SHSMD26 CONNECTIONS

Health Care Marketing, Strategy & Communications

American Hospital Association Conference

September 27-29 ⚓ Baltimore

The Patient Next Door: Meet the new healthcare consumer

- Mallory Roman, PhD, Director, Research and Marketing Science, BPD Health
- Emily Baker, VP, Innovation, BPD Health

AHA Events

Today’s Agenda

- About BPD
- Unpacking the BPD Research Initiative’s latest market research on healthcare consumers’ attitudes and perceptions on:
  - Costs
  - Access
  - Convenience
  - AI
  - Marketing presence
  - Generational healthcare trends
- Learning objectives
  - Understand how and why healthcare consumer behavior is changing, including the impact of cost, access, and digital tools
  - Learn how patients are making care decisions before engaging with providers, and what influences those choices
  - Gain practical insight into what these shifts, including early signals from Gen Z mean for how healthcare leaders should adapt their approach

With you today

Mallory Roman, PhD

Director, Research and Marketing Science
BPD Health

Emily Baker

VP, Innovation
BPD Health

Society for Health Care Strategy & Market Development℠

From the largest health systems to academic institutions and industry instigators, ***we partner with healthcare's very best.***

HCA Healthcare	Adventist Health	UNC Health	Google Health
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UCSF Health	At the Forefront UChicago Medicine	3M	The University of Texas MD Anderson Cancer Center
Johnson&Johnson	University of California Health	Trinity Health	rwjf robert wood johnson foundation

Healthcare consumers are changing. We’re tracking it in real time.

- We field national studies of healthcare consumers across the country, uncovering insights into:

- Care-seeking behavior
- Service line decision drivers
- Price sensitivity and financial confidence
- Digital expectations and AI sentiment
- Brand perception and loyalty dynamics

Research Methodology

Surveys were run online with national general population samples.

Survey results are weighted by national statistics for age and gender.

The Gen Z survey purposefully recruited 1,000 Gen Z-aged participants, and the other 1,000 recruits had natural fallout across other generations.

SURVEY	FIELD DATES	SAMPLE SIZE	AGE RANGE
Marketing Preferences and Impressions	Oct. 21, 2025	1,000	26-99
Healthcare Navigation and Access	Nov. 18, 2025	1,000	26-99
Law and Policy	Dec. 16, 2025	1,000	22-99
Healthcare Trends and Outlooks	Dec. 24, 2025	1,000	22-99
Gen Z	Dec. 19 & 31, 2025	2,000	18-99
Preference and Loyalty	Apr. 8, 2026	1,000	22-99
AI	May 26, 2026	1,000	18-99
Institutional Trust	June 26, 2026	1,000	22-99

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What We Discovered

01

Disruption

Cost and access barriers are actively reshaping patient behavior.

02

Essential

Convenience is now a gating factor, not a preference.

03

Frontloaded

Healthcare decisions are increasingly made before patients enter the system.

04

Activation

Marketing is a critical part of the healthcare navigation layer.

05

Shift

Younger generations signal a different future.

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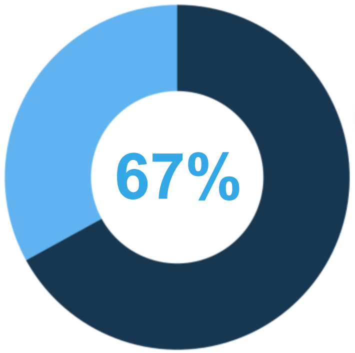
Takeaway 1

Patients are delaying care due to cost and access perceptions.

Cost is a barrier and a decision-making filter.

Our December survey found **60% of respondents expect healthcare costs to increase in 2026.**

- The most common factors were insurance premium increases and general inflation.
- When costs rise, two-thirds say they would change their behavior, with over 13% reporting delaying needed care.
- Other behavior changes include self-managing a condition, seeing a provider less often, or skipping optional care.



Of consumers say they'll **change their behavior** if healthcare costs rise.

- Delay care, **13%**
- Change insurance plans, **12%**
- See financial assistance, **12%**
- Switch healthcare providers, **11%**
- Use virtual or lower-cost options, **10%**
- Skip optional care, **9%**

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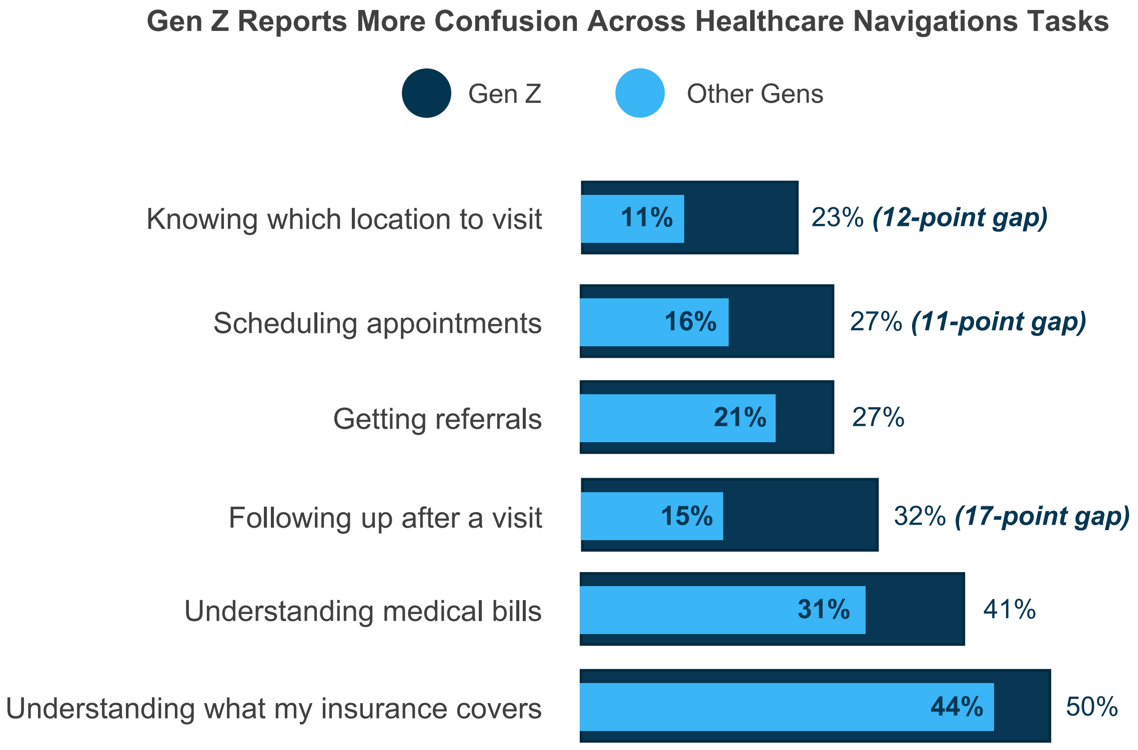
When navigation fails, patients go elsewhere or delay care.

