TODAY’S CONSUMERS REVEAL THE FUTURE OF HEALTHCARE

Accenture 2019 Digital Health Consumer Survey
US Results
Healthcare consumers today are changing, and their expectations for convenience, affordability and quality are redefining how they engage at each stage of care. Younger consumers are not satisfied with healthcare’s status quo and consumers of all generations are more willing to try non-traditional services. The providers and payers who heed the shifts and deliver what patients are looking for will be the ones to earn loyalty, navigate disruption and be strongly positioned as the future of healthcare consumerism unfolds.

**Traditional healthcare** refers to established types of service delivery—i.e., doctors and other professionals in hospitals, clinics, medical centers or doctors’ offices.

**Non-traditional healthcare** refers to other, emerging types of service delivery—i.e., walk-in or retail clinics, outpatient surgery hospitals, virtual health (via the phone, on video or apps), on-demand services or digital therapeutics.

Source: Accenture 2019
Younger consumers are least likely to have a PCP

Gen Z and millennials are least likely to have a primary care physician (PCP), compared to Gen X, baby boomers and the silent generation. Some younger generations say they would like to have a PCP but have not found one that meets their preferences for affordability and convenience. Gen Z is the most likely generation to seek out wellness practices (e.g. yoga, acupuncture) beyond Western medicine. With millennials projected to become the largest generation in 2019, this generation holds the most power to influence future healthcare models.

Figure 1. Who has a PCP?

I have a primary care physician (PCP)/GP/doctor (i.e., a doctor I return to for regular check-ups or whenever I need basic medical care)

85%
Silent Generation (born 1928 to 1945)

84%
Baby Boomers (born 1946 to 1964)

76%
Gen Xers (born 1965 to 1980)

67%
Millennials (born 1981 to 1996)

55%
Gen Z (born 1997 onward)

I would like to have a primary care physician (PCP)/GP/doctor but have not found one that meets my needs (e.g., affordability, convenience)

4%
Silent Generation

4%
Baby Boomers

8%
Gen Xers

14%
Millennials

20%
Gen Z

Q: Which of the following apply to you?

Source: Accenture 2019
Younger consumers are dissatisfied with many aspects of traditional care

Younger consumers—Gen Z and millennials—are the most dissatisfied with the quality of traditional healthcare services. As these younger generations age and have greater healthcare needs, they will increasingly look for services to satisfy their expectations for effectiveness, convenience, efficiency and transparency.

**Figure 2. Younger generations are “dissatisfied” and “very dissatisfied” with aspects of traditional care**

- **Effectiveness of the treatment**: Gen Z (12%), Millennials (32%), Gen Xers (24%), Baby Boomers (21%), Silent (15%)
- **Responsiveness to follow-up questions outside the appointment (via email or phone)**: Gen Z (15%), Millennials (24%), Gen Xers (11%), Baby Boomers (10%), Silent (9%)
- **Transparency about cost to me (e.g., my cost is known beforehand)**: Gen Z (21%), Millennials (18%), Gen Xers (18%), Baby Boomers (15%), Silent (10%)
- **Wait time and speed of appointment**: Gen Z (18%), Millennials (21%), Gen Xers (13%), Baby Boomers (13%), Silent (6%)
- **Convenience of the location or channel**: Gen Z (13%), Millennials (24%), Gen Xers (8%), Baby Boomers (4%), Silent (4%)
- **Cost of the treatment**: Gen Z (24%), Millennials (21%), Gen Xers (15%), Baby Boomers (15%), Silent (6%)
- **Whether or not the doctor prescribes medication I expect or request**: Gen Z (24%), Millennials (10%), Gen Xers (7%), Baby Boomers (5%), Silent (3%)
- **Efficient operations (e.g., e-billing)**: Gen Z (18%), Millennials (16%), Gen Xers (11%), Baby Boomers (8%), Silent (5%)
- **Convenience of the appointment times**: Gen Z (15%), Millennials (16%), Gen Xers (8%), Baby Boomers (6%), Silent (5%)

Q: Thinking about the traditional healthcare services you have used, how satisfied are you with the quality of those services? "Very dissatisfied" and "Dissatisfied" responses

Source: Accenture 2019
Convenience is also a top factor influencing care choices

Understandably, insurance coverage is the top-ranked factor influencing US consumer decisions about where and when to seek medical treatment. Consumers also will choose care that is conveniently located, reputable, comes recommended and has short wait times, among other factors.

