CHEAT SHEET

The Silent Generation and Primary Care

A Guide to the Silent Generation's Primary Care Behaviors and Preferences

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Key takeaways

- Primary care traditionalists, but still open to alternate options: 86% of Silent Generation consumers rely on traditional PCPs for ongoing care, but a third used an alternative setting the last time they needed basic urgent care. Similarly, while this cohort favors seeing a physician over an advanced practice provider (APP), two-thirds report being open to seeing an APP in the future.
- Have a narrow set of clinic non-negotiables: when presented with 40 possible clinic attributes, members of the Silent Generation collectively rallied around 10 specific attributes.
- Intolerant of long wait times: just 9% of patients from this generation would wait more than two days for an appointment for a mid-acuity issue like the flu. For low-acuity issues like shoulder pain, two-thirds would leave their regular clinic if they had to wait more than a week.

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

Who are they?

The Silent Generation is:

- Comprised of individuals born between 1928 and 1945 (24 million Americans).
- Increasingly covered by Medicare Advantage (MA) plans: 39% are enrolled in MA plans, and 57% are covered by traditional Medicare. Few (8%) are on high-deductible health plans (HDHPs), and just 1% report being uninsured.
- Often medically complex: 86% have at least one chronic condition and on average, have three. The most commonly cited conditions are: high blood pressure (62%), high cholesterol (49%), arthritis (30%), and diabetes (24%).
- Less challenged with behavioral health issues than other cohorts: this generation reported significantly lower rates of depression (6%) and anxiety (3%) than younger generations. These conditions also ranked in the bottom three of all reported chronic conditions.

Data Source

To better understand what the Silent Generation —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 this generation was 210.

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

What are their primary care behaviors?

- Despite having some of the highest chronic condition rates, the Silent Generation is less likely to check in with their PCP than any other generation. Over the 12-month period preceding our survey, two-thirds reported never visiting their primary care clinic, compared to a third of millennials.

0 visits	1 visit	2-3 visits	4-5 visits	5+ visits
62%	24%	13%	0%	1%

- The Silent Generation overwhelmingly prefers traditional clinic settings for ongoing primary care. Just 9% rely on alternative care sites as their main source of primary care, compared to 47% of Gen Zers.

Traditional PCP	Urgent care	Concierge care	Retail care	ED	Virtual visit	Different places	Not sure/other	Don't use
86%	1%	1%	1%	1%	0%	5%	3%	2%

- Fifty-one percent of Silent Generation consumers sought care at their normal PCP for their most recent basic urgent care episode—more than all other age cohorts. Those using alternative care sites prefer urgent care centers.

Traditional PCP (59%)			Alternative care site (29%)					Other (12%)
Normal PCP	Other PCP in clinic	Alternate clinic	Urgent care	Retail clinic	Virtual visit	ED	Kiosk	None/ don't know
51%	5%	3%	18%	1%	2%	7%	1%	12%

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

What are their primary care behaviors?

- The Silent Generation is the most likely of all generations to rely on past experience to guide future care decisions (63%). They are also the only group besides Gen Z that reports using doctors' recommendations to find care (13%).
- Members of the Silent Generation place a higher value on getting care from a familiar provider than they do on getting care quickly or close to home. Insurance coverage is also top-of-mind for this cohort when choosing care—more so than any other generation.
- Just 8% of the Silent Generation report that they would "definitely" or "probably" consider using a webcam virtual visit for future primary care, compared to 22% of Gen Xers and 22% of millennials.
- Almost two-thirds of the Silent Generation (60%) said that they will "definitely" or "most likely" stay with their current PCP for at least the next 12 months. This translates to a Net Promoter Score (NPS) of 35.7, which is the highest of all generations and 94 points higher than that of Gen Zers.

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

What are their primary care preferences?

