

Health Care and Reform: What do People Really Know?

A Qualitative Consumer Research Study
Third Quarter, 2010



THE INSIGHT GROUP



KNIGHTmarketing

Health Care Focus Groups

- ▶ Background
 - ▶ Focus groups were held in Venice, Florida in the third quarter of 2010.
 - ▶ The purpose of the research was to
 - ▶ Learn more about consumers' perceptions of the health care system
 - ▶ Learn about consumers' understanding of health care reform legislation
 - ▶ Understand what they know and believe about how it will affect hospital care, health insurance and physician care
 - ▶ Compare the perceptions of older consumers with younger ones
 - ▶ Focus groups were sponsored by Knight Marketing, a national health care marketing firm, and conducted by Rick Sandler, President of the Insight Group.



Health Care Focus Groups

- ▶ Methodology
 - ▶ Two groups, one under 65 and one over 65 years of age, were conducted with pre-recruited respondents who met the following criteria:
 - ▶ Range of ages within each category
 - ▶ Currently have health insurance, including Medicare for older consumers
 - ▶ Mix of genders, incomes, occupations



Health Care Focus Groups

- ▶ Key Findings: **Health Care Legislation**
 - ▶ Consumers have very mixed feelings about the recent health care legislation enacted by Congress
 - ▶ Older consumers were positive and enthusiastic about it
 - ▶ Younger consumers were negative and suspicious about it, and fearful that it would be damaging to them personally



Health Care Focus Groups

- ▶ Key Findings: **Health Care Legislation**
 - ▶ Both younger and older consumers were disappointed that the bulk of reforms will not be enacted until 2014
 - ▶ Consumers cited a concern that there will not be enough doctors and nurses because of increased enrollment in plans



Health Care Focus Groups

- ▶ Detailed Findings: **Doctor-Hospital Relationship**
 - ▶ The hospital that a doctor is affiliated with has some influence on consumers, but overall is relatively insignificant
 - “My relationship with my doctor is more important than the hospital he is with”
 - “When selecting a doctor, you look for the hospital he is with”



Health Care Focus Groups

- ▶ Detailed Findings: **Hospital Ratings**
 - ▶ Consumers tended to have some regard for hospital rating reports (i.e., Top 50 Hospitals, U.S. News, etc.) because they legitimize the hospital
 - ▶ “This creates a positive image; it makes you feel good that you have picked the right hospital”
 - ▶ “This creates a better impression”
 - ▶ “But sometimes you don’t have a choice, you have to go where the insurance sends you”
 - ▶ “I think it’s all just marketing”



Health Care Focus Groups

- ▶ Detailed Findings: **Provider Impressions**
 - ▶ Consumers had mostly negative impressions of health care insurance providers, with a strong feeling that they were unregulated and too expensive
 - ▶ “I pay over \$1,800 a month – way too much”
 - ▶ “Blue Cross premiums keep going up. Every time, I have to go to a higher deductible plan to be able to afford it”
 - ▶ “I’m not very happy with Blue Cross – I think they’re the bottom of the barrel”



Health Care Focus Groups

- ▶ Detailed Findings: **Provider Impressions**
 - ▶ For those on Medicare, there was strong satisfaction
 - ▶ “I believe government programs are better than private programs”
 - ▶ “I have Medicare and Secure Horizons – I haven’t had any problems”
 - ▶ “I’m on Medicare. Before that, I had no insurance so I’m thrilled with this”
 - ▶ “I use a Canadian pharmacy – I have problems with the donut hole”



Health Care Focus Groups

- ▶ Detailed Findings: **Health Care Reform**
 - ▶ Consumers felt that they had a fairly good understanding of the recent health care legislation, although they admitted that it was complicated
 - ▶ “It is confusing; there’s too much information”
 - ▶ “Even the congressmen who voted for it didn’t read the entire bill”
 - ▶ “I’m not sure how it will affect me. Most of it is not clear”



Health Care Focus Groups

- ▶ Detailed Findings: **Health Care Reform**
 - ▶ Older consumers seemed more satisfied with the potential effects of this legislation
 - ▶ “It will help by covering the donut hole”
 - ▶ “It will affect my family, especially with pre-existing conditions”
 - ▶ “For the uninsured, this will be very good for them”
 - ▶ “It will help our kids, but they should start it sooner”
 - ▶ “It will be a positive. This is a plus in every way”
 - ▶ “A lot of this was political – to get to Obama”



Health Care Focus Groups

- ▶ Detailed Findings: **Health Care Reform**
 - ▶ Older consumers feel much of the hostility will diminish
 - ▶ “It will all die down – people have come to accept it. It’s a good program”
 - ▶ “We can’t let the insurance companies do what they are doing”
 - ▶ “There is no regulation to stop companies from increasing rates every year. They are the gate-keepers”
 - ▶ “Profit should not be involved with people’s health”



Health Care Focus Groups

- ▶ Detailed Findings: **Health Care Reform**
 - ▶ Younger consumers were more negative
 - ▶ “Many doctors are saying they will quit”
 - ▶ “There is too much intervention – things will be dictated by the government”
 - ▶ “They will cut Medicare back”
 - ▶ “This will be detrimental to everybody”
 - ▶ “This will be like Canada”
 - ▶ “Small businesses will go out of business”
 - ▶ “This will ruin the economy – it will be devastating”



Health Care Focus Groups

- ▶ Detailed Findings: **Reaching Consumers**
 - ▶ Most respondents felt that the best way to get health care information to them was through the internet. Other media outlets were important too
 - ▶ “I surf everywhere”
 - ▶ “I watch television – CNN, Fox, MSNBC”
 - ▶ “Newspaper – local and national”
 - ▶ “NY Times, Herald-Tribune, Gondolier”
 - ▶ “NPR, PBS, Charlie Rose”



Health Care focus Groups

- ▶ Conclusions
 - ▶ There are considerable differences of opinion about the health care reform measures that have been enacted
 - ▶ Overall, consumers are concerned about rising health care costs but unsure about legitimate solutions
 - ▶ While people are not totally satisfied with their own health care options, they are also not overwhelmingly dissatisfied either



Health Care Focus Groups

- ▶ Conclusions
 - ▶ Additional research may be needed as more information appears about health care reform and awareness and perceptions continue to evolve
 - ▶ For more information, please contact:
 - ▶ Knight Marketing
 - ▶ info@knightmarketing.com