Younger consumers experience more friction with basic navigation tasks.

Gen Z is significantly more likely than older groups to report confusion around scheduling appointments (27%), following up after visits (32%), and knowing which location to visit (23%).

In contrast, older adults report fewer navigation challenges, suggesting that experience navigating the healthcare system reduces uncertainty over time.



What it means for health systems:

When patients perceive higher costs and their wallets are already squeezed, many will self-manage, skip, or find a lower-friction alternative.

How much demand are you losing before it ever shows up in scheduling data?

Questions to bring back to your team:

- Do you know where in your patient journey cost uncertainty is causing people to disengage — and can you quantify it?
- Is coverage information reaching patients before they decide whether to seek care?
- If 67% of consumers say they'll change behavior, what's your plan to retain the ones most at risk of leaving the system entirely?

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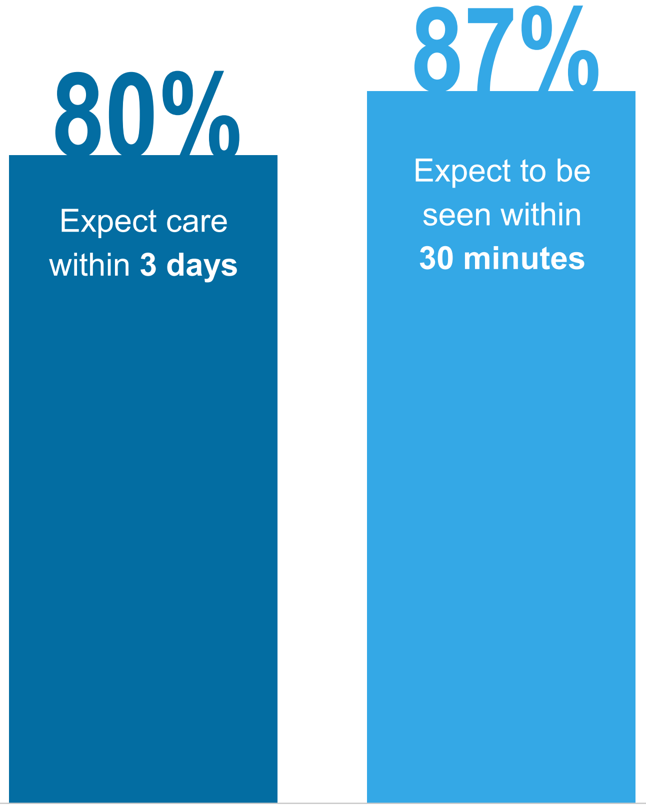
Takeaway 2

Convenience is the price of entry.

Convenience is a top decision-making filter.

If care does not fit within a patient's time, location, and scheduling constraints, it is often excluded before other factors, like quality or reputation, are considered.

Consumers have low tolerance for waiting for care



63% Of people with a system preference would wait 2 weeks or less before going elsewhere

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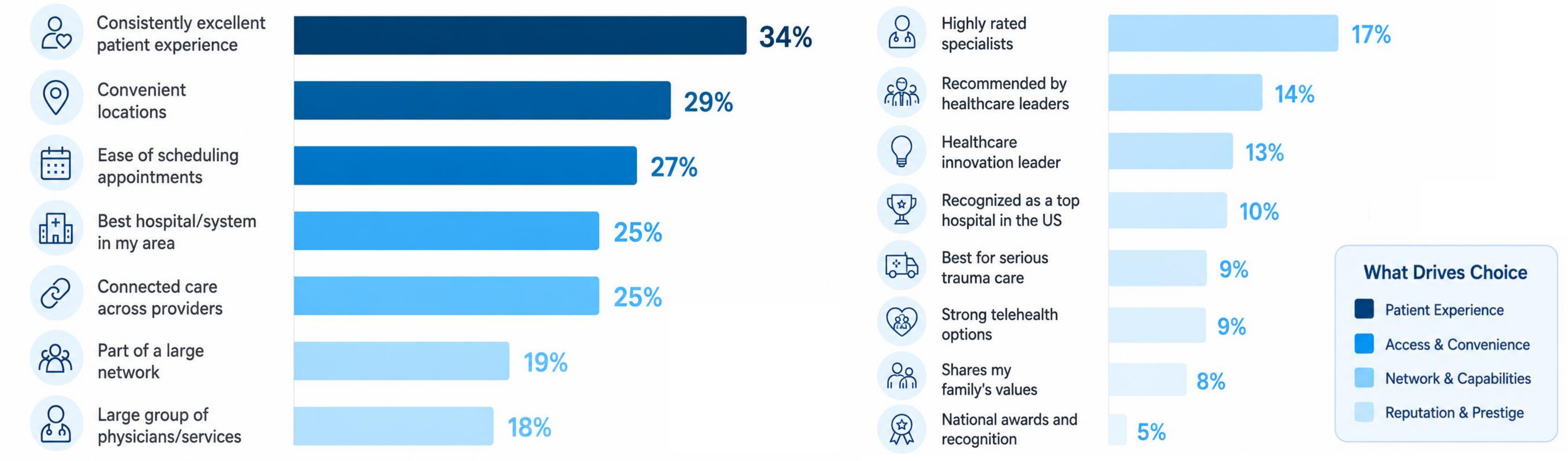
What matters most in choosing a healthcare provider?

Patient access and experience drive provider choice.



% of Respondents, BPD Healthcare Research Study. "November Monthly Survey."

Care is splitting between speed and trust.

40%

say they would go to urgent care first when traveling.

- 39% for stitches
- 36% for same-day, non-urgent care.

