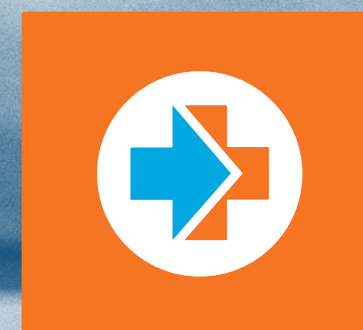


October 2019

Thriving in the Urgent Care Market The Leading Health System Perspective

TheAcademy



GoHealthTM
URGENT CARE

Table of Contents

3	Introduction
4	Study Participants
5	Key Findings
6	Overarching Strategy for Urgent Care
12	Implementation
19	Consumer Engagement
24	Future Outlook & Informed Practices
29	Methodology

Introduction

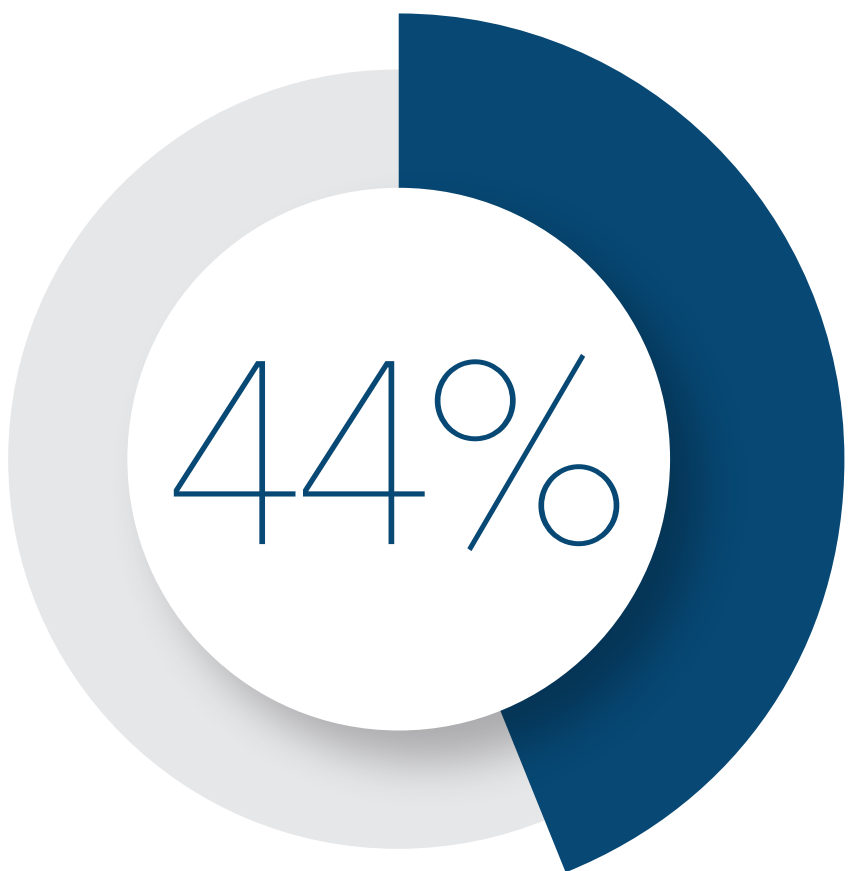
With consumerism at the forefront of healthcare transformation, provider organizations are becoming increasingly aware of the impact that patients' economic purchasing power has on their organizations. Often shaped by their interactions in retail settings across other industries, patients are taking a much more active role in purchasing and consuming the healthcare services they receive today. With mounting pressures to attract and retain consumers, coupled with the drive toward value-based care, health systems are seeking investment and partnership opportunities in alternative settings of care.

Urgent care clinics are meeting this growing demand for consumer-centric, efficient, and cost-effective care. Today, Leading Health Systems (LHS) are expanding their urgent care footprints and altering traditional models of care to capture new patient populations and meet consumer demands for more convenient, accessible care.

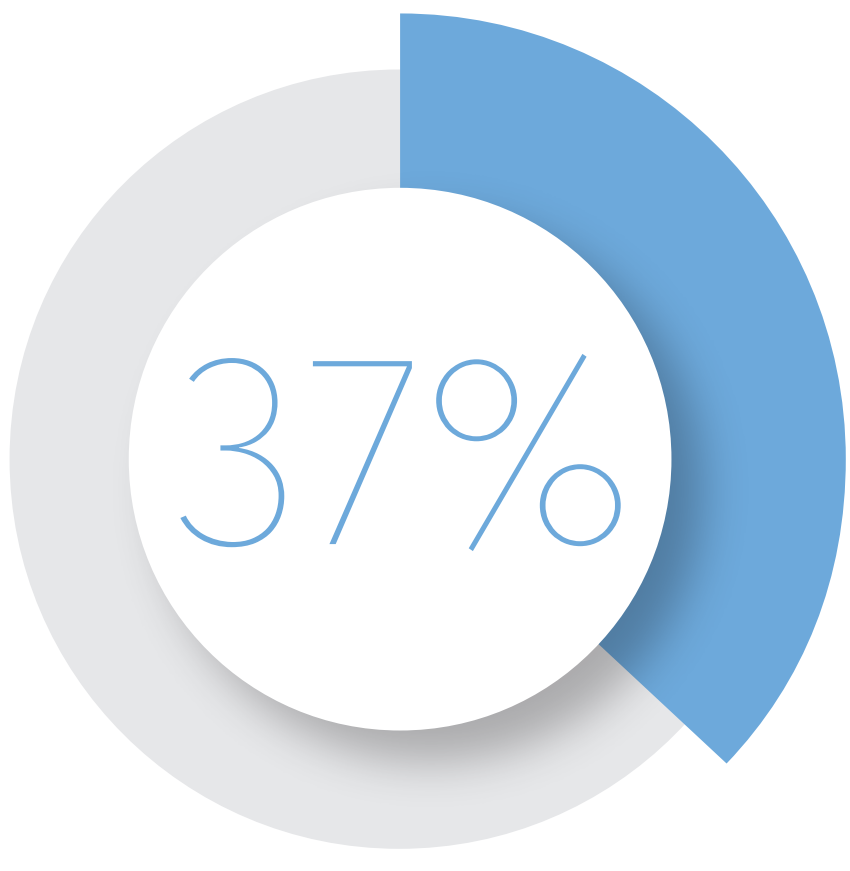
Despite the rapid growth in the urgent care market across LHS, the extent to which they are poised to be successful in this market long-term is unknown. The Health Management Academy (The Academy), with support from GoHealth Urgent Care - an independent partnership-focused urgent care organization - set out to better understand how LHS are pursuing innovation in the urgent care market, and the extent to which these health systems are prepared for long-term success in a more competitive, consumer-driven marketplace.

¹ Urgent Care Association, 2018 Benchmarking Report.

Leading Health System Urgent Care Footprint



Growth in Urgent Care Clinics from 2013 to 2018¹



of Urgent Care Clinics Owned by Hospitals and Health Systems¹

8

Average number of urgent care clinics for **small** health systems (those who operate less than \$2B Total Operating Revenue (TOR))

13

Average number of urgent care clinics for **medium** health systems (those who operate \$2-5B TOR)

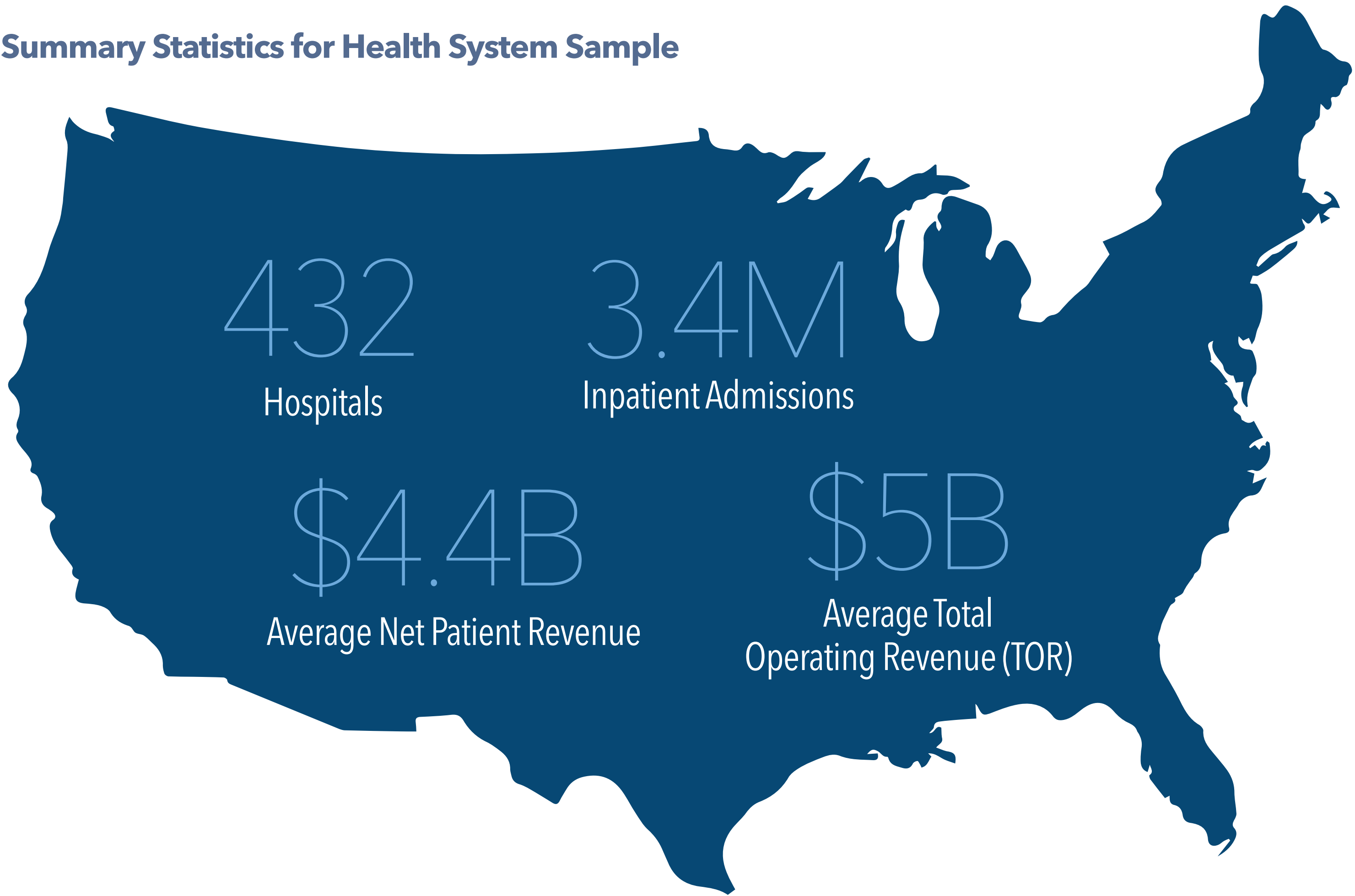
27

Average number of urgent care clinics for **large** health systems (those who operate greater than \$5B TOR)

