



Consumer Preferences for Urgent Care

Findings from the 2019 Consumer Preferences Survey

PUBLISHED BY

Market Innovation Center

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15 min.

The last time you needed basic urgent care,¹ where did you go?

We asked 3,000 respondents that question to learn where consumers are going for basic urgent care needs, and how they are making their decisions.

47% of respondents told us they did not go to a traditional primary care office but rather used an alternative option, such as an urgent care center, retail care clinic, or virtual visit, instead.

This suggests that the power of consumer preferences is re-sculpting the primary care landscape. Winning today's urgent care patients requires provider organizations—urgent care center, virtual platform, and primary care office alike—to understand and deliver on top consumer preferences.

1) For example, a fever, sore throat, rash, minor sprain, etc.

How can providers compete for **basic urgent care** volumes today?

Consider these **ten insights** in your consumer strategy.

The bigger picture

1. Top six attributes more important than other 26 combined.
 2. Younger consumers spread their preference across more clinic features.
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On-demand access

3. Over 2/3 of consumers with a regular PCP would bail without a same-day option.
 4. Walk-ins preferred to appointments and waitlists.
 5. Older patients are least tolerant of wait times.
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Location and co-location

6. Nine attributes may be worth a longer drive.
 7. Worksite clinics: the last place consumers want to go.
 8. On-site lab and X-rays a must, pharmacy a nice-to-have.
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Differentiators

9. Upfront, low prices are just tiebreakers.
 10. Availability of virtual care a low priority.
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Appendix

About the 2019 Primary Care Consumer Choice Survey

We asked 3,000 respondents from across the U.S. about their primary care experience, as well as their clinic preferences for two different types of primary care:

Basic urgent care

We defined this as the type of care an individual receives for low-severity episodes such as a fever, sore throat, rash, or minor sprain.

1,501 respondents saw this MaxDiff.

Routine, non-acute care

We defined this as ongoing primary care, including prescription refills, vaccinations, medication management, or chronic condition check-ups.

1,499 respondents saw this MaxDiff.

To explore these results, check out “Consumer Preferences for a Primary Care Clinic,” available on [advisory.com](https://www.advisory.com).

What’s changed since the 2014 Primary Care Consumer Choice Survey?

In 2014, we ran a similar survey to understand consumer preferences for episodic primary care. In the current survey, we expanded the questions and tweaked the options to reflect the changes our researchers have observed in the primary care landscape. For more details on how consumer preferences have changed over the past five years, please see “2019 Updates in Primary Care Consumer Preferences,” available on [advisory.com](https://www.advisory.com).

How did we define a primary care clinic?

We told respondents a primary care clinic could include a doctor’s office, retail care clinic (ex. CVS MinuteClinic, Walgreens Healthcare Clinic, Clinic at Walmart), urgent care center, or an online visit where the patient can speak with a doctor using webcam or email.

How did we find our panel?

We contracted a survey panel vendor to administer this survey virtually. Our panel had equal representation across genders, age segments, income segments, and regions of the U.S.

What’s a MaxDiff?

We used MaxDiff methodology to identify consumers’ preferences. Respondents were shown multiple screens of five clinic attributes, from which they chose the most and least important attributes. Each attribute was presented multiple times, resulting in a ranked list of attributes with corresponding utility scores indicating the relative value of each attribute.

What’s a utility score?

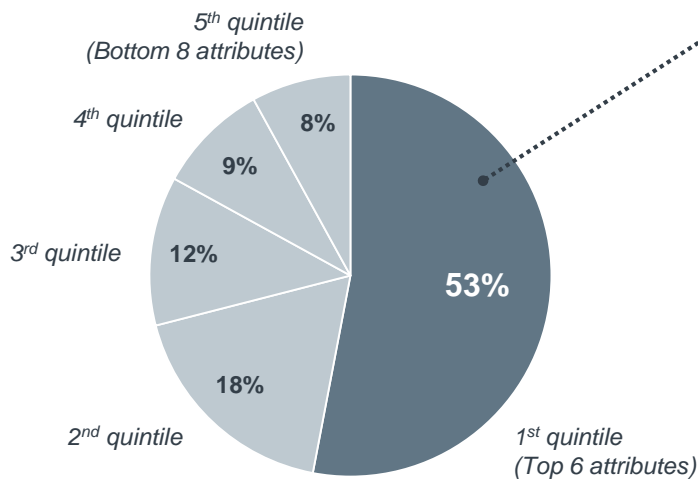
Utility scores are a measure of importance. They show us which MaxDiff attributes were most important, and how much more important they were to respondents than other attributes. Utilities are probabilities (ranging from 0 to 100) that an item would be selected as “best” among a representative set of items in the MaxDiff questionnaire. This data reflects a ratio-quality scale. The utilities are then averaged across the respondent pool to calculate average utilities.

