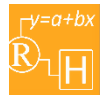


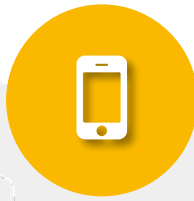
How is the Coronavirus Impacting Healthcare Perceptions and Behaviors? (Renown Local Market Results vs. National)



klein & partners



- This report presents findings from Renown Health's local market compared to national findings from Klein & Partners' National Omnibus Wave II survey which focused on consumer reactions to the Coronavirus.



Online survey



National: n=502 / Local: n=306



Wave II Fielded: May 1-4, 2020 (Local: May 1-7)



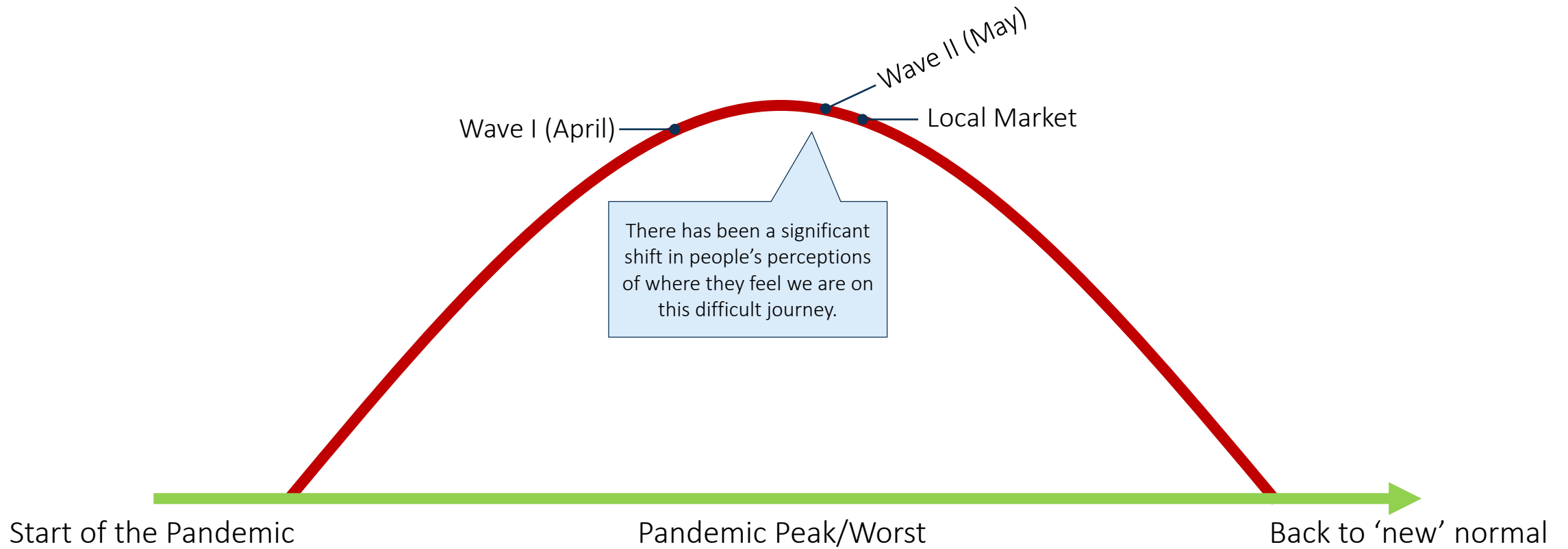
National random sample of adults + an oversample of consumers across Renown's PSA (n=156) and SSA (n=150) market areas

Note: National scores will be identified in charts either as 'National' (always Wave II) or 'Wave II, Wave I.' Renown scores will be identified as 'Local.'

Note: Arrows (↑↓) and **bolded scores** indicate a statistically significant difference between those two data points

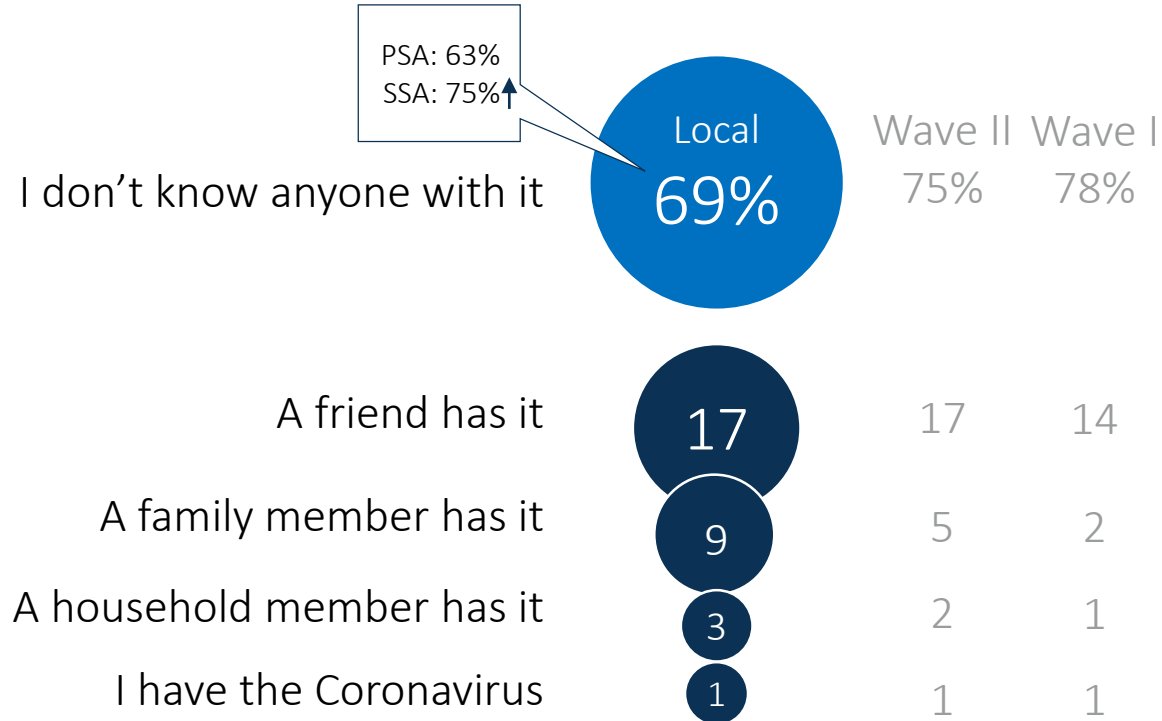
What did we learn?

