

Healthcare Leadership

December 2022



Research Overview



Research Overview

HIMSS Market Intelligence conducted this research in October & November 2022. The research was conducted among Executives, IT / Technology leaders, and Clinicians to understand their outlook on organizational transformation and their readiness for the future. Topics included:

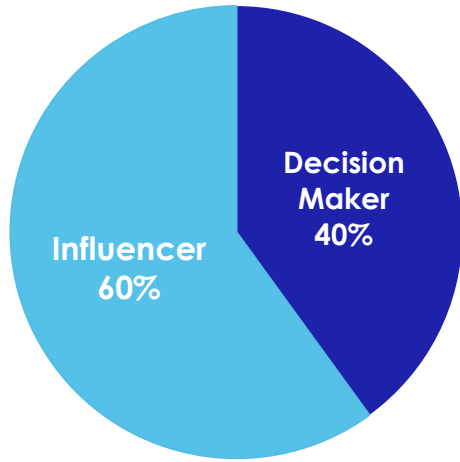
- Organizational readiness for transformation in the next 1-2 years
- Impact of recent changes in healthcare landscape on organizations
- Financial preparedness for the future
- Priorities of leadership and potential challenges over the next 1-2 years

Methodology

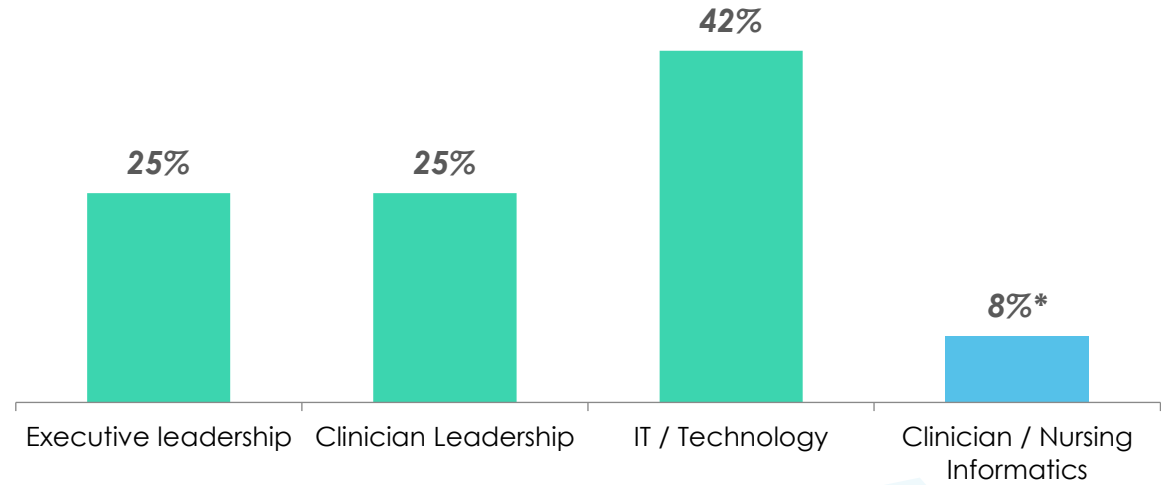
- This research was conducted online amongst Executives, IT / Technology leaders, and Clinicians in healthcare in the United States.
- Respondents were screened for having a role in decision making regarding organizational transformation investments at their organization.
- A total of 100 qualified respondents participated in this research.
- This was a blind data collection effort; Philips was not identified as a sponsor of the research.

