

Insights from 2016 China
Patients Survey

Chinese Patients
are Expecting Easy
Seeing-a-Doctor and
Internet Medical

High performance. Delivered.



Healthcare is an issue that concerns people everywhere. Given China's vast territory, large population and disparities between the coastal and inland areas, many people in the country struggle to get access to medical treatment. To improve the healthcare system and to provide access to affordable medical care, China has introduced a number of major reforms over the years. For instance, the healthcare reforms of 1997 aimed to widen health insurance coverage for urban employees and check medical costs. Another round of reforms was introduced in 2009 with the aim of providing affordable medical care for the entire population by 2020.

Despite the reforms, problems remain and China's healthcare system is still not able to fully meet the healthcare needs of its 1.3 billion people. Lack of access to medical care—compounded by migration, uneven development of healthcare resources, people flocking to bigger hospitals and specialist doctors, among other factors—is one of the biggest concerns among the public. And the number of patients is only growing. In 2015, patients in China made more than 8 billion visits, or nearly six visits per person, to clinics and hospitals. The frequency of such visits is growing by more than 6 percent annually because of the aging population, environmental pollution and increasing health awareness.¹

As China seeks to improve healthcare delivery to its 1.3 billion people, Internet-based healthcare services—which have been flourishing thanks to the rapid growth of the Internet, and expanding Internet and mobile usage—offer solutions to plug several inefficiencies in the system. Digital healthcare can help in solving issues like overcrowding of large hospitals, in providing a personalized healthcare service, and in achieving the country's goal of healthcare for everyone.

Can digital healthcare really make a difference? Can it help China in providing its people safer, cheaper, more effective and more convenient medical services? To find a clear answer to that, Accenture, WeDoctor (formerly guahao.com) and the China Health Promotion Foundation (CHPF) cosponsored a survey of the medical treatment and health management behaviors of the Chinese people, with the objective of understanding the challenges people face in seeking healthcare and to see how electronic medical care can improve the efficiency of the country's healthcare system.

More than 20,000 people across the country participated in the survey conducted from December 2015 to January 2016, via online questionnaires or offline interviews and more than 12,000 valid samples collected (all analyzed).

The survey gave us insights into the major challenges people face in accessing medical care, as well as their expectations from the medical care system in the future.

¹Source: Statistics Bulletin on Health and Family Planning Development in China, 2014, Accenture Analysis



Difficulty in accessing healthcare services throughout the entire process of diagnosis and treatment

The challenges that patients face when going for medical treatments go much deeper than the inconvenience of crowded hospitals and long waiting periods. The entire process—from diagnosis to treatment—is lined with several pain points (see Figure 1). Some of the pain points that different groups of people face before, during and after treatment are:

Long queue for registration: Our survey reveals that long waiting time for registration is the No. 1 pain point for patients. When asked about the problems or unpleasant experiences they encounter when going to see a doctor, 64 percent of the respondents said "the queue for registration is too long." Those in provincial capitals and tier-1 cities show greater dissatisfaction with the long wait

for registration, with those aged 46–55 years being most unhappy about it.

