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Preview:

**2009 Survey of
Health Care Consumers:
Select Findings relevant to
Guided Self Care Management**

March 3, 2009

Deloitte Center for Health Solutions
Washington DC

Model: Behaviors, attitudes and unmet needs in six zones of consumerism were the focus of the 2009 survey

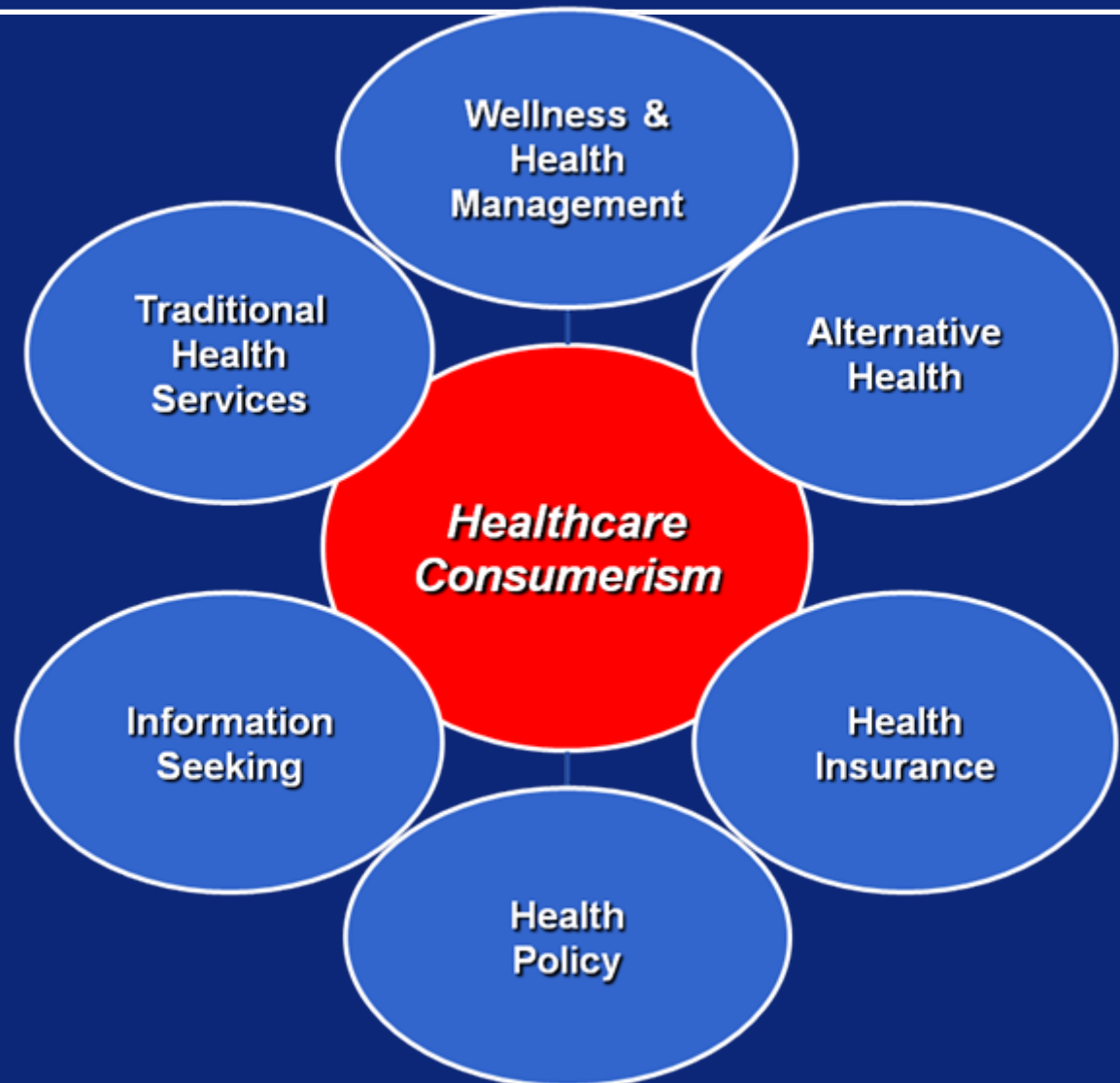
Consumers are typically referred as “patients”
In context of traditional services...

“enrollees” in health insurance....

“clients” in wellness and Alternative settings...

“voters” in health policy..

“users” when searching for information



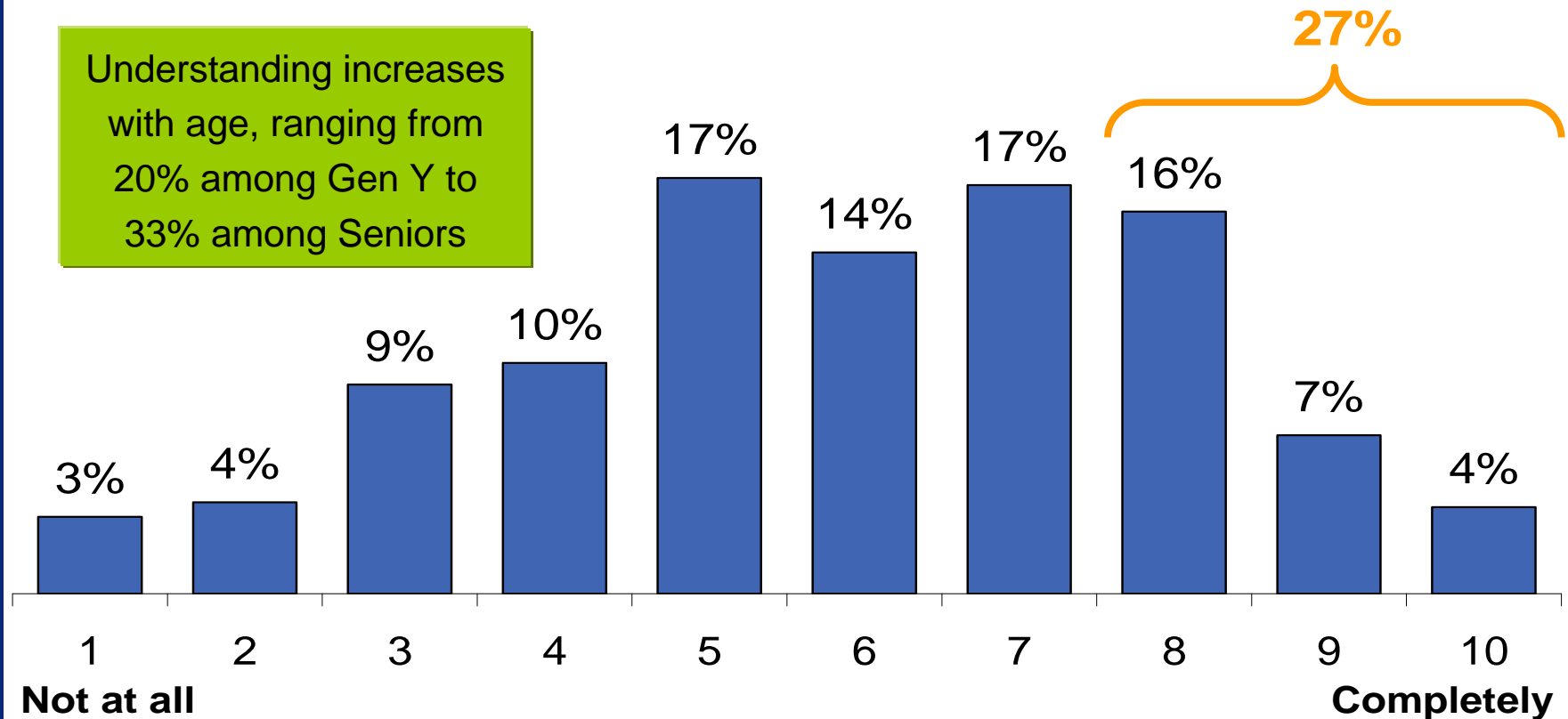
Methodology: 2009 Survey

- Total sample: 5,665 online survey October 2-10, 2008:
 - 4,001 adults – a nationally representative sample matched to age, gender, income, race/ethnicity, and geography
 - 1,664 additional adults interviewed to achieve adequate subsamples for comparisons for 10 states, 10 major metropolitan markets, 7 insurance cohorts and others
- English and Spanish versions offered
- 95 questions, 42 potential follow-up probes: behaviors (prior 12 months) asked before attitudes and unmet needs to reduce respondent bias
- +/- 1.6% margin of error for U.S. point estimates
- Comparisons to 2008 survey findings
 - Online survey of 3,000 US adults conducted October 10-23, 2007

*What is the context for considering
guided self care management as a
strategic initiative in healthcare?*

Understanding of the U.S. health care system varies widely: most are “somewhat confident” in their comprehension

