

Who Will Provide Primary Care in the Future?

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Innovations driving Healthcare Change

- Team-based care - **PCMH** (we call it PACT)
- Transactional coherent health information
- Health Management Platforms vs EMRs
- Data big and small
- Connected health
- Commoditization

What Does That Mean... Really



My insurance company notified my pharmacist

No mention of Physicians or nurses

Our Doctor was great, but...

United is an insurance company

Walgreens

Walgreens to Run ACOs

- in 2013 **Walgreens** announced that they will manage an ACO in PA and NJ
 - And in Florida, Texas and Arizona
 - Walgreens is providing occupational health for BMW, including primary care for employees, dependents and retirees
- And...
 - **CVS** is doing so in NC, CT, LA, TX
 - **Rite Aid** is doing so in NC, CA, NY, PA

Walgreens

is a large national retail pharmacy



So is CVS and Rite Aid



Target Enters the Fray with CVS

June 15, 2015

Target and CVS Health announced today that we have signed an agreement for CVS Health to acquire Target's pharmacy and clinic businesses. CVS Health will rebrand and operate Target's pharmacies through a store-within-a-store format, and Target's clinic locations will be rebranded as CVS/minuteclinic..



 **CVS**Health

 **minute clinic**

the medical clinic in CVS/pharmacy[®]

Walmart



Walmart to Provide Primary Care

- Walmart has announced that it will provide primary care in all stores within 5-7 years
 - Initially they will focus on more rural locations



Walmart is the world's largest retailer

United wants to be your primary care provider

Walgreens wants to be your primary care provider

Walmart wants to be your primary care provider

Why are a large insurance company, national retail pharmacies and big box retailer all entering the same space?

- To drive front-end sales ?
- Convenience – when and where you want
- Logistics and supply chain management
- Access to health information
 - big data = big \$

The Value of Health Data

- Stolen healthcare data can be worth 10 to 50 times more than payment card data in the cyber underground.
- Electronic health records fetch around \$50 per record, and as high as \$500 for some type of medical records versus \$1-\$2/credit card.

Healthcare data at risk: why medical records are easy to hack, lucrative to sell. Posted by [ThirdCertainty](#) on January 5, 2015 in [Editor's Picks](#), [News & Analysis](#)

So, now it gets interesting

<https://www.youtube.com/watch?v=x6XUm0dfDGs>

The Health Care Reality #1

Health care is an information business

- It's increasing - and increasingly complicated
- Most of which patients can't access
...or understand

*Healthcare thrives on **information asymmetry***

The Health Care Reality #2

- Health care functions on **the transaction**
 - Patients come to us because they have to

Few industries remain that are based on mandatory transactions

The Health Care Reality #3

Integrated healthcare systems must configure their **informatics capability** in order to undergo true transform

The current EHR construct is not sufficient for health care delivery models of the future

Documentation vs Communication

Changing Dynamics of Healthcare

- Patients engage (us) as partners in their care
 - Focus on preventive health
 - Focus on chronic disease management
 - Focus on patient-driven outcomes
 - Demand for convenient, local and timely care
 - Demand for complementary/alternative care
 - Demand for readily available information

