



# ASC Industry Overview

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**ASCData**  
by BH SALES GROUP

# What is an ASC?

Ambulatory Surgery Centers (ASCs) are highly regulated health care facilities that provide outpatient surgery and preventive care.

ASCs meet extensive state and federal requirements and are reviewed regularly to ensure safety and quality.

**More than 80% of surgeries are now performed in an outpatient setting.**

# Market Overview

## Why ASCs Are Different

ASCs perform a more narrow scope of procedures than hospitals and other healthcare facilities, which allows them to offer patients more specialized care. They also differ in ownership structure and day-to-day operations, making their needs and opportunities unique in the healthcare space.

**Understanding the nuances of the ASC market is key to working with these facilities effectively.**





# Market Overview

The current value of the ASC market is **\$45.6 billion**.<sup>1</sup>  
 There are currently **12,294 ASCs** in the US.<sup>2</sup>

Q2 2025

**6,504**

Medicare-Certified ASCs

Q2 2025

**5,790**

Non-Medicare-Certified ASCs

Q2 2025

**2.89**

Average # of ORs per  
 Medicare-Certified ASC

1 Source: Research And Markets, 2024 United States Ambulatory Surgery  
 Center Market Report

2 Source: ASC Data, Q2 2025 Report

## Ownership Structure

The majority of ASCs in the US are directly owned by the physicians who work there, but there is a growing number of corporate and hospital partnerships as well.

- 52% | Physician-Only
- 22% | Hospital-Physician
- 13% | Corporate-Physician
- 3% | Corporate-Physician-Hospital
- 3% | Corporate-Only
- 2% | Hospital-Only

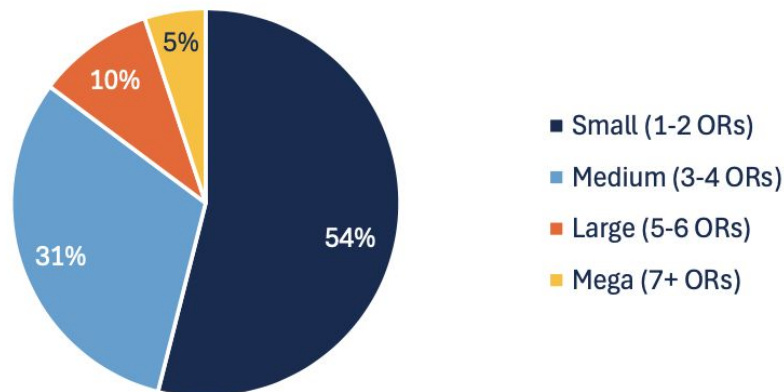


## ASCs by Size

The size of an ASC facility can be determined by the number of operating rooms it has.

### Average # of Operating Rooms per ASC

54%		1 - 2 ORs
31%		3 - 4 ORs
10%		5 - 6 ORs
5%		7+ ORs



## ASCs by Type

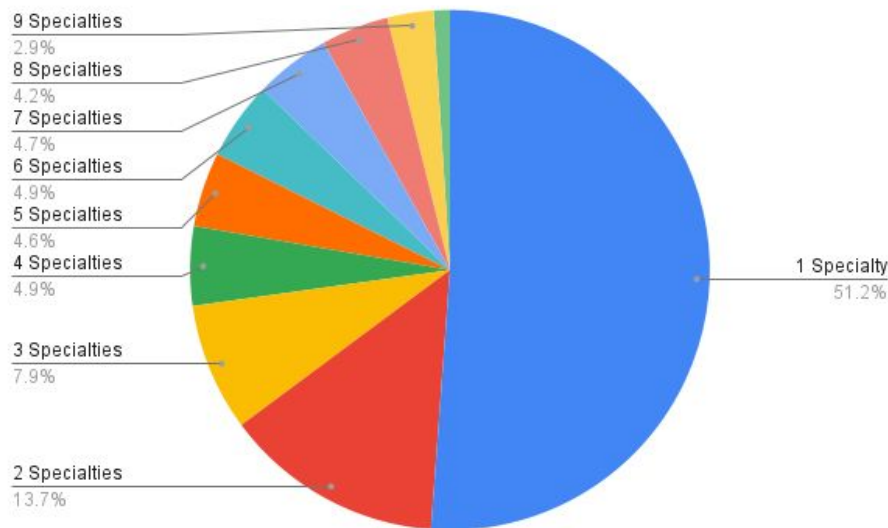
ASCs offer patients a more specialized surgical setting, with the majority of centers focusing on just one or two specialties.

