Insight Driven Health

Silver surfers continue to make waves in ehealth. But are healthcare organizations swimming against the tide?

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Silver surfers—people age 65 and over who use digital technology in their daily lives—are shattering myths about seniors' use of ehealth, how they value it, and what they expect of a technology-enabled health system, reveals the 2016 Accenture Consumer Survey on Patient Engagement[1].

Healthcare organizations cannot ignore the growing silver surfers trend. Digital demands are impacting seniors' coverage and provider choices in a crowded, commodity market that is literally growing by the day—10,000 Americans will turn 65 every day through 2030[2].

This silver tsunami is expanding the Medicare portion of healthcare organizations' membership and patient base. When compared with the general population, seniors are often more likely to have chronic conditions. Healthcare organizations that adopt digital health tools can influence seniors' buying behavior, engagement and health management. This increases a healthcare organization's relevance among a key demographic to help drive acquisition and retention, reduce costs and improve health outcomes.

None of this is possible unless healthcare organizations reject three persistent myths—and see seniors as the digital healthcare consumers they are.

[1] Accenture, 2016 Accenture Consumer Survey on Patient Engagement,
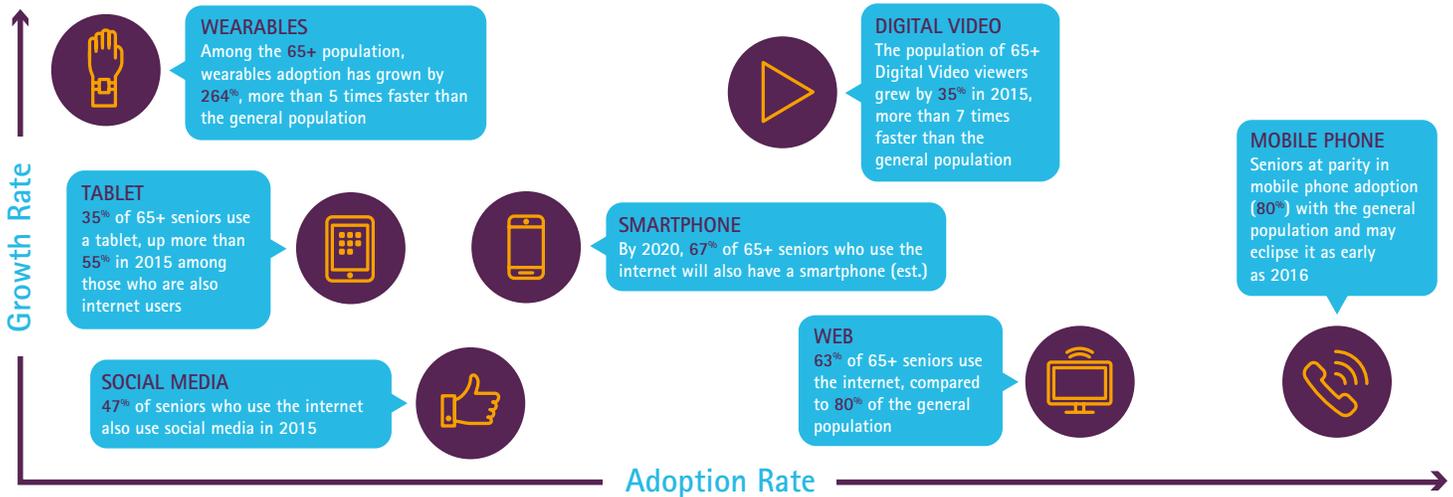   https://www.accenture.com/us-en/insight-research-shows-patients-united-states-want-heavy

[2] D'Vera Cohn and Paul Taylor, "Baby Boomers Approach 65—Glumly," Pew Research Center Social and Demographic Trends, December 20, 2010, retrieved on June 15, 2016 at
   http://www.pewsocialtrends.org/2010/12/20/baby-boomers-approach-65-glumly/

Myth 1: Seniors don't use ehealth—it's all just irrelevant gizmos and gadgets to them

Reality: When seniors don't use ehealth, it's because they perceive their health to be under control, not because they don't trust it

Contrary to popular belief, seniors are not stuck in yesterday's analog world. Digital technology is part of life for Americans of all ages, not just for digital natives and technology aficionados. In fact, seniors' regular use of digital channels today rivals that of younger people, and sometimes exceeds it (Figure 1).

Figure 1: Seniors use digital channels and expect very specific things across these channels

WEARABLES
Among the **65+** population, wearables adoption has grown by **264%**, more than 5 times faster than the general population

TABLET
35% of 65+ seniors use a tablet, up more than **55%** in 2015 among those who are also internet users

SOCIAL MEDIA
47% of seniors who use the internet also use social media in 2015

SMARTPHONE
By 2020, **67%** of 65+ seniors who use the internet will also have a smartphone (est.)

DIGITAL VIDEO
The population of 65+ Digital Video viewers grew by **35%** in 2015, more than 7 times faster than the general population

WEB
63% of 65+ seniors use the internet, compared to **80%** of the general population

MOBILE PHONE
Seniors at parity in mobile phone adoption (**80%**) with the general population and may eclipse it as early as 2016

Growth Rate

Adoption Rate

Source: Accenture analysis of eMarketer data

Silver surfers' digital behaviors carry over to healthcare, a connection Accenture first identified in 2013. This year's survey results indicate that the majority (53 percent) of people age 65 and over use health technology at least "a few times a month" to manage their health. Seniors are most likely to say that using digital health for health management is important for understanding their conditions and medications (Figure 2).

The reasons that seniors report for *not* using health technology regularly are equally revealing. Most (58 percent) don't use digital health because they perceive their health is under control, not because they can't afford it (12 percent), it is too difficult to learn to use (9 percent), or they don't trust it (1 percent.)

