

Millennials and Digital Healthcare Behaviors





Online survey



n=400



Fielded: December 9-14, 2016



National sample with oversample of Millennials

Note: Arrows (↑↓) and **bolded scores** indicate a statistically significant difference for Millennials vs. older



WHAT DID WE LEARN?



Millennials are stressed!

Low energy
39%

Not enough time for me
29%

I suffer from migraines
18%

Chronic back/joint pain
32%

I smoke
13%

Worried about my health as I age
34%

Take Rx
57%

I have diabetes
15%

Take Rx
90%

Worried about my health as I age
38%

I have arthritis
36%

I have diabetes
20%

I have/had cancer
17%

Hip/knee replacement
25%

Millennials

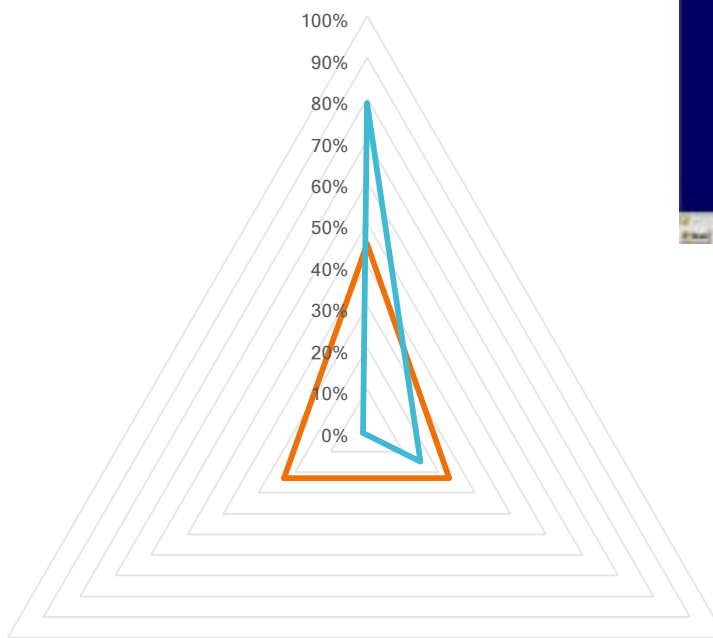
Gen X

Boomers

Silent



Can't stand pop-up ads; ignore and skip



I like pop-up ads and tend to look at them to find relevant ones

Not a big fan but click on those that are relevant

— Millennials — Older

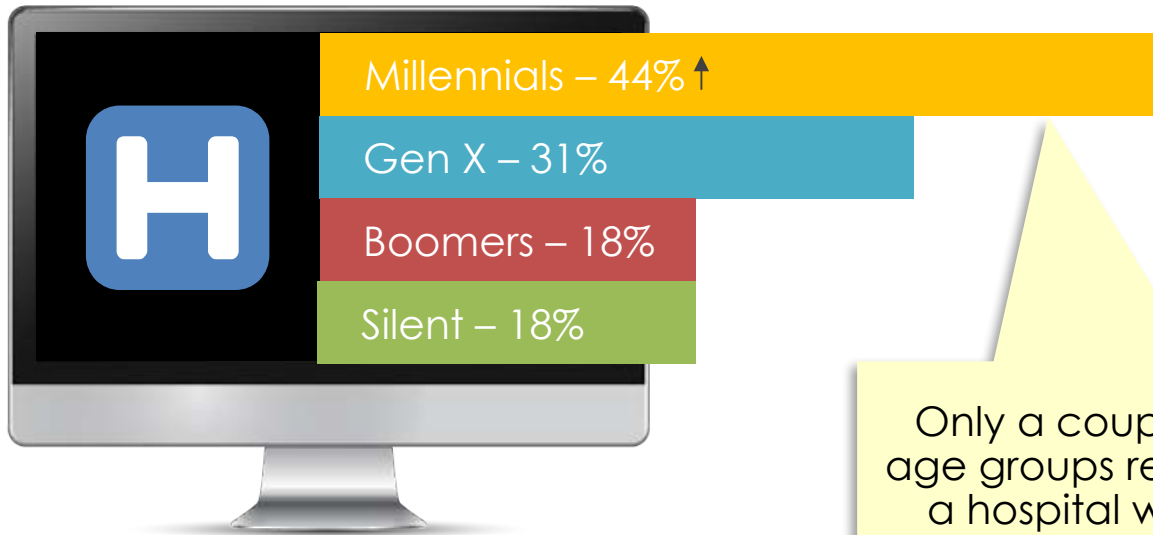


Google Chrome is the dominant browser used by Millennials (**66%**) for any search



...and 65% of Millennials start here





Only a couple of differences across age groups regarding why they visited a hospital website – Millennials are more likely to search for health and wellness information, while seniors are more likely to search for medical condition-specific information.

Article/video load time (Immediately)

Millennials – 20%[↑]

