



Growing Influence of the Online Healthcare Consumer

Findings from the 2018 Healthcare Consumer Insight & Digital Engagement Survey

binaryfountain

Consumers today continue to be highly engaged in evaluating products and services online. They're sharing more and more information about their daily experiences with various online communities and making purchasing decisions on everything from restaurants to hotels and home appliances based on online reviews.

The same holds true for the healthcare consumer.

In our second annual "Healthcare Consumer Insight & Digital Engagement Survey," we at Binary Fountain sought to take a deeper dive and get answers to: How likely are they to share their healthcare experiences online? How much do they rely on ratings and reviews? What factors matter most when selecting a provider? And what are their biggest pain points when it comes to the patient experience?

The findings published in this eBook uncover interesting answers to these questions plus some telling insights on millennials. We hope you find it both informative and valuable. If you have questions, you can reach us at marketing@binaryfountain.com.





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Americans Are More Comfortable Sharing Their Healthcare Experiences

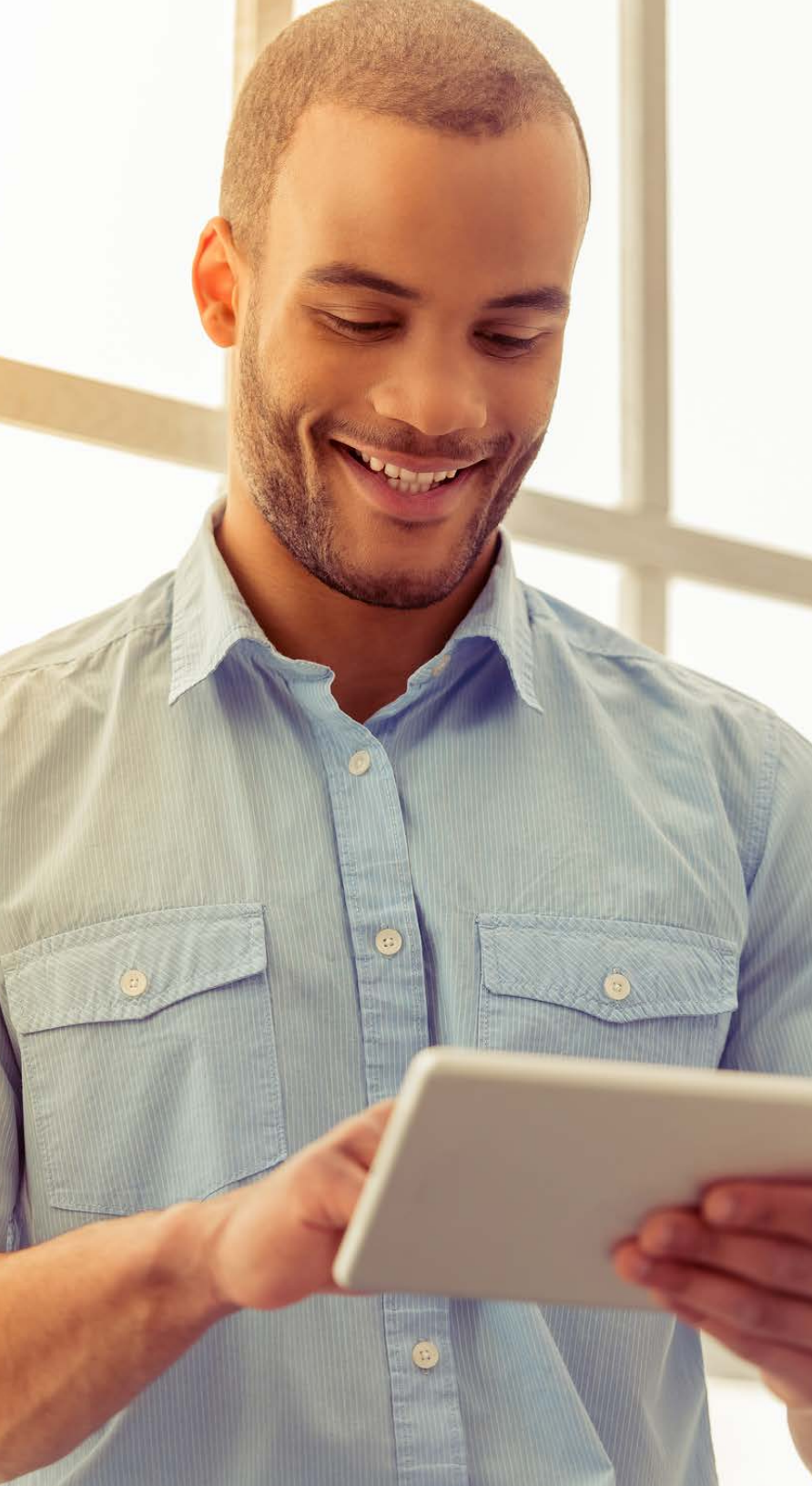
One of the most important findings of the Healthcare Consumer Insight & Digital Engagement survey was this: More Americans than ever before are comfortable sharing their healthcare experiences with others. In

