



SUSTAINING THE GROWTH OF DIGITAL HEALTH

Re-Examining the Accenture 2020
Digital Health Consumer Survey

SINGAPORE FINDINGS



Executive summary

The COVID-19 pandemic greatly accelerated the adoption of digital healthcare. With most in-person visits on hold, use of remote services exploded during the crisis. At the same time, the collection and analysis of personal data—an essential element of digital health—has become a defining theme of the COVID-19 era.

While many face-to-face encounters will resume when possible, there is a unique opportunity to permanently expand the use of virtual services. What steps can providers, payers, and consumers take to maintain the momentum created by forced adoption and address the issues that have previously inhibited the growth of digital health?

How can recent gains in digital healthcare driven by COVID-19 be made permanent? Some factors—like the extension of government subsidies to cover video consultations—are beyond the direct control of providers and consumers. Others, like the development of secure and reliable digital tools for contact tracing, will require an ongoing cooperative effort.

But some challenges from the pre-crisis era can be addressed more directly. These include security and privacy concerns—often overlooked out of necessity during the pandemic. They remain an evergreen issue, especially as non-medical players take bigger roles in healthcare. Physicians and other professionals must work to increase trust in virtual services as they incorporate new tools into their business and care models. Finally, for consumer adoption of virtual care to achieve sustainable growth, technology—and access to it—must continue to improve.

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.



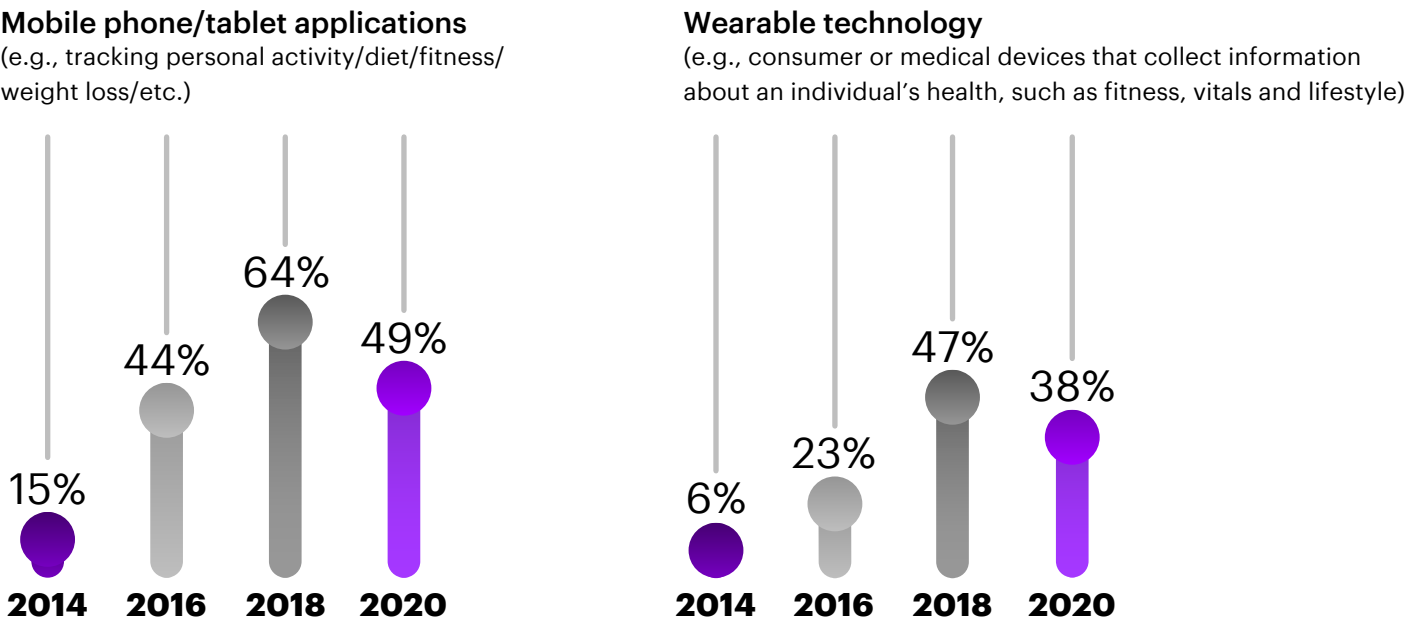
Digital healthcare

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.

Before COVID-19, growth in Singaporeans' digital health adoption had stalled

Despite having the most technologically savvy consumers among the countries surveyed. Consumers' use of digital tools to manage their health began declining in Singapore before the pandemic. In fact, almost one-fifth of consumers surveyed in Singapore (19%) were not using any digital tools to manage their health. Use of mobile devices and applications fell from nearly two-thirds (64%) using these tools in 2018 to 49% in early 2020. Use of wearable technology—for instance, devices that collect health data such as fitness and vitals—has decreased from 47% in 2018 to just 38% in 2020.

Figure 1. Fewer Singaporeans were using digital tools to manage their health



Q: Which of the following technology or electronic health management tools have you used to manage your health in the past year?
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

COVID-19 HAS FORCED A SURGE

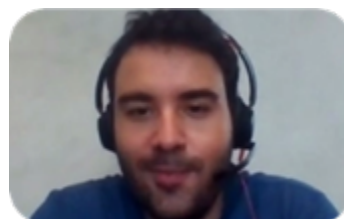
Virtual healthcare services became a necessity for many Singaporeans during the COVID-19 pandemic, as efforts to slow transmission of the virus sharply limited face-to-face visits with doctors and other professionals.

After years of incremental growth, many consumers were already considering remote care before the coronavirus. While just 17% of Singapore consumers in our latest survey, which concluded just before the pandemic swept across the country, had already received healthcare virtually, 55% were willing to receive virtual healthcare from traditional medical care providers.

However, the forced adoption of telemedicine and other services—facilitated by an extension of patient subsidies (e.g., MediSave) to cover telemedicine consultations—introduced a vast new user base to the virtual experience.

Starting in April, medical savings schemes such as the Community Health Assist Scheme (CHAS) and MediSave were temporarily extended to cover the costs of video consultations for seven chronic conditions.¹ In order to provide video consultations, doctors are required to undergo telemedicine training.²

This is a change of historic proportions, and it gives healthcare providers and insurers an unprecedented chance to permanently shift the default care model to virtual services for many medical needs.



