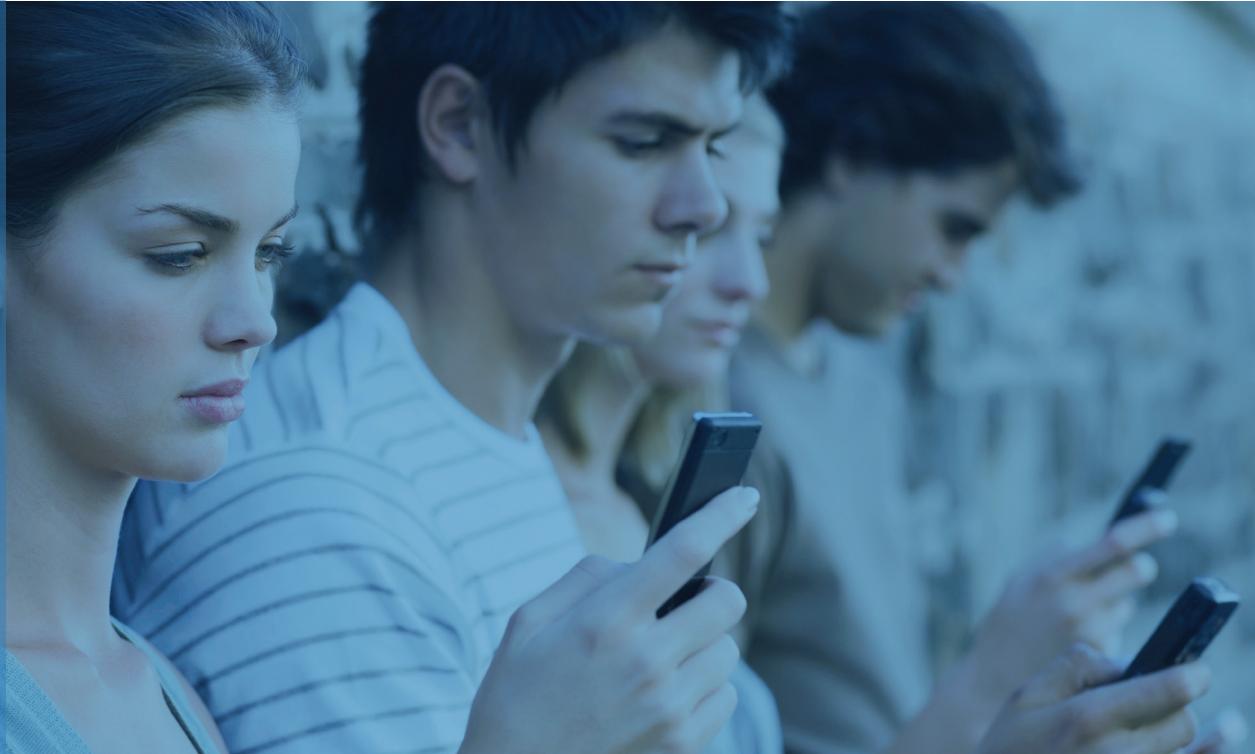




How Millennials are Redefining Healthcare Today: Are You Behind?



Understand the 4 keys to successfully reach and retain Millennials in your health system:

- How Millennials define health differently than previous generations
- How their reliance on social proof can help or hurt you
- Why a mobile strategy is essential to reaching them
- How to implement quickly and retain flexibility

MobileSmith

Introduction

The generation gap is nothing new to social and political culture, and neither is the lack of understanding from previous to oncoming generation. What is unique in today's context is the significance of the technological revolution and the speed with which it has transformed our environment. Four-in-ten Americans credit technology with improving life most in the past 50 years, well ahead of medicine and health,¹ and nearly half of Americans use digital voice assistants, mostly on their smartphones.²

While previous generations have and continue to adapt to this new frame of reference, it has shaped millennials and wired them differently from the outset. For digital adopters, technology is often viewed as a way to make existing processes faster, easier, more efficient. For digital natives,³ technology is the starting point - what can we make it do? As they age into the workforce and consumer market in increasingly-dominant proportions, millennials will fundamentally change the what, where, how and why.

