



## Inaugural Health Ambitions Study

Exploring consumer and provider perceptions about the challenges of navigating a complex health care system, personal health ambitions and the transformation of care

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# The transformation of health care

The American health care industry is undergoing a historic transformation from fee-for-service to fee-for-value, placing [better patient outcomes, increased affordability and an improved patient experience](#) at the center of care. As value-based care (VBC) and other innovative care delivery models come to the forefront, one thing remains true: We live in a highly-personalized, convenience-oriented world, and people expect the same level of customization when seeking solutions to their own health care needs.

Aetna's inaugural Health Ambitions Study explores the transformation of care, examining health goals and preferences, as well as relationships among patients and providers in the evolving health landscape.

The research finds that people are looking at their health holistically—from physical activity to mental health and stress reduction—and they desire access and flexibility to reach their unique health goals. To better navigate their individual, yet holistic health needs, consumers show interest in digital communication tools and enhanced community resources. Optimistically, health providers and physicians in value-based care models feel positive about the future impact of the transformation of care delivery on their patients' health.

This summary provides a look at the Aetna inaugural Health Ambitions Study research and data, as well as steps that Aetna is taking to help its members meet their individual health needs.

# A holistic health lens

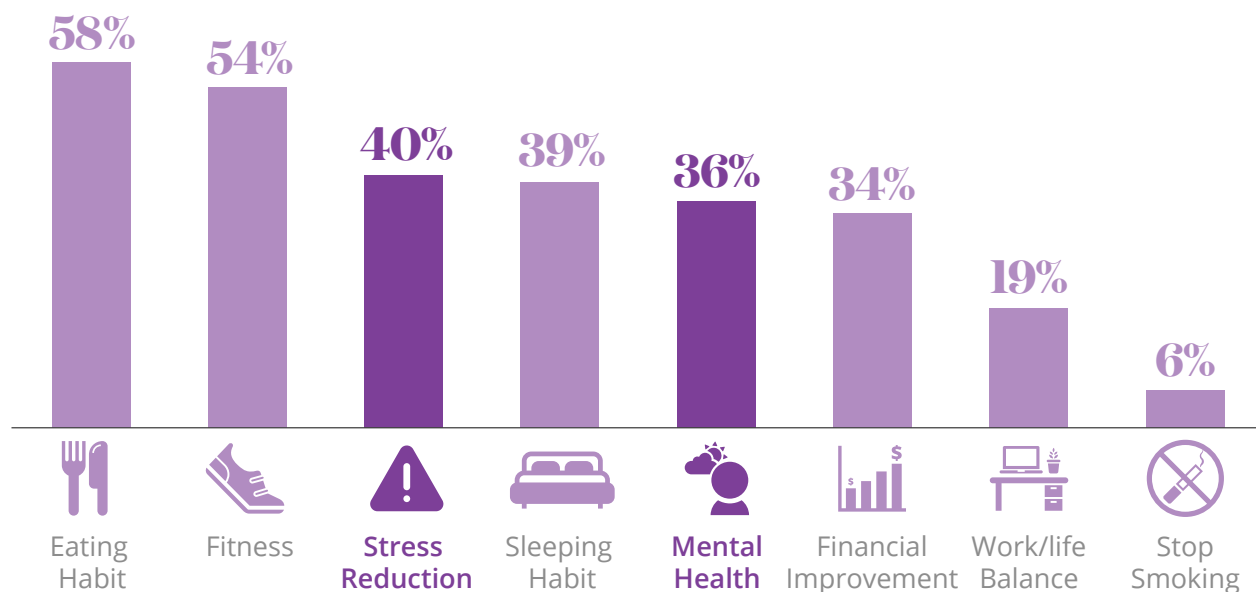
Unsurprisingly, healthy eating and fitness lead people's health ambitions, with 58 percent and 54 percent of consumers, respectively, citing these as current health goals. However, overall wellbeing has become more central to people's understanding of their own health. Forty percent of consumers say they have a stress reduction health goal, and 36 percent say they have a mental health goal—beating financial improvement (34 percent), work-life balance (33 percent) and quitting smoking (19 percent) goals.

With an eye toward holistic health, people are spending time on activities that address wellness. If given an extra hour in the day, 60 percent of people would spend it on physical and mental wellbeing

activities, such as yoga, meditation and walking—the top reported answer overall. This is followed by reviewing daily health tracking information (31 percent) and reviewing financial budgets (29 percent).

