



CONSUMER EXPERIENCE TRENDS IN HEALTHCARE 2021



In association with
 PRESS GANEY®



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INTRODUCTION

As digital consumerism in healthcare accelerates, expectations for the patient experience (PX) continue to evolve in equal measure. The “patient experience” can no longer be defined by the clinical care setting alone. Today, the patient experience encompasses every step of the healthcare journey, including navigating the web, scheduling, billing, insurance, and beyond.

While the pandemic drove upticks in some consumer digital behaviors, overall, the digital preferences that had gained positive momentum in 2019 are now hard-coded into the consumer healthcare journey. From researching doctors to scheduling—and even conducting—appointments, these touchpoints are happening online.

Press Ganey surveyed more than 1,000 adults¹ to take the pulse of current consumer preferences and expectations for healthcare. This report explores the following topics in depth.

Digital drives choice: Patients rely on digital resources 2.2x more than provider referrals when choosing a healthcare provider.

Referral leakage: 84% would not see a referred provider if they were rated under 4 stars.

The rise of virtual health: Over 1/3 of patients have used telehealth in the past year—a 337.6% increase since 2019.

Patient as customer: Assuming quality care, patients rate “customer service” (70.8%) and “communication” (63.4%) as more important than even “bedside manner” when it comes to a 5-star experience.

Shopping for healthcare: On average, consumers use three different websites during their healthcare research process and read 5½ reviews before making a decision.

Failure to examine the consumer experience at every touchpoint can negatively impact a healthcare organization’s brand, reputation, and revenue. This report provides a roadmap to accelerate your digital transformation strategies in 2022 and convert more care seekers into happy, loyal patients.

THE MODERN PATIENT JOURNEY

1.

DISCOVERY

Patients rely on digital sources 2.2x more than doctor referrals when choosing a primary care provider



Primary care near me



Dr. Gabriella Diaz
Primary care
★★★★★ 51 reviews
Practices in Durham, NC

Dr. Jack Yamada
Primary care
★★★★★ 72 reviews
Practices in Durham, NC

Katie Matthews
Physical medicine
★★★★★ 0 reviews
Durham, NC

Dr. Amy Johnson
Primary care
★★★★★ 37 reviews
Practices in Durham, NC

Dr. Robert Johnson
Primary care
★★★★★ 1 review
Practices in Raleigh, NC



2.

CONSIDERATION

Patients will consider 2.7 online sources and 5.5 online reviews during their provider selection process

SELECTION

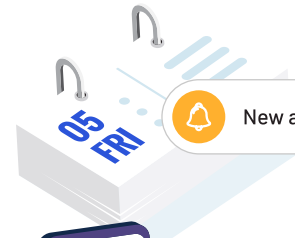
Ratings and reviews are the #1 factor influencing a consumer's decision to book an appointment



4.

SCHEDULING

63% prefer to book an appointment digitally (vs. 36.8% by phone call)

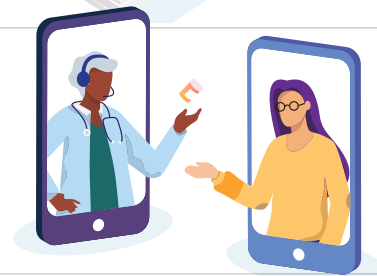


New appointment

5.

CARE

338% increase in telemedicine appointments from 2019



6.

SATISFACTION

#1 factor in earning a 5-star review is the quality of customer service during a visit



Dr. Gabriella Diaz
Primary care
★★★★★ 72 reviews

!

REFERRAL LEAKAGE

84% would *not* see a referred provider with less than a 4-star rating



Both my cousin and I go to **Amy Johnson** over on Patterson Place. She's great!

