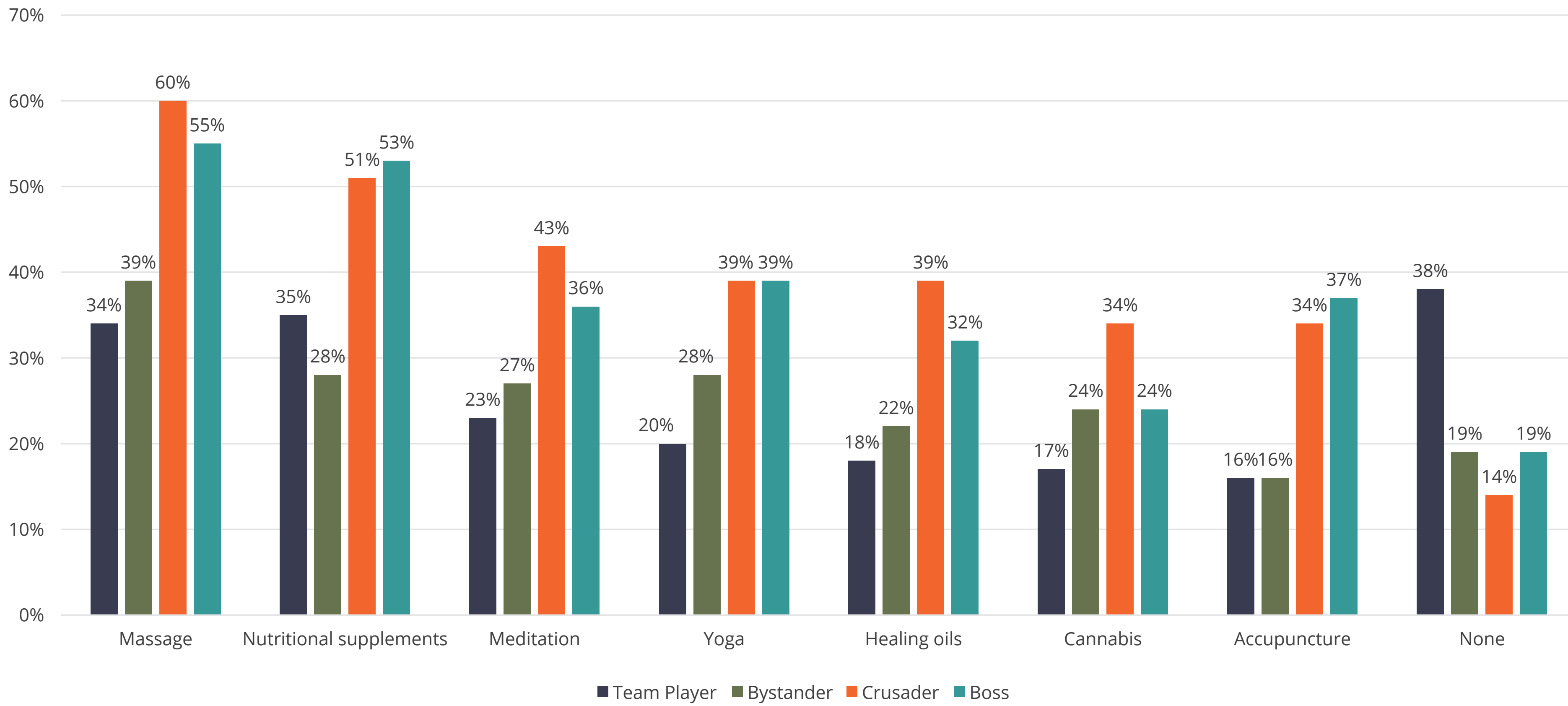
Many respondents express an interest in "integrative" or "complementary alternative" medical approaches. **46%** are interested in massage, **41%** in nutritional supplements, and **32%** in medication. **22%** say they're not interested in any of the approaches we listed.

Crusader and Boss respondents are the most interested in every approach—Team Players are the least interested, with the exception of nutritional supplements which are of least interest to Bystander respondents. **38%** of Team Player respondents say they have no interest in any of the listed approaches.

These segment differences exist even within age and gender groups, in most cases, suggesting that interest isn't fundamentally about these demographics, but more about the attitudes affecting consumers and their health care decisions.

Many respondents express an interest in "integrative" or "complementary alternative" medical approaches.

Some health programs offer “integrative” or “complementary alternative” medicine—non-drug approaches to healing. Are you interested in any of these approaches?



INTEREST IN ALTERNATIVE APPROACHES IS MUCH GREATER AMONG CRUSADER AND BOSS SEGMENT MEMBERS.

Lightbulb MOMENT

LAVIDGE

Interest in alternative medicine varies substantially.

But it’s about attitude, not age or gender.

Understanding major health impacts

Respondents were asked the extent to which various activities (smoking, getting regular exercise, having a pet) affect a person's overall health.

- *The majority of respondents say that the following affect overall health "a lot":*
  - *Healthy diet 75%*
  - *Smoking (74%)*
  - *Regular exercise (71%)*
  - *Healthy teeth (69%)*
  - *Regularly scheduled wellness visits (59%)*
  - *Drinking alcohol (52%)*

