

MILLENNIAL HEALTHCARE EXPLORATORY

APRIL 2018



ABOUT THIS STUDY: SAMPLE AND METHODOLOGY



30-MINUTE QUALITATIVE ONLINE INTERVIEW

with Quester's artificial intelligence-
driven moderator



450 PEOPLE SURVEYED

(ages 22 – 35) with equal
representation among the following
groups:

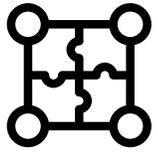
- Females with and without kids
- Males with and without kids



Respondents self-identify as
practicing preventative care



ABOUT OUR DATA ANALYSIS



Quester uses proprietary software and linguistic analysts to conduct an in-depth analysis across the rich responses gathered through the artificial intelligence-driven moderator.



Linguists examine the structure, content and context of all stories to identify key ideas and at times deeper, hidden meanings.



Where applicable, Quester will quantify the key ideas to help provide prevalence and confidence of the insights identified.



WHAT TO KNOW ABOUT THESE MILLENNIALS

86% have negative associations with pharmaceutical companies and 75% with healthcare.

They've lost trust and see them as a "necessary evil" when it comes to dealing with their health and wellness

Millennials feel they can't afford proper healthcare, even with insurance, so this puts them in a tough situation

This is further exacerbated for Millennials who don't have health insurance



Millennials understand that preventive care is about *taking care of yourself* before something happens

“ When I think about preventive care I think about a healthy lifestyle, including exercise, community, good diet and structure. *Taking care of oneself as best as possible.* ”

There are two areas in mind when thinking about their preventive care. They hope to prevent both ...



LONG-TERM DISEASE



SHORT-TERM ILLNESS

While the severities and consequences of each vary wildly, from a common cold to cancer, they both stand in the way of Millennial's ultimate goal ...

Living a happy, healthy life



Millennials are trying to prevent common long-term diseases

The goal is to slow down the aging process to live a longer, happier, healthier life

“

... So I can live longer. I want to be *healthy* and *happy* and *active*. And watch my children, grandchildren and *great grandchildren* grow.

”



Diseases or conditions they're more susceptible to are most top of mind, especially ones that run in their family

Seeing loved ones suffer motivates some to be proactive in their lifestyle choices

“

Cancer, heart disease, anxiety. Studies show that as you get older you are *more prone to those problems*. I'm just trying to get a *jump start in leading a healthy lifestyle*.

There is a *long line of health issues in my family*. I'm working to avoid continuing the line. I don't want to *struggle* the way I've seen my mom and grandma struggle.

”



33%

HEART DISEASE



26%

DIABETES



18%

OBESITY



18%

CANCER



10%

MENTAL HEALTH

Preventing short term illness is important to Millennials because they don't want to disrupt their busy lives



