Klein & Partners
2024 National Consumer Insights Study (NCIS)

Spring 2024

Background, Methodology, and Demographic Profile

INTRODUCTION

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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.

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.

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Methodology

Online Survey
(device agnostic)

Fielded:
March 5 – 9, 2024

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

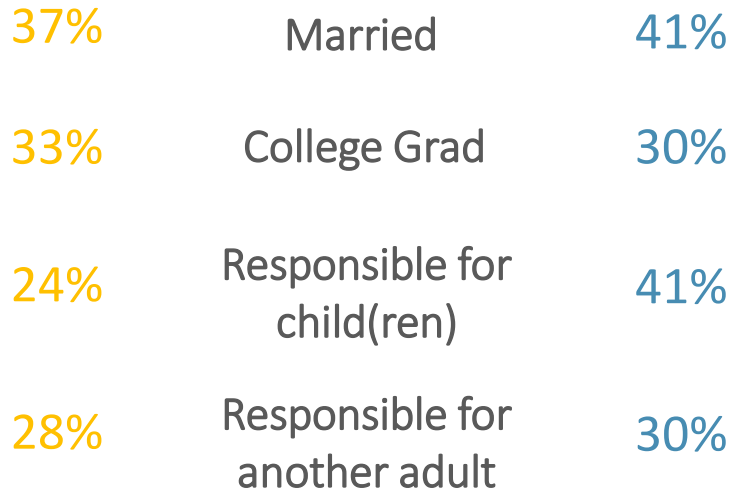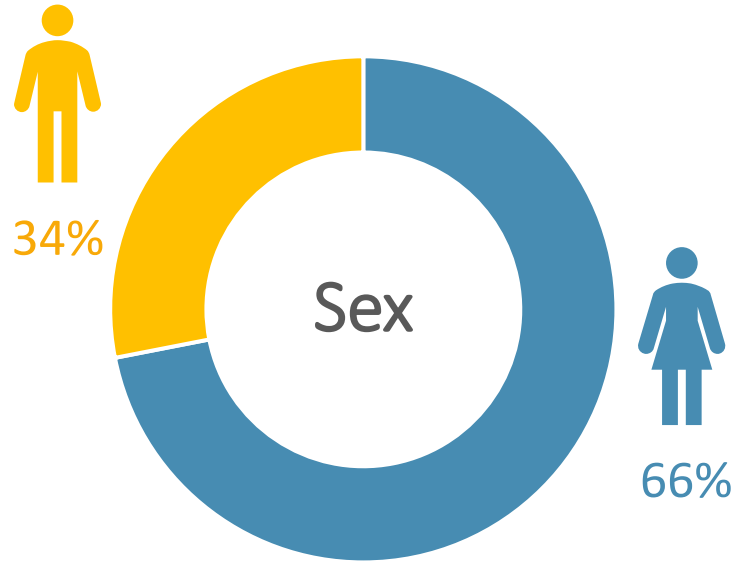National random sample of health care decision-makers.

Note: Arrows (↑↓) and letters (e.g., A, B, C) indicate a statistically significant difference between those two data points.
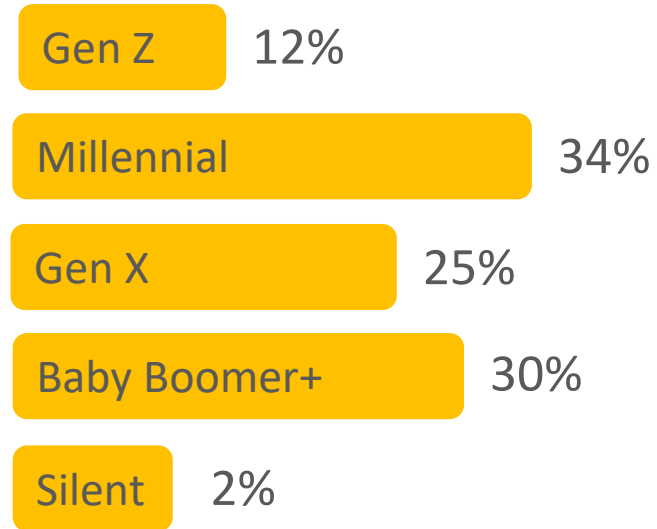
Note: Results presented here represent our sample weighted to reflect Census data. See data tables for all results.

	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

Sex

34% (male)

66% (female)

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%
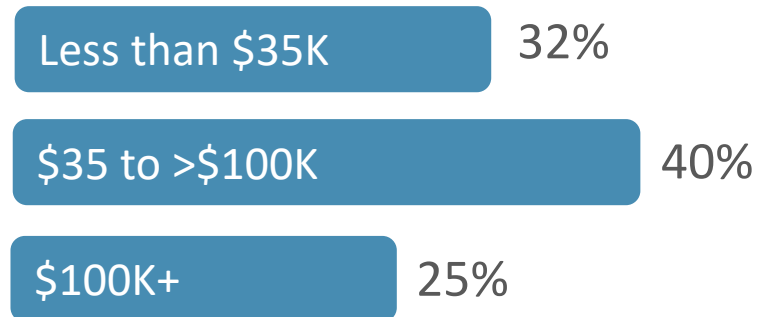
Ethnicity/ Race
(Multi-response)

69% Caucasian

17% Hispanic

16% African American

5% Asian

6% Other

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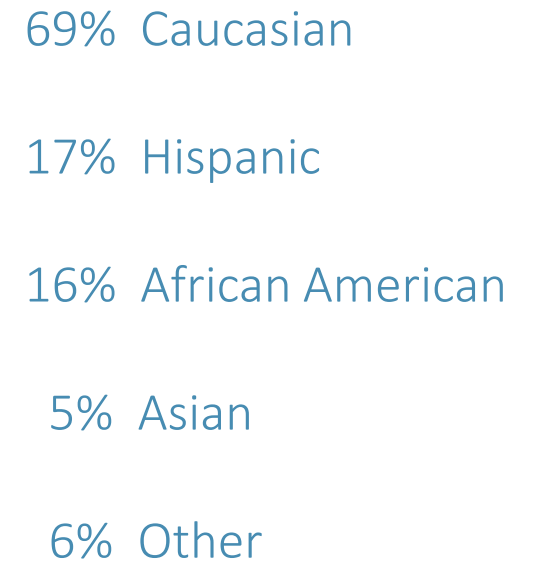
What did we learn?

DETAILED FINDINGS

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COVID-BRAIN

Memory

I am having **trouble** remembering simple things

30%

25% 2023
27% 2022

Attention Span

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

32%

29% 2023
29% 2022

Patience

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

37%

30% 2023
33% 2022

Brand Linkage

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

31%

33% 2023
34% 2022

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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.

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Messaging must be…

1. Simple
2. Engaging
3. Repetitive

Brand must be the star

Your Brand

As proven with…

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ADVERTISING MEDIUM REACTIONS

Healthcare Advertising Media That Is…

Media	Most Memorable	Most Overdone
TV	57%	31%
Online	32%	19%
Social media	32%	25%
Direct mail piece	24%	12%
Radio station	13%	10%
Billboard	10%	11%
Streaming audio/music service	9%	13%
Magazine	9%	8%
Newspaper	7%	7%
Newsletter	6%	5%
At the airport	1%	4%
Other place	3%	2%
None	14%	36%
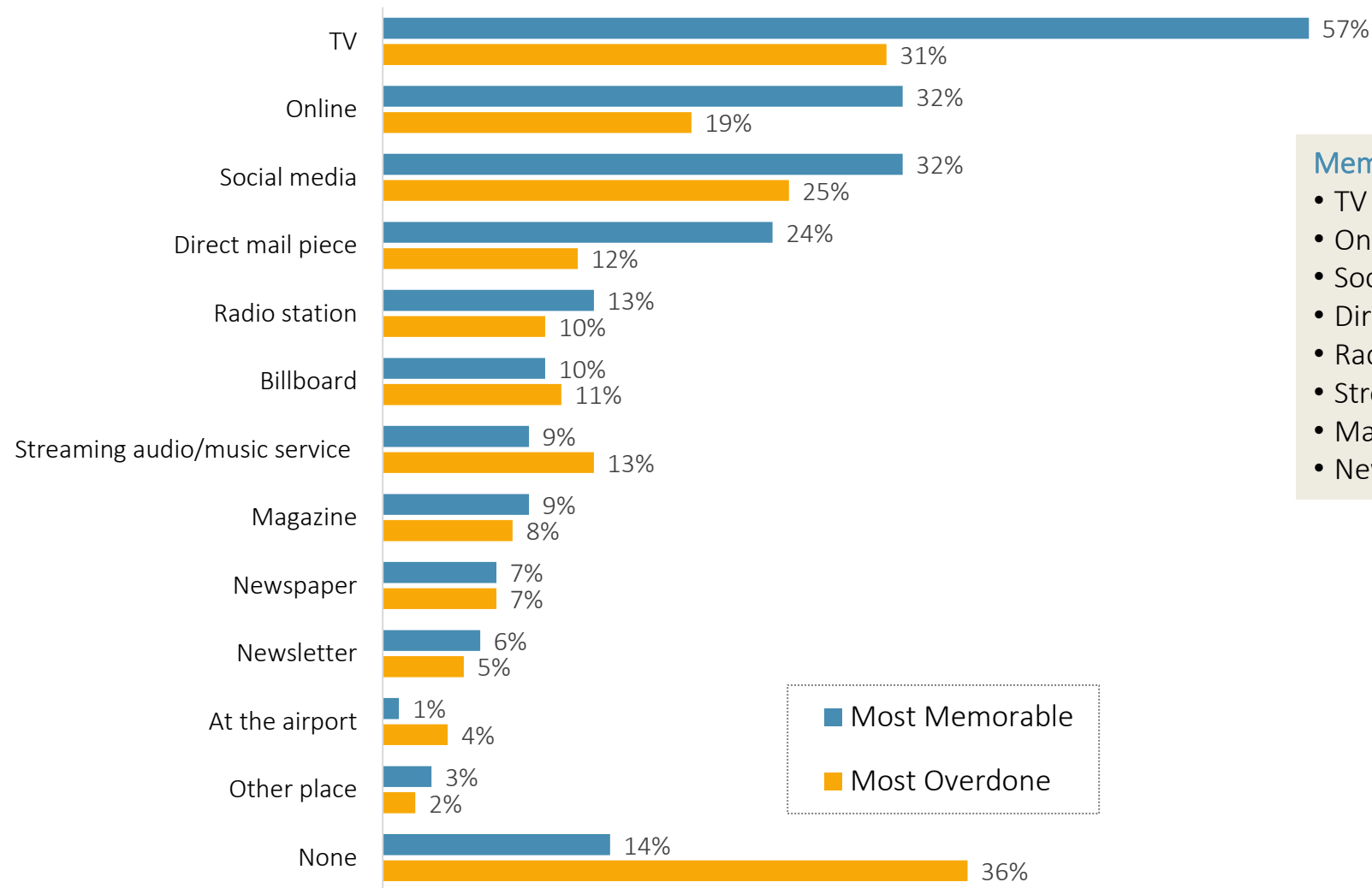
Memorable:
- TV = Men and Gen X and Boomers, Chronic and/or serious condition
- Online ads: Men, Declines with age
- Social media: Declines with age, Healthy
- Direct mail: Boomers and Silent
- Radio: Men
- Streaming audio/Music: Men, Gen Z and Millennials
- Magazines: Boomers
- Newspapers/Newsletters: 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

