



Consumer Views of Care Management: Preview of 2009 Survey of US Health Care Consumers

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Model: Behaviors, attitudes and unmet needs in six zones of consumerism were the focus of the 2009 survey

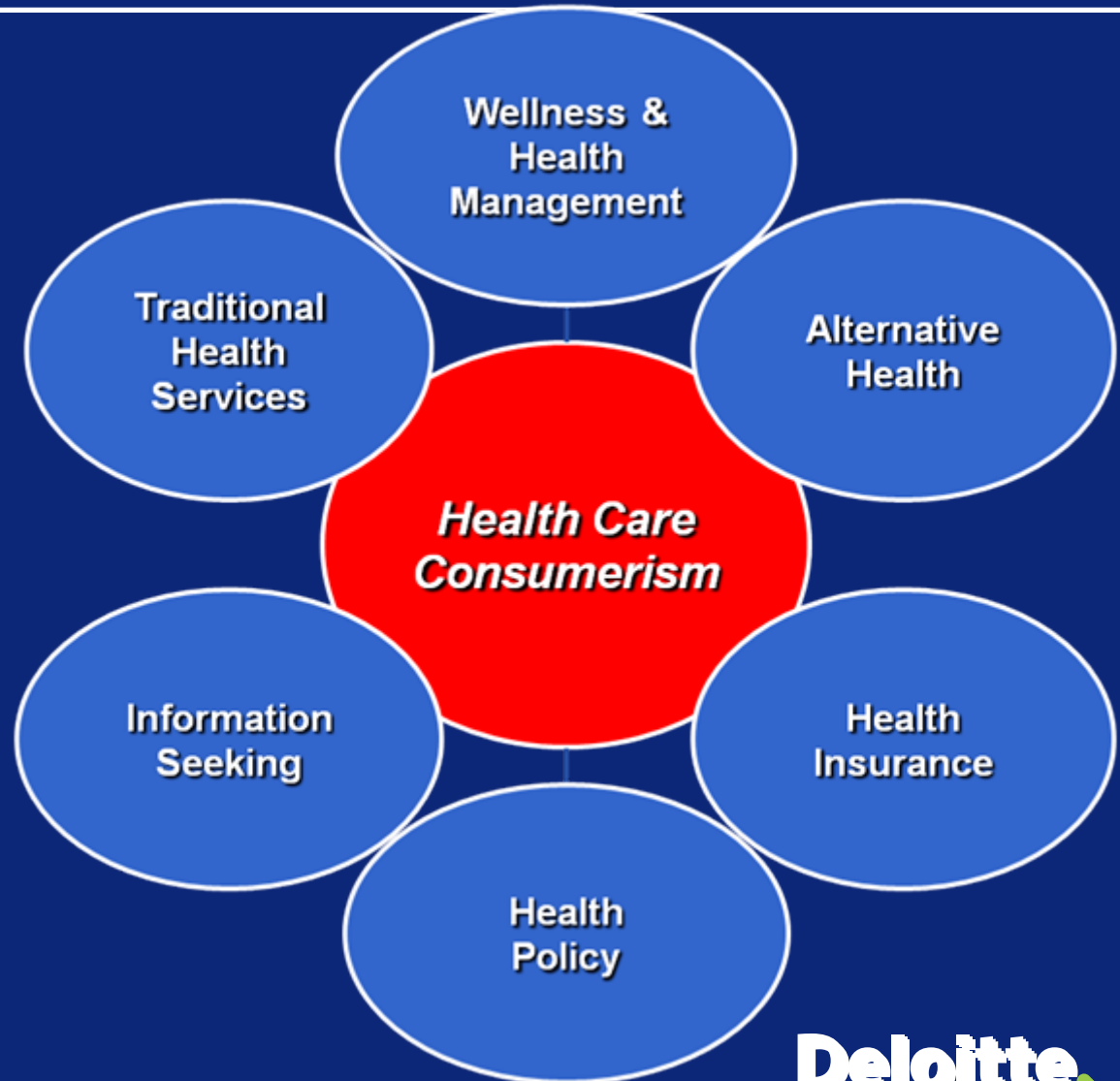
Consumers are typically referred as “patients”
In context of traditional services...

“enrollees” in health insurance....

“clients” in wellness and Alternative settings...

“voters” in health policy..

