The ultimate healthcare experience: what people want

2021 Accenture Health and Life Sciences Experience Survey–**Global report**

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The power in healthcare's patient-provider relationship has shifted distinctly towards the patient.

The rapid growth of digital technology, combined with service experience benchmarks set by other industries, has made a clear understanding of peoples´ expectations vital to successful healthcare delivery—both public and private.

Healthcare ecosystems across the globe were tested in ways we never imagined possible in the last year. In our 2021 Health and Life Sciences Experience Survey[1] we talked to almost 12,000 people over 14 countries and measured the effects of those challenges. We investigated whether there are any lasting improvements, whether efficiency has come at the cost of emotional support and whether virtual care was temporary—or changed the system forever. The results revealed that people no longer look at healthcare as a one-way, one-size-fits-all transaction. They demand a combination of factors that allow everyone to be treated safely, equally and with kindness.

[1] To understand how healthcare experiences are changing and establish the patient view on what makes a great healthcare experience, Accenture surveyed 11,823 people aged 18+ between May and July 2021. We gauged their opinions on healthcare experiences across 14 countries in terms of access, equity, service experience, digital technology adoption and trust.

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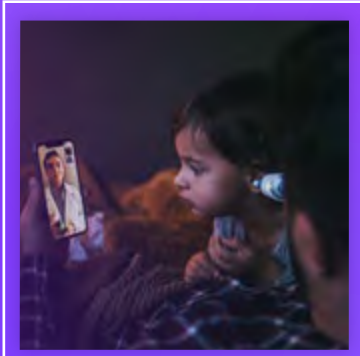
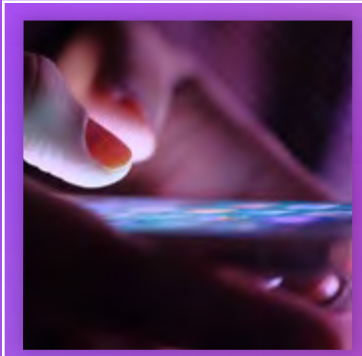
What a great healthcare experience looks like

We learned from respondents that there are four key facets.



1.

The importance of emotional support



3.

Protect their data—build their trust

2.

Technology-driven convenience and accessibility

4.

The vision: equitable access for all

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THE IMPORTANCE OF EMOTIONAL SUPPORT

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The importance of emotional support

Bedside manner has long been a watchword for patients wanting more than medical advice and treatment from their caregivers. Our study confirmed that emotional support and clear medical information delivered with empathy is a winning formula.

The emphasis is slightly different across generations, however. In the countries we surveyed, the likelihood that respondents care about providers who explain conditions clearly and provide emotional support increases as one moves from younger generations (GenZ, Millennials) towards Baby Boomers[2]. Respondents in the millennial generation and younger are slightly more interested in working with providers who use innovative digital technologies to optimize health experiences. The two most important factors for a positive healthcare experience are:

- A medical provider who explains conditions and treatments clearly
- A medical provider who listens, understands needs and provides emotional support

In general, then, a great healthcare experience for people from Gen X or older seems to be more dependent on advice from medical providers, versus Millennials and younger people who are more open to advice and information from other sources. Nevertheless, traditional healthcare players are still the most relied on overall for medical advice, treatments and acute healthcare needs overall:

- Medical providers (in-person—48%)
- Pharmacies/pharmacists (45%)
- Hospitals (34%)
- Over-the-counter medications (29%)
- Medical providers (virtually—12%)

Different generations behave differently when it comes to adopting advanced digital healthcare technology and accessing information. Healthcare providers can't rely on the strategies they're using to manage healthcare experiences today, to take them into the future.

What does this mean for life sciences and healthcare organizations? It seems valuable to nurture the patient/physician relationship and personalize patient information flow. Digital technology doesn't replace the human touch, but it can promote empathy-driven patient experiences by ensuring that relevant information is available at the right time and place, freeing clinicians' time, building trust and ultimately improving health outcomes.

[2]Survey respondents represented a range of ages groups: 10% Gen Z (ages 18-24), 32% Millennials (ages 25-41), 23% Gen X (ages 42-56), 30% Baby Boomers (ages 57-74), and 5% of those ages 75 or older.

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Generational differences

Our study highlighted several differences between generations when it comes to healthcare technology adoption.

Younger generations (GenZ, Millennials) were more likely to have used a variety of digital technologies to manage their health in the past year and are more likely to be comfortable with AI applications in healthcare.

Quality, cost and recommendations from friends and family are more likely to motivate younger generations to use digital technology, whereas recommendations from medical providers are more likely to motivate older generations.

Recommendations from medical providers and the ability to give providers useful information about health conditions are also more likely to motivate older generations (GenX, Baby Boomers) to participate in a digital health management program, whereas recommendations from family/friends and social media are more likely to motivate younger generations.

Older generations tend to prefer providers who explain conditions clearly and provide emotional support; working with providers who use digital technologies to optimize health experiences is slightly more important for younger generations than for older generations.

Of those who can't afford their medical care, younger generations are more likely than older generations to rely on digital technologies and digital therapeutics to manage their condition; they are also more likely to use rebates, non-profit services or other forms of financial assistance to get the care they need. Older generations are more likely to treat their condition with over-the-counter medications.

