Experience Radar 2012

Customer insights for the US healthcare provider industry

Locating the sources of value behind truly exceptional customer experiences

April 2012

volume 4

Experience matters.

Understanding that lets healthcare providers grow their share of profitable customers—not just manage costs.

About Experience Radar

PwC's Experience Radar helps businesses search out and find the often hidden sources of value that drive truly exceptional, differentiating customer experiences.

By helping healthcare providers rank their consumer features by relative importance to the healthcare public and potential economic benefit to themselves, Experience Radar locates opportunities to create value—pointing the way toward both top-line growth and bottom-line results.

This year's study measures the experiences of about 6,000 US consumers across 11 industries.[1] The Experience Radar assigns value to a broad set of customer experience attributes broken down into industry-specific elements and then ranked by what target segments value most.

Our methodology employs an advanced conjoint survey technique to reveal insights that can be honed to extreme precision. Other, more traditional customer experience studies typically do not tie to "hard economics" like value measures, price elasticity and churn metrics. Experience Radar does.

While the results outlined in this report are at the industry level, PwC can use this same methodology to develop an Experience Radar study that is customized to your business.

1 *Retail (apparel, footware & consumer electronics), Retail Banking, Payments, Healthcare Provider, Health Payer, Airlines Leisure, Airlines Business, Hotels Leisure, Hotels Business, P&C Insurance, and Life Insurance*

We think it's safe to say that today's healthcare providers are spending more time on cost management and efficiency than they'd like.

There are so many forces trying to drive out every extra dollar of spend—and reimbursement—that one could be forgiven for occasionally forgetting that healthcare is supposed to be about patients—the consumers of that care—not just the government agencies, insurers, and employer plans paying for it.

That's what this report is all about: patients—theirs needs, wants and preferences. It focuses on measuring the attributes that make healthcare experiences not only bearable for patients, but maybe even somewhat pleasant, humane, and empowering. After all, in a marketplace increasingly driven by consumer choice, patients—more than ever before—are in "the driver's seat." And that's likely to continue.

This year's Experience Radar report can help health providers attract new profitable customers, keep the one's they've got, and grow margins. After all, running a profitable physician's office, hospital, or pharmacy isn't just about keeping costs down; its about winning and serving profitable customers (again, patients) the best you know how.

Experience Radar helps you locate two elements critical to pleasing consumers and growing business: ***experience segments*** and ***experience enhancers***.

- ***Experience segments*** are those natural groupings of healthcare purchasers that appear when respondents are categorized by the features they value, their demographics, and their behavioural profiles. They're who providers can build their healthcare businesses around.
- ***Experience enhancers*** are those market insights that—when translated into practical actions—can create value for healthcare purchasers. They're what providers might do to grow their revenue.

Experience Radar points the way to value—and profits—by identifying the ways to serve all healthcare consumers, but particularly seeking an experience that is second to none.

We unapologetically use the language of business in this report—not just the special language of the healthcare industry. After all, doctors and hospitals are in business to make money while working to improve the health outcomes of those they serve.

Best,

Paul D'Alessandro
PwC US Customer Impact Leader

Robert Valletta
PwC US Healthcare Provider Leader

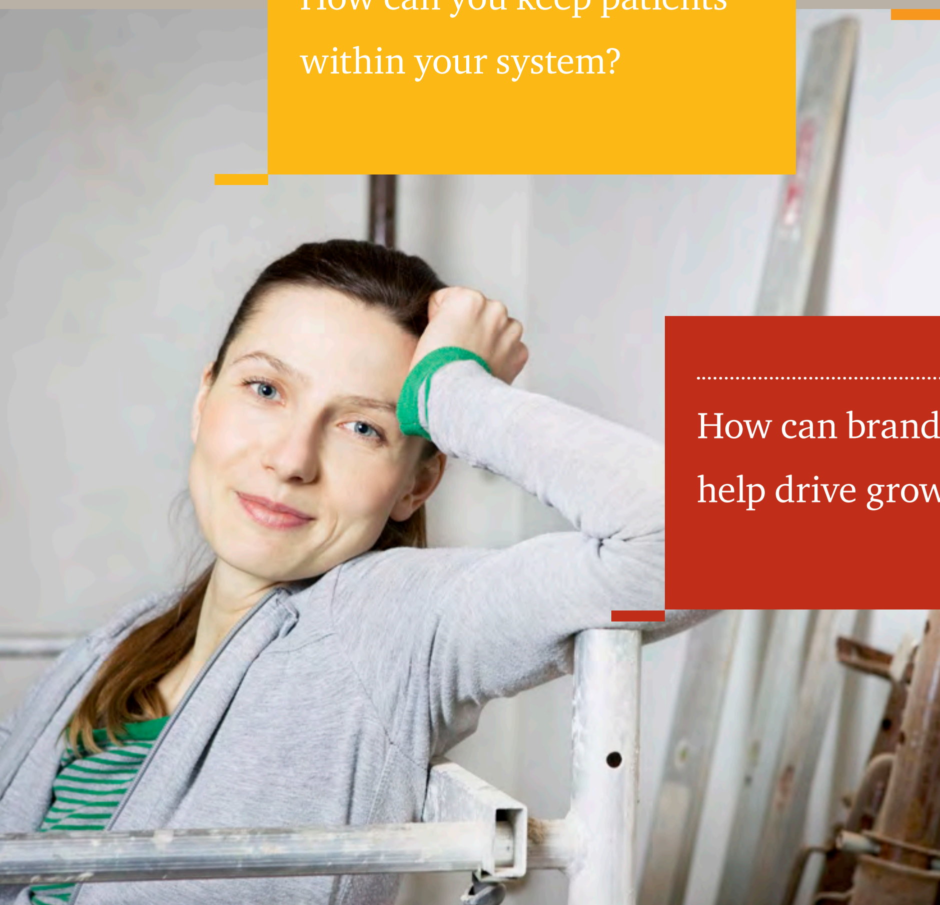
Joe Albian
PwC US Healthcare Provider Advisory Leader

