

Scoring healthcare: Navigating customer experience ratings

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Customer Experience Series
Health Research Institute

Agenda

#	Topic
I	Research overview
II	The state of reviews and ratings
III	Consumers' use of healthcare ratings
IV	Opening up data is the first step for consumer engagement
V	Turning scores into action and going beyond scores
VI	What this means for your business
VII	Q&A

About our research

- Conducted 25 interviews with executives and thought leaders representing providers, insurers, pharmaceutical companies, trade associations, foundations, ratings organizations, and retail companies
- Surveyed 1,000 adults representing the US demographics of age, sex, insurance status, income level, area of residence, US region, education level (HRI 2012 consumer survey)
- Tracked the social media activity of a number of social media sites and online patient communities to create a two year snapshot of activity

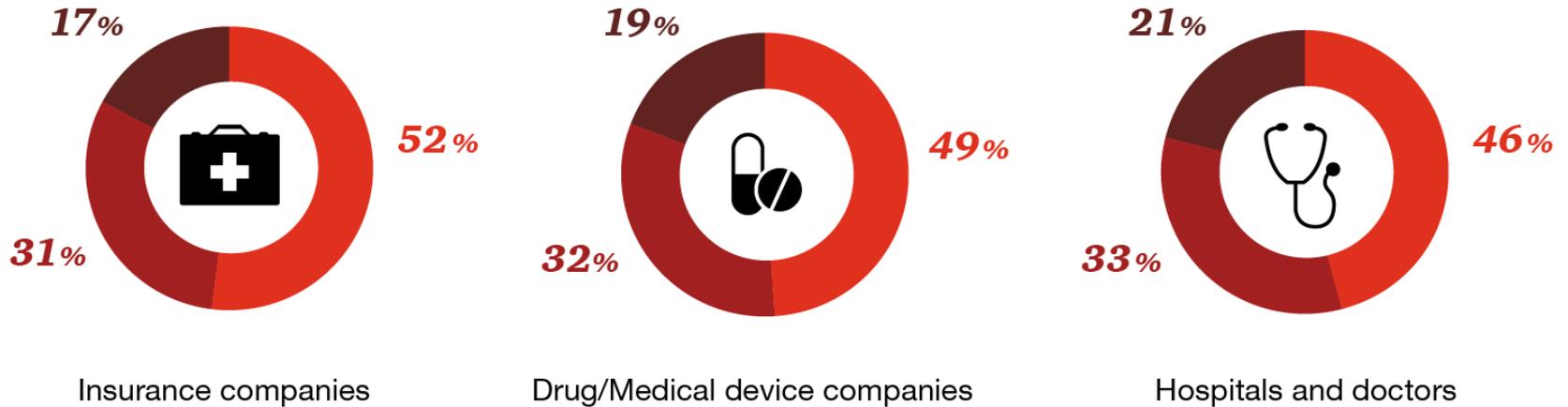


The state of ratings and reviews

Consumers want their feedback tied to healthcare companies' financial rewards

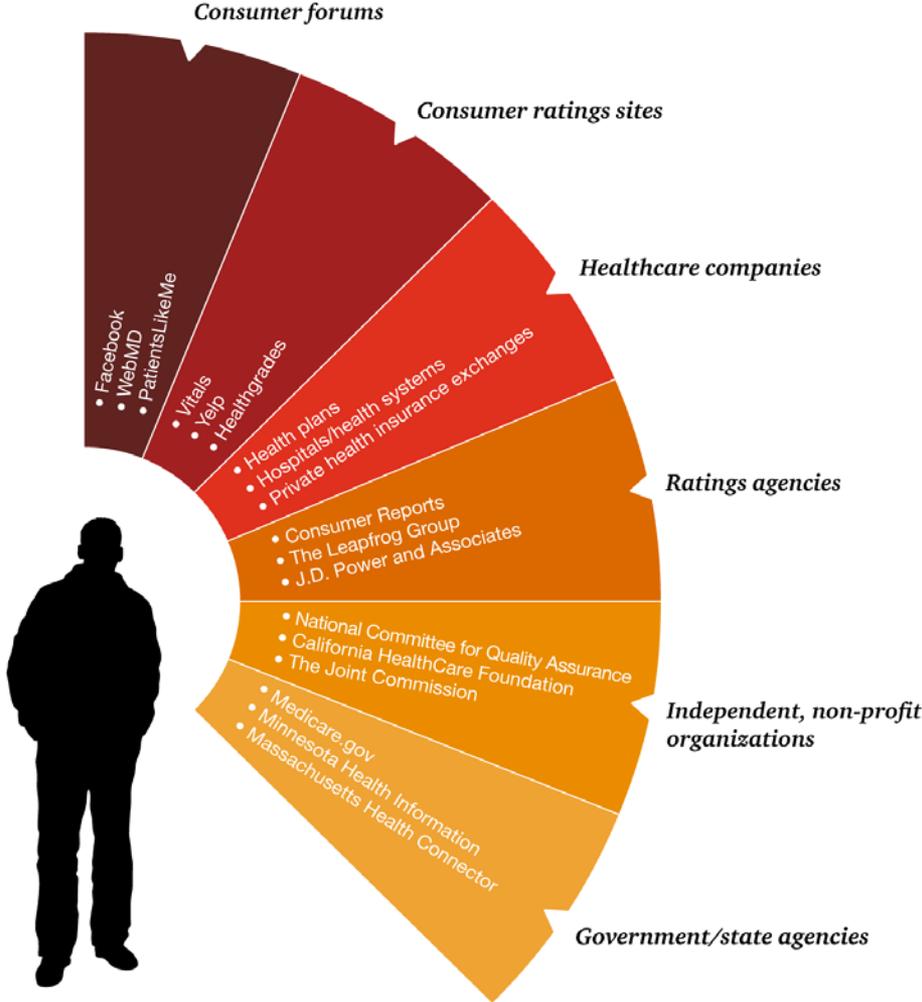
- Strongly agree/agree
- Neither agree nor disagree
- Disagree/strongly disagree

n = 1000



Source: PwC Health Research Institute Consumer Survey, 2012

Consumers face a myriad of healthcare ratings and review sources

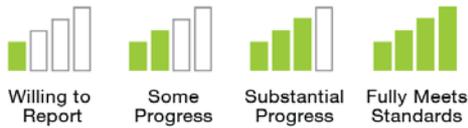


