



# Market Disruptors

*FutureScan Exercise for Senior Leaders*

Table discussion handouts

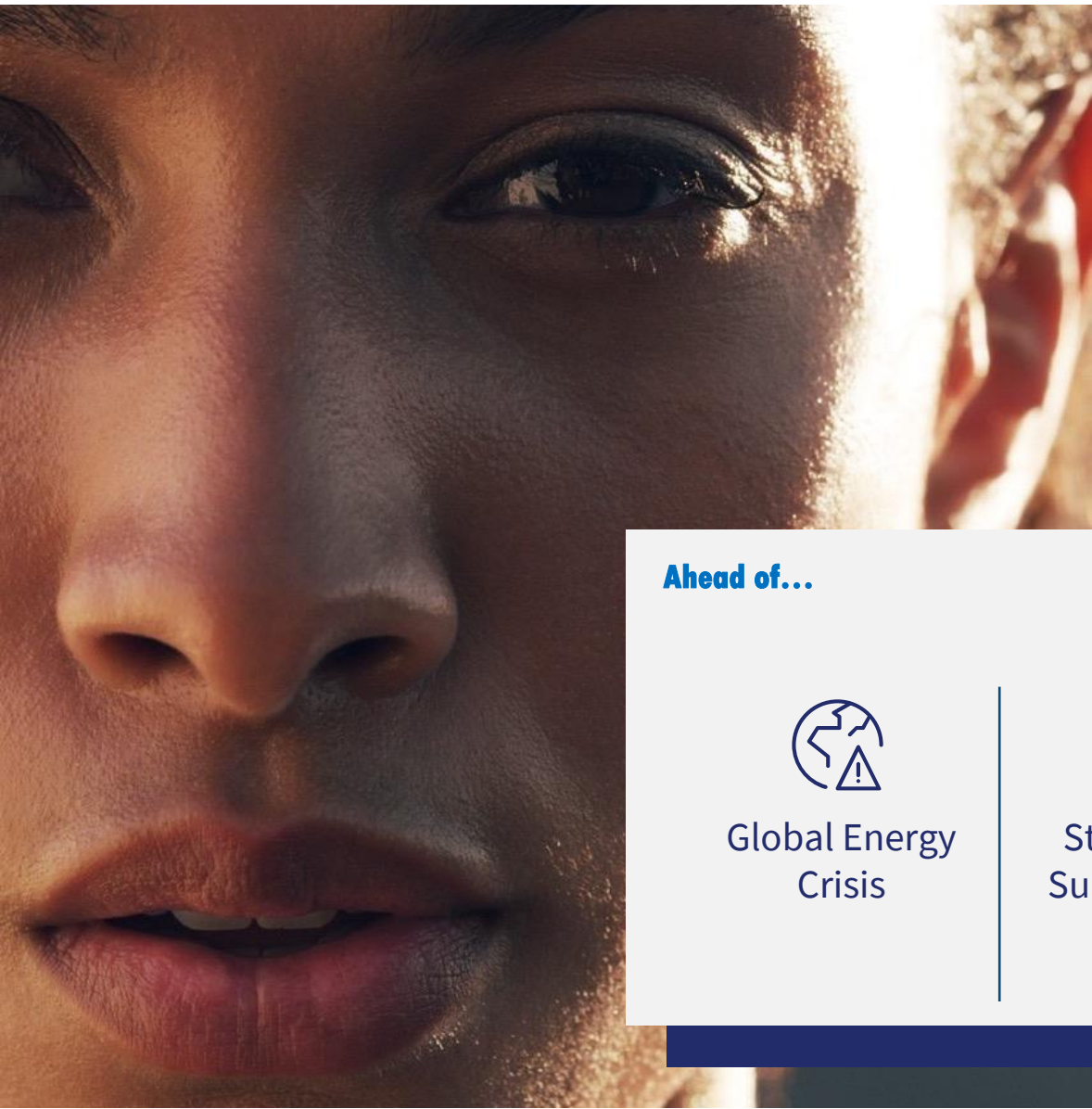


# 1

## Setting the Stage...



## Market Disruption & Healthcare Implications



# Fortune 500 CEOs cite talent and skills shortages as the **single biggest threat** to their business today

## Ahead of...



Global Energy  
Crisis



Stresses on  
Supply Chain



Security  
Threats



Inflation



Changing  
Customer  
Expectations





# There are Multiple Trends in the Health Industry With Talent Implications

## Looking Ahead...

Shortage of clinical staff due to employee Stress, burnout and resignations

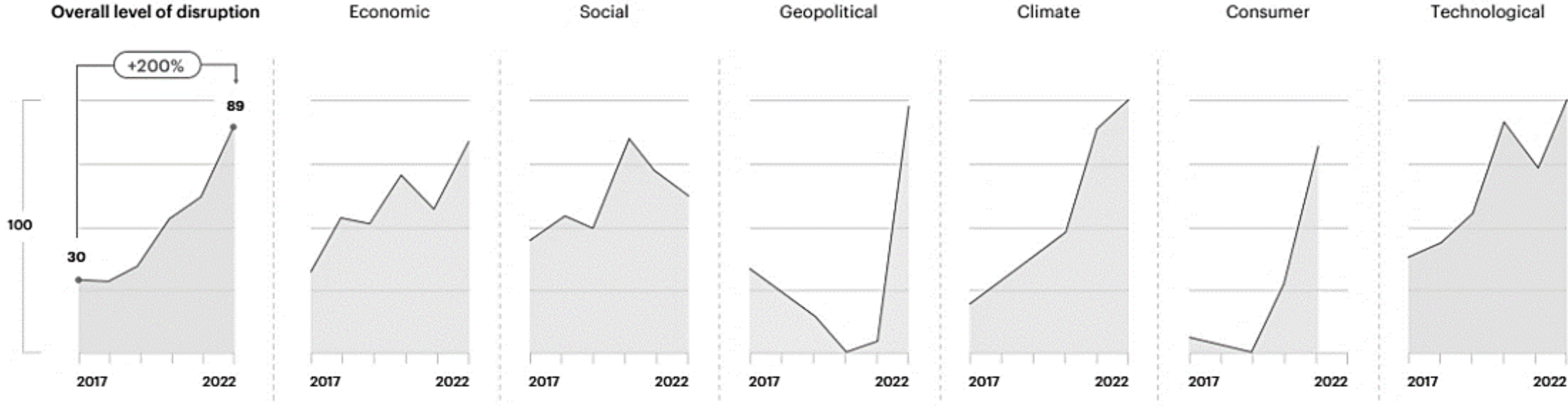
A push to reinvent Care Access and Delivery

Utilization of AI, Cloud and Metaverse capabilities to reinvent care access and delivery



# Impacts of Disruption In Recent Years

Disruption in multiple areas has increased significantly over the past five years



Source: Accenture Global Disruption Index. Each sub-component is based on a set of indexed scores of a set of indicators. 2022 data is YTD.

