

# United States Freestanding Emergency Department - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The United States Freestanding Emergency Department Market size is estimated at USD 12.10 billion in 2024, and is expected to reach USD 15.20 billion by 2029, growing at a CAGR of 4.68% during the forecast period (2024-2029).

The factors that have been driving the market growth over the years include a growing number of consumer-driven health plans, federal funding, and the rising preference for convenience care. For instance, in June 2022, the US Department of Health and Human Services (HHS) approved Colorado's Section 1332 State Innovation Waiver amendment request. Approximately 10,000 Americans had access to more affordable coverage due to the implementation of the Colorado Option in 2023. According to the data published by the Centre of Medicare and Medicaid Center in January 2024, consumers have increased choice in product offerings in 2023, given increased insurer participation and increased plans offered by participating insurers. National insurers are offering more competitively priced silver-level plans than consumer-driven health plans. They currently provide the lowest-price silver option available to 20% of consumers, up from 6% in 2022. Therefore, the companies' growing number of consumer-driven health plans is expected to drive market growth over the forecast period.

The US government provides various funding opportunities that support and provide financial help to hospitals to promote freestanding emergency departments, elevating the market growth over the forecast period. For instance, in March 2023, the US Department of Homeland Security (DHS) allocated USD 89.14 billion through the Federal Emergency Management Agency (FEMA) to enhance emergency management and preparedness capabilities. These funds will go toward adaptable, sustainable, secure, strategically situated, and fully interoperable Emergency Operations Centers

(EOC), addressing identified flaws and needs.

The growing number and popularity of freestanding emergency departments among patients is also expected to drive the market growth over the forecast period. For instance, according to an article published in the journal of the Decision Science Institute in January 2022, the number of freestanding emergency departments (FSEDs) has been proliferating in the United States. Proponents of FSEDs cite potential benefits of FSEDs, including lower waiting time and reduced travel distance for needed emergency care. Thus, the growing number of freestanding emergency departments (FSEDs) is expected to boost the market growth over the forecast period.

However, previous studies on emergency care access and expenditure indicate that higher access may lead to higher utilization of healthcare services, which is expected to lead to an increase in overall healthcare costs as these services are costly; hence, the expenditure will increase

### United States Freestanding Emergency Department Market Trends

#### Hospital Affiliated is Expected to Hold Significant Market Share in the Ownership Type Segment

Hospital-based freestanding emergency departments are a new and evolving care delivery model. These departments across the country may be owned and run by a hospital (under the name "hospital outpatient department" or HOPD). FSEDs are equipped to provide a wide range of emergency medical services, including evaluation, diagnosis, treatment, stabilization, and management of acute medical conditions and injuries. They may have advanced imaging capabilities, laboratory services, pharmacy services, and access to specialists for consultation or transfer as needed.

Factors such as hospital emergency department overcrowding, an increase in the number of trauma cases, and an increase in the prevalence of stroke and other neurological illnesses that require prompt attention are also contributing to the increase in segment growth.

The presence of a new FSED provides additional access points for emergency medical services in the community. This increased accessibility attracts patients who may prefer the convenience and proximity of the FSED for urgent care needs. Thus, the demand for FSED services is growing. For instance, in February 2024, HCA Florida Osceola Hospital, an affiliate of HCA Florida Healthcare, established a freestanding emergency

room, HCA Florida Osceola East Emergency. The facility invests USD 15.5 million to offer emergency care for adults and children.

Thus, the overcrowding of hospitals, the increasing trauma cases in the country, and the growing utilization of these centers are expected to boost the segment growth over the forecast period.

### Emergency Care and Other Services is Expected to Hold Significant Market Share in the Service Segment

Emergency care includes traumatic injuries, such as fractures, lacerations, and burns, acute medical conditions, such as chest pain, shortness of breath, and seizures, respiratory emergencies, like asthma attacks and respiratory distress, and neurological emergencies, such as strokes and head injuries. Cardiac emergencies, including heart attacks and arrhythmias, abdominal emergencies, like appendicitis, and gastrointestinal bleeding. The other services include pediatric, obstetrics, critical care, and emergency treatment and procedures.

The growing number of accidental and sports injuries requiring immediate treatment is likely to contribute to the segment's growth. For instance, according to the Accident Statistics report updated by LegalMatch in August 2022, injuries to the anterior cruciate ligament (ACL) occur roughly 150,000 times every year in the United States. Female basketball and soccer players had an ACL injury 2 to 8 times more frequently than other athletes. Therefore, the growing number of injuries increases the freestanding emergency care units, boosting the segment growth.

The growing burden of heart diseases requiring immediate attention is likely to boost the demand for FSED emergency care services. For instance, the Centers for Disease Control and Prevention report published in May 2023 predicts that 12.1 million people in the United States will have AFib by 2030. FSEDs are equipped to quickly assess and diagnose cardiac emergencies, such as heart attacks (myocardial infarctions), arrhythmias, and other cardiac conditions. This allows healthcare providers to detect changes or abnormalities in cardiac function and respond promptly with appropriate interventions, thus contributing to the segment growth.

## United States Freestanding Emergency Department Industry Overview

The US freestanding emergency department market is highly competitive and consists of a number of major players. Companies like Adeptus Health Inc., Advis, Ascension Health, EMERUS, Lifepoint Health Inc., Tenet Healthcare Corporation, and Universal Health Services Inc., among others, hold a substantial market share in the US freestanding emergency department market.

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