Introduction

To understand how Americans today communicate with their healthcare providers, their opinions on telemedicine and wearable devices, and their experiences with post-discharge care, Salesforce conducted its "Connected Patient Report." The survey was completed online within the United States by Harris Poll on behalf of Salesforce from June 8-10, 2016, with 2,025 U.S. adults, ages 18 and older, among whom 1,736 have health insurance and a primary care doctor. The report found that people primarily interact with their physicians through in-person visits, phone calls and emails, but are open to virtual care treatment options enabled through technology. The report also explored how wearable devices may one day impact the patient-doctor experience, with younger generations more likely to own wearables and more willing to share their health data with doctors and insurance companies. Finally, the report found that following discharge from a hospital or clinic, insured adults with a primary care provider strongly believe improvements can be made to their experiences through better communication with their primary care doctor and throughout their care network.

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I. Doctor-Patient Communication Today

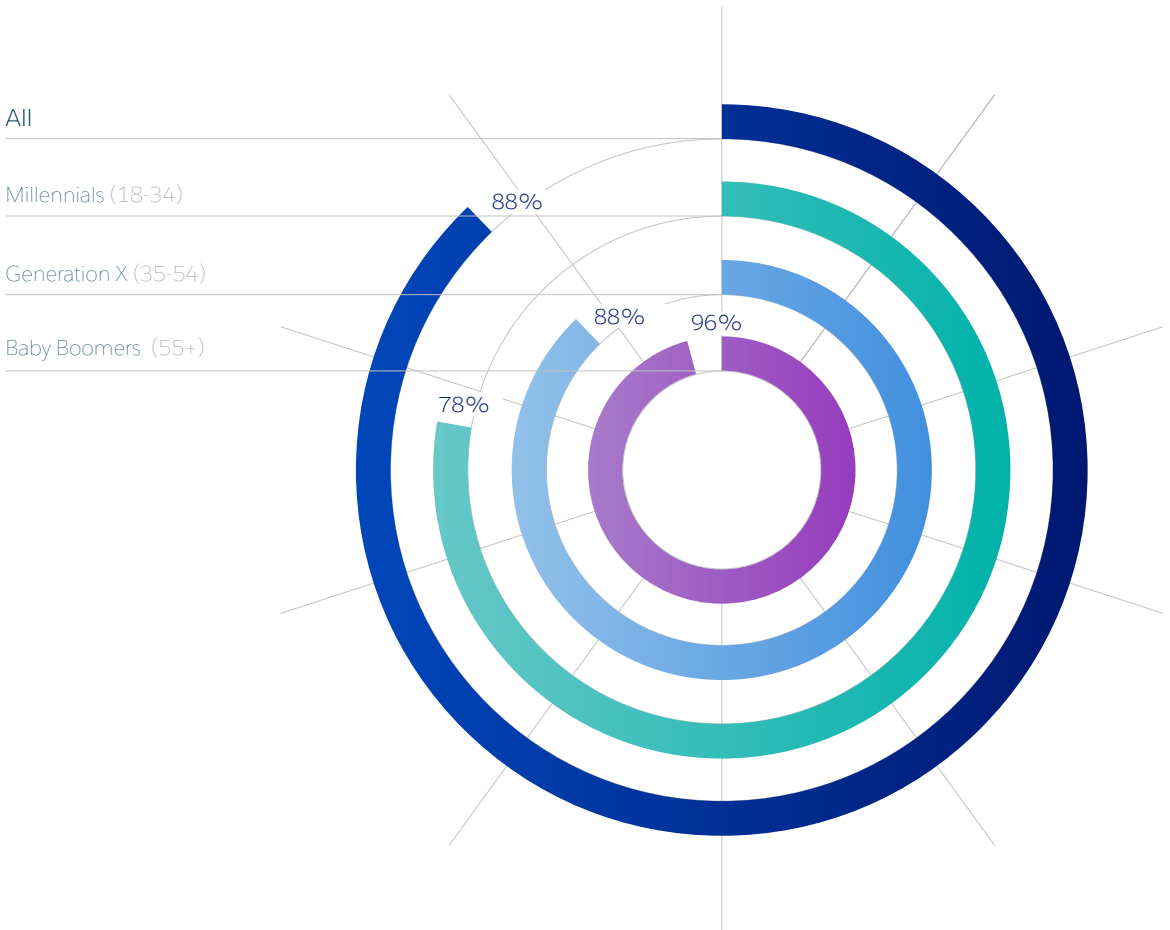
88% of patients surveyed currently have health insurance

Communication today between doctors and patients – activities such as setting up appointments, getting test results or filling prescriptions – is still traditional in nature (in-person meeting or over the phone). This trend extends to keeping track of health records, as 62% of insured adults with a primary care provider rely on their doctors to manage them, and nearly a third of respondents (29%) keep them in a home-based physical storage location like a folder or shoebox.

Base: All respondents

Do you currently have health insurance?

