Focus

Roland Berger

Future of health 4 |
The patients of tomorrow

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MANAGEMENT SUMMARY

Future of health 4 / *The patients of tomorrow*

The fourth annual *Future of health* study focuses on healthcare consumers, or "the patients of tomorrow." Almost 2,500 people from 19 countries answered a series of survey questions about their openness to medical and technological innovations, whom they trust in the healthcare sector and their willingness to pay technology companies for integrated healthcare pathways.

Tomorrow's patients will be confronted with radical new options for treatment. With this in mind, we first asked them about their general openness towards new technology. Our most striking finding was that patients largely have a positive attitude towards innovations. This was particularly true for the younger generation – the older generation remain skeptical, preferring more traditional approaches. As the older generation are also more likely to be in worse health, it seems that precisely the group that needs innovations the most are the least open to them.

Despite some lingering concerns, providers will most likely press ahead with the introduction of new services. Importantly for providers, the survey found that around 25 percent of patients would like to be steered through a coordinated healthcare system – a surprisingly high number – and another 50 percent are currently undecided. The remaining 25 percent prefer to choose their own physicians and treatments.

In a similar vein, traditional healthcare providers – physicians, hospitals and pharmacists – still enjoy the greatest level of trust on the part of patients, unlike the companies behind digital platforms, for example. But the race is far from being over. In the end, the winner will be the player who provides the best medical evidence for the effectiveness of their offering. The survey confirms just how important this is for patients: A clear majority of patients, some 63 percent, state that access to the best possible treatment matters more to them than data protection.

We also asked respondents whether they would be happy to pay private technology companies for integrated digital healthcare pathways. Around 40 percent were quite open to this suggestion, while a further 35 percent could be convinced.

All players in the healthcare arena will need to make major efforts to overcome patient skepticism about innovations. Importantly, they must differentiate their approaches for the diverse patients of tomorrow. This makes things more complicated for them – but it also creates new opportunities for personalized strategies.

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1 / The future of health survey

UNDERSTANDING TOMORROW'S HEALTH CONSUMERS

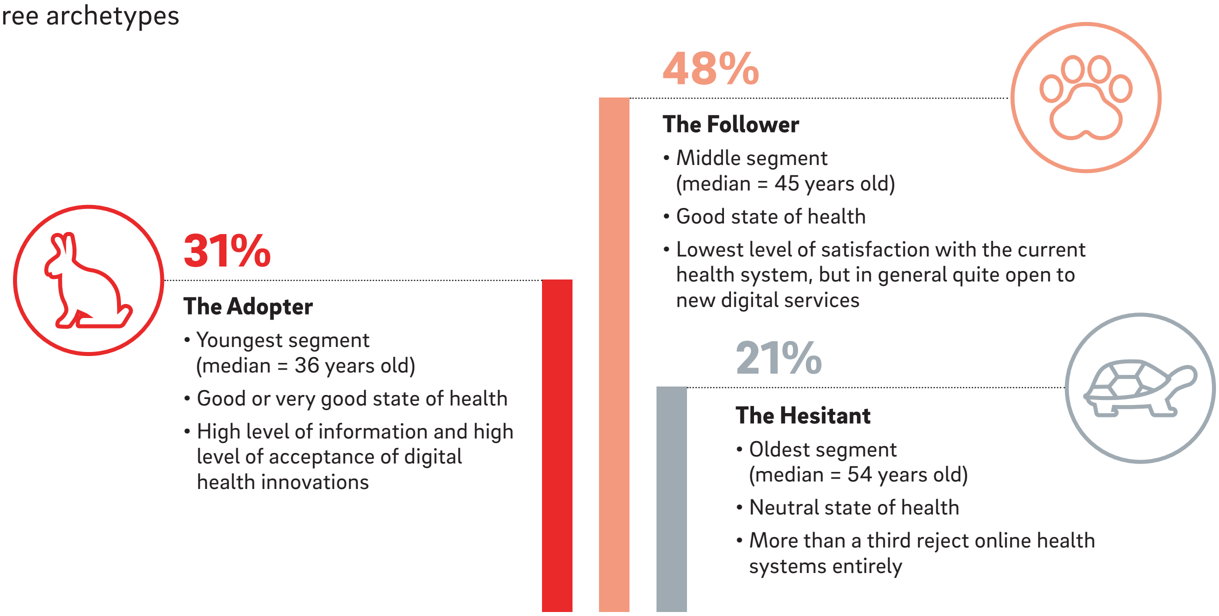
Each year, the *Future of health* study focuses on a topic of special relevance for the healthcare sector. For this year's study – the fourth in our series – we surveyed almost 2,500 people from 19 countries around the world. Our focus this time was on these individuals themselves, whom we call the "patients of tomorrow."

Why the "patients of tomorrow"? First, because all of us fall sick at some point in our lives, however robust our health is at the moment. In that sense, we are all of us patients or have been in the past or will be in the future. Accordingly, we use the phrase to cover any type of health consumer, whether currently in poor health or in good health and investing in their future wellbeing through preventive action.

In fact, prevention and treatment need to go hand in hand. Healthcare must strive towards fully integrated, human-based health services, right across the patient's lifetime. This integrative approach is beneficial for tertiary prevention in patients who have recovered from illnesses such as cancer, for example. It is equally relevant for all of us who have survived a COVID-19 infection or suffer from common ailments such as hypertension.

The patients of tomorrow are confronted with an array of new technologies, from smartphone apps to home testing and genetic analysis. They benefit from novel therapeutic approaches – new modalities, cell and gene therapies, mRNA therapeutics and so on – that potentially transform the way they interact with

A: The patients of tomorrow
Three archetypes



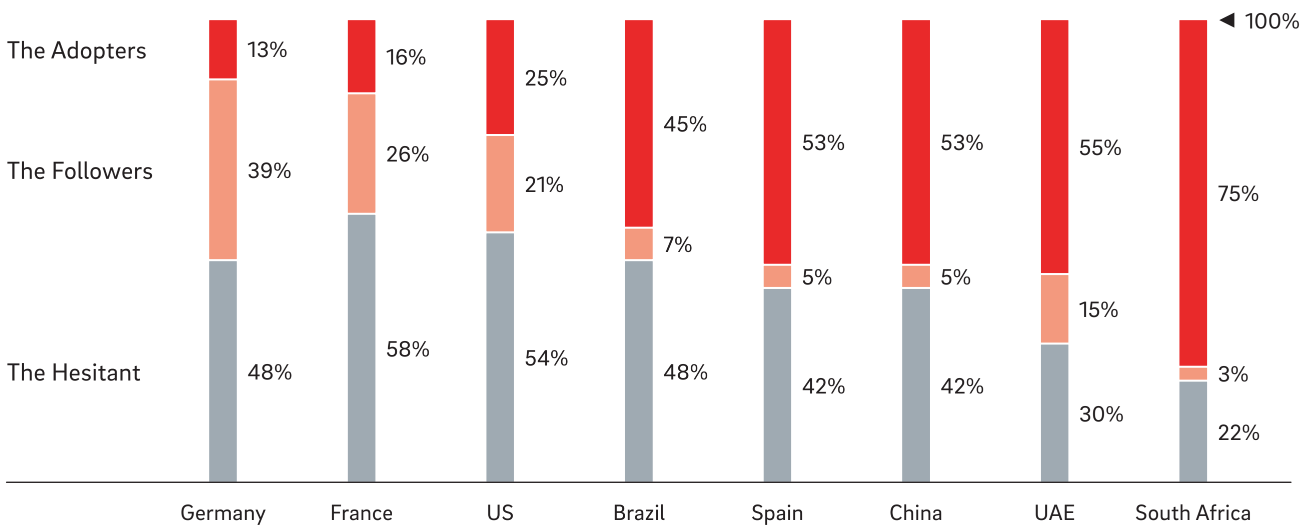
Source: Roland Berger

healthcare providers and receive health-related services. This empowers patients, giving them greater agency than was ever the case in the past. They are free to develop the same customer expectations as they demonstrate in interactions with other service providers. But it also means that they can choose to adopt the new technologies or not. Tomorrow's patients need to invest time in understanding their options: This, after all, is their chance to determine the direction taken by tomorrow's healthcare.