Top six attributes more important than other 26 combined.

Just six attributes comprise over half of the total utility score for basic urgent care. Consumers want accessibility in the form of an appointment later today (at the latest), convenience by way of extended hours and ancillaries onsite, and to see an MD.¹ Everything else is much less important, and can be considered a secondary differentiator.

Sum of attribute utility scores by quintile

n=1,501



Top Six Clinic Attributes

- 1 I can walk in without an appointment and be guaranteed to be seen within 30 minutes
- 2 I can walk in without an appointment and be guaranteed to be seen within an hour
- 3 If I need lab tests or X-rays, I can get them done at the clinic instead of another location
- 4 I can get an appointment for later today
- 5 I will be treated by a doctor instead of a nurse practitioner or physician assistant
- 6 The clinic is open 24/7



Since 2014, walk-in availability has remained the #1 most important attribute for consumers seeking basic urgent care, and our survey results suggest it has increased in importance.

We were surprised to see “I will be treated by a doctor instead of a nurse practitioner or physician assistant” break into the top 10. It went from 11th in 2014 to the 5th most important clinic feature in 2019.

Learn more in our “2019 Updates in Primary Care Consumer Preferences,” available on advisory.com/primarycaresurvey.

1) Doctor of Medicine.

Younger consumers spread their preference across more clinic features.

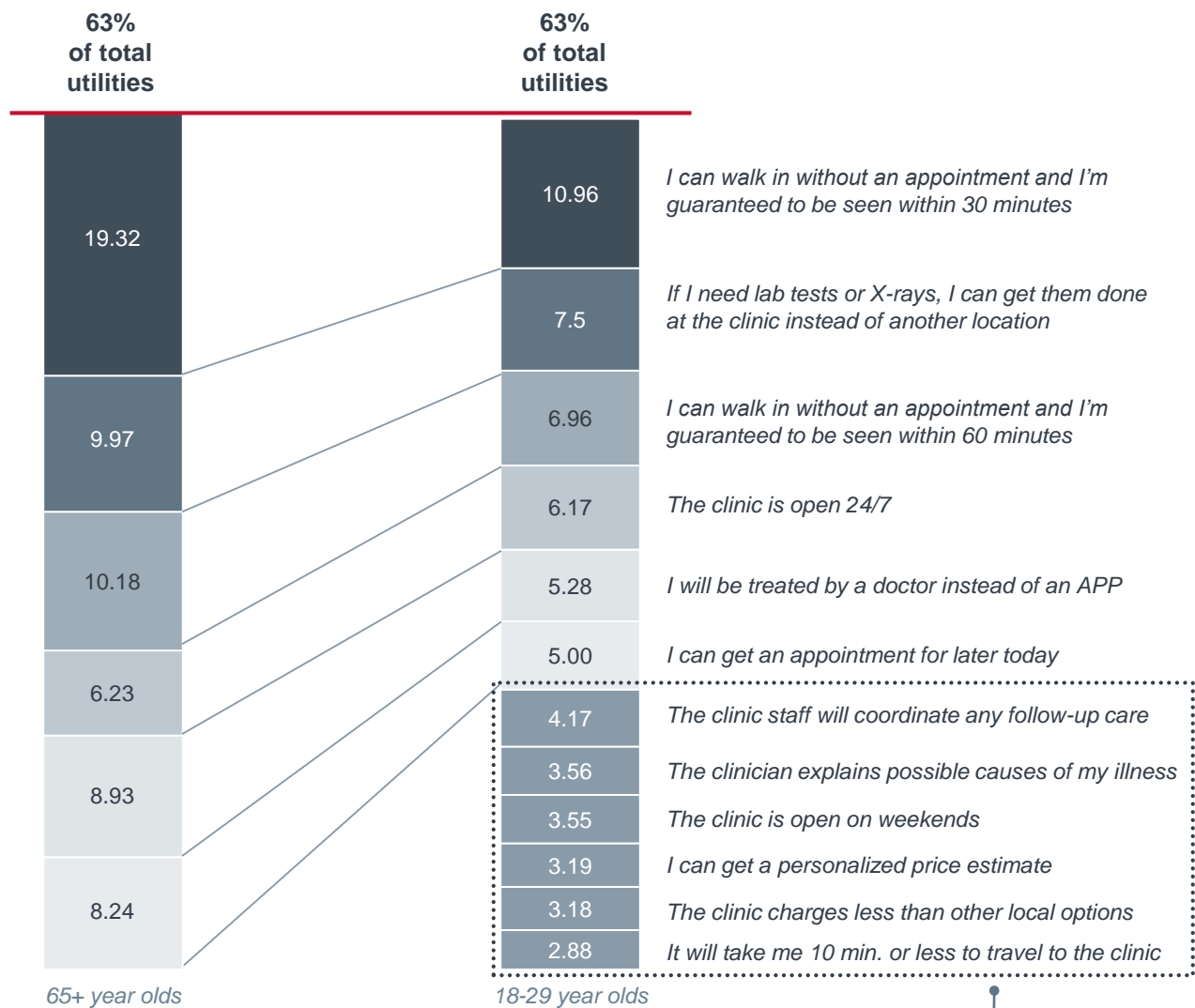
Older respondents had the strongest opinions about the top clinic attributes: just six attributes comprised 63% of the 65+ group's utility. Comparatively, 13 attributes—twice as many—comprised about 63% of 18-29 year olds' utility.

