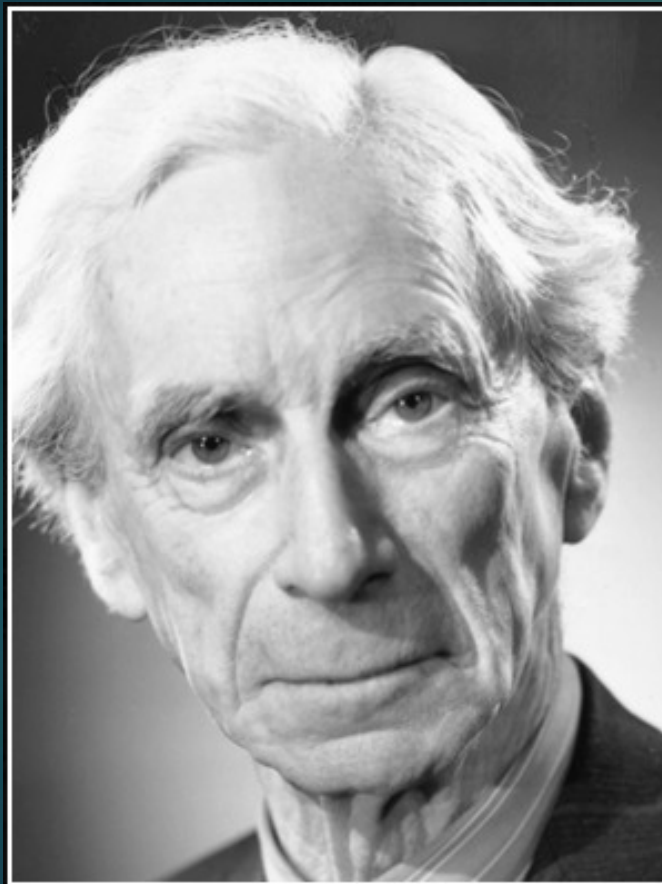




Bridging the Gap Between Ratings and Consumers

AN OVERVIEW OF THE ROADBLOCKS

Lise Rybowski
The Severyn Group
December 7, 2017

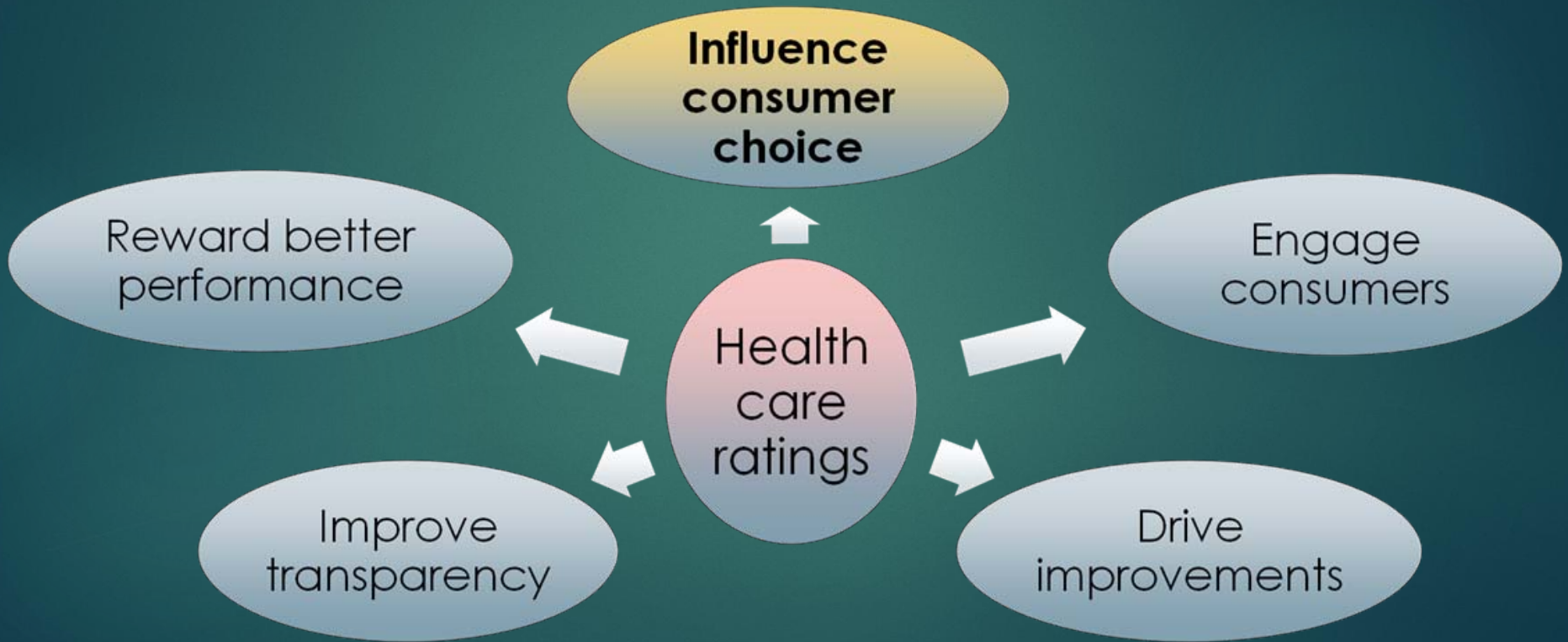


We must be skeptical even of our
skepticism.

