



REPORT

NRC Health 2021 Mid-Year Healthcare Consumer Trends Report

A note from NRC Health Chief Growth Officer Helen Hrdy

DISTINGUISHED PARTNERS OF NRC HEALTH,

It is fair to say that the aftermath of COVID-19 continues to impact healthcare, and its social, economic, and political effects continue to unfold. While the future of healthcare feels tenuous at times, we are starting to see positive momentum in consumer behavior and in the ways in which they interact with traditional healthcare organizations.

This return to healthcare allows us to make novel connections and gain fresh insights to enable healthcare organizations to understand the story behind each person served. When we can fully realize our mission of Human Understanding,[™] we can recognize what matters most to every consumer.

The ***NRC Health 2021 Mid-Year Healthcare Consumer Trends Report*** tracks valuable indicators of how consumer dynamics have changed this year. The report, gleaned from millions of data points across more than 200,000 American households, captures an evolving snapshot of consumer sentiment, from the beginning of the pandemic to today.

It is encouraging to see that consumers are now engaging more with health organizations, closing the gap on delayed care, turning to telehealth options, and getting vaccinations. To that end, this report will outline how consumer sentiment continues to evolve along with several vital trendlines:

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- Part 2: Telehealth engagement [page 7](#)
- Part 3: Vaccination opportunities [page 9](#)

These optimistic insights, grounded in the single most extensive database of American healthcare consumers, should help industry leaders lay the foundation for a forward-facing strategy prepared for the aftermath of COVID-19 and beyond.

Together, we can continue to be guided by the right insight at the right time to exceed the expectations of today's consumers.

Sincerely,



Helen Hrdy,
Chief Growth Officer, NRC Health

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PART ONE: CARE DEFERMENT

Consumers are slowly resuming services for care that were previously delayed, and price transparency is a top factor in getting them to return.



"It has always been great. I had delayed coming for a bit due to COVID-19 and not wanting to go near a hospital. But the imaging center was great!! I was in and out—safely."

—Massachusetts customer

Perhaps the most alarming trend of 2020 was the widespread deferment of care. Healthcare leaders have been **dealing with fallout from mixed messages over the last year, among them the initial "stay at home" admonishments and now, in 2021, the message that "it's safe to come back."** While healthcare systems did a phenomenal job standing up hospital observation units for COVID-19 and pivoting to "hospital at home" scenarios, the message is now, "Come on back—but follow our capacity rules to stay safe."

While volumes haven't bounced back to normal levels yet, and some areas have seen a decrease in trauma units, it's no secret that **at least 51% of consumers who delayed care** in the first half of 2021 said they did so because of COVID-19.

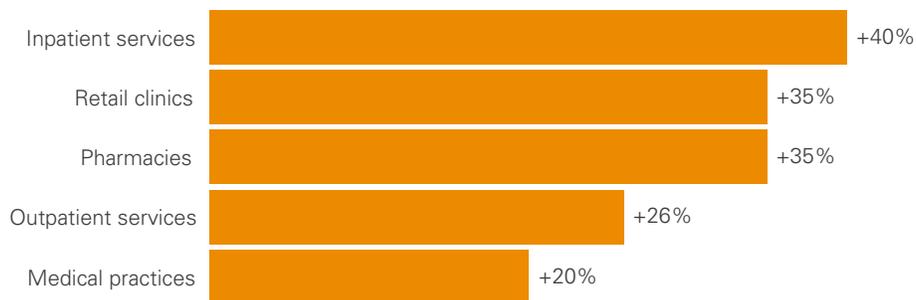


51%

of consumers who **delayed care** in the first half of 2021 said they did so **because of COVID-19**.

The good news is that the rate at which consumers are resuming services has **risen by 5%** from Q3 2020 to the first half of 2021. Not only is delayed healthcare decreasing, but NRC Health's Market Insights and NRC Health's Patient Experience data points also show that many service lines and specialties are returning to normal levels, and that telemedicine and urgent-care visits are remaining the same.

Rise of in-person services for the first half of 2021:



What's interesting to note is that months before the pandemic, deferment rates were approaching a five-year low. Looking at a recent NRC Health Market Insights survey,¹ data suggests **deferment rates could be affected by consumers' frustration with price transparency**. Of all the industries in which consumers want to know prices up front, healthcare tops the list.

CONSUMERS' INTEREST IN PRICE TRANSPARENCY

Nearly 90 percent of consumers surveyed agreed that they would use a website that included hospital and doctor charges for standard procedures.

