Digital adoption in healthcare: Reaction or revolution?

2021 Accenture Health and Life Sciences Experience Survey–US findings

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The 2021 Accenture Health and Life Sciences Experience Survey of nearly 1,800 people in the United States reveals how the healthcare experience is changing.

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Has healthcare really made the lasting improvements we expected to see in light of the global pandemic?

The healthcare system showed resilience over this past year and was accessible to many. In fact, 26% of those we surveyed said their access to healthcare has been even better since the onset of the COVID-19 pandemic.

Digital adoption spiked overnight as the entire healthcare industry had to quickly pivot to virtual care. However, we learned that more than one quarter of survey respondents did not use any digital technologies to manage their health in the past year.

Growth in digital health technologies adoption had stalled before COVID-19. With some notable exceptions, this year's data doesn't show that the plateauing trend is over. Rather than going about business as usual, healthcare organizations and pharmaceutical companies, and the healthcare ecosystem as a whole, must combine the power of technology and human ingenuity to improve digital adoption, experiences and trust in this new era.

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Key findings at a glance

Our survey comprised four themes that explored key aspects of the experiences people are having with healthcare today:

TECHNOLOGY

Our research showed an uptick in use of select digital technologies to engage with providers.

Virtual consultations and electronic health records (EHR) were the top digital technologies used this year. They surged in tandem as one technology (virtual consultations) lifted the use of the other (EHR). Other digital and mobility-related health technologies did not show much movement or declined in the past year (wearables and mobile/tablet solutions for healthcare). People would be more likely to adopt these technologies if they felt that they were secure and private and if healthcare providers did more to increase awareness of the value of these tools.

EXPERIENCE

Currently, not every healthcare experience is good, and the negative ones have a variety of consequences—from additional stress to switching providers to forsaking treatment.

People look for positive experience factors such as clear explanations from their provider, and they want the emotional support that they feel when a provider listens and shows empathy—emotional support proved to be just as important as medical support to those surveyed. The US healthcare system has an immense opportunity to provide a better customer experience by using technology to be more efficient or to deliver useful information such as transparency into pricing.

ACCESS

Healthcare system access showed resilience over this past year. In fact, one out of four people we surveyed said their access to healthcare has been better since the onset of the COVID-19 pandemic.

This rose to nearly one out of three people with a health condition. However, not everyone is getting the healthcare services they need. Twenty percent say their access is slightly or much worse. Often people don't know where to turn for financial assistance.

TRUST

The increase in virtual care due to the pandemic has made people more aware of the value of their health data, consent and security.

People are more willing to share their personal health data if there are rewards, such as improving their health or gathering evidence about medication or treatment efficacy. People trust their healthcare providers to handle their digital health information well, but they are much less trusting when it comes to technology companies, insurance providers, pharmaceutical companies and the government. Building transparency and making advances in people´s data ownership rights will earn trust for data sharing and lead to effective care.

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TECHNOLOGY

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Did interest in digital technology come, then go?

Adoption of digital technologies increased only in a few areas

It comes as no surprise that use of virtual health technologies for managing people's health saw an increase this year. In 2020, before the pandemic, only 7% of people had a virtual consultation with a provider compared with a robust 32% this year (see Fig 1 on next page). Nearly half (48%) say they have never had a virtual healthcare appointment. Thirty-nine percent of patients* with chronic diseases or current conditions had a virtual consultation in 2021. We also saw an increase in use of electronic health records—with 31% using EHRs this year (38% for our patient cohort). Remote patient monitoring tripled compared to our last pre-pandemic survey. Interestingly, 21% of those surveyed said they would be willing to pay for services or digital technologies.

However, digital adoption lagged in several areas. The use of mobile phone/tablet applications decreased significantly compared to previous years and use of wearables stayed about the same. Far fewer people are using social media and online support communities, which is surprising given the isolation many faced during the pandemic.

In sum, it is a mixed picture and people don't seem to embrace the digital options for healthcare services as much as they do in other industries, for instance banking.

*Our "patient" cohort within the broader sample includes those with at least one of six therapeutic area conditions: Oncology, Cardiovascular, Respiratory, Immunology, Gastroenterology and Neurology (n=887 patients)

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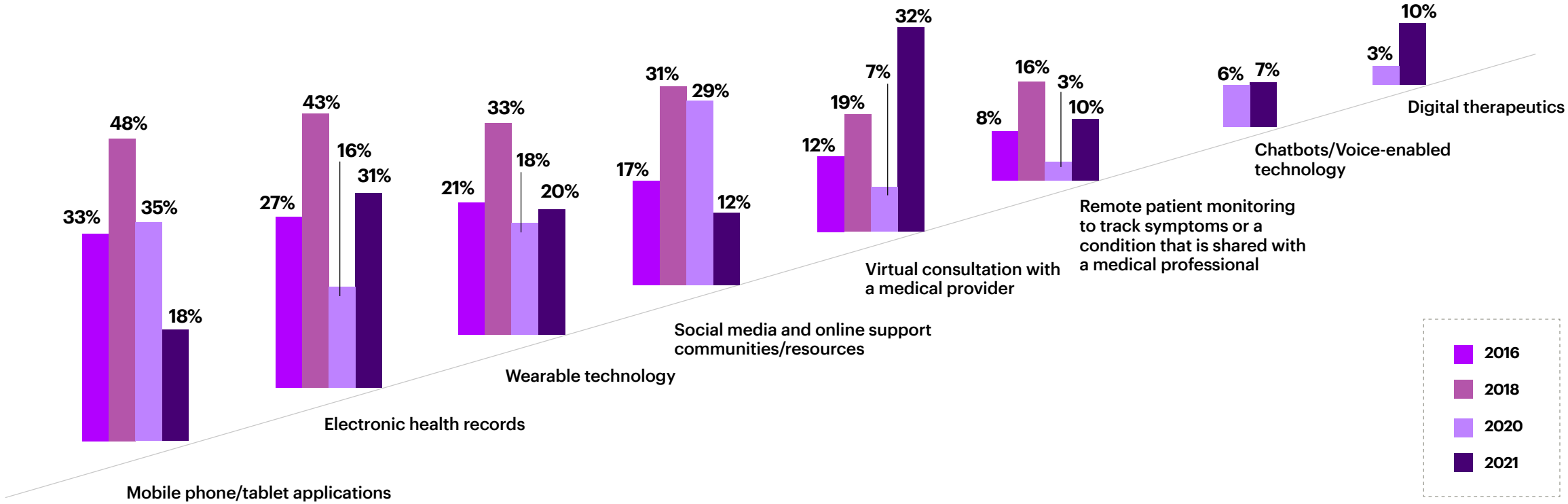
Figure 1: Digital health technology adoption varies

Q: Which, if any, of the following digital technologies have you used to manage your health in the past year? (by years)



Source: 2021 Accenture Health and Life Sciences Experience Survey
US respondents : 2021 n = 1,755 2020 n = 2,302 2018 n = 1,562 2016 n = 1,434
Chatbots/Voice-enabled technology and digital therapeutics were answer options in 2021 and 2020 surveys, no data available for 2016-2018

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As we learned in previous years, one reason why many did not adopt digital health technologies more broadly is the lack of trust in technology companies to safeguard their personal health information. This year, nearly half (43%) said they would not be willing to have a virtual care appointment with technology companies in the future. People would be more likely to adopt digital technologies if a provider recommended them (33%), if they felt more confident in data security and privacy (30%) and if these technologies enabled them to receive better information about their health (30%) (see Fig 2).