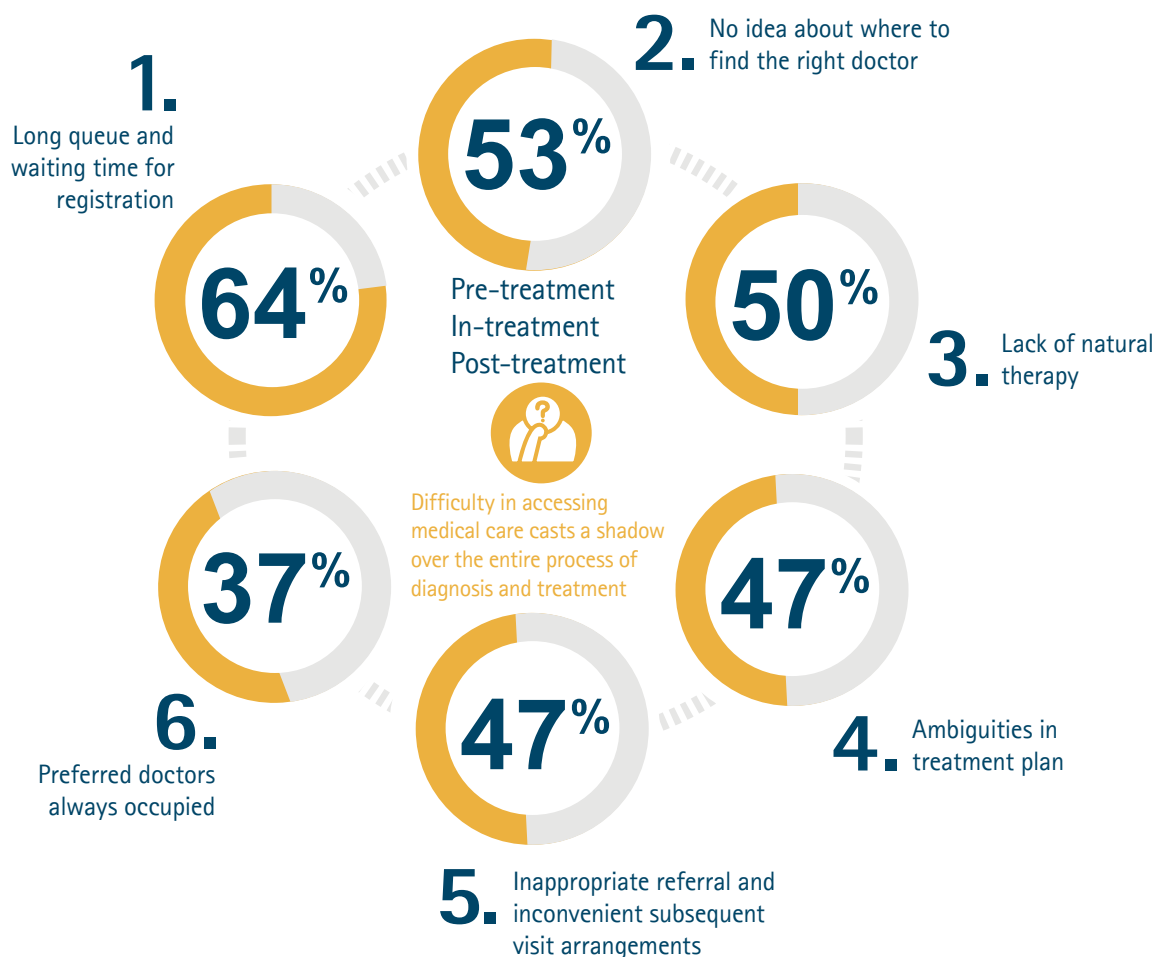
Finding the right doctor: A somewhat surprising finding is that many of the respondents are at a loss as to where to find the right doctor. As many as 53 percent of the respondents said they get confused about which hospital, clinic or department to go to. Among them, young people and those in smaller cities find it more difficult to choose a hospital or department. More than half of the respondents in the age group 18–35 years and almost half of those aged 36–45 years have this problem. Also, people in lower-tier cities other than Beijing, Shanghai, Guangzhou, Shenzhen and other provincial capitals are more likely to be confused about which hospital or department they should visit.

Ambiguity in treatment plan: About 47 percent of those surveyed complained of ambiguities in treatment plan.

Lack of natural therapy: About 50 percent of those surveyed complained about the lack of natural therapy. Patients with chronic diseases seek more support and alternatives such as natural remedies and holistic rehabilitation. They also expect better referral services, expert consultations and better subsequent visit arrangements.

In addition to these challenges, many mentioned not being able to get their preferred doctors, limited access to information on health and diseases, and concerns about sharing medical history.

Figure 1. Difficulty in accessing medical care





Preferences in medical treatment

The preferences and behavior of the Chinese when it comes to diagnosis and treatment reveal a complex mindset. This may offer insights into how the state can work towards meeting the healthcare expectations of its people.

Too much reliance on the Internet, relatives and friends. When asked about what they usually do when they feel unwell, nearly 60 percent of the respondents said they would "first go to the Internet for information about the disease and then decide whether to go to hospital." More than half of the respondents said they would "ask a doctor acquaintance, a friend or relative, and then decide whether to go to hospital."

This dependence on the Internet means that if more authoritative sources of information are made available on the Web, along with recommendations on whether to see a doctor or not and what kind of hospital people should go to, the medical system will surely be relieved to a certain extent.

