



REPORT

 PressGaney

# Consumer experience trends in healthcare 2023

a  PG Forsta company

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## Executive summary

The widespread move toward digitalization in every aspect of modern life has been a well-documented and much explored topic. Companies across industries are harnessing new technologies to attract users, win loyalty, and boost profits. In healthcare, the pandemic inspired and accelerated digital usage—leading to a long-overdue transformation that’s helping savvy organizations improve access, experiences, and outcomes.

**We surveyed 1,000 healthcare consumers** to see how their preferences, behaviors, and expectations have changed since we last conducted this study in 2021. And we learned that 2023 marks a paradigm shift in how patients find, research, and make decisions about their health and care.

# Our 2023 report explores the following topics:



## A tipping point for online search

Consumers' reliance on referrals alone has been steadily trending down YOY. Now, for the very first time, self-directed online search has surpassed provider referrals in the hunt for a new primary care provider (PCP).



## Reviews are table stakes

Reading online reviews has become an integral part of the research and selection process over the last decade. Today's consumers want a deeper-level understanding of providers, and what to expect from the experience. Building out detailed, robust provider profiles has never been more vital to new patient acquisition.



## Consumer confidence begins online

Reviews drive trust and set expectations. While people are looking for a common brand story across the web, the most credible source of online information is a hospital's own domain.



## There's no PX without CX

Consumers don't distinguish between different touchpoints. To them, the consumer experience (CX) is embedded within the patient experience (PX)—it's one continuous journey. What happens outside of clinical interactions is just as important as what happens inside the "four walls." Reducing friction—during the research phase, scheduling, communication, billing, and more—is key to improving patient acquisition and long-term loyalty.



## ROI of an integrated strategy

Doing more with less is only possible when you integrate initiatives between departments, leveraging work and investment across your enterprise.



## Knocking down barriers to care

The pandemic accelerated digital transformation across the industry. And it's proving to be a boon for patients, who report that finding and choosing a provider is easier than ever. If you can't say that about your institution, this means the bar is set even higher, and you need to catch up.



# Overview

The consumerization of healthcare has become a hot-button topic over the past decade. We're seeing massive transformation in the digital patient experience—perhaps due to the “great digital acceleration” that took place during the pandemic. And the results have been largely positive—especially when looking at issues like access: **58.3% of patients today say the process of finding care is “easy” or “not difficult”**—an impressive jump from 45.6% who said the same just a few years ago.



Consumers' reliance on digital channels in their care-seeking journey continues to grow—and, in fact, it's become more nuanced. For the first time, use of the web in finding a doctor has surpassed physician or personal referrals. While reviews are now table stakes in this process, on average, consumers are reading fewer.

One major trend we're seeing is that, on top of expecting digital convenience, consumers also prioritize the “human” element. The #1 factor when selecting a provider is the quality and completeness of a profile—meaning, it's more critical than ever for your providers to not only supply basic, accurate, and up-to-date information, but also showcase who they are as individuals—their personal care philosophy, how they approach patient relationships, and what to expect as a patient.

With innovators continuing to invest in digital transformation, the bar is set higher than ever. Read on for the rich insights we've gleaned about how consumers find and choose care in today's digital climate.

# The patient journey in 2023

## 1 Discovery

Patients rely on digital sources

# 3.1x

more than provider referrals when choosing a new PCP—and 2x more than provider and personal referrals combined

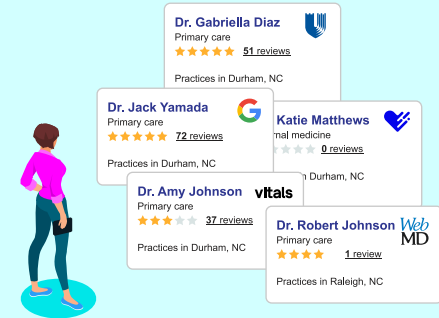


## 2 Consideration

On average, patients read ~5 reviews and visit

# 2-3 sites

before choosing a provider



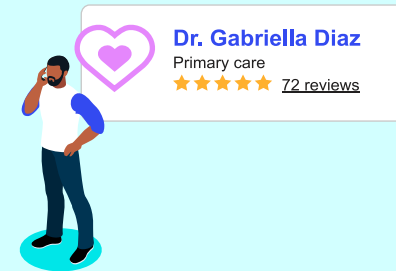
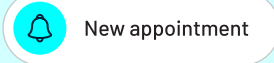


