salesforce research

INDUSTRY RESEARCH

CONNECTED HEALTHCARE CONSUMER

Insights from nearly 6,000 individuals worldwide on their expectations of the healthcare and life sciences industries

About This Report

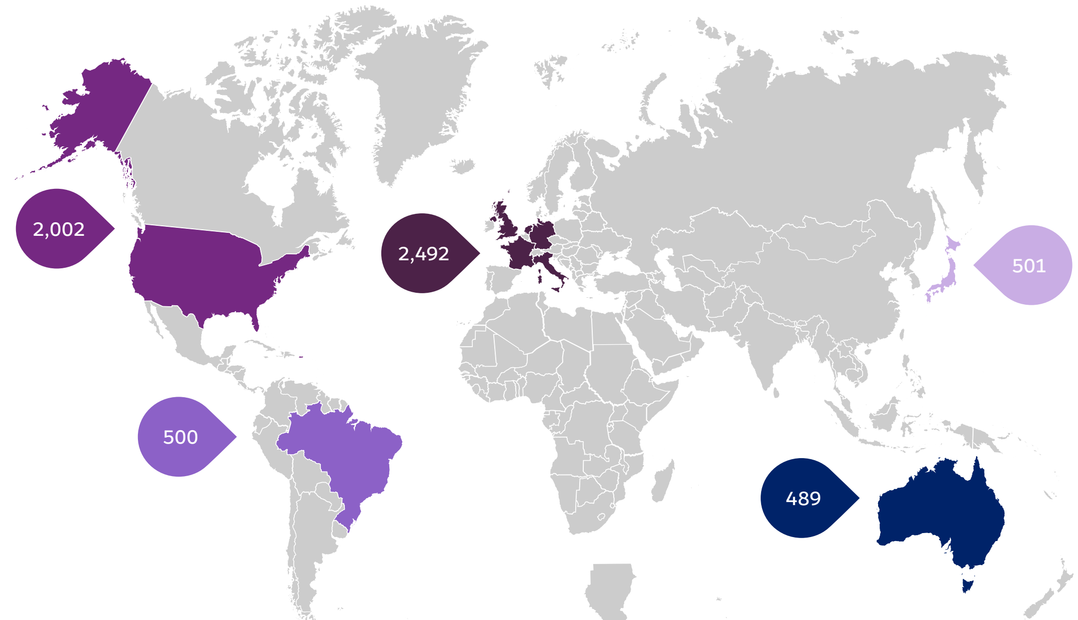
Salesforce Research surveyed nearly 6,000 consumers worldwide on their experiences with providers, insurers, and pharmaceutical and medical device companies and discovered:

- Common challenges to receiving care
- Consumers' desire for real-time communication
- Ways to build trust – and which factors make consumers more comfortable with sharing data
- Opinions on emerging trends in healthcare and the growth of artificial intelligence (AI)

Data in this report is from a double-blind survey conducted from July 23 through August 15, 2019, that generated responses from 5,984 individuals across North America, Latin America, Europe, and the Asia Pacific regions.

All respondents are third-party panelists (not limited to Salesforce customers). See page 38 for detailed respondent demographics.

Due to rounding, not all percentage totals in this report equal 100%. All comparisons are made from unrounded numbers.



Salesforce Research provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.

About This Report

We examine consumer expectations and experiences across four healthcare and life sciences sectors:

Provider

A person *(e.g., a doctor or nurse)* or organization *(e.g., a hospital or clinic)* that provides healthcare services

Insurer

Also known as a payer, an insurer is a private company or government entity that takes care of financial/operational aspects of providing healthcare to individuals and families through a health plan

Pharmaceutical Company

An organization licensed to research, develop, and manufacture drugs for use as medications

Medical Device Company

An organization that manufactures and distributes devices for medical use, such as hearing aids, pacemakers, prosthetics, blood pressure monitors, and others

We also examine survey results across three generations of healthcare consumers. Respondents were required to be 18 years of age or older.

Millennials/Gen Zers

Born between 1981 and 2000

Gen Xers

Born between 1965 and 1980

Silents/baby boomers

Born before 1965

Contents

Executive Summary

Healthcare and life sciences are in the midst of unprecedented transformation. As the world becomes more digitized, consumer power is growing, and expectations are changing for providers, insurers, and pharmaceutical and medical device companies.

Many healthcare consumers have navigated a fragmented landscape where communication is impersonal and transactions are complicated and time-consuming.

Consumers are excited by emerging solutions that hold the promise for expanding access to and quality of care. To unlock the full potential of these data-powered technologies, the healthcare and life sciences industries must work toward building consumer trust.

01 Healthcare Contends with Evolving Consumer Expectations

(See page 6)

Personalized experiences in industries like retail are elevating expectations for connectivity and digitalization. However, healthcare and life sciences are fragmented, and consumers often take the wheel to manage their own care. **Forty-seven percent of consumers believe healthcare and life sciences are more focused on industry needs than patient needs.**

02 Definition of a Great Experience Varies by Sector

(See page 10)

Consumers have different expectations of the healthcare and life sciences sectors, but common themes emerge, such as a demand for more follow-up, clarity, and personalization. **Only 40% of consumers say the communications they receive from the healthcare and life sciences industries feel relevant to them.**

03 Healthcare Consumer Engagement Goes Digital

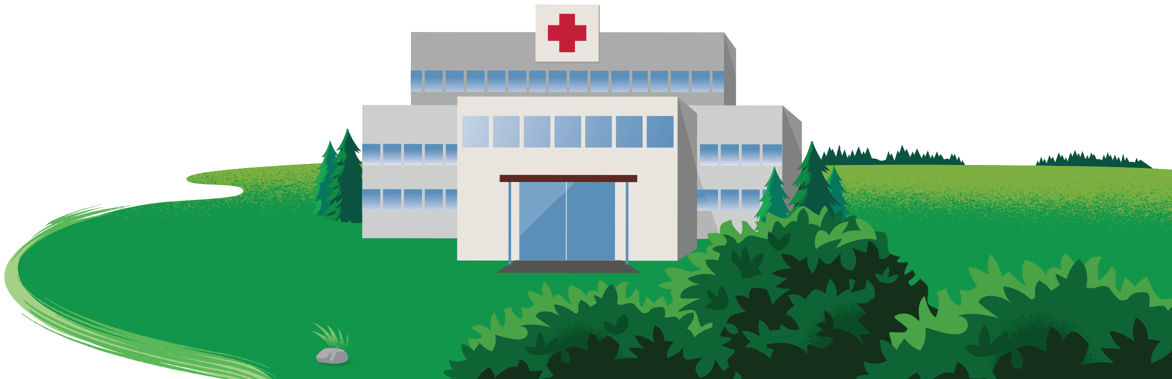
(See page 15)

Consumers – younger generations in particular – want on-demand, personalized experiences. They appreciate digital channels that make care more accessible, like instant messaging, video chat, and patient communities. **Eighty-two percent of consumers say it's important to offer personalized web portals.**

04 Trust Takes Priority as Health Tech Matures

(See page 20)

Consumers are interested in emerging technologies that promise to make care more accessible. However, a trust gap is keeping these technologies from realizing their potential. **Fifty-one percent of consumers are concerned about the future of privacy in healthcare as technology evolves.**



01
Healthcare Contends with Evolving Consumer Expectations

Connectivity – defined by continuous and immediate access to information – has elevated consumer expectations. Today, businesses across sectors operate in a landscape where consumer experience is as important as products and services, prompting the rethinking of how to engage and empower consumers.

The healthcare and life sciences industries are not immune to this shift. Nearly seven in 10 consumers say one extraordinary experience raises their expectations of all other companies – regardless of industry. The patient or member receiving personalized, proactive engagement from retailers, for instance, may wonder why their provider, their insurer, or other parts of the healthcare and life sciences ecosystem can't do the same.

However, creating an experience up to modern standards is a tall order. Separate, highly specialized entities are asked to work together – often under heavy regulation – to guide and track a patient through an integrated continuum of care. Market and regulatory incentives are sometimes at odds with the entire ecosystem working together. **Almost half of consumers – including 57% of Americans – say the healthcare and life sciences industries are more focused on their own needs than those of patients,** indicating ample room for improvement.

Healthcare Is at a Pivotal Moment as Consumer Expectations Soar

* *"State of the Connected Customer," Salesforce Research, June 2019.*

01
Healthcare Contends with Evolving Consumer Expectations

Digitally savvy consumers are increasingly self-managing and advocating for their own care. Armed with more resources than ever – and a belief that they'll get better care by using them – consumers are researching symptoms, available treatments, providers, and more before they contact a professional.

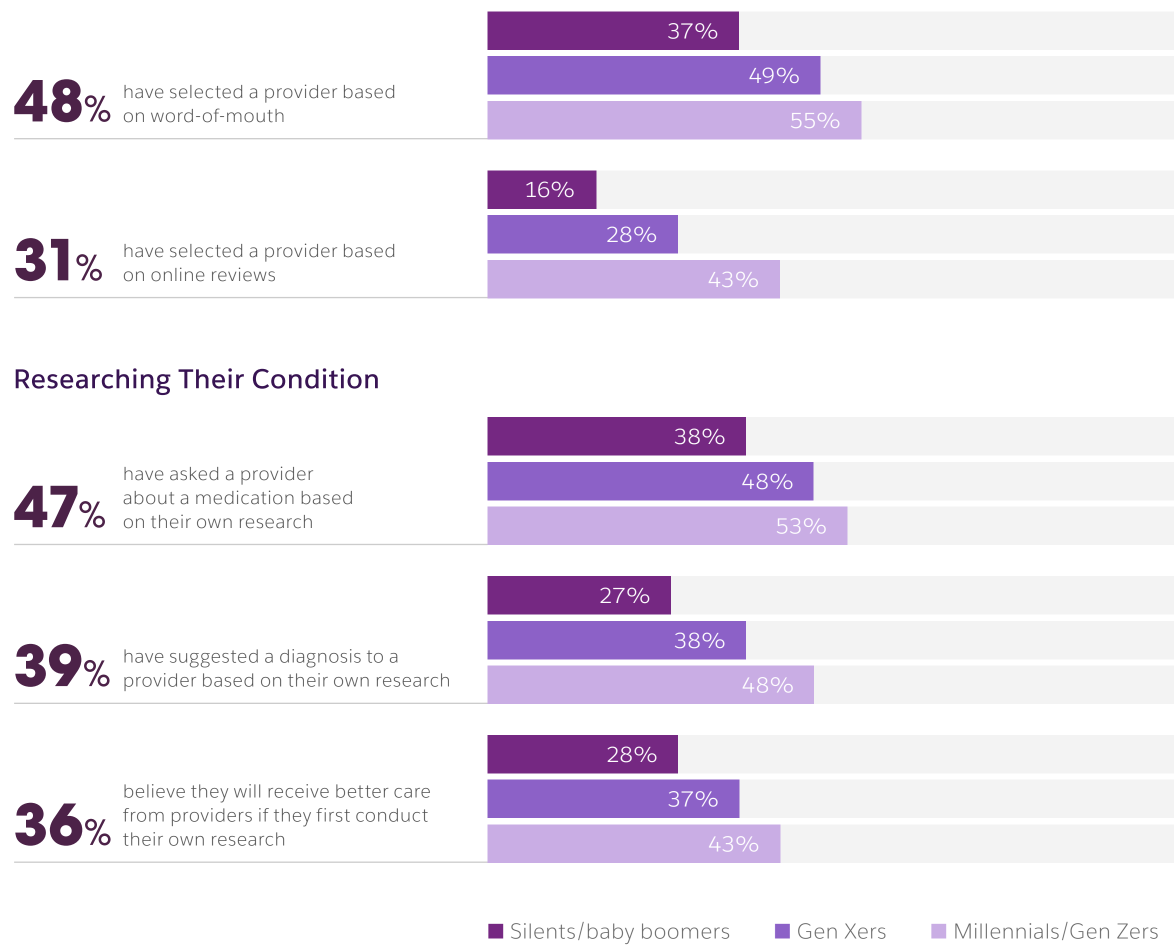
Across the board, younger generations take a particularly active role in researching their own care. Notably, **over half of millennials and Gen Z consumers have asked a provider about a medication based on their own research.** These digital natives may be taking cues from other aspects of life they're accustomed to, such as search engines and social networks that democratize knowledge.