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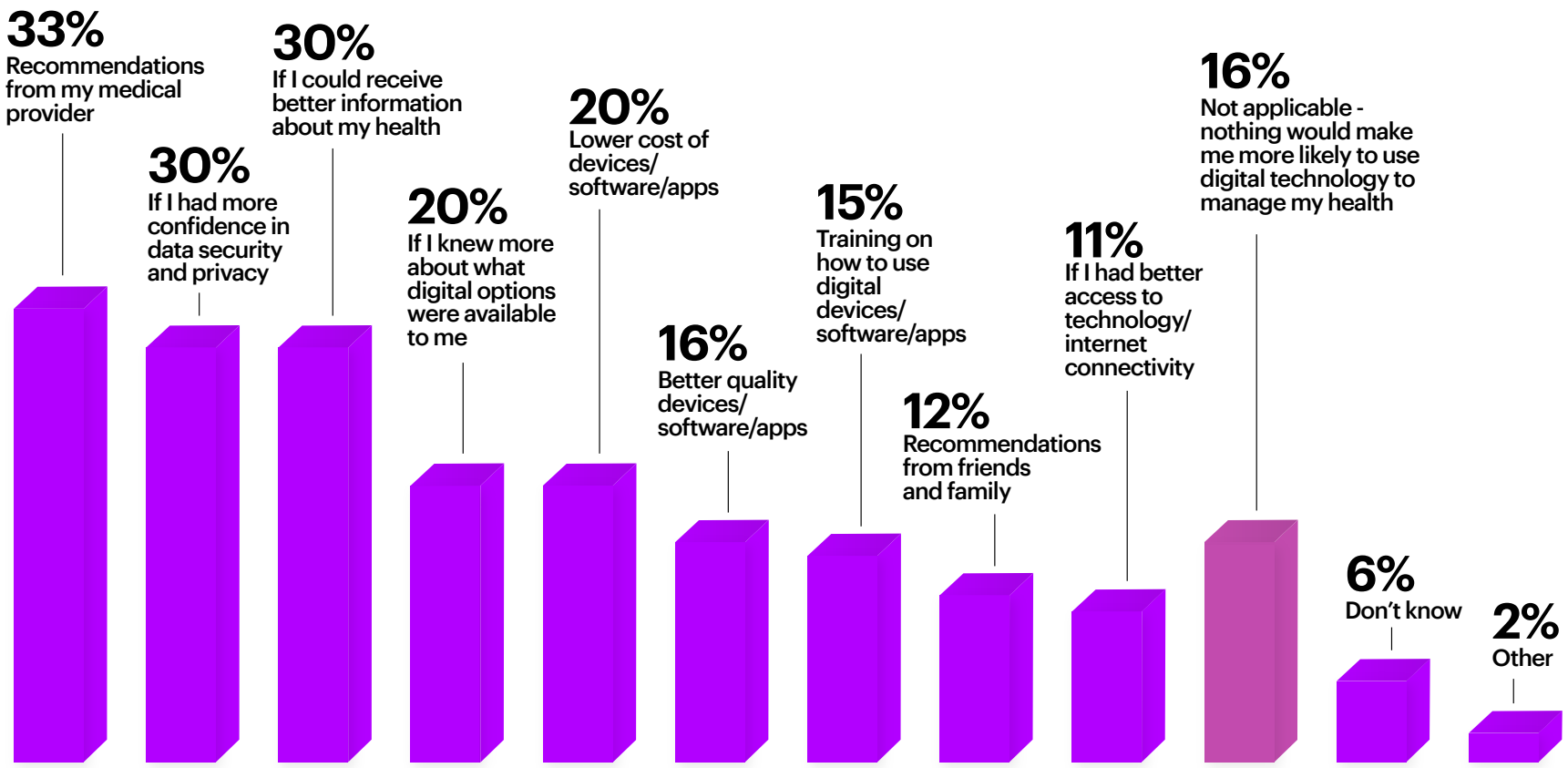
Figure 2: Opportunities for improved digital health technology adoption

Q: Which three, if any, of the following would make you more likely to use digital technology to manage your health?



Source: 2021 Accenture Health and Life Sciences Experience Survey
n = 1,755

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EXPERIENCE

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Elevating experiences to improve outcomes

Negative healthcare experiences can have lasting consequences

Better experiences can improve engagement with the healthcare system. Our survey revealed that only one out of three people said they did not have a negative experience with a medical provider, pharmacy or hospital. So what does that mean for the remaining two-thirds? People have had a variety of negative healthcare experiences such as, their visit was not efficient (22%) or the medical advice was not helpful (19%) (see Fig 3 on next page).

Nearly half (44%) of the people reporting negative experiences felt stressed or upset by these experiences, and there were additional consequences (see Fig 4 on page 12): Slightly more than one-third (34%) switched providers or treatments or were less likely to seek medical care the next time they needed it. Others chose to not keep up with their treatment or they never picked up their prescription because of these poor experiences. Only 12% of people said that the negative experience didn´t affect them in any way, implying that 88% of people affected respond to an unsatisfactory healthcare experience in a way that limits healthcare effectiveness.