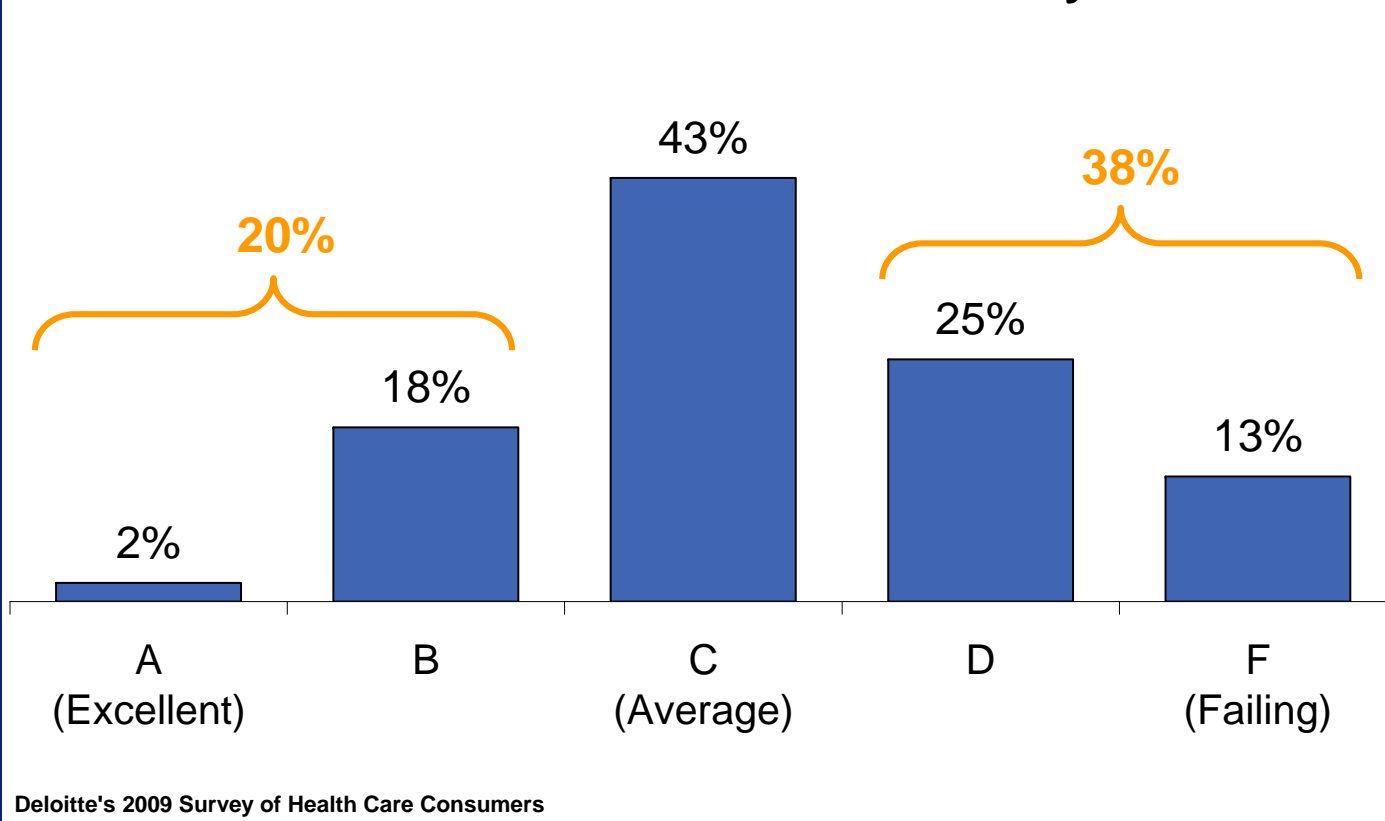
How Well Do You Think You Understand How the U.S. Health Care System Works?



Deloitte's 2009 Survey of Health Care Consumers

Only one in five rates the system favorably

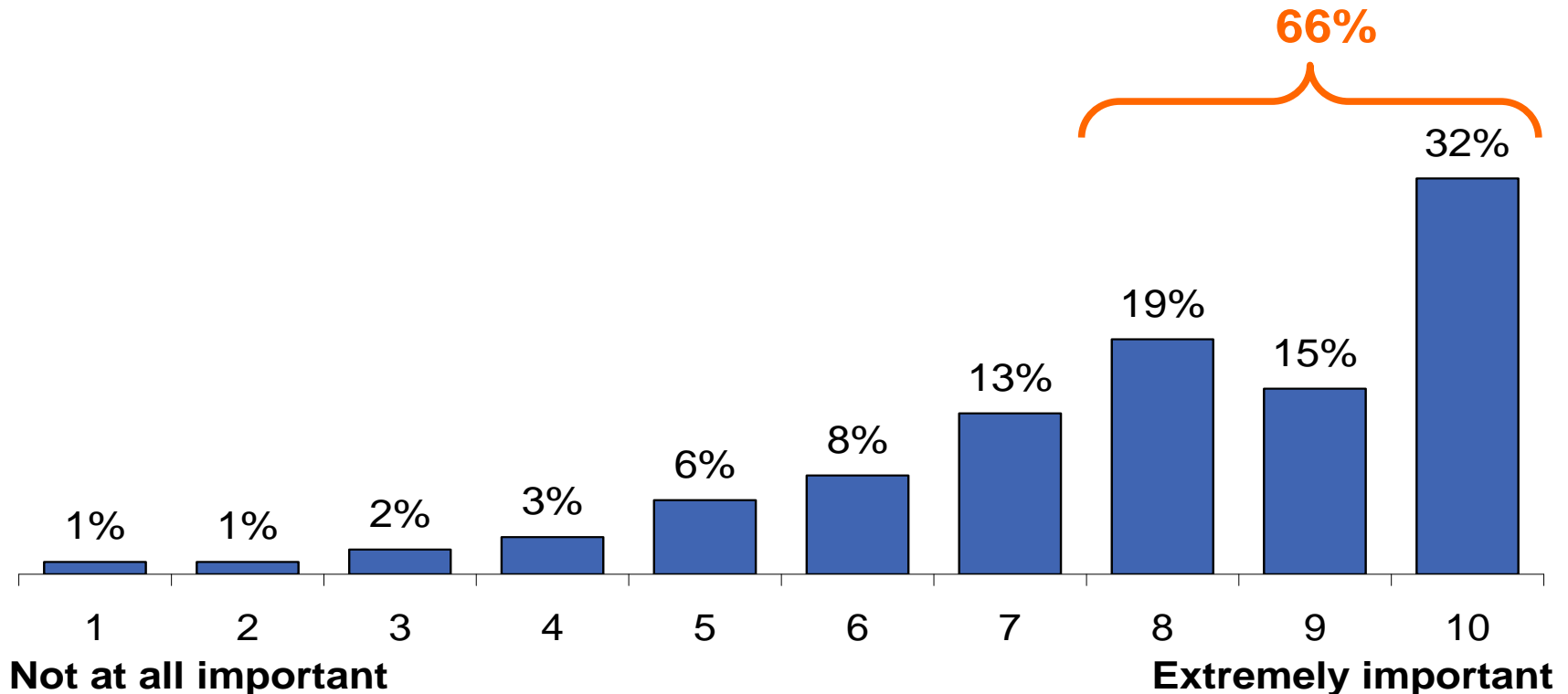
How Would You Grade the Overall Performance of the U.S. Health Care System?



Unfavorable report card grades are more likely among Gen X and Boomers (4 in 10) than among Gen Y and Seniors (3 in 10)

2 in 3 consumers say health care will be important in the new administration

Given All the Issues the New President Will Face, How Important Will Health Care Be During His First Term?



Deloitte's 2009 Survey of Health Care Consumers

Reforms that increase access to primary care, prescription drugs and insurance are widely supported

Reform	U.S.	
	<i>Favor</i>	<i>Oppose</i>
Improve health insurance / care for military	77%	5%
Expand teaching programs in U.S. schools of medicine to increase the supply of PCPs	74%	5%
Establish special court system to address medical malpractice issues	54%	12%
Require every employer to provide health insurance for their employees	53%	17%
Pass state laws to allow consumers to purchase drugs directly from Canada	49%	15%
Increased federal funding for mental / behavioral health services	49%	17%
Allow nurses to diagnose problems and administer care for uncomplicated conditions	47%	21%
Increase government funding and incentives to support adoption of EMRs by providers / plans	41%	21%
Allow FDA to compile information about individuals who take Rx medications to monitor	41%	24%

Reforms that suggest increased federal oversight or changes from the “traditional” view of the system; mandates (except for employer) are a concern

Reform	U.S.	
	<i>Favor</i>	<i>Oppose</i>
Pay doctors and hospitals based on clinical results and outcomes rather than number of patients served or services provided	39%	21%
Require holistic and non-traditional methods of care to be taught in U.S. medical schools	38%	20%
Require every American to have health insurance via purchase / employer / government	37%	25%
Establish national program that provides financial incentives for doctors who follow scientifically-proven approaches to treatment	33%	23%
Assign every American to a PCP who will assist in coordinating care and referring to specialty	27%	38%
Have federal government assume responsibility for and control over Medicaid	26%	31%
Increase taxes to help provide health insurance coverage for the uninsured	25%	43%

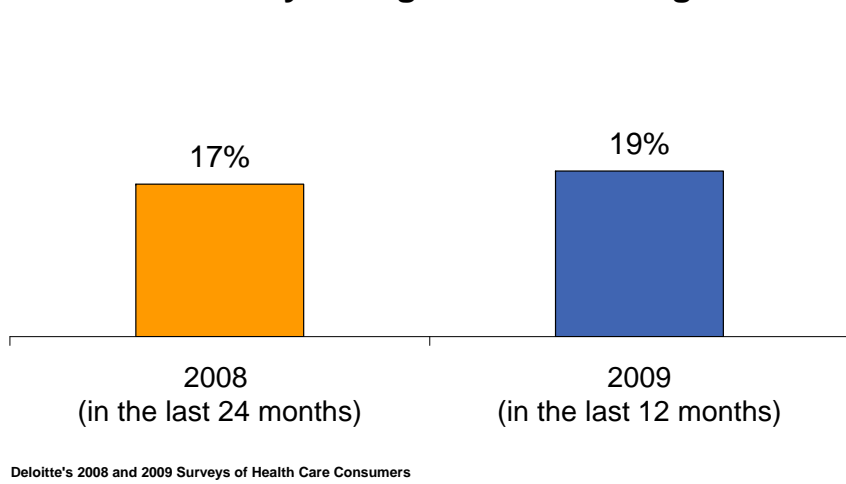
Context:

*The system isn't working well for me
I am worried about costs
I don't like the hassles
But it's too confusing for me to know
what to do.*

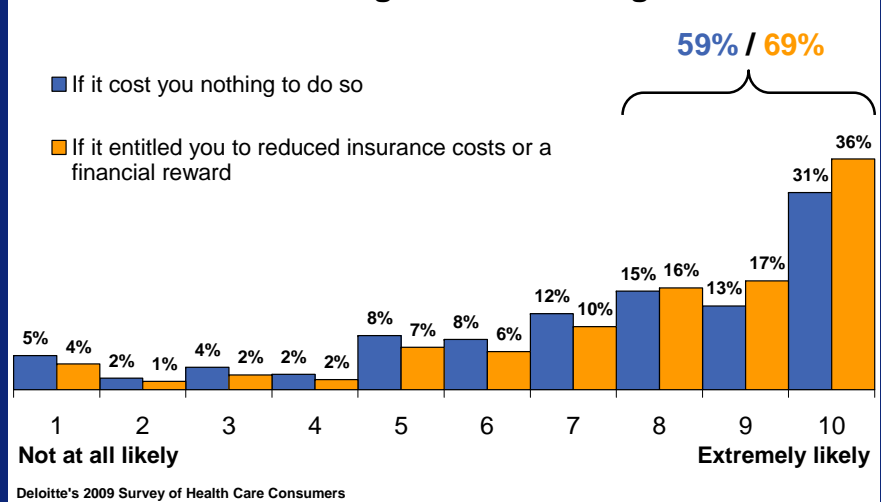
*What do consumers want and need in
caring for themselves?*