Questions the 2012 Experience Radar helps you answer

Which features are your patients most willing to pay for?

What do patients expect from the care and services they receive?

How can you keep patients within your system?



How can you assist appropriate provider selection by patients?

How can brand ambassadors help drive growth?

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Customer insights for the US Healthcare Provider Industry

volume 4

Healthcare provider challenges and opportunities

The domestic economy continues to teeter at the precipice of stagnation or recovery. Realizing that even healthcare isn't immune, organizations are reaching out to connect with old rivals and new acquaintances in this time of heightened uncertainty. Some are stepping forward in cooperation; others are rewriting the rules of competition.

Providers are faced with revised Medicare payment schemes through value-based purchasing rules now in effect. Hospitals will have the chance to "earn back" the lost dollars if they achieve certain performance metrics, and a Medicare/Medicaid bundled care initiative encourages provides to coordinate and deliver the most appropriate care by paying providers an episode-based payment.

At the same time, high unemployment and higher medical costs are further delaying a typical household's medical care. The resulting fall in volume spells financial hardship for many providers.

Insurers and providers are teaming up to better understand population health and massive quantities of data. The return on investment for health information technology Is a long one, but large investments in areas like informatics may start to pay fruit.

Yet, opportunities abound for the industry. Information privacy and security is becoming an important factors for consumers in their care choices, after cost, quality, and access. Along with this come growing consumer expectations for functional electronic health records (HER). And all players are finding ways to harness the expansive power of social media within and outside their organizations.

How the Experience Radar can help

Consumer experience (or should we say "patient experience" in your sector) is quickly becoming a differentiator when measuring the value health-care providers deliver to patients and those that pay for their care.

For providers, **Experience Radar can help you:**

- Develop better products, policies and practices that matter to patients and payers
- Think through patient-centric strategies for responding to economic, regulatory, and political uncertainty
- Target new patient segments for education and service
- Set yourself apart in an increasingly heightened competitive environment through the health insurance exchanges
- Connect the dots between consumer experiences, consumer value, and sustained financial performance

2012 experience segments

Experience Radar's healthcare provider segmentation

How's it different?

Unlike traditional market segmentation which is usually based purely on demographics, Experience Segments—the market segment groups identified by Experience Radar—are defined by the types of experiences they value.

How's it done?

Respondents are pooled and divided into segments based upon the healthcare provider features they value, behavioral dimensions (like usage rate and loyalty, etc.) and some demographic data.

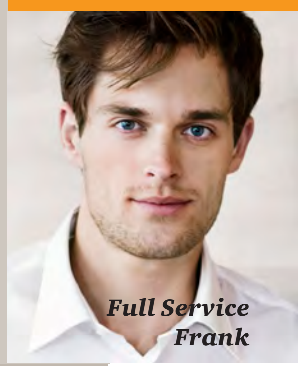
How can I use it?

The Experience Segments identified in this report help you target your experience-based offerings toward those who will value them most.

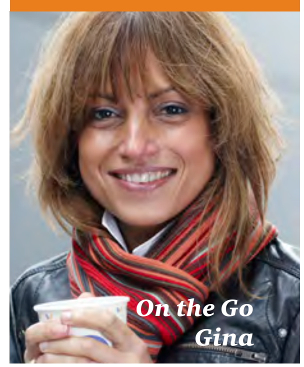
The *5* experience segments for healthcare providers

