SWISS HEALTH MONITOR 2022

– SELECTED INSIGHTS –

The Swiss Health Monitor is a nationally representative study by the Institute of Marketing and Analytics. The report provides insights on the current and future state of the Swiss healthcare system from a consumer's perspective.

The study focuses on the ongoing digitalization and innovation potentials within the Swiss healthcare landscape. Further, it also provides insights into the various contact points between consumers (e.g. patients) and service providers. The full report can be purchased through the website of the University of Lucerne (Link). The following summary contains selected insights from the study report as well as the resulting hypotheses on future innovation potentials:

Selected insights of the study report

Insight 1: General attitudes toward Swiss healthcare
73% of Swiss people are (rather) satisfied with the healthcare they receive and 81% rate their general health as good.

Insight 2: Preventive Healthcare
The use of technology such as fitness trackers as a way of supporting health prevention is widespread. 44% of Swiss people who actively practice prevention in their daily lives use this technology regularly. Furthermore, prevention has the highest willingness for additional spending across all age groups – and across the entire customer journey.

Insight 3: Initial contact
Almost 60% of Swiss people do not immediately act when signs of illness appear. However, if professional advice is sought, general practitioners and pharmacies are the preferred initial contacts. This is demonstrated by the high level of satisfaction with the services offered by these two contact points. Digital options such as telephone or video consultation services are only regularly used by around 10% of the population.

Insight 4: Therapy
Although 3 out of 4 Swiss people received professional support during therapy and patient satisfaction is high, 55% of the population claims to have already stopped or not even started a therapy. Across all age groups, over 80% of Swiss people want physical interaction during conservative and surgical therapies. This means they prefer not to treat their illness solely at home, for example through digital means.

Insight 5: Use of artificial intelligence (AI) in diagnosis and therapy
More than 90% of patients have a clear opinion regarding the use of AI. Only 2% would prefer the standalone use of AI in diagnosis and therapy. However, the majority of people across all age groups believe that this technology is a sensible addition during diagnosis and therapy as a way of helping healthcare specialists.

Insight 6: Post care
The demand for post care at home is twice as high as what is currently offered. Additionally, around 40% of the Swiss population has an interest in digital post care (e.g. follow-up care via telemedicine provider).

Insight 7: Point of sale for medicines
Interest in the online sale of both prescription and over-the-counter medicines is very low. 50% of the Swiss population obtains their prescription medicines from their general practitioner. For over-the-counter medicines, around one-quarter of the population also use their general practitioner.

Insight 8: Data sharing
Willingness to share personal health data is approximately 18% greater for anonymous data compared to non-anonymous data. Nevertheless, Swiss people are willing to share their personal health data to improve their own and others' health.

SWISS HEALTH MONITOR 2022

– SELECTED INSIGHTS –

Hypotheses on innovation potentials based on the Swiss Health Monitor insights

Hypothesis 1: Prevention

Digital services for prevention offer significant potential. While these show the lowest satisfaction across the patient journey, they also show the highest willingness to pay. There is a widespread interest in (digital) prevention, meaning there is potential for both direct earnings and access to clients early on in the patient journey.

Hypothesis 2: Initial contact

The significance of general practitioners and pharmacies for the initial contact makes these stakeholders interesting collaboration partners for firms who want to gain access to potential customers early on in the patient journey.
Around one-third of those surveyed are interested in digital interactions with healthcare providers. The low satisfaction and rare use of phone and video consultations offered by health insurance companies should not distract from the fact that potential exists. However, this requires the creation of better and more customer-oriented services.

Hypothesis 3: Therapy

Almost half of Swiss patients have canceled therapies, even though they were satisfied and supported by professionals. This raises the hypothesis that therapies are often over-engineered. Potential cost savings can be achieved through better (digital) monitoring of illnesses and adapted therapy recommendations by doctors.

Hypothesis 4: Use of AI in diagnosis and therapy

The approach of offering AI-based solutions that support healthcare specialists has potential for improvement. Existing AI solutions should be communicated as such towards those affected since such solutions are desired and trusted by the majority of those surveyed.

Hypothesis 5: Post care

Only 50% of the market potential for post care services at home is currently utilized, opening the door for a broad range of (digital) services in this field. On the other hand, this is a potential threat for current stakeholders offering traditional post care solutions. However, in contrast to post care, the potential for offering therapies at home is limited.

Hypothesis 6: Point of sale for medicines

The strong influence of medical professionals on direct sales and recommended medicines offers significant potential for online pharmacies to partner with general practitioners. For example, the general practitioner can order medicines and have them sent directly to the patient's home via the online distributor.

Study design

- Online panel of LINK from the three language regions of Switzerland
- Representative Swiss sample (N = 1'028)
- Data collection: June 15 to July 2, 2022

Demographic distribution of the sample

Average age	45 years
Gender	49% female, 50% male, 1% other
Language region	71% German-speaking, 24% French-speaking, 5% Italian-speaking

Representation of healthcare stakeholders targeted by respective hypotheses

- Clinics/hospitals
- General practitioners
- Health insurance companies
- Medical manufacturers
- Pharmacies
- Start-ups / new entrants

Detailed report

These and numerous other insights are available in the detailed study report of the Swiss Health Monitor. Throughout, the report takes the perspective of the Swiss population and divides these up at selected points according to the character traits of the respondents. The study report is part of the Swiss Consumer Studies. The selected insights as well as the complete study report can be found under the following link: www.swissconsumerstudies.ch

For further inquiries, please contact swissconsumerstudies@unilu.ch.

Citation

Lingens, B., Ottiger, Y., Jenni, P., Funk, G., Imboden, N., Finken, D. (2022). Swiss Health Monitor 2022, *University of Lucerne.*

Acknowledgment

LINK

The study partners would like to express their sincere thanks to the LINK market research institute for supporting the Swiss Health Monitor 2022.

UNIVERSITÄT LUZERN

Institute of Marketing and Analytics

B|BRAUN SHARING EXPERTISE