



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

June 1, 2020

# Agenda

## Welcome and Introductions

- Jennifer Covich Bordenick, Chief Executive Officer, eHealth Initiative and Foundation

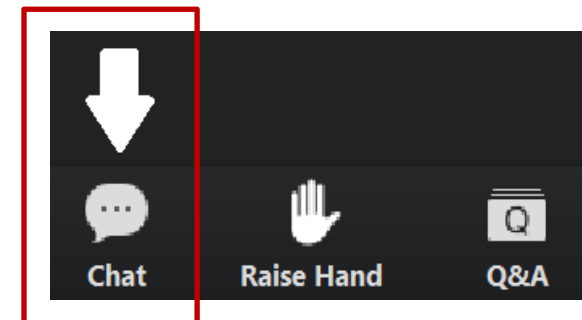
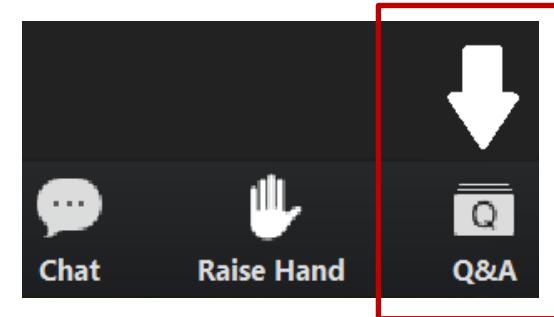
## Discussion with:

- Benjamin Isgur, Health Research Institute Leader, PwC
- Sarah Haflett, Health Research Institute Director, PwC
- Sundar Subramanian, Health Industries Advisory Strategy Consulting and Growth Platforms Leader, PwC US
- Sierra Hawthorne, Health Industries Advisory Director, PwC



# Housekeeping

- **All participants are muted**
- **To ask a question to be answered by speakers:**
  - Use the “Q&A” box found on the bottom of your screen
  - We will address as many as possible after the presentations
- **For help with technical difficulties and non-speaker questions:**
  - Use the “chat” box and we will respond as soon as possible
- Slides and a recording of today’s presentation will be available for download on eHI’s Resource page: [www.ehidc.org/resources](http://www.ehidc.org/resources)



# Our Mission

Convene executives who are transforming healthcare through technology and innovation.





# Our Leadership



Booz | Allen | Hamilton



Google Cloud



# Areas of Focus



## TRANSPARENCY

Cost  
Transparency

Prior Authorization



## INTEROPERABILITY

FHIR in Plain  
English

Information  
Blocking



## PRIVACY

Non-HIPAA Data

Cybersecurity  
Med Devices

Health Data &  
National Security



## ANALYTICS

Social  
Determinants of  
Health

Artificial  
Intelligence,  
Predictive  
Analytics  
(Biosurveillance,  
Epidemics,  
Genomics)





## UPCOMING WEBINARS:

- **June 4** – Executive Insights with Patrick James, MD, Chief Clinical Officer, Health Plans and Policy, Quest Diagnostics
- **June 9** - Privacy Implications of Contact Tracing Apps
- **June 11** – After the Curve Flattens: What's Next for Healthcare and COVID-19?

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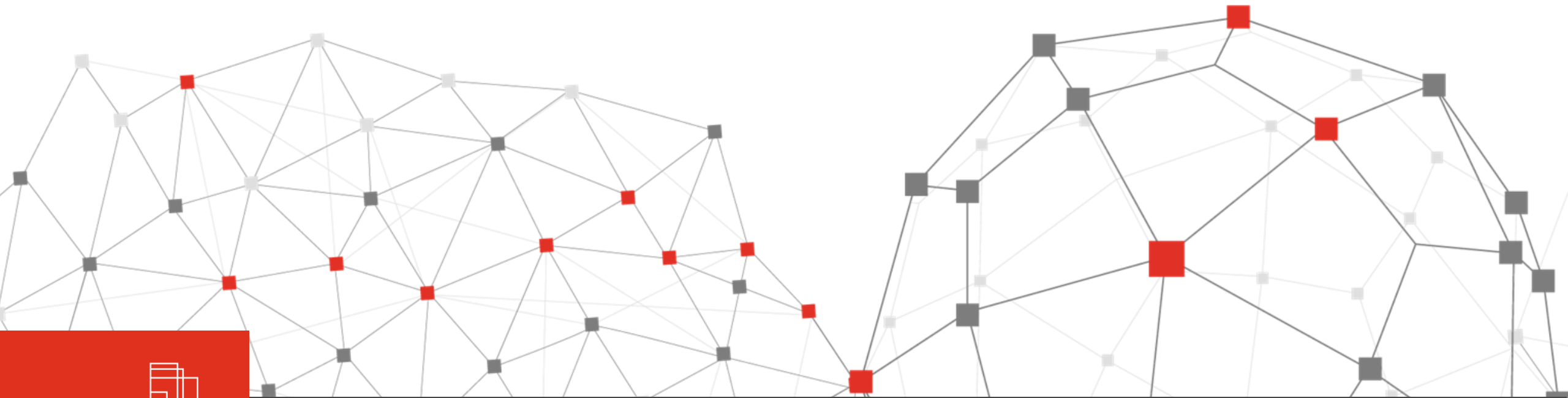
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# COVID-19

