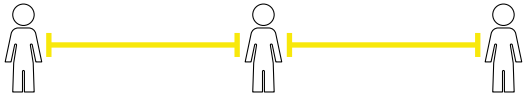
evive

Evive National COVID-19 Consumer Behaviors Survey

April | 2020



The Evive National COVID-19 Consumer Behaviors Survey was conducted on April 11, 2020. It included questions from our ongoing daily or semi-daily polls to our MyEvive and Evive.Care user bases and investigated behaviors and outlooks in a number of new areas.

Reporting results from 750 respondents, this survey finds that while worry remains high, preventive behaviors reflect that concern. Consumers are open to solutions such as telehealth, and spirits are buoyed by strong employer communication practices during the crisis.

Concern + Anxiety

Worry remains widespread

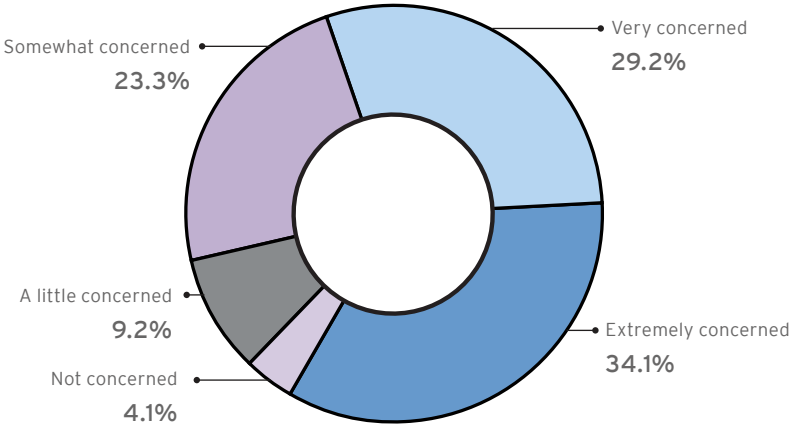
Unease about the situation has consumers mulling over their perceived risk of contraction, the possibility of running out of household necessities, and—for some—questions around access to non-COVID-19-related medications.

Worry remains widespread

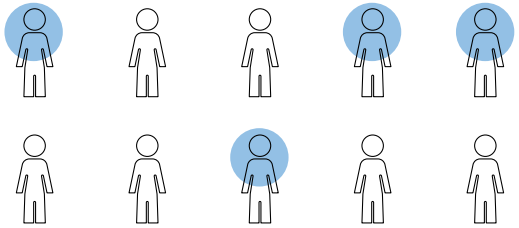
Nearly 2 out of 3 respondents report being "very" or "extremely" concerned about COVID-19. And 4 out of 10 respondents felt "high" or "somewhat" high feelings of anxiety, stress, or sadness—underscoring the need for continued support and promotion of mental health resources during this time of crisis.

> Nearly 2 out of 3 respondents report being "very" or "extremely" concerned about Coronavirus/COVID-19

What is your level of general concern about Coronavirus/COVID-19?



What is the highest level of anxiety, stress, or sadness you have felt over the past 7 days?



