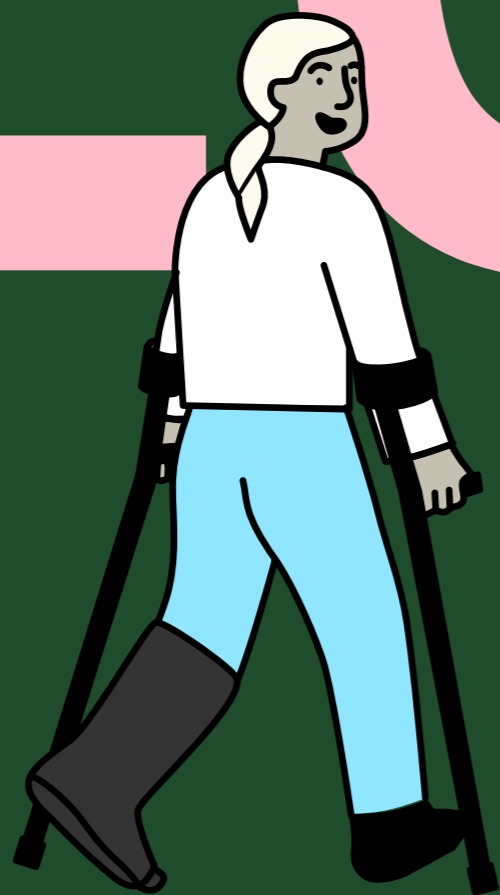


ZOCDOC REPORT

# 2024



# What Patients Want

A snapshot of patient preferences, behaviors and sentiments in 2024





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**2025 Predictions**

from Zocdoc founder & CEO Oliver Kharraz, MD



**Zocdoc**

In 2007, Zocdoc set out with a clear mission: to give power to the patient.

Today, Zocdoc is America's leading healthcare marketplace, helping patients connect with more than 100,000 providers across all 50 states.



Each month, millions of people visit **Zocdoc.com** or use our free mobile app to find quality healthcare providers. Every click tells us something new about patients' preferences, highlighting that each search and booking reflects a unique need, priority, and desire.

As we track year-over-year trends in our second annual **What Patients Want Report**, it's clear patient preferences are evolving. For instance, more patients are embracing mobile bookings. They increasingly want to find providers that can see them quickly, speak their language, and who show off their office space with multiple photos. While the top specialists booked remained the same this year compared to 2023, there were interesting changes in the top booked visit reasons. For example, Hyperactive Disorder (ADD / ADHD)

moved up to the 5th spot from 9th in 2023, while routine eye exams made the top 10 for the first time this year. Healthcare trends in the weight loss, dental, and skin care space also saw significant growth. Patients booked significantly more appointments this year for semaglutide consultations (e.g., Ozempic, Wegovy), jaw pain, teeth whitening, veneers, and blue light therapy, among others.

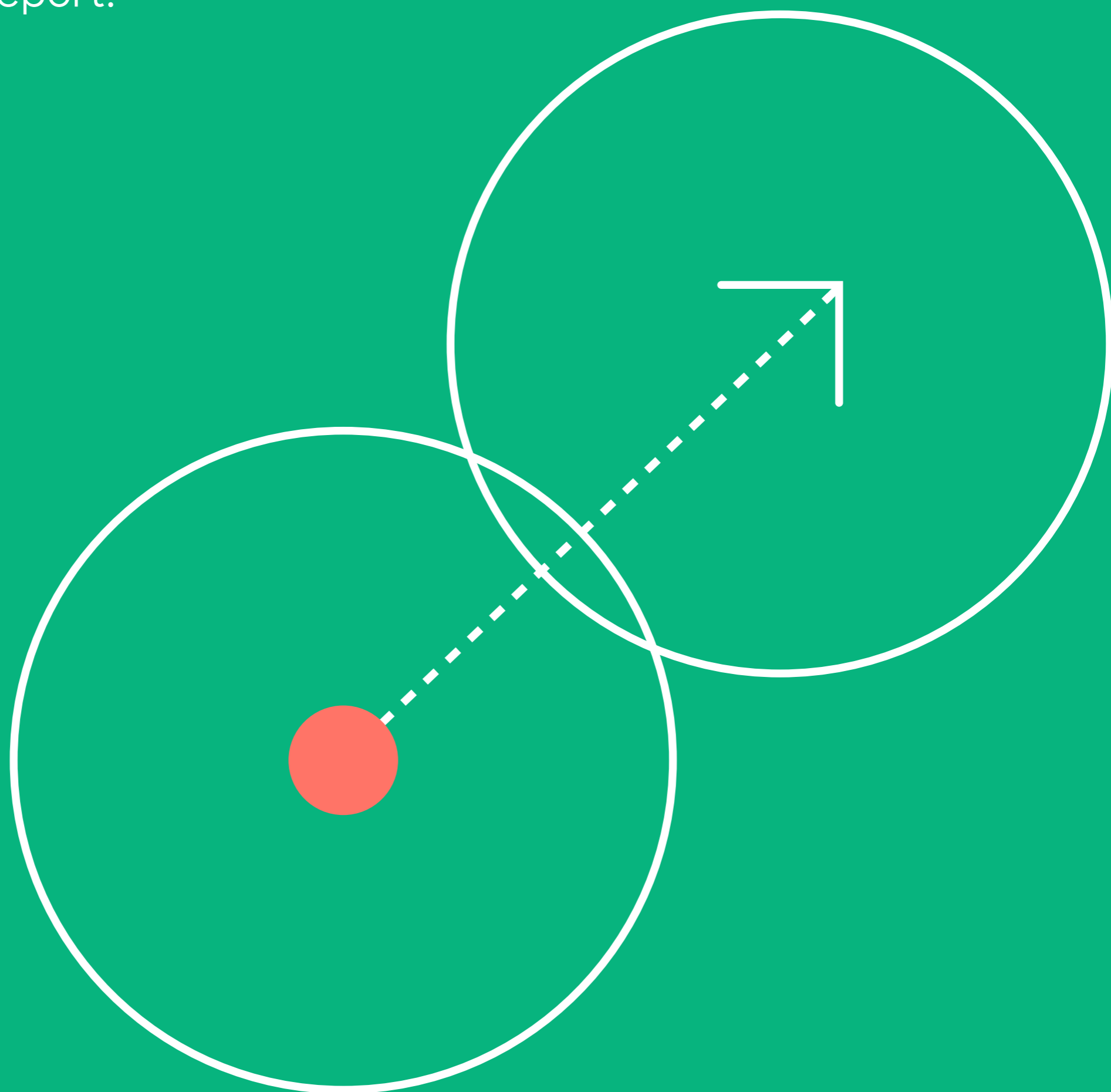
We also saw a shift in seasonality, with busy seasons for appointments moving from the New Year (January and March) in 2023 to back-to-school months (August and September) in 2024.

Read on for a snapshot of the key trends and insights in 2024 – and how they compared to 2023 – when it comes to what patients want.

## SECTION 1

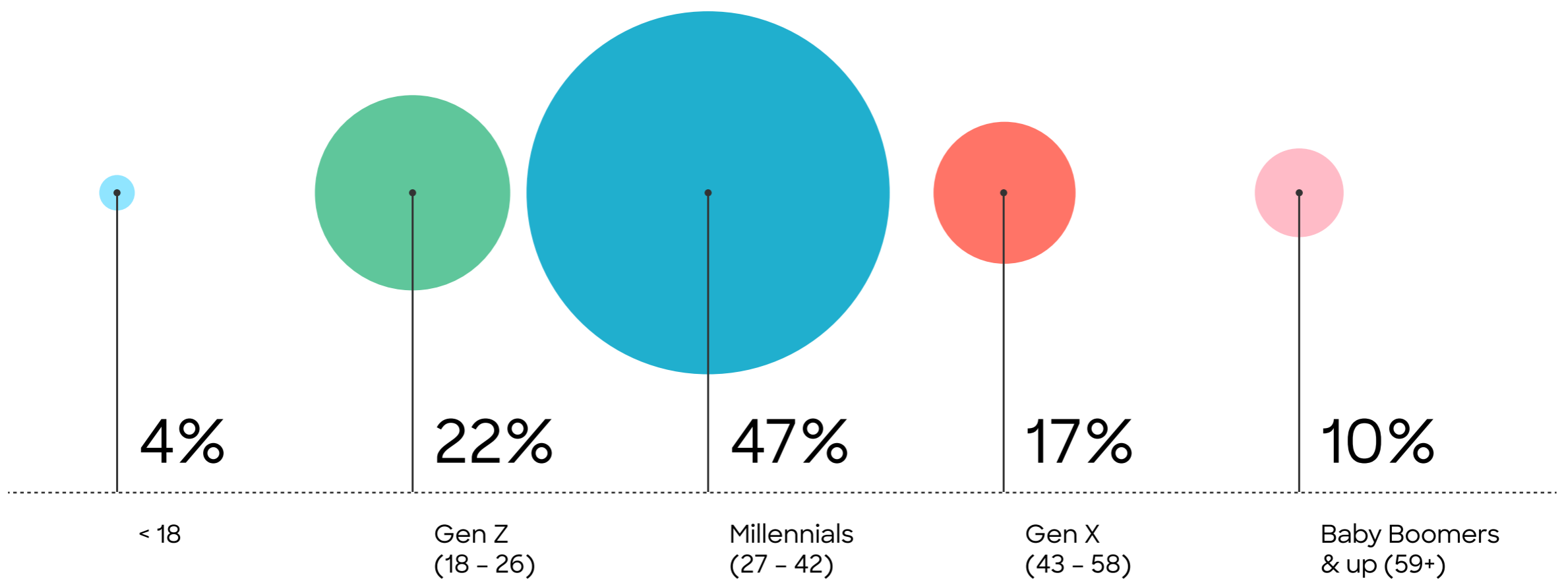
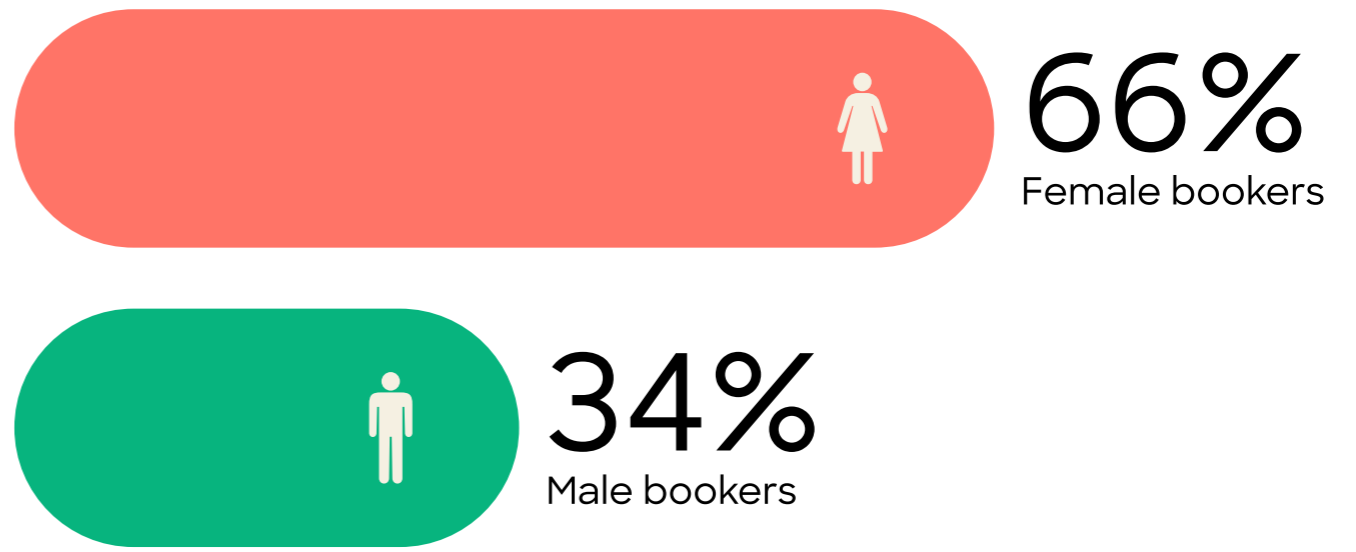
# Who is accessing care?

