Health Care on Aisle 7: The Impact of Retail Clinics on Health Care and Your Practice

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Agenda

• Background on retail clinics and other innovations
• What is known on their impact
• What it might mean for your practice
Convenience Revolution in Simple Acute Care

• Multitude of new care options
  – Urgent care centers
  – Worksite clinics
  – eVisits
  – Kiosks

• Drivers
  – Societal trend of convenience
  – Poor access to primary care
  – Emphasis on guidelines

Mehrotra, JAMA, 2013
Typical “Menu” at a Retail Clinic

**Common Illnesses**
- Allergies (ages 6+) $59
- Pneumonia (females, ages 12-65) $59
- Bronchitis (ages 10-65) $59
- Ear Infections $59
- Pink Eye & Sheds $59
- Sinus Infections (ages 6+) $59
- Ear, Ear (additional lab charges may apply) $59
- Swimmer’s Ear $59

**Wellness & Prevention**
- Camp Physical* $59
- Health Screening Package* $59
- Cholesterol Screening* $59
- Diabetes Screening* $59
- Hypertension Screening* $20
- Breast Screening* $20
- Smoking Cessation* - Initial Visit $20
- - Follow Up Visits $19

**Additional Services**
- Ear Wax Removal $59
- Flu Diagnosis (ages 10-65) $33
- Mononucleosis $59
- Pregnancy Testing $40
- Suture Removal $59
- TB Testing* $15

1,700 Clinics Have Opened Across the US

![Map of the US showing retail clinic locations.](image)

Rudavsky, Pollack, Mehrotra, Annals of Internal Medicine, 2009
Rapid Increase in Retail Clinic Use
(visits per 100 people per year)

Clinic Locator

Massachusetts

Select a city to see a list of clinic(s).

Acton (1)  Danvers (1)  Medway (1)  Swansea (1)
Amesbury (1)  Dedham (1)  Natick (1)  Taunton (1)
Amherst (1)  Fall River (1)  Newton (1)  Tewksbury (1)
Andover (1)  Franklin (1)  North Attleboro (1)  Uxbridge (1)
Ashland (1)  Grafton (1)  Northborough (1)  Watertown (1)
Beverly (1)  Greenfield (1)  Norton (1)  Wellesley (1)
Braintree (1)  Hanover (1)  Plymouth (1)  Westford (1)
Bridgewater (1)  Hudson (1)  Quincy (1)  Weymouth (1)
Brockton (1)  Kingston (1)  Rockland (1)  Wilmington (1)
Cambridge (2)  Marshfield (1)  Salem (1)  Worcester (1)
Carver (1)  Maynard (1)  Seekonk (1)
Charlton (1)  Medfield (1)  Stoughton (1)
Clinton (1)  Medford (1)  Sudbury (1)
Majority of Retail Clinic Visits Are for a Limited Number of Conditions

<table>
<thead>
<tr>
<th>Condition</th>
<th>% of Retail Clinic Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upper respiratory illnesses</td>
<td>27</td>
</tr>
<tr>
<td>Sore throat</td>
<td>21</td>
</tr>
<tr>
<td>Immunizations</td>
<td>20</td>
</tr>
<tr>
<td>Otitis media / externa</td>
<td>13</td>
</tr>
<tr>
<td>Eye infection (pink eye)</td>
<td>5</td>
</tr>
<tr>
<td>Urinary tract infection</td>
<td>4</td>
</tr>
<tr>
<td>Screening lab test or blood pressure check</td>
<td>1</td>
</tr>
<tr>
<td>Total, ten top reasons for retail clinic visits</td>
<td>90</td>
</tr>
</tbody>
</table>

Mehrotra et al., Health Affairs, 2008

Current State of Retail Clinic Industry

- Majority of clinics run by 3 large for-profit companies
  - MinuteClinic (CVS)
  - Healthcare Clinic (Walgreens)
  - Little Clinic (Kroegers)
- Smaller fraction run by large systems (Geisinger, Mayo Clinic, SutterHealth)
- “Co-branding” of WalMart or other clinics by hospitals (UCLA, Cleveland Clinic)

Rudavsky, Pollack, Mehrotra, Annals of Internal Medicine, 2009
Many See Great Promise in Retail Clinics

• Promoted by politicians and policymakers
• WSJ February 2013 “...consider opportunities to shift more care to less-expensive venues, including for example, ‘Minute Clinics’ ”...
• Potential benefits:
  — Improve access for all patients
  — Safety net provider for the underserved
  — Decrease non-urgent ED visits

Concerns From Physician Organizations

• AAP reissued policy statement which states, “The AAP continues to oppose RBCs as a source of primary care for pediatric patients”
• AMA tried to prevent retail clinics from opening in several states
• AAFP’s 2010 policy statement strongly opposes expansion of care into management of chronic illnesses
### Ongoing Debate