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



# Today's presenters

Speakers



**Ben Isgur**

PwC Health Research Institute Leader



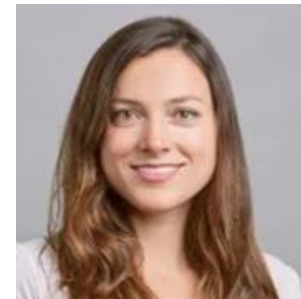
**Sundar Subramanian**

Health Industries Advisory Strategy  
Consulting and Growth Platforms Leader,  
PwC US



**Sarah Haflett**

PwC Health Research Institute Director



**Sierra Hawthorne**

Health Industries Advisory Director, PwC

# A consumer survey from PwC's Health Research Institute

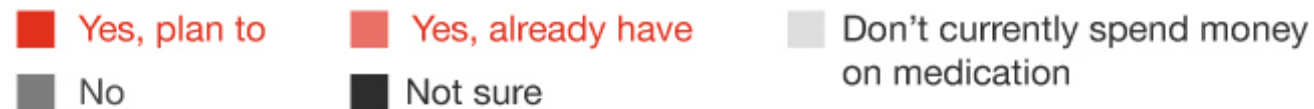
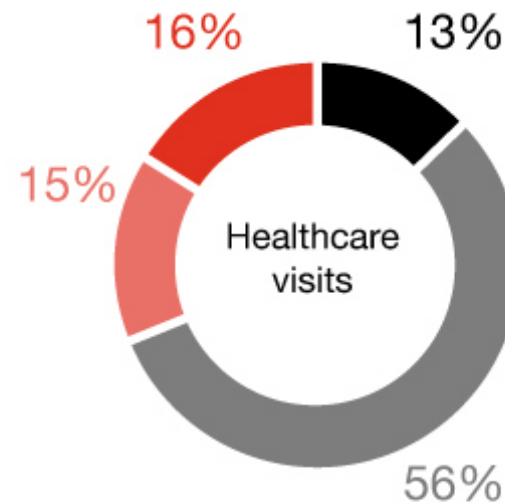
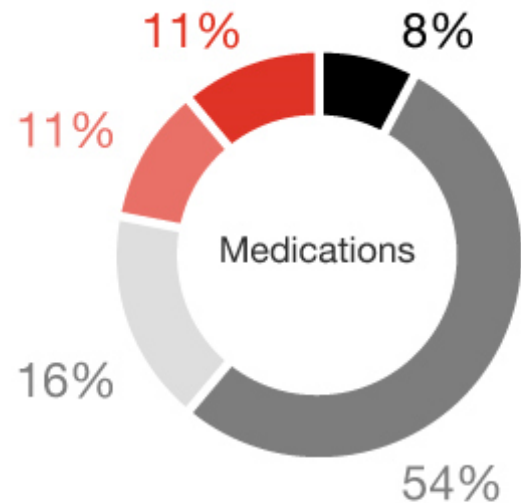
PwC's Health Research Institute (HRI) surveyed over 2,500 Americans between April 2th and 8th, comparing consumer sentiment before and during the pandemic.

The survey revealed that the pandemic has not only changed the economy and the way we work, but it's also altered the health system and how people interact with it.