Before diving into what patients want, let's look at an overview of the bookers who are driving the insights within this report.



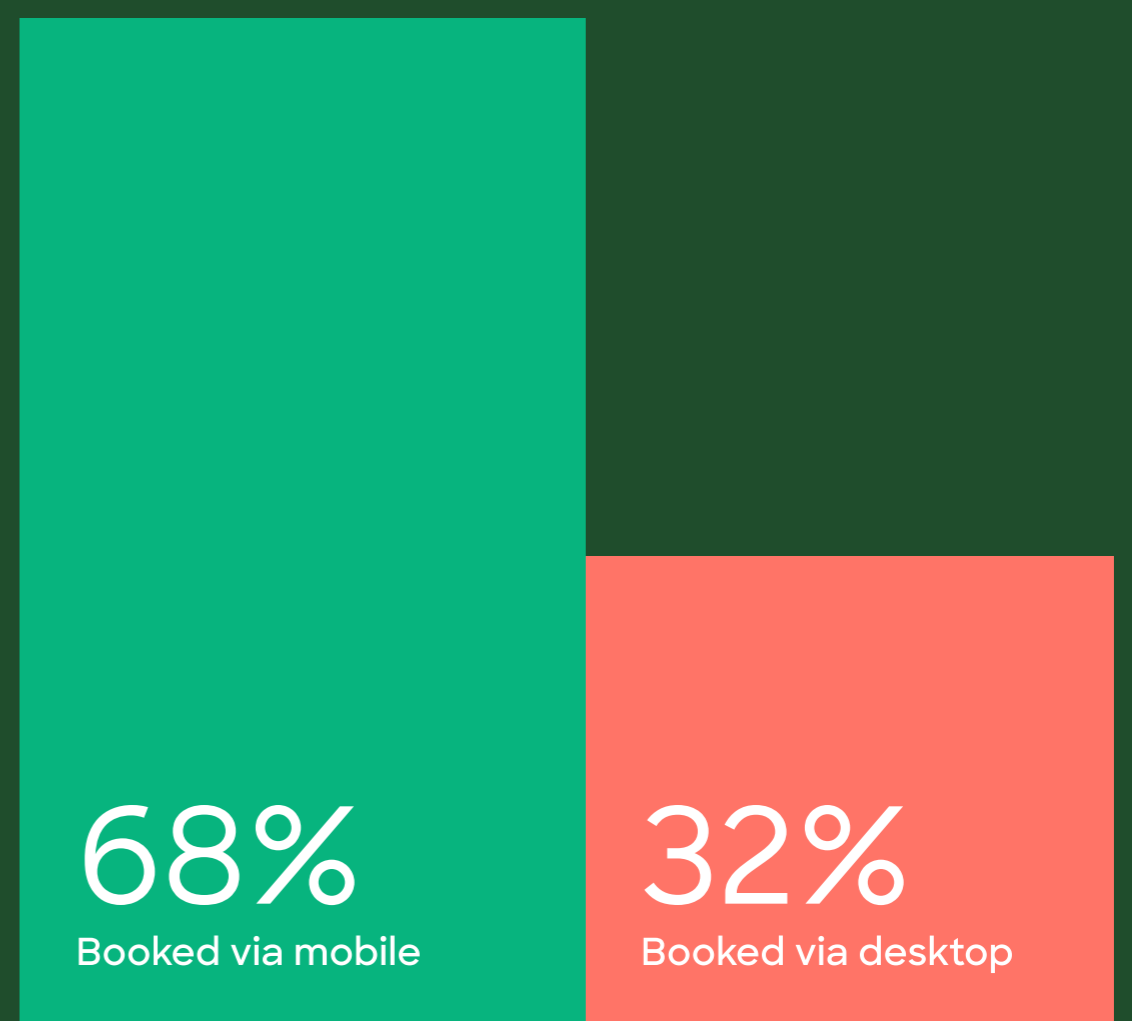
Roughly 2 out of 3 Zocdoc bookers were women

Nearly half of all bookers were Millennials



## Mobile bookings led the way

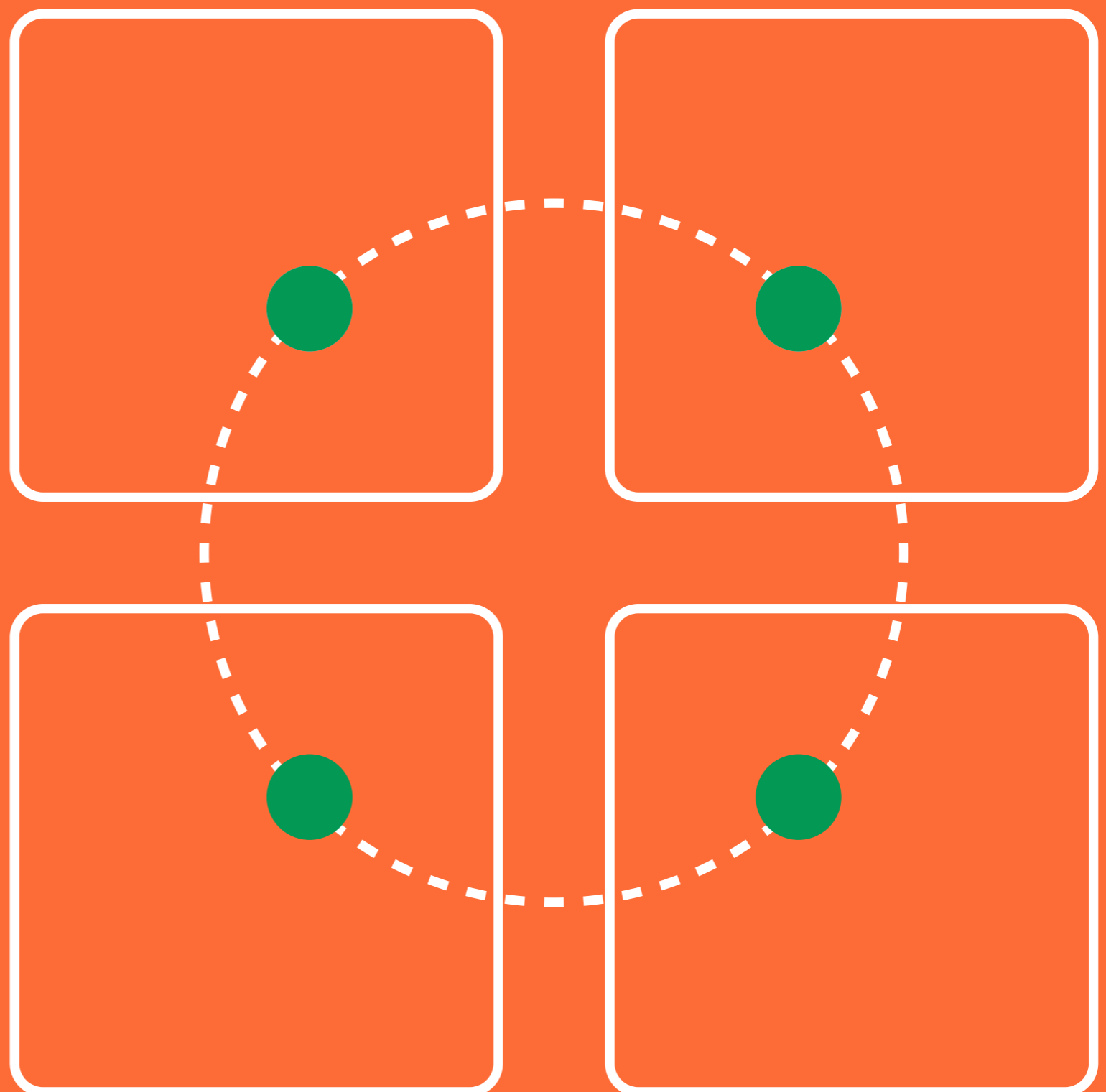
Mobile bookings were highest for urgent care, mental health and primary care. Desktop bookings were highest for optometrists and ophthalmologists.



SECTION 2

# What characteristics matter most to patients?

Patients are discerning. They looked at an average of **26 provider options** before booking.



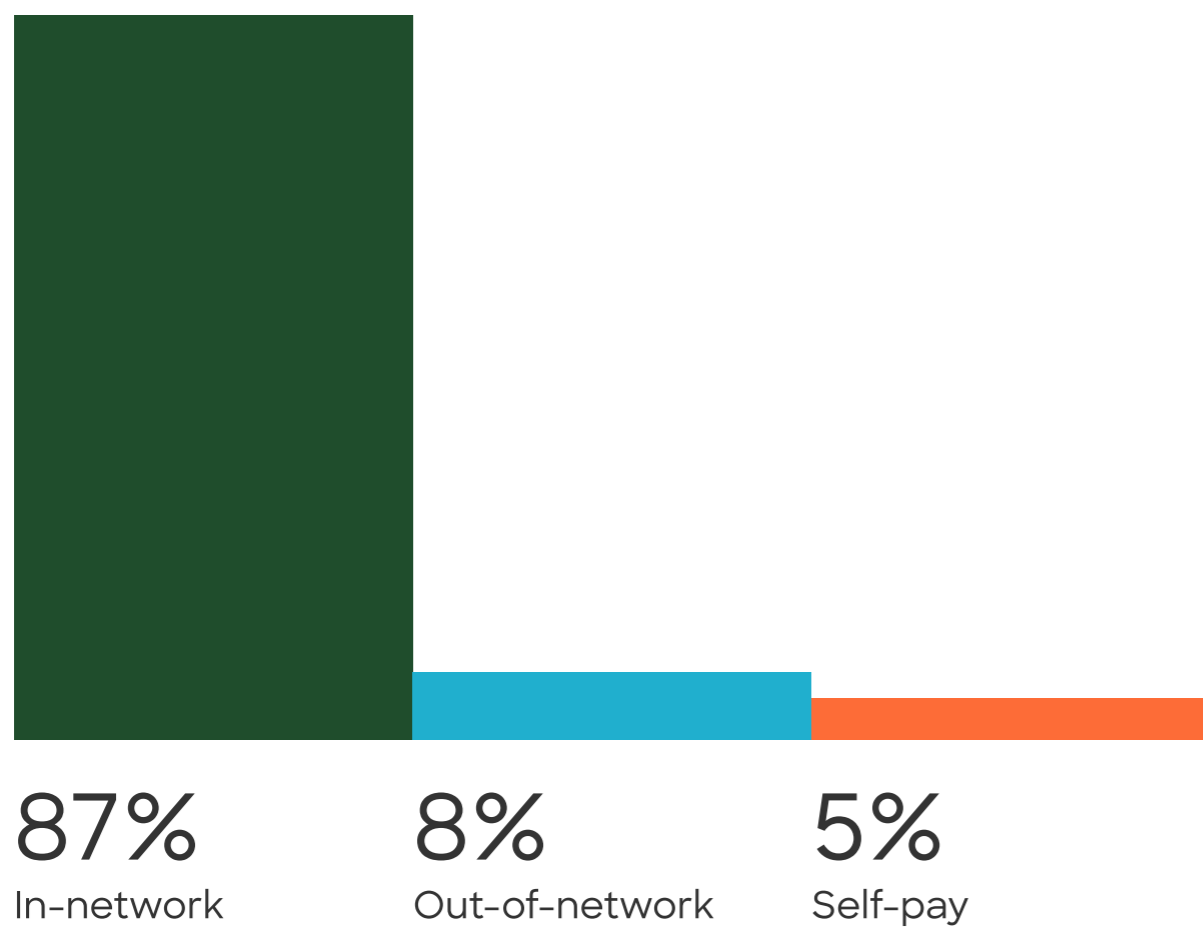
# Insurance matters

The majority of patients are looking for providers that take their insurance.