“users” when searching for information



2009: Most consumers believe the U.S. health care system is complicated, expensive, wasteful, and under-performing

- Most consumers (73%) are confused about how the U.S. health care system works
- Most (94%) believe health care costs are a threat to their personal financial security (regardless of the insurance they have/don't have or their health status)
- Over half (52%) believe 50% or more of the dollars spent on health care in the U.S. are wasted
- Most believe the system is performing poorly: 20% give it an A or B vs. 38% who grade it D or F

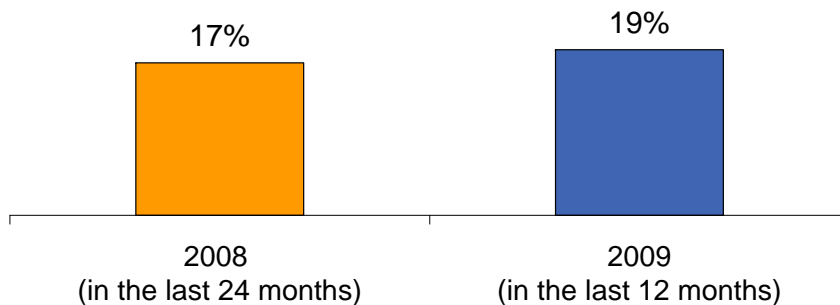
Source: *Health Care and Public Policy: What Americans Want*, Deloitte Center for Health Solutions, 2009.

2008/2009: The US health care consumer market is not homogenous: six segments differ in their level of activism, with 7 of 10 wanting improvements

Factor	Content & Compliant	Sick & Savvy	Online & Onboard	Shop & Save	Out & About	Casual & Cautious
Segment size	29%	24%	8%	2%	9%	28%
System use	Medium	Highest	High	Medium	Medium	Lowest
Preferences regarding care	Traditional	Traditional	Traditional, but open to non-conventional settings	Traditional, but open to alternative and non-conventional settings	Alternative approaches and non-conventional settings	Disengaged, but currently leans toward traditional
Dependence on providers	Accepts what doctor recommends	Takes charge of own care	Leans toward relying on self	Leans toward allowing doctor to make decisions	Makes own decisions/independent	Leans toward relying on self
Compliance with treatment	Most compliant	Compliant	Compliant	Less compliant	Least compliant	Less compliant
Satisfaction with providers and plans	Most satisfied	Satisfied	Satisfied	Less satisfied	Least satisfied	Less satisfied
Other important distinctions	Less likely to seek information; less likely to use value-added services; least interested in shopping for and customizing insurance	Seeks information; sensitive to quality; uses some value-added services; wants to shop for and customize insurance	Seeks information; uses online tools the most; sensitive to quality; maximizes use of value-added services	Makes changes to insurance; price-sensitive; uses value-added services; most likely to travel for care	Seeks information; sensitive to quality; uses some value-added services; wants to shop for and customize insurance	Price-sensitive; unprepared financially for future needs; less likely to seek information; less likely to use value-added services

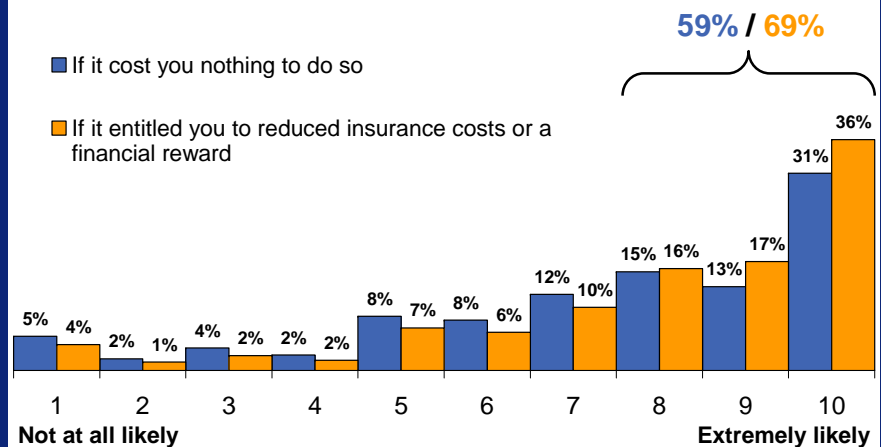
1 in 5 participated in a wellness program last year (up from 2008); more than half say they would if given a financial incentive

Percentage Who Reported Participating in a Healthy Living / Wellness Program



Deloitte's 2008 and 2009 Surveys of Health Care Consumers

How Likely Would You Be To Participate in a Health Living / Wellness Program?

