

What Today's Healthcare Consumers Expect

Research highlights evolving consumer trends and insights in healthcare



Consumers' opinions about their healthcare are stronger than ever, and increased economic pressures, workforce constraints, and competition are affecting how patients and families choose providers and perceive their care.

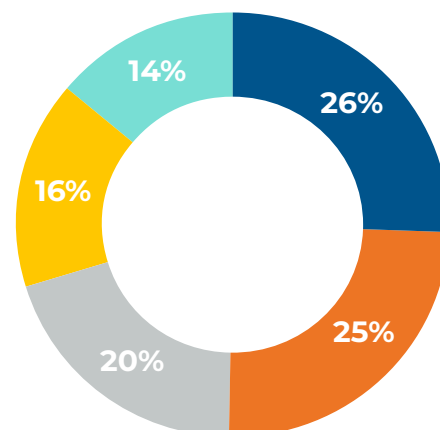
Huron's longitudinal research tracks evolving consumer preferences and identifies the latest consumerism trends influencing healthcare. These insights reveal opportunities for health systems to generate better care experiences and outcomes that attract and retain patients.

Today's Healthcare Consumer




In Huron's recent survey of 1,500 U.S. healthcare consumers, **five consumer segments emerged based on a combination of attitudes and preferences** that drive their healthcare choices. These segments reveal distinct differences in how **satisfaction, quality, convenience, and personalization influence consumer choice and perception.**

Healthcare Consumers By Segment

- Digitally Inclined
- Me-Focused
- Attention- and Outcomes-Driven
- Time- and Money-Oriented
- Results-Focused



5 Types of Healthcare Consumers

I am ...	I choose healthcare based on ...
 Digitally Inclined	Fast service enabled by digital tools; I do not mind feeling like a number.
 Me-Focused	Personal attention; I care about receiving personalized treatment in a timely manner.
 Attention- and Outcomes-Driven	High-value care; I'm open to digital tools, especially if it enhances the personalization and accuracy of my treatment.
 Time- and Money-Oriented	Cost and convenience; I want fast, affordable service and don't want to go out of my way to receive care.
 Results-Focused	Positive outcomes; I want a doctor I can trust who can help me achieve better results without regard to cost.

How can healthcare organizations meet the needs of today's consumers?

Huron's research surfaces four actions healthcare organizations can take to respond to shifting consumer preferences and deliver a superior care experience.

Provide Greater Digital Functionality

- **Virtual care:** Consumers continue to seek telehealth services and are happy with their experience. In the last year, 75% of consumers say they've participated in a virtual visit. Of those individuals, 84% are satisfied with their telehealth experience, a 12% increase since 2021.
- **Mobile apps:** More than two-thirds of consumers want a mobile app for their healthcare information needs, such as scheduling appointments, checking results, and paying for care, compared to just over half of consumers in 2021.
- **Wearables:** After a significant increase in 2021, the percentage of consumers using wearable devices to track health-related data holds steady at 53%. Less than half of those individuals report sharing this data with their physicians. Yet, 73% of consumers overall say they would use a wearable device to report health data to their care provider as part of a treatment plan. This presents an opportunity for providers to personalize care to their patient's health needs.

Understand Drivers of Patient Satisfaction to Generate Loyalty and Retention

- **Trust and respect:** Consumer satisfaction with their healthcare rose from 74% to 79% in the last year. Yet, 70% of consumers would be willing to try a new provider for deeper trust and respect.
- **Lower costs and shorter wait times:** For day-to-day care, more than half of consumers would switch providers for lower costs. For those with serious medical conditions, two-thirds of patients would change providers for shorter wait times.
- **Ratings and reviews:** When consumers are looking for new providers, online quality ratings, reviews, and comparison tools are the No. 1 source of information, followed by recommendations from healthcare providers. This marks a significant shift from previous years where referrals were the primary driver.
- **Positive results:** Healthcare consumers rank accurate diagnosis and treatment plans that get results as the top driver of a satisfying and quality experience, followed by trust and respect.

