A PwC survey into consumer attitudes towards healthcare in the Middle East

Care Anywhere
Moving health and wellness out of the hospital into the hands of the consumer

67%
Of survey respondents across the Middle East are willing to receive healthcare in a non-traditional setting.

68%
Have a health-related app on their mobile or smart device.

57%
Have had a doctor's consultation that is not face-to-face in an office or hospital.

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Foreword

Can an Uber-like upheaval happen in healthcare? Could an Airbnb-like model become the future for health systems?

These companies own no assets – Uber is not a transportation carrier or logistics provider and AirBnB is not an owner or operator of hotel or holiday properties. Both are technology companies - online platforms that connect people with a service on-demand.

So what might this look like for healthcare?

The days of healthcare being provided solely in the hospital are over. Today's health challenges are simply beyond the control of health systems that were built to solve a completely different set of healthcare needs.

People are living longer and governments are facing the growing burden of long-term chronic disease combined with ever-increasing costs for treatment. In addition, life-style related diseases are escalating; heart disease is the number one cause of death across the Middle East, obesity is prevalent across all demographics, and there is an alarming increase in type-2 diabetes among the young.

These health issues are impacting a wide range of economic and functional aspects of the Middle East's economy. And while oil prices are beginning to climb from a low of $27 a barrel in February 2016 – albeit slowly – there is the growing realisation that lower oil and gas prices are here to stay. In a region where up to between 65%-95% of government revenues come from oil and gas, this will have a profound impact on the developing healthcare systems.

This new economic reality is a call-to-arms for governments and the private sector across the Middle East to re-evaluate how healthcare is provided to its citizens.

The bulk of healthcare investment continues to be in constructing new hospitals, with these buildings as the primary destination for care. This has been the historic status quo for healthcare across the globe, yet this status quo is no longer an option.

Across all demographics, people in the Middle East are among the most tech-savvy in the world. The explosion of technology – digitally enabled, wireless connectivity across increasingly mobile devices – is bringing about breakthroughs that are erasing healthcare boundaries and enabling care anywhere. Harnessing this technology can provide consumers with the data and information they need to manage their own health and wellness, and to make better, more informed decisions in partnership with their healthcare providers.

The Middle East has a unique opportunity to lead the world in developing a healthcare system that is truly responsive to what people want and need. Governments across the region have a strong desire to innovate, new entrants are combining mobile, digital and wireless technologies with data-driven 'smart' solutions, and the demand from patients and the public for care anywhere is already here.

Introduction

In January 2016, we asked YouGov Research to conduct a survey across the UAE, the Kingdom of Saudi Arabia and Qatar to understand three things:

- If and how people are using healthcare, wellness and fitness applications on their computers, smartphones or tablets to manage their health and wellness needs;
- If there was an appetite for receiving healthcare services in non-traditional settings, such as a retail store or mobile healthcare unit; and,
- If the technology were available, what services they would access at home via their mobile/smartphone devices.

The evidence strongly suggests that there is a growing appetite for consumers to manage an increasing number of their health and wellness needs. From monitoring their exercise, diet and sleep habits to taking more control of where and how they access a broad range of healthcare services, consumers across demographics are taking control.

This report presents the findings of our survey and focuses on three key themes that have clearly emerged from the results:

- People are increasingly **taking more responsibility** for their individual health and wellness needs.
- As a result, they are more open to **care anywhere**, willing to access services in non-traditional settings and at home, if it means quicker access and convenience.
- Technology – particularly through mobile devices - is providing the opportunity for **new ways of accessing and delivering healthcare**.

These findings echo what we have found through surveys in other countries. Indeed, Middle East consumers generally appear more willing to adopt new healthcare options than those in other countries. Surveys by PwC and the Economist Intelligence Unit show, for example, that: 43% of those surveyed in Germany are willing to accept products and services from non-traditional healthcare providers[1]; 52% of those surveyed in Canada predict that mHealth (mobile Health) will improve convenience and access to healthcare[2]; and 64% of survey respondents in the United States are open to new ways of seeking medical attention and treatment[3]. While in the UK, 60% are willing to see a GP in a retail store[4]. This compares to our finding of 67% of survey respondents across the Middle East who are willing to receive healthcare in a non-traditional setting – clearly illustrating the existing demand of health consumers for new modes of healthcare in the Middle East.