<table>
<thead>
<tr>
<th>Issue</th>
<th>Positives</th>
<th>Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality</td>
<td>• Follow guidelines, thus ensuring quality</td>
<td>• Deliver poor quality services</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Overprescribe antibiotics</td>
</tr>
<tr>
<td>Access &amp; PCP Relationships</td>
<td>• Improve access for all patients</td>
<td>• Undermine patient-doctor relationships</td>
</tr>
<tr>
<td></td>
<td>• New safety-net provider</td>
<td>• Decrease use of preventive care</td>
</tr>
<tr>
<td>Costs</td>
<td>• Decrease ED visits</td>
<td>• Increase costs due to unnecessary follow-up</td>
</tr>
<tr>
<td></td>
<td>• Decrease overall costs</td>
<td></td>
</tr>
</tbody>
</table>

### Ongoing Debate

- Quality
- Access & PCP relationships
- Costs
Antibiotic Prescribing Rates Are Similar

Mehrotra et al., Annals of Internal Medicine, 2009

Fraction of Patients with One or More Follow-up Appointments Is Similar
Quality of Care in Retail Clinics is the Same or Better as Found in Other Settings

Quality Findings Consistent With Other Research

• Patient satisfaction very high

• Quality
  – Follow-up visit rates lower
  – Care concordant with guidelines

1 Harris Interactive
2 Rohrer, Qual Manag Health Care, 2008
3 Woodburn, AJMQ, 2007
Ongoing Debate

- Quality
- Access & PCP relationships
- Costs

Large Fraction of US Population Has Access to a Retail Clinic

- Almost 90% of clinics in urban areas
- 38% of urban population within 10 min drive
  - Nashville 94%
  - Minneapolis 96%
  - Las Vegas 92%
- Few clinics in underserved areas
  - 13% of clinics in Health Professional Shortage Areas (HPSAs) compared to 21% of population

Rudavsky, Mehrotra, JABFM, 2010
Younger Adults Dominant Users

Patients Less Likely to Use Insurance for Retail Clinic Visits Compared to Other Settings

Mehrotra et al., Health Affairs, 2008
Few Retail Clinic Patients Report Having a Primary Care Physician

Do Retail Clinics Undermine PCP Relationships?

- First Contact Care
- Continuity
- Prevention
- Chronic Illness Care
After First Visit to a Retail Clinic, Many Patients Go Back to the Clinic

- PCP: 61%
- Retail Clinic: 39%
- ED: 0.2%

Reid et al. JGIM, 2012

Impact on PCP Continuity: 8% Fewer Patients Have a PCP Visit

Reid et al. JGIM, 2012
Impact on Preventive Care:  
No Negative Impact on Breast Cancer Screening

Summary of Impact on Access & PCP Relationships

- Retail clinics are not improving access to underserved communities
- Retail clinics attract a different patient population
- Often no PCP relationship to disrupt
- Impact on PCP relationships
  - Negative impact on first-contact care
  - Modest negative impact on continuity
  - No impact on preventive care or chronic disease care

Reid et al. JGIM, 2012
Ongoing Debate

- Quality
- Access & PCP relationships
- Costs

Significant Per Episode Cost Savings at Retail Clinics

Mehrotra et al., Annals of Internal Medicine, 2009
### Summary of Impact on Healthcare

<table>
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<th>Issue</th>
<th>Our Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality</td>
<td>Little evidence to support concerns</td>
</tr>
<tr>
<td></td>
<td>Antibiotic prescribing is similar</td>
</tr>
<tr>
<td>Access &amp; PCPs</td>
<td>Retail clinics serve different population than physicians</td>
</tr>
<tr>
<td></td>
<td>Modest negative impact on PCP relationship</td>
</tr>
<tr>
<td></td>
<td>No impact on preventive and chronic disease care</td>
</tr>
<tr>
<td>Costs</td>
<td>Per condition, there are substantial savings</td>
</tr>
</tbody>
</table>

### Implications for Innovations in Delivery

- **Tele-medicine**
- **Urgent Care Centers**
- **Teladoc**
- **eVisits**
- **Worksite clinics**
New Innovations and Your Practice

• Why do patients go to these new options:
  – Don’t have a PCP
  – Like their PCP, but cannot get timely appointment
  – Like their PCP, but appointment is inconvenient
  – If they have a high-deductible plan, costs

• What can practices do
  – Improve access
  – Walk-in hours on weekends, mornings
  – Make costs clearer

If you can’t beat them, join them

• Geisinger and numerous other health systems have opened up their own retail clinics

• UPMC and HealthPartners have opened up their own eVisits and internet-based clinics

• Cleveland Clinic and more than 20 other hospital systems has developed strategic partnership with retail clinics
Hub and Spoke Model

What I don’t recommend

• Banning follow-up care for retail clinic or urgent care center visits

• Balance patients’ need for access with physicians’ desire to serve as patients’ medical homes

• Encouraging communication

• Make office a better alternative
Questions?

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