While more than one-third of consumers have either a stress reduction goal or mental health goal, those goals prove difficult to tackle alone. Consumers with stress reduction and mental health goals most frequently report making just some or a little progress toward their goals (64 percent and 61 percent, respectively). More than half (51 percent) of people with mental health goals who haven't made significant progress say that the goal is too big to achieve without help.

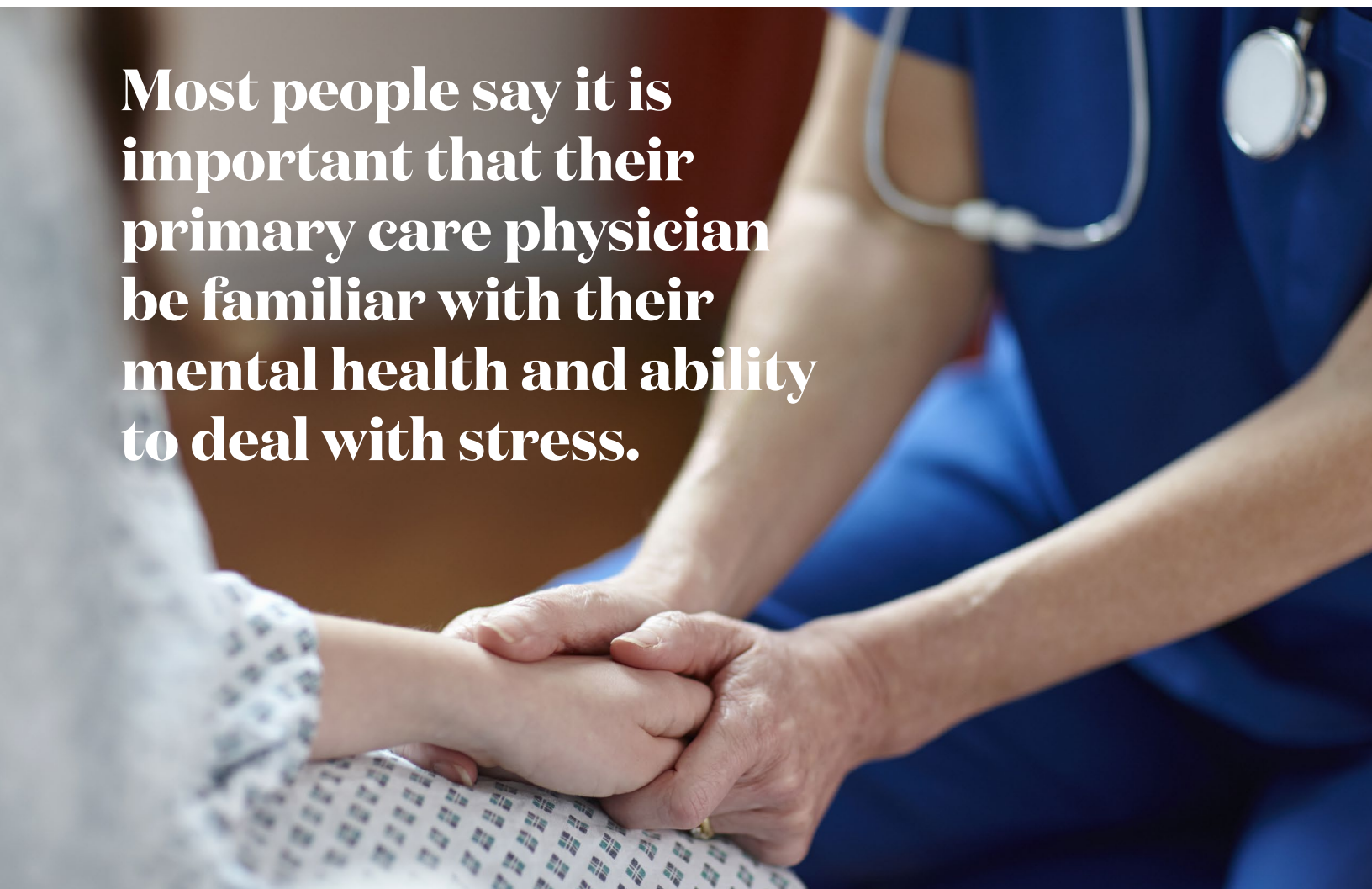
## What health goals do people have?





