Health care consumer views on value

Summary and highlighted findings

EY Global Consumer Health Survey 2023

EY

Building a better working world

Contents

Summary

About the survey

More than 6,000 consumers in Australia, England, Germany, Ireland, Canada and the United States (1,000 per country) were surveyed in January and March, 2023.

This report covers consumers' views on value in health care.

Methodology:

A 15-minute online survey conducted between January 12 and March 10, 2023. The sample was drawn from an approved sample provider. Quotas were set up by age, gender and regions/states to ensure the sample was representative of target populations.

A total of 6,021 completed surveys with a representative sample of the general population aged 18 and over across six markets: United States, Canada, Australia, Germany, England and Ireland. The survey data was weighted by age, gender and region to be representative of the population aged 18 and over within each country based on the latest census data available.

The margin of error was ±1.26% at the 95% level of confidence.

Summary | EY Global Consumer Health Survey 2023

How to give health consumers the access and experience they value most

EY Global Consumer Health Survey 2023 finds consumers value access most but also want cost-effective care and relief from pain and anxiety.

In brief:

- Survey finds consumers prefer in-person care to virtual, meaning virtual experience should be refined to cater to consumer segments.
- Ease of using health care services, access and improving the health of the community are top drivers of health care performance, according to consumers.
- Consumers highly value access to care. However, they rated access to care below average (42%) across six surveyed countries.

Summary, continued

What do consumers value in health care?

They want access to care when they or a family member need it. They want a cost-effective system and relief from pain and anxiety. Consumers perceive access to care as having the most value, but the EY Global Consumer Health Survey 2023 found only 37% of respondents said their health system offered good, very good or excellent access to care.

To better understand what consumers value in health care, in early 2023, EY researchers surveyed more than 6,000 consumers across six countries: the United States, Australia, Canada, Ireland, England and Germany, with the majority having had contact with the health care system in the previous 12 months.

Value in health care is deeply anchored in the responsibilities of providers and payers for overall cost and quality outcomes. Specifically, accounting for whole-of-person care through quality-linked payments, the distribution of risk and tools that drive care coordination, improve quality and financial efficiency.

But to look at value only through the lens of providers and payers leaves the consumer — the most important participant in health care — out of the value equation. We know activated, engaged patients are more likely to comply with their care plans and make behavioral decisions in support of their health.

Summary, continued

Other key findings:

- Whose responsibility? Overall, survey respondents believe the responsibility for good health lies with individuals (44%) or is a shared responsibility with their medical providers (43%). One in seven (13%) puts that responsibility with medical experts. Individuals who believe that medical experts are in charge of achieving overall good health tend to have poor or fair health, chronic conditions and are in lower income brackets.
- Who's interacting more with the system? Fifty-five percent of respondents are more proactive with their health and undertake medical checkups. Those who claim to have good, very good or excellent health (58%) are more likely to have consulted a medical professional in the past 12 months for a routine checkup. In the future, these proactive individuals are more inclined to consider monitoring their health using technologies such as genetic testing (70% vs. 68% overall) or wearable sensors (66% vs. 64% overall).
- How are they treated? Nearly three-quarters (73%) say they are treated with empathy, courtesy and respect, and over two-thirds (69%) say care plans are explained in ways that can be easily understood. Four in five rated the handling of patient privacy as good, very good or excellent.

Summary, continued

What drives health system performance from a consumer point of view?

Nearly half (49%) of survey respondents said their health care system offers above average performance, and 31% believe their health systems are performing below average.

Many said their health system performs well in critical areas, such as being up to date with the latest treatments and innovations. Across all countries, introducing the latest medical treatments and innovations (48%) and optimizing the overall health experience regardless of race, location or personal circumstance (46%) are perceived to be strong features of health systems.

Considering that consumers put the most emphasis on access when it comes to value, only 37% of global consumers in the survey said their health system offered good, very good or excellent access to care.

Summary, continued

What drives health system performance? For consumers, there are three factors:

- Ease of using health care services
- Access to care
- Improving health of the community

Health systems have the opportunity to improve their performance in the eyes of their consumers by focusing on these drivers.

Drivers of performance	All countries	Australia	Canada	England	Germany	Ireland	United States
Ease of using health care services	14	14	15	15	13	13	14
Access to care	13	15	14	14	8	12	14
Improving health of the community	11	11	12	10	14	10	13
Customer service	11	10	12	15	13	11	10
Value for money spent overall	11	11	11	8	11	13	10
Right balance between hospitals, primary and community care	10	14	10	11	10	10	9
Optimization of health experience for all regardless of race, location or personal circumstances	9	8	10	8	10	10	9
Introducing latest treatments, drugs and medical innovations	9	8	7	8	11	9	9
Mental health is of equal importance as other health issues	6	6	5	6	5	6	7
Environmental sustainability of health care system	4	3	5	4	4	5	6

Priority drivers   Secondary drivers   Ancillary drivers

Base: All respondents n= 6,021; Australia n=1,001; Canada n=1,003; England n=1,001; Germany n=1,000; Ireland n=1,016; USA n=1,000. Drivers of health care system performance – absolute importance (%).

To better understand what drives positive perceptions of the performance of health care systems, a driver analysis was undertaken that estimates the relative importance of different factors in determining the perceived performance of the health care system.

Summary, continued

What are key differences among consumer segments?

Consumers vary in their views on who is responsible for their health, whether they are making decisions for the present or the future and how involved they are in medical decision-making, giving rise to personas that health systems can use to understand how to better approach the community.

For example, the largest consumer segment emerging from the EY survey findings is among those who trend older, may be retired, and pay attention to their health to avoid getting sick in the future, even if they tend to be in good health with no chronic conditions. Roughly 60% rated their digital skills as above average. This segment, referred to as mature altruists, believes medical experts and individuals are both equally responsible for overall good health. They also tend to be partially included in medical decisions. With data insights about this consumer segment and their preferences, health systems can design access and experience strategies that make sense for this group.

Summary, continued

Consumer wants and needs vary, spotlighting opportunities for more nuanced engagement strategies.

Consumer persona	I have above-average digital skills	I am open to sharing my health data	I would consider virtual for certain care	I have good health overall*
"All About Health" Self reliant and future focused	66%	77%	51%	82%
"Price Conscious Experience Hunters" Self reliant and present/future focused	57%	70%	45%	69%
"Mature Altruists" Shared responsibility and future focused	58%	77%	46%	74%
"Experience First Youngsters" Shared responsibility and equally present/future focused	51%	64%	39%	70%
"In The Moment Strugglers" Medical expert reliant and present focused	47%	66%	33%	64%
"The Blended" Medical expert reliant and future focused	52%	74%	40%	68%

* "Good health" includes those who said they were in "good, very good or excellent overall health."

An analysis of consumer responses to the EY survey spotlighted six consumer segments with varying degrees of participation in their health care, openness to virtual and decision-making styles. They also take different views on who is ultimately responsible for their health.

Summary, continued

Why do consumers still prefer in-person to virtual care, and how do they perceive data sharing?

In the EY survey findings, face-to-face consultations were generally viewed more positively than virtual consultations, especially when it came to:

- The ability to show the health condition to professionals (84%)
- Developing a personal connection with the medical practitioner (77%)
- The overall quality of the consultation (71%)
- Being given the confidence that their health concerns can be taken care of (67%)

Summary, continued

However, virtual consultations have a role to play, in particular when someone doesn't want to wait for an in-person appointment (34%) and for convenience (31%). Across the six countries surveyed, over two in five (44%) are willing to consider a virtual consultation, especially in these situations:

- Renew a prescription (67%)
- Discuss test results (61%)
- Save time (57%)
- For a minor medical condition (56%)

In the survey, consumers also indicated openness to data sharing. Overall, three-quarters (73%) of survey respondents would agree to have their medical information automatically shared electronically with the different places they receive medical care. But they made clear they want to know upfront how that personal health information is protected and used (79% agree/strongly agrees).

Summary, continued

What will they agree to share?

▸ Biometric data (such as blood pressure or blood glucose)	77%
▸ Dietary or nutritional information	72%
▸ Lifestyle choices (such as smoking or drinking alcohol)	71%
▸ Patient-reported outcomes	66%
▸ Genetic information	63%

As for the profile of those who are more open to sharing, those with a chronic health condition (77%) and those aged 65 years or more (76%) are more likely to agree to have their information shared. Individuals are more likely to share information for research purposes (65% agree), as opposed to helping pharmaceutical companies and medical device manufacturers improve the effectiveness of their products (50%).

Summary, continued

What do consumers view as the future of health care?

The future of wellness can only be realized by embracing emerging technologies to move care closer to the consumer wherever they are. So how open are consumers to concepts such as hospital at home and genetic testing that will power the future of health and wellness? The EY survey found:

- 68% are prepared to take a genetic test to assess predispositions to diseases
- 66% agree to take medication that matches their genetic profile
- 66% are also prepared to access health care services in non-health care facilities (i.e., home or store)
- 64% agree to use wearable devices to collect their health information (blood pressure or blood glucose) and send it to the doctor
- 60% to be treated via a hospital-in-the-home program

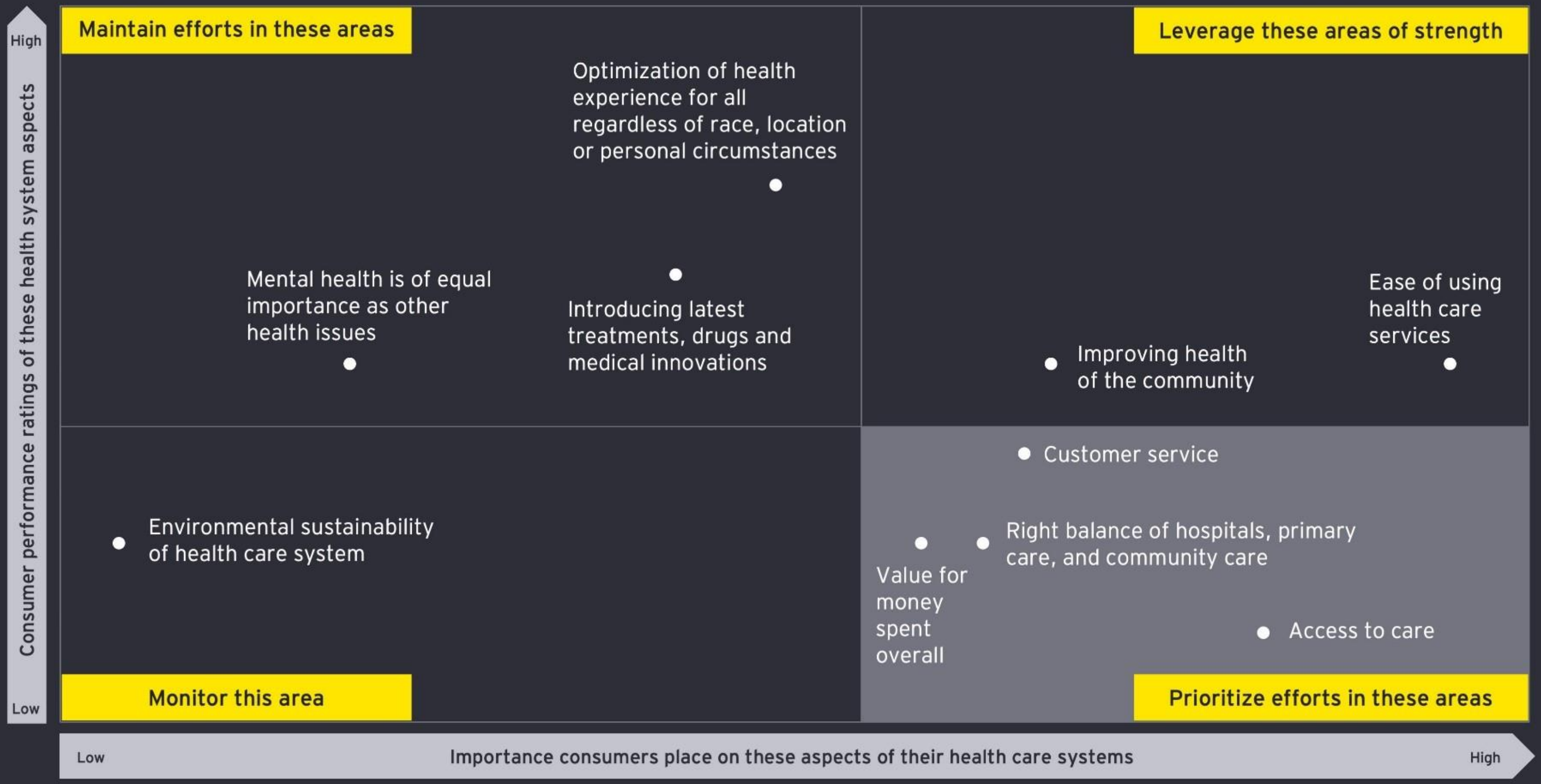
On the other hand, individuals are less inclined to use products defined as "high tech" to treat a health condition, such as smart pills that travel with the bloodstream and transmit messages to their phones, with 43% agreeing to use them.

Summary, continued

Key actions for health organizations

The survey findings spotlight key opportunity zones for health systems. The biggest opportunities lie in improving those aspects consumers rated as very important but where they rated their current health system as having lower performance (as shown in the matrix on the right).

Where to focus efforts for improved consumer perceptions



Base: All respondents n= 6,021; Australia n=1,001; Canada n=1,003; England n=1,001; Germany n=1,000; Ireland n=1,016; USA n=1,000. Q10. How would you rate the overall performance of the health care system? Q11. How would you rate the performance of the following aspects of the health care system? Driver analysis results based on Q10 and Q11.

This analysis creates four quadrants defined by plotting the importance of the different aspects of the health care system (on the X axis) and rating those same statements (on the Y axis). This analysis can assist in identifying potential areas of opportunity to leverage.

Summary, continued

Five clear priorities for health executives to give consumers the access and experience they value most:

1. Rethink how consumers access your system. With access to care being most valued by consumers, think through how your consumers engage with various points in your system. Are your processes easy to navigate from a patient perspective? With staff shortages and other challenges, it may be difficult to eliminate all sources of frustration like wait times, but better communication about the cause of waits or what they should expect can make consumers feel less in the dark. Are you communicating to certain groups in meaningful ways? And when patients leave your care, are the next steps seamless, or could they cause confusion? Routing patients to the most appropriate sites of care is also important in reducing unnecessary visits to high-cost sites. The survey findings also show that people want to feel better and lessen their pain, so their engagement with the system should focus on lessening that pain and frustration.
2. Empower consumers with digital tools and technology. Some of the friction consumers experience when trying to access health care services can be addressed with intuitive digital tools that keep them informed and lead to more consistent engagement. Do you have digital front doors that help them find what they need when they need it? Can you automate communications according to their preference for text, phone or email to keep them informed of their care process or to nudge them to take proactive steps?

Summary, continued

3. Design better consumer experiences with data insights about your populations and their preferences. The first step for health organizations is to root their consumer engagement strategies in a deep understanding of their customers guided by data insights about the reality of how they live their lives. Consumers at different stages of life value different modes of care — busy professionals and rural residents may value virtual visits more, while an elderly patient without a smartphone may value seeing their physician face to face. Design care pathways according to those different personas, the barriers to care they face, and their preferences.

4. Improve the virtual experience and integrate it seamlessly where it makes sense. The survey results suggest more work for health organizations when it comes to the virtual care experience to build trust and better relationships with consumers. As learned during the pandemic, it takes extra skill to develop personal relationships through a computer or phone screen, and the survey results suggest consumers doubt their ability to bond with clinicians over video. Training efforts to boost the ways that clinicians can make patients feel seen and heard during virtual visits can help improve the experience and boost consumer confidence in it. Opportunities exist to expand virtual in areas where consumers indicated interest: to offer more convenience or address delays in scheduling. Personalized strategies that again consider the lives of the patient and their preferences can help land on integrated strategies that make sense. Communications with consumers should stress the message that virtual care is part of the overall process and not less than other care modes.

Summary, continued

5. Educate consumers on the value of data sharing and new technologies to improve health. While consumers indicated openness to data-sharing, they were a bit more hesitant about products that could be perceived as too futuristic for now. As the care delivery model shifts toward the home, powered by wearables and informed by patient data, consumers need to be brought along step by step so they can develop comfort with health care settings that may seem unconventional today. The survey found that 60% to 67% of individuals believe that remote monitoring and delivery of patient care will become a reality in the next ten years. Health systems can start educating consumers on how these technologies can help keep consumers healthier at home longer and provide better value for the system and the consumer.