From Sammi



Dr. Amy Johnson
Primary care
★★★★★ 37 reviews



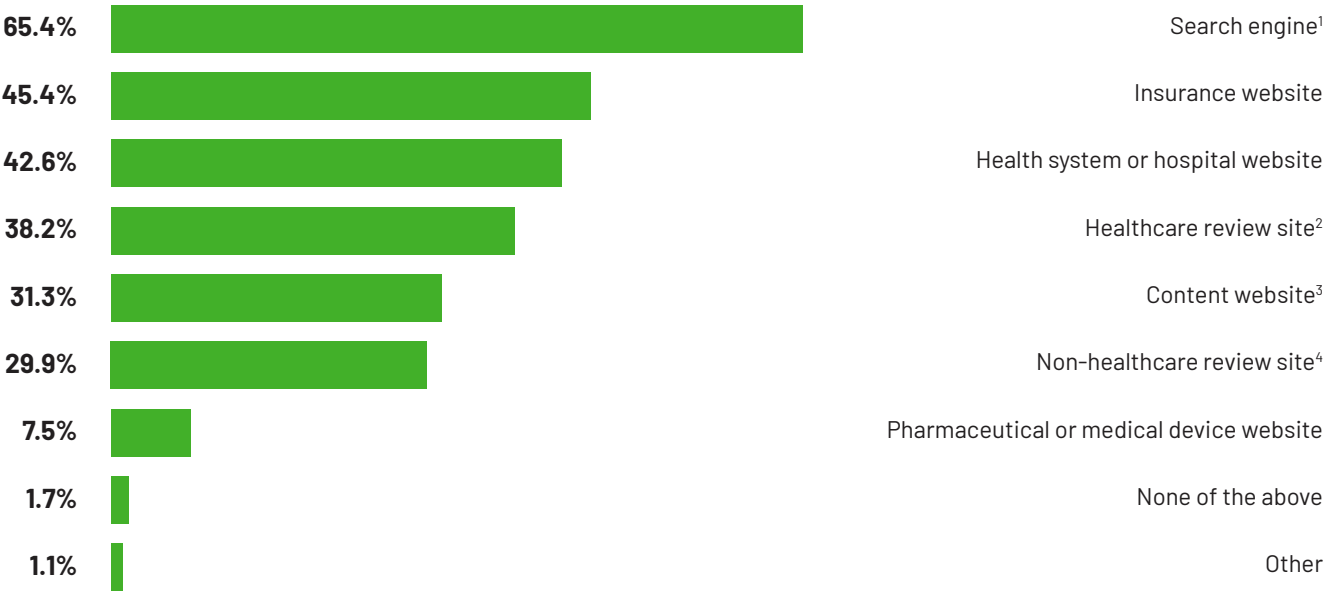
SHOPPING FOR CARE

When searching for care online, 57.4% of consumers prefer the convenience of mobile devices and 41.6% prefer to use a laptop or desktop.

While search engines are the most utilized digital resource (65.4%), consumers use an average of 2.7 different sites in their care-seeking journey. Compared to 2019, there has been a 22.8% decline in the use of search engines and, in contrast, a 53.7% increase in the usage of healthcare review sites (e.g., Healthgrades and Vitals). More consumers this year are also using content websites as well as non-healthcare review sites. These trends indicate a steady convergence between healthcare and retail behavior, with consumers increasingly turning to digital resources like online reviews to inform and validate their decisions.

Consumers use
~3
different online
sources when
searching for a
healthcare provider

Select all resources you used, if any, in your online search for a healthcare provider.



¹ Google, Bing, etc.

² Healthgrades, Vitals, ZocDoc, etc.