54%

would go to their PCP first for minor illnesses.

Even for major illnesses,
41% still start with primary care.

1/3

of consumers report increased comfort with nontraditional providers.

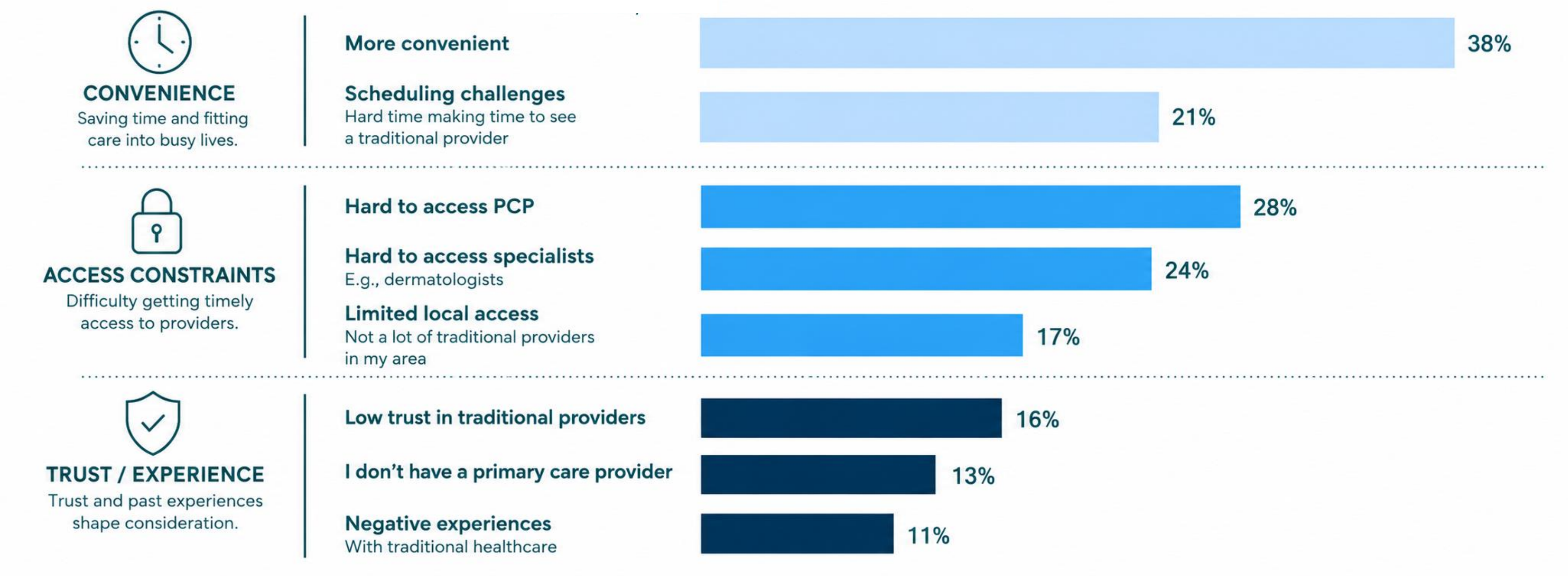
Trust increases when providers:

- have physical locations (50%)
- employ medical professionals (32%)
- are affiliated with established health systems (29%)

And where access is lacking, other pathways exist.

The top reasons for respondents' willingness to consider using **non-traditional healthcare services** like Amazon Health/One Medical are convenience and difficulty getting in to see a doctor.

If you would consider using (or have used) a non-traditional healthcare service like Amazon One Medical or Nurx, **why would you consider it (or why did you use it)?**



N = 709 (respondents did not see this question if they responded very uninterested or uninterested to "How interested are you in non-traditional healthcare services like Amazon Health/One Medical, Hims/Hers, or Nurx?")

What it means for health systems:

Reputation, clinical quality and patient experience are key, but only after a patient decides you're accessible enough to consider.

When 80% of consumers expect care within three days and 87% expect to be seen within 30 minutes, access is a filter.

Health systems can either compete on convenience, or risk conceding volume to those who do.

Questions to bring back to your team:

- Are you measuring time-to-appointment the way patients experience it, or the way your scheduling system reports it?
- Where are you losing volume to urgent care, retail clinics, or virtual-first competitors?
- If a patient can't get an appointment with you, do they know where else in your system they can go?

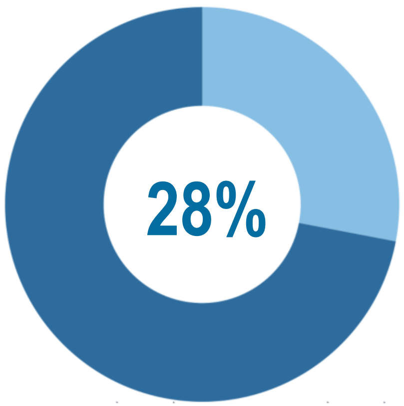
Takeaway 3

The front door of care has moved… and health systems no longer own it.

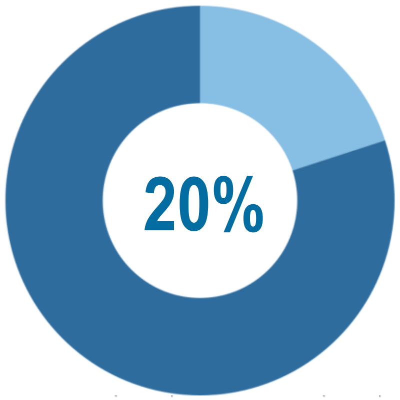
The fragmenting front door of healthcare.

The process of finding and choosing care has become far more decentralized, and far more decisive, than it once was.

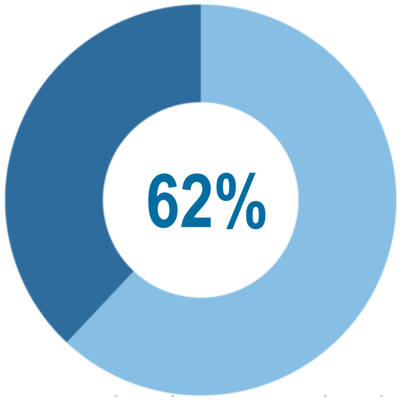
While healthcare professionals remain the most trusted source of medical advice — 63% of Gen Z say they trust doctors most — digital tools are increasingly shaping how patients interpret information before those interactions occur.