Respondent Profile

Role in Organizational Transformation Investments

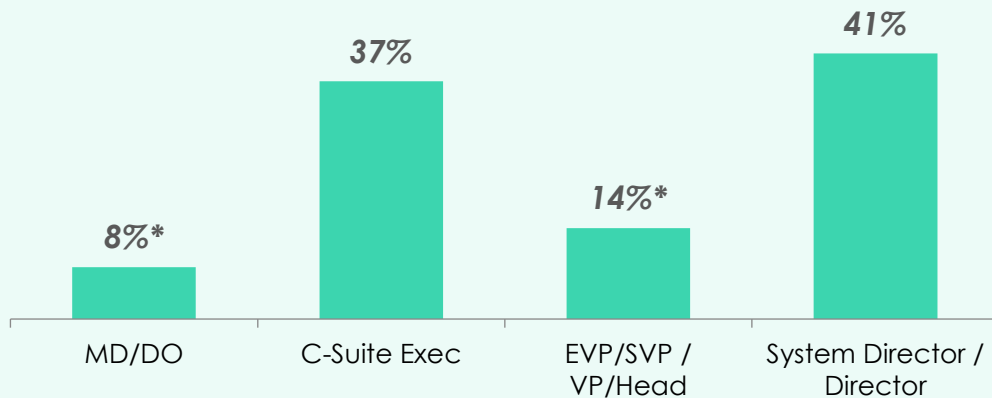


Job Function



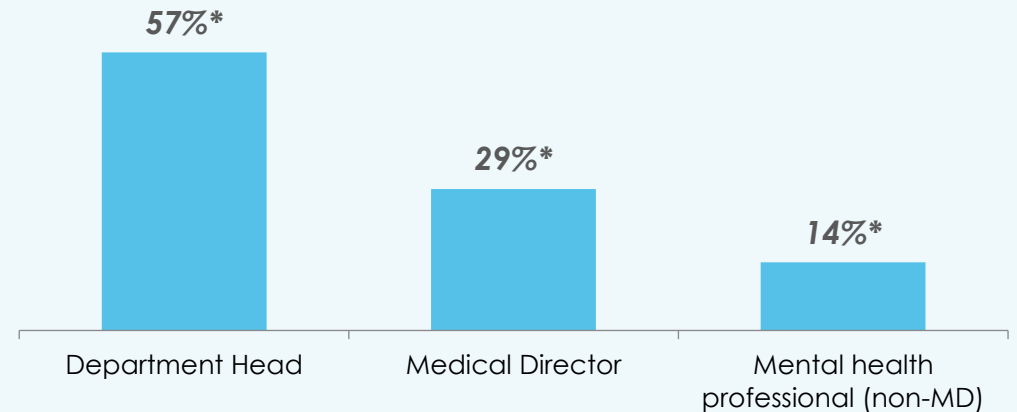
Job Role

among non-Clinicians



Clinician Position*

among Clinicians



S5. Which of the following best describes your role regarding organizational transformation (e.g., technology, operations, etc.), either for patient care of the back office, for your hospital or health system? (Base: Total Respondents; n = 100)

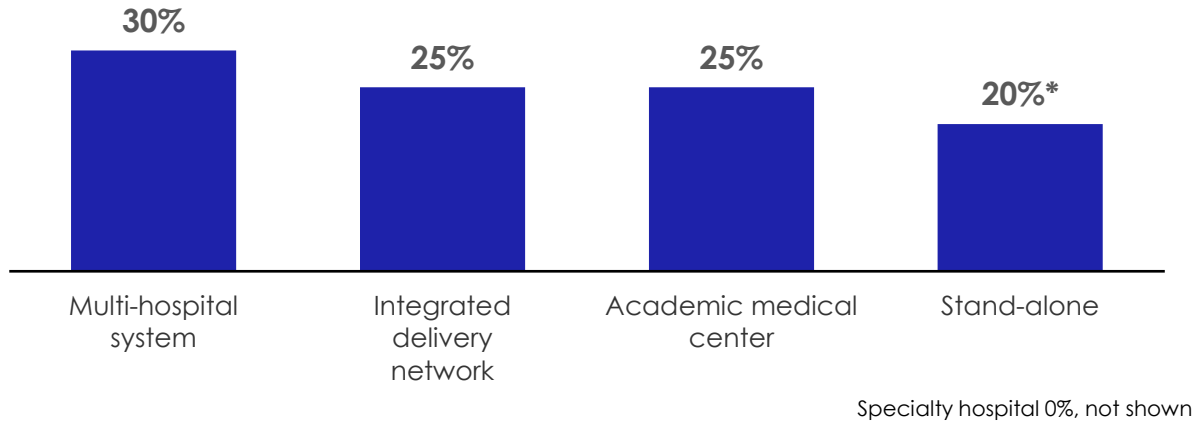
S2. How would you characterize your job role or function? (Base: Total Respondents; n = 100)

