

The Geographic Distribution, Ownership, Prices, and Scope of Practice at Retail Clinics

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Background: Retail clinics are clinics within a retail store that provide simple acute and preventive care services for a fixed price without an appointment.

Objective: To describe characteristics of retail clinics, including their location, scope of practice, prices, acceptance of insurance, and ownership, and to estimate the proportion of the U.S. population that lives within a short driving distance of such a clinic.

Design: Cross-sectional descriptive study.

Setting: United States.

Participants: All 982 retail clinics operating as of August 2008.

Measurements: Population living within a 5- and 10-minute driving distance of a retail clinic.

Results: In August 2008, 42 operators ran 982 clinics in 33 states; 88.4% were located in urban areas. Nearly half (44%) of all clinics were located in 5 states (Florida, California, Texas, Minnesota, and Illinois). All offered sore throat treatment (average price, \$78) and

more than 95% offered treatment of skin conditions, immunizations, pregnancy testing, and lipid or diabetes screening. Almost all (97%) accepted private insurance and Medicare fee-for-service (93%). Among 42 clinic operators, 25 are existing health care companies that operate 11% of the clinics, and 3 are for-profit retail chains that operate 73% of the clinics. An estimated 10.6% of the total U.S. and 13.4% of the urban U.S. population lives within a 5-minute driving distance of a retail clinic, whereas 28.7% (total) and 35.8% (urban) live within a 10-minute driving distance.

Limitation: Our inventory of clinics stopped in August 2008 and estimates of proximity are based on 2000 census data.

Conclusion: Retail clinics are positioned to provide immunizations and care for simple acute conditions for a substantial segment of the urban U.S. population.

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Retail clinics are clinics physically located within retail stores, such as grocery stores, drugstores, and “big box” stores (such as Wal-Mart) (1–3), that provide walk-in care for a limited number of acute illnesses and preventive care services (4). Generally staffed by nurse practitioners, retail clinics focus on patient convenience by requiring no appointment and offering night and weekend hours. The costs for care are fixed, known to the patient before care is received.

The number of retail clinics increased more than 10-fold from 2006 to 2008 (5), and an estimated 3 million patients had visited retail clinics by 2008 (3). Some physician societies have expressed concern about the growth in retail clinics (6–8), whereas many policymakers cite their potential to improve access to care and decrease costs (2, 7, 9–16).

To characterize this new health care delivery system, we describe the geographic distribution of retail clinics and their scope of services, prices, insurance policies, and ownership, and we estimate the proportion of the population that has easy access to a clinic.

METHODS

Inventory of Retail Clinics

We defined “retail clinics” as those that were located in a retail store and staffed by nurse practitioners or physician assistants and that offer a limited menu of services with prespecified, fixed prices. Using this definition, we compiled a list of retail clinic operators (owners) between June

and August 2008 by using a 2007 foundation report on the retail clinic model (1); the membership list of the Convenient Care Association, the retail clinic industry trade group (www.ccaclinics.org); and the Web site of Merchant Medicine, an organization that provides consultation services to the retail clinic industry. We included 17 operators whose clinics met fewer than the 3 criteria but otherwise fit the model (2 clinics used physician providers; 13 operated their clinics outside a retail store but within a retail setting, such as a shopping plaza; and 2 did both). Two retail clinic industry experts, one the author of several reports that describe the retail clinic industry (1, 3, 17, 18) and the other an employee of the retail clinic industry trade group, reviewed our initial list. At their suggestion, we examined 6 other operators and included 3, for a final sample of 42 operators and 982 retail clinics.

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Appendix Tables
Conversion of graphics into slides
Audio summary

Context

Little is known about retail clinics in the United States.

Contribution

The investigators found that nearly all U.S. retail clinics offer care for common symptoms (such as sore throat and cough), immunizations, and routine screening tests (such as lipid and glucose levels). Most are in urban locations, and about half are in 4 states. The investigators estimate that one third of the U.S. population resides within a 10-minute driving distance of a retail clinic.

Caution

The findings apply only to retail clinics operating in 2008.

Implication

About one third of the U.S. population resides near a retail clinic that provides basic acute and preventive care.

—The Editors

Retail Clinic Characteristics

We collected information from the operators' Web sites on the scope of their clinics' services, ownership, and prices charged for 2 commonly offered services: sore throat visit and adult tetanus booster vaccine. We also collected information on hours of operation and accepted insurance plans for a random sample of 100 of the 982 clinics. We contacted the operator directly for information when it was not available or was ambiguous on the Web site. If a clinic accepted any type of Medicaid insurance, including Medicaid managed care, we classified it as accepting Medicaid. Two of the 100 locations have closed since we collected the original study data, so we report data on hours and insurance for 98 clinics.

