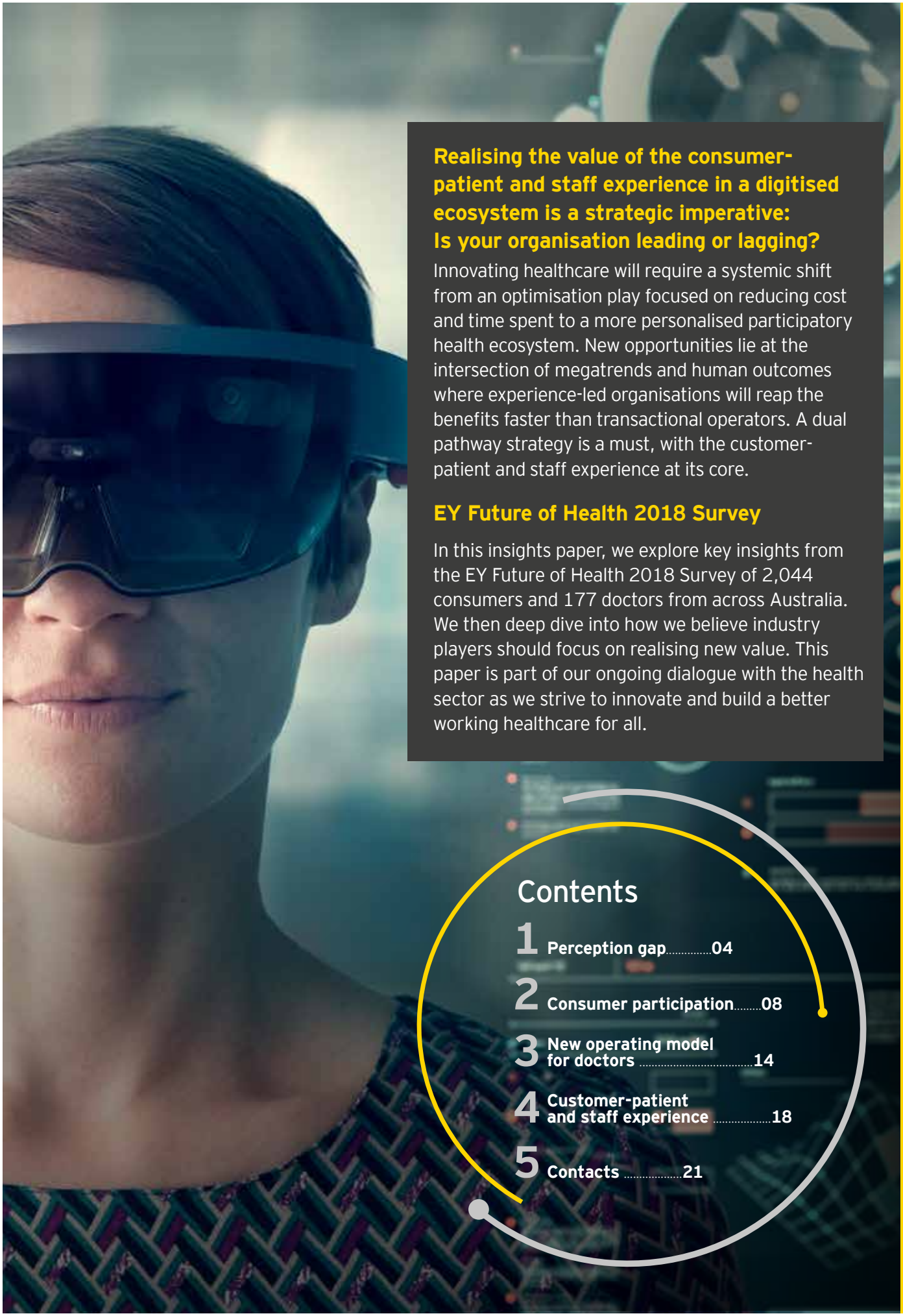
How do you care for today while building the health of tomorrow?

Consumer-patient and staff experience at the centre
Australia insights report
November 2018

The better the question. The better the answer.
The better the world works.

Building a better working world



Realising the value of the consumer-patient and staff experience in a digitised ecosystem is a strategic imperative: Is your organisation leading or lagging?

Innovating healthcare will require a systemic shift from an optimisation play focused on reducing cost and time spent to a more personalised participatory health ecosystem. New opportunities lie at the intersection of megatrends and human outcomes where experience-led organisations will reap the benefits faster than transactional operators. A dual pathway strategy is a must, with the customer-patient and staff experience at its core.

EY Future of Health 2018 Survey

In this insights paper, we explore key insights from the EY Future of Health 2018 Survey of 2,044 consumers and 177 doctors from across Australia. We then deep dive into how we believe industry players should focus on realising new value. This paper is part of our ongoing dialogue with the health sector as we strive to innovate and build a better working healthcare for all.

Contents

Executive summary

Getting the customer-patient and staff experience right reduces customer-patient effort, increases staff engagement and improves financial viability. Australia's Productivity Commission estimates that shifting towards a more patient-centred and digitally driven healthcare system, has the potential to deliver more than $8.5 billion in societal benefits over the next five years.
The Australian healthcare system has been slow to embrace the opportunities of a more digitally engaged customer-base and the multiplication of disruptive digital technologies. The sector is still figuring how to embrace a national digital health record. It is also starting to explore more seriously industry health standards and digital solutions such as robotics process automation, AI-based diagnostics and blockchain. However these remain at best only enablers; they are not the end-game. The convergence of digitally empowered consumers, technological advancements at unprecedented scale and the entrance of non-traditional competitors in the sector is shifting the focus from "reducing cost and time spent" – an optimisation play to "a more personalised participatory health ecosystem" – a re-imagination of health and care as we know it.