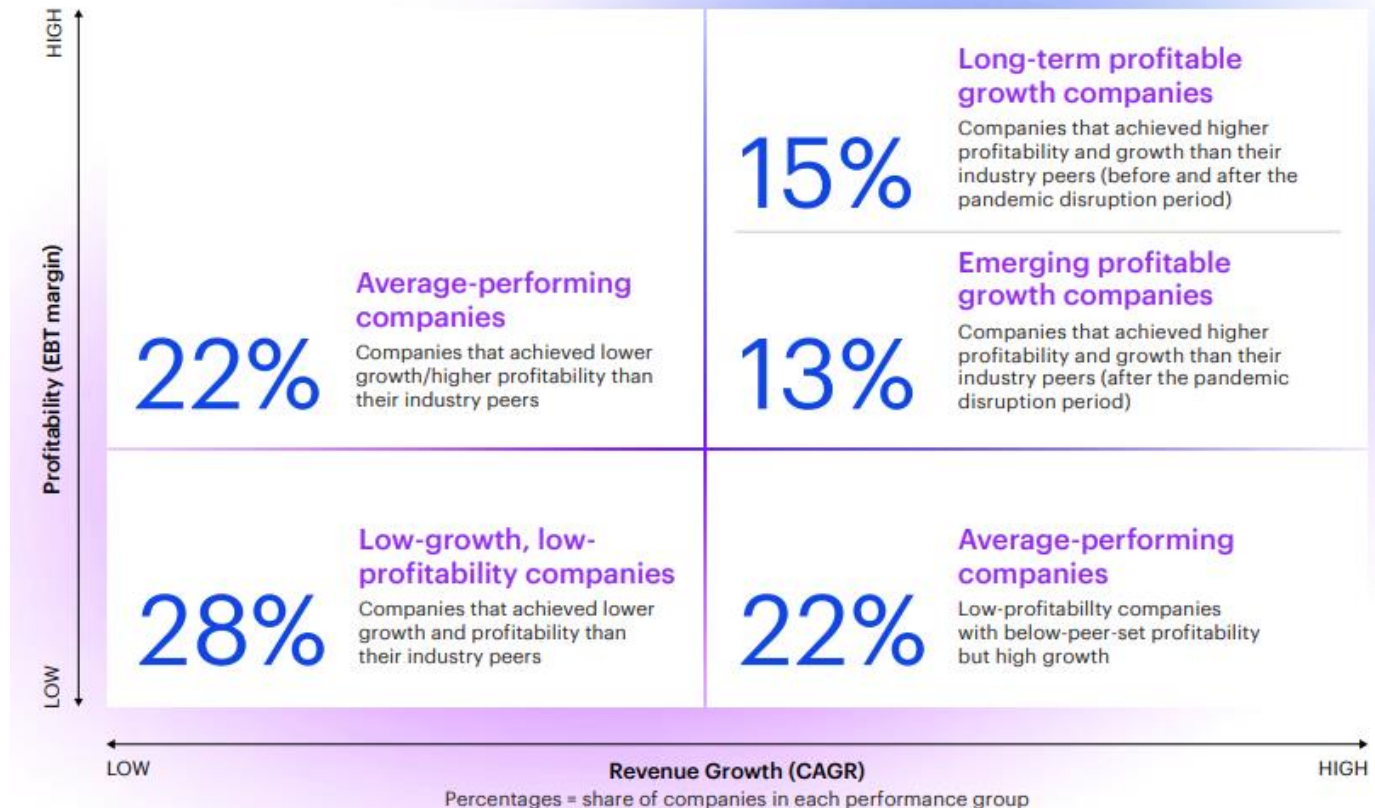


# Impacts of Disruption In Recent Years (Cont'd)

Segmenting companies based on revenue growth and profitability (2017 – 2022) revealed five performance groups

We asked 4 key questions...

1. What are the characteristics of enterprises that consistently report growth in revenue and profitability?
2. What capabilities matter most? And how do those critical capabilities differ from one industry to another?
3. How do leaders adapt to—and emerge from—disruptions?
4. What role does digital transformation play in establishing durable performance?



**Notes:** Revenue growth is CAGR since disruption (Q4 2019) and profitability is the ratio EBIT/revenues over the last four quarters. For Financial Services companies we took the ratio EBT/revenues. Revenues, EBIT, and EBT are in USD.

Source: Accenture Research analysis of 1,615 global public companies

# Organizations will focus its transformation efforts on costs, sustainability and clinical care team structures

Where do you anticipate your organization will focus most of its transformation efforts over the next 3 years? Select up to three.

	Sample	Health System	Stand-Alone Hospital	CFO	VP Finance
Cost transformation & margin improvement	51%	50%	53%	51%	51%