Nearly

## 9 out of 10 patients

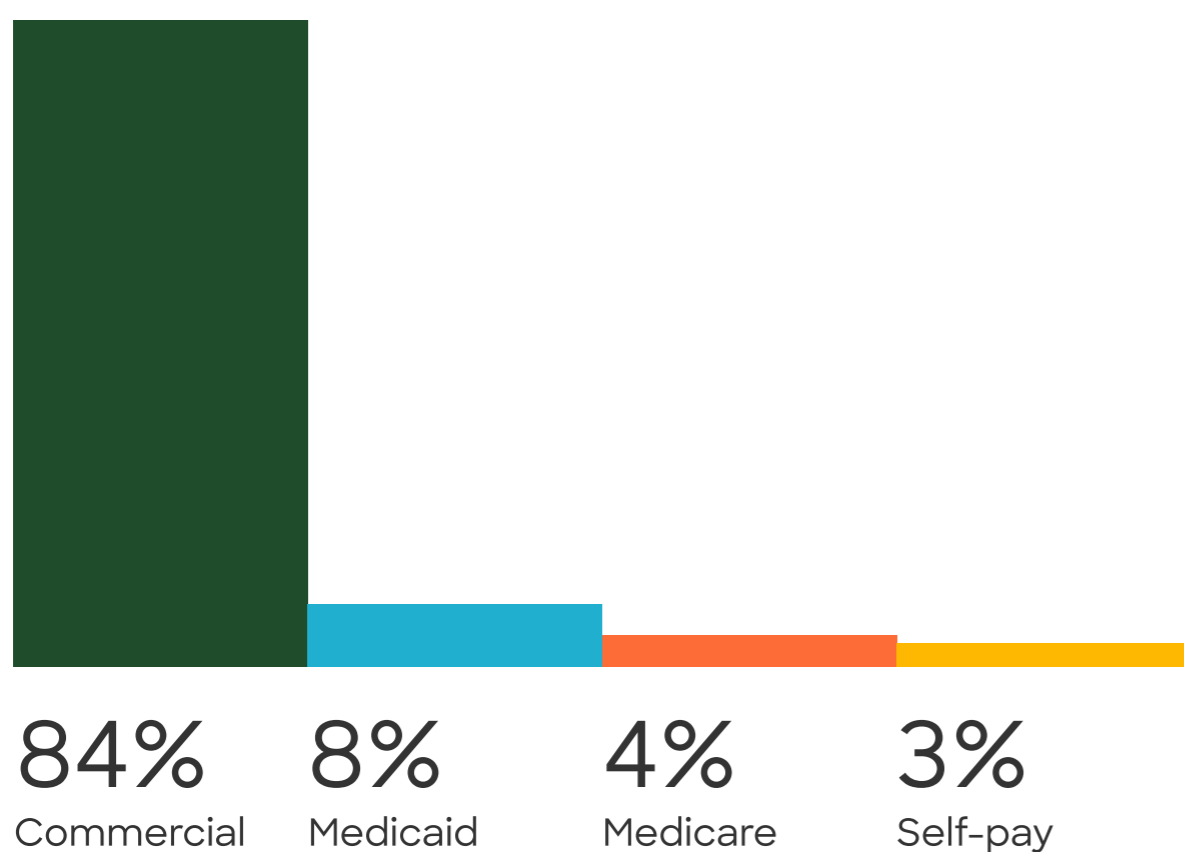
book with in-network providers.



More than

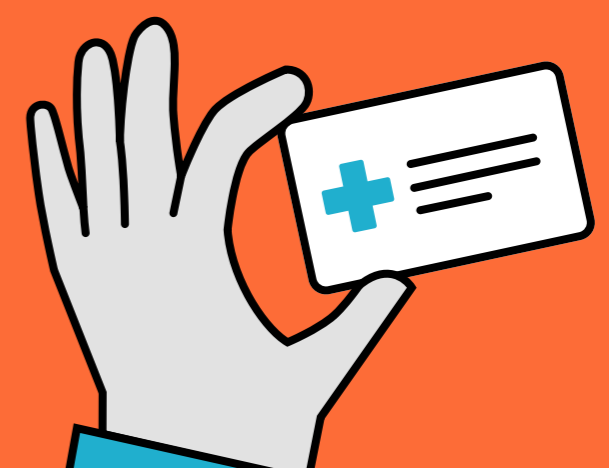
## 4 in 5 bookings

were made using commercial insurance.



# Staying in-network for mental health

Many people often think they have to go out-of-network and shell out big bucks to see mental health providers. However, Zocdoc makes it easy to find in-network providers. In fact, 89% of patients on Zocdoc booked mental health appointments with in-network insurance, while 6% were out-of-network and 5% were self-pay.



# Overall wait times

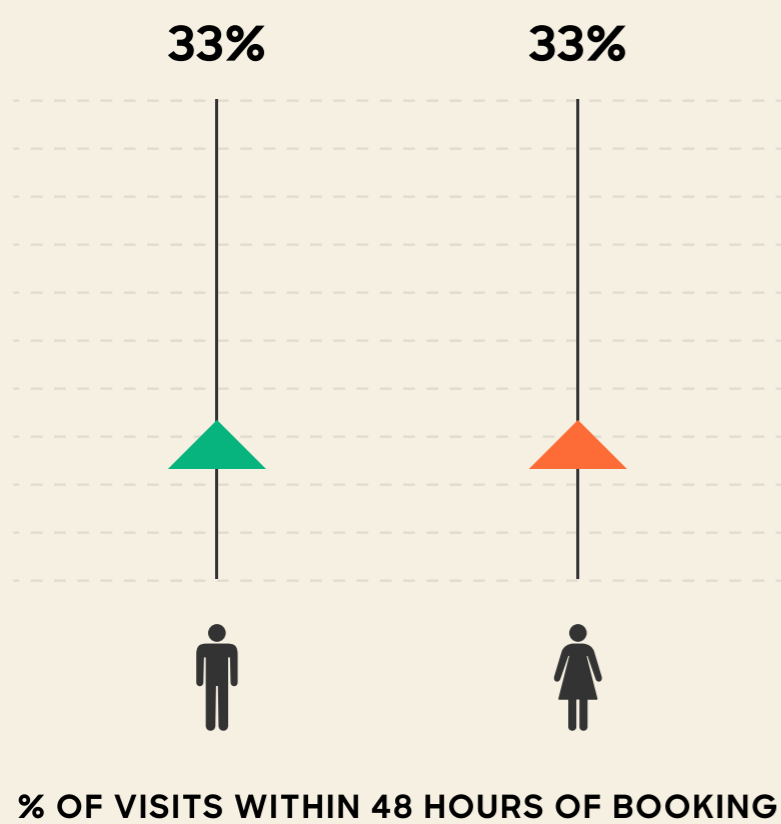
Speed to care is one of the most important factors for patients. When booking care in America, the average wait time to see a physician is 26 days. This is up from 24.1 days in 2017, and 20.9 days in 2004\*. For certain specialties, the average wait time can be even longer.

On Zocdoc, nearly 1 in 3 appointments took place within 2 days of booking and half of all appointments took place within 4 days, showing a strong preference for near-term appointments. This was consistent with 2023.

DISTRIBUTION OF APPOINTMENTS BASED ON TIME BETWEEN THE BOOKING AND THE VISIT



\*According to AMN/Merritt Hawkins' 2022 Survey of Physician Appointment Wait Times



Preference for near-term bookings held true across all demographics. However:

Baby Boomers and older saw slightly less urgency for same-day visits relative to younger generations.

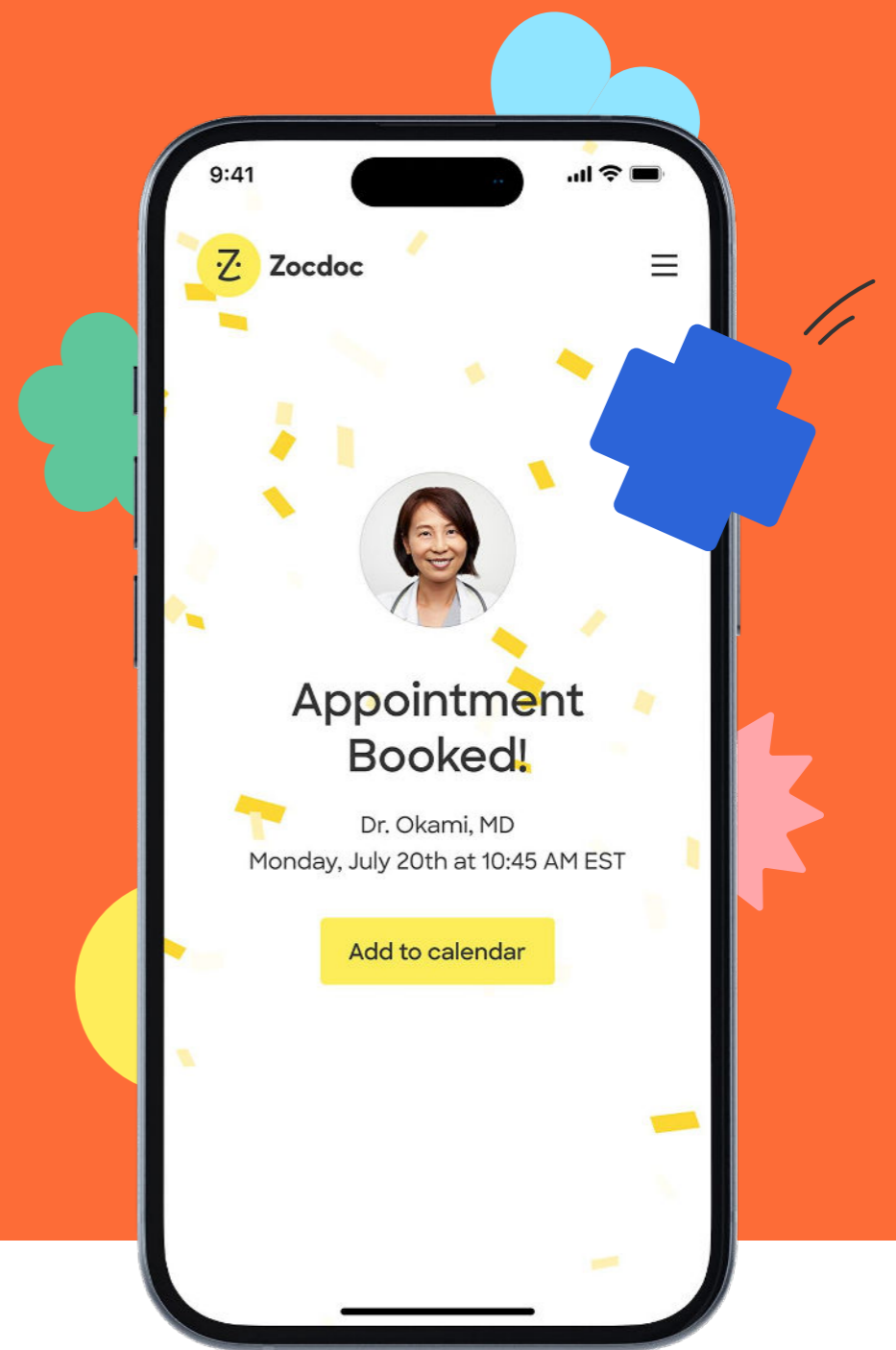
In 2023, men more strongly preferred near-term bookings, with 35% happening within 48 hours vs. 29% for women. **This changed in 2024 to be more equal**, with both a third of women and men booking appointments occurring within 48 hours.

