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Executive Summary

Altarum Institute conducts semiannual surveys to better understand consumer beliefs, practices, and preferences regarding health care. The spring 2014 Altarum Institute Survey of Consumer Health Care Opinions is the sixth in this ongoing series. Survey respondents included a nationally representative sample of 2,099 adults between the ages of 18 and 64 years old.

Key findings:

▲ **Similar to prior years, this survey finds strong evidence that consumers want a seat at the table in decisions about their health.** Nine out of 10 consumers prefer to be in control of medical decisions or participate in shared decisionmaking with their doctors. Only 7% of consumers want their doctor to take the lead role. These findings support an ongoing trend toward a health care model in which the consumer plays a central role in making choices that meet their needs.

▲ **Consumers are proactive in learning about their symptoms and medical conditions, but few seek out information on health care costs or quality.** Nearly 70% of consumers reported that they look up their symptoms online rather than going to the doctor first, and 64% take steps to learn about their health condition instead of relying solely on the doctor for information. However, only two in five consumers looked for data on the cost or quality of care before visiting a doctor within the past year. Most consumers (72%) continue to rely on word-of-mouth recommendations when choosing a health care provider.

▲ **A persistent gap exists between consumer attitudes and actions pertaining to health care costs.** Since this survey was first administered in fall 2011, around 90% of consumers have expressed some level of concern about their ability to pay for unexpected medical bills. More than 80% have also reported that they would feel comfortable talking with their doctors about the cost of care. Yet significantly fewer (around half of consumers) have ever asked about cost. This gap may be attributed to a lack of confidence, as only about one-third of consumers believe they have the ability to shop for better health care prices.

▲ **While most consumers are committed to their current Primary Care Provider (PCP), half would switch if they had to pay any extra monthly premium.** More than three-fourths of consumers expressed strong levels of commitment to their current PCP. If faced with paying extra premium in order to keep their PCP, however, 50% would be unwilling to pay. About 34% would pay up to $25 per month.

▲ **Although the vast majority of consumers want to be involved in health care decisions, many typically let the doctor take charge of the visit.** About three in five consumers either ask a few questions or wait for the doctor to lead the discussion and tell them what they should do. Conversely, 41% arrive with a prepared list of questions and make sure that they get the answers they need. Seven out of 10 consumers will accept a doctor’s recommendation despite having their own doubts.

▲ **Consumers report that they are likely to delay getting care.** Two-thirds of consumers indicated that they are more likely to visit the doctor later than they should have compared to earlier than necessary. While the majority of consumers (68%) indicated that they typically get all recommended preventive care, younger consumers were almost twice as likely to skip these checkups and tests.
▲ **Most consumers respond to health problems by seeking medical care.** In response to being sick, consumers are most likely to go to the doctor or hospital, follow medical advice, and take prescription or over-the-counter medicines. More than half are also likely to call upon their faith in God and take time off to help them manage their illnesses.

▲ **Consumers who have experienced medical errors are more likely to seek second opinions and refuse recommended treatments.** About one in six consumers reported that they or someone for whom they cared had received the wrong medication or dosage. Fewer consumers reported experiencing medical errors related to infections (12%), serious misdiagnoses (8%), and surgical mistakes (8%). These individuals were considerably more likely to exhibit behaviors that can prevent medical errors, such as seeking a second medical opinion or refusing treatments in order to seek more information.

▲ **Consumers with high Altarum Consumer Engagement (ACE) Measure scores are more likely to take an active approach to their health.** Altarum recently launched the ACE tool to measure levels of health engagement. Consumers with high ACE Measure scores in this survey were more likely to look up health-related information and ask questions during health care visits. Conversely, consumers with low ACE Measure scores were more likely to go to the doctor later than they should have.
I. Introduction

The U.S. health care system is in a state of transformation. Across the country, various initiatives and experiments are underway to provide Americans with more coordinated, high-quality, and affordable care. The voice of the consumer is increasingly recognized as a key ingredient in these improvement strategies. As a result, a wide range of stakeholders are working to engage consumers in health care discussions and decisions, fueled by evidence that informed and activated patients have better outcomes and incur lower costs.¹ This concept of consumer engagement, while still evolving, is contributing to a shift in the way in which health care is designed and delivered.

