Welcome

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Conflicts of Interest

Kaveh Safavi
Has no real or apparent conflicts of interest to report.
Agenda

**Learning objectives**

*How the healthcare experience is changing during the global pandemic*

*Moving digital technology adoption from reaction to revolution*

**Q&A**
Learning objectives

We have three learning objectives

Learning objective 1
Identify the key factors that influence positive healthcare experiences for people today

Learning objective 2
Discover trends that inform what is needed to leverage digital technologies beyond its current levels in the future

Learning objective 3
How to leverage the power of technology and human ingenuity to improve digital adoption, experiences and trust in this new era
About the health and life sciences experience survey

The 2021 Accenture Health and Life Sciences Experience Survey included nearly 1,800 people in the United States

Sample findings...

Three in four..

...people want to have a say in the usage of their personal health information. Many do not trust the organization using the information.

One in four...

...people we surveyed said their access to healthcare has been better since the onset of the COVID-19 pandemic.

More than a quarter...

... of survey respondents did not use any digital technologies to manage their health in the past year.

When it comes to ...

... care experience, emotional support by the medical provider is just as important as medical treatment, say one in two people.
We surveyed almost 12,000 people in 14 countries to assess their attitudes and healthcare experience

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample size (unweighted)</th>
<th>Patient</th>
<th>Non-patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>1,755</td>
<td>887</td>
<td>868</td>
</tr>
<tr>
<td>UK</td>
<td>1,200</td>
<td>541</td>
<td>659</td>
</tr>
<tr>
<td>India</td>
<td>873</td>
<td>294</td>
<td>579</td>
</tr>
<tr>
<td>China</td>
<td>806</td>
<td>241</td>
<td>565</td>
</tr>
<tr>
<td>Ireland</td>
<td>657</td>
<td>227</td>
<td>430</td>
</tr>
<tr>
<td>Italy</td>
<td>718</td>
<td>253</td>
<td>465</td>
</tr>
<tr>
<td>Germany</td>
<td>872</td>
<td>441</td>
<td>431</td>
</tr>
<tr>
<td>France</td>
<td>822</td>
<td>327</td>
<td>495</td>
</tr>
<tr>
<td>Finland</td>
<td>662</td>
<td>279</td>
<td>383</td>
</tr>
<tr>
<td>Spain</td>
<td>675</td>
<td>326</td>
<td>349</td>
</tr>
<tr>
<td>Singapore</td>
<td>653</td>
<td>136</td>
<td>517</td>
</tr>
<tr>
<td>Australia</td>
<td>649</td>
<td>295</td>
<td>354</td>
</tr>
<tr>
<td>Japan</td>
<td>833</td>
<td>196</td>
<td>637</td>
</tr>
<tr>
<td>Norway</td>
<td>648</td>
<td>242</td>
<td>406</td>
</tr>
<tr>
<td>Total</td>
<td>11,823</td>
<td>4,685</td>
<td>7,138</td>
</tr>
</tbody>
</table>

Note: Patient is defined as a respondent who selects at least one of the six therapeutic areas (Oncology, Cardiology, Respiratory, Gastro, Neurology, Immunology)
How the healthcare experience is changing in the light of the global pandemic

Agenda details…

Key question: Has healthcare really made the lasting improvements we expected to see?

- **Technology**: did interest in digital technology come, then go?
- **Experience**: elevating experiences to improve outcomes
- **Access**: overcoming barriers so people get the healthcare they need
- **Trust**: does it vary across the health ecosystem, hindering care?

Summary: Moving digital technology adoption from reaction to revolution
Did interest in digital technology come, then go?

Key findings:

Uptick in select technologies, downward trend for others

- Virtual consultations (32%) and electronic health records (31%) were the top used digital technologies
- Mobility-related (18%) and social media health technologies (12%) usage declined
- Newer technologies use like RPM and digital therapeutics grew significantly from a small basis (10%)

Take away:

- Tech adoption provides a mixed picture and people seem not to embrace the digital options for healthcare services as much as they do for services in other industries
Did interest in digital technology come, then go?

Q. Which, if any, of the following digital technologies have you used to manage your health in the past year? (responses in %)

Source 2021 Accenture Health and Life Sciences Experience Survey
**Did interest in digital technology come, then go?**

- Some newer technologies usage grew significantly from a small basis

**Q. Which, if any, of the following digital technologies have you used to manage your health in the past year? (responses in %)**

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2018</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote patient monitoring</td>
<td>8</td>
<td>16</td>
<td>3</td>
<td>10</td>
</tr>
<tr>
<td>Chatbots/Voice-enabled</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Digital therapeutics</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>10</td>
</tr>
</tbody>
</table>

Source 2021 Accenture Health and Life Sciences Experience Survey
People would be more likely to adopt digital technologies if a provider recommended them

- Ecosystems need to build more confidence in data security and privacy
- Value add information needs become more visible

Q: Which, if any, of the following would make you more likely to use digital technology to manage your health?

