Using Demand Forecasting to Support Revenue Strategies
SCHA CFO Forum

Brad Helfand
Vice President, Sg2

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Phone: 847.779.5338
Meet Sg2

Sg2, a MedAssets Company, is the health care industry’s premier provider of market data and information.

Our analytics and expertise help hospitals and health systems understand market dynamics and capitalize on opportunities for growth. Your single source for market data solutions.

Sg2 OFFERINGS

- Powerful Analytics
- Data Resources
- Unmatched Expertise and Intelligence
- Industry-Leading Consulting
Session Learning Objectives

- Understand the impact factors beyond population growth and aging that will affect the long-term demand for health care services.
- Determine the influence of demand forecasting on revenue-based decision making within a sample service line (e.g., women’s services).
- Connect the importance of demand forecasting to market scenario planning.
- Define a series of advanced growth metrics grounded in demand forecasting.
Agenda

Introduction to Demand Forecasting

Demand Forecasting Deep Dive: Women’s Health
Demand-Driven Revenue Planning
Advanced Growth Metrics
Impact of Change®: Understanding Impact Factors

Impact Factors:
- Population
- Epidemiology
- Economics
- Policy
- Innovation & Technology
- Systems of CARE
- Potentially Avoidable Admissions
- 30-Day Readmissions

Forecast:
- Outpatient Growth: 2014: 4.5B, 2019: 3.5B, 2024: 2.5B, Growth: +21%

Sources: Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
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Our IoC Model by the Numbers

New
- Concussion
- Men’s reproductive health

New
- Screening colonoscopy
- Home sleep studies
- Appendectomy
- Colposcopy/LEEP
- Carpal tunnel release
- Level 2 ultrasound

203 CARE Families
(ie, disease or conditions)

60 inpatient procedures

101 outpatient procedures

24 service lines across inpatient and outpatient settings

Almost 20,000 unique CARE Group forecasts through 2024

Note: Procedures listed may represent only a sample of new procedures added to the 2014–2024 forecast. IoC = Impact of Change; LEEP = loop electrosurgical excision procedure.
Making the Big Calls

PEDIATRICS: 2006
NICU volumes had been on a steadfast incline for more than 30 years when, in 2006, Sg2 predicted a trajectory reversal in the face of tremendous skepticism. 2007 marked the first reported decline in preterm births, and that downward trend continues today.

ORTHOPEDICS: 2005
An aging population and high obesity rates continue to significantly increase demand for total joint replacements. Sg2 anticipated this trend in 2005. To date, national inpatient utilization data have supported Sg2’s joint procedure outlook.

CANCER AND IMAGING: 2004
These are just two of Sg2’s cancer-based forecast projections from 2004, both of which have since been proven accurate.

NICU = neonatal intensive care unit; SBRT = stereotactic body radiation therapy; SRS = stereotactic radiosurgery.
Sources: Impact of Change® v11.0, v12.0, v13.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2013.
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Utilization Shifts Redefine Growth Opportunities

**Adult Inpatient Forecast**
US Market, 2014–2024

- **5-Year**
  - +7%

- **10-Year**
  - +15%

- **5-Year**
  - -2%

- **10-Year**
  - -3%

**Adult Outpatient Forecast**
US Market, 2014–2024

- **5-Year**
  - +14%

- **10-Year**
  - +21%

- **5-Year**
  - +7%

- **10-Year**
  - +14%

**Note:** Forecast excludes 0–17 age group. IP = inpatient; OP = outpatient.

**Sources:** Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.

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## Reform and Other Factors Do Not Impact Service Lines Equally

### Inpatient Service Line Growth Rates
**US Market, 2014–2024**

<table>
<thead>
<tr>
<th>Service Line</th>
<th>Sg2 IP Forecast</th>
<th>Population-Based Forecast</th>
<th>Sg2 OP Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orthopedics and Spine</td>
<td>11%</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Neurosciences</td>
<td>10%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Cancer</td>
<td>3%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Obstetrics</td>
<td>–8%</td>
<td>1%</td>
<td>17%</td>
</tr>
<tr>
<td>Pediatrics</td>
<td>–7%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Medicine/Surgery</td>
<td>–15%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Cardiovascular</td>
<td>–15%</td>
<td>21%</td>
<td>23%</td>
</tr>
</tbody>
</table>

