Reimagining the healthcare experience

2021 Accenture Health and Life Sciences Experience Survey – **Australia findings**

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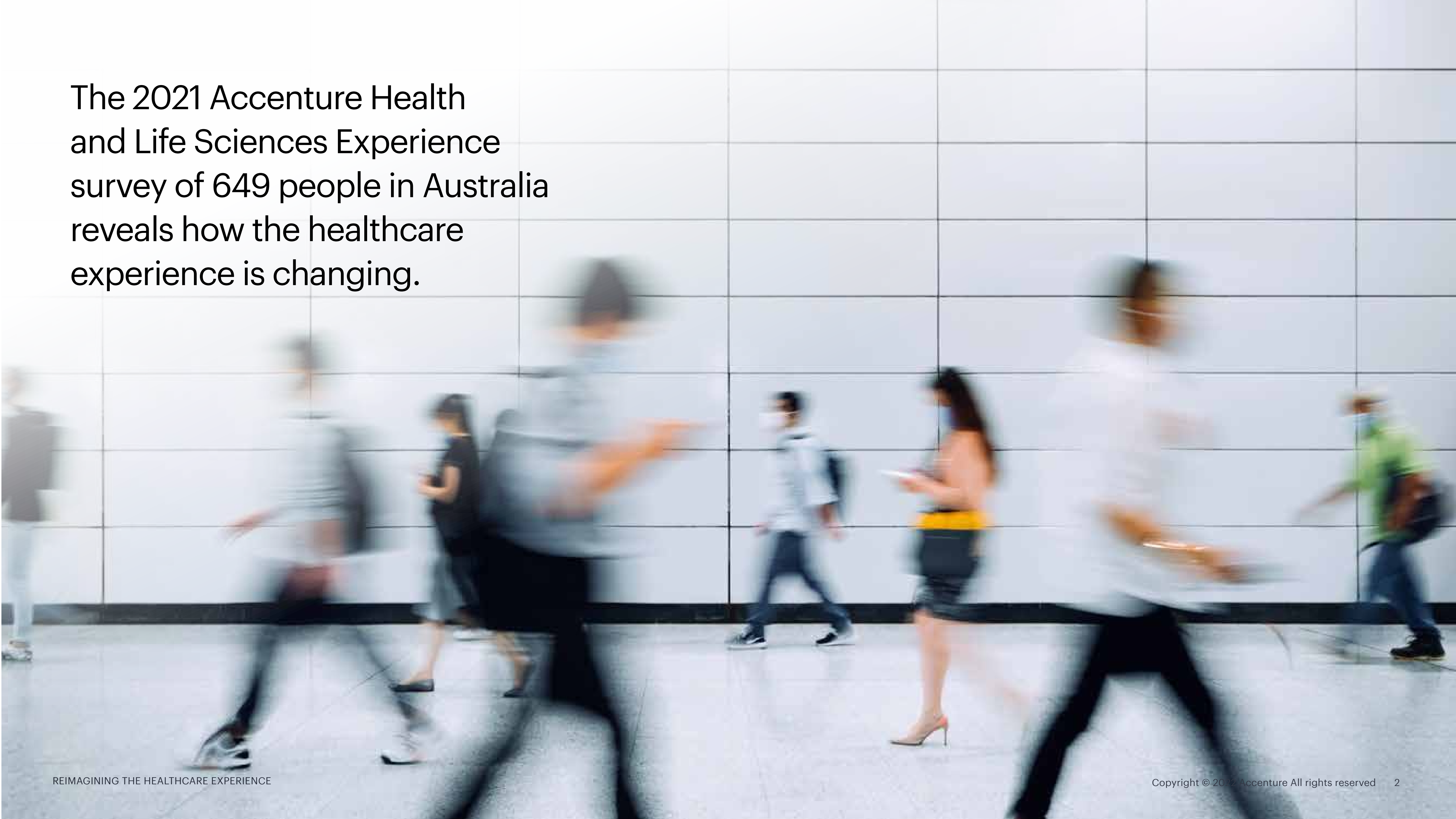
The 2021 Accenture Health and Life Sciences Experience survey of 649 people in Australia reveals how the healthcare experience is changing.



Key findings at a glance

Australians report relatively high satisfaction from their experiences with the healthcare system—but trouble navigating the complex system and the cost of services can lead to disengagement with the patient journey and cause delays in accessing care, potentially worsening health outcomes.

Understanding the experiences that Australians value most, from emotional support to increased convenience, will be critical in redefining people-centred healthcare services and maximising positive interactions with the healthcare system.

Accenture's 2021 Health and Life Sciences Experience survey[1] seeks to understand patient and consumer attitudes toward healthcare systems in Australia and around the world, in terms of access, technology adoption, service experience and trust.

[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. This report focuses on responses from 649 respondents in Australia, surveyed between June 1 and June 10, 2021.

> Many of those diagnosed with a health condition struggle to navigate the healthcare system: just 51% know who to talk to about different health issues or conditions, and 23% say they need more credible information and guidance managing their health.

These are some of the insights we found from respondents in Australia:

- **Australians are relatively satisfied with their healthcare experiences and access to care compared with other global respondents.** Positive experiences with the healthcare system are most often driven by clear communication and emotional support from medical providers, as well as affordability of services. Australian respondents are more likely than others surveyed to say they are satisfied with their access to medical providers and prescription medications.

- **Long waiting times, unhelpful medical advice and surprises at the cost of services can reduce engagement with the patient journey.** Few are unaffected by these negative healthcare experiences. For many, these situations made them stressed or upset, caused them to switch providers or treatments or made them less likely to seek out medical care the next time they needed it.

- **Lack of guidance and affordability issues disrupt quality services and can lead to inefficient healthcare experiences.** Many of those diagnosed with a health condition struggle to navigate the healthcare system: just 51% know who to talk to about different health issues or conditions, and 23% say they need more credible information and guidance managing their health. At the same time, a little over one-quarter of Australians believe the healthcare services and prescriptions they receive are overpriced, and 45% of those who could not afford their medical care ended up delaying a treatment or medication as a result.

- **Age influences healthcare needs, expectations and experiences.** Older respondents (i.e., Baby Boomers, 75 years and over)[2] tend to be more satisfied with their healthcare experiences and access to care, prioritise empathy and communication from their medical providers. They are more hesitant to use various digital technologies when compared with younger respondents (i.e., Millennials, Gen X).

- **Traditional providers are the most trusted practitioners of care and can leverage this trust to increase the uptake of digital technologies.** Many Australians say a recommendation from their doctor would make them more likely to use digital technologies to manage their health. This places general practitioners in a unique position to embed digital technologies into their treatment plans and explain the benefits these technologies offer to patients in terms of their health and well-being.

[2] Survey respondents represented a range of ages groups: Gen Z (ages 18–24), Millennials (ages 25–41), Gen X (ages 42–56), Baby Boomers (ages 57–74) and ages 75 or older.

Building human-centred healthcare experiences

Australians are happy with their healthcare experiences and access to providers and treatments relative to other global respondents. By understanding the moments that matter most to them, and designing services that centre on their unique needs and preferences, providers can continue to deliver positive experiences from the first steps of the patient journey.

Australian respondents are among the most likely in the survey to say they are satisfied with their access to medical providers (79%, vs. 67% globally) and prescription medications (80%, vs. 71% globally), with more than half (59%) saying their access to healthcare has not changed since the onset of the COVID-19 pandemic. And the vast majority are happy with their experiences seeking medical care, from finding a medical provider for their needs to handling post-appointment logistics (Fig. 1).

This trend applies to patient respondents[3] as well, most of whom say the steps along their patient journey have been working well, including finding the right provider for their needs (79%) and managing their healthcare appointment schedule (85%).

Most experiences with the Australian healthcare system are positive—but how can providers learn from people's expectations, optimise services to meet unique needs and deliver exceptional healthcare experiences?

Figure 1: Australians are more likely to be satisfied with their healthcare experiences than their global peers

Q. Think about your past experience(s) when you have sought medical care (e.g., needed to book an appointment for any reason, speak to a medical professional, arrange medication, etc.). Overall, how satisfied, if at all, are you with the following stages of seeking medical care?