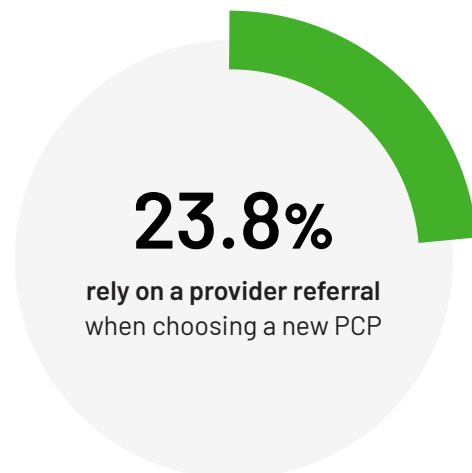
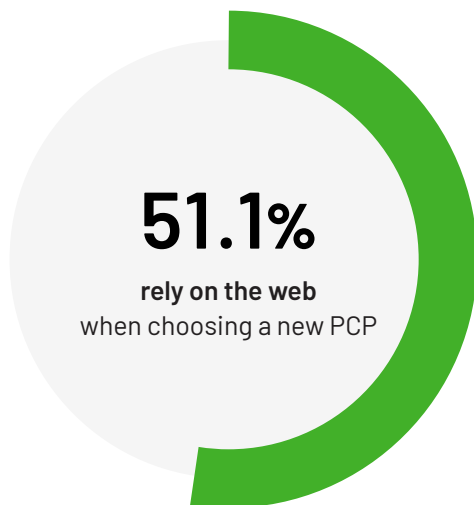
³ WebMD, Mayo Clinic, etc.

⁴ Yelp, Facebook, Google reviews, etc.

PROVIDER SELECTION IN THE DIGITAL AGE

Consumers rely heavily on digital channels when selecting a provider. Today, 51.1% of patients turn to the web when choosing a new primary care provider (PCP), while 23.8% first seek referrals from another healthcare provider and 4.4% from an insurance or benefits manager. More specifically, consumers rely on “search” almost as much as they do doctor referrals (22% vs. 24%, respectively) to find a PCP.

Before the moment of conversion—when consumers make an appointment with a doctor—the most important deciding factor is “ratings and reviews of the specialist or provider,” consistent with 2019 trends. Doctor referrals and facility ratings were the second- and third-most-important factors.



Patients rely on digital sources

2.2x more

than doctor referrals when choosing a primary
care provider

Before you schedule a doctor's appointment, what factors matter most to you in your research process?

RANK	FACTOR
1	Ratings and reviews of the specialist or provider you're considering
2	Referral from a current doctor
3	Ratings and reviews of the facility
4	Quality and completeness of doctor's profile on a website or online directory
5	Doctor's ranking in search results
6	How high quality the doctor's website or app is
7	Doctor's presence on social media platforms

In this era of empowered healthcare consumers, they expect easy and streamlined access to care. Given these high expectations, more people (54.4%) consider their healthcare journey difficult today than in 2019 (50.4%). According to respondents, the top three challenges in finding a healthcare provider are: (1) appointment availability, (2) finding an in-network doctor, and (3) taking too much time.



54.4%

of consumers say that the process of finding and choosing a provider is somewhat to very difficult

PROVIDER SELECTION IN THE DIGITAL AGE

ZOOMING IN ON SEARCH

Over 65% of consumers use search engines in their journey to care. But how they conduct their online search varies from person to person. The majority (47%) will type in the provider they're looking for locally. Surprisingly, only 16% will search by entering their "concern, condition, or treatment needed" into the search bar.

Search engines are rarely the final destination but rather serve as a gateway or jumping-off point to other websites that help inform provider selection. Among the top five websites used, consumers rely on hospital (or clinic) websites, WebMD, Healthgrades, and Facebook the most.

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

47.2%	<i>I enter the type of doctor or specialist¹ I'm looking for and "near me"</i>
15.8%	<i>I enter my healthcare concern, condition, or treatment needed and "near me"</i>
15.4%	<i>I enter the name of a clinic, practice, or hospital</i>
13.8%	<i>I enter the name of a specific provider or specialist</i>
5.5%	<i>I use maps to find the closest clinic, practice, or hospital</i>

