

How likely are patients to switch primary care providers?

Health systems are growing their primary care footprint with propensity models informed by a combination of claims and consumer data.

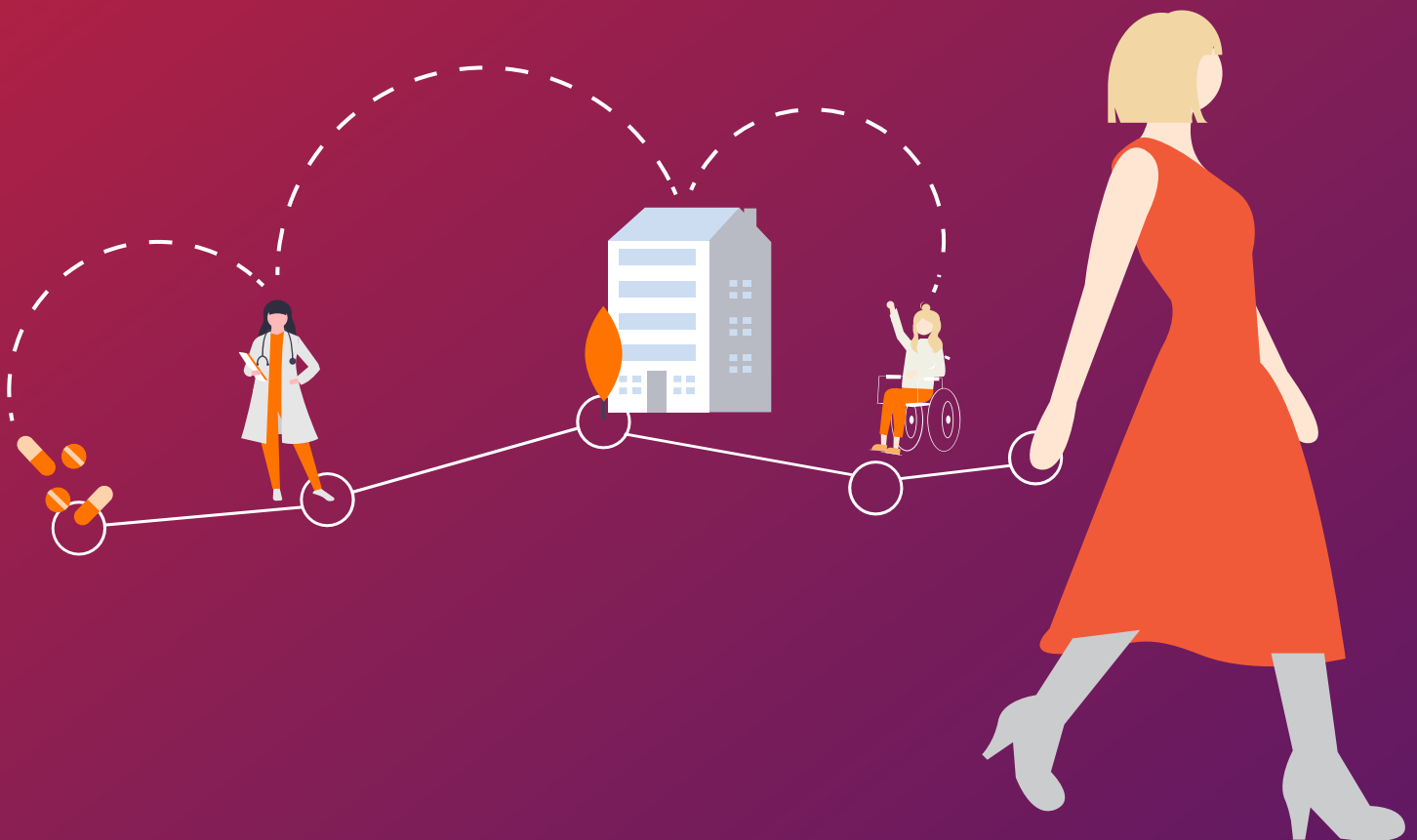


Introduction

Primary care is often the gateway for more advanced care, translating to volume and profits for the rest of the health system.¹ Patients who have an established relationship with a primary care provider (PCP) in a specific health system are more likely to stay within that system for higher-margin specialist services.

