



“It's not uncommon to have patients in their 40s. And, we're going to have the baby boomer population around for a while, which means we're going to have to live in both worlds.”

- CEO of independent heart and vascular institute

How to Adapt Your CV Care Strategies for a New Generation

“If we don't foster the culture of wellness, we will be left behind as the new generations look for that care elsewhere.”

- VP of cardiac services at private healthcare system

“The younger generations value protecting their time. They value spending time with family. The traditional schedule does not accommodate that.”

-VP of heart and vascular service line at academic medical center

I have nothing to disclose

Expected Outcome & Educational Need/Practice Gap

Expected Outcome & Educational Need / Practice Gap

Cardiovascular programs often invest for visibility rather than long-term strength, struggle to align workforce strategies with growth, and fail to fully engage the next generation of cardiologists. Limited collaboration further fragments care and resources.

There is a need to equip leaders with strategies that strengthen programs through purposeful investment, workforce alignment, generational engagement, and partnership development.

Expected Outcome

Participants will identify practical approaches to build sustainable, collaborative, and patient-centered cardiovascular programs.

What you'll learn today

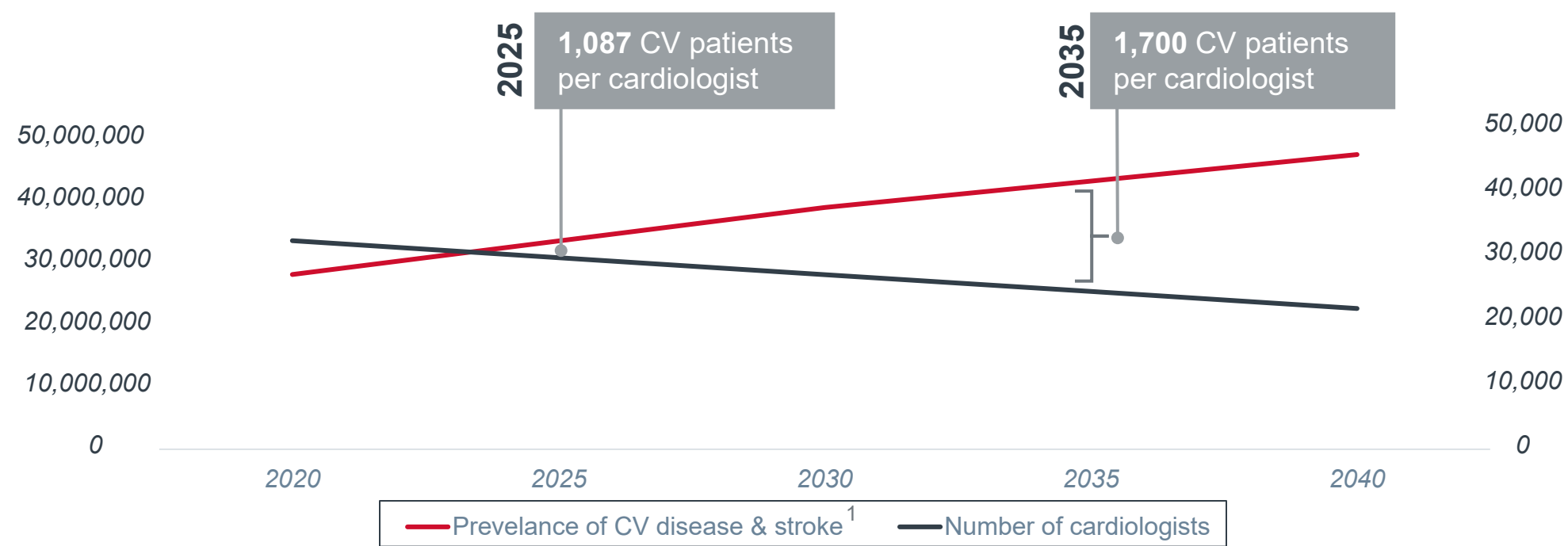
- 01 **Invest for strength** rather than for the perception of being "innovative."
- 02 **Leverage the strengths of the next generation of cardiologists**, rather than forcing them into the existing system.
- 03 **Align workforce and retention** strategies with growth plans.
- 04 **Partner to serve patients**, rather than doing it all alone.

01

A new generation with
new needs

CV supply and demand imbalance to intensify by 2035

A look at potential cardiovascular (CV) service demand and cardiologist supply
Projections from American Heart Association, American College of Cardiology, and MedAxiom



1. Maximum projection of total patients with coronary heart disease, heart failure, atrial fibrillation, or stroke

Sources: [Workforce in Crisis: Charting the Path Forward](#). ACC. June 2, 2023. Joynt Maddox, KE, et al. [Forecasting the Burden of Cardiovascular Disease and Stroke in the United States Through 2050—Prevalence of Risk Factors and Disease: A Presidential Advisory From the American Heart Association](#). AHA Journals. June 4, 2024.

Generational shift will impact patients and clinicians

The next 10 years will bring a changing of the guard in CV care.

CV patients in 2035:

Baby boomers will still make up the majority of CV patients, especially for medical services

Gen X and millennials are getting sicker, earlier and will demand more than generations before

Generation age in 2035

Baby boomers:
Ages 71-89

Generation X:
Ages 55-70

Millennials:
Ages 39-54

Generation Z:
Ages 25-38

Gen Alpha
Ages 11-24

CV clinicians in 2035:

Baby boomers will be mostly retired

Gen X will enter retirement age

Millennials and Gen Z will make up the majority of clinicians

Gen Alpha will enter med school

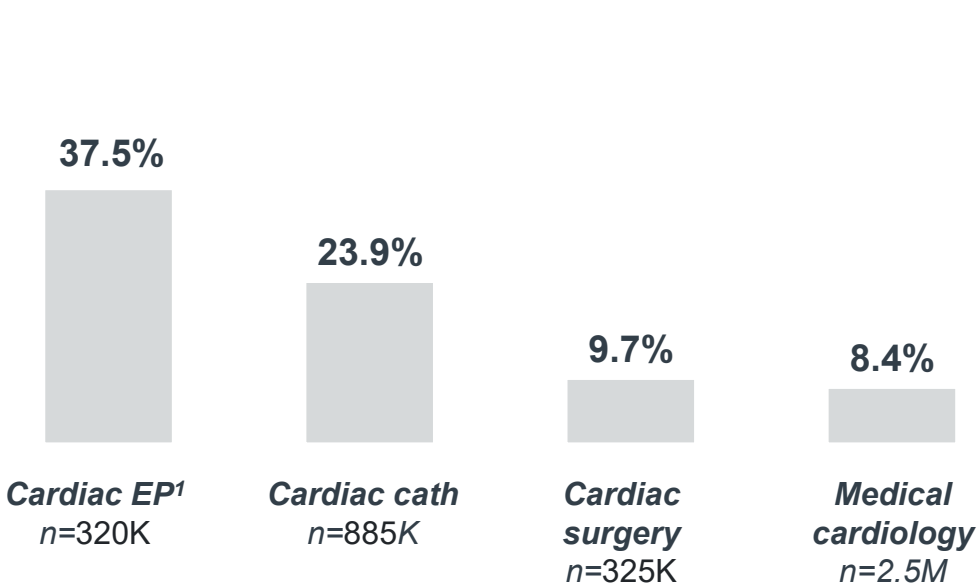
Source: Dimock, M. [Defining generations: Where Millennials end and Generation Z begins](#). Pew Research Center. January 17, 2019.

Inpatient and outpatient settings to see substantial CV growth

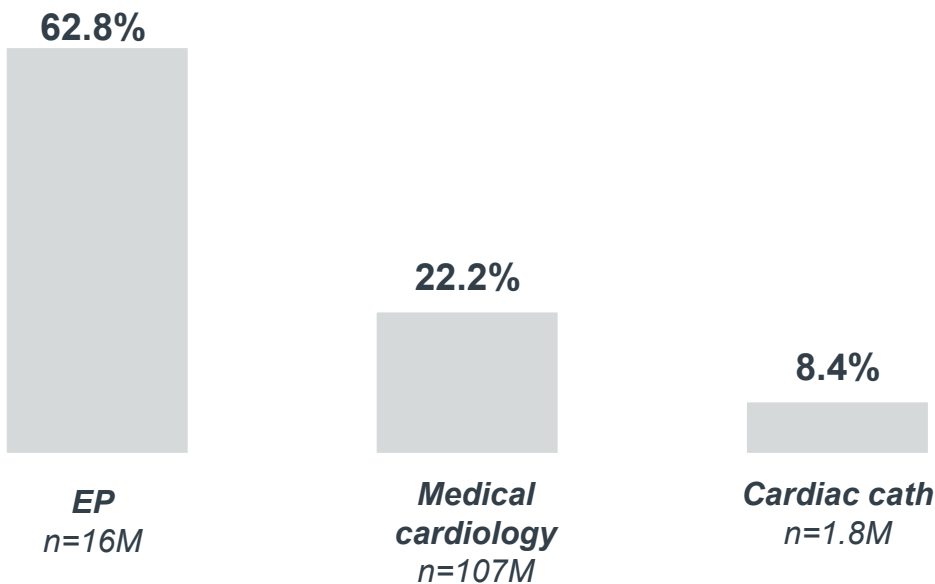
10-year volume growth rates for cardiology services

National estimates from Advisory Board's Market Scenario Planner tool, 2023–2033

Inpatient sub-service lines



Outpatient sub-service lines

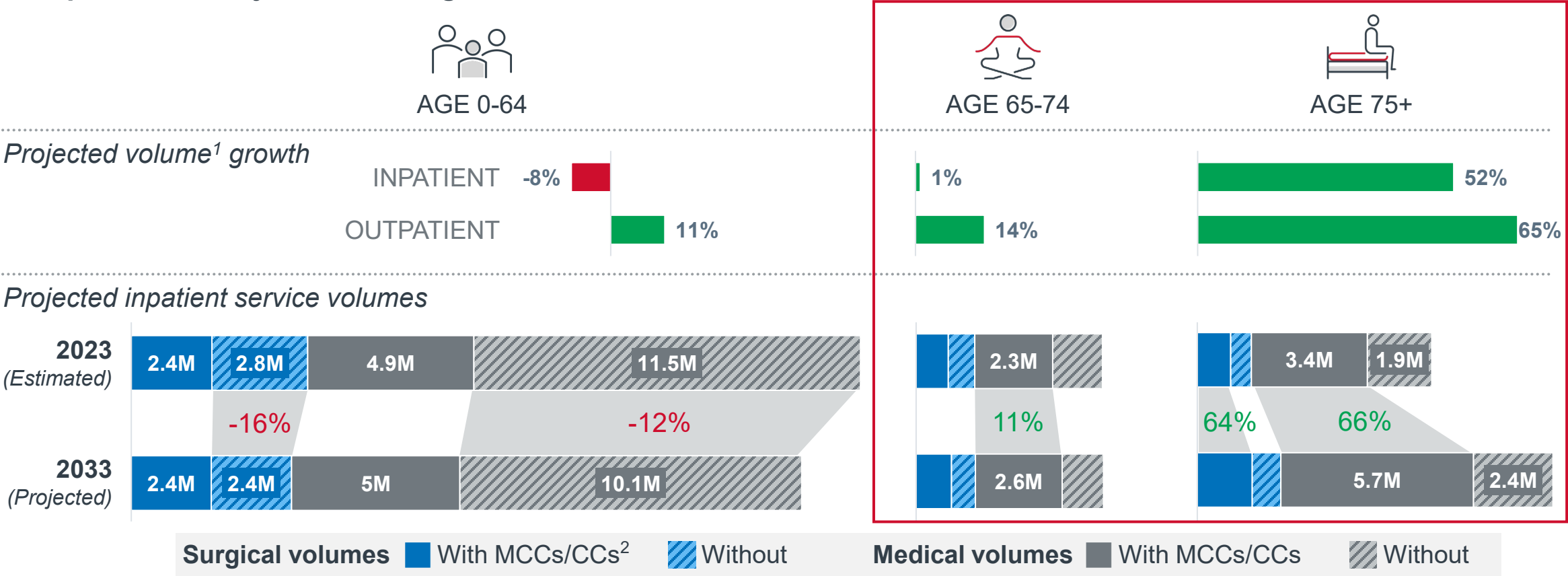


Use our [Market Scenario Planner tool](#) to see our five- to ten-year estimates of patient volumes and growth rates

1. EP: Electrophysiology.

Baby boomers will fill inpatient beds with complex cases

Comparison of major volume segments, 2023 to 2033



Surgical volumes

■ With MCCs/CCs² ■ Without

Medical volumes

■ With MCCs/CCs ■ Without

1. Excludes lab, evaluation & management, radiology, physical therapy & rehabilitation, and miscellaneous services.
2. Major complications or comorbidities (MCC) or complications and comorbidities (CC).