4 out of 10 respondents reported "high" or "somewhat high" anxiety

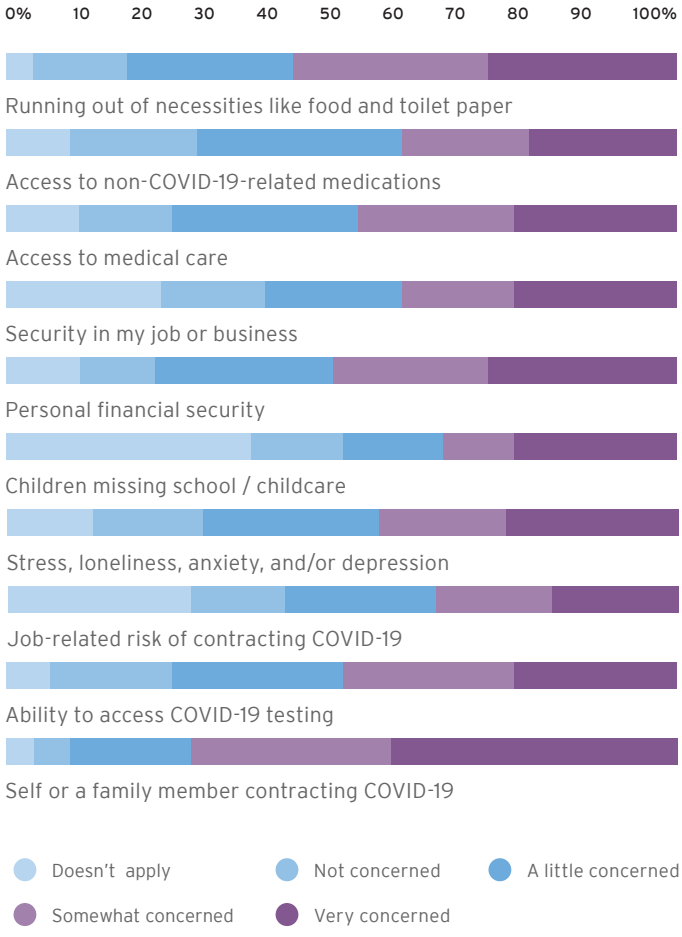
This burdened outlook springs from a variety of sources across the financial, healthcare, and familial spheres—though not all areas of concern are created equal. The top two categories of specific concern are virus contraction and staying supplied in essentials at home.

More than 2 out of 3 respondents (68%) report being "very" or "somewhat" concerned about themselves or a family member contracting COVID-19.

More than 1 out of 2 respondents (55%) report those levels of concern about running out of necessities like food and toilet paper.

Concern across other categories—such as job-related risk of contracting COVID-19, job security, and children missing school—was brought down by a large number of respondents reporting that such areas were not relevant to their current situation.

What is your level of general concern about the following aspects of the COVID-19 situation?



Who's the most concerned?

Gender does not seem to have a pivotal impact on being "very" or "extremely" concerned; 67% of men versus 61% of women surveyed fell into these two categories.

Those without children were "very" or "extremely" concerned at a rate of 59%; for those with children, the prevalence of high concern rose to 67%.

Nearly 2 out of 3 people surveyed reported at least one major risk factor for COVID-19 in their household.

However, this acknowledgment of increased household risk does not translate into a notably higher rate of worry about self or a family member contracting Coronavirus/COVID-19.

Of respondents with no increased risk in the household, **65% reported** feeling "somewhat" or "very" concerned about themselves or a family member contracting Coronavirus/COVID-19; however, that only bumped up to **69% with a risk factor present**.

Do you or anyone in your household have any of these risk factors for COVID-19?

Household risk factor	# of respondents	Overall incidence
Diabetes	142	18.9%
Smokes tobacco	179	23.8%
Asthma	164	21.8%
Heart disease	56	7.4%
Over age 60	212	28.2%
Immunocompromised	102	13.6%
No risk factors	283	37.7%

Another key finding within the high-risk household group was their well-warranted concern about access to non-COVID-related medications.

With chronic conditions such as diabetes and asthma, as well as advanced age included in this group, it's likely that daily medications are on the mind.

Accordingly, **more than 4 out of 10 respondents** reported that they were "somewhat" or "very" concerned here.

> Access to medications is an area of high concern among households with chronic conditions present.

