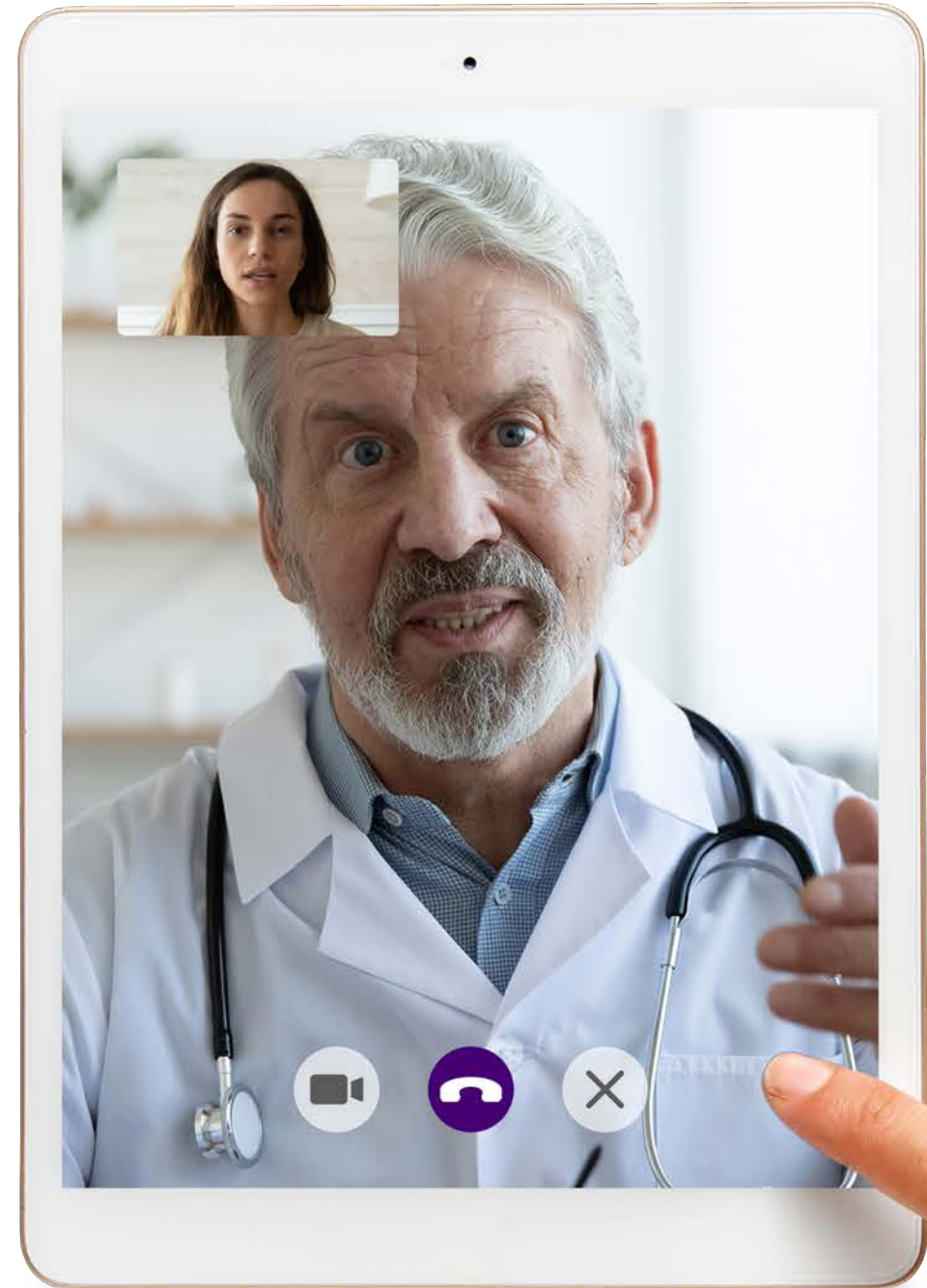




SUSTAINING THE GROWTH OF DIGITAL HEALTH

Re-Examining the Accenture 2020
Digital Health Consumer Survey

FINLAND FINDINGS



Executive summary

Our 2020 Digital Health Consumer Survey shows that while interest in digital healthcare was at 72% in Finland before the COVID-19 pandemic, Finns were still reluctant to use digital tools and services, largely due to concerns about their security and effectiveness. The pandemic has boosted awareness of virtual health significantly. But sustaining interest will hinge on traditional healthcare professionals, deeply trusted by Finnish consumers for every type of care. The development curve would benefit from healthcare organisations putting clinicians on the frontline of digital change, getting more involved in improving digital tools and services and boosting digital access in rural areas and for marginalised groups.

