



REPORT

A CONSUMER SURVEY COMMISSIONED BY DOCTOR.COM

Customer Experience Trends in Healthcare

2020





Table of contents

- 1.0 Introduction** page 3
- 2.0 The 2020 patient journey** page 5
- 3.0 The path to care begins online** page 7
 - 3.1 Dissecting “online search”** page 9
- 4.0 Digital preferences: The rise of mobile** page 10
- 5.0 Online reviews: A fixture in today’s patient journey** page 12
 - 5.1 The decline of the referral** page 14
- 6.0 Physician selection (and leakage)** page 15
 - 6.1 Preventing patient leakage** page 18
- 7.0 Customer experience remains the key to loyalty and advocacy** page 19
- 8.0 The millennial vs. boomer gap is shrinking** page 22
- 9.0 Key takeaways** page 24

1.0 Introduction

WILL **2020** MARK THE DEATH OF THE REFERRAL?

The digital era has ushered in a more empowered patient. Patients are utilizing all available digital tools to conduct their healthcare journeys from the comfort of their homes, much like they do in other customer

journeys: browsing the web for options, comparing providers through profile descriptions and patient reviews, and booking appointments through convenient digital apps. Patients are making healthcare decisions long before they step foot into a doctor's office. In fact, our survey reveals that **patients now rely on online sources 1.7x more than they do provider referrals** to find a doctor.

Patients now rely on online resources **nearly 2x more** than they do referrals. The use of referrals to find a provider has **declined by 44%** since 2018.

But there is a major disconnect. Despite all of these advancements, **more than half of consumers** find the patient journey to be difficult. One of the leading frustrations revealed in our survey is "finding enough information about a provider online." In fact, according to recent reports from the Centers for Medicare &

Medicaid Services, online provider directories continue to be problematic and plagued with inaccuracies despite the \$2.76B spent annually by organizations to solve this issue.¹ Healthcare organizations seeking to improve their patient engagement and acquisition programs must address the state of their online presence first and foremost.

Despite these roadblocks, patients continue to flock to digital channels to conduct their healthcare research and transactions resulting in an accompanying decline in

the usage of traditional channels — for example, a 44% drop in the usage of referrals to find a provider and a 26% decline in phone usage to make an appointment (vs. a similar panel we surveyed in 2018).

Not only are patients eschewing medical referrals, but they are also increasingly exhibiting “shopping” behaviors, with nearly **half** of all patients consulting multiple third-party sites to make a healthcare decision. Our study reveals that patients are consulting an average of **2.6** sources in their decision-making process.

Digital tools and sources have now become essential and permanent fixtures in today’s patient journey. Today’s discerning patient will ultimately select their provider based on the quality, strength, and breadth of online information; reviews; and tools available.

The findings in our “Customer Experience Trends in Healthcare 2020” report will provide a clear roadmap for organizations seeking to transform their digital initiatives, better connect patients to providers, and improve the overall care-seeking journey for patients.



Customer experience

noun kuhs-tuh-mer ik-speer-ee-uhns

Until someone enters an examination room, he or she goes through a series of actions that highly resemble any customer journey: researching and evaluating providers, comparing services and reviews, taking action to schedule an appointment, and advocating for your providers or services via 5-star reviews. A broken, frustrating, or inconvenient experience at any of these touchpoints could lead your patient right to a competitor’s practice or hospital.

2.0 THE 2020 PATIENT JOURNEY



*3rd-party websites: Healthcare directories/review sites, non-healthcare directories/review sites, and content sites

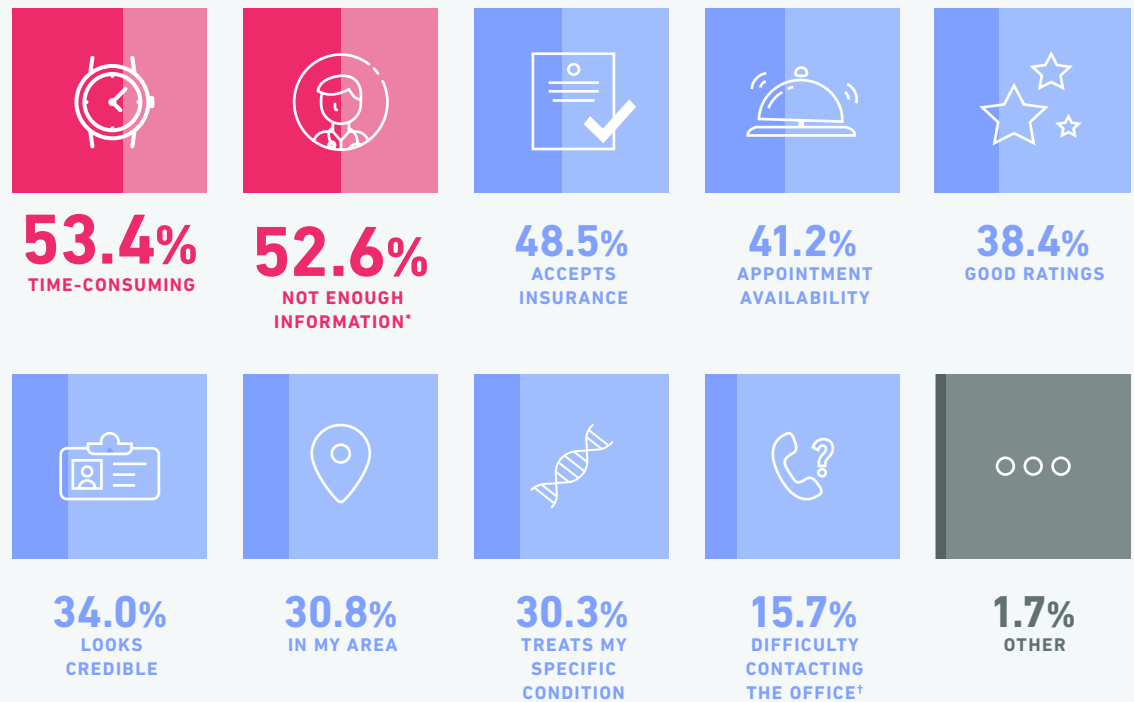
2.0 The 2020 patient journey (cont.)

88% of patients will go online to read reviews about a provider they've been referred to, and half would decide *not* to book with that provider if he or she had incomplete listings information on the web. When it comes to booking the appointment, the majority (60.2%) prefer the convenience of digital scheduling over phone calls. And the #1 reason a patient would return to the same provider is quality customer service.

But even with all of these digital resources, more than half of consumers say the patient journey is difficult (50.4%). Respondents cite being "time-consuming" (53.4%) and not seeing "enough information about a provider online" (52.6%) as the leading frustrations in finding the right provider.

Customer service remains the #1 factor that keeps patients coming back, consistent with [2018 results](#). Great communication (57.7%) and ease of appointment booking (60%) are key factors for earning a 5-star review.

Q: Please choose some of your most common challenges in finding a healthcare provider (*select all that apply*).



