The COVID-19 pandemic is influencing consumer health behavior. Are the changes here to stay?

April 2020

A consumer survey from PwC’s Health Research Institute

The COVID-19 pandemic is changing the economy, the way we work and the health system. A comparison by PwC’s Health Research Institute (HRI) of American consumer sentiment before and during the pandemic reveals that people are accessing health information in new ways. Their trust has shifted as well. HRI, which surveyed 2,533 Americans between April 2 and 8, found that employers could play a greater role than ever in their employees’ health.

The delivery of care may look very different after the pandemic, HRI found. Much has been reported about the explosion of telehealth since the crisis began. HRI’s consumer survey found that new telehealth users include generally healthy people looking for a quick sick-care visit and, critically, people with more complex medical conditions who need to manage their health.

HRI also found that American consumers are taking on a more active role in the health system. For example, many people are willing to participate in clinical trials or share their personal data to help discover new treatments or ways of delivering care.

HRI’s results signal that US businesses could play an even bigger role in protecting the health of their workers, that the health system likely will make more room for telehealth and other forms of virtual care, and that the American consumer may take a more active role in managing health and participating in a system that is being remade.
Delayed doctor visits, procedures and prescriptions could have long-term impacts on health, productivity and costs

Consumers are concerned about the impact of the pandemic on their health and wallets, and are behaving accordingly. Thirty-two percent of survey respondents told HRI that they had already made or were planning adjustments to their spending on healthcare visits as a result of COVID-19.

Seventy-eight percent of these consumers said they would skip at least one visit such as a well visit, maintenance visit for a chronic illness, elective procedure or recommended lab test or screening. Thirty percent predicted that their spending on healthcare visits would increase overall.

Fifty-two percent of consumers who regularly take medications reported that they were worried about getting their prescriptions when they need them during the pandemic; 17% of those reported experiencing delays. Twenty-two percent of all consumers reported that they had already made or were planning adjustments to their spending on medications. Forty-two percent of these consumers said they would spend more because of better adherence, while 22% said they would “stretch” the medication they had by skipping doses. Nine percent said they planned to stop taking their medications altogether to save money. Some consumers indicated that they planned to consider more over-the-counter options or “think twice” about asking their doctor for a prescription the next time they get sick.

Implications

Delaying procedures, reducing spending on preventive care and chronic care, and decreasing adherence to medications may have negative long-term impacts on health status, although the extent is unknown.

Getting consumers to come back for care may depend on how much trust the health system can build with them over the next few months. Helping newly unemployed consumers find insurance through Medicaid, ACA insurance exchanges, and other means should be a priority for the health system.
An explosion in telehealth unveils new uses and users

HRI’s survey found that 5% of American consumers reported that they or a family member used telehealth for the first time during the pandemic. Applied to the broader US population, this could mean about 16.5 million Americans have started using telehealth in the past couple of months alone. Eighty-eight percent of these new users said they would use it again.

The vast majority of new telehealth users were white, had insurance through an employer, had chronic conditions and were middle-aged.

Implications

Telehealth is being used not just for the occasional sniffle or rash, but also to help manage chronic conditions during the pandemic. If this continues, employers may be able to reduce absenteeism caused by employees taking time off for in-person visits.

Employers should consider offering new telehealth benefits or promoting those they already provide. Sixty-two percent of individuals with employer-based insurance have a chronic or complex chronic disease, making up 85 percent of total employer-based healthcare spending, according to a recent HRI report on medical cost trend.

During the pandemic, have you or a family member received healthcare treatment for the first time through a video telehealth visit?

Breakdown by health status of the 5% of consumers who said they used telehealth for the first time during the pandemic

- 37% Chronic
- 12% Mental health
- 9% Healthy family
- 8% Healthy enthusiasts
- 3% Healthy skeptics

PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
As employees return to work, employers have opportunities to help them manage the pandemic’s after effects

Sixty-two percent of employed consumers told HRI that their employers have offered them at least one new benefit to help them cope with the pandemic. Most often they said they were being offered work-from-home options, health advice and expanded sick leave. Consumers working in banking and capital markets, in the pharmaceutical and life sciences sector, and in telecommunications were most likely to report that new benefits were being offered.

Implications

HRI found that employers have opportunities to offer new or expanded benefits during and after the pandemic and as employees return to work, especially childcare options or reimbursement and new mental health or stress-related benefits. The stress and uncertainty inflicted by the crisis likely will have lasting effects.

### Has your employer offered any new benefits to help you cope with the COVID-19 pandemic?

Please select all that apply.

- Work-from-home: 32%
- Information on how to cope with the pandemic, such as health advice: 19%
- Expanded sick leave: 17%
- More flexibility such as allowing for lost time to care for dependents at the same pay: 15%
- New telehealth options: 10%
- Help with basic living necessities such as food, hand sanitizer, paper products: 9%
- New mental health or stress-related benefits: 8%
- Child care options or reimbursement: 7%
- None of the above: 38%

Note: Based on a sample of 1,501 employed consumers

PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
Fifty-three percent of consumers reported that before the COVID-19 outbreak, at least one social or environmental factor—such as sleep, affordable housing or childcare—was affecting their ability to adopt a healthy lifestyle. During the pandemic, 61% reported to HRI that they are affected by at least one of these social determinants of health.

