



What matters *most* to the health care consumer?

Insights for health care providers from the
Deloitte 2016 Consumer Priorities in
Health Care Survey

Gaining an understanding of what drives the choice-making for health care consumers is complex. The journey is complicated and multi-tiered, and differs greatly from the consumer experience in other industries. But as the health care industry continues to shift from volume to value, and as consumers take a more active role in managing their health care, the need to understand what matters most to them grows.

In Deloitte's 2016 Consumer Priorities in Health Care Survey, we explored a number of interactions consumers face throughout their health care experiences. Their expectations in these health care interactions are being shaped by the customized and convenient experiences they have grown accustomed to in other industries, like retail and banking. As a result, they are demanding greater personalization; transparency in network coverage, medical prices, and bills; convenience; and more engaging digital experiences and capabilities. From doctor's appointments to lab visits and even hospitalizations, consumers seek high quality service tailored to their specific needs from health care providers and administrative staff.

As technology advances in other areas, consumers expect the same of health care. If they can book a flight from their mobile device, why not a doctor's appointment? Increased convenience could be facilitated at the point of patients' self-research, scheduling, intake, and the discussion and scheduling of follow-on treatment needs. While this process remains largely manual today, despite significant investment in health IT, expanding the digital connection to providers could enhance convenience and personalization for the health care consumer.

The engaged health care consumer is proactive about their care management and cost considerations, and takes the time to understand larger aspects of the health care ecosystem that pertain to them. Therefore, consumers are increasingly expecting more out of the services they receive from their providers.

In response, players across the health care ecosystem are developing strategies to better meet the demands of the engaged consumer. Providers are working more collaboratively with health plans, technology companies, pharmacies, retailers, and device makers to streamline processes. While digital tools are not yet the highest priority or concern of health care consumers, as evidenced in recent Deloitte studies, their usage will be vital to the future of consumerism.

As part of a comprehensive study of the engaged health care consumer, Deloitte has developed and applied a number of tools to determine not just what consumers want or prefer, but how they prioritize their health care choices. Every day, consumers make tough decisions on how to manage their health care. Spending money and time—often in limited supply—on health care services

puts consumers in the position of making difficult choices. Our evaluative efforts through several consumer surveys conducted over the past year, as well as leadership panels and focus groups, are critical to comprehending how consumers put preferences and interests into action.

Our objectives

The health care consumer landscape is changing. Engaged consumers desire greater levels of self-service, access to information, greater choice, and real-time interactions. The system is responding with new capabilities and tools to assist consumers, increasing collaboration across the ecosystem and simplifying communications and support.

To meaningfully explore what makes the health care consumer tick, we began with a series of fundamental questions:

- How is the engaged consumer defined?
- How are their attitudes and preferences measured?
- How do their preferences vary?
- What do they prefer the most?
- How do their "likes" and "wants" translate into actual transactional decisions?
- What are the implications for provider organizations?

We reviewed previous Deloitte surveys and reports as well as other evidence from the marketplace, and determined a critical question needed to be answered: "What is most important to health care consumers?" This is in contrast to an approach that assesses what people think individually about aspects of health care. In these surveys, consumers are more likely to rate most elements of health care as highly important, without thinking about priorities, trade-offs, and making the tough decisions on care and cost. By focusing on the interactions in consumers' overall health care experience, we can begin to develop a more complete understanding of how consumers want to use the health care system, and better identify the trade-off choices they are willing to make.