*about a provider online

†or lack of convenient scheduling options

3.0

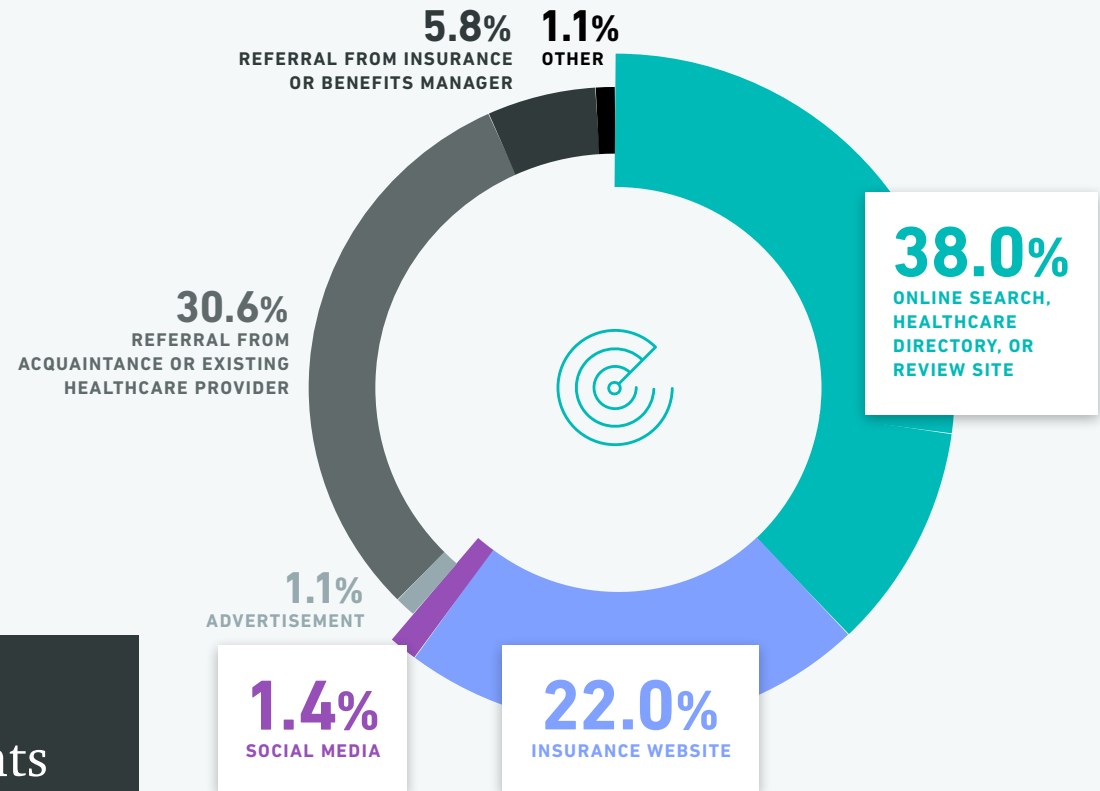
Comparison shopping: A new norm in healthcare

More consumers (61.4%) are using online resources to find a primary care provider than traditional word-of-mouth referrals (36.4%). Specifically, patients rely on online search (38%) more than they do provider referrals (30.6%).

Overall, the dependence on provider referrals has dropped by 44% from 2018, with a nearly 70% decline in the use of insurance referrals. There's been a ~30% increase in the use of online search to find primary care providers.

The majority (61%) of patients rely on digital resources.

Q: When choosing a new primary care provider, I most often rely on:



~50% of patients rely on third-party websites* to make healthcare decisions.

Patients are also increasingly relying on third-party websites – nearly half (49%) of patients have used a healthcare directory or review site (e.g., Healthgrades, Vitals), non-healthcare directory or review site (e.g., Google, Yelp), or content site (e.g., WebMD, Mayo) to search for a provider in 2019.

For most patients, search engines are the gateway or starting point of their healthcare journeys, leading them to an average of 2.6 different web destinations found in search results. Among all online resources, patients clearly prefer Google and other search engines to find a doctor (82.8%), with insurance websites coming in second place (57.6%).

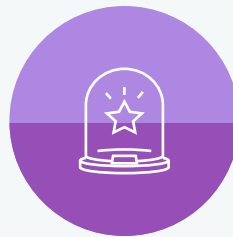
Q: Select all the resources you've used in your online search for a healthcare provider.



82.8%
SEARCH ENGINE
(Google, Bing, etc.)



57.6%
INSURANCE WEBSITE



49.0%
REVIEW OR CONTENT WEBSITE
(i.e., healthcare review site, non-healthcare review site, or content website)



41.0%
HEALTH SYSTEM OR HOSPITAL WEBSITE



KEY TIP

It's becoming increasingly critical that providers and healthcare organizations establish and maintain a healthy presence on **multiple trusted third-party review and content websites** (e.g., Healthgrades, Google, and WebMD), which are more utilized than provider or hospital domains themselves.

*Healthcare directories/review sites, non-healthcare directories/review sites, and content sites

3.1 Dissecting “online search”

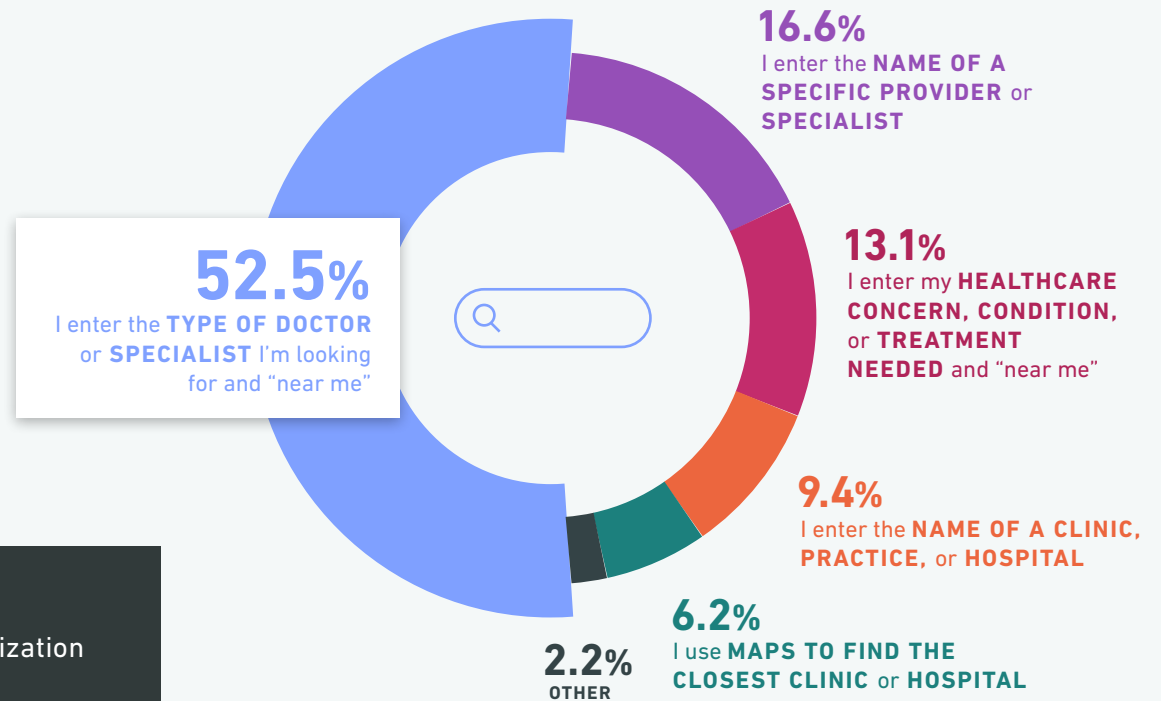
When it comes to specific search terms, patients predominantly search for an individual over a physical location. The majority (52.5%) will search for “the type of doctor or specialist I’m looking for,” and, in a distant second place, 16.6% will search for the specific provider or specialist’s name. Only 9.4% will directly look up the name of a clinic, practice, or hospital.