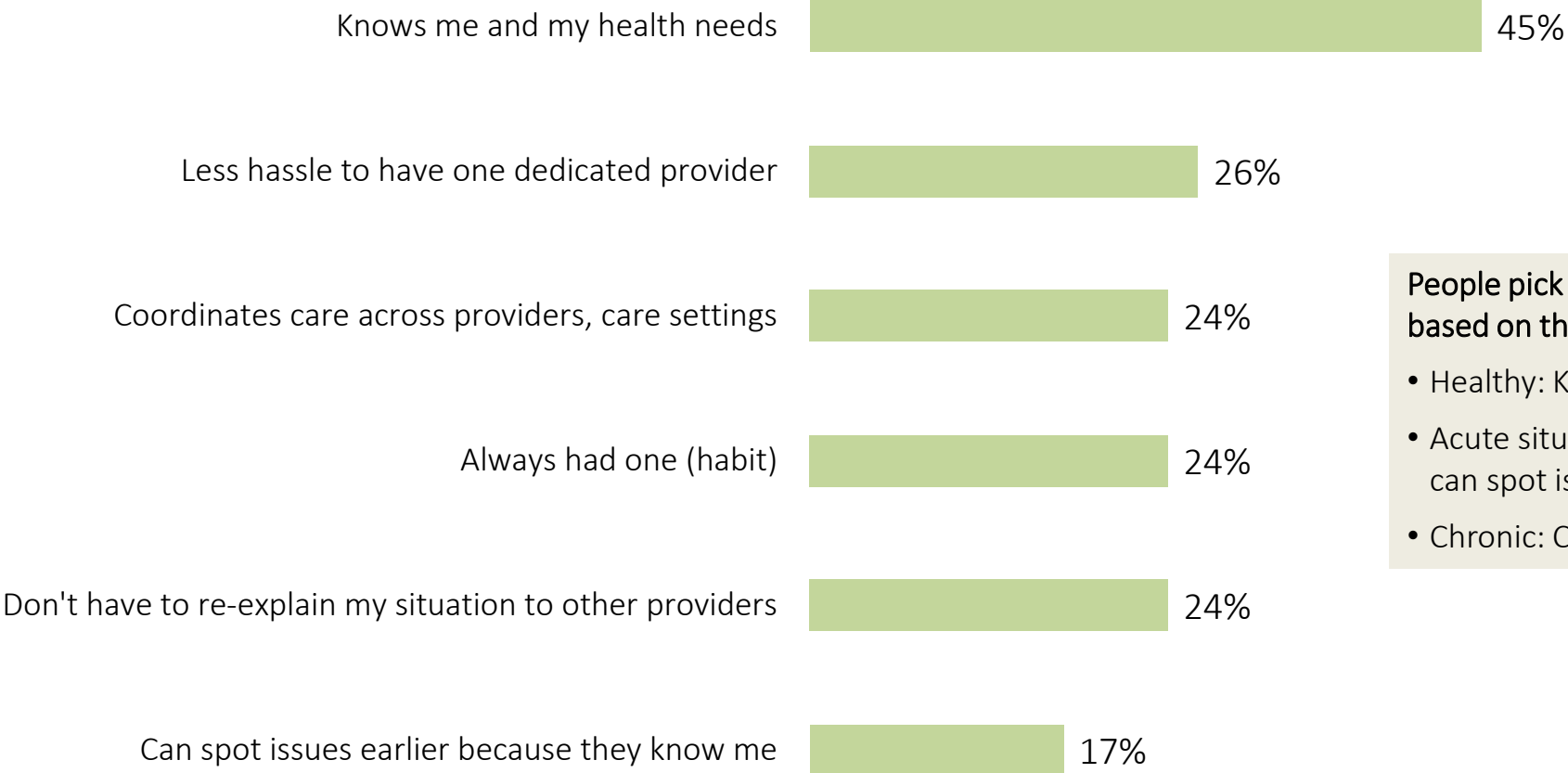2%   Physician's Assistant

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)

Why Chose to Have a Primary Care Provider
(Among the 87% with a PCP)

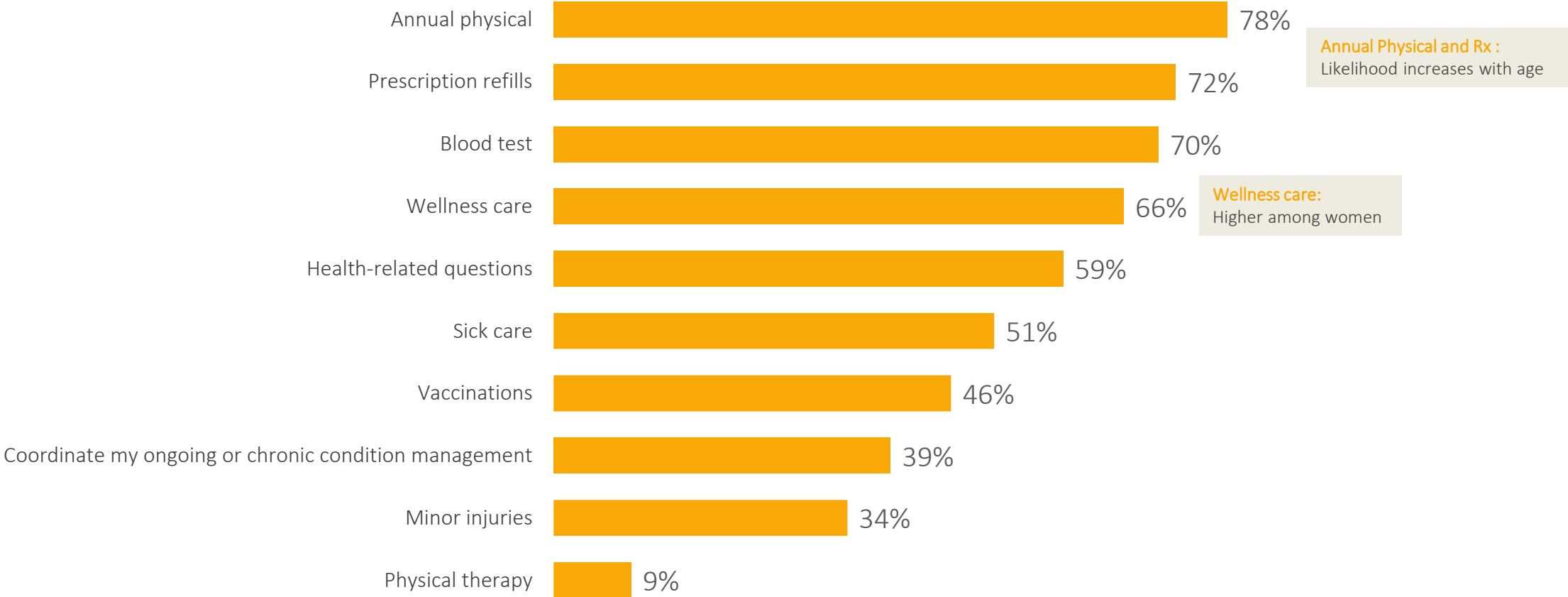| Reason	Percentage
Knows me and my health needs	45%
Less hassle to have one dedicated provider	26%
Coordinates care across providers, care settings	24%
Always had one (habit)	24%
Don't have to re-explain my situation to other providers	24%
Can spot issues earlier because they know me	17%

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

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

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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?

Typically Use Primary Care Provider For…
(Among the 87% with a PCP)

Service	Percentage
Annual physical	78%
Prescription refills	72%
Blood test	70%
Wellness care	66%
Health-related questions	59%
Sick care	51%
Vaccinations	46%
Coordinate my ongoing or chronic condition management	39%
Minor injuries	34%
Physical therapy	9%

Annual Physical and Rx : Likelihood increases with age

Wellness care: Higher among women

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

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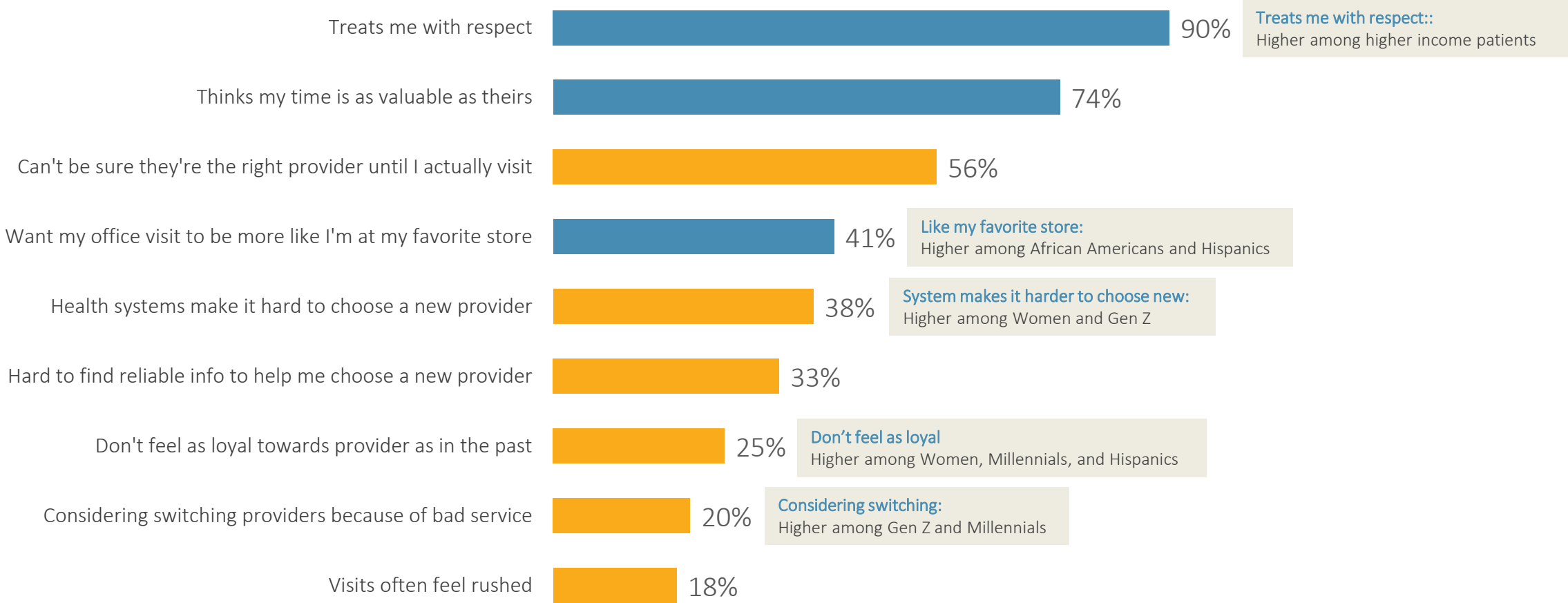
Urgent care is 'Plan B' when "my doctor fails to see me in a timely manner" – Having a strong urgent care strategy (whether in-person or virtually) is key to providing coordinated primary care and keeping people out of the ER

If PCP Not Immediately Available When Needed...

