

The health fix: How COVID-19 has transformed consumers' attitudes to health and accelerated the future of digital healthcare

The current health crisis is a wake-up call. Even in a global society that has seen significant advances in technology and healthcare, COVID-19 threatens the physical health and emotional well-being of us all.

This realization has consequences for how consumers view their own health and how they plan to safeguard it and it is leading to fundamental shifts in behavior. For example, recent research we conducted into consumer behavior in consumer products and retail found that 77% will be more cautious about their health once the pandemic is over.¹

To take a deeper look at this issue, this research explores the health-consciousness of consumers and how the pandemic has changed their attitudes, expectations, and how they reach health decisions. How do consumers view their physical and mental health today? How open are consumers to using digital technologies to manage their health? What changes have Empowered Consumers made to be more proactive about taking care of their health?

To answer these questions, we surveyed over 2,000 consumers across four countries – France, Germany, the United Kingdom, and the United States – in mid-June 2020.

In this research note, we explore the following key findings:

1. Millennials are more worried about their health today than any other age group.
2. Home is the new point of care – consumers increasingly demand digital health and low-touch healthcare options.
3. Empowered Consumers are more willing to embrace technology and low-touch healthcare.

Executive Summary

The COVID-19 pandemic has transformed consumers' attitude towards health within a span of a few months.

The pandemic has exacerbated consumer concerns over their physical and mental health. More so for younger age groups and consumers managing a chronic disease. In our survey, millennials and Gen Z are most concerned about their mental health today, but all age groups have seen an upward shift in their level of worry from before the pandemic.

At the same time, mode of care has undergone a sea change; home is the new point of care. In our research, consumers expressed rising interest in, and adoption of digital health technologies to access care and manage their health. They also reveal a strong appetite for low-touch care options. Life sciences companies and healthcare providers have already launched a slew of innovations to meet this demand: from telemedicine and connected devices to virtual trials and fitness and wellness apps. Different technologies have been cobbled together during the pandemic to meet the surge in demand for low-touch and touchless care. There is an urgent need for a holistic platform that meets patients' needs throughout the patient journey, from gathering research, symptom tracking, diagnosis to treatment and disease management.

Empowered Consumers – a segment of consumers in our survey who take proactive steps to manage their health – are more willing to embrace technology than ever before. Empowered Consumers are more likely to place higher trust in technology to manage their care and they are taking steps to limit touch-based interactions. For example, over half (53%) of Empowered Consumers stated that they would use technology to access healthcare remotely, compared with 36% of non-empowered consumers. In addition, nearly half (45%) of Empowered Consumers would be hesitant to begin a new treatment or continue their current one because it could be a risk to their immune system, as compared with only 30% of non-empowered consumers.

As a result of these profound shifts, healthcare ecosystems around the world will change drastically over the next few years. All stakeholders – pharmaceutical companies, payers, healthcare providers, medical devices manufacturers, technology companies, regulators – need to collaborate to improve and transform the patient journey and the patient experience through digital and low-touch care delivery, while improving outcomes.

Millennials are more worried about their health today than any other age groups

With the first pandemic in nearly a century, it is not surprising that consumers feel mounting concern for their own physical and mental well-being. In May, health experts from the United Nations warned that a mental health crisis was looming as millions of people worldwide are surrounded by death and disease and forced into isolation, poverty, and anxiety by the pandemic.² Devora Kestel, director of the World Health Organization’s (WHO) mental health department said:

“The isolation, the fear, the uncertainty, the economic turmoil – they all cause or could cause psychological distress.”³

All age groups are concerned that their physical health will deteriorate

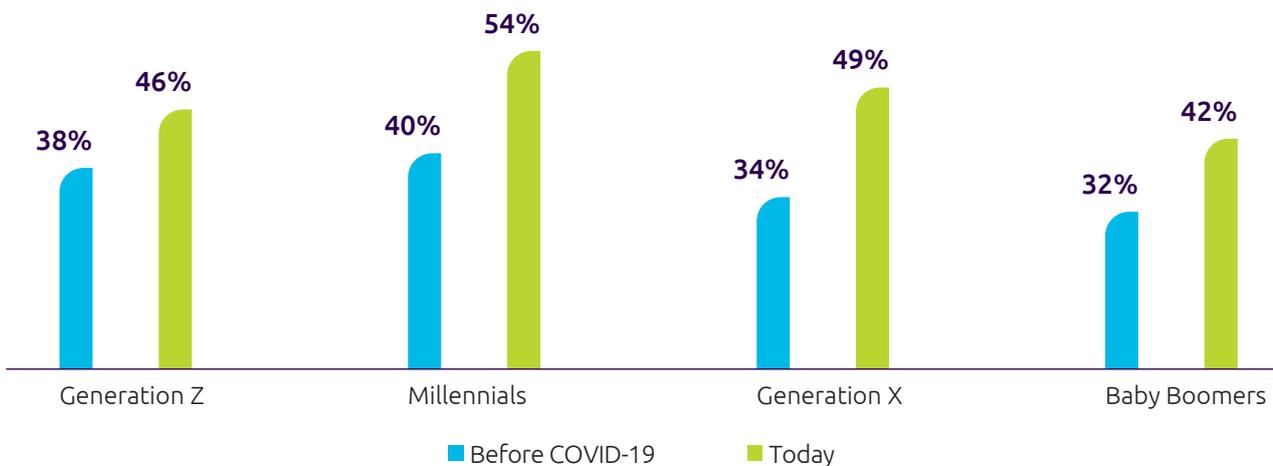
COVID-19 has made us all health conscious and exacerbated people’s feeling of vulnerability and anxiety. Forty-seven percent of consumers in our survey say they are worried about

their physical health deteriorating today, up from 35% before the pandemic. This rises to 62% among consumers with a chronic disease and 53% for consumers who have a child living with them.

When we look at the position by age, we find that millennials are particularly concerned today about their physical health (see Figure 1). In fact, concerns are highest among millennials than Gen X or baby boomers, despite the fact that COVID-19 has traditionally been seen as a particular threat to older people, especially those with underlying health issues. This reflects the fact that there is growing understanding of the significant threat to younger adults too.⁴ A greater share of millennials in the US are worried than their peers in other countries (59% in the US versus 43% in France and 49% in Germany). Furthermore, worry is higher for male millennials today than for females (63% versus 47%).

Figure 1: Millennials are most concerned about their physical health deteriorating today

Percentage of consumers by generation that agree with the statement: “I’m worried about my physical health deteriorating”



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers.

*Generation Z is aged 18 to 22, millennials is aged 23 to 38, Generation X is aged 39 to 54, and Baby Boomers is aged 55 to 75+ in our research.

Younger people are most worried about their mental health

People’s mental outlook can be affected by COVID-anxiety: fear of becoming ill, the inability to see loved ones, and worries about childcare, jobs and finances. In the US in April 2020, a federal emergency hotline for people in emotional distress saw a more than 1,000% increase in calls compared to the same time last year.⁵ Talkspace, an online therapy company, reported a 65% jump in clients between mid-February 2020 and May.⁶

Our research found significant concerns among consumers. Over a third (35%) today say they are concerned that their mental health will deteriorate, up from 26% before the pandemic. This is in line with recent data from the US Census Bureau, which found that one-third of Americans now exhibit signs of clinical anxiety or depression. This is double the amount of previous years.⁷ Those concerned with mental health today rise to 43% among consumers with a chronic disease.