1 in 5 participated in a wellness program last year (up from 2008); more than half say they would if given a financial incentive

Percentage Who Reported Participating in a Healthy Living / Wellness Program



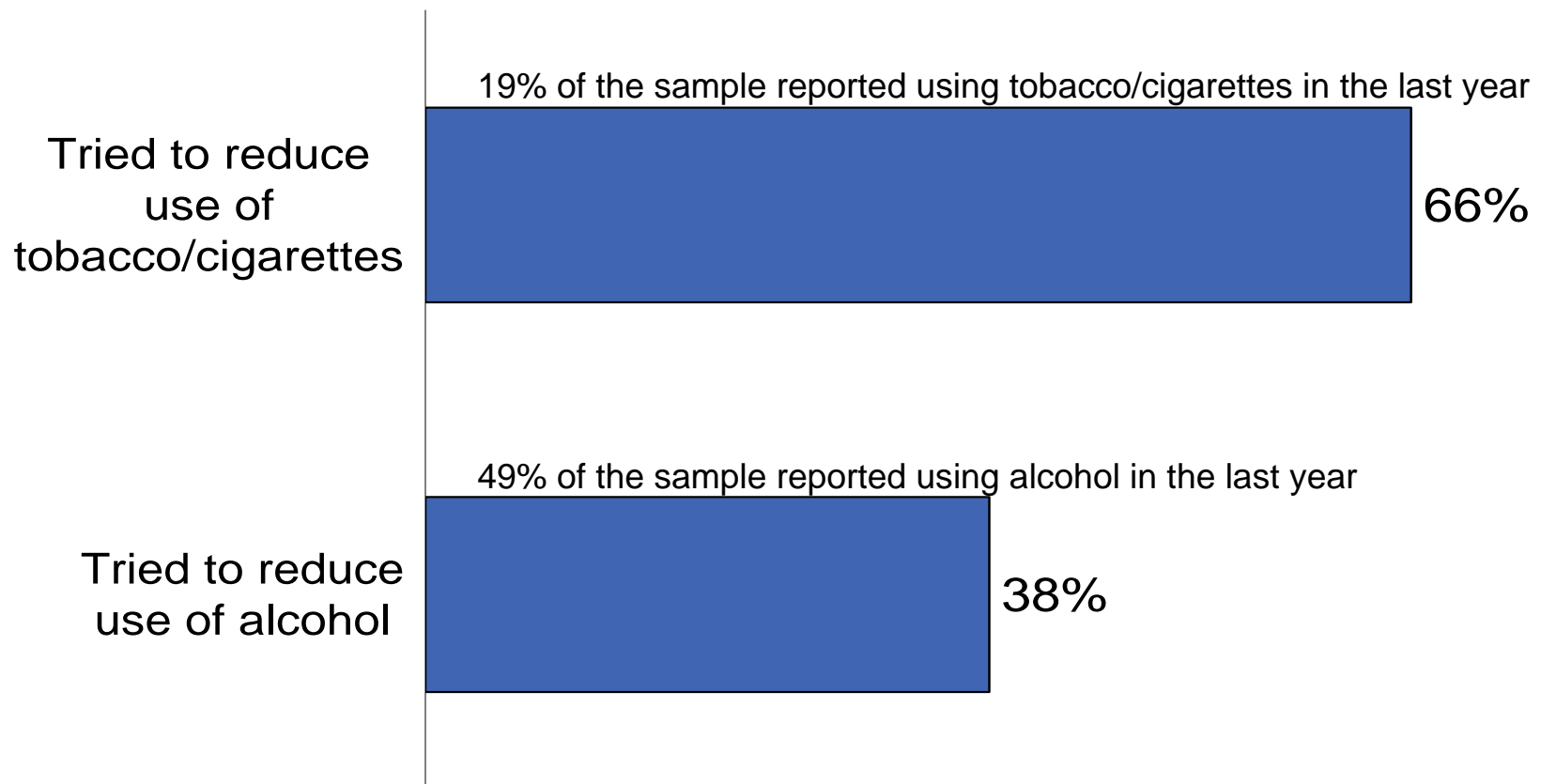
How Likely Would You Be To Participate in a Health Living / Wellness Program?



- Participation is higher among consumers with employer-based insurance (23%) and lower among the uninsured (8%) and consumers with individual plans (9%)
- Seniors (15%) and Gen Y (17%) are less likely than Boomers (20%) and Gen X (20%) to report participating in wellness programs
- Current participation rates are similar between consumers who have one or more chronic conditions (18%) vs. those who do not (20%), but interest in doing so (if it cost nothing) is higher among those with chronic conditions (62% vs. 56%)

2 in 3 smokers tried to stop in the last year; 1 of 3 alcohol users tried to reduce consumption

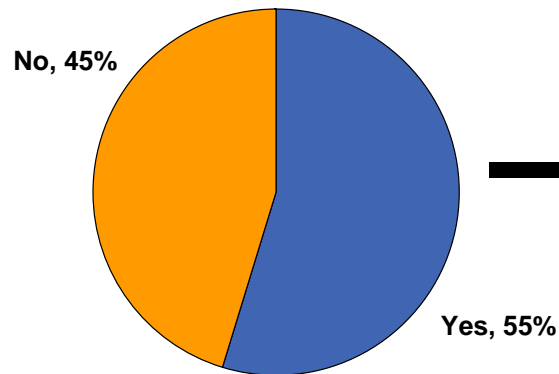
Percentage of Users Who Tried to Reduce Their Use of Alcohol or Tobacco in the Last 12 months



Deloitte's 2009 Survey of Health Care Consumers

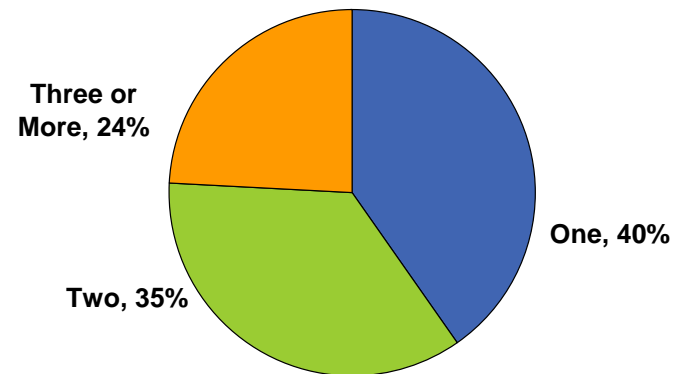
55% have been diagnosed with one or more chronic conditions: 1 in 4 of these with 3 or more

Have You Been Diagnosed By A Doctor as Having One or More Chronic Conditions?



Deloitte's 2009 Survey of Health Care Consumers

How Many Chronic Conditions Do You Have?

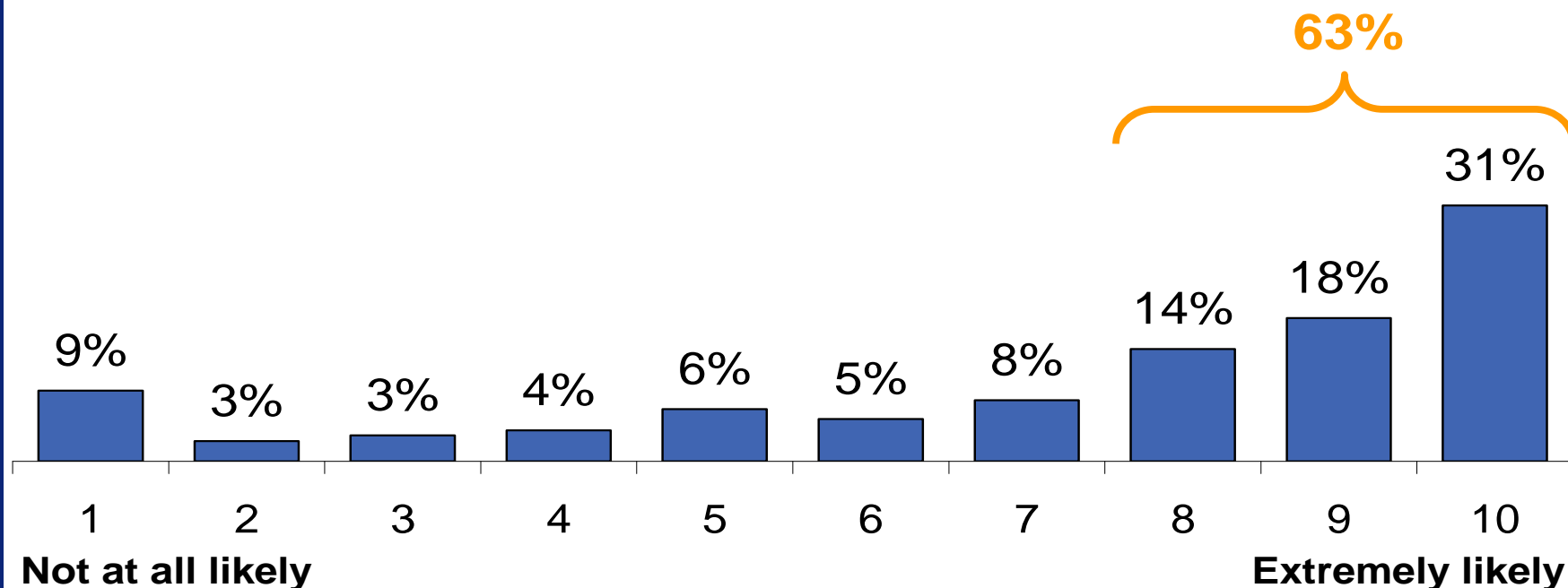


Deloitte's 2009 Survey of Health Care Consumers

n = 2,192 respondents with one or more chronic conditions

3 of 5 say financial penalties would increase their adherence to their chronic treatment regimen

How Likely Would You Be To Comply With the Treatment Regimen Recommended by Your Doctor If You Would Be Required to Pay Higher Insurance Costs Otherwise?