### 3 Selection Quality and completeness

of a provider's online profile is the #1 factor before someone books an appointment

### 4 Scheduling 60.5%

of consumers prefer to book appointments via digital channels (online, app, or email) vs. calling the office



### 5 Loyalty Quality of customer service

is the top driver of patient loyalty and 5-star reviews\*

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

From Sammi



### Referral leakage



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

The leading cause of referral leakage is the **availability of relevant and accurate information online**



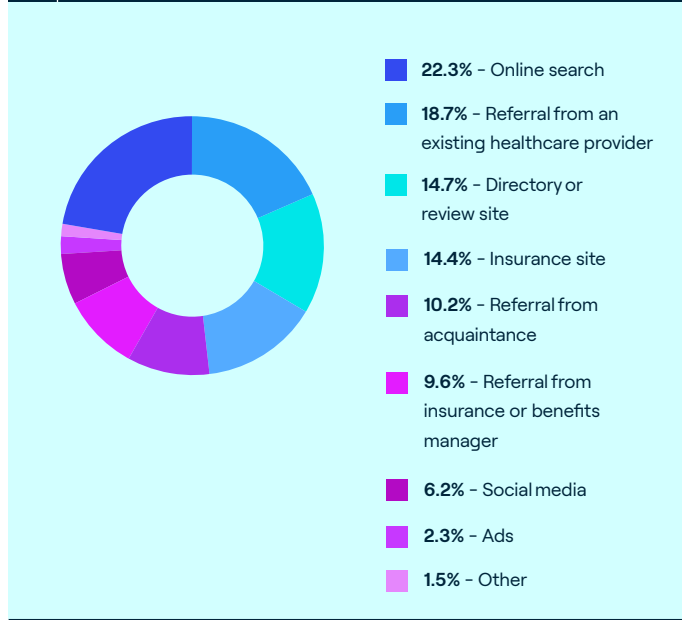
# Online search has reached a tipping point

Use of the web to find and choose care has been gaining steam for years. And, for the first time ever, online search has eclipsed provider referrals in how most consumers find and make decisions about healthcare.

22.3% of healthcare consumers say they predominantly use online search to choose a new PCP, vs. 18.7% provider referrals. The power of physician referrals has consistently been on the decline. In fact, relying on provider referrals is down 21.3% over the previous year, while reliance on word-of-mouth referrals from acquaintances fell 43.5% during that same timeframe.

On the flip side, digital sources are making major gains. Consumers' use of online healthcare directories and review sites jumped 10.8%, with 14.7% of survey respondents reporting they are the most used resource in their research. Use of provider directories on insurance websites is also up 10.2% YOY. Social media and advertisements remain the least relied-upon sources (6.2% and 2.3%, respectively).

**Q:** Top resources used when choosing a new primary care provider:



**Online search (22.3%) has surpassed provider referrals (18.7%) for the very first time.**



## Deep dive into online search behavior

Consumers are more sophisticated in how they search for—and choose—care. With digital behaviors deeply embedded into their research process, and healthcare organizations better equipped to meet those needs, the industry is experiencing positive momentum in terms of access and information. Patients report that it’s easier than ever to find—and make decisions about—the right healthcare for their needs.

While Google is still the #1 platform in a consumer’s online journey, the search engine and other non-healthcare-specific sites (like Yelp and Facebook) have seen the greatest decline in usage year over year. Another noteworthy trend: The use of pharmaceutical or medical device websites has increased 82.3% among consumers searching for care, as drug and device makers take advantage of the digitalization of the patient journey to inject themselves into the research phase.





## A new, AI-enabled era for search

Today's search experience is familiar and straightforward. But the rise of generative AI will transform how consumers view and digest information about providers. With AI and machine learning technologies (like large language models) entering the mainstream, Google's approach is to pull in data from third parties (like Healthgrades, Vitals, RateMDs, and more) as well as find-a-doctor directories on hospital websites. It will use this data to populate the top of search results—i.e., in consumers' direct line of sight.

