

Market Research: Healthcare's Continued Evolution Amid Uncertainty



Leading a healthcare organization in the current market requires more strategy, agility, and grit than ever before. Healthcare leaders are **solving complex and important problems**, and the **stakes have never been higher**.

Huron surveyed more than 300 healthcare leaders across the U.S. to get their take on the state of the industry. Leaders from five functional areas — strategy and innovation, finance and operations, clinical care, technology, and people — responded to share the biggest factors influencing the success of their organizations.

Research from Huron reveals leaders' priorities and provides a glimpse into the latest opportunities and threats confronting healthcare organizations.

Top 10 Trends in Healthcare: Care Is No. 1

Leaders were asked to select the top five trends they expect to impact their organizations in the next 12 months. Of the top health trends, nearly all relate to how and where organizations deliver care.



01

Virtual care delivery
(acute care in the home, telehealth, and remote patient monitoring)



02

Care delivery
(physical care facilities and health communities)



03

Care access transformation



04

Serving Medicare and Medicaid populations



05

Ambulatory care expansion



06

Health equity in my community



07

Revenue growth



08

New economic models, including strategic partnerships



09

Managing health system capacity



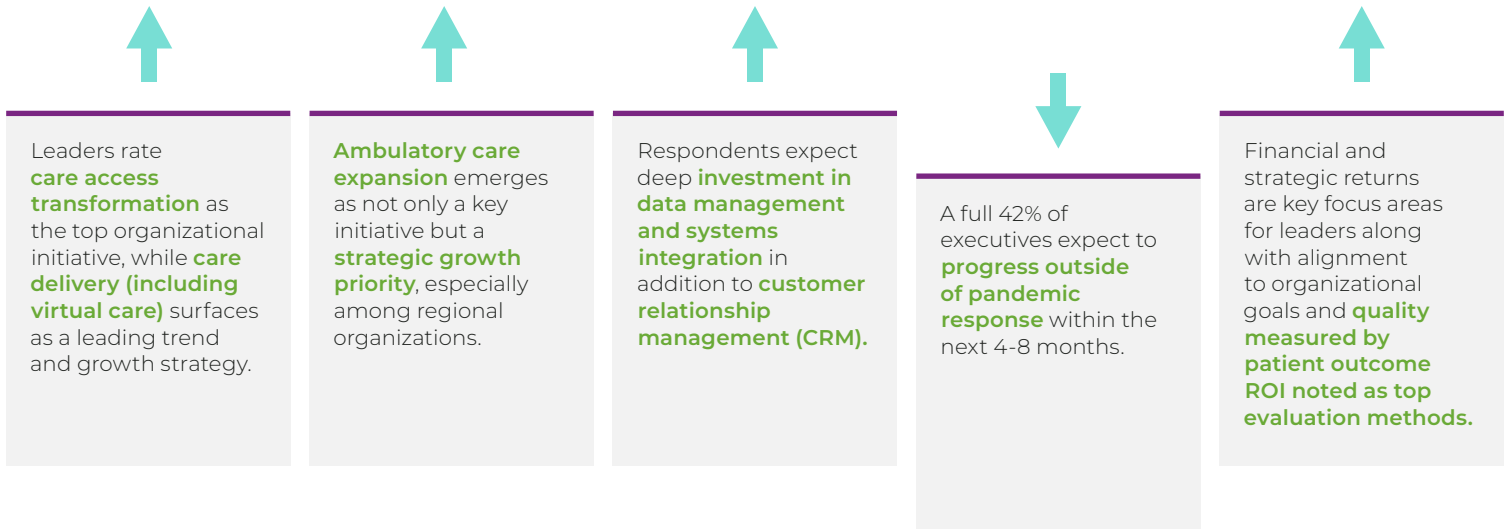
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Technology infrastructure Redefining portfolio

*Statistically tied

Quick Look: Leaders' Priorities Change

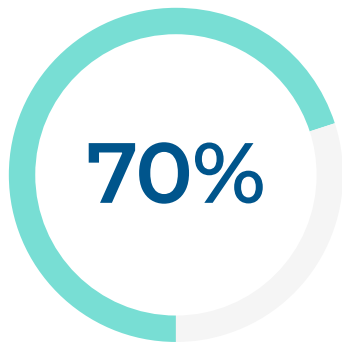
Longitudinal research from Huron provides a view of how the priorities of leaders have shifted in response to market conditions.



“Even though we’ve had ups and downs in telehealth, it’s still a major force, a major factor. Now it’s moving more towards the **hospital-at-home or remote patient monitoring devices (RPM)**. We are taking advantage of improvements in the technology surrounding artificial intelligence and machine learning, so that has helped us a lot.”

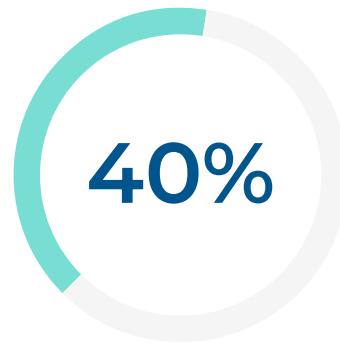
— CHIEF INFORMATION OFFICER (CIO), REGIONAL HEALTH SYSTEM

Social Determinants of Health (SDOH)



Nearly 70% of **leaders consider SDOH a high priority** and will invest in the next 3 years

Care Access



40% of organizations are investing in initiatives to **improve care access**

Looking Ahead: Strategic Growth Initiatives Are Imperative

Highly strategic growth is more important than ever as organizations grapple with the long-lasting financial pressures of COVID-19 coupled with looming U.S. economic uncertainty.

Leading organizations will embrace the following strategies in the coming months:



Strategic cost reductions that cut across all areas of the health system (e.g., supply chain, clinical documentation improvement, workforce, portfolio management, interoperability optimization)



Partnership advisory (e.g., strategic partnership, managed services, outsourcing, advisory services)



Staff recruitment and retention with a holistic focus on culture and leadership



Technology-enabled care, including a deeper understanding of consumer preferences



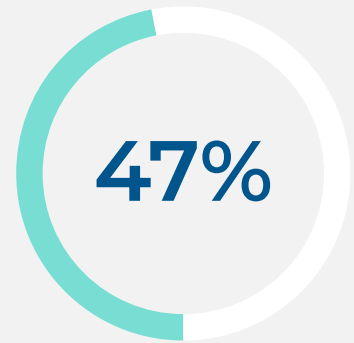
Data management and analytical decision making

As the trends indicate, [care transformation strategies](#) are front and center. Providers will need a holistic approach to prepare their organizations and overcome ongoing financial uncertainty. There are opportunities to mitigate risk and spur transformation for those ready to act.

“Healthcare systems and **the system overall were very distracted by COVID and its impact**, and now by workforce issues. And I think all of that causes distraction and puts some of the **care transformation efforts at risk.**”

— PRESIDENT OF POPULATION HEALTH, REGIONAL HEALTH SYSTEM

Cost Reduction



47% of leaders predict **supply cost reductions** will be the No. 1 cost-saving initiative in 2023

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