



REPORT

NRC Health 2022 Healthcare Consumer Trends Report

A note from NRC Health Chief Growth Officer Helen Hrdy

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COVID-19's aftermath continues to influence consumers' trust and engagement with healthcare. The future of healthcare, while uncertain, will focus heavily on personalizing consumers' experiences—and those organizations that lead with empathy and Human Understanding to engage patients will be more than ready to meet any unforeseen challenges.

The NRC Health 2022 Healthcare Consumer Trends Report provides insight into how healthcare organizations can navigate the next year successfully. The report, compiled from millions of data points across more than 300,000 American households, captures an evolving snapshot of consumer sentiment.

Encouraging news awaits organizations that have embraced the fact that the only constant in life is change. With a change mindset, healthcare leaders can find creative solutions to engage more with consumers and patients and drive healthcare recall and brand awareness. To that end, this report will outline how consumer sentiment continues to evolve along several important trendlines:

Part 1: Care deferment	Page 4
Part 2: Wellness and mental-health engagement.....	Page 7
Part 3: Telemedicine opportunities	Page 9
Part 4: Healthcare recall.....	Page 11
Part 5: Human Understanding	Page 13

These insights, grounded in the single most extensive database of American healthcare consumers, should help industry leaders lay the foundation to futureproof their organizations in the aftermath of COVID-19 and beyond.

We hope you find it informative and worthwhile.

Sincerely,



Helen Hrdy,
Chief Growth Officer, NRC Health

Contents

PART ONE:

Care deferment	4
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PART TWO:

Wellness and mental-health engagement	7
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PART THREE:

Telemedicine opportunities	9
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PART FOUR:

Healthcare recall	11
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PART FIVE:

Human Understanding	13
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PART ONE:

Healthcare deferment has decreased and consumers are returning in record numbers, but preventative care has been particularly affected.



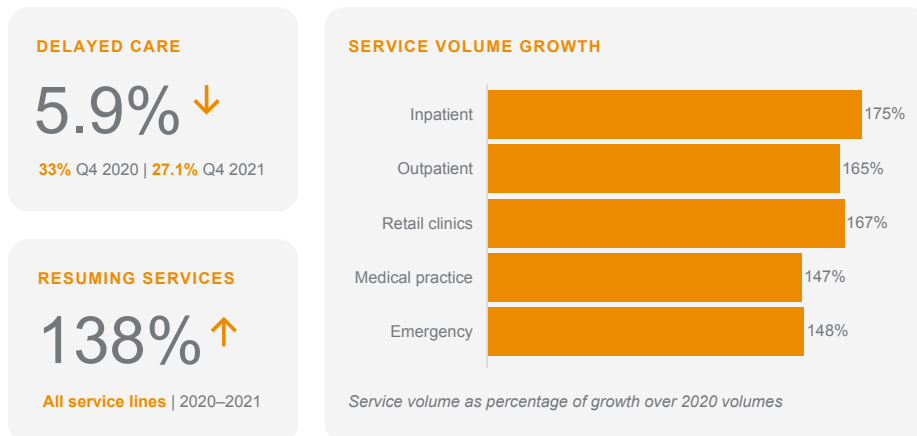
"Good to be back in the office for visits. Very informative visit. It was so nice and comfortable to be with the doctor and nurses after such a long time with no physical contact."

— Texas customer

One of the most significant disruptions in healthcare delivery in modern history has been caused by consumers deferring care during the pandemic. The excellent news is, NRC Health data shows that healthcare deferment is now decreasing, and consumers are starting to resume services. However, healthcare systems should be mindful that some of the consumers who return could be sicker and costlier in 2022 than they would have been before.