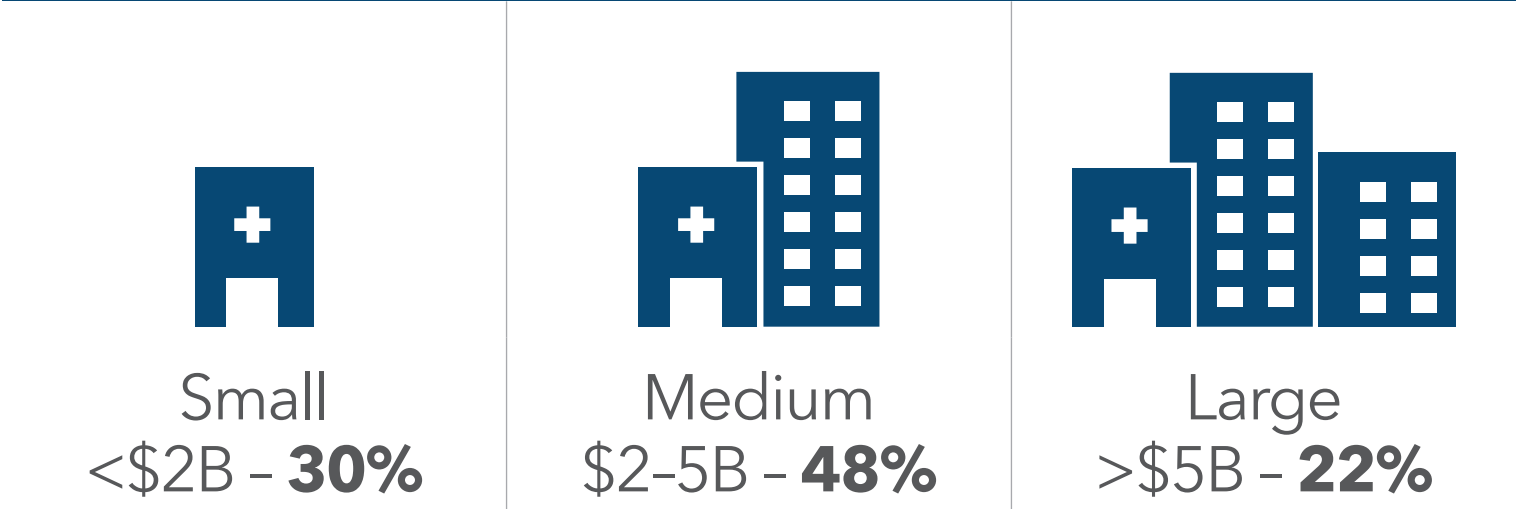
Perspectives Representative of the Leading Health System Market

The 25 Participating Health Systems Represent a Significant Share of the Market

Summary Statistics for Health System Sample



Health System Size (TOR)



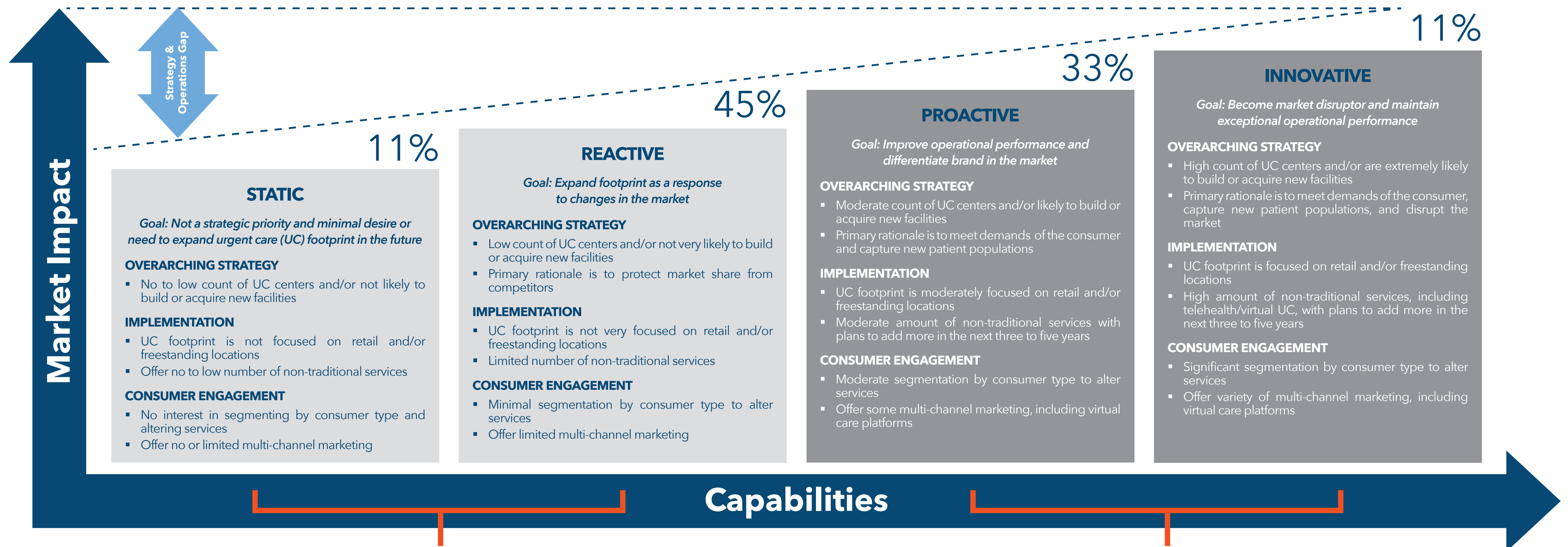
Participant Roles

Chief Financial Officer, Chief Innovation Officer, Chief Medical Officer, Chief Operating Officer, Chief Strategy Officer
Chief Hospital Officer
Vice President (VP)/Director of Consumer Strategy, VP/Director of Finance, VP/Director of Operations, VP of Programs and Ancillary, VP/Director of Strategy
Executive Vice President (EVP) of Business Development, Manager of Business Development
Senior Vice President (SVP) of Urgent Care

Key Findings

Leading Health Systems are Investing in Urgent Care, Yet Few Thrive

Only 11% of LHS urgent care strategies are shaped by market disruption and innovation



Note: Model adapted from the Tagoras Learning Business Model.

Health Systems that are **Surviving**

Health Systems that are **Thriving**

Overarching Strategy

Urgent care strategy and impetus for expansion

Health Systems More Likely to Invest in Urgent Care than Retail Pharmacy Clinics

Most Own or Operate Urgent Care Clinics

Nearly all health systems surveyed (93%) own or operate urgent care (UC) clinics, with an average of 14 urgent care facilities per system.

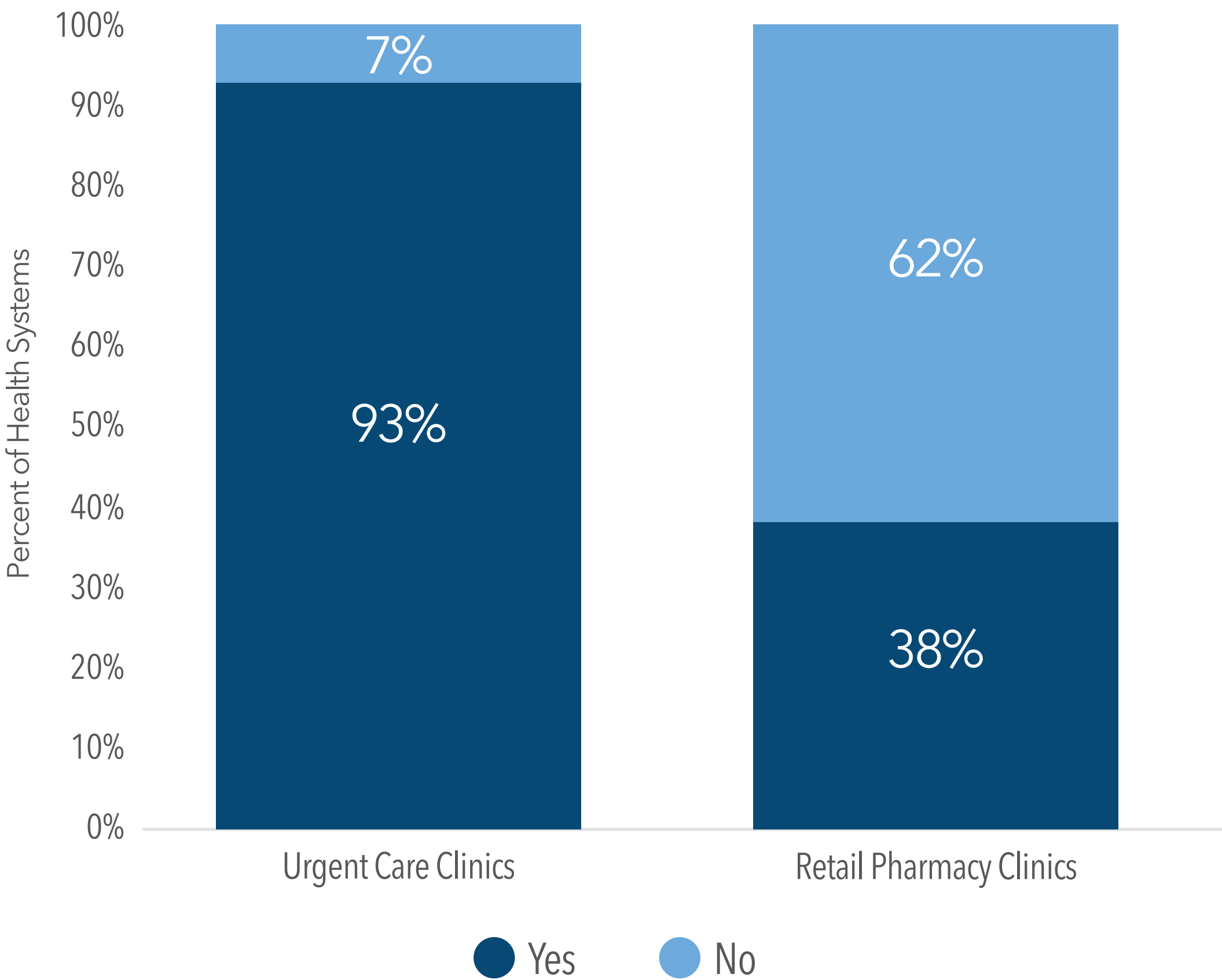
Small Health Systems	Average of 8 UC facilities & 115,643 annual visits
Medium Health Systems	Average of 13 UC facilities & 163,875 annual visits
Large Health Systems	Average of 27 UC facilities & 251,667 annual visits

