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Klein & Partners
2024 National Consumer Insights Study (NCIS)

Spring 2024

Background, Methodology, and Demographic Profile

INTRODUCTION

Klein & Partners has conducted an annual national online survey among consumers across a wide variety of health care topics for many years. This edition focuses on a wide range of topics from COVID-brain to primary care access challenges to AI in health care to pricing and billing to many more.

Feel free to use any of these charts and share with your colleagues. We just ask that you acknowledge **Klein & Partners: 2024 NCIS** as the source of the information.

Many of these topics have additional data available for further analysis or discussion. If you are interested in learning more, please contact us. We'd be happy to present this information or do a deeper dive on any particular 'chapter' of the research with you and your team.

Methodology

Online Survey
(device agnostic)

Fielded:
March 5 – 9, 2024

n= 1,005
+/-2.6% at the 90% CL

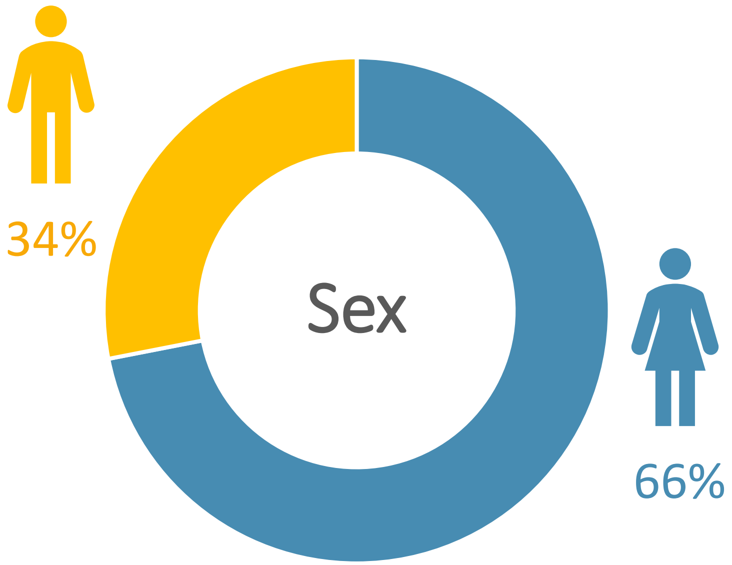
National random sample of health care decision-makers.

Note: Arrows (↑↓) and letters (e.g., A, B, C) indicate a statistically significant difference between those two data points.

Note: Results presented here represent our sample weighted to reflect Census data. See data tables for all results.

	Total	Northeast	Midwest	South	West
Weighted	1,005	174	215	378	238
Unweighted	1,005	187	199	386	233
+/- at 90% CL	2.6%	6.0%	5.8%	4.2%	5.4%

Demographic profile



37%	Married	41%
33%	College Grad	30%
24%	Responsible for child(ren)	41%
28%	Responsible for another adult	30%

Age [Average age = 48]

- Gen Z 12%
- Millennial 34%
- Gen X 25%
- Baby Boomer+ 30%
- Silent 2%

Income [Median income = $48,835]

- Less than $35K 32%
- $35 to >$100K 40%
- $100K+ 25%

Ethnicity/ Race

(Multi-response)

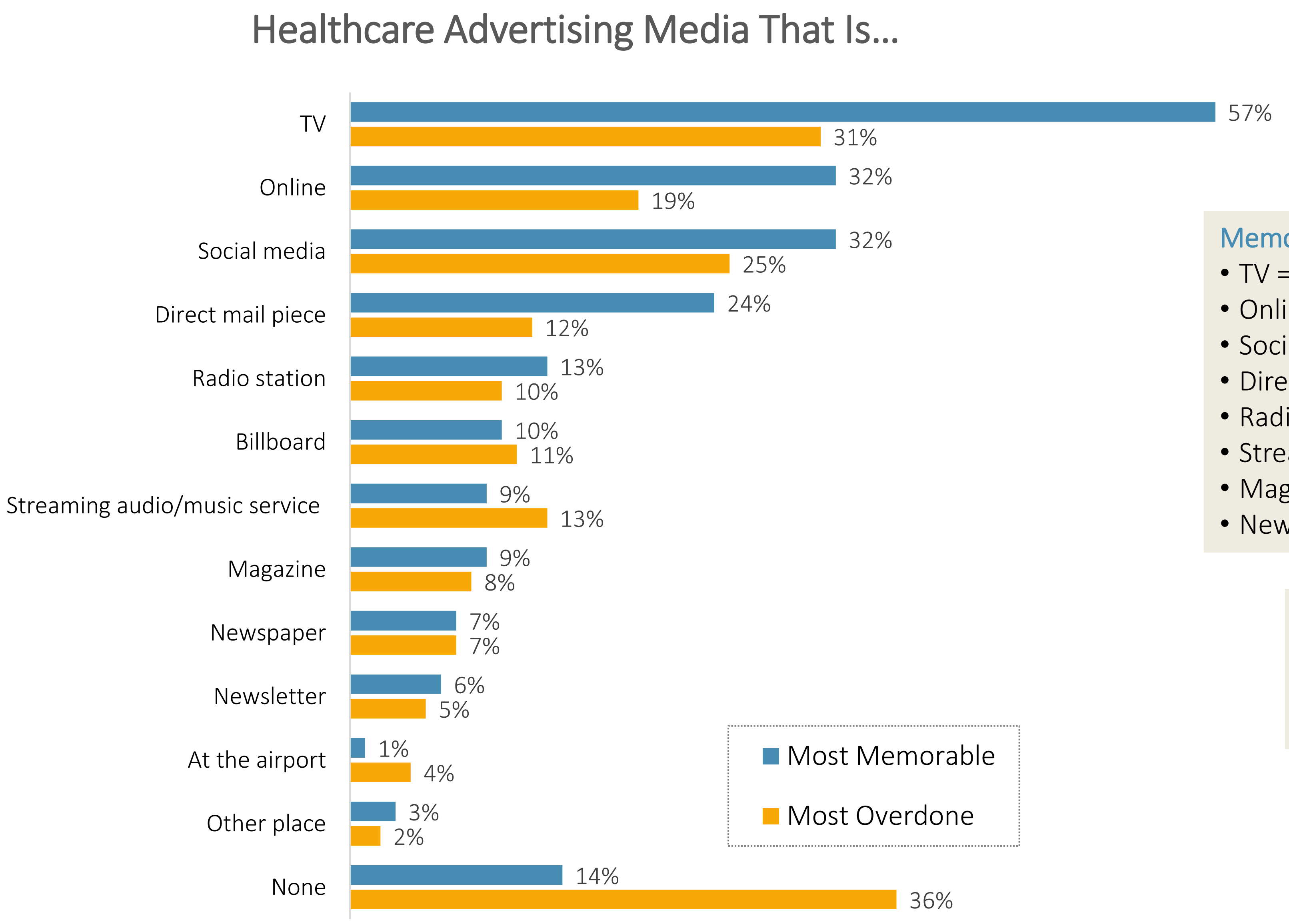
- 69% Caucasian
- 17% Hispanic
- 16% African American
- 5% Asian
- 6% Other

What did we learn?

DETAILED FINDINGS

ADVERTISING MEDIUM REACTIONS

As confirmed by world-wide advertising research, TV remains ‘the’ brand building medium



Memorable:
- TV = Men and Gen X and Boomers, Chronic and/or serious condition
- Online ads: Men, Declines with age
- Social media: Declines with age, Healthy
- Direct mail: Boomers and Silent
- Radio: Men
- Streaming audio/Music: Men, Gen Z and Millennials
- Magazines: Boomers
- Newspapers/Newsletters: Silent

Overdone:
- Gen Z are more ‘over it’ with all health care advertising mediums as are African Americans – your advertising is missing the mark with two key audiences.

Q1 When you think about different types of places where you can see, hear or read healthcare advertising, which types of ads are most memorable to you? (n=1,005)
Q2 Are there any places where you can see, hear or read healthcare advertising that you feel are overdone and tend to cancel each other out in your mind? (n=1,005)

PRIMARY CARE PROVIDER EXPERIENCES

Half of adults with a PCP have had them for less than five years

87%

Have a PCP

88% in 2023

Gen Z least likely to have a PCP at 77%

Primary care provider is:

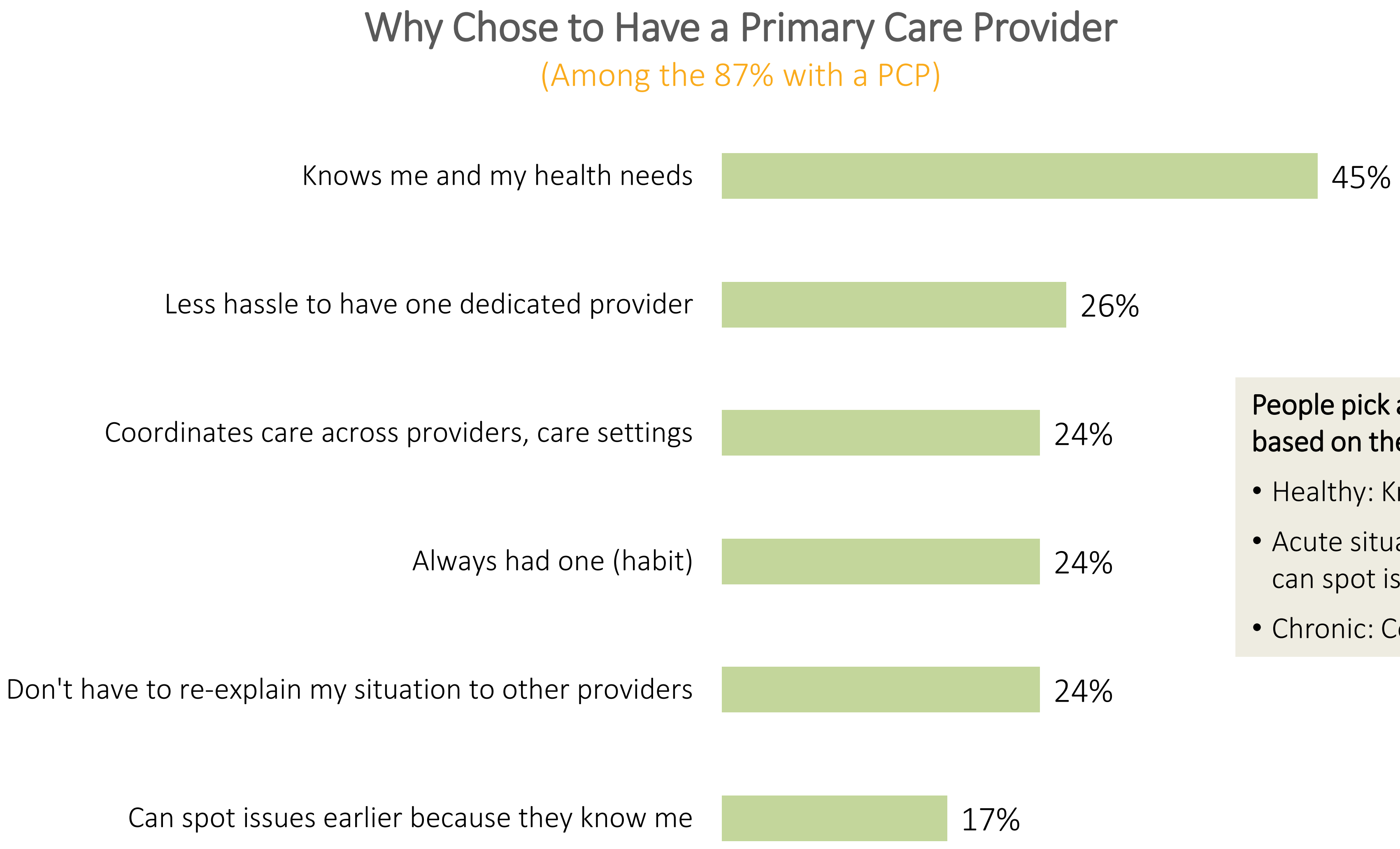
89%	Physician
5%	Nurse Practitioner
3%	OB/GYN
2%	Physician's Assistant
1%	Other

Time with PCP:

14%	Less than 1 year
16%	1-2 years
20%	3-4 years
15%	5-6 years
10%	7-9 years
22%	10 years or more

Q3 Do you have a primary care provider? (n=1,005)
Q4 Who do you consider to be your primary care provider? (n=887)
Q5 How long have you had this primary care provider? (n=887)

Patients chose to have a PCP so that provider would 'get to know them' and their health needs

