

KS&R ONLINE CONSUMER PANEL



Future Health and Medical Care Needs

BABY BOOMERS

June 25, 2003

Table of Contents

	<i>Page</i>
➤ TAB 1: Background and Highlights	2
➤ TAB 2: Detailed Results	5

TAB 1: Background and Highlights

- Preface
- Highlights

Preface

- KS&R recently conducted an on-line survey with self-identified Baby Boomers about what they think their future medical and health care needs will be.
 - ➔ KS&R National Consumer Panel
 - ➔ Visitors to KS&R Web Site
 - Responses tallied from May 30 to June 16, 2003
 - 571 responses received; 501 identified as Baby Boomers living in the United States
 - Additional segments used for comparisons
 - Older Age Segment: born between 1940 and 1950
 - Younger Age Segment: born between 1960 and 1970
- ➔ Twenty-eight questions asked of these self-identified Baby Boomers
 - For example, As health care premium costs increase what are you willing to do to keep your coverage?
 - What influences your decision when choosing a physician, specialist, or hospital?
 - Are you interested in being able to e-mail your physician's office?

Highlights

This “next generation” . . .

- Will be sizable and influential in shaping decisions on access to health care.
 - ➔ It is becoming more proactive and involved.
- May well be the best (or at least significantly better) informed generation.
 - ➔ It appears receptive to multiple information sources (community information, electronic strategies, etc.)
- The provider is likely to have increasing influence on choice and health care decisions.
- Consumers will not likely accept (willingly) fundamental changes in health care coverage. They may accept and urge changes in how care is paid for.
- E-commerce will continue to develop as a key knowledge development/transactional tool.

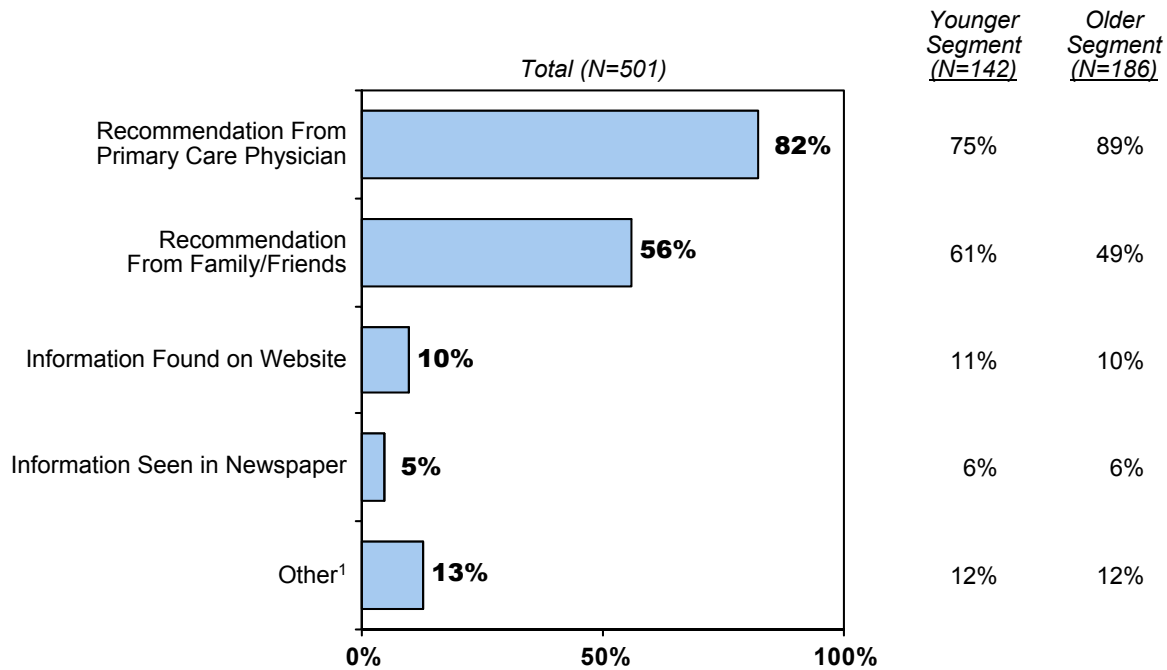
TAB 2: Detailed Results

➤ Provider Choice Influencers
➤ Importance of Provider Choice Attributes
➤ Key Influencers for Health Needs Assessments
➤ Reliance on Website Information for Physician Outcomes Data
➤ Reliance on Family in Support of Healthcare Decision Making
➤ Attendance at Health Related Seminars
➤ Importance of Holistic Medicine
➤ Internet Utilization for Healthcare Information
➤ Preference for E-mail Receipt of Healthcare Information
➤ Preference for Health Plan Website Transactions and Access
➤ Preferred Changes in Healthcare Management
➤ Expectation for Payment of Health Related Needs
➤ Health Plan Coverage and Prescription Expectations
➤ Suggestions for Healthcare Cost Containment
➤ Familiarity and Expectations for Telemedicine

Provider Choice Influencers

BABY BOOMERS

“When Choosing a Physician, Specialist, or Hospital Which of the Following Influences Your Decision?”

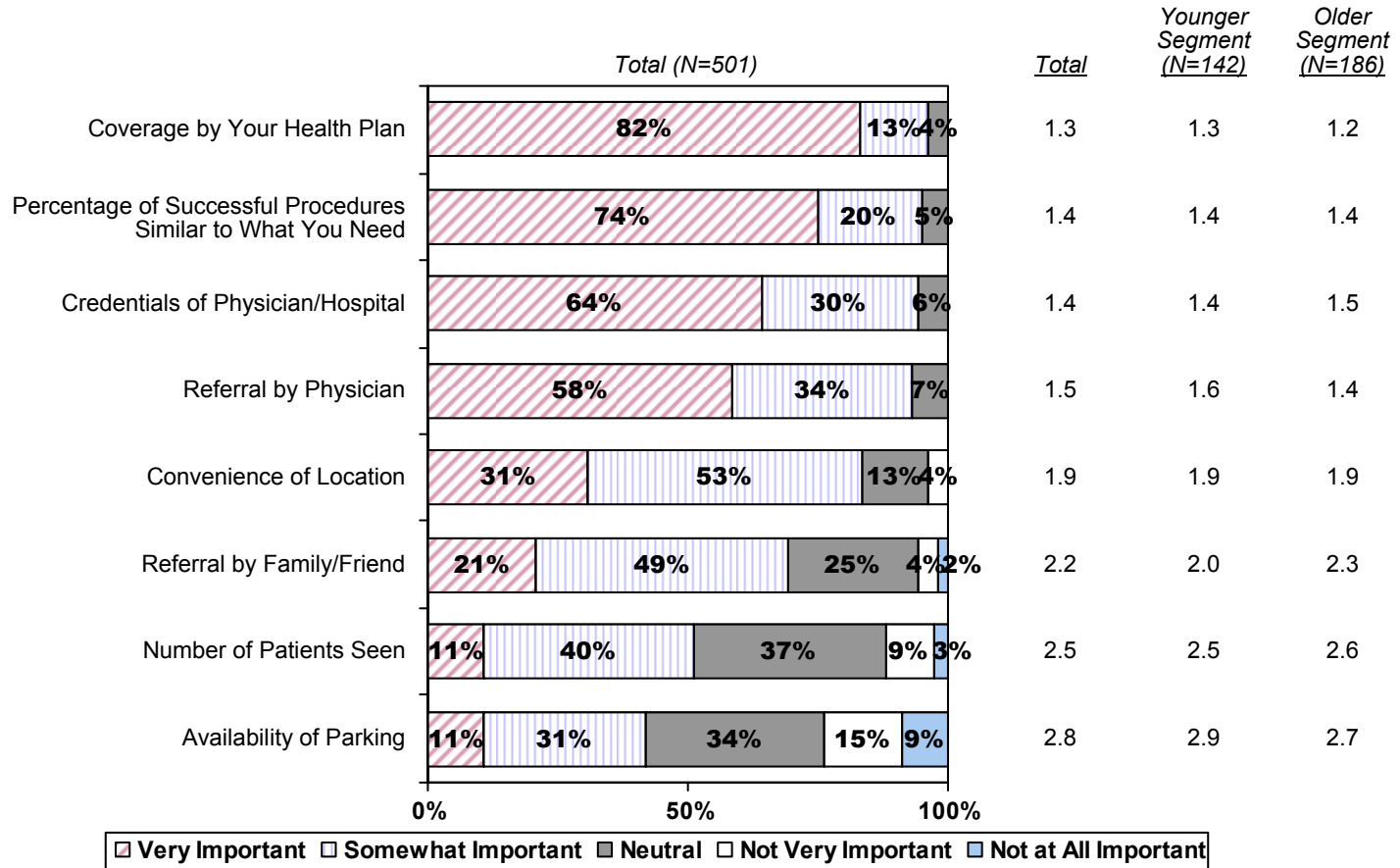


¹ Other includes health plan restrictions, location and previous experience with provider/facility.

