

# The Search for the Urgent Care Center

**Urgent message:** Efforts to define and accurately count urgent care centers in the U.S.—which may be crucial to the industry’s continued growth—are ongoing, and will require the commitment of trade organizations and individual urgent care owners alike.

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Our quest to provide accurate, scientifically rigorous benchmarking data for urgent care centers began with the decision to conduct a survey. Before you can administer a survey, though, you need to be able to identify the individuals or organizations that you want to answer your questions.

### Defining Urgent Care

The first challenge was deciding what counts as an urgent care center. For example, consider three types of practices that one of us visited early in 2008:

- Dr. A has a family practice and sees scheduled patients, primarily. She provides the usual scope of primary care services. Located in a strip mall, her practice has a sign in the window that reads “walk-ins welcome.”
- Dr. B runs a storefront clinic. He sees walk-in



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patients, primarily, although they do take some appointments. He does not accept insurance, and charges \$25 cash for a visit. He performs few procedures in his office.

■ Dr. C describes his practice as half family medicine, half urgent care. They do suturing, splinting, and casting on site, and have a dedicated room for x-rays and film storage. They’re open every evening, as well as every Saturday, and they have a significant occupational medicine practice.

It’s probably safe to say that Drs. A and B are not running urgent care cen-

ters, but Dr. C is.

To move beyond the “I know one when I see one” approach, however, we needed a formal definition of what would count and what would not.

Working with the UCAOA Benchmarking Committee and basing our definition on previous work,<sup>1</sup> we de-

cided that to be counted as an urgent care center, a practice would need to meet *all* of the following criteria:

- Provides care primarily on a walk-in basis.
- Has evening office hours Monday through Friday.
- Has office hours at least one day over the weekend.
- Provides suturing for minor lacerations.
- Provides x-rays on site.

**Table 1. Search Engines and Key Phrases**

www.yellowpages.com	www.superpages.com	www.switchboard.com
Urgent care	Urgent care centers	Urgent care centers
Urgent care centers	Drop-in clinic	
Emergent care	Urgent care centers	
Walk-in clinic		

### Finding Urgent Care Centers

The next step was to locate as many urgent care centers as we could. This involved a three-part strategy: using health insurers' websites, Internet searches, and the UCAOA/JUCM mailing list.

#### Health insurers' websites

We developed a list of major insurance carriers by reviewing the government-operated website of the insurance commissioner for each state, as well as websites sponsored by trade associations of insurers, and those designed to help consumers in finding health insurance coverage. Any carrier that provided insurance solely for anything other than health coverage, such as life insurance, was removed from the list.

Then we searched each insurance carrier's website separately, using any available documents that listed their contracted urgent care centers. In addition, we searched the provider directory on each website to identify urgent care centers—if any—based on physician and center specialty.

#### Internet searches

We also searched Internet directories, using Rhode Island and the Los Angeles metropolitan area as trial locations to determine the best search terms based on advice from UCAOA staff and the UCAOA Benchmarking Committee (**Table 1**).

When we identified chains of urgent care centers, we went to each chain's website to ensure that we included all of its locations.

In general, the Internet directory searches yielded comparatively few urgent care centers that had not already been identified via the health insurer website search. For example, in North Carolina, the insurance carrier search yielded 267 urgent care centers, and the

Internet directory search netted an additional 70 urgent care centers.

#### UCAOA/JUCM mailing list

Finally, we used the UCAOA/JUCM mailing list, stripped of all retail clinics based on the names of known retail clinic chains, as well as any organizations listed as being inside a Walmart, Rite Aid, CVS, or Walgreens.

### What We Found

We found about 8,000 urgent care centers—far fewer than previous estimates of 12,000-20,000.

So, then, why the difference? We know that our count does not necessarily represent a complete and accurate count of all facilities in the U.S. for three reasons:

- First, there may be urgent care centers that we could not find using our search strategy.
- Second, it's likely that we're systematically missing urgent care centers that are part of hospitals. We tried to identify these centers by purchasing data from the American Hospital Association's annual survey, which asks the hospital executive completing the survey if that hospital has an urgent care center. (The definition offered on the back of their survey notes that an urgent care center is "A facility that provides care and treatment for problems that are not life threatening but require attention in the short-term.")

When we tried to find mailing addresses for these centers, however, many of them turned out to be the fast-track or minor-care area of the hospitals' emergency departments. Many hospitals operate walk-in clinics or urgent care centers, but this list left us with no way to locate them.

- Third, we know that many of the centers we

**Table 2. Ownership and Time in Operation**

	% or mean	Standard error
<i>Ownership (n=400)</i>		
Owned by a corporation as part of a chain or network	17.5	1.9
Independently owned by one physician	21.8	2.1
Independently owned by two or more physicians	32.3	2.3
Hospital-physician joint venture	3.8	1.0
Hospital-owned on campus	2.8	0.8
Hospital-owned off campus	22.0	2.1
<i>How long this center has been in operation (n=424)</i>		
<1 year	6.0	1.1
≥1 year but <2 years	9.2	1.4
≥2 years but <5 years	18.2	1.9
≥5 years	66.6	2.3

identified during our search would not meet our criteria. As a result, we excluded a variety of organizations, such as student health centers on college campuses, consulting and practice management firms, a surprising number of urgent lawn care businesses (in case those dandelions constitute an emergency!), a Volkswagen car dealership, and a veterinary center.

### The Survey

And then, we conducted our anonymous survey.

Of the 1,703 surveys that we mailed out, ultimately 595 respondents did not meet our definition of an urgent care center. That's more than one-third, even after carefully checking over our lists before sending out the surveys. Another 415 turned out to be wrong addresses, wrong phone numbers, or were otherwise unreachable.

What types of urgent care centers did answer our survey? As **Table 2** shows, they are primarily physician-owned organizations, although corporations own a significant proportion of these centers. Not surprisingly, given what we learned from the hospital list we purchased, we found very few centers owned by hospitals and operated on their campuses.

The organizations that responded to our survey had been in business for a while; approximately two-thirds had been in operation for five or more years. This probably is not representative of the field as a whole, however, since more established (i.e., "older")

organizations may be more likely to have staff with time available to answer survey questions.

### What We Learned

People ask us how many urgent care centers there are in the U.S.; however, there is no way to provide an exact answer to that question. The number we found (8,113, to be exact) reflects both significant undercounting and a lot of anonymous organizations that aren't really urgent care centers.

Realizing that this question is partly unanswerable, at present, provides valuable insight into the industry and could be a call to action, however.

Consider this: If a team of research professionals finds it difficult to identify every urgent care center in the country, how many patients that might be coming to you for care simply don't know you exist?

Anything you can do to promote awareness of your practice will contribute to establishing systematic ways of locating urgent care centers. And that will be good business for the entire marketplace.

*[Editor's note: Future issues of JUCM will look at the challenge of getting your urgent care center noticed and strategies that have proven effective for your colleagues.]*

### Reference

1. Weinick RM, Betancourt RM. No appointment needed: The resurgence of urgent care centers in the United States. 2007. California HealthCare Foundation. Available at: [www.chcf.org/documents/policy/NoAppointmentNecessaryUrgentCareCenters.pdf](http://www.chcf.org/documents/policy/NoAppointmentNecessaryUrgentCareCenters.pdf).