

‘The doctor will Zoom you now’ – the impact of care at a distance on patient experience

Speakers:

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DIGITAL CONSULTATIONS IN HEALTHCARE



SKIM

decision behavior experts

Poll 1: do you agree with the statement: “After the pandemic, care will be more digital than before Covid-19”?

YES

NO

NOT SURE



1

Go to **www.sli.do** on your phone

2

Enter code SKIM

3

Type your answers!

Do you agree with the statement: “After the pandemic, care will be more digital than before Covid-19”?

slido



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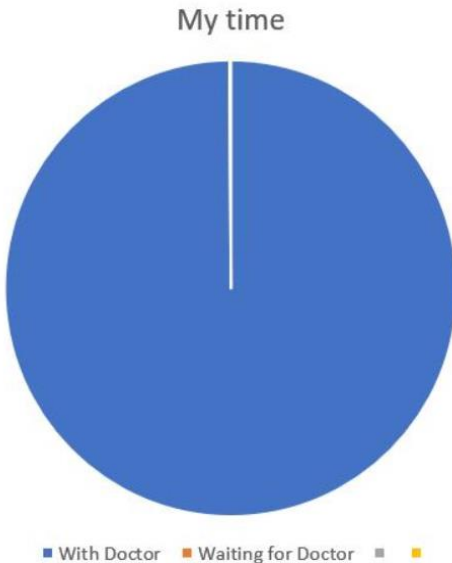
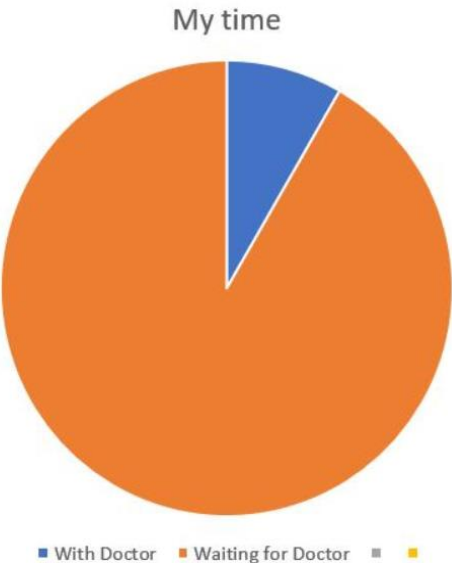
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Type your answers!

 Start presenting to display the poll results on this slide.

On a personal note...

My Time at Doctor's Appointment Traditional vs. Zoom



Highlighting two trends:

1

Digitalization of the industry:

Adding digital to patient consultations and marketing communications

2

Increased expectations for pharmaceutical companies:

Having to deliver value beyond 'just' effective medication



COVID-19 impacts both of these trends



Defining Telehealth

“delivery of health care services, where patients and providers are separated by distance...

... it is particularly valuable for those in remote areas, vulnerable groups and ageing populations”



<https://www.who.int/gho/goe/telehealth/en/>

If Telehealth is here to stay, what do we need to know?

- 1
- 2
- 3
- 4



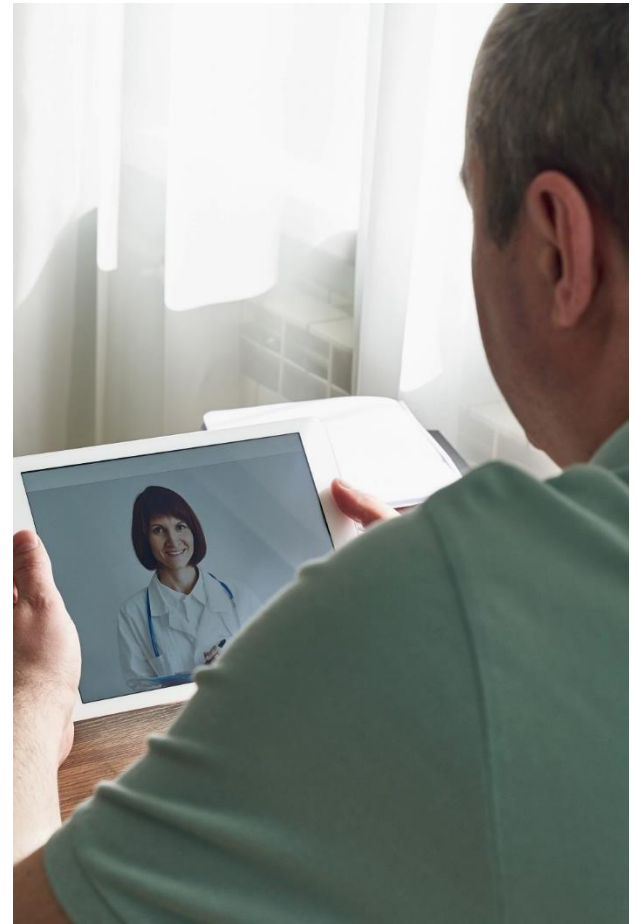
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1 What impact does Telehealth have on the patient- HCP interaction?

