

Insight Driven Health

Physician Leadership — The Key to Digital Healthcare Transformation

A large, stylized purple chevron graphic pointing to the right, composed of two parallel lines that taper to a point on the right side.

High performance. Delivered.



Overview of Accenture Doctors Survey 2015

Accenture commissioned a **six-country survey** of **2,619 doctors** to assess their adoption and attitudes toward electronic health records and healthcare IT.

The online survey included doctors across six countries: **Australia** (510), **Brazil** (504), **England** (502), **Norway** (302), **Singapore** (200) and the **United States** (601).



The analysis provided comparisons by country, sector, age and use.

The global survey was conducted online by Nielsen between December 2014 and January 2015. (The US survey was conducted online between December 2 and December 8, 2014.)

Doctors are increasingly using digital health

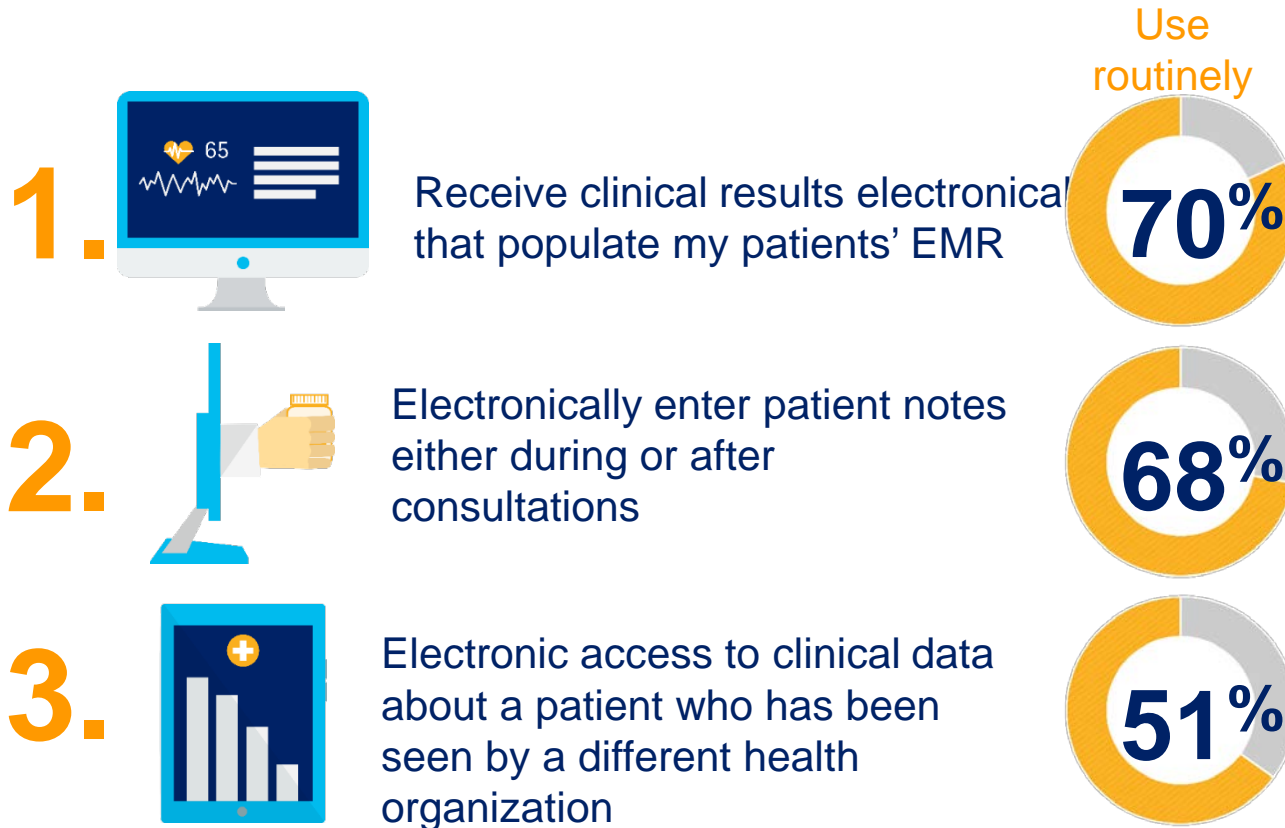
Vital signs of progress



Of surveyed doctors in England say they are **more proficient** using **electronic health records** in their clinical practices today than **two years ago**.

