

The Doctor Will See You in a Minute: A Study of the Rising Relevancy of Retail Clinics and its Implications on Traditional Health Systems

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The Doctor Will See You in a Minute: A Study of the Rising Relevancy of Retail Clinics and its Implications on Traditional Health Systems

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Background

Traditionally, the healthcare market has been constructed in a manner that can mostly aptly be described as “business-to-business”, in which most of the interaction takes place between employers, providers, and insurers. However, recent trends have indicated that the consumers have become increasingly involved as they have become more aware of prices and benefits. In light of this trend, employers have opted to provide coverage through defined contributions, which presents the employees with a fixed amount of money to be spent through public or private exchanges. As the role of the consumer has increased, so too has the relevancy of the retail clinic – pharmacies and retail stores market these clinics as affordable and convenient alternatives to physician’s offices. The primary purpose of this study is to analyze the “retailization” of the healthcare market and to determine the courses of action physicians can take in order to adapt and compete.

Research

- What is driving the retailization trend?
- 1.) Price transparency – consumers are more aware of cost, quality, and convenience than ever before
- 2.) Aging demographic – 10,000 people are turning 65 every day
- 3.) Physician shortage – a lack of PCPs (projected shortage of 44,000 PCPS by 2025) has increased dependence upon nurse practitioners and physician assistants
- Studies have shown that retail clinics offer high levels of quality (as determined by patient reviews) in addition to low costs and minimal wait time.
- It is estimated that patients are willing to visit retail clinics (staffed by PAs) over a physician’s office if they save at least \$31.42 – the typical CVS MinuteClinic costs \$55 less than a physician’s office.
- Based upon patient reviews, researchers at the Annals of Internal Medicine concluded that the quality of care offered at retail clinics is comparable to that of physician’s offices (63.6% quality rating vs. 61.0%)

Research

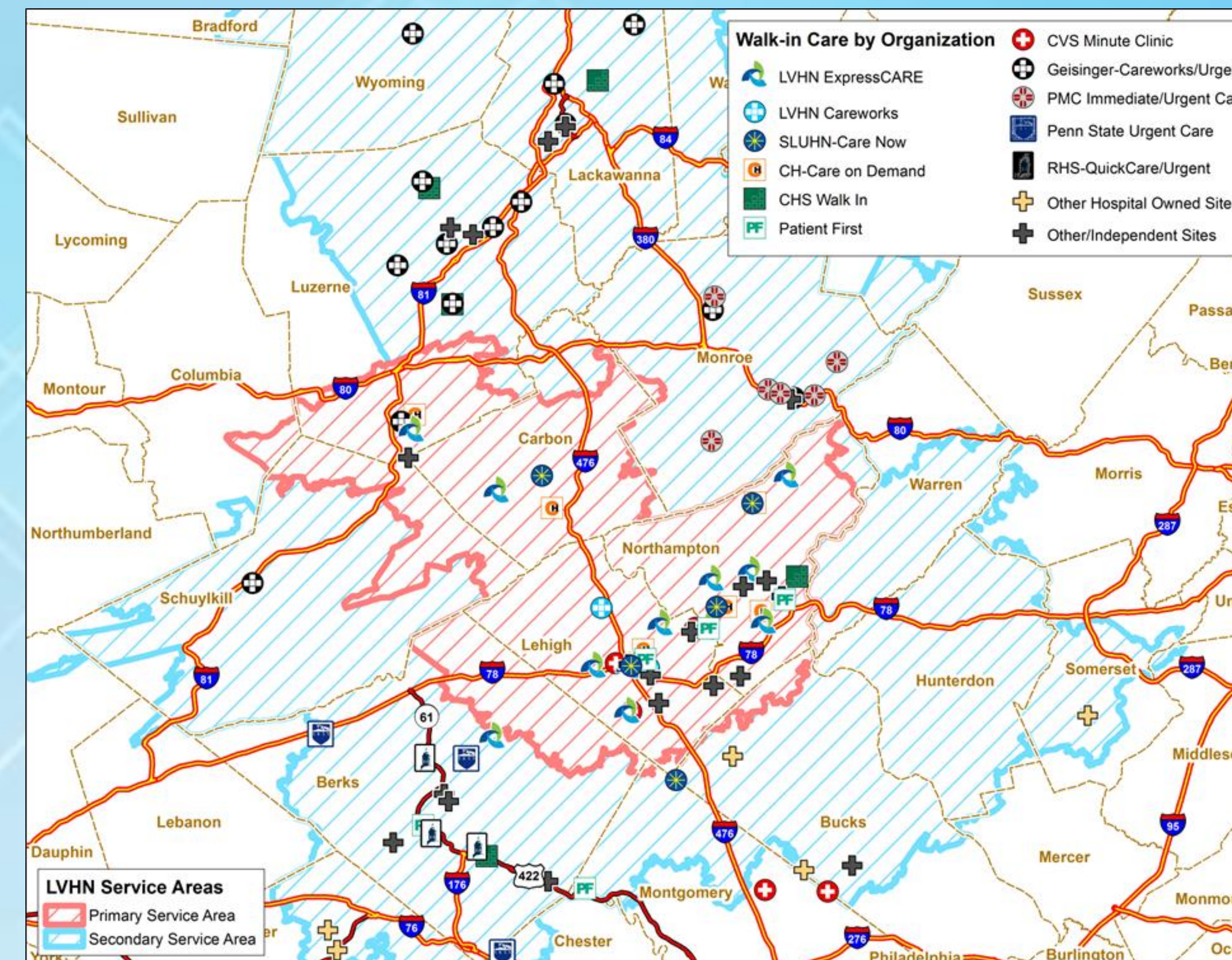


Table 1: This map displays the locations of every walk-in/urgent care center in the core and extended service areas.