Physicians play a critical role in the network of support for patients' holistic health, and emerging health delivery models provide opportunities for patients and physicians to collaborate. Most people say it's important that their primary care physician be familiar with their mental health history

(86 percent) and their ability to deal with stress (84 percent). Additionally, 30 percent of all people say that direct conversations with a health and wellness specialist would help them achieve their health goals.



**Most people say it is important that their primary care physician be familiar with their mental health and ability to deal with stress.**

#### **Aetna in Action**

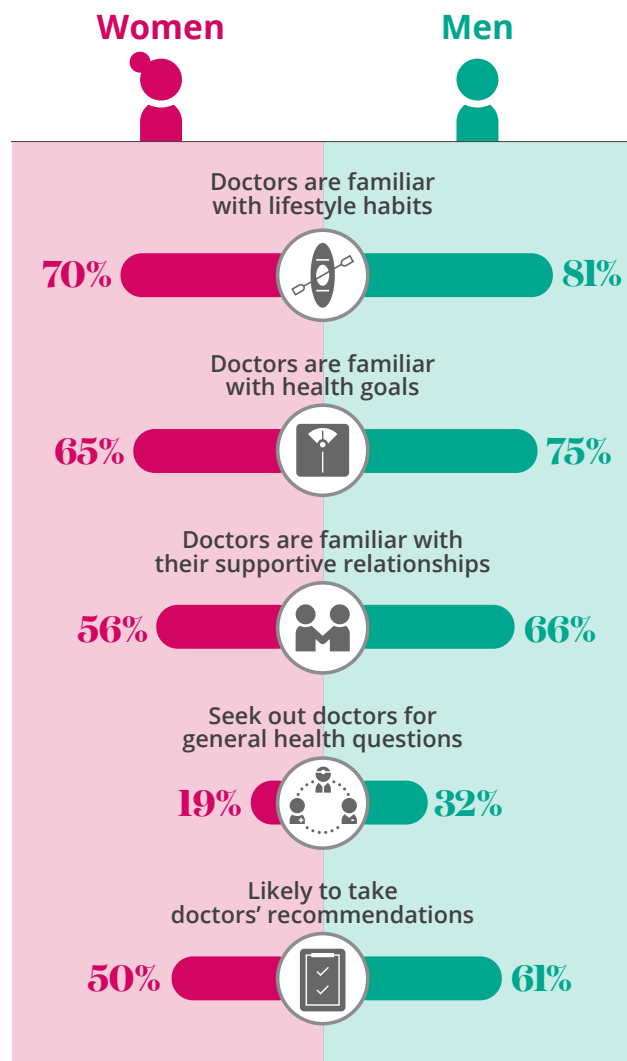
The Aetna Foundation and U.S. News & World Report's inaugural [Healthiest Communities](#) ranking found that a full view of health includes looking at a multitude of factors. Now, Aetna has partnered with the Harvard T.H. Chan School of Public Health on a [multi-year research project](#) aimed at better understanding the determinants of well-being, including correlations to population health and productivity. The research looks at six aspects of health—physical, emotional, social connectedness, financial security, purpose and character strengths. By examining health holistically, Aetna is able to create innovative programs that improve the overall well-being of our members.

# Differing health care experiences by gender

Women show a heightened interest in holistic health—67 percent say they would devote an extra hour a day on wellbeing activities, compared to 44 percent of men. Additionally, of those consumers with stress reduction goals, 79 percent are women; of those with mental health goals, 72 percent are women.

Still, women report vastly different experiences than men when it comes to their physicians' understanding of aspects of their personal lives that impact health. More men than women say their doctors are familiar with their lifestyle habits, their health goals and the supportive relationships in their lives. Women less frequently seek out their primary care physicians for general health questions, and fewer women are likely to take their doctors' recommendations.

## Gender differences in health navigation



In today's changing health care environment, women are most interested in flexible information sharing to improve their communication with physicians. Women place high value on physicians who help them understand test results (83 percent), talk in a way that is easy to understand (81 percent) and spend enough time with them (81 percent), compared to 67 percent, 67 percent and 66 percent of men, respectively.

Additionally, 71 percent of women say coordination among all their health care providers is very important to their health, highlighting the importance of new care models that include resources such as care coordinators.



