Snapshot 2022

WOMEN'S HEALTH

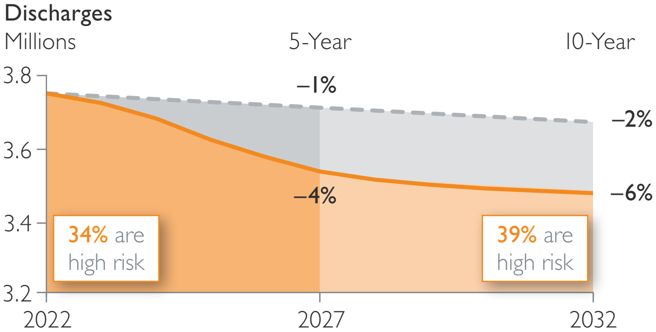
LANDSCAPE

Birth rate decline and digital competition continue to limit growth opportunities in women's health programs. Obstetrics strategies focus on growing market share, expanding high-risk capabilities and addressing racial inequities deeply rooted in disparate maternal morbidity and mortality outcomes. Gynecologic programs seek to keep pace with femtech companies entering the race for direct-to-consumer gynecologic wellness services by evolving low-acuity service offerings and enhancing programmatic offerings aimed at higher-acuity gynecologic needs (eg, midlife services, MIG surgery). Women's health programs must combine dynamic engagement strategies with a comprehensive service mix to build trust and drive targeted growth.

TOP TRENDS

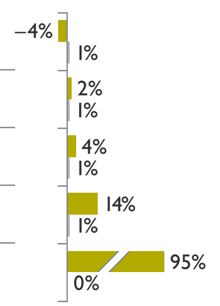
- Organizations compete for a shrinking number of total births, incorporating high-touch tactics, such as virtual engagement, RPM, midwifery and facility design improvements.
- The proportion of high-risk pregnancies accelerates, driven by obesity-related comorbidities, such as hypertensive disorders of pregnancy and gestational diabetes.
- Racial disparities in maternal and infant outcomes necessitate increased funding and attention. Leading efforts include implicit bias training for obstetrics care providers, rural OB care models and extended Medicaid coverage for up to one year postpartum.
- Insurance coverage for fertility services grows along with demand. Employers increasingly differentiate their benefits packages with comprehensive fertility coverage and support.
- Complex hysteroscopic procedures are increasingly performed in the office setting, often with sedation delivered by a contracted provider (eg, CRNA).
- Engagement efforts directed at the midlife patient population—backed by specialized clinical services—are tied to overall market share gains. Wellness integration is a differentiator.
- Improvements in breast imaging modalities (eg, MRI, ultrasound) reduce downstream utilization (eg, diagnostic mammograms, biopsies). High-risk women and women with dense breasts will drive growth in abbreviated MRI utilization.
- The evolution from telehealth services to a mature digital health competency enables comprehensive care delivery (eg, contraception management, consultations) and consumer engagement and coordination (eg, scheduling, messaging, monitoring).
- Femtech companies (eg, whole-woman virtual clinics, prescription delivery services, diagnostic services for endometriosis) emerge and energize investment in women's health. As these companies enter the playing field, services can complement or disrupt existing care paths.

Inpatient Deliveries Forecast
US Market, 2022–2032



Outpatient Obstetrics Procedures Forecast
US Market, 2022–2027

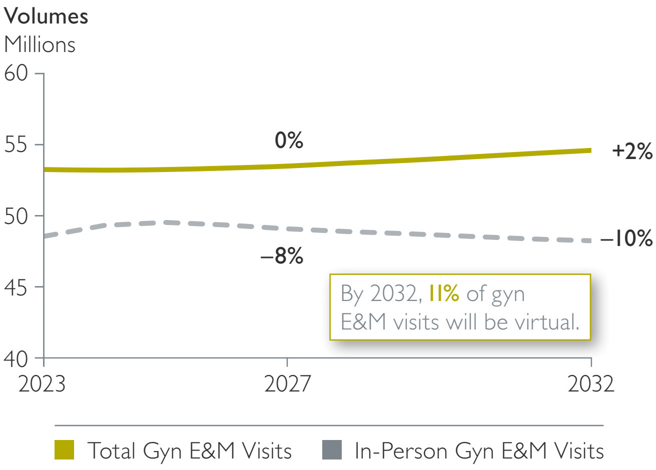
	2022 Volumes
Ultrasound	17M
Fetal Monitoring and NSTs	9M
Level 2 Fetal Ultrasound	8M
OB Image-Guided Therapeutics	4K
Fetal Intervention*	<1K