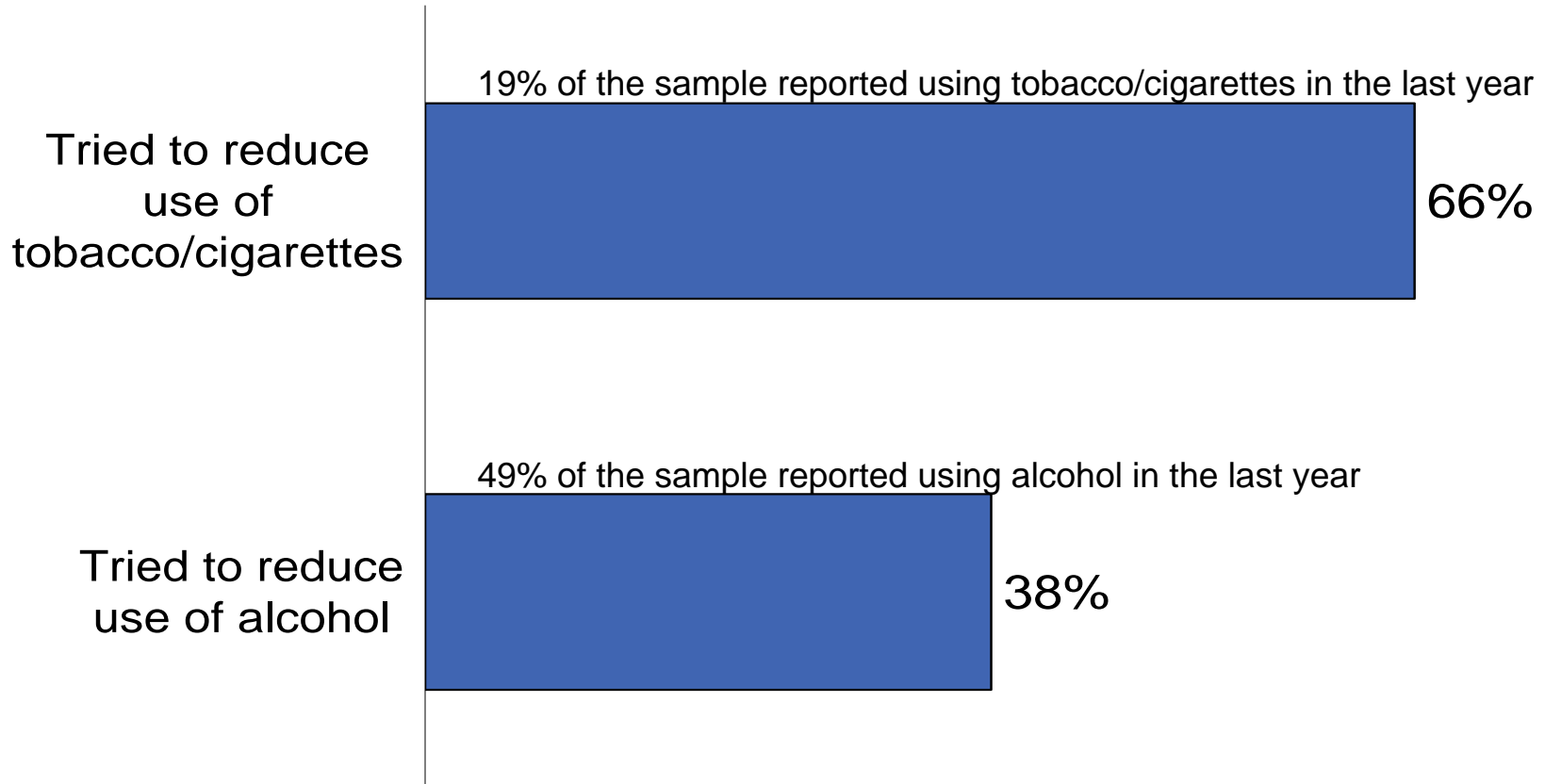


Deloitte's 2009 Survey of Health Care Consumers

- Participation is higher among consumers with employer-based insurance (23%) and lower among the uninsured (8%) and consumers with individual plans (9%)
- Seniors (15%) and Gen Y (17%) are less likely than Boomers (20%) and Gen X (20%) to report participating in wellness programs
- Current participation rates are similar between consumers who have one or more chronic conditions (18%) vs. those who do not (20%), but interest in doing so (if it cost nothing) is higher among those with chronic conditions (62% vs. 56%)