Mapping of Retail Clinics and Retail Clinic Catchment Areas

We obtained clinic addresses from operator Web sites and used GIS ArcInfo, version 9.3 (ESRI, Redlands, California) to map the location of each clinic.

To assess the proportion of the U.S. population that has easy access to retail clinic services, we defined the catchment area around each retail clinic to be a 5-minute driving distance in each direction, because research (19) has used 5 minutes as the time persons are willing to travel to some retail stores. We used the ArcGIS Network Analysis service area tool in GIS ArcInfo to define point boundaries for the area around the clinic in every direction on the basis of road travel and to create a boundary loop by making linear connections between the point boundaries. The calculated travel time incorporates average driving speed on the type of road (for example, faster speeds on highways) but does not incorporate typical traffic levels. We also used a 10-minute driving distance catchment area to provide less conservative estimates.

To estimate the proportion of the entire population that lives in a retail clinic catchment area, we used data from the 2000 U.S. Census and totaled the population of census blocks for which the centroid was in the catchment area. Because most retail clinics are located in urban areas, we also estimated the proportion of the U.S. urban population that lives within retail clinic catchment areas. The U.S. Census Bureau defines "urban areas" as regions with a population more than 500 to 1000 persons per square mile and adjoining areas (20).

Role of the Funding Source

This work was supported by a grant from the California Health Care Foundation. The funding source had no role in the design and conduct of the study; the collection, management, analysis, and interpretation of the data; or the preparation, review, or approval of the manuscript.

RESULTS**Location of Retail Clinics**

The **Figure** maps the location of the 982 retail clinics operating in the United States as of August 2008 (**Table 1**). Most (88.4%) were in urban areas, and most (73.2%) were located in drug stores, followed by grocery stores (15.2%); other retail settings, such as Wal-Mart or Target (7.2%); and such locations as shopping plazas, malls, government buildings, or airports (4.4%) (**Table 1**). (**Appendix Table 1**, available at www.annals.org, lists the location of clinics by operator.) Nine hundred fifteen retail clinics (93.3%) were located in a store with a pharmacy (either a drugstore, grocery store, or other retail setting).

More clinics were located in the South (425 clinics [43%]) and Midwest (304 clinics [31%]) than in the Northeast (91 [9%]) and West (162 [16%]). Almost half (44%) of the clinics were in Florida (134 clinics [13%]), California (89 [9%]), Texas (75 [8%]), Minnesota (70 [7%]), and Illinois (64 [7%]) (**Table 2**). Sixteen states and Washington, DC, had no retail clinics. **Appendix Tables 2 and 3** (available at www.annals.org) list the number of clinics and operators in each state and region.

Scope of Services

Operator information suggested that all clinics (100%) offered treatment of minor infections, such as sore throat and cough; most offered treatment of minor skin conditions (99.7%); immunizations (98.9%); routine preventive health examinations or preventive screening, such as cholesterol testing or diabetes screening (96.2%); pregnancy testing (96.0%); or treatment of allergies (95.6%). Less commonly, the clinics offered smoking cessation counseling (57.6%), travel-related services (4.8%), HIV or sexually transmitted disease testing or counseling (3.0%), prescription refills (1.6%), or weight loss counseling (1.2%).

Prices and Insurance

For a sore throat visit, operators charged an average of \$78 (range, \$35 to \$254). For an adult tetanus booster, the

average price was \$63 (range, \$15 to \$254). The average price across operators, weighted by the number of clinics run by the operator, was \$59 for a sore throat visit and \$39 for an adult tetanus booster vaccine. In our random sample of 98 clinics, almost all (97%) accepted private insurance and Medicare fee-for-service (93%), and 60% accepted some form of Medicaid (including Medicaid managed care). In a random sample of 98 clinics, all had weekday and weekend hours, and 95 (97%) had evening hours (after 6 p.m.) on weekdays.

Clinic Ownership

Among the 42 different clinic operators, 26 (62%) are existing health care companies (hospital chains or physician groups, such as MayoClinic and SutterHealth). They operate 12% of the retail clinic locations and often partner with retail stores to house the clinics. Three retail clinic operators, which are fully owned subsidiaries of for-profit retail chains (CVS [MinuteClinic], Walgreens [Take Care Clinics], and Target [TargetClinic]), operate 73% of clinics. Thirteen of the retail clinic operators are for-profit companies that partner with retail stores to house their clinics or have clinics outside a retail store (for example, AeroClinic has 2 locations in airports). **Appendix Table 4** (available at www.annals.org) breaks down the clinic operators by type.

