



Insight Driven Health

Accenture 2016 Consumer Survey on Patient Engagement

US Report



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Overview

- 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 seven-country survey was conducted by **Nielsen** on behalf of Accenture between **November 2015 and January 2016** (The US survey was conducted online between November 13 and December 2, 2015).
- 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.



Method

With whom did Accenture work to conduct the quantitative survey?

Accenture worked with Nielsen, who was responsible for the entire project including recruitment, screening of respondents, questionnaire development, analysis and report development.

Who was surveyed?

Approximately, n=7840 consumers total, ages 18+, in the US, Australia, Brazil, England, Norway, Saudi Arabia, Singapore, and the US who agreed to take part in the survey. This report includes results for US respondents only (n=2225).

How did Accenture recruit study participants?

In the US, respondents were contacted through direct email invitations and notifications; respondents are able to follow a unique link to the survey and complete it anonymously. Similar methods were used in other countries.

Are we confident in the quality of the respondents and that they meet the study criteria?

All participants are consumers, ages 18+, residing in the countries specified and nationally representative on age and gender. Participants' details are double verified and were rescreened for this study to ensure participant quality.

Was the questionnaire translated into the appropriate native language?

Yes, the survey was translated into: Portuguese (Brazil); Norwegian (Norway); Arabic (Saudi Arabia). English (localized) was used for England, Australia, Singapore, and Saudi Arabia (English and Arabic options offered).

What did we do to ensure balance and a representative sample?

In the US, data were weighted by education, age by sex, race/ethnicity, region, and income to be nationally representative of the general population. However, because 2014 data were not weighted, all data for trended questions are not weighted. This is indicated on each slide.

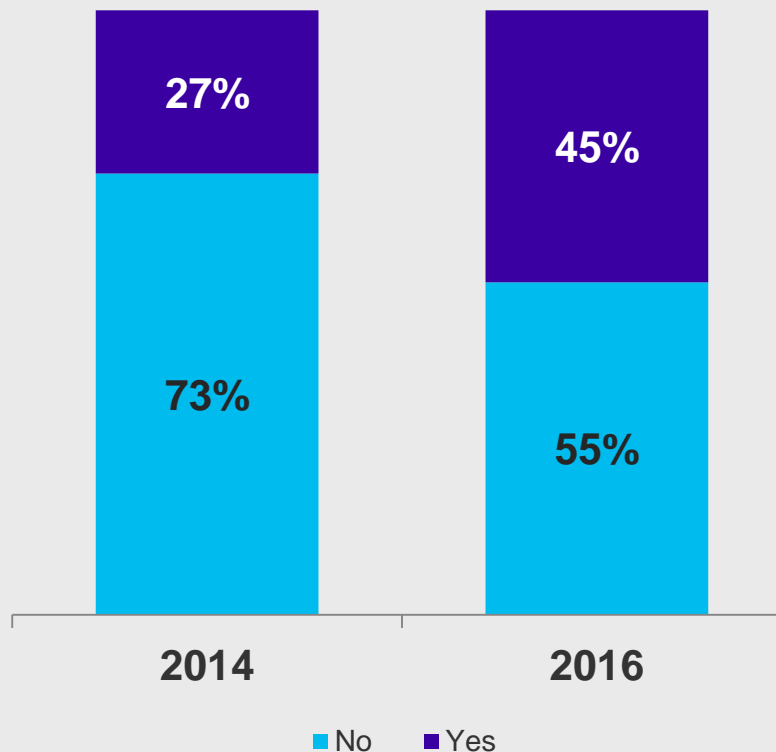
Research Results: Key Findings



More consumers with EHRs have accessed their records



Have Ever Accessed EHR



BASE: HAS EHR (2014 n=1585;2016 n=1654)

Q820 (Q158) Have you ever accessed your electronic health records?

NOTE: unweighted data

Top users of EHRs are consumers 65-74 and the use of apps, wearables, and social media to manage health is more pronounced with consumers 18-44



Technology or Electronic Health Management Tools Used

					PRE-MEDICARE	MEDICARE	OLDER MEDICARE
	US TOTAL	18-34	35-44	45-54	55-64	65-74	75+
Websites	57%	54%	56%	58%	61%	55%	56%
Mobile phone/tablet app	33%	48%	37%	30%	19%	16%	2%
Electronic health records	27%	22%	23%	29%	32%	38%	31%
Wearable technology	21%	26%	25%	21%	15%	9%	9%
Social media	21%	32%	19%	21%	13%	9%	7%
Smart scales	13%	20%	16%	8%	11%	5%	4%
Remote consultation	12%	11%	13%	9%	11%	18%	11%
Online support communities	12%	16%	11%	13%	10%	6%	9%
Remote monitoring	8%	13%	8%	5%	6%	5%	7%
Other	2%	1%	0	3%	2%	2%	2%
None	10%	7%	6%	10%	13%	18%	20%

AGE BREAKS

BASE: USES TECHNOLOGY TO MANAGE HEALTH

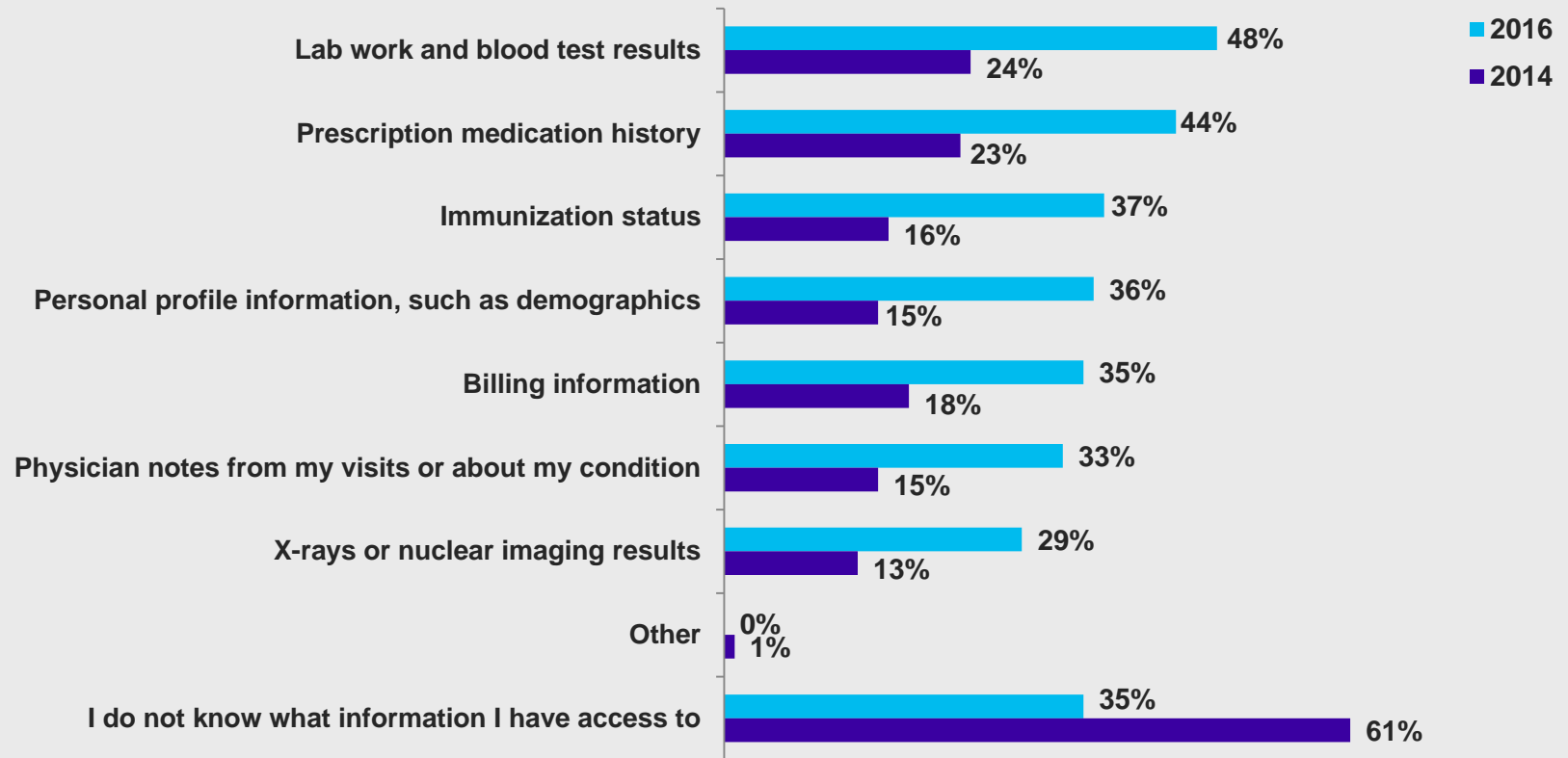
Q625 (Q126) Which of the following technology or electronic health management tools have you used to manage your health in the past year?

