

# 2022 Health Care Insights Study



 **CVS**  
Health<sup>®</sup>

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# Introduction

**Results of the 2022 Health Care Insights Study reveal that people care about their health as much — or more — than they did compared to pre-pandemic. People are no longer putting off their checkups or screenings due to pandemic concerns and are eager to continue their health and wellness journeys.**

This year's findings show that people have embraced a holistic outlook on health.

People are increasingly searching for a new kind of health care experience that's simpler and more efficient.

Patients value deeper and more meaningful relationships with their primary care physicians (PCPs) and other providers, and are finding that new virtual care options are filling in gaps and making it easier to achieve successful relationships with their PCPs. People want their PCPs to know and understand their lifestyle choices, personal health

goals, family medical histories and more, and are open to their health information being shared virtually across care settings to ensure seamless continuity of care. Coordination and communication are the two watchwords for a new generation of health care.

According to our study, patients generally have a high degree of trust in their providers, including primary care physicians, nurses, pharmacists and others. They are also seeking support and guidance on medication adherence, mental health needs, and other areas. Quick and easy connections with providers via phone calls, texts and other virtual means are highly valued by patients.

At CVS Health, we understand how the current health care system — with its complexities, poor outcomes, high costs, and unsatisfactory patient and provider experiences — creates real barriers to care. We also know that people are seeking help to achieve their health goals and need high-quality primary care to make that happen. That's why we are building on our care delivery and omnichannel offerings and relying on our clinical expertise, unparalleled data analytics, and community reach to fix what's broken.

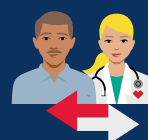
**People are no longer putting off their checkups or screenings due to pandemic concerns and are eager to continue their health and wellness journeys.**



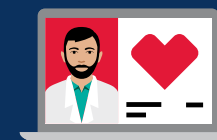
People have embraced a holistic outlook on health.



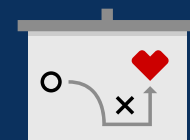
People are increasingly seeking health care that's simpler and more efficient.



Patients value more meaningful relationships with their primary care physicians.



Patients appreciate quick and easy connections with providers via phone calls, texts and other virtual means.



The current health care system creates real barriers to care.

# Providers, consumers seek higher levels of engagement, communication

More than ever, according to our study, consumers want to build lasting relationships with their physicians and other providers and have meaningful conversations about their health conditions. As people embrace lifestyle changes post-pandemic as essential elements of overall health, they want providers to know about those changes and to advise them on further actions they can take to improve health.

Physicians similarly report that good communication is critical in how they interact with patients and other providers.

There is low consumer tolerance for siloed, disjointed interactions that address consumers' health and medical concerns and challenges in a superficial, non-engaging or hasty way. However, there is high demand for physicians, providers and caregivers to ask meaningful questions that address root causes of health conditions and improve consumers' health and well-being long-term.

**Consumers have a holistic perspective on what health care should look like.**

**81%**

say it's important their primary care provider be aware of their overall happiness and satisfaction with life

also say they want their primary care provider to be aware of their stress levels and how they're dealing with difficult situations

People are not only more open to a provider accessing their health information, but expect their medical records, history and data to be available to provide a holistic picture of where they are in their health care journey.

Communication between patients, providers and specialists is key — especially for people managing specialty medications and complex conditions.

**Communication between patients, providers and specialists is key.**

**60%** of consumers taking a specialty medication for complex conditions indicated communication between their primary care physician and specialist was very important.

**32%** said it was somewhat important.

What makes for better provider-patient communication? More time and attention. This was particularly important for those with more serious health concerns:

**Providers feel very pressed for time. Our research found that:**

**88% of providers**

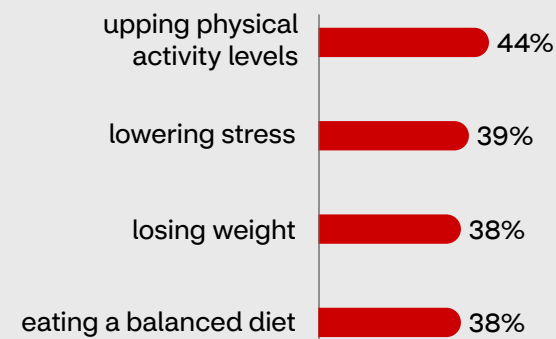
wish they had more time to spend with and care for patients with complex conditions.