EXPERIENCE SEGMENT 1

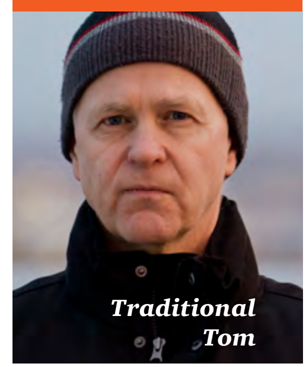
EXPERIENCE SEGMENT 2



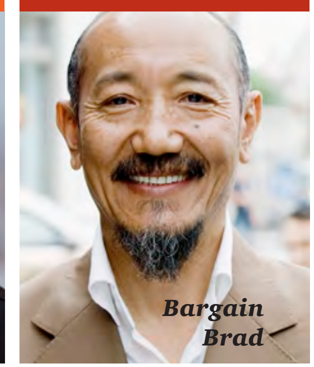
EXPERIENCE SEGMENT 3



EXPERIENCE SEGMENT 4



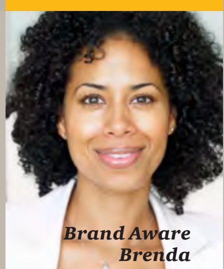
EXPERIENCE SEGMENT 5



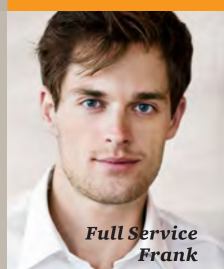
Comparing the experience segments

Details on young and urban segments

EXPERIENCE SEGMENT 1



EXPERIENCE SEGMENT 2



EXPERIENCE SEGMENT 3

EXPERIENCE SEGMENT 4

EXPERIENCE SEGMENT 5

	EXPERIENCE SEGMENT 1	EXPERIENCE SEGMENT 2	EXPERIENCE SEGMENT 3	EXPERIENCE SEGMENT 4	EXPERIENCE SEGMENT 5
	Brand Aware ***Brenda*** (N=125, 21%)	Full Service ***Frank*** (N=129, 22%)	On the Go ***Gina*** (N=113, 19%)	Traditional ***Tom*** (N=103, 18%)	Bargain ***Brad*** (N=113, 19%)
Age	Boomer (> 50)	Gen X & Y (18–49)	Gen X (33–49)	Retirees (66+)	Boomer (> 50)
Income	> $100K	$50–75K	> $100K	• $25–50K • > $150K	< $50K
Gender	Female skewed	Equal	Female skewed	Male skewed	Equal
Urbanicity	Suburb of medium city	Suburb by major city	Medium/ Metropolitan city	Small city/Town	Suburb by major city
Top Providers	• Mayo Clinic • Johns Hopkins • Others	• Mayo Clinic • Johns Hopkins • Others	• Mayo Clinic • Johns Hopkins • Others	• Mayo Clinic • Johns Hopkins • Others	• Mayo Clinic • Johns Hopkins • Others
Top Attributes	• Support • Quality	• Support • Quality	• Support • Quality	• Support • Quality	• Support • Quality
Top Features	• Accurate payment of claims • Extensive provider network	• Issue resolution • Website content	• Accurate payment of claims and fulfillment	• Extensive provider network • Accurate billing	• Accurate payment of claims • Extensive provider network
Additional	• Hassle-free issue resolution • Strong regional brand • Medical history only for new provider	• Hassle-free issue resolution • Full suite services • Strong regional brand	• Hassle free issue Resolution • Strong regional brand • Full suite services	• Strong regional brand • Hassle-free issue resolution • In-person check-in	• Hassle-free issue resolution • Full suite services • Strong regional brand

Experience Radar measures the core attributes of customer experience

The 5 core attributes of healthcare provider customer experience

ACCESSIBILTY 1

Ease of accessing and using an offering

SUPPORT 2

Ease with which a customer can obtain product or service help pre and post purchase

QUALITY 3

Accuracy, speed, breadth and value of an offering

PRESENTATION 4

Aesthetics, arrangement and description of the offering

PERSONALIZED CARE 5

Personalization of customer relationships via staff and partners

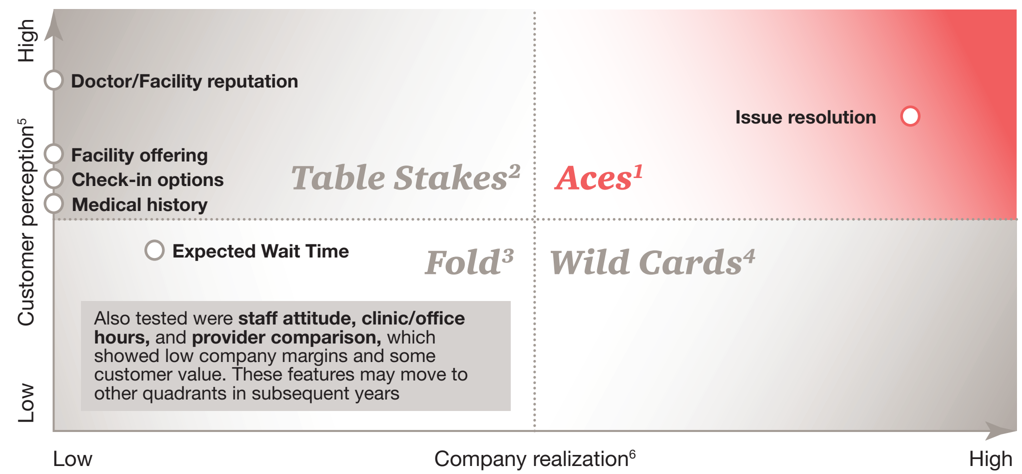
Experience Radar uncovers the impact of experiences

Healthcare provider

Experience Radar ranks healthcare provider features by relative importance to consumers as well as potential economic impact on providers. The chart on the right maps each of the features measured by their value to both groups. The features fall into four categories that—in the world of customer experience—we call ***Aces, Wild cards, Table stakes,*** and ***Fold.*** Ace features can help you hit your margin targets, while other features can drive emotional good-will and generate ancillary benefits across the organization.