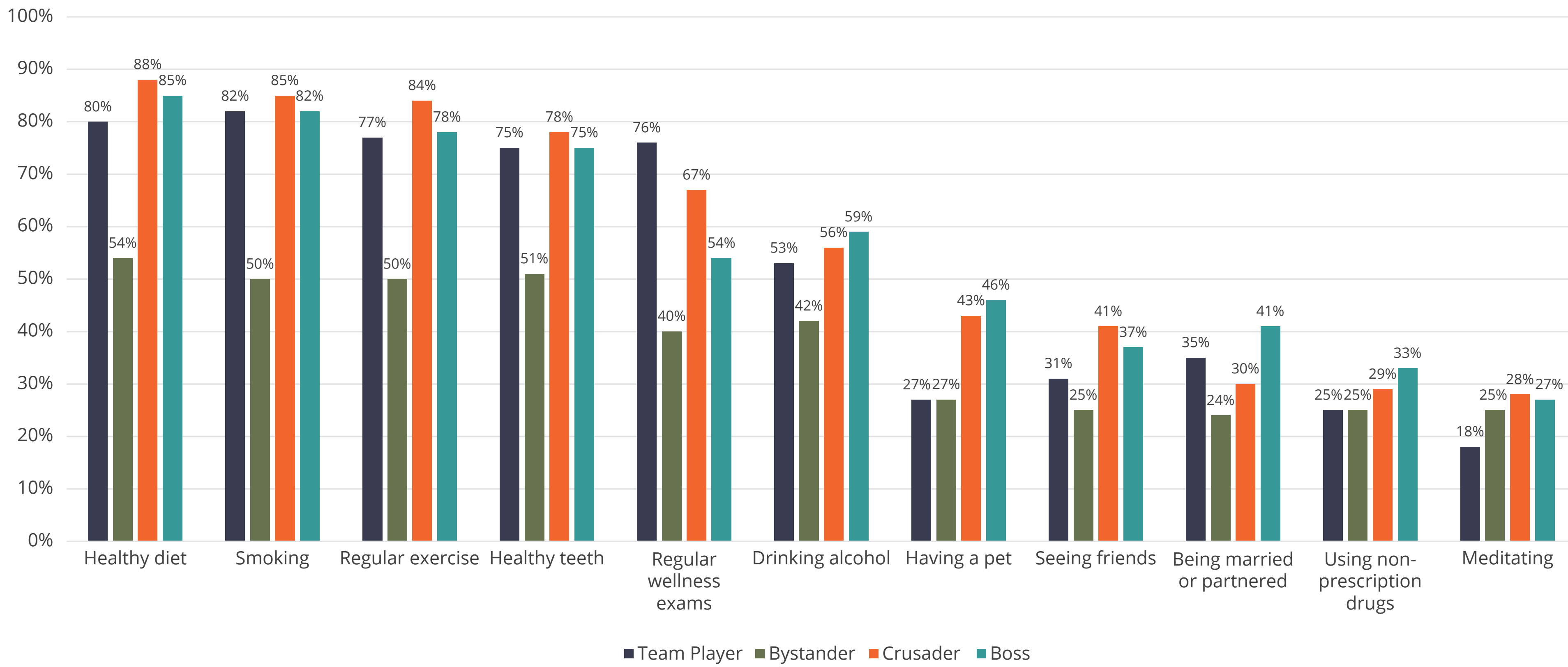
But Bystander respondents are in all these cases substantially less likely than other respondents to say that the health effect is substantial:

- *Healthy diet (54%)*
- *Smoking (50%)*
- *Regular exercise (50%)*
- *Healthy teeth (51%)*
- *Regularly scheduled wellness visits (40%)*
- *Drinking alcohol (42%)*

Other factors such as having a pet, seeing friends, being married or partnered, using non-prescription drugs, and meditating are more likely to be seen as having small rather than major impact on overall health.

These perceptions hold true by segment even within age and gender groups—showing that it's not primarily the younger respondents in denial, or the oldest, or the men or the women—but those with Bystander attitudes.

To what extent do you think the following affect a person's overall health?



MOST RECOGNIZE THE HEALTH IMPACT OF A HEALTHY DIET, SMOKING, EXERCISE, ETC.

Bystander respondents are less likely to say they have a major effect.

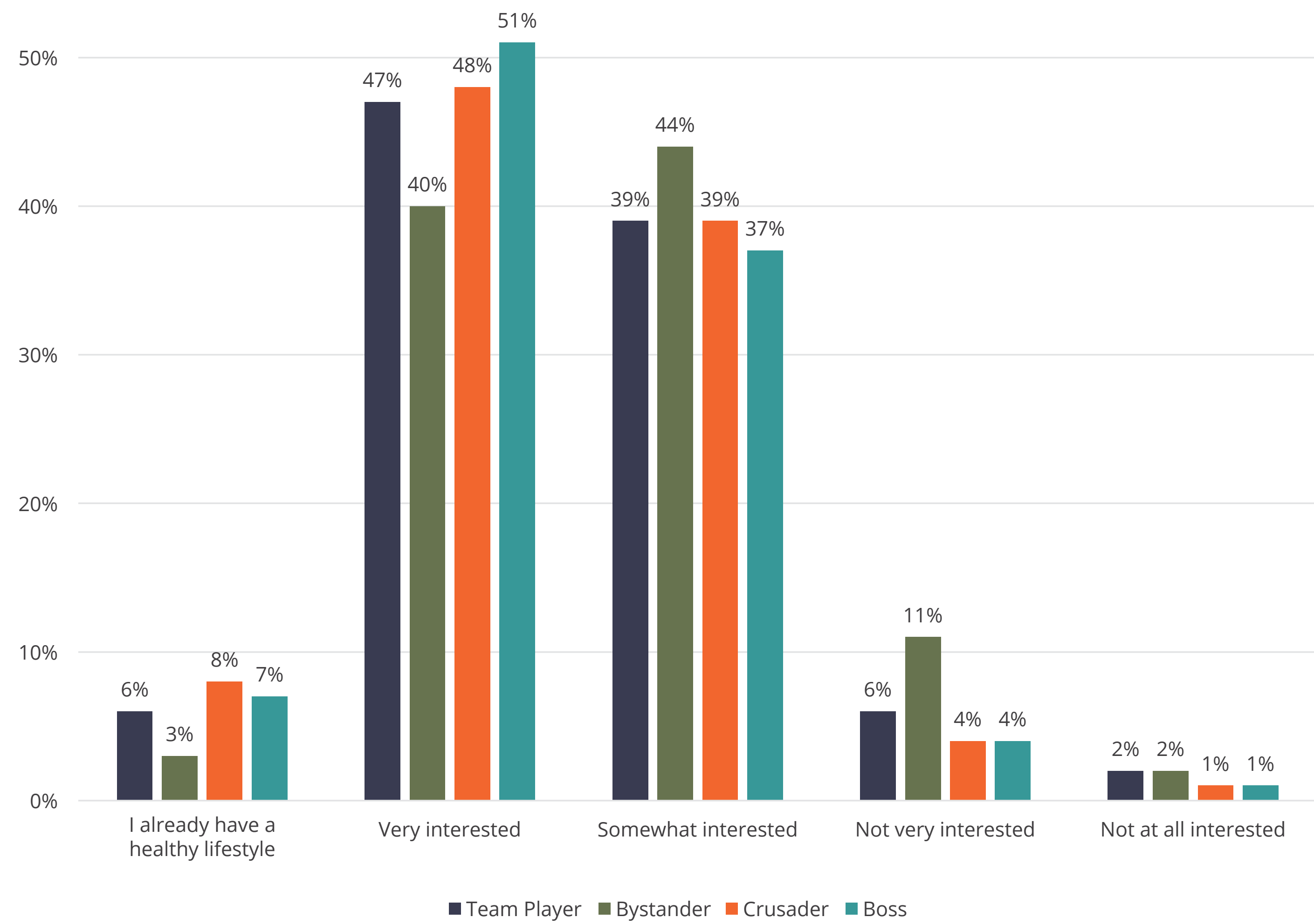
Healthy lifestyle

Only **6%** of respondents in the survey say they currently have a healthy lifestyle. Of those who don't, the majority want to adopt one—**46%** overall are very interested, and **40%** are somewhat interested. All segments are fairly comparably represented.

