2014 ACEP URGENT CARE POLL RESULTS

PREPARED FOR:

American College of Emergency Physicians®
ADVANCING EMERGENCY CARE

PREPARED BY:

MARKETING GENERAL INCORPORATED®
WE GROW MEMBERSHIP™

625 North Washington Street, Suite 450
Alexandria, VA  22314
800.644.6646 toll free
703.739.1000 telephone
703.549.6057 fax
www.MarketingGeneral.com
Table of Contents

Study Background ........................................................................................................................................... 2
Sample Characteristics ..................................................................................................................................... 3
Findings............................................................................................................................................................ 8
Study Background

This survey is designed to capture a snapshot of the current trends in emergency medicine. Invitations to participate were sent on September 1, 2014, to a list of 26,900 current ACEP members.

Of the 26,900 email invitations sent, 1,382 emails bounced, resulting in a net total of 25,518 sent invitations. To boost response rates, a reminder email was sent to non-responders and non-completers on September 4th. A final reminder email was sent the morning the survey closed on September 8th.

The survey officially closed on September 8th at 11:59 p.m. EDT. Those respondents who indicated they only worked at an urgent care center were terminated from the study, as they were unable to answer the majority of the questions that asked about emergency departments. Therefore, a total of 2,853 surveys were completed, providing a response rate of approximately 11% and a margin of error of 1.8%. The margin of error, or standard error, is a statistical term used to measure the random fluctuations inherent in samples; the smaller the standard of error, the more accurate the measurement of the population or universe.

This study’s significance level of .05 carries with it a 95 percent confidence interval. The confidence interval is established as the likelihood that the same results would be achieved in a similar study, meaning that if we were to conduct this study 100 times, the same results plus or minus the margin of error (1.8%) would occur 95 out of 100 times.
## Sample Characteristics

### Number of Responses per State

<table>
<thead>
<tr>
<th>STATE</th>
<th>COUNT</th>
<th>PERCENT</th>
<th>STATE</th>
<th>COUNT</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>33</td>
<td>1%</td>
<td>Missouri</td>
<td>54</td>
<td>2%</td>
</tr>
<tr>
<td>Alaska</td>
<td>11</td>
<td>--</td>
<td>Montana</td>
<td>8</td>
<td>--</td>
</tr>
<tr>
<td>APO AE</td>
<td>2</td>
<td>--</td>
<td>Nebraska</td>
<td>16</td>
<td>1%</td>
</tr>
<tr>
<td>Arizona</td>
<td>52</td>
<td>2%</td>
<td>Nevada</td>
<td>11</td>
<td>--</td>
</tr>
<tr>
<td>Arkansas</td>
<td>10</td>
<td>--</td>
<td>New Hampshire</td>
<td>23</td>
<td>1%</td>
</tr>
<tr>
<td>California</td>
<td>230</td>
<td>8%</td>
<td>New Jersey</td>
<td>74</td>
<td>3%</td>
</tr>
<tr>
<td>Colorado</td>
<td>66</td>
<td>2%</td>
<td>New Mexico</td>
<td>21</td>
<td>1%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>47</td>
<td>2%</td>
<td>New York</td>
<td>214</td>
<td>8%</td>
</tr>
<tr>
<td>Delaware</td>
<td>20</td>
<td>1%</td>
<td>North Carolina</td>
<td>89</td>
<td>3%</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>9</td>
<td>1%</td>
<td>North Dakota</td>
<td>3</td>
<td>--</td>
</tr>
<tr>
<td>Florida</td>
<td>123</td>
<td>4%</td>
<td>Ohio</td>
<td>123</td>
<td>4%</td>
</tr>
<tr>
<td>Georgia</td>
<td>73</td>
<td>3%</td>
<td>Oklahoma</td>
<td>25</td>
<td>1%</td>
</tr>
<tr>
<td>Guam</td>
<td>1</td>
<td>--</td>
<td>Oregon</td>
<td>56</td>
<td>2%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>10</td>
<td>--</td>
<td>Pennsylvania</td>
<td>177</td>
<td>6%</td>
</tr>
<tr>
<td>Idaho</td>
<td>12</td>
<td>--</td>
<td>Puerto Rico</td>
<td>5</td>
<td>--</td>
</tr>
<tr>
<td>Illinois</td>
<td>131</td>
<td>5%</td>
<td>Rhode Island</td>
<td>25</td>
<td>1%</td>
</tr>
<tr>
<td>Indiana</td>
<td>53</td>
<td>2%</td>
<td>South Carolina</td>
<td>43</td>
<td>2%</td>
</tr>
<tr>
<td>Iowa</td>
<td>21</td>
<td>1%</td>
<td>South Dakota</td>
<td>7</td>
<td>--</td>
</tr>
<tr>
<td>Kansas</td>
<td>17</td>
<td>1%</td>
<td>Tennessee</td>
<td>30</td>
<td>1%</td>
</tr>
<tr>
<td>Kentucky</td>
<td>31</td>
<td>1%</td>
<td>Texas</td>
<td>205</td>
<td>7%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>33</td>
<td>1%</td>
<td>Utah</td>
<td>29</td>
<td>1%</td>
</tr>
<tr>
<td>Maine</td>
<td>19</td>
<td>1%</td>
<td>Vermont</td>
<td>8</td>
<td>--</td>
</tr>
<tr>
<td>Maryland</td>
<td>67</td>
<td>2%</td>
<td>Virginia</td>
<td>89</td>
<td>3%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>71</td>
<td>3%</td>
<td>Washington</td>
<td>90</td>
<td>3%</td>
</tr>
<tr>
<td>Michigan</td>
<td>136</td>
<td>5%</td>
<td>West Virginia</td>
<td>9</td>
<td>--</td>
</tr>
<tr>
<td>Minnesota</td>
<td>60</td>
<td>2%</td>
<td>Wisconsin</td>
<td>60</td>
<td>2%</td>
</tr>
<tr>
<td>Mississippi</td>
<td>17</td>
<td>1%</td>
<td>Wyoming</td>
<td>4</td>
<td>--</td>
</tr>
</tbody>
</table>
### Top 11 Participating States

