MARKET INSIGHTS

6 insights on consumer preferences in healthcare

Consumers weigh several priorities, including access, convenience, cost, quality, and experience, when deciding where — or if — to seek care. As care providers compete on these priorities, here is a snapshot of the status quo from which they'll need to differentiate themselves.

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Audience

- Hospitals and health systems

Advisory Board

The state of the consumer experience today

JLL conducted a national survey in 2023 of over 4,000 U.S. healthcare patients to uncover current healthcare consumers' behavior. This report explores the current consumer mentality and new emerging trends and preferences.

A new access standard

According to JLL's 2023 survey, patients waited less than two weeks for an appointment with a provider, on average. Fifty-nine percent of primary care patients waited less than a week for an appointment. To get to their appointments, 79% of patients traveled less than 30 minutes, and 40% traveled less than 15 minutes. When at an appointment, 80% of patients waited less than 30 minutes to see a provider.

Underutilization remains a challenge and furthers health inequalities

Twenty-two percent of surveyed respondents did not seek medical care within the last year. Access challenges were not evenly distributed: uninsured patients and rural patients were less likely to have accessed care than their counterparts. When people cannot access care appropriately, this leads to worsened healthcare inequalities and outcomes.

Outpatient behavioral healthcare utilization is low, too. Twenty percent of adults in the United States live with a mental illness, yet only 10% of respondents reported receiving behavioral healthcare services. Older generations are the least likely to seek outpatient behavioral health services.

Initial draw and loyalty factors shape care decisions

Most patients do not rely on a referral to guide their point-of-care decisions. A strong referral strategy is still important, but healthcare leaders need to find a way to directly appeal to consumers to capture the 46% of specialty care patients, 39% of inpatient care or surgery patients, 35% of outpatient behavioral health patients, and 53% of outpatient surgery patients who are self-referring for care.

Source: "2023 Patient Consumer Survey," JLL, June 2023; "About Mental Health," CDC.

The insights

SECTION	INSIGHT
01	**Access is the #1 differentiator.**
02	**Retail clinics are uniquely poised to deliver on convenience.**
03	**Gen Z is more apt to visit urgent care than a primary care physician.**
04	**Telehealth’s growth opportunity lies with repeat users.**
05	**Convenient access and navigability are table stakes.**
06	**Enhanced communication can alleviate dissatisfaction.**

Source: “2023 Patient Consumer Survey,” JLL, June 2023.

01 Access is the #1 differentiator

What's happening?

Most consumers value a smooth care experience over luxurious one. Healthcare leaders should prioritize a facility's accessibility — including its affordability, location, and convenience — over its newness. In 2023, three of the top five factors consumers used to choose where to seek care had to do with access, cost, location, and convenience. For example:

- 80% of primary care respondents ranked insurance coverage in their top five considerations of where to go for care
- 80% of survey respondents prioritized a facility's proximity over its newness
- 66% of preventative care respondents and 64% of specialty care respondents ranked wait time to appointment as one of their top five decision factors when seeking care

So what?

To adjust to this preference, healthcare companies need to focus on facilitating a convenient, smooth patient experience with both facilities and processes that are easy to navigate. Healthcare facilities should focus on reducing wait times and bringing care closer to patients instead of improving the aesthetics of their facilities.

Next steps

There are many ways to improve patient accessibility and provide a seamless care experience. Possibilities include:

- Creating intuitive navigation instructions and utilizing online check-in capabilities
- Offering convenient locations
- Using your website to make it easy it easy to compare wait times at different sites within your network
- Using advance practice providers (APPs) and other care team members at top-of-license
- Flexing clinic scheduling to match peak consumer demand (ex. closing on Friday afternoons and instead opening Saturday mornings)

All these examples are ways healthcare organizations can invest in improving accessibility and convenience.

Source: "2023 Patient Consumer Survey," JLL, June 2023.

02 Retail clinics are uniquely poised to deliver on convenience

What's happening?

