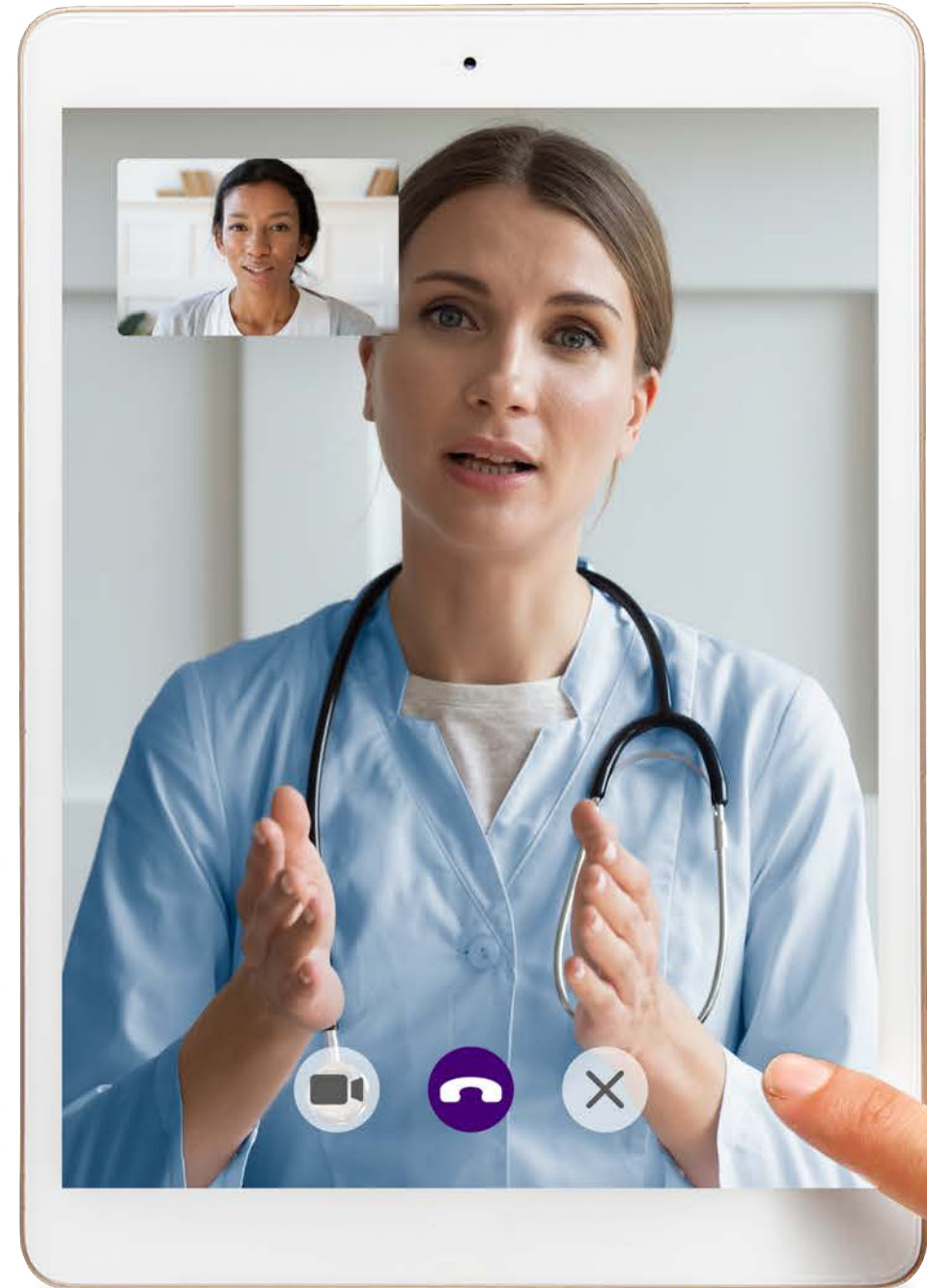




SUSTAINING THE GROWTH OF DIGITAL HEALTH

Re-Examining the Accenture 2020
Digital Health Consumer Survey

NORWAY FINDINGS



Executive summary

Our 2020 Digital Health Consumer Survey shows that virtual healthcare was struggling to make major inroads in Norway before the pandemic. Almost one third of consumers were not using any digital tools to manage their health—in part because they did not believe them to be secure or effective enough. Norwegians were, however, quite open to virtual care when delivered by trusted healthcare professionals and during the pandemic, both doctors and patients have been encouraged to go digital. Maintaining interest post pandemic will depend not only on the resolution of ongoing data privacy and security issues but also on providing the better and more reliable digital tools that Norwegians want. Norway’s doctors will also need to address sustainability for the five percent of the population that accounts for 50% of healthcare resources.

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

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

How COVID-19 forced a surge in digital interest

Our 2020 Digital Health Consumer Survey reveals that the use of digital devices and technologies for health management was slumping in Norway pre pandemic. From a high of 44% in 2018, only 38% of Norwegian consumers were using mobile devices and apps to manage their health in early 2020; and wearables use had also dropped, from 20% in 2018 to just 16%. COVID-19, however, has changed perceptions of digital health dramatically. Consumers have been actively encouraged to seek out video consultations and other digital tools instead of in-person doctor visits.¹ Doctors, too, have been urged to offer more virtual services.² The Ministry of Health and Care Services has facilitated the use of virtual health by making significant changes to the tariff system. Physicians can now use auxiliary staff in an e-consultation, for example.³

“In future healthcare we need to change the way we work—virtual care represents one of those changes.”