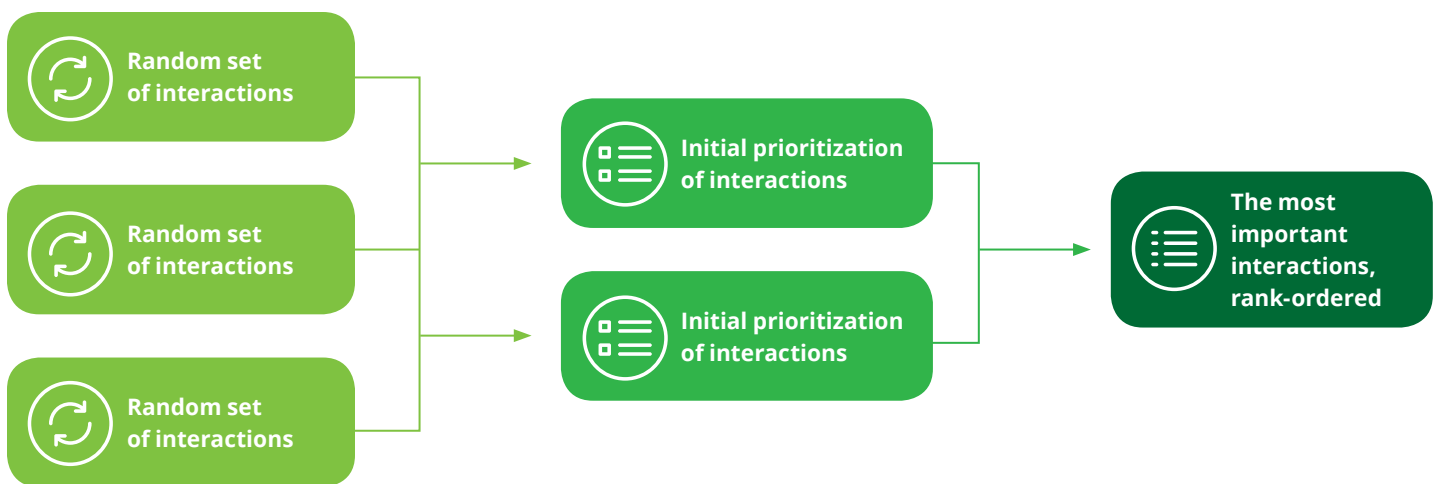
Our methods

The Deloitte 2016 Consumer Priorities in Health Care Survey was conducted in April 2016. We used a "bracket" method akin to

those used in sports tournament structures. It pitted 64 random sets of statements about consumers’ interactions with the health care ecosystem against one another (see Figure 1). It put our respondents on the spot by asking them to make specific choices about the various aspects of the health care system that they valued the most. Previously, Deloitte conducted a focus group to investigate consumer behaviors that they may value most, and to capture interactions with the health care system in the voice of the consumer. These responses informed the set of 64 interactions with providers (and health plans) that we further explored using an online survey. We surveyed a nationally representative sample of 1,787

consumers, but also had a focus on specific demographic cohorts, such as senior and Hispanic consumers, to more fully understand how certain groups view their overall health care experience. To provide a more comprehensive assessment of today’s health care consumer and the impact on the provider space, we supplemented the 2016 Consumer Priorities in Health Care Survey with other targeted Deloitte studies over the past year, including the Survey of US Health Care Consumers ¹, American Pantry Study ², Mobile Consumer Survey ³, and Millennial Survey ⁴. We also consulted third-party databases and the findings of our own focus group on health care consumerism.

Figure 1. Respondents were asked to select health care interactions that were most important to them in building a positive consumer experience, and those that were least important.



Our findings

The Deloitte 2016 Consumer Priorities in Health Care Survey brackets revealed a series of top-tier priorities expressed by consumers with regards to their providers:

Consumers want to be known and understood in order to get a personalized health care experience; providers are in the best position to deliver it.

According to Deloitte’s Survey of US Health Care Consumers, 75 percent of consumers seek a partnership with their providers to determine the most effective treatment decisions. And 1 in 3 consumers wants their provider to push them to be more active in researching and questioning their prescribed treatments ⁵.

