ISSUE 23: SEPTEMBER 2022

MASSACHUSETTS HEALTH POLICY COMMISSION

HPC DATAPOINTS

Update on trends in urgent care centers and retail clinics

PART 1: THE LANDSCAPE OF ALTERNATIVE CARE SITES: GROWTH TRENDS, LOCATION BY REGION AND COMMUNITY INCOME, AND SERVICES AND HOURS

The HPC is issuing a two-part DataPoints issue on trends in urgent care centers and retail clinics in Massachusetts. Part 1 focuses on the recent landscape of these alternative care sites, including trends in the number of sites; location by region and community income; and services, hours, and electronic health record systems used. Part 2 will focus on shifts in patient visits, spending, and out-of-pocket costs by site of care, comparing urgent care centers, retail clinics, physician offices, hospital outpatient departments (HOPDs), and emergency departments (EDs).

Growth in the number and use of urgent care centers and retail clinics in Massachusetts has continued in recent years. These care settings offer convenient alternatives to the traditional hours, access, and costs of physician offices and EDs. During the COVID-19 pandemic, these settings played a more prominent role, becoming a frequent access point for COVID-19 testing and other services. In this issue of the HPC's DataPoints series, the HPC provides updated analyses of urgent care centers and retail clinics in Massachusetts, including trends in their ownership, locations, hours, and service offerings, as well as analyses of utilization and costs compared to other sites of care.

Retail clinics (or "limited service clinics" as regulated in Massachusetts) are typically staffed by nurse practitioners and are located within large pharmacy chain stores. Retail clinics provide a limited scope of care including vaccinations, diagnosis, treatment for conditions such as upper-respiratory and sinus infections, and some wellness exams. They are prohibited from providing surgical, dental, physical rehabilitation, mental health, substance use disorder, or birth center services. Urgent care centers — which may be licensed as clinics or hospital satellites (i.e., outpatient departments), or may operate under a physician license[i] — usually have physicians on staff and provide diagnosis and treatment for a broader range of conditions. These may include more pressing conditions such as broken bones requiring x-rays and complex chronic conditions that are not life-threatening.

Urgent care centers and retail clinics offer **convenient alternatives** to the traditional **hours**, **access**, and **costs** of physician offices and EDs.

Depending on the condition, patients may use urgent care centers and retail clinics as substitutes for a physician office or the ED. One analysis found that urgent care centers could safely treat 27% of visits that currently take place in EDs, while retail clinics could manage around 13% of these visits. More recent research analyzing the impact of urgent care center openings in Massachusetts from 2010 to 2015 found evidence of reductions in ED visits associated with urgent care centers and larger reductions in physician office visits. Most of the available literature suggests that for the type of low-acuity conditions treated in urgent care centers and retail clinics, quality of care is similar across medical settings, and patients report an overall positive experience with their care. While use of these settings may raise issues regarding continuity of care, the development of better quality measures would improve the ability to study comparisons in quality between settings.

Except where otherwise indicated, the information on retail clinic and urgent care centers used in this analysis was collected by a survey fielded in 2021 for the HPC by Massachusetts Health Quality Partners (MHQP). This is a printable version of DataPoints. The online version features interactive graphics that show additional information, and is available on the HPC's website at www.mass.gov/service-details/hpc-datapoints-series.

