

THE QUEST FOR VALUE IN HEALTH CARE: A PLACE FOR CONSUMERS

Three key disruptors are emerging that place the consumer center stage in health care:



In a health care system where consumers are empowered to actively choose among health plans, providers, and treatment options, delivering a satisfying customer experience is key to differentiation. The first step towards winning in a consumer-centric marketplace: understand how this new informed and engaged consumer views the health care system and how they define quality and value.

The health care system underperforms
 Nearly half of consumers surveyed believe that the health care system **misses the mark** on delivering value.



Customer service and bedside manner are highly valued, yet often lacking
 2 in 3 respondents cite **customer service** as a primary source of dissatisfaction.

As costs rise, so do concerns
 With nearly half of all respondents reporting increased out-of-pocket spending, only **1 in 5** consumers surveyed **feels prepared** for future health care costs.

A generational sea-change is coming
 Millennials and Generation X are the most likely to do research on price and quality before agreeing to receive treatment.

Price + quality = value**
 The consumer value equation is a combination of price and quality. So how do consumers define "quality care"?
 o Providers who take their time during an appointment
 o Providers who are easily accessible
 o Providers who exhibit a good bedside manner as well as demonstrate knowledge and technical proficiency

Increased cost-sharing presents tough choices
1 in 3 consumers surveyed would skip care and/or use over-the-counter products to **avoid the cost** of going to the doctor or hospital.

*Findings based on results of the Deloitte Center for Health Solutions 2013 Survey of U.S. Health Care Consumers except where noted with **

**Source: Robert Wood Johnson Foundation. Consumer Beliefs and Use of Information about Health Care Cost, Resource Use, and Value Findings from Consumer Focus Groups. Aligning Forces for Quality. [Cited: October 2012]. Available from: <http://www.rwjf.org/en/research-publications/find-rwjf-research/2012/10/consumer-beliefs-and-use-of-information-about-health-care-cost--.html>

As consumers take on more health care costs and choice-based health markets develop, value will become a driving force that shapes consumers' perceptions, decisions, and long-term relationships with health care providers, payers, and other stakeholders. Value, for consumers, increasingly extends beyond price to include the quality of the patient-family experience and interpersonal interactions.

The consumer of the future will be informed, engaged, and equipped. Is the industry prepared?

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To read more about these findings, the survey methodology, and for steps industry stakeholders should consider to help win in a consumer-centric health system, visit www.deloitte.com/us/questforvalue.

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