One of our main objectives in carrying out this year's *Future of health* study was to determine what these newly empowered patients' expectations are. We also investigated how open the patients of tomorrow are to taking advantage of the new opportunities, and how players in the medical sector can best respond. Based on the survey results we identify three patient "archetypes" or groups of healthcare consumers, differing significantly in their characteristics, behaviors, expectations and attitudes towards medical innovations, including new technology. We call these three groups the Adopters, the Followers and the Hesitant. → A

Noticeably, industrialized countries, which have well-established healthcare systems and often older populations, are home to fewer Adopters than less industrialized countries – one of just a number of striking differences between healthcare consumers in different countries. We discuss the differences between the three archetypes and their significance for the healthcare sector in greater detail in Chapter 4. → B

B: Industrialized countries have fewer Adopters
Archetypes by country



Source: Roland Berger

2 / Medical and digital innovation

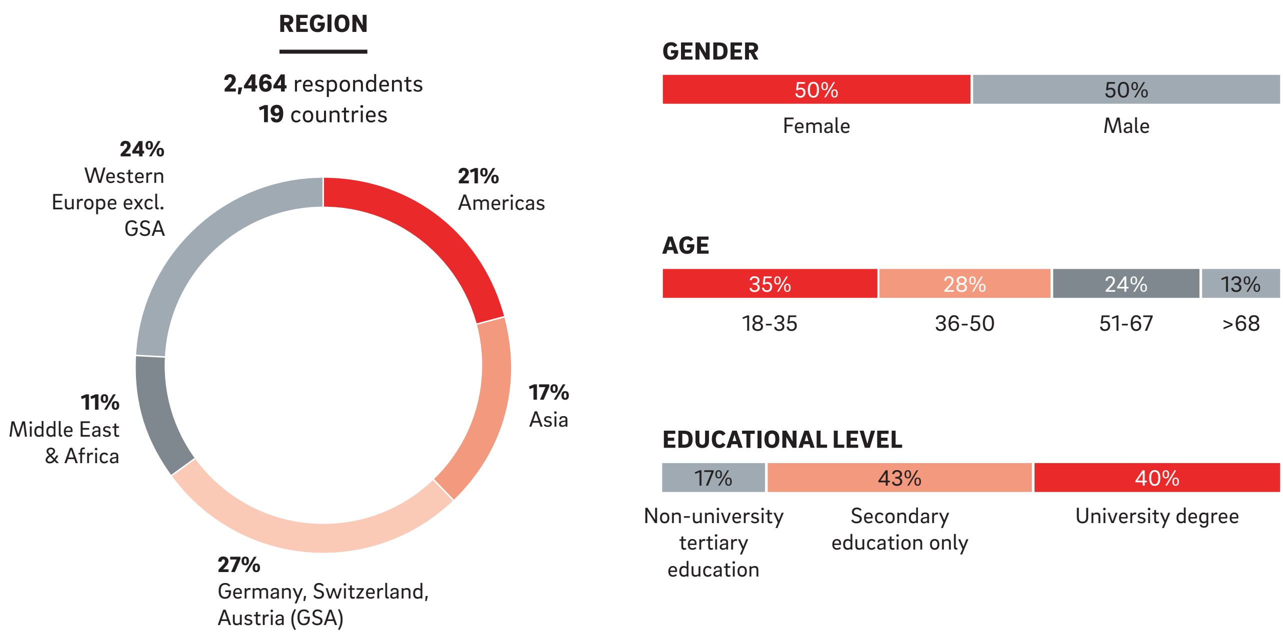
HOW OPEN ARE PATIENTS TO CHANGE?

To understand how the patients of tomorrow are changing – and what the healthcare industry can do in response – we performed extensive desk research and collated detailed information from scientific research and trend studies. We also spoke to experts in healthcare to identify the major trends and areas of interest. On this basis, we then developed a survey comprising a series of questions about attitudes and behaviors with regard to healthcare, including the use of new technology. This formed the fourth of our annual *Future of health* surveys. The survey was completed by almost 2,500 individuals from 19 different nations. Respondents were fairly evenly balanced in terms of their gender, age and educational background. → C

Medical progress is advancing ever more rapidly. As a result, patients will be confronted with a wide array of completely novel opportunities for treatment. To what extent they accept or reject these new options will have a huge impact on the healthcare sector.

With this in mind, we asked respondents how they felt about healthcare services. This generated one of the key findings of our survey: Patients largely have a positive attitude to new technology. Most patients, and the younger generation in particular, are open to using innovative digital tools – checking their