Proportion of Population That Can Access a Retail Clinic

We estimate that 29.9 million persons (10.6% of the total U.S. population of 281.4 million) live within a 5-minute

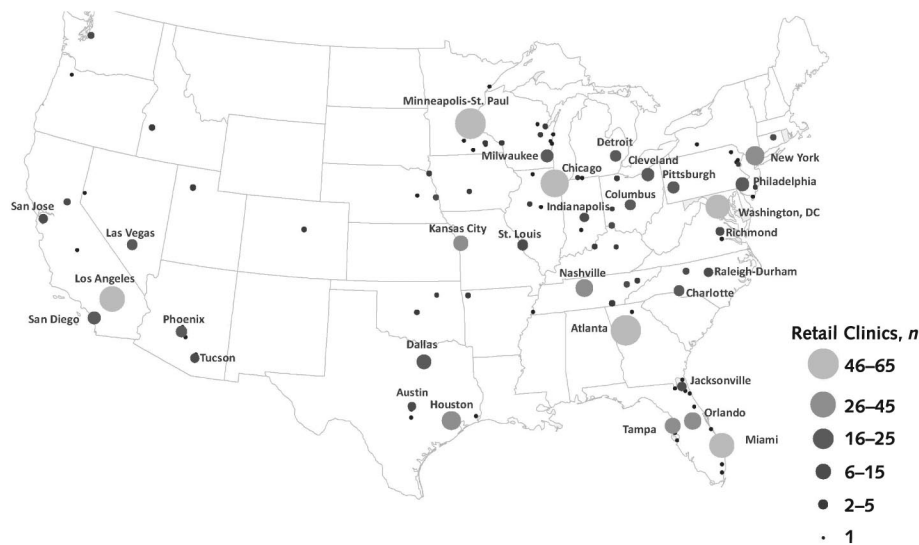
driving distance of a retail clinic and 80.7 million persons (28.7%) live within a 10-minute driving distance, although the proportions vary widely by state (**Table 2**). The 5 states with the highest percentage of their population living within a retail clinic catchment area are Nevada (34.1% within a 5-minute driving distance and 70.9% within a 10-minute driving distance), Minnesota (28.1% and 54.4%), Illinois (24.3% and 57.7%), Florida (23.4% and 50.7%), and Maryland (20.9% and 55.6%).

These proportions are slightly higher for the U.S. urban population. We estimate that 29.7 million persons (13.4% of the U.S. urban population [222.4 million persons]) live within a 5-minute driving distance of a retail clinic and 79.6 million persons (35.8%) live within a 10-minute driving distance. The 5 cities with the highest percentage of their population living within a retail clinic catchment area are Nashville (57% within a 5-minute driving distance and 94% within a 10-minute driving distance), Minneapolis–St. Paul (51% and 96%), Las Vegas (51% and 96%), Milwaukee (44% and 89%), and Miami (43% and 85%). **Appendix Table 5** (available at www.annals.org) lists the 50 cities with the largest populations and proportions that live within a retail clinic catchment area.

DISCUSSION

As of August 2008, 42 operators managed 982 retail clinics in the United States—almost half of which were

Figure. Location of retail clinics in the United States.



Each circle represents a Combined Statistical Area (CSA) or Metropolitan Statistical Area (MSA), as defined by the U.S. Office of Management and Budget (www.whitehouse.gov/omb/fedreg/metroareas122700.pdf). The size of the circle is proportional to the number of retail clinics in the CSA or MSA. The 30 CSAs or MSAs with the largest number of clinics are labeled. The circle is mapped to the geographic centroid of the CSA or MSA (for example, Los Angeles is not directly on the coast). The CSAs and MSAs frequently include more than 1 city (for example, San Jose, San Francisco, and Oakland, California, are in 1 CSA). For greater legibility of the map, we list only the largest city in the CSA or MSA (for example, San Jose) as the label. Clinics not located in a CSA or MSA (rural clinics) are shown as a small dot at their actual locations.