particular, millennial consumers between the ages of 18 and 34 are the most active on social networks and are the most inclined to share their healthcare experiences online.

- **51% of Americans** say they shared their personal healthcare experiences via social media and online ratings and review sites. This is a significant increase from our 2017 survey, which showed only 31%. This should be an eye-opener for physicians and medical providers, as it shows a dramatic change that can affect how they look at online reviews.
- **70% of millennials** age 18 to 34 report they have shared their experiences about a physician or hospital online. We will cover more about millennials later in this ebook.

As you can see, a growing percentage of Americans are taking an active role in sharing their experiences. Where are they sharing this information, though?





Our survey found:

- For patients age 24 to 54, the most common online platform to share healthcare experiences was Facebook.
- In 2017, patients reported their preferred platform for sharing healthcare experiences was Twitter, but that changed with the new survey. This year's survey found that younger millennials, between the ages of 18 and 24, prefer to share their experience through Google.

From the information above, it becomes apparent that physicians and healthcare providers must keep a careful eye on a wide range of online platforms, including social media sites like Facebook and Twitter, and a growing number of healthcare-specific sites, such as Vitals and Healthgrades. This brings us to another topic: our growing reliance on online ratings and review sites. We will explore this in the next chapter.



Growing Reliance on Online Ratings and Review Sites

Amazon is credited with starting the online review sea change, but online reviews have since grown to encompass virtually all parts of the Internet, from retail to healthcare. Facebook offers users the chance to recommend – or not recommend – businesses they interact with and leave comments on their experiences.

Entire websites exist for the sole purpose of helping consumers determine whether a particular business is worth their time and money. Now, online ratings and reviews are impacting doctors and healthcare providers – and it is growing.



The Rise of Online Reviews and Rating Sites

Traditionally, if you wanted to buy a new car or hire a plumber, the best way to get recommendations would be to ask your family and friends. You might even broaden your circle to include coworkers, bosses, and acquaintances. We still do that today, but online reviews have largely become the new word of mouth when it comes to recommendations.

How do online rating and review sites work in this scenario? They provide a “pull” to attract customers, rather than the “push” of traditional, invasive marketing methods, such as radio spots and print ads. Consumers actually go looking for information about brands, products, and services. They are engaged in the process.

According to [PricewaterhouseCoopers](#), “Although trust in the brand plays a strong role in determining where consumers shop, they rely heavily on other people's opinions to decide what to buy.”





How does this apply to healthcare, though? This is where things get a little bit trickier. Most Americans only recently began using online ratings and reviews to help make healthcare decision, so things are still emerging. But they are making an impact on healthcare providers.

“What matters is that patient comments are out there, so no matter how outdated the comment is or how irrelevant it appears, patients are still making decisions based on it,” HCA Healthcare, Elizabeth Davis, the manager of online reputation management, said in an [interview](#) with *PatientEngagementHIT.com*. “Comments are something that we can’t overlook even if we want to say ‘oh, well, this doesn’t match the actual perception in my practice.’ The question is, how do you get to a point where it does reflect the experience of the patient in your office?”

Findings from our 2018 Survey

Our 2018 survey results indicated that healthcare consumers continue to depend on online ratings and reviews when finding a provider. This reflects the impact of online ratings and review sites and the continuing rise of healthcare consumerism.

