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**Deloitte's 2011 Survey of Health Care Consumers:
Key Findings, Strategic Implications**

**Deloitte Center for Health Solutions
Washington, DC
August 2011**

Agenda

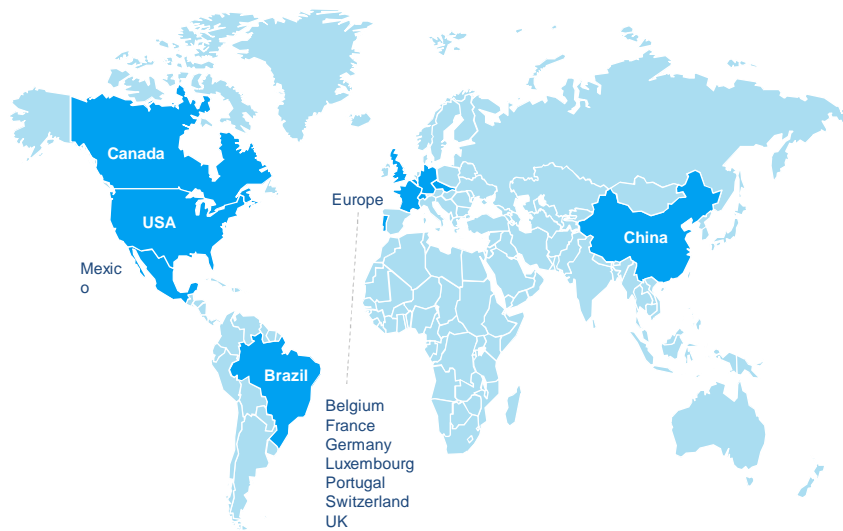
- Overview and methodology
- Overarching themes
- Perceptions of health care system performance
- Consumer interactions with their health care system
- Unmet needs and opportunities
- Five major barriers

Source: Deloitte's 2011 Survey of Health Care Consumers.

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Deloitte's 2011 Global Survey of Health Care Consumers

15,735 consumers were surveyed in 12 countries



Source: Deloitte's 2011 Survey of Health Care Consumers.

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Surveys examine health care consumers' behaviors, attitudes, and unmet needs in six zones (since 2008)

Methodology

- Web-based questionnaire
- Fielded in April
- Respondents:
 - Randomly selected from online population
 - Representative with respect to age, gender
 - U.S. and Canada sample further adjusted for geography and income
- Margins of error at .95 level:
 - +/- 1.6% for US
 - +/- 2.0% for Canada
 - +/- 3.0% for Europe & South America
 - +/- 4.1% for Luxembourg (.90 level)
 - Convenience sampling approach was adopted in China.

Conceptual Model



Source: Deloitte's 2011 Survey of Health Care Consumers.

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Questions targeted recent use (behaviors), factors influencing use, attitudes, satisfaction, unmet needs

Wellness & Healthy Living

- Effort to improve or maintain health
- Participation in wellness programs
- Participation in health/disease mgmt
- Adherence to treatment
- Interest in self-monitoring devices

Traditional Health Services

- Perception of provider quality differences
- Preferences in choice of doctor/hospital
- Satisfaction with doctor/hospital services
- Types of care sought in past year
- Decisions to forego or delay care
- Willingness to travel for care
- Reasons for switching doctors, treatment
- Interest in special services and programs
- Retail clinics
- Prescription medications
- Genetic testing

Alternative Health Services

- Alternative practitioners and therapies — preferences, use, reasons for using

Information Resources

- Use of Internet to find information about treatments, doctors, hospitals, health plans
- Level of trust in various information sources
- Use of quality, cost, and safety information
- Interest in using online medical records, email with doctors, integrated systems
- Personal health records

Health Insurance

- Financial preparation for future costs
- Adequacy of and satisfaction with insurance
- Factors important to health plan choice
- Benefits/features important if customizable
- Contact w/plan to raise questions/complaints

Health Policy

- Economic impact of health care on family
- Views of 16 reform proposals / role of government

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2011 study included a core set of common questions, and unique country specific questions

	Sample	Questions Asked	Potential Follow-Up Questions	Language
Belgium	1000	67	31	Dutch, French
Brazil	1000	56	29	Portuguese
Canada	2304	84	33	English, French
China	1000	67	31	Chinese
France	1001	78	29	French
Germany	1000	67	27	German
Luxembourg	430	69	30	French, Luxembourgish
Mexico	1000	71	33	Spanish
Portugal	1000	67	29	Portuguese
Switzerland	1000	65	31	German, French, English
UK	1000	73	28	English
U.S.	4000	84	33	English, Spanish

Source: Deloitte's 2011 Survey of Health Care Consumers.

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Overarching themes

Overarching themes from Deloitte's 2011 Global Survey of Health Consumers

- A health system's perceived performance is unrelated to its funding or structure; it is driven by consumer impressions and expectations.
- Consumers tend to be uninformed but strongly opinionated; they are heavy users, but largely disengaged in decisions about their health and health care; they are concerned about costs, but not clear on alternatives other than delayed care.
- There is significant opportunity to engage consumers more effectively. It requires policymakers and industry stakeholders to align interests toward their engagement. Reducing costs, leveraging information technologies, and improving service delivery are notable areas for innovation and improvement.

Source: Deloitte's 2011 Survey of Health Care Consumers.

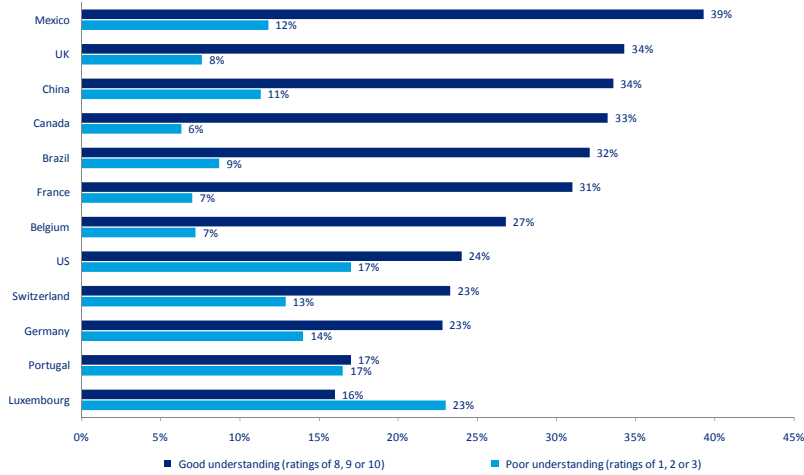
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Perceptions of health care system performance

Most consumers have a weak understanding of how their country's health care system works:

only 16% to 39% say they have a good understanding.