Table 1. Companies That Operate Retail Clinics and Clinic Locations*

Operator	Clinics, n	Location of Clinics	States
AeroClinic†	2	Airports in Atlanta and Philadelphia	Georgia, Pennsylvania
Alegent Quick Care	6	Hy-Vee, Pamida	Nebraska
ALMC Express Care	1	Hy-Vee	Minnesota
Aurora QuickCare‡	19	Wal-Mart, Piggly Wiggly, Aurora Pharmacy	Wisconsin
Bellin Health FastCare	5	Shopko, Dreier	Wisconsin
CMC-Express	1	Harris Teeter	North Carolina
Curaquick	5	Hy-Vee	Iowa, Nebraska, South Dakota
DR Walk-In Medical Care	2	Duane Reade	New York
ExpressAid	2	Wal-Mart	Florida
ExpressCare†	1	Standalone	Florida
ExpressHealth	3	Jeffco, Crescent	Tennessee
Fairview Express Care	4	Coborn's	Minnesota
Family Quick Care‡	3	Meijer	Illinois
Geisinger Careworks Convenient Healthcare	5	Weis Markets, Kings Super Market, Mr. Z's Food Mart	Pennsylvania
Gundersen Lutheran ExpressCare‡	3	Degen Berglund	Wisconsin
HealthPartners HealthStation	2	Coborn's, Cashwise	Minnesota
HealthRite	2	ShopRite	New Jersey
Intermountain ExpressCare	5	Smith's	Utah
Lindora Health Clinics	9	Rite Aid	California
Mayo Express Care†‡	1	Standalone	Minnesota
MedAisle Express Care	1	Sak 'N Save	Nevada
MediMin§	4	Food City, Bashas', Ike's Farmers' Market	Arizona
MedPoint Express‡	4	Wal-Mart	Indiana
Mercy Quick Care Clinic	4	Dahl's Food Store	Iowa
MinuteClinic‡	514	CVS, Cub Foods, QFC	Arizona, California, Connecticut, Florida, Georgia, Illinois, Indiana, Kansas, Maryland, Michigan, Minnesota, Montana, North Carolina, New Jersey, Nevada, New York, Ohio, Oklahoma, Oregon, Pennsylvania, Tennessee, Texas, Virginia, Washington
NOW Express Care‡	16	Cub Foods, Shop 'N Save	Minnesota, Missouri
OMC FastCare	2	Shopko	Minnesota
Premier ExpressCare	2	Kroger	Ohio
QuickClinic‡	6	Acme Fresh, Pharm Store, Buehler's, Ritzman's Pharmacies	Ohio
QuickHealth‡	16	Wal-Mart, Long Drugs, Farmacias Remedios	California
RediCARE	1	Express Care Pharmacy	Florida
RediClinic	36	Wal-Mart, HEB	Arkansas, Georgia, Oklahoma, Texas, Virginia
Roadside Medical Clinic	3	Pilot Travel Center	Arkansas, Georgia, Tennessee
Saint Alphonsus Express Care	5	Rite Aid, Albertsons	Idaho
Solantic‡	16	Wal-Mart, Food Lion	Florida
St. James Mercy Express Care Center†	1	Standalone	New York
St. Luke's Q Care	1	Cub Foods	Minnesota
Sutter Express	6	Rite Aid	California
Take Care Clinics	176	Walgreens	Arizona, Colorado, Florida, Georgia, Illinois, Kansas, Kentucky, Missouri, Nevada, Ohio, Pennsylvania, Tennessee, Texas, Wisconsin
Target Clinic	24	Target	Minnesota, Maryland
The Little Clinic	60	Fry's, Kroger, Publix	Arizona, Florida, Georgia, Kentucky, Michigan, Ohio, Tennessee
ValuClinic§	3	Navarro Discount Pharmacies	Florida
Total	982		

* As of August 2008.

† Operator only has standalone locations.

‡ Operator also has standalone clinics. These clinics are located most commonly in a retail setting, such as a shopping plaza or mall.

§ Operator has closed.

located in just 5 states. One third of the U.S. urban population lived within a 10-minute driving distance of a retail clinic. Almost all clinics provided care for minor acute illnesses and immunizations, as well as preventive health examinations or screening. Some clinics also provided smoking cessation or weight loss counseling. Nearly all retail clinics offered evening and weekend hours. Most clinics accepted private insurance and Medicare, and more than

half also accepted some form of Medicaid. Although most retail clinic operators were hospital chains or physician groups, they ran only 11% of the clinics.

To our knowledge, our study is the first systematic description of the industry in the published literature. Of the 49 articles that have been published on the retail clinic industry (on the basis of an English-language MEDLINE search from January 2000 through May 2009 by using the

search terms *retail clinic*, *retail health clinic*, *retail-based clinic*, and *in-store clinic*, only 6 (4, 5, 21–24) are empirical studies. These 6 studies focus on quality of care provided, effect of retail clinics on use or costs, or who visits retail clinics and for what reason.

Although previously published articles (2, 3, 25, 26) describe retail clinics as a nascent health care delivery model, retail clinics are now operating in 33 states. Further, in some cities more than 90% of the population live within close driving distance of a clinic. It is possible that state regulations, such as nurse practitioner scope-of-practice laws or retail clinic licensing regulations, are the cause of the state variation in number of clinics (2, 5, 27).