- Recommendations from my medical provider: 33%
- If I had more confidence in data security and privacy: 30%
- If I could receive better information about my health: 30%
- If I knew more about what digital options were available to me: 20%

Source: 2021 Accenture Health and Life Sciences Experience Survey
Are there lasting consequences from negative healthcare experiences?

Key findings:

Experiences are mixed, with variety of consequences

- Only one out of three people said they did not have a negative experience with a medical provider, pharmacy or hospital
- Two-thirds of our respondents reported issues around various aspects, i.e. the visit was not efficient (22%), medical advice was not helpful (19%), surprises about the cost of care (17%)
- Nearly half (44%) of the people reporting negative experiences felt stressed or upset by these experiences, and there were additional consequences including switching or skipping care

Take away:

- Negative experiences affect almost all people who had it and lead to sometimes harmful consequences
Factors driving a negative experience

- There are frustrations when it comes to care efficiency, medical advice and cost of care

Q: Thinking about the last time you personally had a negative experience with a medical provider, pharmacy or hospital. Which, if any, of the following describe what made that experience negative?

- The visit was not efficient: 22%
- The medical advice was not helpful: 19%
- I was surprised at the cost: 17%

Source: 2021 Accenture Health and Life Sciences Experience Survey
Consequences of a negative experience

- The clear majority of people who had a negative experience said it affected them
- Some people were affected in a harmful way by not keeping up with their treatment or prescriptions

Q: Which, if any, of the following ways did that negative healthcare experience affect you?

- 44% I was stressed/upset
- 34% I was less likely to seek medical care the next time I needed it
- 34% I switched medical providers/treatments
- 12% Not applicable – the negative experience didn’t affect me at all

Source 2021 Accenture Health and Life Sciences Experience Survey
Factors driving a positive experience

- People want to receive emotional support just as much as they want to receive medical support
- Empathy is as important as the medical treatment for the majority of people
- Digital technology plays a minor role in the overall experience

Q: Which, if any, of the following factors are most important for your positive experience with a medical provider?

- A medical provider who explains my condition and treatment clearly: 55%
- A medical provider who listens, understands my needs, and provides emotional support: 52%
- Well-coordinated care and communications between medical providers and their personnel: 35%
- A medical provider who uses digital technologies to optimize my experience: 10%

Source: 2021 Accenture Health and Life Sciences Experience Survey
Did healthcare system access show resilience this past year?

**Key findings:**

Healthcare system access showed resilience over this past year

- 51% said there has been no change in their access to healthcare since the onset of the COVID-19 pandemic
- 26% said their access has improved
- 20% say their access is slightly or much worse
- When people cannot afford the medical care or medications they need, they often delay (39%) or decline (29%) treatment or medication or skip an appointment with a medical provider (30%)
- The reaction to the affordability barrier varies across age groups

**Take away:**

While the healthcare system is accessible for the majority of people, equitable access for all remains a key concern.
Healthcare system access showed resilience

• For most people healthcare access was unchanged or even improved during the pandemic

Q: Overall; has your access to healthcare been better or worse since the onset of the COVID-19 pandemic, or has there been no change?

<table>
<thead>
<tr>
<th>Don’t know</th>
<th>Much worse</th>
<th>Slightly worse</th>
<th>Slightly better</th>
<th>Much better</th>
<th>No change</th>
</tr>
</thead>
<tbody>
<tr>
<td>3%</td>
<td>6%</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>51%</td>
</tr>
</tbody>
</table>
Responses to affordability issues vary across age groups

- Parts of all generations take actions that may negatively impact their health when they cannot afford healthcare
- Gen X is more likely to explore alternatives that impact their treatment

Q. Which, if any, of the following have you ever personally done when you could not afford either medical care or medications? (by age groups/generation)

<table>
<thead>
<tr>
<th>Action</th>
<th>57 - 74 (Baby Boomers)</th>
<th>42 - 56 (Gen X)</th>
<th>25 - 41 (Millennial)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Treated my condition with an over-the-counter medication</td>
<td>27</td>
<td>37</td>
<td>23</td>
</tr>
<tr>
<td>Delayed a treatment and/or medication</td>
<td>23</td>
<td>37</td>
<td>22</td>
</tr>
<tr>
<td>Skipped and appointment with a medical provider</td>
<td>16</td>
<td>29</td>
<td>19</td>
</tr>
</tbody>
</table>

Source: 2021 Accenture Health and Life Sciences Experience Survey
Did distrust across the healthcare ecosystem hinder effective care?