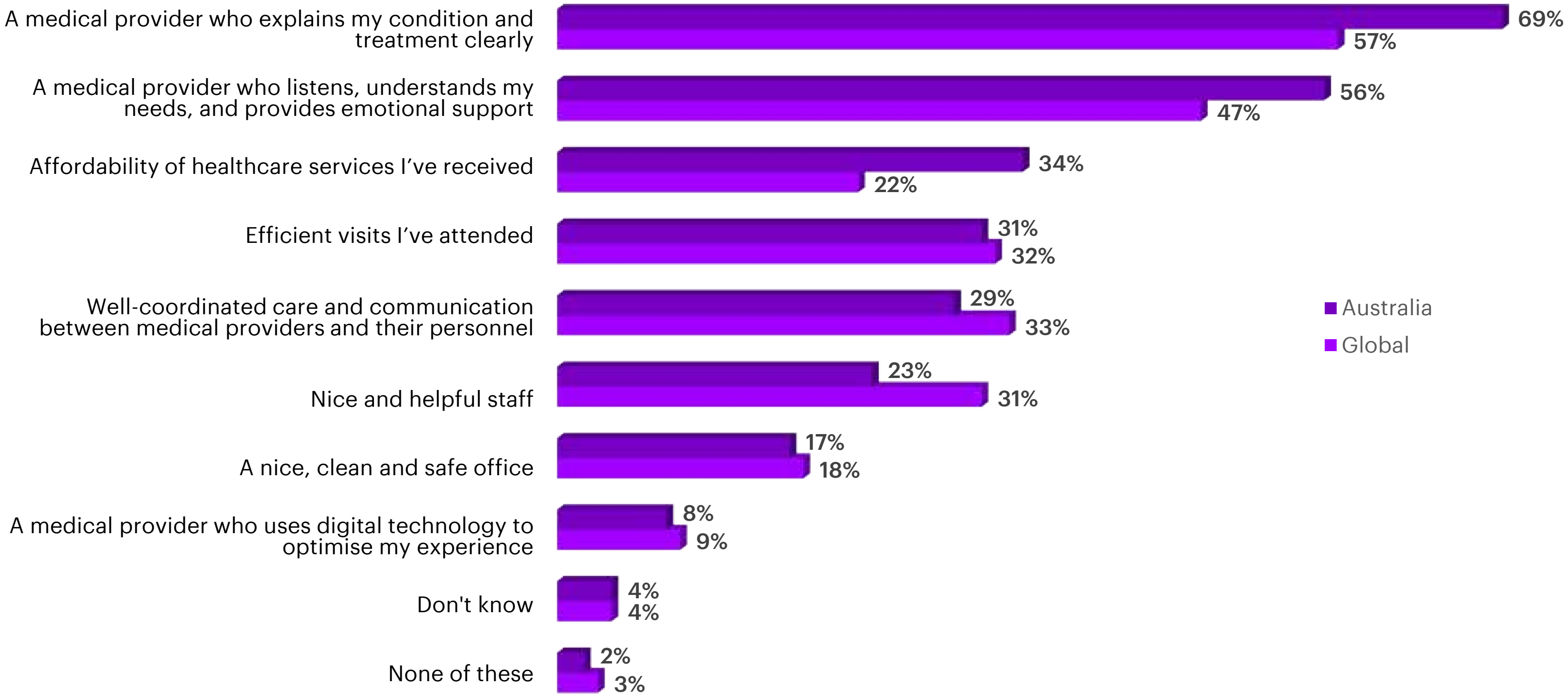
"Very satisfied" and "Satisfied" responses (Australia N=649; Global N=11,823)

[3]Patients are respondents who are diagnosed with a condition in at least one of the following six fields: oncology, cardiovascular, respiratory, rheumatology/immunology and inflammatory, gastroenterology and/or neurology.

For Australians, clear communication, empathy and affordability are top drivers of positive experiences with the healthcare system Fig. 2). The same applies for experiences with a medication plan: Australians value affordability (55% vs. 42% globally), how well the medication plan is understood (52% vs. 46% globally) and the convenience of getting that medication (49%). In fact, many of these factors are more important for Australians than for others surveyed, creating a clear opportunity for providers to prioritise these expectations when delivering healthcare services.

Figure 2: Clarity, empathy and affordability define positive healthcare experiences

Q. Which three, if any, of the following factors are most important for your positive experience with a medical provider?



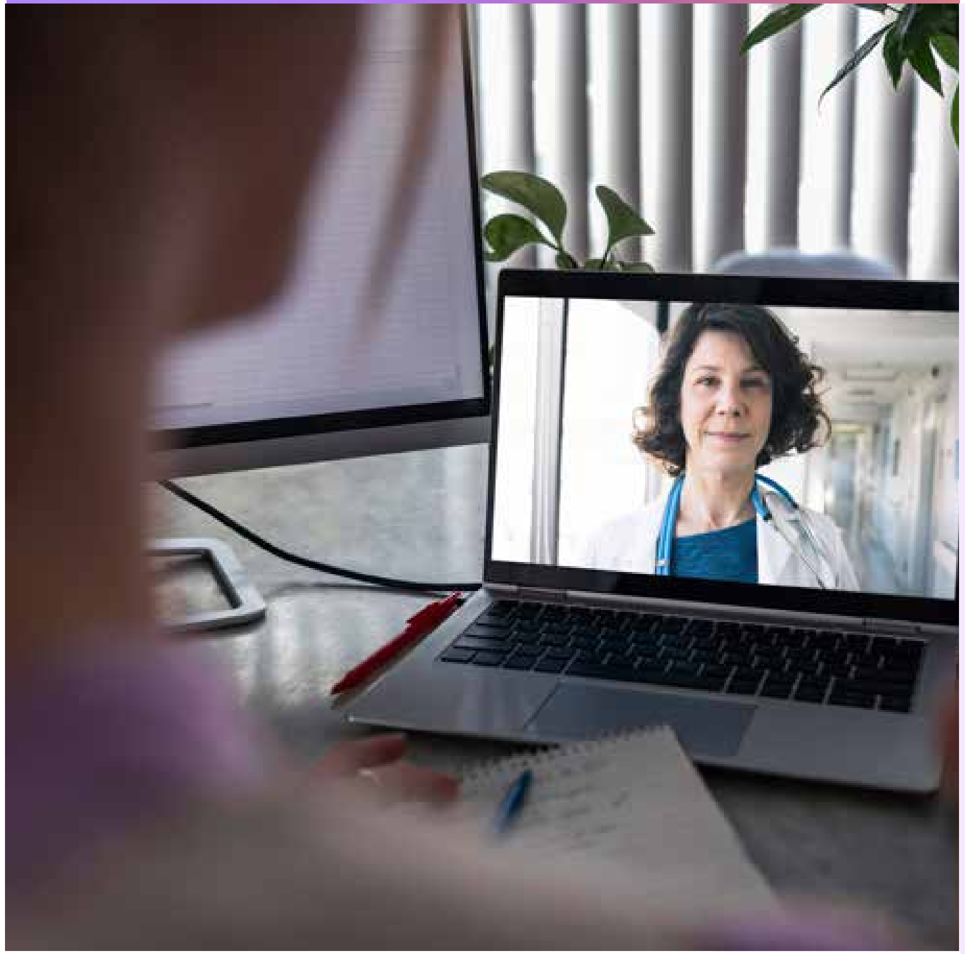
(Australia N=649; Global N=11,823)

Not addressing the needs that matter most to Australians can lead to negative experiences

Nearly four in 10 Australians (39%) say they have never had a negative experience with a medical provider, pharmacy or hospital—but those who have cite inefficient visits with long waiting times (37%), unhelpful medical advice (30%), surprise at the cost (28%), lack of emotional support (21%) and rude staff (21%) as the top reasons for their negative experience.

Nearly half (46%) of those who have had a negative experience say it made them stressed or upset, and many others switched medical providers or treatments (38%) or were less likely to seek medical care the next time they needed it (27%). Just 17% say their negative experience did not affect them in any way.

The ability to easily navigate the healthcare system is key for efficient and effective healthcare experiences. Yet only 51% of patient respondents know who to talk to about different health issues or conditions, and just 44% know which provider is best to treat their health issues or conditions. Nearly a quarter (23%) of patients say they need more credible information and guidance managing their health, and 18% say they need this guidance to understand their options for treatment, including clinical trials.



Providers and Payers have an opportunity to differentiate by helping Australians effectively navigate the healthcare ecosystem. Helping people understand their health issues and treatment plans while increasing their awareness of the healthcare options available to them can improve experiences with the system as a whole and lead to better health outcomes.

Investing in platforms that meet people's needs

As the Australian healthcare system adjusted its services to meet the restrictions brought on by the pandemic, people started using virtual care services for their healthcare needs—many for the first time.

These virtual appointments are popular among Australians: 29% of respondents have used virtual consultations to manage their health in the past year, and 33% (vs. 25% globally) have had a virtual care appointment with their primary care provider in the past year. Even those without virtual care experience are willing to explore virtual care in the future (Fig. 3).

