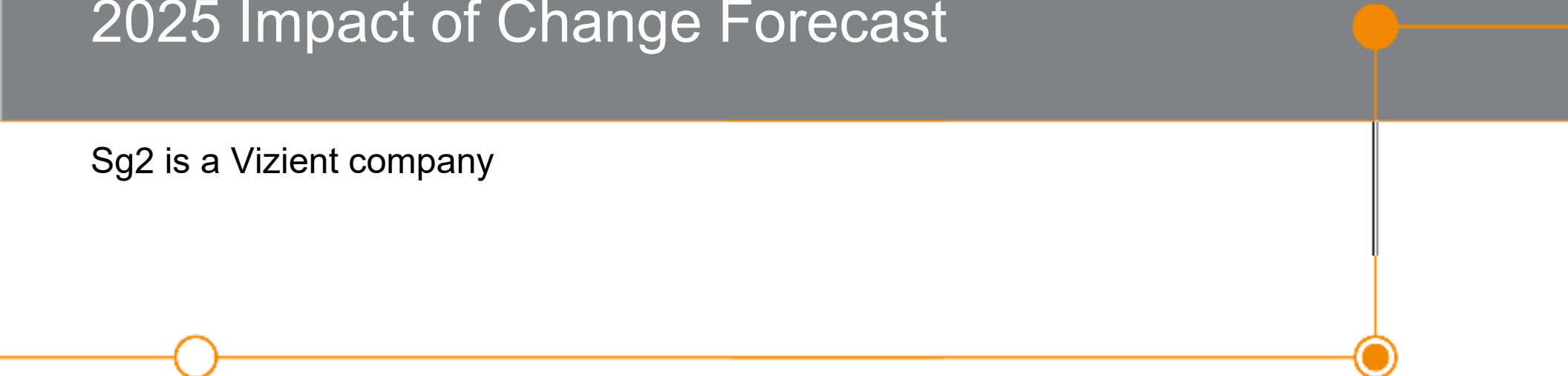


# 2025 Impact of Change Forecast

Sg2 is a Vizient company

June 2025



A horizontal orange line with two circular markers. The left marker is an orange outline, and the right marker is a solid orange circle. A vertical line segment connects the two markers, with a solid orange circle at the top and a solid orange circle at the bottom. The top circle is positioned on the right side of the slide, and the bottom circle is positioned on the right side of the slide.

## 2025 Impact of Change Forecast Key Takeaways

- The 2025 Impact of Change Forecast provides 10-year projections for anticipated shifts in sites of care delivery across the nation, including:
  - Outpatient (OP) care patient volumes projected to grow 18%
  - Inpatient (IP) care patient discharges to grow 5%
  - Pediatric OP volume growth forecasted at 8%
  - Cancer OP volumes expected to grow 18%, while IP remains flat
  - GLP-1s will contribute to slowing growth in IP discharges for type 2 diabetes patients to 8%
  - Post-Acute Care to grow 31%

