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HEALTHCARE MARKET INSIGHTS

A Report That Strengthens Care Delivery

OCTOBER 2026



AMBULATORY SURGERY CENTERS

Market Growth, Workforce Pressures, and Operational Demands

TABLE OF CONTENTS

The ASC Landscape: Market Overview 4

ASC Ownership: Physician, Hospital, and Corporate Models 4

ASC Operations: Surgical Capacity and Specialty Mix 5

Outpatient Demand: Growth Projections and Market Drivers 6

Specialty Demand: Projected Growth Across Key ASC Service Lines 6

Regulatory Changes: The Impact of Federal Policy 6

Clinical Workforce Shortages: Implications for ASC Operations 7

Anesthesia Clinician Shortages: Effects on Surgical Capacity. 8

Building a More Flexible ASC Workforce Strategy 9

Locum Tenens: Supporting Capacity, Continuity, and Growth. 9

Stabilize Coverage: The Medicus Transition Program 10

Simplify Locum Tenens Management: MedicusOne 10

Build Recruitment Pipelines: Optimum Permanent Placement. 10

Conclusion 10

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A MEDICUS HEALTHCARE SOLUTIONS WHITE PAPER

AMBULATORY SURGERY CENTERS: MARKET GROWTH, WORKFORCE PRESSURES, AND OPERATIONAL DEMANDS

Ambulatory surgery centers (ASCs) remain one of the fastest-growing sites of care as more surgical procedures shift to outpatient settings. However, rising costs, physician shortages, and recruitment challenges are increasing pressure on ASCs to meet growing patient demand while maintaining timely access to surgical care.