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

Response	%	Note
Go to an urgent care center	32%	← Especially Women, Millennials, and Caucasians
See another doctor at my doctor's office	19%	← Especially Silent and Healthy
See a Nurse Practitioner or PA at my doctor's office	15%	← Especially Gen X and Boomers, Asian Americans
Go to the ER	11%	← Especially Gen Z, and African Americans and Hispanics, Chronic or Acute
Just wait till my primary care provider can see me	8%	
Use a virtual visit app/ talk to a provider on phone, PC	6%	
Go to a retail clinic (e.g., CVS or Walgreens)	4%	
Go to another physician's office that is close by	2%	
Other	1%	
Not sure	2%	

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

Importance of PCP Affiliation with Preferred System

PCP is NOT affiliated with preferred system
31%

Affiliated but would NOT have chosen if not affiliated
44%

Affiliated and would still have chosen if not affiliated
25%

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 ↑

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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 not affiliated with/admit to your preferred health system? (n=630)

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

Importance of Potential New PCP
being Affiliated with Same as Current System

- Not a factor 12%
- Absolutely critical 25%
- Somewhat important 22%
- Very important 41%

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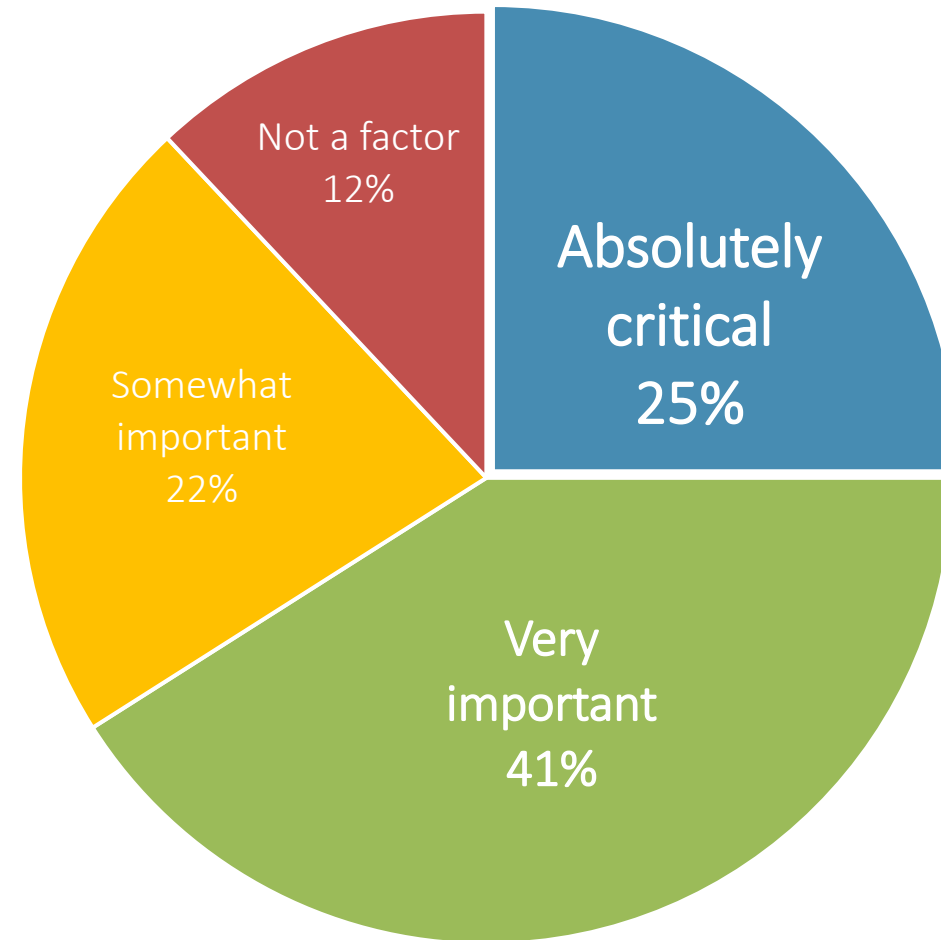
Q9   If your primary care physician retired, moved, or otherwise was no longer able to be your physician, how important would it be to you to stay with a new provider who was affiliated with/admitted to the same health system/hospital? (n=887)
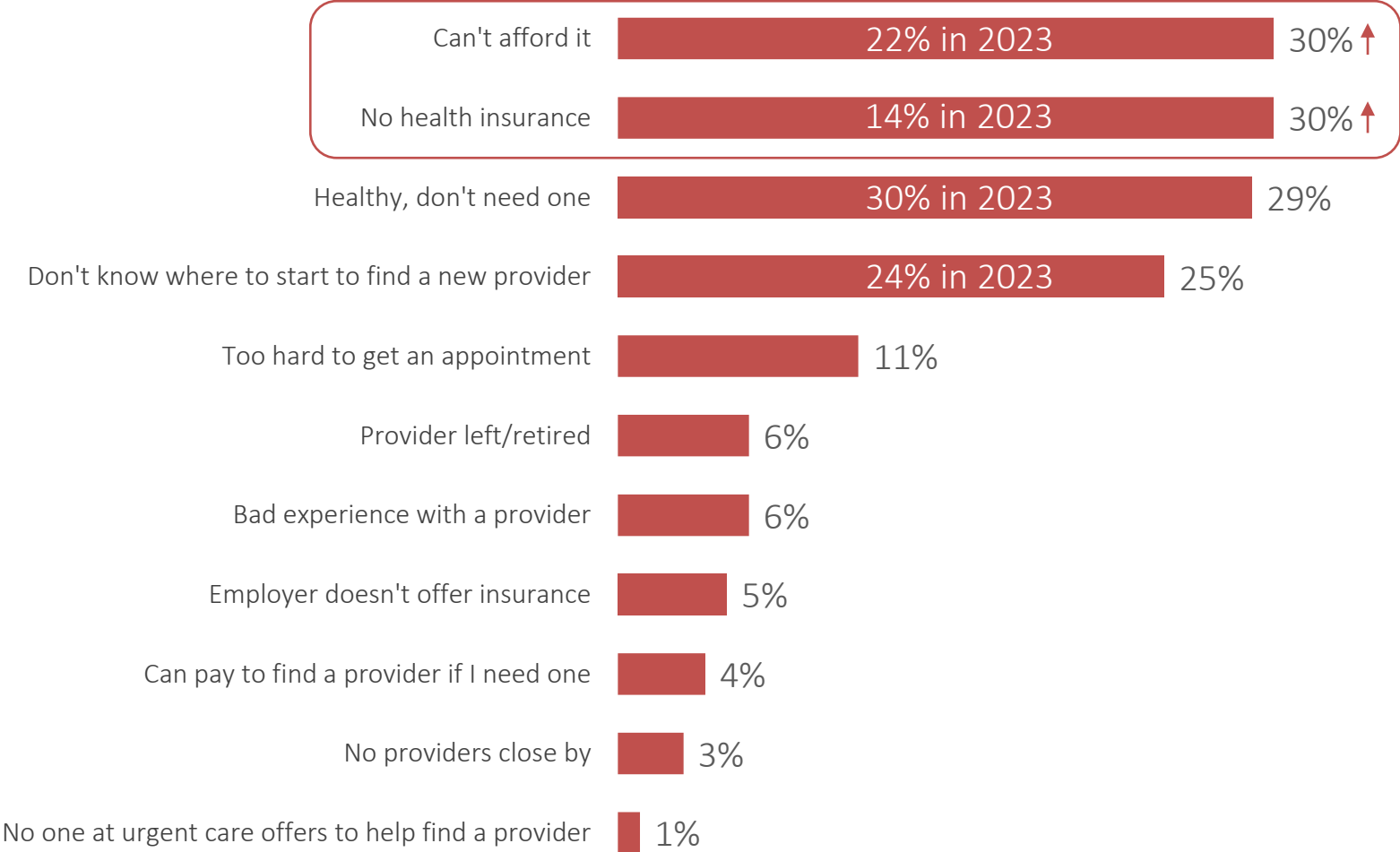
For many, they simply can't afford to have a PCP; mostly likely because they do not have health insurance

Reasons For Not Having a Primary Care Provider
(Among the 13% without a PCP)

Reason	Value
Can't afford it	22% in 2023 — 30% ↑
No health insurance	14% in 2023 — 30% ↑
Healthy, don't need one	30% in 2023 — 29%
Don't know where to start to find a new provider	24% in 2023 — 25%
Too hard to get an appointment	11%
Provider left/retired	6%
Bad experience with a provider	6%
Employer doesn't offer insurance	5%
Can pay to find a provider if I need one	4%
No providers close by	3%
No one at urgent care offers to help find a provider	1%

← Especially Gen Z and African Americans

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

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What Patients Without a PCP do for Routine Care

