


A CONSUMER SURVEY COMMISSIONED BY DOCTOR.COM

Customer Experience Trends in Healthcare 2018

In the modern patient journey, customer experience proves to be critical to business success. Here's why.



60% of consumers expect their healthcare digital experience to mirror that of retail.

Today's consumer wants every online interaction to be like Amazon. Amazon's convenience, trustworthy reviews, and comparison options have forever raised the bar for consumer-friendly online shopping, and other retailers have swiftly modeled after them.

This phenomenon doesn't stop with retail; **it's the consumer's new expectation of any digital experience. Including healthcare.** In fact, [data shows](#) that almost 60% of consumers expect their healthcare digital experience to mirror that of retail.

Today's patient has higher expectations and more control than ever when it comes to where they seek care. They have no qualms about shopping around for a healthcare provider and they demand an outstanding customer experience from the beginning.

What do we mean by Customer Experience (CX) in healthcare? Until the moment a consumer enters your examination room and becomes your patient, he or she goes through a series of actions and transactions which highly resemble any customer journey—researching and evaluating your staff and services; engaging your office to get more information; taking action to schedule

82% of people believe that the healthcare industry should consistently meet or exceed their expectations as a consumer, compared to just 46% in retail.

— NRC SURVEY 2016

an appointment; determining payment and insurance options. Today, much of this journey happens through digital channels, and the nature of these interactions can dictate whether a consumer becomes your patient. A broken, frustrating or inconvenient experience at any of these touchpoints could lead your patient to a competitor's practice.

If your focus hasn't yet broadened to include a Customer Experience (CX) mindset, **you're already behind.** While delivering an excellent Patient Experience (PX) is paramount for any healthcare organization, focusing on PX alone is an outdated way of conceptualizing the modern patient journey.

The new customer journey begins and continues online.

And not just your website. Your online presence spans across directories, consumer sites, reviews on various third-party websites, social media, and messaging not to mention a growing number of consumer destinations where patients are beginning their search for care.



Word of mouth is happening online, with referrals being almost always complemented and in some cases, displaced by online research. In fact, in 2016, the use of online ratings sites surpassed word of mouth referrals for the first time (PRC National Consumer Report 2016). **To build trust and loyalty with a patient, healthcare organizations and providers need to be in control of their omnichannel presence.**

Patients have spoken.
Your online presence is more critical than ever in the care-seeking journey.

We surveyed over 1,000 patients in 2018 to learn more about their evolving needs and preferences. **Our findings provide a framework for the new customer journey in healthcare:**

- *Patients depend on the web to find a provider, and a healthcare professional's digital presence impacts a patient's decision at every step of their journey.*
- *To be truly effective, referrals must be accompanied by a strong online presence. Over 80% of patients research providers even with a referral—and that goes for every age group, not just younger patients.*
- *Patients won't trust or return to a healthcare organization if they don't enjoy a consistent customer experience throughout their journey. This means that organizations need to ensure a seamless online booking process, appointment reminders and follow-up communications. Good care is no longer enough; it's considered table stakes and a component of the greater experience.*

Just as leading healthcare organizations strive to deliver the best patient care by focusing on engagement, education and prevention, so too should organizations proactively approach the customer journey in healthcare, equipped with compelling consumer data and digital mindset.

Patients have spoken. Your online presence is more critical than ever in the care-seeking journey.