S3. What is your current role? (Base: Total non-Clinicians; n = 93)

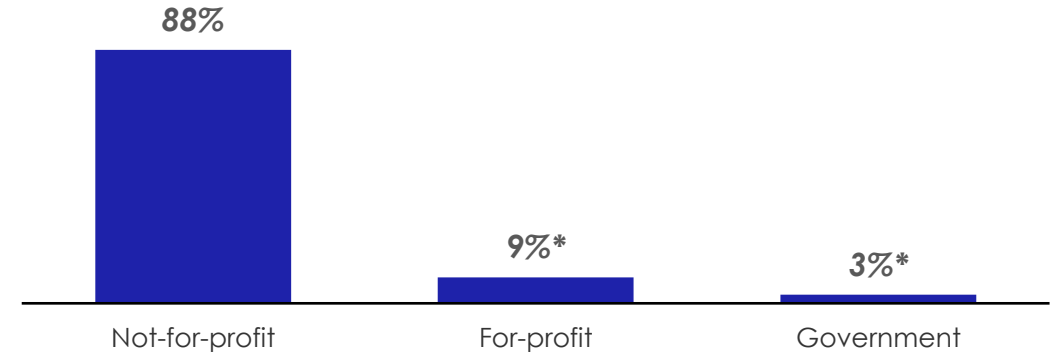
S4. What is your current position? (Base: Total Clinicians; n = 7*)