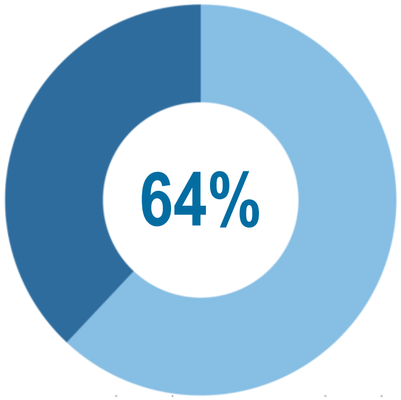
More than 28% of adults ages 26–34 say they always or often use it



1/5 Gen Z respondents report using AI tools to research healthcare providers

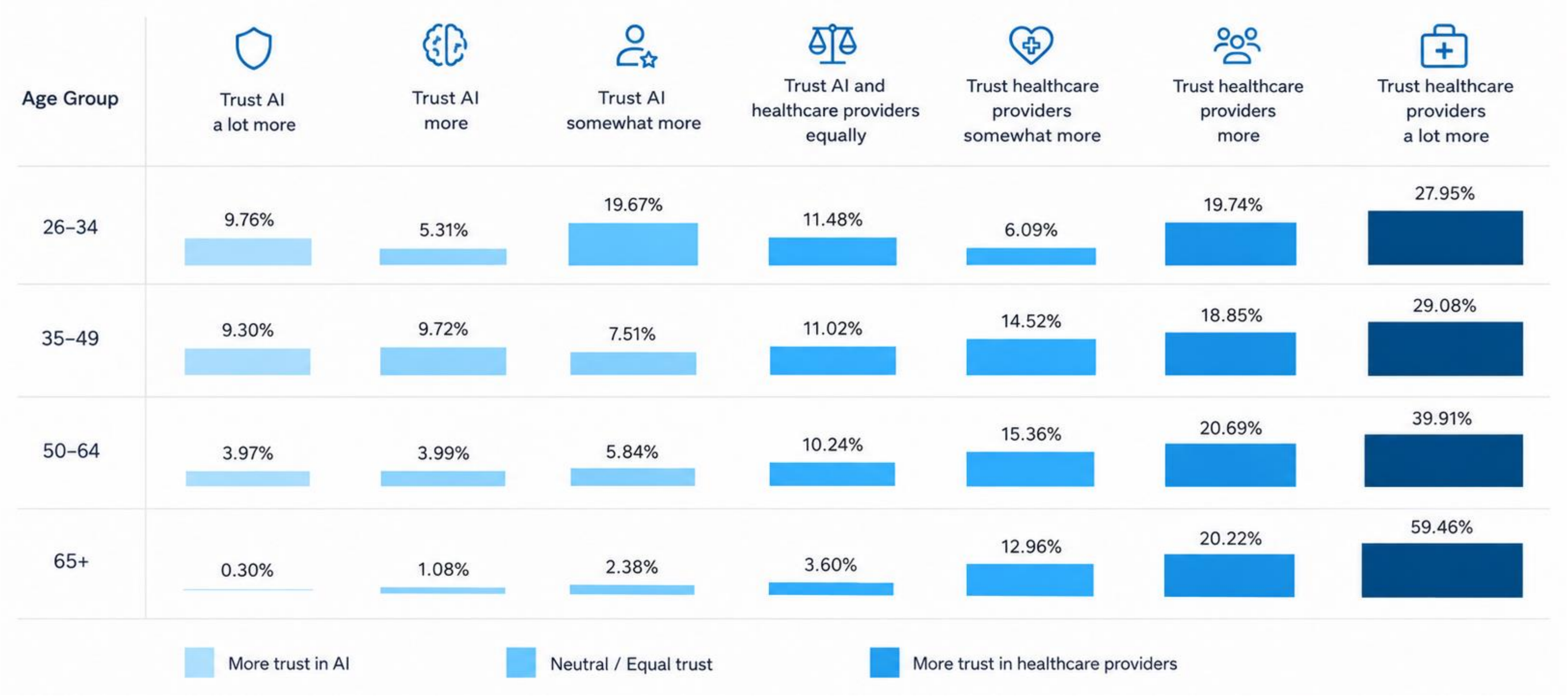


Say they never or rarely use AI for medical

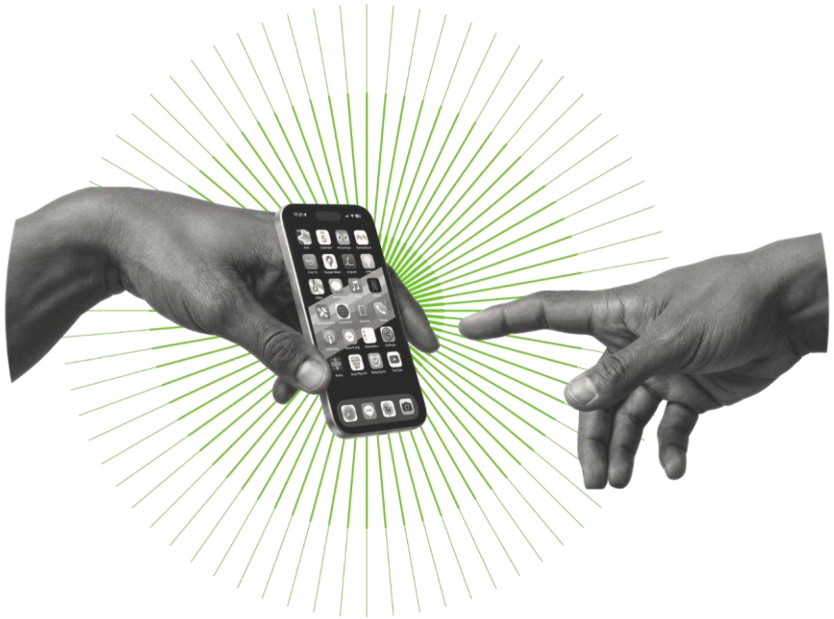


Among those that use AI for healthcare questions, 64% have delayed or foregone care

How much do you trust healthcare advice **from ChatGPT or AI tools compared to healthcare providers like doctors?**



Percentages may not total 100% due to rounding.
Source: Original data   Base: 1,000; 26-34: 142, 35-49: 320, 50-64: 293, 65+: 245



The fragmenting front door of healthcare.