In the following sections, highlighted findings from the six surveyed countries are provided.

Methodology endnotes

Driver analysis:

A driver analysis was used to estimate the relative importance of different aspects of the health care system in driving overall perception of the performance of the health care system. Results were calculated using linear regression with an R-squared value of 0.6793. All components had $p<0.05$. Results have been shown as absolute relative values. Cases with missing data were excluded from analysis. 14% of the total variance in the overall performance is explained by the ease of using health care services.

TURF analysis:

TURF Analysis (Total Unduplicated Reach and Frequency) is a type of statistical analysis used for providing estimates of market potential and optimal strategies given limited resources. TURF analysis identifies the potential proportion of individuals that could be reached with a set of features/benefits.

Australia findings

Me and my health care system

‘What matters most to me.’

Understanding what matters most to health care consumers and how this drives choice-making is complex.

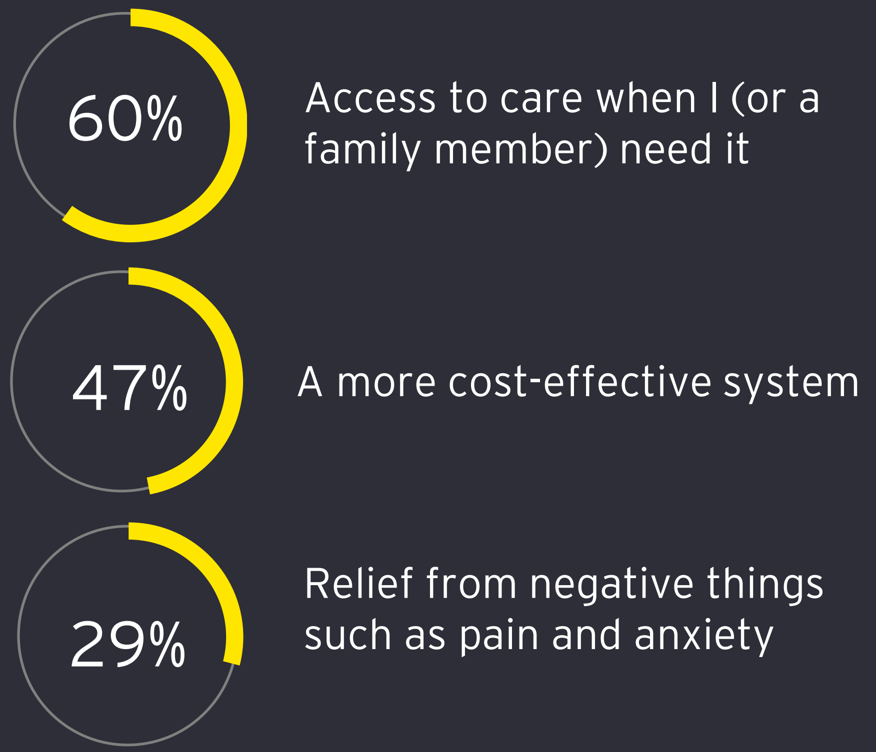
Yet this is vital intelligence as health care continues on the journey to being value-driven.

For consumers, access at the time of need is vitally important, but also highly valued is a state of healthiness and a life well lived.

Also for consumers, a health care system should deliver value through being cost-effective.

Consumers: Australia

Q: Thinking about what you value from the health care system, which of the following do you value the most?



Ordered ranking of top three preferences, shows total of top three preferences (first, second, third).

Consumers (n) = 1,001

‘Responsibility for achieving overall good health primarily rests with me.’

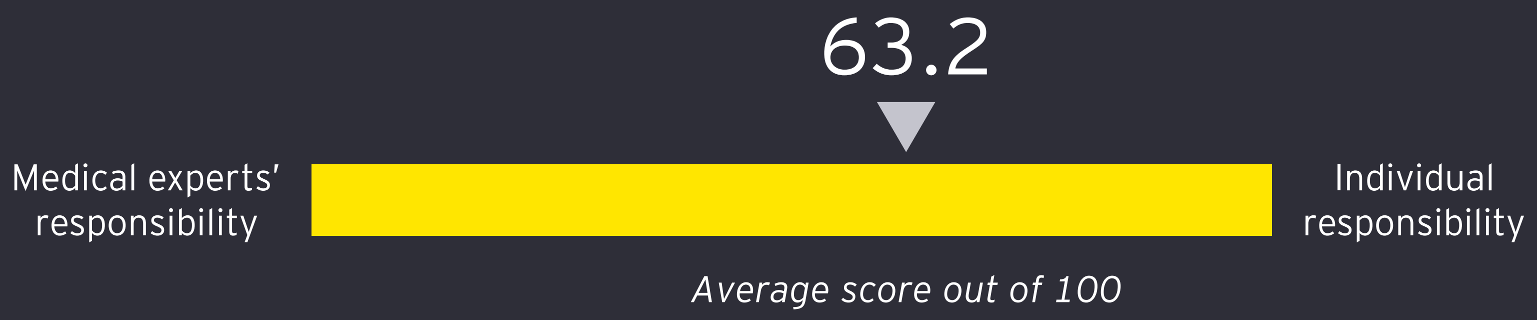
A strong sense of independence and managing oneself exists.

Responsibility for achieving overall good health lies with the individual. Few fully cede this to medical experts, but many do expect a degree of expert guidance.

Believing that they are in control and taking responsibility for their own actions further supports consumers’ active engagement in the optimal management of their health and care.

Consumers: Australia

Q: “To me, responsibility for achieving overall good health lies with …”



Slider scale 1 to 100 with left anchor being “Medical experts who are responsible for treating people when they are ill and to also help them maintain overall good health” and right anchor being “Individuals who are responsible for managing their own lifestyle and overall good health.”

Consumers (n) = 1,001

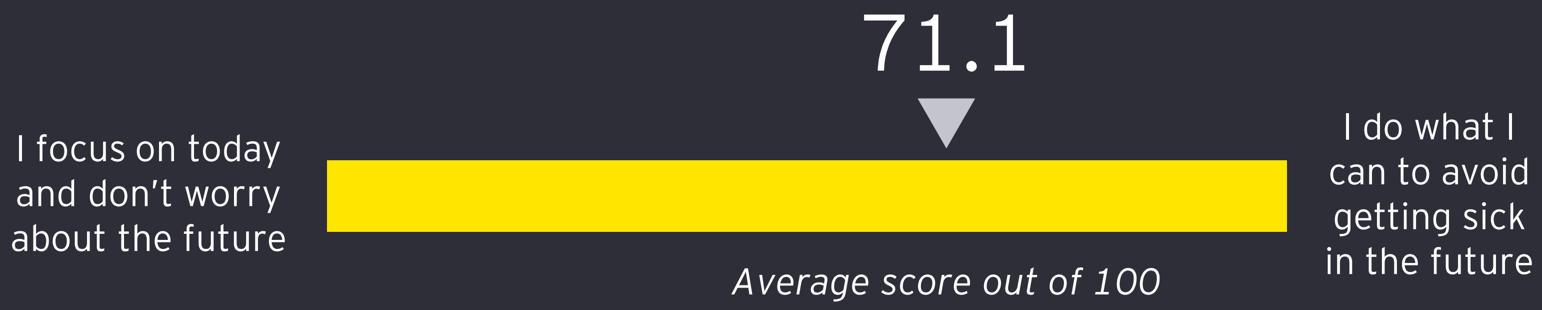
‘Live life to the fullest … now or in the future?’

Healthiness is highly valued and this motivates people – to be healthy but also to avoid becoming unhealthy.

Priorities lie in more distant rewards arising from taking actions to secure future good health rather than living for the moment.

Consumers: Australia

Q: “When weighing up the importance of paying attention to one’s health in the present versus the future, I believe …”



Slider scale 1 to 100 with left anchor being “Paying attention to my health is important but I focus on today and don’t worry about getting sick in the future” and right anchor being “Paying attention to my health is important and I do what I can to avoid getting sick in the future.”

Consumers (n) = 1,001

'My health care system is good, it but could be better.'

A mixed report card on the overall performance of the Australian health system – generally well regarded but for some, there is room for improvement.

The Australian health care system does many things well. Consumers consider it is highly technologically advanced; **60%** say it is above average in this aspect.

Consumers also rate as above average:

- Ease of using health care, **58%**
- Customer service focus, **56%**
- Improving the health of the community, **55%**

However, environmental sustainability could improve; **39%** say this is average.

Consumers: Australia

Q: How would you rate the overall performance of the Australian health care system?

64%	19%	17%
Above Average	Average	Below Average

"Above average" is top three (5-7) ratings on a seven-point scale, where 7 is "Excellent" and "Below average" is bottom three (1-3) ratings.

Consumers (n) = 1,001

‘The experience is important to me.’

The health care experience is important to consumers, and views regarding equitable treatment are spread across the board.

Consider that the health system optimizes the experience of health care regardless of race, location or personal circumstances.

Consumers: Australia

Q: How would you rate the performance of the following aspect of the health care system in Australia?

- Optimizing the human health experience for all people, no matter their race, location or personal circumstances

56%	24%	20%
Above Average	Average	Below Average

“Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”; “Below Average” 1-3 ratings)

Consumers (n) = 1,001

‘For me, value comes from a few key qualities of my health care system.’

Value is multidimensional.

People factors relate to the experience of health care: whether someone is treated with empathy, courtesy and respect and whether they have the opportunity to shape and make choices about their care.

Process and place factors are practical: a safe, clean environment; convenience; and up-to-date care.

Consumers (n) =867 (excludes those who have not used a health care service in the past 12 months).

Consumers: Australia

Q: Thinking about the health care services you received in the last 12 months, how would you rate your experience on the following aspects?

People factors

87%
My privacy is respected

79%
I am treated with empathy, courtesy and respect

77%
I have a say in my care and can be actively involved in the care process

Process and place factors

84%
The care environment is safe, clean and comfortable

76%
The doctor or health professional is up to date with modern treatments and technologies, and offers them

65%
There is convenient parking

Showing “Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”)

Me, virtual care, and the future of health care

‘I prefer in-person consultations for most health-related things.’

Technology has made it possible to receive many medical and health services virtually, but consumers strongly prefer in-person consultations.

Consumers: Australia

Q: Please select whether a medical or health care consultation is better virtually (i.e., by phone or video) or in person (i.e., in a doctor or health professional’s office or clinic).

In-person consultation is better than a virtual consultation to:

Quality and outcome

- 88% Show a physical problem
- 80% Personal connection
- 73% Overall quality
- 67% Resolve an issue

Convenience

- 57% Time spent with doctor
- 46% Overall convenience

Utility

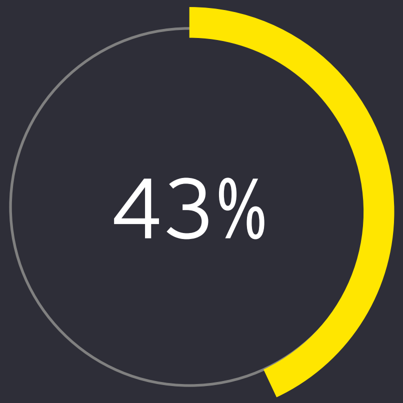
- 32% Overall cost
- 27% Wait times

Showing “In-person is better.”
A four-point scale of virtual is better; in-person is better; no difference; don’t know.

Consumers (n) = 1,001

‘But I am open to switching to virtual primary care.’

Despite an overwhelming preference for in-person consultations, most consumers are open to switching to virtual primary care; just **9%** say they would definitely not consider doing so.



Probably would or definitely would consider switching to a virtual primary care consultation in substitution for an in-person one

Consumers: Australia

Q: To what extent would you consider a virtual consultation with your general practitioner rather than a consultation in person?

Definitely and probably would consider	May or may not consider	Definitely and probably would not consider
43%	32%	25%

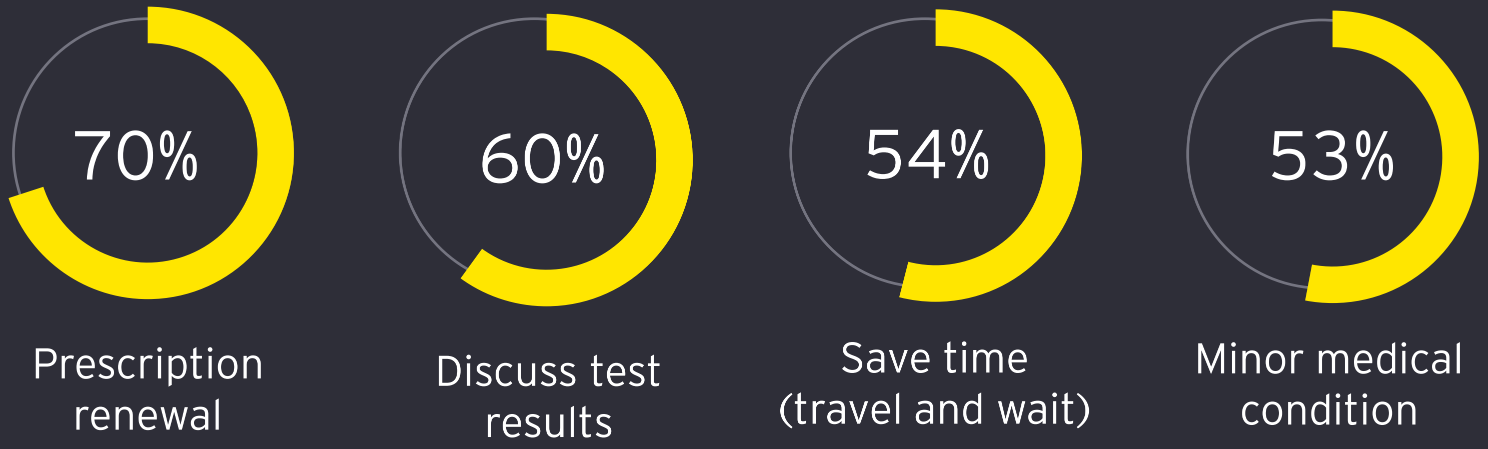
Consumers (n) = 1,001

‘I would switch to virtual consultations for minor matters or greater convenience.’

Consumers would switch to a virtual consultations for greater convenience, care for minor medical matters and completing paperwork.

Consumers: Australia

Q: Which of the following would make you switch from an in-person consultation to a virtual consultation with your general practitioner?



Consumers (n) = 911, excludes consumers who responded in an earlier question that they would “definitely not” use virtual care.

‘I would share certain information to get better care, but financial information is not relevant.’

Q: How willing would you be to share the following information with doctors and health professionals to help them treat you more comprehensively?

Ratings: would probably/definitely share

Consumers: Australia

Financial information
17%

Biometric data
79%

Grocery shopping
46%

Diet and nutrition
74%

Exercise and activity patterns
59%

Genetic information 66%

Lifestyle choices and habits
72%

Q: “Sharing this information with a doctor or health professional would definitely help me to become healthier:”

Ratings: would definitely help/help to some extent

Biometric data	91%
Diet and nutrition	87%
Lifestyle choices and habits	85%

Q: To what extent do you think sharing financial information with your doctor or health professional would help you become healthier?

Ratings: “would not make any difference”

65% say sharing financial information would not make any difference to health outcomes.

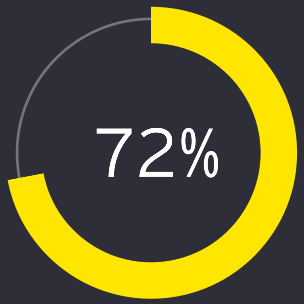
Consumers (n) = 1,001

‘I am open to technology-enhanced care for more personalized care and better health care experiences.’

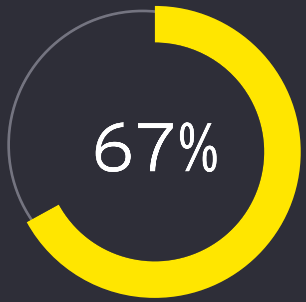
Consumers are open to personalized medicines, predictive genetic testing and non-urgent care in retail locations. Using wearables and sensors to monitor health at home also appeals.

Consumers: Australia

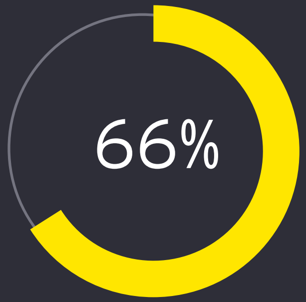
Q: “To monitor and/or improve my health, I am prepared to ...”