All the best,



Andrei Zimiles

CEO & Co-Founder, Doctor.com

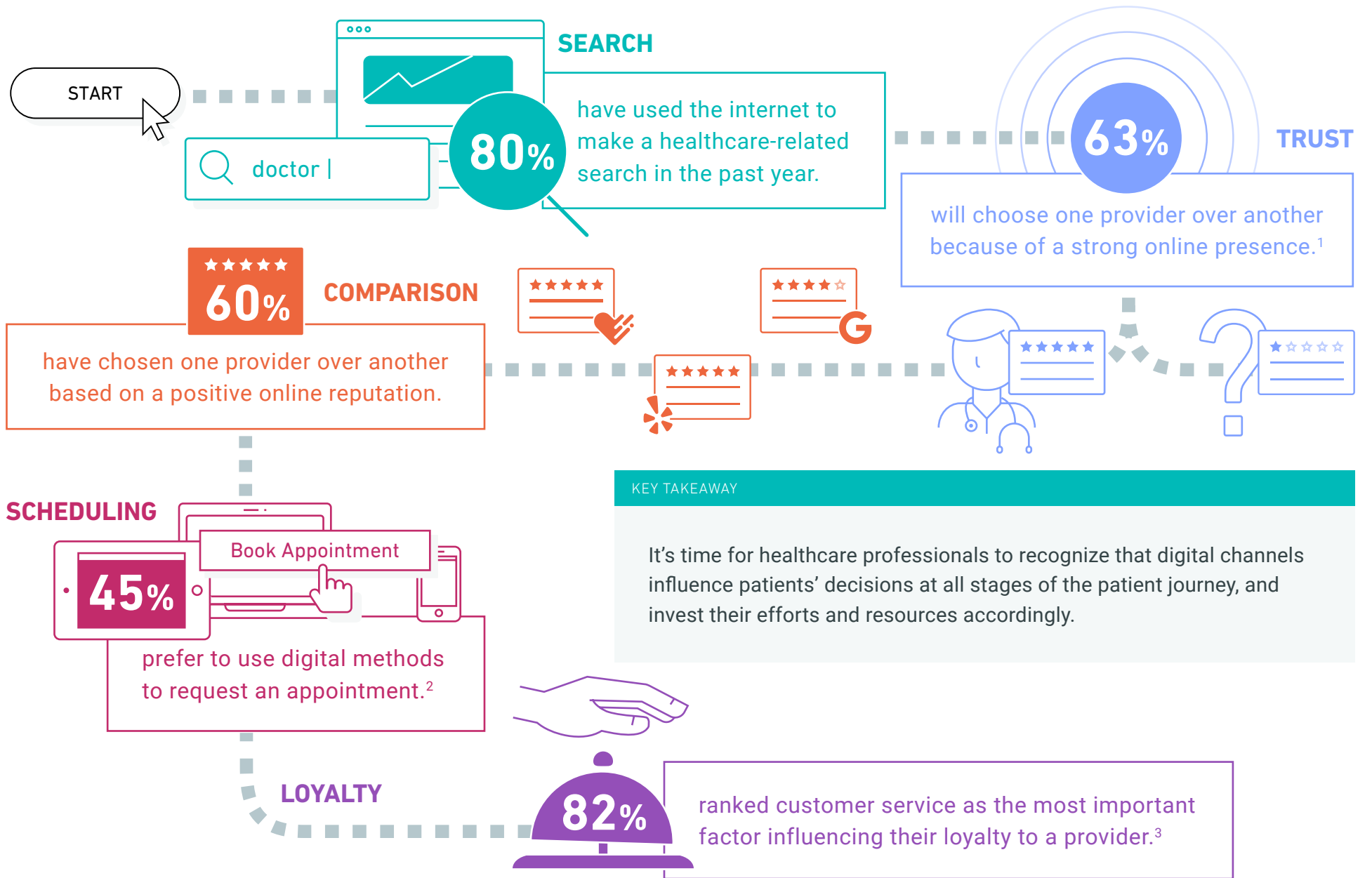


80% of consumers have used the internet to make a healthcare-related search in the past year.

SECTION 01

The Patient Journey Begins Online

The provider-patient relationship begins well before the two meet face to face. In fact, patients will start by searching for providers online. Approximately 80% of survey respondents have used the internet to make a **healthcare-related search** in the past year. 56% prefer to search for a provider using a laptop or PC while 2 out of 5 prefer using a mobile device or tablet. From there, the customer journey is largely influenced by the digital realm. And **it's not just the younger generations**—76% of respondents over 60 have made a healthcare-related search online in the past year.



¹ strong online presence: the availability of relevant, accurate and compelling information online

² digital methods: online scheduling via a website, mobile app or email

³ under the assumption that the patient is receiving quality care

81% of patients will read reviews about a provider *even after they've been referred.*

SECTION 02

Your Online Reputation Matters, Even if You Have Strong Referrals

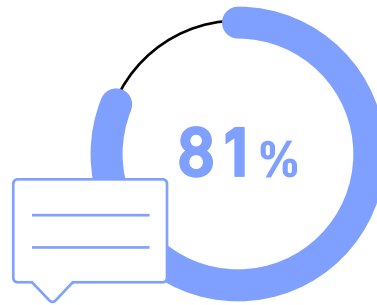
Word of mouth **referrals are still the most relied-upon method** for finding a new healthcare provider. 55% of survey respondents most often rely on a referral from an acquaintance or existing healthcare provider, while 18% rely on a referral from an insurance provider or benefit manager.