C: Future of health survey
Breakdown of respondents

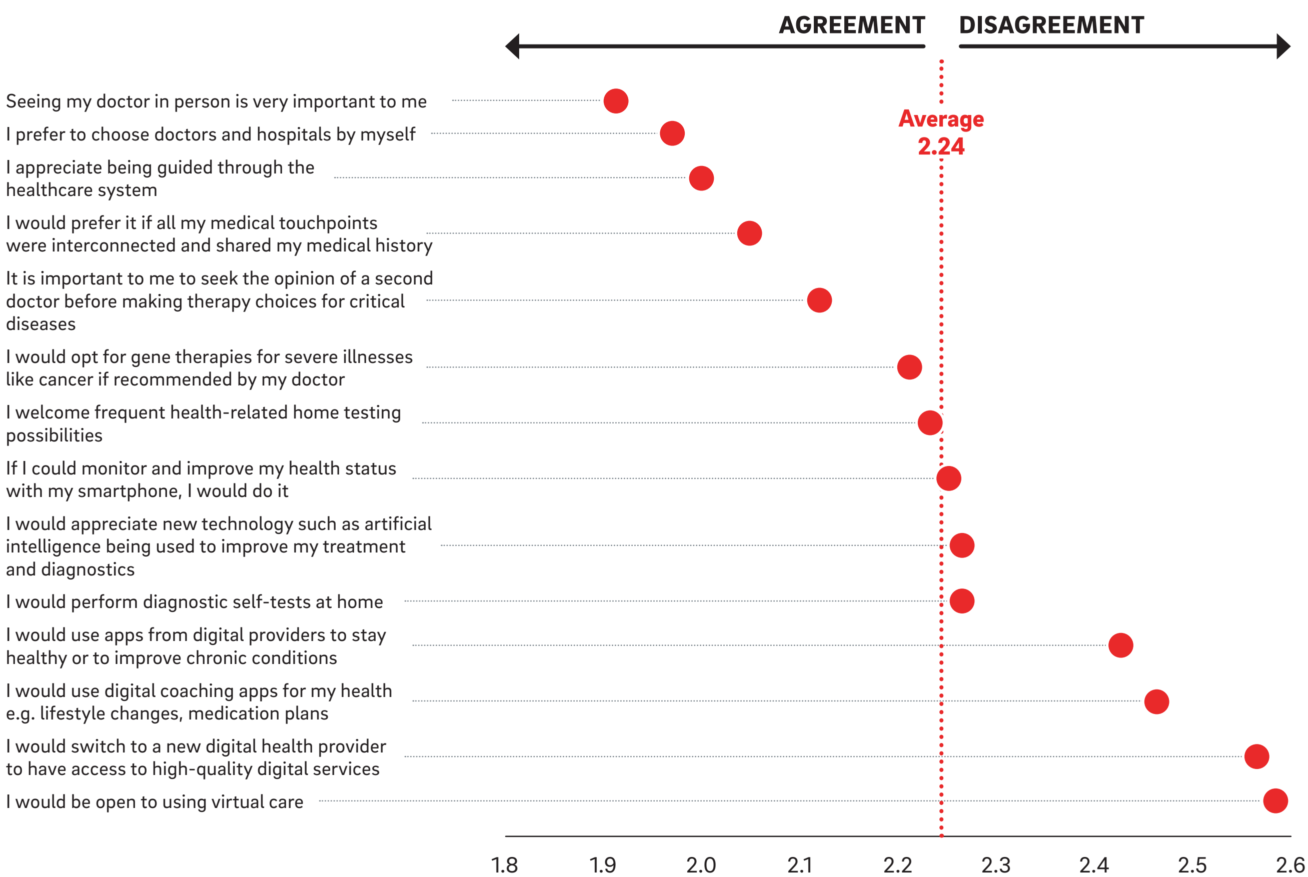


Source: Roland Berger

symptoms with an app, talking to a physician online, getting prescriptions electronically and having drugs sent directly to their homes. Older respondents, who are also more likely to have existing conditions or health issues, are still skeptical, however. Attitudes to innovations in healthcare, both treatment-related and technological, vary depending on the specific innovation in question. → D

D: Attitudes towards healthcare services

Levels of acceptance vary between different innovations



1 = strongly agree, 5 = strongly disagree

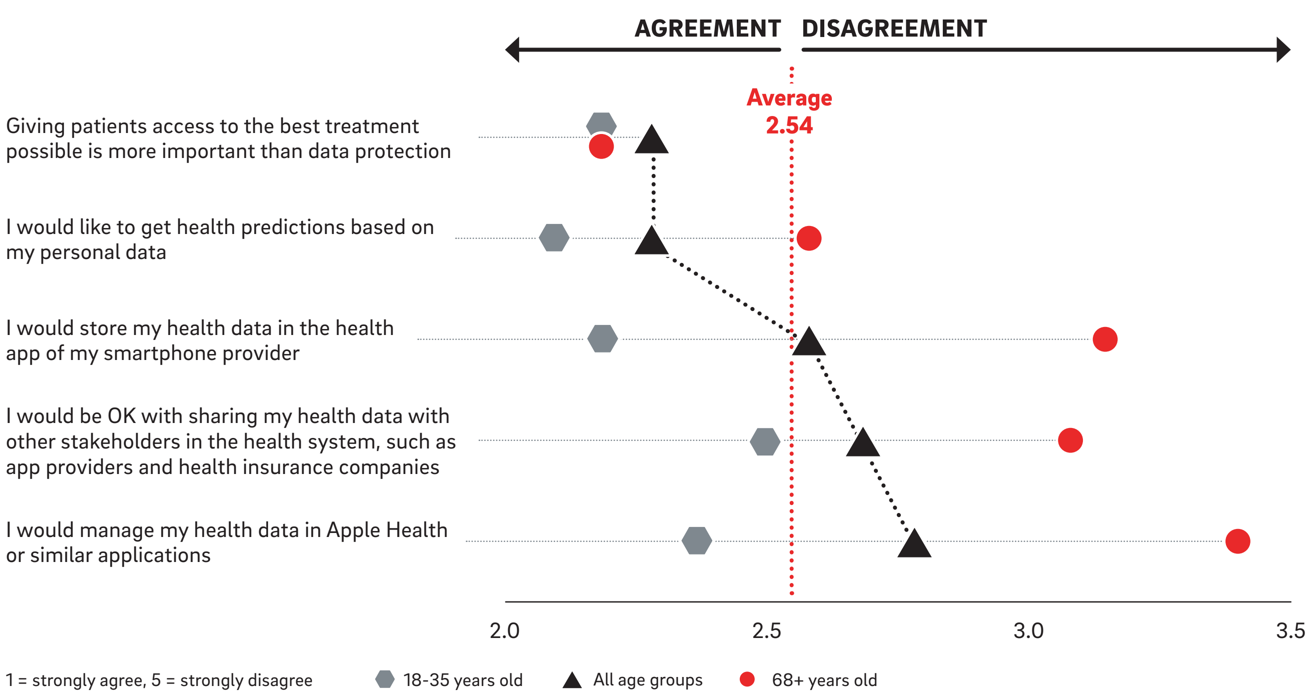
Source: Roland Berger

As with many technological innovations, the issue of data protection is ever-present in digital medicine. This is a concern for patients – indeed, the survey shows that they are only willing to share their personal health data if they believe that they will benefit from doing so. Thus, two-thirds of tomorrow's patients say they would like to receive health predictions based on their personal data, and around the same proportion believe that accessing the best treatment possible is actually more important than data protection. As innovations such as automated, 24/7 monitoring of patients through wearables and other devices become more common, the potential of digital healthcare to make treatment more effective, efficient and personalized will become increasingly clear. This will likely lead to greater acceptance by patients, although skepticism will no doubt remain, with many patients placing their trust first and foremost in traditional, face-to-face medicine. → E

Patients in developing countries generally appear to be more confident sharing their health data in the interests of improving their health. The highest levels of trust are found for respondents in countries such as

E: Data protection

Are tomorrow's patients happy to share their personal health data?



Source: Roland Berger

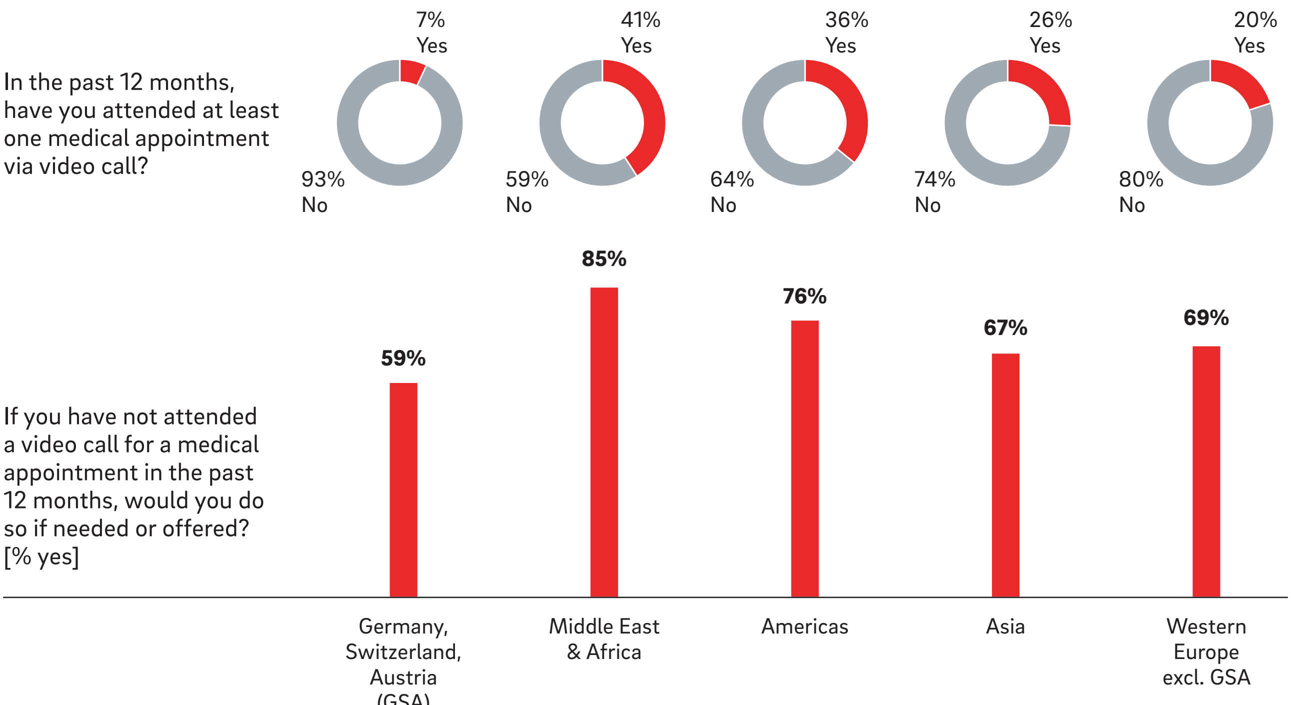
South Africa, the United Arab Emirates, China, Qatar and Mexico, the lowest levels in countries including Switzerland, Japan and France.

