What hospital leaders should know about urgent care centers

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by Andrea J. Simon

I have been working with a hospital's urgent care centers to address the emerging issue of how to create experiences that are differentiating and of value to their customers. Not patients--customers.

Already, there are 26 urgent care centers in the urban-suburban area this hospital serves, with lots more coming soon. Talk about competition!

With urgent care centers popping up everywhere, safeguarding the "brand" is more important than ever, but all too often overlooked.

As an anthropologist, I always love to watch change coming, first as a dribble and then as a roaring tidal wave. As we were researching the state of the urgent care center from a customer experience perspective, interestingly there was nothing much to find. However, we found some other things that were well worth sharing with our *Hospital Impact* audience.

[More:]

First, how many new urgent care centers are there?

How many opened last year or are projected for this year? Don't know! No one is counting, or at least sharing the count. As Dan Goldberg writes in his October 2014 article in *Capital* on New York's urgent care market: "It's hard to say precisely how many clinics there are in New York at the moment because no one, officially, is counting." Indeed, thanks to aggressive and effective lobbying efforts, there is very little regulation of the urgent care industry and its centers in New York. The result? They are treated more like physicians' offices, with no regulations guiding or managing their operations.

Second, what is this really about?

Is it to reduce the number of people going to emergency departments (EDs) for care when their doctors are too busy or not available? Research suggests that 75 percent of ED visits are simply "urgent" in nature--not real emergencies.

Or is it about getting a fast and easy solution that is more convenient for the consumer and of equal or perhaps better quality than that provided by the primary care physician (PCP)? Whether it is the $39 sports physical being advertised by CVS or a $175 fee for a sinus infection, the consumer with a large deductible is now choosing affordable (if not lower cost or free) options with acceptable wait times in convenient locations. No wonder there's so much competition.

Or, maybe it is about both. As Deloitte research from 2014 showed, people have choices, which means they are now searching, researching and choosing what they feel is best for their individual situation.

As the downloadable infographic, at left, from Deloitte illustrates, there is a confluence of forces coming together with the urgent care solution as an important option. From a public health perspective, however, this is very disruptive to the long-standing and highly advocated position that people need a PCP to manage their care over their lifetimes.

Urgent care center administrators contend that they are not targeting those with diabetes or chronic asthma. Rather, they are hoping to capture the bumps and bruises, the sprains and sports injuries, by offering right-in-your-neighborhood, right-when-you-need-it care.

Indisputably, then, urgent care centers are not a short-term solution--they are a long-term cultural transformation. As Greg Burke, United Hospital Fund director of innovation strategies, stated in Goldberg's article: "This is potentially enormously disruptive to the primary care model and the historical ways of seeking care. If you are talking about the core of health reform being really robust primary care ... this is not necessarily supportive of that. This isn't a medical home. It's a medical motel. You check in and check out."

Third, who is leading the push?

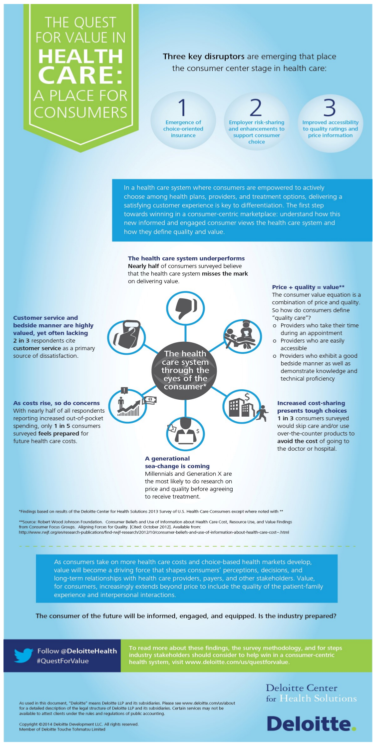
Everyone, it seems: healthcare systems, independent hospitals, private companies, pediatricians and physicians with multi-specialty practices. As a July 9, 2014 article in the *New York Times* reported, the old "Doc in a Box ... has mushroomed into an estimated $14.5 billion business, as investors try to profit from the shifting landscape in healthcare." Right or wrong? Only time will tell.

And don't overlook Walgreens, the nation's largest drugstore chain, as it attempts to alter the entire healthcare landscape with its branded "Well Experience." Its "Take Care Clinics" offer a wide range of healthcare services including vaccinations, health tests, physicals and treatments for common illnesses and minor injuries. Its pharmacists even carry tablets that store customers' medical history, allowing them to meaningfully contribute to the long-term care of their patrons. As company President Joe Mangacca states, Walgreens' aim is to "transform from a traditional drugstore to a retail health and daily living destination," out of the desire to become "a central part of life for many who live and work" in and around their stores.

And if I may, yet one more piece of evidence illustrating this transformational trend: the successful Firefly After Hours Pediatric Urgent Care founded by pediatricians in Stamford, Connecticut, whose extended hours (11 p.m. Monday-Thursday and 9 p.m. Friday, Saturday and Sunday) bring joy and relief to working parents.

Is this a good, great or just another change happening in healthcare?

We're not sure yet. Our urgent care center research has revealed both glowing reviews and scathing criticism ("where you go for two Tylenol until you can see your PCP on Monday"). Stay tuned. More to come.



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