



# Robust Urgent Care De Novo Growth Continues

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**Table 1. Year-Over-Year Change In The Number Of De Novos By Health System Vs. Non-Health System**

	2022 to 2023(F)	2021 to 2022	2020 to 2021	2019 to 2020	2019 to 2023(F)
<b>Total De Novos</b>	<b>-5%</b>	<b>20%</b>	<b>6%</b>	<b>-4%</b>	<b>16%</b>
Health System	-3%	3%	-3%	-12%	-23%
Non-Health System	-6%	30%	-27%	-62%	49%

**Table 2. Year-Over-Year Change In The Number Of De Novos By Size**

	2022 to 2023(F)	2021 to 2022	2020 to 2021	2019 to 2020	2019 to 2023(F)
Single Unit Operator	-9%	41%	-3%	-12%	9%
2 to 4 Unit Operator	-5%	61%	-27%	-62%	-57%
5 to 9 Unit Operator	-17%	46%	-19%	-10%	-12%
10+ Unit Operator	1%	-1%	32%	240%	347%

F=Forecasted

The urgent care industry continues to add de novo centers, according to data from Experity and National Urgent Care Realty. Although de novo growth slowed in 2023 by 5%, 2023 de novos are still 16% higher than 2019, the last pre-pandemic year. In addition to continued overall growth of the industry, the data indicates structural changes in *who* is opening de novos.

A “de novo” urgent care refers to a center that did not previously exist. To clarify, there’s a difference in the growth rate of urgent care rooftops, which nets de novos against closures, and the growth rate of de novos. The tables above deal with the latter—a year-over-year comparison of urgent

care de novos.

**Table 1** demonstrates that health system de novos (including hospital joint ventures) are down 3%, and non-health system de novos are down 6%. However, compared to 2019, health system de novos are down 23%, whereas non-health system de novos are up 49%.

**Table 2** demonstrates that growth in the time period from 2021 to 2022 was led by 2-4 center operators, however, when comparing their growth across the longer time frame, the 2-4 unit operators have sustained a decrease in de novo sites of 57%. Meanwhile, 10+ unit operators have seen a 347% increase in de novos.

Independent, single location sites follow “enterprise” with a 9% increase in de novos compared to 2019. ■



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