The continuity of care that comes with PCP loyalty also matters to patients² and can improve their health outcomes.³ As reimbursement models evolve to value-based care, those long-term outcomes are also growing in importance to payers and providers.⁴

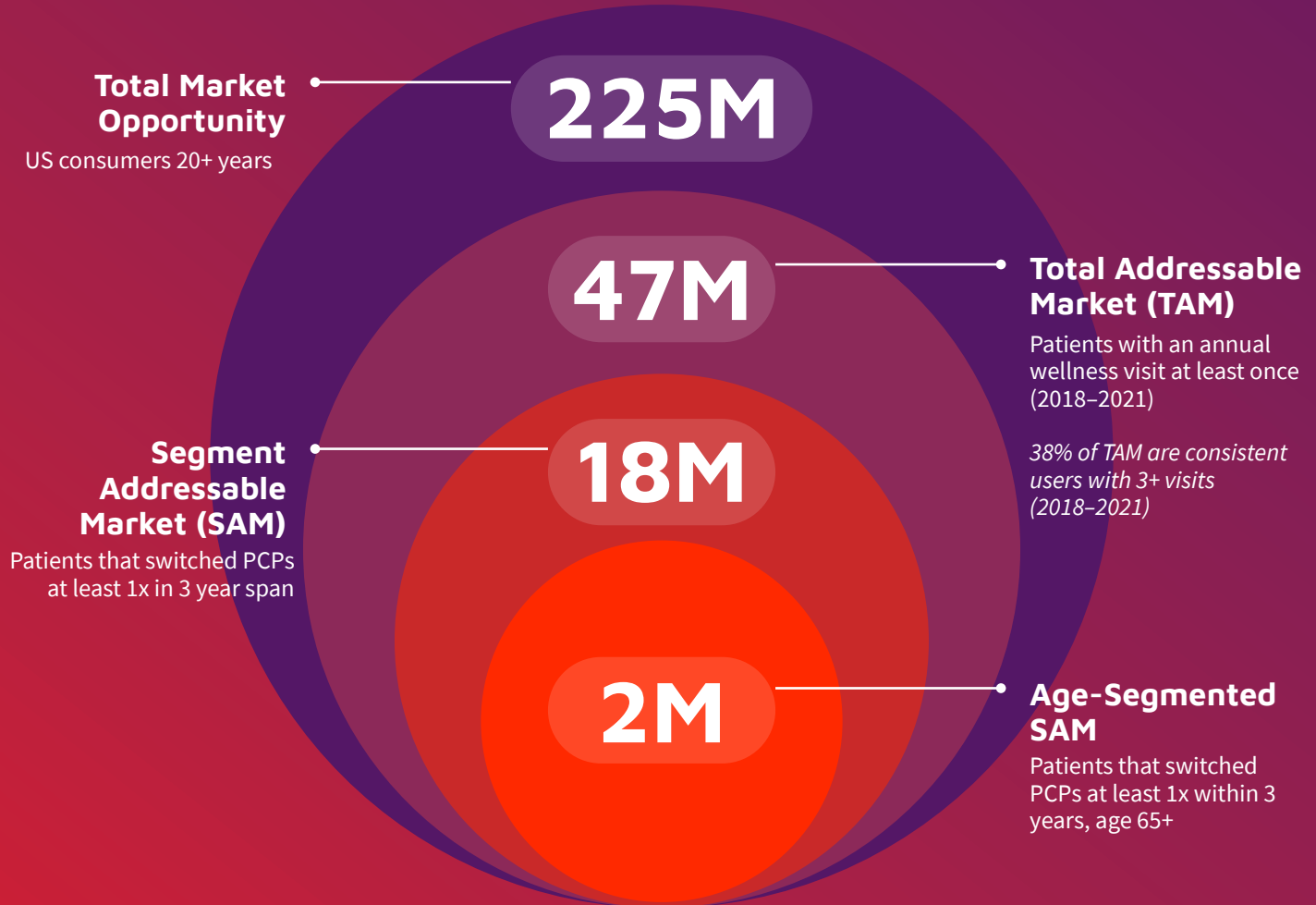
These days, health systems need to defend their share of the primary care market against new entrants such as retail drug stores, urgent care centers, and tech startups. If a health system can identify the size of the opportunity within their market and target patients who are likely to switch, they can both retain their existing primary care base and grow their primary care footprint.