KEY TIP

Hospitals, group practices, and any other organization with multiple providers need to **optimize their digital presence on the individual provider level for maximum SEO**. Ensure providers’ profiles are up to date, robust, and have ample patient reviews for maximum discoverability.

Q: Which of the following best describes how you conduct your search for healthcare online?

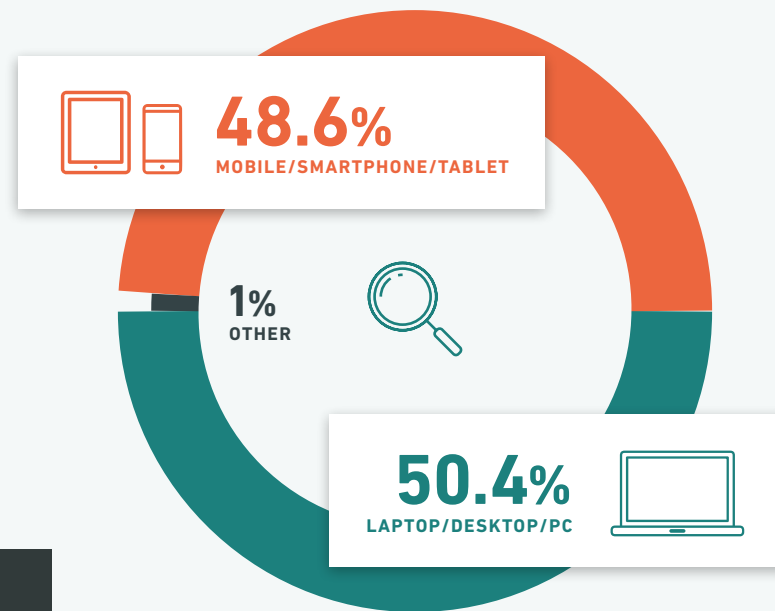


4.0 Digital preferences: The rise of mobile

The majority of patients are looking up healthcare providers online (72%). When searching, the preference for using a laptop/desktop/PC vs. mobile device (i.e., smartphone or tablet) is evenly split (50.4% and 48.6%, respectively). The preference for smartphones when searching for healthcare providers has increased by 50% in the past year.

The preference for appointment scheduling via mobile app **has jumped 92%** since 2018.

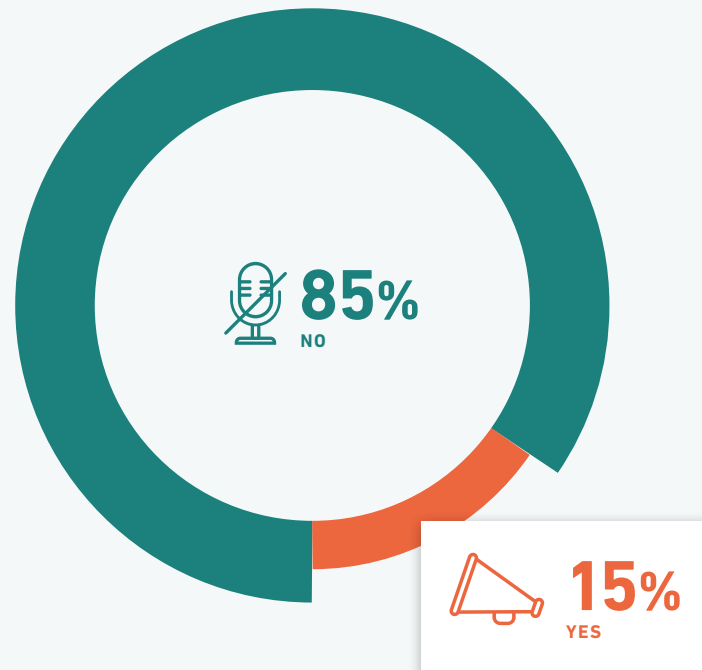
Q: When searching for a healthcare provider online, I prefer to use:



60.2% of respondents prefer digital appointment scheduling methods over analog, with 19.6% specifically preferring mobile app scheduling. This is a 92% increase from 2018.

While many are using mobile browsers and apps to search, the majority of people (85%) have *never* used “voice search” to find a provider. And only 15% of people have used an AI assistant such as Alexa or Google Home to attempt a provider search.

Q: Have you ever used “**voice search**” (e.g., Alexa, Siri, or Google) to find a provider?



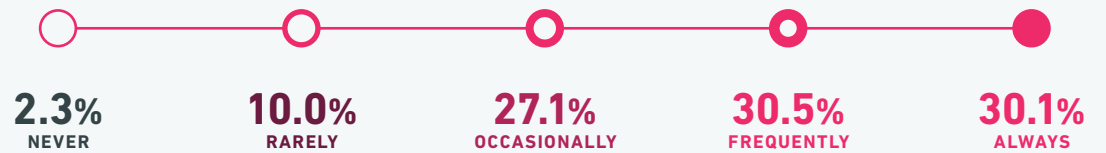
Only 15% have used an AI voice assistant (e.g., Alexa or Google Home) to search for a provider.

5.0 Online reviews: A fixture in today's patient journey

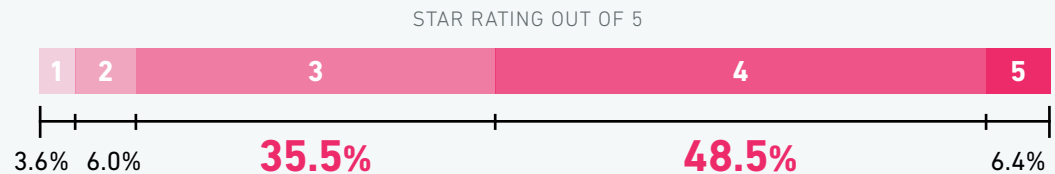
Online reviews have now become a fixture in the patient journey. Today, 87.8% of patients will go online to read reviews about a provider they've been referred to (compared to 81% in 2018). Providers can no longer stand on the strength of referrals alone. Having a strong online presence and reputation is absolutely necessary to acquire new patients and prevent referral leakage.