Importance of Provider Choice Attributes

BABY BOOMERS

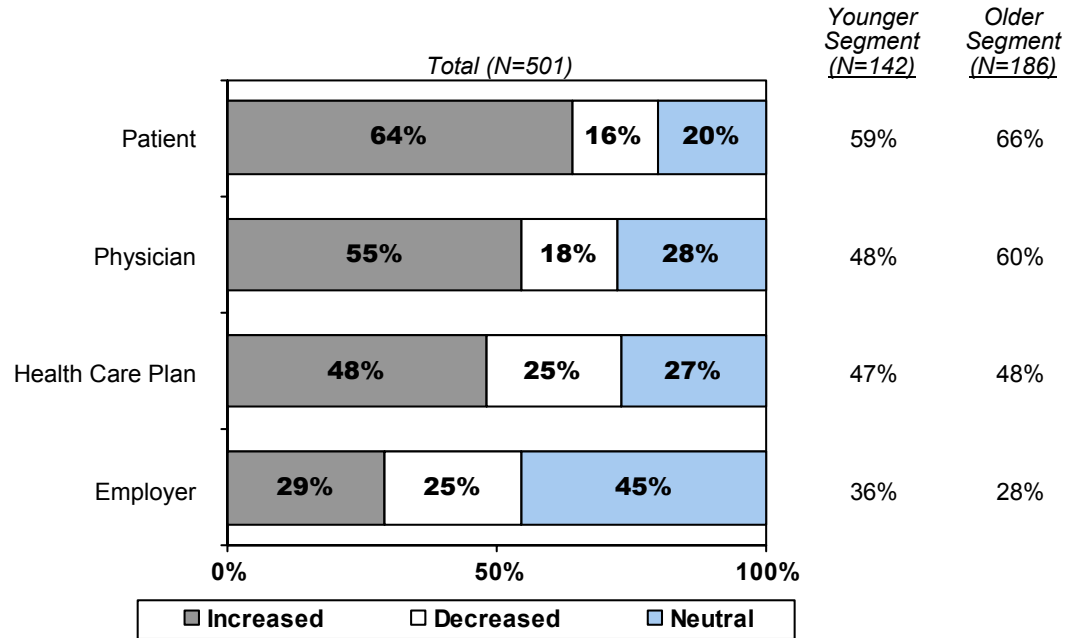
“Please Indicate the Importance of Each of the Following When Choosing a Physician, Specialist, or Hospital.”
 (“1” = Very Important, “5” = Not at all Important)



Key Influencers for Health Needs Assessments

BABY BOOMERS

“Please Rate the Following as to How Much Influence Each Will Have as Primary Decision Makers for Your Health Care Needs in the Future Given the Rising Costs of Health Care.”

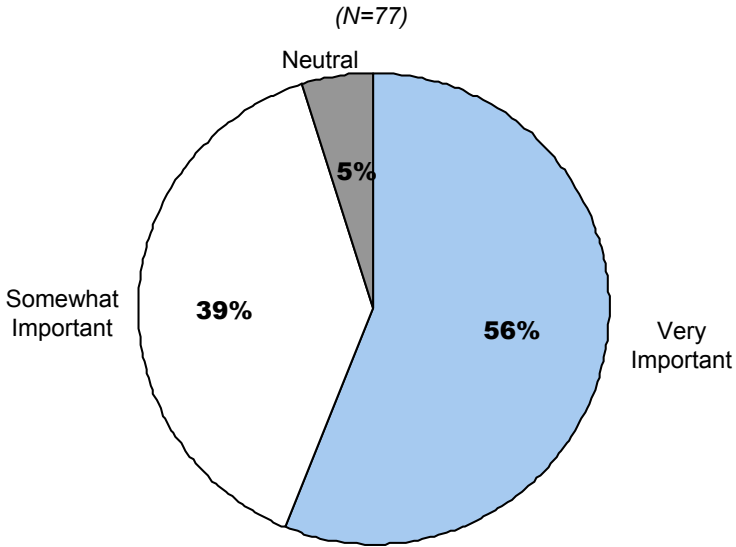
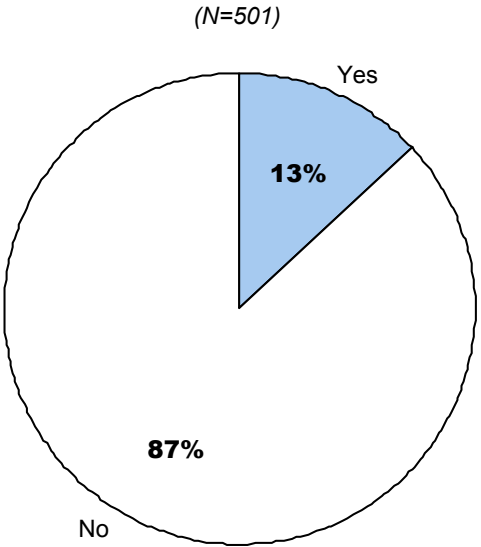


Reliance on Website Information for Physician Outcome Data

BABY BOOMERS

“When You Need a Physician, Do You Look at Outcome Data Scores at Web Sites Providing End Data?”

“How Important is this Information in Your Choice of a Hospital/Physician?”

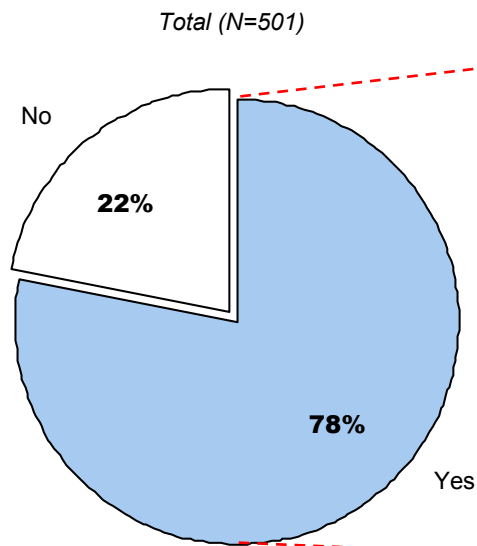


Younger age segments more likely to consider outcome data.

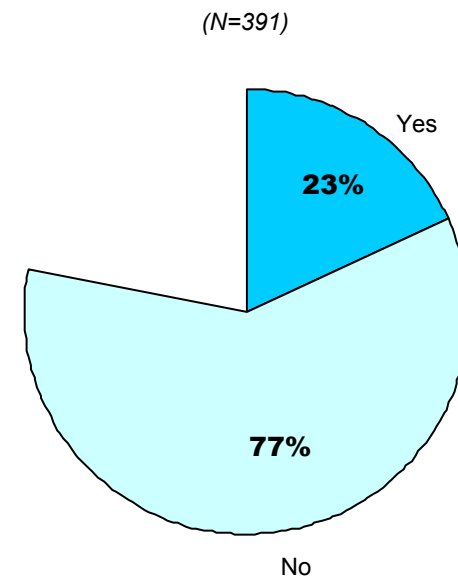
Reliance on Family in Support of Healthcare Decision Making

BABY BOOMERS

“Do You/Your Spouse Have Any Parents That Are Still Living?”