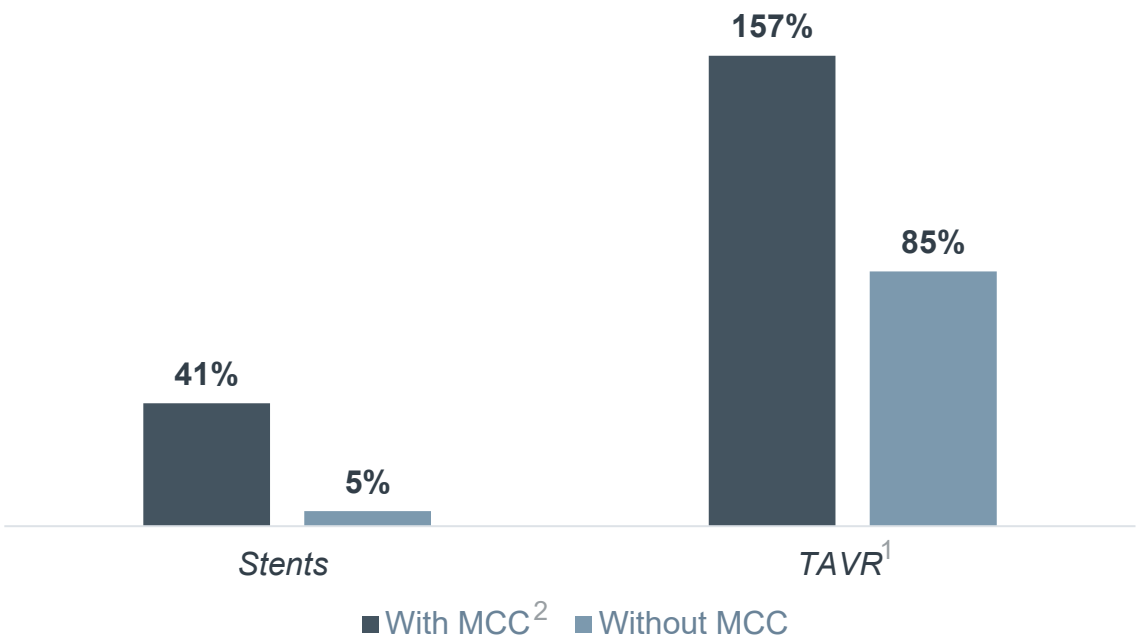
Source: [Market Scenario Planner](#). Advisory Board. Accessed August 9, 2024

Case mix shifts will be a hit to service line margins

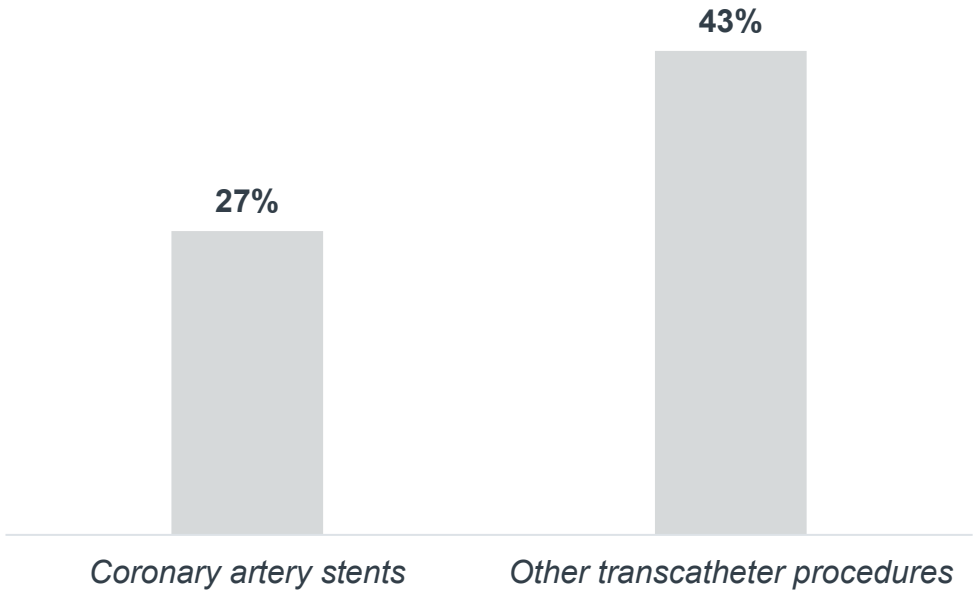
10-year volume growth rates for inpatient MS-DRGs and outpatient groupings

National estimates from Advisory Board's Market Scenario Planner tool, 2023-2033

Inpatient stent and TAVR growth



Outpatient stent and transcatheter procedure growth



1. TAVR: Transcatheter aortic valve replacement.
2. MCC: Major complications and comorbidities.

Source: [Market Scenario Planner](#). Advisory Board. Accessed March 12, 2025.

And demand more from their CV providers

Patients of tomorrow will have different preferences than the patients of today

Baby boomer preferences

- Value face-to-face care
- Quality over price
- Unlikely to break a referral
- Avoid travel at all costs



Gen X and millennial preferences

- Value convenience and efficiency
- Demand price transparency
- Shop for care
- Willing to travel for quality
- Prefer virtual visits

Source: Knickman, J and Snell, E. [The 2030 Problem: Caring for Aging Baby Boomers](#). *Pub Med*. August 2002: [How Consumers' Health Care Preferences Vary by Age](#), Advisory Board, Accessed January 17, 2025.

Gen X and millennials are getting sicker, earlier

Health declining among younger generations

8.2% Increase in prevalence of obesity among young adults ages 20-44 (2009 to 2020)

9x Relative increase in death from heart failure in patients <45 years old (2012 to 2021)

14% Increase in stroke rate in patients ages 18-44 (2011 to 2022)

Varying risk factors complicate CV care

Generation X:
Ages 55-70

More likely experience CV complications from:

- Smoking
- Unmanaged cholesterol

Millennials:
Ages 39-54

More likely to experience CV complications from:

- Obesity
- Lack of socioeconomic support

Sources: Martinson, ML, et al. [Generational Shifts in Young Adult Cardiovascular Health? Millennials and Generation X in the United States and England](#). J Gerontol B Psychol Sci Soc Sci. February 2022; Sayed A, et al. [Reversals in the Decline of Heart Failure Mortality in the US, 1999 to 2021](#). JAMA Cardiology. April 24, 2024; Aggarwal R, et al. [Cardiovascular Risk Factor Prevalence, Treatment, and Control in US Adults Aged 20 to 44 Years, 2009 to March 2020](#). JAMA. March 5, 2023; Zhao J, et al. [Global trends in incidence, death, burden, and risk factors of early-onset cancer from 1990 to 2019](#). BMJ Oncology. September 5, 2023; Imoisili OE, et al. [Prevalence of Stroke, Behavioral Risk Factor Surveillance System, United States, 2011-2022](#). CDC. May 23, 2024.

