

FACT FILE

The Quality-Driven Consumer

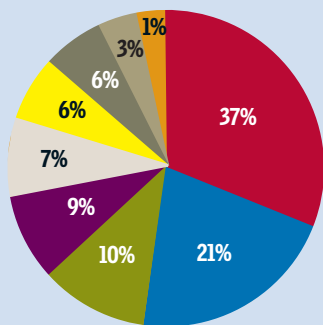
What does quality in healthcare really mean to consumers? One survey found that good physicians and treatment options constituted quality healthcare for a majority of consumers, but a multitude of other factors, from advanced technology to being treated with respect, were also cited. In any event, one thing is certain: However patients define quality, they are seeking more information about it than ever

before. The transparency movement is helping consumers to make more informed decisions and demand quality from every corner of the industry. But as consumers gather information from multiple sources and take a more active role in their care, will increased patient awareness help spark meaningful, lasting change in the industry? The answer to that question remains unknown. H

HOW CONSUMERS DEFINE QUALITY

Data from the Thomson Healthcare 2006 HealthView Plus[®] survey revealed that when consumers are asked to define high-quality healthcare, good physicians and the best treatment options are the top two factors, constituting 58 percent of responses. Interestingly, good hospitals polled significantly lower, at 7 percent. These findings suggest that the perception of what makes a good or great hospital is still open to interpretation.

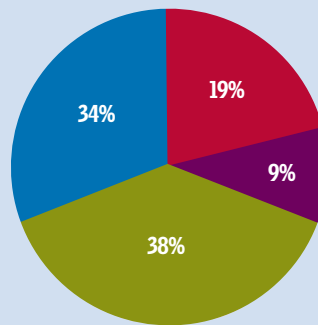
- Good physicians
- Best treatment options
- Treated with respect
- Good service
- Good hospitals
- Advanced technology
- No waiting
- Healthier patients
- Clinical trials



RESEARCH PROMPTS ACTION

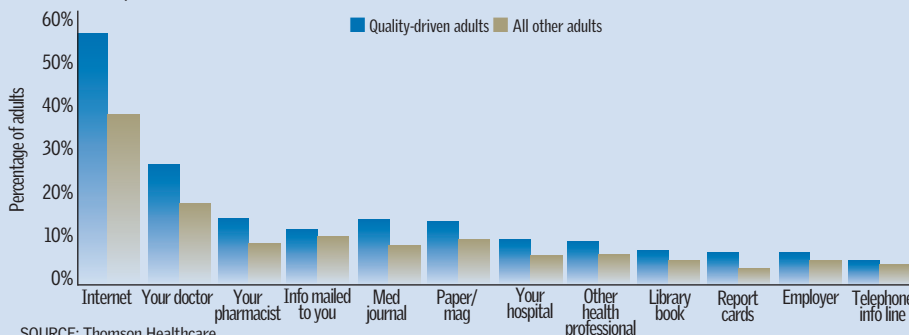
The survey also showed that one in five consumers is likely not only to research information on doctors and hospitals, but also to change loyalty if a preferred hospital receives an unfavorable rating.

- Likely to research, likely to change
- Likely to research, unlikely to change
- Unlikely to research, likely to change
- Unlikely to research, unlikely to change



WHERE DOES THE DATA COME FROM?

Quality-driven consumers are consistently more likely to seek out healthcare information, regardless of source, according to the survey. The Internet is the preferred source of information for nearly 57 percent of quality-driven consumers, while the private physician is a distant second, selected by just 26 percent of these respondents.



SOURCE: Thomson Healthcare

THE QUALITY-DRIVEN CONSUMER

DECEMBER 2007

The Generations of Quality

The attributes of healthcare quality have evolved considerably in the past three decades:

1st Generation, circa 1970s

Focus: Inspection

- Physician and institutional credentialing
- Procedure-specific credentialing
- Sentinel event monitoring
- IUM/QI & technology assessment process adequacy
- Adverse occurrence monitoring
- External accreditation

2nd Generation, circa 1980s

Focus: Statistical Quality Control

- Diagnosis-specific admissions variations
- Targeted surgical variations
- Targeted ambulatory surgery variations
- Physician statistical cost/mortality profiling
- Pharmaceutical profiling

3rd Generation, circa late 1980s to early 1990s

Focus: Outcome Measures

- Selected claims-based outcomes
- Patient satisfaction instruments
- Clinical outcomes measures
- Preventive service standard satisfaction
- Disease-specific patient perceptions
- Linkage to disability/absenteeism
- Life event risk intervention analysis

4th Generation, circa mid 1990s

Focus: Management Systems

- Large healthcare systems:
 - Integrated care management delivery systems
 - Multispecialty group practice
 - PHO, PHCO, IPA, CHIN and others
- New methods, tools and concepts
 - Data-driven information systems
 - Statistical quality control—shifting the bell curve
- Comparing across plans, hospitals, companies and individuals
 - Best practice analysis
 - Decision-support tools

5th Generation, present

Focus: Post-Managed Care

- Government agency participation—CMS, AHRQ
- Pseudo-government participation
 - NOF, IOM, PROs, QIOs
- Accreditation bureaucracies
 - Joint Commission, URAC, NCQA, AAAHC
- Integrated care management delivery systems
 - PHO, PHCO, IPA, CHIN and others
 - Health plans, HMOs, group practice
- Other players