67%

of survey respondents across the Middle East who are willing to receive healthcare in a non-traditional setting

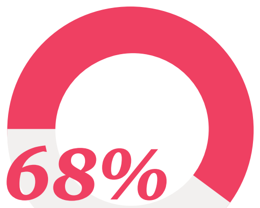
[1] *PwC Germany, Healthcare and Pharma New Entrants (September 2014)*
[2] *PwC Canada, Making Care Mobile: Shifting perspectives on the virtualisation of health care (June 2013), p.14*
[3] *PwC Health Research Institute, Healthcare's new entrants: Who will be the industry's Amazon.com?, (April 2014), p.9*
[4] *PwC UK, Capture the growth: the opportunities for new entrants in healthcare and wellbeing (February 2016), p.19*

Survey findings
Taking responsibility

According to eMarketer and an IPSOS MediaCT survey[5], the Middle East has the second largest mobile phone market in the world - 91% of the UAE population are currently using smartphones, while in Saudi Arabia the figure is 79%. And according to the Qatar Ministry of Transport and Communications, smartphone penetration has reached 75% of their population[6]. Only Asia-Pacific has comparable figures.

Smartphones are already having a huge impact on how healthcare is delivered globally and this is echoed in our survey.

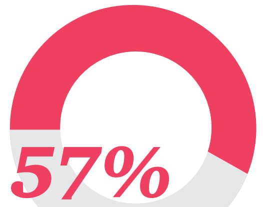
68% of those surveyed across the region have a health-related application on their smart device (this compares to only 25% in the UK) and 1/3 of them use them at least once a day. The most widely used of these applications are those related to exercise and dieting/weight loss (at 26% each).



68%
have a health-related app on their mobile or smart device

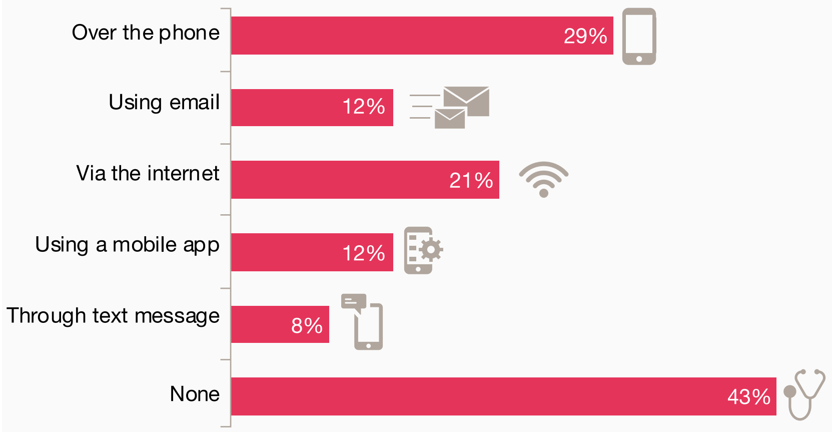
1. What category do your healthcare, wellness or fitness applications fall into?

But the 10-15% range of usage for other health-related apps suggest the beginnings of some interesting behavioural changes. For example, while only 10-12% of respondents have had a consultation with a doctor through a mobile app, more than half (57%) of people across the region have had a doctor's consultation that does not include a face-to-face visit in a hospital or office environment.



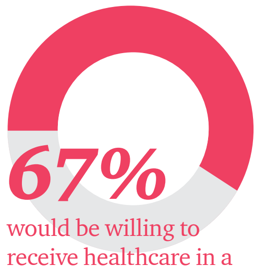
57%
have had a doctor's consultation that is not face-to-face in an office or hospital

2. Have you ever had a consultation with a doctor by any of the following methods?



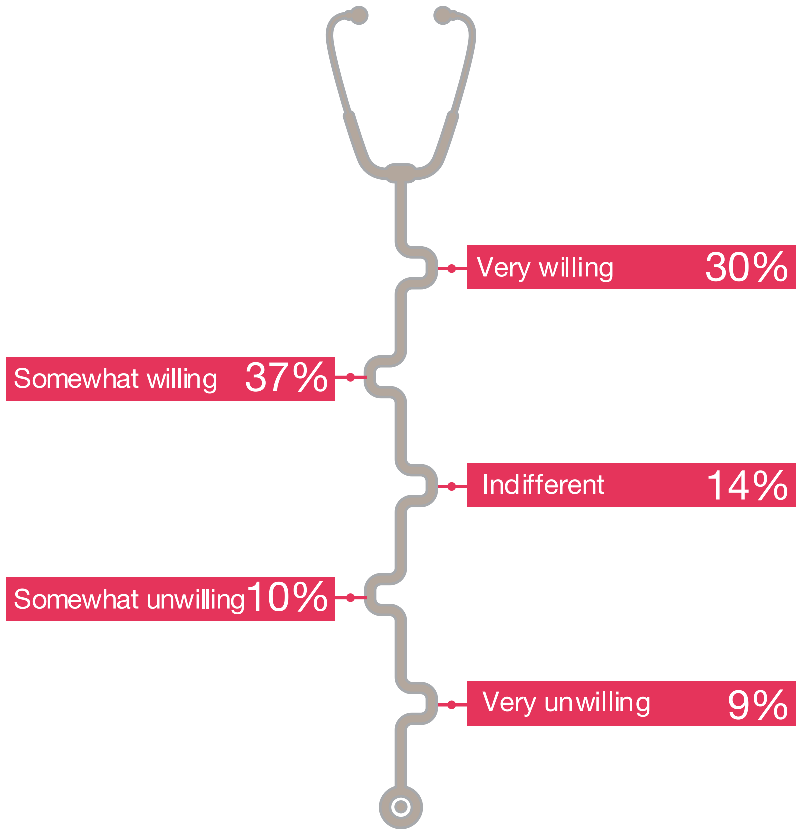
[5] http://www.emarketer.com/Article/Smartphones-Tablets-Spread-Across-Middle-East-Africa/1012989
[6] http://www.ictqatar.qa/en/news-events/news/smartphone-penetration-thrives-qatar-local-smartphone-market-develops