Convenience takes many forms to consumers, including ease of scheduling, access, and integration with the rest of their lives. For example, 58% of survey respondents made additional stops at places like restaurants, grocery stores, or pharmacies during their trip to a primary care doctor. This proclivity to tie medical visits in with other errands presents a unique opportunity for retail clinics. By offering medical services and a pharmacy inside a retail store, and often close to other retailers, these companies have a value proposition that speaks to many convenience-seeking consumers and that drives foot traffic through their retail sections. Seventy-two percent of respondents said they'd consider visiting retail clinics in the future, and younger consumers were particularly receptive to utilizing alternative care sites, such as retail clinics.

So what?

To increase their volumes, healthcare providers can take a lesson from retail clinics and strive to offer walk-in or same-day care that is conveniently situated near patients' homes, workplaces, or places where they run errands.

Next steps

Health systems and primary care groups should consider partnering with retail clinics to cater to convenience-seeking consumers. If this is your strategy, make sure that you are integrating these sites into your care network and sharing data across sites to improve continuity of care. Alternatively, primary care providers can compete with retail clinics on the basis on convenience and access. There are still a lot of consumers who have never used a retail clinic, suggesting that a primary care office that offers same-day or walk-in appointments close to consumers might outcompete a retail clinic.

For retail clinic operators, partnering with hospitals and physician groups to leverage their brand may help appeal to consumers who have never used a retail clinic before.

Source: "2023 Patient Consumer Survey," JLL, June 2023.

03 Gen Z is more apt to visit urgent care than a primary care physician

What's happening?

Older patients are more likely to report having a relationship with a traditional primary care physician (PCP) than younger patients. For example, 70% of baby boomers report having a PCP, and only 16% utilize urgent care. Conversely, Gen Z and millennials report the lowest utilization of primary care but the highest utilization of emergency and urgent care. These younger generations exhibit less brand loyalty and instead tend to evaluate the range of options available to them as individual care needs arise.

So what?

Provider organizations that want to compete for younger, commercial patients need to find new ways to attract Gen Z and millennials. To help these patients mitigate long-term health risks, providers may need to rethink when and where preventive care is offered, or how they hardwire connections from urgent care and retail clinics to primary care offices. Providers will need to make the care navigation process easier to meet younger patients where they are, educate them about the services they may need, and connect them to those services when they are ready.

Next steps

Organizations should consider promoting preventive care within urgent care settings by integrating these sites into the broader healthcare system and establishing referral networks to PCPs. This can include co-locating urgent and primary care or flexing staff across the sites to promote patient awareness.

Recognizing that cost can be a concern for younger individuals seeking care, organizations should enhance price transparency and financial navigation services. Many patients are more concerned with providers being up-front about prices and payment options than finding the rock-bottom price in a market.

Another strategy to attract younger consumers is incorporating or co-locating amenities within healthcare facilities. Eighty percent of Gen Z expressed a desire for facilities with additional amenities such as alternative medicine or restaurants, and 72% of Gen Z and millennial respondents visited an additional location during their trip to the doctor. If all else is equal, locations near popular stops like gyms and pharmacies may have an advantage in appealing to younger customers.

Source: "2023 Patient Consumer Survey," JLL, June 2023.

04 Telehealth's growth opportunity lies with repeat users

What's happening?

The convenience afforded by telehealth makes it a popular option: 71% of survey respondents want telehealth options. Follow-up visits, primary and preventive care, behavioral health and counseling, and initial consultations were the top uses for telehealth in 2023.

Since its peak during the pandemic, telehealth utilization has dropped off and plateaued, but utilization remains high. In 2022, 45% of surveyed respondents report having used telehealth in the past six months; in 2023, that number had only dropped to 42%. This data suggests that the audience using telehealth options isn't expanding significantly; instead, utilization is likely driven by repeat telehealth users.

So what?

Focus on driving deeper utilization among repeat users of telehealth rather than prioritizing new-user acquisition. Telehealth utilization may increase as millennials and Gen Z age and accrue more care needs, but for now, the easier growth opportunity is in teaching patients that telehealth can be a regular part of their care pathway or ongoing care, rather than a one-off novelty.

Next steps

Drive deeper telehealth utilization by creating new patient pathways for individuals who are comfortable receiving care virtually. Identify telehealth users and work to shift them into these pathways through conversations with clinicians and with marketing materials and patient testimonials.