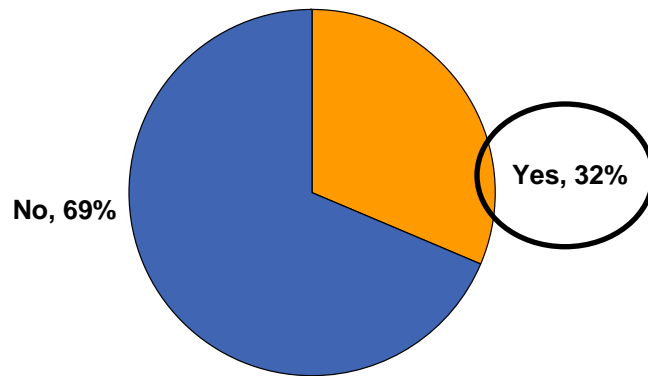


Deloitte's 2009 Survey of Health Care Consumers

n = 2,192 respondents with one or more chronic conditions

Consumers are willing to participate in chronic care management programs without financial incentives

Do You Currently Participate in a Health / Disease Management Program?

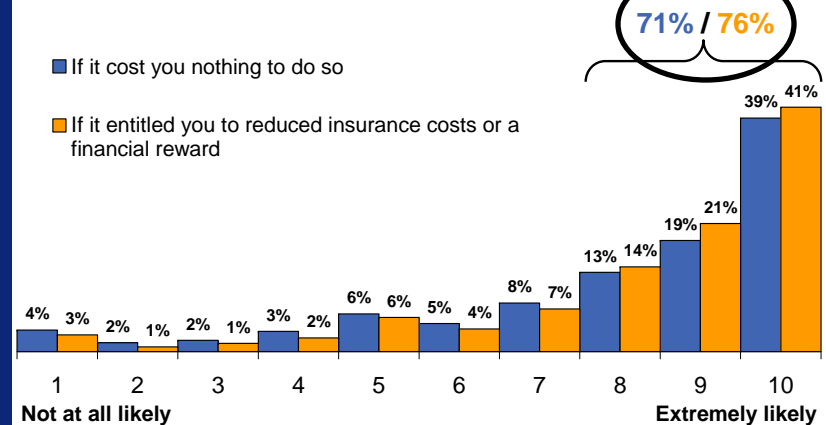


Deloitte's 2009 Survey of Health Care Consumers

n = 2,192 respondents with one or more chronic conditions

- Participation is higher among Medicaid enrollees (43%) and dual eligibles (49%), but very low among the uninsured (13%)
- Boomers and Seniors report higher participation rates (35% and 24%) than Gen Y and Gen X (26% each)

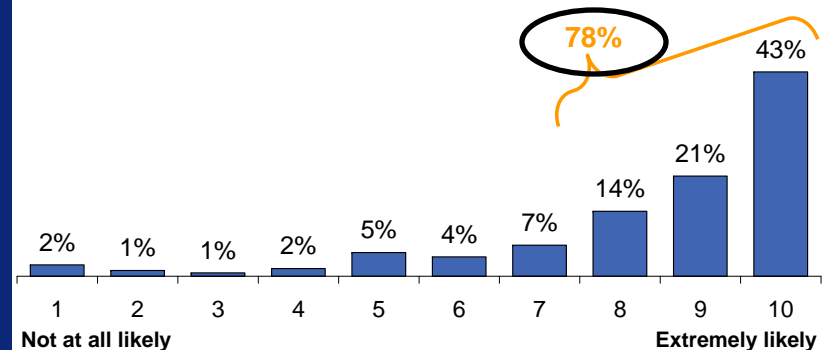
How Likely Would You Be To Participate in a Health / Disease Management Program?



Deloitte's 2009 Survey of Health Care

n = 2,192 respondents with one or more chronic conditions

How Likely Would You Be To Agree to See a Nurse Practitioner or Doctor on a Regular Basis if It Entitled You to Reduced Insurance Costs or a Financial Reward?

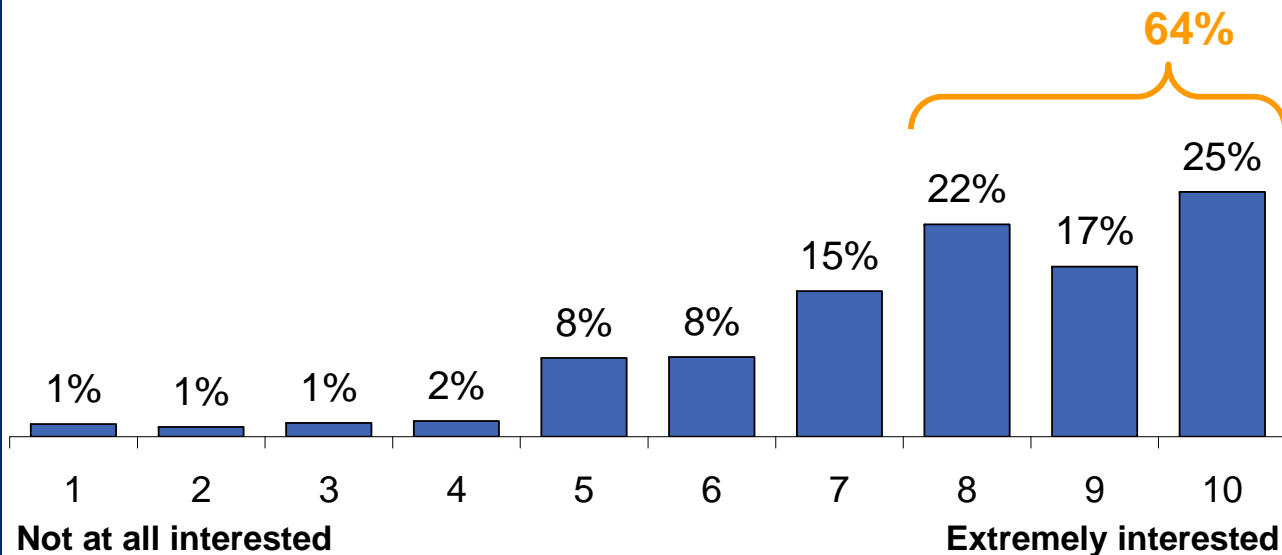


Deloitte's 2009 Survey of Health Care Consumers

n = 2,192 respondents with one or more chronic conditions

Interest in home monitoring technologies to improve health status or manage a condition is high

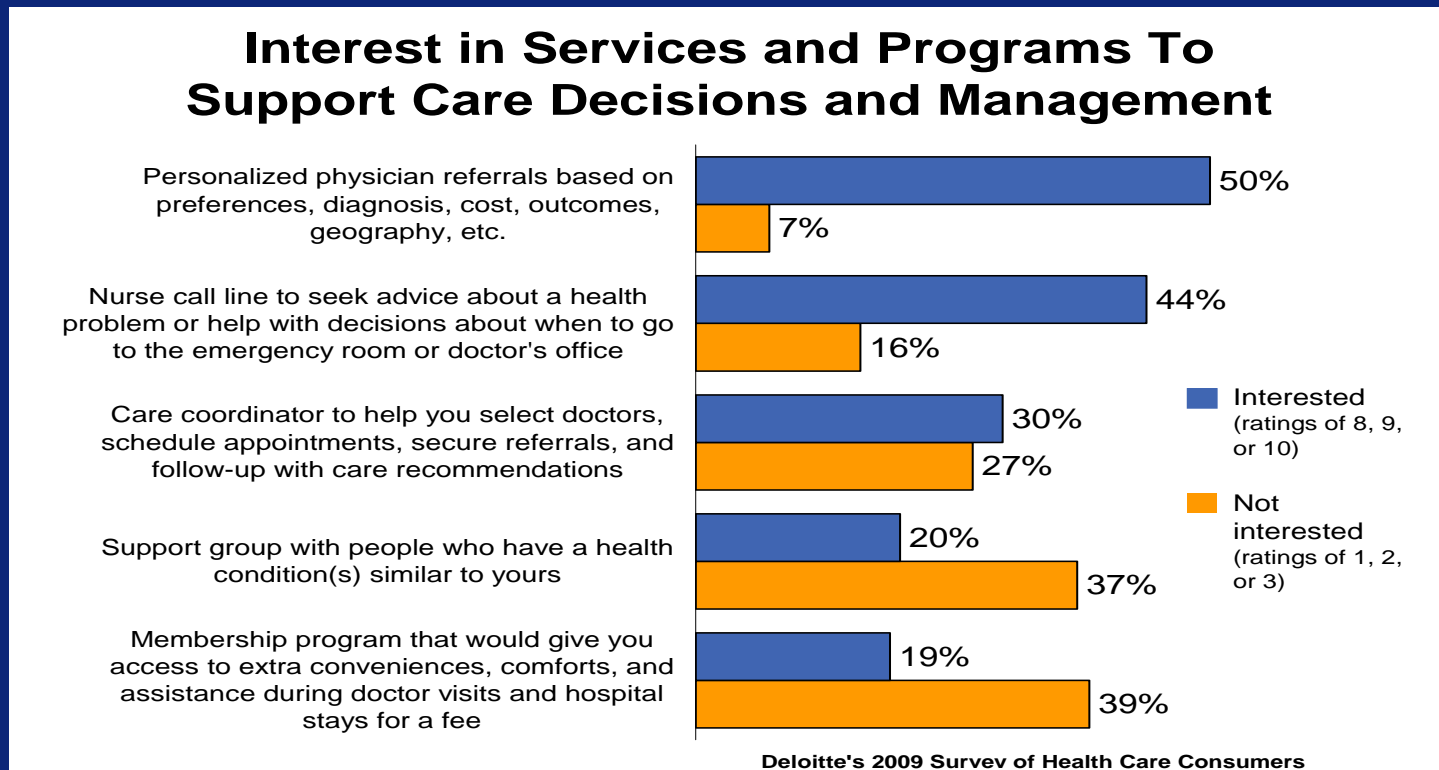
How Interested Would You Be in Using an In-Home Medical Device That Could Help You Know What You Needed to Do, and When, to Improve Your Health or Treat a Health Condition?