When it comes to replacing face-to-face visits with online consultations, however, patients have significant reservations. Overall, as many as two-thirds are open to the idea of physicians' appointments via video in principle but given the choice they would opt for a personal visit. Indeed, less than a quarter of respondents had actually made use of video appointments in the past, although this is no doubt partly because they are not available in all countries yet or, where available, they may be difficult to access.

One possible interpretation of the data is that patients are open to telemedicine as an additional offer, but not if it replaces traditional physicians' appointments. Their take-up of digital offers also depends strongly on how the offering is framed by providers. Players in the healthcare sector will need to convince the patients of tomorrow of the benefits of virtual consultations. These benefits are considerable in terms of convenience, time, hygiene, quality and cost. → F

F: Openness to medical appointments via video

Patients who have had a video appointment and those willing to do so

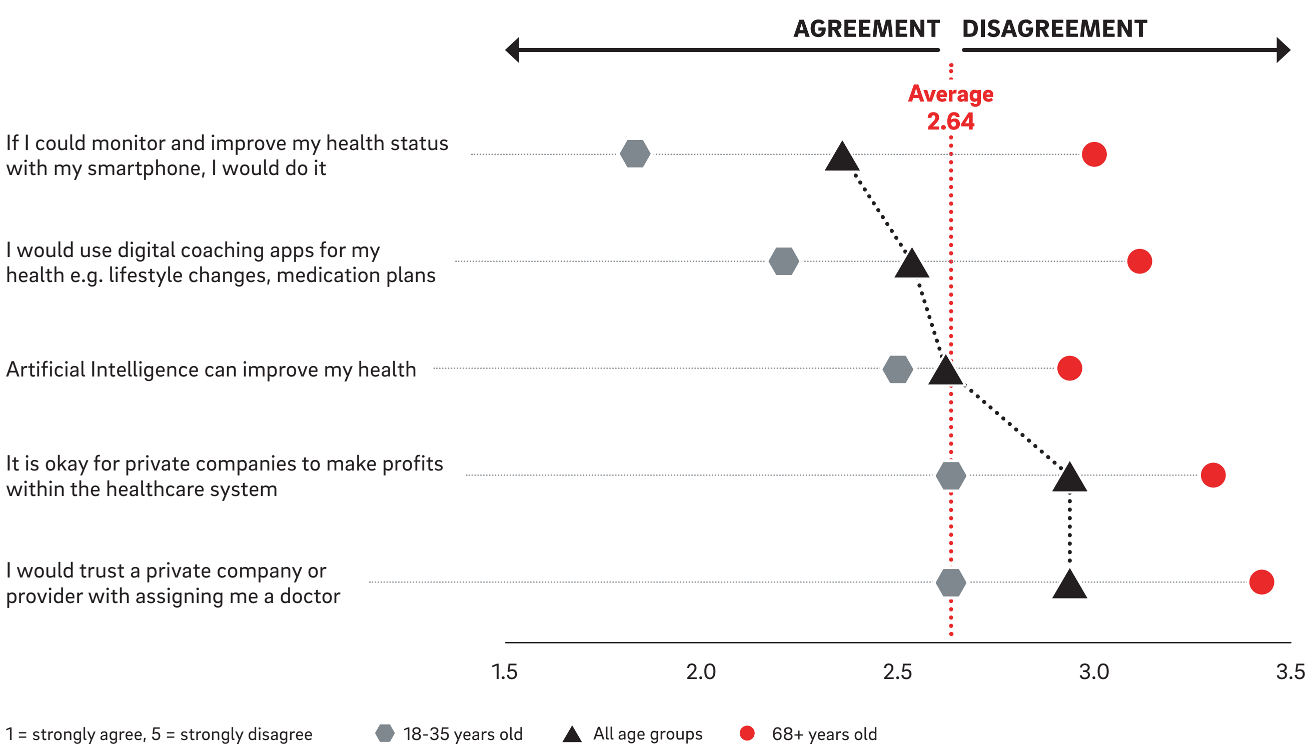


Source: Roland Berger

When it comes to using digital apps on their smartphones to monitor and potentially improve their health or receive coaching (for lifestyle changes, medication plans and so on), young patients are relatively happy to accept this technological innovation. This stands in stark contrast to the response of older patients, who have yet to be convinced. → G

One area where the patients of tomorrow remain skeptical across the board is the use of artificial intelligence (AI) in their personal healthcare. So far, providers have not managed to convince patients of the benefits of AI. Patient attitudes are likely to change once treatments, rather than just diagnoses, begin to be delivered via AI-empowered software. Indeed, digital therapeutics such as apps helping patients with insomnia, anxiety or conditions such as diabetes or hypertension, where poor adherence to medication is a significant problem, are expected to become a blockbuster category in the future.

G: Willingness to use health apps on smartphones
Acceptance varies strongly between young and old

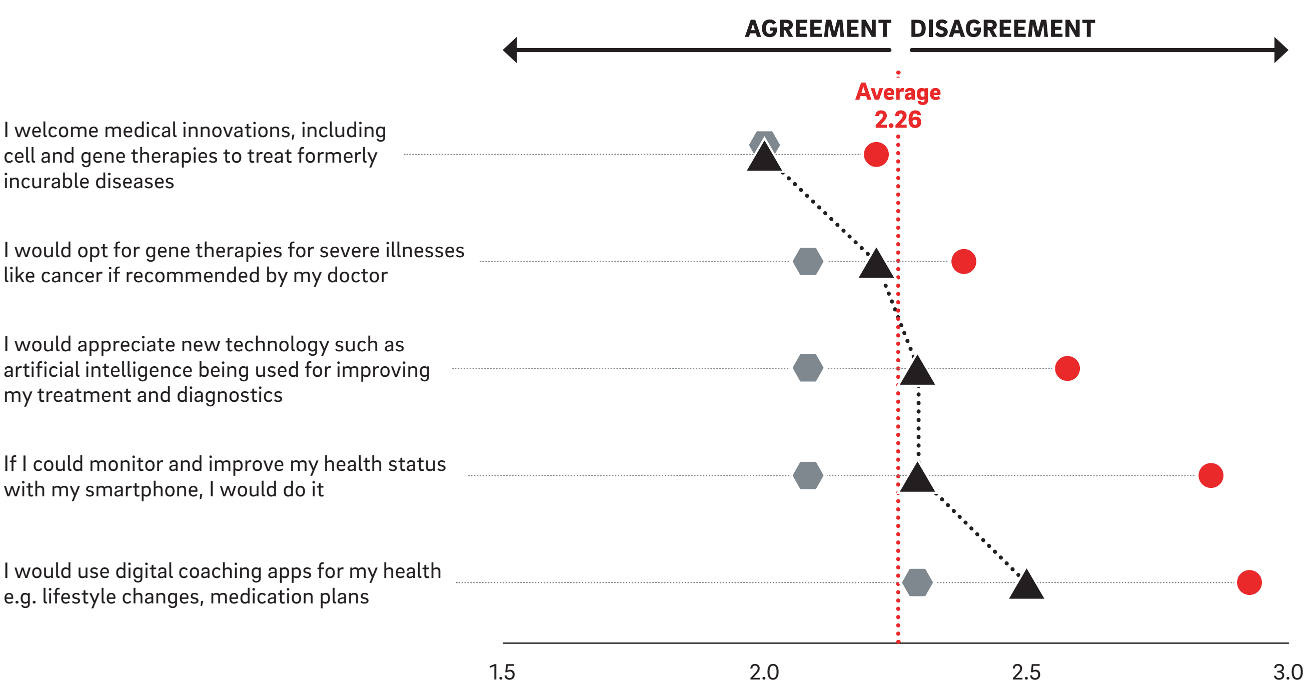


Source: Roland Berger

One particularly interesting finding of the *Future of health* survey was that respondents with a worse health status were generally less open to digital solutions, AI or digital coaching apps than patients in better health. The reasons for this are unclear. This increased skepticism towards digital solutions of all types among the sick holds true, even when adjusted for age – although this hesitancy does not extend to the use of cell and gene therapies, say.

