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## CHEAT SHEET

# Millennials and Primary Care

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## A Guide to Millennials' Primary Care Behaviors and Preferences

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### Key takeaways

- Quick to leave: most millennials are not loyal to primary care providers (PCPs). Because they care deeply about on-demand access and have a very low tolerance for wait times, they won't hesitate to use urgent care if you're not available.
- Value positive interactions—not just expediency: millennials care more about customer-orientation than other generations. They expect positive, personalized encounters with their care team and are less tolerant of poor experiences.
- Cost-conscious, but access-driven: millennials are the most price sensitive when shopping for care, but are very open to paying for premium services—especially if they're related to access.
- Your best bet for telehealth: millennials are more open than any other generation—including Gen Z—to using virtual visits for basic urgent care.

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

# Who are they?

## Millennials are:

- Individuals born between 1981 and 1996.
- Part of the largest living generation in the U.S. (80 million members).
- Insured through work: most millennials (52%) have insurance through their employer and 38% report being on high-deductible health plans (HDHPs). Seven percent report being uninsured.
- Generally healthy, but many suffer from behavioral health conditions and comorbidities: nearly half (45%) report having zero chronic conditions, but those who do are likely to have at least two. The top three most common chronic conditions reported are: anxiety (29%), depression (21%), and asthma (15%).
- Just as likely to have children in their household as to not: 45% of millennials report having children under 18 living with them full- or part-time.

## Data Source

To better understand what millennials—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 millennials was 846.

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

# What are their primary care behaviors?

- Over the 12-month period preceding our survey, 66% of millennials visited a primary care provider at least once, compared to 73% of Gen Zers and only 43% of Boomers.

0 visits	1 visit	2-3 visits	4-5 visits	5+ visits
34%	27%	31%	5%	3%

- The majority of millennials report having a regular primary care provider (PCP), but 29% use an alternate site of care—such as urgent care or a retail clinic—as their main source of primary care. This utilization rate is less than that of Gen Zers (47%) and more than that of Gen Xers (18%).

Traditional PCP	Urgent care	Concierge care	Retail care	ED	Virtual visit	Different places	Not sure	Don't use
59%	9%	6%	4%	2.5%	1%	6%	7.5%	5%

- Half of millennials sought care outside of a traditional PCP office for their most recent basic urgent care need, such as fever or sore throat—a behavioral pattern nearly identical to that of the Gen Z cohort.

Traditional PCP (37%)			Alternative care site (50%)						Other (12%)
Normal PCP	Other PCP in clinic	Alternate clinic	Urgent care	Retail clinic	Virtual visit	ED	Kiosk	None/don't know	
24%	4%	9%	26%	8%	6%	8%	2%	12%	

- The most commonly cited source of information used to select a source of primary care was past experience (37%), followed by a recommendation from friends or family (23%). Millennials, along with Gen Zers, are the most likely to use online search to find care (19%).

# What are their primary care behaviors?

- Millennials' most common motivations for selecting their most recent site of primary care were: to be seen quickly, to see someone close to home, and to see someone covered by their insurance.
- Despite being tech-savvy, most millennials do not yet use virtual visits as a main source of primary care. However, this generation is more likely than any other to have used a virtual visit for their last basic urgent care need. Additionally, nearly a quarter would "definitely" or "probably" consider using a live virtual visit in the future.
- Only 19% of millennials said they will "definitely" or "most likely" stay with their current PCP for at least the next 12 months (NPS = -50). This percentage is only slightly higher than that of Gen Z (14%).

# What are their primary care preferences?

- As with other generations, access and convenience are the most important considerations when selecting a new primary care provider. Millennials want the ability to walk in and be seen within 30 minutes, call and get a same-day appointment, and get labs or x-rays done on-site if needed. They care least about having access to a worksite clinic or age-targeted clinic.
- Of the 78% of millennials who care about a clinic's affiliation, past experience with a hospital or medical group is most likely to influence their preference, while affiliation with a technology company such as Apple or Amazon is least likely to pique their interest.

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

	Past experience	Independent clinic	Insurance-run clinic	<sup>1</sup> AMC	Apple or Amazon	Don't care
<b>Most preferred</b>	30%	15%	14%	14%	5%	
<b>Least preferred</b>	6%	8%	13%	9%	43%	22%

- Millennials are less likely than other generations to say that they would not wait at all to receive care for a mid-acuity condition like the flu. However, they still won't wait long: only 40% report that they'd tolerate a wait of more than one day.

*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
16%	13%	32%	23%	11%	6%

# What are their primary care preferences?

- For low-acuity issues like shoulder pain, 40% of millennials—slightly more than older generations—would tolerate a wait time longer than 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
12%	15%	32%	25%	10%	5%

- Seventy-five percent of millennials would pay \$200 a year for access to premium clinic services, relative to 78% of Gen Zers and 60% of Gen Xers. Millennials are especially interested in same-day, virtual visit, or specialist access guarantees.

Premium service offering	Percent willing to pay
Guaranteed same- or next-day appointments	22%
24/7 virtual access to a doctor	18%
Faster access to specialists	17%
Physician house calls	16%
Premium customer service	15%
App with health record, bill pay, scheduling, and messaging functions	15%
Genetic tests/ care customization	14%
Gym access at clinic	13%
Nutrition/weight loss counseling	13%
Fitness classes at clinic	11%
Longer visits	9%
Transportation to/from appointments	9%
Remote monitoring through wearable devices	8%
Acupuncture	8%
Mediation/yoga classes at clinic	7%

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

# Conversations you should be having.

**01**

**What are our experiences interacting with millennial patients?** Did this data change our understanding of this group? What additional data do we need to collect?

**02**

**How do millennials fit into our overall strategy?** What percentage of our patients are millennials? Would an age-segmented primary care strategy meet our current and future market demands?

**03**

**What existing capabilities should we emphasize more clearly when interacting with this population?** Do we have online convenience features or on-demand virtual visit capabilities that are poorly branded or utilized? Are there affiliated sites such as urgent care centers that we should connect patients to when we do not have same-day availability?

**04**

**Are there changes or investments we should make to improve convenience, experience, or on-demand access capabilities for this cohort?** What can we do to offer a more user-friendly online experience? Can we accommodate interest in evening appointments and same-day appointments?

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