## 2025 Impact of Change Highlights: Growth Expected Across Key Forecasts Over the Decade



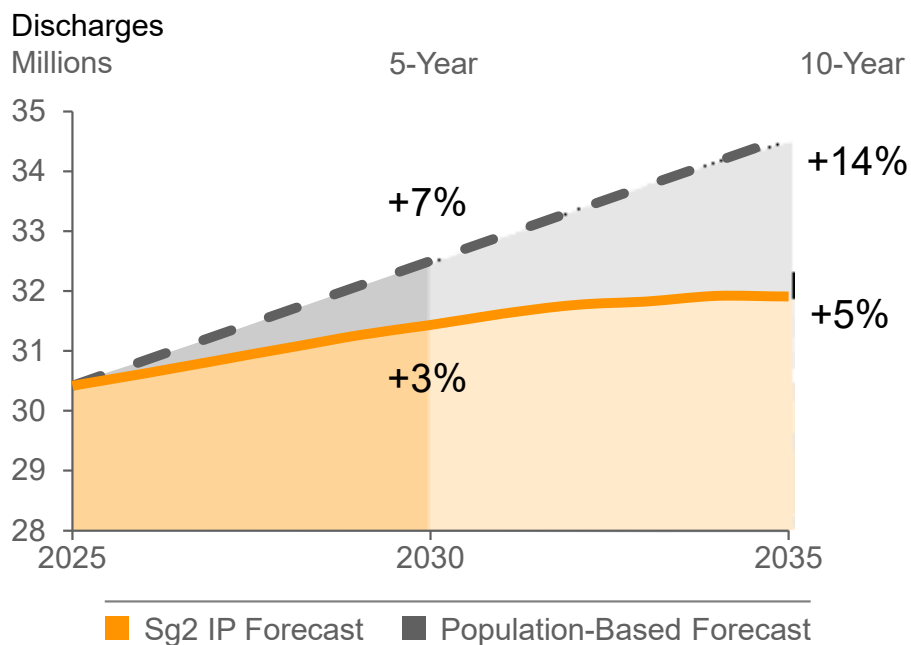
 = Inpatient  = Outpatient

**Note:** Analysis excludes 0–17 age group. ED defined as visits—emergent and visits—urgent procedure group. OP surgery defined as procedures—major and endoscopy procedure groups. E&M visits defined as visits—evaluation and management, established patient visits—in person, established patient visits—virtual, new patient visits—in person, new patient visits—virtual; post-acute care defined as post-acute services: home and domiciliary hospice visits; home nurse visit; home visits other; hospice stays; SNF stays; procedures—minor: home infusion—chemotherapy; procedures—minor: home infusion—medications; rehab: home physical/occupational therapy treatments; visits—evaluation and management: home and domiciliary evaluation and management visits. E&M = evaluation and management; PAC = post-acute care; SNF = skilled nursing facility; surg = surgery. **Sources:** Impact of Change®, 2025; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2021. Agency for Healthcare Research and Quality, Rockville, MD; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

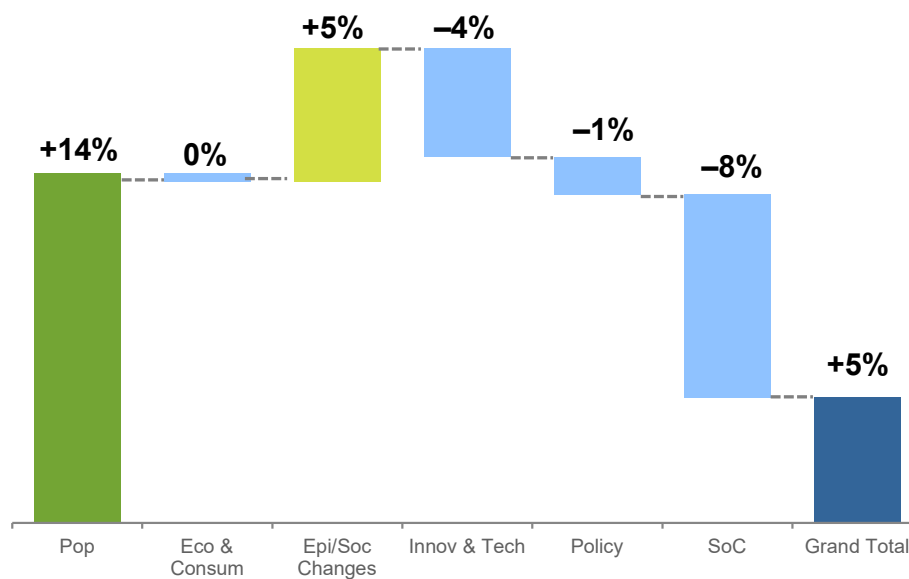


# Modest Rises in Inpatient Volumes Expected Due to Rising Patient Acuity

## Adult Inpatient Forecast US Market, 2025–2035



## Adult Inpatient Forecast Impact Factors US Market, 2025–2035

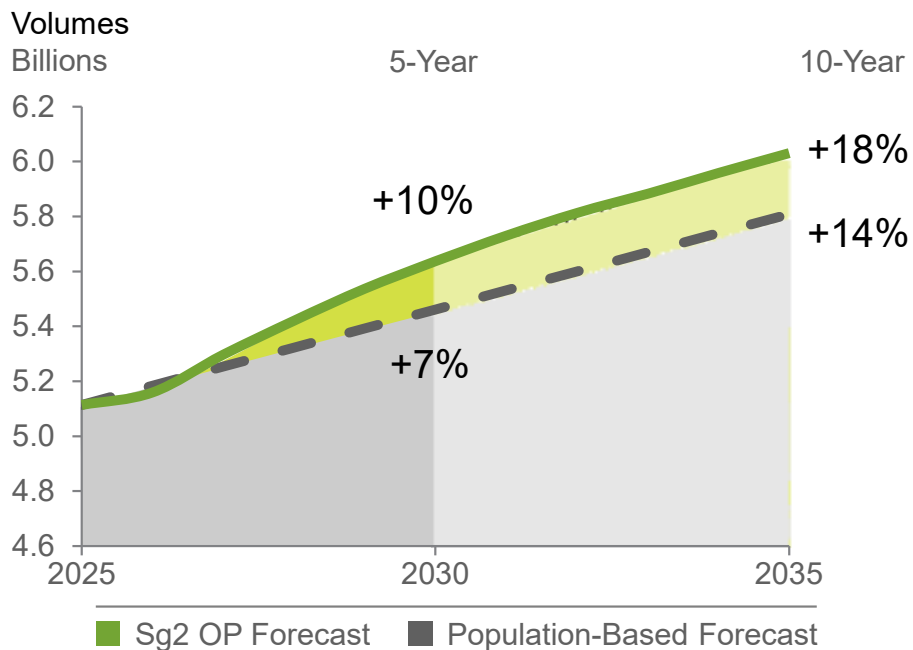


**Note:** Analysis excludes 0–17 age group. 0% indicates the forecast is flat (less than  $\pm 1\%$ ). Eco & Consum = Economy and Consumerism; Epi/Soc Changes = Epidemiology/Sociocultural Changes; Innov & Tech = Innovation and Technology; Pop = Population; SoC = Systems of CARE. **Sources:** Impact of Change®, 2025; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2021. Agency for Healthcare Research and Quality, Rockville, MD; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

