DATA OVERVIEW REPORT

Data Overview: Customer Experience With Healthcare Providers, Q1 2026

Ease Of Access And Holistic Care Are Sticking Points For Engagement

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Summary

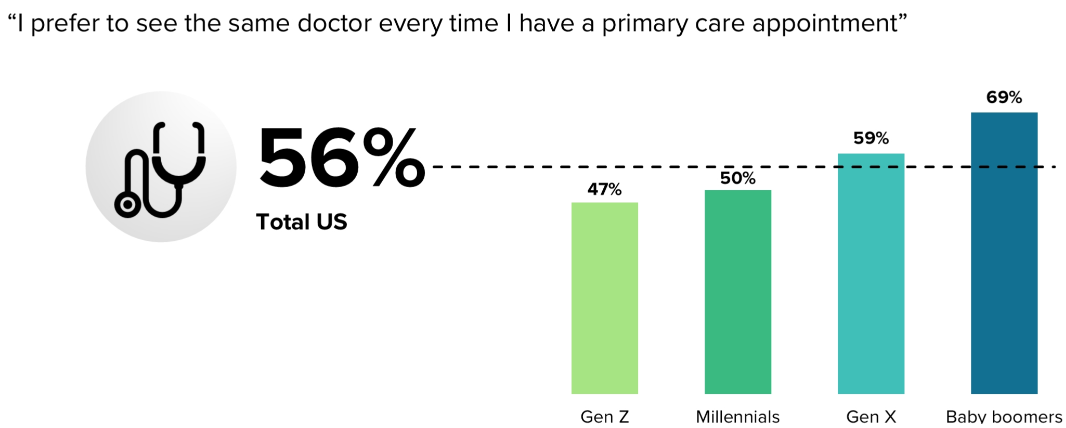
US healthcare consumers increasingly prioritize convenience over continuity with the same provider, as retail clinics gain traction for their accessibility and flexible hours. Patients are also relying on providers for guidance beyond clinical care, such as managing insurance and scheduling, as they navigate the myriad challenges that they encounter when interacting with the healthcare system. Health disparities further undermine engagement, with those in poor physical or mental health feeling least supported. These trends signal a shift toward ease of access, holistic support, and trust-building as critical factors in patient experience.

Consumers Are Indifferent To Provider Continuity

Consumers are redefining what matters most in their healthcare journey. With so many options for receiving care, and rising expectations for seamless, always-on digital experiences, patients increasingly prioritize convenience and flexibility over continuity with a single provider. According to Forrester's Healthcare Topic Insights 1 Survey, 2025, just over half of US online adults (56%) prefer to see the same doctor every time they have a primary care appointment, signaling mild interest in, rather than strong desire for, provider continuity. Interestingly, this preference declines among younger generations, which tend to be even more flexible about provider choice (see Figure 1). This trend stands out, given that two-thirds of US online adults take at least one prescription medication daily — an indicator of ongoing health needs that would typically benefit from consistent provider relationships (see Figure 2). The disconnect suggests that while many patients value familiarity, generational attitudes and system constraints may be reshaping expectations around continuity in care.

Figure 1

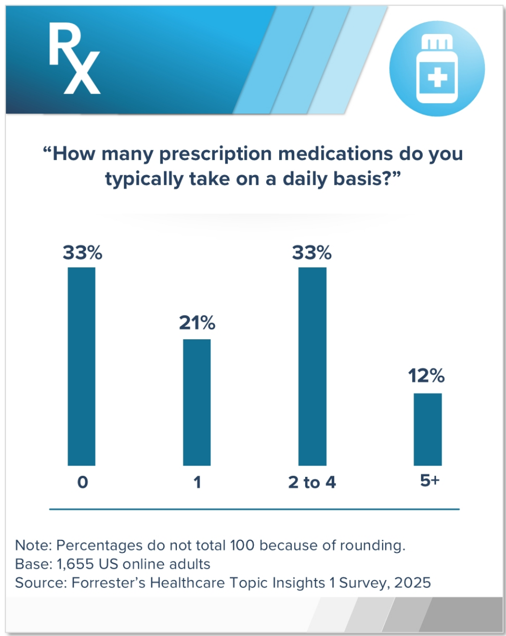
Healthcare Consumers Show Mild Interest In Provider Continuity



Base: 407 to 1,655 US online adults; base sizes vary by generation
Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

Figure 2

Two-Thirds Of US Adults Take At Least One Prescription Medication Daily



Ease Of Access Is Outpacing Provider Consistency

At least half of consumers are comfortable receiving various types of care at retail health clinics, reflecting growing openness to nontraditional care settings (see Figure 3). This trend highlights the appeal of convenience — locations inside drugstores or supermarkets, extended hours, and shorter wait times — while also suggesting that continuity with the same provider may be less of a priority for some patients. Retail health clinics with easy access position themselves as a practical option for nonemergency needs, reshaping expectations around where and how care is delivered.