55% of patients want to see 4- or 5-star reviews.

Q: If you've ever been referred to a healthcare provider, do you go online to read reviews about the referred provider?



Q: What's the lowest online rating you would consider acceptable for a provider?



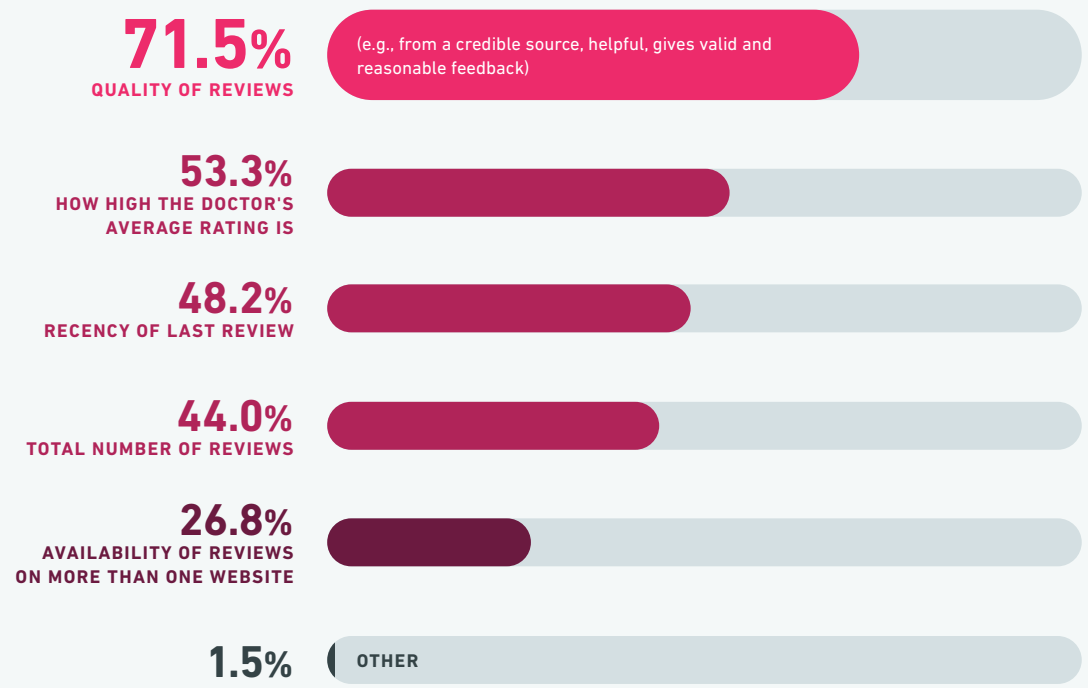
Patients deem the **quality** of reviews — over quantity, recency, or average star rating — to be the most important factor. While the credibility and helpfulness of a doctor review is most significant, the majority of patients would consider “4” to be the lowest-acceptable rating for a doctor.

When comparing multiple providers, patients consider a positive online reputation to be the most important deciding factor. 64.1% of patients have chosen one provider over another because they were rated 4 stars or higher.



The majority of patients consider **4 stars** to be the lowest-acceptable rating for a doctor.

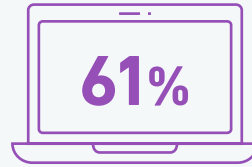
Q: Which of the following factors are important to you when reading patient reviews? *(Please choose all that apply.)*



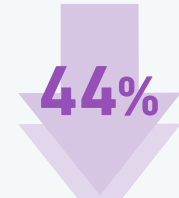
5.1 The decline of the referral

Healthcare organizations and providers are no longer immune to digital consumerism trends, especially when it comes to online reviews. A provider referral is now just one data point among many for the modern patient. Patients rely on multiple online resources and patient reviews to vet a referred provider, or they decide to conduct their provider search entirely online. In fact, the use of digital sources to find a doctor has surpassed word of mouth by nearly 200%, while the use of referrals has declined by 44% over the past year.

Referrals still matter, but organizations can no longer stand on the strength of referrals alone. Patients who rely on referrals will almost always go online to read reviews. Hospitals and providers must take their online presence seriously, not only for future patient acquisition, but to prevent further referral leakage as well.



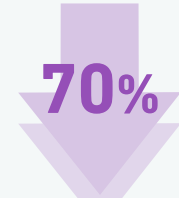
61%
of patients rely on online resources
vs. word-of-mouth referrals (30.6%)



44%
decline in usage of provider
referrals since 2018



~90%
will go online to read reviews
about a referred provider



70%
drop in usage of insurance
referrals since 2018



REFERRALS
#2
Referrals were outranked by ratings
as the most important criteria in
selecting a doctor



30%
increase in online search
usage since 2018

6.0 Physician selection (and leakage)

What factors influence a patient’s final decision to select a provider? Patients ranked “ratings and reviews of a specialist or provider” as the most important factor, followed by “doctor referrals” and “ratings and reviews of the facility.”



KEY TIP

Organizations of all sizes need to set up ratings and reviews at the individual provider level in order to win patient trust and secure an appointment booking. By neglecting provider reviews and only investing in the “brand’s” reputation, **you risk major referral leakage.**

Q: Before making a doctor's appointment, what factors matter most in your research?

- 1st RATINGS AND REVIEWS OF THE SPECIALIST OR PROVIDER YOU'RE CONSIDERING
- 2nd DOCTOR REFERRAL
- 3rd RATINGS AND REVIEWS OF THE FACILITY (i.e., the practice, clinic, or hospital)
- 4th SEARCH RANKING
- 5th QUALITY OF WEBSITE
- 6th SOCIAL MEDIA PRESENCE

When choosing between two providers, patients again say that positive online reviews are a make-or-break factor in their decision-making process. The availability of relevant and accurate information online as well as the ability to schedule or reschedule an appointment digitally were also critical to a patient's decision to pick one provider over another.

Q: The following services have impacted my decision to choose one healthcare provider over another (*choose all that apply*):

64.1%
 POSITIVE ONLINE REPUTATION
 (4 stars or more)



56.4%
 AVAILABILITY OF RELEVANT AND ACCURATE INFORMATION ONLINE
 (address, insurance, specialty, hours, etc.)



47.8%
 ABILITY TO SCHEDULE OR RESCHEDULE YOUR APPOINTMENT ONLINE



41.3%
 AVAILABILITY OF PATIENT REVIEWS ON 3RD-PARTY SITES
 (Healthgrades, Vitals, Yelp, etc.)