SOURCE: PricewaterhouseCoopers, *The Quality Conundrum: Practical Approaches for Enhancing Patient Care*

Upcoming Topic:

- » Emergency Department Trends

FACT FILE PARTNER:

THOMSON

www.thomsonhealthcare.com



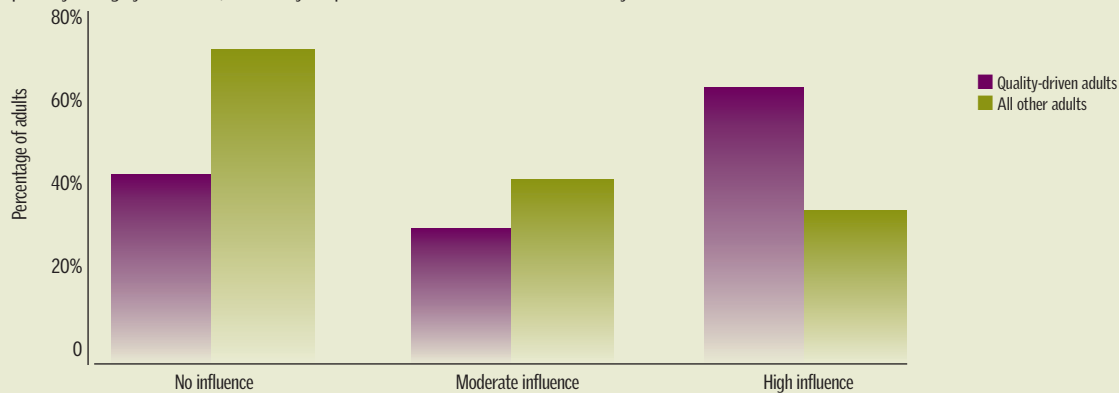
TRUSTING QUALITY

According to the Thomson Healthcare 2006 HealthView Plus® survey, quality-driven consumers are significantly more likely to trust quality organizations and quality-rating Web sites than are other consumers. The survey also found that both groups tend to trust hospitals only slightly more than they trust health plans.



THE INFLUENCE OF SPECIALIZATION

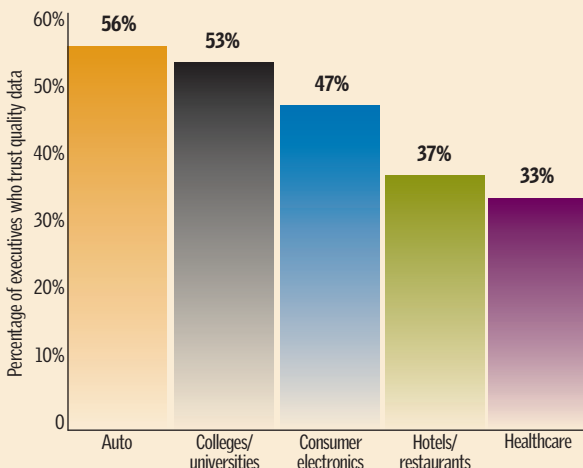
Additionally, the survey found that quality-driven consumers are more likely to select a hospital based on its specialty. But although specialization is highly influential to these consumers' choice of hospital, it is considerably less so to most other adults. Sixty-two percent of quality-driven consumers rated hospital specialty as highly influential, while only 36 percent of all other adults felt this way.



SOURCE: Thomson Healthcare

WORK TO DO

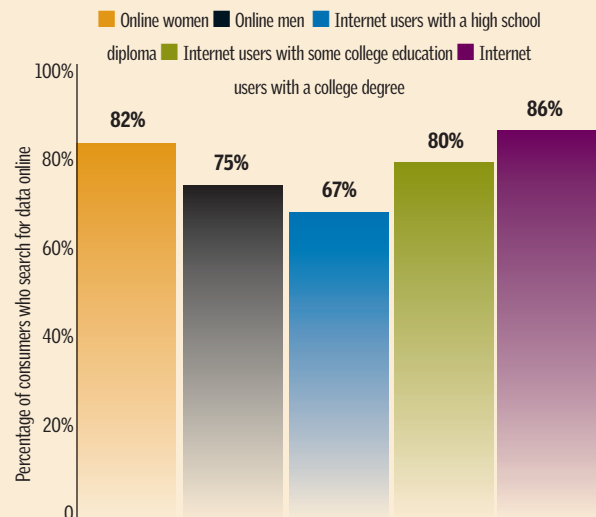
Despite the growing emphasis on making quality data available to patients, some research suggests the healthcare industry may have a long way to go before consumers and the companies that employ them are confident in the information that is available. When asked which industries have good quality data that helps consumers make reliable decisions, only 33 percent of top executives at large U.S.-based companies cited healthcare.



SOURCE: PricewaterhouseCoopers, 2006 Management Barometer Survey

ONLINE INFO

The percentage of consumers who use the Internet to search for quality data rises as the level of education increases. Eighty-six percent of Internet users with a college degree search for health data online compared to 67 percent of those with a high school diploma.



SOURCE: PricewaterhouseCoopers, Take Care of Yourself: Employers Embrace Consumerism to Control Healthcare Costs

