Background
In April 2011, the Deloitte Center for Health Solutions conducted its fourth annual survey of health care consumers in the United States. Representative of the U.S. population, this study explored consumer attitudes, behaviors, and unmet needs. Several overarching themes emerged from survey results:

- A health care system’s perceived performance is unrelated to its funding or structure; it is driven by consumer impressions and expectations.
- While consumers hold strong opinions, these are based upon limited information; they are substantial users of health care, yet largely disengaged in decisions about their health and health care; they are concerned about costs, but are not aware of alternatives other than delayed care.
- There is a significant opportunity to engage consumers more effectively, but it will likely require policymakers and industry stakeholders to align interests toward that engagement; reducing costs and improving service delivery are notable areas for innovation and improvement.

In light of these findings, effective use of information technologies (IT) represents both an unmet need and an opportunity for the health care system to better engage consumers. Despite being heavy users of technology in everyday activities such as online shopping and banking, consumers tend to make less use of technology to support their health care decisions. Nevertheless, consumers share an enthusiasm for a technologically enabled health care system that enhances its accessibility, reduces paperwork, increases access to their personal health information, and improves its overall performance.

An analysis of findings relative to consumer interest in and use of information technology offers an explanation as to the current and future intersection of information technology and the role of consumers in the U.S. health care system.
Figure 1: Trusted sources of information

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

<table>
<thead>
<tr>
<th>Source</th>
<th>Trust Percentage</th>
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<tbody>
<tr>
<td>Academic medical centers/teaching hospitals</td>
<td>47%</td>
</tr>
<tr>
<td>Medical associations/societies</td>
<td>45%</td>
</tr>
<tr>
<td>Community hospitals</td>
<td>32%</td>
</tr>
<tr>
<td>Pharmacies</td>
<td>30%</td>
</tr>
<tr>
<td>U.S. Department of Health and Human services</td>
<td>30%</td>
</tr>
<tr>
<td>U.S. Food and Drug Administration (FDA)</td>
<td>28%</td>
</tr>
<tr>
<td>State departments of Health and Human Services</td>
<td>27%</td>
</tr>
<tr>
<td>Independent health-related websites (e.g., WebMD)</td>
<td>27%</td>
</tr>
<tr>
<td>Internet search engines/sites (e.g., Google, Wikipedia)*</td>
<td>15%</td>
</tr>
<tr>
<td>Health insurance companies/health plans</td>
<td>14%</td>
</tr>
<tr>
<td>Employers</td>
<td>12%</td>
</tr>
<tr>
<td>Pharma, biotech, medical device manufacturers</td>
<td>10%</td>
</tr>
</tbody>
</table>

Key findings

Gaps remain in consumers’ use of online tools and resources to supplement their interactions with physicians and hospitals.

Use of the Internet for gathering health information is an important tool for consumers. However, there exist differences in this use. Of the consumers who report using the Internet in the past year, 43% sought online information about medical treatment options, 28% looked for quality information on a physician or hospital, and only 19% looked for information on treatment costs. On the other hand, 90% of consumers report using the Internet to purchase merchandise, 84% to conduct online banking, and 65% to reserve an airline ticket.

Very few consumers say they used social networking capabilities to interact with their physicians or insurance companies. When consumers did use social media, it was primarily as a resource for information on prescription drugs (5%) or to comment upon personal experiences using the health care system (11%).

Consumers tend to turn to traditional medical sources as trusted avenues of health care information on effective and safe treatments, with close to half trusting most the information that was sourced from academic medical centers and medical associations. Less trust was found for specialty medical websites (27%) and for information from Internet search engines (15%) (Figure 1).
Most consumers want their physicians to make better use of information technologies, but few will switch physicians if the technologies are unavailable.

Overall, consumers are highly interested in using devices to monitor their health and communicate with their doctor; additionally, two in three consumers say they are interested in seeing physicians who use information technologies in their practice.

When asked if they would like to have a self-monitoring device if they had or developed a condition that required regular checks, 61% of consumers say they would want such a device to remotely send information to their doctor (Figure 2). Results are consistent across age groups.