21.1%
 ABILITY TO PRIVATE MESSAGE A HEALTHCARE PROVIDER



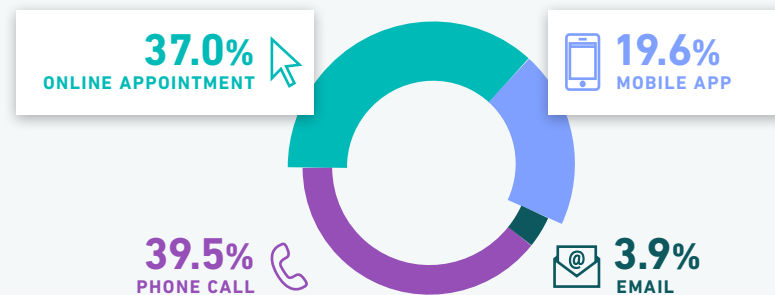
3.3%
 OTHER

56% say the availability of relevant and accurate information online is a make-or-break factor when choosing a doctor.

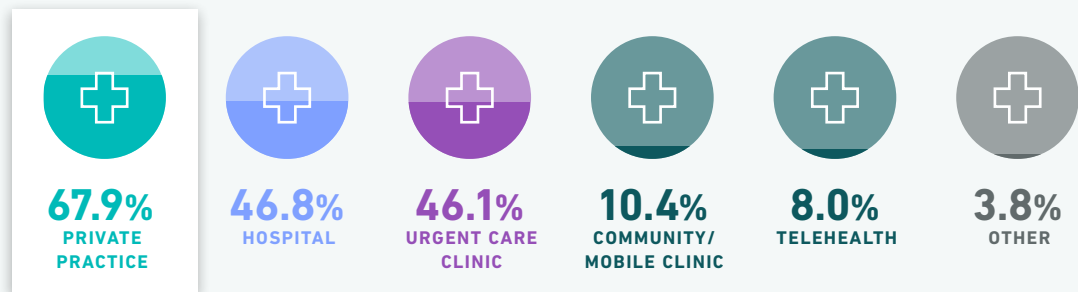
To make an appointment, 60.3% of patients prefer digital options (i.e., online scheduling, mobile apps, or email), representing a 36% increase from 2018. We see a reciprocal decline in phone call preference at 39.5%, which is down 26% from last year.

When it comes to receiving care, the majority of patients have sought services at a private practice (67.9%). However, the number of patients receiving care at a hospital as well as community or mobile clinics has significantly increased since 2018 (up 30% and 52%, respectively). Telehealth is also seeing more popularity, with a 33% increase in the past year.

Q: If all options were available, which method would you prefer to use when scheduling an appointment with a healthcare provider?



Q: In the past year, I have sought healthcare services at (*choose all that apply*):



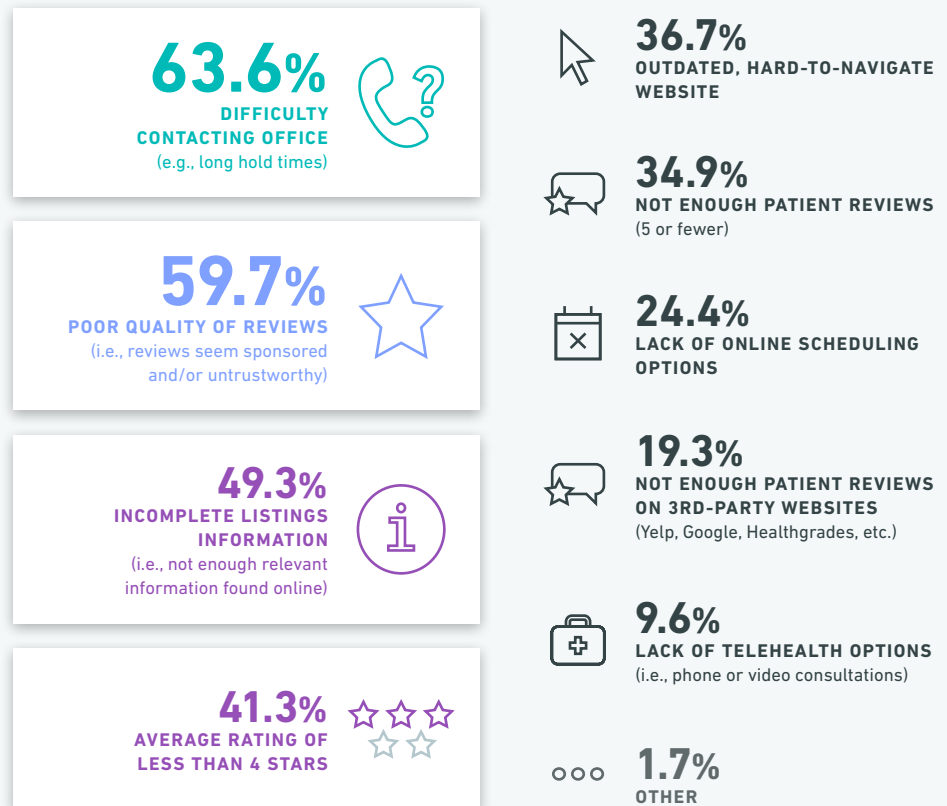
6.1 Preventing patient leakage

After finding a healthcare provider online, the #1 reason that would prevent the patient from booking an appointment is “difficulty contacting the office.” This is, perhaps, why the majority of patients prefer to use digital methods to schedule an appointment — no hold times, busy signals, or out-of-office voicemails.

The second-biggest factor discouraging a patient to see a doctor? Low-quality reviews. In fact, more patients (59.7%) care about the credibility and authenticity of a review than the star rating itself, with 41.3% citing negative reviews as a reason for not booking an appointment.

49.3% of patients also see incomplete listings information as a red flag while only 36.7% consider an “outdated website” as a roadblock, compared to 57% in 2018.