And now it gets even more interesting

ZOCDOC

Open Table for Doctor's Visits

Self scheduling

Reviews

Guarantees



InstiMeds - Redbox for Prescriptions

- Access
- Time
- Distance
- Choice



Labs Will Be Next

Wellness FX

Labs Will Be Next

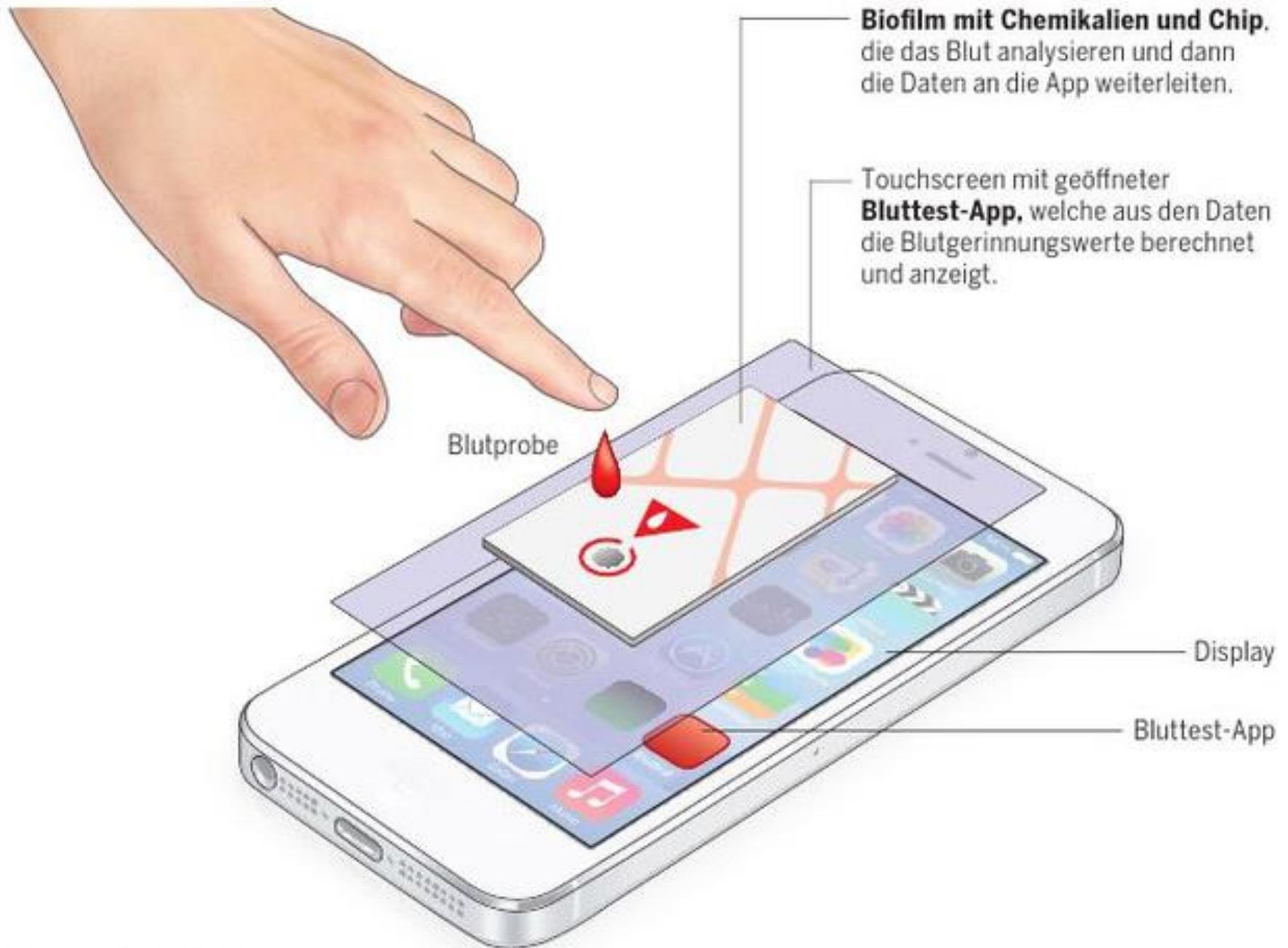
Theranos and Walgreens Expand Diagnostic Lab Testing to the Phoenix Metropolitan Area