How well do you think you understand how your country's health care system works?



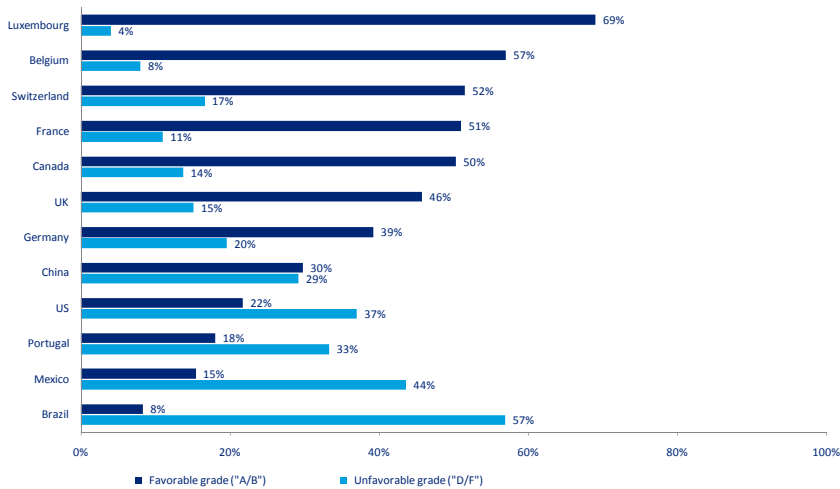
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Report card grades of system performance vary widely:

8% to 69% give their system an "A" or "B."

Using a typical report card scale with grades of A, B, C, D, and F, how would you grade the overall performance of the country's health care system?



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System strengths - Consumers give an “A” or “B” to innovation, advanced technology, and modernized buildings and facilities.

% of total who graded “A” or “B”	Medical innovation (treatments, service)	Up-to-date technology	Up-to-date buildings and facilities
< 20%			• Brazil (18%)
20% - 29%		• Brazil (28%)	• Portugal (29%)
30% - 39%	• Mexico (31%) • Brazil (34%)	• Mexico (39%)	• Mexico (33%) • United Kingdom (35%)
40% - 49%	• Portugal (40%) • China (43%) • Germany (44%) • United Kingdom (44%)	• Portugal (41%) • China (49%)	• France (42%) • Canada (46%) • Germany (46%)
50% or more	• Canada (51%) • Belgium (58%) • Luxembourg (60%) • United States (67%) • France (69%) • Switzerland (72%)	• United Kingdom (53%) • Germany (56%) • Canada (59%) • Luxembourg (62%) • Belgium (66%) • France (66%) • United States (77%) • Switzerland (81%)	• Belgium (50%) • China (54%) • United States (62%) • Luxembourg (69%) • Switzerland (72%)

Source: Deloitte's 2011 Survey of Health Care Consumers.

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System weaknesses - Consumers give a “D” or “F” to patient/consumer orientation, focus on wellness, and wait times.

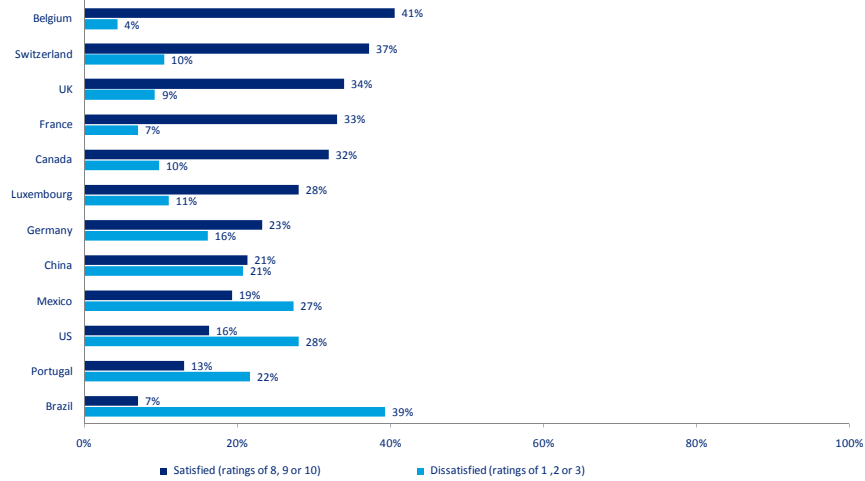
% of total who graded “D” or “F”	Patient/consumer oriented	Focus on wellness rather than illness	Wait times
< 20%	• Belgium (15%) • Switzerland (17%)	• Luxembourg (14%)	
20% - 29%	• Canada (22%) • United Kingdom (23%) • Luxembourg (24%)	• France (20%) • Belgium (21%) • Switzerland (21%) • Canada (26%)	• Switzerland (22%) • United States (28%)
30% - 39%	• France (30%) • United States (31%) • Portugal (37%) • Germany (38%)	• United Kingdom (30%) • United States (31%) • China (32%) • Portugal (34%) • Germany (38%) • Mexico (38%)	• Belgium (36%) • United Kingdom (36%)
40% - 49%	• China (47%) • Mexico (47%)		• China (45%) • Germany (45%) • Luxembourg (47%)
50% or more	• Brazil (57%)	• Brazil (51%)	• France (52%) • Canada (57%) • Portugal (70%) • Mexico (74%) • Brazil (81%)

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Dissatisfaction is widespread: only 7% to 41% are satisfied with their system's performance.

How satisfied are you with the performance of your country's health care system?