Figure 3. Consumers make decisions on when and where to seek medical treatment based on affordability, convenience and reputation

39% Accepts my insurance
24% Low cost to me
23% Convenient location
16% Reputation for providing superior care
13% Recommendations from a health provider on when and where to seek services (e.g., lab tests, imaging treatment)
10% Short wait times to secure an appointment
10% Short wait times on the day of visit
7% Recommendations from friends and family based on their experiences

Q: Which of the following factors most influence your decisions about when and where to seek medical treatment or services? Rank 1 + Rank 2 responses

Source: Accenture 2019
Transparency and time savings deliver greater satisfaction

Transparency about cost is equally important to the satisfaction of younger and older consumers (65 percent believe it to be a very important or critically important factor). However, younger generations place greater importance on convenience of appointment times (62 percent compared to 57 percent of older generations) and wait time and speed of appointment (58 percent compared to 53 percent). Older consumers place greater importance on transparency about care.

Figure 4. Satisfaction across younger and older consumers hinges on:

- Gen Z/Millennials/Gen X
- Baby Boomers/Silent

Q: How important are the following factors in determining your satisfaction with the healthcare services you receive? “Critically important” and “Very important” responses

- **70% 75%** Cost to me of the treatment/Whether the treatment is covered by insurance
- **68% 76%** Transparency about care (e.g., what test will be conducted, and why)
- **65% 65%** Transparency about cost to me (e.g., my cost is known beforehand)
- **62% 57%** Convenience of the appointment times
- **58% 63%** Responsiveness to follow-up questions outside the appointment (via email or phone)
- **58% 53%** Wait time and speed of appointment
- **56% 57%** Convenience of the location or channel
- **55% 52%** Efficient operations (e.g., e-billing)
- **51% 48%** Whether or not the doctor prescribes medication I expect or request

Source: Accenture 2019
Consumer satisfaction levels are similar across non-traditional and traditional healthcare services

Patients believe the quality of non-traditional care is similar to that of traditional care. When thinking about non-traditional healthcare services, many patients are “very satisfied” and “extremely satisfied” with the level of transparency, convenience, effectiveness, efficiency and cost of those services.

Figure 5. Satisfaction levels of those “very satisfied” and “extremely satisfied” are comparable across traditional and non-traditional

- Effectiveness of the treatment: 53% (Non-traditional) vs. 63% (Traditional)
- Convenience of the location or channel: 57% (Non-traditional) vs. 62% (Traditional)
- Transparency about care: 51% (Non-traditional) vs. 61% (Traditional)
- Whether or not the doctor prescribes medication I expect or request: 51% (Non-traditional) vs. 61% (Traditional)
- Convenience of the appointment times: 55% (Non-traditional) vs. 56% (Traditional)
- Efficient operations: 49% (Non-traditional) vs. 54% (Traditional)
- Responsiveness to follow-up questions: 47% (Non-traditional) vs. 52% (Traditional)
- Wait time and speed of appointment: 48% (Non-traditional) vs. 50% (Traditional)
- Transparency about cost to me: 46% (Non-traditional) vs. 49% (Traditional)
- Cost of treatment: 44% (Non-traditional) vs. 48% (Traditional)

Q: Thinking about the healthcare services you have used, how satisfied are you with the quality of those services? “Very satisfied” and “Extremely satisfied” responses

Source: Accenture 2019
Expectations for digital capabilities are on the rise

More than half of patients surveyed expect digital capabilities—from requesting prescription refills to booking appointments. These expectations increasingly influence who these patients choose in a provider. For instance, in 2019, 70 percent are more likely to choose a provider that offers reminders for follow-up care via email or text, compared to 57 percent in 2016. More than half (53 percent) in 2019 are more likely to use a provider offering remote or telemonitoring devices, compared to 39 percent in 2016.