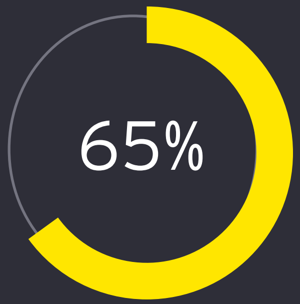
Take a genetic test to see if I might develop certain diseases or disorders



Take medications made just for me (they match my genetic profile)



Be treated through a hospital-in-the-home program



Have non-urgent care from a health professional at a mini clinic in a department store, supermarket or pharmacy

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree”

Consumers (n) = 1,001

‘I see a big future for technology in health care over the next decade.’

Emerging technology such as precursors of the metaverse – virtual presence and artificial intelligence were met with more caution compared with more familiar technologies: **56%** agree that artificial intelligence and **47%** agree that virtual presence will become common in the next decade.

Consumers: Australia

Q: To what extent do you believe the following will likely occur in the health industry in the next 10 years?

Hospital-in-the-home will be an alternative to in-patient care

Digital technologies monitor patients at home

Virtual hospitals will deliver basic medical care remotely

Precision medicine will become part of primary care

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree.” Consumers (n) = 1,001

Canada findings

Me and my health care system

‘What matters most to me.’

Understanding what matters most to health care consumers and how this drives choice-making is complex.

Yet this is vital intelligence as health care continues on the journey to being value-driven.

For consumers, access at the time of need is vitally important, but also highly valued is a state of healthiness and a life well lived.

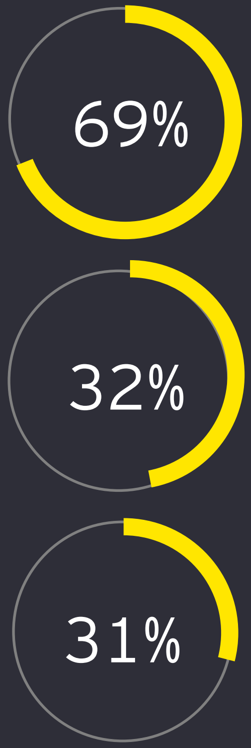
Also for consumers, a health care system should deliver value through being cost-effective.

Ordered ranking of top three preferences, shows total of top three preferences (first, second, third).

Consumers (n) = 1,003

Consumers: Canada

Q: Thinking about what you value from the health care system, which of the following do you value the most?



Access to care when I (or a family member) need it

Relief from negative things such as pain and anxiety

I (or a family member) achieve better levels of health

‘Responsibility for achieving overall good health primarily rests with me.’

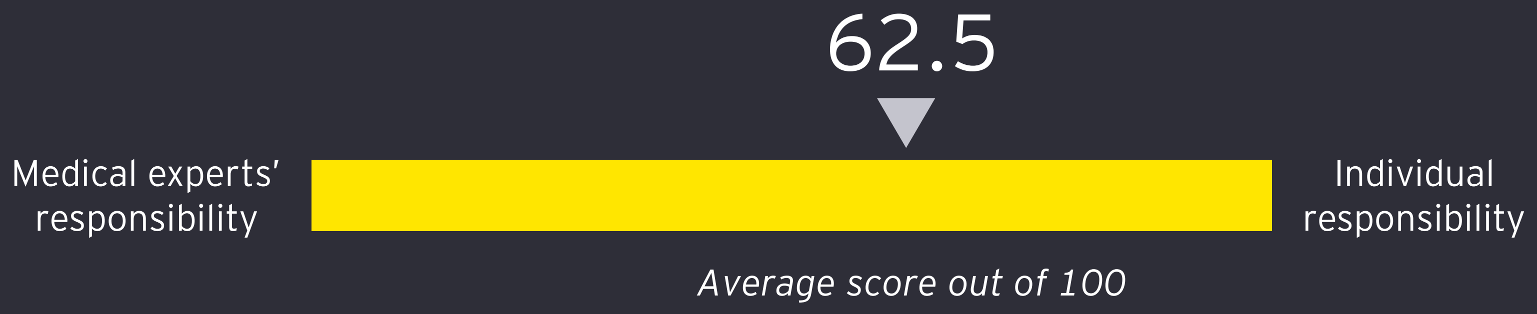
A strong sense of independence and managing oneself exists.

Responsibility for achieving overall good health lies with the individual. Few fully cede this to medical experts, but many do expect a degree of expert guidance.

Believing that they are in control and taking responsibility for their own actions further supports consumers’ active engagement in the optimal management of their health and care.

Consumers: Canada

Q: “To me, responsibility for achieving overall good health lies with …”



Slider scale 1 to 100 with left anchor being “Medical experts who are responsible for treating people when they are ill and to also help them maintain overall good health” and right anchor being “Individuals who are responsible for managing their own lifestyle and overall good health.”

Consumers (n) = 1,003

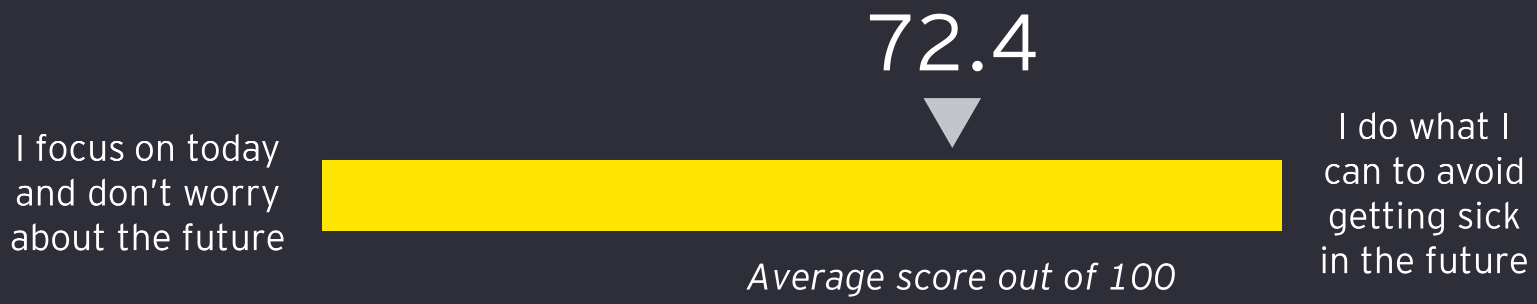
‘Live life to the fullest … now or in the future?’

Healthiness is highly valued and this motivates people – to be healthy but also to avoid becoming unhealthy.

Priorities lie in more distant rewards arising from taking actions to secure future good health rather than living for the moment.

Consumers: Canada

Q: “When weighing up the importance of paying attention to one’s health in the present versus the future, I believe …”



Slider scale 1 to 100 with left anchor being “Paying attention to my health is important but I focus on today and don’t worry about getting sick in the future” and right anchor being “Paying attention to my health is important and I do what I can to avoid getting sick in the future.”

Consumers (n) = 1,003

'My health care system is good, but it could be better.'

A mixed report card on the overall performance of the Canadian health system – generally well regarded but for many consumers, there is room for improvement.

The Canadian health care system does many things well. Consumers consider it is highly technologically advanced; **47%** say it is above average in this aspect.

However, consumers expect:

- Improved access to care; **47%** say this is below average.
- Better balance in the service mix (between hospitals and primary care); **41%** say this is below average.
- Environmental sustainability; **40%** say this is average.

Consumers: Canada

Q: How would you rate the overall performance of the Canadian health care system?

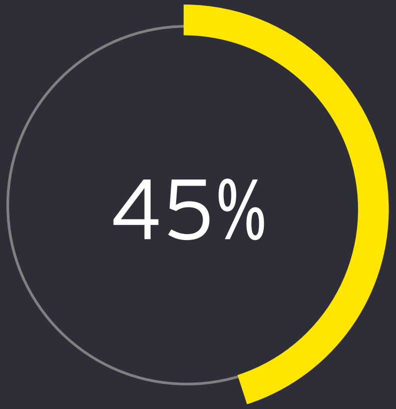
47%	19%	34%
Above Average	Average	Below Average

"Above average" is top three (5-7) ratings on a seven-point scale, where 7 is "Excellent" and "Below average" is bottom three (1-3) ratings.

Consumers (n) = 1,003

‘The experience is important to me.’

The health care experience is important to consumers, and views regarding equitable treatment are spread across the board.



Consider that the health system optimizes the experience of health care regardless of race, location or personal circumstances.

Consumers (n) = 1,003

Consumers: Canada

Q: How would you rate the performance of the following aspect of the health care system in Canada?

- Optimizing the human health experience for all people, no matter their race, location or personal circumstances

45% Above Average	23% Average	32% Below Average

“Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”; “Below Average” 1-3 ratings)

‘For me, value comes from a few key qualities of my health care system.’

Value is multidimensional.

People factors relate to the experience of health care: whether someone is treated with empathy, courtesy and respect and whether they have the opportunity to shape and make choices about their care.

Process and place factors are practical: a safe, clean environment; convenience; and up-to-date care.

Consumers (n) =826 (excludes those who have not used a health care service in the past 12 months).

Consumers: Canada

Q: Thinking about the health care services you received in the last 12 months, how would you rate your experience on the following aspects?

People factors

79%
My privacy is respected

70%
I am treated with empathy, courtesy and respect

64%
I have a say in my care and can be actively involved in the care process

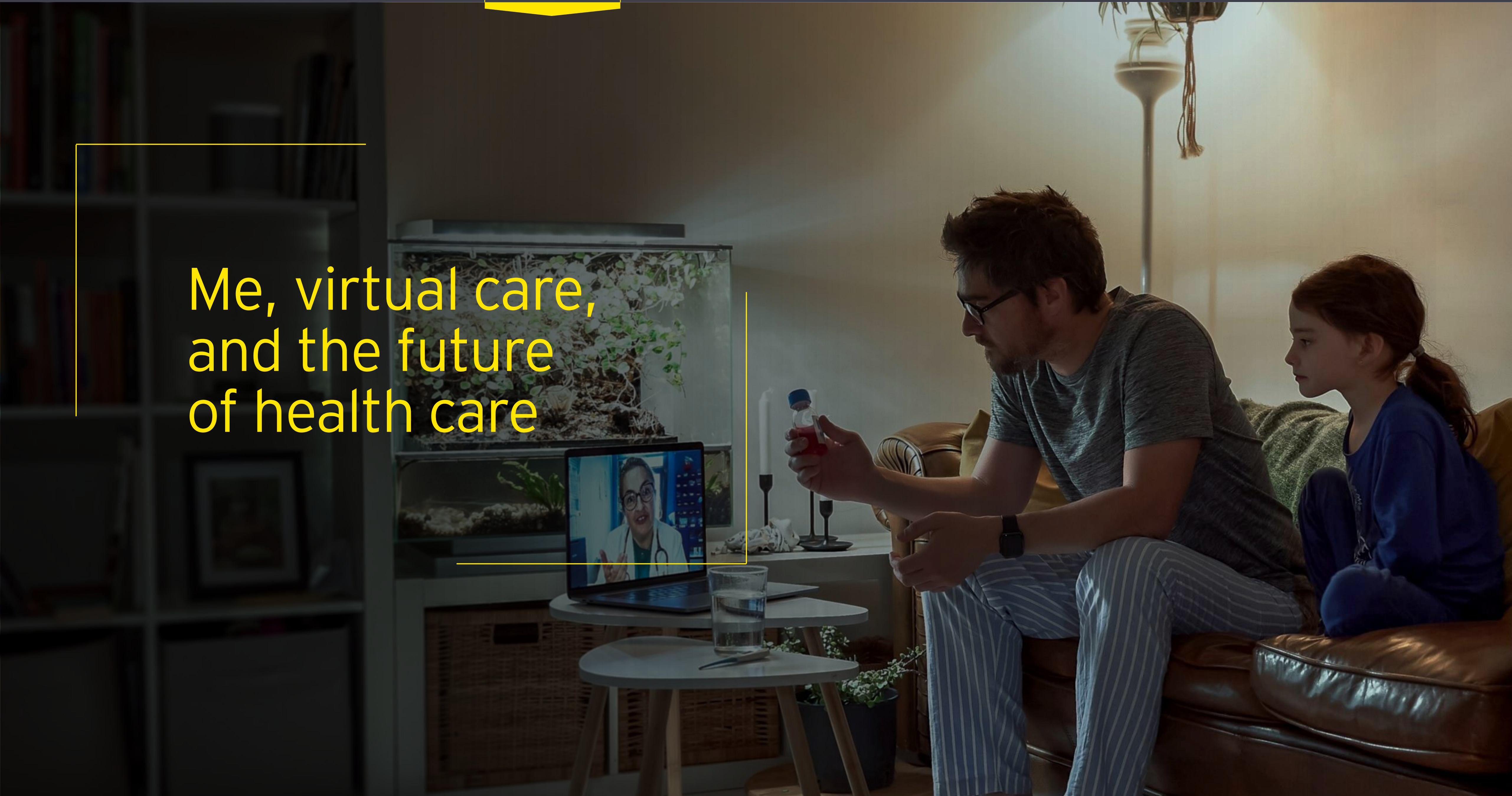
Process and place factors

75%
The care environment is safe, clean and comfortable

69%
The doctor or health professional is up to date with modern treatments and technologies, and offers them

56%
There is convenient parking

Showing “Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”)



Me, virtual care, and the future of health care

‘I prefer in-person consultations for most health-related things.’

Technology has made it possible to receive many medical and health services virtually, but consumers strongly prefer in-person consultations.

Consumers: Canada

Q: Please select whether a medical or health care consultation is better virtually (i.e., by phone or video) or in person (i.e., in a doctor or health professional’s office or clinic).

In-person consultation is better than a virtual consultation to:

Quality and outcome

- 84% Show a physical problem
- 72% Personal connection
- 66% Overall quality
- 61% Resolve an issue

Convenience

- 47% Time spent with doctor
- 40% Overall convenience

Utility

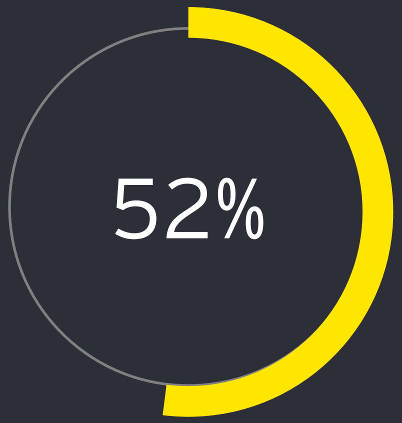
- 29% Overall cost
- 24% Wait times

Showing “In-person is better.”
A four-point scale of virtual is better; in-person is better; no difference; don’t know.

Consumers (n) = 1,003

‘But I am open to switching to virtual primary care.’

Despite an overwhelming preference for in-person consultations, most consumers are open to switching to virtual primary care; just **6%** say they would definitely not consider doing so.



Probably would or definitely would consider switching to a virtual primary care consultation in substitution for an in-person one

Consumers: Canada

Q: To what extent would you consider a virtual consultation with your family physician rather than a consultation in person?

Definitely and probably would consider	May or may not consider	Definitely and probably would not consider
52%	30%	18%

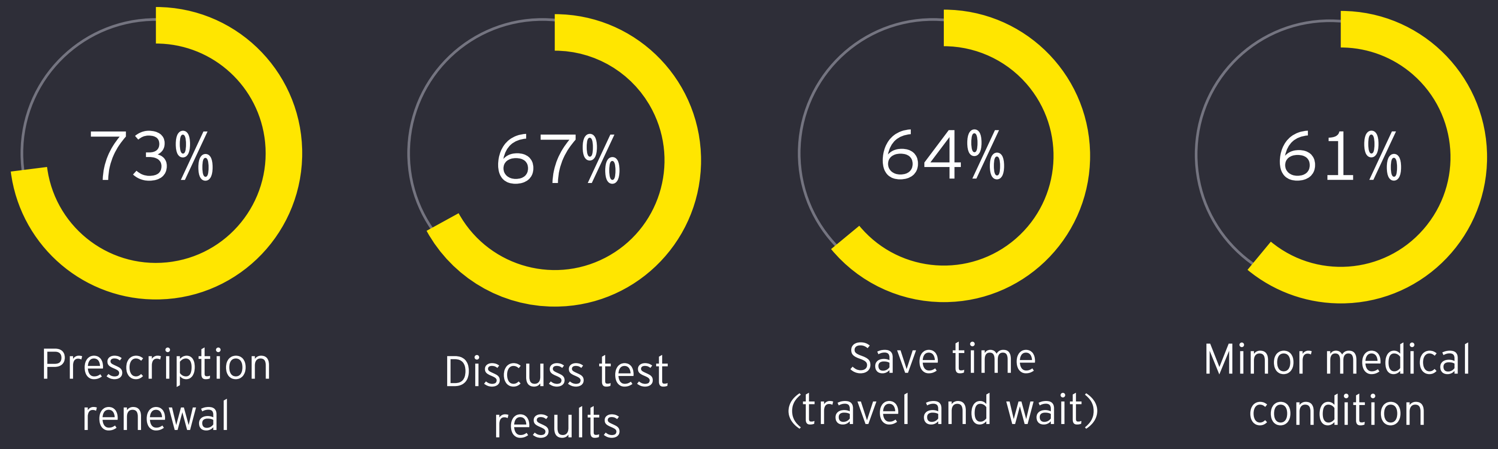
Consumers (n) = 1,003

‘I would switch to virtual consultations for minor matters or greater convenience.’

