

What Do Consumers Want and How Do We Get There?

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A photograph of a woman and a young boy sitting together outdoors. The woman, wearing a black baseball cap and a white tank top, is smiling and has her arms around the boy. The boy, wearing an orange t-shirt, is also smiling. A blue wristband is visible on the woman's left wrist, and a pink object is in her right hand. The background is a blurred outdoor setting.

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What is a Culture of Health?





— Transforming Health and Health Care Systems —



The background of the slide features a series of diagonal stripes in two shades of green, creating a dynamic, layered effect. The stripes run from the top-left towards the bottom-right.

Understanding perceptions, needs, and preferences

Right Place, Right Time

IMPROVING ACCESS TO HEALTH CARE INFORMATION
FOR VULNERABLE PATIENTS

Consumer Perspectives



Goals:

- Understand how and when health information sources are used
- Understand satisfaction or dissatisfaction with existing sources
- Identify any unmet needs

Priority populations:

- Low-income / Uninsured
- Non-English Speakers
- Caregivers
- 4,068 consumer survey responses across income status, insurance status and language
- Focus groups with 51 consumers in 5 sessions across 3 geographies
- 14 interviews/ethnographies
- Review of academic / “grey” literature

What have we learned?

- **What do people want?**
- **What are the barriers?**
- **Why does this matter?**



What do people want?



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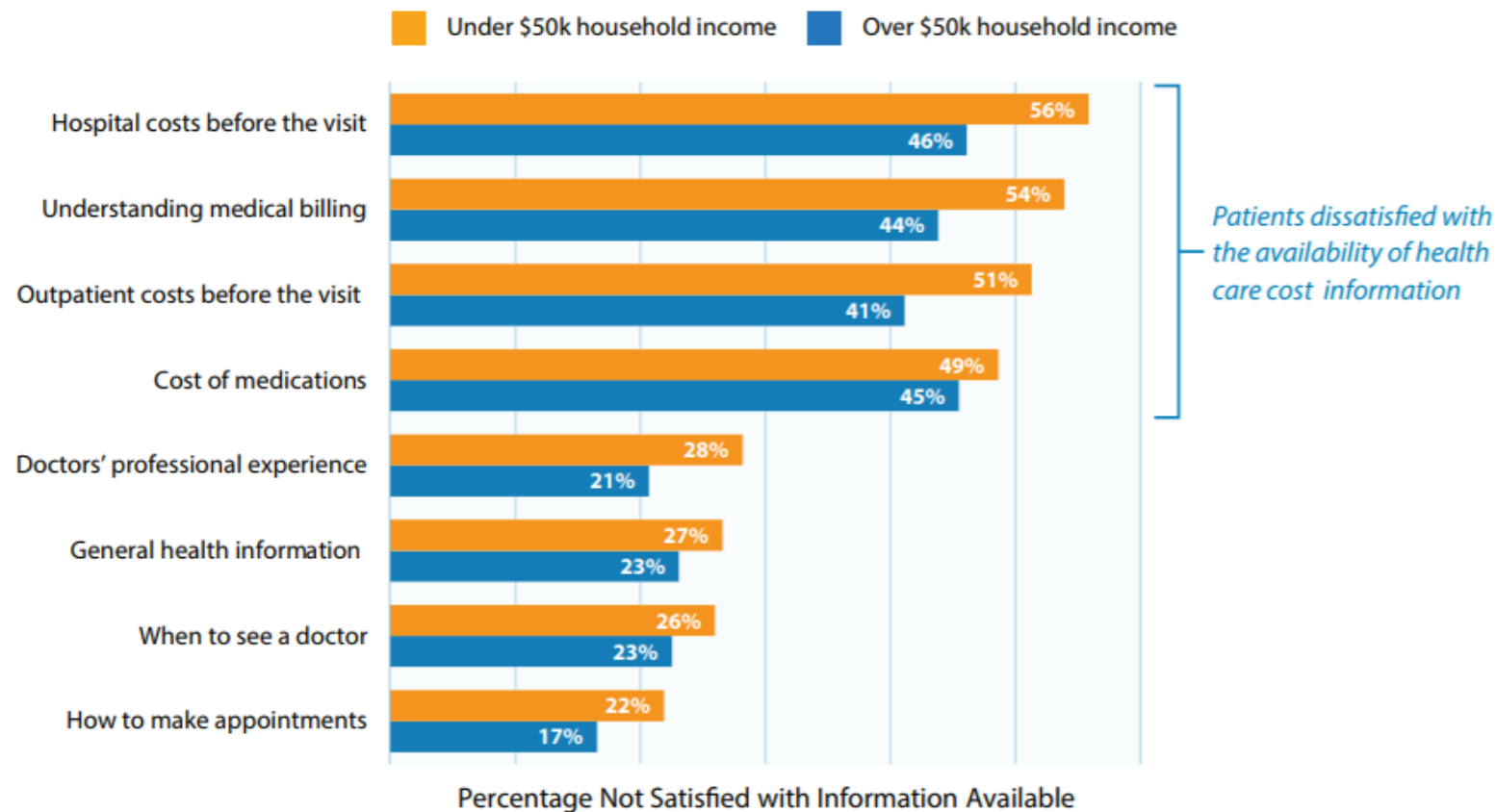
Information about cost