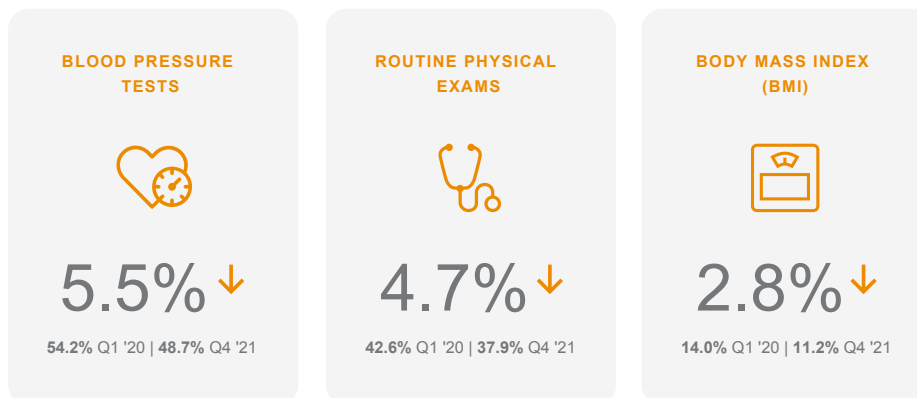
As of Q4 2021, **27.1% of consumer respondents state that they have delayed care**, compared to the peak of **33%** in Q4 2020. The rate at which **consumers are resuming services has risen by 149% from 2020 to 2021 across all major service lines**. The most

considerable increase in volume is evidenced in the inpatient care setting (**175%**), followed by outpatient services (**165%**) and retail clinics (**167%**). There have also been significant increases in volume in the medical practice (**147%**) and emergency department (**148%**) areas.



While the COVID-19 pandemic caused many consumers to delay several types of care, preventative care was particularly affected, especially in conditions where the COVID-19 virus can be most acute.

- Blood pressure tests **declined 5.5%**, from **54.2%** in Q1 2020 to **48.7%** in Q4 2021
- Routine physical exams **declined 4.7%**, from **42.6%** in Q1 2020 to **37.9%** in Q4 2021
- BMI (Body Mass Index) screenings **declined 2.8%**, from **14.0%** in Q1 2020 to **11.2%** in Q4 2021



And the percentage of consumers having no preventative service or test **increased 1.8%**, from 18.2% in Q1 2020 to 20% in Q4 2021.

Healthcare systems should also consider that **13% of respondents say they're unsure when to resume healthcare activities**, and **4.6% say they won't return to healthcare**. Left untreated, many patients' conditions are likely to deteriorate, leading to serious adverse outcomes that health systems may not be able to treat.



Findings like these—and others that show that patients **delaying myocardial infarction or appendicitis care prioritized avoidance of COVID-19 exposure** over seeking appropriate care—suggest that healthcare systems and public-health organizations should develop effective communications for patients and the community at large to **reassure them and encourage timely healthcare** for critical needs during the ongoing COVID-19 pandemic and other similar scenarios.¹

“Healthcare systems and public-health organizations should develop effective communications for patients and the community at large to **reassure them and encourage timely healthcare.**”

Recognizing this, some healthcare systems have reached out directly to chronically ill patients and those at risk for chronic disease, with campaigns to get them to return to care. Other efforts have included hosting virtual town halls, advertising on social media, holding Facebook Live events, and reaching out to business leaders.² But whatever the method used, it's time to close the gap on educating the public around the importance of timely healthcare.

“This was the first time back in the practice since COVID. I actually called to book my physical, because I forgot. When I called the office, they said I had an appointment already. I really appreciated them paying attention to my needs, as physicals can be hard to get.”

—Massachusetts customer

PART TWO:

The pandemic has taken a significant toll on mental health, increasing mental-health hospitalizations—and healthcare systems need to act now to find the necessary resources.

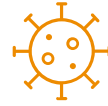


“My health concerns are of great concern to me and have so many along with my mental health I feel like I am getting worse this last year not better at all.”

—California customer

Although telehealth usage has increased in counseling (**206%**), it is devastating to acknowledge that nearly **one third (30%) of consumers report that their mental health has worsened due to the COVID-19 pandemic**. Additionally, mental-health hospitalizations have increased by **190%** from 2020 to 2021.

Depression remained common during the pandemic and worsened for some people. A broader national study from the Centers for Disease Control and Prevention showed that the percentage of adults with **recent symptoms of a depressive disorder had increased**, from **24.5%** in August 2020 to **30.2%** in December.



1 in 3

consumers (30%) report that their **mental health has worsened** due to the COVID-19 pandemic.

