accenture

HOW CAN LEADERS MAKE RECENT DIGITAL HEALTH GAINS LAST?

Re-Examining the Accenture 2020 Digital Health Consumer Survey

US FINDINGS

Executive summary

The global pandemic greatly accelerated the adoption of digital healthcare—but will it persist? The Accenture 2020 digital health consumer research showed the rapid rise of digital health had stalled. Now, COVID-19 may serve to resume the growth.

With most in-person care visits on hold, use of virtual care services exploded during the crisis. Nearly overnight, digital healthcare was infused into the clinical workday as patients and providers alike were forced to become fast adopters.

While digital healthcare has accelerated, we found that the themes of our 2020 research still ring true: consumers are interested in virtual services, but a cumbersome digital experience turns them off. Concerns over privacy, security and trust remain, along with difficulty integrating new tools and services into day-to-day clinical workflows.

How can recent gains in digital healthcare be made permanent?

As in-person care resumes, providers, payers and consumers can seize the opportunity to maintain the momentum created by forced adoption and address the pre-crisis issues that have previously inhibited digital health adoption.

For instance, working to increase trust in virtual services as they incorporate new tools into their business and care models, addressing security and privacy concerns—which are especially important as non-medical players assume bigger roles in healthcare—and increasing access to technology for all consumers.

Our analysis focused on consumer behaviors regarding:

Virtual healthcare
includes services and support needed for wellness, diagnosis and treatment; care is available regardless of a patient's location. The provider and patient are in different locations, with support and care provided through video, mobile device apps, secure email, text/SMS messaging or online social platforms.

Digital healthcare
includes tools and technologies such as electronic health/medical records, mobile solutions, wearables that track fitness, lifestyle and vital signs, smart scales and chatbots.

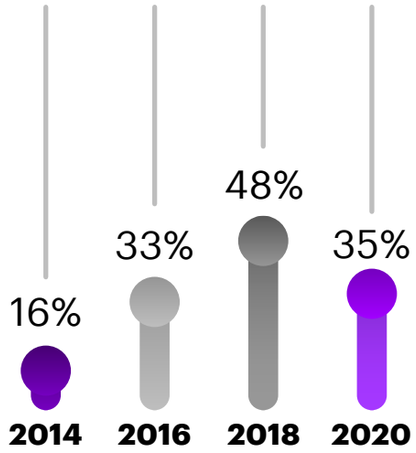
Before COVID-19, growth in consumer digital health adoption had stalled

Consumers' use of digital tools to manage their health had declined before the pandemic. In fact, one-third of US consumers surveyed (33%) were not using any digital tools to manage their health. Use of mobile devices and applications fell from nearly half (48%) using these tools in 2018 to only 35% in the 2020 study. Use of wearable technology—for instance, devices that collect health data such as fitness and vitals—has decreased from 33% in 2018 to just 18% in 2020.

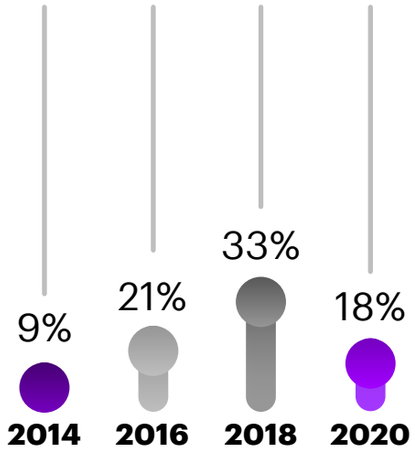
Use among younger generations dropped significantly. Mobile apps went from 63% for those ages 18-34 in 2018 to 50% in 2020, with wearables use sinking from 43% in 2018 to 26% in 2019 (not only has the fitness-tracker fad cooled, but general purpose smart watches are stealing market share). Use among those 65 years of age and older is holding steady, with 20% using mobile apps in 2019 compared to 19% in 2018, and 13% using wearables in 2019 compared to 15% in 2018.

Figure 1: Fewer consumers were using digital tools to manage their health

Mobile phone/tablet applications
(e.g., tracking personal activity/diet/fitness/ weight loss/etc.)



Wearable technology
(e.g., consumer or medical devices that collect information about an individual's health, such as fitness, vitals and lifestyle)



Q: Which of the following technology or electronic health management tools have you used to manage your health in the past year?
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

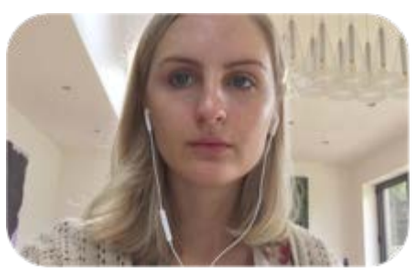
COVID-19 FORCED A SURGE

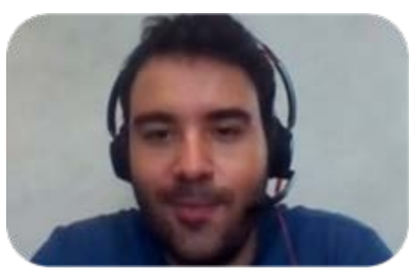
Virtual healthcare services became a necessity for millions of Americans as efforts to slow transmission of COVID-19 sharply limited face-to-face visits with doctors and other care professionals.

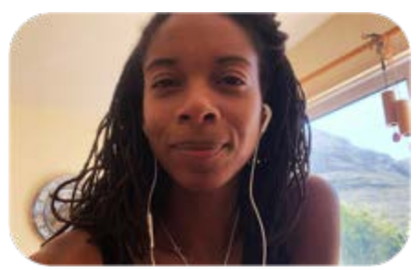
After years of incremental growth, a few consumers were already using and many considering remote care before the virus: 19% of US consumers in our survey (conducted pre-pandemic) had already received healthcare virtually, and 54% were willing to receive virtual healthcare from traditional medical care providers.

But the forced adoption of telemedicine and other services during the extended lockdown, facilitated by relaxed rules by Medicare and other insurers, introduced a vast new user base to the virtual experience. By early April, a majority of consultations already were virtual.[1] Many providers and patients quickly discovered virtual services to be more attractive than they had imagined.[2]

This historic change brings healthcare providers and payers an unprecedented chance to permanently shift the default care model to virtual services for many medical needs: going from forced to voluntary digital health adoption.