Highlights included:

- **95% of our survey respondents** told us that they find online ratings and reviews “somewhat” to “very” reliable. This is the same result as our 2017 study indicating that consumers continue to give weight to these patient voices.
- **70% of Americans** say that online ratings and review sites have influenced their decision when selecting a physician.
- In fact, when referred by another doctor, **41% of consumers** still search online ratings and reviews. They are unwilling to make an appointment based on a doctor’s word alone, preferring to seek out supporting information from other consumers to determine what the experience might be like, the professionalism of the recommended doctor, and other factors.





So where are these consumers finding reviews on which to base their decision about a new healthcare provider? It turns out that many of them are visiting the provider's own website.

Survey respondents tell us:

- Around **34% of consumers** will visit a physician/hospital's website to find reviews.
- Google comes in second with **29% of respondents**.
- WebMD comes in third with **18%**.
- Healthgrades slides into fourth place with **15%**.
- Facebook rates fifth with **12%**.



Healthcare providers have their work cut out for them in terms of monitoring the conversation surrounding their brands. The five websites listed must be monitored and managed regularly, plus keep an eye on other sites like Vitals and RateMDs as well. Expect other sites to spring into existence as more consumers begin researching ratings and reviews for healthcare providers.

These online ratings and reviews are influenced by patients' experiences with your providers, staff and facility. We will discuss experience-related expectations in the next chapter.



Expectations Remain High for Patient Experience

Patient experience – it's becoming a strategic imperative among healthcare providers, whether you are at a private practice, multi-professional clinic, or hospital.

Patients today have high expectations for customer service and bedside manner. In fact, consumers expect great customer service from healthcare as they do from non-healthcare industries, according to a [Mckinsey & Company article](#). Those expectations influence the overall patient experience. Failure to meet their expectations diminishes the experience in your patient's eyes. Exceeding those expectations improves their overall experience.

This brings up many questions that must be answered since you cannot hope to exceed, or even meet, expectations if you are unsure what matters to them in the first place. Within this chapter, we will highlight the results of our survey.

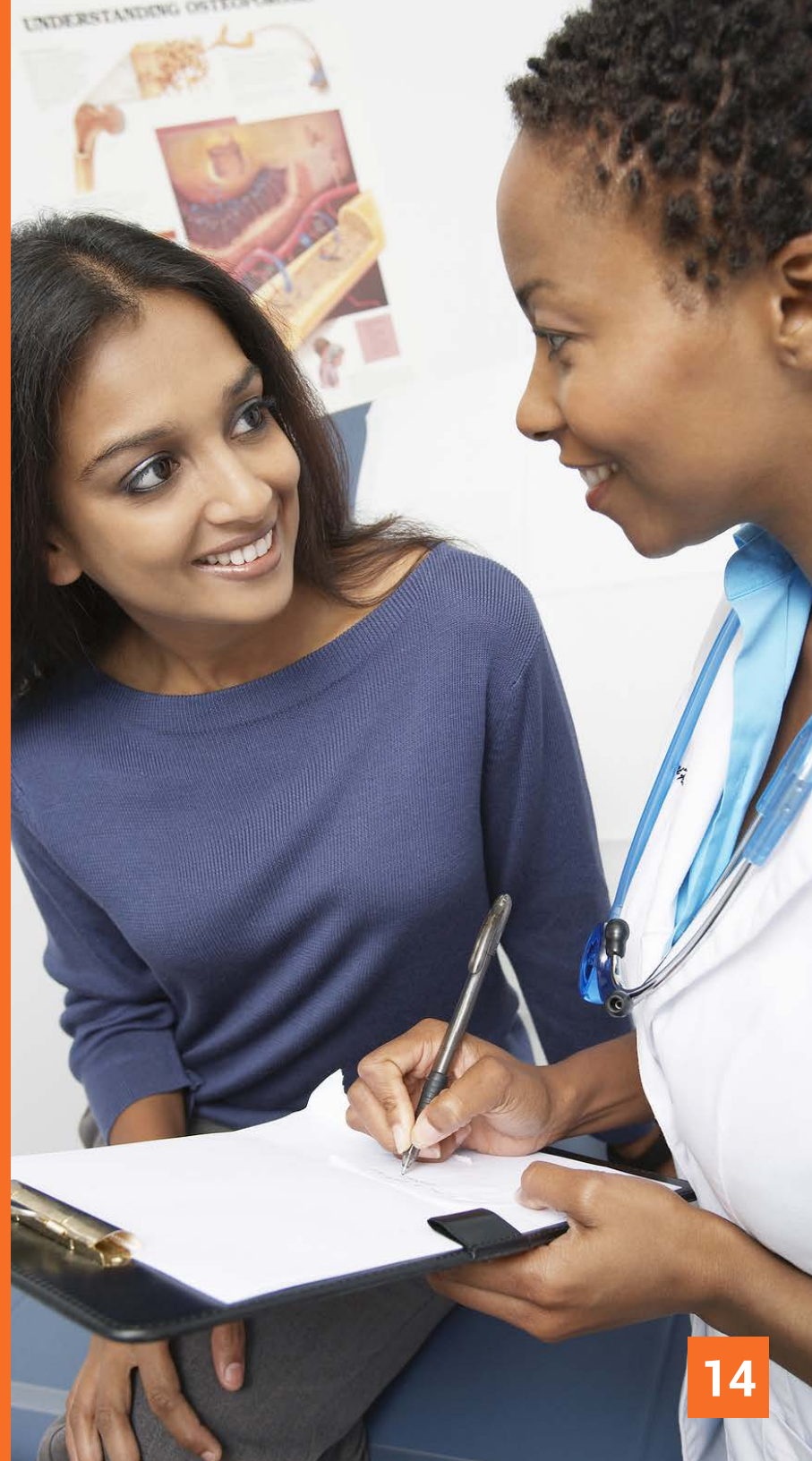
What Is Patient Experience?

