

Consumerism: The Role of Patient Experience in Brand Management and Patient Acquisition

By gaining a deep understanding of what gets people talking about positive patient experiences, identifying opportunities to advance the conversation and disseminating key information, health care systems can align the mission of delivering safe, high-quality, patient-centered care with the business of acquiring and retaining consumers.

Executive Summary

Health care systems are spending millions of dollars annually on marketing campaigns designed to attract consumers to serve their long-term care needs. Yet traditional strategies, such as online and print advertising, billboards and mass mailings, do not reflect patients' perceptions of the safety, quality and experience of care, and it is these perspectives that exert the most powerful influence on consumer choice.

To harness that influence, providers should capitalize on the power of word-of-mouth marketing by viewing the patient experience as an essential part of their acquisition strategy. By gaining a deep understanding of what gets people talking about positive patient experiences, identifying opportunities to advance the conversation and disseminating key information, health care systems can naturally align the mission of delivering safe, high-quality, patient-centered care with the business of acquiring and retaining consumers.

Press Ganey researchers surveyed a nationwide sample of more than 1,000 household health care decision makers to understand the role that patient experience plays in consumer acquisition and brand awareness/management.

Key Findings:

- Patient experience is **five times more likely to influence brand loyalty** than other marketing strategies.
- Consumers are **more likely to turn to the Internet** than to talk to family and friends when researching a new physician.
- The majority of consumers research a physician on the Internet, **even after receiving a referral from a primary care provider**.
- Consumers specifically seek out and **are influenced by patient ratings and reviews**.
- Consumers **value positive and negative comments** for different reasons, and both influence consumer choice.

Introduction

The decision-making behavior of health care consumers is increasingly influenced by their retail and service experiences in which information and reviews—from family and friends and online—is sought after, valued and expected. In the same way, today's health care consumers consider their own previous care experiences combined with word-of-mouth recommendations from friends and family to make the best decision about where and from whom to receive care. And they have also begun to rely heavily on Internet searches, online reviews, social media posts and blogs.

The pervasive influence of digital channels on brand perception is urging hospitals and health systems to rethink their strategies for acquiring new patients and earning loyalty from existing ones.

Press Ganey researchers surveyed more than 1,000 adults responsible for household health care decisions to answer the following questions.

- **How does patient experience compare with traditional marketing strategies with respect to predicting brand loyalty?**
- **How frequently do patients research prospective new physicians and referrals online before scheduling an appointment, and when they do, what tools are they using and what are they looking for?**
- **Do patients look beyond the physician ratings and review the comments from other patients?**
- **Do positive or negative comments have more weight in the final decision?**

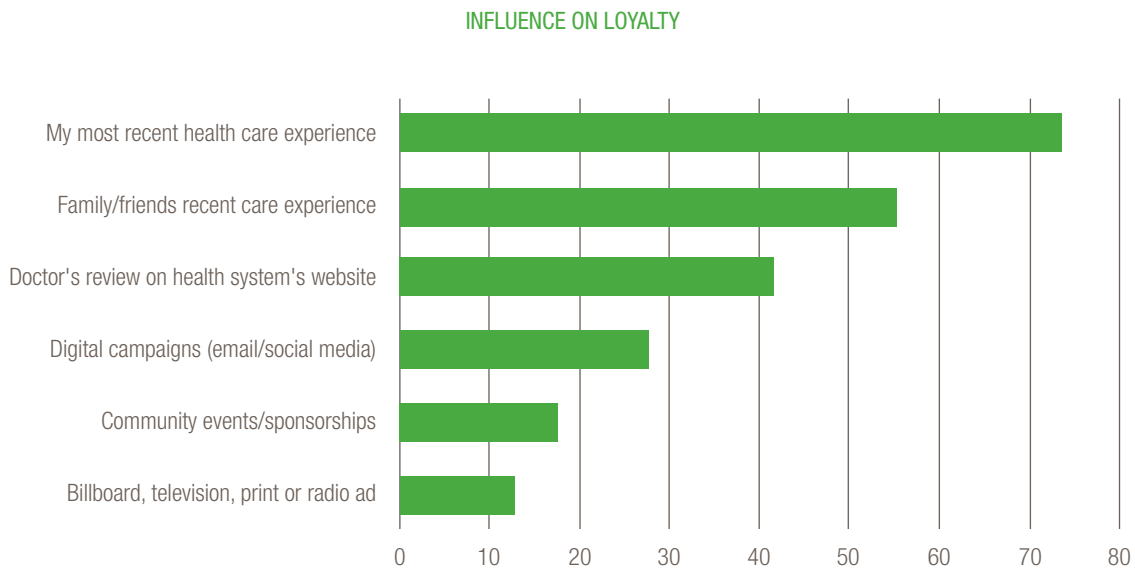
The findings provided six critical insights.

