Insight Driven Health

Accenture Consumer Survey on Patient Engagement

Research Recap: United States

September 2013
Executive Highlights: Overview

• Accenture conducted an online survey of 9,015 adults, 18+ across nine countries: Australia, Brazil, Canada, England, France, Germany, Singapore, Spain and the United States.

• 1,000 adults in the US participated in the survey, which assessed the general public's attitudes towards their medical providers’ electronic capabilities, as well as the capabilities of their current providers.

• The survey was conducted between July 25 -31, 2013.

• The analysis provided comparisons by country. This report includes summary and detailed findings for the US. Cross-country comparative results are discussed in the global report.

• See slide 10 for demographic information.
Executive Highlights: Key Insights

• **Medical providers’ electronic capabilities are important to most US consumers.**
  – Between 69% and 82% of consumers say that electronic capabilities are at least somewhat important, and about one-third (34%) to one-half (48%) say that these are very important.
  – Of the surveyed capabilities, consumers most commonly report that access to medical records is important (somewhat/very) (82%). About three-quarters say booking appointments online (77%), requesting prescription refills electronically (76%), and receiving reminders via email and text (74%) are important. Communicating with providers via email is important to slightly fewer (69%).
  – These preferences vary by age group. For example, 18-24 year-olds are more likely to say booking appointments (53%), receiving reminders (41%) and communicating via email (41%) are very important, compared with consumers age 55+ (33%, 23% and 26% respectively).

• **Many US consumers are actively tracking information about their health.**
  – Consumers most commonly track their health history (37%), followed by their physical activity or diet (34%) and health indicators such as weight and blood pressure (33%). Fewer consumers track their symptoms (26%).
  – 43% do not actively track any of the surveyed health characteristics.

• **More than one-third (36%-48%) of US consumers say that their current medical providers have electronic capabilities.**
  – Consumers say they can request prescription refills (48%), access medical records (43%), make appointments online (43%), email with providers (36%) and receive electronic reminders (36%) with their current providers.
  – Between 28% and 40% of doctors say these electronic services are available to their patients.
The majority of US consumers (69%-82%) say that it is at least somewhat important for their providers to have electronic capabilities. About four out of five consumers (82%) say that accessing medical records electronically is at least somewhat important. Nearly half of consumers (48%) say that this is very important.

**Importance of medical providers’ electronic capabilities**

- **Access your medical record**: 10% Not at all important, 8% Not very important, 34% Somewhat important, 48% Very important, 82% Very/somewhat Important (net)
- **Book/change/cancel appointments**: 11% Not at all important, 11% Not very important, 35% Somewhat important, 42% Very important, 77% Very/somewhat Important (net)
- **Request prescriptions refills electronically**: 12% Not at all important, 12% Not very important, 37% Somewhat important, 39% Very important, 76% Very/somewhat Important (net)
- **Receive reminders, via email or text message**: 14% Not at all important, 12% Not very important, 40% Somewhat important, 34% Very important, 74% Very/somewhat Important (net)
- **Communicate with your medical provider through secure email**: 16% Not at all important, 15% Not very important, 35% Somewhat important, 34% Very important, 69% Very/somewhat Important (net)

More 18-24 year-olds say booking appointments (53%), receiving reminders (41%), and communicating via email (41%) are very important, compared with 33%, 23% and 26% of consumers age 55+.

Base: All Qualified Respondents
Q705 How important is it to you personally that each of the following electronic capabilities is offered by your medical provider where you receive medical care?
For each surveyed health characteristic, about one-quarter (26%) to one-third (37%) of US consumers track their health information. For example, 37% say they track their health history. Overall, fewer than half (43%) do not actively track any of the surveyed health information.

% Tracking Health

- Health history (current Rx list, allergies, care professionals): 37%
- Physical activity or diet: 34%
- Health indicators (weight, blood glucose, blood pressure): 33%
- Symptoms (headaches, sleep patterns, pain): 26%
- Doesn't actively track any of these: 43%

Base: All Qualified Respondents
Q710 Do you currently actively track (i.e., write it down/store online or offline) your own...? Please select all that apply.
Nearly half of US consumers (48%) can request prescription refills electronically. Slightly fewer (43%) say they can book appointments or access medical records online. Interestingly, many consumers (41%) without online access to medical records would consider switching to a provider who offers access.

**Electronic capabilities of current provider**

<table>
<thead>
<tr>
<th>Capability</th>
<th>Yes</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to medical record</td>
<td>43%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Request Rx refills electronically</td>
<td>48%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Communicate through secure email</td>
<td>36%</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>Receive reminders, via email or text message</td>
<td>36%</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>Book/change/cancel appointments</td>
<td>43%</td>
<td>35%</td>
<td>22%</td>
</tr>
</tbody>
</table>

25-34 year-olds are more likely to consider switching providers (55%) than those ages 45-54 (37%) or 55+ (20%).

