

## **Urgent Care Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-08-01 | 115 pages | Mordor Intelligence

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### **Report description:**

Urgent Care Center Market Analysis

The urgent care center market size stands at USD 28.81 billion in 2025 and will reach USD 37.71 billion by 2030, advancing at a 5.51% CAGR over the forecast period. Sector momentum reflects emergency-department overcrowding, partnerships between retail chains and health-systems, and rapid digital scheduling uptake, all of which steer patients toward lower-cost same-day care. Corporate chains keep scale advantages through standardized clinical protocols, while hospital-owned facilities accelerate site openings to relieve inpatient bottlenecks and to tighten referral loops. Service-mix evolution is unmistakable: trauma care still attracts the largest visit volumes, yet vaccination and preventive offerings now grow fastest as operators reposition sites as frontline primary-care hubs. Geographic reach broadens as operators pivot to rural communities where 57 million residents lack adequate access to hospital-based services. Heightened consolidation, expanding advanced-practice provider (APP) staffing needs, and reimbursement pressure from value-based insurance plans will shape competitive dynamics through 2030.

Global Urgent Care Center Market Trends and Insights

Emergency-Department Overcrowding Shifting Non-Critical Cases to Urgent Care

Median emergency-department wait times have risen 16% since 2014, funneling lower-acuity patients toward urgent care centers that can deliver equivalent treatment at lower cost. RAND research estimates that one-third of non-urgent ED encounters could be redirected, saving up to USD 4.4 billion annually. Hospitals consequently embed urgent care sites inside integrated delivery

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networks, transforming former competitors into throughput partners for ED de-congestion. Payer push toward site-of-care optimization reinforces the shift, as value-based contracts penalize unnecessary ED utilization. Collectively these demand-side and payer-side forces lock in steady volume growth for the urgent care center market.

#### Digital Scheduling & Tele-Urgent Add-Ons Enhancing Patient Capture Rates

Artificial-intelligence engines orchestrate patient intake, slot utilization, and documentation. CityMD's multi-year pact with Notable automates front-end tasks for nearly 200 clinics handling 4 million visits each year, coinciding with a 60% visit surge since 2019. Surveys show 55% of consumers now prefer digital channels and 74% rate appointment speed as decisive. Telehealth reached 39.3% adult utilization in 2022; 80.5% experienced no technical glitches and three-quarters deemed visit quality equal to in-person care. "Tele-untethered" models remove virtual waiting rooms, with 76% of users favoring freedom to multitask and saving 55 minutes per session. Digital capacity therefore heightens patient throughput, lifts net promoter scores, and entrenches competitive differentiation inside the urgent care center market.

#### Physician & Advanced-Practitioner Shortages in Rural and Suburban Catchments

Thirteen percent of Americans live in primary-care shortage areas, and the shortfall may swell to 49,000 physicians by 2030. Employing APPs mitigates gaps-63% of medical groups intend to add new APP roles in 2025-yet formal onboarding exists in only 70% of ambulatory sites. Rural EDs lack emergency physicians in 27% of counties, pushing urgent care centers to stretch clinician coverage with leaner staffing ratios. Productivity rises when APP penetration deepens, but competition for talent inflates labor costs and may slow clinic roll-outs, tempering the urgent care center market CAGR.

Other drivers and restraints analyzed in the detailed report include:

Active-Lifestyle Injuries Among Millennials & Gen Z Populations / Expansion Of Value-Based & High-Deductible Insurance Plans Favoring Low-Cost Settings / State-Level Certificate-Of-Need / Licensing Hurdles (US, EU Select Markets) /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Trauma and injury care accounted for 32.23% of 2024 revenue, underscoring an enduring core at the urgent care center market's clinical mix. On-site X-ray, fracture stabilization, and laceration repair divert patients from EDs and offer favorable payer economics. Acute illness management ranks second, handling respiratory and gastrointestinal conditions with rapid throughput. Diagnostic advances now include ultrasound and advanced imaging, raising average ticket size.

Vaccination and preventive offerings expand fastest at a 7.12% CAGR, reshaping centers from episodic venues to comprehensive health destinations. Mass immunization campaigns and travel medicine bundles fill scheduling valleys, while AI-driven triage engines support standardized care. A Cedars-Sinai study found virtual urgent care algorithms outscored physicians for treatment appropriateness on common complaints, validating decision-support adoption. Preventive momentum creates spillover demand for chronic-condition screening and lifestyle coaching, elevating cross-sell potential within the urgent care center market size at both national and local levels.

The Urgent Care Center Market Report is Segmented by Service (Trauma/Injury Care, and More), Ownership (Corporate Chains, Hospital/Health-System Owned, Physician Group Owned, Other Ownerships), Age Group (Pediatrics 0-17 Yrs, Adults 18-64 Yrs, Geriatrics 65+ Yrs), and Geography (North America, Europe, Asia-Pacific, Middle East & Africa, South America). The Market Forecasts are Provided in Terms of Value (USD).

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## Geography Analysis

North America captured 48.32% of 2024 revenue, underpinned by insurance mechanisms that reimburse out-of-hospital encounters and by well-established clinic chains. Consolidators continue to target suburban infill opportunities while pivoting toward rural counties where 57 million residents remain underserved. CON reform across the Carolinas, plus Tennessee's phased deregulation, eases expansion and invites cross-state operator entries, fortifying the urgent care center market size within the region.

Asia-Pacific provides the sharpest 6.53% CAGR outlook. China's aging demographic, India's 275-million-plus eSanjeevani consultations, and Japan's robust telemedicine adoption validate urgent care viability. Public-private partnerships blend physical clinics with digital triage kiosks located in transit hubs, yielding high-volume low-acuity throughput models that mirror U.S. suburban prototypes.

Europe, Middle East & Africa, and South America log moderate growth. European universal-care systems restrict private pay volumes, yet cross-border telehealth and expatriate communities sustain niche demand. Gulf nations deploy urgent care inside medical-tourism corridors, while Brazil and Colombia flirt with hybrid ED-urgent models inside private hospitals. Currency volatility and regulatory opacity temper speed of scale-out but open localized franchise pathways for risk-tolerant investors.

### List of Companies Covered in this Report:

CVS Health / Select Medical / UnitedHealth Group (MedExpress) / HCA Healthcare (CareNow / CareSpot) / NextCare Holdings / GoHealth Urgent Care / CityMD / Summit Health / American Family Care / Carbon Health / Patient First / FastMed Urgent Care / Dignity Health (US HealthWorks) / Tenet Healthcare (United Surgical Partners) / Adeptus Health / Indigo Health (MultiCare) / Urgent Care Group / HealthBay (UAE) / Virgin Care (UK) /

### Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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