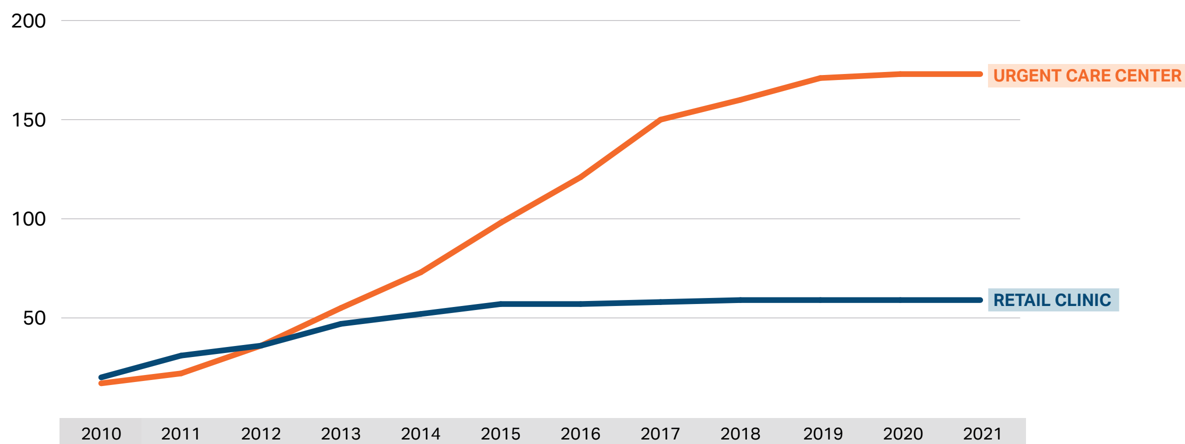
i See 105 CMR 130; 105 CMR 140.

TRENDS IN NUMBERS OF URGENT CARE CENTERS AND RETAIL CLINICS

The alternative care site market grew dramatically over the last decade in Massachusetts, although the numbers of urgent care centers and retail clinics have increased at different rates. The number of urgent care centers grew to 173 in 2021, up from 15 in 2010. The number of retail clinics totaled 59 in 2021, up from 20 in 2010. While the number of retail clinics has remained at 59 since 2018, the total number of urgent care centers in Massachusetts has grown each year, up from an estimated 160 in 2018.

In 2021, there were **173 urgent care centers** and **59 retail clinics** in Massachusetts, **up from 15 and 20** in 2010.

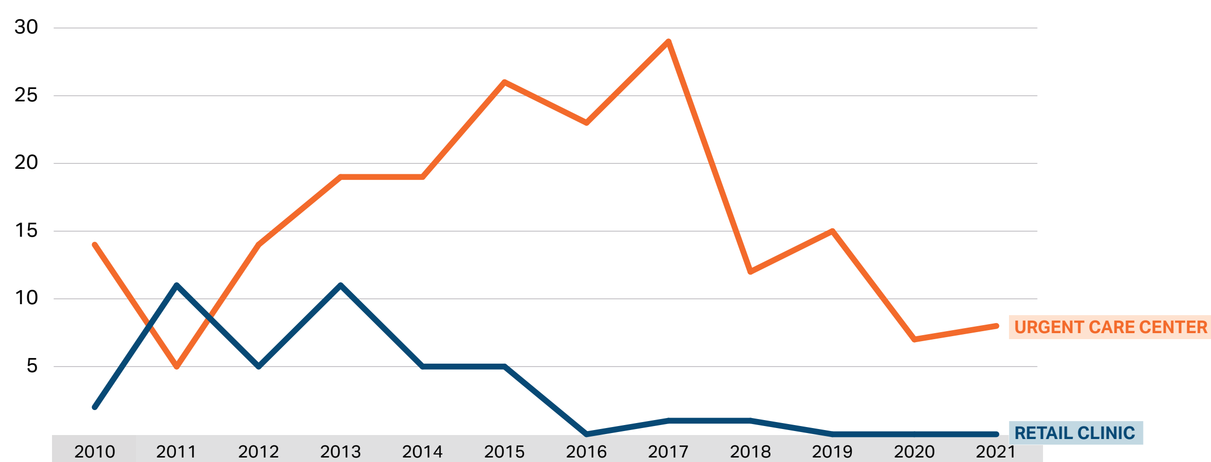
UCC and Retail Clinics in Massachusetts



Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

The total number of alternative care sites reflects both new entrants and sites that have closed. The graph below shows the number of urgent care centers and retail clinics that entered the market each year through 2021.