Where are we on this journey?

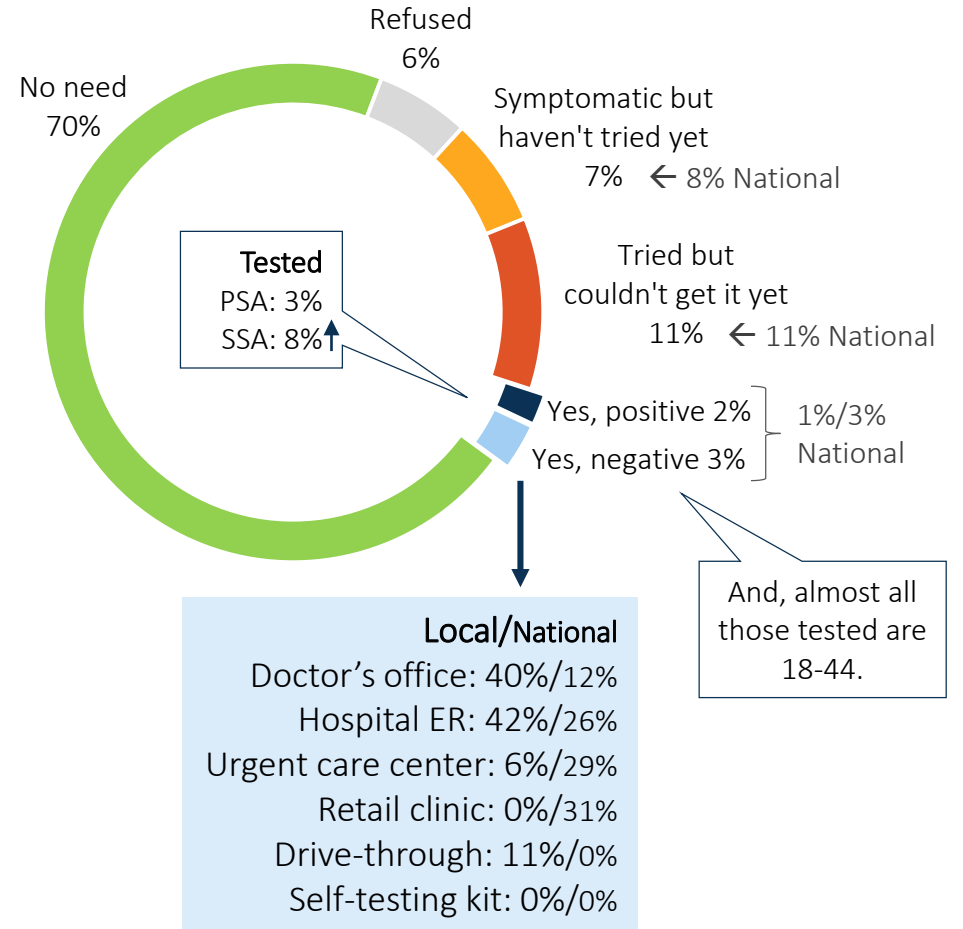


Coronavirus Exposure

Exposure to the Coronavirus



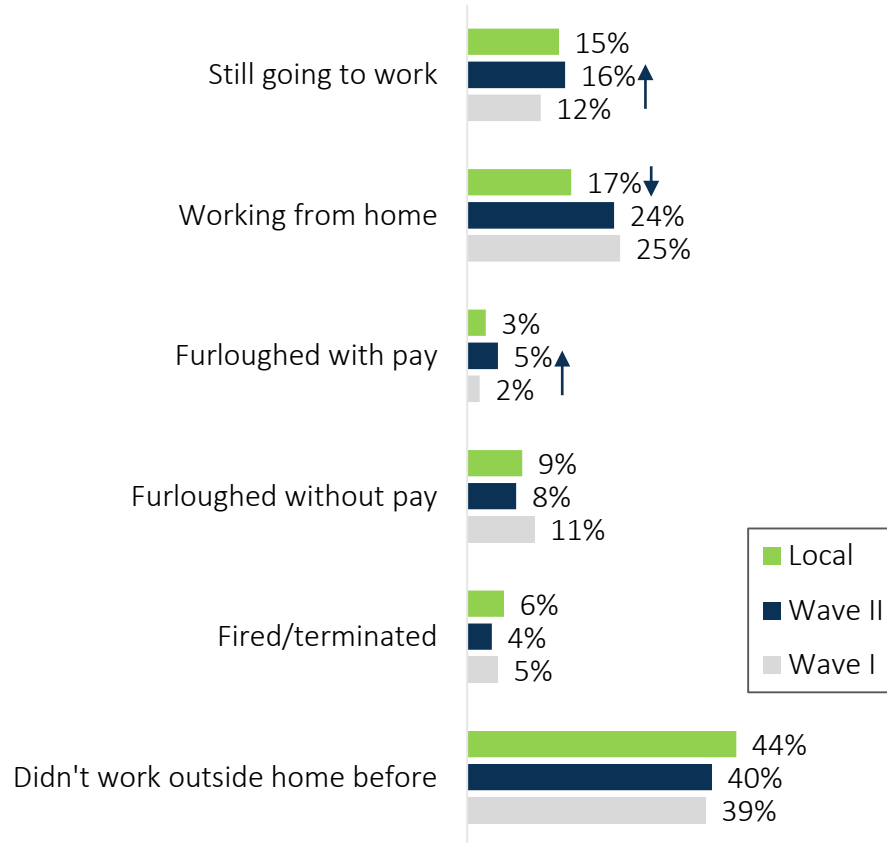
Tested for Coronavirus?



