



Wolters Kluwer
Health

Wolters Kluwer Health Quarterly Poll: Consumerization of Healthcare

New poll reveals consumers want more control of their own healthcare

Wolters Kluwer Health has new data from its latest quarterly poll probing the changes taking place in healthcare and the impact on both healthcare professionals and consumers at the point of care. This newest poll focuses on the topic of the “consumerization” of healthcare, or the trend of transforming patients into consumers and shifting more responsibility for care to the patient. Poll questions focus on whether consumers really want more control and if they feel prepared – and willing – to take on greater responsibility for their own healthcare.

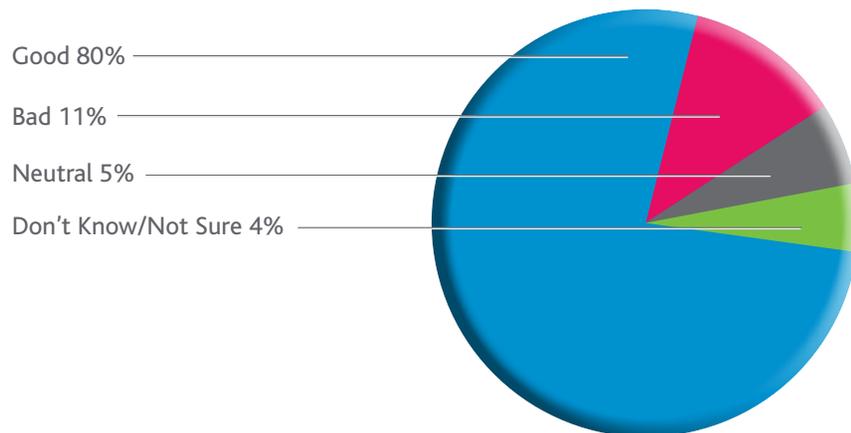
Survey methodology:

The Wolters Kluwer Health poll was a blind, telephone Omnibus survey conducted by IPSOS of 1,000 consumers in the U.S. ages 18 and older. Interviews were completed in November 2012. Data were weighted to ensure the sample’s regional and age/gender composition reflects that of the actual U.S. population according to data from the U.S. Census Bureau.

CONSUMERS BELIEVE THE “CONSUMERIZATION” OF HEALTHCARE IS GOOD FOR AMERICA

Consumers overwhelmingly believe that the trend of individuals taking a greater and more active role in their own healthcare is a positive thing for Americans. A full 80% feel that this trend is good while only 11% say it's bad for Americans.

Views on healthcare consumerization



Question: Is the 'consumerization' of healthcare – or the trend of having consumers take a much more active role in their own healthcare, including researching healthcare providers, conditions and treatment options to make decisions about their care – good or bad for Americans?

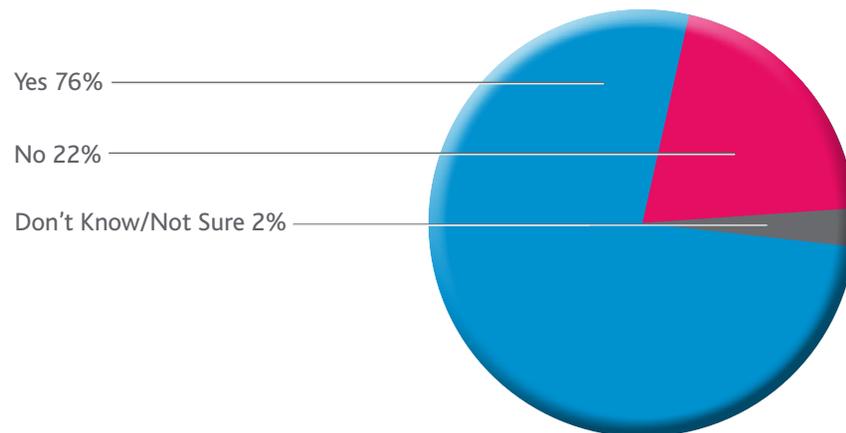
Fast Facts:

- 46% of consumers agree that "Taking control of my own healthcare makes me feel empowered and good about my quality of care"
- Women (85%) are more likely than men (74%) to believe the consumerization of healthcare is positive
- Three in ten adults (30%) want their patient experience to be the same as any other customer experience they have – such as shopping, hotel and travel experiences – complete with choices and control

CONSUMERS FEEL PREPARED TO MAKE THEIR OWN HEALTHCARE DECISIONS

Not only do consumers believe that greater control over their own healthcare is a positive trend, but they also feel prepared to take a more proactive role in making decisions about their care, from seeking out their own providers to researching treatment options.