# Delayed doctor visits, procedures and prescriptions could have long-term impacts on health, productivity and costs

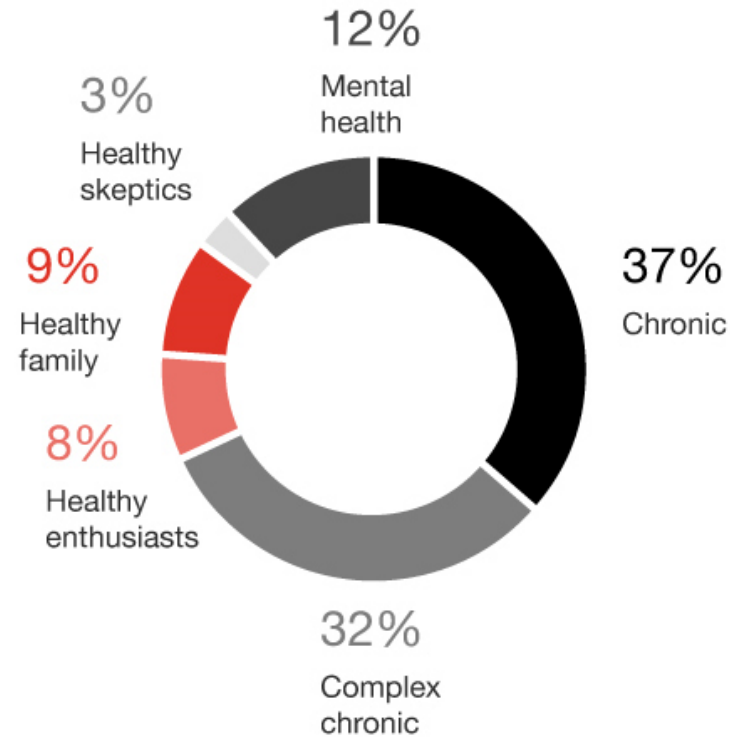
As a result of the impact of COVID-19, have you already or do you plan to adjust your spending on healthcare visits or medications?



# An explosion in telehealth unveils new uses and users

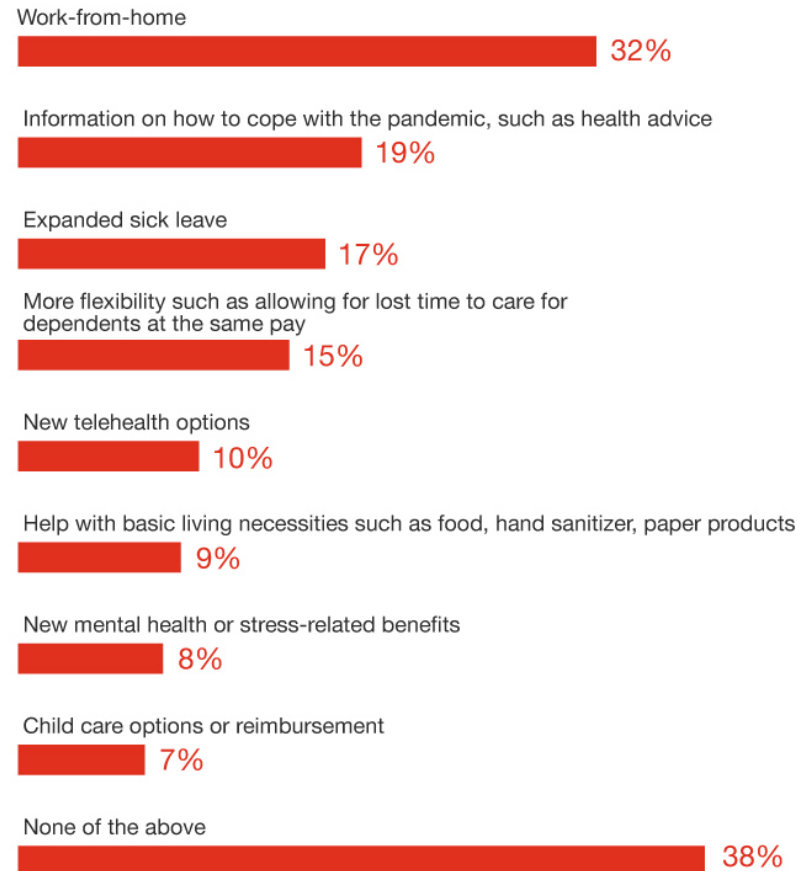
## During the pandemic, have you or a family member received healthcare treatment for the first time through a video telehealth visit?