2,000%

reported increase in Amwell visits, a direct-to-consumer telemedicine app, nationwide from January to March 2020[3]

50%

reported increase in Teladoc visits in one week[4]

900%

reported increase in the use of telehealth services with Banyan Medical Systems, a virtual care provider partnered with nearly 800 hospitals[5]

12,000+

reported video visits per week at North Carolina's Novant Health—up from just 200 per week prior to COVID-19[5]

Typing...

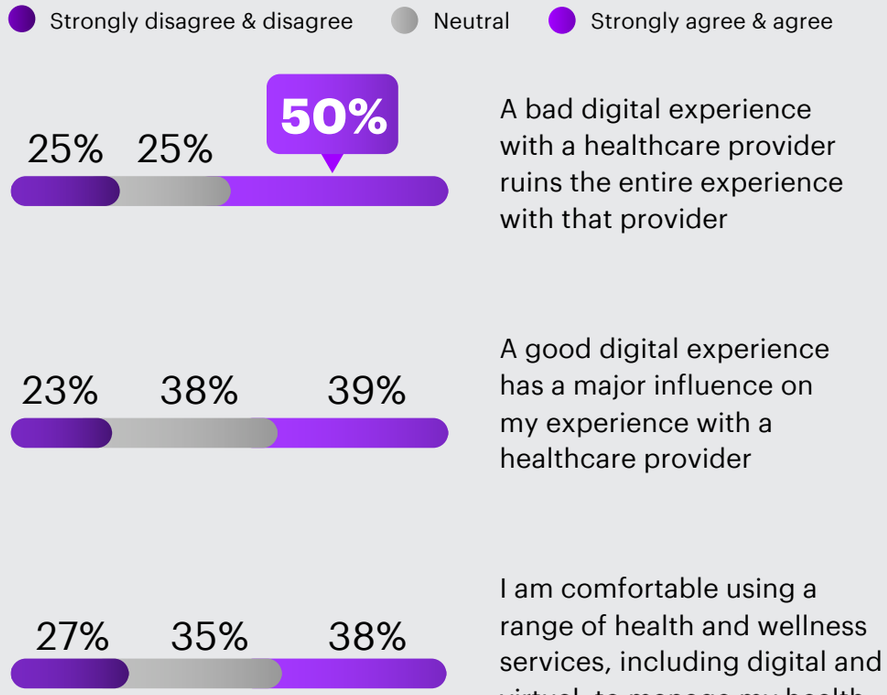
What could drive or stall post-pandemic progress

Barriers to adoption could still impede progress. Even as consumers gain confidence in digital tools and services post-pandemic, there is still work to be done to meet expectations for superior digital services. Amid the pandemic, consumers with nowhere else to turn were forced to lower their expectations for the quality of digital health experiences. But as things normalize, we believe that consumers will revert to prior expectations.

Before COVID-19, high-quality digital services mattered to consumers: Half of healthcare consumers surveyed agreed that a bad digital experience with a healthcare provider ruins the entire experience with that provider—and 39% believe a good digital interaction has a major influence on the consumer experience (Fig. 2).

At the same time, less than half of consumers in our survey said they would recommend chatbots, computers and digital devices for their ease and accuracy of communication.

Figure 2: Lackluster digital options can taint the overall experience



Q: To what extent do you agree with the following statements?

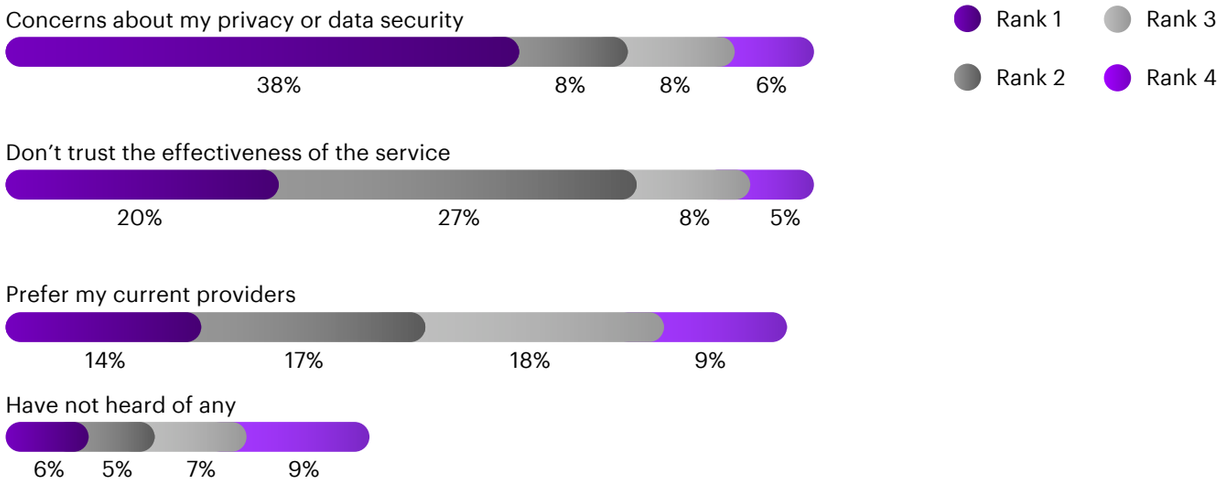
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Consumers question the privacy, security and effectiveness of digital tools

Technology has been a critical part of the response to COVID-19. Chatbots, for example, emerged as an important way of managing demand for information about symptoms, treatment and scheduling.

However, at the time of our initial research, 38% ranked "concerns about my privacy or data security" as the number one barrier to adoption of chatbots, computers or digital devices for their health questions and care. This concern—along with doubts about the effectiveness of these tools—ranked among the top four barriers for roughly 60% of those surveyed. And while 70% of respondents would recommend their physicians, nurses and physician assistants based on effectiveness of diagnosis and treatment, only 46% say the same for digital devices and services they have used.

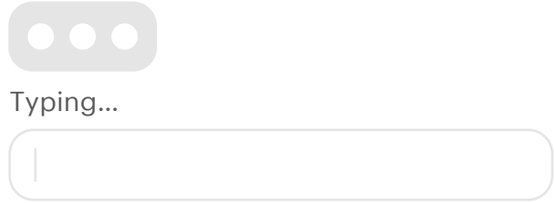
Figure 3: Many consumers doubt the effectiveness of digital tools and services



80+ telehealth services temporarily approved by the Centers for Medicare & Medicaid Services[6]

12+ million people reached through the World Health Organization's new Health Alert chatbot service on WhatsApp as of mid-April[7]

40% growth in IBM's Watson Assistant usage between February and April[8]



Q: What might keep you from using chatbots, computers or digital devices for your health questions and care?

