Roland Berger Hospital Study 2023

More outpatient and technology-driven in future

„Networked, outpatient, AI-supported: How Germany's hospitals see their future", is the title of the management consultancy Roland Berger's Hospital Study 2023 (1), prepared by Peter Magunia, MD, and Janes Grotelüschen, Senior Partner and Partner at Roland Berger. For the current edition of the study, managing directors and medical directors of the 600 largest hospitals in Germany were surveyed, with the participants representing the entire spectrum of the hospital landscape on the basis of turnover, number of employees, number of beds, ownership and the various levels of care. Above all, it becomes clear that, despite further deteriorating profitability, many of those responsible have recognised the signs of the times and are now in the process of realigning their hospitals, above all in a more outpatient and technology-driven way.

>> As in previous years, the survey on the state of German hospitals provides up-to-date figures on their economic situation. And once again it becomes clear: according to the respondents, profitability has further deteriorated in most cases. Added to this are uncertainties in financing, challenges due to the shortage of skilled workers and inpatient service slumps, which are once again burdening the hospitals. Nevertheless, according to the two study authors, a trend reversal is discernible with regard to the assessment of the economic prospects, as many hospitals are in the process of realigning themselves and preparing themselves for a future in a strongly changed competitive environment in a much more outpatient and technology-driven manner.

The starting position is rather difficult, since according to the study the annual results of the hospitals have known only one direction for years: further and further into the red. Little has changed in this regard in the past year 2022. Whereas in last year's study about one third of the participants had indicated a loss for their hospitals in 2021, the proportion had already risen to more than half (51%) in 2022. At 63%, hospitals in public ownership were particularly hard hit. And viewed across all owners, only just under one in four clinics had achieved a positive annual result in the past year.

According to the respondents, the precarious economic situation affects small, medium-sized and large hospitals to the same extent. However, compared to 2021, the majority of small hospitals had also posted a deficit for the first time. According to the study, the most important causes of the tense financial situation include the shortage of staff, especially nursing staff, as well as uncertainties in financing, inflation-related rising prices and an increasing investment backlog in many facilities.

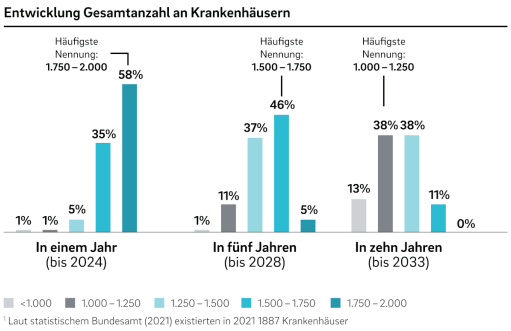
Naturally, the planned hospital reform is currently one of the top issues in the sector. Accordingly, this topic was also included in the Roland Berger survey by asking the participants to assess the effects of the reform at the beginning of May - thus at a time when the general political direction was known but no details were yet available (see MVF 03 and 04/23). The survey showed that the expectations of those in charge with regard to short-term relief are not particularly high. Only three percent expect the economic situation of their hospital to improve by 2024 as a result of the hospital reform. According to the cumulative information provided by the respondents, the short- and medium-term forecasts are even more pessimistic, especially among the smaller facilities. According to the study, only from 2028 onwards do those responsible expect relief effects from structural change in the hospital landscape, but also from efficiency gains in the course of digitalisation, for example through digital patient files, e-prescriptions or the increased use of telemedicine services.

In the view of the respondents, one consequence of years of negative development is inevitable: the number of hospitals in Germany will decline significantly. While there were still just under 1,900 hospitals in 2021, 51% of the participants expect the number to be no more than 1,250 in 2033. This corresponds to a decline of minus 34%. Accordingly, every third hospital would close. According to the results of the study, 13% of the experts still expect the number of hospitals to fall below 1,000. This would mean a decline of minus 47% - in effect, the end for almost every second hospital.

According to the respondents, however, the greatest decline is expected between 2028 and 2033. The reason for the predicted reduction is, in particular, the advancing outpatientisation, the shift from services previously provided on an inpatient basis to increasingly outpatient care. „The outpatientisation of the health care system represents a transformative change and requires a fundamental rethinking of existing structures," co-author Grotelüschen clarifies. Hospitals would now have to realign their resources, while the health care system will have to be completely reorganised. „The impending structural change is a great opportunity, because it opens up significant possibilities for German hospitals to provide

Prognose befragter Krankenhausmanager: Gesamtzahl deutscher Kliniken könnte bis 2033 stark sinken

Wie wird sich die Gesamtzahl der Krankenhäuser in Deutschland bis 2024, 2028 und 2033 entwickeln? [% der Nennungen]



[1] Laut statistischem Bundesamt (2021) existierten in 2021 1887 Krankenhäuser

Quelle Roland Berger

Anzahl Krankenhäuser nach Jahren

	Bis 2024	Bis 2028	Bis 2033
<1.000	1%	1%	13%
1.000 – 1.250	1%	11%	38%
1.250 – 1.500	5%	37%	38%
1.500 – 1.750	35%	46%	11%
1.750 – 2.000	58%	5%	0%

Höchst angegebener Mittelwert bis 2024, 2028 und 2033

Roland Berger

Citation

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future-proof healthcare and ushers in the path to networked and innovative medical care, writes Peter Magunia, MD, Senior Partner at Roland Berger, in his accompanying text on the recommendations for action that the management consultancy believes are now important for business leaders. According to the Roland Berger study, these are above all three points:

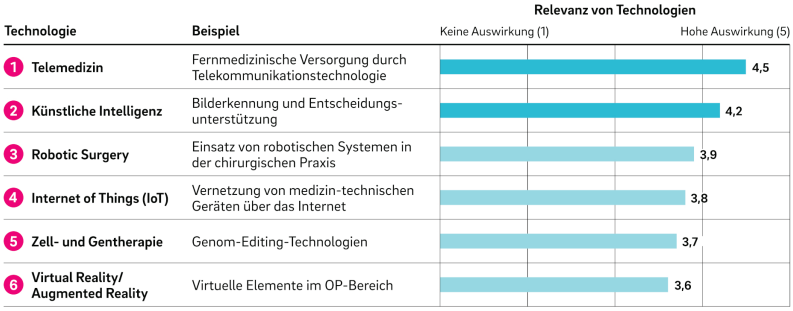
1. keep an eye on the important issues: Service providers face major challenges in the coming years: While they must ensure economic stability in the short term and address trends such as outpatientisation, AI or the shortage of skilled workers in a structured manner, they must not neglect long-term goals such as digitalisation. All aspects must be kept equally in view.
2. avoid conflicts of objectives: Some trends in the German healthcare system are currently difficult to reconcile. For example, an improved work-life balance for employees will hardly go hand in hand with an increase in the performance of hospitals in the short term. Potential conflicts of objectives must therefore be sensibly taken into account when assessing trends and deriving measures.
3. define strategic position in the ecosystem: Mergers could be a sensible further option for hospitals. For all houses, the aim should be to develop a strategic positioning within an ecosystem of networked healthcare providers. <<

by:
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1: https://t1p.de/vyrm9

Krankenhäuser bewerten insbesondere Telemedizin und künstliche Intelligenz als hoch transformative Technologien

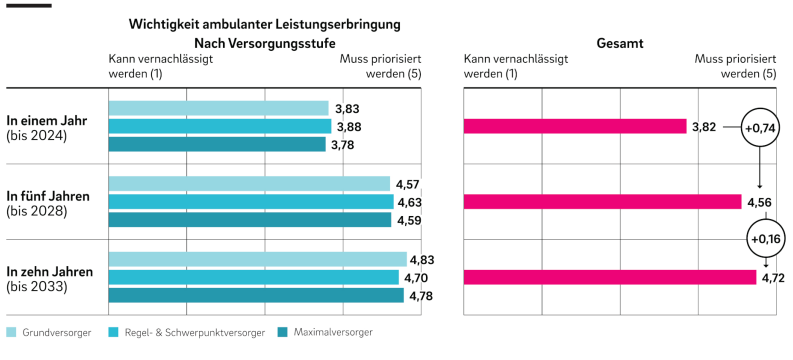
Bewerten Sie die nachfolgenden Technologien nach ihrer Relevanz im medizinischen Bereich (z.B. Diagnostik und Therapie) bis 2033 [Mittelwerte]



Quelle Roland Berger

Die ambulante Leistungserbringung gewinnt in allen Versorgungsstufen zunehmend an Wichtigkeit

Bewerten Sie die Wichtigkeit der ambulanten Leistungserbringung in den drei angegebenen Zeithorizonten [Mittelwerte]



Quelle Roland Berger

Fig. 1-3: From Roland Berger Hospital Study 2023.

Helios repositions itself in the outpatient sector

>> „We see and feel the movements in the German healthcare system to increasingly carry out treatments and interventions in the outpatient setting,“ says Robert Möller, CEO Helios, explaining his decision to have Helios‘ outpatient and inpatient facilities „work even more closely as equals and in close cooperation along common treatment paths“ in future.

Around 240 medical care centres (MVZs) belong to Helios Ambulant, Germany‘s largest provider of outpatient medicine under the Helios umbrella. Now the health care provider, which also operates 87 clinics in Germany, is repositioning itself in the outpatient sector. To this end, in addition to the existing medical consultants Prof. Dr. Rudolf Leuwer and Dr. Olaf Kannt, four further medical consultants will become active and represent the outpatient perspective: Dr Susanne Dörr, Prof. Dr Dr Stephanie Tritt, Prof. Dr Thomas Mairinger and Dr Peter Kranen. From now on, they will also be under the direct management of Möller. „In this way, we are doing justice to the increasing importance of outpatient medicine and promoting the symbiotic networking of outpatient and inpatient perspectives,“ emphasises Enrico Jensch, COO Helios. The current structural measure will make a significant contribution to achieving an even more common view of the patient in the sense of a continuous patient journey. In addition, this step will expand the number of medical consultants for Helios in order to „do even better justice than before to the qualitatively and quantitatively growing tasks in the medical world“ and to continue to „advance as an active designer of modern quality medicine“.

With the new structure, Helios aims to meet the requirements for qualitative, modern, digital and cross-sector healthcare even better. „With our digital, outpatient and inpatient offerings, we are ideally positioned to map treatments across sectors in the best possible way from the patient‘s perspective. With the new structure, we are creating even more transparency in the treatment pathways and allowing all medical authorities to collaborate and shape joint care. This is to the benefit of both those receiving and those being treated,“ Möller and Jensch agree. <<