For older respondents, interest is spurred by increasing age (over **70%** among those 45 or older). **21%** of respondents say they are worried about environmental impacts on their health, and **20%** say they have a condition that could be improved by a healthier lifestyle.

Only 6% of respondents in the survey say they currently have a healthy lifestyle.

How interested are you in adopting a healthy lifestyle?



MANY RESPONDENTS ARE INTERESTED IN A HEALTHY LIFESTYLE.

Interest in a healthy lifestyle is common.

But understanding of what that means varies substantially.

Amended research

Relevant insights from amended research regarding COVID-19

COVID-19 amendment: overview

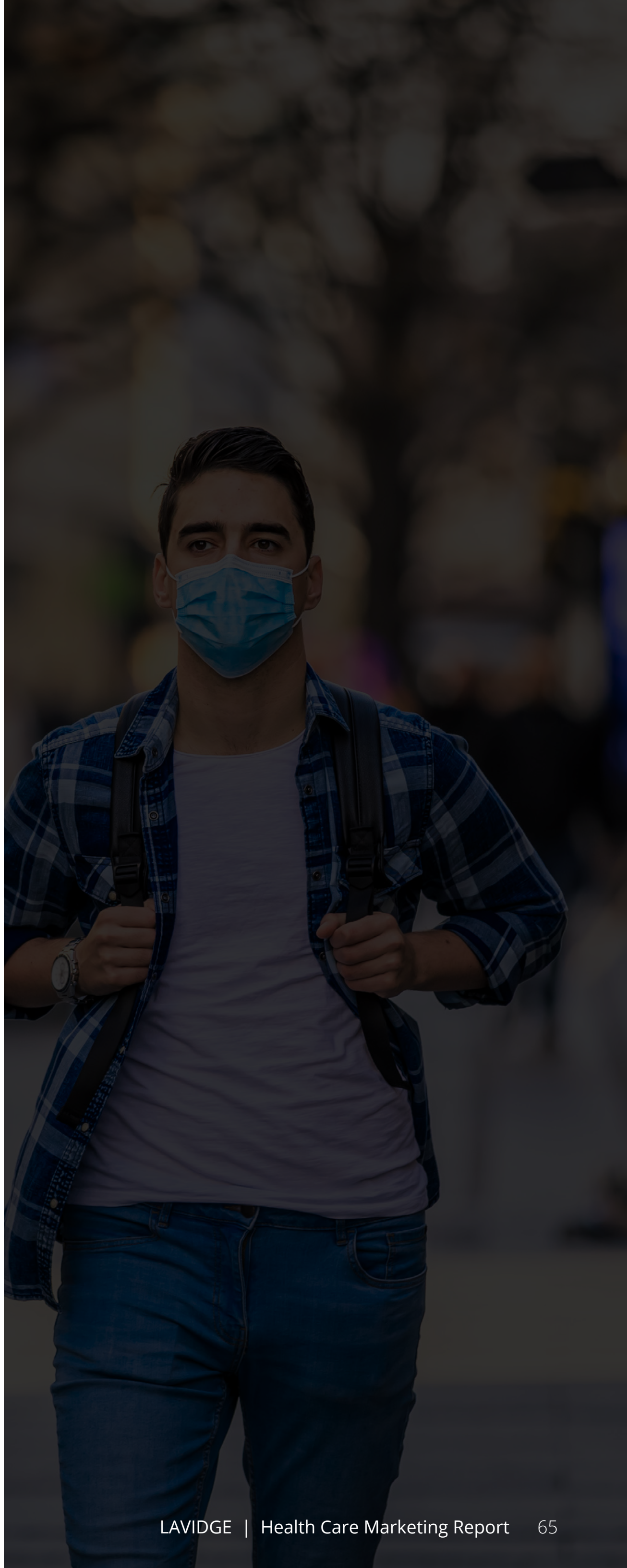
As the global pandemic was reaching its peak, we asked 500 of our original survey participants to answer some additional questions related specifically to COVID-19. Our goal was to learn how attitudes have changed both overall and for the segments we've identified.

Heightened health awareness

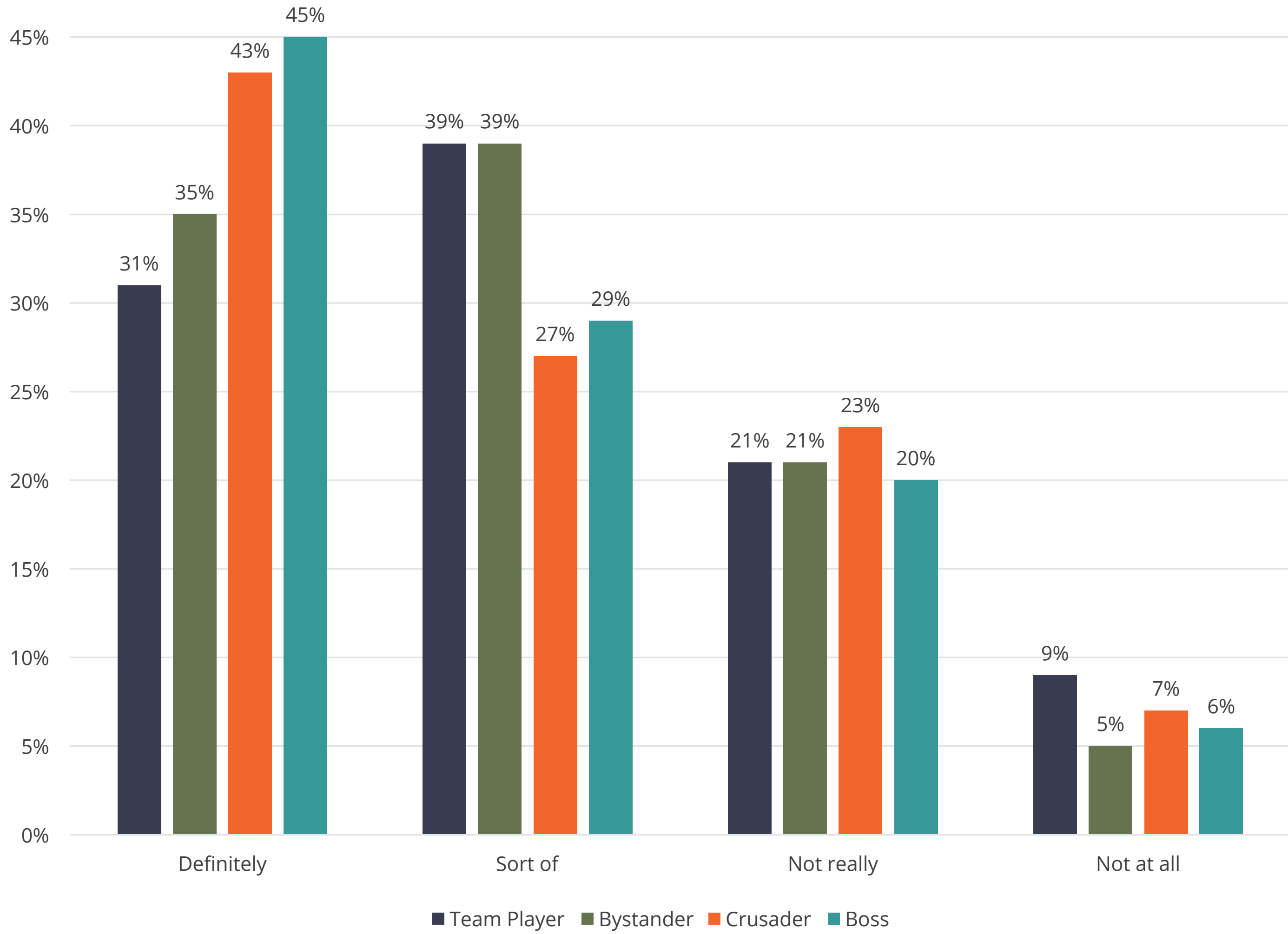
The majority of respondents report an increased awareness of health conditions that could put them at risk of serious illness from COVID-19. Boss respondents were most aware (**45%** definitely aware) while Team Players were less aware (**31%** definitely aware).