As Americans are encouraged to take an active role in managing their health, it is critical to understand the factors that may influence their decisions. Since 2011, Altarum Institute has been administering semiannual surveys to better understand consumer beliefs, practices, and preferences regarding health care. The spring 2014 Altarum Institute Survey of Consumer Health Care Opinions is the sixth in this ongoing series.

II. Decisions

Preferred Role in Decisionmaking

Consumers were asked about their involvement in decisions concerning their health. Three out of five reported that they prefer to take a lead role, 24% want to be completely in charge of decisionmaking, and 38% want to make the final decision with input from medical professionals. About 30% indicated that they prefer to make shared decisions with their doctors. A small minority of consumers want the doctor to be mostly (6%) or completely (1%) in charge of treatment decisions. These percentages have remained relatively consistent since fall 2011.

Exhibit 1: Role in Medical Decisions

Information Sources Used to Select a Doctor

When choosing a doctor, most consumers (72%) continue to rely on the opinions and recommendations of friends and relatives. About one in four (26%) have used online ratings of a doctor’s bedside manner or “wait time,” and 23% looked at online ratings of clinical quality to help them decide on a medical provider. Fewer consumers used data on the cost of care (16%) or selected a doctor based on newspaper, magazine, or television advertisements (11%).

Exhibit 2: Information Sources Used to Select a Doctor

Evaluating the Cost and Quality of Care

The move toward greater consumer engagement has triggered the development of new resources to support people in making health care choices. From online calculators that estimate the cost of medical procedures to report cards that rank hospitals by quality and safety scores, a range of tools are emerging to help consumers understand their options. However, Altarum survey findings suggest that few consumers are using price and quality data to inform their decisions. Among consumers who received health care services within the past year, the majority did not seek information about price or quality before they went to the doctor. About 41% asked how much their visit would cost in advance, and 43% looked for health care quality ratings before they selected a provider.

Exhibit 3: Consumer Use of Cost and Quality Data in the Past 12 Months
This may be due, in part, to the fact that consumers remain skeptical of their ability to shop for high-value, low-cost health care. Since 2011, this survey has found that only about one-third of consumers feel confident that they can shop for better health care prices and around half of consumers believe that they can find better qualified doctors by comparing performance results.

Exhibit 4: Confidence in Shopping for Better Care

![Confidence in Shopping for Better Care](image)

The vast majority of consumers (89%) expressed some level of concern about their ability to pay for unexpected medical bills. Most (84%) also reported that they would feel comfortable asking their doctors about the cost of health care services. Yet only 56% reported that they had ever made such inquiries. Our past surveys have found a similar gap between consumer attitudes and actual behaviors regarding health care costs, signaling that consumers may not feel as though they have the power to control or influence these expenses.

Exhibit 5: Consumer Attitudes and Behaviors Concerning Health Care Costs

![Consumer Attitudes and Behaviors Concerning Health Care Costs](image)
III. Primary Care Providers (PCP)

Commitment to PCPs

About 9 out of 10 consumers (87%) reported that they have a PCP. When asked to rate their loyalty to their PCP, most consumers indicated strong levels of commitment, and nearly half (46%) reported that they were completely committed to keeping their PCP.

Exhibit 6: Commitment to PCP

These commitment levels shifted once consumers were faced with paying more to keep their current PCP. When asked to imagine that their health insurance company required a higher premium in order to visit their PCP, half of consumers reported that they would not pay any extra per month. About one-third would pay up to $25 more per month, and 10% would pay up to $50 more per month. Only 6% indicated that they would pay an extra $100 or so per month to retain their current PCP.

Exhibit 7: Extra Premium That Consumers Would Pay to Keep Their PCP

I would not pay any more to keep my PCP
I would pay up to $25 per month
I would pay up to $50 per month
I would pay up to $100 per month
I would pay more than $100 per month

On a scale of 1–5, how committed are you to keeping your current PCP?