“Do They Rely on You/Your Spouse When Making Decisions About their Health Care?”

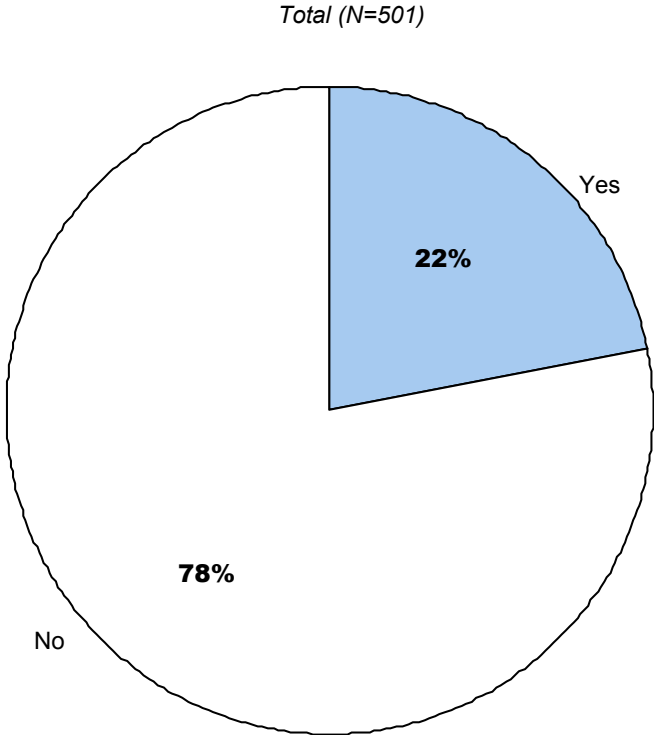


Older segment have parents (61%) and nearly a third are involved in their parents health care decisions. Also, they are more likely to decide for their parents.

Attendance at Health Related Seminars

BABY BOOMERS

“Have You Attended Any Seminars/Workshops That Provided Health-Related Information?”

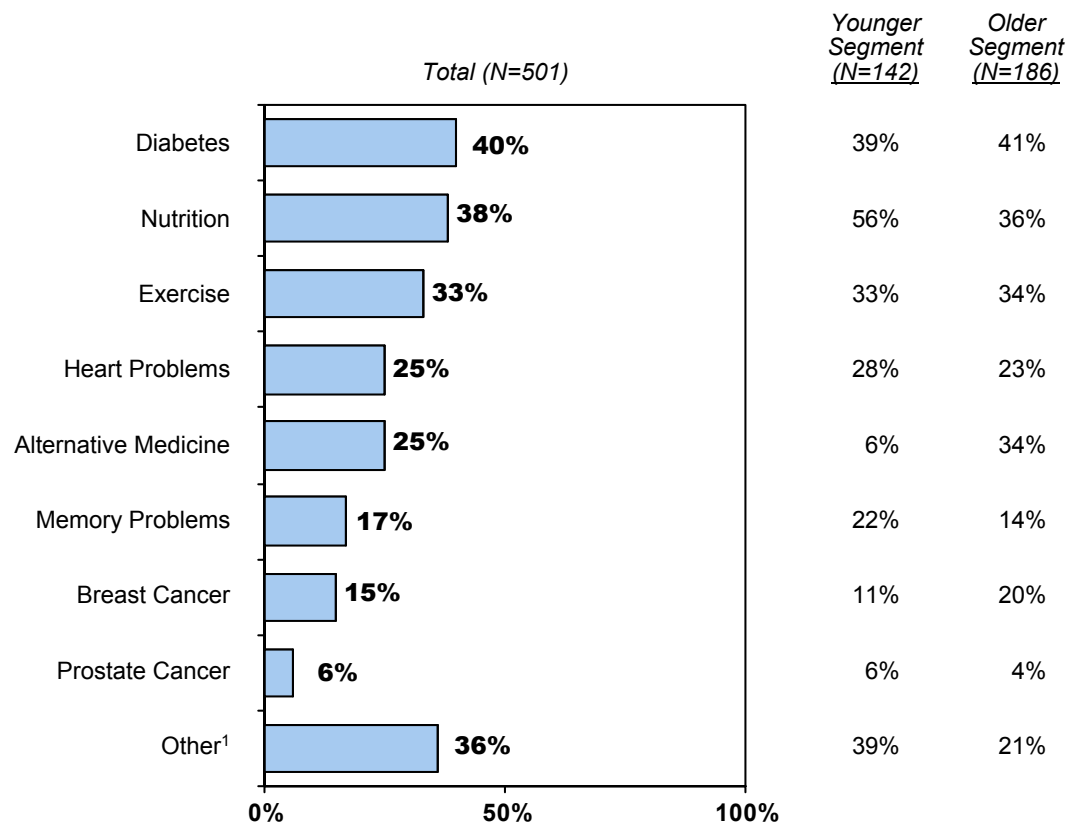


30% of older segment has attended seminars/workshops compared to 13% of younger segment.

Attendance at Health Related Seminars (cont.)

BABY BOOMERS

“What (Seminar/Workshop) Topics Have you Attended?”



¹ Other includes women's health, arthritis, and stress management.

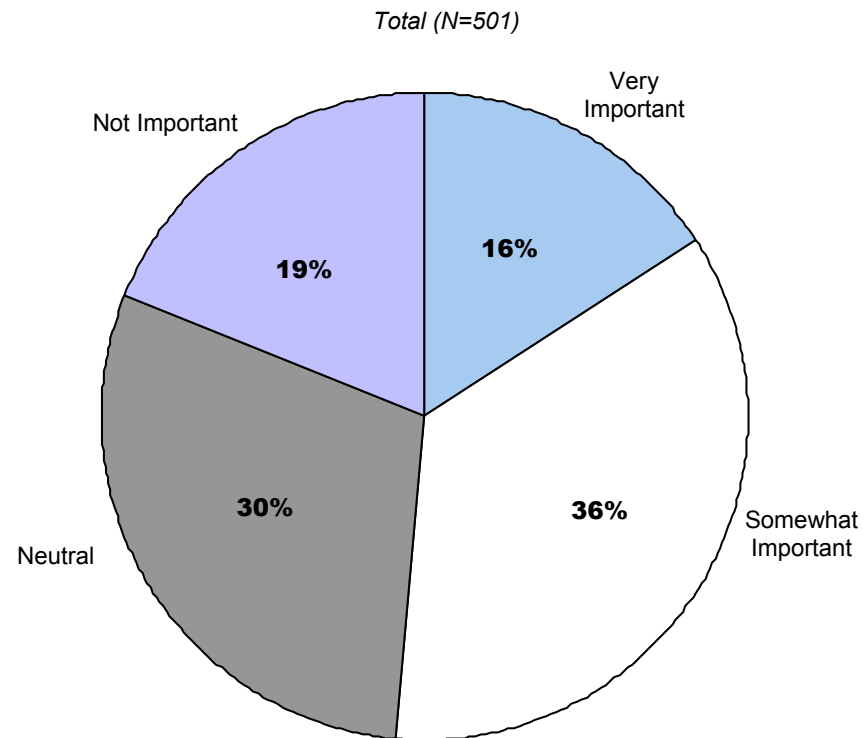
“What Other Health Related Topics Would You Like to See Offered by Your Community?”