67% of respondents say they have considered changing behaviors to improve their health based on the COVID-19 pandemic. The Boss respondents were most likely to change behaviors (**30%** definitely) while the other segments were less likely to change behaviors (Team Player **24%**, Bystander **23%**, Crusader **25%**).

Regardless of the segment, most respondents agree their lives will be different to some degree than before the pandemic.

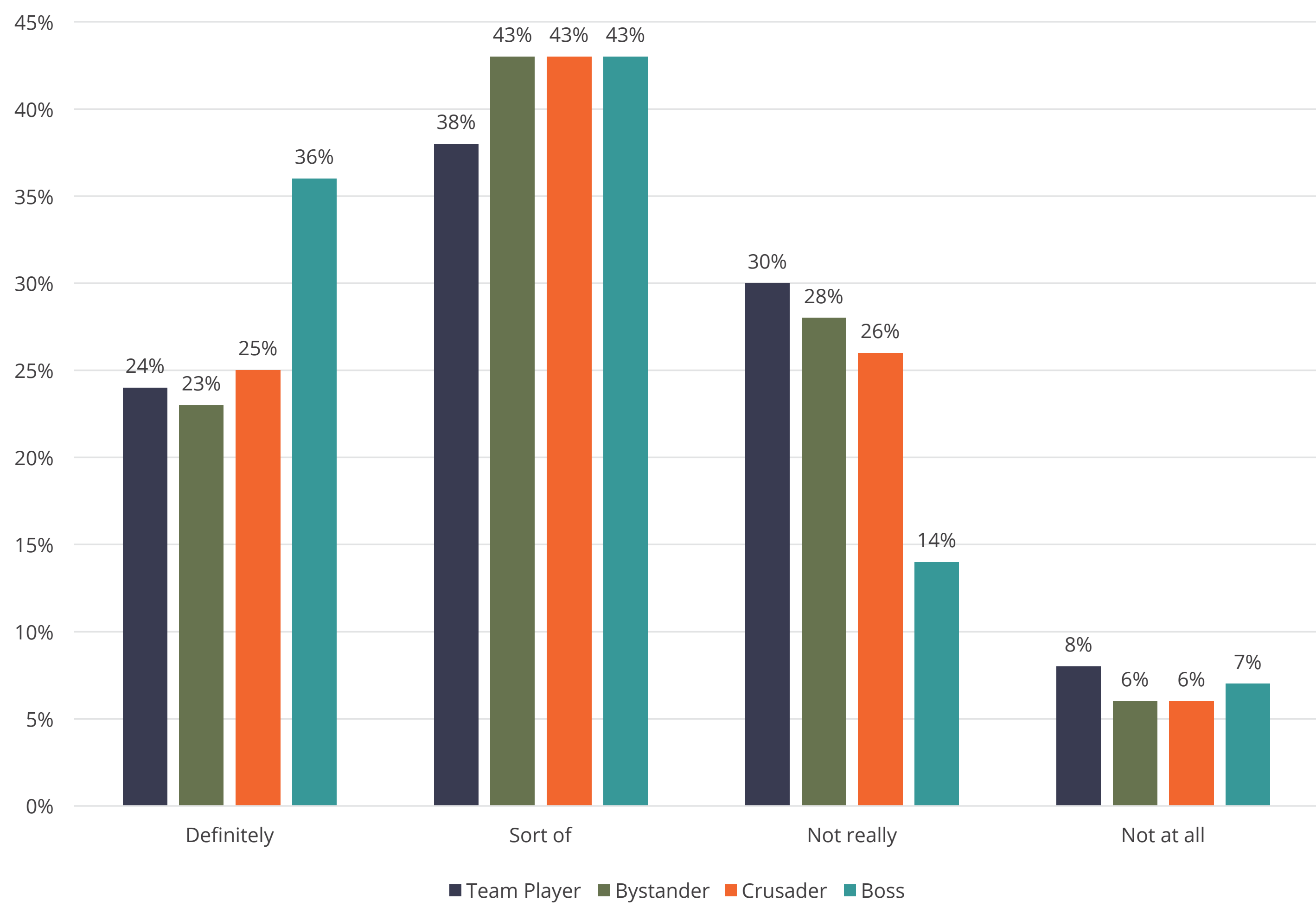


Has the COVID-19 pandemic made you more aware of health conditions that could put you at greater risk of serious illness if you contract the virus?



A MAJORITY OF RESPONDENTS REPORT AN INCREASED AWARENESS
of health conditions that could put them at risk of serious illness from COVID-19.

Has the COVID-19 pandemic made you consider changing behaviors to improve your health?



67% OF RESPONDENTS SAY THEY HAVE CONSIDERED CHANGING BEHAVIORS
to improve their health based on the COVID-19 pandemic.

Getting back to normal

29% of respondents say they would be comfortable engaging in normal health care activities now. Most others say they'll be more comfortable doing so in another six to ten months. All groups are similar in their attitudes about engaging in health care activities, with Bystanders slightly lagging in their willingness to return to normal.