Women say they need more flexible, collaborative communication options with their doctors.

#### **Aetna in Action**

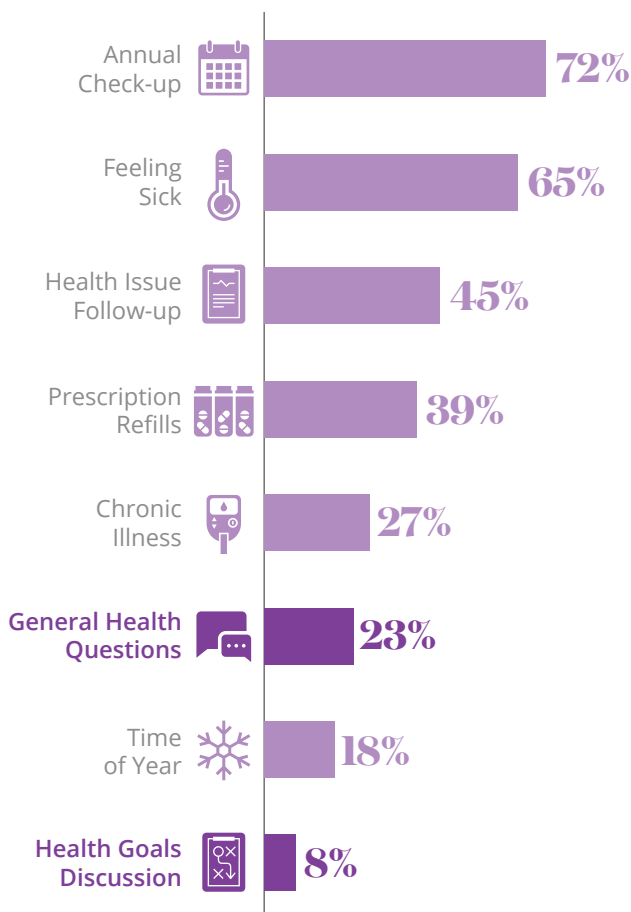
To better meet needs of how consumers want to navigate health, Aetna has created Community Care—a new program designed to provide local, in-person, personalized support for certain members who have difficult health conditions. Engagement specialists connect members to field care managers and social workers who serve as “clinical quarterbacks.” Clinical quarterbacks meet with members and their caregivers face-to-face in members’ homes, local hospitals, nursing facilities or even local libraries—wherever the member is most comfortable. Clinical quarterbacks then work together with members, their providers and community groups to develop action plans. This community-centered, multi-disciplinary approach helps our members overcome everyday barriers to achieving their best health.

# Flexibility through digital tools

Most people communicate with their health care provider for either annual check-ups (72 percent) or feelings of sickness (65 percent). Just 23 percent of consumers communicate with their primary care physician to ask general health questions, and only eight percent do so to discuss progress on their health goals, pointing to an opportunity to enhance patient-provider relationships.

With greater flexibility—often in the form of digital tools—patients would be more likely to communicate with health professionals. More than one-third (37 percent) of people say digital messaging through email, text or a patient portal would make them more likely to communicate with their doctors, and 32 percent say virtual office visits would make them more likely to do so.

## What most often prompts a visit or communication with a doctor?



For both younger consumers and physicians, the value of digital communication resources is clear. People ages 18-50 are more likely to say apps would be helpful in making regular progress toward their health goals, compared to people ages 51 and over. The majority of people ages 18-50 say they would be likely to use a confidential website or app to track health information. Millennials are already doing so, with 40 percent of people ages 18-34 currently using a computer or electronic diary and 30 percent using a wearable tracker to collect information about their personal health.

Doctors with 15 years or fewer experience are more inclined to use digital tools—23 percent say they would use digital messaging, 22 percent say tele-health and 18 percent say virtual office visits, compared to 17 percent, 15 percent and 7 percent, respectively, of doctors with more than 15 years of experience.