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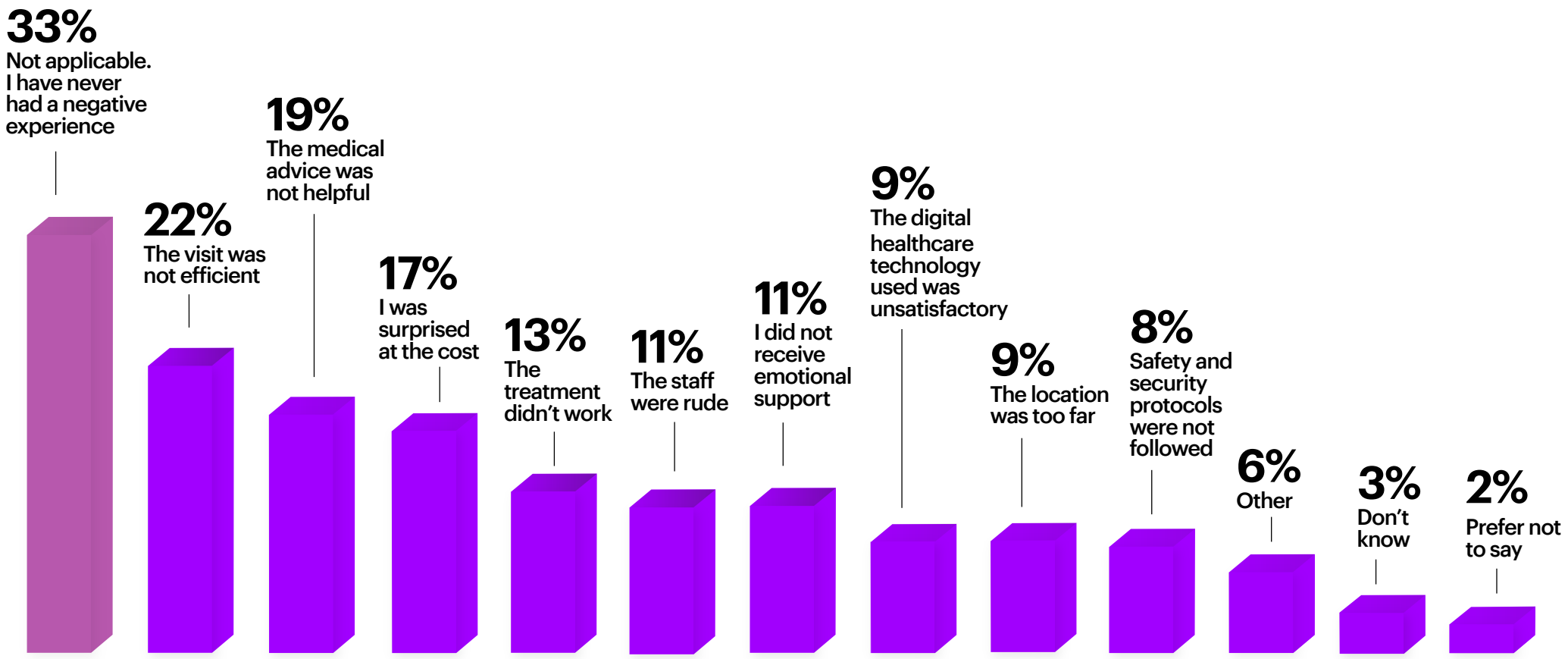
Figure 3. What causes a negative healthcare experience?

Q: Thinking about the last time you personally had a negative experience with a medical provider, pharmacy or hospital. Which, if any, of the following describe what made that experience negative?



Source: 2021 Accenture Health and Life Sciences Experience Survey
n = 1,755

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Figure 4. Consequences of a negative healthcare experience

Q: In which, if any, of the following ways did that negative healthcare experience affect you?

Negative healthcare experience affected consumers/patients such that half of them were stressed/upset, more than 1/3 switched providers and more than 1/3 were less likely to seek medical care next time they needed it

Source: 2021 Accenture Health and Life Sciences Experience Survey
People who have had a negative healthcare experience. n = 1,089

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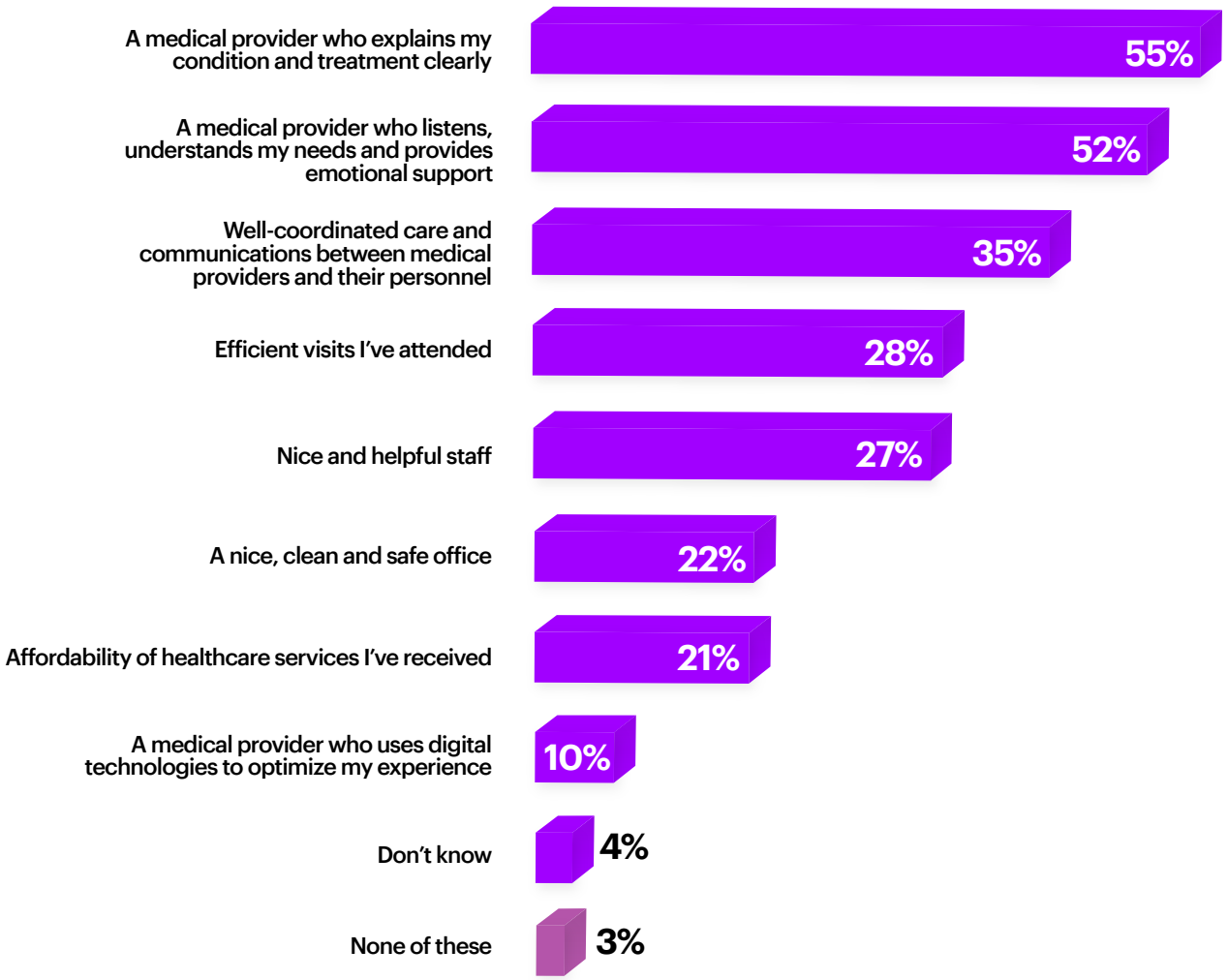
People want to receive emotional support just as much as they want to receive medical support