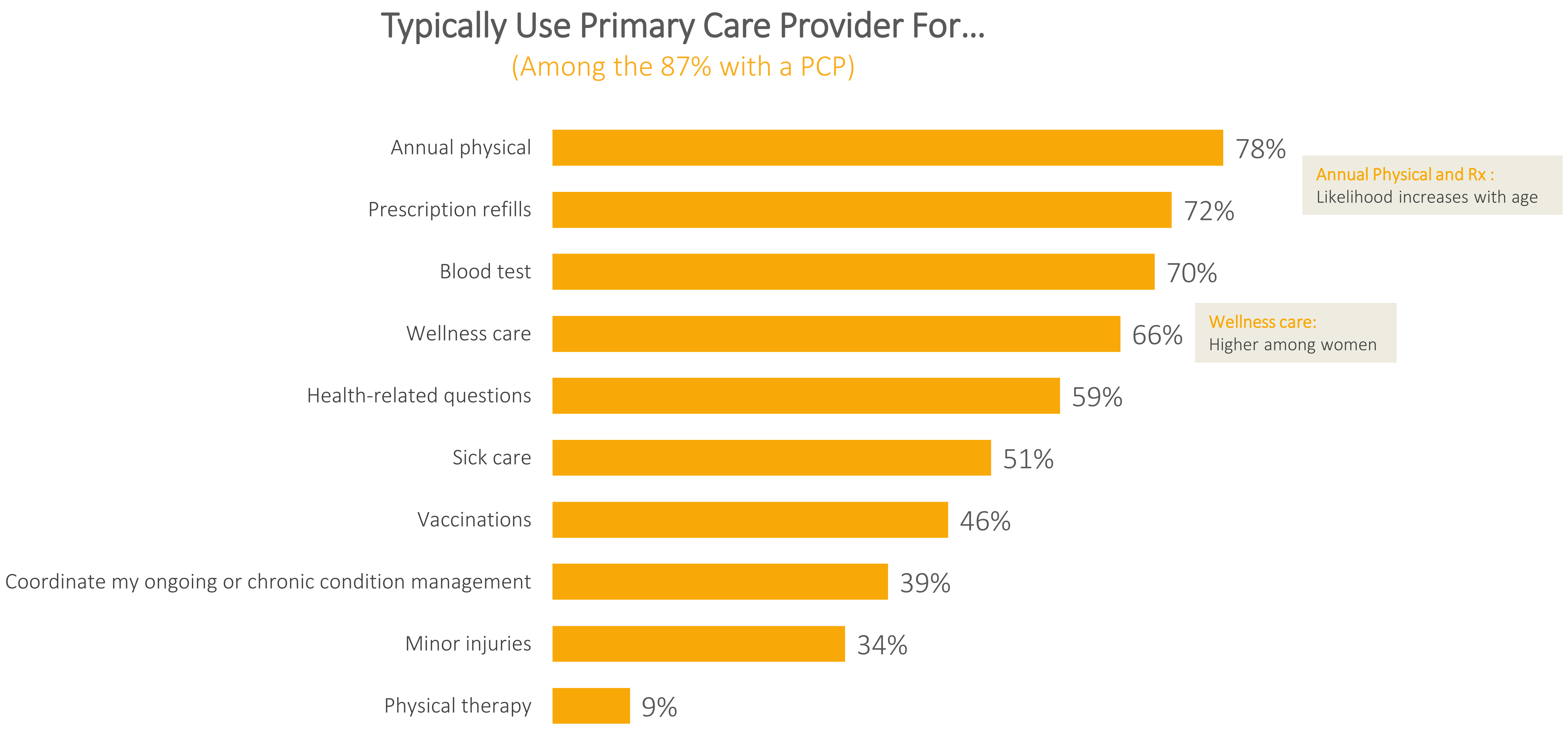


People pick a PCP for different reasons based on their health

- Healthy: Knows me, Less hassle
- Acute situation: Coordinates care, Habit, can spot issues earlier
- Chronic: Coordinates care

Q6 Why did you choose to have a primary care provider? (n=887)

Unchanged from last year, most patients use their PCP for physicals, Rx refills, labs, and wellness care; 'sick care' which we think of as the core service of a PCP continues to be way down the list – is the role of a PCP changing?

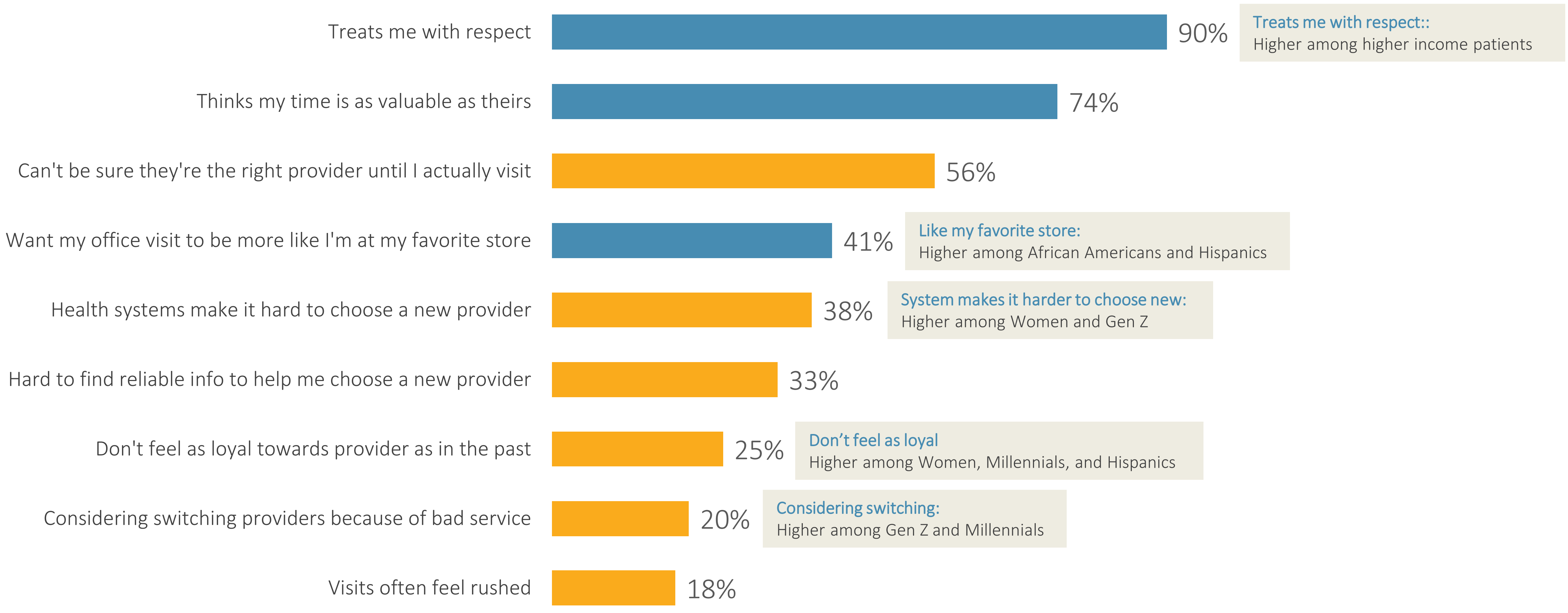


Q10 What services do you typically use your primary care provider for? (n=887)

Barriers may be suppressing PCP switching for now... but the desire is there for many, especially Millennials

Patient Agreement with Statements About Their PCP

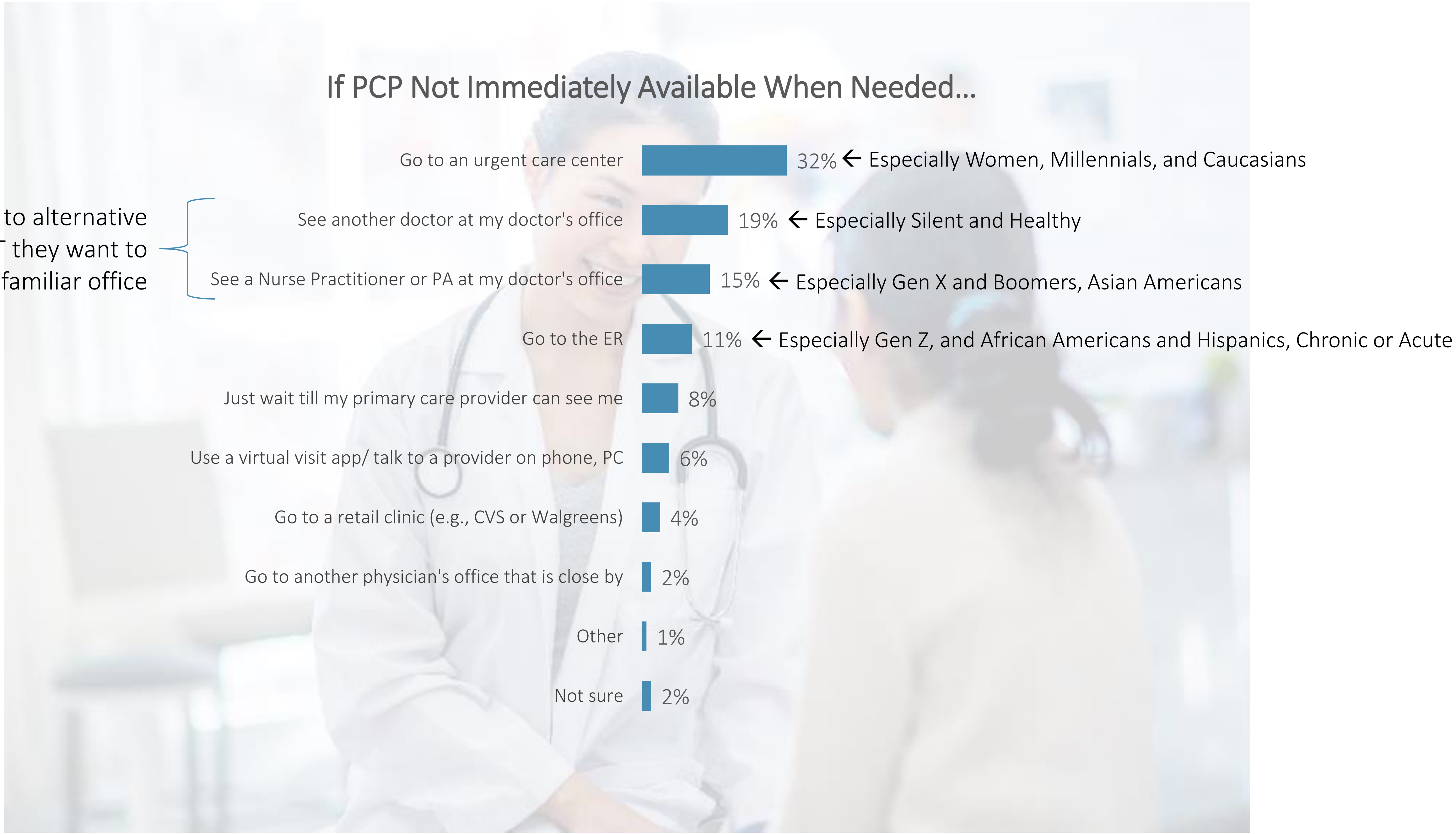
(Among the 87% with a PCP)



Q12 How much do you agree or disagree that the following describes how you FEEL ABOUT YOUR PRIMARY CARE PROVIDER?
Note: % Strongly Agree/Agree scores shown. (n=887)

Urgent care is ‘Plan B’ when “my doctor fails to see me in a timely manner” – Having a strong urgent care strategy (whether in-person or virtually) is key to providing coordinated primary care and keeping people out of the ER

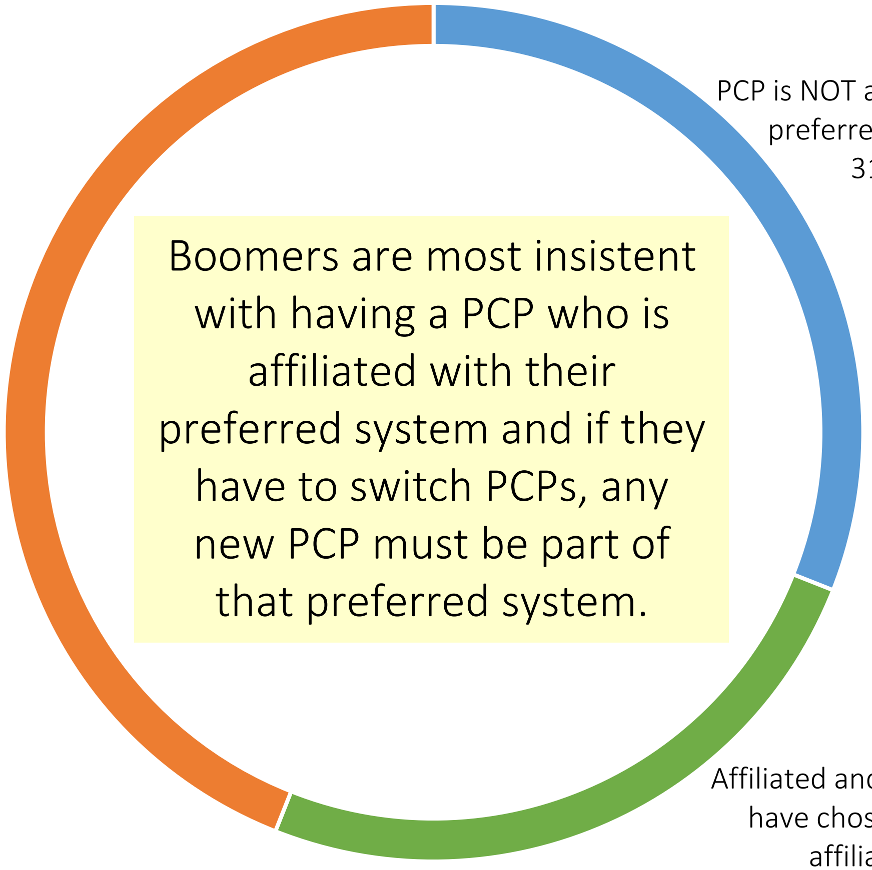
Patients are open to alternative provider types BUT they want to stay at their familiar office