- When presented with a list of 40 possible clinic attributes, the Silent Generation overwhelmingly values 10 specific attributes when selecting a PCP. These items, which include on-demand access, on-site coordination services, cutting-edge technology, and high quality and patient satisfaction scores, constitute three-quarters of this group's total utility score. In contrast, Gen Zers spread the same value across 23 attributes.
- The Silent Generation prefers to see a physician instead of an APP, ranking this a top 5 clinic attribute. However, two-thirds also say they would "definitely" or "probably" consider using a nurse practitioner or physician assistant for their routine, non-acute care needs, such as medication management and chronic condition check-ups. Twenty-seven percent would see a pharmacist.
- The Silent Generation is the least interested of all generations in using free population health-oriented services, such as behavioral health support or help combatting social loneliness. Of the 50% who would be interested, nutritional counseling (14%), help finding healthy, low-cost food (11%), and support with health insurance enrollment (8%) are the most preferred options.

1. Utility scores are a measure of importance. They show which MaxDiff attributes were most important, and how much more important they were to survey respondents than other attributes. This data reflects a ratio-quality scale.

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

What are their primary care preferences?

- The Silent Generation cares less about a clinic's affiliation than any other generation. Of the two-thirds who do care, past experience with a hospital or medical group is most likely to influence their preference. They are, perhaps unsurprisingly, least interested in the idea of an Apple- or Amazon-affiliated clinic.

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

<table>
<tr><th></th><th>Past experience</th><th>Independent clinic</th><th>Insurance-run clinic</th><th>AMC[1]</th><th>Apple or Amazon</th><th>Don't care</th></tr>
<tr><th>Most preferred</th><td>48%</td><td>6%</td><td>5%</td><td>9.5%</td><td>0.5%</td><td rowspan="2">31%</td></tr>
<tr><th>Least preferred</th><td>2%</td><td>4%</td><td>9%</td><td>0%</td><td>54%</td></tr>
</table>

- The Silent Generation is less tolerant of wait times for mid-acuity conditions like the flu than any other generation. Four in five would leave for another clinic if their regular clinic couldn't see them within a day. Of those who would wait, just 9% would wait more than two days, relative to 18% of Gen Zers.

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
22%	15%	44%	10%	5%	4%

- For lower-acuity conditions like shoulder pain, members of the Silent Generation—along with Gen Zers—are the least tolerant of wait times. Only 11% would wait more than a week to be seen.

Wait tolerance for low-acuity issue

No wait	Up to 1 day	2-3 days	4-7 days	2-3 weeks	>3 weeks
10%	16%	40%	23%	9%	2%

1. Academic medical center.

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

What are their primary care preferences?

- The Silent Generation is the least willing of any age group to pay a $200 annual fee for premium clinic services. Of the 32% who would pay extra, the most preferred services are access-related: same- or next-day appointments, faster specialist access, and physician house calls.

Premium service offering	**Percent willing to pay**
Faster access to specialists	16%
Guaranteed same- or next-day appointments	15%
Premium customer service	11%
Physician house calls	10%
Transportation to/from appointments	7%
Longer visits	6%
24/7 virtual access to a doctor	5%
App with health record, bill pay, scheduling, and messaging functions	5%
Nutrition/weight loss counseling	3%
Gym access at clinic	3%
Acupuncture	2%
Genetic tests/care customization	2%
Fitness classes at clinic	2%
Remote monitoring through wearable devices	1%
Mediation/yoga classes at clinic	1%

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

Conversations you should be having.

01

What are our experiences interacting with patients from the Silent Generation? What additional data can we collect to better understand this group—especially around provider preferences and perceived barriers to primary care access?

02

How can we improve primary care utilization and care outcomes for this generation? What strategies and communication channels are we currently using to engage with patients in this cohort? Are there programs or services we can offer to improve primary care utilization and chronic condition management support? Do we have access to pharmacists or other specialized providers who can work with patients on specific needs?

03

What changes or investments could we make to our clinic services and operations to become more attractive to this cohort? Can we adjust our scheduling process to offer weekend hours or to accommodate same-day appointments for mid-acuity needs? What network care sites can we refer patients to when same-day appointments are not available? Can we accommodate this generation's preferences for seeing physicians?

04

Are there existing capabilities we should emphasize more clearly when interacting with this population? Do we currently educate patients about the benefits and capabilities of APPs? Do we have on-site lab and X-ray capabilities that we can market?

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

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INFOGRAPHIC
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advisory.com/pediatrics

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

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