Sustainability	39%	43%	30%	37%	41%
Clinical care team structures	38%	43%	27%	37%	39%
Organizational and operating model	37%	41%	27%	39%	35%
Data and analytics	36%	33%	43%	35%	37%
Diversity, equity, inclusion	32%	29%	40%	35%	29%
Enterprise business applications (e.g., Cloud, AI)	27%	26%	30%	22%	33%
M&A, partnerships, alliances	20%	21%	17%	20%	20%



# Table Discussion—Healthcare Disruptors

**Put yourself in the shoes of a disruptor.** You are a strategy leader or executive decision-maker at an organization representative of the disruptor assigned to your table. Evaluate the opportunity your strategy is designed to pursue.

- What is the strategy (in one sentence)?
- Why does this opportunity exist? What are the market conditions that make this a no-regrets move for you as the disruptor?
- What could get in the way of this strategy succeeding? How will other market players react?

**Now put the hat on you wear today.** What recommendation would you give to your senior leadership about this potential disruption?

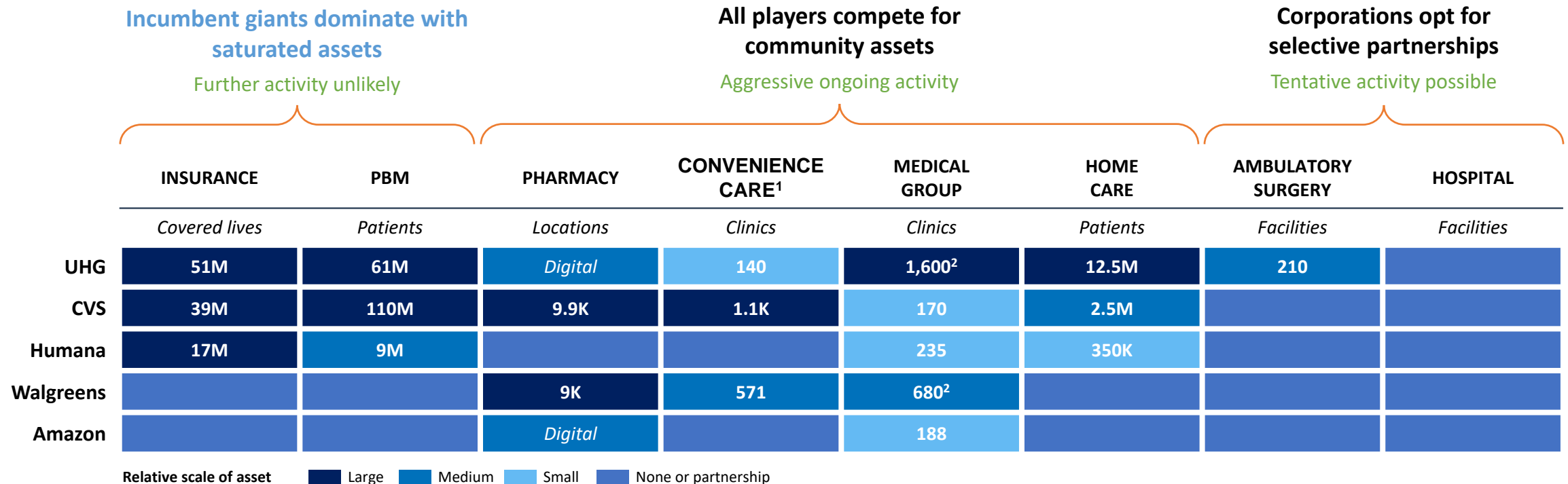
- Does your organization have an opportunity to do something interesting for the market need the disruptor has identified?
- What should your organization be doing differently?