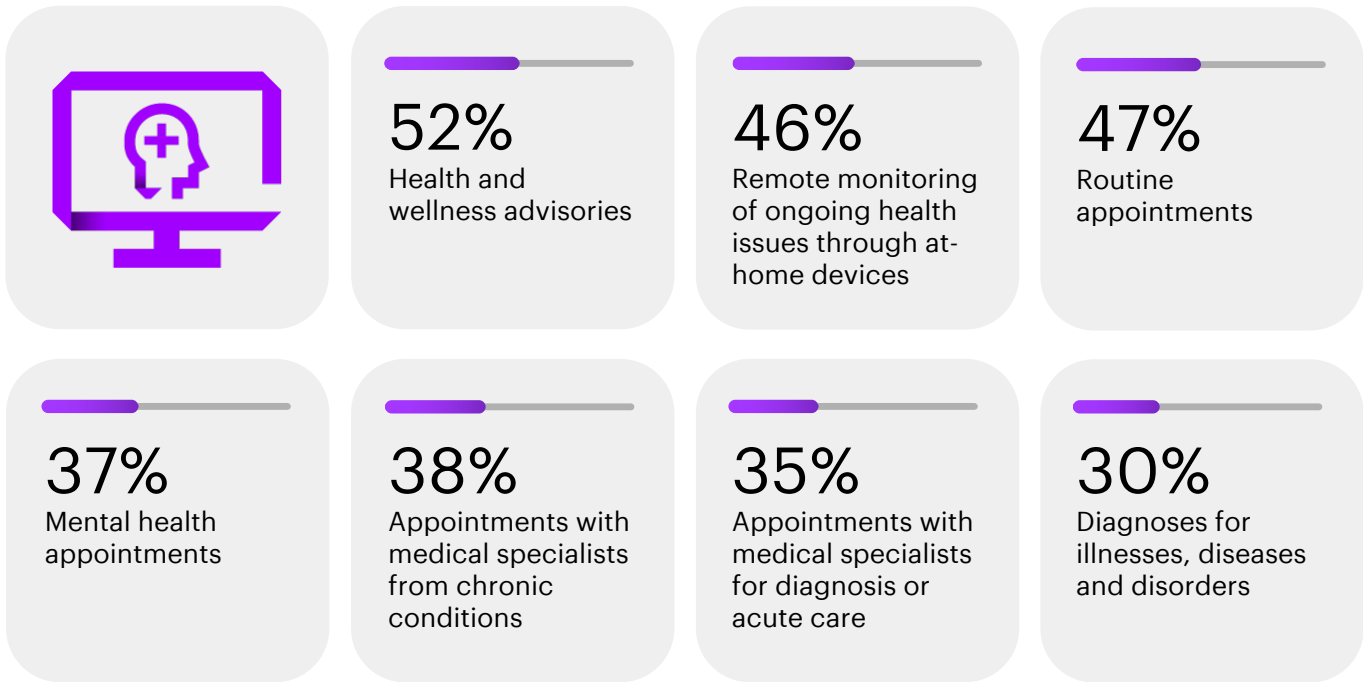
THOR STEFFENSEN, SENIOR ADVISOR, NORWEGIAN DIRECTORATE OF EHEALTH



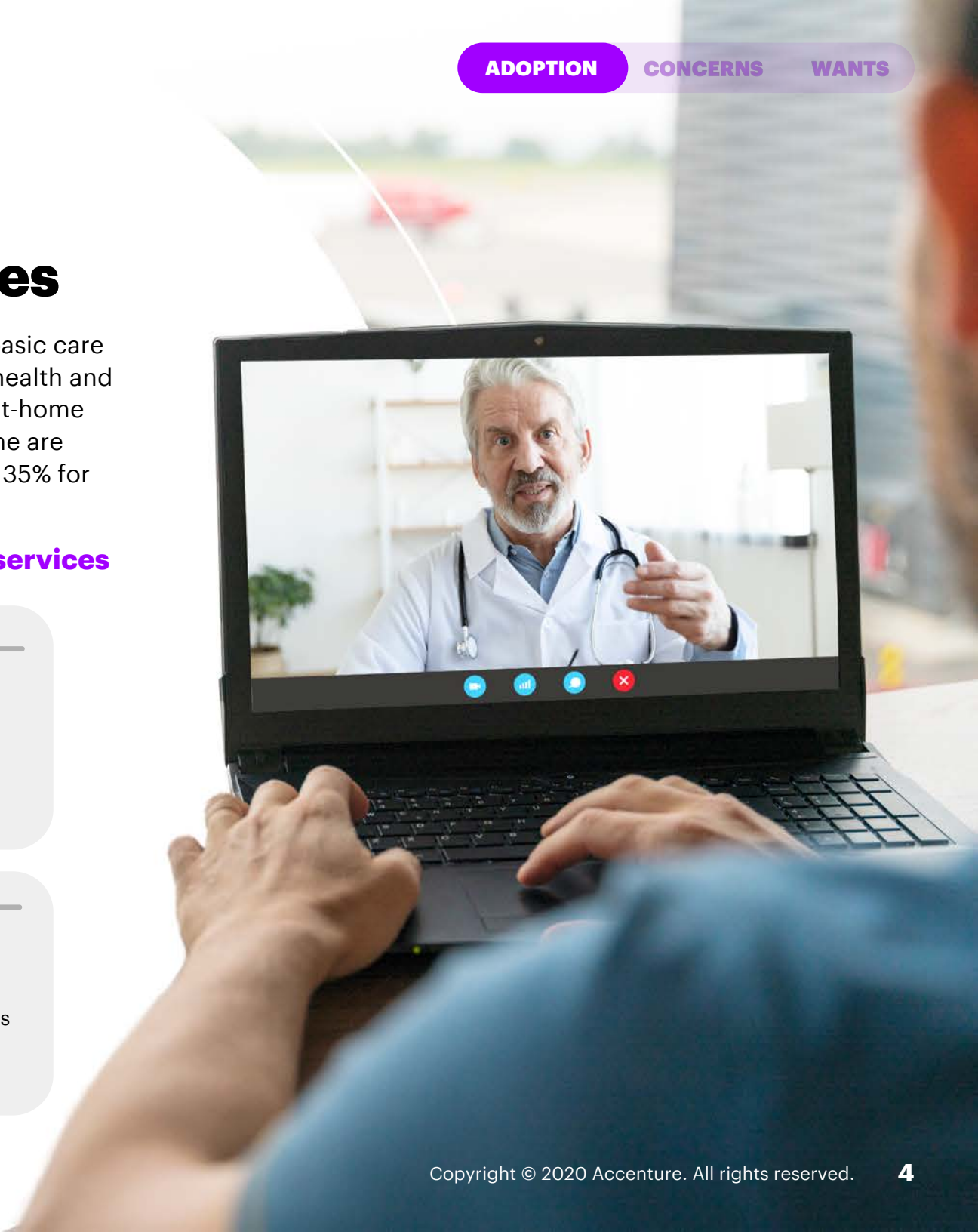
Beyond the urgency that drove adoption during the pandemic, consumers want virtual care services

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 (52%) and remote monitoring of ongoing health issues through at-home devices (46%), and nearly half (47%) would use virtual for routine appointments. Some are open to receiving diagnoses virtually—30% for illnesses, diseases and disorders and 35% 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” responses
2020 survey data is from November to December of 2019 and reflects patient attitudes prior to the global spread of COVID-19.



Privacy and data security are significant concerns

Before necessity drove this surge in interest, 46% of Norwegian consumers said that trusted healthcare professionals would motivate them to take a more active role in managing their health. Yet