Healthcare consumers in the United States want a digitally enabled care experience, and they are initiating it with greater use of digital tools and electronic health records.
Healthcare consumers are taking 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 US consumers with EHRs are accessing their records, 45% in 2016 vs. 27% in 2014 (see Figure 1). Health technology users age 65-74 are most likely to have turned to their EHRs to manage their health (38% did so in 2016 vs. 22% of those 18-34) (see Figure 2).

Compared to two years ago, healthcare consumers know more about what data they can access in their EHR. In 2016, 65% with EHRs said they know what data they have access to in their EHR vs. 39% in 2014. However, 35% still don’t know what information they can access (see Figure 3).

Interestingly, those patients who have accessed their EHR are doing so to stay informed (41%), but not for help with making medical decisions (6%). Among consumers who know what information they have access to, 41% say accessing lab work and blood test results is most helpful for managing health, while 24% say having physician notes is most helpful (see Figure 4).

Source: Accenture 2016
Most (92%) patients believe they should have full access to their records, while only 18% of physicians share this belief. Interestingly, about half (49%) of patients believe they have full access (see Figure 5). The perception gap about EHR access has widened in the past two years, a 42% decline in physicians and a 10% rise in patients.
Most (77%) 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 (86%), family medical history (89%) and new symptoms (87%). 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 (75%) or themselves (67%), not to be accessed by others, unless they provide permission (52%). Very few (3%) consumers believe their employer, government (3%) or a retail clinic (9%) should be able to access their health record (see Figure 7).

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

Use of health apps has doubled in the past two years (33% in 2016 vs. 16% in 2014) among consumers who use technology to manage their health. Use of health wearables has also doubled (21% in 2016 vs. 9% in 2014) (see Figure 8). The use of social media has increased from 14% to 21%.
Individuals aged 18-34 are the most prevalent users of both apps (48%) and wearables (26%). The most popular among all app users are Fitness (59%) and Diet/Nutrition (52%) apps (see Figure 9).

Both US consumers (77%) and doctors (85%) agree that using wearables helps a patient engage in their health (see Figure 10).

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

The majority (78%) 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 (18%) or vital signs (19%), roughly three-fourths (76%) of patients followed the physician's recommendation (see Figure 12).

Most consumers are willing to share wearable or app data with a doctor (90%) or nurse (87%)—and 40% of health app users have already done so. Willingness to share wearable or app data drops when it comes to health plans (63%) or employers (31%) (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.

Healthcare consumers and US doctors agree that virtual visits offer lower costs (58% of consumers vs. 62% of doctors) and convenience (52% consumers vs. 80% doctors) for patients, but patients perceive quality of care as a main advantage of in-person visits. Twenty-nine percent of healthcare consumers now say they prefer remote to in-person visits, a small increase from 23% in 2014.

Source: Accenture 2016
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.

Providers that invest in digital tools and develop strategies to adapt to consumers' expectations will close the gap between what patients demand, and what providers deliver.
Accenture 2016 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 2016 Accenture Doctors Survey to compare the doctor and consumer responses.

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

For more information:
Kaveh Safavi, M.D., J.D.
kaveh.t.safavi@accenture.com

Rick Ratliff
richard.ratliff@accenture.com

Kip Webb, M.D., M.P.H.
kip.webb@accenture.com

Linda MacCracken
linda.maccracken@accenture.com

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