

Pandemic Impact Survey

Healthcare Consumers and Healthcare Professionals

November 2021





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Methodology

- A 15-minute online survey (offered in both English and Spanish) was conducted among:
 - **4,188 Consumers of Healthcare** (U.S. adults ages 18+ who saw a healthcare provider, used any healthcare, or received any prescription medications in the past three (3) years)
 - **602 Healthcare Providers** (201 PCPs, 201 NPs/PAs, and 200 Pharmacists)
- The survey was conducted from September 29 – October 20, 2021

Weighting and Representativeness

- The survey of U.S. adults included quotas/oversamples to have an optimal representation of Black or African American respondents and Hispanic respondents.
- Consumer data were weighted where necessary by age, gender, race/ethnicity, region, education, household income, size of household, and marital status to bring them in line with their actual proportions in the population. HCP data were weighted where necessary by gender, region, race/ethnicity (NPs/PAs and Pharmacists only), work status (NPs/PAs and Pharmacists only), specialty and duration of practice (PCPs only). No estimates of theoretical sampling error can be calculated.



Notation Guide

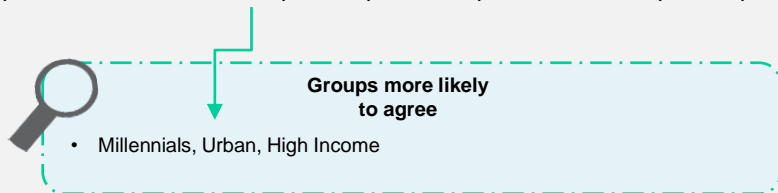
Please refer to this slide for explanations of the various notations and formatting used throughout this deck:



Flags in the top corner of each slide indicate the respondent groups that have data displayed on each slide.

Subgroup Callouts:

Indicates groups that are statistically more likely to agree with or select a particular statement or response option, compared to their respective peers

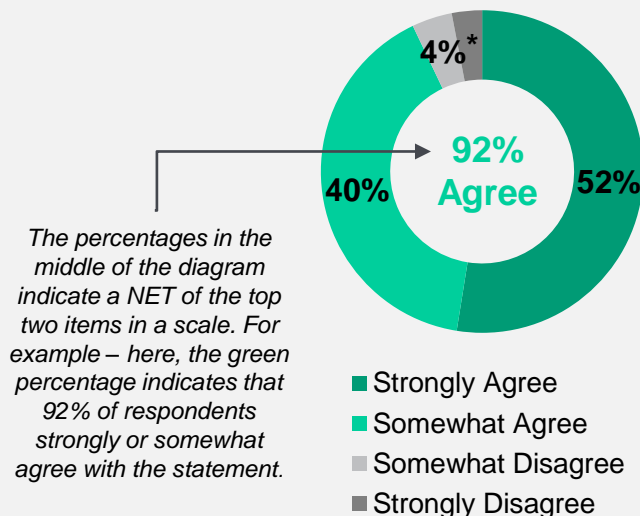


Significance Indicators:



Indicates group that is statistically more likely to agree with or select a particular statement or response option.


Scale NET Notation:





Healthcare Consumer Subgroup Analysis

Throughout this deck, statistically significant differences by the following subgroups of interest are identified by callouts. Note that due to space limitations, not every significant difference among these groups of interest are displayed; some that were thought to be less interesting were omitted. Statistical significance testing was conducted at the 95% level of confidence. All comparative claims made in this report are statistically significant.



Consumer Subgroup Analyses:

Gender		Age	
Male n= 1,985		Gen Z (18-23) n=267, Millennials (24-39) n=1,072	
Female n=2,203		Gen X (40-55) n=985 Boomers (56-74) n=1,516	
Ethnicity	Region	Household Income	
White n= 2,615	Northeast n=754	Less than 25K n= 658	
People of color n=1,573	South n=1,744	\$25K-<\$50K n=887	
Hispanic n=639; Black n=607	Midwest n=871	\$50K- <\$75K n= 831	
Asian n=230; Other n=97	West n=819	\$75K+ n= 1,753	
Parent of Child n=1,399		Urbanicity	
Patient n=3,020		Urban n=1,535	
Caregivers n=1,635		Suburban n=1,814	
		Rural n=839	



Executive Summary



Key Takeaways

Insight #1: Access Barriers Impact The Most Vulnerable

- A fourth of all healthcare consumers have trouble accessing high quality healthcare services from a physician or a facility near them - the level of reported difficulty skews towards lower levels of education and income. People of color, patients, caregivers, and people living in urban settings are more likely to report difficulty than their counterparts.
 - For nearly one-fourth of those facing access issues, it takes a minimum of 30 minutes to reach the nearest ER facility. And for close to a tenth, it takes 60-minutes or more.
- Those facing access issues are far more likely to delay or cancel a healthcare consultation for an adult or child in the household (cancel or delay an adult visit 70%-77%; child visit 72%-77%) compared to those who do not (cancel or delay an adult visit 36%-49%; child visit 47%-53%).
- Compared to consumers mentioning 'easy' access, those experiencing difficulty are significantly more likely to be:
 - Female (54%)
 - People of Color (34%)
 - Patients (74%)
 - Diagnosed with Anxiety (29%) and Depression (25%)
 - Caregivers (59%)
 - Parents (43%)
 - Lower Income (34% <\$25K; 27% - \$25K-\$50K)
 - Lower Education (39% high school or less; 25% some college degree)



Key Takeaways

Insight #2: With The Rising Prominence Of Telehealth Up To Half Of Low-Income Patients May Be Left Behind

- In-person visits remained more prevalent. On average, in-person consultations were used 4.7 times compared to 2.5 telehealth visits since the beginning of the pandemic. Telehealth visits are more common among high income, high education and urban segments.
- While a fourth of healthcare consumers claim to have used telehealth services prior to the pandemic, nearly half (45%) mentioned increasing its usage since the pandemic began in March 2020. A fifth of healthcare consumers also mentioned reducing in-person visits during the same period.
 - Most healthcare consumers (58%) are likely to continue telehealth visits even after the pandemic (with a fourth of them 'very likely' to continue).
- Among physicians, telehealth consultation increased 7 to 9 times (from 5% of total consultations in the pre-pandemic era to 34% during and 46% at the height of the pandemic).
 - Like healthcare consumers, three-fourths of physicians and over half of pharmacists say they are likely to continue offering telehealth consultations even after the pandemic.
- Although virtual consultations help bridge the gap, telehealth is still not for everyone - 36% - 54% of HCPs say that patients from low-income households have limited access.



Key Takeaways

Insight #3: COVID-19 Caused Care Delays, Non-Compliance And Overall Health Decline (Particularly Mental Health) Due To A Combination Of Factors - Access And Safety Concerns Being The Biggest Barriers

- About 70% of healthcare consumers are diagnosed with conditions that require regular health management and care.
 - Hypertension, anxiety, and depression top the list of diagnosed conditions. Mental health conditions (anxiety and depression) are reported more among Hispanic, women, younger, lower Income and lower education segments. Hypertension is seen more among Black/African Americans.
 - A vast majority (80% and more) of healthcare professionals report an increase in new diagnoses of mental health conditions since the pandemic began; 60% also mention worsening conditions among pre-diagnosed patients.
- Over 1 in 10 healthcare consumers feel their health has worsened since the pandemic began; meanwhile, ~4 in 10 HCPs believe conditions have worsened in the patients they see.
 - Among healthcare consumers, patients, women, younger, lower income and lower education segments report worsening health conditions significantly more.
- 1 in 2 healthcare consumers are also more concerned about their health today than before. Patients, caregivers, people of color, parents, and higher educated individuals are likely to be more concerned about their health today.
 - Among NPs/PAs (65%) and pharmacists (63%) concern is even higher (significantly more so) about the health of their patients. Physicians are more (44%) or as concerned as before (51%).
- About 1 in 2 healthcare consumers say they postponed or canceled healthcare services since the pandemic began - dental care, routine exams, annual health checks were most often avoided.
 - Concerns about COVID-19 exposure are cited as the primary reason for avoidance of healthcare.
- According to physicians, incidence of healthcare avoidance is even worse – and near-universal among patients since the beginning of the pandemic.
 - Furthermore, while 47% of physicians experienced a decrease in routine visits, 59% report increases in mental health consultations.



Key Takeaways

Insight #4: The COVID-19 Pandemic Also Caused Pharmaceutical Access Barriers And Non-Compliance Among Healthcare Consumers

- Overall, three-fourths of healthcare consumers take 1 or more prescription drugs.
 - 1 in 10 healthcare consumers report facing a prescription medication access or shortage problem - this is more of a problem among people of color, younger healthcare consumers, urbanites, and parents.
 - Pharmacists report shortages of OTCs (33%) and prescription drugs (21%) more often than other HCP segments.
- Among all the medicinal adjustment behaviors taken on by healthcare consumers, stocking up on OTC medicines and using home remedies are mentioned most often (33% and 22%, respectively).
 - Among those who delayed filling prescriptions, 25% cite that OTCs and home remedies are equally effective to treat their conditions.
 - Most HCPs (53%-74%) however, attribute medicinal adjustments to affordability.

Insight #5: Healthcare Consumers Increasingly Rely On Alternate Information; Nurses And Pharmacists Play A Larger Part In Providing Care

- Although a majority of healthcare consumers (61%) claim to rely on physicians for information, during COVID, they increasingly turned to the internet, support groups and social media for healthcare information (44% healthcare consumers; 88% HCPs agree).
 - Nearly 40% of healthcare consumers also indicate relying more on nurses and pharmacists for their healthcare needs besides doctors.
 - 1 in 5 healthcare consumers (22% yes mentions) sought information from their insurance providers.



Key Takeaways

Insight #6: COVID-19 Challenges Have Impacted Half Of Healthcare Consumers In Some Shape Or Form; But Some Segments Have Faced The Brunt

- COVID-19 related challenges are mentioned more often by people of color, parents, patients and caregivers.
- Healthcare system disparity sentiments are higher among Black Americans, women, younger and lower income groups.
 - And HCPs report even worse disparity than is perceived by the healthcare consumers themselves.
- The financial impact of the pandemic is also more pronounced among Hispanic, urban, and lower income/ educated segments.

Insight #7: Healthcare Consumers And HCPs Likely To Continue Making/Seeing Financial And Safety Adjustments As A Result Of The Pandemic

- Most healthcare consumers (65%) intend to take lower-cost or affordable care options like using OTCs/generics over branded medicine; also looking for smaller or low-cost clinics among other solutions.
- About 60% of healthcare consumers are also likely to continue using telehealth after the pandemic ends.
- Similarly, a majority (over 7 in 10) of physicians are likely to provide telehealth consultation after the pandemic and affordable/ low-cost drug options whenever possible.

Health Impact: People of Color



Consumer Baseline Characteristics



50.5
Average age

Children in HH



Currently Taking Prescription Medication

68% I am currently taking 1 or more prescription medications

12% An adult in my care

8% My child

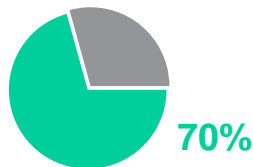
51%
Female



49%
Male



Patient / Chronic Condition (any)



Overall Health

Compared to before the beginning of the COVID-19 pandemic

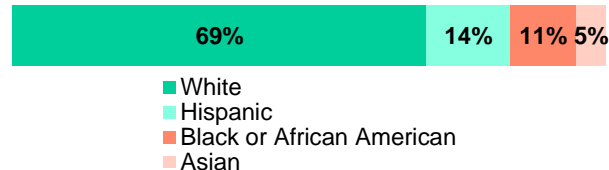
26%
Better



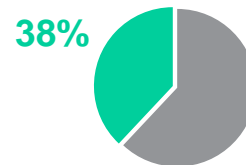
15%
Worse

59%
Same

Race



Caregiver



Concerned About Health

Compared to before the beginning of the COVID-19 pandemic

46%
More concerned



13%
Less concerned

41%
Equally as concerned



People of Color Face Higher Access, Economic And Educational Barriers

Compared to White Americans, tend to be younger, women, and with children in the household.
They are also likely to be less educated (twice as likely to have HS degree or less) and from lower-income households.

More likely than White Americans to have received various financial assistance in 2020/2021 including :

- 25% received unemployment benefits (vs. 17% White Americans)
- 30% are on SNAP (compared to 18% White Americans)
- 34% have coverage through Medicaid (vs. 23% White Americans)

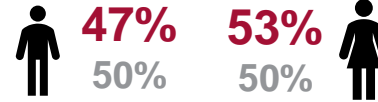
More concerned about their health now (52%) than before the pandemic, vs White Americans (43%)

- Concern is higher among patients (POC 56% vs. White Americans 46%)
- Patients also feel worse now than prior to the pandemic (POC patients 22% vs. White patients 17%)

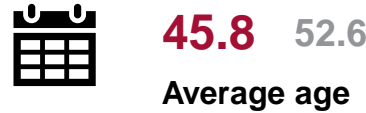
Report similar levels of diagnosed conditions and are more likely to be caregivers (42%) than White Americans (36%)

- Hypertension is significantly high among Black adults while Hispanic adults suffer more from Anxiety, Diabetes, Auto-immune diseases, and PTSD

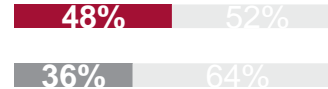
Access to a good quality doctor or healthcare facility is significantly more difficult for this segment (34%) compared to White Americans (19%)



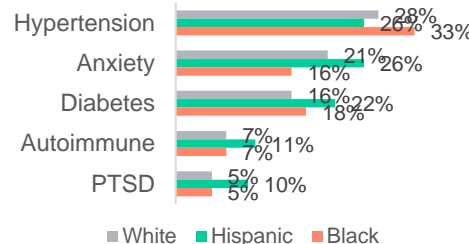
Male Female



Children in HH



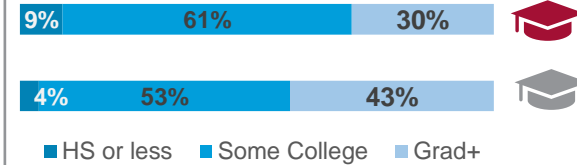
Notable Chronic Conditions



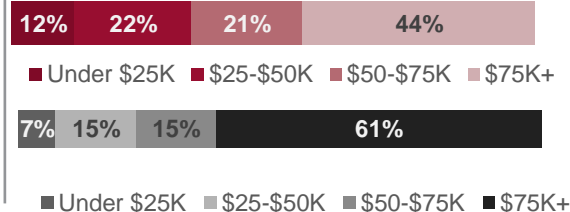
Access To Quality Healthcare Service/Facility



Education



Income



44%

35%

14%

7%

Hispanic

Black

Asian

Other



COVID-19 Hits Harder And Magnifies Challenges In This Segment

Loss of income significantly higher compared to White Americans:

- 25% reported hours cut (vs. 17% White Americans)
- 21% laid off, Furloughed or lost jobs (vs. 12% White Americans)
- 13% lost or had to give up health insurance (vs. 8% White Americans)
- 23% unable to pay rent/mortgage (vs. 15% White Americans)
- 21% unable to buy enough food (vs. 14% White Americans)

Faced higher difficulty in accessing healthcare (35% vs 25% White Americans) and medications prescribed to them (20% vs 14% White Americans). 1 in 3 looked for more affordable health insurance (vs 1 in 5 White Americans)

Patients less likely (73%) to take a prescription medication compared to their White counterparts (83%)

COVID-19 challenges, including lack of access, affordability of treatment and supply shortage hit this segment more as 57% mention experiencing one or more of the challenges (compared to 48% White)

Hispanic adults personally experience COVID-19 more while Black adults feel more negative about systemic differences

Experience during COVID-19

% Yes

Unable to pay rent/ mortgage **23%** 15%

Unable to buy/provide enough food **21%** 14%

Lost/ gave up health insurance coverage **13%** 8%

Patient & Currently Taking Prescription Medication

I am currently taking 1 or more prescription medications **73%** 83%

No, not taking any prescription medication **12%** 9%

Impacted By COVID-19

% Yes

Prevented from seeing a doctor/accessing healthcare **35%** 25%

Sought more affordable health insurance coverage **29%** 19%

Prevented from getting medication prescribed **20%** 14%

COVID-19 Challenges (Notable Differences)

% Selected

Limited access/ Lack of healthcare facilities **13%** 10%

Financial difficulties in paying for the care **13%** 9%

Supply shortage of the medication prescribed **10%** 7%

ANY
57%
48%

I have personally had COVID-19 **35%**

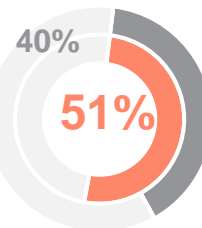
Someone in my household had COVID-19 **42%**



Hispanic

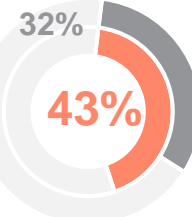
A close friend, family member, or loved one passed away due to COVID-19 **41%**

The system is NOT working fairly across communities when it comes to health care access



Feel like the US healthcare system doesn't care about people like me.

Black





Causing Further Medical & Pharmaceutical Disruption

People of color have delayed (64% vs. 53% White Americans) and/or cancelled (50% vs 41% White Americans) healthcare services more often

- Hispanic adults in particular cite affordability (18% compared to White Americans 12%), lack of childcare (14% vs 7% White Americans), inability to take time off (18% vs 9% White Americans) as reason for delays and cancellations

Also, less likely to fill a prescription (17% vs 13% White Americans) and adjust drug doses including:

- Stocking up on OTCs (37% vs 29% White Americans)
- Using home remedies instead of seeing an HCP (28% vs 20% White Americans)

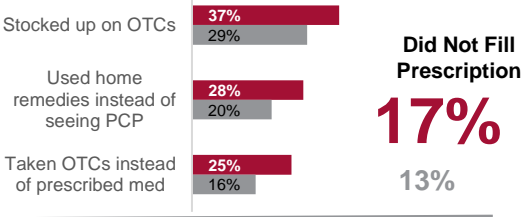
Increasingly relying on other healthcare providers (nurses and pharmacists - 46% vs. 36% White Americans) and turning to social media and internet more for info/ resources (52% vs 40% White American)

Rely more on Insurance provider, PCPs and pharmacists to help recommend affordable and accessible medication

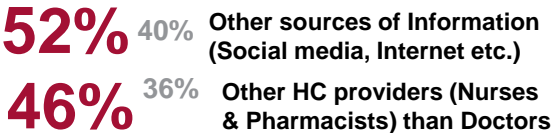
Intend to use Digital apps and Telehealth more going forward (63%) compared to White Americans (56%)

1 in 5 intend to use OTC/generics and visit low cost/ free clinic

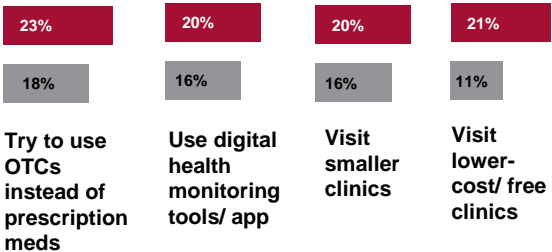
Top Pharmaceutical Adjustments



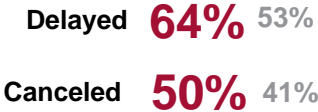
Since COVID-19 Relying More On



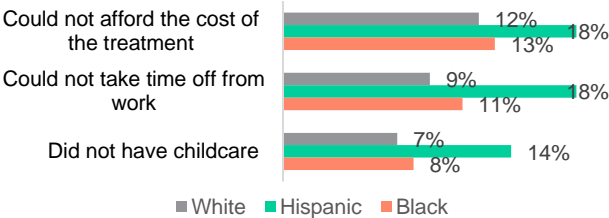
Intend To Do After The Pandemic



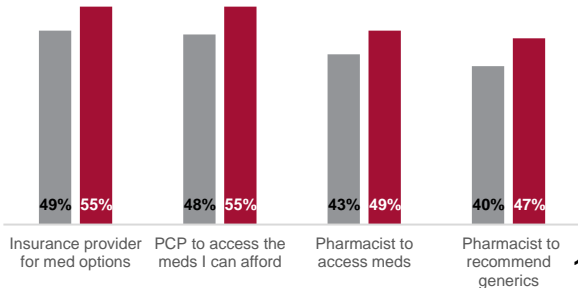
Delayed/ Postponed Adult HC Visits



Reasons For Delay



Relying A Great Deal/ A Lot On

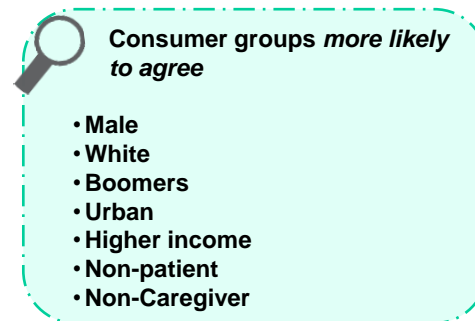
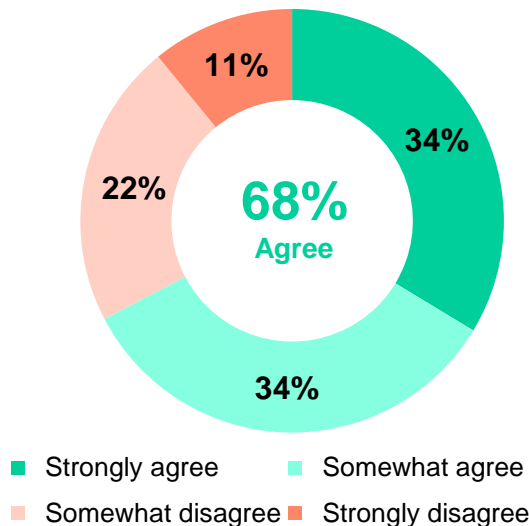
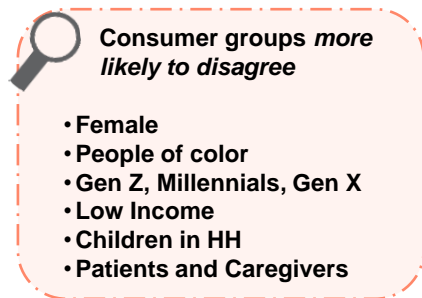


Impact Of Pandemic On Healthcare – Access Barriers



A Third Of Healthcare Consumers, Especially Women, Patients, Caregivers, Younger, Low-Income Households And People Of Color Say COVID-19 Has Impacted How They Access Healthcare

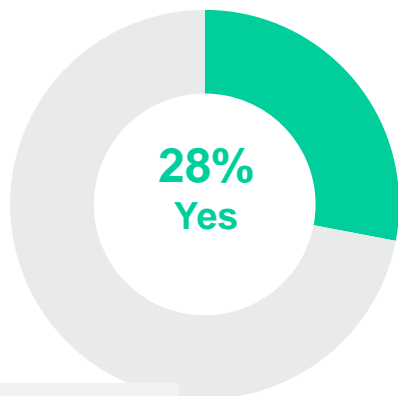
“The COVID-19 pandemic has not impacted how I access healthcare.”