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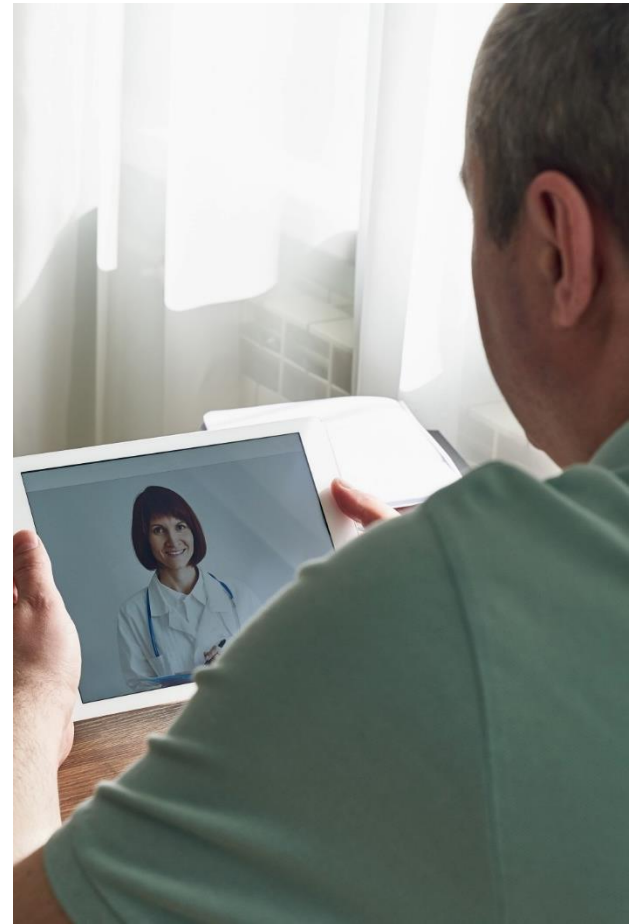
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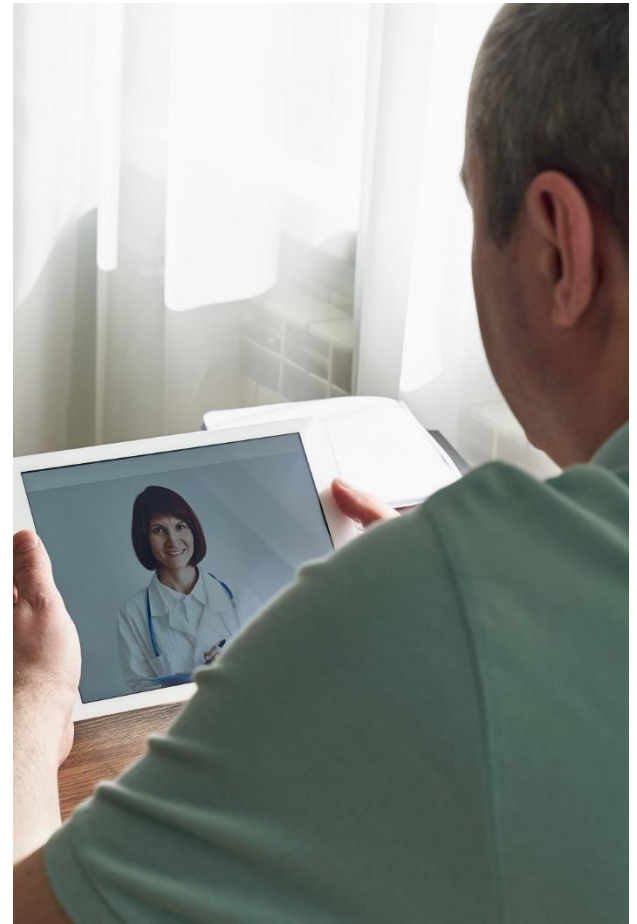
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3 How can we ensure that the quality of care remains at the standard patients deserve?