NOTE: unweighted data

Consumers with EHRs are more certain of what data are in their records; lab work and prescription history are most commonly available



EHR Data Have Access To



BASE: HAS EHR (2014 n=2011; 2016 n=1654)

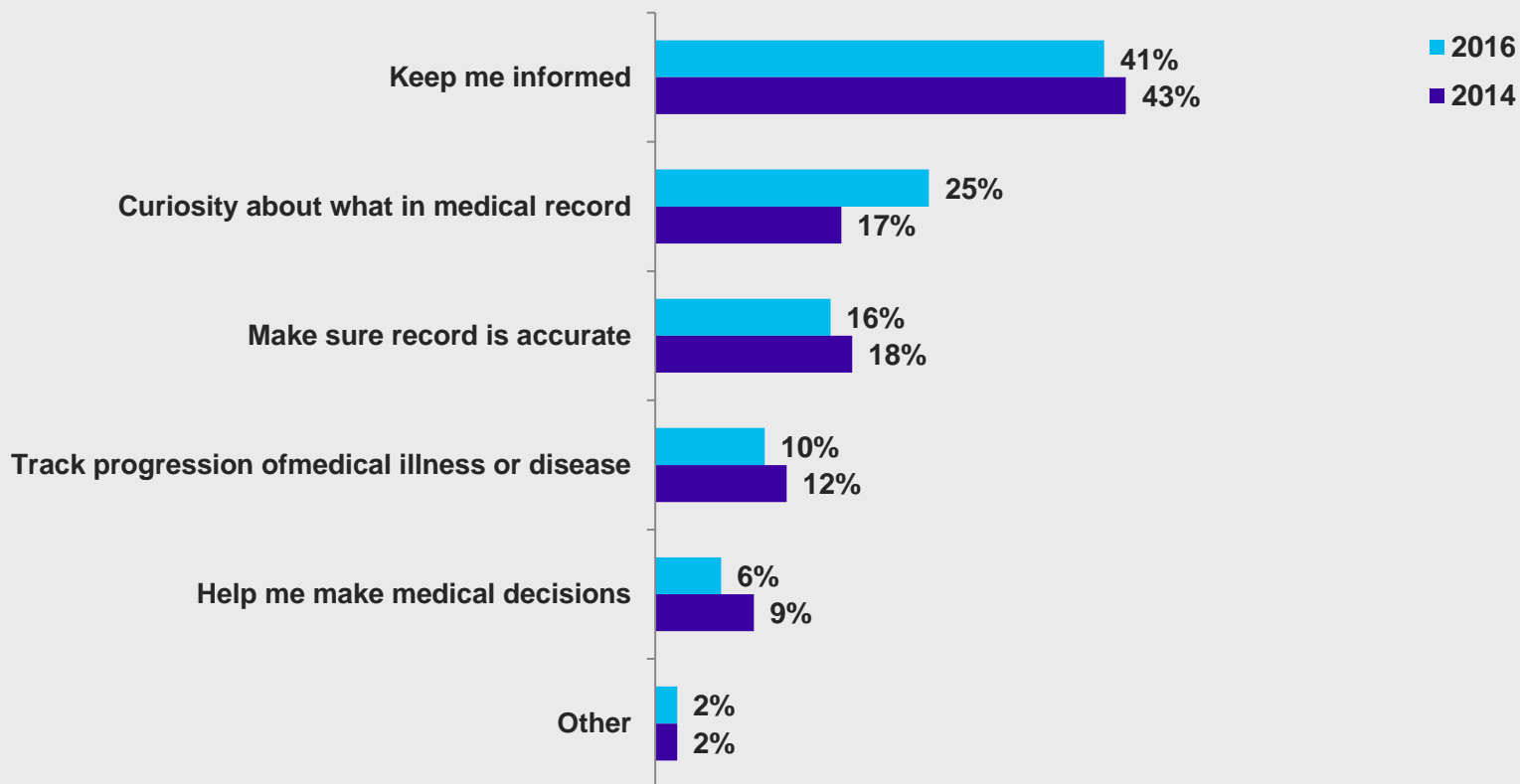
Q845 (Q160) Which of the following data in electronic health records do you have access to?

NOTE: unweighted data



US consumers access their EHRs to stay informed

Primary Reason Access EHR



BASE: HAS ACCESSED EHR (2014 n=434;2016 n=738)

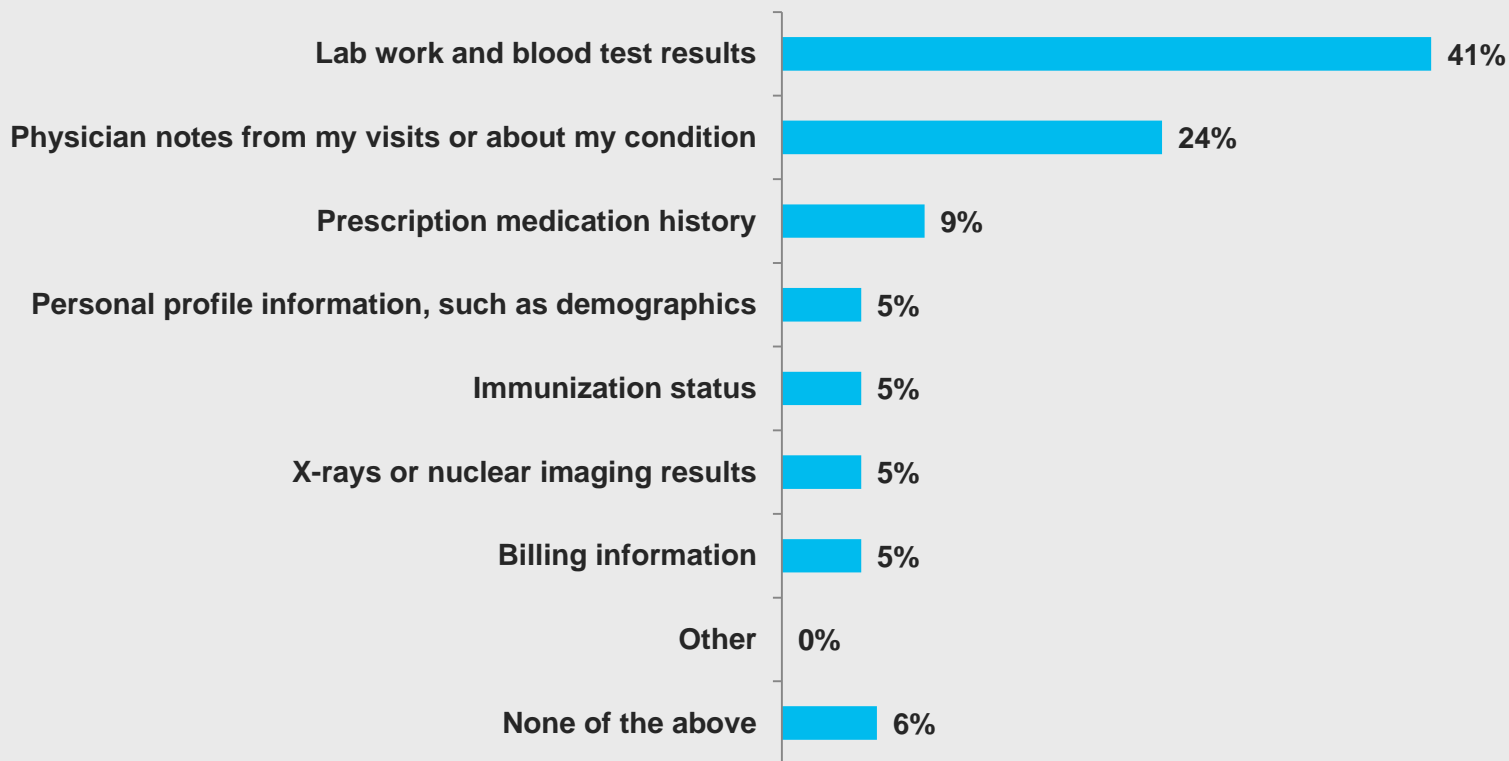
Q821 (Q169) What is the primary reason you access your electronic health records?

