CHEAT SHEET

Gen Xers and Primary Care

A Guide to Gen Xers’ Primary Care Behaviors and Preferences

Published – April 2020 • 5 min read

Key takeaways

- Have the broadest convenience expectations: like all age groups, Gen Xers expect on-demand primary care access and short wait times. However, they also place a high value on short travel times and weekend hours—more so than other generations.
- Make judgements based on fewer recent interactions: despite visiting a primary care provider (PCP) less often than other generations, this group relies heavily on past experience to guide future care decisions—creating pressure to impress when you do see them.
- Not your prime target for concierge care and special branding: Gen Xers are 20% less willing to pay for premium services than younger age groups, and care least of all the generations—except the Silent generation—about a clinic’s affiliation.
- Are not blindly loyal: though loyalty to primary care providers increases with age, Gen Xers’ Net Promoter Score is still low.

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

Who are they?

Gen Xers are:

- Individuals born between 1965 and 1980.
- 20% of the national population (65 million people).
- Insured through work: nearly two-thirds (62%) of Gen Xers have insurance through their employer and 30% report being on high-deductible health plans (HDHPs). Six percent report being uninsured.
- Generally healthy, though many are managing cardiovascular and behavioral health issues, such as high blood pressure (34%), anxiety (32%), high cholesterol (28%), and depression (26%).
- Often raising children in their home: two in five have children under 18 living in their household full- or part-time.

Data Source

To better understand what Gen Xers—and other generational cohorts—want and need from primary care, we asked more than 3,000 consumers about their health status, care preferences, and recent behaviors in our 2019 Primary Care Consumer Choice Survey. The sample size for Gen X was 577.

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

What are their primary care behaviors?

- Gen Xers are less likely than younger generations to utilize a PCP. Over the 12-month period preceding our survey, 45% never visited a PCP and 30% visited only once.

0 visits	1 visit	2-3 visits	4-5 visits	5+ visits
45%	30%	21%	3%	1%

- Most report having a regular PCP, but nearly one in five use an alternate site of care—such as urgent care or a retail clinic—as their main source of primary care.

Traditional PCP	Urgent care	Concierge care	Retail care	ED	Virtual visit	Different places	Not sure	Don't use
69%	7%	2%	1%	2%	1%	5%	8%	5%

- For their last basic urgent care episode (e.g., fever or sore throat), 41% of Gen Xers sought care outside of a traditional PCP office, compared to 47% of Gen Zers and 50% of millennials.

Traditional PCP (45%)			Alternative care site (41%)					Other (14%)
Normal PCP	Other PCP in clinic	Alternate clinic	Urgent care	Retail clinic	Virtual visit	ED	Kiosk	None/ don't know
35%	4%	6%	27%	3%	2%	8%	1%	14%

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

What are their primary care behaviors?

- Only 2% of Gen Xers used a virtual visit for their last episode of care—the same as respondents 71 and older. However, Gen Xers are as receptive as millennials to the idea of using telehealth for future primary care needs. Twenty-two percent would consider a live virtual visit and 19% would consider an asynchronous visit.

- Gen Xers report choosing care largely based on past experience (51%), but one in five also check their insurance website. They're much less likely than younger generations to consult with family and friends (16%) or use an internet search (13%) for recommendations.

- Only 31% of Gen Xers said they will "definitely" or "most likely" stay with their current PCP for at least the next 12 months, translating to a Net Promoter Score of -24.3. This figure is two times more positive than that of millennials, but still paints a poor picture of patient loyalty and retention.

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

What are their primary care preferences?

- When choosing a new PCP, Gen Xers do not care much about virtual visit capabilities, biometric screening, or patient portals for online scheduling and bill pay—at least not yet. Instead, they're looking for a clinic with a short travel time, weekday evening hours, or the highest patient satisfaction scores.

- Gen Xers care less about clinic affiliation than nearly every other generation. Of the 71% who do care about affiliation, past experience with the hospital or medical group is most likely to influence their care decision. They're ambivalent about insurance company-run clinics and more strongly opposed to the idea of an Apple- or Amazon-owned clinic than are younger generations.