Older – 9%

Maximum acceptable length of a video

Millennials ~ 4 minutes

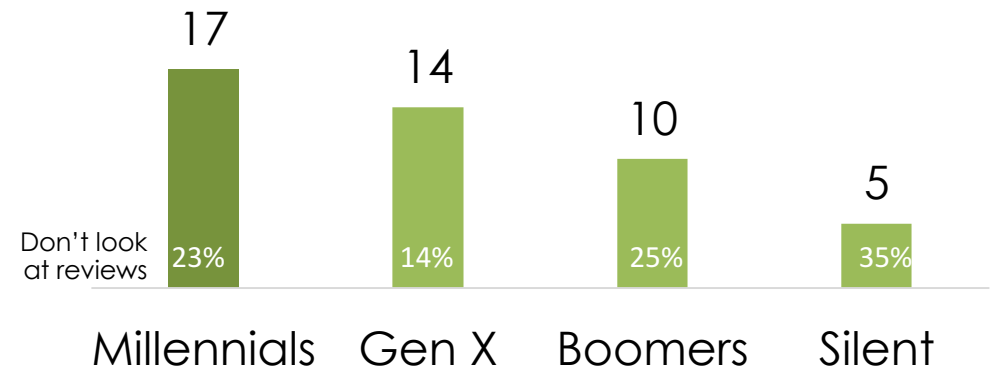
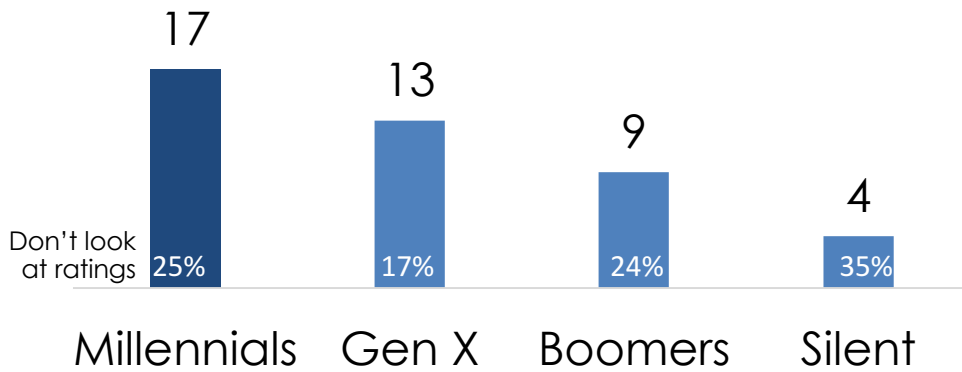
Older ~ 5 minutes



Number of ratings/reviews want to see when choosing a hospital

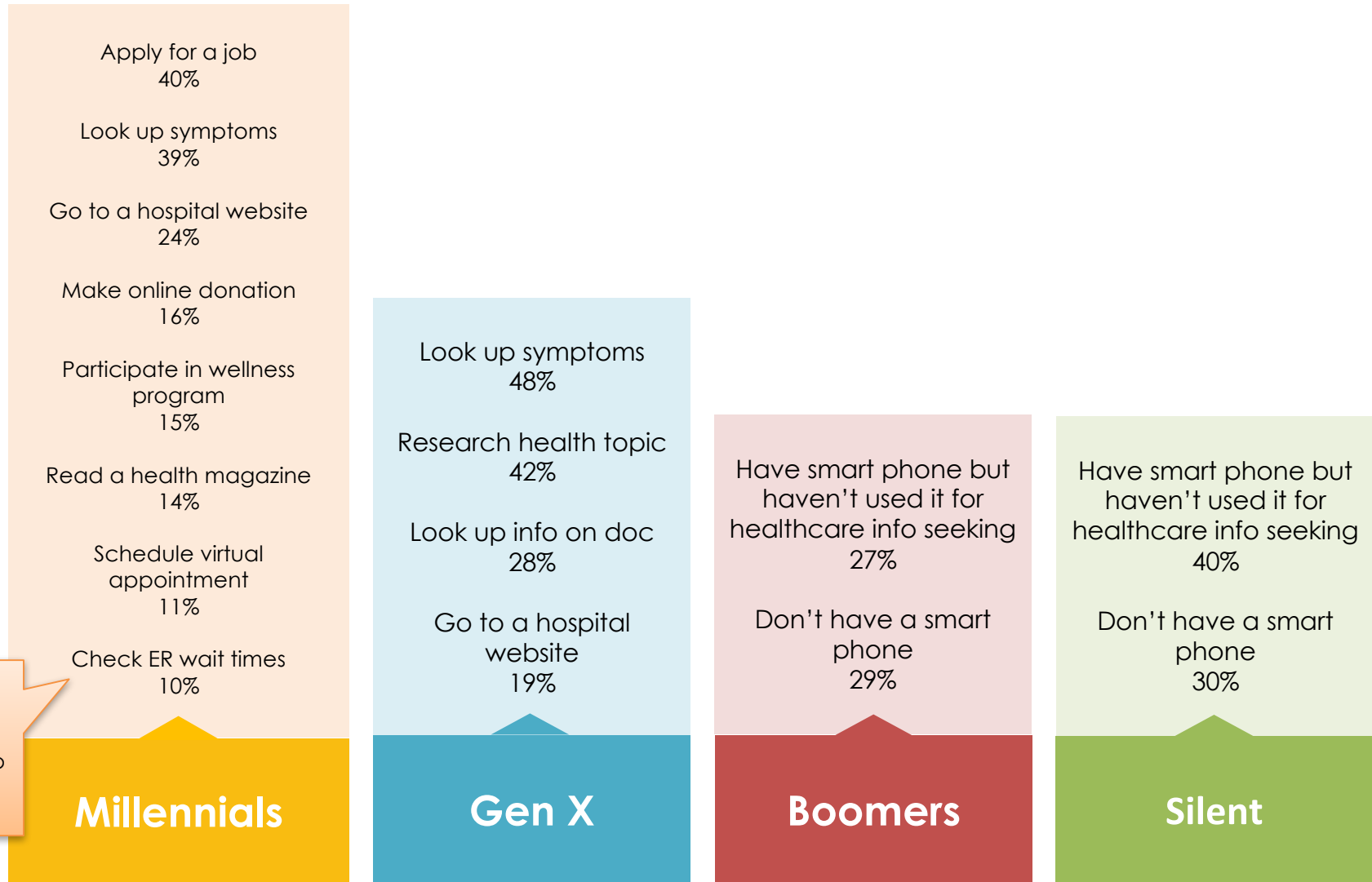
Average number of ratings consumers need to see to find them useful in choosing a hospital

Average number of reviews consumers need to see to find them useful in choosing a hospital



	Millennials (18-34)	Gen X (35-49)	Boomers (50-68)	Silent (69+)
I need <u>both</u> ratings and supporting reviews for them to be useful to me in choosing a hospital	35%	40%	57%	54%
Qualitative <u>reviews</u> are more useful to me	29	30	14	16
Quantitative <u>ratings</u> are more useful to me	25	14	2	14
Not sure	11	16	27	16

