



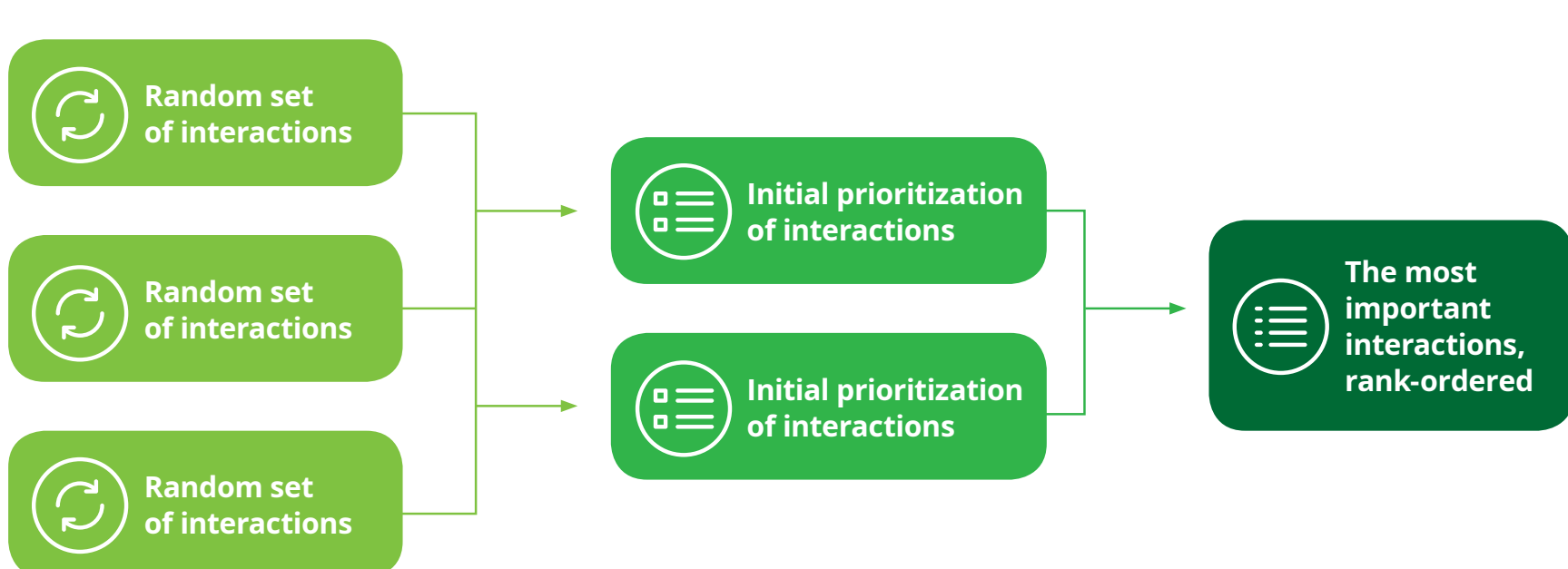
Health plans:

What matters *most* to the health care consumer

Deloitte's 2016 Consumer Priorities in Health Care Survey

The study: Forced consumers to prioritize which health care interactions are most important

64 interactions across the health care ecosystem (health plans, health care providers, pharmacy, etc.) were evaluated using the Bracket™ methodology, a **tournament-style approach to prioritization**

