

Consumer insights that drive patient loyalty



What consumers want from their healthcare experience is in transition. Emerging technologies and tools like artificial intelligence (AI), automation, and advanced analytics are redefining what's possible, leaving some consumers eager for innovation and others favoring traditional care approaches.

Huron's longitudinal research tracks evolving consumer preferences and identifies the latest consumerism trends influencing healthcare. Market insights surface opportunities for health systems to improve care quality, increase patient loyalty, and strategically integrate digital tools and technology to elevate the consumer experience.

WHO WE SURVEYED

3,000

U.S. healthcare consumers

Consumers value quality and affordability

Consumers rate high-quality care and affordability as most important to their healthcare experience.



49% identify high-quality care, including effective treatments, access to skilled professionals, and positive outcomes, as most important to their healthcare experience.



For 30%, affordability, including reasonably priced services and transparent billing, is most important to their healthcare experience.



While consumers indicate that high costs are the greatest barrier to accessing healthcare, 32% are willing to pay more for exceptional quality of care and outcomes.

Consumers are evaluating care and providers differently, challenging healthcare organizations to formulate customized strategies across the care continuum to keep patients within their network.

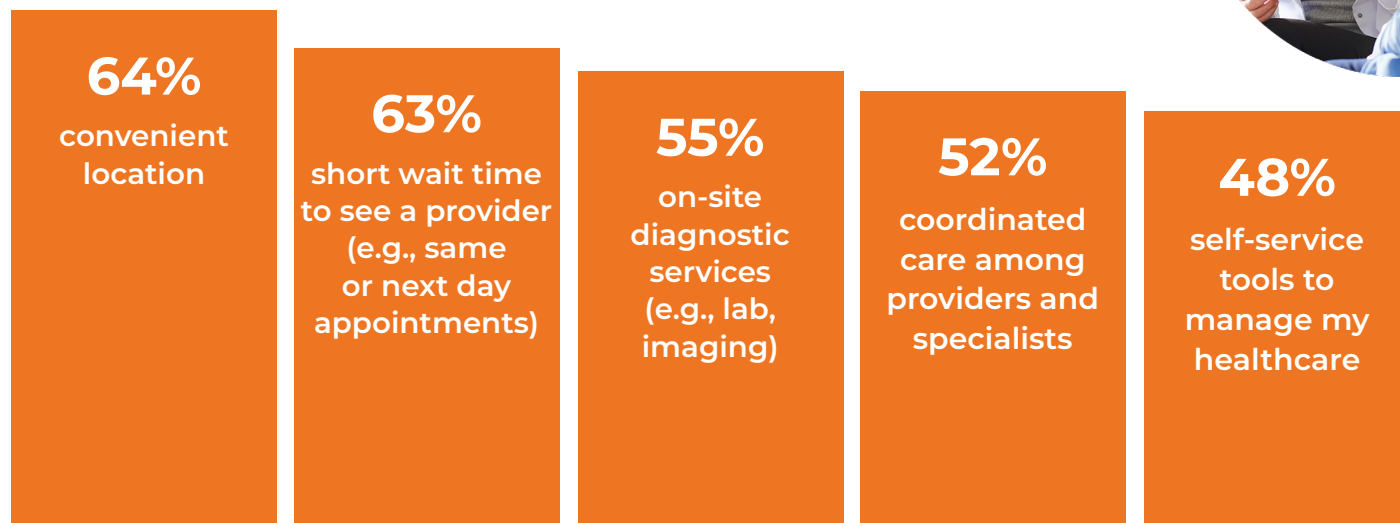
The ideal healthcare experience, defined by consumers

In addition to quality and affordability, convenience and personalization are key drivers of consumer choice and perception of their healthcare.