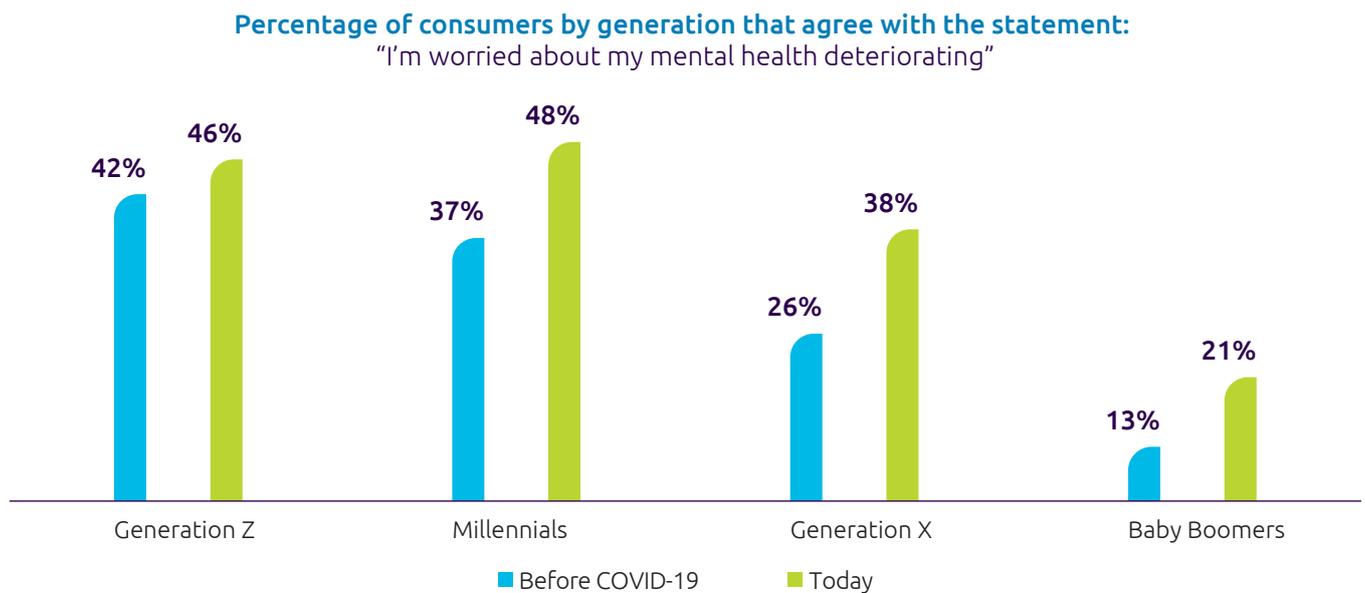
By generation, millennials and Gen Z are most concerned about their mental health today and Gen X saw the greatest increase from before COVID-19 (12%) (see Figure 2). Male millennials (54%) are more concerned today about their mental health than females (42%).

Concern trends downward in subsequent age groups. This is perhaps a result of the fact younger people have had greater exposure to mental health awareness and its de-stigmatization in more recent years. This lack of awareness and acceptance among older generations is supported by the fact that depressive disorders are often untreated or under-treated among older adults.⁸

Action points for life sciences and healthcare organizations:

- **Put a renewed emphasis on health outcomes.** Given the challenges facing healthcare systems today, it is important for life sciences companies and national healthcare providers to maintain their focus on improving outcomes, such as patient satisfaction, adherence, and hospitalization rates. In fact, there is an emerging need “beyond the pill”

Figure 2: Millennials are most concerned about their mental health deteriorating today



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers.

*Generation Z is aged 18 to 22, millennials is aged 23 to 38, Generation X is aged 39 to 54, and baby boomers is aged 55 to 75+ in our research.

and life sciences companies and healthcare providers are well-positioned to respond by focusing more on prevention. For example:

- Pharmaceutical companies can tap into their health economics and outcomes research (HEOR) – which links clinical research to real-world health outcomes – to help healthcare providers make more informed decisions on treatment options and cost.
- National healthcare providers can work collaboratively with community service, public health, social work, and public safety organizations to share data and better understand whether health systems are meeting the needs of the population. The UK’s National Health Service (NHS) includes an objective to improve population health as part of its Long Term Plan, focusing on predicative prevention and early diagnosis.⁹
- Pharmaceutical companies can develop tools for healthcare providers that allow them to monitor whether COVID-19 patients with underlying health conditions are adhering to their treatments.

• **Partner with telemental health startups.** The isolation and economic uncertainty unleashed by the pandemic are driving demand for mental health services. Pharmaceutical companies, consumer health firms, and national healthcare providers should consider partnership opportunities to improve patient outcomes and build direct patient

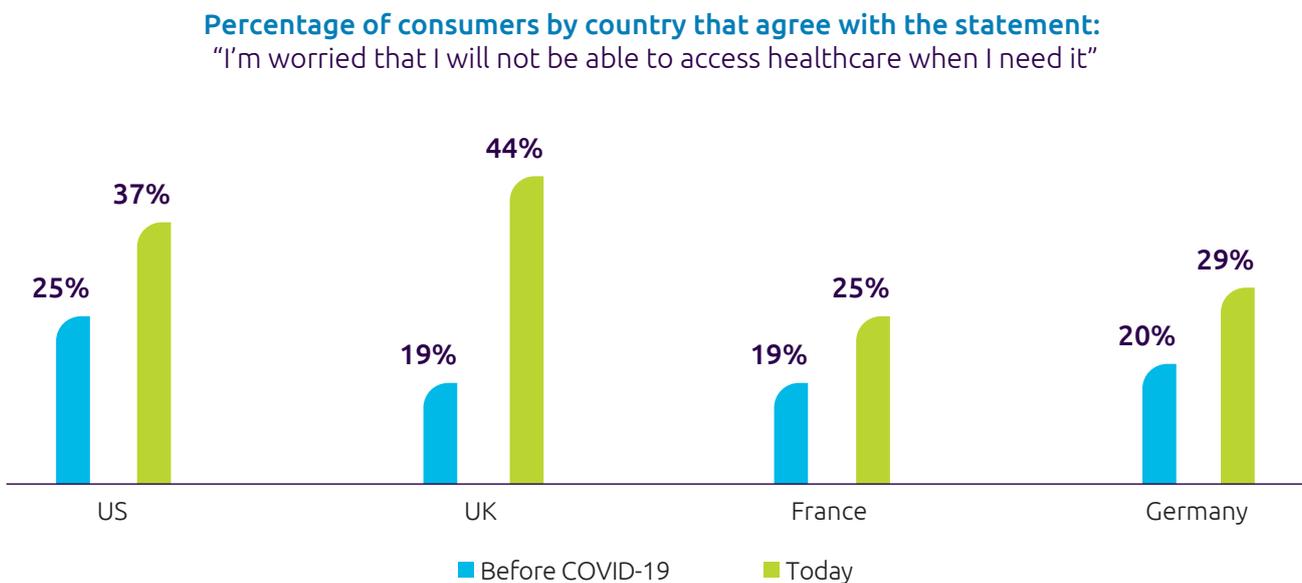
connections, especially among the millennial audience. Downloads of mental health apps hit 4 million in April alone – up 29% from January.¹⁰ Some US payers have ensured their members can access mental health services digitally. For example, in May, health insurer Cigna partnered with behavioral therapy startup Talkspace to offer digital therapy services to its members.¹¹ Kaiser Permanente partnered with Livongo to offer its virtual behavioral health therapy services in April.¹² German digital mental health startups, HelloBetter and Selfapy, offered free access to hotlines, guided programs, coaching, and other services during COVID-19.¹³

Access concerns are worrying consumers

Our research found that access to healthcare is a major concern for consumers: over a third (35%) are worried they will not be able to access healthcare when they need it, up from 22% before the pandemic. Again, it is the younger demographic that is the most concerned, with access concerns hitting 47% for millennials. Among consumers with a chronic disease, 40% are worried about access today.