- ⇒ *“Weight loss.”*
- ⇒ *“Cholesterol control.”*
- ⇒ *“Depression.”*
- ⇒ *“Anxiety disorders.”*
- ⇒ *“Stress.”*
- ⇒ *“Holistic health.”*
- ⇒ *“Menopause.”*
- ⇒ *“Women and health care and menopause.”*

Importance of Holistic Medicine

BABY BOOMERS

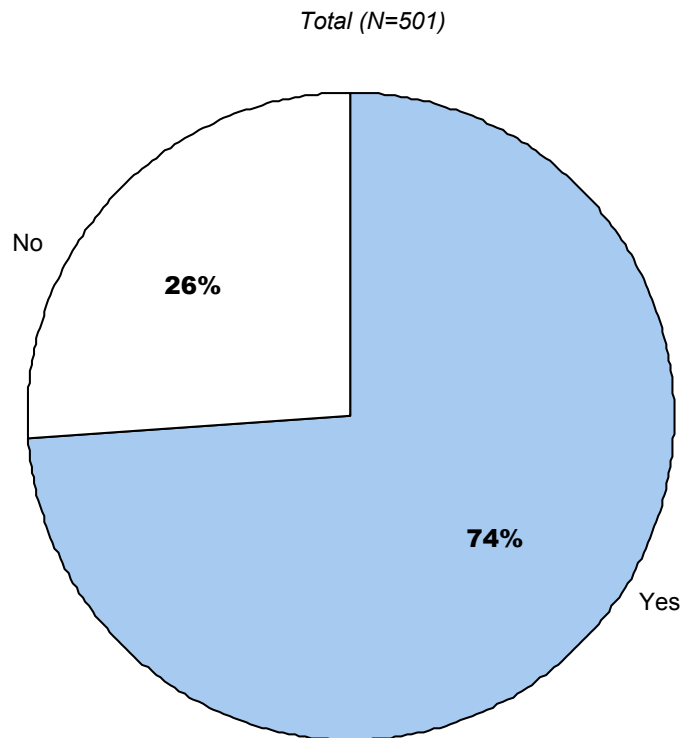
“How Important is it to You That Your Doctor Be Open to Exploring/Recommending Alternative/Holistic Medicine?”



Use of the Internet for Health Care Information

BABY BOOMERS

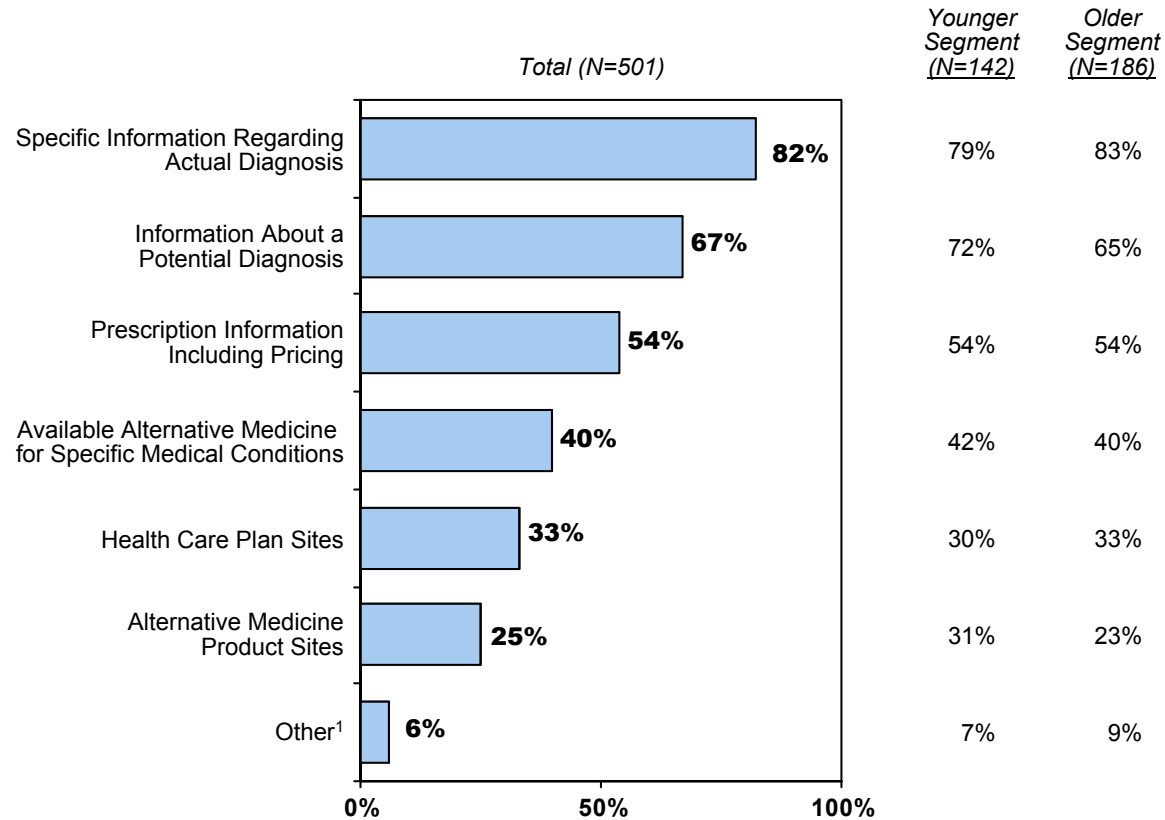
“Have You Ever Used Web Sites to Find Health Care Information”



Current Utilization of Internet for Health Care Information

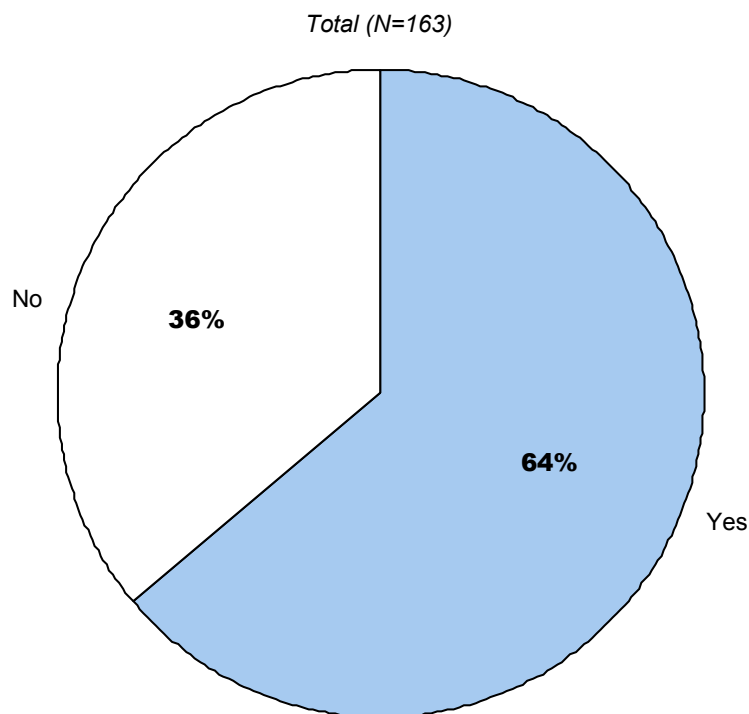
BABY BOOMERS

“What Types of Web Sites Have You Used (to Find Health Information)?”



¹ Other includes Web MD, Dr.Koop.com, sites related to treatment and outcomes, general information sites, and sites about hospitals and providers.