¹ Hyvinvointiala, "Yksityisillä palvelutuottajilla 350 000 lääkärin digivastaanottoa alkuvuonna – tänä vuonna miljoona rikki?", May 12, 2020, <https://www.hyvinvointiala.fi/yksityisilla-palvelutuottajilla-350-000-laakarin-digivastaanottoa-alkuvuonna-tana-vuonna-miljoona-rikki/>

² Telemedicine, "Korona pisti vauhtia telelääketieteen kehittäjiin", April 28, 2020, <https://www.telemedicine.fi/fi/uutiset/korona-pisti-vauhtia-telelaaketieteen-kehittajiin>

³ HIMSS, "COVID-19: Lessons from the Nordics", May 12, 2020, <https://www.healthcareitnews.com/news/europe/covid-19-lessons-nordics> and Kanta, "Kanta-palvelut kansan ja ammattilaisten suosiossa – tältä näytti vuosi 2019", January 30, 2020, https://www.kanta.fi/fi/tiedote/_/asset_publisher/cf6QCnduV1x6/content/kanta-palvelut-kansan-ja-ammattilaisten-suosiossa-talta-naytti-vuosi-2019

Digital use remains steady

The Accenture 2020 Digital Health Consumer Survey confirms that although interest in digital health had stalled somewhat immediately pre pandemic, more Finns than ever were considering using virtual services: 72% vs 67% a year earlier. The proportion of Finnish consumers using mobile devices and apps from traditional medical care providers to help manage their health had remained steady since 2018, at 43%, and the use of wearable technologies had actually dropped (from 13% to 11%). Even so, Finns were significantly more likely than consumers in other countries surveyed to say they would be comfortable interacting with a chatbot, computer or digital device for health or medical purposes (63% vs a global average of 50%). And COVID-19 sent interest in digital soaring. Virtual consultations increased 20-fold,¹ many doctors moved their activities online,² and the national electronic health record managed by Kanta Services garnered more than one million users per month, significantly strengthening Finland's response to the crisis.³

Our analysis focused on patient behaviours regarding:



Virtual healthcare

This includes services and support needed for wellness, diagnosis and treatment, regardless of a patient's location. The provider and patient are in different locations, with support and care provided through video, mobile device apps, secure email, text/SMS messaging or online social platforms.



Digital healthcare

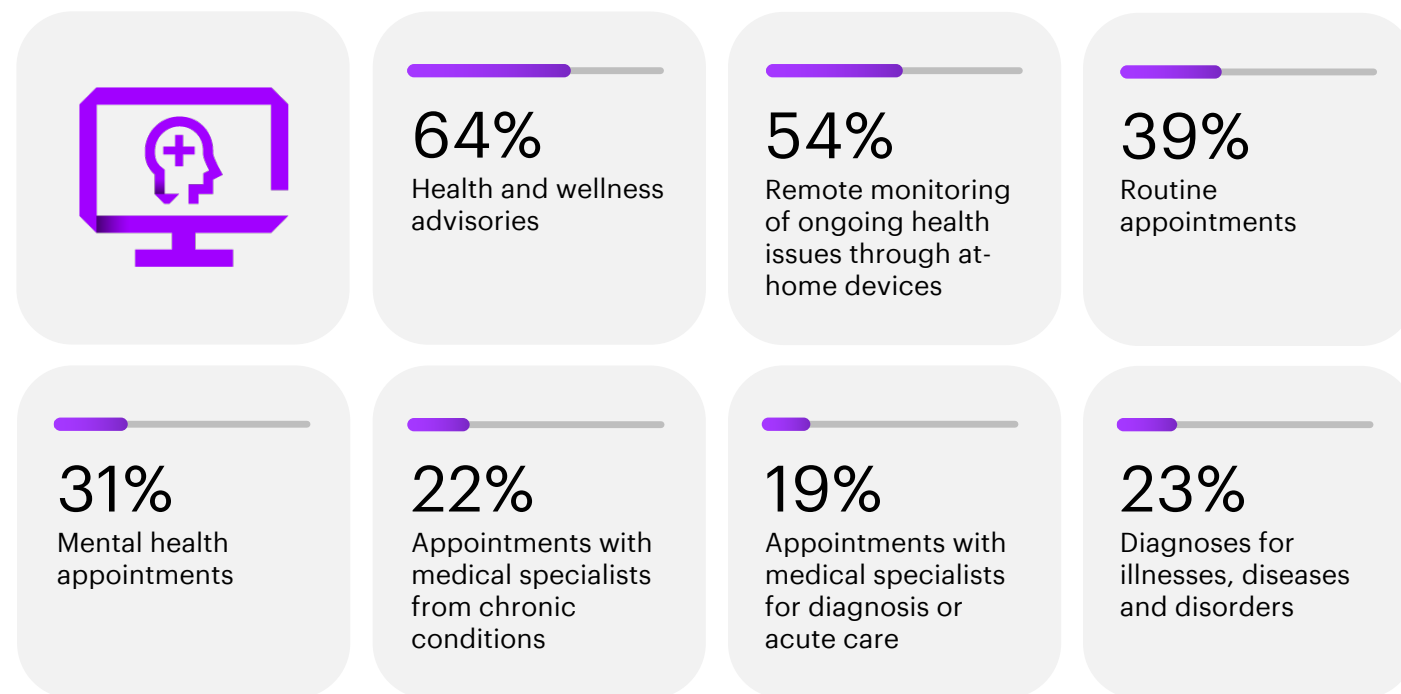
Which includes tools and technologies such as electronic health/medical records, mobile solutions, wearables that track fitness, lifestyle and vital signs, smart scales and chatbots.