As Figure 3 shows, the UK has the largest share of concerned consumers. For example, 44% of UK consumers are worried that they will not be able to access healthcare when they need it – the largest age groups in the UK with this concern are Gen X and millennials (55%).

Figure 3: UK consumers are most concerned about healthcare access



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers.

Affordability is a key concern for US consumers

The affordability of healthcare is also a concern for over a third of US consumers today. Thirty-six percent of American consumers are worried about not being able to afford healthcare when they need it today, up from 30% before the pandemic:

- By age group, the most concerned are Gen Z and millennials (48% each), with only 20% of baby boomers concerned.
- Among US consumers with a chronic disease, 42% are worried about affordability today.

Action points for life sciences and healthcare organizations:

- **Make a renewed commitment to improving access at a global level and focusing on affordability in the US specifically.** With hospitals under strain – and people across the world under continuing social distancing and quarantine mandates – patients face substantial obstacles to obtaining healthcare. Moreover, with parts of the global economy shut down, many patients may have trouble affording their medications due to loss of job or income. Pharmaceutical and medical device manufacturers should partner with market access stakeholders to ensure continuity of care for patients during this health crisis and beyond while improving patient outcomes and reducing cost. For example, Novo Nordisk is working to reduce out-of-pocket costs through co-pay assistance and patient assistance programs.¹⁴ National healthcare providers can use telehealth and virtual medicine – which we discuss in greater detail in the following section – to expand access to essential healthcare during this health crisis.

Action points for healthcare providers:

- **Implement a data-driven approach to broaden access to care.** To improve health outcomes, a proactive approach to managing data is critical. Data from diverse sources such as electronic health records, social health databases, and monitoring devices need to be combined to obtain real-time information on evolving health situations. After the pandemic, many healthcare systems are expected to remain stretched due to pent-up demand for elective surgeries and urgent care that might have been earlier avoided. National healthcare providers can leverage data to predict demand on healthcare systems and stress-test peak demand during periods such as natural disasters or public health crises, to improve access to healthcare in the future. Furthermore, hospitals should be incentivized based on their actual management of health emergencies. In Germany, for example, financial bonuses were awarded to hospitals

which expanded bed capacity during COVID-19. A website was set up where each hospital updated its available capacity daily for intensive care with respiratory support. This also helped doctors quickly identify alternative places for treatment.¹⁵

Home is the new point of care – consumers increasingly demand digital health and low-touch healthcare options

Consumer comfort with technology, and trust in it, have increased during the crisis

Amid the pandemic, more consumers have grown comfortable with the use of technology in managing their health, and trust levels have therefore also climbed:

- Forty-six percent of consumers are comfortable with the growing use of technology for managing their health today, and 43% trust the use of technology, compared with 38% for both areas before COVID-19 (see Figure 4).
- Millennials have the highest levels of comfort and trust today (56% and 52%, respectively).
- The level of comfort and trust has increased across all age groups, from today versus before the pandemic. However, overall today, comfort and trust levels trend downward with age. For example, 46% of Gen X trust technology today versus 32% of baby boomers.

56% OF MILLENNIALS ARE COMFORTABLE WITH USING TECHNOLOGY TO MANAGE THEIR HEALTH TODAY

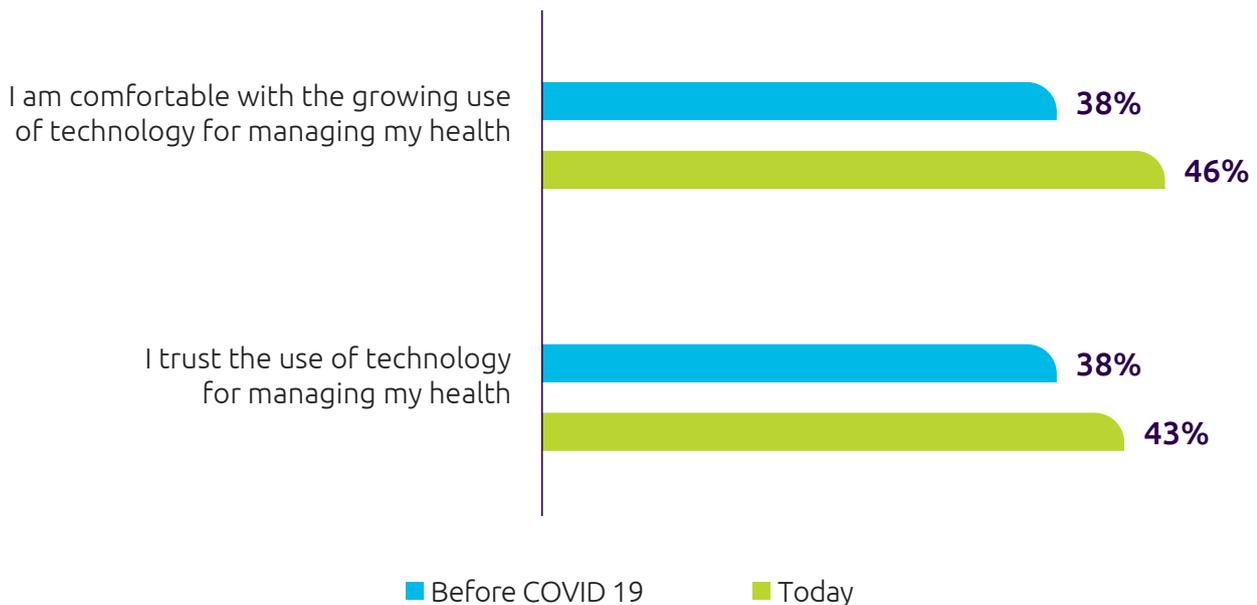
- By country, the level of trust today is highest among US consumers (46%). UK consumers show the biggest growth increase from before the pandemic to today, climbing from 31% to 43%.
- Consumers with a chronic disease are more comfortable with, (51% versus 43%) and trusting of (49% versus 39%) technology than consumers without a chronic disease.

Consumers are taking actions based on their growing readiness to adopt technology:

- Approximately 44% are willing to share their health data to benefit new therapies.
- A third of consumers would prefer healthcare providers that use digital technologies (e.g., virtual bookings and consultations, remote medical monitoring, online access to test results) over ones that do not.

Figure 4: The level of comfort with and trust in technology for managing health has increased during this health crisis

Percentage of consumers that agree with the below statements



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers.