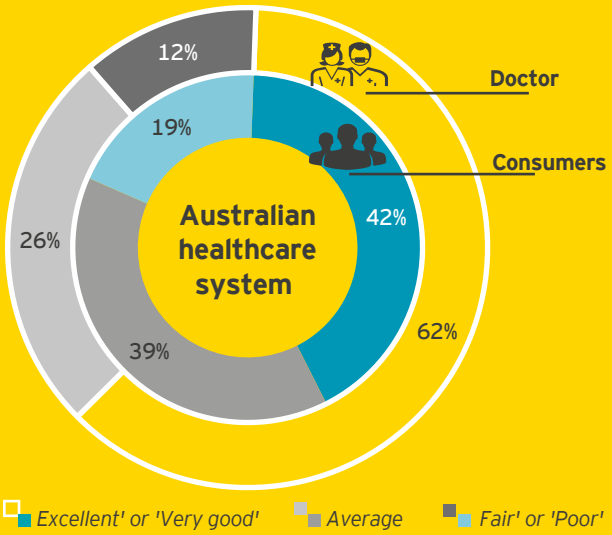
Australia has a first-class health system, ranked as one of the most efficient in the world, at number eight globally for outcomes, cost and value in 2018.[1] But, although we are living longer, the rise in chronic illness means we are not necessarily living better.[2] For many, this means a lifelong relationship with the healthcare system. This relationship will need to be built upon trust and supportive engagement along with a commitment from providers to deliver exemplary patient experience.

In two of the recent EY health thought leadership reports,[3,4] we signal that participatory health, or supporting consumers to make smarter choices and pursue responsible behaviours, is a profoundly disruptive force for change in the healthcare system. And yet, understanding and valuing the end-to-end journey of patient experience of healthcare has received little attention. Described as "the blockbuster drug of the century"[5] increasing patient engagement has long been part of health industry rhetoric. But, the industry has been slow to shift from asking "What is the matter?" to "What matters to you?"[6]

42% of Australian consumers rated our healthcare system as "Excellent" or "Very good" compared with 62% of doctors who rated it as "Excellent" or "Very good".

EY Future of Health Survey 2018

Figure 1. The Australian health care system:
How doctors and consumers rate overall performance



Re-designing the system as integrated and patient-centred has been conservatively estimated to deliver in excess of $8.5 billion in personal and societal gain over five years.

Productivity Commission 2017, Shifting the dial: 5 Year Productivity Review, Report No. 84, Canberra

To help the industry adapt more quickly to innovate healthcare, this discussion paper, focuses on three key findings from EY 2018 Australian Health Consumers and Doctors survey:

Finding #1: There is an experience perception gap between doctors and consumers

The Australian healthcare system is reasonably well regarded by both doctors and consumers. Weighing system performance overall, doctors rate system performance more favourably than consumers.

Finding #2: Consumers want to participate more

Increasingly, consumers expect a system that is easier and simpler to deal with. Eliminating time-wasted through leveraging at-home monitoring and exchanging information with a doctor via a smartphone will release clinician time for highly valued one-on-one interactions. The consumer-patient increasingly wants to be an equal partner in shared clinical decision making.

Finding #3: Doctors need a new operating model for a digitised ecosystem

The current doctor service delivery model needs to be reimagined taking into account what matters to them and their evaluation criteria for adoption of health technologies.

"The growing divide between the digitally engaged consumer-patient and the doctor community that is slower-to-embrace digital innovation requires urgent attention. If the divide is not addressed, incumbents won't realise the promised value; empowered consumers and non-incumbents will redefine how healthcare is experienced".

EY Future of Health Survey 2018

Patient satisfaction is a judgment about whether expectations were met. Patient experience, on the other hand, is an expression of what patients value, including sentiment and the emotional experience of their care, convenience, ease of navigation, responsiveness of staff, coordination between providers and involvement in decision making.

EY Future of Health Survey 2018

Perception gap

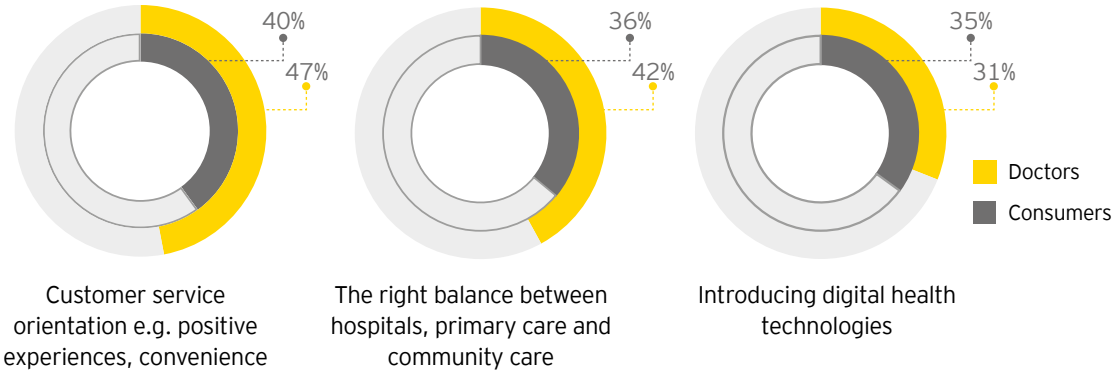
Finding #1

Finding #1 – There is an experience perception gap between doctors and consumers

Doctors perceive the health system performance more positively than consumers. They rate overall system performance, across customer service orientation, balancing care delivery channels and introducing digital health technologies move favourably than consumer-patients. However, both doctors and consumers see room for improvement. (Figure 2)

Figure 2: Doctors and consumers each bring a different lens to the performance of the Australian health care system

How would you rate Australia's health care system's performance in...?



Showing ratings of 'Excellent' + 'Very good'

Compared to other industries, 17% of consumers surveyed rated Australia's health sector as "innovative," 60% rated it as average (refer to the next page for a comparison between Australia vs England vs the Netherlands).

For 60% of doctors, the Australian healthcare system is "Excellent" or "Very good" at introducing the latest treatments, drugs and medical innovations compared to 42% of consumers. Thirty-two percent of doctors say the system is "Average" compared with 39% of consumers. (Figure 3)