Urgent care center
- 2024: **39%**
- 2023: 35%
- 2022: 36%

ER
- 2024: **15%**
- 2023: 5%
- 2022: 10%

Retail clinic (e.g., CVS)
- 2024: **10%**
- 2023: 17%
- 2022: 14%

Closest PCP office
- 2024: **7%**
- 2023: 14%
- 2022: 13%

Virtual visit app
- 2024: **3%**
- 2023: 16%
- 2022: 7%

Other
- 2024: **21%**
- 2023: 5%
- 2022: 6%

Not sure
- 2024: **5%**
- 2023: 8%
- 2022: 21%

Legend:
- 2024
- 2023
- 2022
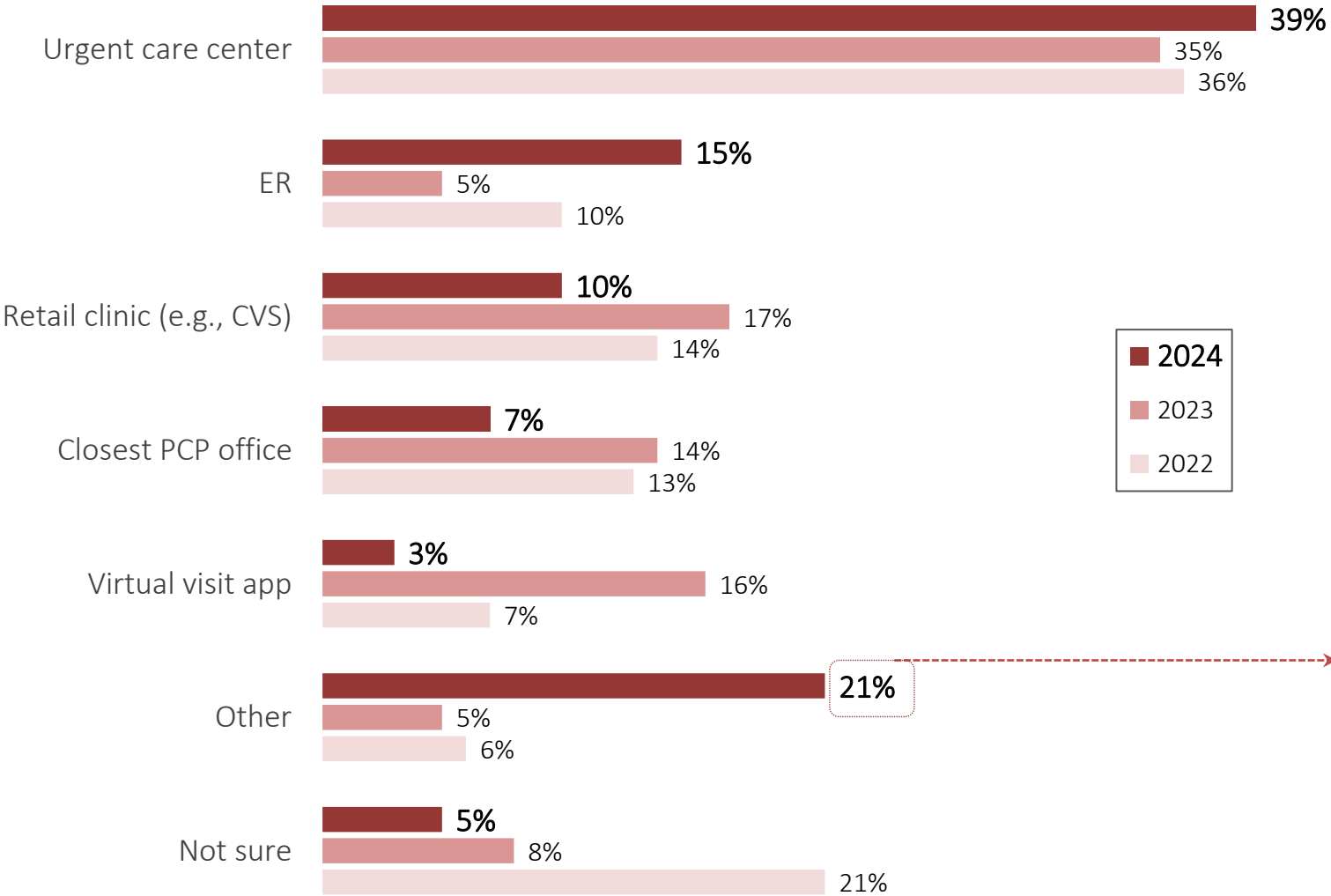
Other responses:
- *Take care of it myself.*
- *Treat myself with over-the-counter medication.*
- *Thug it out.*
- *Self treat.*
- *For anything minor/routine I take care if it myself, even if it takes weeks or months to get better.*
- *Take care of myself and I'm assisted by a neighbor who was a nurse or by my sister.*
- *Take care of it at home.*
- *Self-heal.*

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Q14   What do you typically do for routine sick care or minor injuries? (n=118)

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PRIMARY CARE ACCESS

63%
of Americans have had difficulties accessing primary care for →

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!

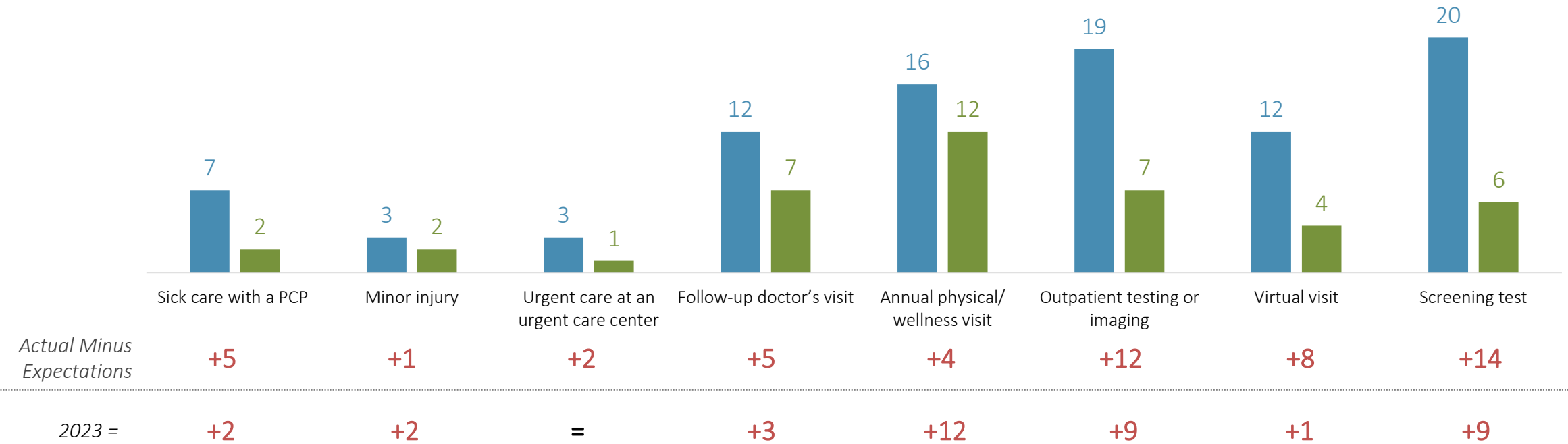**Actual Visit Wait vs. Expectations**

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)

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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

■ How quickly was seen (mean=11 days) ■ Acceptable amount of time (mean=5 days)

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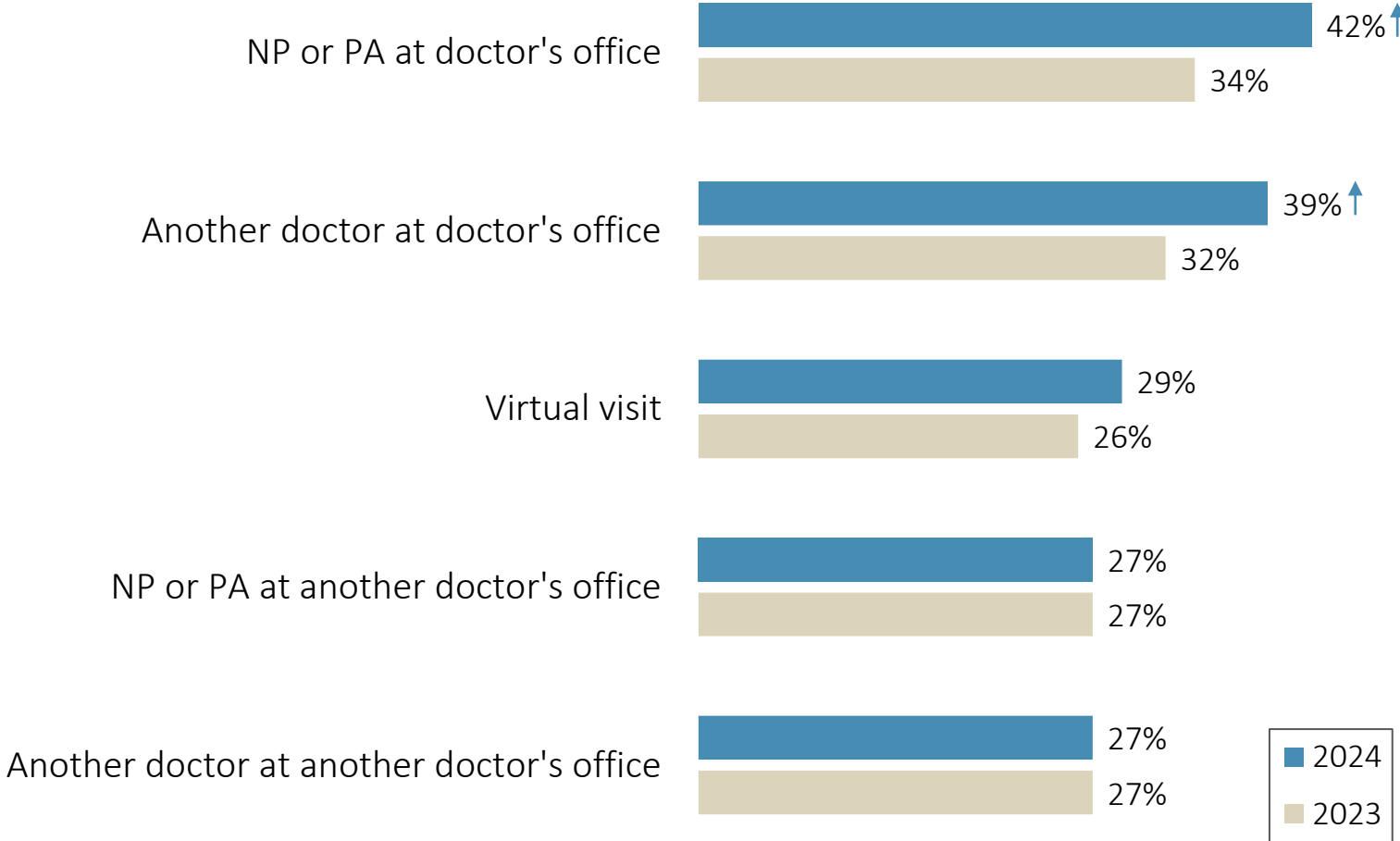Q18 What would an acceptable time have been to be seen for this appointment for {RESTORE Q16 RESPONSE}? (n=546)

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

Patient's Willingness to Change Appointment Type to be Seen

NP or PA at doctor's office
- 2024: 42% ↑
- 2023: 34%

Another doctor at doctor's office
- 2024: 39% ↑
- 2023: 32%

Virtual visit
- 2024: 29%
- 2023: 26%

NP or PA at another doctor's office
- 2024: 27%
- 2023: 27%

Another doctor at another doctor's office
- 2024: 27%
- 2023: 27%

■ 2024
■ 2023

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)