4



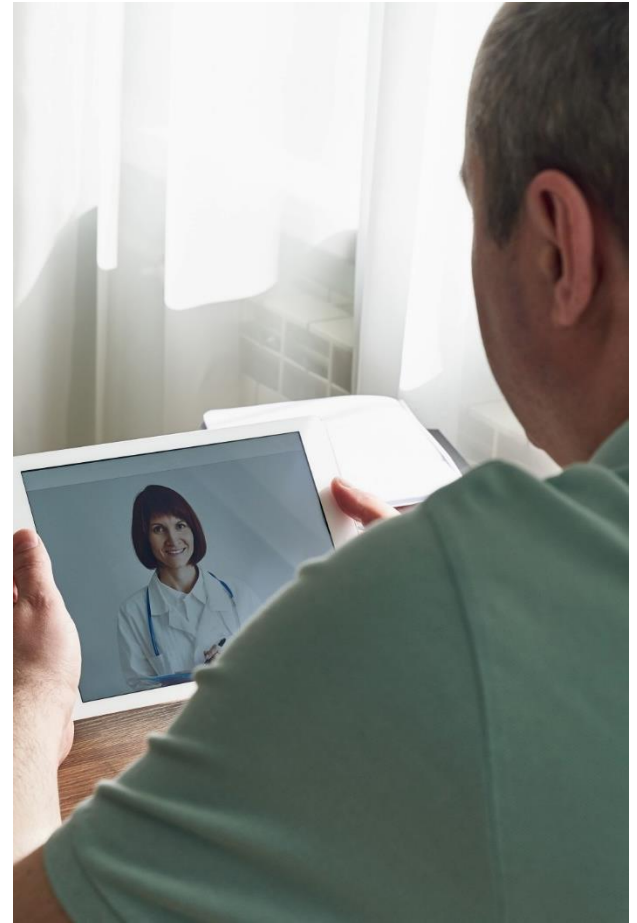
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3 How can we ensure that the quality of care remains at the standard patients deserve?

4 And how can pharma support?



Our study set up

Online survey

EU5 + US & NL

France, UK, Germany, Italy, Spain,
The Netherlands & the United States

4 patient types:

Oncology

Diabetics

Chronic lung condition

Chronic heart condition

All seen a **shift to more digital/distant care**



Our study set up

We investigated:

- Quality of care
- Benefits & drawbacks of distant care
- Satisfaction & willingness to continue using
- Telehealth
- Longevity of change



Poll 2: What % of patients had a positive experience receiving Telehealth during COVID-19 lockdown?

0-25 %

26-50 %

51-75 %

76-100 %



1

Go to **www.sli.do** on your phone

2

Enter code **SKIM**

3

Type your answers!

slido

What % of patients had a positive experience with Telehealth during the Covid-19 lockdown period?

 Start presenting to display the poll results on this slide.

Poll 3: Based on this overwhelmingly positive experience, what % of patients would you expect to be willing to continue receiving care the way they did during COVID-19?

0-25 %

26-50 %

51-75 %

76-100 %



1

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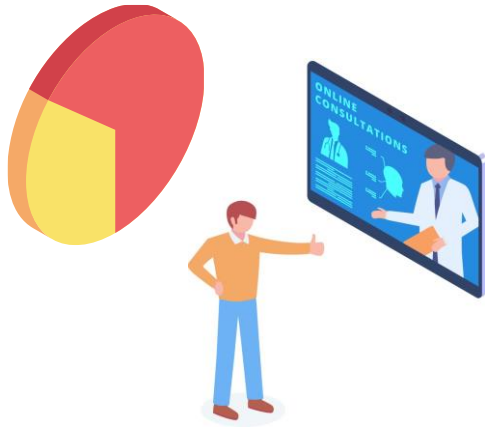


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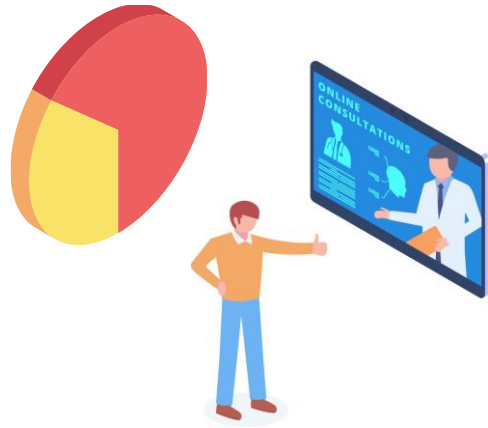
Based on this overwhelmingly positive experience, what % of patients do you expect to be willing to continue receiving care the way they did during Covid-19?