only 8% said their doctors had recommended the digital tools that would enable them to do so. (That's far fewer than in neighbouring Finland, for example, where a similar proportion—49%—cited trusted healthcare professionals as key motivators, but where as many as 19% said their doctors had recommended digital tools).

Persistent concerns about data privacy and security appear to explain much of this hesitancy. Pre-pandemic, a report from Norway's e-Health Directorate showed that although familiarity with digital health was growing, trust remained an issue: only around half (54%) of Norwegian consumers were confident that access to their personal health data was restricted to the "relevant" physician.⁴

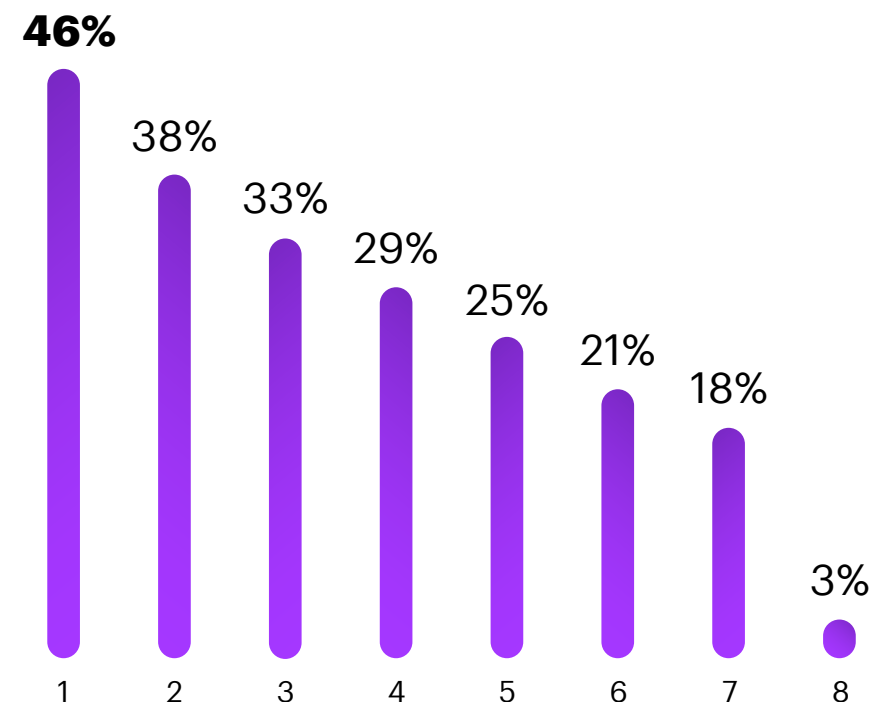
8%

of consumers said that their regular healthcare provider recommended digital tools to manage health

46%

of consumers said trusted healthcare professionals would motivate them to take a more active role in managing their health