What's the size of the opportunity?

Populi found that a relatively small proportion of the overall US population sees a primary care provider for annual wellness care. Of that base of patients who are accessing preventive care, a significant number of those patients switch providers frequently. Nationally, more than 38%, or 18 million, annual wellness patients switched their primary care provider within the last three years.⁵

PCP Market Opportunity Breakdown: National Statistics



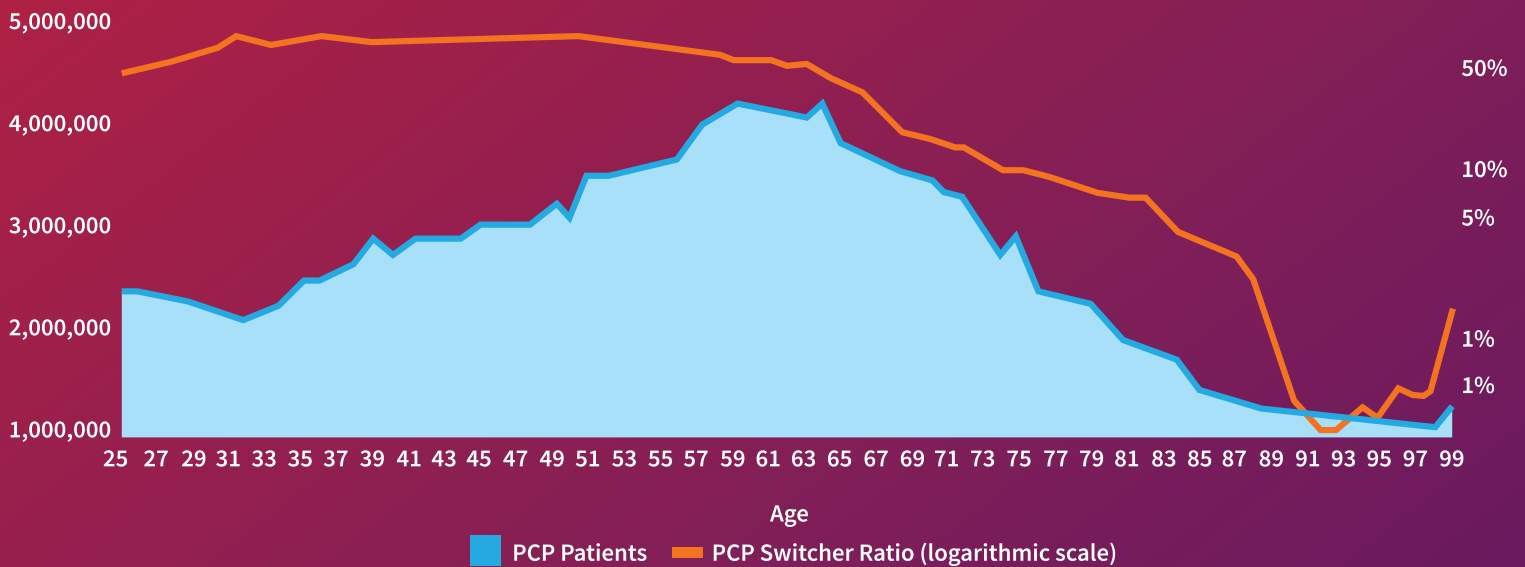
21% of the US population establishes consistent primary care relationships for wellness care, with 38% switching PCPs within 3 years

Who switches and why?