Table 2. Proportion of State Population Within a 5- or 10-Minute Drive to a Retail Clinic*

State	Population, million n	Clinics, n	Population in Clinic Catchment Area, million n (%)	
			Within 5 Minutes	Within 10 Minutes
Arizona	5.13	35	0.95 (18.6)	2.52 (49.1)
Arkansas	2.67	3	0.03 (1.3)	0.14 (5.3)
California	33.87	89	5.69 (16.8)	15.65 (46.2)
Colorado	4.30	3	0.15 (3.4)	0.58 (13.4)
Connecticut	3.41	13	0.34 (10.0)	1.04 (30.4)
District of Columbia†	0.57	0	0.06 (10.6)	0.52 (90.3)
Florida	15.98	134	3.74 (23.4)	8.10 (50.7)
Georgia	8.19	61	0.90 (11.0)	2.70 (33.0)
Idaho	1.29	5	0.12 (9.5)	0.27 (21.2)
Illinois	12.42	64	3.02 (24.3)	7.17 (57.7)
Indiana	6.08	16	0.33 (5.4)	1.11 (18.3)
Iowa	2.93	6	0.21 (7.2)	0.40 (13.7)
Kansas	2.69	11	0.26 (9.5)	0.53 (19.9)
Kentucky	4.04	7	0.22 (5.4)	0.75 (18.6)
Maryland	5.30	29	1.11 (20.9)	2.94 (55.6)
Massachusetts†	6.35	0	0.00 (0.0)	0.03 (0.4)
Michigan	9.94	18	0.42 (4.2)	1.80 (18.1)
Minnesota	4.92	70	1.38 (28.1)	2.68 (54.4)
Missouri	5.60	28	0.37 (6.6)	0.83 (14.8)
Nebraska	1.71	8	0.16 (9.6)	0.49 (28.5)
Nevada	2.00	17	0.68 (34.1)	1.42 (70.9)
New Jersey	8.41	28	0.76 (9.0)	3.16 (37.6)
New York	18.98	10	1.48 (7.8)	4.54 (23.9)
North Carolina	8.05	36	0.43 (5.3)	1.59 (19.7)
Ohio	11.35	45	1.33 (11.7)	3.67 (32.3)
Oklahoma	3.45	5	0.10 (3.0)	0.34 (9.9)
Oregon	3.42	1	0.01 (0.4)	0.17 (5.1)
Pennsylvania	12.28	40	1.25 (10.2)	3.78 (30.8)
South Carolina†	4.01	0	0.00 (0.0)	0.00 (0.1)
South Dakota	0.75	1	0.04 (5.8)	0.12 (16.0)
Tennessee	5.69	45	0.63 (11.0)	1.34 (23.5)
Texas	20.85	75	1.73 (8.3)	5.32 (25.5)
Utah	2.23	5	0.17 (7.7)	0.59 (26.2)
Virginia	7.08	30	0.63 (8.9)	1.73 (24.5)
Washington	5.89	7	0.30 (5.1)	0.72 (12.3)
Wisconsin	5.36	37	0.94 (17.6)	1.95 (36.4)
National	281.42	982	29.96 (10.6)	80.69 (28.6)

* Census data from 2000. Total population for national estimate includes all 50 states and Washington, DC. We did not include the 14 states where none of the population has access to a retail clinic.

† No clinics are located in the state, but a proportion of the population can access a clinic in another state.

A previous study (4) showed that most retail clinic visits were for minor acute illnesses and immunizations. Whether retail clinics will expand beyond this basic scope of care, particularly in the area of chronic disease management, is a topic of interest (2, 3, 25, 28). We found no expansion into chronic disease management and only limited expansion into counseling services as of August 2008.

Physician associations have expressed concerns (7, 9–13) that the growth of retail clinics will adversely affect the coordination of care and patient–primary care provider relationships. The increasing number of hospital chains and physician groups that operate retail clinics might lessen these concerns, because primary care physicians and retail clinic providers could share a common electronic record at such clinics (21, 29, 30). In addition, new types of partnerships between existing providers and retail clinics have developed (30). Wal-Mart has partnered with local hospital chains to cobrand clinics in their stores (31), and Minute-Clinic and the Cleveland Clinic have recently announced a partnership to run 9 clinics together and to integrate their electronic medical records (32).

In the original model, retail clinics did not accept insurance (2, 17); however, a significant shift has occurred in practice. Now, almost all clinics accept private and Medicare insurance and most accept some form of Medicaid. Evidence that retail clinics are less costly might have driven greater acceptance by these payers (23). To encourage more retail clinic visits, at least 1 private insurer has waived the copayment for retail clinic visits (33).