Consumers would switch to a virtual consultations for greater convenience, care for minor medical matters and completing paperwork.

Consumers: Canada

Q: Which of the following would make you switch from an in-person consultation to a virtual consultation with your family physician?



Consumers (n) = 942, excludes consumers who responded in an earlier question that they would “definitely not” use virtual care.

‘I would share certain information to get better care, but financial information is not relevant.’

Q: How willing would you be to share the following information with doctors and health professionals to help them treat you more comprehensively?

Ratings: would probably/definitely share

Consumers: Canada

Financial information 18%

Biometric data 78%

Grocery shopping 54%

Diet and nutrition 77%

Exercise and activity patterns 61%

Genetic information 66%

Lifestyle choices and habits 76%

Q: “Sharing this information with a doctor or health professional would definitely help me to become healthier:”

Ratings: would definitely help/help to some extent

Biometric data	90%
Lifestyle choices and habits	89%
Diet and nutrition	89%

Q: To what extent do you think sharing financial information with your doctor or health professional would help you become healthier?

Ratings: would not make any difference

65% say sharing financial information would not make any difference to health outcomes.

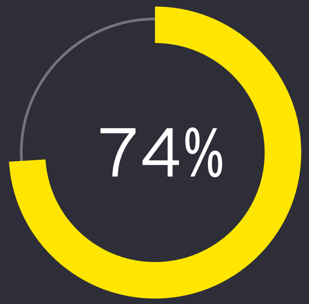
Consumers (n) = 1,003

‘I am open to technology-enhanced care for more personalized care and better health care experiences.’

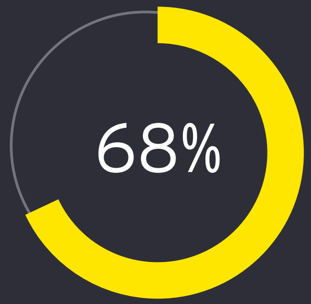
Consumers are open to personalized medicines, predictive genetic testing and non-urgent care in retail locations. Using wearables and sensors to monitor health at home also appeals.

Consumers: Canada

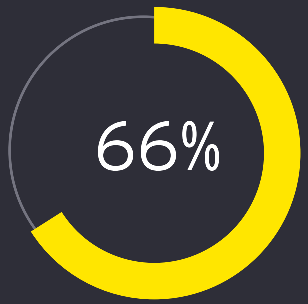
Q: “To monitor and/or improve my health, I am prepared to …”



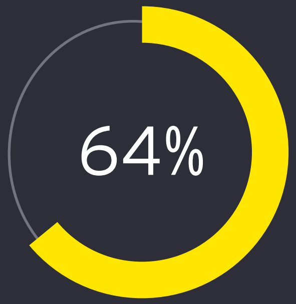
Have non-urgent care from a health professional at a mini clinic in a department store, supermarket or pharmacy



Take a genetic test to see if I might develop certain diseases or disorders



Take medications made just for me (they match my genetic profile)



Be treated through a hospital-in-the-home program

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree”
Consumers (n) = 1,003

‘I see a big future for technology in health care over the next decade.’

Emerging technology such as precursors of the metaverse — virtual presence and artificial intelligence were met with more caution compared with more familiar technologies: **56%** agree that artificial intelligence and **50%** agree that virtual presence will become common in the next decade.

Consumers: Canada

Q: To what extent do you believe the following will likely occur in the health industry in the next 10 years?

Digital technologies monitor patients at home

Hospital-in-the-home will be an alternative to in-patient care

Virtual hospitals will deliver basic medical care remotely

Precision medicine will become part of primary care

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree.” Consumers (n) = 1,003

England findings

Me and my health care system

‘What matters most to me.'

Understanding what matters most to health care consumers and how this drives choice-making is complex.

Yet this is vital intelligence as health care continues on the journey to being value-driven.

For consumers, access at the time of need is vitally important, but also highly valued is a state of healthiness and a life well lived.

Also for consumers, a health care system should deliver value through being cost-effective.

Consumers: England

Q: Thinking about what you value from the health care system, which of the following do you value the most?

68% — Access to care when I (or a family member) need it

35% — Relief from negative things such as pain and anxiety

31% — A healthier and fairer society

Ordered ranking of top three preferences, shows total of top three preferences (first, second, third).

Consumers (n) = 1,001

‘Responsibility for achieving overall good health primarily rests with me.’

A strong sense of independence and managing oneself exists.

Responsibility for achieving overall good health lies with the individual. Few fully cede this to medical experts, but many do expect a degree of expert guidance.

Believing that they are in control and taking responsibility for their own actions further supports consumers’ active engagement in the optimal management of their health and care.

Consumers: England

Q: “To me, responsibility for achieving overall good health lies with …”

Average score out of 100

Slider scale 1 to 100 with left anchor being “Medical experts who are responsible for treating people when they are ill and to also help them maintain overall good health” and right anchor being “Individuals who are responsible for managing their own lifestyle and overall good health.”

Consumers (n) = 1,001

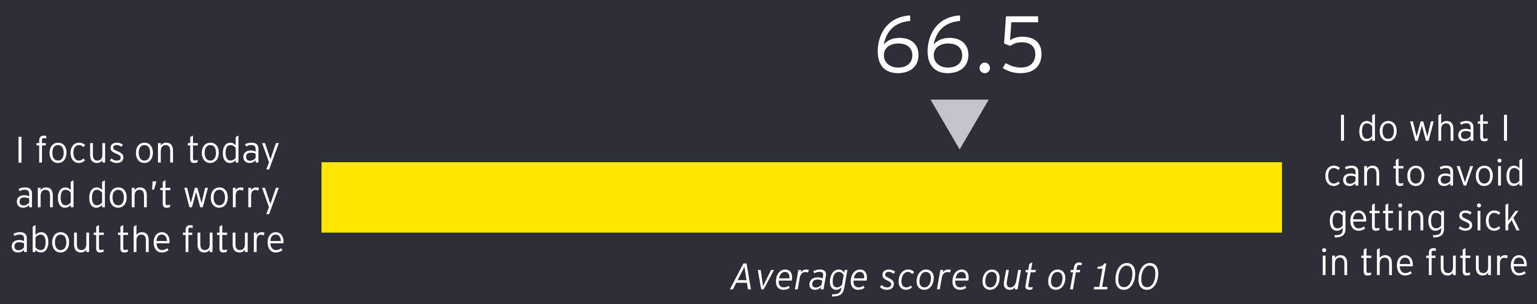
'Live life to the fullest … now or in the future?'

Healthiness is highly valued and this motivates people – to be healthy but also to avoid becoming unhealthy.

Priorities lie in more distant rewards arising from taking actions to secure future good health rather than living for the moment.

Consumers: England

Q: "When weighing up the importance of paying attention to one's health in the present versus the future, I believe …"



Slider scale 1 to 100 with left anchor being "Paying attention to my health is important but I focus on today and don't worry about getting sick in the future" and right anchor being "Paying attention to my health is important and I do what I can to avoid getting sick in the future."

Consumers (n) = 1,001

‘My health care system is good, but it could be better.’

A mixed report card on the overall performance of the National Health System – generally well regarded but for many consumers, there is room for improvement.

The National Health System does many things well. Consumers consider it is highly technologically advanced; **44%** say it is above average in this aspect.

However, consumers expect:

- Improved access to care; **50%** say this is below average.
- Ease of using health care; **45%** say this is below average.
- Better balance in the service mix (between hospitals and primary care); **45%** say this is below average.

Consumers: England

Q: How would you rate the overall performance of the National Health System?

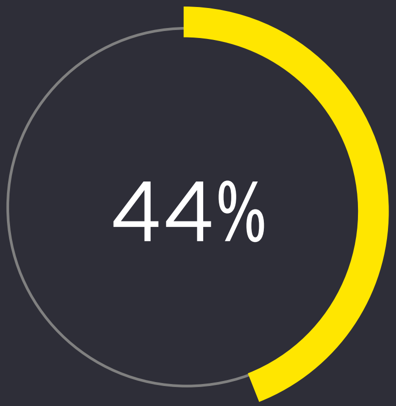
47% Above Average	17% Average	36% Below Average

“Above average” is top three (5-7) ratings on a seven-point scale, where 7 is “Excellent” and “Below average” is bottom three (1-3) ratings.

Consumers (n) = 1,001

‘The experience is important to me.’

The health care experience is important to consumers, and views regarding equitable treatment are spread across the board.



Consider that the health system optimizes the experience of health care regardless of race, location or personal circumstances.

Consumers: England

Q: How would you rate the performance of the following aspect of the health care system in England?

- Optimizing the human health experience for all people, no matter their race, location or personal circumstances

44% Above Average	26% Average	30% Below Average

“Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”; “Below Average” 1-3 ratings)

Consumers (n) = 1,001

‘For me, value comes from a few key qualities of my health care system.’

Value is multidimensional.

People factors relate to the experience of health care: whether someone is treated with empathy, courtesy and respect and whether they have the opportunity to shape and make choices about their care.

Process and place factors are practical: a safe, clean environment; convenience; and up-to-date care.

Consumers: England

Q: Thinking about the health care services you received in the last 12 months, how would you rate your experience on the following aspects?

People factors

80%
My privacy is respected

70%
I am treated with empathy, courtesy and respect

60%
I feel listened to and my needs and preferences are understood

Process and place factors

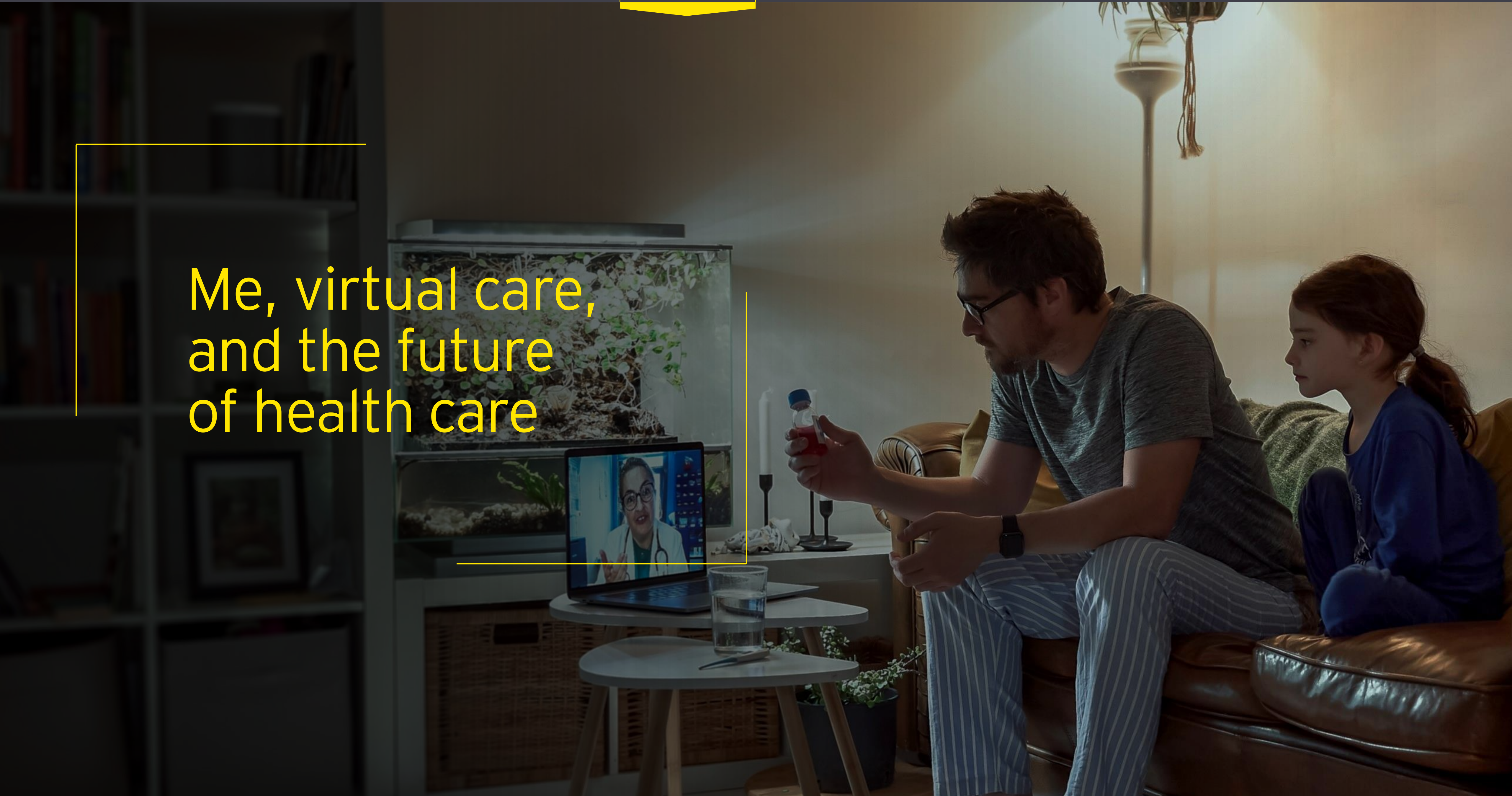
74%
The care environment is safe, clean and comfortable

67%
The location is convenient (near my home or work)

66%
The doctor explains the care plan and my choices in a way I can understand

Consumers (n) =720 (excludes those who have not used a health care service in the past 12 months).

Showing “Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”)



Me, virtual care, and the future of health care

‘I prefer in-person consultations for most health-related things.’

Technology has made it possible to receive many medical and health services virtually, but consumers strongly prefer in-person consultations.

Consumers: England

Q: Please select whether a medical or health care consultation is better virtually (i.e., by phone or video) or in person (i.e., in a doctor or health professional’s office or clinic).

In-person consultation is better than a virtual consultation to:

Quality and outcome

- 86% Show a physical problem
- 78% Personal connection
- 74% Overall quality
- 68% Resolve an issue

Convenience

- 56% Time spent with doctor
- 47% Overall convenience

Utility

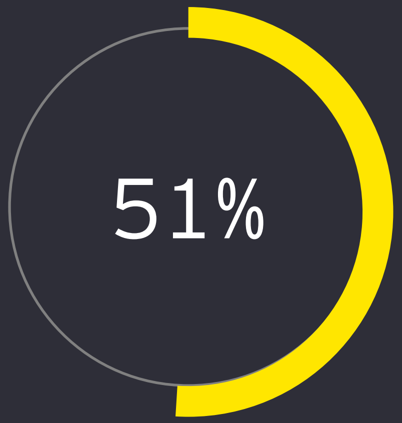
- 31% Overall cost
- 27% Wait times

Showing “In-person is better.”
A four-point scale of virtual is better; in-person is better; no difference; don’t know.

Consumers (n) = 1,001

‘But I am open to switching to virtual primary care.’

Despite an overwhelming preference for in-person consultations, most consumers are open to switching to virtual primary care; just **9%** say they would definitely not consider doing so.



Probably would or definitely would consider switching to a virtual primary care consultation in substitution for an in-person one

Consumers: England

Q: To what extent would you consider a virtual consultation with your general practitioner rather than a consultation in person?

