
ASC Industry Overview

August 2025

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**.¹
There are currently **12,294 ASCs** in the US.²

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

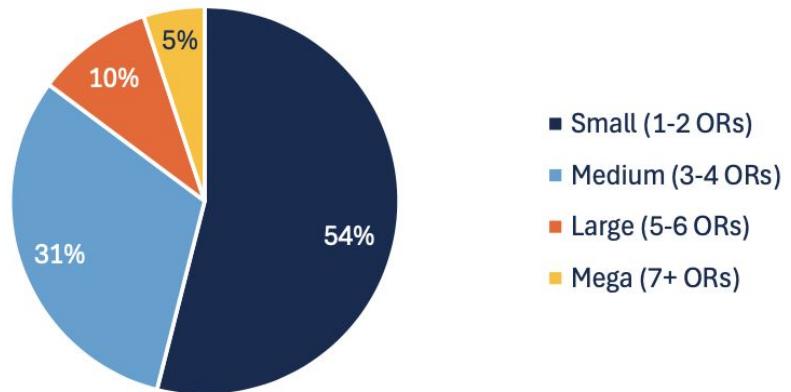


ASCs by Size

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

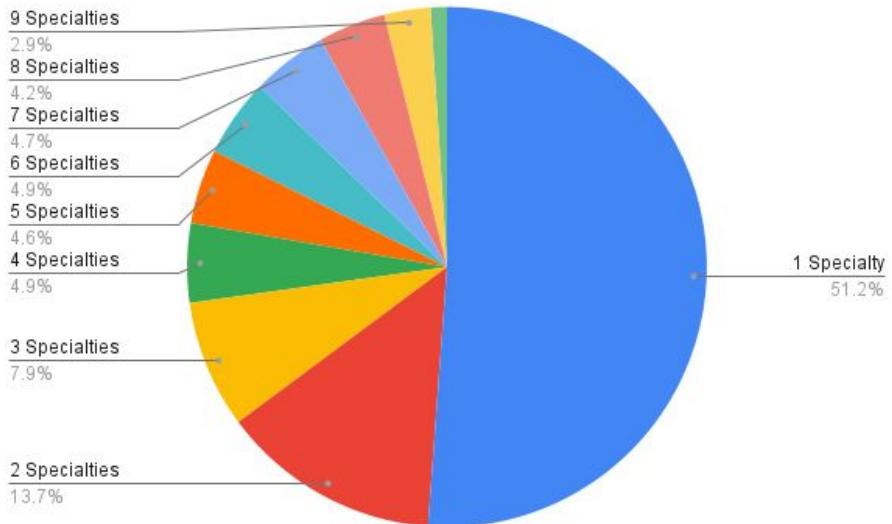
ASCs offer patients a more specialized surgical setting, with the majority of centers focusing on just one or two specialties.