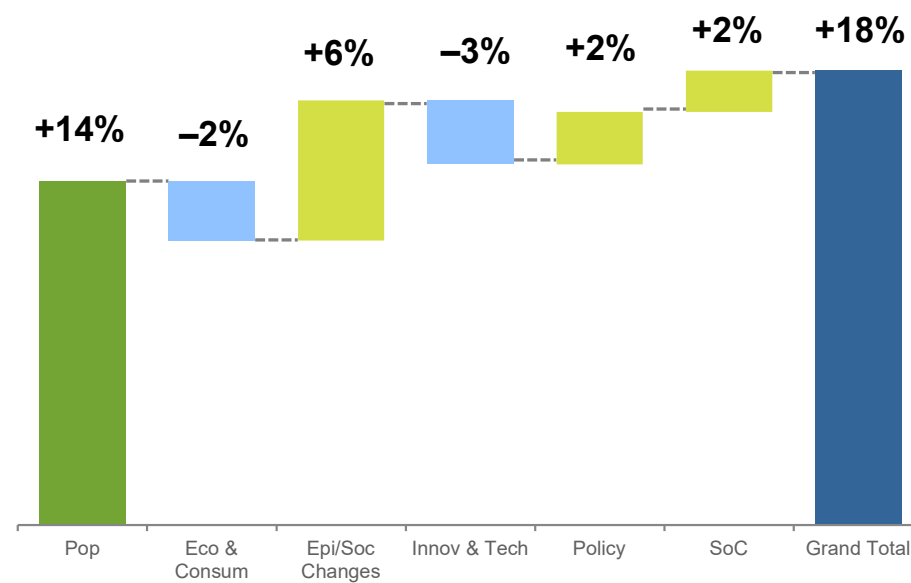


# Outpatient Demand Outpaces Population-Based Demand Projections

## Adult Outpatient Forecast US Market, 2025–2035



## Adult Outpatient Forecast Impact Factors US Market, 2025–2035



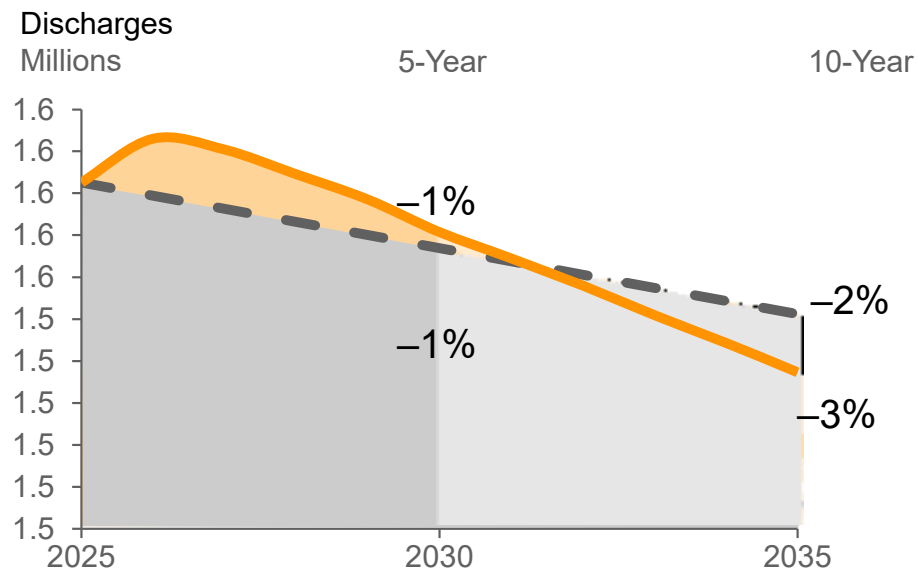
**Note:** Analysis excludes 0–17 age group. Eco & Consum = Economy and Consumerism; Epi/Soc Changes = Epidemiology/Sociocultural Changes; Innov & Tech = Innovation and Technology; Pop = Population; SoC = Systems of CARE. **Sources:** Impact of Change®, 2025; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

