Consumers edging toward impatience

Consumer appetite for digitally driven care is rising

A NextWave Health report

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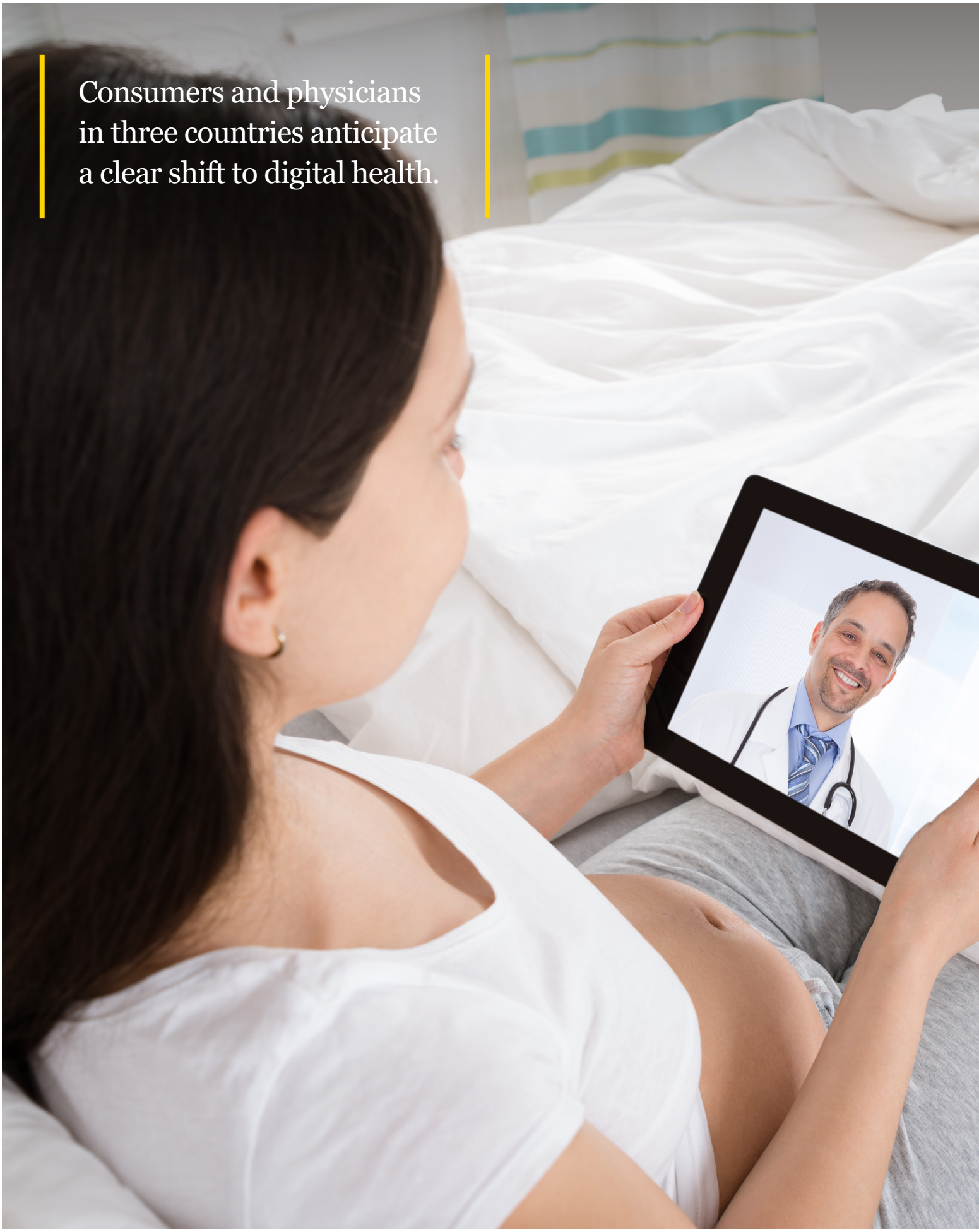


Consumers and physicians in three countries anticipate a clear shift to digital health.

In the eyes of consumers, health care is an increasingly digital proposition. They expect what they take for granted in other areas of their lives—a seamless and digitally convenient sector.