**61% of respondents**

noted that access to specialized care support for patients with certain complex conditions had a high-to-moderate impact on their ability to achieve desired outcomes.

**New health habits over the past year have focused mostly on:**



**80%**

say it's important their primary care providers be aware of their health goals.



**22%**

say COVID-19 led them to care about their health more than ever before.



**44%**

have embraced new health habits or goals specifically because of COVID-19.



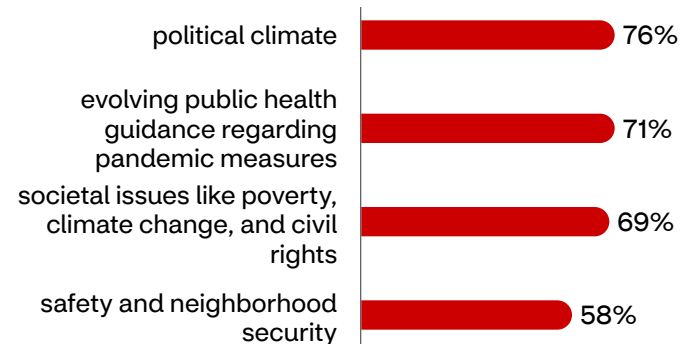
**12%**

have considered adopting new health goals because of COVID-19.

**Adopting a healthy lifestyle is now top-of-mind for many:**

**The COVID-19 pandemic's societal, economic, environmental, and political ripple effects deeply impacted — and continue to impact — consumers' mental health.**

**In the last 12 months, consumers indicated they have experienced stress from the following:**



Physicians and providers continue to offer a beacon of hope and support for many patients, with 94% of people saying their level of trust in their provider is the same or even more than it was before the pandemic.

**Not all consumers feel comfortable seeking mental health help or believe these services would work for them.**



**11%** would be embarrassed or ashamed to seek mental health help for themselves.

**10%** say mental health services don't benefit them and they would never use them.

**Providers are generally supportive of connecting patients to mental health professionals.**



**57%** say access to mental health professionals would be very helpful to their patient population.

**48%** say they always or often refer their patients to a mental health professional to help their patient achieve a health goal.



**Many people understand that mental health, like physical health, must be addressed.**

Nearly half of physicians believe that telling patients about available mental health services helps their patients to meet health goals.

**40%** feel mental health services are very helpful and would use them if needed.

**26%** feel mental health services are very helpful and have used them.

**23%** of people who self-identified as Black view mental health services as very helpful and have used them.

**20%** of people who self-identified as Hispanic also agree.

**MinuteClinic® mental health counseling**



Our MinuteClinic® licensed therapists offer CVS Health members accessible mental health services in a supportive and non-judgmental environment. Following an initial assessment, a licensed therapist will create an individualized care plan to help members with the parts of life that can be difficult to manage like life transitions, depression and anxiety. With both in-person care and telehealth services available, our licensed therapists will work with members to lower their distress and build greater well-being for the long-term. Wherever our members happen to be and whenever they need someone to talk to, we're ready to listen.

# Next generation primary care

**The future of care delivery demands a new collaborative team approach. CVS Health’s strategy to provide a new primary care model focused on a physician-led team is designed to simplify and improve the patient journey.**

**Physicians say that coordination is the springboard for next-generation care.**



New care models that offer in-person, virtual and home-based care options — supported by seamless data sharing and coordinated by physician-led teams — are the future. Patients also recognize that this type of care coordination is vital to better experiences and outcomes. Indeed, 83% of consumers reported that coordination among all health care providers is very or somewhat important to their health.

**Physicians also see the value of a team-based approach:**

**68%** say coordinating with their patients’ other care providers had a high to moderate impact on their ability to achieve desired outcomes for patients.

**64%** said offering patients access to other health care professionals to help coordinate care had a high to moderate impact.

## A new kind of primary care

Many people know us from our CVS Pharmacy locations, but may not realize that our team of pharmacists, nurse practitioners, physician assistants, and behavioral health professionals also provides a broad slate of high-quality health services — from women’s health services at select MinuteClinic locations to counseling for depression and anxiety — and many others in between. The next step in our evolution is a physician-led, comprehensive primary care model that brings together this multidisciplinary team to offer patients coordinated care.

**Coordinated care occurs when a patient’s care is deliberately organized and information is given to all health care and support teams.**

The care team then guides safe, appropriate and effective care. In a highly fragmented health care system, people recognize the value of synchronized care. For instance:

**85%** of consumers say it is important their primary care provider be aware of their prescription drugs prescribed by other health care providers.