35%
SHORT-TERM ILLNESS

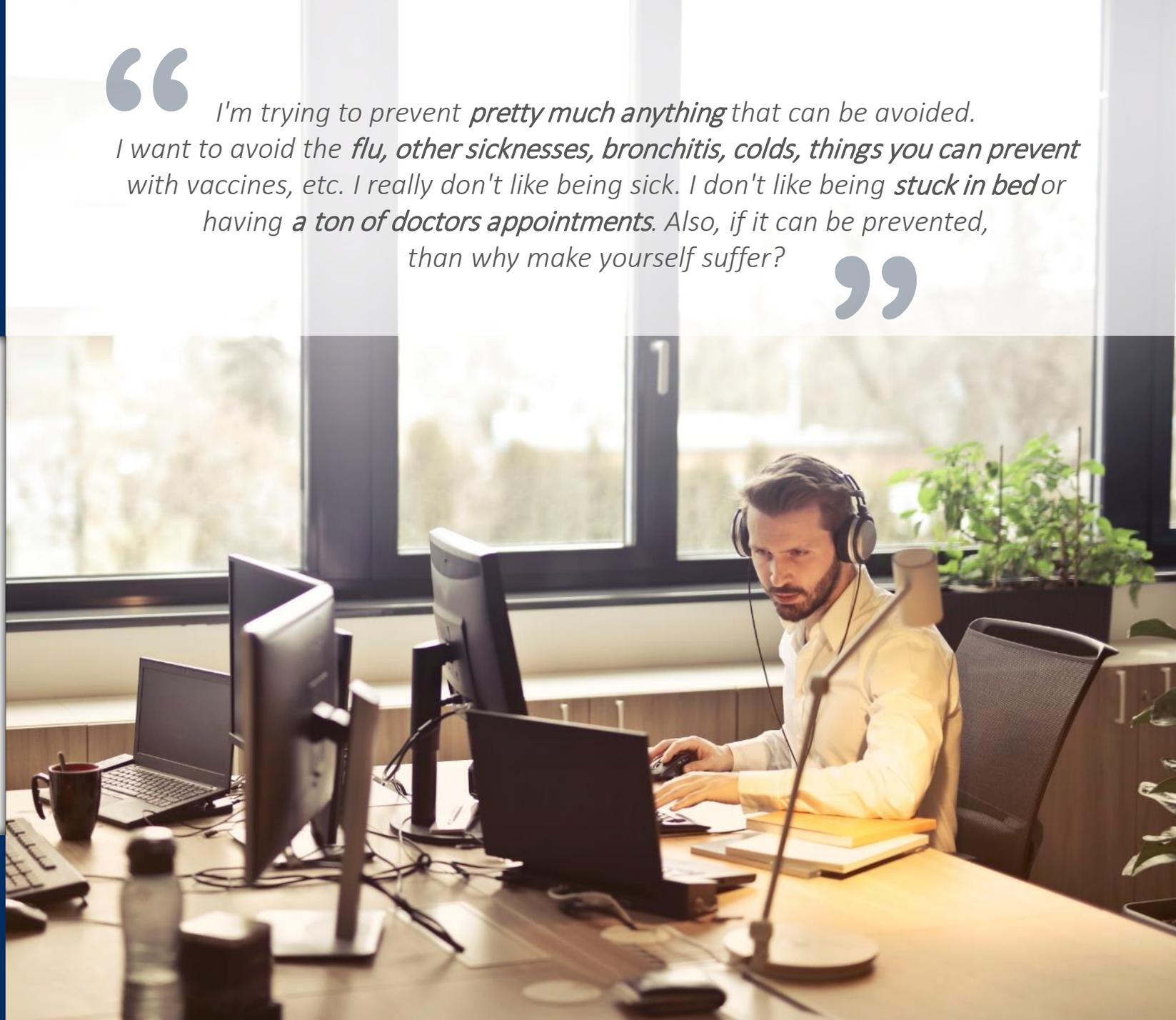
Flu
Common Cold
Viruses
General Illness

HYPOTHESIS: Poor perceptions of healthcare/ pharma companies may reinforce Millennials to choose to *not* seek medical care for short-term illnesses

“

I'm trying to prevent pretty much anything that can be avoided. I want to avoid the flu, other sicknesses, bronchitis, colds, things you can prevent with vaccines, etc. I really don't like being sick. I don't like being stuck in bed or having a ton of doctors appointments. Also, if it can be prevented, than why make yourself suffer?

”



When it comes to the most important preventive care step, a healthy diet rises to the top



45% DIET

Eating a healthy, balanced diet with fewer bad foods (sugar, fat, sodium, processed) and more nutritious options (fruits, veggies)



27% EXERCISE

Staying physically active and in shape; getting heart rate up; stretching



22% REGULAR DOCTOR VISITS

Seeing doctors for check-ups, physicals, vaccines; having appropriate tests run; regular dental, vision, and OB/GYN appointments



11% PRACTICE PROPER HYGIENE

Washing hands, using hand sanitizer, cleaning/disinfecting your home



11% KNOWLEDGE AND LIFESTYLE

Understanding how things affect you (especially food) and knowing how to take care of yourself; requires self awareness



9% MENTAL HEALTH MANAGEMENT

Keeping your mind healthy; limiting stress and knowing how to cope before things get worse; getting enough sleep



8% TAKE MEDICATION

Taking prescribed medication daily and on time for specific conditions



7% TAKE VITAMINS/SUPPLEMENTS

Taking vitamins/supplements regularly; tied to both short term (immune system support) and long term goals (prevent cancer)

Practicing preventive care gives Millennials a sense of control over their immediate and long term health

Millennials are taking the steps to ensure the healthy future they desire

Some even feel taking care of themselves is the one thing they can control in their lives



“

This makes me feel in control of my destiny or, at a minimum should something happen in the future, I know I have done everything I could to prevent it.

”

So where do the professionals fit into Millennials' preventive care?



