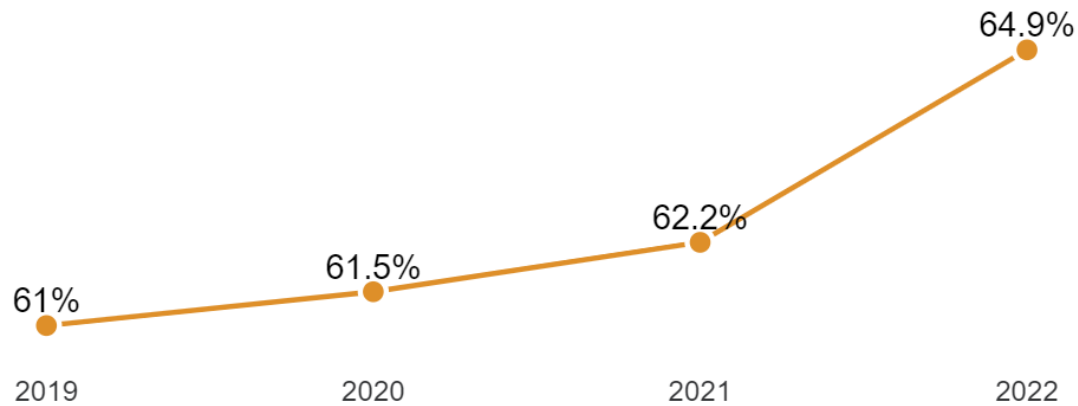


The current pattern of chaos and calm punctuated by COVID variants makes it even more important to track trust and loyalty, as organizations contend with deferred care and decreasing margins.

What drives loyalty at the market level?

NRC Health's Market Insights study scans for what drives loyalty to a healthcare brand. The top 3 factors in 2022 might not be a surprise: insurance coverage, previous experience – that's where building trust over time comes in – and convenient location are all drivers of loyalty for at least half of consumers. These same factors, in the same order, were at the top in each of the previous three years as well.

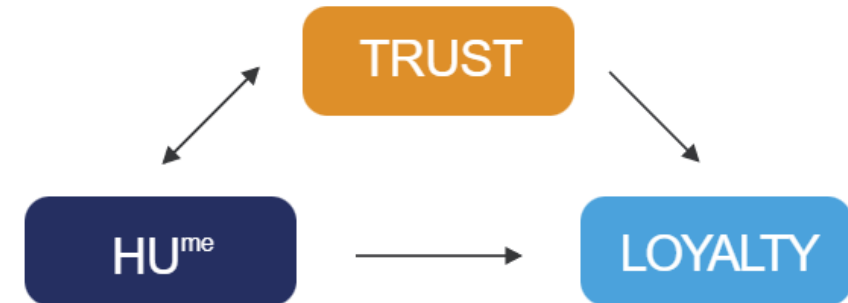
Loyalty to a hospital or health system



National Market Insights Study | 2019 n = 284,757 | 2020 n = 292,501 | 2021 n = 278,304 | 2022 n = 283,248

What about loyalty at the provider level?

As measured by the Human Understanding Metric (HU^{me}), the feeling of being treated as a unique person is – by far – the main driver of Loyalty. It turns out that HU^{me} can lead to more Trust, Trust can lead to more HU^{me}, and both are important when it comes to Loyalty. In sum, while Trust and Human Understanding are connected, they are also distinct features of clinical interactions and should be treated as such when considering improvement initiatives geared toward provider loyalty.



Our data shows that trust is built largely through listening but also by knowing patients' medical history and giving them as much information as they want. Perhaps the best way to proactively generate and maintain loyalty is to encourage everyone to treat each patient as a unique person at every opportunity and to help providers build trust over time, one patient at a time.