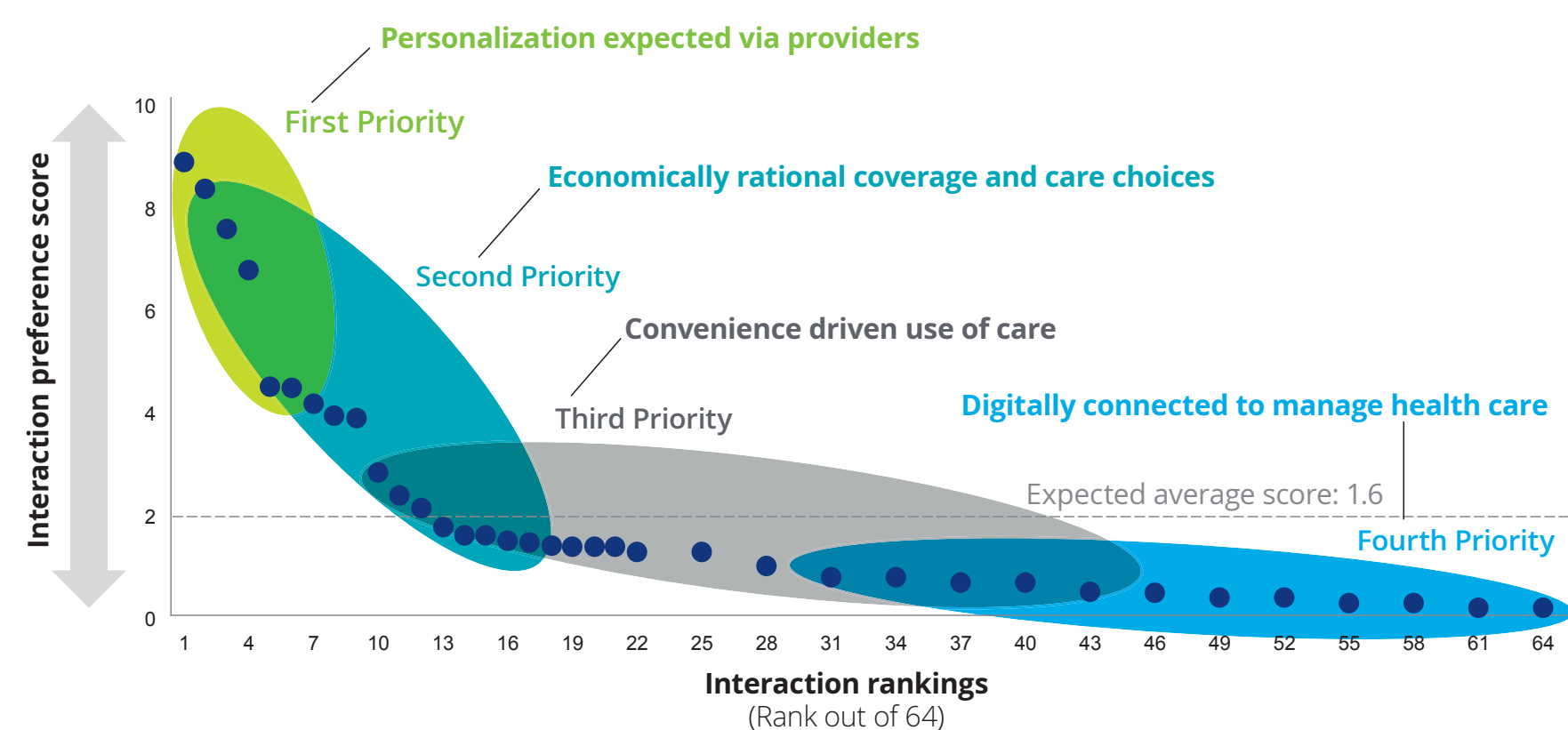


The total value of all rated interactions adds to 100, and **if respondents rated all interactions the same, each interaction would have an expected value of 1.6 (=100/64)**

Note: "Bracket" is the trademark of TRC, a research partner commissioned by Deloitte for this study; in this study with 1,787 consumers, consumer respondents were asked to "select the one that is most important to having a positive customer experience and the one that is least important to having a positive customer experience" at each stage.





The results: Consumers want to be heard, understood, and given clear directions through a personalized health care experience.