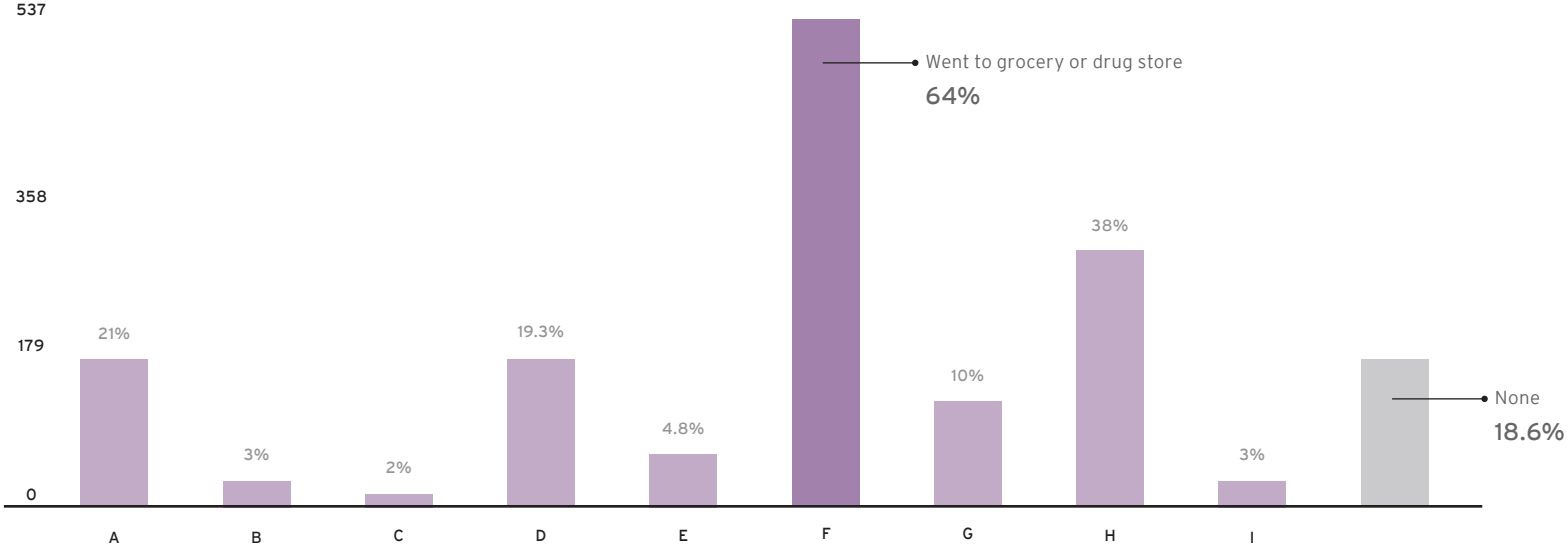
Risk + Prevention

Transforming anxiety into action

A full 95% of people agree that social distancing remains necessary. Better yet, they're backing up that opinion in great numbers with strong personal practices in risk avoidance and preventive measures.

New norms and behaviors

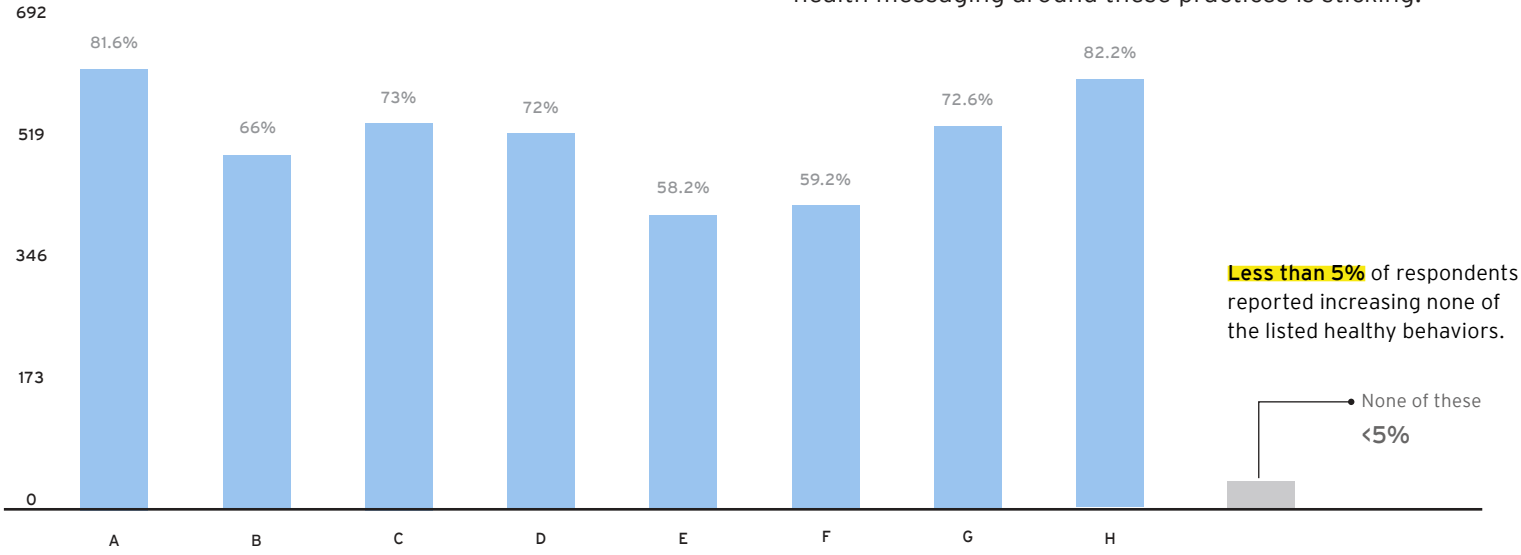
Auspiciously, personal behaviors are reflecting the overall high level of concern for the situation. People are doing their best to follow the norms of social distancing, with the highest infraction of the "stay at home" practice being visiting a grocery store or drug store within the past 7 days (about 2 of 3 respondents).