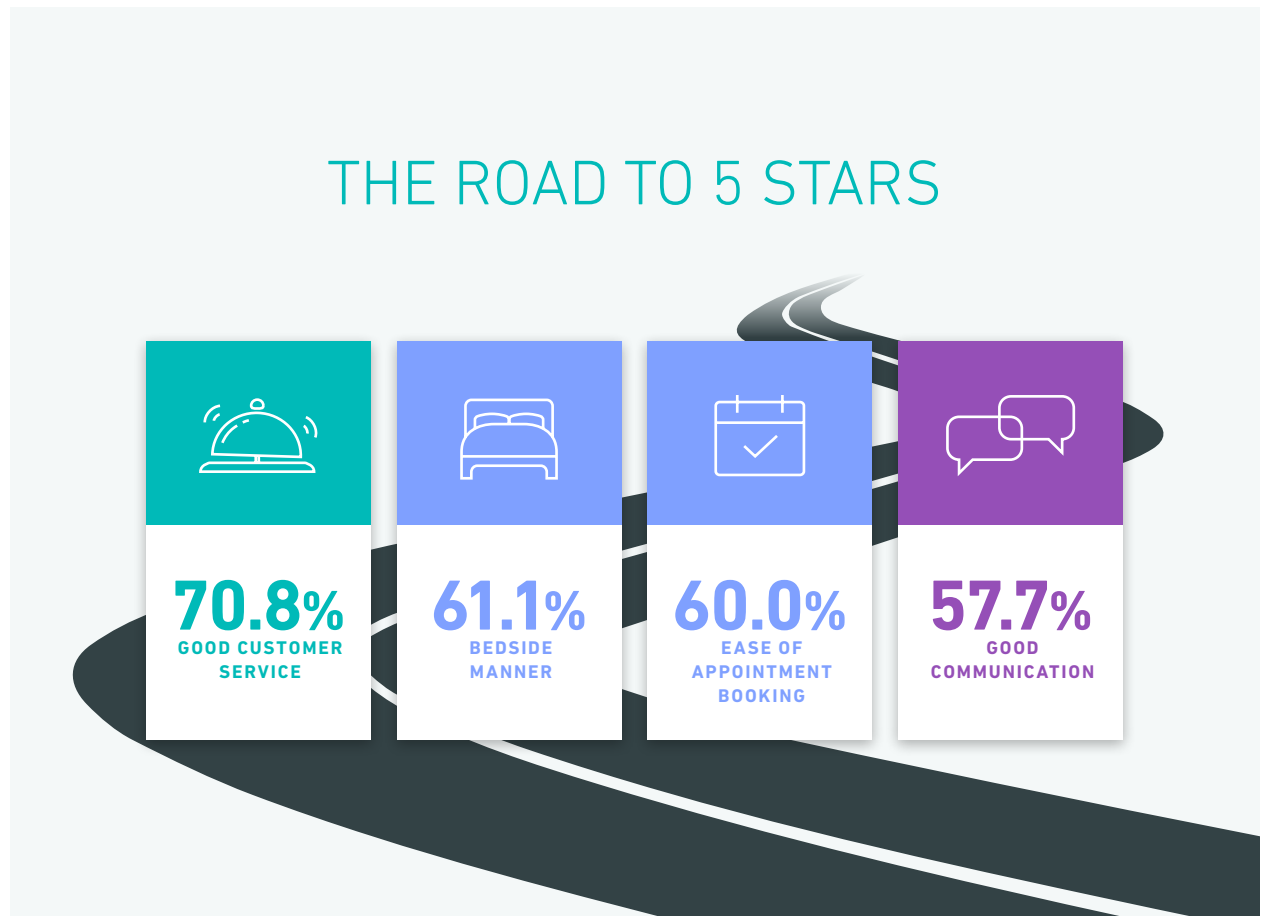
Q: After searching for a healthcare provider online, which of the following reasons would discourage you from booking an appointment with that provider? *(Choose all that apply.)*



7.0 Customer experience remains the key to loyalty and advocacy

The key to a 5-star review is no secret. The majority of patients (70.8%) consider quality customer service to be the most important factor when giving 5 stars to a provider. The same goes for patient loyalty – in order to ensure a returning patient, you need to deliver a great customer experience.

A major component in delivering a great customer experience is offering convenient and easy ways to communicate with your office, especially when it comes to making appointments. 60% of patients consider “ease of appointment booking” and 57.7% consider good communication (e.g., appointment reminders) a contributing factor to a 5-star review. When it comes to appointment reminders, patients overwhelmingly prefer text message (60.6%) over a phone call (17.8%).



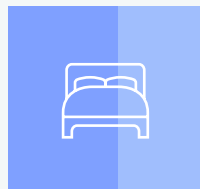
Q: Which of the following factors matter when giving a 5-star review to a healthcare provider, assuming you've received excellent care? *(Please choose all that apply.)*



Q: What factors influence your loyalty to a provider (i.e., you would seek care from them multiple times) assuming you've received excellent care? (Please choose all that apply.)



62.9%
QUALITY OF
CUSTOMER
SERVICE



56.3%
BEDSIDE MANNER
OF PROVIDER



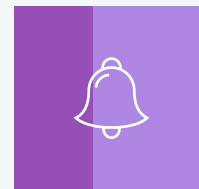
50.2%
CLEANLINESS
OF FACILITIES



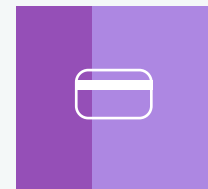
46.7%
COST



44.9%
QUALITY OF
COMMUNICATION
BEFORE AND AFTER
AN APPOINTMENT



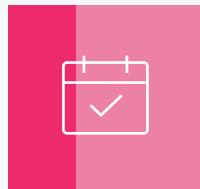
40.3%
TEXT/EMAIL
APPOINTMENT
REMINDERS



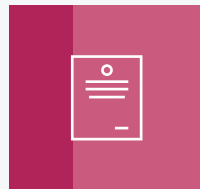
38.9%
CONVENIENT
BILLING/PAYMENT
OPTIONS



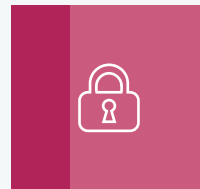
37.1%
POSITIVE PATIENT
REVIEWS



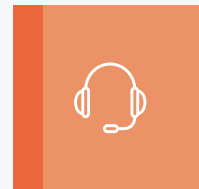
34.8%
ABILITY TO BOOK
AN APPOINTMENT
ONLINE



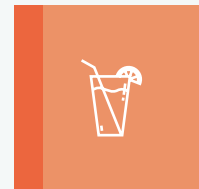
32.4%
EASE OF
PATIENT INTAKE/
REGISTRATION



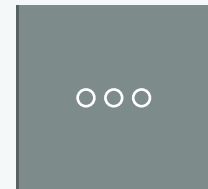
30.0%
ABILITY TO
PRIVATE MESSAGE
A HEALTHCARE
PROVIDER



15.4%
ABILITY TO HAVE
A PHONE OR VIDEO
CONSULTATION
WITH A PROVIDER



14.5%
WAITING ROOM
AMENITIES



1.5%
OTHER

8.0 The millennial vs. boomer gap is shrinking

Younger generations remain the drivers of digital behavior. However, as new technologies have become more mainstream in the healthcare space, boomer adoption is quickly following suit.

Being too time-consuming and not being able to find enough information about a provider online remain top challenges for all generations.

Q: Have you used the internet to research a healthcare provider in the past year?

BOOMERS: 62.2%



MILLENNIALS + GEN Z: 75.3%



Boomers and younger generations are **both very reliant** on search engines (e.g., Google and Bing).