— *Bertrand Russell* —

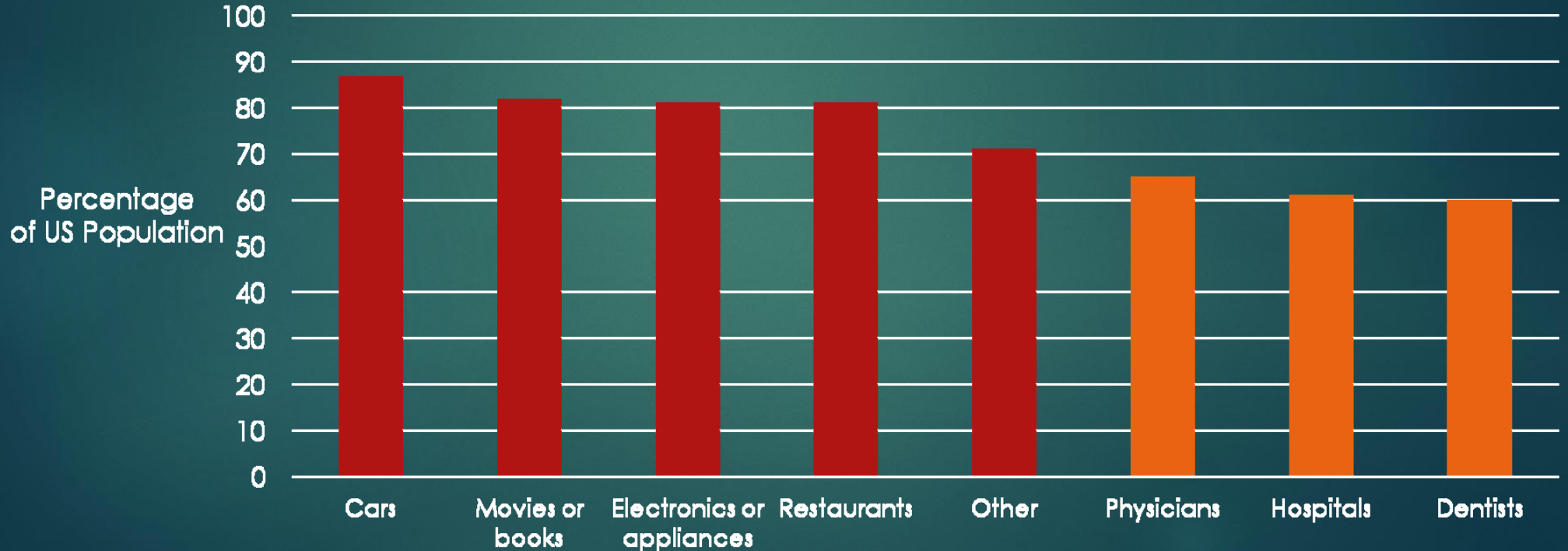
AZ QUOTES

Impact of Health Care Ratings... In Theory



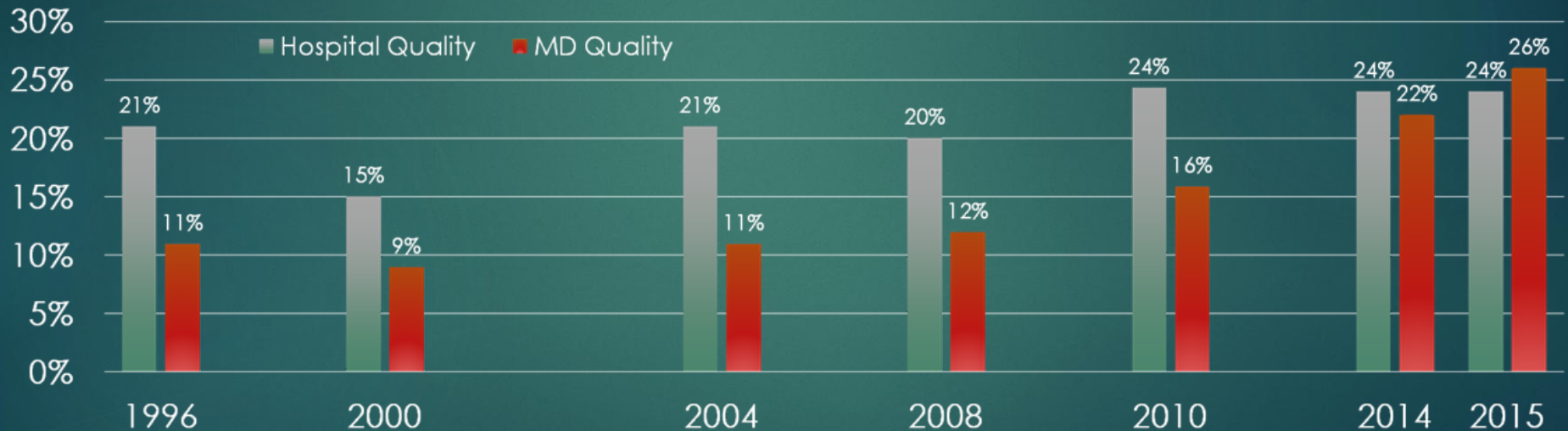
Are People Aware of Health Care Ratings and Reviews?