1. **Patient experience is more influential than other marketing strategies in predicting brand loyalty.**
2. **Consumers turn to the Internet before turning to family and friends.**
3. **Consumers value online patient ratings and reviews.**
4. **Consumers no longer blindly follow primary care referrals.**
5. **Consumers seek patient ratings and reviews when researching a physician.**
6. **Consumer choice is influenced by both positive and negative ratings and reviews.**

1. Patient Experience Is More Influential Than Other Marketing Strategies in Predicting Brand Loyalty

The data indicate that patient experience is five times more influential in predicting system loyalty than traditional brand promotion (Figure 1).

Figure 1



*% reporting very or extremely influential to the following "How much do each of these interactions with your health care organization influence your decision to continue to use them for care"

2. Consumers Value Online Patient Ratings and Reviews

When asked about the kind of information they are looking for when they research potential physicians, more than 80% of consumers indicated that they are primarily seeking insurance information, followed by more than 70% looking for patient ratings/reviews. In fact, learning about the experiences of other patients seems to be more important to consumers than the physician’s background (Figure 2).

Figure 2

WHAT TYPE OF INFORMATION WOULD YOU LOOK FOR ABOUT A NEW DOCTOR?

	% Yes
Insurance Information	81.8%
Patient ratings/review of the doctor	70.7%
Hospital/health system affiliations	67.3%
Doctor's education/training	59.4%
Location/parking information	43.4%

3. Consumers No Longer Blindly Follow Primary Care Referrals

Even when patients are referred to a specific physician for specialty care, they don’t pursue these referrals without researching the providers online (Figure 3). Before accepting the referral, 72% of consumers report being likely/very likely to look at the physician’s Web page and nearly 70% read online patient ratings/reviews. Nearly as many (68.5%) will type the physician’s name into a search engine, while relatively few (43.4%) research the physician on social media.

Figure 3

IF YOU RECEIVED A SPECIALIST REFERRAL, HOW LIKELY WOULD YOU BE TO DO ANY OF THE FOLLOWING?

	Very Unlikely	Unlikely	Neither Likely Nor Unlikely	Likely	Very Likely	Mean
Look at the doctor's website	4.2	5.8	17.9	41.8	30.3	72.1
Talk to friends/family about the doctor	3.8	7.6	20.8	42.6	25.2	69.5
Read online patient ratings/reviews of the doctor	4.2	7	22	40.5	26.3	69.4
Type the doctor's name into a search engine	6.5	8.7	17.7	38.5	28.6	68.5
Research the doctor on social media	23.8	21.1	23.7	20.6	10.8	43.4

4. Consumers Seek Patient Ratings and Reviews When Researching a Physician

As observed, online physician ratings and reviews play an important role in consumer decision making, patient loyalty and brand awareness. To understand consumer perceptions about the information these resources provide, researchers asked respondents to rate the perceived value of positive, negative and neutral physician ratings. Among respondents who reported looking at online reviews, more than 63% find both positive and negative reviews to be highly valuable (Figure 4).