Increasing trust in medical advice from AI tools compared to doctors among younger people is a major warning sign about the front door of care.

Over 46% of respondents in the 26-34 age range reported trusting healthcare advice from AI as much as or more than advice from healthcare providers, and a visit to ChatGPT has no access barriers and lower costs.

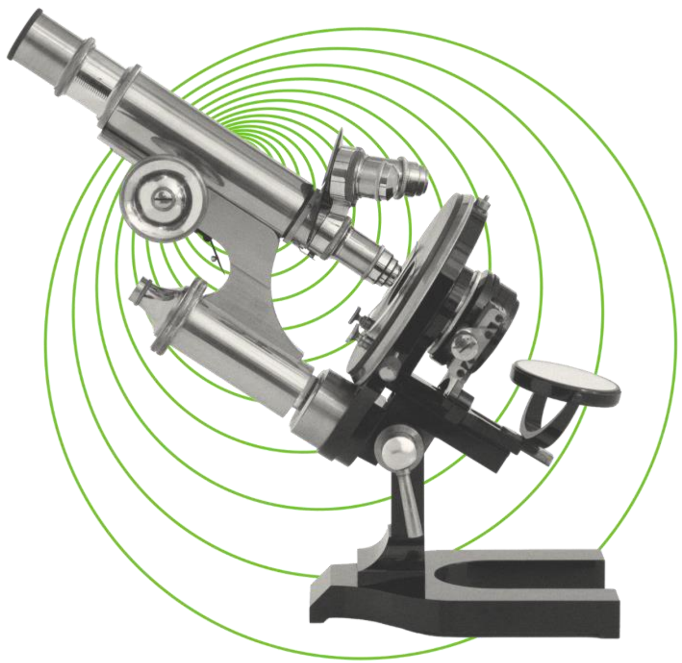
What it means for health systems:

By the time a patient decides to seek care, they may have already decided for themselves what's wrong, what care they need, and where they're going.

Health systems will have to fight to own the patient relationship or accept a narrower role.

Questions to bring back to your team:

- When a prospective patient in your market asks AI where to go for care, does your system show up?
- Are you building a holistic strategy to be present in AI-driven discovery (e.g., platform partnerships, AI Agents, etc.)
- Do you have the capital, tech investment, and operational resources to truly own the patient relationship?
- How you acquire patients at the exact moments when patients need care?



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Takeaway 4

How you show up shapes whether patients choose you.

Consumers are open to hearing from health systems, and they want to hear more, not less.

There's a common assumption that consumers are overwhelmed by healthcare messaging.
But the data tells a different story.

49.7%

Of respondents report seeing healthcare marketing weekly or more often.

76.7%

Say the amount of marketing they see is "about right."

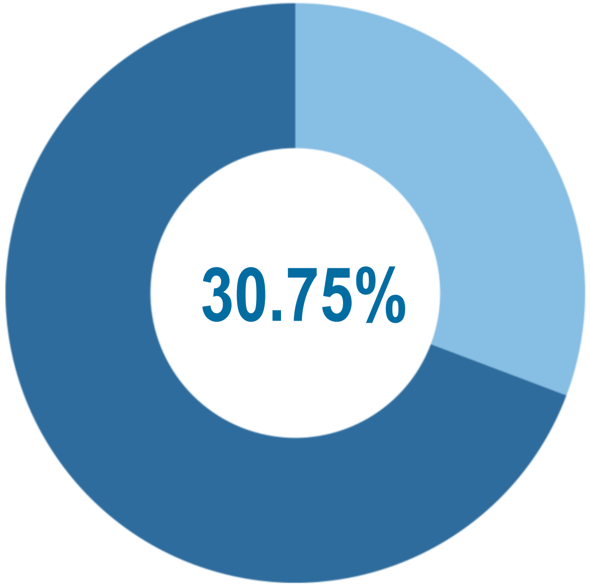
17.3%

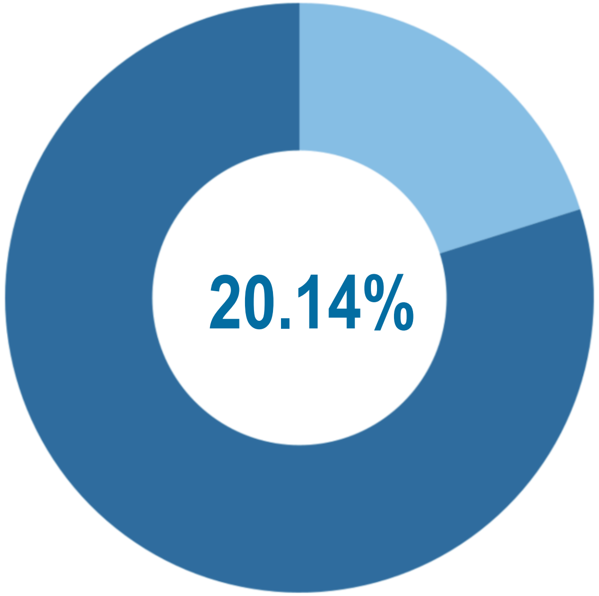
Say they see too much healthcare marketing.

People who report seeing healthcare messaging more frequently are also more likely to take action.

Based on the studies, the common actions following healthcare marketing include:

Visited a health system website.





Sought additional information.

When action does occur, it tends to involve **information-seeking behaviors** rather than immediate care utilization.

Trust is highly correlated with choice, and trust is built, in large part, on personal experiences

Because personal experiences contribute so much to impressions, getting people in the door is key to hospital choice.

Advertising and marketing can be a foot in the door.