Awareness of Websites with Ratings and Reviews



How Many People Are Exposed to Comparative Information?

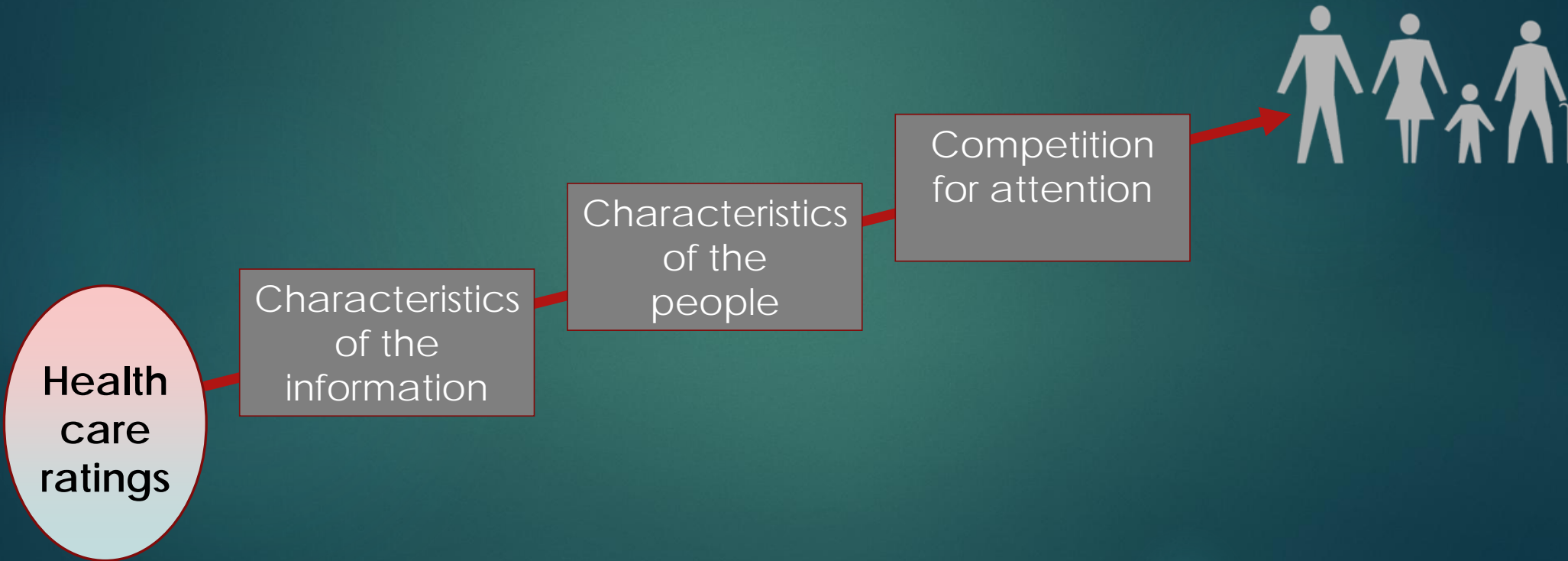
Consumer Exposure to Comparative Quality Information (1996-2015)