In mid-2018, EY surveyed 530 physicians and 6,113 consumers in Australia, England and the Netherlands to get a deeper appreciation of consumer and physician use of, and sentiment toward, digital health technologies.

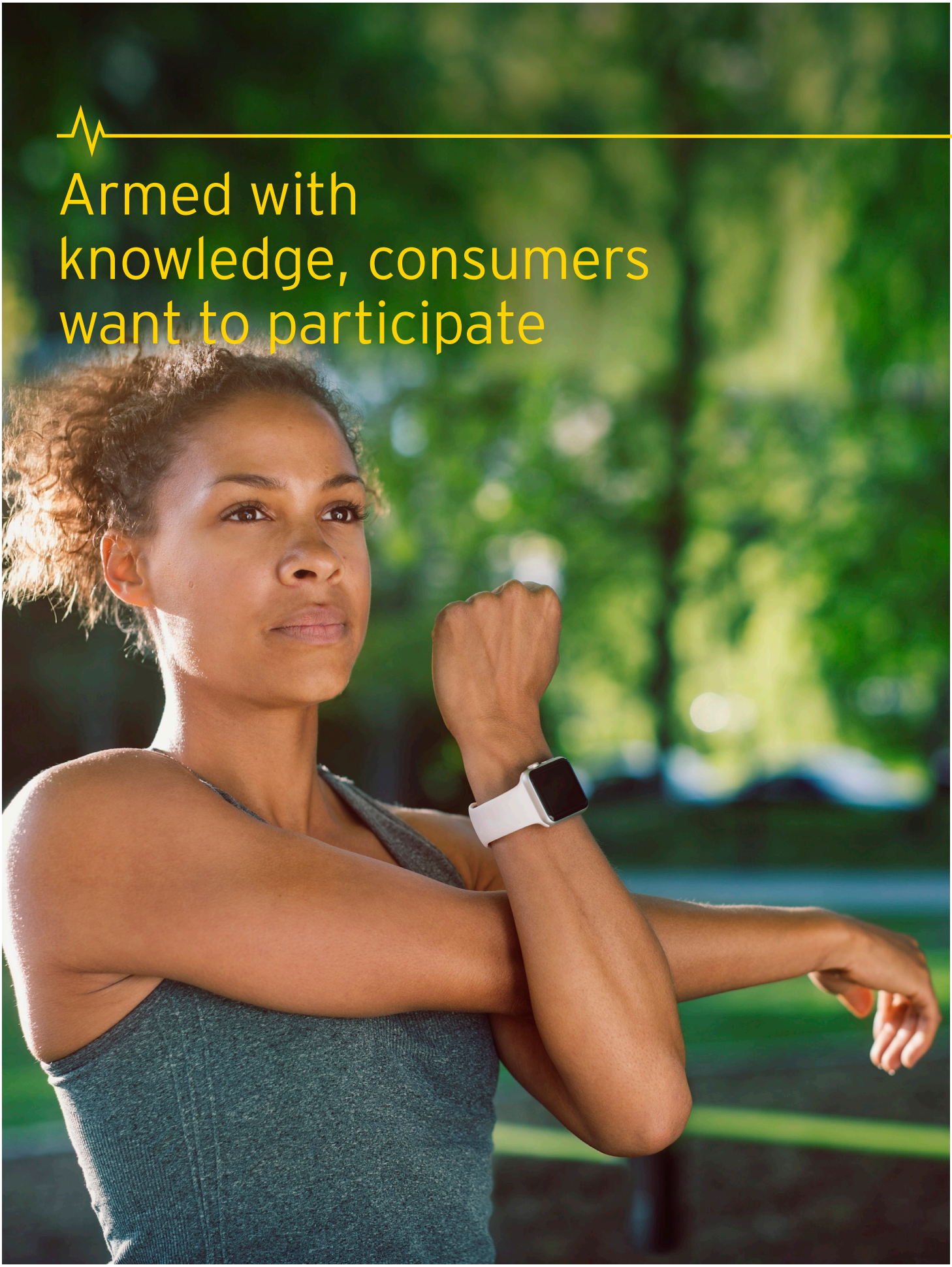
We found consumers have a head start on physicians in their enthusiasm for consumer-facing digital health technologies. They welcome the flexibility and choices that technologies bring to meet their growing expectations of convenience, personalization and ease of navigation through their lifelong health journey. On the other hand, although physicians consider that consumer-facing technologies may contribute to better outcomes, at present their technology priorities lie with clinical and practice support. Tech-enabled care tools that engage with consumers outside of the clinical setting have yet to be widely incorporated into practice as usual.