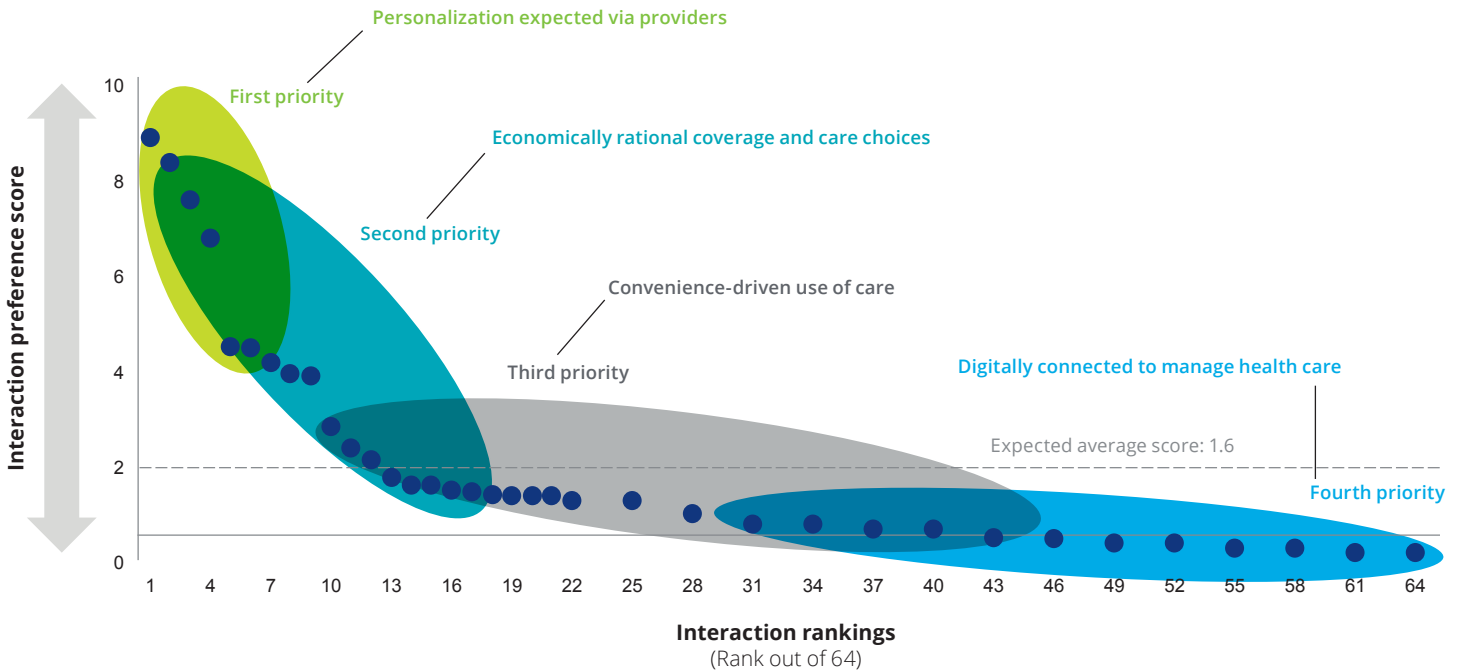
We found that the number one preferred interaction is having a doctor or other health care provider spend sufficient time with the patient and not rushing through exams.

Relationships with providers can be complex, often emotionally charged, and become increasingly crucial over time as older patients often find themselves with increased face-to-face care and support needs. The most attuned providers can steer consumers effectively by focusing on the element of human touch. Bedside manner, our survey respondents make clear, truly matters. Such personalized care isn’t limited to seniors; millennials also cite this as a key consideration.

As a result, providers should rethink the conventional “four walls” consumer experience design for their primary institution – doctor’s office, hospital, pharmacy, home care giver, etc. Leading providers will create new seats at the table when developing their strategy to better involve or create consumer experience stakeholders from all critical moments of the consumers’ health care experience. And they will strive to create personalized experiences where past interactions are known, and future needs are anticipated.

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Figure 2. Rankings across the general population of consumers



Source: Deloitte 2016 Consumer Priorities in Health Care Survey

Note: Only every third point from Interaction Ranking #22 onwards is shown. Not all 64 interactions are directly aligned to one of the four clusters; clustering is based on subjective grouping of similar items.

Consumers want economically manageable care choices.

The Deloitte Center for Health Solutions 2015 Survey of US Health Care Consumers found that more consumers are seeking greater transparency in their health care costs. Nearly 3 in 5 surveyed consumers reported wanting providers to supply cost information, but less than 1 in 5 reported asking about pricing before agreeing to a treatment ⁶.

Our survey expanded on that area of discussion. For example, consumers ranked "having all doctors and medications in-network and covered" as the second most important health care interaction among the 64 interactions that we explored.

The upshot? It can enable better cost transparency and lead to the design of care service offerings that deliver value universally, and more affordably, to consumers.

Convenience in accessing care is highly valued; consumers want access when, where, and how it best suits them and increasingly it dictates their behavior in the health care system.

Consumers are busy and health care can easily drop to the bottom of their priority lists. That is especially the case for younger segments of the health care consumer population. So convenience in connecting with providers is valued across certain segments of consumers. Geography also factors into the equation, as do commuting time and distance.

Consumers rank time-saving conveniences highly among the 64 most important health care interactions. They ranked the following interactions tenth and twelfth respectively:

- “Desire for minimal to no wait times in waiting rooms at doctor’s offices, hospitals, laboratories, or other specialized providers for testing.”
- “The availability of appointment for the day and time desired by patients.”

Recent trends support these findings further. Prior Deloitte research found that consumers using more easily accessed care sites are increasing in number, especially when physicians are unavailable, and they want an appointment near them at a time that works for them best ⁷. And this study’s results indicated that 1 in 4 respondents have patronized a retail clinic, and 42 percent have used an urgent care clinic.