50% of Americans have tried to find cost information before care

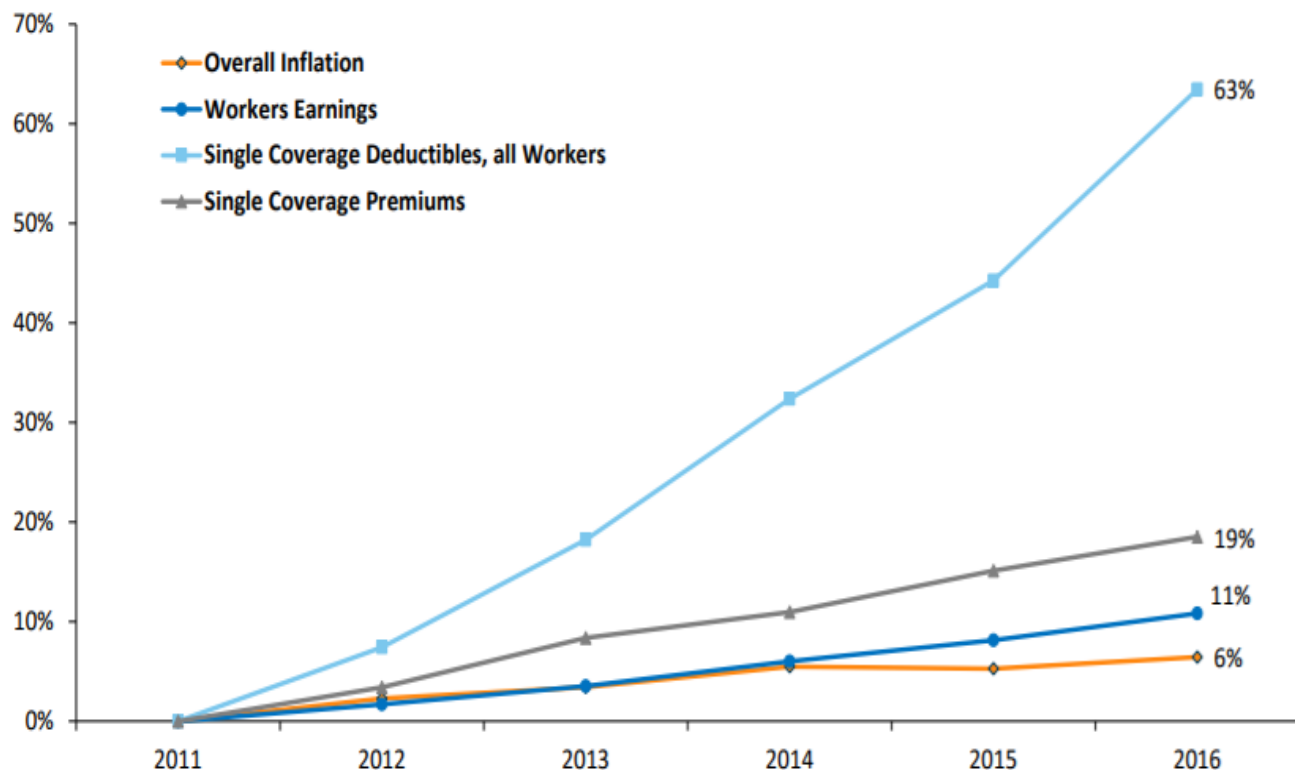
People with high deductibles, previously uninsured, are more likely to seek cost info