As health care shifts quickly toward a more personalized participatory health ecosystem, closing this gap becomes important. Convergence between digitally empowered consumers and the promise of a vast range of digital health technologies means that the context of care is changing profoundly. This demands a very different way of thinking.

Clear consumer appetite exists for tech-enabled approaches to care beyond the traditional. Service providers must now be able to deliver connected and highly personalized patient experiences. As consumer demand for and adoption of tech-enabled care reaches the tipping point, industry players, including provider organizations, payers and physicians, will be challenged to respond – or face being out-competed and left behind.

A personalized participatory health ecosystem

Armed with knowledge, consumers want to participate



A leading edge of digitally engaged consumers in all three countries welcomes a consumer-centric system that is more convenient and delivers a better patient experience. Access to relevant information enables consumers to ask better questions and to make informed choices – both essential for active participation. Combining the data from the three countries shows that in the past year, consumers:

- Self-service, turning to the internet for health information. In the last 12 months, half (50%) have undertaken general research online on a health matter or have searched for diagnostic information (38%) or healthy living content such as diet or fitness advice (38%).
- Actively research a diagnosis or condition online to inform in-person discussions with their physician (33%). In particular, of those with an ongoing health condition, 42% searched online for information to discuss with their care provider.

Consumer-facing personal health technologies such as symptom checkers, mobile apps and activity trackers are in abundance and are simple yet powerful tools of participation – ones that redefine how individuals manage their health and engage with care systems. Consumers in all three countries, but especially those in Australia and England, show a high degree of interest in using technologies that will likely moderate the demand for care. For example, close to three in five (58%) of consumers overall consider helpful symptom checkers that guide or triage decisions to seek care. Greater self-knowledge and self-monitoring through using mobile apps and activity trackers are also favored. Overall, around half (47%) of consumers are open to emerging technologies such as chatbots (intelligent health assistants) that can provide information and reassurance and quickly address solvable concerns that don't warrant an office visit.

In the past 12 months, consumers have looked online for ...

	AUS	ENG	NED
General research on an illness, injury or health problem	55%	54%	42%
Information on healthy living (diet, fitness, smoking, etc.)	41%	38%	34%
Information to work out what health and medical condition you/family might have	38%	40%	35%
Information on possible diagnoses and treatments to discuss at a medical appointment	36%	35%	28%

Consumers (n) = Australia 2,044; England 2,031; the Netherlands 2,038

Consumers

Which of the following would assist you to better monitor and manage your health?

	AUS	ENG	NED
Symptom checkers that help you decide whether you need to see a doctor	62%	66%	48%
Health app on a mobile device to track and monitor personal health	59%	61%	47%
Personal activity tracker to record data on health and exercise patterns	52%	54%	39%
Intelligent health assistant on your phone that interacts with you about health and well-being	51%	53%	37%
Personal health coach or navigator to maintain health and wellness	50%	52%	39%

"Very helpful" and "Somewhat helpful"

Simpler and more convenient care systems

What is important to consumers is to use technology to free up time for the highly valued in-person interactions with their care provider. Eliminating time wasted through leveraging online communication tools and at-home monitoring and avoiding unnecessary visits (for example, through ordering prescription refills online) met with approval across the board. In all three countries, the right levers, including lower cost and time savings (50%), greater convenience (47%) and appropriateness (for things that don't need to be done in person) (38%), would encourage consumers to engage digitally with their care providers.