### Single-Specialty vs. Multi-Specialty ASCs

51.2% | Single-Specialty ASCs

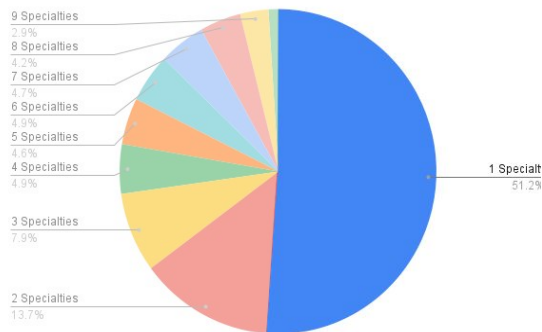
48.8% | Multi-Specialty ASCs

### Single-Specialty vs. Multi-Specialty ASCs



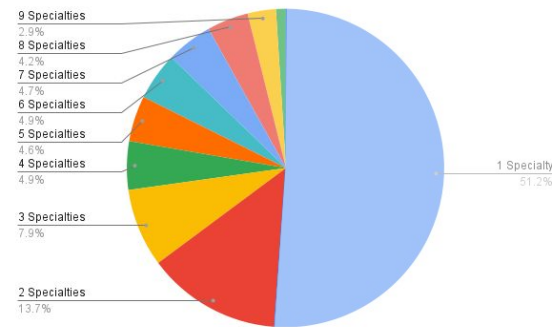
# ASCs by Type

## Single-Specialty



Total # of Single-Specialty ASCs: **3,328**  
Top Specialties: **Endoscopy, Ophthalmology**

## Multi-Specialty

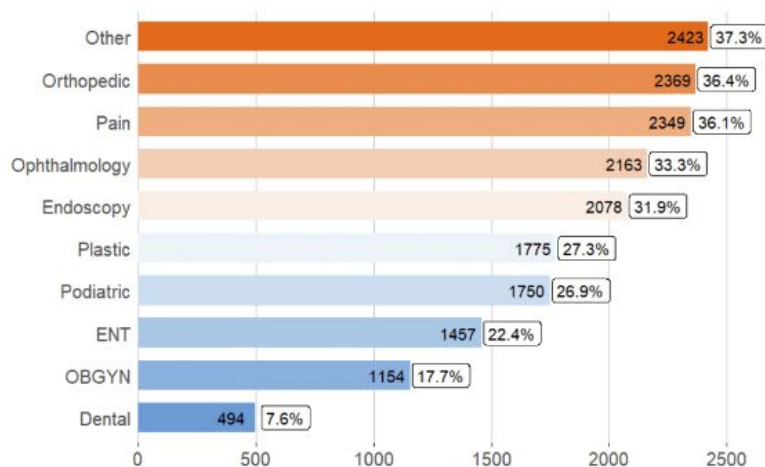


Total # of Multi-Specialty ASCs: **3,176**  
Top Specialties: **Orthopedic, Pain Management**



# ASCs by Type

Number of ASCs by Specialty Type



Note: Percentages will not add to 100 as some centers have more than once specialty.

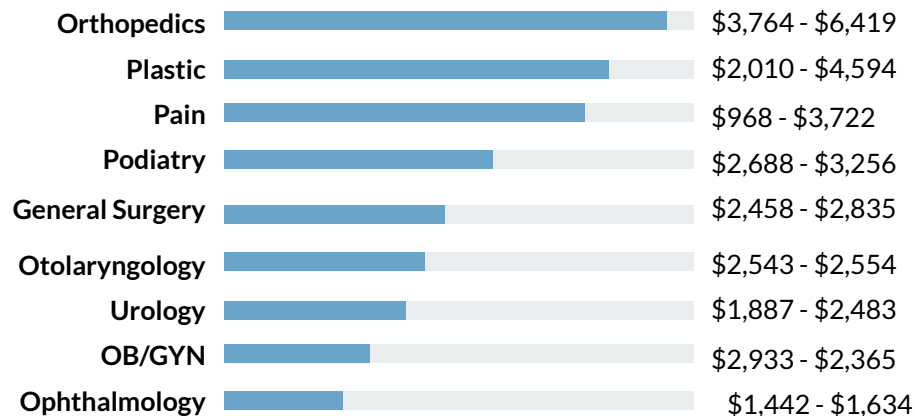
Top 3 Specialty Combinations per Total Number of Specialties Offered

