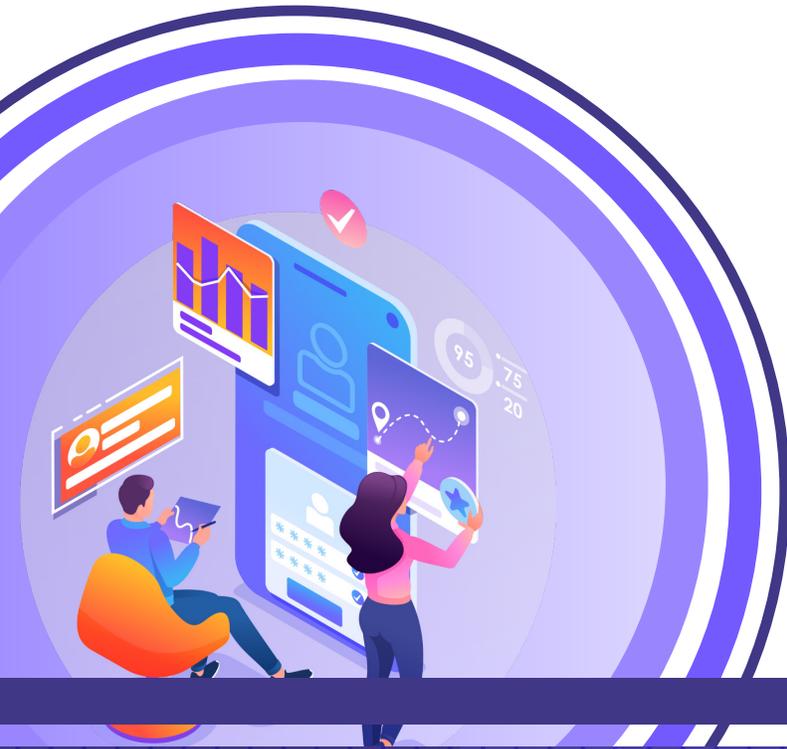


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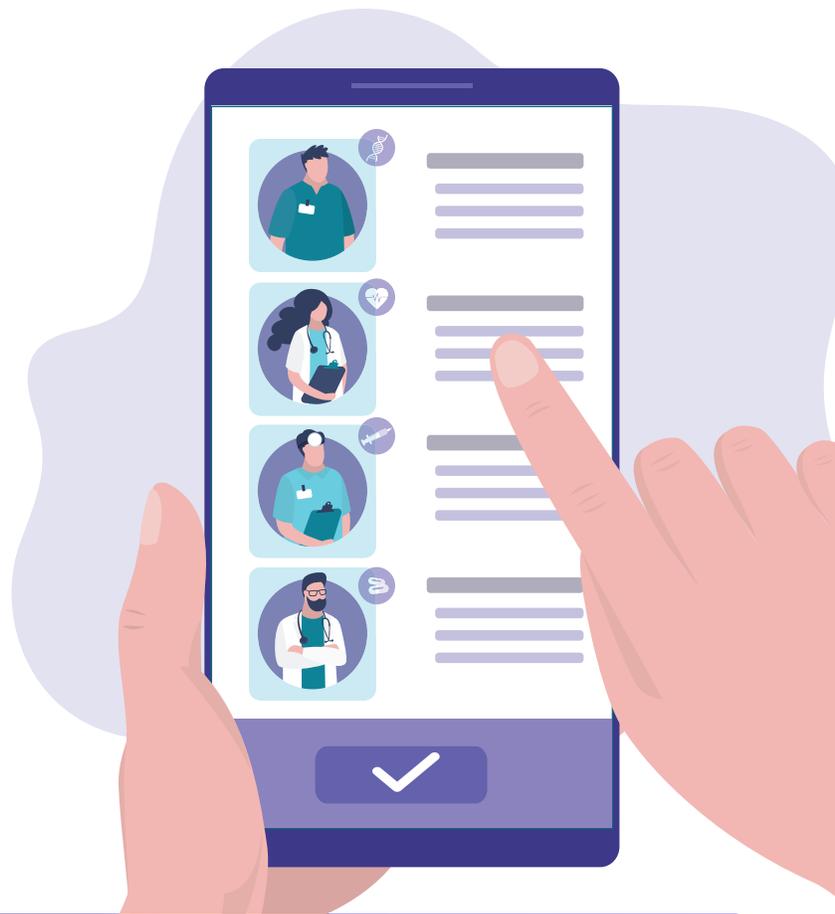
HEALTHCARE CONSUMER SURVEY