Q11 If you were sick and your primary care provider could NOT see you quickly, what would you do instead? (n=887)

Most patient's PCPs are affiliated with their preferred health system and for many that was a deal maker/breaker

Importance of PCP Affiliation with Preferred System

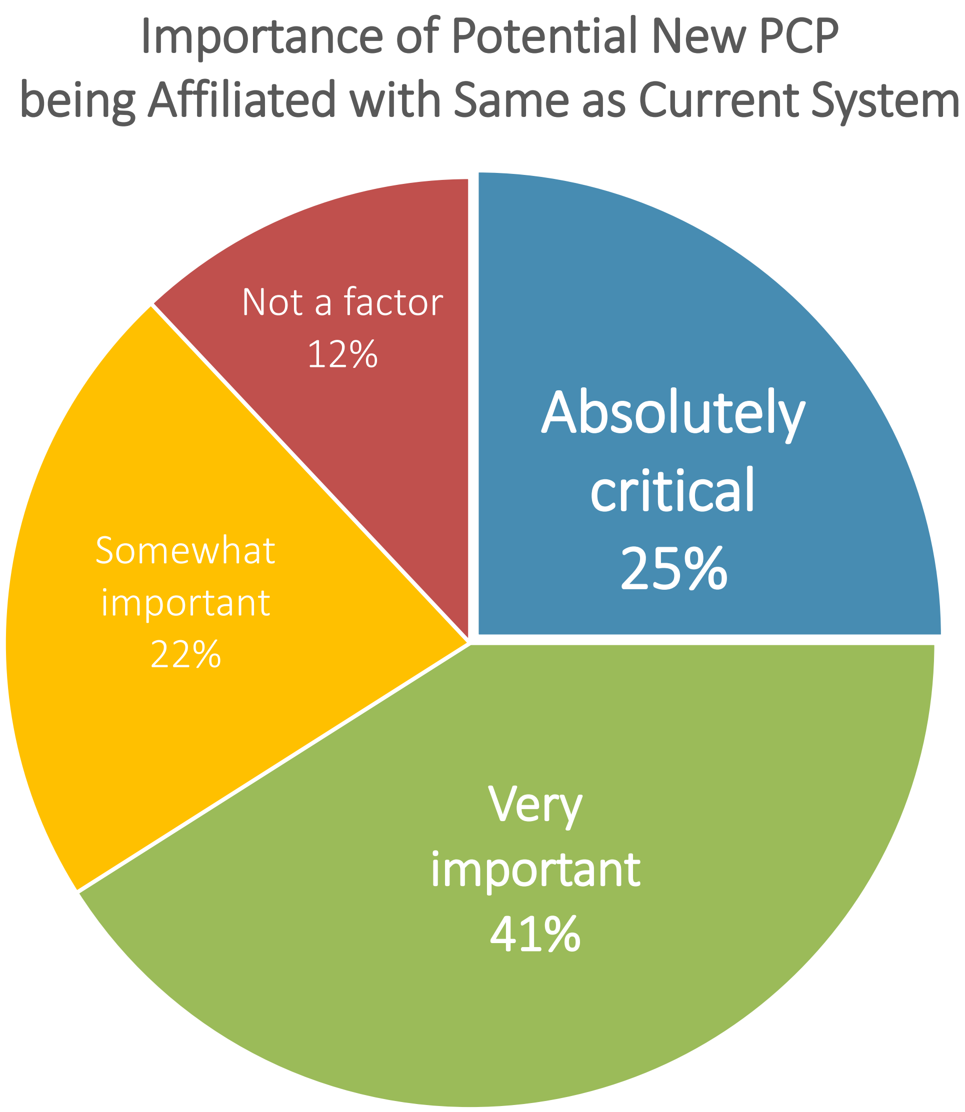


Boomers are most insistent with having a PCP who is affiliated with their preferred system and if they have to switch PCPs, any new PCP must be part of that preferred system.

Gen Z and Millennials ↑
African Americans and Hispanics ↑

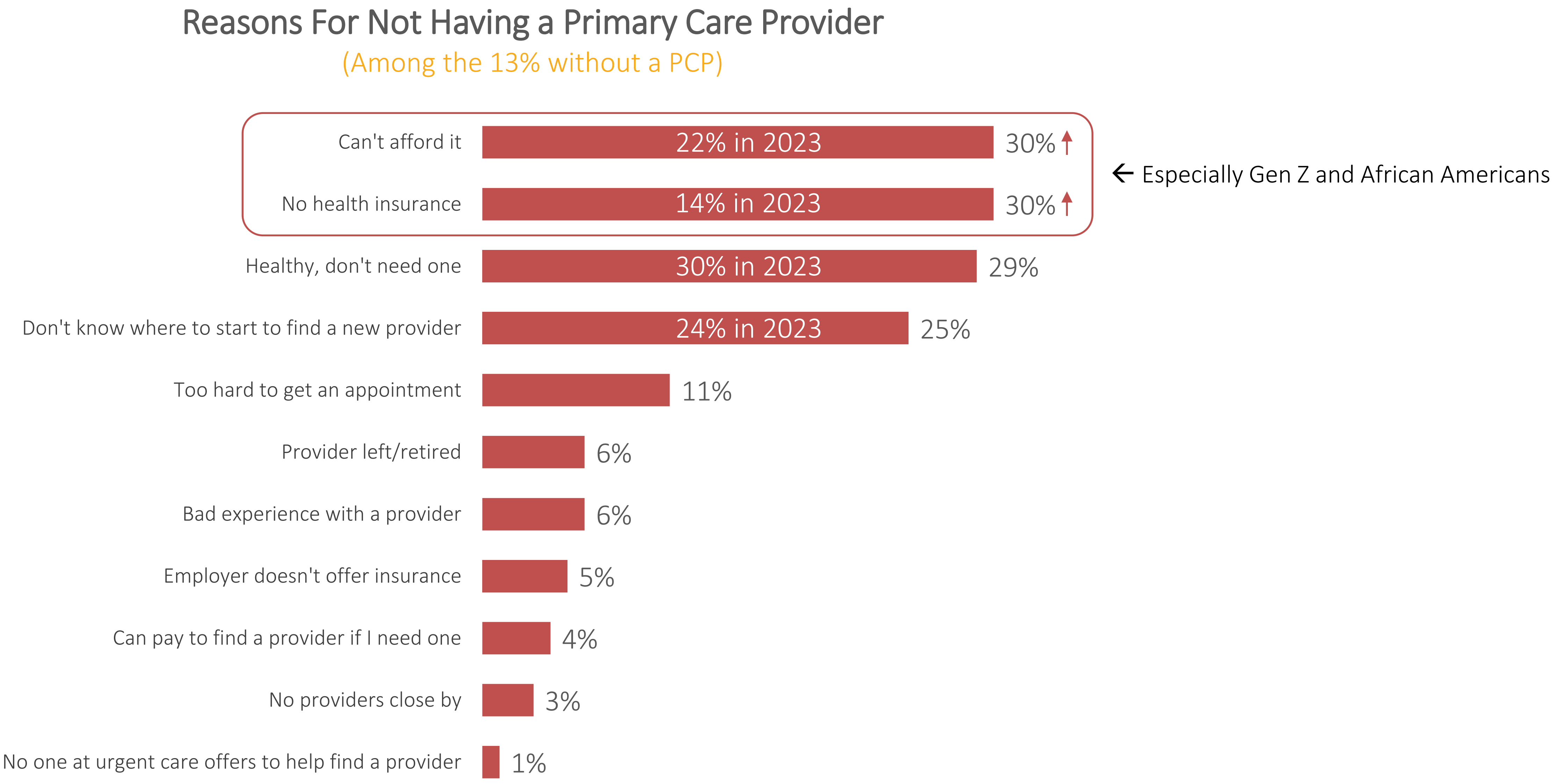
Q7 Is your primary care provider affiliated with/primarily admit patients to your preferred health system? (n=887)
Q8 Would you have picked this primary care provider if they were <u>not</u> affiliated with/admit to your preferred health system? (n=630)

A PCP's affiliation with their preferred health system is absolutely critical to more chronically ill patients



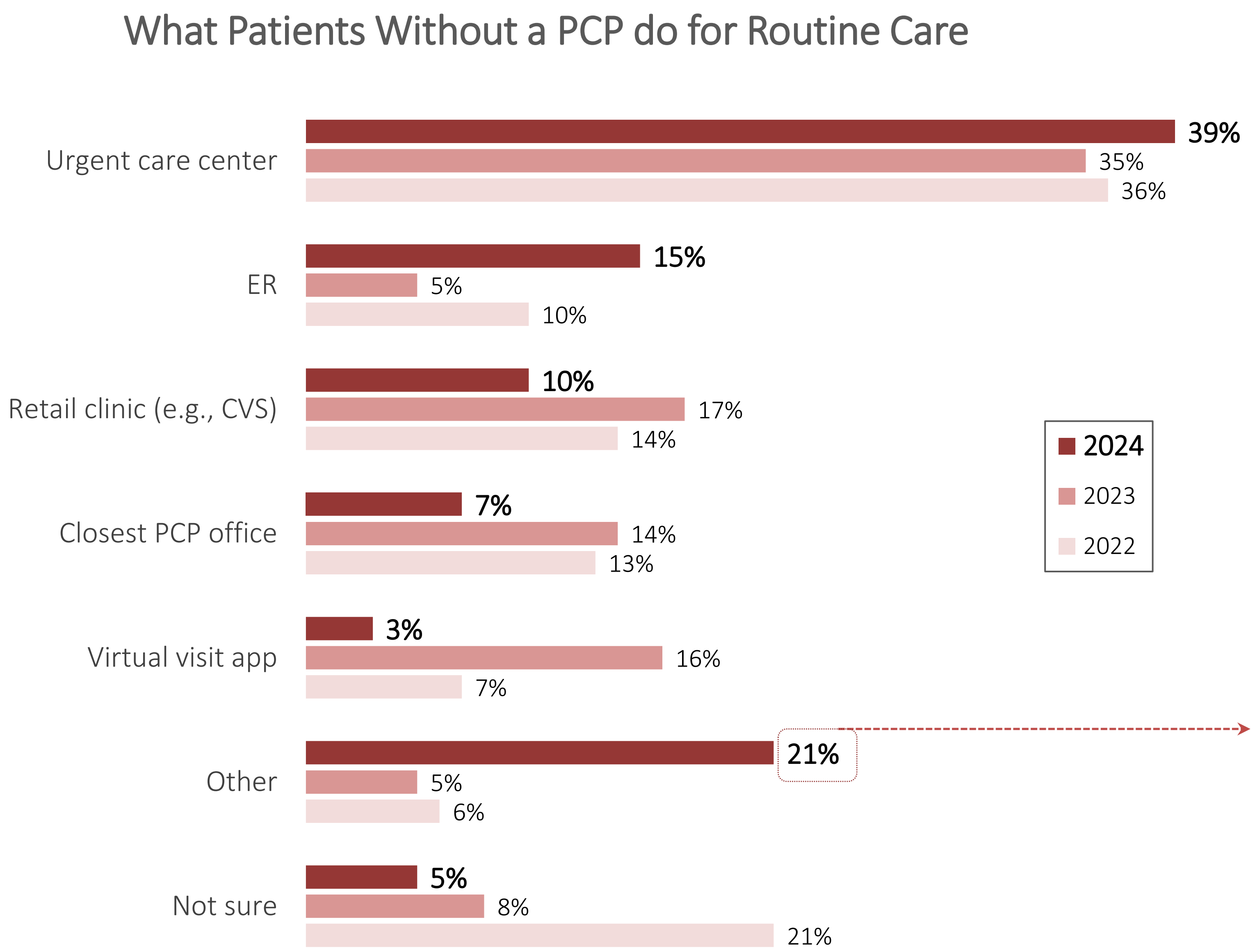
Q9 If your primary care physician retired, moved, or otherwise was no longer able to be your physician, how important would it be to you to stay with a new provider who was affiliated with/admitted to the same health system/hospital? (n=887)

For many, they simply can't afford to have a PCP; mostly likely because they do not have health insurance



Q13 Why do you currently NOT have a primary care provider? Check up to 3 reasons. (n=118)

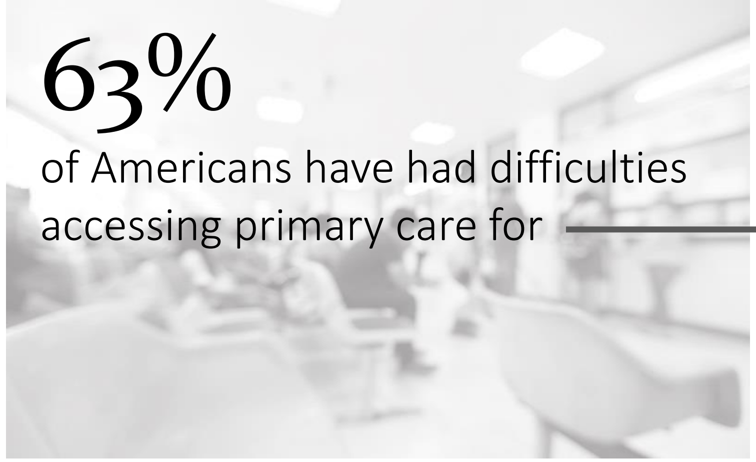
How can we educate patients without a PCP when and when not to go to the ER? They don't have that 'quarterback' for care…



- *Take care of it myself.*
- *Treat myself with over-the-counter medication.*
- *Thug it out.*
- *Self treat.*
- *For anything minor/routine I take care if it myself, even if it takes weeks or months to get better.*
- *Take care of myself and I'm assisted by a neighbor who was a nurse or by my sister.*
- *Take care of it at home.*
- *Self-heal.*

PRIMARY CARE ACCESS

More than six in ten patients have had difficulty accessing primary care and are typically waiting twice as long as they find acceptable



Sick care with PCP	19%
Follow-up doctor's office visit	18%
Annual physical/wellness visit	15%
Urgent care center visit	11%
Screening test	6%
Outpatient testing or imaging	6%
Minor injury	5%
Virtual visit	4%

Our primary challenge → ACCESS!

