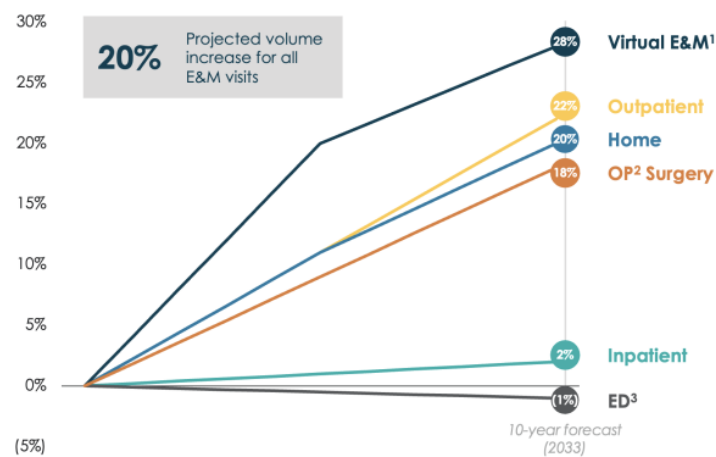


## Hospital volumes shifting to outpatient and home-based settings.

The pandemic accelerated the [outpatient shift](#), which had been progressing steadily for decades, into a new gear, as safety-minded consumers avoided inpatient settings. Using the latest forecasting data from strategic healthcare consulting firm [Sg2](#), the graphic below illustrates how the outpatient shift will continue to accelerate in the coming years. With each projected to grow by 20 percent or more, **outpatient, virtual, and home-based care services will continue far outpace growth in hospital-based care over the next decade.** Ambulatory surgery centers (ASCs) will be at the center of this care shift, reflected by a projected 25 percent rise in ASC volumes by 2032. The breadth of care available at home will also expand as care delivery technology improves. With the population becoming older and sicker, **higher incidence of chronic disease will be met by a rapid expansion of home evaluation and management services (E&M), reflecting a shift away from hospitals and doctors' offices as hubs for complex care management.** Instead, the patients still coming to hospitals will present with increasingly acute conditions, **driving up demand for resource-intensive critical care, as broader inpatient volume remains relatively flat.**

### Forecast: Virtual, Outpatient and Home Projected to be Fastest Growing Sites of Care Over Next Decade Outpatient Services Projection Fueled Predominately by ASC Growth

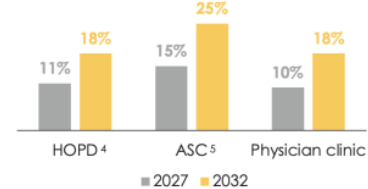
#### Percentage Change in Adult Healthcare Volumes Forecast, 2023



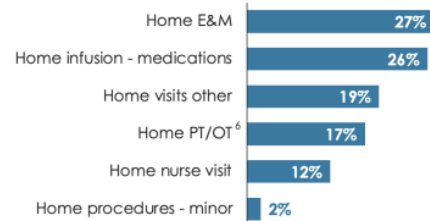
1. Evaluation and management.  
2. Outpatient.  
3. Emergency department.

4. Hospital outpatient department.  
5. Ambulatory surgery center.  
6. Physical therapy/ occupational therapy.

#### Projected Volumes Growth for Outpatient Care, 2022



#### Ten-Year Forecast for Growth of Home Services, 2023



Source: "2023 Impact of Change® Forecast Report", Sg2 Healthcare Intelligence, June 2023; "2022 Impact of Change® Forecast Report", Sg2 Healthcare Intelligence, 7 June 2022; Gist Healthcare analysis.