Health Systems Find Less Value in Retail Pharmacy Clinics

Only 38% of health systems own or operate retail pharmacy clinics (e.g., MinuteClinics), with an average of three retail pharmacy clinics per system. Some health systems surveyed are hoping to own or operate retail clinics in the future, whereas others do not see the retail clinic as a sustainable model. Common challenges cited are high costs, low profitability, lower utilization relative to urgent care, less impact on downstream referrals across the health system, and gaps in demonstrated value to the health system long-term.

“We are not looking to expand into Walgreens or CVS. The cost for the space required is extremely high compared to other urgent care models. Retail pharmacy clinics haven’t created much activity within our system, whereas with urgent care, we have been extremely successful.” - CFO

Proportion of Leading Health Systems that Own or Operate Urgent Care and Retail Pharmacy Clinics



Although Most Own Their Facilities Today, Some Find Partnership Models to Offer Competitive Advantage

Health systems looking for expertise, consumer-focus, and speed-to-market find value in partnering

Ownership Model

62% of health systems own all of their urgent care (UC) facilities

Benefits cited:

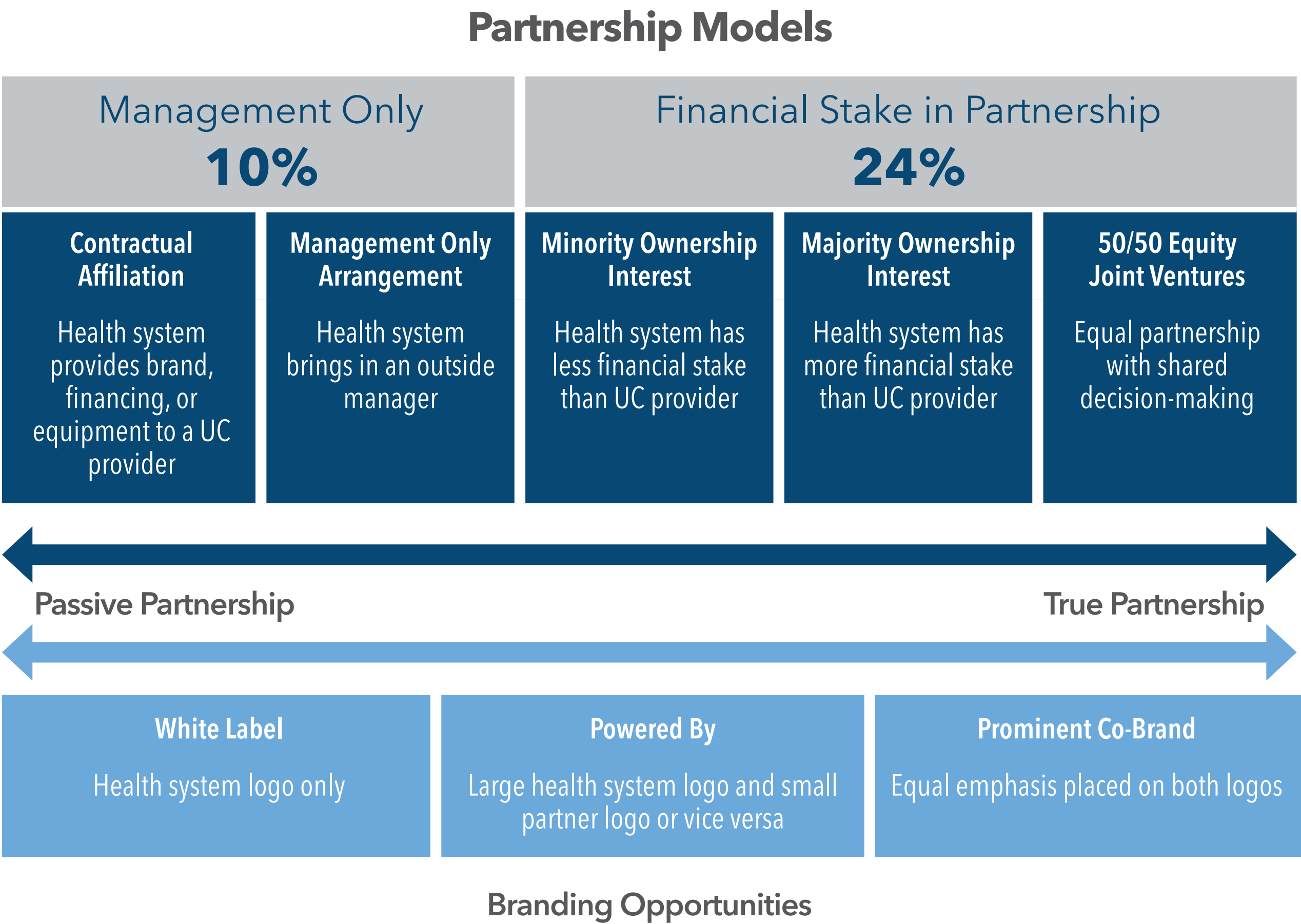
- Opportunity to bolster clinical integration across the health system
- Opportunity to maintain brand recognition
- Control over clinical quality and staff

Partnership Model

24% partner with an external company for all of their facilities; whereas 14% own the majority of their urgent care facilities but partner with an external urgent care company for others

Benefits cited:

- Urgent care specific expertise, experience, and focus
- Capital efficiency
- Speed-to-market and the ability to execute
- Consumer focus



Note: Percentages only available for health systems that reported the nature of their partnerships.

Meeting Consumer Demand is the Top Driver of Urgent Care

Top three drivers have remained relatively consistent over the past three to five years

Meeting Consumer Demand is Primary Driver of Growth

Health systems’ initial impetus for growing their urgent care networks revolved around meeting consumer demand for more convenient and accessible care. Today, 82% of executives indicate meeting consumer demand is a top driver, an increase from the 65% that indicated this was a top driver three to five years ago.

Urgent Care Viewed as Opportunity to Grow Revenue and Capture New Patient Volume

Not far behind meeting consumer demand, health systems are also capitalizing on a unique opportunity to grow revenue and capture new patients that are otherwise unlikely to enter the health system (e.g., millennials, etc.). Today, 76% of executives indicate growing revenue and capturing new patients is a top driver, an 11 percentage point increase from the 65% that indicated this was a top driver three to five years ago.

Alleviating Emergency Department Pressure is Less Impactful to Strategies Today

Health systems are relying less on urgent care clinics to alleviate pressure from trauma centers and emergency departments (EDs). Rather, health systems view urgent care as a distinct opportunity to bring in new revenue. Today, only 35% of executives indicate alleviating ED pressure as a top driver, a 25 percentage point decrease from the 60% that indicated this was a top driver three to five years ago.

Top Drivers of Urgent Care Strategies	Initial Driver	Current Driver	Change
To meet the demands of the consumer and create a better experience for our patients	65%	82%	↑
To capitalize on a unique opportunity to grow revenue and capture new patient volume	65%	76%	↑
To alleviate pressure from trauma centers or emergency departments	60%	35%	↓
To be a market leader and innovator in urgent care	30%	35%	↑
To protect our market share from for-profit competitors	25%	29%	↑
To influence patients’ downstream choices and generate referrals	25%	24%	↔
To serve as an alternative to building more costly primary care physician networks	15%	12%	↓
To lower the cost of care for our patient population enrolled in risk-based programs	5%	18%	↑
To benefit the commercial managed care strategy	10%	0%	↓

