

2025 HEALTHCARE MARKETING TRENDS

*A National Survey of
Healthcare Consumers*



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The landscape of healthcare provider selection has undergone a dramatic transformation over the past decade. As patients increasingly take control of their healthcare decisions, the traditional model of relying solely on physician referrals has evolved into a more consumer-driven approach. This shift has been accelerated by technological advancements, changing insurance models, and evolving patient preferences across different age groups.

Introduction

The Rise of Consumer-Directed Healthcare

The introduction of High-Deductible Health Plans (HDHPs) and Health Savings Accounts (HSAs) in the early 2000s marked the beginning of a significant shift toward consumer-directed healthcare. These changes, along with the transparency requirements of the Affordable Care Act, have empowered patients to make more informed decisions about their healthcare providers. Today, patients have unprecedented access to provider information, including pricing, quality metrics, and patient reviews.



Digital Tools and Provider Selection

The internet has become an invaluable resource for healthcare consumers, with different generations showing distinct patterns in how they research and select healthcare providers:

Baby Boomers *(Born 1946-1965)*

This demographic typically uses a combination of traditional methods and digital research, often starting with their insurance provider's website and complementing it with targeted searches for specific conditions or specialists. They place high value on provider credentials and hospital affiliations.

Generation X *(Born 1966-1980)*

This demographic frequently utilizes healthcare rating websites and insurance company tools to compare providers. They prioritize reading detailed patient reviews and researching provider backgrounds before making a decision.

Millennials *(Born 1981-1997)*

This demographic relies heavily on digital platforms, including social media, for healthcare decisions. They seek recommendations through platforms like Facebook groups, Reddit communities, and specialized healthcare forums. Convenience features like online scheduling and virtual visits are particularly appealing.

Generation Z *(Born 1998-2013)*

This demographic demonstrates the highest engagement with social media for healthcare decisions, often turning to platforms like TikTok and Instagram for provider information. They favor providers with an active online presence and digital communication options.

The Social Media Revolution in Healthcare Decision-Making

Social media has evolved beyond its original networking purpose to become a powerful tool for healthcare decision-making.

Patients use these platforms to:

Share experiences and seek recommendations within condition-specific support groups

Research providers through their social media presence and educational content

Connect with other patients who have similar conditions or have undergone similar procedures

Access crowd-sourced information about wait times, staff behavior, and facility conditions

Participate in online communities focused on specific health conditions or treatments

Survey Objectives

Our survey included 2,410 patients, representing a diverse sample of adults across the United States. Of the respondents, 51% identified as female, 48% as male, and 1% as other.

Generational Age Brackets

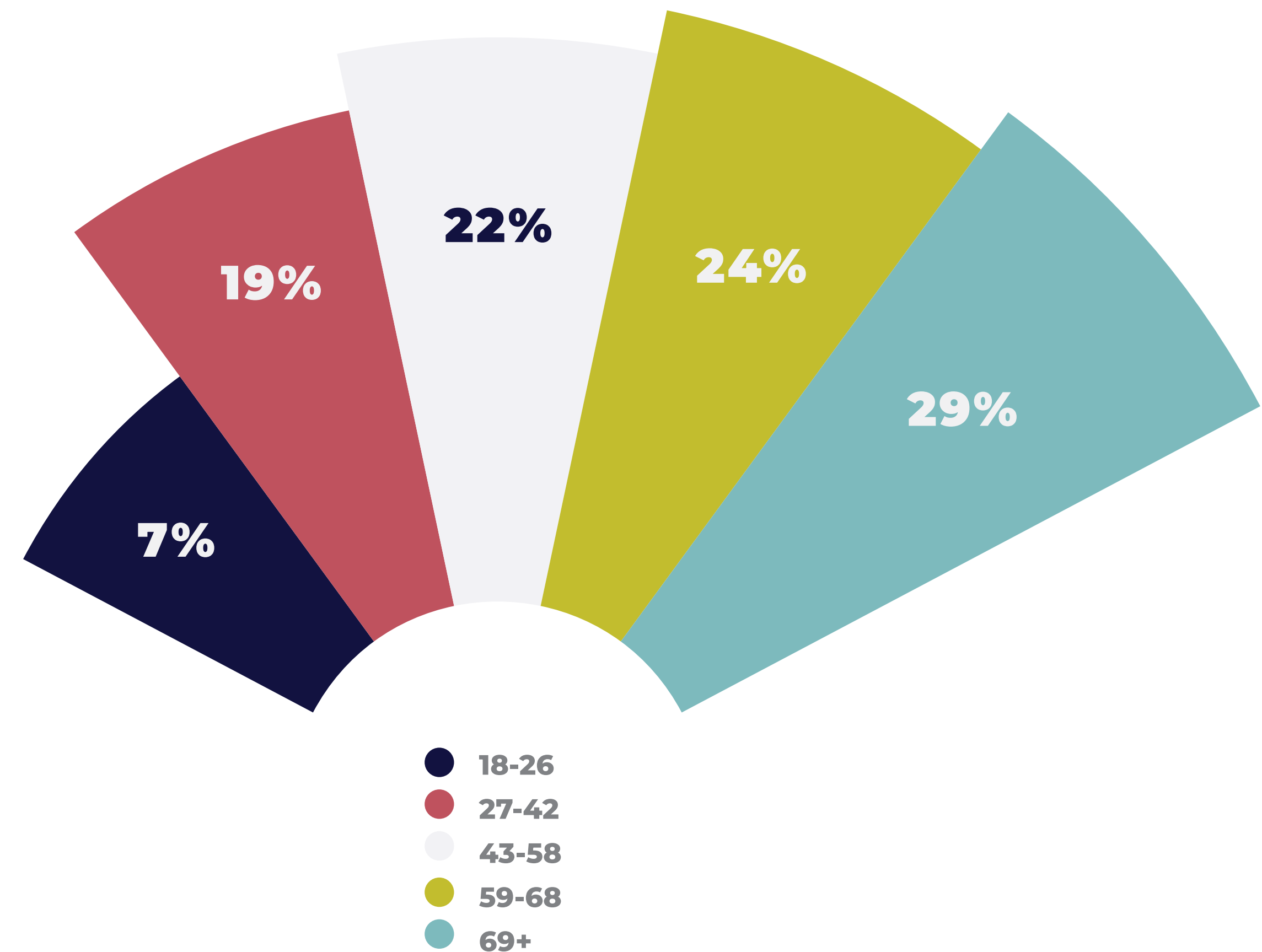
Gen Z (18-26): 8% of U.S. population

Millennials (27-42): 22% of U.S. population

Gen X (43-58): 20% of U.S. population

Boomers (59+): 29% of U.S. population

Respondents by Generation



Effective marketing in any industry hinges on aligning the right message with the right audience. In healthcare, this challenge is even more complex. Each generation not only consumes media—whether social, television, or advertising—differently but also has distinct healthcare needs.

To connect meaningfully, advertisers must craft strategies that align patient needs with tailored messaging and the most effective advertising channels.

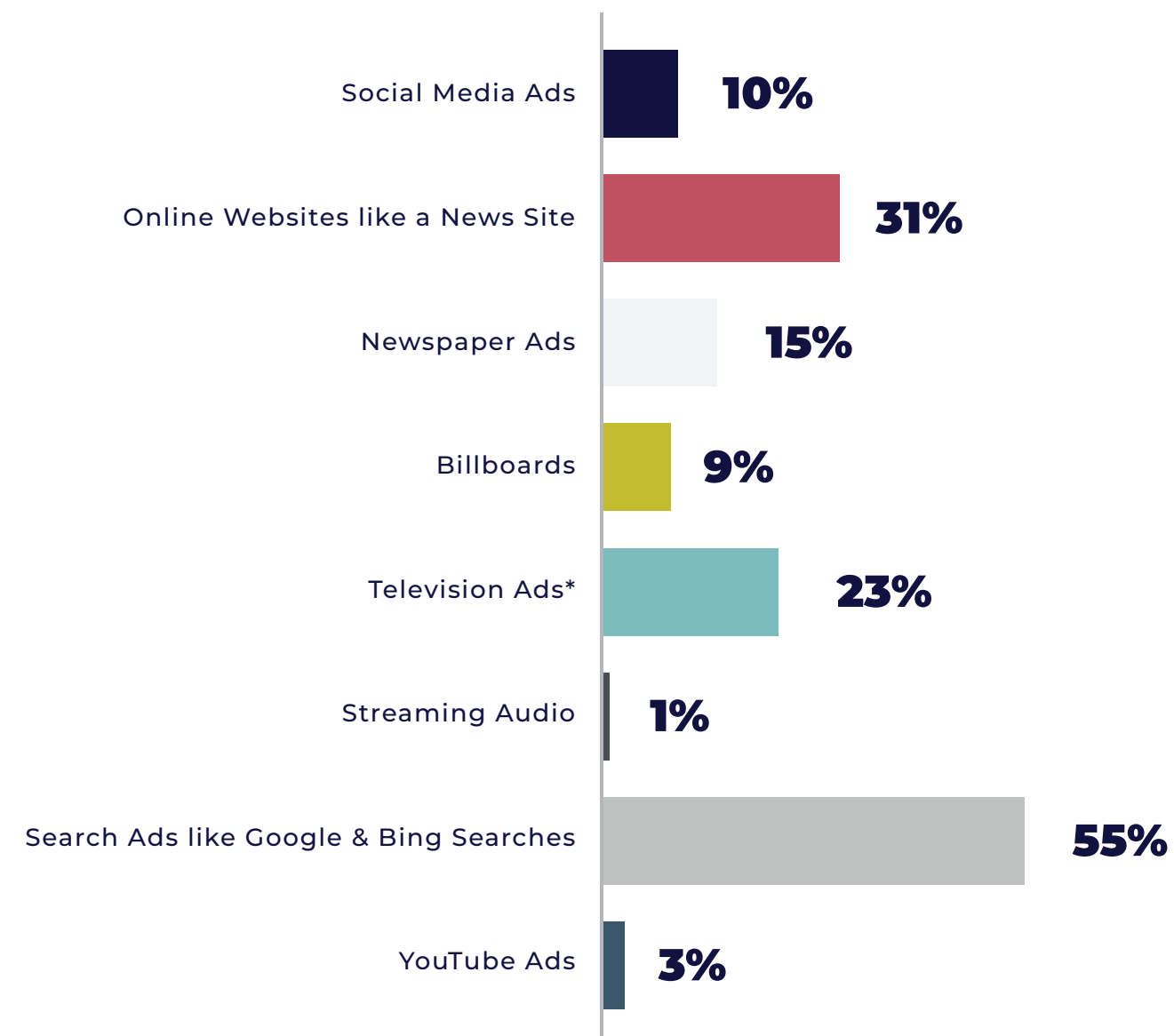
Healthcare Advertising

Where Patient's Notice Healthcare Advertising

While different generations share some channel preferences, capturing patients' attention amid the noise demands a strategic blend of advertising channels.

