

Insight Driven Health

Physician Leadership — The Key to Digital Healthcare Transformation



High performance. Delivered.



Riga, May 12 2015

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

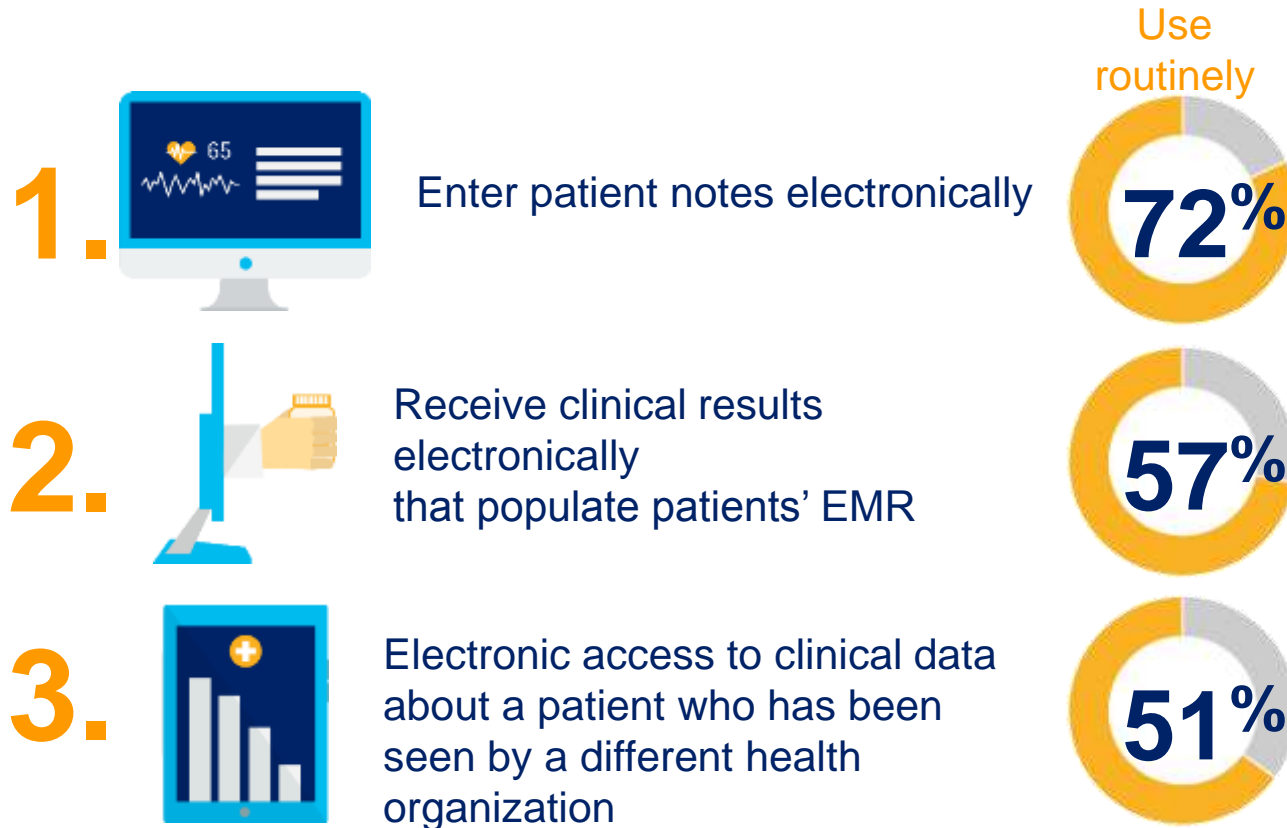


Of surveyed doctors say they are **more proficient** using **electronic health records** in their clinical practices today than **two years** ago.