Confidential and Proprietary © 2025 Sg2

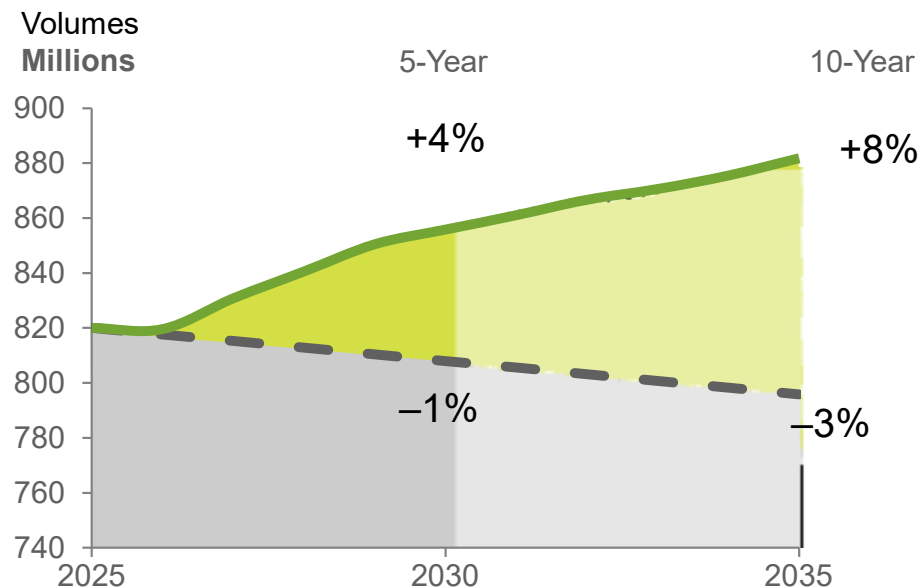


# Inpatient Pediatric Forecast Declines as Outpatient Pediatric Growth Climbs

**Pediatric Inpatient Forecast**  
US Market, 2025–2035



**Pediatric Outpatient Forecast**  
US Market, 2025–2035



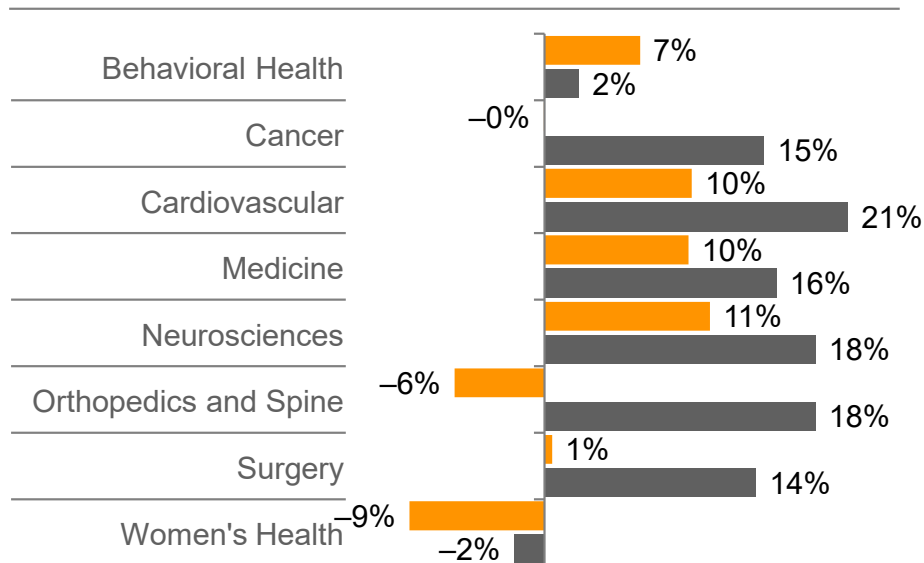
■ Sg2 IP Forecast ■ Population-Based Forecast ■ Sg2 OP Forecast

**Note:** Analysis includes 0–17 age group only. Inpatient forecast excludes live births. **Sources:** Impact of Change®, 2025; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2021. Agency for Healthcare Research and Quality, Rockville, MD; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