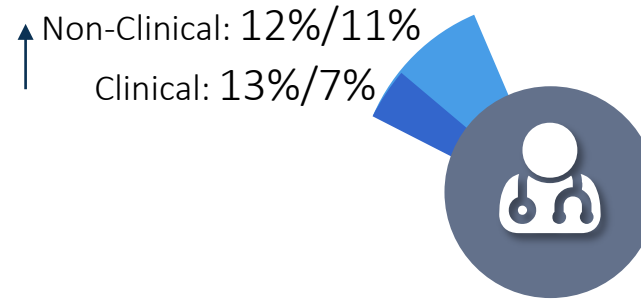
Work Impact

The Coronavirus impact on work

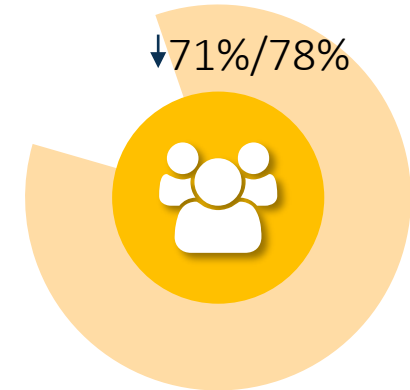
Work Status



Work in Healthcare?



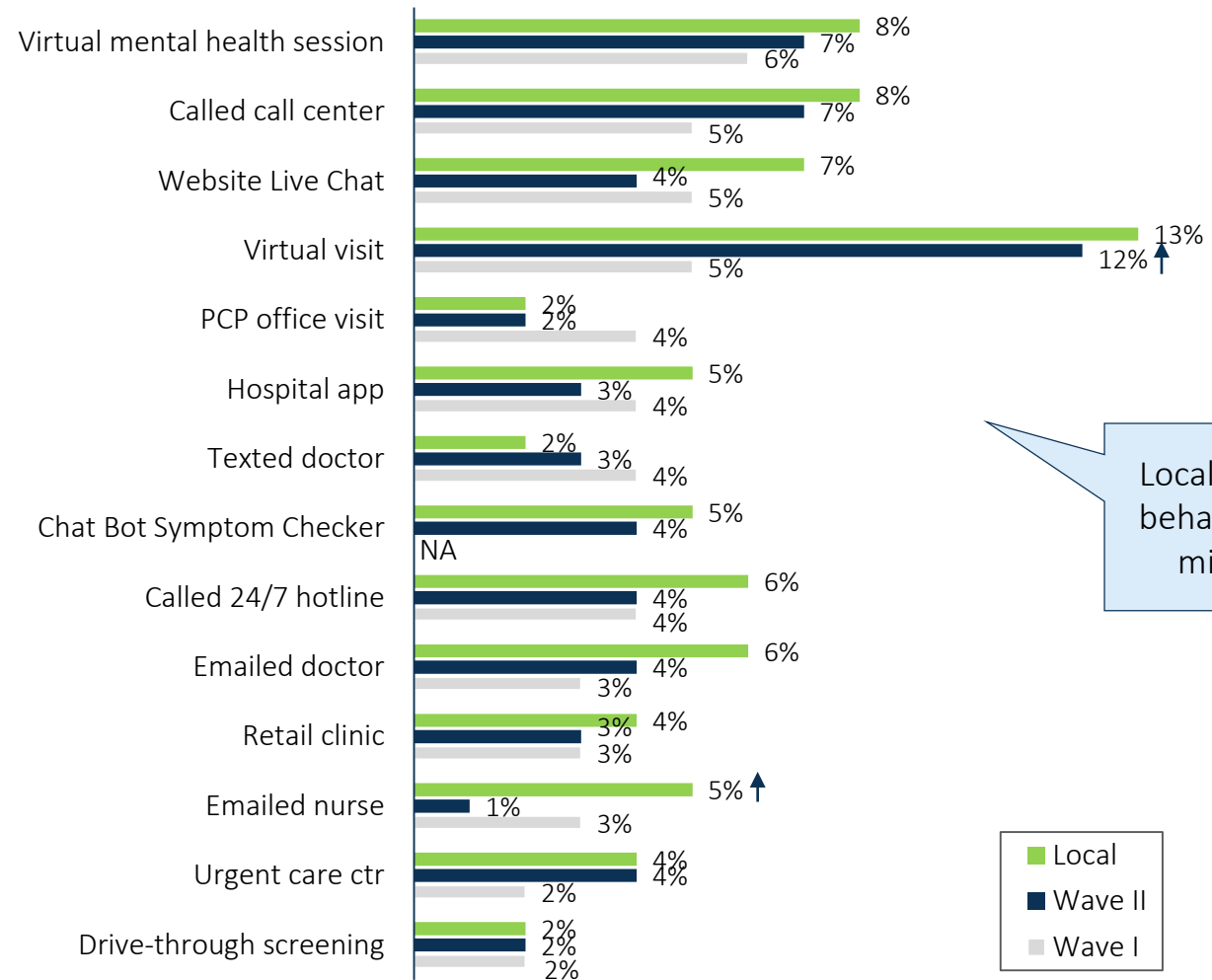
Non-healthcare Occupation



