2015 Physician Office Market Report

Description: Market-At-A-Glance

The physician office market continues to add more new initiatives to its list of priorities in order to meet the challenges of both today and the future. Physicians in large numbers are either selling their practices to become hospital employees or are merging with hospitals to form integrated delivery networks (IDNs). Those who remain in practices are juggling the effects of consumerism and the increase in the number of newly-insured, as well as the competition from retail providers.

Key Topics

The market changes listed above are further augmented by the rapid growth of both retail clinics and telehealth. Physicians are faced with increasing options and demands in the area of information technology. A result of these increasingly rapid and diverse changes is the increasing number of physicians who say they are burned out and planning to leave the field or retire. Physicians are facing similar challenges whether in private practice or in community health centers, ambulatory surgery centers or urgent care. A major change in reimbursement for physician office labs is also expected to have major impact by 2017.

Healthcare Policy

How a physician is reimbursed for services under Medicare experienced a major quality-directed overhaul in 2015, with changes to the Sustainable Growth Rate (SGR) legislation. The Physician Quality Reporting System, Value-Based Payment Modifier and Electronic Health Record Meaningful Use will all be consolidated into one Merit-Based Incentive Payment System (MIPS). The new bill will also keep the Children's Health Insurance Program funded through September of 2017.

GHX Sales Data

The data from the Global Healthcare Exchange (GHX) Market Intelligence program provides statistics on overall growth in physician office sales through distribution, as well as for top product categories by both dollars and units for the prior calendar year. Of the $40.2 billion in overall healthcare sales through distribution as reported by GHX for 2014, the physician office market represented the third largest portion of those sales, after acute care and home healthcare. Physician office sales were more than double that of long term care or treatment centers, and showed a slight increase over 2013 physician office distributed sales reported to GHX. In growth by specialties, oncology far outpaced all others, with a double-digit uptick in sales by both dollars and units.

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