Figure 3

Retail Clinics Have An Opportunity To Expand Nonemergent Care Offerings

"Please indicate your level of comfort using retail health clinics for each of the following types of care"
(4 or 5 on a scale of 1 [not at all comfortable] to 5 [very comfortable])

67%	65%	60%	50%
Primary physical care	Urgent care	Specialty physical care	Mental care

Base: 856 US online adults who have received in-person care at a retail health clinic
Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

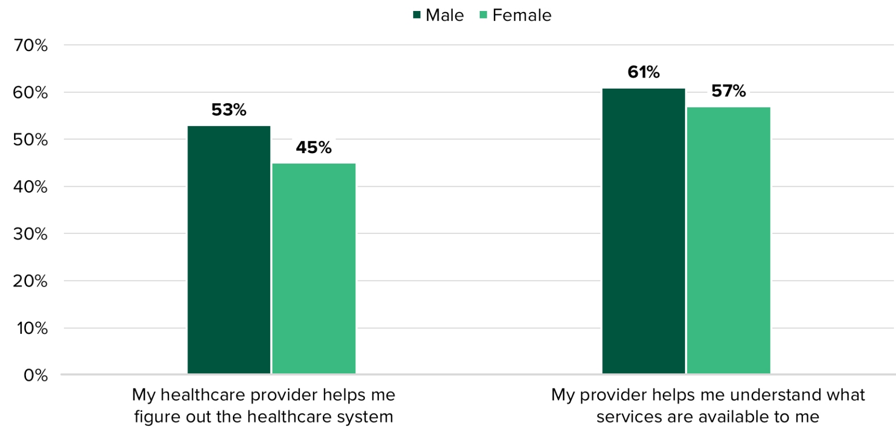
Consumers Rely On Providers For More Than Just Clinical Care

As healthcare becomes more complex and recent volatility contributes to confusion around access and delivery vulnerability, consumer expectations of their provider have evolved. Providers routinely assist consumers in navigating the overall complexity of healthcare outside of direct clinical care — insurance, referrals, billing, scheduling, and understanding how different parts of the healthcare system work together. Nearly half of US online adults rely on their provider to help them figure out the healthcare system, and 59% indicate that their provider helps them understand what services are available. Notably, men are more likely than women to say their provider supports them for big-picture and individual guidance (see Figure 4).

Figure 4

Men Feel More Supported Than Women In Understanding The Healthcare System

"Please indicate how strongly you agree or disagree with the following statements about your healthcare/healthcare provider"
(4 or 5 on a scale of 1 [strongly disagree] to 5 [strongly agree])



Note: Not all response options are shown.
Base: 803 (male) to 839 (female) US online adults
Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

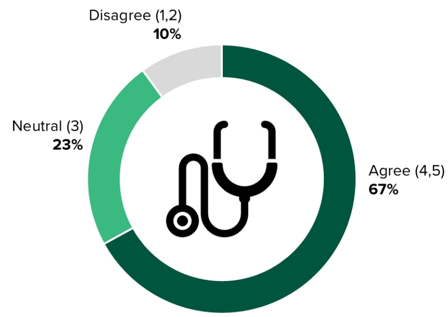
Trust In Physicians' Priorities Is Modest

Consumers rely on their doctors to provide preventive guidance, personalized treatment, ongoing health management, and care coordination. Long-term, supportive partnerships between consumers and providers enhance both health outcomes and cost efficiency. However, consumers' view of their physician and their physicians' priorities could impact the quality of the relationship. Sixty-seven percent of US online adults say they trust that their doctor prioritizes their health over profit. This leaves a third of consumers unsure of, or even doubting, their doctors' priorities (see Figure 5). US baby boomers (75%) most frequently indicated they trust that their doctors prioritize their health over profit, leaving an opportunity to improve trust among other generations (see Figure 6).