Beyond the urgency that drove adoption during the pandemic, consumers want virtual care services

If given the choice, many healthcare consumers would choose virtual channels for basic care services, and even for specialty care. They “definitely” or “probably” would receive health and wellness advisories (64%), remote monitoring of ongoing health issues through at-home devices (54%) and nearly two-fifth (39%) would choose virtual for routine appointments.

One fifth are open to receiving diagnoses virtually—23% for illnesses, diseases and disorders, and 19% for appointments with medical specialists for diagnosis or acute care.

Figure 1. Consumers are open to virtual care—from basic to specialty services



Q: Which of the following would you do virtually if given the choice? “Definitely” and “Probably would do virtually”

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

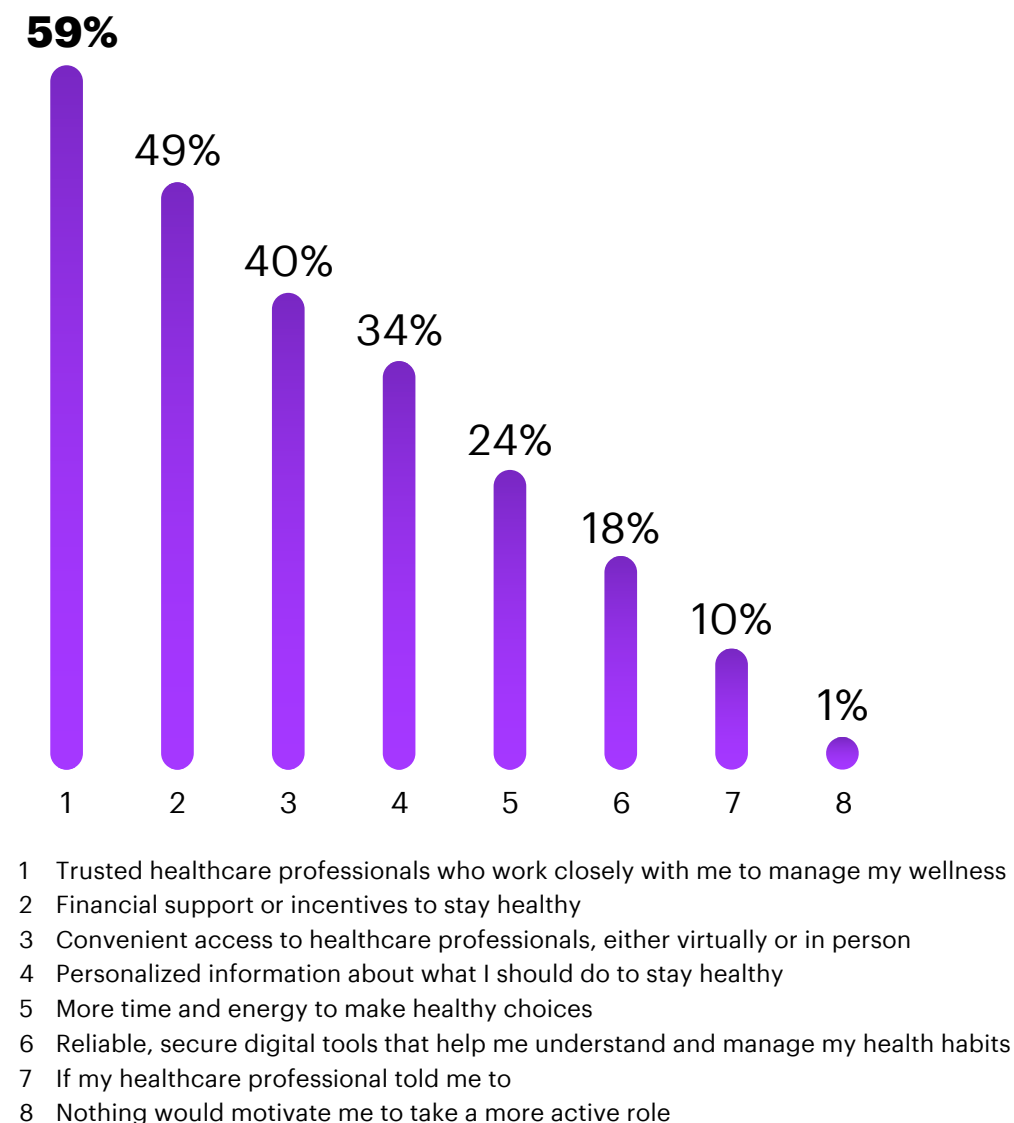
Getting doctors to sustainably buy into digital health could have a big impact on adoption

Before necessity drove a surge in virtual services, less than one-fifth of healthcare consumers surveyed (18%) said reliable and secure digital tools that help them to understand their health habits would motivate them to take a more active role in managing their health.

