

Whose job is it to make me healthy?

4 Key Perceptions about Healthcare & Consumers



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The Healthcare Landscape Survey

Focus: Consumer Perceptions of Health Responsibilities

Who needs to educate consumers about the health conditions they face?

Who should be the one to coordinate healthcare?

What is the doctor's role and responsibility?

What's the role of health insurers when it comes to healthcare delivery?

The answers to these questions reveal a healthcare landscape in which consumers' perceptions are shifting.

In the very near future, the Health Economy will be driven by consumers who are willing to self educate regarding their health - but who have serious expectations of the people who are providing a professional service with high expectations for specific outcomes.

About the CT Healthcare Landscape Survey Series: Key facts

Produced by: Great Blue & drinkcaffeine

Sample size:

302 adults/CT residents; statistical validity: +/-5.6%

Gender skew:

78F/22M

Age Segments:

- 30%: 35-44
- 23%: 45-54
- 19%: 25-34
- 17.5%: 55-64
- 7%: 65-74

Education:

- 37%: College grad
- 37%: Postgrad/professional degree
- 16%: Some college

Race:

- 87%: White
- 5%: Black/African American
- 5%: Hispanic/Latino

Insurance:

- 33%: HMO/Private Insurance
- 25%: High deductible/HSA
- 16%: Other (Medicare, etc)
- 9%: ACA plan

HHI:

- 17%: \$100K-\$125K
- 16%: \$150K+
- 16%: \$75K-\$100K
- 12%: \$50K-\$75K
- 11%: \$40K-<\$50K



About drinkcaffeine

drinkcaffeine is a healthcare-focused digital marketing firm based in Madison, CT that combines strategic insight, branded content, and digital platforms to achieve measurable results for clients. drinkcaffeine.com



About Great Blue

Great Blue is a research firm based in Glastonbury, CT that combines strategic agility and human insight to deliver quantitative and qualitative findings that validate decisions, optimize results, and prevent costly mistakes. greatblueresearch.com

The key questions

1. Do consumers think it's their responsibility to self-educate about health problems?

89% say yes. A strong majority accepts personal responsibility for understanding their condition.

"If I have a health problem, it's my responsibility to learn about it."

Strongly Agree: 31.1%

Agree: 57.9%

Disagree: 7.0%

Strongly Disagree: 2.6%

Don't Know: 1.3%

If consumers are willing to self-educate, healthcare providers should provide a healthcare education. While the internet remains a ready tool for researching health issues, consumers still trust their local healthcare providers more than Dr. Google. Healthcare delivery needs to deliver information in addition to actual care.

For consideration:

Self-tutorial webinars

Healthcare practices of any size (and any area of medicine) can isolate the health conditions of its patient base and begin developing a deck of content aimed at empowering them with information. Simple downloadable webinars can be produced, archived, and accessed as needed.

Develop a content deck that empowers patients with information.

2. Who is supposed to coordinate healthcare?

Almost 36% said “Not me.” The statement we tested:

“If I have a serious/complicated health problem, it’s my responsibility to make sure the care I receive is coordinated.”

Strongly Agree: 23.2%

Agree: 38.7%

Disagree: 28.8%

Strongly Disagree: 7.0%

Don’t Know: 4.3%

The water’s edge of responsibility for consumers is coordination. While a clear majority of respondents (60%+) perceived coordination as their responsibility, more than one third did not. The consumer experience of healthcare is one of intense fragmentation. Care delivery is one universe of professional services, medical billing and insurance is another. Some services are coordinated, others are not. Patients don’t always understand where the thresholds of communication belong. Right or wrong, some (35.8%) believe they should not be expected to figure it out.

For consideration:

A Patient’s Bill of Responsibilities

No one’s health is guaranteed; we all know this. Optimal health is achieved when a set of shared responsibilities exists between every type of provider (clinical, administrative, financial) and the patient. Personal health is a form of equity that is earned, not given.