Figure 3: Doctor and consumers views divided on health system innovation

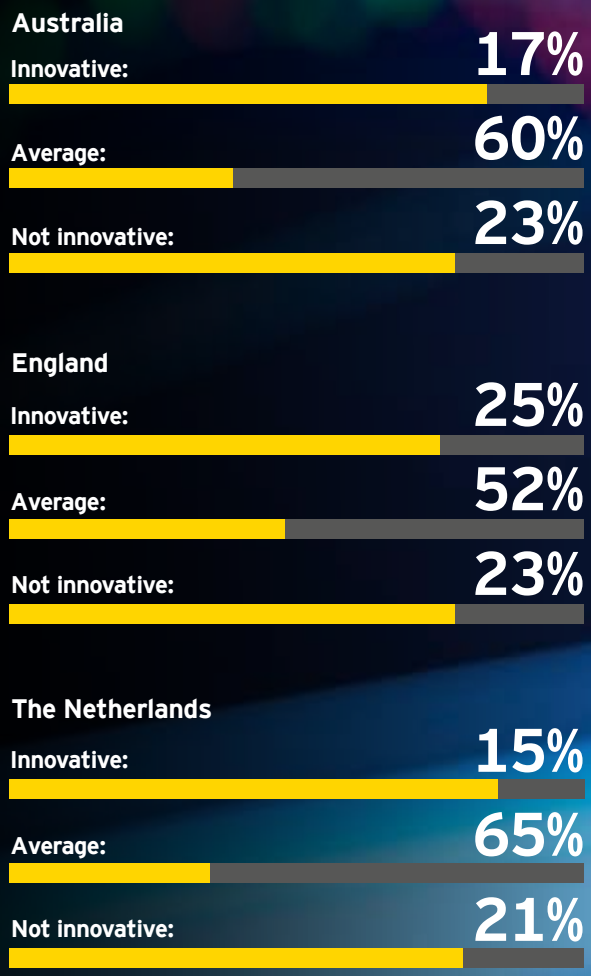
How would you rate Australia's healthcare system's performance in the following areas?

Rating = 'Very good' or 'Excellent'

The advent of the digital health record has prompted fears around privacy and cyber security. However, 56% of doctors rated the Australian healthcare system as "Excellent+ Very Good" at protecting an individual's identity and personal information compared to 50% for consumers.

Weighing the innovativeness of their respective health sectors, consumers in Australia (60%), England (52%) and the Netherlands (65%) consider their particular health sectors 'average', compared to other sectors

Compared to other industries (such as online retailers or banks), consumers rate their health sector as:



Could the healthcare sector accelerate innovation by engaging with consumers as co-creators?

Consumer participation

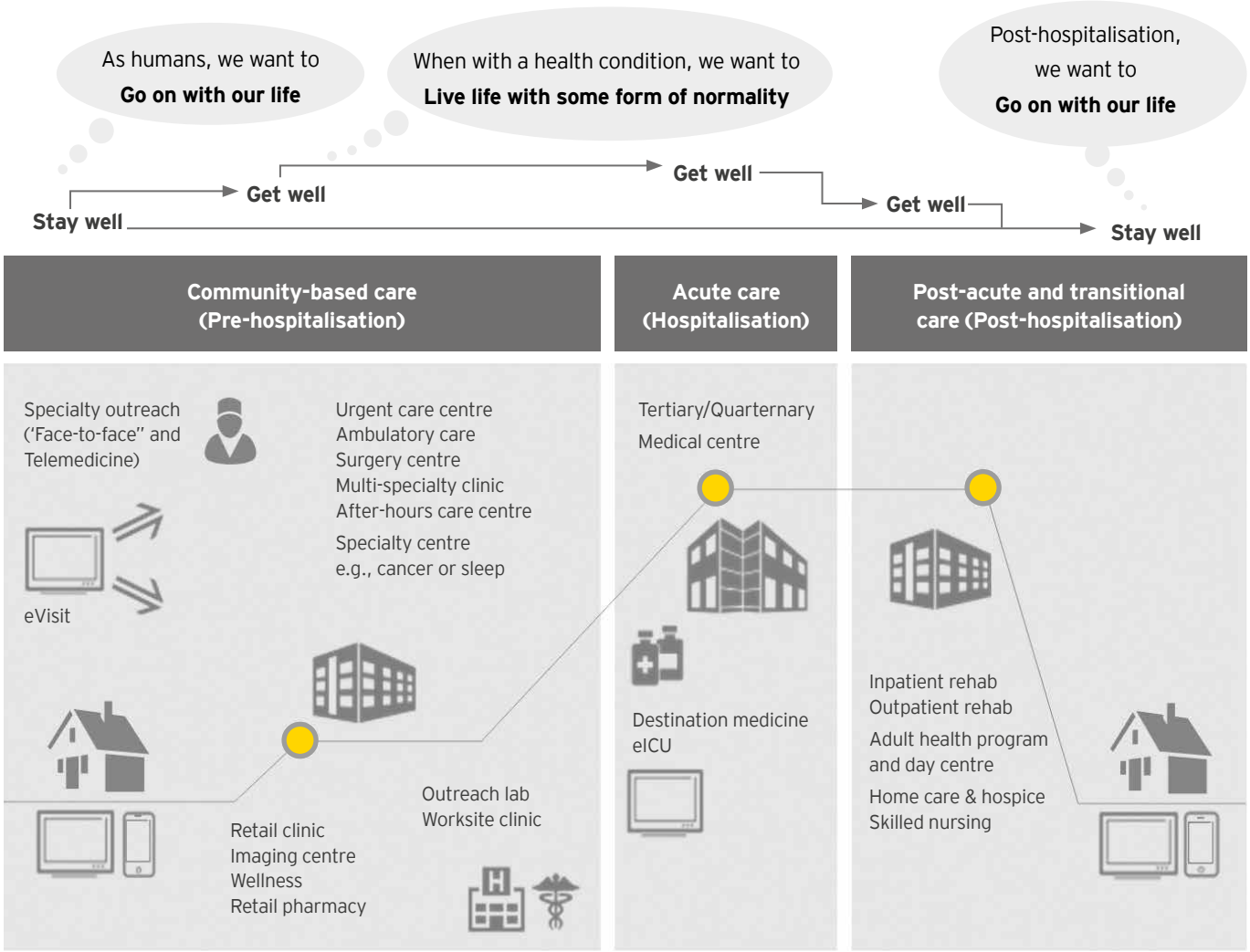
Finding #2

Finding #2 – Consumers want to participate more

Engaging in conversations around perceptions and experiences matters deeply to the individual consumer-patient. Depending on the regulatory environment or facility, patients' experiences are routinely captured in practice.[7] These 'moments in time' are a national indicator of healthcare quality and safety in Australia;[8] and, one of the four dimensions considered essential to optimise health system performance.[9,10] However, what is less well explored are patients' end-to-end experiences across their entire healthcare journey.

