Over the past few years, the United States market has seen an explosion in retail health clinics. It is estimated there are now more than 2,000 health clinics operating out of pharmacies, grocery stores, and big-box stores. These around-the-corner sites of care meet people’s desire for more convenient health services and present consumers a “new front door” to care. In addition, because retail clinics can provide certain types of care in a more affordable setting than an emergency room or traditional doctor’s office, they present an opportunity to reduce health spending.

Right care in the right place at the right time is a compelling value proposition, and one that has the potential to disrupt the entire health marketplace. In fact, Oliver Wyman predicts that consumer use of alternative sites for care – such as retail clinics and telemedicine – will increase. As a result, $200 billion in current US healthcare spending could flow from traditional sites of care to these new options.

Much is at stake for all industry players, but retailers in particular, will play a significant role in the new health marketplace. With their existing customer base, brand loyalty, physical footprint, and health resources, they have an out-of-the-gate advantage. However, understanding consumers’ starting-point familiarity and comfort with retail health clinics is essential.

To gain a clearer view of the new front door landscape and what role retail health clinics may play in it, Oliver Wyman conducted a national online survey of more than 2,000 individuals spanning all demographic and health segments. The findings, which were first published in the 2016 report “The New Front Door to Healthcare is Here,” revealed that consumers’ awareness and use of retail health clinics is on the rise. What’s more, many actually find the experience there better than a traditional setting. Yet the research also uncovered that not all retailers are created equal (in consumers’ eyes). Every retailer must think strategically about pairing its offering with its customer base.

While the US healthcare market is unique, what could be interesting for other markets is the degree consumers are willing to access health in entirely new ways.