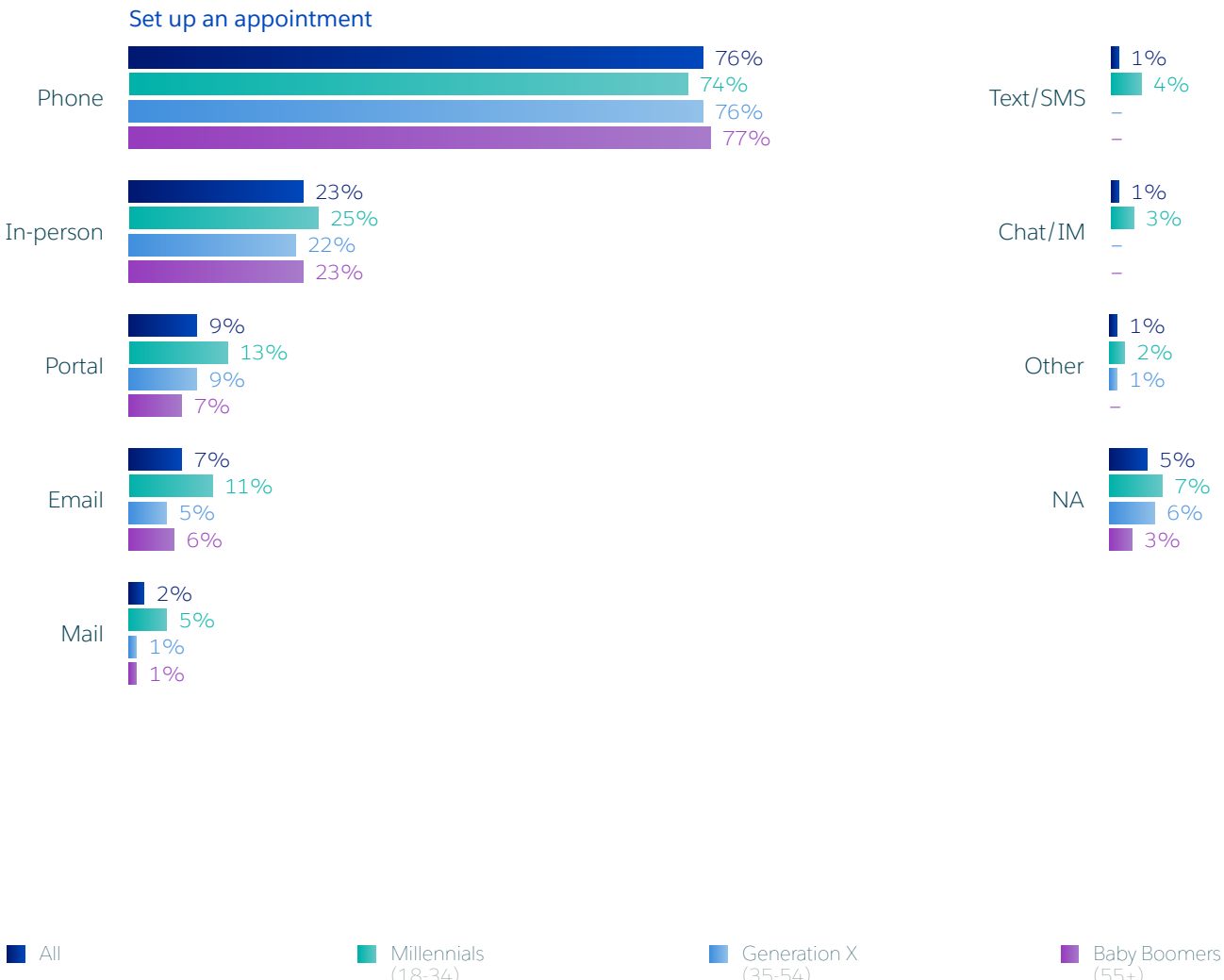
Answer: Yes



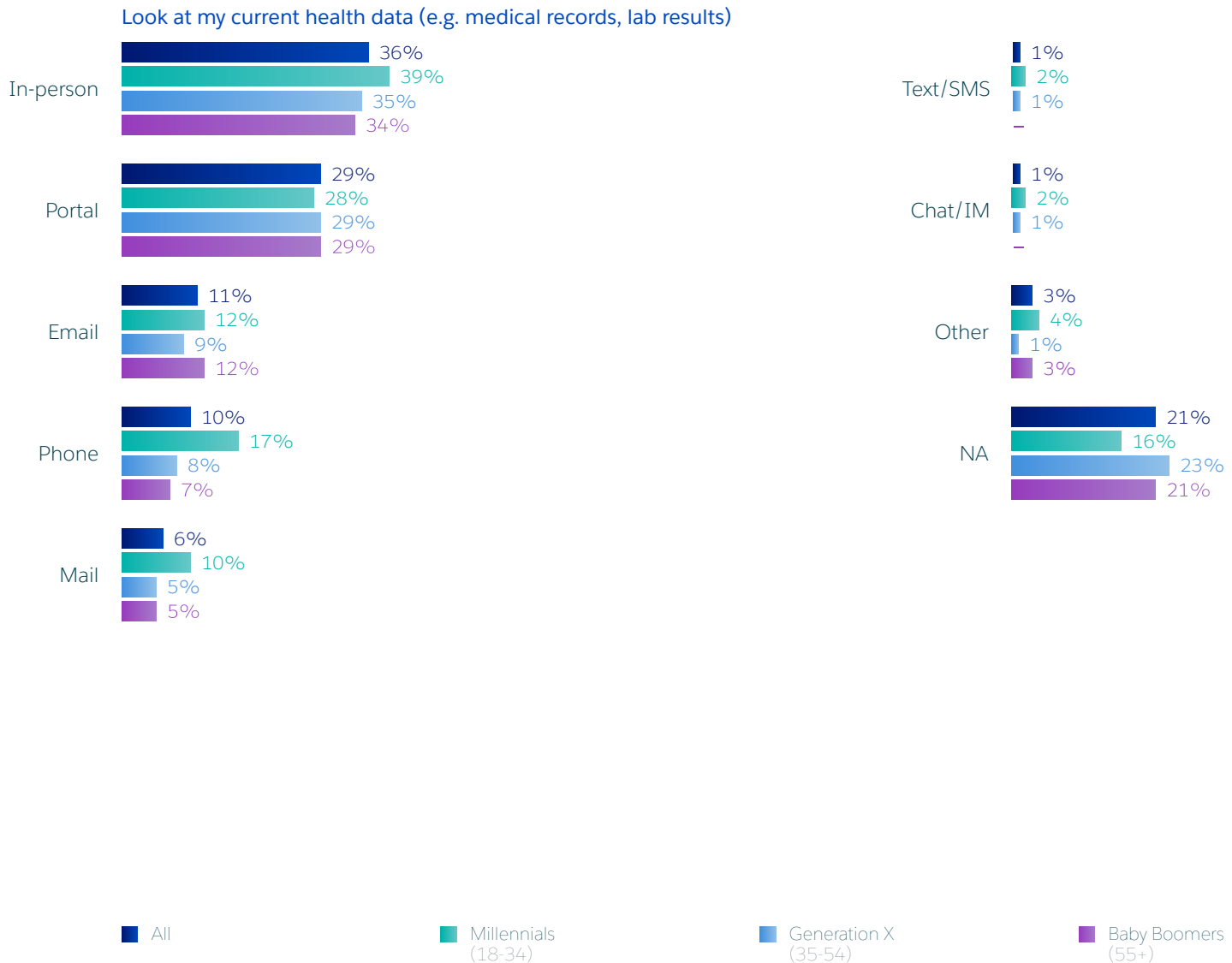
Interestingly, nearly half of adults (48%) have had the same doctor over the past 10 years, yet 33% feel their doctors would not recognize them walking down the street. That said, respondents overall are very satisfied (91%) with their primary care doctor, and if they changed doctors in the last 10 years nearly half did so it was due to either one of them moving.

Base: Have health insurance and a primary care doctor

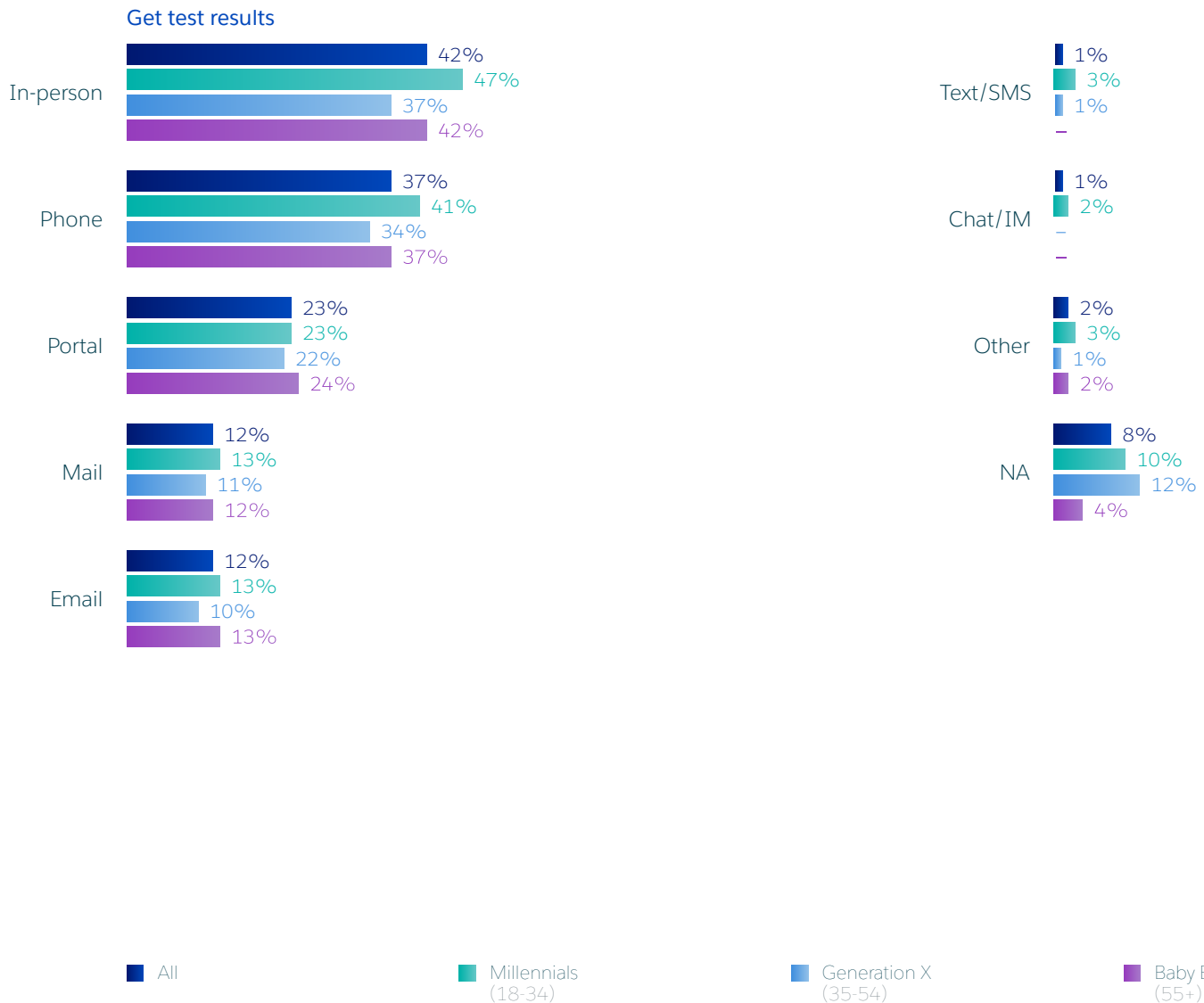
Which of the following, if any, do you use to communicate with your primary care doctor for each of the following?