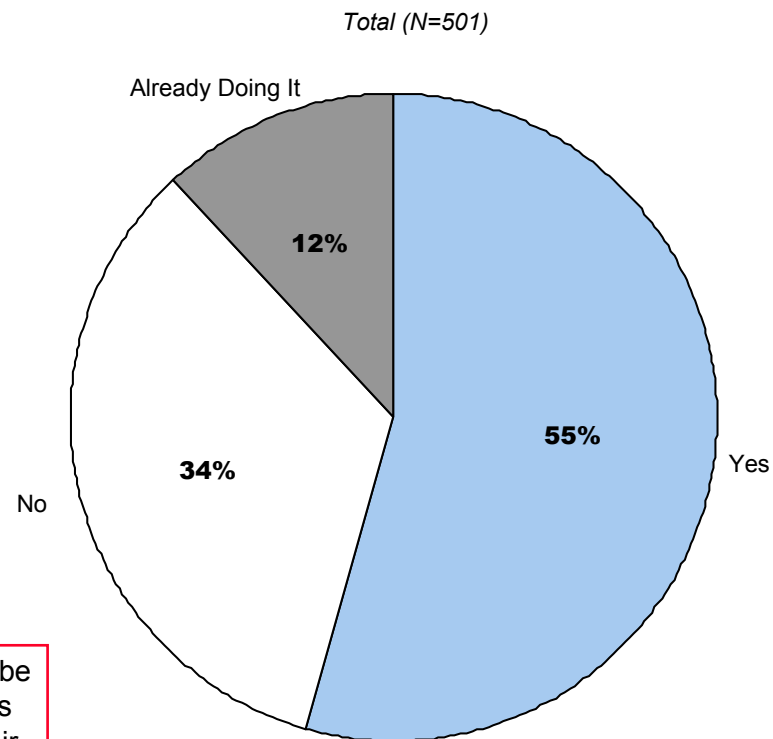
“Should Physicians Answer Medical Questions From Patients Using E-Mail?”



Preference for E-Mailing Physician's Office

BABY BOOMERS

"Would You Like to Be Able to E-Mail Your Physician's Office?"

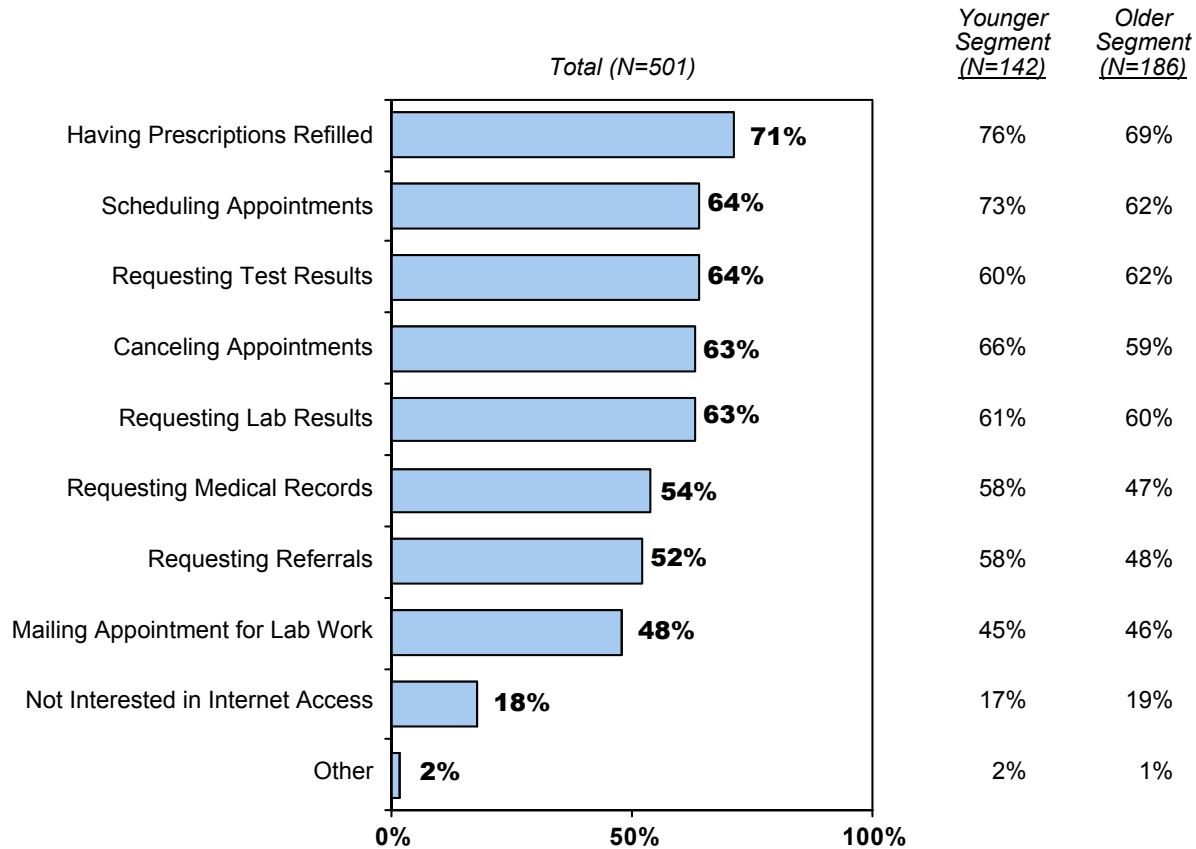


Most respondents felt there should be no charge. While older respondents were more likely to suggest that their health plan pay for it or share the cost with them.

Preference for Health Plan Website Transactions

BABY BOOMERS

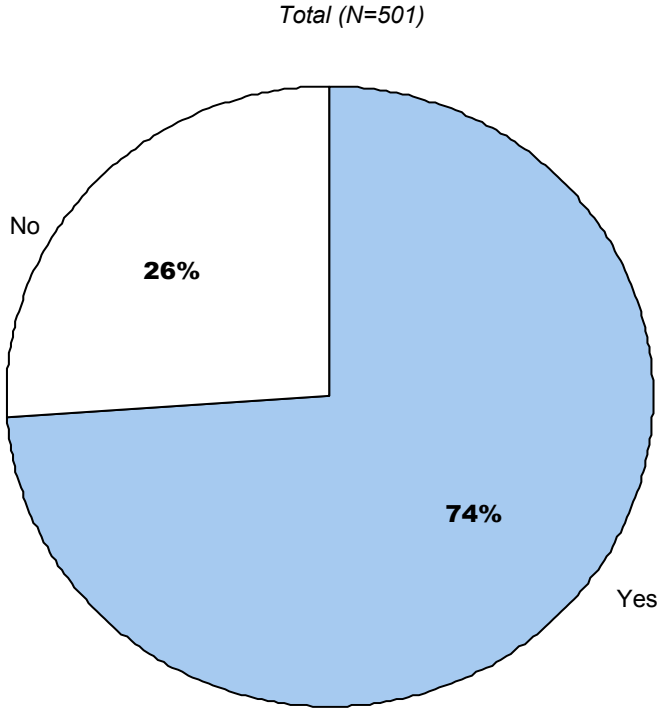
“What Types of Transactions Would You Like to Do Via a Website Regarding Your Physician’s Office?”