Note: Figure does not include all sources of healthcare ratings and reviews
Source: PwC Health Research Institute Analysis

The many looks of healthcare ratings

The Leapfrog Group Hospitals

Progress Towards Meeting Leapfrog Standards



Hospital Safety Score Hospitals



Healthgrades Doctors

■ = Provider Average ▲ = National Average

Poor Fair Good Very Good Excellent



Consumer Reports Health plans



Hospitals and drug stores



Medical groups



Yelp Doctors, hospitals and pharmacies



Vitals Doctors



CalHospitalCompare Hospitals

The performance rating icons indicate how well a hospital performed compared with other hospitals.



Hospitals



Permission granted by California HealthCare Foundation, Consumer Reports, Healthgrades, The Leapfrog Group, Vitals, and Yelp

Consumer Reports – Not just washing machines anymore

- The Health Ratings Center formed in 2008
- Publishes ratings on drugs, hospitals, health insurance, doctors, and diseases and preventive services
- Partnership with Robert Wood Johnson Foundation for medical group practice review in certain states (MA, WI, MN)
- Consumers are changing behaviors:

26% (MA)

Going to talk to
doctor about
ratings

55% (MN)

Share
information
with family
and friends

6%

Plan to change
hospitals after
reading
hospital safety
ratings story

Consumer Reports – Hospital ratings example

Add a hospital to compare You can compare up to five hospitals

Select a State (Required) City/County (Optional) Hospital (Required)