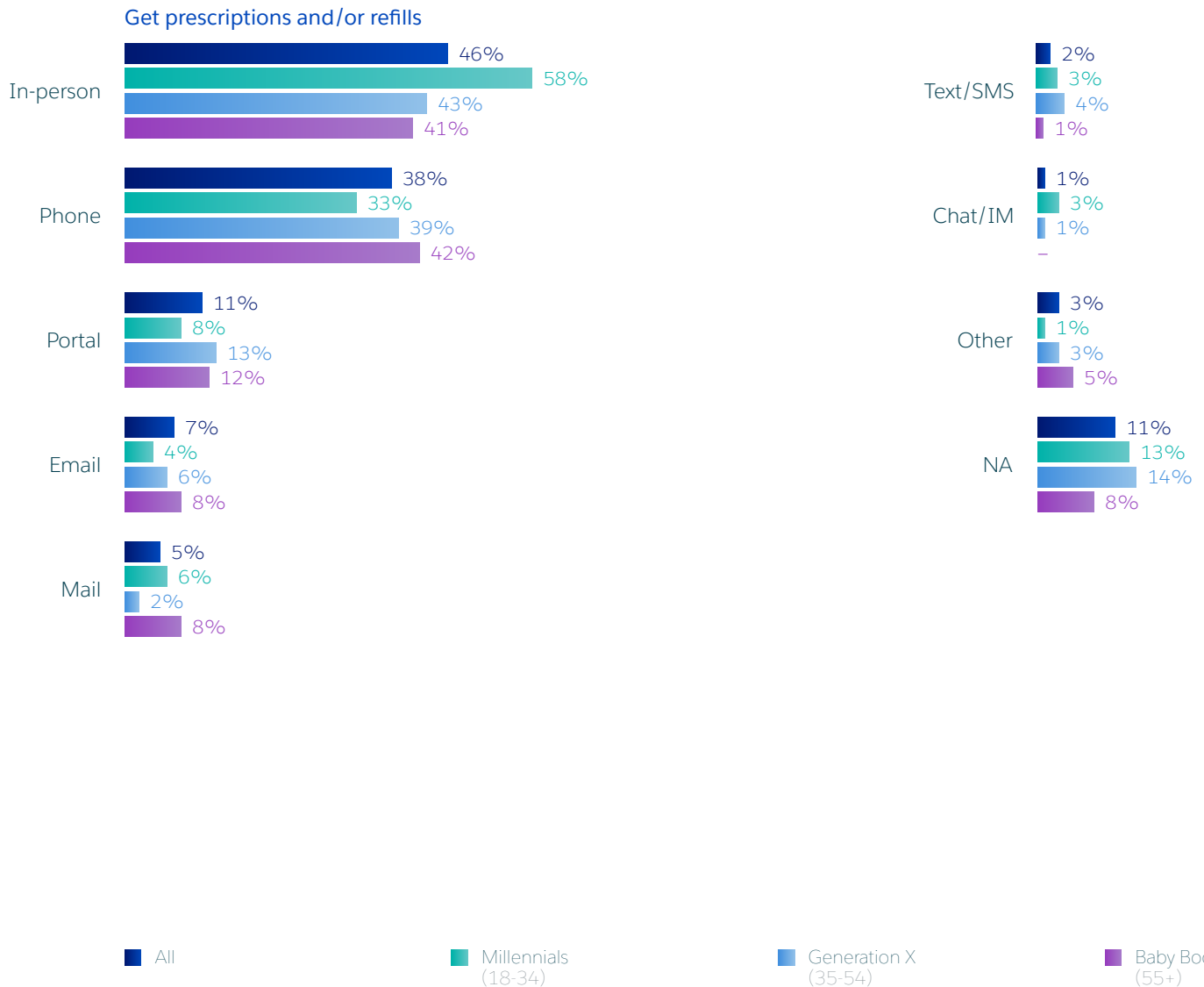
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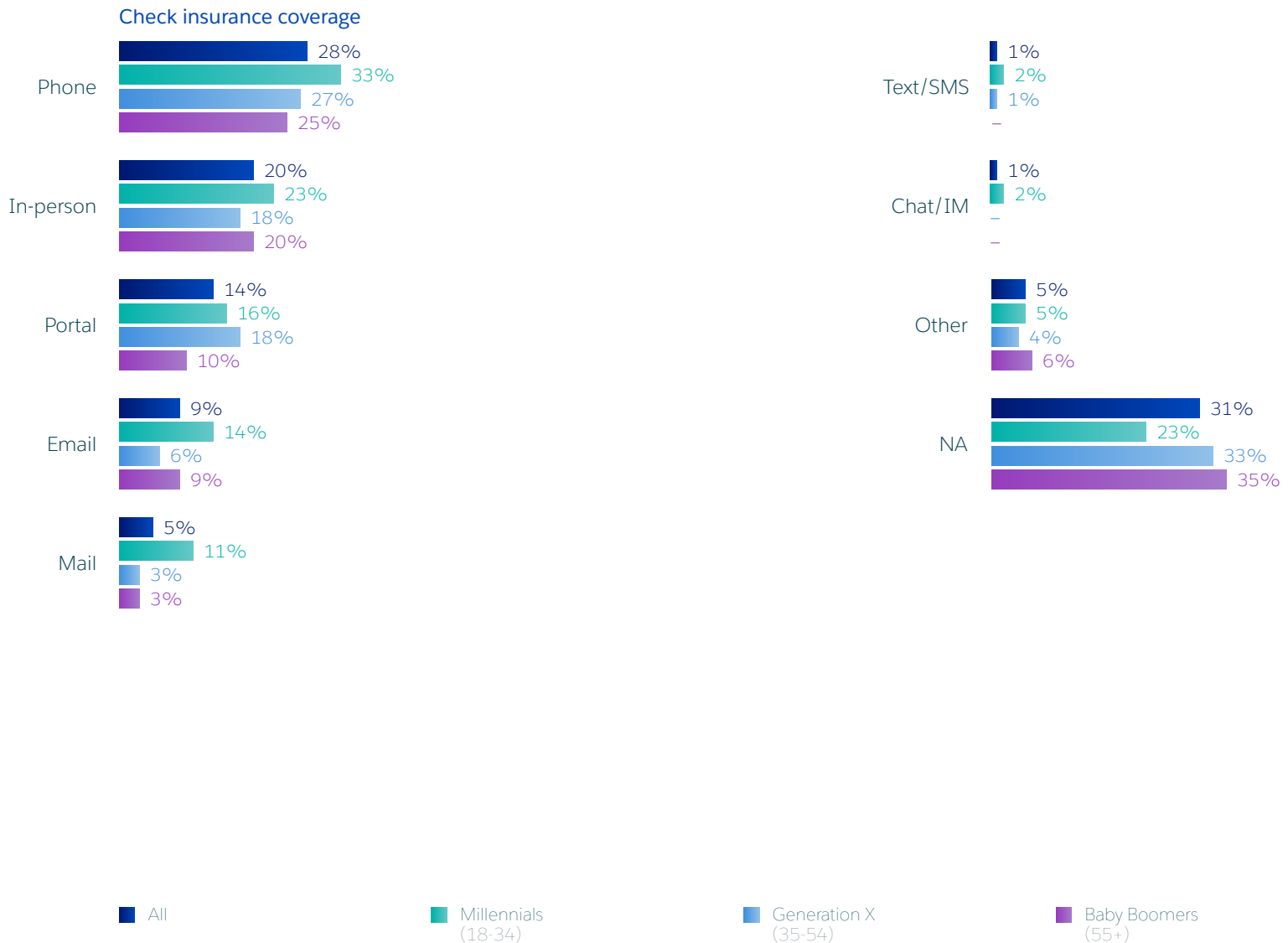
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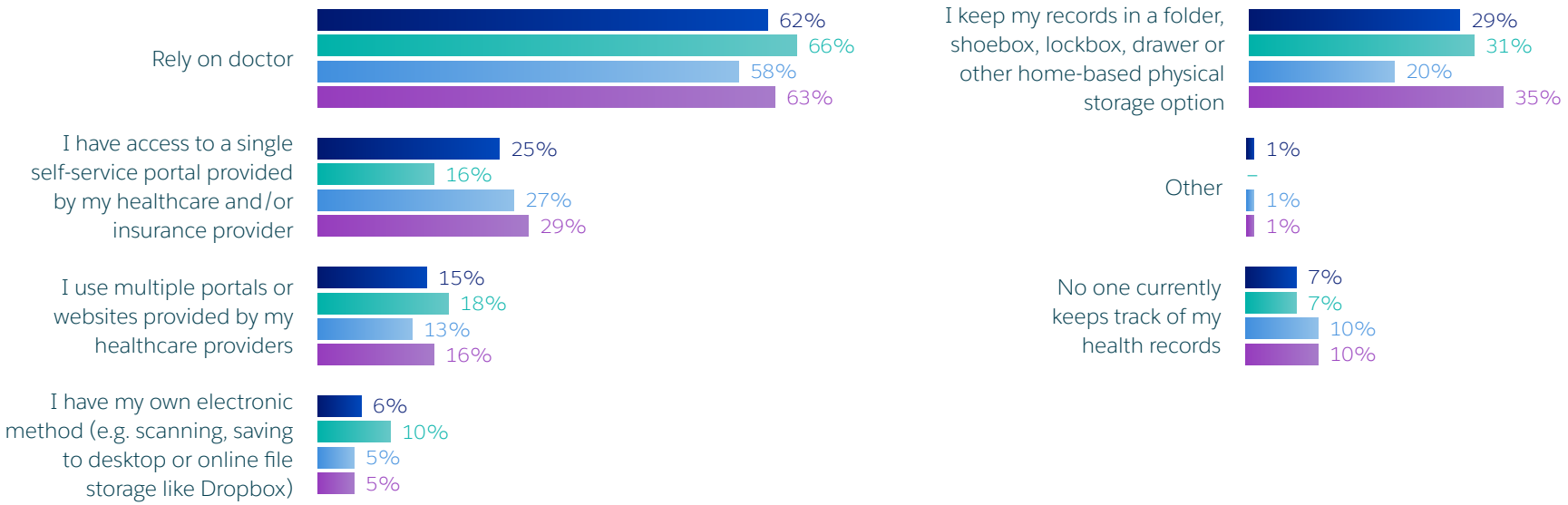


