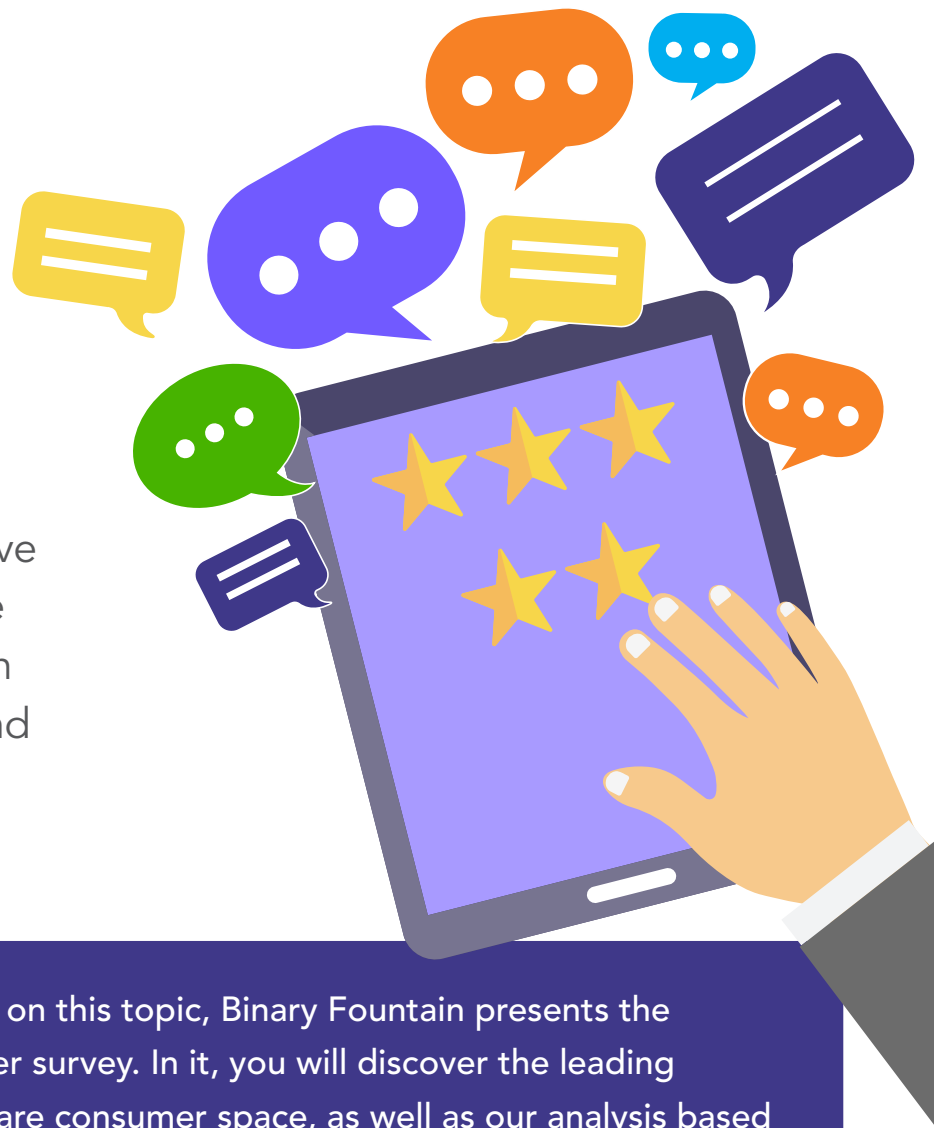


## 2019 Healthcare Consumer Insight & Digital Engagement Survey

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

## Introduction

Consumers increasingly look to online platforms to research and evaluate their purchases of products and services. But until recently, consumers were slower to adopt their online behaviors to the healthcare space. That has changed. Recent years have shown explosive growth in the use of digital tools for research into the choice of physician and healthcare needs.



Now in our third year of research on this topic, Binary Fountain presents the findings from our annual consumer survey. In it, you will discover the leading behaviors trending in the healthcare consumer space, as well as our analysis based on the last three years. Here is what every marketer needs to know about what is changing in online experiences, in regards to how consumers make informed healthcare provider decisions.