By contrast, when asked if they wanted to have access to their medical records and information about their health on their smartphone or PDA, strong generational differences emerge. While 72% of Gen Y (born 1981-1993) say they are “somewhat” to “very” likely to use their phones to access their medical records, only 26% of seniors (born 1900-1945) feel similarly. Interest among generations in between these two follows the same inverse relationship.
However, before drawing the conclusion that seniors are less interested in technology than younger cohorts, it should be noted that significantly more seniors maintain electronic personal health records than do Gen X consumers (born 1965-1981) (17% versus 8%). Still, seniors say they would be less likely to switch doctors to gain electronic access to their medical records compared to Gen Y (53% say “not at all likely” versus 20%), although this may reflect the relative importance of other factors such as continuity of provider.

Privacy and security of personal health information is a concern to many.
Over three-quarters of consumers report that they are at least moderately concerned that the privacy and security of their information would be at risk if they were using a computer program or website to maintain a personal health record, or were sharing information with their doctor through an Internet connection (Figure 3).

Complicating this finding, other studies have shown that consumers are often less concerned about a complete security breach or medical identity theft than the sharing of specific elements within their medical record that they wish to keep private. For example, a study by Lake Research Partners and American Viewpoint showed that 77% of consumers reported being very concerned about their medical information being used for marketing purposes; 56% were concerned about employers gaining access to their health information; and 55% were concerned about insurers having access to this information.¹

¹ Lake Research Partners and American Viewpoint, Markle Foundation, November 2006
Information about health costs is important to consumers. Information technologies that support consumer awareness of the costs associated with their care can improve access and continuity of care. Rising out-of-pocket costs is an emerging driver of consumerism. Within the context of the current economic slowdown, 75% of consumers say they are reconsidering how much they are willing to spend on health care (Figure 4).

As a result, nearly half cite cost as the reason they decided not to see a doctor when sick or injured. In addition, 63% report that health care spending is limiting their ability to afford other essentials such as housing, groceries, fuel, and education. Unfortunately, when cost, quality, and value data are absent, deferring or delaying care is the predominant response, particularly in times of economic difficulty. As economic pressures continue to increase, consumers may progressively seek better information upon which to make value-based choices. For example, while only 19% say they had utilized a retail clinic in the prior 12 months for a non-emergency condition, 37% report they would seek care from a retail clinic if the cost were 50% less than visiting a doctor in an office.
Findings and implications for stakeholders
Based upon consumers’ attitudes and behaviors, some important findings emerge. As noted, consumers’ opinion of a health care system is based largely upon their own expectations and experience. Appropriate and expanded use of information technologies in the system is necessary to its long-term value proposition with consumers as they encounter technology-driven improvements in other industries where contrasts to health care are frequent.

Some issues to consider
• The gap in consumers’ use of online resources for health care compared with other uses presents an opportunity for innovation and service.
• Consumers are highly interested in using mobile devices and the Internet to be better informed about their conditions, communicate with their doctors, and monitor their own health.
• Generational differences should be considered when implementing technology, especially when choosing platforms. However, the notion that younger patients want more electronic access compared to older patients is not always correct. More seniors maintain electronic personal health records than Gen X.
• Trust in health-related information obtained from hospitals is much higher than many other common sources, including search engines, employers, payers, and manufacturers.
• The rising popularity of retail clinics, which typically provide electronic service assistance (locating facilities, statements of charges, wait times, etc.), underscores how information is valued by consumers.
• Collaboration between physicians and hospitals in developing consumer IT strategies can impact the quality and continuity of care, improving outcomes. Transparency of data regarding quality of service will have growing influence, but may be outpaced by consumer-driven social media.

Consumer expectations of health care are not created in a vacuum. Instead, they are driven by every other aspect of their lives. With ubiquitous availability of information online and on mobile devices for activities such as banking, shopping, and travel, expectations for the health care industry are rising. How stakeholders respond will have a profound impact on the way that U.S. health care is delivered and the value it achieves.

Survey methodology
A nationally representative sample of 4,000 American adults, aged 18 and older, responded to an online survey in April 2011. The sample was selected using a stratified random method, and all results are weighted to align with the U.S. census with respect to age, gender, race/ethnicity, and income. The margin of error is +/- 1.6% at the .95 level of confidence.

How to access the complete survey results
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