

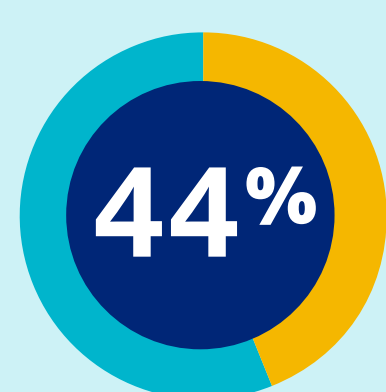


2020 Consumer Sentiment Survey Highlights

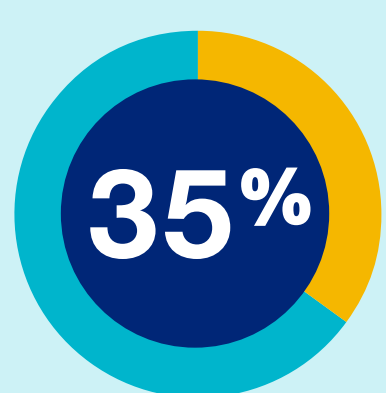


The fifth-annual UnitedHealthcare *Consumer Sentiment Survey* provides insights into Americans' health care knowledge, opinions and preferences during open enrollment.¹

Health Plan Preferences Amid COVID-19



44% of respondents said COVID-19 has influenced the health plan they intend to select for 2021.



35% of respondents said COVID-19 has spurred them to spend more time researching health plan options.

16% opting for an option with lower out-of-pocket costs.

11% looking for more well-being programs or resources.

10% seeking more comprehensive or richer benefits.

Technology & Transparency Trends



56% said it is likely they would use virtual care for medical services.

55% have used the internet or mobile apps to comparison shop for medical services in the last year.

47% said it is likely they would use virtual care for behavioral health issues.

25% of respondents consider online or mobile resources as their first option to evaluate health issues and symptoms.

About **1 in 4**  respondents would prefer a virtual relationship with a primary care physician.

Open Enrollment Preparedness



78% of respondents with health benefits said they are prepared for open enrollment season.



84% said it was "important" to have vision and dental coverage options during open enrollment.

¹2020 UnitedHealthcare Consumer Sentiment Survey. Survey was conducted Sept. 11-13, 2020, using Engine INSIGHTS CARAVAN® online survey of 1,004 U.S. adults 18 and older. The margin of error was plus or minus 3% at the 95% confidence level.