Actual Visit Wait vs. Expectations

11 days

5 days

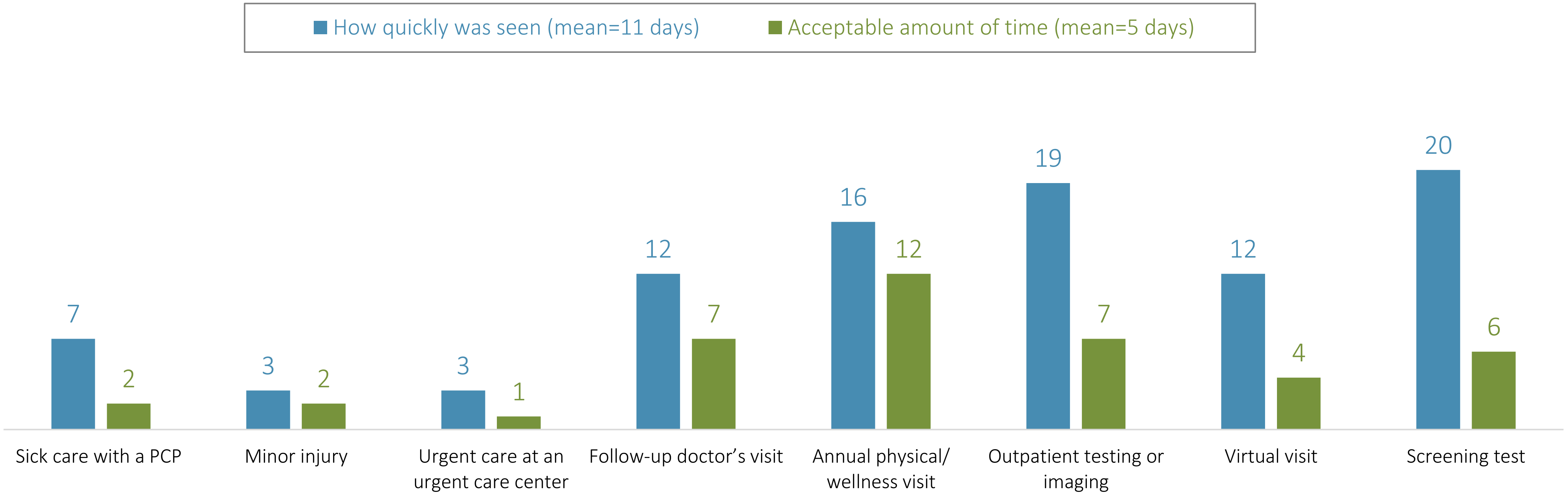
See next chart for wait times by setting

Q15 When it comes to accessing primary care, would you say it is easy to access primary care…? (n=1,005)
Q16 You mentioned that accessing primary care was not easy EVERY TIME you needed it. What type of appointment did you have problems with most recently? (n=621)
Q17 How quickly were you able to be seen for this appointment for {RESTORE Q16 RESPONSE}? (n=546)
Q18 What would an acceptable time have been to be seen for this appointment for {RESTORE Q16 RESPONSE}? (n=546)

What's more, regardless of the primary care 'setting,' patients are waiting longer than is acceptable

Timeliness of Appointments (past year):

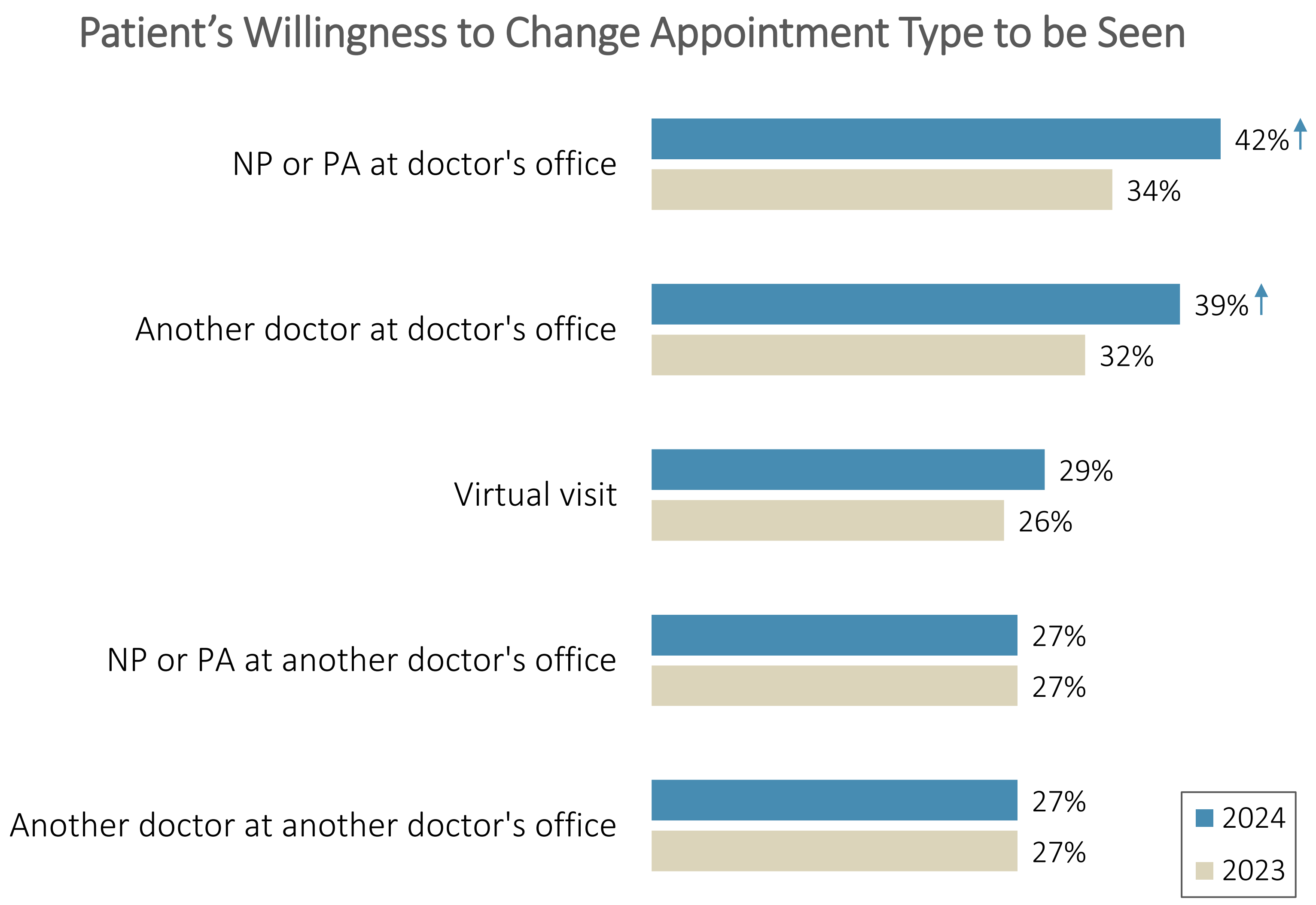
Number of Days to Be Seen vs. Expectations



	Sick care with a PCP	Minor injury	Urgent care at an urgent care center	Follow-up doctor's visit	Annual physical/ wellness visit	Outpatient testing or imaging	Virtual visit	Screening test
Actual Minus Expectations	+5	+1	+2	+5	+4	+12	+8	+14
2023 =	+2	+2	=	+3	+12	+9	+1	+9

Q17 How quickly were you able to be seen for this appointment for {RESTORE Q16 RESPONSE}? (n=546)
Q18 What would an acceptable time have been to be seen for this appointment for {RESTORE Q16 RESPONSE}? (n=546)

Consumers are increasingly open to alternative solutions; we can no longer say ‘sorry, Dr. Smith is not available’ and leave it at that



Q19 Now, suppose you were trying to schedule a doctor’s office visit for sick care and the doctor could not see you for at least a week or longer. If the office offered that you could be seen that same day, would you change to any of the following…? (n=1,005)

Patients across the country have experienced a wide variety of issues across their care journeys

1) Scheduling issues are the new poster child for health care hassles
2) Post-Covid, consumers want health care to partner with them in their health and well-being, so we need to up our game in providing that type of information and services

Have you experienced any issues with the following healthcare experiences recently?	Total US	Major impact on overall experience	Segments more likely experiencing issues with this experience
Scheduling an appointment with your provider	17%	36%	Millennials, Hispanics
Finding good information about health, healthcare, or wellness topics	12%	33%	Gen Z, Acute condition
Getting follow-up care after a visit or procedure	11%	35%	Acute condition
Getting accurate upfront pricing about a procedure, test, visit, etc.	10%	47%	Gen Z and Millennials, Healthy
Using an online patient portal (electronic medical record)	10%	23%	Gen Z and Millennials, have a PCP
Using a healthcare website or app	9%	27%	Gen Z, Millennials, Silent
Getting calls/emails from your provider's office	8%	37%	Gen Z, Acute condition
Receiving care at a hospital or clinic	8%	50%	Gen Z, Acute condition
Having a tele-health or virtual visit	7%	34%	Men, Gen Z, African Americans
Getting in to have a procedure at the hospital	6%	39%	Gen Z, Acute condition
Trying to pay a bill online	5%	35%	Gen Z and Millennials, African Americans
None of the above	56%	--	Younger adults, Healthy or Chronic

Q20 Have you experienced any issues with the following recently? (n=1,005)
Q21 How much of an impact did that issue have on your overall healthcare experience? (n=46 - 154)

THE DIGITAL HEALTH CARE HIGHWAY

The digital health care highway is getting busy, especially with Gen Z and Millennials → are we ready to meet them on their digital journey?

> *"Brands must invest in people before people invest in brands."*
> -- Rob Klein

Experiences with Digital Healthcare

Sought out information about a medical condition — 53%

Compared what different **providers** offer before choosing where to go — 30%

Looked for and **chose a new physician** — 29%

Scheduled a health care visit, test, procedure, etc.	58%
Had a **virtual or telehealth** visit with a provider	43%
Contacted your provider with a question or issue	51%

(Re)filled a **prescription**

Paid a medical bill

Share condition-related data with your provider using a smart watch or other wearable device

Manage your overall health using a digital tool that interacts with your provider

Q22 Which of the following healthcare experiences, if any, have you experienced digitally? (n=1,005)

Look who is already on the digital health care highway…

Stop on the digital highway	Target Audience
Sought out information about a medical condition	Hispanics, Chronic condition
Compared what different providers offer before choosing where to go	Gen Z, Hispanics, Acute situation, Parents
Looked for and chose a new physician	Gen Z, Asian Americans, Parents
Scheduled a health care visit, test, procedure, etc.	Gen Z, Higher income
Had a virtual or telehealth visit with a provider	Millennials and Gen X, Hispanics, Have a PCP, Acute and/or Chronic condition
Contacted your provider with a question or issue	Women, Hispanics, Have a PCP, Chronic condition
(Re)filled a prescription	Women, not Gen Z, Have a PCP
Paid a medical bill	Healthy, Higher income
Share condition-related data with your provider using a smart watch or other wearable device	Men, Gen Z, Hispanics, Lower income
Manage your overall health using a digital tool that interacts with your provider	Gen Z, Hispanics, Have a PCP

Q22 Which of the following healthcare experiences, if any, have you experienced digitally? (n=1,005)

HOSPITAL REVIEWS & RATINGS

Patient satisfaction is no longer just a retention strategy… patients review you online and others listen, and that can drive net-new business or limit it (i.e., a customer acquisition strategy)

Especially among Women, Millennials and Gen X, and Parents

Most Useful Source for Information on Hospitals before Choosing One

Online patient review sites: 43% (39% 2023)

Quality ranking organizations: 25% (25% 2023)

Neither: 17% (25% 2023)