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 Personalised 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

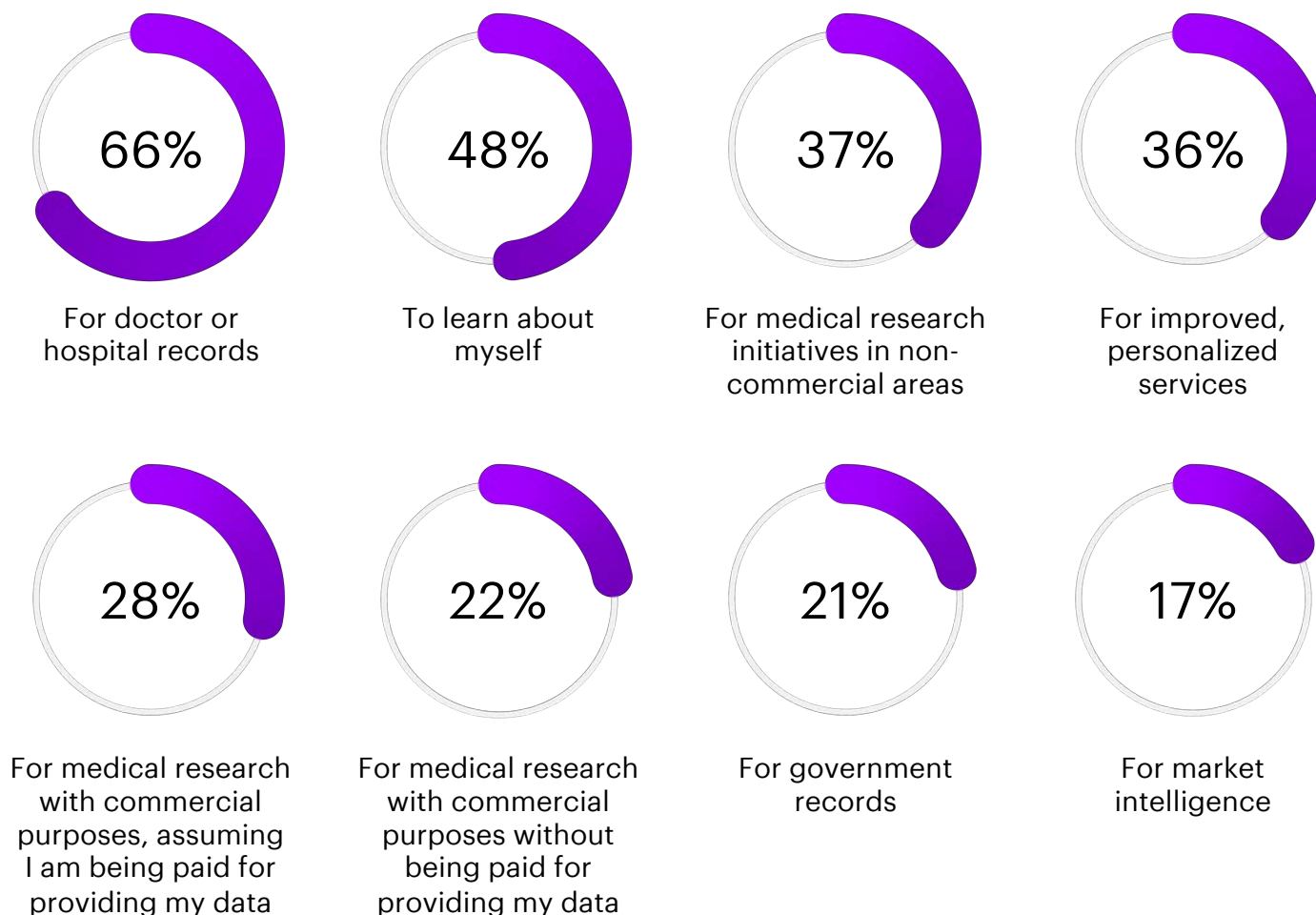
Q: Which the following would most motivate you to take a more active role in managing your health?

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

Privacy and security expectations

Figure 3: Few are willing to share data needed for broader purposes

“Completely comfortable” and “Comfortable” responses



In addition, our own survey showed that although 68% of Norwegian respondents were willing to share their data “for doctor or hospital records,” only around one quarter were prepared to share it for such purposes as medical research (even if they were paid for providing it: 28%) or for government records (21%).

Since the start of the pandemic, the data privacy issue re-surfaced. It was reflected in significant concerns about the [Smittestopp](#) (infection stop) tracking app, for instance. Some security experts claimed the app would encourage scammers⁵ and coupled with concerns about violating the EU’s “principle of data minimisation”⁶ these doubts may have contributed to the app’s withdrawal in June 2020.⁷

Norway’s health authorities need to ensure that privacy and security expectations are met.

Q: How comfortable are you with the following applications of your personal health/medical data?