Before being a "patient", we are all "humans with basic needs" first. From a need hierarchy basis, we prefer to "go on with our life" and "stay well". When we are not, we still want to "go on with our life" and "get well" as soon as possible or "live with some form of normality" in the case of chronic condition. (Figure 4)

Figure 4: The traditional view is a regulated flow of patients through stages of care



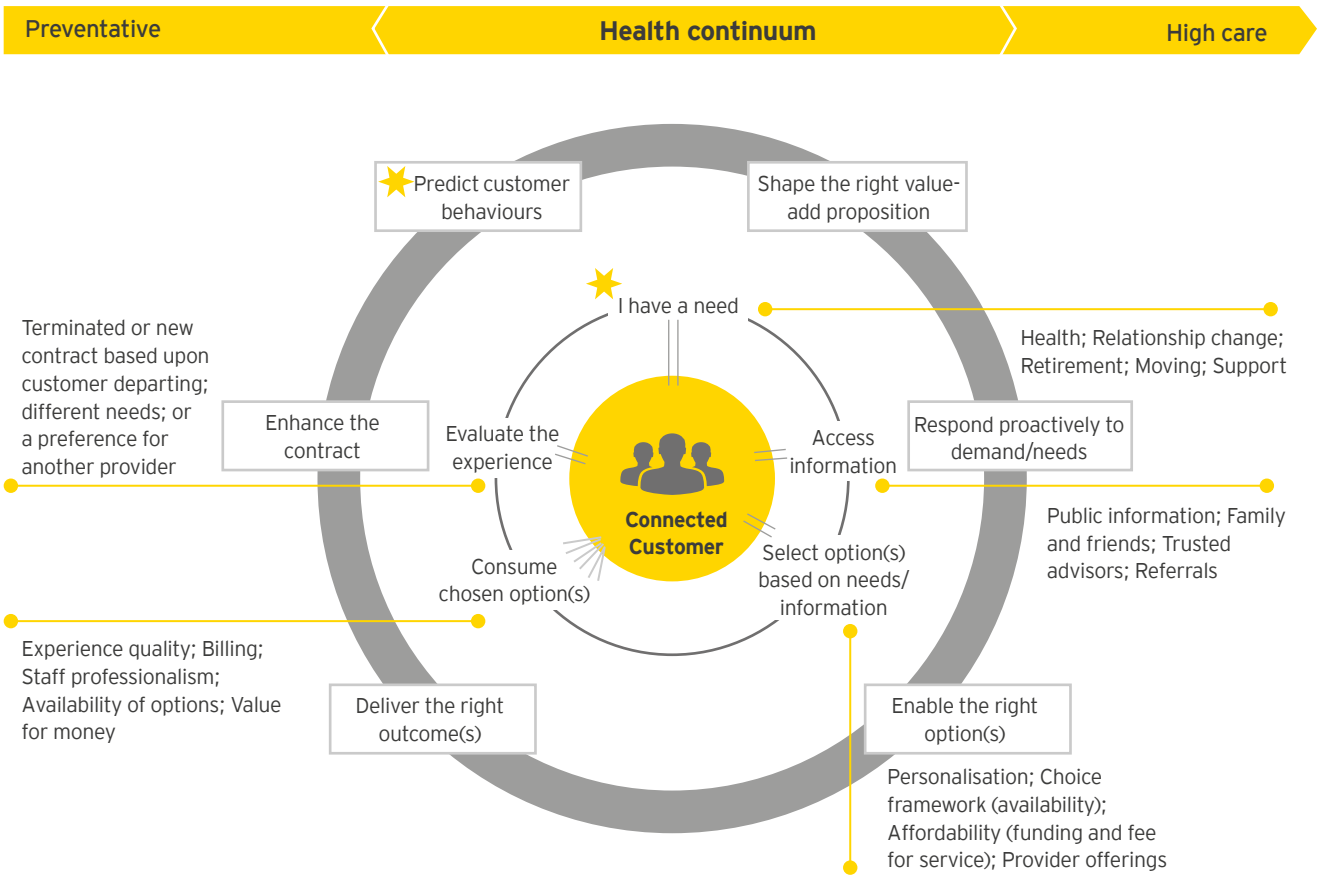
5 issues with the current linear model

1. Patients feel excluded from the decision making process
2. Care is fragmented across specialities and services
3. Patient/provider care experience is inconsistent
4. Roles and responsibilities of staff have not evolved with changes in care
5. Patients seek services that support healthy outcomes and ageing experiences

In a digitised healthcare ecosystem, how can we embrace participation and enable personalised care experiences?

While the traditional supply view of health and care is to think of a regulated flow of patients going through stages as illustrated in Figure 4, from a patient perspective, it's everything but linear. Consumer-patients and their families perceive their healthcare journey through an intensely personal lens. (Figure 5)

Figure 5: The customer-patient experience is everything but linear



> **"They need to focus more on putting the patient first and looking for the most effective long-term outcome for patients"**
>
> Australian consumer, EY Future of Health Survey 2018

Proactive healthcare operators recognise the imperative to be more customer or person centred. Successful ones are investing in "predicting customer behaviours" to "inform future value propositions" and "engage in closed-loop experiences". They operate based on a number of guiding principles, namely:

1. Everyone has a voice and should be listened to
2. Meet customer expectations, first time, every time
3. Help them help themselves, and others
4. Optimise value for customers across the end-to-end journey
5. Deliver an integrated relevant experience
6. Balance cost versus benefits

Consumers want to participate and information is an important condition of active consumer participation. The abundance of new consumer-facing digital solutions is redefining how consumers manage their health and engage with care systems.

For doctors, patients sharing information such as their medical history, lifestyle choices and self-reported outcomes will help them better manage patients' health wellbeing.

For their part, consumers are willing to share a variety of personal health and social information if it means that they will get a better experience and better health outcomes.

Consumers will definitely share/most probably share

76% patient-generated biometric data (e.g. from smartphone monitors)

73% dietary and nutrition intake

58% exercise patterns

75% medical records/ treatment history

71% patient reported outcomes

51% grocery shopping habits

73% lifestyle choices/ habits (smoking, drinking)

65% genetic information

26% financial information

In the last 12 months, have you looked online for....

