



Francine Minadeo
(212) 345-6417
francine.minadeo@oliverwyman.com

FOR IMMEDIATE RELEASE
March 16, 2016

New Oliver Wyman Survey Shows Consumers Like and Increasingly Use Retail Health Clinics

Report breaks down what arrival of this “new front door to healthcare” means for payers, providers, and retailers.

New York – March 16, 2016 – Oliver Wyman announced today the results of a new survey on consumers’ experiences with alternative sites of care, such as retail health clinics, urgent care centers, and telehealth. The report, entitled “[The New Front Door to Healthcare is Here](#),” found that more consumers across all demographics are using these alternative sites of care, and many are having good experiences.

“This has tremendous implications for the entire healthcare industry,” said Graegar Smith, principal in Oliver Wyman’s Health & Life Sciences Practice and lead author of the report. “Providing a better care experience in more convenient settings, like a local retailer or a person’s own living room, can boost patient engagement, and that can lead to higher satisfaction and better health,” he explained. “But if the ‘new front door’ isn’t designed and executed correctly, we could actually see costs rise and consumer experience decline.”

The survey findings indicate that consumers will increasingly use alternative sites. As a result, Oliver Wyman projects at least \$200 billion in current healthcare spend could flow to one or more of these alternative sites of care. “But the promise of the new front door is not about moving spending from one site to another,” Smith said. “It’s about creating an overall better healthcare system and integrating these new sites with traditional ones to delight the consumer.”

Key survey highlights include:

- 70 percent of consumers are familiar with the concept of a health and wellness clinic within a retail store. One-quarter of consumers have used a retail clinic, an 11 percentage point increase from the previous survey in 2013.

- Almost 80 percent of consumers who had visited a health and wellness clinic within a drug store, discount retail store, or grocery store within the past two years said the experience was the same or better than a traditional doctor's office. Almost 30 percent said the experience was *better or much better*.
- 57 percent of consumers are now familiar with the concept of a health and wellness visit conducted remotely via phone, voice chat, or video chat
- It's not just the young and healthy who are using alternative sites. The survey shows use across many demographic and health segments. For example, 17 percent of 18-24 year olds and 17 percent of those 65 years and older had used a retail clinic.

"Consumers have spoken; the new front door is here," Smith said. "Now it's up to healthcare providers, insurers, and retailers to build it in a way that has meaning, impact, and value."

The national online survey was conducted in late 2015 among more than 2,000 individuals sampled to be representative of key demographics including age, income, race, and geography. The sample also had a mix of individuals with commercial insurance (group and individual / exchange) and Medicaid and Medicare, as well as health statuses ranging from healthy and poly-chronic.

About Oliver Wyman's Health & Life Sciences Practice

Oliver Wyman's Health & Life Sciences practice serves clients in the pharmaceutical, biotechnology, medical devices, provider, and payer sectors with strategic, operational, and organizational advice. Deep healthcare knowledge and capabilities allow the practice to deliver fact-based solutions. For the latest on the business of transforming healthcare, visit Oliver Wyman Health digital platform at health.oliverwyman.com.

About Oliver Wyman

Oliver Wyman is a global leader in management consulting. With offices in 50+ cities across 26 countries, Oliver Wyman combines deep industry knowledge with specialized expertise in strategy, operations, risk management, and organization transformation. The firm's 3,700 professionals help clients optimize their business, improve their operations and risk profile, and accelerate their organizational performance to seize the most attractive opportunities. Oliver Wyman is a wholly owned subsidiary of Marsh & McLennan Companies [NYSE: MMC]. For more information, visit www.oliverwyman.com. Follow Oliver Wyman on Twitter @OliverWyman.

###