Additionally, since 29% of respondents reported that their virtual visit resulted in an in-person experience, providers must build "off-ramps" to move patients quickly to in-person care and keep telehealth users satisfied. These patients likely chose you because your telehealth offering was the quickest available option. So, when a virtual visit needs to shift to an in-person interaction, helping those patients get seen quickly will be key to convincing them to return to a telehealth visit for their next appropriate care need.

Source: "2023 Patient Consumer Survey," JLL, June 2023.

05 Convenient access and navigability are table stakes

What's happening?

When it comes to patient satisfaction, meeting baseline expectations isn't enough. Among respondents who said they had a "positive" care experience, 85% to 91% said they thought the location was convenient, parking was easy, and they could easily get where they needed to go. But most patients who had a negative experience agreed with all those statements, as well. This suggests that attributes that were once differentiators for providers — their location, parking, and navigability — are table stakes now. Providers who can't deliver on those baseline expectations risk disgruntled patients who won't return, and providers who compete on patient experience must go beyond these new basics.

So what?

To enhance customer loyalty, healthcare facilities must seek feedback from their patients regarding ways to enhance their experience. Providers should not only collect this feedback but also take prompt action to implement the suggested changes. Transforming service failures into service recovery successes requires healthcare leaders to ensure that dissatisfied patients feel acknowledged and that their concerns are swiftly addressed. This approach to hospitality demands a more comprehensive and ingrained strategy than simply relying on a suggestions box.

Next steps

To ensure patients feel heard and that your organization learns from patient feedback:

1. Make it easy to collect in-the-moment feedback. Gather enough information, but don't overburden the patients.
2. Empower staff to quickly resolve issues that arise. Equip all staff to address common issues (ex. long waits for a clinician, Wi-Fi connections, cold rooms or food), even if these issues aren't an individual's responsibility. Staff may not be able to fix an issue (ex. clinician delays), but knowing to repeat back the patient's concern, apologize, provide information, and offer interim solutions can go a long way in helping patients feel heard.
3. Develop a process that evaluates trends and identifies opportunities to make big-picture improvements. Provider organizations should have a mechanism for collecting feedback and analyzing response data to make broader improvements in the care experience.

Source: "2023 Patient Consumer Survey," JLL, June 2023.

06 Enhanced communication can alleviate dissatisfaction

What's happening?

Survey respondents gave emergency departments (EDs) a net promoter score (NPS) of -3.[1] Comparatively, urgent care had an NPS of 21; outpatient surgery, 37; specialty care, 42; and office-based primary care, 48.

While a low NPS for the ED isn't surprising (emergency care inherently is not an experience most people would recommend), a score so significantly below those of other sites of care suggests that the ED experience — and, in particular, the hallmark long waits — are major patient dissatisfiers.

So what?

Customer loyalty may not be a top priority for EDs, but patient experience still matters: the ED is a front door to the rest of the health system. Tactics that reduce wait times, such as preregistration triage, near-site urgent care, and flexible staffing models, can improve patient experience. But wait times aren't the only critical variable: perception about wait times is also important, and generally easier to improve than wait times themselves. Transparency and frequent updates help patients understand the unpredictable nature of ED triage while giving them something more tangible to focus on than an uninformed wait. "Attentiveness of staff" was the largest differentiator between patients who had positive and negative experiences in the ED. And that attentiveness, in the form of wait time transparency, can start before the patient is seen.

Next steps

There are three things to consider to improve patient experience in the ED:

1. Leverage your network to offer urgent care, virtual visits, or in-office appointments for inappropriate or low-acuity patients presenting in the ED. This can alleviate some wait time pressure while keeping patients and revenue in network.
2. Increase transparency about wait times before a patient arrives. Publish current average wait times across sites in your network on your website, along with guidance about the types of conditions addressed at different locations, to promote in-network "shopping" among lower-acuity patients.
3. Communicate wait times in the ED waiting room using a monitor or your facility website, and provide frequent updates after triage. Consider offering buzzer or text updates to lower-acuity patients who may want to wait outside or in their car. Have staff personally explain unforeseen delays where appropriate.

1. Net Promoter Score (NPS) is a customer experience metric that measures loyalty and is predictive of business growth. NPS is calculated by asking an initial survey questions on a 0-10 rating scale. Then, the accumulated ratings are graded as one number between -10 and 100.

Source: "2023 Patient Consumer Survey," JLL, June 2023.

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