44% OF CONSUMERS ARE WILLING TO SHARE THEIR HEALTH DATA TO BENEFIT NEW THERAPIES

Consumers increasingly prefer low-touch health services

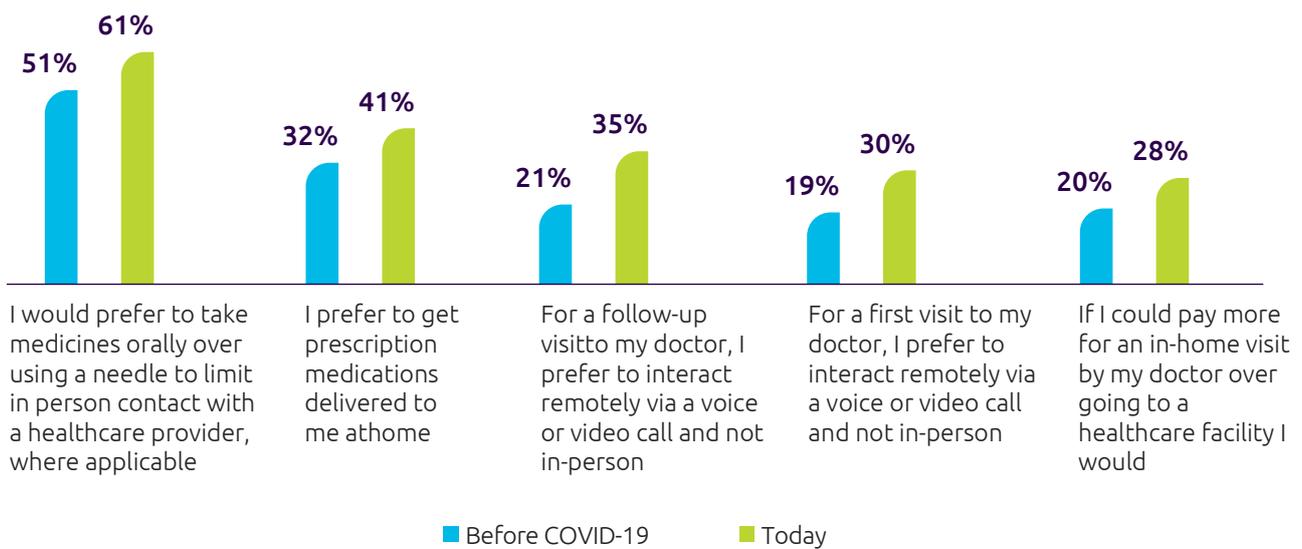
Consumers' fear of contracting an infection during the pandemic, as well as limited resources at healthcare facilities, are likely driving demand for low-touch health management options. Forty percent of consumers stated that they would use technology (e.g., smartphones, tablets, and computers) to access healthcare remotely today versus 29% before COVID-19.

Throughout different aspects of the patient journey – from diagnosis to treatment to disease management – consumers increasingly prefer touchless or low-touch options. More consumers today prefer to:

- Interact remotely with their doctor
- Take oral medicines over an injectable
- Have prescription medication delivered at home
- Pay more for an in-home visit by doctor if they could (see Figure 5).

Figure 5: More consumers now prefer low-touch medical care

Percentage of consumers that agree with the below statements



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers.

Consumers are still hesitant to begin new treatments or elective surgeries given the threat of COVID-19 and desire to minimize contact with healthcare providers:

- Forty-two percent of consumers say they would cancel an active treatment or postpone a scheduled one, unless it is essential.
- Half of consumers would be hesitant to have a non-essential surgery because exposure to a healthcare facility can affect their health.

Consumers who are most worried about their mental health are more interested in low-touch care:

- Use technology (e.g., smartphones, tablets, computers) to access healthcare remotely (61% versus 40% of all consumers).
- Prefer remote interaction with doctors for their first consultation (53% versus 30% of all consumers).

Action points for pharmaceutical organizations:

- **Embed virtual interactions into clinical trials.**

Pharmaceutical companies need to transform their clinical trials to virtually connect with patients. This will involve areas such as using data science to recruit patients for clinical trials, securing e-consent for trials, and delivery of clinical study drugs to home. For example, Sanofi is making it easier for patients to participate in clinical trials through telehealth, home delivery, digital tools, e-consent, and patient portals.¹⁶ *“Digital endpoints and remote monitoring are being test-driven out of necessity during the crisis, but will be one of the positive legacies,”* said John Tsai, chief medical officer at Novartis, whose trials have included nearly 100,000 remote monitoring visits over the course of April and May.¹⁷

- **Innovate to minimize or eliminate touch-based care.**

Pharmaceutical companies need to rethink mechanism of delivery and opportunities to change the treatment pathway to limit touch-based care, putting the patient more at ease. For example, replacing an infusion with an in-home injectable or delivering chemotherapy in home. This approach is also more patient centric. For example, Johnson & Johnson innovated the formulation of its cancer drug Darzalex and reduced multiple-hour infusions and chair time to a 3 to 5-minute injection, making it more patient-friendly.¹⁸ Pharmaceutical companies should also scan health technology startups to identify new technologies and partnerships for more contactless care.

Action point for medical device manufacturers:

- **Tap new opportunities outside of the hospital system.**

During this crisis, many patients prefer to receive medical care outside of hospital systems to reduce the risk of infection. Medical device manufacturers in particular might need to review their portfolio of offerings to serve healthcare providers outside of hospitals, such as ambulatory surgery centers (ASCs). Suketu Upadhyay, chief financial officer at Zimmer Biomet, a medical devices manufacturer said: *“10% to 20% of our business is done outside of a hospital system and in more of an ambulatory, urgent, or a specialty setting. We have a broader ASC strategy and roadmap that we’re implementing.”*¹⁹

Action points for healthcare providers:

- **Redesign hospitals to reduce contact.** National healthcare providers should work to reduce unnecessary physical contact with patients. Within hospital settings, providers can take steps to reduce the number of interactions with people with new protocols, such as:

- Flexible staffing and more generalist roles to reduce the need to see multiple specialists
- Creating zones within hospitals to identify areas with the greatest risk of infection
- Reducing or removing communal areas
- Increasing handwashing stations.

Public Health England (PHE), an agency of the Department of Health and Social Care in the UK, has adopted a new workforce management system to support their operation as they rapidly scale up their teams in response to the COVID-19 pandemic. The technology offers a “touchless clock-in” for staff, which enables them to register for work without touching a screen.²⁰

- **Scale technology solutions for care management at hospitals.**

Hospitals need to implement and scale technology solutions to minimize touch-based interactions. For example, Spain’s Hospital Cima Sanitas Barcelona has piloted multiple projects of this type. They include auto check-in and geolocation inside the hospital, telemonitoring patients with wearables, a video-consultation platform and chat with healthcare professionals, chatbots, and the use of tablets in the hospital rooms.²¹

More consumers rely on healthcare technologies in their daily lives

Consumers are embracing technology to manage their health. There is an increasing appetite for using apps, websites, and online forums and a growing number of consumers ready to buy health gadgets. The upward trend is consistent across all age groups. Notably, for older consumers, the growth from before COVID-19 to today is much higher.

- For example, among Gen Z consumers, the increase in preference for using apps/websites to gather health information was only three percentage points (from 41% before COVID-19 to 44% today).

61% OF CONSUMERS WOULD PREFER TO TAKE MEDICINES ORALLY TO LIMIT IN PERSON CONTACT

- This preference grew 11 percentage points to 51% today among Gen X (see Figure 6).