Prepared to make proactive healthcare decisions



Question: Do you have the information and tools you need to take a more proactive role in making your own healthcare decisions (such as researching healthcare providers, conditions and treatment options to make decisions about your care, etc.)?

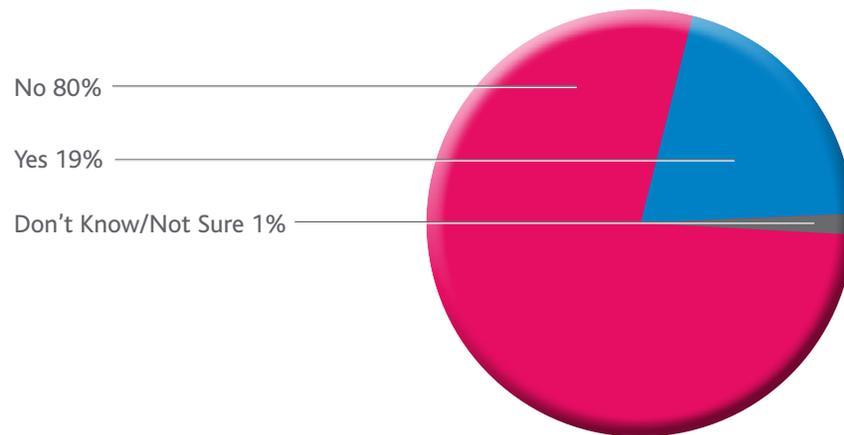
Fast Fact:

- More women (81%) than men (72%) feel that they have the information and tools to make their own healthcare decisions

DESPITE CONSUMERS' DESIRE FOR INCREASED CONTROL OF THEIR HEALTHCARE, PERSONAL HEALTH RECORD ADOPTION IS SLOW

A Personal Health Record (PHR) is a record with all of the information about an individual consumer's health that they keep in one place and update and maintain on their own for easy reference using a computer. Only one in five adults (19%) report that they have their own electronic PHR.

Percentage of consumers with an electronic PHR



Question: *Do you currently have your own electronic PHR?*

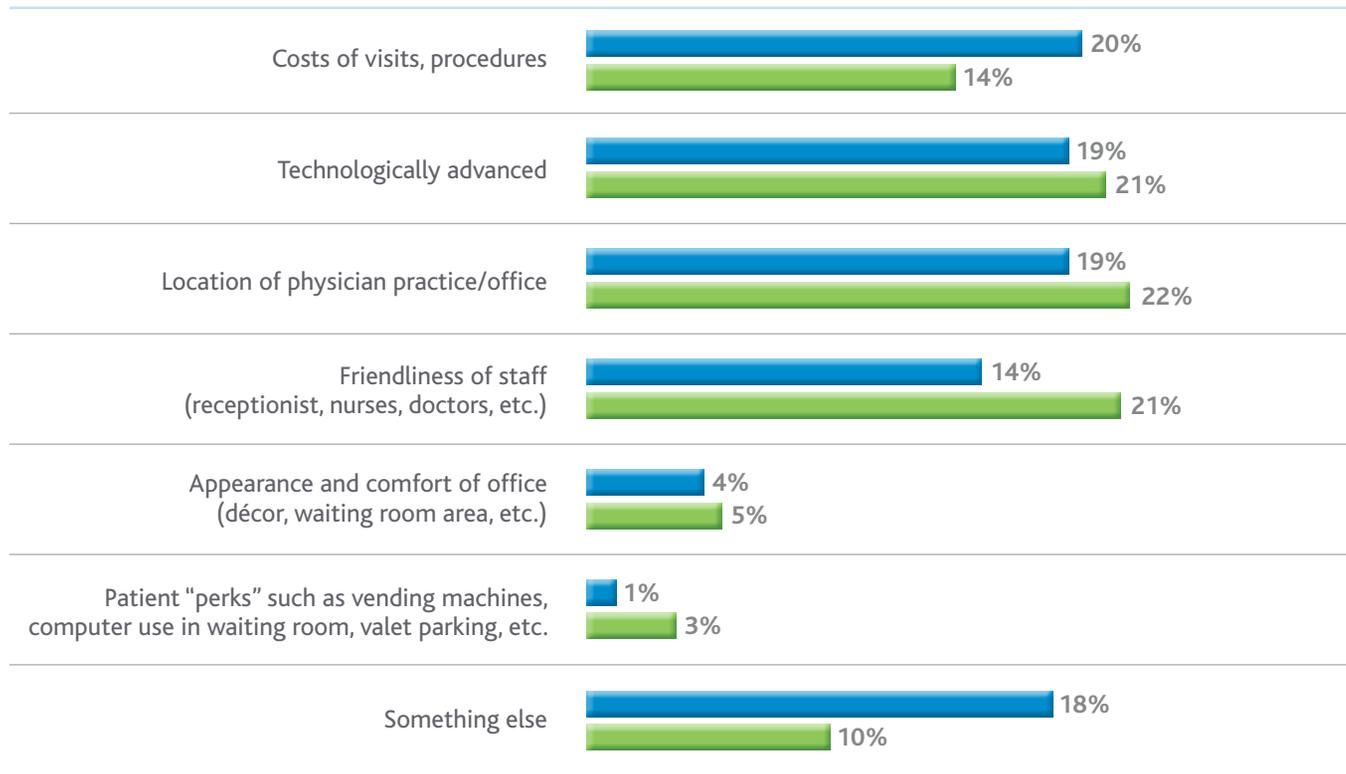
Fast Fact:

- Men (23%) are more likely than women (16%) to say that they have an electronic PHR

COSTS, TECHNOLOGY OPTIONS AND CONVENIENCE DRIVE PHYSICIAN CHOICES

With greater consumerization of healthcare, consumers will be expected to take a larger role in choosing their own healthcare providers. When asked about factors that drive their physician choices, assuming that experience levels and care reputations are similar, costs of visits and procedures, the ability to communicate with doctors and nurses via email and schedule appointments online, location of offices and friendliness of staff all ranked high.

Factors that drive physician choices



Question: When you choose a physician (primary or specialists), assuming that their experience levels and care reputations are the same, what is the most important factor in making your selection? What is the second most important?

■ Most Important Factor
■ Second Most Important Factor

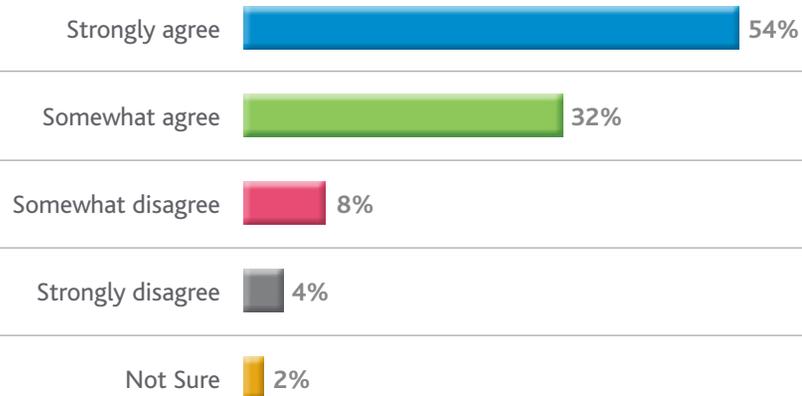
Technologically advanced includes:

- Ability to communicate via email with doctor or nurse
- Ability to schedule appointments online
- Use of mobile devices or computers in office visits

CONSUMERS BELIEVE PROACTIVITY IS CRUCIAL TO ENSURE QUALITY OF CARE

A full 86% of consumers agree that they must take a proactive role in managing their own healthcare in order to ensure better quality of care.

Consumers who believe proactive management of care is critical



Question: Please indicate how much you agree or disagree with the following statement: *I feel that I have to take a more proactive role in managing my own healthcare to ensure better quality of my care.*

Fast Facts:

- More women (59%) than men (50%) strongly agree that they need to take a more proactive role in managing their care to ensure quality
- Consumers ages 35-54 (60%) are the most likely to feel they need to be more proactive, with those ages 55+ (56%) coming in second