Furthermore, fully 2/3 of respondents would be willing to receive healthcare in a non-traditional setting* if it meant quicker access. Less than 1/5 (19%) are somewhat or very unwilling to receive healthcare in such settings; however, 14% of respondents are indifferent to the choice, suggesting an openness to care and treatment outside of the hospital.



67% would be willing to receive healthcare in a non-traditional setting

3. How willing would you be to receive healthcare in non-traditional settings (non-hospital, non-Doctor/ General Practitioner, non-healthcare clinic) if it meant quicker access?



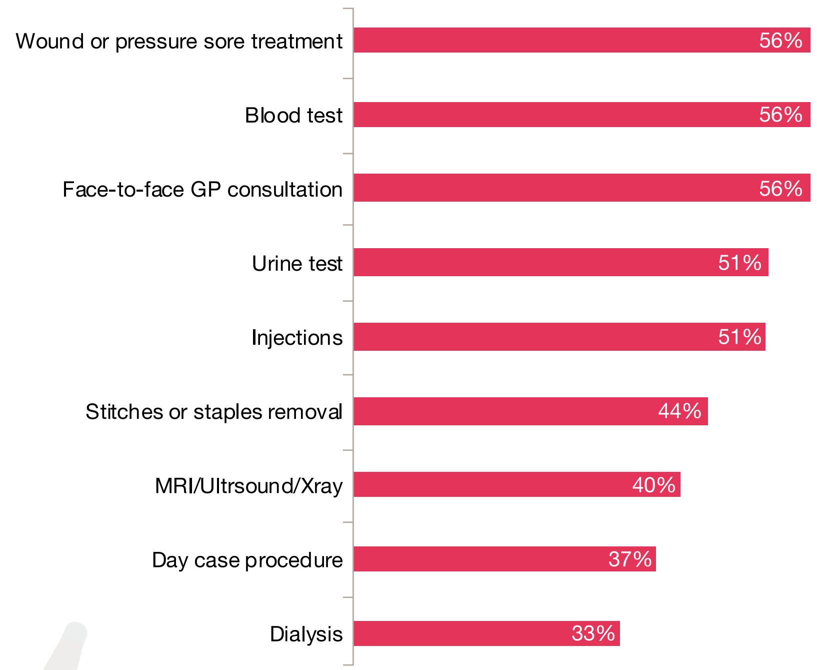
With an overall 2/3 of respondents using healthcare, wellness or fitness apps on their devices and with an overall 2/3 of respondents willing to seek medical advice and many healthcare services outside of a traditional setting, there are clear indications of the vast potential for new ways of delivering healthcare services.

But how open are consumers in the region to new delivery models for healthcare and how likely are they to take up services outside of a traditional setting?

Care anywhere Out of the hospital

We wanted to understand how consumers felt about healthcare services in non-traditional settings, specifically which services they would be likely to use if provided outside the hospital, doctor's office or other conventional clinical environment. We asked respondents to tell us how likely they would be to use specific services for themselves and for a loved one, such as a child or parent, in a clinical setting within a retail store, pharmacy, or mobile unit in a retail car park.