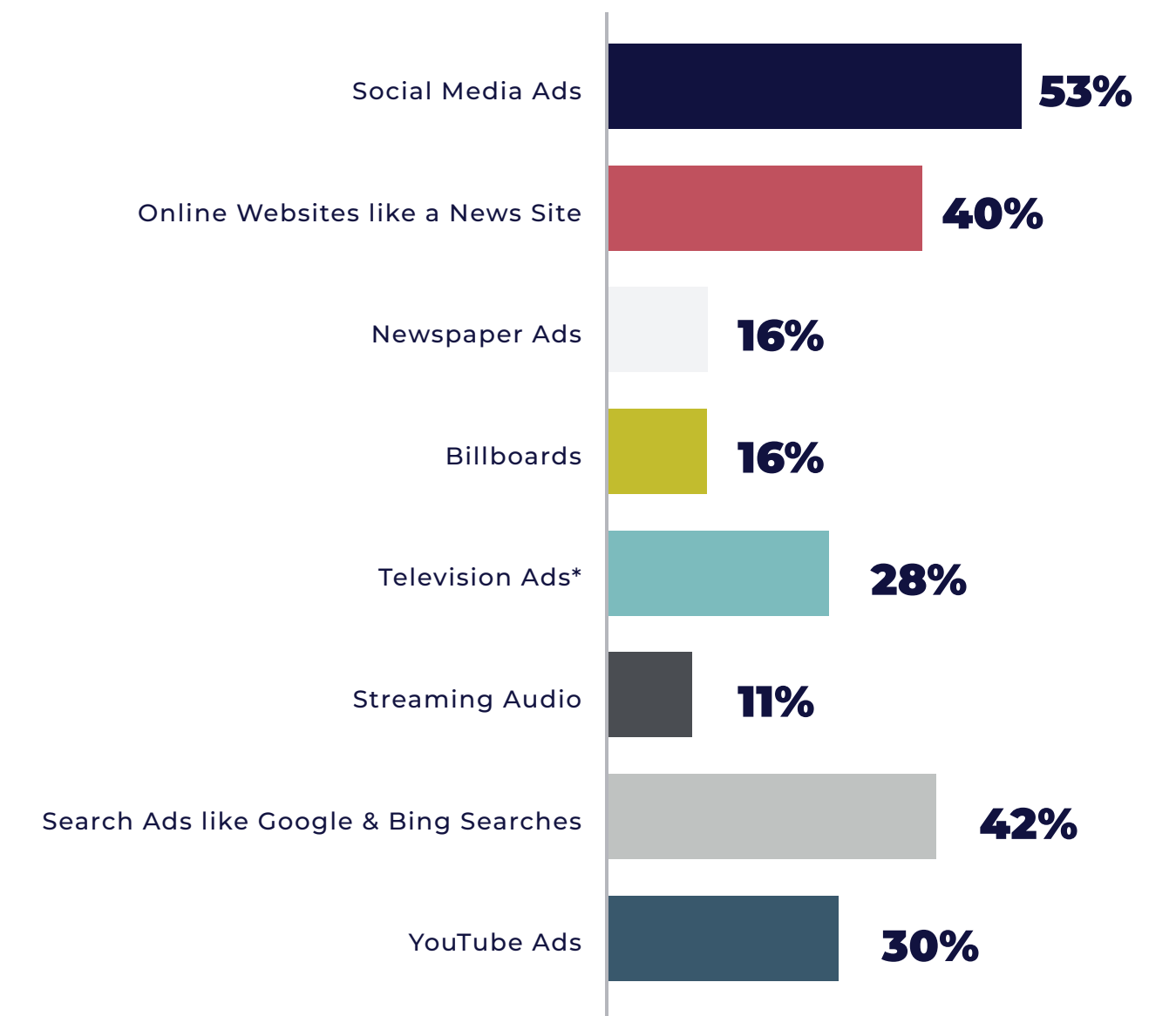
Where do you notice a practice's advertising?

Younger Boomers: Age 59-68



Where do you notice a practice's advertising?

Gen Z: Age 18-26

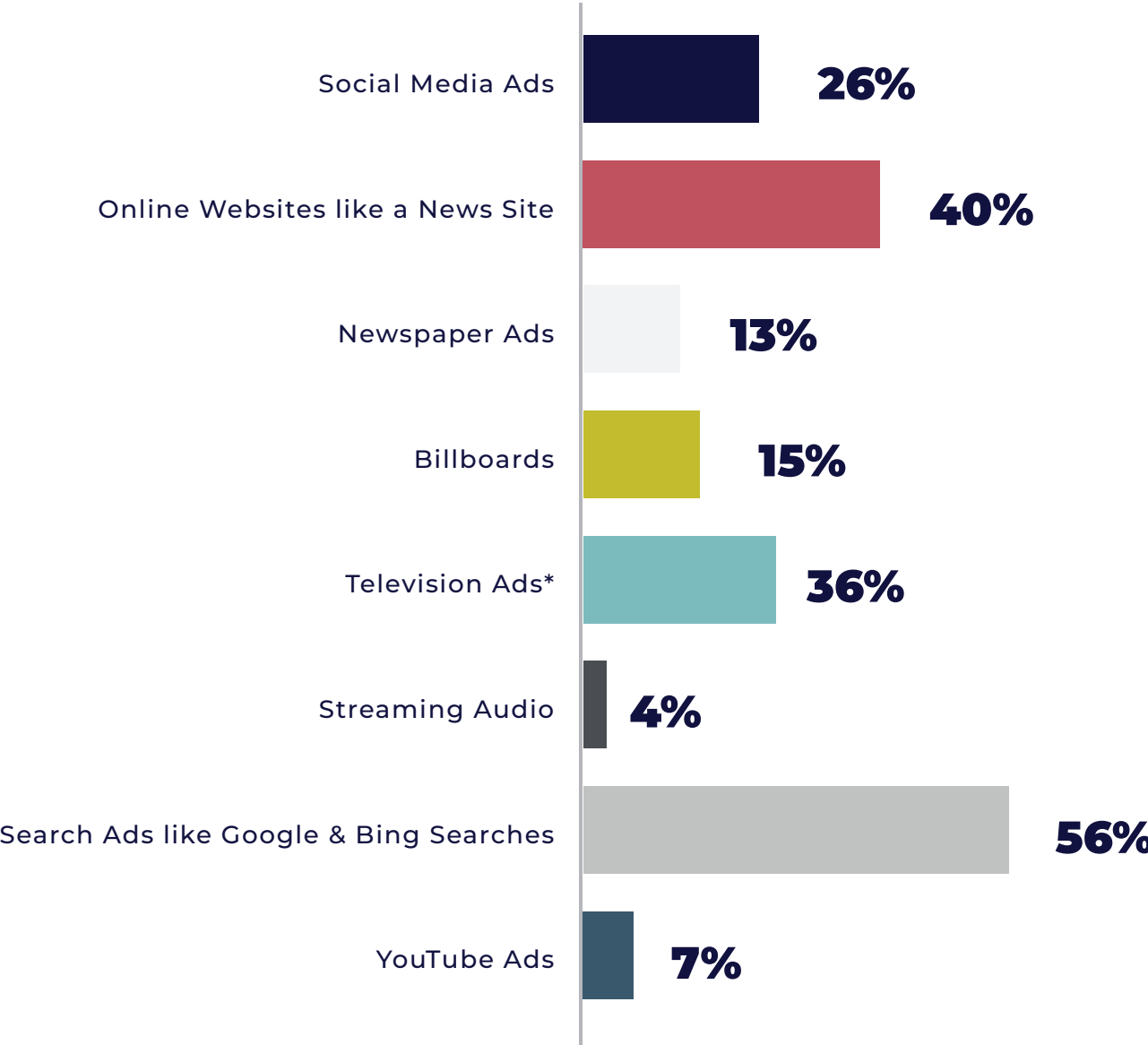


Social media plays a major role in the lives of Gen Z and Millennials and remains strong among Gen X. However, platform preferences vary by generation. Gen Z gravitates toward TikTok, Instagram, YouTube, and Snapchat, while Millennials, as they age, are shifting

more toward Facebook and moving away from Snapchat. Gen X primarily engages with Facebook and Instagram, while Boomers still use social media but less frequently—and they rarely notice or engage with healthcare advertising on these platforms.

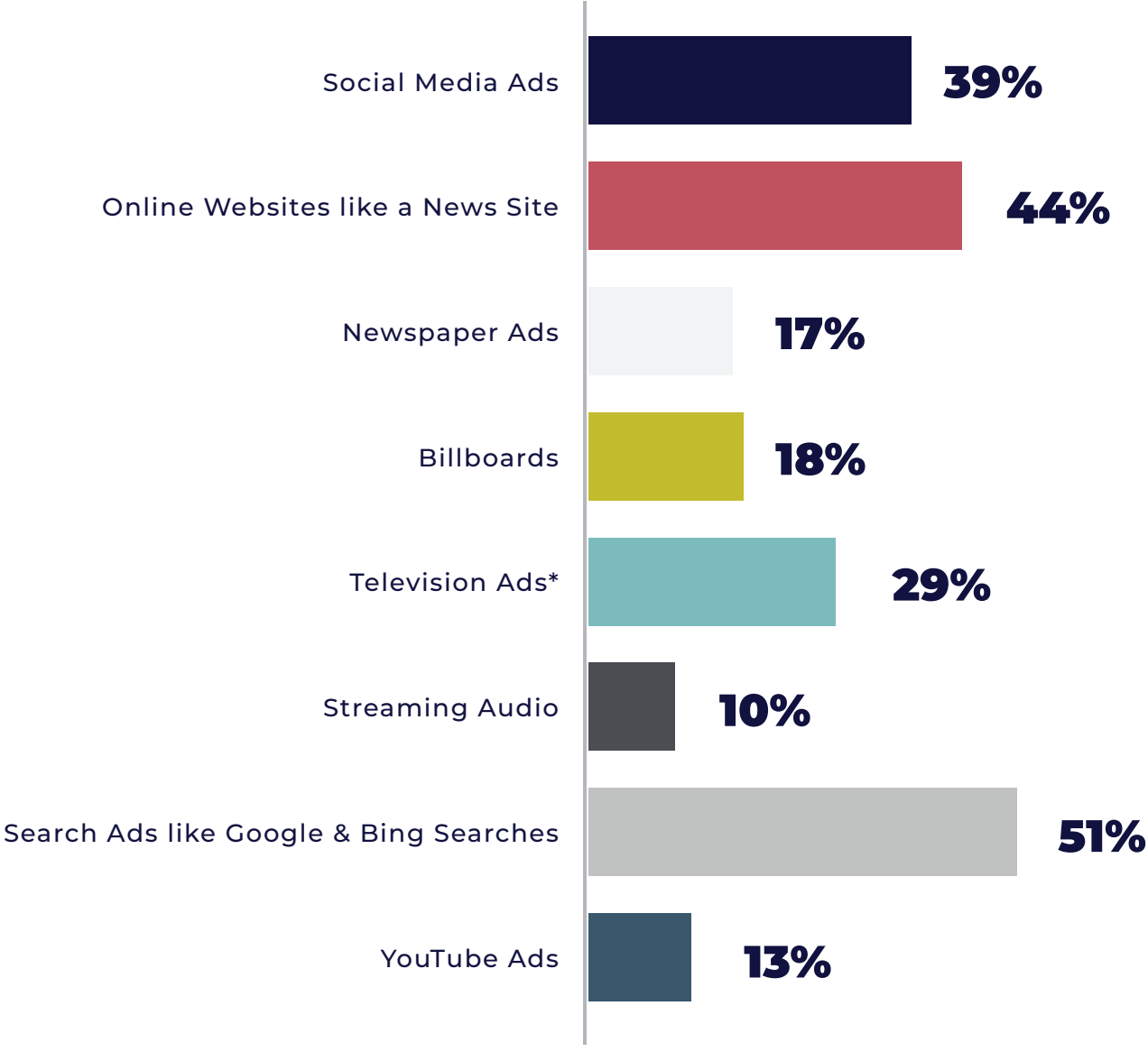
Where do you notice a practice's advertising?