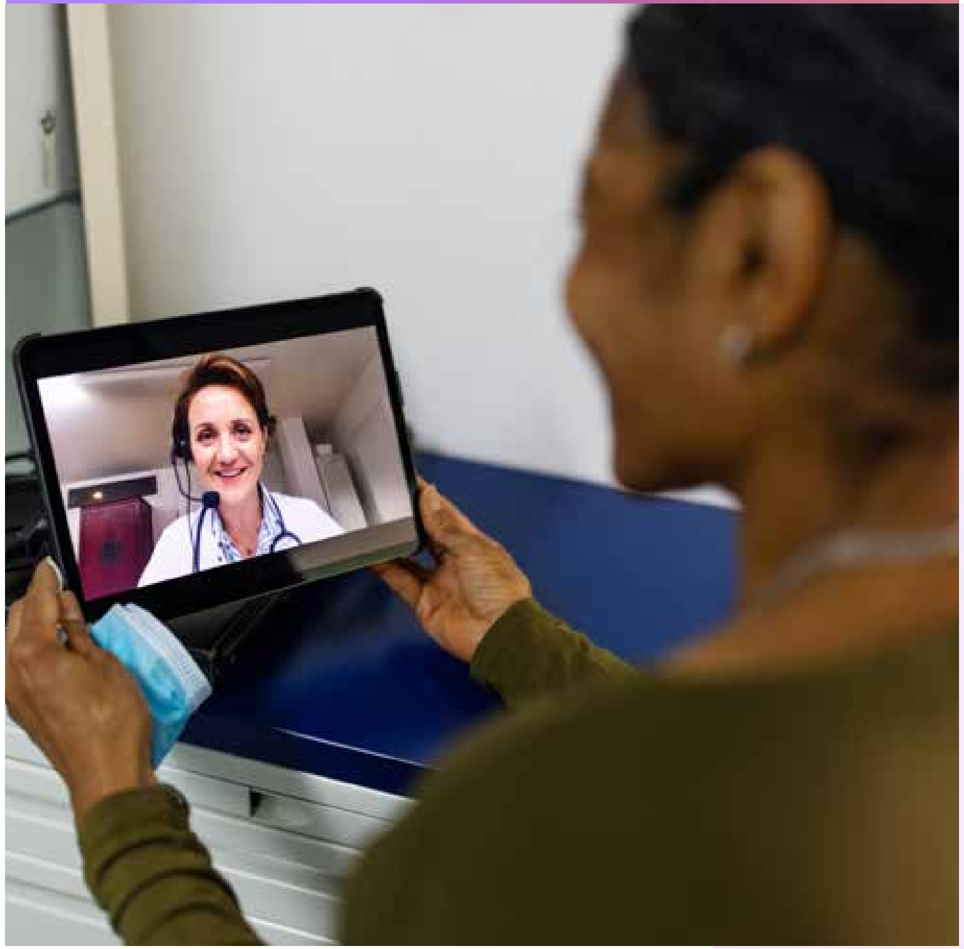
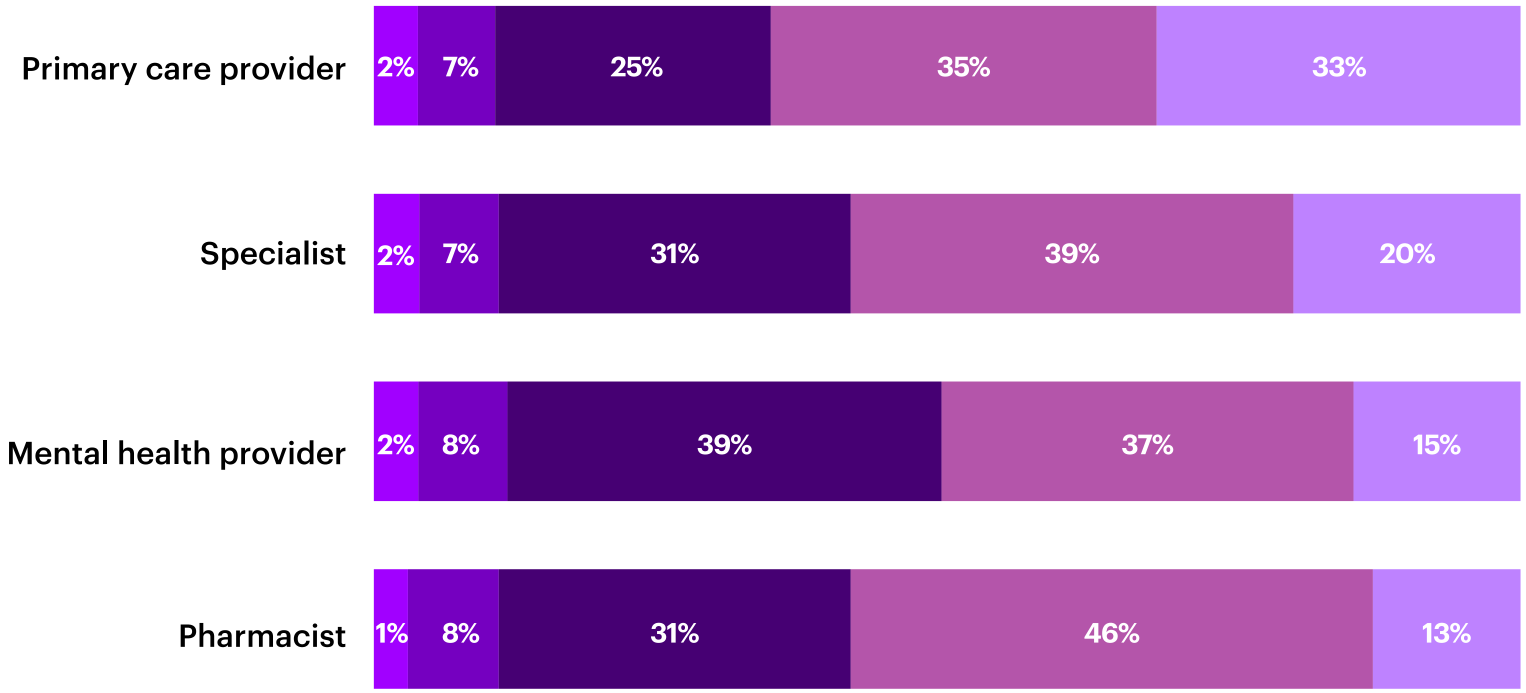


Figure 3: Virtual appointments are popular, and even those who have not tried them are willing to in the future

Q. Have you had a virtual care appointment with the following medical providers in the last year? If not, would you be willing to receive virtual care from that provider in the future?



Note: Numbers in figures may not add up to 100% due to rounding.

- Prefer not to say
- Don't know
- No, I have not had a virtual care appointment with this provider in the last year and would not be willing to in the future
- No, I have not had a virtual care appointment with this provider in the last year but would be willing to in the future
- Yes, I have had a virtual care appointment with this provider in the last year

(Australia N=649)

Virtual services can be a convenient form of healthcare for Australians; investing in these platforms can improve efficiency, increase accessibility and result in better experiences for many. A little over one-third (34%) say they would be willing to see their medical provider virtually to save time, and 20% say they would try virtual care if it was more affordable than in-person visits.

Motivations for using digital technologies tie back to people's expectations for efficiency and convenience: many would use these tools to receive their prescriptions (48%), avoid in-person contact during the pandemic (43%), receive care in a medical emergency (34%), treat or manage chronic conditions (30%) or expand access to their preferred medical doctors and treatments (29%).

The opportunity to increase the adoption of virtual care and other digital technologies is clear: many are open to trying these tools if they offer convenience and improve their overall healthcare experience.

Modernising healthcare payments to improve access

Healthcare experiences are largely positive for most Australians, but access issues can disrupt these quality services and worsen health outcomes.

Cost is a common reason behind negative experiences, and those who are unable to afford their medical care tend to disengage from their patient journey to some extent.

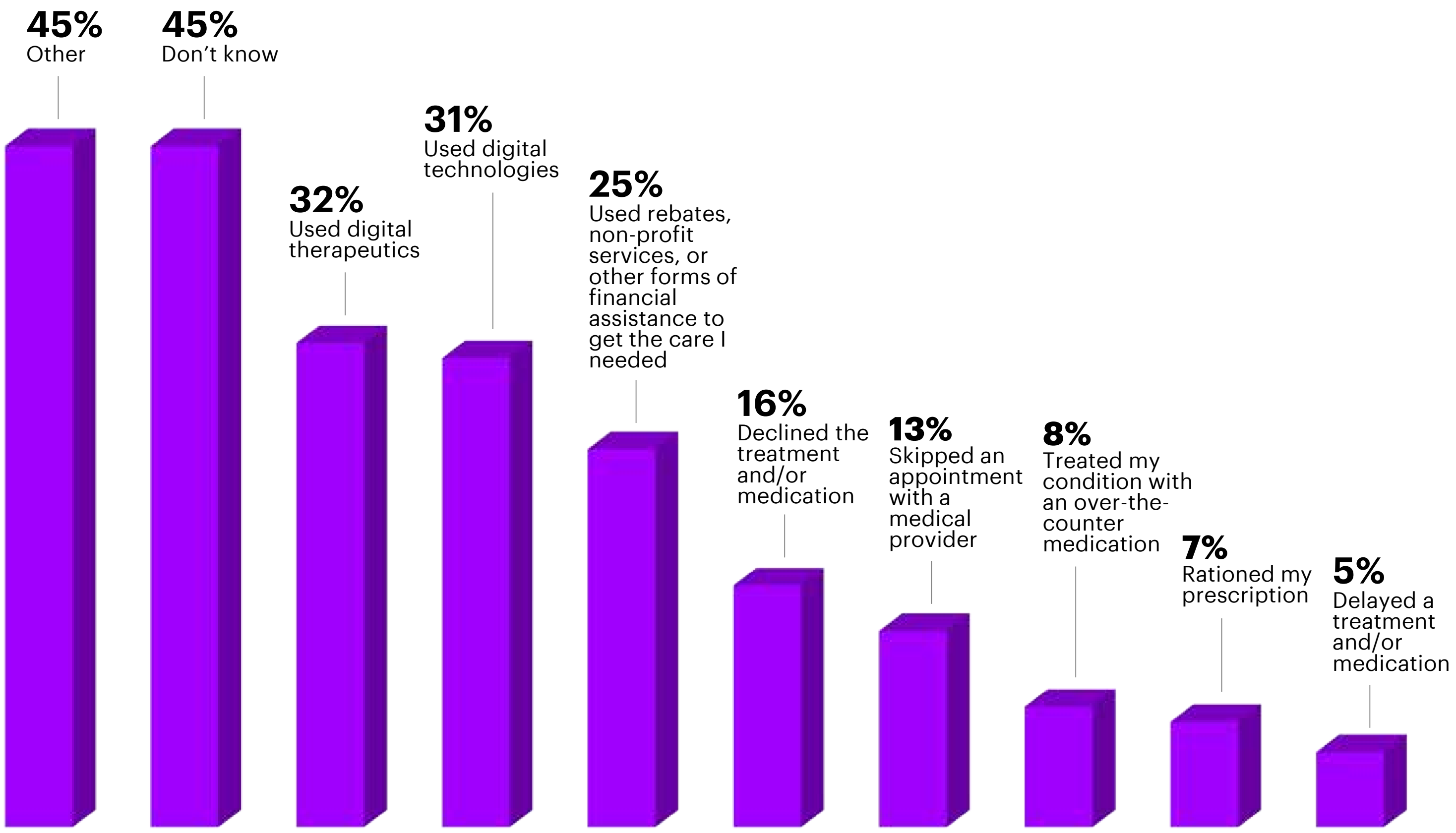
Addressing these access issues is a critical step to building positive, efficient experiences for Australians and mitigating the potential exacerbation of illnesses.