Substantial Opportunity for New Patients & Market Share

Health systems seek to capture new patients across the continuum of care

Generating Referrals Increases Revenue Potential

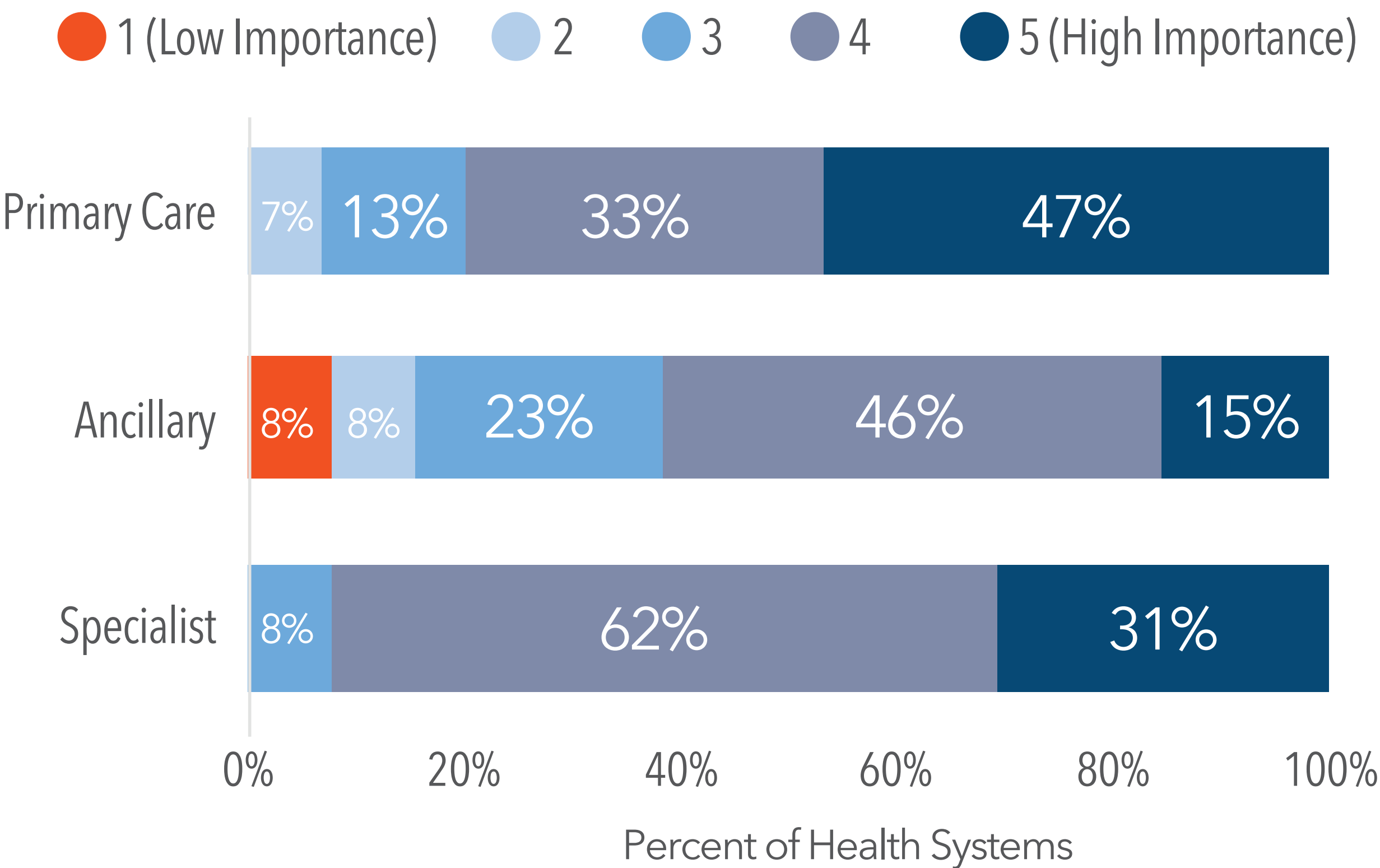
Influencing patients’ downstream choices and generating referrals from urgent care visits is a top incentive for many health systems to strengthen their urgent care strategies. Health systems place a strong emphasis on generating primary care referrals (80%), ancillary care referrals (61%), and specialist referrals (93%) from urgent care visits. Like other referral processes within the health system, generating referrals in the urgent care space allows for revenue growth and net new patient growth, as patients continue to receive care across other settings in the health system.

Increasing Connectivity of Care Improves Long-Term Outcomes of Patient Populations

Referrals generated from urgent care allow for connectivity of patient lives across the health system’s network. Greater connectivity is viewed as a way to improve long-term outcomes, as patients that have entered the system are more likely to receive care coordination across the continuum.

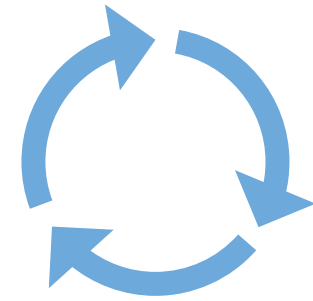
“We are focusing on referrals, and trying to increase the overall, ‘connected lives or unique lives’ to our entire system of care.”
- CFO

Importance Placed on Generating Referrals



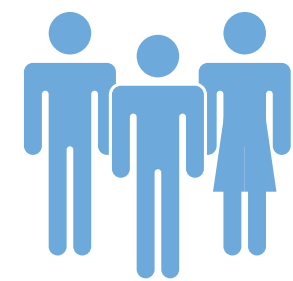
Note: Numbers may not add up to 100% due to rounding

Executive Perspectives: Urgent Care Viewed as a Sustainable Strategy Driven by Consumer Demand



Urgent Care Viewed as a Sustainable Model

"We have seen a mild decrease in ED numbers, but no decrease in urgent care numbers. We are tapping into an underserved, under-supplied area. Urgent care is driving savings and reaching populations that aren't normally reached." - CFO



Consumer Demand Heavily Influences Current Strategy

"We have had urgent care centers dating back to the '80's. Initially, we needed a relief valve for some patients. In the last five to seven years, we have really analyzed patients and services, and it's all about access. Our strategy now is to have ambulatory sites where patients are and where there is a dense population base that we are not able to access." - CSO



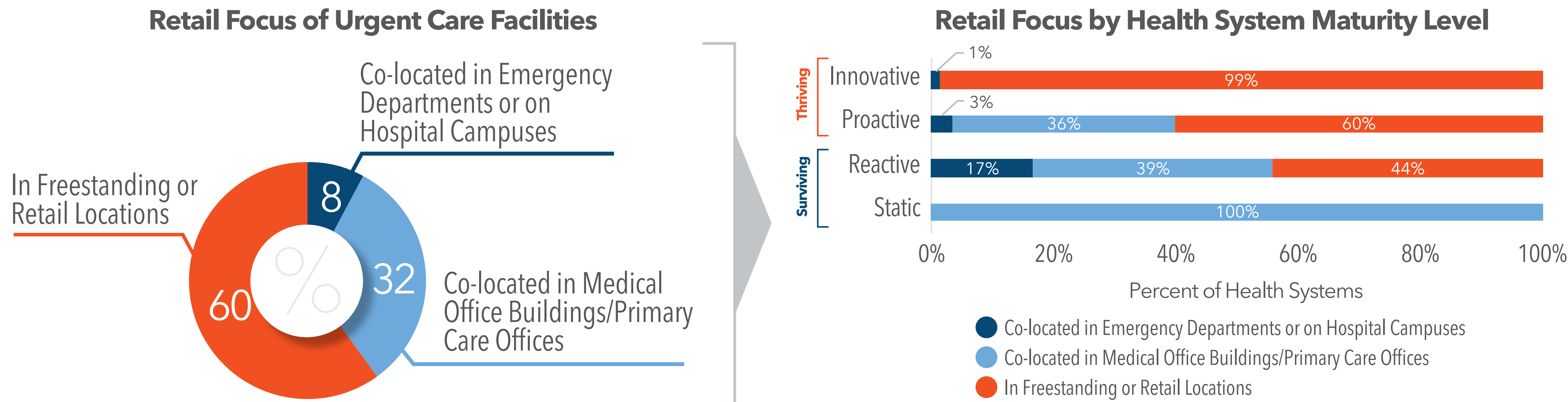
Referrals Allow for Revenue Growth and Connectivity of Patient Lives

"The point of Epic and having the joint venture is that they refer everyone in the system that needs additional services. All of our physicians and Advanced Practice Providers (APPs) are our employees, and they send patients and patient information downstream." - SVP of Finance

Implementation

Retail focus, challenges faced, & measuring success

Thriving Systems More Likely to Increase Retail Focus



Co-Located in Emergency Departments or on Hospital Campuses

Few health systems (8%) prefer co-locating urgent care clinics in emergency departments (EDs) or on hospital campuses. These clinics are typically structured as emergency care and urgent care hybrids, with some executives referring to this strategy as “ERlight.” Health systems use this strategy to alleviate pressure from trauma centers, decrease wait times, and redirect patients to the appropriate level of care.

Located in Medical Office Buildings or Primary Care Offices

Roughly one third of health systems (32%) prefer co-locating urgent care in medical office buildings (MOBs) or primary care physician (PCP) offices. Benefits to this strategy were cited as: seamless integration with primary care and providing additional hours of operation outside of primary care office hours.

Freestanding Clinics or Retail Locations

A majority of health systems (60%) place their urgent care clinics in freestanding or retail locations. In particular, innovative health systems are more likely to pursue this strategy, recognizing the consumer demand to build clinics in geographically-dense, high-traffic locations and away from congested hospitals or medical buildings.

Thriving Organizations Invest in Non-Traditional Services

Health Systems Strive to Offer 'One-Stop Shop'

