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Insight Driven Health

Highly digital consumers are more skeptical of healthcare transparency services

Developing a deeper understanding of the evolving needs of digital health consumers will help payers and providers shape business strategies that increase consumer trust.

Despite an improvement in overall consumer trust of medical information sources over the past two years,¹ Accenture research shows that highly digital consumers—those with higher use of digital channels—are more concerned about medical information bias than their less digital counterparts. That skepticism is eroding traditionally held consumer perceptions about the professional authority of payers and providers.

However, by understanding what shapes the rising expectations of highly-digital health consumers, healthcare organisations can begin to take actions that will gain their confidence—and build the trust that secures their long-term loyalty.

Highly digital and highly skeptical healthcare consumers

Nearly every health consumer today is a digital health consumer, yet they move at different speeds and have different needs. Highly-digital health consumers use online channels, mobile devices and social media significantly more than their less digital counterparts and often search across multiple touchpoints when seeking medical information.

What's more, these highly-digital health consumers are 1.7 times more likely than less digital consumers to believe that medical information sources are not objective (64% vs. 39%). More of them believe that medical information is steering them in a preferred direction (71% vs. 55%) and more of them say that it is difficult to apply information to their own situation (58% vs. 43%). [Figure 1]

In short, highly-digital health consumers are much more informed and discerning about sources of information when it comes to medical decision-making.

The crowd and the wallet speak volumes

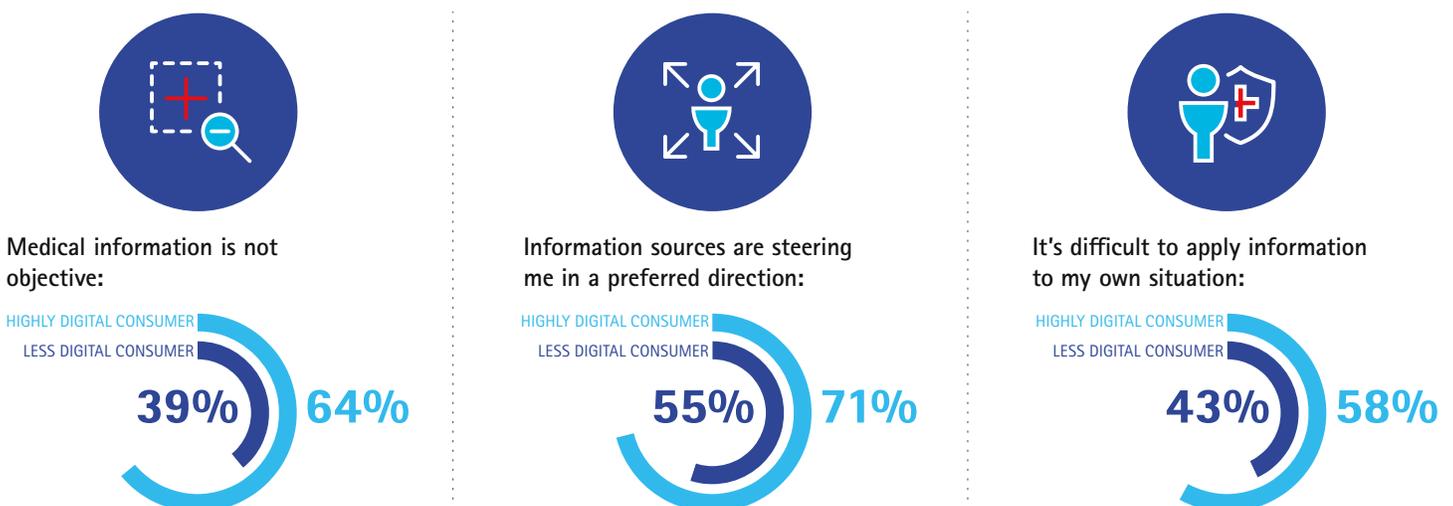
Highly-digital health consumers tend to leverage the wisdom of the crowd for medical advice. Though medical professionals remain their most important source of information, they are much less likely than their less digital counterparts to turn to such sources (51% vs. 85%). [Figure 2a] When looking for a doctor, for instance, referrals from friends and family trump those from medical professionals (45% vs. 27%) [Figure 2b]; and patient reviews are as important as provider reputation (39% vs. 38%), which has traditionally been the most important influencer. [Figure 2c] Highly-digital health consumers are also significantly more price-sensitive than less digital consumers. They are twice as likely to estimate out-of-pocket expenses in advance, for instance.

