TODAY'S CONSUMERS REVEAL THE FUTURE OF HEALTHCARE

Accenture 2019 Digital Health Consumer Survey

US Results

accenture consulting

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

1 THE NEW HEALTHCARE CONSUMER IS HERE

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)	**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)
85% **Silent Generation** (born 1928 to 1945)	**4%** **Silent Generation**
84% **Baby Boomers** (born 1946 to 1964)	**4%** **Baby Boomers**
76% **Gen Xers** (born 1965 to 1980)	**8%** **Gen Xers**
67% **Millennials** (born 1981 to 1996)	**14%** **Millennials**
55% **Gen Z** (born 1997 onward)	**20%** **Gen Z**

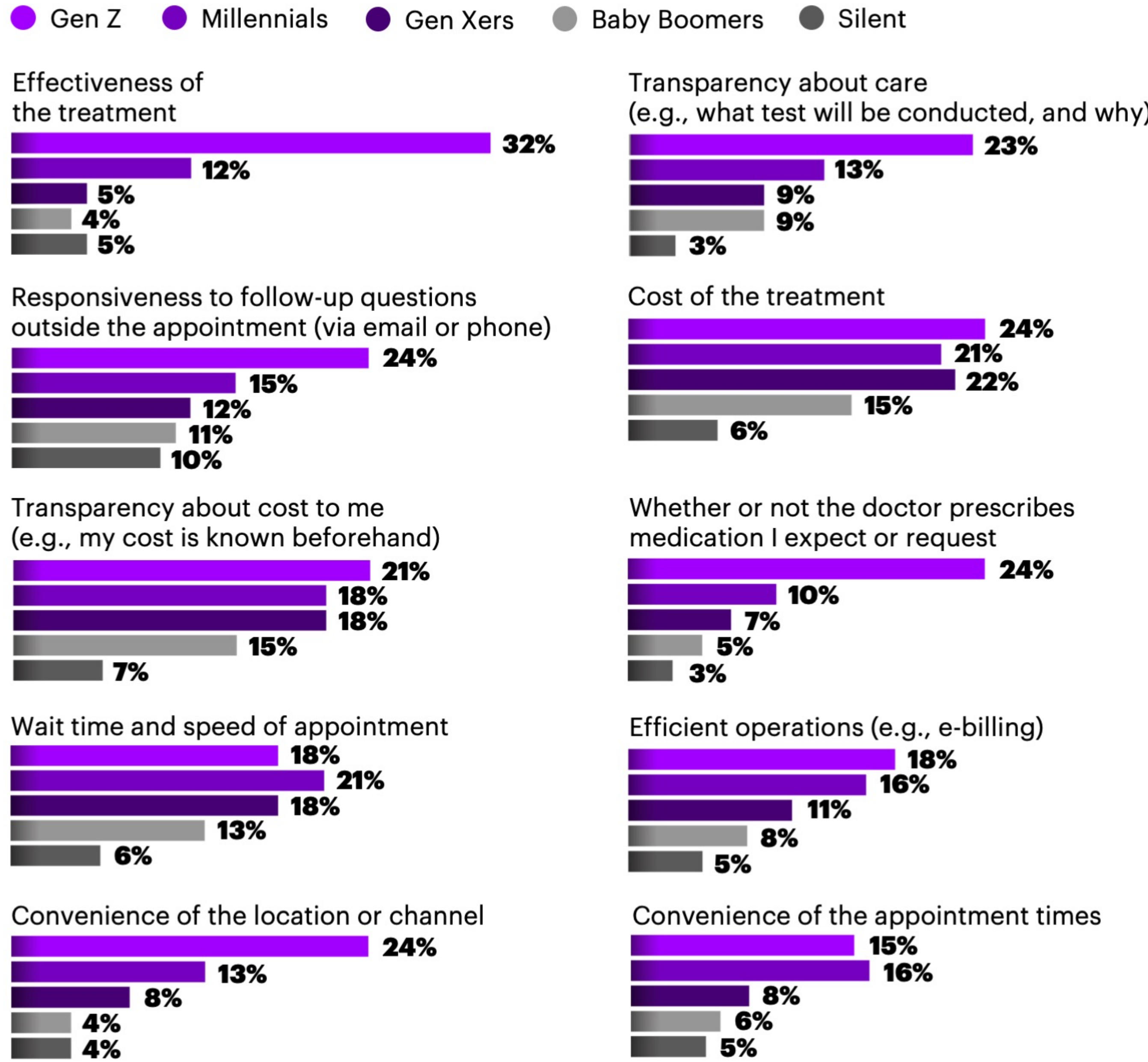
Q: Which of the following apply to you?