Gen X: Age 43-58



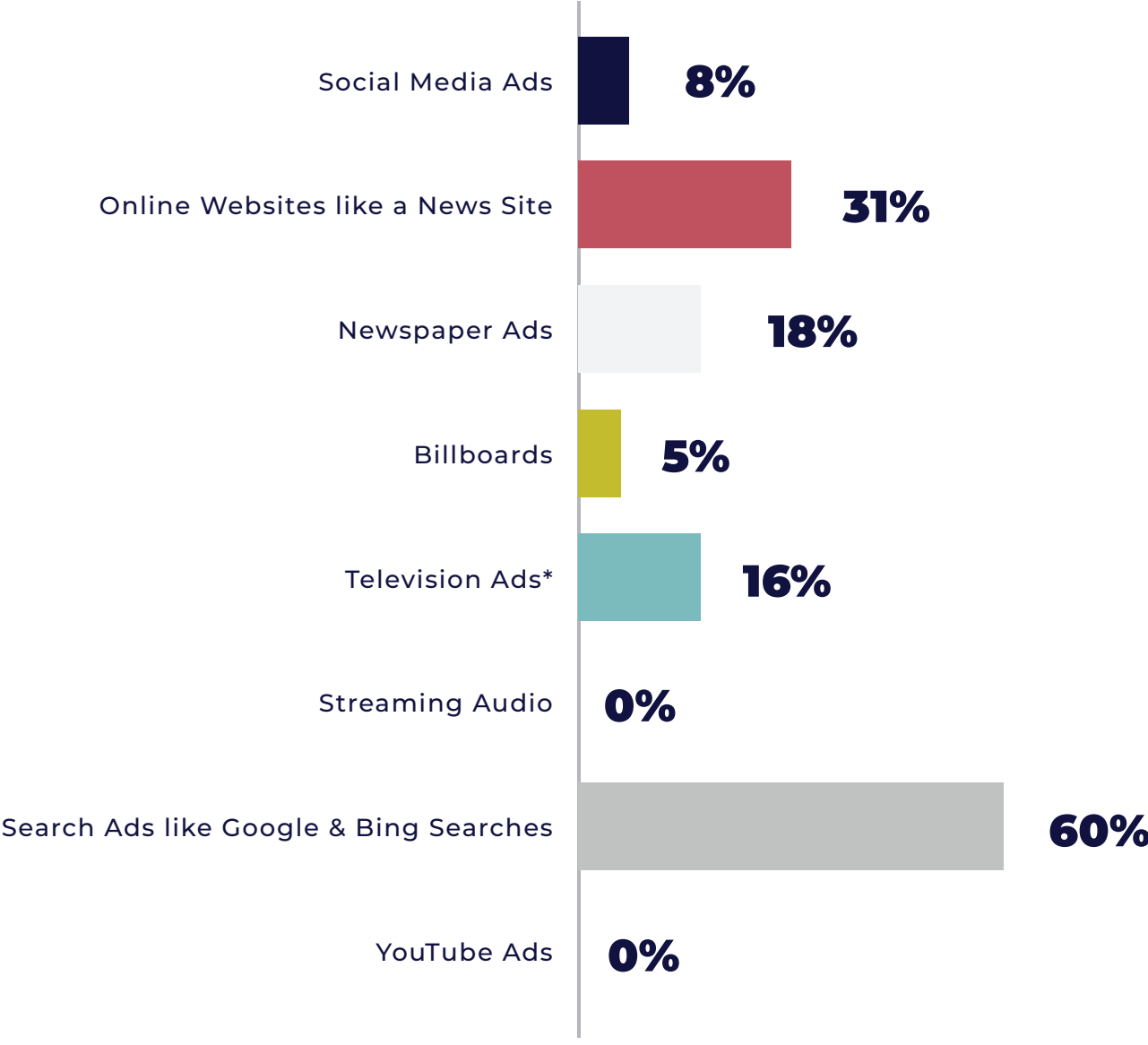
Where do you notice a practice's advertising?

Millennial: Age 27-42



Where do you notice a practice's advertising?

Older Boomers: Age 65+

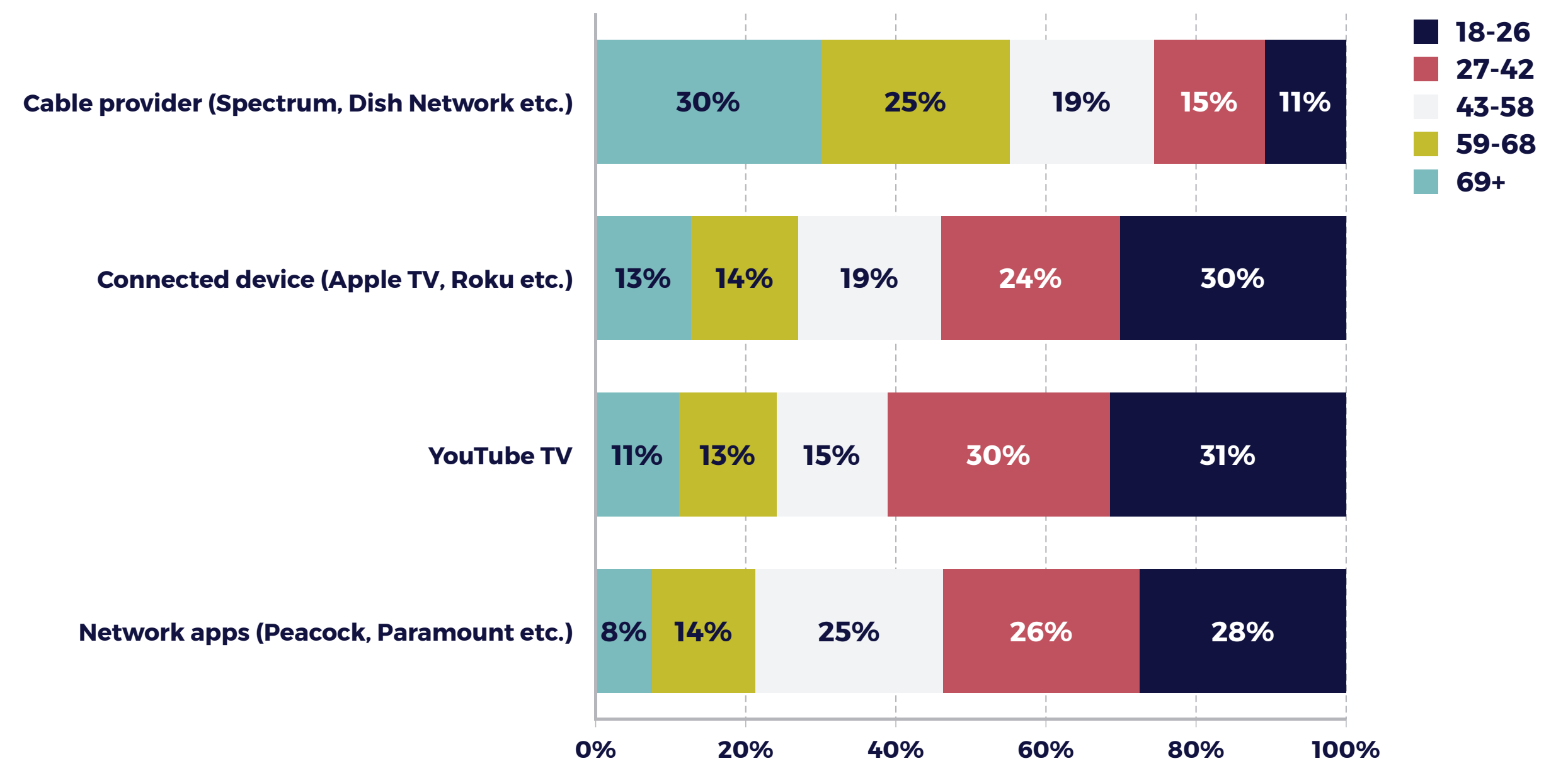


Television Doesn't Necessarily Mean Linear TV

Television is well represented in survey results across generations – and such high numbers in the younger generations may be surprising. However, the definition of “television” varies by age group. Younger generations have no recollection of the era of the “Big Three” broadcast networks, and even Boomers are shifting away from traditional cable and satellite providers for news and entertainment.

How do you watch TV?

'Television' means something different for different groups



The modern healthcare consumer's decision-making process is increasingly shaped by digital touchpoints. Our survey reveals how different generations use both online and off-line factors to select a primary practice.

This section examines how marketing strategies, third-party rankings, and demonstrations of online expertise differently impact Baby Boomers, Gen X, Millennials, and Gen Z when choosing healthcare providers.

Shopping for Primary Care – the Marketing that Makes the Difference for Each Generation

What the Data Says

- ◆ Gen Z ranks online articles by a physician as an influencer more highly than all others (more than 25% higher than Gen X and Boomers)
- ◆ All generations highly value recommendations by family and friends, but for Gen Z these recommendations are shared through social media contacts and local influencers as well as family.
- ◆ Rankings and online reviews are nothing new to Gen Z – they’ve chosen college classes using “rate my professor” and swear by online rankings for restaurants, clothing and cars. Practices who aren’t managing their online reputations on popular ranking sites or asking patients to share their experience could be missing out on this important influencer for Gen Z.

Shared their expertise in some way that I could access such as articles online

37%

Recommended by a family or friend

49%

Recommended by another healthcare provider

34%

Had positive online reviews

35%

Part of my insurance plan and had a profile on my insurance provider’s website

26%

Ran an ad that attracted me to their practice

13%

Doctor’s practice or expertise on a news website or on social media

13%

Age
18-26

What Marketers Can Do

Prioritize Social Media

Word-of-mouth and personal content sharing are paramount, with 49% valuing recommendations from family/friends and 37% valuing providers who share their expertise online. Marketers should prioritize creating shareable, educational content that providers can personally deliver through social media channels to leverage this trust-based marketing.

Traditional advertising shows very low effectiveness, with only 13% being influenced by ads. Instead of spending heavily on conventional advertising, practices should redirect resources toward building an authentic social presence while encouraging patient referrals through positive experience sharing.

Online reviews play a significant role (35%), suggesting practices need a proactive review management strategy. This should include actively soliciting reviews from satisfied patients, responding professionally to all feedback, and featuring testimonials across digital platforms.

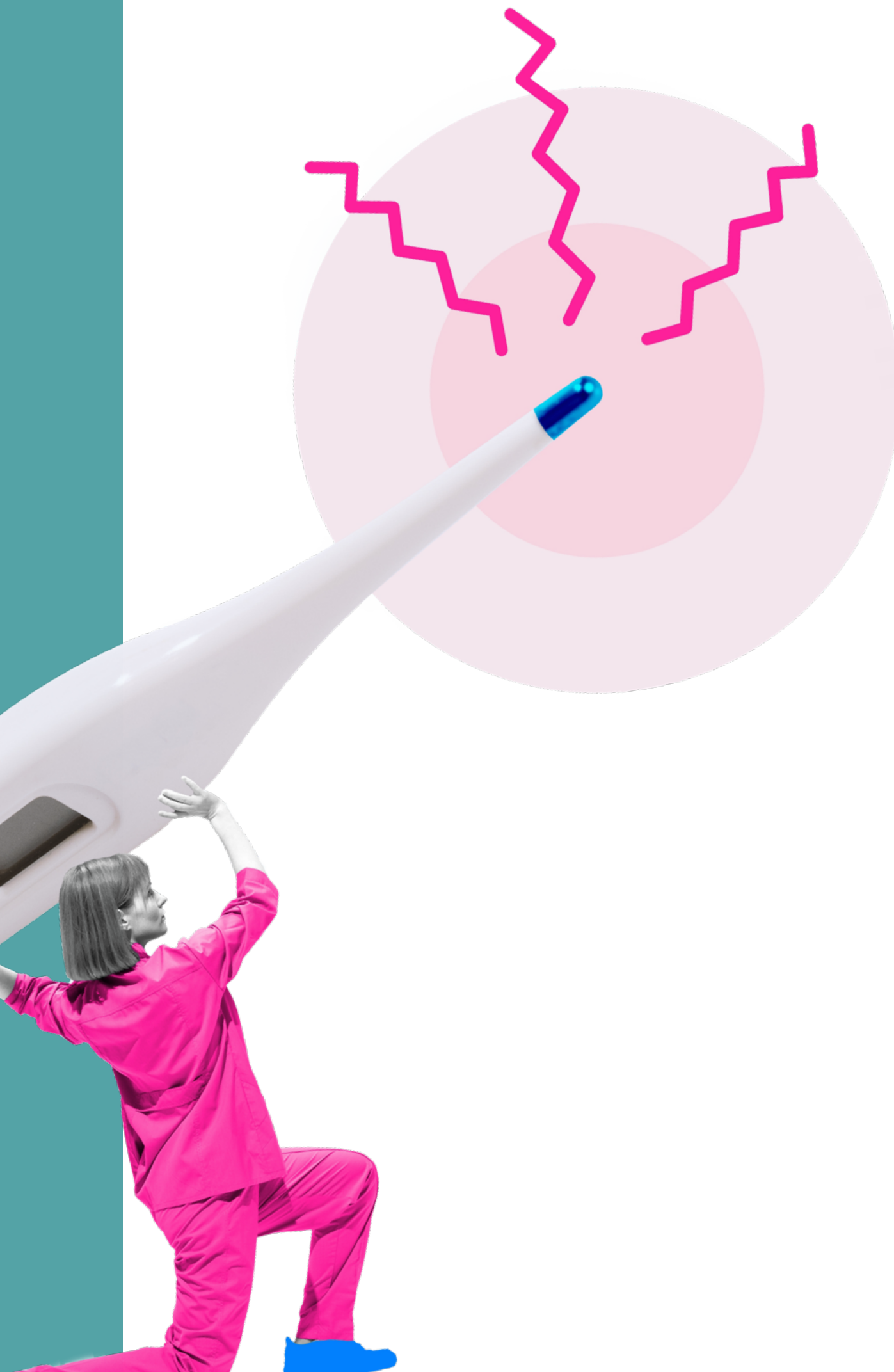
Insurance Website Listings:

The relatively high value (26%) placed on insurance provider websites indicates practices should ensure their digital presence and information is optimized and updated on insurance directories and provider search platforms, as Gen Z uses these as research tools.