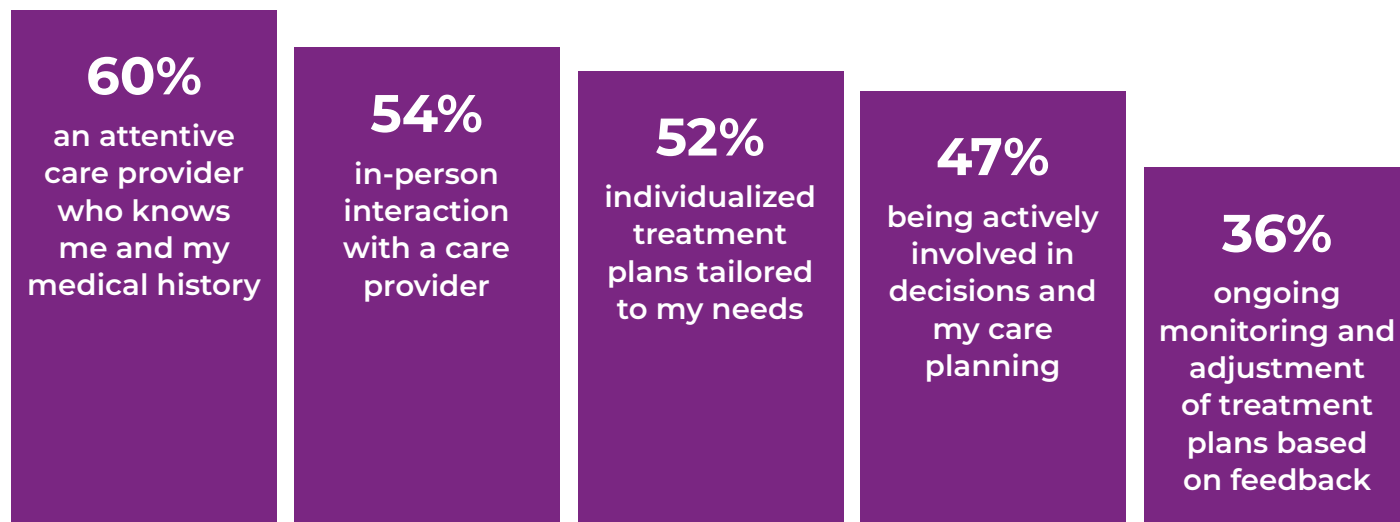


What's important to consumers:

Convenience



Personalization



75% of healthcare consumers are satisfied with the care they received in the last 12 months.

The shifting role of digital tools and services in patient care

The interplay of in-person and virtual care remains complex. While 70% of consumers say they prefer to receive care in person, 84% cite virtual care offerings as important.

Overall, healthcare consumers' comfort with technology and digital preferences varies, but adoption continues to increase.

Digital apps and devices

Nearly half of consumers report using apps at least once a week to manage their health and wellness.

Top 5 digital apps and devices used:



Online portals or mobile apps for scheduling appointments and accessing medical records - **44%**



Text with physician offices to manage appointments - **28%**



Apps for tracking fitness and exercise - **41%**



Telehealth or virtual visit services - **28%**

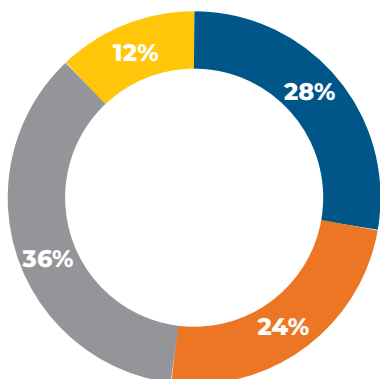


Wearable devices that track fitness or exercise - **35%**

Artificial intelligence (AI)

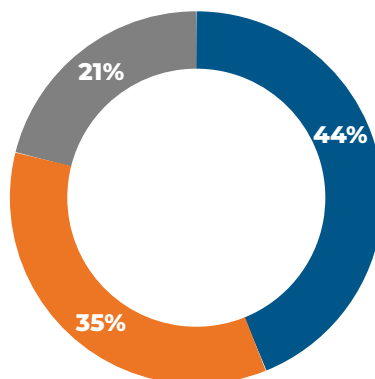
Consumers are interested in leveraging AI systems for medical advice and recommendations, but hesitation remains.

Would you be interested in AI-powered chatbots to receive immediate, 24/7 medical advice?



- Yes, I would be interested and comfortable
- Yes, I would be interested but have some hesitation
- No, I would prefer speaking with a healthcare professional
- I'm unsure

Would you be comfortable with AI analyzing your health data to provide personalized treatment plans?



- Very/somewhat comfortable
- Very/somewhat uncomfortable
- Neutral

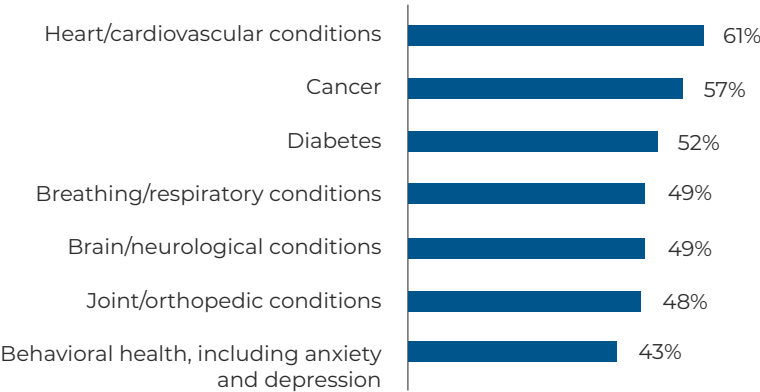
The shifting role of digital tools and services in patient care (continued)

Data and disease prediction

Consumers are more open to sharing their physical health information with providers, including medical history, test results, and biometric data, for lower cost of care and better health outcomes. Willingness to share data dramatically declines for mental health, genetic, lifestyle, and behavioral information.

As more consumers show interest in sharing personal data to predict health conditions, data privacy and security and clear communication on how patient data will be used are needed to obtain essential information to improve [disease prediction](#) accuracy.

