

MIND THE GAP: ARE DIGITAL HEALTH SOLUTIONS REALLY PATIENT CENTRIC?

Daniela Anselmi Associate Director

Is telemedicine beneficial for all healthcare conditions, or could this be a good time for pharma to revisit the patient journey and address any gaps?

The pandemic impacted global healthcare systems in a multitude of ways. One area that saw dramatic change was in the digitalisation of healthcare, which suddenly began to accelerate at an extraordinary pace with higher demand for telemedicine services and digital solutions, such as online booking systems, consultations and prescription services. Over the course of the pandemic, use of these services has steadily increased and, although social distancing rules have now relaxed, many of these practices remain.

One of the arguments in favour of the increased use of digital health solutions has been patient preference. According to the Deloitte Center for Health Solutions, interviews held with technology executives and leaders of healthcare systems evidenced the belief that digital transformation initiatives are mainly consumer-centric, with 92% of respondents stating that better consumer satisfaction and engagement are top goals of their digital investments. But is this actually the case? Is telemedicine beneficial for all healthcare conditions, or could this be a good time for pharma to revisit the patient journey and address any satisfaction gaps that may be developing?

Global market research was recently conducted to understand the impact COVID-19 was having on patient management. Interestingly, the research was conducted both during and after the height of the pandemic and included patients, HCPs, nurses and carers, so we were able to collect a range of perspectives in each different scenario. The disease is one that often carries with it a social stigma, which means the patient's healthcare experience is particularly critical. Unfortunately, what we found was that respondents had many concerns regarding the increased use of digital health solutions.

Patient anxiety

For this set of patients, the rapid adoption of telemedicine during the pandemic was one of the major changes they experienced in their healthcare journeys. And although they recognised the benefits of remote consultations, including the reduced time commitment versus their regular face-to-face consultations, many expressed a dislike of them. They felt less comfortable discussing their condition in the locations they were dialling in from because of a lack of privacy. Because the virtual consultation was shorter than in-person, many also feared things may have been missed and many wondered if there was a risk the HCP might be missing visual signs of new symptoms or disease progression.

Disruption to diagnosis

Beyond remote consultations, the study revealed the pandemic also had an adverse effect on various stages throughout the patient journey including presentation, diagnosis and ongoing management. At the height of the pandemic, diagnosis and monitoring tests were, for the most part, carried out using remote home testing kits with the results shared either via an automated text message or in a remote consultation. HCPs reported that this led to a reduction in the number of patients getting tested due to concerns surrounding the delivery of home testing kits to their home addresses. Only patients that



were unconcerned with the social stigma surrounding their conditions felt comfortable ordering a test. For those patients already receiving treatment, and who felt comfortable using home testing kits to manage their conditions, many reportedly missed the opportunity to go to a hospital to interact with HCPs and other patients. Our research found that the opportunity to feel a sense of community in the hospital waiting room is important for those living with a stigmatising condition, who otherwise tend to feel isolated or even rejected.

Sensitive scenarios

A poll was conducted with 90 healthcare professionals (HCPs) across Europe to understand perceptions and the use of digital health solutions more broadly. All HCPs involved specialised in the treatment of conditions that are often considered 'taboo', including oncologists and infectious disease specialists in France, Germany, Italy, Spain and the UK.

The findings were mixed. Although almost half of HCPs agree that digital solutions can help improve patient management, over half of HCPs (57%) are not certain that patients themselves are satisfied with the use of digital health solutions. Findings suggest that, although HCPs believe these services are intended to improve patient management, they are also aware of the unintended consequences. In fact, there is a certain level of agreement that these services are creating new problems: 42% of HCPs strongly agree that digital health solutions are generating new gaps and/or unmet needs among patients.

So what does this all mean for the pharmaceutical industry? The research findings show that, in the past two years, HCPs' use of digital services has undoubtedly increased, especially for: remote consultations (66% of HCPs reporting increase), online repeat prescriptions (60%), online booking consultations (49%), remote triage questionnaires (39%) and home testing services (33%), and that perhaps this is a trend that is set to continue. Yet, as a result, gaps in patient satisfaction also seem to be appearing. It seems that digital technology and evolving patient expectations may be pushing the pharmaceutical industry into uncharted territory.

Pharma brands may need to revisit their understanding of the patient journey post-pandemic. Market research will give them the required insights to ensure that newly developed digital solutions and services are keeping the patient at the forefront, especially if they employ a methodology that includes all key stakeholders involved in care delivery and attempts to mimic the real world as closely as possible.

Given rising costs and the stress on many global healthcare systems, change in how healthcare services are delivered seems inevitable. But hopefully with the right adjustments made to the way technology is used, it will continue to be of benefit to patients.

To find out more please contact:
daniela.anselmi@researchpartnership.com