2020 Healthcare Consumer Insight & Digital Engagement Survey

Patients Look to Reviews, Ratings and Reputation
When It Comes to Choosing a Provider

Introduction

Healthcare consumers are sharing more information than ever about their experiences with providers, facilities, listings, and all aspects of the patient journey. As the digital customer experience changes at every touchpoint – from search to scheduling to surveys – healthcare professionals need to understand the needs of today’s consumers.



For the fourth consecutive year, we asked consumers these questions and more to bring you the results of our 2020 Healthcare Consumer Survey. Below, you will find the consumer trends and behaviors that shape the healthcare industry, along with analysis based on four years of data.

Specifically, this survey reveals insights into how deeply patients look to online reviews, ratings and brand reputation before choosing a provider, and, most importantly, opportunities to engage consumers and attract new patient revenue.

We hope this resource proves valuable as you seek to manage your brand’s reputation and improve the patient experience. You can reach us with any questions at marketing@binaryfountain.com.

COVID-19 Impacts the Decision-Making Process

The outbreak of COVID-19 in the U.S. sparked facility closures, service suspensions, and consumer concerns about engaging with medical care. Though some of that patient volume has started to return, consumers still are hesitant to visit medical facilities – from a dentist’s office to a wellness visit to the hospital ER.

On the bright side – and crucially – trust in local healthcare authorities, doctors, nurses, and hospitals is at historic highs. And though trust in your brand strongly influences healthcare decisions, consumers still rely heavily on other people’s opinions to decide who to visit.

According to our survey, 60% of consumers have changed their outlook on patient reviews following the COVID-19 outbreak. Nearly one-third of respondents say patient reviews are more important to them following the COVID-19 outbreak, with 13% saying they are “much more important.”

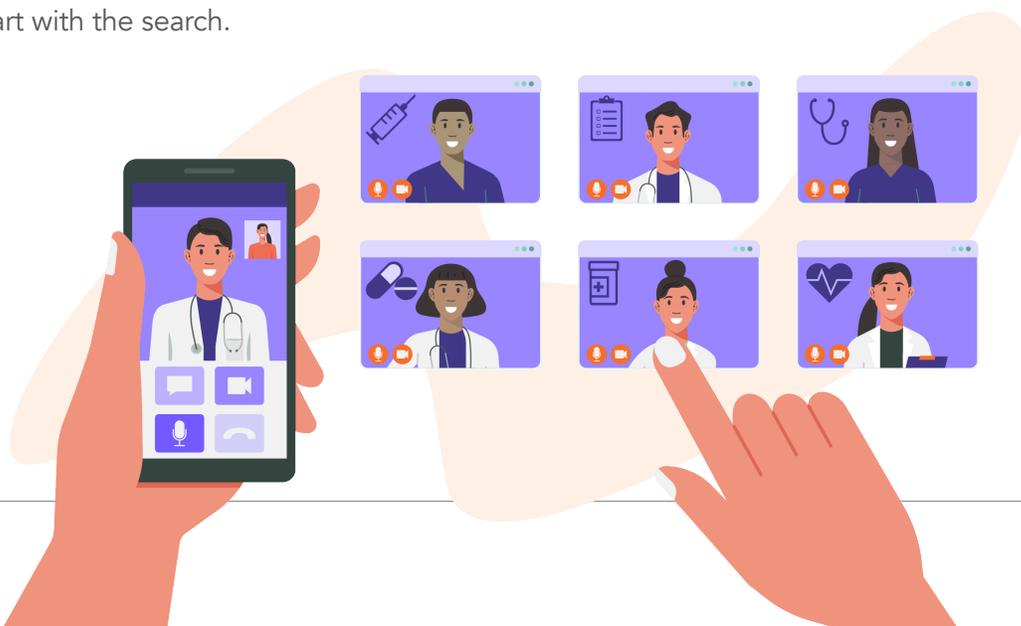
“Pre-pandemic reviews are non-persuasive,” Jay Baer said in a recent [Binary Fountain webinar](#). “Customers are more uncertain than ever. Your job is to close the uncertainty gap.”