As healthcare is undergoing its own technology revolution, it must be with an eye to the newest generation of patients and caregivers - a generation that is 79 million strong and now the largest population cohort.⁴ Understanding key drivers, like options and access to information, will be critical factors to success. As much of our interactions have moved to the digital sphere, healthcare will be no different; meeting this generation's needs means mobile education and engagement apps, BYOD patient monitoring, and telemedicine are the new and improved house call.

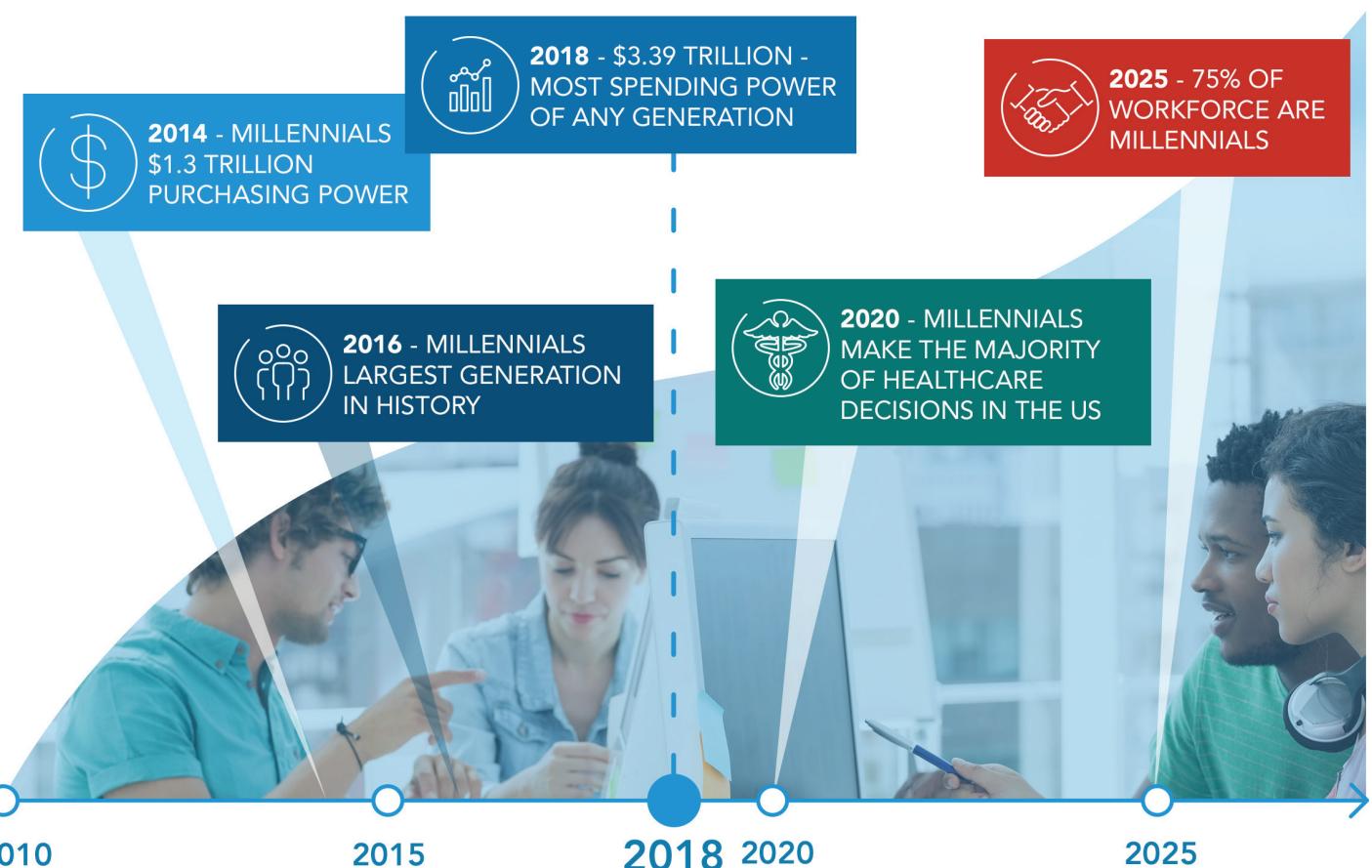


The Generational Shift

Generalizing millennials and their perspective on the world is challenging, as they are the largest and most diverse generation to date. Nearly 43% are non-white, and roughly 25% speak a language other than English at home.⁵ Coming of age during an era when technology superseded many traditional boundaries, both geographic and ideological, has fostered an openness and global awareness that makes them less cohesive in perspective.

This also makes them more inclined to challenge traditional structures and processes; having never known a world without technology, they don't accept historically-imposed limitations but intuitively expect technology to work for them. While previous generations refer to "disruptive" technology that undermines entire industries, millennials have only known innovation at the expense of what was; it's not disruption if it is simply the natural order of things. Without decades of experience using taxis, Uber represents progress rather than loss—simply going where the technology leads, more evolutionary than revolutionary and just as inevitable.