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

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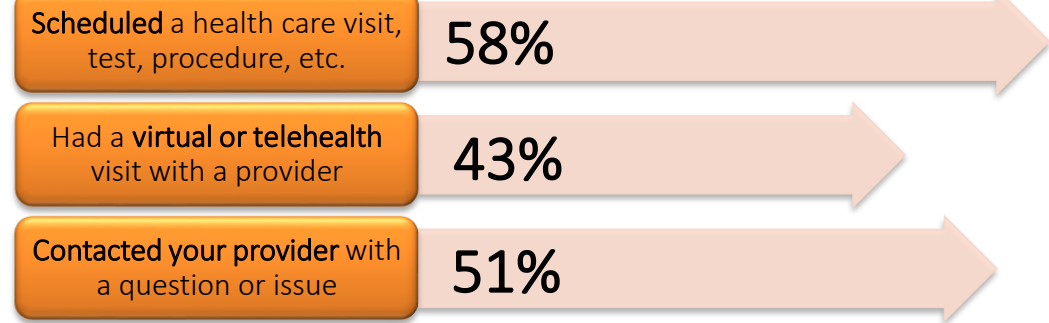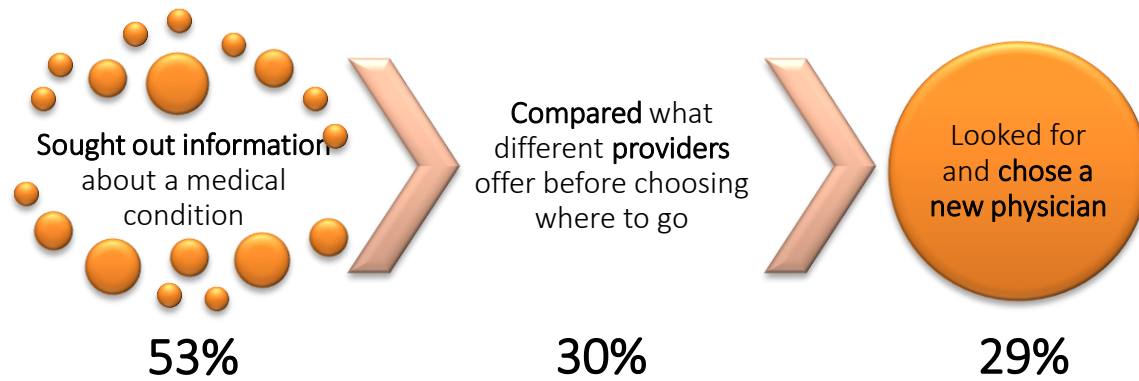Q21 How much of an impact did that issue have on your overall healthcare experience? (n=46 - 154)

Page 25
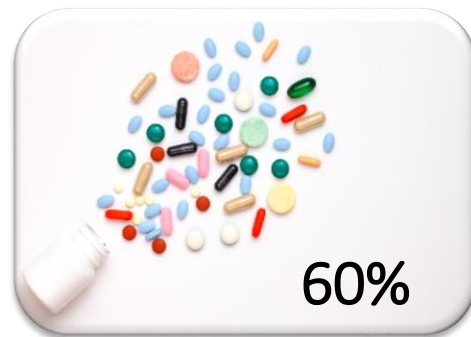
THE DIGITAL HEALTH CARE HIGHWAY

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**
60%

Paid a medical bill
54%

Share condition-related data with your provider using a smart watch or other wearable device
19%

Manage your overall health using a digital tool that interacts with your provider
36%

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

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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

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

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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)

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)
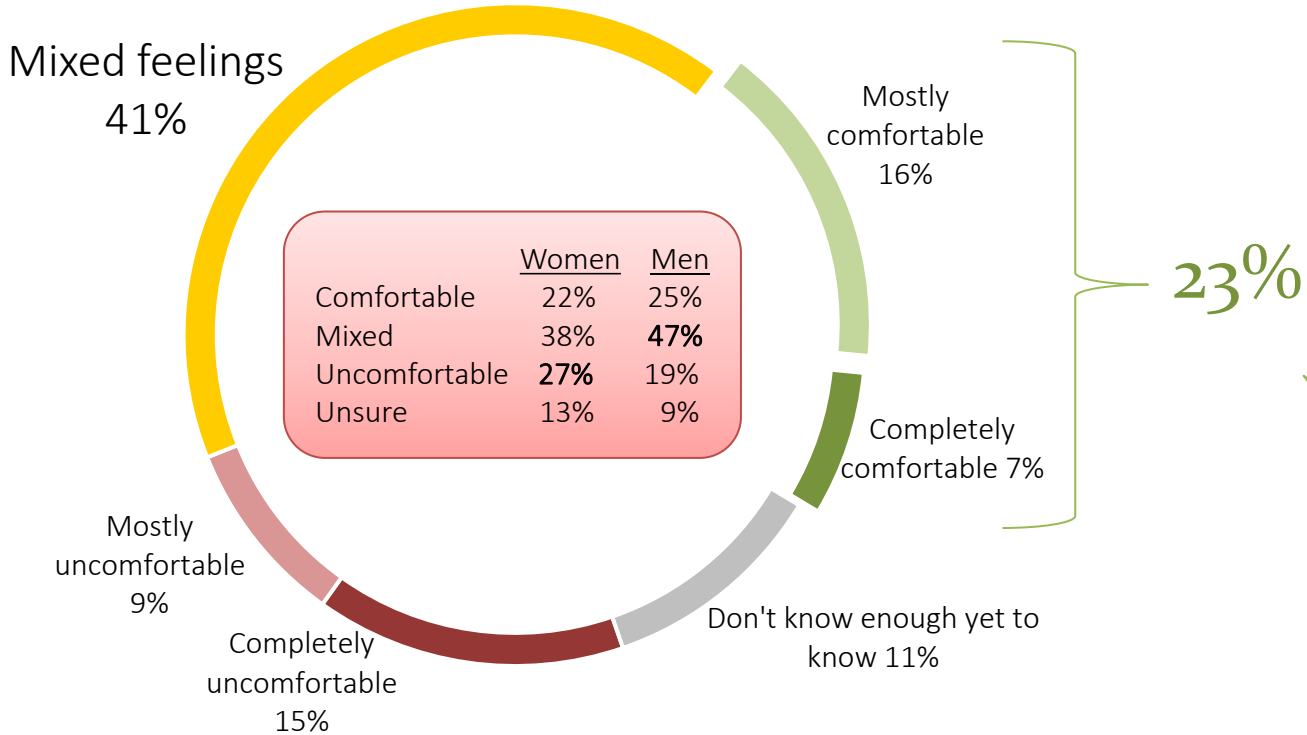
Not sure: 14% (11% 2023)

Especially among Women, Millennials and Gen X, and Parents

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)

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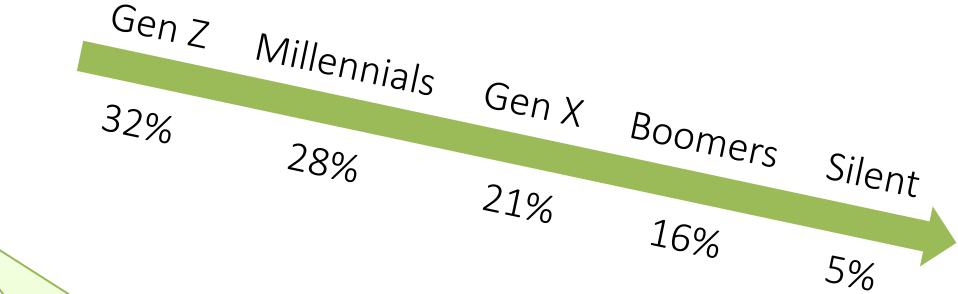
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COMFORT LEVEL WITH AI

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

Mixed feelings
41%

Mostly comfortable
16%

Completely comfortable 7%

Don't know enough yet to know 11%

Completely uncomfortable
15%

Mostly uncomfortable
9%

	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

Gen Z
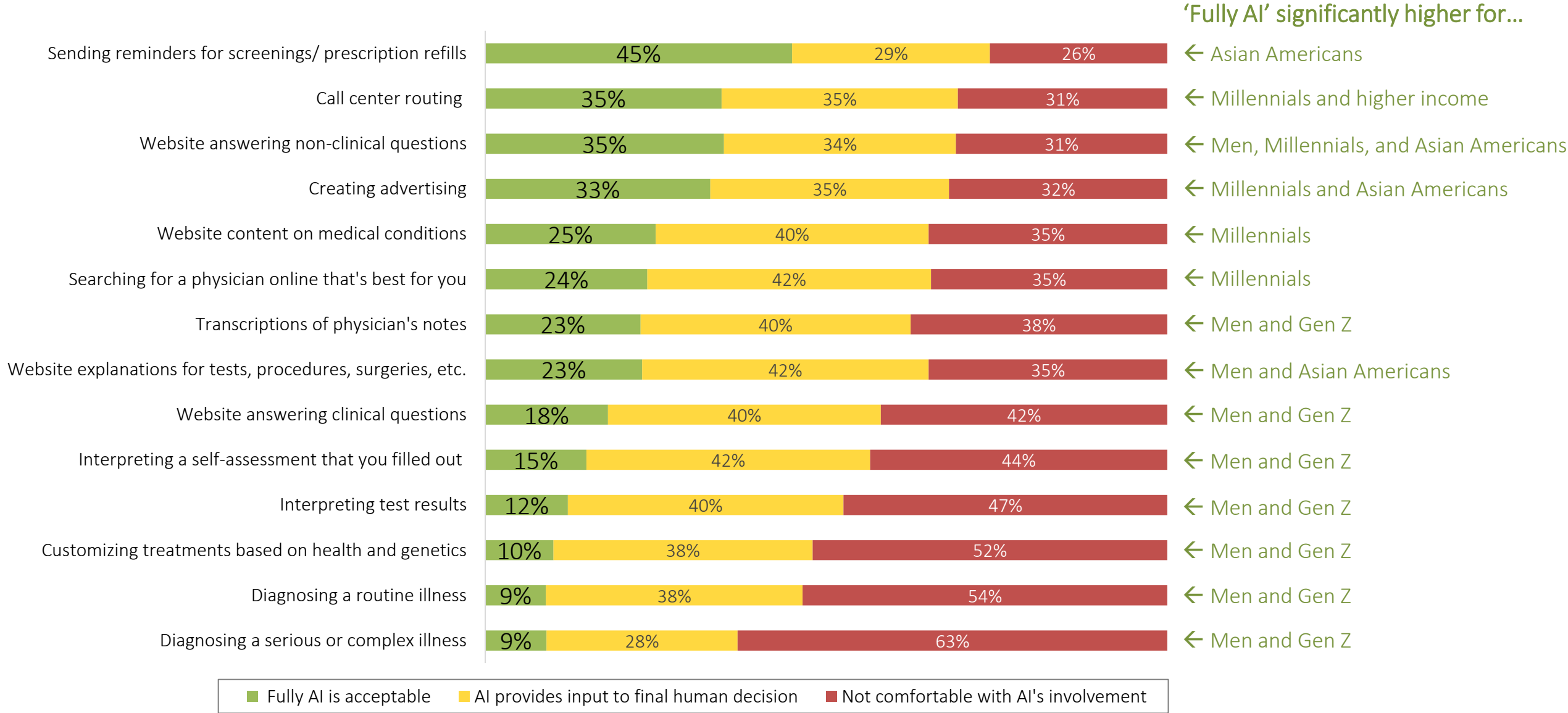32%

Millennials
28%

Gen X
21%

Boomers
16%

Silent
5%

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.

