"On-demand" care is the front door to
Percentage of consumers "highly loyal" for an illness like the flu
Likelihood of using newer sites of care (flu, cold, or similar illness)

But your patients likely aren't loyal.
patients' loyalty to their personal physicians.
for many health system goals hangs on
Downstream referrals, care coordination,
Ongoing primary care

WHAT IT COVERS
Urgent, episodic care
(flu, cold, or similar illness)

WHY NOW?
"On-demand" care is the front door to
the health system—and consumers
have many new options.
Likelihood of using newer sites of care
for an illness like the flu

56% of consumers would consider using retail clinics
42% of consumers would consider using email visits

Stop blaming your competitor.
If the top 20 scenarios most likely to
prompt a consumer to switch PCPs, 17 were associated with
missteps and current PCP could make, rather than
attributes that a new PCP in the market could offer.

Preference for Service Location
Rank of Clinic Attributes

1. Access and Convenience
2. Provider Continuity
3. Provider Credentials

Clinic near errands or work? They'd rather meet you online.
Respondents preferred email visits over a clinic near errands or one near work.

Don’t rely on your brand.
Respondents ranked attributes related to
reputation unexpectedly low. The
highest ranking reputation attribute,
affiliation with the best hospital in the area,
ranked 19th, and affiliation with a
university hospital ranked 34th.

WHAT IT COVERS
Ongoing primary care

WHY NOW?
Downstream referrals, care coordination,
and disease management—success
for many health system goals hangs on
Downstream referrals, care coordination,
Ongoing primary care

Percentage of consumers “highly loyal”
53% of consumers are highly
likely to stay with their PCP over the next 12 months
36% of consumers are highly
likely to recommend their
PCP to a friend or relative

Stop blaming your competitor.
If the top 20 scenarios most likely to
prompt a consumer to switch PCPs, 17 were associated with
missteps and current PCP could make, rather than
attributes that a new PCP in the market could offer.

Top 20 Scenarios Prompting
PCP Switch by Scenario Type

Manners beat credentials.
Current patients care more about
how they are treated than by whom:
Don’t rely on your brand.
Respondents ranked attributes related to
reputation unexpectedly low. The
highest ranking reputation attribute,
affiliation with the best hospital in the area,
ranked 19th, and affiliation with a
university hospital ranked 34th.

WHAT IT COVERS
Self-referred specialty care across
16 disciplines

WHY NOW?
While physician referrals remain the primary
driver of specialty volumes, self-referrals
also represent a healthy portion of the
business and can be substantial to your
business and can be substantial to your

Distance is a major driver.
Short travel distance was the most
frequently cited consideration when
choosing a specialist, but few consumers
cited it as their top decision driver.

Percentage of Consumers Citing Distance as Factor
1. 42% of consumers said distance was in their
top three reasons for choosing a specialist
but only...
2. 11% of consumers said distance was their
number one reason for choosing a specialist

Does affiliation matter?
Depending on the specialty.
Patients rank hospital affiliation as the
third most important driver in their
specialist selection. However, affiliation is
particularly important in some specialties
and not at all important in others.

Percentage of Consumers Citing Affiliation as #1 Driver by Specialty

Care quality dictates
decision to return.
Want to guarantee your patients will
return? Focus on care quality. Among
patients who had a strong opinion—
positive or negative—about whether
they would return, care quality was the
make-or-break factor.

Percentage of Consumers Citing Care Quality as #1 Driver

36% of Dissenters said “Quality of Care" was
the most important factor in why they
would not return
43% of Dissenters said “Quality of Care" was
the most important factor in why they
would not return

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