

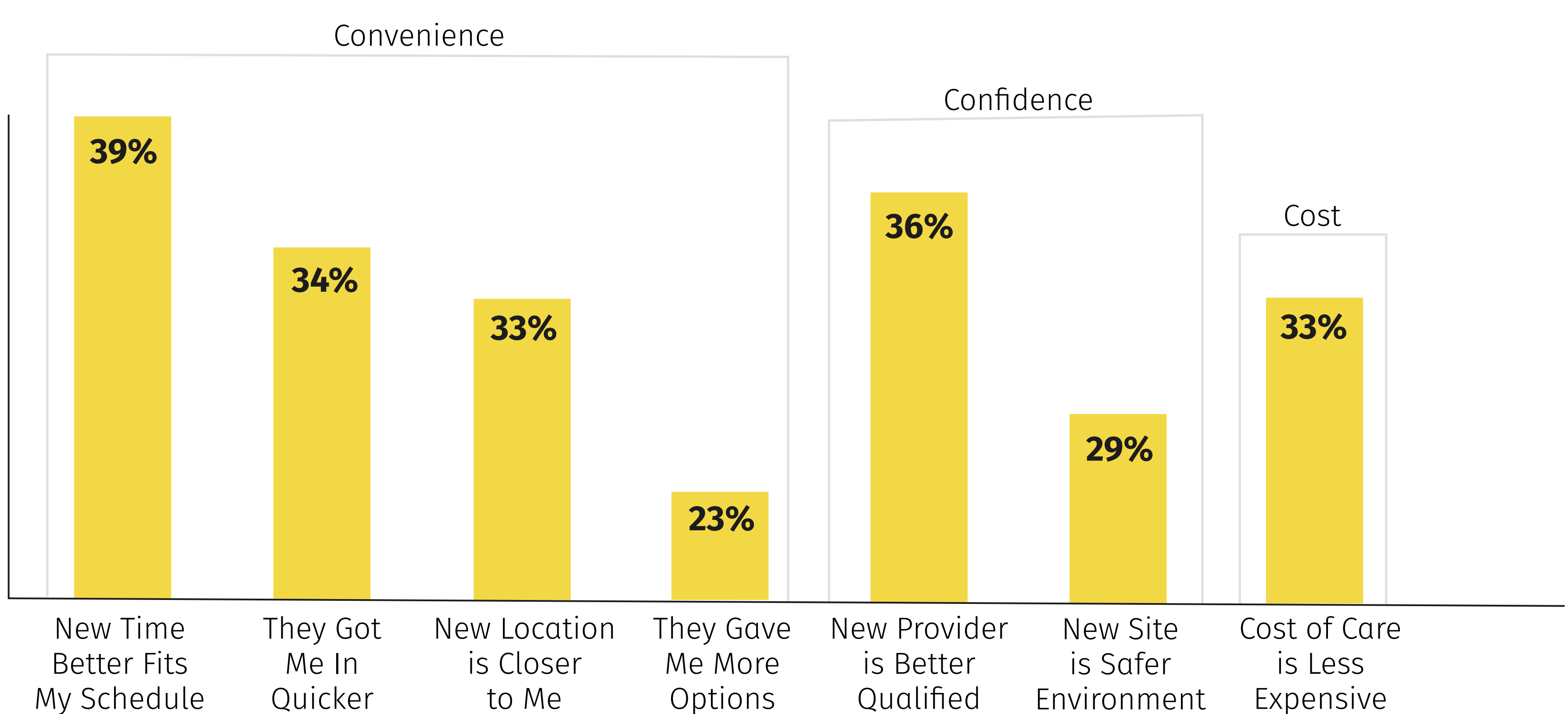
THE PROBLEM

As we cycle through the waves of the COVID-19 pandemic, there is an inherent volatility that is impacting health care providers recovery efforts. One aspect of that volatility is PCP Switching — 33% of U.S. adults indicate they are considering changing their primary care physician based on experiences during the pandemic. Refilling the primary care patient pipeline becomes infinitely more complex as a third of patients are looking elsewhere.

THE FACTS

As PCP's struggle with patient throughput due to safety precautions, convenience, confidence, and cost become driving factors in switching.

REASONS FOR RESCHEDULING WITH A DIFFERENT PHYSICIAN/FACILITY



Source: BVK Health Care Pulse Wave 2 May 28th-June 1st, 2020 (N=500)

THE SOLVE

Capitalizing on the PCP switching trend creates an opportunity for market share recovery predicated upon four guiding factors for selection criteria:

1. **Safety** as a foundational gating factor. If patients do not believe there are ample safety protocols in place to protect them as they visit an office, they simply will switch to a physician that does. Examples include personal protective equipment for staff and patients, eliminating waiting areas with remote access to enter offices one patient at a time, single point of entry and exit to avoid contact and sanitizer stations, everywhere.
2. **Reputation** of the physician is critical with credentials as a baseline and crowd-sourcing references from family, friends, co-workers, and health providers as pivotal. The ever-important word-of-mouth conveying service experience is amplified in social media.
3. **Convenience** through the control of care experience, location and delivery is an essential driver for PCP selection. Individual choice based on comfort and preference are key decision points including office or virtual and hospital or medical office. And proximity of that location is the final convenience factor for primary care physician selection.
4. **Affordability** is newly prominent given the pandemic economic downturn and severe rise in those without coverage. Reduced rates for cash payment or high deductible plans become essential offerings.

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