Physicians and other clinical practitioners can help maintain the crisis-era momentum as consumers look to them for motivation. Convenient access to healthcare professionals (virtually or in person) was ranked highest among factors that would motivate consumers to take a more active role in managing their health, cited by 59% of respondents.



Figure 2: Trusted care providers motivate consumers to manage their health



- 1 Trusted healthcare professionals who work closely with me to manage my wellness
- 2 Financial support or incentives to stay healthy
- 3 Convenient access to healthcare professionals, either virtually or in person
- 4 Personalized information about what I should do to stay healthy
- 5 More time and energy to make healthy choices
- 6 Reliable, secure digital tools that help me understand and manage my health habits
- 7 If my healthcare professional told me to
- 8 Nothing would motivate me to take a more active role

Q: Which the following would most motivate you to take a more active role in managing your health?

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

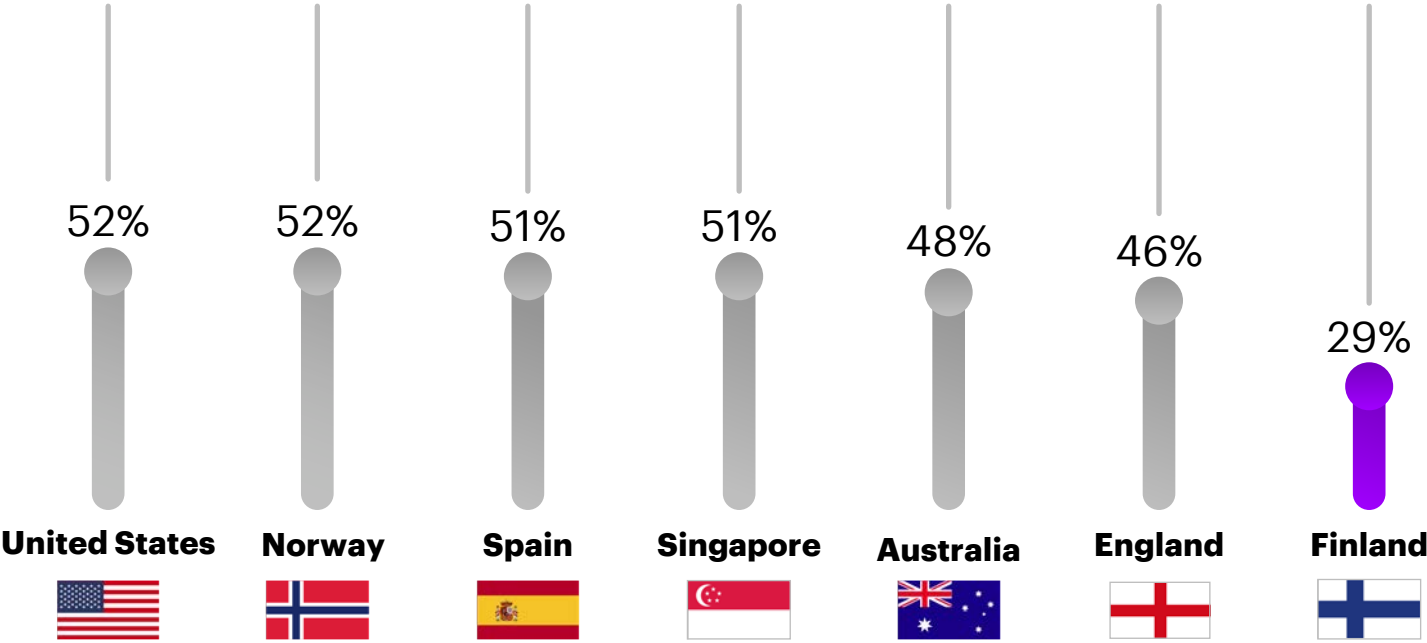
Concerns around privacy and security

Despite Finland’s relatively advanced pre-pandemic digital agenda, both doctors and their patients were hesitant to use digital tools and services. While almost half (49%) of survey respondents said trusted healthcare professionals would motivate them to take a more active role in managing their health, only 19% said their regular healthcare provider had recommended digital tools for this purpose—and data privacy and security seem to have played a key role.