Top smart phone uses for healthcare information seeking



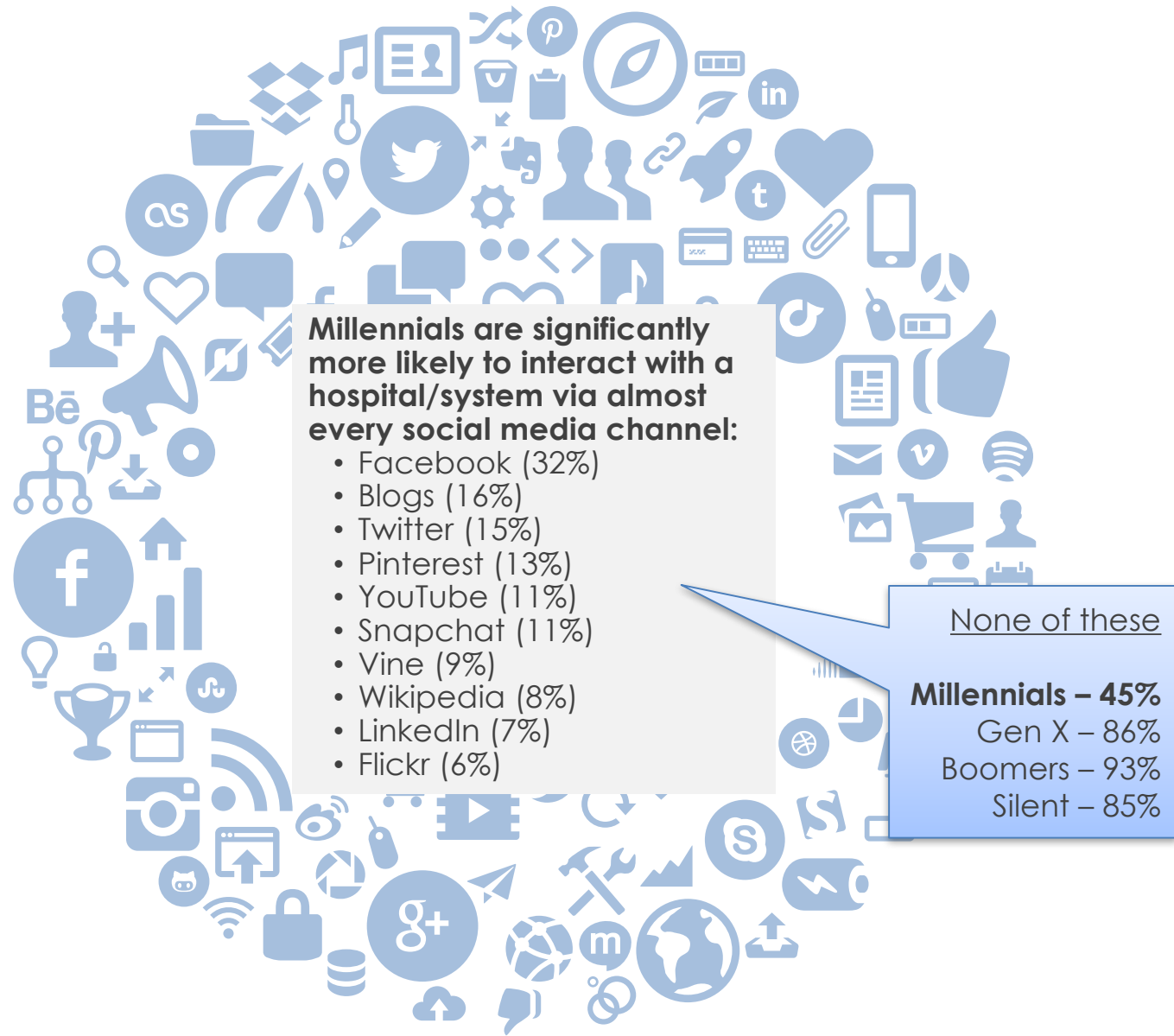
29% of Millennials have used a hospital's App to check ER wait times.

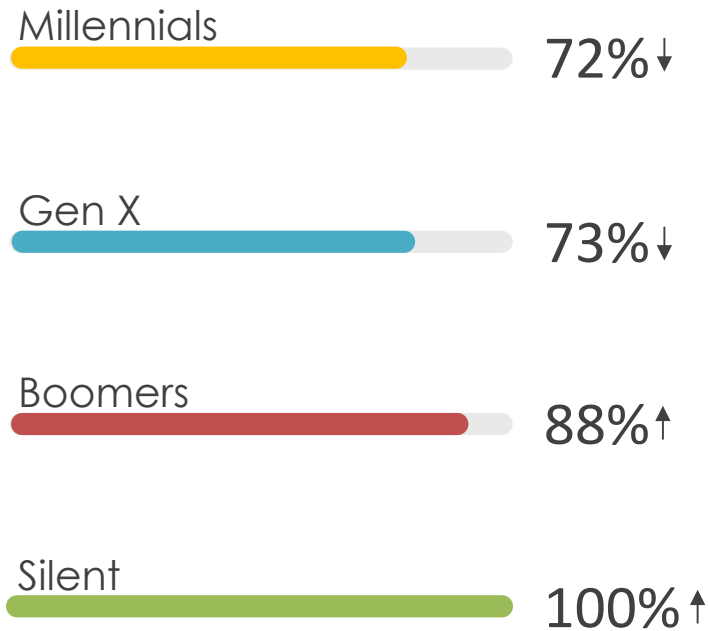


Following a hospital's Facebook page

- **Millennials – 15%**
- Gen X – 2%
- Boomers – 1%
- Silent – 0%

- Ways Millennials are significantly more likely to come in contact with a hospital/system:
 - ✓ Liked Facebook page – 16% (Older – 4%)
 - ✓ Visited Facebook page – 12% (Older – 1%)
 - ✓ Followed on Twitter – 14% (Older – 0%)
 - ✓ Followed on LinkedIn – 8% (Older – 0%)
 - ✓ Signed up but haven't yet used patient portal – 12% (Older – 2%)



