

# Shifting care from hospitals to ASCs

The healthcare ecosystem is constantly evolving. According to our healthcare commercial intelligence, more patients are receiving care at Ambulatory Surgery Centers (ASCs) than ever before, significantly impacting hospitals and their strategic decision making.



## ASC procedures are on the rise

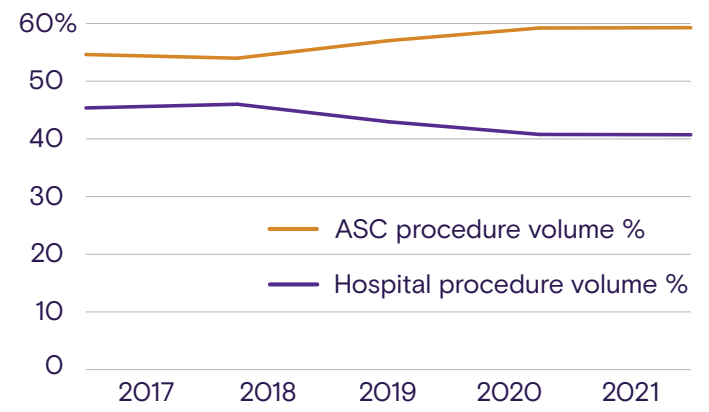
→ **2.2M**

Average ASC claims per month<sup>1</sup>

**47%**

Higher monthly average ASC procedures 2021 vs 2020<sup>1</sup>

### SHOULDER SURGERIES<sup>2</sup>



## Positive clinical outcomes

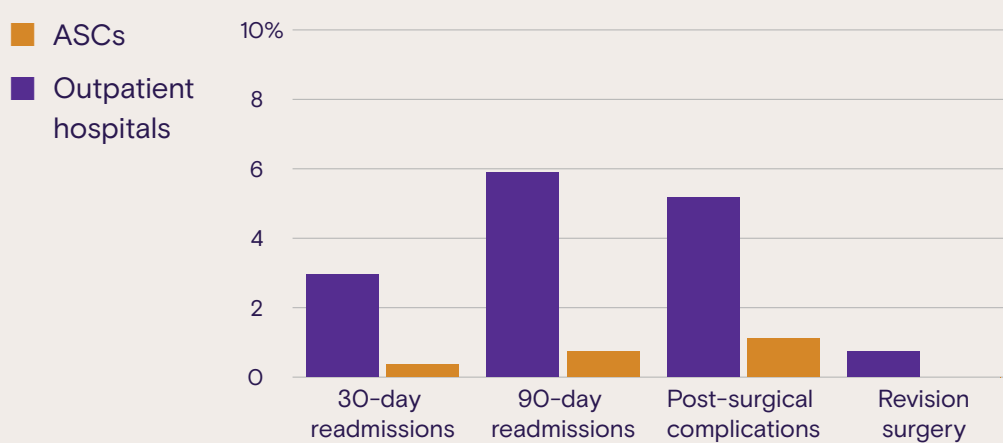
### TOTAL KNEE REPLACEMENTS<sup>3</sup>

Number of events (2014 - 2016)



### TOTAL HIP REPLACEMENTS<sup>3</sup>

Readmission and complication rate (2014 - 2016)



## Big cost savings

**\$38B**



overall reduction in healthcare costs due to ASCs<sup>4</sup>

**53%**



ASCs vs hospital outpatient reimbursement rate for the same procedure<sup>5</sup>

**\$5B**



of the savings are passed on to the patient<sup>4</sup>

## Increasing acquisition activity

→ **\$1.2B**

Acquisition of 92 ASCs by Tenet Healthcare/United States Surgical Partners<sup>6</sup>

**\$2.3B**

Acquisition of ASCs across 33 states by United Health/Optum<sup>7</sup>

1 Shifting care from hospitals to ambulatory surgery centers - a temporary fad or here to stay? | Definitive Healthcare (definitivehc.com)

2 Definitive Healthcare data on file

3 Patient Outcomes Following Total Joint Replacement Surgery: A Comparison of Hospitals and Ambulatory Surgery Centers (nih.gov)

4 <https://www.ascassociation.org/advancingsurgicalcare/reducinghealthcarecosts/privatepayerdata/healthcarebluebookstudy>

5 <https://www.beckersasc.com/asc-news/ascs-vs-hopds-12-insights-on-the-federal-reimbursement-gap.html>

6 <https://www.businesswire.com/news/home/2021108006134/en/Tenet-and-USPI-to-Acquire-SurgCenter-Development-and-Establish-Long-Term-Development-Partnership>

7 <https://www.wsj.com/articles/unitedhealths-optum-to-acquire-surgical-care-affiliates-for-2-3-billion-1483963436>

## What it all means

Understanding this market shift is important for anyone selling into the traditional hospital surgical setting. The data to support improved clinical outcomes and cost savings may continue to contribute to the rise in the popularity of ASCs. In response, savvy companies will adjust their sales and marketing strategies to more effectively target and expand into the ASC market. Healthcare commercial intelligence will be integral to these companies' efforts to understand these evolving industry trends and make more strategic decisions. For more detail and information, [read the full whitepaper](#).