70% increase

in the number of video consultations delivered on Doctor Anywhere, from the beginning of the outbreak to mid-February.⁴

41% increase

in sign-ups to use video consultation services offered by Doctor Anywhere from January to March 2020.⁶

25% weekly increase

in usage of WhiteCoat, a Singapore-based telemedicine provider, since the outbreak started.⁷



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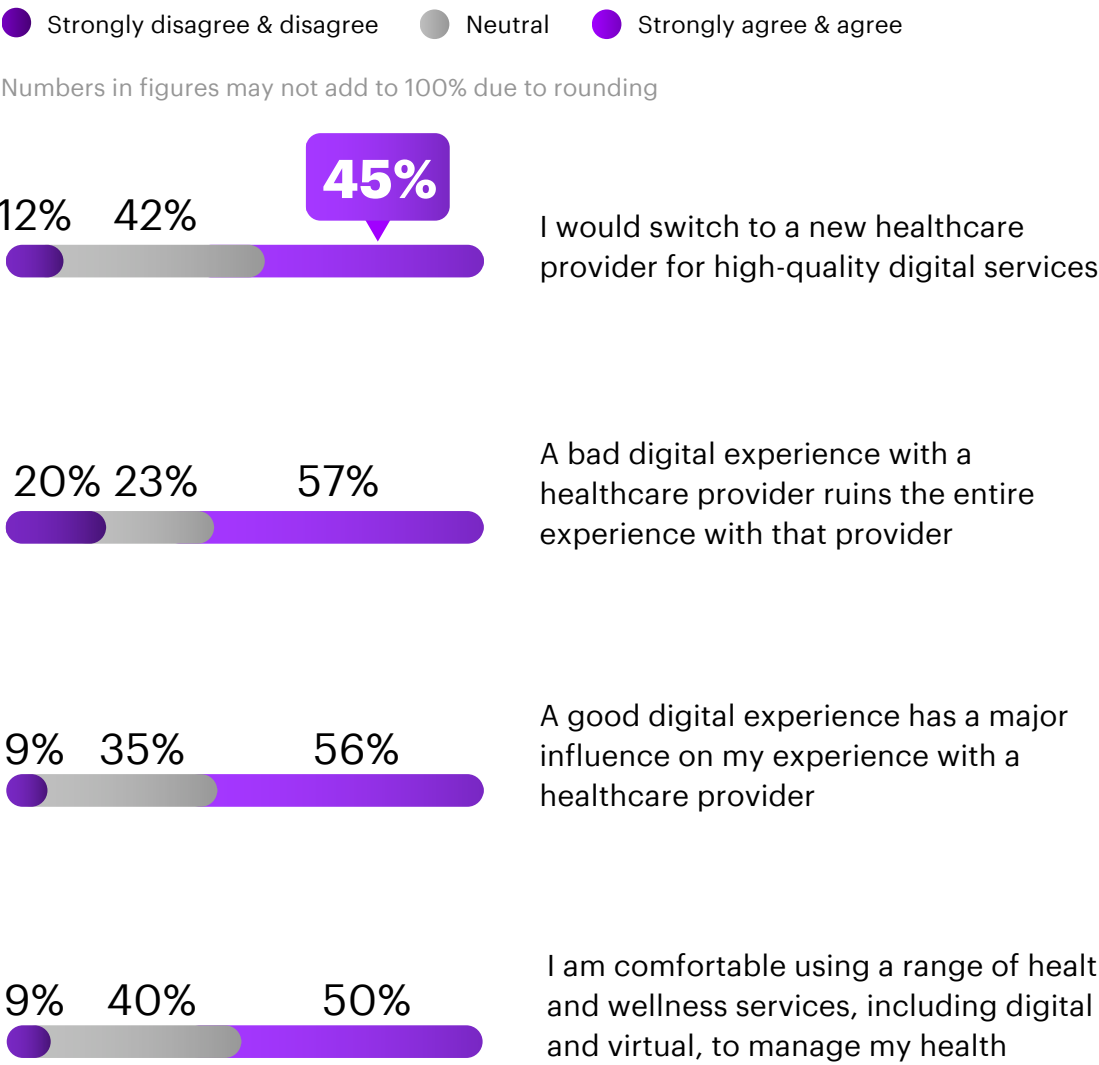
What could drive and stall post-pandemic progress

Barriers to adoption, though, still ring true. Even as consumers gain confidence in digital tools and services post-pandemic, there is still work to be done to meet expectations for superior digital services. Amid the pandemic, consumers with nowhere else to turn were forced to lower their expectations for the quality of digital health experiences. But as things normalise, we believe that consumers will revert to prior expectations.

Before COVID-19, high-quality digital services mattered to consumers in Singapore—far more than others in our survey. Nearly half of respondents were willing to switch to a new provider for high-quality digital services, and 57% agreed that a bad digital experience with a healthcare provider ruins the entire experience with that provider.

Singapore consumers are even comfortable using a range of health and wellness services, digital and virtual, to manage their health (50% Singapore, vs. 36% others).