BOOMERS: 84.3%

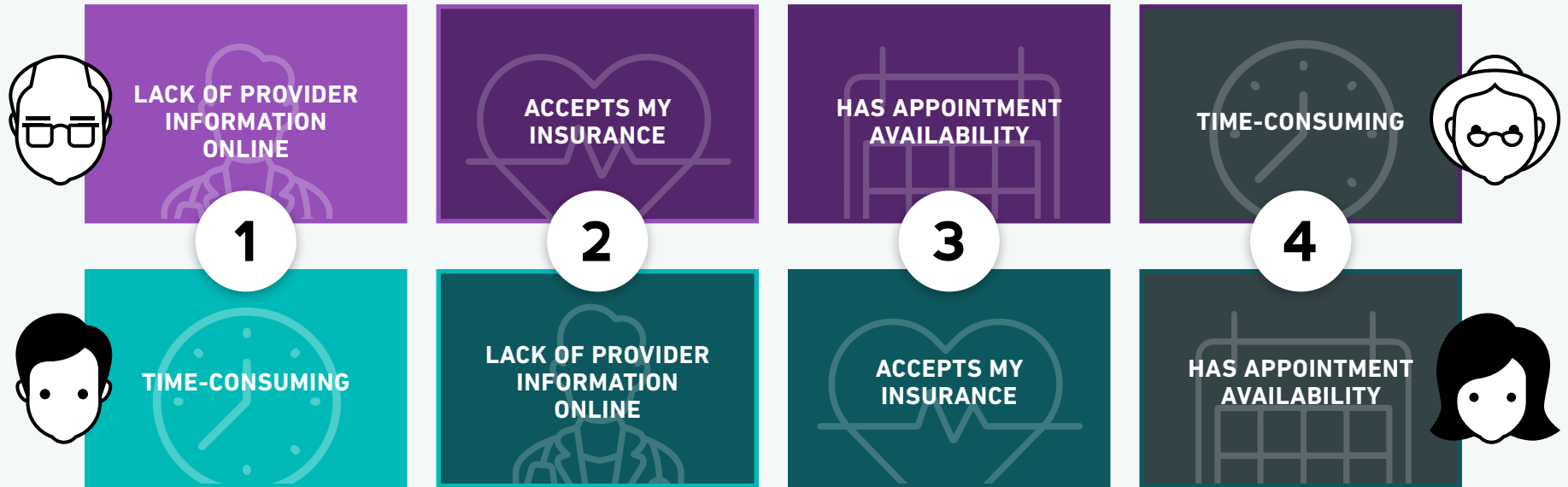


MILLENNIALS + GEN Z: 83.3%



TOP 4 CHALLENGES IN FINDING A DOCTOR

BOOMERS



MILLENNIALS + GEN Z

9.0 Key takeaways

The road to patient acquisition, satisfaction, and loyalty is paved digitally, according to this year's survey results. We've summed up the key takeaways that will guide your organization to success in 2020 and beyond.



DON'T UNDERESTIMATE THE POTENTIAL DAMAGE OF AN INCORRECT LISTING.

Listings accuracy is not only fundamental for SEO success, it's also critical in preventing patient leakage. Half of patients won't book with a provider who has incomplete listings on the web, and 53% of cite "not finding enough information about a provider online" as a leading frustration in their search for the right doctor.



INVEST IN THE CUSTOMER EXPERIENCE TO DEEPEN PATIENT SATISFACTION AND LOYALTY.

CX encompasses every touchpoint of the patient journey, from awareness to booking to follow-up communication — all of which patients prefer to do digitally. Outside of quality care, customer service is the #1 factor contributing to a 5-star review as well as ongoing patient loyalty.



OPTIMIZE YOUR LISTINGS AND REPUTATION AT THE PROVIDER LEVEL.

Organizations of all sizes need to set up ratings and reviews at the individual provider level in order to win patient trust and secure an appointment booking. By neglecting provider reviews and only investing in the 'brand's' reputation, you risk major referral leakage.



EMBRACE THE DIGITALLY SAVVY BABY BOOMER.

Boomers' preferences for online resources mirrors the trends of younger generations. For example, both generations cite "lack of provider information online" as a top challenge in finding a doctor. Update and optimize your provider listings web-wide in order to reach patients of all ages.



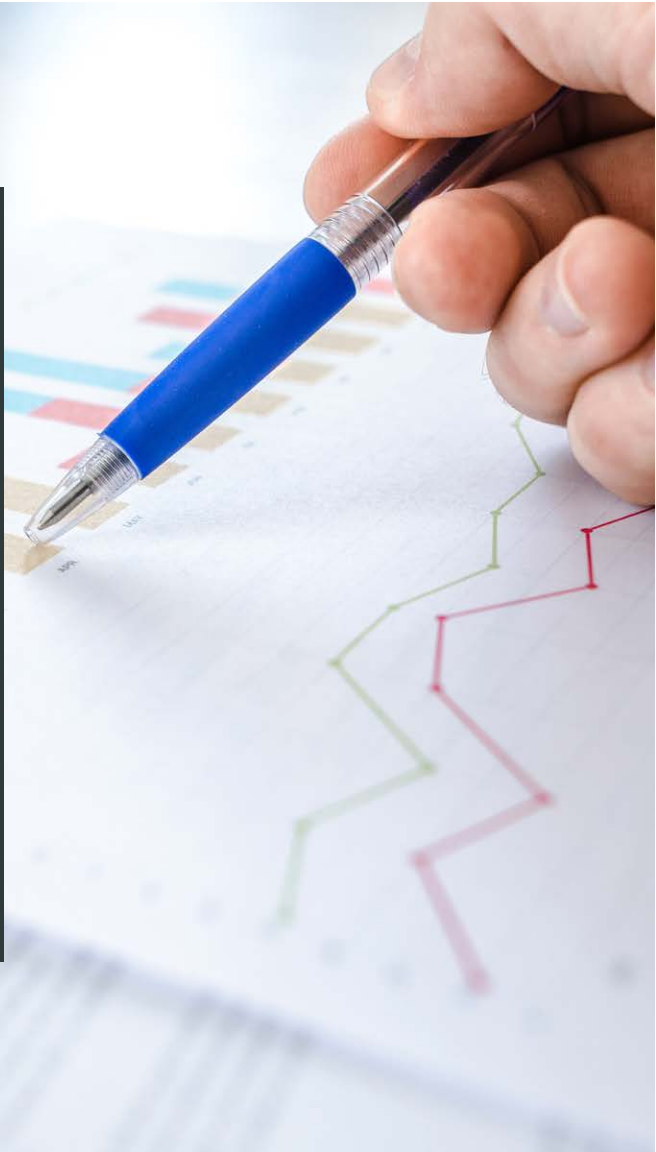
REVIEWS ARE CRITICAL AT EVERY STAGE OF THE PATIENT JOURNEY.

Online ratings and reviews are the most important resource to patients searching for a new provider. Two thirds have chosen one provider over another based on their star ratings alone, and 88% will even read the reviews of a referred provider.