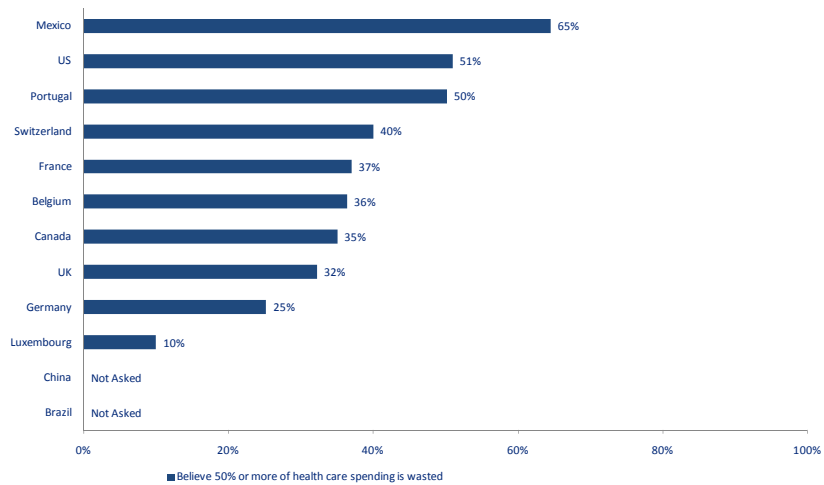


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Opinions about the wastefulness of the system vary widely.

Percent of people who feel that 50% or more of the total money spent on health care is wasted:



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Wastefulness is associated with inefficiency, unhealthy behaviors, and avoidable costs for end of life care, but varies by country.

	% who feel 50% or more is wasted	Top causes of wasted spending
Belgium	36%	Redundant paperwork (45%), end-of-life care (33%), unnecessary care (27%)
Canada	35%	Redundant paperwork (54%), unhealthy behaviors (42%), end-of-life care (30%)
France	37%	Redundant paperwork (53%), unhealthy behaviors (42%), end-of-life care (41%)
Germany	25%	Redundant paperwork (65%), unhealthy behaviors (46%), unnecessary care (41%)
Luxembourg	10%	Redundant paperwork (31%), unhealthy behaviors ((29%), unnecessary tests (21%)
Mexico	65%	Mismanagement/corruption (82%)*, redundant paperwork (64%), unhealthy behaviors (45%)
Portugal	50%	Redundant paperwork (67%), unhealthy behaviors (32%), end-of-life care (24%)
Switzerland	40%	Redundant paperwork (52%), unhealthy behaviors (44%), end-of-life care (41%)
UK	32%	Unhealthy behaviors (54%), redundant paperwork (53%), end-of life care (25%)
U.S.	51%	Redundant paperwork (55%), unhealthy behaviors (49%), defensive medicine (46%)

Note: Question was not asked in Brazil and China. * Question asked only in Mexico.

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French, Luxembourg, German, Swiss, and Belgian consumers believe their systems are better compared to other systems.

	Feel their country's system works better than most in the world	Believe quality of care in their system is comparable to the best in the world	Feel physicians and hospitals in their country have access to latest technologies
Belgium	42%	44%	44%
Brazil	6%	4%	16%
Canada	41%	38%	38%
China	13%	13%	24%
France	55%	50%	49%
Germany	46%	42%	50%
Luxembourg	52%	42%	31%
Mexico	8%	9%	28%
Portugal	10%	13%	21%
Switzerland	46%	57%	65%
UK	39%	31%	31%
U.S.	24%	37%	58%

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The majority of consumers – believe it is possible to improve quality and decrease costs simultaneously.

Privatization, government stewardship are problematic in every country.

	Feel government does a good job balancing priorities in health care	Feel increased privatization would improve their system	Feel it is possible to improve quality / reduce costs simultaneously
Belgium	16%	12%	43%
Brazil	4%	22%	56%
Canada	15%	22%	48%
China	18%	31%	42%
France	9%	11%	42%
Germany	9%	16%	62%
Luxembourg	12%	8%	35%
Mexico	9%	42%	69%
Portugal	8%	14%	41%
Switzerland	13%	12%	50%
UK	11%	17%	41%
U.S.	9%	23%	55%

Source: Deloitte's 2011 Survey of Health Care Consumers.

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Key takeaways:

health care system performance

- Opinions vary somewhat, but opportunities for improvement are prominent themes in every country.
- The perceived performance rating for a health care system is unrelated to its structure or financing model; regardless of system structure, its effectiveness is judged by consumers based on cultural expectations and personal experiences.
- Consumers do not have informed views of other systems of the world; they are not inclined to compare their system to “another” system, but more inclined to compare to “a better version” of their own.

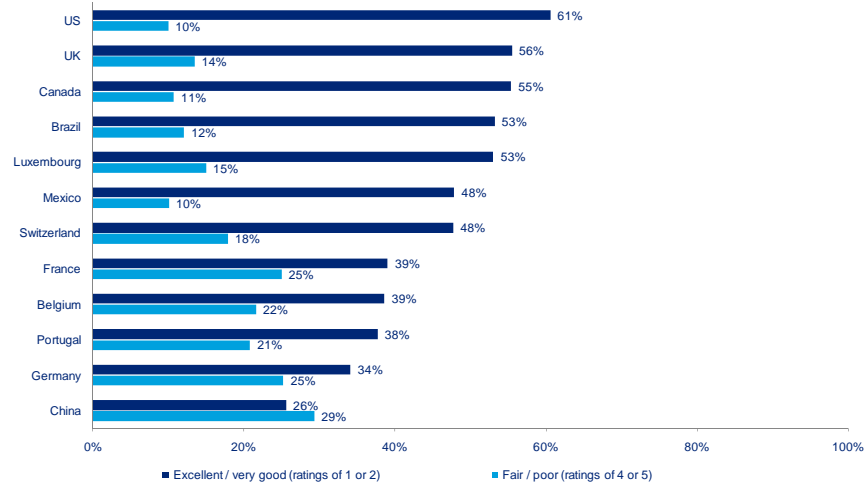
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Consumer interactions with their health care system

Self reported health status varies somewhat: a quarter to more than half say they are healthy, while less than a third say they are unhealthy.

In general, how would you rate your overall health?