Further, nearly 70% of these patients reported having previously selected a physician based on positive reviews or avoiding one based on negative reviews (Figure 5).

Figure 4

HOW VALUABLE ARE THE FOLLOWING TYPES OF ONLINE PATIENT RATINGS/REVIEWS OF DOCTORS?

	Not At All Valuable	Slightly Valuable	Somewhat Valuable	Very Valuable	Extremely Valuable	Mean
Positive reviews	1.6	9.4	23.8	41.0	24.3	69.3
Neutral reviews	8.4	14.7	44.2	22.3	10.4	52.9
Negative reviews	3.1	9.8	23.9	35.7	27.5	68.6

Figure 5

HAVE VIEWED ONLINE RATINGS/REVIEWS OF A DOCTOR
AFTER VIEWING ONLINE PATIENT RATINGS/REVIEWS OF DOCTORS, HAVE YOU EVER:

	% Yes
Selected a doctor based on positive reviews	68.8%
Avoided a doctor based on negative reviews	69.4%

5. Consumer Choice Is Influenced by Both Positive and Negative Ratings and Reviews

The data also indicate that consumers go beyond the physician ratings to review the patient comments, and that respondents value positive and negative comments for different reasons.

Impact of positive feedback

Positive feedback about a physician helps consumers select a provider or feel more comfortable with a decision that has already been made, as indicated by the following statements.

“I would be more comfortable going to a doctor who has a lot of favorable reviews, because everyone has different experiences. If many people agree on the quality of one doctor, this would give me a lot of confidence in choosing that one.”

“If I read a great review about a doctor in my network, I would be more likely to set up an appointment.”

“If [a doctor] has good ratings from a lot of people, I feel safer using that doctor.”

Impact of negative feedback

Consumers look to negative feedback to identify patterns that might keep them from selecting a provider or lead them to do more research to see if the patterns persist. The following statements describe how patients use negative reviews.

“If there are negative reviews, I would probably not consider that doctor without recommendations from other sources, such as a referral from a current doctor I trust.”

“If there are multiple bad reviews with credible complaints, I wouldn’t be visiting that doctor.”

“Reviews greatly influence which doctor I use. If I see the same complaint by numerous people, this usually means it’s the truth and I choose not to deal with that.”

Although no physician likes to be the subject of negative reviews, these findings should reassure physicians that a single negative comment—particularly if it is an outlier among favorable comments—is not going to keep patients from selecting that provider. The real opportunity is to focus on any emerging patterns from negative comments and to target those areas for improvement.¹

6. Consumers Turn to the Internet before Turning to Family and Friends

When faced with the prospect of seeing a new care provider, most consumers immediately begin doing their own research, including talking to friends and family about the doctor, looking at the doctor’s biography page on their organization’s website, reading online patient ratings and reviews, and typing the doctor’s name into a search engine.

Of these options, the majority of consumers surveyed look to the Internet first (Figure 6). More than 70% look to the physician’s Web page, read online reviews or “google” the physician. Notably, online research ranks higher than talking to family and friends about the physician and seeking referrals from health care providers. Relatively few consumers consider social media sites to be valuable sources of information that would influence their decisions.

Figure 6

WHAT IS THE LIKELIHOOD THAT YOU WOULD GATHER INFORMATION ABOUT A NEW DOCTOR IN THE FOLLOWING WAYS?

	Very Unlikely	Unlikely	Neither Likely Nor Unlikely	Likely	Very Likely	Mean
Look at the doctor's website	4.5	6.3	15.3	41.4	32.5	72.8
Read online patient ratings/reviews of the doctor	5.8	5.9	15.3	40.4	32.6	72.0
Type the doctor's name into a search engine	7.0	6.7	18.2	35.6	32.5	70.0
Talk to family/friends about the doctor	5.9	7.4	19.1	37.0	30.6	69.8
Seek referrals from health care providers	5.3	6.4	20.7	41.0	26.6	69.3
Research the doctor on social media	23.1	21.7	23.4	19.7	12.1	44.0

These findings confirm that consumers are looking to the experiences of other patients to inform their health care decision making. The following comments from survey respondents confirm this.