To understand how Healthcare and Pharmaceutical Companies fit into Millennials' preventive care practices, it's important to know *how they feel* about them

HEALTHCARE

75% Feel Negatively

Millennials associate healthcare with the high cost and access, or lack thereof, to health insurance

Doctors **Necessary**
Expensive Healthy
Helpful Preventive Complicated

PHARMACEUTICAL COMPANIES

86% Feel Negatively

Millennials have strong feelings towards these companies; they see them as profit-driven, not patient-driven

Greedy Profits **Helpful**
Corrupt Expensive
Horrible Untrustworthy **Medicine**

“ I think that it is very *necessary* and that everyone should have it. I do think that there is *corruption in our healthcare* situation in many ways. Prices are too high. Companies are raising the cost for procedures. It is becoming *very unmanageable*.

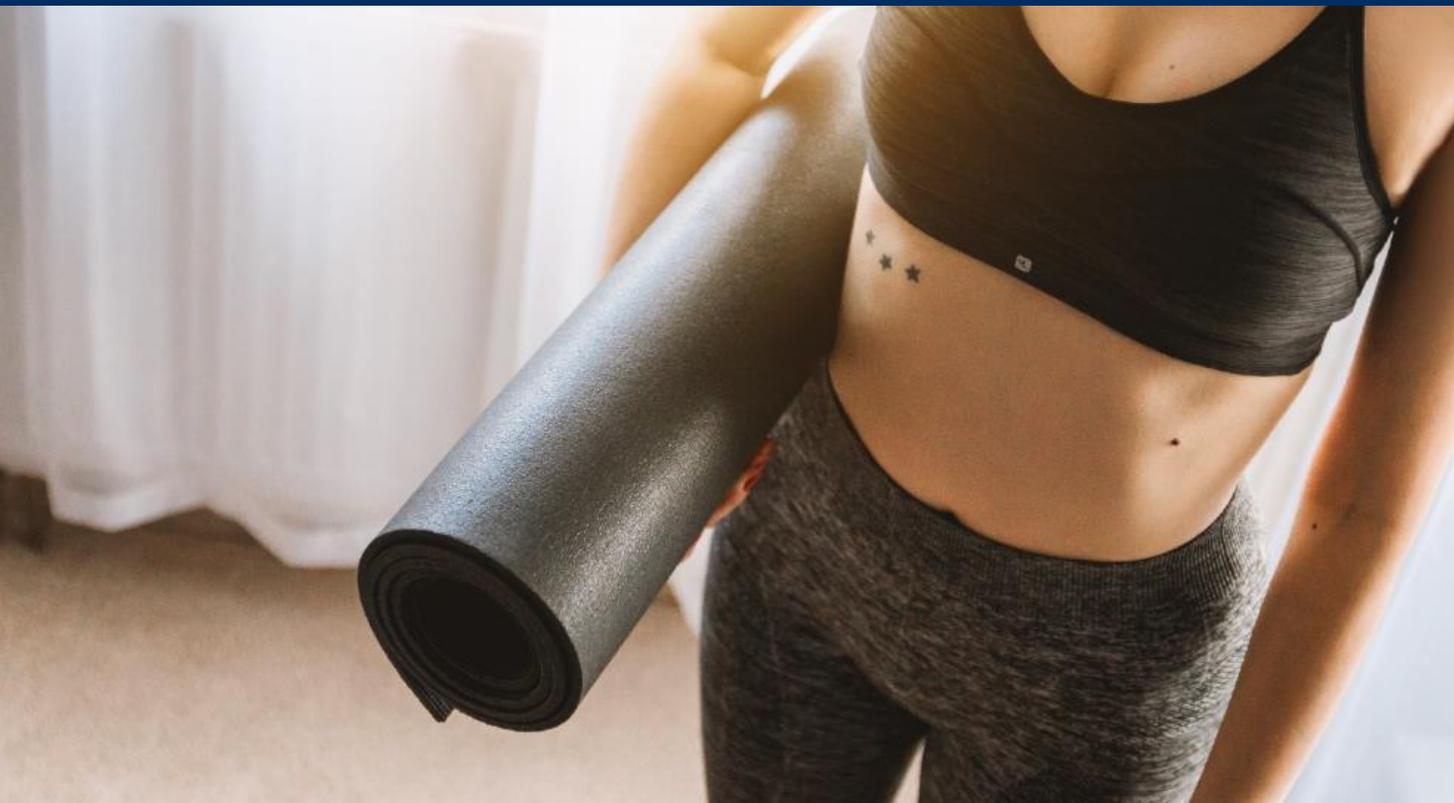
I think of the shining example of *corporate greed* with *no moral high ground*. They have *too much power* in this country and are the biggest *drug dealers* in the world and probably the *most dangerous*.