NOTE: unweighted data

Lab work and blood test results in EHRs are most helpful for managing health

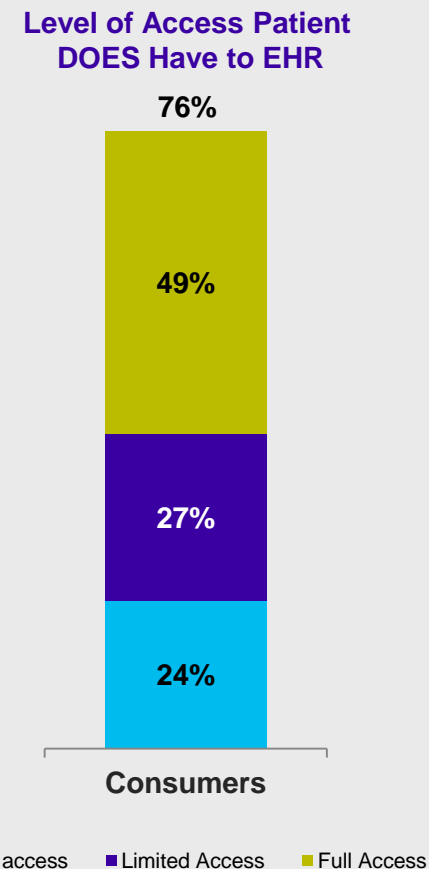
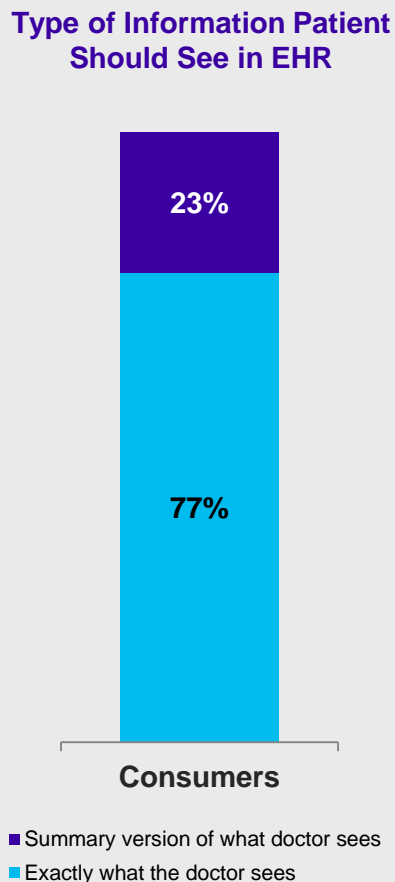
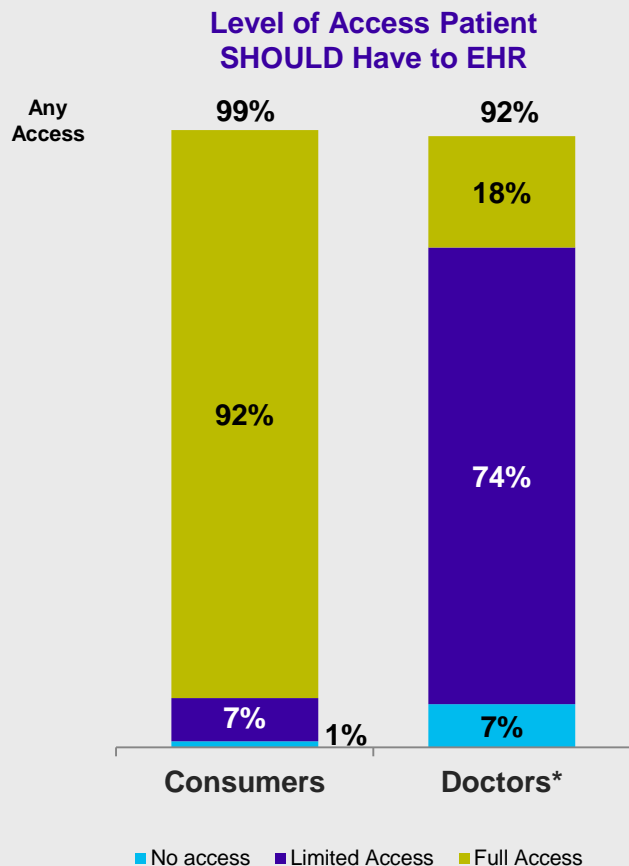


EHR Data that Most Helps Manage Health



BASE: KNOWS WHAT DATA HAVE ACCESS TO IN EHR, HAVE ACCESS TO MULTIPLE TYPES OF DATA; 2016 (n=906)
Q850 Which of the following types of information in your electronic health record most helps you manage your health?

Consumers want more access to their EHR than they currently have and than doctors are willing to give



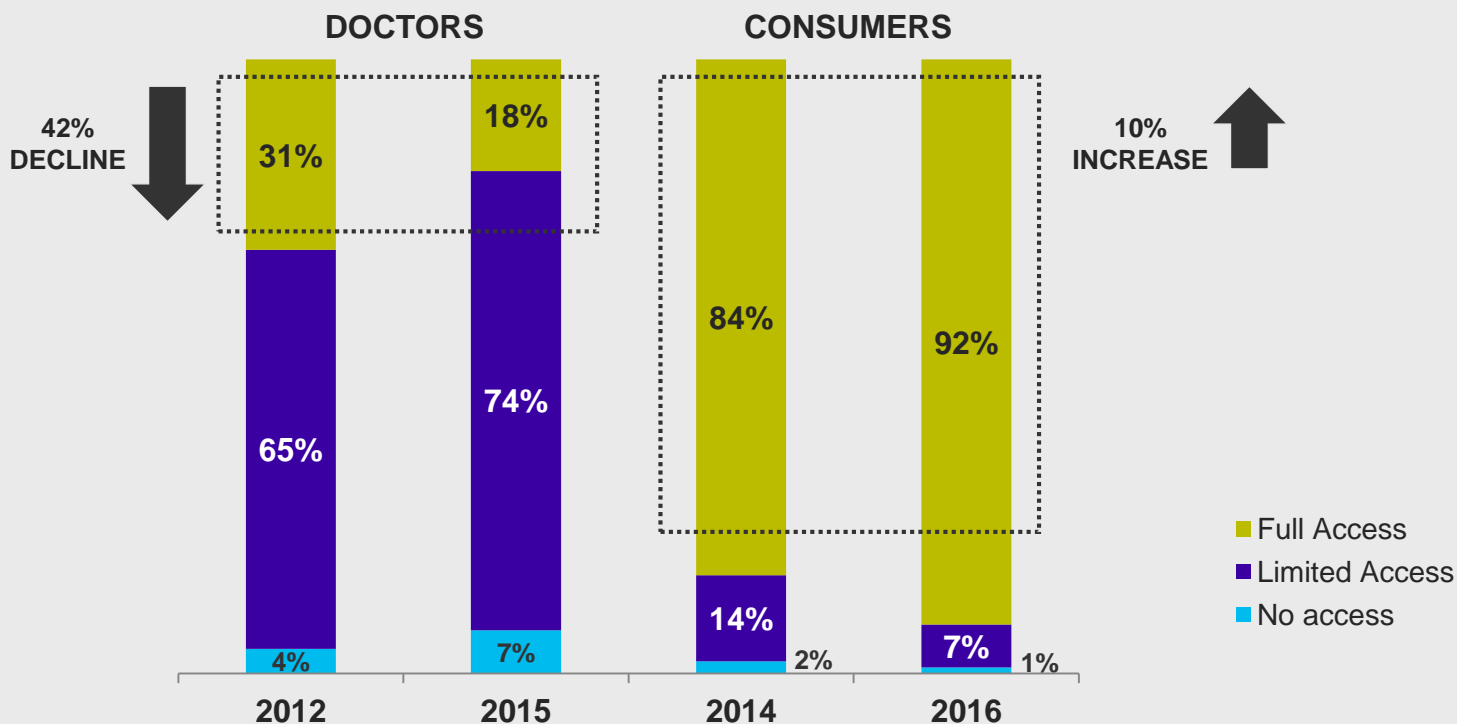
BASE: ALL QUALIFIED RESPONDENTS(2016 n=2225)
 Q830 (D905/710) What level of access should you as a patient have to your electronic health record, created by your physician?
 Q840 (D905/710) What level of access do you as a patient have to your electronic health record, created by your physician?