The natural skepticism and suspicion of traditional authorities or the way things were have earned millennials a host of stereotypes, painting them as uncaring or uninvolved, apathetic and looking for a shortcut. In reality they are more engaged and involved than previous generations, but like most other aspects it is highly peer-influenced and driven by a belief in social responsibility.^{6,7,8}



Millennials: A Generational Tsunami in Healthcare³²⁻³⁶

This socially inclusive view is reflective of their childhood; while much of the independence of Gen Xers may derive from growing up as latchkey children of working parents, many millennials are the products of helicopter parenting that escalated "harm prevention" to "risk elimination" and often restricted activities, while emphasizing participation and teamwork above competition and hierarchy. Consequently many see themselves as an intrinsic part of the whole, with an expectation to contribute and an obligation to leverage their strengths for good.

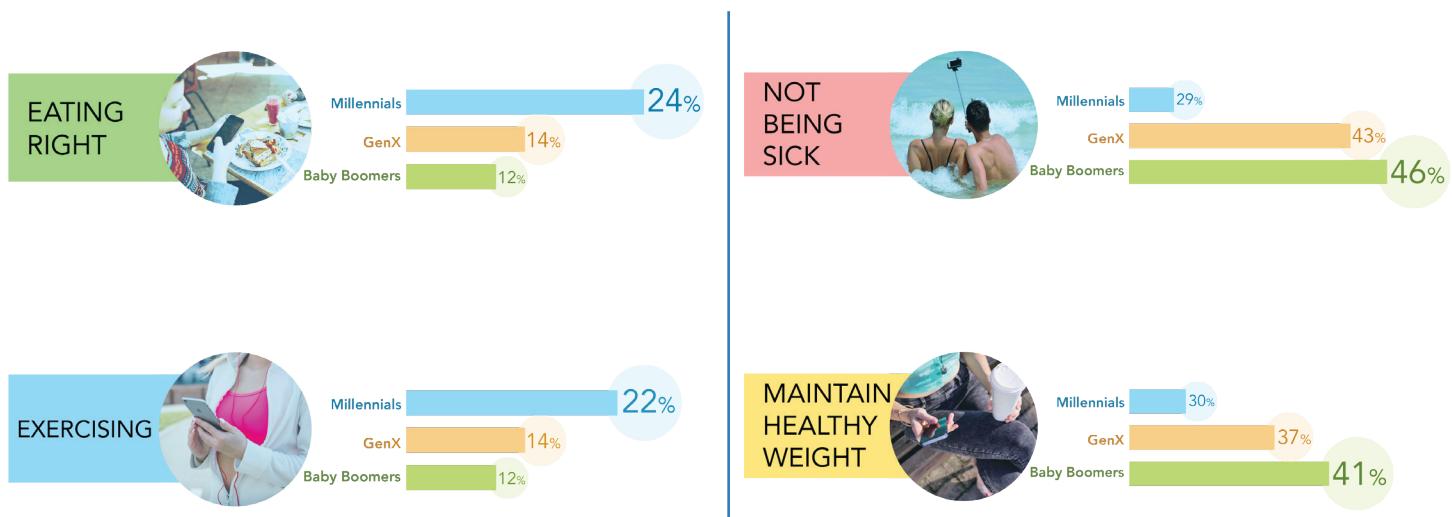
Being very social-responsive, Millennials also trust their peers above traditional sources of authority or wisdom - think Wikipedia over World Book. Online reviews and crowd-sourcing are often the primary means of making decisions, including selecting healthcare providers and determining the need for professional care. This means organizations need to successfully connect with the cohort as a whole to foster a positive reputation and build brand loyalty with individuals. While it may seem counterintuitive, the best way to reach the masses is to offer highly-personalized, digital experiences that offer access, immediacy, information, and collaboration.