However, while these two items could be viewed as an important part of a convenient and time-saving provider experience for consumers, most of the interactions in the convenience cluster fell below the expected survey average. This result suggests that convenience may not be the first thing that consumers clamor for, but rather, they value convenience as a “table stakes” foundational need. And when convenience is not addressed, such as in cases where a consumer issue arises, the need for convenience may become pronounced.

For providers, recognizing the value in market segmentation that identifies distinct needs or drivers of purchase behavior is critical to building strategies that most effectively match convenient options to the right consumers.

Consumers seek digital support to assist in the management of their care, but our studies find that digital tools aren’t always top of mind for consumers.

For digital capabilities to more efficiently drive provider strategies and service offerings, they must become easier to use in order to gain optimal usefulness and traction among health care consumers.

The use of technology to measure and manage health care is growing. A Deloitte report in 2015 that explored utilization of digital applications in health care found that the number of consumers applying technology to their care management had risen from 17 percent to 28 percent from 2013-2015, with millennials far more likely to find digital sources more advantageous ⁸.

But the Deloitte 2016 Consumer Priorities in Health Care Survey results gave lower-than-expected ratings to the importance of access to electronic tools and trackers for fitness or other health care management (62 out of 64). Often, consumers seem least likely to use these tools where they could be needed and valued most, impeding the adoption of resources that could ideally be driving change.

Consumers express interest in the quality, integration, improved operability, and ease of use of digital resources as evidenced by their widespread usage in other industries. But when it comes to health care, activity has not risen to meet interest.

As digital applications tend to be less highly valued across different demographic groups, what does that mean for the provider in terms of developing digital programs? And how does it help deliver the type of personalization and convenience consumers are asking of their providers?

The lagging interest in digital to date does not mean provider organizations should stop their digital spend. But it should generate an evaluation of how digital tools are being used, which tools are regarded as most important and most likely to be used by each segment, and how to design for digital. Scaling technology and designing digital for health consumers must be more than a digitization of current state processes. The future of health care delivery must consider consumers’ specific needs, and purposefully use a human-centered approach, when developing new care models that incorporate digital solutions.

Conclusion

As the industry moves forward in the shift from volume to value and as consumers become more engaged in managing their health, understanding what matters most to them becomes a strategic imperative.

Providers are confronted with many incremental burdens in the evolution of the engaged consumer — from new digital applications such as electronic health records, to the introduction of new billing and administrative systems that add complexity to revenue cycle management, to consumer demand for more quality time with providers. The move towards greater personalization and discussion of costs in the patient-doctor relationship, for instance, are two critical pieces for providers to consider as they work to develop better, and more engaging, consumer experiences. Reaching the proper balance isn't an easy process.

These findings can help shape the development of personalized services, improved access to providers, affordability, and a more thoughtful strategy regarding the use of digital as a channel to facilitate meaningful change in consumers' health care experiences.



Contacts

Let's start the conversation:

Deloitte can help providers improve the consumer end-to-end experience not only during care, but before and after, for increased engagement. Instead of competing with the growing retail health space, traditional providers can bring their strength into it—and secure their place in a new era of personal wellness. These solutions can also accelerate value-based care imperatives. Let's talk about winning in the age of the empowered consumer.

David Betts, MBA

Principal
Deloitte Consulting LLP
dabetts@deloitte.com

Leslie Read

Principal
US Health Plans Consumer &
Digital Transformation Leader
Deloitte Consulting LLP
lread@deloitte.com

Matt Kaye

Senior Manager
US Health Plans Consumer &
Digital Strategy
Deloitte Consulting LLP
mkaye@deloitte.com

Aaron J. Patton

Specialist Leader
Deloitte Consulting LLP
apatton@deloitte.com

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Endnotes

- 1 Deloitte Center for Health Solutions 2015 Survey of US Health Care Consumers: Health care consumer engagement: No "one-size-fits-all" approach
- 2 Deloitte 2015 American Pantry Study: The call to re-connect with consumers
- 3 Deloitte 2015 Global Mobile Consumer Survey: US Edition – The rise of the always-connected consumer
- 4 Deloitte 2016 Millennial Survey: Winning over the next generation of leaders
- 5 Deloitte Center for Health Solutions 2015 Survey of US Health Care Consumers: Health care consumer engagement: No "one-size-fits-all" approach
- 6 Deloitte Center for Health Solutions 2015 Survey of US Health Care Consumers: Health care consumer engagement: No "one-size-fits-all" approach
- 7 Deloitte Center for Health Solutions 2012 Survey of US Health Care Consumers: Five-year look back
- 8 Deloitte Center for Health Solutions 2015 Survey of US Health Care Consumers: Health care consumer engagement: No "one-size-fits-all" approach

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