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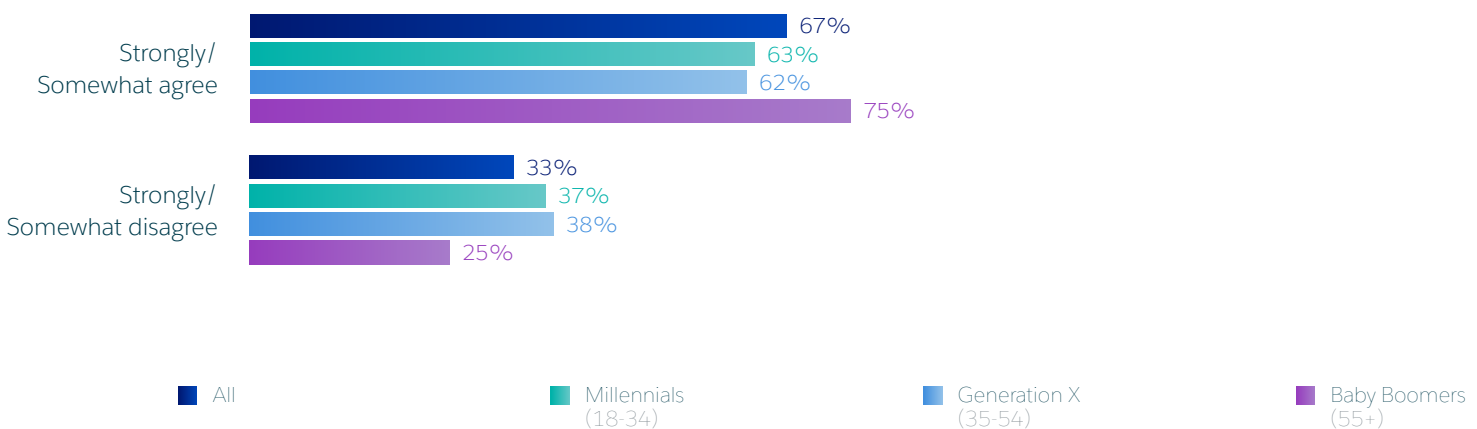


Nearly a third keep their records in a home-based physical storage location

How do you currently keep track of your health records? Select all that apply.



If I walked past my primary care doctor while walking down the street, they would recognize me.



Even with high satisfaction, a majority of patients have changed doctors in the last 10 years

Overall, how satisfied are you with your primary care doctor



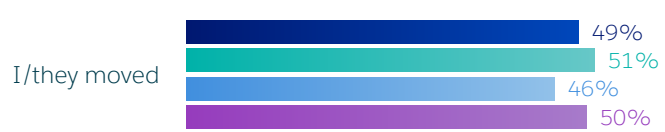


Have you changed doctors in the past 10 years?





Which of the following, if any, are reasons why you changed doctors within the last 10 years?