That means healthcare organizations must think beyond the traditional "name, address, phone number." Disseminating and maintaining robust, accurate, up-to-date information across the web will become even more important to patient acquisition. Using the right content on the website to power frequently asked questions will also become key, as conversational search starts to go mainstream.

How consumers conduct their online search depends on the person. The majority (35.1%) enter the type of doctor or specialist they're looking for and "near me." But the use of maps to find care has increased 137%. We've also seen a 21% uptick in searching by healthcare concern/treatment needed, plus "near me."

Q: Which of the following best describes how you conduct your search for healthcare online?	
I enter the type of doctor or specialist I'm looking for, and "near me"	35.1%
I enter my healthcare concern, condition, or treatment needed, and "near me"	19.1%
I enter the name of a clinic, practice, or hospital	17.2%
I enter the name of a specific provider or specialist	14.8%
I use maps to find the closest clinic, practice, or hospital	13.1%



## The mobile takeover, and the decline of PCs

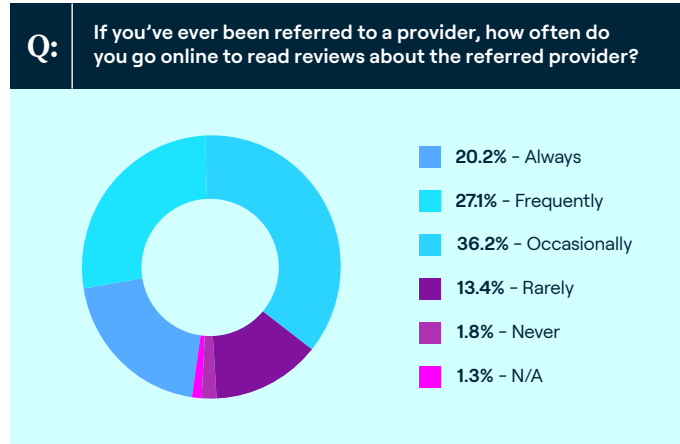
A mobile-first mentality is becoming increasingly widespread. 69.9% of consumers prefer to use a smartphone or tablet when searching for a provider online, while preference for laptop/desktop computers has **dropped 27.9% YOY.**

# Online reviews are table stakes for consumers

Reviews remain a fixture of the consumer journey. In fact, ratings and reviews of providers are the #1 factor in a patient's research process, outpacing ratings and reviews of the facility (#2) and doctor referral, which fell to the #3 spot. 83.5% of patients will at least "occasionally" go online to read reviews about a provider they've already been referred to.

Simply having reviews is no longer differentiating. Reviews are now a baseline for consumers looking for their next provider.

But consumer behavior around reviews is more nuanced than before. Nearly  $\frac{3}{4}$  (73.7%) read between one and six reviews before making a decision about a healthcare provider, though the average number has dipped from 5.5 to 4.7. While consumers may be reading fewer reviews, those reviews carry more weight in their selection process. It comes down to quality over quantity.



After searching for a provider online, having poor-quality reviews (e.g., those that seem sponsored or otherwise untrustworthy) is the #1 reason a patient would not choose a provider—in fact, half of consumers would continue their search. Comparatively, 30.4% of consumers say not having enough reviews online would discourage them from choosing a provider.

## Securing consumer trust in the digital age

Not all sources are created equal. Health system and hospital websites are the most trusted sites for reviews, while non-healthcare review sites—like Yelp—are trusted the least.

### Health system or hospital websites are the #1 most trusted source of healthcare reviews.

There's power in numbers: The more reviews you have, the more trustworthy the data becomes—building consumer confidence from the get-go.

Telling a consistent brand story across the web is critical to patient acquisition. On average, consumers check 2.3 sites before selecting a provider. And 35.7% say the availability of reviews on more than one website matters to their search (up 29.6% YOY). Recency is also key: 64.8% of consumers think reviews over one year old are no longer relevant.