Specifically, the findings in this book reveal insights into how patients look to online reviews, ratings and brand reputation when it comes to choosing a provider and, most interestingly, how they are sharing their experiences on social media. We hope this resource proves valuable as you seek to manage your brand's reputation and improve patient experience.

## Consumer Use of Digital Tools for Research Has Soared

The most significant finding of the Healthcare Consumer Insight & Digital Engagement survey is that consumers' use of social media to find physicians has exploded in the last three years. This growth signals a 621% increase since 2017 and is supported by outside studies that show a bulk of users' time is spent on social media platforms.<sup>1</sup>

Other key findings show that while consumers still look for personal recommendations, they are researching the provider's reputation online, even after receiving a recommendation from family and friends or a doctor referral. Additionally, the use of voice search capabilities to find physicians has also made a significant leap, growing 756% since last year. Finally, online search engines remain one of the most popular sources of research for physicians, showing steady growth year-over-year (60% increase since 2017).

This information proves that physicians and healthcare providers must pay attention to online platforms, including social media sites and healthcare listing sites, and manage reviews and ratings accordingly. In the coming pages, we unpack the specifics of the survey findings and opportunities you can take advantage of to meet consumer demand, and most importantly, tailoring the search experience to meet patient concerns.



### CHANGES SINCE 2017

**621%** increase  
in consumers' use of  
social media to find  
physicians

**756%** growth  
in those who used voice  
search capabilities to  
find physicians

<sup>1</sup> Datareportal, "Digital 2019: Global Digital Yearbook," 2019

## Online Reviews and Personal Recommendations Still Factor Highest

Consumers increasingly check reviews before making purchases of any kind, including healthcare services. Although recommendations from friends and family rank among the most important factor when choosing a doctor, online ratings and reviews come in at a close second.

### Most important factors when choosing a physician:



Personal  
recommendations

**52%**



Online ratings/  
reviews

**48%**



Location

**36%**



Hospital  
affiliation

**36%**



Gender

**32%**



Insurance  
Coverage

**27%**



CAHPS  
survey scores

**22%**



The importance of location and insurance coverage made significant drops in the last three years of our survey, indicating that patients are willing to go further and go out of network in order to get the best care for their needs.

Although the Consumer Assessment of Healthcare Providers and Systems (CAHPS) survey factors lower on the list for consumers, it is gaining in importance. Our survey shows a 700% increase in this factor rating over the past three years. Doctors with favorable feedback scores should view this as an opportunity to market themselves on those results by publishing their scores on their website and landing pages.

Physicians and healthcare providers must make managing their online listings and reviews a priority to attract and retain patients. It's no longer enough to have good word-of-mouth patient recommendations or rely on patients to stay in-network for services. Evidence shows consumers are relying more on their own independent research to find the best quality care. In the next chapter, we look at which sites they are finding this information.

Physicians and healthcare providers must make managing their online listings and reviews a priority to attract and retain patients.

**700% increase in  
CAHPS importance since 2017**



## Growing Dependence on Online Ratings and Review Sites for Choosing a Doctor

The rise of online rating and review sites and online ratings has empowered consumers to become more informed and engaged in the process of finding healthcare solutions. Our data tells us that, while listings sites are important, more than half of your potential patients are searching for physicians on Google and increasingly social media platforms.

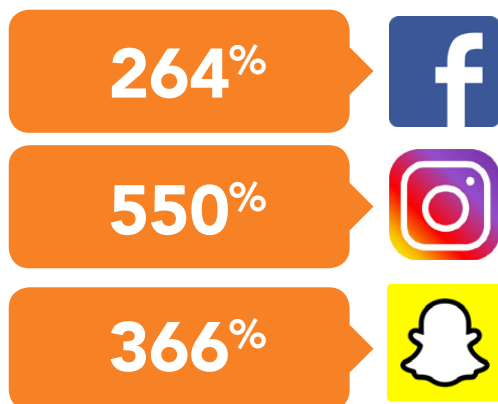
### Top online platforms consumers use to find a doctor:



From retail to healthcare, Google reigns supreme as an online review platform, with 54% of consumers looking to Google ratings and reviews of potential physicians. Specialized healthcare listings sites like U.S. News & World Report, ShareCare and ZocDoc are still gaining more users year-over-year.