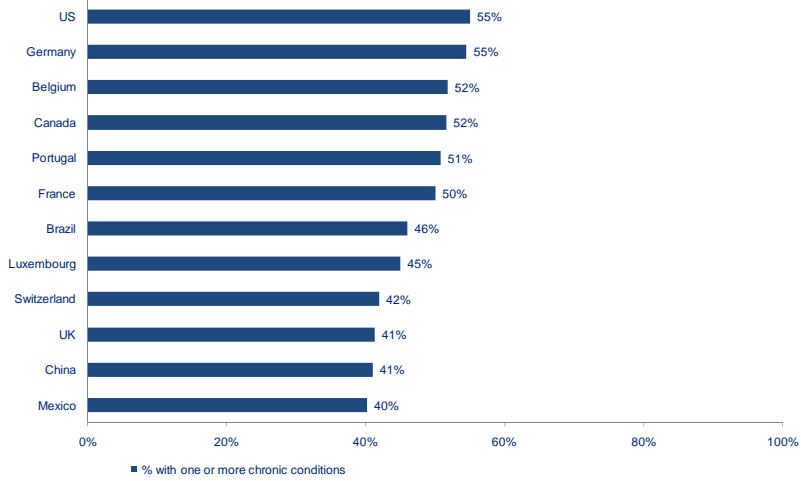


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4 to 5 in 10 have been diagnosed with one or more chronic conditions.

Have you been diagnosed by a doctor or other medical professional as having one or more chronic conditions?

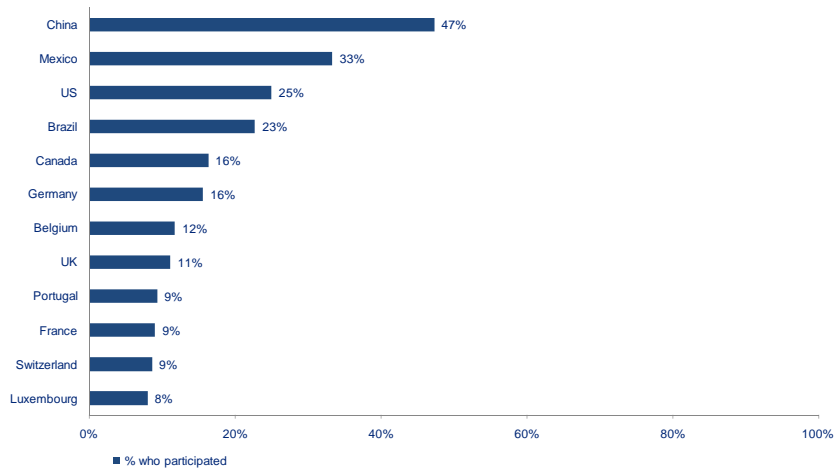


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Fewer than 1 in 4 participate in wellness programs except in Mexico and China.

Have you participated in a healthy living/wellness program offered by an employer, health plan, hospital, or other organization in the last 12 months?

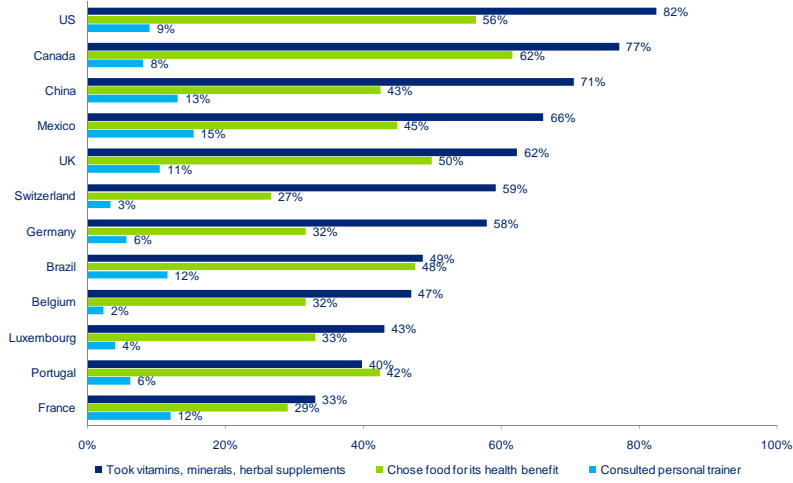


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Vitamin use and healthy food choices are associated with “healthy living” while physical exercise is low.

Which of the following have you done in the last 12 months?

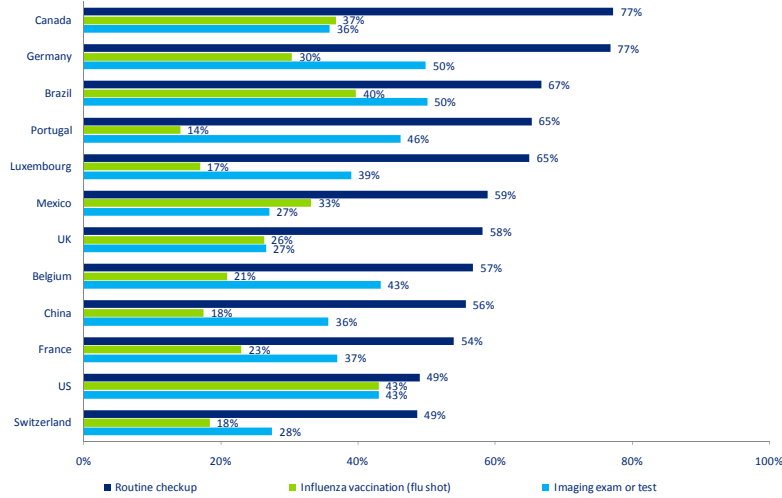


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Use of preventive care services varies widely across systems.

Have you received any of these health services in the last 12 months?



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Use of physicians, hospitals and prescription drugs also varies widely.

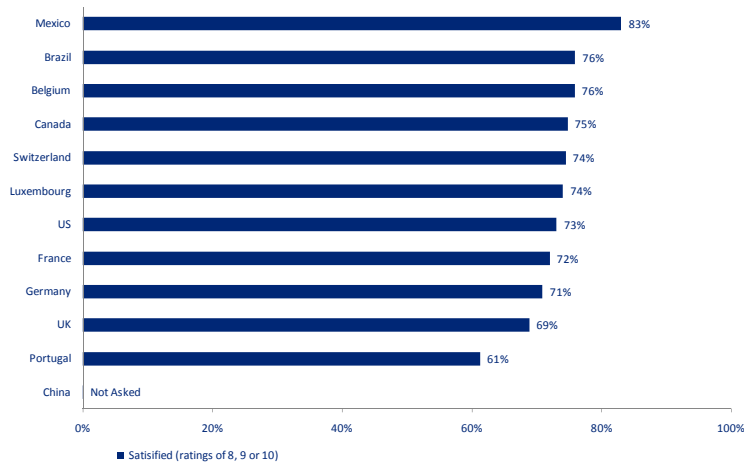
- Between 7 in 10 and 8 in 10 have a primary care provider (except in Brazil – 45%)
- Half or more had a routine check-up in the past year, ranging from 49% (Switzerland) to 77% (Canada, Germany)
- Visits for injury or illness: 43% (Portugal) to 61% (Mexico)
- 1/3 to 1/2 used hospital services in most countries
- Prescription medication use ranges from 33% (China) to 57% (U.S.)