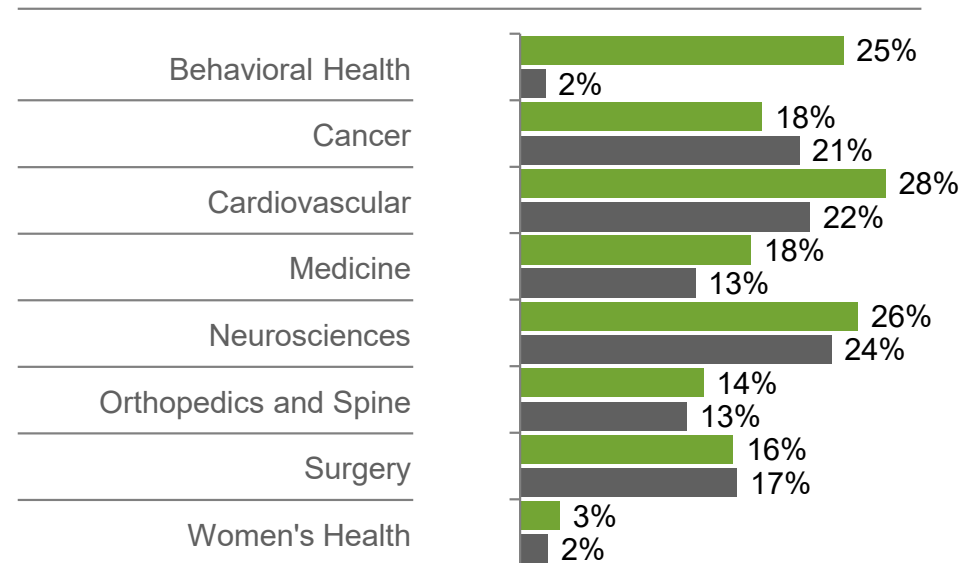


## Utilization Trends Vary Across Service Lines

**Inpatient Service Line Growth**  
US Market, 2025–2035



**Outpatient Service Line Growth**  
US Market, 2025–2035



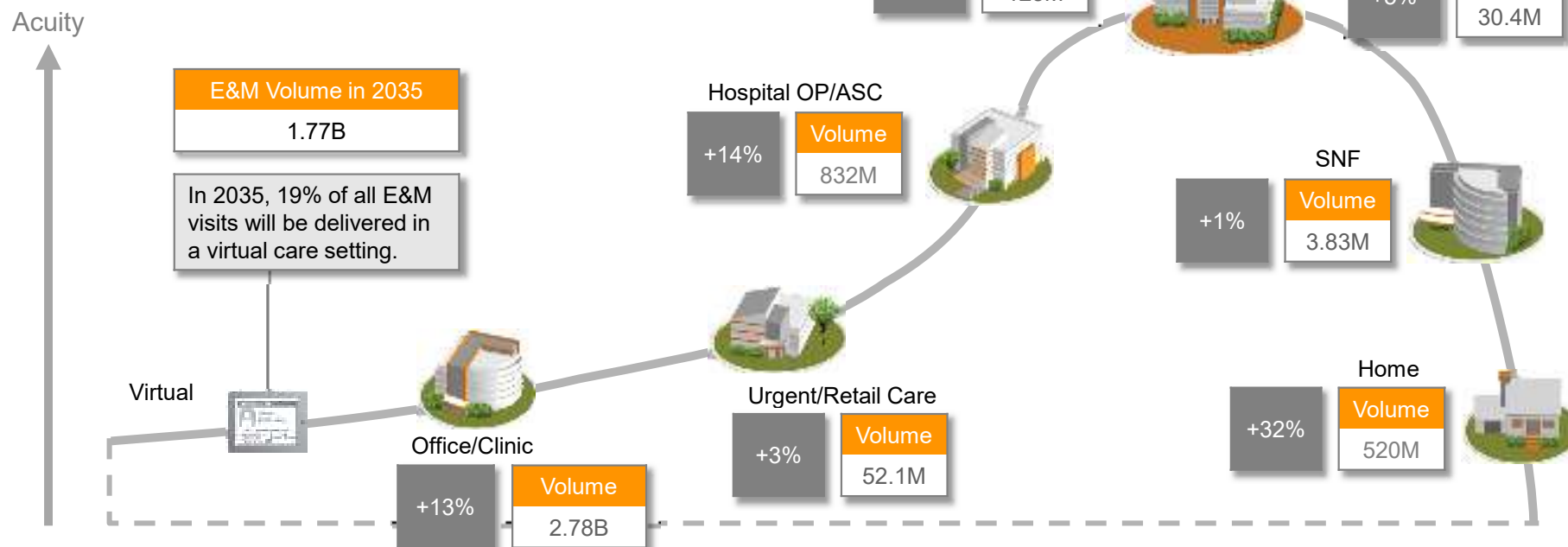
■ Sg2 IP Forecast ■ Population-Based Forecast ■ Sg2 OP Forecast

**Note:** Analysis excludes 0–17 age group. 0% indicates the forecast is flat (less than  $\pm 1\%$ ). Behavioral Health includes behavioral health service line and Poisonings—Commonly Abused Drugs CARE Family. Cardiovascular includes cardiology and vascular. Medicine includes allergy and immunology, dermatology, endocrinology, gastroenterology, genetics, general medicine, hematology, hepatology, infectious diseases, nephrology, pulmonology, and rheumatology. Surgery includes burns and wounds, otolaryngology, general surgery, ophthalmology, and urology. **Sources:** Impact of Change®, 2025; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2021. Agency for Healthcare Research and Quality, Rockville, MD; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.



# Orchestrate Seamless Care Across the Care Continuum

## 2025 Site of Care Volumes and 10-Year Forecast US Market, 2025–2035



**Notes:** Analysis excludes 0–17 age group. ED forecast defined as urgent and emergent visits. E&M visits defined as visits—evaluation and management, established patient visits—in person, established patient visits—virtual, new patient visits—in person, new patient visits—virtual. ASC = ambulatory surgery center; SNF = skilled nursing facility. **Sources:** Impact of Change®, 2025; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2021. Agency for Healthcare Research and Quality, Rockville, MD; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