Before we dive into the survey results, we need to first define patient experience. The Agency for Healthcare Research and Quality (AHRQ), part of the US Department of Health & Human Services and the lead Federal agency charged with improving the safety and quality of America's health care system, defines patients experience as follows:

"Patient experience encompasses the range of interactions that patients have with the healthcare system, including their care from health plans, and from doctors, nurses, and staff in hospitals, physician practices, and other healthcare facilities. As an integral component of healthcare quality, patient experience includes several aspects of healthcare delivery that patients value highly when they seek and receive care, such as getting timely appointments, easy access to information, and good communication with healthcare providers."

The Beryl Institute, a global community of practices dedicated to improving the patient experience, defines it as, "the sum of all interactions, shaped by an organization's culture, that influence patient perceptions across the continuum of care."

Press Ganey, pioneers of the healthcare performance improvement movement, simply defines it as "safe, high quality, patient-centered care."



Factors that matter most to patients when rating or evaluating a physician

With patient experience becoming such a priority among healthcare providers, we want to highlight the results we obtained. Through multiple-choice questions on our survey, we examined factors that **matter most to patients when rating or evaluating a physician**. Those are as follows:

- Consistent with 2017 survey results, **48% of Americans** across all age groups reported “a friendly and caring attitude” as the most important factor in 2018.
- **47% of consumers** reported “ability to answer all my questions.”
- **45% of consumers** reported “thoroughness of the examination.”
- **52% of female respondents** indicated “a friendly and caring attitude.”
- **45% of men** reported “the ability to answer all your questions.”





From these results, we can extrapolate a few things. First, the most important factor in any physician rating or review is “a friendly and caring attitude.” Put more simply, a good bedside manner is vital. While this is the most important overall factor, it is the single most important factor for the majority of female patients.

Second, we find that knowledgeability plays a key role, particularly for male patients. Finally, we find that patients take the perceived thoroughness of their evaluation very seriously. If they feel they are being ignored, or their concerns are being glossed over, it negatively impacts their experience -- and the online review of the physician.



Patients Are Losing Patience in Waiting Rooms

Ask the average American patient what they'd like to avoid when visiting a doctor's office, many will say the long wait. Our study confirms this. It was the most frustrating aspect about visiting the doctor.

Our Study Results

- **43% of consumers** across all age groups selected "wait time" as the most frustrating part of visiting the doctor.
- **10% of consumers** selected "cost and payment" as the most frustrating part of a healthcare visit.
- **10% of consumers** selected "awaiting exam results" as their most frustrating experience.
- **9% of consumers** reported that "scheduling" was what they found most frustrating.

This wait time finding was backed up by numerous other studies and articles.