Figure 3. Trust around the world: Physicians supported by AI

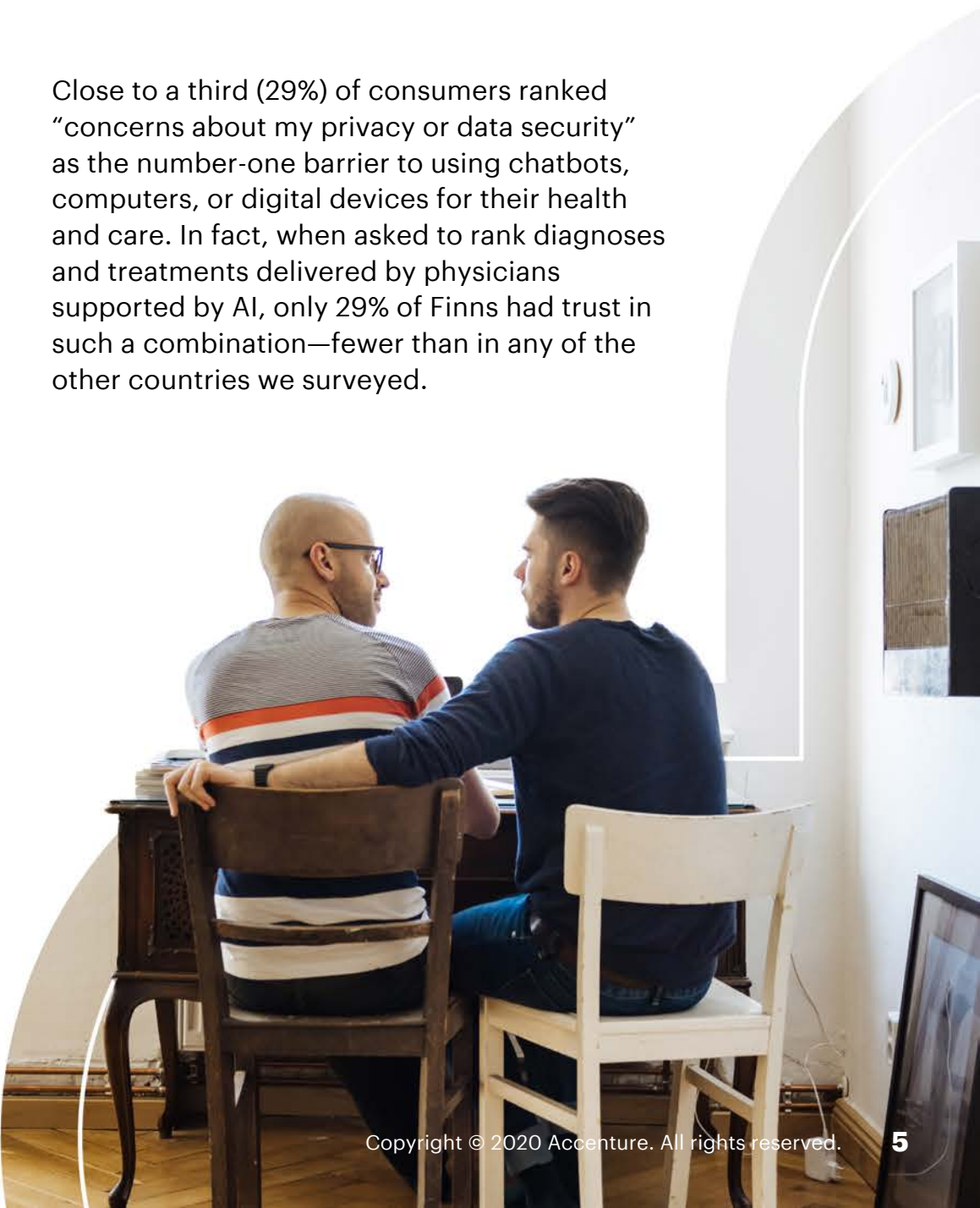
“Strongly” and “Moderately trust” responses

Diagnosis or treatments determined by a physician supported by an intelligent machine/AI



Q: To what extent do you trust the following?
2020 survey data is from November to December of 2019 and reflects patient attitudes prior to the global spread of COVID-19.

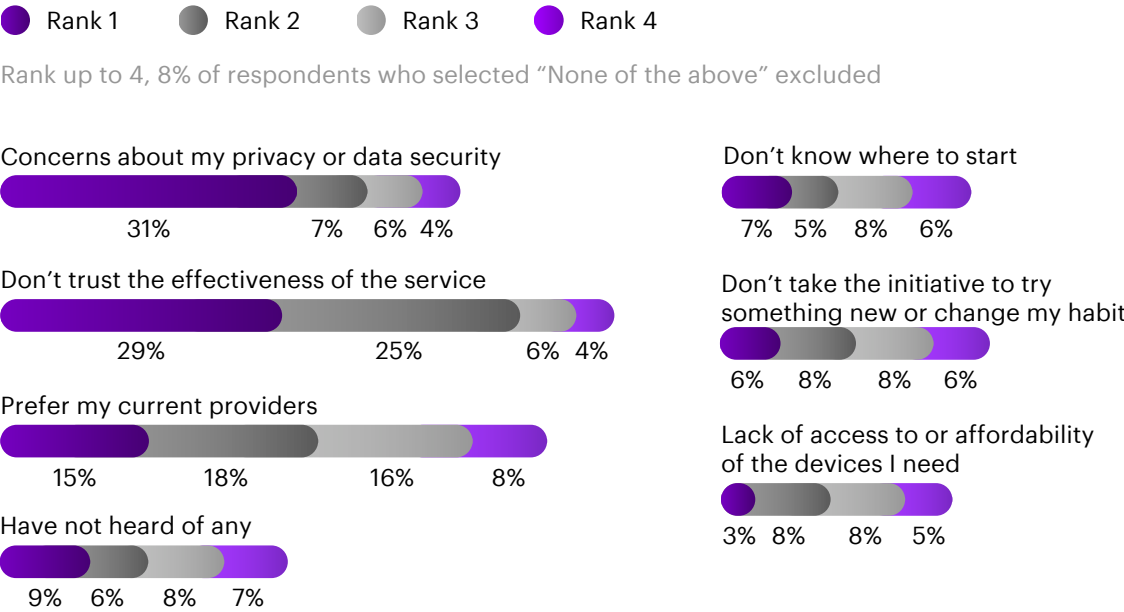
Close to a third (29%) of consumers ranked “concerns about my privacy or data security” as the number-one barrier to using chatbots, computers, or digital devices for their health and care. In fact, when asked to rank diagnoses and treatments delivered by physicians supported by AI, only 29% of Finns had trust in such a combination—fewer than in any of the other countries we surveyed.