BASE: SHOULD HAVE ACCESS TO EHR (2016 n=2203)
 Q835 What information should you as a patient see in your electronic health record?
 *2015 Accenture Doctors Survey (n=601)

Growing gap among patients and doctors on “Full Access” to EHRs



Level of Access Patient Should Have to Personal Electronic Health Record



DOCTORS BASE: ALL QUALIFIED RESPONDENTS (2016 n=601)

Q905/Q710. What level of access should a patient have to his or her electronic personal health record?

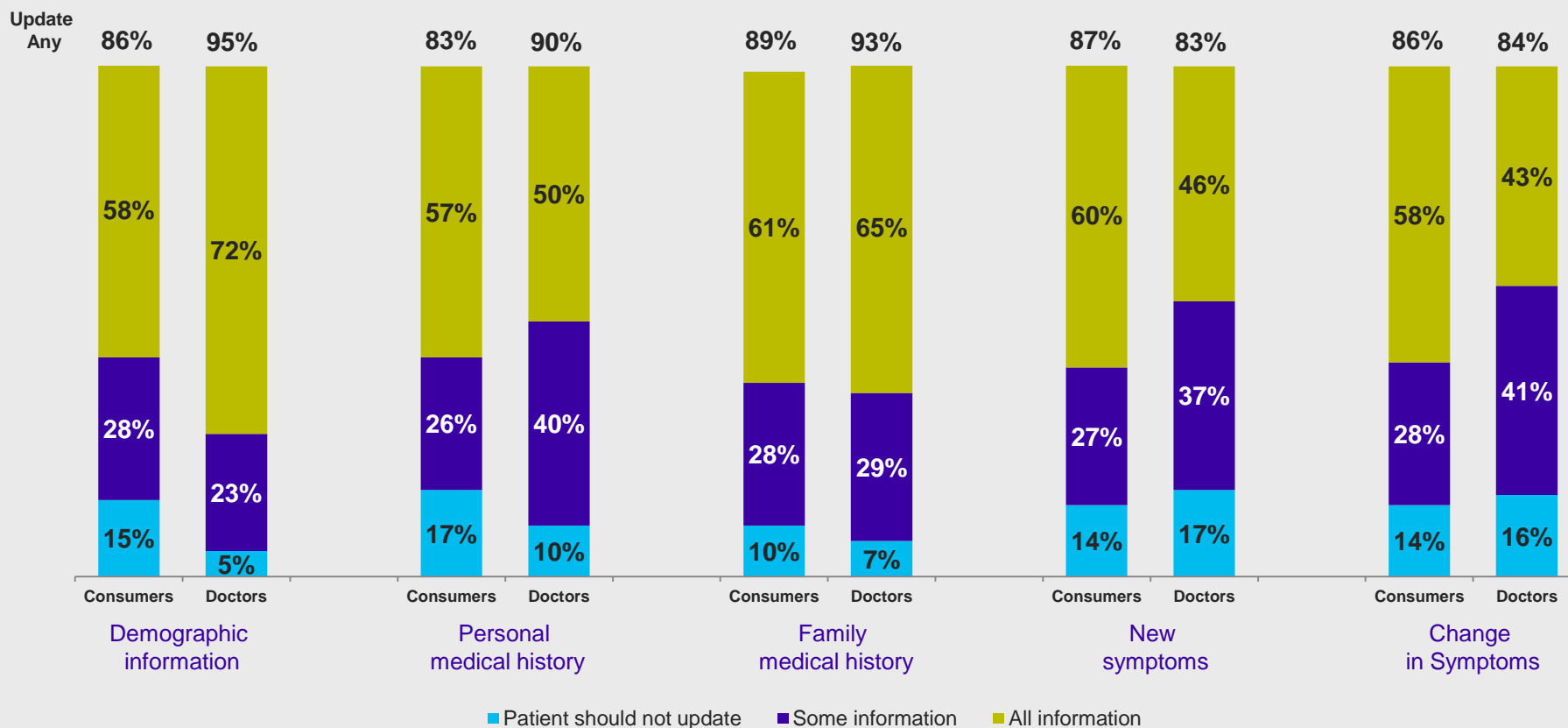
CONSUMERS BASE: ALL QUALIFIED RESPONDENTS(2016 n=2225)

Q830 (D905/710) What level of access should you as a patient have to your electronic health record, created by your physician?

US consumers and doctors agree that patients should update EHRs with demographic, medical history, and symptom information



Level of Patient Updating to Electronic Personal Health Record (1 of 2)

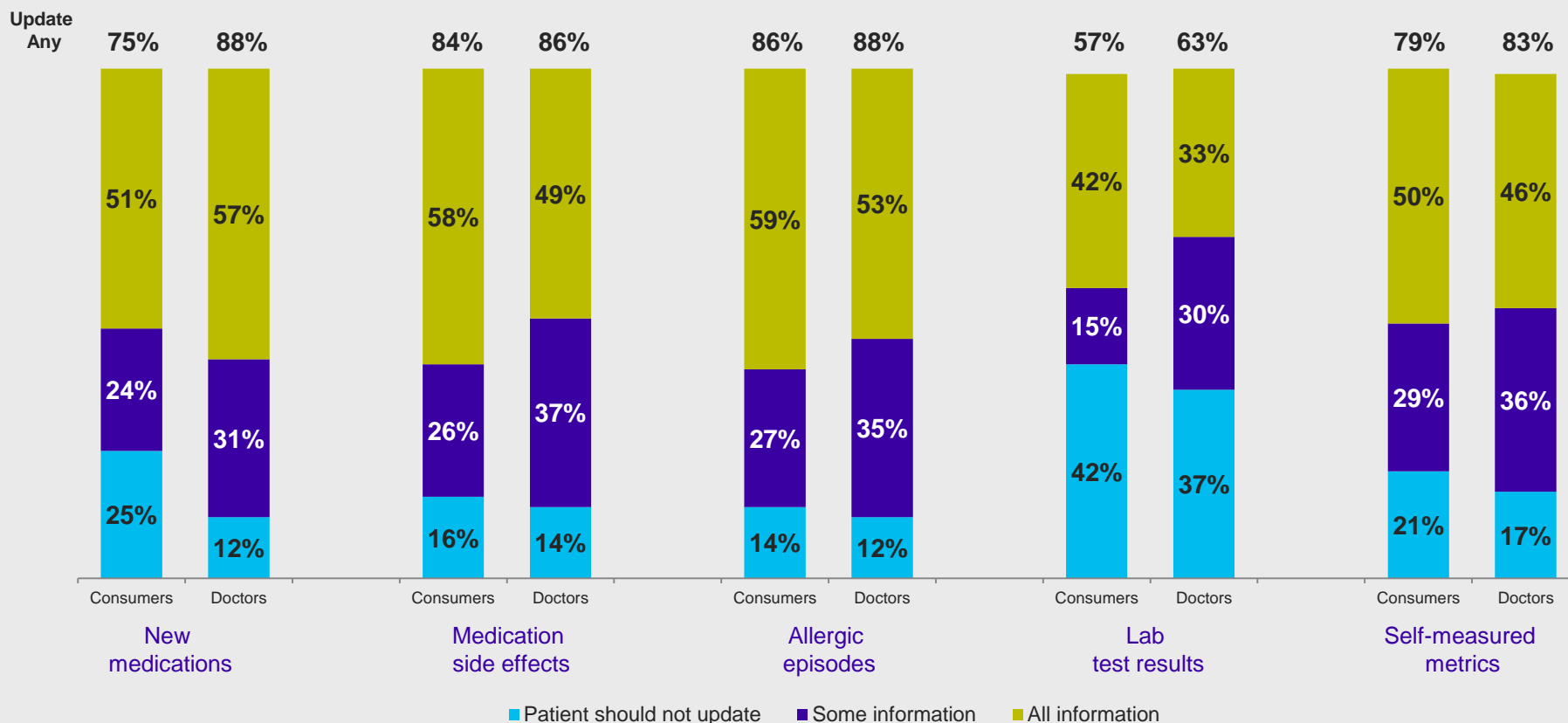


BASE: ALL QUALIFIED RESPONDENTS 2015 Accenture Doctors Survey (n=601); 2016 Accenture Consumers Survey (n=2225)
 Q880 (D910/712) How much of each of the following types of information should you, as a patient be able to update in your electronic personal health record?