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Consumers are not benefitting evenly from digital health

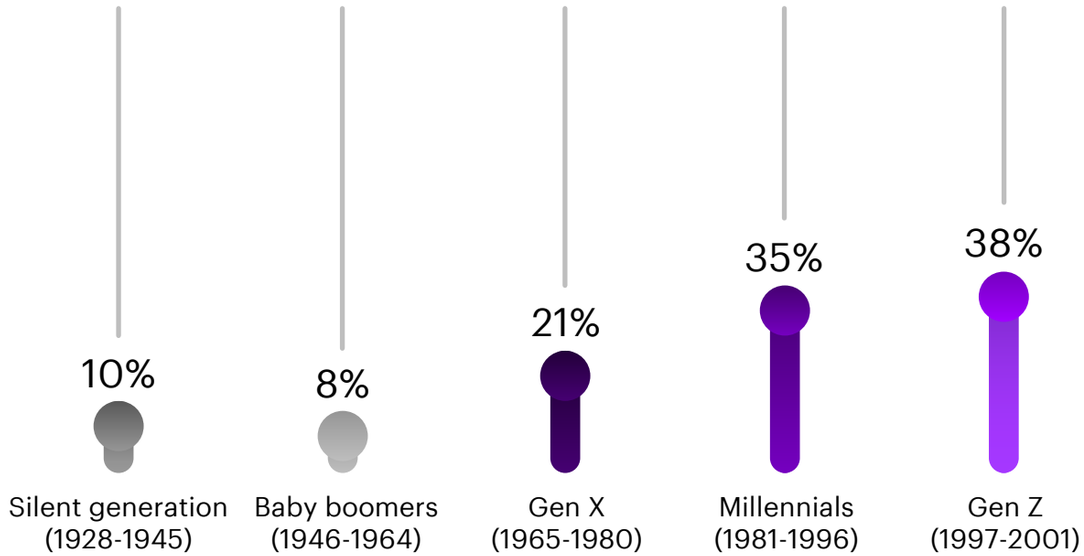
Technology diffusion, ensuring broadband access for all, and financial support for those in need can close the digital divide

Nobody is certain how long the regulatory and financial reliefs driving digital adoption will persist. Issues around access and affordability grew even more important during the crisis, adding to existing concerns about digital healthcare tools that our survey showed were widely held before the pandemic.

The COVID-19 crisis underscored the long-standing problem of a digital divide; people without computers, smartphones or broadband internet are limited in their ability to use virtual services, and many Americans lack those things—especially older people and those in rural areas. [9, 10, 11] Virtual health adoption among lower income households was much lower than those in the higher income household segments, and younger generations received virtual healthcare more than twice as frequently than elder generations (Fig. 4 and 5), already before the pandemic.

Figure 4: Virtual care has yet to go mainstream (by age)

"Yes" responses



Silent generation n=255; Baby boomers n=860; Gen X n=475; Millennials n=597; Gen Z n=115

Figure 5: Virtual care has yet to go mainstream (by income)

"Yes" responses

Annual household income less than $50k n=1,101; $50k-$100k n=801; more than $100k n=400

Q: Have you personally received any kind of healthcare virtually?

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Designing services that matter for consumers and fit in clinicians' day-to-day practice

RECOMMENDATIONS FOR HEALTHCARE ORGANIZATIONS

1 **Design services that matter.** Solutions should digitize information that is relevant and valuable to both care providers and consumers. Providers can then act on insights that matter to improve people's health. Human-centered design can help with developing services that have a deep understanding of user needs and wants. Payers and providers can co-create and explore concepts with consumers to improve service design, and then test concepts to ensure they are technologically feasible and business viable.

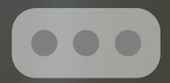
2 **Fit services into clinical practice.** COVID-19 forced digital health to fit into the clinical day-to-day. More providers gained comfort with digital. Payers and providers should review data insights to analyze what worked and what didn't and adjust digital services accordingly. Care providers, especially doctors, do not want to spend precious time that they could be applying in other areas that add value to the consumer experience. Digital and virtual health solutions can be part of processes, business models and workflows—fitting inside the way healthcare is delivered. Healthcare organizations can put in place systems that allow providers to recommend digital services to patients and collect and interpret patient data from these services.

3 **Keep accessibility in mind.** Healthcare organizations must account for cultural and socio-demographic variances. This means understanding wide variations in buying power, health literacy and digital competence—and access to broadband—and working to close those gaps.

Typing...

CONSUMERS LACK TRUST IN HOW THEIR DATA IS BEING USED

When consumers lack trust in how their data is being used, they may be less likely to use digital services. Security and privacy concerns have increased in recent years as healthcare consumers are not confident their data is being protected and used properly. Trust in technology companies has declined significantly, likely due to the proliferation of high-profile stories about data breaches, yet many younger consumers will still trust these companies to deliver health and wellness services. While consumers trust their doctors more than anyone else, there is substantial trust in non-MD care providers such as nurses, nurse practitioners and physician assistants (PAs).



Typing...

Privacy and security concerns persist

Concerns about privacy and security will resurface as forced adoption of digital health services gives way to consumer choice

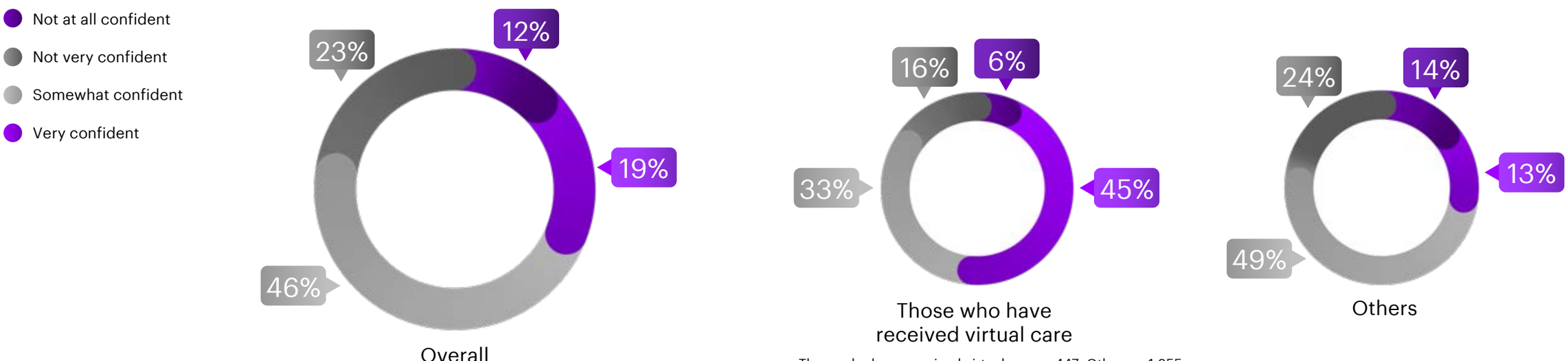
The necessities of social distancing outweigh these issues when other options for medical consultation are unavailable, but privacy and security fears hardly disappeared in the coronavirus era—concerns are overlooked.