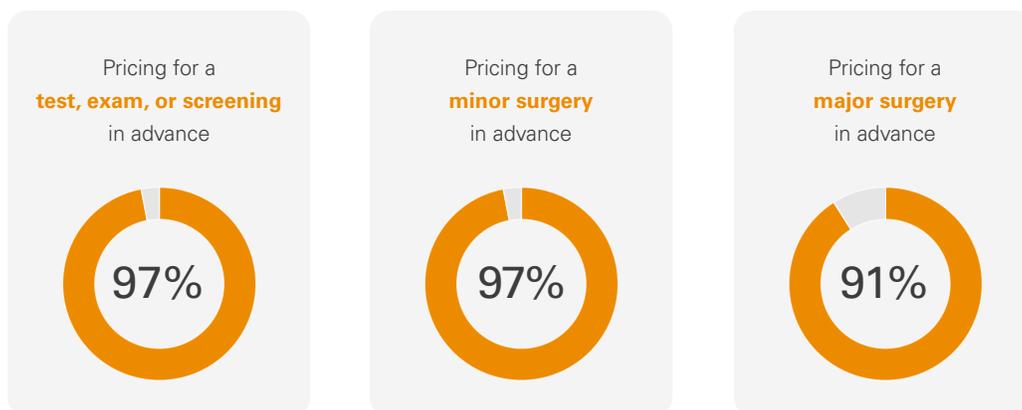


3 out of 4

consumers would choose a provider who shares prices over one who doesn't.

Everyone is at a different part of their healthcare journey, so their own story will help influence the more significant issue of price transparency. During the pandemic, consumers turned to technology to order and receive what they needed. As people resume regular activities post-pandemic, **it's natural that they will turn fresh eyes on healthcare**, and call for the industry to treat them like other industries do.

Healthcare consumers want to know:



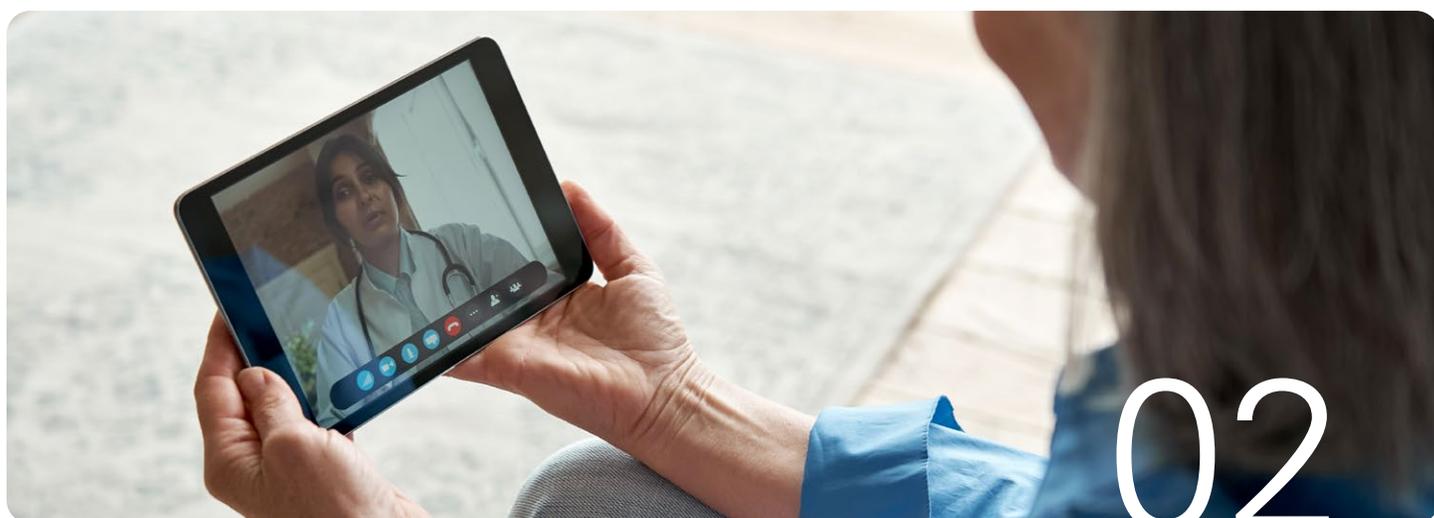
Consumers are concerned with the perception of value to dollars spent, and with healthcare, the stakes are even higher. The takeaway message for health organizations is clear: consumers are ready to come back and engage with your healthcare organization, but **they will be expecting you serve them even better than before.**

Healthcare consumers want the ability to:

- ✓ See total cost, out-of-pocket cost, and cost covered by insurance
- ✓ Compare out-of-pocket costs for different care options (e.g., urgent care vs. ER care)
- ✓ Calculate out-of-pocket costs based on their insurance type
- ✓ Review providers' quality measures
- ✓ Contrast out-of-pocket costs for in-network and out-of-network providers

PART TWO: TELEHEALTH ENGAGEMENT

Many consumers used telehealth during the pandemic, and are excited to continue using it when it makes sense.