Similarly, across all age groups, respondents with a worse health status expressed less confidence in private digital health solutions and less trust in players in the healthcare sector than their healthy peers. Respondents educated to a higher level were also more willing to use digital health solutions provided by Big Tech companies. → H

H: Health status and openness to innovation
Respondents in worse health are more hesitant



1 = strongly agree, 5 = strongly disagree

Respondents with good or very good self-reported health status; All respondents; Respondents with bad or very bad self-reported health status

Source: Roland Berger

3 / Players in tomorrow's healthcare system

WHOM DO PATIENTS TRUST AND WHAT ARE THEY WILLING TO PAY FOR?

The fourth *Future of health* survey also looked at the role of different players in tomorrow's healthcare system, how they can differentiate themselves and where they will face the stiffest competition. As a basis for our analysis, we asked patients whom they want as their main point of contact during their healthcare journey, whom they trust and how they feel about paying out of their own pocket for medical care.

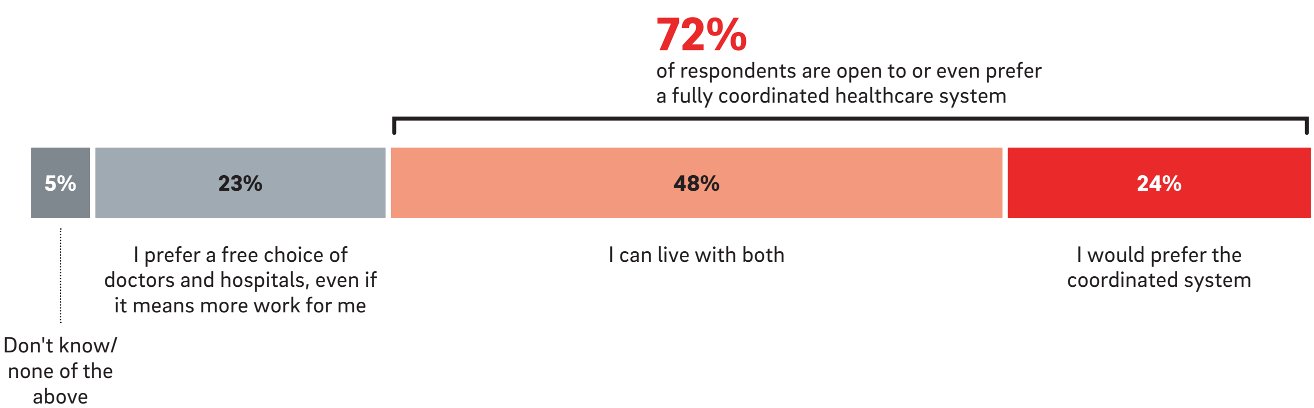
Encouragingly, tomorrow's patients are convinced that they can have a positive impact on their own health by adopting good habits: 82 percent of respondents agreed or strongly agreed with this suggestion. The majority of respondents rejected the idea that it was "all in their genes." They also show great openness towards preventive actions and nutritional schemes.

When it comes to how patients are guided through the healthcare system, the survey revealed that respondents are divided. One-quarter said that they would like to be steered through a coordinated system, while another quarter prefer to choose their own physicians and treatments. The remainder could live with both systems. It would appear that while some patients would like to determine by themselves when to receive a treatment and from whom, the vast majority would still appreciate guidance through the system on specific occasions. As with openness to digital innovations, differences occur between respondents depending on their age, level of education and current health status. → I

I: Attitude towards a coordinated healthcare system

The majority are at least open to more guidance

Imagine the doctors and hospitals in your home region were all connected with each other. Say, they had organized a coordinated care processes so that you didn't have to organize your appointments by yourself. Instead, when you have a referral, the appointment gets organized for you. What is your attitude towards such a system in comparison to the current one?

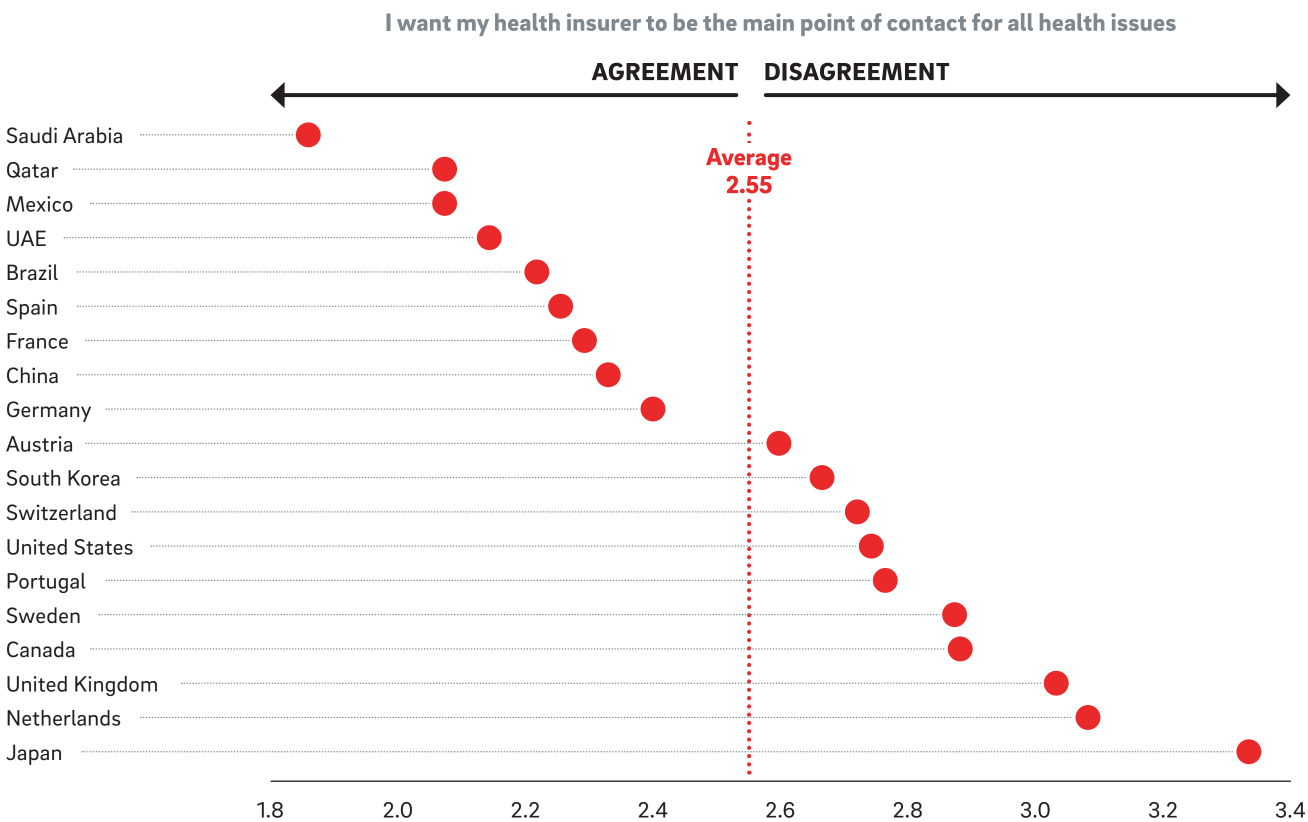


Source: Roland Berger

When it comes to the preferred main point of contact for health issues, only half of respondents named their health insurer. The remainder, we assume, would rather trust their physician to guide them than their insurer. Here, major differences exist between patients in different countries. In Germany and France, for example, the majority of patients would rather rely on their health insurer for guidance through the system. This disparity between health consumers in different nations is probably due to the fact that healthcare systems and how they are organized vary greatly from country to country. → J