Consumer interest in using personal data to predict risk for:



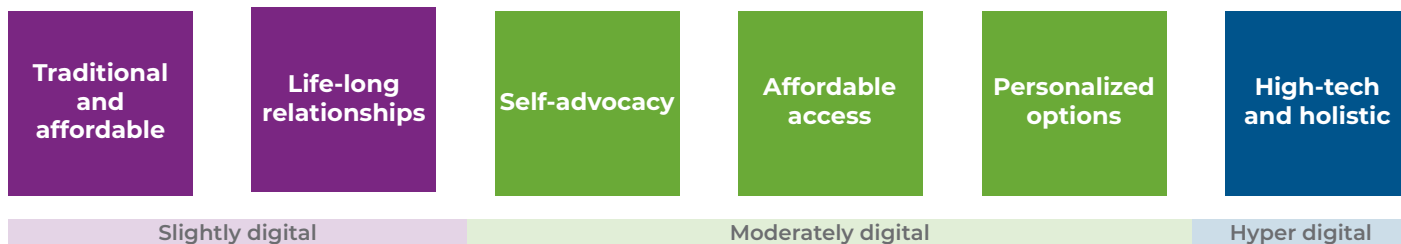
70% of consumers experience anxiety when visiting a healthcare provider, primarily driven by fear of bad news and affordability concerns.



Understanding the modern healthcare consumer

Consumer trends provide a pulse on how healthcare consumption is changing. Personalizing healthcare experiences to meet the needs of your consumers starts with understanding the nuances that influence their choices, perceptions, and loyalty.

From Huron's survey, six consumer segments emerge, revealing distinct differences in attitudes, preferences, and digital aptitude.



Traditional and affordable

I'm seeking an in-person healthcare experience that is quick and easy with minimal use of technology.



I engage with health services 1x/year.



Slightly digital



Affordable access

I'm seeking an affordable and convenient healthcare experience with access to a diverse mix of providers and specialists.



I engage with health services 2-3x/month.



Moderately digital



Life-long relationships

I'm seeking a consistent healthcare experience built on relationships with providers whom I know and trust.



I engage with health services 2-3x/year.



Slightly digital



Personalized options

I'm seeking a personalized healthcare experience that allows me to choose my preferred care options.



I engage with health services 2-3x/month.



Moderately digital



Self-advocacy

I'm seeking a healthcare experience where I'm actively involved in care decisions and have open communication with my provider.



I engage with health services 1x/month.



Moderately digital



High-tech and holistic

I'm seeking a digital-first healthcare experience where I can use digital apps to manage my health daily.



I engage with health services 1x/week.



Hyper digital

Cost tops care access challenges



Consumers identify several obstacles to accessing quality care. These barriers contribute to health inequities, hinder growth potential, and incentivize patients to seek care outside your network.

Greatest barriers to care:

- High healthcare costs and out-of-pocket expenses
- Long wait times for appointments
- Limited availability of appointment times that fit my schedule
- Difficulty finding high-quality healthcare providers
- Fear or anxiety about seeking medical care

3 ways to influence the consumer experience and build loyalty

By understanding how consumer trends are shifting and using insights specific to the populations they serve, healthcare leaders can build personalized care pathways and strengthen connections that generate loyalty and attract new patients.



Three actions organizations can implement today:

01 Provide easier access to care



Nearly half of consumers rely on referrals from primary care physicians and healthcare professionals when choosing where to go next for care, followed by recommendations from friends or family (31%) and online reviews and ratings from other patients (26%).

Healthcare organizations can provide a more seamless experience by strengthening relationships with in-network providers, prioritizing self-service digital tools to guide consumers' care decisions, and using data to strengthen [physician referral management](#) programs, which drive patient retention and volume.

02 Create relevant, timely communications



With cost surfacing as the greatest barrier to care and a primary source of patient anxiety, upfront communication about the cost of services and patient financial planning resources are needed to eliminate access barriers and improve the patient financial experience.

Understanding communication preferences and engaging with consumers on their preferred channels can boost patient engagement, reduce anxiety, and improve the patient-provider relationship. Leaders are investing in customer relationship management (CRM) platforms and emerging technologies such as AI and automation to personalize communication, improve the visibility of [consumer touchpoints](#), and reduce manual effort.

03 Balance digital investments



Virtual care and digital tools are becoming increasingly influential in consumers' healthcare choices. Nearly 60% of consumers surveyed were classified as moderately or hyper-digital based on their usage and preferences for digital tools and services.

In other [research from Huron](#), healthcare leaders indicate digital apps and health tools for consumers are core to their digital transformation strategies. Investments should be analyzed to ensure they match the demands of an organization's consumer base while keeping emerging preferences in mind.



Talk to an expert

Connect with a Huron expert today to evolve your healthcare consumer strategy and put what's possible into practice.

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