

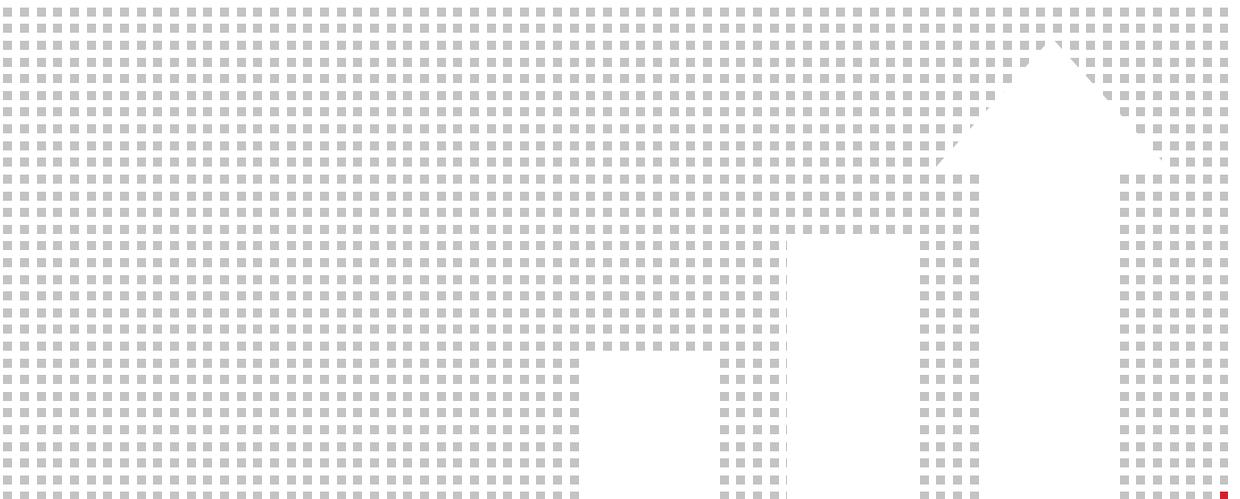


Marketing and Planning
Leadership Council

RESEARCH BRIEFING

What Drives **Consumer Loyalty** to a Primary Care Physician?

12 Insights from the Primary Care Physician Consumer Loyalty Survey



Health system success hangs on a patient's loyalty to their PCP.

Primary care physicians (PCPs) orchestrate referrals, coordinate care, and manage disease. They can influence where a patient receives care, and whether they need care at all.

Success for many health system goals, therefore, depends heavily on consistent patient-PCP relationships.

But with so many new care options available—retail clinics, virtual visits, new physician practices—patient loyalty isn't a guarantee or even the norm any longer. So how can PCPs attract and keep patients in an era of consumer choice? The answer might surprise you.

We asked nearly **2,000 consumers** about their loyalty to their PCP.

Survey Methodology

We surveyed 1,843 patients who had a primary care physician visit in the last 12 months. Three questions we wanted to answer:

1 Which PCP characteristics are correlated with loyalty?

We asked respondents to characterize their loyalty to their current PCP using a variety of loyalty measures—their likelihood to stay with the practice, to follow their physician to a new practice, and to recommend the practice to a friend.

We also asked them about the practice's characteristics. For example, how fast can they get an appointment for a non-urgent visit? How much time does their physician spend with them during the visit?

2 What are the scenarios that would PUSH a consumer to actively seek out a new PCP?

and

3 What are the scenarios that would PULL a consumer to try a different PCP, even if they were satisfied with their current PCP?

To answer these questions, we asked respondents to make trade-offs across 48 hypothetical scenarios by telling us which would make them most likely to switch PCPs and least likely to switch PCPs. The 48 scenarios referred to either negative changes to their current PCP's practice (21 "push" scenarios) or positive characteristics of a hypothetical new PCP practice in their area that accepts their insurance (27 "pull" scenarios).

Unlike many other surveys, which allow respondents to rate all scenarios as "important," our MaxDiff conjoint methodology asked participants to make trade-offs among the 48 scenarios, providing insight into the relative likelihood of each scenario to prompt a consumer to switch PCPs. We showed respondents multiple sets of scenarios, pertaining to either their own PCP or a new PCP. Within each set, we asked them to choose which scenario was "most likely to make them switch PCPs" and which scenario was "least likely to make them switch PCPs." Each scenario was presented three times, resulting in a ranked list of utility scores indicating the relative likelihood of each scenario to prompt a switch.

Scenarios that PUSH Consumer to Seek Out New PCP

What if your current PCP...