J: Preferred point of contact

A varied picture across countries



1 = strongly agree, 5 = strongly disagree

Source: Roland Berger

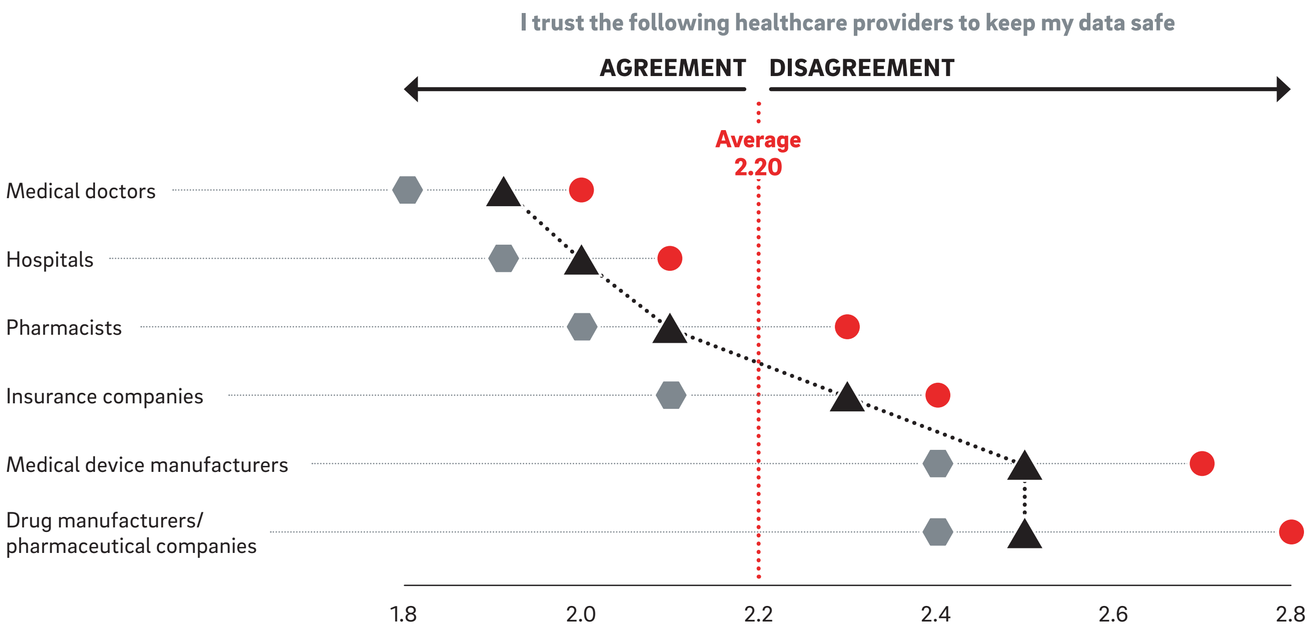
Traditional healthcare providers enjoy the greatest trust from patients: Respondents would be more likely to trust physicians, hospitals and pharmacists with their personal data than they would other players in the medical sector. Further down the trust rankings come insurance companies, with manufacturers of medical devices and pharmaceutical companies at the bottom of the list. → K

Again, respondents differ in their attitudes depending on their health status. We saw before that patients with a worse health status are generally less open to digital solutions, AI and digital coaching apps; they are also less trusting of the various players in the healthcare sector than those with a better health status. However, the order in which the different players are ranked in terms of trustworthiness remains the same, with traditional healthcare providers at the top and insurance companies, medical device manufacturers and pharmaceutical companies at the bottom.

We dedicated one section of our survey to the question of private companies' involvement in the provision of medical services. This is highly topical as the race heats

K: A question of trust

Physicians are the most trusted players in the medical sector



1 = strongly agree, 5 = strongly disagree

Respondents with good or very good self-reported health status · All respondents · Respondents with bad or very bad self-reported health status

Source: Roland Berger

up between traditional actors in healthcare and Big Tech firms. We found that a large proportion of patients are highly skeptical about private companies being involved in their healthcare. Moreover, the level of trust they place in such companies depends very much on their age: The older they are, the less trusting they are. → L

In recent years, Big Tech companies have bet heavily on health-related services, spending billions on innovations such as online pharmacies, telemedicine, wearables, health-related AI and digital health records. Whether these bets pay off depends very much on the extent to which patients accept those innovations. We asked respondents whether they would be willing to pay for integrated digital healthcare pathways, if they were provided by a technology company. Around 40 percent were quite open to this suggestion, while a further 35 percent could be convinced. At the same time, patients' willingness to pay for innovations out of their own pockets decreased by age of the respondent.

Respondents in developing countries such as China or Brazil are significantly more trusting of private healthcare providers and are more willing to pay for their services themselves than respondents in countries with sophisticated healthcare systems such as Germany or the United States.

We also asked respondents which specific health products and services they would be prepared to make co-payments for, if their insurance did not cover them. In the question, we cited services ranging from 24/7 availability of physicians and pharmacists to self-testing kits, cosmetic surgery procedures, preventive services and innovative cures. In general, young people are much more willing to pay for such services than older people. However, it depends on the service in question: Young people are more likely to pay for 24/7 access to physicians and pharmacists, while older people are more likely to pay for preventive services and self-medication.