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



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*

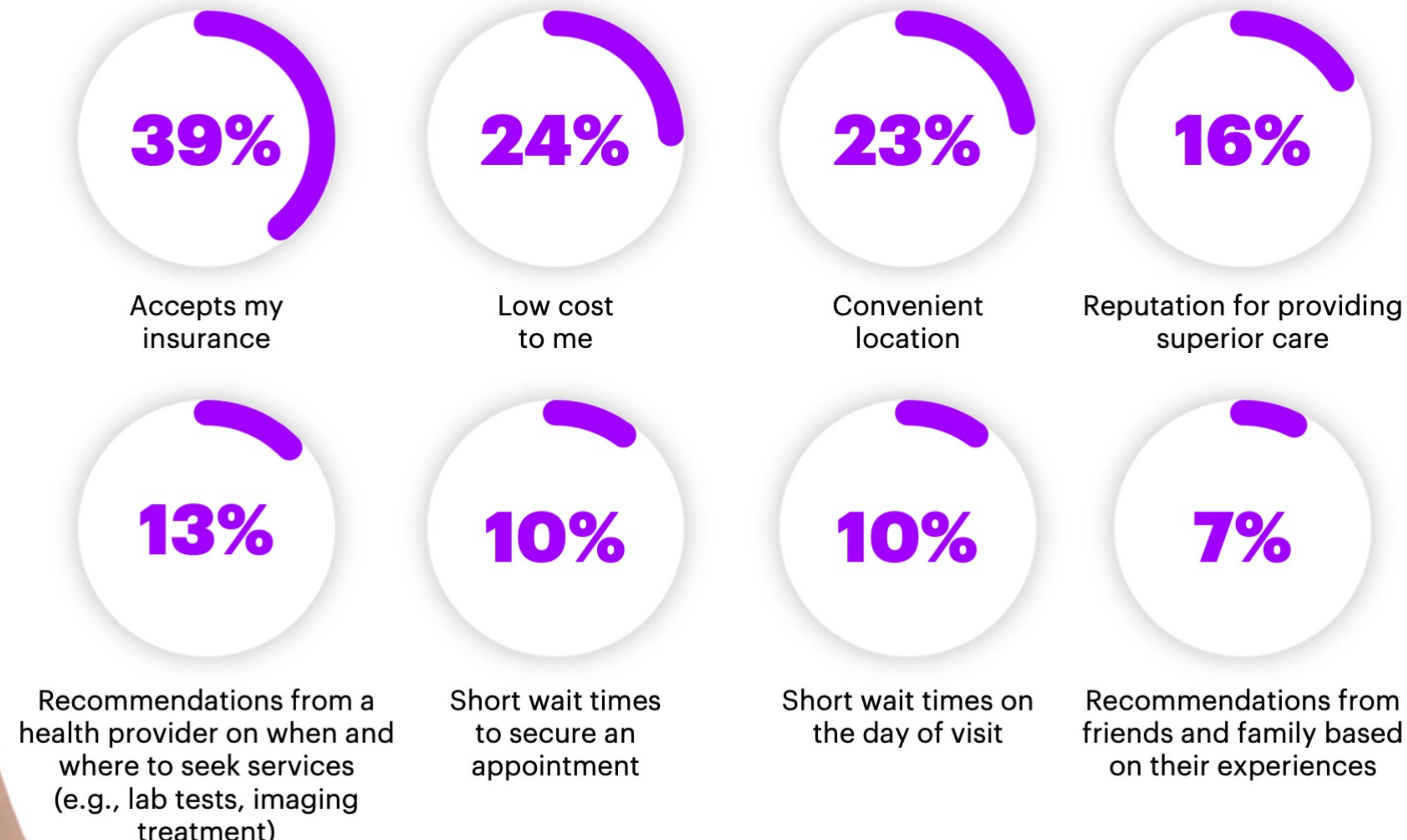
Source: Accenture 2019

2 EVOLVING PREFERENCES ACROSS ALL AGES SHOW A NEED FOR TRANSFORMATION

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



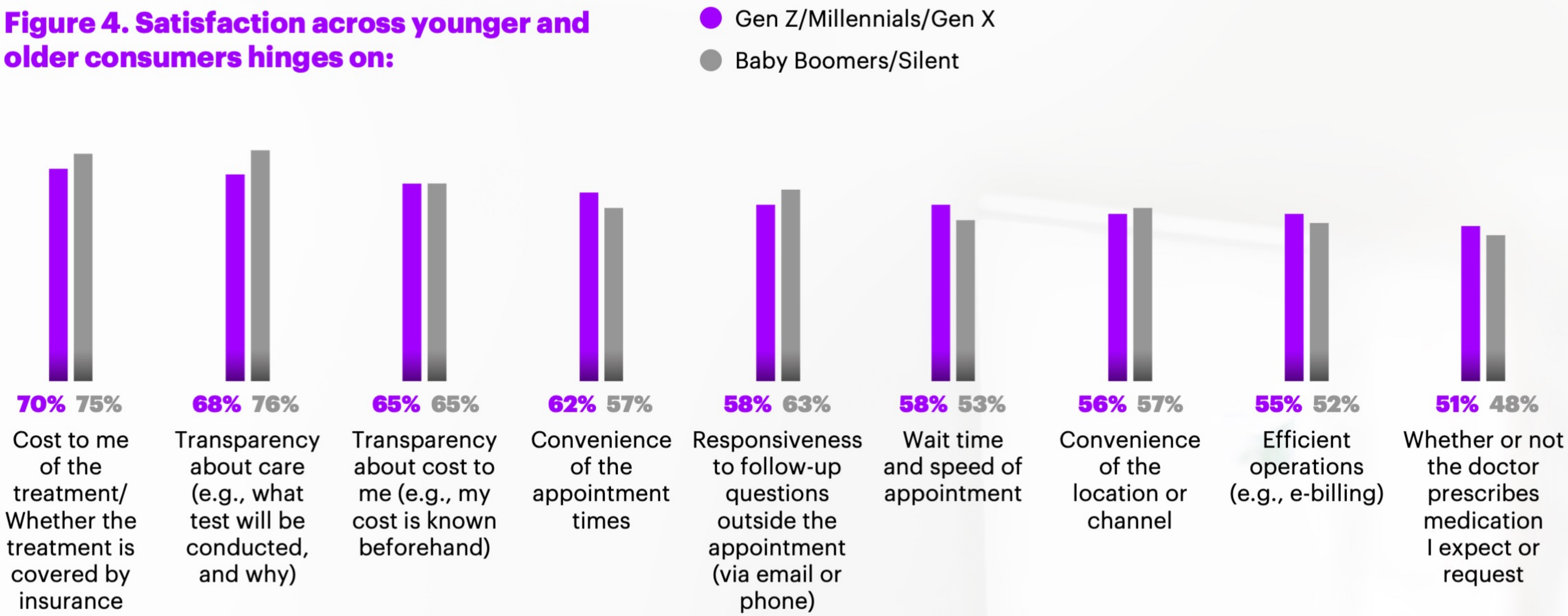
Q: Which of the following factors most influence your decisions about when and where to seek medical treatment or services? *Rank 1 + Rank 2 responses*

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:

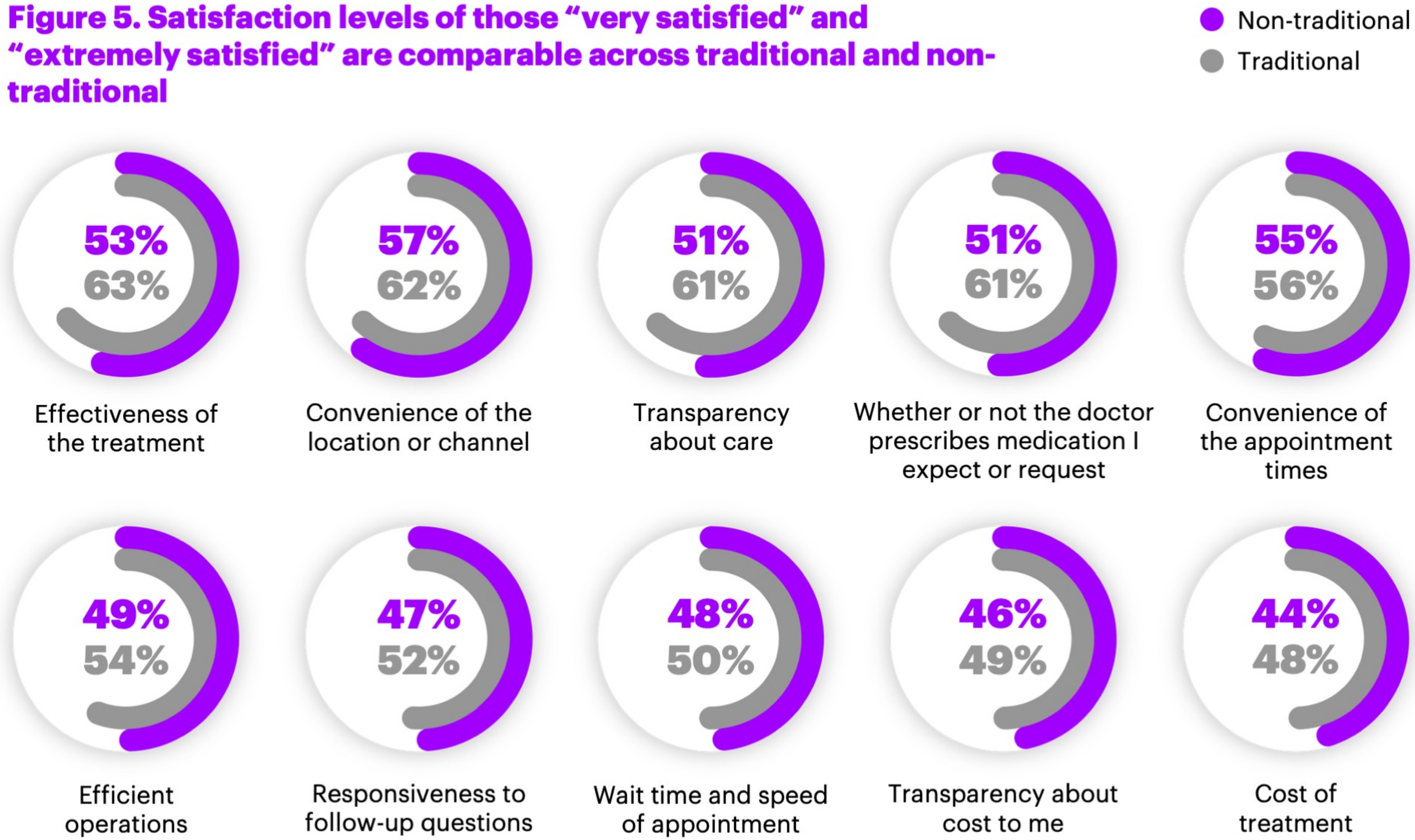


Q: How important are the following factors in determining your satisfaction with the healthcare services you receive? *"Critically important" and "Very important" responses*