Despite being more likely than others to report high quality of life indicators—including stable housing and reliable transportation to medical appointments—half of Australians say they have struggled to afford their medical care, and 26% believe the healthcare services and prescriptions they receive are overpriced.

These affordability issues can lead to undesirable healthcare decisions, such as delaying treatments or skipping appointments (Fig. 4). These choices can have a material impact on healthcare outcomes and can potentially increase overall costs to the healthcare system over time. Further detailed investigation is required to understand the impact of this finding.

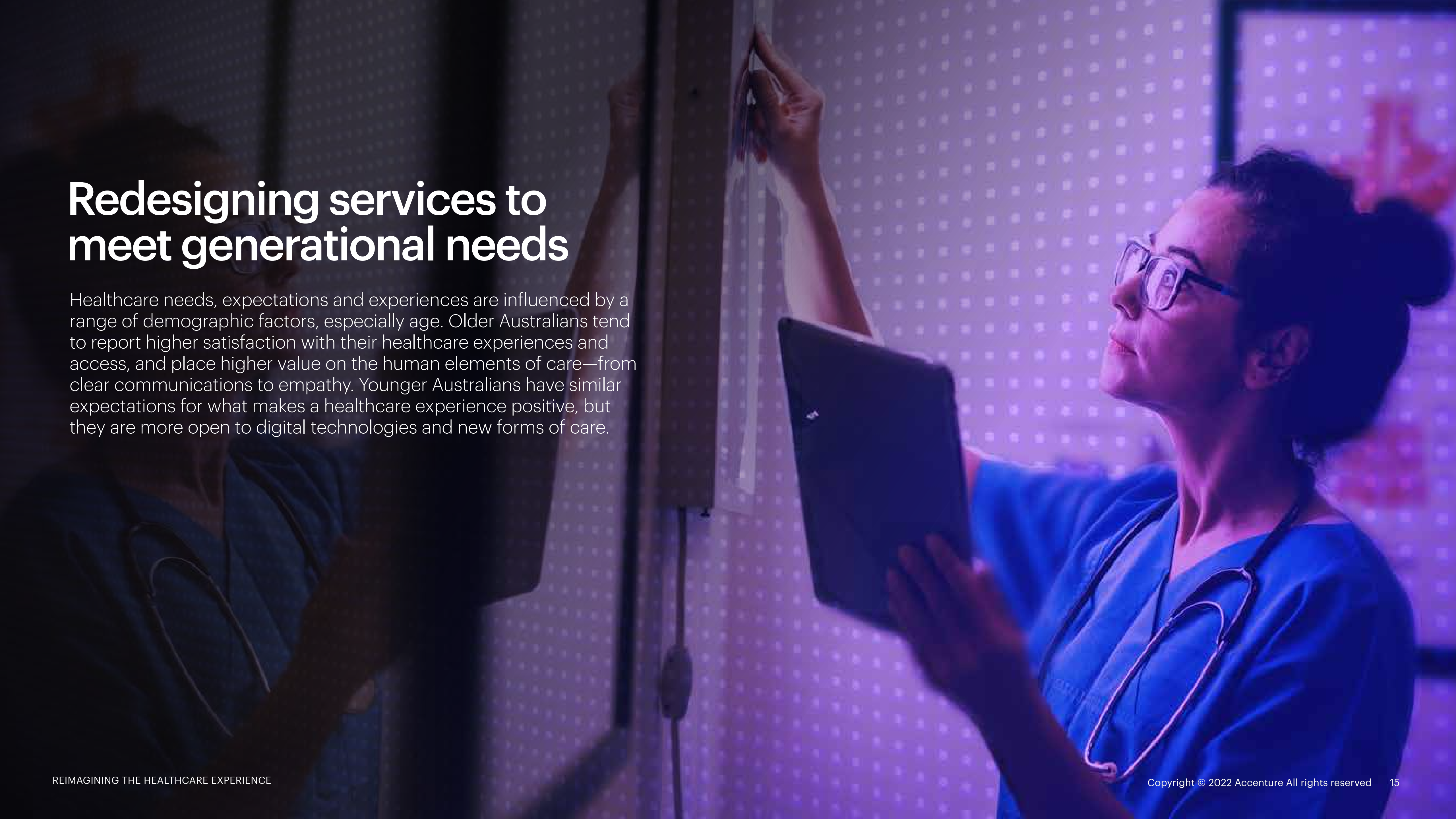
Figure 4: Access issues can prevent people from getting the care they need

Q. Which, if any, of the following have you ever personally done when you could not afford either medical care or medications? Select all that apply.



"Not applicable – I have never not been able to afford either medical care or medications" responses excluded

(Australia N=322)



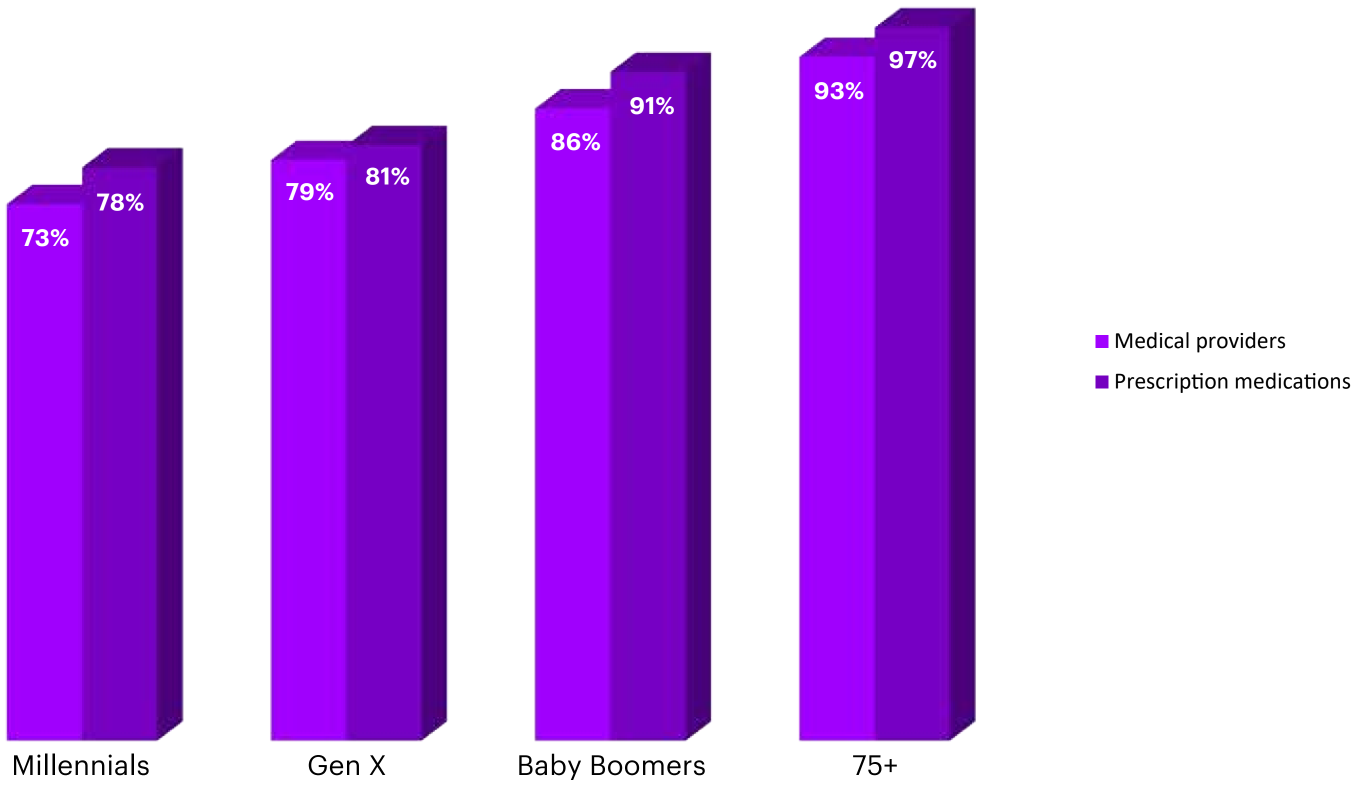
Redesigning services to meet generational needs

Healthcare needs, expectations and experiences are influenced by a range of demographic factors, especially age. Older Australians tend to report higher satisfaction with their healthcare experiences and access, and place higher value on the human elements of care—from clear communications to empathy. Younger Australians have similar expectations for what makes a healthcare experience positive, but they are more open to digital technologies and new forms of care.