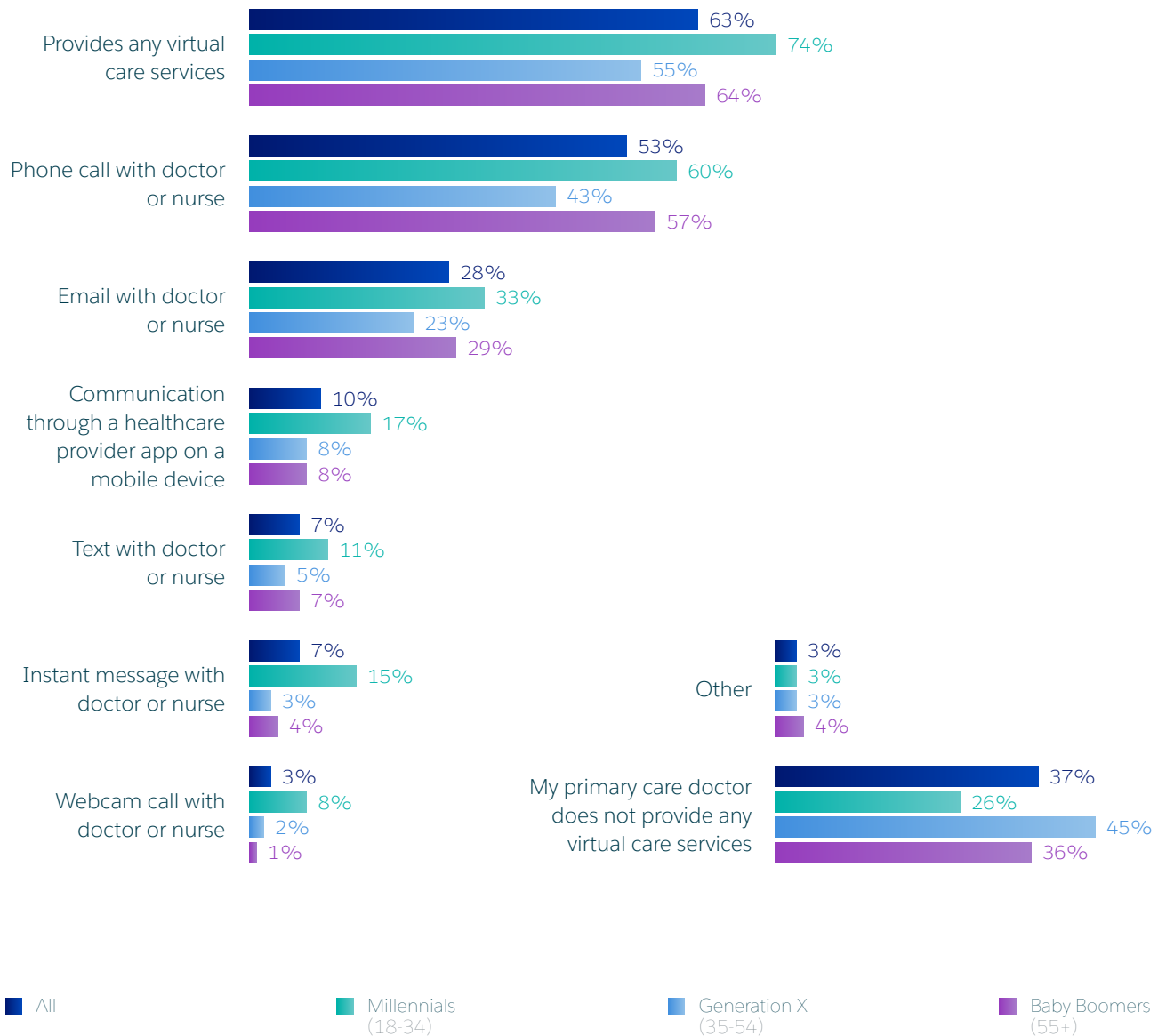


All | Millennials (18-34) | Generation X (35-54) | Baby Boomers (55+)

63% of respondents report their providers offer virtual care services

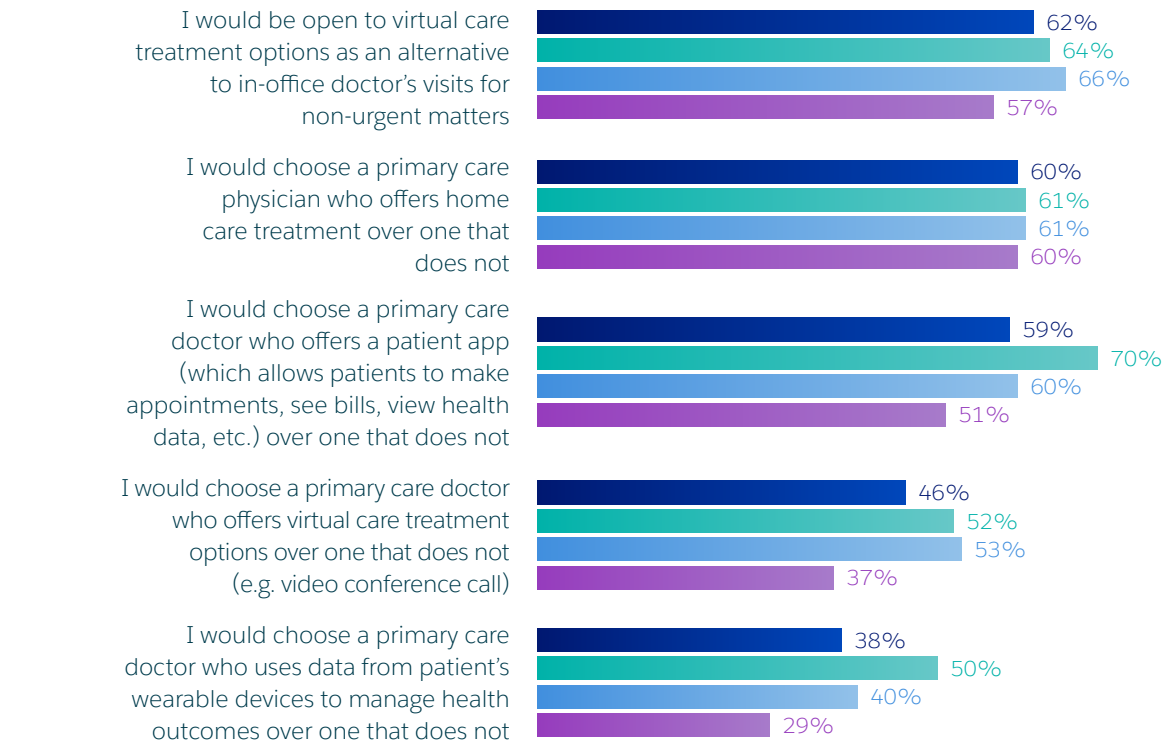
Sixty-three percent of insured adults say their primary care physician provides virtual care services enabled by technology, but these are mainly delivered through legacy technologies such as phone (53%) or email (28%). Despite this, mobile engagement is important among respondents, with 59% saying they would choose a primary care doctor who offers a patient mobile app (allowing patients to make appointments, see bills, view health data, etc.) over one that does not.

What types of virtual care services does your primary care doctor provide? Select all that apply.



Interestingly, 62% say they strongly or somewhat agree that they would be open to virtual care treatments such as a video conference call, as an alternative to an in-office doctor's visit for non-urgent matters. And 52% of Millennials would actually choose a primary care doctor who offers virtual care treatment options over one that does not.

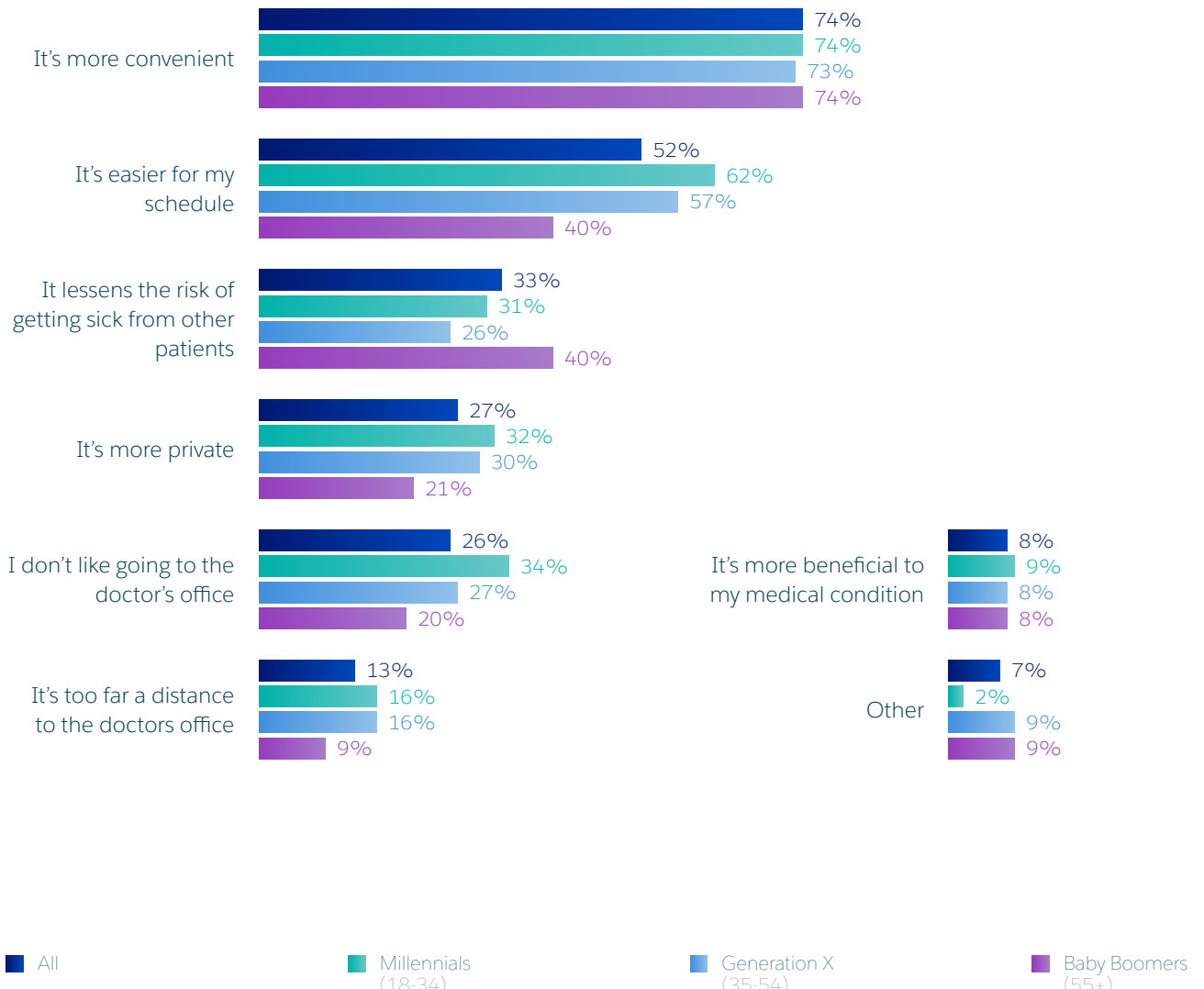
I strongly/somewhat agree with the following statements:



Among those open to virtual care, they report clear reasons for their preferences around telehealth, with 74% stating it is more convenient, 52% it is easier for their schedules and 33% it lessens the risk of getting sick from other patients.

Base: Would be open to virtual care.

Why would you be open to a virtual care treatment option as an alternative to an in-office visit?

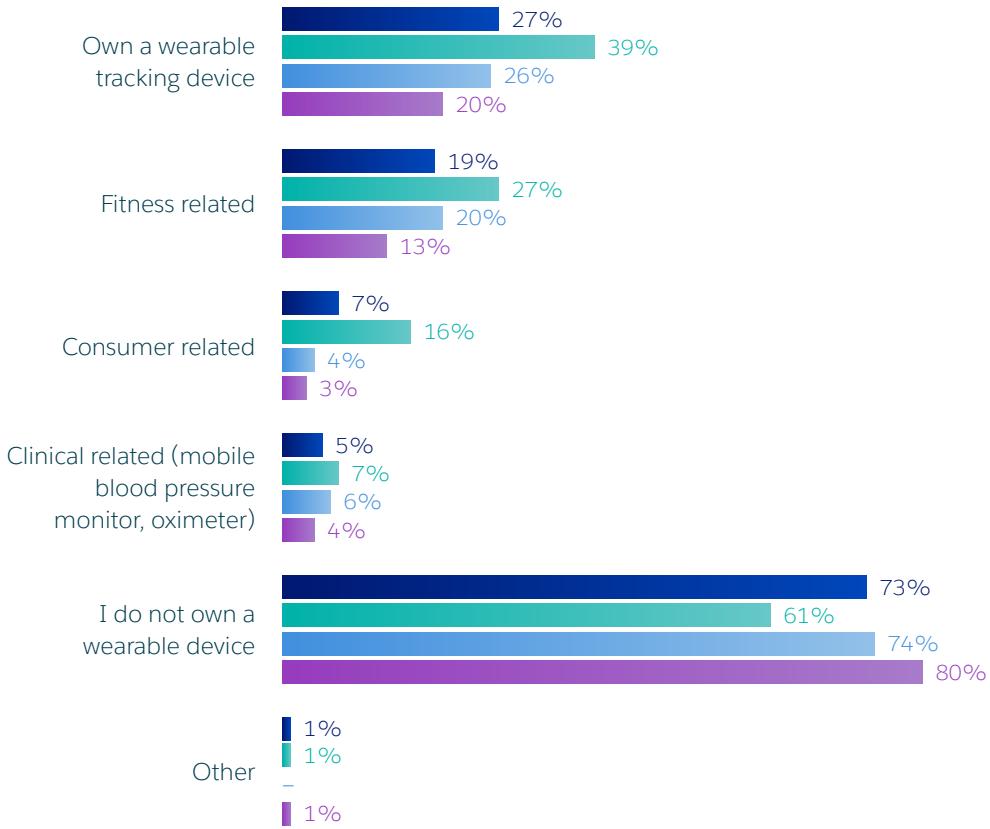


III. Wearables in Health

39% of Millennials own a wearable device, highest among generations surveyed

Despite lack of broad deployment of wearables in the healthcare space, 62% of respondents claim they would choose a primary care physician who uses data from their wearable devices to manage their health outcomes, over one that does not. Of those insured adults who own a wearable, 78% would want their doctors to have access to health data from their wearable devices, so providers can have a more up-to-date view of their health (44%), be able to see trends in health data in order to diagnose a condition before it comes serious or terminal (39%) and to receive more personalized care (33%).

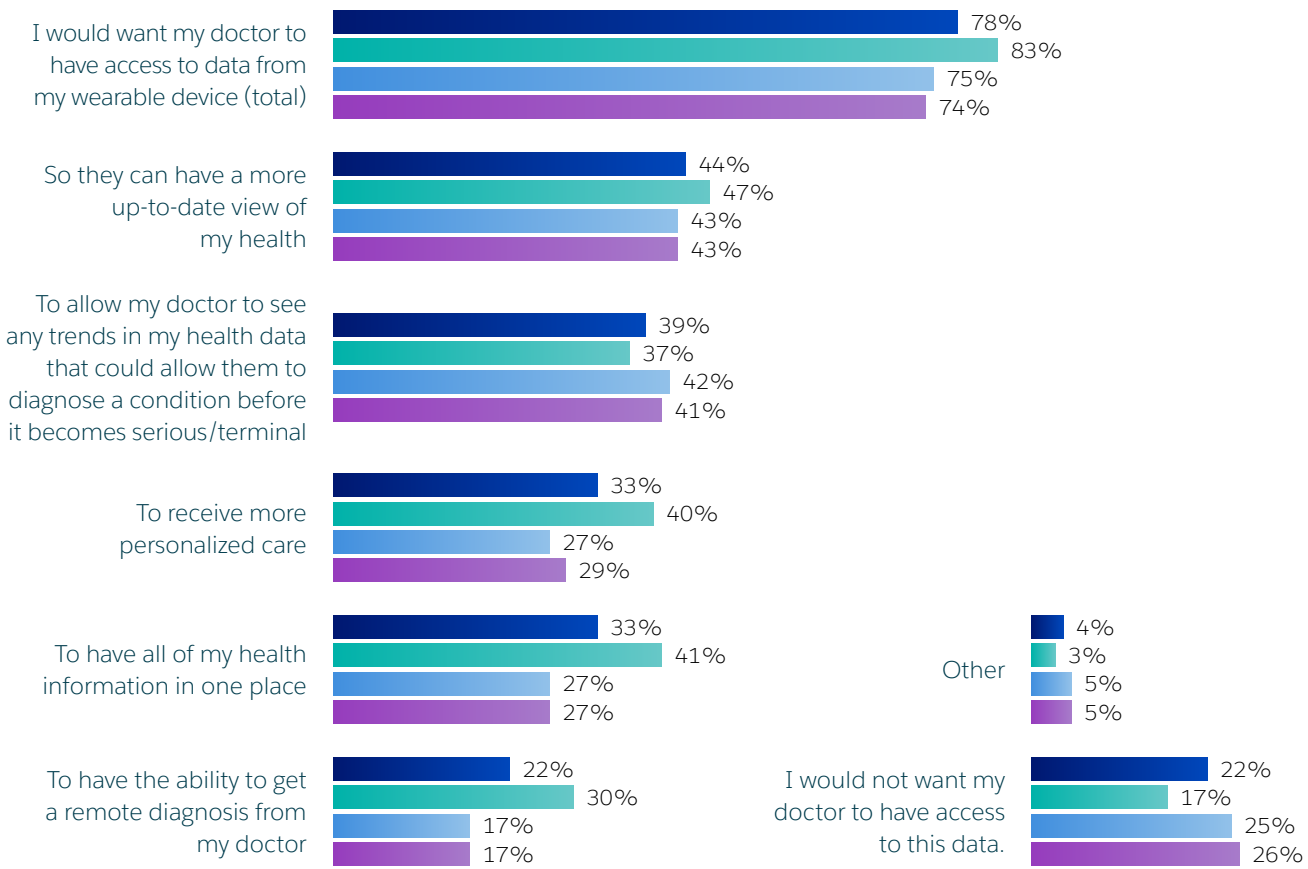
What types of wearable health tracking device to you currently own?