**83%** of consumers say it is important their primary care provider be aware of other physicians they are seeing and their diagnoses and recommendations.

**Most people want their medical information to be digitized, and for this information to be available to their providers.**

**85%** of consumers say provider access to their digital health history/record is very or somewhat important factor when choosing a primary care provider.

There has been a significant shift in consumer privacy concerns that were evident in past editions of the Health Care Insights Study. This year, 61% of consumers said it was very important to keep private health information confidential, exhibiting a yearly decrease from the first study five years ago when 80% of consumers surveyed felt this way.

Similarly, only 59% of consumers said data security was very important to them this year, a number which also consistently declined from 76% in 2017. The speedy adoption of virtual care, spurred by necessity during the COVID-19 pandemic, may be partially responsible for this change in consumer perspective.

## Tackling health care disparities.

Recognizing that 80% of a person’s health is determined outside the doctor’s office, CVS Health is committed to tackling the health disparities and racial inequities that lead to poor outcomes and health care experiences. Our Health Zones initiative helps advance equity with numerous community investments to increase access to health care, housing, education, food, labor and workforce training, and transportation.

## People want health care that is open-ended, flexible and unique.

The need for coordinated care is driving a desire for more expansive, all-encompassing health tools, too.

People are also increasingly interested in getting a care experience that takes into account their entire medical picture.



**62% of consumers**

say they are either very or somewhat likely to use a virtual visit if they don't need a physical examination.



**83% of people**

want their primary care provider to know about their family medical history, genetics and inherited lifestyle habits.



**87% of providers**

strongly/somewhat agree that automated reminders like texts, calls, and phone notifications are valuable for treating patients with complex conditions and/or specialty medication needs.



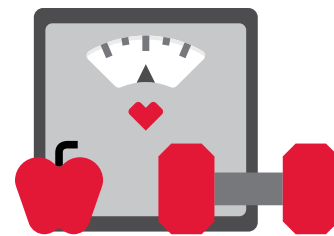
**89% of consumers**

who take specialty medications or have a complex condition said medication refill reminders by phone or text were very or somewhat important.

## Virtual care innovations

CVS Health Virtual Primary Care™ is a new health care solution giving members access to a continuous relationship with a physician-led virtual team who are there for patients from the first visit to every visit thereafter, and the moments in between. Members have virtual access to on-demand care, chronic condition management and mental health services, with the option of being seen in-person when needed. This flexible, innovative solution makes it easier than ever for people to access care and get their health information all in one place so they can stay healthy even when balancing the demands of work and life.

**Consumers are open to non-traditional health care options, with over half — 54% — saying holistic care options involving diet, exercise and counseling are either very or somewhat important to them.**



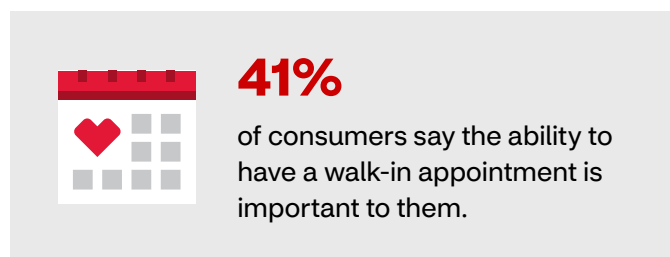
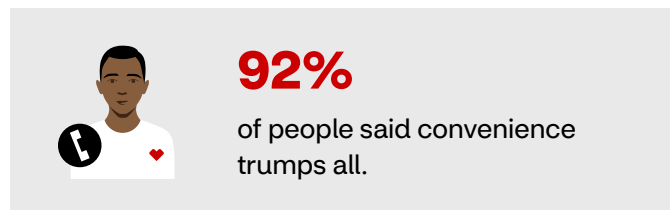
# Convenience, accessibility and cost continue to be important

The pandemic's telehealth boom means virtual visits have become a standard offering as consumers continue to prioritize practical factors when selecting health care. Most people view virtual care as a convenient extension of health care options versus a replacement for in-person visits.

## People see convenience as the main benefit of virtual visits.

People want simplicity when it comes to health care, preferring their living room to a waiting room and options that don't involve extended wait times, transportation costs and unnecessary travel.