Preference for Internet Access to Health Plan Information

BABY BOOMERS

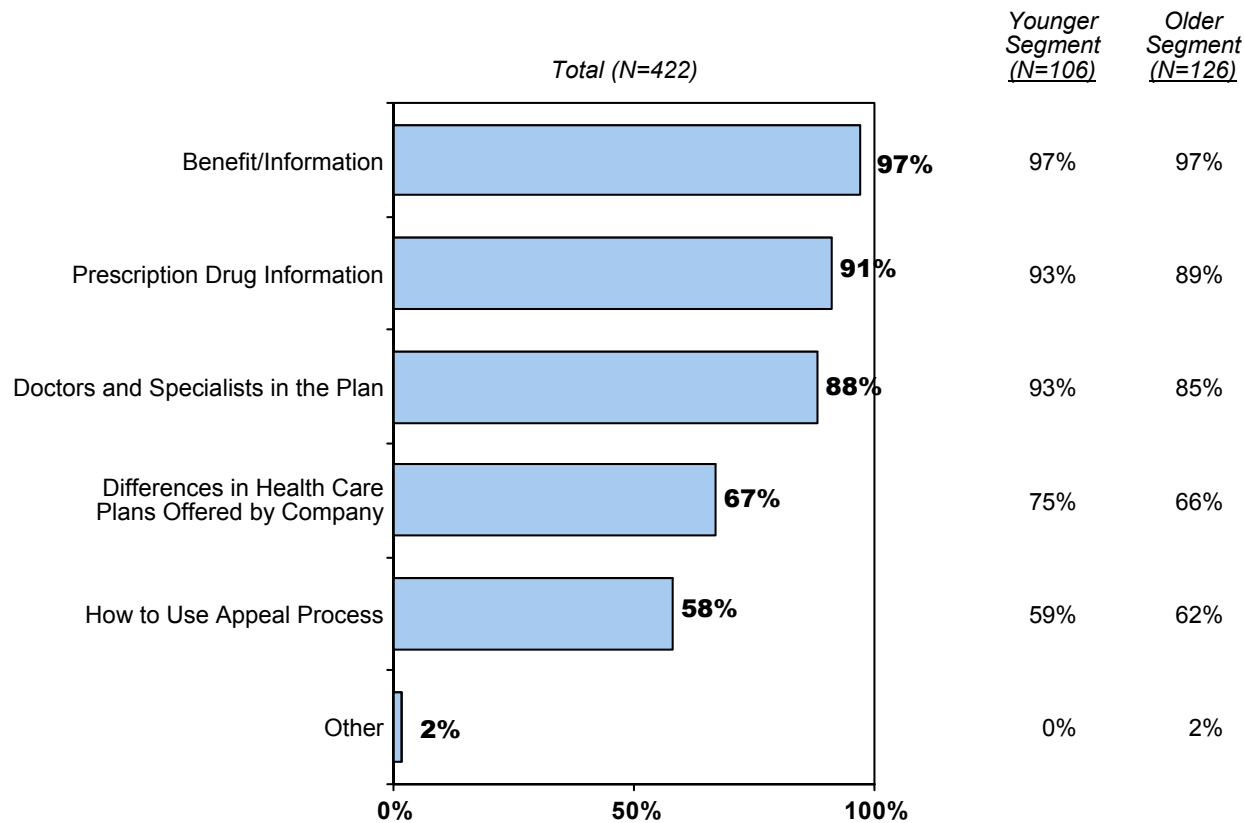
“Are You Interested in Using the Internet to Find Information About Your Health Plan?”



Preference for Access to Health Plan Information

BABY BOOMERS

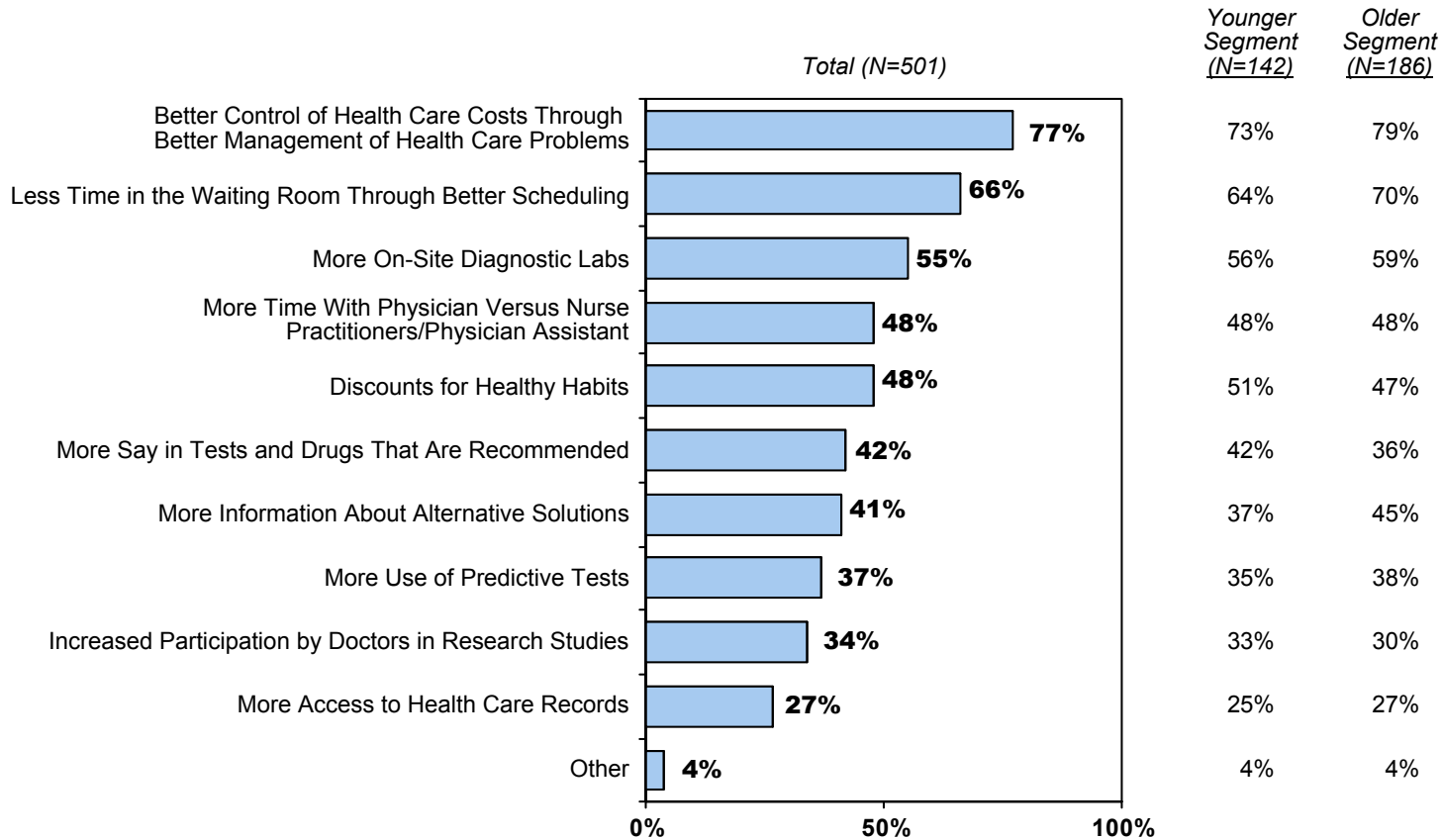
“What Type of (Health Plan) Information Would You Like to Access?”



Preferred Changes in Health Care Management

BABY BOOMERS

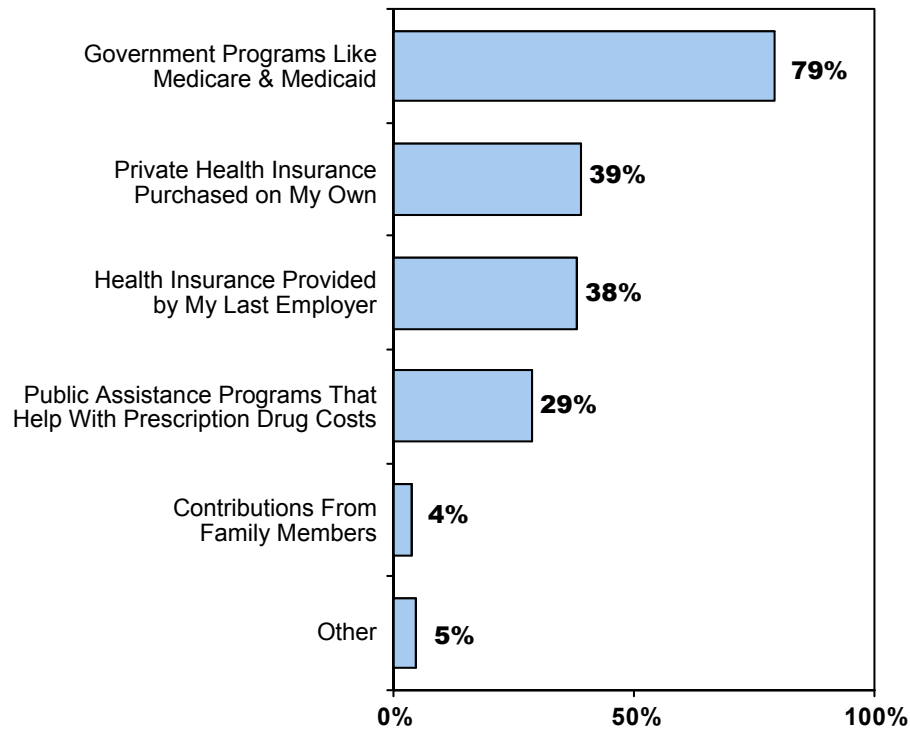
“As Health Care Premiums Costs Increase and You Pay More of Your Health Care Costs..., What Would You Like to See Change in How Your Health Care is Provided?”