”

Poor perceptions of Healthcare and Pharmaceuticals has led to a lack of trust

This distrust drives Millennials to take their preventive care into their own hands. For some, this means actually avoiding the professionals

Instead, they focus on a **healthy lifestyle, home remedies, and education**



“

*They make me feel like it is **me against them** instead of a team. **They don't care to keep me healthy** or to make me healthy, they just care about **making a profit out of me.***

*I try not to use them, honestly. I try to **learn as much as possible** about my personal health from reputable sources and **use preventive care.** The healthcare and pharmaceutical companies **scare me into working harder at being healthy** so I don't have to use them.*

*I try to make as many **healthy choices in my lifestyle** to **prevent sickness and health conditions.** However, if I have sickness that will not go away on its own or through healthier options, such as **home remedies,** then I will go to the doctor.*

”

Understanding the Emergence of CAM: Complementary and Alternative Medicine

CAM is the popular term for health and wellness therapies that have typically not been part of conventional Western medicine

Complementary = treatments that are used **along with** conventional medicine

Alternative = treatments used **in place of** conventional medicine

Estimated **59 million people** had at least 1 CAM expenditure in 2012

Resulting in **\$30.2 billion** in out-of-pocket expenditures

And **9.2%** of all out-of-pocket spending

Expenditures on Complementary Health Approaches: United States, 2012. National Health Statistics Report 6/22/16

<https://www.cdc.gov/nchs/data/nhsr/nhsr095.pdf>



Lower income average spend: **\$435**

Higher income average spend: **\$590**

What CAM looks like with the Millennials in this study ...

SPECIFIC FOODS

- Apple Cider Vinegar
- Fermented Foods
- Fresh Garlic
- Fresh Turmeric
- Tea/Detox Tea

DIETS

- Intermittent Fasting
- Low Oxalate Diet
- Paleo
- Plant-Based
- Vegan
- Vegetarian

SUPPLEMENTS

- Elderberry syrup & juice
- Fish Oil
- “Herbal Remedies”
- Milk Thistle
- Probiotics
- Taurine
- “Vitamins” – C, D, B Complex, Multivitamins

SERVICES

- Acupuncture
- Chiropractic care
- Hypnosis
- Massage Therapy
- Therapy

ACTIVITY

- Deep Breathing
- Meditation
- Qi Gong
- Yoga

OTHER

- “All Natural Soap”
- Binaural Beats
- Essential Oils
- Healing Crystals
- Medical Cannabis
- Religion/Spirituality



They see a connection between their whole body health and lifestyle choices. It’s less about treating symptoms and more about understanding the underlying cause, then treating with alternative approaches before using modern medicine, like pills

This idea of whole body health also means being mentally healthy as much as it does physically. For some, this is simply about stress management, but others are treating mental health conditions like anxiety, depression, and PTSD

Some are using CAM methods and may not understand it. Vitamins and supplements have not been proven effective in a compelling way, yet they are a part of **23% of Millennials** preventive care practices

Millennials are in a unique position to take control of their health after the healthcare and pharmaceutical companies have failed them

“

My parents didn't do any preventive care. They'd have health issues and then just go to the doctor and get medicated for it. Me doing preventive care at all is different from them.

”



Because of medical and technological advancements, Millennials have access to endless amounts of information, considerably more than past generations ever had at their age

This makes them more equipped to manage their own health, encouraging a less reactionary approach like past generations

It further opens the door for more conversion to CAM practices

It makes sense Millennials need to feel in control of their preventive care — they've grown to not trust the institutions that are supposed to help them



So what do Millennials want to make preventive care easier?

AFFORDABILITY: Lower cost preventive care or more inclusive coverage

CONVENIENCE: Need more time/help with busy schedule, less hassle

MOTIVATION: Lack motivation to practice proper preventive care, like working out and planning healthy meals

PERSONALIZATION: More help with what's best *for them* based on lifestyle and genetics; professionals who build patient relationships

EDUCATION: Whether it's a government or healthcare initiative, Millennials recognize the need for information on how to live a healthy lifestyle

A VIABLE HEALTHCARE SYSTEM: Want to be treated as a human – not a \$. In the current environment, Millennials have lost trust so they focus on alternatives that address this disconnect

MENTAL HEALTH SUPPORT: More support; better means of diagnosing conditions; offer mental health days