- *Conservative respondents are much more likely to say they're comfortable engaging in health care now (conservative* **40%**, *liberal* **22%***).*

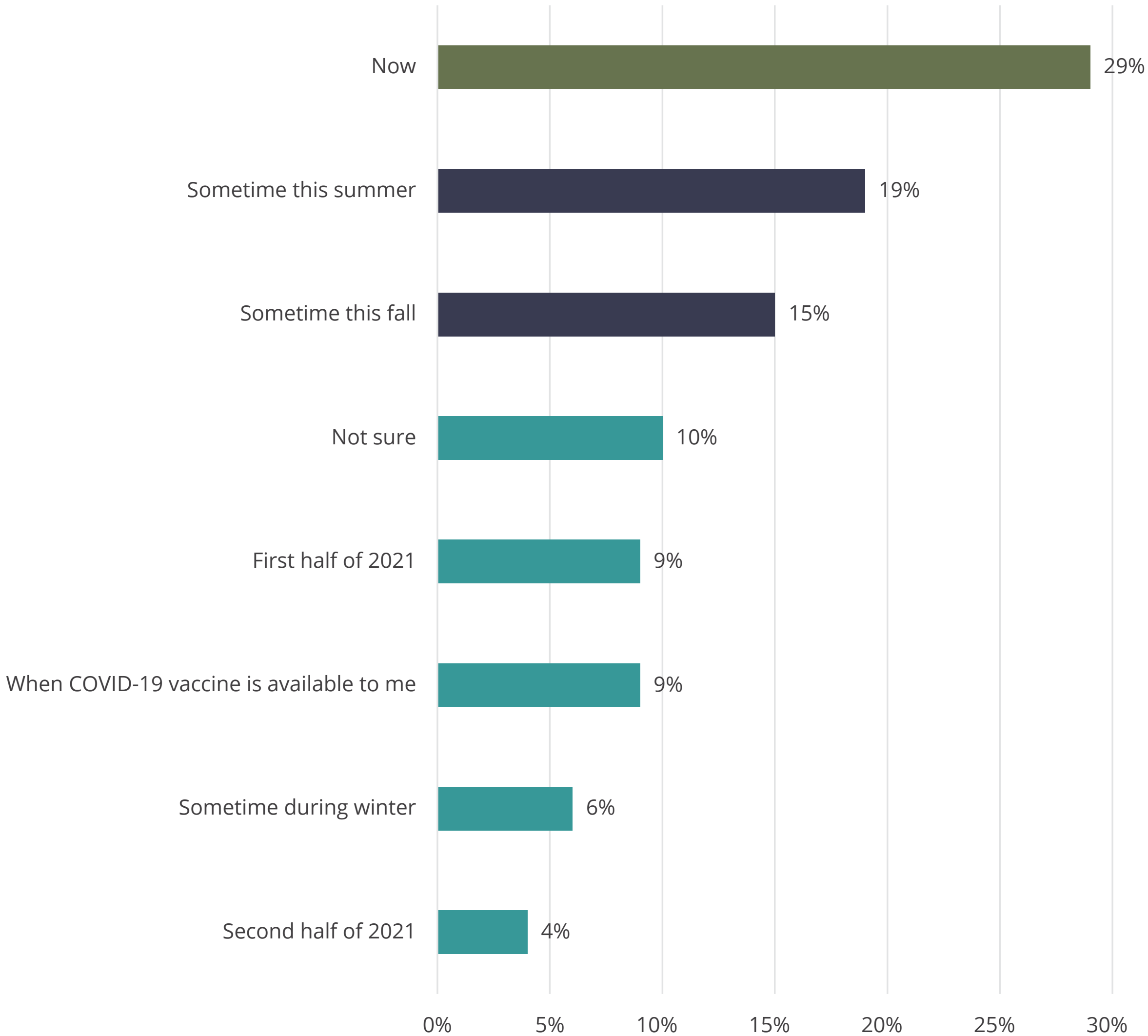
The majority say having a vaccine available or hearing the medical community says it's safe would make them comfortable sooner. Few say that the opinions of elected officials would do the same.

- *Liberals are more likely than conservatives to say that vaccine availability and the word of the scientific community would make them more comfortable.*

While many say they're just as likely to consider an assisted living facility in the future, 41% say they're less likely since COVID-19.

Conservative respondents are much more likely to say they're comfortable engaging in health care now.

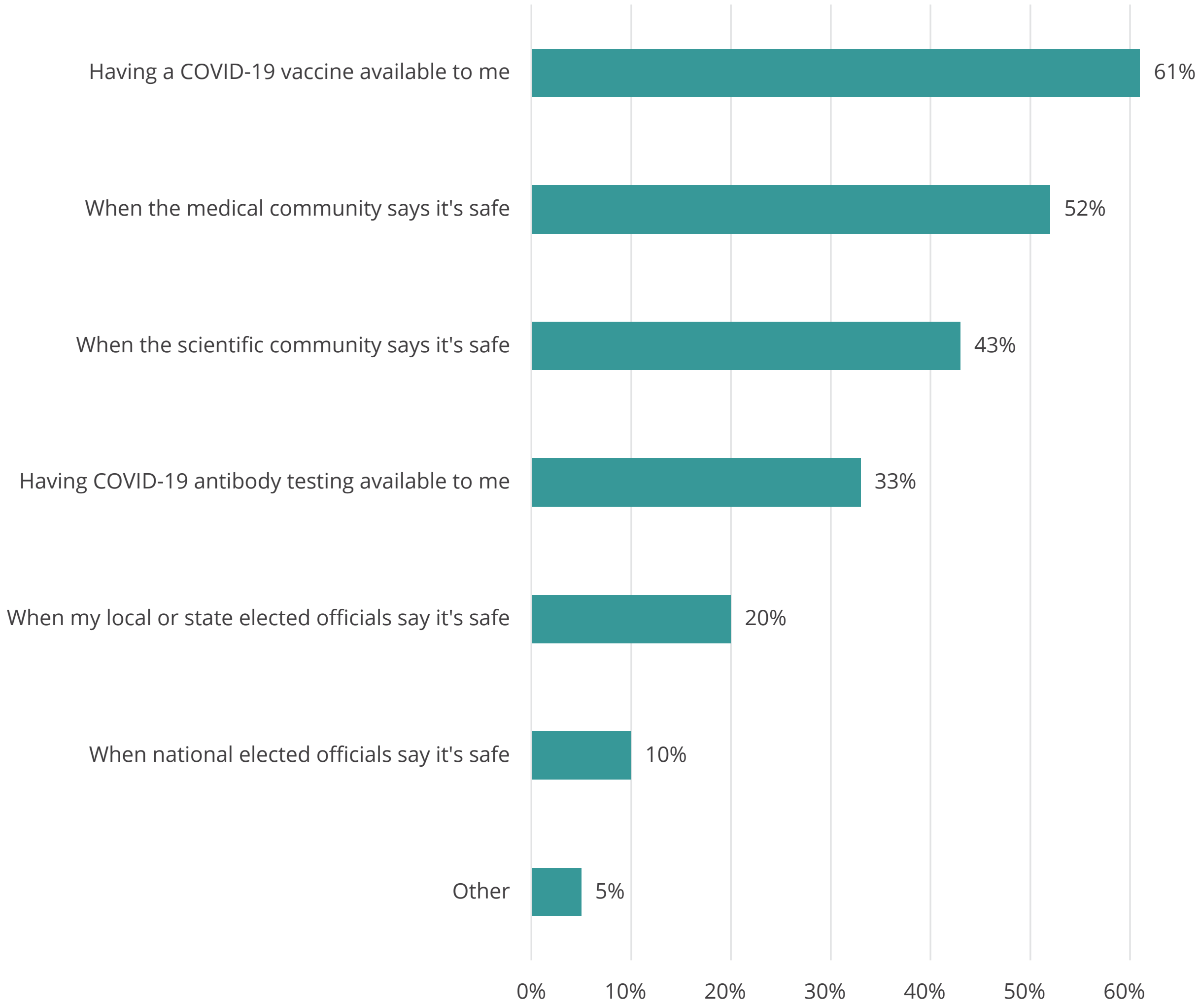
When do you think you'd be comfortable re-engaging with normal health care activities?



