

2024 DIRECT PRIMARY CARE

OVERVIEW

This brief presents the key findings from the 2024 Direct Primary Care (DPC) Study. The primary purpose of this study was to better understand respondents' satisfaction, practice characteristics, and attitudes toward the DPC practice model.

KEY FINDINGS

DPC Practice Characteristics and Patient Panel

- Most of the respondents described their DPC practices as a full DPC (84%), which is lower than in 2022 (90%) but similar to 2018 (80%) and 2019 (84%) findings.
- A small percentage of DPC practices (9%) still incorporate a fee-for-service billing to a third-party which is typically a separate panel.
- The average current patient panel size is 402 patients.
- When looking at the age categories represented in DPC's patient panel, two-thirds are between ages 19 to 64 (62%) while the remaining are less than 18 years old (14%) or older than 65 (20%)
- Three-fourths (76%) worked independently when they opened their DPC practice while 16% worked with other physicians and 8% had no role in the opening.
- The primary driver of opening a DPC practice was the potential to provide better care (97%).
- The two major concerns of opening a DPC practice were capital/cash flow (54%) and membership recruitment (50%).

Pricing and Fee

- Monthly membership fees were in the range of \$20 to \$49 for children and \$50 to \$100 for adults (65 years or younger). Monthly membership fees for families were \$100 or higher.
- Over half (62%) charge an enrollment fee and 7% charge per visit fee.

Procedures and Services Provided

- The three most popular procedures provided in DPC practices are EKG (85%), suturing (77%), and biopsy & excisions (67%).
- Most DPC practices provide the following services as part of the membership fee: same day appointments (98%), phone/text/consults (98%), and telemedicine (98%).
- The following three services are also part of the membership fee: nutritional counseling (82%), weight management (80%), and urgent care/walk-in appointments (80%).

Patient Encounters

- On average, respondents have a total of 41 patient encounters per week. Most are seen in the office setting (27 per week) or e-visits (11 per week).
- The vast majority of DPC practices have implemented a patient communication platform (81%).

Employer Engagement

- Two-thirds of DPC practices (63%) participate in signed or formal employer-based contracts.
- Most contracts offer the same bundle of services (71%) while one-fourth (28%) customize their contracts based on the employers' needs.
- One-fourth (24%) employers require data as part of the contract, which is down from 32% in 2019.

Impact of Practicing Medicine in a DPC Practice Setting

- Most respondents indicated that practicing in a DPC model has had a positive impact on practicing medicine. For instance, virtually all respondents (98%) felt the quality of care provided to patients is better practicing in a DPC practice.
- Furthermore, the following three factors have also improved to the better when practicing in a DPC practice: physician's overall satisfaction level (personal and professional) (97%), the ability to practice medicine (97%) and the relationship with patients (94%).

Burnout and Practice Satisfaction

- When looking at the level of burnout, physicians working in a DPC practice were more likely to indicate no level of burnout than those not working in a DPC practice (49% versus 14%, respectively).
- Among those experiencing burnout, 12% working in a DPC practice cited feelings of burnout while half not working in a DPC practice (46%) cited feelings of burnout at once per week or most days.
- Nearly all respondents working in a DPC practice (94%) indicated they were satisfied with their overall practice, which is significantly higher than those not practicing in a DPC practice (57%).

DPC Familiarity and Interest

- Among those who are not currently practicing in a DPC practice, one-fourth (27%) are familiar with the DPC model and not interested in transforming to a DPC practice, which is down from 38% in 2022.
- Nearly three in 10 (27%) are familiar with the DPC model but are still learning about it.

About the 2024 American Academy of Family Physician Direct Primary Care (DPC) Study

The Direct Primary Care (DPC) Study has been conducted in one form or another, in 2018, 2019, 2022 and 2024. The 2024 DPC survey was emailed to the following two audiences: 1) family physicians who are currently practicing in a DPC practice or interested in transforming to a DPC practice and 2) a random sample of AAFP members. A total of 374 surveys were received and 177 (47%) were currently practicing in a DPC practice.