RAPID EXPANSION OF URGENT CARE CENTERS IN MASSACHUSETTS

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OBJECTIVE

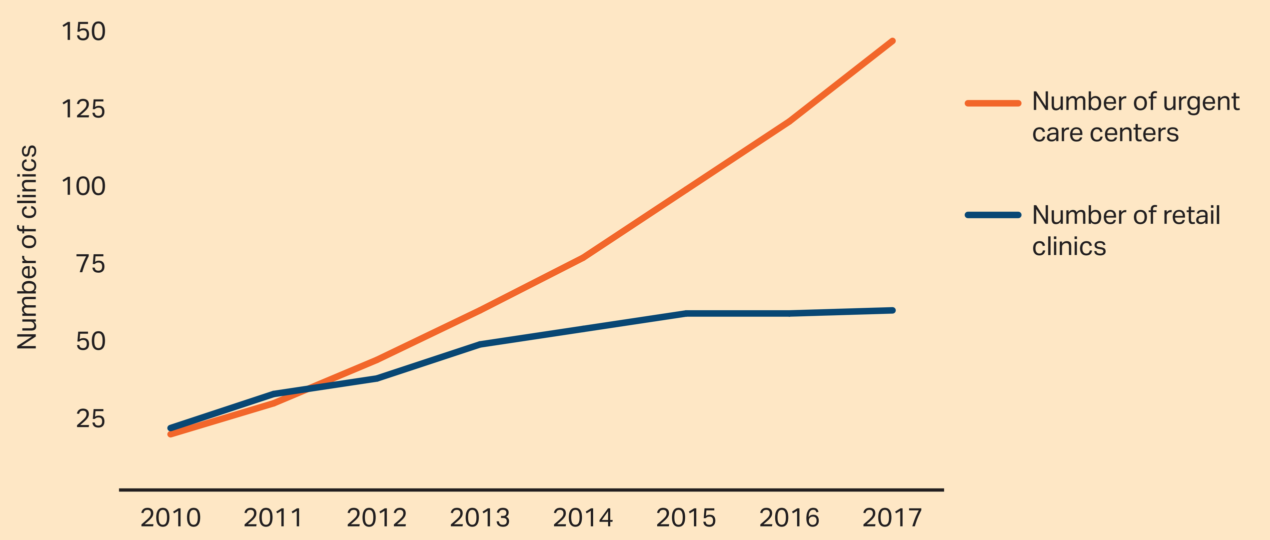
The growth of retail clinics and urgent care centers, both in Massachusetts and around the nation, represents an effort to provide alternative, convenient points of access to health care beyond the traditional hours and sites of physician offices, community health centers, and hospitals. Greater access to these alternative care sites holds the promise of reducing avoidable and costlier emergency department (ED) visits. Given anecdotal evidence of a rapid rise in urgent care centers in recent years, **the HPC sought to understand the growth of urgent care centers and retail clinics in Massachusetts and some of the implications of this important trend in health care delivery.**

STUDY DESIGN

The HPC identified urgent care centers using a number of sources, including licensure data from the Massachusetts Department of Public Health (MDPH), NPI data from the Centers for Medicare and Medicaid Services (CMS), insurers' online directories of providers, and the websites of the clinics themselves and their affiliated organizations. When necessary, HPC staff called centers directly to establish their date of opening, hours of service, and, in some cases, their scope of services. Identification of retail clinics was simpler, due in part to their licensure as limited services clinics with MDPH, and because CVS Minute Clinics are the only retail clinics currently operating in the Commonwealth. HPC staff analyzed costs associated with urgent care centers, retail clinics, EDs, and physician offices using claims data from the 2015 Massachusetts All Payer Claims Database (APCD).