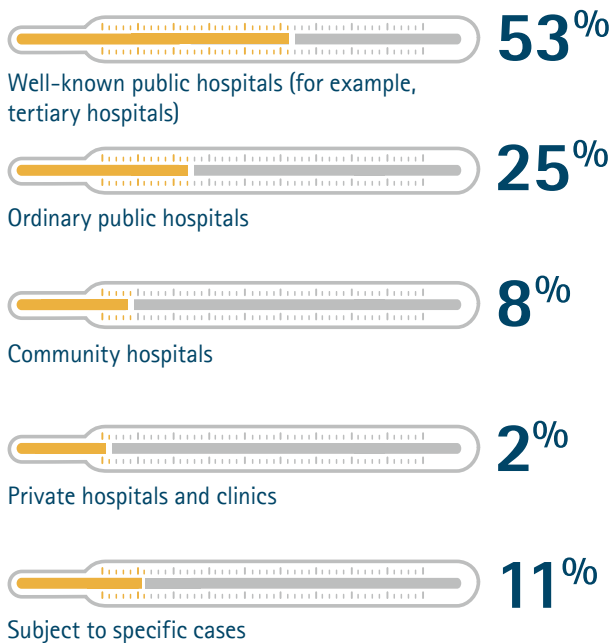
Rush for experts and famous hospitals. About 53 percent of the respondents said their first choice is a well-known public hospital, while 43 percent said they would go for select special outpatient services or expert diagnosis registration on their first visit (see Figure 2). This suggests that the government needs to work on strengthening

the people's faith in community hospitals and family doctors by enabling them to provide effective medical care.

Patients are highly suspicious of the diagnosis. As many as 67 percent of the respondents said they have been occasionally skeptical of the diagnosis, and 34 percent would selectively take the medicines prescribed by the doctor (see Figure 3). The survey shows that doubts over the diagnosis is greater among older people, stressing the need to improve their confidence in the medical care system.

Figure 2. Rush for experts and famous hospitals

Tertiary hospitals are the first choice



Patients want to see a specialist

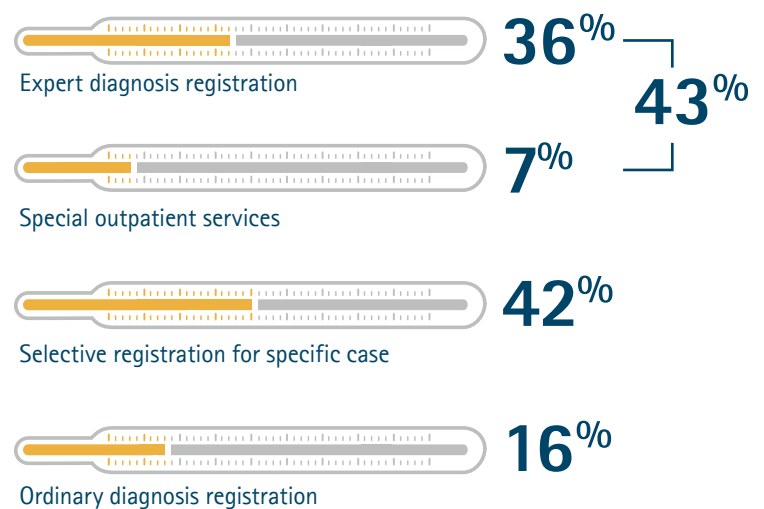


Figure 3. Highly suspicious of the diagnosis

The older, the more suspicious.





Expectations from future healthcare system

There has been some improvement in healthcare following the reforms in recent years. Since the latest round of reforms in 2009, a new medical and health care framework that focuses on four key pillars—public health services, medical services, medical security and medicine supply—has been put in place. The country's Twelfth Five-year Plan period (2011–2015) also saw a strengthening in the quality and technical management of medical treatments, improvement in efficiency, and greater adoption of medical and health information technologies. However, the pain points highlighted in our survey and people's preference for large hospitals only when it comes to healthcare indicate that medical care reforms have not been able to meet the expectations of the people. The state needs to focus on four key areas:

Improvement in the overall healthcare experience

For patients, the path to medical care is dotted with inconveniences and challenges. As far as the stages of diagnosis are concerned, 41 percent of the respondents are most dissatisfied with the "registration and queuing stage," while 19 percent complain of the diagnostic stage. About 16 percent are least content with the stage "after the start of treatment," while those who are "unable to tell what annoys them" account for 24 percent. Clearly, people are looking for a better overall healthcare experience. Making the registration process less tedious and time-consuming would create a more pleasant experience for patients.