### Outpatient Service Line Growth Rates
**US Market, 2014–2024**

<table>
<thead>
<tr>
<th>Service Line</th>
<th>Sg2 IP Forecast</th>
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<th>Sg2 OP Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orthopedics and Spine</td>
<td>13%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Neurosciences</td>
<td>10%</td>
<td>16%</td>
<td>18%</td>
</tr>
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<td>3%</td>
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</tr>
<tr>
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<td>1%</td>
<td>17%</td>
</tr>
<tr>
<td>Pediatrics</td>
<td>1%</td>
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<tr>
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<td>1%</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Cardiovascular</td>
<td>1%</td>
<td>19%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Note:** All service lines exclude 0–17 age group except for Pediatrics, which excludes ages 18+. Cardiovascular includes cardiology and vascular. Med/Gen Surg includes allergy and immunology, burns, dermatology, endocrinology, ENT, gastroenterology, medicine and surgery, infectious diseases, nephrology, ophthalmology, pulmonology, rheumatology, and urology. Neurosciences includes brain/CNS cancer CARE Family. OP Pediatrics excludes psychiatry, gynecology and obstetrics; IP Pediatrics additionally excludes normal newborns and neonatology. CNS = central nervous system; ENT = ear, nose and throat.

**Sources:** Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
Sg2 Sites of Care Highlight Growth Opportunities Across the Continuum

2014 Site of Care Volumes and 5-Year Forecast, Adults
US Market, 2014–2019

- **Virtual**
  - Office/Clinic: Volume 2.4 Billion, +12%
  - Urgent/Retail Care: Volume 11M, +9%
  - Hospital OP/ASC: Volume 438M, +11%
  - SNF: Volume 6M, +7%
  - Home: Volume 226M, +17%
  - Other: Volume 205M, +14%
  - ED: Volume 106M, +5%
  - Inpatient: Volume 33M, -2%

In 2019, 4% of all E&M visits will be delivered in a virtual care setting.

Note: The analysis excludes 0–17 age group. ASC = ambulatory surgery center; E&M = evaluation and management; SNF = skilled nursing facility.

Sources: Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
Key Cardiovascular Diseases Forecast, 2014–2019

Cardiac Anomaly
- Carditis: 3.9%
- Chest Pain—Noncardiac: 2.1%
- Complication of Device, Implant or Graft—CV: 2.6%

Congestive Heart Failure
- 4.5%
- 2.1%
- 17.2%
- 3.4%
- 2.6%

Coronary Heart Disease
- Dysrhythmia and Cardiac Arrest
- Heart Valve Disease
- Hypertension
- Hypertension Complication
- Myocardial Infarction
- Pulmonary and Other Heart Disease

Sources: Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
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Procedure Volumes
US Market, 2014

- 0.9%
- 3.8%
- 7.3%
- 5.2%
- 19.5%
- 55.2%

Procedures Over Time
US Market, 2014–2024

- Pacemakers
- Total Procedures
- No Procedures

CABG = coronary artery bypass graft; CHF = congestive heart failure; ICD = implantable cardioverter defibrillator; PTCA = percutaneous transluminal coronary angioplasty. Sources: Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014. Specifics: Analysis uses data from the Sg2 National Demand Forecast application (v14 IoC) accessed 8/5/14.
...and the Average Length of Stay Increase

