AN EXCERPT FROM THE WHITE PAPER

HEALTHCARE: WHO SURVIVES?

PRIMARY CARE PHYSICIAN: FUTURE IN FLUX

With insurance rules and business practices long having control over healthcare provider positioning, it seemed that primary care physicians (PCPs) would act as the gateway to medical treatment for years to come. However, younger generations are now growing up with entirely new care preferences.

With the number of physicians on the decline and the introduction of provider alternatives on the rise, it is evident that PCPs may be ready for a refresh. Competition aside, PCPs still remain at the top of the healthcare game and we wanted to know what it was going to take for them to maintain their hold on the throne.

WHY WE RESEARCHED

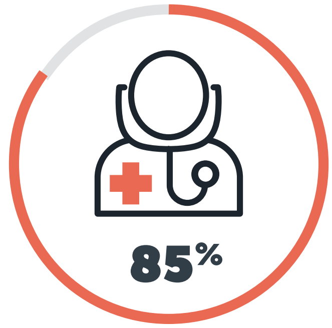
Our *Healthcare: Who Survives?* white paper gave clear indications that consumers are increasingly looking to move away from the primary care physician's office and towards more accessible, low cost care. But let's not get too far ahead of ourselves: PCPs still reign supreme in terms of which provider consumers consider for their healthcare needs. When thinking of which factors contribute most to their platform decisions, consumers value quality of care, insurance coverage, and familiarity. In general, PCPs easily cater to these more so than their competitors by being the only one to offer extensive, personalized care. But overall, their dominance is more so based on practicality rather than value. **Their position as the "provider to trust" is going to be hard to shake, but we cannot ignore the strong signals from our respondents pointing to the fact that the everyday healthcare landscape is evolving.**

Consumers, especially younger ones, are increasingly looking to move away from the primary care physician's office and towards more accessible, low cost options.

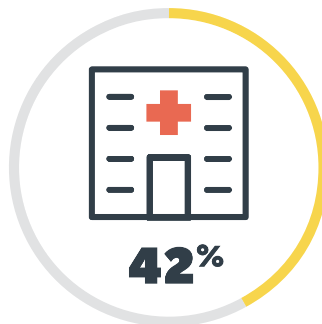
WHAT WE FOUND

After surveying 2,600 consumers between the ages of 18 to 80 about their preferences and usage of different healthcare providers, it became evident that as consumers age, they tend to hold on to their PCPs a little tighter. **85% of respondents said that they considered a PCP for care in the past six months, which is over 40% higher than those who considered urgent care facilities. Urgent care was the second most popular option at 42%, with emergency rooms coming in at third with 27%.** This huge difference in popularity could be attributed to the fact that PCPs vastly outnumber alternatives by thousands; there are 246,000 PCPs in the US as compared to only 7,600 urgent care clinics. Consumers find PCPs to be the most trustable and familiar provider, which directly aligns with their desired healthcare characteristics.

Platforms considered in the last 6 months



Considered a
Primary Care Physician



Considered an
Urgent Care

80% of consumers reported using a PCP in the past six months, with 59% visiting those facilities three or more times. When thinking about their most recent PCP visit, consumers said that they chose this option because of insurance coverage (61%), good quality of care (54%), and provider familiarity (53%). They rated their visits to these offices similarly, with insurance coverage (80%), quality of care (76%), and healthcare staff being their most attractive features.

WHY AGE MATTERS

To gain a better understanding of how the future of this industry may look, we decided to evaluate consumer responses by age. Though PCPs are still the most popular provider across all generations, it is evident that loyalty to primary care is eroding on account of a stark generational divide. Baby Boomers and the Silent Generation still consider PCPs to be the cream of the crop in terms of healthcare providers, and for good reason: their complex medical histories push them to go where they are known in order to avoid having to start from scratch with unfamiliar professionals. Younger consumers, on the other hand, are less likely to have an established PCP and are more apt to change doctors due to moves, employment, and insurance. Rather than familiarity and trust, these consumers value convenience, speed, and ease of access. This desire for streamlined care is threatening PCPs dominance and without improvement, they are opening the door for new alternatives to flourish.