- “Doctor Wait Times Soar 30% in Major US Cities” proclaims a headline in Forbes.
- “Most Stressful Part of a Doctor's Visit: The Wait, Says Survey” is another headline, this one from CNBC.

The American Journal of Managed Care published a study which found that longer wait times negatively impacted every aspect of the overall experience, including confidence in the care provider and perceived quality of care.

Wait rooms are necessary, but the length of time a patient remains waiting to see the doctor should be minimized.

Appointment Booking Methods – Understanding Patient Preferences

Traditionally, you made an appointment with your healthcare provider in one of two ways – either in person, or by phone. Today, the telephone is still the preferred method, but new technologies are beginning to change things.

When asked how they have booked an appointment with their doctor (more than one choice allowed), 84% of Americans have booked an appointment by phone, 24% in person, 14% via doctor's website, 13% patient portal and 4% through third-party sites like ZocDoc and WebMD.

It's important to understand that different genders and generations have unique preferences when it comes to appointment booking, as well. Our survey found:

- **74% of men** are likely to book over the phone, in comparison to 89% of women.
- **25% of men** are likely to book an appointment via a website, compared to just 9% of women.
- **Millennials age 18 to 24** are the least likely demographic to book an appointment by phone.

What do these survey results mean for healthcare professionals? 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.





Emerging Influence of Millennials

It is important to gain some perspective on the size of the millennial market in order to understand their emerging impact on healthcare consumerism.

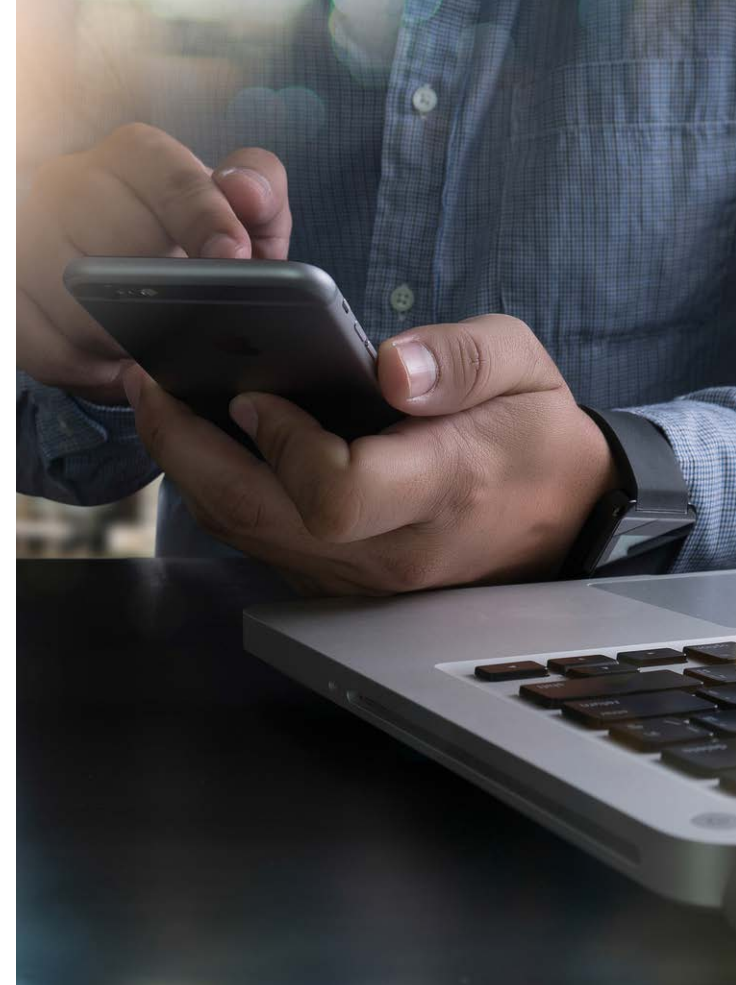
- The millennial generation encompasses everyone born between 1981 and 1997. 1980-2000 is an alternative date range. (Note that not all authorities share the same criteria, which creates some discrepancies in statistics.)
- CNN noted 83.1 million millennials in 2014 and 75.4 million baby boomers.
- Pew Research found that millennials made up the single largest generation in the US workforce, with 56 million millennials employed in 2017. In comparison, only 53 million Generation Xers were counted, and only 41 million baby boomers.