“I take other patients’ opinions into consideration, because they are the ones being treated and I want to relate to someone who is in my shoes.”

“I get an unbiased look at how other people feel about this doctor and what they feel is best about their experience.”

“[Other patients’ experiences] impact which doctors I use by telling me the way the doctors treat their patients, and how the office in general treats new patients.”

Turning Insight into Action

Understanding health care consumers’ approach to decision making can help health care organizations design strategies that ensure consumers have access to the information they are seeking via the channels they are most likely to use.

For example, given the strong association between patient experience and consumer loyalty, and consumers’ predilection for Internet research in general and online reviews in particular, health systems that openly share physician review data on their websites using the patient experience data they collect for benchmarking are making an important investment in the competitive viability of the organization. In addition, the common consumer practice of typing into a search engine the name of a physician to whom they have been referred suggests the importance of search engine optimization (SEO) as part of a comprehensive marketing strategy.²

To extract the most value from patient experience data, health systems should maximize the data’s full potential not only as the key to achieving excellence in measures of safety, clinical quality and patient-centeredness, but also as a powerful driver of patient loyalty and brand perception.

To this end, it is essential for marketing to have a seat at the strategy table, working with enterprise leaders to develop a blueprint for engaging consumers with information that speaks to their needs, values and behaviors through channels that will reach them.

From a brand perspective, the following patient experience-based strategies will produce the most tangible results across the enterprise.

- **Embrace transparency of patient experience outcomes.** The goal of collecting and openly sharing providers’ metrics is fourfold: improve outcomes, empower patients, build trust and manage the brand. Considered in this way, transparency is not a marketing initiative. It is an enterprise initiative with important operational, clinical and marketing implications. Therefore, an effective transparency strategy is one that brings stakeholders from each of these domains to the design table to instill a sense of ownership of the effort across the enterprise.
- **Understand the drivers of patient loyalty.** A summary statistic to describe consumer loyalty does not provide the differential information needed to understand what brings patients through the door or what keeps them coming back. Real insight comes from digging deeper using advanced analytics and identifying the key differentiators across segments. Doing so provides actionable information that allows organizations to target improvement efforts to meet the unique needs of the consumers they serve.

- **Elevate patient loyalty to the board level.** Loyalty is often a key metric on marketing dashboards, but its interdependence with enterprise-wide outcomes supports raising its profile. Board members and senior leaders are increasingly relying on targeted metrics to drive comprehensive transformation strategies. Giving these leaders a clear line of sight into brand perception and patient loyalty supports integrated efforts to guide their organizations' journeys to excellence.³

Conclusion

The data make it clear that patient experience is more influential than traditional marketing strategies for managing brand perception. For this reason, health systems should integrate patient experience performance into patient acquisition and consumer loyalty marketing plans. Considering the growing body of evidence indicating that performance on patient experience measures is highly interdependent with care safety and quality, workforce engagement and financial outcomes, this approach aligns well with the principles of a recent integrated framework for achieving transformational change.⁴

¹ Daniels, Chrissy. 2018. "[Why Patients Seek Out Negative Reviews.](#)" July 31, 2018. Improving Health Care Blog, Press Ganey Associates, Inc.

² Mahoney, Diana. 2016. "[Online Physician Reviews: Adopting Transparency Standards Protects Your Brand.](#)" Aug. 4, 2016. Improving Health Care Blog, Press Ganey Associates, Inc.

³ "[Driving Organizational Transformation: Metrics and Incentives.](#)" 2018 white paper, Press Ganey Associates, Inc.

⁴ "[A Strategic Blueprint for Transformational Change.](#)" 2018 Strategic Insights report, Press Ganey Associates, Inc.

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