Source: Kaiser Health Tracking Polls 1996-2008.

Source: SelectMD survey 2010, 2014, 2015.

Reality: Multiple Roadblocks Along the Way



Are the Ratings Addressing People's Needs & Wants?

- ▶ Are the measures understandable to consumers?
- ▶ Are the measures relevant and important to consumers?
- ▶ Is the presentation of information easy to understand and interpret?
 - ▶ Words and numbers
 - ▶ Graphs, charts, and tables
 - ▶ Symbols
 - ▶ Use of roll-up measures/scores
 - ▶ Integration with other relevant information
- ▶ How hard is it to use the information to make a good choice?

Who's Likely to Pay Attention to Health Care Ratings?



- ▶ Geographic location
- ▶ Health status
- ▶ Gender
- ▶ Age
- ▶ Education
- ▶ Race/ethnicity
- ▶ Need for a provider
- ▶ Trust in information sources
- ▶ Access to information sources

Being Receptive to Ratings Isn't Enough

- ▶ Does the target audience know about the ratings?
 - ▶ What it is (features)
 - ▶ Why it matters to them (benefits)
 - ▶ How they could use it
 - ▶ Extent of dissemination efforts
- ▶ Can the target audience easily get the ratings when and where they need this information?
- ▶ What else is competing for your target audience's attention?



Where Are Consumers Looking for Information?

▶ Consumer Reports

Blogs or social media sites



State and Federal government sources

The Angie's list logo, featuring the text "Angie's list." in a white, sans-serif font. The text is centered within a solid green rectangular background.

Angie's list.

alltherapist.com
carionltd.com
citycliq.com
citysearch.com
citysquares.com
demandforce.com
dentist-ratings.net
dentistdig.com
dentistreg.com
dexknows.com
doctorbase.com
doctorhelps.com
doctoroogle.com
doctorscorecard.com
doctorsdig.com
drscore.com
easyonlinereviews.com
eggsurance.com
ehealthscores.com
enrollbusiness.com
facebook.com
fertilityauthority.com
findthebest.com
firmoo.com
fivestardoctors.com

foursquare.com
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lifescript.com
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sitejabber
smilereminder.com
spafinder
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therapistratingz.com
ucomparehealthcare.com
usatopdentists.com
vetratingz.com
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yellowpages.com
yelp.com
yourcity.md
zocdoc.com

over 70 websites
with ratings and
reviews for
providers

**I'VE BEEN
WAITING
FOR GOOD
NEWS**



What Will It Take for Ratings to Influence Consumer's Decisions?

- ▶ Offer information that consumers need and want to make an informed decision.
- ▶ Offer that information in a way that is easy for people to find, understand, and use.
- ▶ Educate people to look for this information.
- ▶ Reach people where they are (or where they're looking) when they're looking for information that could help them with their decisions.
- ▶ Partner with the people who can influence the consumers who need to make decisions.
- ▶ **Bottom line:** Market quality and cost ratings like consumer products – if that's what we want them to be.

If marketing has one goal, it's to reach consumers at the moments that most influence their decisions.

<https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/the-consumer-decision-journey>