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



# As employees return to work, employers have opportunities to help them manage the pandemic's after effects

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



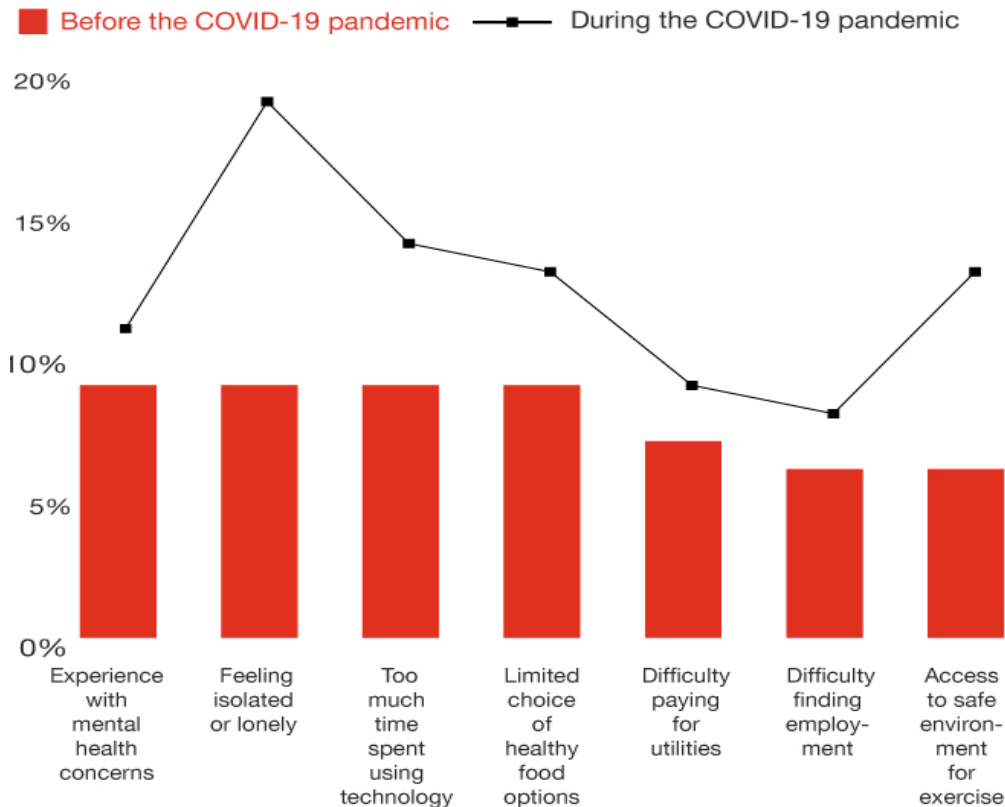
Note: Based on a sample of 1,501 employed consumers

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

# Americans report more problems with social determinants of health during pandemic

Which, if any, of the following challenges in your daily life are impacting your ability to adopt a healthy lifestyle? Please select all that apply.

Please select all that apply.