General research on an illness, injury or health problem	55%
Information to work out what health or medical condition you/ family might have	41%
Information on healthy living (diet, fitness, smoking etc.)	38%

72%

of the consumers surveyed believe that sharing their health related data with doctors will help them become healthier

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Asked which type of information would be useful to help them better manage their consumer-patient health and wellbeing, doctors responded:

Very useful

- 77% for Medical records/treatment history
- 67% for Lifestyle choices/habits (smoking, drinking)

Very useful to quite useful

- 86% for patient reported outcomes
- 85% for Dietary/nutrition intake information
- 75% for Genetic information
- 62% for tracked exercise/activity patterns information

The potential of new health digital technologies lies in redefining how consumers manage their health and engage with care systems. Doctors anticipate remote monitoring and data exchange between consumer and clinician will deliver better and more efficient patient outcomes over time.

Figure 6: Digital tools that help manage health

Doctors To what extent might these technologies deliver better and more efficient outcomes for patients? 'Very' + 'Quite' Effective (N=177)	Consumers* Would you consider using these technologies in the future? 'Somewhat' + 'Very' + 'Extremely' Interested (consumer base)
79% Patients completing doctor or hospital **registration details online** before their visit	69% (1731)
78% Patients making an **appointment online** to see a doctor	71% (1314)
59% Patients using a **sensor device** that connects to their smartphone to check or monitor health	60% (1894)
51% Consulting with patients by **video** on computer or medical device	48% (1935)
49% **Electronic communications** (email, text, social media) between patient and doctor	60% (1786)
48% Patient **sending a photo** to their doctor of an injury/health problem via computer or mobile device	57% (1949)
46% Patients using an **in-home diagnostic test** and sending the information to the doctor	62% (1911)

* Question asked of consumers who indicated they have not previously used these technologies (bases vary)

Consumers show high interest in new technologies, previously unavailable in the health sector, that enable interactions with their care providers. There is strong interest in digital tools that:

- Improve convenience by eliminating time consuming activities such as:
  - "completing doctor or hospital registration details online"
  - "patients making an appointment online to see a doctor"
- Enable the sharing of patient-generated data with doctors such as:
  - "patients using an in-home diagnostic test and sending the information to the doctor"
  - "patients using a sensor device that connects to their smartphone to check or monitor health"

The consumer-patient increasingly wants to be an equal partner in shared clinical decision making. A face-to-face relationship with their health care professional is highly important. The EY survey found consumers only showing an average level of interest for digital tools that help "consult a doctor or health professional by video on your computer or mobile device rather than in-person".

In contrast consumers highly value the opportunity to order prescriptions via a mobile app or to make an appointment online for a doctor, health professional or hospital visit.

Consumers top preference

(Asked to rank top three preferences)

41% **In the future, consumers would like to order prescriptions via mobile apps**

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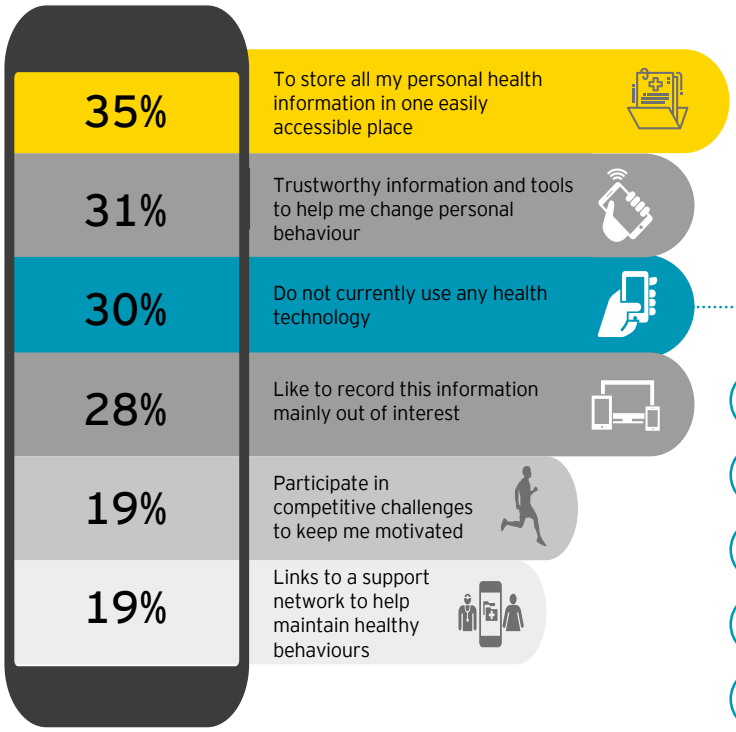
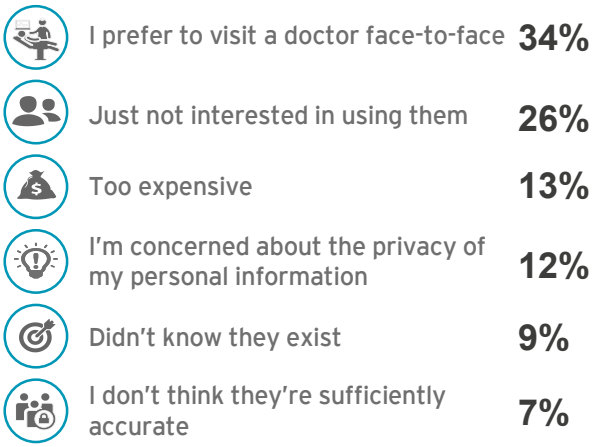
People use health-related technologies (such as personal activity trackers, health apps, patient portals and personalised health or genetic testing) for many reasons. Which of the following reasons are most important and/or helpful to you? (select all that apply)