COVID-19 Prevented 1 In 3 Consumers From Accessing Healthcare; A Fifth From Getting Medications, While A Sixth Had To Look For Affordable Insurance

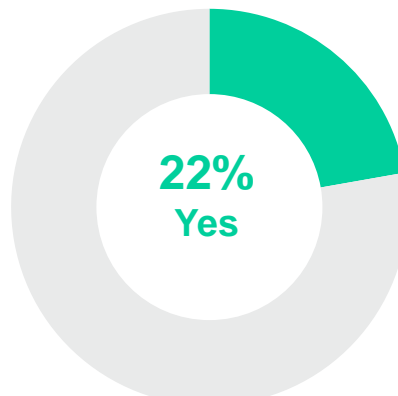
“COVID-19 has prevented me from seeing a doctor or accessing healthcare services when I have needed care during the pandemic.”



COVID-19 prevented many of the patients we see from getting the care they needed during the pandemic.

HCP
85%
Agree

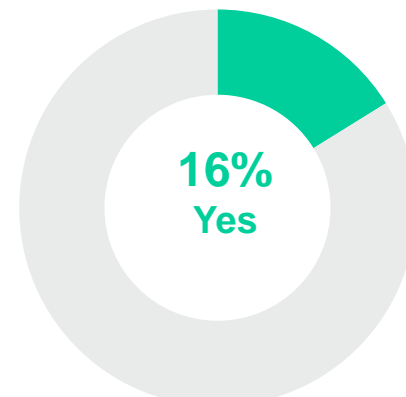
“I have sought more affordable health insurance coverage during the COVID-19 pandemic.”



Patients have sought more affordable health medications during the COVID-19 pandemic

HCP
66%
Agree

“COVID-19 has prevented me from getting medication that my doctor or healthcare provider prescribed.”



COVID-19 has prevented many of the patients we see from getting their prescription medication filled.

HCP
57%
Agree



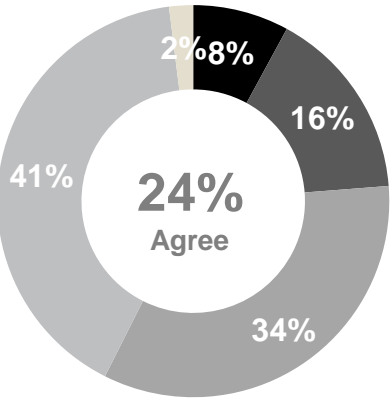
Groups more likely to agree with these statements

- People of color
- Millennials
- Patient & Caregiver
- Parent of a child
- Higher income
- Higher educated

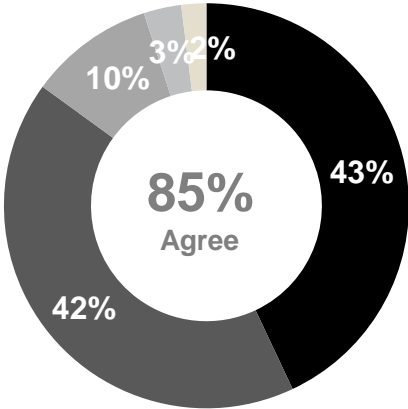


Vast Majority Of Physicians Believe COVID-19 Impacted Access For Patients They Treat

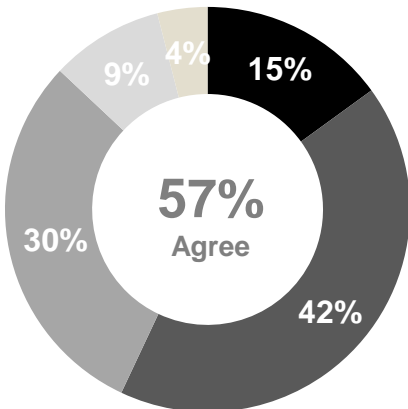
“The COVID-19 pandemic has not impacted healthcare access for my patients.”



“COVID-19 prevented many of the patients we see from getting the care they needed during the pandemic.”



“COVID-19 has prevented many of the patients we see from getting their prescription medication filled.”

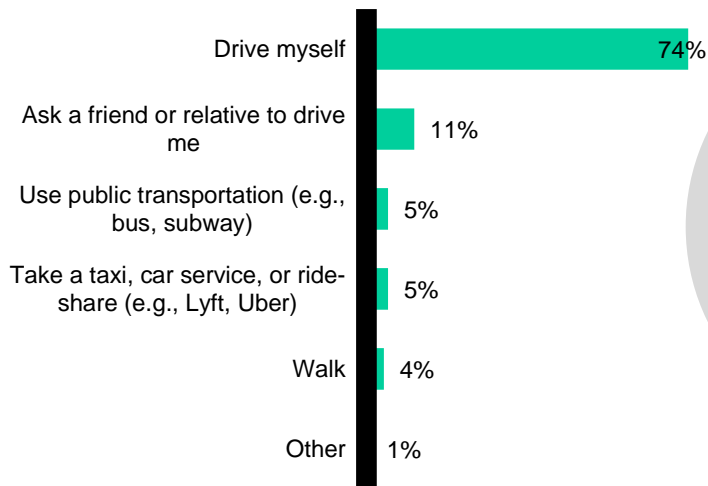


- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Not applicable

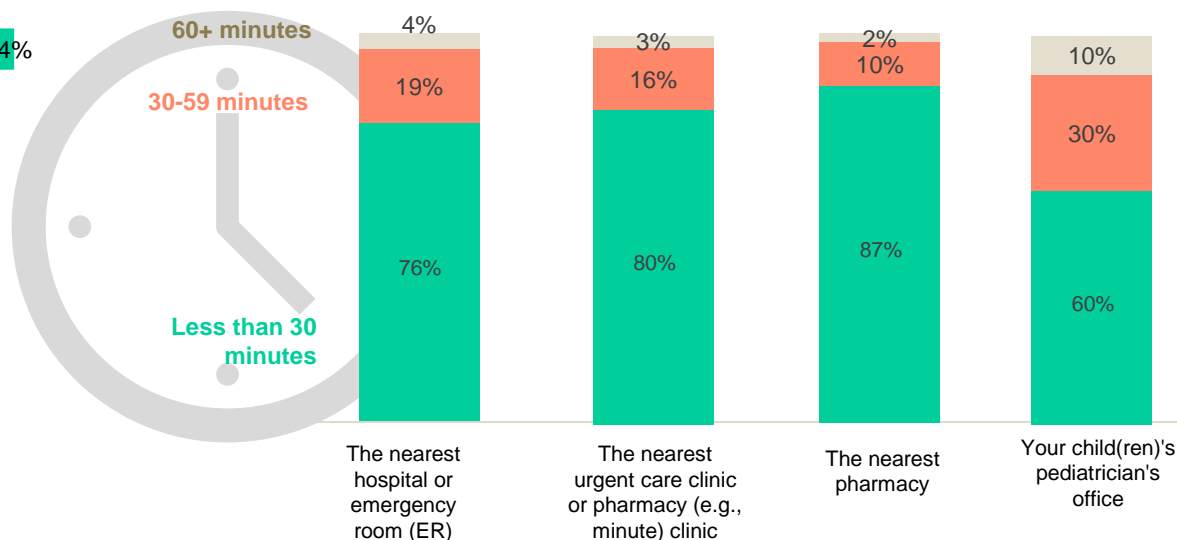


For A Fifth Of Healthcare Consumers, It Takes 30 Minutes Or More To Reach The Nearest ER Or Urgent Care Facility

Accessing Healthcare



Time It Takes To Access Healthcare



BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n= 4188

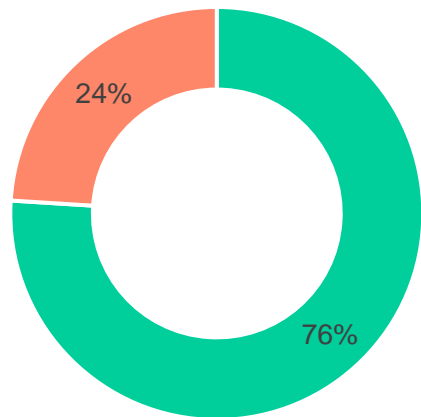
Q704 If you needed to see a doctor or access healthcare, how would you most likely get there?

Q706 Approximately how long would it take you to reach each of the following from where you live? If you are not sure, please provide your best estimate.



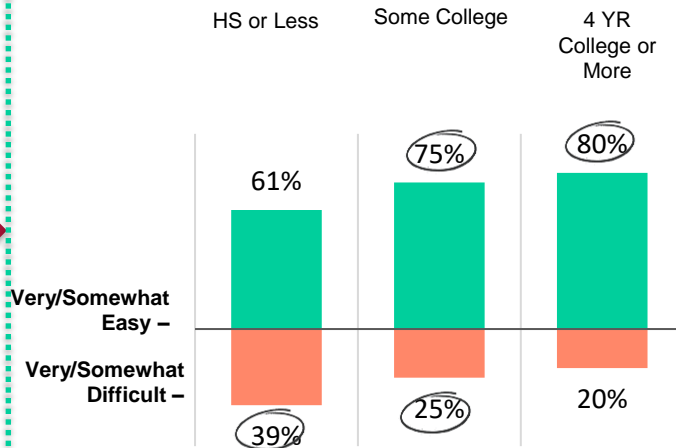
1 In 4 Healthcare Consumers Experience Difficulty Accessing High-Quality Healthcare; Difficulty Is Inversely Related To Income and Education Levels

Ease of Access to Quality Healthcare

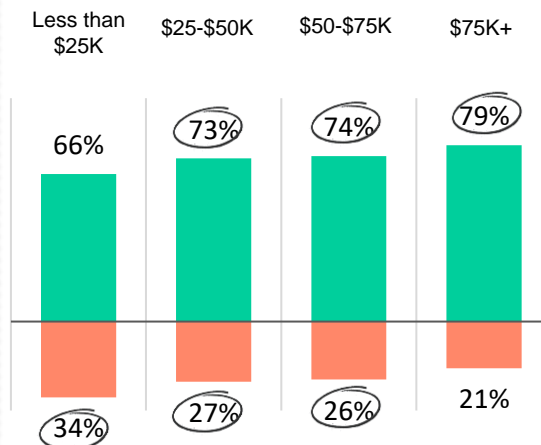


Very/ Somewhat Easy
Very/Somewhat Difficult

By Education



By Income



Other Groups *more likely to experience higher difficulty of access* are:

- People of color; Caregivers; Patients; Urban

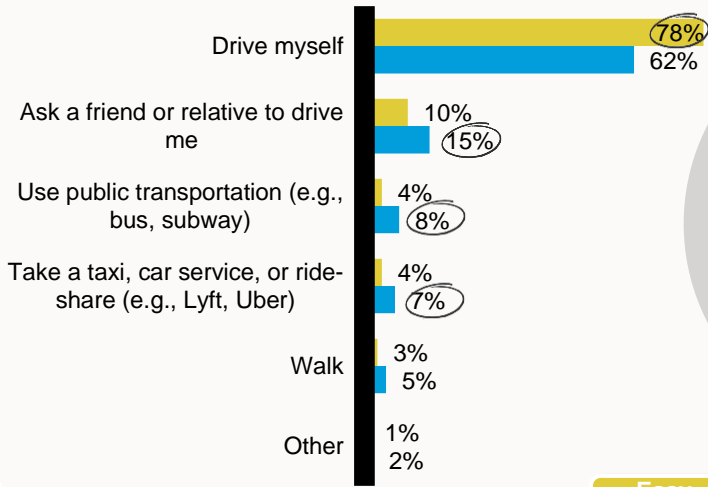


For Over 1 In 3 Healthcare Consumers Facing Difficulty, It Take 30 Minutes Or More To Reach The Nearest ER or Urgent Care Facility

Ease of Access

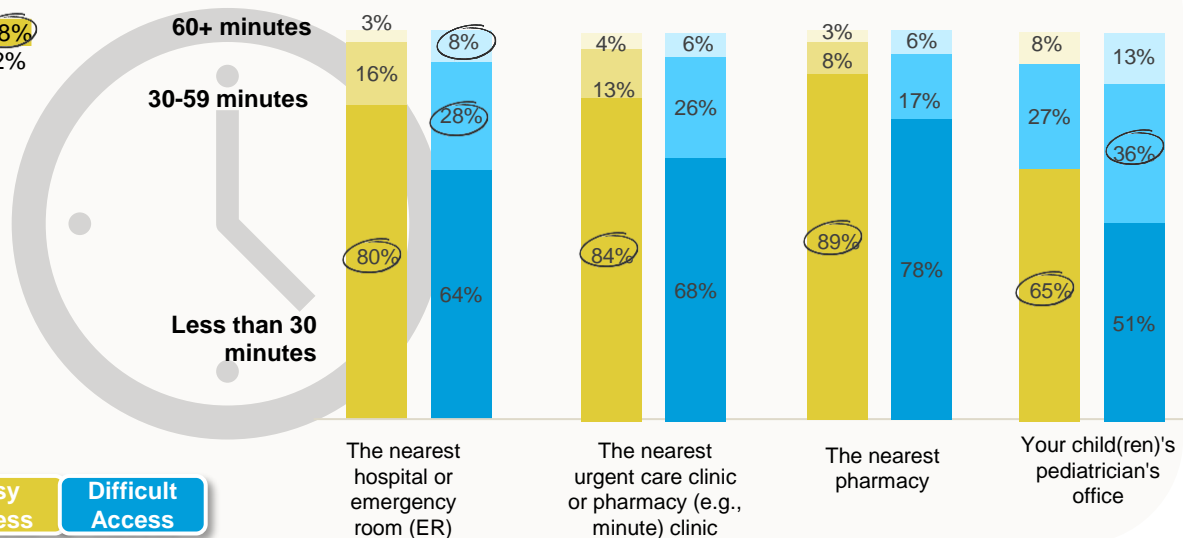


Accessing Healthcare



Easy Access Difficult Access

Time It Takes To Access Healthcare



BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n= 4188 (Easy Access-n=3186/ Difficult Access: n=1002)

Q704 If you needed to see a doctor or access healthcare, how would you most likely get there?

Q706 Approximately how long would it take you to reach each of the following from where you live? If you are not sure, please provide your best estimate.

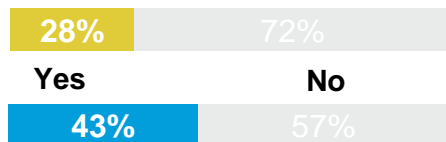


Consumer Baseline Characteristics Differ Significantly By Ease Of Access



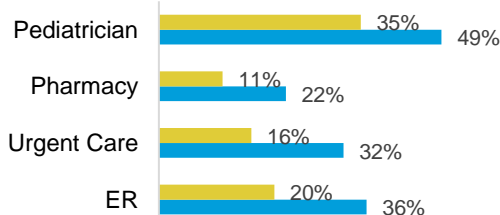
53 **42**
Average age

Parent of Child



Nearest HC Facility

Takes 30 minutes or more to reach

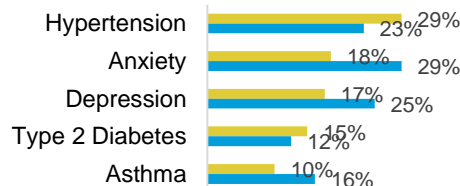


50%
54%
Female

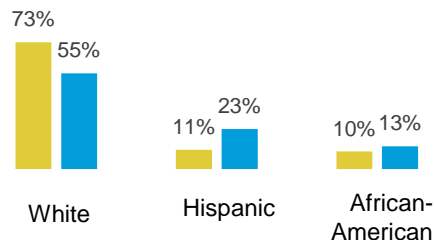


50%
46%
Male

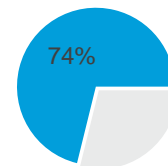
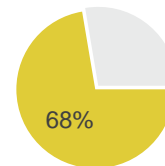
Top Chronic Conditions



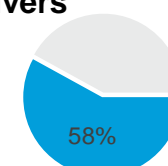
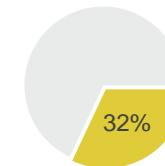
Race



Patients



Care Givers



Delayed/ Postponed HC Visits

Adult Visits

Delayed **49%** **77%**
Canceled **36%** **70%**



Child Visits

Delayed **53%** **77%**
Canceled **47%** **72%**



Telehealth Vs. In-person Consultations

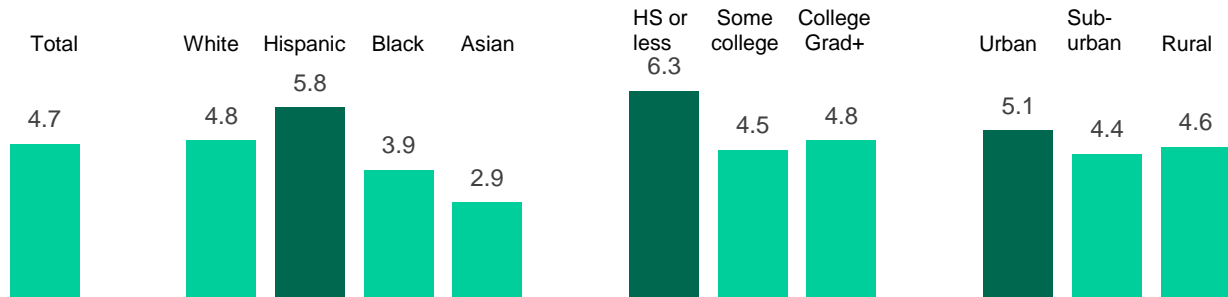


TELEHEALTH vs. IN-PERSON CONSULTATIONS

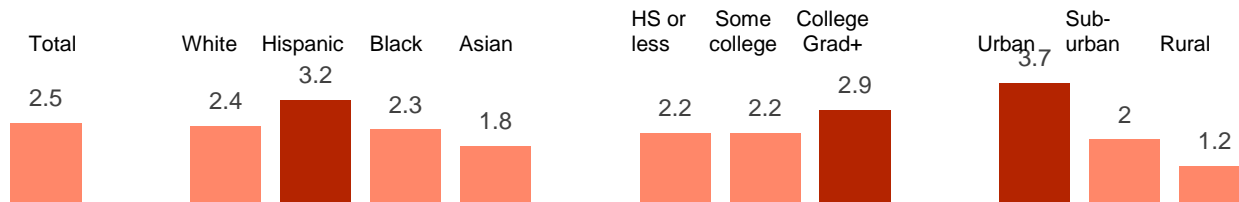
In-person Visits Are Twice As Prevalent As Telehealth; And Are Used More Heavily By High Income, Higher Educated, And Urban Populations

Average Time Visited A Healthcare Provider Since Beginning Of Covid

In-person



Using Telehealth



Groups more likely to use telehealth:

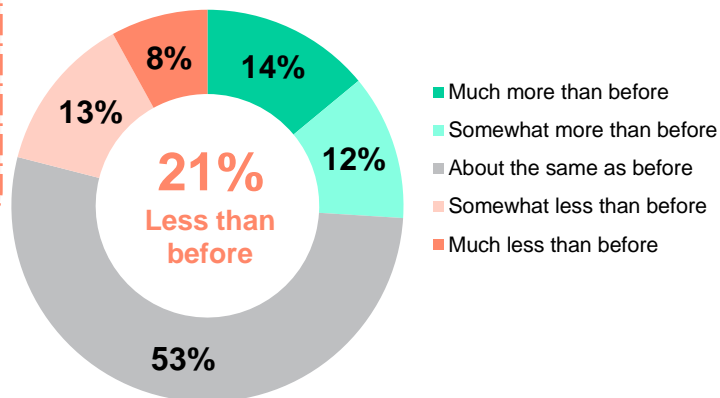
- Millennials, Gen X
- High Income



1 In 5 Consumers Indicate A *Decrease* In In-Person Consultations, While 1 In 2 Indicate Using Telehealth More Since The Beginning Of The Pandemic

Since The Beginning Of COVID-19, Have Seen Or Visited A Healthcare Provider...