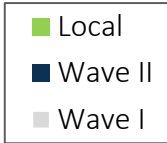
Note: Local/National

Behaviors During and After the Coronavirus

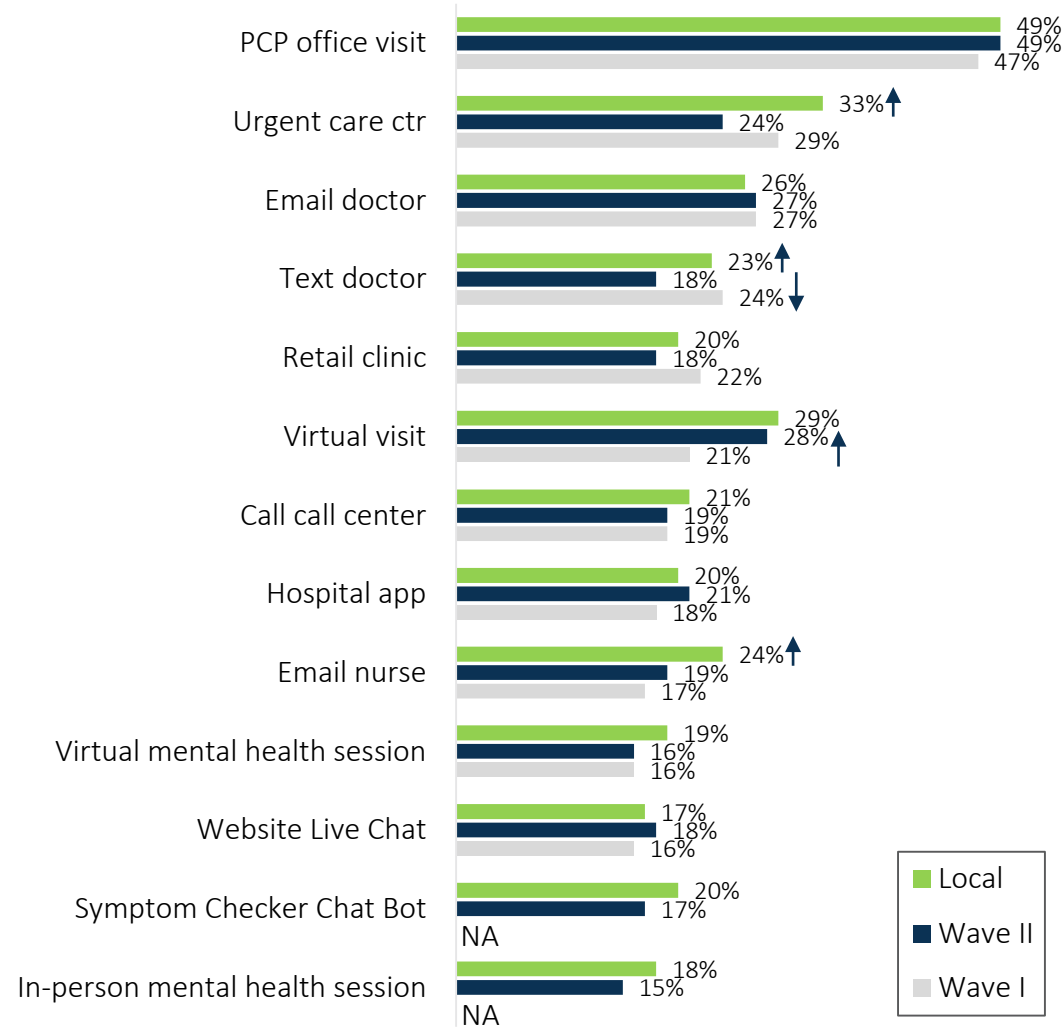
'New' Healthcare Behaviors During the Coronavirus



Local 'new' healthcare behaviors pretty much mirror nationally.