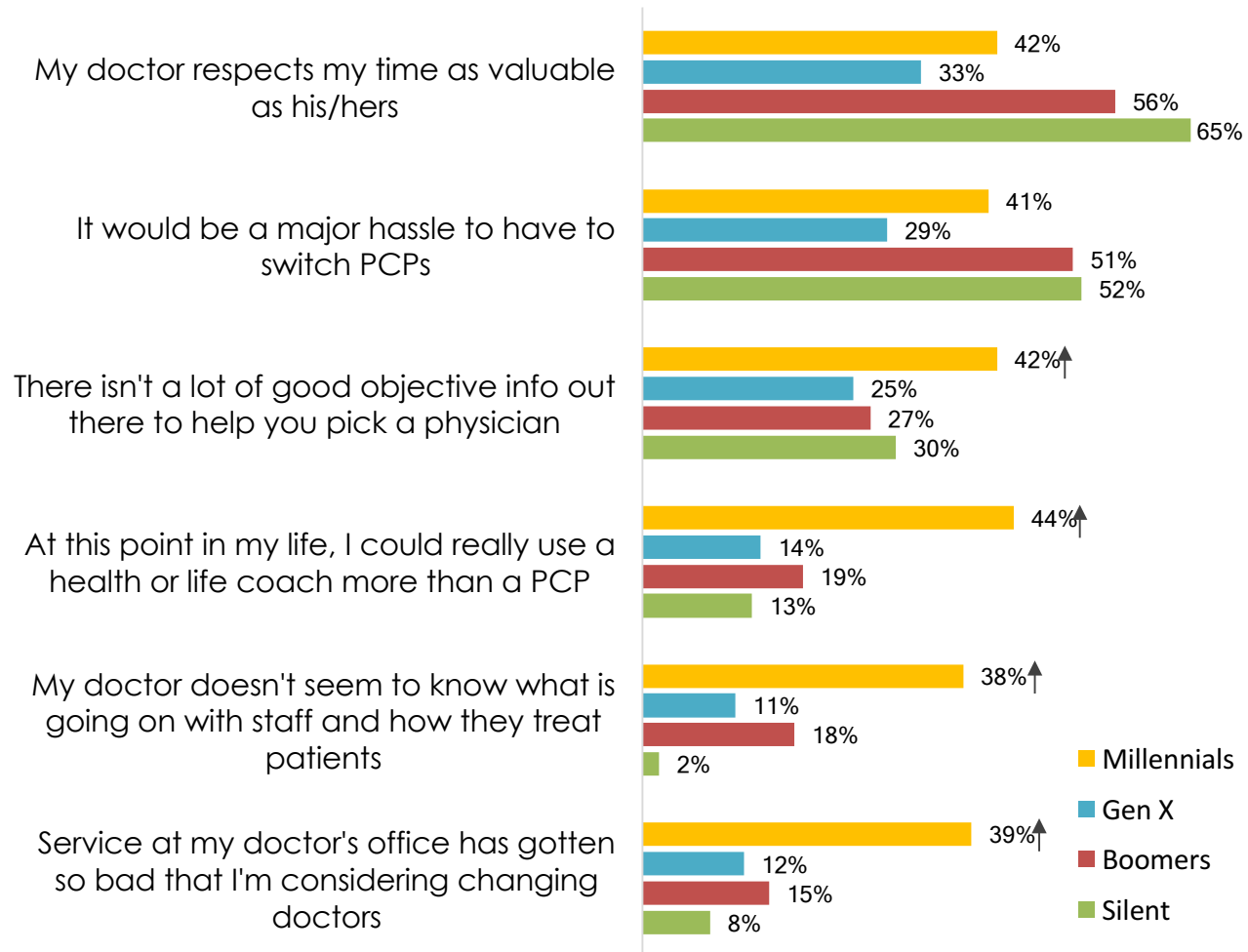


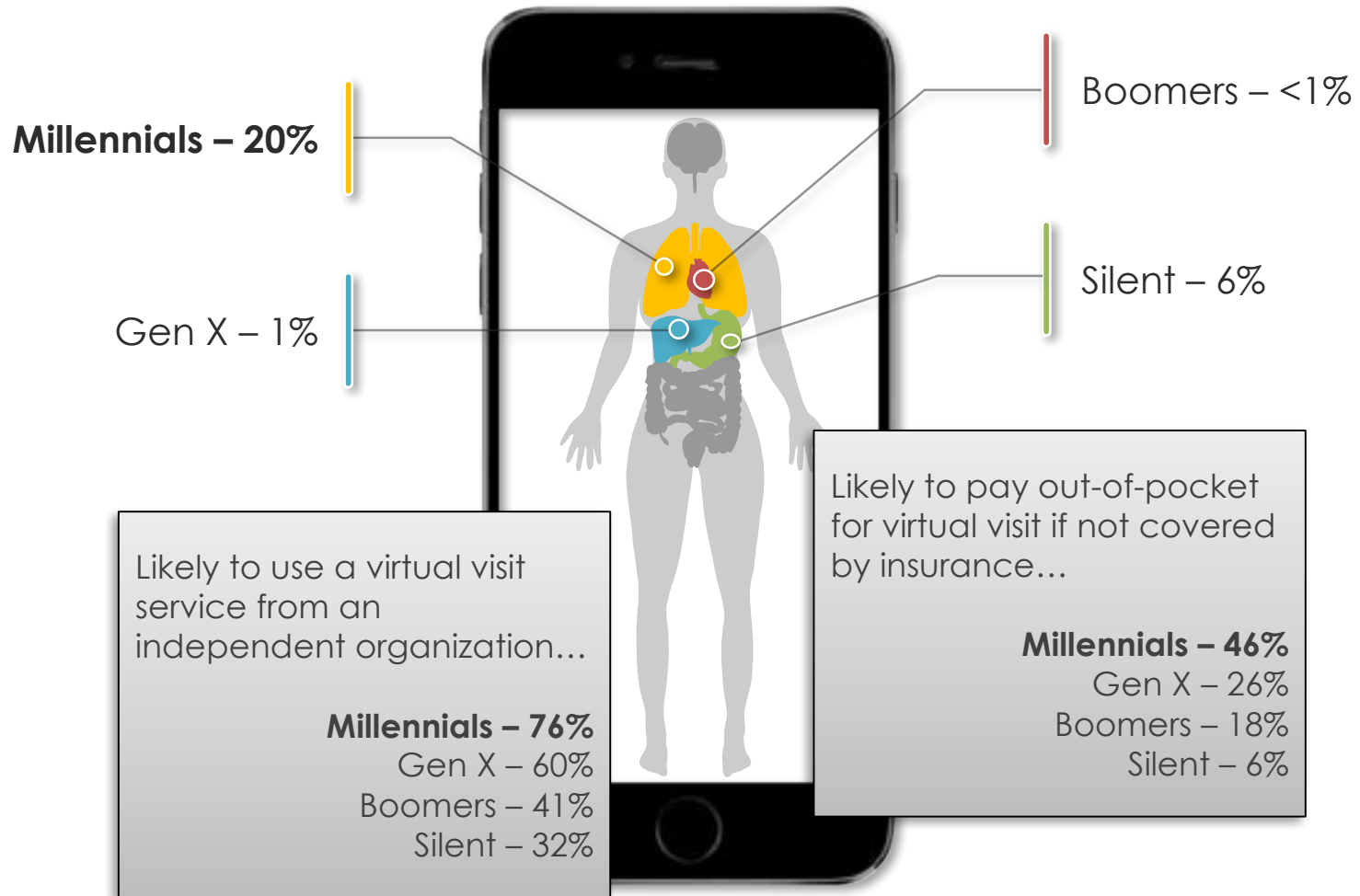
Millennials are more likely to have switched PCPs because of: 1) a change in health plans and PCP no longer in-network or 2) poor service from office staff.