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Across markets, only 46 of all patients is willing to continue receiving their care at a distance



Across markets, only 46 of all patients is willing to continue receiving their care at a distance



Not even a quarter thinks the shift to Telehealth & distant care is permanent



What drives the unwillingness to continue using Telehealth?

Telehealth is
impersonal



75%

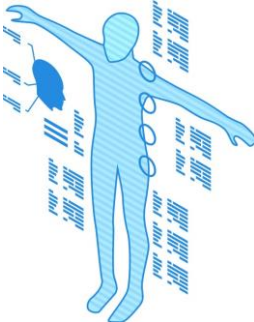
What drives the unwillingness to continue using Telehealth?

Telehealth is impersonal



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Doubt HCP's ability to determine physical health



53%

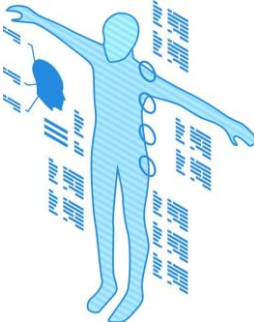
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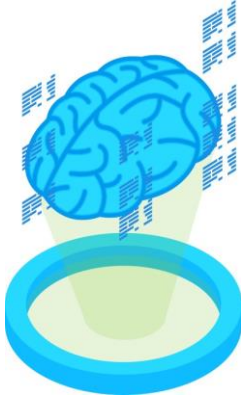
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Doubt HCP's ability to determine physical health



53%

Mental health needs not met



31%

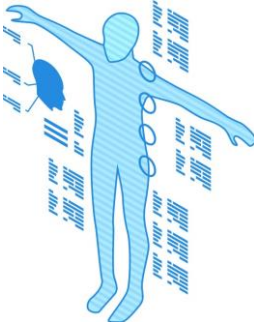
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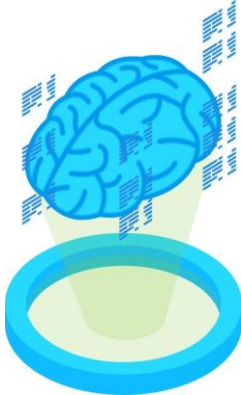
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Less say in treatment choice



37%

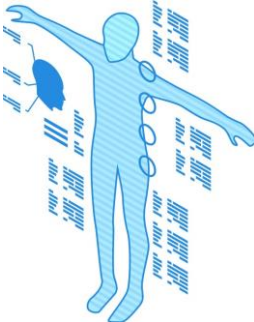
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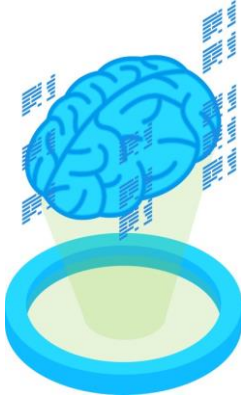
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Privacy concerns