New urgent care centers and retail clinics by year of market entry

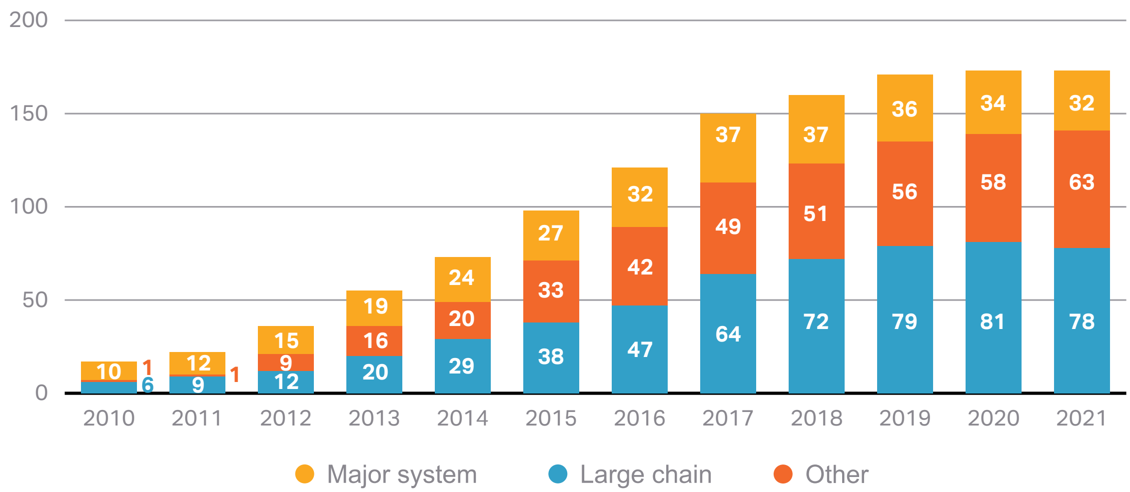


Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

In 2021, **45% of urgent care centers** in Massachusetts were operated by **major health systems**, **36%** were part of **large chains**, and **18%** were **other / independent.**

In 2021, 45% of urgent care centers were operated by major health systems, 36% were part of large chains (defined as having at least 3 locations in Massachusetts and locations out of state) such as CareWell, ConvenientMD, and American Family Care, and 18% were other / independent, including smaller chains and those operated by community health centers. In earlier years, this latter category accounted for a larger share of centers (one-third in 2014), but new entries have been dominated by centers affiliated with large chains and major health systems.

UCC type, by year opened

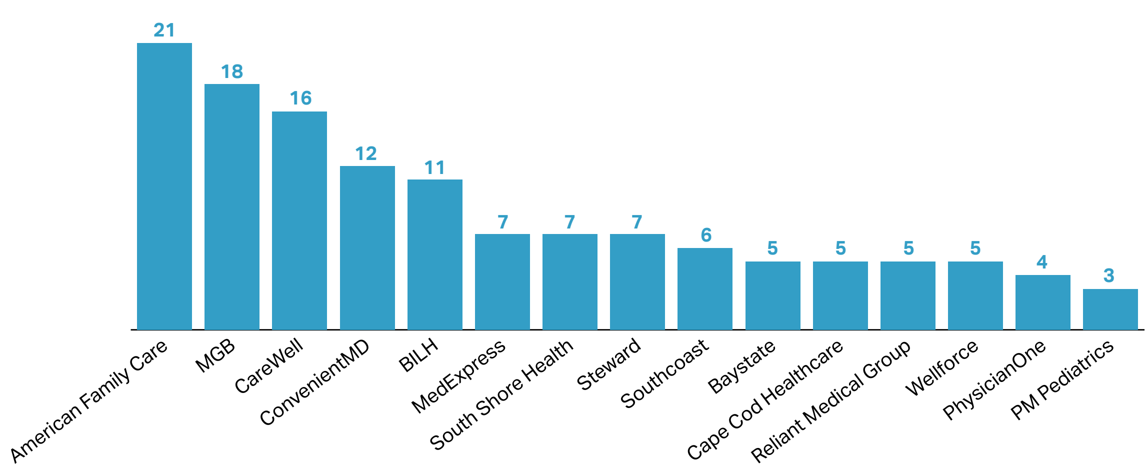


Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

In recent years, **most new urgent care centers** have been **affiliated** with **large chains** or **major health systems.**

Three national chains–American Family Care, CareWell, and ConvenientMD–and two major health systems–Mass General Brigham (MGB) and Beth Israel Lahey Health (BILH)–comprised the five largest urgent care centers in Massachusetts by ownership.[ii] There were three pediatric specialty urgent care centers in Massachusetts, all owned by PM Pediatrics and opened between 2017 and 2021. Meanwhile, all 59 retail clinics in Massachusetts were part of CVS MinuteClinic.

