

COLLABORATION HEALTH CARE

BRINGING IDEAS, BUSINESSES, AND PEOPLE TOGETHER
TO IMPROVE THE HEALTH CARE EXPERIENCE



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Is Health Care Really Listening?

In 2007 the Deloitte Center for Health Solutions began publishing a “snapshot” of the health care consumer. They have published an updated picture each year and we have them all posted in our Library. Our August, 2008 Newsletter provided a brief summary of the initial results and ended with the following statements:

- *Health care is a consumer market*
- *The consumer market is not homogeneous*
- *Consumers want to make their own decisions and want the tools to help them*
- *Consumers are embracing innovations that are “disruptive” to stakeholders who provide traditional health services and health plans*

We have been through a lot over the past three years in health care. The term consumerism, retail consumer, patient-centered, transparency, and individual responsibility has been bantered about for quite some time now. Consumers are operating different than in the past not only in health care, but in all other industries as well. Through it all, we’ve watched as the health care system has tried to adjust to both the changes of reform as well to the changes taking place as a result of our broader economic picture.

Despite all of the information that is now available, the health care system continues to focus its efforts from the top down (defining what is best for the consumer) as opposed to really listening to what the individual participant, the individual consumer has to say. Listening to the consumer is the real key to engagement.

We thought it would be interesting to take some of the information already available from a number of different sources and see if we could craft a letter to the health care system that accurately represents the views of the 2010 health care consumer. We wonder if the health care system has heard or is even capable of responding the way other consumer markets do. Remember, until the consumer is on-board and engaged we’re going to have a difficult time digging out of the mess we’re in today.

It may be time to listen a little harder.

A Letter from the 2010 Health Care Consumers

May, 2010

Dear Health Plan, Health Care Provider, Government, Employer (and everyone else who is involved in our health care)

We would first like to thank you all for an entertaining year. Whether you intended for it to happen or not, we are all much more aware of the problems facing our health care system. The Town Hall meetings last summer were eventful and emotional and watching how our legislative process works was equally as entertaining. We just hope we’re now on the right track.

While we may have just started the journey to “reform” the system we have today and we hear the term “patient-centered” frequently in the discussions, we

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A Report of Findings 2010 Deloitte Center for Health Solutions Consumer Survey

The following are the primary findings of the 2010 Deloitte health care consumer survey. We’re going to need to keep them at the front of our thinking if we’re going to get them engaged.

1. Consumers are generally satisfied with the doctors, hospitals, and insurance plans they use, but tend to be critical of the system overall.
2. When making health care decisions, most consumers rely on perceptions of service, reputation, and costs.
3. The contrast between the consumer’s belief that the US health care system is flawed and their satisfaction with its services is understandable if one concludes that most consumers do not have access or the ability to interpret meaningful quality metrics.
4. Consumers understand the concepts of wellness, healthy lifestyles, and the correlation between health problems, prevention, and costs.
5. Consumers believe that everyone should have insurance and someone else should pay the bill.
6. Uninsured consumer’s price sensitivity demonstrates the impact of rising costs.

We’d love to hear from you. Let us know your thoughts, your feedback, and other ideas.

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Letter from 2010 Health Care Consumers (con't)

continue to wonder if you have really listened to who we are and what we're all about. So, we thought we would provide you with a synopsis of who we are, where we're at, and what we really need to become more engaged.

About The Health Care System Itself:

By witnessing the events of the past 13 months we understand we need to change the way we have been operating in health care. A large number of us believe the system performs poorly, is wasteful, and much too expensive. We are concerned with the impact health care is having on the deficit of our country and many of us are concerned a medical event will wipe out any savings we may have put aside. Many of us are foregoing care simply because of the costs. We know this is only going to contribute to health care costs down the line, but we need to deal with the realities of the economics we're facing today.

We're generally split in our opinions for the need for government involvement especially when most believe (from watching the events of the past 13 months) that our policymaking process is broken. But, we understand we need more competition from somewhere to counter the higher costs we are facing and will continue to face in the future. Most of us think we understand the impact of the health reform legislation but we really don't. We know our views have been influenced by the "talking points" on all sides and we're continuing to learn as we go along. We're going to need to become more educated in how all of this works now and how it is supposed to work in the future.