Rankings across the general population of consumer



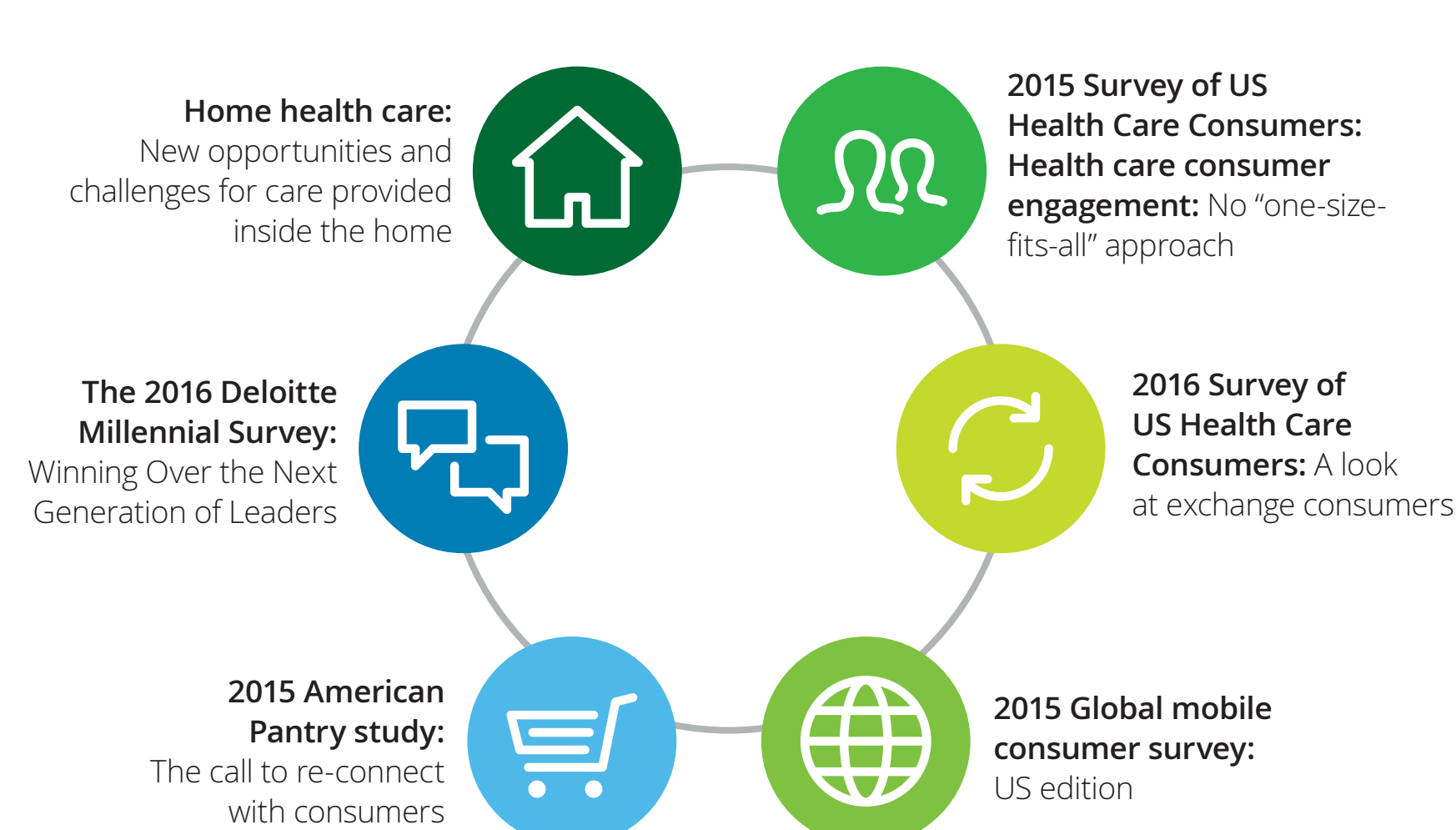
Source: "2016 Health Care Consumer Experience Survey" (DeloitteNote: Only every third point from Interaction Ranking #22 onwards is shown).

The Implications

 <p>Priority 1 Personalization Expected via Providers</p> <p>Plans need to reassess what portion of consumer experience investment goes toward working with and through providers vs. investments made within the plan's own organizational boundaries</p>	 <p>Priority 2 Economically Rational Coverage & Care Choices</p> <p>There is a need for both enhanced cost estimation capabilities that go 'beyond the average' and increased simplicity in product design</p>	 <p>Priority 3 Convenience Driven Use of Care</p> <p>There is an increased opportunity to steer consumers to more accessible sites of care that are also lower cost — a mutually-beneficial situation</p>	 <p>Priority 4 Digitally Connected to Manage Health</p> <p>Plans need to assess if/how their digital tools are being utilized and which digital tools actually matter for each member segment</p>
---	--	---	--

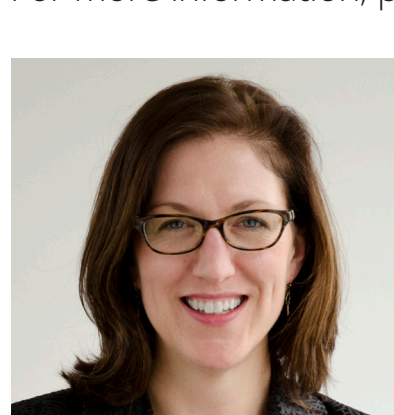
Understanding the Engaged Health Care Consumer

View Deloitte's published studies related to the major trends that are shaping the health care consumer at www.deloitte.com by searching these titles featured below:

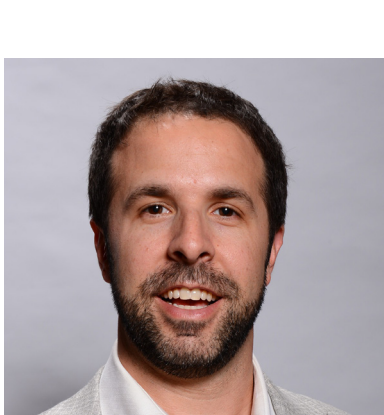


To learn more about the survey, go to: www.deloitte.com/us/cxsurvey

For more information, please contact:



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