Healthcare Behaviors 'Definitely' Will Do After The Coronavirus



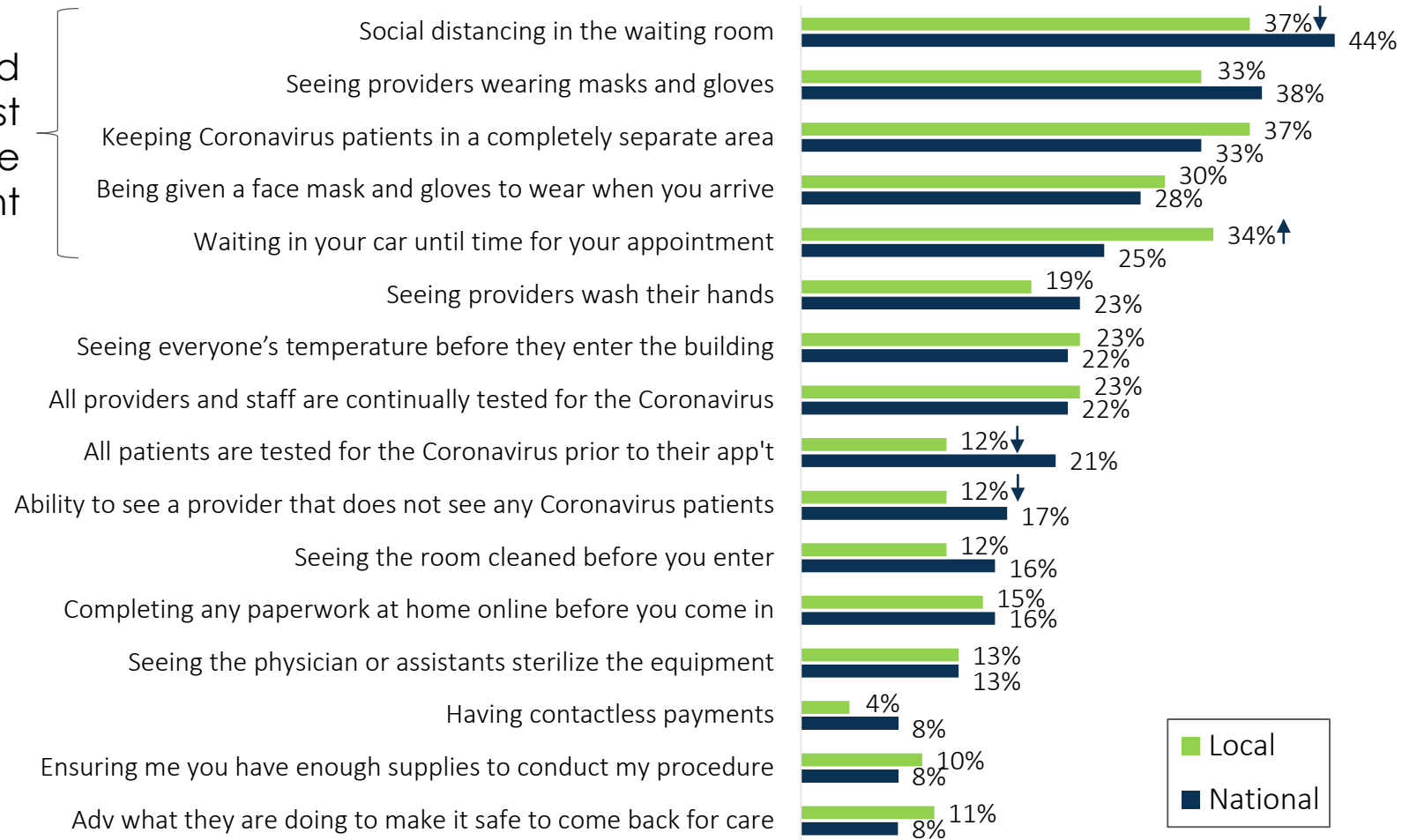
When will activities return to normal? (Local)

Activity	Immediately	After some time (3-6 mo)	Not sure ever go back	Not sure
Social Activities				
• Shaking hands	17%	36%	35%	12%
• Hugging	22%	44%	23%	11%
• Social gatherings	20%	57%	13%	9%
• Having guests over to house	31%	47%	10%	12%
Events				
• Concerts/Sports	15%	53%	21%	11%
• Conference/Seminar	10%	50%	29%	11%
Travel				
• Flying domestically	16%	54%	23%	8%
• Flying internationally	9%	58%	24%	9%
• Taking a cruise	8%	36%	40%	15%
• Staying in a hotel	17%	57%	16%	9%
Activities				
• Eating at a restaurant	29%	53%	10%	8%
• Shopping at a store/mall	26%	52%	15%	8%
• Going to the gym	25%	42%	23%	10%
• Going to place of worship	33%	35%	19%	13%
• Going back to work	47%	29%	13%	11%
• Saving money	57%	17%	10%	17%