<table>
<thead>
<tr>
<th>Procedure</th>
<th>2014 ALOS</th>
<th>2019 ALOS</th>
<th>2024 ALOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Procedure</td>
<td>3.50</td>
<td>3.69</td>
<td>4.13</td>
</tr>
<tr>
<td>Minor Therapeutic</td>
<td>5.59</td>
<td>5.91</td>
<td>6.65</td>
</tr>
<tr>
<td>Pacemaker/ICD</td>
<td>5.14</td>
<td>5.41</td>
<td>6.00</td>
</tr>
<tr>
<td>Diagnostics</td>
<td>4.99</td>
<td>5.28</td>
<td>5.91</td>
</tr>
<tr>
<td>Cardiac Catheterization</td>
<td>5.72</td>
<td>6.06</td>
<td>6.80</td>
</tr>
<tr>
<td>Mechanical Ventilation</td>
<td>5.85</td>
<td>6.19</td>
<td>6.96</td>
</tr>
<tr>
<td>Major Therapeutic</td>
<td>17.12</td>
<td>18.92</td>
<td>24.50</td>
</tr>
<tr>
<td>PTCA</td>
<td>6.71</td>
<td>7.40</td>
<td>9.33</td>
</tr>
<tr>
<td>Other Vascular Procedures</td>
<td>9.59</td>
<td>10.49</td>
<td>13.15</td>
</tr>
<tr>
<td>CHF Total</td>
<td>4.63</td>
<td>5.08</td>
<td>6.24</td>
</tr>
</tbody>
</table>

ALOS = average length of stay.
Sources: Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
Specifics: Analysis uses data from the Sg2 National Demand Forecast application (v14 IoC) accessed 8/5/14.

Low severity gets culled out; high severity drives ALOS up.
**Service Line Planning: Find Growth Outside the Hospital**

**Forecast by Procedure Group, 2014–2024**

- **Visits—Evaluation and Management**
  - Diagnostics: 24%
  - Post-Acute Services: 32%
- **Standard Imaging—U/S**
  - Visits—Emergent: 46%
- **Standard Imaging—X-ray**
  - Rehab: 2%
  - Procedures—Minor: 28%
  - Procedures—Major: 44%
- **Standard Imaging—Nuclear Med/SPECT**
  - Visits—Urgent: 45%
  - Advanced Imaging—CT: 10%

**10-Year Forecast**

CHF doesn’t go away; it is seen elsewhere in the System of CARE.

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**SOURCES:** Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.

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Agenda

Introduction to Demand Forecasting
Demand Forecasting Deep Dive: Women’s Health
Demand-Driven Revenue Planning
Advanced Growth Metrics
IP Women’s Services Remain Flat; OP Offers Growth

Inpatient OB and Gyn Growth Rates
US Market, 2014–2019

<table>
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<th>Sg2 IP Forecast</th>
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<tr>
<td>Obstetrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nonmalignant Gyn</td>
<td>2%</td>
<td>8%</td>
</tr>
<tr>
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<td>Sg2 IP Forecast</td>
<td>Sg2 OP Forecast</td>
</tr>
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<td></td>
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IP 5-YEAR HIGHLIGHTS
• C-Section Rate: Decline from 34% to 29%

Outpatient OB and Gyn Growth Rates
US Market, Exclude E&M Visits, 2014–2019

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<td>Sg2 OP Forecast</td>
</tr>
<tr>
<td></td>
<td>2%</td>
<td>8%</td>
</tr>
</tbody>
</table>

OP 5-YEAR HIGHLIGHTS
• Gyn Surgery: Increase by 9%
• OB Ultrasound: Decline by 1%

Note: Excludes 0–17 age group. Outpatient service line growth excludes E&M visits. OB ultrasound includes Level 1 and Level 2. Gynecologic surgery is nonmalignant only and defined by major procedures. Gyn = gynecology.
Sources: Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
Expect Decreases in Variation and Declines in Overall C-Section Rates

C-Section Rate, 2013

Amniocentesis Volumes Will Be Obliterated

Invasive Fetal Diagnostics Forecast
US Market, 2014–2019

IMMEDIATE
- Declines in invasive fetal diagnostics and NT scans
- Reinforcement of MFM as consults

FUTURE
- Additional genetic signatures for anomalies
- Applications beyond obstetrics

Note: Excludes 0–17 age group. Obstetrics service line, invasive fetal diagnostics procedure. NT = nuchal translucency; MFM = maternal-fetal medicine.
Sources: Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
Expect Declines in Neonatology Volume

Neonatology Forecast
US Market, 2014–2024

Sources: Impact of Change® v14.0, NIS; Sg2 Analysis, 2014.
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Gynecology Continues to Shift to Outpatient

**IP and OP Gyn Surgery, Adults**

US Market, 2014–2019

**IP and OP Gyn Surgery, Adults**

US Market, 2014–2019

- **Gyn Onc** includes uterine cancer, ovarian cancer and cervical cancer, including precancer.