4. Appetite for services provided in non-traditional setting (eg retail store, pharmacy, mobile unit in retail car park)

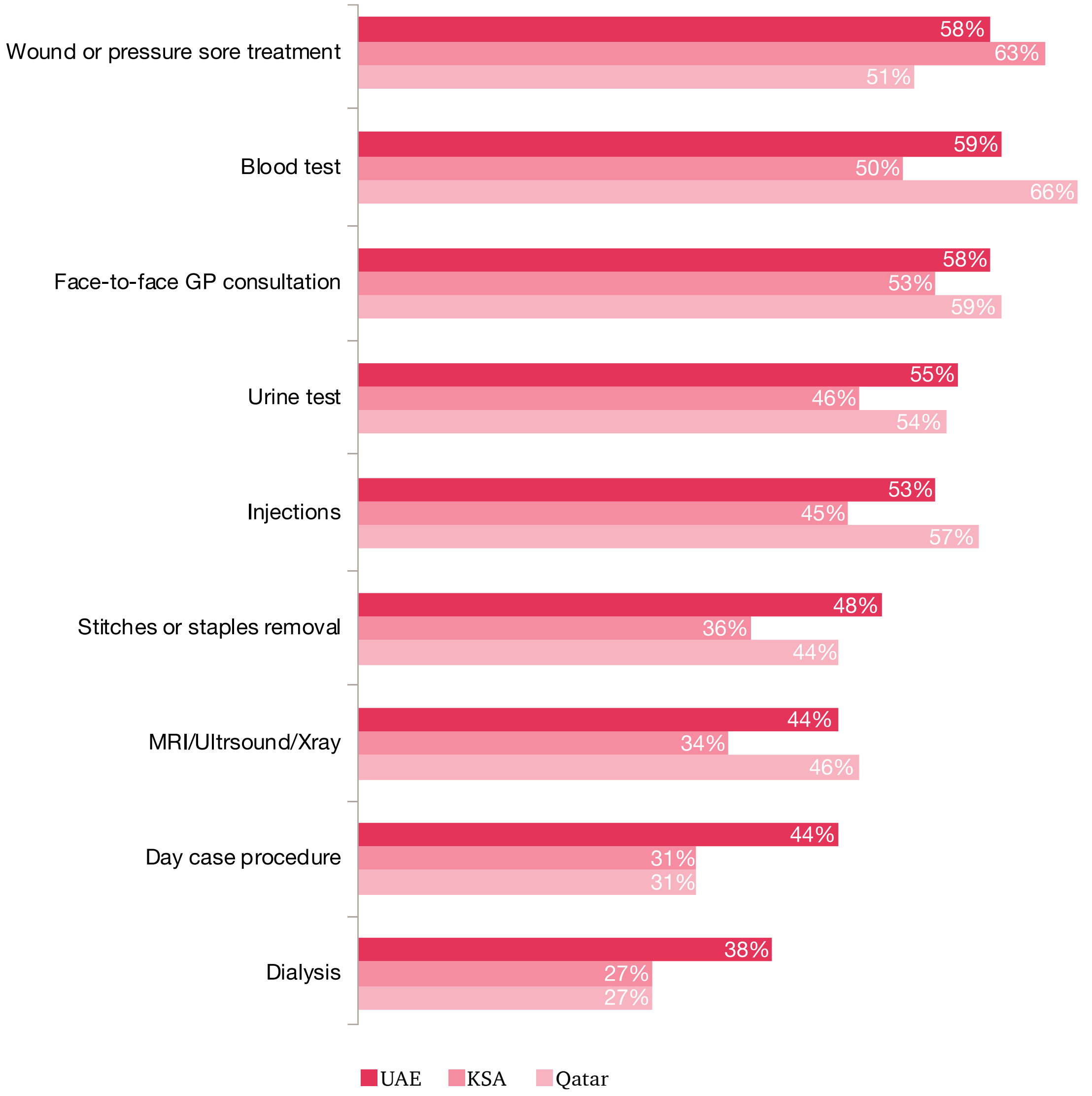


More than half of respondents would be likely to choose certain treatments, tests or consultations within a non-traditional setting such as a retail store, pharmacy or mobile unit within a retail car park. Specifically, consumers across the region would be most likely to choose a GP consultation, treatment for a wound or pressure sore, or blood test (56%), and a urine test or injections (51%) in a setting other than a hospital or established clinic. The findings suggest that those services which are perceived as not related to making a diagnosis are most likely to be welcomed in a non-traditional setting.

However, the findings also suggest that even those services which are diagnostic would be welcomed if the technology or service were available. More than 1/3 of respondents would be willing to undergo dialysis or a day case procedure, and more than 40% would have an MRI, Ultrasound or X-ray outside a traditional setting.

When we looked deeper into the data by country, there were additional interesting results.