<table>
<thead>
<tr>
<th>STATE</th>
<th>COUNT</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. California</td>
<td>230</td>
<td>8%</td>
</tr>
<tr>
<td>2. New York</td>
<td>214</td>
<td>8%</td>
</tr>
<tr>
<td>3. Texas</td>
<td>205</td>
<td>7%</td>
</tr>
<tr>
<td>4. Pennsylvania</td>
<td>177</td>
<td>6%</td>
</tr>
<tr>
<td>5. Michigan</td>
<td>136</td>
<td>5%</td>
</tr>
<tr>
<td>6. Illinois</td>
<td>131</td>
<td>5%</td>
</tr>
<tr>
<td>7. Florida</td>
<td>123</td>
<td>4%</td>
</tr>
<tr>
<td>8. Ohio</td>
<td>123</td>
<td>4%</td>
</tr>
<tr>
<td>9. Washington</td>
<td>90</td>
<td>3%</td>
</tr>
<tr>
<td>10. North Carolina</td>
<td>89</td>
<td>3%</td>
</tr>
<tr>
<td>11. Virginia</td>
<td>89</td>
<td>3%</td>
</tr>
</tbody>
</table>
What is the emergency department patient volume where you work the majority of your time?

About 41% of respondents work in emergency departments with up to 50,000 patients. 44% of respondents work in facilities with a patient volume between 50,001 and 100,000. The largest percentage of participants (25%) report working in an emergency department with a patient volume between 50,001 to 75,000.
Are you involved in any way (e.g., ownership, management, staff, etc.) with urgent care centers?

A large majority of respondents (82%) report that they are not involved in urgent care centers in any way.
In what type of geographic area is your emergency department located?

Nearly one half of participants (47%) indicate that they work in an urban emergency department.
Findings

**What percentage of patients in your emergency department are self-pay?**

- **Up to 10%**: 17%
- **11-25%**: 41%
- **26-50%**: 15%
- **51-75%**: 3%
- **More than 75%**: 1%
- **None**: 1%
- **Not sure**: 22%

41% of respondents report that approximately 11% to 25% of patients are self-pay.
What percentage of patients in your emergency department are Medicaid recipients?

- Up to 10%: 6%
- 11-25%: 34%
- 26-50%: 28%
- 51-75%: 6%
- More than 75%: 1%
- None: 1%
- Not sure: 24%

About one third of respondents (34%) indicate that between 11% and 25% of their patients receive Medicaid. Further, 28% report that 26%-50% of patients in their emergency department are Medicaid recipients.
In the past year, has at least one urgent care center or more operated within 10 miles of your emergency department?

86% of participants report that at least one urgent care center operates within 10 miles of their emergency department, with 76% indicating more than one in operation.
In the past year, has the number of visits to your emergency department been affected by an urgent care center operating within 10 miles of your emergency department?

Over one-third of respondents (37%) have noticed a change in the number of patients visiting the emergency department as a result of a local urgent care center. 21% have reported a decline in emergency visits while 16% have reported an increase in emergency visits. 39% of respondents indicate that over the last year there has been no change in the number of visits to their emergency department due to an urgent care center operating within 10 miles.
In your opinion, how is the growth in urgent care centers affecting the use of health care resources (such as physician visits, medical tests, procedures, etc.)?

40% of participants indicate that there has been an increase in the use of health care resources due to the growth in urgent care centers, while 22% report that there has been no change in the use of health care resources.
Has the growth of urgent care centers caused a change in the types of patients you see?

43% of respondents indicate that the growth of urgent care centers has not caused a change in the types of patients they see, while 29% report that they have seen only a little change in the types of patients seen.
How have your patients changed as a result of the growth in urgent care centers? Check all that apply.