"I love the virtual visits; it saves so much time! I hope they continue even after the pandemic is over."

—Minnesota customer

While the technology was available and consumers were willing, the pandemic pushed a whole new level of acceptance and engagement for telehealth medicine. Previously, healthcare systems had struggled with how telehealth reimbursement would work. Payers and providers had not yet reached a consensus for compensating telehealth appointments, which complicated the business case for widespread adoption.² However, as hospitals contended with potentially contagious work environments and social-distancing protocols, the **digital option went from luxury to necessity**.

Overall, telehealth usage has grown significantly since 2018 (7.8%) → 2020 (22.1%) → the first half of 2021 (45.1%).

Telehealth usage has more than doubled since 2020.

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22.1% (2020)



45.1% (2021)

Consumers are not only impressed with their telehealth experiences—many **specialties will continue to see their areas grow** as patients enjoy the ease of use, amount of time spent with providers, courtesy and respect received, and attentiveness of providers.

Telehealth remains popular for many specialties

+27%

Increased usage with
**Internal Medicine
Physicians**

+14%

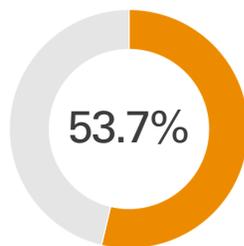
Increased usage with
**Family Practice
Physicians**

+14%

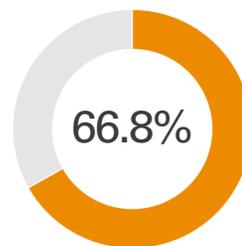
Increased usage with
**Nurse
Practitioners**

Many patients are hoping that healthcare systems will continue to provide virtual visits even after the COVID-19 pandemic is over. So, given that the platform has doubled in less than a year, healthcare systems should **cultivate an effective and meaningful telehealth practice**. Healthcare systems should also **prioritize provider time and attentiveness**, as well as **financial transparency**.

Enthusiasm to use Telehealth is increasing



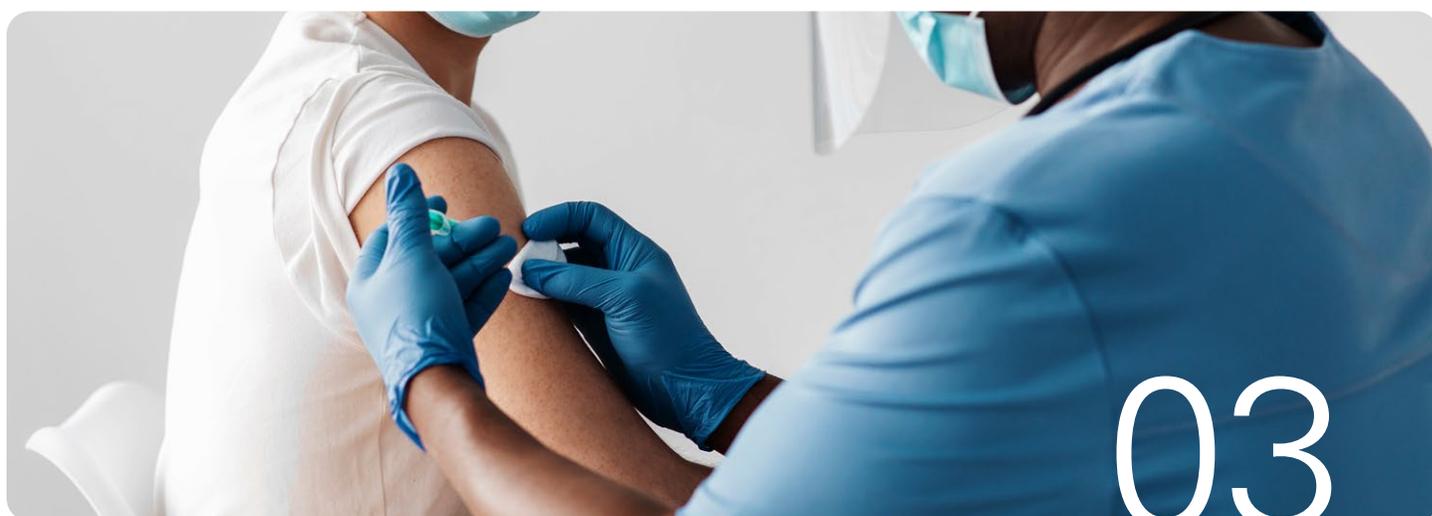
2020



2021

PART THREE: VACCINATION OPPORTUNITIES

Vaccination rates continue to rise,
and clinics can use this opportunity
to impress patients.