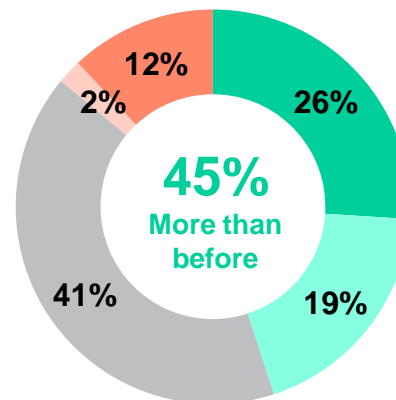
In-person



Groups *more* likely to have seen/visited HCPs *Less* In-Person

- Female
- People of color (Hispanic)
- Low Income

Using Telehealth



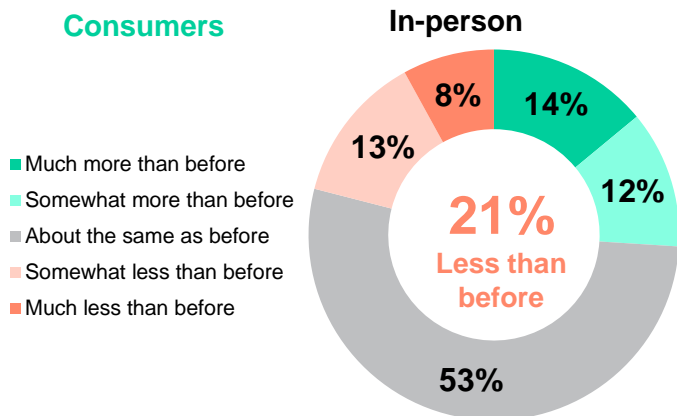
Groups *more* likely to have seen/visited HCP *more* using telehealth

- Male
- Millennials
- Urban
- Higher Income
- Higher Education
- Children in HH/Parent

1 In 5 Consumers Indicate A *Decrease* In In-Person Consultations, While 1 In 2 Indicate Using Telehealth More Since The Beginning Of The Pandemic

Since The Beginning Of COVID-19, Have Seen Or Visited A Healthcare Provider...

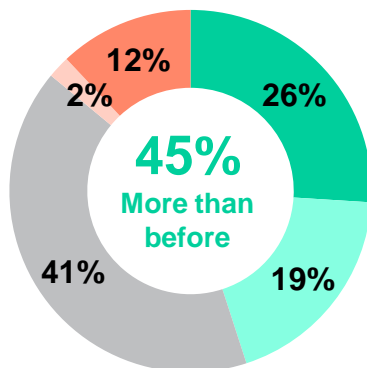
Consumers



Groups more likely to have seen/visited HCPs Less In-Person

- Female
- People of color (Hispanic)
- Low Income

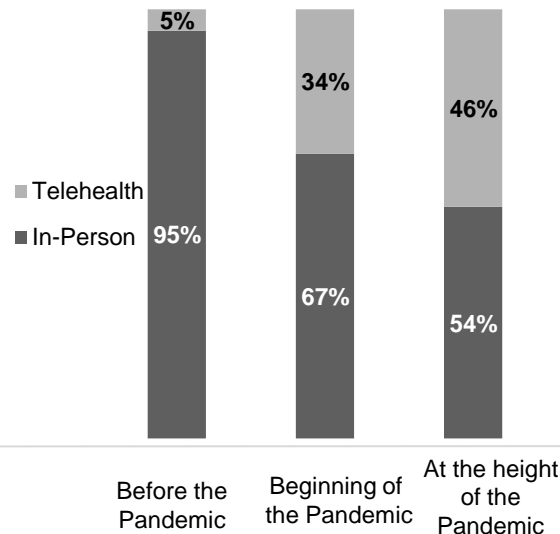
Using Telehealth



Groups more likely to have seen/visited HCP more using telehealth

- Male; Millennials
- Urban
- Higher Income; Higher Education
- Children in HH/Parent

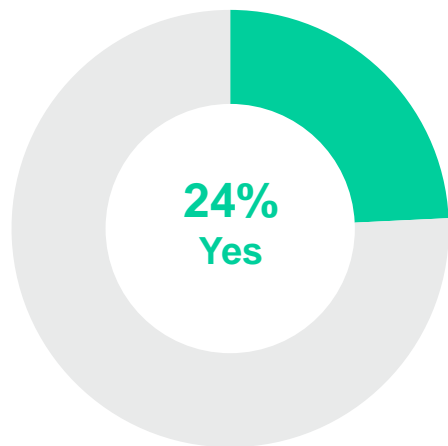
Proportion Of Total Consultations Provided HCPs





Over Half Of Healthcare Consumers Intend To Use Telehealth Going Forward

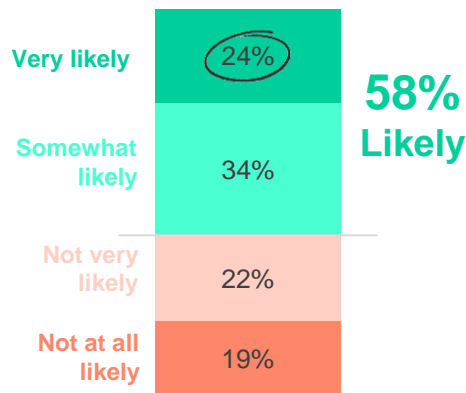
"I was using telehealth/medicine to receive care from a doctor or other healthcare provider before the COVID-19 pandemic."



Groups more likely to have used telehealth before COVID-19

- People of color (Hispanic/Black)
- Males
- Millennial
- Urban
- West Region
- Parent
- Higher income
- Higher educated

Likely To Use Telehealth After The COVID-19 Pandemic



Groups more likely to use telehealth after COVID-19

- People of color (Hispanic/Black)
- Parent
- Males
- Millennial
- Urban
- Higher income
- Higher educated

BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n= 4188

Q740 Which of the following, if any, are true of/for you?

Q718 How likely are you to use telehealth to see/visit your doctor or healthcare provider after the COVID-19 pandemic?

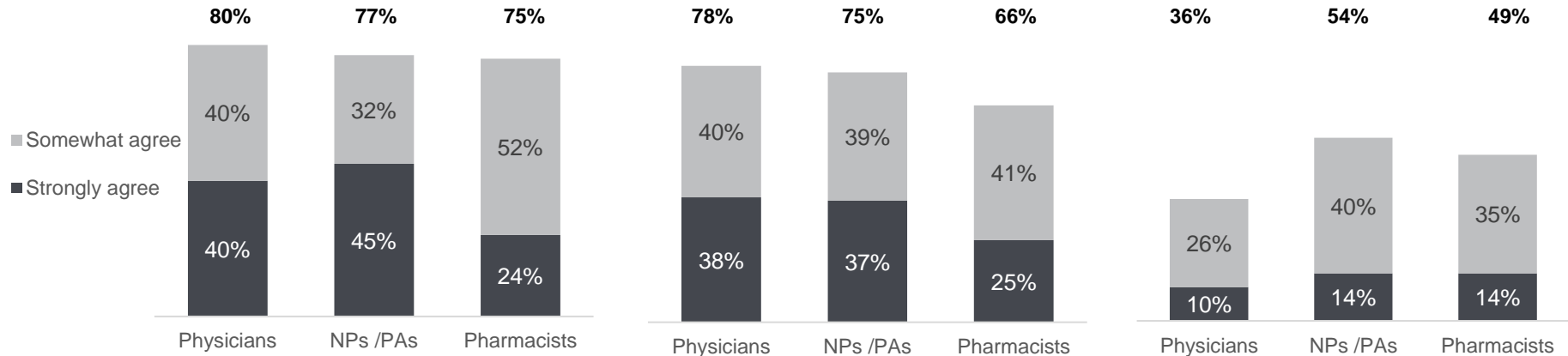


HCPs Uniformly Agree On Benefits And Are Relying More (Esp. Physicians And NP/PAs) On Telehealth To Provide Care, But Over 1 In 3 Report Access To Telehealth Is Still Limited For Low-Income Patients

“Telehealth has helped my patients access the care they need during the pandemic.”

“Since COVID-19, I am relying on other types of healthcare services (e.g., telehealth) now more than even before to help patients get the proper medical care they need.”

“Most of the patients I serve are from low-income households and do not have the means to access telehealth easily (e.g., lack of wi-fi/computers at home).”



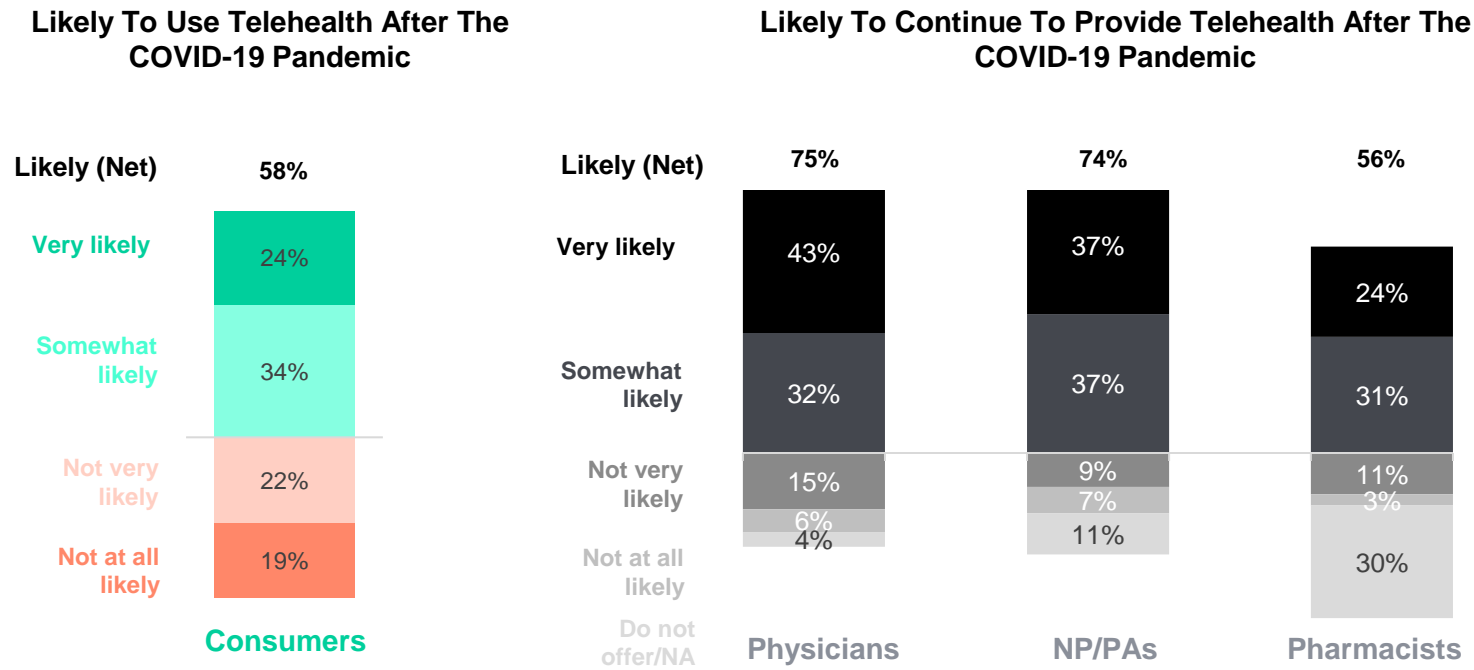
BASE: PHYSICIANS: n=201; NP/PAs: n=201; Pharmacists: n=200

Q921 How much do you agree or disagree with each of the following statements?

Q745_4. How much do you agree or disagree with each of the following statements?



As Seen In Consumers, Three-fourths Of Physicians And Half Of Pharmacists Intend To Provide Virtual Consultations Even After The Pandemic Ends



BASE: HEALTHCARE CONSUMERS n= 4188; PHYSICIANS: n=201; NPs/PAs: n=201; PHARMACISTS: n=200

Q718 How likely are you to use telehealth to see/visit your doctor or healthcare provider after the COVID-19 pandemic?

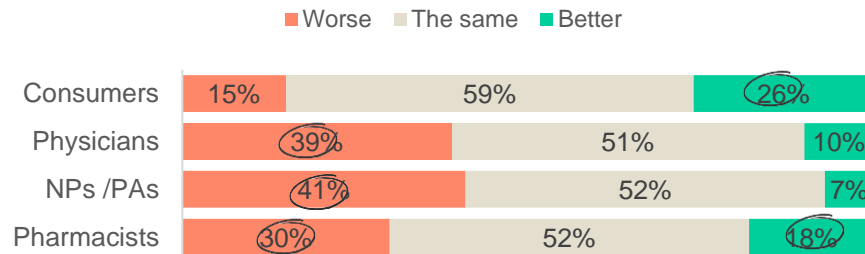
Q935. Looking forward, how likely are you to continue to do each of the following even after the COVID-19 pandemic ends?

Impact Of Pandemic On Chronic And Mental Health Conditions

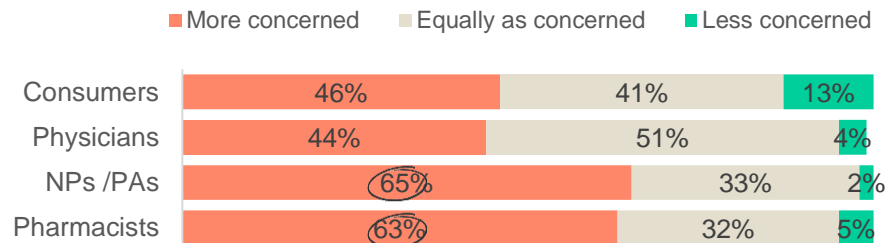


HCPs Are More Likely Than Consumers To Believe Health Conditions Have Deteriorated And Many Are More Concerned Now Than Before The Pandemic

Current Personal/Patient Health vs. Pre-pandemic



Concerned About Personal/Patient Health vs. Pre-pandemic



BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n= 4188; PHYSICIANS: n=201; NP/PAs: n=201; Pharmacists: n=200

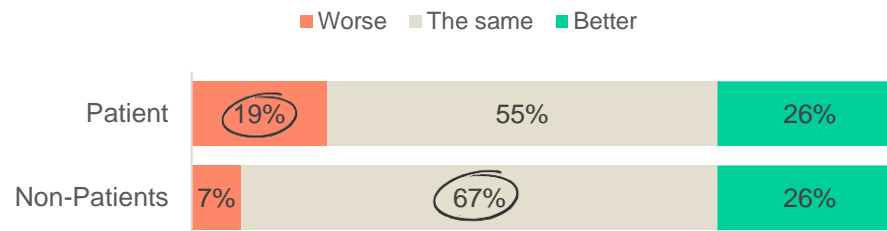
Q608 Compared to before the beginning of the COVID-19 pandemic in March 2020, would you say your current overall health is now...?

Q610 And, compared to before the beginning of the COVID-19 pandemic in March 2020, would you say you are now more, less, or equally as concerned about your health/your patient's health?



Among Consumers, Health Condition And Concerns Vary; Patients And Younger Generations Feel More Negative Than Their Counterparts

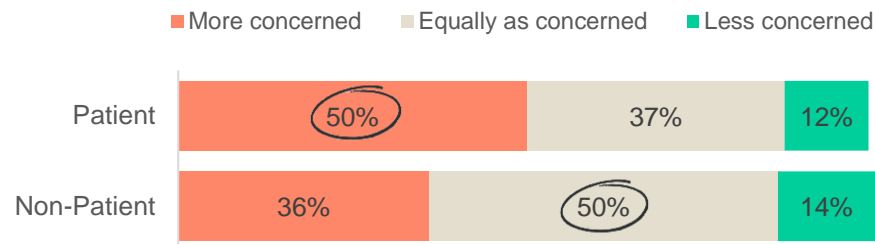
Current Personal Health vs. Pre-pandemic



Groups *more* likely to feel worse:

- Female
- Gen Z, Gen X
- Lower Income
- Lower Education

Concerned About Personal Health vs. Pre-pandemic



Groups *more* likely to be *more* Concerned:

- Gen Z, Millennials, Gen X
- Caregivers
- Urban
- People of color (Hispanic/black)
- Parent
- College Grad+

BASE: PATIENT n=3020/ NON-PATIENT: n=1112

Q608 Compared to before the beginning of the COVID-19 pandemic in March 2020, would you say your current overall health is now...?

Q610 And, compared to before the beginning of the COVID-19 pandemic in March 2020, would you say you are now more, less, or equally as concerned about your health/your patient's health?

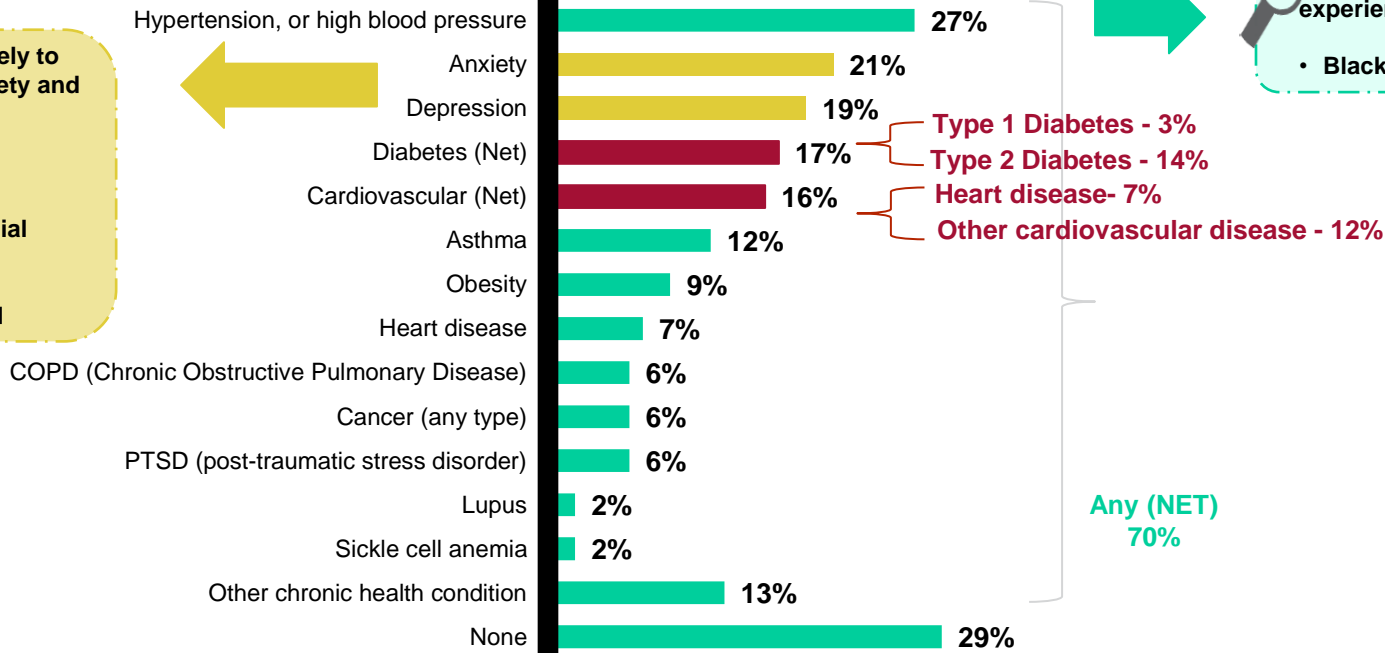


Hypertension, Anxiety, And Depression Top The List Of Diagnosed Chronic Conditions Among Healthcare Consumers