Baby Boomers and those 75 years or older tend to be more satisfied with their access to medical providers and prescription medications. They are also more likely to say their access to healthcare has not changed since the onset of the COVID-19 pandemic (see Fig. 5).

Figure 5: Satisfaction with access to healthcare varies by age

Q. How satisfied or dissatisfied are you with your current access to each of the following areas of healthcare?

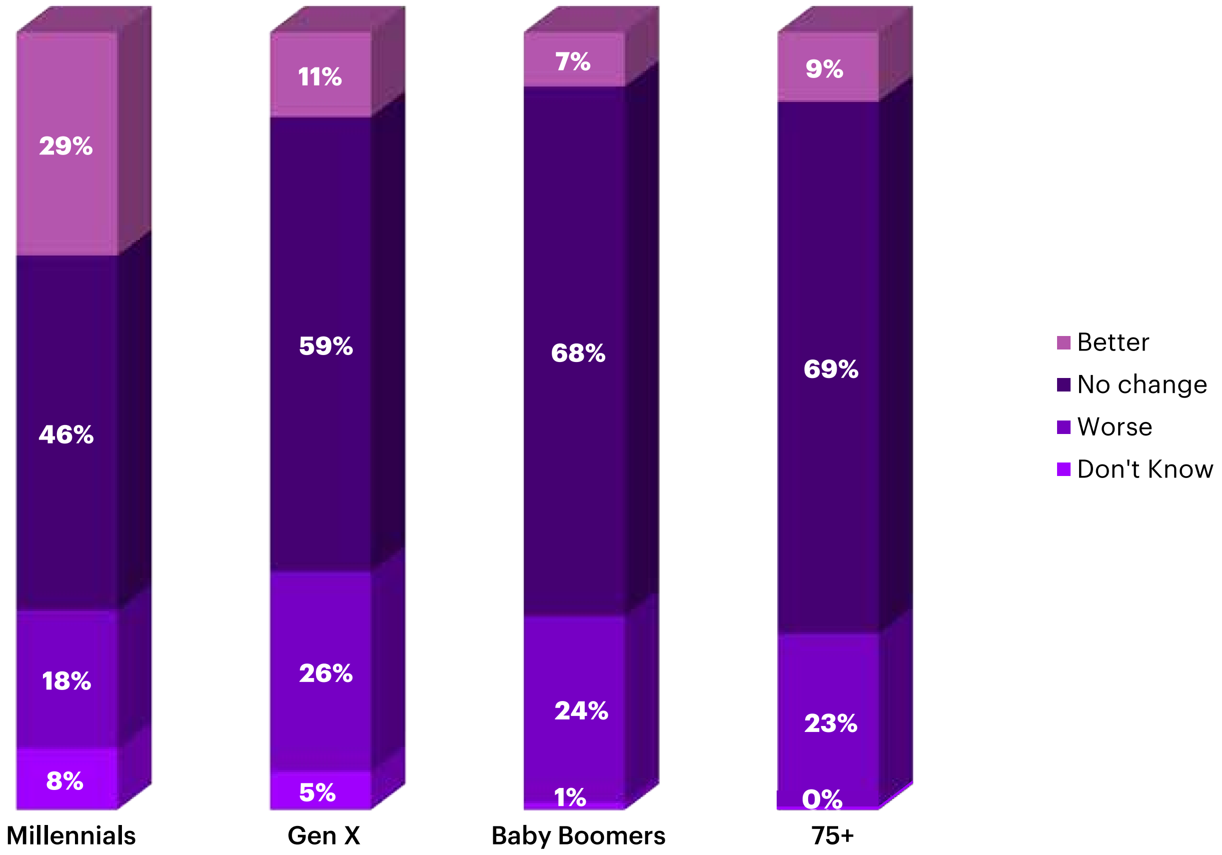


"Very satisfied" and "Fairly satisfied" responses combined; "Not applicable – I never use this" responses excluded

Accessibility translates to better experiences with the healthcare system overall. Nearly half (48%) of Baby Boomers and 61% of those 75 years or older say they have never had a negative healthcare experience, compared with just 27% of Millennials and 37% of Gen Xers.

Figure 5A: Satisfaction with access to healthcare varies by age

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



Note: Numbers in figures may not add up to 100% due to rounding.

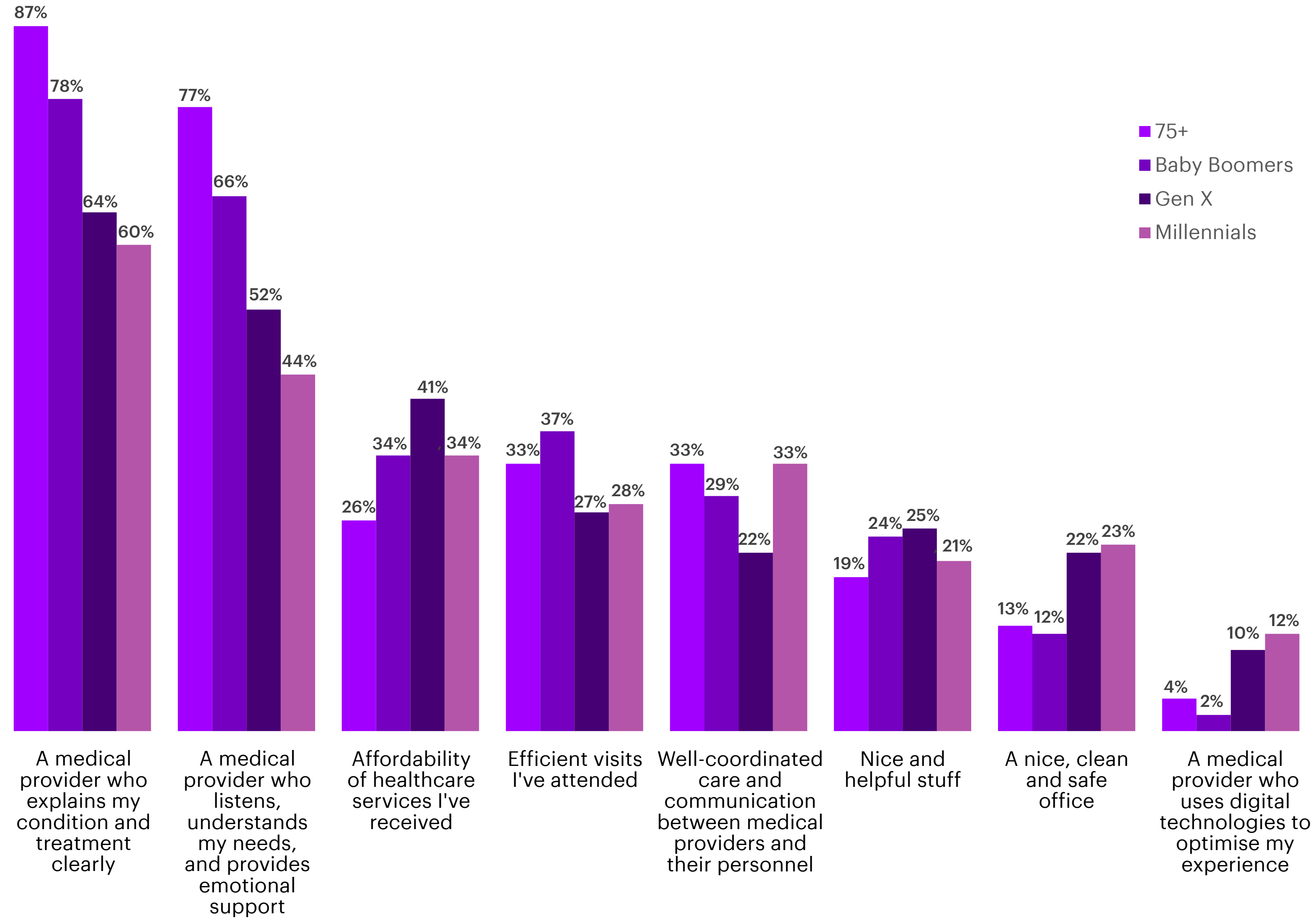
When it comes to defining a positive healthcare experience, clear communication and empathy are valued across respondents of all ages—but older generations tend to place higher importance on these factors.

Having a medical provider who clearly explains conditions and treatments is the most important factor for a positive healthcare experience for all respondents, but even more so for older generations. Similarly, having a medical provider who listens, understands needs and provides emotional support is a higher priority for older respondents (Fig. 6).

Just 8% of Australians say digital technologies to optimise their experience is an important factor for a positive healthcare experience, but the generational divide is clear: Millennials and Gen Xers are more likely than older respondents to take note of these technologies (Fig. 6).