# Specialty-specific wait times

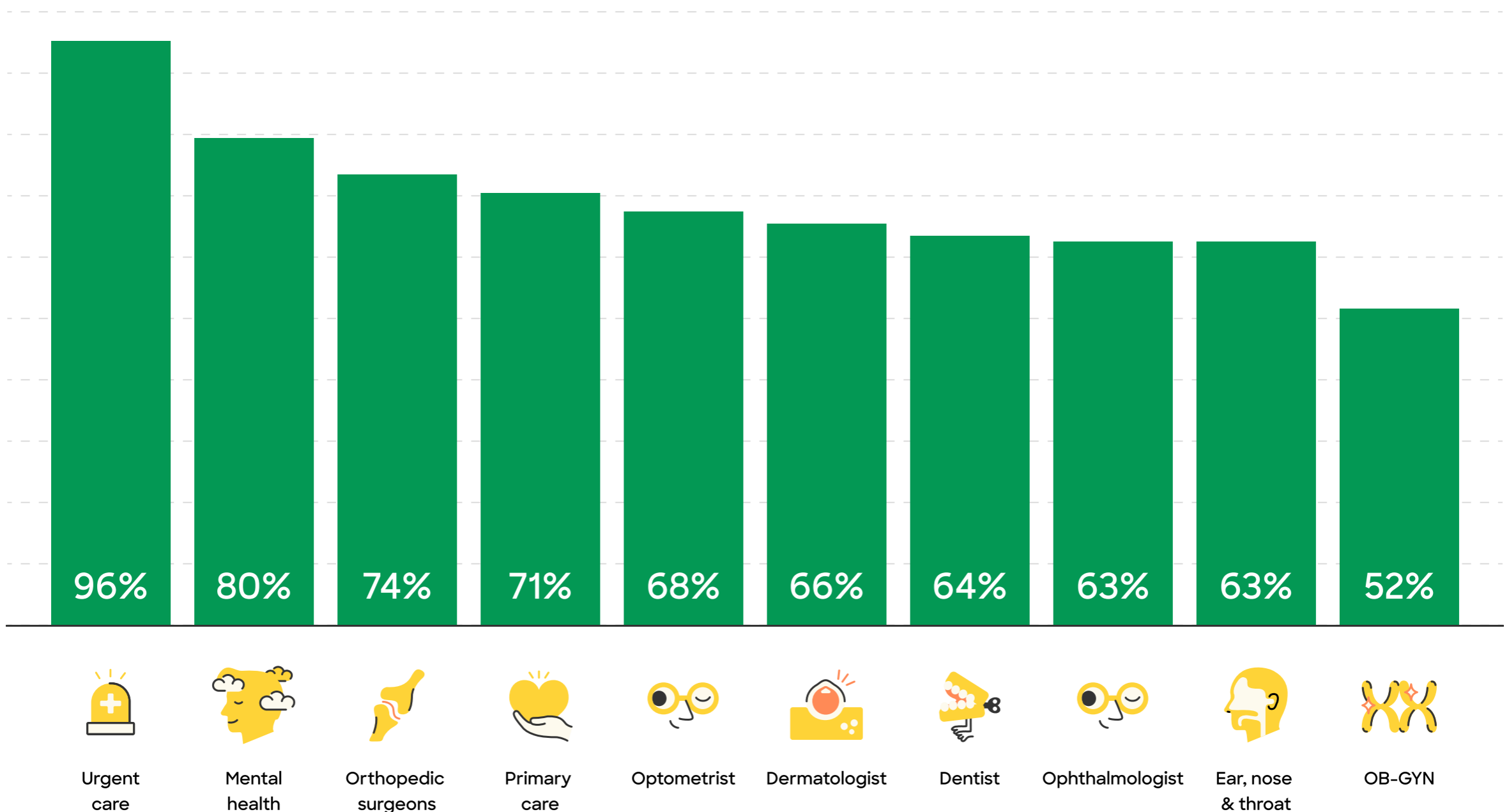
Patients want quick access to care, but many specialties have long wait times. For example, the average wait to see a dermatologist is over 30 days\*.

Zocdoc helps millions of patients get timely care. -80% see urgent care providers within 24 hours and over 50% see orthopedic surgeons within 4 days.

\*According to AMN/Merritt Hawkins' 2022 Survey of Physician Appointment Wait Times



## % of appointments that occur within 8 days of booking, by specialty



# Preferences

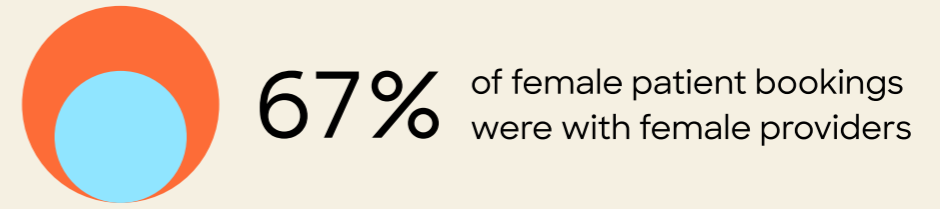
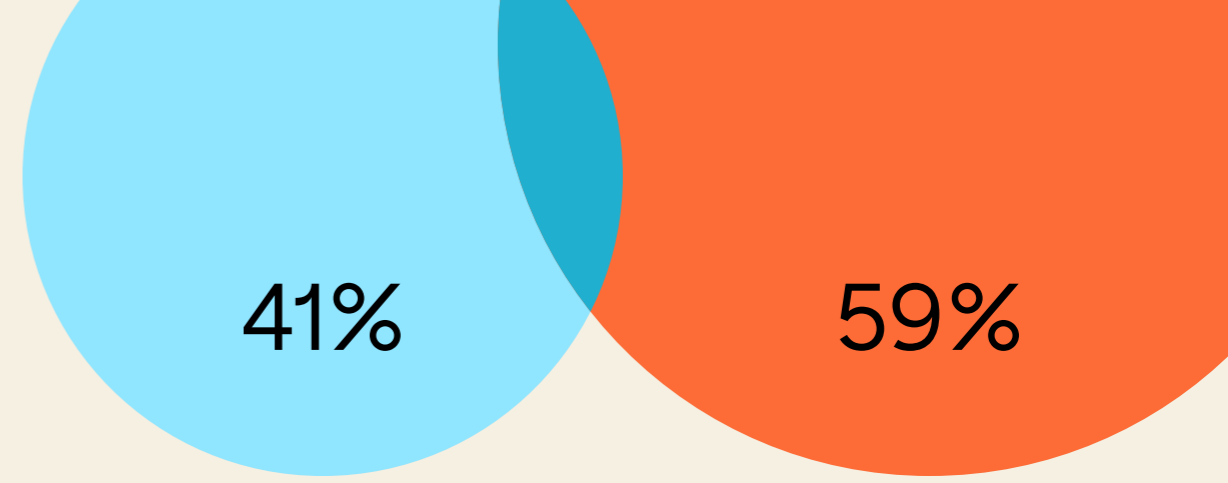
## Gender of provider

On Zocdoc's marketplace, 64% of participating providers identify as female and 36% identify as male, closely mirroring Zocdoc's patient demographics.

Overall, 59% of bookings were made with female providers and 41% of bookings were made with male providers.

67% of female patient bookings were with female providers, up slightly from last year (65%).

Notably, fewer male patients booked with male providers. In 2024, 56% of male patient bookings were with male providers vs. 59% in 2023.



## Preferences shift as patients age.

Younger female patients overwhelmingly prefer female providers. 73% of bookings for Gen Z women were with female providers, which was similar to last year, while 53% of Gen Z men saw male providers, a small dip from last year.

However, as patients age, their preference for male providers increases.

### Female patient

PATIENT AGE	% MALE PROVIDER BKGS
18 - 26	27%
27 - 42	32%
43 - 58	40%
59 - 68	44%
69+	50%

### Male patient

PATIENT AGE	% MALE PROVIDER BKGS
18 - 26	53%
27 - 42	57%
43 - 58	59%
59 - 68	61%
69+	63%

Certain specialties received a disproportionate amount of bookings based on the gender of the provider.

**Female** ob-gyns, gastroenterologists, and cardiologists received more bookings on average than their male colleagues.

- +60%** Ob-gyns
- +35%** Gastroenterologists
- +16%** Cardiologists

**Male** ENTs, urologists, and orthopedic surgeons received more bookings on average than their female colleagues.

- +60%** Orthopedic surgeons
- +50%** Urologists
- +23%** ENTs

Similar to 2023, **male mental health professionals** received an average of 38% more bookings than female providers. This held true in 2024 even though there are roughly 4x the number of female mental health professionals on Zocdoc than male, and 2 in 3 mental health bookings are made for female patients.

- +38%** Mental health professionals



## More photos, more bookings

Similar to 2023, providers with one to three office photos received on average 2.8x as many bookings vs. providers with no office photos.

However, we saw that in 2024, more photos translated to even more bookings. Providers with four or more office photos received 5.8x as many bookings (up from 4.8x last year).



## Speak more languages, see more bookings

Providers who listed two languages on their profile got nearly 2x as many bookings, and providers who listed three or more languages got 3.5x as many bookings (up from 3x in 2023).

Above three languages\*, for every additional language a provider listed, they received another 20% more bookings.

\*Up to 6 languages

## More stars, more success

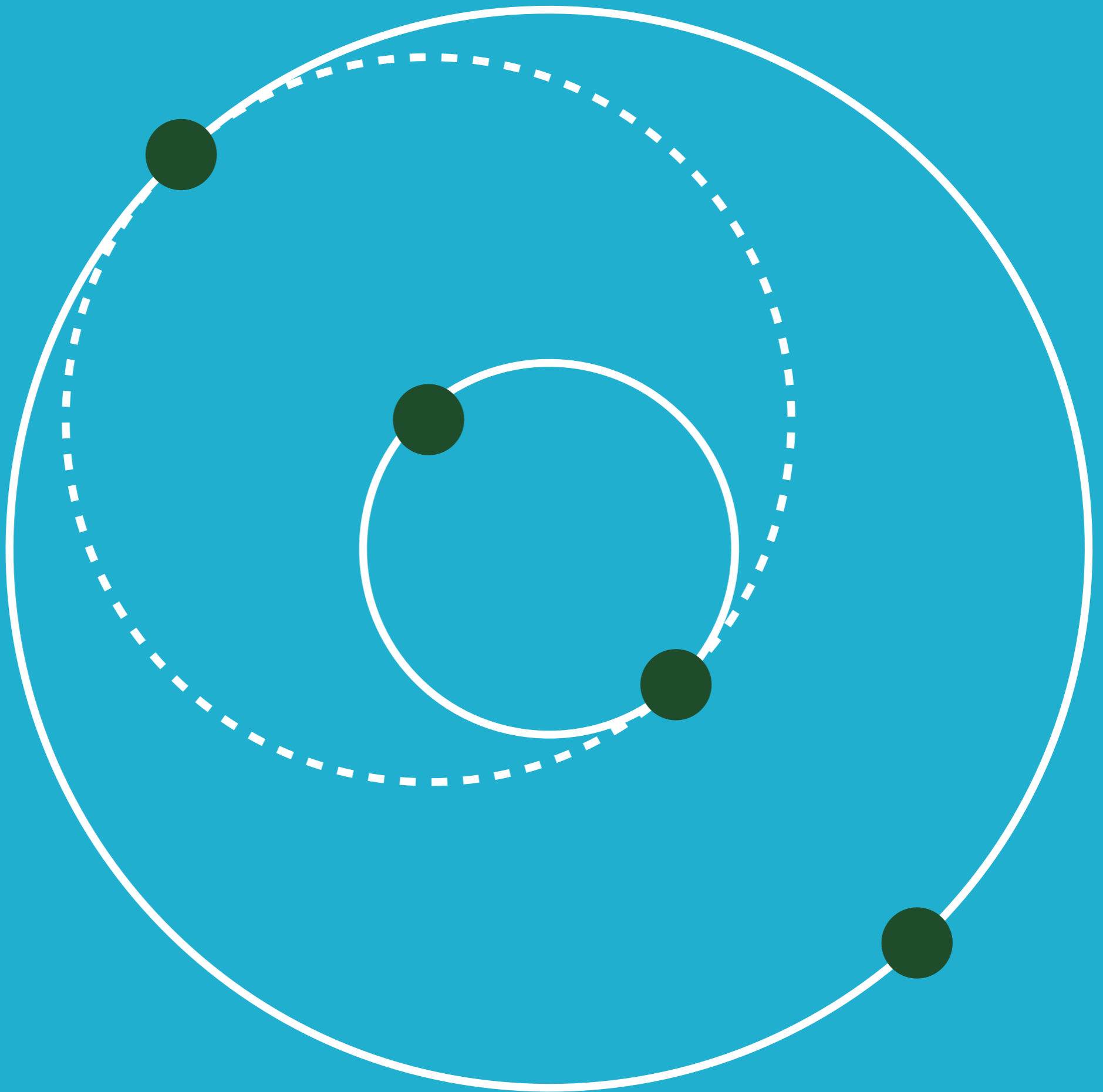
Reviews are important for signaling trust, and bookings increase exponentially for providers who have more reviews.

Providers with more than 50 reviews received 10x more bookings relative to providers with one to nine reviews. Providers with 100+ reviews received 27x more bookings relative to providers with one to nine reviews.