Many US consumers and doctors say patients should *not* update lab test results



Level of Patient Updating to Electronic Personal Health Record (2 of 2)



BASE: ALL QUALIFIED RESPONDENTS 2015 Accenture Doctors Survey (n=601); 2016 Accenture Consumers Survey (n=2225)
 Q880 (D910/712) How much of each of the following types of information should you, as a patient be able to update in your electronic personal health record?

US consumers view EHRs as a tool primarily for their doctors and themselves, not accessible to others



Who should have access to your EHR?

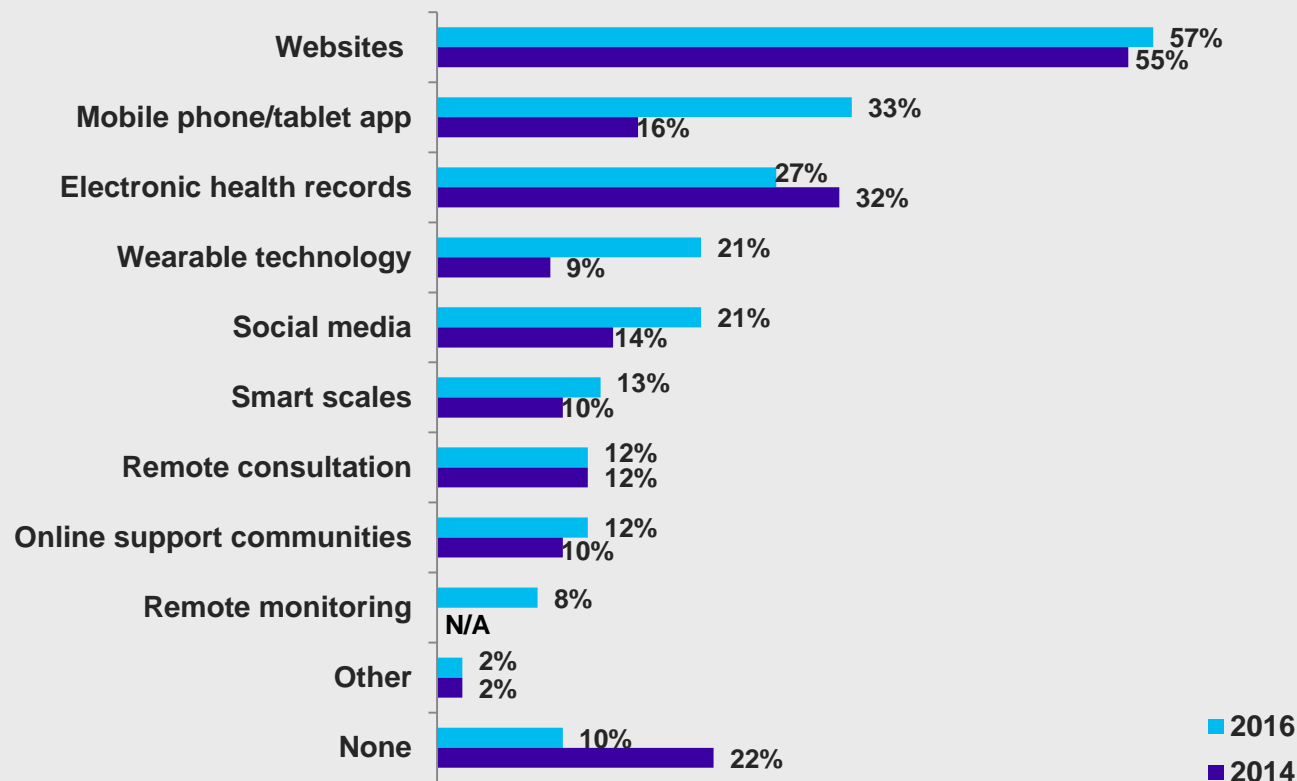


BASE: ALL QUALIFIED RESPONDENTS (2016 n=2225)
Q825 Who should have access to your electronic health records?

Compared to 2014, more consumers who use health technology are using apps and wearables



Technology or Electronic Health Management Tools Used



BASE: USES TECHNOLOGY TO MANAGE HEALTH (2014 n=1605; 2016 n=1434)

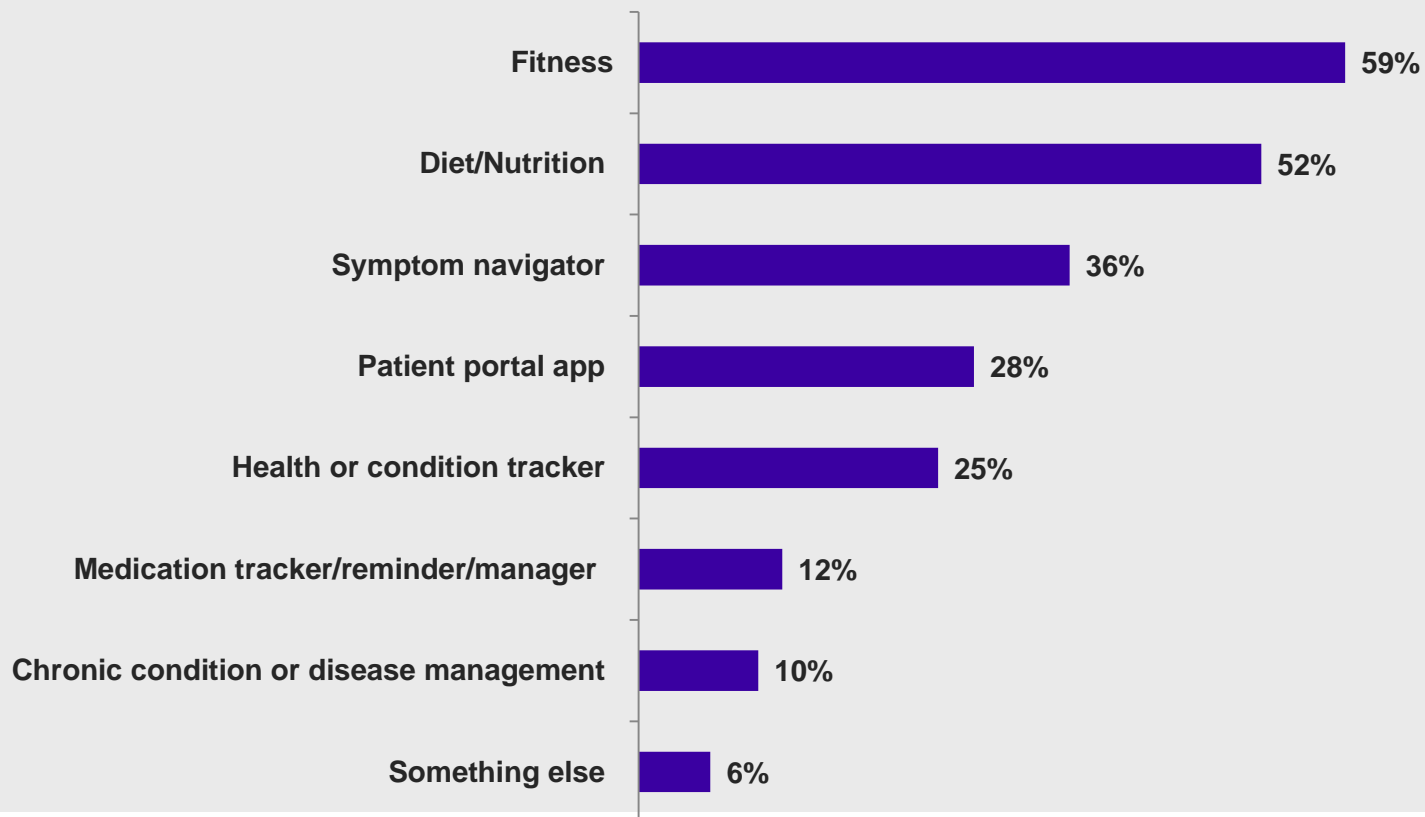
Q625 (Q126) Which of the following technology or electronic health management tools have you used to manage your health in the past year?