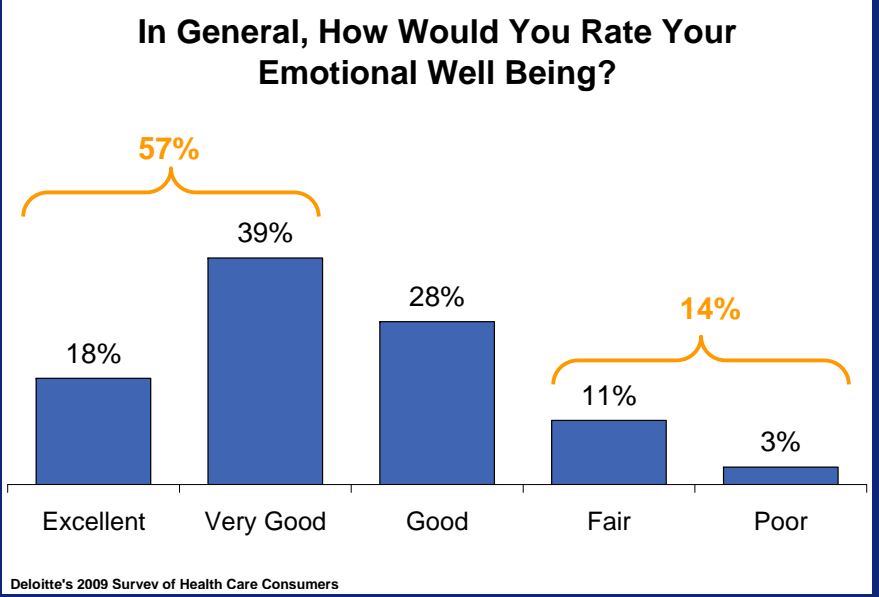
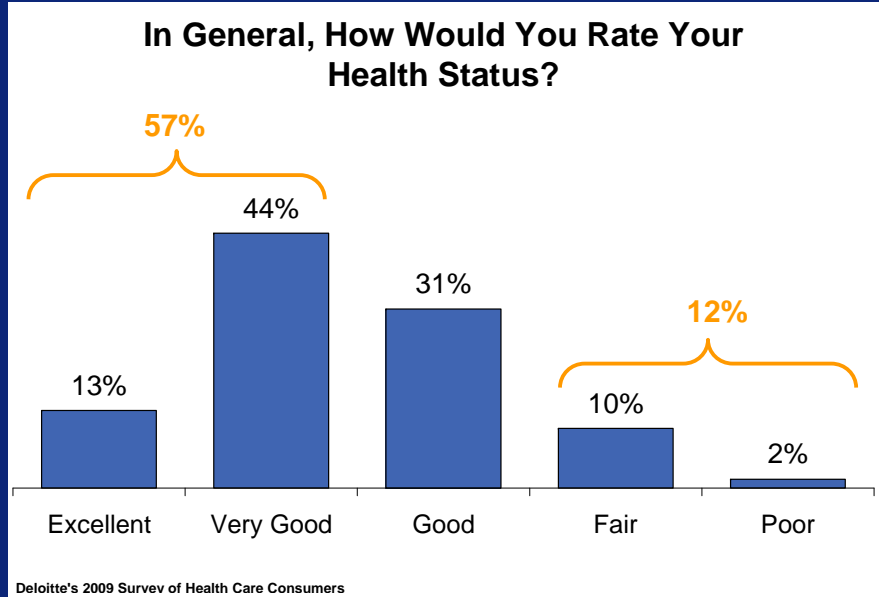
2 in 3 smokers tried to stop in the last year;
1 of 3 alcohol users tried to reduce consumption

Percentage of Users Who Tried to Reduce Their Use of Alcohol or Tobacco in the Last 12 months



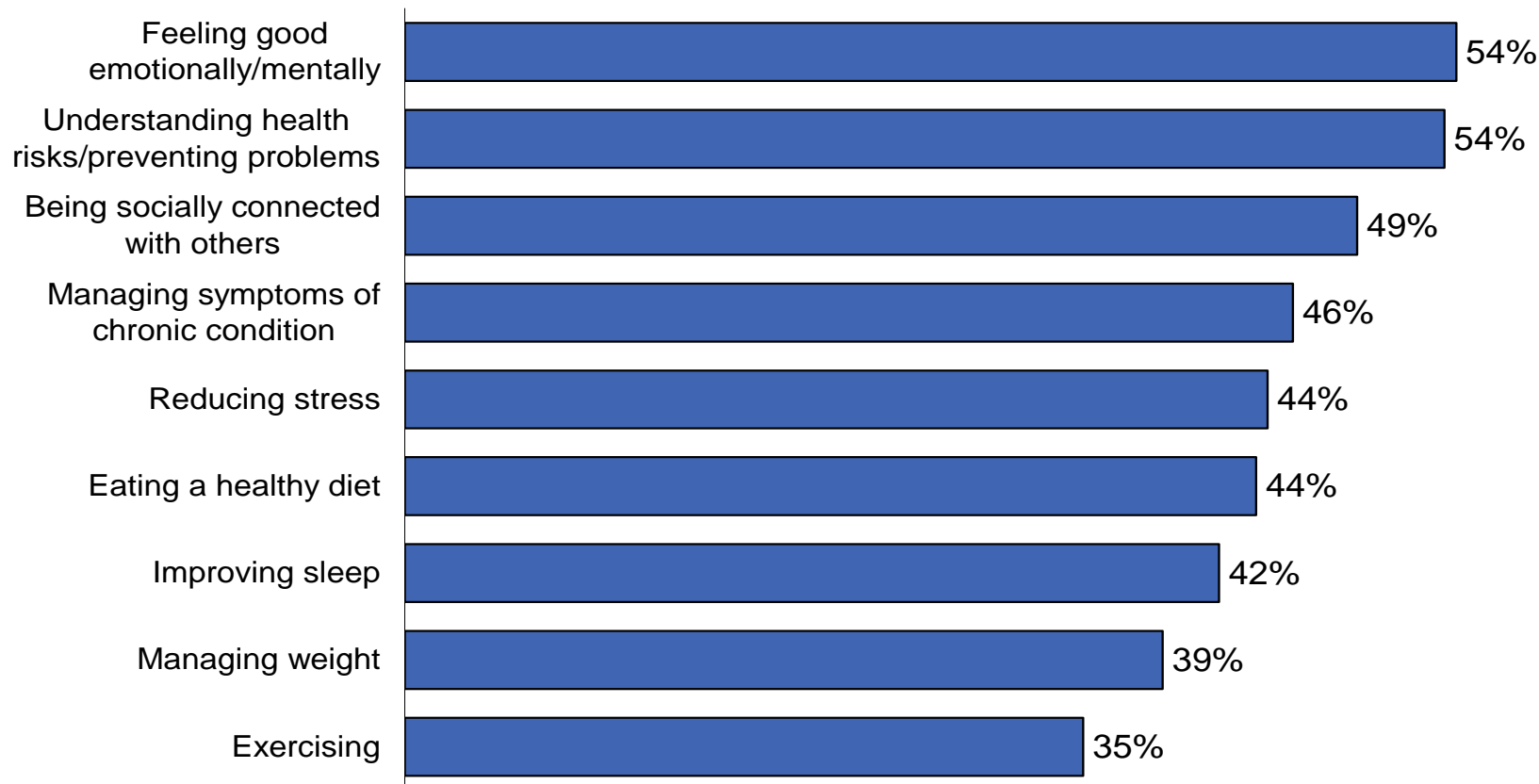
Deloitte's 2009 Survey of Health Care Consumers