This suggests that while there is a core set of attributes that clinics must offer to even be considered by patients, taking an age segmented approach to evaluating urgent care investments may help you better compete for your target demographic.

Comparison of top attributes and average attribute utility scores by age

Attributes making up top 63% of respondents' total utility

n=386, 18-29 year olds; n=361, 65+ year olds



18-29 year olds have a much greater spread across their top attributes—they rank six more attributes than the 65+ cohort does in their top 63% of utility scores.

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

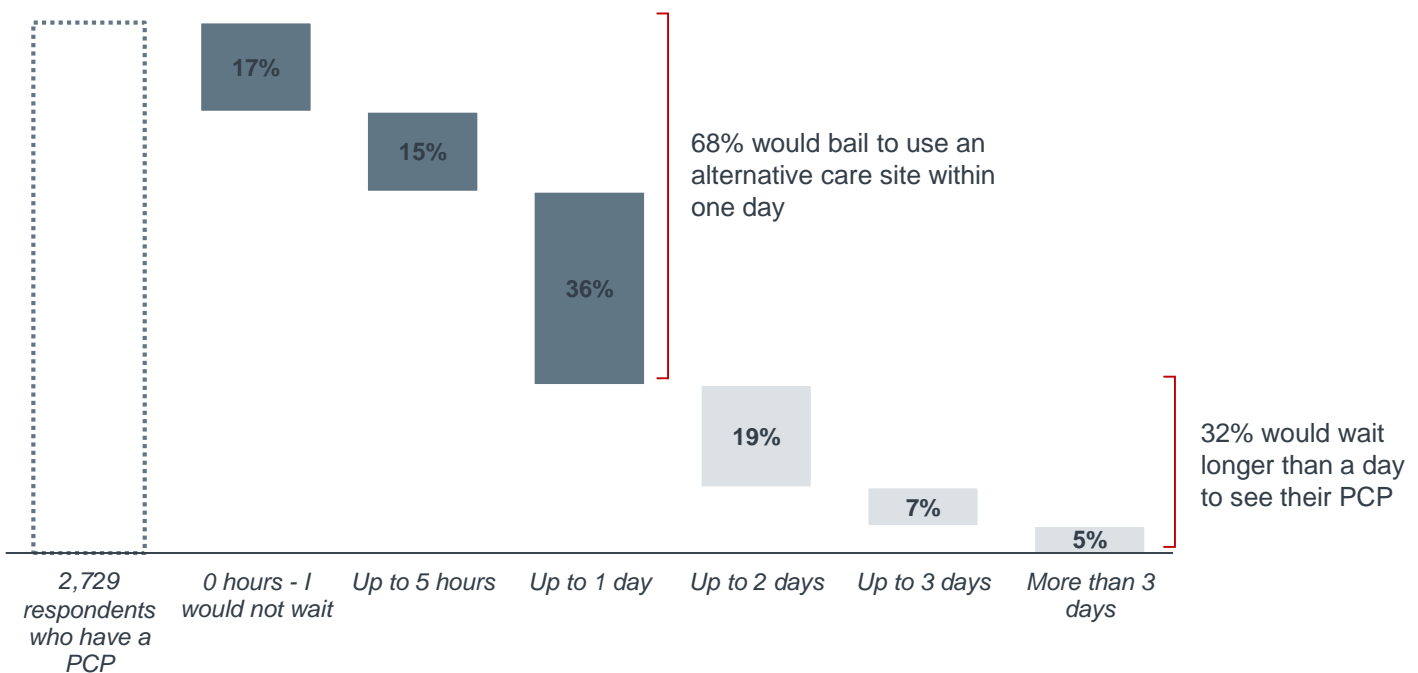
Over 2/3 of consumers with a regular PCP would bail without a same-day option.