When demands aren't met, patients look to alternatives

Care avoidance is likely to grow as trust deteriorates among the younger generation

Those who think the healthcare system is failing are...

1.5x

More likely to follow advice from **friends and family** that contradicts their doctor

2x

More likely to follow **social media** advice that contradicts their doctor

Percentage who believe the average person can know as much as their doctor

Edelman Trust Barometer Special Report, 2023

Age 18-34 44%

Age 35-54 36%

Age 55+ 22%



“People are more engaged with health information and comparing findings across sources, and they want care that treats them like an equal partner.”

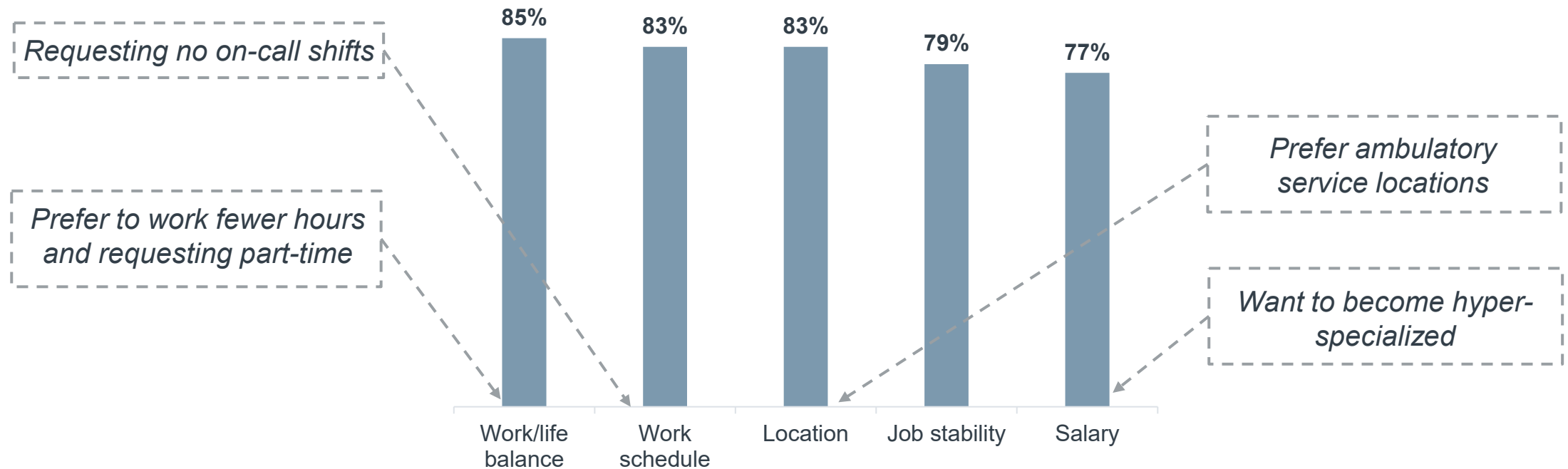
2023 Edelman Trust Barometer

Sources: 2023 Edelman Trust Barometer. Special Report: Trust and Health. Accessed May 23, 2024.

Gen Z and millennials will also change the workforce

Top priorities for new physicians choosing their first job

Medical Economics, 2022



Source: Payerchin R. [New physicians want work-life balance in first job, survey says](#). *Medical Economics*. March 11, 2022.

New generation of clinicians bring fresh skill sets

EMBRACE TEAM-BASED CARE



Relationship-oriented capabilities to understand what motivates patients



Leadership and influencing capabilities to be an effective team leader/team player



Better knowledge base on preventive medicine

LEVERAGE TECH-ENABLED CARE



Continuously learning data-related skills



The ability to accurately interpret genetic information generated by artificial intelligence (AI)



Understanding the business and economics of medicine

Source: Radin J, et al. [Rethinking the physician of the future: Embracing new technologies, empathy, and new models of care](#). Deloitte. Accessed January 17, 2025.

Top challenges for CV leaders through the next decade

- 1 Increase productivity without overburdening a dwindling supply of cardiologists.
- 2 Tailor growth plans to meet new patient and clinician demands.
- 3 Develop approaches to reduce the financial burden associated with high-demand, low-margin services.

02

Adapt for the next generation

How CV leaders can adapt for the future generation

..... To manage the **SUPPLY and DEMAND IMBALANCE** leaders need to... ..

1

Invest in the future of
clinical support technology

2

Elevate cardiologists
from “doer” to “director”