Organizational Profile

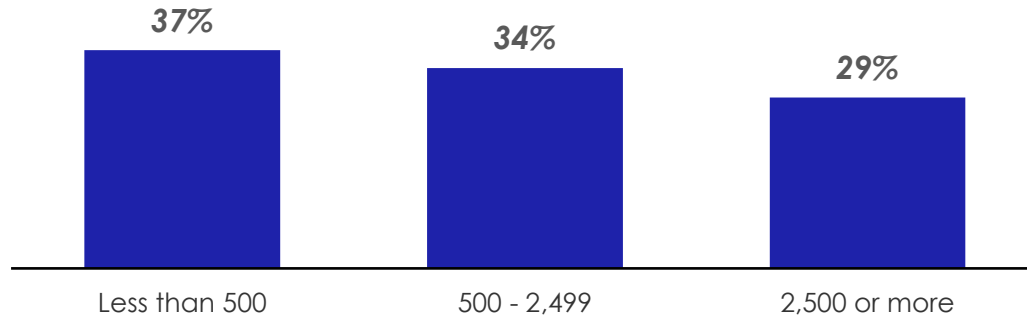
Worksite



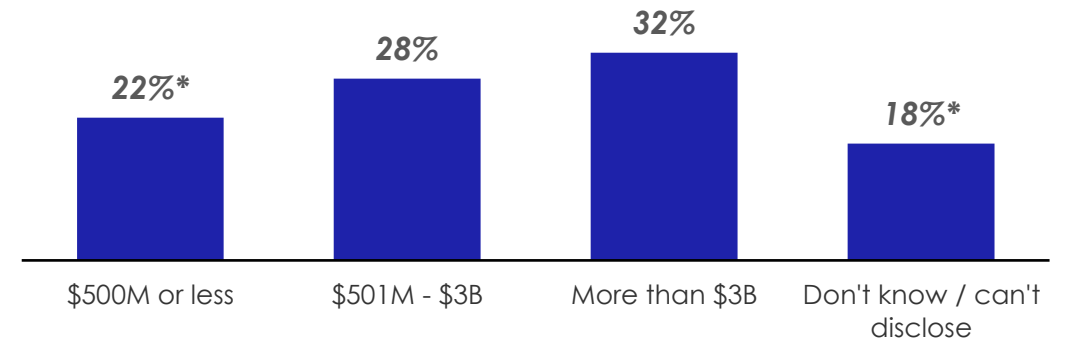
Ownership



Number of Hospital Beds

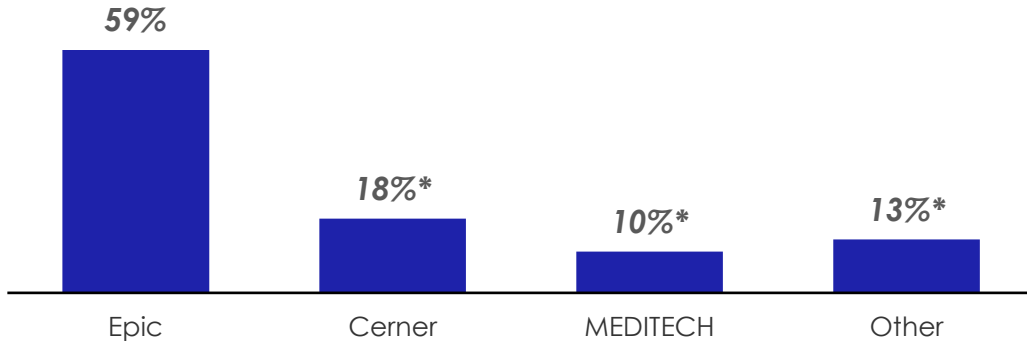


Annual Revenue



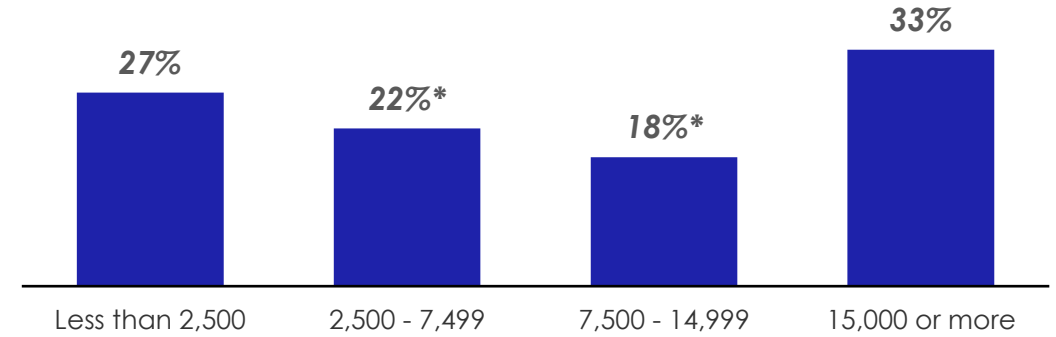
Organizational Profile

EHR Platform

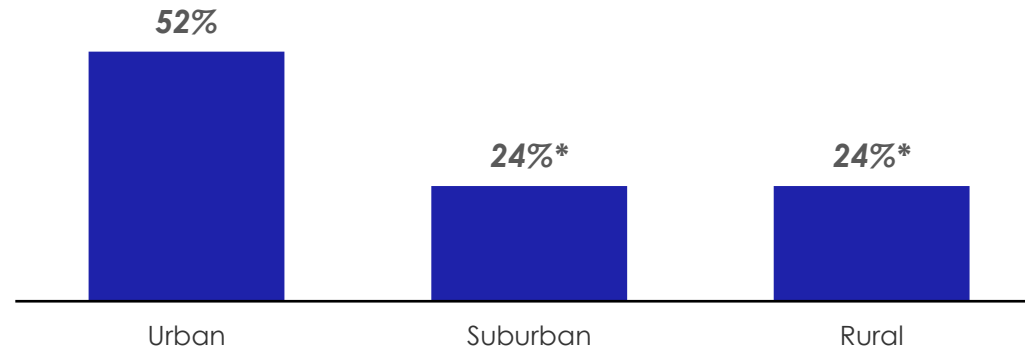


EHR platforms at or under 5%, not shown & grouped into 'other'