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



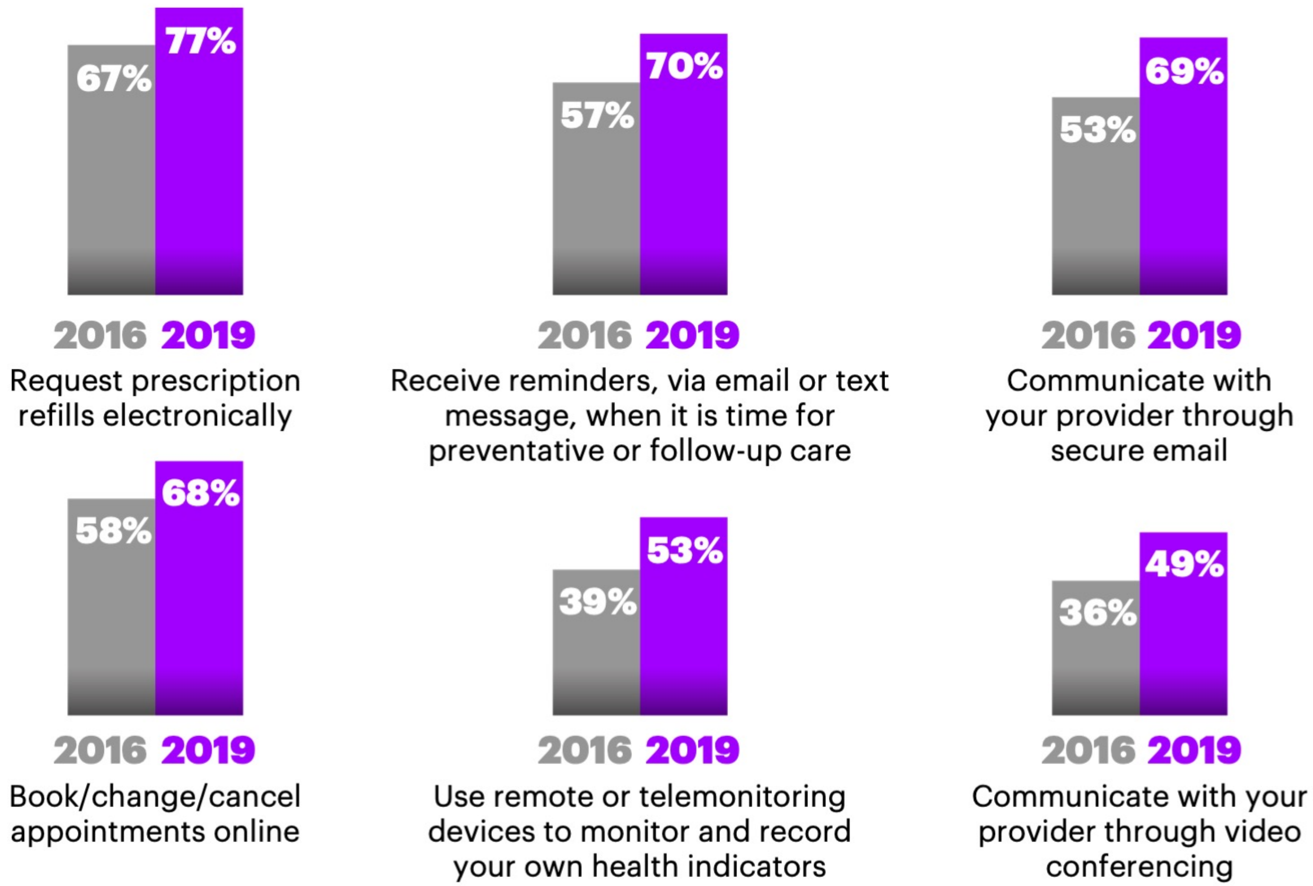
Q: Thinking about the healthcare services you have used, how satisfied are you with the quality of those services? *“Very satisfied” and “Extremely satisfied” responses*