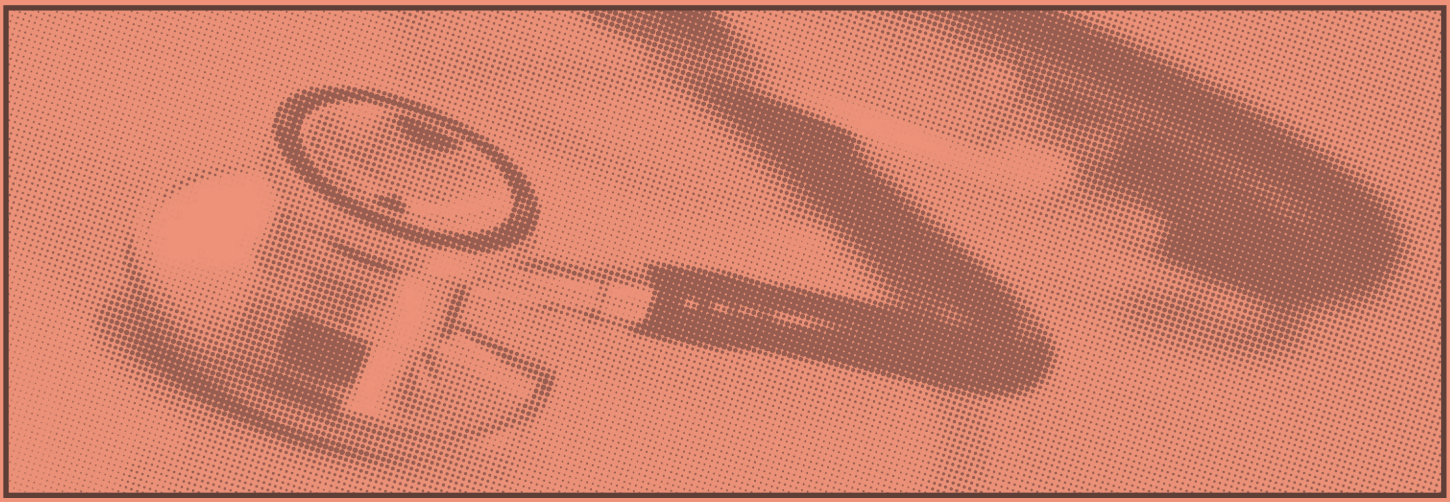
GEN Z (ages 18–22)

MILLENNIALS (ages 23–38)

GEN X (ages 39–54)

BABY BOOMERS (ages 55–73)

SILENT GEN (ages 73+)



WHAT CAN BE DONE

With urgent care and retail clinics beginning to offer PCPs some stiff competition, they need to work to improve their weakest areas: inconvenience and inefficiency. Respondents said that their top three reasons for not using a PCP were because it took too long to get an appointment, wait time at the doctor's office was onerous, and there is a lack of available walk-in care. Their competitors are thriving in these areas, but not all hope is lost; consumers are still interested in getting a wide range of services at their family doctors office, giving PCPs the opportunity to improve their service time while also implementing a menu of new services.

Consumers would rather choose PCPs for treatment of health conditions ranging from ear infections to skin disorders; solving sleep and weight problems in addition to other wellness concerns; and get specialty care, such as blood tests, allergy care, and even kidney dialysis. These specialty services paired with their established quality of care will prove useful if they begin putting the consumer first, stepping up their ease of access.

SO WHAT'S NEXT?

PCPs have high net promoter scores and an established market position, but they ultimately need to do a convenience and accessibility overhaul if they want to maintain their longstanding popularity. As younger consumers are beginning to become the industry's primary healthcare decision makers, PCPs must consider fundamental changes in order to satisfy their needs in order to gain their loyalty against rising alternatives. Providers that borrow from each other's strengths will find the most success, because let's face it: in today's transforming world, you must acclimate or be left behind.

So how do we translate consumer feedback into actionable insights? WD has the answers. To find out how we can help your brand adapt to this industry shift or to receive a full copy of our findings in *Healthcare: Who Survives?*, connect with healthcare industry expert Dan Stanek at dan.stanek@wdpartners.com.