Improvement in the hierarchical system of hospitals for diagnosis and treatment

About 65 percent of the respondents have shown their approval of the hierarchical system of hospitals for diagnosis and treatment set up by the government. But while nearly 70 percent of the patients prefer tertiary hospitals for their first hospital visit, only 8 percent of the respondents say they would choose a community hospital for initial diagnosis, citing concerns about the competency of doctors, quality of medical equipment, inadequate segmentation, availability of medicines, uncertainty of coverage (especially reimbursement option) by commercial medical insurance providers and other factors (see Figure 4). If the government wants people to have confidence in the health system, it first needs to improve the diagnosis capability and treatment provided at the grass-roots hospitals (see Figure 5).

Figure 4. Why people don't go to community hospitals

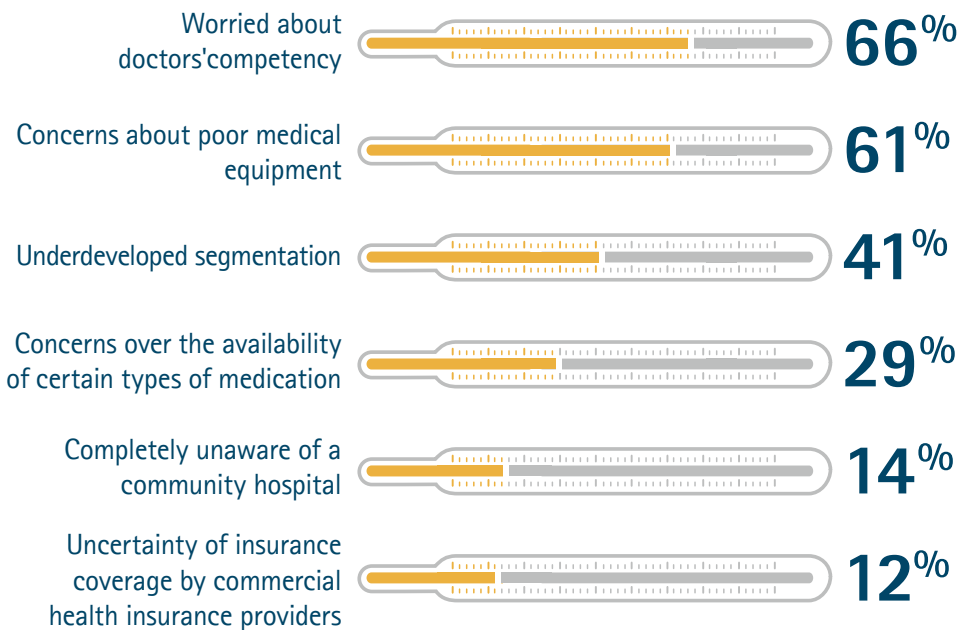
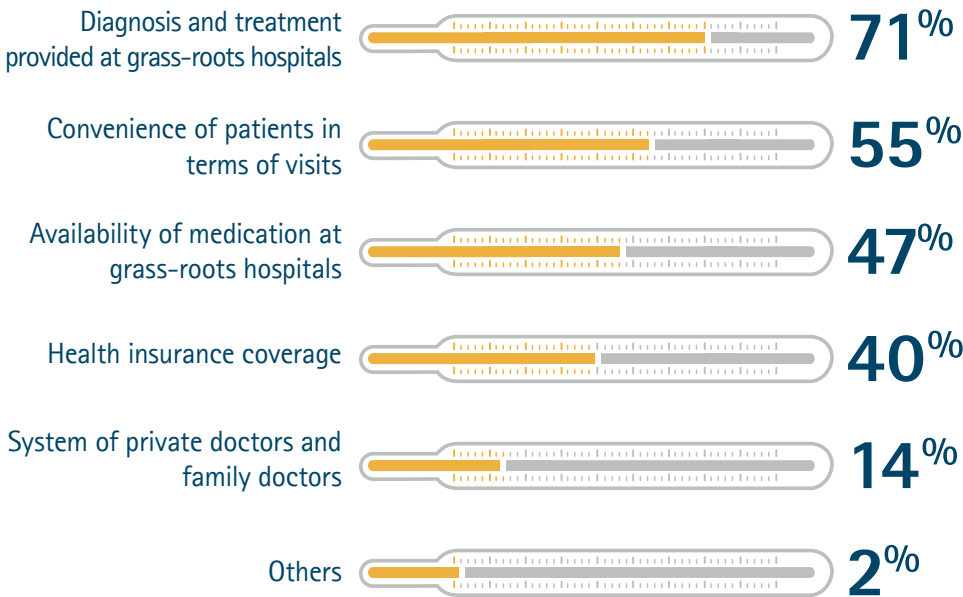