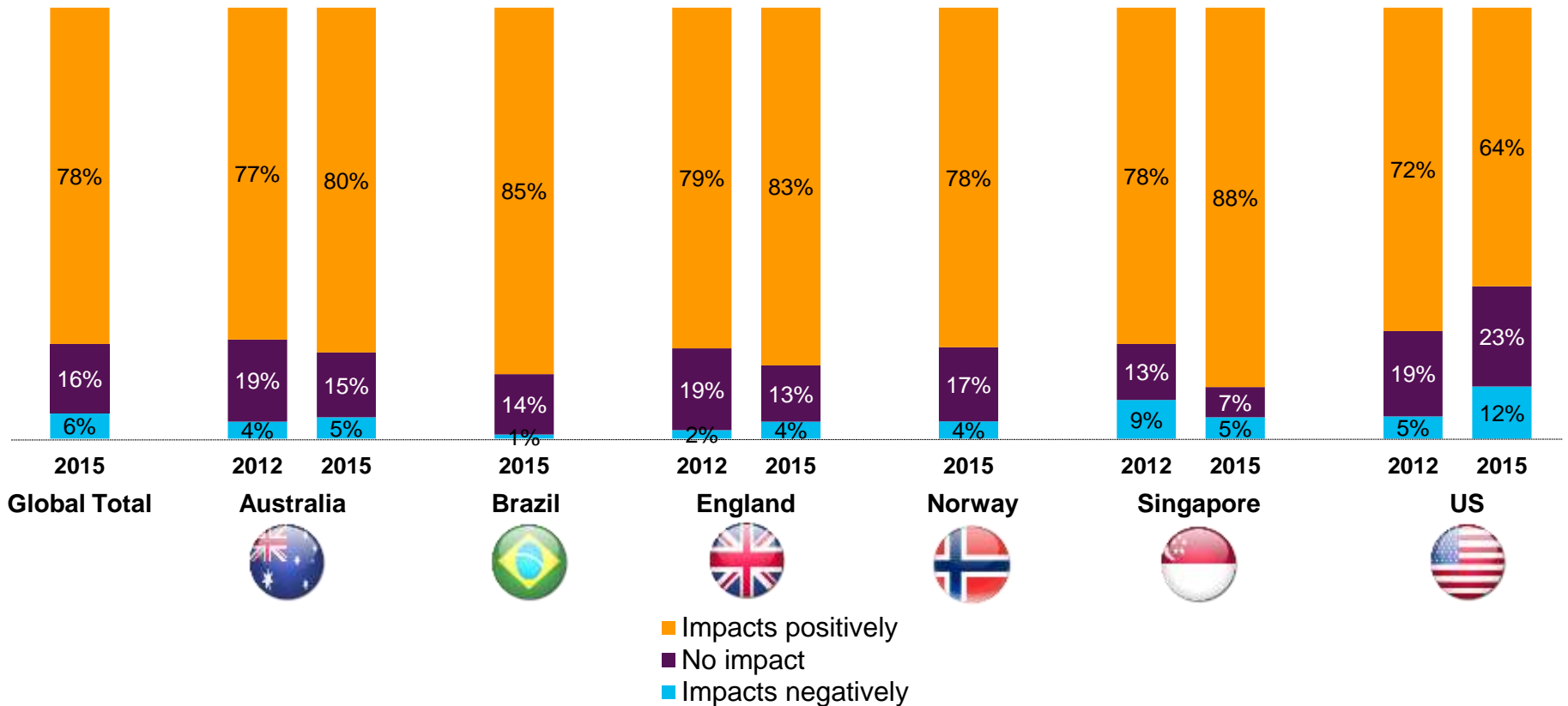
Base: All Qualified Respondents (n=601)
Q810 How much do you agree or disagree with the following statements?

Top healthcare IT functions now used routinely



Most doctors say EMR / HIE have a positive impact

Impact of EMR and HIE: Reduction in Medical Errors



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 (Reduced Base, Excludes Don't Knows), Unweighted Data

Q805. To what extent is the use of electronic medical records and health information exchange (HIE) enabling the following benefits?