Source: Deloitte's 2011 Survey of Health Care Consumers.

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Of those with primary care relationships, 61% to 83% are satisfied with the care they receive.

Overall, how satisfied are you with the quality of care you receive from your primary care provider?

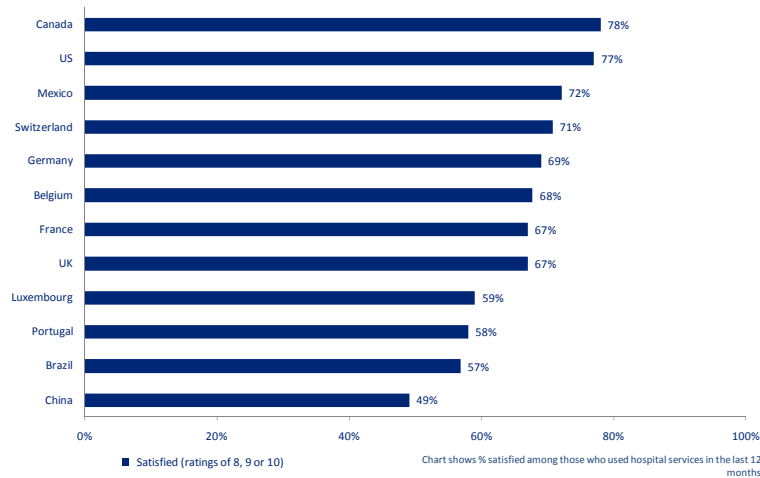


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Satisfaction with hospital services is highest in Canada and US, lowest in China, Brazil, and Portugal.

Overall, how satisfied are you with the quality of care received from the hospital you used most recently within the last 12 months?



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Key takeaways:

use of health systems

- Utilization of the health care system is ubiquitous: therefore, these experiences drive attitudes about the performance of the system rather than fact-based or systemic views.
- Service delivery – accessibility, paperwork, “hassles” – and costs drive impressions more than clinical performance: accuracy in diagnosis, appropriate care, latest technology, and outcomes.

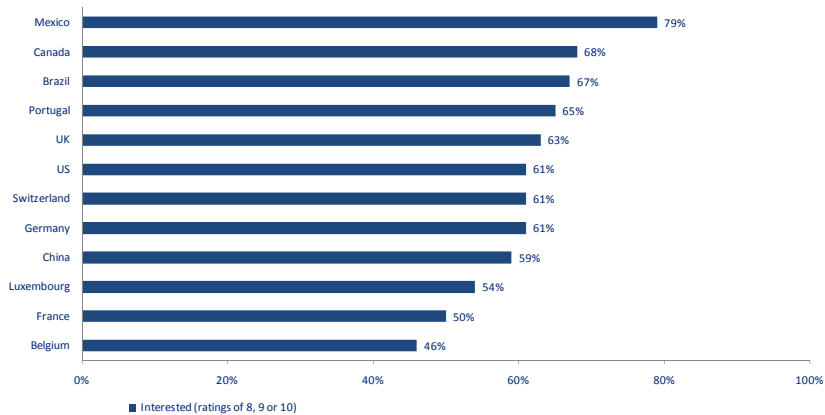
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Unmet needs and opportunities

Consumers are highly interested in using devices to help them monitor their health and communicate with their doctor.

If you have or were to develop a health condition that needs to be checked regularly, how interested would you be in using a medical device that would enable you to check your condition and send information to your doctor electronically through a computer or cell phone via the Internet?

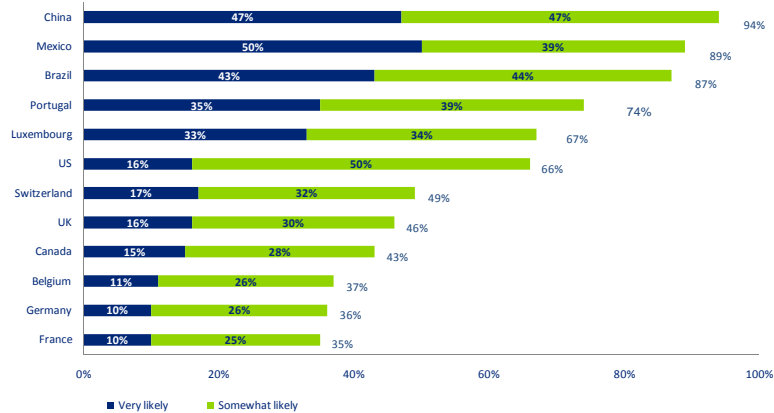


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Interest in using mobile communication devices to monitor health varies more across the countries.

If your medical records were available to you on your smart phone (or PDA), and you were able to download information about your medical condition and treatments, how likely would you be to use your smart phone (or PDA) to monitor your health?



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Use of online resources to evaluate treatment options, costs, and provider information is relatively low across all countries.

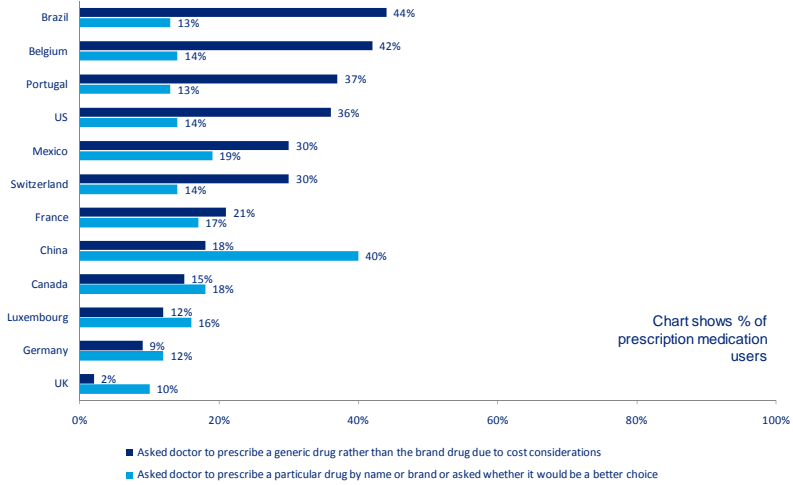
- 26% (Belgium) to 54% (Canada) report looking online for information about treatment options or a particular treatment
- 11% (France) to 44% (China) say they searched online for information about the quality of care provided by a primary care physician or medical specialist
- 6% - 7% (Luxembourg, Germany) up to 31% - 33% (Brazil, Mexico, China) looked online for information about the cost of services offered by a primary care physician or medical specialist

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Brand preferences for prescription drugs is low: 1 in 5 medication users ask doctors for specific drugs, 2 in 5 ask for generics.