Consumers want on-demand care, and they do not want to wait until tomorrow to see you. Of respondents with a regular PCP,¹ **68%** said that if they were sick with a fever and sore throat and their PCP couldn't see them that same day, they would use an alternative care option. Even for same-day availability, **32%** of respondents said they would wait no more than **five hours** for an appointment before bailing on their regular primary care provider.

Length of time respondents would wait for an appointment with their normal primary care clinician before considering seeing another care option for a fever and sore throat

Percentage of respondents by wait time

n=2,729



What's more, consumers are backing these preferences up with their actions. The last time they needed basic urgent care, **53%** of respondents with a regular PCP voted with their feet: they left their normal clinic to get care. **62%** of these respondents said the reason behind their choice was seeing a provider quickly.

1) Primary care provider.

Walk-ins preferred to appointments and waitlists.

Not only do consumers want to be seen same-day when they feel sick: they also have strong preferences for how that happens.

Respondents said they'd prefer to walk in and wait—preferably for a short time, but even up to an hour—over scheduling a same-day appointment. Waiting in a clinic without an appointment for up to 30 or 60 minutes ranked first and second, respectively, while waiting for a same-day appointment ranked 4th, and waiting in a virtual queue ranked 19th. These relative preferences were the same regardless of respondents' age, gender, income, insurance, ethnicity, or geography.



Consumers also had consistent preferences across another dimension of access, the clinic's operating hours. "The clinic is open 24/7" ranked 6th overall, followed by weekend hours (ranked 7th) and weekday evening hours (ranked 11th).