This underscores the importance of collecting reviews regularly and routinely updating review sites with recent survey data and comments.

While most consumers consider 4 (out of 5) to be the lowest-acceptable rating for a provider, the most important factor when reading reviews is the quality of the review (i.e., its credibility and helpfulness)—beating out average star rating, review volume, and review recency.

The stakes in healthcare are high. Consumers want quality, trustworthy reviews—and they are most likely to trust reviews on a health system website. Publishing feedback, gathered as part of a continuous surveying program, to your provider directories ensures consumers have access to a robust set of authentic patient reviews.

Q:

Which of the following factors are important to you when reading patient reviews?

1. Quality of reviews (e.g., from a credible source, helpful, gives valid/reasonable feedback)
2. Doctor's average rating
3. Date of most recent review
4. Total number of reviews
5. Availability of reviews on more than one website

## The convergence of CX and PX

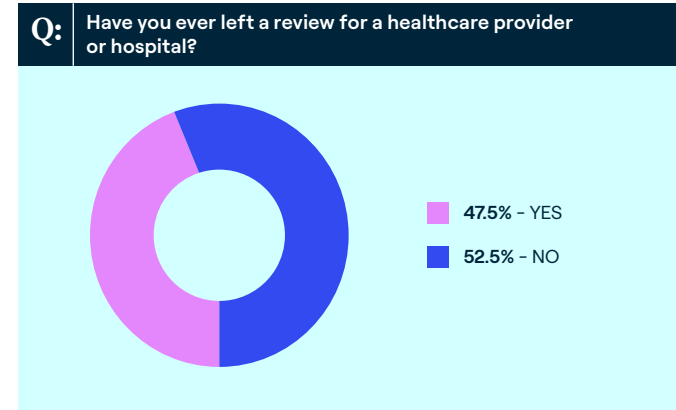
Candid patient reviews help set patient expectations. 84.7% say their personal healthcare experiences were reflected in the reviews they read online. And the number of consumers who called reviews “very accurate” rose 58.3% over the previous year’s data.

More and more healthcare institutions are embracing transparency—i.e., collecting and publishing patient reviews online, on third-party sites and proprietary domains. This kind of transparency is a game-changer. Patients equate the review experience with the true experience. That is, reviews are an anchoring mechanism that builds consumer confidence and sets expectations about what the experience will be like when they get to a facility and see a provider.

# 84.7%

of consumers say their own healthcare experiences “very accurately” or “fairly accurately” reflect online reviews.

The number of people who have left a review of a healthcare provider has dipped slightly (down 4.83% since 2021). A proactive strategy for collecting patient feedback is now more important than ever for bolstering the online reputation of your organization, facilities, and providers.



Anonymity may be crucial in collecting more reviews. Over  $\frac{2}{3}$  (66.8%) of consumers say they’d be likely to write a review of a healthcare experience if they could ensure their feedback would remain anonymous. At the same time, 43.5% would be likely to post about a healthcare provider or hospital on their own social media accounts.

# Transparency in healthcare is paying off, in big ways

When the consumerism movement was in its infancy, there just wasn't enough information out there to inform patients' decisions about care. Many providers and healthcare facilities had little-to-no online presence. Virtually none had the robust online profiles, accurate information, online appointment availability, and high-quality patient reviews that today's consumers deem essential.

## With knowledge comes power

Two years ago, 54.4% of consumers called the process of finding a provider at least somewhat difficult. But the tide has turned thanks, in large part, to the industry's investment in improving access, and the pandemic's acceleration of all things digital. Today, the easiest and most convenient way to find a provider is online, where endless information is at consumers' fingertips. Nearly 60% of consumers now say the process of finding and choosing a new provider or specialist is "not difficult" or even "easy."

For the other 41.7% who still struggle to access healthcare, the challenges remain largely the same: appointment availability and finding an in-network doctor are consistently the top two roadblocks.

Notably, the effort to find a provider being "too time-consuming," which previously ranked among the top three barriers to care, fell by 68.3%.

