
PwC's 2024 Healthcare Consumer Survey: Insights to Navigate the Future



The healthcare landscape in the United States is undergoing a profound transformation. Driven by technological advancements and evolving patient expectations, healthcare providers and consumers face many challenges and opportunities. PwC's 2024 US Healthcare Consumer Insights and Engagement Survey highlights the main trends in affordability, digital adoption, and consumer engagement. The following analysis will explore the survey's main findings, examining how healthcare stakeholders can address these concerns and foster a more accessible, consumer-friendly system.

Affordability: A Persistent Challenge

One of the survey's most striking findings is the ongoing healthcare affordability issue. A staggering 28% of consumers reported delaying or skipping care due to financial constraints, with younger generations, such as Gen Z and millennials, experiencing even greater difficulty. This highlights a pressing need for healthcare providers and insurers to develop strategies that make healthcare more affordable and transparent.

The current system leaves many consumers uncertain about the costs of tests, procedures, and medication. Improving transparency and helping consumers navigate the financial aspect of their healthcare is vital. Initiatives like patient assistance programmes and price comparison tools could ease the burden, allowing patients to access necessary care without the fear of overwhelming costs. As healthcare costs continue to rise, addressing affordability is critical to improving overall health outcomes across all demographics.

Preventive Care: Shifting Consumer Attitudes

Despite years of effort to encourage preventive care, the survey reveals that 65% of consumers still wait until their health issue becomes urgent before seeking care. This behaviour leads to higher healthcare costs in the long run, as addressing health issues earlier could prevent more serious complications. The trend is more prevalent among younger consumers, with Gen Z and millennials more likely to delay care than older generations, such as baby boomers.

This presents an opportunity for healthcare providers to engage patients through education and outreach. Targeted campaigns promoting preventive care and offering incentives for early interventions could shift these attitudes. By proactively engaging consumers in their health management, the industry can help reduce the strain on healthcare resources while improving patient outcomes. Encouraging consumers to prioritise wellness over reactive care is essential for creating a healthier society.

Digital Adoption: A Generational Divide

The survey indicates a growing acceptance of digital tools in healthcare, particularly among younger generations. An overwhelming 80% of consumers aged 18-34 expressed willingness to use generative artificial intelligence (GenAI) for routine healthcare tasks like scheduling appointments and refilling prescriptions. However, this enthusiasm diminishes with older generations, where less than 60% of those over 55 show the same level of comfort with these tools.

The shift towards digital solutions, including telehealth and AI-powered platforms, presents a double-edged sword. While it offers the potential for more efficient and accessible care, it also underscores a generational divide in trust and familiarity with technology. The challenge for healthcare providers lies in delivering a seamless, human-centred experience that bridges this gap. Healthcare providers can build trust and encourage wider adoption of digital tools by focusing on transparency, data privacy, and personalised communication. In doing so, they will be better positioned to meet the needs of tech-savvy younger consumers while ensuring that older generations do not feel alienated or left behind.

The insights from PwC's 2024 US Healthcare Consumer Survey demonstrate that there is no one-size-fits-all approach to healthcare. Factors such as age, health status, and financial capability shape consumers' needs and preferences. Addressing these nuanced differences requires healthcare providers, insurers, and pharmaceutical companies to rethink how they deliver care. Making healthcare more affordable, promoting preventive care, and embracing digital innovation will be critical in creating a system that works for all consumers.

The healthcare industry must respond to these consumer insights with urgency and empathy. By listening to consumers' concerns and adapting to their needs, healthcare stakeholders can foster a future where care is not only accessible but also more personalised, efficient, and patient-centred. The future of healthcare hinges on this adaptability, and the time to act is now.

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