But the big story lays with social media. The most striking contrast in consumer behavior is the dramatic increase in social media as a source of health information. In just the past year, the following platforms have seen significant the following percentage of increases in their use for finding a doctor:

## INCREASE IN USE SINCE 2018



From this data we can also see that in the last three years, the number of patients not using online experiences to inform their healthcare choices has decreased by 81%.

What this means for physicians and healthcare providers is that other consumers' opinions online factor heavily into consumer choice. Whether or not a sentiment shared on a social media site reflects the reality of your service, that information influences a potential patient, which we will unpack in the next chapter. The onus is now on the provider to generate more positive reviews and ensure the patient experience matches or exceeds patient expectations.

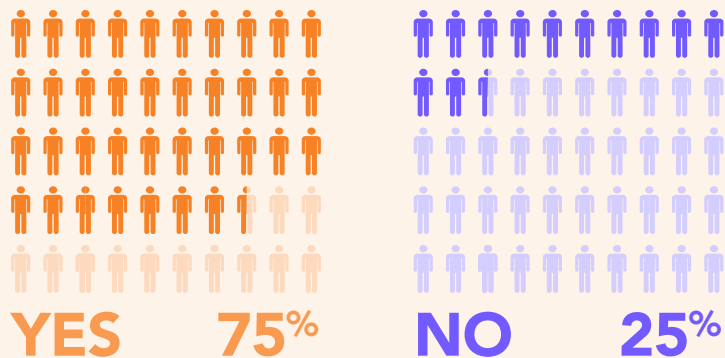


Google reigns supreme as an online review platform, with more than half (54%) of consumers looking to Google ratings and reviews of potential physicians.

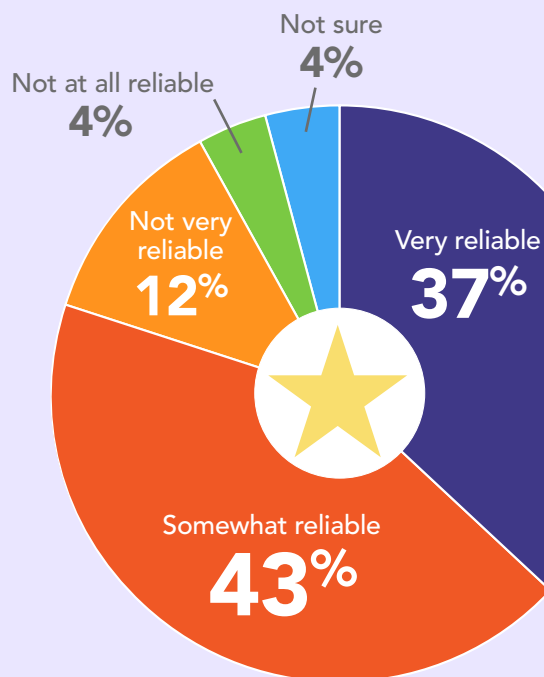
## Patients Trust Online Ratings and Reviews

Healthcare consumers are not only judging potential doctors by their ratings and reviews, but they also trust that what others are saying online is true. In our survey, a full 75% of respondents indicate that online reviews and ratings influence their decisions when choosing a physician.

### Consumers who say online ratings and reviews influence their choice of provider:

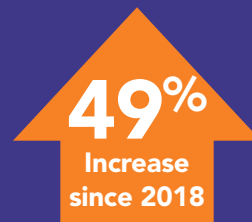


### Patient's trust in reliability of reviews:



We also asked respondents how reliable and trustworthy they feel online reviews and ratings are. Our findings indicate the trust factor is on the rise--more healthcare consumers are convinced that physician ratings and reviews are 'very reliable' (49% increase since 2018) and fewer believe that reviews are 'not at all reliable' (20% decrease since 2018).