When asked which factors were most important to creating a positive experience with a healthcare provider, people ranked as the top two "a medical provider who explains the patient's condition and treatment clearly" (55%) as the most important factor with "a provider who listens, understands patient's needs and provides emotional support" (52%) as a close second (see Fig 5). The third highest rated aspect of a positive experience is well-coordinated communications and organization; 35% of people said it matters to them. Having a medical provider that shows empathy is significantly more important than a nice, clean office, and almost twice as important as nice and helpful staff.

Figure 5. Empathy is as important as the medical treatment

Q: Which three, if any, of the following factors are most important for your positive experience with a medical provider?



Source: 2021 Accenture Health and Life Sciences Experience Survey n = 1,755

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ACCESS

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Overcoming barriers to access

Healthcare system access showed resilience over this past year

More than half of people we surveyed (51%) said there has been no change in their access to healthcare since the onset of the COVID-19 pandemic—and 26% said their access has improved (see Fig 6 on next page). However, 20% say their access is slightly or much worse. Forty percent of all the people we surveyed in the US said they have not had an affordability issuue with medical care or medications througout their healthcare experience (including pre-COVID 19). This figure drops to 30% for Gen X and 27% for Millennials implying that these age groups experienced, at some point in their lifetimes, more financial hardship than Baby Boomers.

Affordability barriers have a potential effect on health outcomes. When people cannot afford the medical care or medications they need, they often delay (39%) or decline (29%) treatment or medication or skip an appointment with a medical provider (30%). When it comes to medications, they may decide to ration their prescription (24%) or treat their condition with an over-the-counter medication (43%).

The reaction to the affordability barrier varies across age groups. Millennials are more likely than other generations to take advantage of financial assistance, such as rebates and non-profit services, and they are more likely to use digital therapeutics and digital technologies when they cannot afford healthcare, whereas Gen Xers and Baby Boomers are more likely to explore alternatives that impact their treatment. Overall, only 14% of people who faced affordability problems ever used digital technologies for their healthcare. This suggests the cost-efficiency potential of many of these tools is untapped by the system (see Fig 7 on page 17).

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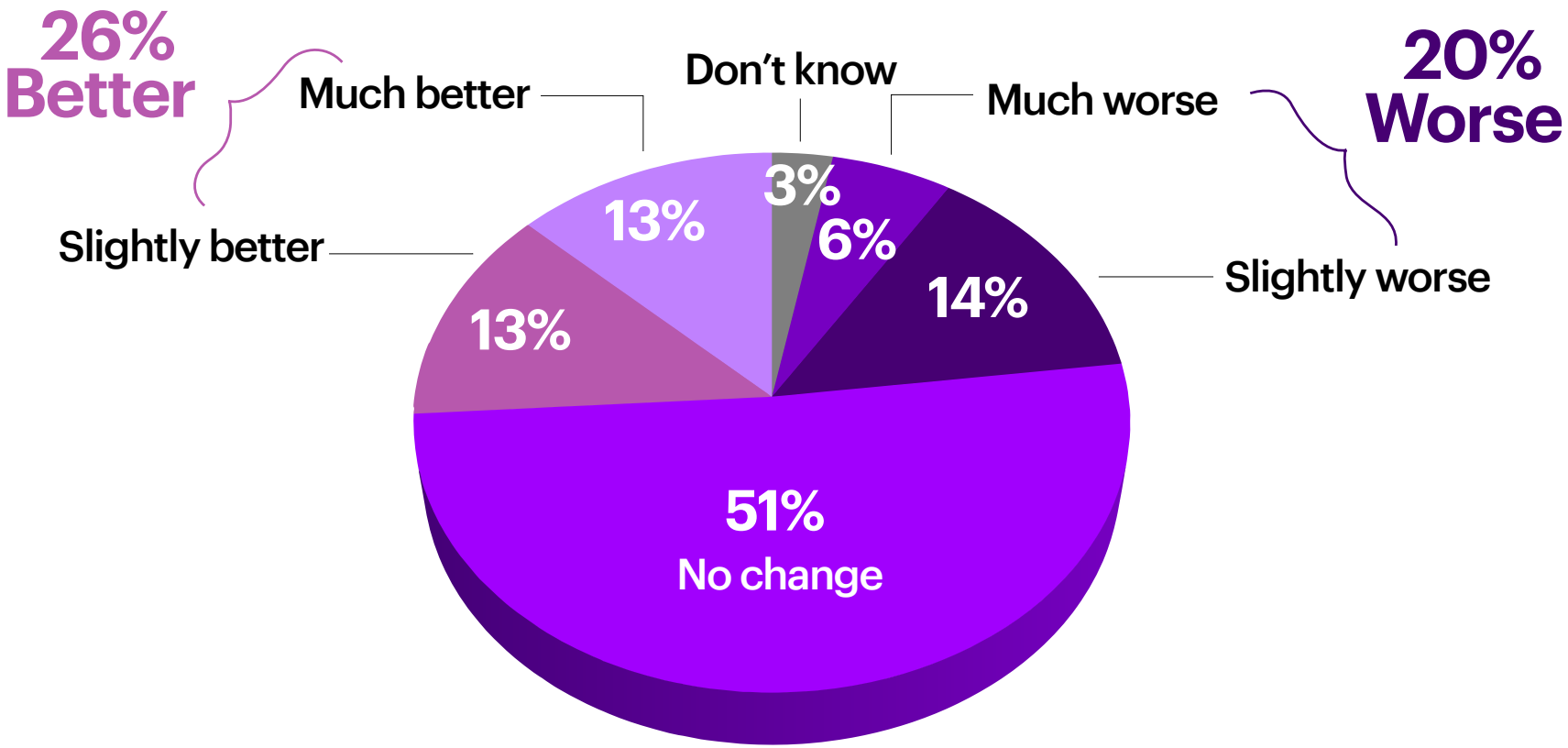
Figure 6. For most people, healthcare access was unchanged or even improved during the pandemic

Q: Overall, has your access to healthcare been better or worse since the onset of the COVID-19 pandemic, or has there been no change?