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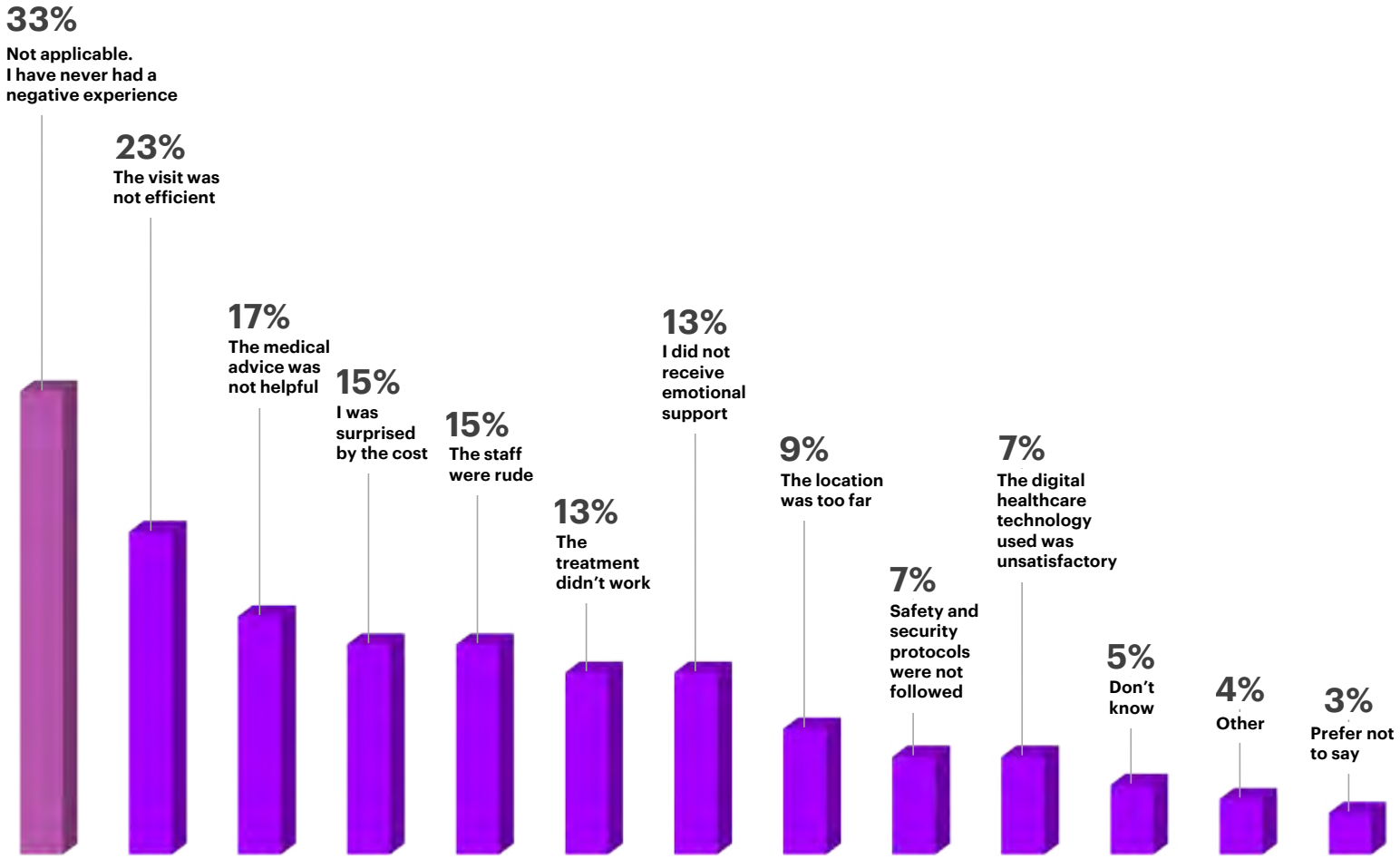
What causes negative experiences? The most frequent source of bad experiences among our respondents was inefficient visits to medical providers (23%). One-third said they have never had a negative experience with a medical provider, pharmacy or hospital personally. Respondents identifying as patients, and patient/non-patient respondents from millennial and younger generations, were less likely overall to say they have never had a negative experience (see figure 1).

Negative healthcare experiences can result in undesirable healthcare decisions—patients might be less likely to seek medical care, for example. The evidence is difficult to deny. Of those who had negative experiences, 41% were stressed/upset, 31% were less likely to seek medical care the next time they needed it, 29% switched providers/treatments, all of which may directly impact the businesses of providers and life sciences companies. Therefore, the positive experience is not just nice to have but could impact the sustainability of their business.

Figure 1. Lack of efficiency and helpfulness make healthcare experiences negative

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 the experience negative?