As the barrier to knowledge lowers, finding alternative sources of care becomes easier, upping the ante for providers to improve the consumer experience.

82% of consumers would switch providers as a result of a bad experience.

Patients Drive Their Care Through Research

Finding a Provider



Data on this page is based on individuals who have seen a provider for their own health in the past five years.

01
Healthcare Contends with Evolving Consumer Expectations

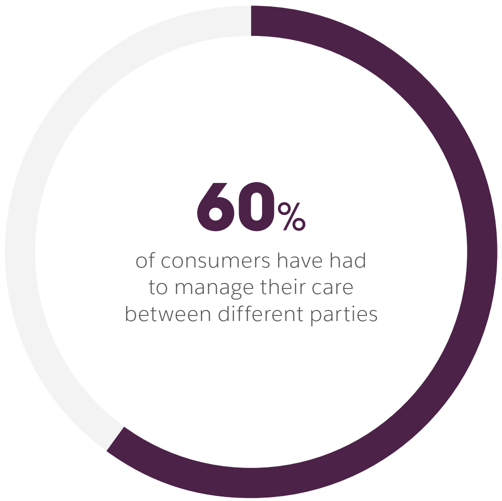
Consumers are often responsible for coordinating their own care and for sharing information between parties in the healthcare and life sciences industries. For instance, patients may need to inform providers about the medications they're taking or work with medical device suppliers on home modifications recommended by a clinician.

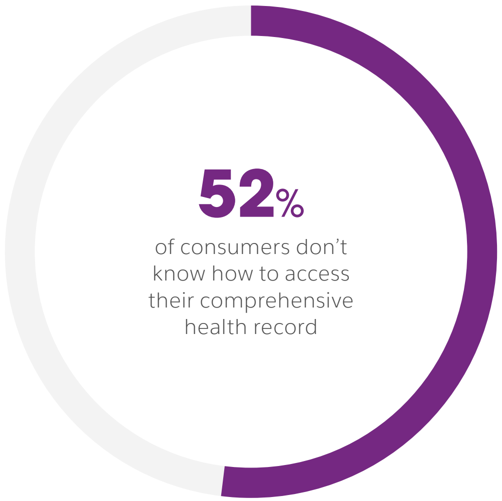
The fragmented landscape makes it challenging for consumers to get a holistic view of their health information across the full continuum of care. For example, **more than half of consumers are unsure how to access a comprehensive record of their health.**

This reality stands in direct conflict with the modern consumer's expectations for seamless, connected experiences in which their preferences are known across touchpoints and they can quickly access required information.

65% of consumers expect connected experiences.*

Fragmentation Forces Consumers to Connect the Dots





* *"State of the Connected Customer," Salesforce Research, June 2019.*

Spotlight
Healthcare and Life Sciences' Communication Problem

Today's consumer is accustomed to highly personalized engagement. A retailer may send real-time updates about a package in transit, for instance, or offer a discount for a recommended item. By and large, however, the healthcare and life sciences industries fail to deliver tailored communication. No more than half of healthcare consumers say the communications they receive feel relevant – with pharmaceutical and medical device companies especially missing the mark.

Moreover, the information consumers receive during the course of their care is often filled with complex, confusing terminology or uncertain next steps. The clearest and most relevant communications come from providers, yet even here, only one-fifth of consumers completely understand them. Pharmaceutical and medical device companies provide information that's the least understood.

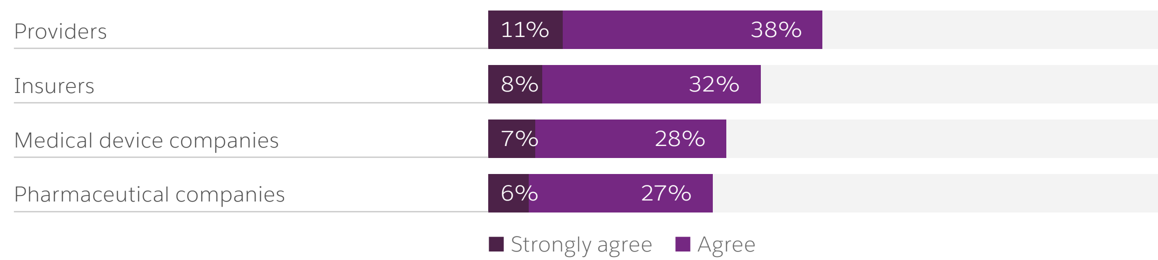
40% of consumers say communications from the healthcare and life sciences industries feel relevant.*

** Calculation: Percentage who agree, averaged across sectors.*

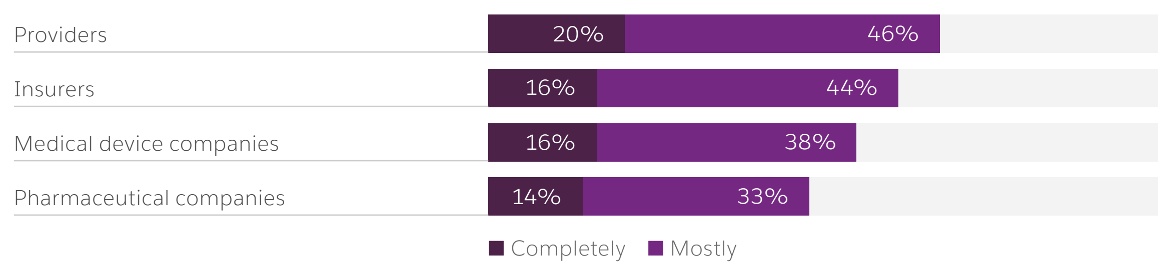
Communications Need Relevance and Clarity

Consumers Who Say the Following

Communications from the following feel relevant to me



I understand communications from the following



Data on this page is based on: for providers, individuals who have seen a provider for their own health; or those the corresponding party has initiated communication with in the past five years.

Base for insurers/pharmaceutical companies/medical device companies: Party has initiated communication with the consumer in the past five years.

02

Definition of a Great Experience Varies by Sector

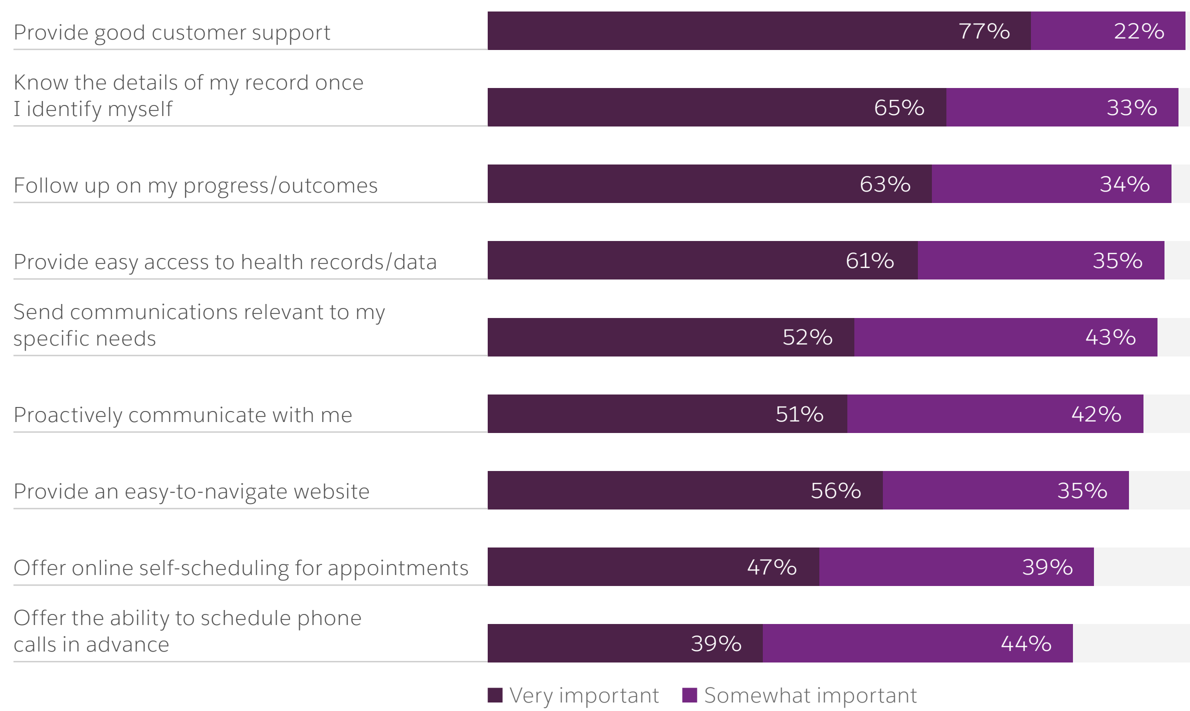
Providers are the heart of the care continuum. Primary care physicians, specialists, and their care teams forge close relationships with patients that can endure throughout the years. So it's not a big surprise that today's consumers want providers to engage them with close, attentive care. Case in point: Consumers rank good customer support and knowledge of their record upon contact – such as the details of an upcoming procedure – as the most important gestures a provider can make.

Consumers not only expect engagement from providers to be tailored – they also expect it both proactively and reactively. **Over half of consumers consider it very important for providers to proactively communicate,** such as by calling them before a procedure, and nearly two-thirds want providers to follow up on their progress or outcomes.

Personalization and support aren't the only critical factors for the patient-provider relationship. Self-sufficiency is, too. Easy-to-access health records are very important for more than six in 10 consumers. Significant numbers also expect self-scheduling of appointments or calls.

Consumers Value a Personal Touch from Providers

Consumers Who Say It's Important for Providers to Do the Following



Base: Have seen a provider for their own health in the past five years.

See page 34 for a full list of factors.

02
Definition of a Great Experience Varies by Sector

Regardless of whether they're covered by a public or private health insurance plan, members are holding insurers to the elevated standards of other industries. In markets where private insurance is an option, meeting these expectations is critical for increasing enrollment and retention.

For insurers seeking competitive differentiation, personalized service is king. Easy-to-understand benefits and detailed cost or copayment information are most important. Just as with their providers, consumers find easy access to health records critical, and in the U.S., **nearly two-thirds consider it vital for insurers to reduce the complexity of out-of-network claims.**

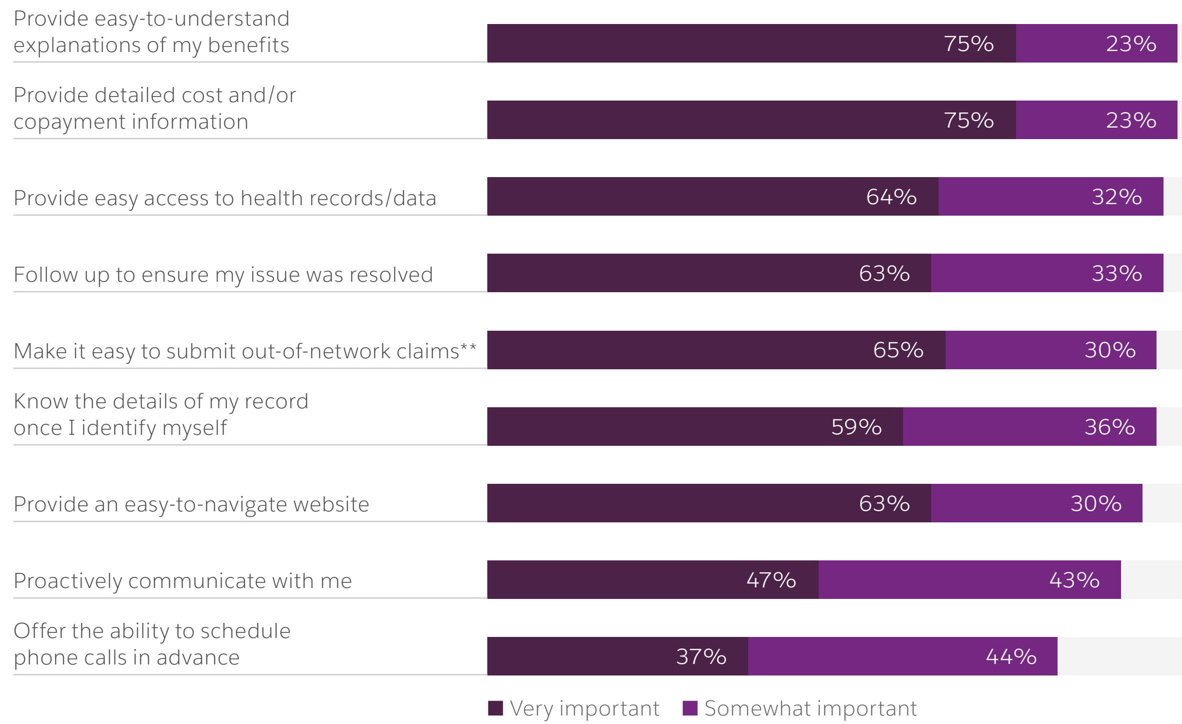
Today's consumers are likely to expect the same seamless, personalized communication from their insurers as they do from their providers. Consumers now evaluate insurers on quick access to their records upon making contact as well as by the quality of their follow-ups. Yet while improved communications become standard in consumers' minds, insurers are largely missing the mark.