Redefining Healthcare

With every generation, the perception of healthcare and medicine has adapted to keep up with technological advances and medical breakthroughs. From the paternal, doctor-knows-best of the Boomers generation to the more resource-driven care Gen Xers experienced with the accessibility of antibiotics, vaccines and medical procedures, the definition and expectations of healthcare continue to evolve. What is most distinct about the current shift, courtesy of Millennials, is that of holistic wellness driven by information.

A 2013 Aetna survey, "What's Your Healthy?",⁹ articulates this shift clearly; when asked to define their definition of healthy relative to other generations, Millennials answered significantly higher with regard to eating right and exercising and lower on not being sick or maintaining the right weight for your height.

How Generations Define "Healthy"⁹

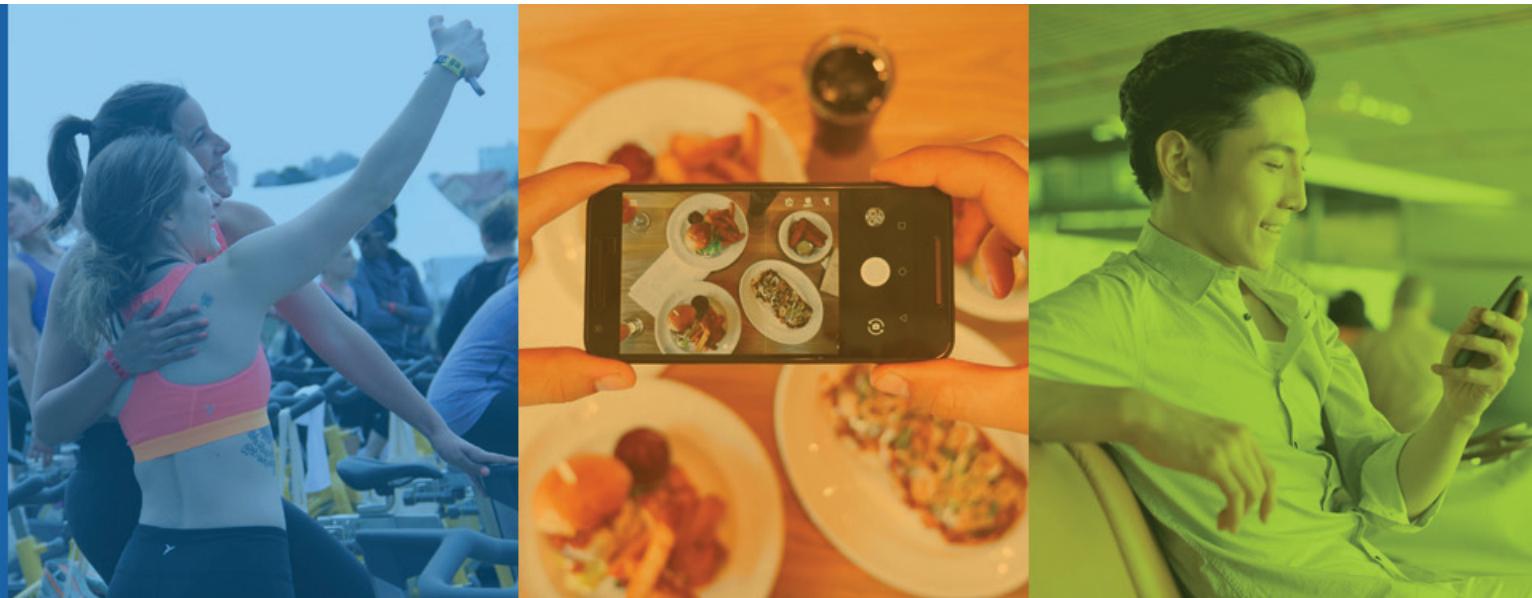


Health is an action, not a description, in this more preventative, proactive way of viewing health and less (treatment) is more. Factoring in current out-of-pocket medical costs at almost 30% of the total, Millennials will be resistant to unnecessary tests or potential treatments simply because it is standard operating procedure. The