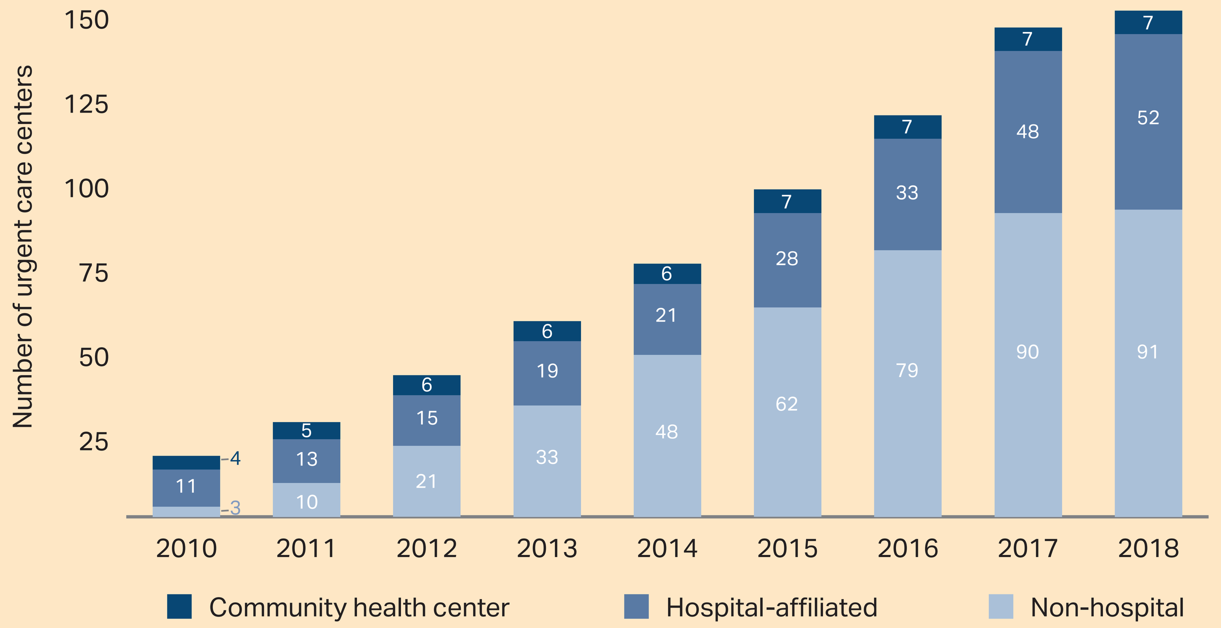
RESULTS

TRENDS IN NUMBERS OF URGENT CARE CENTERS AND RETAIL CLINICS IN MASSACHUSETTS, 2010-2018



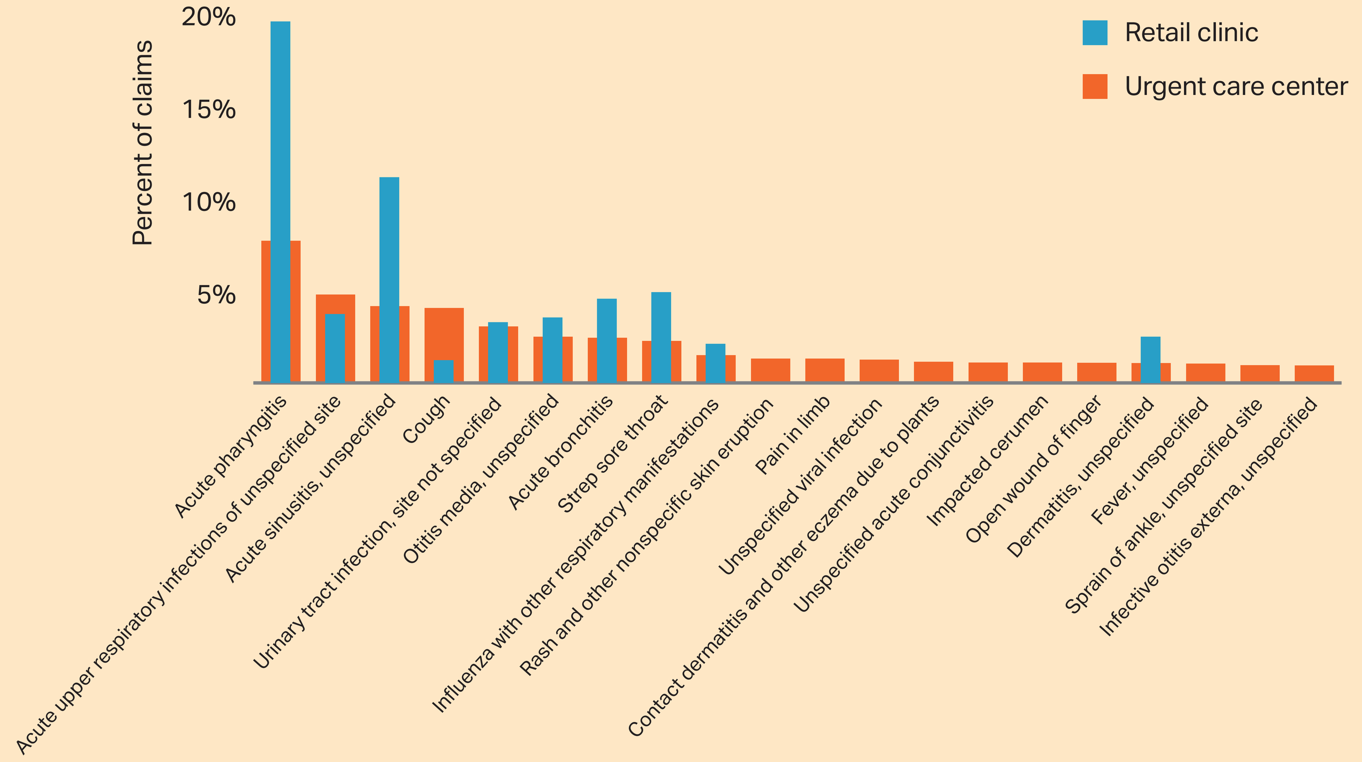
- The number of retail clinics nearly tripled within a decade, from 20 clinics in 2010 to 57 in 2018.
- The number of urgent care centers grew even more dramatically, from 18 in 2010 to 145 by the end of 2017.