5. Appetite for services in non-traditional settings

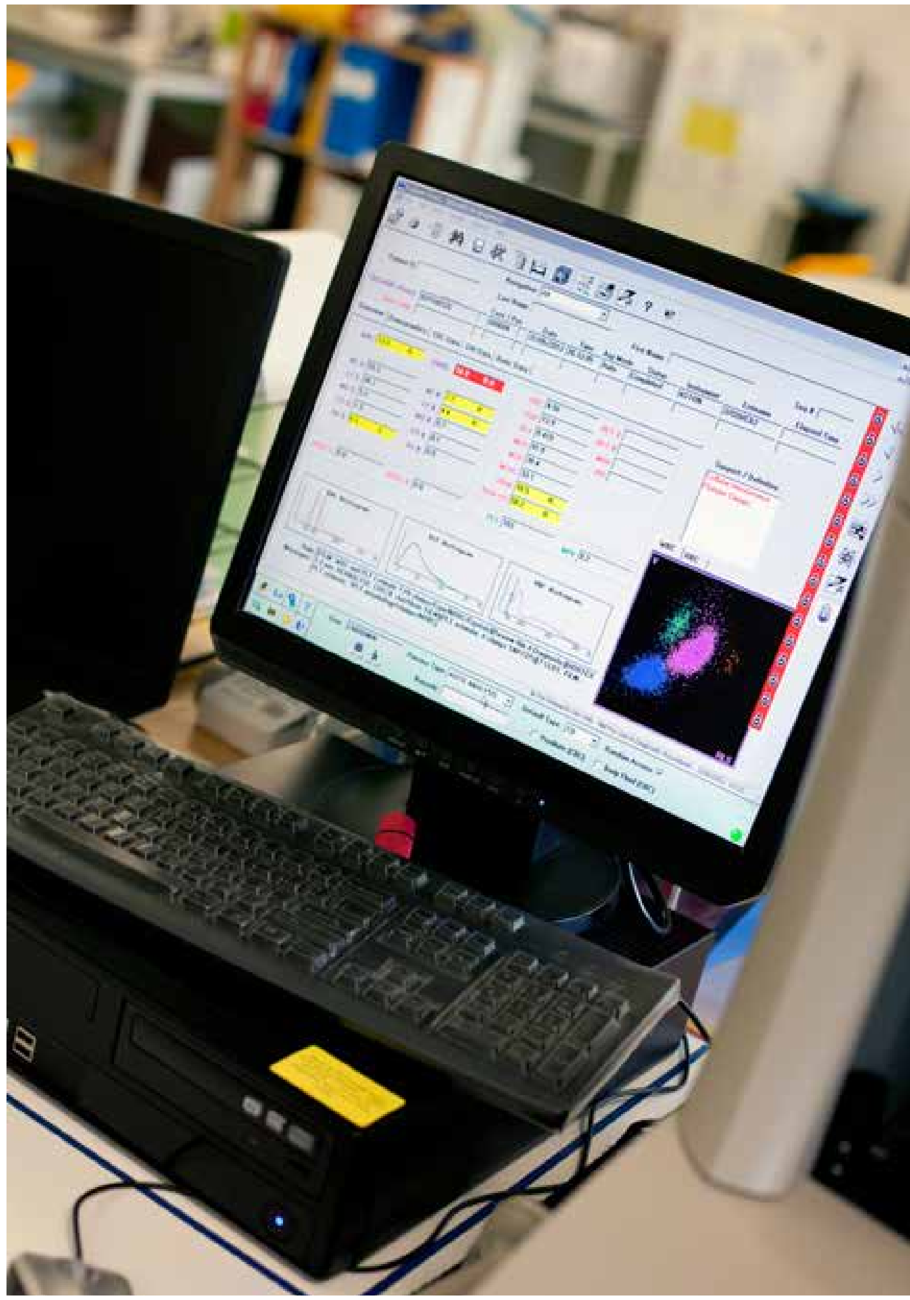


Consumers across the UAE are overall more likely to choose a non-traditional setting for a wider range of services and treatments, from a high 59% for a routine blood test to more complex services such as an MRI, ultrasound, x-ray or day case procedure (at 44%) to dialysis (at 38%). These findings were comparable across all age groups.

Interestingly, consumers across the UAE are significantly more likely to choose a day case procedure or dialysis in a non-traditional setting (44% and 38% respectively) than the KSA or Qatar (both at 31% and 27% respectively). But even these latter findings suggest there is an appetite for such services in non-traditional settings.

In the KSA, consumers are most likely to choose a treatment for wounds or pressure sores (63%), a face-to-face consultation with a GP (53%) or a blood test (50%) in a non-traditional setting, while less likely to choose other treatments, tests or procedures. These finding were also comparable across age groups.

While in Qatar, consumers are most likely to opt for a blood test (66%), wound or pressure sore treatment (61%), face-to-face GP consultation (59%), injection (57%), or urine test (54%).