Figure 6. Consumers increasingly will choose medical providers who offer digital capabilities

Q: If you were choosing a new or adding an additional medical provider, would being able to use the following electronic capabilities increase your likelihood of choosing that provider? “More likely” responses

Source: Accenture 2019
Younger consumers are **MUCH MORE LIKELY** to choose medical providers with digital capabilities

Compared with older generations, younger consumers are much more likely to choose medical providers who offer digital capabilities such as easy access to test results via mobile or online (40 percent of Gen Z and 44 percent of millennials) and requesting prescription refills electronically (38 percent of Gen Z and 42 percent of millennials).

**Figure 7. More than other generations, digital capabilities influence whether younger consumers choose medical providers**

<table>
<thead>
<tr>
<th>Capability</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen Xers</th>
<th>Baby Boomers</th>
<th>Silent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy access to my test results (e.g., mobile or online)</td>
<td>40%</td>
<td>44%</td>
<td>29%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>Receive reminders via email or text message, when it is time for preventative or follow-up care</td>
<td>40%</td>
<td>37%</td>
<td>28%</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>Request prescription refills electronically</td>
<td>38%</td>
<td>42%</td>
<td>40%</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>Communicate with your provider through secure email</td>
<td>25%</td>
<td>37%</td>
<td>28%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>Online access to my electronic medical records</td>
<td>35%</td>
<td>40%</td>
<td>43%</td>
<td>32%</td>
<td>25%</td>
</tr>
<tr>
<td>Use remote or tele-monitoring devices to monitor and record your own health indicators</td>
<td>25%</td>
<td>30%</td>
<td>24%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Book, change, or cancel appointments online</td>
<td>19%</td>
<td>36%</td>
<td>40%</td>
<td>34%</td>
<td>24%</td>
</tr>
<tr>
<td>Communicate with your provider through video conferencing</td>
<td>18%</td>
<td>29%</td>
<td>25%</td>
<td>24%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Q: If you were choosing a new or adding an additional medical provider, would being able to use the following electronic capabilities increase your likelihood of choosing that provider? *Much more likely* responses only

Source: Accenture 2019
CARE BEYOND THE DOCTOR’S OFFICE IS GAINING GROUND

Non-traditional services are gaining popularity

Non-traditional care delivery services are making rapid inroads. Roughly 29 percent of US respondents say they have used some form of virtual care (an increase from 21 percent in 2017), and walk-in/retail clinics have already gone mainstream (47 percent). Many of those who have not used non-traditional care delivery services would be willing to do so.

Figure 8. Many are using non-traditional healthcare services

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outpatient/Day surgery hospitals</td>
<td>57%</td>
</tr>
<tr>
<td>Walk-in or retail clinic</td>
<td>47%</td>
</tr>
<tr>
<td>Virtual care</td>
<td>29%</td>
</tr>
<tr>
<td>On-demand healthcare service</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q: Which of the following services have you used (in primary, specialist, and/or mental care)?

Source: Accenture 2019
Consumers choose non-traditional for certain needs

Choice of non-traditional healthcare surpasses traditional for cold/virus treatment (65 percent vs. 48 percent), flu shots (62 percent vs. 54 percent) and checking vitals (59 percent vs. 54 percent). However, use of non-traditional healthcare remains high across numerous other areas including vaccinations (52 percent), mental health treatment (42 percent), STD screenings and treatment (38 percent) and major surgery (36 percent).