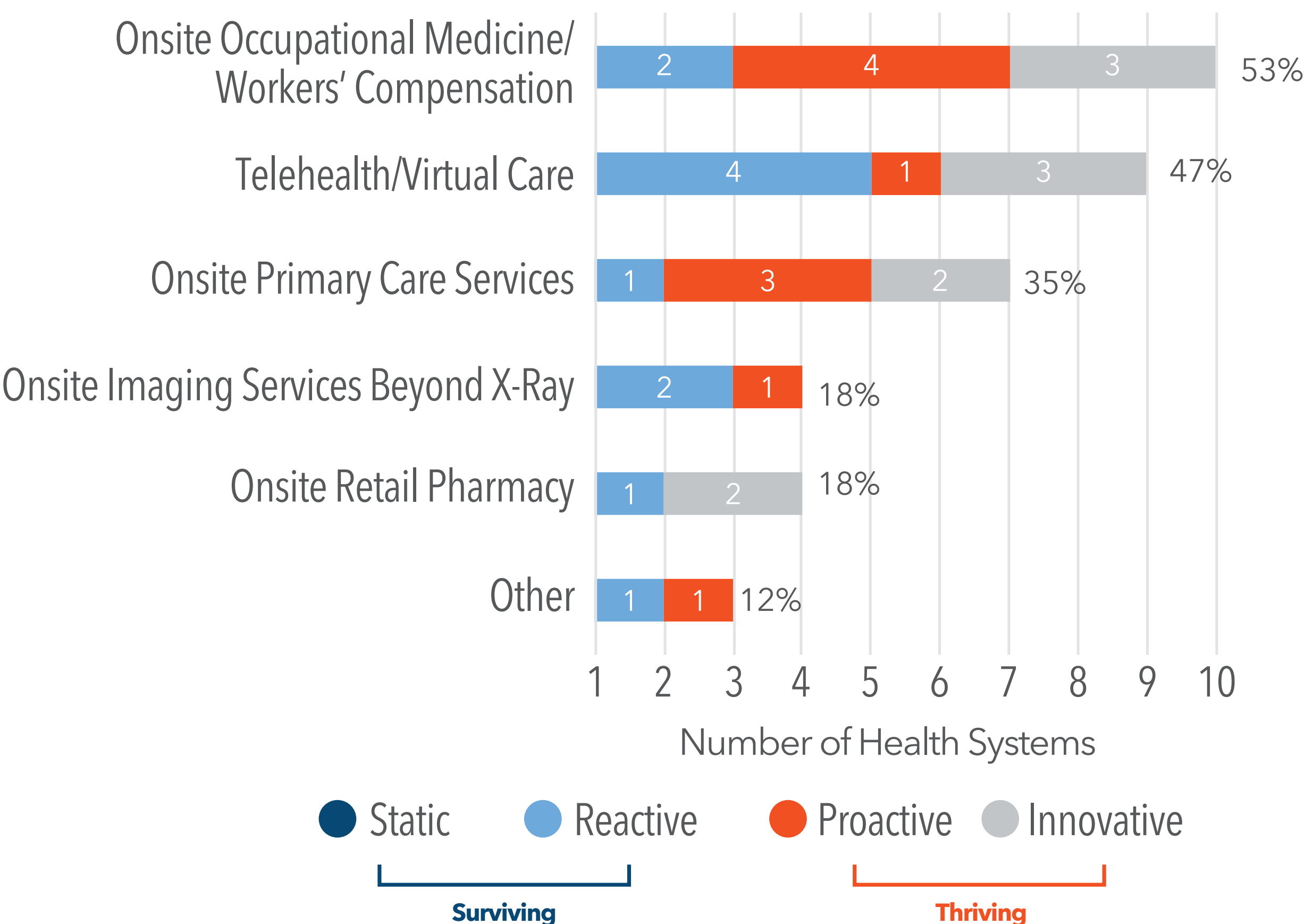
Health systems recognize the need to meet the rising consumer demand for in-house, non-traditional urgent care services at their facilities. The most common non-traditional services offered include onsite occupational medicine/workers' compensation care (53%), telehealth/virtual care (47%), and onsite primary care services (e.g., mammograms, eye exams, routine and seasonal vaccinations) (35%). Eighty-five percent of health systems plan to add at least one of these services in the next three to five years, with telehealth representing the most likely service to be added.

Some Experiment with Different Care Models

Health systems are refining their models to meet unique consumer demands or attract different clientele. Examples include:

- Providing evening and weekend hours or adopting 24/7 operating hours
- Increasing digital consumer acquisition tools
- Placing locations strategically near high-traffic geographic areas or adjacent to other medical buildings
- Having certain physicians onsite (e.g., pediatricians)
- Offering commonly prescribed medications onsite

Non-Traditional Services Offered in Urgent Care



Many Shift Staffing Models to Improve Cost Efficiencies & Consumer Experience

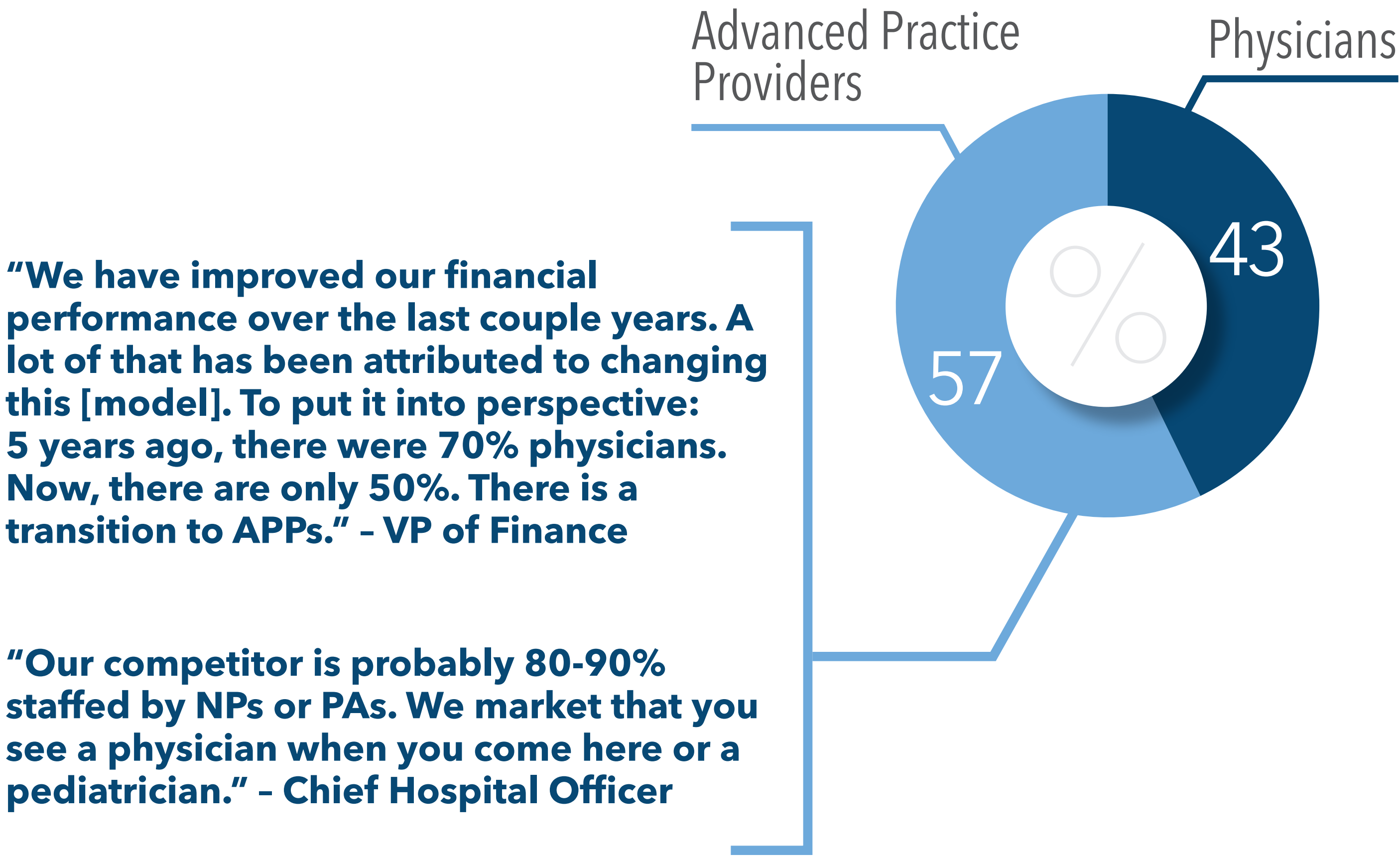
Increasing Use of Advanced Practice Providers

Urgent care clinical staffing models have shifted from a greater number of physicians (MDs) to a greater number of Advanced Practice Providers (APPs). On average, health systems surveyed report their clinical staffing model consists of 43% physicians and 57% APPs. This APP-centric model allows health systems to cut down on costs and improve financial performance. Health system executives also report that nurse practitioners (NPs) and physician assistants (PAs) often receive consumer-oriented training, and tend to outperform physicians in patient satisfaction and consumer experience.

Some Continue to Place an Emphasis on Physician-Heavy Models

Some health systems report maintaining a physician-heavy urgent care staffing model in order to preserve clinical quality. These systems acknowledge that many of their competitors have APP-heavy models, but believe patients feel more comfortable when being treated by a physician in urgent care settings.

Clinical Staffing Models Across Health System Owned Urgent Care Facilities

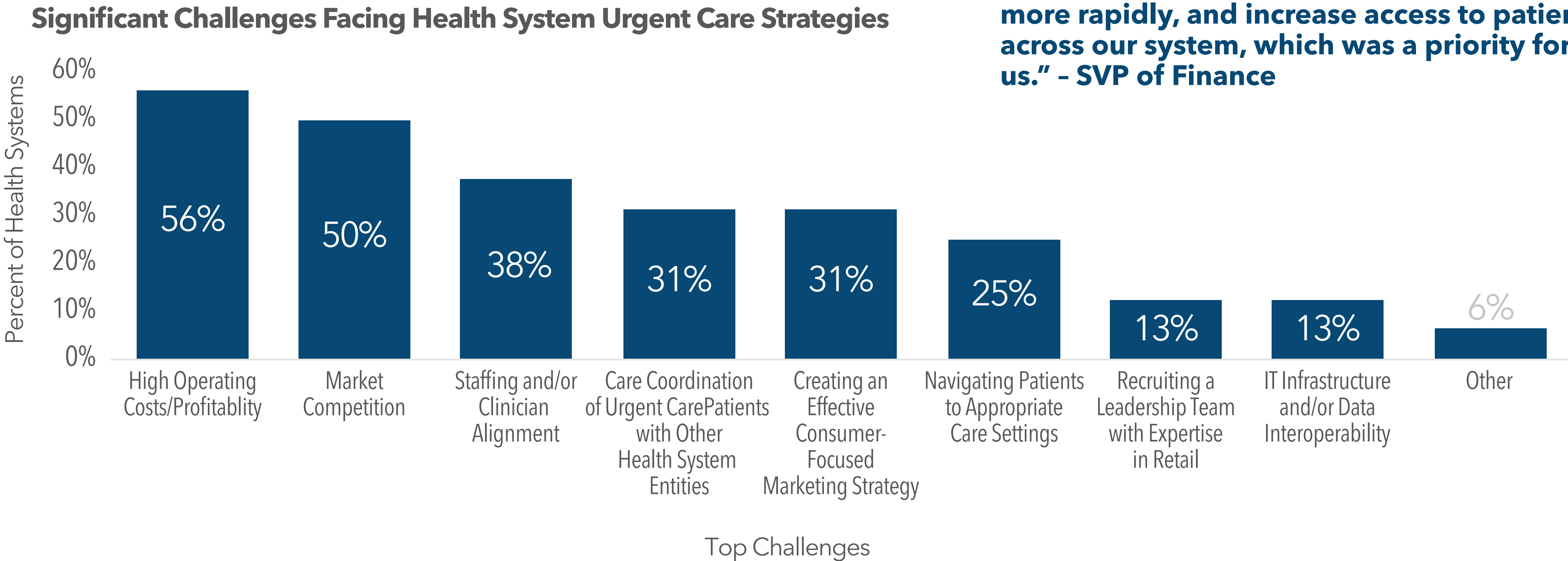


Health Systems Face Common Challenges Across Markets

Health systems face common challenges, including high operating costs, profitability, market competition, staffing, and clinician alignment. While some health systems find urgent care to be profitable compared to other care settings, others find urgent care clinics to be cost prohibitive, particularly if payer rates are low in their markets. LHS find themselves competing with other health systems for market share, but also with entities such as CVS, Walgreens, and potentially new entrants (e.g., Amazon). To remain competitive, LHS will need to strategically address these challenges through non-traditional mechanisms. For example, some health systems seek solutions through virtual/telehealth platforms or partnership opportunities with urgent care companies.