Figure 6: Older respondents emphasise the importance of communication and empathy

Q. Which three, if any, of the following factors are most important for your positive experience with a medical provider?

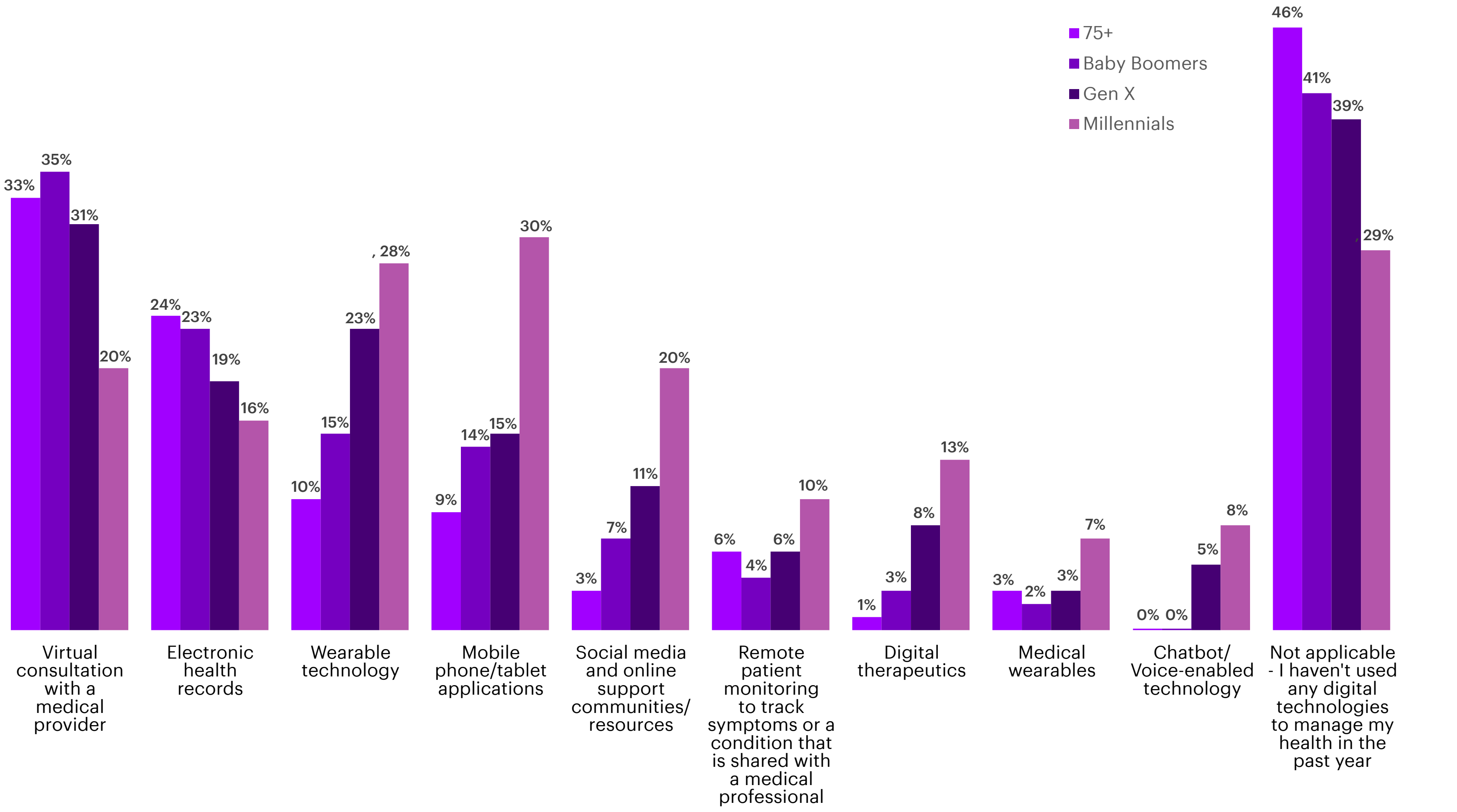


“None of these” and “Don’t know” responses not shown

This divide also applies to the use of digital technologies for health management. Those 75 years or older, Baby Boomers and Gen Xers are more likely than Millennials to say they have not used any digital technologies to manage their health in the past year. With the exception of virtual consultations and electronic health records, Millennials tend to lead the way when it comes to the adoption of various digital technologies (see Fig. 7).

Figure 7: Age influences the uptake of digital technologies

Q. Which, if any, of the following digital technologies have you used to manage your health in the past year? Select all that apply.



"Other" and "Don't know" responses not shown

Integrating care with digital technologies

Increasing the adoption of digital technologies, both among patients and within the healthcare ecosystem, is essential to creating efficient, high-quality and cost-effective experiences.

Electronic health records are now readily accessible for Australians, with 29% of Australian patient respondents using them to manage their health over the past year

Accessible to both patients and providers, these digital records include patients' discharge summaries, allergies, medications and other important information about their health history. They also enable seamless data-sharing across various providers, from general practitioners and specialists to hospitals, improving the efficiency of services and quality of care.

But a digitally enabled, efficient healthcare system will require more than just the widespread adoption of electronic health records. For example, intelligent technologies, such as those enabled by artificial intelligence (AI) and machine learning (ML), can increase the speed and accuracy of diagnoses, improve treatment plans and help prioritise patient-provider quality time.

When it comes to applications of intelligent technologies in healthcare, more than half of Australians are comfortable having a doctor who uses AI and ML for administrative purposes such as note-taking and electronic health record updates (64%) or a doctor who uses AI and ML to aid in diagnosis and treatment decisions (55%). Comfort levels drop for more advanced uses of AI, but they are still relatively high: 40% are comfortable using an app powered by AI to determine if they need a diagnosis, while 45% are comfortable using digital technology and AI to get a diagnosis, treatment or to participate in a clinical trial. This suggests a growing opportunity to invest in intelligent healthcare services, benefiting both providers and patients alike.

Low trust is a barrier to the adoption of digital technologies

The most popular technologies used to manage health in the past year were virtual consultations (29%), wearable technologies (20%), electronic health records (20%) and mobile applications (19%). Furthermore, some Australians turned to digital therapeutics (7%), perhaps for the potential to improve their health outcomes while also enabling a convenient and lower cost treatment option.

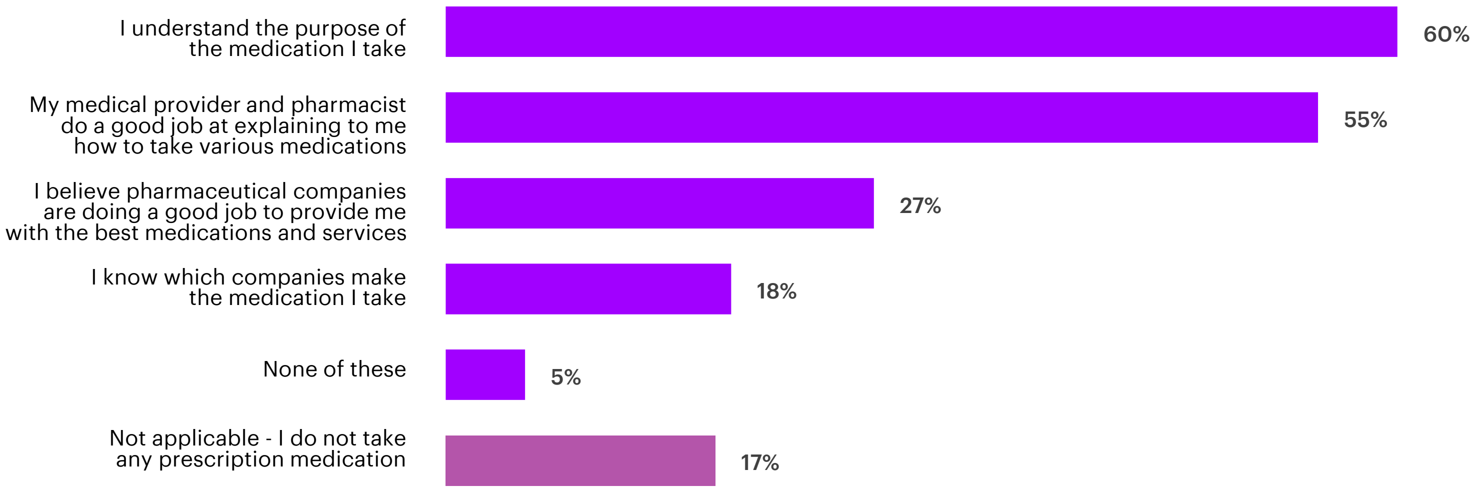
While nearly a third of Australians used mobile applications (32%) in our pre-pandemic 2020 survey of digital health adoption, far fewer relied on digital therapeutics (3%), virtual consultations (6%), and wearable technologies (17%). Continuing to build trust in various healthcare players can help increase the adoption of these technologies over the coming years.

Australians in our survey overwhelmingly trust information from their healthcare providers (89%), but less so from their government (57%), pharmaceutical companies (57%) and health insurance companies (49%).

Half say they have not had a virtual appointment with a technology company and would not be willing to in the future, while their openness to trying virtual care with other providers is much higher (Fig. 3). People are hesitant to trust pharmaceutical companies, too: less than a quarter believe they market products in a trustworthy manner (Fig. 8).