Confidential and Proprietary © 2025 Sg2





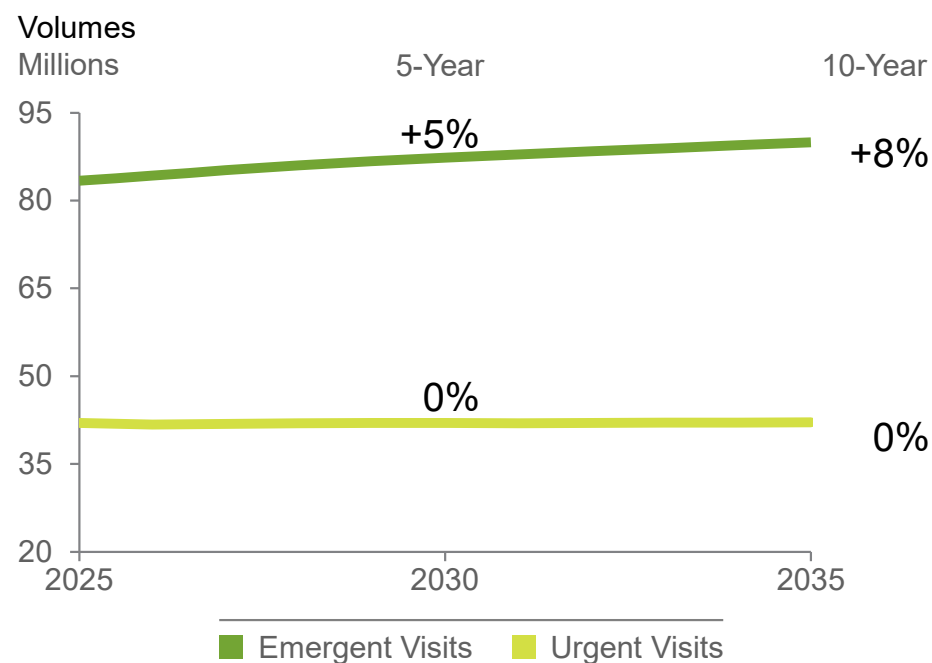
## ED Volumes Grow as Acuity Rises and Shift of Low-Acuity Urgent Visits Slows

ED volumes  
to grow

5%

by 2035

### Adult Emergency Department Visits Forecast US Market, 2025–2035



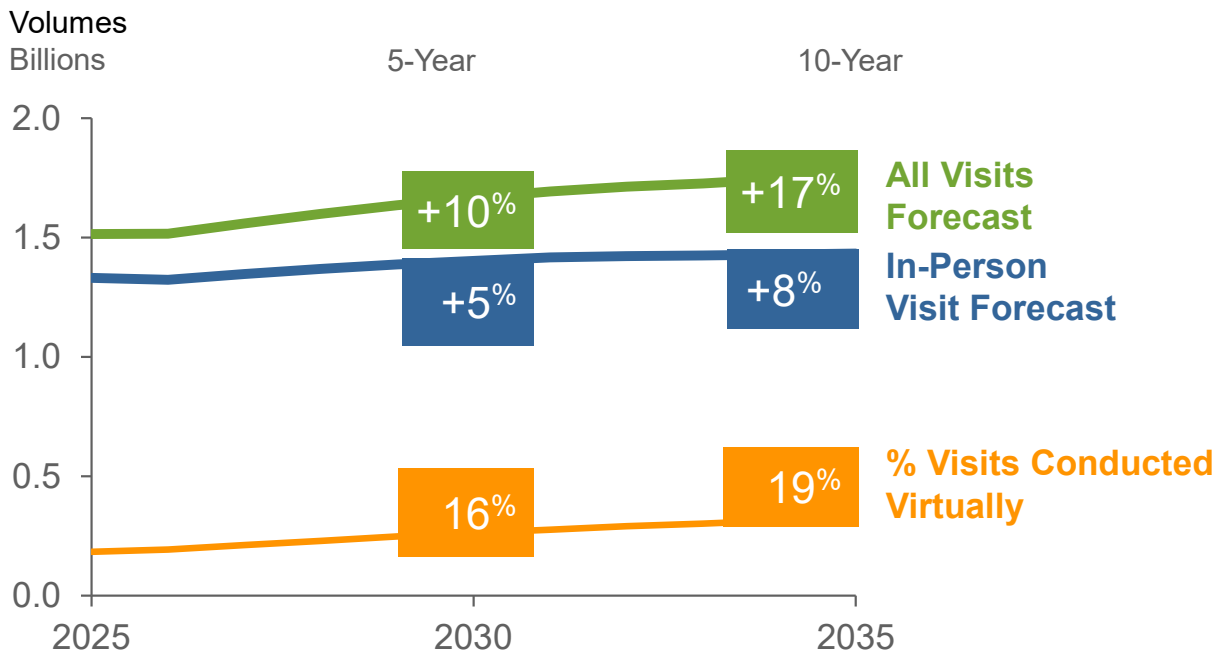
**Notes:** Analysis excludes 0–17 age group. 0% indicates the forecast is flat (less than  $\pm 1\%$ ). ED forecast defined as urgent and emergent visits. **Sources:** Impact of Change®, 2025; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