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n=11,823

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TECHNOLOGY-DRIVEN CONVENIENCE AND ACCESSIBILITY

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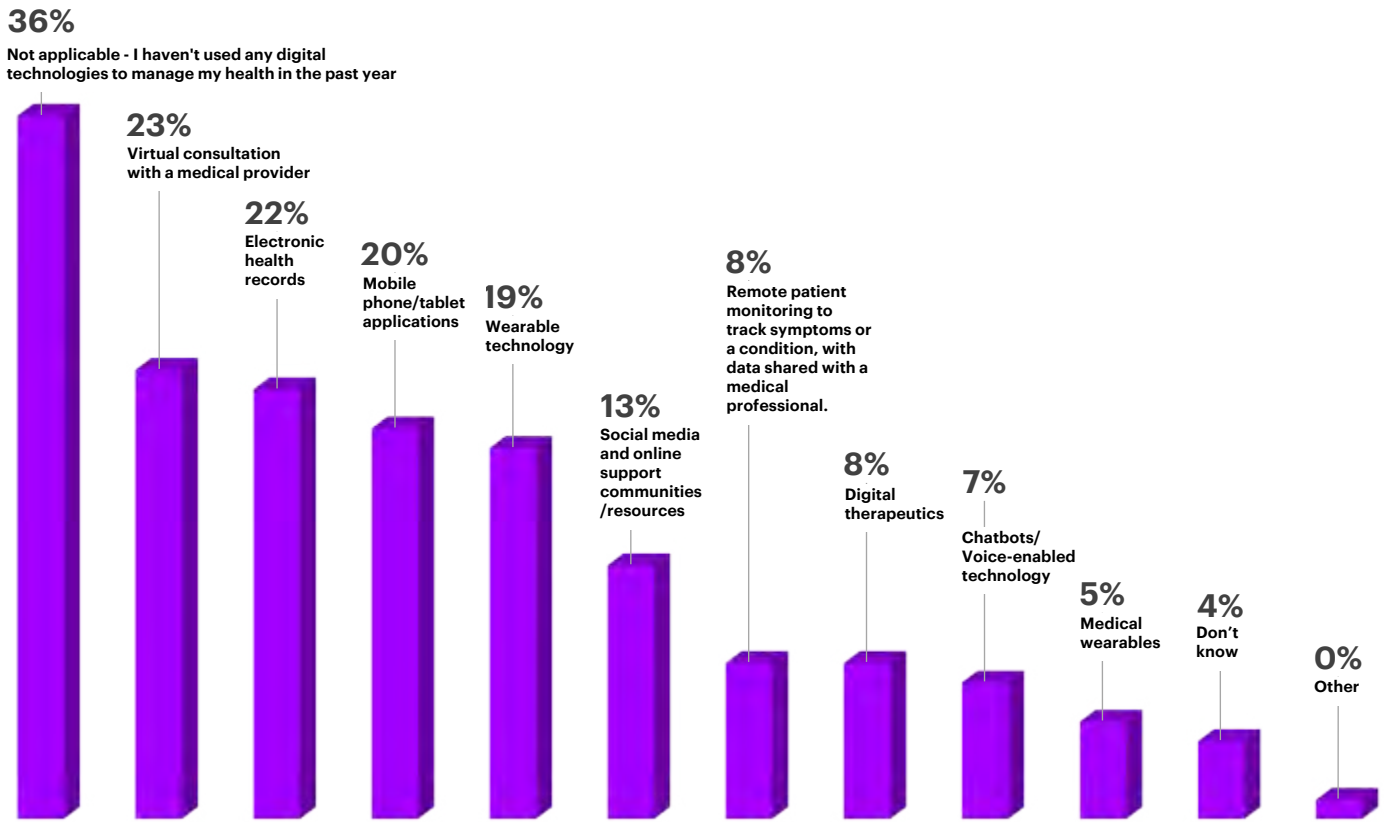
Technology-driven convenience and accessibility

Our survey revealed marked growth in virtual consultations and electronic health records (EHRs) during the COVID-19 pandemic—with convenience as the biggest incentive to use virtual technology.

More specifically, the survey indicated that virtual consultations (23%), electronic health records (21%), mobile apps (20%), and wearables (19%) were the most popular technologies used to manage respondents' health in the past year (see figure 2). A minority of 36% say they have not used any digital technologies at all to manage their health in the past year, a response which was more common in respondents from Gen X and older generations. While digital therapeutics adoption is still low, we see a higher adoption in Millennials and younger respondents.

Figure 2. Opportunities for improved digital health technology adoption

Which, if any, of the following digital technologies have you used to manage your health in the past year?



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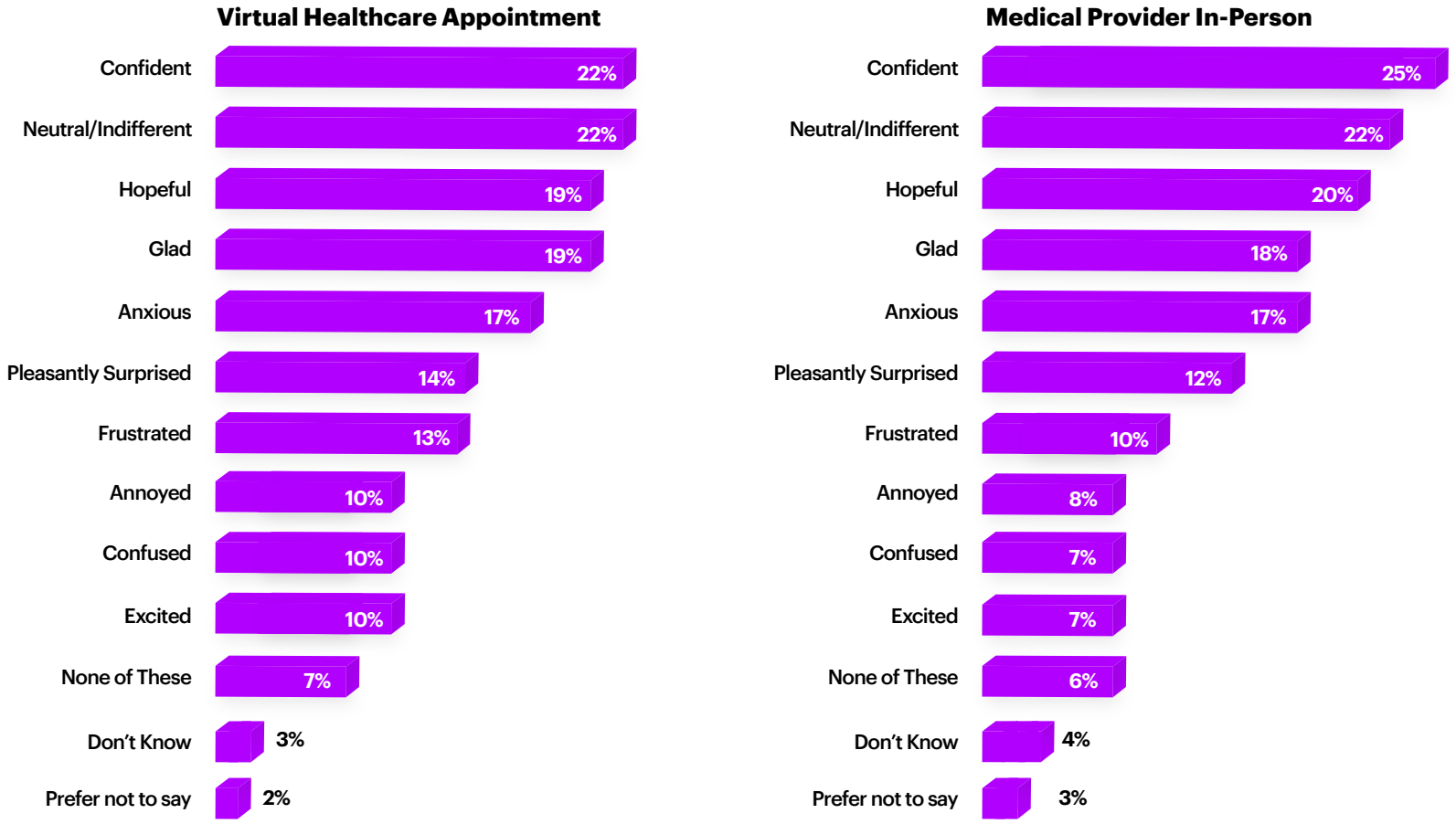
Healthcare organizations that want to provide a truly great, personalized healthcare experience will have to diversify their channels based on people´s preferences. That means meeting with people where they prefer to meet and using technologies to enable personalization such as virtual consultations, electronic health records, mobile apps and wearables.