Figure 5. Areas that require attention



More personalized medical and health management services at affordable prices

People want more personalized healthcare services. As many as 87 percent of the respondents said they are interested in professional consultancy for family health management, 85 percent want dedicated personnel to arrange medical services at a time and place convenient for them, and 82 percent are interested in commercial health insurance products that cover precision health management "such as physical examination, genetic testing, and disease prevention and control" and services "such as reservation of appointments with a general or specialist practitioner, and hospitalization and surgery arrangements." And of course,

people want these services to be available at affordable prices. About 84 percent of the respondents expect high-end medical insurance covering both health management and medical services to cost not more than RMB2,000 a year.

Embrace the Internet-based medical care

Internet-based healthcare has been an emerging trend in China. The survey shows that people use the Internet to access various healthcare services and to get health-related information. Nearly 80 percent of the respondents indicate that they have registered for online healthcare services via a computer-these people also report the highest satisfaction than those who use other channels; about 70 percent

have opted for online medical services via a mobile app or WeChat; 75 percent search for medication and information on medication online; and up to 60 percent say they have used "online doctor" consulting services, of which only 5 percent said they are dissatisfied with the services.

As many as 98 percent of the respondents have shown interest in using Internet-based healthcare services in the future. The demand is greater for registration services, online medical consultation, authoritative medical information, online diagnosis, and treatment and post-treatment management (see Figure 6).

While technology-based innovative services have revolutionized healthcare in China, a number of challenges remain. For instance, while "Internet hospitals" come with various advantages—it saves patients from long waiting time; allows them to choose a convenient time to see a doctor and to select medical experts from across the country; prevents cross-infection;

gives them privacy and so on—there is a lack of awareness about Internet hospitals, and there are some concerns about them (see Figure 7) such as no direct examination, whether they would come under the health insurance/commercial insurance system, disclosure of personal information and lack of face-to-face diagnosis, etc.

