ENGAGING WITH DIGITAL HEALTHCARE CONSUMERS

Patients Ready To Share Data But Healthcare Organizations Yet To Tap Opportunity

Digital health data is growing. Hospitals, medical offices, and consumers are adopting Electronic Health Records across the United States. Plus, healthcare organizations continue to institute reforms mandated by the Affordable Care Act. Although healthcare organizations are slowly embracing the use of electronic healthcare data, how do patients feel about it? Are patients willing to share private information? What can healthcare organizations do to make people feel more comfortable about having their personal information shared and stored electronically? How can healthcare organizations tap the potential of analytics and big data to provide patient-centric care and improve wellness while bending the cost curve?

Infosys' *Engaging with Digital Consumers* is the first major global study to shed significant light on the disconnect between digitally aware consumers and the businesses that serve them. In healthcare, the survey revealed unease consumers have with sharing private information with their health care providers. The company tested a number of different value propositions as they relate to the use of data in healthcare, along with consumer comfort with the frequency of information sharing. Below are detailed findings and key takeaways for the U.S. portion of the survey:

- **It's right there in my file, just turn it on:** 92 percent of consumers favor physicians being armed with electronic information about patients.

- **It's safe:** 80 percent are confident their doctor's office has the right security in place to protect their personal medical information, but interestingly…

- **I'm not telling you that:** Less than 60 percent are willing to share personal medical history, family medical history, and diet or physical activity to receive a personalized experience.

- **I'm online, are you?:** Although 98 percent are comfortable sharing personal information with their doctor's office in person, more than two-thirds will do so online (77 percent) or on mobile devices (66 percent). One in four consumers is not able to share information online or via mobile.

- **Let's stay in touch online:** Nearly 80 percent will sign up online or for a mobile app to coordinate (81 percent) or communicate (79 percent) with their doctor's office.

- **There's an app for that:** More than 75 percent will sign up for a mobile app or Website to help them adhere to their doctor's treatment plan (77 percent) and track their health goals (76 percent).

- **Why can't we be friends?:** Almost 30 percent are willing to share Social Media profile information (such as Facebook, Twitter, Instagram, LinkedIn).

- **With age comes…:** Consumers over 50 are less likely (about 60 percent would) than consumers under 50 (about 80 percent or higher would) sign up for a mobile app or web site to help them track their health goals and adhere to their doctor's treatment plan.

KEY TAKEAWAYS

- **Healthcare lags behind retail and banking.** The majority of consumer interactions with healthcare providers are still face-to-face although retailers and banks are further along in interacting online.

- **Consumers are selective in sharing healthcare information.** They want physicians to be armed with electronic patient information but have distinct preferences on what they will share and how. They are less willing to share medical history, diet, and exercise information that may seem crucial to receive personalized care and treatment.

- **Healthcare organizations need to educate consumers on** how their personal electronic information, such as medical history, will be secure and private, as care gets coordinated among a network of physicians, labs, hospitals, and health insurers.

- **Digital health data is a relatively new frontier.** Consumers are not sure how companies will use it and are cautious about detrimental use: denial of insurance (although ACA guarantees coverage), job related background checks, or health discrimination.

- **Untapped opportunity for healthcare organizations.** They lag behind consumer readiness and adoption of online and mobile methods to track their health. For example, mobile apps and social media are widely used by retailers and banks to empower consumers. To create such opportunities, healthcare organizations need to understand the role of digital data to engage consumers and go beyond basics.

- **Accelerating digital initiatives in healthcare** will increase access to care while driving down costs, particularly to treat chronic conditions and to expand education and outreach. Health Insurance Exchanges (a centerpiece of ACA legislation) are becoming the norm for millions of Americans to purchase health insurance online.

- **Unleashing the potential for analytics and Big Data** requires breaking the barriers to aggregate health data to enable care management, personalized treatment, decision support for patients and providers, population health management, fraud and waste reduction, and other possibilities.

Visit infosyspublicservices.com for the Engaging with Digital Consumers survey announcement and complete results.

Engaging With Digital Consumers: Research Methodology

This comprehensive global research project studied consumer sentiment on Big Data issues in the retail, financial services, and healthcare industries in the United States, United Kingdom, France, Germany, and Australia. The study polled 1,000 consumers in each country via an online survey for a total global sample of 5,000 adults between the ages of 18 and 69. Independent research firms KRC and Vanson Bourne conducted the study; KRC surveyed the United States between May 3 and 7, 2013 and Vanson Bourne surveyed the remaining countries between May 8 and 22, 2013. To qualify for the survey, respondents had to be active Internet users and indicate whether they had made an online purchase during the previous six weeks. The majority of respondents also had to indicate whether they owned a smartphone or tablet computer.

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