goal is to instead reduce the volume of treatment by way of improving and maintaining health, focusing on continual over episodic care, and being more intentional with issues of population health and chronic care.

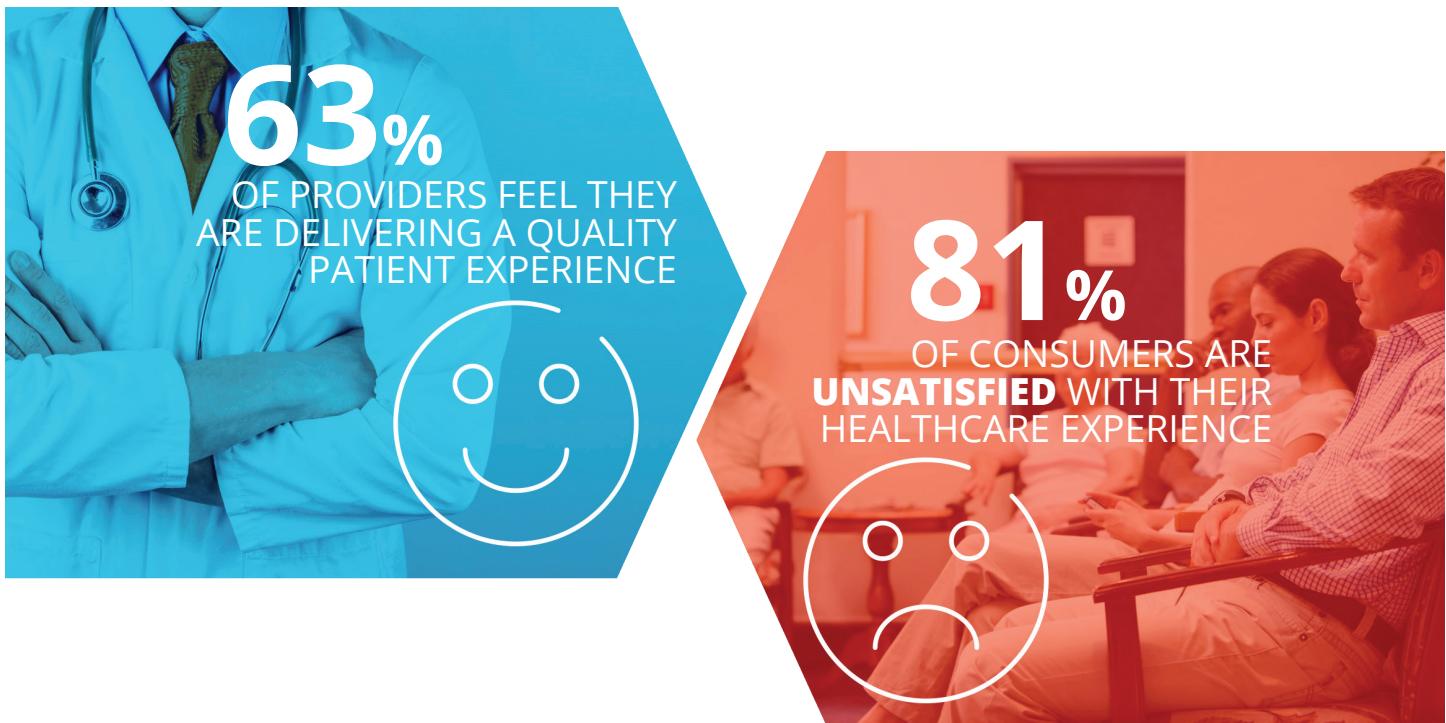
Underlying this approach is millennials' perception of healthcare as a last resort, rather than the first line of defense in their health and well-being. Ninety-three percent of Millennials don't schedule preventative visits¹⁰ and only visit a primary care physician (PCP) 61 percent of the time, significantly less than seniors (85 percent) and boomers (80 percent).¹¹ They have often seen their older family members endure significant strain due to extensive medical costs, and may even be part of the estimated 10 million millennial caregivers¹² that make up nearly a quarter of caregivers nationally.¹³ For many of these tasked with making critical decisions on their loved ones' behalf, they have little to no personal experience with serious illness or the nuances of insurance and the healthcare system. While the shift from fee-for-services to value-based care is a step in the right direction, the sheer scale of the transition will be a slow one and the lack of trust in the system has put healthcare on the defensive.