Health Conditions

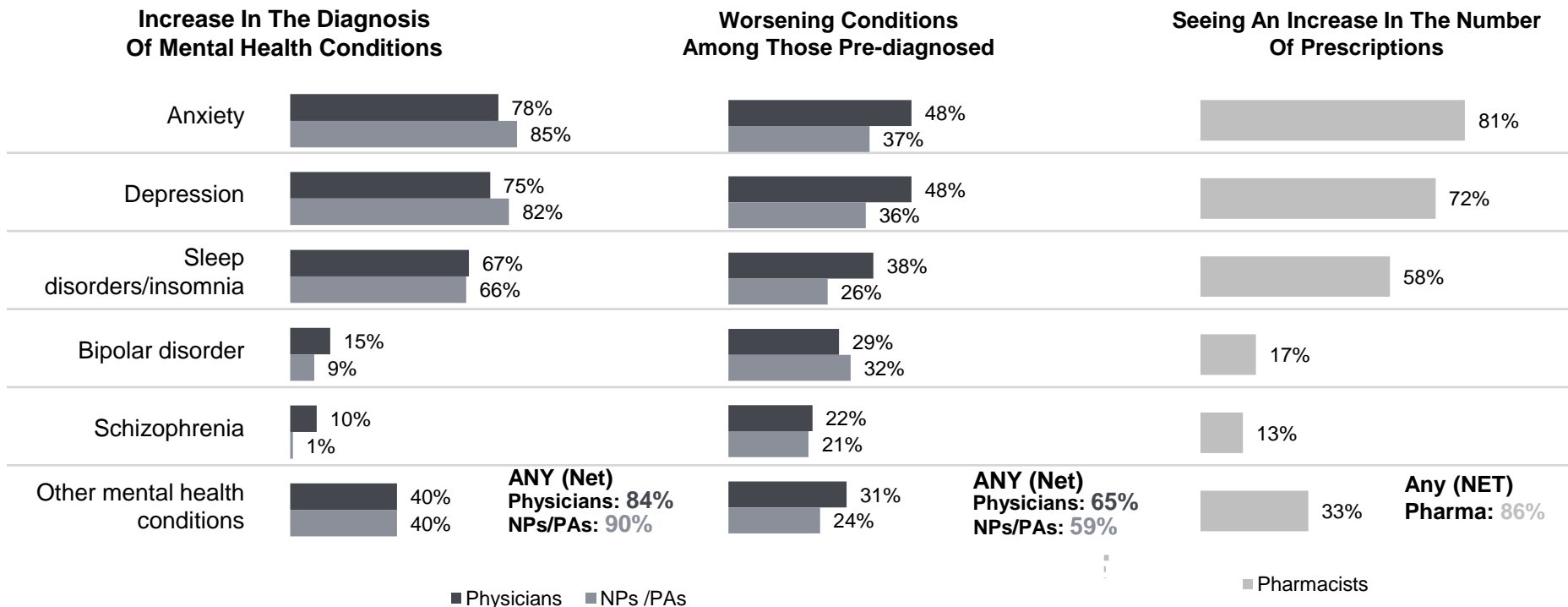
Groups more likely to experience Anxiety and Depression

- Hispanic
- Women
- Gen Z, Millennial
- Parent
- Lower income
- Less educated





Over 8 In 10 HCPs Are Seeing Increases In New Diagnosis/Prescriptions And 6 In 10 Indicate Worsening Of Mental Health Conditions Since March 2020



BASE: PHYSICIANS: n=201; NPS/PAS: n= 201; PHARMACISTS: n=200

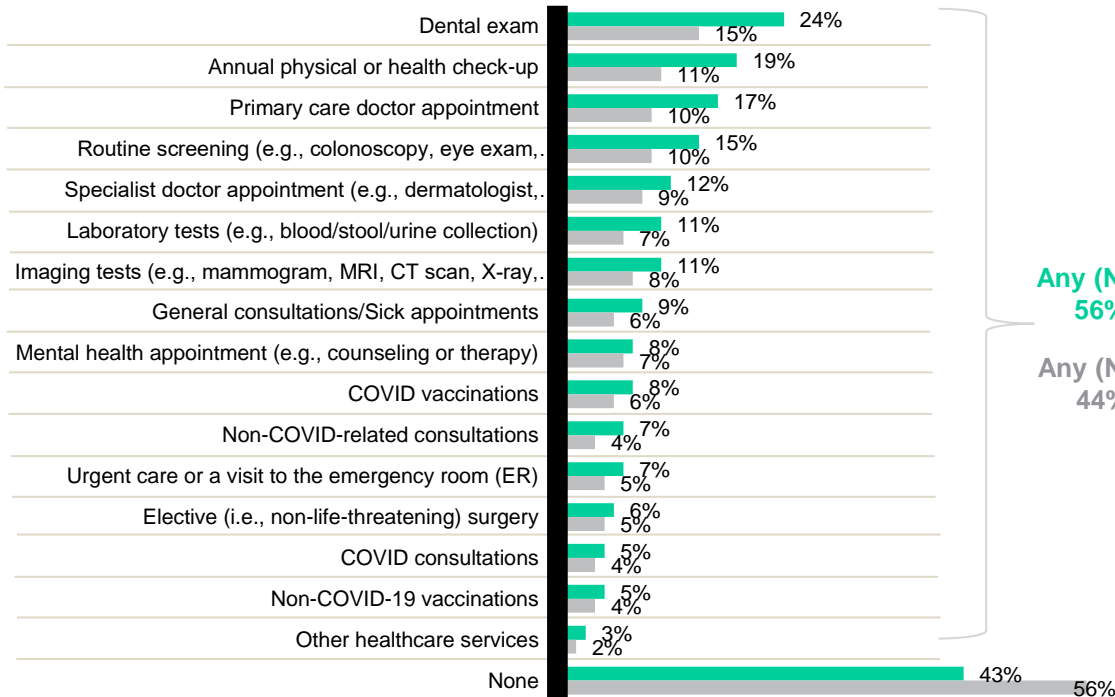
Q640 Compared to before the beginning of the COVID-19 pandemic in March 2020, which of the following mental health conditions, if any, are you seeing an increase in the diagnosis of or worsening among patients that you treat or attend to? Please select all that apply.

Impact Of Pandemic On Healthcare Utilization



Services Were Delayed By Over Half Of Adults And Canceled Entirely By 4 In 10; Dental, PCP, Annual/Routine Exams Have Been Most Frequently Avoided

Postponed/Delayed Or Cancelled/Avoided Entirely Healthcare Services For Self Or An Adult Since The Beginning Of The COVID-19 Pandemic



Groups *more likely* to have postponed/delayed healthcare

- People of color (Hispanic/Black)
- Millennial
- Urban
- West, Northeast Regions
- Parent

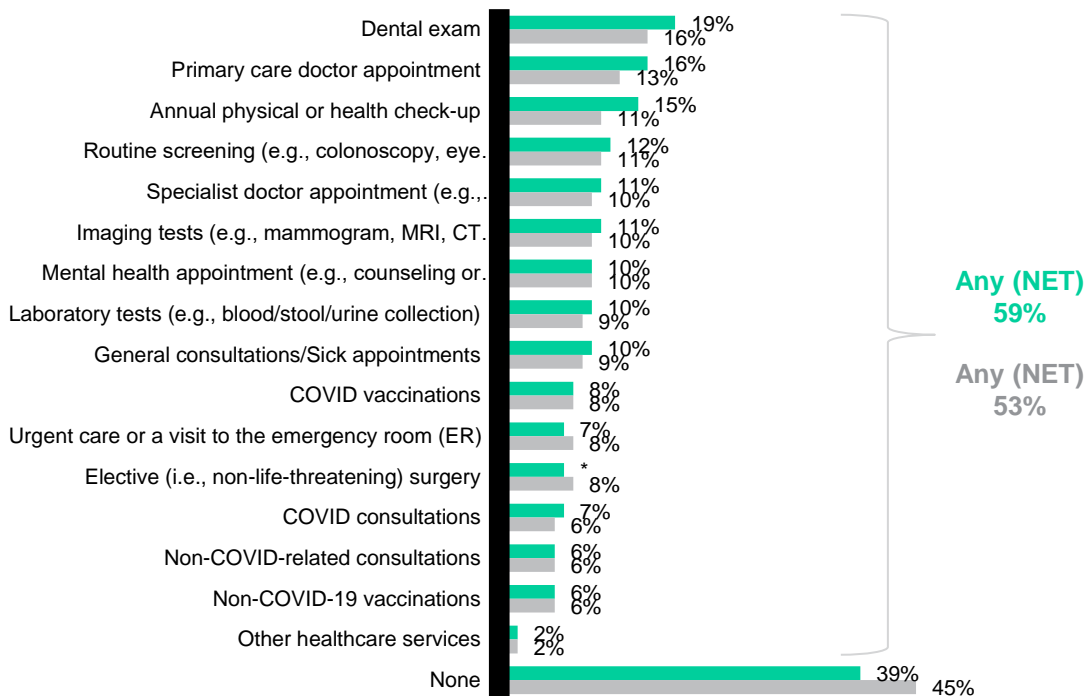
Groups *more likely* to have cancelled/avoided healthcare

- People of color (Hispanic/Black)
- Millennial
- Urban
- Parent
- Lower education



Healthcare Services Were Postponed/Cancelled Slightly More For Children (Than Adults); Dental, PCP & Routine Visits Have Been Mostly Affected

Postponed/Delayed Or Cancelled/Avoided Entirely Healthcare Services For A **Child/Children In HH** Since The Beginning Of The COVID-19 Pandemic



Groups *more* likely to have postponed/delayed healthcare

- Male
- People of color (Hispanic)
- Millennials
- Patients
- Caregivers
- Urban
- Higher Income
- Higher Education

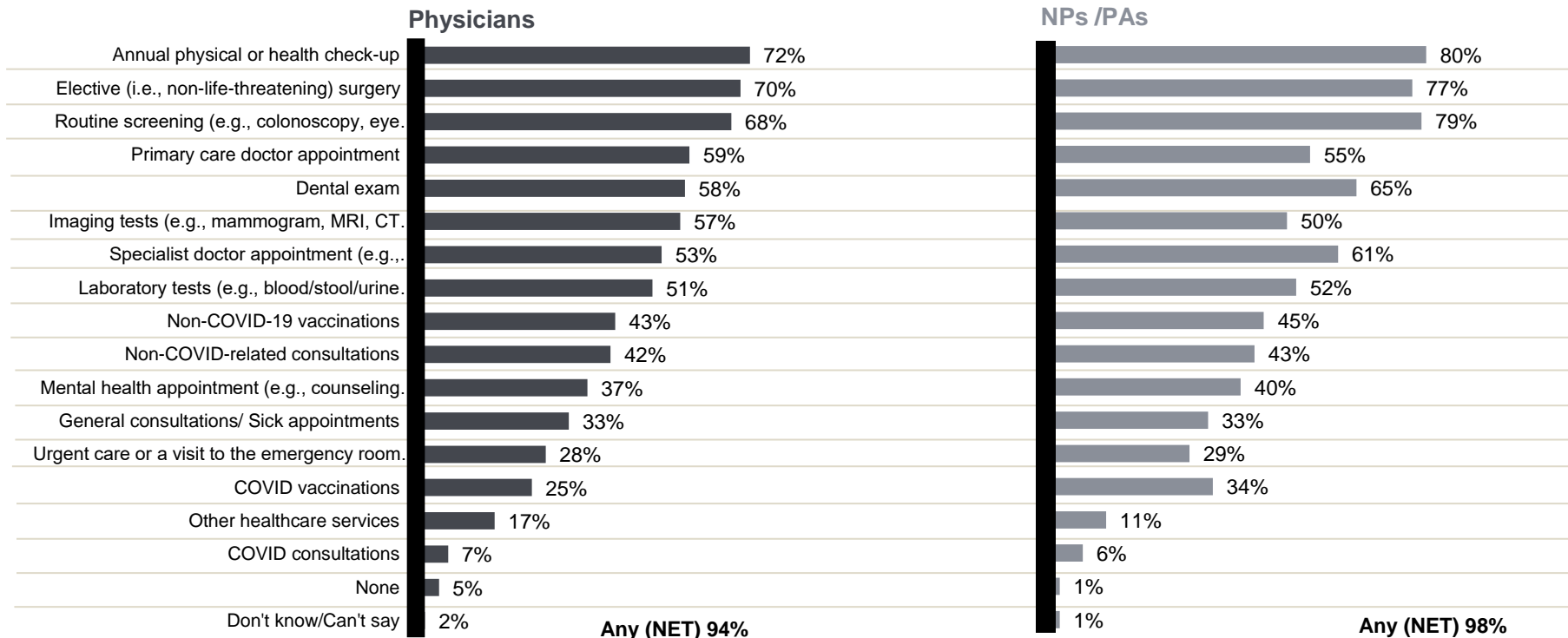
Groups *more* likely to have cancelled/avoided healthcare

- Male
- Millennials
- Patients
- Caregivers
- Urban
- Higher Income
- Higher Education



Nearly All PCPs And NPs/PA Report Delays/Cancellations In Care; Annual Exams, Routine Screening, And Elective Surgeries Top the List

Healthcare Services Postponed Or Avoided Entirely By Patients Since The Beginning Of The COVID-19 Pandemic



BASE: PHYSICIANS: n=201; NPS/PAS: n= 201

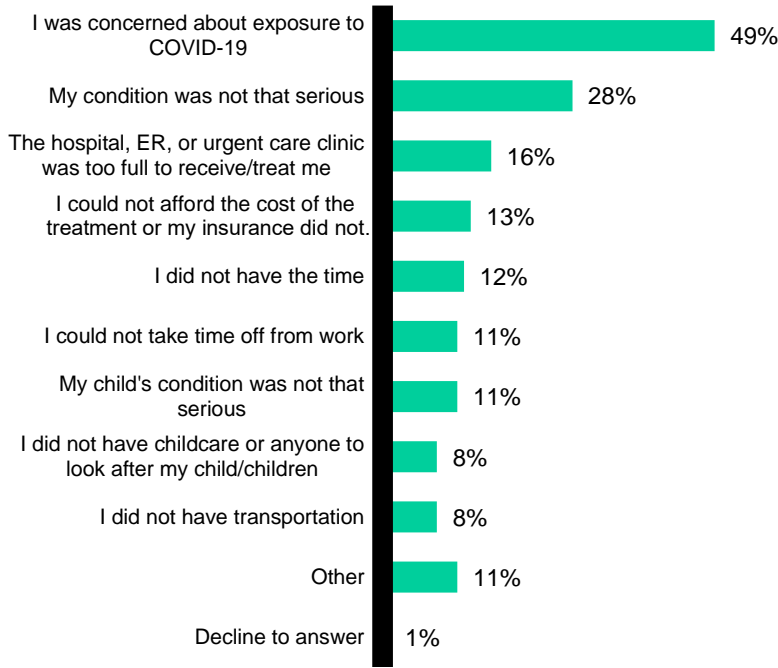
Q720 Based on what you have seen or heard from the patients that you treat or attend to, which of the following healthcare services, if any, are adults postponing or avoiding entirely since the beginning of the COVID-19 pandemic in March 2020? Please select all the apply.



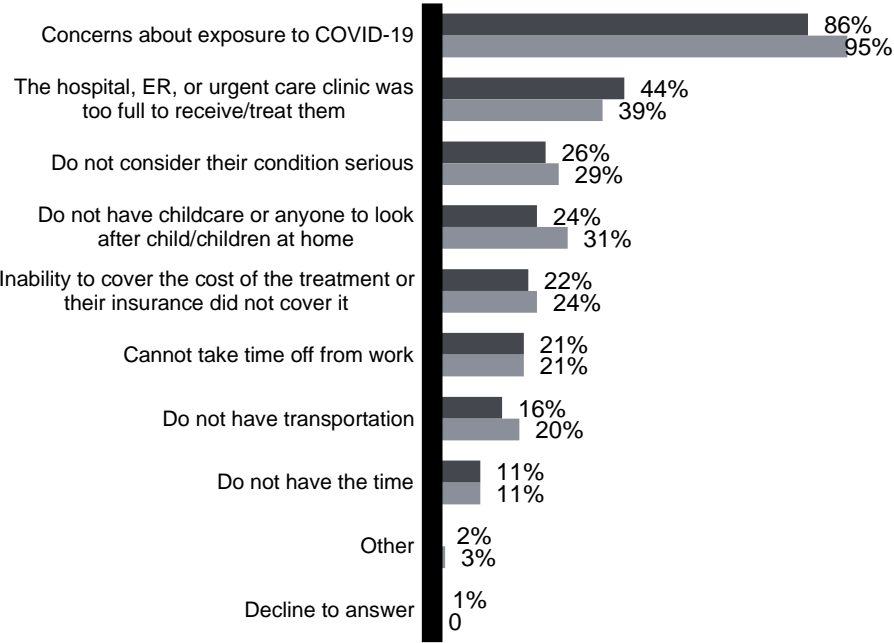
Healthcare Consumers And Providers Cite Similar Reasons For Avoidance Of Care; Concerns Over COVID-19 Prevented Most From Getting Care

Reasons For Postponing/Delaying Or Cancelling/Avoiding Entirely Healthcare Services Since The Beginning Of The COVID-19 Pandemic

Consumers



Physician NPs/PAs



BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188; PHYSICIANS: n=201; NPS/PAS: n= 201

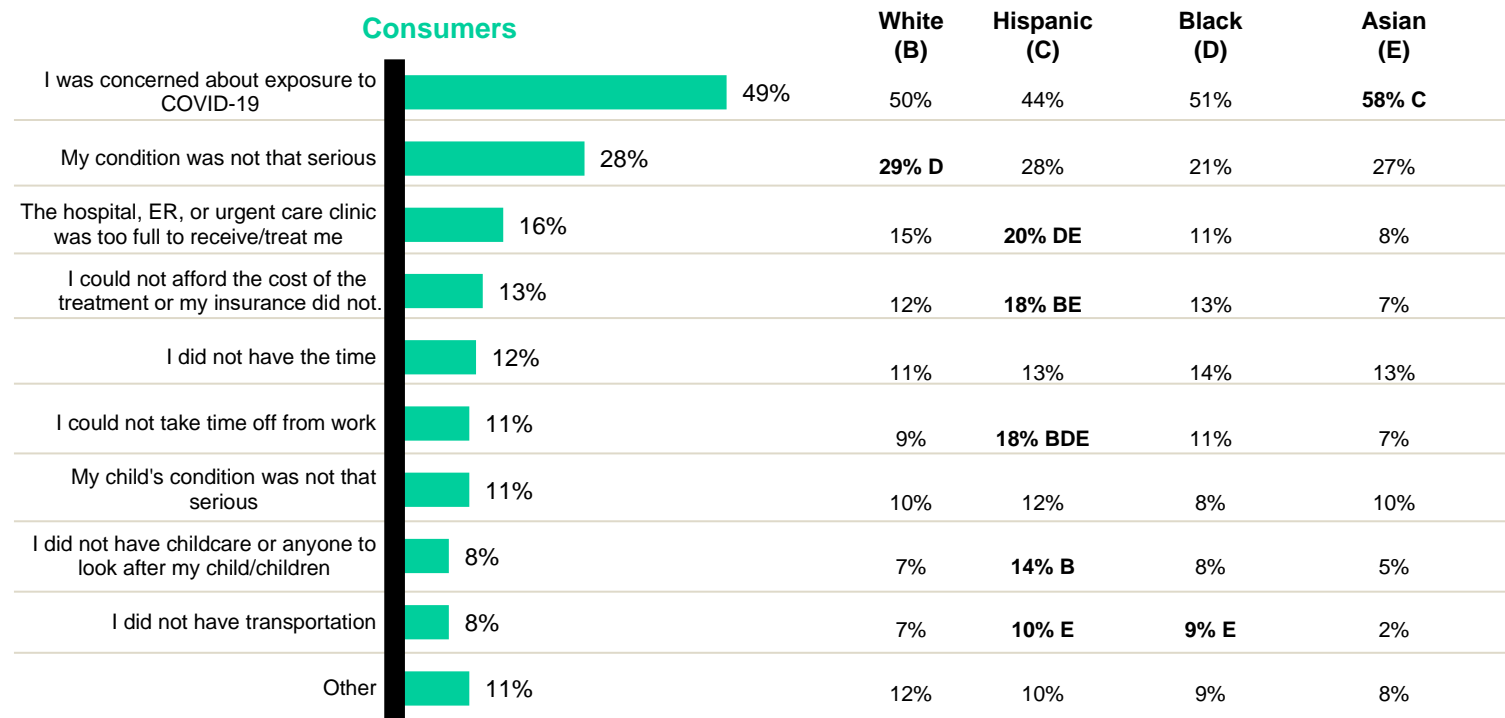
Q730 You indicated that you have postponed/delayed or cancelled/avoided entirely certain healthcare services for yourself/an adult in your care or your child/children or a child in your care since the beginning of the pandemic. Why did you postpone or avoid seeking care? / Based on what you have heard from patients that you treat or attend to, what are the most common reasons for patients delaying or avoiding healthcare services since the beginning of the pandemic? Please select all that apply.



