Healthcare consumers in England want a digitally enabled care experience, but they and their carers need help navigating new digital channels.
Healthcare consumers want to take control of their data

The patient experience is going digital, and consumers are leading the way by accessing electronic health records (EHRs) and using digital tools, such as wearables and apps, to manage their health. Patients have firm beliefs about who should access their data—but providers don’t always agree.

To improve patient engagement and customer satisfaction, healthcare organizations must close the gap between what patients demand and what providers deliver by investing in digital tools and strategies.
Consumers of all ages are accessing their EHR, and they know more about the data that is available to them than two years ago.

More English consumers with EHRs are accessing their records, 13% in 2016 vs 9% in 2014. Not knowing how to access records is the main barrier to adoption right now. However, both consumers (77%) and doctors (88%) feel that the patient updating of EHRs aids patient engagement with their own health.

Compared to two years ago, healthcare consumers know more about what data they can access in their EHR. In 2016, 38% with EHRs said they know what data they have access to in their EHR vs. 21% in 2014. However, 62% still don’t know what information they can access.

Among consumers who know what information they have access to, 40% say prescription medicine history, lab work and blood tests are most helpful, while 22% say having physician notes is most helpful (see Figure 4).

Source: Accenture 2016
Doctors and consumers don't always agree on what a patient should access in his/her EHR.

Most (81%) patients believe they should have full access to their records, while only 22% of physicians share this belief. Interestingly, about one quarter (26%) of patients report they have full access (see Figure 5).
Most (72%) patients who favor patient access want to see exactly what the doctor sees—not a summary. They also want the ability to update their records, such as with their demographic information (70%), family medical history (76%) and new symptoms (74%). Healthcare consumers and doctors are in agreement that patients should be able to update most information in his/her EHR (see Figure 6).

Consumers have strong views on who should access their EHR data. They view their EHR as a tool for their primary doctor (71%) or themselves (56%), not to be accessed by others, unless they provide permission (35%). Very few consumers believe their employer (3%), government (3%) or a retail clinic (6%) should be able to access their health record (see Figure 7).

Source: Accenture 2016
Consumers’ use of apps and wearables has trebled, and both doctors and patients agree there are benefits.

Use of health apps has trebled in the past two years (36% in 2016 vs. 13% in 2014) among consumers who use technology to manage their health. Use of health wearables has also trebled (20% in 2016 vs. 6% in 2014) (see Figure 8). Use of social media for health management has increased from 9% to 21%.
Individuals aged 35-44 are the most prevalent users of both apps (55%) and wearables (28%). The most popular among all app users are Fitness (52%) and Diet/Nutrition (44%) apps (see Figure 9).

Both English consumers (65%) and doctors (86%) agree that using wearables helps a patient engage in their health (see Figure 10).

Despite a proliferation of mobile health app use, there is a dip (across more than half the countries surveyed) in patients’ perception that digital health technologies help them understand their own conditions. Providers will need to investigate why.

Source: Accenture 2016
Consumers are willing to track their health using digital tools, and share the data with healthcare professionals.

The majority (73%) of healthcare consumers wear or are willing to wear technology to track their lifestyle and/or vital signs (see Figure 11). Of consumers who were asked by a doctor to wear technology to track their fitness and lifestyle (15%) or vital signs (19%), roughly three-fourths (74%) of patients followed the physician's recommendation (see Figure 12).

Most consumers are willing to share wearable or app data with a doctor (84%) or nurse (79%). Willingness to share wearable or app data drops when it comes to health plans (41%) or employers (26%) (see Figure 13).
Willingness to wear health technology can also offer data to be used in virtual visits—visits that are increasing in popularity due to convenience and cost advantages.

English healthcare consumers and doctors agree that virtual visits offer lower costs (46% of consumers vs. 59% of doctors) for patients, but patients perceive quality of care as a main advantage of in-person visits. Also, 25% of doctors in England feel that patients’ use of wearables might actually increase the cost of healthcare – almost as large as the proportion (31%) who believe it will reduce healthcare costs. It is important to find out why.
Consumers' speed of digital adoption in the past two years is significant, illustrating that patients are leading the way in using digital tools to manage their health. Access to EHRs is increasing significantly, however there is a gap between physician and patient expectations on the level of access to this information. There is an opportunity for physicians to increase the level of transparency and improve communications with patients.

Health system stakeholders that invest in digital tools and develop strategies to adapt to consumers' expectations will develop service design related strategies that help to integrate these tools into patients' and carers' lives, and close the gap between what patients demand and what health system stakeholders deliver.
Accenture 2015 Consumer Survey on Patient Engagement

Accenture commissioned a seven-country survey of 7,840 consumers ages 18+ to assess their attitudes toward health, the healthcare system, electronic health records, healthcare technology and their healthcare providers’ electronic capabilities. The online survey included consumers across seven countries: Australia (1013), Brazil (1006), England (1009), Norway (800), Saudi Arabia (852), Singapore (935) and the United States (2225). The survey was conducted by Nielsen on behalf of Accenture between November 2015 and January 2016. The analysis provided comparisons by country, sector, age and use. Where relevant, the survey uses select findings from the 2015 Accenture Doctors Survey to compare the doctor and consumer responses.

* Numbers in the figures may not add to 100% due to rounding.

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