Deloitte's 2009 Survey of Health Care Consumers

Interest ranges from 51% in the youngest generation (Gen Y) to 76% in the oldest generation (Seniors)

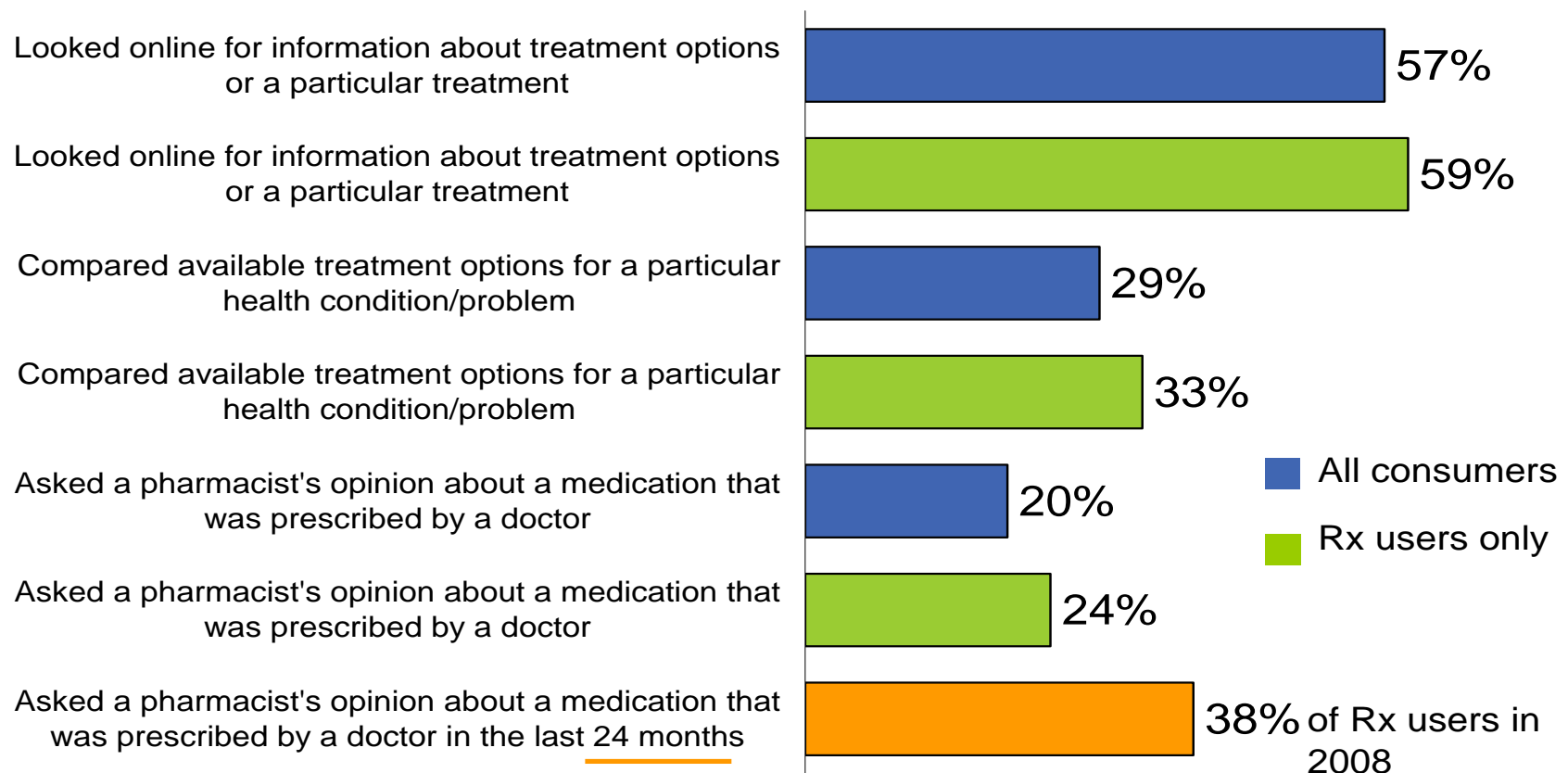
Consumers want assistance in dealing with their health problems: coaching from their physician and nurses is optimal: only 1 of 5 sees value in support groups or alternative coordination roles



- Interest in these services and programs is especially high among Medicaid enrollees compared to the other insurance groups
- Consumers with one or more chronic conditions tend to be more interested in these services than consumers who have no chronic conditions

For information about treatment options, nearly 6 in 10 sought information online in the last year

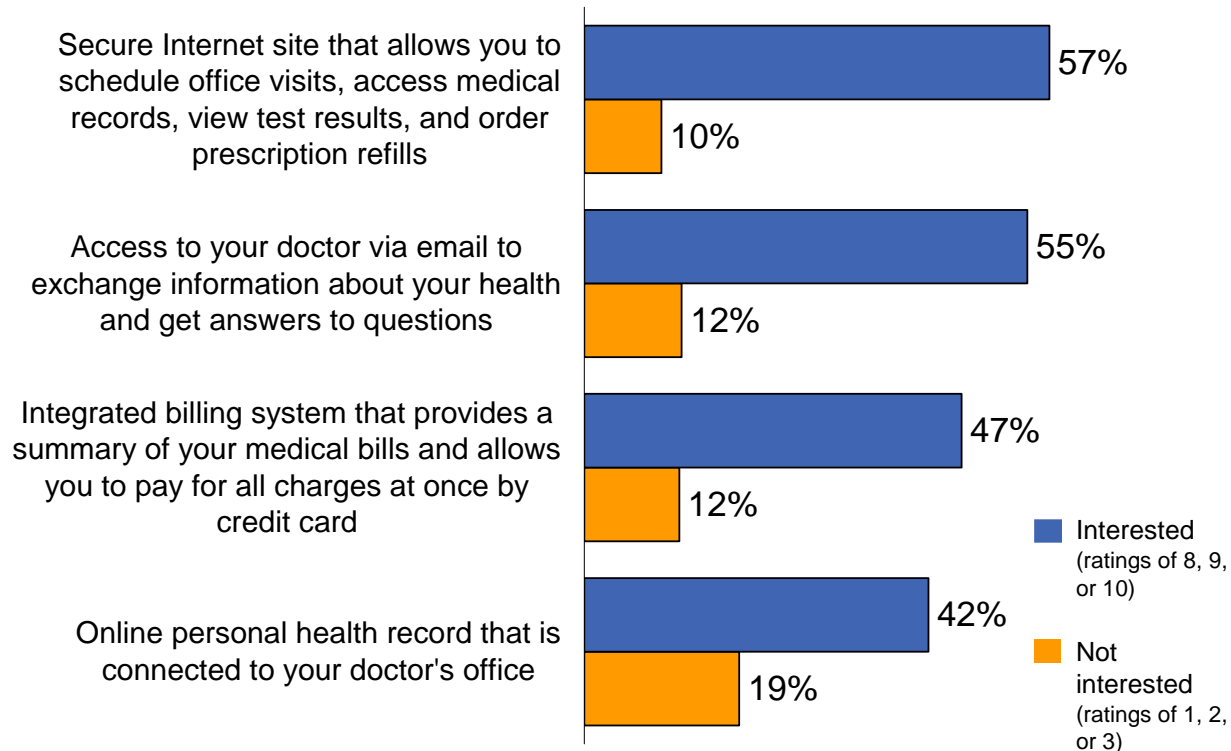
Percentage Who Sought Information About Treatment Options in the Last 12 Months



Deloitte's 2008 and 2009 Surveys of Health Care Consumers

The majority express interest in using “secure” online tools to manage their interactions with medical professionals and health plans

Interest in Online Tools & Services



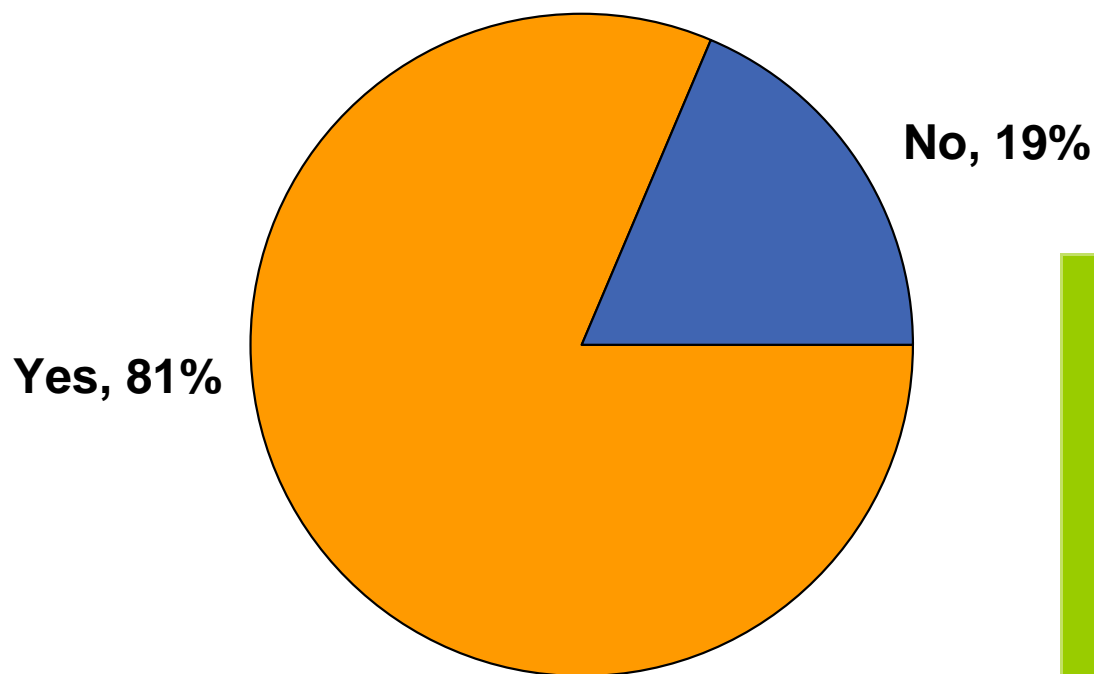
Deloitte's 2009 Survey of Health Care Consumers

Consumers in Medicare and Medicaid, as well as the uninsured, are just as interested in these tools and services as commercial enrollees

- Interest varies among age cohorts (e.g., 51% of Seniors and 52% of Gen Y are interested in access to a secure Internet site vs. 60% of Gen X and 61% of Boomers)
- Consumers who have sought care recently for a chronic condition expressed greater interest in using these services than consumers who have not (e.g., 65% vs. 53% are interested in access to a secure Internet site)

8 of 10 report having a primary care provider

Do You Currently Have a Doctor, Nurse Practitioner, or Other Health Care Professional You Consider to Be Your Primary Care Provider?