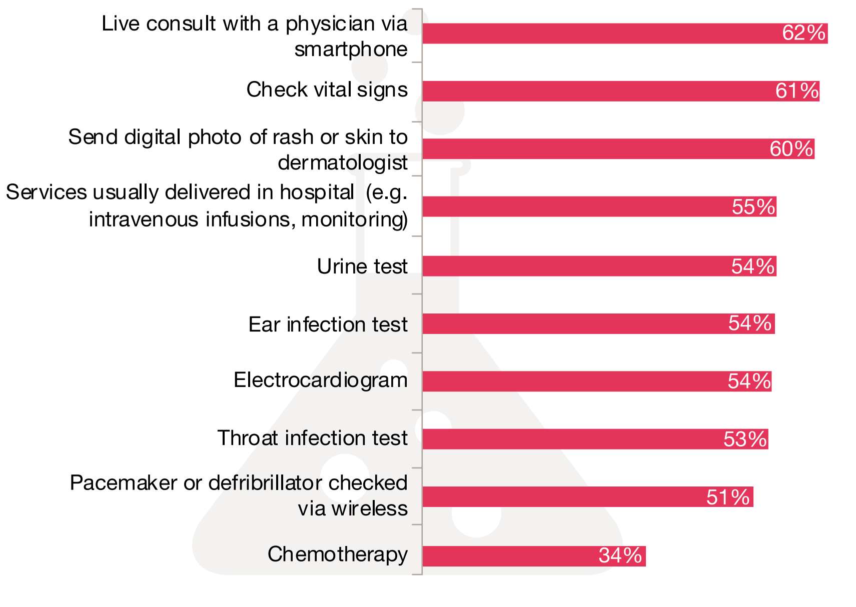


Into the home

We also wanted to understand how likely consumers would be to administer treatments or tests themselves and/or take up specific services in the home, via a device connected to a smartphone or with a test purchased from a retail store such as a pharmacy.

We asked respondents to tell us how likely they would be to use specific services for themselves and for a loved one - such as a child or parent - at home, if the technology or service were available.

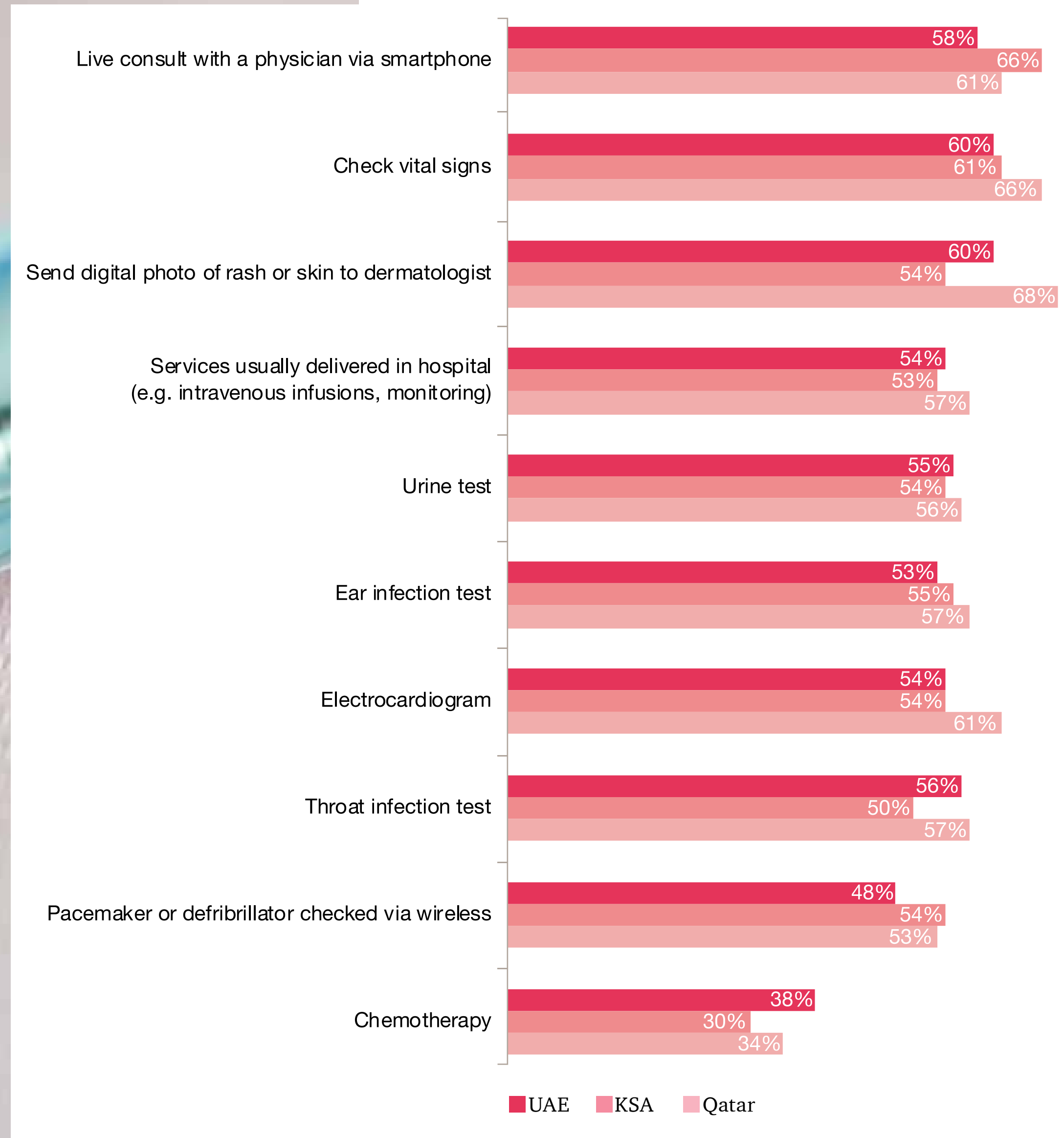
6. Appetite for services delivered at home via smartphone app/ device or test purchased from store



The findings are telling. If the technology or service were available, more than half of respondents were likely to choose a wide range of services, tests and treatments to be delivered in the home – from a live consultation with a specialist via their smartphone (62%) to wirelessly checking their pacemaker or defibrillator (51%). And even though respondents were less likely to opt for chemotherapy in the home, fully 1/3 of them would choose to do so if such a service/ treatment were available to them.