Source: Accenture 2019

Expectations for digital capabilities are on the rise

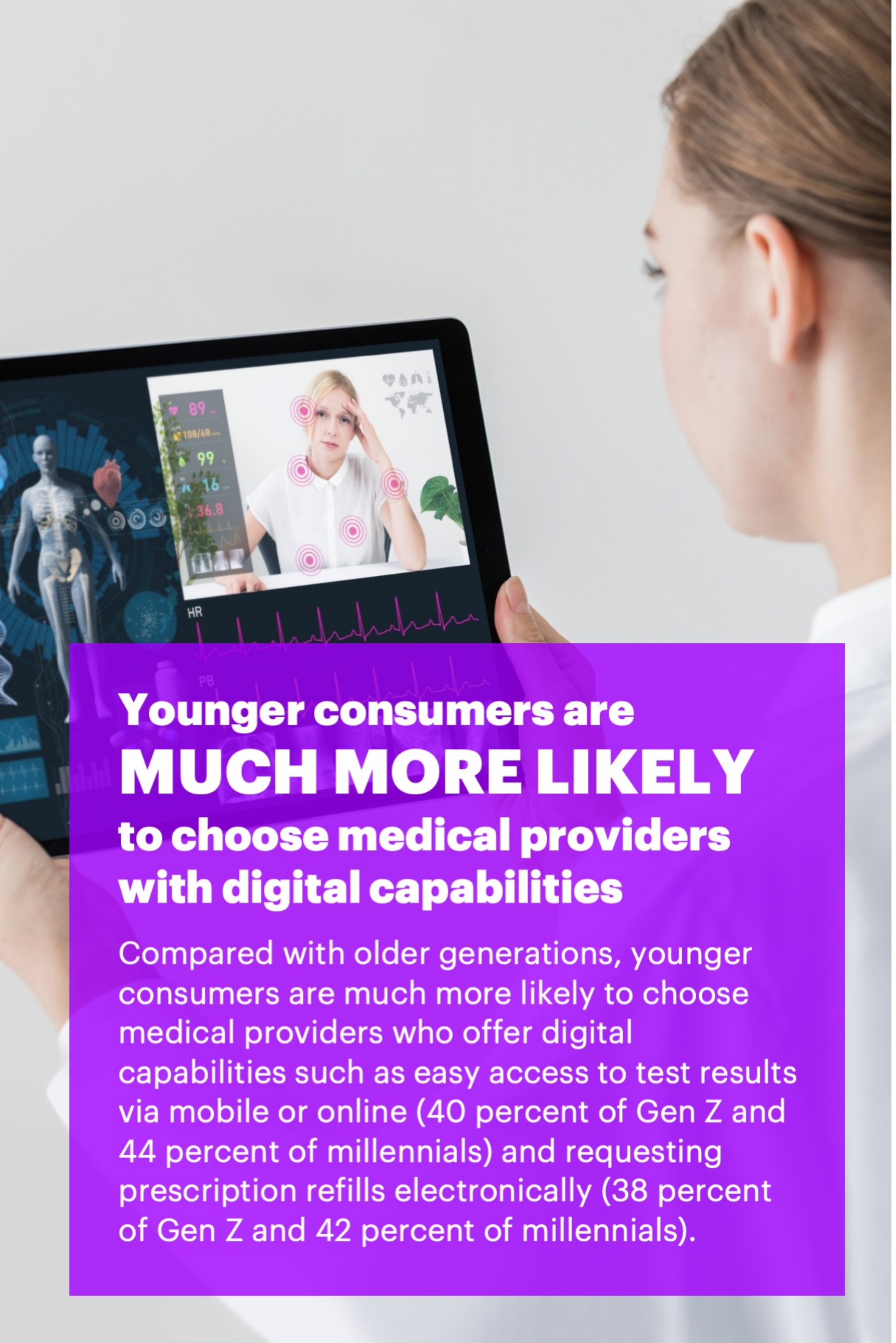
More than half of patients surveyed expect digital capabilities—from requesting prescription refills to booking appointments. These expectations increasingly influence who these patients choose in a provider. For instance, in 2019, 70 percent are more likely to choose a provider that offers reminders 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*

