

Is digital the prescription for improving health?

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While a good digital strategy looks across the entire digital value chain, there are some particular areas that will reap immediate benefits.

A digital investment in one area, customer satisfaction, where health has traditionally lagged other sectors (particularly retail), can help companies capture value and increase consumer engagement. The opportunity to self-disrupt is rapidly coming to an end: new entrants from tech and other sectors have announced their intentions to reshape our notions of health and care delivery.

In early 2018, EY conducted a survey of 2,455 consumers, 152 physicians and 195 executives in the US to get a better understanding of consumer and practitioner beliefs and attitudes toward technology and how it might improve health and the patient/practitioner interaction.

Below are some high-level findings:

- ▶ **Consumers have a more holistic view of health, one that encompasses social, financial and mental well-being.** Engagement with digital technology for health is gaining momentum, driven by a desire to improve wellness and underpinned by convenience. Technology is seen as one of the key enablers of seeing health as a lifelong journey. Our survey found that consumers are hungry for an easier, more convenient experience, and many of them (56%) have used some form of tech to interact with care providers.
- ▶ **There is widespread agreement among physicians that healthcare digital technologies will contribute effectively to the overall wellness of the population.** Doctors still only receive a small amount of information about us compared with the rich story our genes and environment can tell. Physicians see connected sensors that can provide regular biometric data and in-home genetic testing as a door to a broader understanding of their patients.
- ▶ **Americans are open to sharing a range of health-related information with physicians, including medical history – but still report hesitation over sharing some types of data.** Activity and lifestyle data have the opportunity to augment our medical snapshots by providing more context and insight about the number of small, health-impacting decisions we make every day outside of the doctor's office.
- ▶ **We know that incentives for sharing are crucial.** People still report concern over privacy but also indicate the right levers can encourage them to share. Sharing data to improve convenience (wait times) trumps cost savings (61% to 55%). Sharing lifestyle information becomes more palatable (74% agree) if it is seen as a way to help physicians treat people more comprehensively. Curiosity is a powerful motivator; some would share dietary and exercise information if they could receive tailored information back.
- ▶ **The comfort and reassurance of human interaction when seeing a doctor is a big part of what people are looking for when they are sick.** Particularly in the short term, technologies that seek to augment, rather than replace the physician/patient interaction, are a good foot in the door. This is an easier sell to physicians, too, who already feel overburdened with tasks that they feel limit their chance to interact with patients and offer little value.

