Meet Today’s Healthcare Team:

PATIENTS + DOCTORS + MACHINES

Accenture 2018 Consumer Survey on Digital Health in Australia

accenture consulting
In 2018, Australian healthcare consumers place greater significance on technology for managing their health than they did in 2016.

Several healthcare technology advancements are converging to deliver significant benefits to consumers. These include personalised care, self-management and self-directed care. According to research from Accenture, Australian healthcare consumers show strong use of digital technology for self-service care—and the numbers are rising each year.

Patients are increasingly sophisticated in their use of healthcare technology. For example, the proportion of Australian respondents using mobile phones/tablets to manage their health increased from 30 percent in 2016 to 47 percent in 2018. For the same period, the number of respondents using an electronic health record (EHR) doubled, increasing from 12 percent to 25 percent, while use of social media increased from 19 percent to 29 percent, and wearables from 19 percent to 27 percent.

There is an opportunity for providers to meet patient expectations by offering new, technologically advanced services that satisfy consumer interest and expectations. These services will help to advance a new model of care in which patients, doctors and machines work together.
Consumers are plugged in

Consumers are increasingly using self-service digital health tools that go beyond websites. Accenture research shows increases across the board in Australian consumers’ use of mobile, social media, wearables, smart scales and online communities.

Websites continue to be the most commonly used technology, with usage staying roughly stable since 2016. Meanwhile, use of mobile devices and social media has increased by about 50 percent in two years (see Figure 1).

Use of health apps and wearables is rising strongly

Australian healthcare consumers are showing that they are willing to wear technology to track their fitness, lifestyle and vital signs.

Use of wearables has quadrupled since 2014, from seven percent to 27 percent. Nearly half (47 percent) of healthcare consumers are using mobile/tablet apps, compared with just 15 percent in 2014 (see Figure 2).

*2014 survey data is unweighted.

Source: Accenture 2018
Consumers are more positive about digital health technologies

Since 2016, Australian healthcare consumers have become more positive on every measure about the use of wearable health devices, including their willingness to share data/information from wearable technology or mobile apps with a wide range of organisations. Of the Australian respondents who have accessed their EHR (16 percent), the most valuable types of information they identify are prescription medication history (53 percent), physician notes from medical visits/condition (50 percent), and lab work and blood test results (43 percent) (see Figure 3).

Consumers see wearables as beneficial for health

Healthcare consumers agree that using wearable health devices to monitor glucose, heart rate, physical activity, sleep and weight helps with:

- Understanding their health condition: 78%
- Accuracy of their medical record: 73%
- Engagement with their health: 78%
- Overall quality of care: 70%
- Monitoring the health of a loved one: 78%

Figure 3. The types of information in EHRs that most help Australians manage their health

<table>
<thead>
<tr>
<th>Information Type</th>
<th>2018 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescription medication history</td>
<td>53%</td>
</tr>
<tr>
<td>Physician notes from medical visits/condition</td>
<td>50%</td>
</tr>
<tr>
<td>Lab work &amp; blood test results</td>
<td>43%</td>
</tr>
<tr>
<td>X-rays or nuclear imaging results</td>
<td>32%</td>
</tr>
<tr>
<td>Immunization status</td>
<td>32%</td>
</tr>
<tr>
<td>Personal profile information</td>
<td>20%</td>
</tr>
<tr>
<td>Billing information</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: Accenture 2018
Consumers would choose virtual care for a variety of activities

While few patients in Australia have received virtual healthcare (just 12 percent of those surveyed), there is a strong willingness to use it for particular purposes.

Given the choice, healthcare consumers would use virtual care for a variety of activities—from e-visits to support groups.

Most notably, nearly two thirds of healthcare consumers (65 percent) would use virtual care for an after-hours appointment, and 75 percent would use it for daily support to manage an ongoing health issue. However, less than half (48 percent) would discuss a specific health concern virtually with a doctor or other healthcare provider (see Figure 4).
### Figure 5. Top advantages of virtual versus in-person healthcare services

<table>
<thead>
<tr>
<th>Virtual Healthcare Benefits</th>
<th>In-Person Healthcare Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reducing medical costs to patients</td>
<td>Providing quality care to patients</td>
</tr>
<tr>
<td>Accommodating patients’ schedules</td>
<td>Engaging patients in their healthcare decisions</td>
</tr>
<tr>
<td>Providing timely care to patients</td>
<td>Diagnosing problems faster</td>
</tr>
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</table>

**Perceived benefits of virtual care**

Australian healthcare consumers recognise the benefit of managing their health and receiving care virtually. Almost two thirds (62 percent) of healthcare consumers believe virtual care reduces medical costs to patients. Consumers also see advantages in accommodating patients’ schedules (50 percent) and providing timely care (43 percent) (see Figure 5).