# Consumers ages 18-34 rely on digital tools to navigate health

43%

say apps would help them make regular progress toward health goals

40%

are already using a computer/electronic diary to track health information



81%

say they would use a confidential website or app to track health information

30%

are already using a wearable tracker to collect personal health data

## Aetna in Action

As Aetna moves toward becoming a health and wellness partner for consumers at large, we are redefining care management to better meet expectations. Our digital platform is comprehensive and innovative – delivering a rich, seamless user experience that enables our **Aetna One Advocate** members to reach their own health potential by providing a single point of entry into a personalized digital platform. **Aetna Health** is a critical component of our digital transformation that allows us to support members everywhere along their health journey. Additionally, Aetna is investing heavily in technology that delivers personalized experiences and integrates physical and behavioral care for our members. The recently debuted **Aetna One Advocate** is a high-touch, personalized care and support service, backed by a dedicated, multidisciplinary team, that helps members achieve their health goals. Aetna has also [partnered with the telehealth company AbleTo](#) for the last six years to offer better treatment for members' depression, anxiety and stress that often accompany medical health issues. The program addresses behavioral, medical, and life event comorbidities by proactively identifying members in need and connecting them to a nationwide network of licensed therapists and behavior coaches.



# Navigating health with the Sandwich Generation




The Sandwich Generation—people who are responsible for navigating the care of both their children and parents, as well as their own health—has much to juggle. As such, they are more likely than their peers to use resources that help track health and provide advice, from apps, wearable trackers and written diaries, to internet searches and conversations with family and friends.

In line with their heavy care navigation needs, the Sandwich Generation is highly communicative with their physicians regarding their health ambitions. More than two-thirds (69 percent) of the Sandwich Generation say their primary care physicians ask about their health goals and they share information about those goals with their physicians. Perhaps as a result, the Sandwich Generation is confident




in their ability to meet their health goals—58% of people with health goals in this generation have nearly completed or made significant progress toward completing them. Almost all (91 percent) are confident in their ability to make significant progress on their goals in the next year.

More than three-quarters (85 percent) of people in the Sandwich Generation say their physicians spend enough time with them to provide information and answer questions. Still, there is room to grow—to improve communication, the Sandwich Generation is interested in later office hours (48 percent), virtual office visits (48 percent), earlier office hours (42 percent) and tele-health (42 percent), pointing to the importance of flexibility in care delivery.

## The Sandwich Generation is more likely than their peers to use resources to track their health

| Tracking Personal Health   |  App |  Wearable Tracker |  Written Diary |
|----------------------------|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Sandwich Generation</b> | 51 percent                                                                              | 41 percent                                                                                           | 35 percent                                                                                          |
| <b>At Least One Child</b>  | 33 percent                                                                              | 28 percent                                                                                           | 27 percent                                                                                          |
| <b>At Least One Parent</b> | 24 percent                                                                              | 24 percent                                                                                           | 12 percent                                                                                          |
| <b>Neither</b>             | 17 percent                                                                              | 13 percent                                                                                           | 11 percent                                                                                          |

| Seeking Health Advice      |  Internet Searches |  Partner, Spouse, Family |  Friends |
|----------------------------|-------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <b>Sandwich Generation</b> | 65 percent                                                                                            | 45 percent                                                                                                  | 42 percent                                                                                    |
| <b>At Least One Child</b>  | 55 percent                                                                                            | 39 percent                                                                                                  | 36 percent                                                                                    |
| <b>At Least One Parent</b> | 34 percent                                                                                            | 28 percent                                                                                                  | 24 percent                                                                                    |
| <b>Neither</b>             | 49 percent                                                                                            | 25 percent                                                                                                  | 25 percent                                                                                    |

The Sandwich Generation has heavy care navigation needs, and they are highly communicative with their physicians about their health goals.



### **Aetna in Action**

For many members of the Sandwich Generation, helping parents and family members select the right Medicare plan is a critical responsibility. It's important to consider current health, health goals, budget and lifestyle. Aetna offers several types of Medicare plans to suit different needs. In addition, resources such as Medicare Star Ratings can help caregivers and family members compare plans and select the one that's best for their loved ones.