For example, technology companies such as Google and Apple could play key roles in tracking the virus—but trust in Big Tech remains contested ground amid concerns over intrusive surveillance and lack of adequate regulation.[12]

At the same time, federal authorities have warned about fraud and identity theft tied to the increased use of virtual services,[13, 14] even as they made it much easier for millions of Americans to use those services—in some cases allowing the use of consumer technologies that do not meet HIPAA standards.[2, 15]

As the crisis eases, concerns about privacy and security must be addressed if forced adoption is to yield sustainable increases in the use of virtual healthcare services. Confidence levels of consumers who have received virtual care is significantly higher than those of who did not (Fig. 6).

Figure 6: Do consumers trust that their data is used appropriately?



Those who have received virtual care n=447; Others n=1,855

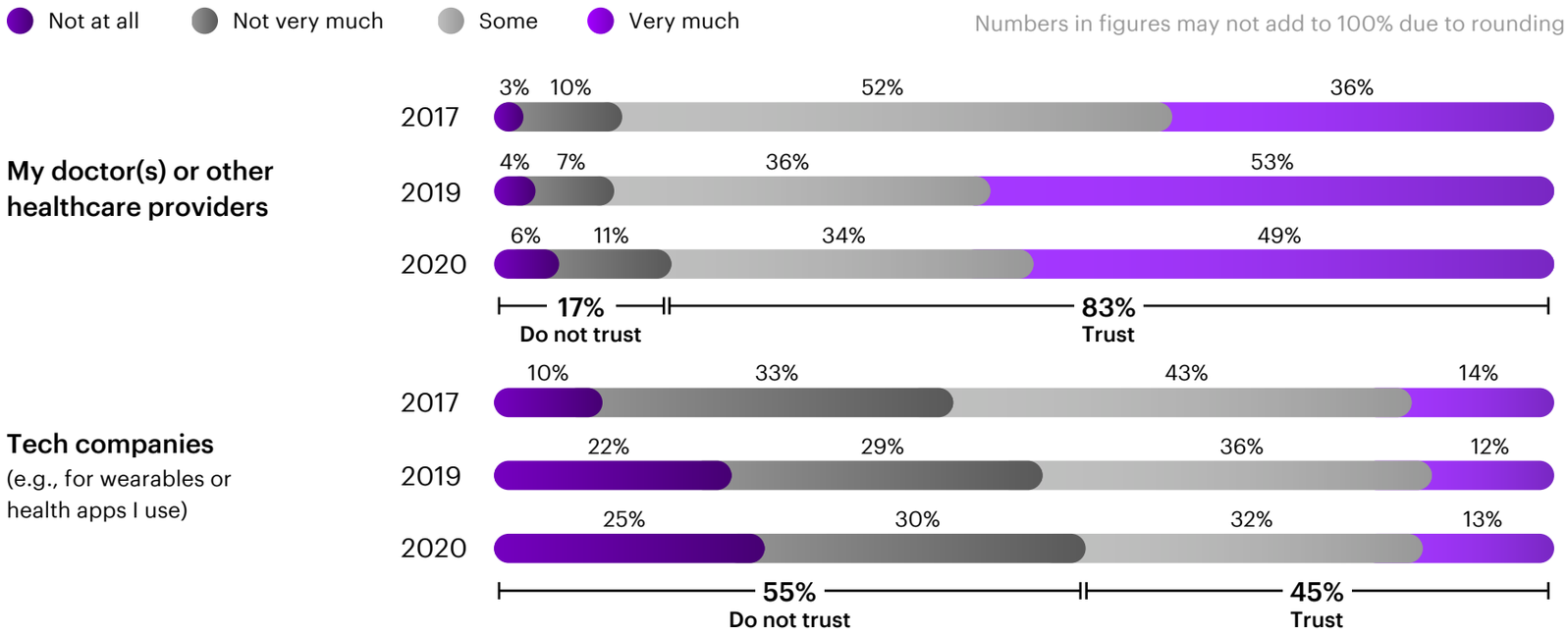
Q: Overall, how confident are you that your digital healthcare data is being used responsibly and in your best interest?

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Many consumers have lost trust that their health information is secure

In 2019, 89% of healthcare consumers trusted their doctor or other provider "very much" or "some" to keep their digital healthcare information, such as electronic medical records, secure. That percentage dropped to 83% in 2020. Trust in tech companies has also declined. More than half of consumers (55%) do not trust these companies to keep digital health information secure. When asked "how much do you trust each of the following organizations or people to keep your digital healthcare information secure," doctors ranked as second-most trusted (83%)—following hospitals (84%)—whereas tech companies ranked second to last (45%).

Figure 7: Consumers have less trust in tech companies and doctors to keep information secure



Q: Overall, how much do you trust each of the following people or organizations to keep your digital healthcare information (including electronic medical records and other information) secure?