Access and Convenience

- Reduced clinic hours
- Increased time to first available appointment
- Increased travel time to office
- Increased wait time at appointment

Cost

- Dropped your insurance
- Increased yearly costs

Doctor-Patient Relationship

- Made you feel confused about your illness/treatment
- Was rude or impatient
- Reduced time spent during visit

Quality

- Made a medical error

Service

- Had you see the first available PCP rather than him/her
- Had you see an Advanced Practitioner (AP) rather than him/her
- Had staff that were rude or impatient

Reputation

- Changed affiliation to another hospital
- Received negative publicity
- Received negative online reviews
- Provided your friend/relative with a negative experience

Scenarios that PULL Consumers to Try New PCPs

What if a new PCP practice offered...

- Extended hours
- Same-/next-day appointments
- Closer office location
- Guaranteed short wait time at appointment
- Ancillaries onsite
- Co-located specialty services
- Virtual visits
- Online portal
- Online appointment scheduling

- No out-of-pocket costs
- Price transparency

- Excellent patient education
- Physicians known for respecting patients
- Guarantee of 20+ minute visit

- Higher clinic quality scores

- Guarantee of always seeing the same physician
- Guarantee of always being treated by a physician (instead of AP)
- Staff known for excellent customer service

- Affiliation with the perceived best hospital in the area
- Excellent reviews online
- Higher patient satisfaction scores
- Recommendation from your friend/relative

12 Insights from the Primary Care Physician Consumer Loyalty Survey

We'll start with a look at which **PCP characteristics are correlated with loyalty.**

- 01 Most patients aren't loyal.
- 02 A little trust, patience, and respect go a long way.

Then we'll discuss the scenarios that **"push" consumers to actively seek out a new PCP.**

- 03 Stop blaming your competitor.
- 04 Cost, not medical error, is top reason respondents would switch PCPs.
- 05 Time to appointment is most important time.
- 06 Patients value quality (not quantity) of time.
- 07 Manners beat credentials.
- 08 They trust strangers before friends and family.

Next, we'll move on to the scenarios that would **"pull" consumers to try a competitor's PCP practice.**

- 09 Access and convenience are huge selling points.
- 10 Co-locating services? Patients prefer specialty services or lab on site.
- 11 Best hospital affiliation trumps good quality scores or recommendations.
- 12 Customer service takes a back seat to provider continuity and credentials.

PCP Characteristics Correlated with **Loyalty**

Most patients aren't loyal.

Few respondents indicated a high level of allegiance to their PCPs. Only one-third were highly likely to recommend their PCP to friends and family, and only half were confident they will not switch PCPs in the coming year. Even fewer say they definitely would follow their PCP if he or she moved to a new clinic or practice.

Percentage of Consumers “Highly Loyal” in Each of Three Loyalty Measures

Q: If your primary care physician moved to another clinic or practice, how likely are you to follow your primary care physician to another clinic or practice?

(On a scale of 0 to 10, with 0 equaling “definitely would not follow” and 10 equaling “definitely follow”)



9%

Q: How likely are you to stay with your primary care physician over the next 12 months?

(On a scale of 0 to 10, with 0 equaling “definitely not staying” and 10 equaling “definitely staying”)



53%

Q: How likely are you to recommend your primary care physician to friends or family members?

(On a scale of 0 to 10, with 0 equaling “not at all likely” and 10 equaling “extremely likely”)



36%

Note: Consumers defined as “highly loyal” if they responded 9 or 10 to questions.

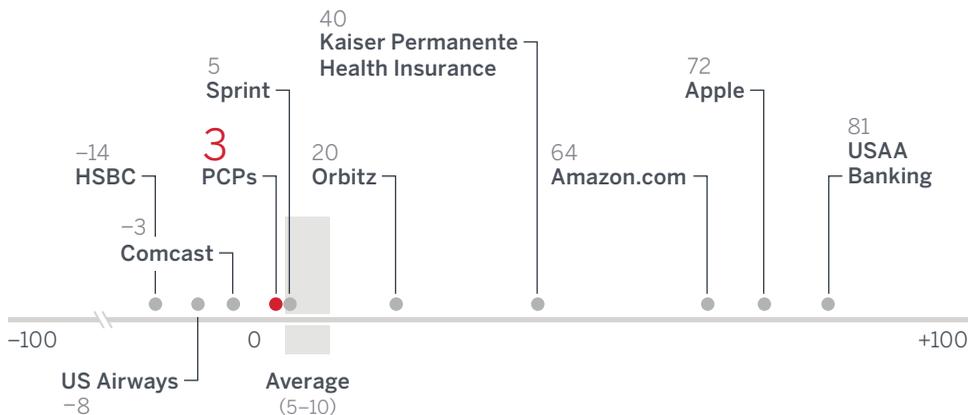
How do PCPs stack up against other consumer brands and services?