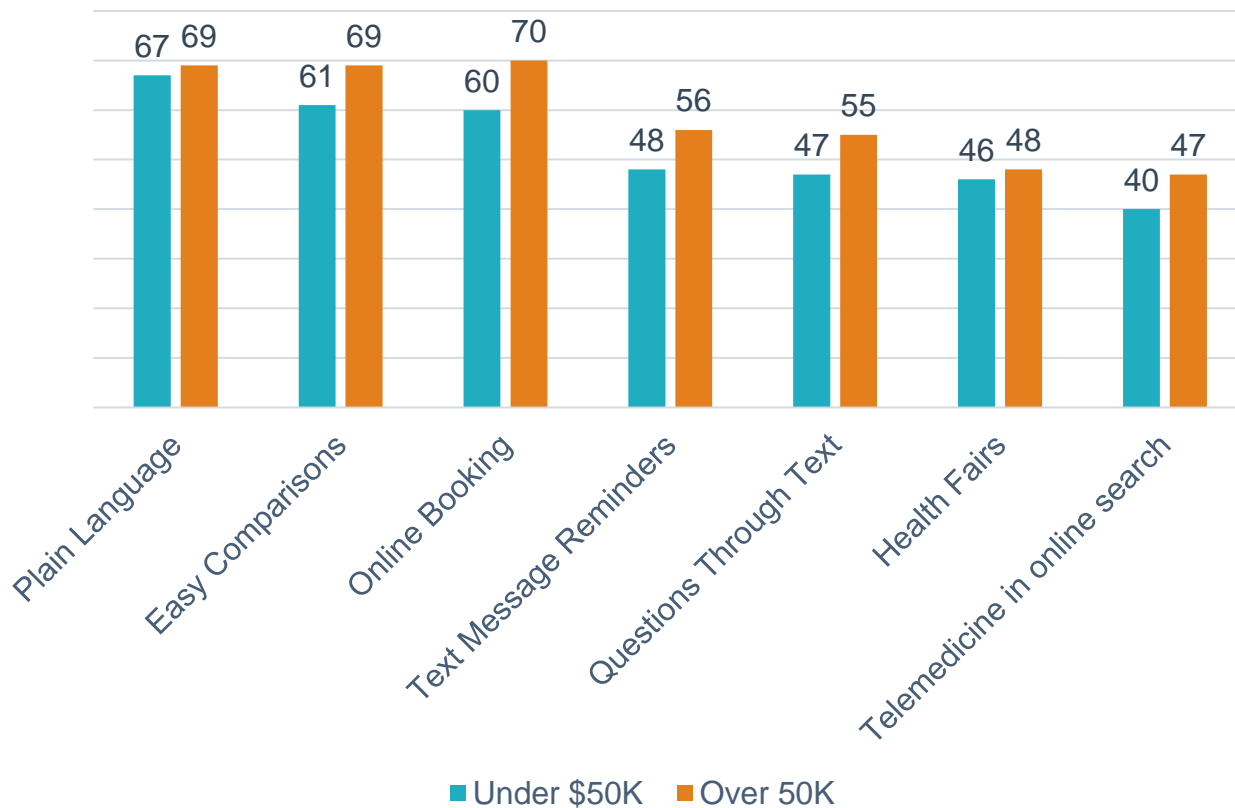
Consumers Most Dissatisfied with Availability of Cost Information