Not at all committed
2%
1
2%
2
17%
3
31%
4
46%
5
Completely committed
IV. Care-Seeking Behavior

Typical Care-Seeking Behaviors

Consumers interact with health care providers in different ways. Some do research ahead of time and ask specific questions about their health conditions and goals, while others prefer to take a more passive approach and rely on their doctors to give guidance and instructions. In this survey, nearly half of consumers (48%) reported that they usually ask the doctor a few questions but let the doctor take charge of the visit. About 41% arrive to their visit with a list of questions to facilitate discussions and make sure that they get the answers they need. One in 10 waits for the doctor to lead the visit and tell the consumer what to do.

Exhibit 8: Likelihood of Asking Questions When Visiting the Doctor

![Diagram showing the likelihood of asking questions when visiting the doctor]

Consumers were asked about their typical behavior when seeking health care. Most (69%) reported that they are more likely to look up their symptoms online before going to the doctor, while 31% are more likely to go to the doctor first. Similarly, 64% of consumers educate themselves about their health conditions, and 36% depend on the doctor to give them the information they need. Two-thirds of consumers are more likely to visit the doctor later than they should have, while the remaining third indicated that they are more likely to seek care sooner than necessary. Three-fourths of consumers generally fill prescriptions at their usual pharmacy rather than compare prices at different drug stores.
Seven out of 10 consumers reported that they are more likely to accept a doctor’s recommendation despite having their own doubts. The remaining 30% of consumers are more likely to go against these recommendations in order to seek more information.

Overall, more than two-thirds of consumers (68%) were more likely to receive than skip recommended preventive care services. Younger consumers were almost twice as likely to avoid checkups and preventive tests compared to those aged 55 and older.
V. Self-Care

Response to Medical Illnesses

A person’s self-care behaviors can play an important role in their overall health. This survey sought to explore some of the ways in which consumers respond to and cope with health problems. When asked about their most recent conditions, four out of five consumers considered these to be mild (42%) or moderate (37%) in severity. The remainder reported having serious (15%) or very serious (7%) illnesses.

### Exhibit 12: Severity of Most Recent Illness

<table>
<thead>
<tr>
<th>Severity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>42%</td>
</tr>
<tr>
<td>Moderate</td>
<td>37%</td>
</tr>
<tr>
<td>Serious</td>
<td>15%</td>
</tr>
<tr>
<td>Very Serious</td>
<td>7%</td>
</tr>
</tbody>
</table>

Think about your most recent illness and describe its severity:

### Exhibit 11: Likelihood of Seeking Preventive Care

<table>
<thead>
<tr>
<th>Age</th>
<th>More likely to skip check-ups and preventive tests</th>
<th>More likely to get all recommended check-ups and tests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>32%</td>
<td>68%</td>
</tr>
<tr>
<td>25–34 years</td>
<td>32%</td>
<td>55%</td>
</tr>
<tr>
<td>35–44 years</td>
<td>33%</td>
<td>68%</td>
</tr>
<tr>
<td>45–54 years</td>
<td>25%</td>
<td>67%</td>
</tr>
<tr>
<td>55–64 years</td>
<td>25%</td>
<td>76%</td>
</tr>
</tbody>
</table>
Most consumers responded to these recent health problems by following medical advice, taking prescription and over-the-counter medications, and seeking care from a doctor or hospital. More than one-quarter of consumers were very likely to call upon their faith in God, and about one in five would take time off to cope with their conditions. Most consumers reported that they were not likely to use spiritual healing or seek sympathy or comfort from others.

Exhibit 13: Consumer Responses to Medical Illnesses

<table>
<thead>
<tr>
<th>How likely is it that you would do each of the following in response to your illness?</th>
<th>Not at all likely</th>
<th>Very likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Follow medical advice</td>
<td>3%</td>
<td>24%</td>
</tr>
<tr>
<td>Take prescription medicine</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Take over-the-counter medicine</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Go to a doctor or hospital</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Call upon faith in God</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>Take time off</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>Use spiritual healing</td>
<td>36%</td>
<td>18%</td>
</tr>
<tr>
<td>Seek sympathy or comfort from others</td>
<td>25%</td>
<td>23%</td>
</tr>
</tbody>
</table>

VI. Medical Errors

Experience with Medical Errors

According to a recent study, more than 400,000 people die each year due to preventable medical mistakes. This staggering statistic would make medical errors the third leading cause of death in the United States. In Altarum’s survey, consumers were asked about their own experience with medical errors. One in six (17%) reported that they or someone for whom they cared had been given the wrong medication or dosage. Others reported errors related to hospital-acquired infections (12%), serious misdiagnoses (8%), and surgical mistakes (8%).