80%+
of surgeries are now performed in an outpatient setting

Source: ASC Data

~90%
of ASCs have some degree of physician ownership

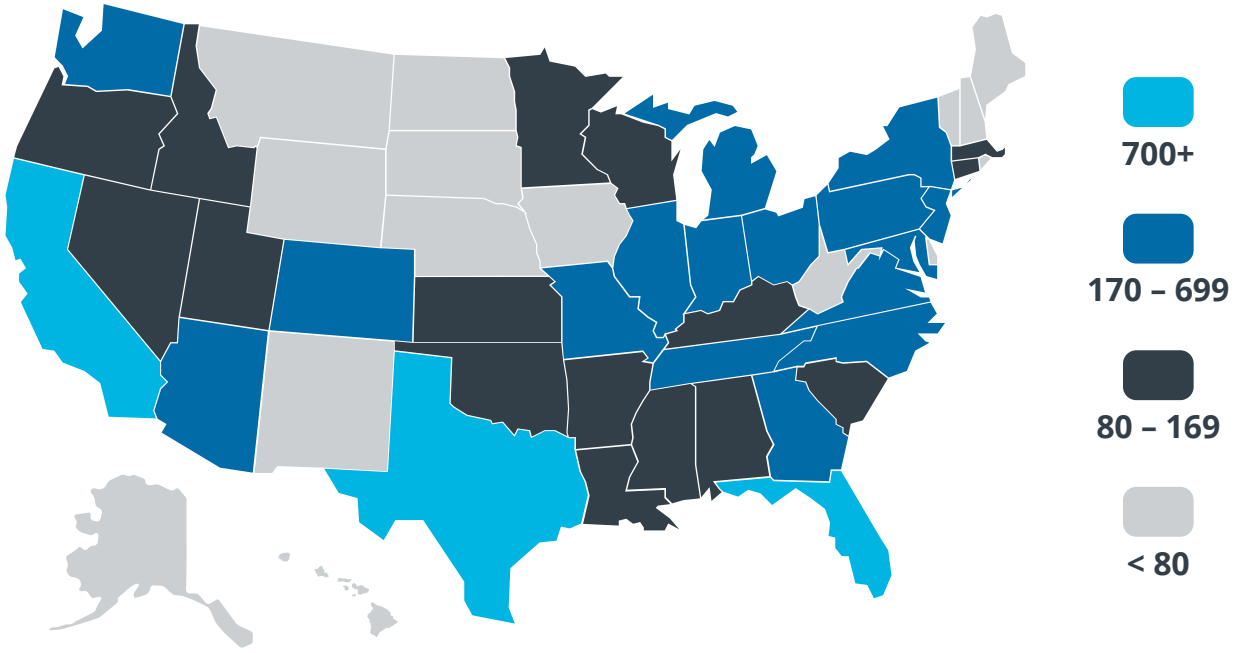
Source: ASC Data, August 2025

24%
ASC volume increase projected over the next decade

Source: Surgical Information Systems

Number of ASCs by State

Data shown for the 50 U.S. states only; U.S. territories are not included



Source: Medicus' proprietary data, October 2026

As the ASC landscape evolves, understanding the forces shaping the market will be essential to strengthen workforce planning, support operational performance, and sustain access to care.

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THE ASC LANDSCAPE: MARKET OVERVIEW

The U.S. ASC market continues to expand, with approximately 10,900 ASCs operating nationwide as of October 2026, according to Medicus' proprietary data. ASC concentration, however, varies considerably by state, with some markets more established than others.

States with the Highest Number of ASCs Per 100,000 People



States with the Lowest Number of ASCs Per 100,000 People

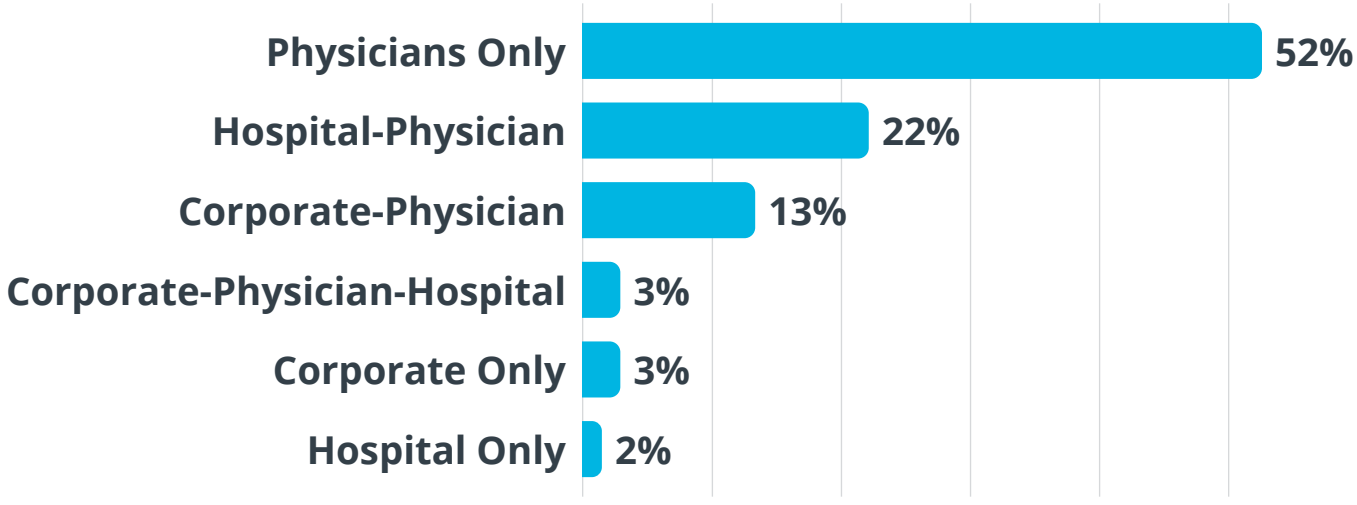


Sources: U.S. Census Bureau & Medicus' proprietary data. *Figures show ASCs per 100,000 residents, rounded to the nearest whole number, based on state population estimates and ASC counts as of October 2026.*

ASC OWNERSHIP: PHYSICIAN, HOSPITAL, AND CORPORATE MODELS

ASC ownership remains highly fragmented, with physicians maintaining a significant presence alongside health systems and corporate partners.

ASC Ownership Structure



Source: ASC Data, August 2025

As health systems and corporate partners expand their presence in the ASC market, joint ventures and acquisitions are creating new opportunities for collaboration, investment, and outpatient service line expansion.