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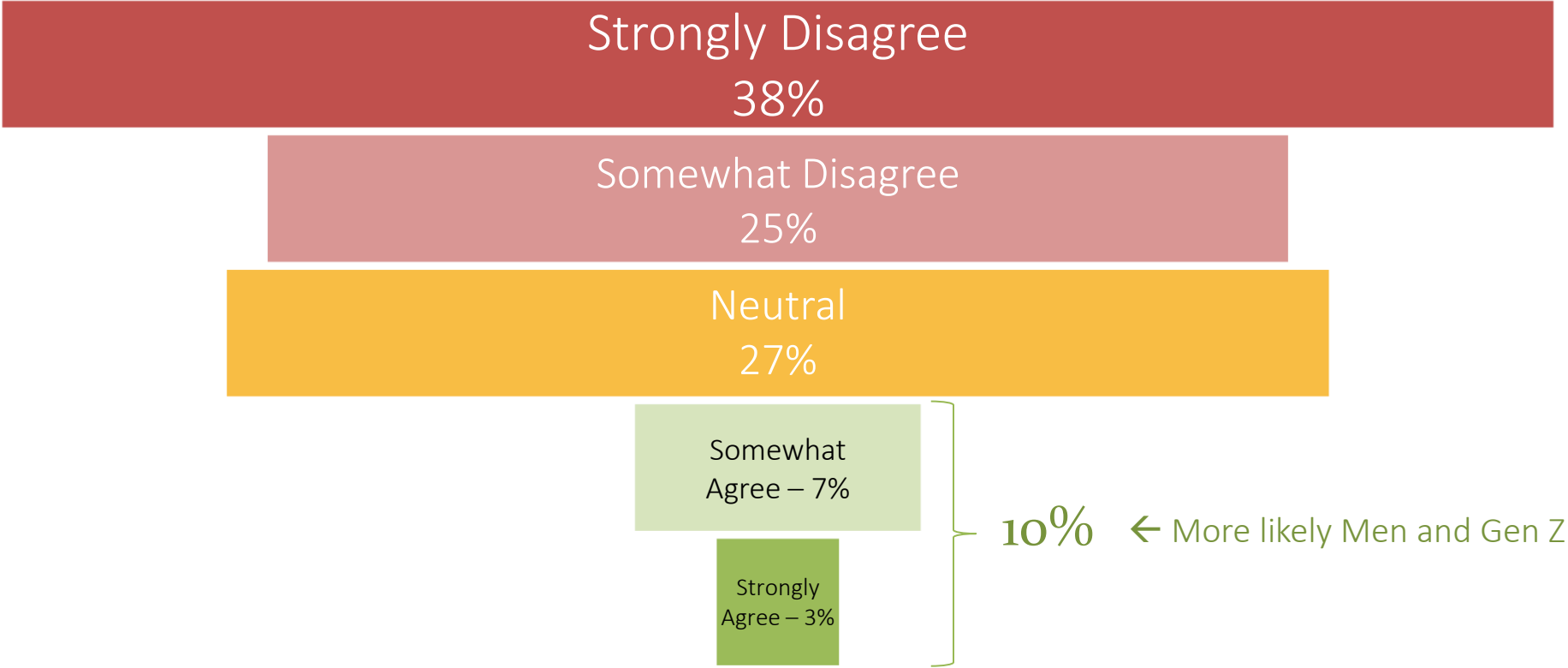^ = description of AI provided

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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...

Interaction	Fully AI is acceptable	AI provides input to final human decision	Not comfortable with AI's involvement	Fully AI significantly higher for...
Sending reminders for screenings/ prescription refills	45%	29%	26%	← Asian Americans
Call center routing	35%	35%	31%	← Millennials and higher income
Website answering non-clinical questions	35%	34%	31%	← Men, Millennials, and Asian Americans
Creating advertising	33%	35%	32%	← Millennials and Asian Americans
Website content on medical conditions	25%	40%	35%	← Millennials
Searching for a physician online that's best for you	24%	42%	35%	← Millennials
Transcriptions of physician's notes	23%	40%	38%	← Men and Gen Z
Website explanations for tests, procedures, surgeries, etc.	23%	42%	35%	← Men and Asian Americans
Website answering clinical questions	18%	40%	42%	← Men and Gen Z
Interpreting a self-assessment that you filled out	15%	42%	44%	← Men and Gen Z
Interpreting test results	12%	40%	47%	← Men and Gen Z
Customizing treatments based on health and genetics	10%	38%	52%	← Men and Gen Z
Diagnosing a routine illness	9%	38%	54%	← Men and Gen Z
Diagnosing a serious or complex illness	9%	28%	63%	← Men and Gen Z

■ Fully AI is acceptable   ■ AI provides input to final human decision   ■ Not comfortable with AI's involvement

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Q25   What level of comfort do you have with AI's involvement in each of these health care interactions? (n=1,005)   Page 33

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

Strongly Disagree
38%

Somewhat Disagree
25%

Neutral
27%

Somewhat Agree – 7%

Strongly Agree – 3%

10% ← More likely Men and Gen Z

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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)

Page 34

HEALTH STATUS AND HEALTHY BEHAVIORS

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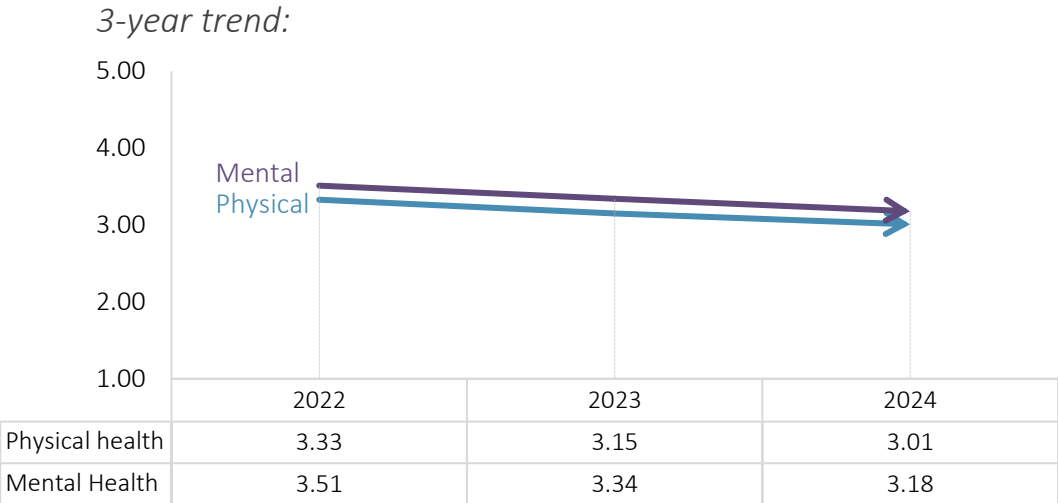
Current Health Status

Not sure
3%

Both serious illness/injury AND
chronic/congenital condition, 6%

Recent serious illness,
injury , 6%

Chronic or congenital
condition
23%

Generally healthy
62%

Gen X and Boomers ↑
White ↑
Have a PCP ↑

Gen Z and Millennials ↑
Hispanics ↑
No PCP ↑
Higher income ↑

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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:

Mental
Physical

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

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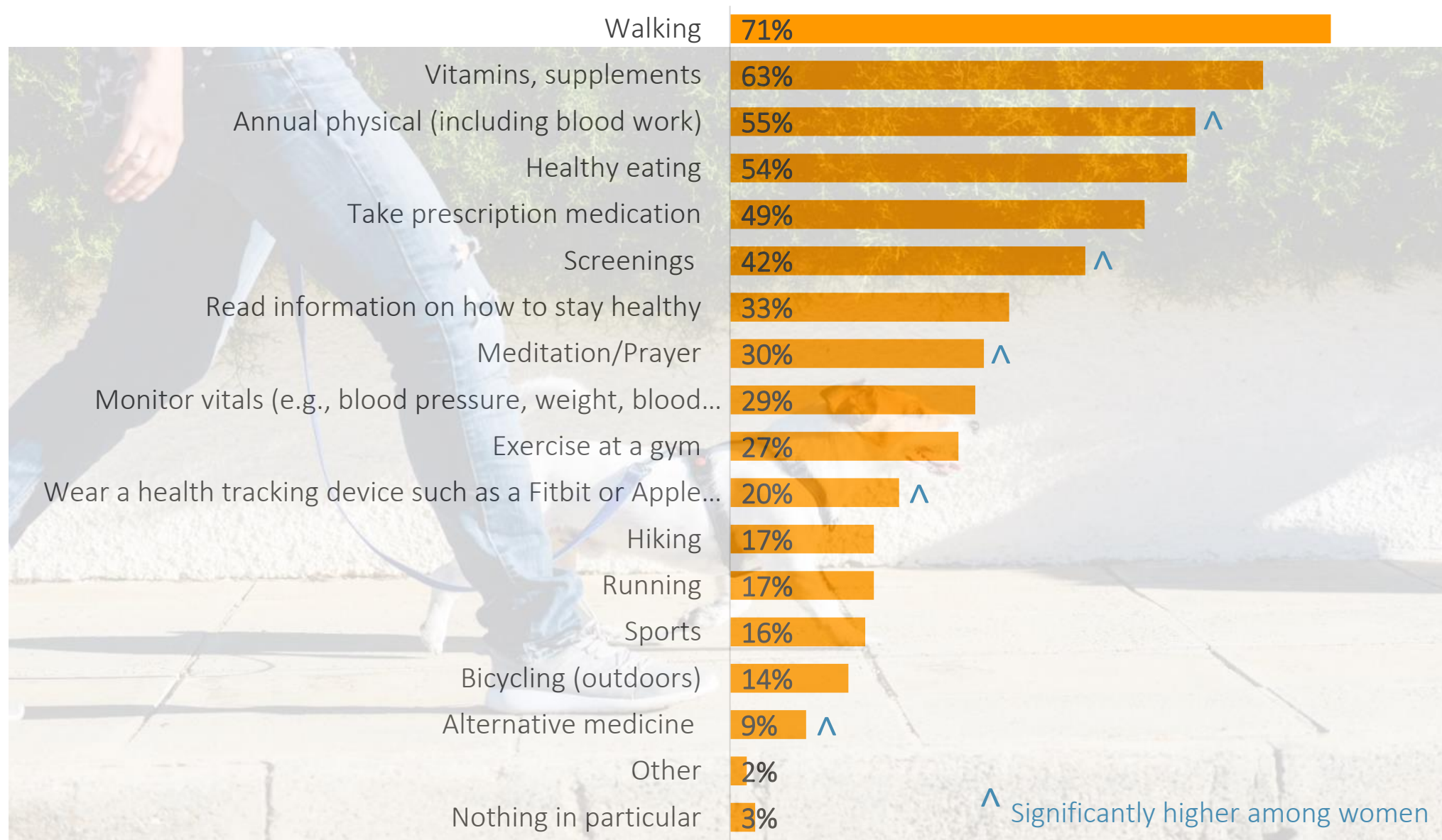Q28   In general, would you say your overall _____ (physical/ mental) health is…? (n=1,005)