Number of Employees



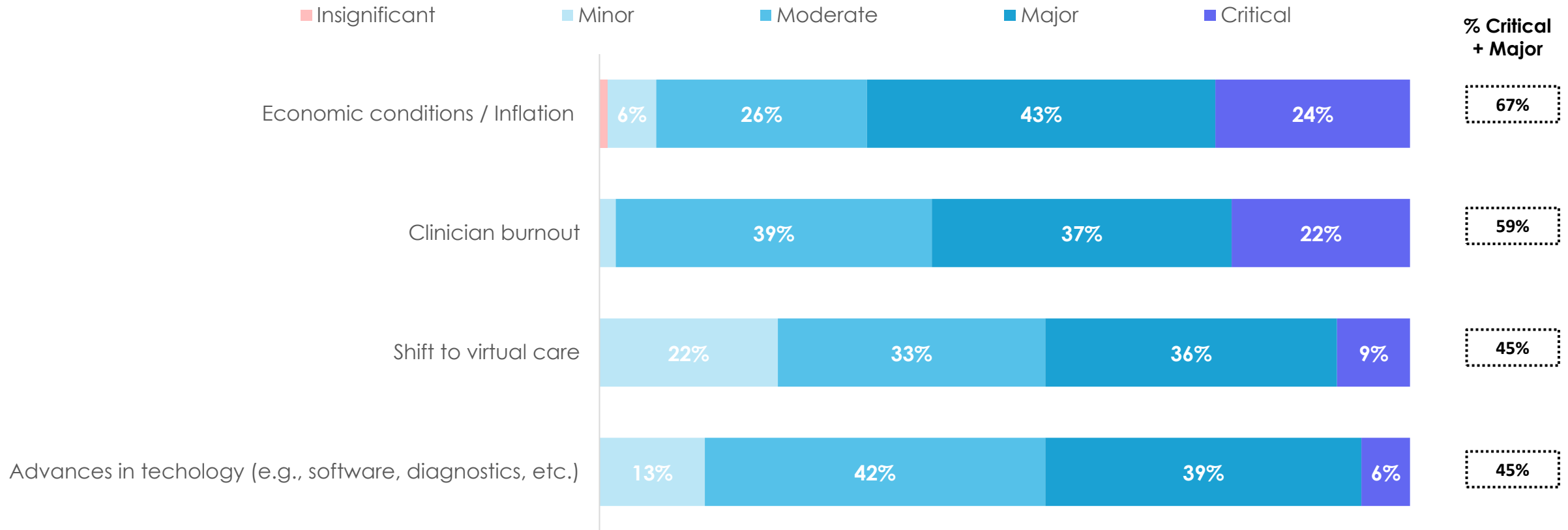
Location



Detailed Findings

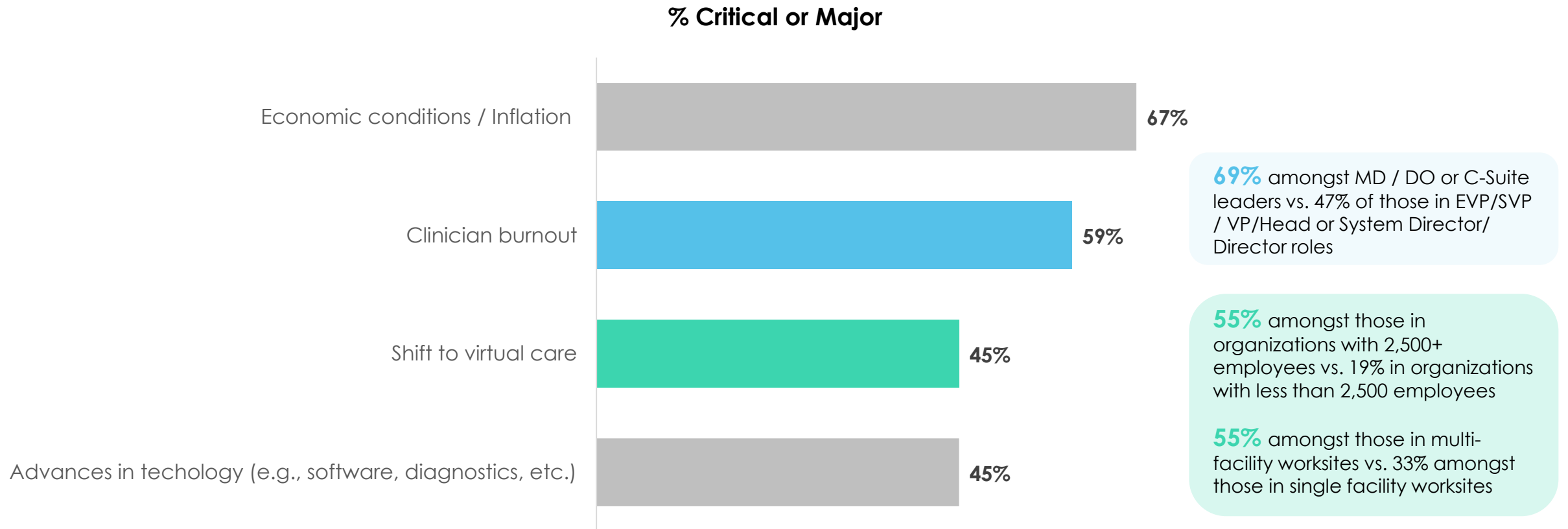
When asked to reflect on the past 1-2 years, executives, IT / technology leaders, and clinicians say that the economy and clinician burnout have had the greatest impact on their organizations