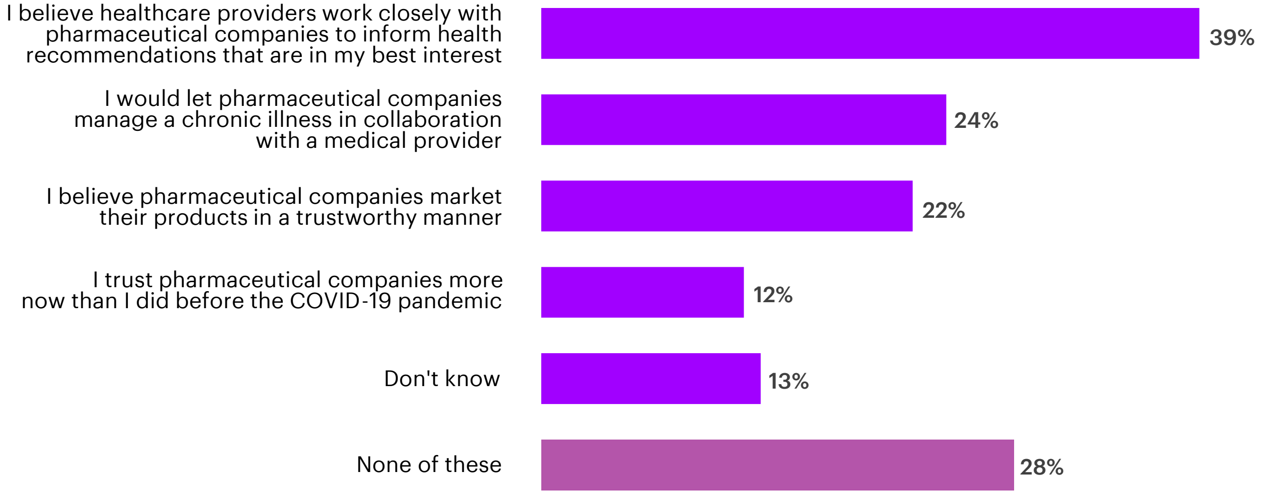
Figure 8: Trust in pharmaceutical companies is low

Q. Which, if any, of the following statements apply to you? Select all that apply.



(Australia N=649)

Which, if any, of the following statements apply to you? Select all that apply.



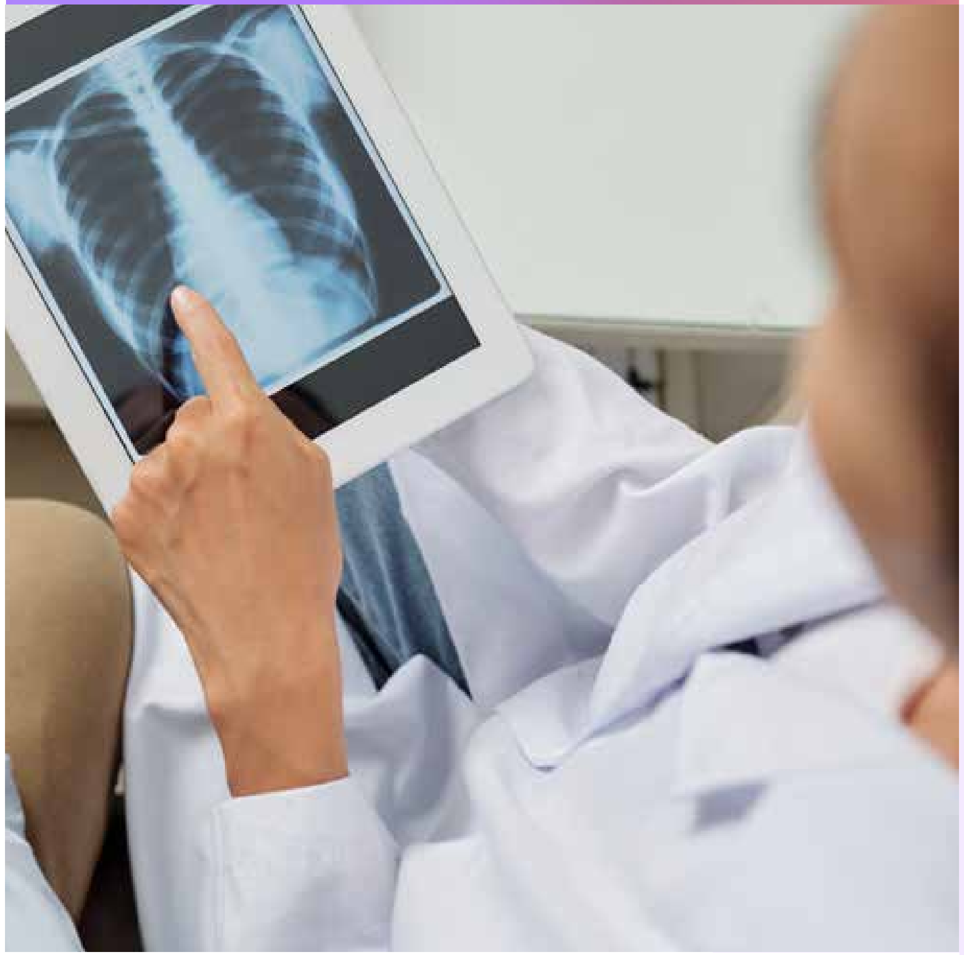
(Australia N=649)

Over half of respondents say their medical provider and pharmacist do a good job explaining how to take various medications—but just 27% believe pharmaceutical companies are doing a good job providing them with the best medications and services (Fig. 8). There is a disconnect between people's trust in pharmaceutical companies and the treatments they provide, but increased collaboration between trusted medical providers and the pharmaceutical industry could help close this gap.

Since data privacy is a priority for Australians, low confidence in a provider's ability to secure this data could influence engagement levels. A majority of Australians say the increase in virtual care due to the pandemic made them consider their data privacy and security needs (63%) and that they should have the right to approve the collection and usage of their personal health information for any reason beyond their treatment (71%, vs. 63% globally).

Australians trust their healthcare providers (85%, vs. 79% globally) and pharmacies (77%, vs. 71% globally) to keep their digital healthcare information secure—but this trust drops for their government (53%), health insurance companies (46%), pharmaceutical companies (46%) and technology companies (39%).

These companies have an opportunity to build trust in and engagement with their products and services if they prioritise data privacy and security.



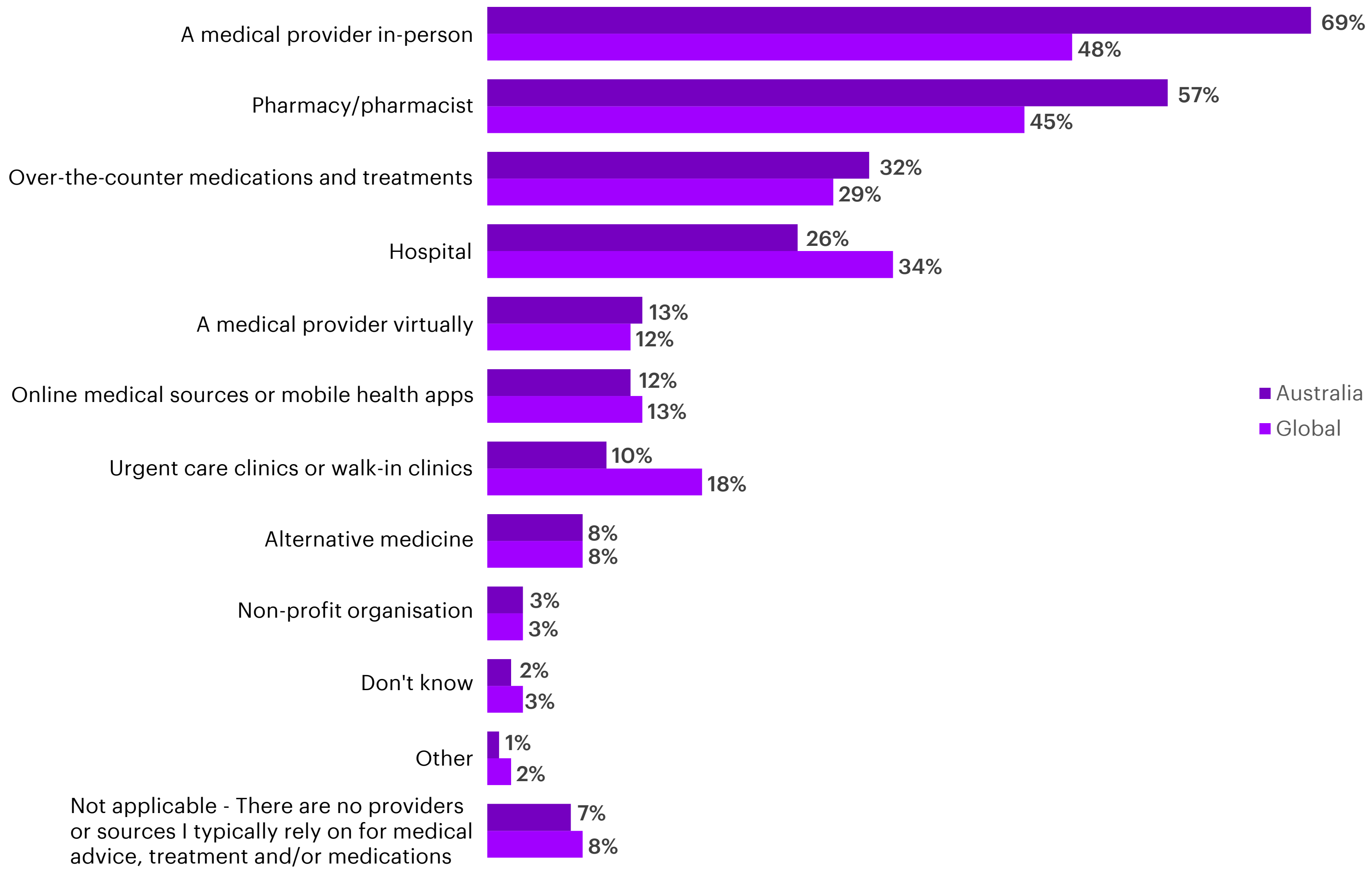
Leveraging trust to optimise the healthcare ecosystem

Australians trust their traditional medical providers for their healthcare needs and look to them for guidance on their healthcare decisions. Providers can leverage this trust to increase the uptake of digital technologies among their patients and boost people's trust in technology and pharmaceutical companies.

