

Satisfied with health care, but not the health care system

Deloitte's 2012 Survey of U.S. Consumers shows most people feel better about the health care they receive than the system as a whole—and they're ready for more high-tech solutions.

THINGS THEY SEE



Enthusiasm for health reform is ebbing. From 2011 to 2012, those who called federal reform "a good start" lost ground to undecideds. Negative attitudes remained about the same.



62% say at least half the money spent on health care is wasted.



78% of respondents are not satisfied with the performance of the system.

35% say they are concerned with the privacy and security of electronic health records—Boomers more (39%), Millennials less (30%).



49% of consumers feel individual choices, like unhealthy lifestyles, are a major cause of wasteful spending. Fraud and abuse is the only cause they blame more (69%).

THINGS THEY TOUCH



Satisfaction with primary care providers is consistently high and has increased since 2008.

61% were satisfied with their recent retail clinic experiences.



26% used social media for health-related purposes in 2012.



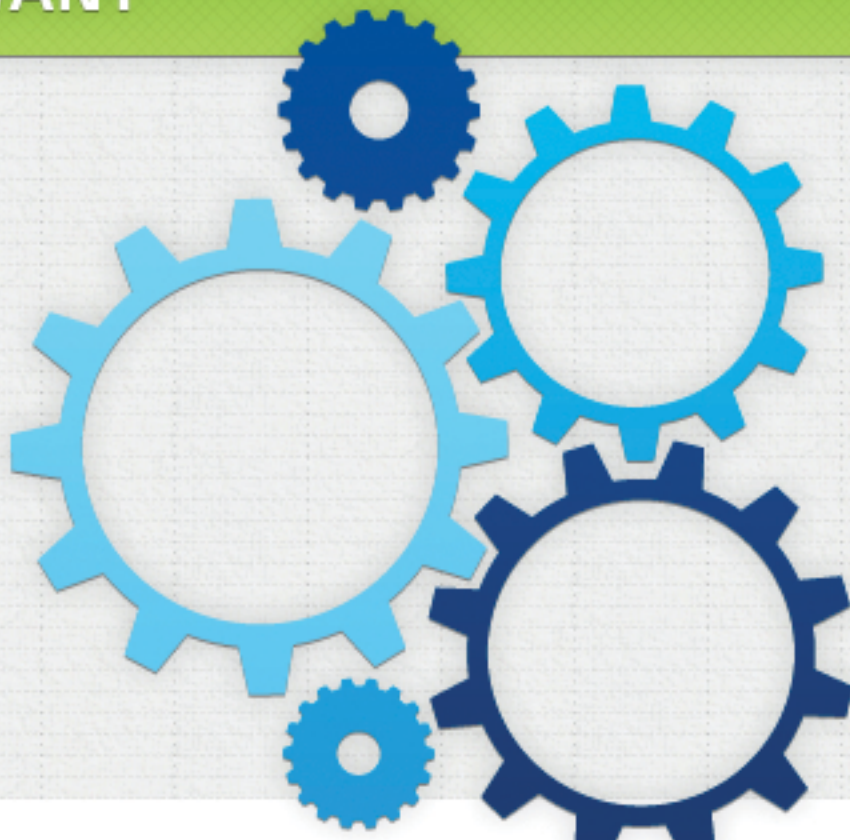
52% gave the system a favorable report card grade of "A" or "B" for meeting their health care needs and those of their families.



65% had a wellness visit or routine check-up in 2012.

THINGS THEY WANT

57% would like to customize their own health plans by selecting benefits and features rather than relying on pre-defined options—even though they know their decisions will affect cost.



70% would like to be able to see hospital prices and quality-of-care information on the Internet.



67% are interested in using videoconferencing for follow-up care visits.



62% are interested in using self-monitoring devices to check on their conditions and report the information to their doctors electronically.



32% would choose an innovative treatment that seemed to have a greater chance of working over a standard treatment that was more tested.

The Deloitte Center for Health Solutions works each year to identify global, national, and local trends. We survey consumers, physicians, and employers to examine market responses and develop insights that help companies understand what's happening—what will happen next—and what to do about it. Learn more at www.deloitte.com/centerforhealthsolutions.

About the survey: Each year since 2008, the Deloitte Center for Health Solutions has surveyed a representative sample of up to 4,000 U.S. adults about their interest in and ability to operate in a consumer health care market. Visit www.deloitte.com/us/2012consumerism to read the entire survey.

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