Addressing the technology maturity curve

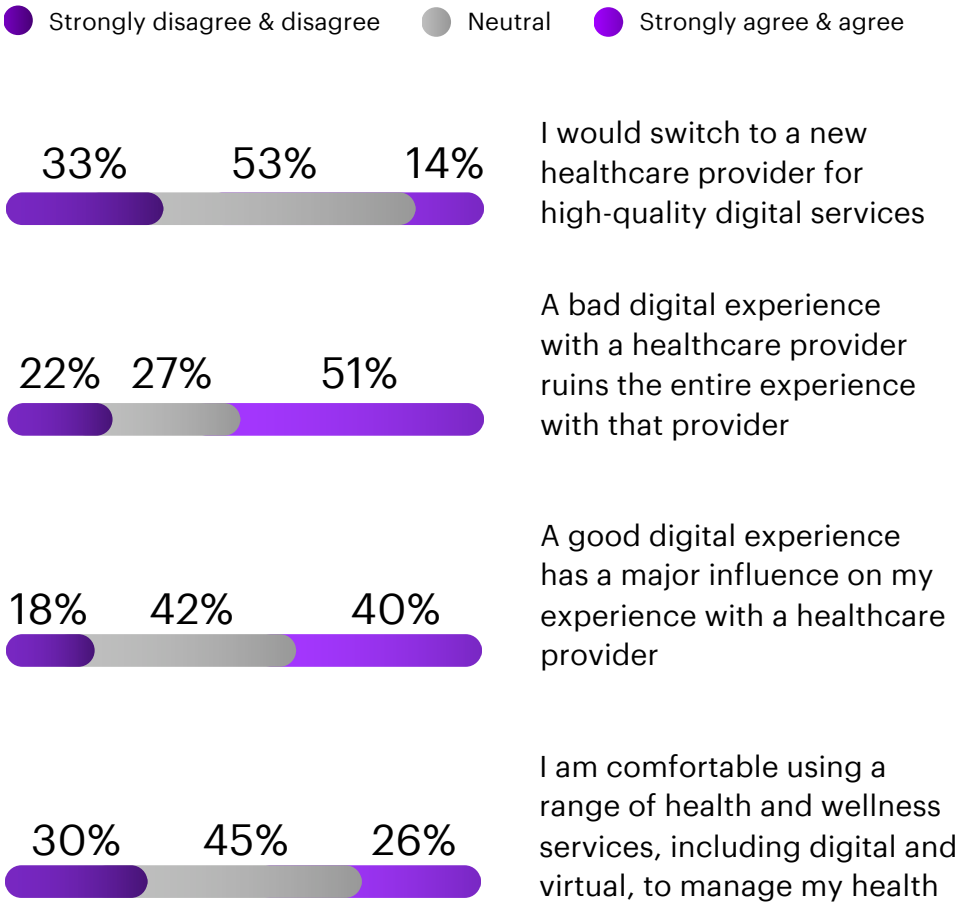
Our survey revealed limited consumer confidence in the effectiveness of digital tools, with 48% of Finnish consumers overall ranking a lack of trust in service effectiveness as a top-three reason to avoid chatbots and other virtual services.

Figure 4. Lack of trust in data privacy stalls chatbot growth



Pre-pandemic, just over half of survey respondents agreed that a bad digital experience with a healthcare provider ruins the entire experience with that provider—while 40% believed a good digital interaction had a major influence on the patient experience, and 14% were even willing to switch to a new provider for high-quality digital services.