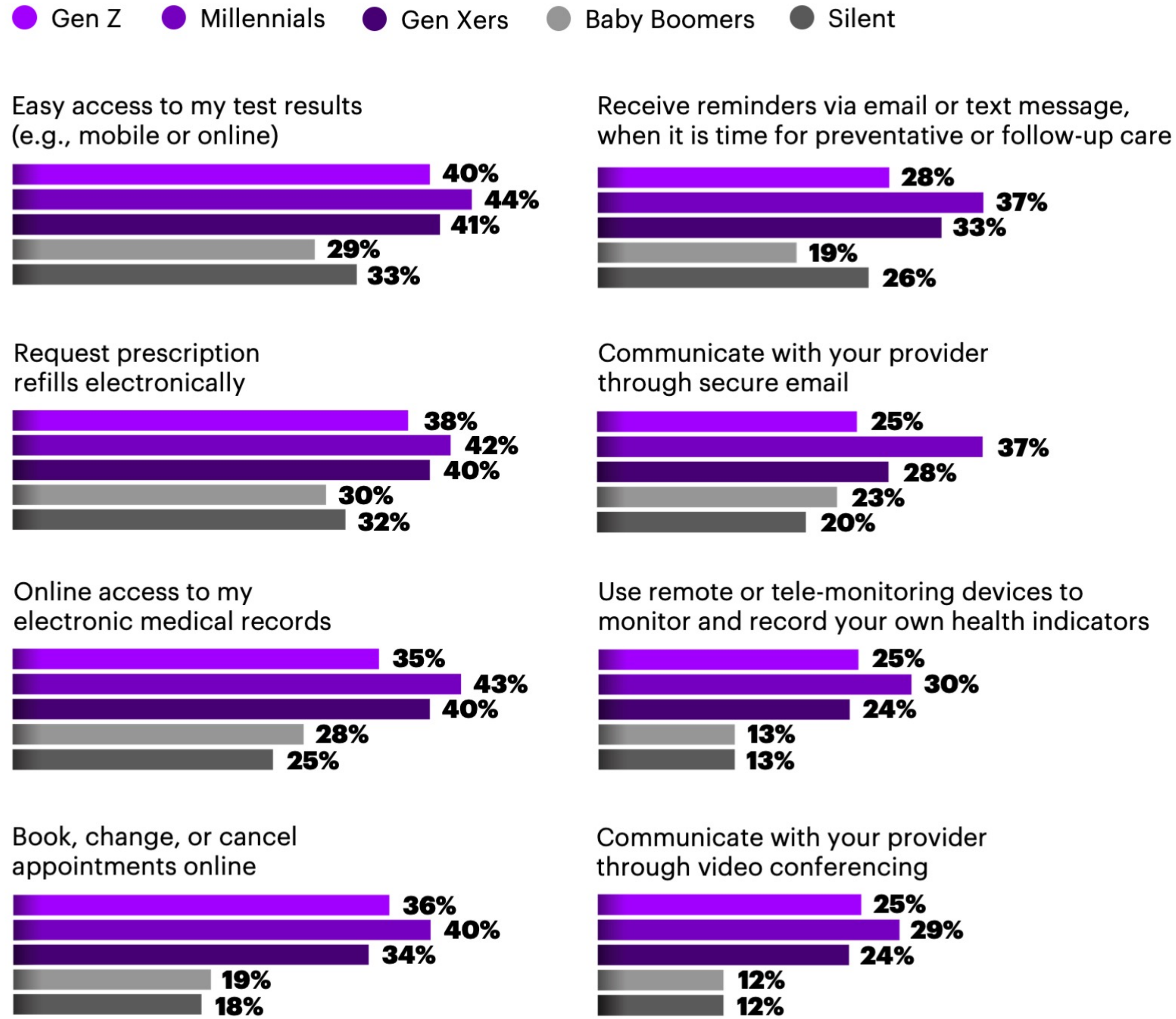
Source: Accenture 2019



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



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*

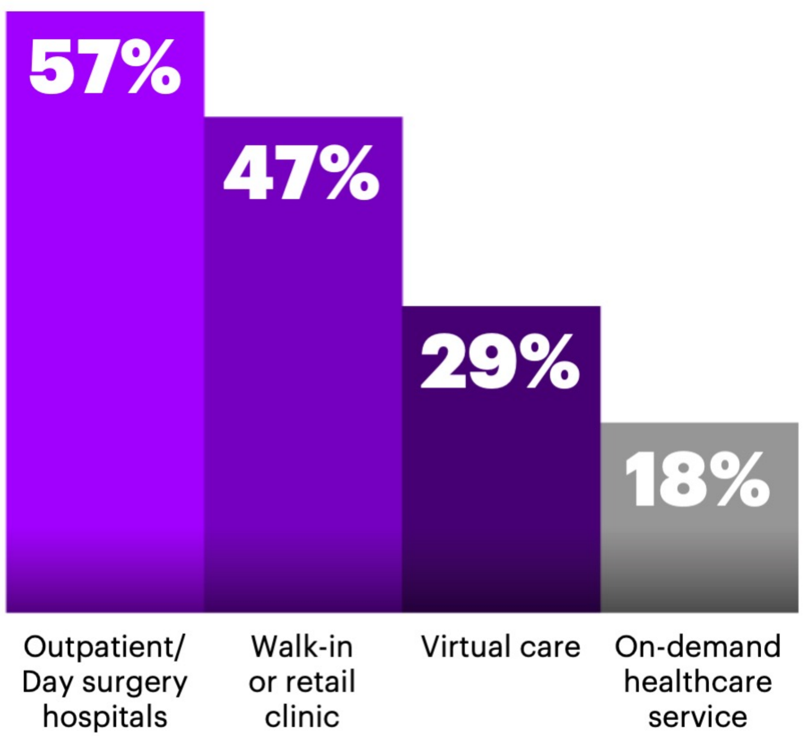