In the near term, healthcare systems must instead engage millennials and actively solicit their business much like a retail counterpart would. The value proposition of any healthcare service is being measured against a consumable culture empowered by technology, where someone is ready to provide a meal, a ride, or a weekend getaway with the click of an app. Even security-critical services like transferring bank funds, checking in for a flight and opening your hotel room door can be done with the expediency of an app.

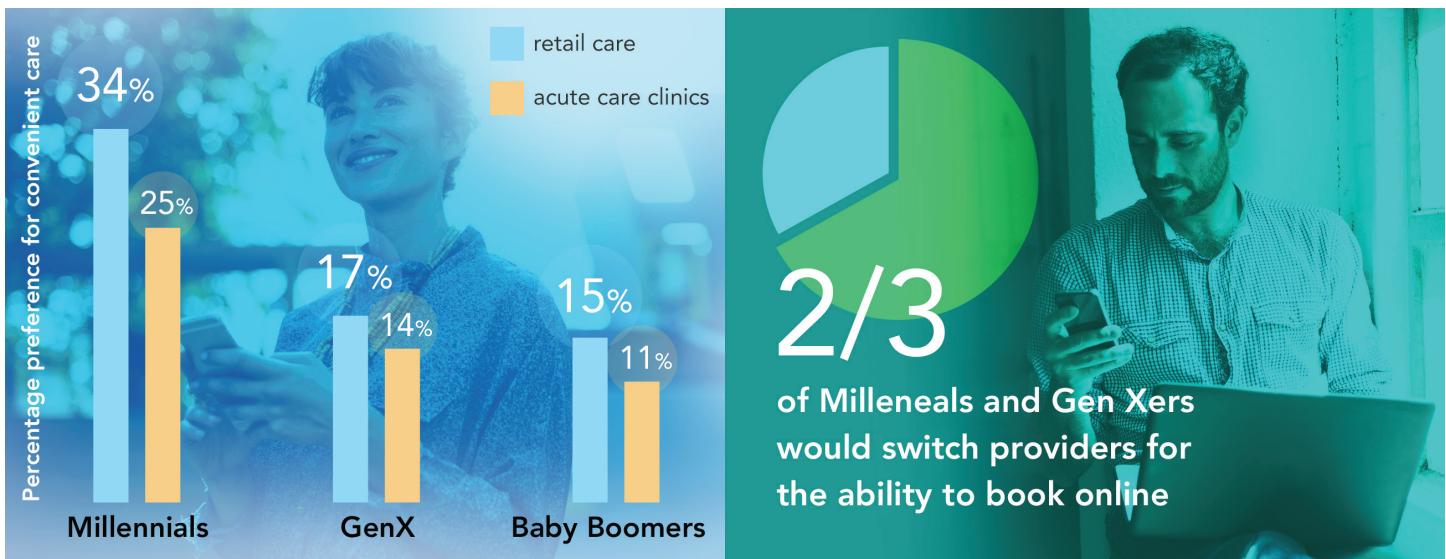
Health-conscious consumers are already tracking their steps, their food and water intake, their sleep and even their weight loss. With the elimination of the individual mandate, many Millennials will rely more heavily on commoditized care and retail options, and the retail competitors are investing heavily to maximize that trend by leading with a consumer-quality mobile experience. Healthcare must work with the technology and offer an integrated experience to meet the increased expectations of today's consumers and be better positioned to take advantage of future technologies, like Alexa or Watson.



The Millennial Prescription: Mobile



Consider that 81% of consumers are unsatisfied with their healthcare experience, yet 63% of providers feel they are delivering a quality patient experience.¹⁴ As a result, alternatives are quickly gaining traction. Research shows millennials prefer retail (34 percent) and acute care clinics (25 percent) at a rate double that of Boomers (17 and 14 percent respectively) and seniors (15 and 11 percent respectively).¹⁵ It's clear that the solution for healthcare is convenience, access, flexibility, and most importantly, communication. Seventy-eight percent of consumers want access to virtual health services,¹⁶ and nearly two-thirds of both Gen Xers and millennials said that they would be willing to switch providers for the ability to book online.¹⁷ This reinforces technology as a baseline expectation, as millennials view themselves as part of the solution and not merely recipients of care.