Confidential and Proprietary © 2025 Sg2



# Shift to Virtual Continues Despite Payment and Investment Headwinds

## E&M Visits Forecast US Market, 2025–2035



### In-Person Visits 10-Year Forecast

<b>13%</b>	<b>7%</b>
New Patient Visits	Established Patient Visits

### Virtual Visits Penetration by 2035

<b>11%*</b>	<b>20%*</b>
New Patient Visits	Established Patient Visits

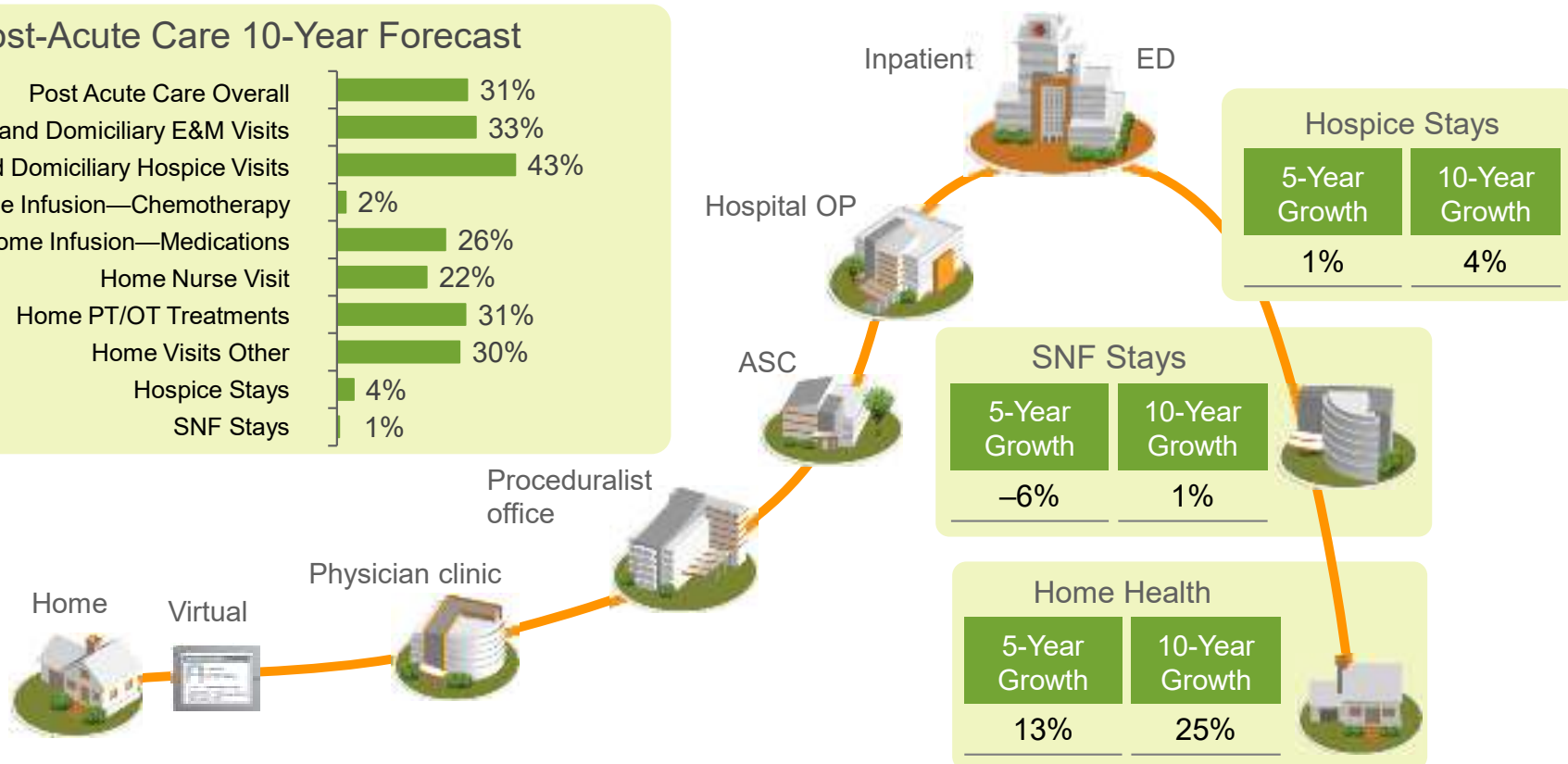
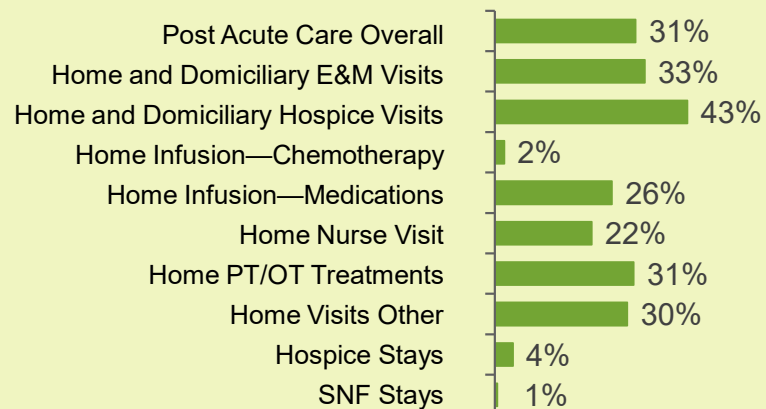
\*Percentage of E&M visits occurring virtually. **Note:** Analysis excludes 0–17 age group. E&M visits defined as visits—evaluation and management, established patient visits—in person, established patient visits—virtual, new patient visits—in person, new patient visits—virtual. **Sources:** Impact of Change®, 2025; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