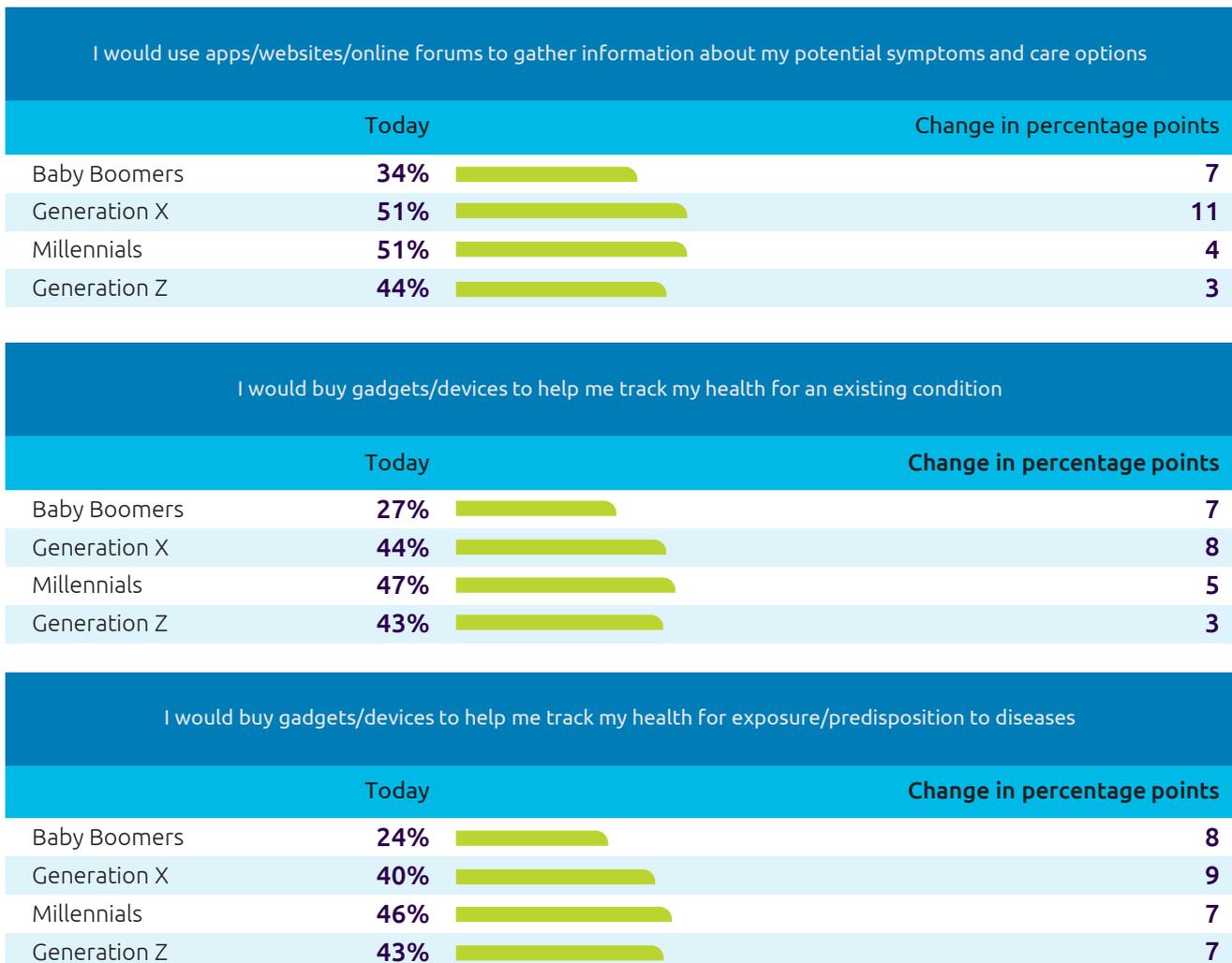
Consumers who are most worried about their mental health are more interested in using digital to manage their health:

- Go online to gather information about symptoms and care options (65% versus 44% of all consumers)

- Buy gadgets/devices to track health for an existing condition (60% versus 38% of all consumers)
- Track their health for predisposition/exposure to medical conditions (57% versus 36% of all consumers).

Figure 6: Older consumers' preferences on the use of health technology have changed the most from before COVID-19

Percentage of consumers that agree with the below statements today and change from before COVID-19 by generation



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers.

*Generation Z is aged 18 to 22, millennials is aged 23 to 38, Generation X is aged 39 to 54, and baby boomers is aged 55 to 75+ in our research.

As the digital health ecosystem continues to develop rapidly, many of these changes in consumer health behaviors are likely to last beyond the current health crisis. *“I see a major increase basically everywhere when it comes to telemedicine. And I see an increase in the preparedness to share data... with the apps used now during the COVID-19 crisis, and that hopefully will apply to other disease areas as well. And another phenomenon that you’re going to see is new players have entered healthcare – tech players for example – and I don’t think they are competition. I think these are great partners to collaborate with,”* said Dr. Alan Hippe, chief financial and IT officer at Roche.²² Furthermore, digital health ventures attracted over \$3 billion in funding in the first quarter of 2020, its strongest start ever.²³

Regulations are easing too. Governments in various countries are accelerating related reforms to encourage the use of virtual health tools during this pandemic. For example, the US government expanded Medicare coverage and reimbursement for telemedicine consultations over video.²⁴ In one week in April, almost 1.3 million members received telehealth services, compared to just 11,000 in a week in March before regulations relaxed — an increase of more than 11,718% in just a month and a half.²⁵ Similarly, France lifted the restrictions on the use of telemedicine, such as full reimbursement instead of the usual 70% or waiving of the requirement to see a doctor at least once in the year preceding the teleconsultation.²⁶ The German parliament recently passed the Digital Healthcare Act to support digital innovation in healthcare. Provisions include, “fast track” market entry of medical apps, reimbursement of telehealth consultations, and easing access to patient data for research institutions.²⁷ Governments in other countries need to clarify reimbursement procedures for virtual solutions in the longer term to encourage digital investments and innovation in life sciences and healthcare.

Action points for pharmaceutical organizations:

- **Prepare infrastructure to support the patient journey virtually.** There is a threat of future waves of COVID-19, suggesting that health infrastructure will remain burdened. Life sciences companies will need to invest more in preventive care and also prepare for a “new normal” of virtual – from drug launches to mail order delivery of medications. Thomas Polen, president, CEO, and director at Becton, Dickinson and Co. said: *“Essentially, the whole industry has gone to telesales for the last several months. People are doubling down on how they’re using digital.”*²⁸ Potential areas to now focus investment are:
 - **Using digital to interact directly with patients.** On the commercial side after a product is in market, pharmaceutical companies can use digital to interact directly with patients. Pfizer in partnership with the American Lung Association offers a smoking cessation

- app called Quitter’s Circle containing news, resources, and tips to help smokers successfully quit smoking.²⁹
- **Using digital to enable doctors to support patients remotely.** Pharmaceutical companies need to ensure continuity of care and play a role in supporting virtual interactions between doctors and patients. Bausch Health, a Canada-based pharmaceutical and medical devices company, launched its telemedicine platform, Dermatology.com in February. It enables patients to consult with a health care professional and order a prescription on demand for many of its branded dermatology products.³⁰
- **Delivering medicines to home.** In our survey, 52% of millennials expect to order medications online after the pandemic. Pfizer is sending more medicines directly and extended shipments from 30-day to 60-day supplies during the pandemic for high-risk patients.³¹

Action point for healthcare providers:

- **Focus on digitalization investments among national healthcare providers.** With technology-dependence on the rise, the need for public healthcare systems to be digitalized is higher than ever. The pandemic put pressure on hospital infrastructure and forced healthcare systems to rationalize, become more efficient, and alter how they deliver non-critical care. Hence, the increasing need for digital transformation across the patient journey. Even before the implications of the pandemic emerged, countries were on this path. In November 2019, the German parliament agreed to pass the new Digital Care Act. This will help ramp up healthcare facilities through digital innovation replete with online video consultation, access to secure health data networks, and the ability of doctors to prescribe digital health applications.³²

Action points for life sciences, medical device, and healthcare organizations:

- **Create an integrated healthcare platform.** Findings from our research suggest that COVID-19 has increased the willingness of consumers of all ages to embrace digital healthcare for services such as telehealth, virtual consultations, and remote monitoring. Organizations experimented with multiple technologies during COVID-19 but offering an integrated care solution remains a major challenge. There is significant opportunity to foster collaboration across life sciences, healthcare, and technology organizations and to leverage data insights from patients, clinicians, payers, and regulators to create an integrated care ecosystem.