At the same time, consumers perceive the top advantages of in-person care to be providing quality care to patients (70 percent), engaging patients in their healthcare decisions (51 percent) and diagnosing problems faster (49 percent).
Artificial intelligence a welcome complement to clinicians

Identified in a complementary role, rather than replacing human clinicians, artificial intelligence (AI) enjoys a high level of acceptance among Australians. Despite the fact that the research finds low AI adoption in Australia, attitudes toward the use of AI are favourable. Respondents are very open to using it to manage their health at home, for example.

An AI device to test blood at home for a variety of indicators enjoys the highest acceptance rate, with 65 percent of Australian respondents likely to use such a device. Next most popular are AI-powered virtual health assistants that help estimate costs and navigate the healthcare system (58 percent) (see Figure 6).

The advantages of AI-powered health services

Patients like the availability, time savings and personalised insights from AI. When asked whether they would use an artificially intelligent virtual doctor provided by their health service, more than half (53 percent) say they would use it because it is available whenever they need it.

Some, however, say they like visiting their doctor (34 percent), an AI-powered doctor might not understand them properly (23 percent) and they don’t understand enough about how AI works (22 percent) (see Figure 7).
Humans matter, but machines can help

When asked to imagine that their provider has given them access to new AI-powered services, respondents say they are likely to use these services for a variety of reasons: to get information after hours (63 percent), for help with navigating healthcare services (62 percent), and for advice about lifestyle habits (52 percent) (see Figure 8).

Healthcare consumers are increasingly comfortable with AI-assisted surgery. Respondents were asked to imagine they required spinal surgery to fix chronic, debilitating back pain from degenerative disc disease. In this scenario, before they are informed of the benefits, just under a third (31 percent) would prefer AI-assisted surgery and surgery planning over traditional approaches (see Figure 9). More than half (56 percent) would prefer AI-assisted surgery after learning about its benefits (these benefits were based on real clinical data).
Genetic medicine

Understanding our genetic susceptibility to disease can be simultaneously life-saving and frightening. However, fear of the unknown seems to trump fear of what the genes will reveal: just over half of Australian respondents (55 percent) would like to know their genetic susceptibility to disease, and 43 percent would like to know their estimated lifespan based on their genetic profile.

Two-thirds (65 percent) would allow their doctor to use a tool that analyses their genetic profile for health risks, and some 59 percent would add their genetic profile to their EHR (see Figure 10).

Figure 10. Consumer preference for use of genetic profile data. If you had your genetic profile available to you would you...

- ...allow your doctor to use a tool that analyzes genetic data it for health risks? [65%]
- ...add your genetic profile to your electronic health record? [59%]
- ...allow a university or public research agency to use it anonymously for research purposes? [43%]
- ...submit it anonymously to a publicly accessible online database for research purposes? [39%]
- ...allow an app or online service (provided by a technology company) to have access and analyze the data for health risks? [39%]

Source: Accenture 2018
This research suggests that emerging technologies are changing the way consumers think about managing their health.

Consumers are increasingly using digital technologies to manage their own health, they are adopting virtual care, and they see the advantages of harnessing the collective power of humans and machines.

An increased appetite for using technology to manage health risks outpacing how today’s healthcare is delivered.

Patients, machines and doctors can work together to improve the accessibility, effectiveness and affordability of healthcare.
Accenture commissioned a seven-country survey of 7,905 consumers aged 18+ to assess their attitudes toward healthcare technology, modernization and service innovation. It is the latest in a series of annual health technology surveys tracking the perspectives of consumers across themes ranging from electronic health records and health management to virtual health and cybersecurity. The online survey included consumers across seven countries: Australia (1,031), England (1,043), Finland (848), Norway (768), Singapore (957), Spain (957), and the United States (2,301). The survey was conducted by Longitude on behalf of Accenture between October 2017 and January 2018. Where relevant, the survey uses select findings from the Accenture 2016 Consumer Survey on Patient Engagement.

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