Which of the following have you done in the last 12 months?

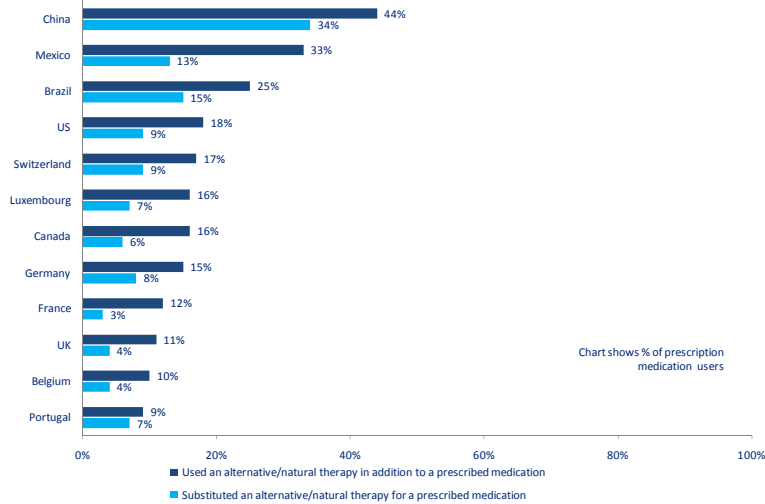


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Prescription medication users in China, Mexico, and Brazil report using alternative/natural therapies most.

Which of the following have you done in the last 12 months?

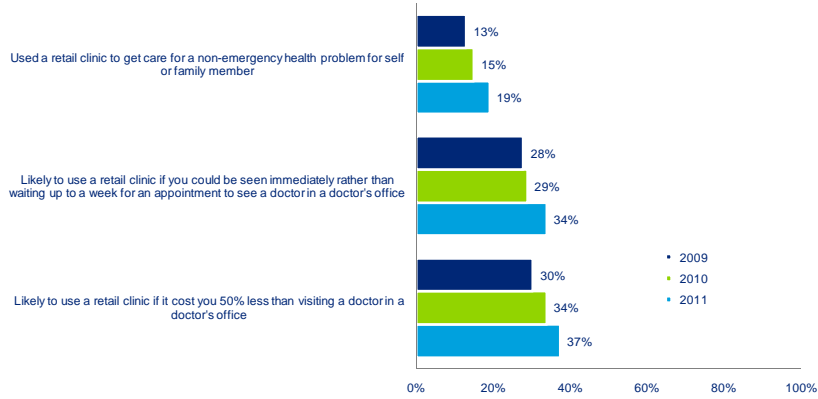


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Retail medicine is developed to different degrees across countries; interest exceeds current use, and both appear to be on the rise (U.S. shown).

Have you used a retail clinic in the past 12 months? If you needed care or treatment for a minor medical condition, how likely would you be to use a retail clinic?



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Consumers are more willing to travel for necessary care than for elective treatment; distance from home influences how far they are willing to go.

	Go to a hospital not the nearest one to home b/c of better quality of care or faster access	Go to a hospital outside your local town/city (e.g. in a major or different city) b/c of better quality or faster access	Travel outside your country
Belgium	49%	53%	12%
Brazil	66%	53%	18%
Canada	57%	43%	9%
China	50%	47%	14%
France	61%	66%	5%
Germany	57%	48%	4%
Luxembourg	Not Asked	65%	31%
Mexico	56%	41%	19%
Portugal	59%	53%	15%
Switzerland	46%	46%	9%
UK	59%	50%	5%
U.S.	54%	39%	3%

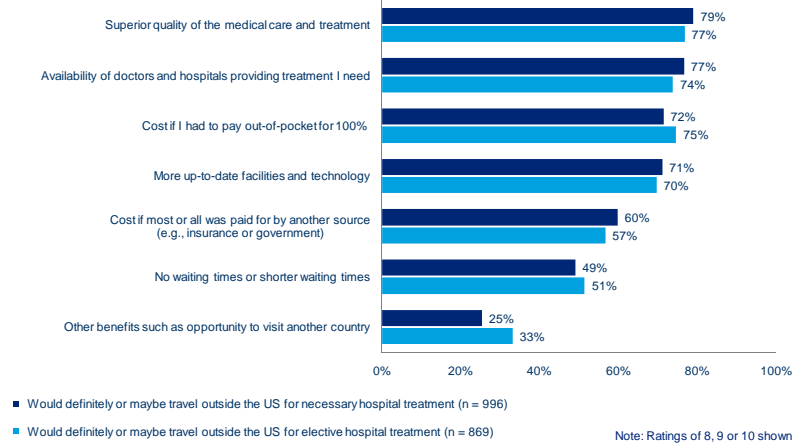
Note: Table shows % who are "definitely" likely to travel.

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Access to specialized services of higher quality or lower costs are key criteria for traveling out of country (U.S. shown).

What are the most important criteria that you would use to decide whether to travel outside the country to seek hospital treatment?



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Key takeaways:

unmet needs and opportunities

- In every system, consumers are receptive to improvements that will save them money, improve their “user experience,” and make it easier to receive services.
- Consumers do not appear concerned about clinical quality (diagnostic accuracy, appropriate care, treatment effectiveness) – engaging consumers in understanding clinical dimensions of health system performance is a major gap in health care consumerism.

Source: Deloitte's 2011 Survey of Health Care Consumers.

