

What Consumers Want

Understanding Post-Acute Patients and Families

Patient choice is critical in post-acute and long-term care. To learn what patients and their loved ones want when making that choice, we conducted a national consumer survey measuring preferences on everything from care delivery to décor. Four major lessons stood out.



Lesson 1: Individuals are cost-conscious—but want top quality for their loved ones

WHAT YOU SHOULD KNOW

When consumers make decisions about post-acute care for themselves, **affordability ranks higher than any other criteria**, including quality, convenience, and amenities.

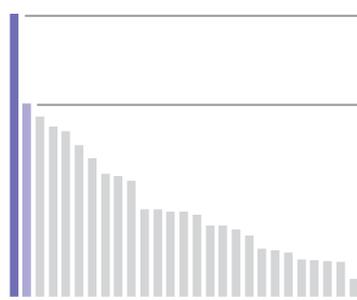
When consumers are seeking long-term care for loved ones, priorities change—quality is more important than cost for long-term care and equally important for short-term care.

HOW WE KNOW

For their own post-acute rehabilitative care, consumers care substantially more about affordability than any other criteria.

Consumers' number one ranked choice is **42%** more important than the second-ranked choice

Cost Critically Important to Rehab Patients



"My insurance will cover the vast majority of costs to receive treatment at this facility."
RANK 1

"I can receive all of my treatment in my home."
RANK 2



NEXT STEPS

Attract Consumers and Their Loved Ones

To attract consumers seeking care for themselves, emphasize affordability. Be forthright about cost and provide easily understandable and accessible pricing information.

To draw family members making patient care decisions, highlight the quality of services—emphasize staff attentiveness, resident satisfaction, and superior clinical care.

Lesson 2: High-quality specialization matters more than general provider quality

WHAT YOU SHOULD KNOW

Consumers value **specialization more than overall ratings**. This may be because consumers struggle to understand the meaning of overall ratings and how those ratings might relate to a patient's specific care needs.

In fact, specialization criteria are twice as important as overall quality indicators in respondents' deliberations about short-term stroke care for loved ones.

HOW WE KNOW

In all health care scenarios, consumers rank specialization and targeted quality indicators far above general quality rankings when making decisions for loved ones.

The availability of specialized treatment is as important as all four overall quality metrics **COMBINED**

Specialization Outweighs Overall Rankings Among Family Members of Long-Term Care Patients



1ST
SCORE 7.73
"All staff at the facility have special certifications in caring for dementia patients."

8TH
SCORE 4.91
"The provider has a good score on a Medicare quality comparison website."
Highest ranked overall quality statement



NEXT STEPS

Showcase Quality Designations That Matter to Consumers

Highlight quality by displaying service-specific certifications or quality indicators rather than overall star ratings or recognition on top 100 lists, which may not be relevant to consumers.

Consider incentivizing staff to obtain specialty certification in disease or rehabilitation areas relevant to your organization's overall areas of expertise.

Lesson 3: Consumers want one-stop convenience

WHAT YOU SHOULD KNOW

As much as consumers value specialization, they strongly prize the convenience of a post-acute provider with the **capabilities to meet all of their expected needs** across the duration of their episode.

HOW WE KNOW

Attributes specific to stroke care and access to a range of services are ranked among the top 25% of criteria for choosing a post-acute facility, indicating a strong desire for both.

32% of care decisions for a loved one after a stroke are based on specialization and convenience factors

Importance of Factors



Factors related to stroke care specialization
RANKS 2, 3, 5

Factors related to convenience and access to additional services
RANKS 4, 6



NEXT STEPS

Become a One-Stop Shop for All Post-Acute and Senior Consumer Needs

To deliver convenience while maintaining a high level of quality, develop in-house specialization and build a network of providers to ensure that consumers have easy access to other necessary services.

Wherever possible, coordinate care offerings for delivery by members of your own care team, either through network partners or by adding additional

Lesson 4: Physician opinions matter

WHAT YOU SHOULD KNOW

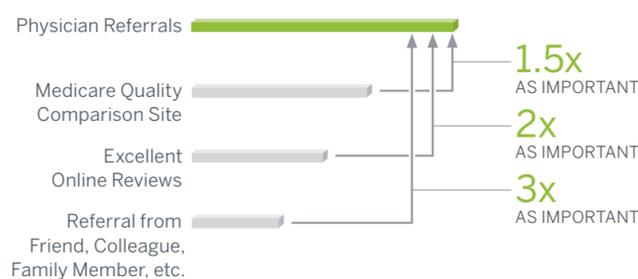
Physician recommendations **weigh more strongly** in consumers' decision-making processes about short-term post-acute care for themselves and loved ones than any other source of referral or rating. Consumers often have little time to research providers themselves and value the expertise and convenience of physician referrals.

HOW WE KNOW

Respondents consistently value physician referrals as much or more than quality ratings, online reviews, and government recommendations.

One exception to the rule is senior living, where physician referrals are **LESS** important than cost and convenience factors

Importance of Factors



Physician Referrals
Medicare Quality Comparison Site
Excellent Online Reviews
Referral from Friend, Colleague, Family Member, etc.

1.5x
AS IMPORTANT
2x
AS IMPORTANT
3x
AS IMPORTANT



NEXT STEPS

Get Physicians on Board

Prioritize relationships with physicians to improve care coordination and increase physicians' confidence in your care delivery. This can include implementing shared care pathways with select partners.

Consumers often rely on physicians because they lack a way to learn about providers on their own. Offer online and call-center-based resources for patients and families to understand your quality and offerings.