To serve the aging population, Medicare plans must pursue digital channels to influence buying behavior, engagement and satisfaction:

**SATISFACTION**
Digital can improve healthcare quality with a more seamless, collaborative health ecosystem.
Simplified, accessible customer experiences that can be shared via social networks.

**ENGAGEMENT**
Digital dialogue can mean better outcomes and healthier living.
Reduce medical costs and improve retention.

**BUYING BEHAVIOR**
Digital is nonnegotiable for customer preference and differentiation.
Price, value and brand are also becoming increasingly important for acquisition.

What eHealth options do seniors expect from their care provider?

<table>
<thead>
<tr>
<th>EHealth Option</th>
<th>% of Seniors Expecting It</th>
<th>% of Seniors Doing It Today</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing your medical information</td>
<td>83%</td>
<td>28%</td>
</tr>
<tr>
<td>Booking appointments online</td>
<td>68%</td>
<td></td>
</tr>
<tr>
<td>Requesting prescription refills</td>
<td>67%</td>
<td>46%</td>
</tr>
<tr>
<td>Emailing with providers</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Seeing a doctor virtually</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Accessing electronic health records and medical history</td>
<td>53%</td>
<td>42%</td>
</tr>
</tbody>
</table>

The 2013 Accenture Consumer Survey on Patient Engagement surveyed more than 9,000 adult consumers in nine countries, including almost 200 US seniors, and revealed that:

According to the Pew Internet & American Life Project, Internet use rates tripled among seniors (65 and over) and doubled among 50 to 64 year olds between 2000 and 2012.

According to Accenture research:

- Most Americans 65 and older say that accessing their medical information online is very or somewhat important.
- Seeing a doctor virtually without a copay is most important.
- Booking appointments electronically with a mobile app is almost as important.
- Nearly one-third frequently login to Facebook or other social media sites.
- 56% of Medicare consumers visited their health plan’s website at least once in the past 12 months.

"Silver Surfers are Catching the eHealth Wave"

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Methodology

For the 2013 Consumer Survey on Patient Engagement, Harris Interactive, on behalf of Accenture, conducted consumer research with 9,015 adults across nine countries (Australia, Brazil, Canada, England, France, Germany, Singapore, Spain and the United States), including about 200 U.S. seniors (ages 65+). We assessed their perceptions of using digital tools to manage their own healthcare. As part of Accenture's 2013 Healthcare Consumer Research, a separate survey of 3,137 U.S. seniors, including 1,470 Medicare recipients and 1,667 individuals ages 55 to 64 years-old, was conducted in July 2013 to assess the perceptions of current and future seniors using digital capabilities for managing their care remotely. Where relevant, these findings were compared to Accenture’s 2012 Healthcare Consumer Research.

To learn more about the importance of digital channels in engaging seniors, download the "Silver Surfers are Catching the eHealth Wave" report at http://www.accenture.com/us-en/Pages/insight-silver-surfer-catching-ehealth-wave-summary.aspx