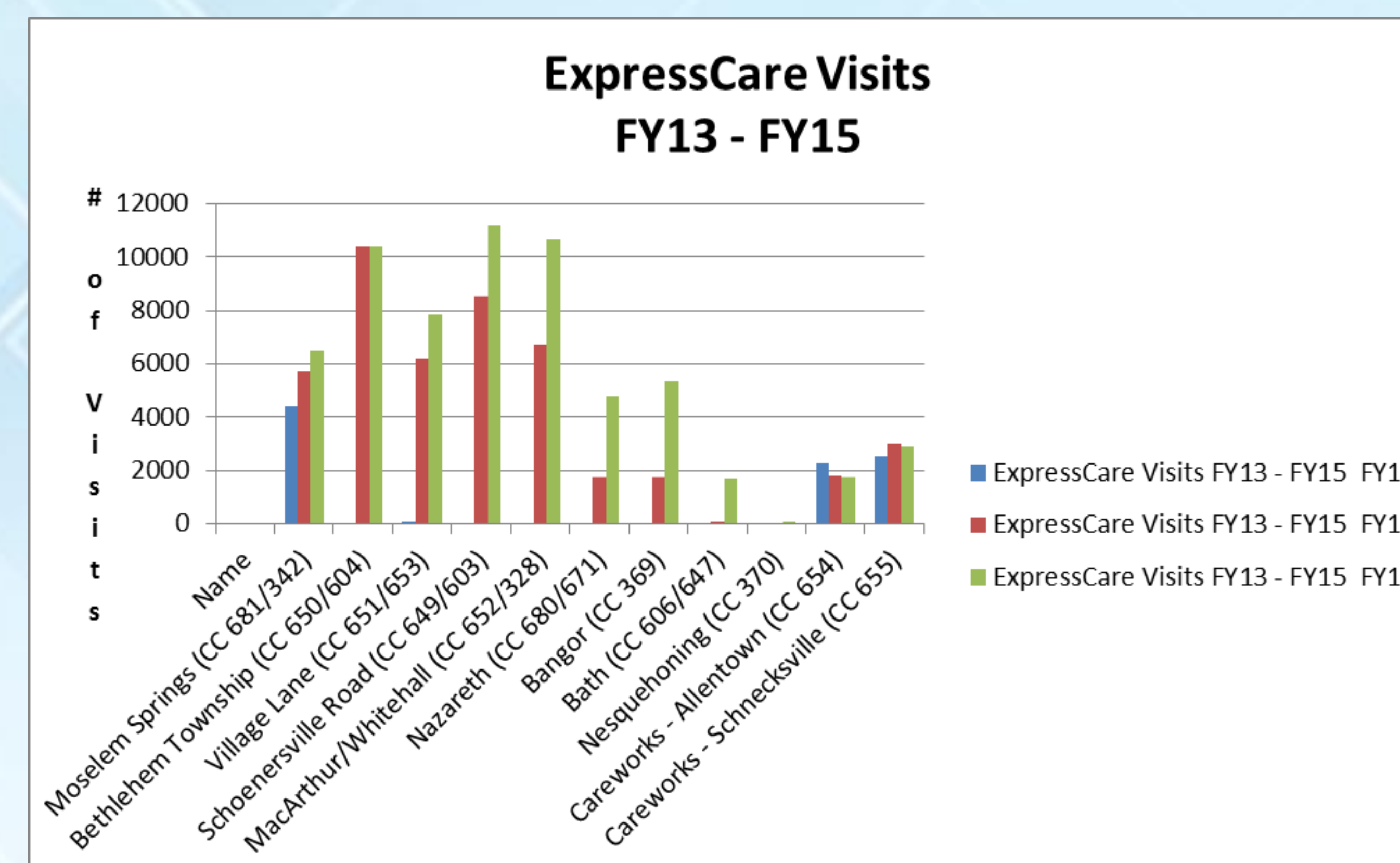


Table 2: Lehigh Valley Hospital features eleven ExpressCare sites, each of which offers walk-in care for common illnesses and injuries. As shown in the chart above, most of the sites have experienced significant growth throughout the previous three fiscal years.

Response

- Telehealth services provide access to quality care from PCPs in a cost-efficient manner.
- Telehealth could save \$537 million per year in would-be emergency department transports.
- LVHN TeleBurn – 24/7 access to specialists for burn patients in over 70 hospitals via electronic means of communication.
- LVHN TeleID - videoconferencing is used to connect specialists with ID patients. 489 TeleID consultations were performed in a two year period (April 2011 – August 2013)
- LVHN ExpressCARE – walk-in clinics that offer care for common illnesses, injuries, and laboratory services.
- LVHN CareWorks – network sponsored retail clinic located in Weis Markets in Allentown and Schnecksville.

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