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ASC OPERATIONS: SURGICAL CAPACITY AND SPECIALTY MIX

ASCs performed an estimated 28 million procedures over the last 12 months, according to Medicus' proprietary data. Supporting that volume are thousands of operating and procedure rooms that form the infrastructure for continued outpatient growth.

Operating Capacity in Medicare-Certified ASCs

18,657
operating rooms

1,606
procedure rooms

Source: ASC Data

The mix of specialties represented in ASCs offers a closer look at where outpatient surgical activity is concentrated. Procedure volumes vary across specialties, reflecting differences in the types of care delivered, patient demand, and how frequently services are performed in ambulatory settings.

Top Specialties by ASC Procedure Volume

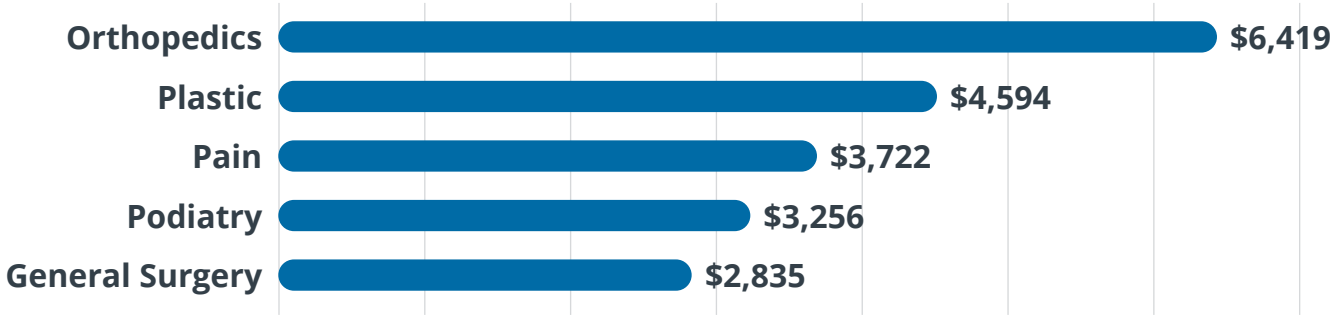
- Gastroenterology
- Ophthalmology
- Orthopedic Surgery
- Neurosurgery

Source: Medicus' proprietary data, past 12 months as of October 2026

Beyond established specialties, ASCs are expanding into additional areas of care. Cardiology, in particular, is emerging as a significant area of growth, with cardiovascular ASC volumes projected to grow 15% between 2023 and 2028, according to a study published in the *Journal of the American College of Cardiology (JACC)*.

Specialty mix also shapes the financial side of ASC operations, with average case revenue varying considerably from one specialty to the next.

Average Net Revenue per Case / By Specialty



Source: ASC Data, August 2025

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OUTPATIENT DEMAND: GROWTH PROJECTIONS AND MARKET DRIVERS

Specialty Demand: Projected Growth Across Key ASC Service Lines

Outpatient volumes are projected to increase 20% between 2026 and 2036, driven in part by the continued migration of care to ambulatory care settings.

Projected Outpatient Growth in Key ASC Service Lines, 2026–2036

29%	19%	17%
Cardiovascular *cardiology & vascular*	**Surgery** *general surgery, ophthalmology, ENT, & urology*	**Orthopedics & Spine**

Source: Vizient | Kaufman Hall

Key Drivers of Outpatient Growth



Aging Population



Rising Chronic Disease



Policy Expansion & Care Redesign



Cost Savings

Demographic, clinical, and policy trends all point to sustained growth in procedural demand across ambulatory settings in the years ahead.

Regulatory Changes: The Impact of Federal Policy

Federal policy continues to widen the range of procedures ASCs can perform. CMS's 2026 final rule revised the ASC Covered Procedures List criteria and began a three-year phase-out of Medicare's inpatient-only list, one of the largest single-year expansions of outpatient-eligible surgery in recent years.

573 codes added to the ASC Covered Procedures List in 2026. That momentum is set to continue well into next year under CMS's 2027 proposed rule.