Hit your margin directly with Aces, but don't ignore the impact of the rest

Healthcare provider: Health consumer vs. provider value[7]



1 Nice to have features with moderate to high economic returns
2 Must have features with low economic returns
3 Feature drives emotional goodwill & long-term gains
4 Feature generates benefits for other parts of the organization
5 Based on relative feature importance that does not consider willingness to pay measures
6 Based on willingness to pay measures that are combined with an estimated incremental feature margin contribution (High = 8–5%, Medium = 3–4% and Low = 0–2%)
7 Doctor Interaction, Patient Education, Facility Setting, and Hospital Amenities not displayed due to insignificant customer and company value

2012 experience enhancers

Building (and growing) your business by designing and delivering exceptional customer care experiences

EXPERIENCE ENHANCER **1**

Don't injure quality with a bad attitude —***invest in exceptional staff***

EXPERIENCE ENHANCER **2**

Demystify the provider selection process

EXPERIENCE ENHANCER **3**

Feed the convenience hunger by delivering anytime, anywhere patient care

EXPERIENCE ENHANCER **4**

Be at the ***fore-front of digital*** or get left behind

EXPERIENCE ENHANCER **5**

Empower patients —don't leave them in the dark

Don't injure quality with a bad attitude—invest in exceptional staff

The perception of care quality is greatly influenced by the friendliness, concern, and competency demonstrated by those delivering the care. Providers can undermine their efforts by sacrificing the quality, training and engagement of staff.

2x

Staff attitude more important in driving good experience than in the hotel or retail banking industries

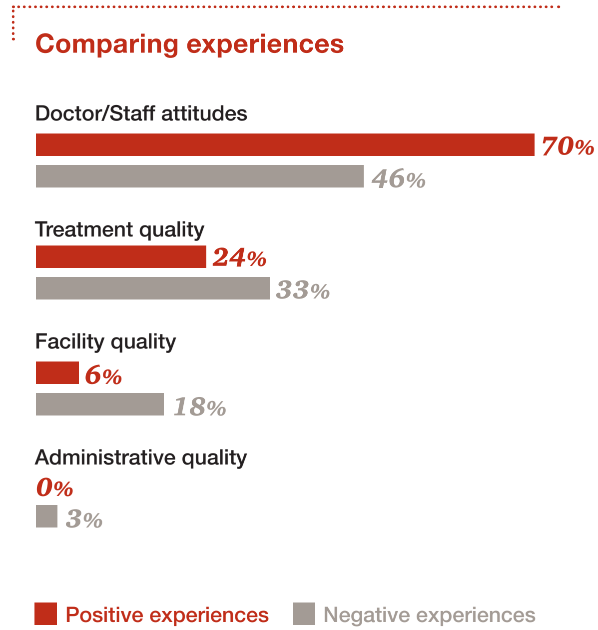
A patient visit should not feel like an assembly line.

Upon entering the clinic and well after leaving, a patient expects exceptional care. Provider and staff attitude impacts perception of care. Make sure as the treatment flows so does the empathy.

From the waiting room to the clinical room, ***provider and staff attitudes*** have the power to enhance—or undercut—the quality of clinical care.

Close to 60% of negative experiences are more likely to be remembered forever in this industry than compared to others.[1]

Six out of 10 experiences are defined by staff attitude, so ***invest in patient experience teams and culture*** to ensure quality staff and training.



1 Retail, Hotels Leisure, Hotels Business, Airlines Business, Airlines Leisure, P&C Insurance, Life Insurance, Retail Banking, Payments, Healthcare Insurance

Don't injure quality with a bad attitude—invest in exceptional staff

The perception of care quality is greatly influenced by the friendliness, concern, and competency demonstrated by those delivering the care. Providers can undermine their efforts by sacrificing the quality, training and engagement of staff.

***Up to* 34%**

More willingness to pay in health plans ***for thorough follow-up, care by providers***[2]

Perception of quality stems from good staff attitude, which is more than just bedside manner. ***Every interaction needs to make the patient feel welcome,*** from the first face they see to well after they leave.

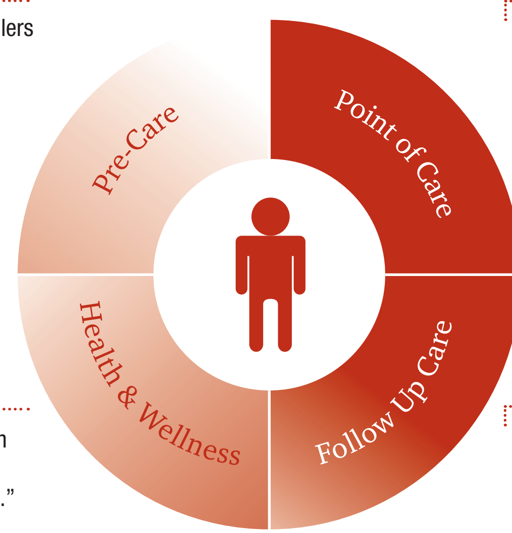
Social media is changing the way in which we relate, breaking down formalities and fostering more intimate relationships. Gen Y, as a consequence, values providers who can relate on a personal level.

1.7x Gen Y as likely than as Medicare recipients to want providers who get to know them

Invest in customer service training for all patient-facing staff. Hold "in service days" where staff can review performance, share stories, and ***innovate to improve patient experiences*** across touchpoints.

"I appreciated that the schedulers booked appointments to avoid schedule backup."

"My doctor takes her time and listens to everything I say. I feel like I am with an old friend."



"I developed a health plan with my doctor…he recommends vitamins to improve my health."