¹ e.g., primary care provider, dermatologist

Top 5 Sites in the Patient Journey



78.1%
GOOGLE



36.3%
HOSPITAL/CLINIC
WEBSITE



26.8%
WEBMD



22.3%
HEALTHGRADES



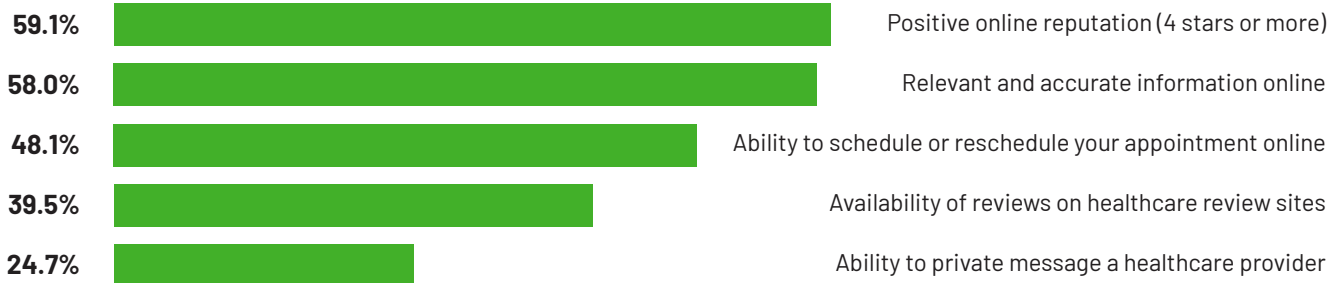
19.5%
FACEBOOK

PROVIDER SELECTION IN THE DIGITAL AGE

THE COMPETITIVE EDGE

Consumers use multiple data points to weigh the pros and cons before booking. When evaluating providers, they look for a positive online reputation (59%) and the availability of relevant and accurate information online (58%) before deciding on one provider over another. The availability of reviews on sites like Healthgrades and Vitals has won over 40% of respondents, and one out of four also reports that the ability to direct message (DM) or private message a provider has impacted their decision.

The following factors have impacted my decision to choose one healthcare provider over another. (Choose all that apply.)

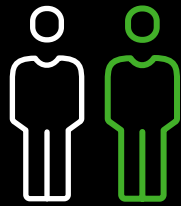


A positive online reputation (4+ stars) is the
#1 deciding factor
in choosing one provider over another

BUILDING TRUST THROUGH REVIEWS

Reviews are the #1 most important factor in a patient's decision to book an appointment with a provider. But not all feedback is created equal. Patients value authentic and informative reviews more so than the total volume of reviews. In fact, 61% say that poor-quality reviews would discourage them from seeking care with a provider.

Recency is the second-most-critical factor. Over 57% of consumers say that the date of a provider's last review is important, representing a nearly 15.7% jump since 2019. Recency has likely become more important in the COVID-19 era, where recent reviews shed light on the current status of a clinic or facility.



1 in 2 patients

has left an online review for a hospital



On average, patients read

5½ reviews

when deciding whether or not to book with
a doctor

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

68.2%	Quality of reviews (e.g., from a credible source, helpful, gives valid and reasonable feedback)
57.0%	Date of most recent review
54.7%	Doctor's average rating
43.4%	Total number of reviews
27.5%	Availability of reviews on more than one website
1.9%	Other

BUILDING TRUST THROUGH REVIEWS

DELIVER A 5-STAR EXPERIENCE

A consumer's definition of patient experience (PX) is not limited to the clinical or care setting. When patients evaluate their overall satisfaction with a healthcare brand, they consider every touchpoint in their journey, including any online interactions.