To compare patient loyalty to other brands, we calculated the net promoter score (NPS) for respondents' PCPs. The promoters barely outnumber the detractors: Only 36% were promoters, 31% were passives, and 33% were detractors, giving PCPs an NPS of three.

While the net promoter score can range from -100 to +100, the average firm has an NPS of 5 to 10. Companies most likely to grow operate with an NPS of 50 to 80.

NPS Scores for U.S. Companies

2014



WHAT IS THE NET PROMOTER SCORE?

Satmetrix, the creators of Net Promoter Methodology, describe it as follows:

The Net Promoter Score (NPS) divides a company's customers into three categories: Promoters, Passives, and Detractors. By asking consumers how likely they are to recommend your company to a friend or colleague, companies track these groups and get a measure of their performance. Customers respond on a 0- to 10-point rating scale and are categorized as follows:

- Promoters (score 9–10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- Passives (score 7–8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0–6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

To calculate the NPS, take the percentage of customers who are Promoters and subtract the percentage who are Detractors, getting a number from -100 to +100.

A little **trust**, **patience**, and **respect** go a long way.

Out of the 27 factors evaluated, four correlate with a patient's self-professed likelihood to stay with, follow to a new location, and recommend their PCP. These factors are all related to interpersonal interactions between the patient and the physician or staff.

Factors Correlated with Likelihood to Stay, Follow, and Recommend

Correlations Significant at 0.01 Level

FACTOR	STAY	FOLLOW	RECOMMEND
Trust PCP to make right diagnosis and recommend appropriate treatment	✓ .46	✓ .30	✓ .59
PCP respects me	✓ .45	✓ .30	✓ .57
PCP explains possible causes of illness and helps me stay healthy in the future	✓ .43	✓ .32	✓ .57
The staff are patient and helpful	✓ .35	✓ .21	✓ .48
Length of relationship with PCP	✓ .25	✓ .21	
Time PCP spends with me during visit	✓ .22		✓ .23
Wait from appointment time to seeing physician	✓ .21		
PCP's affiliation with the perceived best hospital in my area			✓ .21

- Four factors (out of 27 evaluated) correlate with patients who are more likely to stay with, follow, and recommend their PCP.
- These four factors related to interpersonal interactions between the patient and the physician or staff.

Another four factors correlate with just one or two of the loyalty measures. For example, while short wait times correlate with being likely to stay with the current PCP, they do not correlate with being likely to follow or recommend.

Building Loyalty with Current Patients

Stop blaming your competitor.

Across the 48 scenarios, 17 out of the top 20 were associated with missteps the current PCP could take (“push” scenarios), rather than attributes that a new PCP in the market could offer (“pull” scenarios).

RANK	► “Push” scenarios
► 01	My PCP no longer accepts my insurance
► 02	I will have to pay an extra \$250 per year to continue seeing my PCP
► 03	I experience a medical error with my PCP
► 04	My PCP becomes rude or impatient with me
► 05	I start leaving my appointments feeling confused about my illness and/or treatment plan
► 06	I will have to pay an extra \$100 per year to continue seeing my PCP
► 07	My PCP’s staff (front desk or clinical) become rude or impatient with me
► 08	The wait time to schedule an appointment with my PCP increases by two weeks
► 09	My PCP moves offices and is now twice as far from me
► 10	My PCP’s wait time (in the waiting room and in the exam room) increases by 30 min
► 11	I will have to pay an extra \$50 per year to continue seeing my PCP
► 12	My PCP starts spending less time with me during visits
► 13	I will be treated by the first available PCP in the practice and not necessarily my PCP
► 14	My PCP receives negative publicity regarding a care quality issue
15	I will have no out-of-pocket costs for my visit if I switch from my PCP to the new PCP
► 16	I get assigned to the practice’s AP rather than my PCP
17	The new PCP makes sure patients understand their illness and treatment plan
► 18	My PCP receives several negative reviews online
► 19	My PCP’s clinic reduces the number of hours that it is open
20	The new PCP guarantees a wait time of less than 15 minutes
21	The new PCP offers same- or next-day appointments for non-urgent routine visits
► 22	My PCP’s wait time to schedule an appointment increases by one week
► 23	My PCP changes hospital affiliations to another hospital
24	The new PCP’s clinic is open for appointments on weekends
25	The new PCP guarantees that I will always see him/her when I come in for an appointment
26	The new PCP’s clinic is open for appointments on weekday evenings