29% OF RESPONDENTS say they would be comfortable engaging in normal health care activities now.

Most others say they'll be more comfortable doing so in another six to ten months.

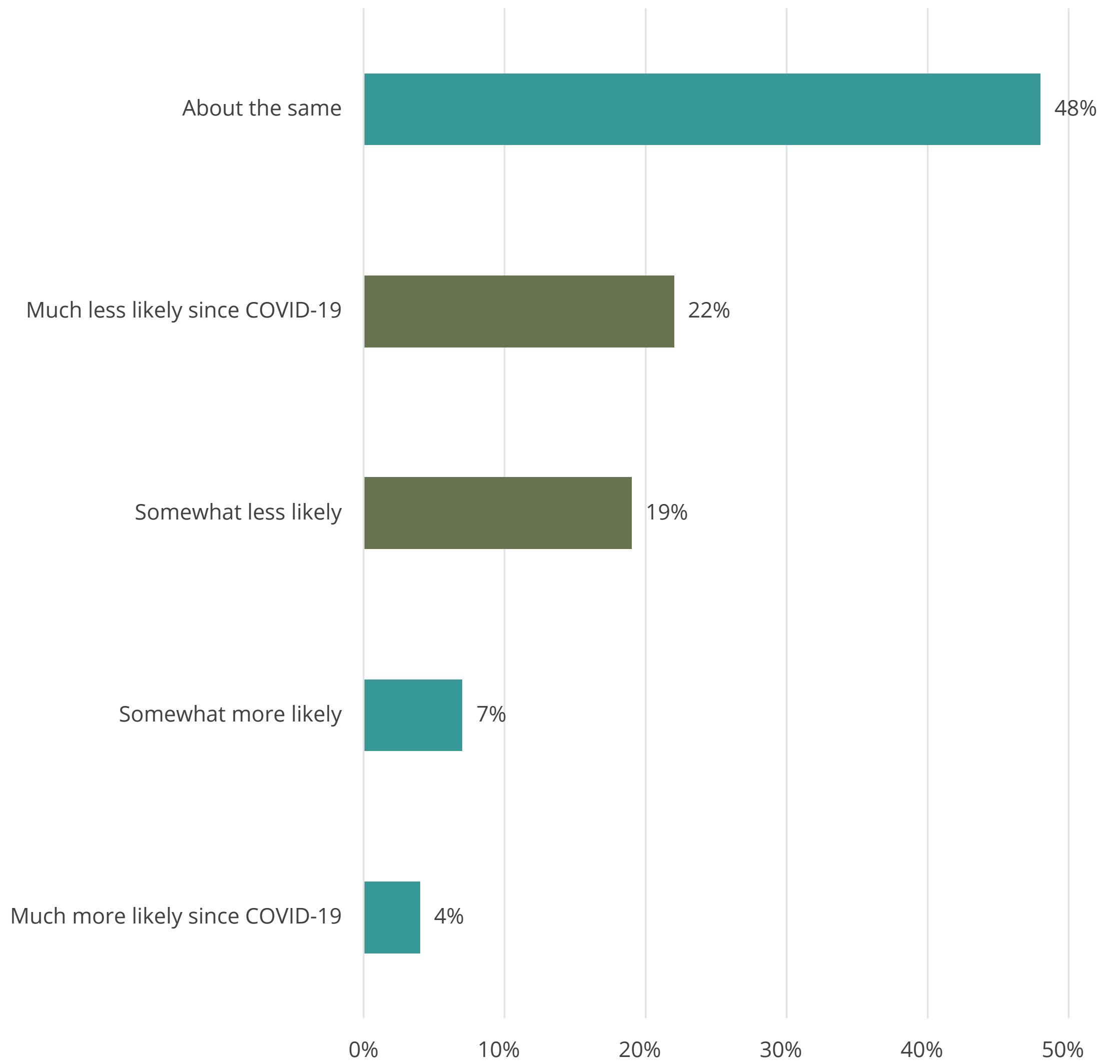
What would make you more comfortable re-engaging with health care activities sooner?



The majority of respondents say having a vaccine available or hearing the medical community says it's safe would make them feel comfortable sooner.

FEW SAY THAT THE OPINIONS OF ELECTED OFFICIALS WOULD DO THE SAME.

How likely are you to consider an assisted living facility if you need substantial levels of daily support as you age?



While many say they're just as likely to consider an assisted living facility in the future,

41% SAY THEY'RE LESS LIKELY SINCE COVID-19.