Be mindful of the end-to-end consumer journey

For all their digital intensity, highly-digital health consumers still value traditional-channel customer service: 87 percent are most likely to interact with their health plan via the phone, for example, almost as many as their less digital peers (93%). This suggests that providing healthcare transparency services that offer consistent experiences at every touch point, anytime, anywhere could be key to meeting their expectations.

Design-led thinking, which takes a consumer-need perspective and seeks to match it with what is technologically feasible, can help healthcare payers and providers meet the expectations of digital health consumers, which are expectations set by the [experiences in their daily lives](#).² By adopting a designer's sensibility when creating a consumer experience strategy, healthcare organisations can develop transparent, end-to-end customer journeys to better meet the evolving needs of the digital health consumer and win their trust.

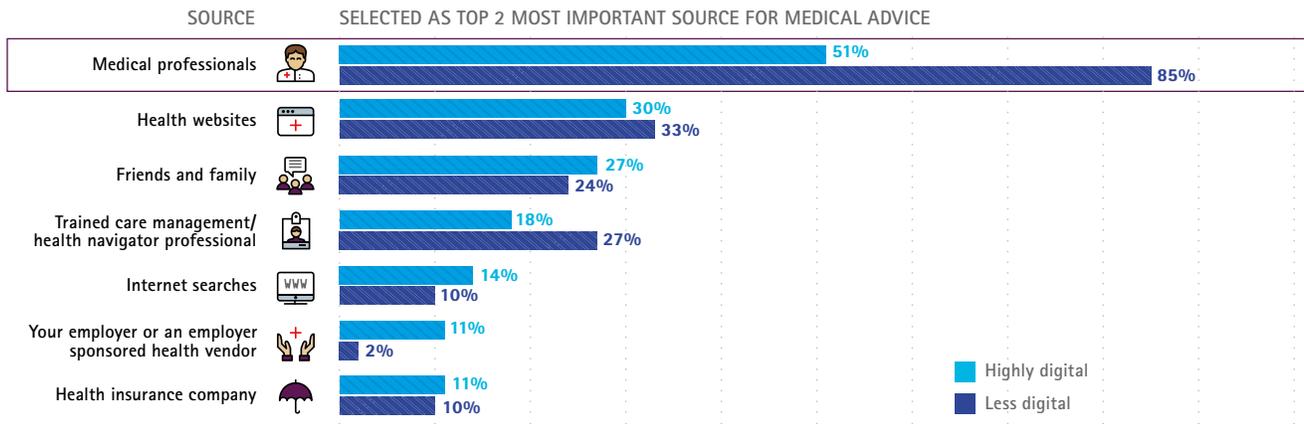
FIGURE 1: HIGHLY DIGITAL CONSUMERS ARE MUCH MORE CONCERNED ABOUT MEDICAL INFORMATION BIAS THAN THEIR LESS DIGITAL COUNTERPARTS.



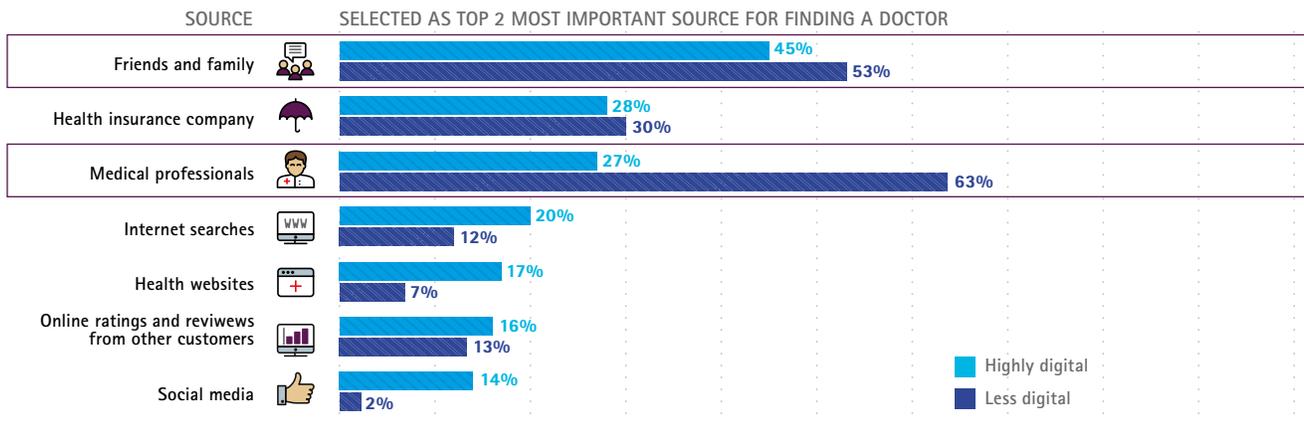
Source: Accenture 2015 Healthcare Transparency Survey

FIGURE 2: HIGHLY-DIGITAL HEALTH CONSUMERS TEND TO LEVERAGE THE WISDOM OF THE CROWD FOR MEDICAL ADVICE.