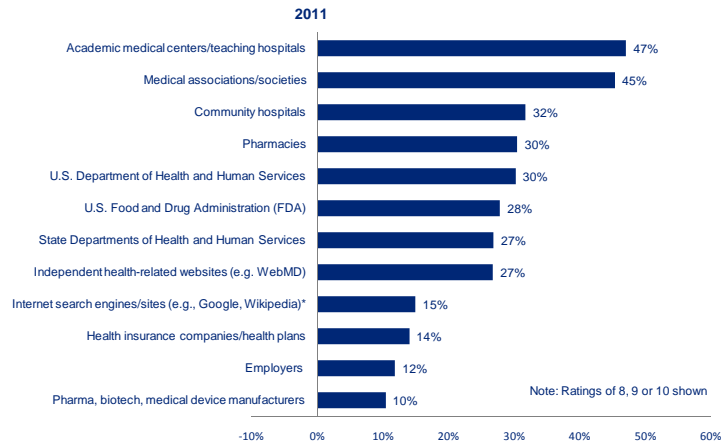
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Five major barriers

1 -Trust: consumers trust providers most for treatment information; trust in manufacturers, employers, insurers is lower.

Is the information they need available?
(U.S. shown)

If you wanted information about the most effective and safe treatment for a certain health condition, how much trust would you have in the following "third-party" sources to provide reliable information?



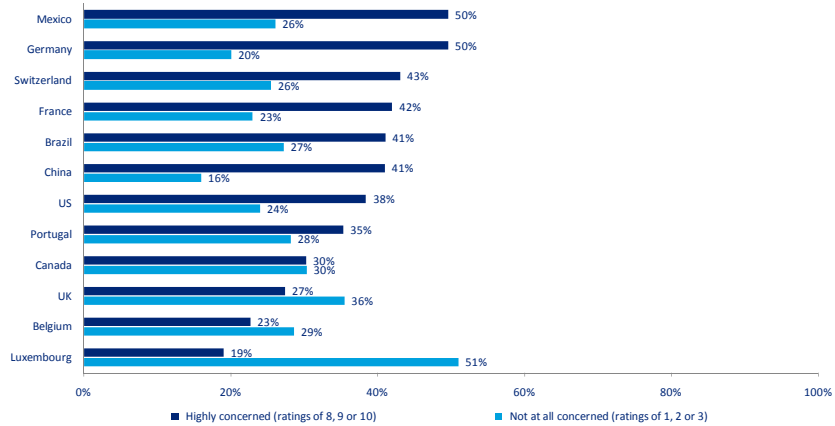
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2 - Privacy and security: consumers worry about the loss and misuse of their health information.

How can consumers get additional information if S&P issues prevail?

How concerned are you that the privacy and security of your personal health/medical information might be at risk if you were to use a computer program or website to maintain a personal health record that allowed you to share information with your doctor through an Internet connection?



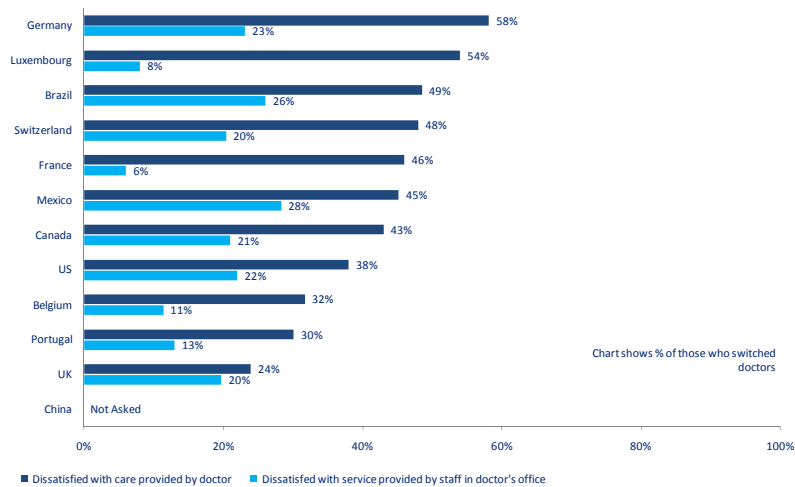
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3 - Physician continuity: dissatisfaction drives physician changes, compromising continuity of care.

How can health status improve if continuity is suboptimal?

Why did you switch doctors/medical professionals? (selected reasons shown)



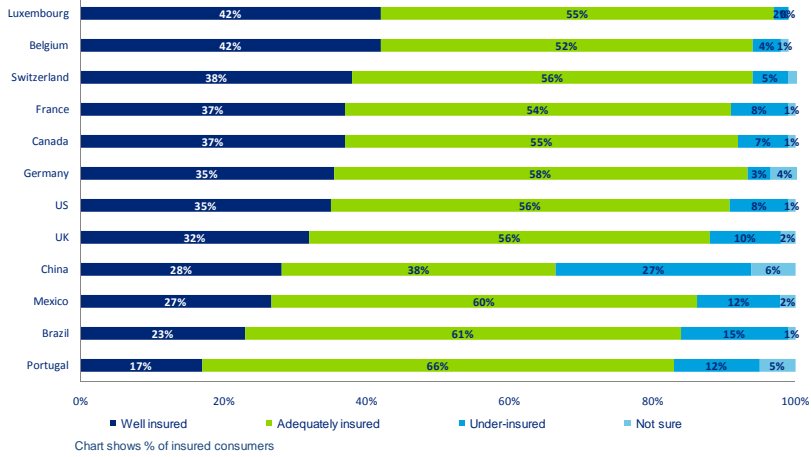
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4 - Uneven access to insurance that provides financial security: wide variation exists across countries.

How can insurance programs be aligned with financial security and incent responsible behavior by consumers?

Thinking about the amount and types of health insurance coverage you have, how adequately covered do you consider yourself to be?



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Many consumers purchase supplemental health insurance to avoid financial risk.