NOTE: unweighted data

Among US health app users, fitness apps are the most popular, followed closely by diet and nutrition apps



Type of App(s) Used

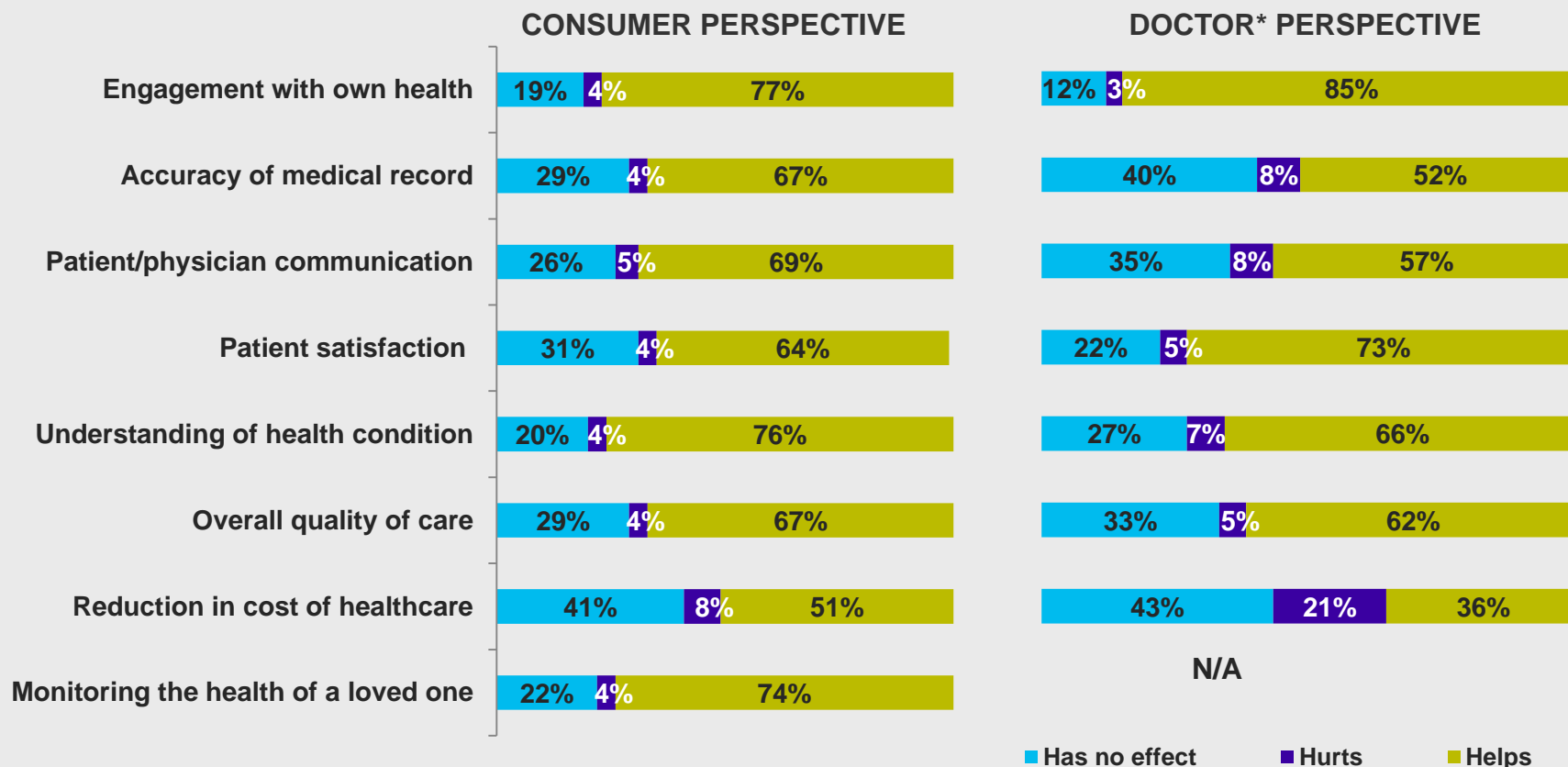


BASE: USED APPS IN PAST YEAR TO MANAGE HEALTH (2016 n=474)
Q630 What type of app(s) have you used?

Consumers and physicians agree that wearable health devices help patient engagement



Effect of Wearables On...



BASE: ALL QUALIFIED RESPONDENTS (2016 n=2225)

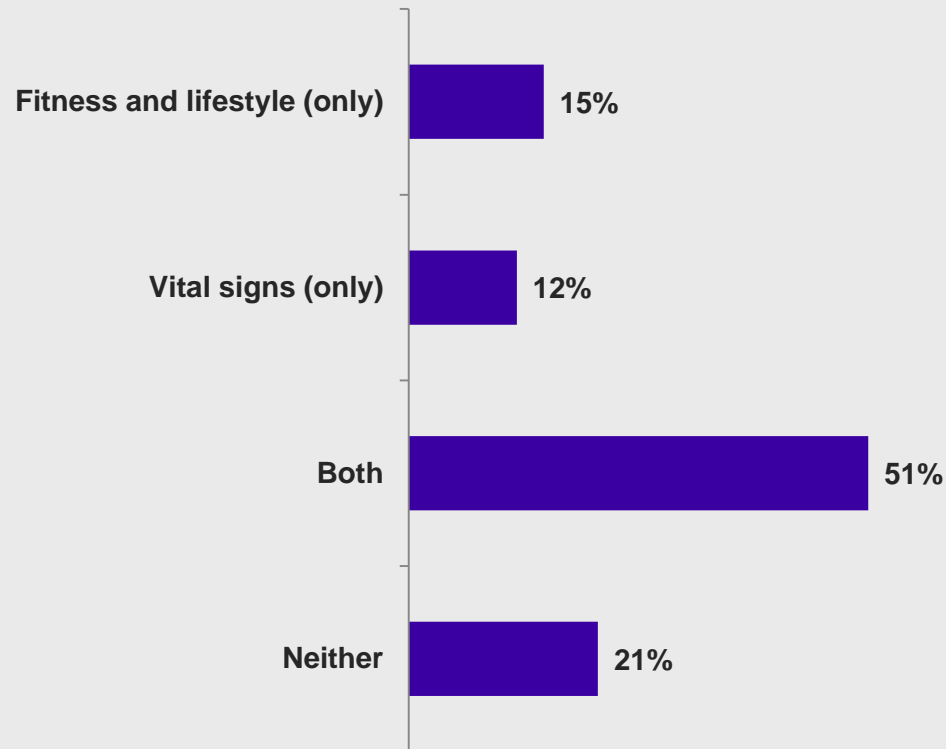
Q660 (D1070) Do you think the use of wearable health devices (for monitoring glucose, heart rate, physical activity, sleep, or weight) helps, hurts or has no effect on ...?

*2015 Accenture Doctors Survey (n=601)

Most US consumers wear or would be willing to wear health tracking technology



Wears or Would Be Willing to Wear Technology to Track...