Figure 2. Lackluster digital options can taint the overall patient experience



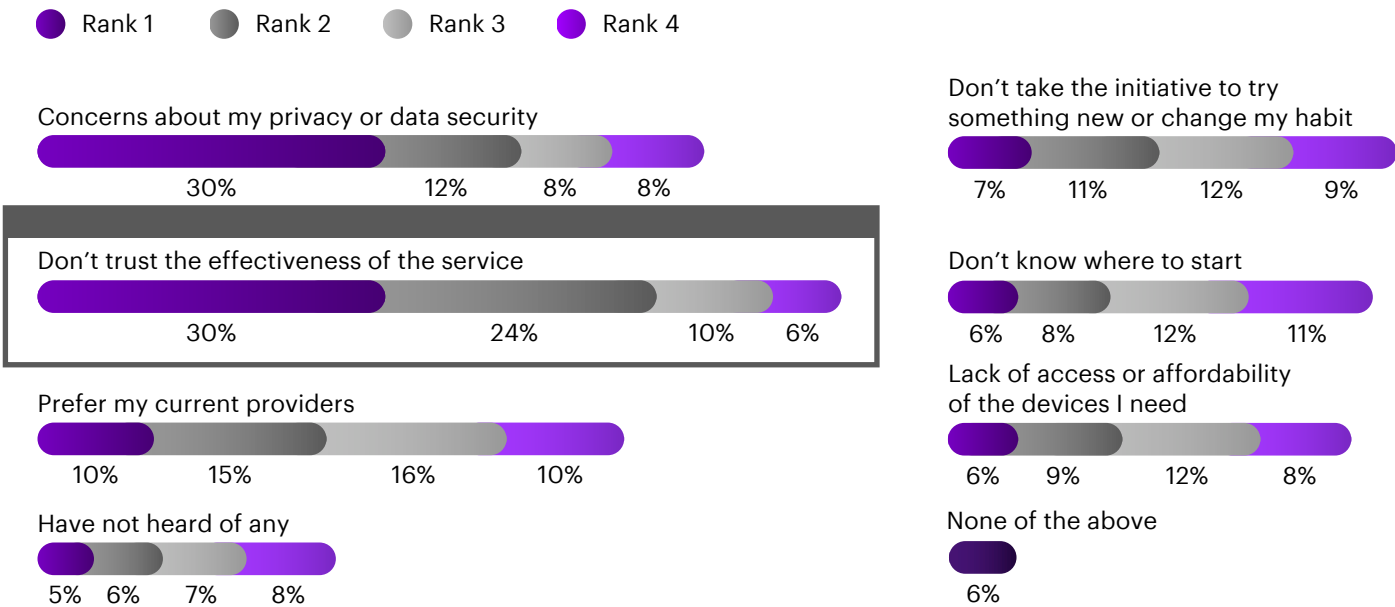
Q: To what extent do you agree with the following statements?

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

Consumers question the privacy, security and effectiveness of digital tools

Technology has been a critical element of the response to COVID-19. Chatbots, for example, emerged during the crisis as an important way of managing demand for information about symptoms, treatment, and scheduling. Yet our survey showed limited consumer confidence in chatbots and other digital tools. Most respondents (64%) ranked “don’t trust the effectiveness of the service” as a top-three reason keeping them from using chatbots, computers or digital devices for health questions and care. And while 67% of respondents would recommend their medical doctors based on effectiveness of diagnosis and treatment, only 45% say the same for digital devices and services they have used.

Figure 3. Many consumers doubt the effectiveness of digital tools and services



Q: What might keep you from using chatbots, computers or digital devices for your health questions and care?
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

90%

of infected residents have logged their symptoms and vitals on the SGDormBot platform daily, leading to nearly 100 remote consultations.²⁰

Six

migrant worker dormitories are using SGDormBot, an AI-powered chatbot that sends daily reminders to infected residents to monitor and self-report their vitals on the platform.²⁰

Chatbot tools

The Singapore government has released or optimised several chatbots to provide COVID-19 updates and address questions. These include Ask Jamie, Covid-19 Chat For Biz, and Gov.sg Whatsapp.^{21, 22}

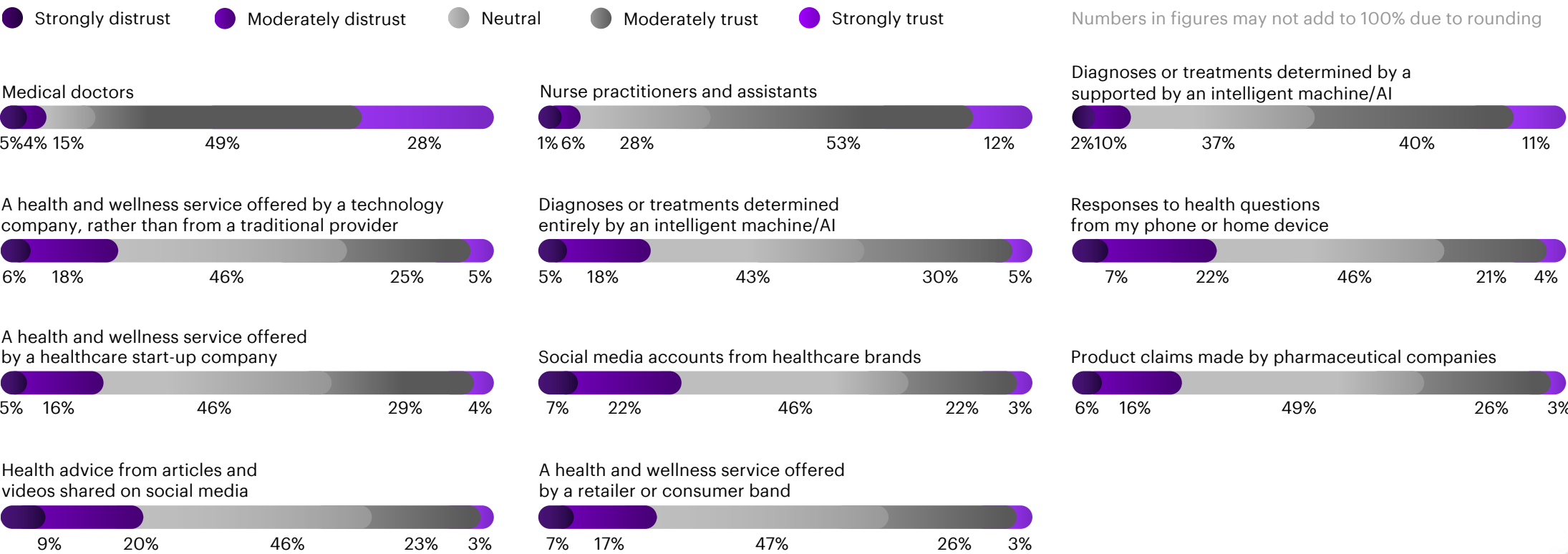


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People trust traditional care providers much more than new entrants

Consumer trust in physicians and other established practitioners greatly outweighs trust in non-traditional providers. Less than one-third of our survey respondents trust health services offered by healthcare startup companies (33%), technology companies (30%), and retail or consumer brands (29%)—all of which can play a critical role in the expansion of virtual health after COVID-19, provided they gain consumer acceptance. While standards applied by consumers to their providers may have relaxed somewhat as the threat of illness limited options for consultation, those standards likely will regain relevance after the crisis has abated.