Single-Specialty vs. Multi-Specialty ASCs

51.2% | Single-Specialty ASCs

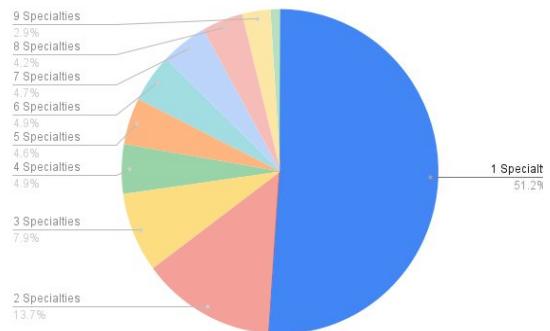
48.8% | Multi-Specialty ASCs

Single-Specialty vs. Multi-Specialty ASCs



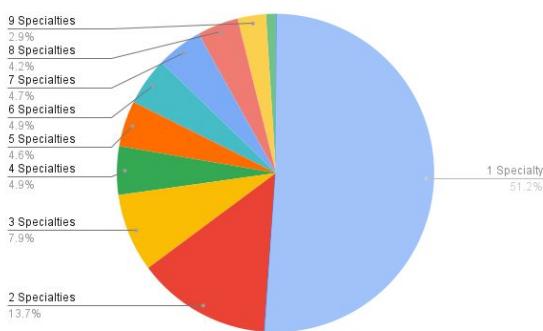
ASCs by Type

Single-Specialty



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

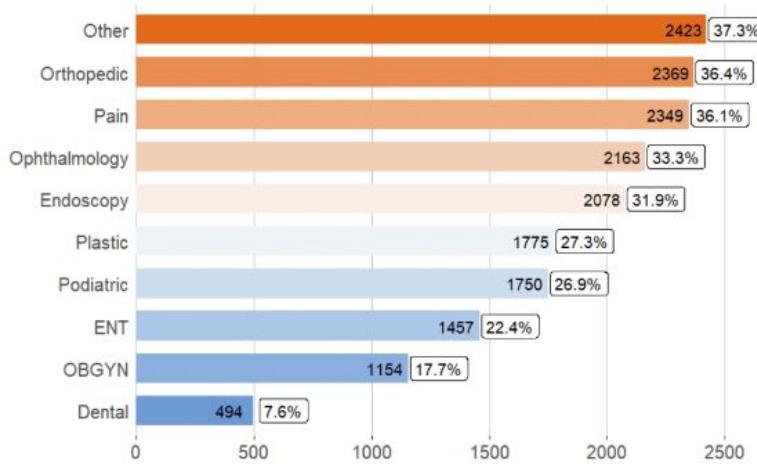
Multi-Specialty



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.

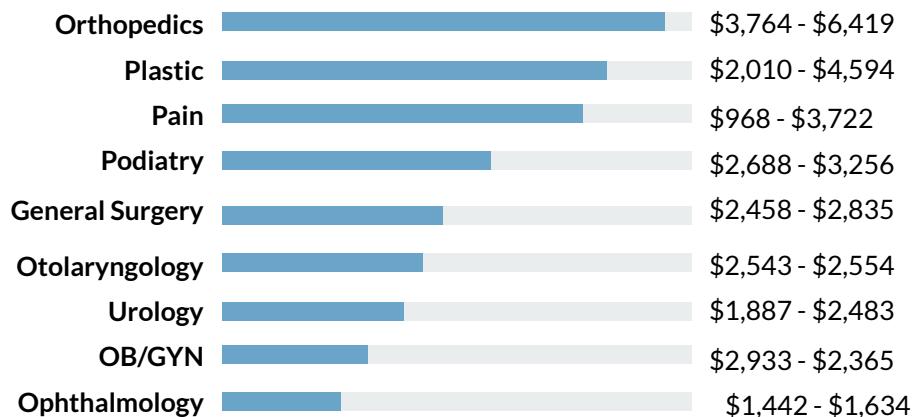
Top 3 Specialty Combinations per Total Number of Specialties Offered

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.

First Surgery Center Opens

The first freestanding ASC was in Phoenix, AZ.

1970

1971

ASA Guidelines

The American Society of Anesthesiologists issues ASC guidelines

1973

1981

Medicare Approval

Medicare approves payment to ASCs for 2,000 procedures

1995

1999

45% of outpatient surgeries are performed in hospital-owned facilities

2005

AMA Endorsement

The American Medical Association endorses outpatient surgery under general and local anesthesia for select patients and procedures.