Source: Accenture 2019

3 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



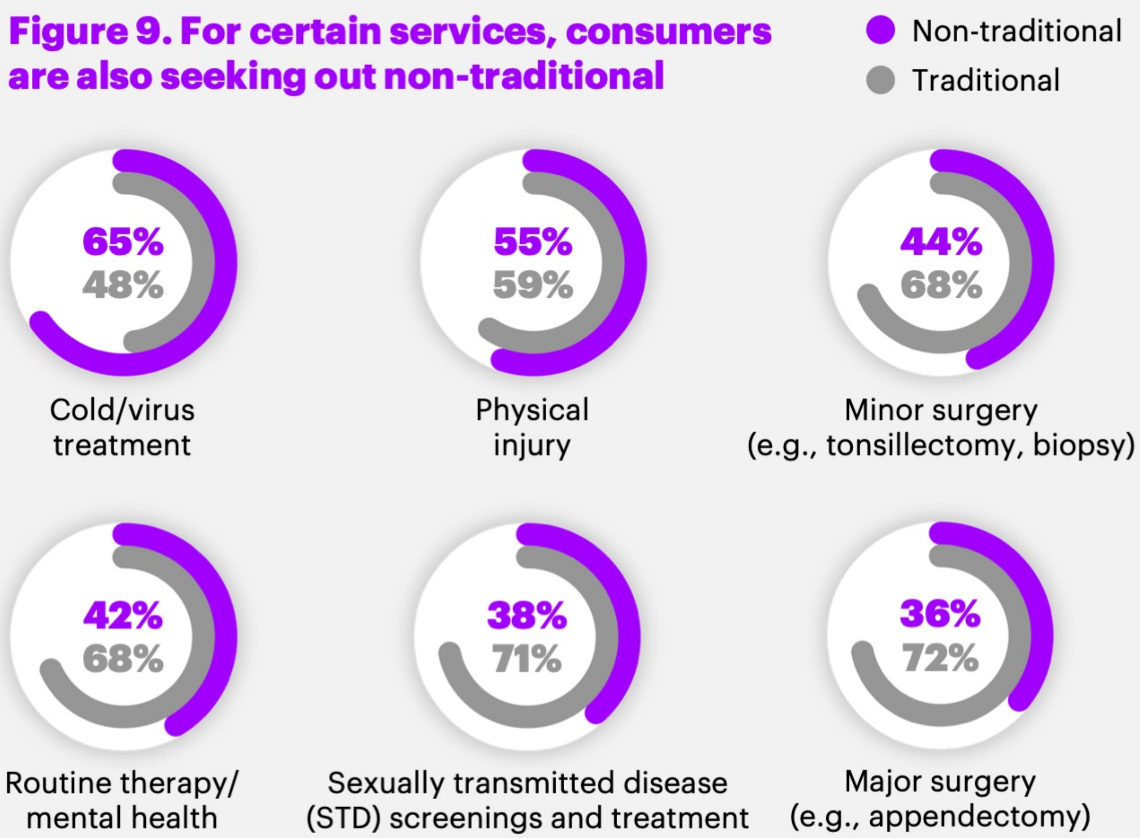
Q: Which of the following services have you used (in primary, specialist, and/or mental care)?