Our analysis has limitations. On the basis of earlier retail market research, we used a 5-minute driving distance to define a retail clinic catchment area. However, patients may differ from other retail consumers in the distance they are willing to travel. We looked at the entire population in a catchment area, recognizing that this population is the possible, rather than the probable, clientele of the retail clinic. Because a given clinic may accept one Medicaid managed care plan but not others, we may have overestimated the number of clinics where a Medicaid enrollee could receive care. The distinction between an urgent care clinic and retail clinics is sometimes blurred, and some might disagree with the inclusion of certain clinics in our sample; for example, DR Walk-In has 2 clinics staffed by a physician, but the clinics are located in a drugstore and have a limited scope of care. Finally, we created our inventory of clinics in the summer of 2008. Since then, new clinics have opened, some clinics have closed, and at least 2 operators have gone out of business. However, the overall rate of growth has slowed since that time (34), and we believe our findings are still representative of the industry.

Monitoring the location and characteristics of retail clinics over time may help providers and policymakers better understand their potential effect on health care.

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Appendix Table 1. Types of Stores in Which Retail Clinics Are Located

Operator	Clinics, n				Total
	Pharmacy	Grocery Store	Retail Store	Other	
MinuteClinic	496	11		7	514
Take Care Clinics	176				176
The Little Clinic		60			60
RediClinic		20	16		36
Target Clinic			24		24
Aurora QuickCare	5	2	7	5	19
Solantic		1	4	11	16
NOW Express Care		9		7	16
QuickHealth	11		4	1	16
Lindora Health Clinics	9				9
QuickClinic	2	3		1	6
Alegent Quick Care		5	1		6
Sutter Express	6				6
Bellin Health FastCare	1		4		5
Curaquick		5			5
Geisinger Careworks Convenient Healthcare		5			5
Intermountain ExpressCare		5			5
Saint Alphonsus Express Care	3	2			5
MedPoint Express			3	1	4
Mercy Quick Care Clinic		3		1	4
Fairview Express Care		4			4
MediMin		4			4
Gundersen Lutheran ExpressCare	1			2	3
Family Quick Care			1	2	3
ExpressHealth	3				3
Roadside Medical Clinic			3		3
ValuClinic	3				3
AeroClinic				2	2
HealthRite		2			2
DR Walk-In Medical Care	2				2
ExpressAid			2		2
HealthPartners HealthStation		2			2
OMC FastCare			2		2
Premier ExpressCare		2			2
ExpressCare				1	1
Mayo Express Care				1	1
St. James Mercy Express Care Center				1	1
ALMC Express Care		1			1
CMC-Express		1			1
MedAisle Express Care		1			1
RediCARE	1				1
St. Luke's Q Care		1			1
Total	719	149	71	43	982

Appendix Table 2. Retail Clinics in Urban Areas and Each Region of the United States

Operator	Clinics, n					
	Total	Urban	Region			
			Midwest	North	South	West
MinuteClinic	514	461	111	72	237	94
Take Care Clinics	176	156	77	8	72	19
The Little Clinic	60	54	13		44	3
RediClinic	36	29			36	
Target Clinic	24	19	19		5	
Aurora QuickCare	19	17	19			
NOW Express Care	16	12	16			
QuickHealth	16	14				16
Solantic	16	14			16	
Lindora Health Clinics	9	9				9
Alegent Quick Care	6	5	6			
QuickClinic	6	6	6			
Sutter Express	6	5				6
Bellin Health FastCare	5	4	5			
Curaclick	5	4	5			
Geisinger Careworks Convenient Healthcare	5	4		5		
Intermountain ExpressCare	5	5				5
Saint Alphonsus Express Care	5	5				5
Fairview ExpressCare	4	3	4			
MediMin	4	3				4
MedPoint Express	4	4	4			
Mercy Quick Care Clinic	4	3	4			
ExpressHealth	3	2			3	
Family Quick Care	3	2	3			
Gundersen Lutheran ExpressCare	3	3	3			
Roadside Medical Clinic	3	0			3	
ValuClinic	3	3			3	
AeroClinic	2	2		1	1	
DR Walk-In Medical Care	2	2		2		
ExpressAid	2	2			2	
HealthPartners HealthStation	2	2	2			
HealthRite	2	2		2		
OMC FastCare	2	2	2			
Premier ExpressCare	2	2	2			
ALMC Express Care	1	1	1			
CMC-Express	1	1			1	
ExpressCare	1	1			1	
Mayo Express Care	1	1	1			
MedAisle Express Care	1	1				1
St. James Mercy Express Care Center	1	1		1		
RediCARE	1	1			1	
St. Luke's Q Care	1	1	1			
Total	982	868	304	91	425	162