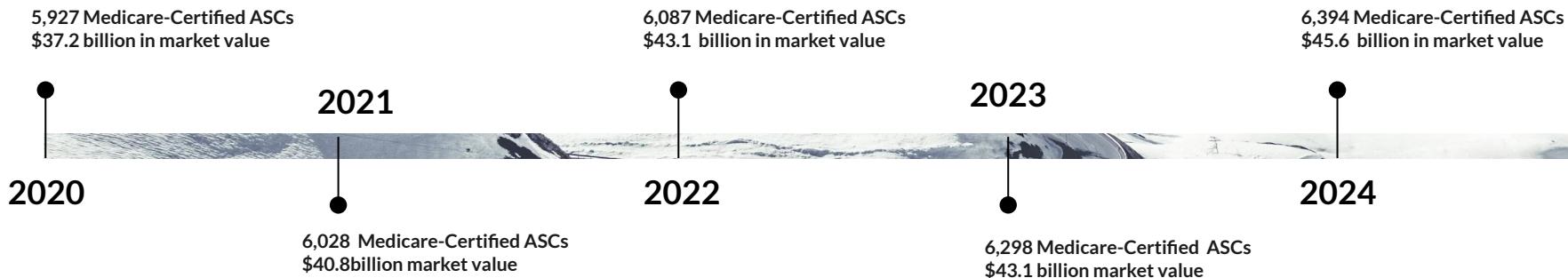
93% of surgeries are performed in hospital-owned facilities

Safe Harbors for ASCs

The Department of Health and Human Services' Office of Inspector General issued ASC Safe Harbor allows investor protections to invest and expand their practice into an ASC.

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%**.



Source: IBIS World. Ambulatory Surgery Centers. May 2022
Source: ASC Data, Q4 2024 Report

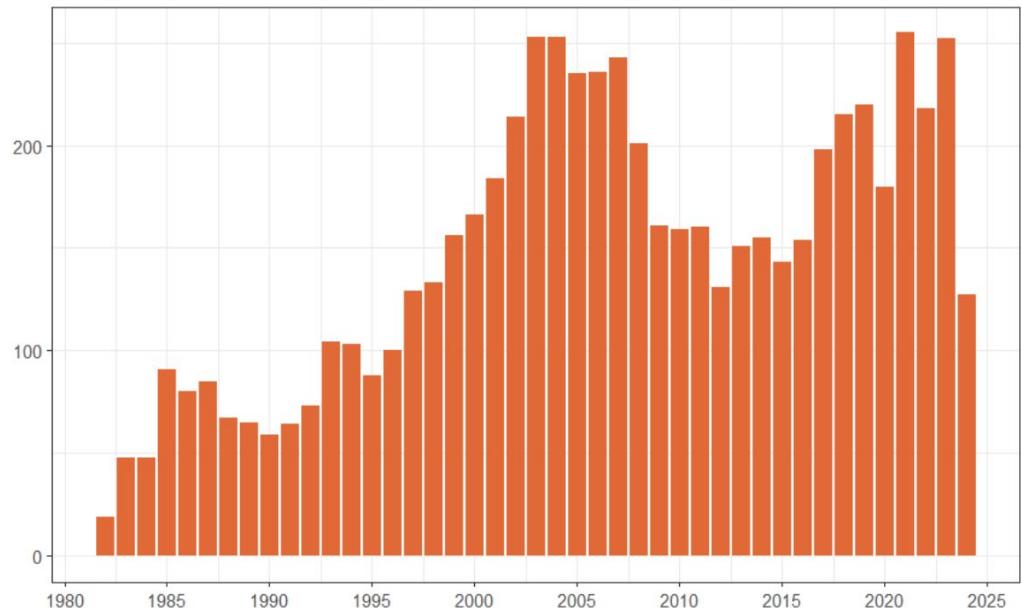
Market Growth

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



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.

Source: The American Journal of Managed Care November 2024, "Privately Negotiated Facility Fees at Ambulatory Surgery Centers and Hospitals"
Source: UnitedHealth Group, September 2021

Medicare Savings

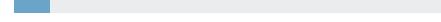
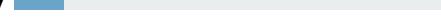
By State

States with the Highest ASC Medicare Savings

CA		\$636,721,133
FL		\$449,728,622
TX		\$392,596,117
MD		\$214,603,767

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

States with the Lowest ASC Medicare Savings

VT		\$3,505,222
WV		\$4,385,873
ME		\$9,593,767
ND		\$13,279,175

Other Market Trends



01 Advancements In Robotics

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

02 Labor Pressure Relief

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



03 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



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.

Anesthesia Challenges

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



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



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

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.
- 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