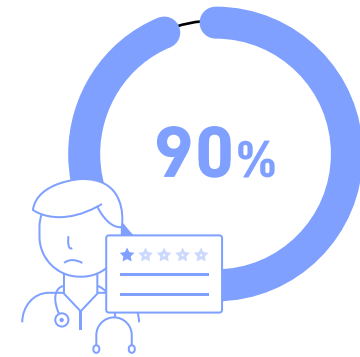
But, referrals are only a starting point. If you have a poor online presence and a lackluster reputation, you risk losing patients to a competitor from the get go. You also fail to capitalize on the good will of those that referred a patient to you in the first place.

Hence, providers must be aware of **referral loss or leakage.**

For general practitioners, dentists, OB-GYNs, pain management providers and dermatologists, it's especially critical to have an online reputation strategy, as respondents ranked these specialties as the ones for which reviews are most important.



will **read reviews about a referred provider** occasionally, frequently, or always, *even after they've been referred.*



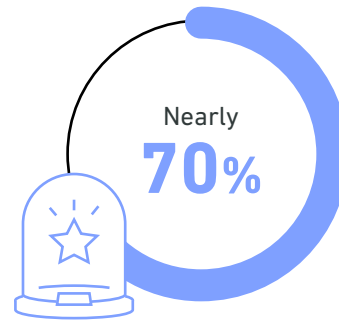
will frequently or always change their mind about a referral due to the provider's **poor or weak online reputation** (a rating of less than three out of five stars).



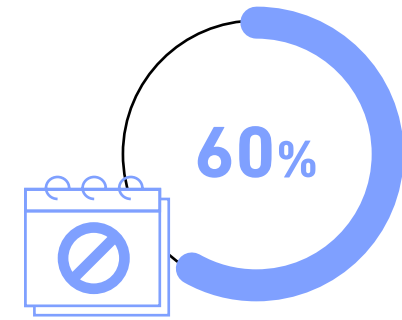
will occasionally, frequently or always **change their mind** about a provider with a rating of less than 3 stars.

74% of patients will choose one provider over another when searching for healthcare online because of *negative reviews.*

Keep in mind, not all reviews are created equal in the eyes of today's discerning patient.



consider **quality of reviews** to be most important.



would **not book** with a provider with **poor quality reviews**.



KEY TAKEAWAY

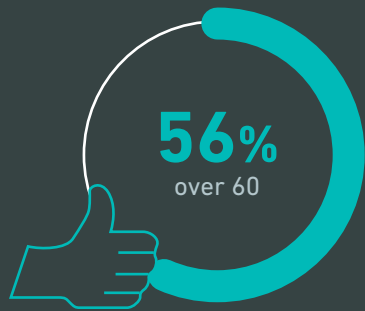
A healthcare professional's online presence is the first impression and sometimes the last impression that potential patients form of them. To reduce referral leakage, ensure a solid and compelling web presence on the web, from listings to reputation.

The 60+ demographic is going digital, too. This isn't just a millennial trend—it's an *everyone* trend.





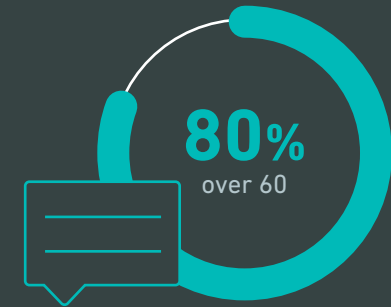
have used the internet to make a healthcare related search in the last year.