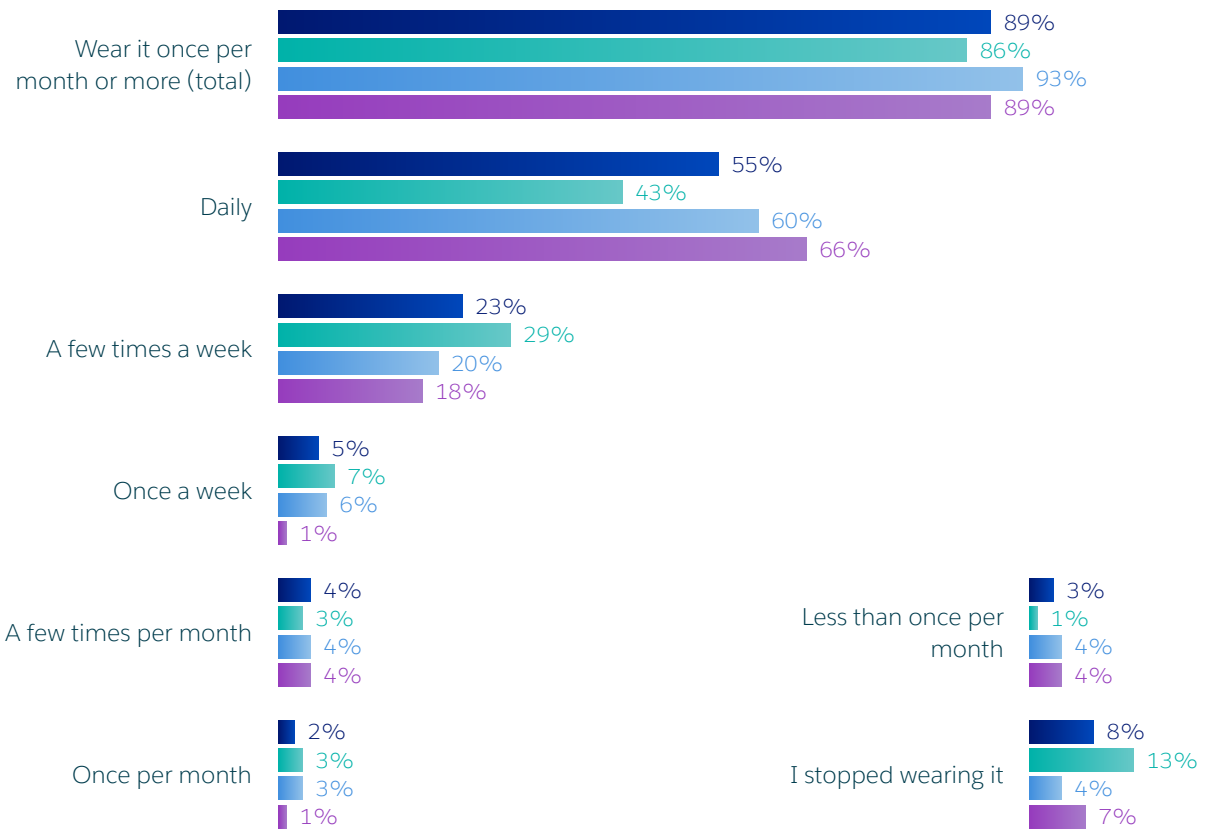
Millennials are willing to go a step further, with 62% stating they use a wearable health tracking device given by a healthcare provider in order to support managing their health in exchange for access to the data provided by the device – and 67% would be very or somewhat likely to use a wearable tracking device given to them by their insurance company in exchange for better health insurance rates.

Base: Own a wearable health tracking device.

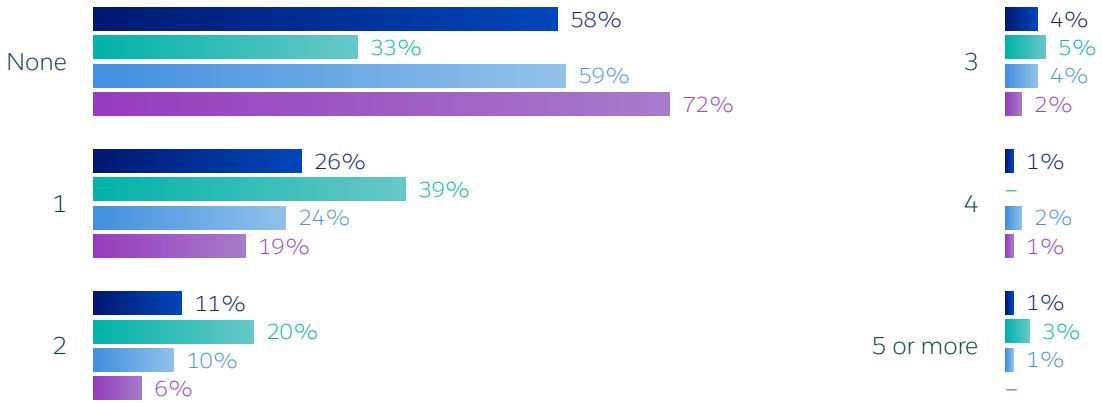
Why would you want your doctor to have access to data from your wearable device? Select all that apply.



In the last 12 months, how often did you wear your wearable health tracking device?

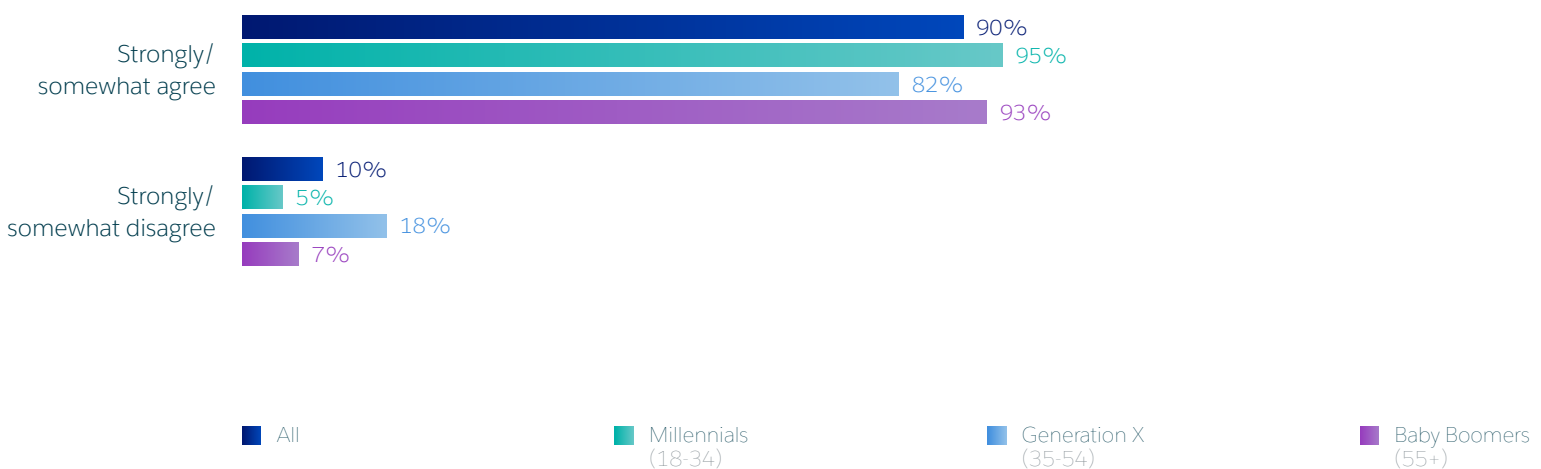


How many apps do you currently use to track your health, nutrition or fitness data?