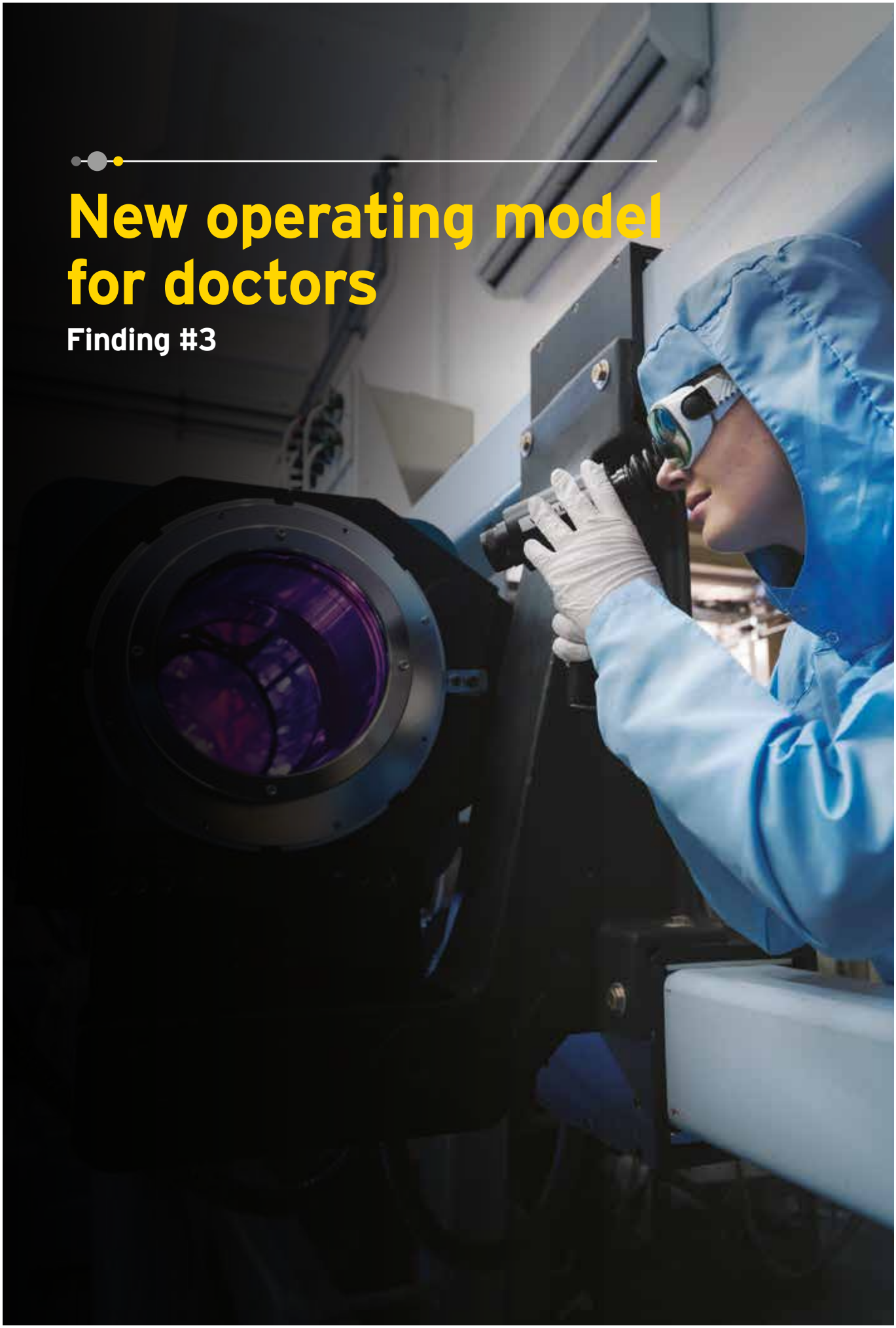
Please select and rank up to three reasons that prevent you from using health-related technologies (top reason shown)



Since the first EY survey of healthcare consumers in 2016, we noted an acceleration in adoption of digital technologies by consumers driven by lifestyle choices and the anticipated benefit of having a personal health record anywhere, anytime. New opportunities lie at the intersection forces at play and human outcomes. Will the incumbents seize the opportunities of participatory health or will they be slow to reimagine the how?

New operating model for doctors

Finding #3



Finding #3 – Doctors need a new operating model for a digitised ecosystem

Doctor attitudes mirror those of consumers to some extent. They believe consumers sharing health and lifestyle information will benefit patient care through improved transparency and more personalised care. (Figure 7)

Figure 7: Patient-generated health data will improve care quality but not decrease doctor or health system burden

How likely is it that consumer/ patient-generated health data (e.g. from mobile phone apps and sensor devices) will result in the following?

Ratings: 'Very likely' or 'Quite likely'

75% **Improved transparency** of patient adherence to treatment plans

75% More **personalised care** plans for patients

73% **Improved quality** of patient care

Ratings: 'Not Very likely' or 'Not at all likely'

54% **Reduced burden on doctors**

47% Reduced burden on the **health care system and costs**

46% **Cost savings** to patients

But many doctors fear being overwhelmed by a sharp increase in expectations and demand, driven by abundance of data and burgeoning consumer devices. They are concerned that their workload will increase with an inflow of vast amounts of patient-generated data, considered unreliable and unhelpful by many.

Further, the doctors surveyed have relatively low levels of digital adoption. Technologies that augment clinical expertise and current processes as well as secure communications with other providers are being adopted but at a slow pace. (Figure 8)

Doctor thoughts about patient-generated health data

"Lack of remuneration for the doctor in collating possibly masses of questionable information"

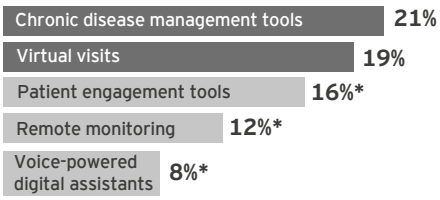
"Accuracy of data and in a usable format?"

"Patients likely to make mistakes, putting the wrong data. Patients do not know what is really happening in very complex medical issues"

Figure 8: Digital health technologies currently used by doctors

Do you currently use any of the following digital health technologies in your [practice/workplace]?

Other technologies in use



*Small sample, indicative only

Although **6%** of consumers have experienced a virtual consultation, **48%** of those who have not, are interested in doing so in the future
(those who say 'extremely/very/somewhat interested')