TELEHEALTH USAGE IN COUNSELING

206% ↑

MENTAL-HEALTH HOSPITALIZATIONS

190% ↑

MAJOR DEPRESSION SYMPTOMS IN ADULTS

5.7% ↑

Healthcare systems should note that it's crucial to identify people with depression, because it's a decisive risk factor for cardiovascular disease. And if people are becoming more depressed because of the pandemic, healthcare systems could see a higher incidence of cardiovascular disease in a few years. **Women, particularly those of childbearing and child-rearing age, may have experienced a specific burden** during the pandemic, given that they often had to take on increased caregiving duties.³

Before 2020, mental disorders were the leading cause of the global health-related burden, with depressive and anxiety disorders contributing to this burden. The emergence of the COVID-19 pandemic has created an environment where many **determinants of poor mental health are exacerbated**. There is an imperative need for up-to-date information on the mental-health impacts of COVID-19 that can inform health-system responses.⁴

The increased frequency of symptoms of anxiety and depression in an ongoing CDC study indicates that **mental-health services and resources, including telehealth behavioral services, are critical, particularly among populations disproportionately affected by COVID-19**. National COVID-19 trends demonstrate that specific populations have been **disproportionately affected by high COVID-19 incidence**, which suggests that these populations might also be more vulnerable to the psychological consequences of COVID-19.⁵

The pandemic has created an increased urgency to strengthen mental-health systems in most countries. Mitigation strategies could incorporate ways to promote mental well-being and target the determinants of poor mental health, along with interventions to treat those with mental disorders. **Taking no action to address the burden of major depressive and anxiety disorders should not be an option.**⁶

PART THREE:

There is consistent and robust excitement around telehealth, but healthcare systems should strategically determine which services and patients work best within a telehealth setting.



“I am excited to be able to be treated by the doctor virtually. I hope that even post pandemic, this type of service will still be available.”

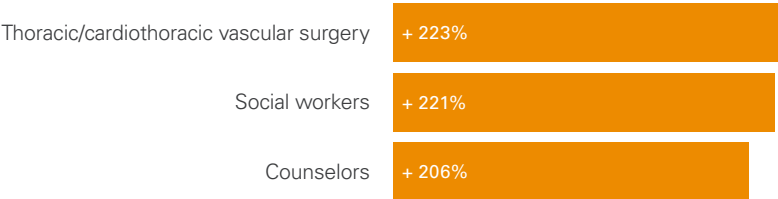
—Massachusetts customer

While telemedicine struggled with how reimbursement and logistics would work in years past, the widespread adoption of this technology has grabbed and is now holding consumer interest. Consumers’ excitement for telehealth has hovered around **55%** throughout the pandemic, compared to the pre-pandemic average of 49.3% in Q1 2020. Consumers 35 to 44 years old are the most excited about telehealth (**68.1%**), whereas people 65 and older are the least excited (**45.2%**).

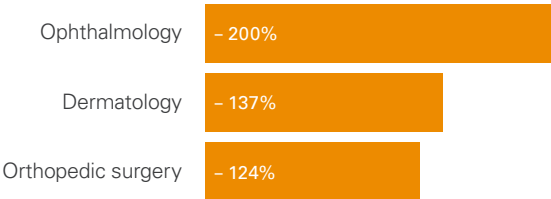


Consumers have determined that telehealth’s inherent ease of use, amount of time spent with providers, courtesy, respect received, and attentiveness has made the technology a winner, and not just with family practice, internal medicine, and nurse practitioners.

Telehealth usage has increased in several provider specialties as well:



And while telehealth makes sense for many areas, it’s not a slam dunk for every healthcare specialty. NRC Health data shows that telehealth usage has decreased in several areas, including:



Physicians and healthcare organizations are innovating in other areas of digital health, thinking beyond videoconferencing to sensors, augmented intelligence, wearables, and more to reduce costs and improve health outcomes, care experience, and work-life balance.⁷