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

Even digitally savvy consumers trust traditional providers more with their data

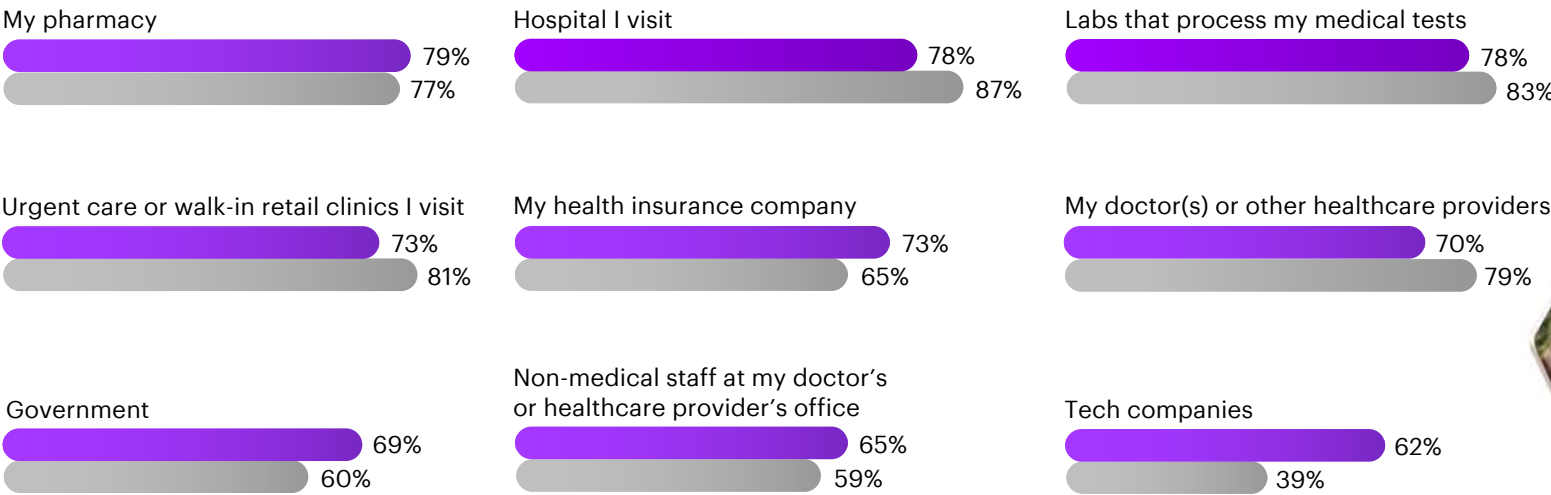
Consumers already familiar with virtual health were significantly more likely to trust tech companies to keep their health data secure than those who were not (62% vs 39%). Even so, traditional providers (including hospitals, labs and pharmacies) were still trusted more overall with personal data by both types of consumer, and the 70% of virtual care users who trusted doctors to keep their data safe was almost as high as the 79% who had not used digital health at all.

Medical doctors’ buy in will be critical to the ongoing adoption of virtual health.

Figure 4. Virtual care users are more likely to trust tech companies

Those who have received virtual care Others

“Very much and “Some” responses



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 personal information) secure?

Those who have received virtual care n=135, others n=665

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



Gaining confidence in a new system

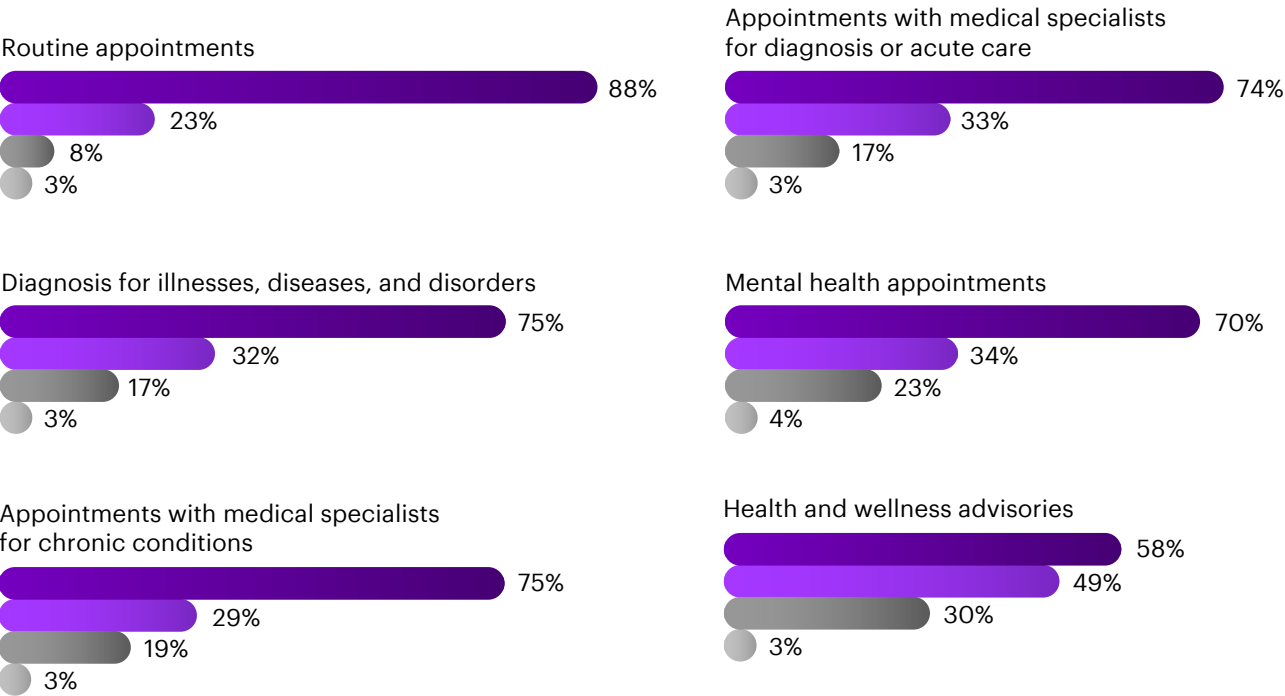
Norwegians plainly place great trust in medical doctors. In fact, they much prefer them over digital tools for every type of care, including routine appointments (88% vs 8%).