Definitely and probably would consider	May or may not consider	Definitely and probably would not consider
51%	26%	23%

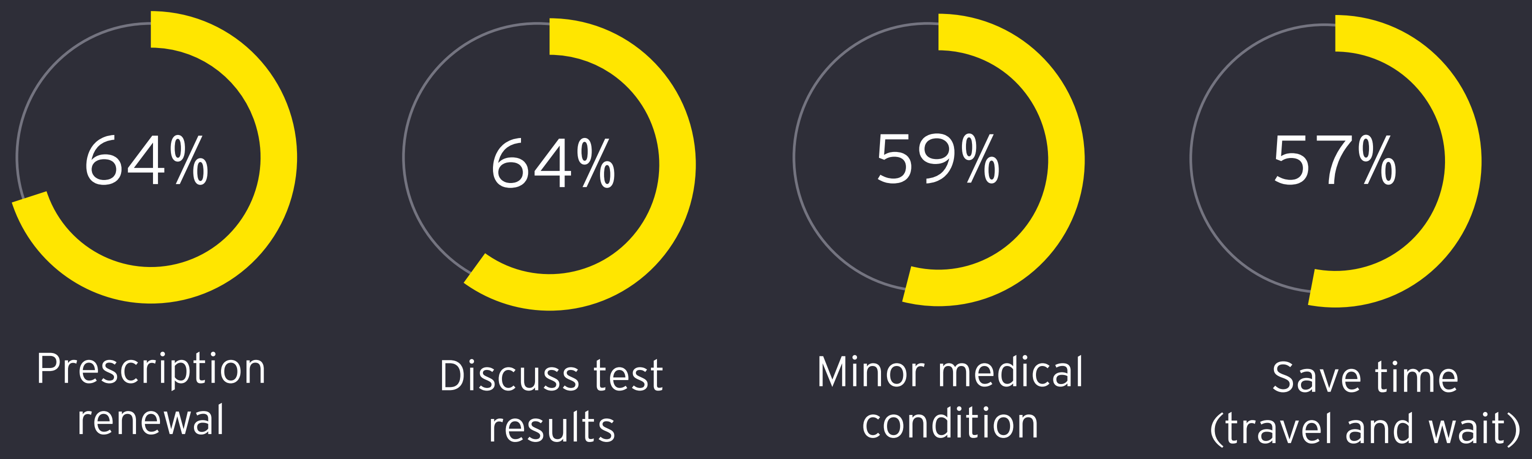
Consumers (n) = 1,001

‘I would switch to virtual consultations for minor matters or greater convenience.’

Consumers would switch to a virtual consultations for greater convenience, care for minor medical matters and completing paperwork.

Consumers: England

Q: Which of the following would make you switch from an in-person consultation to a virtual consultation with your general practitioner?



Consumers (n) = 914, excludes consumers who responded in an earlier question that they would “definitely not” use virtual care.

‘I would share certain information to get better care, but financial information is not relevant.’

Q: How willing would you be to share the following information with doctors and health professionals to help them treat you more comprehensively?

Ratings: would probably/definitely share

Consumers: England

Financial information 15%

Biometric data 79%

Grocery shopping 45%

Lifestyle choices and habits 74%

Exercise and activity patterns 56%

Genetic information 65%

Diet and nutrition 72%

Q: “Sharing this information with a doctor or health professional would definitely help me to become healthier:”

Ratings: would definitely help/help to some extent

Biometric data	89%
Lifestyle choices and habits	86%
Diet and nutrition	85%

Q: To what extent do you think sharing financial information with your doctor or health professional would help you become healthier?

Ratings: “would not make any difference”

71% say sharing financial information would not make any difference to health outcomes.

Consumers (n) = 1,001

‘I am open to technology-enhanced care for more personalized care and better health care experiences.’

Consumers are open to personalized medicines, predictive genetic testing and non-urgent care in retail locations. Using wearables and sensors to monitor health at home also appeals.

Consumers: England

Q: “To monitor and/or improve my health, I am prepared to…”

- 76%: Have non-urgent care from a health professional at a mini clinic in a department store, supermarket or pharmacy
- 71%: Take a genetic test to see if I might develop certain diseases or disorders
- 70%: Take medications made just for me (they match my genetic profile)
- 67%: Use wearable sensors to collect my health information and send to my doctor

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree”
Consumers (n) = 1,001

‘I see a big future for technology in health care over the next decade.’

Emerging technology such as precursors of the metaverse — virtual presence and artificial intelligence were met with more caution compared with more familiar technologies: **56%** agree that artificial intelligence and **47%** agree that virtual presence will become common in the next decade.

Consumers: England

Q: To what extent do you believe the following will likely occur in the health industry in the next 10 years?

Digital technologies monitor patients at home

Hospital-in-the-home will be an alternative to in-patient care

Virtual hospitals will deliver basic medical care remotely

Precision medicine will become part of primary care

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree.” Consumers (n) = 1,001

Germany findings

Me and my health care system

‘What matters most to me.’

Understanding what matters most to health care consumers and how this drives choice-making is complex.

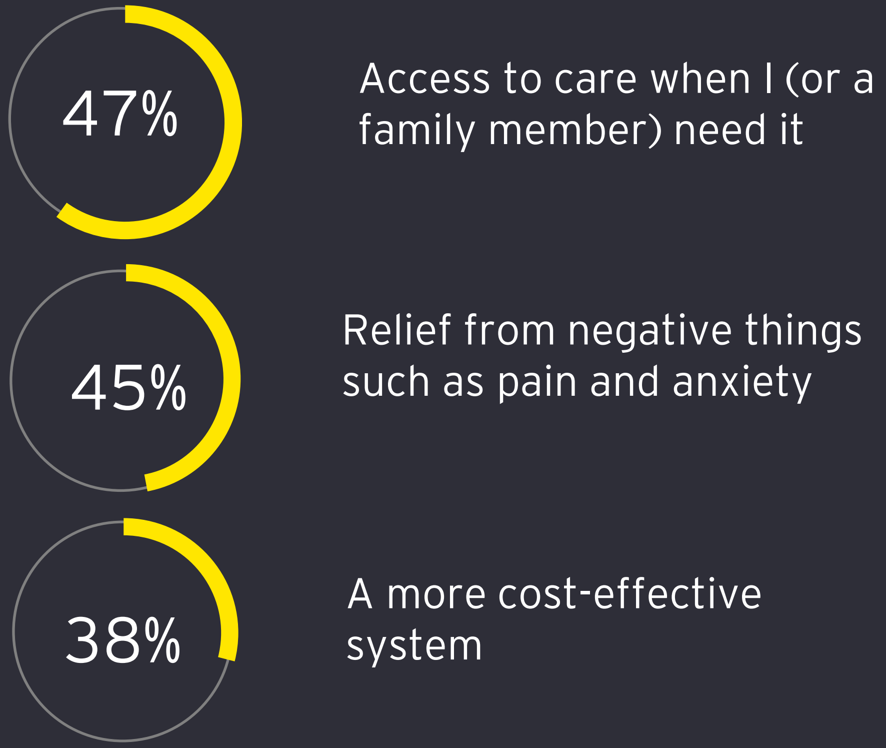
Yet this is vital intelligence as health care continues on the journey to being value-driven.

For consumers, access at the time of need is vitally important, but also highly valued is a state of healthiness and a life well lived.

Also for consumers, a health care system should deliver value through being cost-effective.

Consumers: Germany

Q: Thinking about what you value from the health care system, which of the following do you value the most?



Ordered ranking of top three preferences, shows total of top three preferences (first, second, third).

Consumers (n) = 1,000

‘Responsibility for achieving overall good health primarily rests with me.’

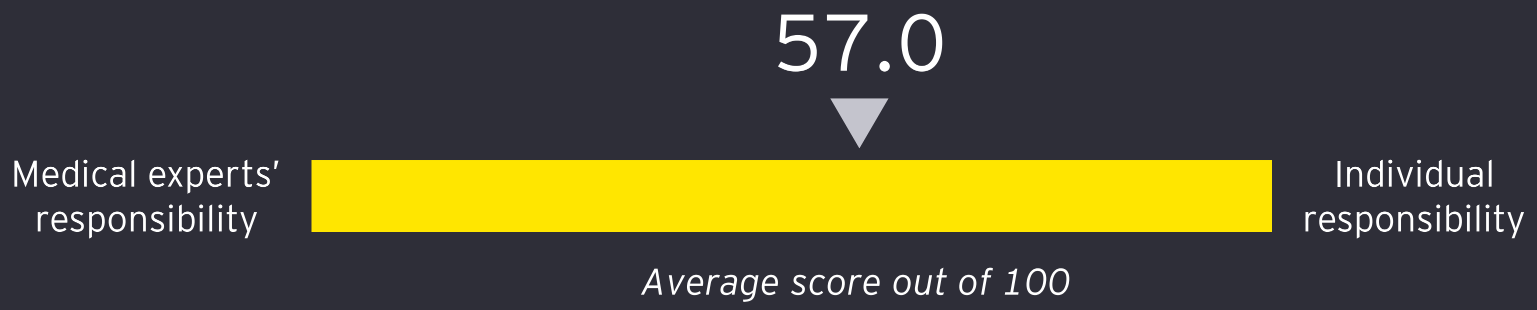
A strong sense of independence and managing oneself exists.

Responsibility for achieving overall good health lies with the individual. Few fully cede this to medical experts, but many do expect a degree of expert guidance.

Believing that they are in control and taking responsibility for their own actions further supports consumers’ active engagement in the optimal management of their health and care.

Consumers: Germany

Q: “To me, responsibility for achieving overall good health lies with ...”



Slider scale 1 to 100 with left anchor being “Medical experts who are responsible for treating people when they are ill and to also help them maintain overall good health” and right anchor being “Individuals who are responsible for managing their own lifestyle and overall good health.”

Consumers (n) = 1,000

‘Live life to the fullest … now or in the future?’

Healthiness is highly valued and this motivates people – to be healthy but also to avoid becoming unhealthy.

Priorities lie in more distant rewards arising from taking actions to secure future good health rather than living for the moment.

Consumers: Germany

Q: “When weighing up the importance of paying attention to one’s health in the present versus the future, I believe …”

Slider scale 1 to 100 with left anchor being “Paying attention to my health is important but I focus on today and don’t worry about getting sick in the future” and right anchor being “Paying attention to my health is important and I do what I can to avoid getting sick in the future.”

Consumers (n) = 1,000

‘My health care system is good, but it could be better.’

A mixed report card on the overall performance of Germany’s health system – generally well regarded but for many consumers, there is room for improvement.

The German health system does many things well. Some consumers consider it is does well in considering that mental health is as equally important as other issues, **56%** say it is above average in this aspect.

However, consumers expect:

- Improved access to care; **40%** say this is below average.
- Better customer service; **37%** say this is below average.
- Better balance in the service mix (between hospitals and primary care); **35%** say this is below average.

Consumers: Germany

Q: How would you rate the overall performance of the German health system?

56% Above Average	20% Average	24% Below Average

“Above average” is top three (5-7) ratings on a seven-point scale, where 7 is “Excellent” and “Below average” is bottom three (1-3) ratings.

Consumers (n) = 1,000

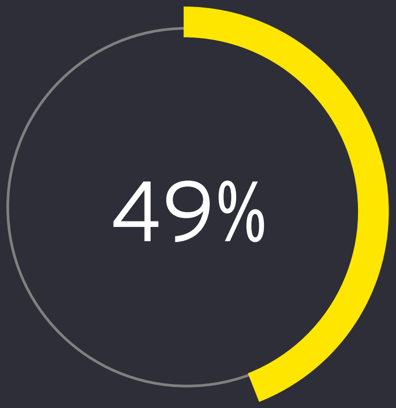
‘The experience is important to me.’

The health care experience is important to consumers, and views regarding equitable treatment are spread across the board.

Consumers: Germany

Q: How would you rate the performance of the following aspect of the health care system in Germany?

- Optimizing the human health experience for all people, no matter their race, location or personal circumstances



Consider that the health system optimizes the experience of health care regardless of race, location or personal circumstances.

Consumers (n) = 1,000

49% Above Average

26% Average

25% Below Average

“Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”; “Below Average” 1-3 ratings)

‘For me, value comes from a few key qualities of my health care system.’

Value is multidimensional.

People factors relate to the experience of health care: whether someone is treated with empathy, courtesy and respect and whether they have the opportunity to shape and make choices about their care.

Process and place factors are practical: a safe, clean environment; convenience; and up-to-date care.

Consumers (n) =864 (excludes those who have not used a health care service in the past 12 months).

Consumers: Germany

Q: Thinking about the health care services you received in the last 12 months, how would you rate your experience on the following aspects?

People factors

79%
My privacy is respected

72%
I am treated with empathy, courtesy and respect

66%
Providers are similar to me, from a similar culture, language or community

Process and place factors

81%
The care environment is safe, clean and comfortable

64%
The location is convenient, to home or office

65%
The doctor explains the care plan and my choices in a way I can understand

Showing “Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”)

Me, virtual care, and the future of health care

‘I prefer in-person consultations for most health-related things.’

Technology has made it possible to receive many medical and health services virtually, but consumers strongly prefer in-person consultations.

Consumers: Germany

Q: Please select whether a medical or health care consultation is better virtually (i.e., by phone or video) or in person (i.e., in a doctor or health professional’s office or clinic).

In-person consultation is better than a virtual consultation to:

Quality and outcome

- 84% Show a physical problem
- 82% Personal connection
- 73% Overall quality
- 71% Resolve an issue

Convenience

- 61% Overall convenience
- 54% Time spent with doctor

Utility

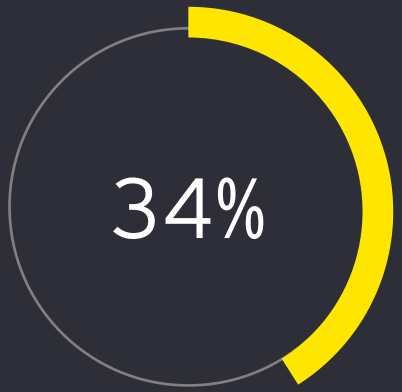
- 37% Overall cost
- 36% Wait times

Showing “In-person is better.”
A four-point scale of virtual is better; in-person is better; no difference; don’t know.

Consumers (n) = 1,000

‘But I am open to switching to virtual primary care.’

Despite an overwhelming preference for in-person consultations, most consumers are open to switching to virtual primary care; just **15%** say they would definitely not consider doing so.



Probably would or definitely would consider switching to a virtual primary care consultation in substitution for an in-person one

Consumers: Germany

Q: To what extent would you consider a virtual consultation with your general practitioner rather than a consultation in person?

Definitely and probably would consider	May or may not consider	Definitely and probably would not consider
34%	26%	40%

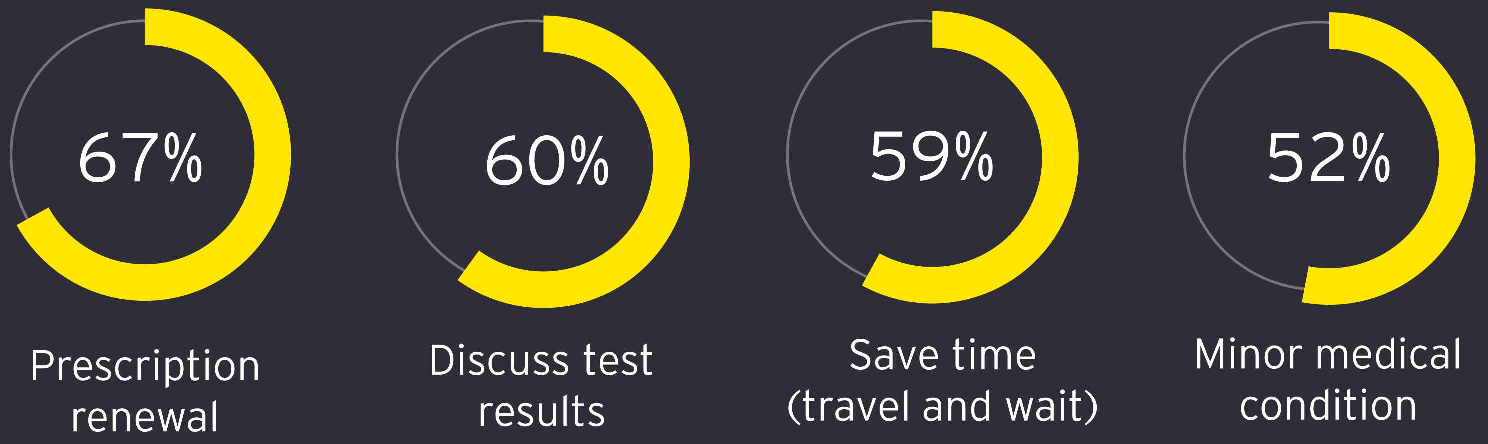
Consumers (n) = 1,000

‘I would switch to virtual consultations for minor matters or greater convenience.’

Consumers would switch to a virtual consultations for greater convenience, care for minor medical matters and completing paperwork.

Consumers: Germany

Q: Which of the following would make you switch from an in-person consultation to a virtual consultation with your general practitioner?