“From the minute I drove into the facility to the minute I pulled out, I felt taken care of. Everyone was kind and courteous. I was nervous, and my nurse was lovely and worked to ease my concerns. The process was well-organized and felt very seamless. Everyone I interfaced with was genuinely kind; I appreciate that. I had side effects after the first dose and am leery of coming back for the second, but I will do so knowing that kind people will greet me.”

—Massachusetts customer

Vaccinations are a fundamental reason for consumers to reach out and interact with healthcare systems. As of April 2021, NRC Health’s Market Insights COVID Study reveals that 3.2.1 **48.7% of respondents say they have gotten the COVID-19 vaccine** (an increase of 6.9% from April) and **28.1% still plan to get vaccinated**. And uncertainty about the vaccine is declining. As of May 2021, 10.7% say they will never get the COVID-19 vaccine, decreasing **0.2%** from April. More broadly, the Pew Research Center agrees that public intent to get vaccinated is on the rise, reporting that 77% of respondents think vaccinations will benefit the U.S. economy.³

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28.1%

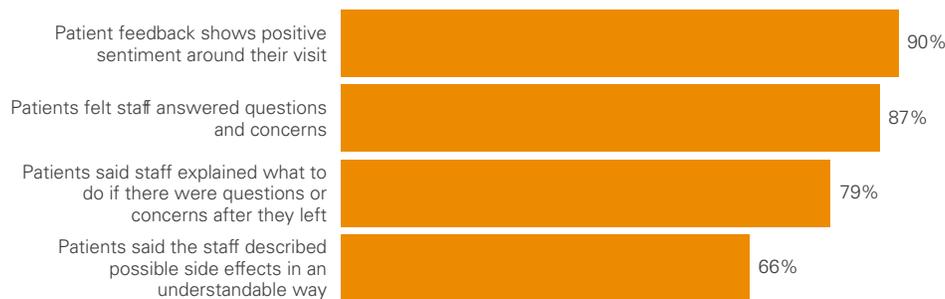


of respondents say they
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Consumer concerns are largely down across the board. The increasing number of vaccinated people and people who see that many of their problems are no longer of as much concern has driven down the percentage of concerned consumers overall. The **main concern nationwide was around side effects (36%)**, and the number of people who reported feeling that concern has decreased by 1.9% from April to May 2021.

Overall, patients reported positive sentiment toward vaccination wait times and toward care teams' courtesy/respect, professional skill, and responsiveness to those receiving vaccines. However, some patients still reported negative sentiments around wait times, scheduling, and the quality/appearance of the building they'd visited—making it clear that **healthcare systems have a considerable opportunity to reintroduce themselves** and connect with each person they serve.

Consumer sentiments show positive patient encounters



While consumers cared about their vaccine experience being fast and friendly, they also positively remarked on staff answering questions and helping them when they were worried about the vaccine. This **demonstration of Human Understanding can transform your culture**, creating a deeper connection with consumers and better outcomes. Consider these factors as you consult with your staff to provide the best experience possible.

Future drivers for consumers willing to recommend their vaccination clinic:

- Staff answering questions and concerns
- Staff explaining what to do if there were questions or concerns after they left
- Staff describing possible side effects in an understandable way

CONCLUSION:

Success depends on how healthcare systems apply Human Understanding to their challenges.



**Consumers are ready to return to normal.
Will you be ready?**

Healthcare leaders who want to future-proof their organization are wise to rise to the challenge of shifting consumer needs and to exceed expectations by listening to their patients. To do this, they need to understand that behind each patient is a person with a story—and that story matters.

Our mid-year trends report offers exciting new insights that allow healthcare systems to make novel connections and understand better the story behind each person served.

Be ready to make each experience at your organization better than the last—and close the gap on delayed care, ensure your telehealth options serve consumers well, and help your populations get vaccinated.

SOURCES

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3. Funk C., and Tyson A. "Growing Share of Americans Say They Plan to Get a COVID-19 Vaccine—Or Already Have." March 5, 2021. Accessed at: <https://www.pewresearch.org/science/2021/03/05/growing-share-of-americans-say-they-plan-to-get-a-covid-19-vaccine-or-already-have/>

**NRC Health helps healthcare organizations
better understand the people they care for and
design experiences that inspire loyalty.**

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