Figure 5. 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

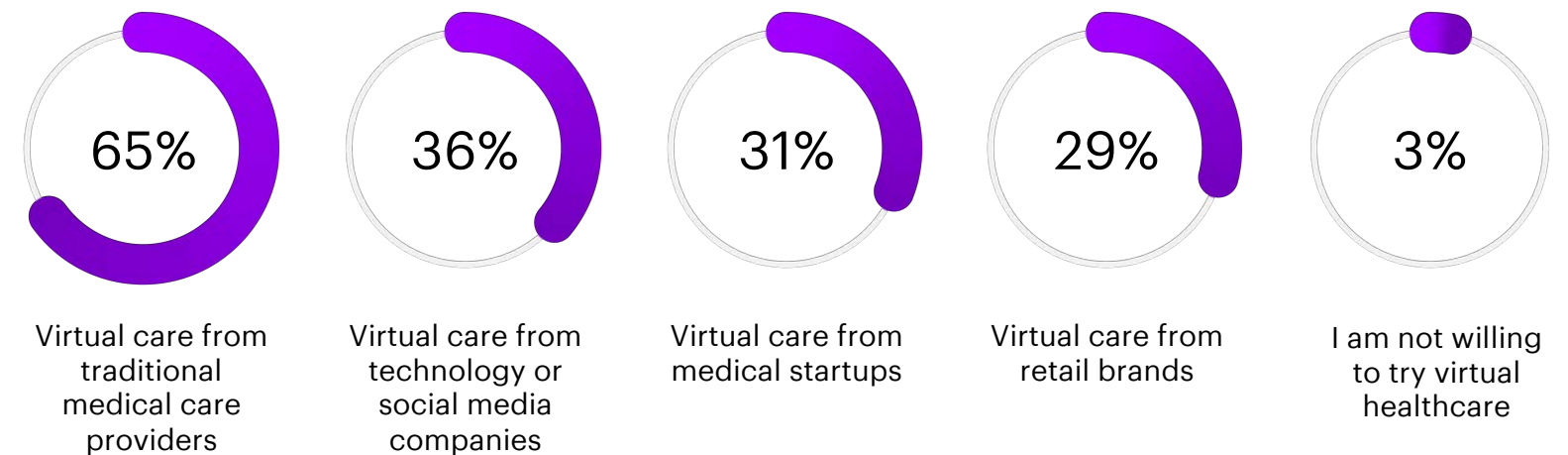


Q: Which services would you seek out with the following healthcare providers?
 2020 survey data is from November to December of 2019 and reflects patient attitudes prior to the global spread of COVID-19.

Interest in virtual care is strong

That's perhaps also why 65% would be happy to receive virtual care if it were provided by traditional doctors—far more than the 36% who told us that they would accept it directly from technology or social media companies, or the 29% who would take virtual care from retail brands.

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



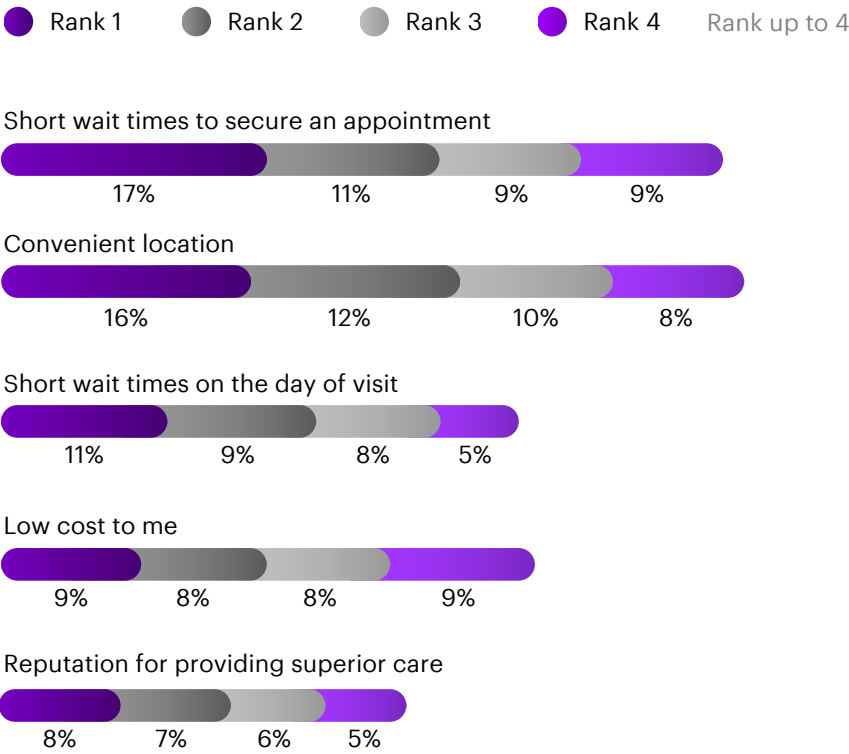
Q: Would you be willing to receive any of the following kinds of virtual healthcare?