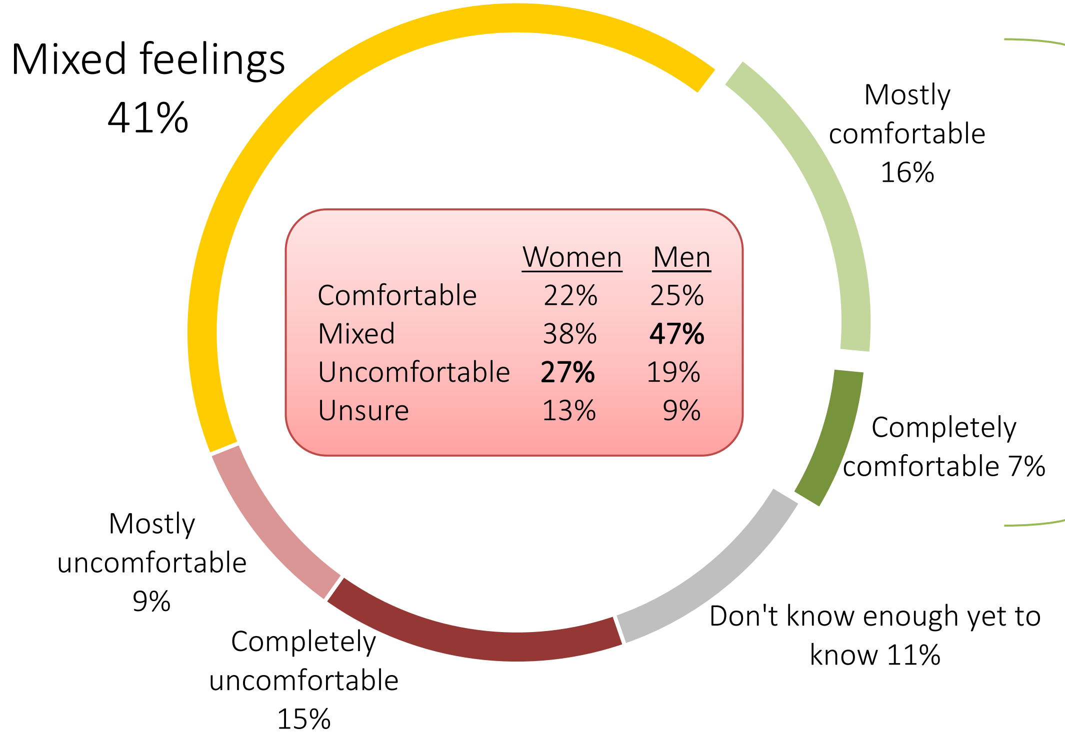
Not sure: 14% (11% 2023)

Q23 Now, if you were looking online for information to compare different hospitals before you decided on which hospital to choose which of the following sources of information, if either, would you more likely find useful in your decision-making? (n=1,005)

COMFORT LEVEL WITH AI

Most Americans, especially women, are skeptical about the use of AI in health care, and this skepticism only increases with age

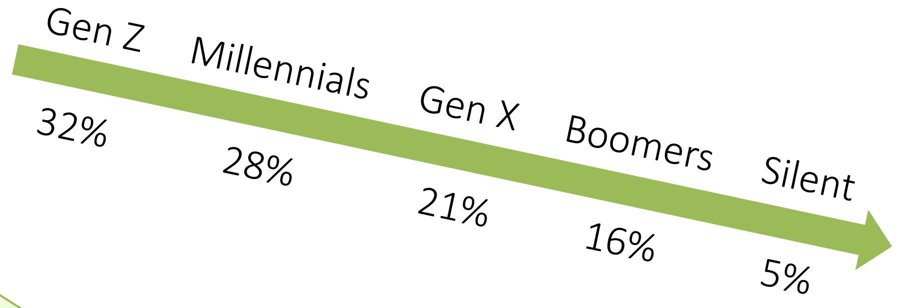
Comfort Level with AI in Health Care



	Women	Men
Comfortable	22%	25%
Mixed	38%	**47%**
Uncomfortable	**27%**	19%
Unsure	13%	9%

23%

Comfort Level with AI in Health Care Declines with Age



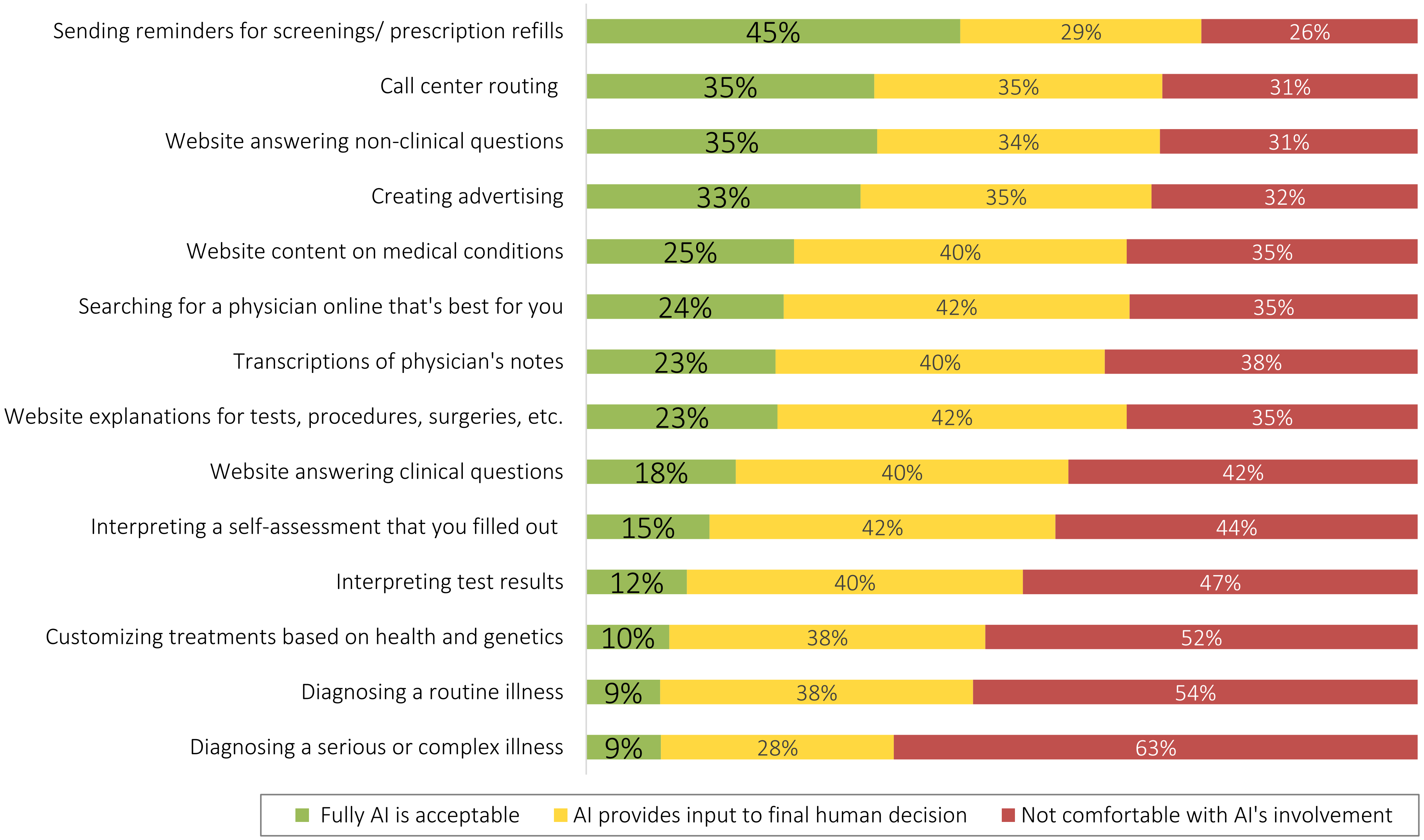
Hispanics: 35%↑
African Americans: 25%
Caucasians: 22%
Asian Americans: 21%

^AI stands for Artificial Intelligence. Artificial intelligence is the simulation of human intelligence processes by machines, especially computer systems. Specific applications of AI include expert systems, natural language processing, speech recognition and machine vision. Artificial intelligence in healthcare refers to the use of advanced computer systems intended to analyze health data, improve patient care through personalized treatment plans, and enhance diagnostic accuracy, streamlining healthcare processes for better outcomes.

Q24 Overall, how comfortable are you with the use of AI in health care? (n=1,005)
^ = description of AI provided

Men and younger adults are much more comfortable with AI across various health care uses; convincing women who are the majority health care decision-maker for the household across the country on the merits of AI will take more effort

Comfort with AI in Various Health Care Interactions



'Fully AI' significantly higher for…

← Asian Americans

← Millennials and higher income

← Men, Millennials, and Asian Americans

← Millennials and Asian Americans

← Millennials

← Millennials

← Men and Gen Z

← Men and Asian Americans

← Men and Gen Z

← Men and Gen Z

← Men and Gen Z

← Men and Gen Z

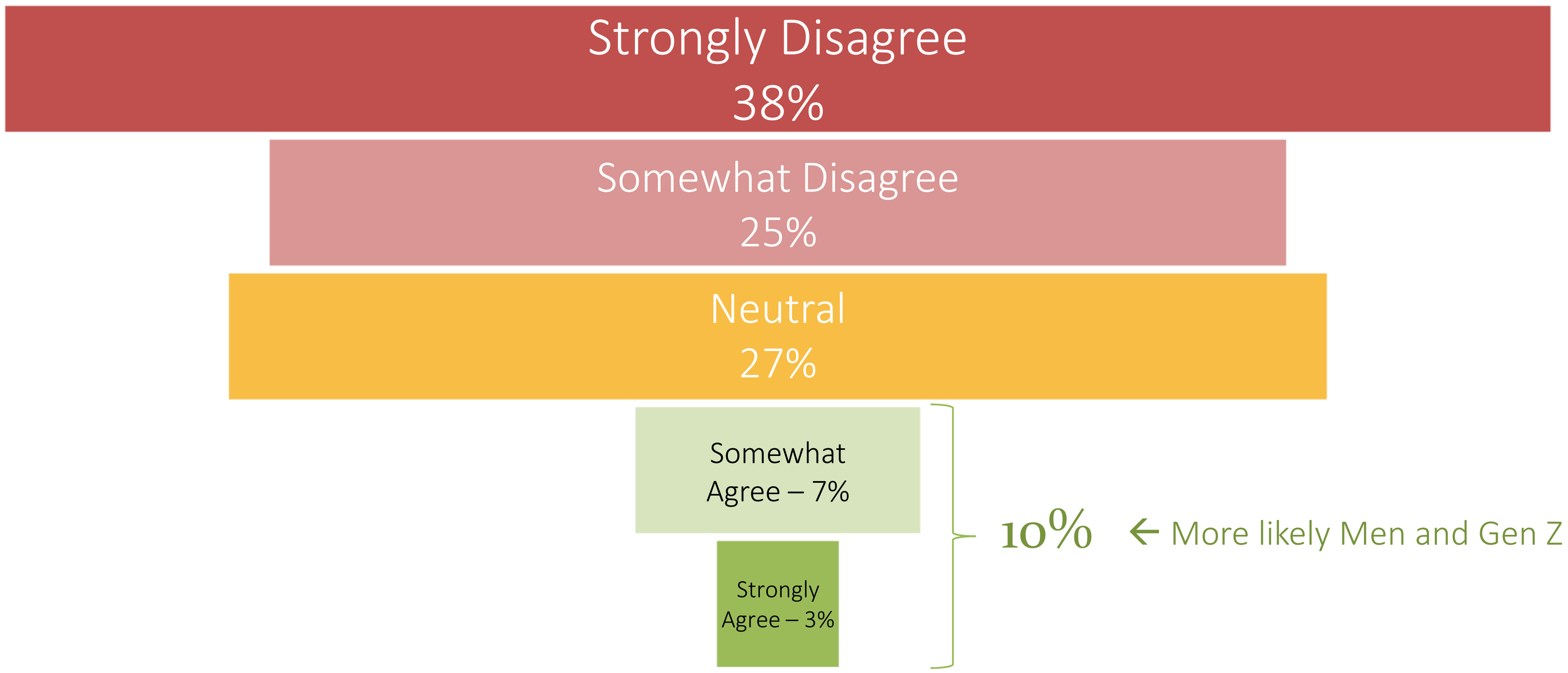
← Men and Gen Z

← Men and Gen Z

Q25 What level of comfort do you have with AI's involvement in each of these health care interactions? (n=1,005)

Most Americans do not agree that AI is more accurate than a 'human' doctor in diagnosing disease