1	Endoscopy	26%
	Ophthalmologic	25%
	Other	18%
2	Orthopedic   Pain	17%
	Endoscopy   Other	12%
	Ophthalmologic   Plastic	10%
3	Orthopedic   Pain   Podiatric	20%
	Orthopedic   Other   Pain	19%
	Endoscopy   Other   Pain	4%
4	Orthopedic   Other   Pain   Podiatric	16%
	Orthopedic   Pain   Plastic   Podiatric	6%
	ENT   Orthopedic   Pain   Podiatric	4%
5	Orthopedic   Other   Pain   Plastic   Podiatric	7%
	ENT   Orthopedic   Other   Pain   Podiatric	5%
	Endoscopy   Orthopedic   Other   Pain   Podiatric	3%

Note: "Other" typically represents General Surgery, Cardiology, Trauma, Neurosurgery, Vascular, Urology or Pediatrics.

# Average Case Revenue

By Specialty



Source: HSTPathways 2024 State of the Industry Report

Source: Surgical Information Systems "Ambulatory Surgery Center Statistics That Define the Industry"

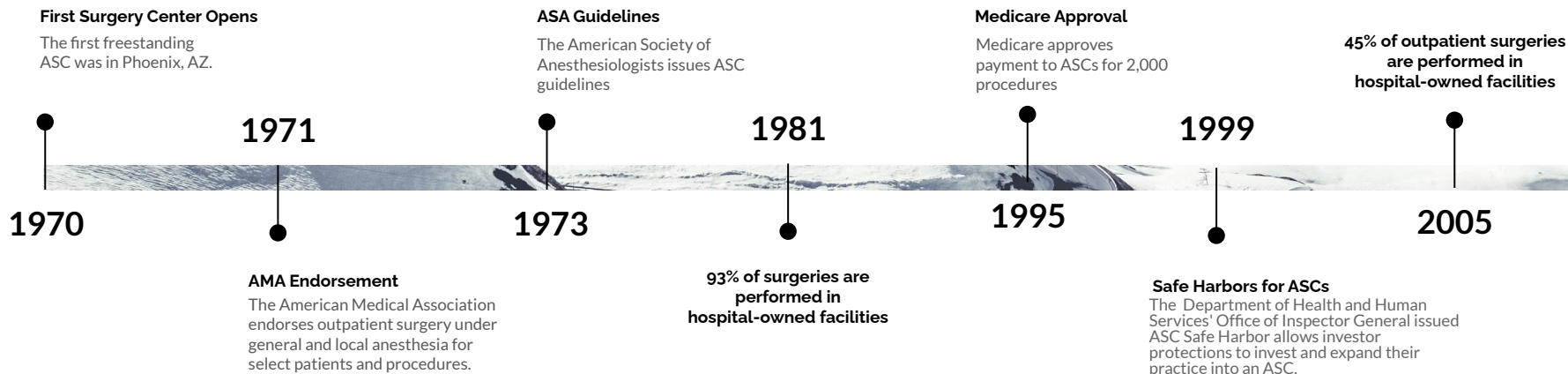
# Market Growth & Innovation

**ASCs have led innovations that have transformed outpatient surgery.**

New technology and techniques have made outpatient surgery safer and more comfortable, which has led to continued growth in the market.