Authentic Content: Given Gen Z's preference for authentic content over traditional marketing, practices should consider developing a content strategy that includes: Provider-led educational videos and posts about common health topics

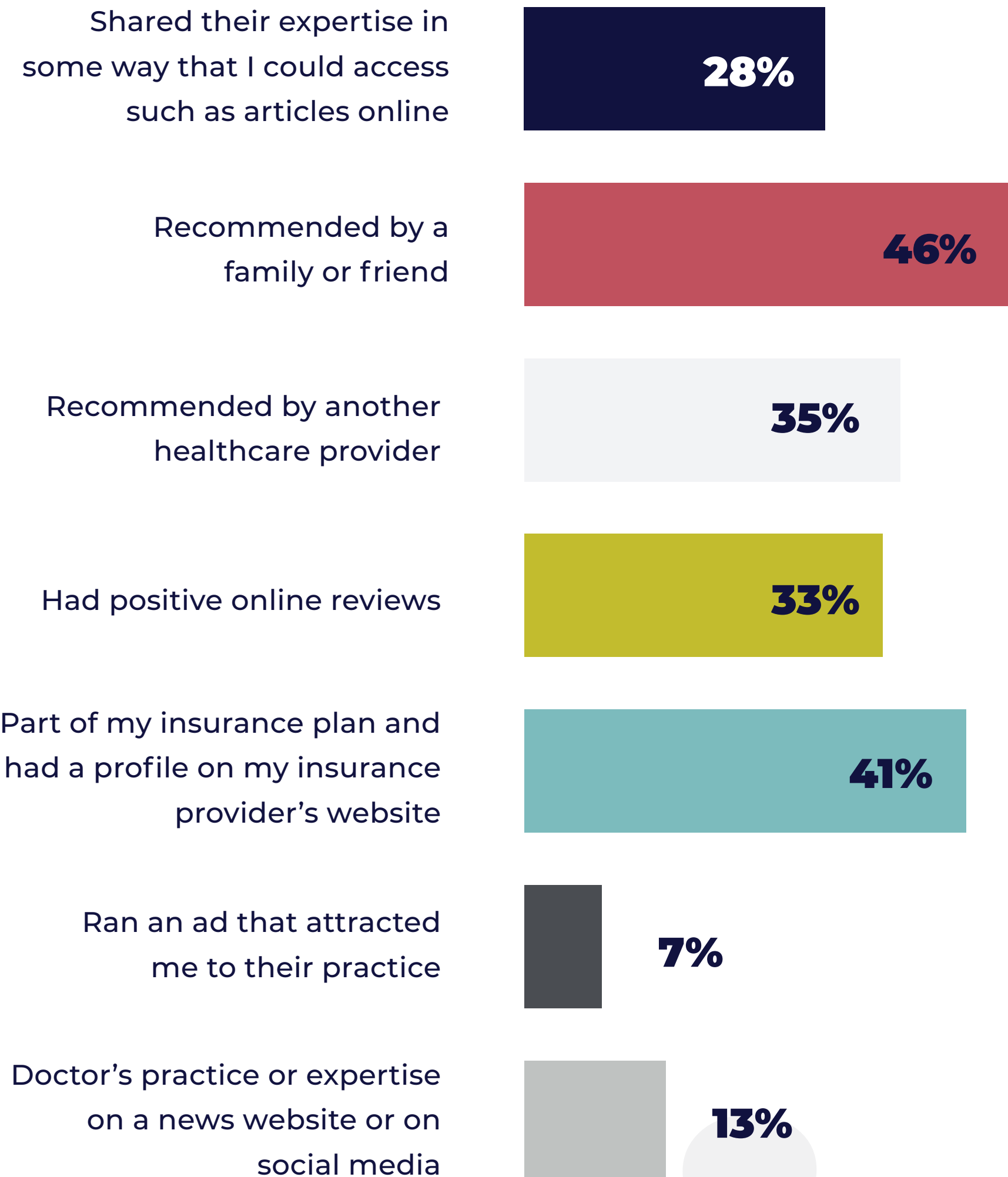
- ◆ **Behind-the-scenes looks at the practice to build familiarity and trust**
- ◆ **Patient success stories (with appropriate permissions)**

Regular health tips and preventive care information shared through social media



What the Data Says

- ◆ Millennials' reliance on insurance plan websites surpasses their Gen Z peers – most likely because they have their own insurance after age 26 and are making sure they are finding the providers that are covered by their policies.
- ◆ Millennials still have strong support for reading online blog articles by the practice as well as recommendations from other providers.
- ◆ Blogs written to inform prospects and patients can also be used in campaigns to influence the public and other providers.
- ◆ Millennials also use social media to seek recommendations from their “friends” and contacts. The more your practice is known and seen as a leader in your community, the more recommendations you'll receive when this cohort goes to social media to find a doctor.



Age
27-42

What Marketers Can Do

Influence the Influencers:

Personal recommendations still lead at 46%, but online expertise sharing (28%) is lower than for Gen Z. This indicates Millennials may prefer more structured, professional content over casual social media posts. Marketers should focus on creating informative content that reinforces their brand with community influencers while simultaneously engaging potential patients directly.

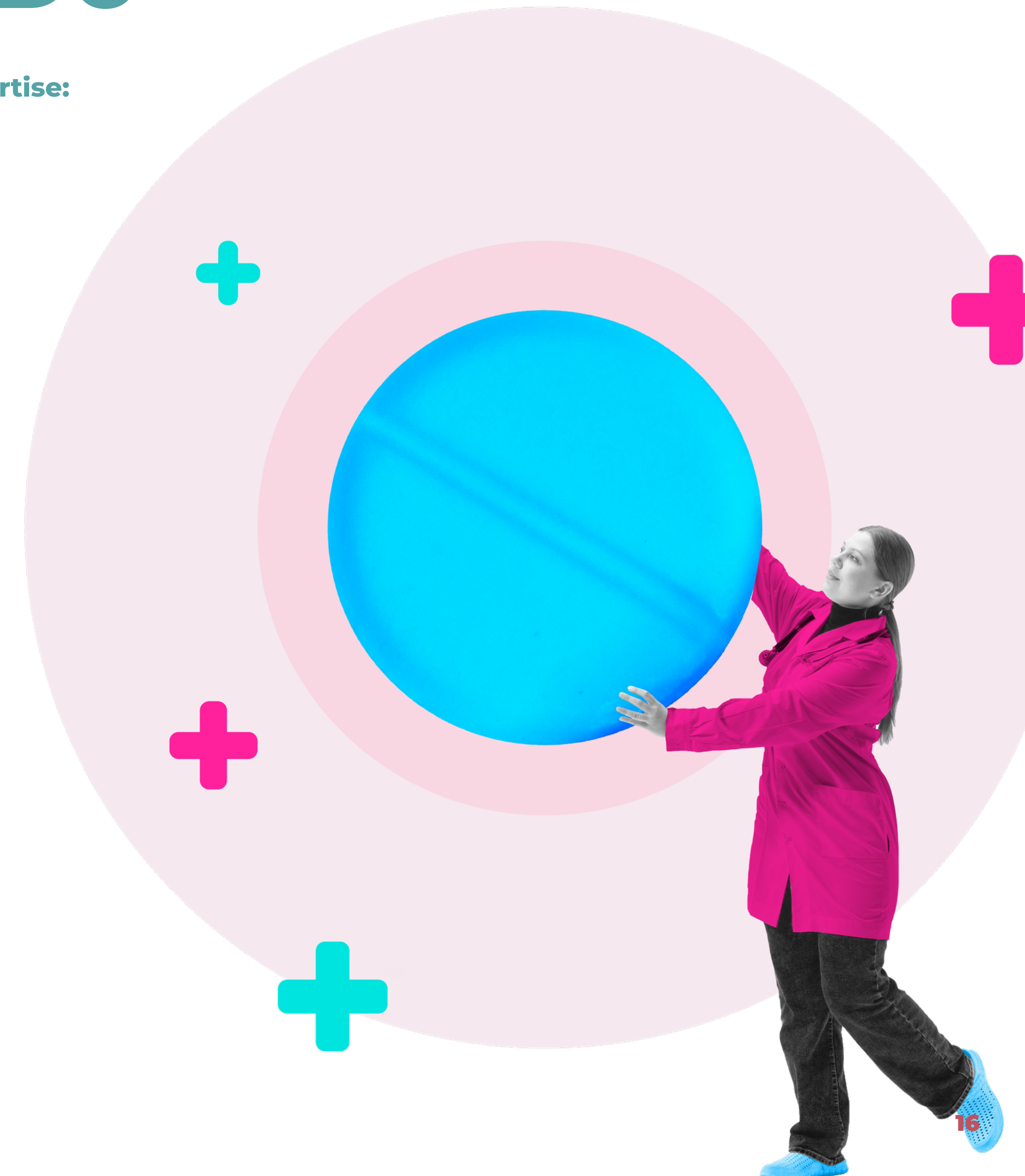
Online reviews maintain steady importance (33%), but traditional advertising performs very poorly (7%). This suggests practices should:

- ◆ **Actively manage their online reputation across platforms like Google Reviews and Healthgrades**
- ◆ **Invest in generating and responding to reviews rather than traditional paid advertising**
- ◆ **Feature verified patient testimonials on their website and social channels**

Sharing and Promoting Your Expertise:

With 28% valuing online expertise sharing, practices should develop a content strategy that includes:

- ◆ **Professional blog posts about health topics and medical advances**
- ◆ **Educational content about preventive care and wellness**
- ◆ **Clear communication about practice policies and procedures**
- ◆ **Expert commentary on current health trends and research**



What the Data Says

- ◆ Gen X's reliance on the insurance website is higher than their Millennial cohorts.
- ◆ Recommendations from another health provider as well as friends also increase with this group.
- ◆ Marketers seeking Gen X patients should consider a strategy that reaches Gen X influencers – family, friends and healthcare workers- to promote the expertise of the primary practice.

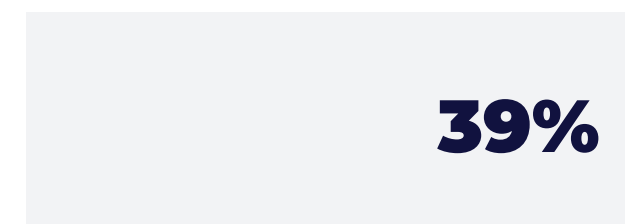
Shared their expertise in some way that I could access such as articles online



Recommended by a family or friend



Recommended by another healthcare provider



Had positive online reviews



Part of my insurance plan and had a profile on my insurance provider's website



Ran an ad that attracted me to their practice



Doctor's practice or expertise on a news website or on social media



Age
43-58



What Marketers Can Do

Insurance directory

presence is crucial, with 53% of Gen X valuing this channel - the highest of any marketing tactic. Practices should:

- ◆ **Maintain comprehensive, up-to-date profiles on insurance provider platforms**
- ◆ **Include detailed information about specialties, services, and accepted insurance plans**
- ◆ **Ensure accurate contact information and scheduling options are listed**

Share Personal Recommendations

Promoted through Social Channels: Recommendations are the second most influential factor (47%), suggesting practices should:

- ◆ **Implement patient referral programs**
- ◆ **Make it easy for satisfied patients to share their experiences**
- ◆ **Create shareable content that patients can easily pass along to friends and family**

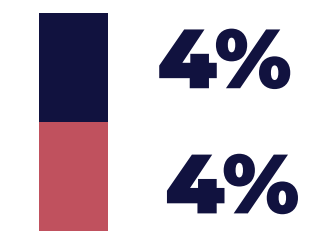
Online reviews matter to Gen X (30%) but less than to younger generations. Practices should

- ◆ **Maintain a consistent review management strategy**
- ◆ **Respond professionally to all reviews, both positive and negative**
- ◆ **Feature select testimonials on practice websites and materials**

What the Data Says

- ◆ Boomers' reliance on influencers is stronger than any other generation whether it's family and friends or another healthcare provider. To influence the Boomer, practices need to reach their communities to cement their brand awareness in order to be the practice family, friends and neighborhood social groups recommend when they are seeking a new practice.
- ◆ With changes in coverage and an eventual switch to Medicare, they rely heavily on insurance websites to find primary providers.
- ◆ Their reliance on online reviews drops 10-15 percentage points below other generations.