Confidential and Proprietary © 2025 Sg2



# Post-Acute Growth Fueled by Innovation and Adoption of Emerging Care Models

## Post-Acute Care 10-Year Forecast



**Note:** Analysis excludes 0–17 age group. Home Health is defined as procedures home nurse visits and home visits other. ASC = ambulatory surgery center; SNF = skilled nursing facility. **Sources:** Impact of Change®, 2025; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025. Confidential and Proprietary © 2025 Sg2





## METHODOLOGY

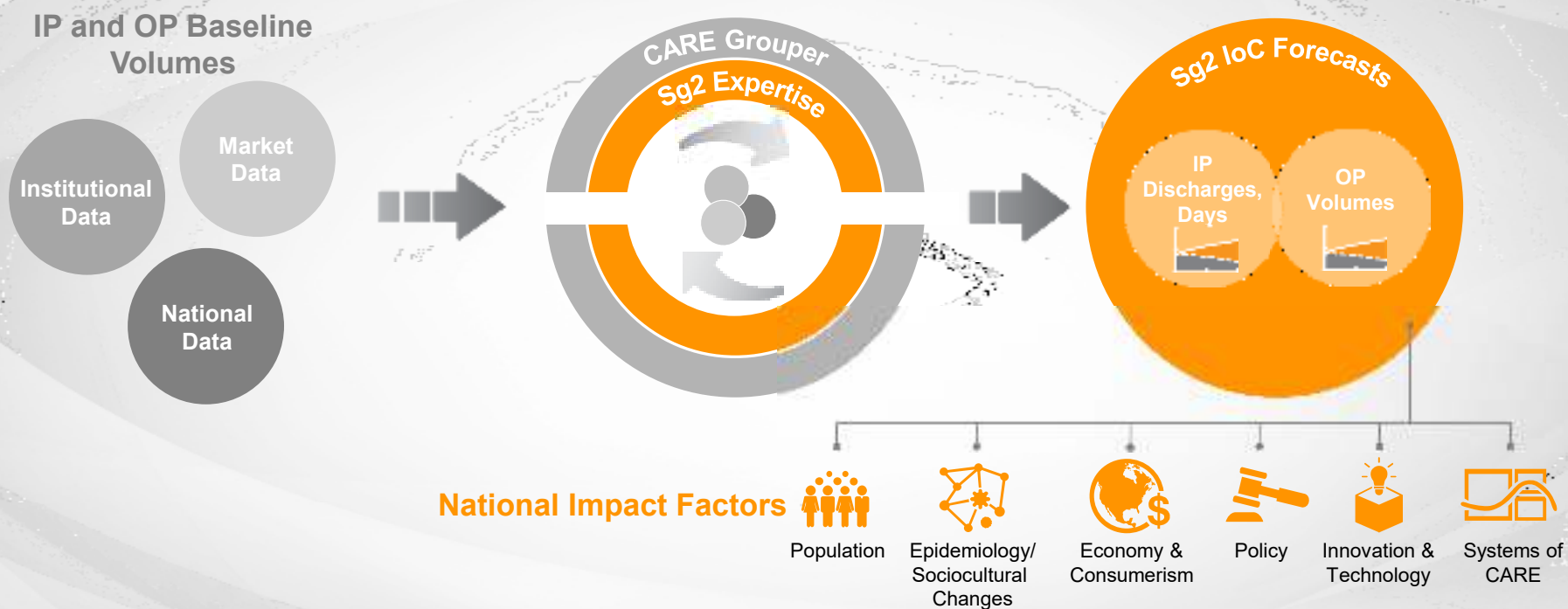
### THE POWER OF DISEASE-BASED FORECASTING

Sg2's Impact of Change model forecasts demand for health care services over the next decade, examining the cumulative effects and interdependencies of key impact factors driving change in utilization. Using both disease-based and MS-DRG-based analyses, the forecast provides a comprehensive picture of how patients will access inpatient and outpatient services along the continuum of care.

## SOURCES

Impact of Change®, 2025; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2021. Agency for Healthcare Research and Quality, Rockville, MD; Proprietary Sg2 All-Payer Claims Data Set, 2023; The following 2023 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2025; Sg2 Analysis, 2025.

# Sg2's Impact of Change Forecast Methodology



IoC = Impact of Change.

## Categorize Your Data Across **27,000+** Unique CARE Group Combinations, Including...

**30**

Service Lines  
(Across the  
System of  
CARE)

**253**

CARE Families  
(Disease  
Conditions)

**79**

Inpatient  
Procedures

**216**

Outpatient  
Procedures

CARE = Clinical Alignment and Resource Effectiveness.

Sg2, a Vizient company, is the health care industry's trusted partner for accelerating growth and improving financial results. Our analytics and expertise help health care leaders achieve sustainable growth and maintain market relevance by optimizing System of CARE, payer and consumer strategies.



Sg2.com  
847.779.5300