- 27 The new PCP is known for showing respect and patience with his/her patients
- ▶ 28 A friend/relative tells me about a negative experience they had with my PCP
- 29 The new PCP guarantees that I will always be treated by a doctor instead of AP
- 30 It would take me half the time to travel to the new PCP as it does to my PCP
- 31 The clinic where the new PCP practices has specialty services in the same building
- 32 The new PCP is affiliated with the best hospital in my area
- 33 The clinic where the new PCP practices has lab services on site
- 34 The new PCP guarantees to spend 20 or more minutes with me every time I visit
- 35 The new PCP offers an online portal where I can view my health records online
- 36 A friend or relative strongly recommends the new PCP to me
- 37 The clinic where the new PCP practices can provide care for my entire family
- 38 The new PCP's clinic has a quality score above my current PCP's clinic's
- 39 The staff at the new PCP's office are known for excellent customer service
- ▶ 40 My PCP's wait time (in the waiting room and in the exam room) increases by 15 minutes
- 41 The new PCP provides me with the exact price of the visit in advance of the visit
- 42 The new PCP's patient satisfaction score is above my current PCP's
- 43 The clinic where the new PCP practices has imaging services on site
- 44 The new PCP guarantees a wait time of less than 30 minutes
- 45 The new PCP offers virtual visits (video and/or email)
- 46 The new PCP gets excellent reviews online
- 47 The new PCP offers online appointment scheduling
- 48 The clinic where the new PCP practices has a pharmacy on site

Loyalty drivers differ across demographics: Women and older respondents in particular assign higher average utilities for scenarios related to missteps by their current physician, while men and younger consumers put more value on attributes of a new competitor. The implication? Women and older consumers are more likely to switch because they are unhappy with their current provider, while men and younger consumers are more likely to switch to take advantage of new competitor offerings.