Figure 4. Consumers trust clinicians (doctors, nurses and assistants) most



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

Designing services that matter for consumers and fit in clinicians' day-to-day practice

RECOMMENDATIONS FOR HEALTHCARE ORGANISATIONS

1

Design services that matter. Solutions should digitise information that is relevant and valuable to both care providers and consumers. Care providers can then act on insights that matter to improve people's health. [Human-centred design](#) will help with developing services that have a deep understanding of user needs and wants. Health insurers and care providers can co-create and explore concepts with consumers to improve service design, and then [test concepts](#) to ensure they are technologically feasible and business viable.

2

Fit services into clinical practice. COVID-19 forced digital health to fit into the clinical day-to-day. [More care providers gained](#) comfort with digital. Health insurers and care providers should review data insights to analyse what worked and what didn't and adjust digital services accordingly. Care providers, especially doctors, do not want to spend precious time that they could be applying in other areas that add value to the patient experience. Digital and virtual health solutions can be part of processes, business models and workflows—fitting inside the way healthcare is delivered. Healthcare organisations can put in place systems that allow care providers to recommend digital services to patients and collect and interpret patient data from these services.

3

Keep accessibility in mind. Healthcare organisations must account for cultural and socio-demographic variances. This means understanding wide variations in buying power, health literacy and digital competence—and access to broadband—and working to [close those gaps](#).



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SINGAPOREANS' CONCERNS ABOUT DATA SECURITY AND PRIVACY HAVE INCREASED IN RECENT YEARS

When consumers lack trust in how their data is being used, they may be less likely to use digital services. Security and privacy concerns have increased in recent years as healthcare consumers are not confident their data is being protected and used properly. Trust in technology companies has declined significantly, likely due to the proliferation of high-profile stories about data breaches, yet many younger consumers will still trust these companies to deliver health and wellness services. While consumers trust their doctors more than anyone else, there is substantial trust in care providers such as nurses, nurse practitioners and doctors' assistants.



ADDRESSING FAMILIAR CHALLENGES: PRIVACY AND SECURITY

Old concerns will resurface as forced adoption gives way to consumer choice

Worries about the safety of virtual care were a big problem for consumers long before the pandemic. Respondents to our survey said privacy and data security was a top concern keeping them from using chatbots, computers, or digital devices for information and care. Many were not confident that their digital healthcare data was being used responsibly and in their best interest.

The necessities of social distancing outweighed these issues when other options for medical consultation were unavailable, but privacy and security fears hardly disappeared in the coronavirus era.

In part due to data and privacy concerns, the Singapore government's contact tracing app TraceTogether was only downloaded by roughly one-quarter of the population. In response to the low uptake and security concerns, the government is distributing a wearable device called a TraceTogether Token that does not use GPS, an internet connection, or a cellular connection. To further ease concerns, the government emphasized that data collected from contact tracing is protected under public sector data protection laws.^{10, 11}

As the crisis eases, concerns about privacy and security must continue to be addressed if forced adoption is to yield sustainable increases in the use of virtual healthcare services.



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Consumer trust must be earned by new entrants

Singaporeans trust their traditional healthcare providers, and that trust extends to data security. When asked “How much do you trust each of the following organisations or people to keep your digital healthcare information secure?” our survey respondents ranked hospitals (85%), doctors (81%), labs (78%), and urgent care or walk-in retail clinics (73%) as most trusted.

Trust is much lower for technology companies: just 44% trust these new entrants. Globally, the reputation of major consumer technology firms has suffered in the past few years, which may be reflected in our statistics.

Figure 5. Trust in keeping digital healthcare information secure drops significantly for tech companies and government

85%

Hospitals
I visit



81%

My doctor(s)
or other
healthcare
providers



78%

Labs that
process my
medical
tests



73%

Urgent care or
walk-in retail
clinics I visit



71%

Government



68%

My health
insurance
company



67%

My pharmacy



48%

Non-medical
staff at my
doctor's or
healthcare
provider's office



44%

Tech
companies



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

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

Across generations, consumers of Singapore trust tech companies

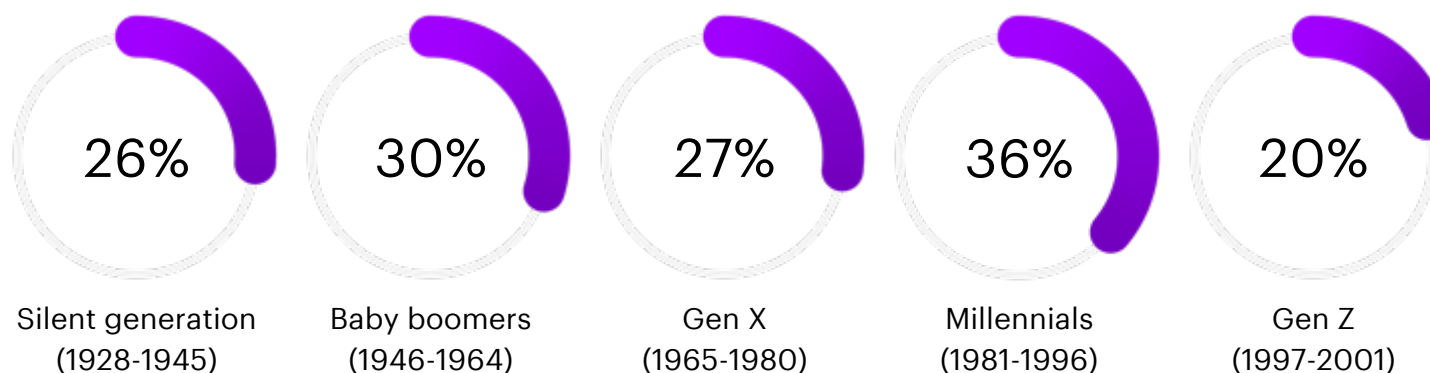
While trust in technology companies' security measures has declined overall, consumer in Singapore still trust their services. Nearly one-fourth of Gen X (27%), 20% of Gen Z and 36% of millennials trust tech companies for health and wellness services, compared to 30% of baby boomers and 26% of the silent generation. Singaporeans also have the highest overall trust in technology companies, with 30% consumers trusting them, followed by Spain at 29%.