Across insurance types, HRI found the biggest differences between the pandemic and the time preceding it are related to feelings of isolation or loneliness, spending too much time on technology and lacking access to healthy food and a safe place to exercise. More uninsured consumers cited a lack of motivation as a factor hampering their ability to stay healthy.

Implications

What happens outside the doctor’s office is more important than ever. It is important to engage a wide variety of organizations, including nonhealth organizations, to help consumers with the challenges they are facing. For example, employers will need to become more involved in these social determinants to help keep the workforce healthy.
Many consumers are willing to share personal data or participate in clinical trials to find new treatments

HRI’s survey found that consumers still trust their doctors most when it comes to sharing their personal health data. Eighty-four percent of respondents said they would be at least somewhat willing to share data with their doctors to help discover new treatments or new ways of delivering care.

When asked about participating in pharmaceutical research to develop a treatment or vaccine for COVID-19, 58% of consumers said they would be at least somewhat willing to do so. Findings did not vary significantly based on race or age, but men and those with higher incomes were more willing to participate than women and those with lower incomes.

Implications

The pharmaceutical and life sciences sector should move quickly to capitalize on consumer activation. Traditionally the doctor has been the intermediary between drug companies and patients, but HRI found that 50% of consumers would share their data directly with a drug company.

Aside from the COVID-19 pandemic, how willing are you to provide your personal health data to the following to help discover new treatments or ways of delivering care?

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<thead>
<tr>
<th>Other research center (e.g., genomics company)</th>
<th>Very willing</th>
<th>Somewhat willing</th>
<th>Somewhat unwilling</th>
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<td>24%</td>
<td>28%</td>
<td>17%</td>
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<tr>
<td>Drug company</td>
<td>22%</td>
<td>28%</td>
<td>16%</td>
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<tr>
<td>University research center</td>
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<td>Local health system or hospital</td>
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<tr>
<td>My own doctor</td>
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PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
Social distancing varies most widely by race and age

While various factors influence consumers’ ability to socially distance, such as the type of work they do or the nature of their home environment, HRI’s survey found that the practice of social distancing among consumers varied most widely by race and age. Ninety-five percent of consumers aged 65 or older said they were practicing social distancing. This older age group is generally at higher risk of serious illness from COVID-19 and is less likely to be employed than younger adults, giving them more motivation and ability to isolate themselves. By contrast, 58% of 18- to 24-year-olds said they were socially distancing.

HRI found that nonwhite consumer groups also were less likely to say they were social distancing. Some of these groups suffer disproportionately from chronic diseases such as hypertension, diabetes, and heart and lung diseases. Researchers have found evidence that comorbidities are linked to poorer outcomes for people hospitalized with COVID-19.

Implications

An analysis of the preventive measures that different groups of consumers are taking to limit the spread of the novel coronavirus is important for targeting communications and planning interventions as the economy starts to reopen and the threat of the virus remains.
The pandemic has created opportunities for health systems to increase patient communication and loyalty

American consumers told HRI that they were getting health information from three or four sources on average during the pandemic. They reported getting this information most frequently from local news organizations. Local and national news providers topped the list for all age groups, except consumers aged 18 to 24. This age group was as likely to say they have received health information from social media as from local news outlets.

Notably, only 14% of consumers told HRI that they have received health information from their health system. This is true even of certain vulnerable populations: Less than 20% of consumers considered more susceptible to the effects of COVID-19 based on health status said they have received information from their health system or doctors. More consumers told HRI that they were receiving health information from their employers (16%), whom they trust less for accurate information.

**Implications**

Health system communication with patients tends to be transactional. Health systems should focus on increasing patient loyalty by staying connected with them even when they are not directly interacting with the system. Employers also have an opportunity to increase trust with employees during the pandemic by being accurate sources of health information.

**Where are you getting health information about what you should do during the COVID-19 pandemic?**

Please select all that apply.

- Getting information from source
- Ranking source in top 3 trusted sources

*PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020*
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About this research

From April 2 to 8, PwC’s Health Research Institute conducted an online survey of 2,533 US adults representing a cross section of the population in terms of insurance type, age, gender, income and geography.

HRI also screened survey respondents to obtain data on its seven proprietary consumer health segments, which were created using data from the Medical Expenditure Panel Survey. These segments include the Frail elderly: Over the age of 75, living at home, facing health issues related to falls or dementia and suffering generally poor health; Complex chronic: Have one or more chronic diseases affecting multiple body systems and often requiring complicated disease management; Chronic disease: Have problems affecting a single body system such as hypertension and require uncomplicated disease management; Mental health: Mental illness is primary health issue versus comorbid condition, face depression and mood disorders, post-traumatic stress disorder, addictions and suicidal ideations; Healthy families: Households with healthy dependent children under the age of 18; Healthy adult enthusiasts: Value a regular physical and wellness/coaching services, and get recommended screenings; Healthy adult skeptics: Generally avoid interacting with the health system and are less likely to have health insurance than other consumer groups.

The survey collected data on consumer perspectives about the healthcare landscape before and during the COVID-19 pandemic, including their use of health services and thoughts about how they will interact with the health system in the future.

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