The COVID-19 pandemic is influencing consumer health behavior. What does this mean for pharmaceutical and life sciences companies?

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.
The COVID-19 pandemic is influencing consumer health behavior. What does this mean for pharmaceutical and life sciences companies?

Some consumers are adjusting medication spending due to the pandemic

Consumers are concerned about the impact of the pandemic on their health and their wallets, and are behaving accordingly.

Of the 65% of consumers who said they or a household member takes medications routinely, more than half (52%) worry about getting their medications, and 17% have already experienced delays.

Twenty-two percent of all consumers reported that they had already made or were planning adjustments to their spending on medications (see figure).

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

![Graph showing medication spending adjustments]
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 (29% 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.

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Chronic</th>
<th>Complex chronic</th>
<th>Mental health</th>
<th>Healthy enthusiasts</th>
<th>Healthy families</th>
<th>Healthy skeptics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spend more because of better adherence</td>
<td>37%</td>
<td>39%</td>
<td>36%</td>
<td>43%</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Think twice before asking my doctor for a prescription when I get sick</td>
<td>34%</td>
<td>34%</td>
<td>36%</td>
<td>39%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Look for more over-the-counter medications</td>
<td>34%</td>
<td>32%</td>
<td>29%</td>
<td>28%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>“Stretch” some of my medications by skipping doses to save money</td>
<td>24%</td>
<td>29%</td>
<td>26%</td>
<td>15%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Spend more to fill my prescription for a longer period of time (e.g., 90 days vs. 30 days)</td>
<td>19%</td>
<td>22%</td>
<td>18%</td>
<td>17%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Stop taking some or all of my medications to save money</td>
<td>9%</td>
<td>8%</td>
<td>11%</td>
<td>6%</td>
<td>10%</td>
<td>14%</td>
</tr>
</tbody>
</table>

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.
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
Half of consumers are willing to share personal data with drug companies 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.

**Implications:** 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. The pharmaceutical and life sciences sector should move quickly to capitalize on consumer activation.

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?

- **Very willing**
- **Somewhat willing**
- **Somewhat unwilling**
- **Not willing**
- **Not sure**

<table>
<thead>
<tr>
<th></th>
<th>Very willing</th>
<th>Somewhat willing</th>
<th>Somewhat unwilling</th>
<th>Not willing</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
Virtual clinical trials may be key to developing a treatment or vaccine for COVID-19

Fifty-eight percent of consumers surveyed by HRI said that they would be at least somewhat willing to participate in pharmaceutical research to develop a treatment or vaccine for COVID-19. Findings did not tend to 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.

The ability to conduct clinical trials virtually was attractive to most consumers. When asked which factors would make them more likely to participate, the ability to participate from home using telehealth was most influential in increasing the likelihood of participating. Sixty-two percent of consumers said the ability to do so would make them more likely to participate, followed by local travel to the clinical trial site (46%).

Implications: Travel has been a known deterrent for clinical trial participation. Exploring options to decrease commute is the key to boost clinical trial participation, HRI found.

If there was an opportunity to participate in pharmaceutical research (e.g., a clinical trial) to develop a treatment or vaccine for COVID-19, how willing would you be to participate?

- Very willing: 28%
- Somewhat willing: 30%
- Somewhat unwilling: 10%
- Not willing: 15%
- Not sure: 17%

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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Contacts

To have deeper conversations about how this subject may affect your business, please contact:

Kelly Barnes
US and Global Health Industries Leader
kelly.a.barnes@pwc.com

Michael Connolly
US Health Industries Consulting Leader
mike.connolly@pwc.com

Karen Young
US Pharmaceutical and Life Sciences Leader
karen.c.young@pwc.com

Gurpreet Singh
US Health Services Leader
gurpreet.singh@pwc.com

Benjamin Isgur
Health Research Institute Leader
benjamin.isgur@pwc.com

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