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Figure 8: Trust in hospitals and doctors to keep digital healthcare information secure is high, but drops significantly for tech companies and government

84%
Hospitals I visit

83%
My doctor(s) or other healthcare providers

82%
My pharmacy

80%
Labs that process my medical tests

75%
My health insurance company

74%
Urgent care or walk-in retail clinics I visit

63%
Non-medical staff at my doctor's or healthcare provider's office

45%
Tech companies

38%
Government

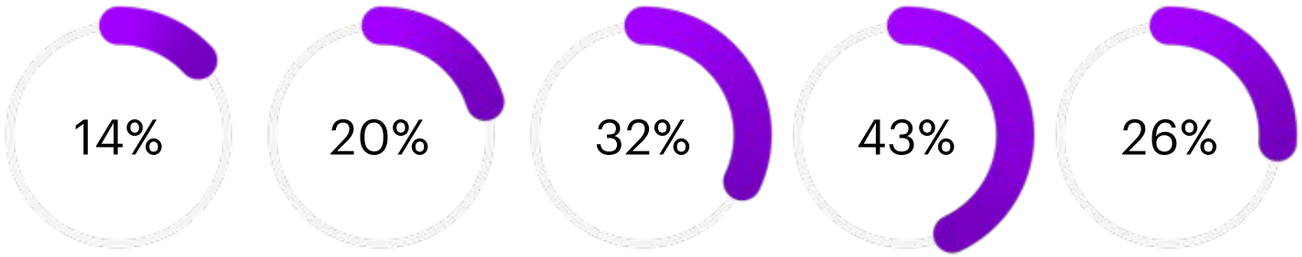
Q: Overall, how much do you trust each of the following people or organizations to keep your digital healthcare information (including electronic medical records and other information) secure? "Very much" and "Some" responses.

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Younger generations have greater trust in tech companies

While trust in technology companies' security measures has declined overall, younger generations are more inclined to trust their services. Nearly one-third of Gen X (32%) and 43% of millennials trust tech companies for health and wellness services, compared to only 20% of baby boomers and 14% of the silent generation.

Figure 9: Millennials trust health and wellness services offered by a tech company (rather than a traditional provider) more than other generations



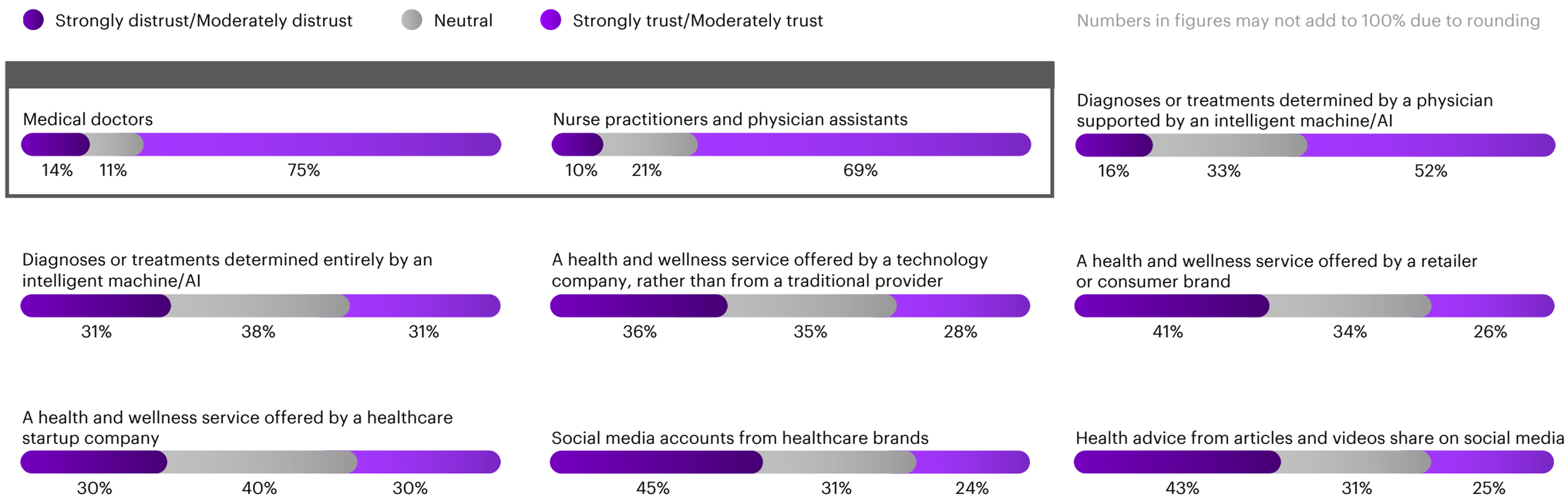
Q: To what extent do you trust the following? "Strongly" and "Moderately trust" responses. Silent generation n=255; Baby boomers n=860; Gen X n=475; Millennials n=597; Gen Z n=115

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

People trust providers, but less so when technology is involved

Perhaps not surprisingly, doctors are the most trusted actors in the healthcare ecosystem—75% of consumers "moderately" or "strongly" trust medical doctors. Nurse practitioners and physician assistants (PAs) follow close behind with 69% of consumers having trust in these providers. These percentages drop when technology is involved. Just over half (52%) trust diagnoses or treatments determined by a physician supported by an intelligent machine or artificial intelligence (AI); only 31% trust diagnoses or treatments determined entirely by these technologies.

Figure 10: Consumers trust clinicians (doctors, nurses, and physician assistants) most



Q: To what extent do you trust the following?

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Building confidence in virtual health by making privacy and security top priorities

RECOMMENDATIONS FOR HEALTHCARE ORGANIZATIONS

1 **Foster trusted relationships.** Healthcare data is highly sensitive, and organizations should consider doing whatever they can to protect. Established medical practitioners and new entrants in the healthcare market can build confidence for engaging with the virtual healthcare system, post COVID-19, by making security and privacy top priorities.

2 **Be transparent.** Healthcare organizations can be clear and transparent to consumers about how data is collected and used. And they can build confidence in devices by establishing the trustworthiness of a device before granting it access to network resources. Trust deepens once consumer see how providers ensure strong security also for ongoing operations. Ecosystem participants bring unique strengths and talents and can work together to shape stronger digital solutions.

3 **Choose a top leader.** Identify a highly respected executive within the organization (e.g. chief security officer, chief digital officer, chief ethics officer) who is responsible for building and maintaining trust, digital ethics and security with vendors, partners and consumers. These critical matters need steer by top management and cannot be delegated.

Typing...

CONSUMERS ARE INTERESTED IN COMPREHENSIVE VIRTUAL CARE

Before the pandemic drove adoption, consumers already showed strong interest in a wide variety of virtual health services. Younger generations even prefer virtual over in-person care in some cases, when given the choice. And although consumers would be willing to receive virtual services from traditional care providers, they are also open to receiving virtual services from tech companies and retail brands. These numbers will likely rise as digital-savvy generations come of age.

Typing...

