

# 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?



Follow @DeloitteHealth  
#QuestForValue

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](http://www.deloitte.com/us/questforvalue).

As used in this document, "Deloitte" means Deloitte LLP and its subsidiaries. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

Copyright ©2014 Deloitte Development LLC. All rights reserved.  
Member of Deloitte Touche Tohmatsu Limited

Deloitte Center  
for Health Solutions

**Deloitte.**