Appendix Table 3. Number of Retail Clinics and Operators in Each State

State	Clinics, n	Operators (Number of Clinics)
Arizona	35	MinuteClinic (20), Take Care Clinics (8), MediMin (4), The Little Clinic (3)
Arkansas	3	RediClinic (2), Roadside Medical Clinic (1)
California	89	MinuteClinic (58), QuickHealth (16), Lindora Health Clinics (9), Sutter Express (6)
Colorado	3	Take Care Clinics (3)
Connecticut	13	MinuteClinic (13)
Florida	134	MinuteClinic (53), Take Care Clinics (32), The Little Clinic (26), Solantic (16), ValueClinic (3), ExpressAid (2), ExpressCare (1), RediCARE (1)
Georgia	61	MinuteClinic (31), Take Care Clinics (16), The Little Clinic (9), RediClinic (3), Roadside Medical Clinic (1), AeroClinic (1)
Idaho	5	Saint Alphonsus Express Care (5)
Illinois	64	Take Care Clinics (33), MinuteClinic (28), Family Quick Care (3)
Indiana	16	MinuteClinic (12), MedPoint Express (4)
Iowa	6	Curaquick (2), Mercy Quick Care Clinic (4)
Kansas	11	MinuteClinic (7), Take Care Clinics (4)
Kentucky	7	The Little Clinic (5), Take Care Clinics (2)
Maryland	29	MinuteClinic (24), Target (5)
Michigan	18	MinuteClinic (16), The Little Clinic (2)
Minnesota	70	MinuteClinic (25), Target (19), NOW ExpressCare (15), Fairview Express Care (4), HealthPartners HealthStation (2), ALMC Express Care (1), Mayo Express Care (1), OMC FastCare (2), St. Luke's Q Care (1)
Missouri	28	Take Care Clinics (19), MinuteClinic (8), NOW ExpressCare (1)
Nebraska	8	Alegent Quick Care (6), Curaquick (2)
Nevada	17	MinuteClinic (8), Take Care Clinics (8), MedAisle Express Care (1)
New Jersey	28	MinuteClinic (26), HealthRite (2)
New York	10	MinuteClinic (7), DR Walk-In Medical Care (2), St. James Mercy Express Care Center (1)
North Carolina	36	MinuteClinic (35), CMC-Express (1)
Ohio	45	MinuteClinic (15), Take Care Clinics (11), The Little Clinic (11), QuickClinic (6), Premier ExpressCare (2)
Oklahoma	5	Minute Clinic (3), RediClinic (2)
Oregon	1	Minute Clinic (1)
Pennsylvania	40	MinuteClinic (26), Take Care Clinics (8), Geisenger Careworks Convenient Healthcare (5), AeroClinic (1)
South Dakota	1	Curaquick (1)
Tennessee	45	MinuteClinic (25), Take Care Clinics (12), The Little Clinic (4), ExpressHealth (3), Roadside Medical Clinic (1)
Texas	75	MinuteClinic (45), RediClinic (20), Take Care Clinics (10)
Utah	5	Intermountain ExpressCare (5)
Virginia	30	MinuteClinic (21), RediClinic (9)
Washington	7	MinuteClinic (7)
Wisconsin	37	Aurora QuickCare (19), Take Care Clinics (10), Bellin Health FastCare (5), Gundersen Lutheran ExpressCare (3)
Total	982	

Appendix Table 4. Operators and Number of Clinics

Operator	Clinics, <i>n</i>
Physician group or hospital chain (<i>n</i> = 113)	
Alegent Quickcare	6
ALMC Express Care	1
Aurora QuickCare	19
Bellin Health FastCare	5
CMC-Express	1
ExpressAid	2
ExpressCare	1
Fairview Express Care	4
Family Quick Care	3
Geisinger Careworks Convenient Healthcare	5
Gundersen Lutheran ExpressCare	3
HealthPartners HealthStation	2
HealthRite	2
Intermountain ExpressCare	5
Lindora Health Clinics	9
Mayo Express Care	1
MedPoint Express	4
Mercy Express Care Center	1
Mercy Quick Care Clinic	4
OMC FastCare	2
Premier ExpressCare	2
Saint Alphonsus Express Care	5
Solantic	16
St. Luke's Q Care	1
Sutter Express	6
ValuClinic	3
Owner of stores in which clinics are located (<i>n</i> = 714)	
MinuteClinic	514
Take Care Clinics	176
Target Clinic	24
Partner with a retail store or only has standalone locations (<i>n</i> = 155)	
AeroClinic	2
Curaquick Clinic	5
DR Walk-In Medical Care	2
ExpressHealth	3
MedAisle Express Care	1
MediMin	4
NOW Express Care	16
QuickClinic	6
QuickHealth	16
RediCARE	1
RediClinic	36
Roadside Medical Clinic	3
The Little Clinic	60
Total	982