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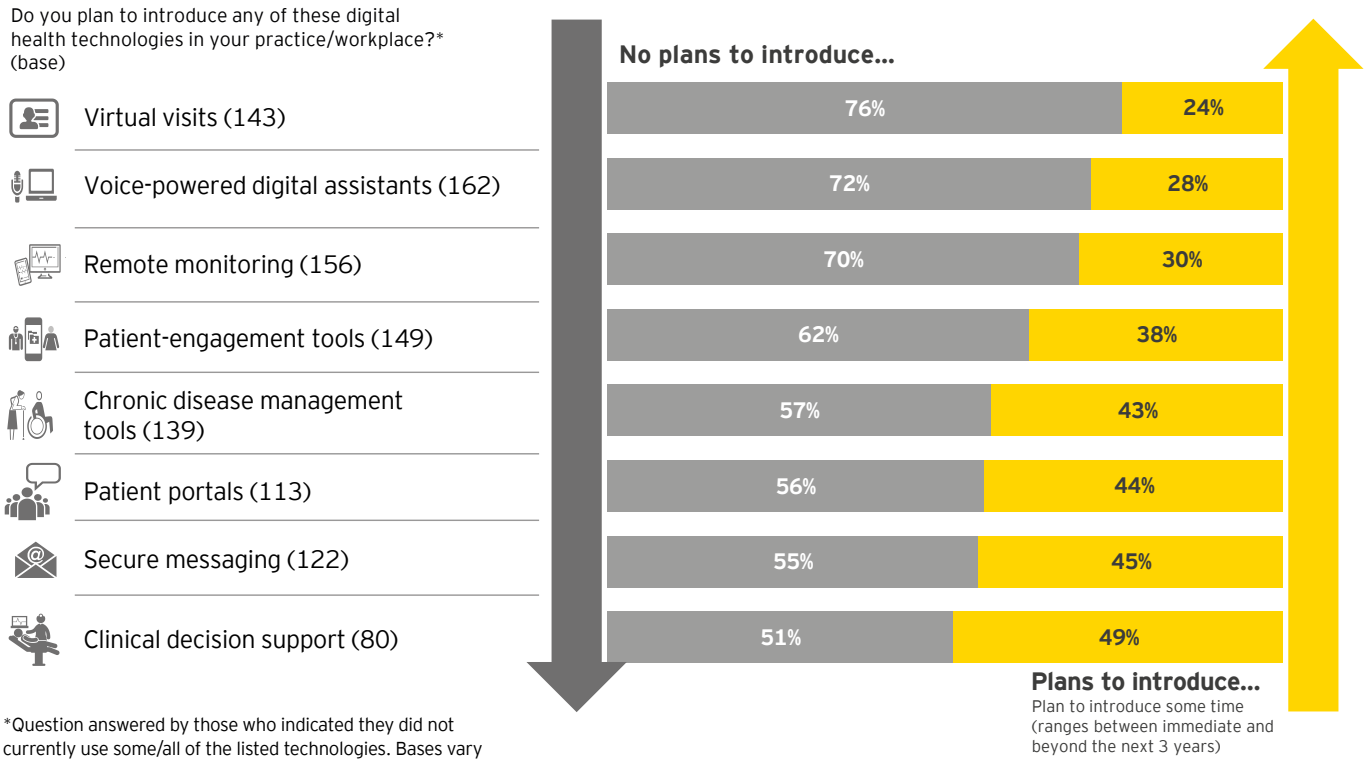
Virtual care models are at an early-stage of maturity. A number of doctors consider virtual care models as an opportunity to deliver greater productivity if the reimbursement mechanism was adapted to the new reality.

According to the EY survey, doctors are not planning to be fast adopters of new digital health technologies in their practice/workplace. Of the eight digital health technologies mentioned, less than 50% of doctors plan to introduce any of the technologies mentioned in the next three years. (Figure 9).

This is a serious challenge for the sector as a whole. **A growing digital divide between the consumer-patient and doctor will come at high cost to all and the community.**

Failing to act with urgency and in a systematic manner will make our healthcare system more costly per outcome delivered and will constrain Australia's ability to provide sustainable health services that meet the needs of our ageing population.

Figure 9: Doctors intend to introduce new digital technologies



*Question answered by those who indicated they did not currently use some/all of the listed technologies. Bases vary

In the next decade, both consumers and doctors see technologies that systematise care delivery systems and processes such as AI, case management and care delivery pathways becoming commonplace.

The management of clinical conditions such as chronic, complex diseases will likely be underpinned by digital technologies that enable remote teams to care for people in their homes. Clinically oriented technologies such as AI assisted diagnostics, imaging analysis and medication management, and precision medicine are expected to become part of the core-business of medicine.

The current doctor service delivery model needs to be reimagined taking into account what matters to them and their evaluation criteria for adoption of health technologies.

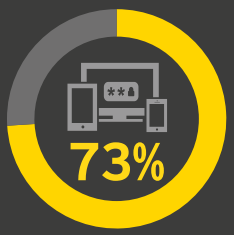
Doctors – health technologies adoption evaluation criteria

How important are each of the following when evaluating whether to select digital health technologies for use in your [practice/workplace]?

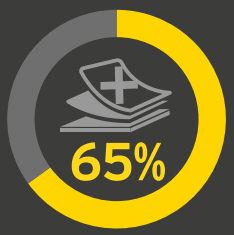
Ratings: Very important

Doctors

Patient safety



Confidence that technology delivers clinically relevant data seamlessly and securely



Integrates into doctors workflow and improves efficiency

On a country comparative basis, to the same question, Dutch doctors not currently using the technologies listed, were considerably more inclined to introduce them than were the British doctors. The Australian doctors were the most conservative of all.

New and non-traditional players will enter the health industry bringing profoundly different ways of approaching the delivery of health and care as illustrated below.

Figure 10: New forces reshaping the healthcare landscape – next 10 years

In the next decade in Australia

65% and 54%

believe that digital technologies will enable care teams to remotely coordinate complex patient care

63% and 44%

believe that companies from outside the health industry will enter health with profoundly different approaches to care

55% and 47%

believe that AI technologies will be commonly used for diagnosis, imaging analysis and medication management

28% and 36%

see virtual hospitals delivering medical care through digital consultations and remote patient monitoring

'Likely' + Very likely' Doctors Consumers

EY Future of Health Survey 2018

How do you realise the value of better customer-patient and staff experience in a digitised ecosystem?