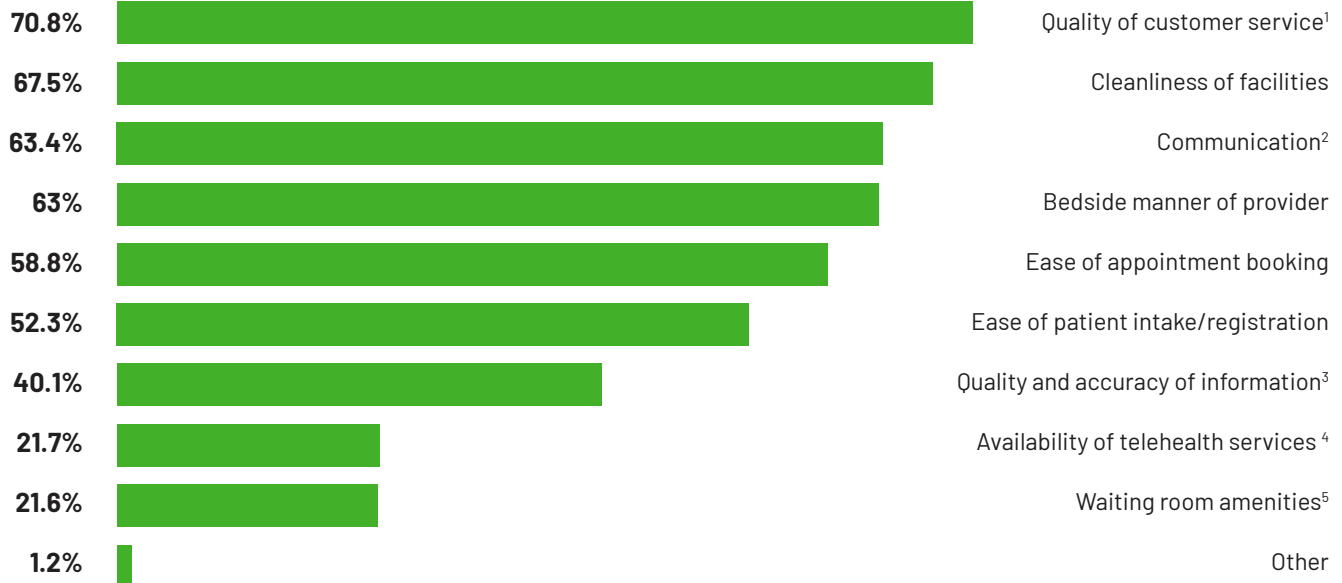
Online ratings often hold a mirror to PX scores. 76.7% of respondents say that online reviews accurately reflect their own personal experiences with that provider or organization. Only 2.6% say that reviews were “not at all accurate.”

High-quality customer service remains the top driver of 5-star reviews. But more than half of patients also cite convenience factors—like communication, appointment booking, and a seamless intake/registration process—as key to earning top marks.

77%

of consumers say that online reviews accurately reflect their patient experience

Beyond receiving excellent care, which of the following factors matter when giving a 5-star review to a healthcare provider? (Choose all that apply.)



¹ e.g., demeanor, attentiveness, helpfulness of staff and practitioners

² e.g., follow-up appointment reminders, annual checkup reminders

³ about the healthcare provider online

⁴ phone or video appointment

⁵ e.g., magazines, water

Consumers also value digital access to care. 63.1% prefer digital appointment booking options (i.e., online, via an app, or through email) to scheduling over the phone. 40% of patients say that the quality and accuracy of online information about a provider is a key element of a 5-star experience.

40%

of patients say that the availability of accurate information online is key to earning a 5-star review

63.1%

prefer scheduling an appointment online vs. over the phone

GAPS IN PATIENT ACQUISITION

Once a consumer has selected a provider, acquisition still isn't guaranteed. Many factors prevent a consumer from becoming a patient.

"Difficulty contacting the office" is the #1 reason a patient is deterred from booking an appointment. The second-biggest blocker of successful acquisition is untrustworthy reviews, followed by an average rating of less than 4 stars and incomplete listings information.

Difficulty contacting the office is the
#1 roadblock
to acquisition

84%
of patients would change their mind about seeing a provider rated less than 4 stars

Prevent referral leakage

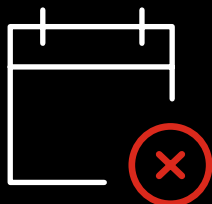
Referrals are still a critical part of the patient journey—but no longer enough to secure a patient. After receiving a referral, 83% of patients today will go online to read reviews about the referred provider. And 84% say they will change their mind about a referred provider if they are rated less than 4 stars.



84%
would **not** see a referred provider if they had a weak online reputation (less than 4 stars)

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.)