Consumers (n) = 847, excludes consumers who responded in an earlier question that they would “definitely not” use virtual care.

'I would share certain information to get better care, but financial information is not relevant.'

Q: How willing would you be to share the following information with doctors and health professionals to help them treat you more comprehensively?

Ratings: would probably/definitely share

Consumers: Germany

Financial information 16%

Biometric data 73%

Grocery shopping 43%

Diet and nutrition 63%

Genetic information 51%

Exercise and activity patterns 52%

Lifestyle choices and habits 60%

Q: "Sharing this information with a doctor or health professional would definitely help me to become healthier:"

Ratings: would definitely help/help to some extent

Biometric data	83%
Lifestyle choices and habits	81%
Diet and nutrition	76%

Q: To what extent do you think sharing financial information with your doctor or health professional would help you become healthier?

Ratings: would not make any difference

68% say sharing financial information would not make any difference to health outcomes.

Consumers (n) = 1,000

‘I am open to technology-enhanced care for more personalized care and better health care experiences.’

Consumers are open to personalized medicines, predictive genetic testing and non-urgent care in retail locations. Using wearables and sensors to monitor health at home also appeals.

Consumers: Germany

Q: “To monitor and/or improve my health, I am prepared to …”

- 62%: Take medications made just for me (they match my genetic profile)
- 61%: Take a genetic test to see if I might develop certain diseases or disorders
- 56%: Use wearable sensors to collect my health information and send to my doctor
- 50%: Have non-urgent care from a health professional at a mini clinic in a department store, supermarket or pharmacy

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree”

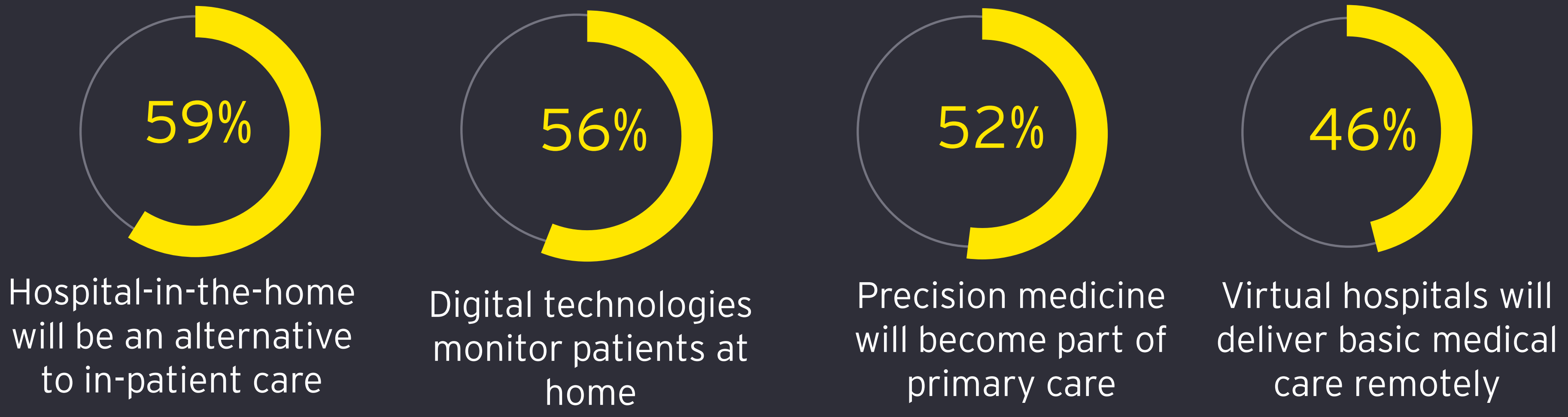
Consumers (n) = 1,000

‘I see a big future for technology in health care over the next decade.’

Emerging technology such as precursors of the metaverse – virtual presence and artificial intelligence were met with more caution compared with more familiar technologies: **41%** agree that artificial intelligence and **35%** agree that virtual presence will become common in the next decade.

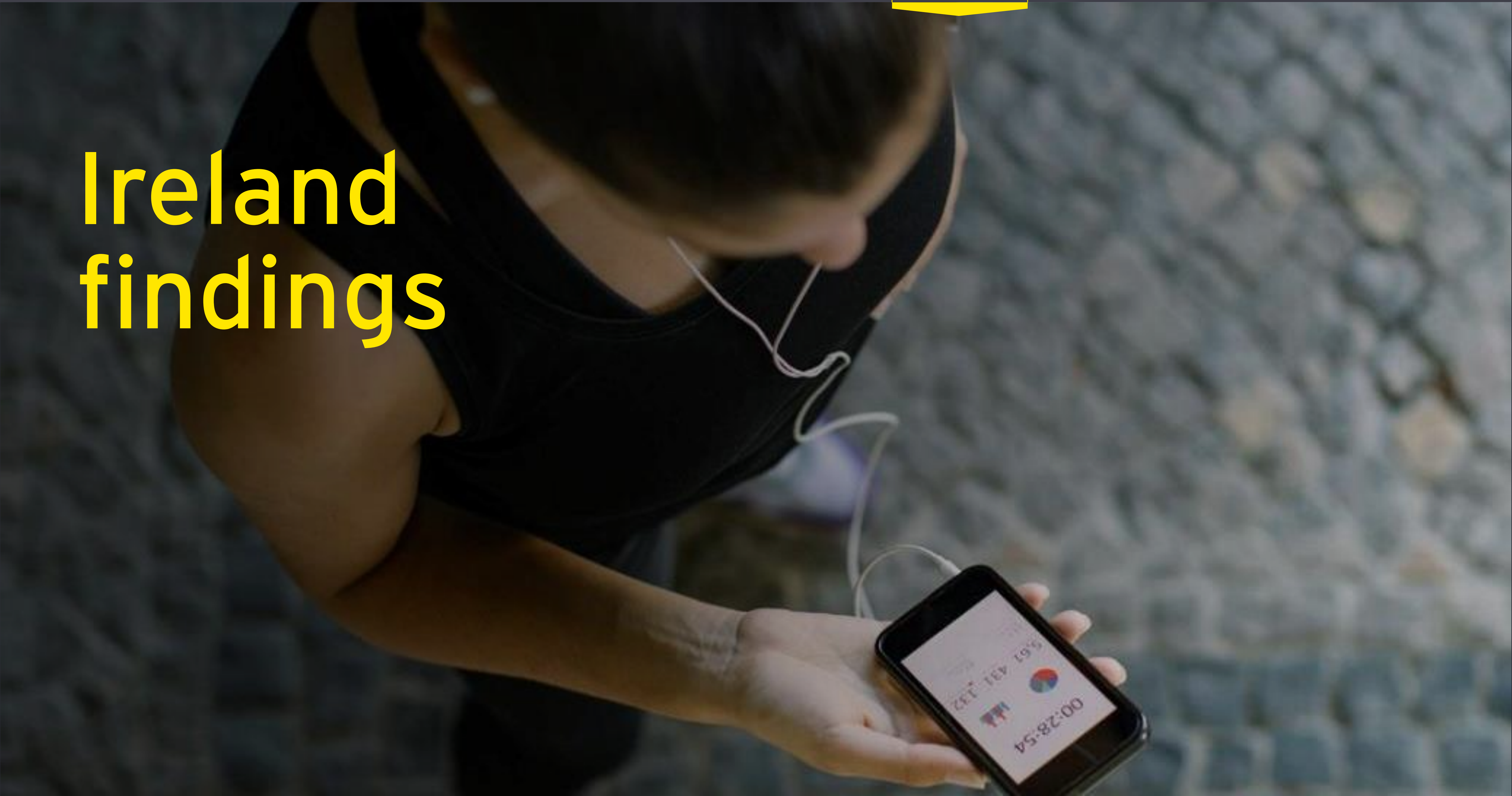
Consumers: Germany

Q: To what extent do you believe the following will likely occur in the health industry in the next 10 years?



Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree.” Consumers (n) = 1,000

Ireland findings



Me and my health care system

‘What matters most to me.’

Understanding what matters most to health care consumers and how this drives choice-making is complex.

Yet this is vital intelligence as health care continues on the journey to being value-driven.

For consumers, access at the time of need is vitally important, but also highly valued is a state of healthiness and a life well lived.

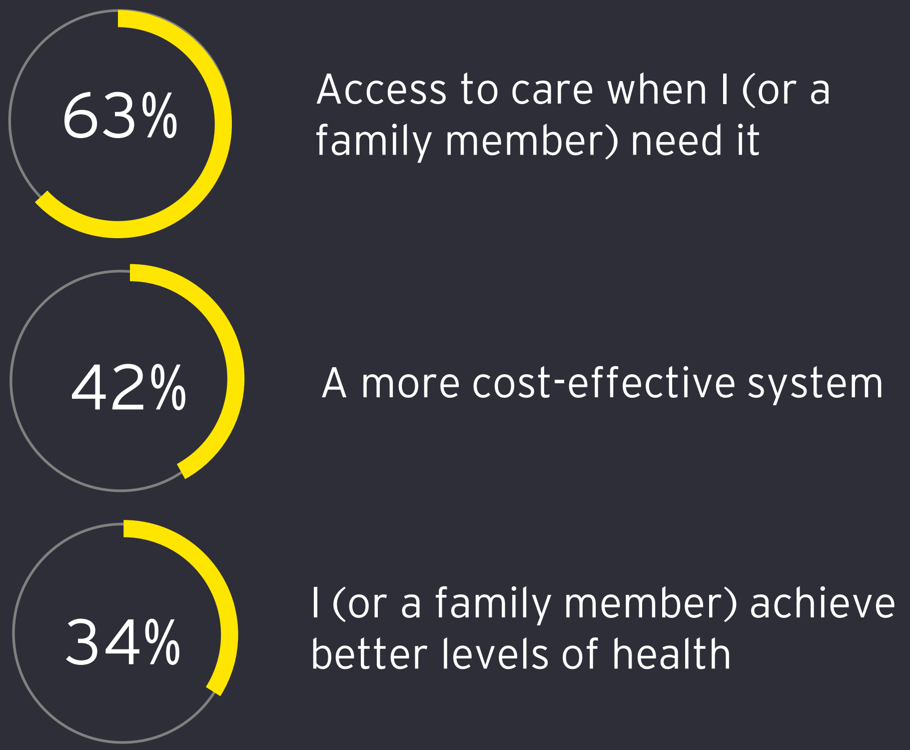
Also for consumers, a health care system should deliver value through being cost-effective.

Ordered ranking of top three preferences, shows total of top three preferences (first, second, third).

Consumers (n) = 1,016

Consumers: Ireland

Q: Thinking about what you value from the health care system, which of the following do you value the most?



‘Responsibility for achieving overall good health primarily rests with me.’

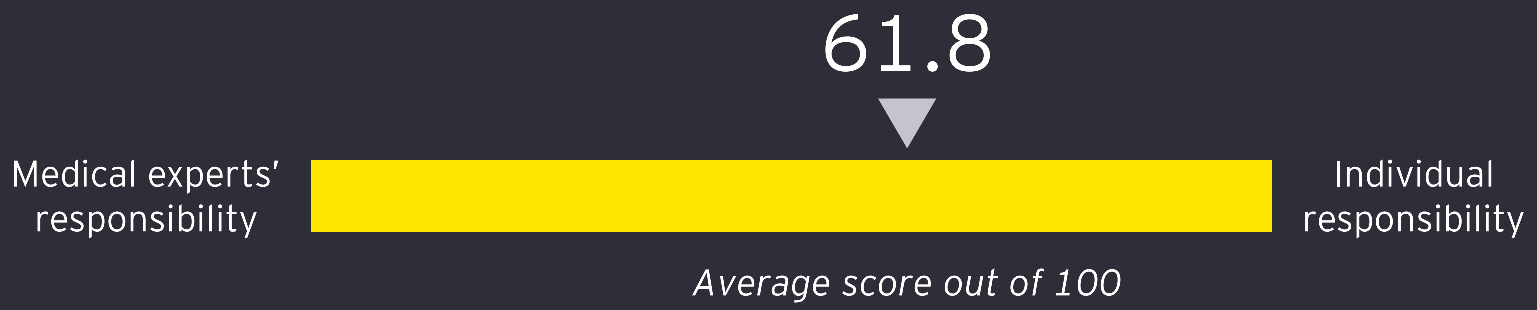
A strong sense of independence and managing oneself exists.

Responsibility for achieving overall good health lies with the individual. Few fully cede this to medical experts, but many do expect a degree of expert guidance.

Believing that they are in control and taking responsibility for their own actions further supports consumers’ active engagement in the optimal management of their health and care.

Consumers: Ireland

Q: “To me, responsibility for achieving overall good health lies with …”



Slider scale 1 to 100 with left anchor being “Medical experts who are responsible for treating people when they are ill and to also help them maintain overall good health” and right anchor being “Individuals who are responsible for managing their own lifestyle and overall good health.”

Consumers (n) = 1,016

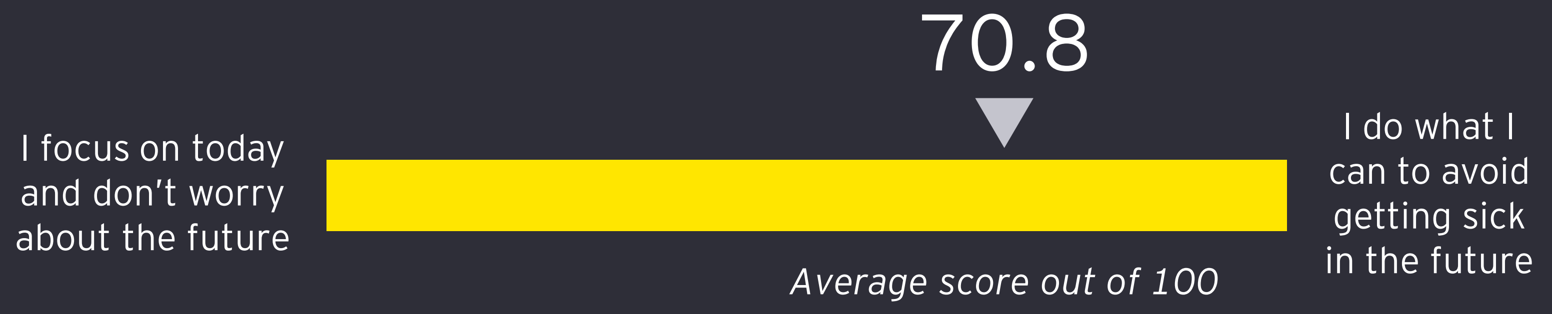
‘Live life to the fullest … now or in the future?’

Healthiness is highly valued and this motivates people – to be healthy but also to avoid becoming unhealthy.

Priorities lie in more distant rewards arising from taking actions to secure future good health rather than living for the moment.

Consumers: Ireland

Q: “When weighing up the importance of paying attention to one’s health in the present versus the future, I believe …”



Slider scale 1 to 100 with left anchor being “Paying attention to my health is important but I focus on today and don’t worry about getting sick in the future” and right anchor being “Paying attention to my health is important and I do what I can to avoid getting sick in the future.”

Consumers (n) = 1,016

‘My health care system is good, but it could be better.’

A mixed report card on the overall performance of Ireland’s health system – generally well regarded but for many consumers, there is room for improvement.

The Irish health system does many things well. Some consumers consider it is does well in customer service, **36%** say it is above average in this aspect.

However, consumers expect:

- Improved access to care; **57%** say this is below average.
- Value for money spent; **55%** say this is below average.
- Better balance in the service mix (between hospitals and primary care); **49%** say this is below average.

Consumers: Ireland

Q: How would you rate the overall performance of the Irish health system?

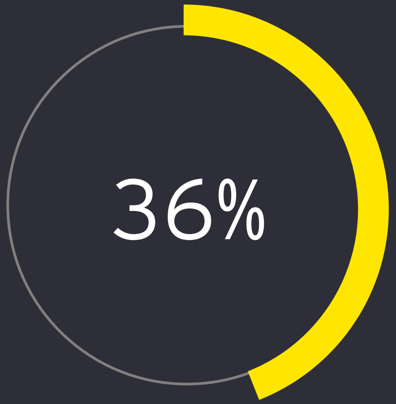
37%	20%	43%
Above Average	Average	Below Average

“Above average” is top three (5-7) ratings on a seven-point scale, where 7 is “Excellent” and “Below average” is bottom three (1-3) ratings.

Consumers (n) = 1016

‘The experience is important to me.’

The health care experience is important to consumers, and views regarding equitable treatment are spread across the board.