## When asked which factors were very or somewhat important in choosing a primary care physician or main health care provider:



## Health care that happens anytime, anywhere

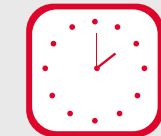
CVS Health offers mobile and digital solutions, enabling customers to access health care services in a way they find most convenient and that allows them to save both time and money. Whether finding a health care provider, managing prescriptions, arranging deliveries, scheduling visits or comparing costs, customers can now be connected to the full breadth of CVS Health products and services anytime, anywhere. Currently, nearly 44 million unique customers are using CVS Health digital channels to manage their health and wellness needs, resulting in higher customer satisfaction, better health outcomes and increased adherence.

## Consumers say convenience considerations drive medical decisions:



**92%** say convenience is an important factor when choosing their primary care provider

**52%** cite it as a very important factor



Consumers said virtual visits, compared to in-person visits, were more convenient because:

**41%** they didn't have to leave home

**37%** they didn't have to cover transportation costs

**37%** they saved time

## Providers are adding virtual and digital capabilities:

**54%** of providers have added virtual office visit capabilities.

**42%** added an online portal.

**43%** added mobile capabilities (like an app).

## Increasing convenience makes people more likely to seek the medical care they need:

**53%** of providers say the addition of virtual care has increased patient visits.

**93%** of providers believe virtual visits made patients more likely to make appointments...

**88%** ...and keep appointments.



**The virtual care boom that began during the COVID-19 pandemic continues:**

**40%**

of consumers have used virtual visits with their doctor or provider in the last 12 months.

**35%**

of consumers are very likely to consider using a virtual visit if a physical exam is not needed.

A high number of people say they would consider a virtual visit for mental health services, as virtual appointments can offer a more private and convenient way to discuss vulnerable mental health topics such as anxiety, stress or depression.

**48%**

were very likely or somewhat likely to seek out mental health services if they could do so using a virtual visit.

**71%**

think a virtual visit for mental health services would be more convenient for them.

**57%**

thought a virtual visit would be more private and confidential.

**55%**

of consumers said the availability of virtual mental health services would make them more likely to seek this kind of help.

**Consumers will often skip care if it is too expensive.**

Half of consumers reported high to moderate concern around medical office visit costs, such as co-pays. For respondents who self-identified as Black or Hispanic, these cost concerns were prevalent for nearly six in ten people (60% and 58% respectively).

The good news is that primary care physicians and health care providers are discussing affordability and/or financial assistance with medical costs with their patients.

**50%** of respondents who identified as Hispanic

**say their provider regularly discusses medical costs with them**

**45%** of respondents who identified as Black

This points to the need for providers to proactively present cost savings information to their patients, and to increase transparency around cost.

**Consumers, when asked for important factors when choosing a main health care provider:**

**68%**

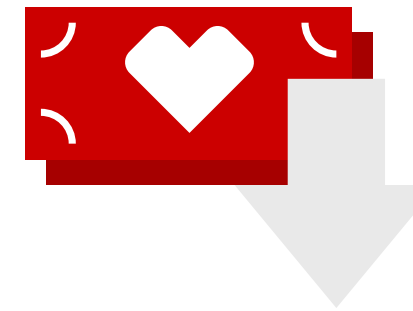
cited in-network coverage by their insurance company.

**92%**

say in-network care is very or somewhat important.

**86%**

say cost is very or somewhat important.



**When getting routine care:**

**54%**

of consumers indicated that an important consideration was if the provider/facility accepted their insurance.

**36%**

of providers said most of their patients face prescription drug price challenges.

**11%**

of providers said ALL their patients face prescription drug price challenges.

**90%**

of providers said cost of care is a top concern for their 65-and-over patients.



**Leveraging tech to make health care more accessible for all**

CVS Health is partnering with leading technology innovators to deliver benefits to consumers. For example, MinuteClinic scheduling is now integrated into Google Search, helping patients find and easily book available appointments for a variety of services within their local communities. In our specialty pharmacy, we are using Microsoft text analytics and robotics to automate the 40% of prescriptions that are still paper or fax-based, making it easier and faster for us to fill the patient's prescription. In addition, we are making progress offering consumers health care wherever and whenever they want. Consumers can purchase health and wellness products online with an option for free, same-day pickup that is now available in approximately 6,000 CVS Pharmacy locations across the country.