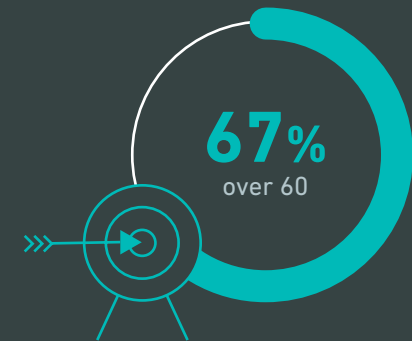
say that a positive online reputation has impacted their decision to choose one healthcare provider over another.



will occasionally, frequently or always change their mind about seeing a referred healthcare provider with a rating of less than 3 stars online.



will occasionally, frequently, or always read online reviews about a referred provider.



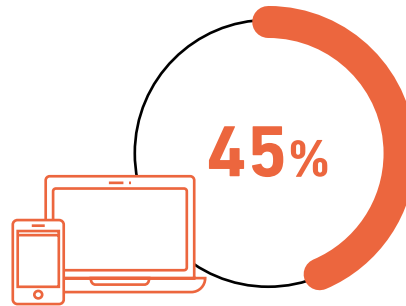
agree that availability of relevant and accurate information online has impacted their decision to seek one healthcare provider over another.

Nearly half of patients prefer digital methods to request an appointment.

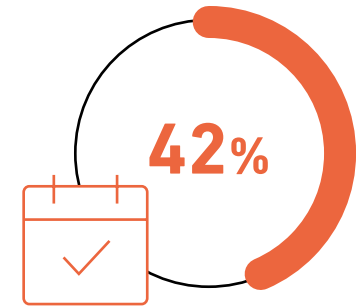
SECTION 03

Digital Tools Facilitate the “Last Mile” of the Journey

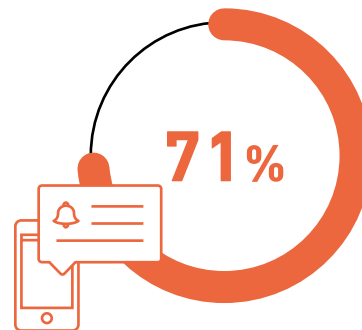
The customer journey in healthcare has traditionally been a fragmented and frustrating experience. Hours quickly accumulate between calling insurance providers to find an in-network provider, scheduling an appointment, sitting in a waiting room and perhaps navigating to a pharmacy and waiting there, too—not to mention follow-up appointments. Likely due to this frustrating time commitment, the ease of online booking has become a prominent aspect of a patient’s decision to select a provider.



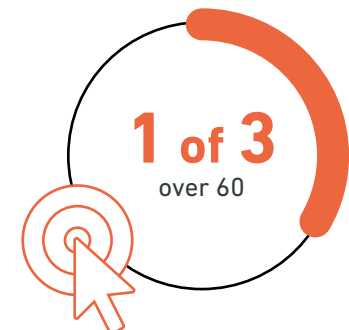
prefer to use **digital methods** to request an appointment (i.e. non-voice interaction including online tools, mobile apps or email).



will **choose** a healthcare provider because of the ability to use online scheduling.



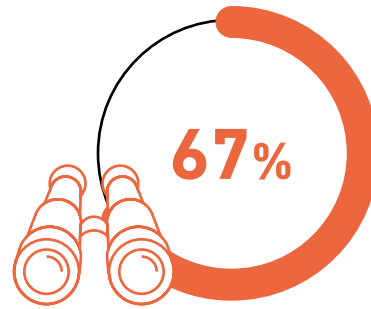
prefer **appointment reminders** via digital means (i.e. email or text)—a critical way to combat no shows and last-minute cancellations.



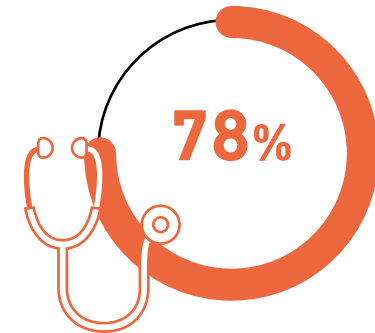
prefer to make an appointment online via a website, app or email.