59% of consumers have had to repeat information during a single insurance transaction.*

* Base: Have initiated communication with an insurer in the past five years.

Consumers Want Clarity from Insurers

Consumers Who Say It's Important for Insurers to Do the Following



*** Base: Consumers who live in the United States.*

Base: Had health insurance of any kind in the past five years.

See page 35 for a full list of factors.

02

Definition of a Great Experience Varies by Sector

Today, companies that were built on B2B business models are increasingly engaging consumers directly. In fact, nearly half (49%) of consumers regularly buy at least one product directly from a brand* – a phenomenon known as direct-to-consumer (D2C).

A significant number of consumers now have direct relationships with pharmaceutical companies.

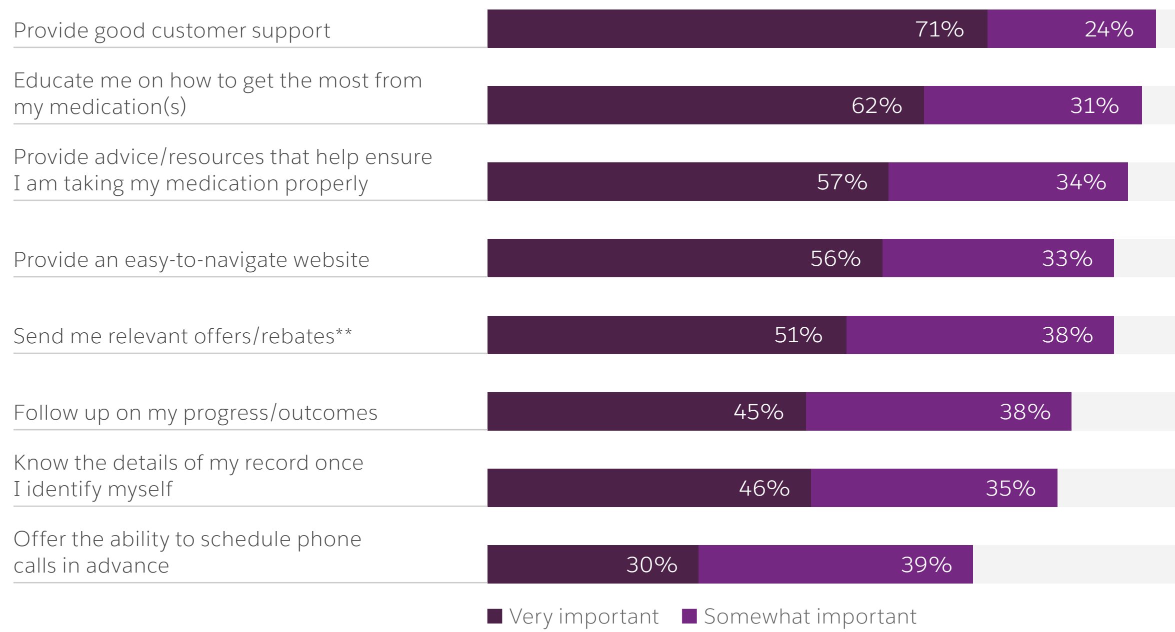
30% of consumers have communicated directly with a pharmaceutical company.

This new frontier of consumer engagement requires pharmaceutical companies to consider factors that were less impactful in the past. For instance, the needs of consumers – in addition to businesses – are now factored into customer support strategies. Pharmaceutical companies are also in a position to play an educational role by helping end consumers get the most from their medications or ensure correct administration or dosage.

Over half (51%) of U.S. consumers consider relevant offers or rebates from pharmaceutical companies to be very important, suggesting there may be an opportunity in some markets to take cues from the modern retail playbook.

Pharmaceutical Companies Are Forging Direct Relationships with Consumers

Consumers Who Say It's Important for Pharmaceutical Companies to Do the Following



Base: Have been prescribed a medication by a provider within the past five years.

*** Base: Consumers who live in the United States.*

See page 36 for a full list of factors.

* *"State of the Connected Customer," Salesforce Research, June 2019.*

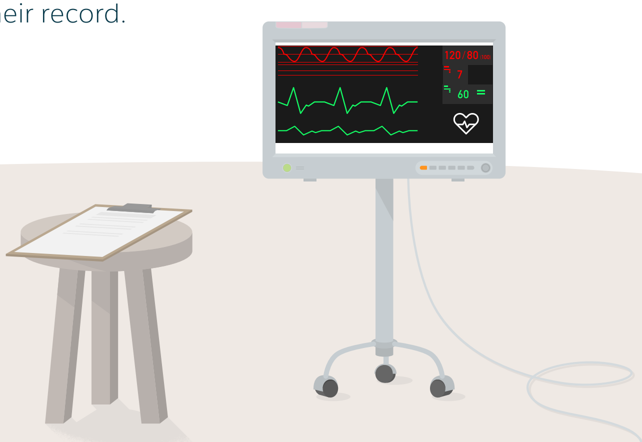
02

Definition of a Great Experience Varies by Sector

As with pharmaceutical companies, D2C opportunities are emerging for medical device companies. Proactive consumers are researching their conditions and reading customer reviews across the web, and **21% have initiated communication with medical device companies.** This opens new sales channels for the medical device sector and expands its purview beyond product innovation and production to being valued service providers.

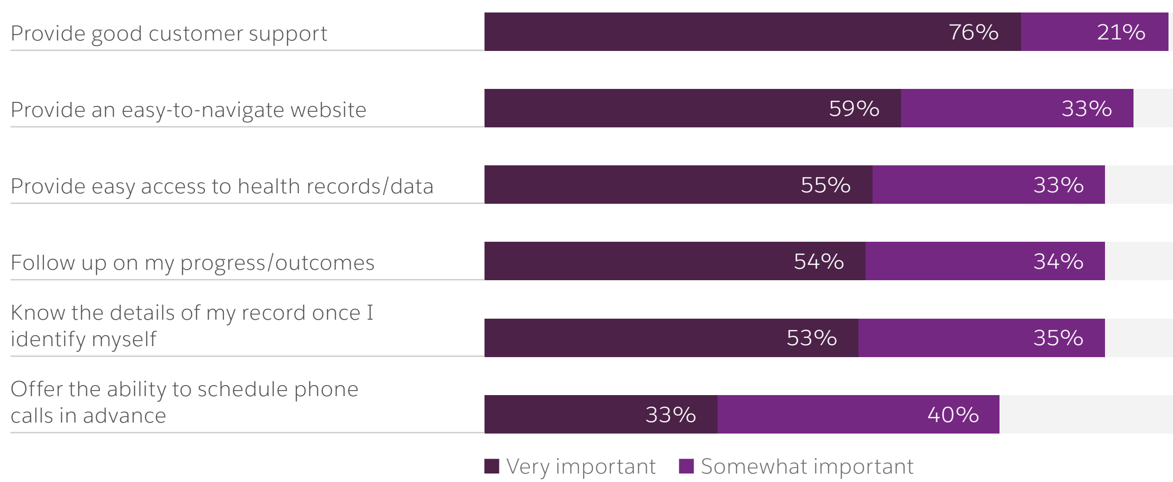
There are many categories of devices and diagnostics that consumers need help with, from drug-delivery devices to prenatal genetic tests, and three-fourths of medical device users stress good customer support as very important.

Medical device users want to be able to easily find their own answers on companies' websites. However, they also appreciate being treated as individuals through attentive personal care, such as when companies follow up on their progress and have a thorough understanding of their record.



Consumers Value Medical Device Companies As Service Providers

Consumers Who Say It's Important for Medical Device Companies to Do the Following



Base: Have used a medical device in the past five years.

See page 37 for a full list of factors.

Spotlight
Social Determinants of Health

Many aspects of wellness extend beyond the specific symptoms a patient is seeking to address – such as living conditions, socioeconomic status, and environmental factors. Called social determinants of health (SDoH), these factors are estimated to account for 80%–90% of patient outcomes.*

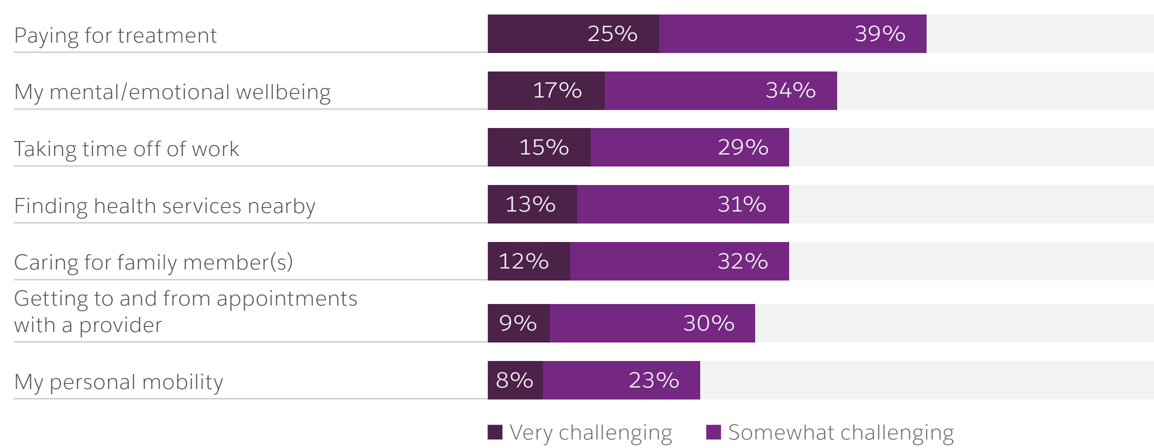
Affordability, work schedules, family life, faraway facilities, and personal mobility present challenges for a substantial portion of the population. The more the healthcare industry understands about patients, the better equipped it is to proactively treat the full person, rather than just their symptoms, to optimize outcomes. Eight in 10 consumers say it's at least somewhat important that their providers are aware of their personal lives beyond their health record, such as financial and transportation needs, their family situation, and more.