	<input type="button" value="REMOVE"/>				
General Hospital Information					
<input type="checkbox"/> Joint Commission accreditation	Yes	Yes	Yes		
<input type="checkbox"/> Teaching hospital	No	No	No		
Operated by	Non-profit	Non-profit	Non-profit		
Number of beds	238	148	73		
<input type="checkbox"/> Full-time registered nurses	488	455	162		
Safety Score					
<input type="checkbox"/> Safety score	0 100	0 100	0 100		
Patient Outcomes					
<input type="checkbox"/> Avoiding bloodstream infections					
<input type="checkbox"/> Avoiding surgical-site infections	State Not Reporting	State Not Reporting	State Not Reporting		
<input type="checkbox"/> Avoiding readmissions					
<input type="checkbox"/> Avoiding serious complications	Similar to average	Similar to average	Worse than average		
<input type="checkbox"/> Avoiding mortality	Not Yet Rated	Not Yet Rated	Not Yet Rated		
Patient Experience					
<input type="checkbox"/> Overall patient experience					

Consumer Reports – Health plan ratings example

Private HMO Plans to Compare You can compare up to five plans

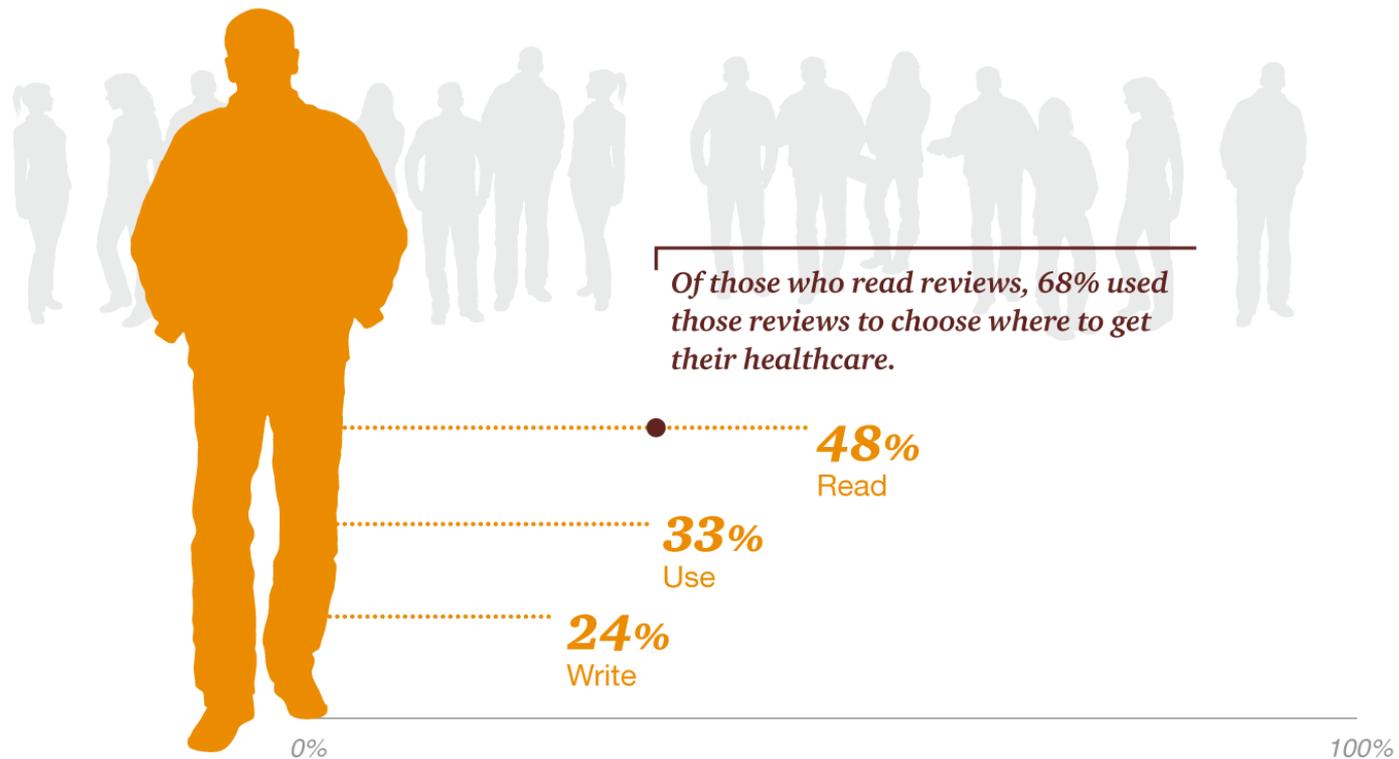
State: Wisconsin | Plan Category: Private HMO | Add an HMO or PPO Plan: Select a plan name | **Add**

To select a different state or plan category return to the [NCQA Health Insurance Search Results Page](#).