60% of consumers have changed their outlook on patient reviews following the COVID-19 outbreak

The changing emphasis on reviews, along with the increase of trust in healthcare brands, parallel a rise in consumers sharing their experiences online, especially on review sites and social media platforms. One of the most important findings of the Healthcare Consumer Insight & Digital Engagement survey was this: **More Americans than ever before are comfortable sharing their patient experience with others.**

In the coming pages, we unpack specific survey findings that drive today’s digital patient journey – from finding doctors and evaluating reviews to booking appointments and sharing experiences online.

We will start with the search.



Finding a Doctor Online

Four years have shown nothing but growth in healthcare consumers' dependence on online ratings and reviews when finding a provider.

Patients are using ratings and review sites to find a doctor more than twice as much as they did in 2017, according to our survey. Meanwhile, consumers are using search engines to find a physician **16% more** than in 2017.

Here are the sources consumers are using to find care in 2020:



44%
Online search engine



55%
Friend/family recommendation



46%
Insurance provider website



41%
Rating and review websites



53%
Provider, hospital or physician website



28%
Social media websites



22%
Voice assistance devices

The evidence shows consumers are relying more on their own independent research to find the best quality care: Reliance on provider/family recommendations has declined 7% since 2017.

Google reigns supreme as a third-party directory for finding care, but that is just one piece of your digital front door. More than half of your patients use your website or local landing pages to find a doctor, while 46% use insurance portals and 22% use voice search.

Social media continues its growth as a physician search option, with nearly 300% more usage than three years ago. Meanwhile, more than one-fifth of consumers are using voice assistant devices to find a doctor, an increase of 500% since 2018.

300% increase in consumers' use of social media to find physicians since 2017

500% growth in those who used voice search capabilities to find physicians since 2018

So, which online platforms, exactly, are these consumers using to decide on a healthcare provider?

Your healthcare brand makes an outsized impact on consumers choosing physicians online. The hospital/clinic website is the most used platform to choose a doctor in 2020 (37%), trailed closely by Google (34%), which was the most popular last year. With listings accuracy, ratings, and search algorithms so deeply intertwined, your landing pages and local listings need to work in tandem.

Even among online platforms, social media continues to grow as a source of physician information, but healthcare-specific platforms cannot be ignored. Zocdoc, CareDash, Vitals, and U.S. News & World Report all have seen triple-digit growth since 2018.

While younger patients make up most of the growth for social platforms like Twitter and Instagram, healthcare-specific platforms like RateMDs, WebMD and U.S. News & World Report are most popular among those aged 24-55. Meanwhile, WebMD is the most-cited platform for those aged 55+, with 16% saying they have used it to find a doctor.



So, how are consumers evaluating the facilities and physicians they find in your online listings?

The importance of online reviews has nearly doubled since 2017, as people rely less on recommendations from friends and family (-25%) than they did last year. In fact, reviews were more important than personal recommendations for respondents under age 23.

The physician’s inclusion in a patient’s insurance plan was most cited as an important factor in choosing a doctor this year, having more than doubled in importance since 2019.

Interestingly, one of five consumers say CG-CAHPS scores are one of the most important factors when choosing a physician – a significant increase since 2017. Providers with favorable feedback scores should view this as an opportunity to market themselves on those results by publishing their ratings on landing pages and physician directories.

For providers and healthcare marketers, the conclusion is this: **Consumers are looking for practices like yours on more online platforms every year, and your reviews on those platforms matter more than ever.**



Using Reviews to Make Care Decisions

Consumers read an average of 9 reviews before choosing a physician, according to our survey. What are they looking for in those reviews?

Nothing beats a smile. A friendly and caring attitude was the most frequently cited important factor for consumers when evaluating a physician, followed by the thoroughness of the examination, the ability to answer questions, and clear instructions.