IMPACT OF PANDEMIC ON HEALTHCARE UTILIZATION

Reasons For Avoidance Of Healthcare Services Vary By Race; Hispanic Adults Cite Admission Issues, Affordability, and Work More Than Others

Reasons For Postponing/Delaying Or Cancelling/Avoiding Entirely Healthcare Services Since The Beginning Of The COVID-19 Pandemic



BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188;

Letters indicate significant differences with comparative segments

Q730 You indicated that you have postponed/delayed or cancelled/avoided entirely certain healthcare services for yourself/an adult in your care or your child/children or a child in your care since the beginning of the pandemic. Why did you postpone or avoid seeking care? / Based on what you have heard from patients that you treat or attend to, what are the **most common reasons** for patients delaying or avoiding healthcare services since the beginning of the pandemic? Please select all that apply.



Reasons Also Vary By Income And Education Levels

Reasons For Postponing/Delaying Or Cancelling/Avoiding Entirely Healthcare Services Since The Beginning Of The COVID-19 Pandemic

Consumers		Less than \$25K (B)	\$25-\$50K (C)	\$50-\$75K (D)	\$75K+ (E)	HS or less (F)	Some College (G)	College Grad+ (H)
I was concerned about exposure to COVID-19	49%	46%	49%	50%	49%	42%	49%	51%
My condition was not that serious	28%	21%	27%	27%	28%	19%	26%	31% G
The hospital, ER, or urgent care clinic was too full to receive/treat me	16%	13%	13%	14%	16%	11%	14%	17%
I could not afford the cost of the treatment or my insurance did not	13%	16%	12%	14%	12%	10%	13%	13%
I did not have the time	12%	11%	11%	9%	13%	16%	13%	10%
I could not take time off from work	11%	6%	10%	9%	12% B	10%	11%	11%
My child's condition was not that serious	11%	5%	4%	6%	14% BCD	6%	6%	16% G
I did not have childcare or anyone to look after my child/children	8%	9% C	4%	6%	10% C	13% G	6%	10% G
I did not have transportation	8%	14% CDE	7%	8%	7%	7%	8%	7%
Other	11%	16%	13%	10%	11%	11%	13% H	10%

Letters indicate significant differences with comparative segments

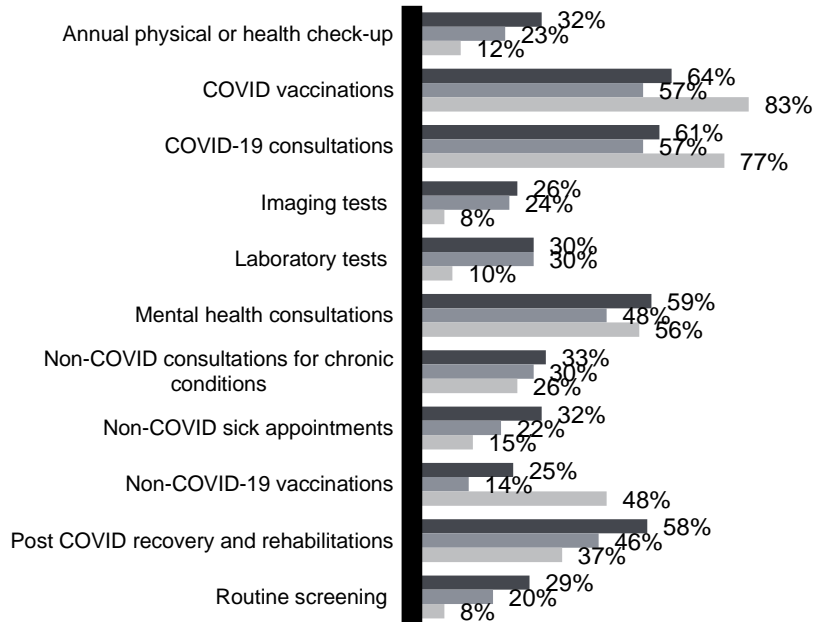
BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188;

Q730 You indicated that you have postponed/delayed or cancelled/avoided entirely certain healthcare services for yourself/an adult in your care or your child/children or a child in your care since the beginning of the pandemic. Why did you postpone or avoid seeking care? / Based on what you have heard from patients that you treat or attend to, what are the most common reasons for patients delaying or avoiding healthcare services since the beginning of the pandemic? Please select all that apply.

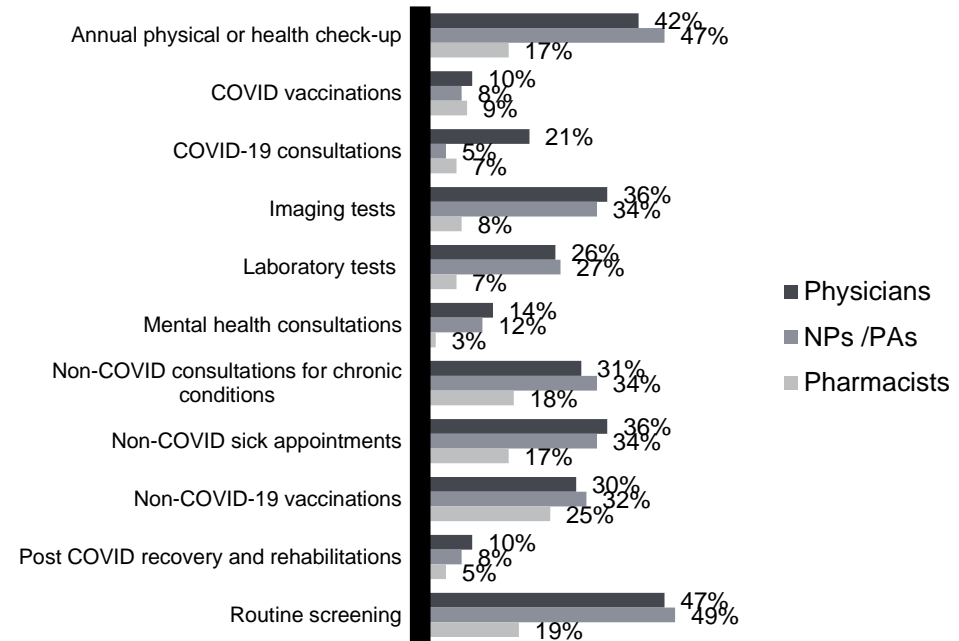


HCPs Also Witness Declines In Screenings/ Annual Check Ups And 60% Report Increases In Mental Health Consultations, Outside of COVID-Related Visits

Services Increased Vs. Height Of The Pandemic



Services Decreased Vs. Height Of The Pandemic



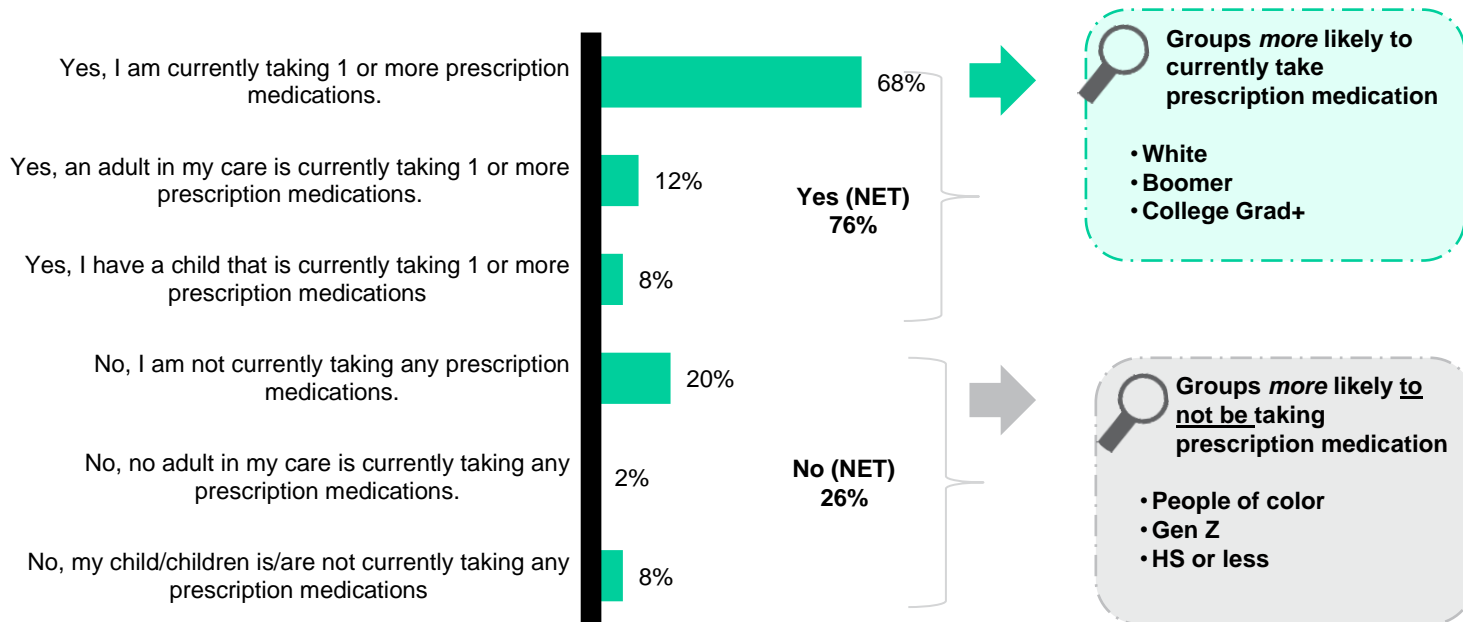
■ Physicians
■ NPs /PAs
■ Pharmacists

Impact Of Pandemic On Medication Access And Adherence



Nearly 7 In 10 Healthcare Consumers Indicate Taking One Or More Prescription Medications

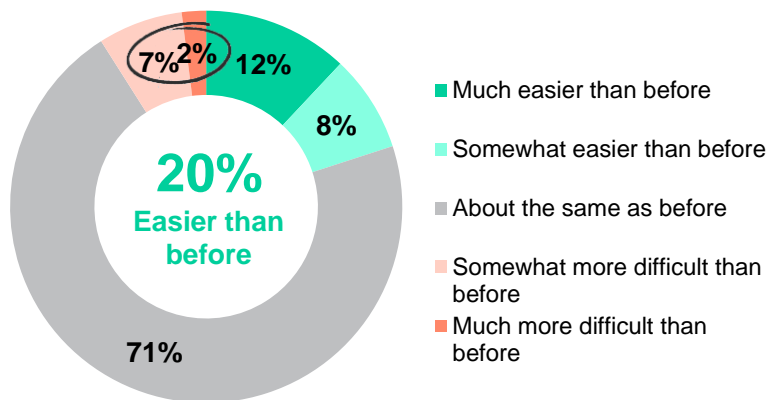
Currently Taking Prescription Medication






While A Vast Majority Of Healthcare Consumers Did Not Experience More Difficulty In Accessing Medications, Nearly 1 in 10 Say Otherwise – More Hispanic, Parents, And Younger Consumers Among Them

Ability to Access Prescription Medications Vs. The COVID-19 Pandemic



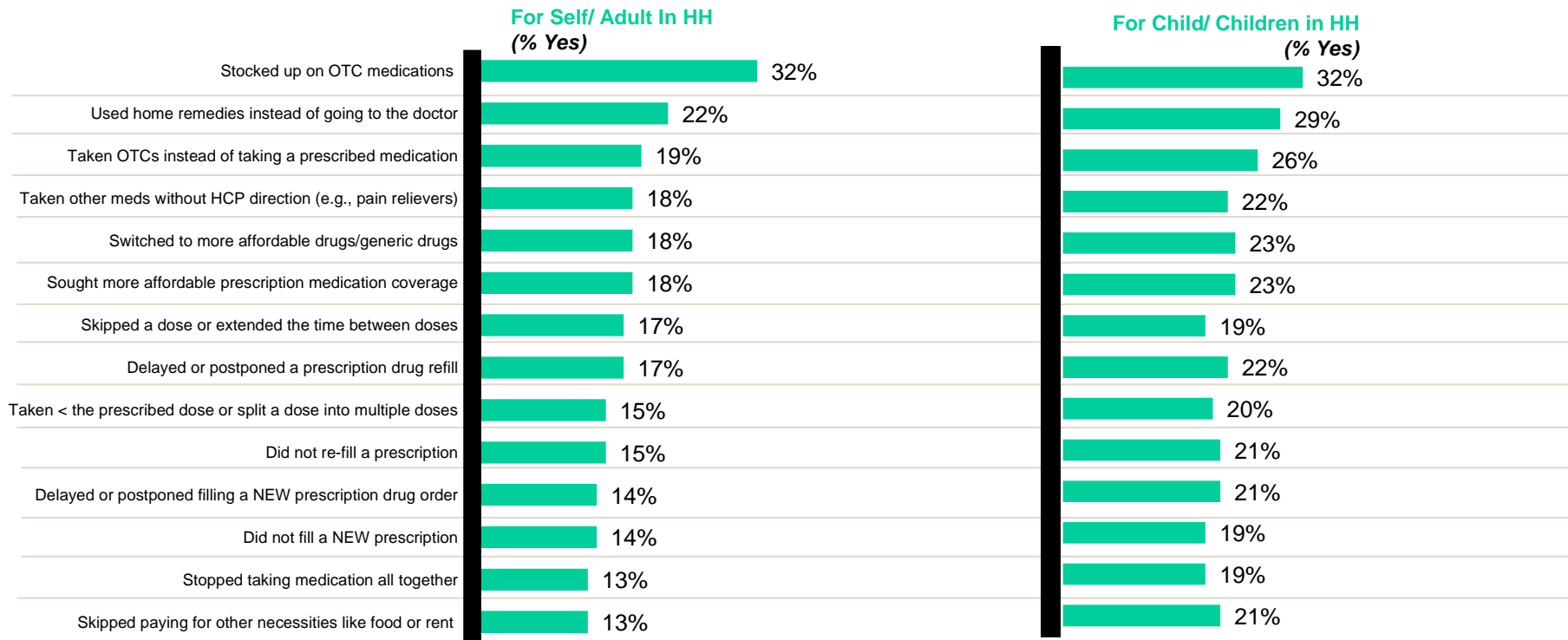
 Groups *more* likely to say it's difficult to get access to prescription medications

- People of color
- Parent
- Urban
- Gen Z, Millennials



About 1 In 3 Healthcare Consumers Indicate Stocking Up On OTCs And Using Home Remedies More Often Since The Pandemic

Have Done The Following Since The Beginning Of The COVID-19 Pandemic In March 2020



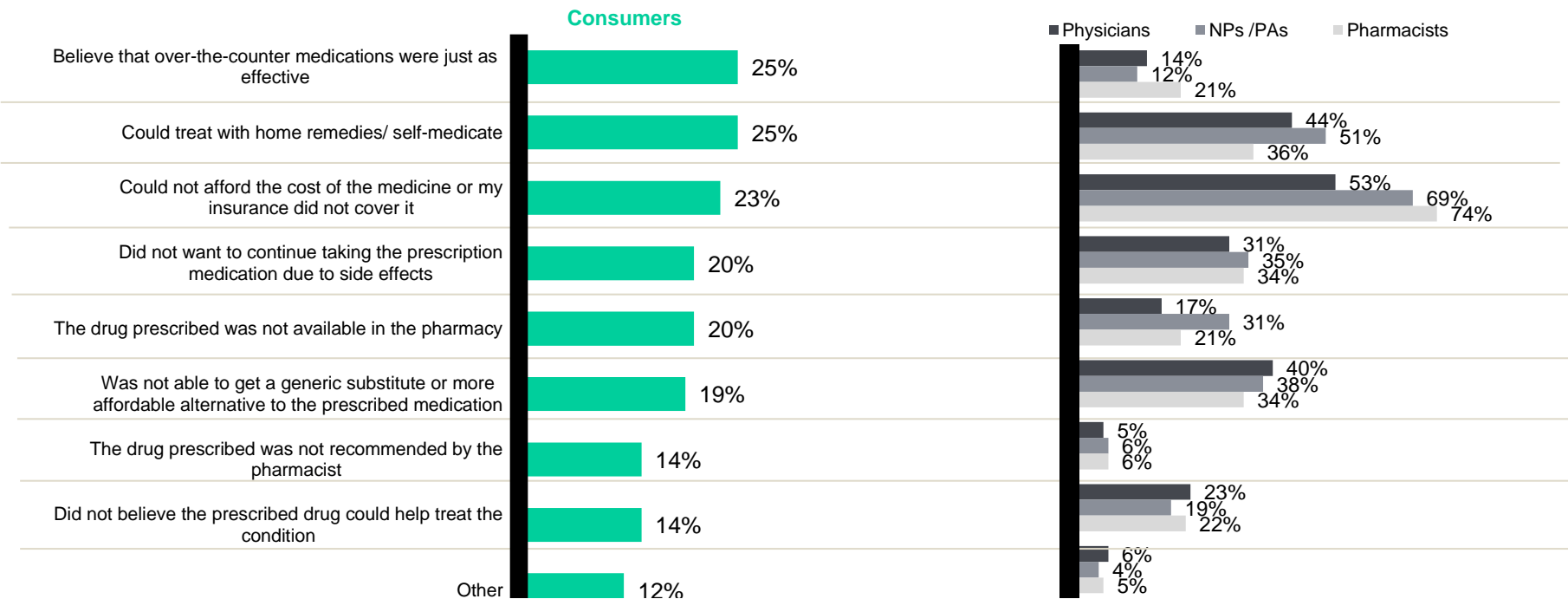
BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188; PARENT OF A CHILD UNDER 18: n=1399

Q815/Q820 Thinking specifically about any prescription medications you may be taking or have been prescribed, have you done any of the following since the beginning of the COVID-19 pandemic in March 2020?



While Consumers Say That OTCs/Home Remedies Are 'Just As Effective', HCPs Cite Affordability As The Key Reason For Pharmaceutical Non-Compliance

Reasons For Delaying Filling/Re-filling Or Not Filling/Re-filling A Prescription, Or Making Other Changes



BASE: ALL QUALIFIED CONSUMER WHO DELAYED PRESCRIPTION REFILLS: n=1817; n=201 PHYSICIANS: n=201; NPS/PAS: n= 201; PHARMACISTS: n=200

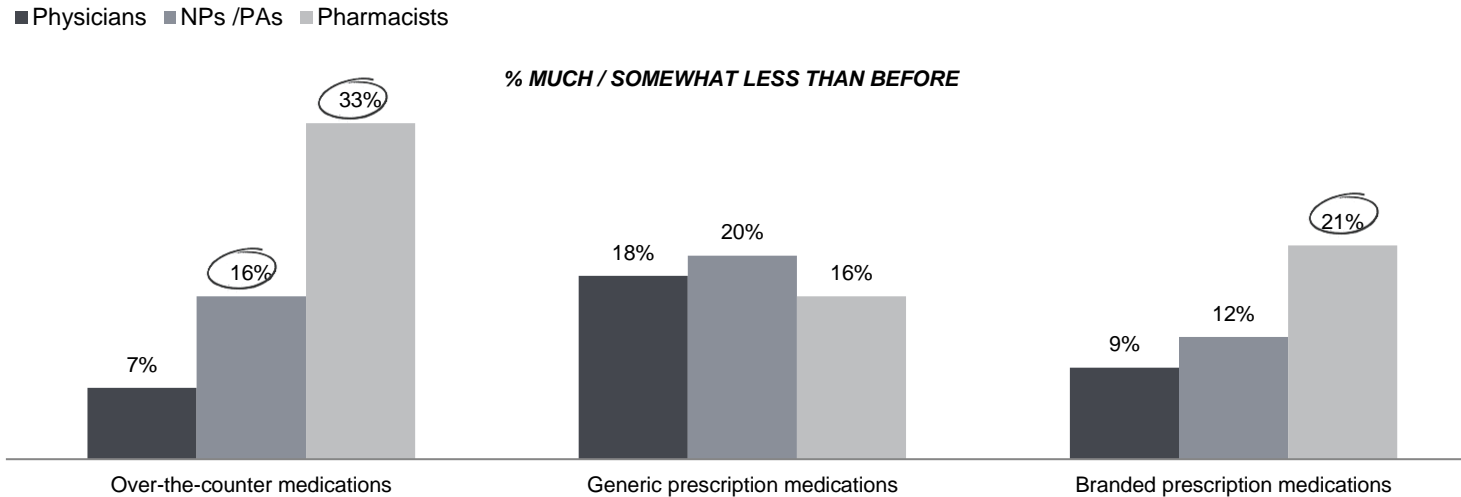
Q825 You indicated that you have delayed filling/re-filling or did not fill/re-fill a prescription, or made other changes to your prescribed medication doses, since the beginning of the COVID pandemic in March 2020. Why?