- Collaborate to launch low-or-no-touch products and services.** Life sciences and healthcare companies need to partner with technology companies, startups, and academia to fill gaps in talent and capabilities required for digital health. For example, in February, Johnson & Johnson partnered with Apple to test whether the Apple Watch can help reduce a person’s risk of stroke and detect atrial fibrillation earlier.³³ Life sciences and healthcare companies need to position their portfolios with products featuring low or no touch. Companies that already have such products have witnessed a surge in demand. Abbott Laboratories, for example, reported 60% yearly growth in Q1 2020 for its Libre system – a sensor-based glucose-monitoring tool.³⁴

Empowered Consumers are more willing to embrace technology and low-touch healthcare

The pandemic – and the spread of medical misinformation that has accompanied it – have emphasized the importance of patient empowerment and how the entire healthcare system benefits from it. According to the World Health Organization,

empowerment is defined as “a process through which people gain greater control over decisions and actions affecting their health.”³⁵ Patient empowerment improves health outcomes for the individual but also for society as a whole.³⁶

In our research, we identified a group of “Empowered Consumers” who represent 26% of all consumers surveyed (531 of the total respondents). Empowered Consumers in our research display the following health behaviors:³⁷

- Scheduling regular check-ups proactively
- Conducting their own research to understand an illness or condition they might be experiencing
- Asking probing questions of their healthcare provider
- Actively engaging in their treatment and care plans with their doctor (e.g., side effects, success rate, how it affects daily life)
- Understanding in detail their health insurance plan and its terms
- Seeking a second opinion on an illness or surgery from another doctor or healthcare provider.

Characteristics of Empowered Consumers

Empowered Consumers are more likely than the non-empowered consumers in our research to:

Be older

- 62% are 46 or older (among non-empowered, this drops to 46%)

Live with a partner/spouse or children

- 63% live with a husband, wife, domestic partner, or significant other (drops to 52% for non-empowered) and 31% with children (26% for non-empowered)

Earn high incomes

- 28% have annual household incomes above \$100,000 (17% for non-empowered)

Have better healthcare coverage

- 36% say they are more than adequately covered under their health insurance for their foreseeable medical expenses for the next year (drops to 26% for non-empowered)

Have a chronic disease

- 48% suffer from a chronic disease versus 36% of non-empowered

Be more concerned about their health

- 60% say they are worried about their physical health deteriorating (drops to 43% for non-empowered)
- 41% say they are worried about their mental health deteriorating (drops to 33% for non-empowered)

Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers; N=531 Empowered Consumers.

Empowered Consumers are more willing to embrace digital technology across the patient journey

Self-efficacy – a belief in one’s own ability to effect change in health outcomes – is a critical part of patient empowerment. According to the European Patient Forum, patient empowerment “helps people gain control over their own lives and increases their capacity to act on issues that they themselves define as important.”³⁸ With the increased burden on the healthcare system due to the ongoing pandemic, patient empowerment can be used to reduce illness-related stress. Patients would thus be more self-reliant in managing their own healthcare needs.³⁹

Our research shows greater adoption of digital technology among Empowered Consumers. Increasing rates of smartphone adoption have also contributed towards patient empowerment through easier access to online information, patient portals, and mobile applications:⁴⁰

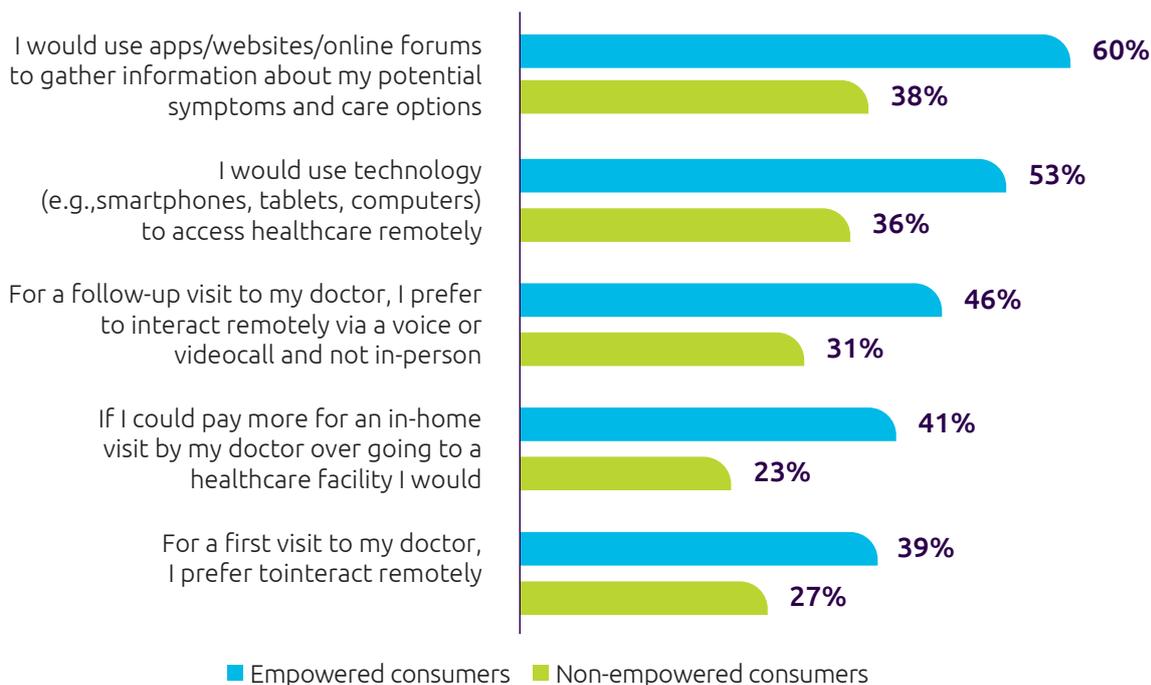
- Over half (57%) of Empowered Consumers are comfortable with the growing use of technology for managing their health versus 42% of non-empowered consumers.
- Similarly, 53% of Empowered Consumers trust the use of technology for managing their health; 40% of non-empowered consumers feel the same.
- Trust is more evident among younger Empowered Consumers – 73% of Gen Z and millennials say they trust technology; only 46% of the Gen X and baby boomers say the same.

Across the patient journey, we observe unique preferences and behaviors of Empowered Consumers as compared to non-empowered consumers.

- Within the **awareness building** and **diagnosis** steps of the patient journey, empowered patients are much more likely than non-empowered consumers to gather information and research their symptoms online (60% versus 38%). A higher share of Empowered Consumers also would pay more for an in-home doctor’s visit (41% versus 23%) (see Figure 7).

Figure 7: The majority of Empowered Consumers will gather information and research their symptoms online

Percentage of consumers that agree with the below statements today: Empowered Consumers versus non-empowered consumers



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers; N=531 Empowered Consumers.

Interestingly, among Empowered Consumers, significant shifts – larger than for all other consumers – have been observed from before the pandemic through today:

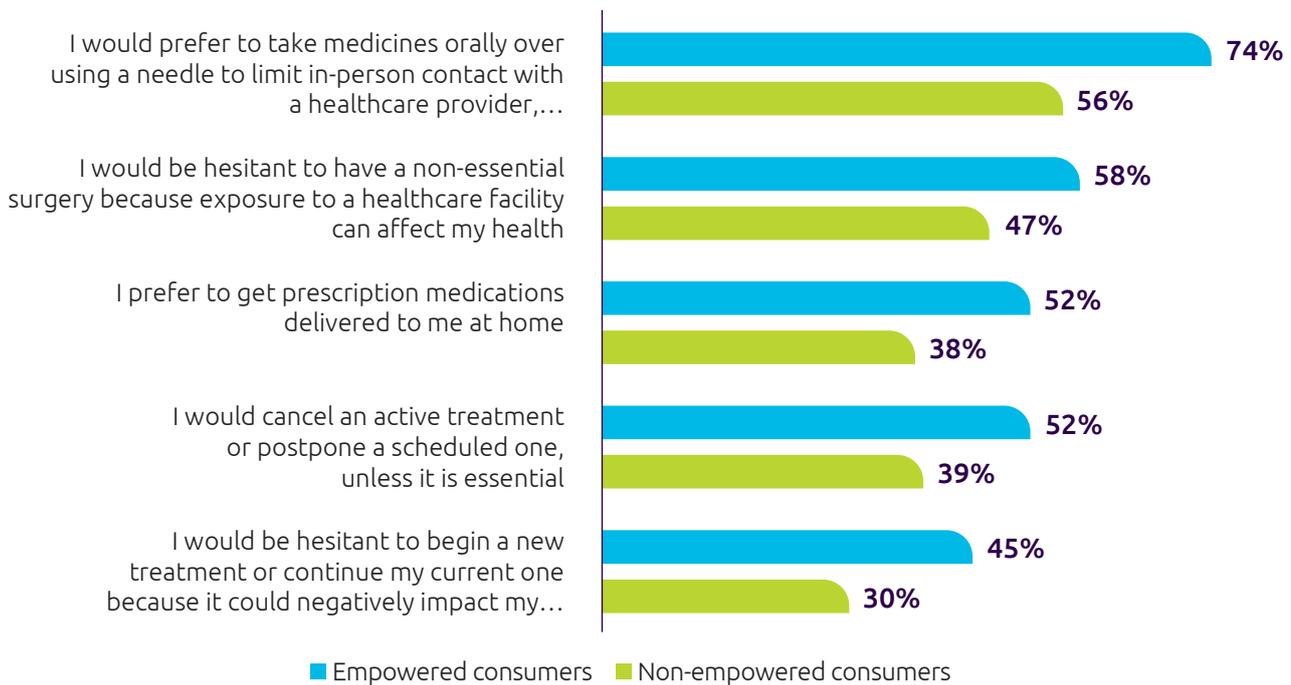
- 18 percentage point increase in preference for remote interaction for a first visit
- 20 percentage point increase in preference for remote interaction for a follow-up visit.

Also, among Empowered Consumers, a few differences have been observed between female and male respondents in current times:

- Men are more likely than women to use technology to access healthcare remotely (58% versus 48%).
- Men are more likely than women to pay more for an in-home visit by the doctor over going to a healthcare facility if they could (46% versus 36%).
- As Figure 8 shows, within the **treatment** phase of the patient journey, empowered patients are much more likely than non-empowered consumers to prefer oral medications to limit contact with a healthcare provider (74% versus 56%).

Figure 8: Three quarters of Empowered Consumers prefer oral medications in order to limit contact with a healthcare provider

Percentage of consumers that agree with the below statements today:
Empowered Consumers versus non-empowered consumers



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers; N=531 Empowered Consumers.

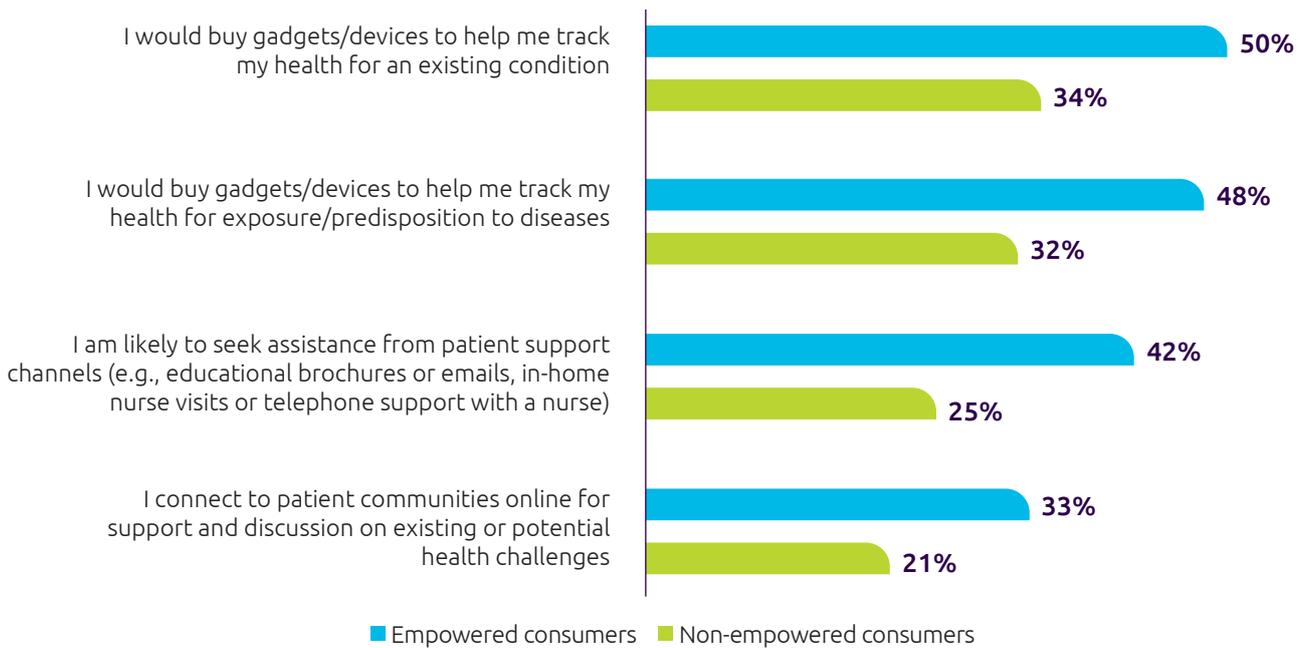
- Within the **disease management** step of the patient journey, our research found that 42% of Empowered Consumers are likely to seek assistance from patient support channels versus 25% of non-empowered consumers (see Figure 9).

Differences exist among Empowered Consumers by gender:

- Men are more likely than women to connect to patient communities online (39% versus 26%).
- Men are more likely than women to buy gadgets/devices to help track their health for exposure/predisposition to diseases (54% versus 41%).

Figure 9: Empowered Consumers are more likely to use patient support channels than non-empowered consumers

Percentage of consumer that agree with the below statements today:
Empowered Consumers versus non-empowered consumers

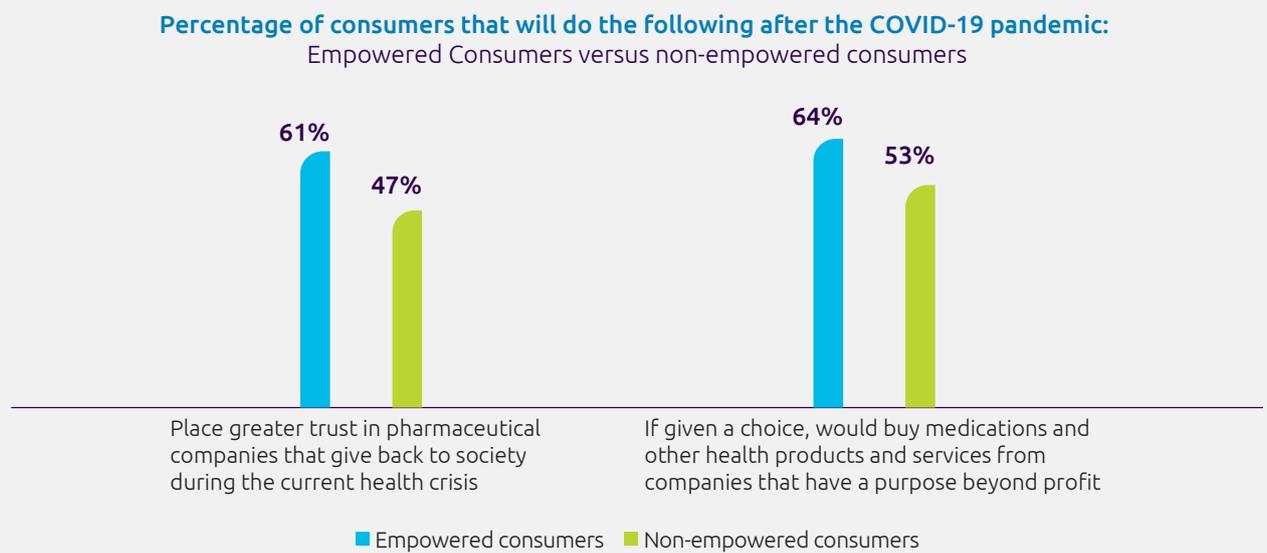


Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers; N=531 Empowered Consumers.