Friendly and caring attitude	40%
Thoroughness of the examination	35%
Ability to answer all your questions	34%
Including you in decisions about your care or treatment	32%
Clear & direct instructions on taking care of your health condition	32%
Previous success in treating the illness	23%
Amount of time spent with you	28%
Timely return of lab or test results	17%
Reputation of a provider in the community	20%
Not applicable / No particular factor	6%

Consumers read an average of 9 reviews before choosing a physician

*Respondents were asked to select all that apply



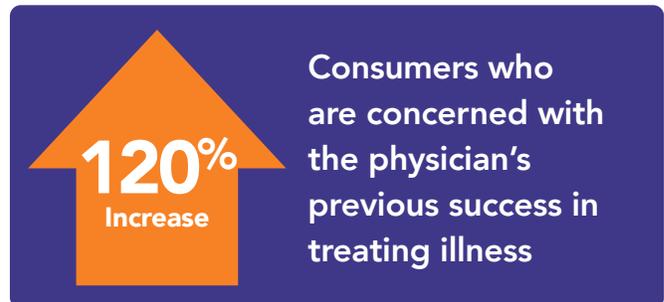
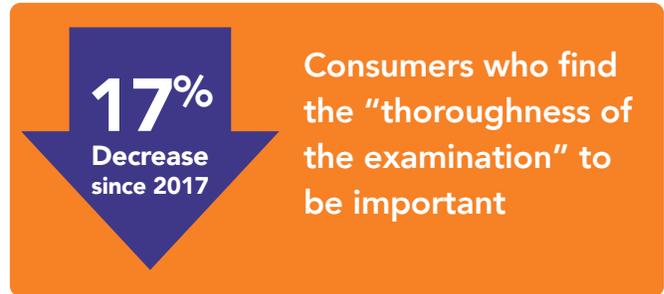
Worth noting is that the pre-visit is becoming much more significant as a customer experience touchpoint. Previous success treating the illness matters twice as much as it did in 2017, and the reputation of a provider in the community matters 360% more than it did three years ago.

Additionally, different patient experience factors weigh differently depending on age group. Just 17% of those aged 18-23 say the ability to answer questions matters most, but that percentage increases in every older age group, with 44% of those aged 56+ listing it as a top factor. The reputation of a provider in the community was listed as a top factor for 35% of those aged 18-23 and 25% for ages 24-39, but only 6% of respondents aged 55+ considered it as such.

We also asked respondents how reliable they feel online reviews and ratings are.

Our findings indicate **that trust is on the rise**: Only 13% of consumers say they are not reliable – a decrease since last year. Interestingly, significantly more males than females find patient reviews “very reliable,” according to survey demographics.

What follows is this: The onus is now on healthcare organizations to generate frequent, authentic reviews, and to make sure the patient experience improves where it matters most to your unique providers.

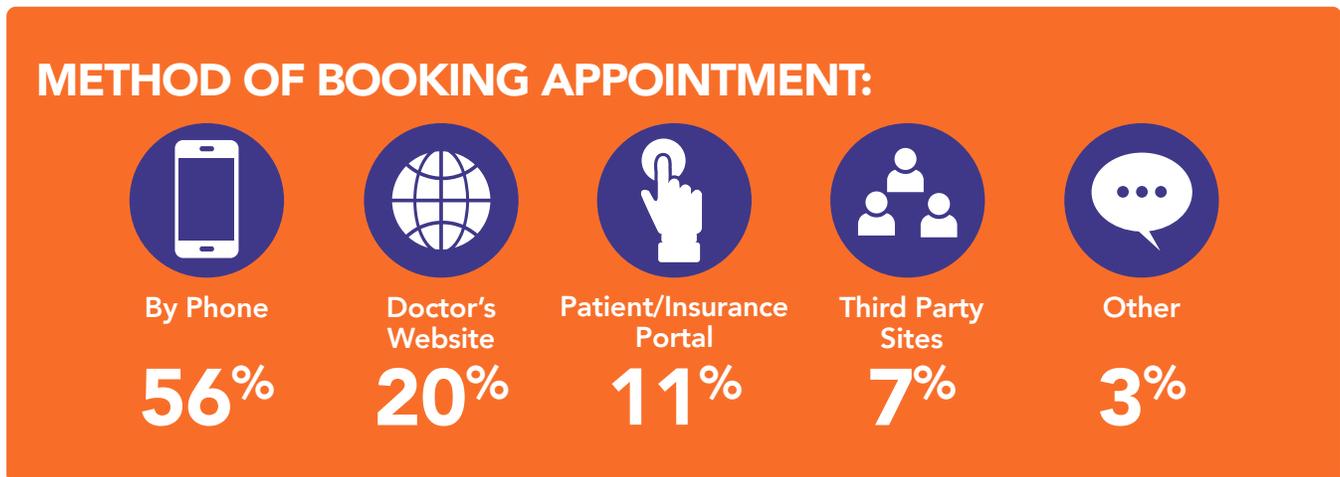


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Booking an Appointment Online

Patients need flexibility and convenience when making an appointment. In 2020, you cannot rely on just one web form or one phone number. Though phone calls remain the preferred method for booking healthcare appointments in the U.S., things are changing in a hurry.

