FACTFILE
JULY/AUGUST 2022
healthleaders

The next decade in health care: increased volumes and shifts in care sites

Inpatient and outpatient volumes expected to increase

In 2021 volumes were suppressed as the COVID-19 pandemic continued, with inpatient volumes remaining down 5% from 2019. According to the 2022 Impact of Change® report, published annually by Sg2, a Vizient company, inpatient volumes are growing below population as low-acuity services are shifting to outpatient.

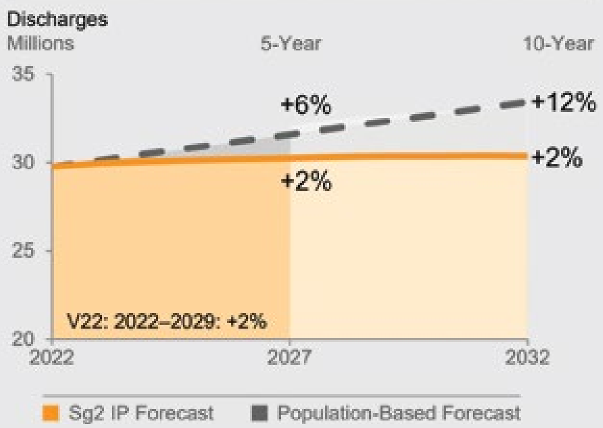
This rise is a result of two notable trends:

1. The increased acuity as patients age and present with more complex conditions.

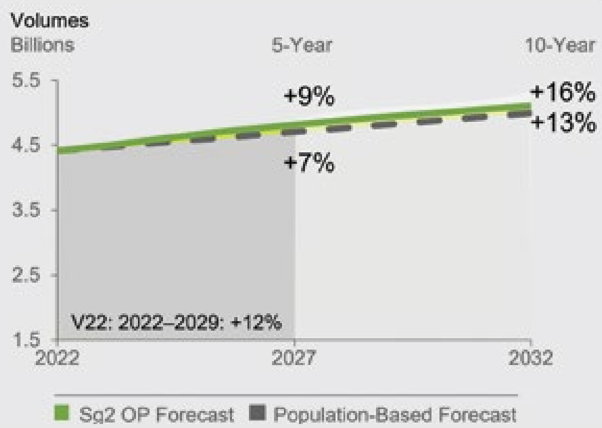
2. The volumes that could be safely shifted to outpatient will begin to reach a floor for select conditions. With this increased volume comes increased patient complexity and longer lengths of stay, which could lead to capacity constraints.

Following a similar pattern, outpatient volumes remained below 2019 levels, but are anticipated to return and grow slightly above estimated population growth by 2032 because of the aging population, increased survivorship, and the incidence of chronic disease continuing to grow.

Adult Inpatient Forecast
US Market, 2022–2032



Adult Outpatient Forecast
US Market, 2022–2032



Note: Analysis excludes 0–17 age group. **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.

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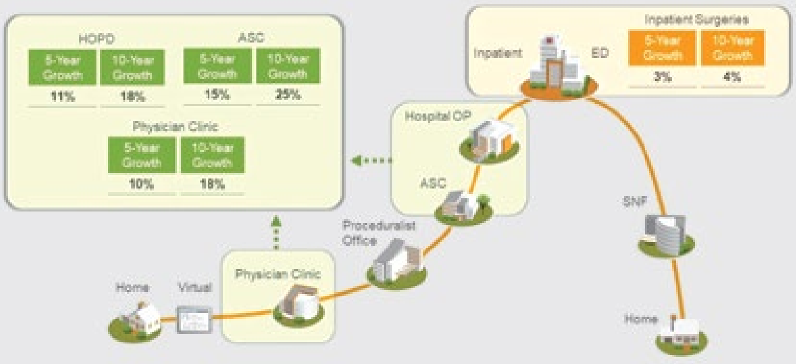
The shift in sites of care will continue, but soften

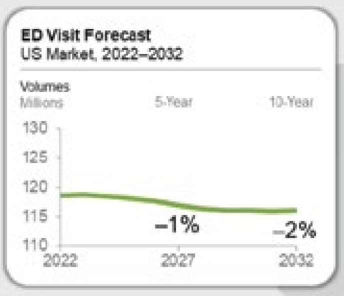
The pandemic fast-tracked the shift in volumes from inpatient to lower-cost settings. While this trend will continue, the surgical shift to outpatient facilities is expected to soften, resulting in a 4% increase in inpatient surgical procedures by 2032. In addition to surgical volume shifts, medical visits will continue to move toward virtual and home settings as seen throughout the pandemic, leading to a 20% increase over the decade, primarily in supply-constrained specialties where frequent touch points support positive outcomes, like behavioral health.

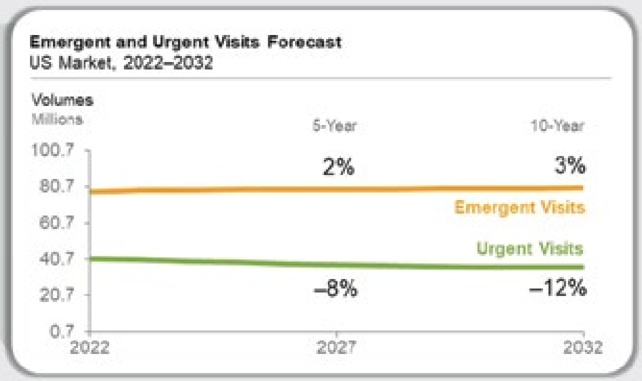


Note: Analysis excludes 0–17 age group. Forecast pulled for procedures—major and endoscopy volumes only. ASC = ambulatory surgery center; HOPD = hospital outpatient department; SNF = skilled nursing facility. **Sources:** Impact of Change®, 2022; HCUP National Inpatient Sample (NIS); Healthcare Cost 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.

Emergency departments to see an increase in volume this year

Emergency department (ED) volumes have fluctuated with COVID-19 surges and were significantly lower compared to pre-pandemic volumes nationally in 2021, ranging from a 7% to 14% decline versus the same time periods in 2019. EDs are expected to see an increase in volumes this year as social distancing measures expire and people return to their routines. Looking over the next decade, lower-acuity cases moving out of the ED toward urgent care sites is a trend expected to continue; however, this shift will slow as volumes begin to reach a floor. Those patients who remain in the ED will be more complex, require increased access to resources, and have longer lengths of stay, likely driving an increase of ED patients admitted into inpatient care.





Note: Analysis excludes 0–17 age group. **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.

Prioritizing for the future

The forecast provided has been developed through expert-led research and data-driven methodology at the market level, driven heavily by Systems of CARE and Epidemiology on the IP side and population and epidemiology on the OP side.

- Consider service line prioritization, service distribution, and care at home investment initiatives to help mitigate potential capacity constraints as the population ages and presents with more complex cases.
- Redesign care delivery to leverage remote patient monitoring and other in-home or virtual options to increase operational efficiency and lower costs.
- Prepare for more complex, higher-acuity cases across all sites of care, requiring renewed focus on efficient care delivery to meet patient demand.

About Vizient, Inc.

Vizient, Inc., the nation's largest health care performance improvement company, serves more than 50% of the nation's acute care providers, which includes 97% of the nation's academic medical centers, and more than 20% of ambulatory care providers. Vizient provides expertise, analytics and advisory services, as well as a contract portfolio that represents more than $130 billion in annual purchasing volume. Vizient's solutions and services improve the delivery of high-value care by aligning cost, quality and market performance. Headquartered in Irving, Texas, Vizient has offices throughout the United States. Learn more at www.vizientinc.com.