How would you rate the impact that each of the following has had on your organization over the past 1-2 years?



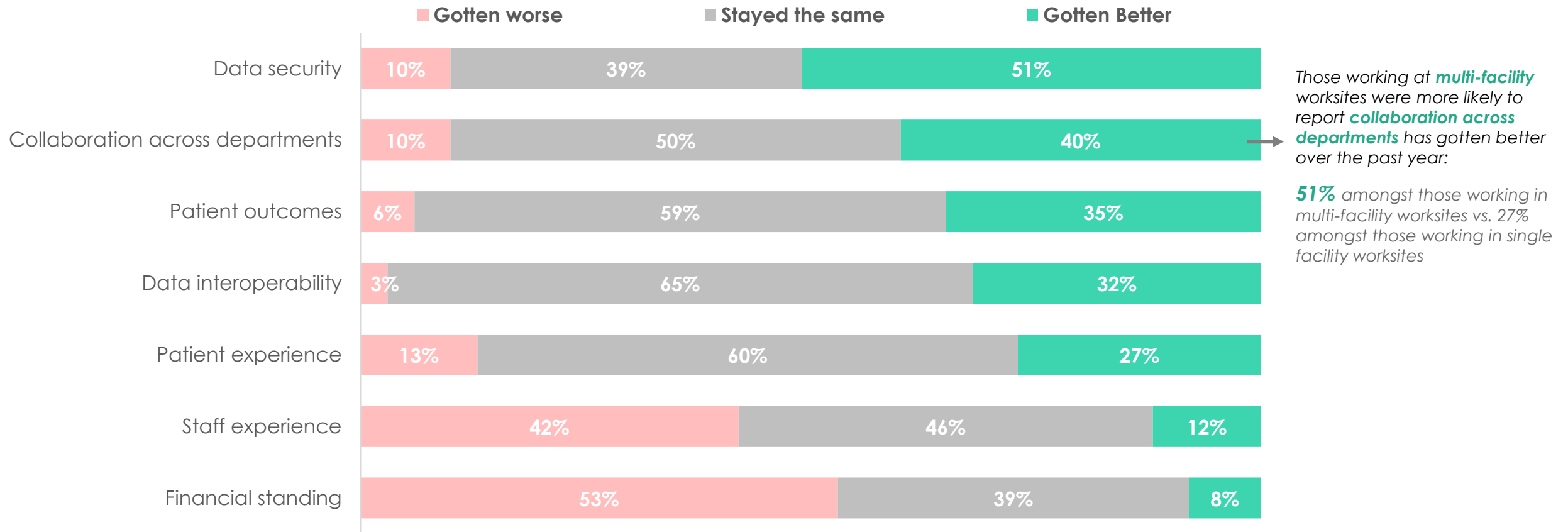
The shift to virtual care has had a disproportionate impact on organizations with 2,500+ employees over the past 1-2 years

How would you rate the impact that each of the following has had on your organization over the past 1-2 years?