Consumers generally feel they are in good health; 1 in 8 rate their health as fair or poor



Consumers report more success in managing emotional well-being than physical well-being

Percentage Who Currently Put Effort Into Improving or Maintaining Health and Well-Being

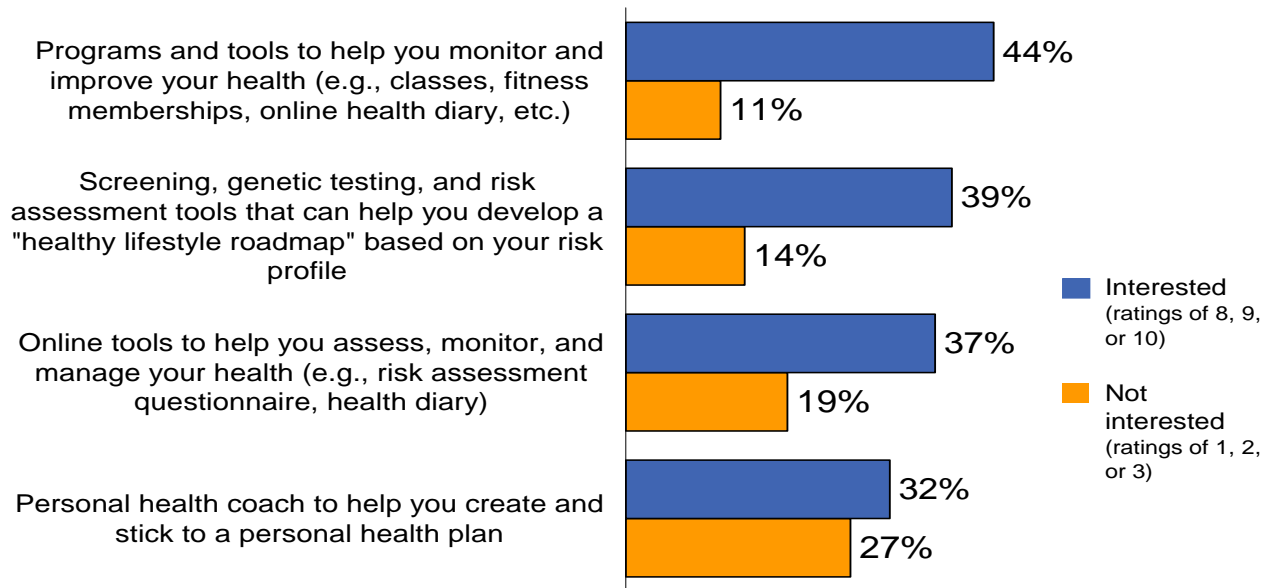


Deloitte's 2009 Survey of Health Care Consumers

NOTE: Chart shows % who gave rating of 8, 9, or 10 on 10-point scale

Almost half express interest in resources to assist in healthier living

Interest in Tools & Programs To Support Health Assessment and Improvement

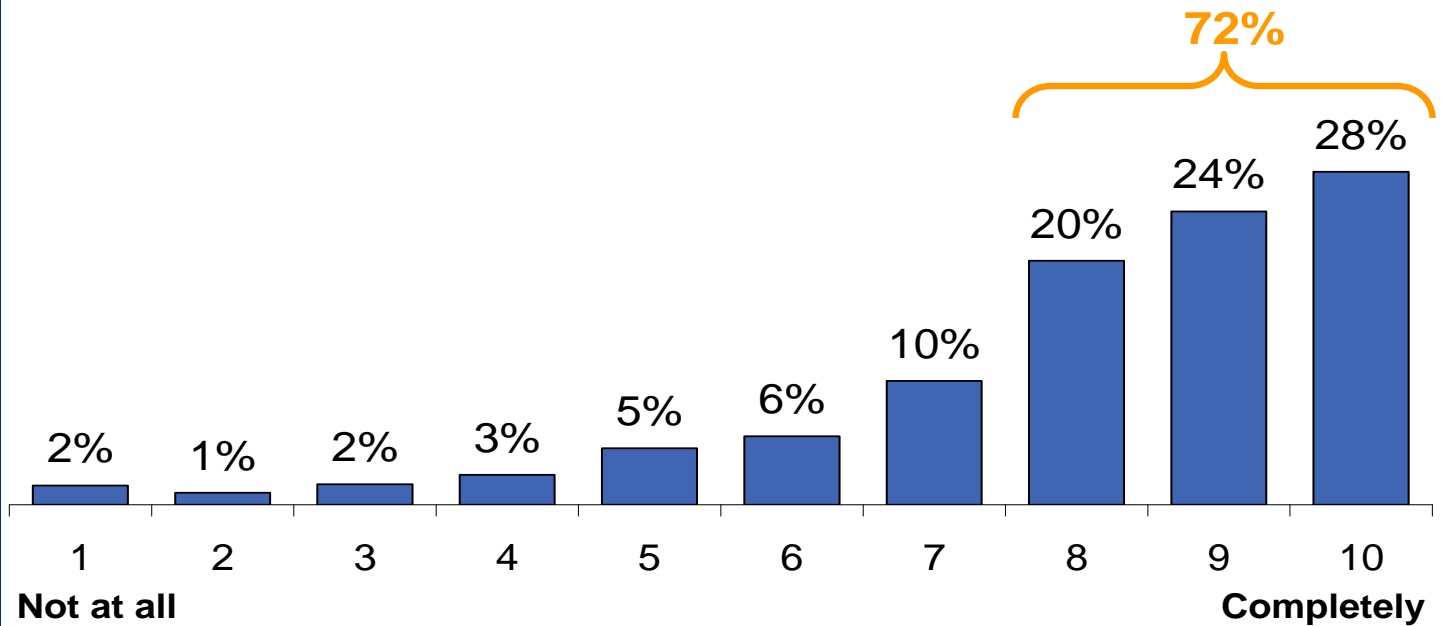


Deloitte's 2009 Survey of Health Care Consumers

- Interest in these tools and programs is especially high among Medicaid enrollees
- Levels of interest among Gen Y, Gen X, Boomers, and Seniors are similar