Percentage of respondents ranking each affiliation option as their most and least preferred

	Past experience	Independent clinic	Insurance-run clinic	AMC[1]	Apple or Amazon	Don't care
Most preferred	37%	9%	9%	13%	3%	29%
Least preferred	3%	6%	13%	3%	46%	

- Gen Xers are less tolerant of waiting for an appointment during a mid-acuity care episode like the flu than are Gen Zers or millennials. Only 30% would tolerate a wait of more than one day before seeking care elsewhere.

Wait tolerance for mid-acuity issue

No wait	Up to 5 hours	Up to 1 day	Up to 2 days	Up to 3 days	>3 days
18%	16%	37%	19%	7%	4%

1. Academic medical center.

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

What are their primary care preferences?

- For a low-acuity condition like shoulder pain, Gen Xers were more tolerant of wait times than older generations. However, three in five would leave to get care elsewhere if they could not get an appointment within three days.

Wait tolerance for low-acuity issue

No wait	Up to 1 day	2-3 days	4-7 days	2-3 weeks	>3 weeks
14%	17%	32%	25%	9%	3%

- Sixty percent of Gen Xers would be willing to pay a $200 annual fee for premium clinic services, relative to 75% of millennials and 78% of Gen Zers. Among Gen Xers willing to pay for supplemental offerings, on-demand access guarantees were, unsurprisingly, the most popular feature. However, Gen Xers were also the generation most interested in receiving nutrition and weight counseling services at their primary care clinic.

Premium service offering	Percent willing to pay
Guaranteed same- or next-day appointments	23%
Faster access to specialists	20%
Physician house calls	17%
24/7 virtual access to a doctor	16%
Nutrition/weight loss counseling	12%
Longer visits	10%
Premium customer service	10%
Gym access at clinic	9%
Transportation to/from appointments	8%
Fitness classes at clinic	7%
App with health record, bill pay, scheduling, and messaging functions	7%
Acupuncture	7%
Genetic tests/care customization	6%
Remote monitoring through wearable devices	5%
Meditation/yoga classes at clinic	4%

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

Conversations you should be having.

01 **What are our experiences serving Gen X patients?** Did this data change our understanding of this group? What additional data do we need to collect?

02 **How do Gen Xers fit into our overall strategy?** What percentage of our patients are from this generation? Would an age-segmented primary care strategy meet our current and future market demands?

03 **What messages should we proactively communicate to this cohort?** Are there affiliated sites such as urgent care centers that we should connect patients to when we do not have same-day availability? What kind of behavioral health support can we offer? Do we offer convenience-focused services that this group may not be aware of? How can we ensure this group is receiving necessary preventive care, given that they don't often visit a PCP?

04 **Are there changes or investments we should make to improve convenience, experience, or on-demand access capabilities for this cohort?** Can we do more to coordinate care and foster the seamless care experience Gen Xers value? Do we have staffing and scheduling capacity to accommodate Gen Xers' preference for weekday evening and weekend hours? Are there special services we can offer at low- or no-cost such as weight and nutrition counseling?

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

Related

EXECUTIVE BRIEFING
2019 Updates in Primary Care Consumer Preferences
advisory.com/primarycaresurvey

EXECUTIVE BRIEFING
Consumer Preferences for a Primary Care Clinic
advisory.com/newclinic

EXECUTIVE BRIEFING
Consumer Preferences for Urgent Care
advisory.com/urgentcaresurvey

INFOGRAPHIC
What do Parents Want from Low-Acuity Pediatric Care?
advisory.com/pediatrics

Source: Market Innovation Center Primary Care Consumer Choice Survey 2019.

Market Innovation Center

Project Director

Rebecca Tyrrell, MS

tyrrellr@advisory.com

Research Team

Sharareh Afshani

Emily Heuser

Program Leadership

Alicia Daugherty

655 New York Avenue NW, Washington DC 20001
202-266-5600 | **advisory.com**