3

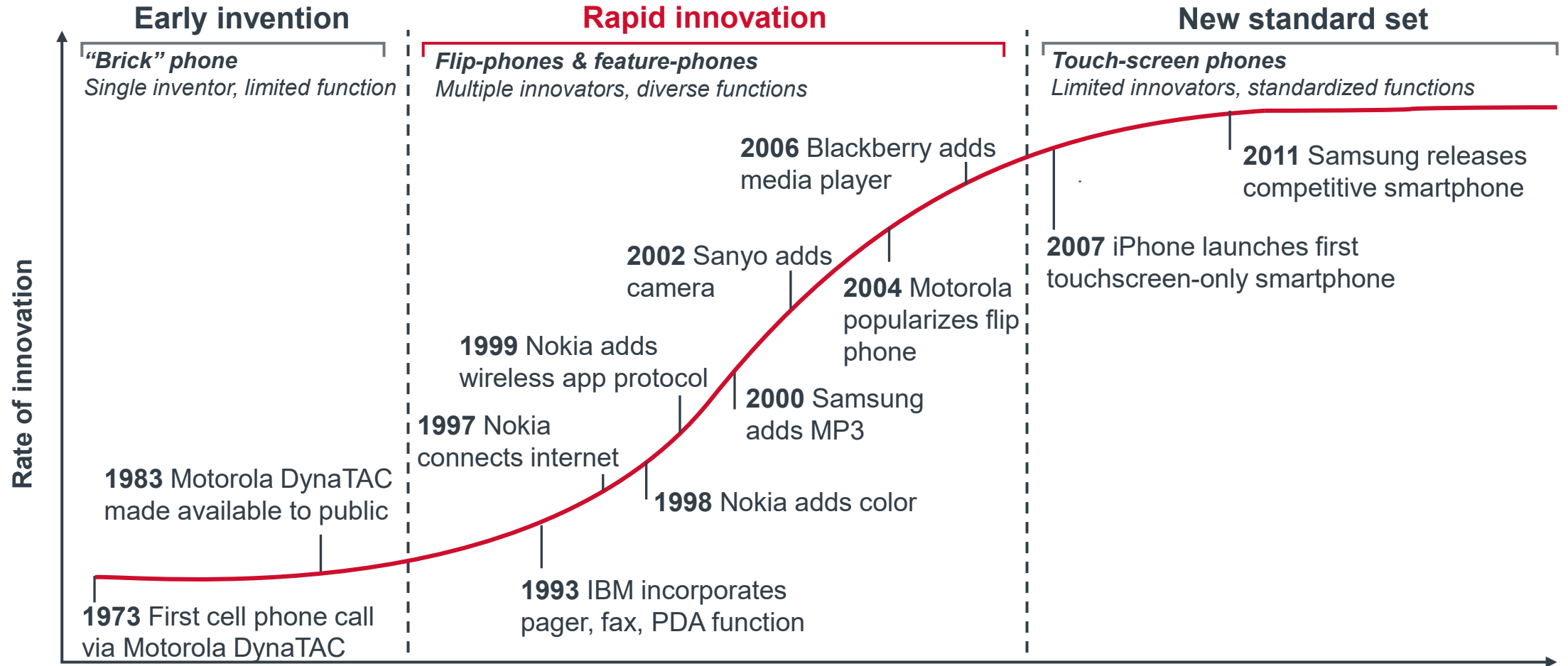
Align growth plans
with workforce realities



What is our role in critical CV prevention and medical management?

Invest in the future of clinical support technology


We are in the flip-phone era of clinician support tools



Source: Jackson, Elle. [History of the cell phone](#) – TommieMedia. May 2015. AIPRM. [50+ AI in Healthcare Statistics 2024](#) · AIPRM. Accessed Jan 3, 2025.

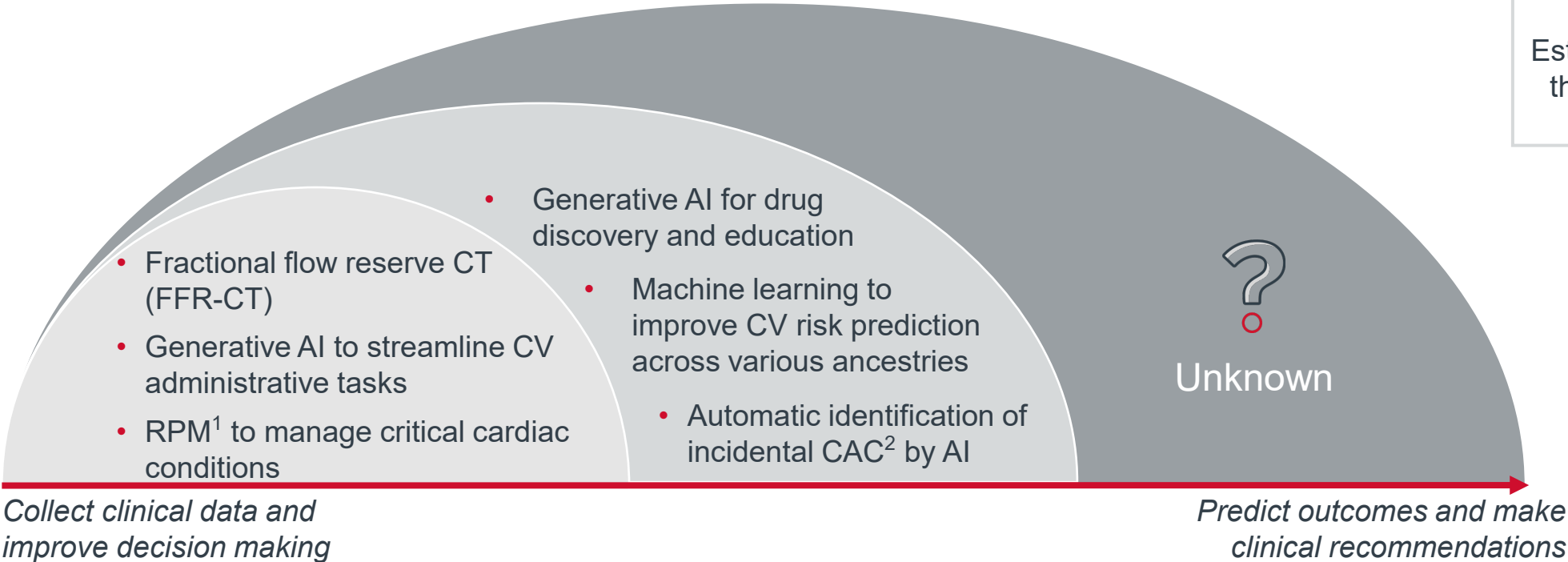
Clinical support technology will only improve

Evolution of technology in CV is powerful yet unpredictable

 DATA SPOTLIGHT

35.7%

Estimated CAGR³ for the AI market from 2024-2030



1. RPM: Remote patient monitoring

2. CAC: Coronary artery calcium

3. CAGR: Compounded annual growth rate

Source: New Cardiac Rehabilitation Survey Reveals 93% of Healthcare Providers Currently Utilize Remote Patient Monitoring Technology. DAIC. November 9, 2023; Fornell D. Cardiology now has more than 100 FDA cleared AI algorithms; experts say that is just the beginning. *Cardiovascular Business*, December 14, 2023. Mukherjee D. Artificial Intelligence Advances in Cardiology—Part 1: Key Points. ACC. June 12, 2024; Mukherjee, D. Artificial Intelligence Advances in Cardiology—Part 2: Key Points. ACC. June 12, 2024; Artificial Intelligence (AI) Market. Markets and Markets. May 2024.

