



Evolving U.S. Healthcare Needs and Attitudes During COVID-19

Survey finds deep concern over staff health, wide ranging unmet needs and emerging technology priorities

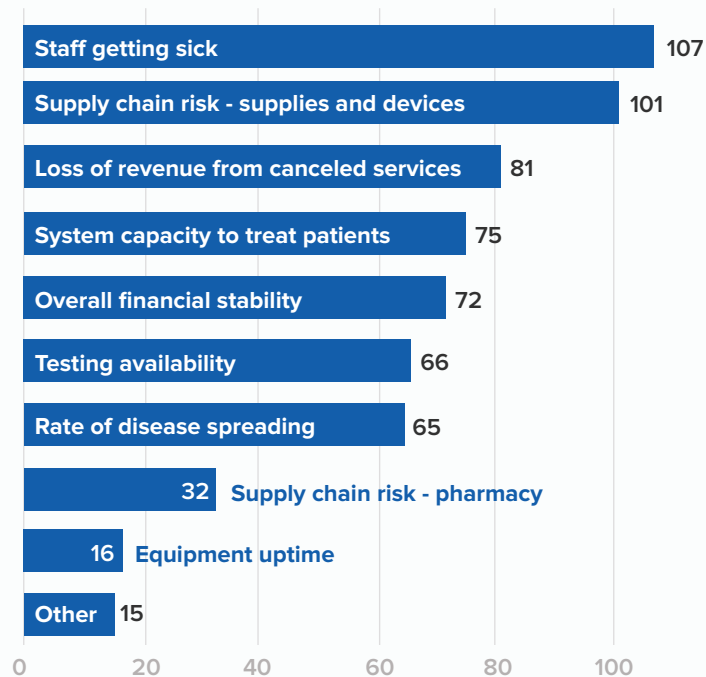
A recent survey of U.S. hospital executives explored the impact of COVID-19 on their organizations – their concerns, the impact on their operations and their changing priorities.

Sage Growth Partners (SGP) conducted the survey during the week of April 6 to explore hospital executives' perspectives on the impact of COVID-19. We found, perhaps unsurprisingly, that they had several concerns—with worries about staff getting sick, the supply chain being disrupted, and revenues declining dominating the long list.

The 138 survey respondents, from a diverse set of hospital types and geographies*, included key decision makers from a broad range of executive-level roles. 78% of respondents were from the C-suite, with CEOs representing 19%, CFOs 15%, CNOs 14% and CIOs 9%.

1. Staff getting sick and supply chain risk dominate executive mindshare.

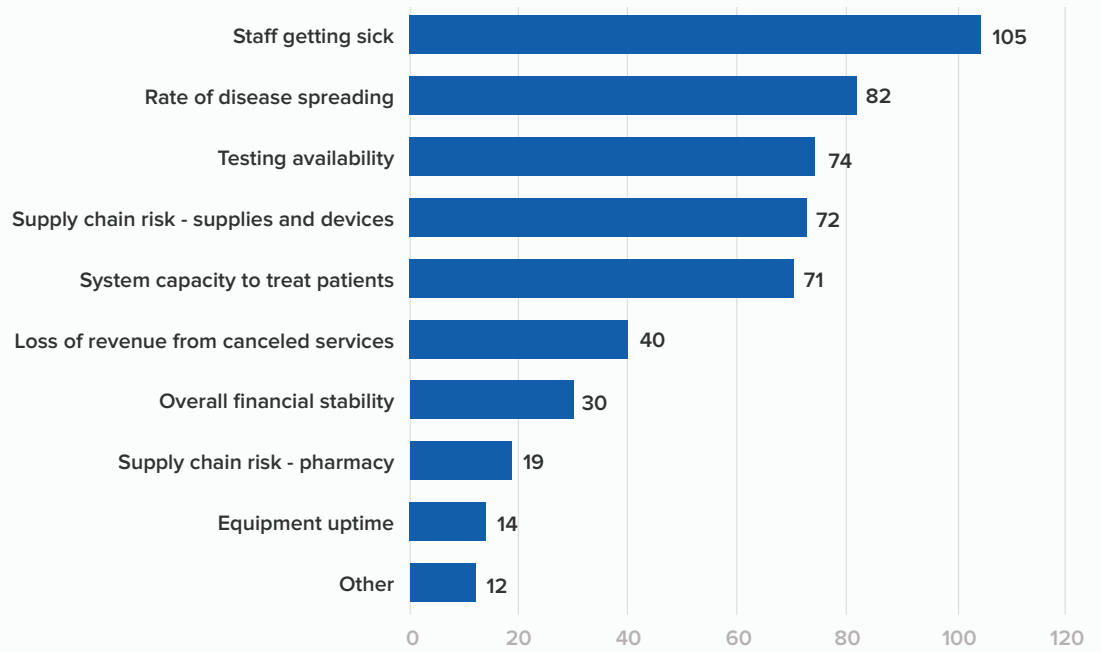
Executives also had high levels of concern about key financial and operational impacts of COVID-19 – as well as other areas.