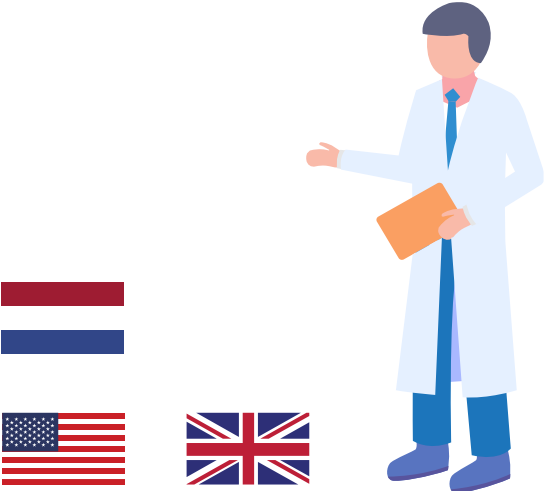
38%

Difference between market experiences of the shift in care

Shift in care in The Netherlands, UK, and the US

Before COVID-19

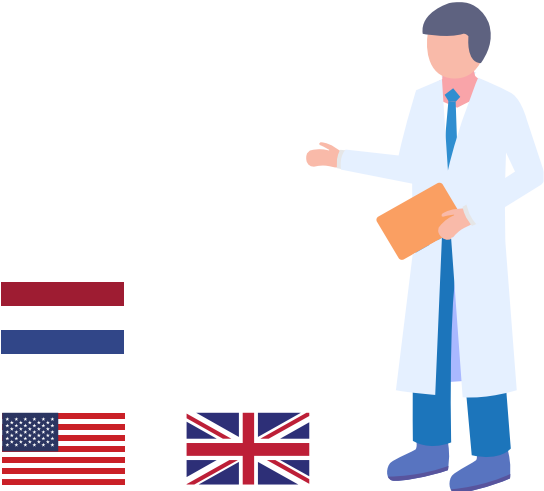
Around 70% had only had face to face interactions with their HCP pre-COVID-19



Shift in care in The Netherlands, UK, and the US

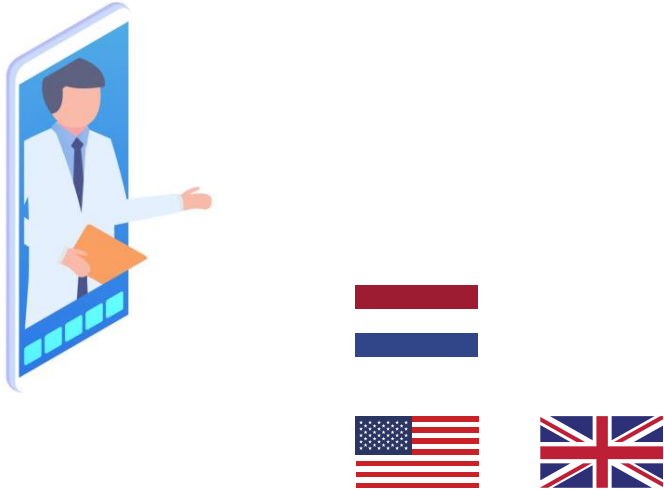
Before COVID-19

Around 70% had only had face to face interactions with their HCP pre-COVID-19



During COVID-19

Majority only had virtual consultations and no face-to-face contact



Shift in care in Germany, France, Italy and Spain

Before COVID-19

More than 40% already connected digitally with their HCP at times



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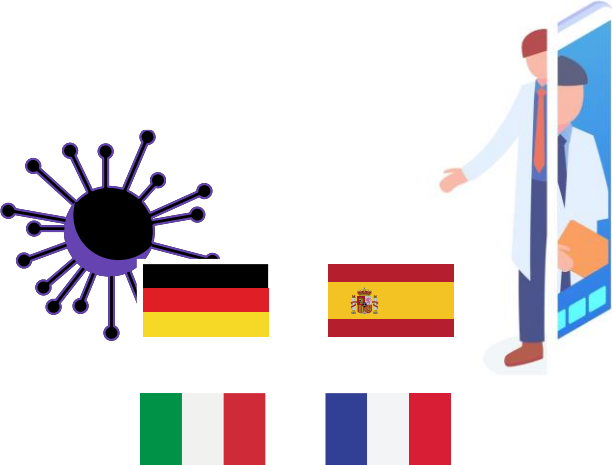
Majority of patients still saw their HCP at least for half of their consults



Less likely to continue with abrupt switch to Telehealth

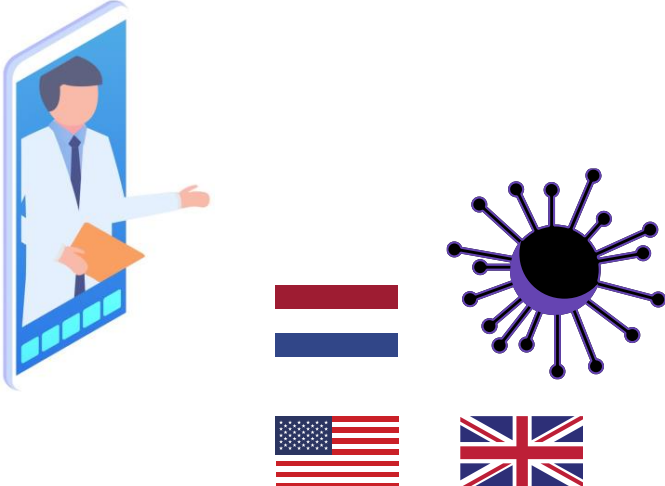
Germany, Italy, Spain & France

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Netherlands, US & UK

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The method makes the experience