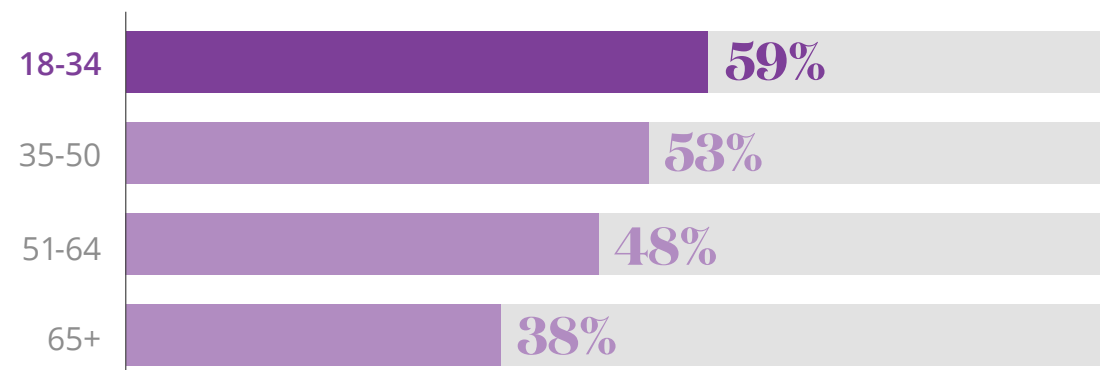
# The economics of health

Privacy and data security lead patients' concerns in the changing health environment; however, costs remain a critical component. Nearly three-quarters (73 percent) of people indicate it is very important to their care, and 68 percent have made a health goal to reduce care costs.


To better understand the cost of care, patients seek information from their physicians, with 51 percent saying it is very important that their primary care physicians help them understand the costs of care. This is of particular significance to Millennials, who may have less experience navigating health care than older patients.

Notably, 57 percent of all patients feel that their primary care physicians always or often meet their needs in helping understand the cost of care. Yet, patients express the need for more resources to help them reach their goals—25 percent of those who previously had a health goal say having additional resources would have been helpful in achieving their goals. Additionally, nearly one-third (33 percent) of consumers say financial resources, such as a gym membership, would be helpful in making progress toward their goals.

## Patients say it is very important for physicians to address the cost of care





A woman with short dark hair, wearing a yellow apron over a white and yellow striped shirt, is smiling while talking on a black mobile phone. She is also holding a white card in her left hand. The background is a blurred pharmacy or store with shelves of products.

**Patients feel their physicians help them understand the costs of care, but they seek additional financial resources to address those costs.**

#### **Aetna in Action**

A new [Aetna collaboration with Meals on Wheels \(MOW\)](#) helps volunteers improve care coordination for our most vulnerable seniors through regular home check-ins. During daily meal delivery services, MOW volunteers check in with Aetna members in their homes and observe any changes in the member's social, physical or behavioral condition. If a MOW volunteer notices that the member's condition has changed, he or she notifies a MOW care manager immediately through a technology platform that signals the member's need. MOW then works with the Aetna Case Manager to address the issue with the member. By integrating social services into a member's care plan, Aetna is helping this vulnerable population improve their quality of life and potentially reduce or delay the need for acute clinical interventions.



# The future of value-based care

**Value-based care** aligns incentives between payers and providers to create a connected, easier-to-navigate, outcomes-focused health care experience for consumers. The focus on patient outcomes helps ensure that providers understand and address their patients' needs toward achieving their health goals.

For example, 62 percent of physicians in value-based care models say helping patients understand test results has a high impact on achieving the desired outcomes, aligning with the 78 percent of patients who say it is very important for their physicians to do so. Comparatively, 47 percent of physicians who are not in value-based care models believe this activity has a high impact on outcomes.

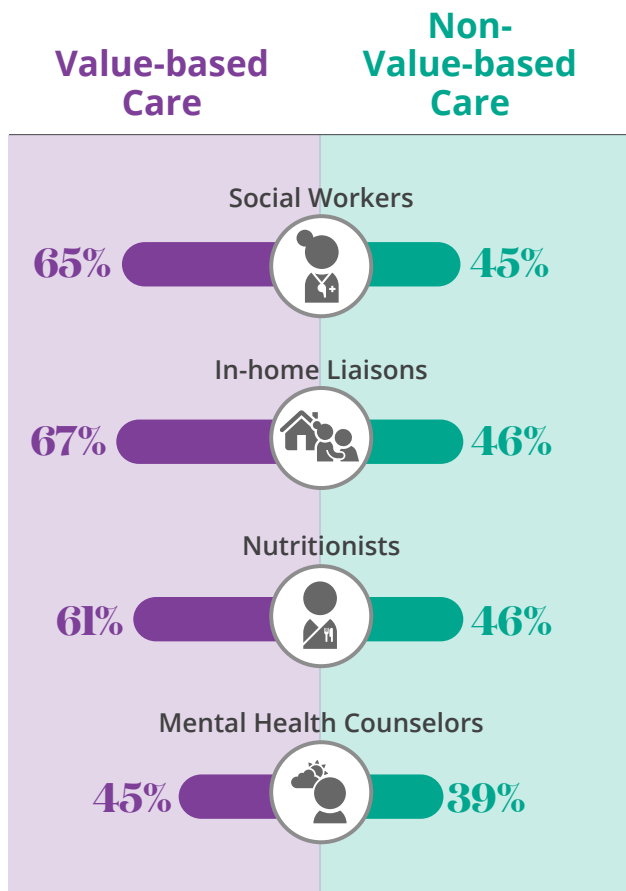
Physicians involved in value-based care models focus on helping their patients achieve their health goals.