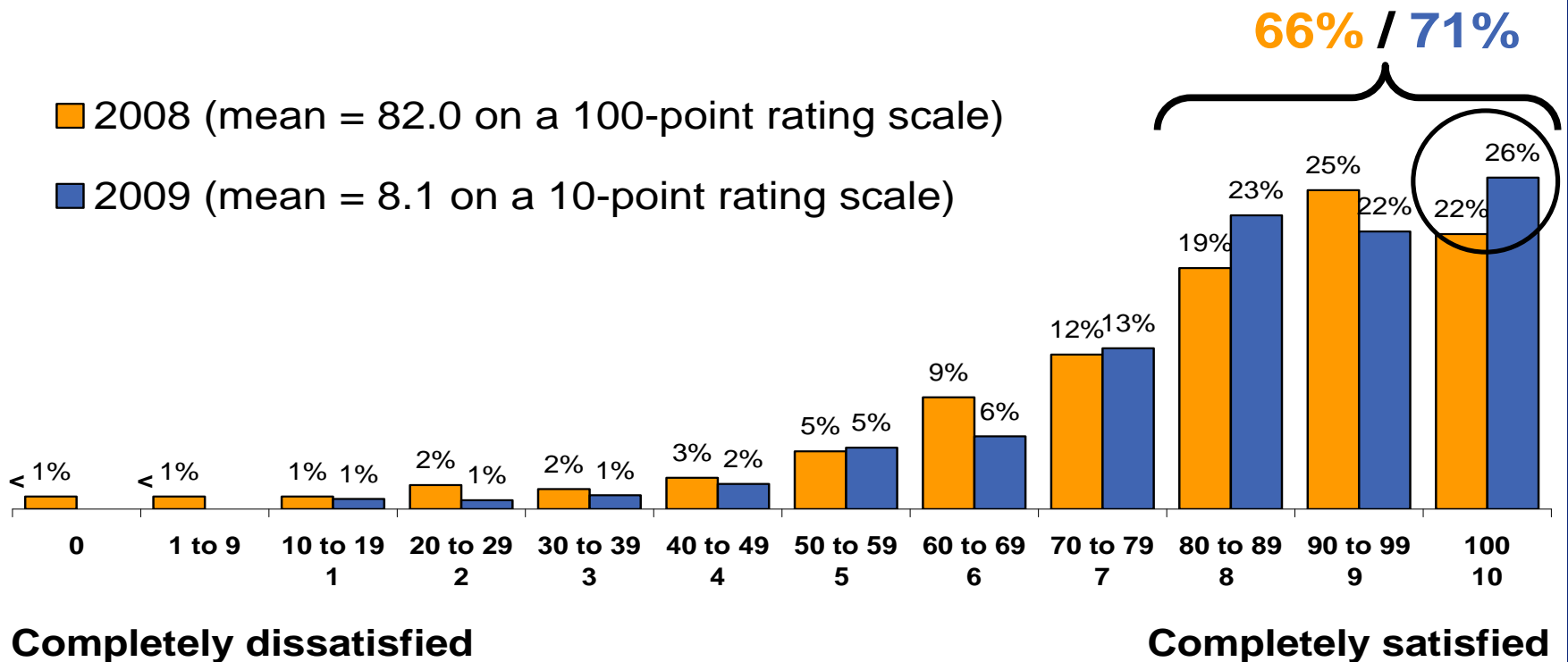


Consumers with one or more chronic conditions are more likely to have a PCP (89%) than consumers with no chronic conditions (72%)

Deloitte's 2009 Survey of Health Care Consumers

71% of these relationships are satisfactory to consumers

Change in Satisfaction With the Care Received From Primary Care Provider

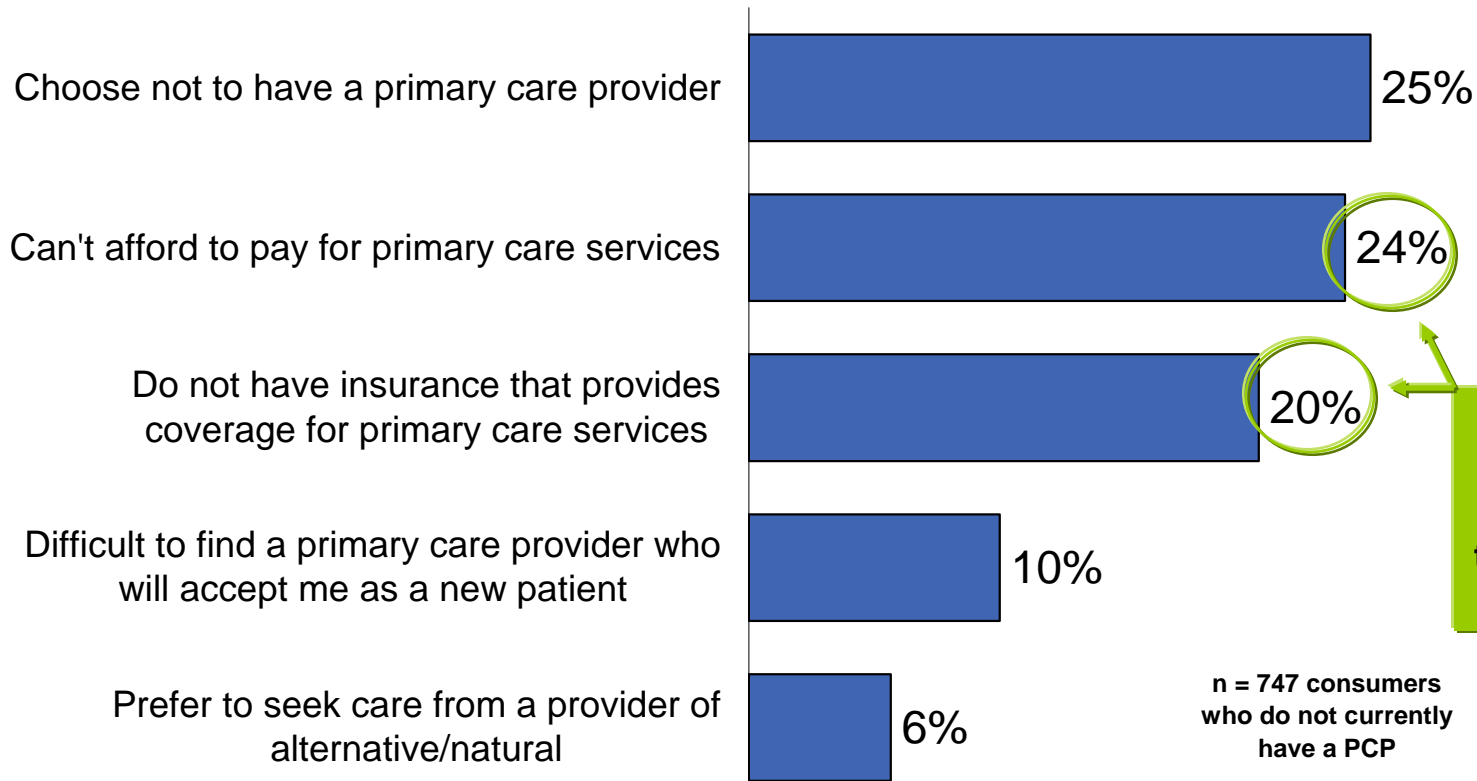


Deloitte's 2008 and 2009 Surveys of Health Care Consumers

n = 2,497 in 2008, and 3,254 in 2009, with a primary care provider

Among the 19% who do not currently have a PCP, 1 in 3 cited costs or insurance coverage as reasons

What Keeps You From Having a Primary Care Provider?



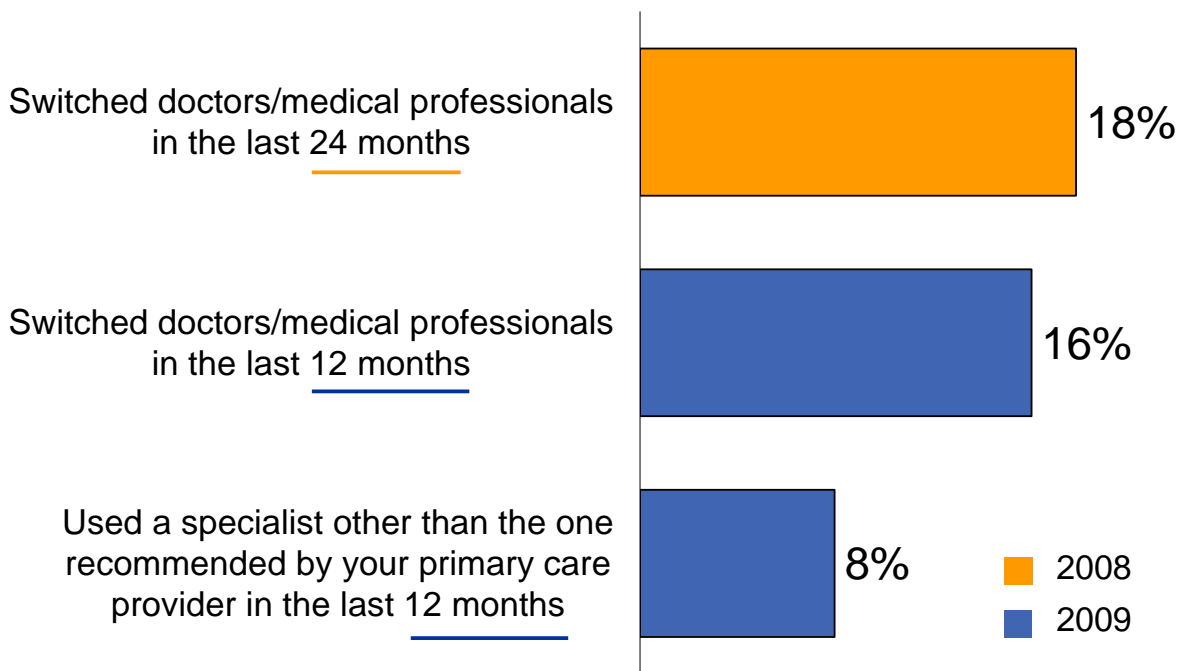
33% cited one or both of these cost reasons

n = 747 consumers who do not currently have a PCP

Deloitte's 2009 Survey of Health Care Consumers

16% changed physicians in the previous 12 months; 8% used a specialist other than one referred by their physician