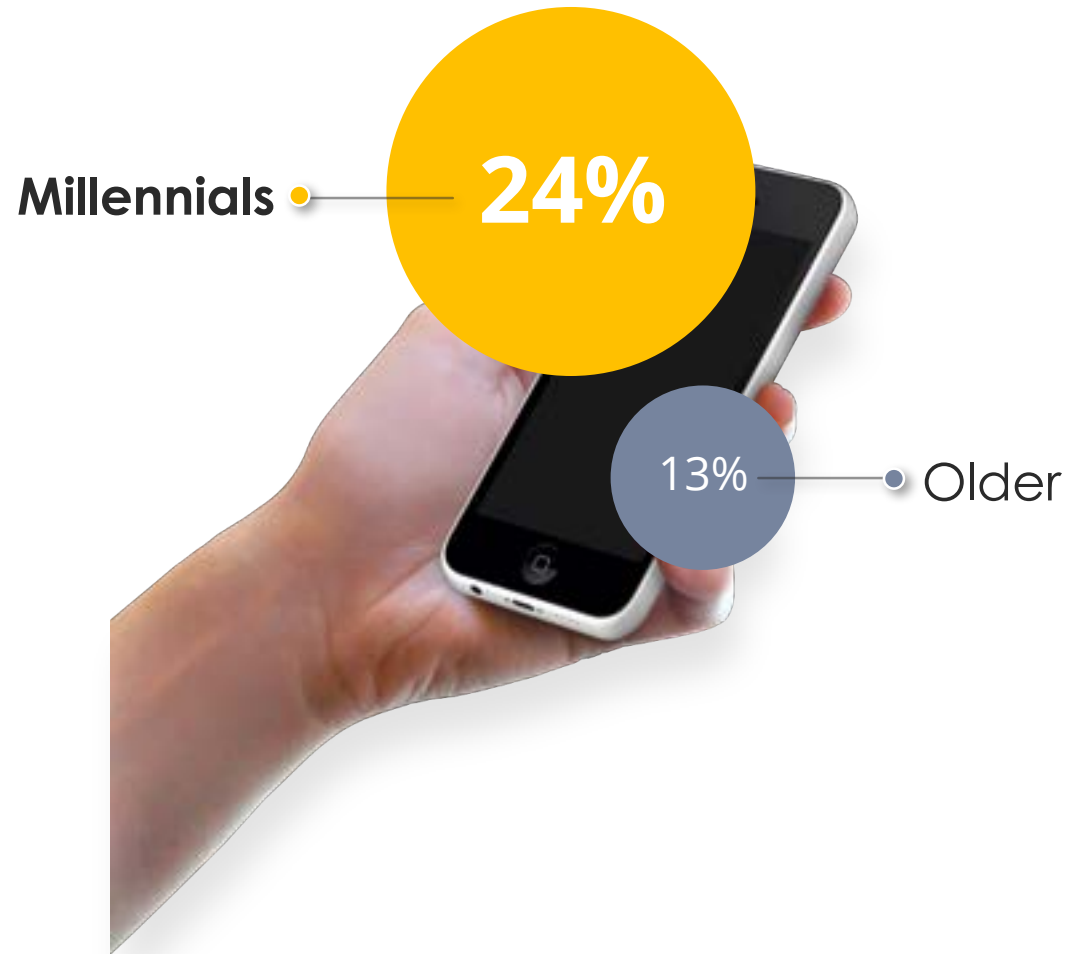


And Millennials without a PCP are significantly more likely to go to a hospital ER for primary care! (33% vs. 13% Older)