Cumulative Increases in Health Insurance Premiums, General Annual Deductibles, Inflation, and Workers' Earnings, 2011-2016



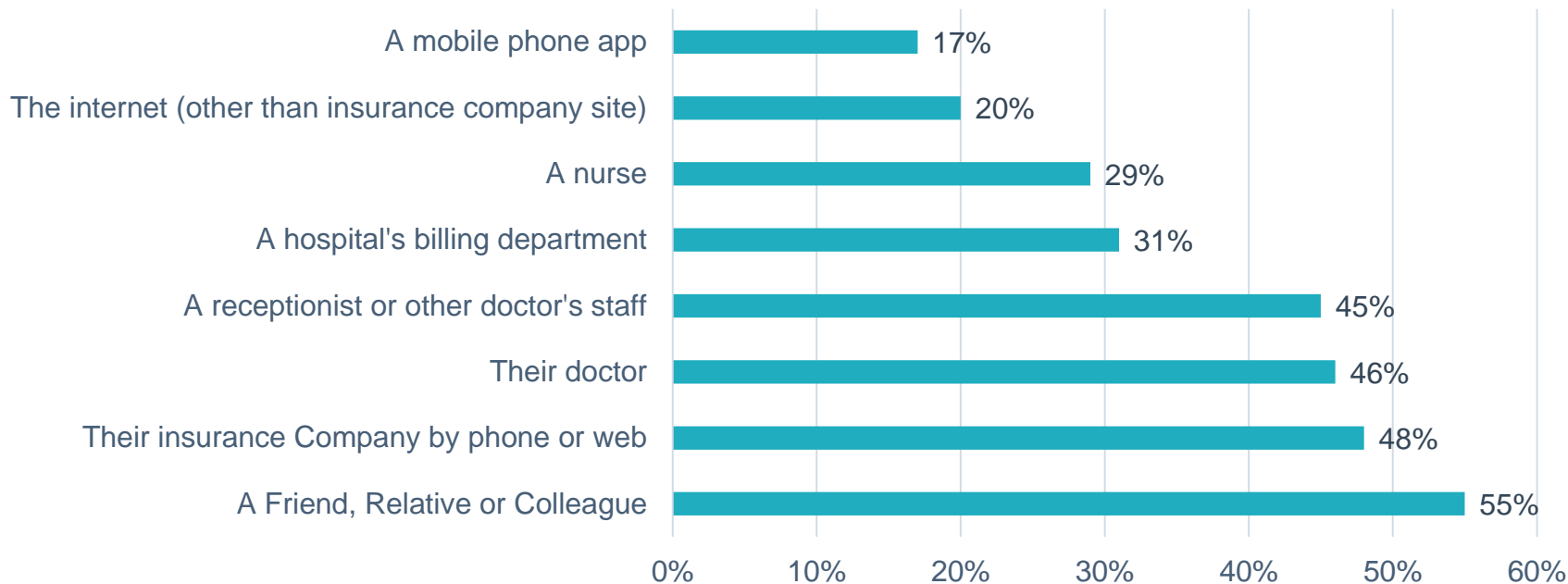
What services are most useful?