This increase in trust also parallels a rise in consumers sharing their healthcare experiences online, especially on social media platforms. In the next chapter, we look at what they are sharing, where they are sharing it, and what factors into their evaluation of their experiences with physicians.



Consumers who  
find physician  
ratings and reviews  
'Very Reliable'



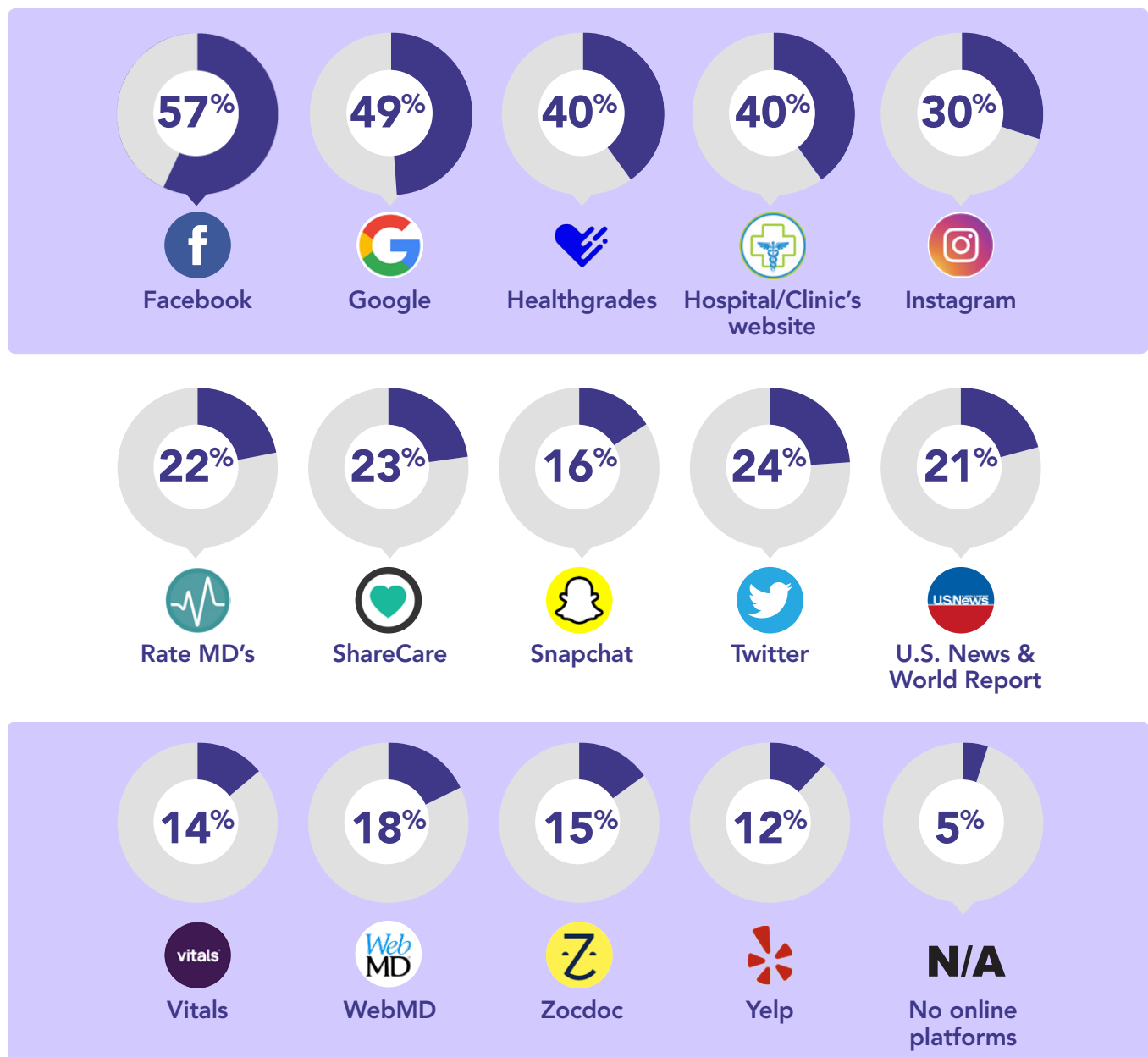
Consumers who  
find physician  
ratings and reviews  
'Not At All Reliable'