Beyond the urgency that drove adoption during the pandemic, consumers want virtual care services

If given the option, many healthcare consumers would choose virtual for basic care services, and even for specialty care. Many say they “definitely” or “probably” would receive health and wellness advisories (62%) or remote monitoring of ongoing health issues through at-home devices (57%) and more than half (52%) would choose virtual for routine appointments. Many are open to receiving diagnoses virtually—42% for illnesses, diseases and disorders and 44% for appointments with medical specialists for diagnosis or acute care.

Figure 11: Consumers are open to virtual care—from basic to specialty services

62%
Health and wellness advisories

57%
Remote monitoring of ongoing health issues through at-home devices

52%
Routine appointments

46%
Mental health appointments

45%
Appointments with medical specialists from chronic conditions

44%
Appointments with medical specialists for diagnosis or acute care

42%
Diagnoses for illnesses, diseases and disorders

Q: Which of the following would you do virtually if given the choice? “Definitely” and “Probably would do virtually” responses.
2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Getting doctors to sustainably buy into digital health could have a big impact on adoption

Before necessity drove a surge in virtual services, nearly a quarter of healthcare consumers surveyed (23%) said reliable and secure digital tools that help them to understand their health habits would motivate them to take a more active role in managing their health. Yet only 11% said their healthcare providers recommend digital tools for patient health management.

Physicians and other clinical practitioners can help maintain the crisis-era momentum as consumers look to them for motivation. "Trusted healthcare professionals" ranked highest among factors that would motivate consumers to take a more active role in managing their health, cited by 55% of respondents. Consumers also ranked convenient access to these professionals (virtually or in person) as a motivating factor (34%) (Fig. 12).

11%

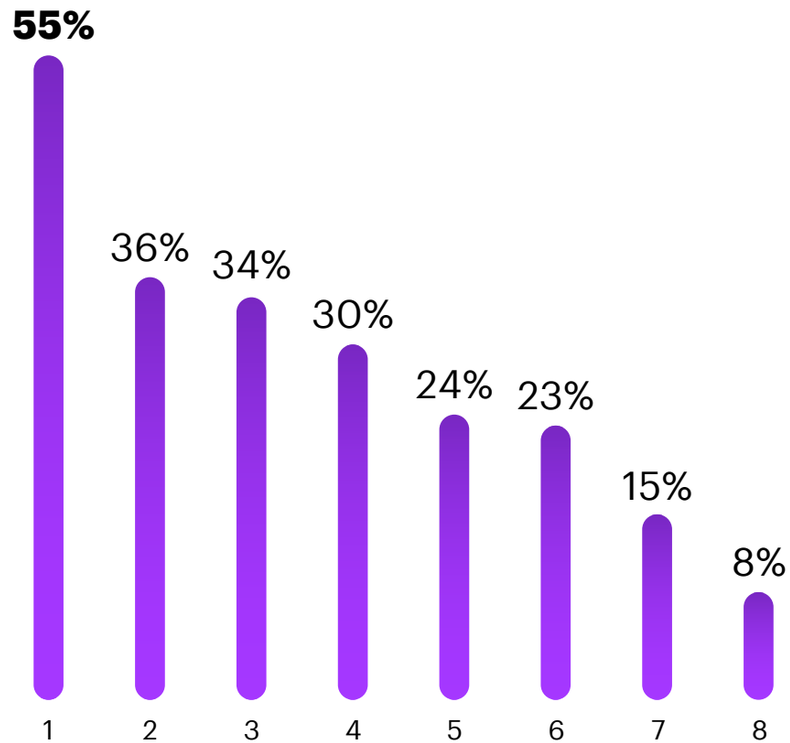
of consumers said that their regular healthcare provider recommended digital tools to manage health

55%

of consumers said "trusted healthcare professionals" would motivate them to take a more active role in managing their health

Can retailers compete?
As of July 17, 2020, CVS Health currently operates more than 1,400 COVID-19 rapid test sites in 33 US states and Washington, D.C., but is currently facing a backlog of 6-10 days for results.[16] Walgreens, on the other hand, plans to open drive-through COVID-19 testing locations in 49 US states and Puerto Rico, the drugstore chain said.[17] The company currently has testing sites in 31 states.[18]

Figure 12: Trusted care providers motivate consumers to manage their health



1 Trusted healthcare professionals who work closely with me to manage my wellness
2 Financial support or incentives to stay healthy
3 Convenient access to healthcare professionals, either virtually or in person
4 Personalized information about what I should do to stay healthy
5 More time and energy to make healthy choices
6 Reliable, secure digital tools that help me understand and manage my health habits
7 If my healthcare professional told me to
8 Nothing would motivate me to take a more active role

Q: Which the following would most motivate you to take a more active role in managing your health?

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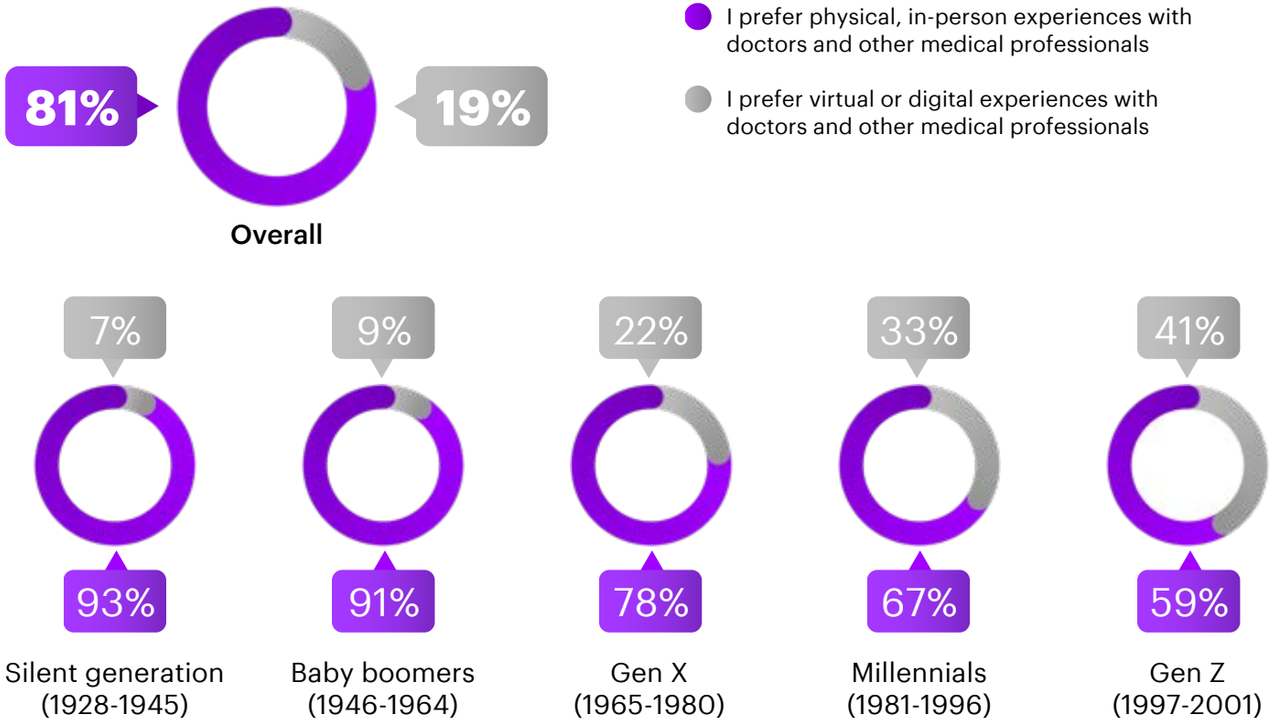
Younger healthcare consumers are open to virtual over in-person care