	DPH0VF X	DPH0VF X	DPH0VF X	DPH0VF X	DPH0VF X
Overall Score					
Overall Score	0 90 100	0 83 100	0 82 100		
NCQA Accreditation					
Is this plan NCQA accredited?	Yes	Yes	Yes		
Consumer satisfaction					
Consumer satisfaction	4	3	3		
Getting care	3	4	1		
Getting care easily	3	3	3		
Getting care quickly	3	3	1		
Satisfaction with physicians	3	3	3		
Doctor communication	3	3	3		
Rating of primary-care doctors	3	3	3		
Rating of specialists	3	3	3		
Rating of care	3	3	5		
Satisfaction with health plan services	5	3	Not Enough Data		
Handling claims	5	3	Not Applicable		
Rating of health plan	5	3	4		
Customer service	5	3	Not Applicable		
Prevention					
Treatment					

Consumers' use of healthcare ratings

Nearly half of consumers surveyed read reviews with 68% of them using those reviews for healthcare decision making



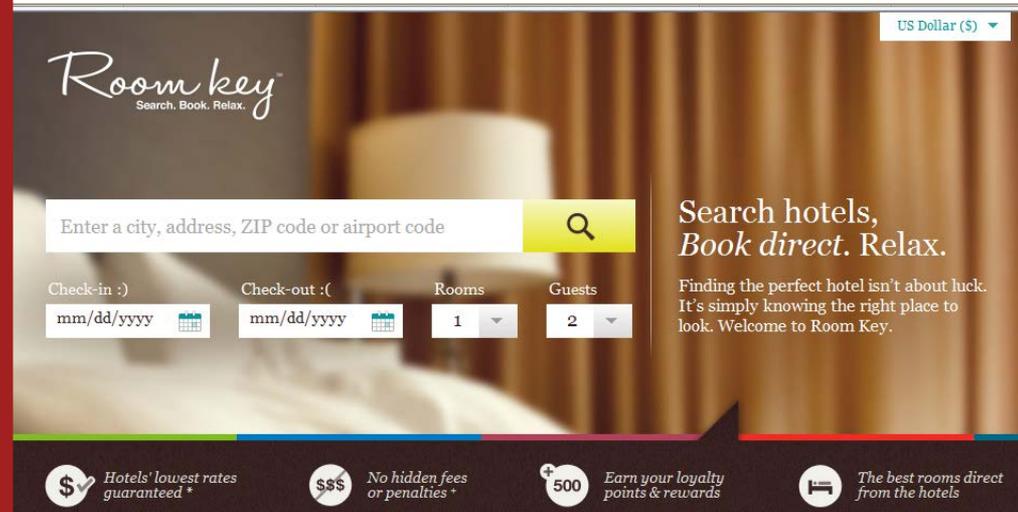
Source: PwC Health Research Institute Consumer Survey, 2012

Lessons on reviews from the travel industry

Room Key

Healthcare isn't travel, but the consumer is the same person whether searching for a hotel room or booking a flight. While healthcare decisions can be more critical than planning a vacation, there are lessons from the hotel search site Room Key that healthcare companies can learn from.