# Healthcare Consumers Turn to Social Media to Share Experiences

While Google is the place most consumers turn to first to research a physician, Facebook is where they turn first to share their experiences with them. Facebook is the largest social network worldwide, with 190 million Facebook users in the U.S. alone as of July 2019.<sup>2</sup>

## Online platforms consumers use to share their physician/hospital experiences:



<sup>2</sup> Statista, "Facebook-Statistics and Facts," February 8, 2019

Specialized healthcare listings sites like U.S. News & World Report, ShareCare and ZocDoc have experienced the largest growth of all platforms in the last three years when it comes to patients sharing physician/hospital experiences online. However, outside of Facebook, all social media platforms have more than tripled their amounts of user physician/hospital feedback online since 2017.

Overall, more healthcare consumers are sharing information online now than in the past (93% increase since 2017). For physicians and healthcare providers, this means the number of places where reviews of your practice can be found is increasing, as are the number of reviews that can be found there. Consumers are talking about their healthcare experiences--a lot.

Providers need to listen and be prepared to not only answer specific comments or complaints, but also to adjust their services and marketing to respond to consumer sentiment.

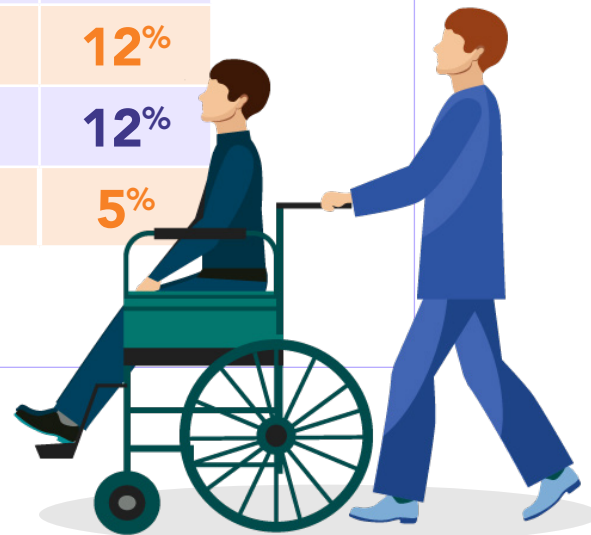


## Characteristics that Factor into Consumers' Evaluation of Experiences

In a world where consumers can rate everything from the friendliness of a barista to the cleanliness of an auto repair shop, it stands to reason that a personal experience with a physician or hospital would be shared online. After all, if consumers look to reviews to make a decision on whether to visit an office, they believe that others will benefit from sharing their view as well.

### Most important factors when evaluating physicians:

Thoroughness of the examination	41%
Friendly and caring attitude	39%
Ability to answer all your questions	36%
Including you in decisions about your care or treatment	33%
Previous success in treating the illness	23%
Clear and direct instructions on taking care of your health condition	20%
Following up on any problems or concerns	18%
Amount of time spent with you	16%
Timely return of lab or test results	12%
Reputation of a provider in the community	12%
Not applicable / No particular factor	5%