Historically, health systems relied on subjective consumer research studies to answer this question. Today, using a combination of claims and consumer data, it's possible to identify which consumer attributes are linked to establishing a relationship with any type of provider, including PCPs. Then within that population, determine who is likely to switch providers.

Populi found that nationally, PCP switchers tend to peak between the ages of 30 and 50, but that switching drops off significantly after age 65, when many transition from commercial insurance to government health insurance programs.⁶

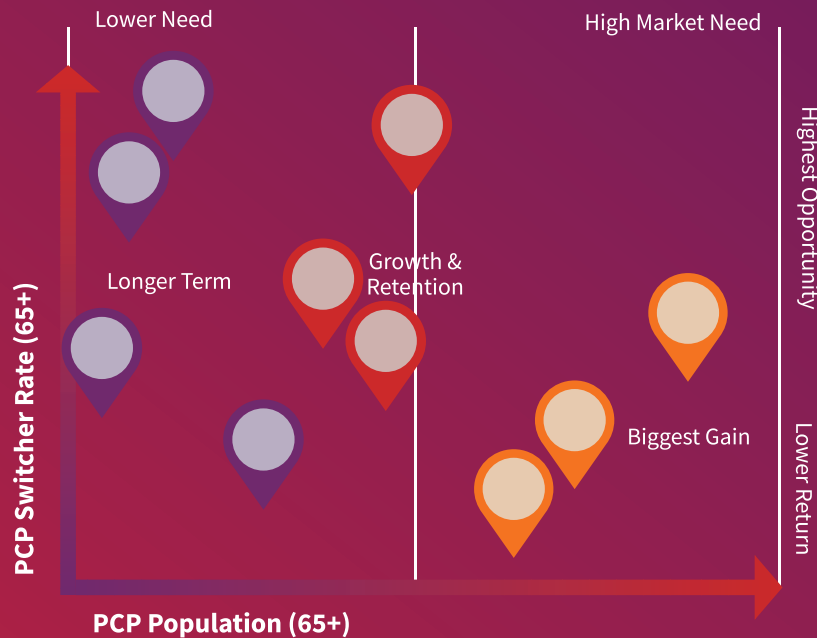
US Established PCP Population & PCP Switcher Ratio



What about my market?

Using live data from your local market, Populi can determine the size of your health system's opportunity and help you target the patients who are most likely to switch their PCP. We can help you deliver the right message, at the right time, in the right channel. Our primary care propensity model scores all patients within your geography and can even integrate existing consumer attributes, like Social Determinants of Health (SDOH). In this example, using the attributes of age and geography, we analyzed the market opportunity by quadrant.

PCP Market Opportunity Quadrant (65+)



Key Insights

Longer Term

Markets that have low-sized PCP population opportunity, with variable PCP switcher rates representing a longer-term strategy for retention over time.

Growth & Retention

Markets that have mid-sized PCP population opportunity, with relatively higher rate of return based on higher PCP switcher rates, representing both growth and retention.

Biggest Gain

Markets that have highest PCP population opportunity, with potentially lower rate of return based on relatively lower PCP switcher rates.

Get a Proof of Concept Demo

Want to understand primary care consumption in your market? Contact us for a demo today.

[Populi.ai/Request-Demo](https://populi.ai/Request-Demo)

Inform your growth strategy with business insights

Populi products can answer a wide variety of strategic and growth market questions. Wherever you are looking to grow, we'll help you meet your marketing, planning and patient growth goals.

- Who performs care in my service area?
- Where are patients going for care?
- What are total market volumes by service line and site of care, and what's my share of the market?
- How does my market compare to others?

Populi makes access to healthcare analytics easy with the tools to drive actionable strategic insights for your health system.