Source: 2021 Accenture Health and Life Sciences Experience Survey
n = 1,755

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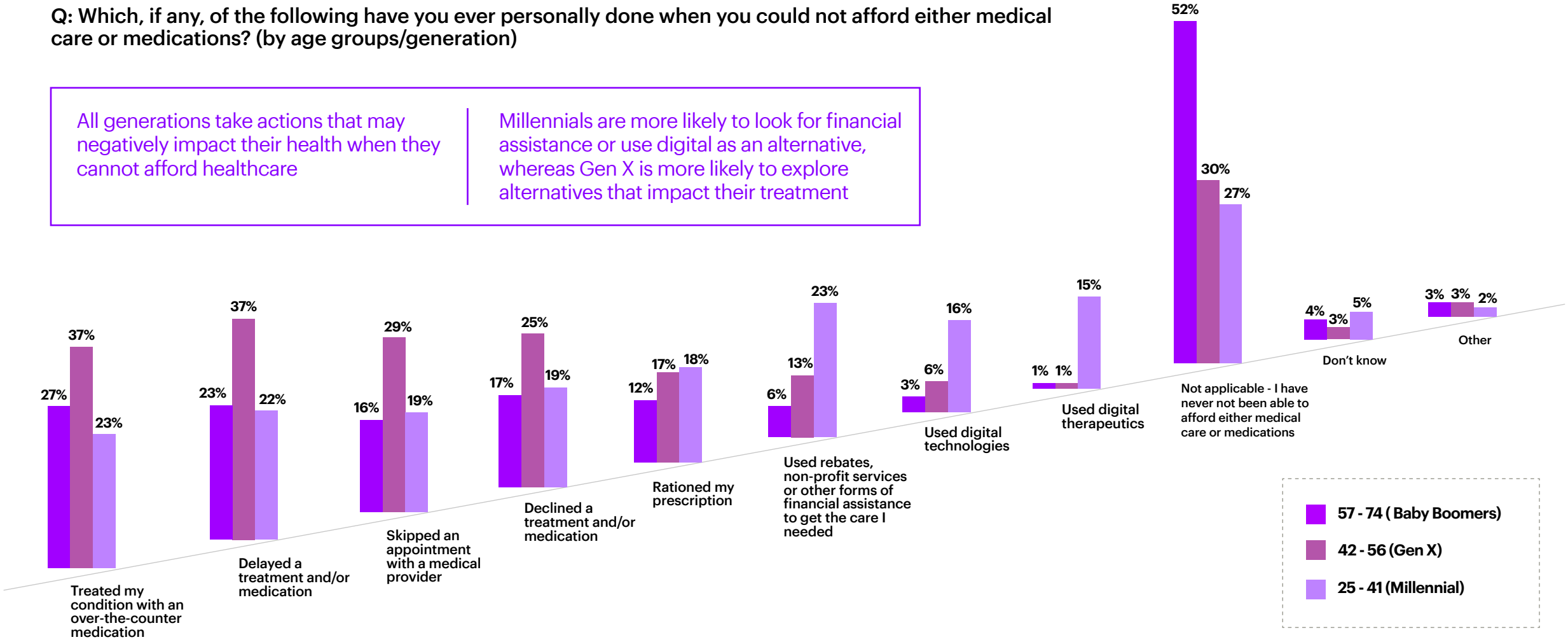
Figure 7. Responses to affordability issues vary across age groups

Q: Which, if any, of the following have you ever personally done when you could not afford either medical care or medications? (by age groups/generation)

All generations take actions that may negatively impact their health when they cannot afford healthcare

Millennials are more likely to look for financial assistance or use digital as an alternative, whereas Gen X is more likely to explore alternatives that impact their treatment



Source: 2021 Accenture Health and Life Sciences Experience Survey
25 - 41 (Millennial) n = 627; 42 - 56 (Gen X) n = 260; 57 - 74 (Baby Boomers) n = 602
Gen Z and 75+ excluded for simplicity.

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TRUST

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Trust across the health ecosystem varies, hindering effective care

People are more aware of the risks and benefits of sharing data

Amid the rise of virtual care, a striking majority of people are considering whether they have the right to approve the collection and usage of their personal health information beyond their treatment (73%). Greater use of virtual care has made them also more aware of their data privacy and security needs (64%) and they are thinking about whether their health information is valuable to advancing research (54%) (see Fig 8 on next page).