"My doctor called to see how I was doing when I came home from the hospital."

1 Medicare population: ages 65+, Gen Y ages 18–32
2 Reflects average patient's willingness to pay based on routine provider visit, highlighting that many consumers are willing to pay more for services they value in the health system

Demystify the provider selection process

Choosing a doctor or hospital can seem daunting. It doesn't have to be. Provider selection enabled by access to customer experience reviews and quality/reputation comparisons can help take the risk out of a personal decision that's laden with uncertainty.

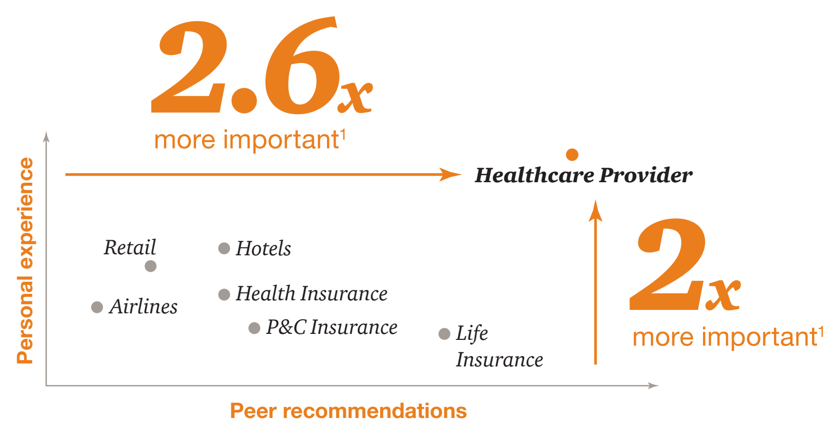
"A friend at work ***recommended*** me a doctor 18 years ago—***he's still the best I've ever had***"

Few like to gamble when it comes to health.

People trust their personal networks and rely on past experiences when choosing a provider. Encourage your patients to share their experiences—they can become your best promoters.

People depend on ***past experiences*** to confirm quality more within healthcare than any other industry.

Drivers of purchase decision



A superior experience can translate into recommendations and strong brand. Create ***reputation engines*** that allow patients to review and rate providers ***via internal review forums*** to help patients chose the best providers.

1 *Over cross-industry average*

Demystify the provider selection process

Choosing a doctor or hospital can seem daunting. It doesn't have to be. Provider selection enabled by access to customer experience reviews and quality/reputation comparisons can help take the risk out of a personal decision that's laden with uncertainty.

72%

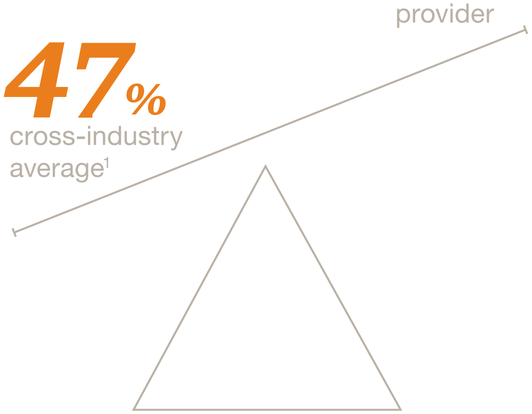
Ranked ***provider reputation and personal experience*** as the top drivers of provider choice

Patients are risk-averse and will invest in their health to avoid a bad outcome. Expectedly, consumers are ***less price sensitive*** when purchasing healthcare than when purchasing in other industries.[1]

Respondents ranking price as #1 purchase driver

8% Healthcare provider

47% cross-industry average[1]



Past experience is most important when selecting providers, and consumers pick providers by exchanging their experiences, both online and offline.

Often, your patients are not your decision-makers. Identify them using s***ocial media intelligence,*** but go beyond the 'who' to learn why and what behaviors they reveal. Invest in these decision-makers to create loyal patients.

9 out of 10

Willing to recommend provider after a good experience

1 Retail, Retail Banking, Hotels, Airlines,, Healthcare Payer, Life Insurance, & Property/Casualty Insurance, Payments

Some hidden truths surfaced in this year's Experience Radar

The **big** question: What might this mean for the future of your business?

68% Value clinic hours expanded beyond the standard 9–5

45% of patients aged 50+ are satisfied with regular 9–5 hours

9 in 10 Patients are willing to recommend provider after a good experience

Personal recommendations are 2.6x more important as a purchase driver in this industry than in others

34% Premium that a typical patient is willing to pay for above-and-beyond follow-up[1]

Only 1 in 5 patients who reported a complaint to their provider were satisfied with the level of resolution

1 In an ideal state, based on routine provider visit

Feed the convenience hunger by delivering anytime, anywhere care

Consumers are on the go, especially the young and urban. Give them the convenience they seek through innovative expansion of provider networks and enhanced self-service tools.

***Up to* 19%**

More willingness to pay in health plans ***for all-in service***[1]

Providers should enhance, not disrupt patient lives.

Quick and easy services that drive patient convenience will help providers win amongst competitors.