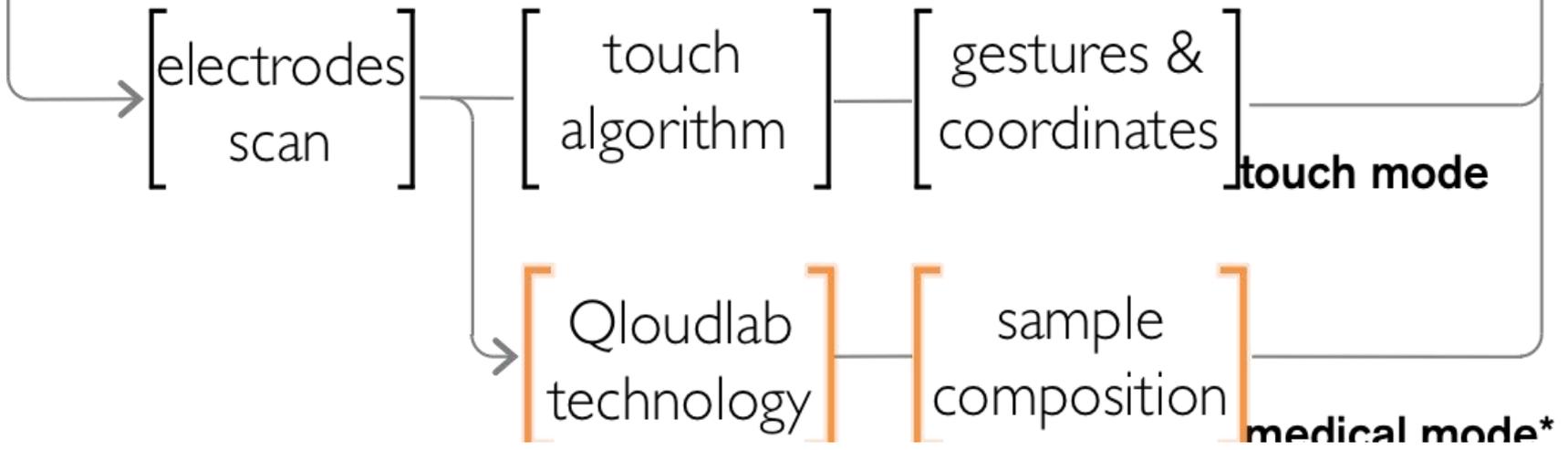
New Theranos™ Wellness Centers at Walgreens stores provide consumers with less invasive, fast, affordable testing on samples as small as a few drops of blood





At 30, Elizabeth Holmes makes her debut on the Forbes 400 as the youngest self-made woman billionaire.





Commoditization - Breatholizer

Patients Can and Do Talk

Patients Like Me

Not just another web site...

But, leveraging what works on the internet

Crowd sourcing healthcare

and, a whole new dimension to

Connected Health

Lastly, a Word About Big Data

Companies & Industries Hospitals Are Mining Patients' Credit Card Data to Predict Who Will Get Sick



**Don't lie
to me, Susan,
I know about the
2 a.m. Papa John's
deliveries**

**Bloomberg Businessweek
Companies & Industries**

**By Shannon Pettypiece and
Jordan Robertson
July 03, 2014**

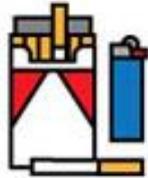
What consumer data say about your health habits

Data

Frequent credit card purchases at pizza shops and fast-food outlets



Cigarette purchases at grocery stores by consumers with bronchial problems



Frequent purchases of large amounts of alcoholic beverages



No vehicle ownership registration on file



Falloff in the frequency of drug refills shown on a charge card



Analysis

May need advice on weight control or diabetes and high blood pressure risks

Increased chance of visiting an emergency room for an asthma attack

Possibly a sign of depression

Could presage difficulty in reaching scheduled care appointments

Might require a reminder call from a nurse

Is this HIPPA protected?

Not Who Will Provide, but What Will Primary Care of the Future Be

Healthcare is an information business

Coherent and transactional - Logistics and scale
Data big and small – not just in the EMR

As **information asymmetry** is reduced then
Commoditization accelerates - *the role of AI*

Managing data and **information exchange** is the
new **value** proposition in healthcare

Consumer **behavior** will drive expectations

Barry Schwartz

The Paradox of Choice

WHY MORE IS LESS

*“The Internet created a massive choice problem and then started to solve it with reviews and recommendations
....too many reviews are as bad as no reviews”*

...the tyranny of good decisions

Matt Honan Wired 22.11

Better Information

Better Decisions

Better Health