Exhibit 14: Medical Errors

Have any of the following medical errors happened to you or someone you care for?

- Given the wrong medication or dose: 17%
- Infection occurring in the hospital: 12%
- Serious misdiagnosis: 8%
- Surgical mistake: 8%

Reducing the Risk of Medical Errors

Consumers can help to protect against medical errors by being active participants in their own care. For example, becoming more knowledgeable about medical conditions and treatment plans, asking questions and consulting with experts, and sharing important health information with providers may minimize the risk of medical mistakes. This survey found that 82% of consumers have searched for information on the Internet about their health-related symptoms. About two out of five consumers (43%) have gone to more than one doctor to seek a second opinion on a diagnosis or treatment, and nearly one-third (32%) have refused a recommended treatment. Conversely, 38% reported that they received a medical treatment even though they had doubts or concerns about it.

Exhibit 15: Health Care Behaviors

Have you ever...

- Looked online to try to diagnose a health symptom: 82%
- Gotten a second opinion: 43%
- Refused a recommended treatment: 32%
- Received a treatment even though you had doubts about it: 38%
Consumers who had experience with medical errors were much more likely to report behaviors that could prevent these mistakes from occurring again. For example, 57% of consumers who experienced medical errors have gotten a second opinion, compared to 37% of consumers who had not faced errors. Consumers who reported medical errors were also twice as likely to have refused a recommended treatment. These findings are consistent with past survey results, which found that individuals who had experienced an error wanted to play a more active role in upcoming medical decisions compared with those who had not.

Exhibit 16: Health Care Behaviors by Experience with Medical Errors

<table>
<thead>
<tr>
<th>Health care behaviors by experience with medical errors</th>
<th>Consumers who have experienced medical errors</th>
<th>Consumers who have not experienced medical errors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gotten a second opinion</td>
<td>57%</td>
<td>37%</td>
</tr>
<tr>
<td>Refused a recommended treatment</td>
<td>47%</td>
<td>25%</td>
</tr>
</tbody>
</table>

VII. Altarum Consumer Engagement (ACE) Measure

ACE Measure

In 2013, Altarum launched a tool to better understand the ways in which people engage in their health. The Altarum Consumer Engagement (ACE) Measure is a 21-item survey that assesses four domains of health engagement: ownership, commitment, informed choice, and navigation.

Consumers who took the spring 2014 Altarum Institute Survey of Consumer Health Care Opinions were also asked to respond to the ACE Measure questions. Highlights from these results are included in this section.

Ownership

The ownership domain assesses the extent to which a person feels responsible for his or her own health. In this survey, consumers with high ownership scores were more likely to look up their health symptoms online before going to the doctor, compared to those with low ownership scores.
Commitment

The commitment domain measures a person’s ability to manage his or her own health. Consumers with lower commitment scores reported that they were more likely to visit the doctor too late, compared to consumers who scored higher on the commitment scale.

Informed Choice

The informed choice domain assesses the degree to which a person seeks and uses health-related information. Not surprisingly, consumers with highly informed choice scores were twice as likely to learn about their health conditions compared to consumers with low scores. Conversely, those with low informed choice scores were nearly three times more likely to rely on the doctor for information and instructions.
Navigation

The navigation domain measures how skilled a person is at using the health care system. In this survey, those with high navigation scores were more than twice as likely to arrive at a health care visit with a prepared list of questions for the doctor as those with low navigation scores.

Exhibit 20: Likelihood of Asking Questions by ACE Measure Navigation Score
VIII. Conclusion

The spring 2014 Altarum Institute Survey of Consumer Health Care Opinions finds continued evidence that consumers want to be involved in decisions about their health. Indeed, more than 90% prefer to take the lead role or have an equal amount of input as their doctors when making treatment choices. Many consumers reported behaviors that reflect this desire to be engaged in their own health, such as learning about their symptoms and medical conditions and asking questions during health care visits. Consistently with past survey findings, however, most consumers are not using health care cost and quality data to influence decisions. Confidence in their own ability to shop for better prices or higher quality remains relatively low.