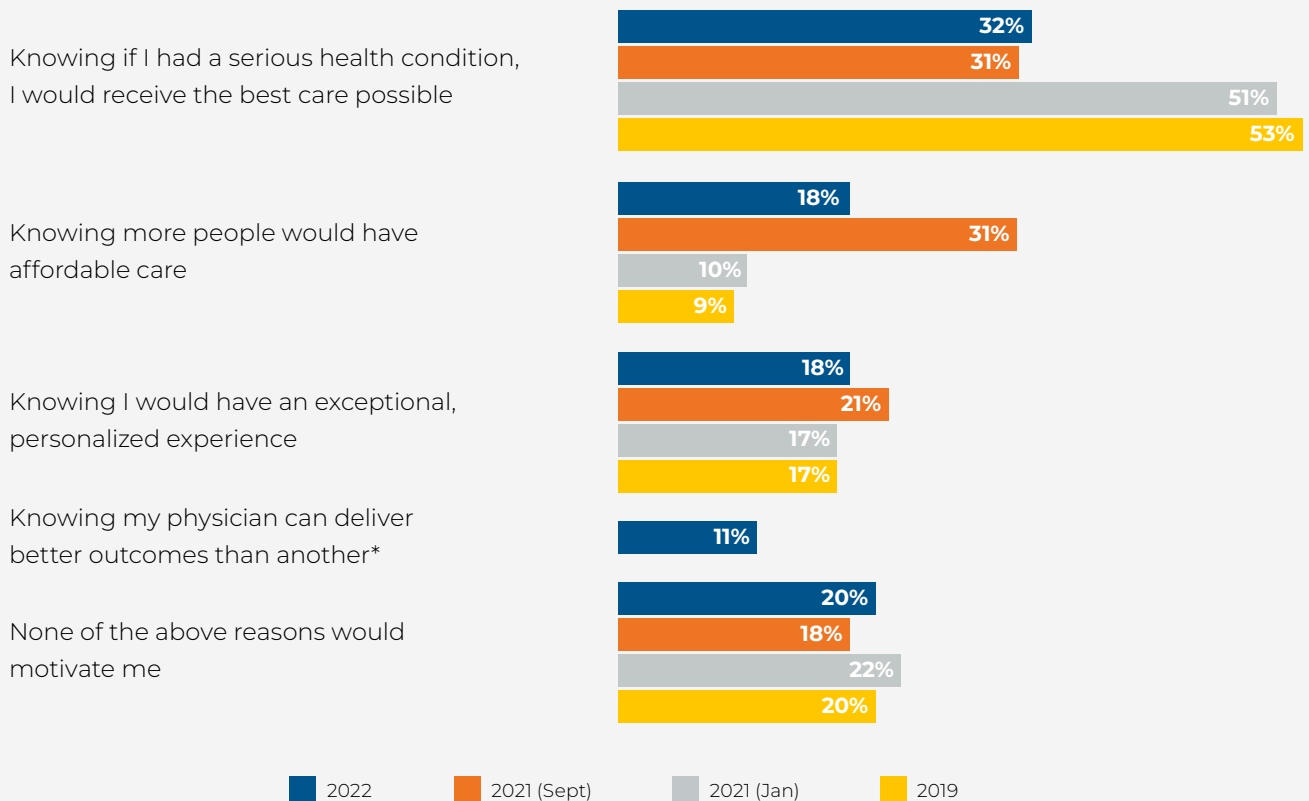
Deliver Convenience Enabled by Technology

- **Single source of information:** 83% of consumers want a single point of contact for their healthcare information needs, a 25% increase since 2021.
- **Diverse sites of care:** Healthcare consumers are increasingly looking for alternative sites of care that provide greater convenience and are supported by technology.
 - 1 **Walk-in care:** More consumers are choosing walk-in, retail, and urgent care clinics, with 23% of consumers choosing these facilities for day-to-day care, up from 19% in 2021 and 15% in 2019.
 - 2 **Virtual care:** Virtual care continues to influence provider selection. More than 50% of consumers are willing to change providers for superior virtual care offerings.
 - 3 **In-home care:** Openness to healthcare at home is also on the rise, especially among those ages 18 to 54. Overall, 70% of consumers are interested in receiving healthcare at home, compared to 56% in 2021 and 41% in 2019. While most respondents say they would prefer care at home be provided in person rather than virtually, technology is still key to a successful [acute care at home strategy](#).

Address Healthcare Affordability Concerns

- **Transparency:** Respondents cite the most serious healthcare challenge today is the ability to afford quality care. With economic conditions causing greater financial strain for many families, 80% of consumers say it's important to know the cost of a healthcare visit or treatment at the time of service. Consumers are also becoming less inclined to pay more for healthcare than in previous years.

Consumer Motivation to Pay More for Healthcare



*Data only available for 2022.

While common themes surface across all consumer segments, to best serve their communities, healthcare providers will have to gain a deeper understanding of what influences the attitudes and preferences of the individuals they serve. Leaders who use these insights to not only inform but prioritize strategic investments in how and where they deliver care will have a greater impact on patient loyalty and organizational growth.

NEXT STEPS

[Reach out](#) to our consumerism experts who can help you develop a 360-degree view of your consumers and transform your strategy.

STAY INFORMED

Sign up for Huron's latest research and insights.

[SIGN UP](#)