Highest overall trust

on tech companies with 30% consumers trusting Tech Companies, followed by Spain at 29%.

Figure 6. Millennials trust health and wellness services offered by a tech company (rather than a traditional provider) more than other generations



Q: To what extent do you trust the following? "Strongly" and "Moderately trust" responses. Silent generation n=255; Baby boomers n=860; Gen X n=475; Millennials n=597; Gen Z n=115

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

A critical question: Is this device safe?

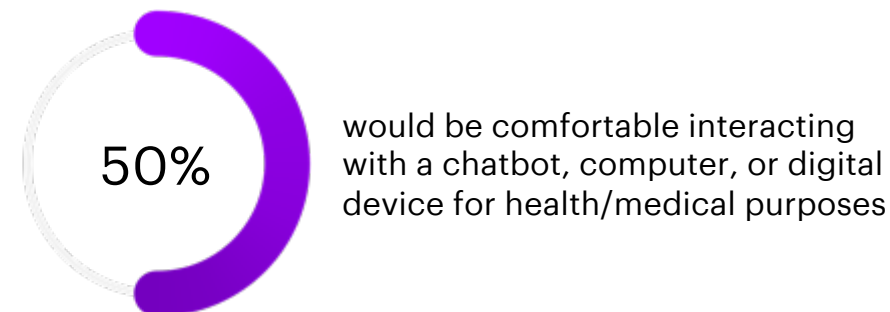
Consumers have mixed feelings about sharing their health data via digital devices. Concern over data privacy and security was one of the top barriers to the adoption of chatbots, computers, or digital devices chosen by respondents to our survey.

These issues reflect a broader discomfort with digital devices and data sharing. While half of Singaporeans said they would be comfortable visiting or interacting with a chatbot, computer, or digital device for health or medical purposes, nearly one-third (30%) said privacy and data security concerns were the number-one barrier to using these devices for their health questions and care.

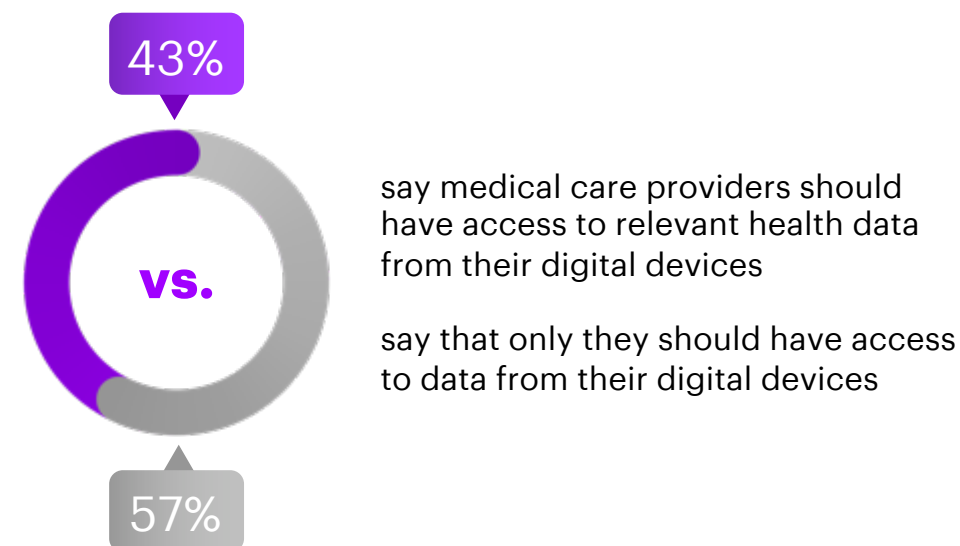
30%

of Singaporean respondents ranked “concerns about my privacy or data security” as the number-one barrier to using **chatbots, computers, or digital devices** for their health questions and care

Figure 7. Consumers have limited confidence in digital devices



Q: Which would you be comfortable visiting or interacting with for health/medical purposes?



Q: Choose the statement that best describes how you feel. Respondents were asked to choose between two opposing statements.

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

Building confidence in virtual health by making privacy and security top priorities

RECOMMENDATIONS FOR HEALTHCARE ORGANISATIONS

1

Prioritise security and privacy. Healthcare data is highly sensitive, and organisations should do whatever they can to protect it. Established medical practitioners and new entrants in the healthcare market [can build confidence](#) for patients engaging with the virtual healthcare system, post COVID-19, by making security and privacy top priorities. In practical terms, that means healthcare organisations must create strong data security not only in policy, but also practically demonstrate to consumers how their data is secured and build trust. While executive leadership is important, having highly respected clinicians as "ambassadors" and "spokespeople" for privacy and security will have a greater impact as they tend to be trusted more.

2

Be transparent. Healthcare organisations can be clear and transparent to consumers about how data is collected and used. And they can build confidence in devices by establishing the trustworthiness of a device before granting it access to network resources. Trust deepens once consumers see how care providers [ensure strong data security for ongoing operations as well](#). Ecosystem participants bring unique strengths and talents and can work together to shape stronger digital solutions.

3

Choose a top leader. Identify someone highly respected within the organisation (e.g., chief security officer, chief digital officer, chief ethics officer) who is responsible for building and maintaining trust, digital ethics and security with vendors, partners and consumers. These critical matters need steer by top management and cannot be delegated.