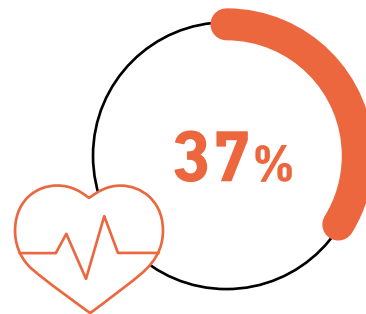
Patients seek care with a provider at a physician practice 82% more often than at a hospital.



have sought healthcare services at a **physician practice**.



have sought care at a **non-hospital** (i.e. physician practice, boutique clinic, community/mobile clinic, or urgent care clinic).



have sought care from **hospitals and urgent care clinics**, indicating an opportunity to double down on preventative care programs.

KEY TAKEAWAY

Digital tools provide a seamless customer experience through the “last mile” of the care-seeking journey and can ensure a higher rate of appointment capture and attendance.

86% of patients consider quality customer service to be a key part of their healthcare experience.

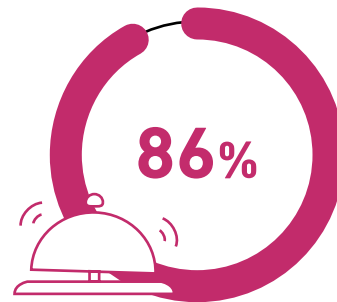
SECTION 04

Good CX is Vital for Securing Lasting Patient Trust

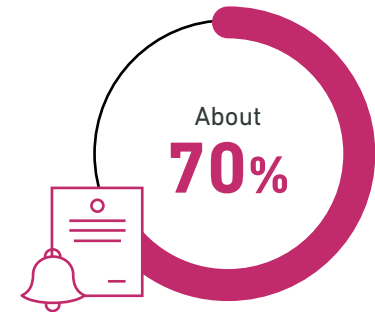
In today's world, trust and loyalty are hard to achieve and easy to lose. With rising deductibles, out-of-pocket expenses and costly insurance premiums, patients put in a great deal of time and energy to choose and see a

provider and demand high-quality care. According to a study done by the Associated Press, the way patients describe quality care is very different from providers. By and large, patients describe quality care with words most healthcare professionals would consider to be part of the patient or customer experience. In Doctor.com's research, CX is considered as important as quality outcomes, which can be a shocking revelation to many providers.

How does CX impact winning a 5-star review, you ask?

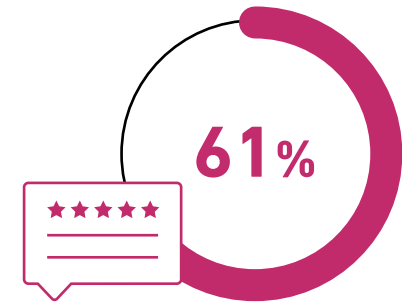


agree that if they are receiving quality care, **good CX is the most important element** to earning a 5-star review.

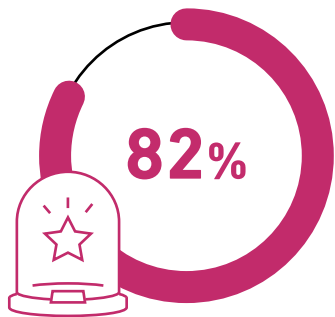


consider good **patient communication and engagement**, such as follow-up or annual check-up reminders, to be key to a 5-star experience.

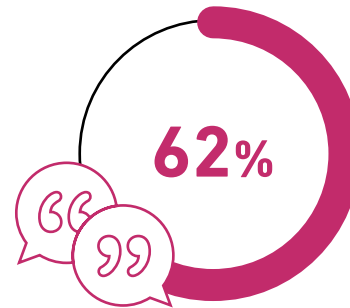
Good healthcare professionals know that the journey isn't over when the appointment ends. Continuous engagement is key to enabling a lasting patient relationship.



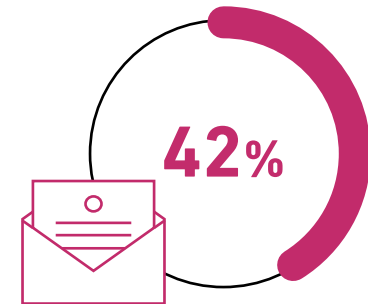
consider **ease of appointment booking** to be a major factor in 5-star-worthy healthcare providers.



agree that when it comes to **patient loyalty**, quality customer service ranks as the most important factor, assuming quality care and treatment is received.



say **good communication and continuous engagement** influence their level of loyalty.



report that **text and email appointment reminders** also influence their loyalty and likelihood of returning to a provider multiple times.