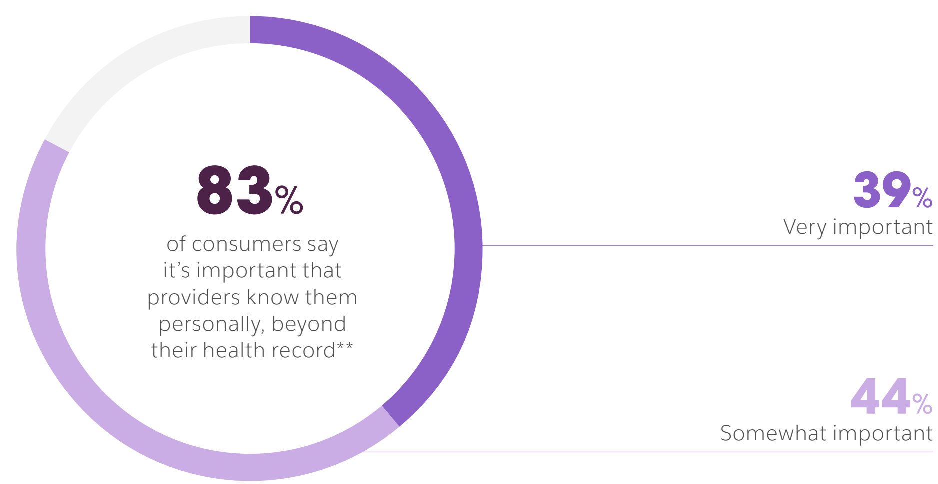
42% of consumers say life circumstances have caused them to miss an appointment with a provider.

Social Determinants of Health 101 for Health Care: Five Plus Five," National Academy of Medicine, 2017.

A Patient Is More Than Their Symptoms

Consumers Who Say the Following Challenges Them in Getting Care





*** Base: Have seen a provider for their own health in the past five years.*

03
Healthcare Consumer Engagement Goes Digital

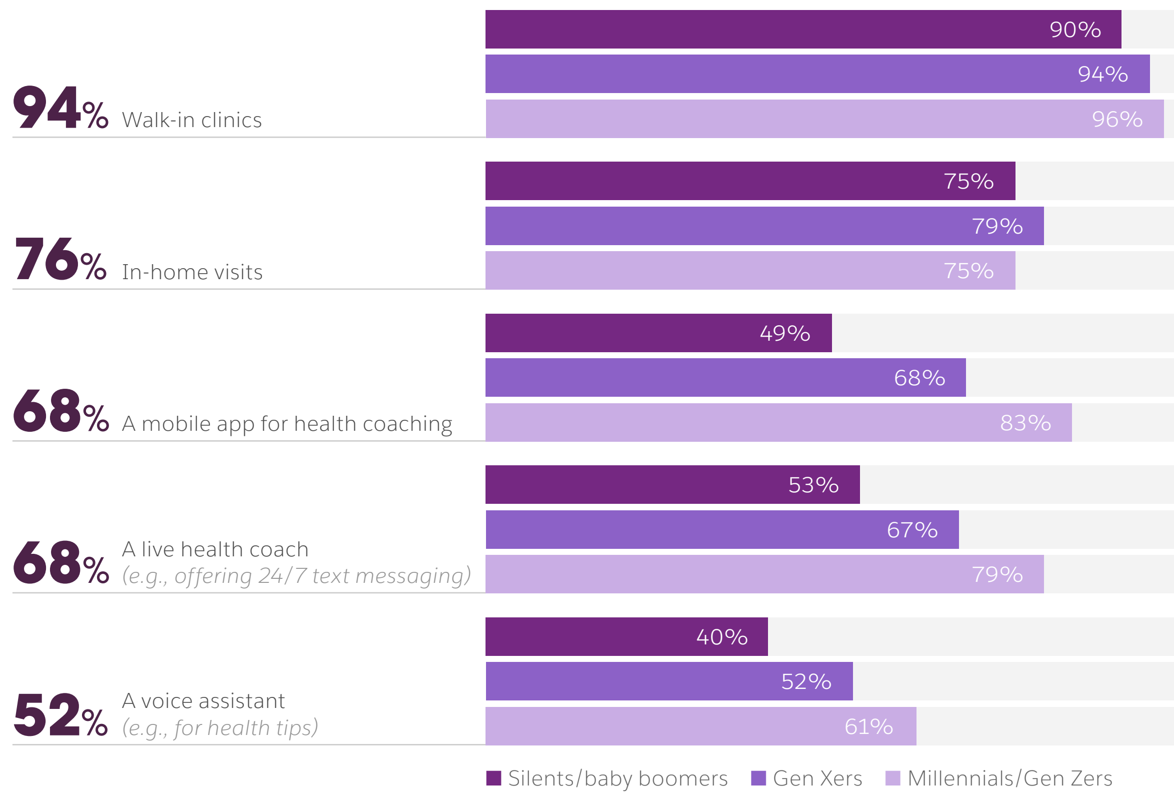
Consumers are eager for healthcare innovations that reduce barriers to care. With busy work schedules and home lives, taking time for wellness can be challenging. Accordingly, a hefty 94% are interested in walk-in clinics that accept patients with no appointment required, and 76% are interested in in-home visits.

Hungry for information and convenience, some consumers have leaped on recent gamification trends, taking health-tracking into their own hands. Digital methods for making care more accessible are particularly popular with younger generations.

More than four out of five millennials and Gen Zers are interested in a mobile app for health coaching, and nearly eight in 10 feel similarly about interacting with a live health coach. With 37% of millennials and Gen Z consumers saying they'd rather talk to their device than type in it,* it's perhaps not surprising that 61% of these younger generations are interested in the health applications of voice assistants.

Emerging Trends Boost Care Accessibility

Consumers Interested in the Following



* *State of the Connected Customer survey, Salesforce Research, April 2019. Data may or may not be represented in the "State of the Connected Customer" report.*

03
Healthcare Consumer Engagement Goes Digital

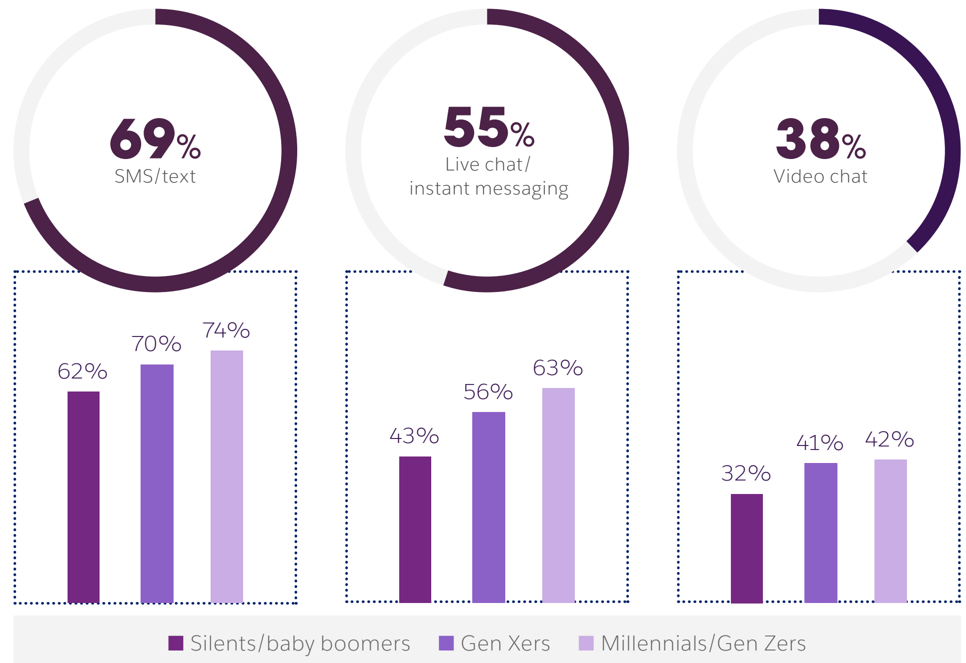
Sixty-eight percent of consumers expect companies to engage with them in real time,* and when it comes to healthcare, they make no exception.

While email, phone, and in-person remain the hallmark channels of engagement in the healthcare and life sciences industries, they are being joined by a number of emerging digital channels that provide instant responses (instant messaging and video chat) or are easy to use on the fly (text/SMS).

Younger consumers tend to value these emerging digital channels more than their older counterparts do, suggesting a direction in which healthcare and life sciences communication may evolve. For instance, millennial and Gen Z consumers are at least 10 percentage points more likely than silents and baby boomers to value instant messaging and video chat for corresponding with the healthcare and life sciences industries. Already, startups like One Medical and JustAnswer are competing on these features.

Consumers Demand Real-Time Communication

Consumers Who Say It's Important to Offer the Following



Calculation: Percentage who say it's important, averaged across sectors. Sector breakout *on pages 34–37.*

Base: Have seen a provider for their own health, had health insurance of any kind, have been prescribed a medication by a provider, or have used a medical device in the past five years.

* *"State of the Connected Customer," Salesforce Research, June 2019.*

03

Healthcare Consumer Engagement Goes Digital

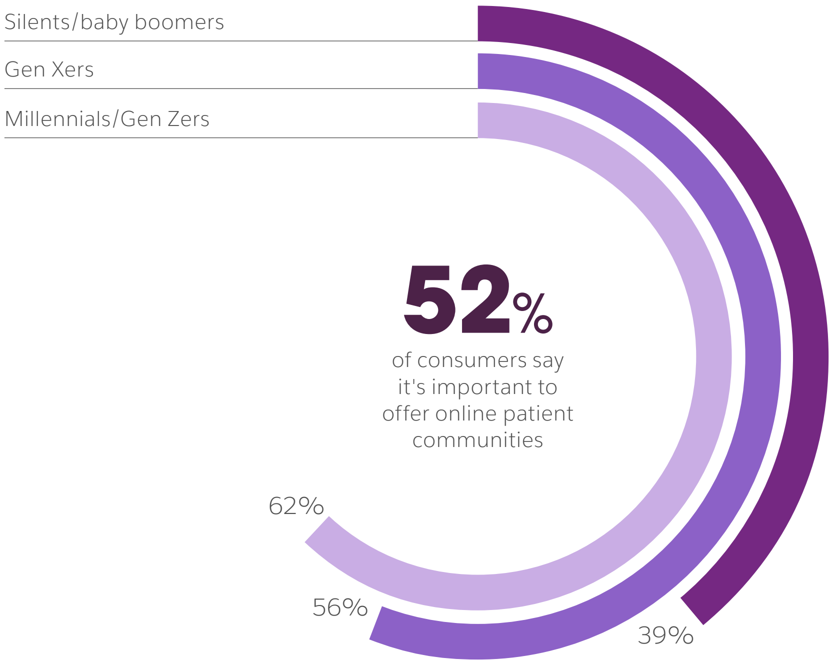
As the world shifts toward democratized knowledge, each individual's experience can add value to the conversation. With many healthcare consumers now conducting their own research, online communities provide a place to get feedback from peers, share tips, and learn about available resources.

There are benefits for businesses as well: Consumers answering each other's general questions free support staff to respond to inquiries that are more sensitive or complex. Currently, **43% of healthcare and life sciences organizations use communities to provide support.***

As with other emerging digital communication channels, younger consumers – who've grown up using web forums and social media – are more likely to stress the importance of implementing communities.

Healthcare and life sciences marketers cite online communities as the top channel for customer retention and customer advocacy,** shining a light on a potential opportunity for organizations looking to deepen consumer relationships.

Patient Communities Provide Crowdsourced Answers



Calculation: Percentage who say it's important, averaged across sectors. Sector breakout *on pages 34–37.*

Base: Have seen a provider for their own health, have been prescribed a medication by a provider, or have used a medical device in the past five years.