Phone



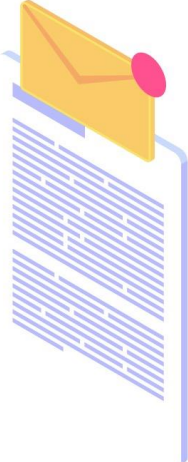
Video call



Text message



Multimedia message



E-mail



App

The Dutch and the Italian experience



Video-calling to interact with HCP



Currently using



Like to use



Currently using



Like to use





60% of patients relied more on getting information on their physical health from online sources

An iceberg floating in blue water. The tip of the iceberg is above the water line, and the much larger base is submerged below. The water surface is indicated by a white scalloped line.

**Short-term:
Pleasant first experience**

**Long-term:
Expectation to return to
'the way it was before'**

**Long-term:
Real barriers positive
evaluation of Telehealth**

Opportunities in key industry trends

1

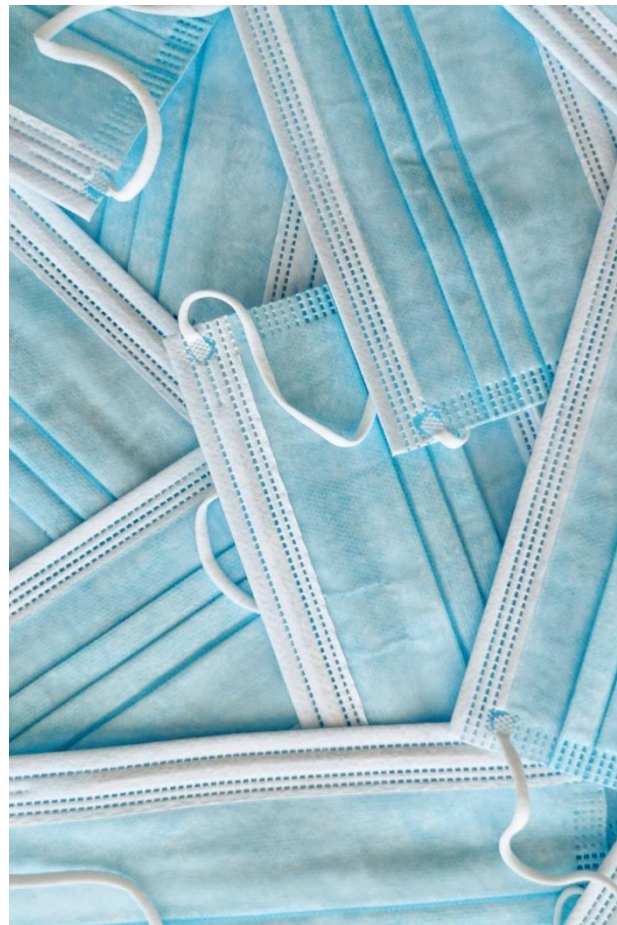
Digitalization of the industry:

The full industry is pushed to be digital

2

Increased expectations for pharmaceutical companies:

Space to support in the transition to digital care



**Keep the patient at the center
or risk sub-optimal patient outcomes**

**A too swift pull to a sub-optimal care system
jeopardizes patient outcomes**

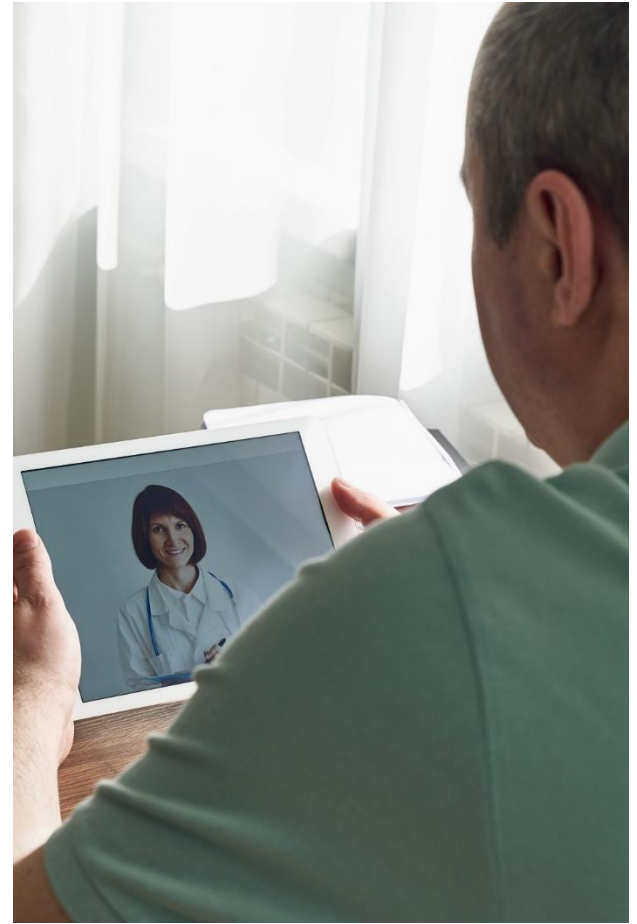
**In designing a Telehealth system, the patient
needs to be front & center to ensure care fits
the patient**