**Key findings:**

Providers have people’s trust (47%), but others in the ecosystem must earn it

- Health insurance companies are trusted by 23%, Pharma companies are trusted by 17%, Technology companies by 15%
- People are more aware of the risks and benefits of sharing data. More than 50% want a right to approve the use of their PHI
- More than 50% made the pandemic consider that their PHI is valuable to the healthcare system
- 30% believe that pharma and healthcare companies collaborate in their best interest

**Take away:**

People’s trust levels need to increase for advancing in medical science and deliver better health outcomes
Healthcare ecosystem players have work to do to build trust

- People trust their healthcare providers to handle their digital health information well, but they are much less trusting when it comes to other ecosystem players.

Q. Overall, how much do you trust each of the following people or organization to keep your digital healthcare information including electronic medical records and other personal information secure? (“Very much” responses)

<table>
<thead>
<tr>
<th>Year</th>
<th>Healthcare providers (%)</th>
<th>Pharmacies (%)</th>
<th>Health insurance companies (%)</th>
<th>Technology companies (%)</th>
<th>My local or national government (%)</th>
<th>Pharmaceutical companies (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>36</td>
<td>32</td>
<td>28</td>
<td>14</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>2019</td>
<td>53</td>
<td>33</td>
<td>29</td>
<td>12</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>2020</td>
<td>49</td>
<td>34</td>
<td>28</td>
<td>13</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>2021</td>
<td>47</td>
<td>33</td>
<td>23</td>
<td>15</td>
<td>18</td>
<td>17</td>
</tr>
</tbody>
</table>

Source: 2021 Accenture Health and Life Sciences Experience Survey
People are more aware of the risks and benefits of sharing data

- People are willing to share, but only for reward, and for specified use
- People become more aware of the value of their personal health information

Q: The increase in virtual care due to the COVID-19 pandemic has made me consider...

...that I should have the right to approve the collection and usage of my personal health information (PHI) for any purpose beyond my treatment

...my data privacy and security needs more

...that my personal health information is valuable to the healthcare system to advance research (i.e. improving drugs and treatments)

Source: 2021 Accenture Health and Life Sciences Experience Survey
People’s views on collaboration and trust in pharmaceutical companies could be better

• Pharmaceutical companies have significantly less trust than healthcare providers
• They can increase trust when they make treatments more affordable and are more transparent
• All healthcare ecosystem players have work to do to build trust

Q: Which, if any, of the following statements apply to you?

- 30% I believe healthcare providers work closely with pharmaceutical companies to inform health recommendations that are my best interest
- 17% I would let pharmaceutical companies manage a chronic illness in collaboration with a medical provider
- 16% I believe pharmaceutical companies market their products in a trustworthy manner
- 15% I trust pharmaceutical companies more than I did before the COVID-19 pandemic

Source: 2021 Accenture Health and Life Sciences Experience Survey
Pharmaceutical companies can increase trust when they make treatments more affordable and transparent

- Pharmaceutical companies enjoy significantly less trust than healthcare providers
- Pharmaceutical companies can increase trust when they make treatments more affordable and are more transparent
- Healthcare ecosystem players have work to do to build trust

Q: Which, if any, of the following would increase your trust in the pharmaceutical industry?

- 41% Reduced medication and treatment costs
- 39% More transparency into pricing
- 34% Clearer communication about medications/treatments effectiveness and their side effects
- 34% More transparency in research and drug development process
Moving digital adoption in healthcare from reaction to revolution

1: While many advances were in reaction to challenges brought forth by the pandemic, there is room to build on these gains

2: Revolutionary ways put people at the center of care
   - Ecosystem needs to embrace tech that improves access, provides emphatic experiences and builds trust

3: Technology solves many issues and needs to become the top choice for access contributing to a positive experience
   - Digital access was not rated important by people or considered among the first options for care

4: The entire ecosystem must cooperate to make healthcare experiences simpler, more coordinated and effective
   - It’s not just on providers to provide positive healthcare experiences

5: The lack of trust remains a massive issue that needs to be tackled as top priority
   - People trust providers most
   - Trust can be built through transparency of pricing, drug development processes, medication side effects, and informed consent in use of PHI
Thank You

Please complete online session evaluation

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