Convenience for many patients means ***access to a fully integrated health system.***

Take advantage of this ***win-win situation.*** When opening or moving a facility, ***consider co-locating*** with specialists or lab services. Consolidate your practice and expand your patient base through ***provider network partnerships.***

7 out of 10

Value specialist, x-ray, physician, and lab services at a single location

19%

Average patient willingness-to-pay for all-inclusive services

1 *Reflects average patient's willingness to pay based on routine provider visit, highlighting that many consumers are willing to pay more for services they value in the health system*

Feed the convenience hunger by delivering anytime, anywhere care

Consumers are on the go, especially the young and urban. Give them the convenience they seek through innovative expansion of provider networks and enhanced self-service tools.

Up to **5%**

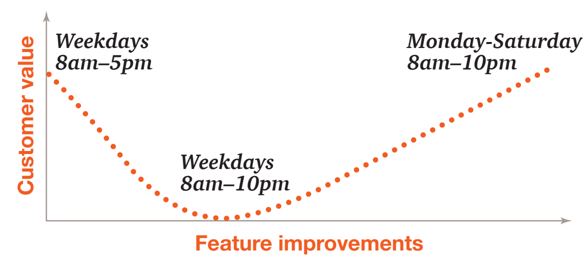
More willingness to pay in health plans for ***providers with hours beyond the standard M–F 9–5***[2]

Some patients demand more than others, and providers must adapt to win. The Medicare[1] generation schedules life around health care, younger generations want ***health care to fit their schedules.***

Plan for 24-hour care. Know your patients' schedules and preferences to manage patient flow—***train staff*** and ***allocate subcontractors*** to handle multiple responsibilities. Let the ER be for true emergencies—***redirect non-urgent patients*** to other clinics.

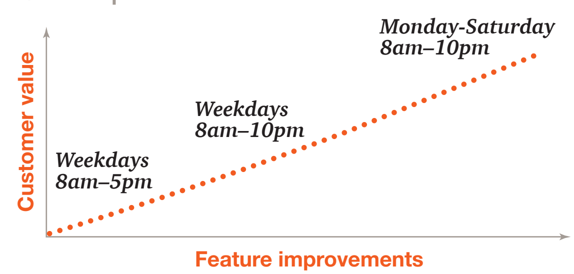
Schedule preferences by generation

Medicare[1] preference



58%
of Medicare members are satisfied with standard hours

Gen Y[1] preference



68%
of Gen Y value expanded hours[2]

1 Medicare population: ages 65+, Gen Y ages 18-32
2 Expanded hours: Monday through Saturday, 9am–10pm. Regular Hours M–F 9am–5pm or 9am–10pm; Reflects average patient's willingness to pay based on routine provider visit, highlighting that many consumers are willing to pay more for services they value in the health system

Be at the forefront of digital or get left behind

Digital native consumers outside of healthcare expect that same level of digital enablement when it comes to their healthcare purchases and decision-making. Give them consistent customer experiences regardless of channel, and empower them to keep healthy through digital wellness and preventive care.

1.7*x*

Younger patients ***are more likely than other generations*** to switch providers based on patient experience

Immediacy is expected in the digital age.

Patients expect providers to deliver the same level of digital service they receive in other industries.

4 out of 5

Airlines offer mobile boarding passes[2]

Other industries have already set customer expectations by offering convenient mobile offerings.

3 out of 4

Retailers offer mobile shopping sites[2]

Younger generations, who manage their own health and may serve as caregivers for others, are leading the foray into digital.

Gen Y[1]

22%

more likely to interact with provider online

3*x*

as likely to want online wait time information

Generate easy wins by providing onsite Wi-Fi and electronic health records that upload and transfer to the patient smoothly. ***Pilot digital appointment reminders, remote monitoring, and mobile check-in*** with young early adopters before scaling to other segments.

1 Gen Y are between the ages of 18 and 32
2 Marketwatch, Mobile Outlook, 2012

Moments of truth

Powerful events in the lives of consumers that often define their opinion of a healthcare provider

A positive ***moment of truth (MOT)*** can create a loyal patient

70%

attribute good experiences

to provider empathy

On the flip slide, create a ***negative moment of truth*** and you have a brand detractor.

33%

attribute bad experiences

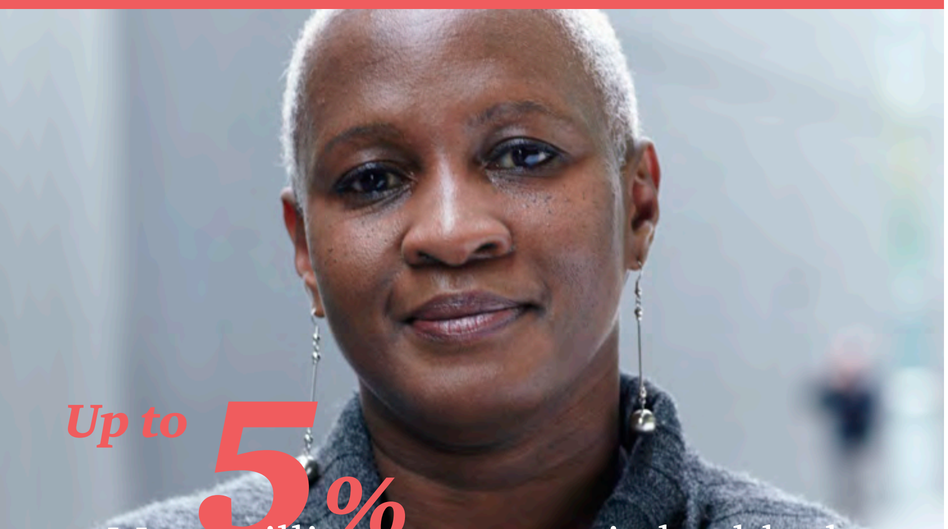
to diagnostic or treatment errors

The words used most often by those describing a positive moment of truth

The words used most often by those describing a negative moment of truth

Empower patients—don't leave them in the dark

Patients can often experience what feels like a painful lack of control. Remove some of the "pain" and uncertainty by giving them the information they need when they need it—and in the channels most valuable to them.