Base: Use more than one fitness app.

How much do you agree or disagree with the following statement: I would like my healthcare/nutrition/fitness apps to be able to integrate and share data together.

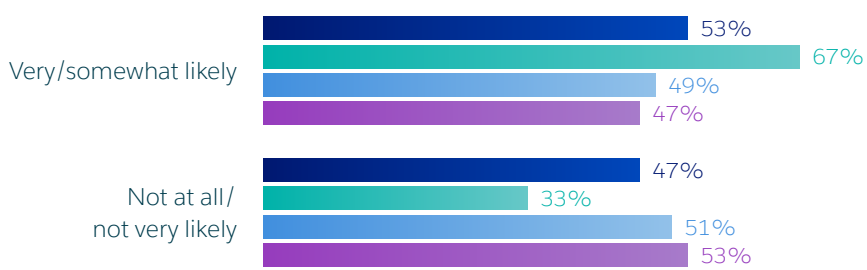


How likely would you be to use each of the following.

A wearable health tracking device given to me by my healthcare provider to support managing my health in exchange for access to all my health data provided by the device



A wearable health tracking device given to me by my insurance company in exchange for potentially better health insurance rates based on data provided by the device



All | Millennials (18-34) | Generation X (35-54) | Baby Boomers (55+)

IV. Post-Discharge Care

After leaving the hospital, more than half of patients had to visit more than one doctor

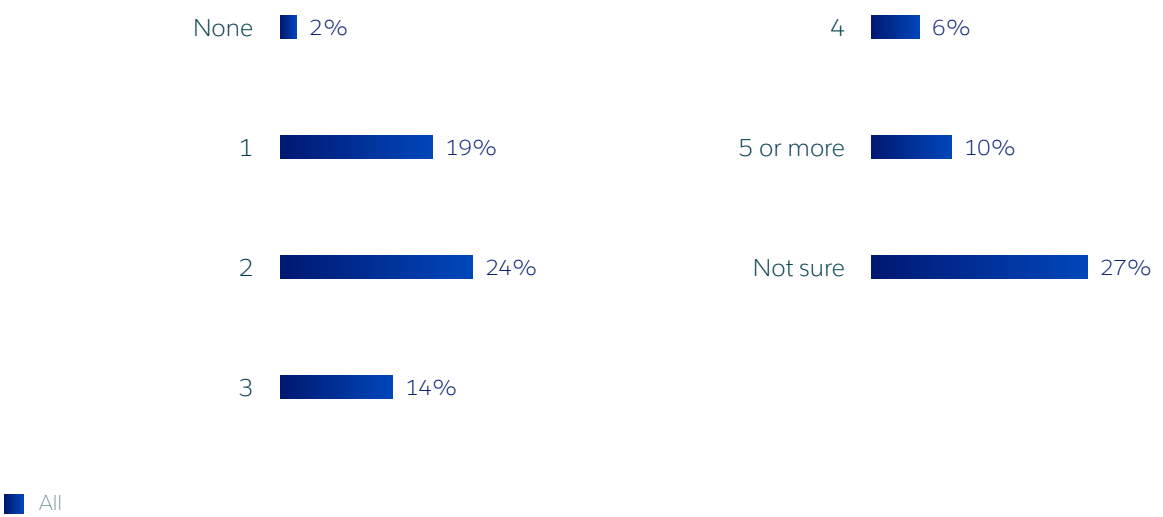
More than a quarter (26%) of insured adults with a primary care doctor report being hospitalized, or having a family member hospitalized within the last two years. According to this report, the complexity around the U.S. healthcare system emerges after being discharged from the hospital, with 54% of patients visiting two or more, and 10% visiting five or more, healthcare professionals.

Have you or a family member been hospitalized for any length of time within the last two years?



Base: Have been or had a family member hospitalized in last two years.

Post-discharge, how many healthcare professionals did you or your family member visit?



This potentially disconnected set of caregivers may be the reason why 61% of those who themselves or family member had been hospitalized in past two years say that improvements can be made in the post-discharge process, including better communication between their primary doctor and other members of the care team; better communication with their primary care doctor in general (31%); and more modern technology to manage their health data across various providers (27%).

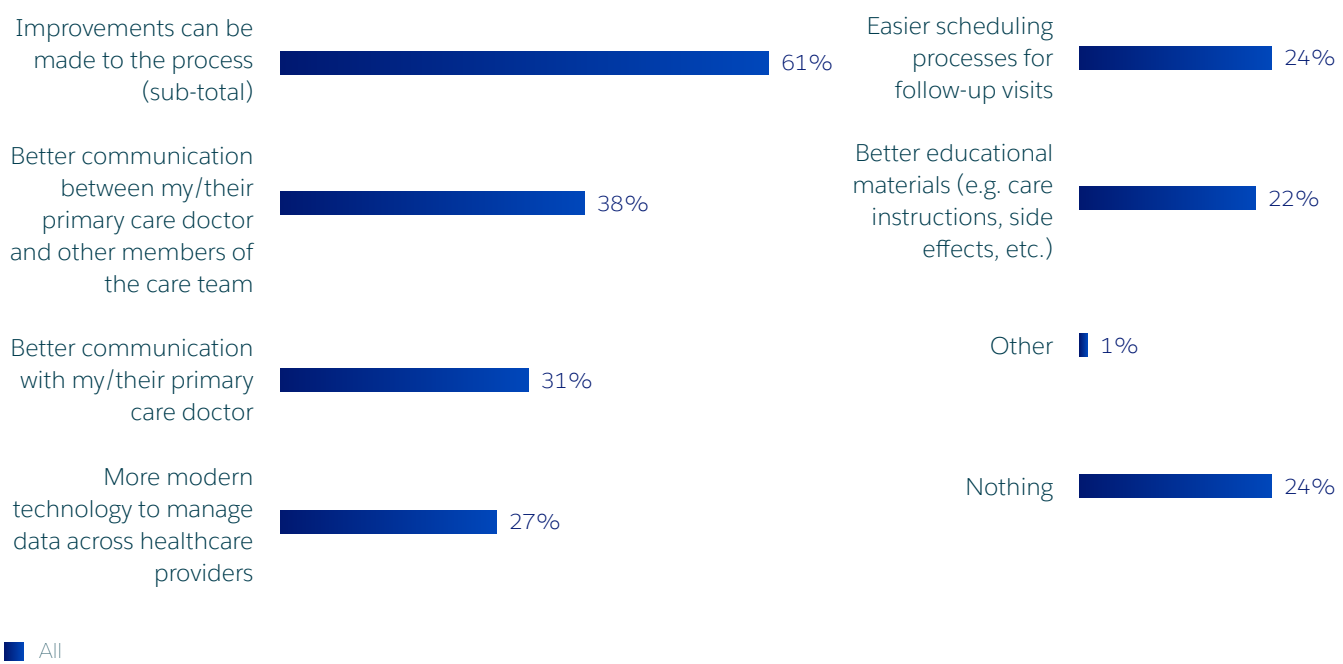
Base: Have seen any healthcare professionals post-discharge from the hospital or provider.

Post-discharge, did the healthcare professionals have access to your/their current health data all in one place?



Base: Have been or had a family member hospitalized in last two years.

Which of the following improvements, if any, could be made to the post-discharge process?



V. Methodology

This survey was conducted online within the United States by Harris Poll on behalf of Salesforce from June 8-10, 2016, among 2,025 U.S. adults ages 18 and older, among whom 1,736 have health insurance and a primary care doctor. This online survey is not based on a probability sample, and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables, please contact Joel Steinfeld at jsteinfeld@salesforce.com.