Patients who have used virtual consultations are very satisfied with their patient journey (see figure 3), but it is difficult to attribute lower satisfaction levels among those who never had a virtual care appointment to the lack of virtual experience. It could be some other factor causing this correlation—nevertheless, the convenience factor (virtual care's biggest motivator, according to our survey) is likely to win them over once they experience it. In fact, virtual experiences create very nearly as much positive emotion as in-person consultations, and patients would use digital technology for a number of important interactions with healthcare organizations.

Figure 3. Virtual experiences are nearly as pleasant as in-person consultations

Thinking back to the LAST time you had a virtual healthcare appointment...
Which, if any, of the following emotions describe how that interaction made you feel?



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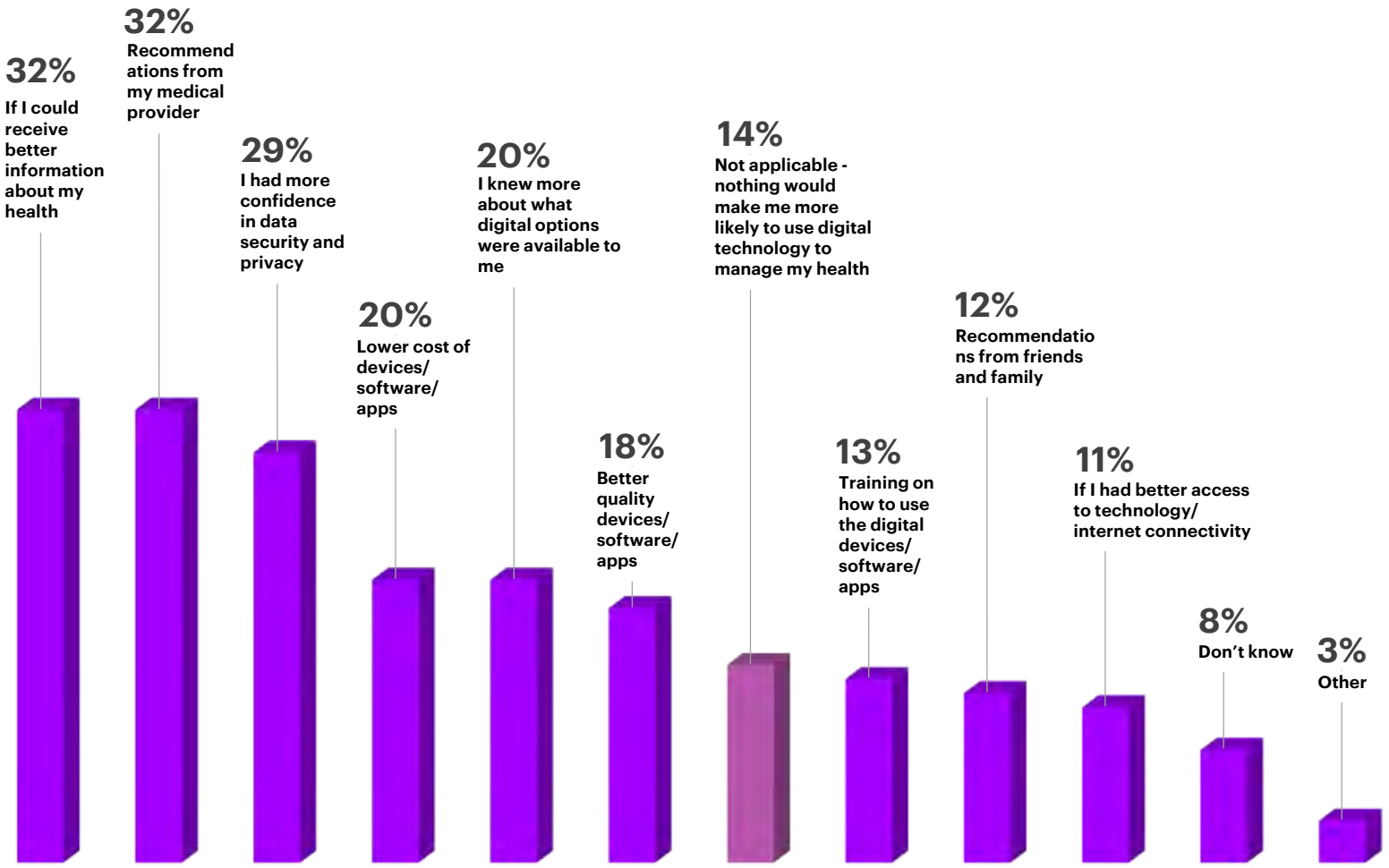
There are an increasing number of opportunities for digital technology to support great experiences by making healthcare easier, more convenient for patients and improving access when in-person healthcare is not available or wanted. Healthcare providers and biopharma companies can invest with this reality in mind and build digital services and tools that enable convenience by increasing patient choices and provider flexibility.