SECTION 3

# Why are patients seeking care?



# Top visit reasons booked in 2024

Preventive health and skin health topped the bookings charts in 2024. Mental health and dental health care also rounded out the top 10.






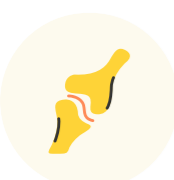




Hyperactive Disorder (ADD / ADHD) moved up to the 5th spot from 9th in 2023, while routine eye exams made the top 10 for the first time this year.



01. Annual Physical	—
02. Annual Pap Smear / GYN Exam	—
03. Dermatology Consultation	↑
04. Illness	↓
05. Hyperactive Disorder	↑
06. Anxiety	↑
07. Dental Cleaning	↓
08. Routine Eye Exam	↑
09. Psychiatry Consultation	↓
10. Dental Consultation	↓

# Top-growing specialty groups in 2024

Urgent care, dermatology, and mental health providers saw the strongest YoY bookings growth.

-  Urgent care
-  Dermatology
-  Psychiatry
-  Allergy
-  Psychology
-  Orthopedics
-  Optometry
-  Dental
-  Ophthalmology
-  Gastroenterology

# Top specialists booked in 2024

The 10 most booked specialists in 2024 remained the same as last year, with primary care doctors receiving the highest number of bookings. Patients prioritized foundational health needs, addressing essential areas of physical, mental, and preventive care.

01. Primary care doctor

---

02. Dermatologist

---

03. Ob-gyn

---

04. Dentist

---

05. Psychiatrist

---

06. Psychologist

---

07. Optometrist

---

08. Podiatrist

---

09. Orthopedic surgeon

---

10. Chiropractor

# Top-growing visit reasons for men and women in 2024

Cold symptoms, eyelid issues, and dental pain were among the top 10 visit reasons with the highest growth in bookings for both men and women.



## Top 10 Growing Visit Reasons for Men (YoY)

01. Cold	<b>209%</b>
02. Therapy	<b>161%</b>
03. Eyelid Problem	<b>135%</b>
04. Dental Pain	<b>119%</b>
05. Urgent Care Consultation	<b>106%</b>
06. Diabetes Consultation	<b>88%</b>
07. Physical Therapy	<b>86%</b>
08. Dry/Itchy Skin	<b>80%</b>
09. Cracked Tooth Repair	<b>77%</b>
10. Chest Pain	<b>77%</b>



## Top 10 Growing Visit Reasons for Women (YoY)

01. Anti-Aging Treatment	<b>195%</b>
02. Cold	<b>192%</b>
03. Gum Inflammation / Gingivitis	<b>118%</b>
04. Eyelid Problem	<b>114%</b>
05. Adult Sick Visit	<b>106%</b>
06. Dental Pain	<b>100%</b>
07. Psoriasis	<b>100%</b>
08. Gastrointestinal Problem	<b>86%</b>
09. Nausea and Vomiting	<b>79%</b>
10. Hypothyroidism/Underactive Thyroid	<b>78%</b>

# Social media-cine trends

Throughout the year, we've followed social media healthcare trends, and kept an eye on how these trends may have impacted patient behavior and Zocdoc bookings in 2024.

**Zocdoc**

## Veneers

**INCREASE IN VENEER APPOINTMENT BOOKINGS**

- +16%
- +15%

Patients showed a particular interest in veneer appointments in 2024. Veneers have been on the rise among celebrities in recent years.

**Zocdoc**

## GLP-1s

Patients booked significantly more semaglutide consultations in 2024 than they did in 2023. This may be due to increasing access and availability for drugs like Ozempic and Wegovy, coupled with rising awareness of these types of weight loss drugs.

- +71% MEN** Increase in semaglutide consultation bookings
- +50% WOMEN** Increase in semaglutide consultation bookings

**Zocdoc**

## “Sleepy girl mocktail”

- +26%
- +30%

Increase in sleep medicine specialist bookings

Patients, especially women, increasingly sought sleep consultations this year. This may be due to the fact that sleepy girl mocktails were trending on TikTok for a few months.

**Zocdoc**

## Mewing

- +87%
- +71%

**INCREASE IN JAW PAIN BOOKINGS**

Patients booked significantly more appointments this year for visit reasons related to jaw pain. This may be due to the potential side effects of mewing, a TikTok trend on how to manually shape your jawline.

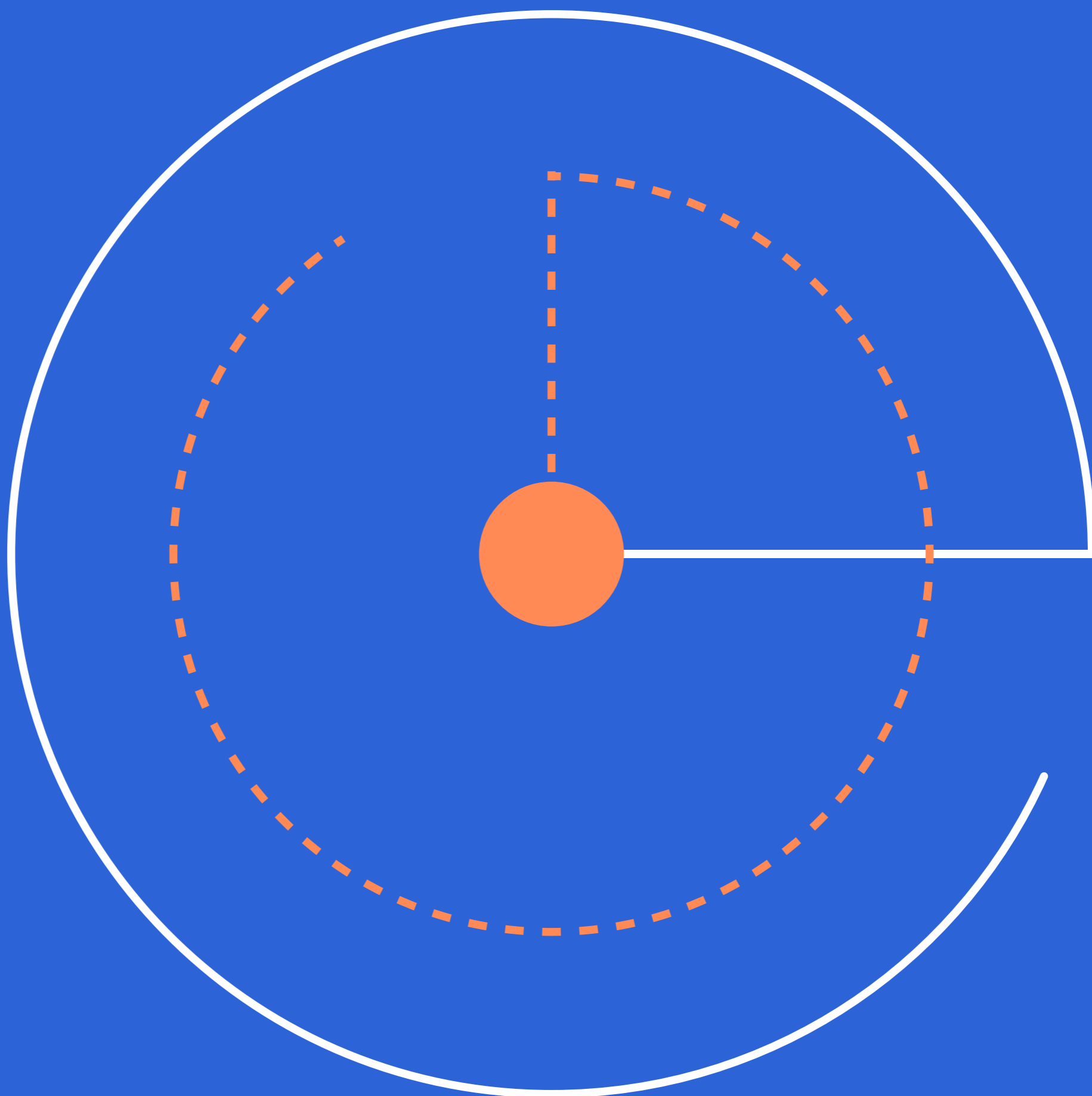
**@blue\_light\_therapy**

## Blue light therapy

Women overwhelmingly booked blue light therapy visits this year, which can be used to treat skin conditions such as acne and sun spots, as well as cold sores and depression.

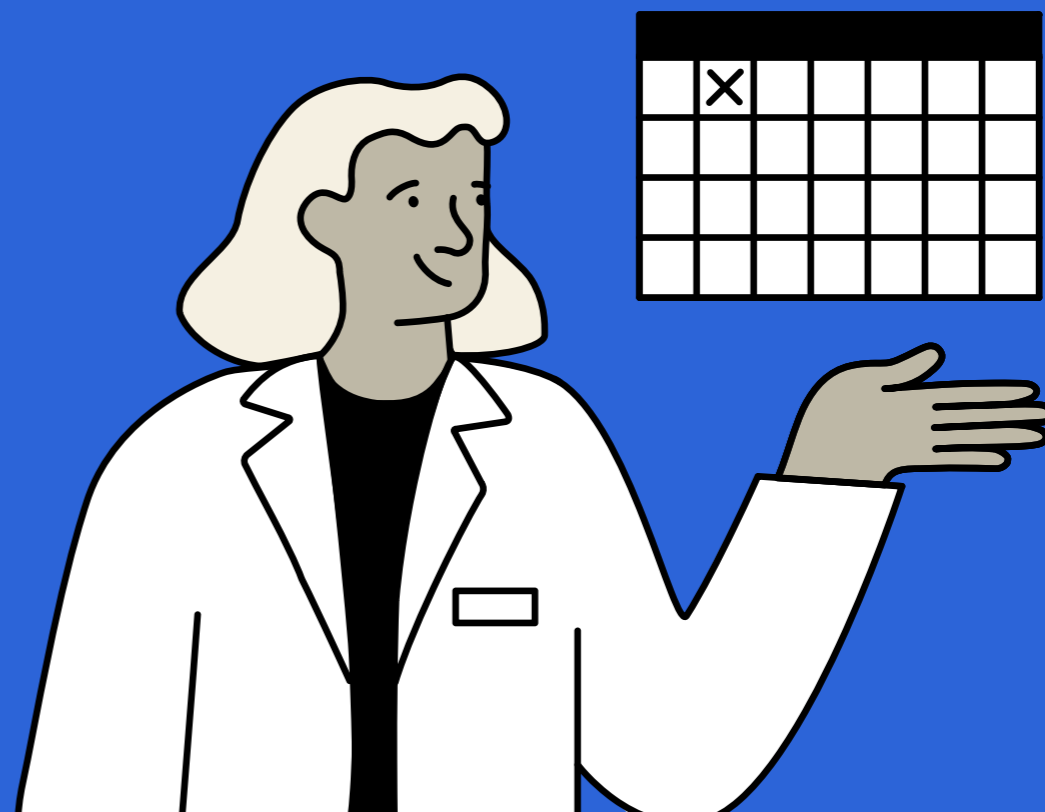
- +200%** Increase in blue light therapy bookings for women

# When do patients want to see the doctor?



## Busiest booking day of 2024 Tuesday, January 2

Patients booked 35% more appointments on January 2, the first non-holiday weekday of the New Year, than the average number of bookings made on Tuesdays in 2024.



### Busiest appointment day of 2024 Monday, September 16

This was the day of the year with the most appointments, with **16% more appointments** scheduled for this day vs. the average Monday in 2024. In comparison, January 13th was the busiest day in 2023, with 13% more appointments.

+16%

### Least busy appointment day of 2024 Monday, January 1

New Year's Day had nearly **94% fewer appointments** than the average Monday in 2024. Thursday, July 4th was the second least busy appointment day.

-94%

### Busiest appointment week of 2024 The week of September 9

This was the week of the year with the most appointments, with **10% more appointments** scheduled for this week vs. the average week in 2024. In comparison, the week of January 9 was the busiest in 2023, with 10% more appointments.

+10%

### Least busy appointment week of 2024 The week of January 1

The first week of the new year saw a decrease in appointments, with many people likely still on vacation. There were **51% fewer appointments the week of January 1** compared to the average week in 2024. This changed from 2023, when the week of July 4th was the least busy.

-51%

### Busiest appointment month of 2024 August

August was the top month overall for appointments, with **7% more appointments** scheduled vs. the average month. In 2023, March was the busiest, with 7% more appointments vs. the average month.