#6

The clinic is open 24/7



#7

The clinic is open on weekends



#11

The clinic is open on weekday evenings

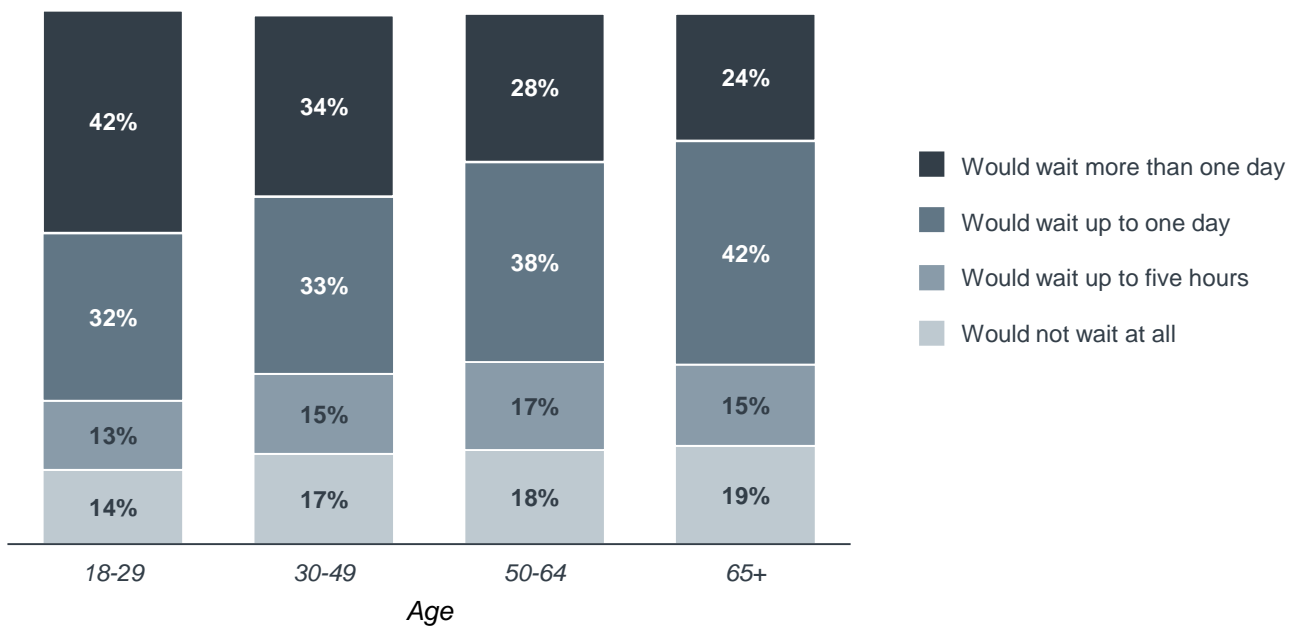


Older patients are least tolerant of wait times.

Contrary to popular belief, tolerance for wait times actually **decreased** with age. While many perceive younger generations as less patient, 42% of our youngest respondents who have a place they go for most of their primary care needs said they would wait longer than a day to see their regular care provider if they had a fever and sore throat, but only 24% of respondents ages 65+ were willing to wait that long.

Respondents' wait tolerance for acute care by age

n=2,729



So if you can't fit your patients—and especially your older ones—in same day, consider giving them the option of going to your (or a partner's) urgent care center, retail clinic, or virtual visit platform to help them stay within your network.

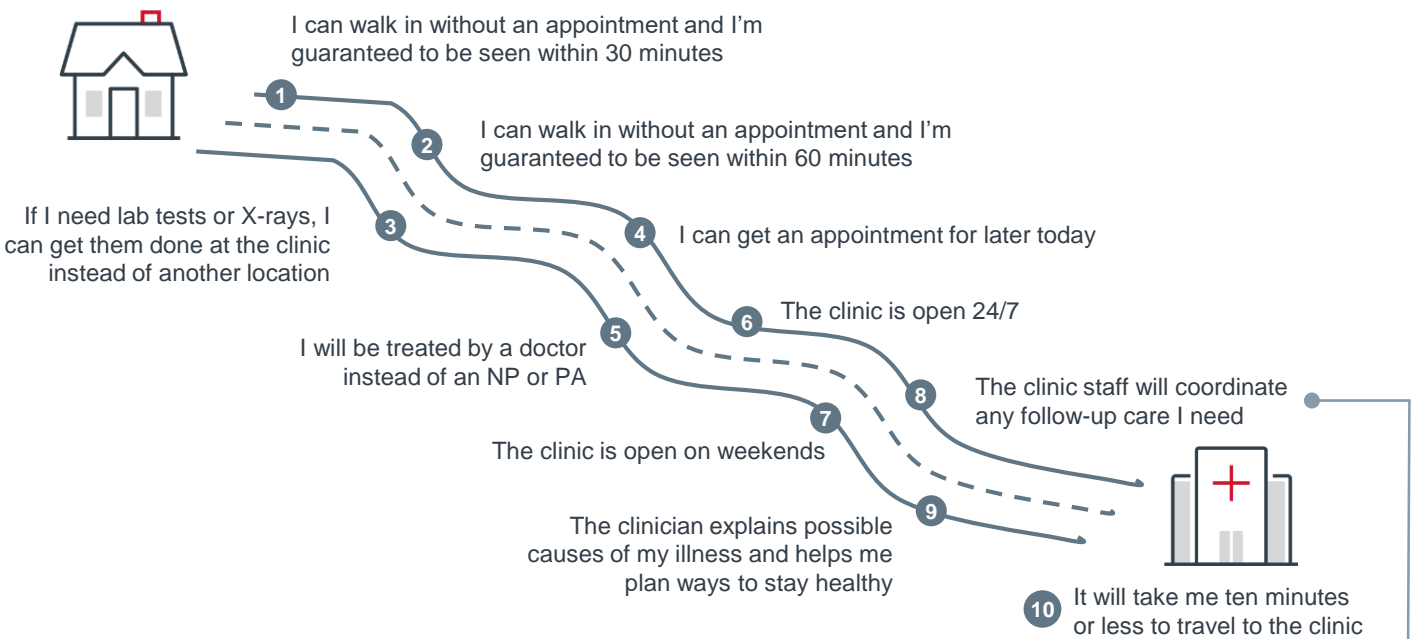
Nine attributes may be worth a longer drive.