Proposed ASC Expansion, 2027



618 codes
proposed for addition to the ASC Covered Procedures List



637 procedures
proposed for removal from Medicare's inpatient-only list

Source: ASCA

As the scope of outpatient-eligible procedures expands, the line between hospital-based and ASCs continues to evolve, reshaping where surgical services can be delivered.

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CLINICAL WORKFORCE SHORTAGES: IMPLICATIONS FOR ASC OPERATIONS

As procedures continue to shift into outpatient settings, the supply of clinicians needed to staff ASCs is not keeping pace. National workforce projections point to clinician shortages across several specialties that contribute to ASC case volume.

Projected Workforce Shortages Across Key ASC Specialties, 2027

- **Dentists*** **-7,940 FTEs**
- **Ophthalmology** **-2,960 FTEs**
- **Anesthesiology** **-4,780 FTEs**
- **General Surgery** **-2,370 FTEs**
- **Cardiology** **-3,710 FTEs**
- **Orthopedic Surgery** **-2,090 FTEs**
- **OB/GYN** **-3,650 FTEs**
- **Gastroenterology** **-640 FTEs**

**Dentists include general dentists, oral surgeons, endodontists, and periodontists*

Source: National Center for Health Workforce Analysis (NCHWA)

The pressure is already showing at the leadership level, where physician recruitment and retention ranked among the top operational concerns for 2026.

37% **of ASC leaders surveyed expected physician recruitment and retention to be a top operational challenge in 2026**

Source: VMG Health

Workforce shortages extend beyond physicians to the support staff ASCs rely on. Surgical technologists and radiologic technologists and technicians, for example, are each projected to see a shortfall of more than 3,000 FTEs in 2027. Staffing pressures across multiple specialties and roles could limit ASCs' ability to operate at full capacity.

"When workforce pressure extends across multiple specialties, filling the next opening only solves part of the challenge. For ASCs, the bigger opportunity is building enough flexibility into the workforce model to protect case volume, support surgical capacity, and maintain patient access as demand evolves."

Bob Dickey, Chief Executive Officer at Medicus



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Anesthesia Clinician Shortages: Effects on Surgical Capacity

Among the clinical workforce challenges facing ASCs, anesthesia shortages present a particularly significant operational risk. Since anesthesia services support a large share of ASC procedures, shortages of anesthesiologists and CRNAs threaten an ASC's ability to keep schedules full and rooms running.

A Snapshot of the Anesthesia Clinician Shortage, 2027

-4,780 FTEs
anesthesiologists

-3,280 FTEs
CRNA shortage in metro areas

Source: National Center for Health Workforce Analysis (NCHWA)

Unlike shortages within individual specialties, insufficient anesthesia coverage can affect multiple service lines simultaneously, extending the consequences of workforce gaps across the ASC.

Operational Impacts of Anesthesia Staffing Shortages on ASCs

- **Canceled Procedures**
- **Delayed Patient Care**
- **Reduced Surgical Case Volumes**
- **Underutilized Operating & Procedure Rooms**
- **Lost Revenue**



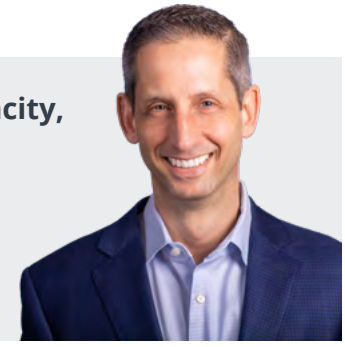
Anesthesia Coverage Is a Top Financial Concern:

67% of ASC leaders ranked anesthesia coverage among their top three financial challenges for 2026, while the share expecting to pay anesthesia stipends rose from 28% to 44% in a single year.

Source: VMG Health

"Anesthesia shortages can create a ripple effect across surgical capacity, utilization, and financial performance. We work with clients to build more resilient coverage models that reduce risk, protect revenue-generating capacity, and give leaders the flexibility to respond as demand changes."

Grant Smith, Chief Revenue Officer at Medicus



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BUILDING A MORE FLEXIBLE ASC WORKFORCE STRATEGY

Locum Tenens: Supporting Capacity, Continuity, and Growth

As physician shortages continue to challenge ASC leaders, flexible staffing models can provide another lever for maintaining capacity and responding to evolving workforce needs. Locum tenens can help ASCs address coverage gaps, maintain surgical capacity, and adapt their workforce as patient demand and service lines evolve.