Figure 5

Consumer Perspectives On Doctor Priorities Could Impact The Patient-Provider Relationship

"I trust that my doctor prioritizes my health over profit"
(Scale is 1 [strongly disagree] to 5 [strongly agree])

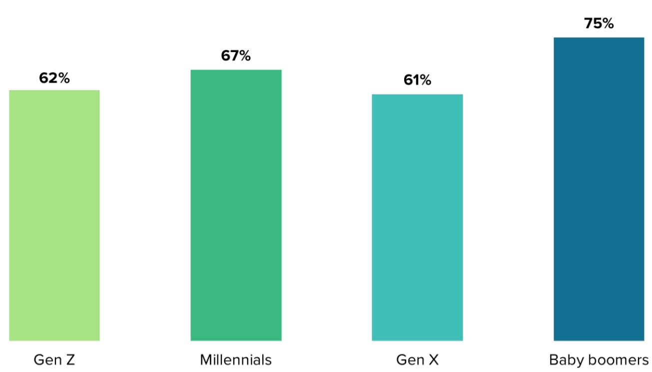


Base: 1,655 US online adults
Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

Figure 6

Baby Boomers Have More Trust In Doctor Priorities Than Other Generations

"How strongly do you agree that your doctor prioritizes your health over profit?"
(4 or 5 on a scale of 1 [strongly disagree] to 5 [strongly agree])



Base: 373 to 456 US online adults; base sizes vary by generation
Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

Basic Touchpoints Remain A Missed Opportunity

Consumers' challenges contacting their healthcare provider's office haven't changed or improved. US online adults who have contacted their provider's office consistently report that their top three challenges year over year are waiting to speak with someone on the phone, waiting for a callback, and providing the same information to multiple people (see Figure 7). However, Gen Z experienced more challenges than any other generation. According to our 2025 data, only 21% did not run into any challenges when contacting the healthcare provider's office, and only 24% did not face challenges when scheduling an appointment (see Figure 8). The failure to execute basic touchpoints could result in increased patient frustration and higher risk of care abandonment as younger patients may give up on scheduling or miss appointments altogether (see Figure 9).

Figure 7

Contacting Healthcare Providers Hasn't Gotten Easier Over The Past Three Years

"What were the top three challenges that you faced when contacting the healthcare provider's office?"
(Please select up to three)

	2023	2024	2025
Wait to speak with someone on the phone	30%	31%	30%
Wait for a callback	25%	29%	27%
Provide the same information to multiple people	17%	14%	16%
Wait for a response via email or portal	14%	12%	14%
Person I spoke with could not answer my questions	14%	12%	13%
Couldn't get my questions answered or my needs addressed without having to talk with multiple people	12%	13%	12%

Note: Not all response options are shown.
Base: 1,521 to 3,774 US online adults who have contacted their healthcare provider's office; base sizes vary by year
Source: Forrester's Healthcare Topic Insights Surveys, 2023 to 2025

Figure 8

Gen Z Experiences The Most Hurdles Compared With Other Generations

"I did not run into any challenges when … "

	Gen Z	Millennials	Gen X	Baby boomers
Contacting the healthcare provider's office[1]	21%	35%	39%	**50%**
Scheduling an appointment with a healthcare provider[2]	24%	36%	38%	**53%**

Note: Not all response options are shown.
1. Base: 347 to 413 US online adults who have contacted their healthcare provider's office; base sizes vary by generation
2. Base: 340 to 409 US online adults who have scheduled an appointment with their healthcare provider; base sizes vary by generation

Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

Figure 9

Gen Z's Top Three Challenges When Contacting The Provider And Scheduling Appointments

Top Gen Z hurdles

Contacting provider's office[1]

1. I had to wait to speak with someone on the phone
2. I had to wait for a callback
3. I had to wait for a response via email or portal

Scheduling an appointment[2]

1. The first available appointment was too far out
2. There were no available appointments
3. It was difficult to get transportation to/from my appointment

1. Base: 347 US online adults
2. Base: 340 US online adults

Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

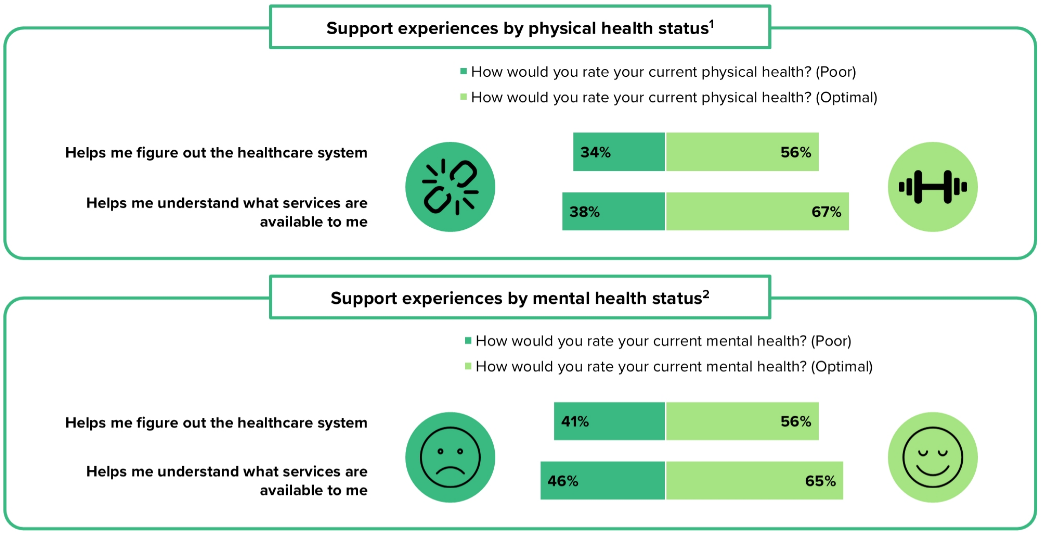
Health Status Disparities Undermine Patient Engagement