Consumers don't want to travel far for basic urgent care, but there are a few things they may be willing to go a little further to access.

For basic urgent care, a ten-minute commute ranked 10th overall. That means nine other attributes were more important to consumers. Clinics that offer some of these top nine attributes may be able to entice consumers to drive past a closer clinic that does not offer these top priorities.

Attributes outranking a 10-minute travel time

n=1,501



Coordinated Next-Steps

While we've already talked about the importance of on-demand access and provider type, we were surprised to see this attribute rank so highly. It highlights consumers' desire for an easy care experience: they highly value a clinic that coordinates their follow-up care and next steps.

Worksite clinics: the last place consumers want to go.

Of the 32 clinic attributes we tested, “the clinic is in the building where I work” was ranked the lowest. Health systems looking to partner with employers should consider this when scoping onsite clinics. It may be more cost effective and appealing to employees to have priority access at an existing or near-site clinic.

This does not necessarily mean, however, that consumers won’t use a worksite clinic. Providers running worksite clinics need to recognize that proximity alone will not be enough to make their offering attractive to employees. They will need to offer fast access, care coordination, appointments with a doctor, or other combinations of consumers’ top priorities to win their business.



The clinic is in the building where I work

#32 / 32

Utility score = 0.62

Did this vary by age?



No. Respondents ages 18 to 64 ranked a worksite clinic in last place, while the 65+ cohort had it at 31st. They did vary in how much utility they ascribed to worksite clinics, however—the utility score for people ages 18-29 was twice as high as for people ages 50-64.

What else ranked at the bottom of consumers’ priorities?

- 28 A friend or relative recommends the clinic to me
- 29 The clinic has state-of-the-art amenities, modern décor, and looks like a nice spa
- 30 The clinic focuses on serving patients my age
- 31 I can pay my bill online
- 32 The clinic is in the building where I work

On-site lab and X-rays a must, pharmacy a nice-to-have.

Once at the clinic, consumers want to avoid another drive for lab tests and X-rays. In fact, on-site lab and X-rays ranked 3rd, above a short drive time. Interestingly, on-site pharmacy ranked 14th. This suggests that consumers may be willing to travel a little further to an urgent care or primary care clinic, which offer onsite lab and X-rays, but not for onsite pharmacy—a hallmark value proposition of many retail care clinics.



#3 out of 32 attributes

If I need lab tests or X-rays, I can get them done at the clinic instead of another location

8.78
Utility score



#14 out of 32 attributes

If I need a prescription, I can get it filled at the clinic instead of another location

2.24
Utility score

On-site labs and X-rays are almost three times as important to respondents as an on-site pharmacy.

Upfront, low prices are just tiebreakers.

The national spotlight is shining on health care costs and transparency. Deductibles and cost sharing have grown, a policy to address surprise medical bills has received bipartisan support, and price transparency tools and policies proliferate.

Even still, primary care prices do not appear to be top of mind for patients. Low prices and price transparency are mid-level priorities for consumers.

Price Transparency



Rank out of 32 **15**

Before my visit, I can get a personalized price estimate that takes my insurance into account

Low Cost



Rank out of 32 **13**

The clinic charges me less than other options in my area

These results suggest that most consumers rely on prices as more of a tiebreaker than a decision driver in primary care. From a consumer standpoint, optimizing your access strategy is, for now, more important than perfecting your pricing and price transparency strategies for primary care.

Availability of virtual care a low priority.

While consumers want a short commute to the clinic, a zero-minute commute—that is, a virtual visit—was a low priority. Respondents ranked both asynchronous (ex. via secure form or email) and webcam virtual visits in the bottom half of total attributes, at 20th and 25th, respectively. Despite industry efforts to improve virtual access to care in recent years, most consumers still prefer in-person care and treat virtual visits as more of a nice-to-have feature than key differentiator.

That said, here are the types of consumers that are most interested in virtual care.



Asynchronous outscores real-time.

Across all age brackets, submitting symptoms by form and receiving a treatment plan virtually was more appealing than a webcam-based virtual visit.



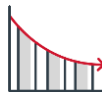
Interest in webcam visits grows with income.