Q:	Common challenges in finding a healthcare provider:
1.	Has appointment availability
2.	Finding a provider that accepts my insurance
3.	Finding a doctor in my area
4.	Finding a doctor with good ratings
5.	Time-consuming
6.	Finding a doctor that treats my specific condition
7.	Not enough information about a provider online

Today's patient journey starts online—and that's also where the trust-building process begins: when consumers are reading reviews. So even if the patient went to a provider whom they found and chose from stellar online reviews, and they didn't love every aspect of their visit, they may think they had the outlier experience.



# The people behind the profiles: A human approach to online listings

Yes, consumers increasingly prioritize convenience and speed during their journey to care. But the importance of creating a human-to-human connection, even in the digital landscape, can't be overstated. At the end of the day, consumers want to know they're in the right hands—and that means getting to know the person behind the profile.

Before booking an appointment, the #1 deciding factor in provider selection is “the quality and completeness of a doctor’s online profile,” followed by reviews of the facility (#2) and provider reviews (#3). This is a departure from last year’s data, when “ratings and reviews of the specialist or provider” claimed the top spot. “Doctor referral” also fell from third to fourth place.

Robust, detailed listings information is a nonnegotiable in attracting new patients. Providers’ online profiles not only need basic information—like location, specialties, insurances accepted, and languages spoken. They also need a deeper level of insight, to reflect who someone is as a clinician, and what makes their care philosophy unique.

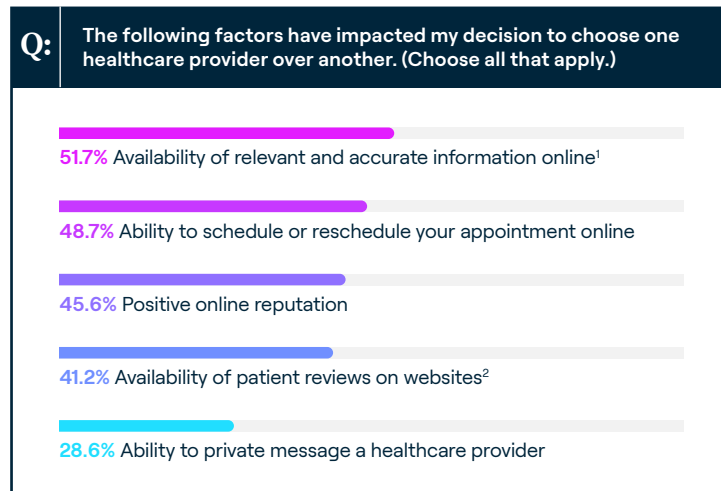
Q:

Before making a doctor’s appointment, how important is each factor in your selection of a provider?

1. Quality and completeness of doctor’s profile on a website or directory
2. Ratings and reviews of the facility (i.e., the practice, clinic, or hospital)
3. Ratings and reviews of the specialist or provider you’re considering
4. Doctor referral
5. Quality of website or app
6. Search ranking

**The quality and completeness of a doctor’s online profile is the #1 deciding factor when booking an appointment.**

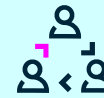
When asked what's impacted someone's decision to choose one provider over another, consumers ranked the "availability of relevant and accurate information online" as #1, with the "ability to schedule or reschedule your appointment online" nipping at its heels.



<sup>1</sup> address, insurance, specialty, hours, etc.

<sup>2</sup> Healthgrades, Vitals, Yelp, etc.

The human element of in-person care is a clear draw for patients. All things being equal, 57.8% of patients prefer in-office visits with their primary care provider—over twice the preference for telehealth (23.2%) and 3x the preference for urgent care visits (19.0%).



## Streamline access to drive conversion and gain the competitive edge

For most consumers, making a phone call is an antiquated method of contacting the doctor's office and booking an appointment. Over 60% prefer to book digitally—i.e., online, mobile app, or email. A lack of online scheduling options would discourage 26.9% of consumers from booking an appointment. And nearly half (48.7%) say the ability to schedule or reschedule their appointment online has impacted their decision to book with one healthcare provider over another.