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SINGAPOREANS ARE INTERESTED IN COMPREHENSIVE VIRTUAL CARE

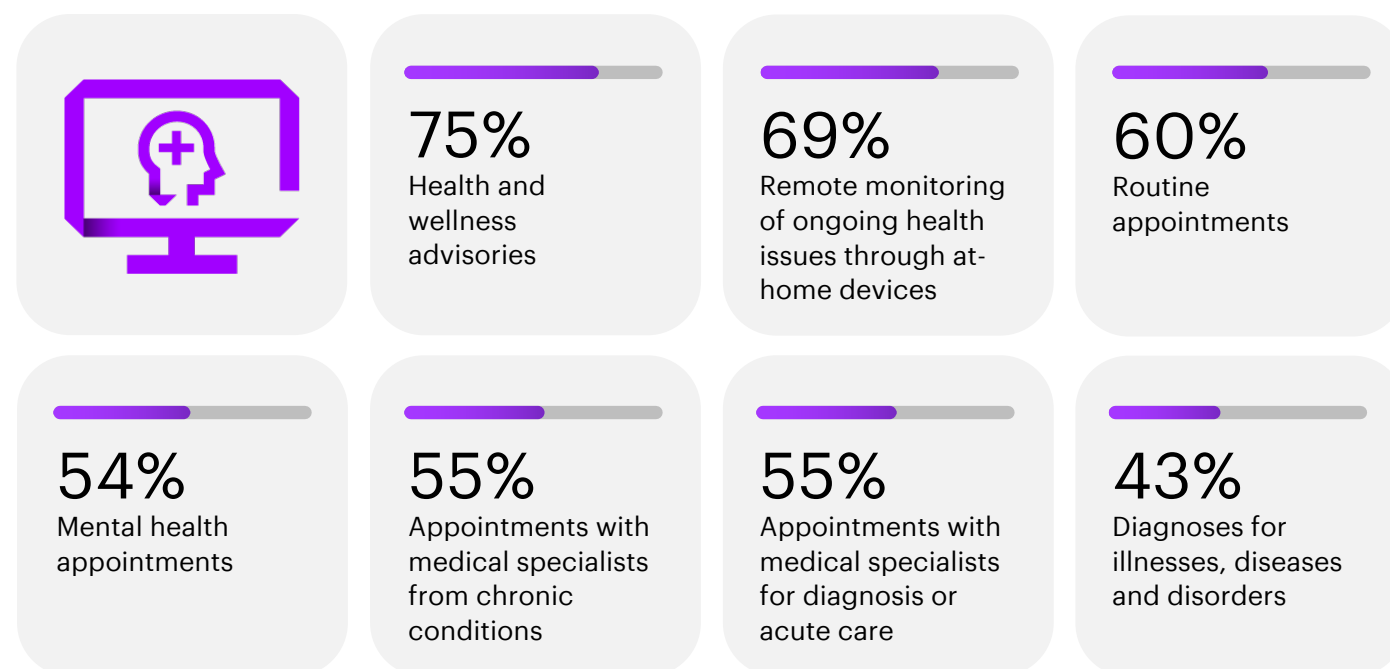
Beyond the urgency that drove adoption during the pandemic, and despite stalled growth in virtual health prior to COVID-19, consumers want virtual care services and doctors are key to promoting digital adoption and awareness. Younger generations even prefer virtual over in-person care in some cases, when given the choice. And although consumers would be willing to receive virtual services from traditional care providers, they are also open to receiving virtual services from tech companies and retail brands. These numbers will likely rise as digital-savvy generations come of age.



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

Given the choice, most healthcare consumers would choose virtual for basic care services, and even for specialty care. They “definitely” or “probably” would receive health and wellness advisories (75%), remote monitoring of ongoing health issues through at-home devices (69%) and nearly three-fifths (60%) would choose virtual for routine appointments. Some are open to receiving diagnoses virtually—43% for illnesses, diseases and disorders and 55% for appointments with medical specialists for diagnosis or acute care.

Figure 8. 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” responses n=1,000
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Financial support or incentives to stay healthy motivate consumers to manage their health

Financial support or incentives to stay can help maintain the crisis-era momentum as consumers look to them for motivation. “Financial support or incentives” ranked highest among factors that would motivate consumers to take a more active role in managing their health, cited by 54% of respondents. Consumers also ranked “Trusted healthcare professional” and “more time and energy to make health choices” as a motivating factor, with 46% and 39% consumers citing it, respectively. (Fig 10).

Before necessity drove a surge in virtual services, two-fifths of healthcare consumers surveyed (37%) 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. This has been supported by some providers with 20% consumers saying their healthcare providers recommend digital tools for patient health management.

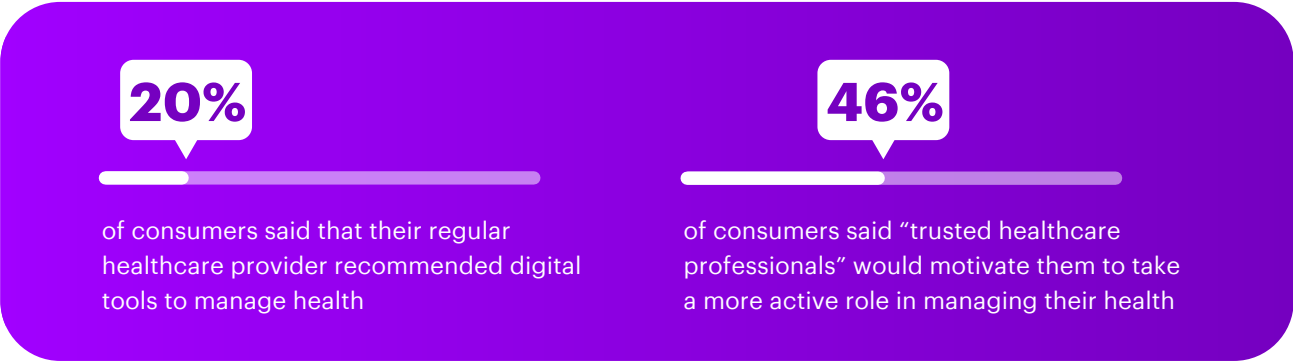
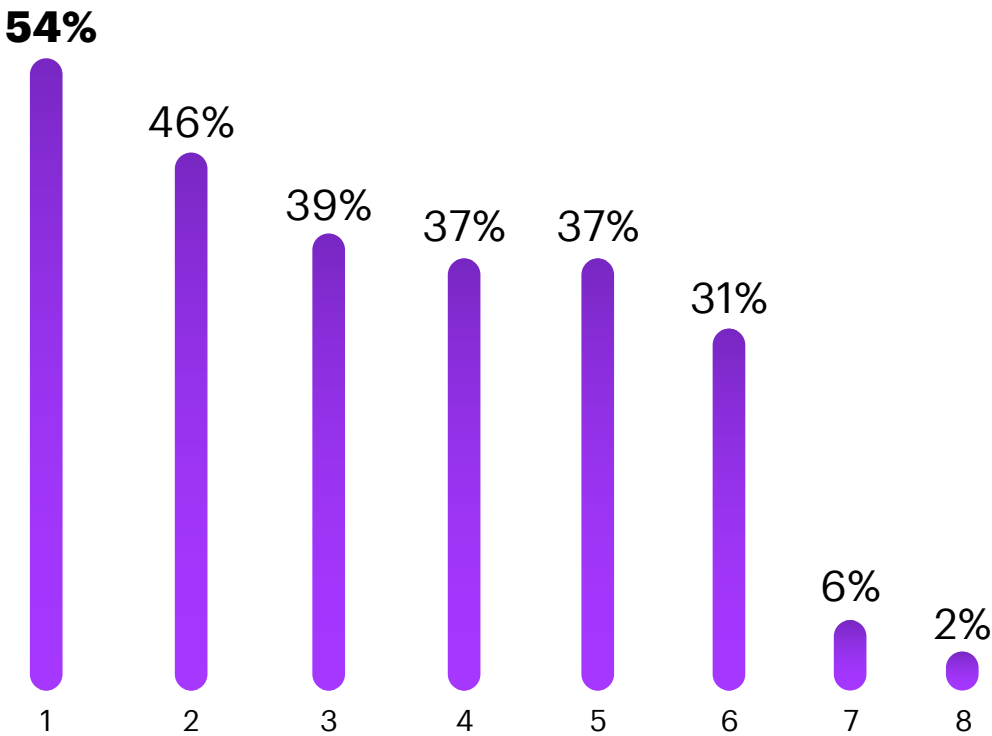


