CHEAT SHEET

Gen Zers and Primary Care

A Guide to Gen Zers' Primary Care Behaviors and Preferences

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Key takeaways

- Use more primary care than other age groups, but not in a traditional clinic setting: Gen Z is the only generation where the majority use alternative care sites as their main source of primary care.
- Likely to stick with what they know or try first: Gen Zers place a high value on provider familiarity and are also the most likely of all generations to rely on a doctor's recommendation to find care.
- Spread their preferences across more clinic features: Gen Zers do not overwhelmingly favor specific clinic attributes, but instead value a broader array of features than other cohorts.
- Willing to pay extra for special treatment: four in five Gen Zers would pay an annual premium for exclusive clinic services—especially access guarantees and wellness-focused amenities like gym access and fitness classes.

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

Who are they?

Gen Zers are:

- Individuals born between 1997 and 2012 (90 million Americans).
- The most ethnically and racially diverse generation in the U.S.
- Unsure of their insurance coverage: 30% report having insurance through their employer and 6% report being uninsured, but 42% don't know their insurance type. One-third report being on high-deductible health plans (HDHPs).
- Challenged with behavioral health issues: 47% report having anxiety and 33% report having depression.
- Likely to have one chronic physical health condition: 36% of Gen Zers reported having asthma and 9% reported having diabetes.

Data Source

To better understand what Gen Z—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. This report includes responses from 239 Gen Zers who were at least 18 years of age at the time of the survey.

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

What are their primary care behaviors?

- Gen Zers have the highest rate of primary care utilization of all generations. Over the 12-month period preceding our survey, they were the most likely to have visited a primary care provider (PCP) at least once, and the most likely to have visited more than four times.

0 visits	1 visit	2-3 visits	4-5 visits	5+ visits
27%	31%	33%	6%	3%

- Almost half of Gen Zers (47%) use an alternative care site instead of a traditional clinic as their main source of primary care. They are also the most likely to report using concierge care.

Traditional PCP	Urgent care	Concierge care	Retail care	ED	Virtual visit	Different places	Not sure	Don't use
38%	13%	10%	10%	4%	3%	7%	11%	5%

- Gen Zers were more likely than other age cohorts to use an alternative care site instead of a traditional clinic for their most recent basic urgent care episode (e.g., fever or sore throat). Of those alternative sites, a greater percentage of Gen Zers used retail clinics and virtual visits than did older generations.

Traditional PCP (36%)			Alternative care site (47%)					Other (16%)
Normal PCP	Other PCP in clinic	Alternate clinic	Urgent care	Retail clinic	Virtual visit	ED	Kiosk	None/ don't know
19%	7%	10%	20%	10%	9%	8%	0.4%	16%

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

What are their primary care behaviors?

- When deciding where to go for care, Gen Zers—along with millennials—are more likely than older groups to rely on recommendations from friends and family (23%) and online searches (19%). They are also the most likely to use a doctor's recommendation to find care (15%).
- While only 3% of Gen Zers use a virtual visit platform as their main source of primary care, one in five would "definitely" or "probably" consider using telehealth for future care needs.
- Only 14% of Gen Zers said they will "definitely" or "most likely" stay with their current PCP for at least the next 12 months. Their Net Promoter Score (NPS) of -58 is the lowest of all generations.

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

What are their primary care preferences?

- When choosing a new PCP, Gen Zers are looking for great customer service, clinic-coordinated follow-up care, and a team-based care model. They are also the most open to seeing an advanced practice provider (APP).
- Relative to other age cohorts, Gen Zers are most likely to value having access to an on-site pharmacy and pre-visit price quotes.
- Gen Zers care about primary care clinic affiliation more than any other generation, but do not agree on which affiliation type is most preferable—instead distributing their preference across types. However, they are the least resistant of all age cohorts to the idea of receiving care at an Apple- or Amazon-owned clinic.

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	21%	10%	9%	12%	6%	15%
Least preferred	13%	13%	13%	10%	31%	

- Though they've grown up in an increasingly on-demand world, Gen Zers are the most tolerant of wait times to be seen for a mid-acuity condition like the flu. Forty-five percent would wait more than two days for an appointment at their normal site of care, relative to 27% of boomers.

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
11%	17%	27%	27%	9%	9%

1. Academic medical center.

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

What are their primary care preferences?

- For lower-acuity conditions like shoulder pain, Gen Zers—along with the Silent Generation—are the most intolerant of wait times. Two-thirds would leave their normal clinic for another site of care 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
11%	16%	37%	20%	11%	4%

- The majority of Gen Zers (78%) report being willing to pay a $200 annual fee for premium clinic services. In addition to access guarantees, Gen Zers want gym access through their clinics, integrated mobile apps, and even fitness classes—features that other generations didn't much value.

Premium service offering	Percent willing to pay
Guaranteed same- or next-day appointments	23%
Gym access at clinic	21%
App with health record, bill pay, scheduling, and messaging functions	21%
Faster access to specialists	16%
24/7 virtual access to a doctor	13%
Physician house calls	13%
Fitness classes at clinic	12%
Premium customer service	11%
Nutrition/weight loss counseling	10%
Remote monitoring through wearable devices	10%
Meditation/yoga classes at clinic	10%
Transportation to/from appointments	10%
Genetic tests/care customization	9%
Longer visits	7%
Acupuncture	5%

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

Conversations you should be having.

01

What are our experiences interacting with Gen Z patients? Did this data change our understanding of this group? What additional data do we need to collect to better understand them? How can we differentiate baseline expectations from preferences?

02

How do Gen Zers fit into our overall strategy? Should we harness this group's telehealth receptiveness to drive adoption of virtual visits? Can we deploy our APPs to see this group, thus freeing up physician capacity for older cohorts?

03

What changes or investments could we make to become more attractive to this cohort? What can we do to promote greater trust and familiarity between Gen Zers and our providers? Is our staffing model optimized to promote team-based care? Can we be doing more to connect patients to behavioral health support? Are there specific premium clinic offerings that we're well-positioned to offer? How can we test true willingness to pay for premium offerings? Can we invest in search engine optimization to reach more prospective patients?

04

Are there existing capabilities that we should emphasize more clearly when interacting with this population? How are our traditional clinics different from urgent care sites and retail clinics? Do we have online tools and cost calculators that we can market more aggressively?

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

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

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