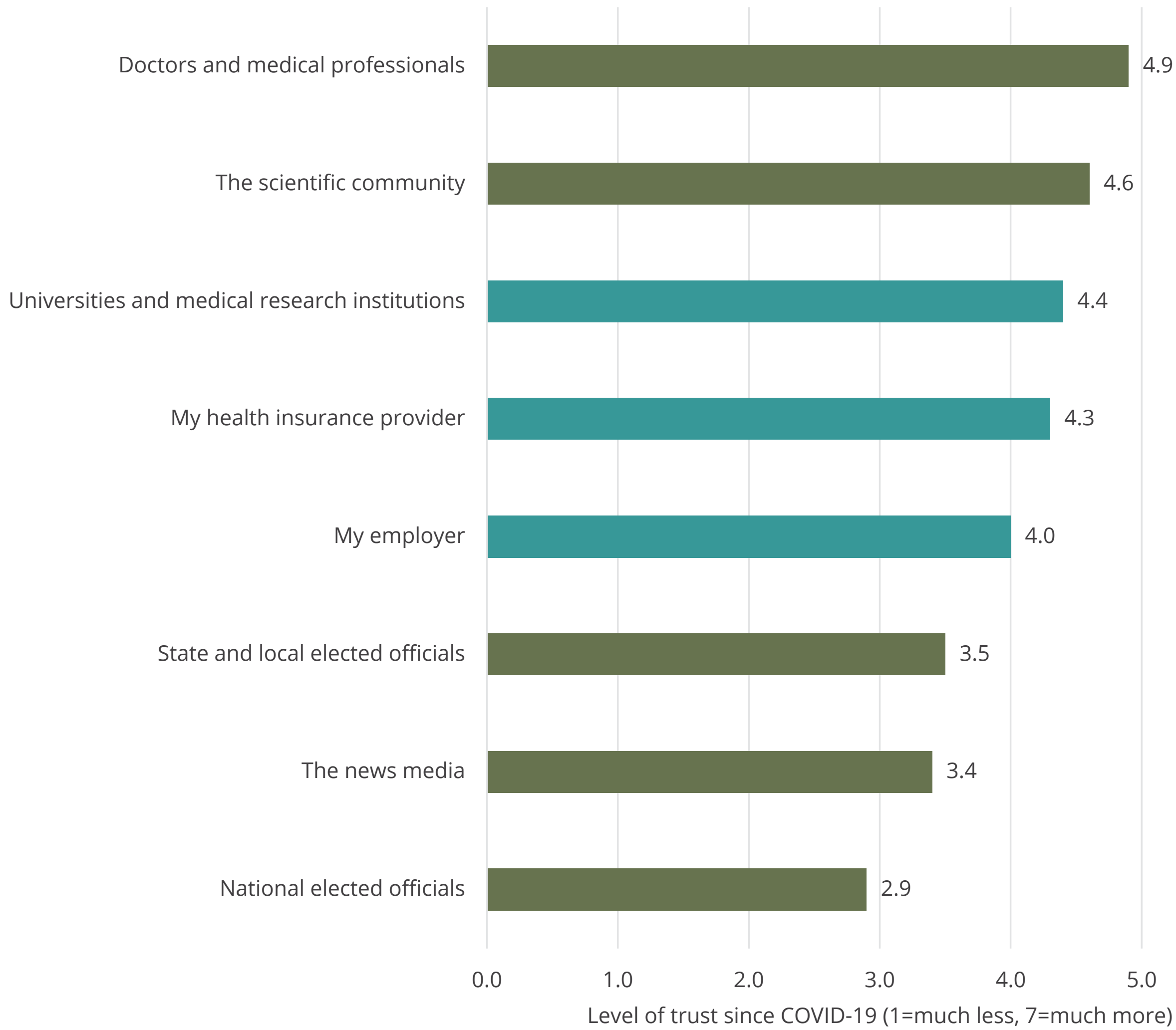
Levels of trust

The level of trust has increased most in doctors and medical professionals since COVID-19, followed closely by the scientific community. Elected officials and the media are trusted less than prior to COVID-19.

- Trust in doctors and medical professionals among the Boss respondents wasn't as strong as other groups. Trust in elected officials and media was slightly stronger amongst Bystander respondents.
- Those who identify as liberal report the greatest increase in trust in medical and scientific sources. Their trust in the media has not changed, compared to strongly diminished trust among conservative respondents.

The level of trust has increased most in doctors and medical professionals since COVID-19, followed closely by the scientific community.

To what extent do you trust the following to provide accurate, reliable information about COVID-19 and its impact on individuals, businesses and the economy?



THE LEVEL OF TRUST HAS INCREASED MOST IN DOCTORS AND MEDICAL PROFESSIONALS SINCE COVID-19, followed closely by the scientific community.

Elected officials and the media are trusted less than prior to COVID-19.

COVID-19 AMENDMENT

Trust has increased in doctors and medical professionals.

At the same time, trust in media and elected officials has decreased.

Receiving information on COVID-19

44% of respondents say their PCP or family doctor has communicated with them since the pandemic began.

- Boss respondents were more likely to communicate with their doctor than Bystanders.
- This is much more likely the case for respondents over the age of 35.

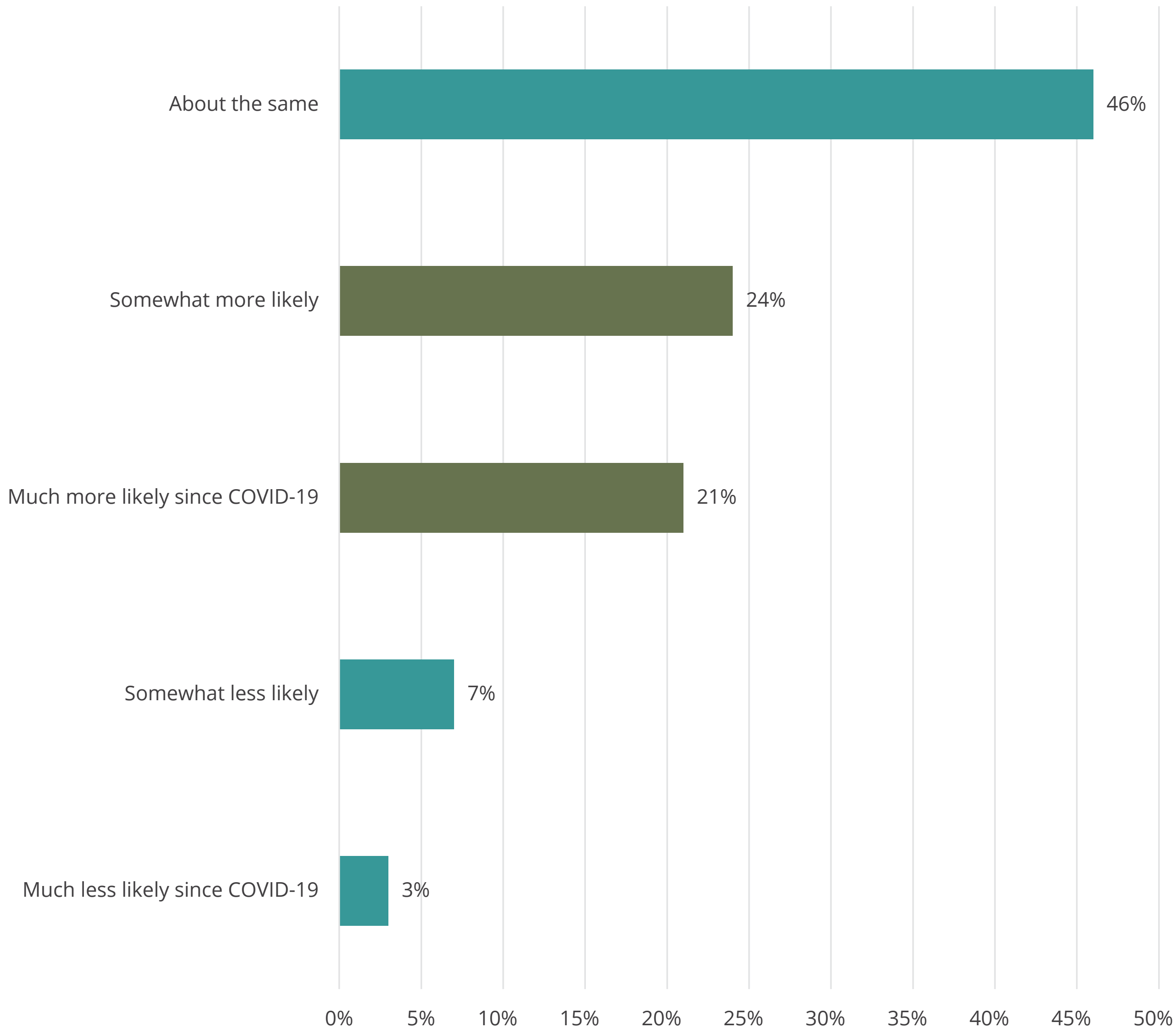
Only **16%** of respondents have been contacted by their local hospital since the pandemic began.