Some Seek Solutions Through Partnership Models

“For a long time, we owned our own clinics, but operated them inefficiently. So we partnered with a company with a much more efficient operating structure. Partnering with someone whose sole focus is urgent care was helpful to us. They could open locations more rapidly, and increase access to patients across our system, which was a priority for us.” - SVP of Finance

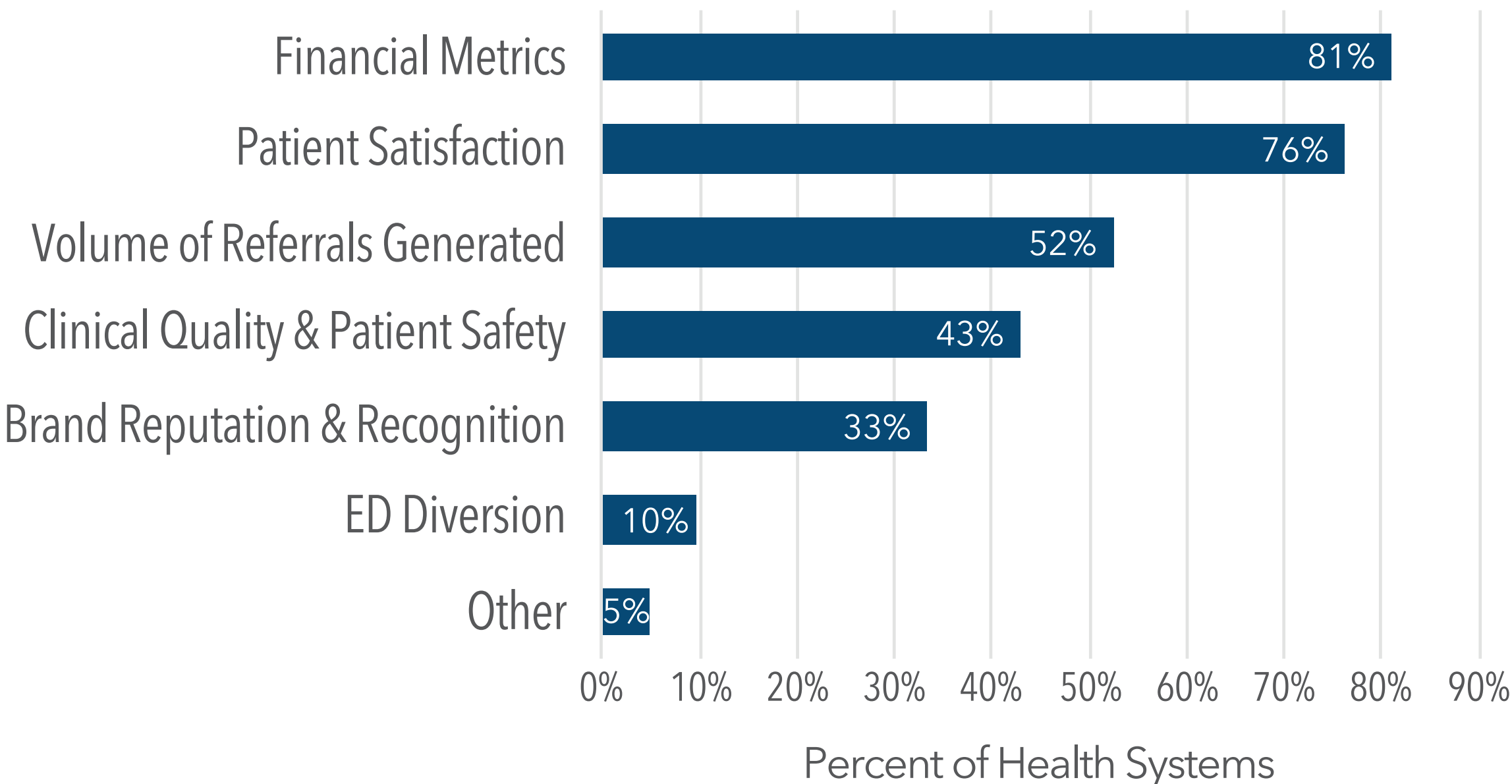


Success Measured through Financial, Experience, & Referral Metrics

Focus Areas Driving Urgent Care are the Most Heavily Tracked Metrics

The top three metrics of operational success in urgent care for health systems are financial metrics (81%), patient satisfaction (76%), and volume of referrals generated (52%). These metrics align with the top three factors driving systems' urgent care strategies (i.e., meeting consumer demands and creating a better patient experience, capitalizing on growing revenue, and alleviating pressure from emergency departments), indicating the importance of leveraging urgent care to strengthen both the health system's overall consumer strategy and to increase revenue.

Measuring Urgent Care Operational Success



Commonly Used Metrics

There are a variety of ways in which health systems track success.

Financial Performance

- Revenue (e.g., net revenue per encounter)
- Profitability (e.g., of the overall venture and the urgent care site)
- Operating cash flow
- Investment in the urgent care practice
- EBITDA (e.g., high performing health systems were described as those operating with a 20-30% EBITDA margin)

Patient Satisfaction and Consumer Experience

- Net Promoter Score
- NRC Picker
- Press Ganey Surveys
- Wait times

Volume of Referrals Generated

- Encounters across settings with varying levels of acuity (e.g., Levels 1-5)
- Number of downstream referrals to primary care or specialty care

Executive Perspectives: Enhancing the Consumer Experience



The Majority of Urgent Care Clinics are in Freestanding or Retail Locations

"Our urgent care locations are not near the hospital. That would be a mistake. They are in retail locations. People who go to urgent care don't want to go to a hospital. They want it easy, convenient, and high-end. Urgent care is as different from a hospital as a Chick-fil-A is different from a hospital. It [urgent care] behaves much more like a Chick-fil-A." – SVP of Urgent Care



Health Systems Try to Provide Consumers with a 'One-Stop Shop'

"We looked at adding retail pharmacy at one of our busier locations, but we didn't have space. When you think about the consumer, it would be nice to have. We offer occupational medicine and physicals. MinuteClinics do this type of work, and we want to be competitive with them." – VP of Finance



APP-Centric Model Saves Costs and Improves Experience

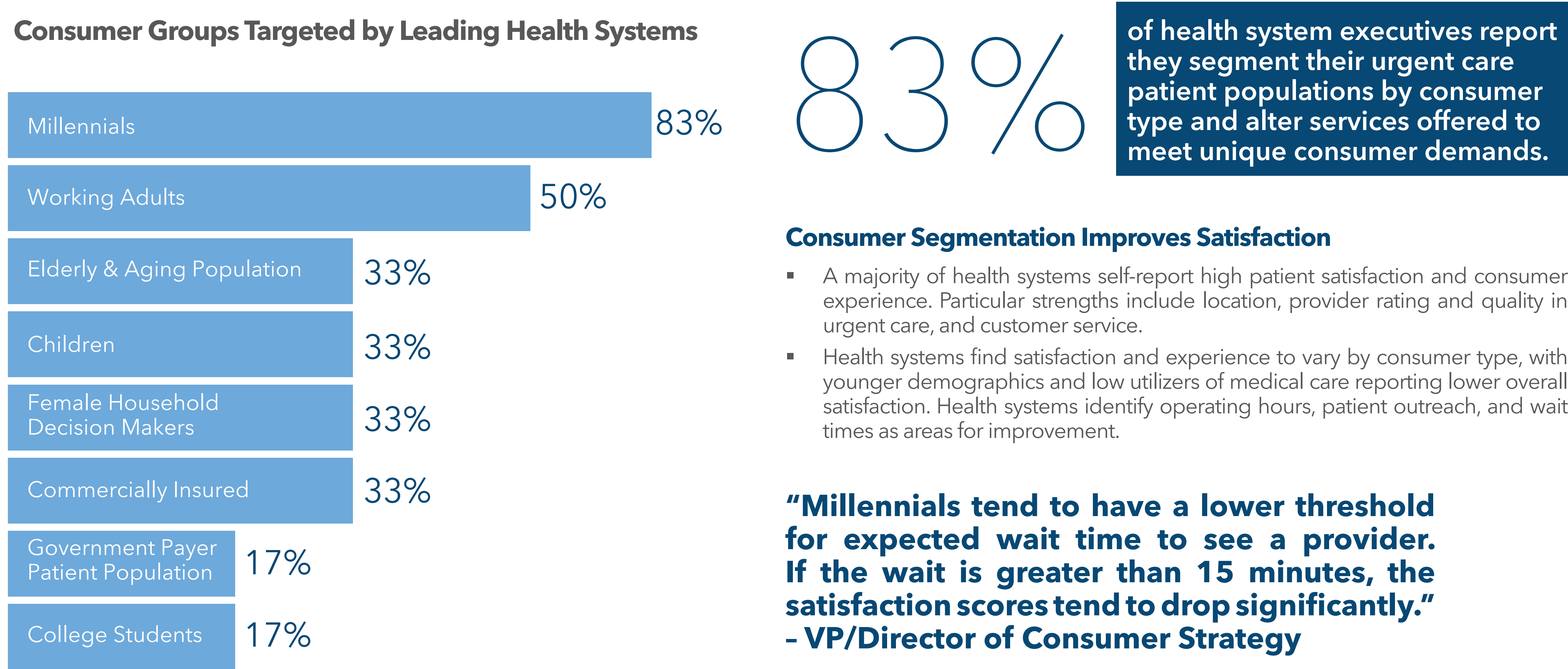
"We have physicians in every [urgent care] location. However, we have clinics open until 9 pm at night, and there is not a physician there for all operating hours. We use APPs at all of our sites and will supplement with APPs during other hours." – CSO

Consumer Engagement

Consumer segmentation and marketing strategies

Thriving Systems Segment their Consumers to Enhance Experience

Millennials and working adults are amongst the most commonly targeted consumer groups



Multi-Channel Marketing Engages Diverse Consumer Populations

Multi-channel marketing maximizes reach across generations and accounts for diverse preferences



Marketing Often Focused on Redirecting Patients Appropriately

Redirecting to Appropriate Settings of Care Benefits Both the Health System and the Consumer

For many patients, choosing between emergency, primary, and urgent care settings has added an additional level of complexity to an already difficult healthcare decision-making process. The increase in alternative sites of care, like urgent care and retail pharmacy clinics, have increased the need for decision-support tools and marketing campaigns that spread awareness and education to patients about different sites of care.