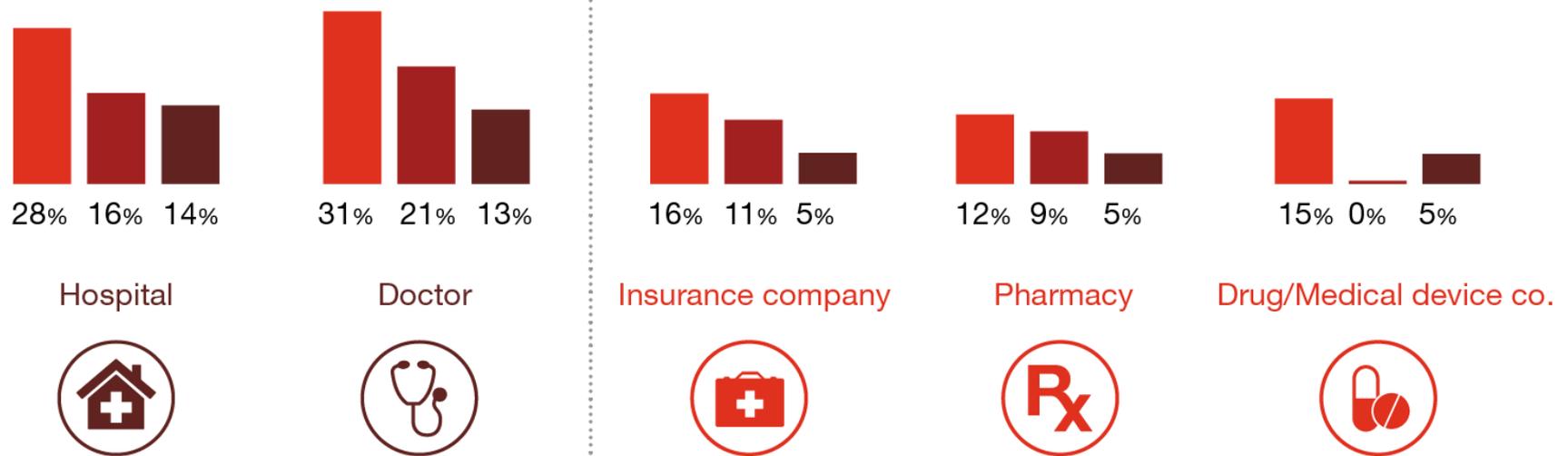
- *Credible sources drive awareness*
- *Reviews are the tie-breaker*
- *Consumers want validated reviews*
- *Timeliness of reviews is critical*



Hospital and doctor review activity surpasses other healthcare categories

- Read
- Used
- Written

n = 1000

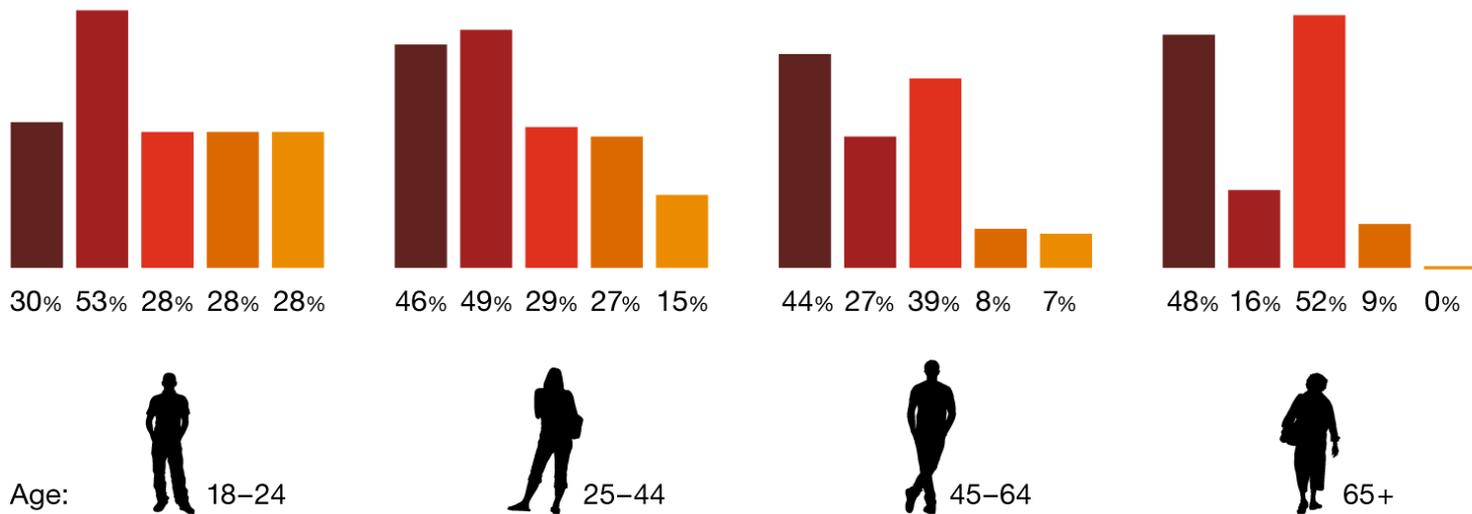


Source: PwC Health Research Institute Consumer Survey, 2012

Younger consumers prefer social media, older consumers prefer government sources for healthcare reviews