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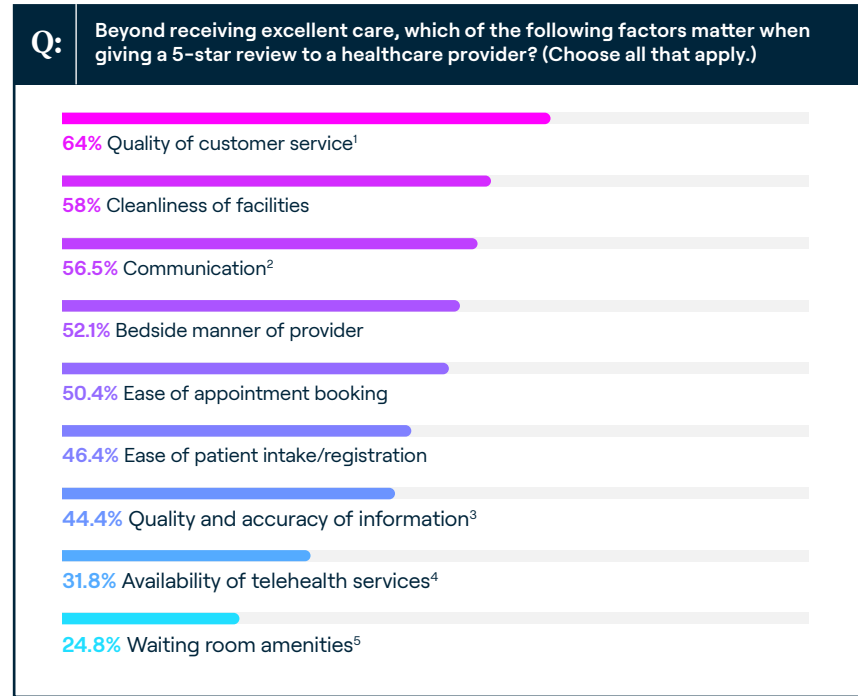
[Schedule online](#)





## A 5-star review starts with the Human Experience

Beyond receiving excellent care, the #1 factor in a 5-star patient experience is the quality of customer service. People want to be treated with respect. They want to be greeted by staff with a pleasant demeanor, and for the staff and practitioners to be attentive and helpful. They want to interact with and be cared for by people who they believe truly care about them. This establishes a sense of trust, and leads to returning patients.



<sup>1</sup> e.g., demeanor, attentiveness, helpfulness of staff and practitioners

<sup>2</sup> e.g., follow-up appointment reminders, annual check-up reminders

<sup>3</sup> found online about the healthcare provider

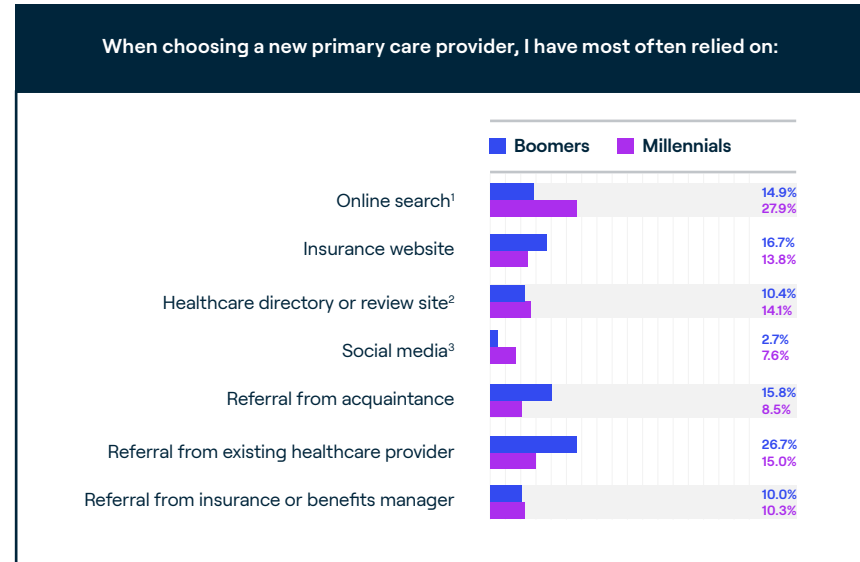
<sup>4</sup> i.e., phone or video appointment

<sup>5</sup> e.g., magazines, water

# Boomers go digital

Millennials and Gen Z consumers are widely accepted as early adopters, and champions, of all things tech. But in recent years, the technology curve between generations is flattening, and even boomers are taking a digital-first approach to healthcare.