# Consumers appreciate frequent health care touchpoints and support

Consumer health care is getting back on track with most consumers feeling the same about their health (29%) or caring even more than before the pandemic (22%), compared to those who worry more about their health (19%) or no longer care about their personal health (5%). However, many continue to struggle with medication adherence or sticking with their health care plan. Given that, consumers acknowledge the value of frequent interventions in adhering to their health goals.

## Supporting women's health care

Women play the leading role in making health care decisions for their families, but they often face barriers when it comes to taking care of themselves. CVS Health is committed to **making women's health care more accessible, equitable and personalized.** Our more than **1,100 MinuteClinic locations** offer a wide range of essential women's health services, including access to birth control, the human papillomavirus (HPV) vaccine, treatment for yeast infections and pregnancy, urinary tract and bladder infection testing, and more.

## Consumers realize good health is hard to maintain without a support system.

More and more, people see a direct connection between how their social and personal lives impact their overall health picture. The majority of consumers — 70% — say it's important that their primary care provider be aware of what their supportive relationships look like.

As might be expected given the enforced isolation of the COVID-19 pandemic, some consumers indicated their social connections have waned over the past year or so.

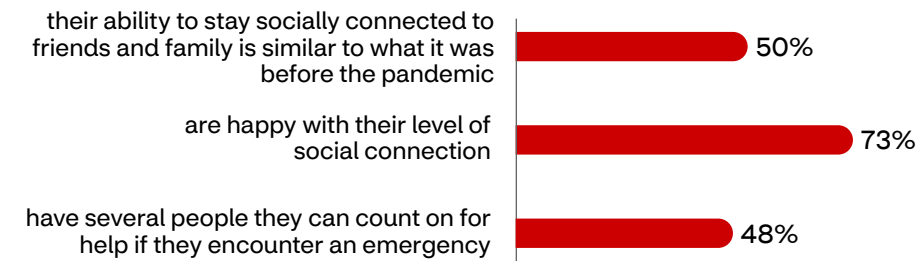
## When asked to rate their ability to stay connected to family and friends in the past 12 months:

**44%** of respondents said they were not as socially connected as they used to be.

**34%** of respondents said they have a strong social circle.

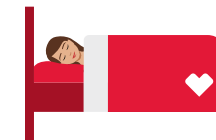


## What do consumers' social lives look like now?



## Support is an important factor in achieving one's health and lifestyle goals.

**People today often view health as what happens between medical appointments. Many people know the daily choices they make influence their health and well-being, and they're aware of where they need to improve.**



**48%** say they'd like to improve their sleep quality to achieve better health.

**41%** say they have adopted fitness goals.

**39%** say they have new nutrition goals.

## Digital tools are proving helpful in developing and keeping new health habits:



**65%** said it was important to their health that they be able to monitor their health with apps, wearable devices, etc.

**59%** said it was important to their health that they have access to virtual and telehealth services.

**Consumers realize good health is hard to maintain without a support system.**

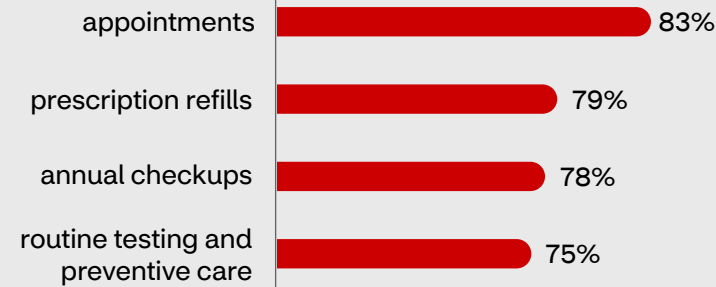
Physicians told us that their patients with chronic or complex conditions and those trying to achieve health goals often find it difficult to stick to their care plans, and have found frequent interventions to be helpful.

**94%**



of providers think interventions such as pharmacist mentions, text reminders or phone follow-ups have a positive impact on a patient's ability to successfully follow the care plan created for them.

Consumers resoundingly agree and report that they would like health care providers to remind them about things like:



Providers understand the important relationship pharmacists have with their patients, playing a trusted role in medication dispensing, education and guidance.

**59%**

of providers indicated that access to pharmacists would be very helpful to their patients.

**41%**

say they recommend touchpoints with a pharmacist to help their patients meet health goals.

**45%**

agree that when treating patients with complex conditions and/or specialty medication needs, pharmacists can provide valuable insights into a patient's medication adherence.