Even when we look separately at the UAE, KSA and Qatar, the findings are remarkably comparable, with more than half likely to choose these services/treatments in the home if they were available. Similarly, chemotherapy in the home remains an option for 1/3 of respondents.

7. Appetite for services at home



Conclusions

So what does this all mean – for government, providers, suppliers, and investors as well as consumers?

Digital at the core

Technology is the catalyst for change; digital is providing the means to connect everyone within the healthcare ecosystem and will be at the heart of healthcare's growth and development. Consumers are not only expecting convenience; they are expecting better quality services over which they have more control. Government, in particular, needs to ensure that policies, regulatory frameworks, and wider societal objectives are clearly defined in order to ensure the focus remains on improving people's lives; while collaboration between providers and new entrants is essential to create and pilot the digital solutions that will serve the population's long-term healthcare needs.

The findings from our survey provide some important indicators for those on the forefront of this brave new world.

For government and traditional providers and suppliers

- Traditional roles are changing.
- Move beyond the treatment and the place of treatment towards the continuum of care (education, wellness, prevention, diagnosis, treatment, monitoring) wherever and however is most convenient for the consumer.
- Partner to create new business models that support this care anywhere through digital platforms.
- Be open to change and innovation, because consumers certainly are.
- Track consumer attitudes and responses to new products and services through the use of data analytics.

For investors and new entrants/ businesses

- Seize the moment. Policy makers are looking to innovate and they are actively soliciting ideas and support to build the best healthcare system in the world in the Middle East.
- Partner closely with providers and policy makers.
- Stay close to the consumer and constantly test the market.
- Align to the entire healthcare ecosystem.
- Be the bridge between traditional healthcare and digital care.

Health is personal

The findings also provide clear pointers to what healthcare services consumers want and where they want to access those services. Developing a smarter healthcare system means focussing relentlessly on meeting consumer needs and understanding their changing attitudes to healthcare and wellbeing. Our research illustrates that:

1. Healthcare is personal - people across the region are very interested in their health, wellness and fitness.

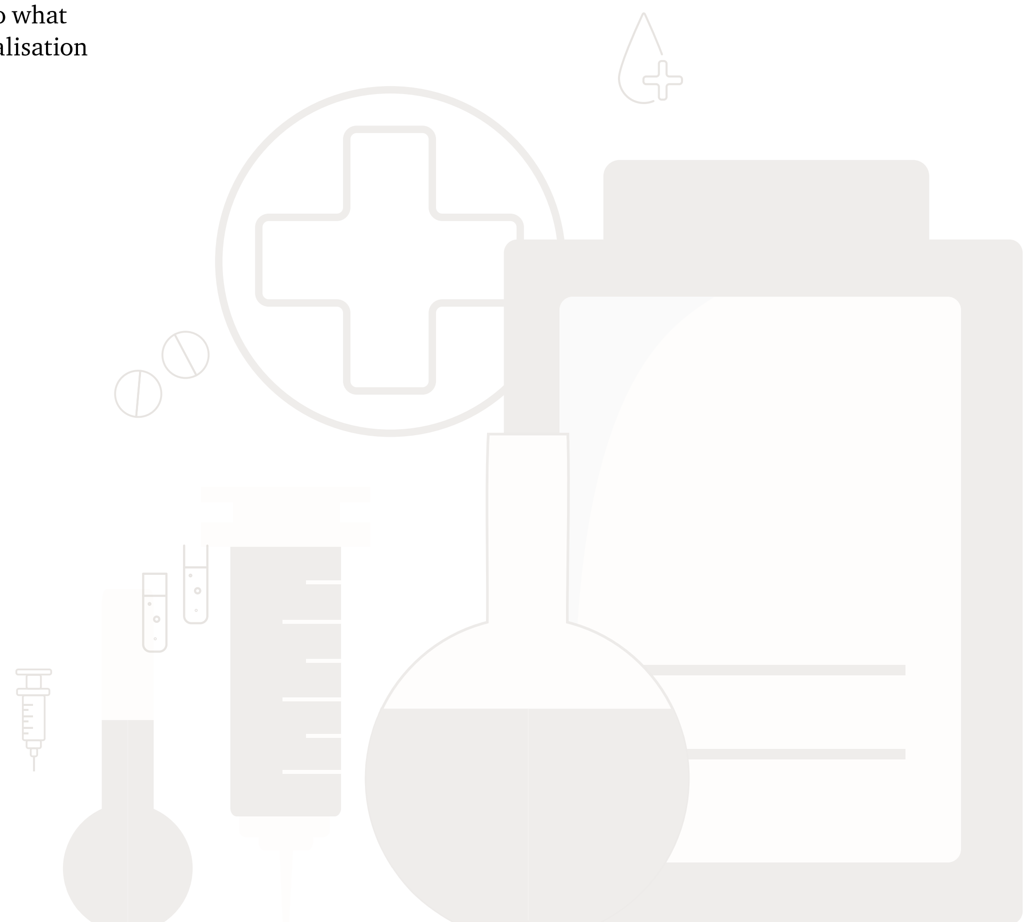
2. Better information at their fingertips can empower consumers to make better decisions about their healthcare.