For providers wanting to increase digital adoption, it's important to note that receiving better information about their health is one of the top three reasons that consumers would use digital technologies (see figure 4). Our study also revealed that a great healthcare experience with technology must include a medical provider's recommendation to help influence people—especially Gen X and older respondents—to use digital technologies more frequently to meet their healthcare needs. In contrast, Millennials and younger people are more likely to be influenced by quality, cost and recommendations from friends and family when it comes to digital technology use than older generations.

Figure 4. Improved information and care provider recommendations would make people more likely to use digital technology to manage their health

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



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PROTECT THEIR DATA BUILD THEIR TRUST

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Protect their data—build their trust

Without people´s trust, digital adoption is unlikely to reach its potential. The unfortunate domino effect is that without digital adoption, emotional support and convenient access are at risk. The pandemic-driven increase in virtual care has increased people's awareness of the value of their health data—and the need for their consent and for its secure and appropriate use. Obtaining consent is easier if people's personal health data is exchanged for rewards like improved health outcomes or enabling clinical research about medication or treatment efficacy that benefits society in the long run.

Overall, the data leads us to two conclusions:

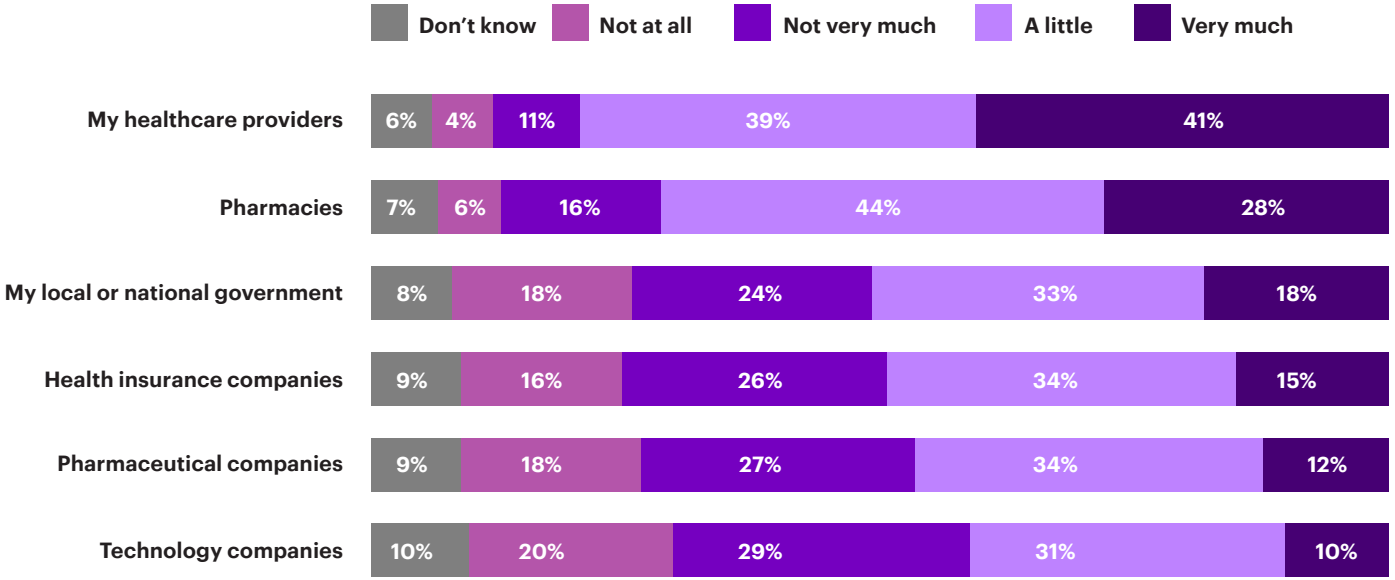
1. To increase trust for overall digital adoption, prioritize data security and patient consent.
2. To increase trust in pharma companies, increase transparency with respect to medical research data.

Growing digital adoption

Building patient trust for information security starts with trust in providers, who are trusted by most to handle personal digital health information responsibly. Respondents are much less trusting when it comes to certain corporate organizations (see figure 5). Greater transparency and emphasis on people´s consent can bolster trust. This applies particularly to the use of their personal health information, and of advanced technology applications and medications for their treatment.

Figure 5. Healthcare providers are trusted more than other organizations to keep personal digital healthcare information secure

Overall, how much do you trust each of the following people or organizations to keep your digital healthcare information (including electronic medical records and other personal information) secure?