Consider that the health system optimizes the experience of health care regardless of race, location or personal circumstances.

Consumers (n) = 1,016

Consumers: Ireland

Q: How would you rate the performance of the following aspect of the health care system in Ireland?

- Optimizing the human health experience for all people, no matter their race, location or personal circumstances

36% Above Average	23% Average	41% Below Average

“Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”; “Below Average” 1-3 ratings)

‘For me, value comes from a few key qualities of my health care system.’

Value is multidimensional.

People factors relate to the experience of health care: whether someone is treated with empathy, courtesy and respect and whether they have the opportunity to shape and make choices about their care.

Process and place factors are practical: a safe, clean environment; convenience; and up-to-date care.

Consumers (n) =866 (excludes those who have not used a health care service in the past 12 months).

Consumers: Ireland

Q: Thinking about the health care services you received in the last 12 months, how would you rate your experience on the following aspects?

People factors

80%
My privacy is respected

72%
I am treated with empathy, courtesy and respect

64%
My feelings of wellbeing improve

Process and place factors

71%
The care environment is safe, clean and comfortable

68%
The doctor explains the care plan and my choices in a way I can understand

66%
The doctor is up to date with modern treatments and offers these to patients.

Showing “Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”)

Me, virtual care, and the future of health care

‘I prefer in-person consultations for most health-related things.’

Technology has made it possible to receive many medical and health services virtually, but consumers strongly prefer in-person consultations.

Consumers: Ireland

Q: Please select whether a medical or health care consultation is better virtually (i.e., by phone or video) or in person (i.e., in a doctor or health professional’s office or clinic).

In-person consultation is better than a virtual consultation to:

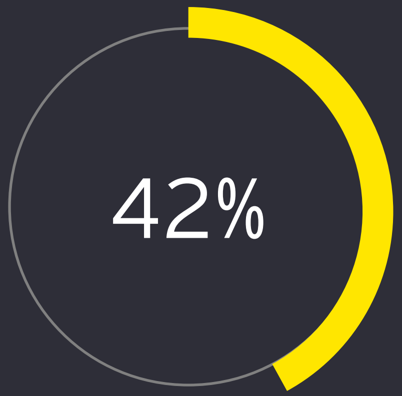
Quality and outcome	85%	Show a physical problem
	80%	Personal connection
	75%	Overall quality
	70%	Resolve an issue
Convenience	63%	Time spent with doctor
	53%	Overall convenience
Utility	39%	Overall cost
	34%	Wait times

Showing “In-person is better.”
A four-point scale of virtual is better; in-person is better; no difference; don’t know.

Consumers (n) = 1,016

‘But I am open to switching to virtual primary care.’

Despite an overwhelming preference for in-person consultations, most consumers are open to switching to virtual primary care; just **10%** say they would definitely not consider doing so.



Probably would or definitely would consider switching to a virtual primary care consultation in substitution for an in-person one

Consumers: Ireland

Q: To what extent would you consider a virtual consultation with your general practitioner rather than a consultation in person?

Definitely and probably would consider	May or may not consider	Definitely and probably would not consider
42%	28%	30%

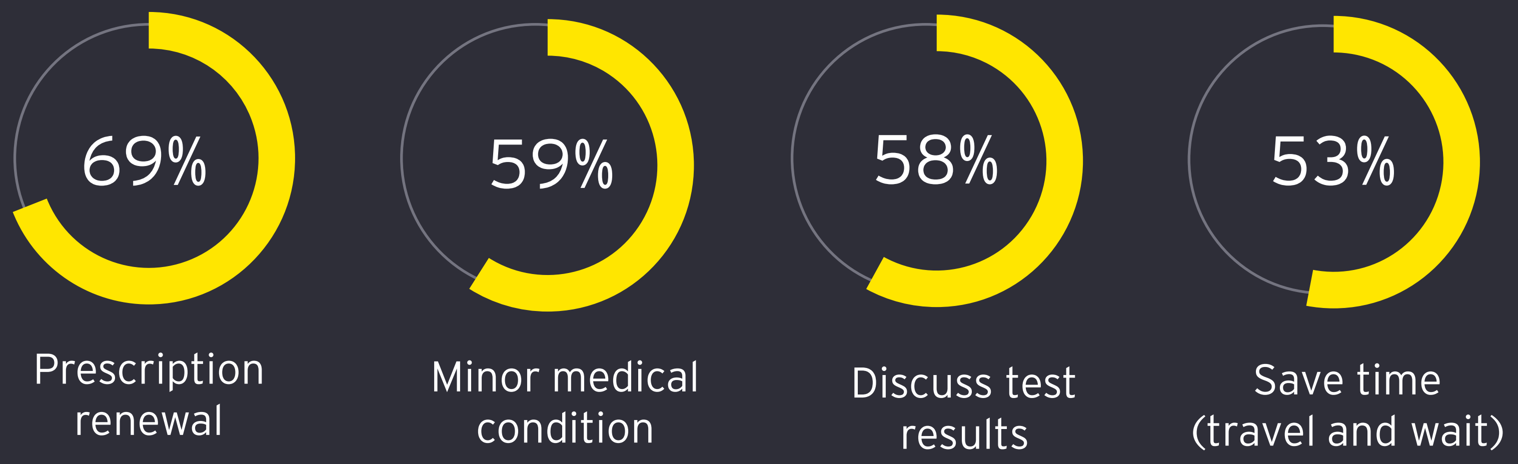
Consumers (n) = 1,016

‘I would switch to virtual consultations for minor matters or greater convenience.’

Consumers would switch to a virtual consultations for greater convenience, care for minor medical matters and completing paperwork.

Consumers: Ireland

Q: Which of the following would make you switch from an in-person consultation to a virtual consultation with your general practitioner?



Consumers (n) = 912, excludes consumers who responded in an earlier question that they would “definitely not” use virtual care.

‘I would share certain information to get better care, but financial information is not relevant.’

Q: How willing would you be to share the following information with doctors and health professionals to help them treat you more comprehensively?

Ratings: would probably/definitely share

Consumers: Ireland

Financial information 19%

Biometric data 78%

Grocery shopping 51%

Lifestyle choices and habits 75%

Exercise and activity patterns 64%

Genetic information 67%

Diet and nutrition 74%

Q: “Sharing this information with a doctor or health professional would definitely help me to become healthier:”

Ratings: would definitely help/help to some extent

Biometric data	90%
Lifestyle choices and habits	89%
Diet and nutrition	88%

Q: To what extent do you think sharing financial information with your doctor or health professional would help you become healthier?

Ratings: would not make any difference

65% say sharing financial information would not make any difference to health outcomes.

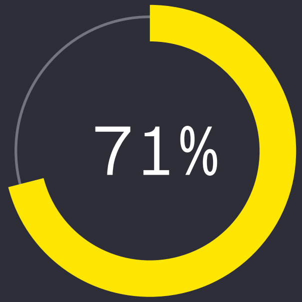
Consumers (n) = 1,016

‘I am open to technology-enhanced care for more personalized care and better health care experiences.’

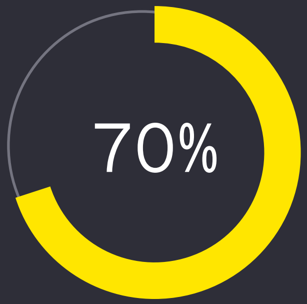
Consumers are open to personalized medicines, predictive genetic testing and non-urgent care in retail locations. Using wearables and sensors to monitor health at home also appeals.

Consumers: Ireland

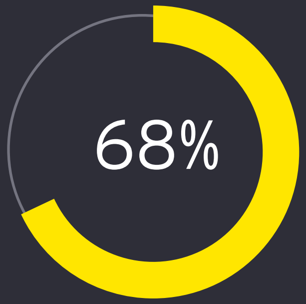
Q: “To monitor and/or improve my health, I am prepared to …”



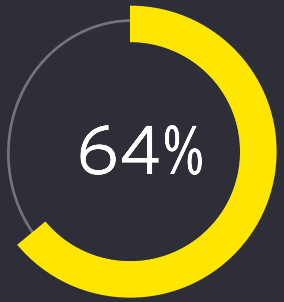
Take a genetic test to see if I might develop certain diseases or disorders



Use wearable sensors to collect my health information and send to my doctor



Have non-urgent care from a health professional at a mini clinic in a department store, supermarket or pharmacy



Take medications made just for me (they match my genetic profile)

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree”

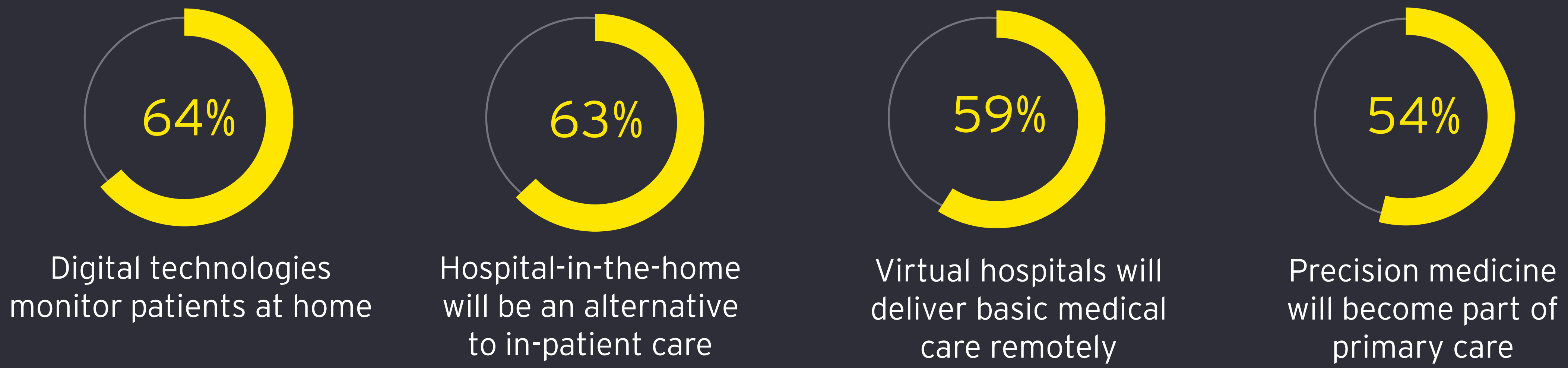
Consumers (n) = 1,016

‘I see a big future for technology in health care over the next decade.’

Emerging technology such as precursors of the metaverse – virtual presence and artificial intelligence were met with more caution compared with more familiar technologies: **48%** agree that artificial intelligence and **40%** agree that virtual presence will become common in the next decade.

Consumers: Ireland

Q: To what extent do you believe the following will likely occur in the health industry in the next 10 years?



Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree.” Consumers (n) = 1,016

United States findings

Me and my health care system

‘What matters most to me.’

Understanding what matters most to health care consumers and how this drives choice-making is complex.

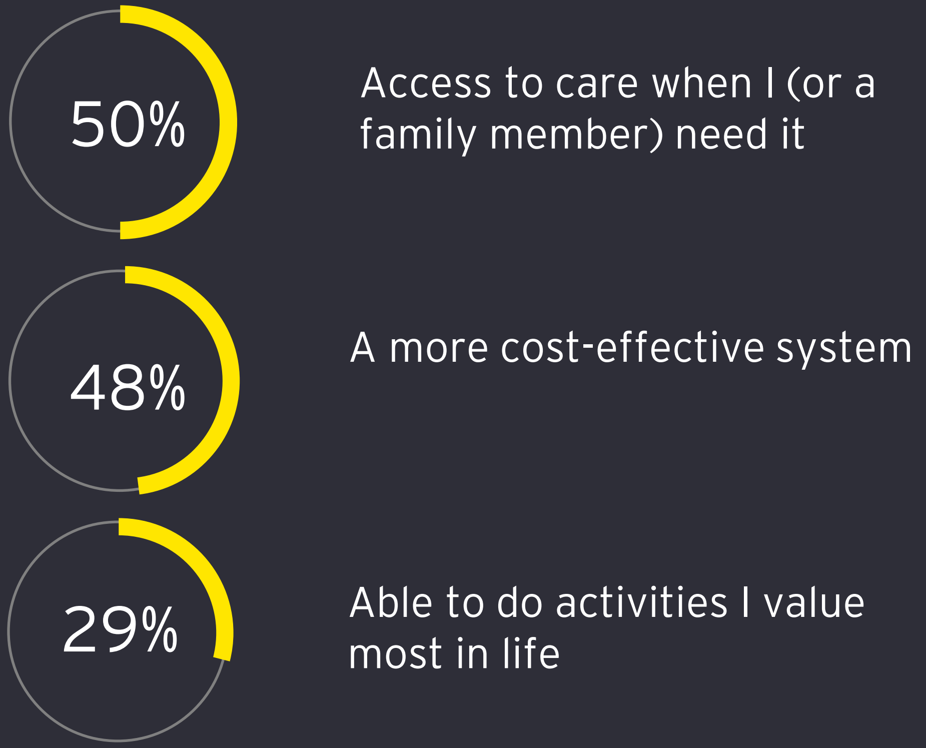
Yet this is vital intelligence as health care continues on the journey to being value-driven.

For consumers, access at the time of need is vitally important, but also highly valued is a state of healthiness and a life well lived.

Also for consumers, a health care system should deliver value through being cost-effective.

Consumers: United States

Q: Thinking about what you value from the health care system, which of the following do you value the most?



Ordered ranking of top three preferences, shows total of top three preferences (first, second, third).

Consumers (n) = 1,000

‘Responsibility for achieving overall good health primarily rests with me.’

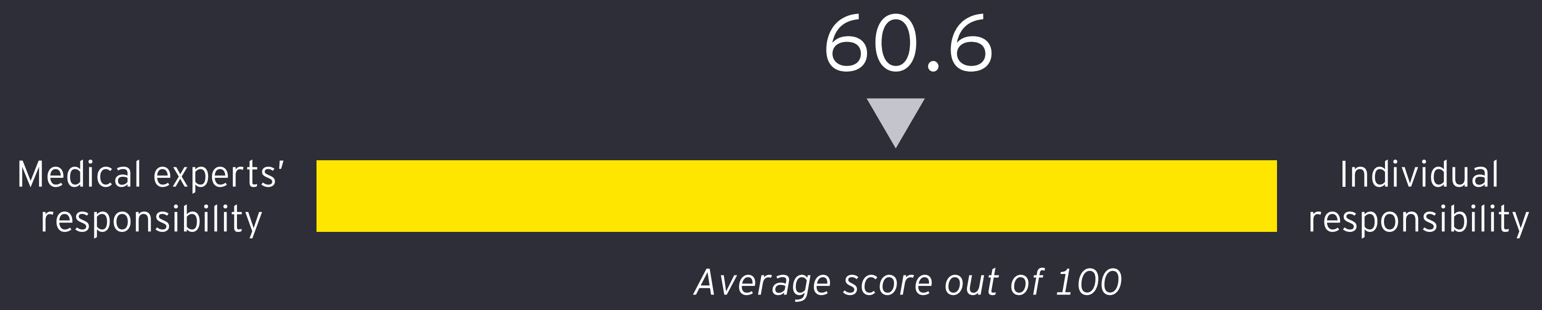
A strong sense of independence and managing oneself exists.

Responsibility for achieving overall good health lies with the individual. Few fully cede this to medical experts, but many do expect a degree of expert guidance.

Believing that they are in control and taking responsibility for their own actions further supports consumers’ active engagement in the optimal management of their health and care.

Consumers: United States

Q: “To me, responsibility for achieving overall good health lies with ...”



Slider scale 1 to 100 with left anchor being “Medical experts who are responsible for treating people when they are ill and to also help them maintain overall good health” and right anchor being “Individuals who are responsible for managing their own lifestyle and overall good health.”