When it comes to seeking medical advice, treatments and medications for their acute needs, Australians are more likely than others to say they rely on seeing their medical provider in person and their pharmacies. They also turn to over-the-counter medications (Fig. 9).

Figure 9: People turn to their traditional medical providers for their healthcare needs

Q. Which three, if any, of the following providers and sources do you typically rely on for medical advice, treatments and/or medications for a non-life-threatening, acute healthcare need?



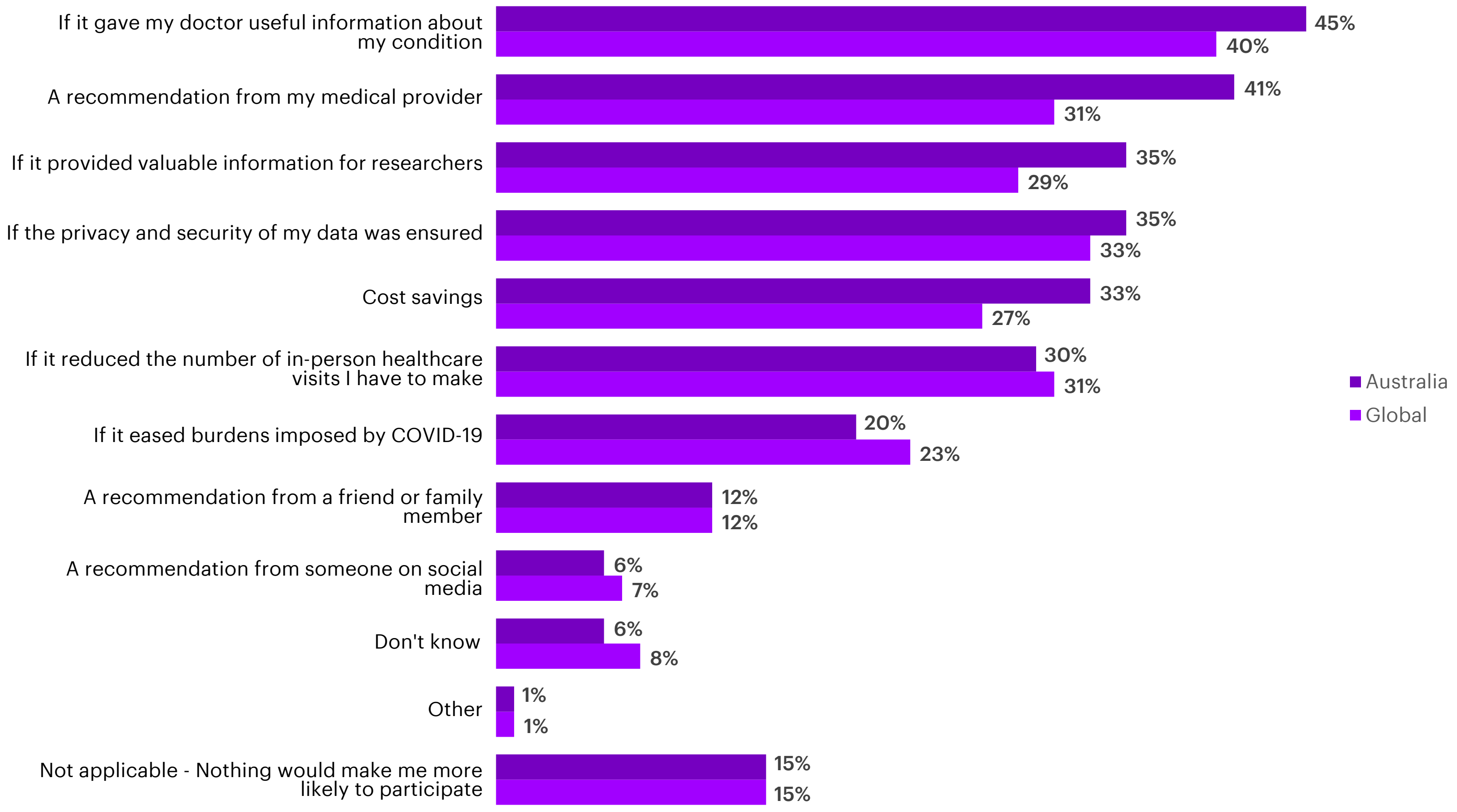
(Australia N=649; Global N=11,823)

Despite their preference for traditional care, Australians are open to integrating digital technologies into their health routines. For instance, people would be more likely to participate in a program that helped them manage their health condition digitally if it gave their doctor useful information about their health, or if their doctor recommends it (Fig. 10).

Similarly, Australians would be more likely to use digital technology to manage their health if they received a recommendation from their provider (38%), if it gave them better information about their health (29%) or if they had more confidence in their data security (29%). Roughly a quarter (24%) said they would use digital technologies if they knew more about the options available to them—further emphasising the importance of a provider's role to increase awareness of these technologies.

Figure 10: People want guidance from their providers on using digital health technologies

Q. Imagine you were invited to participate in a program that helped you manage a health condition you might have through your computer, smartphone or another digital device. For example, you might get reminders to take your prescription or advice on how to improve your condition. Which four, if any, of the following would make you more likely to participate in this program?



(Australia N=649; Global N=11,823)

Integrating pharmaceutical companies into the healthcare ecosystem will be a challenge, but involving trusted medical providers could boost engagement with these companies and their products (i.e., digital therapeutics)

In fact, Australians would consider allowing their medical provider to share their data with pharmaceutical companies for a number of benefits, including to improve their health and the effectiveness of medications (53%, vs. 45% globally), to help develop new medications and treatments (41%), to gather evidence about treatment efficacy (39%) and to better understand their health (38%).

Some would even use digital therapeutics along their patient journey—for example, for disease monitoring of an ongoing illness (34%) or in conjunction with prescribed medications or treatments (39%)—which could improve the flow of data between providers and patients and lead to more accurate diagnoses and treatment options.

Conclusion

We recommend the following actions to build a digitally enabled, patient-centred healthcare system:

Government and healthcare players across the ecosystem each have a role to play in building a system that balances cost of delivery with access to services and quality of outcomes - all while considering patients' unique needs and expectations.

- **Design human centred services that are aligned with needs and expectations.** The diverse segments of our community have differing needs from the health system. Taking note of these differences will be key to designing truly human-centred healthcare services and experiences. For example, older Australians (i.e. Baby Boomers and those aged 75 or older) are more likely than younger Australians (i.e., Millennials and Gen Xers) to report higher satisfaction with their healthcare experiences and access to services, and they place more importance on the need for a provider who is empathetic and communicates clearly. At the same time, their use of digital technologies to manage their health is low relative to younger respondents, especially Millennials - who tend to value convenience over empathy. Guidance on access to appropriate healthcare services based on health conditions, and the use of those services need to be tailored to individual needs and context.
- **Identify and address affordability and system inefficiencies.** Australians are more concerned than people in many other countries regarding the affordability of certain healthcare services and access to these services. At face value, this is concerning and needs further investigation - particularly given affordability issues cause some people to delay access to care, which may impact overall health and wellness.
- **Provide guidance around digital health technologies to increase adoption rates.** People are open to using digital technologies, especially if they help deliver better health outcomes, increase efficiency and convenience, and potentially save on costs - but trust and security are barriers. Many are looking to their trusted medical providers for recommendations and guidance around which technologies to use. Providers have the opportunity to boost the uptake of digital among their patients, by embedding digital as part of diagnosis and treatment plans and providing guidance on the use of digital to support more efficient and seamless experiences across the healthcare system.

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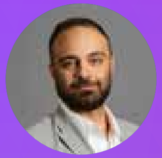

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About the 2021 Accenture Health and Life Sciences Experience Survey

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), China, (806), Finland (662), France (822), Germany (872), India (873), Ireland (657), Italy (718), Japan (833), Norway (648), Singapore (653), Spain (675), United Kingdom (1,200) 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 survey was fielded and analysed during May and July 2021.

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

Thanks to YouGov for carrying out the fieldwork.

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