- Consumers with one or more chronic conditions tend to be more interested in these services than consumers who have no chronic conditions

7 in 10 of consumers with chronic conditions say they follow their treatment regimen

How Closely Do You Follow, Adhere To, or Comply With the Treatment Regimen(s) for Your Chronic Condition(s)?



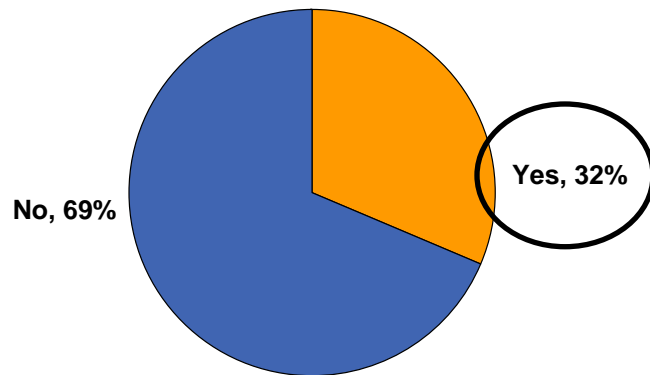
Deloitte's 2009 Survey of Health Care Consumers

n = 2,192 respondents with one or more chronic conditions

- Adherence increases with age: 48% of Gen Y, 60% of Gen X, 76% of Boomers, and 88% of Seniors report following their treatment regimen(s) closely
- Adherence is high among Medicare enrollees (85%), but low among uninsured (51%)

Consumers are willing to participate in chronic care management programs without financial incentives

Do You Currently Participate in a Health / Disease Management Program?