Figure 5: Lacklustre digital options can taint the overall experience



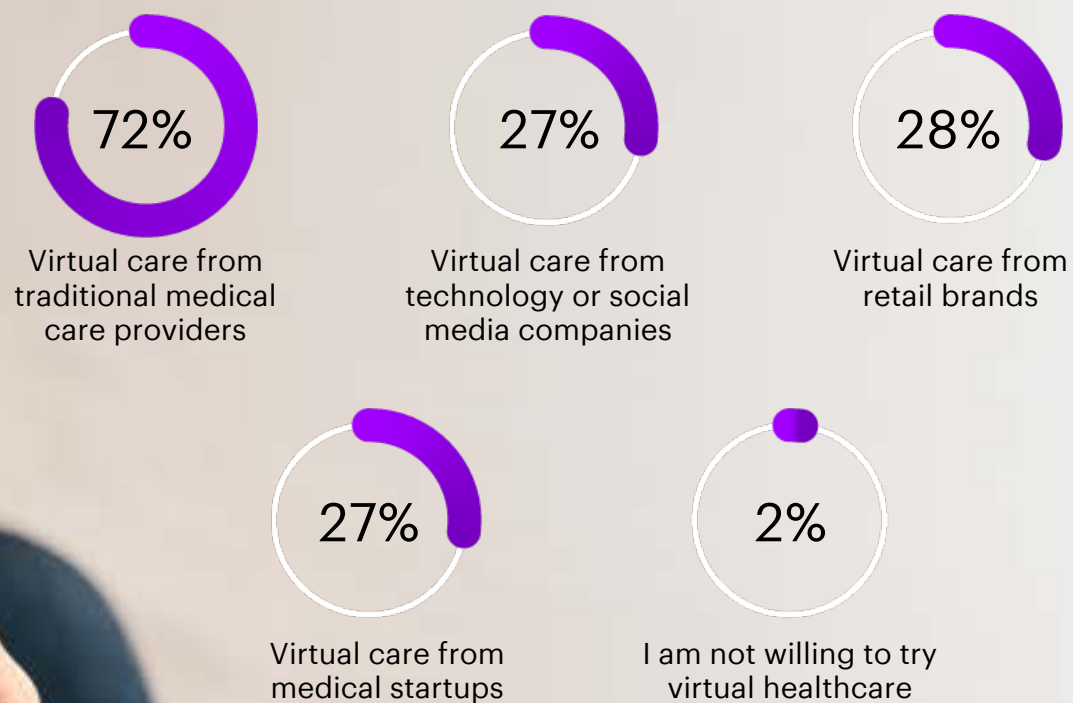
Q: What might keep you from using chatbots, computers or digital devices for your health questions and care?

Q: To what extent do you agree with the following statements?

Consumers are willing to receive virtual care from a variety of sources

While higher numbers of healthcare consumers are open to receiving virtual healthcare services from their traditional providers (72%), over a quarter are also willing to receive virtual care from technology or social media companies such as Google and Microsoft (27%), retail brands (28%), and medical startups (27%).

Figure 6. Consumers are much more willing to receive virtual services from traditional providers



Q: Would you be willing to receive any of the following kinds of virtual healthcare?
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

How to sustain digital health going forward

The leap to digital health requires a push from the medical professionals. Ensuring that privacy and security expectations are met will be a key consideration.

At 76%, Finnish consumers' trust in medical doctors is exceptionally high. What's more, medical doctors are still preferred by a wide margin over digital tools for every type of care, including routine appointments (63% vs 10%).

Finnish survey respondents ranked hospitals (86%), labs that process their medical tests (83%), and doctors (81%) as most trusted to keep their digital healthcare information secure. While 60% of Finns would recommend their nurses based on effectiveness of diagnosis and treatment, only 37% said the same for the digital devices and services they have used. Getting more doctors to champion digital health could have a big impact on continued adoption.

Figure 7. Medical doctors still preferred for every type of care

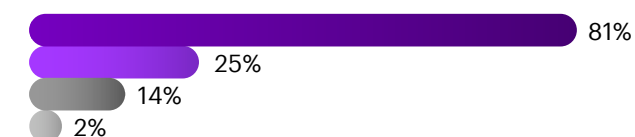
● Medical doctor ● Nurse practitioners, nurses, and/or physician's assistants
● A chatbot, computer, or digital device that interacts via speech or text ● None of the above/not applicable

Select all that apply

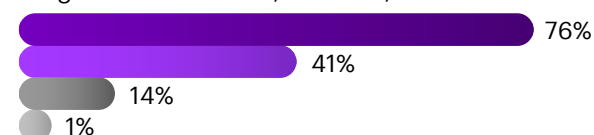
Appointments with medical specialists for diagnosis or acute care



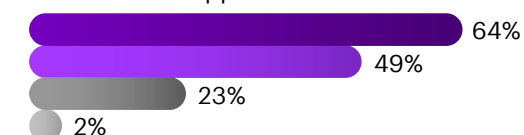
Appointments with medical specialists for chronic conditions



Diagnosis for illnesses, diseases, and disorders



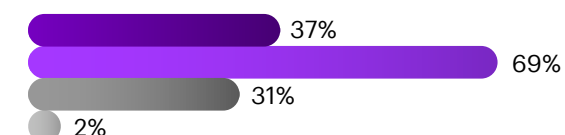
Mental health appointments



Routine appointments



Health and wellness advisors



Q: Which services would you seek out with the following healthcare providers?