Anticipated behavior of Empowered Consumers after the pandemic

Empowered Consumers are more likely to engage with purpose-driven organizations: 61% say they would place greater trust in pharmaceutical companies that give back to society versus 47% of non-empowered consumers (see Figure 10).

Figure 10: Empowered Consumers are more likely to engage with purpose-driven organizations



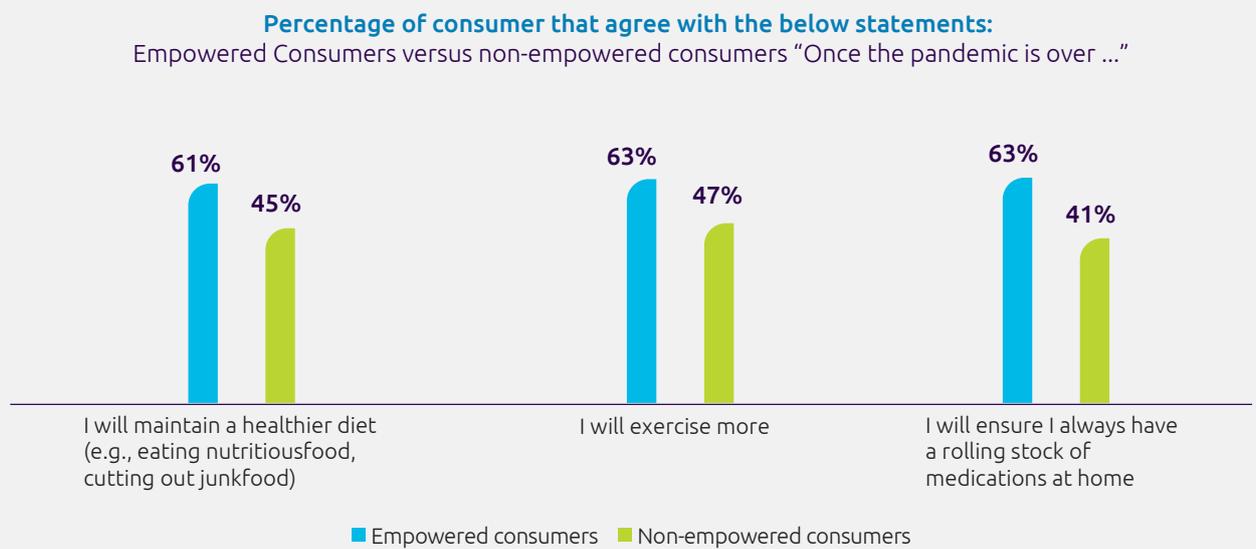
Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers; N=531 Empowered Consumers.

Empowered Consumers also show greater willingness to help society than other consumers. Our research reveals that:

- 36% of Empowered Consumers will volunteer for a clinical trial to advance the progress of new therapies (drops to 26% for non-empowered).
- 57% will share personal health data if it benefits research on new therapies (drops to 40% for non-empowered).

As Figure 11 shows, Empowered Consumers are more likely to take proactive steps to improve their health in the future. Over 60% of Empowered Consumers say they will exercise more once the pandemic is over (versus 47%). In addition, 63% say they will ensure a stock of medications at home (versus 41%).

Figure 11: Empowered Consumers are more likely to improve their health behaviors moving forward



Source: Capgemini Research Institute, Consumer Health Survey, June 2020, N=2,039 consumers; N=531 Empowered Consumers.

63% OF EMPOWERED CONSUMERS WILL ENSURE THEY ALWAYS HAVE A STOCK OF MEDICATIONS AT HOME IN THE FUTURE

Action points for pharmaceutical and consumer health organizations:

- **Empower consumers through mobile apps.** Life sciences companies should leverage technology to provide patient support through mobile apps. Next-generation healthcare apps with personalized content can empower patients. They do this by allowing them access to credible content about illnesses and reducing communication challenges between the patient and physician. Merck & Co. developed a dual healthcare app that provides both patients and healthcare providers with a repository of verified content on drugs, medications and therapies, along with a detailed database of updated information on diseases and their symptoms.⁴¹
- **Identify and learn from empowered patients.** Life sciences companies should conduct primary research to identify and segment empowered patients that could be tapped during health emergencies. For example, empowered patients could be called on to participate in clinical trials, with technology acting as an enabler. GlaxoSmithKline, a British pharma company, has developed an application called GSK Studies that allows quick and easy access to trial data across several medical topics. Several pharmaceuticals, including Roche, have also developed apps that allow patients to schedule trial dates.⁴²

Action point for healthcare providers:

- **Devise supported self-healthcare management schemes.** With digital technology acting as an enabler, national healthcare providers should look to promote supported self-care among patients. The NHS' Long Term Plan provides a "Comprehensive Model for Personalized Self-Care" that promotes shared decision-making, supported self-management, choice-enablement, and health-budget management, among others.⁴³ This also provides an opportunity for consumer health organizations and medical device manufacturers to collaborate with healthcare providers to promote digital and touchless services.

Action points for life sciences organizations and healthcare providers:

- **Harness emerging technology to improve patient engagement and experience.** Life sciences companies and healthcare providers can use smart communication devices to provide patients with real-time information and alerts. Immersive technology may be used to create an interactive learning environment that informs patients about self-care. Some companies have experimented with creating smart rooms that simulate a patient's experience in high-stress environments such as waiting rooms and exam rooms.⁴⁴ Improved patient engagement can lead to improved patient empowerment. Philips Healthcare has developed the HealthSuite platform (connected wearables and an app) that enables people at risk of developing chronic illnesses to become more engaged in their well-being.⁴⁵
- **Allow open but secure access to health data to empower patients to use remote healthcare.** Large amounts of data are generated via telehealth platforms, remote patient monitoring devices, and patient forums. These data, if freely accessed throughout the healthcare value chain, would not only allow healthcare providers and life sciences companies to improve treatments and care for remote patients, but also allow easier identification of illness trends, symptoms, treatments, and possible preventative measures for the general population.⁴⁶ Bayer Pharmaceuticals partners with patients to promote informed use of such data for improved self-care.⁴⁷

Conclusion

The COVID-19 pandemic has been a major humanitarian and health disaster. However, it has also made us more conscious of our vulnerabilities and of our health. At the same time, it has also accelerated innovations in healthcare: connected devices, digital health solutions, fitness and wellness apps, and mental health programs. The pandemic proved the willingness of consumers of all ages to embrace the potential of digital health services. A developing ecosystem of accelerating digital health technologies, growing acceptance of virtual or low-touch health services, as well as easing of regulations and a renewed focus on patient empowerment open new opportunities for life sciences companies and healthcare providers. However, life sciences companies and healthcare providers will need to work together to deliver on this ambition. Collaboration across multiple stakeholders – including patients, doctors, regulators, payers, and technology firms – will be critical to improve health outcomes, enhance the patient experience, and reduce the cost of healthcare. Our collective health depends on it.

This document is part of the Capgemini Research Institute's special series of research notes on pragmatic tips to help organizations tide over the COVID-19 pandemic. You can find more such research notes and other tips and analyses at : <https://www.capgemini.com/our-company/covid-19-insights-for-today-and-tomorrow/>

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