* *State of Service survey, Salesforce Research, December 2018. Data may or may not be represented in the "State of Service" report.*

** *"Trends in Healthcare and Life Sciences Marketing," Salesforce Research, September 2018. Data may or may not be represented in the report.*

03

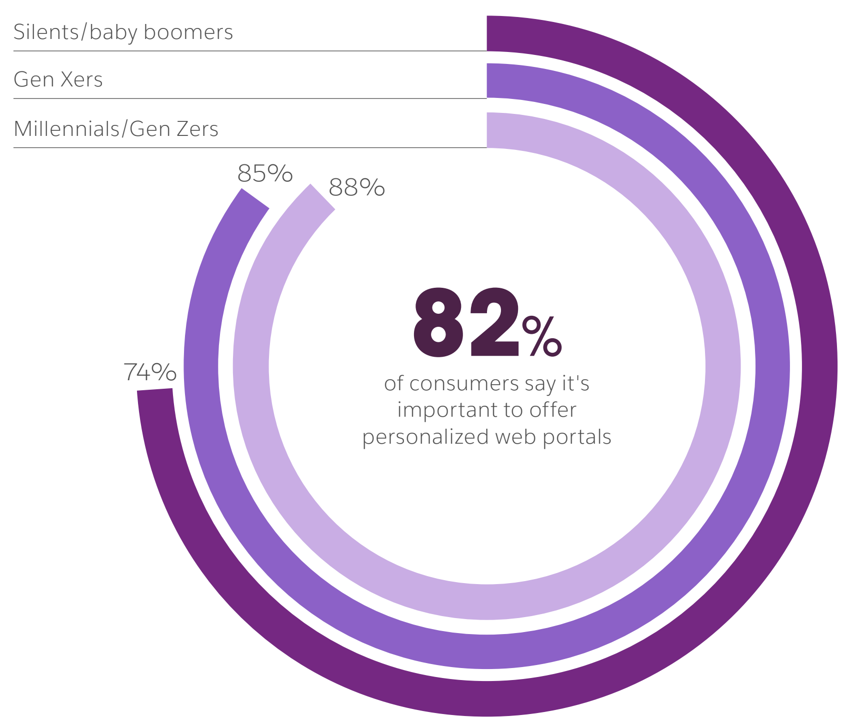
Healthcare Consumer Engagement Goes Digital

Web portals are very popular in healthcare and life sciences. **Twenty percent of patients use them to communicate with providers,* making portals the fourth most-common patient-provider communication channel, after phone, in-person, and email.** An equal percentage of consumers use portals to communicate with insurers.**

Portals provide a hub for common healthcare transactions. For instance, an insurer's portal might allow a consumer to submit claims and view plan benefits, while a provider's might help them request prescription refills and book appointments.

Thanks to the rapid evolution of technology, **52% of consumers now expect to find whatever they need from a company in three clicks or less.***** It's perhaps unsurprising that centralizing frequent transactions and relevant information is popular; four in five consumers say it's important for personalized portals to be offered. Again, this technology is especially popular with younger consumers, 88% of whom say it's important to offer it.

Consumers Demand Personalized Portals



Calculation: Percentage who say it's important, averaged across sectors. Sector breakout *on pages 34–37.*

Base: Have seen a provider for their own health, had health insurance of any kind, or have used a medical device in the past five years.

* *Base: Have seen a provider for their own health in the past five years.*

** *Base: Have initiated communication with an insurer or an insurer has initiated communication with them in the past five years.*

*** *"State of the Connected Customer," Salesforce Research, June 2019.*

Spotlight
An Advisory Opportunity for Insurers

The mechanisms of insurance can seem opaque to healthcare consumers. For instance, 58% of members have felt unclear whether a medicine, practitioner, or procedure would be covered by their health insurance policy.

Only 31% of members have been communicated with proactively by their insurer, yet overwhelmingly, members want to receive communications that help them understand their costs, optimize available benefits, and look after their own health.

Whether they're a private entity or a public program, insurers that embrace the role of educator establish a relationship with their members that provides value beyond cost-savings alone, helping increase customer satisfaction and reduce turnover risk in regions with competitive markets.

67% of consumers would switch or supplement insurers after a bad experience.

Members Seek Value-Rich Communication

Consumers Who Want Insurers to Communicate About the Following

** Base: Consumers who live in the United States.*

Data on this page is based on individuals who had health insurance of any kind in the past five years.

04

Trust Takes Priority as Health Tech Matures

Trust is critical in a landscape where data is currency, opaque privacy policies proliferate, and cybersecurity threats loom. In fact, **88% of consumers are more loyal to companies they trust.*** In the healthcare and life sciences industries, where intimate personal data is involved in so many transactions, trust is fundamental to fostering positive patient and business outcomes.

Consumer confidence is highest for providers. Eight in 10 consumers say they trust them, while just under half trust the pharmaceutical sector. Nevertheless, different sectors of the healthcare and life sciences industries have key mechanisms for building trust at their disposal.

Patient follow-up is the top way for providers to strengthen confidence. Meanwhile, insurers, pharmaceutical companies, and medical device companies can build trust by providing greater clarity in their communications – such as by simplifying language and making sure their content avoids industry jargon.

Clear Communication Deepens Trust

Consumers Who Trust the Following

Providers	Medical Device Companies	Insurers	Pharmaceutical Companies
81%	72%	59%	49%

Methods for Building Consumer Trust**

	Providers	Medical Device Companies	Insurers	Pharmaceutical Companies
1	Follow-up on my progress/ outcomes	Easy-to-understand communications	Easy-to-understand explanations of my benefits	Easy-to-understand communications
2	Easy-to-understand communications	Communications relevant to my specific needs	Follow-up to ensure my issue was resolved	Communications relevant to my specific needs
3	Communications relevant to my specific needs	Follow-up on my progress/ outcomes	Communications relevant to my specific needs	Follow-up on my progress/ outcomes

*** Base: Have seen a provider for their own health, have used a medical device, had health insurance of any kind, or have been prescribed a medication by a provider in the past five years, respectively.*

* *"State of the Connected Customer," Salesforce Research, June 2019.*

04

Trust Takes Priority as Health Tech Matures

In the healthcare and life sciences sector, innovation and personalized care at scale both run on data. A majority of consumers are at least somewhat open to the prospect of sharing their information to improve outcomes for themselves and others. For instance, only 15% of consumers would not share their feedback with pharmaceutical companies to develop or support new medications.

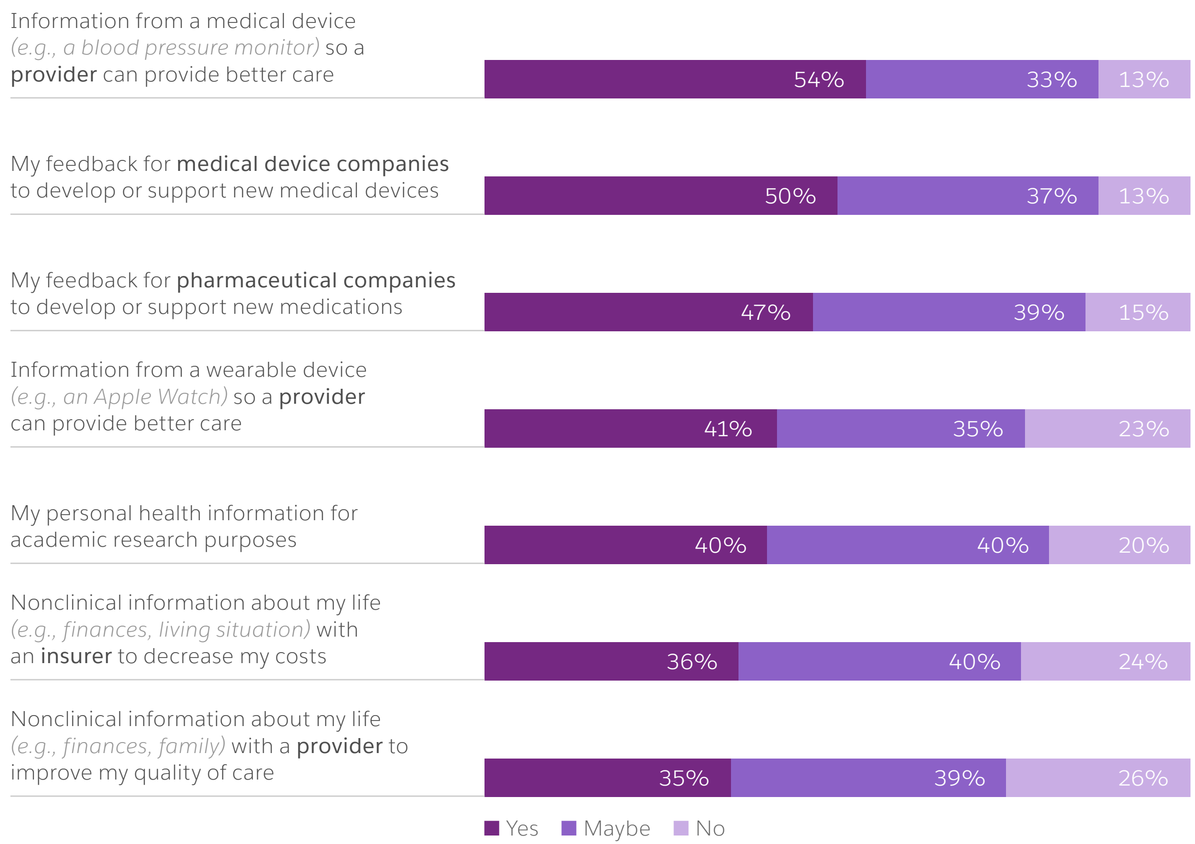
There is, however, some hesitation. While very few consumers are completely closed to the possibility, many would only "maybe" feel comfortable sharing data, nodding to a crisis of trust.

At first look, these concerns may seem at odds with a desire for proactive, personalized care. However, clarity of intentions goes a long way. **Eighty-nine percent of consumers are more likely to trust businesses with their data when they are transparent about how information is used,*** confirming that honesty is the best policy.

51% of consumers are concerned about the future of privacy in healthcare as technology evolves.

Consumer Trust Is Integral for Obtaining Key Data

Consumers Who Would Share the Following, Assuming It Was Securely and Transparently Used



* *"Trends in Customer Trust," Salesforce Research, April 2018. Data may or may not be represented in the report.*

Last Look:
The Rise of AI Hints at the Future of Healthcare

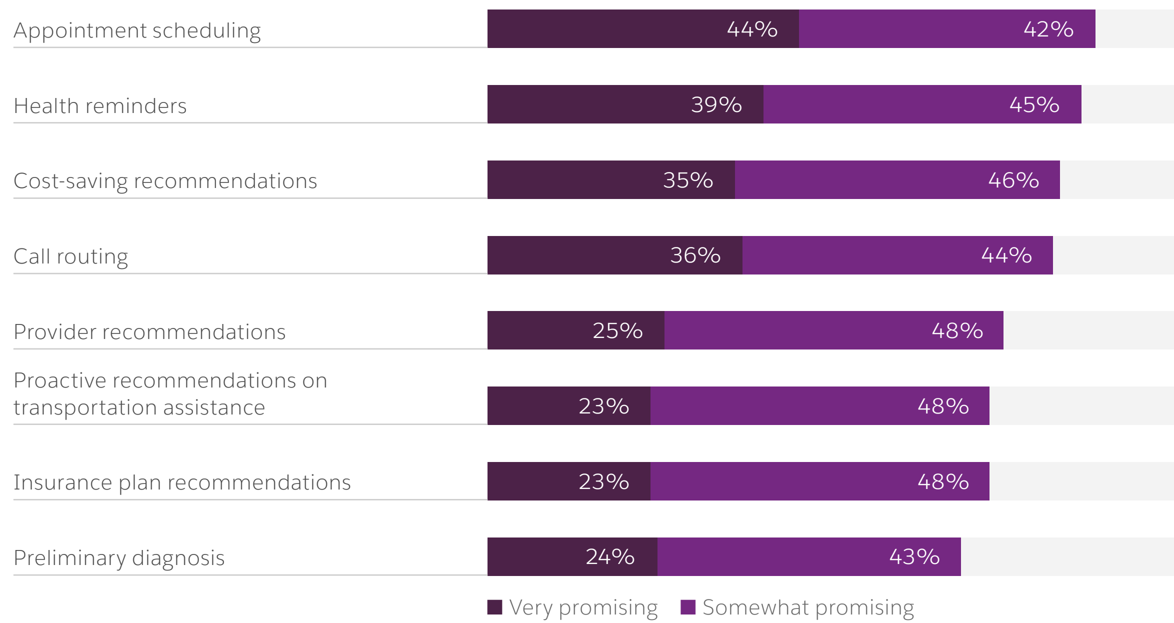
While 71% of consumers say providers understand their health goals, only 44% say they receive proactive care.* There's no shortage of data in healthcare, but there is clearly room for improvement in how it is leveraged.