+7%

### Least busy appointment month of 2024 January

There were **14% fewer appointments in January** than the average month in 2024. Last year, April, September, and February were the least busy, which could be due to when the holidays fell and shortness of month relative to 31-day months.

-14%

# 'Tis the season for...

## Checking in with your therapist

You might think stress around the holidays would mean more appointments with mental health providers. As it turns out, October through December were the least busy, with patients booking 19% more mental health appointments in August vs. the average month.

## Seeing your dermatologist

Summer skincare (when more skin is typically exposed to the sun) was top of mind for patients in 2024. Patients booked 14% and 12% more dermatology appointments in July and August respectively vs. the average month.

## Annual health check-ups

Summer was also the busiest time of year for primary care doctors, as patients booked visits for annual physicals and vaccinations. July and August both saw 12% more appointments in 2024 vs. the average month. Even for those not heading back to school, the late summer months can bring a focus on getting back on track with health routines after travel or time off work.



# After-hours booking\*

Patients want to be able to book 24/7 when it's convenient for them. Nearly half of all appointments were booked after hours, when doctors' offices are typically closed.

\*After-hours bookings: 5pm - 9am local time



42%  
Booked when closed

58%  
Booked when open

The top 5 specialties booked after-hours:

- 01 Mental health
- 02 Urgent care
- 03 Chiropractor
- 04 Dermatology
- 05 Primary care

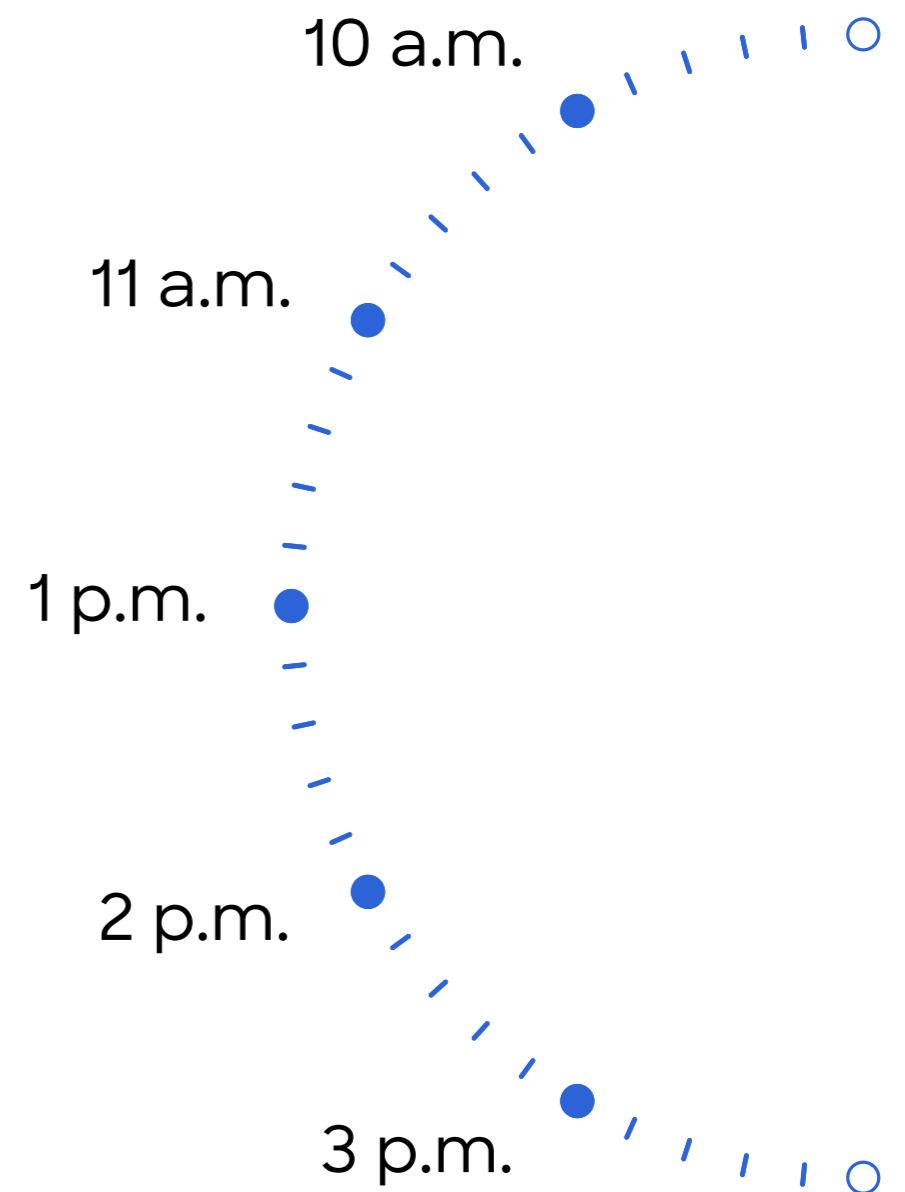
## Most popular time slots

Overall, 11 a.m. was the most popular time of day for an appointment, followed closely by 2 p.m. and 3 p.m., then 10 a.m. and 1 p.m.

Female bookers preferred morning appointments, specifically 11 a.m., while male bookers preferred the afternoon (1 p.m.).

## Most popular appointment days

Mondays (and earlier in the week) were the most popular for an appointment, with popularity dropping off on Friday and into the weekend.



# Where are they seeking care?



# Virtual vs. In-Person

Virtual visits made up 12% of all appointments booked in 2024 (down from 18% in 2023), a number heavily skewed by mental health bookings, which are primarily virtual.

Excluding mental health, only 5% of bookings on Zocdoc were for virtual visits (down from 8% in 2023).

12%

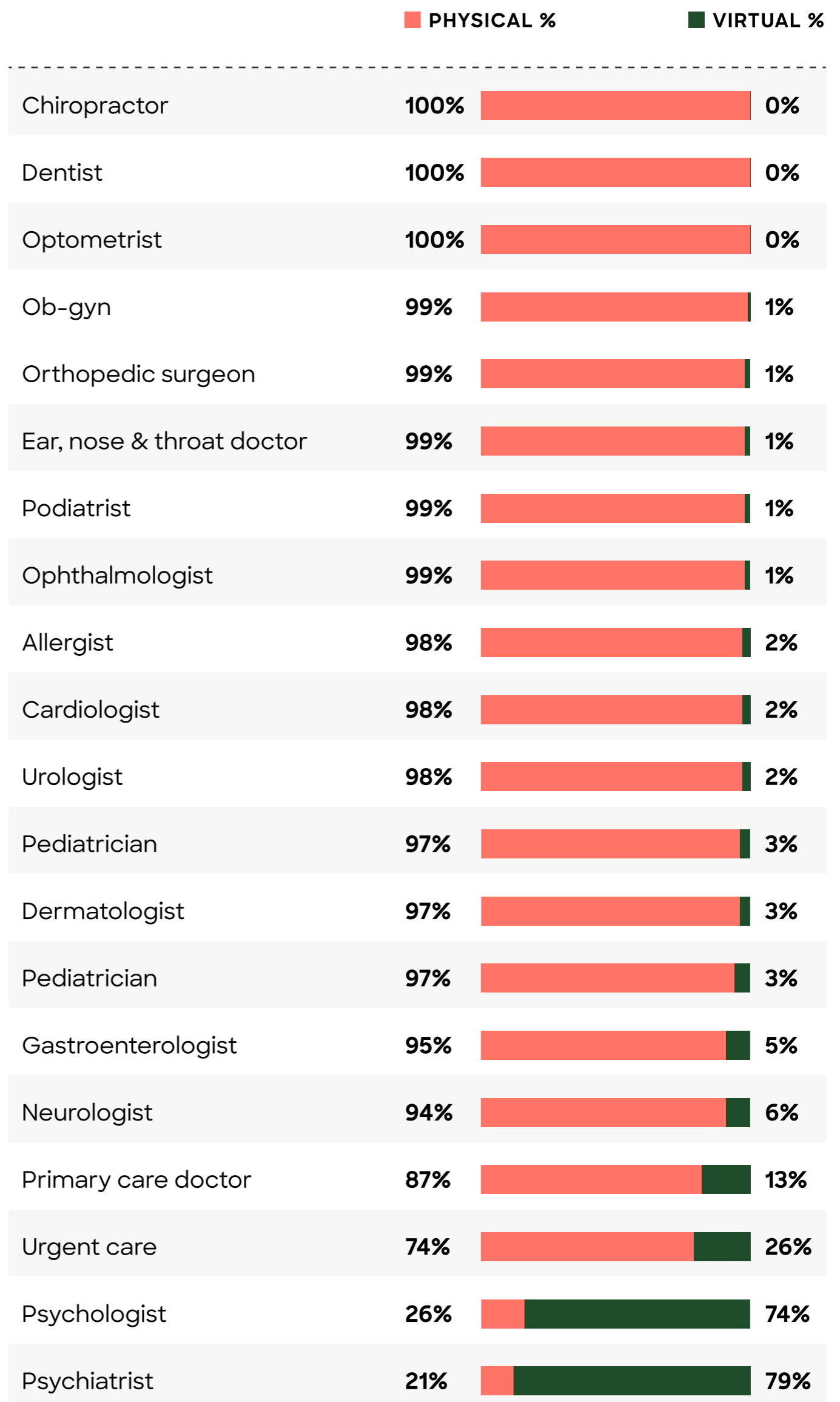
Total virtual visits

5%

Virtual visits, excluding mental health

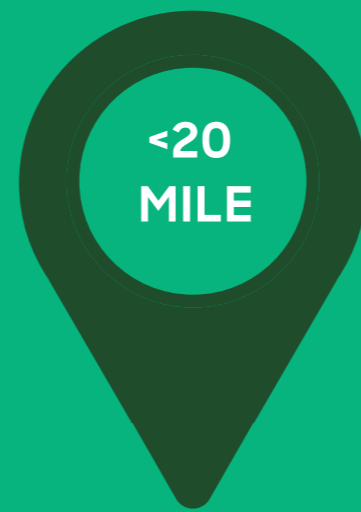
Patients strongly preferred in-person care for nearly all specialties, with the exception of mental health.

Compared to 2023, patients booked more virtual visits for mental health in 2024. Urgent care patients also booked slightly more virtual visits (26% in 2024 vs. 21% in 2023). In-person visits increased this year slightly for primary care doctors, neurologists, and pediatricians.