Up to 5%

More willingness to pay in health plans ***for wait time upon check-in*[1]**

Patients thrive on real-time information.

Uncertainty—whether wait time or follow-ups—compounds frustration. Immediate information and updates give patients peace of mind.

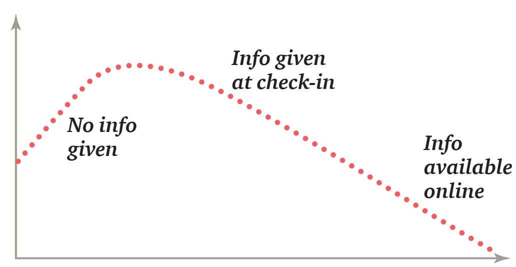
When walking into a facility, patients are ***willing to pay an additional 5%*** just to know their expected wait time.

Patients also demand information in the form of treatment education.

60%

Seek education about illness and treatment options at point-of-care

chart headline



3 out of 5

Value estimated wait time at check-in

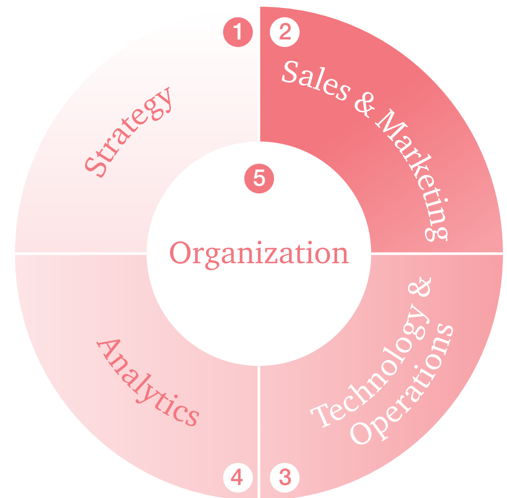
Keep patients in the loop—provide real-time information to relieve frustration, and ensure consistency across channels. Educate patients about illness and treatment options through ***digital point-of-care tools.***

1 Reflects average patient's willingness to pay based on routine provider visit, highlighting that many consumers are willing to pay more for services they value in the health system

The big picture— Growing the bottom line by keeping insurees happy

So, just how might all of this fit together? Here's one attempt at a game plan that pulls it all together.

How to address your challenges



	Issues	***Recommendations***
1	• Low customer retention • Optimize emerging channels • Manage increasing medical costs	• Revise go-to-market strategy • Simulate customer response to changes prior to investment • Develop channel strategy
2	• Ineffective customer targeting • Low customer engagement • High product mix complexity	• Create needs based segmentation • Develop customer engagement strategy
3	• Inability to customize experiences • Lack of sales force effectiveness • Increasing servicing costs	• Deploy personalization capabilities • Create digital tools to track shopper behavior
4	• Inability to uncover customer issues • Multiple and disparate views of the customer	• Develop Voice of the Customer program to uncover product, customer servicing and marketing insights • Centralize customer information into single view
5	• Disjoint customer experience • Misaligned staff behavior with experience goals	• Redesign organization to support experience goals • Develop metrics and incentives structure aligned with experience goals • Ensure goals accountability

PwC's commitment to the healthcare provider industry

Understanding the wants and needs of healthcare providers points the way toward competitive advantage.

PwC is a leading global provider of professional services to top-tier healthcare providers. We bring to our clients an in-depth understanding of today's industry issues, as well as specialized resources and international leading practices that help address the business challenges facing today's payers.

Understanding the wants and needs of healthcare consumers points the way toward competitive advantage. PwC's values-base approach to getting inside the minds of the insured—coupled with a quantitative DNA that lets us examine experiences with an economic filter—can be the difference between simply listening to consumers and truly getting to know them. Let us collaborate with you to design and deliver differentiating customer experiences that put healthcare consumers at the very center of your organization.

From strategy through execution, PwC's Advisory services help clients build their next competitive advantage. We combine the breadth of knowledge of over 33,000 global professionals with deep industry knowledge to deliver custom solutions for our clients. A long history of auditing many of the world's largest and most complex companies means we really understand the unique business challenges our clients face better than most consultancies.

PwC's Customer Impact professionals work with companies across a range of industries to help them understand how customer wants and needs point the way toward competitive advantage.

PwC's Health Industries Group (www.pwc.com/us/healthindustries) is a leading advisor to public and private organizations across the health industries, including healthcare providers, pharmaceuticals, health and life sciences, payers, employers, academic institutions and non-health organizations with significant presence in the health market. Follow PwC Health Industries at http://twitter.com/PwCHealth.