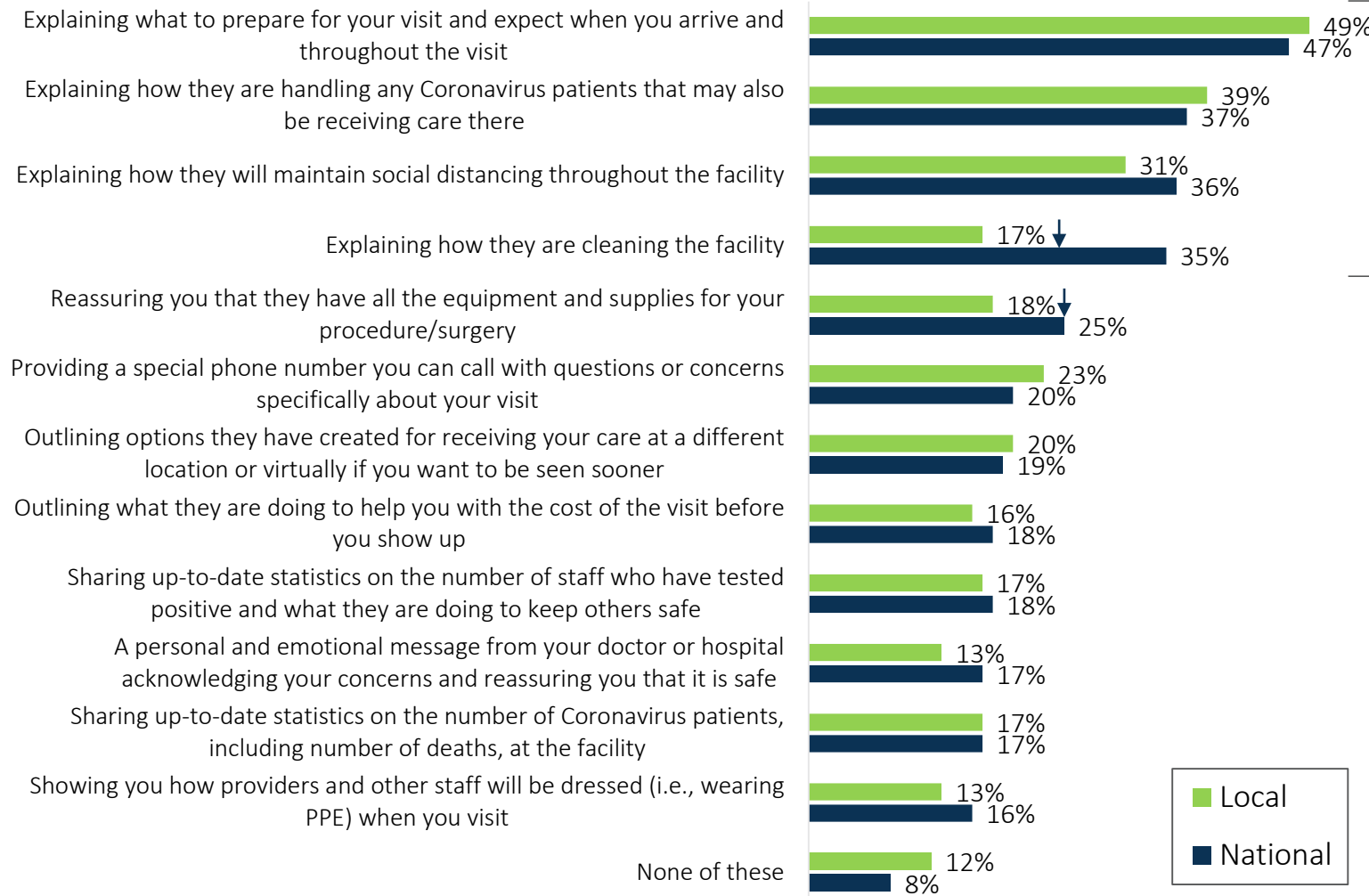
Red = Local score significantly lower than National | Blue = Local score significantly higher than National

Things You Need to Do to Ease Safety Concerns

Separation and protection just like we have been taught



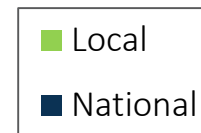
Preferred Messaging with Patients
(that would put them most at ease about coming in)



Let us explain how we are...

-or-

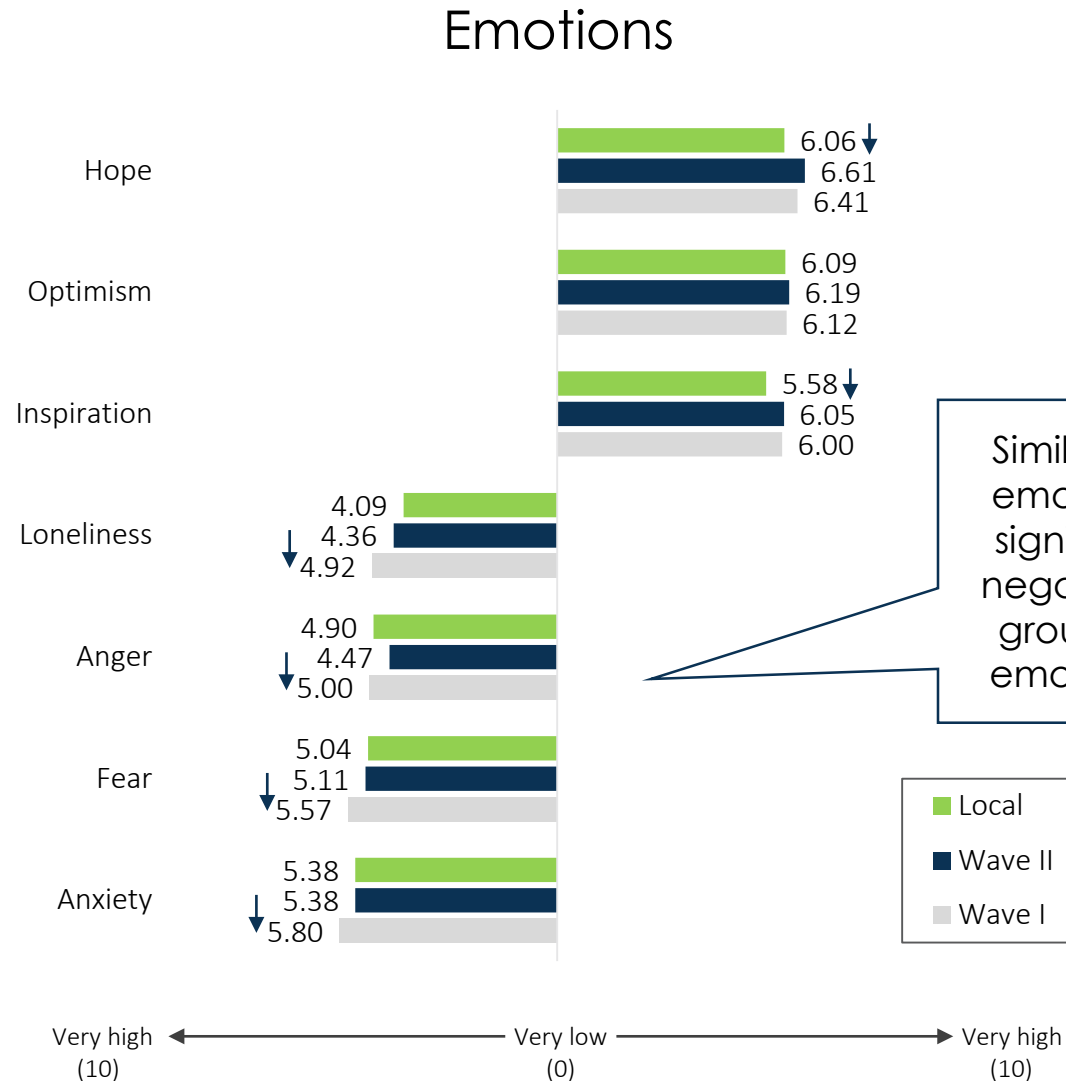
Here's what we are doing to...