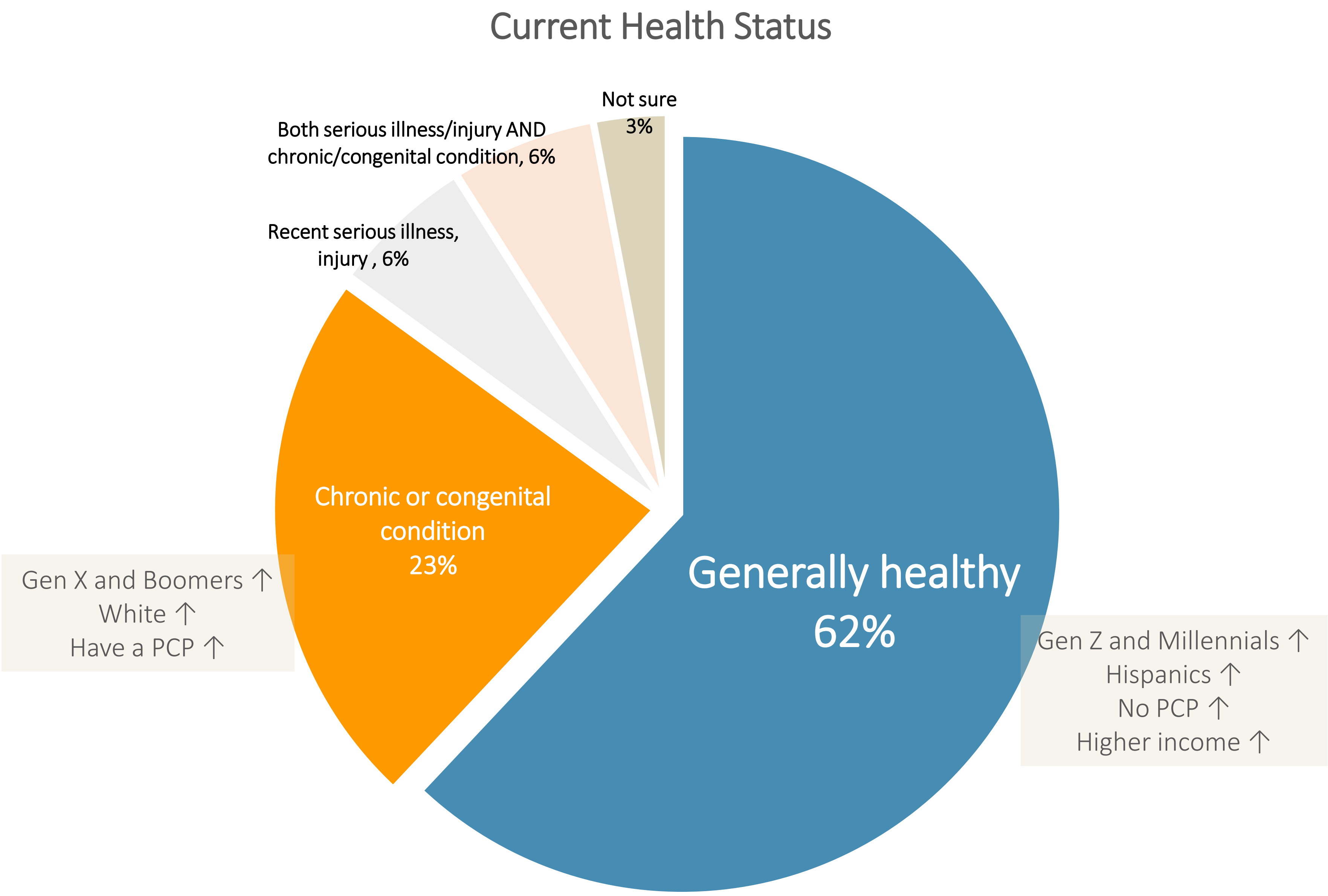
"AI is more accurate in diagnosing a disease than a doctor."



Q26 Assume that the AI program and the physician are both provided with the same information and test results about the patient's symptoms. How much do you agree or disagree with the following statement? (n=1005)

HEALTH STATUS AND HEALTHY BEHAVIORS

A majority of adults across the country are generally healthy, but three in ten are managing a chronic condition.



Q32 Which of the following statements best describes your current health status? (n=1,005)

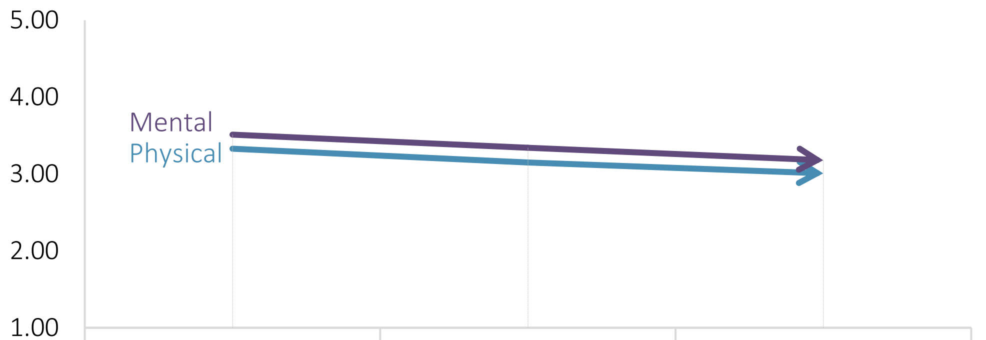
American's self-reported physical and mental health levels are trending down

Average Rating:
Physical Health = 3.01
Mental Health = 3.18

	Poor (1)	Fair (2)	Good (3)	Very Good (4)	Excellent (5)
Physical Health	6%	24%	41%	22%	7%
Mental Health	10%	19%	30%	25%	16%

Women and Millennials report lower levels of mental health.

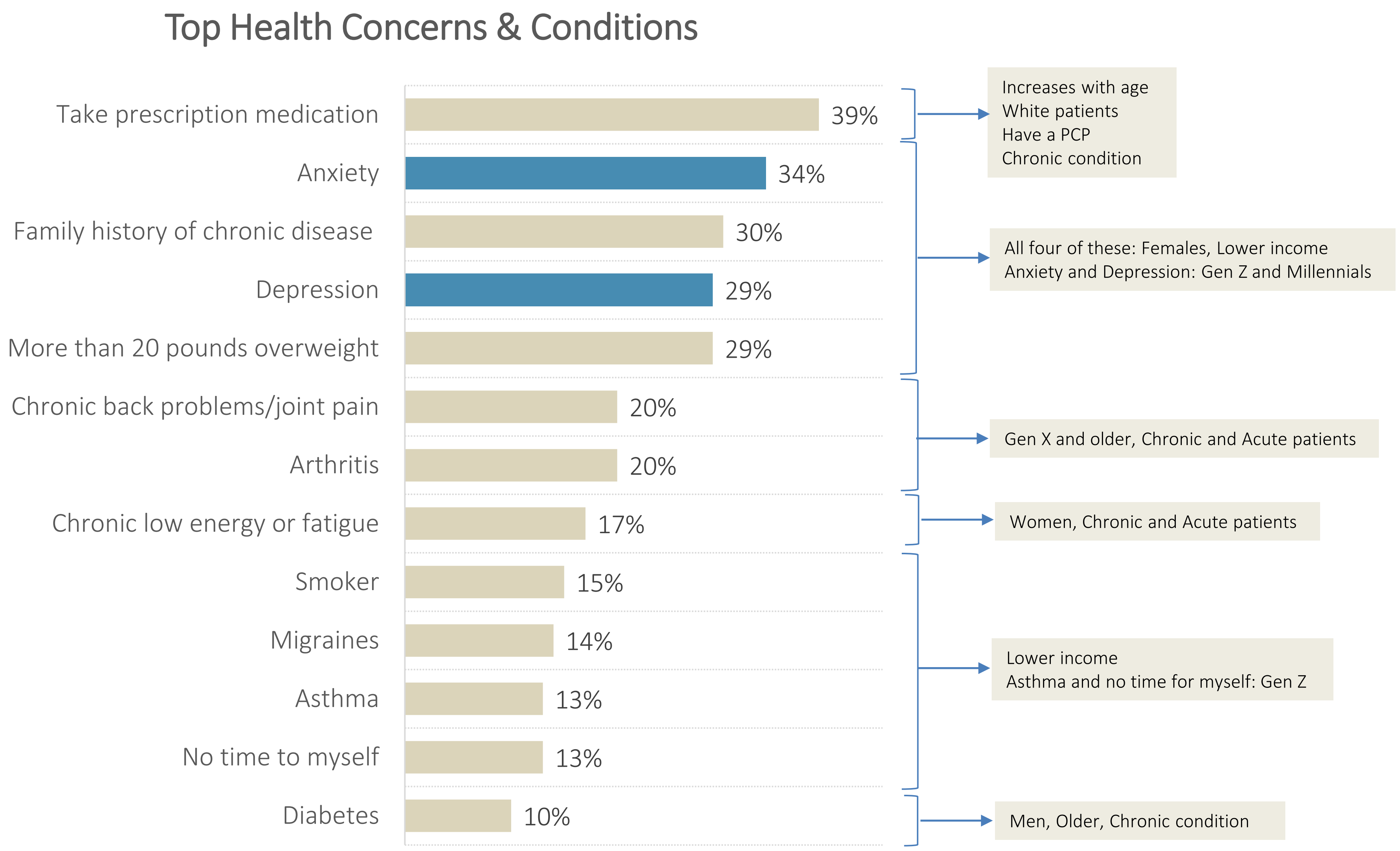
3-year trend:



	2022	2023	2024
Physical health	3.33	3.15	3.01
Mental Health	3.51	3.34	3.18

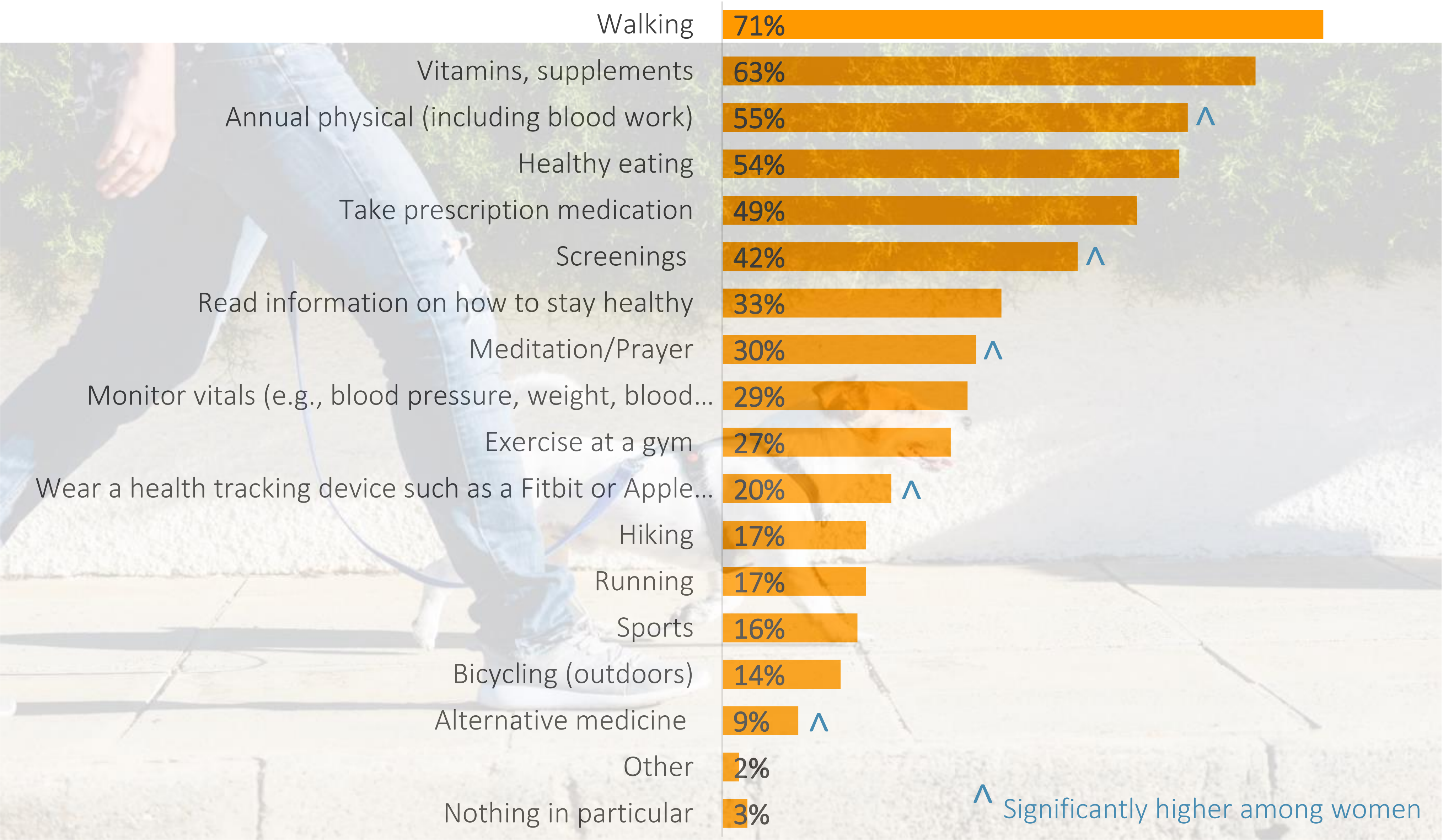
Q28 In general, would you say your overall __________(physical/ mental) health is...? (n=1,005)

We are facing a growing mental health crisis in this country, and you are on the front line (or should be)



Q33 Do you have any of the following health conditions or concerns? (n=1,005)
Concerns and conditions at 10%+ shown.

Americans report staying healthy by… how can your brand become ‘relevant’ on this journey?