Q825 Based on what you have heard from the "patients that you treat or attend to, what are the most common reasons for patients delaying prescription medication fills or not filling a prescription at all, or making other changes to prescribed medication doses, due to the pandemic?



Pharmacists Report More Issues For OTC And Branded Prescriptions; Shortages Of Generics Are Reported By About A Fifth Of All HCPs

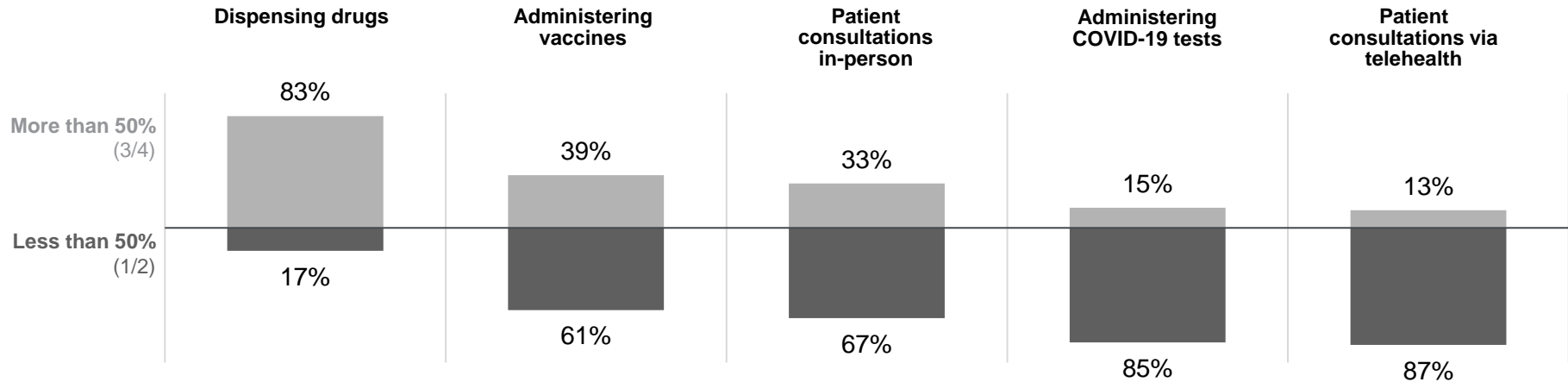
Availability Of Medications Prescribed/Dispensed Compared To Before The COVID-19 Pandemic





Pharmacists Spend The Vast Majority Of Their Time Dispensing Meds...

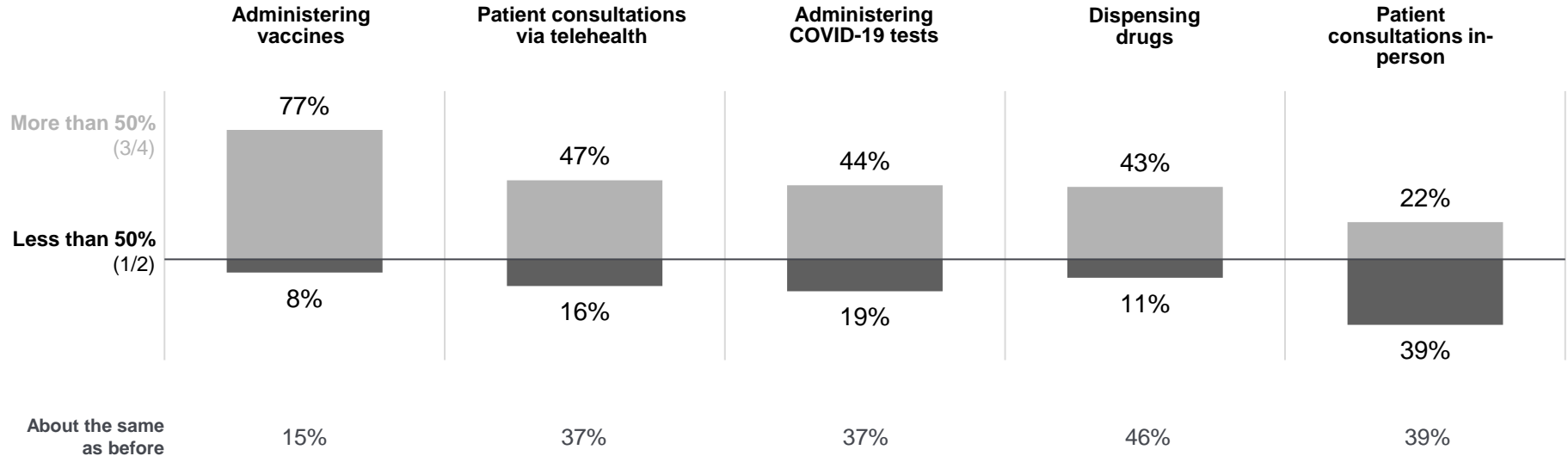
Pharmacists: Time Spent Doing The Following During A Work Week





...But They Are Now Also Increasingly Administering Vaccines

Pharmacists: Weekly Workload/Duties Compared To Before The Beginning Of The COVID-19 Pandemic



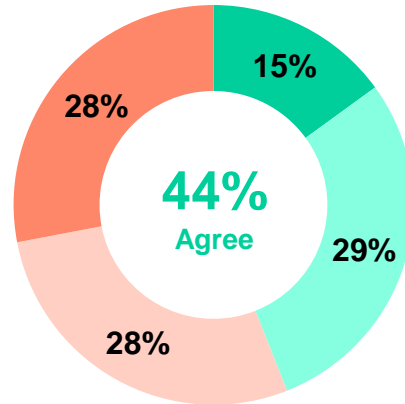
Healthcare Resources Used During The Pandemic



4 In 10 Consumers Are Now Relying On Internet/Social Media For Healthcare Information And Access (9 In 10 Physicians Attest To It); A Similar Proportion Seek Non-Physician Provider Solutions As Well

“Since COVID-19 I am relying on other sources of information (e.g., Internet searches, patient support groups, social media outlets) now more than ever to help me and my family access the care we need.”

“Since COVID-19, I am relying on other types of healthcare professionals besides doctors (e.g., nurses, pharmacists) now more than ever to help me and my family access the care we need.”

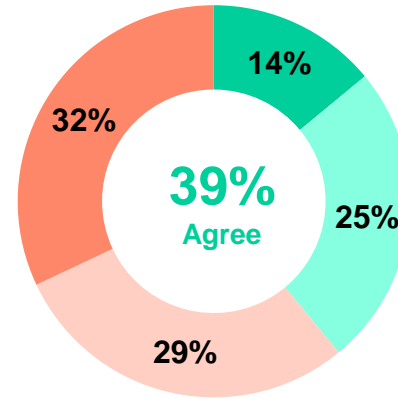


■ Strongly agree

■ Somewhat agree

■ Somewhat disagree

■ Strongly disagree



HCP
88%
Yes

Patients are increasingly turning to social media and the internet to get information on medical care rather than consulting a healthcare provider since the beginning of the pandemic.



Half Of Healthcare Consumers Rely On Providers And Insurers When It Comes To Drug Affordability Concerns; Pharmacists Are Consulted Less Often Than Prescribers

To What Extent, If At All, Do You Rely On Each Of The Following?

My child(ren)'s pediatrician to help me access the medications I can afford for my child(ren)[parent of child under 18]

My health insurance provider to offer a range of coverage options for generic and brand name prescription medications

My physician or primary healthcare provider to help me access the medications I can afford

My local pharmacist(s) to help me access the medication(s) I need during the pandemic

My local pharmacist(s) to recommend generic alternatives to prescription medications

A lot/Great deal

56%

51%

50%

45%

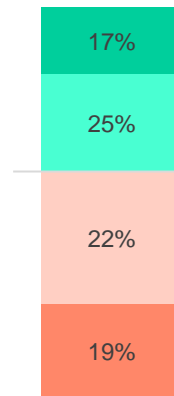
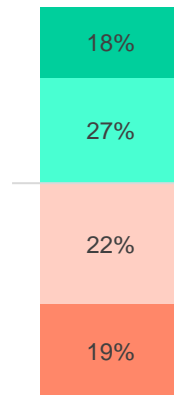
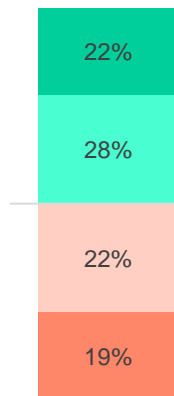
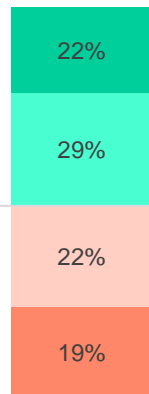
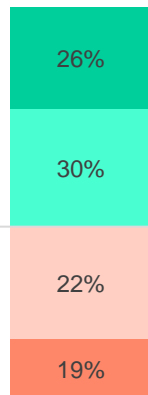
42%

A lot

A great deal

A little

Not at all



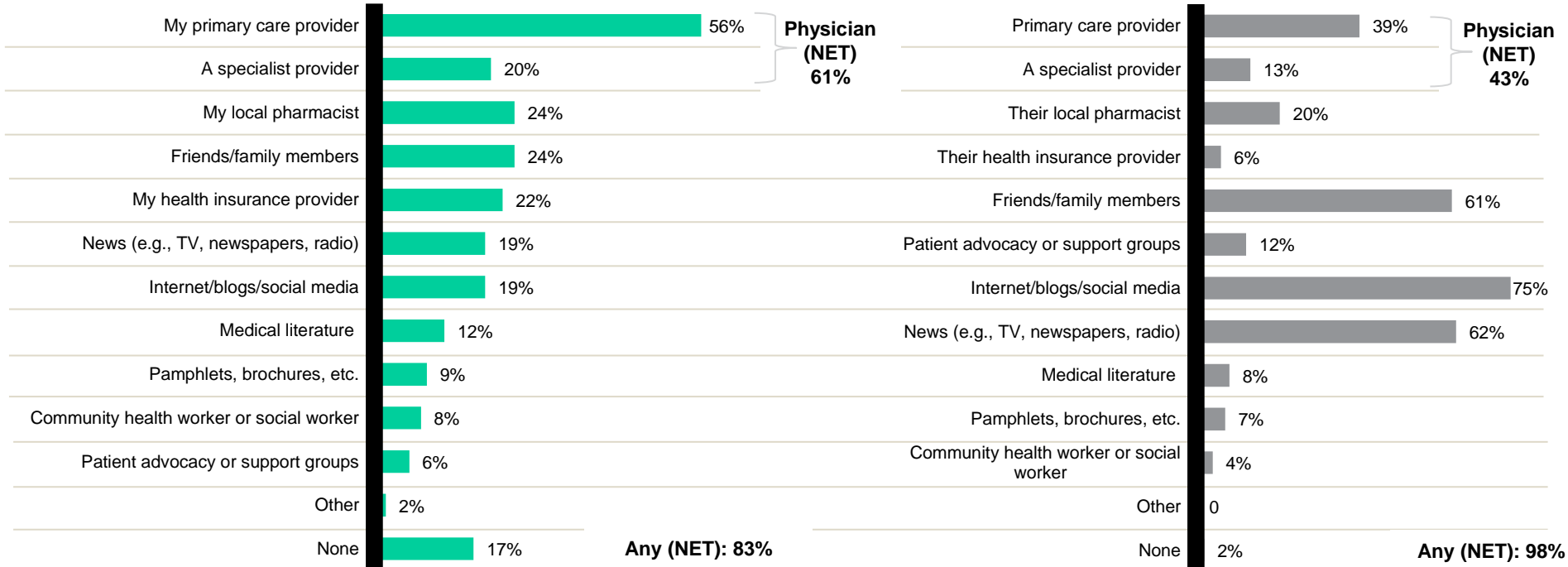
BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188

Q830 To what extent, if at all, do you rely on each of the following?



While Healthcare Consumers Mostly Indicate Relying On Physicians For Advice, Most Physicians Feel Patients Are Turning To Social/News Media And Friends/Family

Resources For Information And Advice About Healthcare Needs During The Pandemic



BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188/ HCPs: n= 602

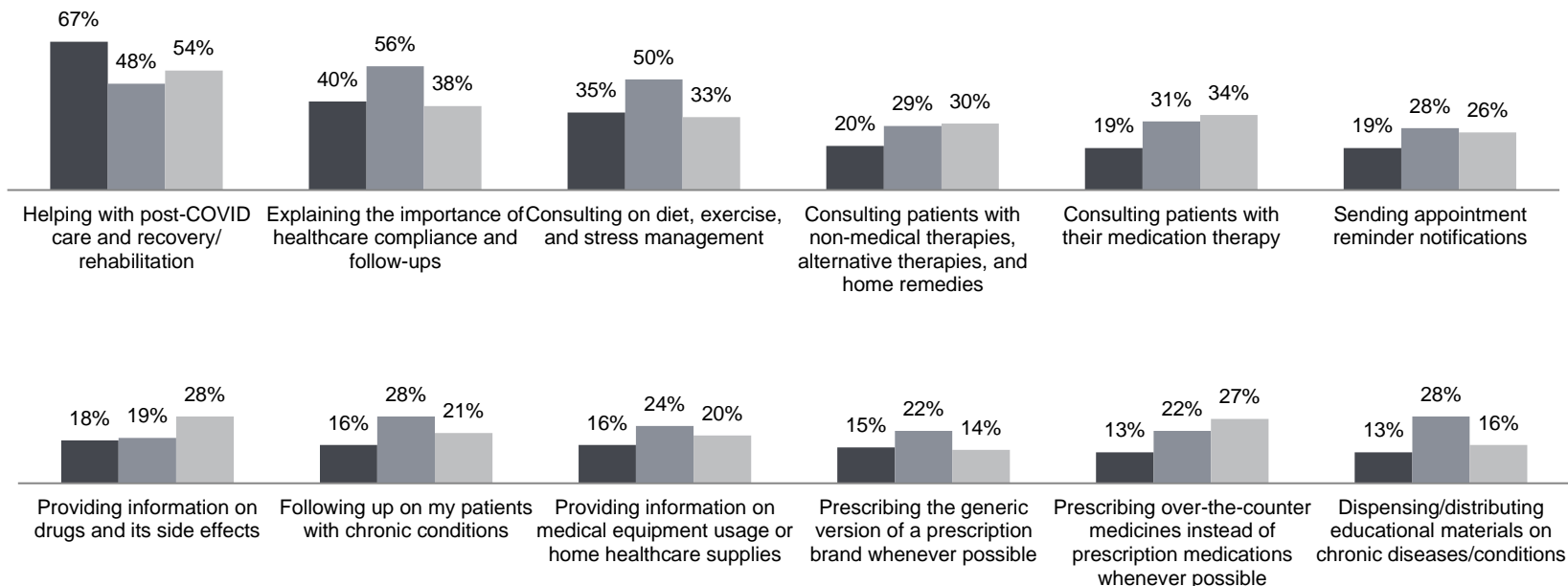
Q900 Which of the following resources, if any, have you/your patients turned to for information and advice about your/your family's healthcare needs during the pandemic? Please select all that apply.



Physicians Are Increasingly Providing COVID-Related Care While NP/PAs Are Consulting On Compliance And Diet Areas More Since The Pandemic

Doing This More Than Before The Pandemic...

■ Physicians ■ NPs /PAs ■ Pharmacists



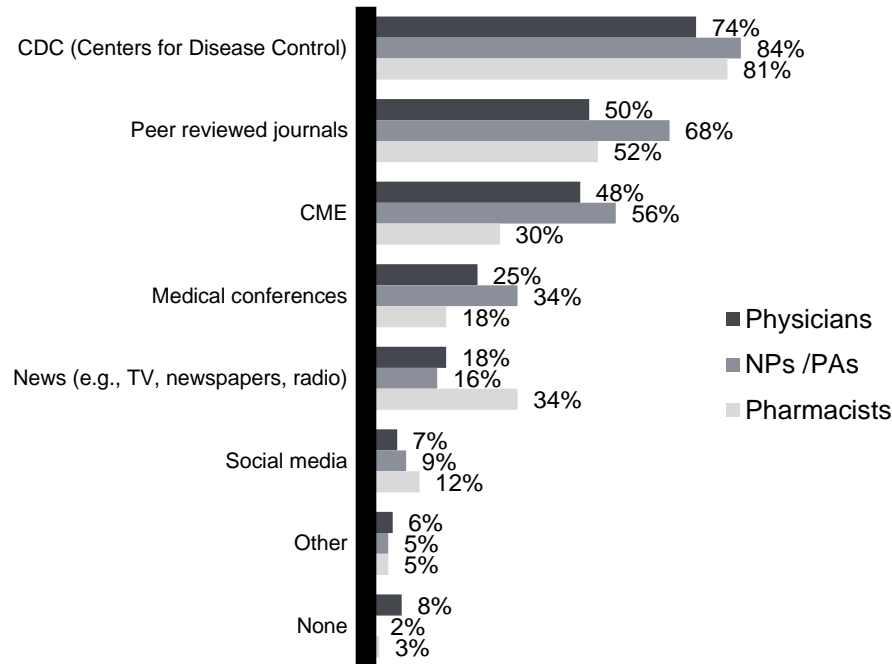
BASE: PHYSICIANS: n=201; NPS/PAS: n= 201; PHARMACISTS: n=200

Q735 For each of the following, please indicate if you are now doing this more, less, or the same as before the pandemic



A Large Majority Of Healthcare Professionals Used The CDC As An Information Resource To Help Treat Patients

Resources HCPs Relied On During The Pandemic To Help Serve Patients Or Customers

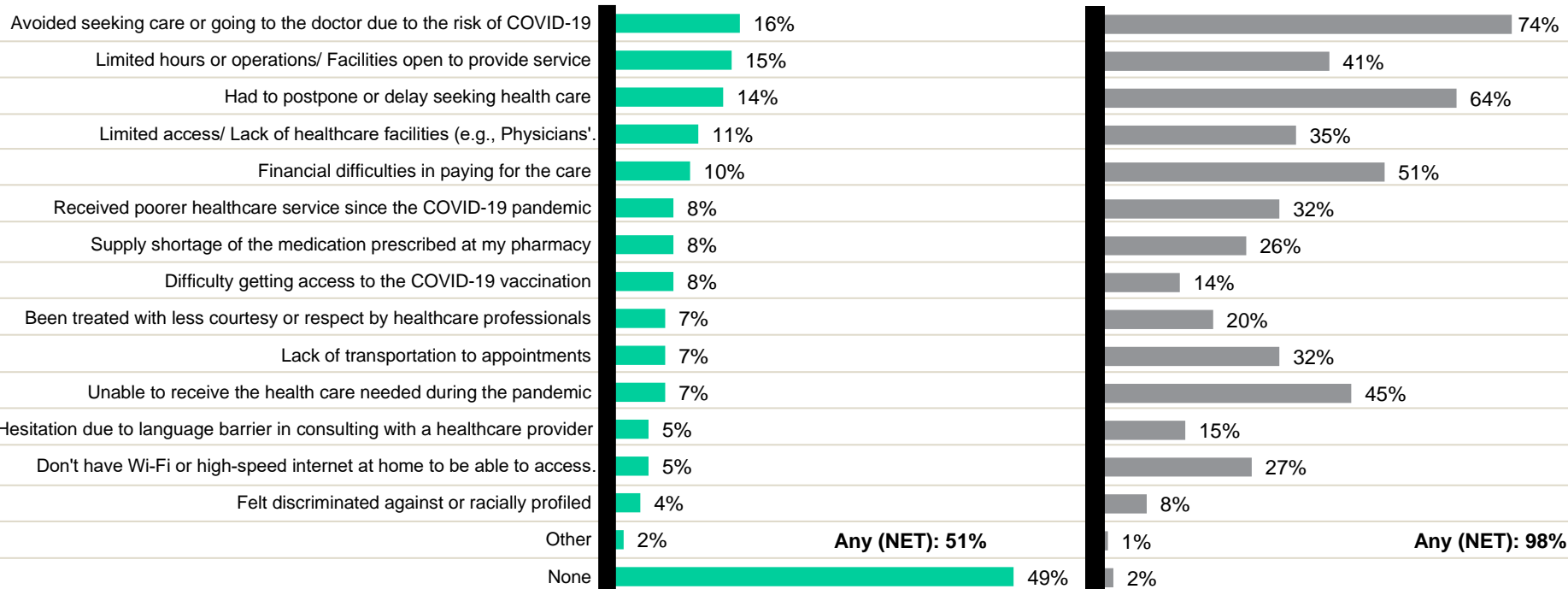


Healthcare Challenges



COVID-19 Impacted Access To Healthcare For About Half Of Consumers; According To HCPs, It Impacted Nearly All Of Their Patients

Challenges Experienced In Accessing Healthcare Due To The Pandemic



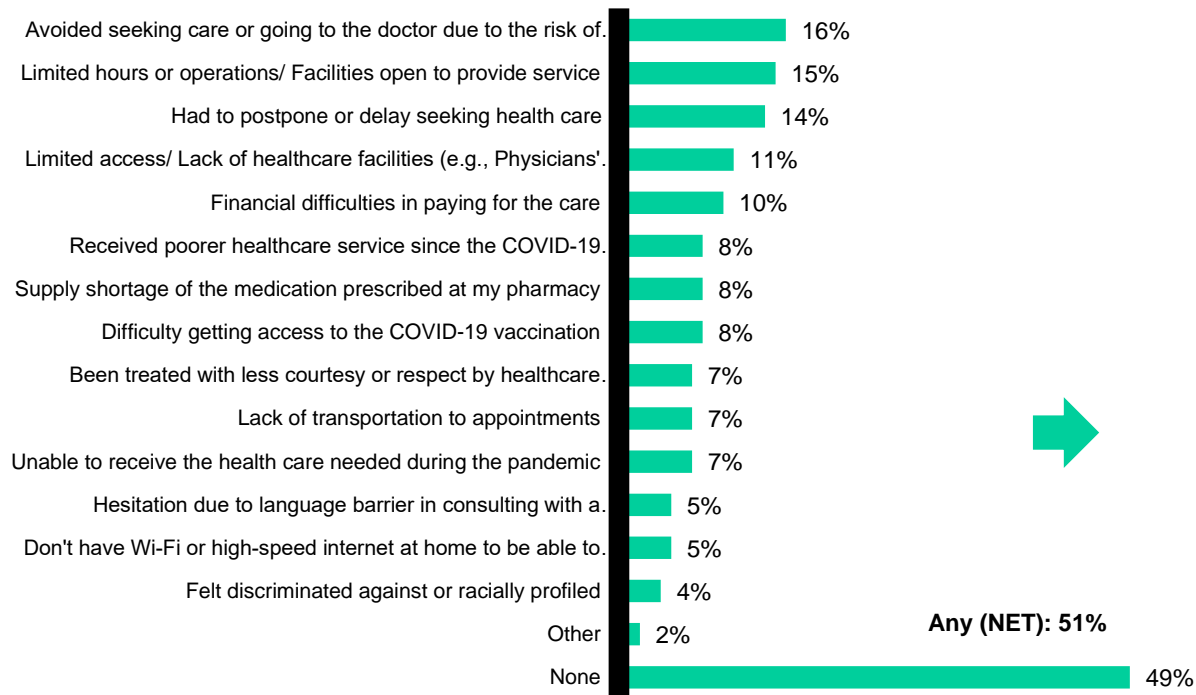
BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188; HCPs: n= 602

Q910 What challenges, if any, have you or your family experienced when it comes to accessing the healthcare you need due to the pandemic? Please select all that apply.