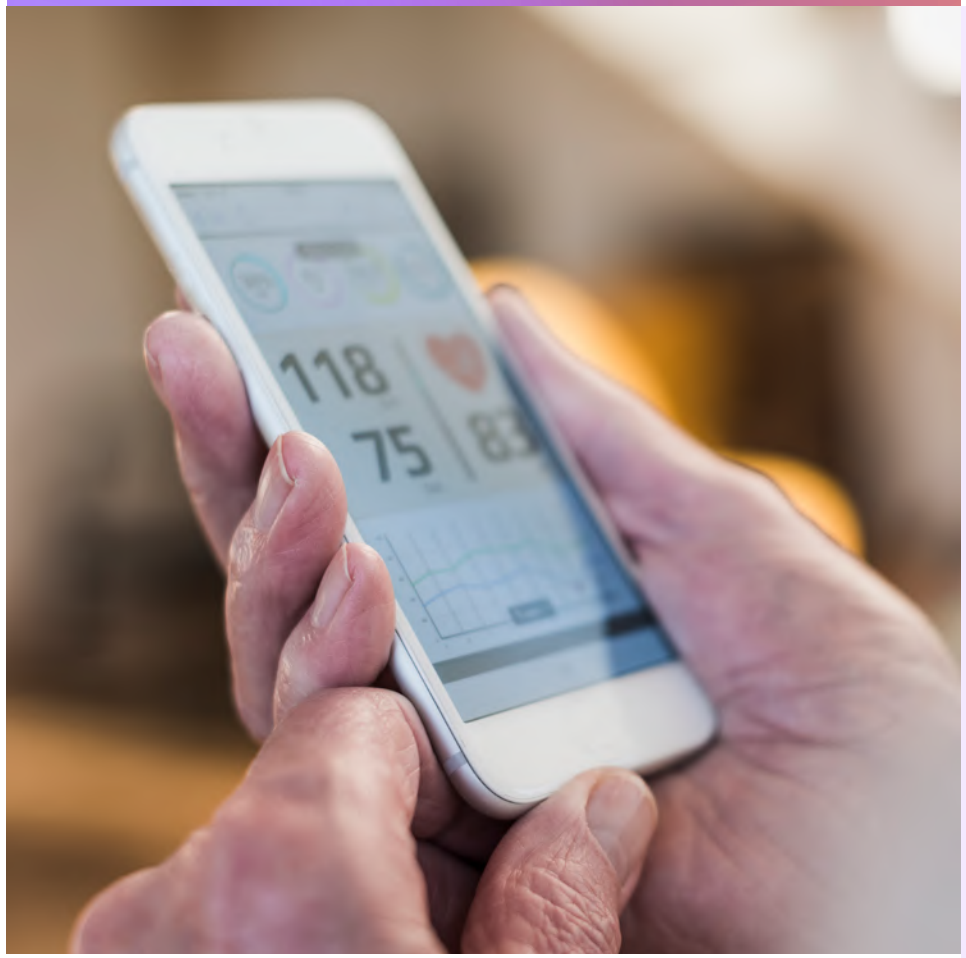

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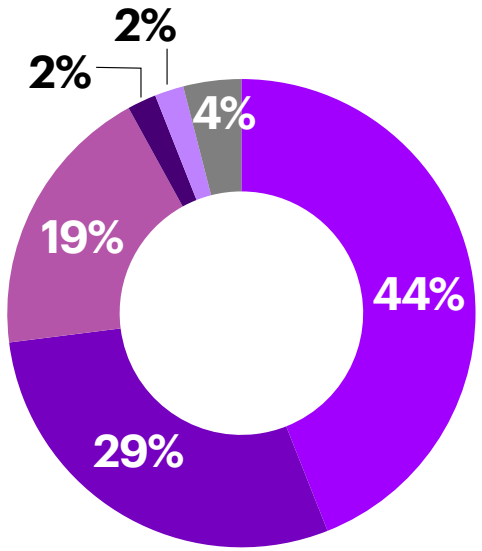
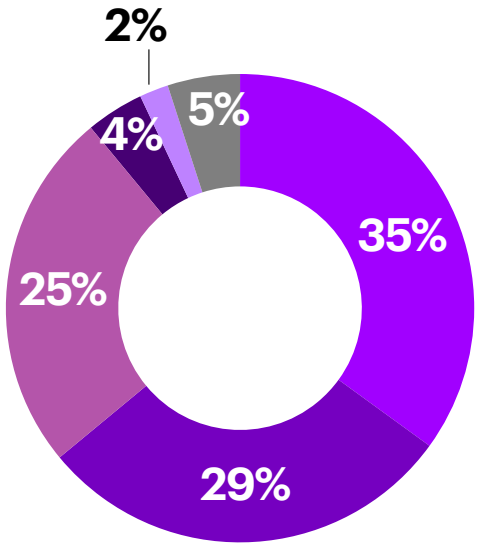
Figure 8. People become more aware of the value of their personal health information

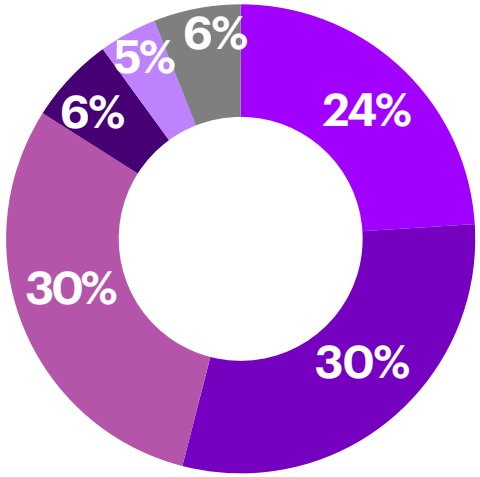
Q: To what extent do you agree or disagree with the following statements?
The increase in virtual care due to the COVID-19 pandemic has made me consider...



...that I should have the right to approve the collection and usage of my personal health information (PHI) for any purposes beyond my treatment



...my data privacy and security needs



...that my personal health information is valuable to the healthcare system to advance research (i.e., improving drugs and treatments)

Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree | Don't know

Source: 2021 Accenture Health and Life Sciences Experience Survey
n = 1,755

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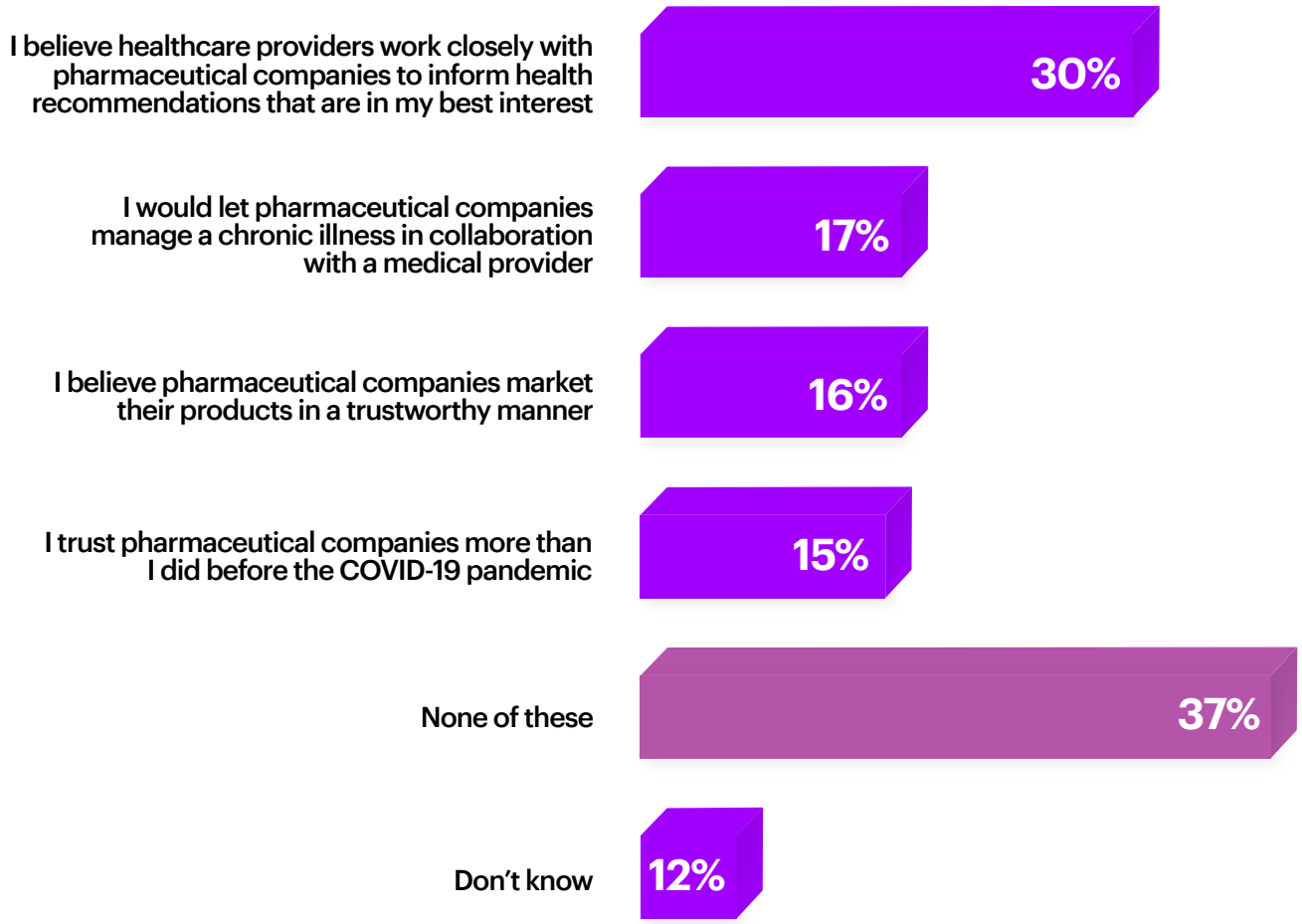
People have a greater willingness to share their personal health data with their medical provider or pharmaceutical companies if it delivers a personal benefit, such as improving their health and increasing their medications' effectiveness (44%), or to gather evidence about their medication and treatment efficacy (37%). While 15% of respondents say they trust pharmaceutical companies more now than they did before the COVID-19 pandemic, trust in these companies remains low—despite their contributions to solve the pandemic. For example, only 17% would let pharma companies manage a chronic illness in collaboration with a medical provider (Fig 9). Imagine the advancement of medical science and health outcomes based on a close collaboration between people, healthcare providers and payers, insurance companies, medical technology companies and the pharma sector if the trust level could be elevated.