Here is how consumers are booking appointments with doctors this year:



More than half of consumers say they primarily book appointments over the phone. But the share of consumers using third-party sites to book appointments has increased 69% since 2018.

Different generations have unique preferences when it comes to appointment booking, as well. Our survey found that consumers in older age groups are more likely to book appointments by phone, young people book primarily through patient portals and third-party sites, and middle-aged Americans most frequently use both phone calls and hospital/facility websites.

We also asked if booking virtual visits took consumers a different route. Out of those who have booked telehealth appointments, the breakdown is similar to booking in-person visits: Phone calls were the most popular, followed by the hospital/facility website. Notably, proportionally more consumers use insurance portals for telehealth booking than for regular appointments.



So, where is the friction in the booking process?

The biggest booking frustration for patients in 2020 is incorrect or missing contact information, along with services not being listed. That means you need accurate information on all the different platforms patients are using to find doctors.

Meanwhile, 10% of consumers say not having enough reviews is their biggest frustration with booking online, and 11% say a lack of physician information is the most frustrating.

Simply put, you need to offer multiple channels for patients to schedule an appointment. Moreover, as millennials continue to age, you can expect to see greater demand for digital appointment-setting options.

According to our consumers, top frustrations with booking healthcare appointments online are:

Incorrect/missing contact info	14%
Services not listed	13%
Not enough physician information	11%
Incorrect hours	10%
Not enough reviews	10%
No insurance information	10%
I don't book healthcare appointments online	9%
Inaccurate map listing	8%
No virtual care options	8%
Other frustrations	3%
I experience no frustrations booking healthcare apts online	5%



With an appointment booked, or at least considered, your communication is key.

Here is a breakdown of where consumers want to hear from local healthcare providers:



32%

Direct mail



29%

Text message



55%

Phone



23%

Social Media



47%

Email



27%

Hospital website

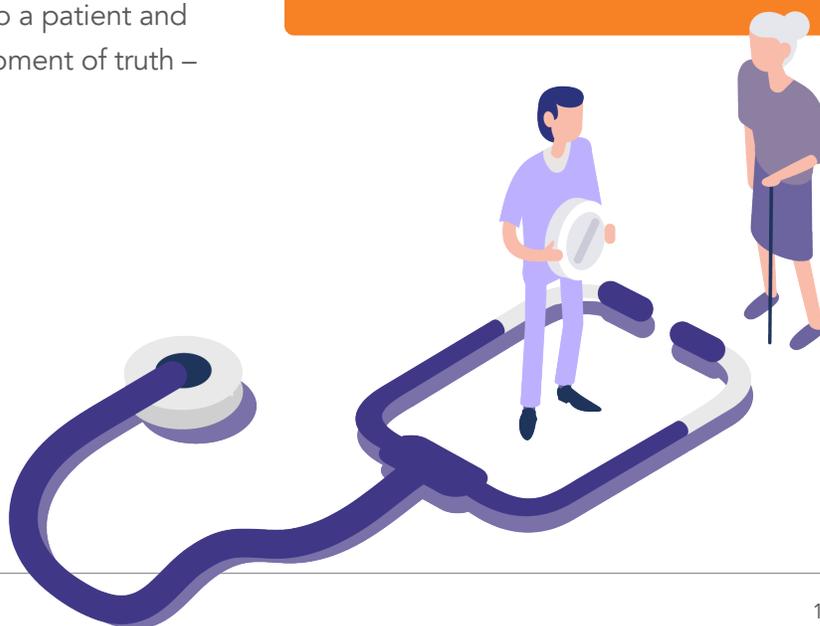
More than half of patients want to receive information from their local healthcare provider through phone calls and 47% want emails – though they are not mutually exclusive. Those are followed by direct mail, text messages, and hospital/facility websites.