Hispanic, Parents, Urban Residents, And Millennials Were Impacted More Than Others In Terms Of Health Access

Challenges Experienced In Accessing Healthcare Due To The Pandemic



Groups *more* likely to have experienced any challenges

- People of color (Hispanic)
- Parent
- Urban
- Millennial
- Patient
- Care giver
- High Income / Education

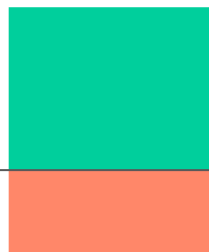




3 In 10 Consumers Do Not Believe The System Cares For Them And 4 In 10 Do Not Believe It Works Fairly Across Communities; Black, Women, Younger And Lower Income Segments Tend To Be More Affected

"I feel like the US healthcare system does care about people like me."

66%

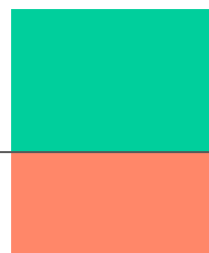


34%

"I feel like the US healthcare system doesn't care about people like me."

"The system is working fairly across communities when it comes to healthcare access."

58%



42%

"The system is NOT working fairly across communities when it comes to healthcare access."

 Groups *More* likely to agree with statement


- White
- Male
- Boomer
- High Income

 Groups *More* likely to agree with statement

- Black
- Female
- Gen Z/ Millennial
- Lower Income
- Caregiver

 Groups *more* likely to agree with statement

- White
- Male
- Gen X, Millennial, Boomer
- High Income

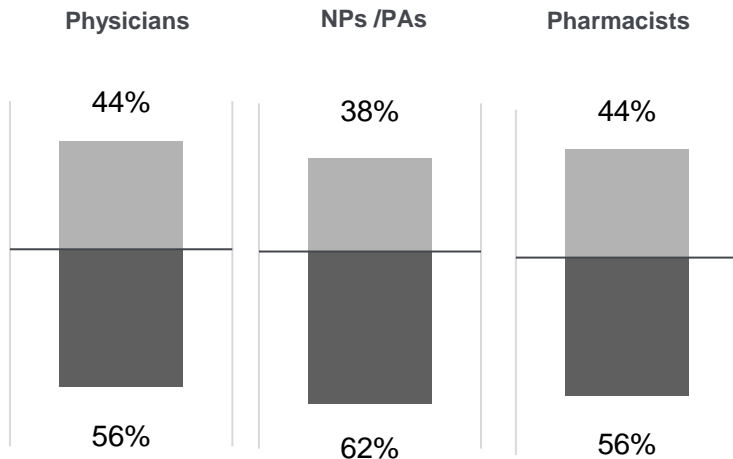
 Groups *more* likely to agree with statement

- Black
- Female
- Gen Z
- Lower Income



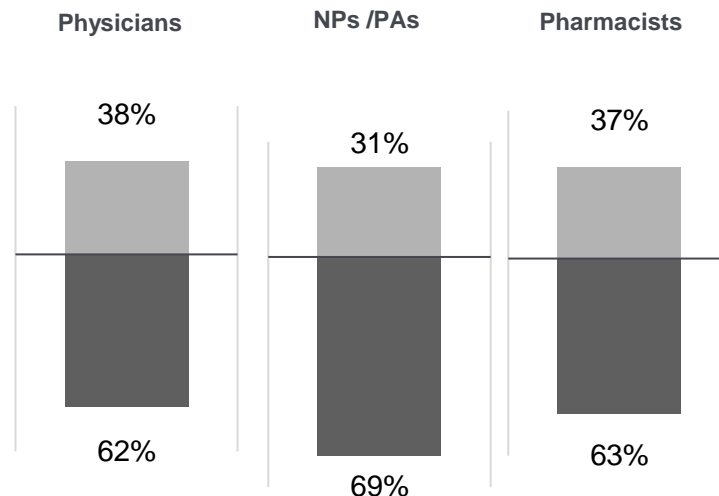
HCP Sentiments Lean Much More On The Negative Side Than Consumers On Health Disparity; 6 In 10 Believe The System Is Not Fair To All

"I feel like the US healthcare system does care about all people equally."



"I feel like the US healthcare system doesn't care about all people equally."

"The system is working fairly across communities when it comes to healthcare access."



"The system is NOT working fairly across communities when it comes to healthcare access."



COVID-19 Negatively Impacted Hispanic And Urban Segments More Than Others

% Who Experienced....

		White (B)	Hispanic (C)	Black (D)	Asian (E)	Urban (F)	Suburban (G)	Rural (H)
Visited a food bank/soup kitchen, received donations from a food drive, or taken food from a neighborhood free pantry	18%	14%	35% BDE	25%	14%	29% GH	11%	16% (G)
Been unable to pay the rent or mortgage	18%	15%	30% BDE	20%	15%	30% GH	11%	12%
Been unable to buy/provide enough food	16%	14%	28% BDE	17%	14%	26% GH	10%	12%
Felt unsafe in my neighborhood	16%	14%	25% BDE	17%	16%	29% GH	9%	9%
Felt unsafe in my household	10%	9%	16% B	11%	11%	21% GH	5%	4%
Been evicted or had to move from my primary residence	8%	7%	13% BE	11%	4%	16% GH	4%	3%



Low Income/Education Groups Experienced Financial Impacts More; High Income/Education Segments More Likely To Have Felt Unsafe

% Who Experienced....

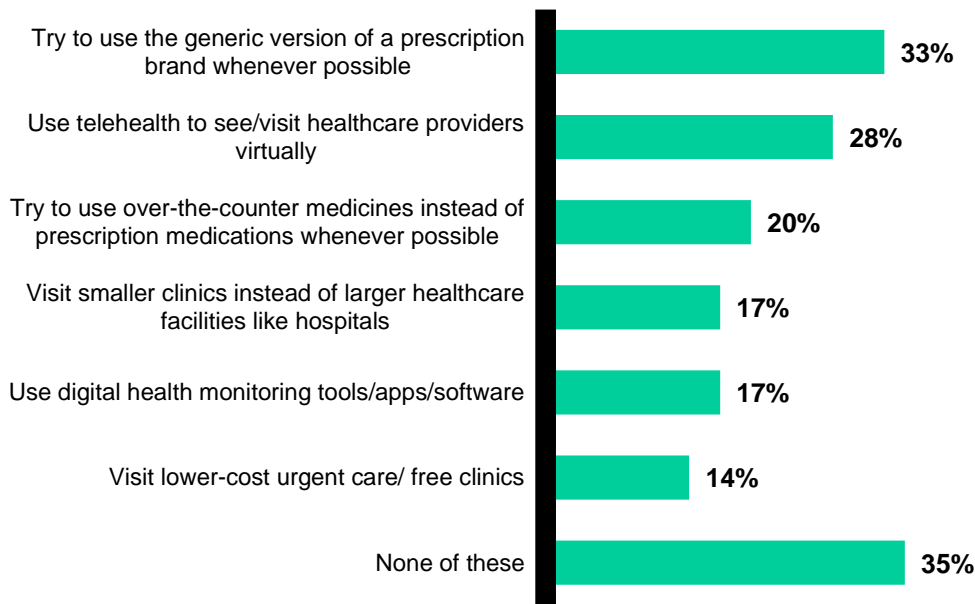
		<\$25K (B)	\$25-\$50K (C)	\$50-\$75K (D)	\$75K+ (E)	HS or Less (F)	Some College (G)	College Grad+ (H)
Visited a food bank/soup kitchen, received donations from a food drive, or taken food from a neighborhood free pantry	18%	35% CDE	20% E	15%	16%	37% GH	16%	18%
Been unable to pay the rent or mortgage	18%	27% CDE	14%	14%	18% D	30% GH	15%	20% G
Been unable to buy/provide enough food	16%	29% CDE	15%	12%	16%	28% GH	15%	16%
Felt unsafe in my neighborhood	16%	19% CD	13%	12%	18% CD	15%	14%	19% G
Felt unsafe in my household	10%	9% D	7%	5%	13% CD	12% G	7%	15% G
Been evicted or had to move from my primary residence	8%	8% D	5%	4%	10% CD	11% G	5%	12% G

Looking Ahead Beyond COVID-19

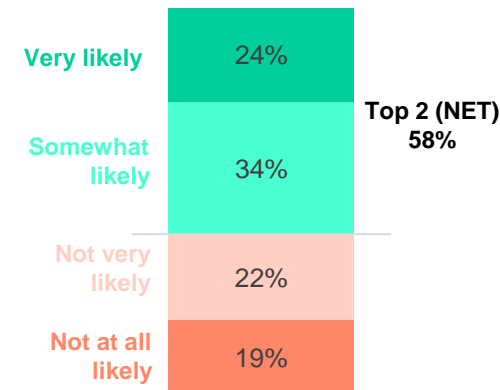


Most Consumers Intend To Continue Taking Affordable And/or Safe Healthcare Measures; Over Half Are Likely To Use Telehealth In The Future

Plan To Do Or Use After The COVID-19 Pandemic Ends



Likely To Use Telehealth After The COVID-19 Pandemic



BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188

Q925 Looking forward, which of the following, if any, do you plan to do or use after the COVID-19 pandemic ends? Please select all that apply.

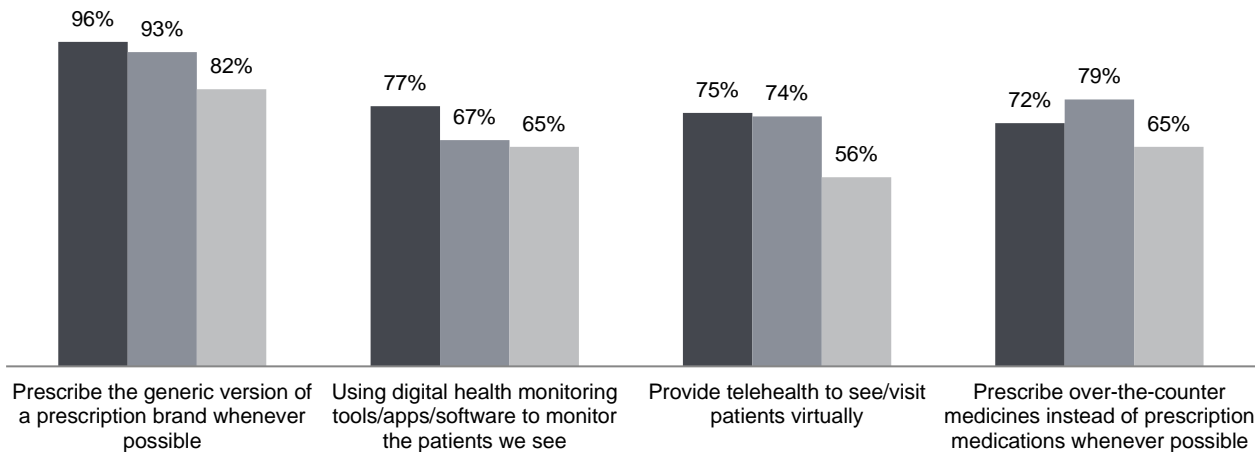
Q718 How likely are you to use telehealth to see/visit your doctor or healthcare provider after the COVID-19 pandemic?



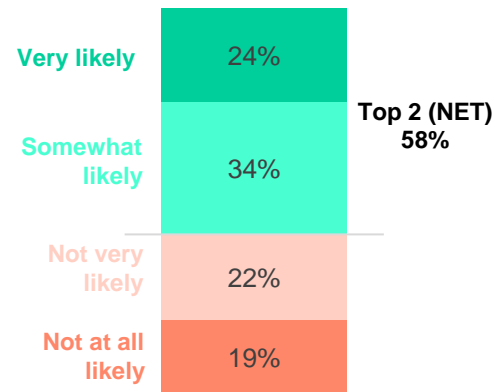
Likewise, Almost All Providers Intend To Continue To Prescribe Generics When Possible; Majorities Also Intend To Provide Virtual Services

Very / Somewhat Likely To Do After The COVID-19 Pandemic Ends

■ Physicians ■ NPs /PAs ■ Pharmacists



Likely To Use Telehealth After The COVID-19 Pandemic



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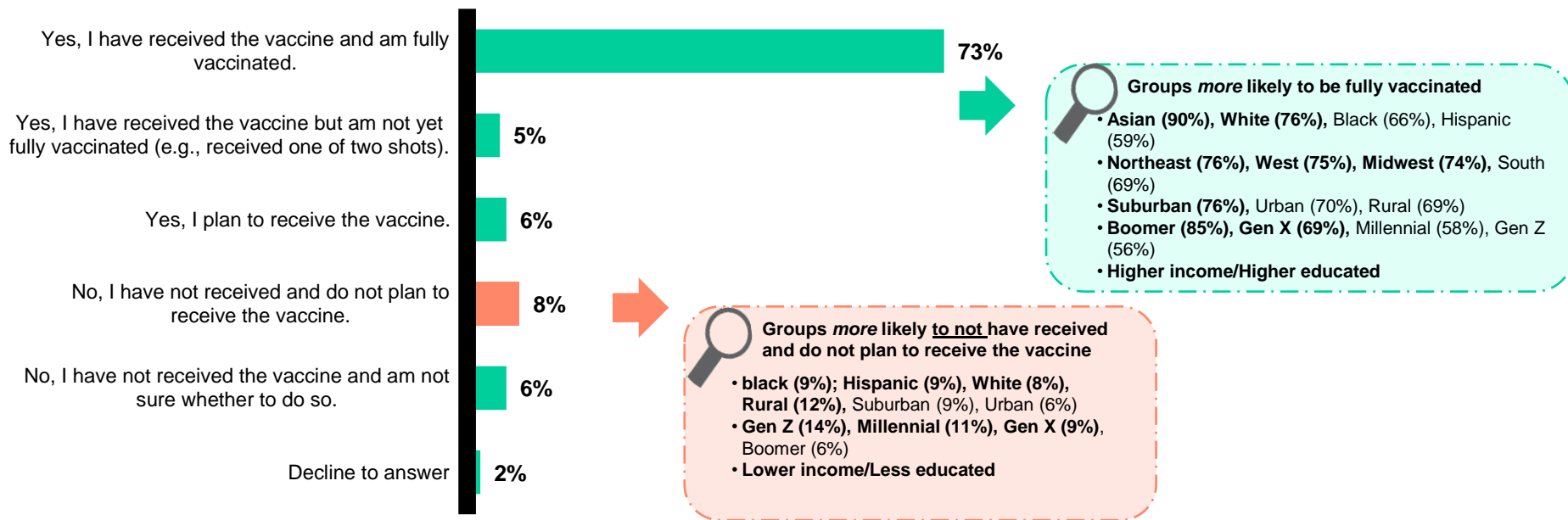
Q935 Looking forward, how likely are you to continue to do each of the following even after the COVID-19 pandemic ends?

Q718 How likely are you to use telehealth to see/visit your doctor or healthcare provider after the COVID-19 pandemic?



3 In 4 Healthcare Consumers Report Being Fully Vaccinated; Nearly 1 In 10 Are Not And Say They Do Not Intend To Get the Vaccine

Have Received Or Plan To Receive The COVID-19 Vaccine



Impact Of Pandemic On Healthcare Professionals



For Healthcare Professionals, Staffing And Excess Workload Is The Biggest Challenge Of The Pandemic And Is Expected To Continue After

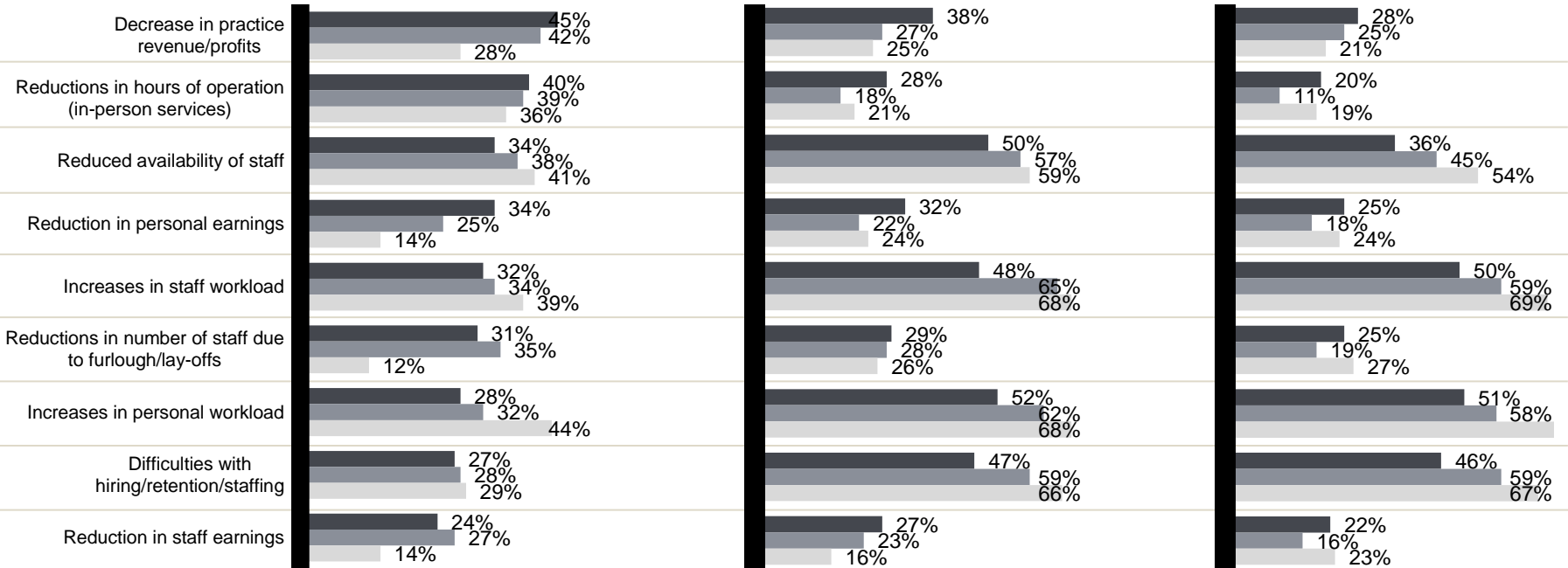
Have Experienced/Expect To Experience As A Result Of The Pandemic ...