Results of this survey lend some clues about what makes consumers more actively involved in their care. Consumers who have experienced a medical error were more likely to report taking an active role in decisions and ask questions of providers. This raises a concern that in some cases consumer engagement occurs as a result of harm. As efforts to improve engagement expand, it will be important to determine ways to engage consumers before problems occur.

Lastly, this survey introduces a new measure of consumer engagement, the ACE, that separates four independent domains of how consumers behave with regard to their health and health care. This measure indicates that, for example, a consumer’s ability to follow through with lifestyle changes is different from his ability to find and use information about his condition. The ACE will be repeated in subsequent surveys to better understand which domains of engagement influence which types of choices.
Appendix

Methodology

Survey respondents were paid participants from a nationwide panel maintained by Survey Sampling International, Inc. The survey was administered via the Internet in March 2014. Responses for any participant whose patterns indicated either a lack of understanding or hasty completion were dropped from the sample. This resulted in a total of 2,099 usable surveys.

Some questions are repeated in each semiannual survey. It should be noted that because different people respond to each survey, one cannot conclude with certainty that opinions have changed over time. However, consistent trends may be suggestive of a general shift in opinion.

Respondents

Survey respondents included a nationally representative sample of adults between the ages of 18 and 64 years old. Slightly more than half (58%) of all respondents were female. The majority (78%) identified themselves as White, 7% as African American, 5% as Hispanic, and 4% as Asian. About half were employed either full-time (41%) or part-time (11%), and 57% reported that they were married. Annual household incomes ranged from less than $20,000 to more than $150,000, with a median income between $50,000 and $60,000.

Exhibit 21: Demographic Characteristics of Survey Respondents

<table>
<thead>
<tr>
<th>Age (years)</th>
<th>%</th>
<th>Gender</th>
<th>%</th>
<th>Employment status</th>
<th>%</th>
<th>Annual household income</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>18–24</td>
<td>6</td>
<td>Female</td>
<td>58</td>
<td>Full-time</td>
<td>41</td>
<td>Less than $20,000</td>
<td>5</td>
</tr>
<tr>
<td>25–34</td>
<td>16</td>
<td>Male</td>
<td>42</td>
<td>Part-time</td>
<td>11</td>
<td>$20,000–$39,999</td>
<td>27</td>
</tr>
<tr>
<td>35–44</td>
<td>19</td>
<td></td>
<td></td>
<td>Not employed</td>
<td>48</td>
<td>$40,000–$59,999</td>
<td>22</td>
</tr>
<tr>
<td>45–54</td>
<td>28</td>
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<td></td>
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<td>$60,000–$74,999</td>
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<td>55–64</td>
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<td></td>
<td>$75,000–$99,999</td>
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<tr>
<td>Race/ethnicity</td>
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<td>$100,000–$149,999</td>
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<tr>
<td>White</td>
<td>78</td>
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<td>More than $150,000</td>
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<tr>
<td>African American</td>
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<td>Hispanic</td>
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<td>Asian</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Other/did not answer</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

Figures rounded to nearest percent

Health Insurance Deductible Amounts

Annual health insurance deductibles varied from $0 to more than $10,000, with a median deductible between $500 and $1,000. About 17% of consumers reported that they did not know the amount of their health insurance deductible.
Self-Rated Health Evaluation

Survey respondents were asked to rate the status of their own health on a scale from excellent to poor. About 11% perceived themselves to be in excellent health, and nearly two-thirds reported themselves in very good (33%) or good (31%) health. About 18% rated their health as fair and 6% as poor.

Exhibit 23: Self-Rated Health

Health Care Utilization

Over the past year, 83% of consumers received health care services, and one in five (20%) stayed overnight in a hospital. About 36% reported that they had visited a medical facility due to an illness within the past month.
Nearly three-fourths (74%) of respondents take at least one medication prescribed by a doctor. Half of these individuals take between one and three medications on a regular basis. Approximately 4% of respondents reported taking 10 medications regularly, and 3% reported taking 15 or more medications. Two out of five consumers (40%) reported that they sometimes forget to take their daily medicine. Within the past 2 weeks, 30% had forgotten to take their medication.