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Overcoming the trust obstacle to drive digital health technology adoption requires **three primary approaches:**

1. Recommendations from trusted medical providers
2. Creation of greater confidence in data security
3. Clear personal benefit to people

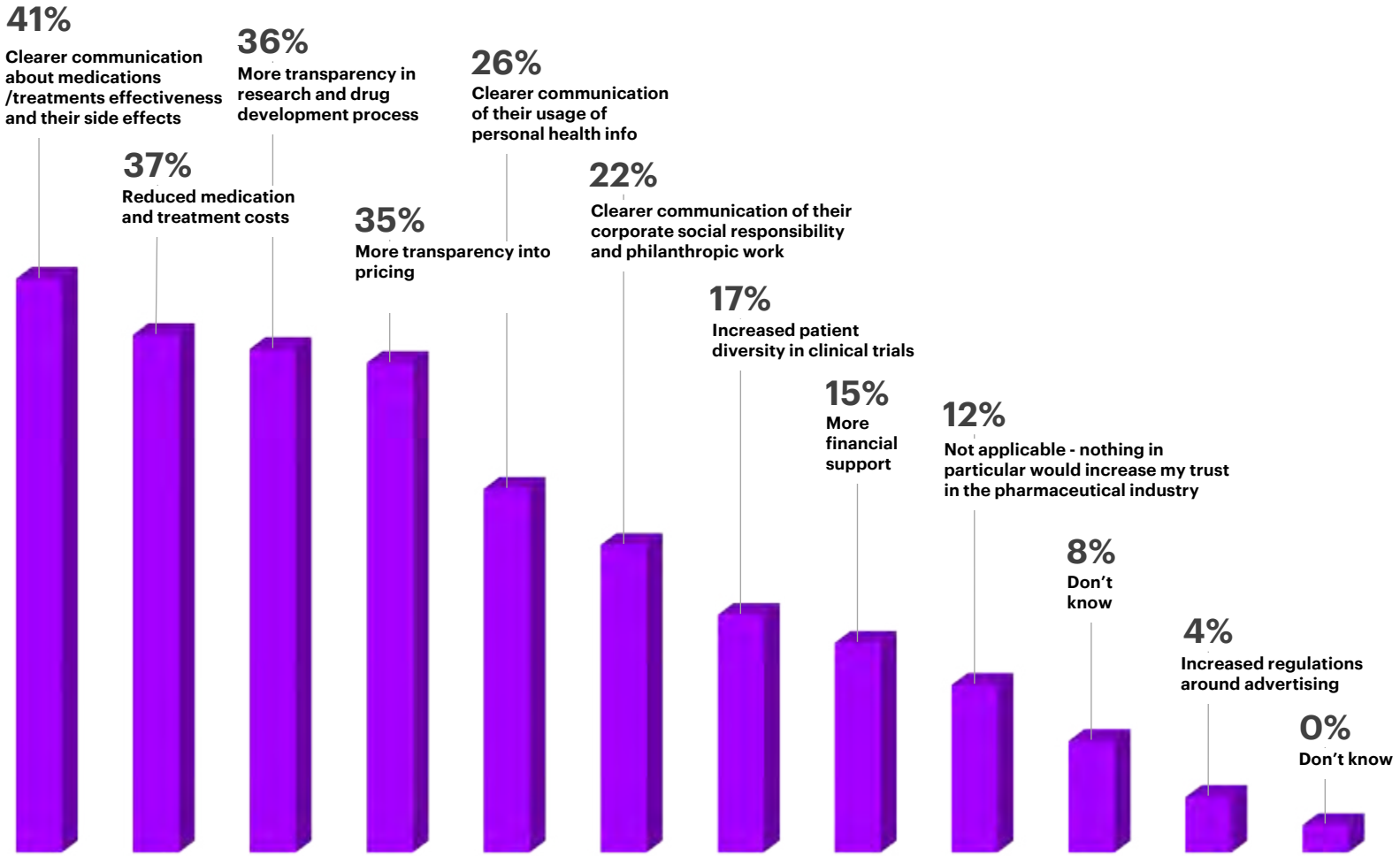
When asked what would make them more likely to use digital technology to manage their health, respondents cited more confidence in data security and privacy (29%); recommendations from their medical provider (31%); and receiving better information about their health (32%).Once trust in data security and privacy has been earned, people would use digital technologies and therapeutics for several reasons—especially convenience, and to learn more about their health.

How pharma companies can grow trust

When asked what would increase their trust in pharma companies, the top responses were mostly centered on clearer communication and greater transparency with respect to medications, treatment effectiveness and their side effects, reduced medication and treatment costs as well as more transparency into R&D and pricing (see figure 6). Surprisingly, only 26% of respondents ranked clearer communication about how personal health information is used as a factor to increase trust—despite it being a top response for other questions.

Figure 6. Clarity, reduced cost and increased drug development transparency are trust builders for pharma companies

Which, if any, of the following would increase your trust in the pharmaceutical industry? Select all that apply



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Pharma companies increasingly leverage patient data to improve patient outcomes, giving back to the patient. They build trust by providing better, personalized, actionable information to patients, who increasingly expect disclosure of how their data is used in regulatory submissions, or to develop new treatments.

First and foremost, patients expect to be asked for consent to use their data. The relationship needs to be reciprocal. Patients want to know how their data is improving care for themselves and others—and the data confirms it. Respondents would allow their medical providers to share their personal health information with pharma companies to improve their health and the effectiveness of medications (45%); to gather evidence about medication/treatment efficacy (38%); to develop new medications and treatments (36%); and to better understand their health (35%), while just 19% said they would never consent to sharing their personal health information. Therefore, any investments in digital solutions must be backed by evidence, endorsed by the clinician community and measured in an ongoing manner to demonstrate the real-world impact, just like we do for other treatments.