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

Norwegians want fast and convenient access to care

Convenient access to healthcare matters greatly to Norwegians. In fact, when asked which factors most influence their decisions about when and where to seek medical treatment or services, 38% cited a convenient location—as opposed to a global average of 33%.

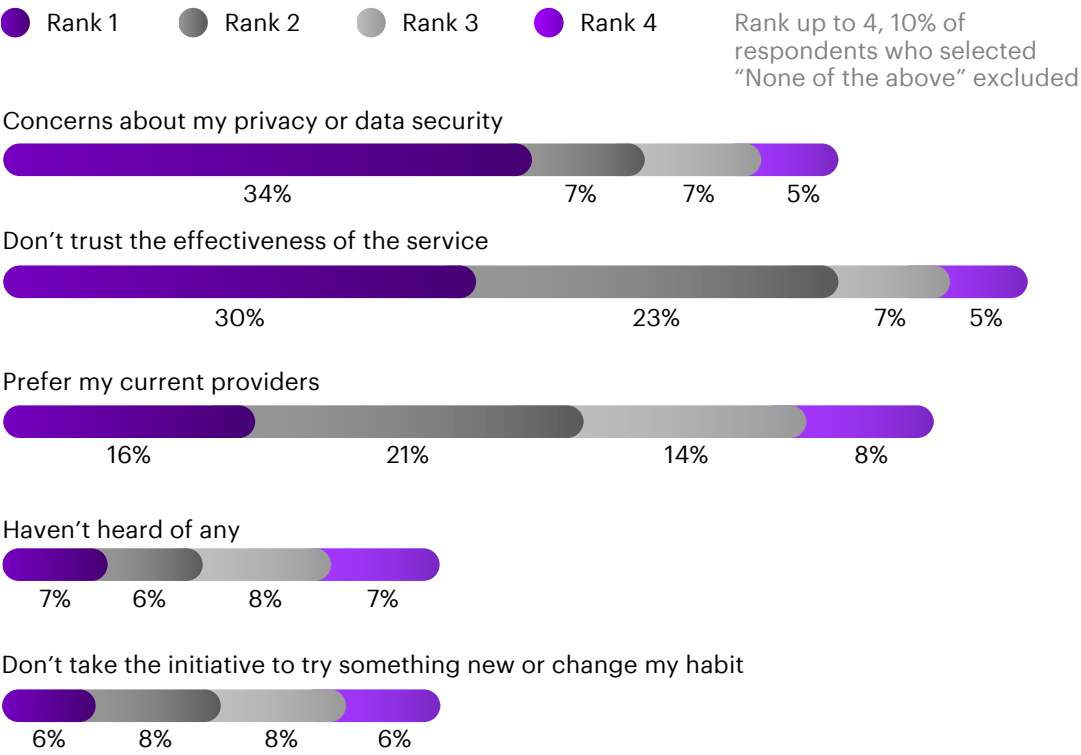
Figure 7. Factors influencing decisions about medical treatment



Q: Which of the following factors most influence your decisions about when and where to seek medical treatment or services?
2020 survey data is from November to December of 2019 and reflects patient attitudes prior to the global spread of COVID-19.

But although two thirds of Norwegian respondents also told us they would switch to a virtual service for faster or more convenient access to care, their current confidence in the effectiveness of virtual tools is low. Almost as many cited poor effectiveness as a reason to avoid digital devices and services as those who gave data privacy and security concerns as the top ranked reason (30% vs 34%).

Figure 8. Lack of trust in effectiveness stalls chatbot growth



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

Recommendations: Security and sustainability are key

MORE EFFECTIVE AND RELIABLE DIGITAL HEALTH TOOLS ARE REQUIRED

Despite present limitations, virtual health has a promising future in Norway. Our research showed that while most consumers (85%) still prefer physical, in-person experiences with care providers over digital experiences, younger generations are already somewhat more open to digital. What's more, consumers overall demonstrate a basic openness to digital services. More than half (52%) would "definitely" or "probably" receive health and wellness advisories virtually, for example. As many as 30% said they would even be prepared to receive digital diagnoses.

1

Make the value of health data visible, and its use transparent. The more we know about how our personal health data is being used, the easier it is to have confidence in its appropriate use. How many Norwegians are familiar with what data is stored about them, what the purpose of the data is, and that they have the right to see it? Norwegians need to be educated on the value of health data, and understand why sharing personal health data with the healthcare professionals who need it is important, both to the best of our own health through primary use and to the best of other peoples' health through secondary use.

2

Promote a tighter doctor-patient relationship. Norwegians want to be more in charge of their own health, and they are willing to use virtual health services to a larger degree than they do today. However, the increased adoption of these services requires a tight collaboration between the doctor and the patient. Both the needs of the patient and the proving of the clinical quality must drive the development of virtual healthcare services. (Proving the clinical quality is straightforward: prove through clinical research that any new way of delivering a healthcare service is at least as good as the existing way of doing it.)

"Throughout our extensive experience we keep seeing that the patients are really demanding new, more modern healthcare services."