Approximately one in four members of the baby boom generation mostly relies on provider referrals when choosing a new PCP. But ~45% cite digital resources—insurance websites, online search, healthcare directories and review sites, and social media—as the leading source in making that choice. For millennials, the narrative is flipped: Nearly 2/3 lean more on digital sources, while 15% say provider referrals are their most used resource.



<sup>1</sup>e.g., Google, Bing

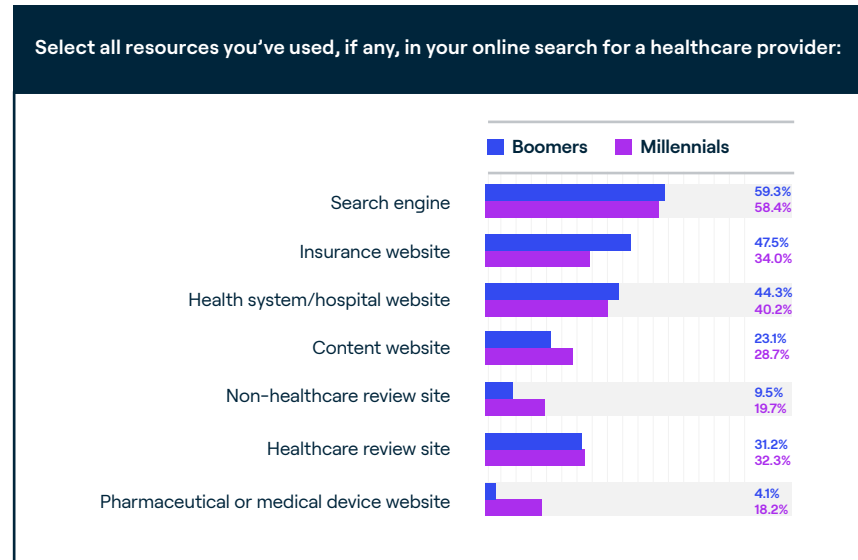
<sup>2</sup>e.g., Healthgrades, Vitals

<sup>3</sup>e.g., Facebook, Instagram, Twitter

But the larger story is more complex. A robust digital presence is no longer a nice-to-have to drive acquisition across all generations.

While, for boomers, a personal or professional referral might be the jumping-off point in their healthcare journey, this generation still flocks to the web for the next phase of the research process. 59.3% of boomers have used a search engine to look for a healthcare provider—slightly above millennials (58.4%). What’s even more surprising, boomers are neck and neck or even outpace millennials in digital adoption. The two notable exceptions are non-healthcare review sites like Yelp, which millennials use 2.9x more than boomers, and pharmaceutical or medical device websites, where millennials beat out boomers by 4.5x.

Boomers are also becoming increasingly digital in how they prefer to book an appointment, once they’ve made their decision. 46.6% say they want to secure their appointments online, via an app, or through email—up from 38.7% YOY.



## Boomers' sky-high expectations for the 5-star experience

Ratings and reviews carry a lot of weight among boomers and millennials alike. 59.3% of boomers say ratings and reviews of the provider are "very important" or "extremely important" before booking an appointment with a doctor, with 62.8% of millennials in agreement. Boomers care slightly more about ratings and reviews of the facility (e.g., the practice, clinic, or hospital) than millennials do: 62.0% vs. 60.4%, respectively.

By contrast, 62.9% of boomers and 54.8% of millennials call doctor referrals very or extremely important in their selection of a provider.

When reading reviews and evaluating their options, boomers and millennials are both sensitive to a doctor's online reputation. 55.7% of boomers and 54.8% of millennials say 4 stars (or above) is the lowest-acceptable rating for a healthcare provider. But who's rating providers and writing reviews? Millennials are the primary contributor: Over half (52.8%) have reviewed a healthcare experience online, vs. 42.1% of boomers.