Over the past 7 days, I...

A: Visited family or friends in person
B: Attended a gathering of 10+ people
C: Took my child to school or daycare
D: Went to work outside my home
E: Took public transit
F: Went to the grocery or drug store
G: Went to hospital or doctor's office
H: Took a walk
I: Went to a place of worship

Better yet, adherence is rising. All possible survey responses around hygiene (avoidance of face-touching, proper handwashing) and patterns of staying at home or staying safe while out in public were reported as "behaviors I've increased within the past 7 days"—and by more than 50% of respondents in each case. The most common increases were found in hand-washing and staying at home, showing that public health messaging around these practices is sticking.



Over the past 7 days, I've increased these behaviors...

A: Washing my hands w/ soap + water
B: Using hand sanitizer
C: Avoiding public places
D: Avoiding close contact w/ others
E: Using household sanitizing cleansers
F: Avoiding touching my face
G: Keeping at least 6 ft from others when outside
H: Staying home as much as possible

Healthcare Attitudes

Discovering digital alternatives

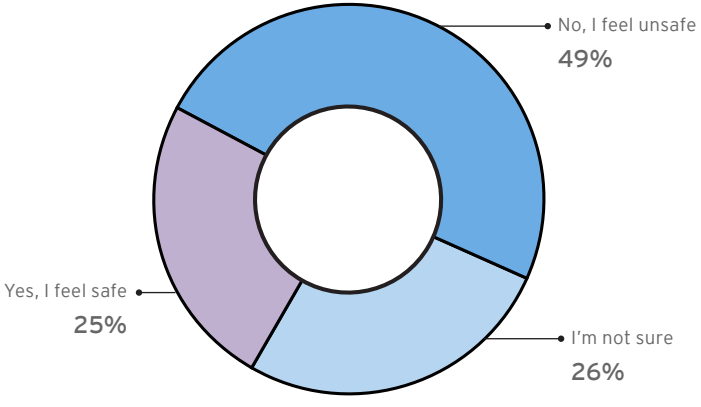
Most people are hesitant to visit a physical site of care at this time—but recognize telehealth as a viable option for themselves and their families.

Accessing healthcare

The theme of deep concern trails into healthcare access. With social distancing and risk avoidance on the mind, it makes sense that only 1 out of 4 respondents report feeling safe going to a doctor's office, an urgent care center, or a hospital. Just as many are simply unsure.

> Only 1 out of 4 respondents report feeling safe going to a doctor's office, an urgent care center, or a hospital.

Do you feel safe going to a doctor's office, an urgent care center, or a hospital during this time?