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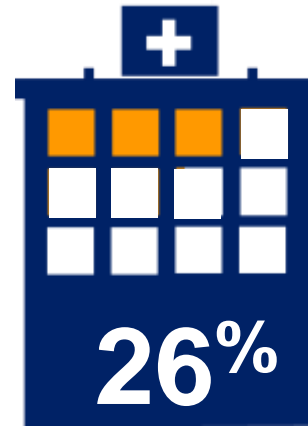
But interoperability lags delay full potential

Interoperability lags

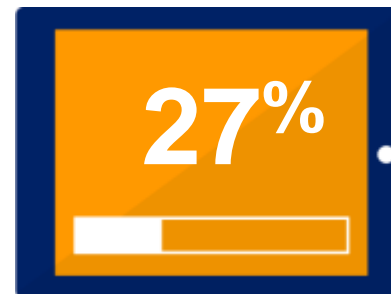
Just a quarter of surveyed doctors routinely **communicate electronically with clinicians in different health organization**

...and **only 16%** do so with **their patients**

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






2015



Patient access to services is still lagging behind

Percent with service available to their patients (2015)



	Global	England	Norway
 Book/ change/cancel appointments	37%	43%	36%
 Request prescription refills	34%	36%	33%
 Access their medical information	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

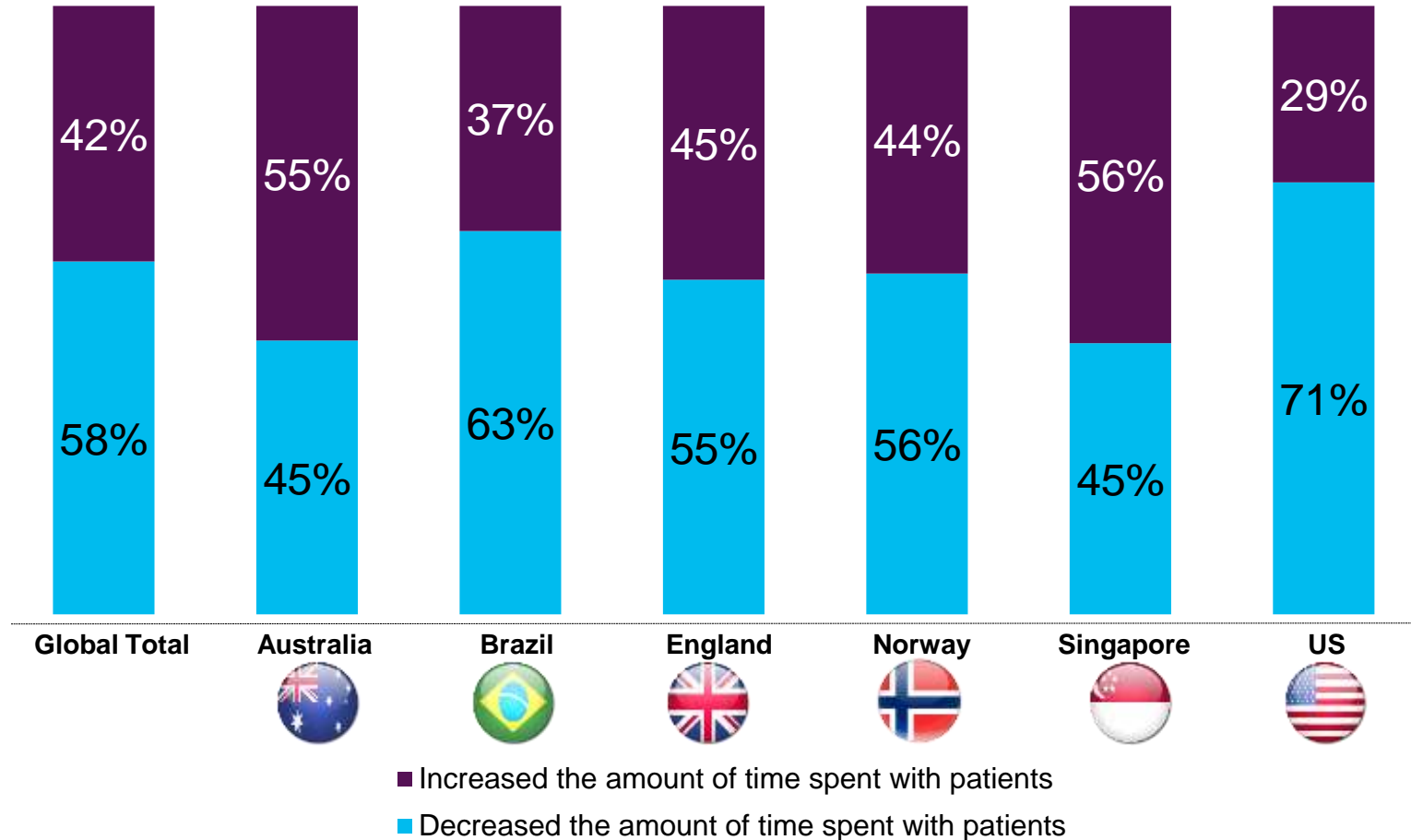
49%

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



Doctors see health IT decrease time with patients

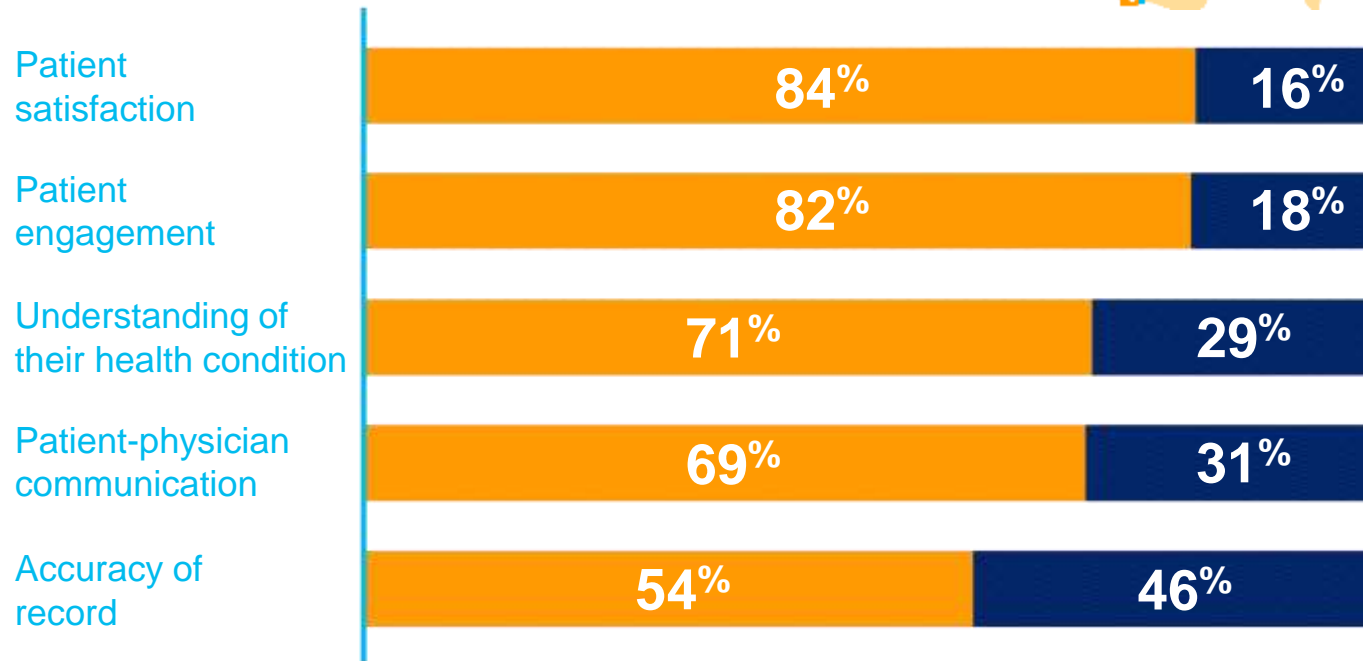
The use of healthcare IT has...



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:



Physician Leadership -The Key to Digital Healthcare Transformation - Panelists



**Richard
Corbridge**

Chief Information
Officer,
HSE, Ireland



**Pr. George
Crooks**

Medical Director
NHS24,UK



**Dr Jasper
zu Putlitz**

Managing Director,
Accenture Strategy,
Germany



**Simon
Stone**

Chief Clinical
Architect,
Oracle Healthcare,
UK

Panel Questions

For discussion:

Physician leadership – where has it driven effective use of broad-based Healthcare IT?

Mobilising physician leadership - what must commissioners of Healthcare IT systems do differently?

Physician culture - what changes are needed for doctors to lead full patient engagement in the use of digital channels?

Vendors - what should they change to ensure effective physician leadership in Healthcare IT design and adoption?



Thank You

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