Consumers (n) = 1,000

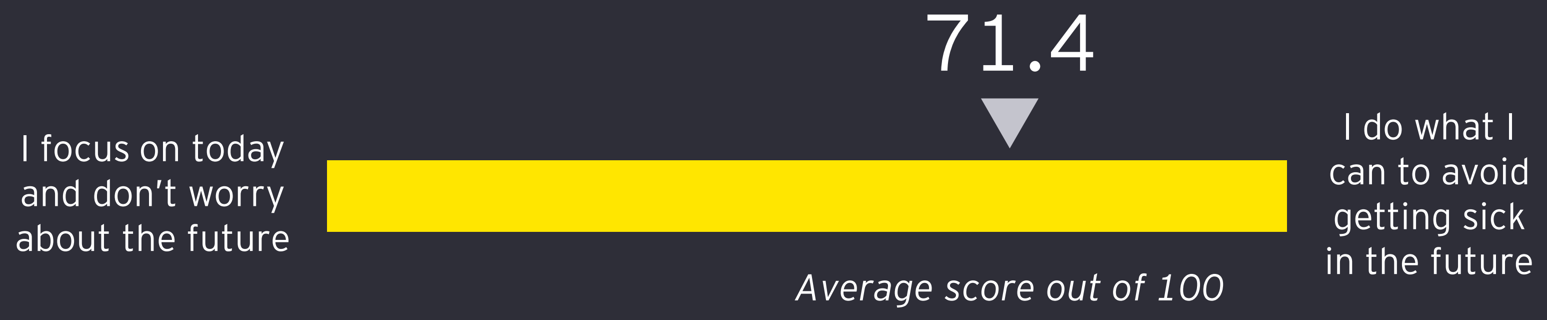
‘Live life to the fullest … now or in the future?’

Healthiness is highly valued and this motivates people – to be healthy but also to avoid becoming unhealthy.

Priorities lie in more distant rewards arising from taking actions to secure future good health rather than living for the moment.

Consumers: United States

Q: “When weighing up the importance of paying attention to one’s health in the present versus the future, I believe …”



Slider scale 1 to 100 with left anchor being “Paying attention to my health is important but I focus on today and don’t worry about getting sick in the future” and right anchor being “Paying attention to my health is important and I do what I can to avoid getting sick in the future.”

Consumers (n) = 1,000

‘My health care system is good, but it could be better.’

A mixed report card on the overall performance of the US health system – generally well regarded but for many consumers, there is room for improvement.

The US health care system does many things well. Consumers consider it is highly technologically advanced; **56%** say it is above average in this aspect.

However, consumers expect:

- Better value for money spent overall; **45%** say this is below average.
- Improved access to care; **32%** say this is below average.
- Environmental sustainability; **32%** say this is below average.

Consumers: United States

Q: How would you rate the overall performance of the US health care system?

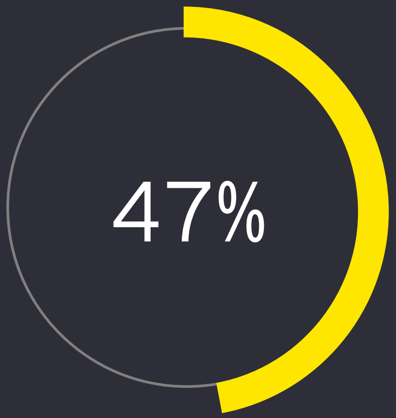
48%	22%	30%
Above Average	Average	Below Average

“Above average” is top three (5-7) ratings on a seven-point scale, where 7 is “Excellent” and “Below average” is bottom three (1-3) ratings.

Consumers (n) = 1,000

‘The experience is important to me.’

The health care experience is important to consumers, and views regarding equitable treatment are spread across the board.



Consider that health systems optimize the experience of health care regardless of race, location or personal circumstances.

Consumers (n) = 1,000

Consumers: United States

Q: How would you rate the performance of the following aspect of the health care system in the US?

- Optimizing the human health experience for all people, no matter their race, location or personal circumstances

47% Above Average	22% Average	31% Below Average

“Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”; “Below Average” 1-3 ratings)

‘For me, value comes from a few key qualities of my health care system.’

Value is multidimensional.

People factors relate to the experience of health care: whether someone is treated with empathy, courtesy and respect and whether they have the opportunity to shape and make choices about their care.

Process and place factors are practical: a safe, clean environment; convenience; and up-to-date care.

Consumers (n) =831 (excludes those who have not used a health care service in the past 12 months).

Consumers: United States

Q: Thinking about the health care services you received in the last 12 months, how would you rate your experience on the following aspects?

People factors

79%
My privacy is respected

72%
I have a say in my care and can be actively involved in the care process

72%
I am treated with empathy, courtesy and respect

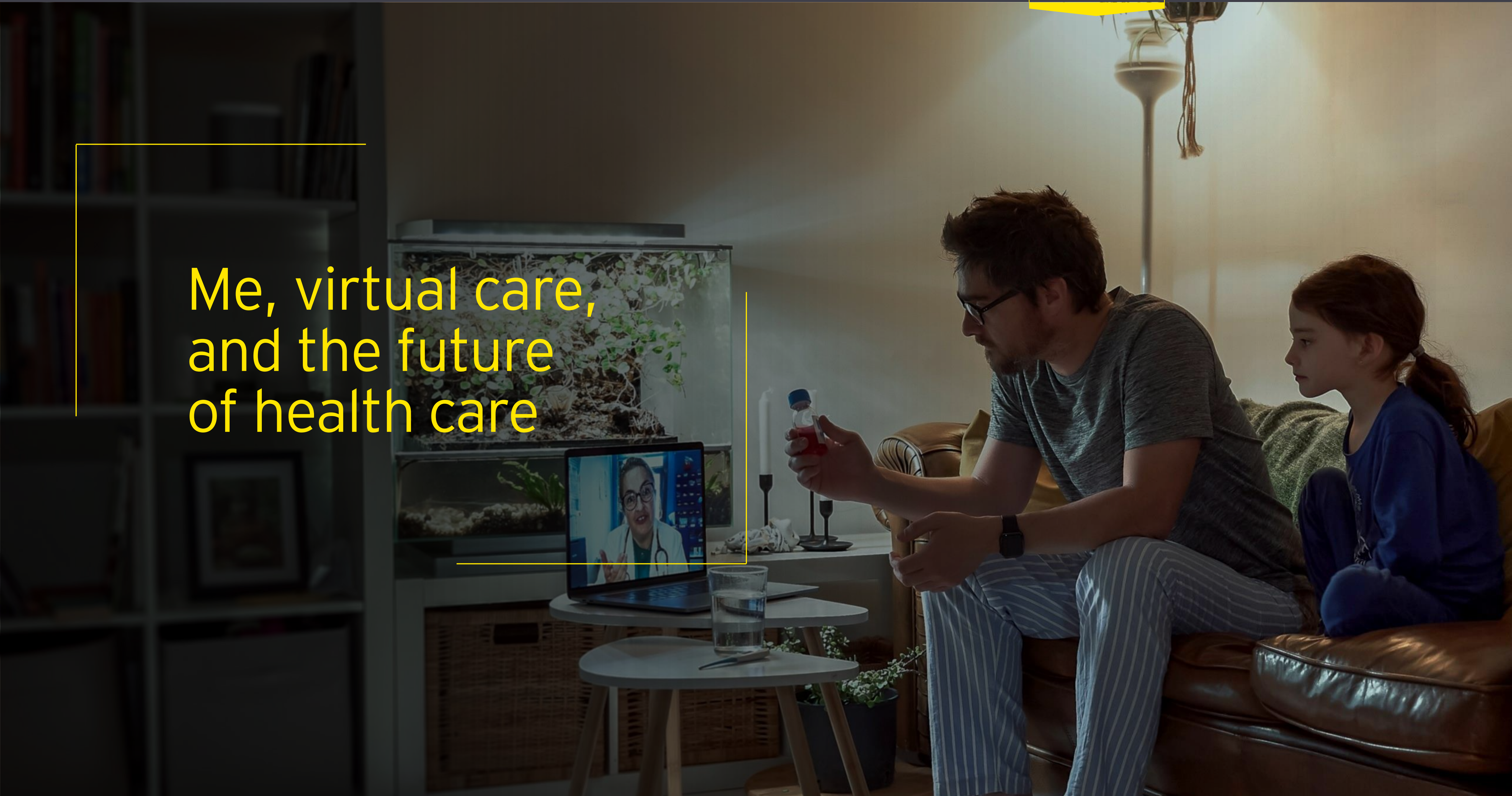
Process and place factors

75%
The care environment is safe, clean and comfortable

72%
There is convenient parking

71%
The doctor or health professional is up to date with modern treatments and technologies, and offers them

Showing “Above Average” (5-7 ratings on a seven-point scale where 7 is “Excellent”)



Me, virtual care, and the future of health care

‘I prefer in-person consultations for most health-related things.’

Technology has made it possible to receive many medical and health services virtually, but consumers strongly prefer in-person consultations.

Consumers: United States

Q: Please select whether a medical or health care consultation is better virtually (i.e., by phone or video) or in person (i.e., in a doctor or health professional’s office or clinic).

In-person consultation is better than a virtual consultation to:

Quality and outcome

- 80% Show a physical problem
- 72% Personal connection
- 67% Overall quality
- 64% Resolve an issue

Convenience

- 54% Time spent with doctor
- 43% Overall convenience

Utility

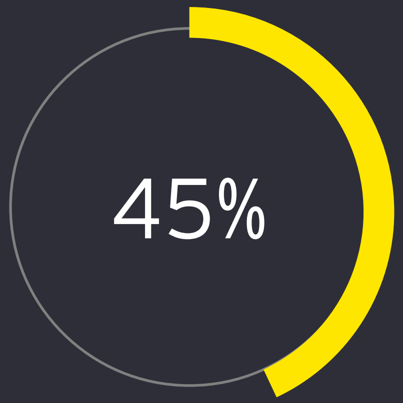
- 34% Overall cost
- 33% Wait times

Showing “In-person is better.”
A four-point scale of virtual is better; in-person is better; no difference; don’t know.

Consumers (n) = 1,000

‘But I am open to switching to virtual primary care.’

Despite an overwhelming preference for in-person consultations, most consumers are open to switching to virtual primary care; just **10%** say they would definitely not consider doing so.



Probably would or definitely would consider switching to a virtual primary care consultation in substitution for an in-person one

Consumers: United States

Q: To what extent would you consider a virtual consultation with your primary care practitioner rather than a consultation in person?

Definitely and probably would consider	May or may not consider	Definitely and probably would not consider
45%	32%	23%

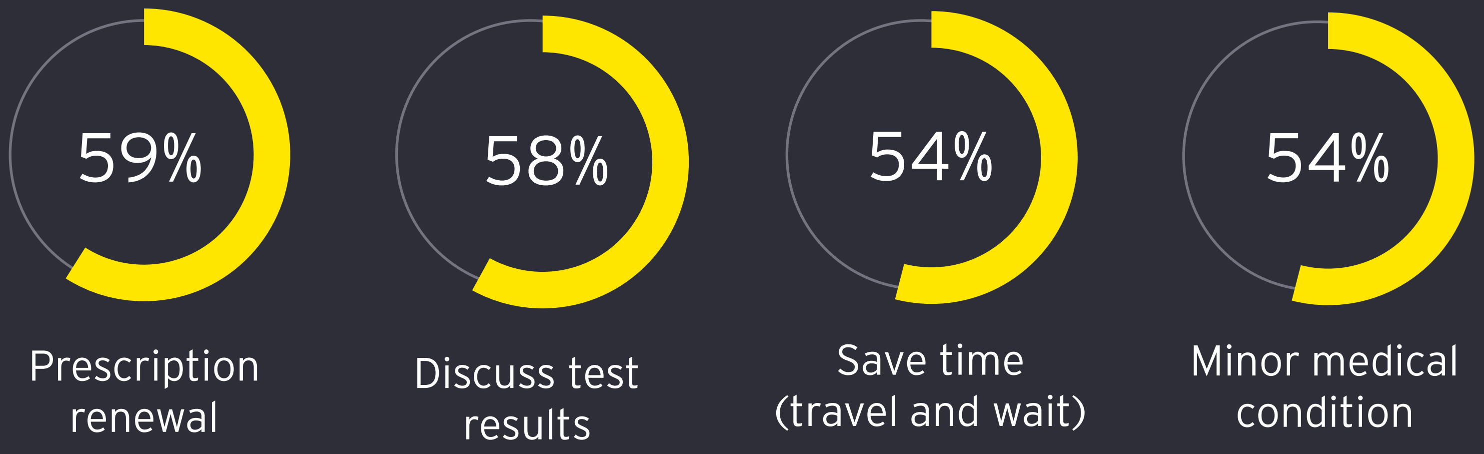
Consumers (n) = 1,000

‘I would switch to virtual consultations for minor matters or greater convenience.’

Consumers would switch to a virtual consultations for greater convenience, care for minor medical matters and completing paperwork.

Consumers: United States

Q: Which of the following would make you switch from an in-person consultation to a virtual consultation with your primary care practitioner?



Consumers (n) = 905, excludes consumers who responded in an earlier question that they would “definitely not” use virtual care.

‘I would share certain information to get better care, but financial information is not relevant.’

Q: How willing would you be to share the following information with doctors and health professionals to help them treat you more comprehensively?

Ratings: would probably/definitely share

Consumers: United States

Financial information 24%

Biometric data 74%

Grocery shopping 51%

Diet and nutrition 70%

Genetic information 61%

Lifestyle choices and habits 68%

Exercise and activity patterns 62%

Q: “Sharing this information with a doctor or health professional would definitely help me to become healthier:”

Ratings: would definitely help/help to some extent

Biometric data	88%
Lifestyle choices and habits	85%
Diet and nutrition	85%

Q: To what extent do you think sharing financial information with your doctor or health professional would help you become healthier?

Ratings: would not make any difference

56% say sharing financial information would not make any difference to health outcomes.

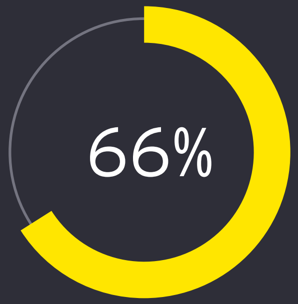
Consumers (n) = 1,000

‘I am open to technology-enhanced care for more personalized care and better health care experiences.’

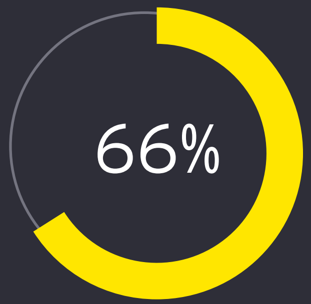
Consumers are open to personalized medicines, predictive genetic testing and non-urgent care in retail locations. Using wearables and sensors to monitor health at home also appeals.

Consumers: United States

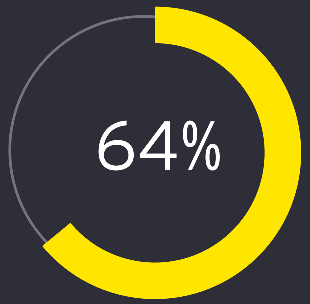
Q: “To monitor and/or improve my health, I am prepared to …”



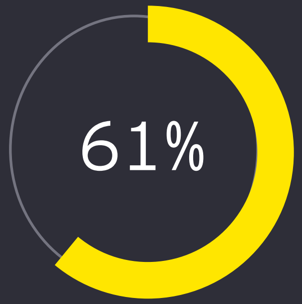
Take a genetic test to see if I might develop certain diseases or disorders



Have non-urgent care from a health professional at a mini clinic in a department store, supermarket or pharmacy



Take medications made just for me (they match my genetic profile)



Use wearable sensors and mobile apps to collect my health information and send it to my doctor to help treat me

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree”

Consumers (n) = 1,000

‘I see a big future for technology in health care over the next decade.’

Emerging technology such as precursors of the metaverse – virtual presence and artificial intelligence were met with more caution compared with more familiar technologies: **54%** agree that artificial intelligence and **51%** agree that virtual presence will become common in the next decade.

Consumers: United States

Q: To what extent do you believe the following will likely occur in the health industry in the next 10 years?

Digital technologies monitor patients at home

Hospital-in-the-home will be an alternative to in-patient care

Virtual hospitals will deliver basic medical care remotely

Precision medicine will become part of primary care

Ratings: Top three (5-7) ratings on a seven-point scale, where 7 is “Strongly Agree.” Consumers (n) = 1,000

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Key Contacts | EY Global Consumer Health Survey 2023

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About EY's Global Health Sector
Across the world, health care systems and entities are under unprecedented pressure. Spiraling costs, exacerbated by aging populations and emerging market growth, are bringing newfound focus on value and outcomes. Mobile health and data analytics promise to revamp care delivery but are also bringing in competitors from other sectors. For governments, payers and providers, these trends create a host of challenges: extracting insights from "big data," partnering in new ways, boosting operating efficiencies and more.

EY's Global Health Sector brings together a worldwide network of more than 10,000 sector-focused assurance, consulting, strategy, tax and transaction professionals with a range of health care and business backgrounds. Our wide-reaching network allows us to rapidly share leading practices and solutions around the globe and deploy diverse delivery teams to meet your needs. ey.com/health

EYG no. 005101-23Gbl
2304-4222779
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