UCC by network, large chain and major systems, 2021



Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

All retail clinics in Massachusetts are part of **CVS MinuteClinic.**

ii All ConvenientMD locations in Massachusetts opened between 2018 and 2021

SERVICES, HOURS, AND EHR SYSTEMS

The graph below shows the range of services that urgent care centers reported offering. Services such as treatment for sports or workplace injuries, imaging, lab tests, vaccinations, and school/sports physicals were available at most centers in 2021. Most urgent care centers offered testing for COVID-19 in 2021, and only 4% did not. All retail clinics offered COVID-19 testing. While all urgent care centers served patients on a walk-in basis, most also offered telemedicine and online appointment scheduling.

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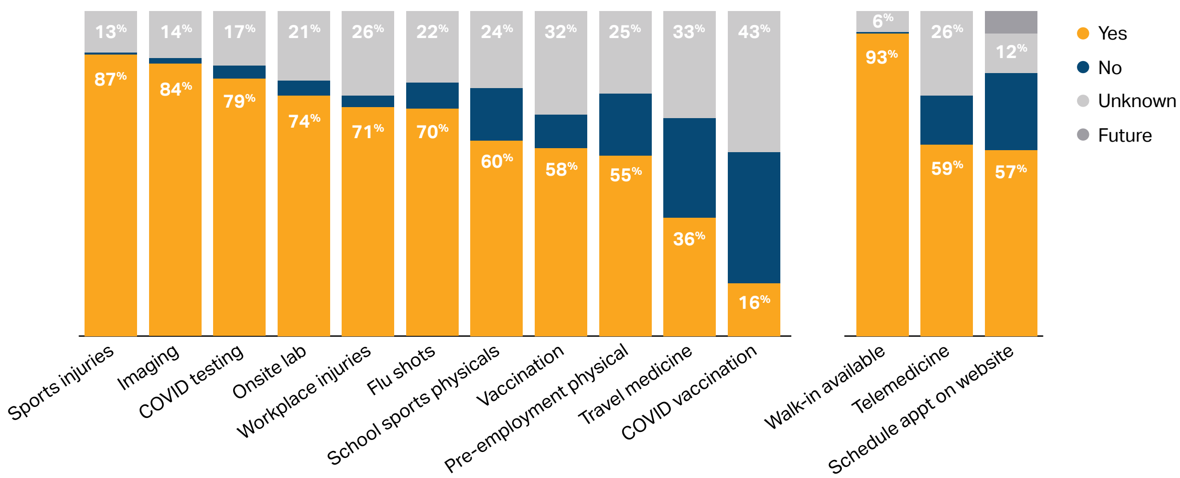
Services offered at urgent care centers, 2021



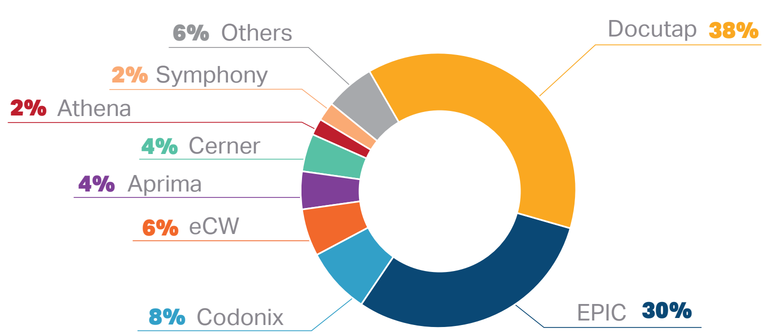
Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

While urgent care centers in Massachusetts varied in their operating hours, most were open beyond standard business hours. On weekdays, the most common operating hours (51% of centers) were 8:00AM – 8:00PM, and 64% of centers were open until 8:00PM or later. On Saturdays, the most common operating hours (25% of centers) were also 8:00AM – 8:00PM, but shorter hours were also common. Most centers had similar operating hours on Saturdays and Sundays (Sunday hours are not shown). All CVS MinuteClinics in Massachusetts were open weekdays from 8:00AM – 7:00PM, Saturdays from 9:00AM – 5:30PM, and Sundays from 9:00AM – 4:30PM.