Key Benefits of Locum Tenens for ASCs

- **Maintain Surgical Capacity**
- **Support Service Line Growth**
- **Bridge Recruitment Gaps**
- **Adapt to Fluctuating Patient Demand**
- **Protect Revenue**

Case Study: Keeping ASCs Running Through a Health System Anesthesia Staffing Transition

When its outsourced anesthesia group submitted a 180-day notice, a Michigan health system needed to maintain coverage across 14 sites, including four ASCs, while transitioning to an employed anesthesia model.

Delivery

- **High-quality anesthesiologists & CRNAs**
- **Reliable coverage**

Impact

- **4 ASCs supported**
- **Uninterrupted access to outpatient surgery**

"Moving from a long-standing outsourced group to an employed model was new territory for us. Having worked with the Medicus Transition Program in radiology, we knew they were the right partner to help maintain patient care and bring our anesthesia program in-house. Medicus guided us through the process, answered every question, and built relationships that made the transition feel manageable. Their credentialing team sets a high standard, and their support helped us keep every site running without skipping a beat." - Health System Leadership

View the complete case study

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Stabilize Coverage: The Medicus Transition Program

The Medicus Transition Program helps healthcare organizations and groups maintain clinical coverage and workforce stability during periods of transition, growth, or sustained shortages.

THE MEDICUS TRANSITION PROGRAM

Your bridge to clinical workforce stabilization

The Medicus Transition Program Helps Address

- Capable of launching in as little as **30 days**
- Project team of **2-100+ FTEs**
- **>95%** fill ratio

Simplify Locum Tenens Management: MedicusOne

Managing locum tenens staffing across multiple vendors, departments, and systems can create unnecessary complexity and limit visibility. MedicusOne brings staffing operations under one accountable model, helping ASC leaders streamline coverage management, improve cost control, and support consistent access to quality clinicians.

medicusOne

One Platform, One Partner, Simplified Locums Management

Centralize locum tenens staffing through one accountable VMS/MSP platform

- **Faster access to quality talent**
- **Concierge-level credentialing**
- **Coverage & scheduling accountability**

Build Recruitment Pipelines: Optimum Permanent Placement

As ASCs plan for continued growth, long-term recruitment is essential to maintaining clinical capacity and supporting expanding services. Optimum Permanent Placement Services helps ASCs build tailored clinician recruitment pipelines that align with their workforce needs, supporting sustainable staffing and long-term growth.

OPTIMUM
Permanent Placement Services

- ✓ **100% contingency-based firm**
- ✓ **One point of contact**
- ✓ **90-day guarantee with no upfront costs**

CONCLUSION

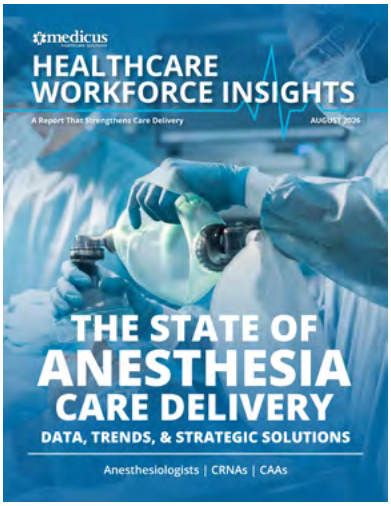
The next phase of outpatient care will create new opportunities for ASCs to expand services, reach more patients, and strengthen their role in healthcare delivery. Realizing that potential will require more than responding to rising demand. ASC leaders will need workforce strategies that align clinical coverage with surgical capacity, service line growth, and long-term operational goals.

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SPECIALTY-SPECIFIC WORKFORCE REPORTS

For a more comprehensive look at the workforce challenges facing key ASC specialties, explore our reports examining physician shortages, the factors driving demand, and the strategies healthcare leaders can leverage to strengthen clinical coverage and maintain patient access.

Anesthesiology



View Here

Surgery



View Here

Gastroenterology



View Here

Cardiology



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OB/GYN



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Radiology



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