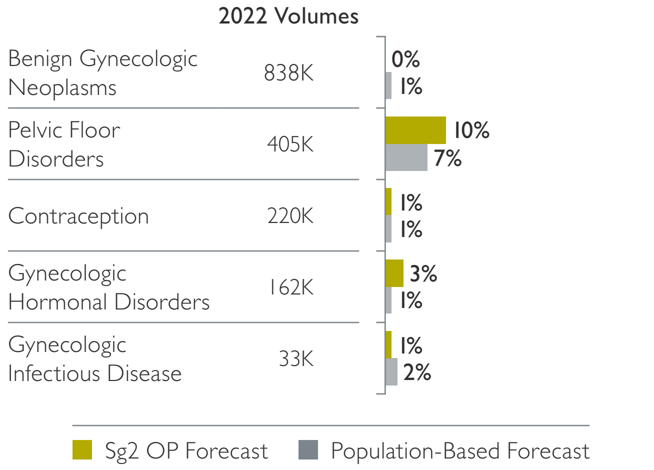
Sg2 IP Forecast | Population-Based Forecast | Sg2 OP Forecast

*Fetal intervention includes inpatient and outpatient volumes. **Note:** Obstetrics analysis includes all ages. Deliveries include all vaginal delivery and c-section procedures. CRNA = certified registered nurse anesthetist; MIG = minimally invasive gynecology; NST = nonstress test; RPM = remote patient monitoring. **Sources:** Impact of Change®, 2022; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2019. Agency for Healthcare Research and Quality, Rockville, MD; Proprietary Sg2 All-Payer Claims Data Set, 2019; The following 2019 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2022; Sg2 Analysis, 2022.

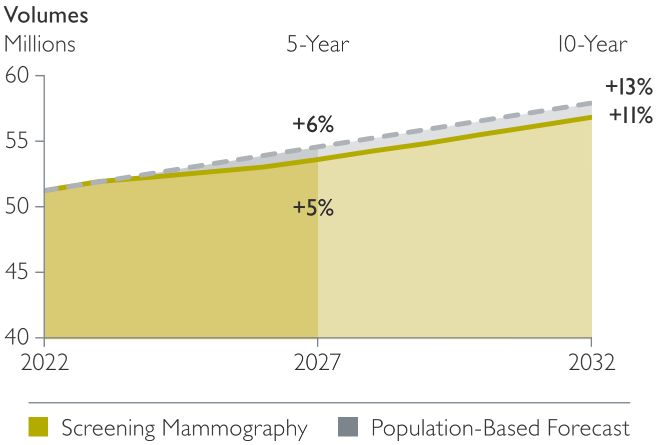
Gynecology E&M Visits Forecast
US Market, 2023–2032



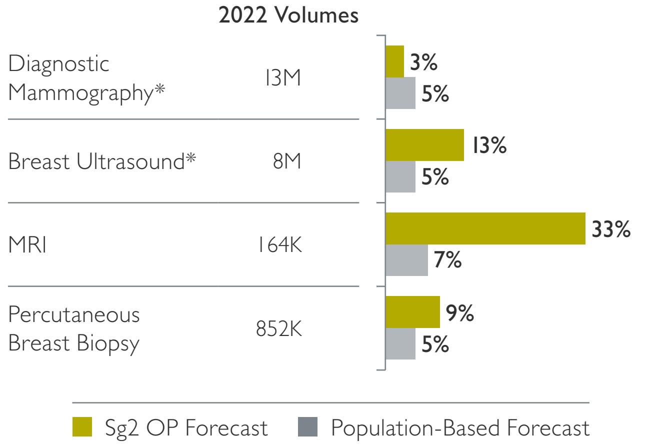
Gynecology Major Procedures Forecast
US Market, 2022–2027



Screening Mammography* Forecast
US Market, 2022–2032



Outpatient Breast Health Services Forecast
US Market, 2022–2027



ACTION STEPS TO DRIVE VALUE

- Prioritize the maternal morbidity and mortality crisis. Closing the racial disparity gap is fundamental to improving maternal and infant outcomes. Explore opportunities to align with payers on quality improvement initiatives.
- Reassess the obstetrics competitive landscape and maternal-neonatal care path, as declining birth rates may have induced market share and referral pattern shifts.
- Invest in upstream prevention to address the rising acuity and complexity in the maternal and neonatal populations (eg, educational groups, nutrition initiatives, virtual medical home models). Ensure access to MFM and develop programming for patients with comorbidities, such as diabetes and hypertension.
- Assess your market to determine the impact of the US Supreme Court ruling in *Dobbs v Jackson Women's Health Organization*. Review the Sg2 Report: *Sg2 Projects Abortion Ruling's Impact on Obstetrics and Neonatal Services.*
- Elevate consumer engagement strategies. Assess potential collaboration with emerging femtech companies, starting with whole-woman care delivered via patient-centric care models.
- Evaluate the System of CARE for breast imaging, urogynecology and outpatient gynecological surgical services to optimize patient access and experience (eg, provider type, location).

*Includes all service lines. **Note:** Analysis excludes 0–17 age group. Virtual visits are forecasted as a percentage of total visits—evaluation and management beginning in year 1 of the forecast. CARE = Clinical Alignment and Resource Effectiveness; E&M = evaluation and management; gyn = gynecology; MFM = maternal-fetal medicine.
Sources: Impact of Change®, 2022; Proprietary Sg2 All-Payer Claims Data Set, 2019; The following 2019 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2022; Sg2 Analysis, 2022.