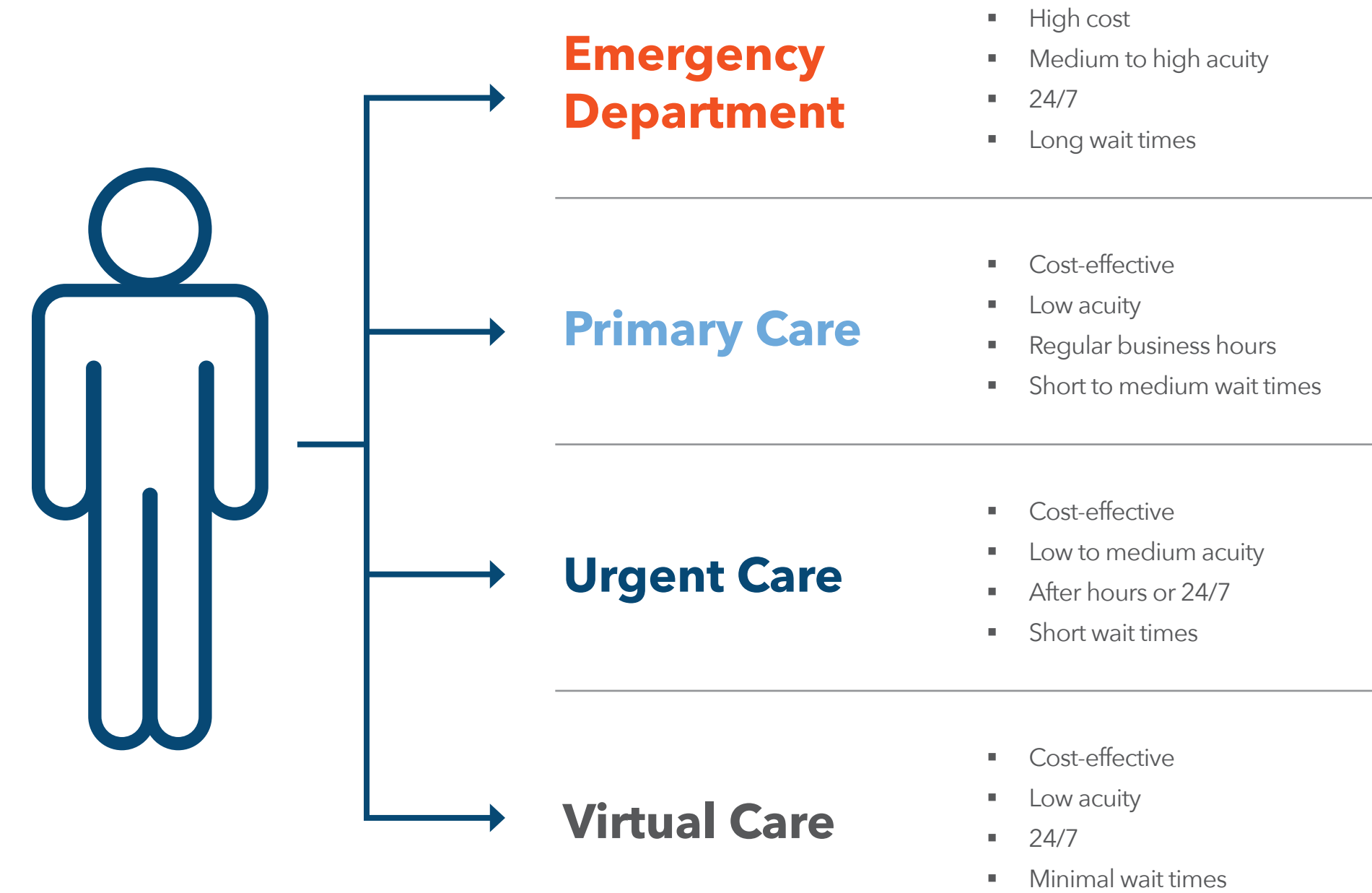
To address this issue, many LHS focus on directing patients to the right settings of care through marketing initiatives and stronger care coordination efforts across their networks. Optimizing patient flow between emergency departments, primary care offices, and urgent care clinics is top of mind for health system executives looking to deliver high quality and cost-effective care.

One LHS Approach to Patient Redirection

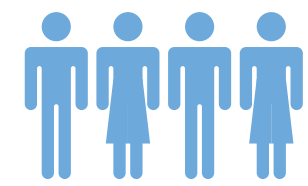


Source: BayCare <https://baycare.org/>

“Our slogan is ‘Right site. Right service.’ We try to constantly get the message to the right people and direct patients to the appropriate site of service. To do this, we use robust data analytics to look at encounters and referrals.” - CSO



Executive Perspectives: Segmentation and Awareness of Unique Consumer Profiles Allows for Smart Engagement



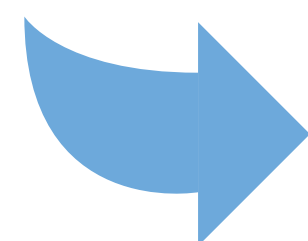
Segmentation is Valuable to Health Systems, but Most Focus on Attracting All Patients

"Nationally, the average age of those going to primary care is ten years older than those going to urgent care, but there is a lot of grey area. For example, there are a lot of 80 year old people in urgent care. So, we don't just target one population; however, it's still beneficial to know who the majority of our urgent care patients are." – SVP of Urgent Care



Multi-Channel Marketing Helps Drive Awareness and Use of Urgent Care Facilities

"We market really broadly. A lot of it is digital. We are trying to do a campaign around 'Where is the best service for what you need?' We do a lot of social media. Our 13 urgent care clinics have 200,000 annual visits. They are really cranking through a lot of volume." – CSO



Redirecting Patients Beneficial to Both Patient and Health System

"There is high collaboration with the ED. They have a pathway for patients if they present to one of our urgent cares and we can't handle the pathway. Have all of that in place." – VP of Finance

Future Outlook & Informed Practices

Leading Health Systems experience success across
unique markets

Urgent Care Expected to Drive Care Redesign Across Systems

Health systems continue to evolve in a delivery system that is rapidly moving from volume-based approaches to one that rewards value. As such, health systems seek to both expand their networks, while also controlling the level of efficiency and quality of care delivered. Building out strong urgent care networks has allowed health systems to capture new patient populations and simultaneously deliver low-cost, high-value care.

Looking ahead, most health systems envision primary care offices to expand care delivery for chronic conditions, while urgent care settings continue to serve patients in need of higher acuity care. Nearly all executives expect a major shift towards the use of more “asset light” strategies (e.g., virtual care visits) across the care continuum. Thus, as the demand for urgent care rises, executives expect efficiency gains across all care settings.

Financial Perspective

“I think the millennial generation really values access and convenience more than the PCP relationship. If you have a lot of chronic conditions, that is where primary care needs to excel. If you have a cold, a UTI, dehydration, or a sprained ankle, you don't need to go to the PCP for that. You need someone who can take care of you as quickly as possible.”

- CFO

Consumer Perspective

“We feel that there will be a greater shift towards using technology (e.g., virtual care) for lower acuity visits and the ‘brick & mortar’ urgent care will shift to treating higher acuity visits.”

- VP/Director of Consumer Strategy

Operational Perspective

“We expect to see a migration of more PCP and specialty services offered within urgent care. More competition will continue to enter the market (e.g., Walgreens, CVS, Amazon, etc.), and I expect to see the growth of telehealth cross into other markets. We are looking at ways to move toward more Advanced Care Practitioner-centric models, build out telehealth to capture the growing demand for virtual visits, and strategically look at markets and coordination of services for more risk-based strategies.”

- VP/Director of Operations

Success of Urgent Care Strategy Influenced by Market Dynamics

Consumer Readiness

Consumer readiness to adopt urgent care varies by market. Health system success is often dependent upon:

- Strength of care delivery network and general access to care in the market.
- Settings of care (e.g., primary care) that may be in higher demand in the market due to higher quality or accessibility.

Competition

The level of competition between urgent care providers varies by market. Health system success is often dependent upon:

- Market share of urgent care competitors.
- Strength of brand recognition across competitors.
- Strength of offerings across existing competitors and potential new entrants (e.g., technology companies, etc.).

Payer Receptivity

Payer attitudes towards urgent care vary by market. Health system success is often dependent upon:

- Reimbursement rates across payers in the market for urgent care (e.g., payer likelihood to pay more for urgent care than primary care).
- The opportunity for health systems to attract and retain strong payer contracts in the market.