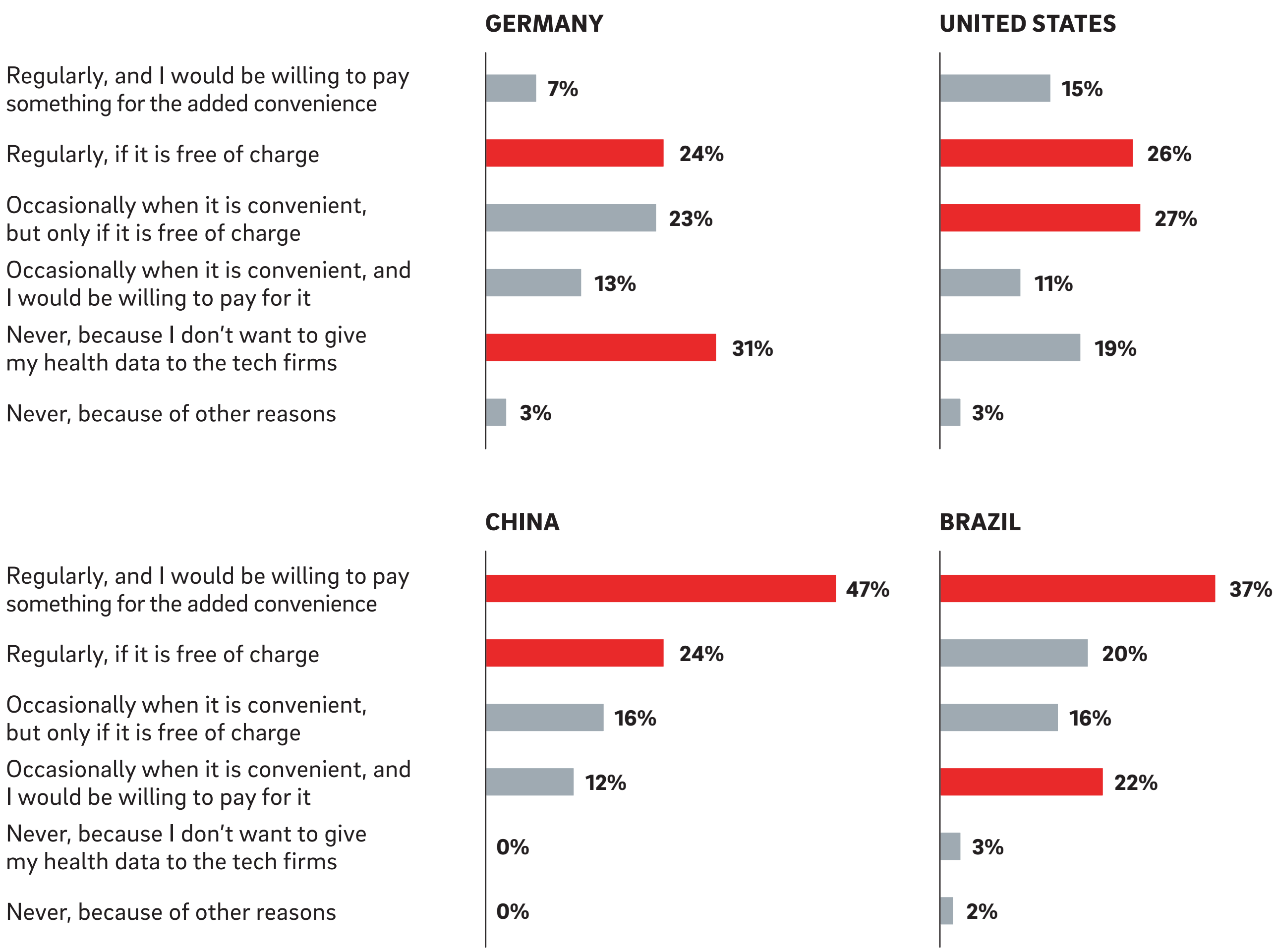
> *Many players could succeed in the battle for the patients of tomorrow. The key is to be the first on the scene with a convincing offering.*

Finally, we asked respondents whether they thought that the healthcare system would be able to finance its increasing levels of innovation itself in the future. Only a minority believe that it will be able to do so, while 55 percent believe that a large part of this progress will have to be paid for out of their own pockets in the form of co-payments. This suggests that the race is far from over. Many different players could succeed in the battle for the patients of tomorrow: The key is to be first on the scene and to provide the best medical evidence for the effectiveness of your offering.

L: Trust in private companies

Willingness to use health services provided by Big Tech (e.g. symptoms check, telemedicine, electronic prescription, drug delivery) when it is convenient, and I would be willing to pay for it

Imagine a big technology company, like Google or Apple, offered you online health services. You could check your symptoms with an app, talk to a physician online, get an electronic prescription and have the drugs sent to your home. Would you use their services?



Source: Roland Berger

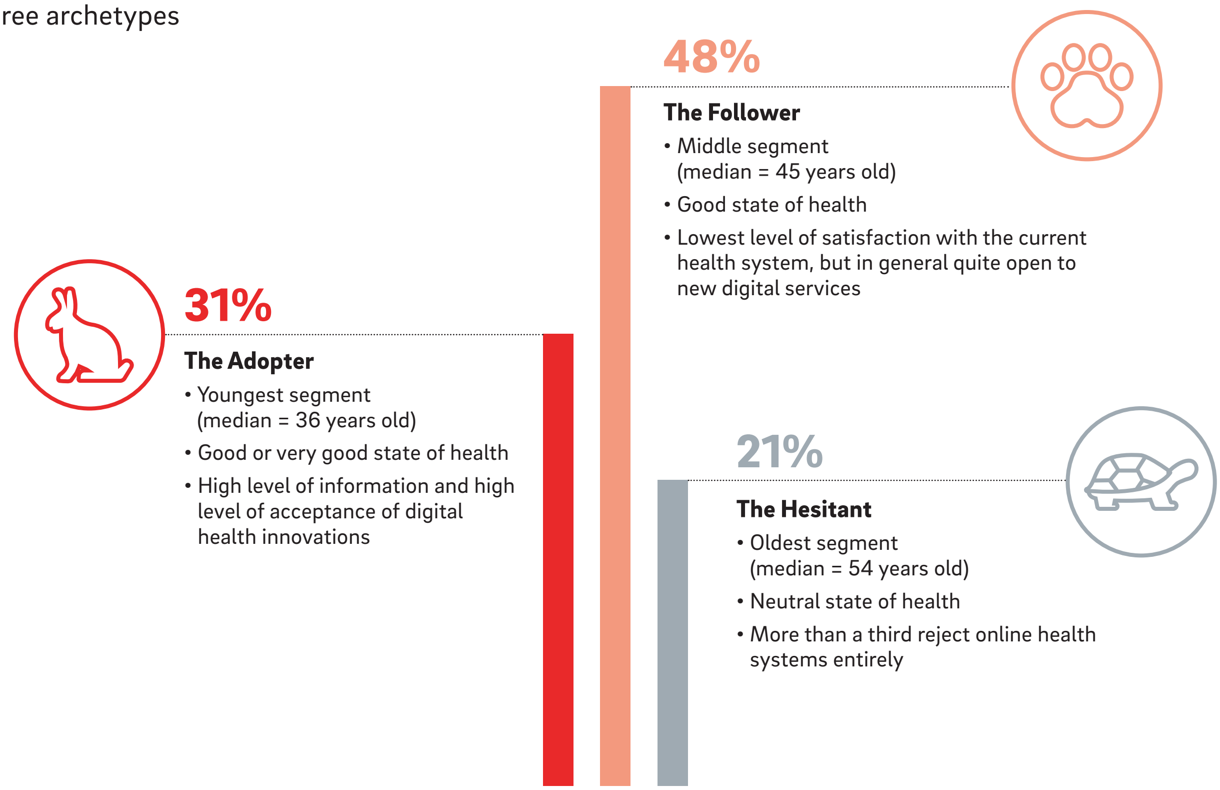
4 / What are tomorrow's patients like?

A TYPOLOGY OF HEALTH CONSUMERS

It is vital that players in the medical sector understand the patients of tomorrow – who they are, how they behave and what makes them tick. Discovering this information was one of the chief aims of the fourth *Future of health* survey. Drawing on our findings, players can develop different solutions for different patient groups in a "segment-specific" approach. Over time, patient groups are likely to become even more distinctive, posing additional challenges for medical service providers. Using their understanding of the patients of tomorrow, players can try to actively shape the development of the healthcare sector – rather than being passively shaped by it.

Using k-means clustering we were able to group respondents across all 19 countries in the survey into three distinct types, or "archetypes." These three archetypes differ significantly in their characteristics, behaviors, expectations and attitudes towards medical innovations. We call them **the Adopters, the Followers** and **the Hesitant.** → M

M: The patients of tomorrow
Three archetypes



Source: Roland Berger

THE ADOPTERS

Adopters are the youngest group of future patients, with a median age of 36. They make up 31 percent of the survey respondents. Of the three archetypes, Adopters have the highest level of satisfaction with the medical system. They access information on health topics regularly, mainly online on various websites. They engage in physical exercise several times a week and their health status is generally either good or very good.

When it comes to medical innovations, Adopters are well informed: Three-quarters of them have a high level of information about innovations. As many as 88 percent would be happy to have video appointments with medical practitioners. Forty-one percent would access online health systems on a regular basis and be prepared to pay partially from their own pocket for them, while 27 percent would use them regularly if they were free of charge. They would also be happy using online medical services offered by Big Tech companies.