Appendix Table 5. Proportion of the Population That Lives Close to a Retail Clinic in the 50 Largest Urban Areas

Urban Area	Total Population, thousand <i>n</i>	Population in Clinic Catchment Area, thousand <i>n</i> (%)	
		Within 5 Minutes	Within 10 Minutes
New York–Newark, New Jersey–Connecticut	16 859	1835 (10.9)	6315 (37.5)
Los Angeles–Long Beach–Santa Ana, California	11 654	3004 (25.8)	8669 (74.4)
Chicago, Illinois–Indiana	8081	2829 (35.0)	6523 (80.7)
Philadelphia, Pennsylvania–New Jersey–Delaware–Maryland	4908	842 (17.2)	2927 (59.6)
Miami, Florida	4662	2026 (43.5)	3967 (85.1)
Dallas–Fort Worth–Arlington, Texas	3983	566 (14.2)	1903 (47.8)
Detroit, Michigan	3813	400 (10.5)	1718 (45.0)
Boston, Massachusetts–New Hampshire–Rhode Island	3689	0 (0.0)	0 (0.0)
Houston, Texas	3623	596 (16.5)	1889 (52.2)
Washington, DC–Virginia–Maryland	3563	1057 (29.7)	3072 (86.2)
Atlanta, Georgia	3086	834 (27.0)	2453 (79.5)
San Francisco–Oakland, California	2916	777 (26.6)	1859 (63.8)
Phoenix–Mesa, Arizona	2814	590 (21.0)	1727 (61.4)
Seattle, Washington	2548	282 (11.1)	683 (26.8)
San Diego, California	2480	724 (29.2)	1930 (77.8)
Minneapolis–St. Paul, Minnesota	2270	1155 (50.9)	2178 (96.0)
Baltimore, Maryland	1937	578 (29.9)	1438 (74.2)
Denver–Aurora, Colorado	1927	144 (7.5)	563 (29.2)
Tampa–St. Petersburg, Florida	1863	717 (38.5)	1,626 (87.3)
Cleveland, Ohio	1678	186 (11.1)	759 (45.3)
Pittsburgh, Pennsylvania	1586	514 (32.4)	1059 (66.8)
Portland, Oregon–Washington	1510	12 (0.8)	174 (11.5)
San Jose, California	1509	275 (18.3)	740 (49.0)
Riverside–San Bernardino, California	1423	73 (5.1)	266 (18.7)
Cincinnati, Ohio–Kentucky–Indiana	1363	231 (16.9)	753 (55.3)
Sacramento, California	1329	227 (17.1)	831 (62.5)
Kansas City, Missouri–Kansas	1286	556 (43.2)	1162 (90.3)
Las Vegas, Nevada	1272	623 (48.9)	1191 (93.6)
San Antonio, Texas	1261	0 (0.0)	0 (0.0)
Milwaukee, Wisconsin	1236	544 (44.1)	1103 (89.3)
Indianapolis, Indiana	1115	228 (20.5)	759 (68.1)
Orlando, Florida	1091	434 (39.8)	956 (87.7)
Columbus, Ohio	1062	419 (39.4)	978 (92.1)
Providence, Rhode Island–Massachusetts	1049	0 (0.0)	0 (0.0)
New Orleans, Louisiana	968	0 (0.0)	0 (0.0)
Buffalo, New York	928	0 (0.0)	0 (0.0)
Memphis, Tennessee–Mississippi–Arkansas	912	13 (1.4)	81 (8.8)
Salt Lake City, Utah	863	123 (14.3)	462 (53.6)
Austin, Texas	821	318 (38.7)	747 (91.0)
Bridgeport–Stamford, Connecticut–New York	820	114 (13.9)	296 (36.1)
Louisville, Kentucky–Indiana	804	106 (13.2)	354 (44.1)
Hartford, Connecticut	786	121 (15.4)	369 (46.9)
Jacksonville, Florida	772	274 (35.5)	635 (82.3)
Virginia Beach, Virginia	715	0 (0.0)	0 (0.0)
Oklahoma City, Oklahoma	703	57 (8.1)	168 (23.9)
Tucson, Arizona	674	320 (47.4)	629 (93.3)
Dayton, Ohio	648	65 (10.0)	202 (31.2)
Rochester, New York	639	0 (0.0)	0 (0.0)
Nashville–Davidson, Tennessee	639	362 (56.7)	598 (93.7)
Charlotte, North Carolina–South Carolina	636	143 (22.5)	523 (82.3)
El Paso, Texas–New Mexico	619	0 (0.0)	0 (0.0)