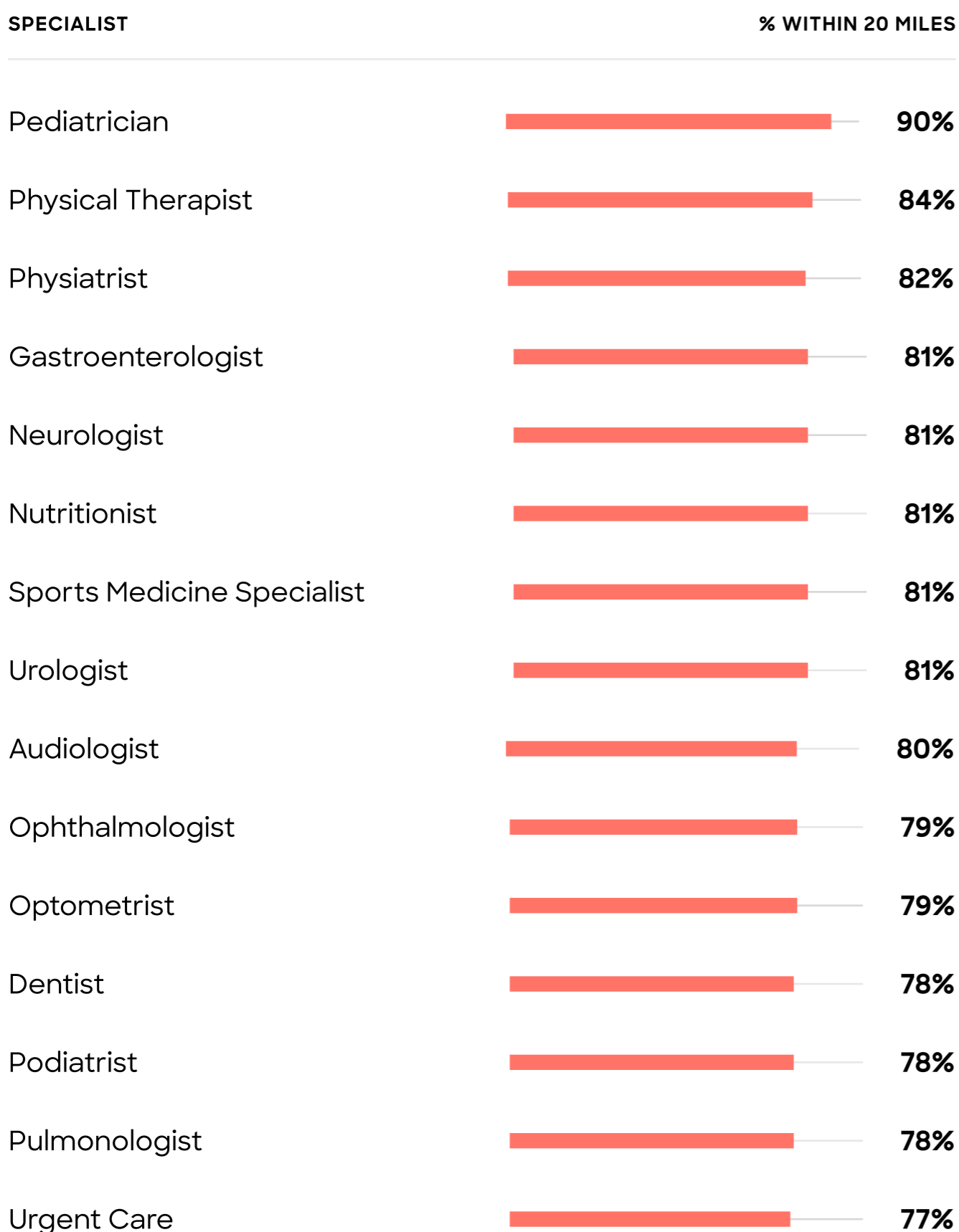


# Patients prefer to stay close to home

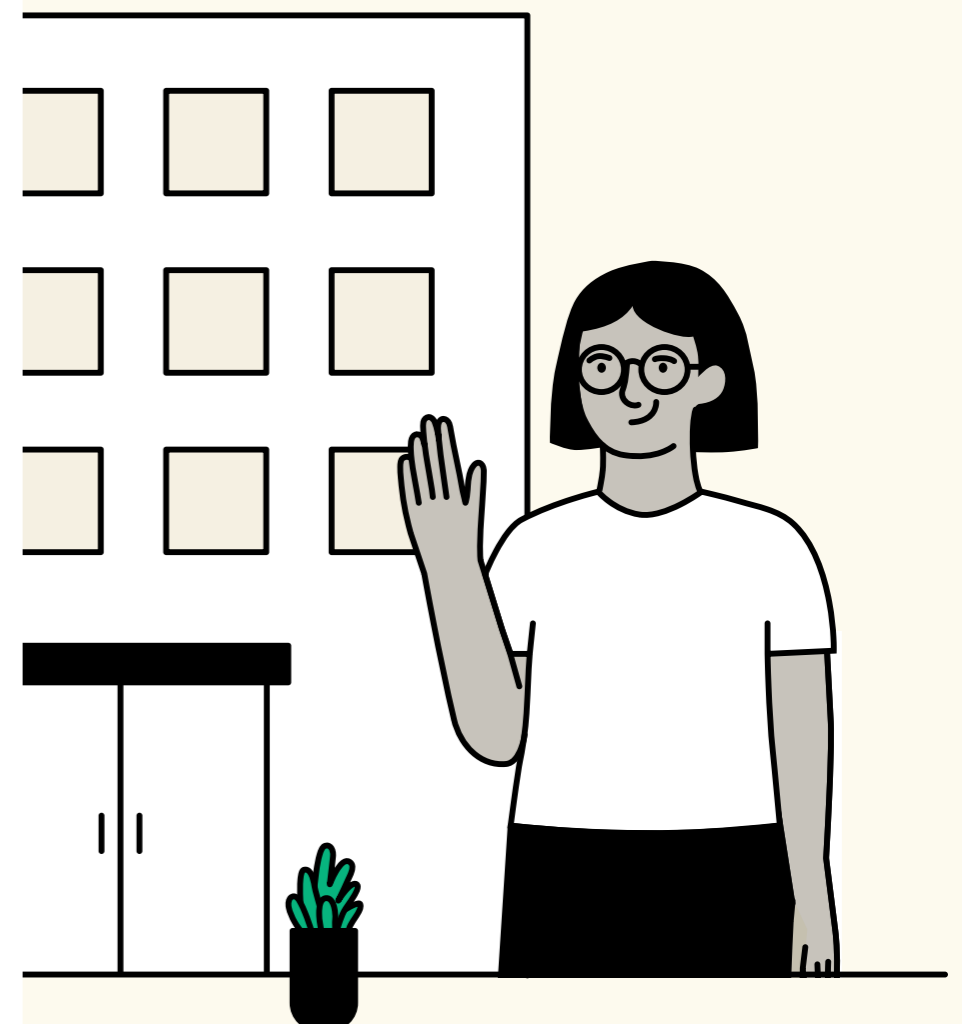
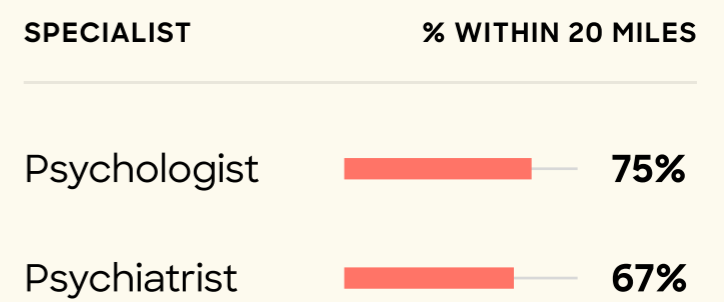
Nearly 4 in 5 physical appointments were within 20 miles. Roughly half of all virtual appointments took place within 20 miles of the patient, too - indicating patients' preference for provider proximity even when scheduling virtual care. This was consistent with 2023.



For in-person appointments, proximity was even more important for more “hands-on” specialties such as physical therapists and sports medicine specialists.



As such, proximity of mental health providers mattered much less than other specialties, given the nature of those interactions



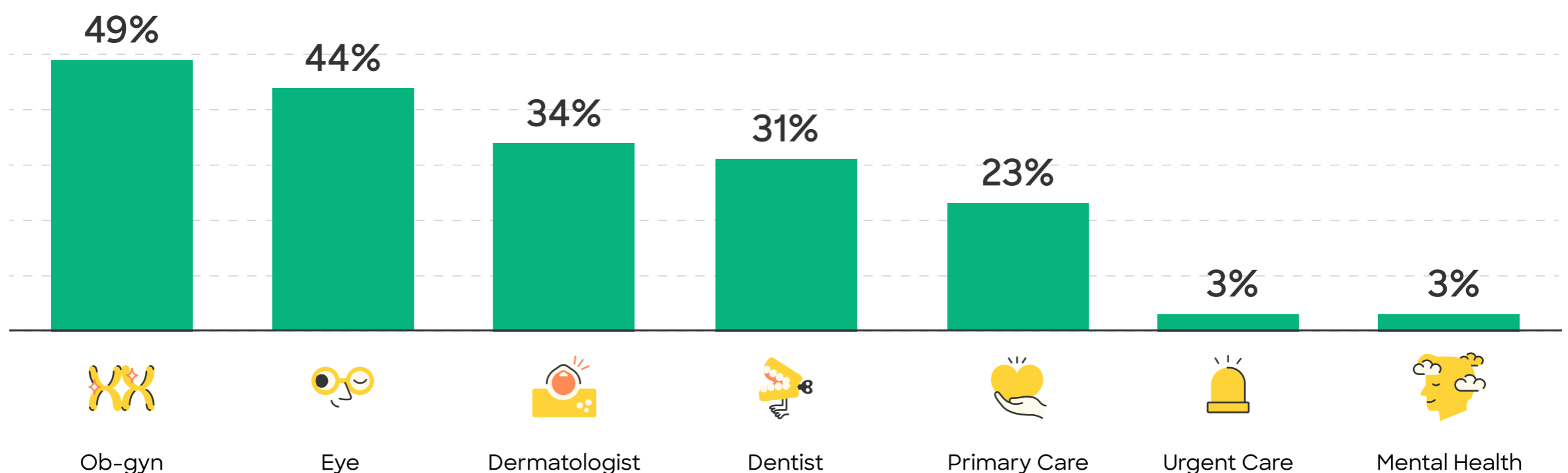


## The importance of a hybrid approach

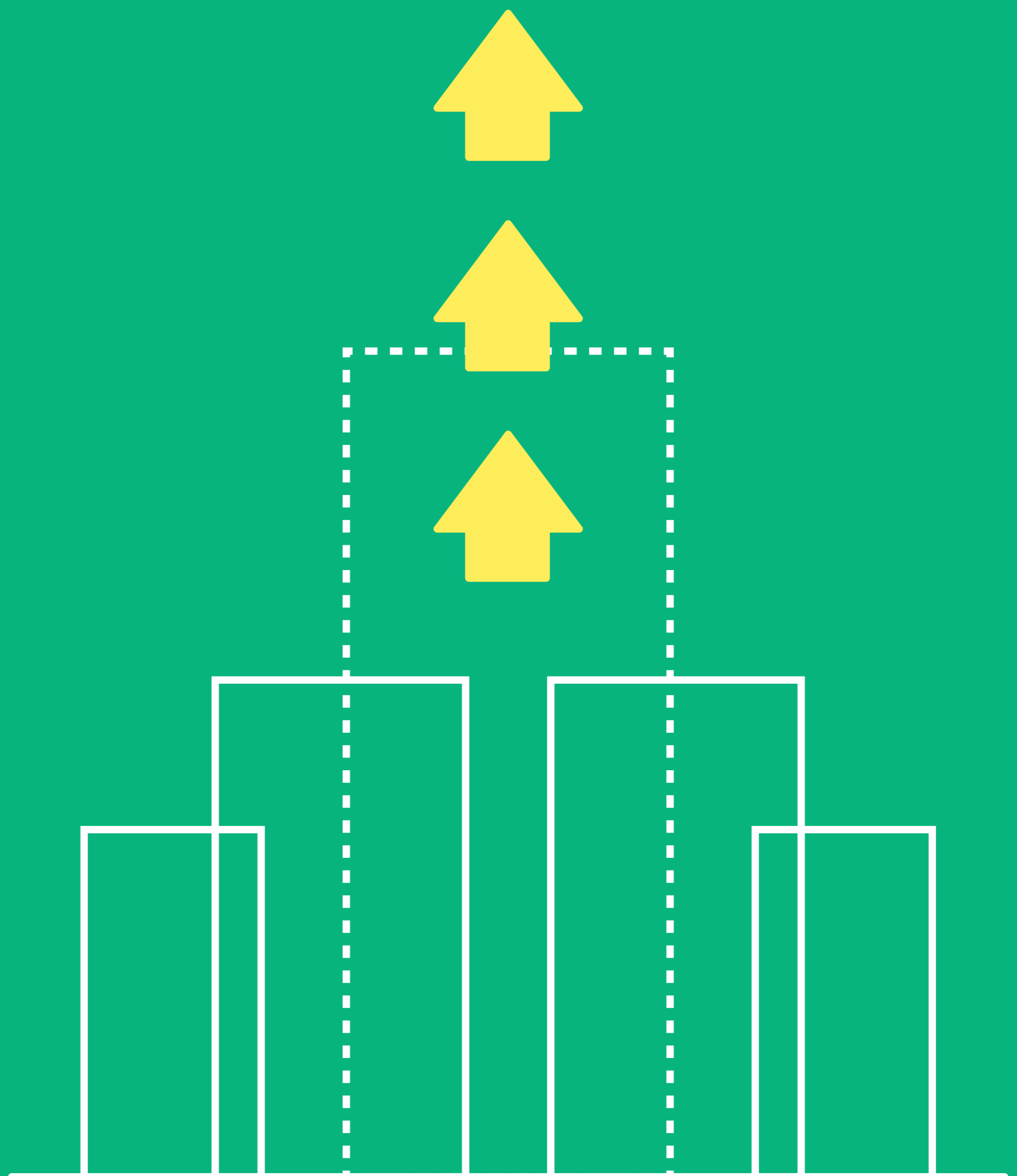
Patients know that healthcare is inherently physical, and they value establishing a virtual relationship with a provider that can continue in person, and vice versa. With the exception of mental health, providers who offered both virtual and in-person visits received 48% more bookings than those that offered in-person only and 224% more than virtual-only providers.