Consumers recognize that AI represents enticing prospects for the healthcare and life sciences industries, which have struggled with delivering individualized care to large populations while keeping costs down and response times prompt.

In particular, consumers see potential for AI to increase efficiency and deliver personalized recommendations. For instance, 84% believe AI is at least somewhat promising for sending health-related reminders, such as care plan tasks and health goals.

Consumers See Potential in AI for Healthcare

Consumers Who Find AI Promising for the Following



Base: Have seen a provider for their own health in the past five years.

Country Profiles*

* Please consider that cultural bias impacts survey results across countries.

Country Profile

Australia (489 survey respondents)

38% of consumers say healthcare and life sciences are more focused on industry needs than patient needs

51% of consumers don't know how to access their comprehensive health record

APPOINTMENT

40% of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY

39% of consumers say finding health services nearby is challenging

TAKING TIME OFF

39% of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	75%
Online patient communities	51%
Live chat/instant messaging	50%
Video chat	31%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37.
Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A mobile app for health coaching	62%
A live health coach *(e.g., offering 24/7 text messaging)*	60%
A voice assistant *(e.g., for health tips)*	45%

CONSUMERS WHO TRUST THE FOLLOWING

Providers	83%
Medical device companies	75%
Insurers	60%
Pharmaceutical companies	55%

CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	51%
My feedback for **pharmaceutical companies** to develop or support new medications	46%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	33%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	33%

Country Profile

Brazil (500 survey respondents)

47% of consumers say healthcare and life sciences are more focused on industry needs than patient needs

64% of consumers don't know how to access their comprehensive health record

APPOINTMENT

62% of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY

76% of consumers say finding health services nearby is challenging

TAKING TIME OFF

76% of consumers say taking time off of work to get care is challenging

CONSUMERS WHO TRUST THE FOLLOWING

Providers	80%
Medical device companies	78%
Pharmaceutical companies	69%
Insurers	62%

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	96%
Live chat/instant messaging	83%
Online patient communities	82%
Video chat	67%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37. Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	73%
My feedback for **pharmaceutical companies** to develop or support new medications	71%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	52%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	46%

CONSUMERS INTERESTED IN THE FOLLOWING

A mobile app for health coaching	95%
A live health coach *(e.g., offering 24/7 text messaging)*	94%
A voice assistant *(e.g., for health tips)*	81%

Country Profile

France (501 survey respondents)

35% of consumers say healthcare and life sciences are more focused on industry needs than patient needs

57% of consumers don't know how to access their comprehensive health record

APPOINTMENT
34% of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY
52% of consumers say finding health services nearby is challenging

TAKING TIME OFF
47% of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	81%
Live chat/instant messaging	53%
Online patient communities	43%
Video chat	35%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37. Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A mobile app for health coaching	58%
A live health coach *(e.g., offering 24/7 text messaging)*	55%
A voice assistant *(e.g., for health tips)*	47%

CONSUMERS WHO TRUST THE FOLLOWING

Providers	85%
Medical device companies	75%
Insurers	63%
Pharmaceutical companies	47%

CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	49%
My feedback for **pharmaceutical companies** to develop or support new medications	44%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	36%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	32%

Country Profile

Germany (502 survey respondents)

50%
of consumers say healthcare and life sciences are more focused on industry needs than patient needs

61%
of consumers don't know how to access their comprehensive health record

APPOINTMENT

44%
of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY

36%
of consumers say finding health services nearby is challenging

TAKING TIME OFF

33%
of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	76%
Online patient communities	45%
Live chat/instant messaging	32%
Video chat	28%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37. Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A mobile app for health coaching	55%
A live health coach *(e.g., offering 24/7 text messaging)*	52%
A voice assistant *(e.g., for health tips)*	37%

CONSUMERS WHO TRUST THE FOLLOWING

Insurers	80%
Medical device companies	76%
Providers	75%
Pharmaceutical companies	54%

CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	40%
My feedback for **pharmaceutical companies** to develop or support new medications	37%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	28%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	26%

Country Profile

Italy (500 survey respondents)

36%
of consumers say healthcare and life sciences are more focused on industry needs than patient needs

52%
of consumers don't know how to access their comprehensive health record

APPOINTMENT
38%
of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY
46%
of consumers say finding health services nearby is challenging

TAKING TIME OFF
37%
of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	90%
Live chat/instant messaging	69%
Online patient communities	65%
Video chat	50%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37. Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A mobile app for health coaching	82%
A live health coach *(e.g., offering 24/7 text messaging)*	77%
A voice assistant *(e.g., for health tips)*	59%

CONSUMERS WHO TRUST THE FOLLOWING

Providers	85%
Medical device companies	81%
Insurers	63%
Pharmaceutical companies	57%

CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	57%
My feedback for **pharmaceutical companies** to develop or support new medications	52%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	39%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	34%

Country Profile

Japan (501 survey respondents)

49% of consumers say healthcare and life sciences are more focused on industry needs than patient needs

64% of consumers don't know how to access their comprehensive health record

APPOINTMENT
24% of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY
38% of consumers say finding health services nearby is challenging

TAKING TIME OFF
41% of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	72%
Online patient communities	47%
Live chat/instant messaging	39%
Video chat	33%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37. Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A live health coach *(e.g., offering 24/7 text messaging)*	64%
A mobile app for health coaching	61%
A voice assistant *(e.g., for health tips)*	58%

CONSUMERS WHO TRUST THE FOLLOWING

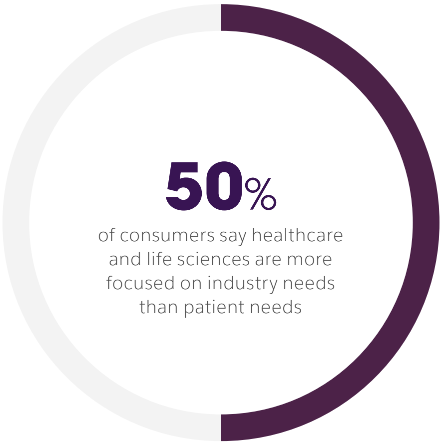
Providers	81%
Insurers	78%
Medical device companies	77%
Pharmaceutical companies	73%

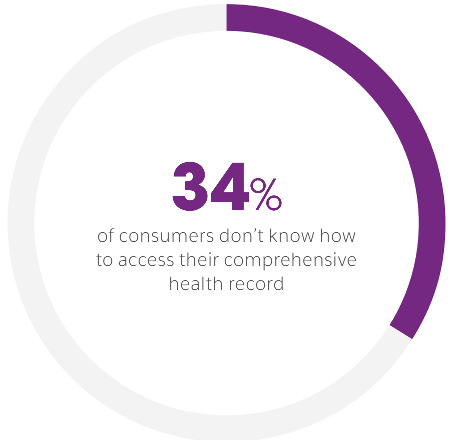
CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	28%
My feedback for **pharmaceutical companies** to develop or support new medications	26%
My feedback for **medical device companies** to develop or support new medical devices	25%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	22%

Country Profile

Netherlands (500 survey respondents)





APPOINTMENT

27% of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY

36% of consumers say finding health services nearby is challenging

TAKING TIME OFF

46% of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	84%
Live chat/instant messaging	57%
Online patient communities	53%
Video chat	35%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37. Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A mobile app for health coaching	69%
A live health coach *(e.g., offering 24/7 text messaging)*	61%
A voice assistant *(e.g., for health tips)*	39%

CONSUMERS WHO TRUST THE FOLLOWING

Providers	78%
Medical device companies	74%
Insurers	58%
Pharmaceutical companies	42%

CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	41%
My feedback for **pharmaceutical companies** to develop or support new medications	34%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	26%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	23%

Country Profile
United Kingdom (489 survey respondents)

35%
of consumers say healthcare and life sciences are more focused on industry needs than patient needs

60%
of consumers don't know how to access their comprehensive health record

APPOINTMENT
37%
of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY
41%
of consumers say finding health services nearby is challenging

TAKING TIME OFF
41%
of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	78%
Live chat/instant messaging	53%
Online patient communities	47%
Video chat	37%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37.
Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A live health coach *(e.g., offering 24/7 text messaging)*	66%
A mobile app for health coaching	65%
A voice assistant *(e.g., for health tips)*	45%

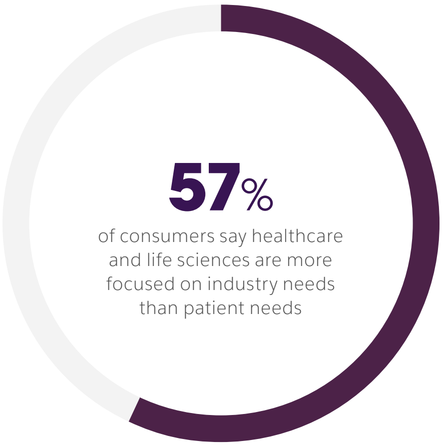
CONSUMERS WHO TRUST THE FOLLOWING

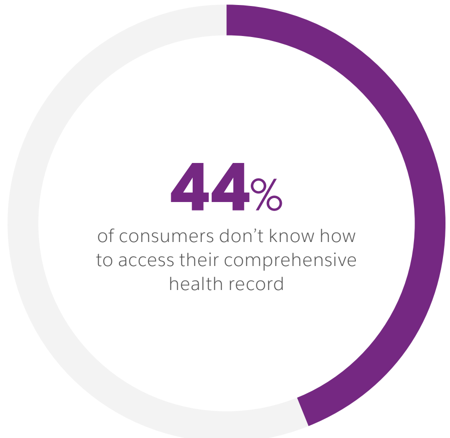
Providers	88%
Medical device companies	76%
Pharmaceutical companies	51%
Insurers	38%

CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	62%
My feedback for **pharmaceutical companies** to develop or support new medications	55%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	34%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	29%

Country Profile
United States (2,002 survey respondents)





APPOINTMENT
50%
of consumers say life circumstances have caused them to miss an appointment with a provider

SERVICES NEARBY
40%
of consumers say finding health services nearby is challenging

TAKING TIME OFF
44%
of consumers say taking time off of work to get care is challenging

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING

Personalized web portals	83%
Live chat/instant messaging	55%
Online patient communities	47%
Video chat	36%

Calculation: Percentage who say it's important, averaged across sectors. Sector breakout on pages 34–37. Base: Seen a provider for their own health, had health insurance of any kind, been prescribed a medication by a provider, or used a medical device in the past five years, where applicable.