**Note:** Includes major procedures for OP services; major and minor for IP.

Volumes rounded to nearest thousand. Excludes 0–17 age group. PFD = pelvic floor disorder; Onc = oncology.

**Sources:** Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
Pelvic Floor Disorders Expect Strong Growth Across the Continuum

Pelvic Floor Disorders Forecast, Select Procedures
US Market, Adults, 2014–2024

<table>
<thead>
<tr>
<th>Procedure</th>
<th>2014 National Volumes</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP PFD</td>
<td>123K</td>
</tr>
<tr>
<td>E&amp;M Visits</td>
<td>1.8M</td>
</tr>
<tr>
<td>Urodynamic Testing</td>
<td>535K</td>
</tr>
<tr>
<td>Major Procedures</td>
<td>322K</td>
</tr>
<tr>
<td>Minor Procedures</td>
<td>293K</td>
</tr>
<tr>
<td>Imaging</td>
<td>272K</td>
</tr>
<tr>
<td>PT/OT</td>
<td>151K</td>
</tr>
</tbody>
</table>

**Note:** Analysis excludes 0–17 age group. OT = occupational therapy; PT = physical therapy.

**Sources:** Impact of Change® v14.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2014.
Many Factors Drive Future Mammography Volume

Screening Mammography Growth by Impact Factor
2014–2024

- Population growth
- Economic recovery
- Cost-sharing elimination
- Coverage expansion

- Screening guidelines (e.g., biennial screening ages 50–74)
- Risk-based screening algorithms

Sources: Impact of Change® v14.0; PharMetrics; CMS; Sg2 Analysis, 2014.
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# E&M Wellness Visits by Age and Specialty, Adult Women
Sample Market, Q1–Q4 2013

<table>
<thead>
<tr>
<th></th>
<th>OB/GYN</th>
<th>Primary Care</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>18–44</td>
<td>55%</td>
<td>32%</td>
<td>13%</td>
</tr>
<tr>
<td>45–64</td>
<td>42%</td>
<td>47%</td>
<td>12%</td>
</tr>
<tr>
<td>65+</td>
<td>26%</td>
<td>62%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**Note:** Ambulatory Market Share blinded sample market, estimations based upon physician reported specialties. Excludes 0–17 age group. Numbers may not equal 100% due to rounding. Used care family exam including screening and unspecified visit. **Sources:** Health Intelligence Company, LLC; Sg2 Ambulatory Market Share v1.0; Sg2 Analysis, 2014.
Agenda

Introduction to Demand Forecasting
Demand Forecasting Deep Dive: Women’s Health
**Demand-Driven Revenue Planning**
Advanced Growth Metrics
### Scenario Planning: Sample Impact Factor Modification

<table>
<thead>
<tr>
<th>Sg2 Impact Factor</th>
<th>Questions to Answer via Modification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>• What if a large employer entered/Exited the market?</td>
</tr>
<tr>
<td>Economics</td>
<td>• What if the timing of the economic recovery is delayed/expedited in our state?</td>
</tr>
<tr>
<td>Policy</td>
<td>• What if coverage expansion is delayed in our market?</td>
</tr>
<tr>
<td></td>
<td>• What if coverage expansion has already been fully realized in the market?</td>
</tr>
<tr>
<td>Systems of CARE</td>
<td>• What if we believe we will shift more/fewer patients to observation than Sg2 projects due to protocols and payment?</td>
</tr>
<tr>
<td>PAAs</td>
<td>• What if we choose not to focus on reducing potentially avoidable admissions for five years?</td>
</tr>
</tbody>
</table>
Determine the Levers to Pull

SAMPLE ORGANIZATION DESCRIPTION

- Large community hospital
- 85% market share for inpatient services
- Market holding at a strong FFS system

IMPACT FACTOR MODIFICATION

- Executive leadership determined no action will be taken on reducing PAAs until payment aligns.
- Strategic planning team wants to plan for a mitigated impact of PAAs.

INPATIENT ANALYSIS

- “Turn off” PAA impact factor.
- Mitigate or delay PAA impact factor.