There can be no argument that millennials are a growing force in the US. As they continue to age, they will have a greater impact on the healthcare sector as well. However, you do not need to look to the future to see how millennials are changing things.

Millennials and Review Sites: An Active Relationship

As we have established, consumers in general are actively involved with review and rating sites, whether they are rating a product they love on Amazon or writing a scathing review of a restaurant on Yelp. However, while this trend applies across all demographics in the US, it is particularly prevalent with millennials. **Here are findings from our annual survey on millennials:**

- **97% of millennials** find online physician ratings and reviews reliable
- As mentioned earlier, **70% of millennials** were influenced by online rating and review sites when choosing a physician
- **51% have checked the ratings** and reviews of a doctor/specialist after receiving a referral from a doctor
- **Google, hospital/clinic's website, Facebook and Healthgrades** are the most popular websites/platforms used to help choose a doctor
- **68% of younger healthcare consumers** between the ages of 18 and 24 say that they have shared their healthcare experience online. This is an increase of 33% over the results of our 2017 survey.



- Forbes points out that millennials are actually highly focused on making a smart decision by reading reviews. "Above all else, the younger generation appreciates a world where knowledge reigns, and when authoritative news sources fail to keep up, reviews are the next best thing." Forbes reports also reports that millennials are "much more skeptical of big brands and corporations than previous generations" and use reviews as a way to find brands they feel they can trust. The same article from Forbes points out that, "As a whole, millennials are more likely to trust their friends and networks about a product claim than the actual brand."
- Entrepreneur reports that millennials are "searching for authentic, local experiences with brands that share their values, encourage social sharing and listen to their customers," and this is generally proven by reviews and ratings generated by other people (not the brand).



Managing Your Online Reputation

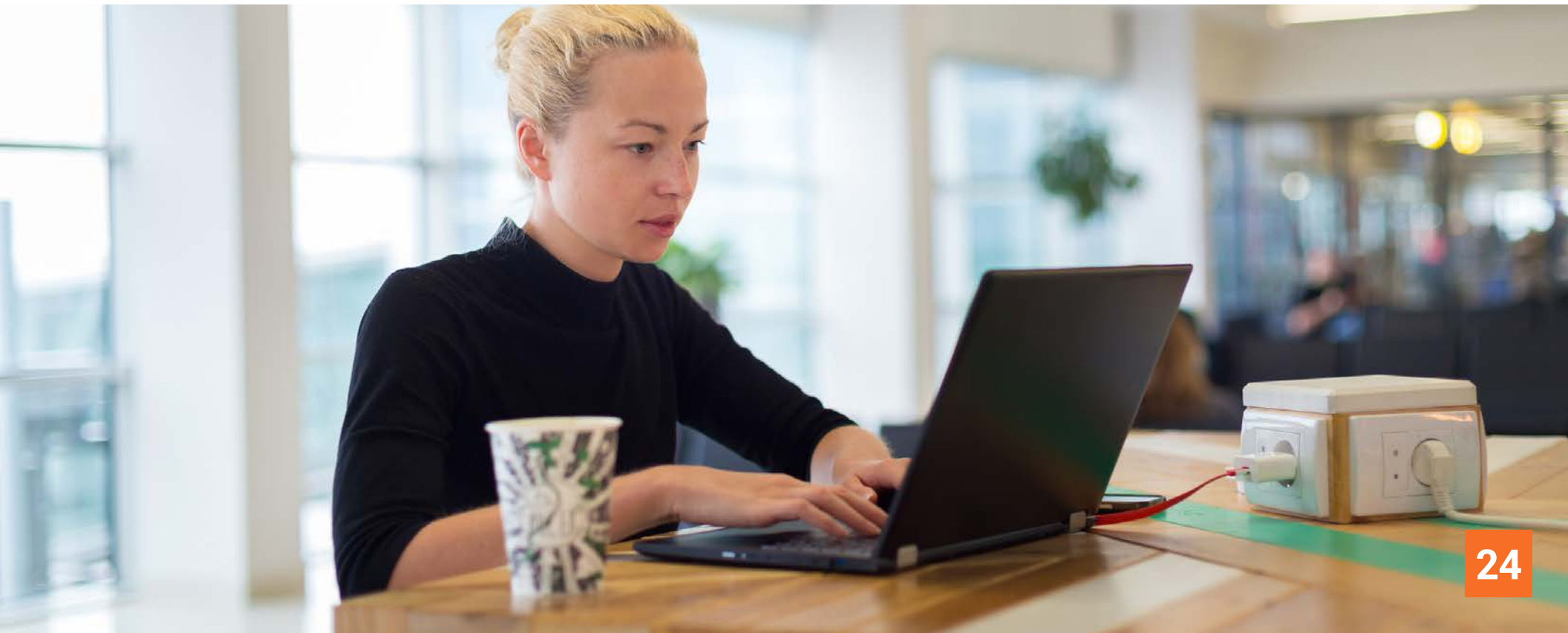
While making vital improvements to your hospital or practice based on patient feedback is critical, it is just as important that you monitor and manage the online conversation surrounding your practice or hospital. Your online reputation is an essential element of success – and as more and more consumers begin using the Internet to compare doctors and specialists, it will become even more important. So, what should you do?