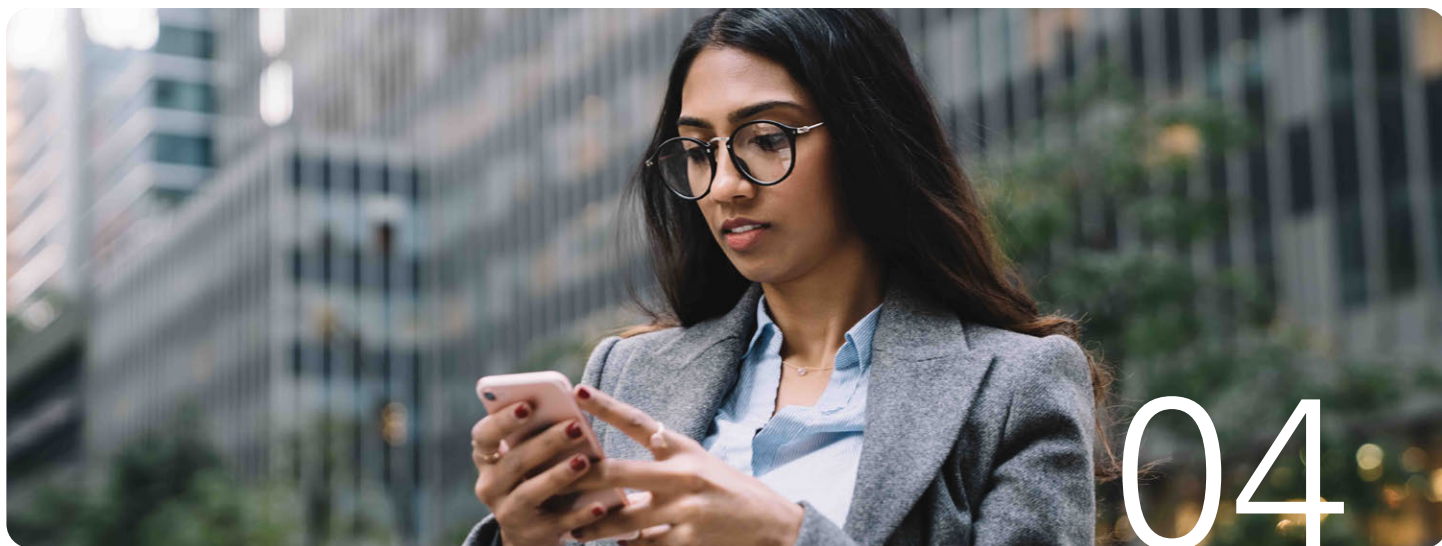
Given that telehealth usage has more than doubled since 2020, healthcare systems should **cultivate an effective and meaningful telehealth practice** and consider **digital health innovations**. Healthcare systems should also **prioritize provider time and attentiveness**, as well as financial transparency, in their telehealth offerings.

“Loved virtual because I did not have to take time off work for driving and a waiting room. Very efficient and convenient.”

— Indiana customer

PART FOUR:

Hospitals and health systems should capitalize on consumers' increase in healthcare recall and advertise personalized care to promote services and provide resources.



"The whole team was super. The care was excellent for my first visit, I'm glad I made the choice to switch. It's all what's advertised and more."

— Tennessee customer

A healthcare system's obsession with brand loyalty is easy to understand. In driving down costs and capturing recurring revenues, consumer loyalty is a significant driver of health-system profitability. Frequent patient visits drive up the quality of care by improving care continuity and reducing the potential backlash associated with not keeping routine healthcare a priority.

The good news for healthcare systems is, **consumer healthcare recall is starting to climb**, and healthcare systems can capitalize on this growing trend. NRC Health data from Market Insights recalling key performance indicators year-over-year find that marketing recall has increased by **5.1%**, from the lowest point of **59.4%** in 2020 to **64.5%** in 2021.



5.1%

increase in marketing recall, 2020–2021

Additionally, consumers report an increase in **helpful health information** from hospital websites (**+5.8%**) from 2020 to 2021. Consumers who have visited a hospital website are also up **4.6%** since November 2020, with **an all-time high of 31% visiting a hospital website** as of November 2021.

HELPFUL INFO FROM HOSPITAL WEBSITES

5.8% ↑

2020–2021



HOSPITAL WEBSITE VISITS

4.6% ↑

Since November 2020



This trend fuels digital healthcare efforts, offering healthcare systems an abundance of data that can be used to **personalize communications and deliver connected tools and data for consumers** to give them the information they want, when they want it. Digital healthcare can also automate everything from data entry to medicine distribution and research analysis, providing staff with resources and time to give the best-personalized care possible to each consumer. Ultimately, the ability to be proactive in communications allows for better disease prevention, circumventing the need to treat many conditions.⁸

“Consumer behavior communication tells us that **more than half (51.2%) of consumers say they will use a handheld mobile device to access information** in the next year.”