72% are interested to some degree in receiving information from their doctor about the pandemic.

More than half the respondents say they are more likely to use telehealth services during COVID-19.

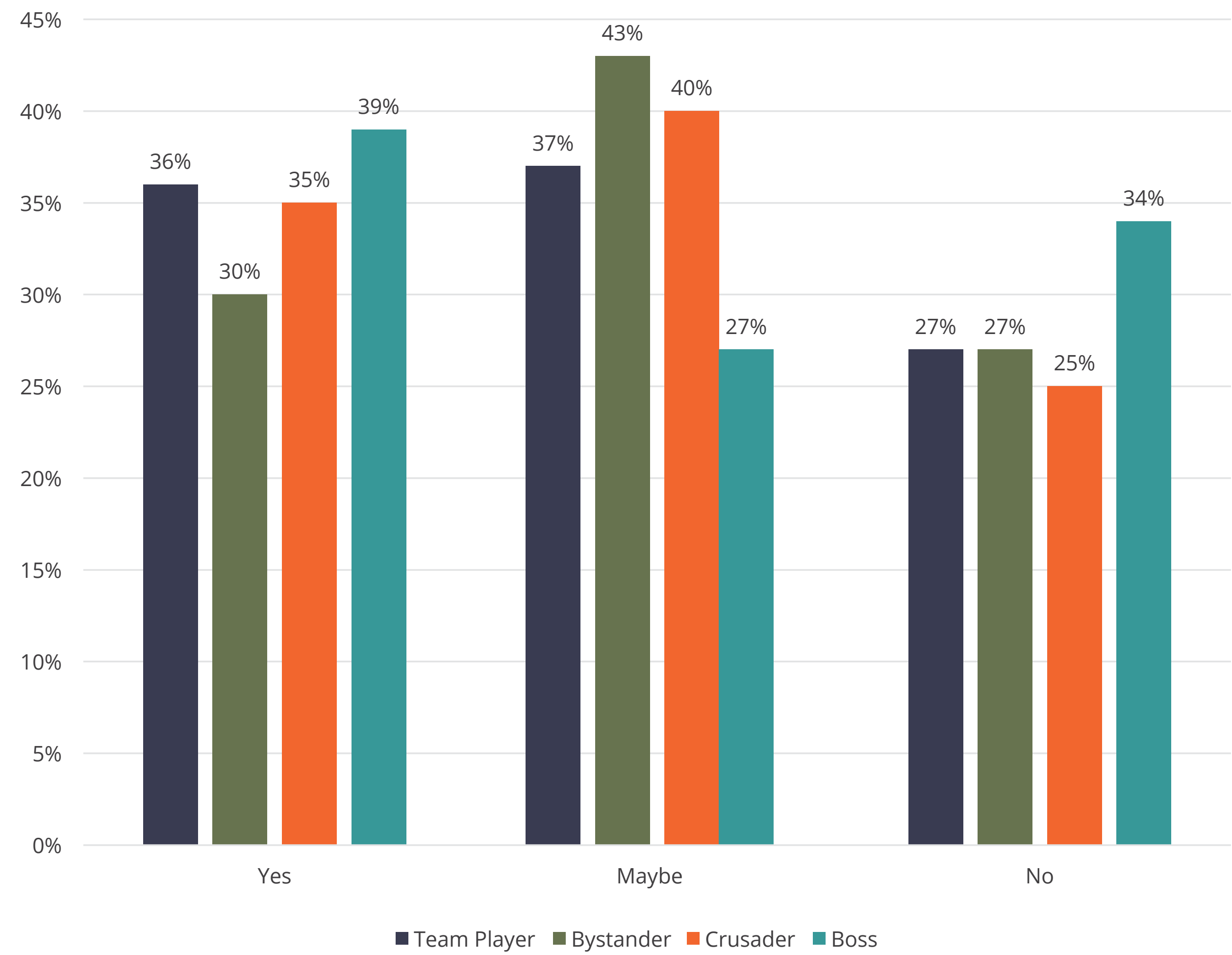
Communication from their local hospital is not as much a priority as communication from PCPs, although **21%** are definitely interested.

How likely do you think you'd be to use health care services that don't require you to leave home?



45% say they're somewhat or much **MORE LIKELY TO USE TELEHEALTH SERVICES SINCE COVID-19.**

Would you want to receive information from your primary care physician or family doctor about the pandemic?



72% ARE INTERESTED TO SOME DEGREE IN RECEIVING INFORMATION FROM THEIR DOCTOR ABOUT THE PANDEMIC.

Lightbulb MOMENT

LAVIDGE

COVID-19 AMENDMENT

Patients are most interested in receiving information from their PCP or family doctor.

More so than hospitals, clinics or other medical providers.

LIGHTBULB MOMENTS: SUMMARY

Attitudinal segmentation isn't about income, gender or race.

Having insurance and using health care aren't the same thing.

Paying attention to fees is widespread, even among those who have insurance.

Facility ownership isn't driving choice.

Loyalty to health care facilities is lower than loyalty to doctors—or hair stylists.

Interest in alternative medicine varies substantially.

Interest in a healthy lifestyle is common.

LIGHTBULB MOMENTS:
POST-PANDEMIC SUMMARY

Trust has increased in doctors and medical professionals.

Patients are most interested in receiving information from their PCP or family doctor.

Authors

Stephen Heitz
Chief Innovation Officer
sheitz@lavidge.com

Winning "Innovator of the Year" and Forbes "Best of the Web" awards, Heitz led the LAVIDGE Interactive team as Managing Director for more than 12 years before being named Chief Innovation Officer in November 2017.

Tim Trull
Managing Director, Strategy
ttrull@lavidge.com

Bringing 30 years of experience to LAVIDGE, Trull has developed strategic plans for agency clients since 2004, serving as Managing Director of Strategy since 2014.

LAVIDGE

CONTACT INFORMATION

Dave Nobs
Managing Director,
Business Development
dnobs@lavidge.com
480.306.6501