Strategic Planning

Providing Strategic Planning departments with volume, benchmark and forecast insights on patients, consumers and providers to assess competitive market share, demand, utilization and predictive trends.



Propensity Models

By connecting actual patient-level health data with consumer demographic, psychographic and socioeconomic data, Populi's AI prediction engine will help you identify and forecast your target patients' needs.



Patient Cohorts

Populi's Marketing Activation Service helps bring your clinical consumer models and segments to life by connecting securely to DMP, DSP, social and targeted TV platforms.



Patient & Consumer Marketing

A comprehensive selection of patient and consumer analytics that combine clinical and consumer data in a compliant way to enhance targeting and acquisition strategies.

“Primary care growth is important for both fee-for-service and value-based care. Understanding primary care consumption behavior and being able to segment consumers in your market helps you become increasingly data-forward in defining and achieving growth targets.”

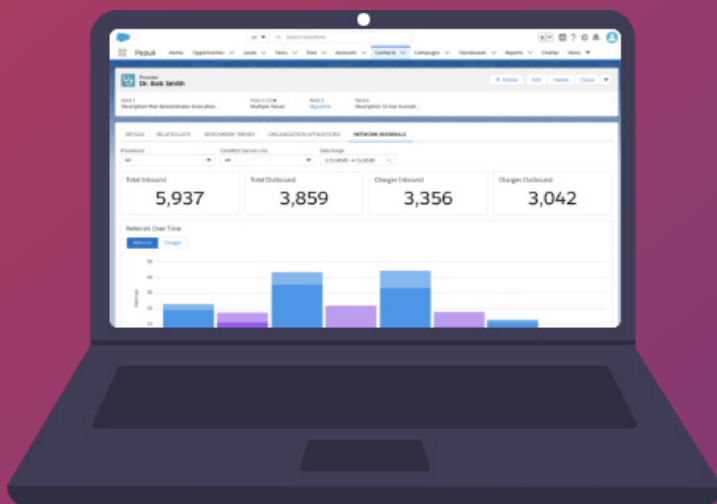


Leah Shea

EVP, Product at Populi, Inc.

Why Populi?

Populi is an analytics-as-a-service company that makes access to healthcare analytics easy. We enable healthcare organizations to market and sell to patients, consumers, and healthcare providers by delivering the analytics they need in the platforms they work in every day.



Get a Proof of Concept Demo

To show you just how different Populi is, we're offering a proof of concept demo with your live market data. No strings attached.

Populi.ai/Request-Demo

Footnotes:

1. Peebles, Anglica. “Medicine’s Worst-Paying Specialty Is Luring Billions from Wall Street.” Bloomberg. February 10, 2022. <https://www.bloomberg.com/news/features/2022-02-10/primary-care-health-investors-bet-billions-on-medicine-s-worst-paying-specialty>
2. Reed, Tina. “How hospitals can win patient and physician loyalty—and why they need to.” Fierce Healthcare. June 6, 2019. <https://www.fiercehealthcare.com/hospitals-health-systems/how-hospitals-can-win-patient-and-physician-loyalty-and-why-they-need-to>
3. Willett LL, Landefeld CS. The costs and benefits of hospital care by primary physicians: continuity counts. JAMA Inter Med. December 2017. <https://jamanetwork.com/journals/jamainternalmedicine/article-abstract/2663251>
4. “What Is Patient Loyalty, Does It Affect Healthcare Consumerism?” TechTarget. December 29, 2021. <https://patientengagementhit.com/features/what-is-patient-loyalty-does-it-affect-healthcare-consumerism>
5. Populi Population Intelligence (consumer data) and Populi Market Intelligence all payer claims data; analyzing consumers who establish direct care with a provider through E&M visit codes specific to annual wellness visits age segmented (CPT 99391-99397) with one visit each year for 3 years; PCP switchers are calculated by having different facility and billing providers within the 3-year period.
6. Populi Population and Market Intelligence solution