Percentage of Average Utilities Assigned to “Push” Scenarios

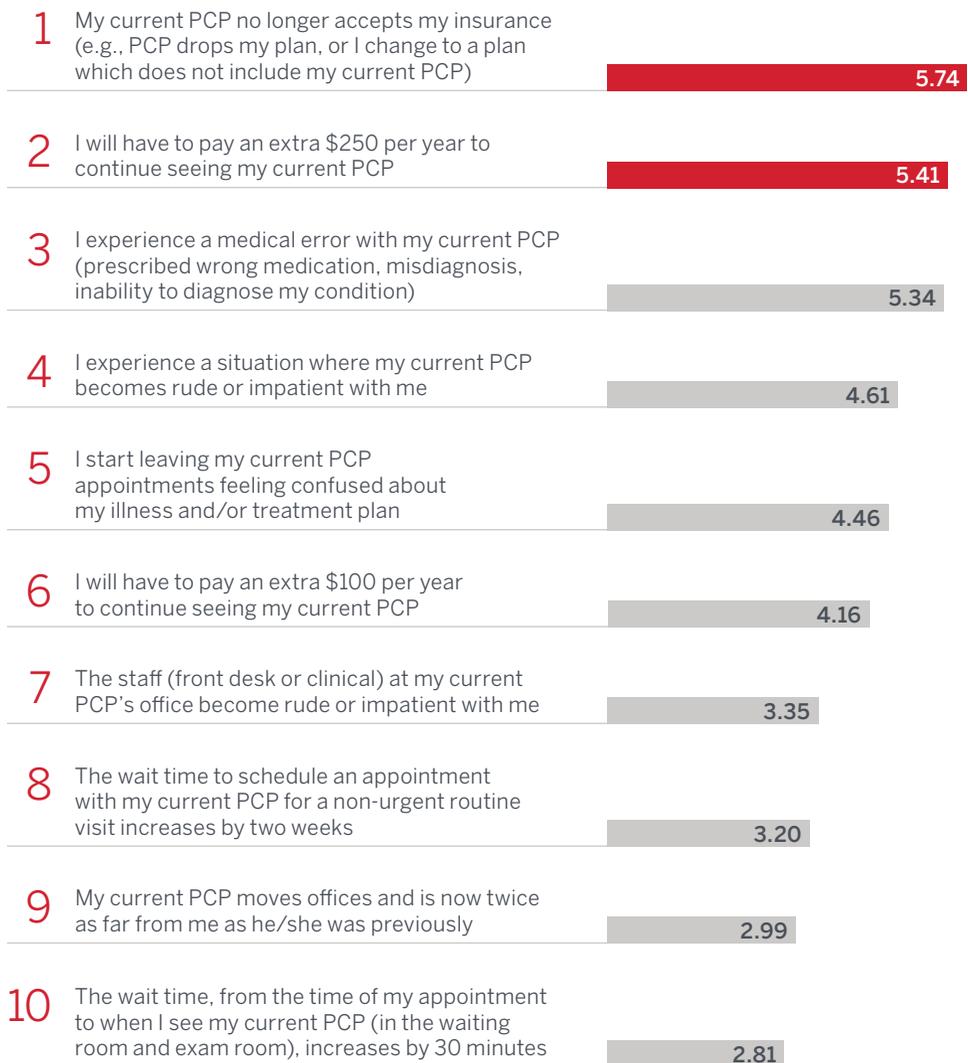


Cost, not medical error, is top reason respondents would switch PCPs.

Unsurprisingly, respondents were “most likely” to switch when providers no longer accepted their insurance. What was surprising? A slight majority of respondents (52%) were more likely to switch over a \$250 annual cost increase than if they had experienced a medical error with their current PCP.

Top 10 Scenarios Making Respondents Likely to Switch PCPs

Average Utility (see next page for explanation of utility score)



Which demographic groups are more likely to switch due to a medical error than a yearly increase of \$250?

The groups listed below ranked “experiencing a medical error” above “paying an extra \$250 a year to continue seeing your PCP” as a reason to switch providers.

- Respondents over 50 years old
- Respondents who make above \$50K annually
- Non HDHP beneficiaries
- Respondents who have seen their PCP for more than 10 years

Q We also tested what would happen if we added \$100 or \$50 to the annual bill. **So, what would consumers rather endure than paying the extra \$50 difference?**

“I will have to pay an extra \$100 per year to continue seeing my current PCP” ranked 6th for reasons to switch PCPs, and “I will have to pay an extra \$50 per year to continue seeing my current PCP” was ranked 11th. There were four scenarios where patients would switch PCPs before paying this extra \$50 annually:

- If a staff member were rude or impatient
- Time to appointment increased by two weeks
- Travel time to see the PCP doubled
- Waiting room time increased by 30 minutes

UTILITY SCORE EXPLANATION

Utilities are probabilities (ranging from 0 to 100) that reflect the likelihood that an item would be selected as “best” among a representative set of items in the MaxDiff questionnaire. This data reflects a ratio-quality scale. The utilities are then averaged across the respondent pool to calculate average utilities.

- ▶ Know your target market before adding practice access fees.
- ▶ Since exchange participants have more flexibility to switch insurers, make sure they know which plans include your PCPs.



Time to appointment is most important time.

Consumers would rather wait an extra 30 minutes in their PCP's office or drive twice as far to their PCP than wait an extra two weeks for an appointment.

60%

would be more likely to switch PCPs if...



...they had to wait two more weeks for an appointment...



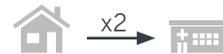
...versus waiting 30 more minutes in the waiting room

56%

would be more likely to switch PCPs if...



...they had to wait two extra weeks for an appointment...



...versus if their PCP moved twice as far away

But there is a threshold: While waiting two extra weeks to schedule a non-urgent appointment ranked 8th out of 21 scenarios likely to prompt a switch, waiting just one extra week ranked near the bottom of the list, at 18th.

Low waits create high expectations: Across all respondents, consumers that currently have the shortest wait to appointment assign the highest value to same- or next-day appointments. Accordingly, this group is more sensitive to an increase in time to appointment than those that already have longer wait times.



TIP

- ▶ For existing patients, keep time to next available appointment short, especially if that's what they're already used to.

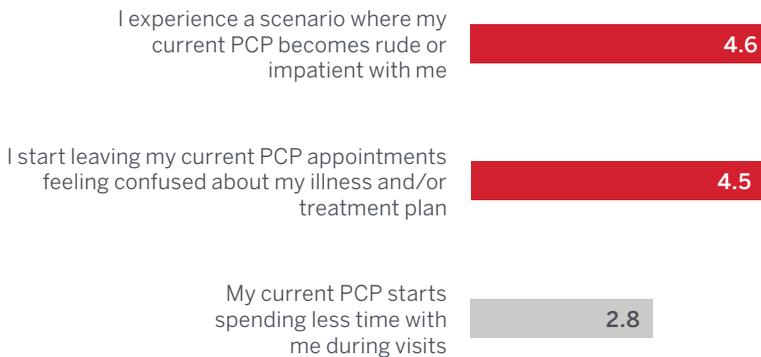
Patients value **quality** (not quantity) of time.

To assure patients they will be respected and their questions will be answered, some practices now guarantee 20-, 30-, or even 60-minute appointments. However, respondents indicated that physician respect and patient education are more important than the total time spent with the physician.