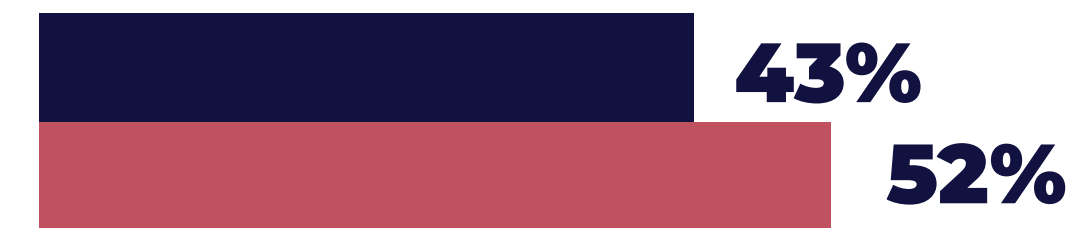
Shared their expertise in some way that I could access such as articles online



Recommended by a family or friend



Recommended by another healthcare provider



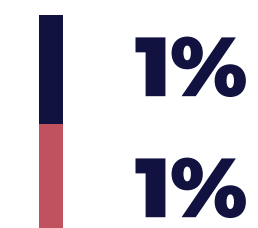
Had positive online reviews



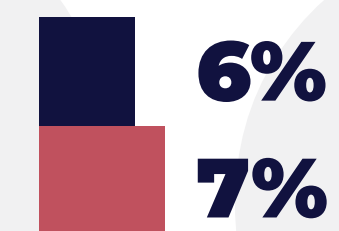
Part of my insurance plan and had a profile on my insurance provider's website



Ran an ad that attracted me to their practice



Doctor's practice or expertise on a news website or on social media



Age 59+

What Marketers Can Do

Family and friends Influence

Advertising recommendations are equally important (46%) for both age groups:

- ◆ Reach younger family members and entire communities through targeted digital and social media platforms to build brand awareness
- ◆ Create easily shareable print materials for patients and key influencers to pass along to prospective patients

Insurance platform presence is crucial but with a generational split:

- ◆ Younger Boomers (56%) rely heavily on insurance provider websites
- ◆ Older Boomers (44%) use these platforms less frequently
- ◆ Practices should maintain comprehensive insurance directory profiles but supplement with other channels for older segments

Healthcare provider recommendations show strong influence:

- ◆ 52% of older Boomers value provider recommendations
- ◆ 43% of younger Boomers trust provider referrals
- ◆ Focus on building strong referral networks with other healthcare providers
- ◆ Create professional materials specifically for provider-to-provider communication

Online reviews have moderate importance:

- ◆ 24% of younger Boomers consider online reviews
- ◆ 20% of older Boomers value review platforms
- ◆ Maintain a basic review management strategy
- ◆ Focus on key platforms like Google Reviews and healthcare-specific sites

**Shopping
for Specialty
Care**

When it comes to finding a specialist, each generation has their own needs. Our survey shows that while everyone needs specialty care at some point, the way people find and choose their specialists varies quite a bit depending on their age.

Older generations aren't the only ones shopping for specialty care. Millennials and Gen Z are actively seeking out specialists across the board, with the heaviest emphasis on orthopedics, OBGYN and dermatology – they're just doing it differently than their parents did. As populations age, we see more utilization of eye and heart specialists.

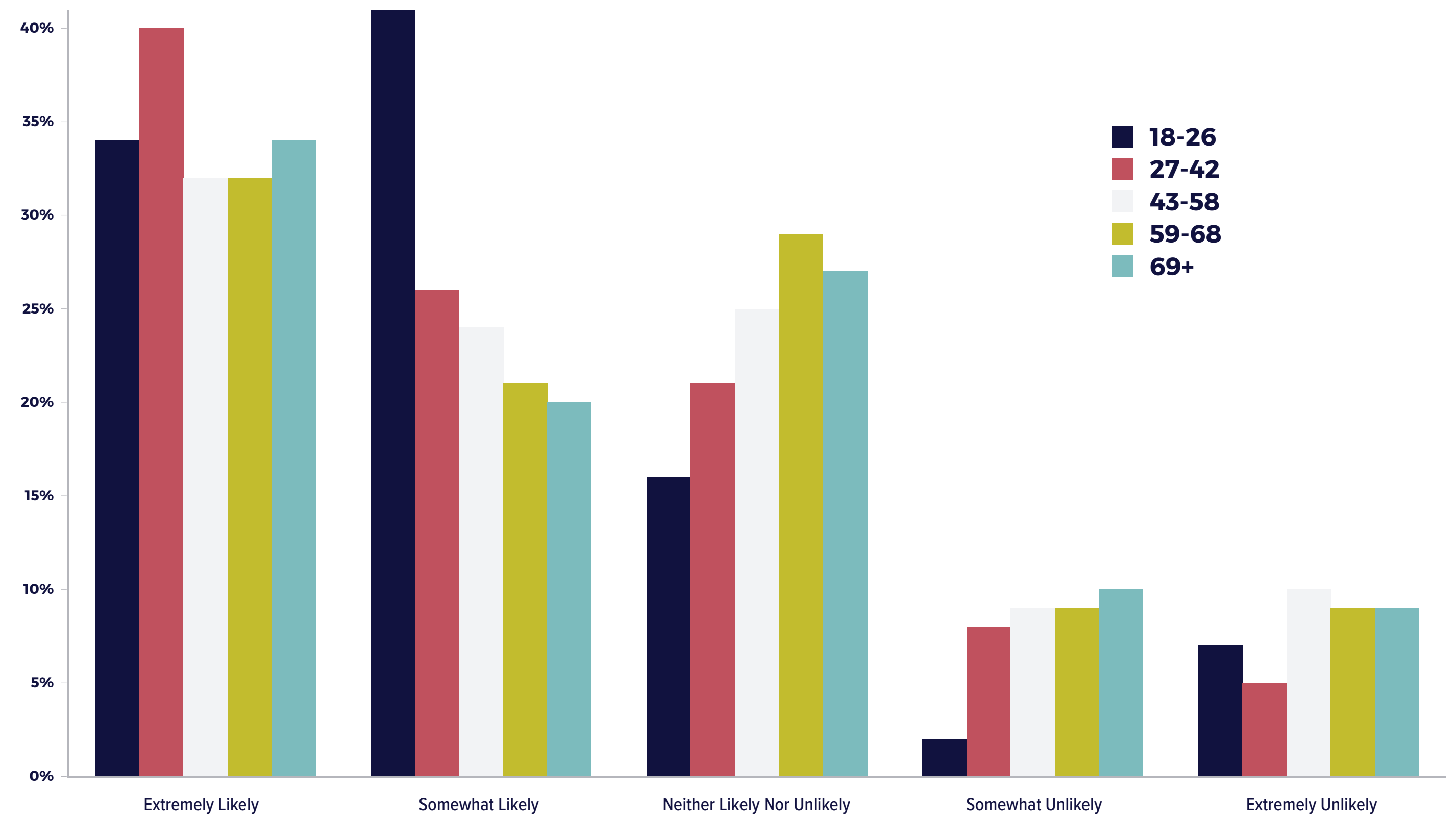
While Boomers typically rely on their primary care doctor's recommendations and insurance networks, younger patients approach finding a specialist more like they would shop for any other service, looking at things like convenient scheduling, online presence, and what other patients have to say, alongside a doctor's credentials.



All Generations Are Likely to Seek Specialty Care within 6-12 Month

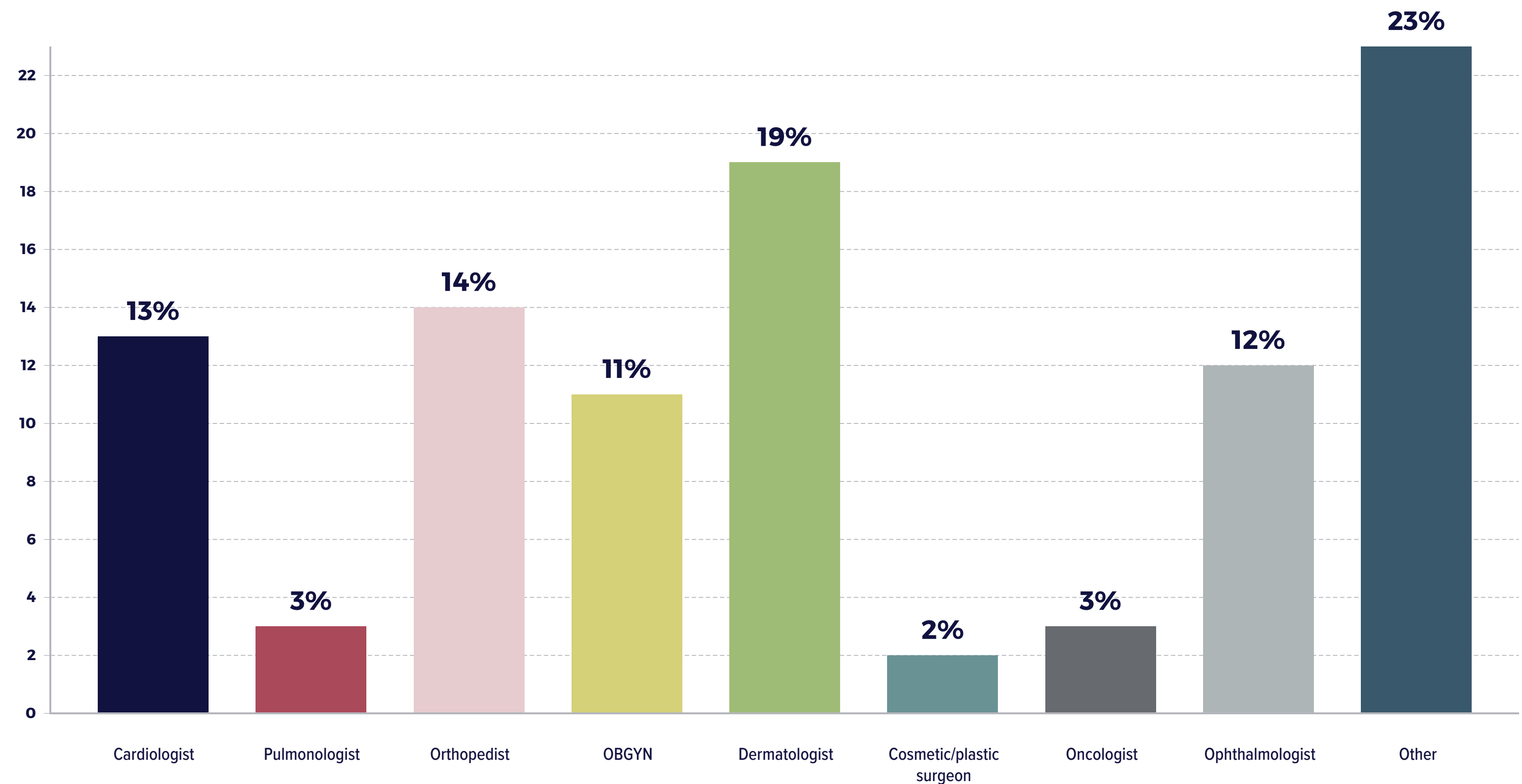
A majority of every generational group expects to see a specialist in the next 6-12 months.

- ◆ 75% of Gen Z is somewhat or extremely likely to see a specialist
- ◆ 66% of Millennials
- ◆ 56% of Gen X
- ◆ 54% of Boomers



Most Likely Specialties Over All Generations

What Specialist will you see in the next 6-12 months?