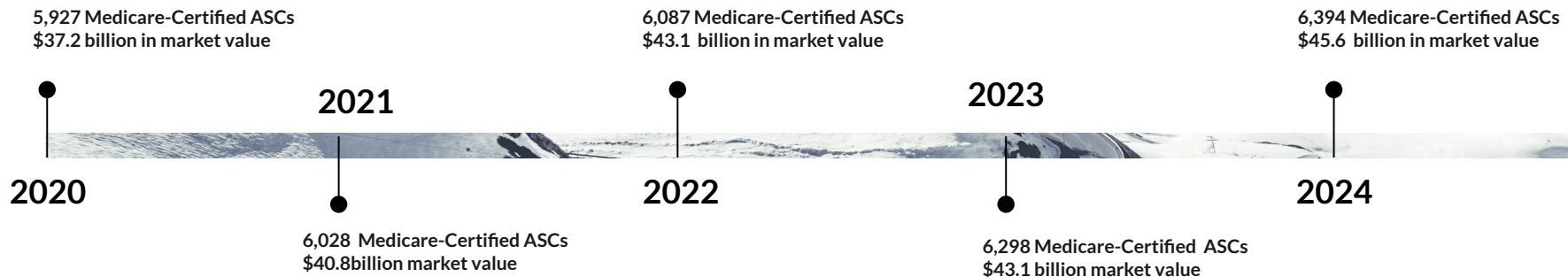
# A History of ASCs

Looking back at key moments in the evolution of the ASC market since the first center opened in 1970.



## Market Growth

The ASC market has experienced significant growth in recent years, thanks to technological innovation and regulation changes. Over the past decade, the number of Medicare-Certified ASCs has expanded by **25%**.



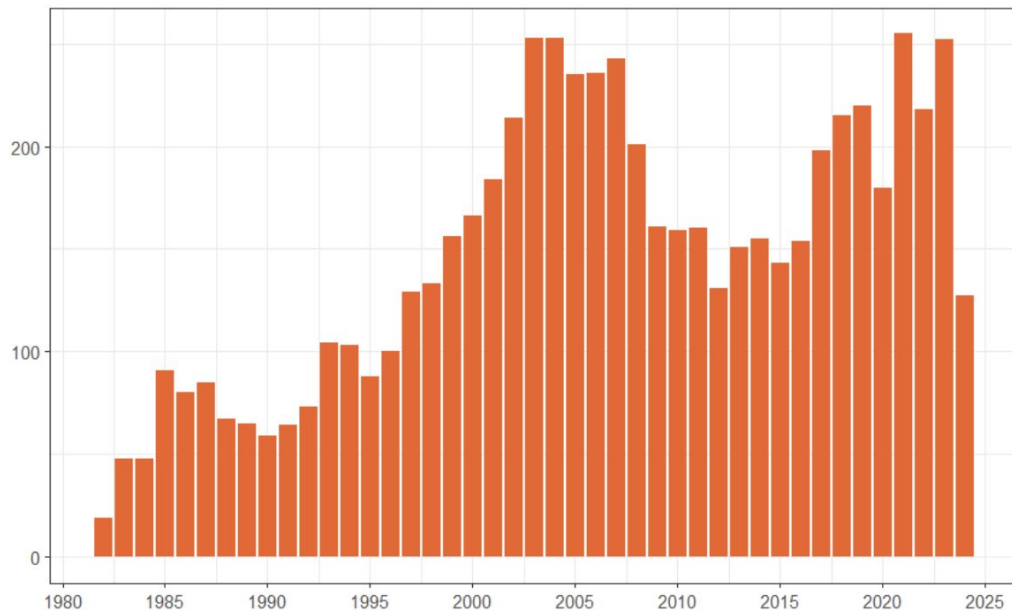
## Market Growth

More and more ASC facilities become Medicare-Certified each quarter, every year.

168 new ASCs were certified by the Centers for Medicare & Medicaid in 2024 — 1.6% annual net growth.

The total number of Medicare-Certified ASCs has increased by 20% since 2011.

Total Number of ASCs Certified by Medicare per Year



## Growing Demand For ASC Services

As America's baby boomers age, there is increasing demand for the services ASCs provide.

More than 49 million people, or **15%** of the U.S. population, are now 65 or older. The share of Americans 65 and older will grow to **24%** of the overall population by 2060.



