

Current research agenda for strategy leaders

Topic	What we're researching	Why it matters
State of the industry	<ul style="list-style-type: none"> What are the shifts shaping the policy environment, utilization patterns, and coverage mix? Which of these are temporary and which are structural? How will increased competition and changing power dynamics impact the hospital business model, care delivery networks, specialty pharmacy, and data as a strategic asset? 	<ul style="list-style-type: none"> The healthcare industry is in a period of recalibration. Organizations are revisiting how they prioritize topline growth relative to their ability to secure sustainable margins, pivoting their business strategies accordingly – and altering the traditional power dynamics and relationships within our industry.
Health system growth and ambulatory strategy	<ul style="list-style-type: none"> What are the actionable goals of an ambulatory strategy? What wider enterprise or growth ambitions do they serve? What gaps in execution emerge from researching on-the-ground experiences? What are characteristics of a successful ambulatory strategy? How do we ensure we have them in ours? 	<ul style="list-style-type: none"> Many health systems skip straight from assessing their market opportunity to operating ambulatory sites of care. They don't consider overall design or purpose of an ambulatory network because of a disproportionate focus on inpatient care, urgent market forces, or a lack of internal readiness and systems.
Value-based care	<ul style="list-style-type: none"> Which health systems are actually successful in VBC? What makes that success possible? 	<ul style="list-style-type: none"> Many health system leaders hesitate to deepen their VBC commitment, citing a lack of consistently successful examples. But our research has identified effective models worth emulating.
Service line trends, strategy, and governance	<ul style="list-style-type: none"> What are the growth projections and disruptive innovations shaping specialty care markets, including oncology, cardiovascular, orthopedic, infusion, maternal and reproductive health, and digestive health? How are health systems changing their service line structures? What new objectives are driving these changes? What are realistic ambitions for service line transformation? Are providers realizing ROI from changes, or is the service line model becoming antiquated as more patients cut across multiple service lines? 	<ul style="list-style-type: none"> Despite rising volumes, health systems are facing margin pressures that are likely to continue based on structural shifts in the patient population and payment landscape. Health systems rely on service lines to drive revenue and margin growth and subsidize unprofitable but essential community services. Most health systems are prioritizing the same service lines that are the most likely to drive profitability but also can be difficult to differentiate. Strategy leaders are responsible for strategically growing volumes, revenue, and margin but are often preoccupied by operational “fires” like workforce issues and capacity constraints.
2025 Outlook on health system capital planning and spending	<ul style="list-style-type: none"> What are health systems spending their money on and why? How have capital budgets changed since last year? How do health system leaders make decisions about capital spending priorities? What are the main barriers to effectively sourcing and allocating capital across various priorities? 	<ul style="list-style-type: none"> Strategy leaders need to benchmark their capital planning to understand what peer systems are planning to do with their financial position and access to capital and where they are betting on growth.