Healthcare organizations that do not relate to seniors as digital health consumers are missing opportunities to reach people and engage them in their healthcare. Silver surfers are more sophisticated digital consumers than most give them credit for being. Seniors avoid digital health not because they are confused, skeptical or untrusting. They have a simple, common sense reason for not engaging in it: They perceive they don't need it (now).

Should their health change, seniors' digital health preferences would likely change too. Seniors who responded that their health is under control have yet to be convinced that digital health tools can be used for maintaining wellness. This is an education opportunity for healthcare organizations to engage even more seniors with digital health.

Figure 2: Seniors say technology is important for managing their health for different reasons than others do

Main Reason Technology is Important for Managing Health	18–34	35–44	45–54	Pre-Medicare 55–64	Medicare 65–74	Older Medicare 75+
Technology helps me better understand my condition(s) and medication(s)	24%	29%	38%	35%	41%	55%
Technology saves time	34%	33%	27%	25%	18%	13%
Technology helps me improve my health	19%	18%	18%	20%	17%	9%
Technology saves money	12%	9%	6%	7%	6%	2%
My health system requires I use technology to manage my health	6%	5%	4%	6%	9%	4%

Source: Accenture 2016 Consumer Survey on Patient Engagement

Myth 2: There is a large digital divide between younger health consumers and seniors

Reality: Just like younger people, seniors connect ehealth to better healthcare experiences

Silver surfers are using digital health for the same reasons that the general population is. They believe it benefits their overall health experience, both in terms of access to valuable health information and the administration of their relationships with providers.

Most seniors and non-seniors agree at essentially the same rate that "I receive better care when my doctors can access and use my electronic health records,"—84 percent of seniors and 81 percent of non-seniors. What's more, 84 percent of seniors and 81 percent of non-seniors expect their healthcare providers to be able to access their electronic health records.

Seniors also expect to communicate digitally with their healthcare providers. Most report that digital health capabilities like electronic prescription refill requests (66 percent), email or text reminders (53 percent), online appointment scheduling (49 percent), and secure email communications (46 percent) would make them more likely to select a provider. These rates are similar among healthcare consumers under the age of 65 for electronic prescription refill requests (66 percent) and email or text reminder (57 percent).

While there is much more to the broader healthcare experience than information access and convenience, these are critical measures of value and expectations among healthcare consumers. And regardless of their age, most believe that digital can significantly improve both.

Myth 3: Seniors have zero interest in new ehealth tools and would be overwhelmed by them

Reality: Seniors' ehealth use is accelerating rapidly, and they are very interested in new options

Because they value digital health, silver surfers' use of it is growing fast. Substantially more seniors than ever before are accessing their electronic health records, and doing it more often.

Consider surprising survey results. The number of silver surfers who accessed their records electronically more than doubled from 2014 to 2016, increasing from 23 to 48 percent in just two years. Seniors with electronic health records also report an increased knowledge of what specific elements they can access. For example, 25 percent of seniors with electronic health records said they could access prescription histories in 2014 compared to 52 percent in 2016.

Silver surfers' access to lab work through their electronic health records jumped from 28 percent to 58 percent during this same period.

These behaviors reflect an important characteristic of how seniors use digital health. Previous Accenture analysis that silver surfers are most interested in using digital services to manage their health, not their healthcare costs, holds true and the trend is accelerating[4]. Not only are silver surfers actively using available digital health management tools, they are open to new possibilities. Seventeen percent say they would prefer remote visits to allow more time with their provider, up from 8 percent in 2014.

From myths to momentum

With seniors more digitally-enabled than ever, healthcare organizations must move past the myths and take digital health seriously as a tool to attract, engage and retain seniors. Three fundamentals are essential for success:

- Prioritize digital experiences. Healthcare organizations can focus first on digital experiences such as purchasing insurance or deciding treatment that seniors report have a positive impact on their Net Promoter Score ® (NPS).[5] NPS measures organizations' consumer loyalty based on consumers' willingness to recommend and has been highly correlated with financial success for leading companies. This prioritization should account for the fact that digital experiences must be a supplement, not a replacement, for physical interaction points between healthcare consumers and healthcare organizations.

- Design for the entire ecosystem. Rather than focus on individual touchpoints in seniors' digital health experiences, healthcare organizations should follow service design principles that consider interactions among the constellation of people, products, places and process that create a great digital experience. This shifts the focus from designing for users and things to designing for the true context of people's lives.

- Know exactly who seniors are. Healthcare organizations must avoid the temptation of one-size-fits-all digital health solutions for seniors. They are not a homogeneous group and need more than big buttons and large type fonts. Organizations must use granular data insight to know Medicare consumers, work iteratively with a test-learn-tweak mindset and be guided by empathy for what these consumers need and will use.

Seniors' digital acumen is real. And the silver surfers ehealth wave has yet to crest. Developing thoughtful digital health solutions that meet seniors' digital demands is about more than giving seniors what they want. It's building a foundation for affordable, superior experiences and better health.

[4] Accenture, The Next eHealth Wave for Silver Surfers: Health Management, 2014, https://www.accenture.com/us-en/insight-next-ehealth-wave-silver-surfers-health-management

® Net Promoter, Net Promoter System, Net Promoter Score, NPS and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

[5] Accenture 2015 Member Experience/Payer Benchmark Survey

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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, Brazil, England, Norway, Saudi Arabia, Singapore and the United States, including a total of 2,225 US consumers, of which 442 were seniors, ages 65+. About 84 percent of these US seniors were receiving Medicare benefits. The survey was conducted by Nielsen on behalf of Accenture between November 2015 and January 2016.

About Accenture Insight Driven Health

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