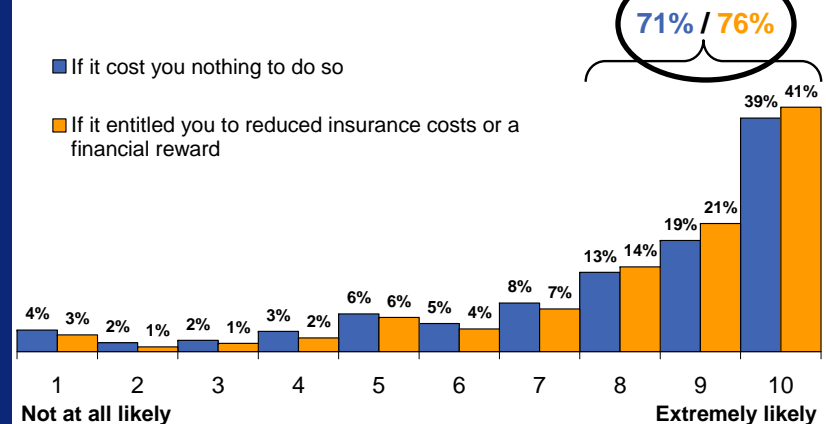


Deloitte's 2009 Survey of Health Care Consumers

n = 2,192 respondents with one or more chronic conditions

- Participation is higher among Medicaid enrollees (43%) and dual eligibles (49%), but very low among the uninsured (13%)
- Boomers and Seniors report higher participation rates (35% and 24%) than Gen Y and Gen X (26% each)

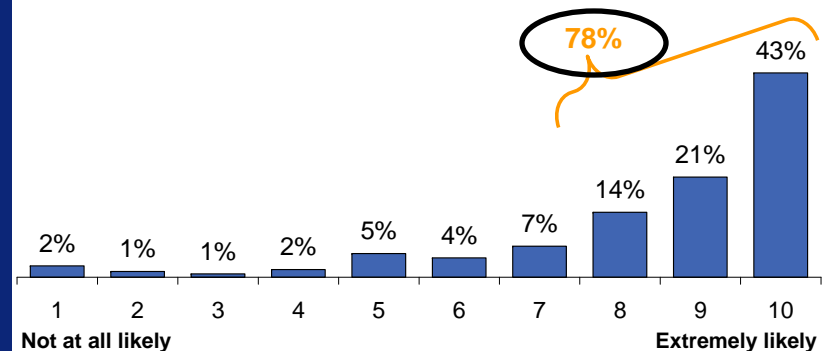
How Likely Would You Be To Participate in a Health / Disease Management Program?



Deloitte's 2009 Survey of Health Care

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How Likely Would You Be To Agree to See a Nurse Practitioner or Doctor on a Regular Basis if It Entitled You to Reduced Insurance Costs or a Financial Reward?

