



AAOS

Orthopaedic

Industry Report

Overview

A clearer view of where orthopaedics is going and what it means for your business

Orthopaedic leaders are making high-stakes decisions without a complete view of the market. Fragmented data, shifting care models, and evolving reimbursement are making it harder to confidently invest, position products, and grow. **The AAOS Orthopaedic Industry Report provides clarity.**

This report draws on claims data, demographic trends, registry insights and AAOS member intelligence, as well as advocacy perspectives and AAOS clinical practice guidelines, providing an integrated view of the forces influencing orthopaedic care delivery. It delivers a unified, data-driven view of how clinical demand, site-of-care shifts, reimbursement pressure, and workforce dynamics are reshaping the orthopaedic ecosystem.

Why This Report Matters

In a rapidly evolving orthopaedic market, having a clear, integrated view of trends is critical to making confident strategic decisions.

Use these insights to make more confident commercial and investment decisions.

Ground your strategy in a clearer understanding of where demand, care delivery, and value are shifting across orthopaedics.



Refine product strategy and market positioning

Align your offerings to the clinical, operational, and financial realities healthcare systems and physicians are navigating



Strengthen customer and stakeholder conversations

Speak directly to the pressures shaping decision-making, from reimbursement to site-of-care changes



Identify where growth and opportunity are emerging

Spot shifts in procedures, settings, and technology adoption that impact how and where business happens

What This Report Shows You

- ✓ Where demand is growing and where it's shifting
- ✓ How care delivery is moving across settings (hospital → ASC → office)
- ✓ What financial pressures healthcare systems and physicians are facing and how that impacts buying decisions
- ✓ Where the next phase of value creation is happening across the care continuum

What You Gain

Built from AAOS' unmatched access to national data and the orthopaedic community, this report synthesizes:

- ✓ Clinical activity and procedural trends
- ✓ Claims and reimbursement dynamics
- ✓ Workforce and care team design
- ✓ Site-of-care migration
- ✓ Technology and innovation adoption



A single, objective view of the orthopaedic market so you can make more informed decisions across product, marketing, and commercial strategy. This report shows how orthopaedics is changing and what those changes mean for how you engage, invest, and grow.

A Sample of What You'll See in the Report

Site-of-Care Is Shifting, But Not Equally

Ambulatory Surgery Center (ASC) migration is accelerating unevenly across subspecialties.

➔ **What this means for you:** Understanding where value is generated across the care continuum is critical for aligning product strategy, pricing, and commercial focus.

Technology Adoption Is Accelerating (With Scrutiny)

Use of technology to assist in procedures like total hip and knee arthroplasty continues to rise.

- Growth in robotics and advanced tools
- Increasing need to justify clinical and financial value

➔ **What this means for you:** Healthcare systems and physicians are balancing innovation with cost pressure, raising expectations for vendors to demonstrate measurable value.

A Small Slice of Care Drives the Majority of Revenue

Surgical procedures account for 1.4% of orthopaedic service line procedural volume, but account for 65% of orthopaedic service line revenue

➔ **What this means for you:** Understanding where value is generated across the care continuum is critical for aligning product strategy, pricing, and commercial focus.



The 2025 AAOS Orthopaedic Industry Report is Now Available

[Access the report](#) and explore the latest insights shaping the orthopaedic industry.

Extend the Value Beyond the Report

Real surgeon perspectives aren't optional, they're essential. AAOS doesn't just provide insight, we work alongside you to apply it.

Build on the Orthopaedic Industry Report with custom research and strategic insights:

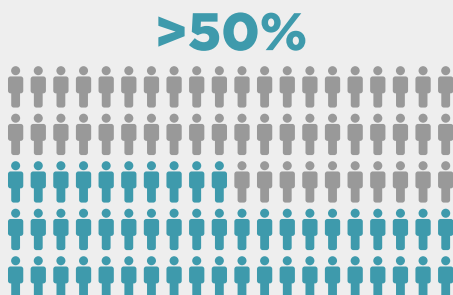
- Deep dives into subspecialties or target segments
- Market validation and unmet need analysis
- Strategy and positioning support tied to AAOS engagement
- Real surgeon insights outside of usual feedback loops and trusted human sources

What this looks like in practice:

Through custom market research services with AAOS member surgeons, organizations can gain insights such as:

Example Insight: Acute Pain Management & Unmet Need

A survey of AAOS member surgeons explored how moderate-to-severe acute pain is currently managed in practice, highlighting challenges with existing treatment options.



- Over half of respondents reported difficulty effectively managing acute pain with current medications
- Nearly half encounter patients who prefer to avoid opioid-based treatments
- A majority expressed strong demand for new non-opioid alternatives



These plus all findings from the survey demonstrate a clear desire for more effective and diverse medication options and help further improve options for patient care.

Example Insight: Enabling Technology Adoption

A survey of AAOS member surgeons captures how enabling technologies are being adopted in real-world orthopaedic practice.



- Robotic-assisted platforms, computer navigation systems, and pre-operative planning software are among the most commonly used technologies



This provides a clearer view of which technologies are gaining traction in practice, helping inform product prioritization, refine go-to-market strategy, and align investment decisions with how providers are evaluating and adopting new tools.

Example Insights: Surgeon Perspectives on Demand Drivers

A survey of AAOS member surgeons highlights the real-world factors influencing demand for elective procedures, beyond what claims data alone can capture.



- Insurance instability and patient concerns around coverage emerged as the top driver impacting procedure volume
- Inflation and cost-of-living pressures were also cited as key factors influencing patient decision-making



By combining macroeconomic signals with direct input from AAOS member surgeons, this insight provides a clearer, real-world view of how patient behavior and demand are shifting, helping anticipate changes earlier, refine forecasts, and align strategy with how decisions are actually made in practice.



From foundational benchmarks to tailored intelligence, AAOS helps you move from insight to action, grounded in the realities of orthopaedic care. To learn more about custom market research services, contact Angela Buckley at buckley@aaos.org or [click here](#).