Base: All Qualified Respondents (n=601)
Q810 How much do you agree or disagree with the following statements?

Top healthcare IT functions now used routinely



But interoperability lags delay full potential

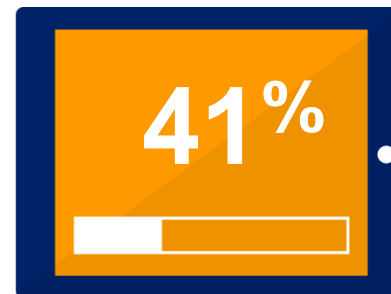
Interoperability lags

Just over half of surveyed doctors routinely **communicate electronically with clinicians in different health organization**



2015




Routine **electronic notification of patients' interactions** with other health organizations is slow to catch on.



Patient access to services is still lagging behind

Percent with service available to their patients (2015)



Access & Transactions	Global	England	Norway
 <p>Book/ change/cancel appointments</p>	37%	43%	36%
 <p>Request prescription refills</p>	34%	36%	33%
 <p>Access their medical information</p>	27%	12%	39%

*Note: Trended data are not available for Brazil and Norway, as this is the first year collecting data in these countries.

Base: All Qualified Respondents Australia (2015 n=510, 2012 n=500); England (2015 n=502, 2012 n=500); Singapore (2015 n=200, 2012 n=200); US (2015 n=601, 2012 n=500), Q925/Q740. Are the following functions available to your patients electronically? Can they (...)?