If Telehealth is here to stay, what do we need to know?

1 Revisit the patient journey:

How has Telehealth impacted this? What unmet needs have emerged?



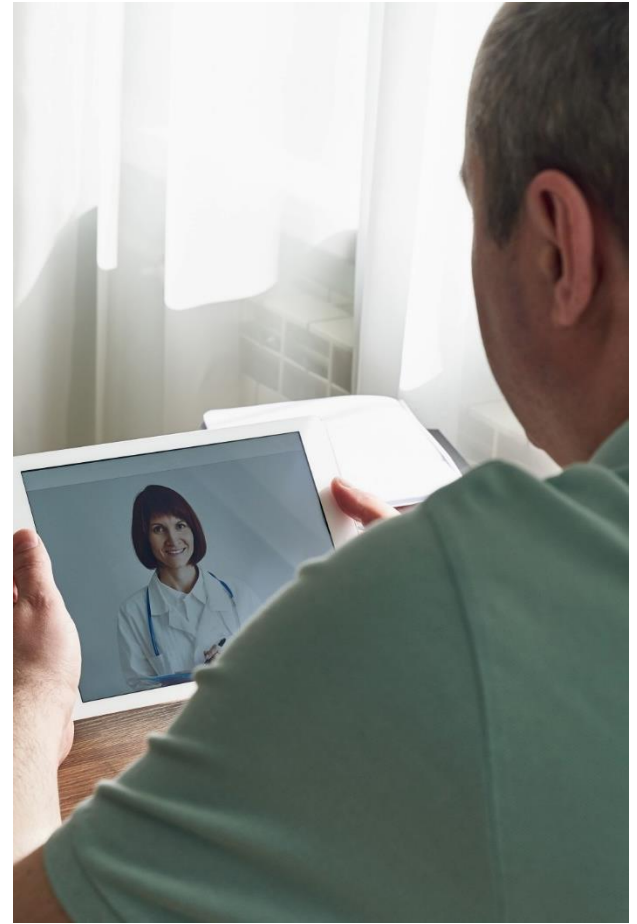
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2 Help educate physicians

Add value by empowering HCPs to deliver the best possible distant care

3 Optimize online information for patients

Review available information to ensure it meets patients needs



Closing slide

Do you want to know more?
Reach out to us for more insight into
specific country or indication area
specifics!



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Janneke van den Bent

Manager

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Our Speakers



Janneke van den Bent

After completing her BSc. in Cultural Anthropology, Janneke realised she wanted to complement her interest in human nature and behaviour with business savviness, which drove her to pursue a Master's degree in Business Administration. Within qualitative market research, Janneke feels she has found the perfect intersection between her interest in human behaviour and her drive to create tangible results. She joined the SKIM team in July of 2017 and has since been involved in various qualitative research projects, both within and outside of the Healthcare industry. With time, she's come to understand that her heart lies in understanding and supporting patients in their patient journey.

Bill Salokar



Bill Salokar serves as Vice President, Client Solutions at SKIM where he builds relationships with clients in the healthcare, technology, consumer, and durable goods. For over 30 years, he has used his training as a statistician to help clients understand customer decisions and develop marketing strategies. His current interests include eCommerce, research innovations and behavioral economics. Bill balances critical thinking and problem solving with a sense of fun, imagination, and rather dry sense of humor. He is currently the Treasurer and Secretary for Intellus Worldwide.

Thank you

Questions?