NUMBER OF URGENT CARE CENTERS BY AFFILIATION TYPE, 2010-2018



- In 2010, most urgent care centers were affiliated with hospitals, but by 2018, most (61%) were part of non-hospital-based chains such as American Family Care (with 21 centers) and Carewell Urgent Care (with 16 centers).
- However, hospital-based centers surged again in 2017 and 2018, led by Partners HealthCare (n=16 by 2018).

SERVICES PROVIDED AT URGENT CARE CENTERS, RETAIL CLINICS, AND EMERGENCY DEPARMENTS IN MASSACHUSETTS, 2016



- Almost 20% of retail clinic visits are for acute pharyngitis (sore throat), with acute sinusitis accounting for another 11% of visits.
- Urgent care centers see a wider range of patient conditions, with the top two (acute pharyngitis and acute upper respiratory infection) comprising only 13% of visits. Pains, wounds, and ankle sprains make the top 20 list for urgent care centers, but are not typically treated at retail clinics.[1]

VISIT COSTS AT URGENT CARE CENTERS, RETAIL CLINICS, AND EMERGENCY DEPARMENTS IN MASSACHUSETTS, 2016

	ALL CONDITIONS		LOW ACUITY CONDITIONS	
	Total spending	Cost sharing	Total spending	Cost sharing
Emergency department	$1220	$164	$899	$162
Physician's office	$165	$24	$166	$15
Retail clinic	$69	$20	$78	$25
Urgent care center	$172	$35	$166	$34

- Visit costs, both for total spending and cost sharing, are starkly different by care site.
- Average visit costs were far lower at retail clinics and urgent care centers than EDs, even for similar conditions.

CONCLUSIONS

- Urgent care centers have spread rapidly in the last 8 years in Massachusetts as in other areas of the country, promising low-cost care for urgent medical conditions at convenient hours and locations without appointments.
- Urgent care centers are significantly lower cost than emergency departments, similar in cost to physician offices, and higher cost than retail clinics.
- Most of the urgent care centers that have opened recently are affiliated with a hospital, unlike trends for the previous several years.

POLICY AND PRACTICE IMPLICATIONS

- Urgent care centers, like retail clinics, represent an additional point of access to health care for patients needing care at locations near where they work and live, at convenient evening and weekend hours, and when an immediate need arises.
- It is unclear to what extent urgent care visits are replacements for emergency department visits, visits to physician offices or other sites, or new visits that would not have taken place otherwise.
- Hospital systems may be opening or buying centers as part of a strategy to retain patients and prevent leakage. In addition some hospital-based centers have been identified as charging added facility fees that patients may not expect. Additional research is needed to better understand the trend and implications of growth in hospital-based urgent care centers versus others.

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1. Rudavsky R, Pollack CE, Mehrotra A. "The geographic distribution, ownership, prices, and scope of practice at retail clinics." *Annals of internal medicine* 151.5 (2009): 315-320.