Consumers have higher expectations for healthcare, perhaps more so than in any other industry.



reported that waiting room amenities influence their loyalty to their provider.

This is the definitive proof that CX is taking over. It's no longer just about good patient care, but instead a focus on the entire customer journey—from pre- to post-care.

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

Doctor.com helps healthcare organizations deliver a better customer experience at every step of the patient journey. Thousands of healthcare organizations of all sizes have been empowered by the Doctor.com platform to enhance their digital presence and credibility, increase patient trust, and grow their business.

KEY TAKEAWAY

To meet patients' needs holistically, providers should continue to ensure the best possible outcomes while also recognizing every patient has consumer needs they consider equally important. (You can't get good outcomes if the patient leaves you). In order to meet these needs at scale with limited time, software platforms become a critical foundation to running a healthcare organization of any size.

The future of Customer Experience is all about digital advancements.

SECTION 05

Take it from the Experts

The focus on digital doesn't end here. Healthcare professionals of today will rely on technology to enhance a more personal, efficient customer experience.

KEY TAKEAWAY

The future of healthcare is about integrating technology and effectively managing CX. Patients demand it, and their health depends on it.

“

Siloed data prevents healthcare organizations from delivering care efficiently, while obstructing the care-seeking journey for patients. Looking to the future, innovation should be focused on holistic and robust solutions that empower healthcare organizations to provide a stronger and more effective end-to-end customer journey.

— ANDREI ZIMILES, CEO AND CO-FOUNDER OF DOCTOR.COM

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Truly winning in any strategy around consumerism is about effectively managing data. From provider and location biographical data to patient satisfaction and online reputation information, having a single platform to empower the myriad channels and processes in which this data is used will be a defining trait of the most powerful healthcare brands of the future. This will allow us to fully empower patients, connecting them with the right doctor while actually making healthcare better with insights previously hidden inside data silos.