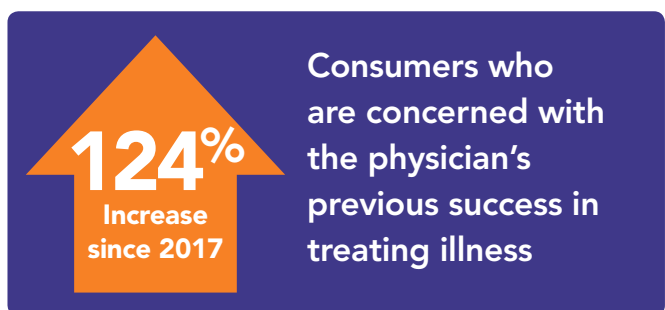
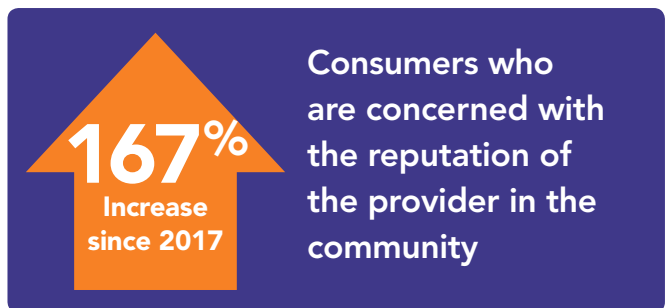
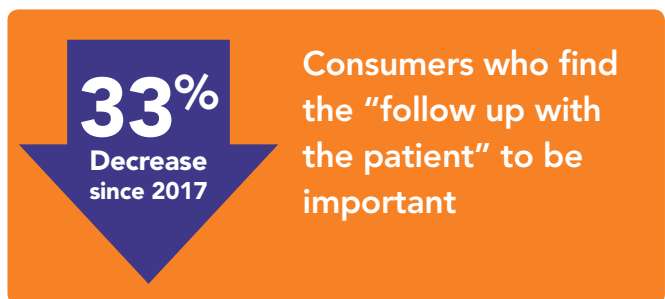
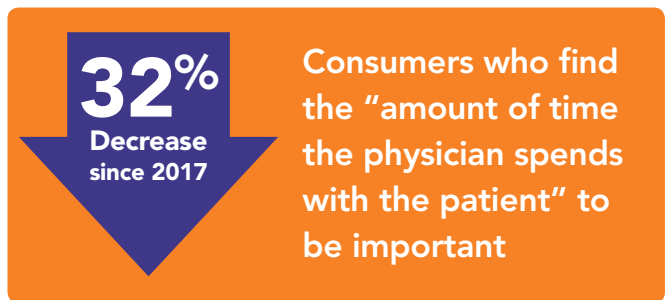


In an interesting shift, healthcare consumers are no longer finding personally directed behaviors like “amount of time with the patient” or “follow-up with the patient” as important as they used to. The number of responses in this category has decreased 32% and 33% since 2017, respectively. Moreover, patients are increasingly concerned about the “reputation of the provider in the community” and “previous success in treating illness.” These factoring characteristics have increased 167% and 124% since 2017, respectively.

This means just as much attention must be paid to monitoring and responding to online ratings and reviews than improving the standard of care or “bedside manner” in the exam room.

You can do this by monitoring feedback at every stage of your patients’ journey, from office wait times to post-treatment follow-up. Use the insights you gain from both positive and negative online feedback to improve your delivery of service. Are consumers expressing frustration with your billing process? Is a particular provider receiving negative comments about their treatment recommendations? Do patients compliment your staff’s professionalism?

Many of the factors today’s consumers care about involve communication. So be particularly on the lookout for ways in which you can improve the delivery of information to your patients.



## Healthcare Consumers Seek Digital Options for Booking

As consumers increasingly spend time online, they look to online options for managing their life. This includes scheduling appointments. Consumers look for flexibility and convenience not just when making an appointment but how they make it. Customers want the same level of convenience and choice that they experience from other industries. Whether it is for a hair appointment, service call or an appointment with a physician, consumers expect online options for scheduling.

### Method of booking appointment:



By phone

**47%**



Doctor's  
Website

**29%**



Patient  
portal

**16%**



Third party  
sites

**6%**



Other

**6%**

In our survey, we found that fewer people are making doctor's appointments by phone. This method of booking has decreased by 45% from last year. Increasingly, patients are seeking to book appointments directly from a doctor's website (up 100% from last year).

