

What do Consumers want from Health Care?

You know you need to exceed consumers' expectations—both to attract patients and to keep them loyal. **But what exactly do consumers want? And what should you prioritize first?**

We surveyed thousands of consumers across the United States to better understand those expectations and learn what drives their health care decisions. Here, we've compiled the top findings from our three consumer choice surveys to help you attract patients for on-demand services, retain patients in primary care, and win self-referrals in specialty care.

Primary Care Consumer Choice Survey

Read all of the results at advisory.com/mp/c/survey

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

Consumers prioritize convenience over continuity and credentials.

Respondents ranked four access and convenience attributes higher than being treated by the same provider each time they visit the clinic, and six access and convenience attributes higher than being treated by a physician.

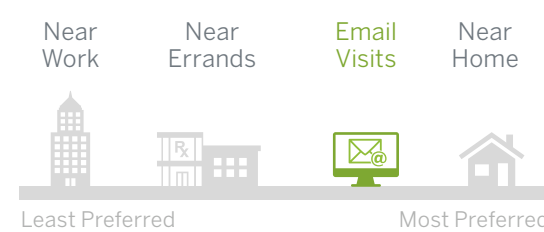
Rank of Clinic Attributes



Clinic near errands or work? They'd rather meet you online.

Respondents preferred email visits over a clinic near errands or one near work.

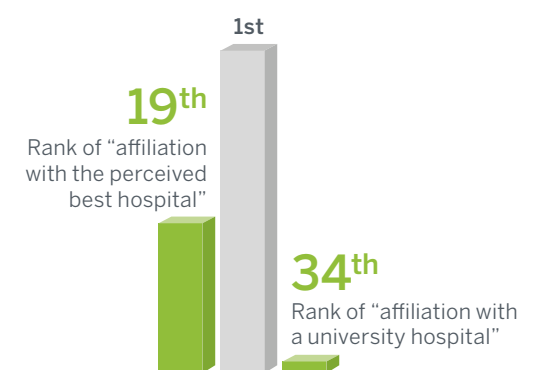
Preference for Service Location



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.

Rank of Reputation Related Attributes



PCP Consumer Loyalty Survey

Read all of the results at advisory.com/mp/c/loyaltysurvey

WHAT IT COVERS

Ongoing primary care

WHY NOW?

Downstream referrals, care coordination, and disease management—success for many health system goals hangs on patients' loyalty to their personal physicians. But your patients likely aren't loyal.

Percentage of consumers "highly loyal"



53%

of consumers are highly likely to stay with their PCP over the next 12 months



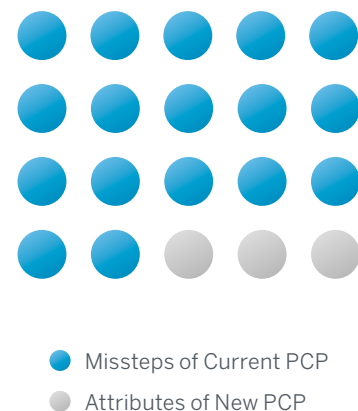
36%

of consumers are highly likely to recommend their PCP to a friend or relative

Stop blaming your competitor.

Of the top 20 scenarios most likely to prompt a consumer to switch PCPs, 17 were associated with missteps the 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



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

A slight majority of respondents (52%) were more likely to switch PCPs if the annual cost increased by \$250 than if their PCP made a medical error.

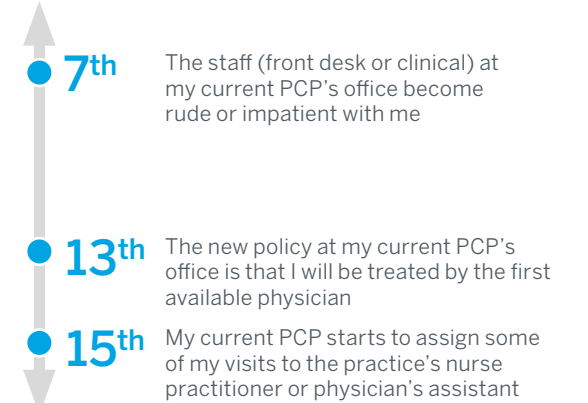
Top 3 Scenarios Prompting PCP Switch

- 1 My current PCP no longer accepts my insurance
- 2 I will have to pay an extra \$250 per year to continue seeing my current PCP
- 3 I experience a medical error with my current PCP

Manners beat credentials.

Current patients care more about how they are treated than by whom: respondents were significantly more likely to consider a PCP switch after facing rude staff than different staff.

Rank of Service Related Scenarios Prompting PCP Switch



Specialist Consumer Choice Survey

Read all of the results at advisory.com/mp/c/specialistsurvey

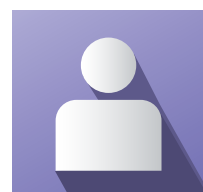
WHAT IT COVERS

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 (or your competitors') growth.

Source of specialist visit



34%

of respondents self-referred



64%

of respondents followed a physician referral

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.

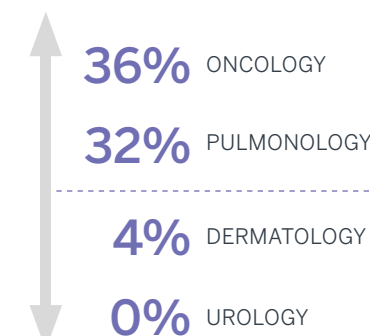
Percentage of Consumers Citing Distance as Factor



Does affiliation matter? Depends 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