Luckily, the vast majority of respondents (82%) also indicate a willingness to try telehealth during this period of crisis.

That number includes 88% of the population who reported feeling unsafe going to physical sites of care—and 78% of the population who reported feeling unsure.

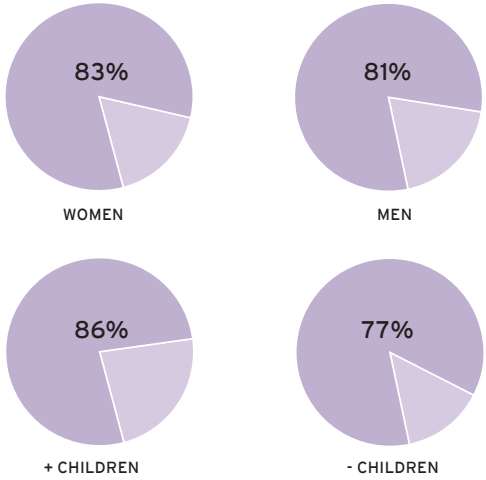
This shows that, despite an overall positive sentiment, there's still some work to do in terms of promoting telehealth as a viable care alternative.

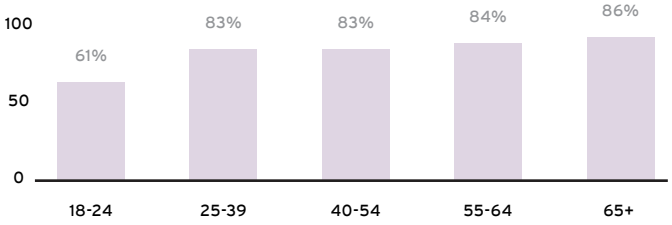
Who's most open to telehealth?
Differences were not notable between women (83% of whom were receptive) and men (81%).

Receptivity was highest among those 65+ years old—and notably lower among those 18-24 years old. This dip may be explained by a smaller sample size across this age group or by the absence of young children in these households.

Kids drove up the already-high reception rate. 86% of respondents with children would try telehealth, versus 77% with no children.

Would you consider using a telehealth service during the Coronavirus/COVID-19 situation?





Employee Experience

The significance of staying connected

Many employees are not hearing regularly from their employer during the crisis, contributing to diminished feelings of employer support and employee loyalty—when both parties need it most. Communication changes the story.

The employee experience

> 1 in 5 of those employed or actively furloughed reported never receiving employer communications about benefits or resources

Inquiry around the employee experience during COVID-19 generated fascinating—and actionable—insights. A substantial subset (nearly 1 in 4) of the employed or actively furloughed population has received employer communications about the operational impacts to the business due to COVID-19 just "once or twice" or "never." And more than 1 in 3 people have received employer communications regarding relevant benefits and resources as infrequently as "once or twice" or "never."

How often is your employer communicating with you about the Coronavirus situation regarding operational impacts to the business?

Daily or weekly, on average

77%

Once or twice, or never

23%

How often is your employer communicating with you about the Coronavirus situation regarding benefits or resources that you as an employee can use?

Daily or weekly, on average

66%

Once or twice, or never

34%

It goes to follow that feelings of employer support during the crisis are neutral at best. Even while employers are making careful moves to secure their business and help their workforce, the impact is fairly opaque to employees in the absence of clear and consistent communication. In fact, 4 out of 10 respondents say they feel supported by their employer "no more than usual" or "less than usual."

