The COVID-19 pandemic is influencing consumer health behavior. What does this mean for healthcare providers?

Consumer survey findings from PwC’s Health Research Institute

May 2020

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.
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; 22% said this about medication spending. Consumers with complex chronic illness and those in healthy families were more likely than other groups to say they would adjust their spending on healthcare visits or medications.

**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.

### As a result of the impact of COVID-19, have you already or do you plan to adjust your spending on healthcare visits or medications?

<table>
<thead>
<tr>
<th>Consumer Segment</th>
<th>Medications</th>
<th>Healthcare visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthy families</td>
<td>34%</td>
<td>41%</td>
</tr>
<tr>
<td>Healthy skeptics</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Complex chronic</td>
<td>32%</td>
<td>41%</td>
</tr>
<tr>
<td>Mental health</td>
<td>22%</td>
<td>32%</td>
</tr>
<tr>
<td>Chronic</td>
<td>14%</td>
<td>25%</td>
</tr>
<tr>
<td>Healthy enthusiasts</td>
<td>12%</td>
<td>21%</td>
</tr>
</tbody>
</table>

PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
Note: Excludes "Frail elderly" due to inadequate sample.
Delayed doctor visits, screenings and procedures could have long-term impacts on health, productivity and costs

Of the 32% of consumers surveyed who said they already have or plan to adjust their spending on healthcare visits, consumers with a primary diagnosis of mental illness and those in healthy families were most likely to say they would skip an annual physical (47%). Consumers with chronic disease were the most likely to say that they already have or plan to skip elective procedures (30%) and recommended tests or screenings (29%).

Consumers with chronic illness were least likely to tell HRI they expected to increase their spending on healthcare visits (20%).

**Implications:** 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.

*As a result of the COVID-19 pandemic, how have you adjusted or are you considering adjusting your spending on healthcare visits?*

![Bar chart](chart.png)

PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
Base = 32% of respondents (782) who said they already are or plan to adjust spending on healthcare visits. Excludes frail elderly due to small sample.
Delayed medications could have long-term impacts on health, productivity and costs

As a result of the COVID-19 pandemic, how have you adjusted or are considering adjusting your spending on medications?

PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
Base = 549 individuals surveyed who said “yes, I plan to” or “yes, I already have” adjusted spending on medications.
Excludes frail elderly due to small sample size.

Implications: Decreasing adherence to medications may have negative long-term impacts on health status. Providers might consider the retail pharmacy, with its skills in medication management, round-the-clock glucose monitoring and personalized health education, as a partner in helping drive adherence during the pandemic.

Forty-two percent of consumers surveyed who are adjusting their spending said they would spend more because of better adherence. Consumers with complex chronic conditions were most likely to expect to spend more (47%) (see figure). They were also most likely to say they would “stretch” the medication they had by skipping doses (30% compared to 22% overall).

Nine percent of all consumers surveyed who are adjusting spending said they planned to stop taking their medications altogether to save money. Consumers with a primary diagnosis of mental illness were more likely than most other consumers to indicate that they planned to “think twice” about asking their doctor for a prescription the next time they get sick. About one-third (34%) of complex chronic consumers said they will consider more over-the-counter options.

Implications: Decreasing adherence to medications may have negative long-term impacts on health status. Providers might consider the retail pharmacy, with its skills in medication management, round-the-clock glucose monitoring and personalized health education, as a partner in helping drive adherence during the pandemic.
Most routine in-hospital or in-office treatments delayed, or alternate arrangements being made

Ten percent of consumers reported that they routinely receive medication treatment in hospitals or clinics such as dialysis and chemotherapy. Nearly three-quarters (72%) of those consumers reported they or their doctor are delaying care, following an alternative treatment plan or other plan. These are typically patients with complex chronic issues.

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

What impact is the COVID-19 pandemic having on how you or your household member receive your routine in-office or in-hospital treatments?