BASE: ALL QUALIFIED RESPONDENTS (2016 n=2225)

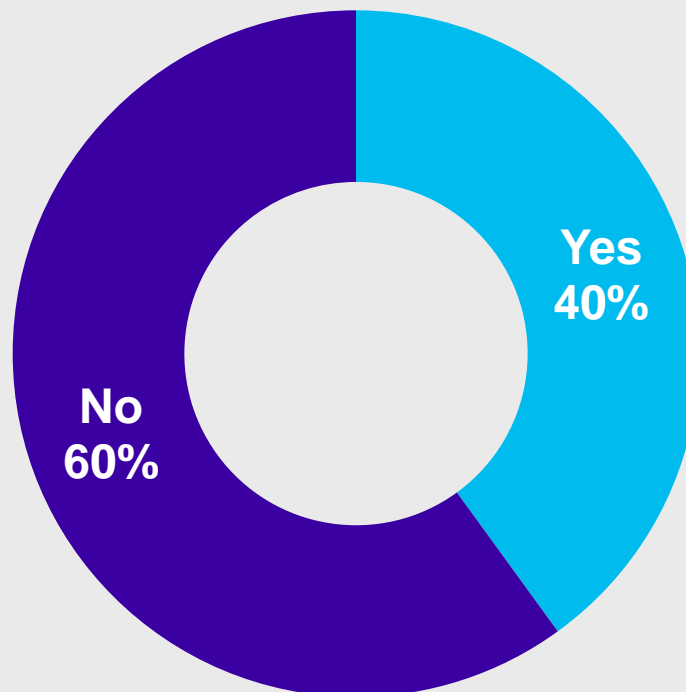
Q645 (Q151) Do you or would you be willing to wear technology that measures and tracks...?

NOTE: unweighted data

Many health app users have shared app data with a medical provider



Discussed or Shared App Data with Medical Provider



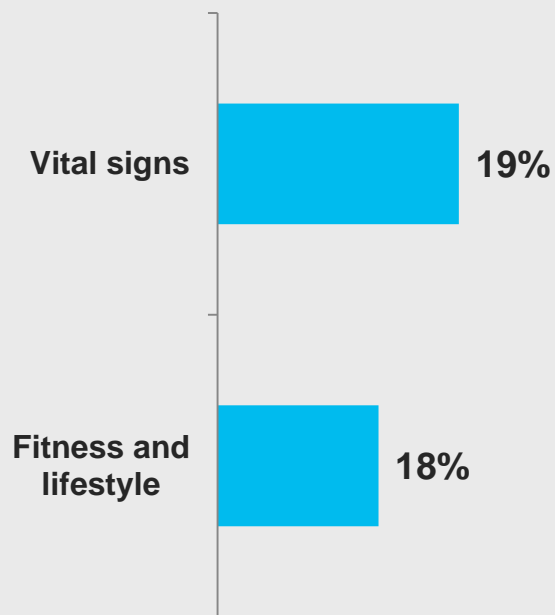
BASE: USED APPS IN PAST YEAR TO MANAGE HEALTH (2016 n=474)

Q635 Have you discussed or shared data from your app with your doctor or other medical provider?

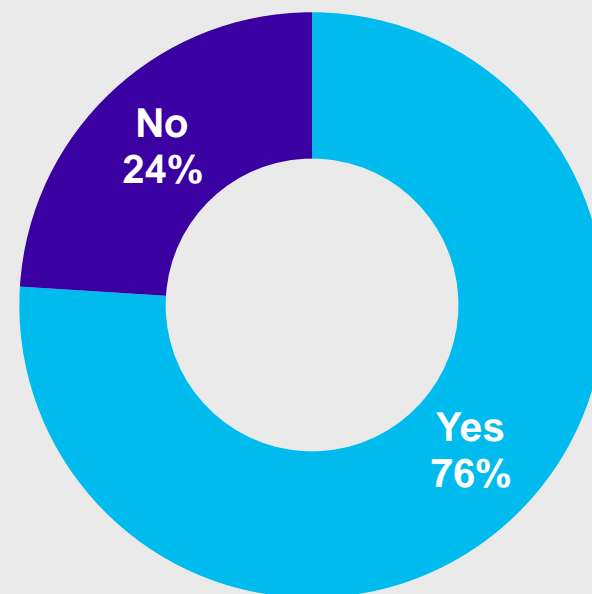
When recommended by a doctor, 3 in 4 consumers followed advice to wear technology to track health



Doctor Has Recommended Wearable Technology to Track...



Took Doctor's Advice



BASE: ALL QUALIFIED RESPONDENTS (2016 n=2225)

Q650 Has a doctor ever recommended that you wear technology to measure and track the following?

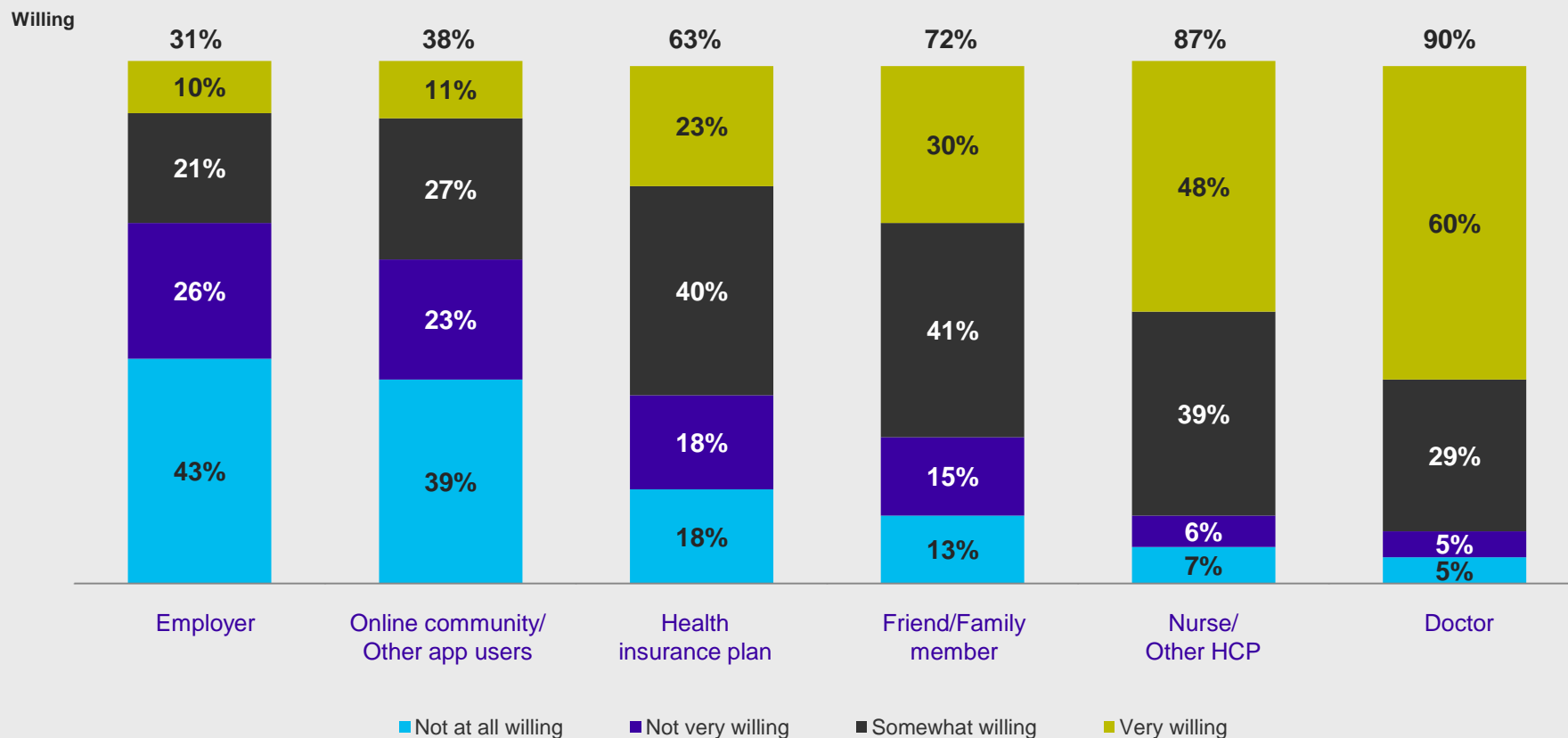
BASE: DOCTOR RECOMMENDED WEARABLE (2016 n=461)

Q655 Did you take your doctor's advice to wear technology to measure and track your fitness and lifestyle or vital signs?