2020 survey data is from November to December of 2019 and reflects patient attitudes prior to the global spread of COVID-19.

Recommendations: Security and access are paramount

CONSUMERS NEED HIGH-PERFORMANCE TOOLS THAT DO MORE THAN TODAY'S TECHNOLOGY

Given the levels of trust they enjoy, traditional providers are plainly in pole position to help develop and open access to reliable and secure digital health tools. Indeed, without their active support digital services face an uphill struggle. The good news is that many Finns have used at least one digital tool to manage their health in the past year—they are ahead of other countries in the use of electronic health records—and can identify at least one benefit from the tools they use. Yet many health organizations still have work to do to integrate digital technology into treatment plans. Specifically, they need to:

1

Align digital with established clinical practice. Digital and virtual health solutions can—and should—be integrated with traditional processes, business models and workflows—helping ease the way healthcare is delivered and adding value to the patient experience. For this to happen, the design of clinical pathways needs to be in focus and revisited. Healthcare providers can put in place systems that allow doctors to recommend digital services to patients and collect and interpret patient data from these services.

2

Make access top of mind. COVID-19 made digital health a clinical day-to-day reality, and many more providers became comfortable with digital tools. Organizations should now review data insights to analyse what worked and what didn't, paying particular attention to digital access, which varies widely in Finland. Integrating digital access into clinical pathways would greatly enhance the accessibility and quality of healthcare services, especially in remote areas and among more marginalized groups.

3

Ensure data privacy and security. Privacy and data security are the foundations of digital healthcare, and the pressure for new care channels must not compromise this. Our survey shows just how sensitive Finnish consumers are about their healthcare data. Transparency will help build awareness about how data is collected and what it's used for. Once consumers understand that their data is helping improve healthcare (e.g. in research) and that their privacy is paramount, trust in digital health will grow.



Typing...

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Doctors crucial for adoption

As consumers look to them for motivation, traditional providers will be key to making digital services more effective in the healthcare of all Finns, but not at the expense of information security, because...

“As consumers in Finland count on doctors and nurses, they will also be the **key to making digital services more familiar** to Finns and ultimately more effective in the healthcare of all Finns. The organisations must not only acquire digital capabilities but **provide healthcare professionals continuous support** and **training in transition to digital**; this is a system change with potential for great long-term gains, and hence requires holistic focus.”

“Digital healthcare does not just solve the accessibility to healthcare, but it will **redeem the expectations of more personal and anticipatory/preventive healthcare**. A good example is diabetes, which creates € 3 billion annual costs in Finland. If the potential of the digitalisation would be utilised comprehensively in healthcare, a saving of € 670 million annually is estimated through anticipatory treatments.”

MARKO RAUHALA, MANAGING DIRECTOR, HEALTH AND PUBLIC SERVICE, ACCENTURE FINLAND

Source: <https://www.apotti.fi/kiinnostaako-3-miljardia-vuodessa/>



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Marko leads Accenture Finland’s Health and Public Service practise which partners with leading government and healthcare (private and public) organisations to innovate and deliver digital solutions to provide better citizen experience, increase efficiency and deliver better outcomes for citizens and patients

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@AccentureHealth

With thanks to our research partners, Oxford Economics, especially lead researchers Edward Cone, Adrianna Gregory and Sundus Alfi.

Our 2020 Consumer Research on Digital Health

Accenture commissioned a seven-country survey of 7,804 consumers aged 18+ to assess their attitudes toward technology adoption, wellness management and their changing relationship with providers. It is the latest in a series of annual health technology surveys tracking the perspectives of consumers, with a particular focus this year on the shifting needs and desires of consumers and how they align with the trends that are redefining services provided by healthcare systems. The online survey included consumers across seven countries: Australia (1,000), England (1,002), Finland (800), Norway (800), Singapore (900), Spain (1,000) and the United States (2,302).

The survey was conducted by Oxford Economics on behalf of Accenture between November and December 2019. Where relevant, the survey uses select findings from the [Accenture 2019 Digital Health Consumer Survey](#), the [Accenture 2018 Consumer Survey on Digital Health](#), the [Accenture 2017 Consumer Survey on Healthcare Cybersecurity and Digital Trust](#) and the [Accenture 2016 Patient Engagement Survey](#).

For providing insights into consumers behaviour changes during COVID-19 crises, Oxford Economics conducted desk research, leveraging public media and official government sources. Insights were compared against the initial survey findings to understand temporary forced versus long term voluntary digital health adoption chances.

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About Oxford Economics

Oxford Economics is a leader in global forecasting, quantitative analysis, and thought leadership. Our worldwide client base comprises more than 1,500 international corporations, financial institutions, government organisations, and universities. Headquartered in Oxford, with offices around the world, we employ 400 staff, including 250 economists and analysts. Our best-in-class global economic and industry models and analytical tools give us an unmatched ability to forecast external market trends and assess their economic, social and business impact.

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