Expectations for Payment of Health-Related Needs

BABY BOOMERS

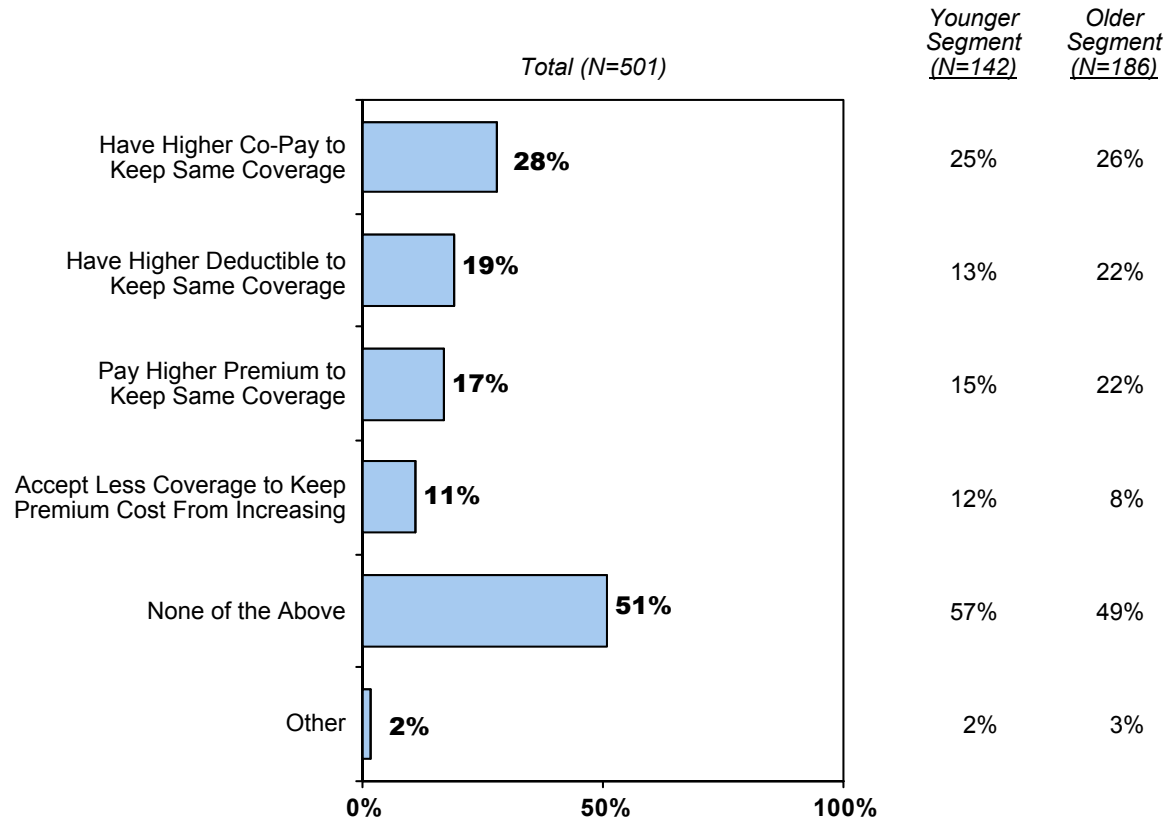
“How Do You Expect to Pay for Your Health-Related Needs As You Get Older?”
(Aided, Multiple Response)



Maintaining Health Plan Coverage in Light of Rising Premiums

BABY BOOMERS

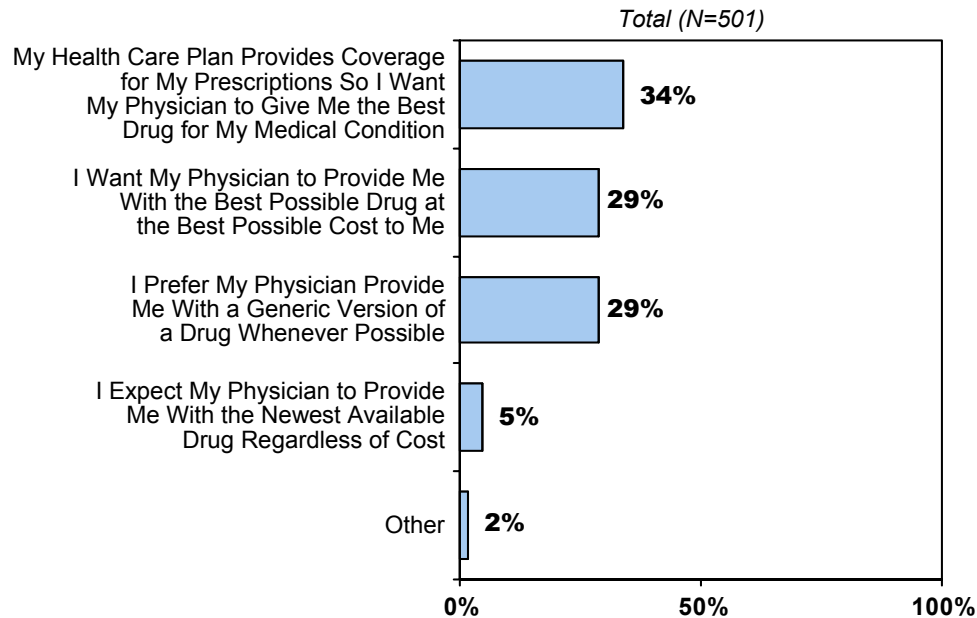
“As Health Care Premium Costs Continue to Rise, What Are You Willing to Do to Keep Your Current Coverage?”



