Digital is Transforming Health, So Why is Consumer Adoption Stalling?

Accenture 2020 Digital Health Consumer Survey
US Results
In 2020, the rapid rise of digital health shows signs of stalling. Digital health uptake among consumers has been considerable in recent years, but this year that momentum stopped. Yet despite the current decline in digital adoption, many consumers are interested in virtual services—and these numbers will likely rise as digital-savvy generations age.

What will it take to jumpstart digital health? Trust is a key issue, and healthcare providers are essential to building it. Today, security and privacy concerns have grown, especially toward technology companies entering the health market, even as consumers continue to trust doctors and other non-medical doctor (MD) care providers. These providers will play a pivotal role in future digital adoption as they increasingly incorporate new tools into their business and care models, encourage consumers to use digital to manage their health and provide a critical level of trust that digital alone cannot yet match.

The survey provided the following definitions:

**Virtual healthcare**
includes services and support needed for wellness, diagnosis and treatment; care is available regardless of a patient’s location. The provider and patient are in different locations, with support and care provided through video, mobile device apps, secure email, text/SMS messaging or online social platforms.

**Digital healthcare**
includes tools and technologies such as electronic health/medical records, mobile solutions, wearables that track fitness, lifestyle and vital signs, smart scales and chatbots.
For the first time in our multi-year, multi-country research program, we’ve seen no uptick in digital health management activity by US consumers—in fact, it dropped in certain areas. While actual users see benefits in these services, growing mistrust in the technology industry, security concerns and a cumbersome first digital experience may have turned some people off or kept them away. Consumers look to trusted providers to motivate them to manage their health, however, so far, relatively few doctors are recommending digital tools to do so.

ARE CONSUMERS GIVING UP ON DIGITAL HEALTH?
Growth in consumer use of mobile apps and wearables stalled

Consumers’ use of digital tools to manage their health has declined in the past year. In fact, one-third of US consumers surveyed (33%) are not using any digital tools to manage their health. Use of mobile devices and applications fell from nearly half (48%) using these tools in 2018 to only 35% in 2020. Use of wearable technology—for instance, devices that collect health data such as fitness and vitals—has decreased from 33% in 2018 to just 18% in 2020.

Use among younger generations dropped significantly. Mobile apps went from 63% for those ages 18-34 in 2018 to 50% in 2020, with wearables use sinking from 43% in 2018 to 26% in 2020 (not only has the fitness-tracker fad cooled, but general purpose smart watches are stealing market share). Use among those 65 years of age and older is holding steady, with 20% using mobile apps in 2020 compared to 19% in 2018, and 13% using wearables in 2020 compared to 15% in 2018.

Figure 1. Fewer consumers are using digital tools to manage their health

Mobile phone/tablet applications
(e.g., tracking personal activity/diet/fitness/weight loss/etc.)

<table>
<thead>
<tr>
<th>Year</th>
<th>2014</th>
<th>2016</th>
<th>2018</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usage</td>
<td>16%</td>
<td>33%</td>
<td>48%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Wearable technology
(e.g., consumer or medical devices that collect information about an individual’s health, such as fitness, vitals and lifestyle)

<table>
<thead>
<tr>
<th>Year</th>
<th>2014</th>
<th>2016</th>
<th>2018</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usage</td>
<td>9%</td>
<td>21%</td>
<td>33%</td>
<td>18%</td>
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</table>
Users see benefits in digital health—but not always

Despite the drop in use, those consumers who use digital tools and services to manage their health are experiencing benefits. In fact, 43% say these services have “increased my focus on wellness and prevention” and 34% say digital services have given them a better understanding of their health. Nearly one-quarter of consumers (24%) say digital health services provide “increased convenience of accessing care.” But while consumers see benefits in their health and wellness, they are not experiencing much benefit from use of digital health technologies in their interactions with medical providers. Only 19% say the services helped reduce times with doctors and just 18% say the services gave their care team more information about their health.

Q: Think about the digital tools and services that you noted you use in the last question, including mobile phone/tablet applications, wearable technology, chatbots, etc. To what extent has your use of digital tools and services benefited you, if at all?