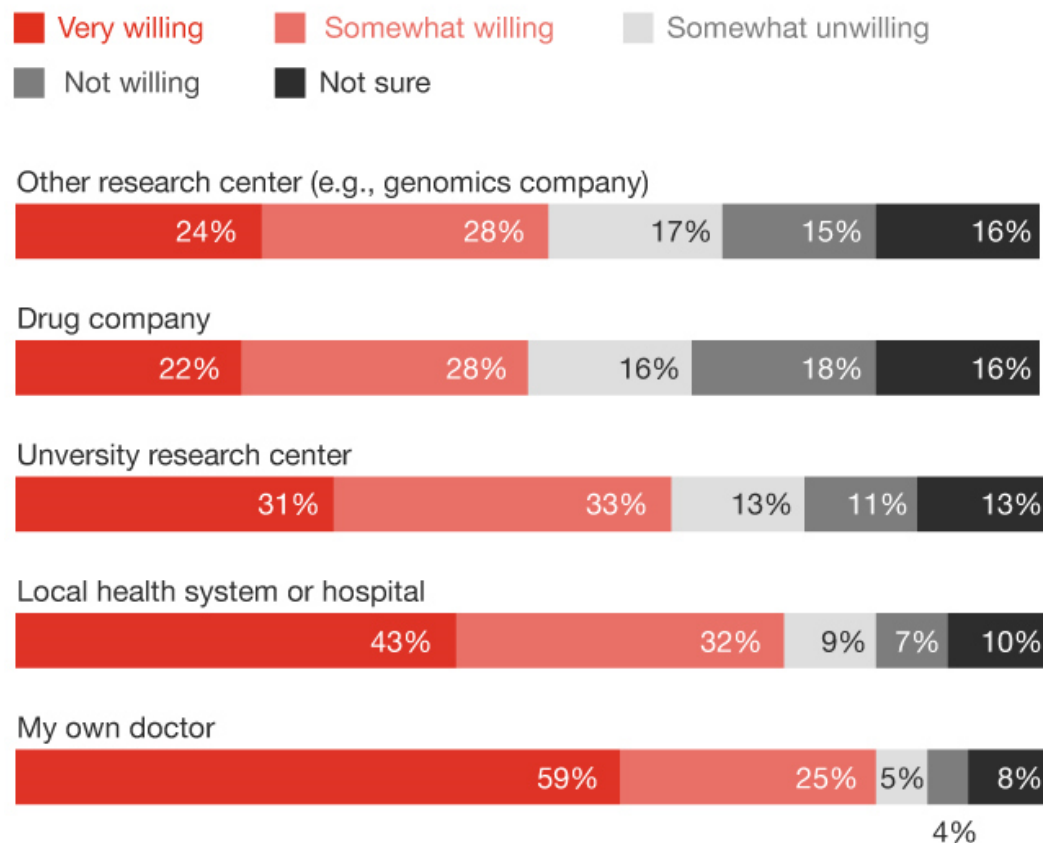


Note: Selected options displayed. Other options included: Not getting enough sleep, lack of motivation to become healthier, smoking, access to affordable housing, alcohol consumption, etc.

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

# Many consumers are willing to share personal data or participate in clinical trials to find new treatments

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?