Unfortunately, we have a huge lack of trust in the system we have today. We will tend to look to medical associations and academic medical centers before we would consider looking to health plans, pharmaceutical/ medical device manufacturers or even employers when we need help in navigating through the system we have today. We aren't going to get engaged until we have some level of trust in the people we're engaging with. This is going to be a huge challenge to overcome.

Our Roles in Health/Wellness/Personal Accountability

We've heard the message for our need to take more personal accountability in our health. Most of us think we're in exceptional health while at the same time over half of us have been diagnosed with a chronic condition. Some of us are starting to become involved with a wellness or health promotion plan but we certainly aren't there yet. Some of us are participating in the programs that are now being offered, but we certainly are not engaged. They are two separate items.

Our Health Care and Health Insurance

Just over half of us are satisfied with the health insurance we have- but most of us still don't understand it. This is especially true for the younger individuals. So, we have a lack of trust and a system we don't understand (not a good recipe to get engaged). We view our health insurance as more of a commodity than anything. There isn't much difference between the plans we're offered except the cost. Our brand loyalty doesn't run very high with health insurance companies. And, I'll follow along with the ritual of open enrollment and switch plans if I can get a better price.

Most of us have a primary care physician. But, we aren't necessarily locked to who we're using today. We will make changes when our insurance changes or when we don't like the service we receive. It just seems our physicians don't spend the time that we would like them to spend to manage our health- so we'll move when we have to. As long as the health care provider participates in whatever insurance plan we have at the time, we'll change providers as well.

We have the same feelings about the hospitals we use. We'll generally go where we're directed, but it will need to be reimbursed by our insurance. We'll try to go elsewhere if its not.

Over 85% of us are using some health care products on a regular basis. Many are using vitamins and supplements and nearly 60% of us are taking some prescription medication. Yes, the advertisements placed by the pharmaceutical companies do work. So, you can expect us to be asking a lot more questions and requesting specific products more than in the past. We're open to switching to generics from

brand name prescriptions but we simply need to understand the reasons and possible side-effects involved. The health care system could do well by improving this communication with us.

We're using the retail clinics a little more and we're only starting to understand the benefits of using a Personal Health Record. Anything that can simplify the poor efficiency we've experienced to-date will be appreciated. But, please make it easy to use and make sure I only have to do it once. As you already know, most of us already use the internet for our own research on health issues. Whether right or wrong, the internet has become a primary source of information due to the sometimes conflicting information we receive from inside the system itself.

We're spending almost \$34 billion out of our own pockets on complementary and alternative (CAM) services. Most of this is spent on "self-care" services (supplements and classes) but some of us continue to use CAM practitioners for treatment- and most of the time we still don't tell our medical doctor. Many times, our medical doctors don't even ask. Quite honestly, we don't know why traditional medicine and CAM don't work more closely together. Aren't we all playing for the same team here? We know health care is expensive and especially since we're paying more of the bill we're going to continue to look for lower cost alternatives even when the system doesn't tell us about them. We think you should be looking at all options as well.

In Summary

We hope you understand that we are more than willing to become more active participants in our health and the health care system itself. Please keep in mind that it wasn't very long ago when the health care system preferred we weren't involved at all (remember the initial HMO days?). Some of you would still prefer we not be as active as we would like but now you are asking us to play our roles and do our part. You might have to be patient. All we are asking for is a system that doesn't only focus on itself, one we can afford, one we can start to understand, and the tools and resources we can trust to help. We'll be with you all the way.

Sincerely,

The 2010 Health Care Consumer

Sources: 2010 Survey of Health Care Consumers; Deloitte Center For Health Solutions
Kaiser Tracking Poll; March, 2010; Kaiser Family Foundation
Costs of Complementary and Alternative Medicine; 2007; CDC;
National Center for Health Statistics

Something to Think About

"The most basic of all human needs is the need to understand and be understood. The best way to understand people is to listen to them."

Ralph Nichols

"Without credible communication, and a lot of it, the hearts and minds of others are never captured."

John P. Kotter

Continued Next Column