52%

Of system trust is attributed to personal experiences or the experiences of people respondents know

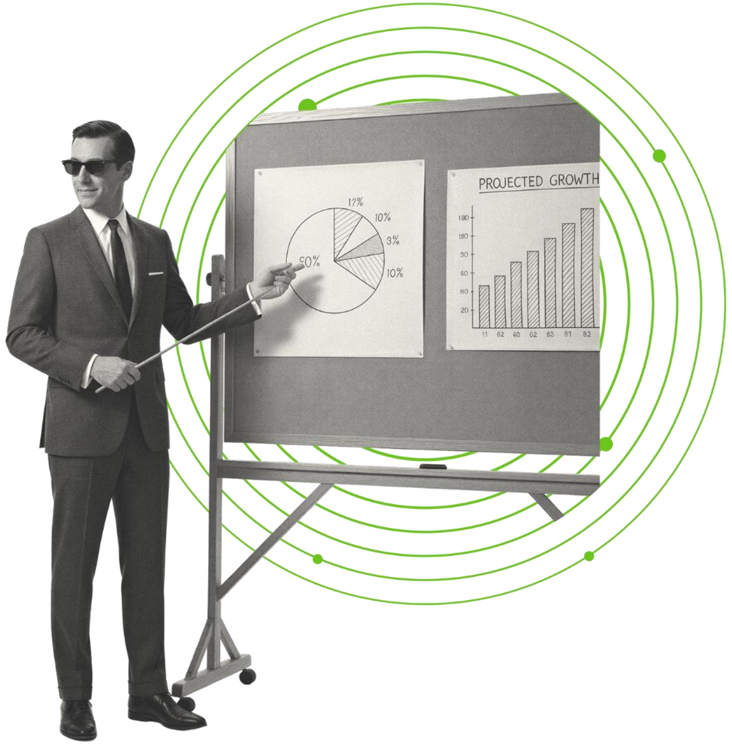
What it means for health systems:

In an environment where patients are navigating independently, ensuring that your health system shows up consistently to build mental availability is how your build familiarity that breeds trust.

The health systems that show up **before** patients need them are the ones patients choose.

Questions to bring back to your team:

- Is your community aware of the full scope of what you offer?
- Are you building trust with your community consistently, or only when you need to fill a service line?
- When a patient has a health question at 10pm, is your system present in that moment, or have you ceded it entirely to Google and ChatGPT?



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Takeaway 5

Younger generations don't trust the healthcare system.

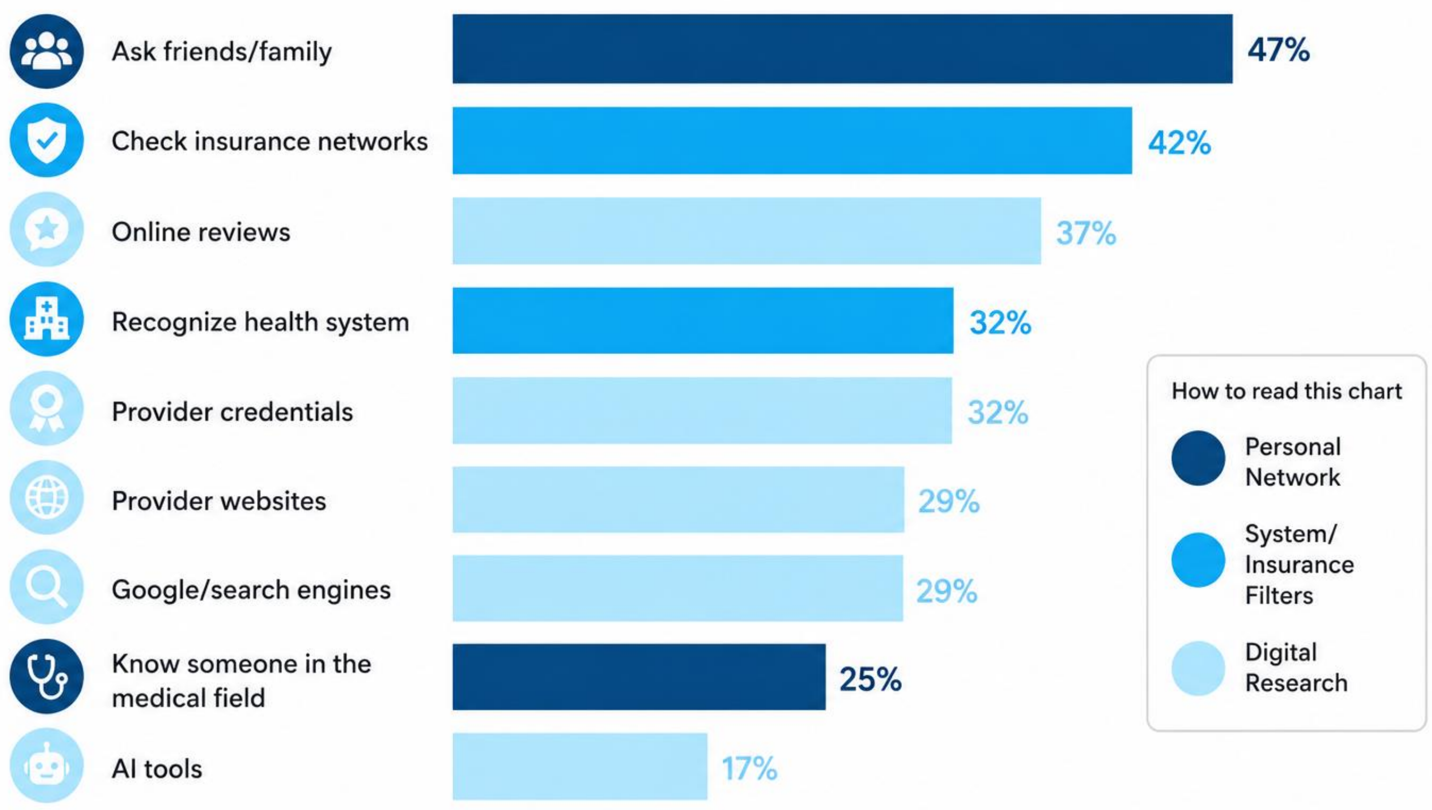
Behavior from younger generations signals a different future.

The shifts reshaping healthcare...

- self-navigation
- digital-first behavior
- fragmented entry points

...are not evenly distributed.

How Gen Z Finds Healthcare Providers

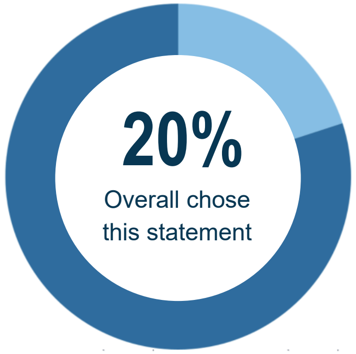


Gen Z's attitudes diverge in some distinct ways.