Perhaps as a result of this focus on outcomes, 70 percent of physicians in value-based care models always or often recommend that their patients set health goals, compared to 54 percent of physicians not in value-based care models.



Additionally, physicians in value-based care models report greater access to community resources and coordinators than those not in value-based care models, including social workers, in-home liaisons, nutritionists and mental health counselors.

**Doctors in value-based models report having better access to community-based resources for their patients**



This access better enables them to meet the unique, holistic health needs of their patients with customized combinations of solutions.

Given their high levels of access, physicians in value-based care models more frequently recommend community resources to their patients that can help them make progress on their wellness goals, including the services of mental health professionals (92 percent vs. 80 percent), care managers (62 percent vs. 37 percent) and health coaches (46 percent vs. 24 percent).

The future of value-based care is bright, according to physicians who practice in these care models. Sixty percent believe that long-term patient attitudes toward this type of care will be favorable, and 64 percent believe the impact of this care on their patients' health will be favorable.

Physicians in value-based care models more frequently recommend community resources to their patients, including the services of mental health professionals, care managers and health coaches.

**Aetna in Action**

As part of the transition to value-based care and affordable care options, Aetna has forged joint venture collaborations with five health systems across the U.S. to deliver affordable, high-quality and integrated health care coverage to people and employers. In joint ventures, doctors work collaboratively together and share what they've learned to improve patient satisfaction and deliver improved health outcomes. Aetna provides comprehensive, cutting-edge data and analysis that helps providers provide members with the care they need as quickly and efficiently as possible. Aetna and the health systems we partner with are committed to designing and delivering a streamlined, convenient, and connected customer service experience.

# Making health transformation real

Patients are at the very heart of health care delivery transformation in the U.S. To achieve that transformation, we need a better understanding of consumers' health ambitions, as well as the lifestyle factors and holistic health needs that affect their ability to reach those goals.

Aetna is focused on this future, with a care transformation philosophy and strategy that takes a holistic approach to care management and delivery, integrates critical community-based resources and proactively engages with members on their health goals.

As care models continue to evolve, so will Aetna, placing an emphasis on access to local, consumer-centric care that occurs in both the community and the workplace. Aetna is partnering with its members to help them achieve their health ambitions. From community resources that address social determinants of health, to tele-health services and customizable digital solutions, to value-based care models that are dramatically improving member outcomes and affordability, Aetna is working to change the very nature and future of health care in the U.S.

## Methodology

Aetna's inaugural Health Ambitions Study was conducted in December 2017 and included two distinct surveys fielded by Market Measurement, a custom market research firm. The consumer survey comprised 1,000 responses from consumers 18 and older. The physician survey comprised 400 responses divided among 200 primary care doctors and 200 specialists, with at least two years of experience. For several questions, respondents were asked to select all answers that apply.

### About Aetna

Aetna is one of the nation's leading diversified health care benefits companies, serving an estimated 40.3 million people with information and resources to help them make better informed decisions about their health care. Aetna offers a broad range of traditional, voluntary and consumer-directed health insurance products and related services, including medical, pharmacy, dental and behavioral health plans, and medical management capabilities, Medicaid health care management services, workers' compensation administrative services and health information technology products and services. Aetna's customers include employer groups, individuals, college students, part-time and hourly workers, health plans, health care providers, governmental units, government-sponsored plans, labor groups and expatriates. For more information, see [www.aetna.com](http://www.aetna.com) and learn about how Aetna is helping to build a healthier world. @AetnaNews