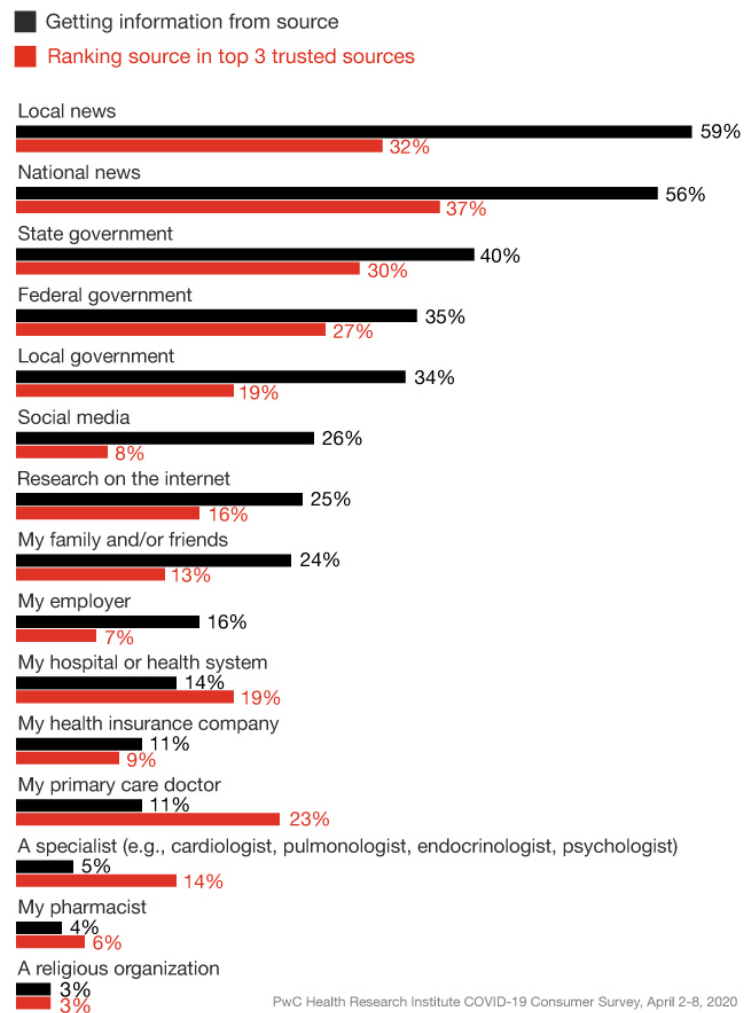




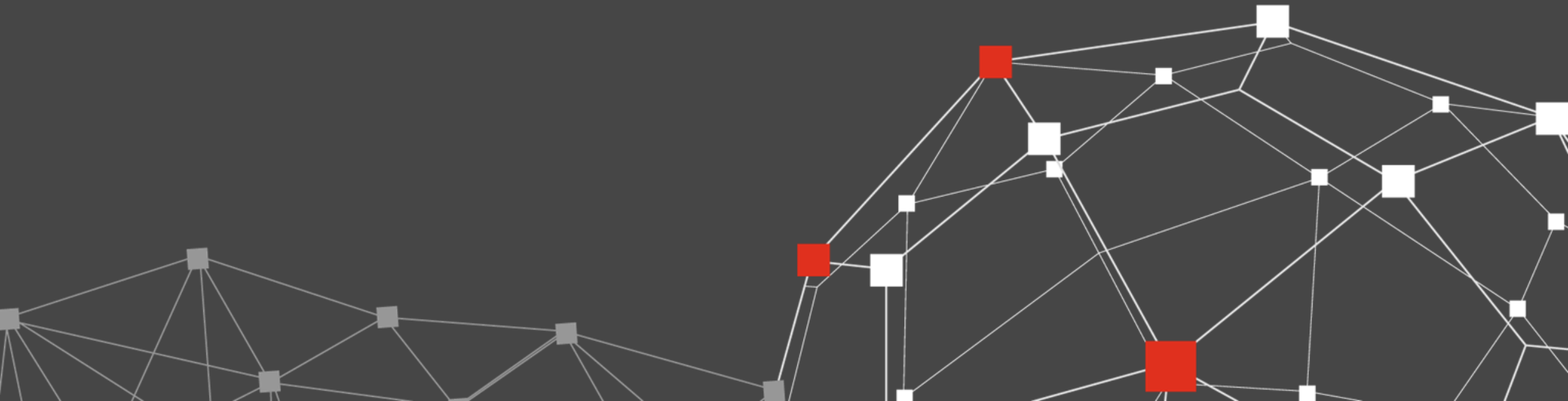
# The pandemic has created opportunities for health systems to increase patient communication and loyalty

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

Please select all that apply.



Dynamically simulate the progression of COVID-19, potential economic impact and consumer response



# Link consumer decision making, economic factors, and disease progression at a local level to dynamically simulate and respond in a resilient manner

- Uses a synthetic dataset to replicate the US adult population - including 1,600+ variables on social determinants, psychographics, behaviors and health
- Integrates health and disease modeling, economic observations, actuarial science, clinical and consumer behavior data - at the zipcode level



# One connected solution to help you answer key questions

## STRATEGIC

How might market recovery scenarios play out? What are the emerging “new normals”? What are the potential impacts of the pandemic on communities - including demand and behavior? What short-and long-term strategies should I employ?