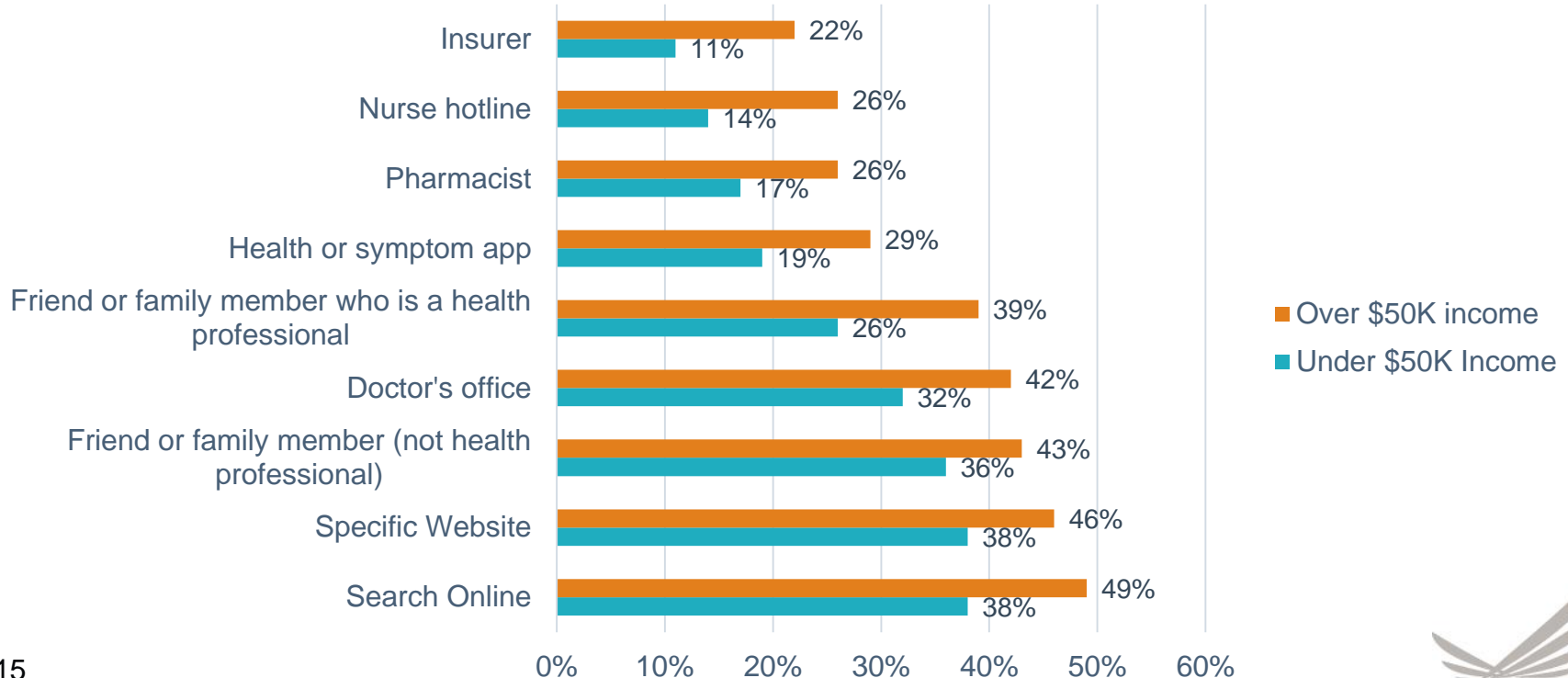
%
Rating
Service
Most
Useful



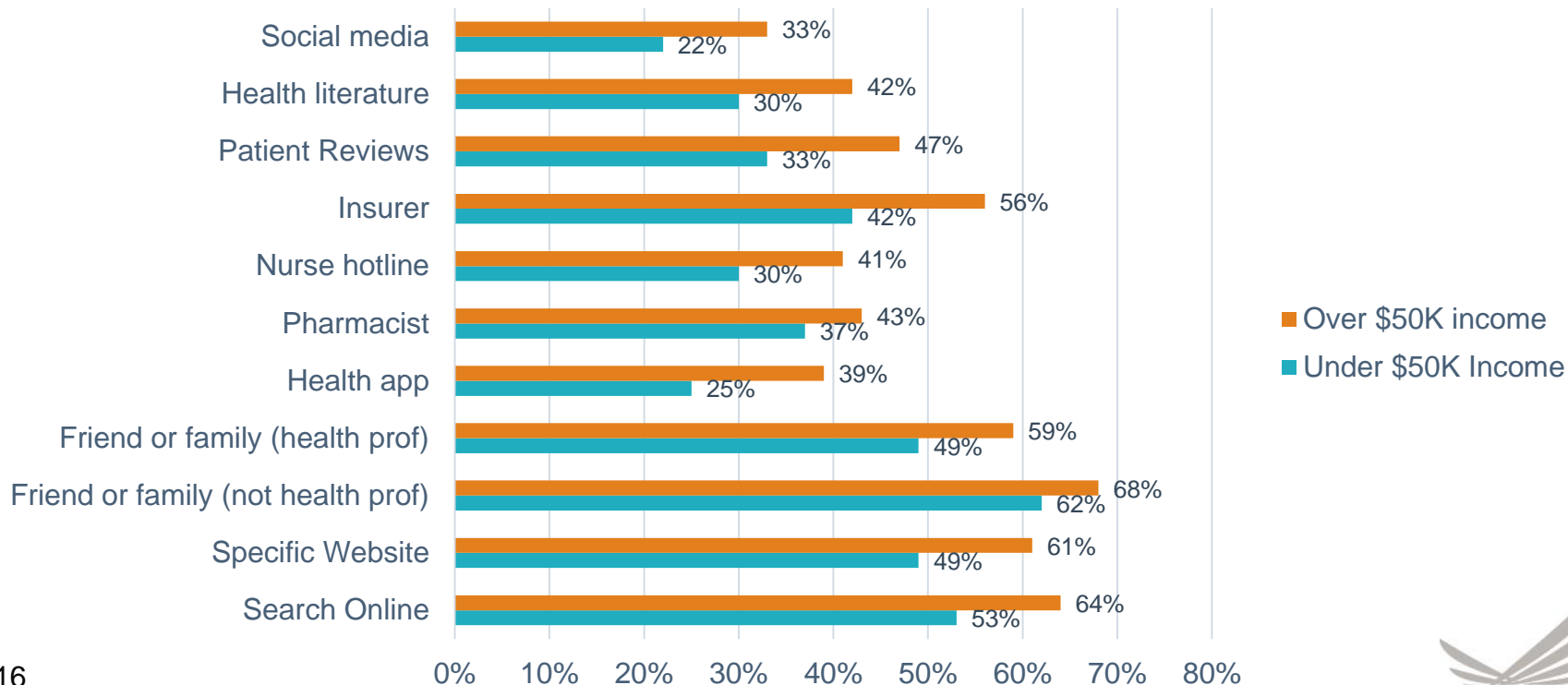
For cost: friend, provider, insurer