Consumer behavior communication tells us that **more than half (51.2%) of consumers say they will use a handheld mobile device to access information** in the next year. Social media is one of the most significant drivers of handheld mobile information, and its use is up (**10.8%**) from **7.4%** in 2020 and is now the third most recalled ad platform behind television (**38.7%**) and billboards (**11.8%**).

Healthcare organizations should build their brands using personalization techniques and an omnichannel approach to target and engage active patients.

PART FIVE:

Hospitals and health systems must demonstrate an understanding of patients' unique needs and preferences to show Human Understanding in action, which builds trust.



"The doctor took the time to address all my priority questions, explore strategies to address particular concerns and most importantly, approached me as a unique person."

—Colorado customer

Personalized experiences are slowly becoming the norm as consumers engage and share information with hospitals and practitioners, who then use this information to personalize experiences further. With personalization at the center of emerging healthcare, consumers will seek new levels of health and wellness—but only if healthcare organizations get it right.

Consumers' likelihood to recommend hospitals and health systems has **increased by 3.9 points from 20.2 in 2020 to 23.3 as of November 2021**; while patient experience peaked during the onset of the pandemic—with Net Promoter Scores at **56 in April 2020** for hospital inpatients and emergency departments—but have been declining since, resulting in an NPS of **44 in December 2021**. While consumers' likelihood of recommending hospitals and health systems increases, patients' likelihood of recommending hospitals decreases, indicating that the

patient experience is not meeting expectations. The bottom line? Hospitals and health systems must meet people where they are.



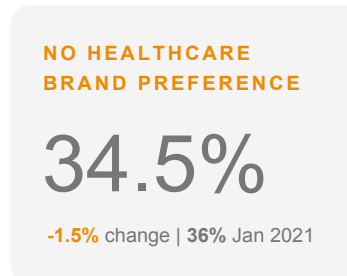
The key to enhancing a patient’s care journey is **understanding preferences in advance**, which can be achieved with communication assessments. Healthcare systems should deliver a person-centered, equity-focused experience as a standard measure across care settings, and treat each patient as a unique individual while personalizing their experience.

During the past 15 years covering the existence of the CAHPS program, NRC Health has seen the overall percentage of patients recommending an organization barely increasing—yet the industry is spending billions of dollars a year to drive improvement against such measures.

What needs to shift is an understanding that 99% of a patient’s life happens beyond the hospital care setting. When healthcare organizations begin to understand each person’s expectations in advance of their interaction or episode of care, they can personalize those interactions at the right moments and exceed those expectations.

In light of the [2021 Consumer Trends Report](#), NRC Health reported that an increasing number of consumers had indicated no particular preference for a healthcare brand. In 2021, the percentage of consumers indicating “no preference” was **34.5%, indicating a plateau in “no preference.”** But while the number of consumers with no preference has plateaued, hospitals and health systems have a vested interest in ensuring that their brand is preferred.

In 2021, the percentage of consumers indicating **“no preference” for a health brand plateaued.**



Consequently, healthcare organizations must strive for seamless connectivity between service recovery and missed patient expectations, driving caregiver recognition and positive comments on social media to enhance reputation. Now is the time for healthcare organizations to use meaningful advertising and aim their messaging at patients in a personalized way that adds value to their life.

CONCLUSION:



The global pandemic surrounding COVID-19 and its variants has caused healthcare organizations to quickly learn that transformational change is necessary to meet demand and move the industry forward. And while many hospitals and health systems have shown they can be flexible despite catastrophic loss, the pandemic has shone a light on how necessary consumer-driven improvements and a better patient experience are to continued survival and growth.

The healthcare industry can draw on NRC Health's six Human Understanding imperatives to strengthen their commitment to consumers:

- 01 Drive growth** by using patient ratings to amplify why you are the best choice for care
- 02 Personalize care** by understanding what matters most to each patient
- 03 Build trust** by checking in to identify and address questions, readiness, and safety risk
- 04 Exceed expectations** by collecting and reporting feedback to spark action
- 05 Drive loyalty and equity** by treating every patient as a unique person
- 06 Transform services** by surfacing needs voiced by the communities you serve

When organizations lead with empathy and Human Understanding and can engage patients to co-design the care experience, they will be more than ready to meet any future challenges.

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

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