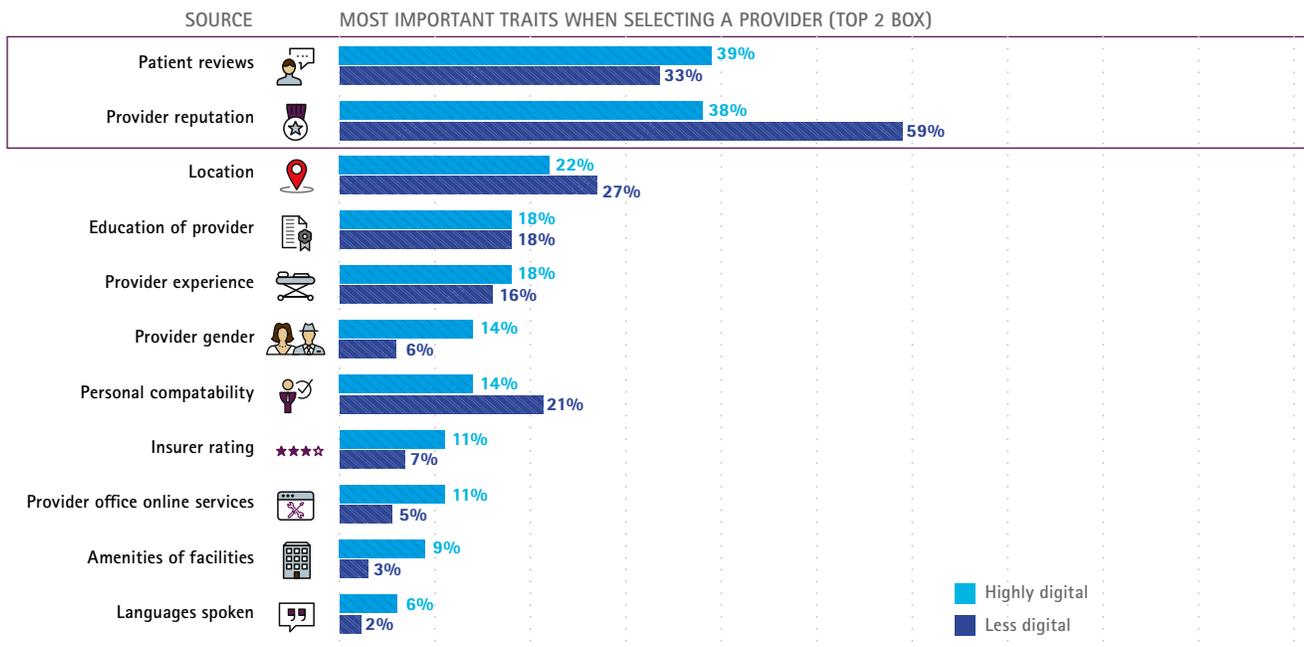
a.) When seeking medical advice, highly digital consumers rely less on medical professionals than their less digital counterparts.



b.) When finding a doctor, referrals from friends and family mean more to highly digital consumers than those from medical professionals.



c.) When selecting a doctor, patient reviews are as important as provider reputation for highly digital consumers.



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Methodology

The Accenture Healthcare Transparency Survey examines the sources of information consumers seek during their healthcare decision-making process, how they perceive these sources and the impact these sources have on purchasing decisions. Survey respondents are adults residing in the US and included a normalized sample across age, income, region, gender and insurance type. In October 2013, Accenture surveyed 2,003 respondents. In October 2015, Accenture surveyed 2,007 respondents. The calculation of consumers' "digital savviness" considers the proportion of online channels used, the proportion of time those channels are accessed via mobile device and the consumer's level of participation in social media. Consumers are considered "digitally savvy" if they score above the 75th percentile. 24 percent of the respondents to the 2015 survey are considered digitally savvy.

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