- 62.1%** Difficulty contacting the office (e.g., long hold times)
- 61.2%** Poor quality of reviews (e.g., reviews seem sponsored and/or untrustworthy)
- 38.8%** Average rating of less than 4 stars
- 37.2%** Incomplete listings information (e.g., not enough relevant information found online)
- 34.7%** Outdated, hard-to-navigate website
- 31.7%** Incomplete doctor profile on hospital or third-party directory (e.g., no headshot, biographical info)
- 31.3%** Not enough patient reviews (e.g., 5 or fewer)
- 28.5%** Lack of online scheduling options
- 25.0%** Not enough patient reviews on third-party websites
- 17.9%** Lack of telehealth options (i.e., phone or video consultations)
- 2.1%** Other



Untrustworthy reviews are the

#2 reason

consumers will not book an appointment with a provider

THE KEY TO PATIENT LOYALTY

While delivering safe, high-quality, patient-centered care remains the top priority for healthcare providers, consumers demand great “customer service” and strong communication throughout the experience. In fact, respondents cite the demeanor of front office staff as being more important than bedside manner in earning their loyalty and impacting their likelihood to recommend.

59% of patients consider good pre- and post-appointment communication as key to their loyalty—a 27.9% uptick since 2019. More than a third also value text and email appointment reminders.

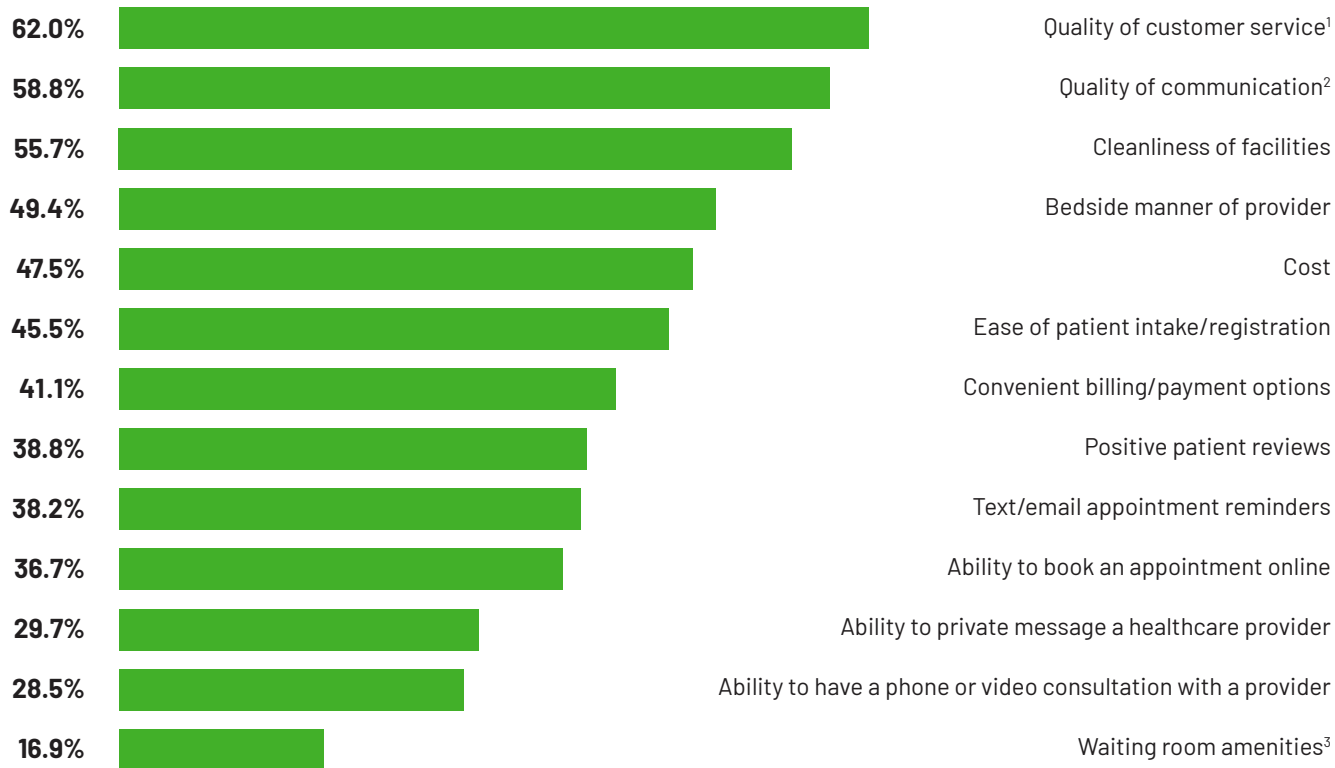
Now more than ever, patients prioritize convenience and time-saving factors. Compared to 2019, more respondents factor in telemedicine capabilities and “ease of intake” when deciding their loyalty.