- My doctor is delaying/will delay treatments: 30%
- I am choosing to delay/will delay treatments: 28%
- No impact: 26%
- My doctor has recommended an alternative treatment plan: 10%
- I don’t know: 3%
- Other: 3%

PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
Base = 10.5% of respondents (266) who receive routine in-hospital / in-office treatments
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.

Telehealth is being used not just for the occasional sniffle or rash, but also to help manage chronic conditions during the pandemic. The most common use was for ongoing treatment of a physical condition or ailment (44%). About one-third (30%) of consumers used it for suspected COVID-19 infection.

Implications: As the nation continues to grapple with the pandemic, providers must plan for their own workforces as they play central roles in addressing the human toll of the pandemic. One strategy is to virtually care for patients, thereby protecting patients and caregivers during the pandemic. These services also may be a way for quarantined asymptomatic clinicians to work as caseloads increase. Beyond the pandemic, providers can use telehealth to improve adherence among patients with chronic illness by reducing the need for them to take time off of work for in-person visits.
Consumers with mental health conditions are most challenged by social determinants of health during the pandemic

More than half (53%) 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.

Regardless of consumer health status, 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.

Consumers with a primary diagnosis of a mental illness were more likely to be challenged by social determinants of health. More than three-quarters (76%) of these consumers said they were struggling with at least one social determinant of health.

Implications: What happens outside the doctor’s office is more important than ever. It is important to engage a wide variety of organizations, including non-health organizations, to help consumers with the challenges they are facing.

Which, if any, of the following challenges in your daily life are impacting your ability to adopt a healthy lifestyle?

<table>
<thead>
<tr>
<th>Limited choice of healthy food options</th>
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<tbody>
<tr>
<td>Chronic</td>
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<tr>
<td>Complex chronic</td>
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<tr>
<td>Healthy enthusiasts</td>
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<tr>
<td>Healthy families</td>
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<tr>
<td>Healthy skeptics</td>
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<tr>
<td>Mental health</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Access to safe environment to exercise in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chronic</td>
</tr>
<tr>
<td>Complex chronic</td>
</tr>
<tr>
<td>Healthy enthusiasts</td>
</tr>
<tr>
<td>Healthy families</td>
</tr>
<tr>
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<tr>
<td>Mental health</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Feeling isolated or lonely</th>
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<tbody>
<tr>
<td>Chronic</td>
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<tr>
<td>Complex chronic</td>
</tr>
<tr>
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<td>Mental health</td>
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</table>

<table>
<thead>
<tr>
<th>Too much time spent using technology</th>
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</thead>
<tbody>
<tr>
<td>Chronic</td>
</tr>
<tr>
<td>Complex chronic</td>
</tr>
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PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
Note: Excludes “Frail elderly” due to inadequate sample.
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.

**Implications:** Providers should solidify their trust position with patients and continue serving as the intermediary between drug companies and patients.

**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?**

<table>
<thead>
<tr>
<th>Entity</th>
<th>Very willing</th>
<th>Somewhat willing</th>
<th>Not willing</th>
<th>Somewhat unwilling</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>My own doctor</td>
<td>59%</td>
<td>25%</td>
<td>5%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Local health system or hospital</td>
<td>43%</td>
<td>32%</td>
<td>9%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>University research center</td>
<td>31%</td>
<td>33%</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Other research center (e.g., genomics company)</td>
<td>24%</td>
<td>28%</td>
<td>17%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Drug company</td>
<td>22%</td>
<td>28%</td>
<td>16%</td>
<td>18%</td>
<td>16%</td>
</tr>
</tbody>
</table>

PwC Health Research Institute COVID-19 Consumer Survey, April 2-8, 2020
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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About the PwC Health Research Institute

PwC’s Health Research Institute (HRI) provides new intelligence, perspectives and analysis on trends affecting all health-related industries. The Health Research Institute helps executive decision-makers navigate change through primary research and collaborative exchange. Our views are shaped by a network of professionals with executive and day-to-day experience in the health industry. HRI research is independent and not sponsored by businesses, government or other institutions.

PwC Health Research Institute

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