Now is the time to dust off your population health playbook and become a 'real partner' in people's health and well-being

Agreement with Various Statements about Health

About 2/3 or more agree	I want a health system that helps me take better care of myself	78%
	My doctor and hospital are partners in my health and well-being	69%
	Urgent care centers are only for when my primary care provider can't see me in a timely manner	60%
About 1/2 agree	I try to keep my body in top physical shape	53%
	If I am in average health, I am satisfied	50%
	If I were looking for a new physician on a website, I would be more likely to choose one who showed me their personality	47%
	Accessing and using healthcare is getting harder and harder	45%
About 1/3 or less agree	Healthcare providers are there to fix you when you are sick or injured and that's it	37%
	My culture and background shape how I make healthcare decisions	31%
	I never seem to have enough time to take care of my own health	31%
	I have suffered financial hardship from large medical bills in the past several years	28%
	Lack of equity or inclusion in healthcare has negatively impacted my ability to get the best care	22%

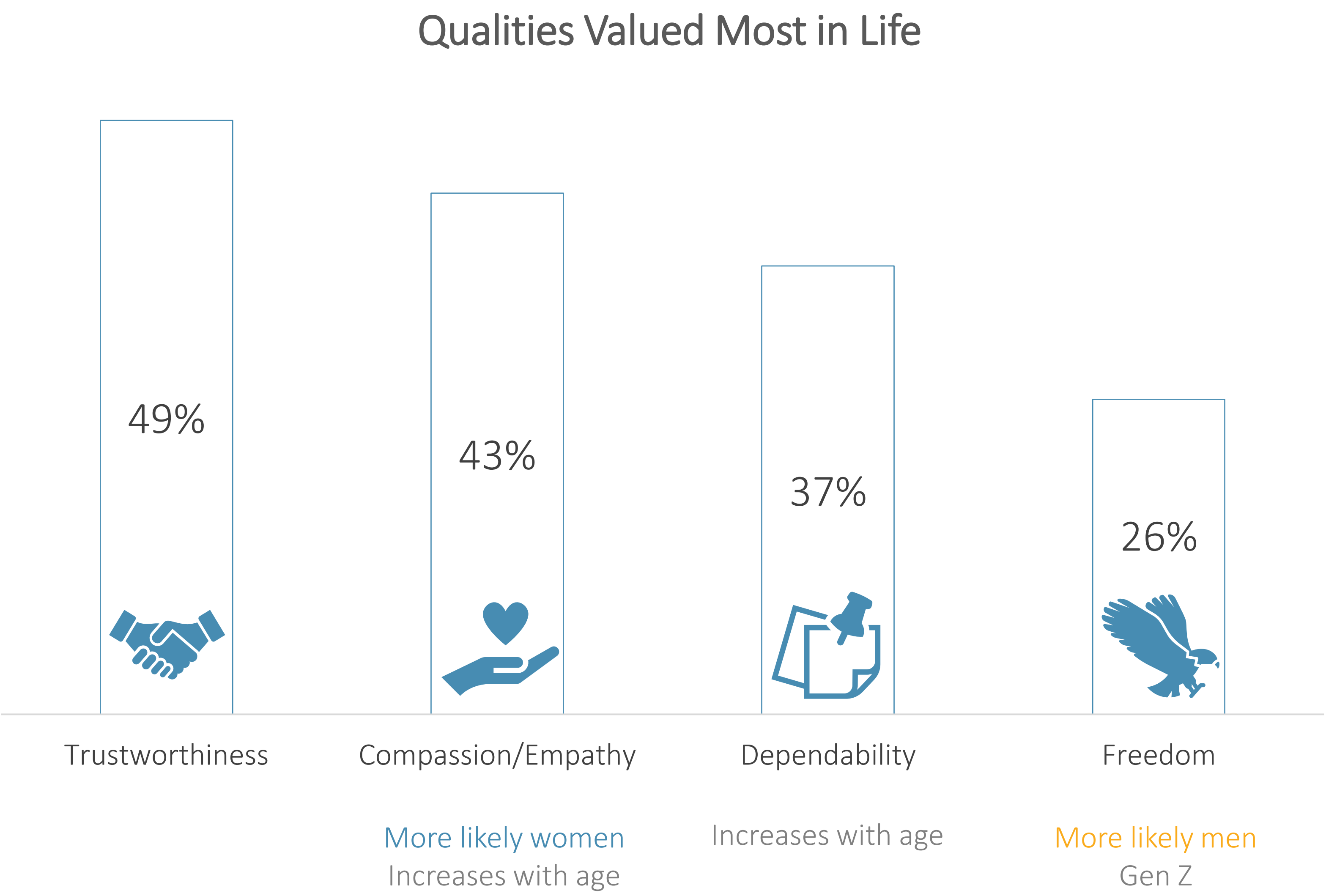
Q27 Each of us deals with health situations in different ways. The following statements cover a wide range of health attitudes. Please tell us how much you agree or disagree with the following statements.
% Agree + Strongly Agree shown. (n=1,005)

Family is a priority across all demographics; health and wellness as a priority increases with age

Life Priorities	
Rank 1st 2nd or 3rd	Key Segments
93% Family	Children at home, Higher income
78% Health and wellness	Increases with age, Higher income
52% Friends	Higher income, Chronic condition
36% Religion	South, African Americans
28% Work	Males, Gen Z to Gen X, Hispanics, Lower income
13% Social activities	Gen Z, Lower income

Q30 How would you rank the following priorities in your life? Please rank each of the following priorities from most (1) to least important (6). (n=1,005)

Qualities Americans value most start with trustworthiness and, as you will see later in this presentation, trust in health care providers remains low



- **The next tier of valued qualities includes:**
  - Growing and changing 24%
  - Always striving to be the best I can be 23%
  - Being proactive about my health 22%
  - Being health conscious 20%
  - Authenticity 20%

Q29 Which of these words or phrases, if any, would you use to describe the qualities you value most in life? Please check up to 4 words or phrases that best describe what qualities you value most. (n=1,005)

Americans have many things they 'dread' about health care…

Going to the doctor because most of them don't actually listen at all.

Everything. It's all nerve wracking. Developing a relationship with the doctor and all of it.

Annual physicals which include blood work. I especially hate colonoscopies and similar other kinds of tests.

Being touched, then ignored, and the cost.

Doctors aren't listening and just rush me along like I'm a number they're trying to get through.

Going to any type of doctor. I don't trust them, nor what they tell me.

I dread waiting. No matter when you arrive there is a wait. I also dread talking to the doctor to have them truly hear what I am saying.

The cost! Every year the cost of my healthcare goes up. They take more and more out of my paycheck and it's frustrating.

Filing a claim to get my money back. It's always a nightmare to fight these people.

Getting healthcare appointments in a timely manner that fit my schedule and are on my terms.

All the hoops one needs to jump through to have a visit or a procedure covered by insurance.

OEQC Please think about your overall health care needs. What are some of the things that you **absolutely dread** when it comes to your health care? [Select Verbatims shown]

PRICE SHOPPING AND BILLING → THE 'TROUBLE BOOKEND CHILDREN'

One in ten Americans are pricing shopping and choosing the least expensive option

21% Price Shopped

24% in 2023
20% in 2022

More likely to price shop:
- Gen Z: 43%
- Hispanics: 29%
- Acute condition: 30%
- Lower income: 24%

Called: 56%
54% in 2023
54% in 2022

Went online: 24%
26% in 2023
27% in 2022

Stopped in personally: 10%
10% in 2023
7% in 2022

Emailed: 5%
9% in 2023
11% in 2022

46% Chose Least Expensive Option

56% in 2023
53% in 2022

More likely to choose least expensive option:
- Gen Z: 51%
- Millennials: 54%
- African Americans: 59%
- Lower income: 55%

% who Price Shopped by Service:

Dental services	20%
Lab services	16%
Screening or test	13%
Urgent care visit	9%
Doctor’s visit	8%
Outpatient surgery	5%
GI procedure	5%
PT/Occ health	3%
Ortho procedure	3%
Maternity	3%
Inpatient surgery	3%
LASIK eye surgery	2%
Cosmetic surgery	1%
Weight reduction surgery	1%
Cardiac procedure	1%

Q34 Next, within the past year, did you or did a member of your immediate household contact any healthcare organizations, hospitals, or physician offices to ask about the price for a specific visit, test, treatment, or surgery? (n=1005)
Q35 How did you check on pricing the most recent time? (n=186)
Q36 What type of health service did you ask about pricing for the most recent time? (n=186)
Q37 Did you end up choosing the least expensive provider the most recent time? (n=186)

While paying a health care bill online declines with age, satisfaction with online bill paying increases with age

Preferred Method to Pay a Health Care Bill

67%
Online

12%
Mail it in

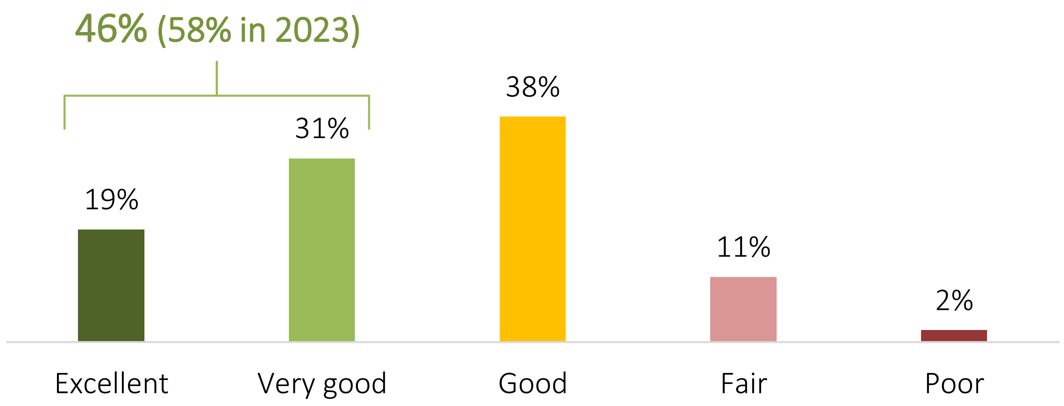
10%
Phone

4%
Other way

62%
have paid a health care bill online via a provider website

52% in 2023
41% in 2022

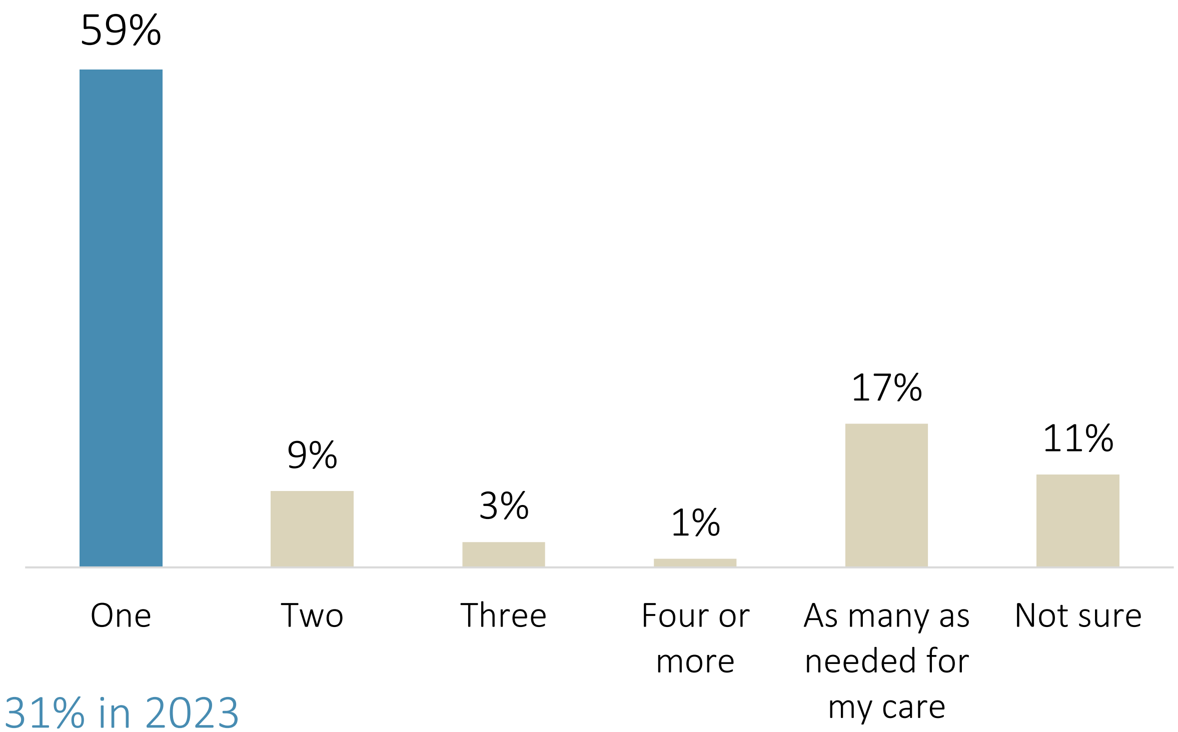
Satisfaction with Online Bill Paying via Provider Site



Q38 Do you prefer to pay medical bills…? (n=1,005)
Q39 Do you ever pay your healthcare bills online through your provider’s website? (n=1,005)
Q40 How would you rate your online healthcare bill paying experiences overall? (n=586)

Patients are increasing growing tired of all the billing hassles health care throws their way

Acceptable Number of Bills to Receive



31% in 2023

79%

say **ONE MONTH** is the longest it should take for you to send a bill

76% in 2023

Q41 Regardless of how many bills you actually have received for a particular experience, how many different bills for the same healthcare experience would you prefer to get? (n=1,005)

Q42 And what is the maximum acceptable amount of time after your healthcare experience to wait for a bill (assuming you had a balance due)? (n=1,005)

COVID-BRAIN

COVID-brain is not subsiding, especially among women, Gen Z, and those with a chronic and/or acute condition

Memory

I am having **trouble** remembering simple things

30%

25% 2023
27% 2022

Patience

I find myself **losing** my patience easier than before

37%

30% 2023
33% 2022

Attention Span

I find it **harder** to concentrate and pay attention to things

32%

29% 2023
29% 2022

Brand Linkage

Even if I remember an advertisement, I find it **harder** to remember who the company was

31%

33% 2023
34% 2022

Q43 For the next question, please agree or disagree with each statement as it applies to how you feel now. (n=1005)
% Agree/Strongly Agree scores shown.