# Most Common ASC Procedures

Cataract Surgery

Gallbladder Removal

Tonsillectomy

Endoscopy / Colonoscopy

Arthroscopic / Orthopedic Procedure





# Recently Added Procedures

In 2024, CMS approved 37 surgical procedures for the ASC setting, including:

- **23470** Reconstruct Shoulder Joint
- **27702** Reconstruct Ankle Joint
- **37192** Retrieval of Endovas Vena Cava Filter
- **60260** Excision Procedures on the Thyroid Gland

CMS approved 21 procedures for 2025, including:

- **0717T** Under ADRC Therapy for Rotator Cuff Tear
- **0795T** Under Permanent Dual-Chamber Leadless Pacemaker
- **D7251** Coronectomy — intentional partial tooth removal



# Fastest Growing Specialties

Specialties with the highest growth in 2024:

- Cardiovascular
- Pain
- Endoscopy

The specialties with the highest anticipated growth for 2025:

- Cardiovascular
- Orthopedic



# Lower Costs & Higher Value


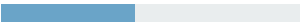
ASCs provide excellent value through high-quality outcomes and lower cost care. For many healthcare procedures, ASCs are the right choice for the right patients at the right price.

**ASCs reduce expenses for patients, insurers and Medicare.**

# Consumer Savings

Hospital Outpatient vs. ASC

## Average Cost Per Procedure

Hospital Outpatient Department		\$7,716
Ambulatory Surgery Center		\$3,157

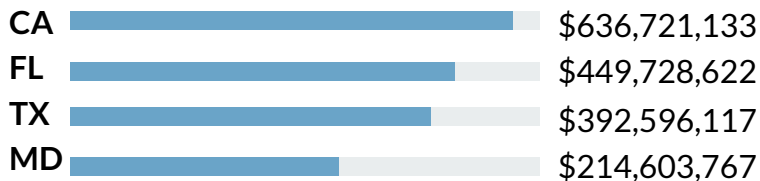
Facility fees are **\$3,077** higher at hospitals as compared to ASCs.

Shifting from a hospital outpatient department to a lower-cost ASC would save consumers **\$684** per procedure.

# Medicare Savings

By State

## States with the Highest ASC Medicare Savings



ASCs save Medicare **\$2.3 billion** each year.

## States with the Lowest ASC Medicare Savings



## Other Market Trends



### Advancements In Robotics

With manufacturers working to reduce the size of surgical robots, these advancements will allow smaller ASCs to accommodate more complex surgeries.

### Labor Pressure Relief

Though labor costs remain a key challenge, they had less of an impact over the past last year - which is helping to drive stronger financial performance across all healthcare sectors.



### Shifting Joint Venture Strategy

According to VMG, 63% of health system leaders see Outpatient Surgery as a potential area where they would consider a joint venture partner strategy.

## Other Market Trends

04



### Anesthesia Challenges

When it comes to anesthesia, many ASCs are facing increased costs and shifting provider models in the year ahead.

06



### Changing CON Laws

Revised certificate of need (CON) requirements and regulations has made it easier to expand an existing or establish a new ASC in many states. Legislation is pending in North Carolina, Georgia and Mississippi.

05



### Physician Reimbursement Cuts

While ASCs will see 2.9% increase in payments from CMS for covered procedures in 2025, the 2.9% cut to physician reimbursement may drive some physicians away from private practice.

# Looking Ahead To The Future

2024 - 2029

**21%**

Projected ASC Market  
Value Growth

2029

**\$55.3b**

Projected ASC Market Value





# How can I support the ASC industry?

1

Support the **Ambulatory Surgery Center Association** and the **ASC Quality Collaboration**. ASCA is the national association that represents ASCs and provides advocacy and educational resources to assist ASCs in delivering high quality, cost-effective ambulatory surgery to all the patients they serve. The ASC QC's mission is to advance patient safety and quality of care.

2

Help ASCA further connect with those who directly impact ASC legislation by contributing to the **ASCAPAC**.

3

Obtain and share quality, accurate data about the ASC industry solely from reputable sources.

# How can I market my products & services to the ASC industry?

1

**Network** at conferences such as ASCA, Becker's, CASA, TASCs and FSASC where you can connect with ASC professionals face-to-face

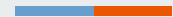
A full list of industry events is available at [ascdata.com](http://ascdata.com).

2

**Market** yourself, your company and your products/services with the resources ASC professionals turn to for accurate information to help run their facilities safely, efficiently and profitably.

3

**Lead** the market and set yourself apart from the competition when you share your team's knowledge of the ASC market in sponsored content, podcasts, and/or presentations.



# Thank you.

## Questions?

Contact us at [info@ascdata.org](mailto:info@ascdata.org)