Among centers reporting their electronic health record (EHR) systems,[iii] the most commonly used system was Docutap (38% of respondents) followed by EPIC (30% of respondents). The remaining respondents used a number of other systems.

While all urgent care centers served patients on a **walk-in basis**, most also offered telemedicine and **online appointment** scheduling.

Electronic health record systems



Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

iii 48% of urgent care centers did not report the EHR system used

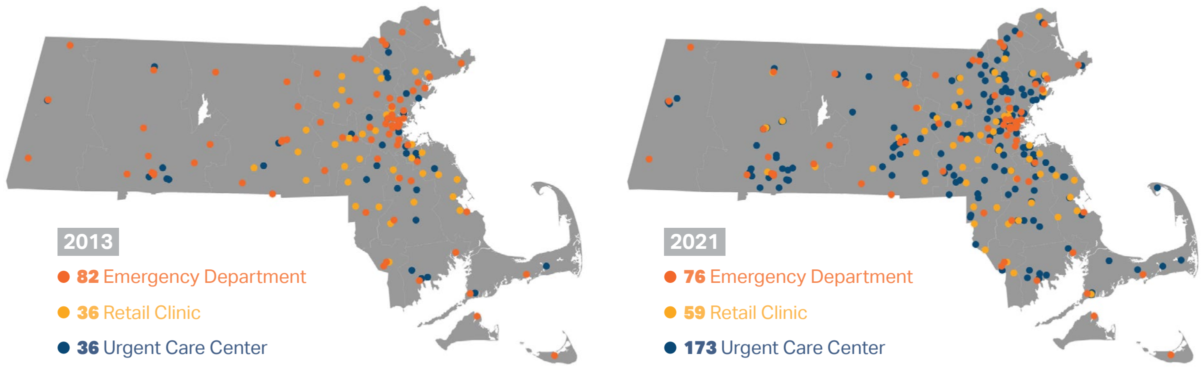
All regions in Massachusetts had **at least one urgent care center** in 2021.

Urgent care centers and retail clinics are **disproportionately located** in higher income areas. **54%** of retail clinics and **50%** of urgent care centers in 2021 were in **zip codes representing** residents with the **highest incomes.**

GEOGRAPHY OF URGENT CARE CENTERS, RETAIL CLINICS, AND EMERGENCY DEPARTMENTS

The following graphic illustrates the locations of urgent care centers, retail clinics, and emergency departments from 2013 to 2021 and highlights the growth and geographic dispersion of urgent care centers.

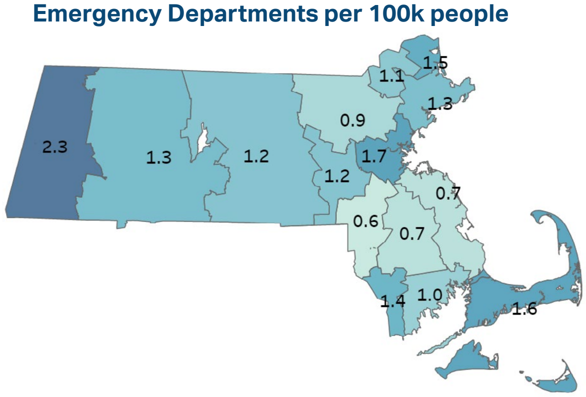
Geography of urgent care centers, retail clinics and EDs, 2013-2021



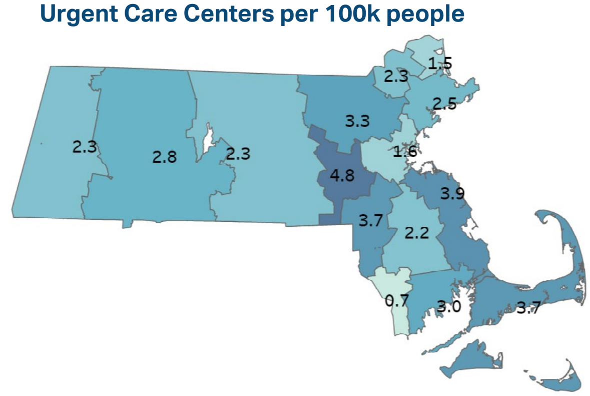
Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