Part of this change in attitude and delivery stems from access to copious amounts of data; medical research is just a click away, and 73% of all U.S. adults use the internet for health and wellness.¹⁸ Of those, more than one in three are looking up information about health conditions or symptoms. One in 20 Google searches are for health-related information.¹⁹ Because millennials are high-information consumers, they consume extensive research and will be very well-informed but overwhelmed by discerning which information to focus on—the key is to offer well-vetted, medically-sound data in a format they can consume like a mobile app. This works for them as the patient or the caregiver, educating and advising in a technologically intuitive way, and establishes you as the expert with medically-sound, evidence-based guidance on their healthcare journey.

The need for mobile apps will continue to grow as millennials seek to manage their own care and that of their families and loved ones. A joint survey from Salesforce and Harris Poll found 71 percent of millennial patients would like to have their providers use mobile apps to book appointments, share health data and manage preventive care.²⁰ The always-present nature of smartphones gives apps an unprecedented mobility; critical reference, discharge, or situation-specific instructions are always at hand for immediate reference. These apps help not only the patients but the increasingly-millennial hospital staff as well; a recent New England Journal of Medicine study found that nearly every industry sector saw labor productivity gains in the past 20 years with the glaring exception of healthcare.²¹

Utilizing technology like mobile apps presents the opportunity to communicate in an intuitive way and create a two-way channel from which you can learn what is most important to your patients. For many millennials, the experience matters more than the numbers, and customer service more than the quality of clinical care.²² Their time factors heavily into their assessment of value, and empowering them to own their health is enormously valuable to building a relationship and sense of loyalty. Once that authenticity and social proof is established, millennials may in fact be the most brand-loyal generation²³ and American millennials are 7 times more likely to give their personal information to a trusted brand than to any other brand.²⁴