Figure 6. Health services people look for online

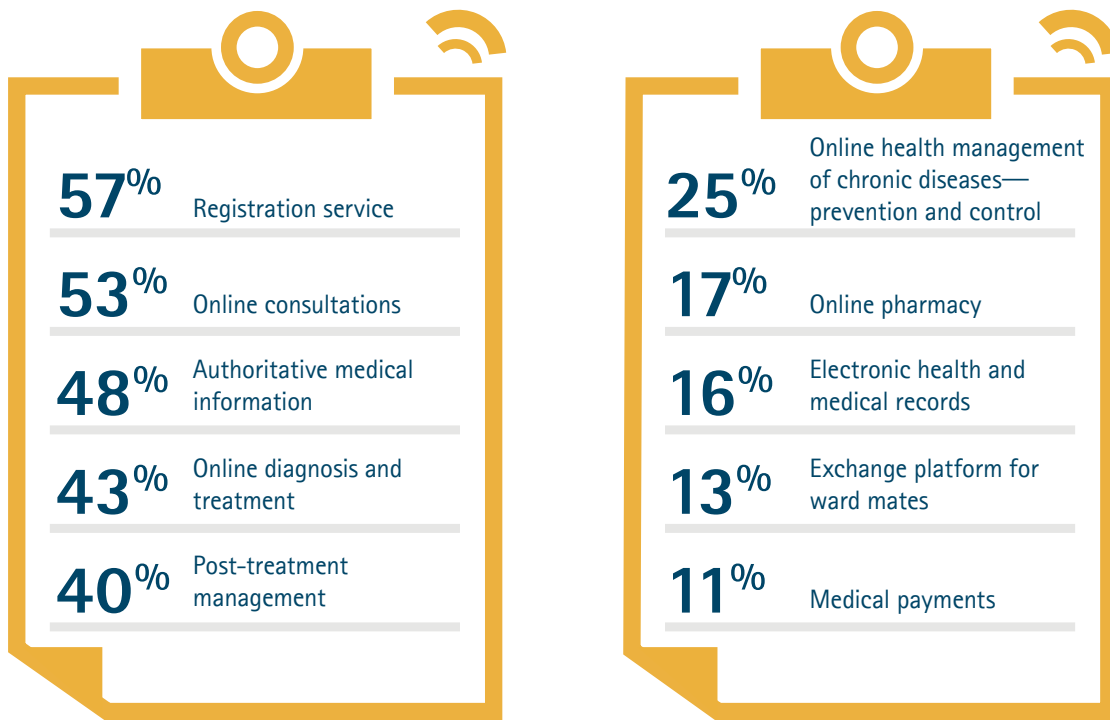
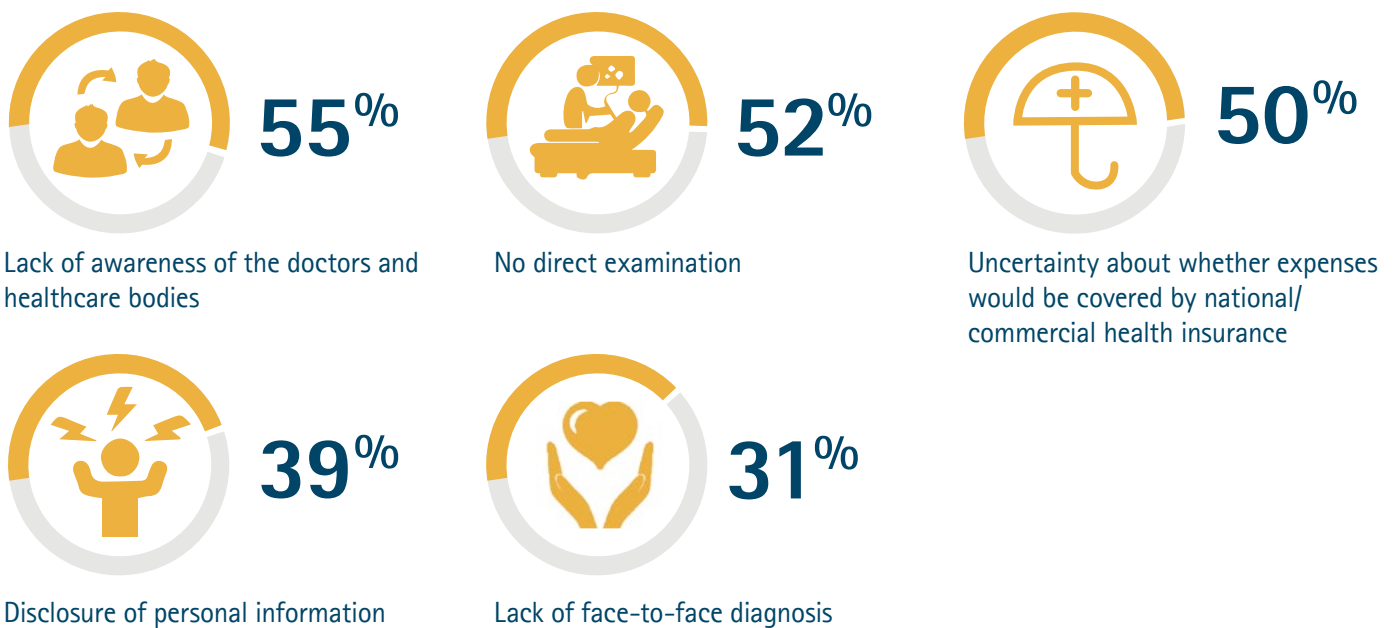


Figure 7. Concerns about Internet hospitals



Admittedly, China's medical care reforms have not yet been able to address the difficulties and inconveniences faced by patients. But the expectations of the people provide clear directions for the government to focus on as it works on improving the healthcare system.

