

Ambulatory Services Market Assessment, By Service Type [Diagnostics, Wellness Clinics, Observation and Consultation, Treatment Centers, Rehabilitation Services], By Department [Primary Care Offices, Outpatient Departments, Emergency Departments, Surgical Specialty, Medical Specialty], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global Ambulatory Services Market size was valued at USD 3.96 billion in 2023, expected to reach USD 6.36 billion in 2031 with a CAGR of 6.1% for the forecast period between 2024 and 2031F. Growth in the global ambulatory services market is driven by various factors such as the rising prevalence of chronic diseases, increase in the elderly population, technological advancements, increased healthcare expenditure, government initiatives, policies, and programs. Increase private and public sector investments in healthcare services, including ambulatory services, the presence of several top players, and developmental strategies like mergers, acquisitions, and collaborations accelerate the global ambulatory services market growth.

The global ambulatory services market is further undergoing robust growth due to the rise in the prevalence of chronic diseases at the global level. An increase in the elderly population is one of the most common risk factors for this high prevalence, as elderly people are more prone to get diseases and are more likely to go for ambulatory services as they are cost-effective, less crowded with less waiting time, and provide efficient medical treatment. By providing patients with improved access to healthcare services, reduced risk of infection, and faster recovery times, ambulatory healthcare services are helping to improve the overall quality of healthcare and enhance the patient experience. These benefits of ambulatory services are further accelerating growth in the global ambulatory services market.

Increased healthcare expenditure and governmental support by initiating policies and programs to launch more and more ambulatory services centers in different locations to improve healthcare accessibility and provide quality medical treatment to patients play a very crucial role in enhancing the growth of the global ambulatory services market. Collaborations, mergers,

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acquisitions among public and private companies, and technological advancements are driving factors for the growth in this market. Moreover, there has been a rise in awareness among the population regarding the potential of ambulatory services in getting the best medical treatment, which further propels the global ambulatory services market.

Increased Prevalence of Chronic Diseases

The increasing prevalence of chronic diseases is a major driving factor for the global ambulatory services market. With increased accessibility to healthcare services, people are living longer lives, which has simultaneously increased the burden of chronic diseases such as cardiovascular diseases, cancer, diabetes, and respiratory illnesses. According to WHO, chronic diseases are responsible for 41 million deaths every year at the global level. This affects people of all age groups, irrespective of their region and country. Unhealthy diet, sedentary lifestyle, tobacco use, and alcohol abuse are the leading risk factors for the rising chronic diseases in developing as well as developed countries. This increasing prevalence is further propelling the demand for establishing more ambulatory service providers to meet the healthcare demands of diseased people. To achieve the goal of a healthier future, healthcare providers are joining hands and getting into partnerships and collaborations to provide top-quality medical treatment to patients. This has further fuelled the global ambulatory services market.

Technological Advancement

Another key driver is the rapid advancement in medical technologies, which is expanding the capabilities of ambulatory services. Additionally, innovations in diagnostics, minimally invasive procedures, integrating AI within the healthcare system and telehealth enable ambulatory service centers to offer a broader range of services. These technological advancements enhance the efficiency and effectiveness of treatments and improve patient experiences by minimizing recovery times and increasing the convenience of receiving care. Therefore, this is positively influencing the market. With the increasing usage of AI in ambulatory services, companies can provide effective outcomes by saving ample amounts of time; due to this, many healthcare providers are using AI within their systems. For instance, in August 2023, HCA Healthcare, Inc., which is a pioneer in providing ambulatory services, announced a collaboration with Google cloud to use generative AI technology in improving workflows, save time on managing essential medical documentation work such as clinical documentation, and let physicians and nurses focus on providing medical treatment to the patients.

Government Initiatives

Ambulatory services improve treatment outcomes in patients by providing medical services such as early detection and diagnosis, consultations, patient counseling, preventive care, and complete medical treatment of diseases. Patients can schedule appointments conveniently and receive treatment without spending time in the hospital. Ambulatory services are cost-effective, less crowded, provide faster recovery, and are more accessible compared to hospitals. Due to these benefits, governments have initiated several policies and programs emphasizing the importance of establishing ambulatory services to help and support the global ambulatory services market. For instance, in May 2023, Newfoundland and Labrador Health Services, the Government of Canada, requested proposals to establish an ambulatory care center in the Northeast Avalon to improve health services accessibility for the population and build a strong healthcare system. This new ambulatory care center would help patients to get quality medical services. These initiatives by the government further accelerate the growth of the global ambulatory services market.

Growing Demand for Primary Care Offices

Primary care offices hold the largest segmental share in the ambulatory services market, as they are crucial in providing comprehensive and continuous patient care. This segment involves services such as routine check-ups, disease management, patient counseling, and advocacy, as well as preventive care. The huge demand for primary care offices in the market can be attributed to their pivotal role in providing a patient-centered approach and various healthcare facilities and services. Many companies are entering the industry of providing primary care office facilities through mergers, acquisitions, and partnerships. For instance, in July 2022, Amazon announced the acquisition of One Medical, a patient-centered, technology-powered national primary care organization that provides affordable and quality care to patients. This acquisition would enable the patients to get consultations, diagnostic tests, chronic disease management, and overall primary care facilities with the help of a technology-powered model. Due to these innovative healthcare delivery approaches, global ambulatory services market is growing exponentially.

North America Holds the Largest Share

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North American region holds the largest share of the global ambulatory services market. The United States is well-known for its robust healthcare infrastructure and world-class healthcare facilities. To improve accessibility to the healthcare systems, the US has several ambulatory services centers. There is increased awareness among the general population regarding the benefits of ambulatory services, which has raised the demand among patients to receive quality care. For instance, according to an article published in October 2023, surgical procedures within the United States are increasingly shifting to outpatient or non-hospital locations such as ambulatory service centers. It is expected that 144 million ambulatory surgeries will be performed in 2023. This patient shift from hospital to ambulatory services is driving the growth of the global ambulatory services market. Moreover, the presence of key market players of ambulatory services providers in the region, such as HCA Healthcare and Medical Facilities Corporation, is pivotal in promoting growth in the global ambulatory services market.

Future Market Scenario

Global ambulatory services market is expected to grow tremendously in the coming years, due to multiple factors such as increasing prevalence of chronic diseases, such as cancer, cardiovascular diseases, etc. Increase in aging population leads to development of chronic diseases, this poses a need to undergo ambulatory services including diagnosis, rehabilitation services and increased number of ambulatory surgeries, globally. Technological advancements, increased awareness regarding the benefits of ambulatory services to manage several diseases, governmental initiatives, policies, and programs to establish more ambulatory care centers within the countries to improve ambulatory care services and accessibility, increased investments by healthcare industry and collaborative ventures involving medical devices manufacturers, diagnostic labs, research institutions, and other relatable private firms have spurred innovation leading to further growth of the global ambulatory services market.

Key Players Landscape and Outlook

In the ambulatory services industry, several healthcare organizations establish strategic partnerships and distribution agreements to empower and strengthen each other’s resources and gain insights regarding new markets. This further propels the global ambulatory services market expansion. These mergers and acquisitions and initiatives promote innovation in the healthcare industry, enhance expertise, improve the population's health condition and lead to the robust growth of the ambulatory services market. Many big healthcare services providers are undergoing strategic mergers and acquisitions and partnerships to enhance and strengthen their services. For example, on May 2023, HCA Healthcare Inc. announced an agreement to purchase 41 urgent care centers in Texas from FastMed, excluding centers outside Texas. The expansion would help HCA Healthcare Inc, to provide efficient outpatient care facilities whenever needed and broaden the company’s healthcare network.

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