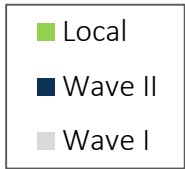
Renown Custom Local Questions

Emotions and Level of Concern

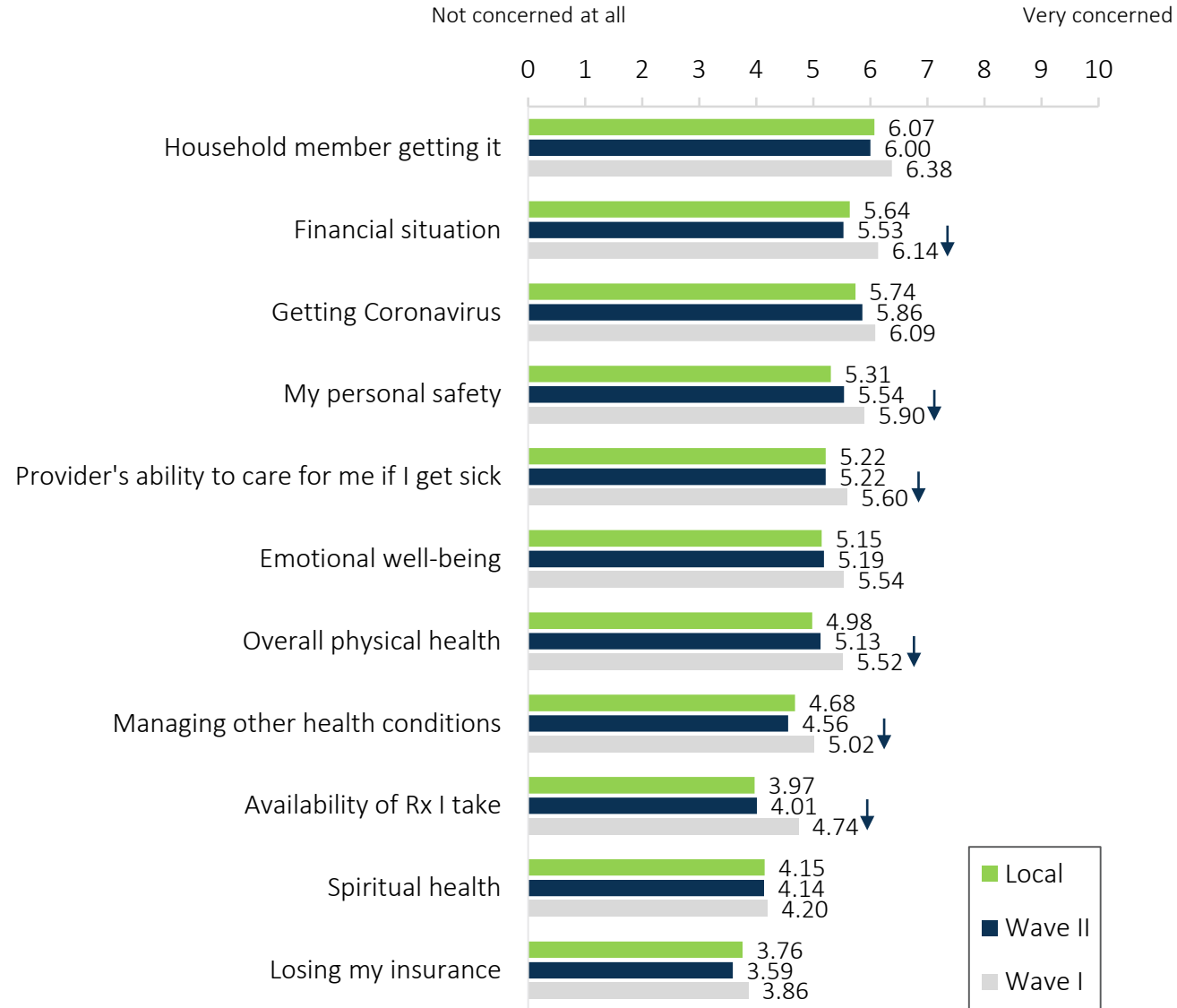
Emotions people are feeling now



Similar to national negative emotions, those 18-44 have significantly higher levels of negative emotions. This age group is getting hit hardest emotionally and financially.