— NOEL COLEMAN, PRESIDENT OF DOCTOR.COM ENTERPRISE

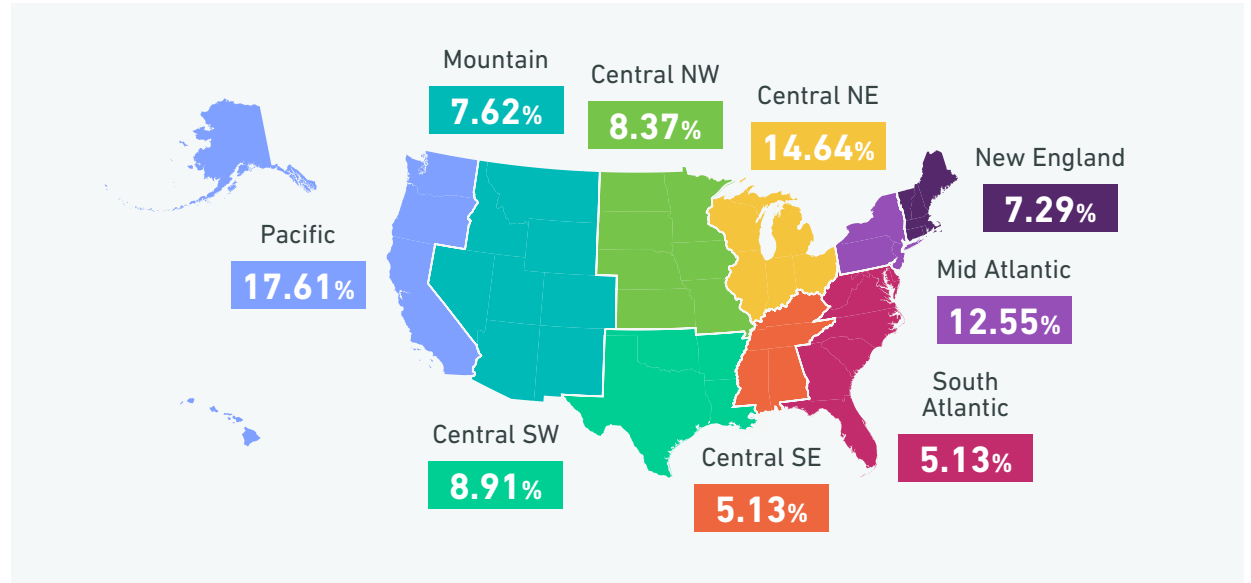
CLOSING

About the Survey

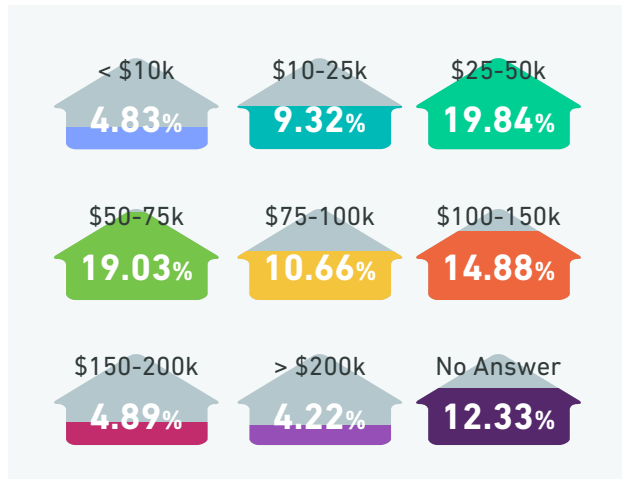
Survey methodology: "Customer Experience Trends in Healthcare 2018" was produced by Doctor.com. Research was conducted through SurveyMonkey Audience and commissioned by Doctor.com during February of 2018.

This report represents the findings from 1,718 respondents who represent the U.S. adult census demographic of regions, incomes, and genders, from age 18 to 65+.

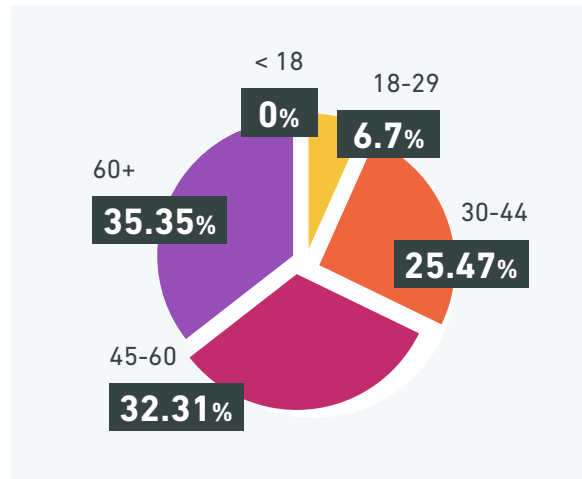
REGION DATA



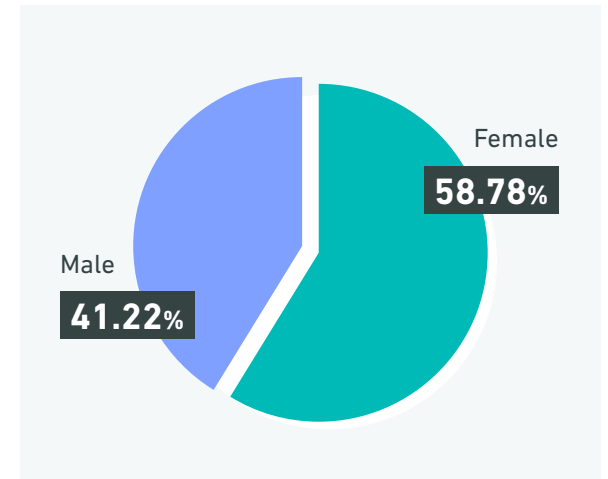
HOUSEHOLD INCOME



AGE DATA



GENDER DATA





WHO WE ARE

About Doctor.com

Doctor.com is the only complete platform built to help healthcare organizations deliver a better customer experience at every step of the patient journey. The company's industry-leading technology seamlessly integrates provider data warehousing, web-wide listings management, reputation insights, universal online scheduling, and patient communications. All of these services are enhanced by Doctor.com's 50+ integrations with the most prominent healthcare directories, search engines, social media platforms, and EHR/PM systems. As a result, thousands of healthcare organizations, including more than 200 of the country's leading hospitals and health systems and over 20,000 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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