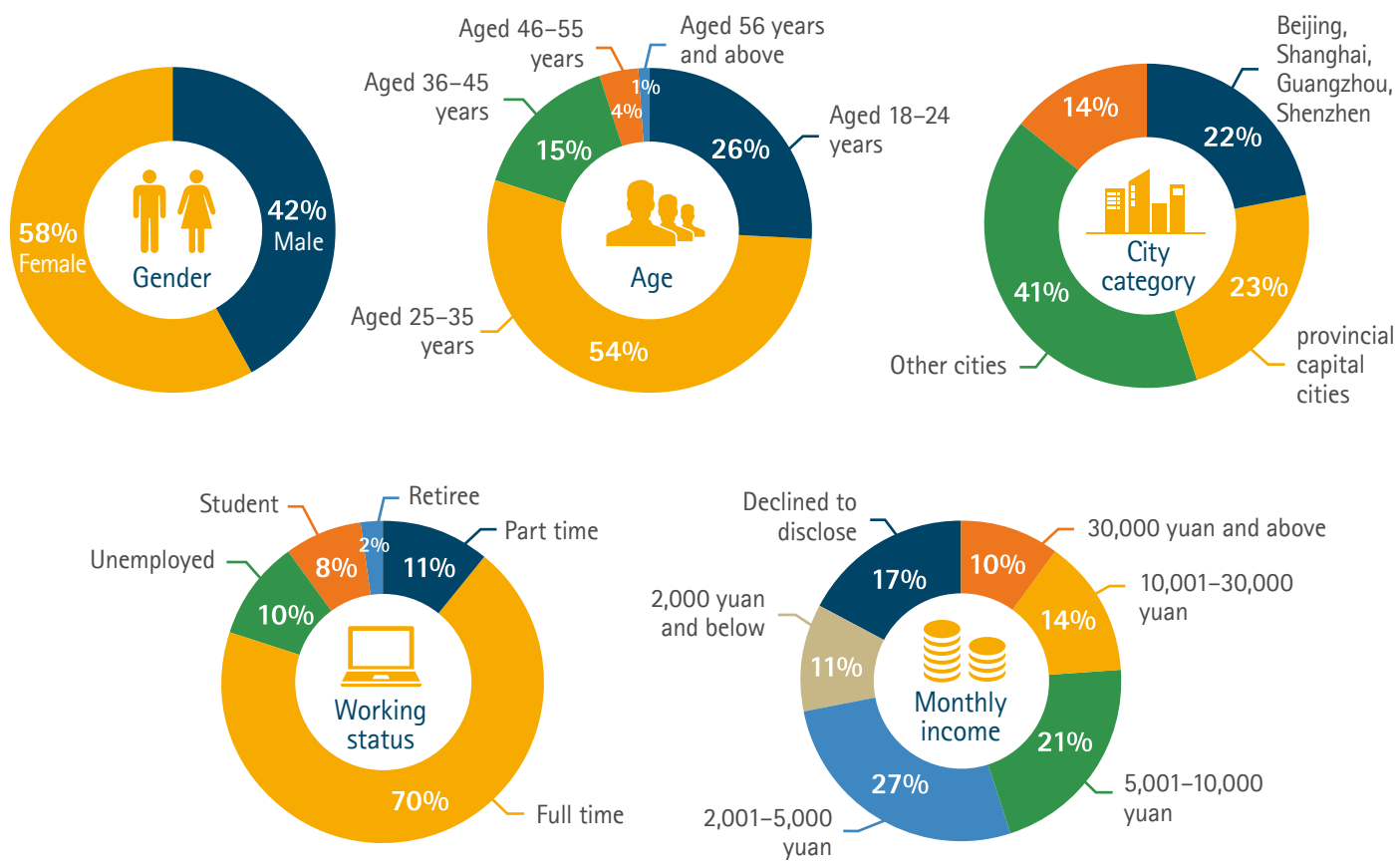
The Accenture, WeDoctor and CHPF survey gives some key insights to improve the healthcare system in China. A holistic approach or a full-node experience emerges as the top priority for reform. This will need to be complemented with reform of the hierarchical hospital system for diagnosis and treatment.

Improving information and communication on medical care on the Internet is another key requirement that will help optimize medical resources and meet the growing expectations in healthcare. Successful healthcare reform is not about having bigger hospitals, it is about meeting the needs of patients.