Starting from Scratch? Claim Your Physician and Location Listings

The first thing you need to do is to claim your online listings for your locations and physicians on third-party websites. While Facebook requires that you create a page for your practice, you will most likely find that there is already an entry for it on most other platforms including Google and medical-specific sites like Healthgrades. Run a search on your practice, plus “reviews” through Google, and you will be presented with a list of sites that have your practice listed, as well as reviews on it.

You will need to visit each of those sites and go through their proprietary claiming procedure. This is the process that proves you are either the owner of the facility or that you have the authority to make management decisions regarding it. You will also find that the process varies from one platform to another. You may need to make a phone call for one, while email will work for another, and texting on your smartphone might be required for a third.



Manage the Conversation Surrounding Your Brands

Once you have claimed your listings, you can start efficiently managing online reviews. Think of each of your physicians and locations as having their own brand. You need to check out the conversation surrounding them. What are the trends in ratings and sentiment? Are your reviewers mostly pleased with their patient experience, or do they have complaints? There are a few things to do here:

First, you should carefully manage any negative review. What went wrong? Where was the breakdown? What could have been done to prevent the patient from having a negative experience in the first place?

Contrary to what some might believe, most patients do not complain for the sake of complaining. They feel that they have a legitimate cause for complaint. Figure out what went wrong and what needs to happen in order to fix it.

You need to own the problem. You need to reply to the patient's review (most platforms allow owners/administrators to do this, but not all). Apologize for their less-than-ideal experience.

Do not attempt to make excuses or to cast blame elsewhere. Own it. Apologize for it. Thank them for their feedback. Let them know you want to resolve the issue and take the conversation with them offline. Work with them and staff to resolve the problem.

In many cases, responding professionally and compassionately to reviewers will prevent the loss of that patient to another practice and it says that you care about your patients – and that goes a long way. It can also influence them to change their review. This has a profound ripple effect. It raises your overall reputation while making it more likely that new patients comparing providers will find you a favorable option.