Figure 9. Finances and trusted healthcare professionals top the list of factors that motivate Singaporeans to take an active part in their own health management



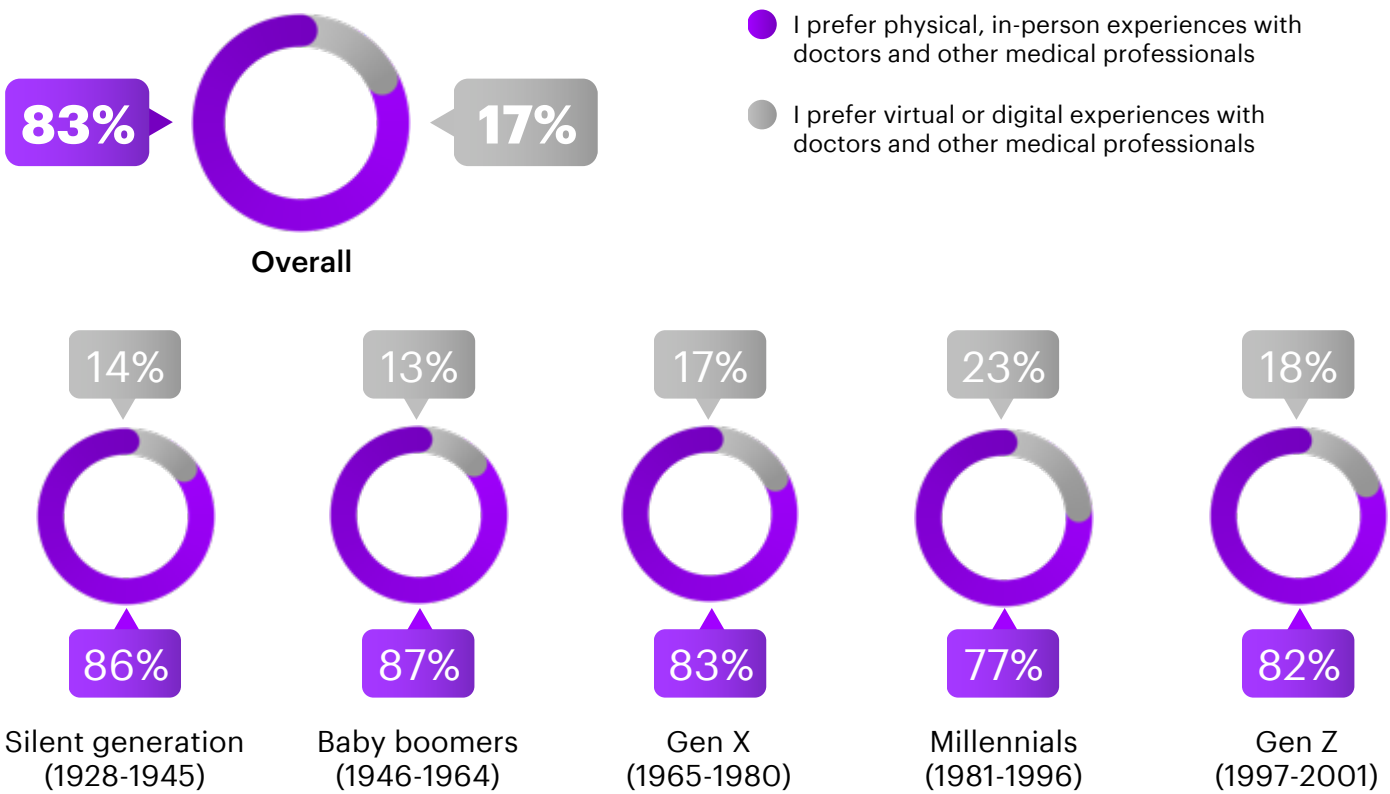
- 1 Financial support or incentives to stay healthy
- 2 Trusted healthcare professionals who work closely with me to manage my wellness
- 3 More time and energy to make healthy choices
- 4 Convenient access to healthcare professionals, either virtually or in person
- 5 Reliable, secure digital tools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

Q: Which of 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.

Younger healthcare consumers are open to virtual over in-person care

Overall, most consumers (83%) prefer physical, in-person experiences with care providers over digital experiences, but these numbers drop among younger generations. Among Gen Z, 18% would prefer a virtual or digital experience with a doctor or other medical professional, along with 23% of millennials.