# Appendix - Handouts

# Disruptor—Diversifying Helathcare Giants

The big five **healthcare ecosystems** (OptumCare, Amazon, Walgreens, CVS, and Walmart) have a market cap of \$2T. They have hired thousands of clinicians and amassed assets for offering on-demand and convenience care, home health, digital consumer platforms, and PBMs.



# Disruptor—New Physician Employers

**New physician employers**—In 2022, for the first time, the percentage of physicians employed by hospitals roughly equaled the percentage employed by corporate entities. Persistent physician burnout has resulted in more than half of physicians considering career changes. New competitors (telehealth companies, ChenMed, OneMedical, retail providers, private-equity and payer-backed superpractices) are creating new employment norms, including greater physician autonomy, flexible work, and compensation security.

9%

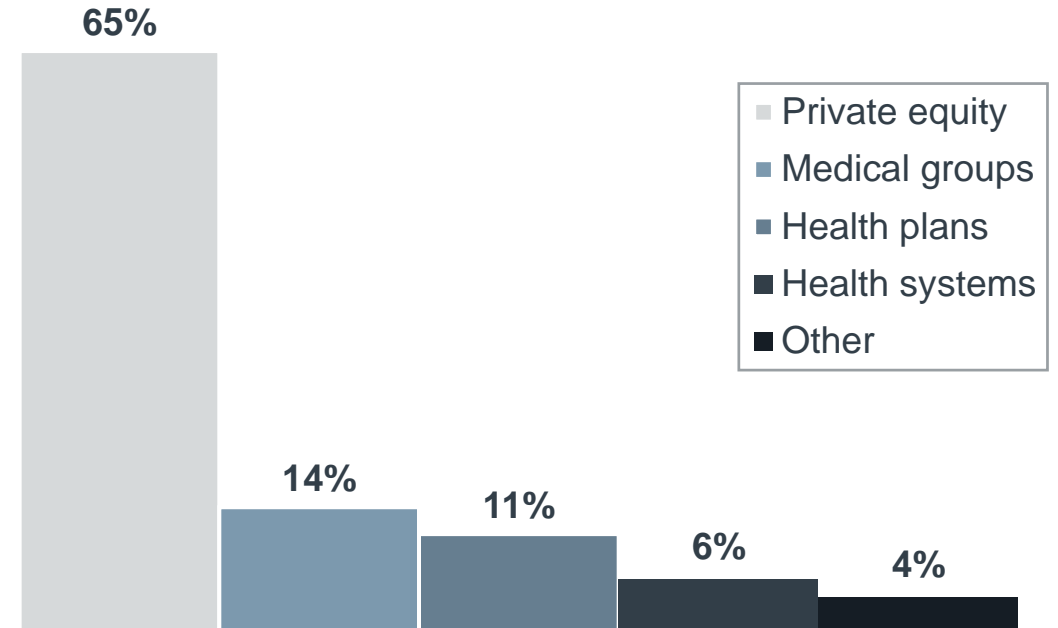
increase in **hospital-owned** practices in three years

86%

increase in **corporate-owned** practices in three years

Percentage of acquired physicians by funder type, 2019-2023

Source: AHA



# Disruptor—Purchaser-managed Patient Navigation

## Purchasers navigating patients—

Looking for new ways to manage rising health care costs, more health plans and self-insured employers are directly managing patient navigation. Price transparency regulations give employers unprecedented access to data on contracted prices. Third parties and start-ups are also creating offerings for purchasers that capitalize on these data. As a result, more payers will direct patients to specific providers for both primary and specialty care through centers of excellence programs, virtual offerings, and other services.

- Source: “2023 Large Employers’ Health Care Strategy and Plan Design Survey,” Business Group on Health, August 2022.

## Large employer benefit strategy offerings

n=135 large employers, covering over 18M lives

Offered in 2023    Planning to offer in 2024/2025