# Consumer trust in providers and providers' pride in their work remain strong despite the challenges of COVID-19

With the worst of the pandemic behind them, consumers report an even higher level of trust in their primary care physician.



This year, 59% of consumers indicated their primary care physician was their most trusted health care provider compared to 49% in 2021:

**55%**  
of respondents said it was because their primary care physician provides quality care

**43%**  
said it was because their primary care physician meets all their health care needs

Compared to how they felt before the pandemic, 44% of consumers say that overall, they now have more appreciation for health care providers:

**43%**  
say they believe health care providers are heroic for working during a pandemic



People also continue to trust their pharmacists and nurses:

**72%**  
said the level of trust they now feel for their pharmacist has stayed about the same as it was before the pandemic

**22%**  
said their level of trust has increased



**67%**  
said the level of trust they now feel for their nurses and nurse practitioners has stayed about the same as it was before the pandemic

**27%**  
said their level of trust has increased





**Providers acknowledge their work can be difficult but provides satisfaction and purpose.**

**50%** of providers say they know they make a difference to many patients.

**41%** say they feel proud to practice medicine.

**26%** report they feel a deep sense of purpose.

With evolving medical information about COVID-19 and vaccine information, consumers are turning to providers to get clear information. In fact, 61% of providers say the rise of anti-science and anti-vax sentiment has not changed how patients trust them.

**Providers report they are still spending a significant amount of time talking to patients about vaccines, which remain a hot topic of concern, especially as new COVID-19 variants emerge:**

**68%** of providers report they always or often discuss COVID-19 prevention/safety and vaccine efficacy with their patients.

A little over half of providers (51%) report that all/most of their patients are likely to proactively discuss how COVID-19 has personally impacted them.

**The COVID-19 pandemic had a negative financial impact on many health care practices, but providers say they're bouncing back.**

As widely reported, many providers during the height of the pandemic saw fewer patients and experienced high appointment cancellation rates, and postponements and cancellations of elective surgeries.

**56%** of providers reported their practice had a negative financial impact because of COVID-19.

**16%** reported a positive financial impact (86% of whom indicated this was due to an increase in patient volume).

**Very few providers cited challenges related to the COVID-19 pandemic as a primary cause of feeling burnt out. Understaffing and growing administrative demands are to blame:**

**37%** of providers have frequently or very frequently felt burned out, possibly to the point of quitting the practice of medicine.

**39%** sometimes feel burned out.



# Conclusion

This year's Health Care Insights Study clearly shows that consumers are depending on their health care providers as sources of trusted medical information amid uncertainty.

The study results also show that the delivery of health care must evolve into a coordinated, accessible, convenient and affordable part of everyday life — especially for underserved and vulnerable populations. Consumers want providers to take the initiative to remind them about preventive and other health care needs and support them in their patient journey.

The COVID-19 pandemic proved to be a catalyst for positive change, reinforcing the importance of overall health and encouraging consumers to take the reins of their own health care.

Collaboration and teamwork — among patients and their care teams — are key to people achieving their health goals. With more consumers now choosing to prioritize their health and wellness post-pandemic, CVS Health remains deeply committed to finding new and better ways to engage with and support people on their health journeys.

We are uniquely positioned to anticipate, deliver and exceed the health care expectations of our patients, customers, clients and members with the integrated health care services we provide. We are addressing the most prevalent, costly and complex health conditions head-on by delivering care to people in the ways that are most meaningful to them — in person, virtually or at home.

As health care delivery continues to expand beyond the four walls of a physician's office we are proud to be partners in the health care journeys of our patients, customers, and clients.

# Methodology

The Health Care Insights Study (HCIS) by CVS Health was first released in 2018.

This year, two questionnaires were fielded by Market Measurement, a national market research consulting firm. The National Consumer questionnaire was comprised of 69 questions and was fielded to 1,000 participants 18 years and older, located throughout the U.S.

In addition to this consumer group, we also surveyed 200 consumers in each of 6 regional areas: Atlanta, Houston, Chicago, Columbus, Philadelphia, and Phoenix, to offer regional insights. We also surveyed 200 consumers who self-identified as Black and 200 consumers who self-identified as Hispanic.

The National Provider questionnaire, consisting of 42 questions, was fielded with 400 health care providers consisting of 175 primary care providers, 75 RNs/LCSWs, 75 pharmacists, and 75 physician's assistants. All respondents had at least two years' experience in their respective field.