With nearly a third of consumers wanting to hear from healthcare providers via text, your mobile engagement strategy should not be limited to testimonial campaigns. Meanwhile, almost one quarter of respondents want social media updates, making Facebook, Twitter and Instagram valuable megaphones for your healthcare brand.

After you have converted a searcher into a patient and concluded the appointment, it is the moment of truth – the testimonial.

More than half of patients want to receive information from their local healthcare provider through phone calls

47% of patients want to receive information from their provider through emails



Sharing Healthcare Experiences

Only 18% of consumers have never shared healthcare feedback on online platforms – a decrease of 75% since 2017. The question is not if, but when and where, your patients will leave reviews.

Positive reviews come from positive customer experiences.

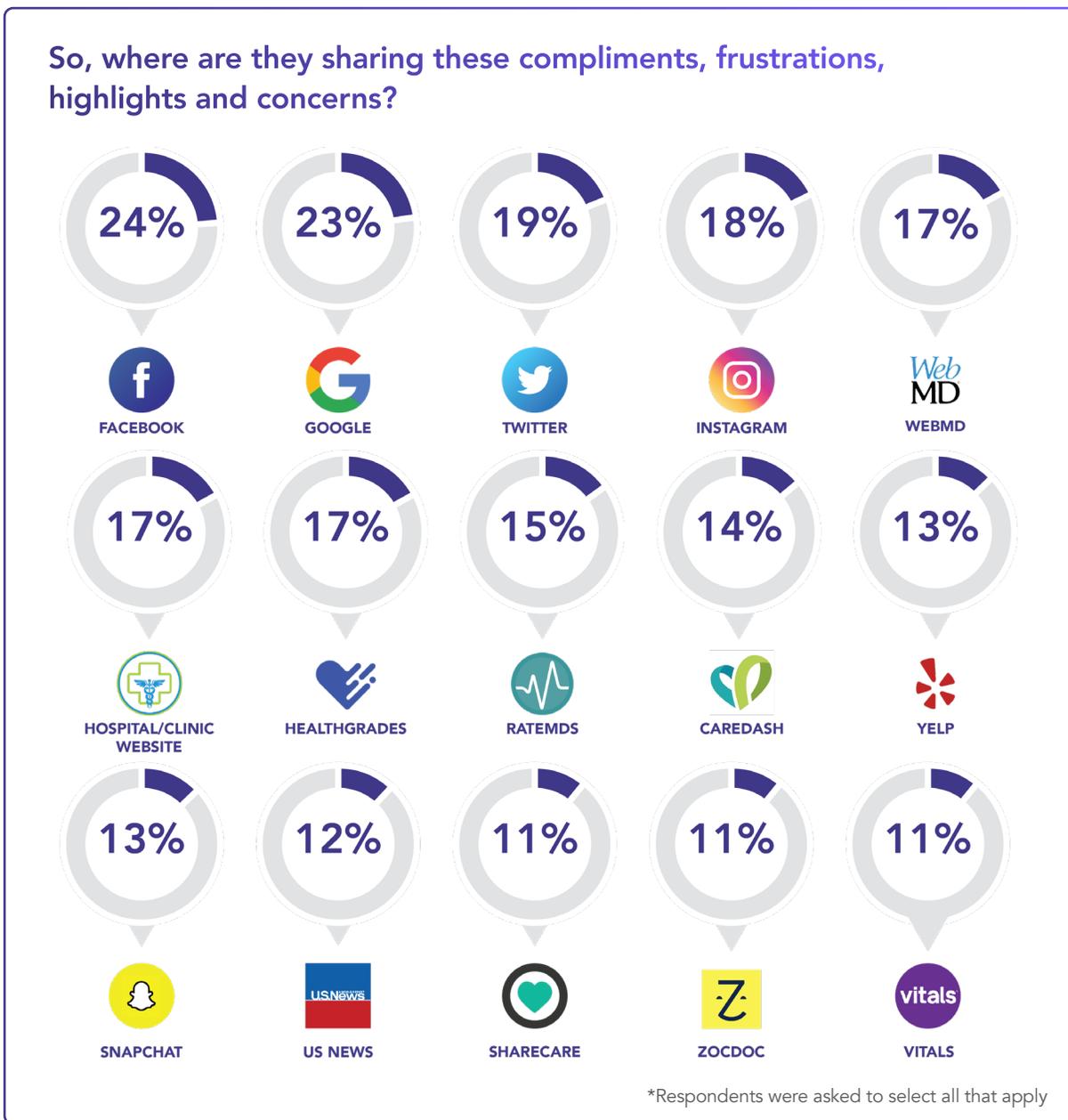


With patient experience becoming such a priority among healthcare providers, we examined factors that matter most to patients when rating or evaluating a physician.



Wait time to see the doctor was the most frustrating part of the patient experience (32%), followed by cost/payment, awaiting exam results, and scheduling the appointment. Communication with the right content, on the right platforms, and consistent patient engagement can fill those gaps in expectation vs. reality.

