

A New Era for Healthcare

2024 INSIGHTS AND OPPORTUNITIES

Exploring key insights and opportunities for the US healthcare provider market for 2024 and the years ahead.

AMBULATORY GROWTH

The battle for consumer loyalty and share-of-wallet will be waged across the ambulatory perimeter, including both traditional and digital access points.

THE FUTURE

Consumer-centric model
Financial performance moves from the hospital to ambulatory, particularly JVs

THE PRESENT

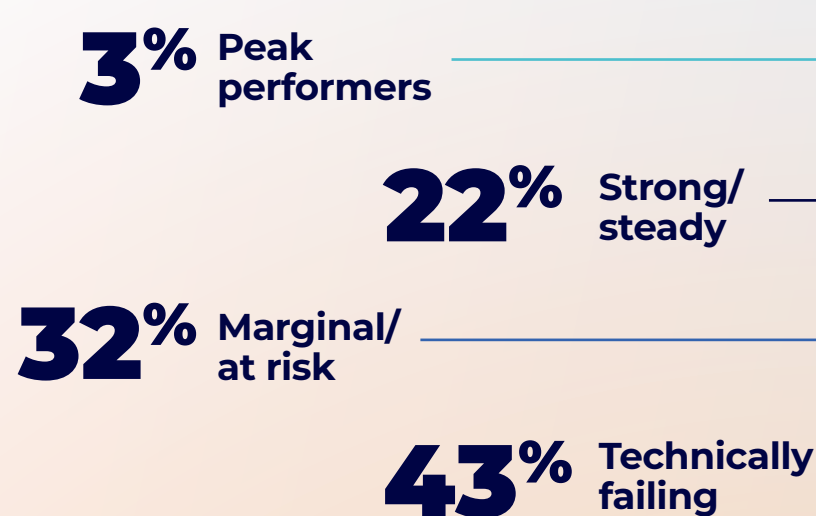
Provider-centric model
Financial performance driven by acute care and HOPD volumes

THE PAST

Hospital-centric model
System financial performance driven by acute care engine

FINANCIAL PRESSURES

Industry financial pressures will continue to stress provider organizations absent transformative change. ECG's Financial and Operational Health Index shows US hospitals continue to struggle.



VALUE-BASED CARE

The march toward "value" will continue, slowly; payers prefer to marginalize high-cost providers vs. risk sharing on the premium dollar.

The largest payers are 10 times the size of the largest health systems. Providers must secure tactical wins in reimbursement and be agile in negotiations.

ORGANIZATIONAL SCALE

The need for organizational scale will continue to reshape the provider landscape in the decade ahead.

Top factors driving healthcare M&A:

- + Market scale and competitive positioning
- + Balance sheet strength
- + Access to clinical program breadth/depth
- + Geographic reach/referral network expansion
- + Industry convergence
- + Declining reimbursement

CHARTING A COURSE

Opportunities that healthcare organizations must grasp to succeed:

SECURE REAL VALUE IN THE PHYSICIAN ENTERPRISE

LEAD IN AMBULATORY OR BE LEFT BEHIND

TURN SCALE INTO COMPETITIVE ADVANTAGE



CLICK BELOW TO LEARN MORE

ASC Joint Ventures

Ambulatory Patient Access

Provider Workforce Planning

Effective Models for Care Redesign

Insights into Health Equity

Partnership and Affiliation Strategies

Insights into New Trends in M&A

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