

# How Consumers' Health Care Preferences Vary by Age

Millennials, Gen X, Baby Boomers, the Silent Generation—you know they all consume care differently, but what exactly do each of these groups want? And how can you become their provider of choice?

We surveyed thousands of consumers across the United States to better understand their care expectations and found that **some of the most significant variations fell across age groups**. Here, we've segmented each of our five consumer choice surveys by age to help you tailor your messages and target your investments to different generations across the care continuum.



18-29

**ON-DEMAND PRIMARY CARE**

**Cost-Conscious**  
A **free visit ranked #1** out of 56 clinic attributes.

Access Preference

**54%** prefer **after-hours** access over weekend access

**PRIMARY CARE PHYSICIAN (PCP) LOYALTY**

**Option Seekers**  
Likelihood to Switch PCPs in Next Year  
Scale: 0 (not at all likely) to 10 (extremely likely)

1.81 2.69 3.78

This group is the **least loyal**—they were the most likely to switch PCPs and the most likely to be enticed to leave for a new competitor's offering.

**SPECIALTY CARE**

**Referral Rebels + Online Shoppers**  
Likelihood to Break a Referral

33.9%

Not Likely Very Likely

33.9% of self-referrers in this group said they broke a referral to see a specialist of their choosing. They were also the **most likely to find a provider online**.

**SURGICAL CARE**

**Most Likely to Travel for Quality**  
15.9% of decision determined by travel time

Important Not Important

This age group is the **least concerned** about traveling for surgery. Perceived surgeon quality, hospital affiliation, and a referral determine more of their surgical decisions than other groups'.

**VIRTUAL VISITS**

**Ready for Virtual**

67% would consider a virtual visit if in-person care is unavailable that day

20% would consider a virtual visit if it was less expensive than in-person care

Ranking of Virtual Channels

1 2 3

**THE BOTTOM LINE**

This digitally fluent group is the **most socially connected generation**—they're the most likely to read reviews and compare prices to find providers offering maximum convenience at the lowest cost.

They're also the most likely to shop for providers and write reviews online.



30-49

**Cost-Conscious**  
A **free visit topped** this group's list of priorities.

Access Preference

**51%** prefer **after-hours** access over weekend access

**Price Beats Quality**

This group was **more likely to leave** their PCP **because of a \$250/year care cost increase** than experiencing a medical error.

**Willing to Break a Referral**  
Likelihood to Break a Referral

17.9%

Not Likely Very Likely

17.9% of self-referrers in this age group received a specialist referral but **shopped for care** instead of following it.

**Local Over Top Quality**  
17.3% of decision determined by travel time

Important Not Important

**Travel is not make-or-break** for this group—it factored less in their decisions than costs, but was still nearly 3x more important than perceived surgeon quality.

**Prime Virtual Visit Targets**

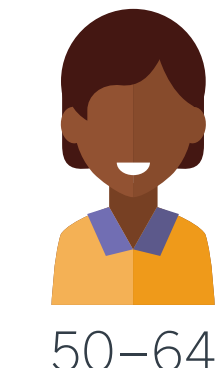
73% would consider a virtual visit if in-person care is unavailable that day

47% would consider a virtual visit if it was less expensive than in-person care

Ranking of Virtual Channels

1 2 3

These are the **health care decision influencers**—they often direct not only their own care, but also that of their partners, children, and aging parents. They want care to fit into their busy lives—during nontraditional hours and through virtual options.



50-64

**Access Seekers**  
This group **might pay more for access and convenience**: time to first available appointment and ancillaries on site outranked a free visit.

Access Preference

**57%** prefer **weekend** access over after-hours access

**Quality Over Price**

**Experiencing a medical error was more likely to make this group leave** their PCP than a \$250/year care cost increase.

**Unlikely Referral Breakers**  
Likelihood to Break a Referral

7.5%

Not Likely Very Likely

7.5% of self-referrers in this age group did not follow their doctor's referral for a specialist but instead **shopped for a specialist** of their choice.

**Cost Sensitive**  
18.9% of decision determined by travel time

Important Not Important

This group is **disinterested** in traveling for care and was the most cost-sensitive of the age cohorts when it comes to surgical care.

**Receptive to Virtual Visits**

62% would consider a virtual visit if in-person care is unavailable that day

32% would consider a virtual visit if it was less expensive than in-person care

Ranking of Virtual Channels

1 2 3

Increasingly delaying retirement, this group is **staying active** and **engaged in personal wellness** longer than before.

Often managing multiple chronic care conditions, these consumers expect timely access to in-person care.



65+

**Physician-Centric**  
Provider **continuity and credentials** were more important than a free visit.

Access Preference

**61%** prefer **weekend** access over after-hours access

**Most Loyal**  
Likelihood to Switch PCPs in Next Year  
Scale: 0 (not at all likely) to 10 (extremely likely)

1.43 1.81 2.69 3.78

The 65+ cohort is the **most loyal**—they were the least likely to leave their PCPs and also the most likely to recommend their providers.

**Affiliation Influences Choice**  
Likelihood to Break a Referral

7.0%

Not Likely Very Likely

Only 7% of these self-referrers reported breaking a referral to see a provider of their choosing. **Hospital affiliation was most important** in this cohort's specialist selection.

**Travel Avoiders**  
20.3% of decision determined by travel time

Important Not Important

This age group **doesn't want to travel** for care—travel time was more than twice as important as following a referral or hospital affiliation to this group.

**Most Resistant to Virtual**

58% would consider a virtual visit if in-person care is unavailable that day

20% would consider a virtual visit if it was less expensive than in-person care

Ranking of Virtual Channels

1 2 3

These are **health care's traditionalists**: they are the most loyal age group, least likely to break a referral, and disinterested in traveling for care.

However, as the Baby Boomers age into Medicare, they will alter the profile of the 65+ consumer group.