Healthcare consumers in Saudi Arabia want a digitally enabled care experience to better manage their health.
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 organisations must close the gap between what patients demand and what providers deliver by investing in digital tools and strategies.
Consumers in Saudi Arabia consider digital technology to be an integral part of effective health management.
Most (84%) consumers find technology important in managing their health (see Figure 1). Consumers who use technology to manage their health use websites (44%), apps (40%), social media (41%) and wearable technology (14%). Remote consultation (24%) and remote monitoring (12%) are also used by some consumers for health management (see Figure 2).

**FIGURE 2.**
Technology and electronic health management tools consumers used to manage health in the past year

- Websites: 44%
- Apps: 40%
- Social media: 41%
- Wearable technology: 14%
- Remote consultation: 24%
- Remote monitoring: 12%

**FIGURE 3.**
The most popular health apps are fitness and diet/nutrition

- Fitness: 46%
- Diet/nutrition: 54%
- Health/condition tracker: 28%
- Symptom navigator: 24%
- Patient portal app: 19%
- Medication tracker/reminder/manager: 18%
- Chronic condition or disease management: 17%

Source: Accenture 2016
Consumers want more access to their data in Electronic Health Records (EHRs)

Consumers (81%) agree that they receive better care when their doctors can access and use their EHRs (see Figure 4).
Consumers are becoming more active in managing their health, and the majority (55%) would like to see the same depth of information that the doctors sees, rather than just a summarised version (see Figure 5).

Among those consumers who know what information they have access to, 34% say accessing lab work and blood test results is most helpful to manage their health, while 27% say access to physician notes is most helpful (see Figure 6).

Also, consumers who have not accessed their records say physician notes (31%) and lab results (29%) would be most helpful (see Figure 7).
Consumers agree there are benefits of remote monitoring and data sharing.

Just over one third (35%) of consumers in the most recent survey said they prefer virtual doctor appointments to face-to-face doctor appointments (see Figure 8).

Consumers believe that virtual visits provide benefits for patients, such as lower costs (50%) and scheduling convenience for patients (37%) while in person visits provide more quality care (48%) (see Figure 9).
Consumers have strong views on who should access their EHR data. They view their EHR as a tool for their primary doctor (51%), or themselves (47%). Very few (8%) consumers believe their employer, retail clinic (8%) or government (16%) should be able to access their health record (see Figure 10).

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

Most consumers are willing to share wearable or app data with a doctor (76%) or nurse (67%)—and 40% of health app users have already done so. Willingness to share wearable or app data drops when it comes to employers (44%). (See Figure 11)

**FIGURE 8.**
Overall, the majority of consumers continue to prefer in-person visits over virtual visits

**FIGURE 9.**
Consumers in Saudi Arabia associate in-person visits with quality care; consumers see virtual as cost-effective

**FIGURE 10.**
Consumers view EHR primarily as a tool for their doctors and themselves

**FIGURE 11.**
Most consumers are willing to share wearable or app data with a doctor or nurse

Source: Accenture 2016
Consumers' digital adoption 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 doctors 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.
"Digital technologies are transforming how patients engage and take more control over their health."

Dr. Majid Altuwaijri, Accenture H&PS Lead in Middle East and North Africa
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.

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