How Loyalty Has Changed Since 2019

While consumers report that many factors contribute to loyalty, 2021 saw notable increases in the following.



Assuming you are receiving quality care, what other factors influence your loyalty to a provider (i.e., you would recommend them to a friend or seek care from them multiple times)?
(Choose all that apply.)



¹ e.g., demeanor, attentiveness, helpfulness of staff and practitioners

² before and after appointment

³ e.g., water, magazines

DIGITAL ADOPTION ACROSS GENERATIONS

All generations are increasingly mobile. Today, 43.8% of boomers and 60.2% of millennials and Gen Z prefer to research healthcare providers on a smartphone or tablet, representing a 26.7% and 13% shift from 2019, respectively. When it comes to making an appointment, 38.7% of boomers want to schedule online, via an app, or through email, compared to 72.3% of millennials and Gen Z. Telemedicine adoption jumped 2,840% for boomers, with a 210.7% increase among younger generations.

The use of healthcare review, content, and hospital websites has spiked among boomers since 2019—most notably, reliance on sites like Healthgrades and Vitals jumped 38%. For younger generations, the use of healthcare review sites is up 48.7%.

Boomers are more reliant on doctor referrals, but ratings and reviews aren't far behind. Among millennials and Gen Z, referrals rank below doctor and hospital ratings and reviews.

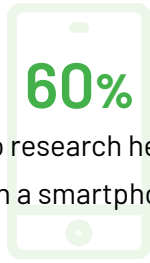
Despite being more digitally savvy, 59.7% of millennials and Gen Z (vs. 41% of boomers) describe the process of finding and selecting a doctor as somewhat to very difficult. Across generations, finding a provider with appointment availability and in network are top challenges, as is how long the overall process takes.

Boomers maintain higher standards for care: 45.6% consider 4 (out of 5) the lowest-acceptable rating for a provider, while only 29.1% of millennials and Gen Z say the same. Boomers are also more vocal online: 57.1% have left a review for a provider or hospital vs. just 44.8% of millennials and Gen Z.

While quality of customer service is the top driver of patient loyalty across the board, younger demographics are more likely to cite cost (52.8%) and convenient billing/payment options (44.1%) than boomers (38.7% and 32.3%, respectively).

MILLENNIALS + GEN Z**VS.****BOOMERS****60%**

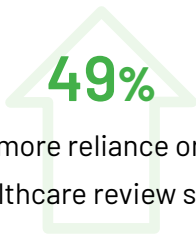
prefer to research healthcare
providers on a smartphone or tablet

**44%**

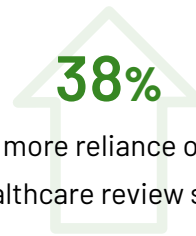
prefer to research healthcare
providers on a smartphone or tablet

**49%**

more reliance on
healthcare review sites*

**38%**

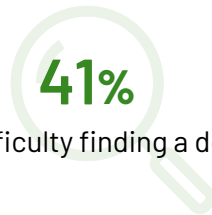
more reliance on
healthcare review sites*

**60%**

have difficulty finding a doctor

**41%**

have difficulty finding a doctor

**29%**

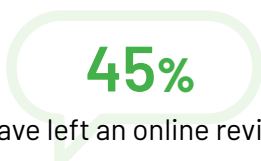
say 4 (out of 5) is the
lowest-acceptable star rating