**KRISTIN STANDAL, PROJECT MANAGER, KS
KOMMUNSEKTORENS ORGANISASJON
OSLO**

3

Keep improving the quality virtual health itself. Although the technology to a large extent is already there and ready to be used, there is also a lot of room for improvement. An example is chatbots. There is still a long way to go before we find talking to a machine as useful as talking to a human being, even about very simple topics. The task is simple: keep improving the quality of digital healthcare services, and make sure that we have realistic expectations as we go along.

4

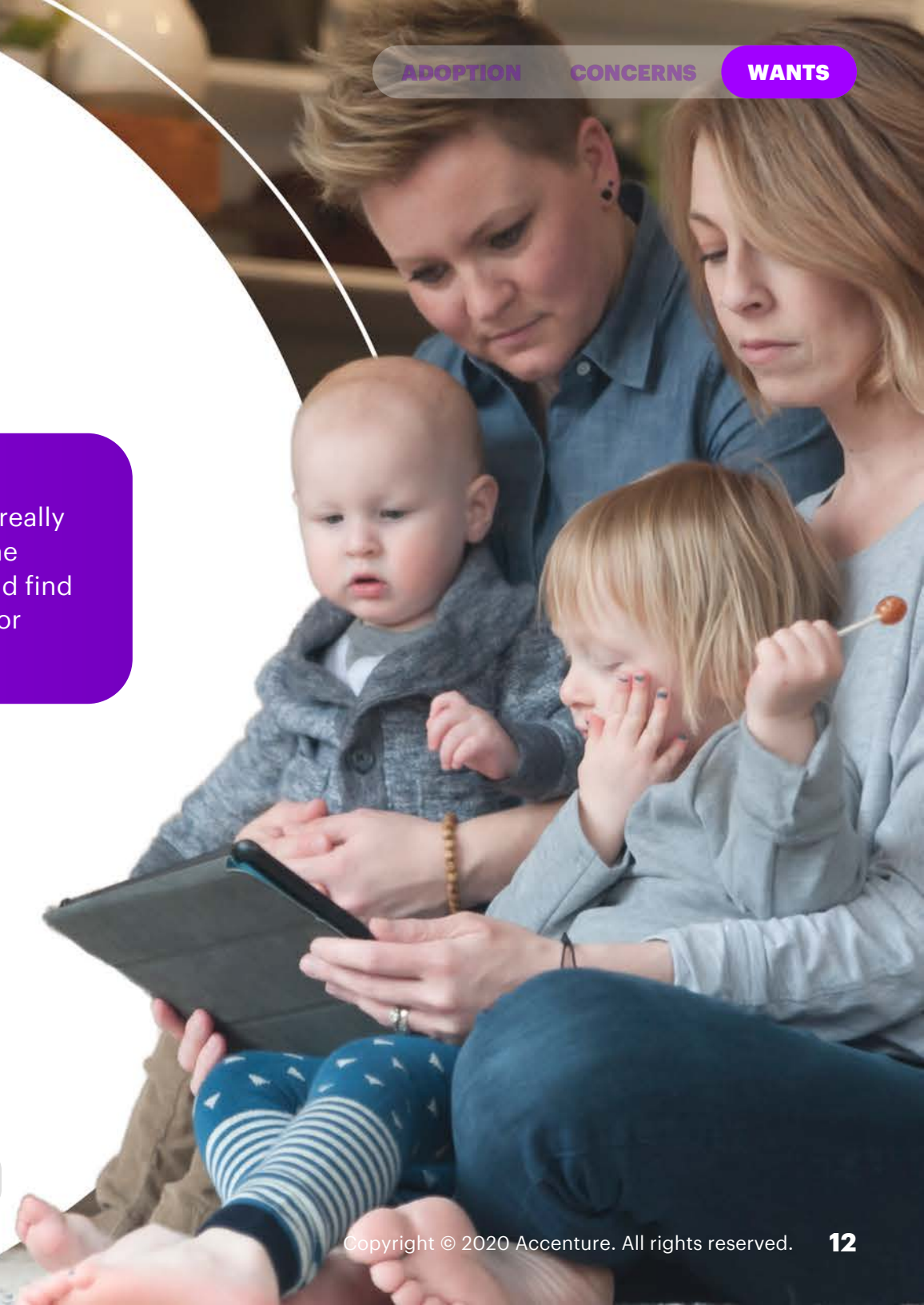
Keep up the Covid-19 momentum. The Covid-19 pandemic has given us a glimpse of the future of healthcare. It shows that when the circumstances really require us to change the way healthcare services are delivered, we have the ability to do so. In the time to come we need to keep up the momentum and find that right hybrid between when to use some form of virtual or digital tool (or simply the phone), and when to physically go see a doctor or nurse.

“One thing is for sure – we cannot go back to the way we were doing healthcare before Covid-19”

CHRISTIAN SKATTUM, INNOVATION LEAD, OSLO UNIVERSITY HOSPITAL



Typing...



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Geir Prestegård leads Accenture Nordic Health practice which partners with leading 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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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 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.

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About Accenture

Accenture is a leading global professional services company, providing a broad range of services in strategy and consulting, interactive, technology and operations, with digital capabilities across all of these services. We combine unmatched experience and specialized capabilities across more than 40 industries – powered by the world's largest network of Advanced Technology and Intelligent Operations centers. With 506,000 people serving clients in more than 120 countries, Accenture brings continuous innovation to help clients improve their performance and create lasting value across their enterprises. Visit us at www.accenture.com.

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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