

The U.S. Market for Urgent Care Centers

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Abstracts

Urgent care centers in the United States provide an increasingly important option between a physician's office and a hospital emergency room. They provide walk-in, extended hour access for acute illness and injury care that is either beyond the scope or availability of the typical primary care practice. With a need to reduce emergency room visits and the influx of patients expected due to healthcare reform legislation, urgent care could play a decisive role in healthcare in the near future.

This report, The U.S. Market for Urgent Care Centers, represents Kalorama's analysis of the current market and future opportunity for urgent care centers. The report looks at center location growth, and the market for services performed by urgent care centers.

The report also looks at sales that suppliers may earn selling products to urgent care centers including the following:

Breakout of Urgent Care Revenues by Type (Cold/Flu, Infectious Disease, Laceration/Wound, Fracture Sprain, Pharmacy, Laboratory, Physical, Respiratory, Others)

IVD Sales to Urgent Care Centers

X-Ray Sales to Urgent Care Centers

Other Imaging Sales to Urgent Care Centers

Prescriptions Written by Urgent Care Centers

Vaccinations Performed by Urgent Care Centers

The urgent care business model involves providing a full range of services of non-emergency acute care. The model promises service and relies on a substantial investment in equipment and staff. Most have a physician on staff, generally more than one. UCC's differ from traditional Physicians' offices with procedure rooms for lacerations and fractures, radiology department for x-ray services, and a laboratory. While some traditional physician practices may have these facilities, it is more the exception. Convenient hours are a key strength of urgent care centers. Most urgent cares have hours at least as early as 8 a.m. but sometimes 7 a.m. and close at 8-10 p.m. at night.

In addition to market estimates and forecasts, the report provides the following:

Number of Centers Estimate and Growth Forecast, 2008-2016

Average Hours Opening and Closing

Staff at Urgent Care Centers

Ownership of Urgent Care Centers

Lab Complexity (No testing, CLIA-waived, CLIA-moderate, Fully Complex)

Age of Urgent Care Clinic

Drivers of Growth

Limitations and Challenges

Profiles of Representative Urgent Care Companies

Likely Effects of Healthcare Reform

3 Year Medical School, Mixed Urgent-Primaries, ER Costs and Other Trends

This report describes the Information for this report was gathered from a wide variety of published sources including company reports, catalogs, materials and public filings; government documents; trade journals; newspapers and business press; analysts' reports and other sources. Surveys of urgent care centers that have been published in

journals and government websites were an important part of visit and revenue analysis. Specific business plans and revenues of individual operators and chains in different areas of the United States were examined to determine trends.

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