EMRs usability: A hard pill to swallow for doctors

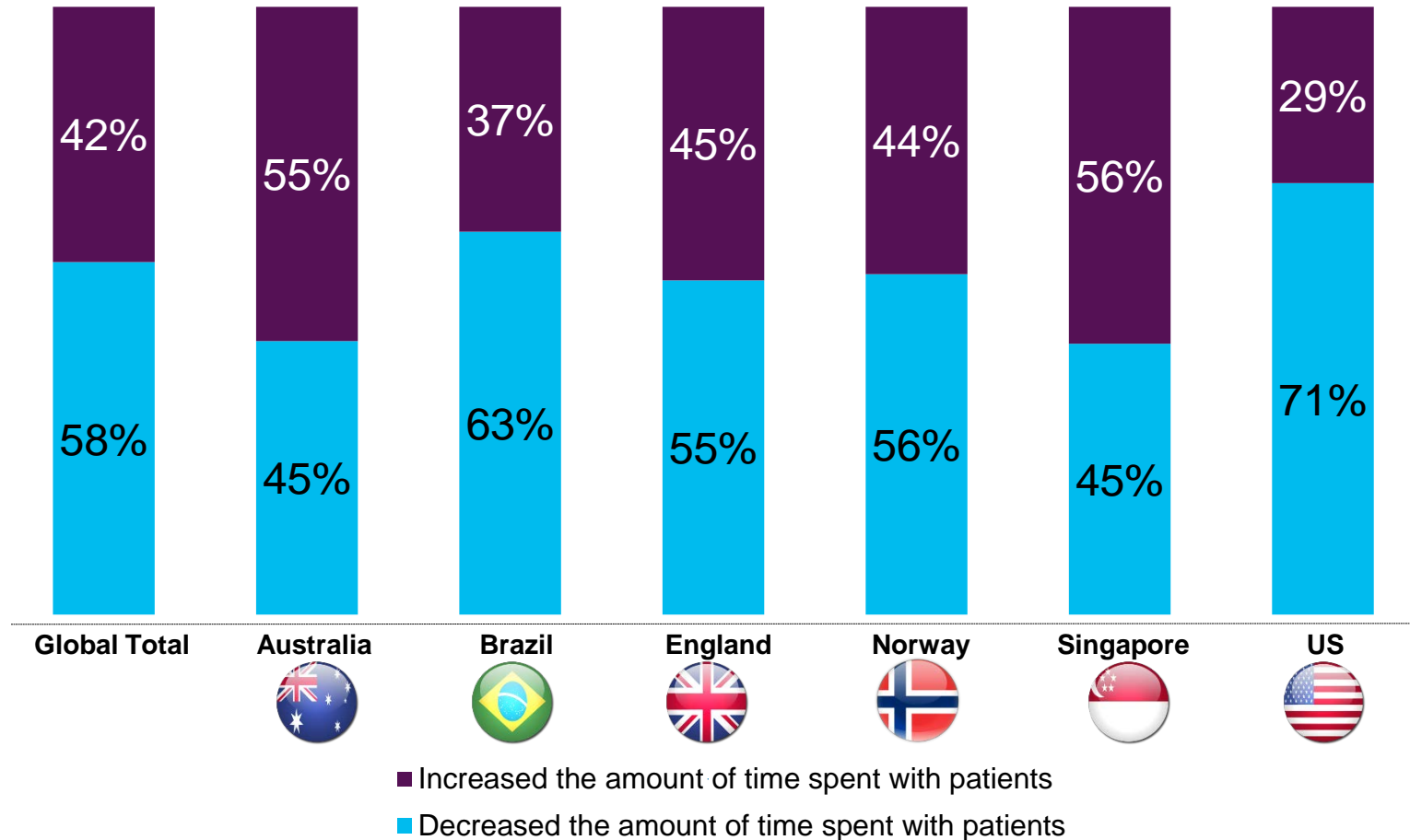
47%

Of surveyed doctors in England find EHR systems in their organizations to be **hard to use**



Doctors see health IT decrease time with patients

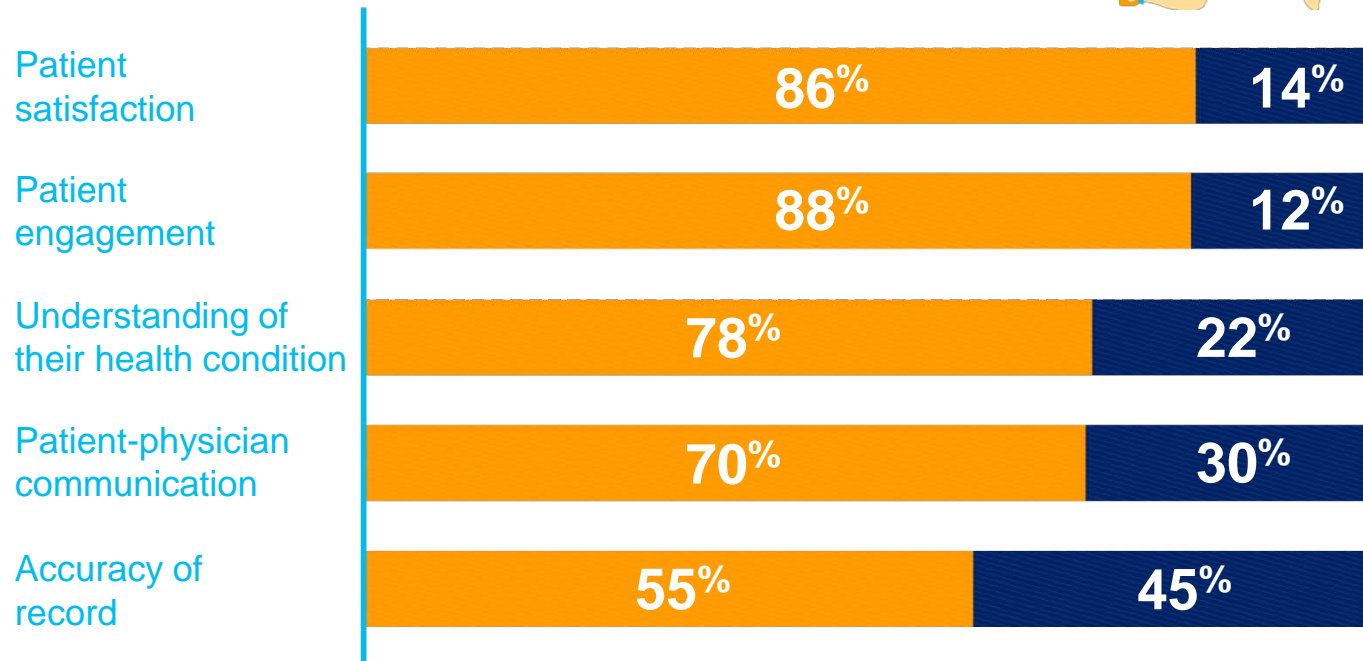
The use of healthcare IT has...



Base: All Qualified Respondents Total(n=2619);Australia(n=510);Brazil(n=504);England((n=502);Norway(n=302);Singapore(n=200);US(n=601)
Q735 Has the use of healthcare IT...

The paradox is they strongly believe patients benefit

A vast majority of surveyed doctors globally report that patient updating of personal electronic medical records (EMR) is helping:





Thank You