Half of respondents shared that data security at their organization has gotten better over the past year; half of those at multi-facility worksites also reported that collaboration across departments has improved

In thinking about your organization (not the industry as a whole), have each of the following gotten worse, stayed the same, or gotten better over the past year?



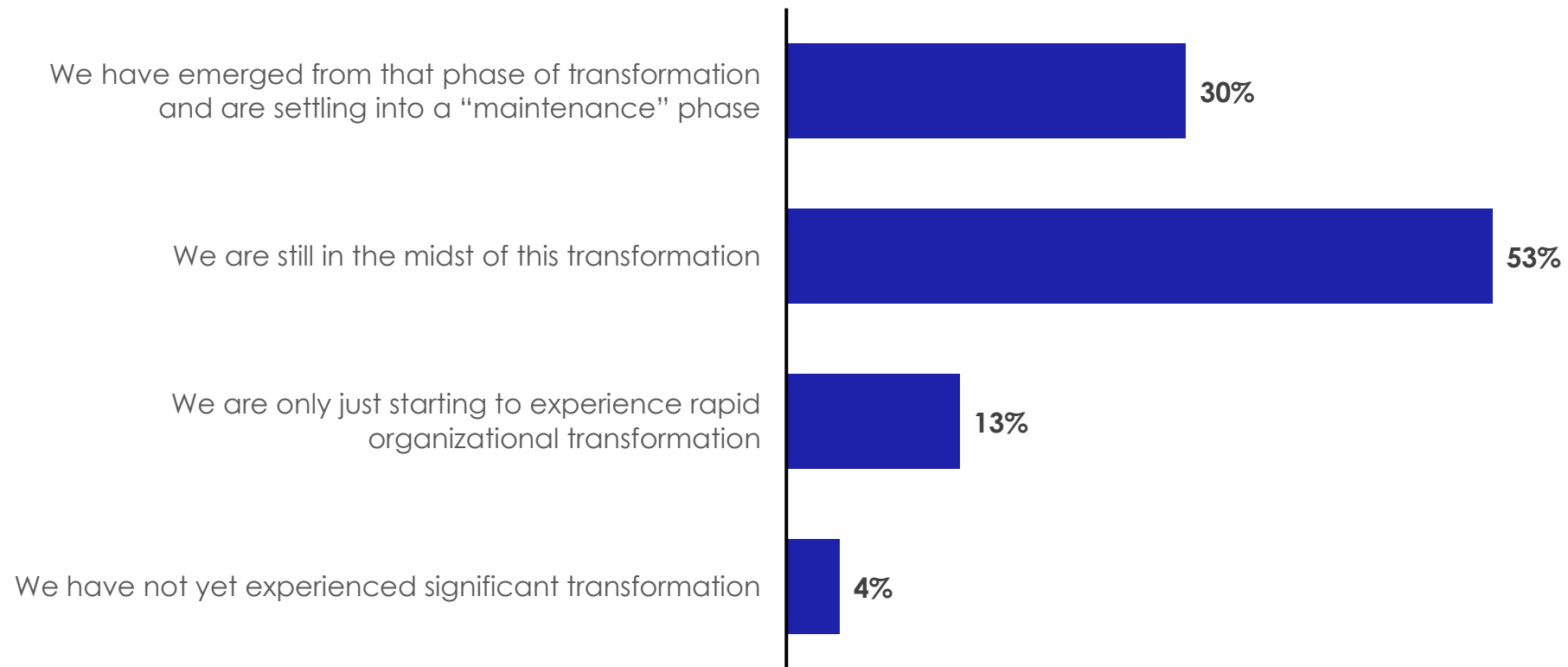
Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