Because they trust technology implicitly, mobile apps are also an ideal way to extend the continuum of care for millennials, speaking to their desire for digital options and comprehensive health. Nearly half (42%) of patients would be more likely to follow their prescribed treatment plans if they received encouragement and coaching from their doctors between visits,²⁵ and advances in wearables and devices indicates significant growth in remote-patient monitoring. By 2021, Berg Insight projects 50.2 million patients will be monitored from home annually, with BYOD connectivity preferences accounting for 22.9 million of those being monitored using patients' own mobile devices as health hubs.²⁶

While a broader digital strategy is necessary for any health system, mobile apps are no longer an optional component or add-on. As digital consumption overall has grown, mobile has markedly outpaced desktop: digital media time spent on desktop has dropped 8 percent since 2013, while on smartphones it grew by 99 percent and tablets 26 percent.²⁷ Even more significant is the breakdown for mobile devices themselves, with 87 percent of time spent in mobile apps versus only 13 percent on mobile web.²⁸



Think Big, Start Small, Act Fast

With so many changes hitting healthcare concurrently, many hospitals and care facilities are in a position of playing catch-up. There are several strategies that can be implemented quickly to establish a mobile presence and begin engaging with patients to refine and iterate on feedback. Key to this is releasing your IT team from the burden of building, owning, and updating all mobile content. A digital governance committee is an ideal solution for bringing together stakeholders from across the organization and distributing key roles more appropriately, including marketing, service lines, patient experience and innovation.

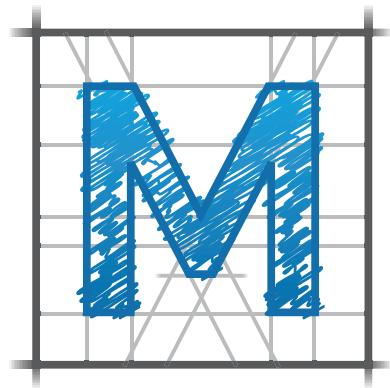
Also critical is taking the easy win—identify where in your organization mobile is a no-brainer and start there. For many hospitals and healthcare systems, a pregnancy app is an ideal candidate for this. This year 82 percent of births will be to Millennial moms, giving an app a built-in audience of 1 million information-seeking, mobile-savvy mothers per year.²⁹ In addition, this is often the first major healthcare choice for young families, who are looking to grow with a healthcare system as their child grows. With the lifetime estimated value of a new patient at \$600,000³⁰ and women making 80 percent of the healthcare choices for their families,³¹ a pregnancy app is tailor-made for engaging new parents and engaging with them through a continuum of pediatric, wellness, perioperative, and chronic care apps along their healthcare journey.

MobileSmith is changing healthcare one app at a time, bringing that consumer-level mobile experience to healthcare with a suite of pre-built, ROI-generating apps that engage today's health-oriented patients. These Blueprints offer a quick turnaround with minimal staff time to implement while addressing many of the key pain points for healthcare systems today, including preventable readmissions, adherence, throughput, and chronic care. MobileSmith health app Blueprints offer the mobile-first experience millennials are seeking connected by an interoperability platform that leverages your existing healthcare infrastructure. Simply put, these health app Blueprints are a bridge to the future, available today.

To build the healthcare system of the future, we need to build it for the future. With Millennials quickly filling many of the key decision-making roles—parents, caregivers, and workplace executives—healthcare services must be structured around these priorities of efficient, holistic care, consumer-grade patient experience, and convenient, informative digital options. This is a marked challenge for traditional healthcare systems and processes, but the potential upsides are significant with better outcomes, better data collection and analysis, and better care on the table.

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