On whether to seek care: Dr. Google



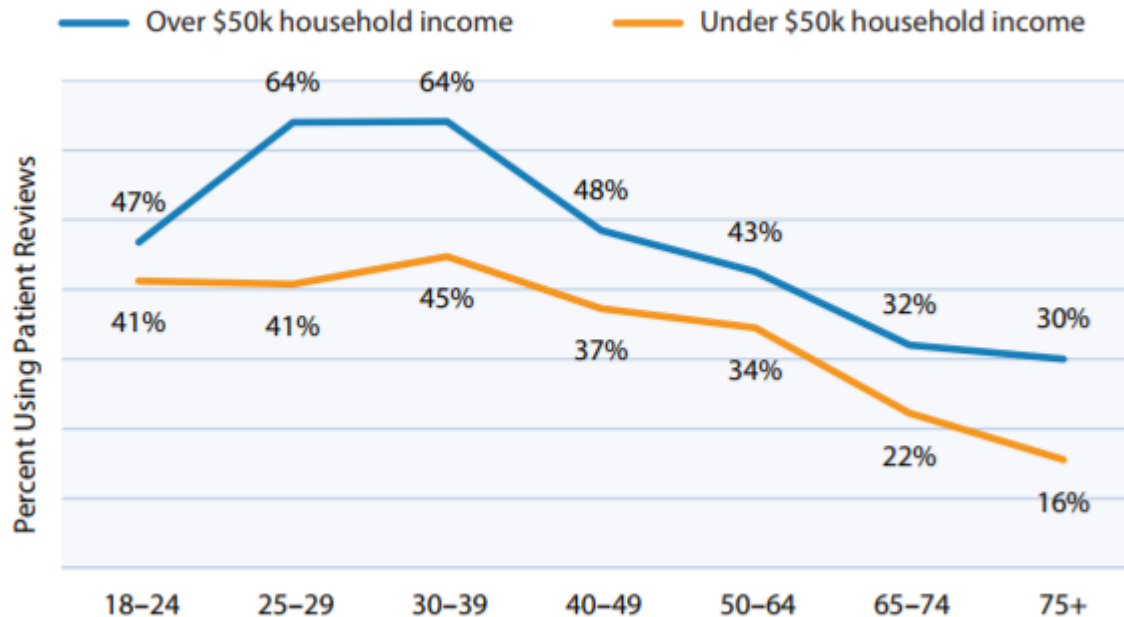
On where to seek care: Dr. Google and friend