Consumers are willing to share wearable or mobile app data with their doctors; fewer want it shared with employers or insurers



Willingness to Share Wearable or Mobile App Data



BASE: ALL QUALIFIED RESPONDENTS (2016 n=2225)

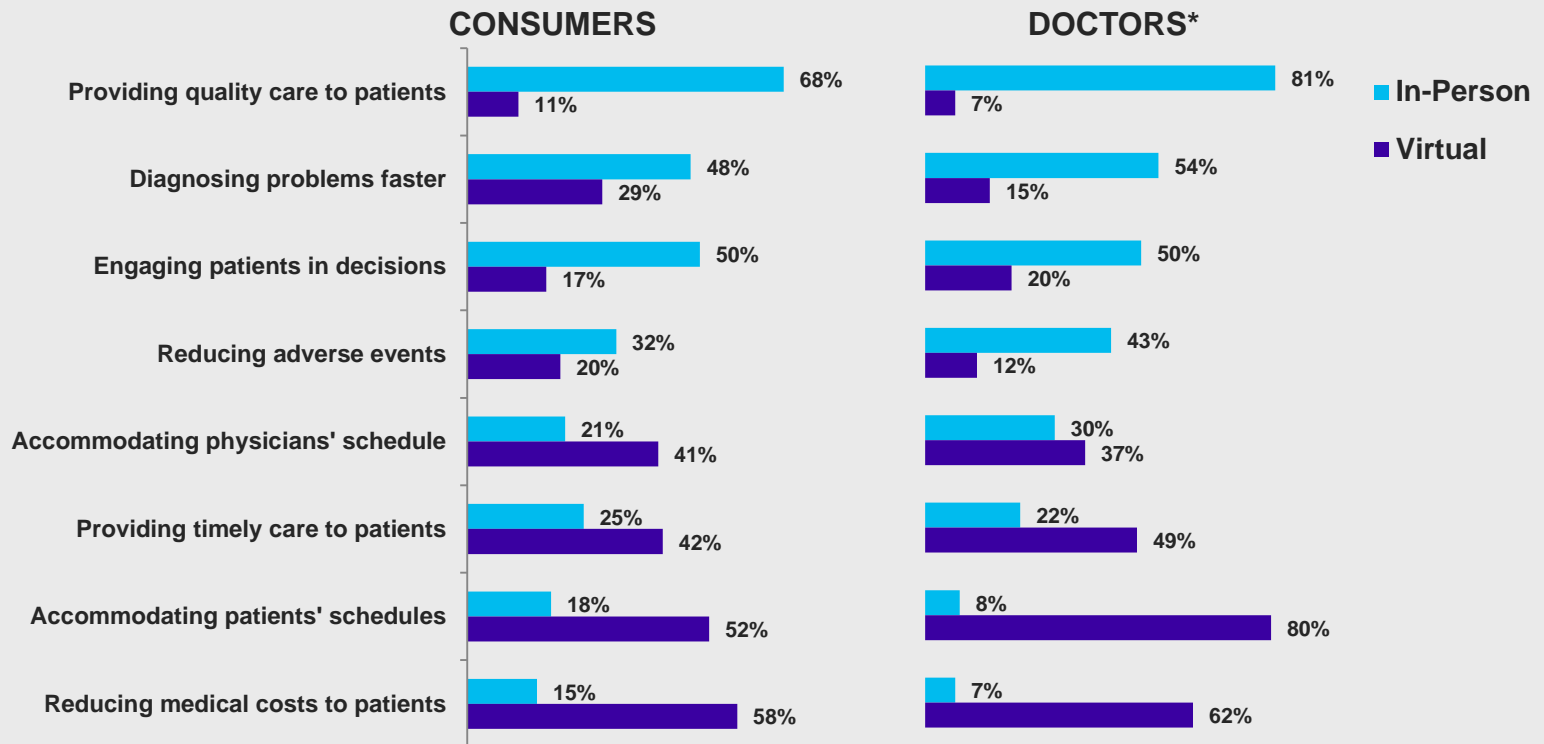
Q670 How willing would you be to share information from your wearable technology or mobile app (e.g., activity throughout the day, heart rate) with each of the following?

US doctors and consumers agree that virtual visits offer convenience and lower costs, but quality care is the main advantage of in-person visits



Advantages of Virtual or In-Person Visits

Percent Ranking Top 3 for In-Person and Virtual



BASE: ALL QUALIFIED RESPONDENTS (2016 n=2225)

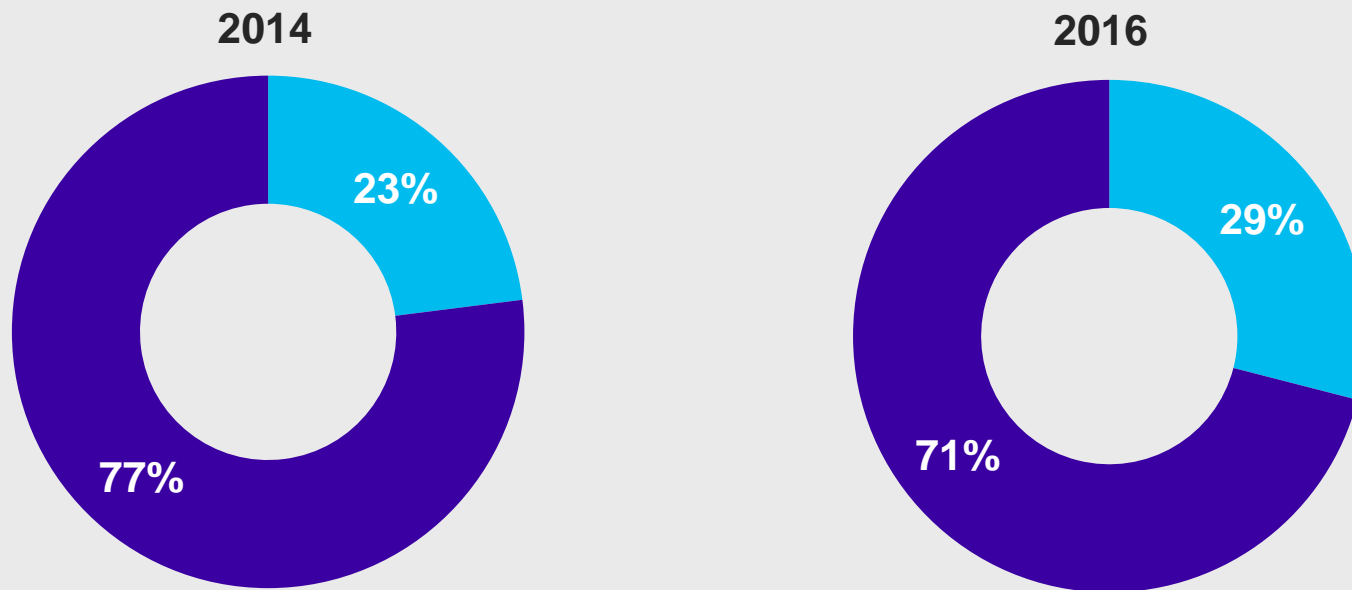
Q760 (D1035) From the list below, please select the top three advantages of in-person patient visits and the top three advantages of remote or virtual visits.

*2015 Accenture Doctors Survey (n=601)

In-person visits are still preferred over remote visits, but slightly more US consumers now prefer remote visits



Prefer Remote or In-Person Visits



- Remote
(Would prefer remote health visits (over traditional in-person) if meant could increase the number of times interacts with HCP)
- In-Person
(Prefers traditional in-person visits even if it means does not get to interact with HCP as often as would like)

BASE: ALL QUALIFIED RESPONDENTS (2014 n=2011; 2016 n=2225)

Q750 (Q199) Which of the following is closer to your view?

NOTE: unweighted data