"You have to determine what the adoption curve will be in each market and look at overall access to care. The market may not need urgent care. For example, we didn't go into a particular market because it already had more sophisticated and a greater quantity of primary care." - CFO

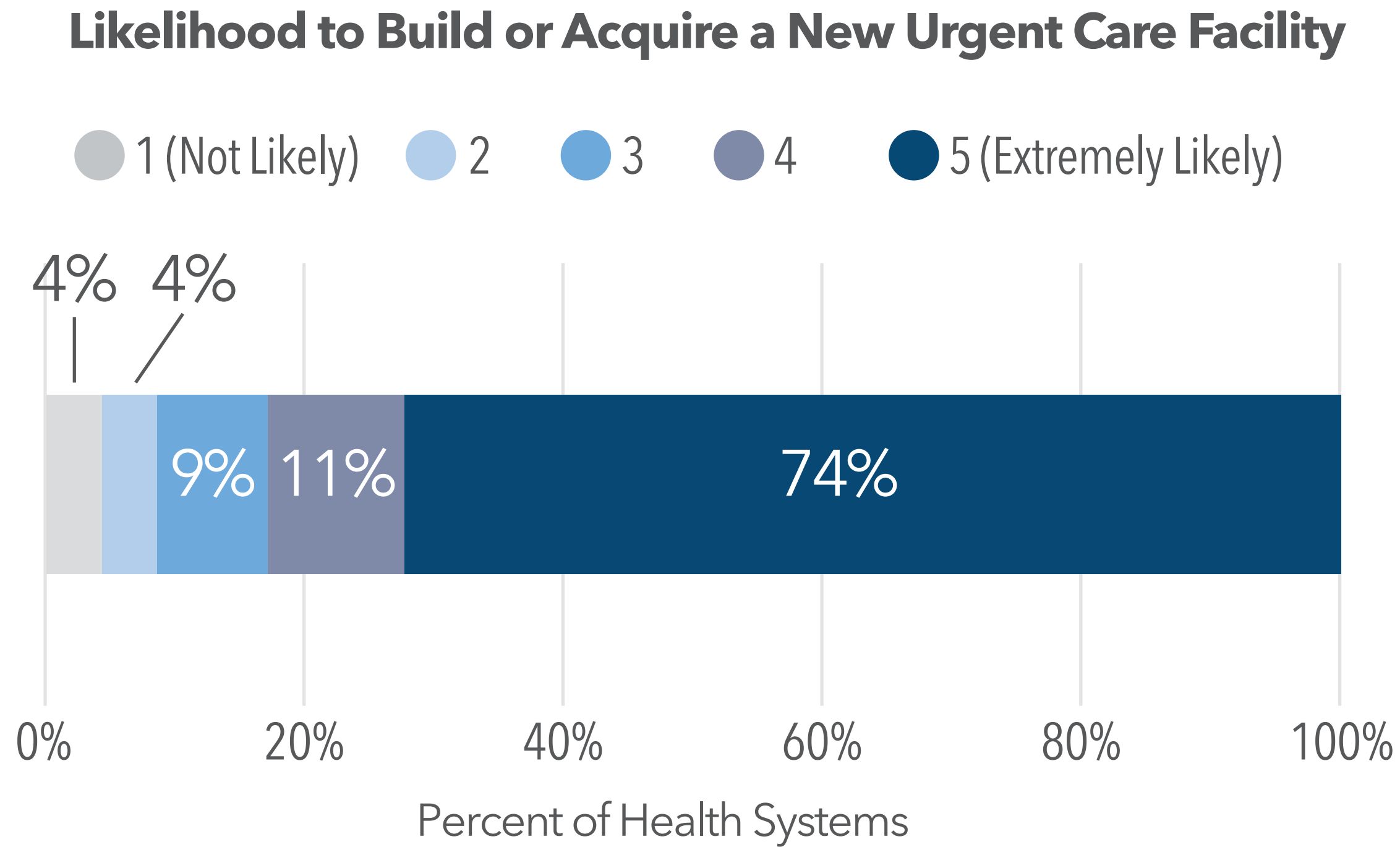
"If we are the first to disrupt the market, that opens it up to all payers. Health plans are more than happy to contract - they see the value of paying for urgent care after hours rather than emergency visits. In terms of value-based contracts, we have tried to go to a global rate per visit. We have been able to negotiate a few." - CFO

Many Still Able to Thrive Across Unique Markets

Despite complex market dynamics, many health systems are still able to thrive in the urgent care space

Health System A	Health System B	Health System C
<p>Demographics Size: Small (<\$2 B TOR) Outpatient Visits: 0.5M</p> <p>Market Dynamics Consumer Readiness: High Competition: Medium Payer Receptivity: Currently working on leveraging urgent care with payers</p> <p>Strategy & Implementation Partnership Structure: Outright own Percent of Freestanding Clinics: 63% Innovative Service Offerings: Onsite primary care, onsite occupational medicine/workers' compensation Clinician Staffing Model: 50% physician, 50% APP Success Metrics: Financial, clinical quality, brand reputation</p>	<p>Demographics Size: Medium (\$2-5 B TOR) Outpatient Visits: 1.3M</p> <p>Market Dynamics Consumer Readiness: High Competition: High Payer Receptivity: Strong contracts; Payers understand cost-effective nature of urgent care</p> <p>Strategy & Implementation Ownership Structure: Partner for all Percent of Freestanding Clinics: 100% Innovative Service Offerings: Onsite primary care, onsite retail pharmacy, onsite occupational medicine/workers' compensation, telehealth/virtual urgent care Clinician Staffing Model: APP-heavy Success Metrics: Financial, volume of referrals, coordinated care</p>	<p>Demographics Size: Large (>\$5 B TOR) Outpatient Visits: 5.3M</p> <p>Market Dynamics Consumer Readiness: High Competition: High Payer Receptivity: Strong contracts; Payers understand cost-effective nature of urgent care</p> <p>Strategy & Implementation Ownership Structure: Outright own Percent of Freestanding Clinics: 100% Innovative Service Offerings: Onsite primary care, onsite retail pharmacy, onsite occupational medicine/workers' compensation, telehealth/virtual urgent care Clinician Staffing Model: Physician-heavy Success Metrics: Financial, clinical quality, patient satisfaction</p>

Most Plan to Expand, Yet Few are Prepared to Compete with New Market Entrants



Average Likelihood to Expand Across Maturity Levels

Static	2.7
Reactive	4.7
Proactive	4.6
Innovative	5.0

Note: Numbers may not add up to 100% due to rounding

Informed Practices for Disrupting the Urgent Care Market

Health systems are looking to expand their urgent care footprint, with 74% indicating extreme likelihood to build or acquire a new urgent care facility in the next five years. Systems that are less likely to expand are either located in a heavily saturated and competitive market, or are focused solely on building out primary care.

Although the majority of health systems are interested in expanding, few are truly prepared to compete with new market entrants. The Academy categorized 11% percent of LHS as “innovative.” These health systems are deemed to be prepared for long-term success in the urgent care space. These innovative, or market-disrupting, health systems tend to:

- Identify consumer readiness, the competitive landscape, and payer dynamics for each of their markets;
- Maintain exceptional operational performance while also pursuing non-traditional offerings;
- Focus on consumer-centric strategies;
- Continually monitor and strengthen brand recognition;
- Identify potential unknown competitors and prepare to innovate and compete with these new entrants;
- Leverage support of external partners if operational performance, speed to market, and/or consumer-focus are areas of weakness.

Methodology

Methodology

In July and August of 2019, the Health Management Academy conducted a quantitative survey and qualitative interviews with Leading Health System executives regarding their urgent care strategies. The 28 total respondents represent 25 unique health systems. Respondent roles included Chief Financial Officer, Chief Innovation Officer, Chief Medical Officer, Chief Operating Officer, Chief Strategy Officer, Chief Hospital Officer, VP/Director of Consumer Strategy, VP/Director of Finance, VP/Director of Operations, VP of Programs and Ancillary, VP/Director of Strategy, Corporate Vice President, EVP of Business Development, Manager of Business Development, and SVP of Urgent Care.

The responding health systems have an average Total Operating Revenue of \$5.0 billion and own or operate a total of 432 hospitals.

The Academy Project Team

Sanjula Jain, PhD, Executive Director, Research & Advisory

Study Authors

Jackie Risco, Associate Director, Research & Advisory

Raquel Davis, Associate, Research & Advisory

Research Support

Victoria Stelfox, Senior Analyst, Research & Advisory

Anita Wang, Data Analyst, Research & Advisory

Production

Anthony Casini, Senior Graphic Designer

Ali Joseph, Coordinator, Research & Advisory

Disclaimer

The information and opinions in this report were prepared by The Academy. The information herein is believed to be reliable and has been obtained from public and proprietary sources believed to be reliable. All survey data and responses are collected in good faith from sources with established expertise and are believed to be reliable. Opinions, estimates, and projections in this report constitute the current judgement of the authors as of the date of this report. They do not necessarily reflect the opinions of The Academy and are subject to change without notice. Any products referenced within this report have not been independently evaluated. Neither The Academy nor GoHealth recommends or endorses any of the products identified by survey respondents. All registered names or brands referenced in this document remain the property of their respective owners and are included for identification purposes only. This report is provided for informational purposes only. Any reproduction by any person for any purpose without The Academy's written consent is prohibited.

Participating Health Systems



Note: Several executives completed study on behalf of original health system they represented prior to a merger or acquisition

The Academy

The Health Management Academy (The Academy) brings together health system leaders and innovators to collectively address the industry's biggest challenges and opportunities. By assisting member executives to cultivate their peer networks, understand key trends, develop next-generation leaders, and partner to self-disrupt, they are better positioned to transform healthcare.



100 Health Systems

500+ C-suite Executives

2,000+ Health System Leaders

66%

Inpatient
Admissions

62%

Outpatient
Visits

67%

Total
Physicians

62%

Total Operating
Revenue

About GoHealth Urgent Care

GoHealth is reinventing the urgent care model around personalized and connected consumer experiences, with a focus on technology, community access, and patient-centered design. GoHealth is the largest partnership-focused urgent care company in the U.S. and operates over 135 urgent care centers across nine states. GoHealth's centers are deeply integrated with its health system partners' clinical operations and electronic medical record systems, further elevating urgent care's impact on value-based care and population health management. GoHealth also plays a lead role nationally in urgent care clinical quality measures and continues to achieve 80+ Net Promoter Scores (NPS).

For more information, please visit gohealthuc.com.

The Academy extends its appreciation to GoHealth Urgent Care for their sponsorship of this project.