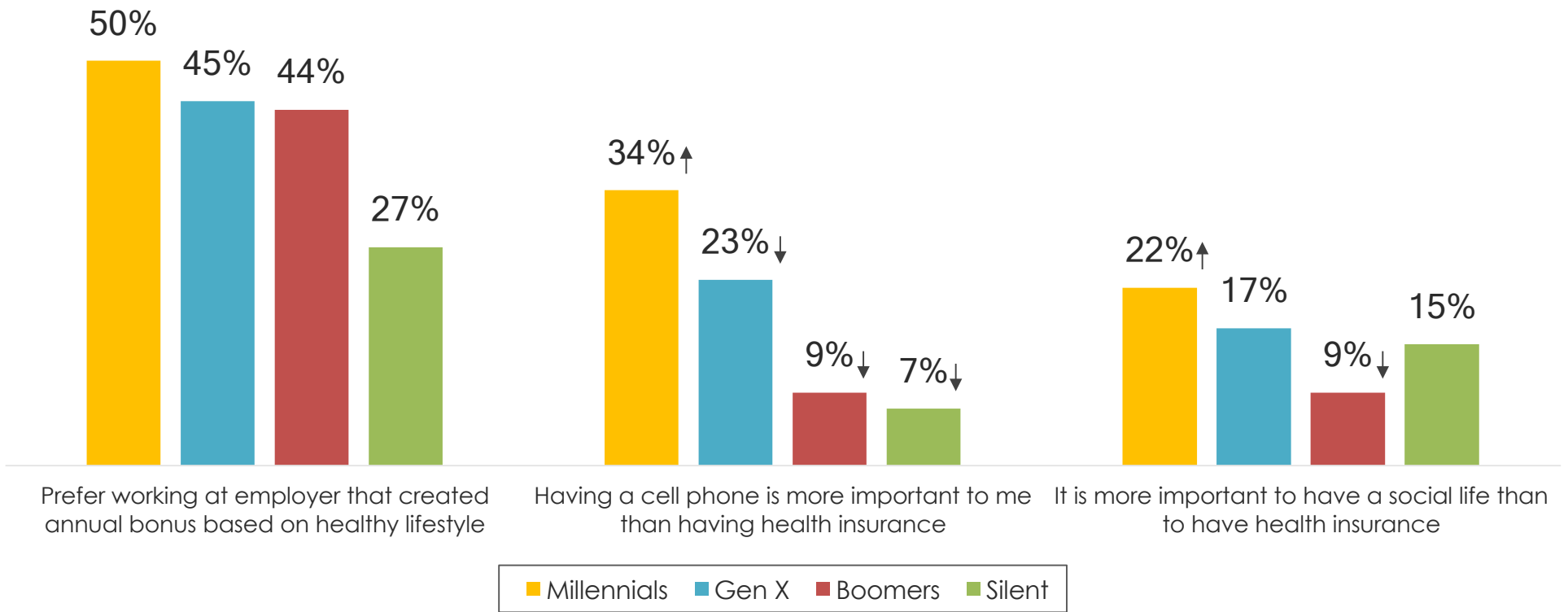
Agree with this statement...



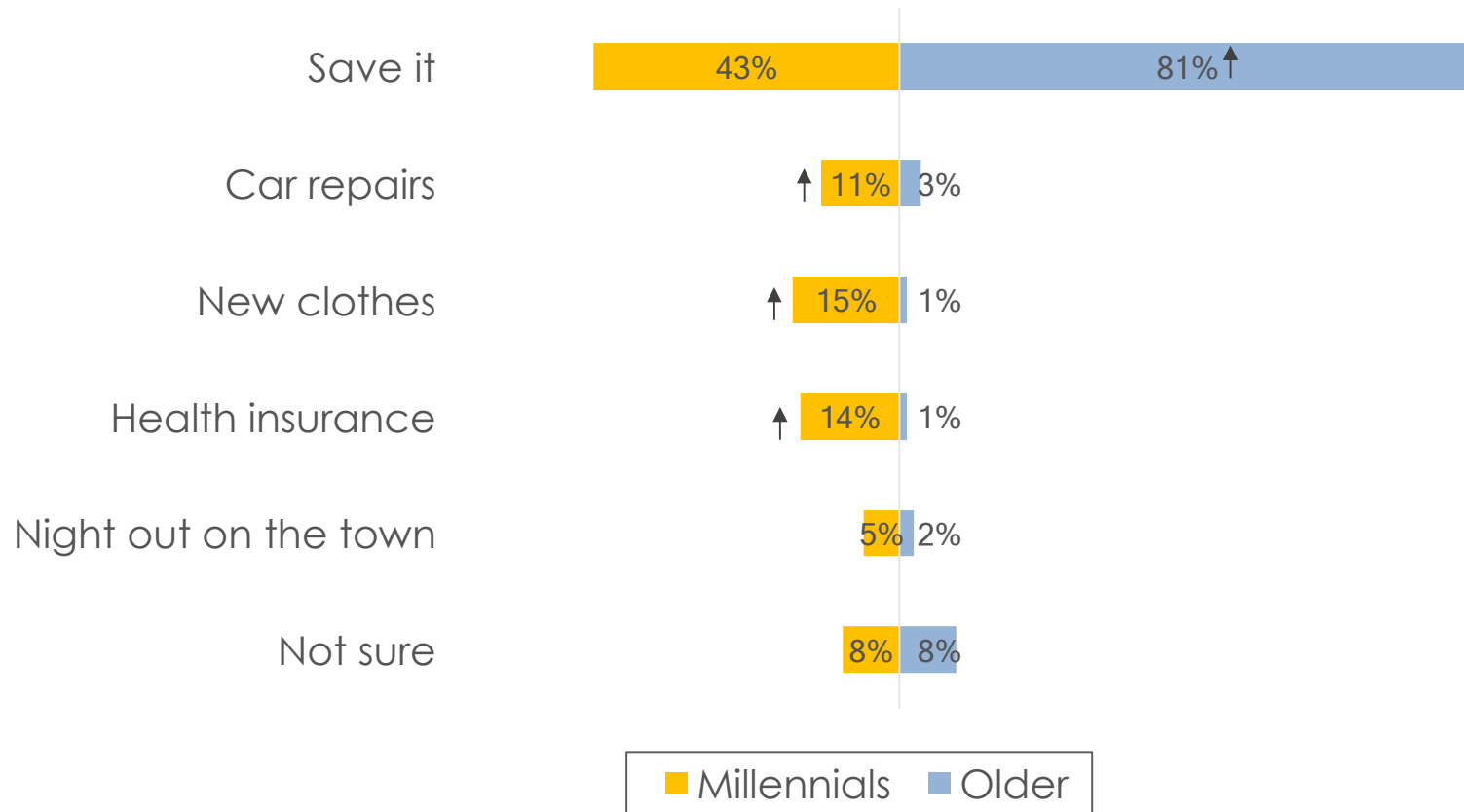




Agree with this statement...