CONSUMERS INTERESTED IN THE FOLLOWING

A live health coach *(e.g., offering 24/7 text messaging)*	70%
A mobile app for health coaching	68%
A voice assistant *(e.g., for health tips)*	53%

CONSUMERS WHO TRUST THE FOLLOWING

Providers	80%
Medical device companies	63%
Insurers	52%
Pharmaceutical companies	36%

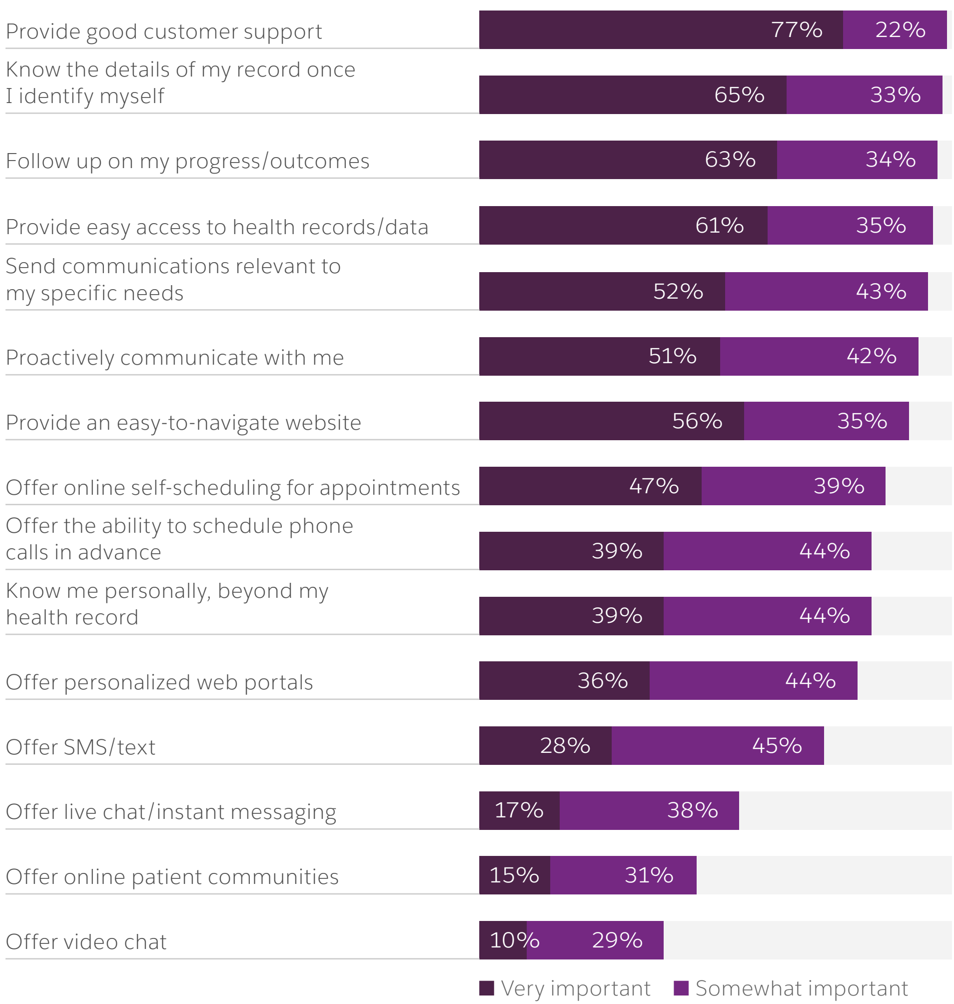
CONSUMERS WHO WOULD SHARE THE FOLLOWING, ASSUMING IT WAS SECURELY AND TRANSPARENTLY USED

My feedback for **medical device companies** to develop or support new medical devices	51%
My feedback for **pharmaceutical companies** to develop or support new medications	49%
Nonclinical information about my life *(e.g., finances, living situation)* with an **insurer** to decrease my costs	42%
Nonclinical information about my life *(e.g., finances, family)* with a **provider** to improve my quality of care	41%

Appendix

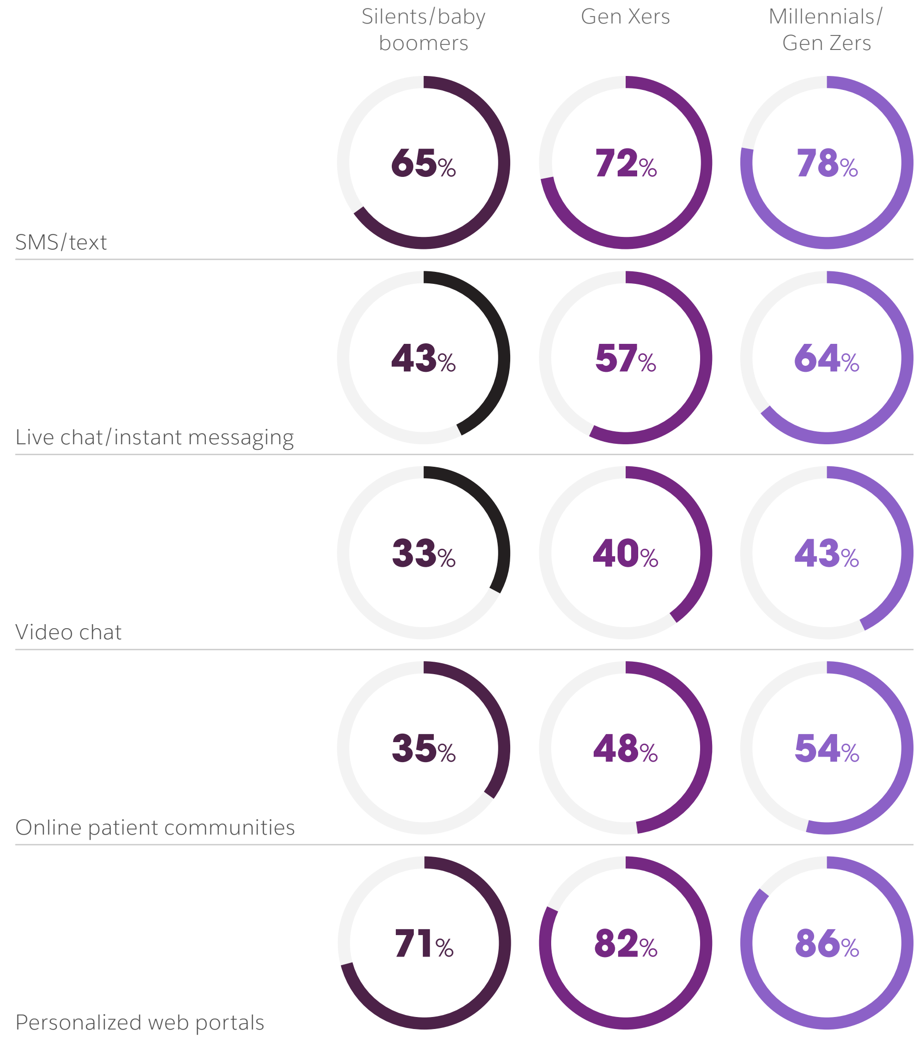
Appendix:
Providers

CONSUMERS WHO SAY IT'S IMPORTANT FOR PROVIDERS TO DO THE FOLLOWING



Base: Have seen a provider for their own health in the past five years.

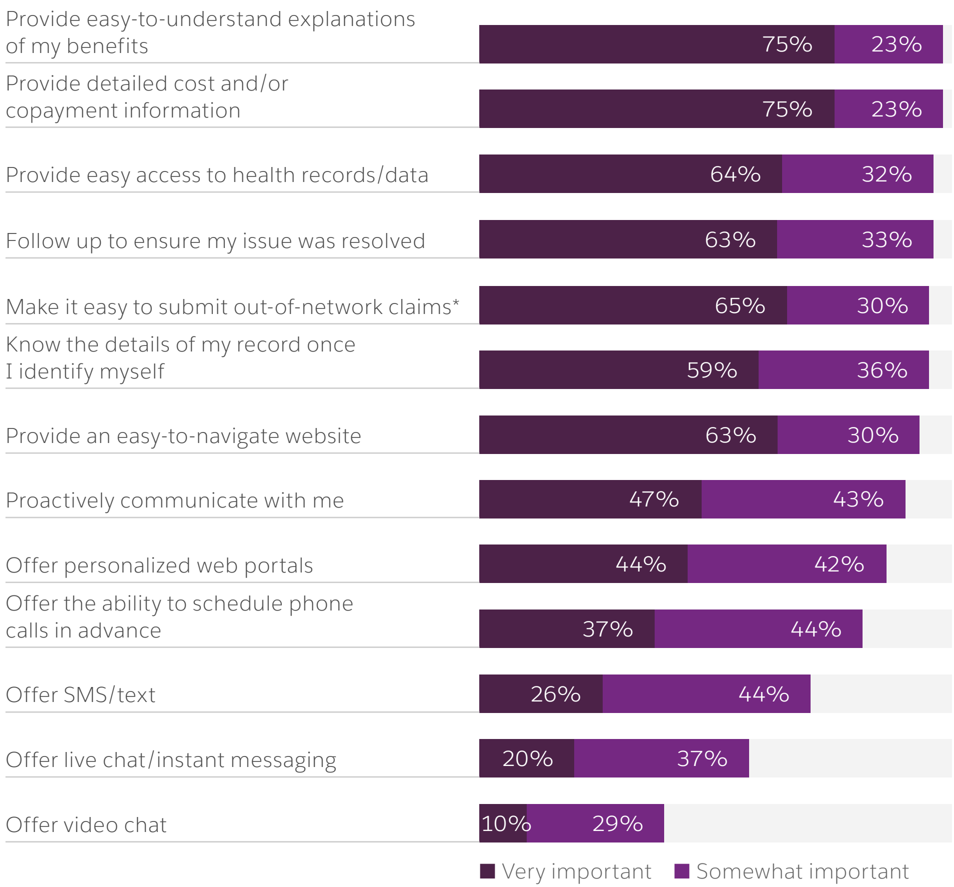
CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING, BY GENERATION



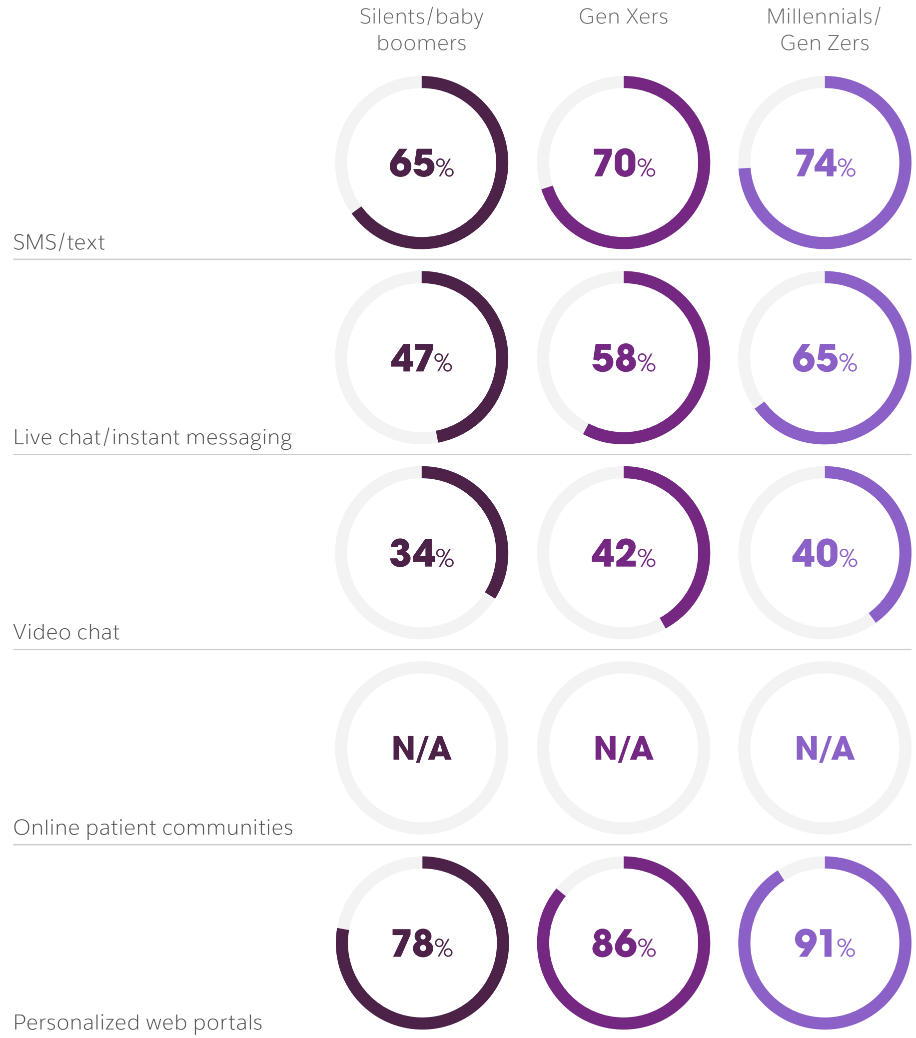
Base: Have seen a provider for their own health in the past five years.