Overall, most consumers (81%) prefer physical, in-person experiences with care providers over digital experiences, but these numbers drop among younger generations. Among Gen Z, 41% would prefer a virtual or digital experience with a doctor or other medical professional, along with 33% of millennials.

Figure 13: Younger consumers are more open to virtual care over in-person



Q: Choose the statement that best describes how you feel
Silent generation n=255; Baby boomers n=860; Gen X n=475; Millennials n=597; Gen Z n=115

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Consumers are willing to receive virtual care from a variety of sources

While a majority of healthcare consumers are open to receiving virtual healthcare services from their traditional providers (54%), they are also willing to receive virtual care from technology or social media companies such as Google and Microsoft (27%); retail brands such as Best Buy, Walmart and Amazon (25%); and medical startups (21%).

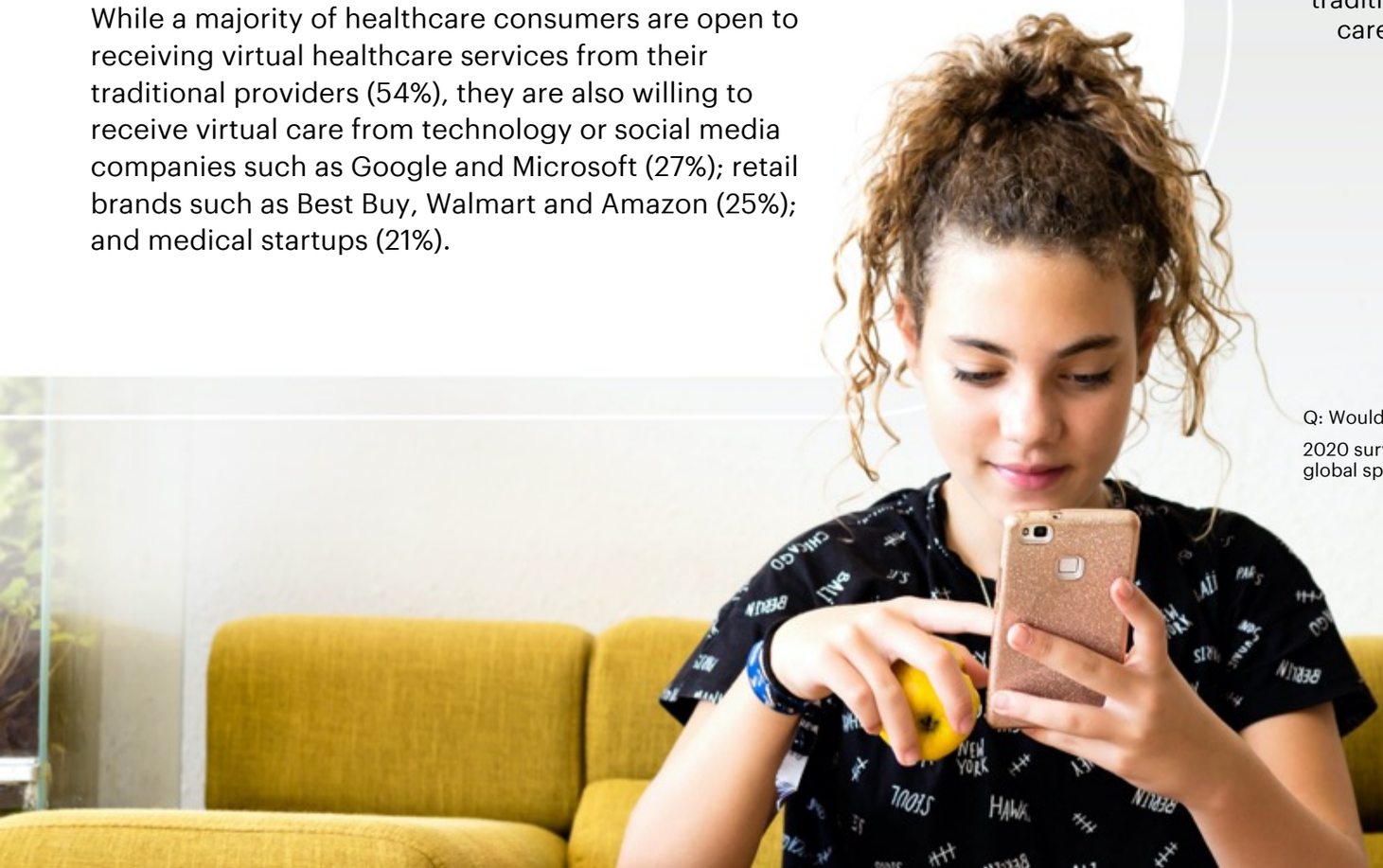
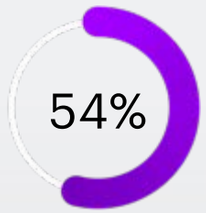


Figure 14: Consumers are much more willing to receive virtual services from traditional providers