Digital organizational tools that simplify and streamline by taking away some of the pain points of interacting with the system, such as making physician appointments online, are welcome improvements. Consumers show high interest in emerging or early-stage technologies that enable interactions with their care providers. There is strong interest in digital tools that improve convenience and deliver better health outcomes by:

- Eliminating time-consuming activities such as:
  - Completing doctor or hospital registration details online
  - Patients making an appointment online to see a doctor
  - Communicating electronically with a health provider
- Enable the sharing of patient-generated data with physicians 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

And physicians agree. Overall, more than 8 in 10 physicians consider technologies that reduce administrative burden such as making appointments online (84%) and completing paperwork online before a consultation (81%) will make care more efficient and be more convenient for patients. Tools that augment the patient-provider relationship and improve the consumer experience are seen as valuable. The use of virtual technologies for communication between physician and patient is viewed favorably by physicians (62%); more than two-thirds see a benefit in patients using smartphones to capture and send biometric data (68%). Notably, consumers are highly willing to share with physicians their biometric data (75%) and patient-generated data (70%) and believe that sharing this definitely leads to improved health (72%).

Physicians

"To what extent might these technologies deliver better and more efficient outcomes for patients?"

"Very effective" and "Quite effective"

	AUS	ENG	NED
Patients completing doctor or hospital registration details online before their visit	79%	80%	85%
Patients making an appointment online to see a doctor	78%	85%	87%
Patients using a sensor device that connects to their smartphone to check or monitor health	59%	69%	77%
Consulting with patients by video on computer or medical device	51%	59%	59%
Electronic communications (email, text, social media) between patient and physician	49%	65%	73%
Patients using an in-home diagnostic test and sending the information to the doctor	46%	63%	62%

Australia n=177; England n=178; the Netherlands n=175
Data are rounded.

> "Allow the patient to pick up regular ongoing prescriptions at medical reception rather than making an appointment, then waiting, waiting to see a doctor. Complete waste of time and funds.
>
> (Consumer)

Technologies that augment patient safety and clinical excellence and facilitate communications with consumers are priorities for many physicians.

Current and future use of digital health technologies

Consumers

	Made an appointment online for a doctor, health professional or hospital visit		Completed a registration form online before you visit a doctor, health professional or hospital		Communicated with a doctor or other health professional electronically		Used a smartphone connected device and sent the information to your medical professional		Ordered prescription drug refills using apps on your phone		Used an at-home diagnostic test kit and sent the information to your medical professional		Consulted a medical professional by video on your computer or mobile device rather than in person	
Future use showing "Very interested" and "Extremely interested." Bases vary (n)	Past use	Future use	Past use	Future use	Past use	Future use	Past use	Future use	Past use	Future use	Past use	Future use	Past use	Future use
AUS	37%	44% (1,314)	15%	40% (1,731)	13%	32% (1,786)	9%	31% (1,894)	7%	39% (1,907)	7%	31% (1,911)	6%	24% (1,935)
ENG	31%	62% (1,381)	13%	51% (1,761)	14%	41% (1,748)	9%	39% (1,852)	14%	50% (1,755)	9%	44% (1,847)	7%	35% (1,901)
NED	24%	40% (1,536)	16%	25% (1,722)	14%	22% (1,760)	3%	22% (1,972)	8%	36% (1,857)	3%	22% (1,973)	4%	15% (1,960)

Consumers (n) = Australia 2,044; England 2,031; the Netherlands 2,038

Past use asked all respondents, "Have you used any of the following health technologies either currently or have done so in the past?" (Select all that apply.)

Future use asked respondents who indicated they had not previously used these technologies, "Would you consider using these technologies in the future?" Bases vary (n)

Physicians

	Clinical decision support		Patient portals		Secure messaging		Chronic disease management tools		Virtual visits		Patient engagement tools		Remote monitoring		Voice-powered digital assistants	
(Base)	Currently use	Plan to introduce	Currently use	Plan to introduce	Currently use	Plan to introduce	Currently use	Plan to introduce	Currently use	Plan to introduce	Currently use	Plan to introduce	Currently use	Plan to introduce	Currently use	Plan to introduce
AUS	55%	49% (80)	36%	44% (113)	31%	45% (122)	21%	43% (139)	19%	24% (143)	16%*	38% (149)	12%*	30% (156)	8%*	28% (162)
ENG	61%	51% (70)	44%	56% (100)	47%	55% (94)	20%	37% (142)	13%*	35% (155)	15%*	34% (151)	15%*	36% (152)	15%*	31% (151)
NED	50%	48% (88)	38%	66% (108)	70%	74% (53)	14%*	52% (151)	7%*	47% (162)	18%	45% (144)	9%*	37% (160)	10%*	20% (157)

Australia n = 177; England n = 178; the Netherlands n = 175

Currently use asked, "Do you currently use any of the following digital health technologies in your (practice/workplace)?"