*Respondents were from hospitals and health systems ranging in size from fewer than 150 beds to those with over 400 beds. 14% of respondents were from hospitals with fewer than 150 beds, 58% from hospitals with 150-400 beds and 28% from hospitals with over 400 beds. The majority (54%) of hospitals were acute care and 22% were critical access hospitals, with the remainder from childrens, long-term acute care, psychiatric, VA and rehabilitation hospitals. Geographic representation was broad, with greatest number of respondents (greater than 10%) coming from California and Texas.

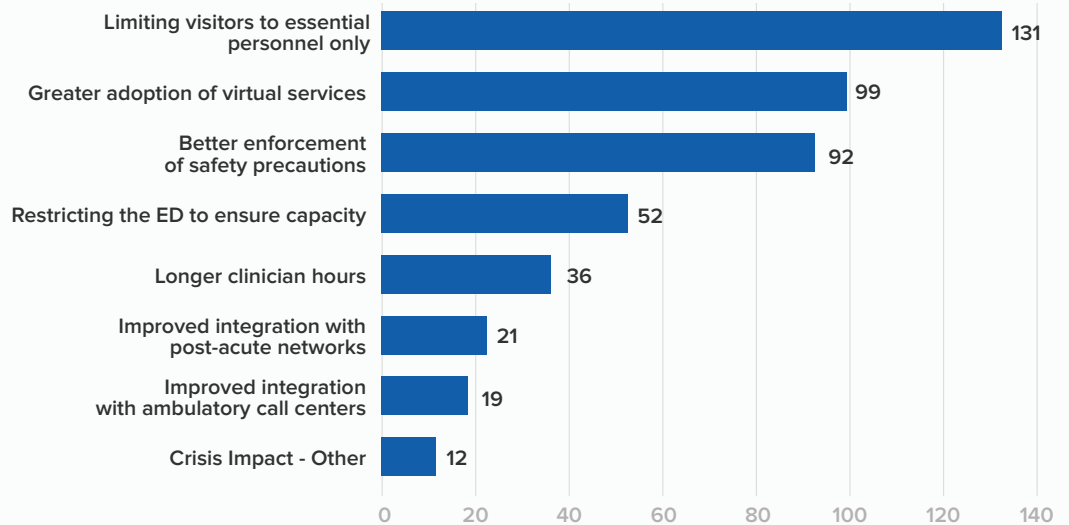
2. Worries of staff health also the dominant concern for clinicians.

Other care concerns such as rate of disease spread, testing availability, supply chain and capacity topped the list of major concerns.