Working with your insurance provider is becoming a larger frustration for today's healthcare consumers, up 185% from 2017. Meanwhile, the physical exam and awaiting exam results both increased more than 80% as top frustrations since 2017.



Google and Facebook remain at the top, but specialized healthcare listing platforms like Vitals, Zocdoc, and RateMDs have experienced the most growth in the last four years when it comes to sharing patient experiences online. Consumers are using Zocdoc and Vitals over 700% more than they did in 2017.

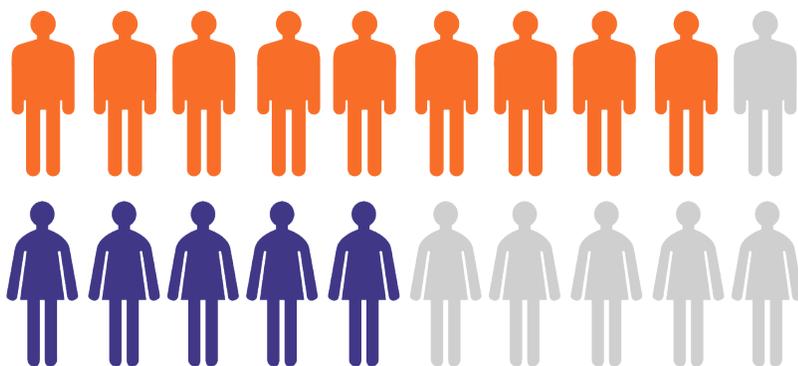
700% Increase
 Consumers are using Zocdoc and Vitals over 700% more than they did in 2017

Facebook remains the most frequently used social media platform for sharing healthcare experiences, but usage of Twitter, Instagram, and Snapchat has more than doubled in four years.



Broken down by age group, patients aged 18-23 most frequently share on Twitter, Instagram, and WebMD. Those aged 24-39 share the most on Facebook, Google, and Twitter. The 40-55 age group is most active on Google, Facebook, and WebMD; while those aged 56+ lean heavily toward Facebook.

Notably, males are sharing about twice as frequently as females on most of the popular review platforms, according to the survey.