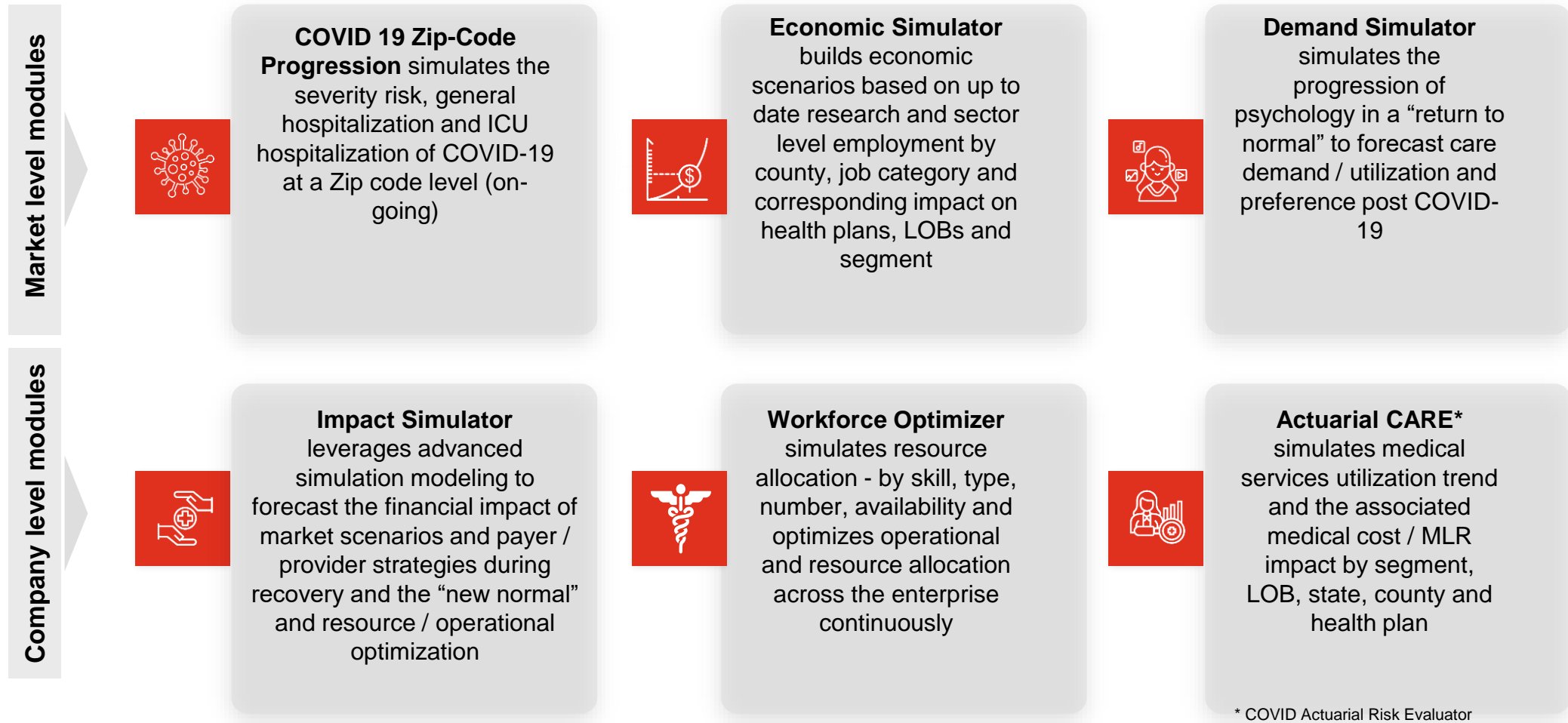
## OPERATIONAL

How can I allocate resources effectively to manage the uncertainty? How do I manage the reactivation on a daily basis and adapt decision making?

## FINANCIAL

What are the potential immediate and long term impacts to my financial forecasts? How do I enhance my recovery path and long term planning?

# Interconnected and dynamic modeling will be critical to ongoing decision making



# Implications

With actionable data in hand, health stakeholders—hospitals, payers, pharmaceutical and life sciences organizations and employers—can actively assess their response to COVID-19 and focus on recovering stronger in the transition to what's next.

- **Healthcare systems:** Estimate and adjust capacity needs at a local level; forecast re-activation volumes using clinical and behavioral modeling; design interventions and newer care pathways to address consumer concerns; evaluate current and future strategies; and manage financial and resource impacts dynamically.
- **Payers:** Understand changes to employment and member mix; assess and forecast medical cost and financial impacts; and evaluate future strategies at local and macro levels dynamically.
- **Pharmaceutical and life sciences:** Assess local demand for drugs; improve your distribution and value chain; and evaluate and evolve future strategies.
- **Employers:** Utilize scenario planning and modeling to develop and test return to work approaches and design plans protecting and managing workforce health and productivity.

# Additional resources

Read more from PwC Health Research Institute's report: [\*\*\*The COVID-19 pandemic is influencing consumer health behavior. Are the changes here to stay?\*\*\*](#)

Stay up to date on COVID-19 and other pressing matters for the health industry: PwC's weekly health industry newsletter lands in inboxes Friday mornings with news and analysis on policy, legislation, court decisions, the 2020 election campaign and more. To subscribe to the newsletter: [\*\*pwc.com/us/nextinhealth\*\*](https://pwc.com/us/nextinhealth)

[\*\*Understand the broad pandemic implications on your healthcare business:\*\*](#) Dynamically simulate the healthcare ecosystem's COVID-19 progression, economic impact, consumer response and plan your company's strategies and actions.

[\*\*Reboot: Return to the workplace:\*\*](#) Stabilization following initial COVID-19 impact and the resulting economic crisis means something distinct to each sector and every company.

# Contact us

## For more on the research:

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Director, Health Research Institute

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## For more on the business issues raised in this report:

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# Thank you

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