Tech will be key to meeting future generation demands

	Population	Key challenge	Example of tech solutions
Patients	Baby boomers	Bring a higher volume for complex, inpatient care	Prisma Health used smart beds to improve quality for hospital patients and reduce burden on workforce.
	Gen X and millennials	Demand convenient access to services, data, technology, and pricing	Mayo Clinic mails remote cardiac monitoring devices to patients, enabling them to receive high-quality healthcare without the need to travel.
Clinicians	Millennials and Gen Z	Value work/life balance and are more tech-savvy	CardioOne invested in AI medical scribe technology to limit clinician time spent charting.

Source: William L. [Prisma Health invests \\$41 million in state-of-the-art smart beds across its health system](#). ABC25. July 3, 2024; CardioOne Partners [With DeepScribe to Bring Cardiology-specific Ambient AI to Practices](#). PR Newswire. October 15, 2024; Bahnsen C. [Mayo Clinic's Cardiac Monitoring Service sets stage for future of remote patient care around the globe](#). Mayo Clinic Laboratories. Accessed January 14, 2025.

Invest in people and processes to navigate innovation

3 key steps to prepare your organization to embrace a technological future

1

Cultivate tech-savvy leaders

- Appoint tech-savvy clinicians to leadership positions
- Create mentorship programs to enhance proficiency in technology

2

Raise the bar for tech selection

- Establish a health system committee to evaluate new technologies, ensuring they provide value, improve outcomes, and are cost effective
- Ensure CV service line team has a seat at the table for organization-level tech purchases
- Head to advisory.com to read “5 different ways to test healthcare technology”

3

Partner to develop the new standard

Engage in joint R&D projects with medtech companies to co-develop innovative cardiovascular technologies

Mount Sinai BioDesign leverages MedTech partnership to align innovation with health system goals.

Basic

Advanced

Elevate cardiologists from
“doer” to “director”

Cardiologist burnout signals need for system reform

Cardiologists of today struggle to get the job done

28%

Overall prevalence of mental health conditions among cardiologists

69%

Of interventional cardiologists were affected by burnout in 2022

26%

Increase in average wait time for a heart checkup from 2017 to 2022 (26.6 days)

228,524

Excess CVD deaths between 2020 and 2022 (9% beyond COVID-adjusted prediction)

And the future holds even greater challenge

▲ 46.8%

Projected growth in pacemaker implants across the next 10 years

▲ 85.2%

Projected growth in TAVR¹ procedures (w/o MCC²) across the next 10 years

▼ 60%

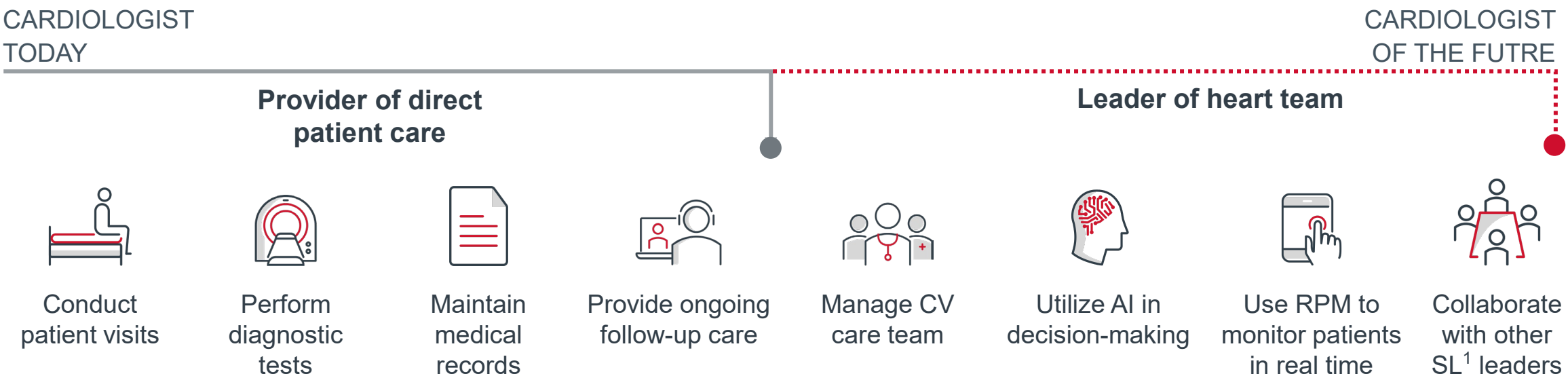
Shortage of physicians in nonmetro areas by 2037

1. TAVR: Transcatheter aortic valve replacement
2. MCC: Major complications or comorbidities

Source: Sauer AJ. [Mental Health Conditions Among Cardiologists: Silent Suffering](#). JACC. February 2023; Workforce in Crisis: Charting the Path Forward. ACC. June 2, 2023; [Opportunities Abound for Cardiologists](#). AMN Healthcare. July 3, 2023; [Appointment wait times increase across specialties, but not in family medicine](#). FPM. October 3, 2022; Woodruff RC, et al. [Trends in Cardiovascular Disease Mortality Rates and Excess Deaths, 2010–2022](#). AJPM. April 2024; [Health Workforce Projections](#). HRSA Health Workforce. Accessed January 17, 2025; Advisory Board Market Scenario Planner Tool.

Elevate cardiologists from “doer” to “director”

More cardiologists must spend time **overseeing care teams and technology**, rather than providing direct care.



1. SL: Service line

Source: The Multidisciplinary Heart Team in Cardiovascular Medicine: Current Role and Future Challenges. JACC. January 2, 2023.

How Boulder Community Health elevated cardiologists

Strategy

01 Adopted team-based approach

- Formed sub-specialty pods, which include 1-2 physicians, 1-2 APPs,¹ 3-4 medical assistants, and 1 registered nurse
- Pod physically gathers together and makes decisions as a team

02 Focused cardiologists on new patients

- New patient encounters scheduled with cardiologists
- Established patients shifted to APPs, who consult with physicians as needed
- Some flexibility based on physician preference

Results

28%

Increase in **new patient visits** between 2022 and 2023

15%

Increase in **echo testing**

- **Enabled physicians** to focus on care plans and bring in new patients
- **Met community's expectation** of visiting with an MD first
- **Satisfied cardiologists** by allowing option to continue relationship with select patients as they wished – these “easier” patients offered a “break in the day”

1. APPs: Advanced practice providers.

Source: [3 ways Boulder Community Health became a provider of choice for CV care](#), Advisory Board, 2024.



