Alternative Front Doors to Healthcare

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Consumerism on the Rise

McKinsey, Deloitte, PWC Surveys

Consumers are starting to want same type of value in healthcare as they expect from other strong consumer companies

Consumers want great customer service (healthcare and non-healthcare alike)

- Deliver on expectations
  - Access
  - Get information
  - Choice

- Make life easier

- Offer great value - expectations are being set by non-healthcare industries
Empowerment: The Digital Age for Engagement

Information Access
Medical Information
Navigation

Access Care
TELEHEALTH
Chronic Conditions:
Diabetes
Hypertension

Fitness and Wellness
79% willing to use wearable health device
*Fitbit $1.9B in 2015*
Access: Alternative Front Doors-When Loyalty Wanes

RETAIL HEALTH

• Value Proposition
  – Access: 7 days/wk, evenings/weekend/holidays, no appointment necessary
  – Convenience – in CVS, right in community, visit and medications
  – Value: price transparency, low cost

• Experience
  – 79% found the clinical experience the same OR BETTER
  – 95% Press Ganey Satisfaction

• Growth
  – MinuteClinic – 400-1,100 clinics in 6 years
  – 2 million to 6 million patients in 6 years
  – All age groups, slightly younger than traditional healthcare

Growth of Telehealth and Urgent Care
Access: The Pharmacist Will See You Now

CVS
- Eliminate the sale of Tobacco
- Provide Smoking Cessation Support

Prescribe Contraception
- Oregon, California, Colorado

Narcan

Additional Services
- Vision, Audiology
- Phlebotomy

What's Next
- Chronic Care?
Healthcare Disruption

• Health systems beware that they may be disrupted:
  – Patients are becoming more empowered
  – Digital health is proliferating
  – Healthcare more than episodic physician visits
  – Patients are sharing the cost burden
  – Patients are looking for alternative care services
  – Care may become a commodity