Plan to introduce asked those who indicated they did not currently use some/all of the listed technologies, "Do you plan to introduce any of these digital health technologies in your (practice/workplace)?" Bases vary.

*Small sample, indicative only

Physicians will need to reimagine their use of digital technologies

Technologies that augment patient safety, clinical excellence and facilitate communications with consumers are priorities for many physicians. Of those who do not currently use these capabilities, around half (an average of 53%) intend to implement them in their workplace within the next three years. Tools less used by physicians tend to be patient-oriented. For example, few currently use patient engagement tools such as apps that help patients reach health goals or chronic disease management tools to deliver digital programs to assist with weight loss or diabetes management. Virtual care such as video consultations and remote monitoring were also less likely to be in use. And physicians don't plan to introduce these into their workplaces any time soon; overall, a majority of physicians not currently using such technologies have no plans to use voice-powered digital assistants (74%), use remote monitoring at home with clinical-grade devices that send information to physicians (65%) or introduce virtual visits (64%).

A majority of physicians say that data originating outside of a clinical setting (i.e., patient-generated health data or PGHD) is "very likely" or "quite likely" to deliver more personalized care (80%) and better clinical outcomes (75%). But physicians fear being overwhelmed by low-value data and a sharp increase in expectations and demand, driven by vast data inflow and burgeoning consumer devices. Fewer than one in five (18%) physicians consider PGHD will lower either physician or health system burden.

In the future, consumers would like to ...

Top preference. (Ranked top three preferences)

AUS	41%	Order prescriptions via mobile apps
ENG	42%	Make an appointment online for a doctor, health professional or hospital visit
NED	50%	Make an appointment online for a doctor or hospital visit

Consumers (n) = Australia 2,044; England 2,031; the Netherlands 2,038

> Enable internet or smartphone app consultation with my doctor to determine whether a straightforward solution can be [found] or whether I need a face-to-face visit. Financial reward should be at such ... a rate ... as to provide an incentive to medicos to engage digitally.
>
> (Consumer)

Addressing the growing digital divide is paramount

Consumers want health care to be easier. They see value in terms of convenience and flexibility, cost and their patient experience and are open to technologies that simplify and systematize the system. A leading edge of consumers are creating a pull force, actively seeking benefit vested by digital health technologies. And yet, health systems have been slow to leverage the possibilities offered by the disruptive combination of ubiquitous personal technologies together with digitally smart consumers.

As health care consumerism further matures, it will be important to bridge the gap between what consumers want and what is available to them. Industry players will need to pay close attention to consumers' digital expectations, understanding these through data analytics and developing consistent, data-rich experiences. Connecting, combining and developing meaningful insights from the volumes of data generated through tech-enabled care models will be a powerful tool in delivering patient-centered, intelligent and connected health care.

A new digital ecosystem will demand a new operating model built around digitally enabled products and services, routinely and efficiently used in daily practice. Therefore, it is pressing to pay attention to the growing divide between the digitally engaged consumer and the health community that is slower to embrace digital innovation. Other industries such as consumer banking and retail have already moved toward a consumer-directed environment. When will the tipping point of tech-enabled consumer-centric care be reached in health care?

For a growing number of health care consumers, it is long overdue.

About the study

In July 2018, EY surveyed online 530 physicians and 6,113 health care consumers in three locations: Australia (177 physicians and 2,044 consumers), England (178 physicians and 2,031 consumers) and the Netherlands (175 physicians and 2,038 consumers). Physicians 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 survey was translated into Dutch.

In this study, we define digital health technologies broadly as an array of technologies that underpin different ways of delivering health and care to support participation and drive better health outcomes, improve quality of care and optimize business models.

The objective of the study was to examine consumer and physician attitudes and propensity to use digital health technologies for health and wellness, as well as 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 physician attitudes toward and perceived benefits derived from health care technologies
- Explore perceptions about and willingness to engage with upcoming digital health technologies

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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. Health care organizations 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 works with clients to reposition and optimize 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 organizations stay competitive and deliver better patient outcomes both now and in the future.

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