Virtual care from traditional medical care providers

Virtual care from technology or social media companies

Virtual care from retail brands

Virtual care from medical startups

I am not willing to try virtual healthcare

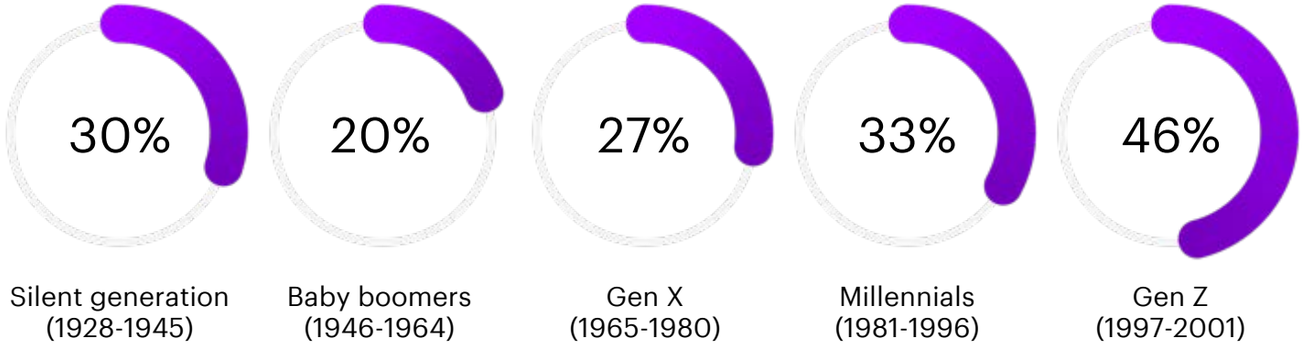
Q: Would you be willing to receive any of the following kinds of virtual healthcare?

2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

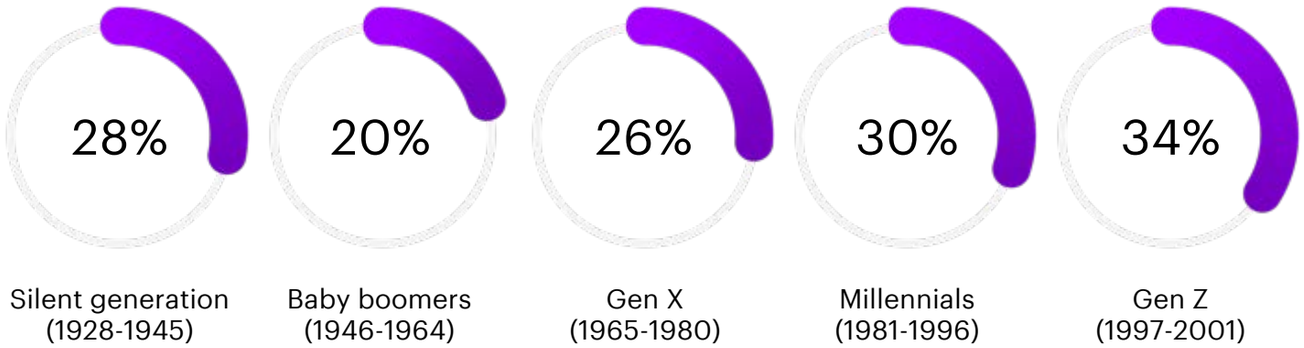
Openness to receiving virtual care from non-traditional entities varies among age groups

Younger generations are more open than older generations to receiving virtual care from entities outside of their traditional provider relationship. For instance, Gen Z respondents are more willing to receive virtual healthcare from technology or social media companies (46% Gen Z compared to 20% of baby boomers) and from retail brands (34% Gen Z compared to 20% baby boomers).

Figure 15: Willingness to try virtual care from tech companies...



...and from retail brands



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2020 survey data is from November to December of 2019 and reflects consumer attitudes prior to the global spread of COVID-19.

Engaging consumers in evolving methods of healthcare delivery, digital and physical

RECOMMENDATIONS FOR HEALTHCARE ORGANIZATIONS

1 **Make doctors key to promoting digital engagement and awareness.** Medical providers should use doctors' authority and their position of trust to promote awareness of and engagement with digital health among consumers, as they have done in response to COVID-19. Consumer trust in traditional providers should give clinicians considerable leverage as they seek to build on recent gains in virtual healthcare.

2 **Earn trust by being transparent and accountable.** Non-traditional providers, such as technology companies and retail/consumer brands, need to establish trust to earn a place on the new care team. They can do so by being transparent, asking for consent to use consumer data and by demonstrating proper use of consumer data. They can build on the greater confidence younger consumers have in their services and expand from there. New and established healthcare organizations can seize this moment and earn trust by resetting promises to constituents.

3 **Marry digital/virtual care with physical care** to provide effective, trusted, reliable services physically and at-a-distance. The new healthcare system will rely on seamless, coordinated care that provides people with the right attention, services, therapies and products anytime, anywhere, to instill confidence, safety and respect across all moments.

Typing...

Sources

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Lifelong Chicagoan Kaveh Safavi, M.D., J.D. has been a healthcare leader for more than 30 years. Kaveh's accomplishments include establishing one of the Midwest's first electronic health record-enabled primary care practices. He also earned the distinction of both medical and law degrees, an M.D. from Loyola University School of Medicine and a J.D. from DePaul University College of Law. Kaveh is board-certified in internal medicine and pediatrics. Kaveh was recently named the top Healthcare IT Executive of 2020 by the IT Services Report.

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Accenture 2020 Consumer Research on Digital Health

Accenture commissioned a seven-country survey of 7,804 consumers aged 18+ to assess their attitudes toward technology adoption, wellness management and their changing relationship with providers. It is the latest in a series of annual health technology surveys tracking the perspectives of consumers, with a particular focus this year on the shifting needs and desires of consumers and how they align with the trends that are redefining services provided by healthcare systems. The online survey included consumers across seven countries: Australia (1,000), England (1,002), Finland (800), Norway (800), Singapore (900), Spain (1,000) and the United States (2,302).

The survey was conducted by Oxford Economics on behalf of Accenture between November and December 2019. Where relevant, the survey uses select findings from the **Accenture 2019 Digital Health Consumer Survey**, the **Accenture 2018 Consumer Survey on Digital Health**, the **Accenture 2017 Consumer Survey on Healthcare Cybersecurity and Digital Trust** and the **Accenture 2016 Patient Engagement Survey**.

For providing insights into consumers behavior changes during COVID-19 crises, Oxford Economics conducted desk research in April and May 2020, leveraging public media and official government sources. Insights were compared against the initial survey findings to understand temporary forced versus long term voluntary digital health adoption chances, drivers and barriers.

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