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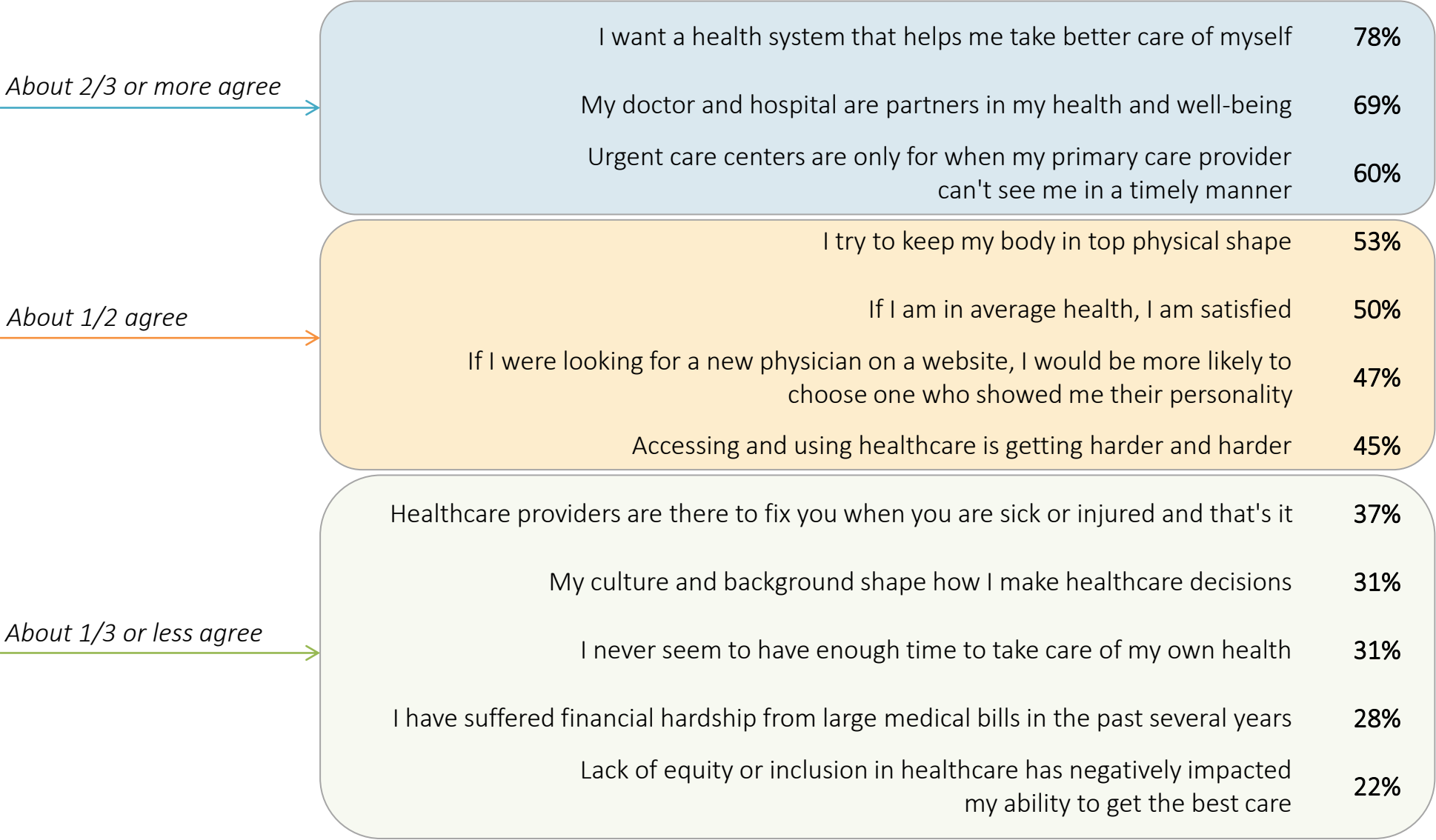
Top Health Concerns & Conditions

Concern/Condition	%
Take prescription medication	39%
Anxiety	34%
Family history of chronic disease	30%
Depression	29%
More than 20 pounds overweight	29%
Chronic back problems/joint pain	20%
Arthritis	20%
Chronic low energy or fatigue	17%
Smoker	15%
Migraines	14%
Asthma	13%
No time to myself	13%
Diabetes	10%

Increases with age
White patients
Have a PCP
Chronic condition

All four of these: Females, Lower income
Anxiety and Depression: Gen Z and Millennials

Gen X and older, Chronic and Acute patients

Women, Chronic and Acute patients

Lower income
Asthma and no time for myself: Gen Z

Men, Older, Chronic condition

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Americans report staying healthy by... how can your brand become 'relevant' on this journey?

Activity	Percentage
Walking	71%
Vitamins, supplements	63%
Annual physical (including blood work)	55% ^
Healthy eating	54%
Take prescription medication	49%
Screenings	42% ^
Read information on how to stay healthy	33%
Meditation/Prayer	30% ^
Monitor vitals (e.g., blood pressure, weight, blood...)	29%
Exercise at a gym	27%
Wear a health tracking device such as a Fitbit or Apple...	20% ^
Hiking	17%
Running	17%
Sports	16%
Bicycling (outdoors)	14%
Alternative medicine	9% ^
Other	2%
Nothing in particular	3%

^ Significantly higher among women

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	
<u>Rank 1st 2nd or 3rd</u>	<u>Key Segments</u>
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

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

Qualities Valued Most in Life
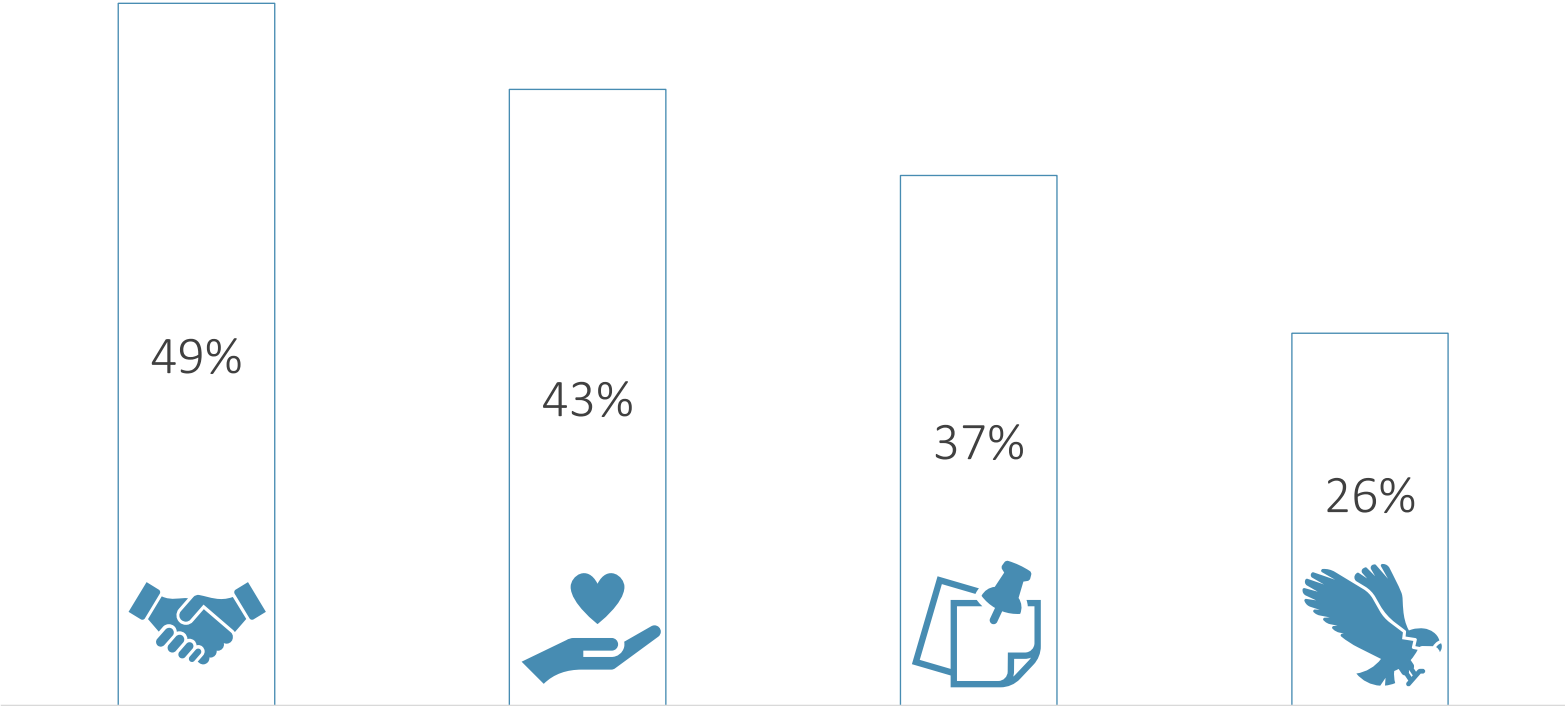
Trustworthiness	Compassion/Empathy	Dependability	Freedom
49%	43%	37%	26%
	More likely women	Increases with age	More likely men
	Increases with age		Gen Z

- 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.