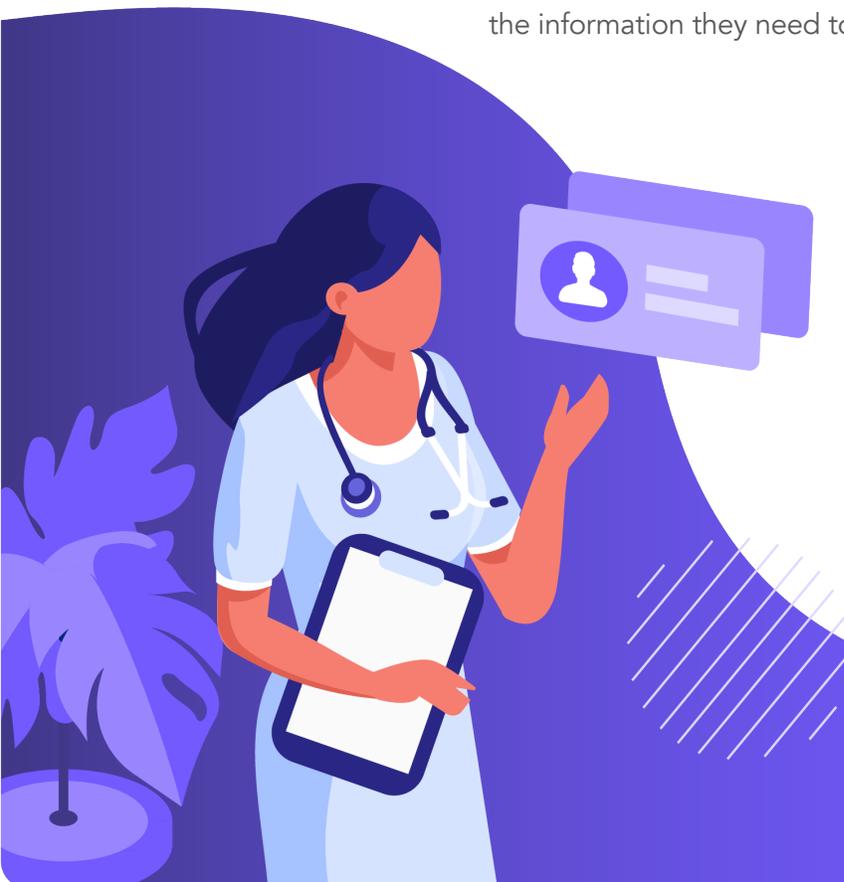


Males share about twice as frequently as females on the popular review platforms

The story looks similar for reviews of virtual visits: Google (29%), Facebook (23%) and Healthgrades (22%) were respondents' top places to share their telehealth experiences online. However, 32% of respondents say they have not shared telehealth experiences online (compared to 18% for in-person visits). There is an opportunity for healthcare marketers to fill that gap in patient feedback by running surveys that ask about telehealth and requesting reviews from virtual patients.



As more Americans share their healthcare experiences online, across a growing list of platforms, healthcare organizations must monitor feedback at every stage of the patient journey. The insights you gain from both positive and negative online feedback will improve your online reputation and your quality of service. Then, you can showcase those reviews and provide patients with the information they need to make informed decisions about their care.



The insights you gain from both positive and negative online feedback will improve your online reputation and your quality of service

Conclusion

Healthcare providers certainly have a full workload when it comes to monitoring the conversation around their brands. Trust is invaluable currency in this industry, and Americans expect your organization to be active in conversations about healthcare issues – with individual patients and with your communities at large.

Those who proactively monitor, manage and improve their online reputation will be able to meet healthcare consumers where they are, when they need help. Here are steps you can take immediately, based on our survey:



As the findings of the 2020 Healthcare Consumer Insight & Digital Engagement survey show, your listings, ratings, and reviews define your all-important Digital Front Door. We hope these insights help you understand what consumers want and ultimately fuel your ability to improve patient acquisition.

Those who proactively monitor, manage and improve their online reputation will be able to meet healthcare consumers where they are, when they need help.

The Platform for Managing Online Reputation

Built for healthcare, Binary Fountain is the leading provider of patient feedback management solutions designed specifically for healthcare in a single cloud-based platform.

Our patient experience platform is built on a proprietary healthcare-centric Natural Language Processing (NLP) engine that mines patient feedback from surveys, online ratings and review sites, social media, and other data sources to equip our clients with actionable insights that are needed to improve patient satisfaction and loyalty, increase engagement and drive sustainable bottom-line results.

Leading organizations, large and small, rely on Binary Fountain to understand the patient experience, drive comprehensive operational intelligence throughout the organization, and engage patients with innovative transparency and reputation management solutions.



[Request Your Free Demo](#)

Explore how Binary Fountain’s solutions can help you efficiently manage your online reputation, improve patient experience, benchmark against the competition, and promote your brand. [Request a free demo here](#)

Our Survey Methodology
Sponsored by Binary Fountain, the “Healthcare Consumer Insight & Digital Engagement” survey was conducted by OnePoll, a marketing research company specializing in online quantitative research and polling, between Sept. 16-17, 2020. Feedback was obtained from more than 1,000 U.S. adults who have visited a doctor in the last year.

Questions about online ratings?
Contact us to learn more.

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Three circular social media icons are displayed in a row. From left to right: a blue circle with a white 'f' for Facebook, a light blue circle with a white bird for Twitter, and a light blue circle with a white 'in' for LinkedIn.