- Consumer Reports
- Blog or social media site
- Government source
- Yelp
- Angie's List

n = 483



Source: PwC Health Research Institute Consumer Survey, 2012

Industry leaders attribute the slow uptake of healthcare reviews to several factors

- Overload of information
- Personal relationships outweigh individual reviews
- Perception of 'no choice' in healthcare
- Need for trusted source of reviews

***Opening up data is the first step for
consumer engagement***

Organizations promote transparency ahead of the insurance exchanges going live

California Healthcare Foundation's *Free the Data* initiative aims to make information more broadly accessible.

The Leapfrog Group's Hospital Safety Score attempts to provide consumers with easy-to-understand hospital safety information.

Castlight Health partners with self-insured employers and health plans to provide personalized cost and quality data to help employees make informed healthcare decisions.

Turning scores into action and going beyond scores

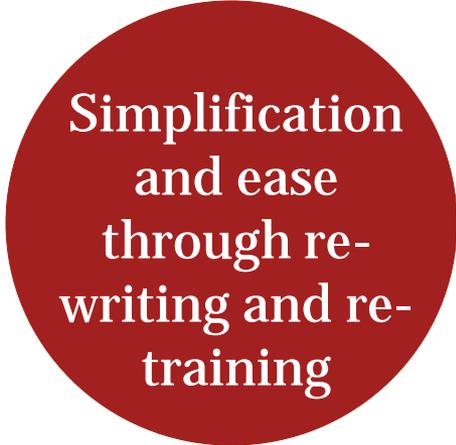
Scores alone aren't enough



Patient
advisory
committees



Observational
patient research



Simplification
and ease
through re-
writing and re-
training

What this means for your business

Strategies for tapping the power of customer ratings

- **Sort by “people like me.”** Ratings and reviews exist in many shapes and sizes, but what consumers really want is information that’s relevant to them.
- **Combine experience data.** As more accountable care arrangements develop, insurers, hospitals, and physicians can use experience data from several consumer surveys to create a more complete portrait of patients and a more coordinated care path.
- **Exchange policies on health plans may become more popular.** Medicare Advantage members can switch to a 5-star rated plan at any time if their current health plan falls below 5 stars. If the practice spreads to commercial plans, there will be one more reason for insurers to bolster customer service.
- **Navigator roles should connect care and coverage.** Individuals such as customer service representatives or brokers now help consumers obtain coverage, but the assistance often stops there. Consumers need help wading through coverage and care decisions well after signing up.

What do you think about healthcare ratings?

“Ratings won't be 100% absolute, but they give the patient a gauge of what to expect, what to look out for, and in some cases where not to go.”

What's a 5-star healthcare experience?

“One where services aren't priced to the point where you have to decide do we buy groceries or do we have insurance?”

What's a trustworthy source? *“The amount of reviews— and after you read 10 or 12, 20 or 30 of them, a pattern starts to emerge.”*

What can your health plan do better? *“Coverage. The life span on wheelchairs when you work them hard is about two years. I have to wait five years until my health plan covers the next one, which is like telling someone they can't have shoes for another five years.”*

Source: PwC Health Research Institute man-on-the-street videos

For more information

To download the full report, please visit:

www.pwc.com/us/Scoringhealthcare

To download reports in the PwC Customer Experience Radar series, please click on the following links in presentation view:

[Customer experience in healthcare: The moment of truth](#)

[Experience Radar 2012: Consumer insights for the US healthcare payer industry](#)

[Experience Radar 2012: Consumer insights for the US healthcare provider industry](#)

[Experience Radar 2012: Consumer insights for the US airline industry](#)

[Experience Radar 2012: Consumer insights for the US retail industry](#)

[Experience Radar 2012: Consumer insights for the US hospitality industry](#)

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