THE FOLLOWERS

Followers are the middle group of the three, with a median age of 45. They represent just under half of all survey respondents. Interestingly, they display the lowest levels of satisfaction with the medical system: They are less satisfied than the Adopters and even the Hesitant. Like the Adopters, they access health information mainly on websites, albeit only from time to time. They exercise several times a week and are, as a rule, in good health.

Followers are less well informed about medical innovations than Adopters: Only 41 percent of them have a high level of information. Three-quarters of the group are willing to have video appointments with physicians and over a third would use online health systems on a regular basis, even if it required making a co-payment. When it comes to online medical services offered by Big Tech companies, Followers say that they would use them occasionally, if they made things more convenient.

THE HESITANT

We call the final group of patients the Hesitant. With a median age of 54, this is the oldest segment, and it makes up just over a fifth of respondents. The Hesitant display a medium level of satisfaction with the medical system. Unlike the other two archetypes, they mainly turn to their physicians for health information rather than going online. They only exercise occasionally and their state of health can be described as somewhere between good and neutral.

Unsurprisingly, perhaps, this group of patients are the worst informed about medical innovations, with less than one-third being well informed about this topic. They are not, however, closed-minded when it comes to innovations: 65 percent say they would be happy to have video appointments with a physician – although the number that would actually take up this offer may be somewhat lower in reality. A major difference between the Hesitant and the other two archetypes is their attitude towards sharing data with online health providers: 41 percent of the Hesitant categorically reject the use of such systems, as they would never give their personal health data to tech firms. The same goes for online medical services offered by Big Tech companies: The Hesitant say that they would not use them.

5 / Recommendations

A DIFFERENTIATED APPROACH

The fourth *Future of health* survey paints a detailed picture of the patients of tomorrow. What should the various players in the healthcare arena be doing to win over these patients for their innovations and overcome the high levels of skepticism that remain? We suggest some actions for specific types of players below. What is clear for all players, however, is that the approach they take must be differentiated for the diverse patients of tomorrow. A tactic that works for young, healthy consumers in developing countries will not work with older consumers in worse health in industrialized countries. Players that are active internationally must also take into account the major differences that we identify between healthcare consumers in different countries, adjusting their strategies regarding their offering and potential partnerships accordingly.

The increasing individualization of consumers certainly makes things more complex for providers. But it also creates new opportunities. Individual customers require more detailed information, and that makes it possible for service providers to personalize their strategies. In a segment-specific and highly individualized digital approach, the success of treatments will increase at the same time as the cost of supporting patients decreases thanks to digitalization. Handled correctly, this can lead to better outcomes and increased efficiency overall.

For all players, how they frame their message is critical. The survey suggests that the patients of tomorrow will only trust private providers with their personal health information if the benefits of doing so are clearly communicated to them. They are far less likely to do so if they cannot see what they will get out of it. Their trust in digital providers is also likely to depend on how transparent the providers are about where they store their data, for example. Overall, patients trust healthcare providers the most; all other players will need to build stronger, trust-based relationships with the patients of tomorrow to ensure success.

The increasing individualization of consumers certainly makes things more complex for providers. But it also creates new opportunities.

HEALTH INSURANCE COMPANIES

For health insurance companies, digital is a great marketing topic for younger, healthier, better educated target groups. However, they will need to communicate a different message for older, less healthy or less well-educated patients. Convincing this group to trust medical and technological innovations will take more time, effort and money. Partnerships with healthcare providers can serve them well here, as these individuals enjoy a high level of trust among the target groups in question.

Trust in health insurance companies varies greatly from country to country, so messages will also have to be country specific. In countries with high levels of trust, payors can continue along the road from "payor to player" – that is, towards becoming providers themselves. In countries where trust in insurance companies is low, on the other hand, they will need to try to find the right partners to build consumer trust.

In all cases, insurance companies will have to convince consumers of the benefits of their digital offerings. They would also be well advised to come up with different offerings for patients who want to steer their own health pathway in an autonomous manner and those who are happier to be guided through the system. A different approach will also be necessary for each of the three consumer archetypes: the Adopters, the Followers and the Hesitant.

HEALTHCARE PROVIDERS

Healthcare providers – hospitals, physicians, clinics, nursing homes and so on – need a profound understanding of their target group before starting to think about strategic measures. We advise them to put the patients of tomorrow at the center of their strategic positioning and development of a digital strategy.

As the race heats up between traditional providers in healthcare and Big Tech, providers need to be aware of their own unique selling proposition (USP). Using this as a basis, they can potentially start developing partnerships with tech companies so they can deliver relevant services and so expand their value chain.

On the sales and marketing side, providers will need to rethink their strategy, developing a sales and marketing approach that put the needs of patients firmly at the center. They can use different marketing channels and service channels to attract groups of patients who vary in terms of their openness to digital innovations.

Sector boundaries will need to fall in order to enable a continuous and sector-integrated, seamless patient journey. Traditional providers can achieve this by cooperating with outpatient services and by adding services from the secondary healthcare market (lifestyle, wellness, prevention). The goal is to increase the diversity of offerings so as to meet the needs of different patient groups.

The survey confirmed that healthcare providers remain extremely important in the digital age. Patients prefer face-to-face meetings with their physicians and place the greatest trust in them. Healthcare providers will therefore play a vital role in the rollout of innovations, and in convincing patients to use them.

PHARMACEUTICAL COMPANIES

Pharmaceutical companies will need to reduce their dependency on integrators and platforms. Their opportunity is to use their power to innovate and create data evidence that is so convincing that no-one can ignore their products. They can do this by demonstrating the benefits of those products for each specific patient group. This starts with selecting the right participants for clinical trials and then tracking real-life data, ideally in real time, and on this basis further personalizing their strategy. Players will need to take a robust approach – particularly important given the widespread perception that the drug market is overpriced and the ongoing need to fight off new players offering cheaper generics. Like health insurance companies, pharmaceutical companies can also benefit from fostering cooperation with traditional healthcare providers, as the most trusted stakeholders in the system, and actively shaping the new patient-centered ecosystems emerging in the digital health space.

MEDTECH COMPANIES

The role of medtech companies in serving the patients of tomorrow will be as critical as it is varied. These players will make an essential contribution to diagnosis and treatment, at the same time capturing the information that will enable a fully data-driven healthcare system. Of all the players in the healthcare space, they are under the greatest pressure to digitalize their portfolio. If they do so effectively, they will not only be able to generate health data 24/7 but also conduct procedures (for example, diagnostic radiology, in vitro and in vivo diagnostics), robotic surgeries and other treatments. In many cases they will still rely on the acceptance of healthcare professionals, but some will also have the opportunity to "forward integrate," delivering critical services directly to patients.

GOVERNMENTS

Governments will want to exploit the potential of digital healthcare to improve health outcomes. This will make their healthcare systems more efficient and help a diminishing workforce cope with the challenges of aging populations.

Governments can create a framework within which market players are able to introduce innovations and establish patient-centered networks for better care. At the same time, they should be aware that platforms have an inherent tendency to form monopolies, so part of their role will be to ensure the survival of healthy competition.

It is important that the regulatory frameworks that policymakers set up allow the creation of standardized smart datasets in the areas under their control. External parties should then be allowed to use these datasets to develop applications based on artificial intelligence (AI) and other digital solutions that patients can use to access better healthcare. A major task for governments here will be to gain the acceptance of healthcare providers and patients for such data-gathering activities. Doing so calls for effective communication, personalized for different target groups, of the potential benefits.

It is important that the regulatory frameworks allow the creation of standardized smart datasets that can be used by external parties to develop AI-based applications.

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