Figure 9. For certain services, consumers are also seeking out non-traditional

<table>
<thead>
<tr>
<th>Service</th>
<th>Non-traditional</th>
<th>Traditional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold/virus treatment</td>
<td>65%</td>
<td>48%</td>
</tr>
<tr>
<td>Physical injury</td>
<td>55%</td>
<td>59%</td>
</tr>
<tr>
<td>Minor surgery (e.g., tonsillectomy, biopsy)</td>
<td>44%</td>
<td>68%</td>
</tr>
<tr>
<td>Routine therapy/mental health</td>
<td>42%</td>
<td>68%</td>
</tr>
<tr>
<td>Sexually transmitted disease (STD) screenings and treatment</td>
<td>38%</td>
<td>71%</td>
</tr>
<tr>
<td>Major surgery (e.g., appendectomy)</td>
<td>36%</td>
<td>72%</td>
</tr>
</tbody>
</table>

Q: Which services would you seek out at the following providers? (Non-traditional includes virtual care, on-demand care and clinics.)

Interest in virtual care is higher among consumers with more complex needs

Virtual care has become an appealing channel for consumers with more complex needs. For example, they would seek out routine therapy/mental health (26 percent, compared to 20 percent of other consumers), physical injury treatment (24 percent, compared to 11 percent of other consumers) and sexually transmitted disease screenings/treatment (23 percent compared to 11 percent of other consumers).

Figure 10. Consumers with complex needs seek out virtual care more often than others

<table>
<thead>
<tr>
<th>Service</th>
<th>Non-traditional</th>
<th>Traditional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routine therapy/mental health</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Addiction treatment (e.g., tobacco, opioids)</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Physical injury such as sprained ankle, backaches, etc.</td>
<td>24%</td>
<td>11%</td>
</tr>
<tr>
<td>Sexually transmitted disease (STD) screenings and treatment</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>Reproductive health (e.g., birth control exams)</td>
<td>20%</td>
<td>11%</td>
</tr>
<tr>
<td>Dermatology</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Routine cancer screenings</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Annual physical</td>
<td>11%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Q: Which services would you seek out at the following healthcare providers? Answers for virtual care only

Source: Accenture 2019
Retail walk-in clinics are going **mainstream**

Nearly half (47 percent) of consumers have used a walk-in or retail clinic for different purposes. There is little distinction between consumer preferences for using walk-in channels for flu shots (55 percent vs. 54 percent who would use traditional channels), cold and virus treatment (47 percent vs. 48 percent) or physical injury such as a sprained ankle or backache (41 percent vs. 59 percent). More than one-fifth (21 percent) of US consumers would visit a walk-in clinic for a minor surgery.

*Source: Accenture 2019*
HEALTHCARE “IN THE NEW”

With consumer preferences and behaviors changing all the time, providers and payers must stay one step ahead of the shifts.

NEW CONSUMERS. Healthcare consumers of all generations are more open to non-traditional services. Younger consumers are least satisfied with traditional care models.

NEW DEMANDS. People of all ages expect transparent, convenient and high-quality care. They also expect digital capabilities.

NEW MODELS. Non-traditional care delivered via walk-in or retail clinics and virtually is becoming increasingly popular.

NEW OPPORTUNITIES. As more patients use, and are satisfied with non-traditional care settings, payers and providers must adapt and consider greater use of digital capabilities, self-service options and more convenient physical locations.

Source: Accenture 2019
Accenture 2019 Digital Health Consumer Survey

Accenture commissioned a seven-country survey of 7,993 consumers aged 18+ to assess their attitudes toward traditional and non-traditional healthcare service delivery, including walk-in or retail clinics, virtual health, on-demand services and digital therapeutics. It is the latest in a series of annual health technology surveys tracking the perspectives of consumers, with a particular focus this year on responsibility for health and wellness, healthcare service delivery and digital healthcare data. The online survey included consumers across seven countries: Australia (1,036), England (1,014), Finland (853), Norway (812), Singapore (925), Spain (1,015) and the United States (2,338). The survey was conducted by Oxford Economics on behalf of Accenture between November and December 2018. Where relevant, the survey uses select findings from the Accenture 2016 Consumer Survey on Patient Engagement and Accenture 2017 Consumer Survey on Virtual Health.

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