- More complicated issues: 77%
- Less insured: 54%
- Lower income: 53%
- Older: 39%
- Younger: 4%
- Less complicated issues: 3%
- More insured: 2%
- Higher income: 1%
- Other: 6%

An overwhelming majority of respondents (77%) report that the main change due to the growth in urgent care centers is that they see patients with more complicated issues. 54% report their patients are less insured, and 53% say that their patients have a lower income.
Will urgent care centers pull more patients from emergency care or primary care?

Just over half of participants (51%) indicate that urgent care centers will pull patients from both emergency care and primary care, while nearly a quarter of respondents (22%) report that urgent care centers will pull more patients from primary care.
Are urgent care centers in your area marketing themselves as alternatives to the emergency department?

More than half the participants (54%) report that urgent care centers in their area are marketing themselves as alternatives to the emergency department. 21% indicate that only some of the urgent care centers are doing so.
Should urgent care centers be subject to EMTALA regulations?

Nearly half of respondents (49%) indicate that urgent care centers should be subject to EMTALA regulations, while 39% disagree.
A large majority of participants (72%) believe that states should have specific staffing or equipment criteria for urgent care centers. 18% of respondents, however, do not think states should have such criteria for urgent care centers.
How often are patients referred to your emergency department from an urgent care facility?

Over half the participants (54%) report that patients are referred to their emergency department from urgent care centers more than once a day. Only 1% of respondents indicate that patients are never referred to their emergency department from an urgent care center.
What are the primary reasons that patients are redirected to an emergency department from an urgent care facility? (Select top 2 reasons.)

- Medical condition was potentially more serious than patient thought: 90%
- Limited equipment and staffing compared to emergency department: 65%
- Did not have appropriate insurance or ability to pay at time of urgent care visit: 14%
- Could not get a timely appointment: 3%
- Other (please specify): 6%

A vast majority of participants (90%) report that patients were redirected to the emergency department because the medical condition was potentially more serious than the patient thought. Further, 65% indicate that the patient was redirected to the emergency department from the urgent care center because of the limited equipment and staffing at the urgent care center.
Of your patients who could have been safely treated at an urgent care center, why did they choose to go to the emergency room? (Select top 2 reasons.)

According to 44% of respondents, patients chose to go to the emergency department although they could have been safely treated at an urgent care center because of a lack of appropriate insurance or inability to pay the urgent care center. One third of participants (33%) also say that another primary reason is that the patient thought the emergency room was a better option.
Are urgent care centers in your area staffed by physicians on site?

44% of participants indicate that some of the urgent care centers in their area are staffed by physicians on site, but not all of them are. Moreover, 40% report that all the urgent care centers in their area are staffed by physicians on site.
Just over one third of participants (35%) indicate that the urgent care centers in their area do not have access to on-call specialists. However, 22% of respondents report that some urgent care centers do have access to such specialists, while 9% say the urgent care centers in their area do have access to on-call specialists.
Do urgent care centers in your area take Medicaid?

Only 14% of respondents indicate that urgent care centers in their area take Medicaid, while 21% say that some urgent care centers do, but not all of them. 19% of participants say that urgent care centers in their area do not take Medicaid.
Do urgent care centers in your area have a triage process?

Only 20% of respondents indicate that the urgent care centers in their area have a triage process. 13% of participants report that urgent care centers near them do not have a triage process. Only 4% say that triage is not needed at the urgent care centers in their area.
How many patients would you estimate your emergency department treated in the past year that first went to urgent care centers for life-threatening conditions (e.g., chest pain, stroke symptoms, difficulty breathing, etc.), instead of going directly to the emergency room?

About 30% of respondents report that over the past year their emergency department has treated up to 100 patients who originally went to urgent care centers for life-threatening conditions, and close to one-quarter (23%) indicate that 101 – 400 were patients who originally went to an urgent care center were treated in their emergency department for a life-threatening condition. 9% of respondents report their emergency department had more than 1,000 patients who originally went to an urgent care center for a life-threatening condition.
How concerned are you that patients with serious medical conditions may go to urgent care centers first before going to the emergency department?

A total of 76% of participants indicate that they have at least some concern about patients with serious medical conditions going to an urgent care center before going to the emergency department. Less than one quarter of participants (23%) say that they are not at all concerned.
Using a prudent layperson standard (i.e., people should seek emergency care based on their symptoms and not final diagnosis), what percentage of patients treated in your emergency department in the past year could have gone to an urgent care center instead?

Just less than one half of participants (45%) report that approximately 11% to 25% of patients treated in their emergency department in the past year could have gone to an urgent care center instead.
What percentage of patients can determine for themselves whether or not they require emergency care?

- Up to 10%: 18%
- 11-25%: 24%
- 26-50%: 24%
- 51-75%: 13%
- More than 75%: 8%
- No patients: 3%
- Not sure: 11%

n = 2,651

Nearly one quarter of participants (24%) indicate that between 11% and 25% of patients can determine for themselves whether they require emergency care. Moreover, 24% of respondents believe that between 26% and 50% of patients can determine for themselves if they need emergency care.