■ Physicians ■ NPs /PAs ■ Pharmacists

At The Beginning Of The Pandemic

Now, During The Pandemic

Expect To Continue After The Pandemic



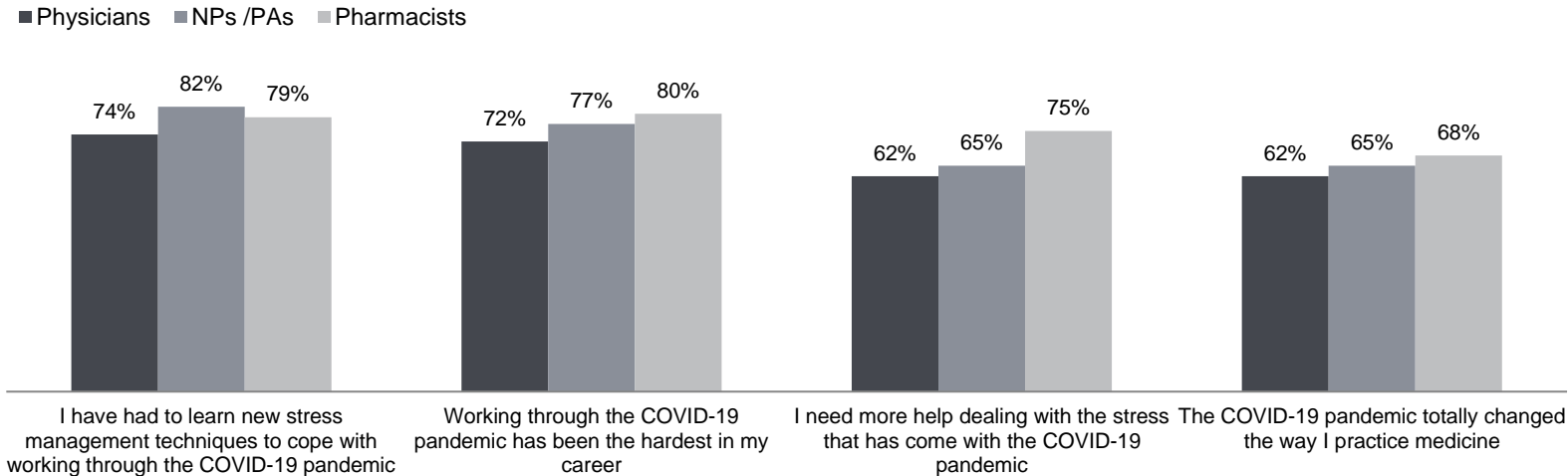
BASE: PHYSICIANS: n=201; NPS/PAS: n= 201; PHARMACISTS: n=200

Q940 Which of the following, if any, have you experienced (or do you expect to experience) in your [IF PCP (Q600/2) or NP/PA (Q600/4), SHOW: "practice"; IF PHARMACIST (Q600/3), SHOW: "pharmacy"] as a result of the pandemic? Please select all that apply in each column.



An Overwhelming Majority Across All HCP Groups Agreed On Having To Adopt New Stress Management Techniques To Cope With The Pandemic

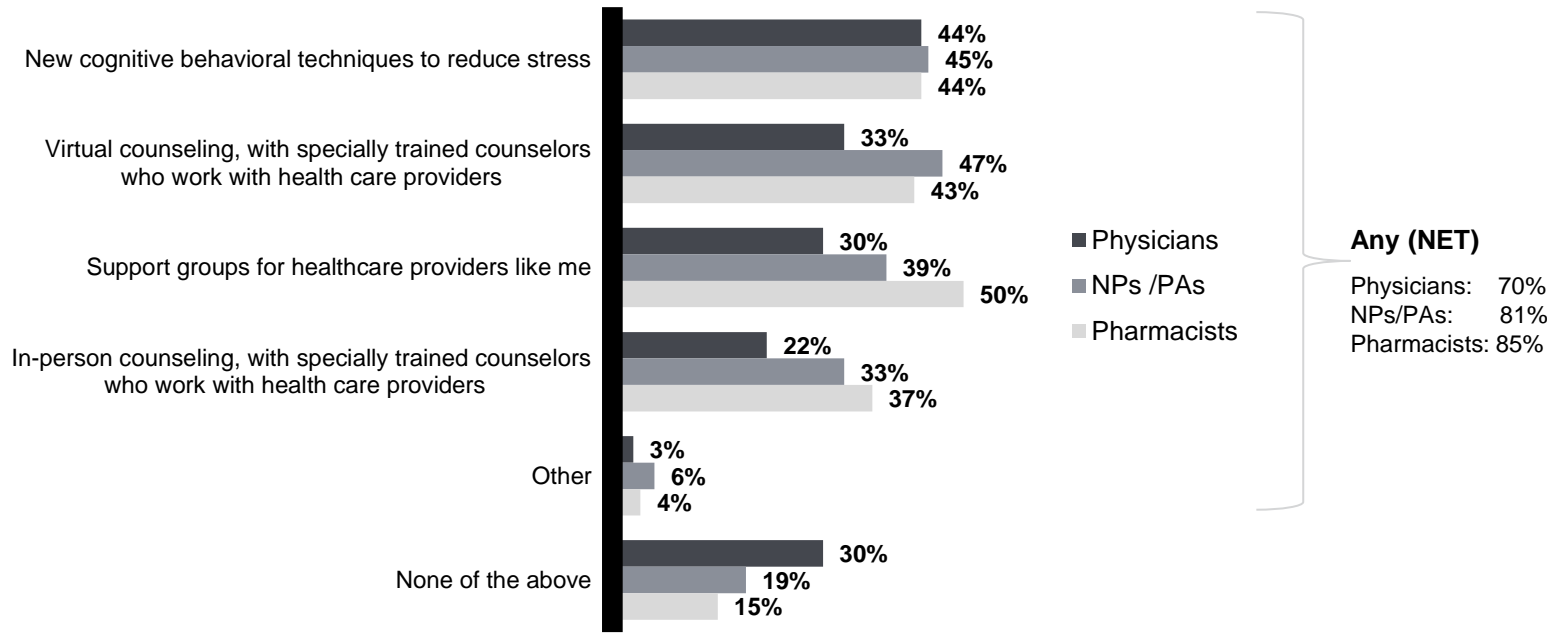
Strongly / Somewhat Agree ...





Cognitive Behavioral Techniques Are Uniformly Cited By All HCPs As Helpful Resources; Pharmacists Are More Likely To Cite Support Groups

Most Helpful Resources For Healthcare Workers To Cope With The Mental And Emotional Impact Of The COVID-19 Pandemic



Demographics



Healthcare Consumers – Demographics

Gender	
Male	49%
Female	51%
Age	
18-24	8%
25-34	16%
35-44	15%
45-54	16%
55-64	19%
65+	26%
MEAN	50.5
Employment	
EMPLOYED (NET)	59%
Employed full time	45%
Employed part time	8%
Self-employed full time	4%
Self-employed part time	2%
NOT EMPLOYED (NET)	41%
Not employed, but looking for work	4%
Not employed and not looking for work	1%
Not employed, unable to work due to a disability or illness	4%
Retired	26%
Student	2%

Marital Status	
Never married	23%
Married or civil union	53%
Divorced	11%
Separated	2%
Widow/Widower	7%
Living with partner	4%
Income	
Less than \$15,000	4%
\$15,000 to \$24,999	5%
\$25,000 to \$34,999	7%
\$35,000 to \$49,999	10%
\$50,000 to \$74,999	17%
\$75,000 to \$99,999	13%
\$100,000 to \$124,999	16%
\$125,000 to \$149,999	10%
\$150,000 to \$199,999	8%
\$200,000 to \$249,999	3%
\$250,000 or more	5%



Healthcare Consumers – Demographics

Region	
Northeast	17%
Midwest	22%
South	38%
West	23%
Urbanicity	
In an urban or city area	35%
In a suburban area next to a city	46%
In a small town or rural area	19%
Child in the Household	
0	61%
ANY	39%
1	15%
2	16%
3	5%
4+	3%

Education	
LESS THAN HIGH SCHOOL (NET)	6%
Less than high school	1%
Completed some high school	4%
HIGH SCHOOL TO LESS THAN 4 YEAR COLLEGE DEGREE (NET)	55%
High school graduate	18%
Job-specific training program(s) after high school	4%
Some college, but no degree	20%
Associate degree	13%
4 YEAR COLLEGE DEGREE OR MORE (NET)	39%
Bachelor's degree (such as B.A., B.S.)	20%
Some graduate school, but no degree	3%
Graduate degree (such as MBA, MS, M.D., Ph.D.)	17%



Healthcare Consumers – Demographics

Race	
White	69%
Black or African American	11%
Hispanic	14%
Asian	5%
Other	2%
Received The Following Income Or Financial Assistance In 2020/2021	
COVID-19 stimulus payment(s)	70%
Healthcare or coverage through Medicaid	26%
SNAP (Supplemental Nutritional Assistance Program)	22%
Unemployment benefits	20%
Other income or financial assistance from local, state, or federal government	13%
WIC (nutrition program for Women, Infants, and Children)	11%
Section 8 Housing Choice Voucher Program	9%
TANF (Temporary Assistance for Needy Families)	8%

Experience	
I am a non-healthcare worker and have been working full time or over-time during the COVID-19 pandemic.	29%
I am still working but have had my hours cut due to the COVID-19 pandemic.	19%
I have been laid off, furloughed, or lost my job due to the COVID-19 pandemic.	15%
I am a healthcare worker (e.g., nurse, doctor, paramedic) and have been working full time or over-time during the COVID-19 pandemic.	12%
I lost or had to give up my health insurance coverage due to the COVID-19 pandemic.	9%



Healthcare Providers – Demographics

	Total	Physicians	NPs /PAs	Pharmacists
Gender				
Male	41%	61%	16%	45%
Female	58%	36%	84%	53%
Age				
25 - 34	28%	13%	34%	37%
35 - 44	28%	29%	28%	26%
45 - 54	20%	26%	18%	15%
55 - 64	16%	17%	14%	17%
65+	8%	14%	5%	3%
Years in Practice				
0 to 2 years	9%	9%	-	-
3 to 10 years	23%	23%	-	-
11 to 20 years	31%	31%	-	-
21 to 30 years	21%	21%	-	-
31+ years	16%	16%	-	-
Employed/Actively Interacted With Patients At The Beginning Of The COVID-19 Pandemic In The Spring Of 2020				
Yes	97%	95%	96%	99%

	Total	Physicians	NPs /PAs	Pharmacists
Medical Practice Type				
Mostly office- or clinic-based	75%	81%	68%	-
Mostly hospital- or lab-based	7%	6%	9%	-
Exclusively hospital- or lab-based	7%	4%	10%	-
Mostly long-term care facility-based	2%	2%	1%	-
Mostly hospice-based	1%	2%	0%	-
Equally hospital-based and office/clinic-based	8%	5%	10%	-
Other	1%	1%	1%	-
Medical Practice Specialty				
Solo practice	19%	20%	18%	-
Single-specialty partnership or group (2 or more physicians)	42%	39%	46%	-
Multi-specialty partnership or group (2 or more physicians)	39%	41%	36%	-
	NPs /PAs			
Occupation				
Nurse Practitioner	64%			
Physician's Assistant	36%			



Healthcare Providers – Demographics

	Total	Physicians	NPs /PAs	Pharmacists
Average Number of Patients Seen in a Typical Week				
MEAN	145.4	115.1	87.2	234.3
Age of Patients				
18 years or younger (pediatric)	2%	-	7%	0
19 years to 64 years (adult)	12%	11%	15%	9%
19 years and older (adult and geriatric)	35%	46%	34%	23%
65 years and older (geriatric)	4%	3%	3%	6%
All ages	47%	40%	40%	61%
Average Number of Prescriptions Written in a Week				
MEAN	580.1	161.9	104.8	1478

Race/Ethnicity				
White	64%	58%	77%	57%
A. American/Black	7%	4%	7%	10%
Latino/Hispanic	3%	3%	5%	2%
Asian	17%	22%	6%	21%
Other	5%	7%	3%	5%

	Total	Physicians	NPs /PAs	Pharmacists
Practice Area				
Urban/city area	41%	35%	47%	41%
Suburban area next to a city	41%	48%	29%	47%
Small town/rural area	18%	17%	24%	12%
Time Spent Practicing/Working/Volunteering In A Free Or Low-income Clinic				
MEAN	11.6	13.6	15.1	5.3
Gender Proportion Of Patients (Mean)				
Male	46.4	47	46	46
Female	50.8	51	51.2	50.1
Transgender	1.8	1.3	1.8	2.4
Non-binary/Gender Non-conforming	1.1	0.7	1	1.5
Racial / Ethnic Proportion Of Patients (Mean)				
White	53.3	56.4	50.4	52.9
African-American/Black	20.2	18.7	21.4	20.6
Latino/Hispanic	16.4	15.2	18.5	15.1
Asian	6.7	7	5.8	7.3
Native American or Alaskan Native	1.5	1.3	1.8	1.4



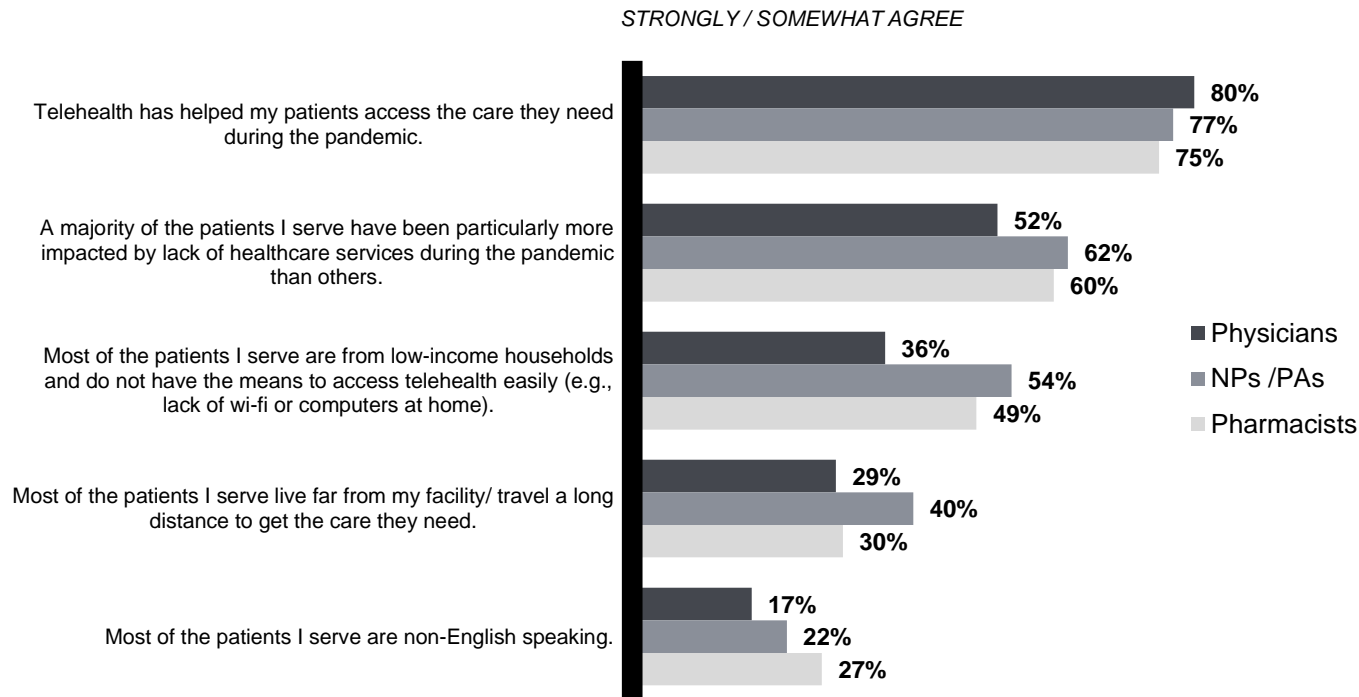
Healthcare Providers – Demographics

	Total	Physicians	NPs /PAs	Pharmacists
Patient Household Income				
Low-income households	38.7	35.1	43.6	37.1
Mid income households	43.4	46.0	41.8	42.5
High income households	17.8	18.8	14.6	20.5
% Of Patients...				
Have been laid off, furloughed, or lost jobs due to the COVID-19 pandemic	24%	24%	28%	20%
Lost or had to give up health insurance coverage due to the COVID-19 pandemic	22%	19%	26%	21%
Patient Health Insurance				
Group health insurance (e.g., through an employer, university, or state (ACA))	38%	44%	37%	33%
Medicaid	21%	16%	25%	23%
Medicare	27%	27%	25%	31%
Other public insurance (e.g., Veterans benefits)	6%	8%	6%	5%
Have no health insurance/Uninsured	7%	6%	7%	8%

Appendix




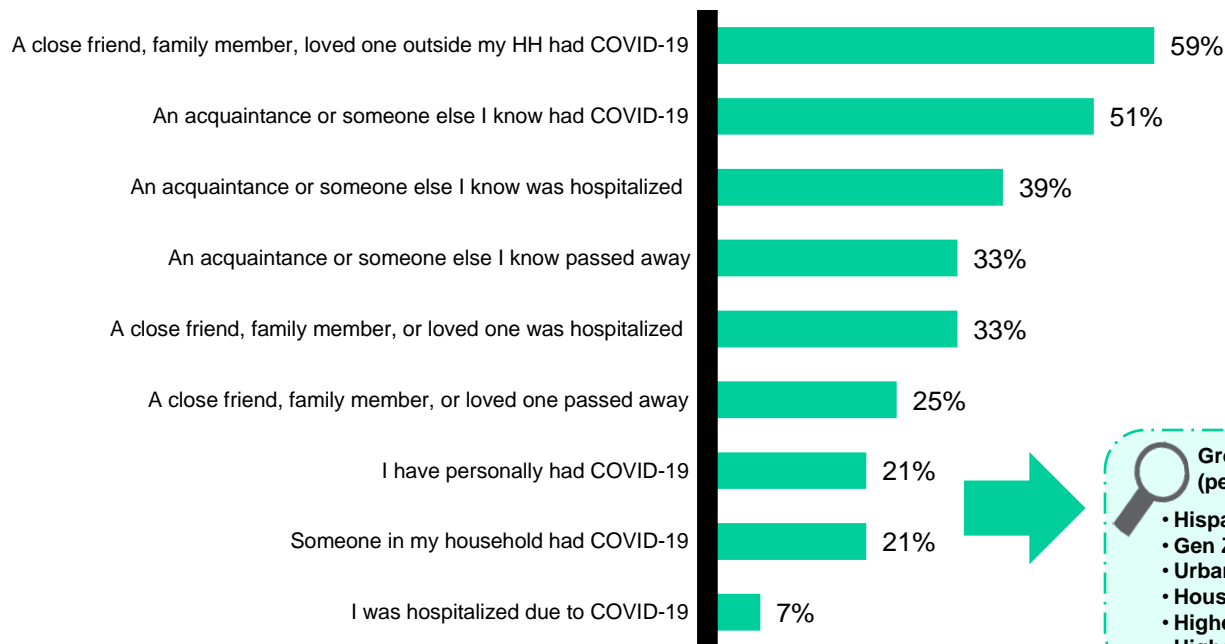
Agreement With Various Healthcare Access Statements





Experienced Or Know Of Someone Close Contracting COVID-19

Have Experienced Or Know Someone Who Experienced The Following Due To COVID-19



Groups *more* likely have had COVID-19 (personally/someone in their household)

- Hispanic
- Gen Z, Millennials
- Urban
- Households with children
- Higher income
- Higher educated



Experienced Various Work/Job Related Changes Due To COVID-19

% Who Experienced....

			<\$25K (B)	\$25-\$50K (C)	\$50-\$75K (D)	\$75K+ (E)	HS or Less (F)	Some College (G)	College Grad+ (H)
I am a non-healthcare worker and have been working full time or over-time during the COVID-19 pandemic.	29%		10%	17% B	27% BC	38% BCD	17%	25%	38% FG
I am still working but have had my hours cut due to the COVID-19 pandemic.	19%		14%	14%	19% C	22% BC	21%	16%	23% G
I have been laid off, furloughed, or lost my job due to the COVID-19 pandemic.	15%		16% C	11%	13%	16% C	22% G	12%	18% G
I am a healthcare worker (e.g., nurse, doctor, paramedic) and have been working full time or over-time during the COVID-19 pandemic.	12%		6%	6%	8%	16% BCD	10%	9%	17% G
I lost or had to give up my health insurance coverage due to the COVID-19 pandemic.	9%		7%	5%	6%	12% BCD	12% G	6%	13% G

BASE: ALL QUALIFIED HEALTHCARE CONSUMERS: n=4188

Q602. Which of the following, if any, are true of/for you? Please enter a response in each row.