	Have primary insurance	Have supplemental insurance
Belgium	National insurance	81%
Brazil	Public system	75%
Canada	Majority through provincial or federal government	79%
China	93%	77%
France	97%	2%
Germany	99%	63%
Luxembourg	National system	68%
Mexico	86%	55%
Portugal	National system	58%
Switzerland	All have basic insurance	73%
UK	National system	46%
U.S.	88%	73%

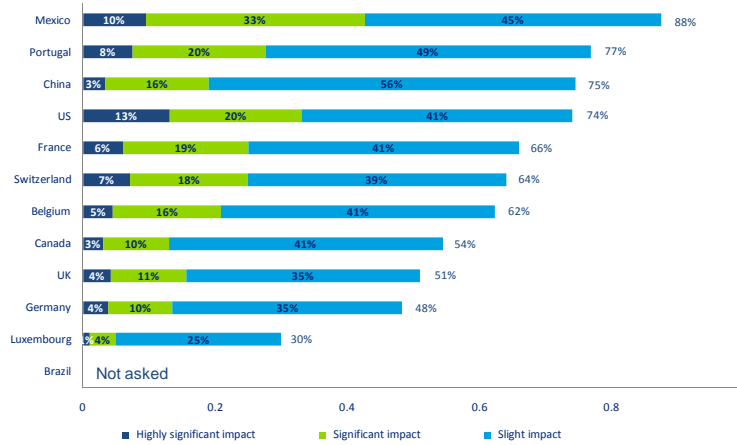
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5 - Out of pocket costs: households are forced to reduce health expenditures.

How can system costs be reduced?

Thinking about how much money you spend out of your own pocket on health care, to what extent has the recent economic slowdown made you reconsider how much you are willing to spend on health care?

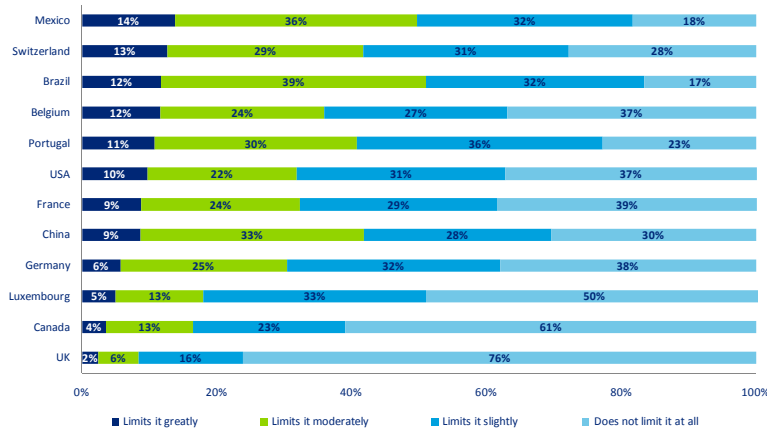


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Costs: monthly health care spending limits consumers' spending on other essentials.

To what extent does your household's current monthly level of spending on health care products and services limit your ability to spend money on other essentials such as housing, groceries, fuel, education and other things that are important to you?

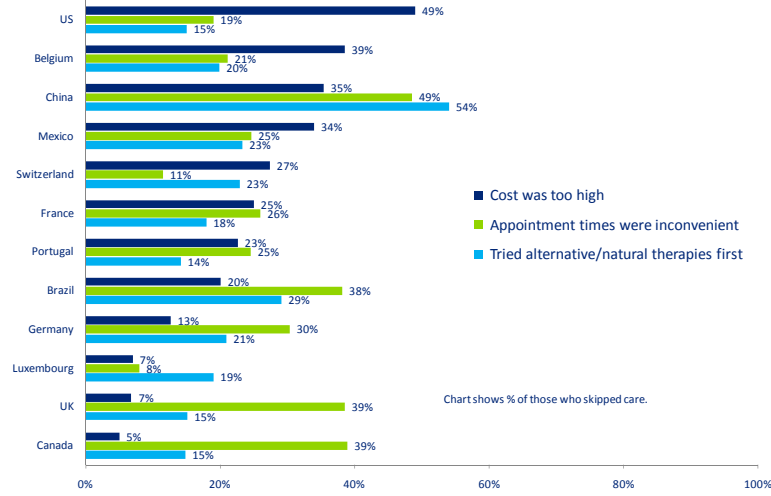


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Costs are prompting some consumers to skip care (shown) or delay treatment (not shown).

Why did you decide not to see a doctor when you were sick or injured? (selected reasons shown)

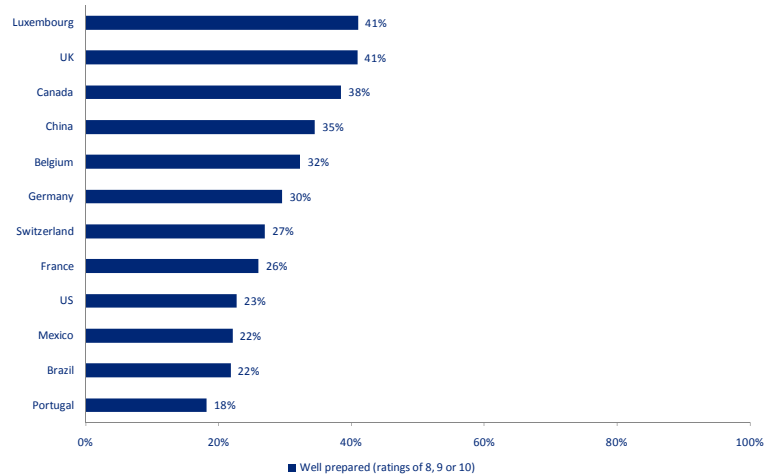


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Few consumers feel well prepared financially to handle their family's future health care costs.

To what extent do you feel your household is financially prepared to handle future health care costs?



Source: Deloitte's 2011 Survey of Health Care Consumers.

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Key takeaways:

barriers

- Costs to consumers are of growing importance to their behavior: policies that expose consumers to higher value/lower cost options will drive changes in consumerism.
- Alternative channels to equip consumers with needed information about costs, service, and clinical appropriateness are necessary: physicians and hospitals are not adequately serving the need.

Source: Deloitte's 2011 Survey of Health Care Consumers.

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Overarching themes

Overarching themes from Deloitte's 2011 Global Survey of Health Consumers

- A health system's perceived performance is unrelated to its funding or structure; it is driven by consumer impressions and expectations.
- Consumers tend to be uninformed but strongly opinionated; they are heavy users, but largely disengaged in decisions about their health and health care; they are concerned about costs, but not clear on alternatives other than delayed care.
- There is significant opportunity to engage consumers more effectively. It requires policymakers and industry stakeholders to align interests toward their engagement. Reducing costs, leveraging information technologies, and improving service delivery are notable areas for innovation and improvement.

Source: Deloitte's 2011 Survey of Health Care Consumers.

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