## Spotlight on digital natives

Gen Z (born between 1997 and 2012) grew up with the internet in their pockets—with social media the norm, not a novelty. Digital communication has always been available, and most were even educated over Zoom during a once-in-a-lifetime pandemic. So, it's no surprise that Gen Z's preference for all things digital has been hardwired into their behaviors—even in their approach to healthcare.

While the youngest subset of Gen Z still relies on parents or guardians, its older members (18–26-year-olds) are becoming responsible for their own healthcare—possibly for the very first time. Many are aging out of their parents' or guardians' health plans, too. In the not-too-distant future, this generation will become a driving force behind healthcare trends. Getting a jump start on how this population thinks, feels, and makes decisions will give forward-looking organizations the competitive edge.

### 4 fast facts about Gen Z

#### 1 Bumpier patient journey

Despite being more plugged in, 56.8% of Gen Z consumers describe the process of finding and choosing a doctor “somewhat” to “very” difficult (vs. 47.8% among millennials and 28.1% of boomers). Gen Z is also less likely to seek out healthcare services\* than other generations.

#### 2 Least likely to share

Only 39.9% have reviewed a healthcare experience online—and Gen Z is the least likely to use review sites in the first place. But nearly half (48.7%) would be likely or very likely to share information about a healthcare experience on their personal social media accounts.

#### 3 Plugged in, and on the go

Gen Z is more digitally forward than any other generation. 71.0% most often rely on digital resources when choosing a new PCP, with just 23.0% mostly relying on referrals from an existing provider, acquaintance, or insurance/benefits manager. And when researching providers, 72.3% prefer to use their smartphone (vs. a computer or tablet).

#### 4 Tuned in socially

15.5% most often use social media to find a primary care provider—much higher than other generations, and even 2x the rate of millennial usage. The breakdown among social media sites: 27.5% have used Facebook, 20.0% TikTok, 19.2% Instagram, and 14.2% Twitter.

# Key considerations

As healthcare leaders are under increasing pressure to drive profits, while facing some of the most challenging circumstances to date, a few digital- and consumer-first strategies will help attract, convert, and retain more patients. So you improve your bottom line, when so much is on the line.

## 1 Embrace the digital revolution

As use of the web and tech continues to rise and define consumer behavior, organizations that don't invest in digital-first patient acquisition strategies will lose ground in this new era for healthcare. To meet this watershed moment, a company with the most cutting-edge technology, married with the [deepest industry expertise](#), will make an important partner.

## 2 Reboot your listings strategy

Improve your brand's visibility, attract consumers, and convert more patients through robust, compelling, and detailed profiles, everywhere people search for care. Using [one central profile](#) to keep all your listings correct, consistent, and up to date makes it easy.

## 3 Let patients sing your praises

Authentic patient reviews were once hailed as the modern-day "word of mouth"—but they've evolved into something much more meaningful. They are the building blocks of patient trust, and key drivers of new patient acquisition. [New tech tools](#) let you capitalize on patient survey comments, turning them into authentic reviews syndicated web-wide, transforming each great experience into a marketing opportunity.

## 4 Look inward

Your organization's website is the source of information consumers trust most. Bring them in via your digital front door with a well-executed provider directory, complete with listings, [reviews](#), and online booking capabilities.

## 5 "Not difficult" is not enough

[Friction](#) is a leading cause of patient leakage. But streamlining the patient journey and improving access to care must be an industry-wide imperative, not only because it drives acquisition, but also because it's simply the right thing to do.

## 6 Humanize the patient journey

People crave connection and [human interaction](#)—especially in healthcare. Infusing your organization's digital presence with personality starts building that relationship from the get-go.

# Maximize the ROI of your CX strategy

To learn more about Press Ganey's cutting-edge consumer experience technology, visit:

[pressganey.com/request-a-demo](https://pressganey.com/request-a-demo)

## Survey methodology

This online survey depicts findings from 1,000 respondents representing the U.S. adult census demographic of regions, incomes, and genders, age 18 to 60+, who had searched for a provider in the past 12 months. Research was commissioned by Press Ganey and conducted during December 2022.





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