Urgent Care De Novo Growth by Operator Size, 2022-2023

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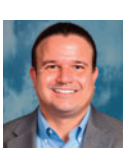
	1Q22	2Q22	3Q22	4Q22	2022 Total	1Q23	2Q23	3Q23	4Q23	2023 Total	YOY Change
Total De Novos	366	466	327	492	1,651	484	364	335	357	1,540	-7%
% Health System	38%	35%	22%	24%	30%	32%	34%	25%	35%	32%	6%
% Non-Health System	62%	65%	78%	76%	70%	68%	66%	75%	65%	68%	-3%
	1Q22	**2Q22**	**3Q22**	**4Q22**	**2022 Total**	**1Q23**	**2Q23**	**3Q23**	**4Q23**	**2023 Total**	**YOY Change**
Single Unit	53	69	39	139	300	79	81	67	46	273	-9%
2 to 4 Units	71	105	76	64	316	104	81	61	54	300	-5%
5 to 9 Units	71	77	54	47	249	70	46	48	33	197	-21%
10+ Units	171	215	158	242	786	231	156	159	224	770	-2%
	1Q22	**2Q22**	**3Q22**	**4Q22**	**2022 Total**	**1Q23**	**2Q23**	**3Q23**	**4Q23**	**2023 Total**	
Single Unit	14%	15%	12%	28%	18.2%	16%	22%	20%	13%	17.7%	
2 to 4 Units	19%	23%	23%	13%	19.1%	21%	22%	18%	15%	19.5%	
5 to 9 Units	19%	17%	17%	10%	15.1%	14%	13%	14%	9%	12.8%	
10+ Units	47%	46%	48%	49%	47.6%	48%	43%	47%	63%	50.0%	

A compilation of 2022 and 2023 de novo urgent care center data shows a 7% decline in new locations: from 1,651 de novo centers in 2022 to 1,540 in 2023.

A "de novo" center is a new urgent care location where services were not offered previously. The unit of measure is the physical site, meaning if an existing location already in operation happened to change ownership, such change is not counted as de novo growth. If a center is closed permanently, meaning services are no longer offered at the location, then it is counted as a closure.



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The data provided here reflect gross additions, exclusive of closures.

Overall, as the de novos saw a decrease between 2022 and 2023, the greatest decline occurred among the 5- to 9-unit operators. Single unit and 2- to 4-center operators remained steady as a percentage of total de novos. Meanwhile, the least of the declines was seen among the large "enterprise" operators that have 10 or more urgent care units.

Last year produced the addition of 486 health-system-affiliated locations versus the 490 that were added in 2022. As a percentage of total de novos, health-system-affiliated participation increased by 6% year over year (YOY), while non-health-system-affiliated participation declined by 3%. ■