

New Report Outlines Consumer and Physician Perspectives on Healthcare: Findings Signal Need to Address Challenges in Healthcare Access, Coordination, and Technology Integration

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New Report Outlines Consumer and Physician Perspectives on Healthcare: Findings Signal Need to Address Challenges in Healthcare Access, Coordination, and Technology Integration

McLean, Virginia – The majority of patients, primary care physicians, specialists, and administrators still do not believe that the U.S. healthcare system is on the right track. However, there is growing optimism among certain subgroups such as younger physicians and administrators. A new report released today by Booz Allen Hamilton (NYSE: BAH) and Ipsos Public Affairs, “How We View Health Care in America: Consumer and Provider Perspectives,” assesses the current state of and outlook for healthcare by examining the opinions of healthcare consumers and providers.

Kevin Vigilante, Booz Allen Senior Vice President and Chief Medical Officer, says, “More than five years into healthcare reform, it’s clear that perceptions among those who receive, deliver, and manage care are shifting. This report offers insight into levels of satisfaction with services, prevention, and use of technology to manage health.”

The survey, conducted annually, includes responses from more than 1,000 U.S. adults and over 400 healthcare providers. The data collected suggests that while providing consumers with access to top-quality care at a reasonable cost may be the overarching goal of the U.S. healthcare system, groups responsible for making

that a reality see the future differently and often have their own priorities to address within that larger context.

Key findings within the report include:

- **Consumer Healthcare Satisfaction Linked to Access:** The majority of consumers (67%) are currently satisfied with their personal healthcare. The lowest levels of satisfaction are seen among those who are underinsured (32%), have no personal doctor (33%), or have not visited one (29%). Satisfaction levels reflect the type of insurance coverage consumers have, with highest levels of satisfaction among Medicare recipients and those who see a physician and/or visit a specialist frequently.
- **Concerns for Healthcare Abound, but Optimism is Gaining Ground:** Of those charged with providing healthcare, health administrators and managers have become more optimistic at 43 percent believing that the healthcare system is headed in the right direction, compared to 34 percent in 2014. The outlook among specialists also became slightly more positive with 16 percent agreeing that the healthcare system is on the right track compared to just 10 percent in 2014, while 24 percent of primary care physicians share this view (unchanged from 2014).
- **Physicians and Healthcare Administrators/Managers Differ on Prospects for Health Care:** The outlook of administrators is far less bleak than that of physicians on several topics. For example, while more than four out of five (83

percent) of physicians think doctors are rapidly losing autonomy, only about half (51 percent) of administrators share that view.

- **Information Sharing Accepted for Better Care:** Consumers (52%) and providers (72%) agree that better coordination of care between multiple providers can have a significant impact on healthcare. While concerns about information security exist, more than half (58%) of consumers approve of their doctors sharing their personal health information (PHI) to better coordinate and manage their care.
- **The App Gap, A Mix of Caution and Optimism:** Eight in ten consumers surveyed (79%) own a smart phone or tablet, but only 29% use a mobile app or personalized interactive website to monitor or manage their health. Not surprisingly, younger consumers more frequently adopt technology for healthcare when compared to older people, with two notable exceptions: all consumers access general health references at roughly the same rates, and those who are 65 years of age and older use technology to access prescription drug references more often (59%) than other age groups (40%). Additionally, there is a gender gap – men are more likely than women to use apps or interactive websites to access health information. Even with increasing use of technology, consumers continue to be concerned about the security of their personal health information.
- **Value of Prevention & Care Outcomes Overshadow Cost:** Perceptions about preventive interventions vary depending on age and other factors. Consumers



and providers alike see aggressive disease screening and greater coordination of care between healthcare providers as the most promising approaches.

- **A Shift Toward Patient-Centered Models:** The Patient-Centered Medical Home (PCMH) seeks to ensure that patients receive care when and where they need it by creating an active partnership between each patient, his or her family, and the provider team. Of the physicians surveyed for this report, one-third indicated that they were part of a PCMH (16%) or moving toward a PCMH model of care delivery (16%). Those who work in a patient-centered medical home are more optimistic about the current direction of health care than those who do not work in that environment.

Nicolas Boyon, Senior Vice President with Ipsos Public Affairs and director of this study, said, “Ipsos is pleased to partner with Booz Allen Hamilton again this year on this unique comparison of patient and provider attitudes on the state of America’s healthcare. While the study points to some clear trends across the data collected over the past two years, it also brings about new and interesting findings that may be valuable to healthcare leaders. We intend to continue to monitor sentiment and drive awareness to challenges and successes over time.”

For the consumer survey, responses for a sample of 1,003 adults, 18 years of age or older were collected online. The data was weighted according to U.S. Census population statistics by gender, age, region, and household income. The 401 respondents surveyed for the provider survey included 132 primary care providers, 169 specialists, and 100 health system and hospital administrators. The



physician data were weighted to reflect the current balance of primary care versus specialist physicians practicing in the U.S.

To see/download the full report, visit www.boozallen.com/healthcarestudy.

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For more information on this news release, please contact:

Nicolas Boyon
Senior Vice President
Ipsos Public Affairs
646-364-7583
nicolas.boyon@ipsos.com

Kimberly West
Booz Allen Hamilton
703-377-1403
west_kimberly@bah.com

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