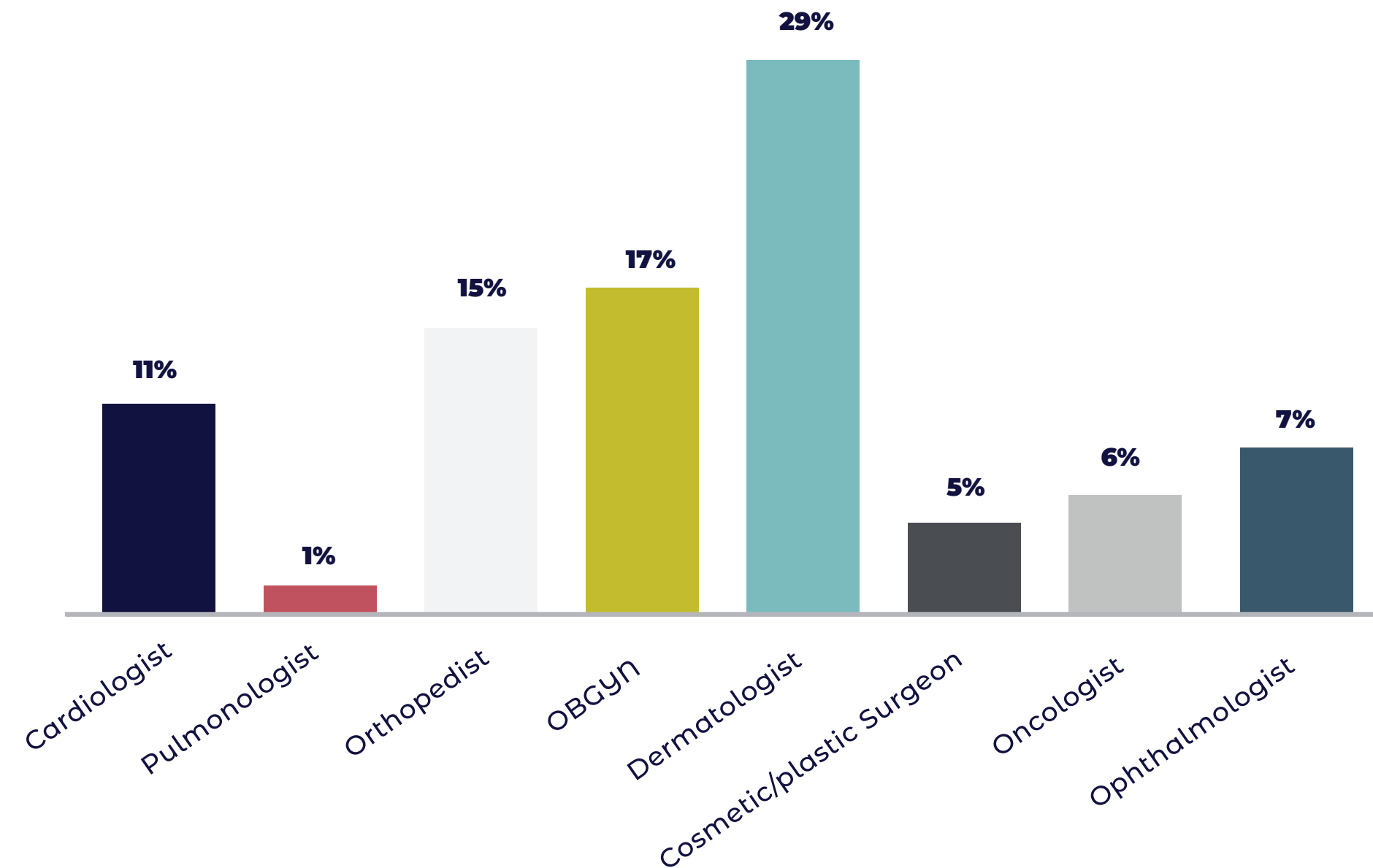


Over 20% of Responses Included the “Other”

