



Change Healthcare - Harris Poll Research: Half of Consumers Avoid Seeking Care Because It's Too Hard

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Two-thirds of consumers said the effort required to find, access, and pay for care is excessive and a burden, according to a new study commissioned by Change Healthcare

NASHVILLE, Tenn.--(BUSINESS WIRE)--Jul. 13, 2020-- Finding, accessing, and paying for healthcare in America requires so much work that [half of consumers surveyed by The Harris Poll have avoided seeking care](#). More than two-thirds of consumers said every step of the healthcare process is a chore, most said they don't know how much a treatment or visit costs until months later, and nearly all said they want shopping for healthcare to be as easy as shopping for other common services—including making it a fully connected digital experience¹.

These findings and more are detailed in the [2020 Change Healthcare - Harris Poll Consumer Experience Index](#), a national study of 1,945 consumers conducted by The Harris Poll and commissioned by Change Healthcare. Researchers asked consumers to rate the ease or difficulty required to find, access, and pay for care across 29 tasks, using an index of 1 to 200, with 200 being the "hardest" effort, 1 being "effortless," and anything above 100 being "difficult." The result: Not one healthcare activity was described by consumers as effortless. Rather, consumers ranked the difficulty of dealing with the healthcare system as high as 149, and the average across all tasks at 117.

"When half of consumers say they're avoiding care because the system is too hard to deal with, it has become clear that the effort required to find, access, and pay for care is a social determinant of health," says William Krause, vice president of Connected Consumer Health™ aChange Healthcare. "Consumers want health plans and providers to end the fragmentation, simplify the experience, and deliver a fully connected encounter that makes healthcare as seamless as any other digital endeavor—whether that's shopping for goods, booking a trip, or paying bills. Payers and providers that streamline healthcare for patients and members will gain a competitive advantage in the marketplace."

The study, conducted among 1,945 U.S. adults in May 2020, explored consumer effort throughout the journey of finding, accessing, and paying for healthcare. The Harris Poll combined all tactical-level attributes of the journey into a single summary statistic (the Change Healthcare – Harris Poll Consumer Experience Index) that can serve as a performance benchmark for healthcare year over year. A reading above 100 indicates the task is generally difficult for consumers, while a score below 100 indicates it is relatively easy. The distance from 100 indicates the level of difficulty or ease.

The research segments respondents and insights into six enrollee groups: those with Medicare Advantage plans, high-deductible employer-sponsored health plans, other employer-sponsored plans, individual plans, Medicaid plans, and uninsured. Some of the research's other findings include:

- **A majority of consumers agreed COVID-19 will fundamentally change healthcare delivery** (81%), with most believing the pandemic will speed digital adoption. Eight in 10 said COVID-19 made telehealth "an indispensable part of the healthcare system," 65% said they plan to use telehealth more after the pandemic, and 78% said COVID-19 has shown how badly the U.S. needs more telehealth options.
- **Consumers want accurate cost estimates from payers, and price transparency from providers.** More than half (53%) said they avoided care because they weren't sure what it would cost, 6 in 10 have gone to an appointment without knowing if they could afford it, 68% reported they don't know how much a treatment or appointment will cost until months later, and an overwhelming 85% said it should be as easy to compare prices for healthcare as it is for other consumer services.
- **Consumers find the healthcare system overwhelmingly and unnecessarily complex.** A majority of consumers (62%) said the healthcare system feels like it's designed to be confusing, 61% reported their bills feel more complex than a mortgage payment, and two-thirds said they are asked to manage so many care-related tasks that they "feel like a general contractor" when it comes to addressing their healthcare needs.
- **Consumers want better, clearer, easier communications from health plans and providers, with a preference for digital channels.** One chief request is for a simple, transparent Explanation of Benefits (EOB)/explanation of charges. Only 1 in 3 consumers said their provider and health plan communicate too much. The vast majority said they want their health plan (71%) and provider (68%) to communicate using more modern platforms.
- **Health plans and providers need to prioritize winning with the all-digital consumer.** Consumers overwhelmingly are seeking a retail-like e-commerce experience when it comes to shopping for care: 81% said shopping for healthcare should be as easy as shopping for other common services, 76% said they wish there was a single place they could shop for and buy healthcare, and 67% said they want to shop for healthcare entirely online.

"The majority of consumers said their healthcare experience is a struggle that's taxing and burdensome, as illustrated through the difficulty they expressed at every phase of finding, accessing, and paying for care," said Abbey Lunney, director at The Harris Poll. "In an e-commerce world, consumers want the experience of shopping for healthcare to be simple and streamlined. And this has never been more important, as digital

healthcare reaches a tipping point amidst the COVID-19 pandemic.”

The [2020 Change Healthcare – Harris Poll Consumer Experience Index](https://www.changehealthcare.com/consumer-experience-research) is available for download at <https://www.changehealthcare.com/consumer-experience-research>. For more information on solutions that can help payers and providers improve the consumer experience by making it easier to find, access, and pay for healthcare, please visit <https://www.changehealthcare.com/contact>.

For more information on Change Healthcare, please visit our [website](#), hear from our experts at [Insights](#); Follow us on [Twitter](#); Like us on [Facebook](#); Connect with us on [LinkedIn](#); and Subscribe to us on [Libsyn](#), [Apple Podcasts](#), [Google Podcasts](#), and [YouTube](#).

About The Harris Poll

The Harris Poll is one of the longest-running surveys in the U.S. tracking public opinion, motivations, and social sentiment since 1963, and is now part of Harris Insights & Analytics, a global consulting and market research firm that delivers social intelligence for transformational times. We work with clients in three primary areas: building twenty-first-century corporate reputation, crafting brand strategy and performance tracking, and earning organic media through public relations research. Our mission is to provide insights and advisory to help leaders make the best decisions possible. To learn more, please visit www.theharrispoll.com.

About Change Healthcare

Change Healthcare (Nasdaq: CHNG) is a leading independent healthcare technology company that provides data and analytics-driven solutions to improve clinical, financial and patient engagement outcomes in the U.S. healthcare system. We are a key catalyst of a value-based healthcare system, accelerating the journey toward improved lives and healthier communities. Learn more at changehealthcare.com.

¹ 50% said they have avoided seeking care. 67% said every step of the healthcare process is a chore. 68% said they don't know how much a treatment or visit costs until months later. 81% said they want shopping for healthcare to be as easy as shopping for other common services. 67% said they want a fully digital experience.

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Change Healthcare
Kerry Kelly
External Communications
339-236-2756
kerry.kelly@changehealthcare.com

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