Outside of mental health, when booking a first visit virtually, nearly 1 in 5 patients (17%) booked an in-person follow-up. However, this online-offline continuity of care differed by specialty.

PERCENTAGE OF VIRTUAL VISITS WITH IN-PERSON FOLLOW UP



# 2024 Patient Empowerment Index



The Zocdoc Patient Empowerment Index is an annual report that represents three core elements of patients' healthcare experience:

1. Access to care
2. Comfort with providers
3. Control over their healthcare

Respondents were assigned scores based on their answers to the following three questions.

These scores were then averaged to find the Patient Empowerment Index number, ranging from -80 to 120.

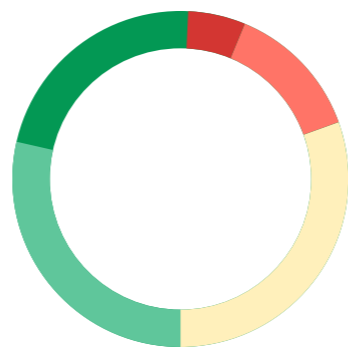
## 2024 Patient Empowerment Index:

# 55.8

▼ Down 3.1 YoY

### Methodology:

Zocdoc commissioned Censuswide to collect this data via an online survey of 1,000 U.S. consumers aged 18 and up. The survey was fielded October 14-16, 2024. Censuswide abides by and employs members of the Market Research Society, which is based on the ESOMAR principles. The confidence interval is approximately +/-3.1%.



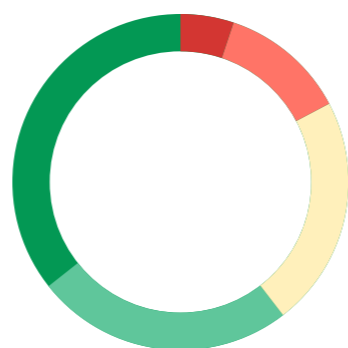
How much control, if any, do you feel you have over your own healthcare?

■ No control at all: 5.5% ■ A little control: 14.1% ■ Moderate control: 31.0% ■ Much control: 27.4% ■ Full control: 22.0%

Respondents in 2024 report that they mostly have control over their healthcare (80.4%). However, nearly one in five patients say they have little to no control.

This feeling is most common among 25-34 year-olds, with 28.5% feeling like they have little to no control over their healthcare.

Compared to 2023, feelings of control are flat (▼ down 0.6%).



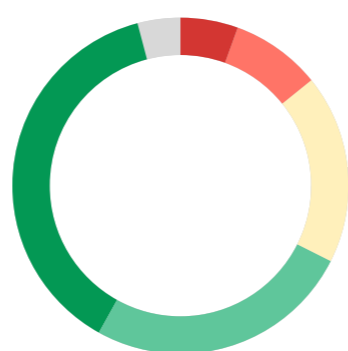
How easy or difficult is it for you to access healthcare?

■ Very difficult: 5.3% ■ Somewhat difficult: 11.9% ■ Neither: 22.6% ■ Somewhat easy: 24.4% ■ Very easy: 35.8%

Over 17% of Americans surveyed found accessing healthcare to be difficult.

While 60.2% say it's easy, this is a drop from last year, in which 66.6% of people found accessing healthcare easy (▼ down 6.4%).

Interestingly, responses indicate that difficulty decreases as age increases. Patients who are 18-24 years old are the most likely to find accessing healthcare difficult (25.62%), compared to just 9.1% of patients 55+.



How comfortable or uncomfortable do you feel with your doctor(s), in terms of overall relationship, communication and trust?

■ Very uncomfortable: 5.6% ■ Somewhat uncomfortable: 8.1% ■ Neither: 18.7%  
 ■ Somewhat comfortable: 25.6% ■ Very comfortable: 38% ■ N/A: 4.0%

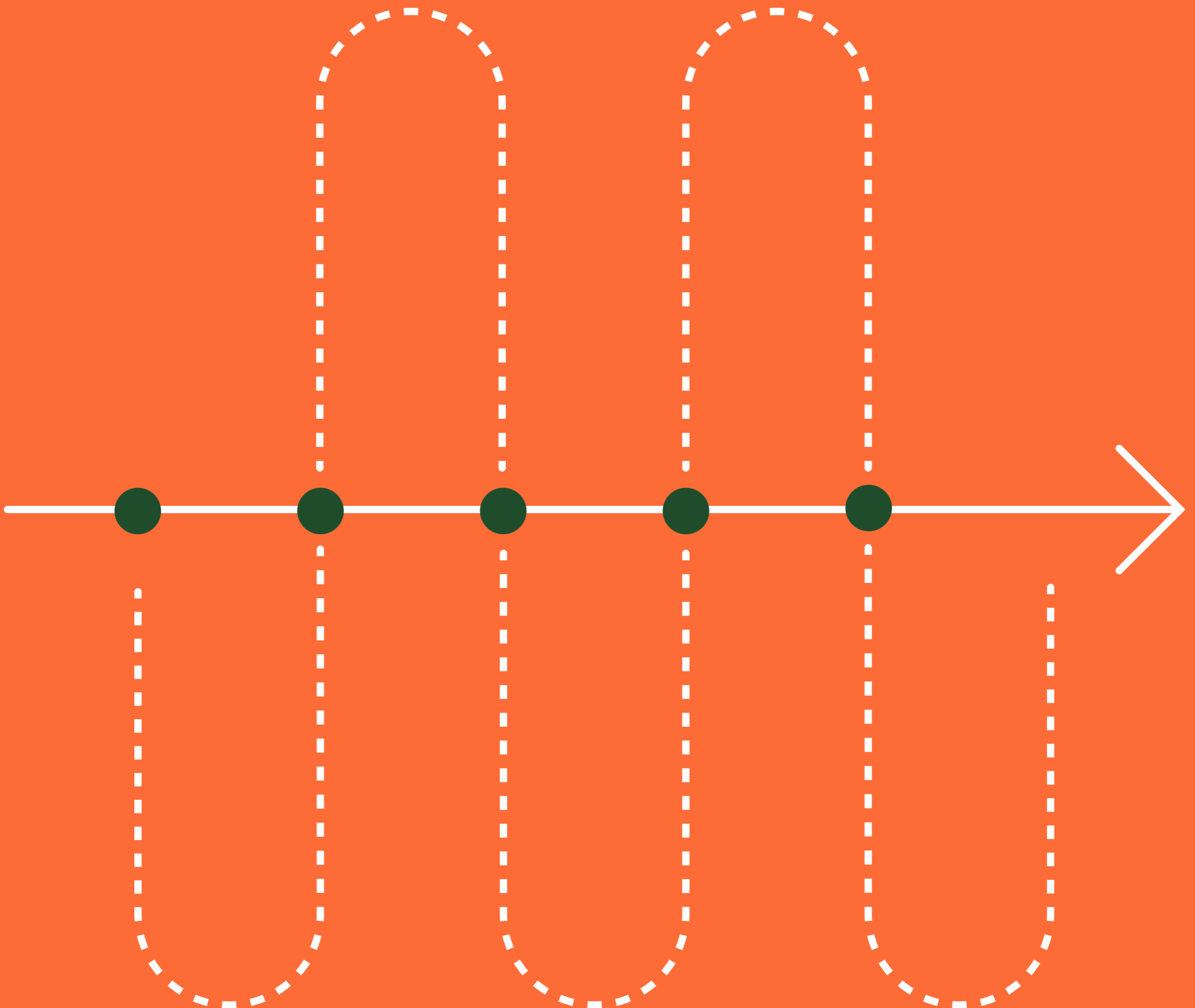
Most patients (63.6%) are somewhat or very comfortable with their doctors. This marks a decline (▼ down 5.8%) compared to 2023.

Again, we see that comfort increases with age. 18-24 year-old patients are the least likely to be comfortable (51.2%), while those aged 55+ are the most likely to be comfortable (74.9%).

SECTION 7

# 2025 Predictions

From Zocdoc founder &  
CEO Oliver Kharraz, MD





## Zocdoc founder and CEO, Oliver Kharraz, MD

Shares three patient predictions and three industry predictions for the year ahead.

### **1. Patients will become more comfortable interacting with AI solutions, particularly for administrative healthcare tasks.**

While the primary focus on AI in healthcare has been on provider-facing clinical use cases (e.g. AI scribes), 2025 will be the year when AI begins to have patient-facing benefits. This will start with streamlining administrative tasks surrounding their interactions with healthcare providers (e.g. coverage verification, scheduling, referral or prior authorization requests, prescription refills, etc.). While interacting with AI to fulfill these needs may feel foreign at first, as with all novel technologies, users will migrate to the solution that delivers a superior experience and greater convenience. 2025 will be the year patients begin to gain comfort with AI assistants as part of the way they interface with healthcare, and this comfort will grow as they experience AI's value and utility firsthand.

### **2. Patients will continue to experiment with cash pay healthcare services.**

Given the persisting rise in both healthcare costs and adoption of high-deductible plans, Americans will increasingly consider care services that offer guaranteed, upfront, transparent pricing. This will particularly accelerate when it comes to prescriptions and more novel longevity-focused diagnostics, including bundled services like labs and MRIs. While patients have historically been conditioned to stay in-network, they still have some uncertainty when it comes to their out-of-pocket costs. At the same time, they are starting to view healthcare more as a consumer-driven category, and as that happens, we will see more niche cash pay services take off.

### **3. Increased availability and decreased prices for commercial GLP-1s will lead to greater adoption.**

With supply bottlenecks decreasing, there will be increased competition among commercial GLP-1s with similar effectiveness profiles. This will bring down high list prices for these drugs, making them more accessible to Americans who have been unable to afford the high out-of-pocket costs. At the same time, compounders—which served as a Band-Aid during a time of scarcity—will be phased out as consumers opt for less expensive, more reliable FDA-approved versions that will become more broadly accessible.

# How the Industry Will Shift in 2025



## **1. We will see scale deployment of AI solutions that reduce the administrative burden for healthcare providers.**

Again, much of the focus on AI in healthcare has been on clinical use cases that require supervision and, as such, don't add to increasing capacity. But 2025 will be a breakout year for AI solutions that can function efficiently and autonomously to handle non-clinical administrative processes. A prime opportunity is training AI to handle providers' outbound and inbound calls for a variety of administrative needs, streamlining the experience for both sides of the transaction. This is an opportunity to significantly reduce the estimated \$600 billion to \$1 trillion spent in healthcare related to non-clinical administrative tasks, and redirect valuable healthcare workforce resources toward delivering exceptional patient care.

## **2. Amazon will materially restructure its healthcare offerings.**

Tech giants have had a notable lack of traction in healthcare, and Amazon, Apple, Google, and Microsoft have all learned firsthand that this space is not easy to disrupt from the outside in. While most have retrenched, Amazon has persisted.

Despite various pivots, it has not yet been able to show traction in this space. For a company that prizes efficiency, it is untenable to continue to carry hundreds of millions in losses. 2025 will be the year that they determine that they don't have the margins to make healthcare work, and managing healthcare providers is a very different business than managing logistics. We may see a pivot that prioritizes pharmacy—which is more aligned with their core competencies and is more scalable—and divests other care services.

## **3. With a new Administration in place in 2025, there will be a reshuffling of federal healthcare priorities.**

While the new Administration's agenda will become more clear in the first 100 days, we are anticipating an increased focus on consumer-directed health plans, new tactics on information blocking rules, a less stringent regulatory approach to AI, a continued interest in unlocking price transparency and reducing surprising billing, and changes to prior authorization policy. We are also anticipating a regulatory environment that tinkers with requirements of Medicare Advantage plans and could be more favorable to certain types of healthcare M&A.