What would do with \$100 left at the end of the month



MILLENNIALS ARE SIGNIFICANTLY MORE LIKELY TO HAVE AND USE A WEARABLE



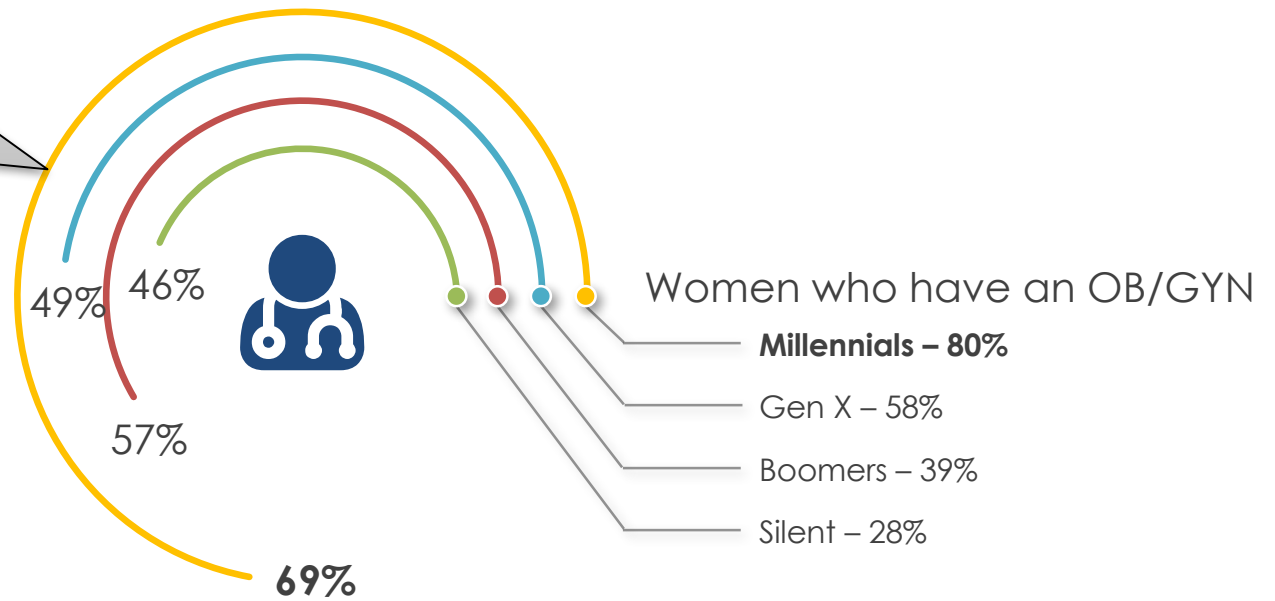
Millennials	Gen X	Boomers	Silent
36%	17%	10%	7%



AND, FOR MILLENNIALS, IT'S MOST LIKELY AN APPLE WATCH (44%)

Once women reach their mid-thirties, OB/GYN gender preference wanes significantly.

Prefer a Female OB/GYN

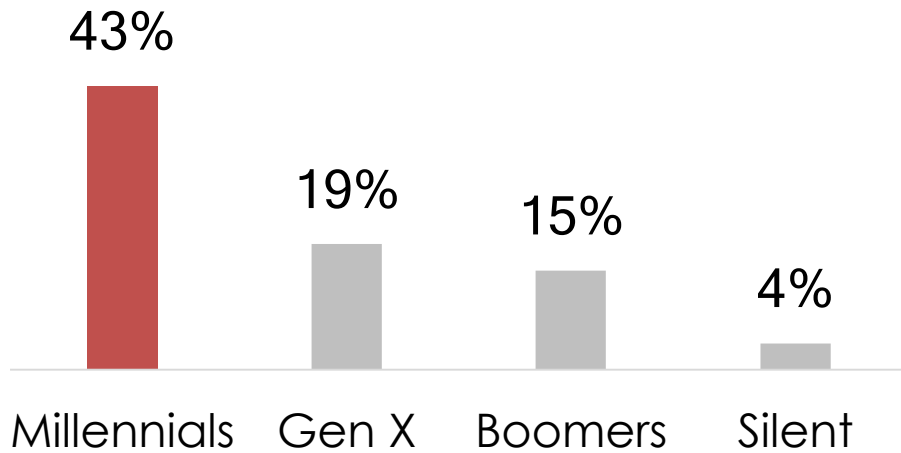


	Millennials (18-34)	Gen X (35-49)	Boomers (50-68)	Silent (69+)
Asked about prices	43%	31%	18%	21%
How contacted provider	Online - 30% Email - 29%	Called 95%	Called 79%	Called 63%
Services more likely checked pricing on	Doctor visit - 55% Inpatient surgery - 28% ER/urgent care - 22% Plastic surgery - 9%	Lab services - 47% GI procedure - 20%	Dental services - 33%	Inpatient surgery - 39% Outpatient surgery - 34% PT - 34% Ortho surgery - 37% Screening - 26% Bariatric surgery - 21%
Chose the lowest priced option	45%	48%	24%	1%
Total asked about and chose the cheapest option	19%	15%	4%	<1%