Sg2 Forecast, Sample Organization 2013–2023

- Econom = economy; Epidem = epidemiology; FFS = fee-for-service; Innov & Tech = innovation and technology; PAA = potentially avoidable admission; Pop = population; Readm = readmission; SoC = System of CARE.
Scenario Planning: “What If” Hospital A Forms Narrow Network With Payer A and B

Individual Exchange Market

Prescenario | Scenario
---|---
Payer A | 30.9% | 28.8%
Payer B | 13.4% | 28.5%
Payer C | 24.9% | 8.2%
Payer D | 13.8% | 13.8%
Payer E | 8.8% | 11.4%
Other | 8.8% | 6.2%

Note: HIX narrow network scenarios are modeled separately for individual exchanges and small group exchanges. The data shown is for illustration purposes only.

Scenario net revenue refers to the incremental net revenue for Hospital A from HIX after discount pricing.

Source: Sg2 HIX Data Request Survey and Interviews With Local Managed Care Team, 2013.

COMMERCIAL DISCOUNT RATES

<table>
<thead>
<tr>
<th>Provider</th>
<th>Payer A</th>
<th>Payer B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital A</td>
<td>–15%</td>
<td>–25%</td>
</tr>
</tbody>
</table>

NETWORK STEERAGE

<table>
<thead>
<tr>
<th>Provider</th>
<th>Payer A</th>
<th>Payer B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital A</td>
<td>65%</td>
<td>72%</td>
</tr>
</tbody>
</table>

HIX Market Share Impact

Prescenario Net Revenue: $33M

Scenario Net Revenue: $40M

55% Competitors
45% Hospital A
33% Competitors
67% Hospital A

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Leaders Must Measure Growth in New Ways as Conventional Growth Strategies Lose Power

Measurement Domains and Metrics

**MARKET AND PRODUCT POSITION**
- Ambulatory market share
- Growth rate above market average
- Use rates relative to the market
- Share of Care™
- Network leakage

**ACCESS CHANNEL VITALITY**
- Unique patient counts
- Primary care strength scorecard
- Avoidable ED visits
- Evidence-based screening volumes

**FINANCIAL SUSTAINABILITY**
- Revenue quality
- Percent of revenue from novel sources
Think Like an Investor: Assess the Revenue Diversification of Your Portfolio

**FINANCIAL SUSTAINABILITY**

**Revenue Quality**

Sample Health System: Revenue Sources by Site of Care

<table>
<thead>
<tr>
<th>Site</th>
<th>2012 Revenue Distribution</th>
<th>3-Year Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Acute Care</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hospital</td>
<td>40%</td>
<td>55%</td>
</tr>
<tr>
<td>IP and OP</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Community-Based Care</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MD Office</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Diag/Imag Center</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Amb Proc Center</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Retail/Urgent Clinic</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td>40%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Post-Acute Care</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SNF</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>OP Rehab</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Home Care</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Amb Proc = ambulatory procedure; Diag/Imag = diagnostic imaging.

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Moving Quickly to Risk-Sharing Arrangements? Think Use Rates, Not Days and Discharges

MARKET AND PRODUCT POSITION

Use Rates Relative to the Market

Sample Data: Local and Regional Markets

<table>
<thead>
<tr>
<th>USF RATF PER 1,000</th>
<th>HFAI TH SYSTEM</th>
<th>COMPETITOR A</th>
<th>COMPETITOR B</th>
<th>MARKET</th>
<th>REGION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions</td>
<td>55</td>
<td>58</td>
<td>59</td>
<td>57</td>
<td>59</td>
</tr>
<tr>
<td>Days</td>
<td>180</td>
<td>189</td>
<td>194</td>
<td>188</td>
<td>192</td>
</tr>
<tr>
<td>ED Visits</td>
<td>165</td>
<td>173</td>
<td>178</td>
<td>172</td>
<td>176</td>
</tr>
<tr>
<td>Advanced Imaging</td>
<td>220</td>
<td>231</td>
<td>238</td>
<td>230</td>
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Sg2 is the health care industry’s premier provider of market data and information. Our analytics and expertise help hospitals and health systems understand market dynamics and capitalize on opportunities for growth.

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