Figure 9. People's views on collaboration and trust in pharmaceutical companies

Q: Which, if any, of the following statements apply to you?



Source: 2021 Accenture Health and Life Sciences Experience Survey
n = 1,755

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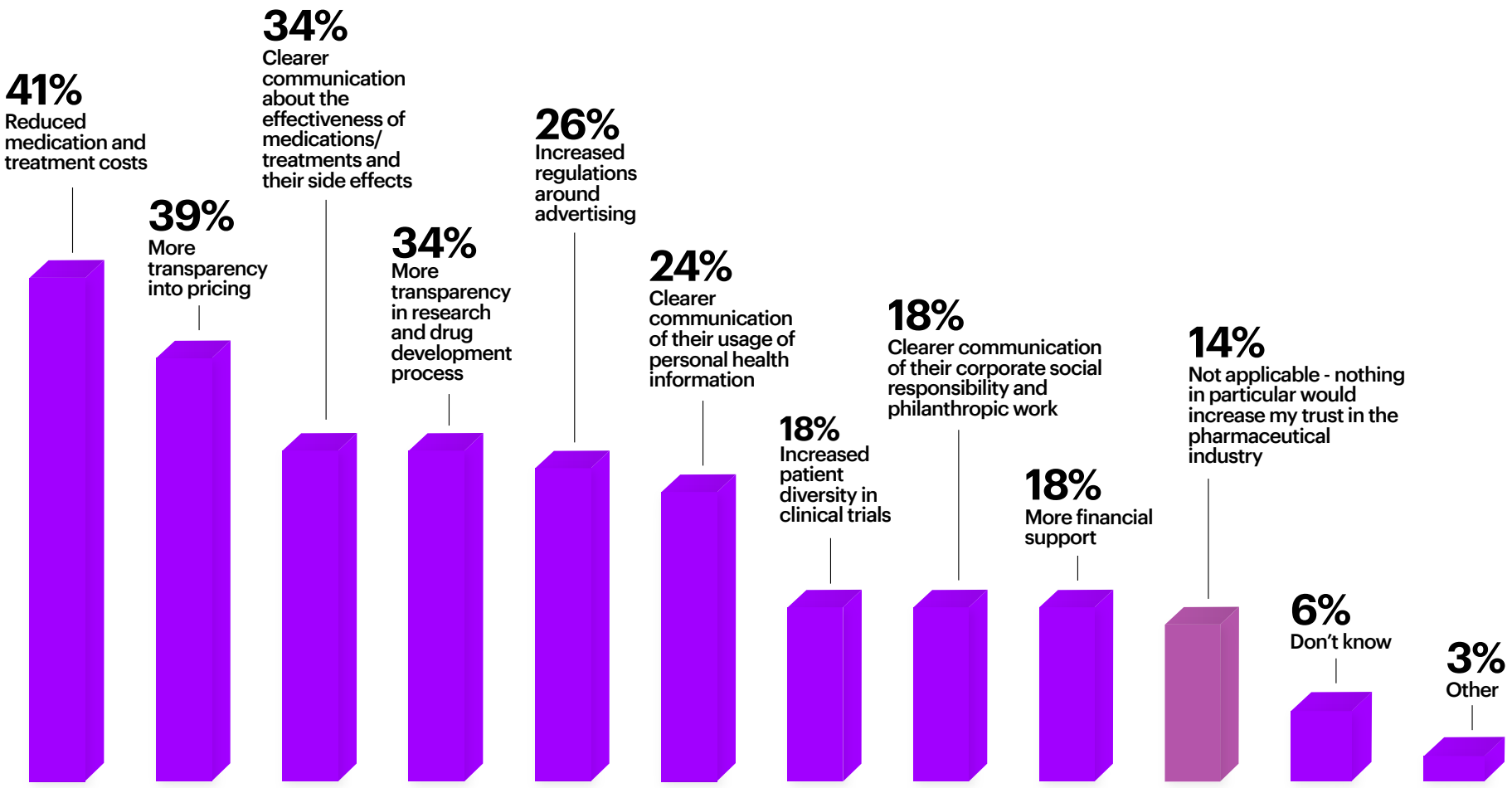
Pharmaceutical companies can increase trust when they make treatments more affordable and more transparent

As in years past, people trust their healthcare providers far more than health insurance companies, technology companies or the government. People think reducing medication and treatment costs, and increasing pricing transparency, would increase trust in pharma companies. This is not surprising, as almost 30% of patients report not taking their treatments as prescribed due to cost. We believe pharma companies could address these issues by redefining economic relationships with customers, demonstrating value and sharing in outcome-based risk (source: Accenture´s New Science publication).

In addition, people would have more trust in pharma companies if they were more transparent about the drug development process (34%) and communicated clearly about the effectiveness and side effects of medications (34%) (Fig 10). Some people would also like to see tougher regulations around advertising and more patient diversity in clinical trials.