Figure 10. Younger consumers are more open to virtual care over in-person



Q: Choose the statement that best describes how you feel.
Silent Generation n = 90; Baby Boomers n = 310; Gen X n = 265; Millennials n = 270; Gen Z n = 65
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.



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 (55%), they are also willing to receive virtual care from technology or social media companies such as Google and Microsoft (39%); medical startups (35%); and retail brands (31%).

Figure 11. Singaporeans are much more willing to receive virtual services from traditional providers



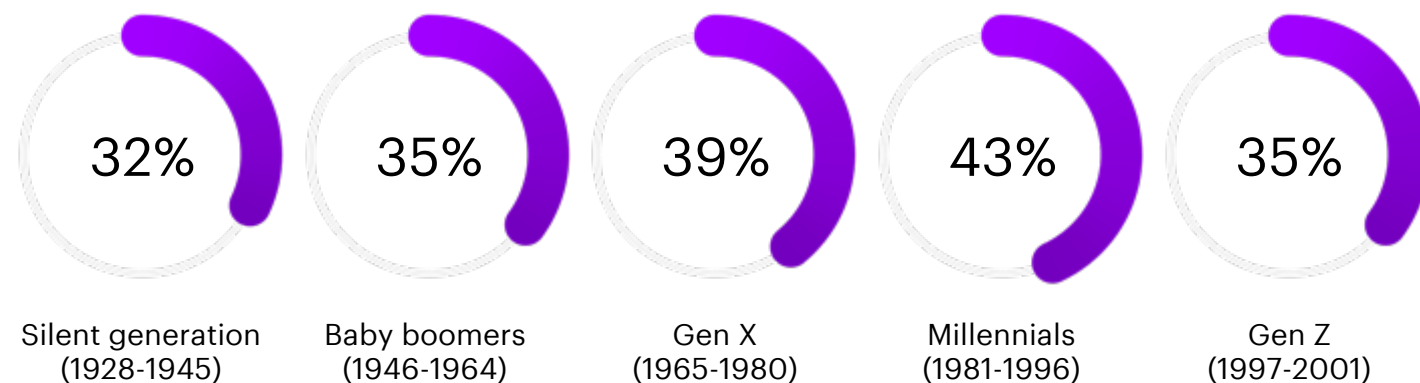
Q: Would you be willing to receive any of the following kinds of virtual healthcare?

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

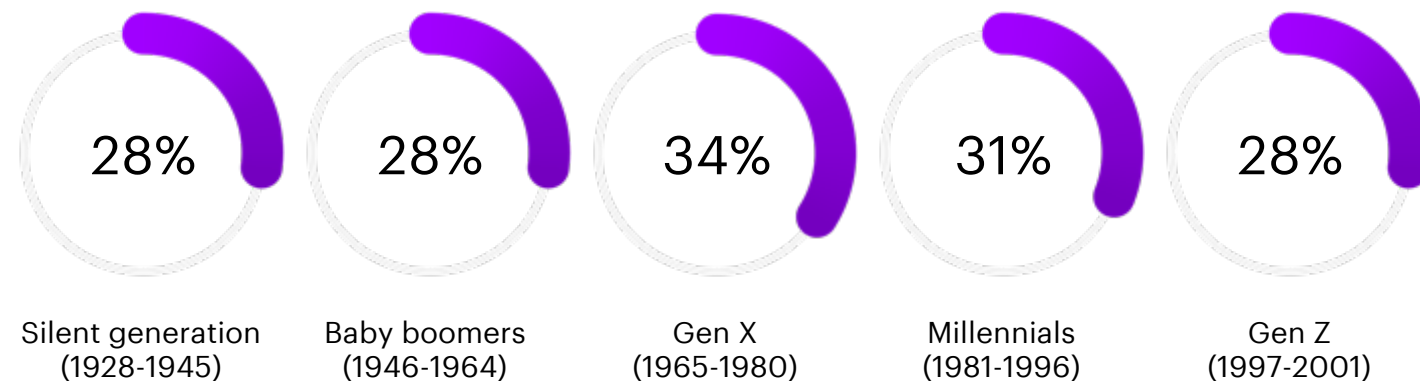
Openness to receiving virtual care from non-traditional entities varies among age groups

Comparatively, younger generations are more open than older generations to receiving virtual care from entities outside of their traditional provider relationship. For instance, Millennial respondents are more willing to receive virtual healthcare from technology or social media companies (43% Millennials compared to 32% of Silent generation) but this gap disappears when it comes to receiving care from retail brands (31% Millennials compared to 28% baby boomers).

Figure 12. Willingness to try virtual care from tech companies



...and from retail brands



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.

Engaging consumers in evolving methods of healthcare delivery, digital and physical

RECOMMENDATIONS FOR HEALTHCARE ORGANISATIONS

1

Financial support or incentives and trusted healthcare professionals are key to promoting digital engagement and awareness.

Singaporeans ranked finances rank higher than trusted healthcare professionals in driving digital health adoption and engagement. Nevertheless, once doctors are convinced of the efficacy of digital/virtual care tools, they become vital digital healthcare advocates. Organisations should combine financial support and incentives and engagement with doctors as leaders in digital health initiatives to leverage their authority and their position of trust to [promote awareness of and engagement with digital health among consumers](#), as they have done in response to COVID-19. Clinicians' position of trust, and their advocacy, will enable healthcare organisations to design their services and simultaneously maximise consumer trust.

2

Earn trust by being transparent and accountable. Non-traditional care providers, such as technology companies and retail/consumer brands, need to establish trust to earn a place on the new care team. They can do so by being transparent, asking for consent to use consumer data and by demonstrating proper use of consumer data. They can build on the greater confidence younger consumers have in their services—and expand from there. New and established healthcare organisations can seize this moment and earn trust by resetting promises to constituents. Good experiences with positive outcomes are the best way to build trust.

3

Marry digital/virtual care with physical care to provide effective, trusted, reliable care physically and at a distance. The new healthcare system will rely on seamless, coordinated care that provides people with the right attention, services, therapies and products anytime, anywhere, to instil confidence, safety and respect across all moments.



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

Accenture's Applied 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 in April and May 2020, 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.

About Accenture Insight Driven Health

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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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