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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]

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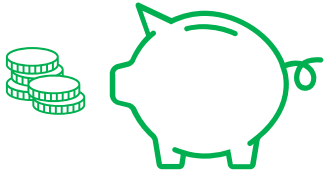
More likely to choose least expensive option:
– Gen Z: 51%
– Millennials: 54%
– African Americans: 59%
– Lower income: 55%

% who Price Shopped by Service:

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)

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While paying a health care bill online declines with age, satisfaction with online bill paying increases with age
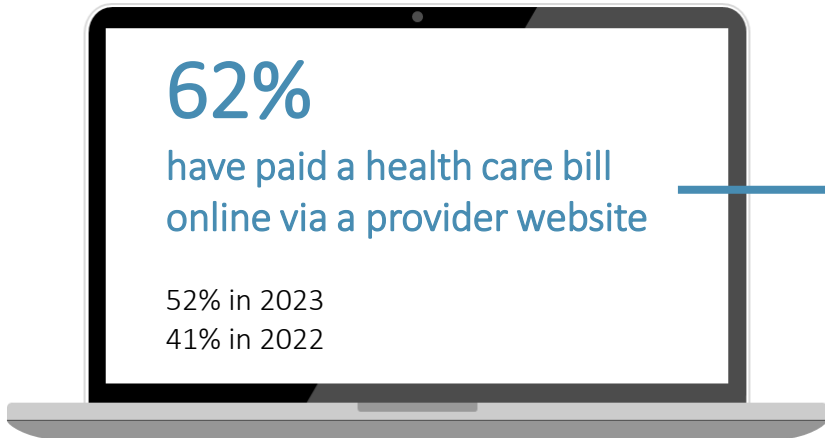
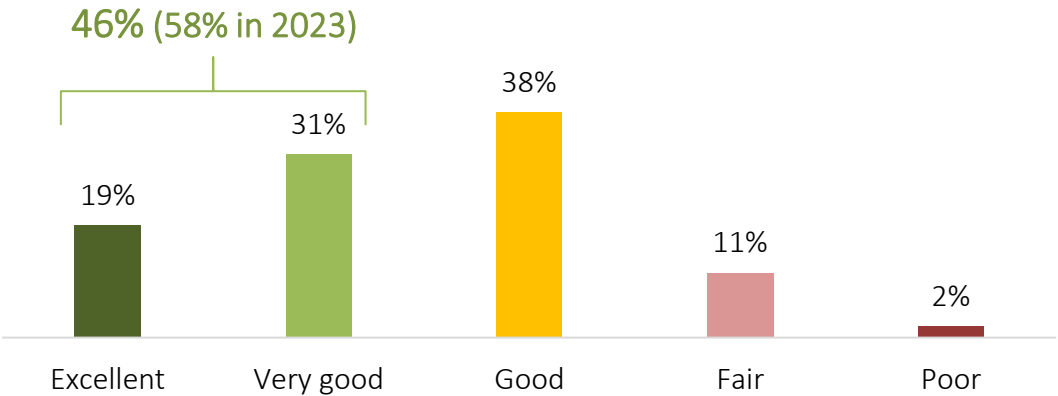## Preferred Method to Pay a Health Care Bill
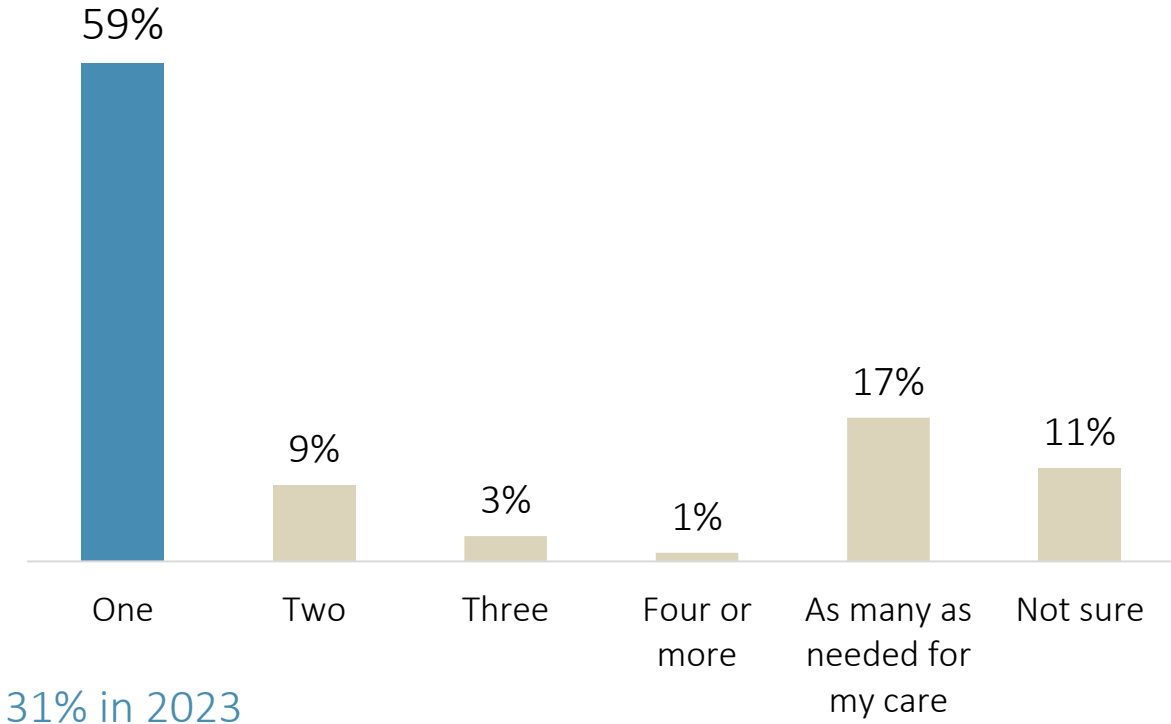
67%
Online

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

46% (58% in 2023)

- Excellent: 19%
- Very good: 31%
- Good: 38%
- Fair: 11%
- Poor: 2%

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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

- One: 59%
- Two: 9%
- Three: 3%
- Four or more: 1%
- As many as needed for my care: 17%
- Not sure: 11%

31% in 2023

79% say **ONE MONTH** is the longest it should take for you to send a bill

76% in 2023

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NATIONAL HOSPITAL BRANDS

Nationally Recognized for Clinical Excellence
From the US News & World Report's 2023-2024 Honor Roll

Hospital	%
Mayo Clinic (Rochester, Minnesota)	46%
Johns Hopkins Hospital (Baltimore)	45%
Cleveland Clinic	23%
Cedars-Sinai Medical Center (Los Angeles)	23%
Mount Sinai Hospital (New York City)	19%
UCLA Medical Center (Los Angeles)	17%
Stanford Hospital (Stanford, California)	10%
Massachusetts General Hospital (Boston)	10%
Brigham and Women's Hospital (Boston)	7%
New York-Presbyterian Hospital (New York City)	7%
Vanderbilt University Medical Center (Nashville)	7%

Hospital	%
Northwestern Memorial Hospital (Chicago)	5%
NYU Langone Hospital (New York City)	5%
Penn Presbyterian Medical Center (Philadelphia)	4%
Houston Methodist Hospital	4%
Barnes-Jewish Hospital (St. Louis)	3%
UC San Diego Medical Center	3%
University of Michigan Medical Center	3%
UCSF Medical Center (San Francisco)	3%
Rush University Medical Center (Chicago)	2%
North Shore University Hospital (Manhasset, New York)	2%
UT Southwestern Medical Center (Dallas)	2%

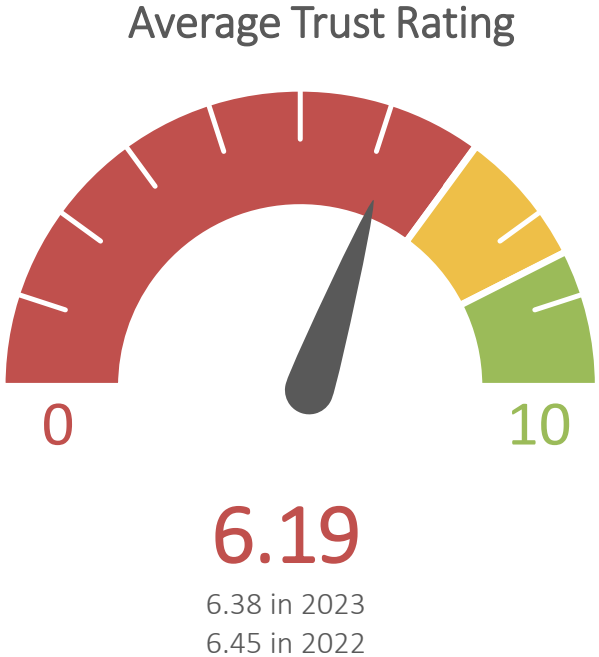**28%** do not know enough to pick any hospital

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)
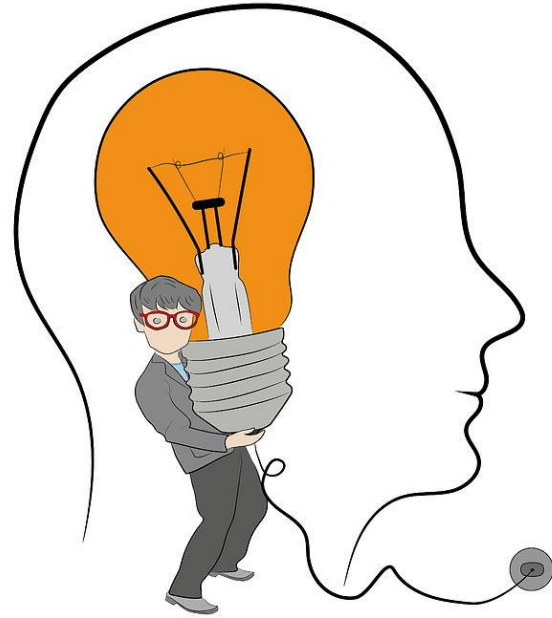
TRUSTWORTHINESS OF HEALTH CARE PROVIDERS

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

0 — 10

6.19

6.38 in 2023
6.45 in 2022

	Do not trust them at all	Trust them completely	2022	2023	2024
Children's Hospitals		7.77	7.44	7.47	7.77
Physicians		7.55	7.34	7.39	7.55
University Hospitals (Teaching/ Academic)		6.92	6.92	6.89	6.92
Non-profit hospitals		6.88	6.84	6.81	6.88
CVS		6.47	6.68	6.54	6.47
WebMD		6.23	6.38	6.44	6.23
Google		6.08	6.24	6.28	6.08
US News & World Report Hospital Rankings		5.92	6.00	5.93	5.92
Amazon		5.82	6.37	6.22	5.82
For-profit hospitals		5.70	6.20	5.87	5.70
Walmart		5.63	5.89	5.97	5.63
Health insurance companies		5.53	6.16	5.98	5.53
Apple		5.32	5.96	5.96	5.32
Pharmaceutical companies		4.84	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

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- **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 contact:

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