Would you consider switching to a physician who offers online access to your medical record?

- Yes: 41%
- No: 59%
Between about one-quarter (28%) and 40% of doctors say electronic capabilities are available to their patients. About one-third (36%) to almost half (48%) of consumers say their current providers offer these same capabilities.

<table>
<thead>
<tr>
<th>Electronic capabilities, consumers and doctors compared</th>
<th>Doctors</th>
<th>Consumers</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access medical record</td>
<td>28%</td>
<td>43%</td>
<td>7%</td>
</tr>
<tr>
<td>Request Rx refills</td>
<td>40%</td>
<td>48%</td>
<td>7%</td>
</tr>
<tr>
<td>Communicate through secure email</td>
<td>39%</td>
<td>36%</td>
<td>5%</td>
</tr>
<tr>
<td>Receive reminders</td>
<td>31%</td>
<td>36%</td>
<td>14%</td>
</tr>
<tr>
<td>Book appointments</td>
<td>29%</td>
<td>43%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: All Qualified Respondents
Q715: Does your medical provider offer the following capabilities electronically? (Consumers)
Q740: Are the following functions available to your patients electronically? Can they (...)? (Doctors)
US consumers who consider it important (very/somewhat) to have electronic access to their medical records are 3.5 times more likely to switch providers to gain access (52%) compared to those consumers who do not find it to be important (at all/very) (13%).

Likelihood to switch provider to gain access to medical records

Would you consider switching to a physician who offers online access to your medical record?

- No: 59%
- Yes: 41%

Among consumers who consider access to medical records **very/somewhat important**
- 52%

Among consumers who consider access to medical records **not very/not at all important**
- 13%

Base: All Qualified Respondents
Q705 How important is it to you personally that each of the following electronic capabilities is offered by your medical provider where you receive medical care?
Base: Provider does not offer access to medical information
Q720 Would you consider switching to a physician who offers online access to your medical record?
About four out of five consumers say they *should* have full access to their electronic health record (EHR), but only about one-third (36%) say they actually *do have* full access. The majority of doctors (65%) say patients should have *limited* access.

### Level of patient access to electronic health record (EHR)

- **Full access**
  - Doctors: Should Have: 31%
  - Patients: Should Have: 36%
  - Patients: Do Have: 84%
  - Consumers age 35-44 are more likely to say they should have full access (89%) than those age 25-34 (78%).

- **Limited access**
  - Doctors: Should Have: 14%
  - Patients: Should Have: 27%
  - Patients: Do Have: 65%

- **No access**
  - Doctors: Should Have: 4%
  - Patients: Should Have: 2%
  - Patients: Do Have: 37%

Almost half of consumers age 45-54 (46%) and 55+ (45%) say they do not have access to their EHRs. By contrast, only about one-quarter of younger consumers age 18-24 (28%) and 25-34 (25%) say they do not have access.

Base: All Qualified Respondents
Q710 What level of access should a patient have to his or her electronic personal health record? (Doctors)
Q725 What level of access should you as a patient have to your electronic medical record, created by your physician? (Consumers)
Q730 What level of access do you as a patient have to your electronic medical record, created by your physician? (Consumers)
### Demographics

<table>
<thead>
<tr>
<th></th>
<th>US (n=1,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>47%</td>
</tr>
<tr>
<td>Female</td>
<td>54%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td>47.6</td>
</tr>
<tr>
<td><strong>Health status</strong></td>
<td></td>
</tr>
<tr>
<td>Been told by doctor in the past 2 years that have a chronic illness</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
</tr>
<tr>
<td>HS Graduate or less</td>
<td>25%</td>
</tr>
<tr>
<td>Some College</td>
<td>23%</td>
</tr>
<tr>
<td>Associates Degree</td>
<td>12%</td>
</tr>
<tr>
<td>College 4 years</td>
<td>23%</td>
</tr>
<tr>
<td>Post Graduate</td>
<td>17%</td>
</tr>
<tr>
<td>HS Graduate or less</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td></td>
</tr>
<tr>
<td>$0 - $24,999</td>
<td>24%</td>
</tr>
<tr>
<td>$25,000 to $49,999</td>
<td>29%</td>
</tr>
<tr>
<td>$50,000 to $74,999</td>
<td>20%</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>11%</td>
</tr>
<tr>
<td>$100,000 or over</td>
<td>12%</td>
</tr>
<tr>
<td>Decline to answer</td>
<td>4%</td>
</tr>
</tbody>
</table>

Note: Unweighted Data
Base: All Qualified Respondents

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