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THE VISION: EQUITABLE ACCESS FOR ALL

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The vision: equitable access for all

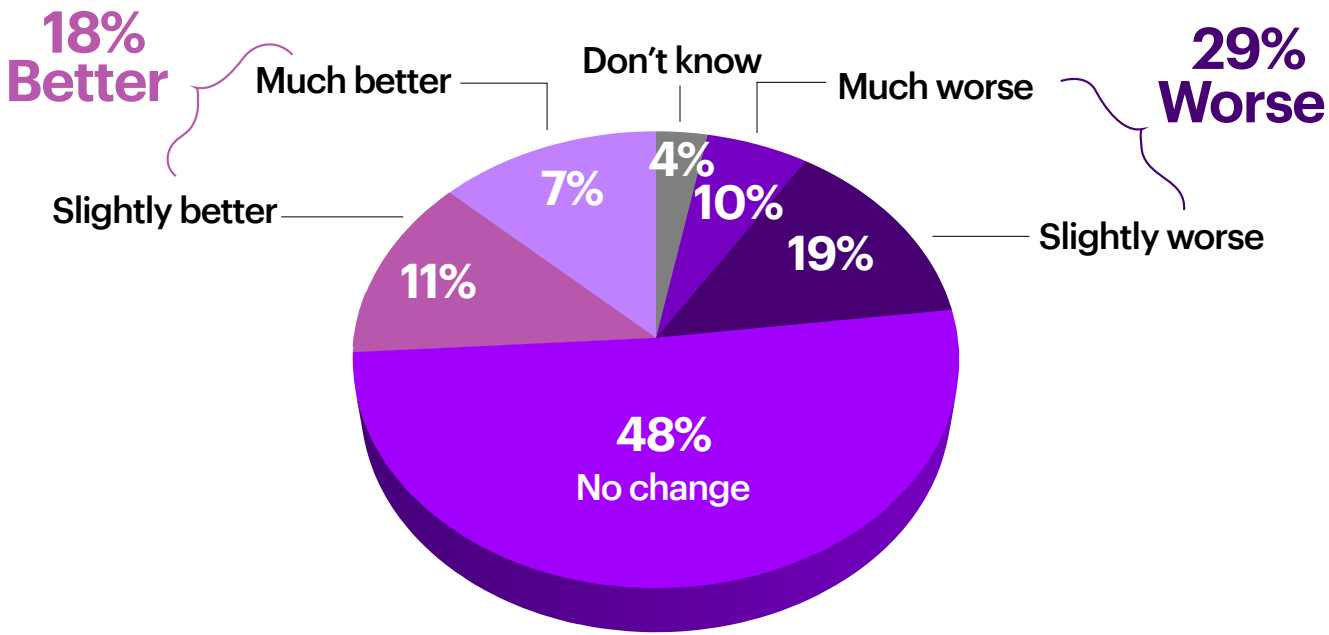
Healthcare ecosystems across the world were tested in ways we never imagined possible since last year. Overall, they showed resilience and the majority of people had the same as, or even better access than before the pandemic—while a third reported worse access (see figure 7).

A great healthcare experience definitely features equitable access, because limited access to healthcare often has serious consequences. When people can't afford care, for example in countries without public funded healthcare systems, they are more likely to resort to behaviors that save money but could jeopardize their health. Those who struggle financially might replace prescribed treatments with over-the-counter medication, skip an appointment with a medical provider or delay treatment or medication which can possibly lead to more severe illness or, in the worst-case scenario, be life-threatening (see figure 8).

As the healthcare system moves towards greater patient centricity, biopharma can increase care access equity by transforming patient engagement processes to address patients' needs, preferences and values holistically and sustainably. Existing patient assistance programs (like discounts) aren't enough. Companies can help patients manage their lives based on social determinants of health. Community service partnerships can be grown and refined to raise awareness, improve engagement and develop innovative "beyond the pill" services that truly engage patients.

Figure 7. Healthcare systems proved resilient in the accessability of their care since the onset of the pandemic