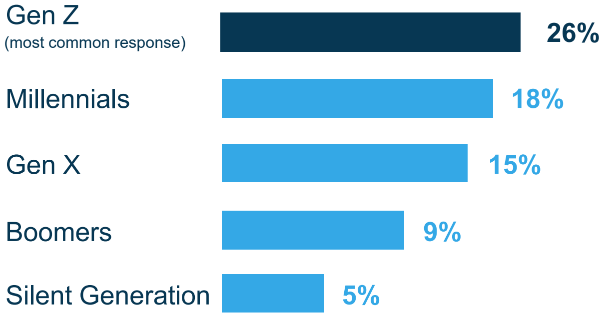
Which of the following statements best describes ***how you feel*** about the American healthcare system?

1 **The American healthcare system is corrupt and designed to benefit a small group of wealthy people.**

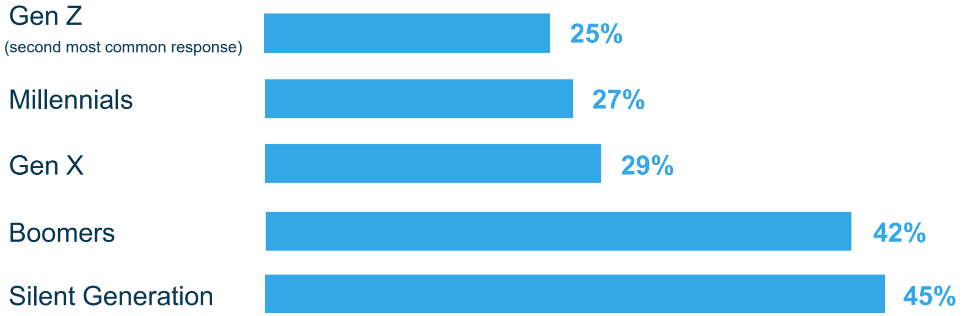
2 **The American healthcare system could be better, but it's better than other similar countries.**



% Who Chose This Statement



% Who Chose This Statement (most common for older generations)



Key Takeaway

Gen Z is the only generation where the belief that the system is "corrupt and designed to benefit a small group of wealthy people" is the most common response. The second most common option for Millennials (22%), Gen X (26%) and Boomers (23%) was **"The American healthcare system is broken and needs to be replaced with a different system."** This choice was the third most common for Gen Z (9%) and the Silent Generation (13%).

Base: 2,000. 1,000 Gen Z, 361 Millennial, 267 Gen X, 343 Boomer, 29 Silent Generation (sparse)

But behavior and preferences are fairly common among adults under retirement age.

Millennials and Gen X often aligned more with Gen Z than Boomer or Silent Generation respondents.

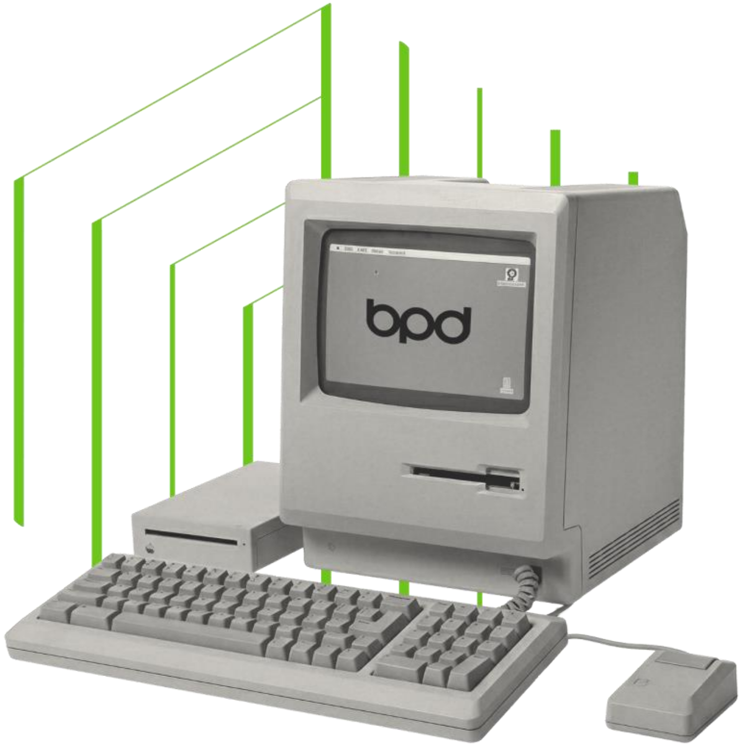
How would you like AI to be incorporated into your medical care?

Survey Statements	Gen Z	Millennial	Gen X	Boomer	Silent Generation
I do not want my doctor to consult AI at all.	45.00%	29.89%	33.93%	53.34%	60.91%
I want my doctor to consult AI, but to rely on their own knowledge for diagnosis and treatment.	16.24%	22.19%	25.05%	22.54%	10.41%
I want AI to be incorporated to some degree, but I am not sure how or how much.	16.31%	15.43%	22.58%	12.9%	14.58%
I want my doctor to confirm their diagnosis and treatment is correct with AI	11.76%	18.60%	11.29%	7.51%	8.22%
I want my doctor to put more stock into AI diagnosis and treatment advice than their own medical knowledge.	9.65%	13.50%	6.81%	2.76%	0.00%
Other	1.04%	0.38%	0.34%	0.91%	5.87%

% Agree (Color Key)

- 0%
- 0-10%
- 10-20%
- 20-30%
- 30%+

Base: 2,000. 1,000 Gen Z, 361 Millennial, 267 Gen X, 343 Boomer, 29 Silent Generation (sparse)