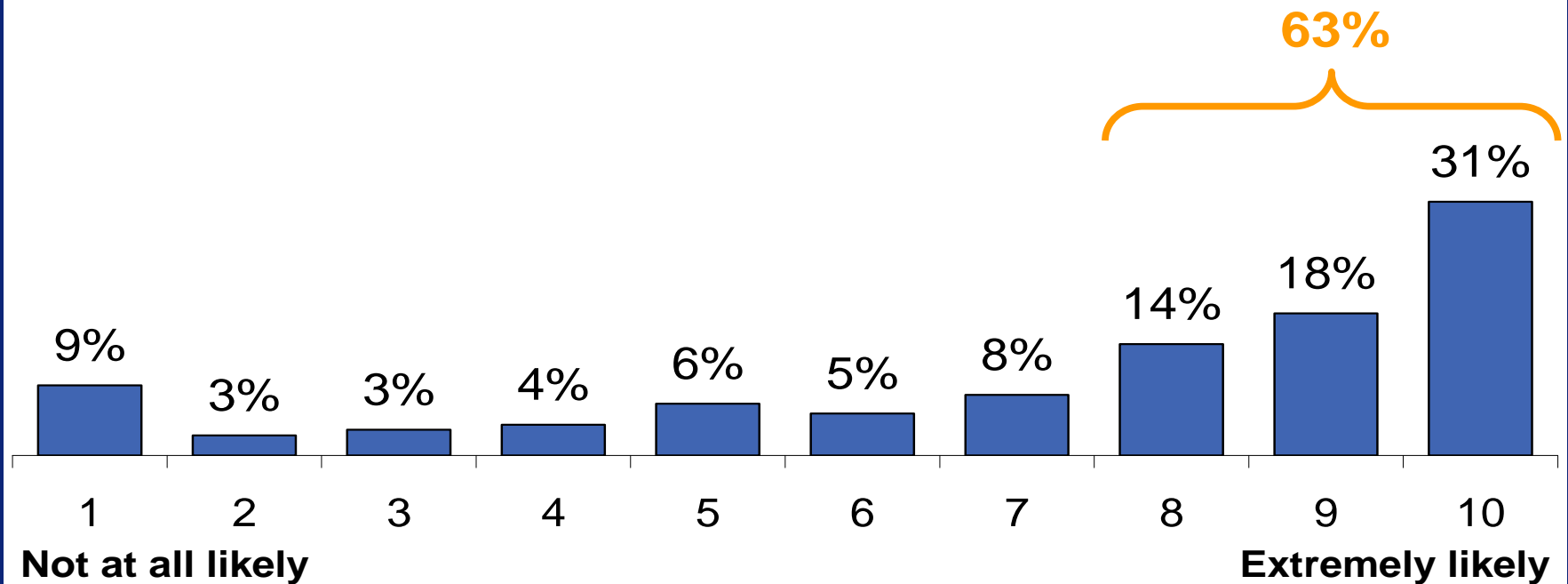


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3 of 5 say financial penalties would increase their adherence to their chronic treatment regimen

How Likely Would You Be To Comply With the Treatment Regimen Recommended by Your Doctor If You Would Be Required to Pay Higher Insurance Costs Otherwise?

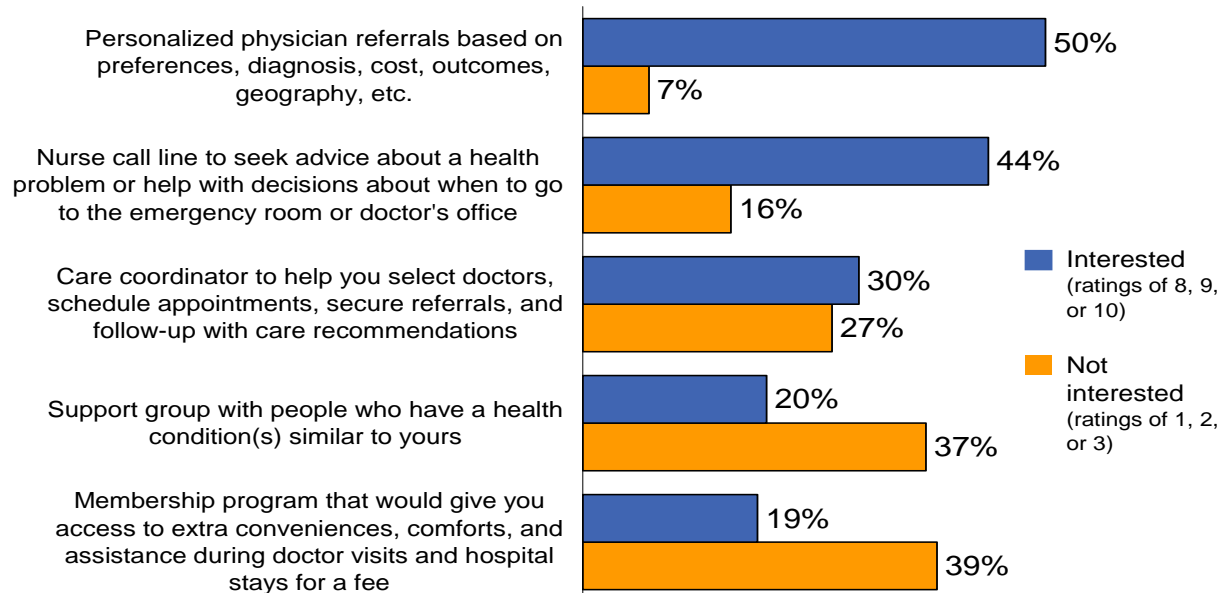


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Consumers want assistance in dealing with their health problems: coaching from their physician and nurses is optimal: only 1 of 5 sees value in support groups or alternative coordination roles

Interest in Services and Programs To Support Care Decisions and Management



Deloitte's 2009 Survey of Health Care Consumers

- Interest in these services and programs is especially high among Medicaid enrollees compared to the other insurance groups
- Consumers with one or more chronic conditions tend to be more interested in these services than consumers who have no chronic conditions

Key Themes: Consumerism in U.S. health care increasingly complex as behaviors, attitudes unmet needs vary widely

1. Health care is a consumer market. Costs, quality and service are important factors in purchasing, and satisfaction levels vary based on performance.
2. The market is not homogeneous: – there are six unique segments– 3 segments (19%) are activists, 2 segments (53%) are traditionalists, and 28% are disinterested
3. Most consumers believe the U.S. health care system is complicated, expensive, wasteful, under-performing,
4. Health cost concerns are changing behaviors.
5. Consumers want holistic care and resources to pursue wellness and healthy living.
6. Consumers embrace innovations that enhance convenience & service (retail medicine, self-monitoring devices), control of their personal health information (personal health records), and insurance programs that are customized.

Source: 2008 and 2009 Surveys of Health Care Consumers, Deloitte Center for Health Solutions.

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