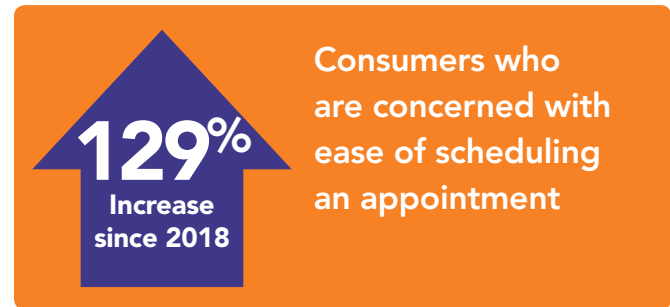
In fact, the ease of scheduling an appointment factors highly among consumers' frustrations about their physician experiences. In the next chapter, we look at this and other factors that contribute to common complaints.

The ease of scheduling an appointment factors highly among consumers' frustrations about their physician experiences

## Ease of Scheduling and Wait Times Are Critical to Winning Business

As mentioned in the previous chapter, scheduling an appointment is a major pain point for patients. This factor rose 129% in importance from last year.

Moreover, the main frustration patients have – “wait time to see a doctor” – has decreased. Nearly half of all healthcare consumers used to name “wait time” as their biggest pain point; today, only 28% do so.



### Top frustrations in the patient journey:



Scheduling an appointment  
**20%**



Parking/Commute  
**7%**



Wait time to see the doctor  
**27%**



The Physical Exam  
**10%**



Awaiting exam results  
**15%**



Cost/payment  
**11%**



Working with your insurance provider  
**4%**



In addition, more patients are factoring in “physical exams” and “awaiting exam results” as pain points than in the past (up 146% and 137%, respectively).

Now that we’ve unpacked all the major findings from the 2019 Healthcare Consumer Insight & Digital Engagement survey, in the next chapter, we will dive into what the implications are for physicians and healthcare marketers who seek to improve patient satisfaction scores and bolster their online reputation.

## What Do These Results Mean for Physicians?

Neuroscientists have proven that humans are driven by feelings, and feelings drive decisions. Research published in the American Psychological Association's *Emotion* magazine found that people often make "feeling-based choices" by consulting their "intuitive, gut feelings" rather than thinking about the facts related to each option. Further, once they have made a feeling-based decision, they are likely to stick to it.<sup>3</sup>

This has very real implications for physicians and hospitals when it comes to marketing their services. Those who are proactively monitoring, managing and growing their online reputation will be able to meet healthcare consumers in their time of need better. And as the findings of the 2019 Healthcare Consumer Insight & Digital Engagement survey show, is more important than ever to focus on the growth of social media and manage conversations across social platforms. In the next chapter, we cover some of the best practices you should have in place in the coming year.



## Managing Your Online Reputation

To be successful, online reputation management (ORM) has to be part of an overarching strategic marketing plan. When employed correctly, it will:

**Help consumers  
find your business  
in search engines**

**Facilitate meaningful  
engagement with  
your target audience**

**Elevate positive  
feedback and  
address potential  
issues**



<sup>3</sup> Emotion, "Feeling Certain: Gut Choice, the True Self, and Attitude Certainty," September 1, 2018

While the exact process is different for every business, there are critical areas to address to achieve positive ORM results.

## Claim your listings

**Complete and accurate business listings** affect everything from immediate search engine results to long-term brand health.

## Manage the conversations

**Respond to all reviews** – Establish a patient review response system so that you are addressing issues in a timely manner. Know when to take a conversation offline.

