

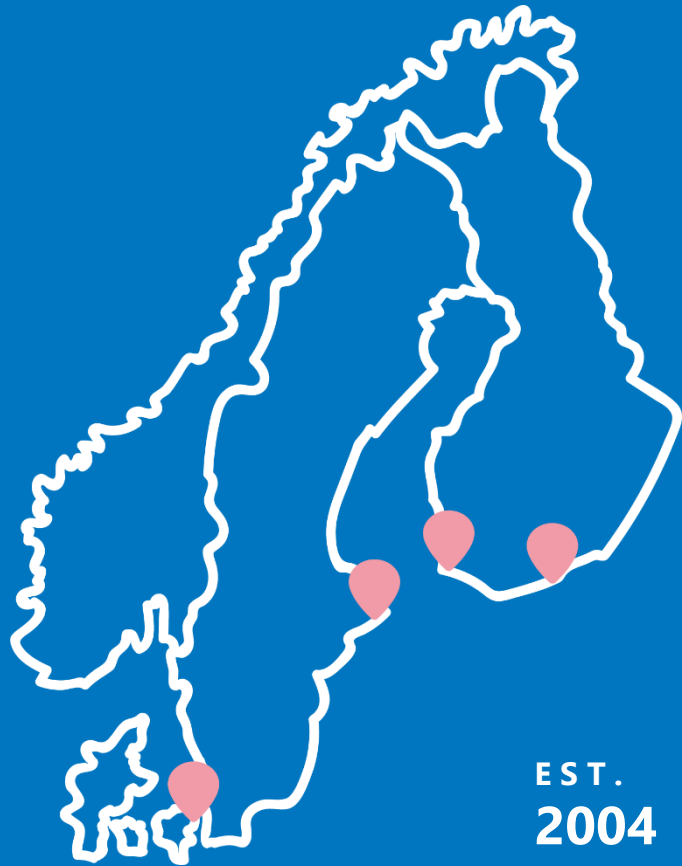
“Disruptive impact of the COVID-19 to the digitalization of the Primary Health Services”

Digital Business Transformation Conference

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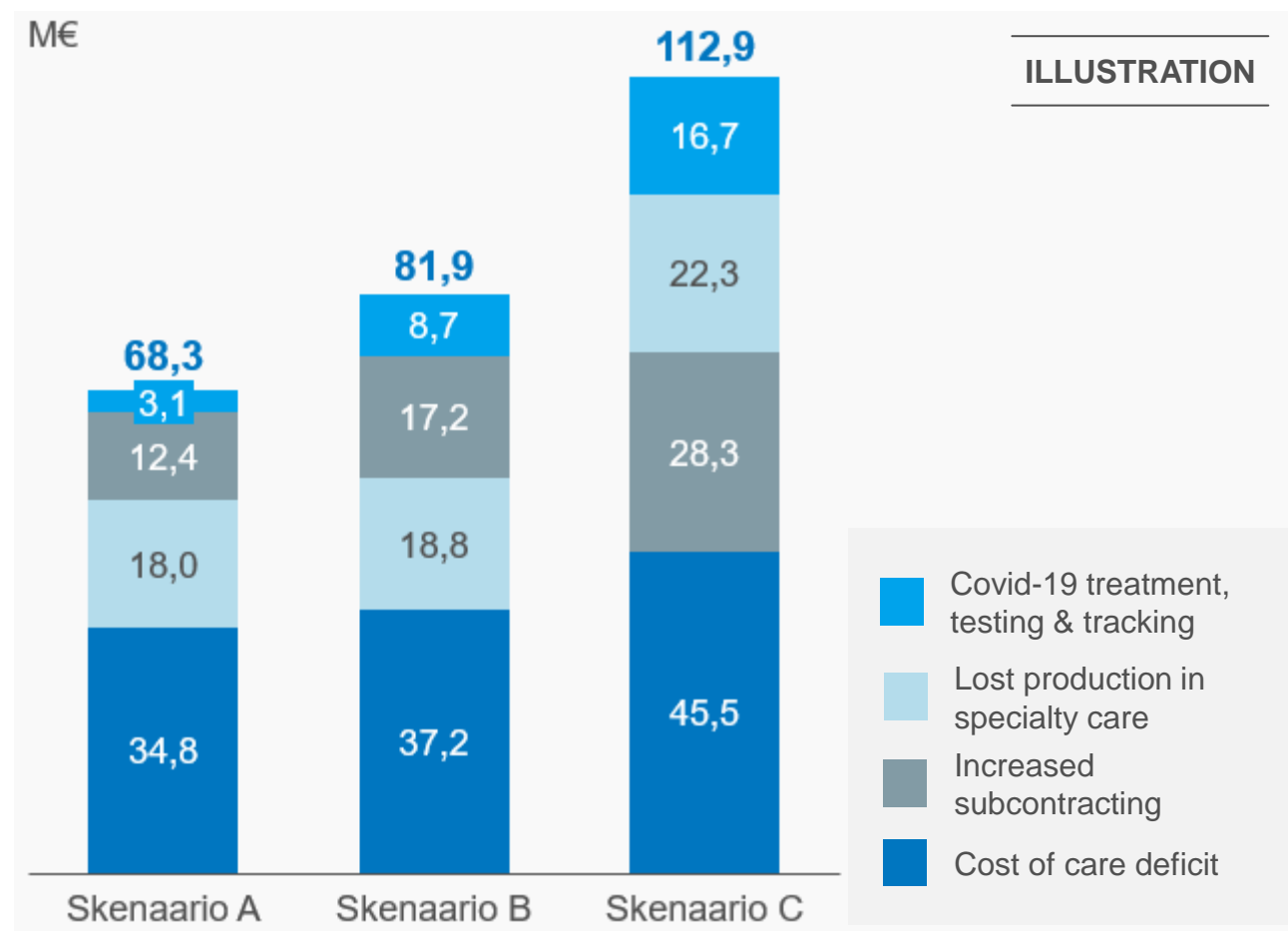
More than 200 million
patient visits analyzed