The following maps illustrate the number of urgent care centers, EDs, and retail clinics per 100,000 residents in 2021 by region, as well as the number of alternative care sites per ED. All regions had at least one urgent care center in 2021 (see graph tooltip). Between 2018 and 2021, the growth in the number of urgent care centers per 100,000 residents was particularly high in the South Shore (60%), the Berkshires (50%), and the Pioneer Valley (46%). The number of urgent care centers per 100,000 residents declined most in Metro Boston (-19%).

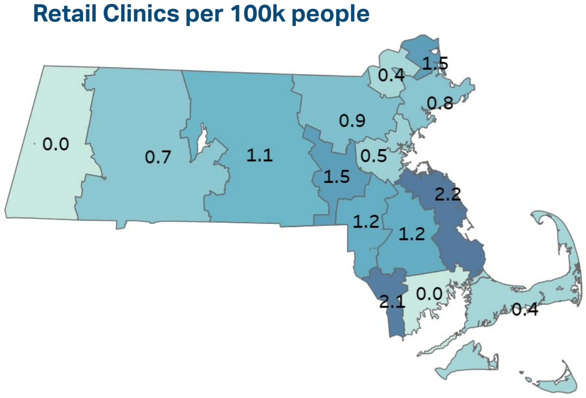
Emergency Departments per 100k people



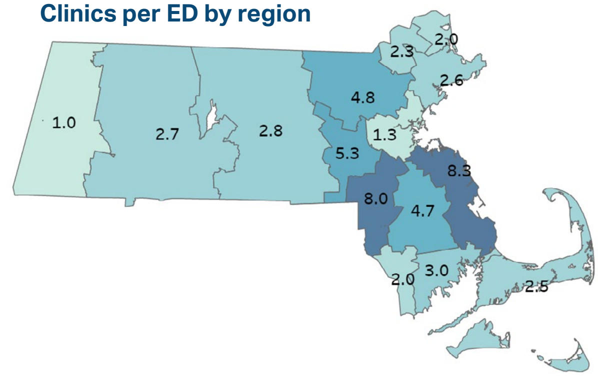
Urgent Care Centers per 100k people



Retail Clinics per 100k people



Urgent Care Centers and Retail Clinics per ED by region



Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

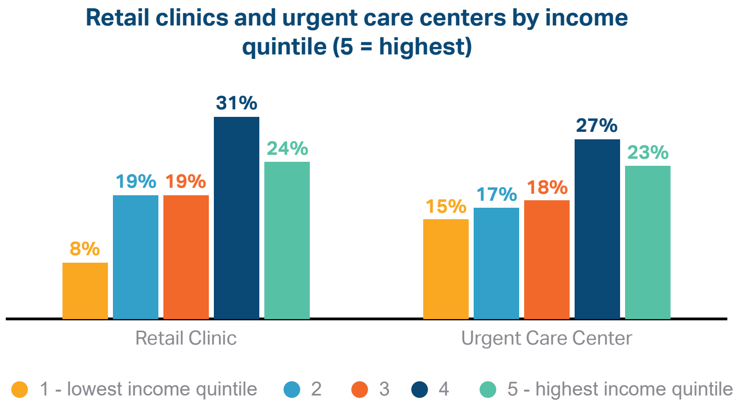
The Massachusetts Health Policy Commission (HPC) is an independent state agency charged with monitoring health care spending growth in Massachusetts and providing data-driven policy recommendations regarding health care delivery and payment system reform. The HPC's mission is to advance a more transparent, accountable, and equitable health care system through its independent policy leadership and innovative investment programs.

