

Patients and providers agree:

VIRTUAL HEALTH IS THE FUTURE OF CARE



The virtual provider is in

1 THE NEW GOLD STANDARD OF CARE IS HERE

Virtual health is no longer a niche market and instead is growing rapidly

PROJECTED
\$29B = 1.7%
in spend of total hospital and physician spend in the US

OVER
\$4.5B ↑ 29%
in venture capital investment in 2017 from 2014

2 PATIENTS ARE LINING UP

Virtual health is increasingly adopted by consumers

OVER
50% of consumers expect more online interactions with providers

76% would do a follow-up appointment virtually

Mobile health app adoption is **+3x** since 2014

33% of all consumers use wearable health tracking devices **UP FROM 9%** in 2014

3 REDUCED TURNOVER AND HIGHER EMPLOYEE SATISFACTION

Virtual health reduces burnout and improves employee satisfaction

Burnout costs
\$10-17B annually in retention, productivity, medical error, and patient experience costs

Virtual health can **SIGNIFICANTLY DECREASE** amount of physician data entry, a main cause of burnout

17% work time saved using AI-powered workflow assistant capabilities

42% lower turnover rates for nurses employed by an organization that leverages virtual health

4 IMPROVED COLLABORATION ACROSS THE HEALTHCARE CONTINUUM

Virtual health streamlines in-person encounters and improves patient-care team collaboration

eVisits take **LESS THAN 10 MINUTES** of physician time

74% of patients believe that their virtual health interaction improved their relationship with their provider

50% of referrals can be avoided by first virtually consulting a specialist

Readmission rates lowered **FROM 20.5%** **TO 10%**

5 SAVINGS ACROSS THE BOARD

Virtual health enables significant savings along the value chain

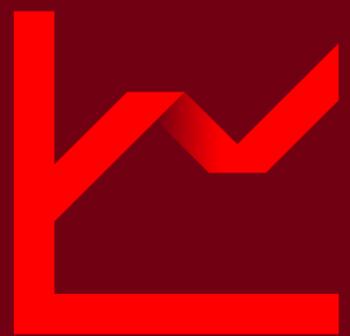
Savings of nearly **\$23B** annually by applying virtual health to annual ambulatory patient encounters

Virtual health time savings equivalent to **37000 PCPs** OR **18%** of workforce

2000 metric tons of carbon dioxide emissions saved by using telemedicine consultations

Just the beginning

The rise of virtual health has transformed consumer and health employee engagement, enabling a differentiated healthcare experience - with investment and innovation only going to increase in the future. Stay tuned for our next analytics release for insight on the skills needed to thrive in the fast-growing virtual health market.



CONTACT THE EXPERTS

Stacy Blanchard
stacy.blanchard@accenture.com
Matthew Collier
matthew.d.collier@accenture.com

CONTRIBUTORS

Lauren Farahnak
lauren.r.farahnak@accenture.com
Yvena Lesperance Atkins
yvena.l.atkins@accenture.com
Austin Shore
austin.shore@accenture.com

SOURCES

Accenture
Harvard Business Review
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Pennsylvania Homecare Association
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UC-Davis Health

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