DIGITAL HEALTH: WHEN PRIMARY CARE IS NOT ALWAYS PRIMARY

Healthcare consumers are relying less on primary care physicians (PCPs) and more on digital technology, other clinical professionals and convenience care to manage their health. The younger people are, the less they depend on a PCP, signaling a new future for primary care.
A NEW ERA BEGINS

Digital health technologies that enable better patient self-management with easier and faster access to physicians are flooding the market. As these technologies evolve, and convenience care options grow, consumers are engaging less regularly with a dedicated PCP, Accenture research shows. For many, especially younger consumers, complete reliance on the knowledge and experience of a single physician will be a healthcare model of the past. PCPs are not becoming obsolete, however, their role in health management and their younger patient relationships are changing.

This change runs counter to the common narrative about primary care that says every individual wants and needs a PCP. It also sheds new light on traditional forecasts of PCP shortages, which are based on static utilization and do not reflect generational differences in the demand for primary care.

Shattering the status quo

People once went to their PCP as the first line of defense against everything that ailed them, from the common cold to chronic disease management. Times are changing. A recent Accenture survey shows that not only is PCP use and dependency lower for younger versus older adults, the younger the person the less likely they are to even have a PCP:

Who has a PCP?

- 92 percent of silent generation (born 1928 to 1945)
- 82 percent of baby boomers (born 1946 to 1964)
- 73 percent of Gen Xers (born 1965 to 1980)
- 57 percent of millennials (born 1981 to 1997)

Access, availability, confidence in more health providers and the rise of health management alternatives offer more consumer-friendly choices that contribute to more care when wanted than seeking out a specific primary care physician.

The reduction in PCP dependency challenges well-established assumptions about physician manpower needs that influence investments in residency programs, hospital recruitment and hiring on both national and local levels. The reality is that as the younger adults who need fewer PCPs age, service use will shift to integrate both digital technologies and alternative practitioners, contributing to lower PCP demand than has been assumed.

Digital devices as health managers

Already today, more consumers are relying on digital devices to help them manage their own health. While digital device use is significant across all adults, it is highest among millennials, followed by Gen Xers, according to the survey.

Only the silent generation relies solely on professionals, when asked if they rely more on professionals or mobile health devices (including tracking devices for personal activity, diet, fitness and weight loss) to manage their health. Consider consumer responses across the other generations surveyed:

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<tr>
<th>BABY BOOMERS</th>
<th>GEN Xers</th>
<th>MILLENNIALS</th>
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<td>91 percent rely more on professionals, and 9 percent rely more on devices.</td>
<td>75 percent rely more on professionals, and 25 percent rely more on devices.</td>
<td>63 percent rely more on professionals, and 37 percent rely more on devices.</td>
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1 Accenture research. Age bands reflect age cohorts from the Pew Research Center.
2 Accenture research.
Even though people rely more on professionals today, there is a trend toward digital supplanting professional visits, including primary care visits. Consumers are using technology to stay healthier through monitoring and self-management, triaging issues or connecting to physicians virtually—all of which make office visits less necessary. This shift shows a population dominance by digital natives (millennials and Gen Xers) over digital immigrants (baby boomers and silent generation). It signals that health systems that have been shaped around older adults’ intense utilization must now integrate and pull through younger adults.

**Professionals beyond the PCP**

In addition to relying on digital devices, consumers are turning to care teams that include healthcare professionals other than PCPs. These include nurse practitioners, physician assistants and physician extenders, specialists and urgent care centers.

As mentioned previously, 91 percent of baby boomers rely more on professionals than on mobile health devices to manage their health. Yet only 82 percent report having a regular PCP that they trust and engage with regularly. This gap suggests that baby boomers have a higher reliance on other professionals than have a dedicated PCP. Anecdotal evidence suggests that baby boomers are often inclined to seek out specialist care. They go straight to the “expert” to address very specific health needs without sacrificing the time or money to have a PCP orchestrate a care team for them.

Millennials also have a higher reliance on other professionals than have a dedicated PCP, but for very different reasons. While 63 percent of millennials rely on healthcare professionals more than on digital devices for health management, only 57 percent have a PCP. In this case, anecdotal evidence suggests that millennials—digital natives and lovers of convenience—are drawn to urgent care, telehealth and retail clinics instead of PCPs when they need care. Specialty urgent care centers as destination hubs, rather than traditional primary care models, have a special appeal to both generations.

**Putting change into practice**

These healthcare consumer trends will not completely upend primary care as we know it soon. But they will shape its future in the next decades. Leaders tasked with strategic and operational responses to consumer demand can act to prepare for coming changes now:

- **CLEAN SLATE PHYSICIAN DEMAND PLANNING.** Demand forecasting must include more dynamic demand indicators – e.g. consumer driven demand factors – than they have in the past, and involve different personas representing multiple approaches to utilization. Forecasts based on a single consumer profile of PCP use do not account for variability in consumer habit, missing the multiple-health-channel demand that includes live and digital health services. This could result in inaccuracies or even dire forecasts of PCP shortages that may never materialize.

- **RECOGNIZE CONSUMERS ARE RELYING MORE ON DIGITAL DEVICES FOR HEALTH MANAGEMENT.** Given the digital evolution impacting self care, providers can feel more confident about patients managing themselves with devices, with input and oversight from provider teams.

- **MATCH PHYSICIAN PRODUCTIVITY TO DEMAND.** Physician practice leaders will continue to adjust demand and capacity to accommodate target patient use, access and ease of contact in their forecasts. This new approach to forecasting real PCP demand versus alternatives that enable self-management, urgent care and virtual health visits will result in a cost-effective practice model.

The convergence of digital health and new consumer demand for providers is driving integrated access, experience and capacity. And it must also integrate the patients’ definition and demand for personal and digital contact with a broad set of providers, not just the traditional primary care provider.
METHODOLOGY
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.

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