Messaging must be…

1. Simple
2. Engaging
3. Repetitive

Brand must be the star

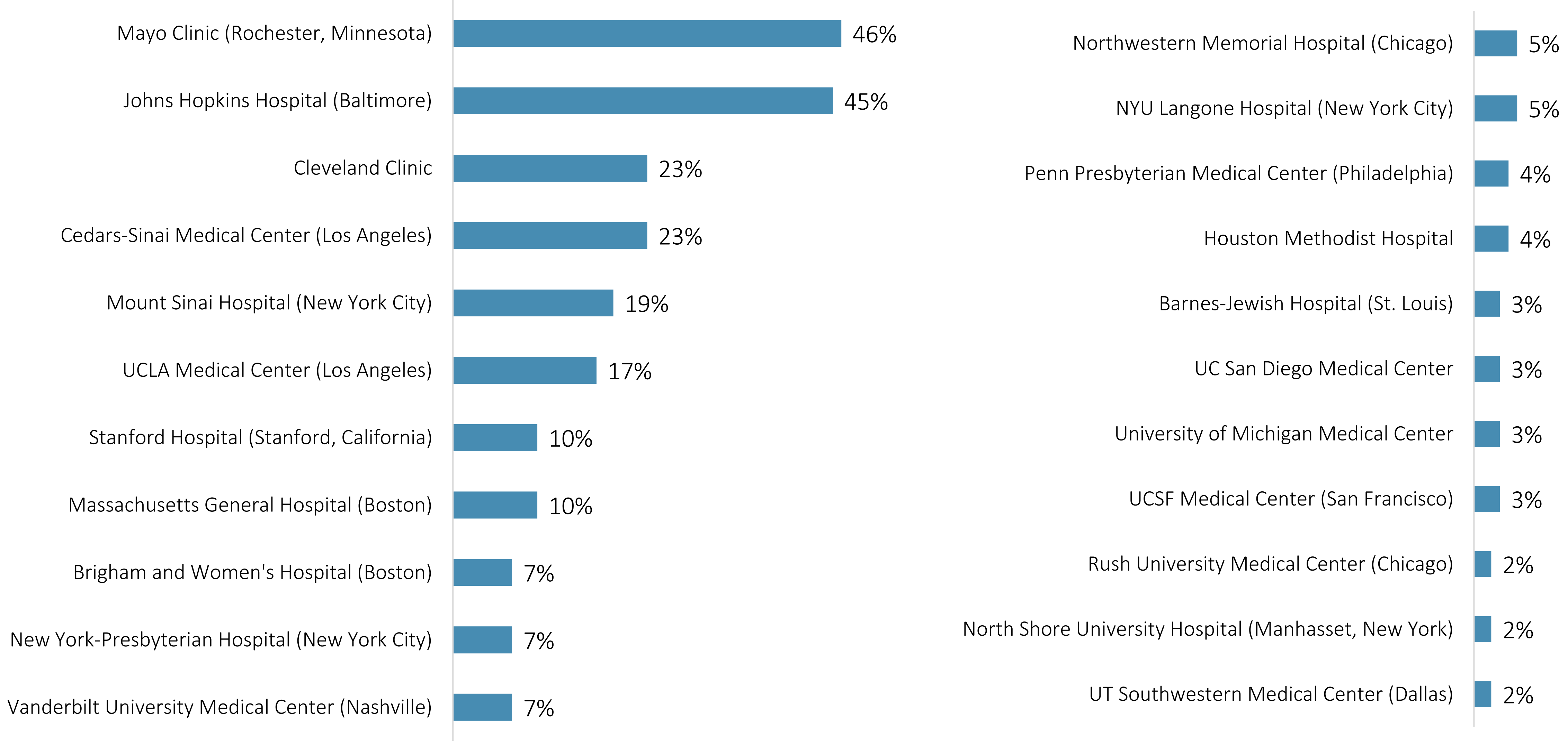
As proven with…

NATIONAL HOSPITAL BRANDS

Based on US News & World Report's 2023-2024 Honor Roll, two hospitals stick out for a national reputation in clinical excellence → not surprisingly, geography plays a major roll except for Johns Hopkins which has the most consistent image across the country

Nationally Recognized for Clinical Excellence

From the US News & World Report's 2023-2024 Honor Roll



28%
do not know enough to pick any hospital

Q44 Which of the following hospitals, if any, has a national reputation for clinical excellence in your mind? Please select up to 5 hospitals from the alphabetized list that you feel have the strongest national reputation for their clinical excellence. (n=1,005)

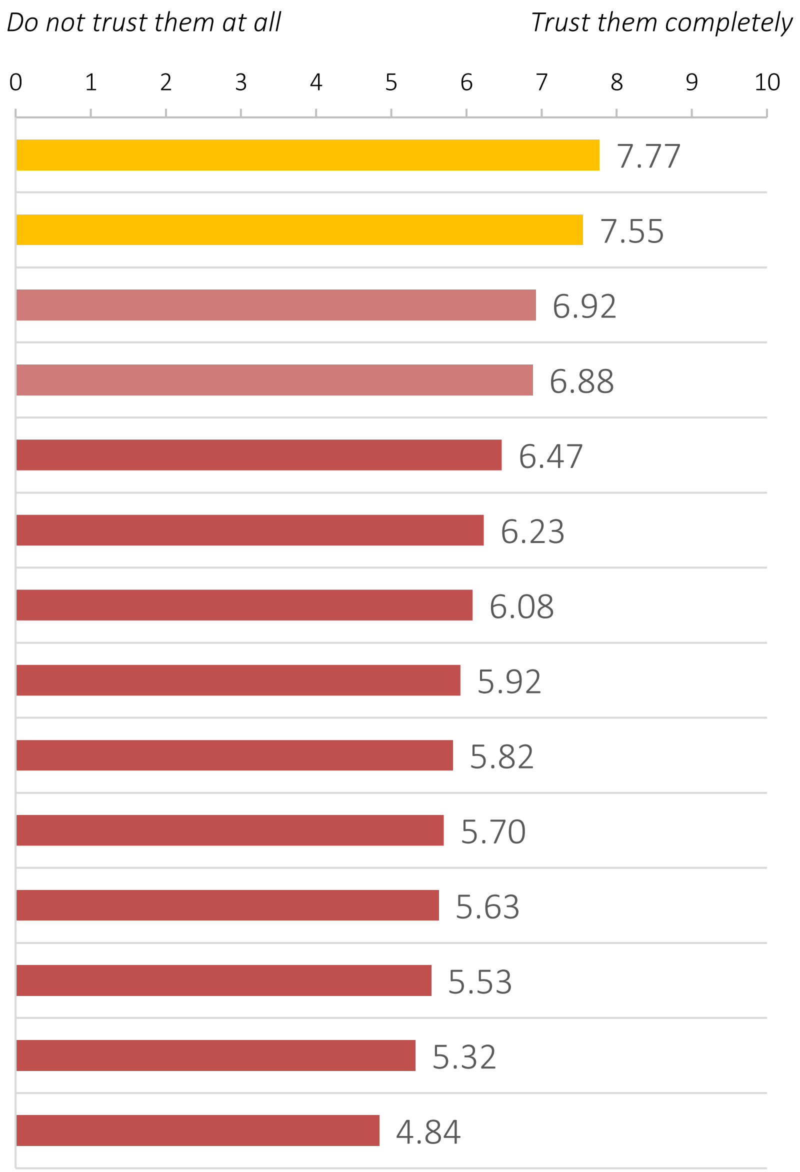
TRUSTWORTHINESS OF HEALTH CARE PROVIDERS

Trust is not improving for many healthcare-related organizations, especially the disruptors and for-profits; recall that trustworthiness is the quality Americans value most

Average Trust Rating

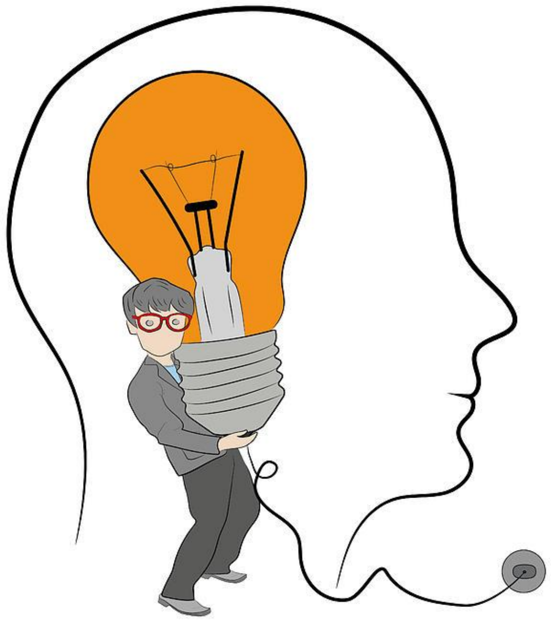
6.19

6.38 in 2023
6.45 in 2022



	2022	2023	2024
Children's Hospitals	7.44	7.47	7.77
Physicians	7.34	7.39	7.55
University Hospitals (Teaching/ Academic)	6.92	6.89	6.92
Non-profit hospitals	6.84	6.81	6.88
CVS	6.68	6.54	6.47
WebMD	6.38	6.44	6.23
Google	6.24	6.28	6.08
US News & World Report Hospital Rankings	6.00	5.93	5.92
Amazon	6.37	6.22	5.82
For-profit hospitals	6.20	5.87	5.70
Walmart	5.89	5.97	5.63
Health insurance companies	6.16	5.98	5.53
Apple	5.96	5.96	5.32
Pharmaceutical companies	5.78	5.60	4.84

Q45 Next is a list of people or organizations that are involved in healthcare in different ways. Please tell us how much you trust each using a scale of 0 to 10 where 0 means you 'do not trust them at all' and 10 means you 'trust them completely'. (n=1,005)



SOME POINTS TO PONDER

Key take-aways

- **COVID-brain** is not subsiding, especially among women, Gen Z, and those with a chronic and/or acute condition. Your messaging must adapt to this new way of thinking → make it simple, engaging, repetitive, and the brand is the star.

- This research along with world-wide advertising research confirms that **TV** remains the most effective brand building medium. However, Gen Z are most likely to find all types of health care advertising overdone. What does 'meaningfully differentiating' advertising look like to Gen Z?

- Most people **choose to have a PCP** because that want that single point of contact who knows them and their health needs. The PCP remains the quarterback of care and is at the top of the sales funnel. A weak PCP network will limit growth potential and leads too many patients to the ER for primary care.

- **Gen Z** continue to be least likely to have a PCP. While we tend to think it is because they feel invincible at that young age, it actually has more to do with lack of insurance and affordability. How can you connect them with primary care in a cost-effective manner? (e.g., CVS, CityMD, etc. are doing it)
  - While we tend to view Gen Z as a 'future' customer, it is important to understand that *"brands must invest in people before people invest in brands."*

- **PCP switching** potential is very high. Barriers to switching are the only thing keeping these patients with their current PCP. When the pain of staying becomes greater than the pain of switching, we will start seeing more attrition. Creating loyalty at the PCP level is key to brand stability and growth.

- **Urgent care** is 'Plan B' when "my doctor fails to see me in a timely manner." Having a strong urgent care strategy (whether in-person or virtually) is key to providing coordinated primary care and keeping people out of the ER. What's more, patients are open to alternative provider types if it means they can get seen in a timely manner. Patients want solutions (or at least options) not excuses. A strong urgent care strategy has three major benefits: 1) it keeps patients out of the ER, 2) it enhances loyalty to the brand as it keeps patients in the brand family, and 3) it makes the PCP look good (offers a solution instead of 'sorry I can't help you').

- The **digital health care highway** is getting busy, especially with Gen Z and Millennials → are we ready to meet them on their digital journey?

Key take-aways

- More than six in ten patients have had **difficulty accessing primary care** and are typically waiting twice as long as they find acceptable. Access is your biggest competitive threat. Patients want solutions not excuses and disruptor brands continue to enter your world. *"Outside disruption happens when an industry gets lazy regarding innovation."*

- **Patient satisfaction** is no longer just a retention strategy. Patients review you online and others listen, and that can drive net-new business or limit it (i.e., a customer acquisition strategy). US News is losing credibility and is not seen as very trustworthy. Focus on optimizing your online reputation over spending money on promoting your US News ranking, especially with Gen Z.

- Americans, especially women and older adults, remain skeptical about **AI in health care**. Educating these two key audiences on the benefits and safety of AI in health care will take effort.

- We are facing a growing **mental health crisis** in this country, especially among women and younger adults, and you are on the front line (or should be).

- Consumers want a partner to help them with their **health and well-being**. Now is the time to dust off your population health playbook and truly engage your communities.

- **Upfront pricing and backend billing** continue to be the 'trouble bookend children.' No matter how much you invest in the patient experience, if you don't fix pricing and billing, you will continue to hurt your brand (i.e., trustworthiness).

For more information or to request a presentation to your staff:

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