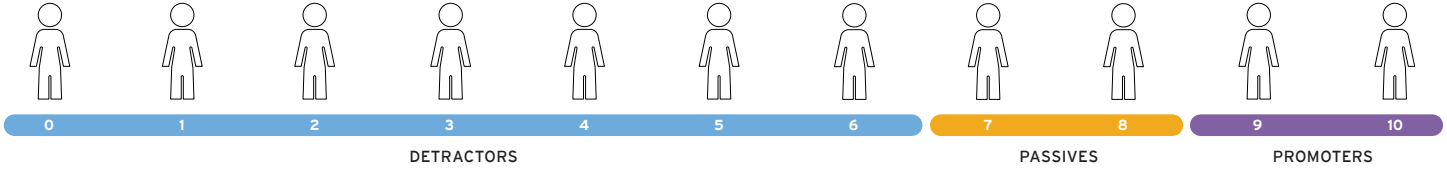
Nearly 3 out of 4 respondents (71%) feel no change in loyalty or feel less loyal than usual to their employer. When asked to give a net promoter score (NPS) to their employer in light of COVID-19, they had similar feedback, generating an **overall NPS score of -4.8**.

How likely are you to recommend your employer to others in the future based on how they've handled COVID-19?

Detractors	38.7
Passives	27.4
Promoters	33.9

Net Promoter Score (NPS)

-4.8



Communication changes everything

The key to uprighting these negative perceptions—and to helping mend worry overall—was regular employer communication.

People who received weekly or more frequent communications about their employer benefits made up **78% of the NPS promoter population**. Though not mutually exclusive groups, those who learned about operational impacts on a weekly or more frequent basis made up a strong 86% of the promoter pool.

> **Respondents who were communicated to daily flocked to the very top of the NPS scale.**

This elevated NPS status tracks back to more personal feelings of support and loyalty. 1 out of 2 respondents who felt supported by their employer "a lot more than usual" during the crisis gave an NPS rating of 10.

And those same highly-supported respondents felt loyalty to their employer "a lot more than usual" at a 44% incidence.

Even tempering the feeling of support translated into just as strong of an employer connection, as those who felt supported "more than usual" also felt loyalty at a 43% incidence.

When given **operational impact updates** daily,
1 out of 3 respondents gave an NPS of 10 to their employer

When given **reminders of benefits and resources** daily,
1 out of 3 respondents gave an NPS of 10 to their employer

Conclusion + Recommendations

> People are doing a commendable job of following newly recommended health and social procedures—but the impact of these new behaviors and the emotional burden of the COVID-19 pandemic is taking its toll.

Employers should communicate well (and often) to make sure their diverse and distanced workforce understands the steps being taken to protect them—and the benefits and resources available to help them live, cope, and stay healthy.

Better yet, **employers should have access** to key insights into the significant attitudinal, health, and behavioral differences across individuals: in order to communicate to each employee in just the right way at just the right time to drive positive action and satisfaction.

Specific opportunities emerge for key message segmentation. For example, the difference in willingness to try telehealth across age groups and household status could translate into targeted messaging that understands and speaks to generational or life-stage differences, addressing barriers and painting a more compelling and **personalized case for engaging** with that technology.

Going a step further, **using data to pinpoint** top concerns across individuals—and address them with available resources—could have a tremendous impact on both attitudes and health outcomes. For those high-risk households worried about access to non-COVID-19 medications, for example, the timing is no less than perfect for a communicative employer to highlight mail-order opportunities in the pharmacy plan.

Further polling over time will uncover new pictures of consumer attitudes, adherence, and their valuable sentiments as employees—particularly in the context of return-to-work.

Survey methodology and demographics

Methodology

Evive administered this online survey to a national panel on April 11, 2020. 750 respondents comprised a representative sample of gender, age, and state.

Demographics

Respondents by gender | Male: 289 | Female: 461

Respondents by age group | 18-24: 57 | 25-39: 302
40-54: 241 | 55-64: 100 | 65+: 50

Respondents by employment status | Employed: 346
Actively furloughed: 67 | Unemployed: 337

About Evive

Evive changes the way companies communicate.

As the market leader in data-driven, personalized engagement, Evive has extensive experience helping large and midsize companies contain costs and optimize the employee experience across their diverse populations. Starting with rich healthcare and HR data sources, we use our proprietary predictive analytics and behavioral science expertise to deliver highly segmented, multi-modal messaging that connects the right person to the right resource at the right time: driving individual action and delivering measurable outcomes across the spectrum of employee experiences.

Learn more at **goevive.com**

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