Percentage Who Switched Doctors

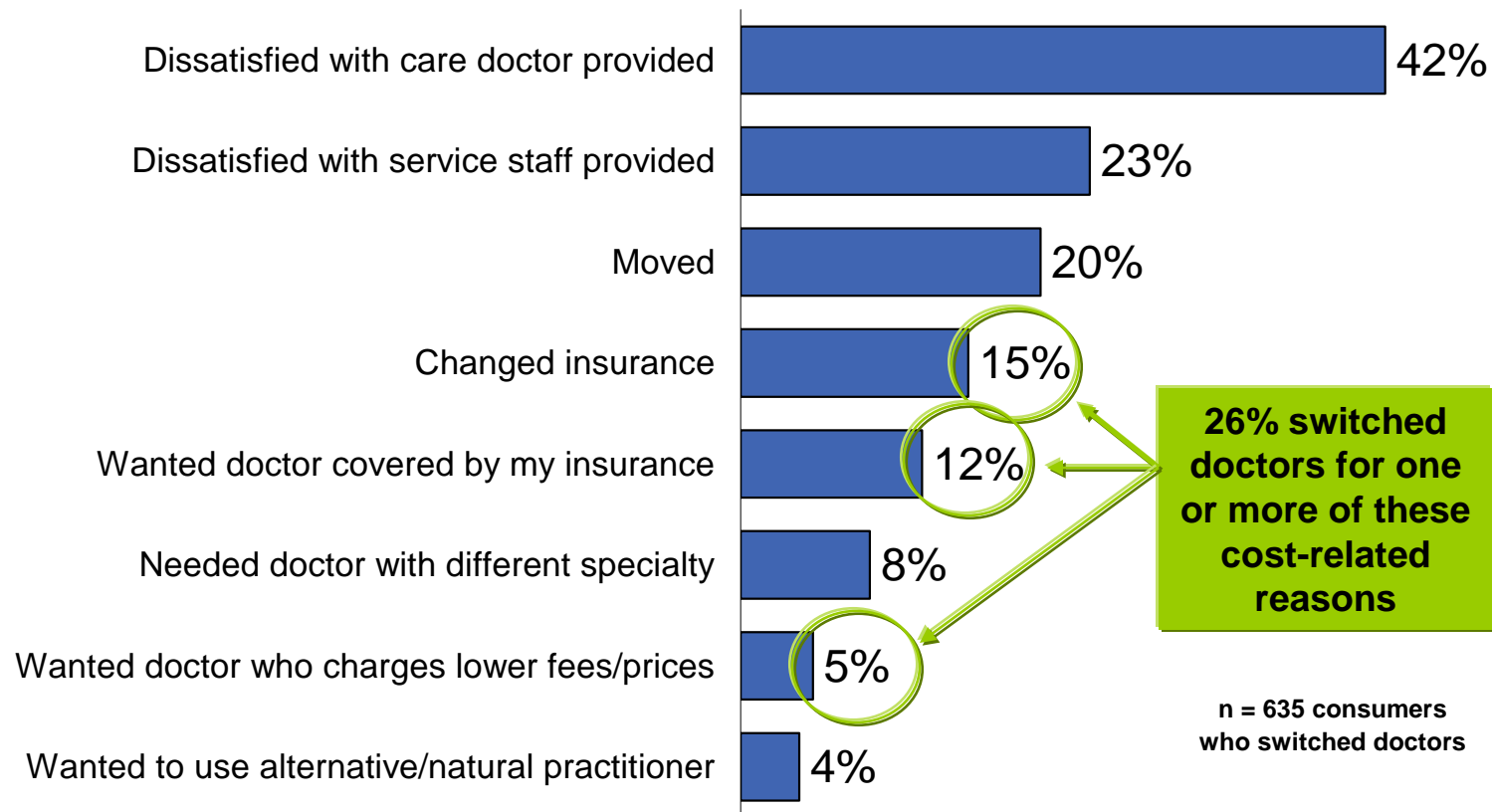


Deloitte's 2008 and 2009 Surveys of Health Care Consumers

The tendency to switch declines with age, ranging from a high of 22% among Gen Y to a low of 11% among Seniors; switching was higher among consumers who sought care for a chronic condition (22%) than among those who didn't (13%)

Poor service & dissatisfaction with the physician were reasons for changing physicians in 2 of 3 cases; cost was the reason for 1 in 4

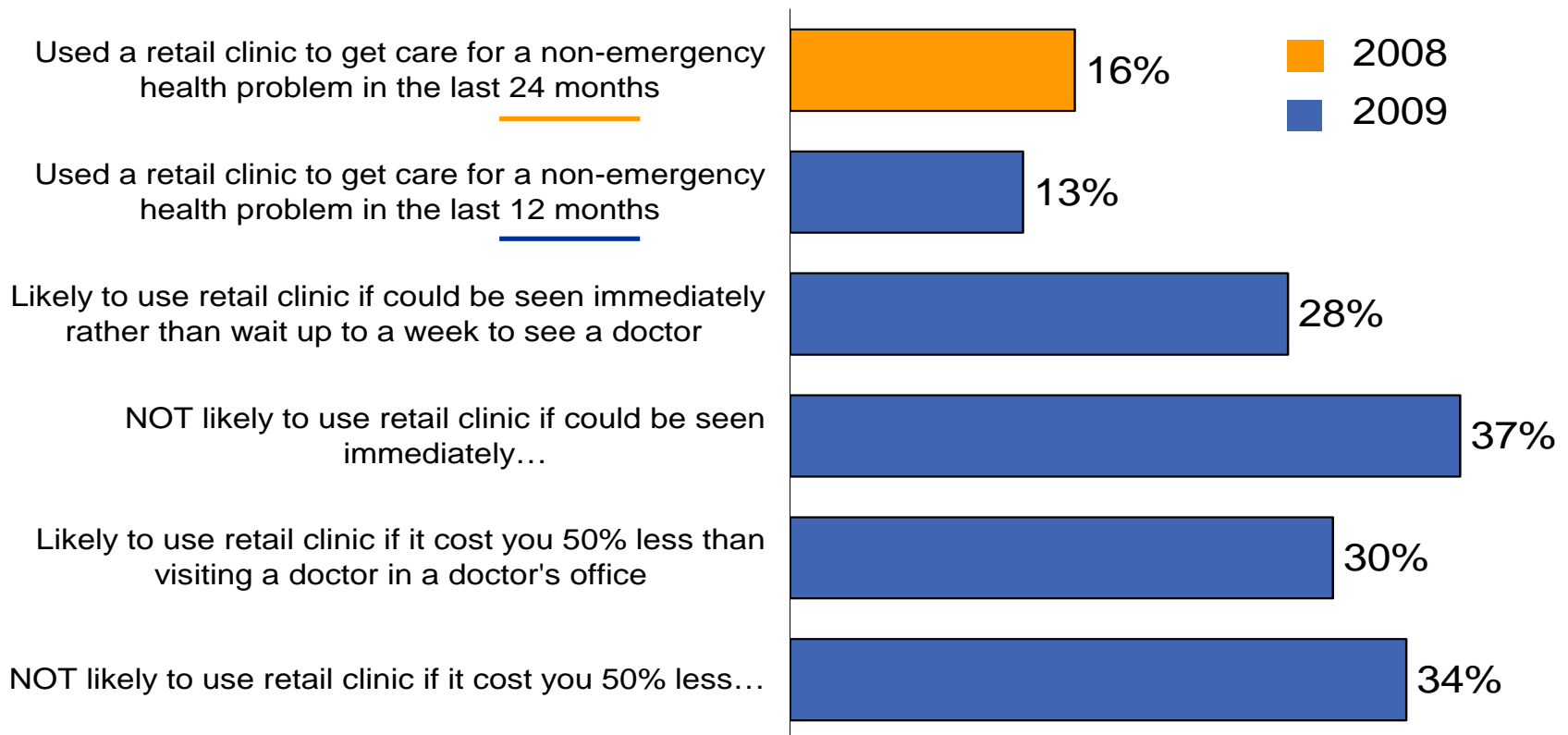
Reasons Consumers Switched Doctors in the Last 12 Months



Deloitte's 2009 Survey of Health Care Consumers

In the past 12 months, 13% reported they used a retail clinic—an increase from 2008; use is driven by convenience and cost