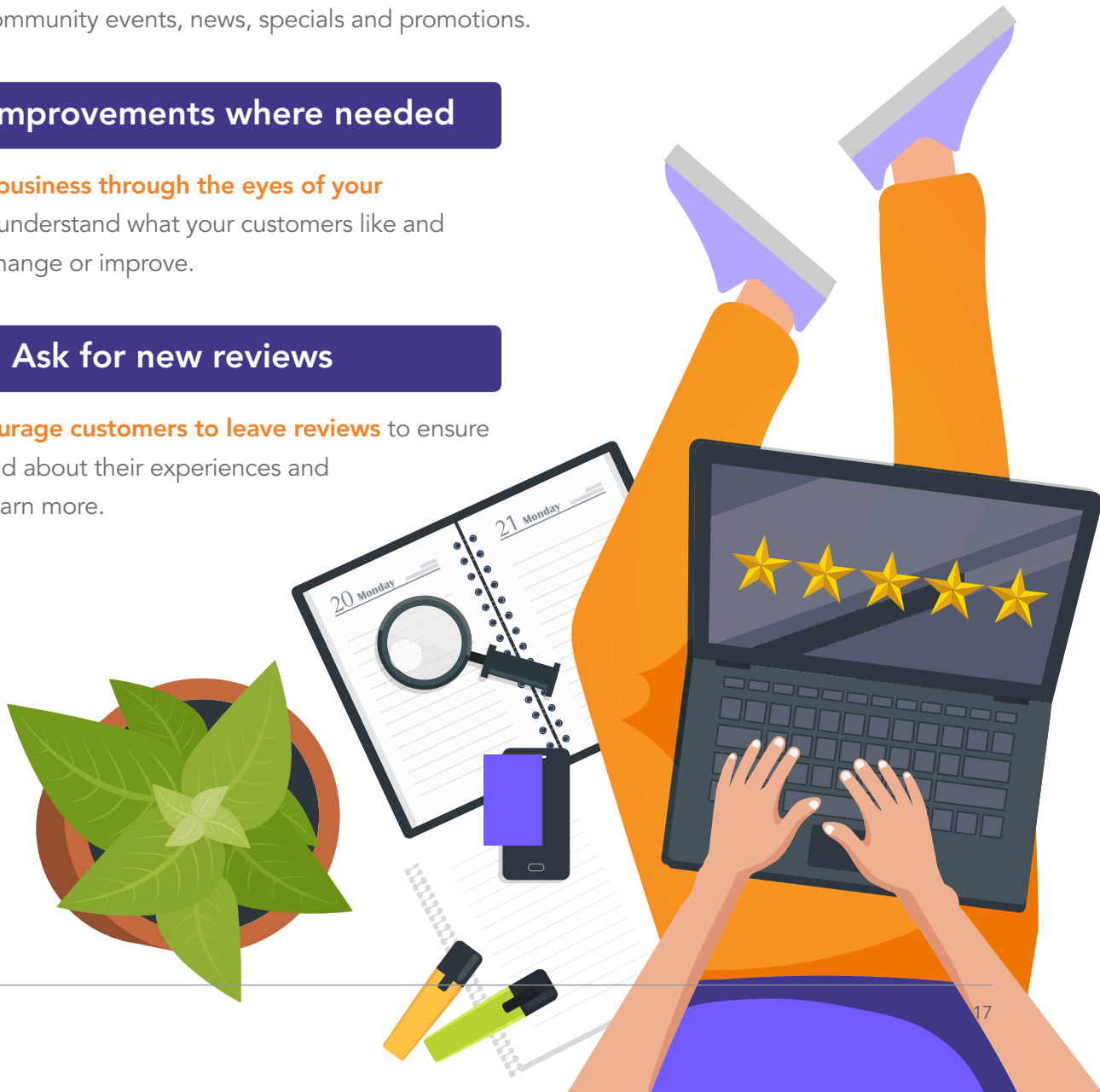
**Engage on social media** – Consumers want businesses to have a social media presence. Try engaging content like community events, news, specials and promotions.

## Make improvements where needed

**Look at your business through the eyes of your customers** to understand what your customers like and what should change or improve.

## Ask for new reviews

**Actively encourage customers to leave reviews** to ensure that others read about their experiences and follow up to learn more.



# 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 at <https://www.binaryfountain.com>.

### Our Survey Methodology

Sponsored by Binary Fountain, the "Healthcare Consumer Insight & Digital Engagement Survey" was conducted by One Poll between July 25-26, 2019. Feedback was obtained from 1,000 U.S. adults who go to the doctor.

Questions about online ratings?  
Contact us to learn more.

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