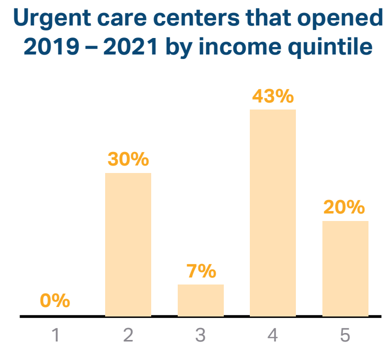
HPC DataPoints is a series of online briefs that spotlight new research and data findings relevant to the HPC's mission to drive down the cost of health care. It showcases brief overviews and interactive graphics on relevant health policy topics. The analysis underlying these briefs is conducted by HPC staff. To view all HPC DataPoints, visit our website.

Suggested citation:
Massachusetts Health Policy Commission. DataPoints Issue 23: Update on trends in urgent care centers and retail clinics, Part 1. August 2022. Available at: https://www.mass.gov/info-details/hpc-datapoints-issue-23-update-on-trends-in-urgent-care-centers-and-retail-clinics-part-one

URGENT CARE CENTER AND RETAIL CLINIC LOCATION BY INCOME

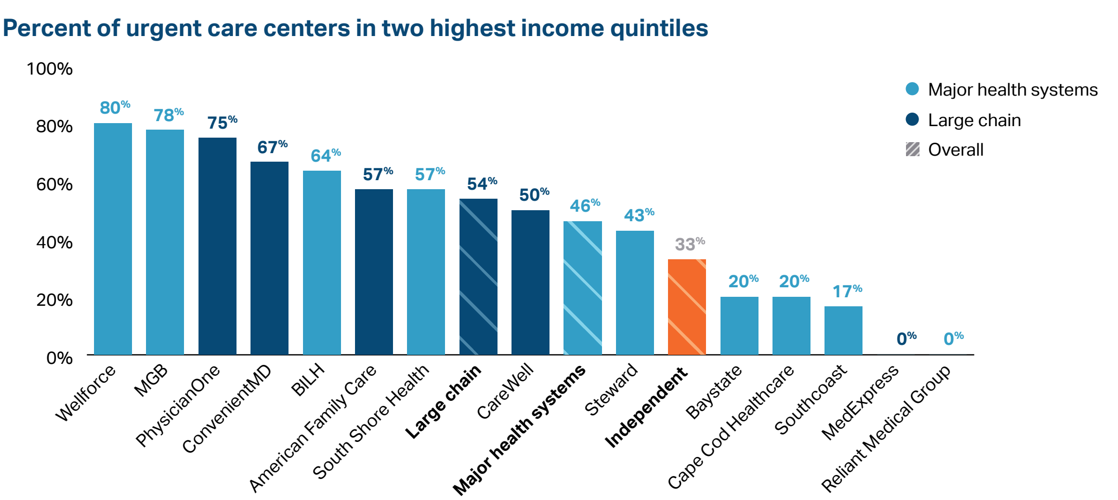
The HPC examined the level of income of the communities in which retail clinics and urgent care centers are located and found that, while urgent care centers were more broadly distributed by community level of income than retail clinics, both types of sites were disproportionately located in higher income areas. In 2021, 54% of retail clinics and 50% of urgent care centers were in zip codes representing residents with the highest incomes (the 4th and 5th income quintiles comprising 40% of the state population). 63% of urgent care centers that opened between 2019 and 2021 were located in these highest income zip codes.





Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021

Among urgent care centers that were part of large chains, 54% were located in areas with the highest incomes, with notable variation by chain. Of the 21 American Family Cares centers (the largest chain), 57% were located in zip codes with the highest incomes. In contrast, all of MedExpress' seven centers were located in zip codes at or below the median income. Among urgent care centers that are part of major health systems, 46% were located in areas with the highest incomes, also with a high degree of variation by health system. 78% of MGB's 18 urgent care centers (the largest health system) were located in the highest income zip codes. 64% of BILH's 11 centers (the next largest system) were located in the highest income zip codes. In contrast, all of Reliant's five centers were located in zip codes at or below the median income. Independent urgent care centers were disproportionately located in areas with lower incomes, as only 33% of them were found in the highest income zip codes.



Sources: Massachusetts Health Policy Commission urgent care center and retail clinic survey, 2021
Notes: The graph displays ownership with at least four urgent care centers in Massachusetts, and does not display PM Pediatrics, which has three centers. All of the urgent care centers affiliated with PM Pediatrics were located in the highest income areas.