Covid-19 pandemic has had massive impact on healthcare in all countries – treatment cost are minor issue compared to indirect impacts

Covid-19 pandemic impact on health care

Estimated overall Covid-19 related costs in three spreading scenarios (2020-2022) in one integrated social and healthcare provider*



*) Source: NHG Analysis in one integrated social and healthcare provider May 2020

**) Source: Finnish institute for health and welfare

Biggest impact comes from cumulation of “care deficit”, especially in chronic diseases

- Shutting down or postponing elective (non-acute) operations due to pandemic
- Precautions and preparations for pandemic reallocating resources
- Additional mental health and social issues due to pandemic in addition to direct costs

Pandemic causes additional costs and care deficit in all regions, also the ones that have not been so severely hit

- In Finland primary care visits are down 50% since start of the epidemic in March** both due to reductions in availability and patients reluctance for physical interactions

Pandemic has created evident demand for digital services, that could serve as key means to tackle treatment debt and indirect costs of pandemic

Key rational for digital services to counter impacts of pandemic

Patients

Don't want to come to physical visits due to pandemic

Remote work

Whole professional world has shifted into remote mode – patients are expecting services to be available online

Clinicians

Don't want to meet patients face-to-face due to pandemic

50-60%

Of the visits in primary care could be handled online*, most suitable candidates being follow-up visits and typical allergies and infections

Digital services should have a key role in every exit scenario for this pandemic – shown ambition so far has been disappointment

Level of ambition, case Finland

There as been some activity to increase digital and remote services among both private and public providers with positive feedback from public and professionals

Volumes in digital services have been less than 5% among public healthcare providers despite recent increases in volumes

Volume targets should be way over 50% of traditional physical visits since normal appointments are still lagging behind

There is no reason why remote services should not be **operated at maximum capacity all the time**

Digital clinic is already the biggest clinic based on number of visits for leading private healthcare provider in Finland (share of remote visits ~20%)

This should not be limited only to pioneers in the field, but more broadly **all the providers should take action**

There are examples where everything has been made into proactive citizen communications, remote visits, drive-in laboratories, home delivery of drugs

There are many other areas where digital can help –e.g. remote monitoring, precision medicine, customer case management, operations management. This just takes a bit more time than starting running digital clinics.

Transformation in the use of digital services does not happen by itself – it requires determined and timely actions from health care providers and their partners

What is needed to be successful in the pending transformation?

Required characteristics for successful transformation in the use of digital services

Most likely areas with issues

- **eCommerce logic** – Customers are guided into digital services, goal being to get as many of the patients to do business in digital channel by using all the means more typical to B2C business
- **Access to services** – There needs to be both availability and accessibility in the digital channel to make it a viable option for taking care of health. Services need to be easy and simple enough.
- **Organizing work of healthcare professionals** – In order to shift volumes from physical channel into digital channel, there needs to be enough healthcare professionals to handle the demand in the digital channel and there needs to be proper support for them to excel
- **Technology support** – Technology needs to work throughout the whole customer journey. Customer doesn't care about your reasons for failing to do this.
- **Demand management** – The demand that cannot be handled in digital channel will need to be diverted to physical channel. There is a need for a prioritized backlog of cases and prioritization should be value-based (e.g. ones with most impact with the least effort to the top)

Pandemic has amplified the need for digital service – ambition for healthcare should be a transformation in the use of digital services and the time is now

Conclusion and summary

Summary

- Digital technology and remote services will be a vital part of Covid-19 recovery and the "new normal"
- You don't treat Covid-19 remotely, but you can treat the half of the population health issues that are about to become collateral damage of the pandemic

Conclusion

- All the needed technology is available in the market and there is help available for leveraging it
- Ambition cannot be on small scale piloting and playing around when there is clear demand for these services from patients and professionals and the society
- The faster digital takes a larger share the faster it creates benefits, it can be started with one digital clinic and scaled up with increasing demand
- Key for scaling up is to make it easy for all stakeholders, provide much needed support, ensure intuitive tools, promote digital services and make it a priority to shift volumes to digital channels

Time for digital revolution and remote services in health care is now!