People also look to alternative sources...



And patient reviews

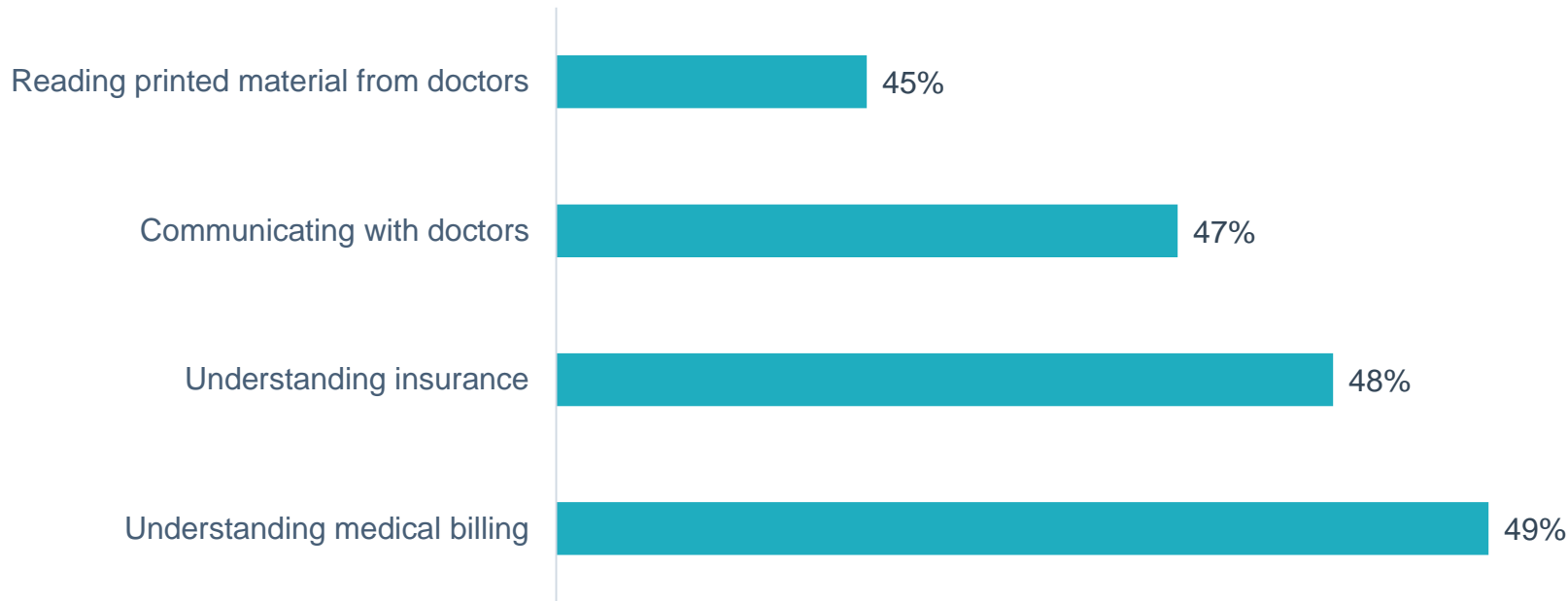


What are the barriers?