Align growth plans with workforce realities

CV leaders risk outgrowing their clinician supply

Most CV leaders rank growth as their top priority...

...and may fail to account for the workforce reality

Growth
Top priority



Workforce
Limiting factor

*“My job is to grow, grow, and **grow**.”*

CV service line director

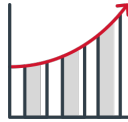
Result: Program fragility

Example: North Carolina academic medical center outgrows clinician supply with TAVR expansion

- Backlog of patient demand and favorable margin prompted expansion of structural heart program
- Plan failed to account for standard attrition and backfill limitation
- Loss of one cardiologist plus shortage of anesthesiologists limited ability to meet target volumes

Source: Advisory Board interviews.

Workforce realities require a new growth mindset



Conventional “growth mindset”

Grow to get bigger

Chase conventional profit pools

Preserve all strategic avenues

Assume sufficient workforce



Reality-aware “growth mindset”

Grow to get stronger

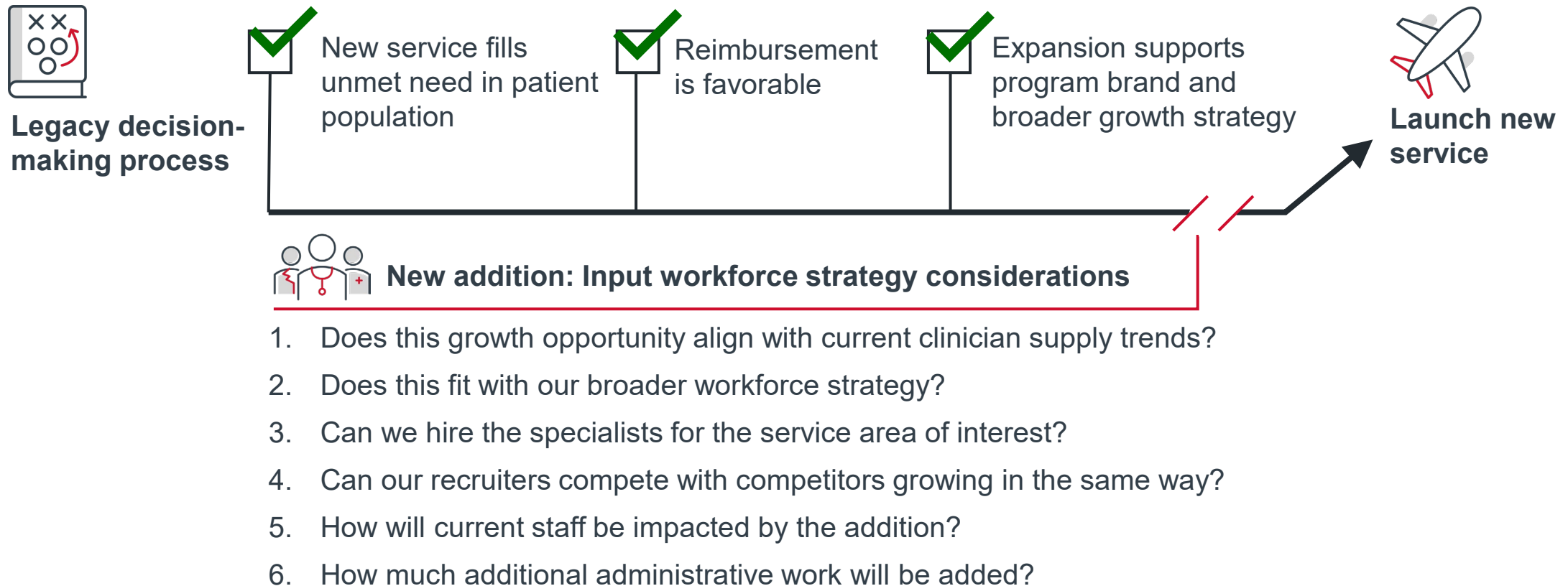
Cultivate comparative advantage

Practice principled pruning

Harmonize growth with workforce

Growth and workforce strategies must work in harmony

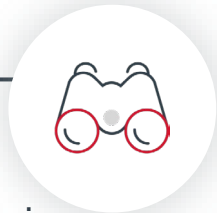
Process for evaluating growth opportunities



Urban hospital system puts differentiation before growth

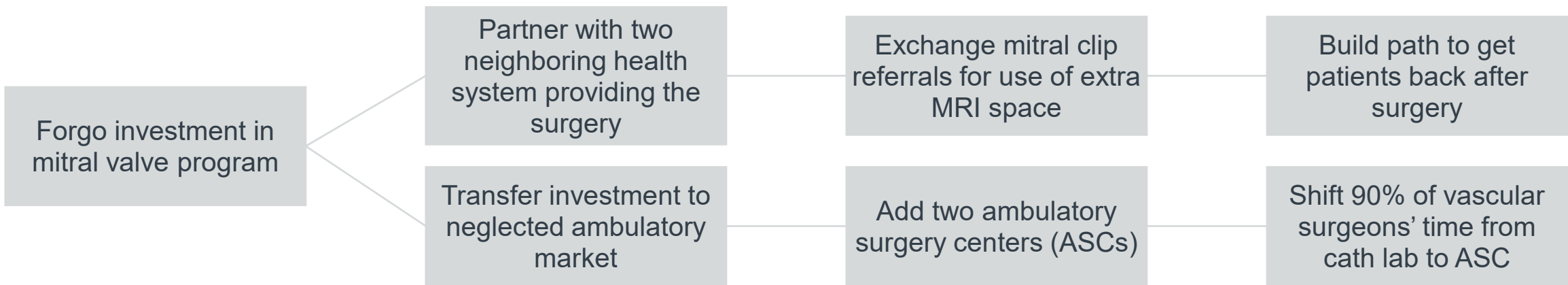
One cardiac program’s unique growth strategy will help them sustain a shrinking workforce

Their strategy



- 01 Avoid competing for specialists and patients
- 02 Invest in **market gaps** aligned with **clinician preferences**
- 03 Foster **partnerships** for referrals and resource sharing

Resulting growth plan



Source: Advisory Board interviews.