*Figure 2. Greater focus on wellness and better understanding of one’s health viewed as top benefits of digital health services*
Consumers look to providers for motivation to manage their health

Nearly a quarter of healthcare consumers (23%) say reliable and secure digital tools that help them to understand their health habits would motivate them to take a more active role in managing their health, yet according to consumers, only 11% of healthcare providers recommend digital tools for patient health management. Healthcare consumers are looking to providers for such motivation. In fact, “trusted healthcare professionals” ranked highest among factors that would motivate consumers to take a more active role in managing their health—55% said this would motivate them. Consumers (34%) also ranked convenient access to these professionals (virtually or in person) as a motivating factor.

Q: Which of the following would most motivate you to take a more active role in managing your health?

1. Trusted healthcare professionals who work closely with me to manage my wellness
2. Financial support or incentives to stay healthy
3. Convenient access to healthcare professionals, either virtually or in person
4. Personalized information about what I should do to stay healthy
5. More time and energy to make healthy choices
6. Reliable, secure digital tools that help me understand and manage my health habits
7. If my healthcare professional told me to
8. Nothing would motivate me to take a more active role in managing my health

Figure 3. Trusted care providers motivate consumers to manage their health
For providers that use digital, a bad first impression can turn consumers away

Half of healthcare consumers surveyed agree that a bad digital experience with a healthcare provider ruins the entire experience with that provider—and 39% believe a good digital interaction has a major influence on the patient experience. More than a quarter (26%) are even willing to switch to a new provider for high-quality digital services. Consumers who have a primary care physician (PCP) who have a bad digital experience with a provider (52%) say that it ruins the entire experience with the provider compared to 42% of those without a PCP.
CONSUMERS’ CONCERNS ABOUT DATA SECURITY AND PRIVACY HAVE INCREASED

When consumers lack trust in how their data is being used, they may be less likely to use digital services. Security and privacy concerns have increased in recent years as healthcare consumers are not confident their data is being protected and used properly. Trust in technology companies has declined significantly, likely due to the proliferation of high-profile stories about data breaches, yet many younger consumers will still trust these companies to deliver health and wellness services. While consumers trust their doctors more than anyone else, there is substantial trust in non-MD care providers such as nurses, nurse practitioners and physician assistants (PAs).
Many consumers have lost trust that their health information is secure

In 2019, 89% of healthcare consumers trusted their doctor or other provider “very much” or “some” to keep their digital healthcare information, such as electronic medical records, secure. That percentage dropped to 83% in 2020. Trust in tech companies has also declined. More than half of consumers (55%) do not trust these companies to keep digital health information secure. When asked “how much do you trust each of the following organizations or people to keep your digital healthcare information secure,” doctors ranked as second-most trusted (83%)—following hospitals (84%)—whereas tech companies ranked second to last (45%).

Figure 5. Consumers have less trust in tech companies and doctors to keep information secure

Q: Overall, how much do you trust each of the following people or organizations to keep your digital healthcare information (including electronic medical records and other information) secure?
Q: Overall, how much do you trust each of the following people or organizations to keep your digital healthcare information (including electronic medical records and other information) secure? "Very much" and "Some" responses.

<table>
<thead>
<tr>
<th>Trust Level</th>
<th>Person or Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>84%</td>
<td>Hospitals I visit</td>
</tr>
<tr>
<td>83%</td>
<td>My doctor(s) or other healthcare providers</td>
</tr>
<tr>
<td>82%</td>
<td>My pharmacy</td>
</tr>
<tr>
<td>80%</td>
<td>Labs that process my medical tests</td>
</tr>
<tr>
<td>75%</td>
<td>My health insurance company</td>
</tr>
<tr>
<td>74%</td>
<td>Urgent care or walk-in retail clinics I visit</td>
</tr>
<tr>
<td>63%</td>
<td>Non-medical staff at my doctor’s or healthcare provider’s office</td>
</tr>
<tr>
<td>45%</td>
<td>Tech companies</td>
</tr>
<tr>
<td>38%</td>
<td>Government</td>
</tr>
</tbody>
</table>

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Younger generations have greater trust in tech companies

While trust in technology companies’ security measures has declined overall, younger generations partially still trust their services. Nearly one-third of Gen X (32%) and 43% of millennials trust tech companies for health and wellness services, compared to only 20% of baby boomers and 14% of the silent generation.