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

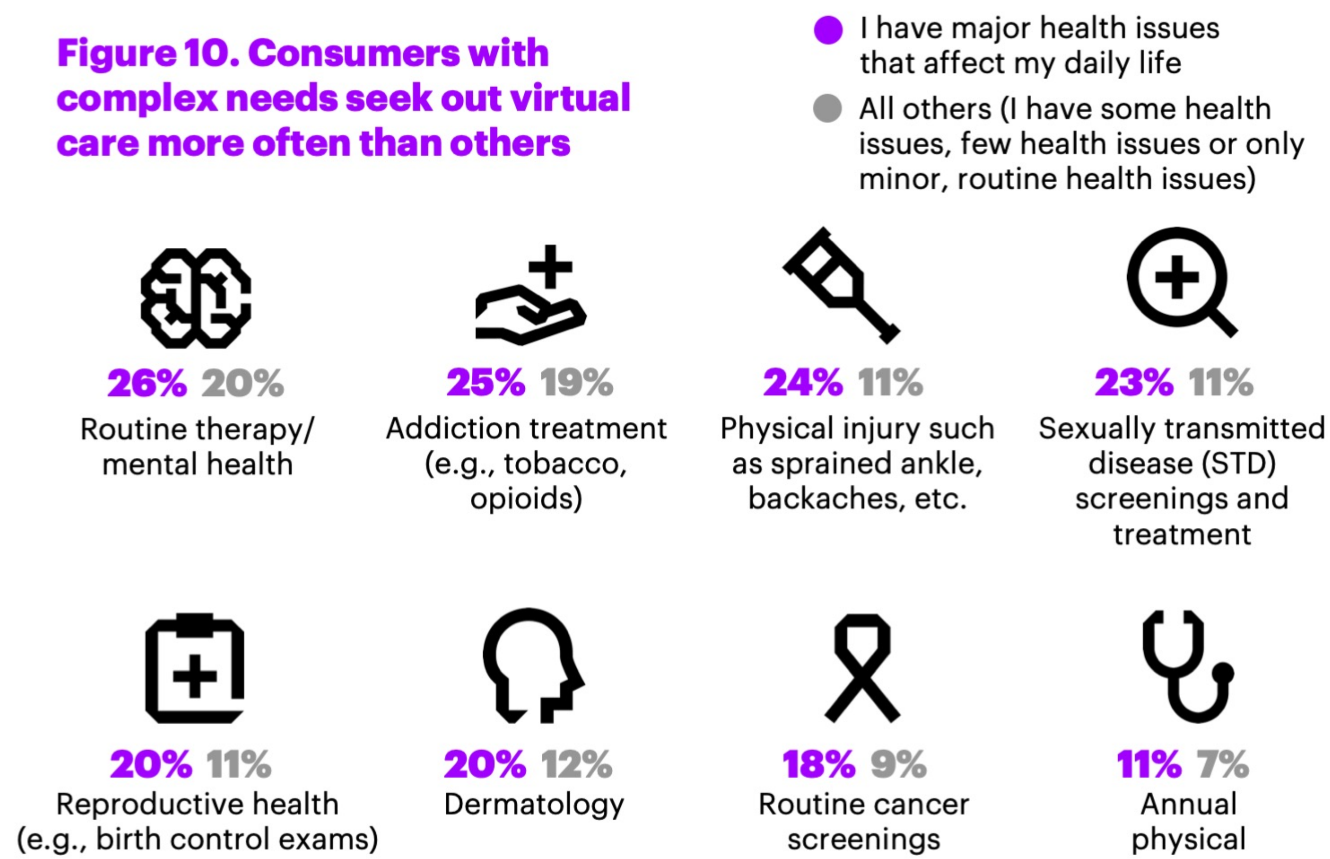


Q: Which services would you seek out at the following providers? (Non-traditional includes virtual care, on-demand care and clinics.)

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



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**

47%

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

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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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