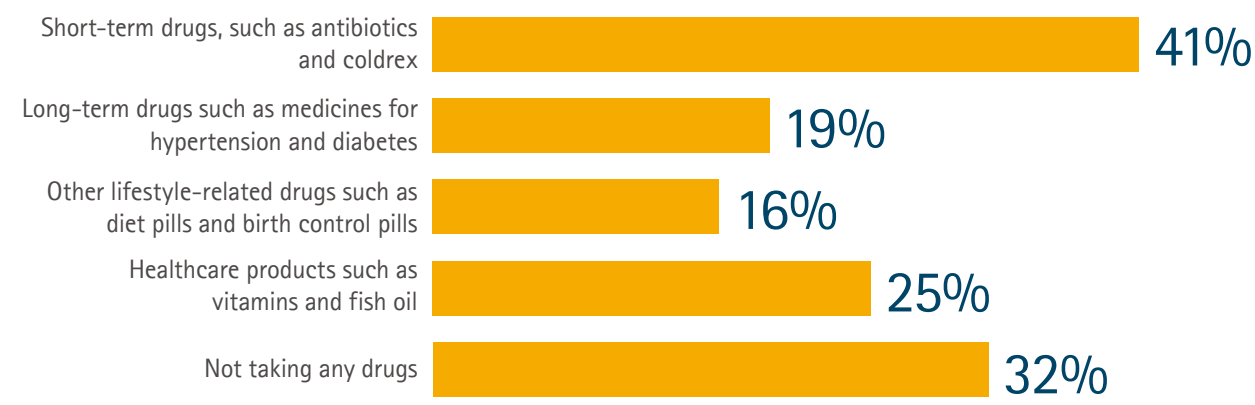
Methodology

For the survey, consumer questionnaires were collected through online and offline channels, with 12,009 valid samples obtained.

Methodology	Time	Region	Target group
<ul style="list-style-type: none"> • Online questionnaires: 91% • Pharmacy storefront interviews: 9% 	December 2015–January 2016	China Mainland	<ul style="list-style-type: none"> • Aged 18 years and above • Those who have received medical treatment in the past year



Medication use (multiple choices)



Editing and Research Team Contact

Accenture

Wei Chu, Bessie Wo, Sheryl Yu, Liu Fan,
June Wang, Zhou Mingqi, Joy Hu

WeDoctor

Aaron Tian, Hu Bin, Hedy Hua

Kher Tean Chen

Life Sciences Lead, Managing Director,
Accenture Greater China
kher.tean.chen@accenture.com

Li Fan

Senior Vice President, WeDoctor Group
lifan@guahao.com



About Accenture

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions—underpinned by the world's largest delivery network—Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With approximately 373,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives.

Accenture has been operating in Greater China for more than 25 years. Today, the Greater China practice has more than 11,000 people serving clients across the region and has offices in Beijing, Shanghai, Dalian, Chengdu, Guangzhou, Shenzhen, Hong Kong and Taipei.

For more information about Accenture, please visit its corporate homepage www.accenture.com and its Greater China homepage www.accenture.cn.

About WeDoctor

WeDoctor is a national platform for medical treatment and health consultation approved by the National Health and Family Planning Commission. Guided by the mission of "easy medical treatment for health's sake," the company aims to connect and integrate high-quality medical resources across the nation through the Internet, providing patients with reservation and registration, precision booking, online inquiry and other mobile medical services; providing doctors with a patient management tool and a peer learning platform; and working with the upstream and downstream bodies and businesses to build an ecosystem for medical services and the health industry.

As of April 2016, WeDoctor is connected with the information systems of 1,900 key hospitals in 27 provinces, with more than 110 million real-name registered users and 200,000 specialists serving in key hospitals, and with more than 7,000 teams of experts online, who have provided services to more than 500 million visitors (patients). It has rapidly grown into a professional clinic services platform and a mobile Internet health services gateway.

Please visit the official website of WeDoctor www.wu.gov.cn to know more about us.

Disclaimer: This report is produced by Accenture and WeDoctor. Survey data sources and report interpretation rights shall be owned by both parties. This document is intended for general informational purposes only. No part of the document may be copied in any form without the written consent of Accenture and WeDoctor. Accenture does not give any warranty for the accuracy and completeness of the information in this document, nor does it accept any liability for any act or omission made based on such information. The views expressed herein may be subject to change without notice.

© Copyright 2016 Accenture and WeDoctor
All rights reserved.

Accenture, its logo, and High performance. Delivered are trademarks of Accenture.
WeDoctor and its logo are trademarks of WeDoctor