Figure 7. Millennials trust health and wellness services offered by a tech company (rather than a traditional provider) more than other generations

Q: To what extent do you trust the following? “Strongly” and “Moderately trust” responses.
People trust providers, but less so when technology is involved

Perhaps not surprisingly, doctors are the most trusted actors in the healthcare ecosystem—75% of consumers “moderately” or “strongly” trust medical doctors. However, nurse practitioners and PAs follow close behind with 69% of consumers having trust in these providers. These percentages drop when technology is involved. Just over half (52%) trust diagnoses or treatments determined by a physician supported by an intelligent machine or artificial intelligence (AI); however, only 31% trust diagnoses or treatments determined entirely by these technologies.

**Figure 8. Consumers trust clinicians (doctors, nurses and physician assistants) most**

<table>
<thead>
<tr>
<th>Medical doctors</th>
<th>Nurse practitioners and physician assistants</th>
<th>Diagnoses or treatments determined by a physician supported by an intelligent machine/AI</th>
<th>A health and wellness service offered by a technology company, rather than from a traditional provider</th>
<th>A health and wellness service offered by a retailer or consumer brand</th>
<th>Social media accounts from healthcare brands</th>
<th>Health advice from articles and videos share on social media</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>10%</td>
<td>16%</td>
<td>38%</td>
<td>41%</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>11%</td>
<td>21%</td>
<td>33%</td>
<td>35%</td>
<td>34%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>75%</td>
<td>69%</td>
<td>52%</td>
<td>28%</td>
<td>26%</td>
<td>24%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Q: To what extent do you trust the following?

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Security and privacy concerns stall adoption of digital health solutions

When asked what would keep consumers from using chatbots, computers or digital devices for health questions and care, 41% ranked “concerns about my privacy or data security” as the number one barrier. It ranked among the top barriers for 64% of those surveyed.

Q: What might keep you from using chatbots, computers or digital devices for your health questions and care?

Figure 9. Privacy concerns and lack of trust hinder use of digital solutions

<table>
<thead>
<tr>
<th>Concerns about my privacy or data security</th>
<th>41%</th>
<th>9%</th>
<th>8%</th>
<th>6%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t trust the effectiveness of the service</td>
<td>22%</td>
<td>29%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Prefer my current providers</td>
<td>16%</td>
<td>19%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Have not heard of any</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Don’t take the initiative to try something new or change my habit</td>
<td>6%</td>
<td>9%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know where to start</td>
<td>5%</td>
<td>8%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Lack of access or affordability of the devices I need</td>
<td>4%</td>
<td>9%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>None of the above</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
CONSUMERS REMAIN INTERESTED IN VIRTUAL CARE

Despite the decline in adoption of digital health technologies and waning trust, consumers remain interested in virtual health services. Younger generations even prefer virtual over in-person care in some cases, when given the choice. And although consumers would be willing to receive virtual services from traditional care providers, they are also open to receiving virtual services from tech companies and retail brands. These numbers will likely rise as digital-savvy generations come of age.
Consumers continue to want virtual care services

If given the choice, many healthcare consumers would choose virtual for basic care services, and even for specialty care. They “definitely” or “probably” would receive health and wellness advisories (62%), remote monitoring of ongoing health issues through at-home devices (57%) and more than half (52%) would choose virtual for routine appointments. Many are open to receiving diagnoses virtually—42% for illnesses, diseases and disorders and 44% for appointments with medical specialists for diagnosis or acute care.

Figure 10. Consumers are open to virtual care—from basic to specialty services

Q: Which of the following would you do virtually if given the choice? “Definitely” and “Probably would do virtually” responses.
Younger healthcare consumers are open to virtual over in-person care

Overall, most consumers (81%) prefer physical, in-person experiences with care providers over digital experiences, but these numbers drop among younger generations. Among Gen Z, 41% would prefer a virtual or digital experience with a doctor or other medical professional, along with 33% of millennials.

Figure 11. Younger consumers are more open to virtual care over in-person care
Consumers are willing to receive virtual care from a variety of sources

While higher numbers of healthcare consumers are open to receiving virtual healthcare services from their traditional providers (54%), they are also willing to receive virtual care from technology or social media companies such as Google and Microsoft (27%); retail brands such as Best Buy, Walmart and Amazon (25%); and medical startups (21%).

