The priority gap widens between healthcare providers and patients.

Patients’ attitudes regarding healthcare

When it comes to the uncertain future of the Affordable Care Act (ACA), rising healthcare costs and taking charge of personal health, patients and providers aren’t always aligned.
Patients’ healthcare concerns are not always aligned with providers’ perceptions.

Morar Consulting surveyed 500 patients (18+ years old) and 150 healthcare professionals about their views on the current state of healthcare in the United States.

The healthcare market is changing, costs are rising and patients’ priorities are shifting. Read about the gap between what concerns patients and what providers think concerns patients most.
Three eye-opening facts

Discover what patients had to say about the future of healthcare and maintaining a healthy lifestyle.

Patients worry about side effects more than cost
While increased healthcare costs are alarming for most Americans, side effects are the primary concern among patients.

Patients are not using many existing health-related technologies
Telemedicine, online portals and mobile health and fitness apps are available to patients, but they are less inclined to use them.

Bad habits are hard to break
The biggest obstacle preventing patients from taking charge of their health is lack of exercise.
Providers think patients worry about rising healthcare costs.

Patients are more concerned about side effects than increasing costs.

Patients & Providers agree that making prescription drugs more affordable is a top priority.
Bad habits: Discover the top reasons Americans are not taking charge of their health

Which bad habits are the most predominant among patients?

- **46%** Lack of exercise
- **40%** Poor eating habits
- **20%** Smoking

A greater percentage of providers than patients expressed concern over patients’ ongoing vices.

Click here to see more results
Health-related technologies: Which ones are patients using?

70% of patients are not familiar with telemedicine; however, the ones who are have a higher income.

60% of patients do not use any health or fitness apps,

51% of providers think they do.

37% of patients use patient portals.

86% of patients who use portals find it valuable.
Bad habits affecting health
Obstacles that hinder proper healthcare

What is the biggest thing standing in the way of you/your patients taking charge of your/their health?

- Bad habits
- It’s too expensive to be healthy
- They don’t worry about their health
- They think it’s too complicated and confusing
- Other (too busy, don’t know how to, lack access to relevant information about their health, don’t think they have the ability)

Overall (N=653)

- Bad habits: 26%
- It’s too expensive to be healthy: 10%
- They don’t worry about their health: 18%
- They think it’s too complicated and confusing: 25%
- Other: 10%

HCP (N=150)

- Bad habits: 28%
- It’s too expensive to be healthy: 19%
- They don’t worry about their health: 8%
- They think it’s too complicated and confusing: 15%
- Other: 8%

Consumers (N=503)

- Bad habits: 25%
- It’s too expensive to be healthy: 21%
- They don’t worry about their health: 21%
- They think it’s too complicated and confusing: 28%
- Other: 8%
Vices that affect good health

What bad habits stand in the way of you/your patients taking charge of your/their health?

<table>
<thead>
<tr>
<th>Habit</th>
<th>HCP</th>
<th>Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor eating habits</td>
<td>67%</td>
<td>40%</td>
</tr>
<tr>
<td>Lack of exercise</td>
<td>65%</td>
<td>46%</td>
</tr>
<tr>
<td>Delaying/not going at all to see doctor</td>
<td>59%</td>
<td>28%</td>
</tr>
<tr>
<td>Smoking</td>
<td>43%</td>
<td>32%</td>
</tr>
<tr>
<td>Not properly managing prescriptions</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Drinking</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>None of the above</td>
<td>5%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Healthcare cost concerns
The probability that patients consider provider costs

How likely are you/your patients to consider cost when selecting a healthcare provider?

- **Overall (N=653)**
  - Extremely likely: 57%
  - Likely: 29%
  - Neutral, Unlikely, Extremely unlikely: 14%

- **HCP (N=150)**
  - Extremely likely: 63%
  - Likely: 37%
  - Neutral, Unlikely, Extremely unlikely: 21%

- **Consumers (N=503)**
  - Extremely likely: 12%
  - Likely: 25%
  - Neutral, Unlikely, Extremely unlikely: 63%
Top concerns among patients

Which do you/think your patients believe should be the country's top healthcare priorities for 2017?

- Making prescription drugs more affordable: 61% (HCP) vs. 60% (Consumers)
- Protecting people with chronic and preexisting conditions from high costs of medical care: 49% (HCP) vs. 54% (Consumers)
- Price transparency (knowing ahead of time what things cost at the doctors, what insurance companies pay for services, etc.): 48% (HCP) vs. 50% (Consumers)
- Making telehealth more widely available for routine visits and follow-up appointments: 17% (HCP) vs. 23% (Consumers)
- More community-based programs that support various factors that influence my health: 24% (HCP) vs. 22% (Consumers)
- None of the above: 3% (HCP) vs. 3% (Consumers)
Cost considerations

What patients are asking

Which of the following questions have you asked your physician?/
Which of the following questions have your patients asked you?

<table>
<thead>
<tr>
<th>Question</th>
<th>HCP</th>
<th>Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will there be side effects?</td>
<td>53%</td>
<td>57%</td>
</tr>
<tr>
<td>How much does it cost?</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Do I really need this test or procedure?</td>
<td>50%</td>
<td>41%</td>
</tr>
<tr>
<td>Will my condition get worse or better if I don’t do anything right away?</td>
<td>52%</td>
<td>37%</td>
</tr>
<tr>
<td>Are there less expensive options?</td>
<td>43%</td>
<td>34%</td>
</tr>
<tr>
<td>What happens if I don’t do anything?</td>
<td>53%</td>
<td>33%</td>
</tr>
</tbody>
</table>
Cost can affect healthcare among patients

Have you ever delayed or not sought treatment from your healthcare provider because of cost? Do you think the typical patient has ever delayed or not sought treatment from a healthcare payer or provider because of cost?