**46%**

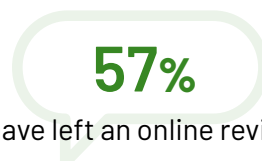
say 4 (out of 5) is the
lowest-acceptable star rating

**45%**

have left an online review
of a provider or hospital

**57%**

have left an online review
of a provider or hospital



KEY CONSIDERATIONS

As healthcare leaders prepare for the year ahead, one thing is clear: Organizations must prioritize their digital consumerism strategies not only to keep up with current expectations, but to also successfully acquire and retain patients for years to come.

Consider the following takeaways to optimize your organization's digital touchpoints in 2022 and beyond:

Search is provider-first: In order to improve your organization's brand and visibility, ensure provider listings are accurate and complete. Consumers use provider listings to determine their selection.

Digitize access: Difficulty contacting the office is the #1 reason patients won't book with a selected provider. By providing online appointment booking options, you avoid losing new patients to long hold times and also improve patient satisfaction.

Protect referrals with reviews: Prevent potential referral leakage by implementing reviews at the provider level. Don't worry about volume: Since patients place a premium on the authenticity of reviews, consider leveraging existing PX surveys as a part of your online reputation strategy.

Look beyond the digital front door: Consumers will interact with your organization across myriad touchpoints online—many of which lie outside your website domain. Assess the health and quality of your entire “digital footprint”—which is the sum of your location and provider listings across the web. Focus on optimizing listings on healthcare review sites like Healthgrades, which see a high rate of patient conversion.

Embrace a “customer service” mindset: Since great customer service is a key driver of loyalty and high online ratings, leverage frequent “front office” engagement surveys to drive effective performance improvement strategies.

ACCELERATE
YOUR CX JOURNEY

To learn more about Press Ganey's
Consumer Experience solution, visit:
pressganey.com/cx

SURVEY METHODOLOGY

This survey depicts findings from 1,140 respondents representing the U.S. adult census demographic of regions, incomes, and genders, age 18 to 60+. Research was commissioned by Press Ganey and conducted through an independent third-party market research agency during September 2021.

GENDER DATA	REGION DATA	HOUSEHOLD INCOME
Male: 43.60%	East North Central: 14.22%	< \$9,999: 6.14%
Female: 56.40%	East South Central: 4.98%	\$10,000–\$24,999: 10.53%
	Middle Atlantic: 15.73%	\$25,000–\$49,999: 21.49%
	Mountain: 8.44%	\$50,000–\$74,999: 20.00%
	New England: 5.16%	\$75,000–\$99,999: 13.60%
	Pacific: 14.67%	\$100,000–\$124,999: 7.89%
	South Atlantic: 20.62%	\$125,000–\$149,999: 4.91%
	West North Central: 6.13%	\$150,000–\$174,999: 2.19%
	West South Central: 10.04%	\$175,000–\$199,999: 1.49%
		> \$200,000: 3.68%
		Prefer not to answer: 8.07%

ABOUT PRESS GANEY

Press Ganey pioneered the healthcare performance improvement movement 35 years ago. Today, Press Ganey offers an integrated suite of solutions that enable enterprise transformation across the patient journey. Delivered through a cutting-edge digital platform built on a foundation of data security, Press Ganey solutions address safety, clinical excellence, patient experience, and workforce engagement. The company works with more than 41,000 healthcare facilities in its mission to reduce patient suffering and enhance caregiver resilience to improve the overall safety, quality, and experience of care.



ABOUT INSYNC

Insync is the licensee of Press Ganey in Australia, New Zealand and Asia. Our specialist team partners with hundreds of healthcare organisations around Australia and Asia Pacific, to provide them with insights and actions for improving the delivery of care. Our proprietary tools and frameworks, coupled with deep industry experience, uncover insights around staff and workforce engagement, patient experience, safety culture, and governance, risk and compliance.

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