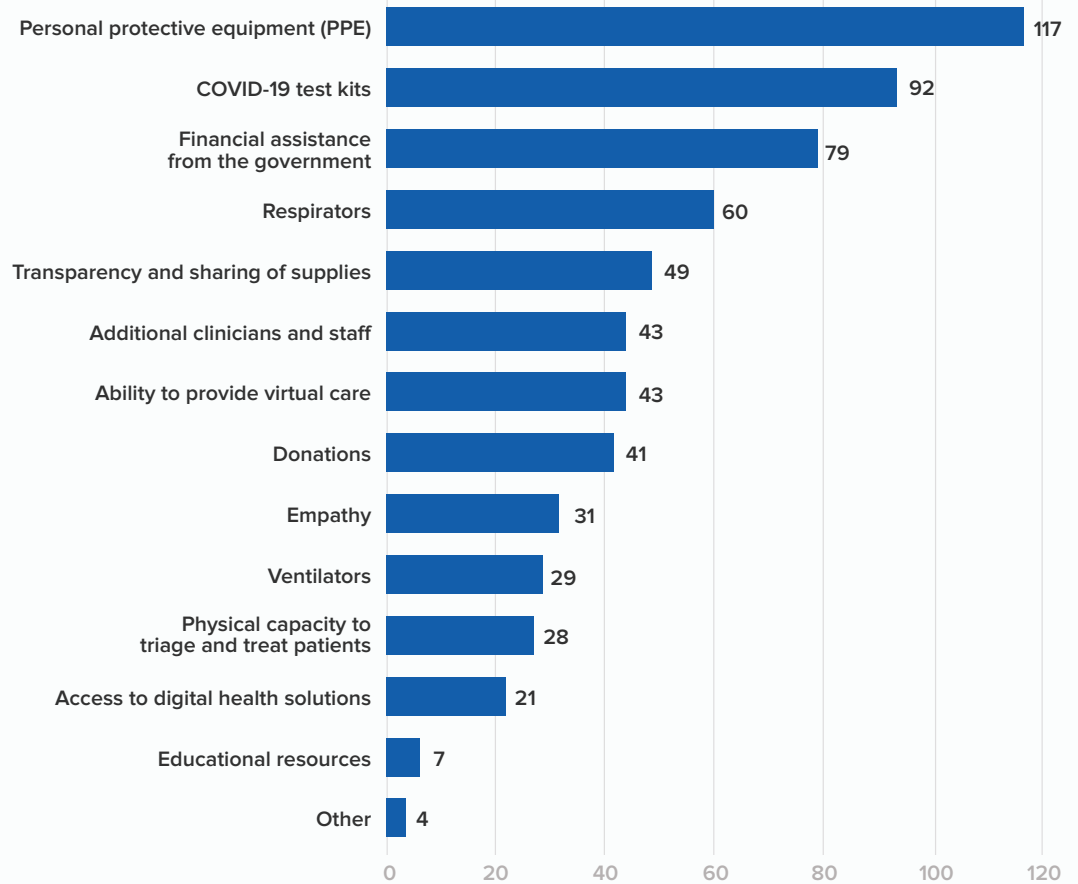
3. How hospitals operate is changing – with safety-related steps and virtual care as dominant changes.

Almost all respondents have limited visitors to essential personnel and the vast majority also noted the increased use of virtual care services and enforcement of safety precautions.



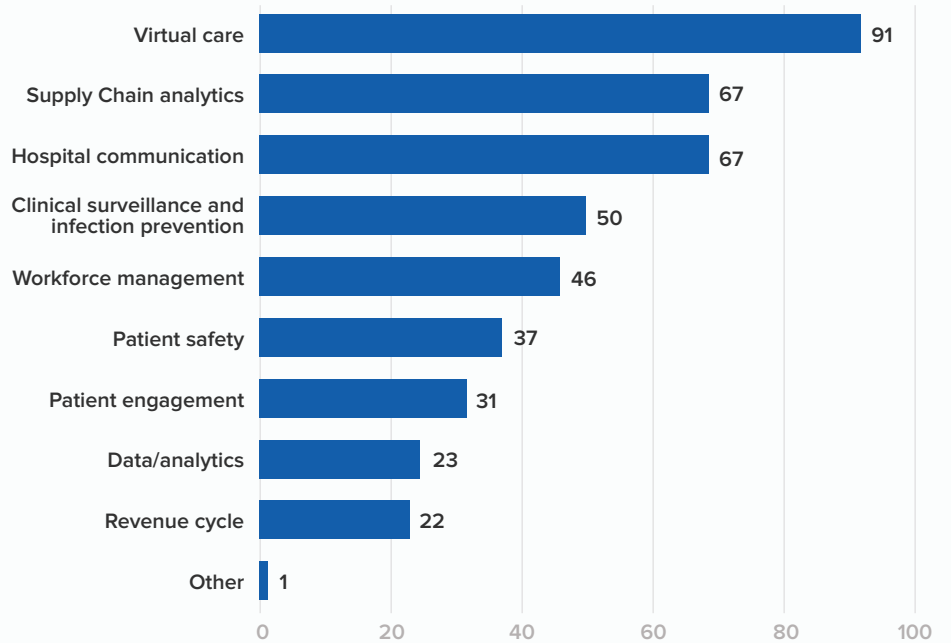
4. More PPD, test kits, respirators and financial assistance top the long list of desired solutions for hospitals.