Longer appointment times may be necessary to give providers the time needed for more complex patients. However, patients are unlikely to be upset by a brief visit if they feel that a PCP has adequately informed them about their condition and treatment plan.

Average Utility of “Doctor-Patient” Scenarios

Higher Utility Score Indicates Patient Is More Likely to Switch PCP



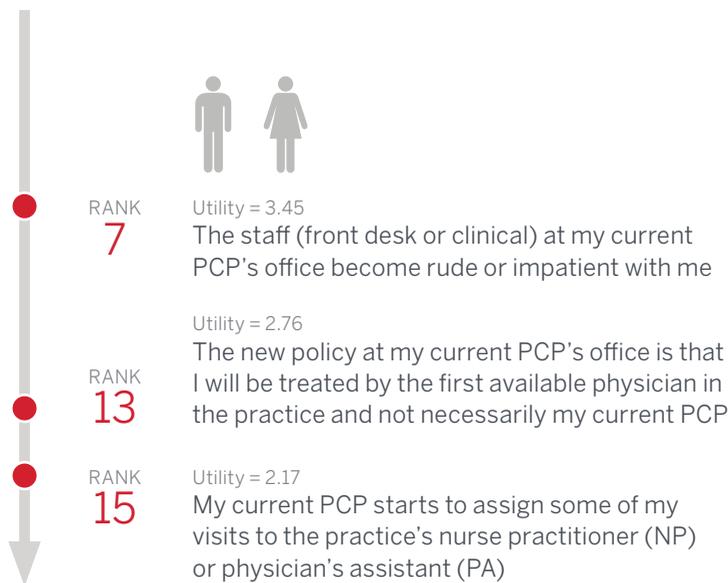
- ▶ Support physicians and staff in building relationships with patients by setting high service expectations and providing appropriate training.
- ▶ Invest in technology and standardized resources to boost patient education efforts.



Manners beat credentials.

While many providers worry about the impact of team-based care on patient loyalty, current patients seem to care more about **how** they are treated than **by whom**. “The staff (front desk or clinical, not including the PCP) becoming rude or impatient with me” was the 7th most likely scenario to prompt a PCP switch. Factors related to provider continuity and credentials ranked lower—13th and 15th, respectively.

Average Utilities and Rank of “Service” Related Scenarios Making Consumer Most Likely to Switch PCPs



Even spending 30 more minutes in the waiting room is less irritating than an offensive staff member: “The wait time, from the time of my appointment to when I see my current PCP, increases by 30 minutes” ranked 10th.



TIP

- ▶ Underscore the importance of **ALL** staff interactions with patients.

They trust **strangers** before friends and family.

When it comes to reputation, negative online reviews are more influential among current patients than a friend or relative's bad experience with the provider. Sixty-nine percent of respondents would be more likely to switch providers if their PCP received negative online reviews than if their loved one shared a complaint.



Negative online reviews ranked 14th: they are more likely to make a patient switch PCPs than “a friend or relative tells me about a negative experience they had with my current PCP,” which ranked 20th (out of 21 total) among “push” scenarios.



vs.



- ▶ Monitor and respond to negative online reviews.



Attracting Competitors' Patients

Access and convenience are huge selling points.

In the previous section, we saw that longer delays are less likely than other concerns to prompt a patient to **actively seek out** a new PCP. In contrast, respondents rated promises of shorter waits and better access as three of the top five most appealing attributes a **new competitor** could offer.

To the right are the 10 scenarios respondents rated as most likely to entice them to try a new practice.

15 Minutes Matter: While one of the most powerful motivators for trying a new competitor is a guarantee of a 15-minute or less wait time at the office, a guarantee of a 30-minute or less wait time ranked near the bottom of the list of attributes that would pull a consumer to switch.