Consumers in poor physical and mental health often need the most guidance, yet they feel least supported. US online adults who self-reported their physical and mental health as poor are less likely to agree that their doctor helps them figure out the healthcare system and understand what services are available compared with those in optimal health (see Figure 10). These disparities can lead to delayed care, missed benefits, and worsening health outcomes. They undermine trust and engagement, which are critical for adherence and satisfaction. US online adults with optimal physical health agree they can easily access (71%), and know how to correct errors in (50%), their medical record (see Figure 11). Addressing this disconnect is an opportunity for providers to improve equity and self-advocacy, strengthen patient relationships, and deliver better overall care.

To meet evolving consumer expectations, healthcare provider organizations must prioritize ease of access, holistic support, and trust-building as core elements of the patient experience. Invest in convenient care options — such as extended hours, streamlined scheduling, and digital touchpoints — to reduce friction and improve accessibility. At the same time, strengthen trust and engagement by offering guidance beyond clinical care, addressing health disparities, and demonstrating transparency in priorities. These steps will position providers to deliver a more connected, consumer-centric experience that fosters loyalty and better outcomes.

Figure 10

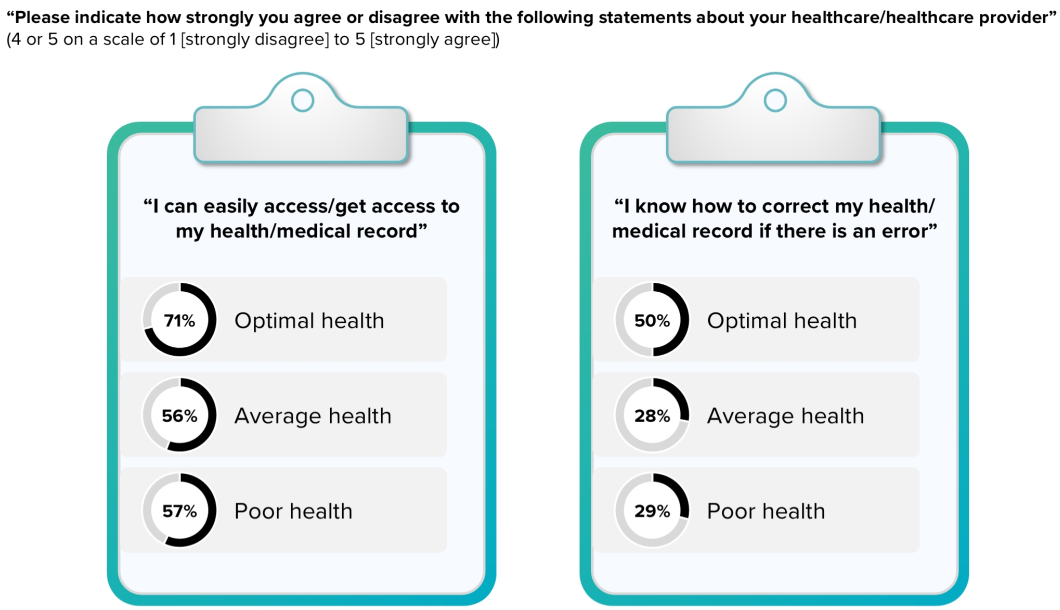
Consumers Reporting Poor Physical And Mental Health Feel Less Support



Note: Not all response options are shown.
1. Base: 165 to 983 US online adults; base sizes vary by current physical health
2. Base: 202 to 1,023 US online adults; base sizes vary by current mental health
Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

Figure 11

Consumers Reporting Optimal Health Can More Easily Access And Correct Medical Records



Base: 165 to 983 US online adults; base sizes vary by current physical health
Source: Forrester's Healthcare Topic Insights 1 Survey, 2025

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