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Percent of Spanish speakers who felt that language was a barrier



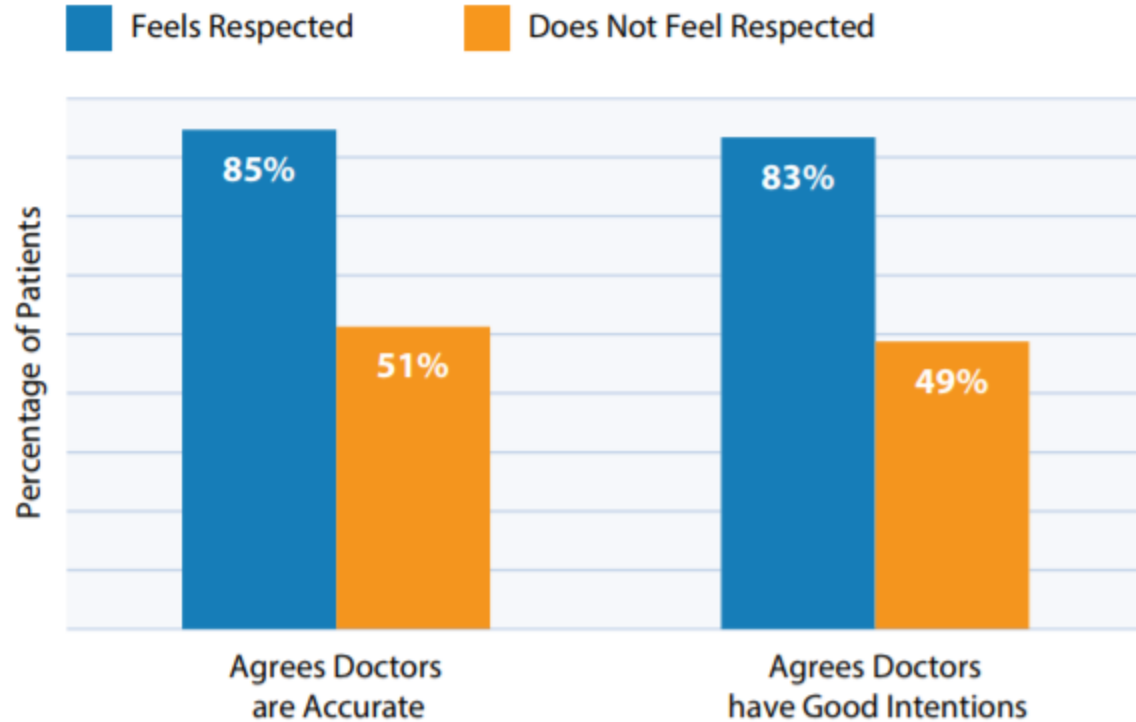
Feeling disrespected is a major issue

People who are uninsured, lower income significantly less likely to feel respected by providers

Lower income patients in poor health feel most disrespected



Feeling Disrespected Linked to Mistrusting Doctors as Information Sources



Why Does This Matter?



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Real Health Implications

People can't make good decisions for themselves without reliable information

Financial toxicity is a real issue

People don't follow guidance (non-adherence) when they don't trust it

People who are engaged in their care have better outcomes, lower cost



So What Can We Do?

What are we doing at the Foundation to address these issues?

Trying to better understand the trust and respect issues between providers and patients

Helping providers talk more about cost

Exploring what true patient centered measures would look like in health care- how to get people the information they need and center the system around it

Research on what consumers value in health care experiences

Using patient generated data to help patient/provider communication



What Can You Do?



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Resources

- Oliver Wyman/Altarum Institute: Right Place, Right Time
oliverwyman.com/RightPlaceRightTime.html
- Public Agenda: Still Searching
publicagenda.org/pages/still-searching
- Patient Advocate Foundation: Roadmap to Consumer Clarity: - npaf.org/roadmap/
- Finding Answers: Roadmap to Reducing Health Care Disparities - solvingdisparities.org/tools/roadmap
- Avalere Health: Studying how to bring cost conversations into the clinical encounter/ workflow - <http://bit.ly/2ij9JEd>