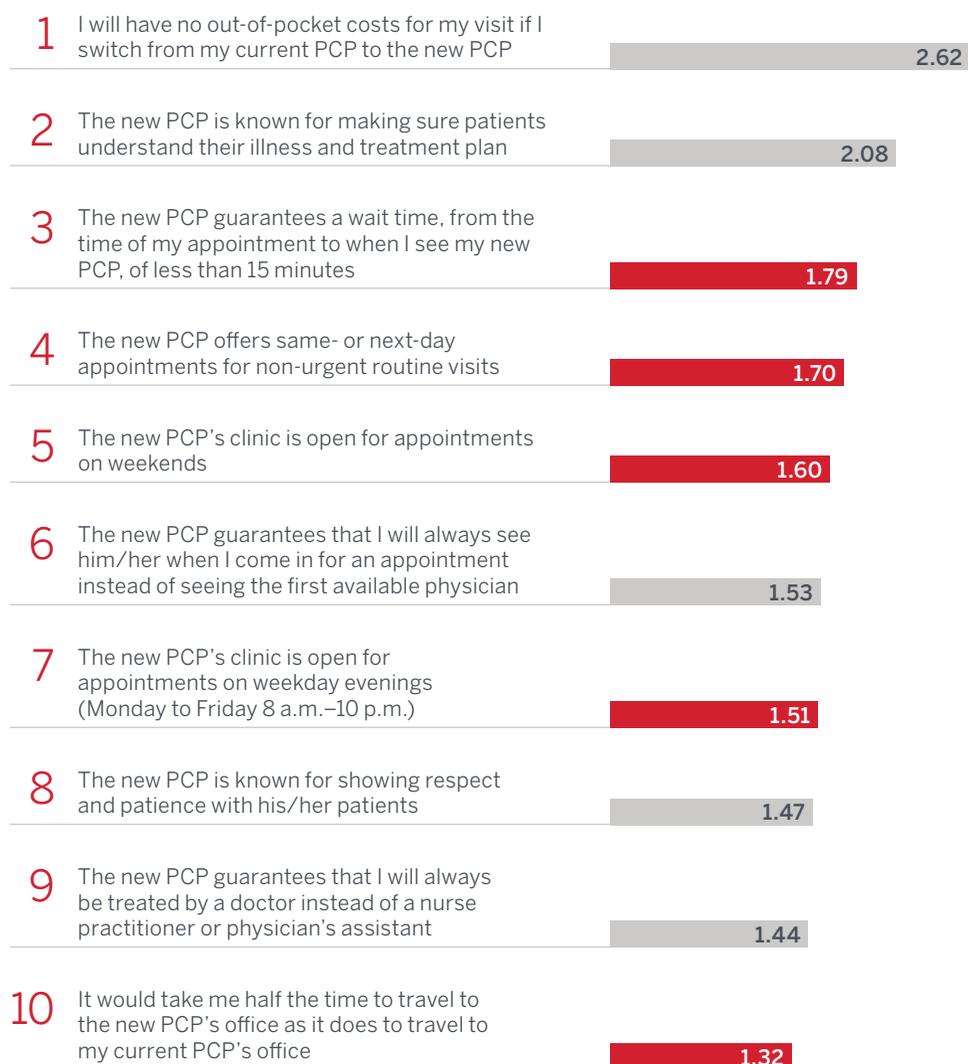


TIP

- ▶ Differentiate your PCPs by executing on and highlighting access and convenience aspects of your practice—specifically short wait times, same-day or next-day appointments, and extended hours.

