What's Trending Now: New Survey Reveals Common Ground — and Big Gaps — between Patient and Provider Outlook on Healthcare

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McLean, Virginia – As healthcare in America continues to dominate headlines and policy debates, a new survey released today by Booz Allen Hamilton (NYSE: BAH) and Ipsos Public Affairs examines what people at the center of the issues are thinking and feeling about the future of healthcare. In a rare collection and comparison of views from both consumers and healthcare providers, the study entitled "How We View Health Care in America: Consumer and Provider Perspectives," brought to you by Booz Allen Hamilton, in partnership with Ipsos Public Affairs, detects anxiety about the future, examines issues around controlling and reducing healthcare costs and investigates the role of technology and social media for consumers and providers.

Booz Allen and Ipsos Public Affairs distilled their findings in a short animated whiteboard video and will discuss them in greater detail in a Webcast today. To view the video, please visit www.boozallen.com/healthcarestudy. To join the Webcast, please visit the event site to register. There is no fee for participation.

"This study was initiated to shed light on a basic issue: how consumers and providers perceive the future of healthcare," says Grant McLaughlin, vice president at Booz Allen. To understand that issue, Booz Allen and Ipsos Public Affairs fielded a survey in August 2014 to 1,000 consumers and 400 primary care providers, specialists and administrators. "What we found illustrates that both common ground and major gaps exist, calling for further examination," McLaughlin adds. "We'll conduct the survey annually to stay abreast of these trends."

Survey findings reveal that only one-third of consumers (33%) and administrators (34%) think that the healthcare system is on the right track, while just one-quarter of primary care physicians (24%) and one in 10 specialists (10%) share that view. The report also details:

— **Viability of practice:** Two-thirds of providers (67%) are satisfied with their current practice, although fewer (61%) believe that their organization is well positioned to succeed in a changing healthcare environment. They feel least prepared to participate in risk-sharing arrangements.
— **Controlling costs:** All of the healthcare provider groups agree that controlling and reducing costs is essential, but they disagree on how to get there. More specialists (68%) cite tort reform, while prevention is seen as most promising for primary care doctors (61%) and administrators (76%). And while administrators are top advocates of prevention, they also embrace many emerging practices in which physicians place little confidence. These include technology (66%), telemedicine (55%),

accountable care organizations (57%) and patient-centered medical homes (56%).

— **The App Gap:** Two in five consumers (39%) who have used a mobile app to manage their health in the past 6 months say that it was their healthcare provider that recommended these apps for them. While seven in ten consumers (71%) own a smart phone or tablet, only 22% of them use their devices to manage their healthcare or insurance. Exercise monitoring apps are the most commonly used by consumers who have recently used a mobile app to manage their health (59%), while smoking cessation apps (20%) are least likely to be used.

Nicolas Boyon, senior vice president with Ipsos Public Affairs and director of this study, said, "Ipsos is pleased to partner with Booz Allen Hamilton on this unique comparison of patient and provider attitudes on the state of America's healthcare. We believe that the results from this study will provide real and immediate value to healthcare leaders wanting to better understand the quickly evolving healthcare issues and trends from both an access and delivery perspective."

For the consumer survey, online interviews were conducted with 1,000 U.S. adults, aged 18 and older, August 8-12, 2014. The data were weighted according to U.S. Census population statistics by gender, age, region, and household income. Precision of online polls is measured using a credibility interval. In this case, the consumer survey has a 95 percent credibility interval of ± 3.5 percentage points. For the provider survey, online *interviews were conducted August 10-18, 2014 with a total of 400 U.S. health care providers, including 100 primary care providers (PCPs), 200 specialists currently practicing in or out of a hospital setting, and 100 health system and hospital administrators. The data from physicians (PCPs and specialists) were weighted to reflect the current balance of primary care vs. specialist physicians practicing in the U.S. health care system. Statistical margins of error are not applicable to online polls due to non-response and coverage bias inherent to online panels. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error.*

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