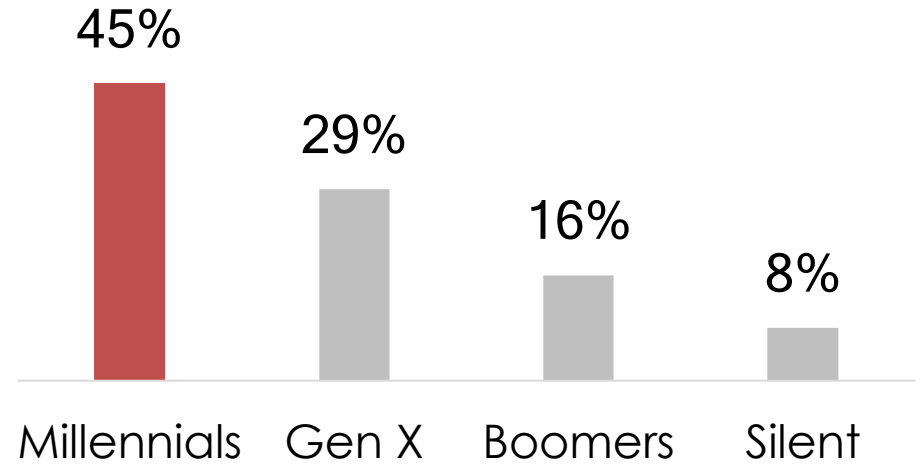
(e.g., 43% x 45% = 19%)

15%
in 2014

Overall, **23% of Americans** have had a significant financial hardship in the past year due to medical bills



Overall, **27% of Americans** have had to delay or avoid seeking medical care because they couldn't afford it



Demographic Profile	Millennials (18-34)	Gen X (35-49)	Boomers (50-68)	Silent (69+)
Female	71%	56%	66%	55%
Parent	60%	34%	6%	1%
College degree	43%	35%	21%	23%
<u>Ethnicity</u>				
Caucasian	40%	70%	75%	83%
Hispanic	41	12	3	0
African American	10	10	14	12
Asian	5	5	2	1
Median income	\$51,163	\$53,971	\$60,701	\$42,826

Type of health insurance	Millennials (18-34)	Gen X (35-49)	Boomers (50-68)	Silent (69+)
Group/Union	39%	40%	42%	5%
Individual	13	7	9	7
Exchange	4	2	6	0
Medicare	14	8	25	88
Medicaid	6	17	6	0
VA/CHAMPUS	2	3	5	0
No insurance	6	18	6	0



KEY TAKE-AWAYS

- 1) Millennials are more stressed than their older counterparts. That may be a reason why they are more likely to search for health and wellness information on hospital websites. In fact, more than four in ten Millennials have visited a hospital or health system website recently. **Do you offer information to help Millennials stay healthy and de-stress on your website?**
- 2) Millennials = Google Chrome and Google searches... period.
- 3) More than four in ten Millennials have gone online to social networking site and shared their healthcare experiences (45% vs. just 10% of older consumers). **Physician rating/review systems are key to growth for your organization.**
- 4) But when picking a hospital, Millennials prefer a quality ranking organization over consumer-driven reviews (**e.g., don't discount Healthgrades vs. Angie's List or Yelp! You need both**).
- 5) Millennials also want more ratings/reviews to be confident in the information – 17 on average. **The good news – This is not really a huge hurdle to overcome.**
- 6) Millennials use their Smart Phone for many more healthcare uses such as applying for a job, looking up symptoms, going to a hospital website, making online donations, participating in a wellness program, reading a health magazine, scheduling a virtual visit, and checking ER wait times. **Do you have an effective mobile strategy that is the driver of an Omni-channel experience? And, with new voice-activated technology such as the Echo and Google Home devices, what will a 'Voice' strategy look like in healthcare? Is it currently part of your Omni-channel strategy?**
- 7) Facebook followers? Millennials! But that's not all. Millennials are also significantly more likely to interact with you via Blogs, Twitter, Pinterest, YouTube, Snapchat, LinkedIn, Instagram, etc. **You have to have a broad-based digital strategy to meet your audience where they are.**
- 8) Millennials are least likely to have a primary care physician and they are more likely to switch doctors because of poor service from office staff. **No longer can a great doctor alone carry a weak office experience. They are looking for a full retail-like experience.**

- 9) In fact, Millennials are more likely to want a 'health coach' over a primary care physician. **This could be one way retailers cut into your primary care space without hiring doctors!**
- 10) One in five Millennials have had a virtual visit recently and they don't care if it is from an independent source (e.g., MD Live) over a hospital-owned source. And almost half are fine paying out-of-pocket for the convenience. **More retail competition for that primary care dollar!**
- 11) One in four Millennials has used online scheduling to see a doctor. **Open Table virtually eliminated the age-old practice of 'calling' for reservations. Online scheduling already is an expectation in healthcare for Millennials (i.e., not a differentiator).**
- 12) Health insurance is not as important to Millennials as it is to older consumers. In fact, having a cell phone is more important than insurance to Millennials as is having a social life. If they have \$100 left at the end of the month after all expenses, Millennials are significantly less likely to save it than their older counterparts. Instead, they are more likely to spend it on car repairs, new clothes, a night out on the town, or even health insurance. **Since well-being encompasses financial health in addition to physical, emotional, and spiritual health, is there an opportunity for healthcare organizations to help people better manage their finances? Think out of the box!**
- 13) A third of all Millennials has a wearable and it is most likely an Apple Watch. **Since they care more about health and wellness, how can healthcare use wearables as a conduit to building a relationship?**

- 14) The vast majority of Millennial women prefer a female OB/GYN. Gender preference in an OB/GYN declines significantly as women age. **Do you have enough female OB/GYNs to target Millennials?**
- 15) Millennials have been hardest hit financially due to medical bills and as a result are most likely to put off or avoid altogether seeking care. And when Millennials do seek care, they are most likely to price shop and pick the cheapest option. **Price strategies are long-standing practices in virtually every other industry. Price transparency and price competition are finally here in healthcare. Are you ready?**
- 16) Millennials are much more comfortable with companies learning their online habits to better target ads to them and they are significantly more likely to click on them. **Again, they are searching for ways to de-stress... do you have any ads that could address this? They are listening.**