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



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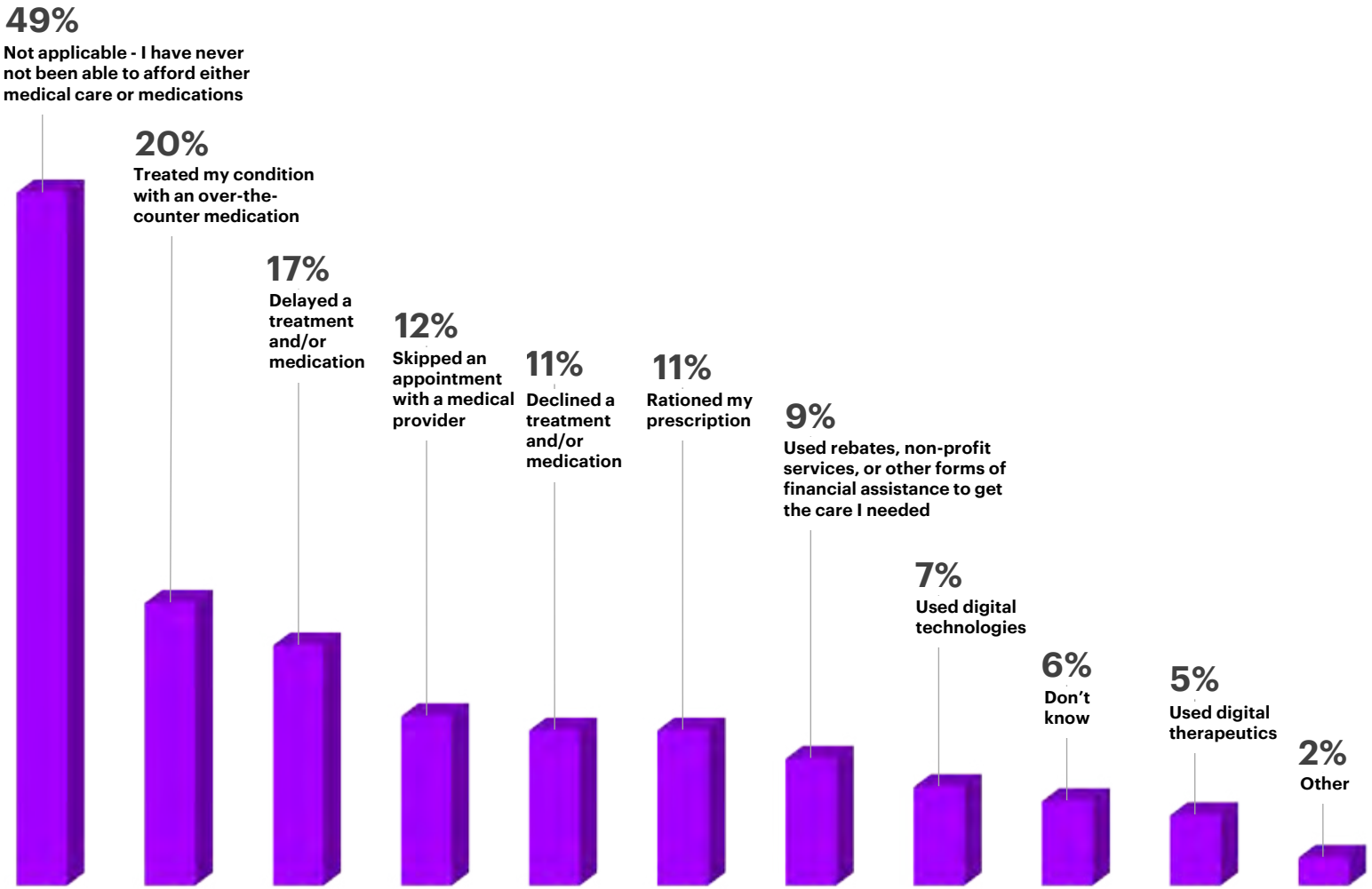
Greater access equity also means that more people benefit from preventative care measures like health check-ups. These still seem to be exclusive to certain parts of society. The perceived high cost of these healthcare services causes many people to skip regular health checkups and screenings, which can lead to undetected illnesses in the long run. Our survey found that 61% of people would consider using these services if provided at a lower than current price point, or if provided for free. Greater and even free access to preventative measures makes sense financially: Public health systems could save significant costs as prevention and early treatment of illness is always less costly than curing advanced diseases.

Figure 8. Affordability issues can have severe consequences for either medical care or medications

Which, if any, of the following have you ever personally done when you could not afford either medical care or medications?



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Recommendations

The pandemic has left a lasting impression on healthcare across the globe, and our 2021 Health and Life Sciences Experience Survey has confirmed the need for human-centric and personalized healthcare.

In other words, care that takes into account the need for emotional support, ease of access, the need for patient trust and equitable care for all. In a sense, one could say that the need for good bedside manner has been extended beyond the bedside, to aspects like the use of technology in care, and the need to extend care to a range of age groups and demographics. The most important factors for a positive healthcare experience are:

- A combination of empathy from their healthcare provider (clear explanations of conditions and treatments, while listening, understanding needs and providing emotional support) and well-coordinated care
- Logistics (collaborative communications between medical providers and their personnel, efficient visits and nice and helpful staff)—all built on foundation of technology whose adoption is driven by increased patient trust
- Ensuring any investments in digital solutions are backed by evidence, supported by the clinician community and measured in an ongoing manner to demonstrate the real-world impact
- Recognition that positive experiences play a role in the sustainability of the business

Healthcare executives can lead with people first and use digital technology to make healthcare experiences simpler, more coordinated, more empathetic and, ultimately, more effective.

When it comes to patients' attitudes towards biopharma, some gains have been achieved in terms of trust, but more action is required. Many respondents said they would have more trust in pharma companies if they were more transparent about the drug development process—and the same number said they would have more trust if pharma companies clearly communicated the effectiveness and side effects of medications. This tells us that people see solutions for a more positive relationship.

We believe that the sharply different trust levels among the ecosystem of players as reported by our sample, is a major limitation for the adoption of digital health technology among patients. Our research shows that improving care will require better collaboration and trust-building between all relevant parties. If people are expected to share their data through digital tools for medical research, they need to trust and have confidence in the entire system, not just the provider they share data with—since they expect that data will flow between players anyway.

Our survey indicates that people are willing to share their data for a good reason, such as improving healthcare. Only 20% said they would not share data for any reason. Addressing the potential 80% who seem open to sharing data in principle in a way that helps them understand how sharing their data benefits everyone, and that they will never lose control of it, will be critical to the advancement of medicine.

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About the 2021 Accenture Health and Life Sciences Experience Survey

Accenture commissioned a survey of 11,823 people aged 18+ to assess their attitudes toward the healthcare system in terms of access, equity, service experience, digital technology adoption and trust. The online survey included people across 14 countries: Australia (649), England (1,200), Finland (662), Germany (872), France (822), Italy, (718), Ireland (657), China, (806), India (873), Norway (648), Singapore (653), Spain (675) and the United States (1,755). Forty percent of the sample represent patients with current conditions in the following therapeutic areas: Oncology, Cardiovascular, Respiratory, Immunology, Gastroenterology and Neurology. The sample includes a range of age groups: 10% Gen Z (ages 18-24), 32% Millennials (ages 25-41), 23% Gen X (ages 42-56), 30% Baby Boomers (ages 57-74), and 5% of those ages 75 or older. The survey was fielded and analyzed during May and July 2021.

Thanks to **Oxford Economics** for its assistance in developing the survey, analyzing the data, and establishing key narratives.

Thanks to **YouGov** for carrying out the fieldwork.

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