Top 10 Competitor Scenarios Making Respondents Likely to Switch PCPs

Average Utility

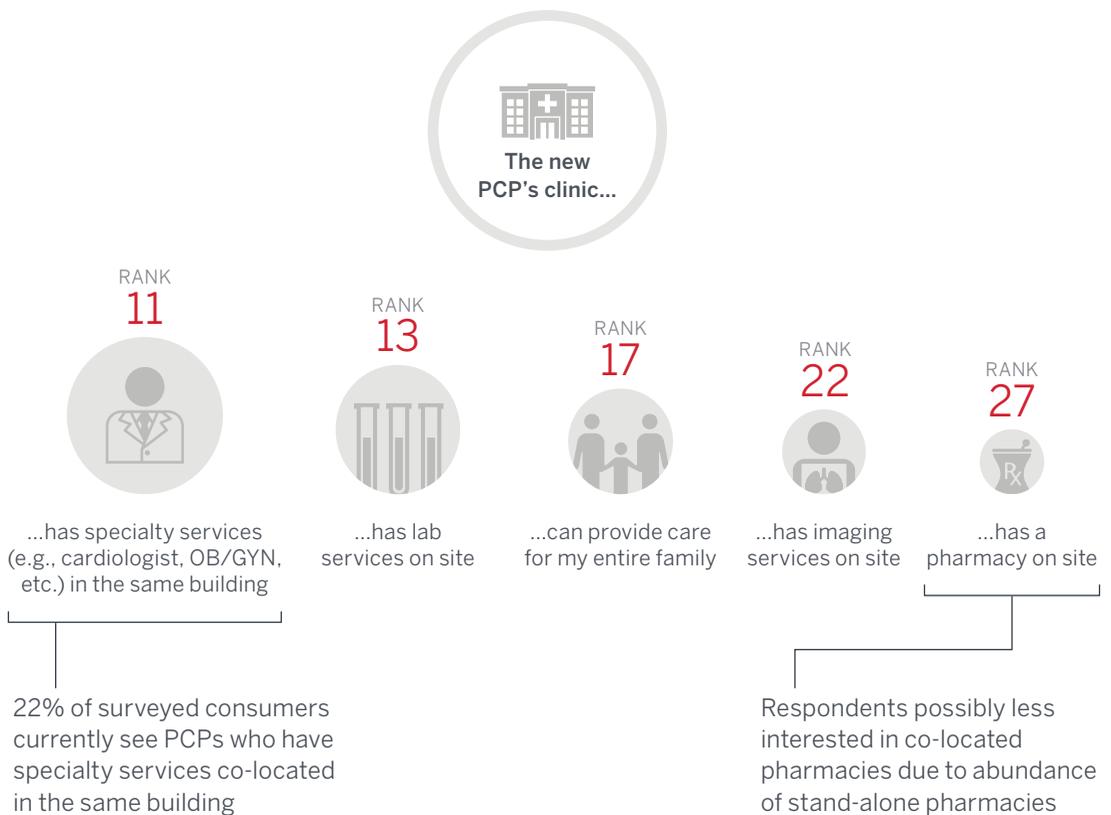


■ Scenarios related to access and convenience

Co-locating services? Patients prefer specialty services or lab on site.

When deciding which services to co-locate in the same building with your PCP practice, consider this: respondents indicated they would be more drawn to a clinic offering on-site specialty services (like cardiology or gynecology) or lab than to one offering on-site imaging or pharmacy.

Rank of “Co-located Services” Scenarios Making Consumers Most Likely to Switch PCPs



Know your target population: Respondents with children under age 18 slightly preferred a clinic offering care for the entire family to one offering co-located specialty services.

Best hospital affiliation trumps good quality scores and recommendations.

Respondents were more likely to consider switching to a new competitor practice if it was affiliated with the perceived best hospital in their area than if the practice was strongly recommended by friends or family or had better quality scores than their current PCP.



The new PCP is affiliated with the best hospital in my area



A friend or relative strongly recommends the new PCP to me



The clinic where the new PCP practices has a quality score above my current PCP's clinic's

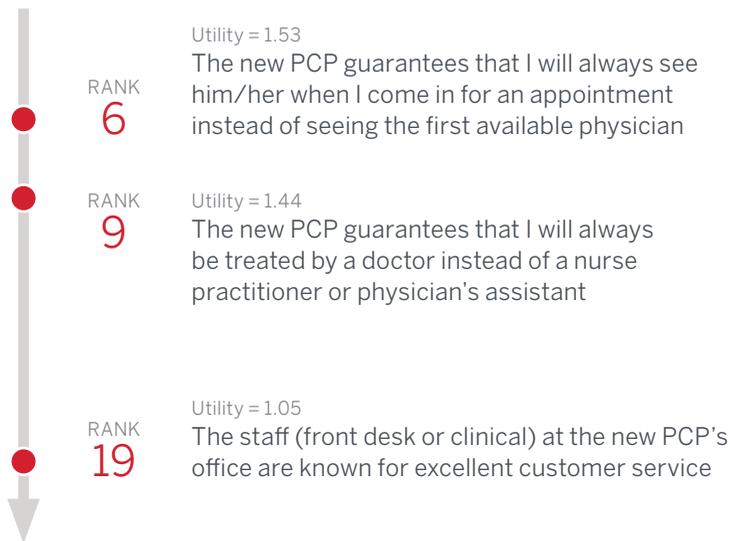
- ▶ Highlight your affiliation if the brand has high and positive recognition in the market.



Customer service takes a back seat to **provider continuity and credentials.**

In the previous section, we saw that staff courtesy was more important to retaining current patients than were provider credentials and continuity. However, when attempting to recruit patients from other practices, we see the opposite. Promises of good customer service were far less powerful than promises of care continuity and assurances that patients would be treated by a physician, not an advanced practitioner.

Average Utilities and Rank of “Service” Related Scenarios Making Consumers Most Likely to Switch PCPs



To review additional insights for appealing to consumers, specifically for on-demand primary care, please see our related research briefing: **What Do Consumers Want from Primary Care?**

We asked nearly 4,000 consumers about their on-demand care preferences across 56 clinic attributes. In our research brief, you'll learn the top clinic attributes, patients' relative preferences, and cohort differences when choosing a clinic for a low-acuity illness like the flu.



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| Your Next Steps

After using the survey results to inform your approach to retaining and attracting patients, access our research for innovative strategies and templates to improve your services.

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