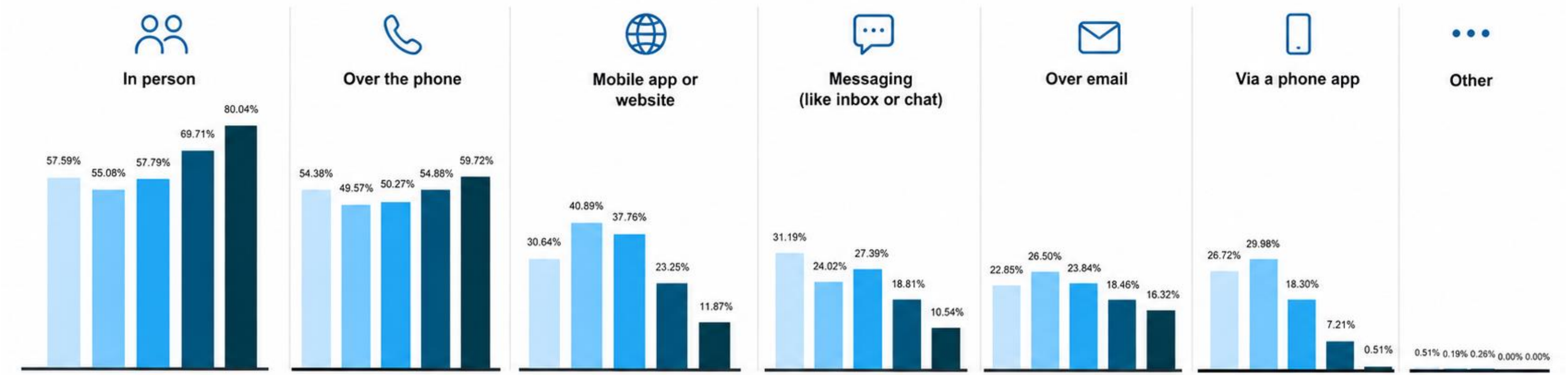
Younger generations are indicating digital expectations.

Younger generations want more varied modes of communication.

Generations that are more comfortable with technology are indicating more readiness to step further into some of these communication modes.

How do you prefer to communicate with your healthcare provider?

Choose all that apply.



	In person	Over the phone	Mobile app or website	Messaging (like inbox or chat)	Over email	Via a phone app	Other
Gen Z	57.59%	54.38%	30.64%	31.19%	22.85%	26.72%	0.51%
Millennial	55.08%	49.57%	40.89%	24.02%	26.50%	29.98%	0.19%
Gen X	57.79%	50.27%	37.76%	27.39%	23.84%	18.30%	0.26%
Boomer	69.71%	54.88%	23.25%	18.81%	18.46%	7.21%	0.00%
Silent Generation	80.04%	59.72%	11.87%	10.54%	16.32%	0.51%	0.00%

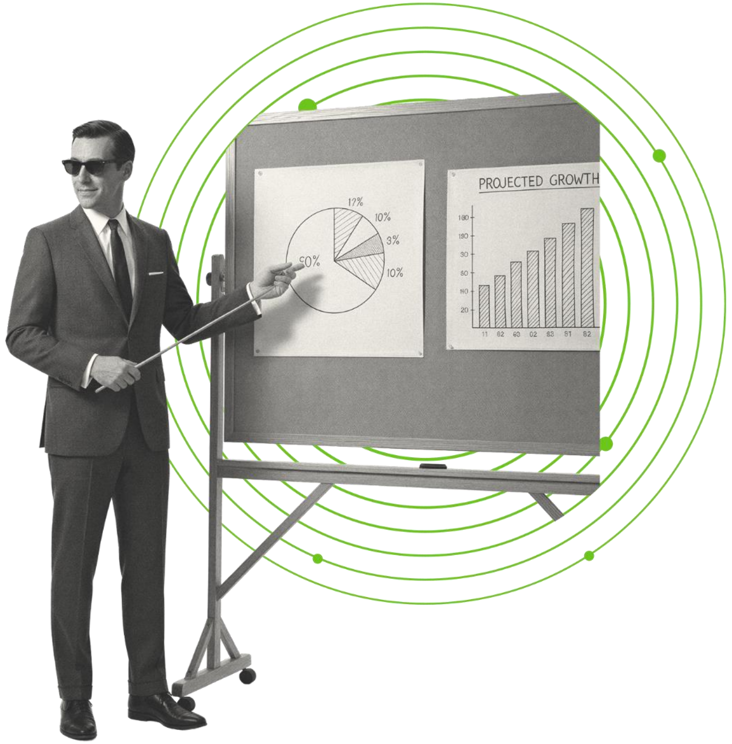
Base: 2,000. 1,000 Gen Z, 361 Millennial, 267 Gen X, 343 Boomer, 29 Silent Generation (sparse)

What it means for health systems:

Gen Z is entering the system with a fundamentally different view of it.

And they're already in your workforce. The same skepticism shapes how they experience you as an employer.

Institutional trust may not transfer to the next generation of patients and HCPs.



Questions to bring back to your team:

- What does your brand mean to someone under 30 in your market (patients and workforce)?
- If 26% of the next generation believes the system is designed against them, what would it take to earn their trust?
- Are you giving younger employees a reason to believe in your leadership vision?

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Three Key Take-Aways

- **Patients are making tradeoffs earlier.** Cost, access and convenience increasingly determine whether, where and how people seek care, often before a health system ever sees the demand.
- **The healthcare journey starts before the appointment.** Search, AI, marketing and other digital touchpoints are shaping what patients believe, what they think they need and which providers make the consideration set.
- **Winning the next generation requires earning relevance and trust differently.** Younger consumers are more digitally oriented, more skeptical of institutions and more willing to navigate care on their own, signaling where expectations are headed.

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Questions?

- Please be sure to complete the session evaluation on the mobile app!

Scan the QR code to download the full report

AHA Events

Emily Baker

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Emily Baker is VP of Innovation at BPD Health, advancing AI-powered strategies to unlock new engagement capabilities and elevate the impact of marketing teams. With more than a decade of experience leading content and social transformation, she drives innovation at the intersection of storytelling, technology, and audience engagement. A former healthcare business reporter, Emily applies an investigative lens to surface hidden connections, strategic insights, and the narratives that move organizations forward.

Mallory Roman

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Mallory Roman is Director, Research and Marketing Science at BPD, bringing over 18 years of experience designing and conducting behavioral research. Her academic training focused on consumer persuasion, goals and motivation, and nonconscious influence, which she has applied to academic, civic engagement, and consumer research contexts. At BPD, she uses a variety of quantitative and qualitative research methods to help clients leverage consumer insights in crafting their brand, communications, and creative strategy. Mallory is a graduate of Duke University, where she received her PhD in social psychology.