A growing body of evidence suggests that patient-engagement and positive experiences of care deliver personal, social and economic benefits, including: improved clinical outcomes, patient safety, better medication adherence and lower resource utilisation.[11] Positive patient experience has been associated with better financial performance in hospitals, the building of brand and reputation and stronger customer loyalty.[12]

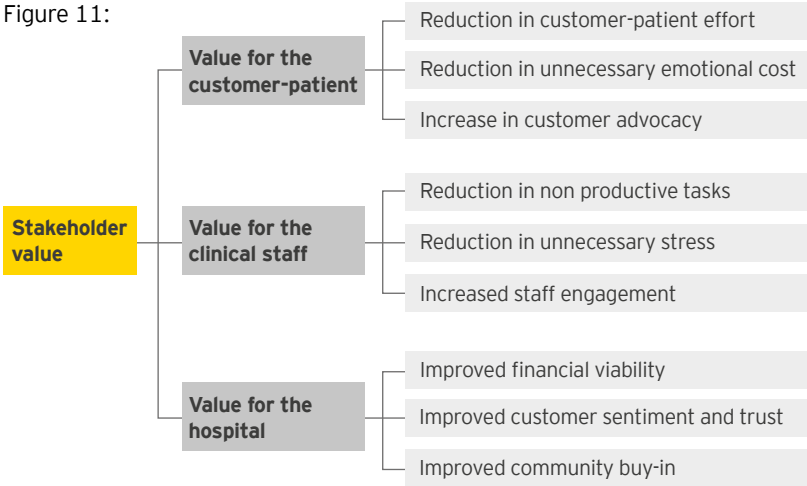
How to realise the value of better customer-patient and staff experience:

Step 1: Size the prize through a value lens

In our experience, it is critical to size the prize through a series of value lens as illustrated by Figure 11.

Qualifying and quantifying the size of the prize and value to be realised help focus effort and resource allocation on what matters most. It also helps with preserving the operational integrity through the value realisation journey.

Figure 11:



Step 2: Challenge your existing assumptions with an evidence-based, data led approach

Figure 12:

2.1. Use customer and operational insights to inform where to focus and why; be assumption free

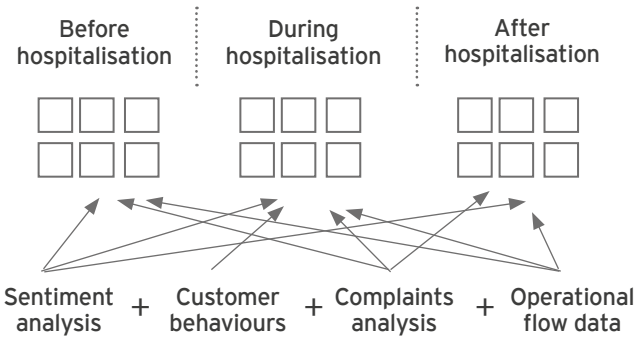
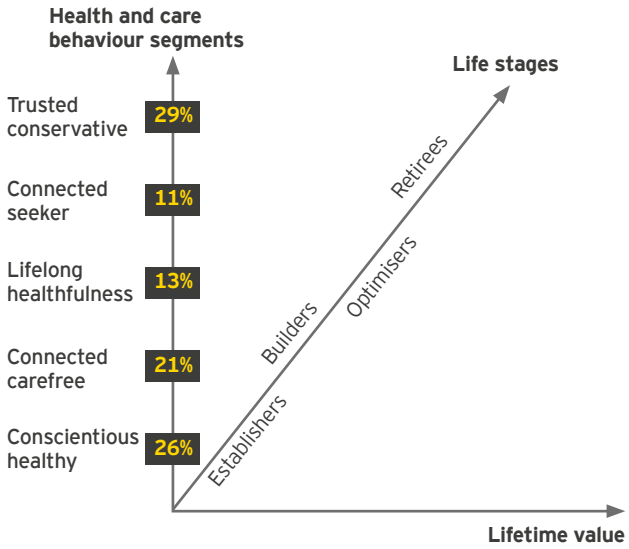


Figure 13:

2.2. Co-design a better lifelong experience through the customer-patient and staff behaviour and attitude lenses

Changing customer behaviours require a human centred design approach to health and care



Source: EY Health and Care customer behaviour segments

Changing customer behaviours require a human centred design (HCD) approach to health and care, across lifestages and a thoughtful consideration of lifetime value.

Step 3: Be disciplined in your pursuit of value creation through a 4-phased approach

Phase 1 — Discover

What is the data telling us from a system thinking point of view?

What are the strategic customer experience decisions we need to agree on?

What are the customer experience hypotheses worth testing from our initial insights, that are actionable and precise?

What are the moments that matter and why (value lens)?

Phase 2 — Co-design

What are the value propositions we need to articulate for our existing and future customers?

What are the pathways to value?

- Business of today (optimisation)
- Business of tomorrow (participatory)

What are the implications on the business model and operating model?

Phase 3 — Activate

How do we best activate the pathways to value execution across:

- The business of today (optimisation lens)
- The participatory health paradigm (re-imagined, connected health and care experience)

How do we prioritise execution and initiatives? (customer-solutions-channels)

Who do we partner with and in what capacity?

Phase 4 — Realise

What are measurable tangibles and intangibles value being delivered to:

- Consumer-patients
- Staff
- Business
- Partner network

What benefits are being realised and what unintended consequences need adjustments?

What do we accelerate vs sustain vs stop doing?

Why EY

Around the world, the health sector is being reimagined in the face of aging populations, increased prevalence of chronic diseases, growth in emerging markets and shifting reimbursement models. Healthcare organisations must address these challenges while mastering the digital innovation that offers both opportunities and threats. Technology empowers patients, real-time analytics improves care and enables a mind shift towards prevention – but also opens the door to new non-traditional competitors. EY teams work with clients to re-position and help optimise their business models, people strategies and operational structures to address cost pressures while leveraging the potential of analytics and technologies to improve quality of care. In this way, we help health organisations stay competitive and deliver better patient outcomes both now and in the future.

In EY Global Health Sector there are more than 6,000 sector-focused assurance, tax, transaction and advisory EY professionals with a range of healthcare and business backgrounds. These talented professionals allow EY teams to rapidly share leading practices and services around the globe and deploy diverse teams to meet your needs. **ey.com/health**

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About this study

In July 2018, EY surveyed 6,113 health care consumers and 530 doctors in three locations: Australia (177 doctors and 2,044 consumers), England (178 doctors and 2,031 consumers) and the Netherlands (175 doctors and 2,038 consumers). Doctors included GPs/primary care practitioners and specialists and respondents worked in a variety of practice settings including solo, group and hospitals. Consumer data were weighted to reflect population and geographic distributions.

The objective of the study was to examine consumer and doctor attitudes and propensity to use digital health technologies for health and wellness; and, to explore willingness to engage with future health care technologies that are accelerating the changing face of health care. Specifically to,

- Develop an understanding of consumer engagement with the health care sector and health-related technology adoption and usage
- Develop an understanding of doctor attitudes towards and perceived benefits derived from health care technologies
- Explore perceptions about and willingness to engage with upcoming digital health technologies

Endnotes

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