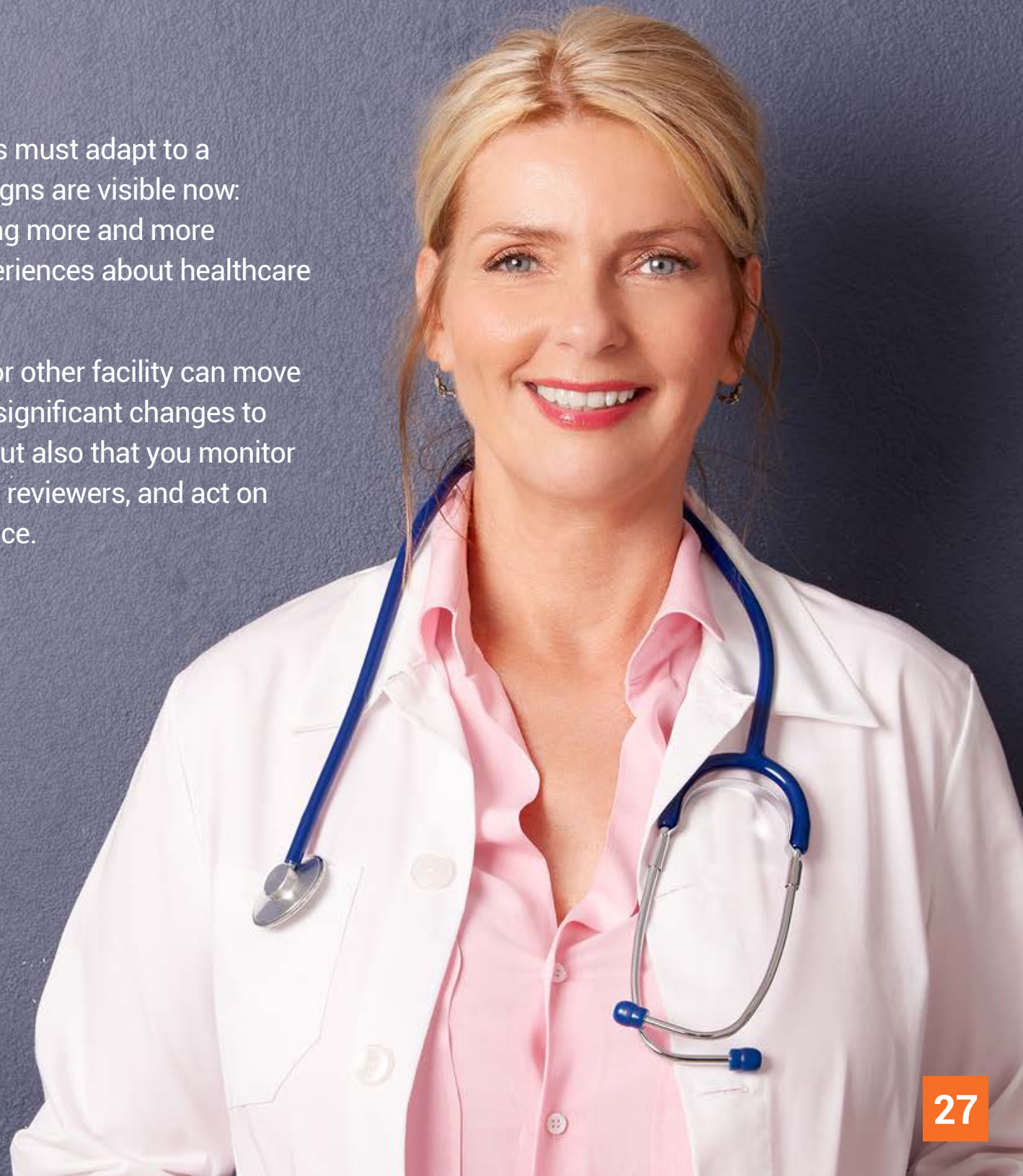
You need to constantly keep tabs on your online reputation. Don't forget to be active in replying to positive reviews. This can foster a strong sense of patient loyalty and community.

Finally, you need to keep your eyes open for new online rating and review sites that open over time. As Americans become ever-more comfortable sharing their healthcare experiences online, more websites may be built to help showcase those reviews and provide patients with the means to make informed, savvy decisions regarding their healthcare.

Conclusion

Ultimately, healthcare professionals must adapt to a changing patient landscape. The signs are visible now: healthcare consumers are becoming more and more comfortable with sharing their experiences about healthcare providers and facilities.

Ensuring that your practice, clinic, or other facility can move forward will require that you make significant changes to meet expectations and demands, but also that you monitor your online reputation, engage with reviewers, and act on issues that impact patient experience.



The Platform for Managing Online Reputation

As you might imagine, managing your online reputation, including replying to positive and negative reviews and using patient experience data to make improvements can be time consuming. Attempting to go it alone is a challenge, particularly for organizations with limited staff. Binary Fountain can provide a helping hand with its online reputation management platform built from the ground up specifically for healthcare providers.

We make it simple to monitor and manage the online conversation surrounding your practice or hospital, dial into your strengths and weaknesses, benchmark your services against competitors, engage with reviewers, and improve patient experience.

If you are ready to take control of your online reputation, we invite you to contact us to learn more.

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Call: 800.549.9552

1660 International Drive, Suite 225, McLean VA 22102

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



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 July 11-13, 2018. Feedback was obtained from more than 1,000 U.S. adults who have a physician.



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