Respondents in our highest income bracket (\$100,000+/yr) ranked webcam virtual visits five places higher than our lowest income bracket (<\$25,000/yr). Asynchronous visits were more evenly ranked across income brackets.



HDHP participants are more interested.

Respondents with a high deductible health plan (HDHP) ranked asynchronous visits six spots higher than their non-HDHP peers, and webcam visits five spots higher. This could, in part, be tied to age, since younger consumers—who are more likely to have a HDHP—were more interested in virtual care than older generations.



Interest wanes with more chronic conditions.

Respondents who said they have one chronic condition (CC) gave asynchronous visits the highest rank across all the demographic groups we tested: 16th. Comparatively, people with two CCs ranked it 23rd, and three CCs ranked it 25th.



Urbanites are slightly more receptive.

Urban respondents ranked asynchronous visits 17th—four and five spots higher than rural and suburban respondents, respectively. A similar trend held true for webcam visits.



Parents rank webcam visits higher.

Respondents with children under age 18 ranked webcam visits 18th. That's four spots higher than people under 50 who do not have children.



▶ Appendix

Full MaxDiff Results

Full results of basic urgent care MaxDiff

Imagine you woke up with a fever and a sore throat. You want to get care, but the place you normally go for care (if you have one) is closed today. When choosing where you would go for care instead, which of these five characteristics is most important to you, and which is least important?

National Rank	Attribute	Average Utility
1	I can walk in without an appointment and be guaranteed to be seen within 30 minutes	15.48
2	I can walk in without an appointment and be guaranteed to be seen within an hour	8.92
3	If I need lab tests or X-rays, I can get them done at the clinic instead of another location	8.78
4	I can get an appointment for later today	6.68
5	I will be treated by a doctor instead of a nurse practitioner or physician assistant	6.54
6	The clinic is open 24/7	6.34
7	The clinic is open on weekends	3.88
8	The clinic staff will coordinate any follow-up care I need, like scheduling appointments with specialists and sending them my health record	3.63
9	The clinician explains possible causes of my illness and helps me plan ways to stay healthy	2.88
10	It will take me 10 minutes or less to travel to the clinic	2.62
11	The clinic is open on weekday evenings	2.47
12	The clinic has the highest patient satisfaction survey scores of the options	2.41
13	The clinic charges me less than other options in my area	2.24
14	If I need a prescription, I can get it filled at the clinic instead of another location	2.24
15	Before my visit, I can get a personalized price estimate that takes my insurance into account	2.12
16	The clinic has the latest, cutting-edge technology	1.82
17	The clinic's quality scores are in the top 10% for my area	1.80
18	Another doctor recommends the clinic to me	1.72
19	I can call ahead, and the clinic staff will call or text me before it's my turn	1.55
20	I can submit an email about my symptoms and someone will email me back with a treatment plan	1.54
21	I will be treated by a nurse practitioner or physician assistant instead of a doctor	1.52
22	I can schedule an appointment online or on a mobile app	1.47
23	I can view my lab test results and health records online	1.43

Continued on next page

Full results of basic urgent care MaxDiff, continued

National Rank	Attribute	Average Utility
24	The clinician encourages me to ask questions about my illness	1.43
25	A clinician can diagnose and treat me via webcam if I don't want to come to the clinic	1.40
26	Of my options, the clinic has the best online reviews from past patients (on Yelp, Google, etc.)	1.16
27	If I have more questions after my visit, I can email the clinician	1.16
28	A friend or relative recommends the clinic to me	1.15
29	The clinic has state-of-the-art amenities, modern décor, and looks like a nice spa	1.14
30	The clinic focuses on serving patients my age	1.07
31	I can pay my bill online	0.79
32	The clinic is in the building where I work	0.62

Related resources

More survey results from the 2019 Primary Care Consumer Choice Survey



Consumer Preferences for Primary Care Clinics

Research report – available on advisory.com/newclinic

Learn what 3,000 consumers told us is most important to them when they choose a new primary care clinic.



2019 Updates in Primary Care Consumer Preferences

Research report – available on advisory.com/primarycaresurvey

Explore changes in consumer preferences for primary care between our 2014 and 2019 consumer choice surveys.



Pediatric primary care: A guide to parents' preferences

Infographic – available on advisory.com/yourmarket

Learn about caregivers' top priorities when choosing where to take their child under age 18 for a standard sick visit.

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