Therefore we think it’s within reason for health systems to define expectations of the patient for coordination of their care, and empower them with the information needed to participate in their health at the highest level. This may involve stronger Patient Advocate professionals who can promote the self-reliance to facilitate their own care.

Many consumers are willing to self educate – but not coordinate.

3. I'm sick. Who is responsible for making me better?

Around 70% of consumers say “my doctor.”

Respondents were asked to indicate the degree to which they agreed with this statement:

“If I have a health problem, my doctor is responsible for making me better.”

Strongly Agree: 11.9%

Agree: 57.3%

Disagree: 24.5%

Strongly Disagree: 2.3%

Don't Know: 4.0%

But almost 25% don't view the doctor as bearing responsibility. Again, this may be indicative of the shift in consumer perceptions surrounding healthcare responsibility. Nearly 90% say it's their job to self-educate regarding their health. And 25% acknowledge that their doctor cannot be held accountable for improving the patient's condition. This opens a door for healthcare decision makers to redefine responsibilities for achieving improved health.

For consideration:

The Primary Care Health Coach

Health coaching is not a new idea. But the idea has not been executed at the level where it matters most: at the point of care. Tools like MyChart (one of whose functions is to create a more direct exchange between provider and patient) are signaling movement in this direction, but the idea of shared responsibility must be affirmed more definitively.

We suggest the development of online and in-person Health Coaches at the primary care level. Their job would to provide guidance on how to access, coordinate, qualify for and pay for the care they need to achieve optimal health. Primary Care Health Coaches would in effect bring the patient to a higher level of engagement and responsibility.

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4. My health insurance should be the one to make sure I get the right care

More than 55% say yes. And nearly 20% feel strongly about the issue.

“If I have a health problem, it’s the responsibility of my health plan/insurance carrier to make sure I receive the right care.”

Strongly Agree: 19.2%

Agree: 36.4%

Disagree: 34.1%

Strongly Disagree: 7.3%

Don’t Know: 3.0%

Right or wrong, insurance is perceived as responsible for care delivery. Consumers seem to have learned that without insurance coverage, adequate healthcare delivery cannot occur – because the costs of paying out of pocket for health services are often catastrophic to a household economy.

But instead of viewing the insurer as the manager of a health network, many consumers think insurers (public and private) are responsible for the delivery of an agreed-upon service: Receiving “the right care.” This helps explain the confusion consumers have about where boundaries and responsibilities reside.

For consideration: Research and segment health insurance value

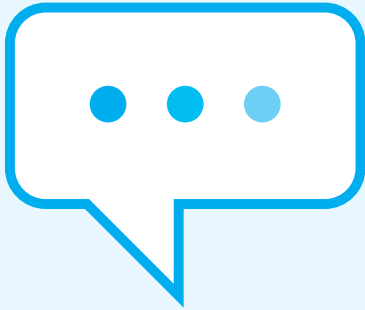
Medicare for All and movement toward a single-payer system is not going to happen anytime soon. Employer-sponsored and

individual insurance plans will continue to play a pivotal role in healthcare. The question is, in what direction will the health insurance industry pivot?

As recently as 2017, 70% of consumers believed health insurance companies were “largely” or “fully” trustworthy (Statista/Consumer & Business Insights 2017). Insurers should not ignore the goodwill that exists. They should do research that asks and answers questions such as:

- What are the most valuable nonmedical functions a health insurance company performs for its members?
- How do policyholders perceive their health insurer’s purpose, value, and identity?
- What are the areas of health insurance literacy policyholders need to know about?

Instead of viewing the insurer as the architect and manager of a health network, many consumers think insurers (public and private) are responsible for the delivery of an agreed-upon service: Receiving “the right care.”



To be continued

The steady pressure of consumerism entering healthcare is opening opportunities for healthcare decision makers to redefine responsibilities for individual health.

The competitive advantages will belong to healthcare

organizations that meet the patient as a consumer and empower that person's path to improved health with information, support, and expectations of engagement.

Healthcare decision makers, it's your move.

To discuss these findings further, reach out to billm@drinkcaffeine.com



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