Percentage Who Reported Using a Retail Clinic and Likelihood of Use

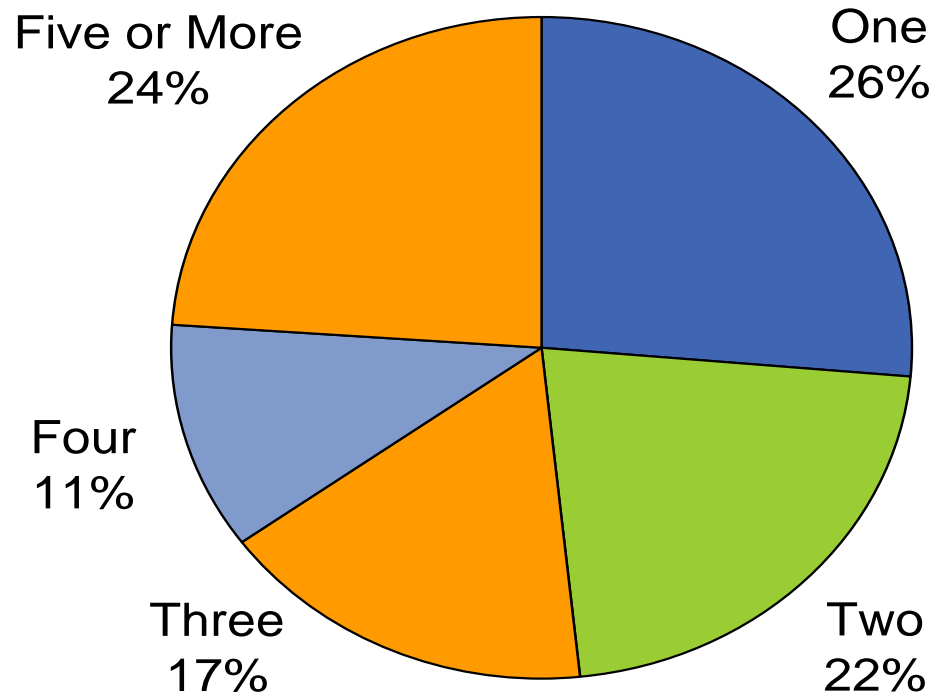


NOTE: "Likely" = % who gave rating of 8, 9, or 10 while "Not likely" = % who gave rating of 1, 2, or 3 on a 10-point scale

Deloitte's 2008 and 2009 Surveys of Health Care Consumers

Of the 57% who take prescription medications, more than half take 3 or more

How Many Prescription Medications Do You Currently Take?



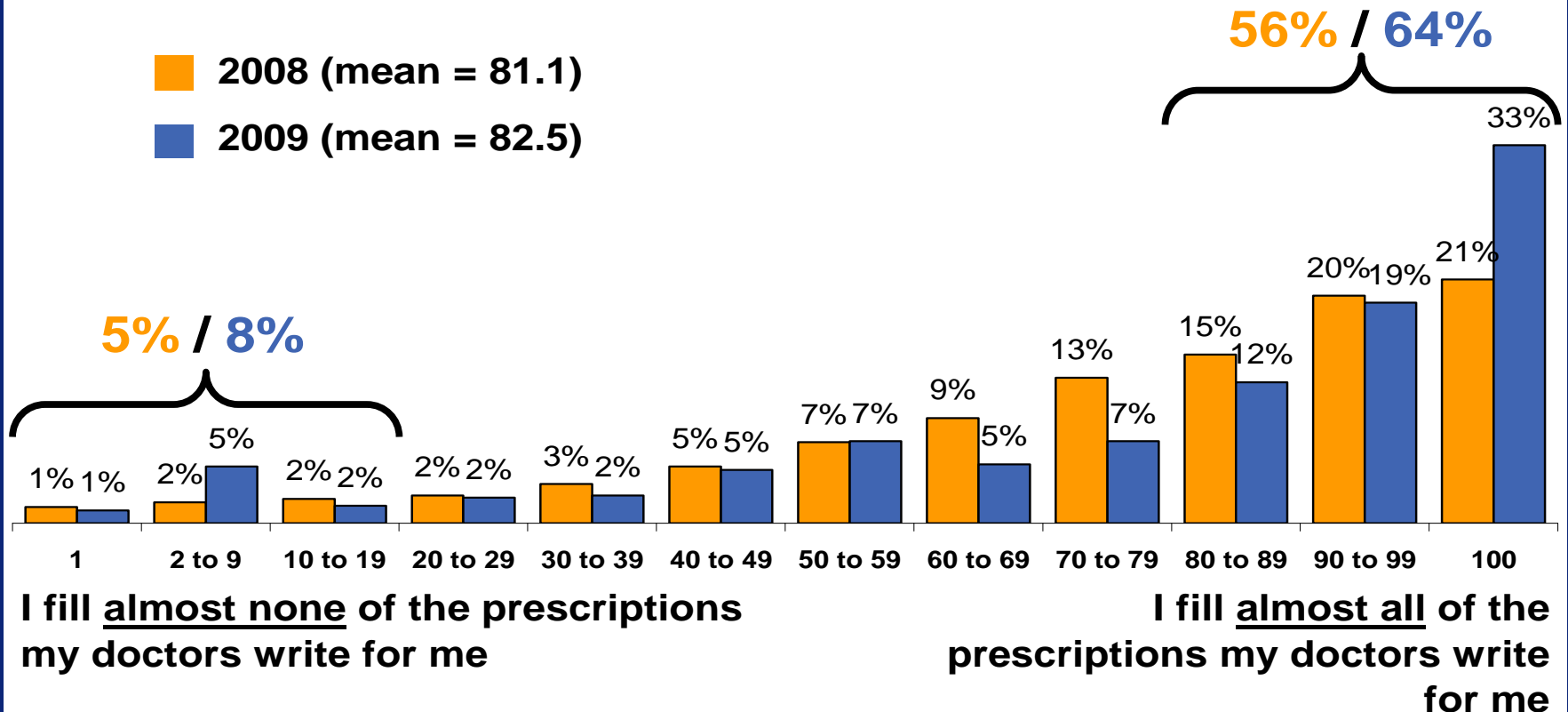
Deloitte's 2009 Survey of Health Care Consumers

n = 2,294 who currently take prescription medications

6 in 10 say they almost always fill their prescriptions: Rx fulfillment is lowest among the uninsured and Gen Y, highest among seniors and consumers with chronic conditions

Percentage Who Fill Their Prescriptions

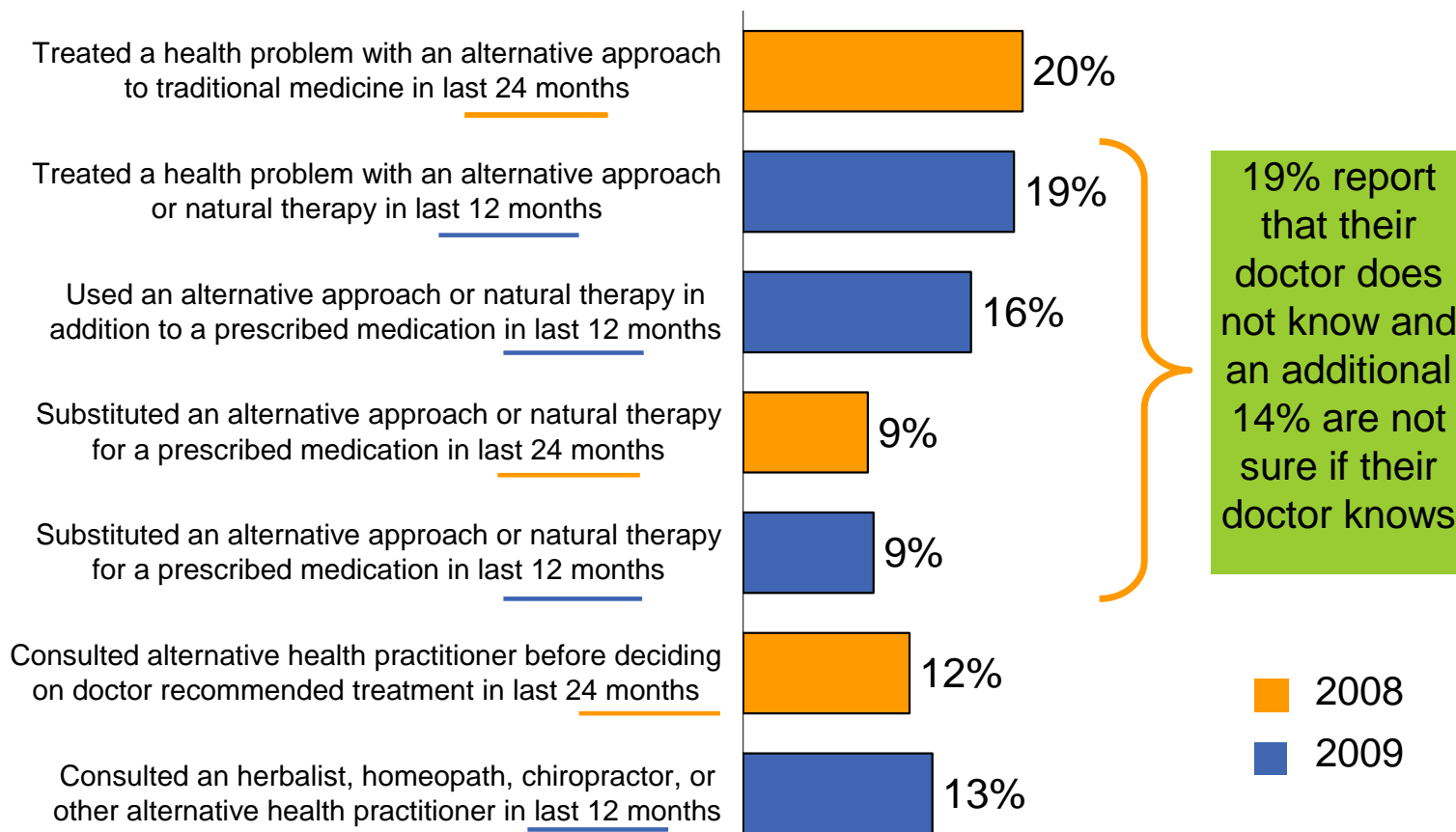
■ 2008 (mean = 81.1)
■ 2009 (mean = 82.5)



Deloitte's 2008 and 2009 Surveys of Health Care Consumers

1 in 5 consumers used an alternative or natural therapy to treat a health problem in the past year—use of non-traditional therapies increased in the past year

Percentage Who Reported Using an Alternative to Traditional Medicine



Deloitte's 2008 and 2009 Surveys of Health Care Consumers

Guided self care management:

*I want help: I know what I need to do
but...*

*I like online tools and coaching
My PCP isn't helping as much as I need*

The Big Takeaways

The opportunity for technology-enabled Guided self-care management services is Significant and growing, but current models do not accommodate “my wants and needs”

The consumer market is complex: approaches to guided self-care management require sophisticated targeting and change management.

The 2009 Survey of US Health
Consumers will be released
March 17, 2009.

The full report will be available at no cost at
www.deloitte.com/centerforhealthsolutions

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