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual care from traditional medical care providers</td>
<td>54%</td>
</tr>
<tr>
<td>Virtual care from technology or social media companies</td>
<td>27%</td>
</tr>
<tr>
<td>Virtual care from retail brands</td>
<td>25%</td>
</tr>
<tr>
<td>Virtual care from medical startups</td>
<td>21%</td>
</tr>
<tr>
<td>I am not willing to try virtual healthcare</td>
<td>17%</td>
</tr>
</tbody>
</table>

Q: Would you be willing to receive any of the following kinds of virtual healthcare?
Openness to receiving virtual care from non-traditional entities varies among age groups

Comparatively, younger generations are more open than older generations to receiving virtual care from entities outside of their traditional provider relationship. For instance, Gen Z respondents are more willing to receive virtual healthcare from technology or social media companies (46% Gen Z compared to 20% of baby boomers) and from retail brands (34% Gen Z compared to 20% baby boomers).

Figure 13. Willingness to try virtual care from tech companies

- Silent generation (1928-1945): 30%
- Baby boomers (1946-1964): 20%
- Gen X (1965-1980): 27%
- Millennials (1981-1996): 33%
- Gen Z (1997-2001): 46%

Figure 14. Willingness to try virtual care from retail brands

- Silent generation (1928-1945): 28%
- Baby boomers (1946-1964): 20%
- Gen X (1965-1980): 26%
- Millennials (1981-1996): 30%
- Gen Z (1997-2001): 34%

Q: Would you be willing to receive any of the following kinds of virtual healthcare?
RECONNECTING WITH CONSUMERS

The rapid rise and stall out of digital adoption among healthcare consumers reveals a need for payers, providers, tech companies and others in the healthcare ecosystem to reconnect with those they have the potential to serve digitally.

Healthcare consumers are using and benefitting from digital in their everyday lives, and they may be more likely to use digital services to manage their health if they feel these services are secure, useful and recommended by their trusted providers. Payers and providers can work together to understand how to best fit these technologies into business and care models to deliver high-quality services to patients. And tech companies, along with other new entrants, can develop solutions that earn back the trust of consumers who are trying to protect and improve their most valuable asset—their health.
Opportunities to grow digital health include:

**Designing services that matter**

Solutions should digitize and track information that is relevant and valuable to both care providers and consumers. Providers can then act on insights that matter to improve people’s health. Healthcare service providers can develop digital solutions that offer a simple, intuitive and secure experience. Human-centered design will help with developing services that have a deep understanding of user needs and wants. Features and functionality aren’t enough.

**Fitting services into clinical practice**

Digital health currently doesn’t fit into the clinical day to day. Care providers, especially doctors, do not want to waste precious time that they could be applying in other areas that add value to the patient experience. Digital and virtual health solutions can be integrated into processes, business models and workflows—fitting inside the way healthcare is delivered. Healthcare organizations have the opportunity to put in place systems that allow providers to recommend digital services to patients and collect and interpret patient data from these services as part of practice.

**Fostering trusted relationships**

Healthcare data is highly sensitive, and organizations should consider doing whatever they can to protect it. The design of digital health services should factor in privacy, security and trust. Making security and privacy top priorities for established providers and new entrants in the healthcare market will build confidence for engaging with the system. Trust may deepen once consumers see how providers are strengthening security measures for ongoing operations. Ecosystem participants bring unique strengths and talents and can work together to shape stronger digital solutions.
Accenture commissioned a seven-country survey of 7,804 consumers aged 18+ to assess their attitudes toward technology adoption, wellness management and their changing relationship with providers. It is the latest in a series of annual health technology surveys tracking the perspectives of consumers, with a particular focus this year on the shifting needs and desires of consumers and how they align with the trends that are redefining services provided by healthcare systems. The online survey included consumers across seven countries: Australia (1,000), England (1,002), Finland (800), Norway (800), Singapore (900), Spain (1,000) and the United States (2,302). The sample is spread across a range of ages, income levels, and represent a range of races/ethnicities, education levels, and types of employment. The survey was conducted by Oxford Economics on behalf of Accenture between November and December 2019. Where relevant, the survey uses select findings from the Accenture 2019 Digital Health Consumer Survey, the Accenture 2018 Consumer Survey on Digital Health, the Accenture 2017 Consumer Survey on Healthcare Cybersecurity and Digital Trust and the Accenture 2016 Patient Engagement Survey.

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