Figure 10. Trust building measures for pharmaceutical companies

Q: Which, if any, of the following would increase your trust in the pharmaceutical industry?



Source: 2021 Accenture Health and Life Sciences Experience Survey
n = 1,755

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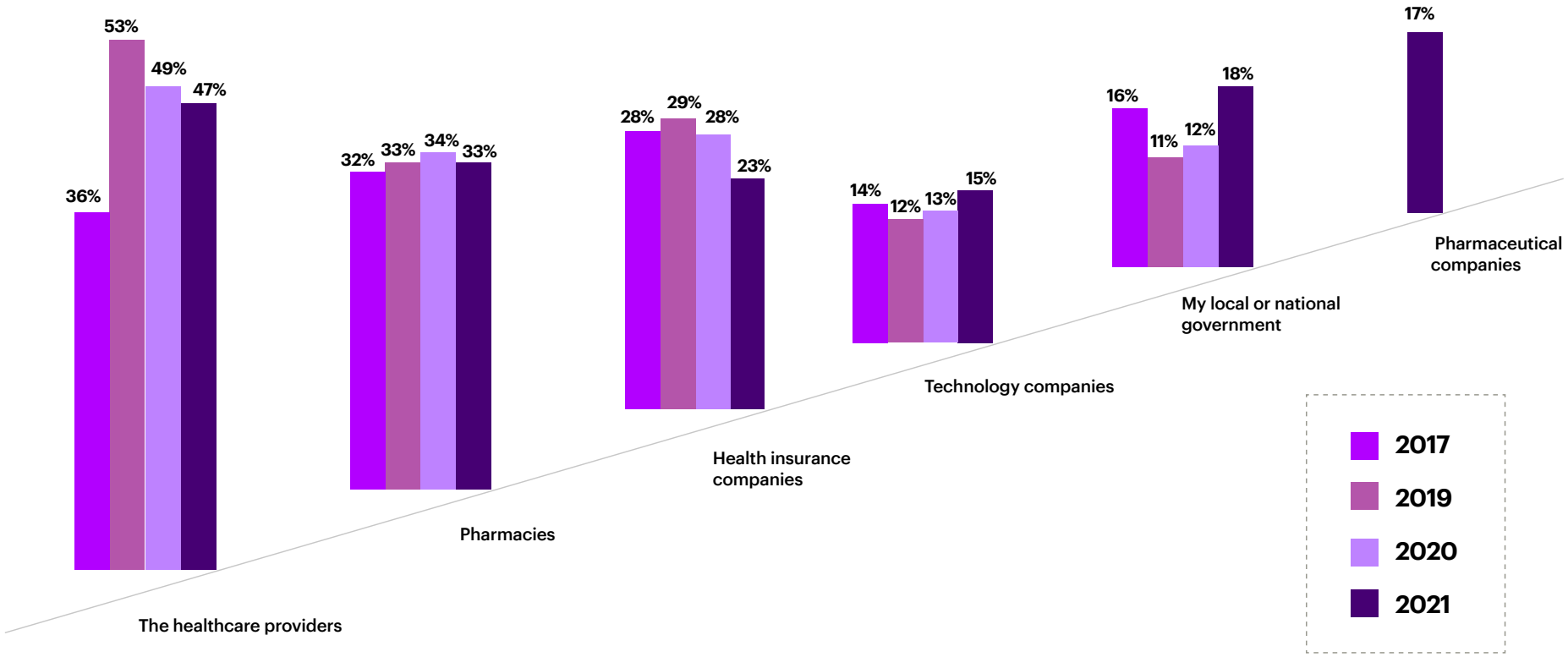
Over the years, we've tracked people's trust level in the healthcare ecosystem and found it was deteriorating for some healthcare players. (Fig 11). People doubted the technology and health insurance companies, as well as their local or national government's ability to safeguard their personal healthcare information.

Figure 11. Healthcare ecosystem players have work to do to build trust

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 personal information secure? ("Very much" responses)



Source: 2021 Accenture Health and Life Sciences Experience Survey
2021 n = 1,755 2020 n = 2,302 2019 n = 2,338 2017 n = 2,000
Pharmaceutical companies added to answer options in 2021 survey no data available for 2017-2020

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Moving from reaction to revolution

The healthcare system used technology to accomplish great feats for patients during the COVID-19 pandemic, yet will these gains last? People´s sentiments and behaviors provide no clear answer.

While many advances were in reaction to challenges brought forth by the pandemic, there is room to build on these gains to work in revolutionary ways that put people at the center of care. The signals we saw in our research revealed the need to embrace digital technologies that support health management and healthcare access, deliver better, emphatic experiences and facilitate greater trust.

Technology can help solve many issues, but the benefits of using digital to access and manage one's care are not always rated important by people or considered among the first options for care. Members of the healthcare ecosystem must present information about benefits more clearly to boost adoption and demonstrate to people how technology can support a more human healthcare experience. Ideally, digital technologies would support a cohesive experience, from virtual channels used at home or on the move to the doctor's office and back, and they can help providers to spend more time caring for patients.

Another critical element is the coming together of all players in the ecosystem to make healthcare experiences simpler, more coordinated, more empathetic and, ultimately, more effective for people. The task of humanizing healthcare does not solely fall on the shoulders of providers. All players—from pharma companies to tech companies to insurance providers—should work in unison to improve care experiences as negative interactions often prevent people from accessing the care they need.

Lastly, trust remains an issue. People largely trust their providers, but they are less trusting of others in the healthcare ecosystem. Being more transparent when it comes to pricing, drug development processes and side effects of medications, as well as garnering people´s consent in the use of their personal health information, can help bolster trust.

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We have entered a new era of care during the pandemic, but the US healthcare system seems at risk of forsaking the strides that have been made if they don´t listen to people´s needs. This moment in time presents a historic opportunity to shape the future of healthcare.

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About the 2021 Accenture Health and Life Sciences Experience Survey

Accenture commissioned a survey of 11,823 people aged 18+ to assess their attitudes toward the healthcare system in terms of access, equity, service experience, digital technology adoption and trust. The online survey included people across 14 countries: Australia (649), England (1,200), Finland (662), Germany (872), France (822), Italy, (718), Ireland (657), China, (806), India (873), Norway (648), Singapore (653), Spain (675) and the United States (1,755). Forty percent of the sample represent patients with current conditions in the following therapeutic areas: Oncology, Cardiovascular, Respiratory, Immunology, Gastroenterology and Neurology. The survey was fielded and analyzed during May and July 2021. Thanks to **Oxford Economics** for its assistance in developing the survey, analyzing the data and establishing key narratives. Thanks to **YouGov** for carrying out the fieldwork.

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