

# RETAIL CLINIC ROOFTOPS RETREAT FROM 2023 PEAK

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Between May, 2023<sup>1</sup> and December, 2024, the number of retail-host clinics in the United States fell 21.7% from 1,750 to 1,370, according to data from National UC Realty. Not only did CVS, Walgreens, and Walmart announce significant clinic closures in 2024, there has been little to no growth among the remaining retail clinic operators.

The top 5 retail hosts make up 95% of in-store clinics nationally and only 2% of total clinics are in independent pharmacies and regional supermarket chains. Of the retail hosts, total penetration is only 4.3% of their total store counts, indicating in-store clinics failed to penetrate even their own footprints. Take out the 2 largest—CVS and Kroger—and penetration falls below 1%.

Although 18% of all in-store clinics have a hospital or health system

affiliation, taking out the 2 largest again makes the percentage with a hospital affiliation jump to 92%. For example, all 35 Target Clinics in California are operated by Kaiser Permanente. Walgreens has partnered with 12 different health systems for its remaining 162 sites. After closing over 50 of its own Walmart Health locations in 2024, the 5 remaining clinics in Walmart are all affiliated with health systems. Likewise, Hy-Vee, Meijer, Fruth and Publix all operate in affiliation with health systems.

## Reference

1. Ayers AA. 'Big retail' pivots are a retreat from 'on demand' care. *J Urgent Care Med.* 2023;17(9):30-35.

RETAIL CLINIC ROOFTOPS			
Rank	Retail Host	Clinic Count	Percent of Total
1	CVS Health	875	63.9%
2	Kroger Company	220	16.1%
3	Walgreen Company	162	11.8%
4	Target Corporation	35	2.6%
5	Hy-Vee, Inc.	23	1.7%
6	Meijer, Inc	12	0.9%
7	Fruth Pharmacy	7	0.5%
8	Albertsons Companies	7	0.5%
9	Walmart Stores, Inc.	5	0.4%
10	Publix Supermarkets	4	0.3%
Unclassified			
	Independent Pharmacies	11	0.8%
	Regional Grocery Chains	9	0.7%
Total		1,370	100.0%

Data as of December 13, 2024. Sources: National UC Realty, Respective retailer websites accessed 12/13/2024.



## Alan A. Ayers, MBA, MAcc

President of Experity Consulting and is Practice Management Editor of *The Journal of Urgent Care Medicine*

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