More about our methodology

This year's Experience Radar study measures the experiences of about 6,000 US consumers across 11 industries.[1] PwC conducted on-line field work from May through July 2011. The study was designed to uncover experience "recipes", pricing options and linkages to customer loyalty.

The Airline industry survey was specific to US carriers and US domestic leisure and business travelers.

We probe into the consumer responses through the lens of "experience attributes". These attributes include the:

- ease of accessing and using an offering
- the ease of obtaining service support before and after purchase
- the offerings quality and aesthetics, and
- the degree to which an offering enhances a customer's personal brand or his or her connection with others.

By using Adaptive Based Conjoint analysis, Experience Radar reveals customer trade-offs between different sets of experiential features and the value and willingness to pay consumers place on each feature. It also probes into other areas like purchase behavior, moments of truth (MOT), and word-of-mouth marketing within each industry. The study combines and assesses these data elements to create a set of experience-based insights and a segmentation schema for each industry.

Our methodology employs an advanced conjoint survey technique to reveal insights that can be honed to extreme precision. Other, more traditional customer experience studies typically do not tie to "hard economics" like value measures, price elasticity and churn metrics. Experience Radar does.

While the results outlined in this report are at the industry level, PwC can use the same methodology to develop an Experience Radar study that is customized to your business and identifies business accelerators.

1 *Retail (apparel, footware & consumer electronics). Retail Banking, Payments, Healthcare Provider, Health Insurance, Airlines Leisure, Airlines Business, Hotels Leisure, Hotels Business, P&C Insurance, and Life Insurance.*

Appendix
The different segments

Meet "Brand Aware Brenda"

EXPERIENCE SEGMENT 1

Brand Aware Brenda, skewing older and female, looks for a provider with a strong regional brand who can automate her health records. She's most likely to share good experiences with friends and bad experiences with her provider.

AGE

Boomer (> 50)

INCOME

> $100K

GENDER

Female skewed

URBANICITY

Suburb of medium city

TOP PROVIDERS

- Mayo Clinic
- Johns Hopkins
- Other

TOP ATTRIBUTES

- Support
- Quality

ETHNICITY

TOP FEATURES

- Hassle-free issue resolution
- Strong regional brand
- Medical history only for new provider

ADDITIONAL

- Most likely to share good experiences with others
- Most likely to share bad experiences with provider

Meet "Full Service Frank"

Full Service Frank, young and suburban, values full-suite services and is most likely to visit a non-emergency hospital. He's also most likely to have never had a good experience, and highly values quick service.

AGE

Gen X & Y (18–49)

INCOME

$50–75K

GENDER

Equal

URBANICITY

Suburb by major city

TOP PROVIDERS

- Mayo Clinic
- Johns Hopkins
- Other

TOP ATTRIBUTES

- Support
- Quality

ETHNICITY

TOP FEATURES

- Hassle-free issue resolution
- Full suite services
- Strong regional brand

ADDITIONAL

- Most likely to list non-emergency hospital as current provider
- Most likely to never have had a good experience
- Positive experiences stemming from quick service

Meet "On the Go Gina"

On the Go Gina, young, urban, and high-income, values a strong brand and full-suite services. She's most likely to switch to a provider who can offer her the ideal patient experience.

AGE

Gen X (33–49)

INCOME

> $100K

GENDER

Female skewed

URBANICITY

Medium/metropolitan city

TOP PROVIDERS

- Mayo Clinic
- Johns Hopkins
- Other

TOP ATTRIBUTES

- Support
- Quality

ETHNICITY

TOP FEATURES

- Hassle free issue Resolution
- Strong regional brand
- Full suite services

ADDITIONAL

- Highest proportion of experience seekers

Meet "Traditional Tom"

EXPERIENCE SEGMENT 4

Traditional Tom, the oldest segment on average, values the human touch of in-person check-ins. He's also most likely to let a bad experience influence his repurchase decision.

AGE

Retirees (66+)

INCOME

- $25–50K
- > $150K

GENDER

Male skewed

URBANICITY

Small city/town

TOP PROVIDERS

- Mayo Clinic
- Johns Hopkins
- Other

TOP ATTRIBUTES

- Support
- Quality

ETHNICITY

TOP FEATURES

- Strong regional brand
- Hassle-free issue resolution
- In-person check-in

ADDITIONAL

- Most likely to let a bad experience influence repurchase

Meet "Bargain Brad"

Bargain Brad, older and lower income, is the most price sensitive of the segments. A creature of habit, he's least likely to switch providers and most likely to have never used the internet to contact his provider.

AGE

Boomer (> 50)

INCOME

< $50K

GENDER

Equal

URBANICITY

Suburb by major city

TOP PROVIDERS

- Mayo Clinic
- Johns Hopkins
- Other

TOP ATTRIBUTES

- Support
- Quality

ETHNICITY

TOP FEATURES

- Hassle-free issue resolution
- Full suite services
- Strong regional brand

ADDITIONAL

- Most likely to have never used the internet for shopping
- Least likely to switch providers
- Highest proportion of respondents ranking Reputation #1

We hope these insights prove useful to your business

While the results outlined in this report are at the industry level, PwC can use the same methodology we've used here to develop a customized Experience Radar study and uncover opportunities to accelerate your business.

If you'd like to discuss these findings or how PwC can help you apply them to your business, contact:

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