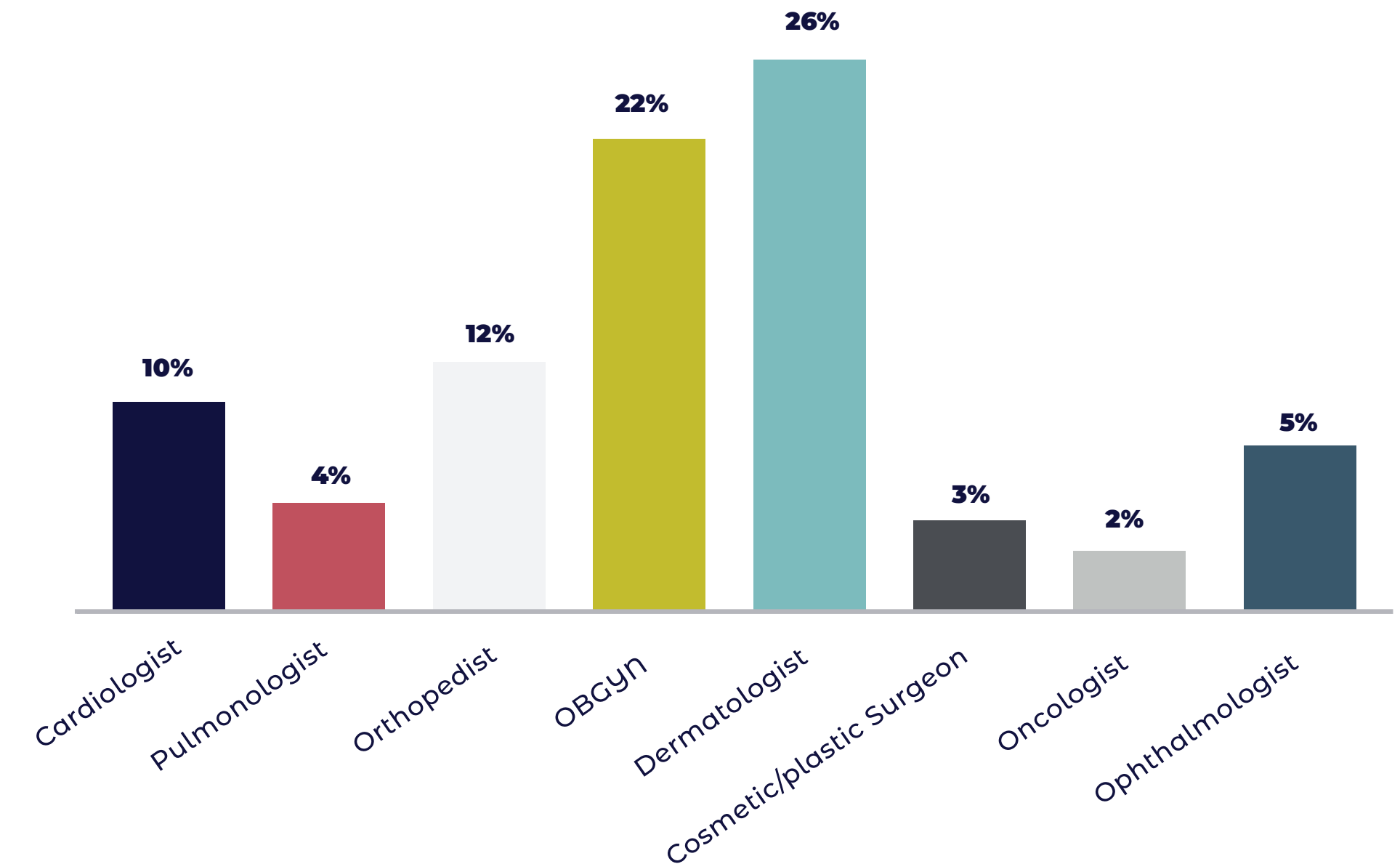


Most Likely Specialties by Each Generation

Gen Z Specialists

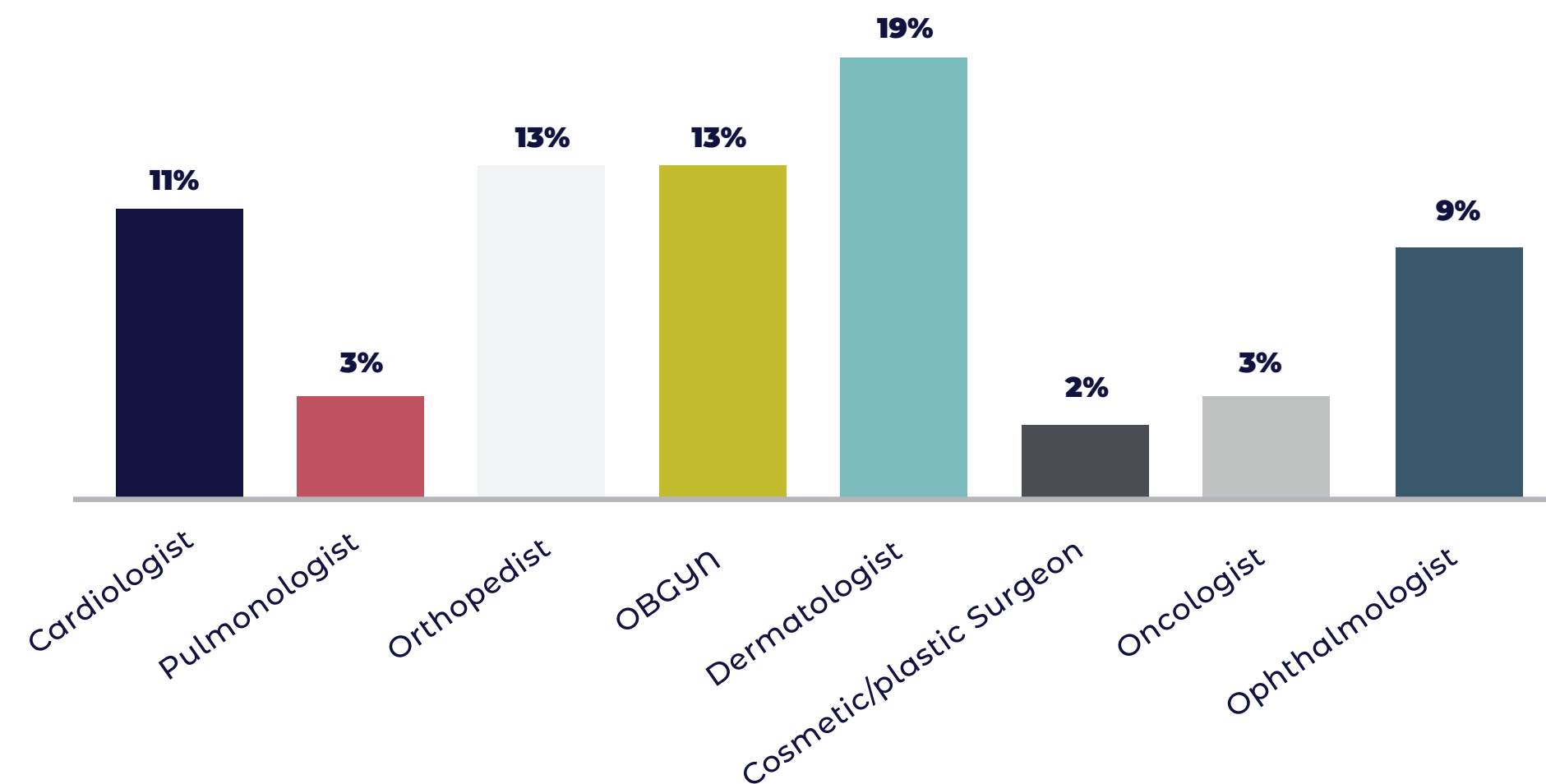


Millennial Specialists

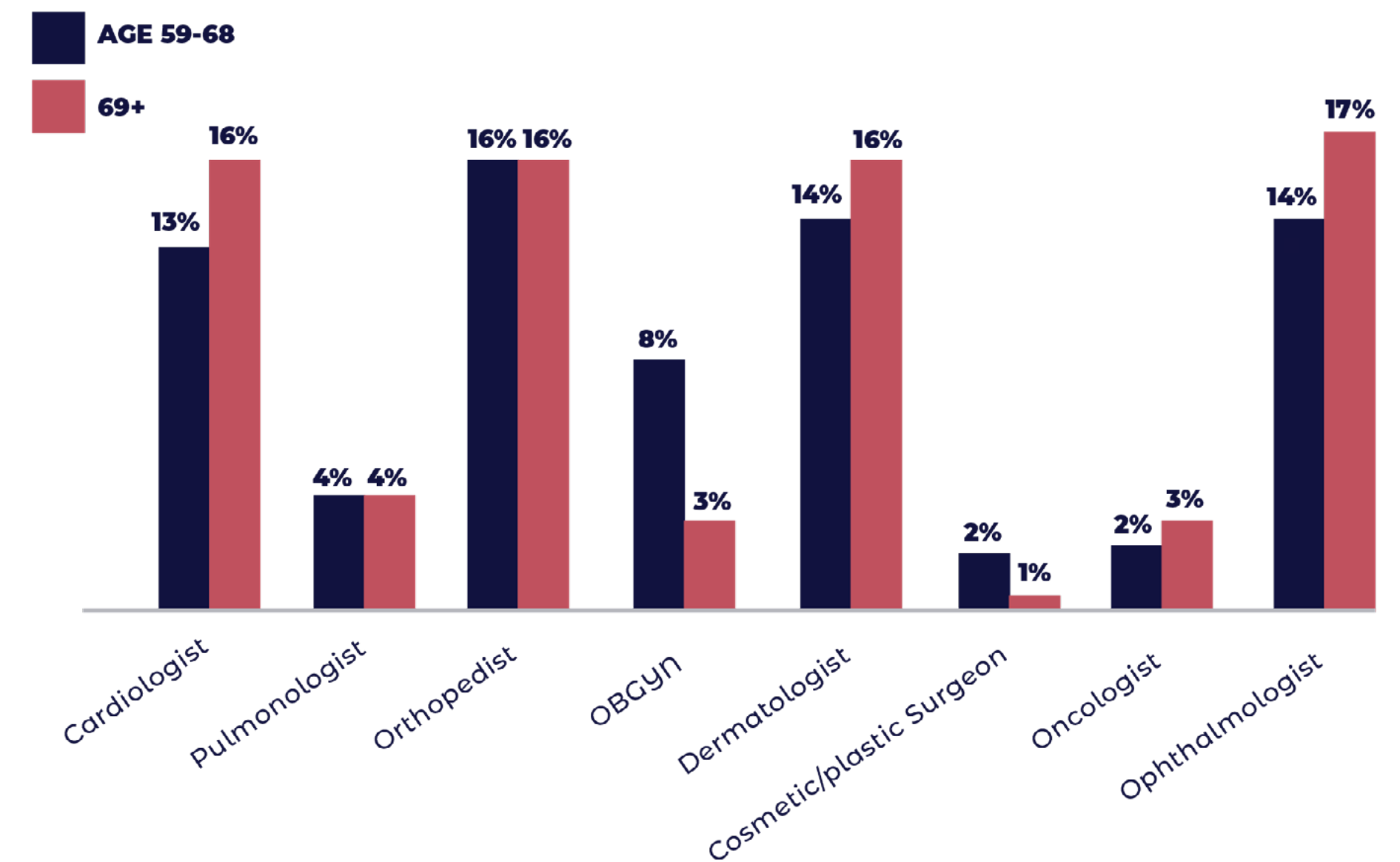


Most Likely Specialties by Each Generation

Gen X Specialists



Boomer Specialists



Generational dynamics significantly influence how patients choose specialists, even in widely utilized fields like dermatology and orthopedics. Younger patients often turn to dermatologists for acne treatment or cosmetic procedures, while older adults focus on skin cancer care. Similarly, younger generations seek

orthopedic care for sports injuries and prevention, whereas aging patients prioritize arthritis treatment and joint replacements. These distinct priorities highlight the importance of tailored marketing strategies that speak directly to each demographic's unique needs and concerns.

Choosing a Specialty Practice

The aging population—with its increasing demand for specialized care—relies heavily on primary care physician referrals to identify trusted specialists. In contrast, younger generations are disrupting this referral-dependent model, leaning instead on self-directed online research and peer reviews to make healthcare decisions.

Let's look at the factors that heavily influence each generation when it comes to choosing one specialty practice over another.

Generational dynamics play a pivotal role in specialist selection, even within commonly utilized fields.

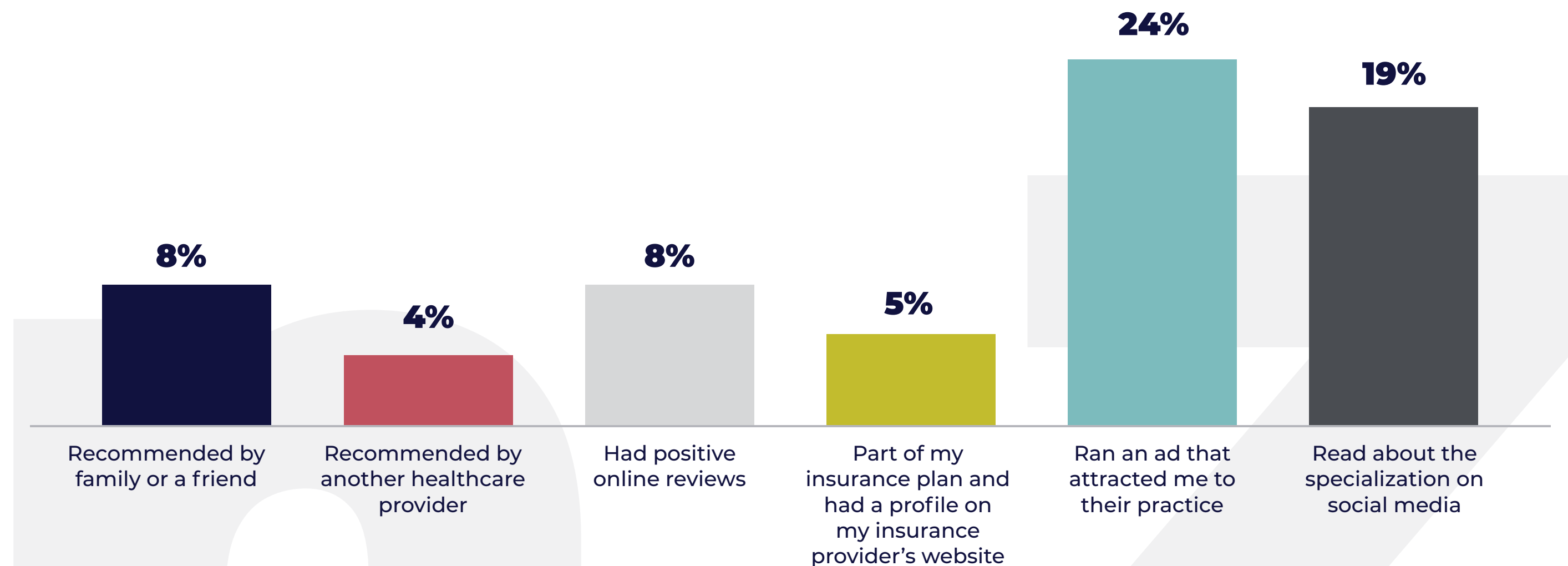
Gen Z Specialty Practice Decision Factors

Specialists aiming to attract younger patients must embrace a robust digital presence, leveraging strategies such as:

- ◆ **Content Marketing:** Regularly publishing educational articles, videos, and blogs that showcase expertise and address common patient questions.
- ◆ **Search Engine Optimization (SEO):** Ensuring online content ranks high in search results, making it easier for younger audiences to find.
- ◆ **Social Media Engagement:** Utilizing platforms like Instagram, TikTok, and LinkedIn for organic and paid posts to share success stories, explain procedures, and engage potential patients.
- ◆ **Digital Advertising Content Targeting:** Using content targeting puts your brand adjacent to relevant news articles, blogs, and research that your future patients are using to research their conditions or care options.

Gen Z is heavily influenced by advertising and social media information about a specialist.

They rely on recommendations 15%-20% less than their Gen X counterparts.



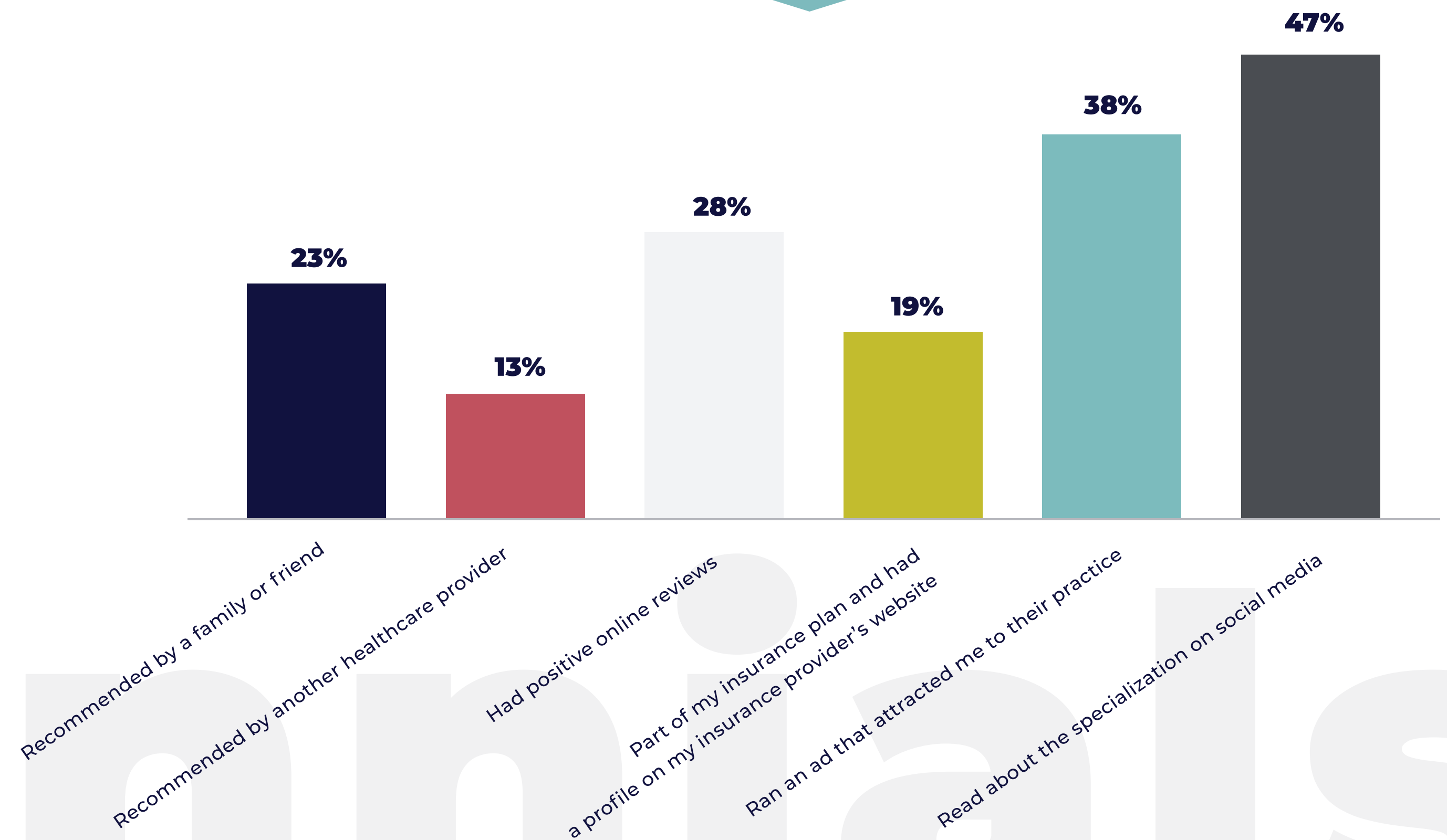
Millennial Specialty Practice Decision Factors

Millennials are a mix between single or married young professionals without kids, young families, and larger families with school aged children.

Millennials reliance on social media for specialist information increases 28% over Gen Z.

Their reliance on advertising is 14% higher than Gen Z and 18% higher than Gen X.

Recommendations, online reviews, and insurance websites were all more important to Millennials as well.



Reaching this diverse generation means employing a multi-pronged attack to put your practice on the top of their list.

Leverage Social Media Advertising and Presence (47%)

- ◆ Create visually engaging, relatable, and educational content on platforms like Instagram, TikTok, and Facebook.
- ◆ Use targeted ads highlighting specific treatments or success stories to capture millennial interest.
- ◆ Encourage interaction with features like polls, Q&A sessions, and live streams to foster trust and familiarity.

Encourage Positive Online Reviews (28%)

- ◆ Ask satisfied patients to leave reviews on Google, Yelp, and healthcare-specific platforms.
- ◆ Address negative reviews promptly and professionally to maintain credibility.
- ◆ Highlight testimonials on the practice's website and social media channels.

Utilize Online Educational Content (38%)

- ◆ Publish blogs, articles, and videos that address common health issues, procedures, and treatments.
- ◆ Include patient-friendly language and visuals to make content accessible and engaging.
- ◆ Partner with influencers in the health or wellness space for broader reach.