<table>
<thead>
<tr>
<th>Segment</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
<th>Data is unavailable.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall (N=653)</td>
<td>57%</td>
<td>39%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>HCP (N=150)</td>
<td>85%</td>
<td>5%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Consumers (N=503)</td>
<td>48%</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Data is unavailable.
Patient/provider conversations about cost

Has your patient or their caregiver/your physician ever talked to you about healthcare costs?

Cost considerations

Overall (N=652)
- Yes: 45%
- No: 49%
- Unsure: 6%

HCP (N=150)
- Yes: 81%
- No: 15%
- Unsure: 3%

Consumers (N=502)
- Yes: 59%
- No: 34%
- Unsure: 7%
Patients’ understanding of their payments
Do you/your patients understand medical bills?

- Overall (N=653): 33% Yes, 67% No
- HCP (N=150): 68% Yes, 32% No
- Consumers (N=503): 22% Yes, 78% No
The knowledge and use of technology
Remote doctor visits in place of routine appointments

Have you/your patients or their caregivers ever used telehealth in place of or in addition to a routine visit and/or follow-up appointment?
Patients’ usage of mobile health and fitness apps

How many, if any, mobile health and fitness apps do you/you think your patients use to help manage health?
Patients’ use of apps and technology to improve health

Have you used/prescribed health-related apps and technology in place of or in addition to a routine visit and/or follow-up appointment with a care provider?
Patients’ knowledge of how technologies can help improve health

Are you/your patients familiar with health-related technology such as mobile apps and wearable tech and how they can be used to improve health?

% of Respondents

Overall (N=653) HCP (N=150) Consumers (N=503)

Yes | No | Unsure
---|---|---
71% | 63% | 73%
4% | 19% | 27%
25% | 18% | 4%

Segment

Click here to go back to the story
How many patients are using portals to communicate with their doctors

Do you/your patients use a patient portal?

<table>
<thead>
<tr>
<th>Segment</th>
<th>Yes</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall (N=653)</td>
<td>50%</td>
<td>40%</td>
<td>10%</td>
</tr>
<tr>
<td>HCP (N=150)</td>
<td>49%</td>
<td>33%</td>
<td>18%</td>
</tr>
<tr>
<td>Consumers (N=503)</td>
<td>37%</td>
<td>55%</td>
<td>8%</td>
</tr>
</tbody>
</table>
# The significance among patients of patient portals

Do you find it valuable?

<table>
<thead>
<tr>
<th>Segment</th>
<th>Overall (N=266)</th>
<th>HCP (N=74)</th>
<th>Consumers (N=192)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes (%)</td>
<td>83%</td>
<td>76%</td>
<td>86%</td>
</tr>
<tr>
<td>No (%)</td>
<td>12%</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>Don't know (%)</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Patients’ familiarity with remote diagnosis and treatment

Are you/your patients familiar with telemedicine?

<table>
<thead>
<tr>
<th>Segment</th>
<th>Yes</th>
<th>No</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall (N=653)</td>
<td>63%</td>
<td>30%</td>
<td>7%</td>
</tr>
<tr>
<td>HCP (N=150)</td>
<td>39%</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Consumers (N=503)</td>
<td>70%</td>
<td>30%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Technology
Patients’ interest in mobile health and fitness apps

How interested are you/your patients in using health-related technology for each of the following purposes?

- Maintaining a healthy lifestyle
- Getting emergency medical advice
- Monitoring my health conditions (e.g., chronic conditions like diabetes)
- Having routine exams
- Getting nonurgent medical advice

<table>
<thead>
<tr>
<th>Purpose</th>
<th>HCP</th>
<th>Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintaining a healthy lifestyle</td>
<td>36%</td>
<td>32%</td>
</tr>
<tr>
<td>Getting emergency medical advice</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Monitoring my health conditions</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>Having routine exams</td>
<td>11%</td>
<td>27%</td>
</tr>
<tr>
<td>Getting nonurgent medical advice</td>
<td>16%</td>
<td>25%</td>
</tr>
</tbody>
</table>
**Why patients are postponing care**

Have you ever delayed, or not sought care or treatment recommended by your physician for any of the following reasons? Which of the following do you think is a reason your patients have delayed or not sought care or treatment recommended?

- **Insurance wouldn’t approve care**
  - HCP: 57%
  - Consumers: 21%

- **Couldn’t get time off of work**
  - HCP: 46%
  - Consumers: 15%

- **Didn’t understand recommended treatment plan**
  - HCP: 45%
  - Consumers: 7%

- **Lack of transportation**
  - HCP: 44%
  - Consumers: 13%

- **Doctor didn’t accept insurance**
  - HCP: 35%
  - Consumers: 15%

- **Have scheduled, but it’s still months away**
  - HCP: 31%
  - Consumers: 16%

- **Couldn’t get childcare/adult care**
  - HCP: 31%
  - Consumers: 6%

- **Didn’t understand recommended treatment plan**
  - HCP: 45%
  - Consumers: 7%

- **Could get child care/adult care**
  - HCP: 8%
  - Consumers: 8%
About Conduent

Conduent is helping change the way the world works. By applying our expertise in imaging, business process, analytics, automation and user-centric insights, we engineer the flow of work to provide greater productivity, efficiency and personalization. We conduct business in 180 countries, and our more than 140,000 employees create meaningful innovations and provide business process services, printing equipment, software and solutions that make a real difference for our clients — and their customers.

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