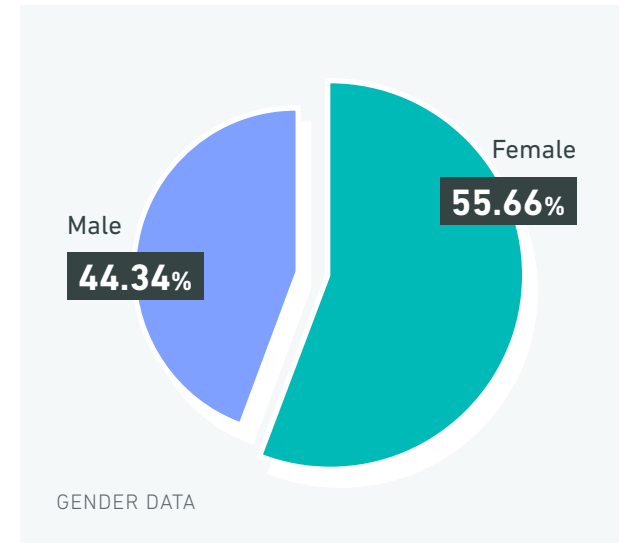
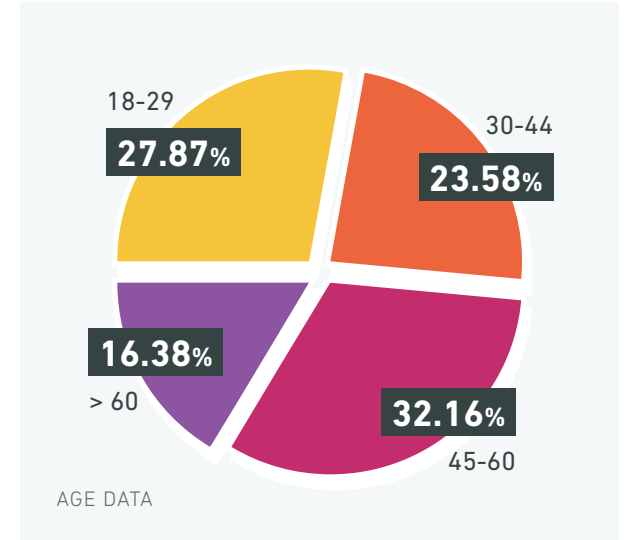
DOES YOUR CUSTOMER EXPERIENCE MEET THE MARK?

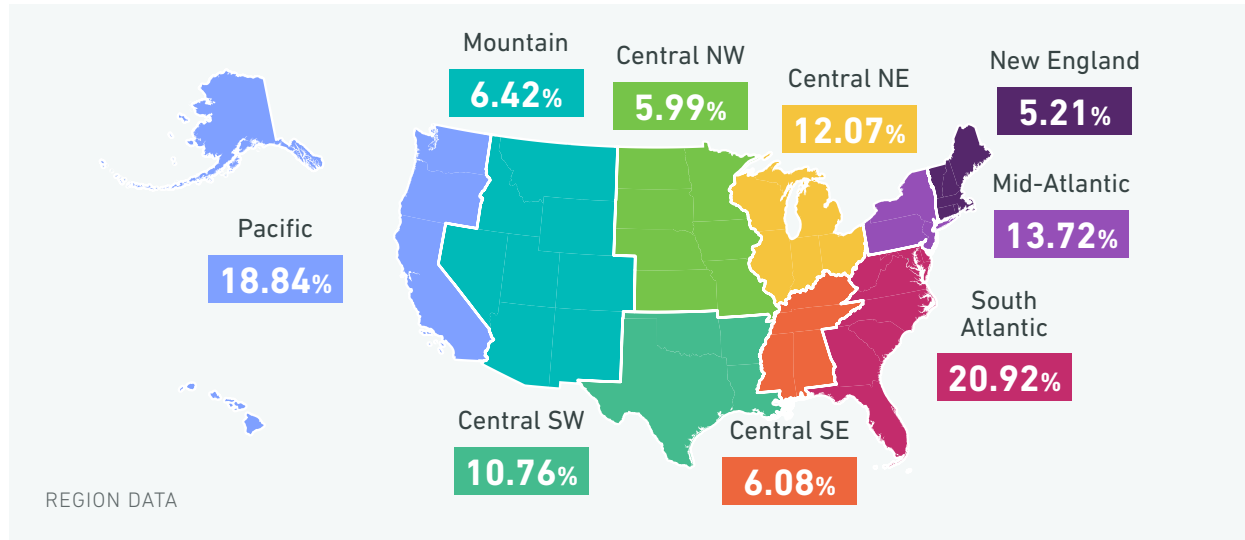
If you're part of a private practice, [scan your online presence here](#) to kick-start your journey toward becoming a CX-centric organization. For a review of your hospital or health system's digital consumer experience, please [connect with us here](#).



Survey methodology

"Customer Experience Trends in Healthcare 2020" was produced by Doctor.com. Doctor.com engaged a third-party research company in Q4 2019 to conduct the survey of over 1,600 respondents representing the U.S. adult census demographic of regions, incomes, and genders, from age 18 to 65+.

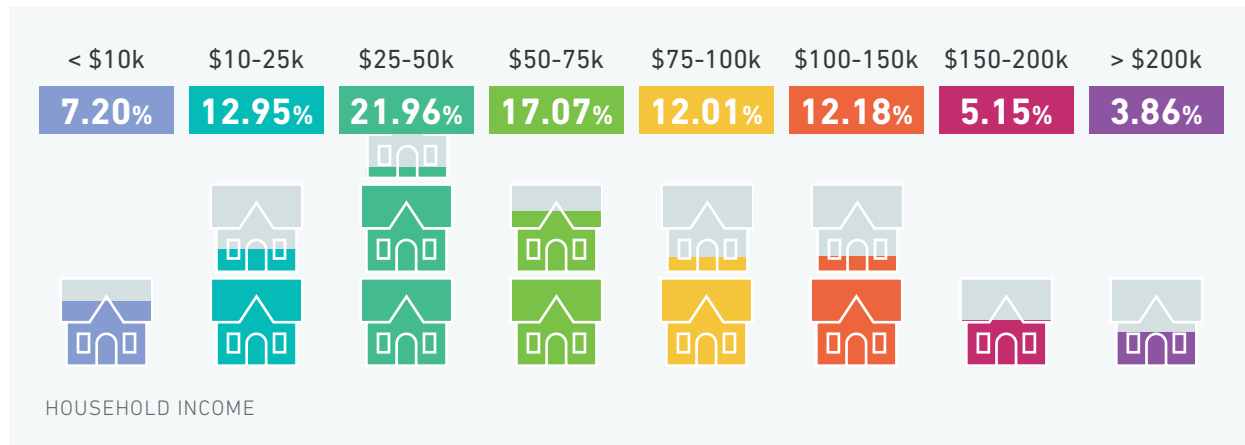





WHO WE ARE

About Doctor.com


Doctor.com empowers healthcare organizations to deliver a better customer experience at every step of the patient journey. Doctor.com's single platform offers best-in-class provider data, powers direct physician-to-patient engagement, and features integrations with the most prominent healthcare directories, search engines, social media platforms, and EHR/PM systems. As a result, thousands of clients, including leading brands in the life sciences industry, 200+ leading hospitals and health systems, and 30,000+ private practices, have been empowered by the platform to enhance their digital presence and credibility, increase patient trust, and grow their business.



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