Optimize Insurance Compatibility Information (19%)

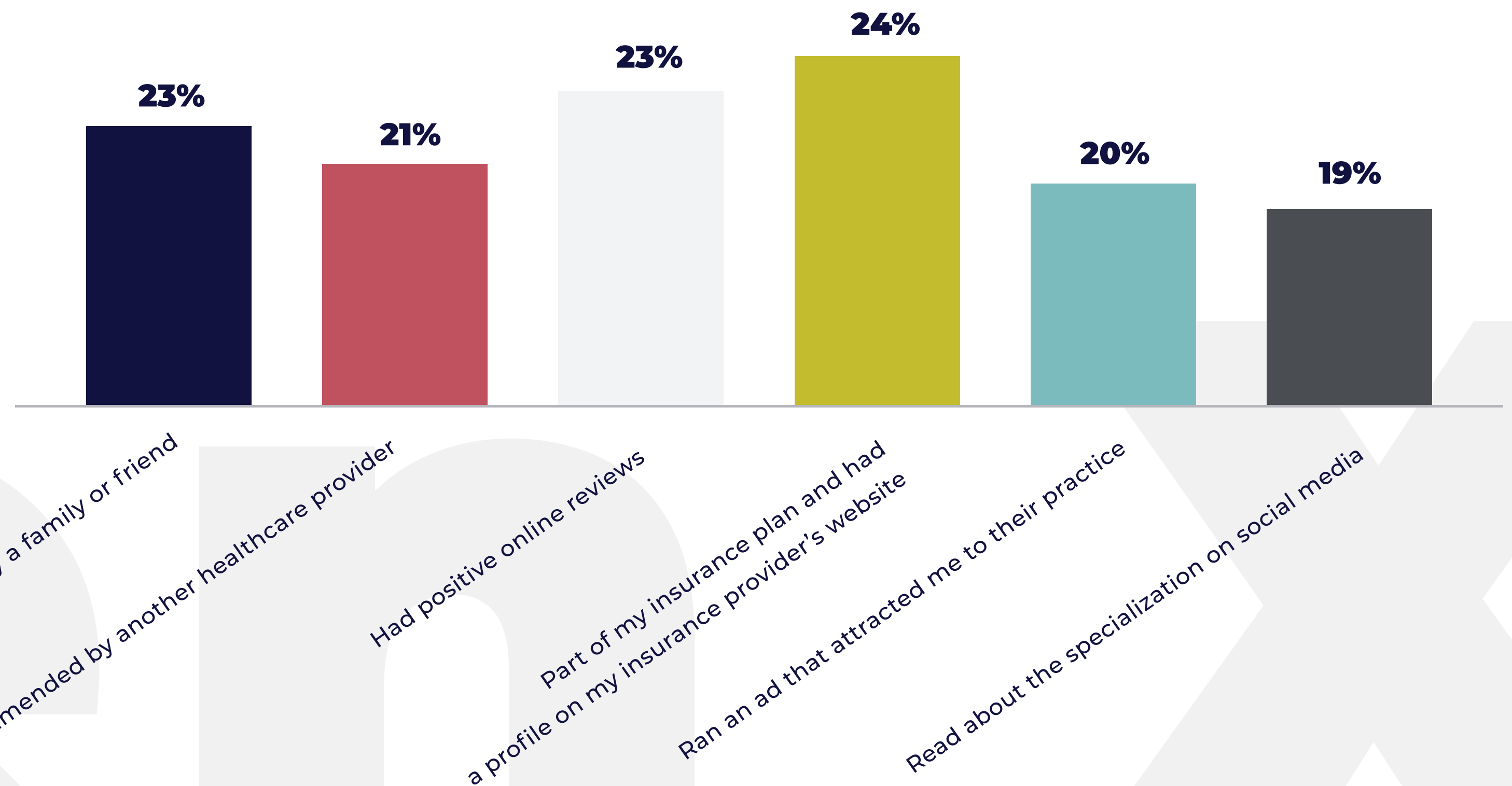
- ◆ Ensure insurance acceptance details are prominently displayed and searchable on the practice website.
- ◆ Collaborate with insurance providers to feature the practice on their directories and educate patients on covered services.

Promote Through Trusted Referrals (23%)

- ◆ Incentivize current patients to recommend the practice through referral programs.
- ◆ Target referring physicians, communities and current patients with your marketing to remain top of mind as the trusted expert in your field.

Gen X Specialty Practice Decision Factors

Gen X responses were roughly equal across the influence channels. Reaching this “skeptical” generation will require specialists to promote content on websites and social platforms while maintaining a program of influencing communities and referring physicians.



What Marketers Can Do

Leverage Referrals and Recommendations (23%)

- ◆ Collaborate with primary care physicians and other trusted healthcare providers to build referral networks.
- ◆ Create testimonials from Gen X patients to establish credibility and build trust to use in digital ads and commercials on connected TV and pre-roll networks like YouTube.

Highlight Online Reviews and Testimonials (23%)

- ◆ Actively request reviews from satisfied patients, particularly those in Gen X, on platforms like Google, Yelp, and Healthgrades.
- ◆ Feature positive testimonials prominently on the practice's website and social media to resonate with this demographic.

Ensure Insurance Integration Visibility (24%)

- ◆ Clearly display accepted insurance plans on the website to address cost and compatibility concerns.
- ◆ Partner with insurance providers to ensure inclusion in directories used by Gen X patients.

Professional Branding and First Impressions (20%)

- ◆ Invest in visually appealing and user-friendly websites that convey professionalism and modernity.
- ◆ Use photos and videos showcasing specialists' credentials, patient care ethos, and a welcoming clinical environment to leave a positive impression.

Utilize Social Media (19%)

- ◆ Focus on platforms Gen X frequents, such as Facebook and LinkedIn, to share informative content and updates.
- ◆ Post stories of successful patient outcomes, practice updates, and educational videos to foster engagement.

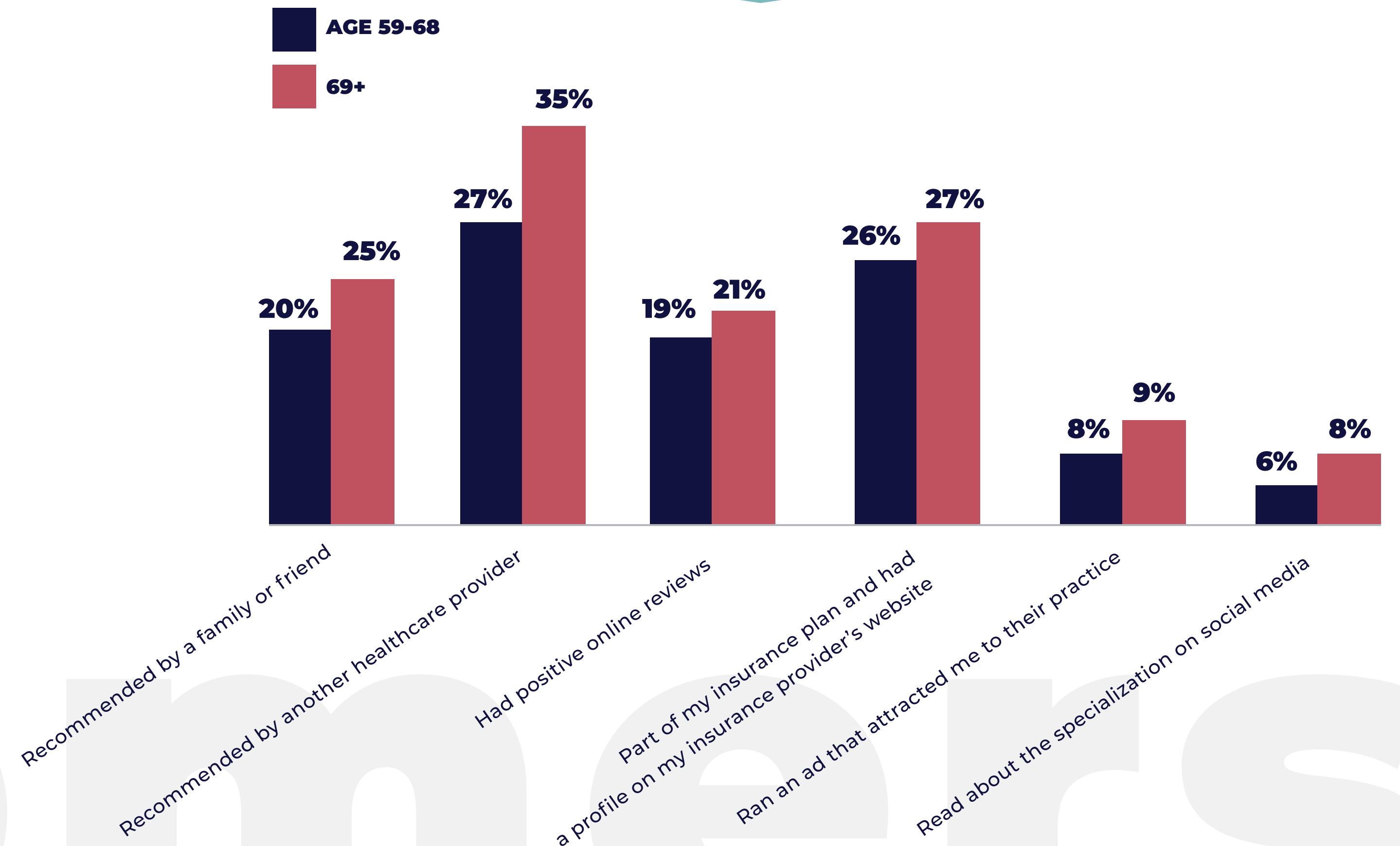


Boomer Specialty Practice Decision Factors

Boomers have a traditional approach to choosing a specialist. For much of their lives, they depended on physician-to-physician referrals. Despite the advent of patient choice, they tend to fall back to the old habits.

Boomers are almost the inverse of Gen Z when it comes to social and advertising influences.

The percentages of this population relying on familiar recommenders or providers is similar to Gen X. Older Boomers trust the authority of other healthcare providers who recommend specific specialists.



What Marketers Can Do

Strengthen Relationships with Primary Healthcare Providers (27%-25%)

- ◆ Collaborate closely with primary care physicians and other healthcare providers who serve Boomers to establish a trusted referral network.
- ◆ Targeted digital marketing to referring physicians and other healthcare providers.
- ◆ Ensure clear communication of expertise and specialization in referring providers through professional newsletters or educational webinars.

Build Trust Through Positive Online Reviews (19%-21%)

- ◆ Actively request reviews from satisfied Boomer patients on trusted platforms like Google and Healthgrades.
- ◆ Develop step-by-step guides to help less tech-savvy Boomers leave reviews easily.
- ◆ Share testimonials prominently on your practice website to instill confidence.

Highlight Insurance Compatibility (26%-27%)

- ◆ Ensure your website prominently displays insurance compatibility and accepted plans to address cost-related concerns.
- ◆ Work with insurance companies to be featured in their directories, which are often consulted by this demographic.

Educational Content Tailored to Health Concerns

- ◆ Provide educational resources focused on common Boomer needs (e.g., arthritis care, joint replacement, skin cancer prevention).
- ◆ Use blogs, downloadable guides, and newsletters distributed via email to foster trust and build an authoritative image.

Use Social Media Efficiently (6%-9%)

- ◆ While social media is less influential for Boomers, practices should still maintain a presence on platforms like Facebook to share educational content and updates.
- ◆ YouTube is another platform that many Boomers use to research topics and view long-form explainer videos. Publishing your expertise in these formats and targeting Boomers with content promotion can bring them to you.
- ◆ Use social media for events, such as virtual Q&A sessions or online community talks, which can resonate as non-commercial, community-driven efforts.

As healthcare continues to evolve toward a consumer-driven model, specialists and providers must adapt their strategies to meet the distinct needs and preferences of each generation. Baby Boomers prioritize credibility and personal connections, making strong relationships with primary care providers and a well-established online presence essential. Gen X, known for its analytical approach, values detailed patient reviews, provider transparency, and expert-driven content shared through social media and content marketing. For Millennials and Gen Z, a dynamic social media presence is crucial—

they rely on these platforms for recommendations, educational content, and thought leadership. To stay competitive, healthcare providers must embrace digital tools, targeted social media strategies, and transparent communication to engage patients effectively across all generations. By recognizing these generational differences and leveraging digital engagement, specialists can build lasting connections and thrive in an increasingly competitive healthcare landscape.

CONCLUSION

We're Healthcare Marketing Experts. We're Here to Help.

Advance Healthcare Marketing is a digital marketing agency specializing in healthcare marketing for hospitals and health systems, private practices, and seniors and home health providers. Our partnerships help healthcare organizations level up marketing strategies for doctor-to-doctor referrals and patient acquisition.



www.advancehealthcaremarketing.com