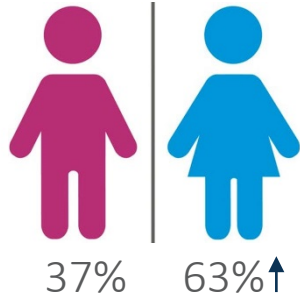


Level of Concern Regarding...



Appendix

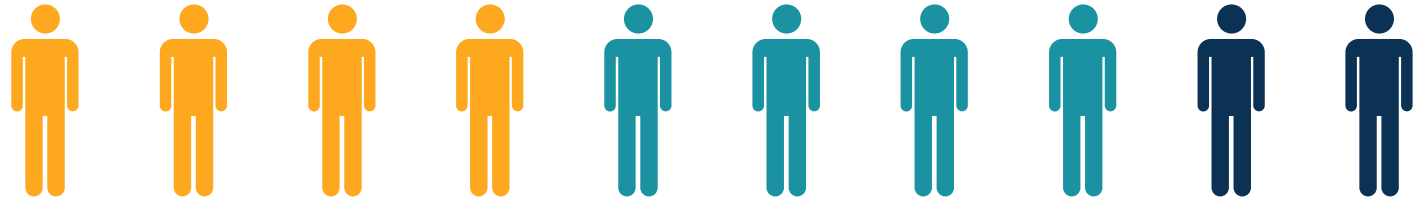
Demographic profile



18-44 (41%)

45-64 (38%)

65+ (21%)



Caucasian: 71%
 Hispanic: 22%
 Asian: 5%
 African American: 2%↓

For _____
 Address _____ Date _____

R_x

	<u>Local</u>
Group	36%
Ind/Exch	10
Medicare	22
Medicaid	10
Military	4
No insurance	13↑

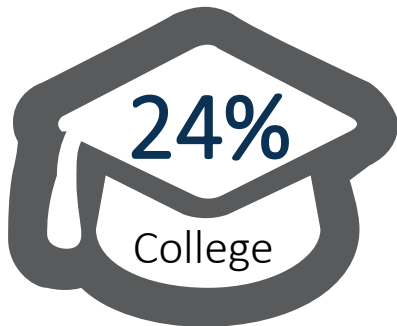
REFILL _____ TIMES _____, M.D.
 DEA NO. _____ Address _____



23%
 Have kids

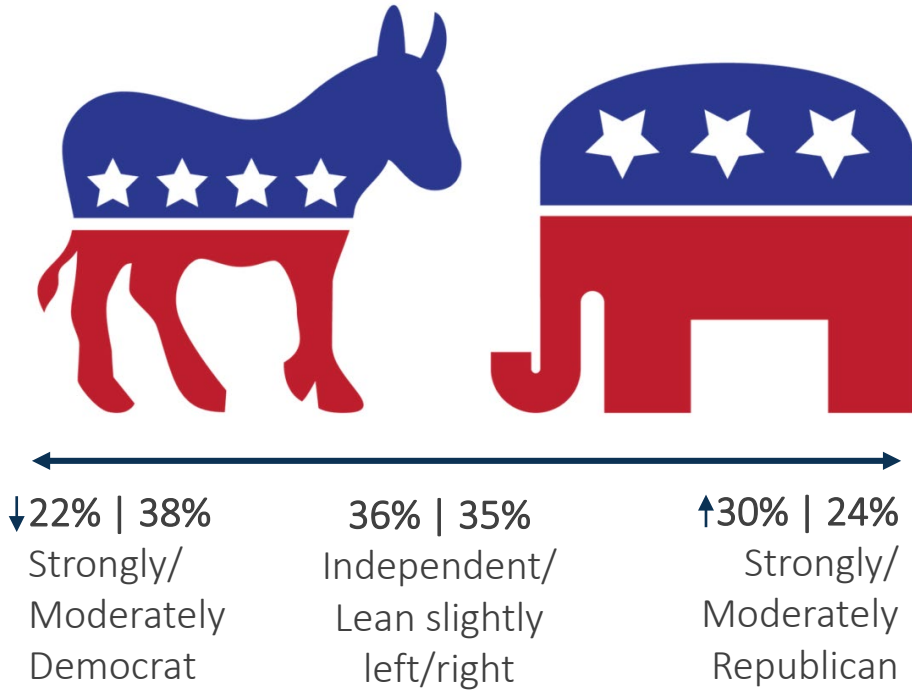


18%
 Live alone



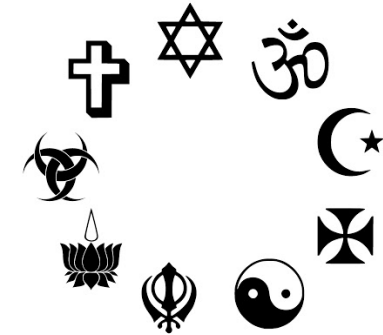
\$54,175 – Median household income

How we identify



Other party: 1% | 0%
Not sure: 11% | 3%

There is a correlation between lack of a religious faith and higher levels of concern.



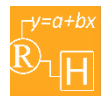
Catholic: 25%	↓	27%
Other Christian: 18%	↓	25%
Jewish: 1%		2%
Islamic: 0%		0%
Hindu: 0%		0%
Other religion: 3%		10%
No specific religion preference: 30%	↑	25%
Atheist/Agnostic: 17%	↑	8%
Prefer not to share: 6%		3%

(Note: Local | Wave II)

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