Commercial tactics: The next generation of CV customers

1

CV patients

- Bolster direct-to-patient digital, application-based communication
- Elevate wellness branding and marketing
- Develop complimentary digital tools for treatments and devices

2

CV clinicians

- Broaden engagement and training to include more clinician roles
- Offer digital-first option for cardiologist engagements
- Highlight clinician-facing companion tools that improve decision-making and enable RPM
- Understand the impact of technology that supports decision-making on product purchasing decisions

3

Life science-provider partnership

- Emphasize efficiency metrics like throughput and contribution margin in value story
- Provide guidance through product launch to maximize profit margin for provider
- Expect changes in purchasing decisions – including the length of the process and roles involved
- If you have a premium-priced product, emphasize your partnership and consulting value

03

CV prevention: What's our role?

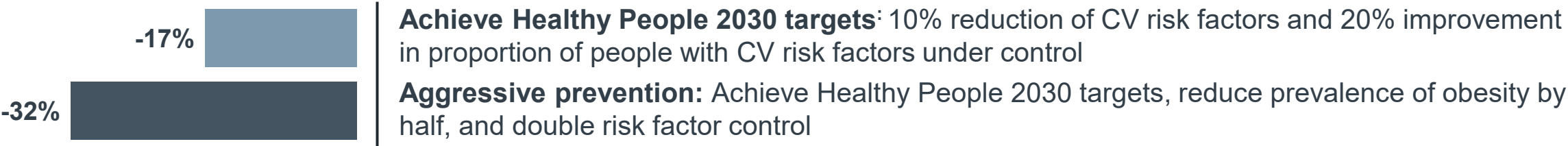
“I can open an interventional cardiologist position, and I will have 20 applicants, but I can't find general cardiologists.”

- Senior physician recruiter

Source: Fornell, D. [The growing shortage of general cardiologists and recruiting crisis in rural America](#). Cardiovascular Business. April 12, 2024.

Leaders play hot potato with important CV prevention

Percentage reduction in CVD and stroke events by 2050 if prevention efforts begin today



“That’s not really the job of a cardiologist – it’s more primary care. Of course, they don’t have the staff either.”

CV service line director



“Employers and insurers have the motive to prevent CVD, just not the experience.”

VP of heart institute

Source: Joynt Maddox KE, et al. Forecasting the Burden of Cardiovascular Disease and Stroke in the United States Through 2050—Prevalence of Risk Factors and Disease: A Presidential Advisory From the American Heart Association. Circulation. June 4, 2024.

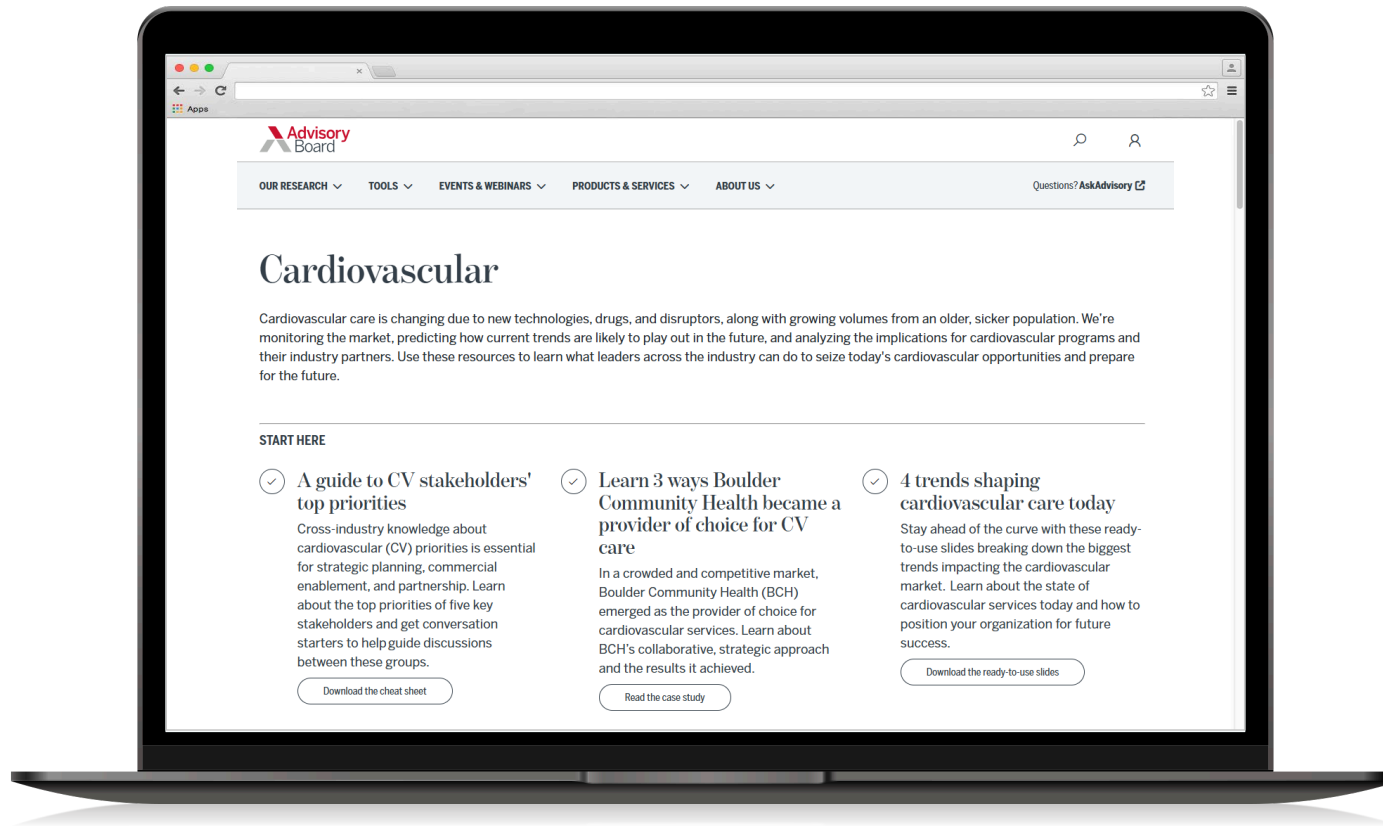


How can we partner for
prevention?

Key takeaways

- 01 **Invest for strength** rather than for the perception of being "innovative."
- 02 **Leverage the strengths of the next generation of cardiologists**, rather than forcing them into the existing system.
- 03 **Align workforce and retention** strategies with growth plans.
- 04 **Partner to serve patients**, rather than doing it all alone.

Access our full suite of CV research here



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1. Top market insights
2. Stakeholder priorities cheat sheet
3. Case studies and tactical guidance
4. Life science and Medtech partnership guides

[Cardiovascular resource library](#)