Prescription Expectations

BABY BOOMERS

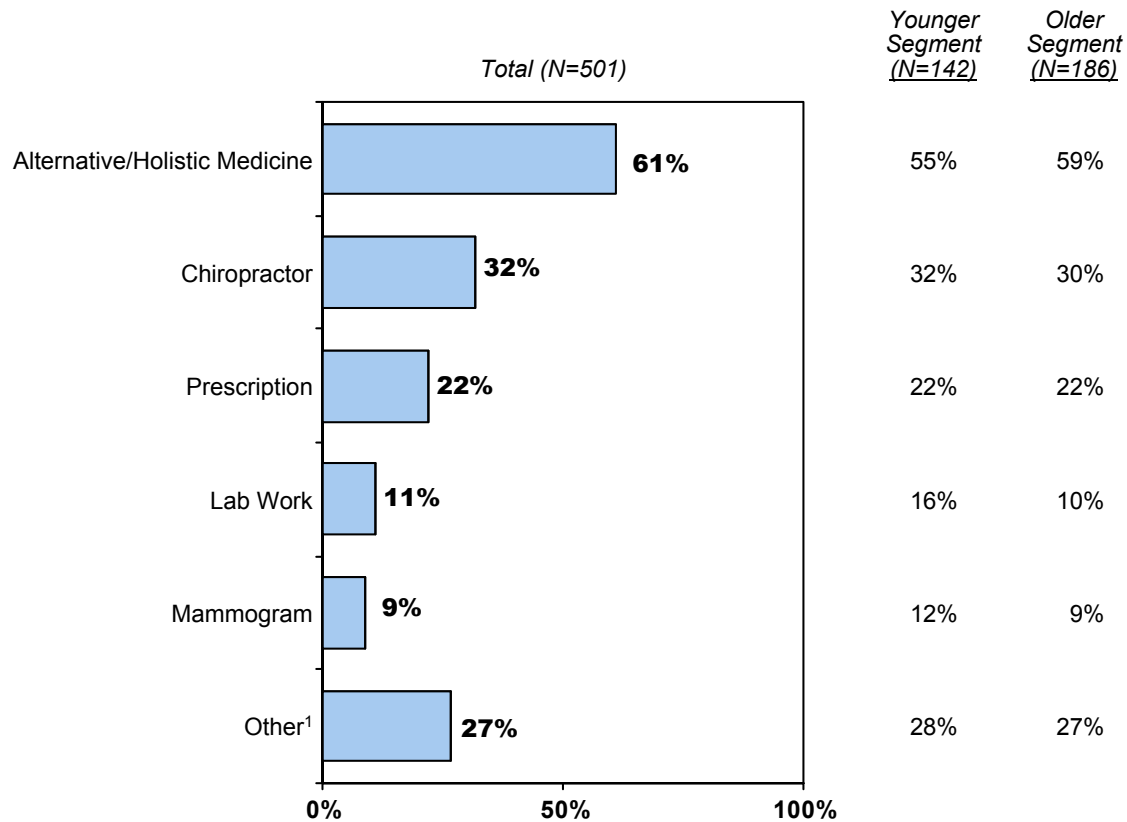
“When Your Physician Recommends a New Prescription for You, Which of the Following Best Describes Your Expectation Regarding That Prescription?”



Healthcare Services Not Covered by Current Plan

BABY BOOMERS

“What Health Care Services Do You Pay for Yourself Because They are Not Covered by Your Health Plan?”

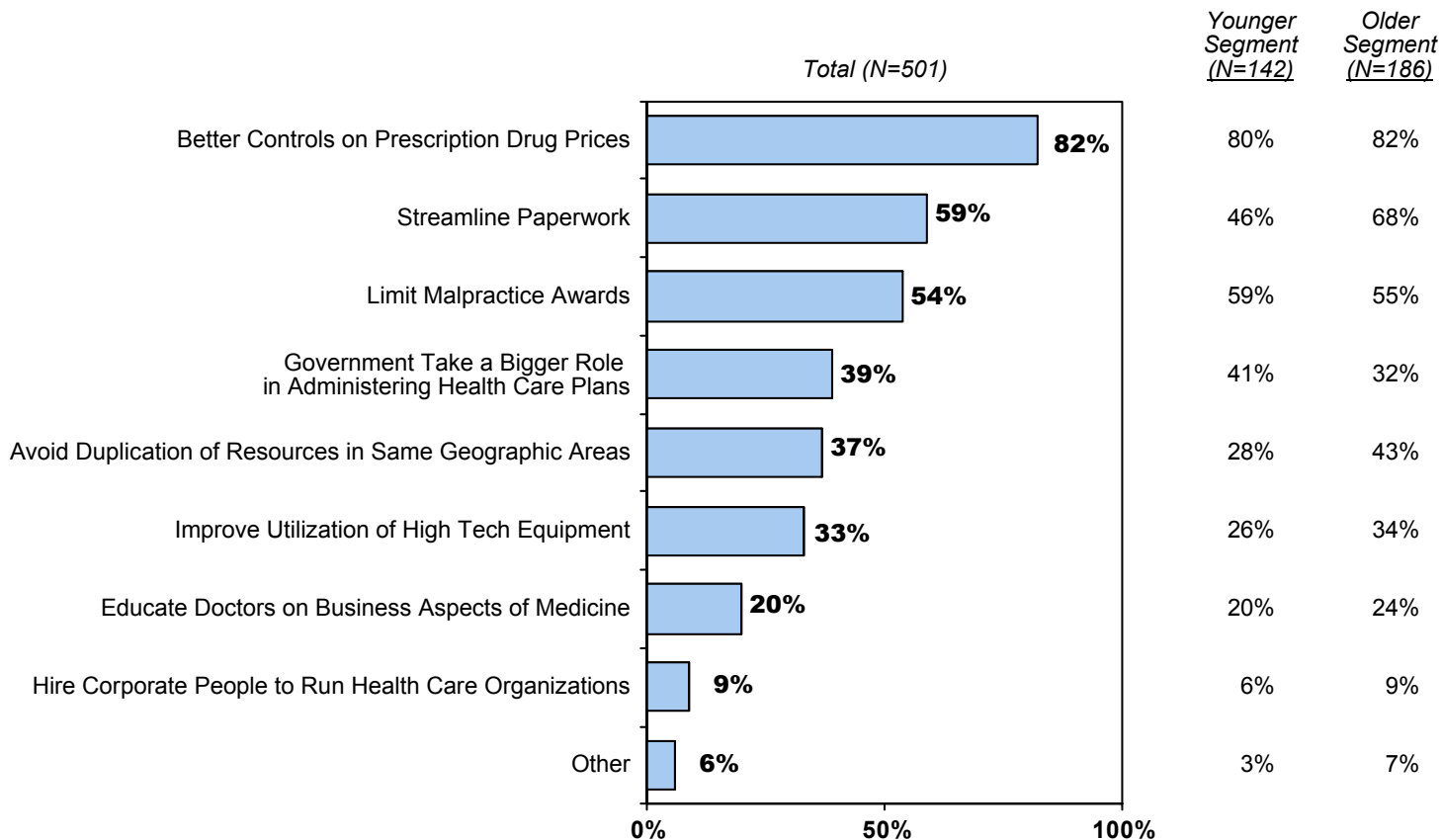


¹ Other includes dental, eye care, and cosmetic surgery.

Suggestions for Healthcare Cost Containment

BABY BOOMERS

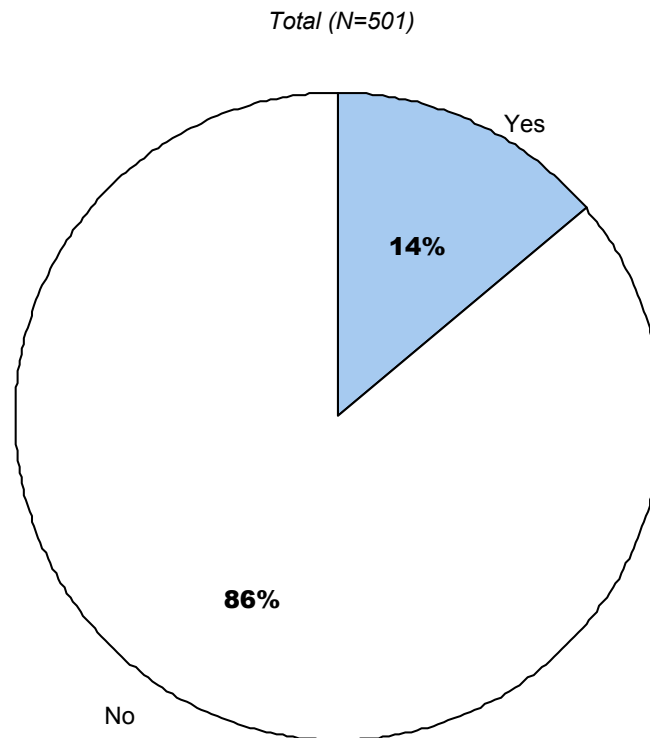
“How Would You Suggest Health Care Costs Be Contained?”



Familiarity with Telemedicine

BABY BOOMERS

“Are You Familiar With the Concept of Telemedicine?”



Expectations for Telemedicine

BABY BOOMERS

*“Telemedicine is... (Explanation Provided). How Important is it to You to Have This Option Covered by Your Health Plan?”
(only asked of those familiar with the concept)*