3. The appetite for healthcare services in non-traditional settings and in the home is already there.

4. Technology - additional apps (products and services) - and convenience (channels) can improve the attraction for new models of care and treatment.

5. There are opportunities for both new and traditional providers to respond to what consumers want – greater personalisation through digital.

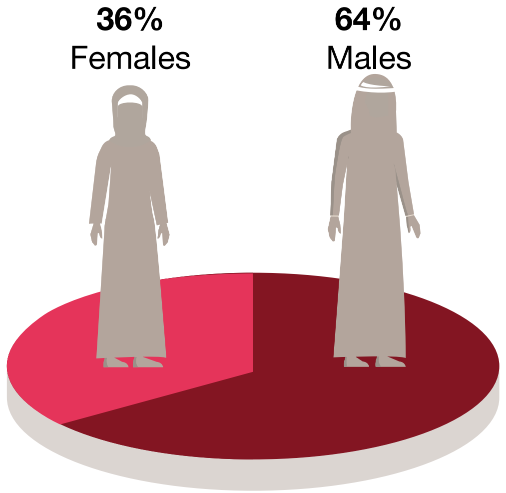
The implications from the survey point to the huge opportunity for government and providers across the Middle East to develop improved health outcomes across their populations. New entrants and investors are poised to promote growth within the healthcare market by developing new products, services and channels, particularly across the digital landscape. And there is enough consumer appetite to create the scale necessary for a good return on investment. But this will happen only if the focus remains firmly on the consumer and if there is real collaboration among all those involved in creating a healthcare system that can be the envy of the world.



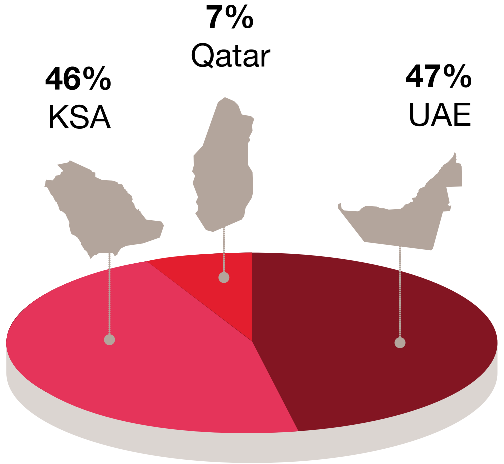
About the survey

This research was conducted in January 2016 by YouGov, the Middle East's most quoted research agency; providers of both qualitative and quantitative research. 2,155 people participated in the survey.

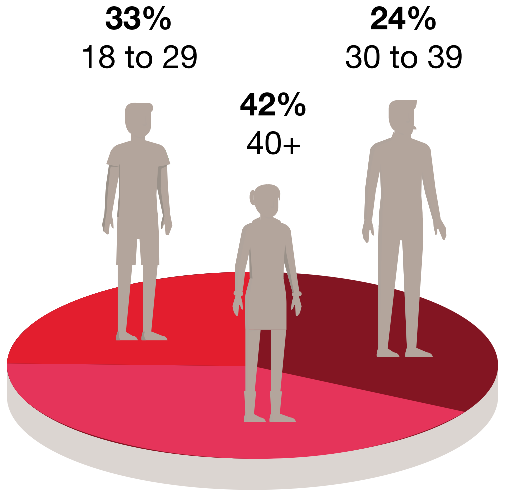
Who we surveyed:



Gender



Region



Age

About PwC Middle East

Our commitment: Deliver value, with you, every day

Established in the region for 40 years, PwC has more than 4,000 people in 12 countries across the region: Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Oman, the Palestinian territories, Qatar, Saudi Arabia and the United Arab Emirates

Our team operates across the Middle East bringing international experience delivered within the context of the region and its culture. We bring the collective knowledge and experience of more than 208,000 people across the entire global PwC network in advisory, assurance and tax to help you find the value you are looking for.

http://www.pwc.com/m1/en.html

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