Appendix:
Insurers

CONSUMERS WHO SAY IT'S IMPORTANT FOR INSURERS TO DO THE FOLLOWING



CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING, BY GENERATION



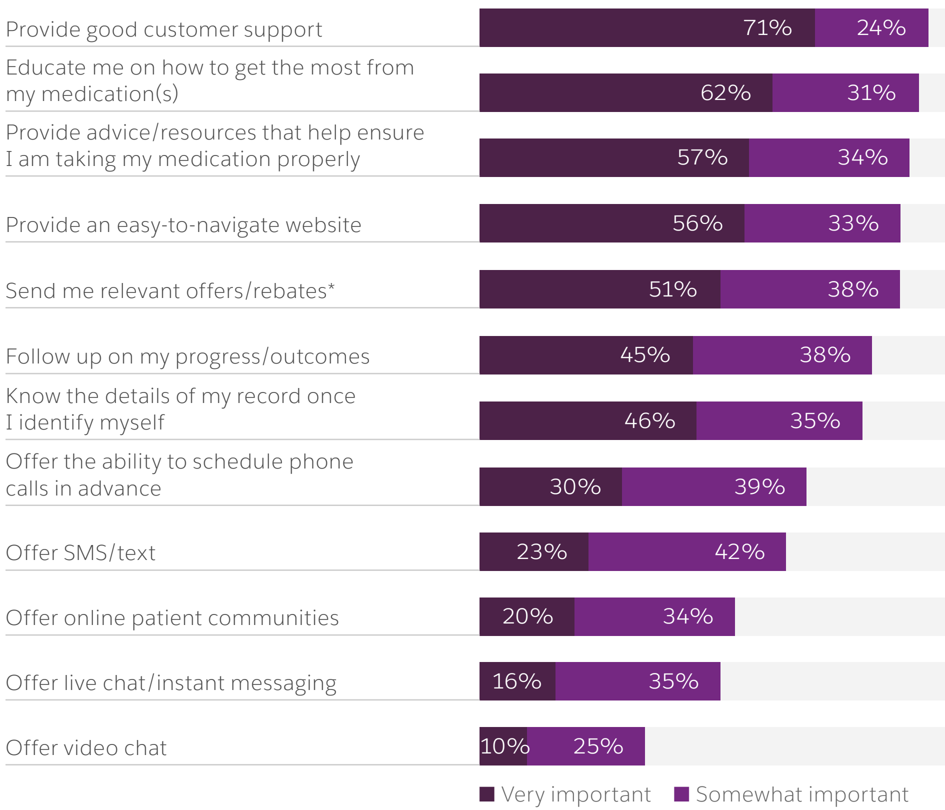
** Base: Consumers who live in the United States.*

Base: Had health insurance of any kind in the past five years.

Base: Had health insurance of any kind in the past five years.

Appendix:
Pharmaceutical Companies

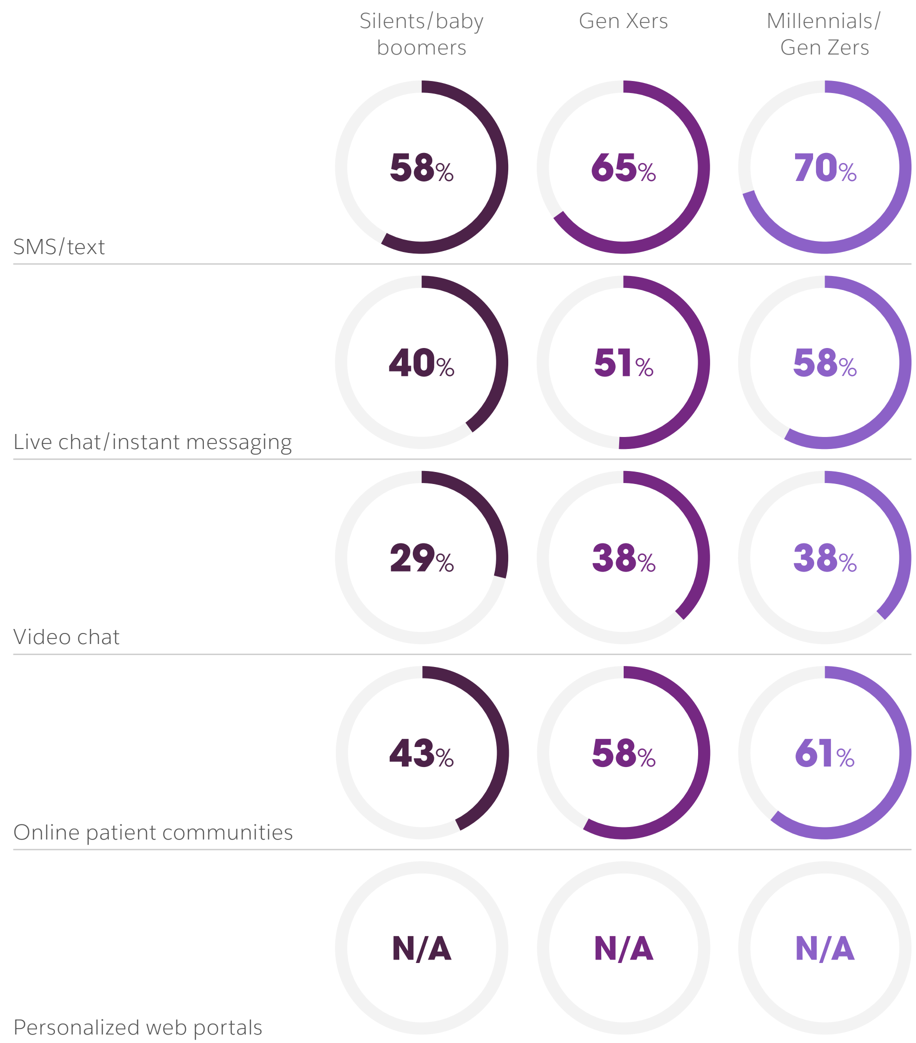
CONSUMERS WHO SAY IT'S IMPORTANT FOR PHARMACEUTICAL COMPANIES TO DO THE FOLLOWING



Base: Consumers who live in the United States.

Base: Have been prescribed a medication by a provider in the past five years.

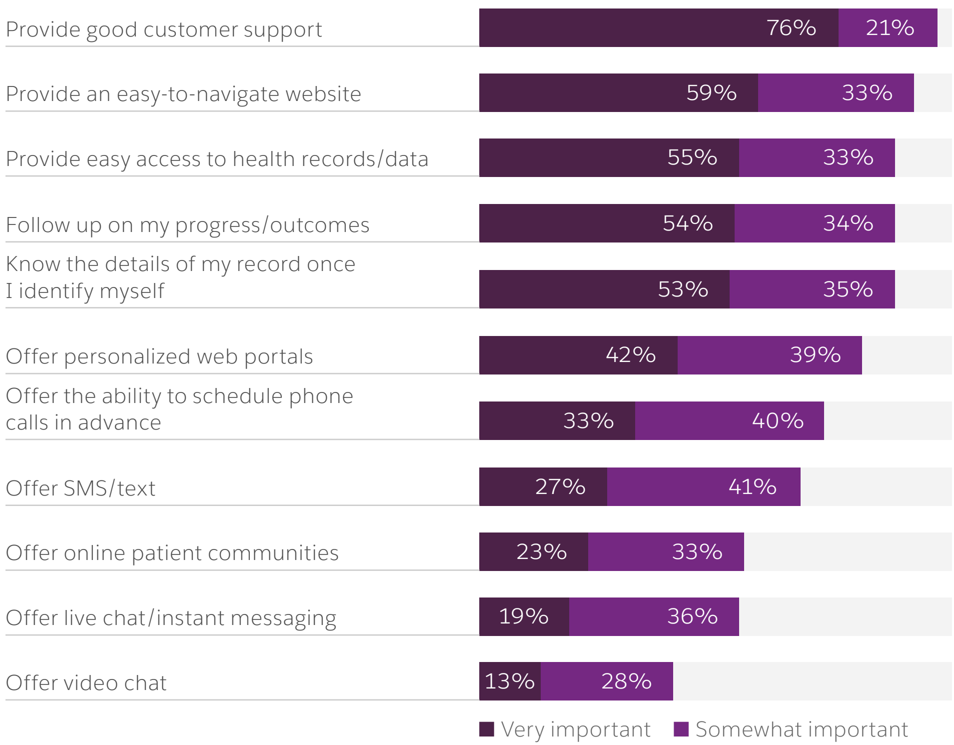
CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING, BY GENERATION



Base: Have been prescribed a medication by a provider in the past five years.

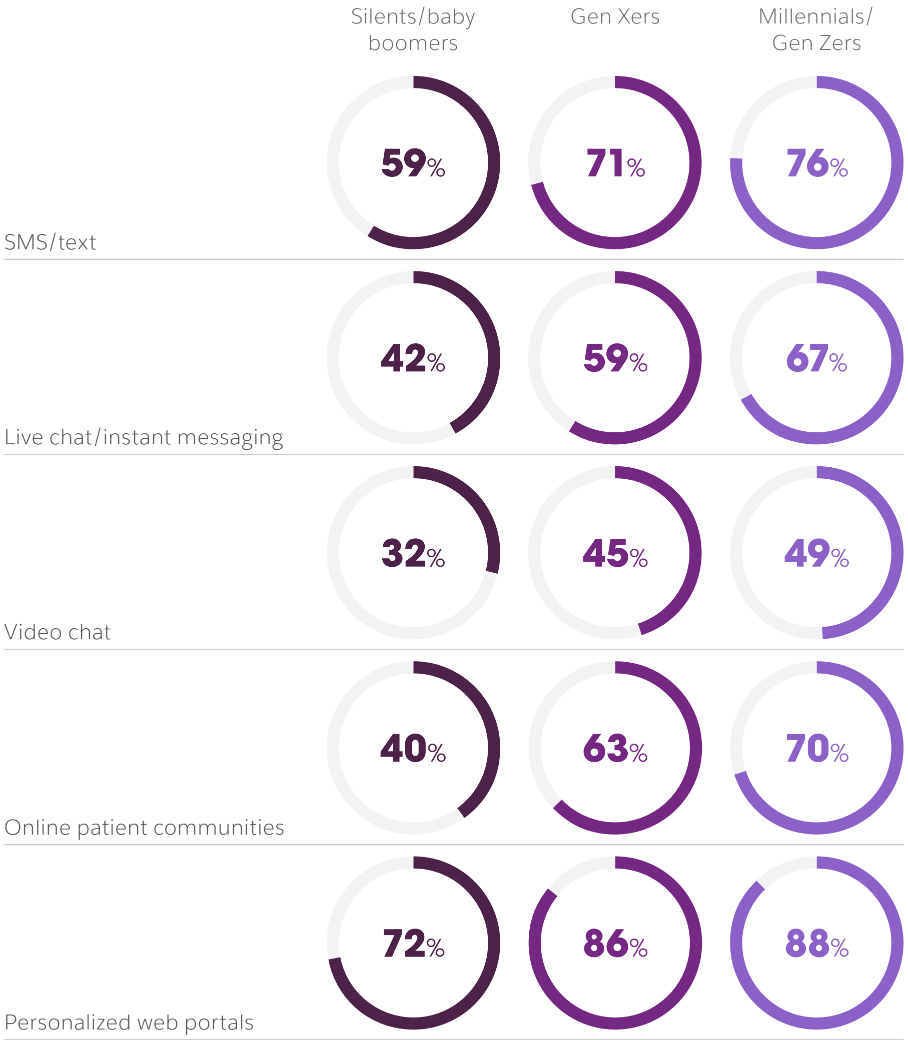
Appendix:
Medical Device Companies

CONSUMERS WHO SAY IT'S IMPORTANT FOR MEDICAL DEVICE COMPANIES TO DO THE FOLLOWING



Base: Have used a medical device in the past five years.

CONSUMERS WHO SAY IT'S IMPORTANT TO OFFER THE FOLLOWING, BY GENERATION



Base: Have used a medical device in the past five years.

Demographics

Demographics

COUNTRY

Australia	8%
Brazil	8%
France	8%
Germany	8%
Italy	8%
Japan	8%
Netherlands	8%
United Kingdom	8%
United States	33%

REGION

Europe	42%
North America	33%
Asia Pacific (Australia and Japan)	17%
Latin America	8%

GENDER

Male	54%
Female	46%
Other	1%

GENERATION

Silents/baby boomers (born before 1965)	33%
Gen Xers (born 1965–1980)	24%
Millennials/Gen Zers (born 1981–2000)	43%

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