Not surprisingly, hospital executives have many items on their list of needs that they'd like to see met.



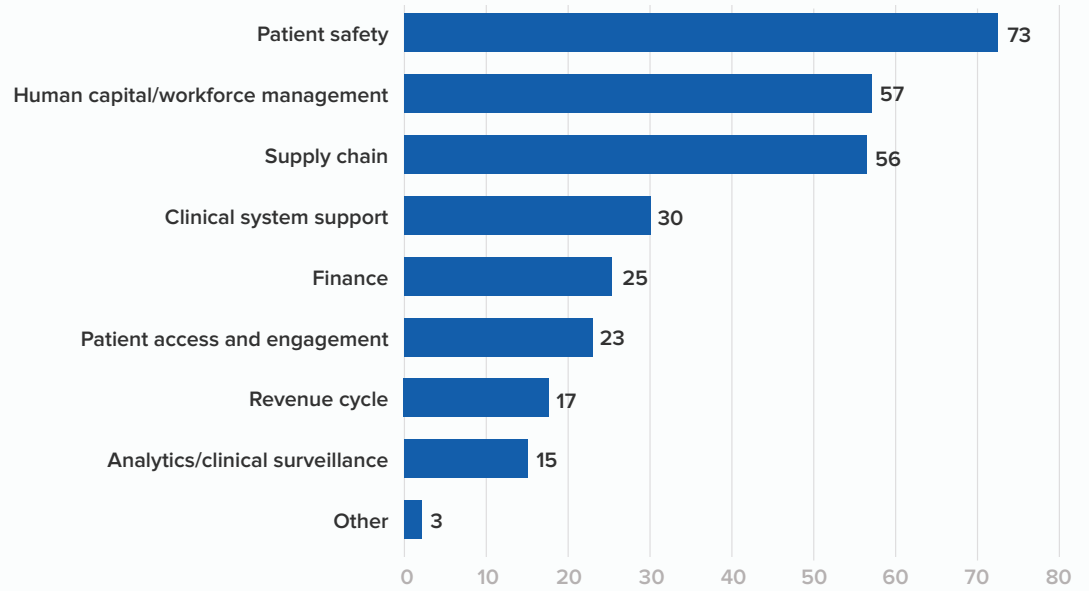
5. Virtual care and other solutions have risen in importance of late.

The crisis is bringing oft overlooked technologies to the fore. Executives now also clearly place an increased importance on hospital communication, supply chain analytics and clinical surveillance.



6. Patient safety tops the list of things competing for C-Suite mindshare.

While patient safety is always a concern, it has historically rivaled revenue cycle and operational efficiency in the minds of the C-suite. Taking appropriate center stage, it will be interesting to see how patient safety efforts evolve as the COVID-19 crisis wanes.



About Sage Growth Partners

Sage Growth Partners accelerates commercial success for B2B, B2B2C, and B2C healthcare organizations through a singular focus on growth. The company helps its clients thrive amid the complexities of a rapidly changing marketplace with deep domain expertise and an integrated application of research, strategy, and marketing.

Founded in 2005, Sage Growth Partners is located in Baltimore, MD, and serves clients such as Philips Healthcare, U.S. Renal Care, Quest Diagnostics, Vocera, Livongo, Olive, It's Never 2 Late, and Aperture.



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