

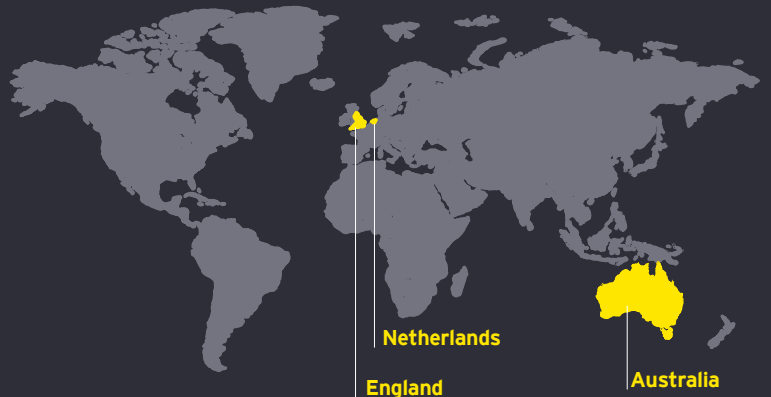
The next wave in health

For developments in health care technology to be effective, they must simplify, systematize, and give more time to patients and physicians.

We surveyed:



Located in:



Current consumer sentiment toward tech-enabled care

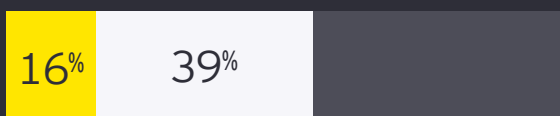


of consumers express willingness to utilize an on-demand e-visit for common acute symptoms



of consumers find mobile health apps helpful to better track their health, or use an online symptom checker to help decide if they need to see a doctor

Current and future physician outlook for tech-enabled care



■ physicians currently use patient engagement tools
■ plan to introduce them in the future

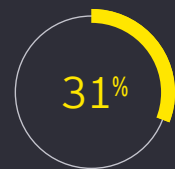


■ physicians currently use virtual visits
■ plan to introduce them in the future

Consumers and physicians we surveyed anticipate a clear shift to digital health



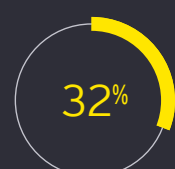
of consumers are willing to be treated at a virtual hospital, with no beds, that delivers basic and advanced care through digital consultations and remote monitoring



of total respondents are willing to undergo treatment from smart products, like a smart pill that would travel through blood and deliver messages to the consumer's nearby mobile phone



In the past, only 6% of consumers have used an in-home diagnostic kit, and sent the information to a medical professional...



...but that number jumps to 32% when you ask the same consumers if they expect to use those kits in the future

Physicians and consumers anticipate in the next decade...



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



Of consumers believe that remote coordination, enabled by digital technologies, will assist in remotely coordinating care