Q4. In thinking about your organization (not the industry as a whole), have each of the following gotten worse, stayed the same, or gotten better over the past year?
Base: Total Respondents; n = 100

Over half of executives, IT / technology leaders, and clinicians say their organization is still in the midst of a transformation triggered by the pandemic, while less than one-third report being complete with their organizational transformation

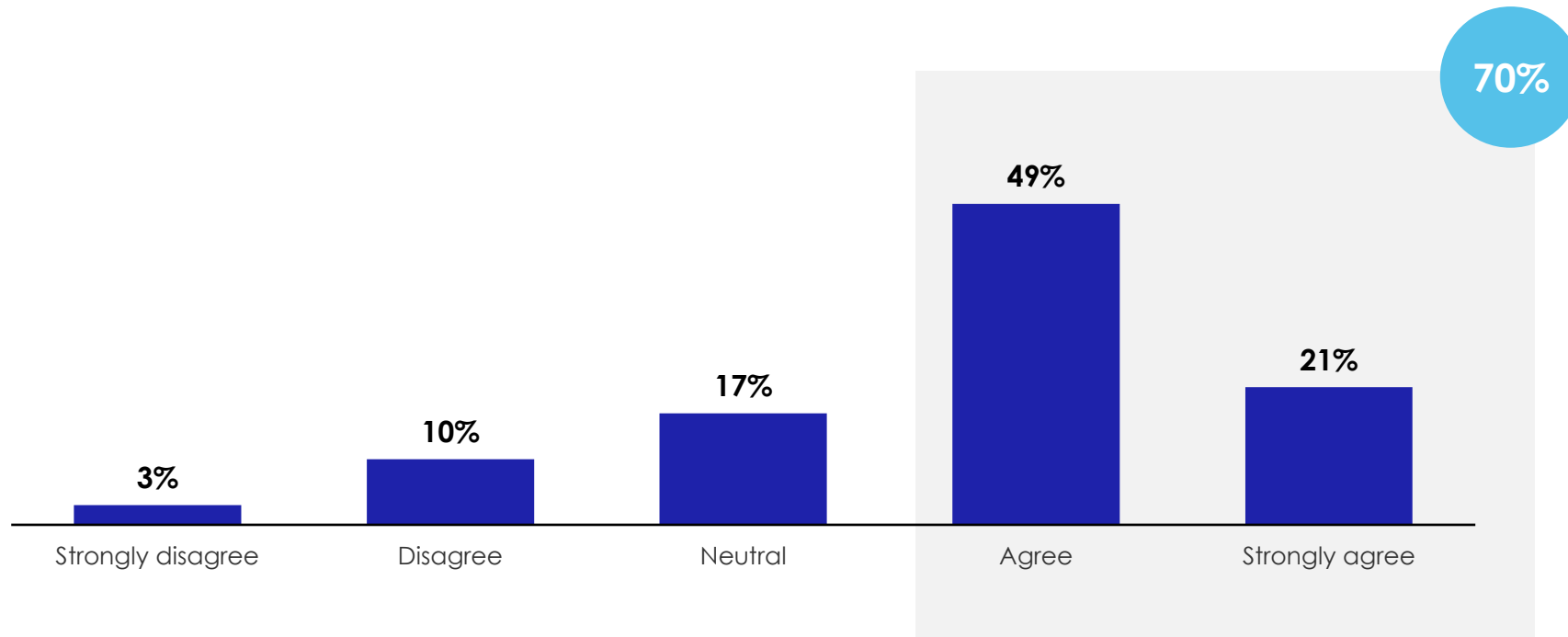
Which of the following best describes your organization now, with the pandemic behind us?



Most healthcare executives, IT / technology leaders, and clinicians believe their leadership teams are well-equipped to navigate the rapidly-changing healthcare industry over the next couple years

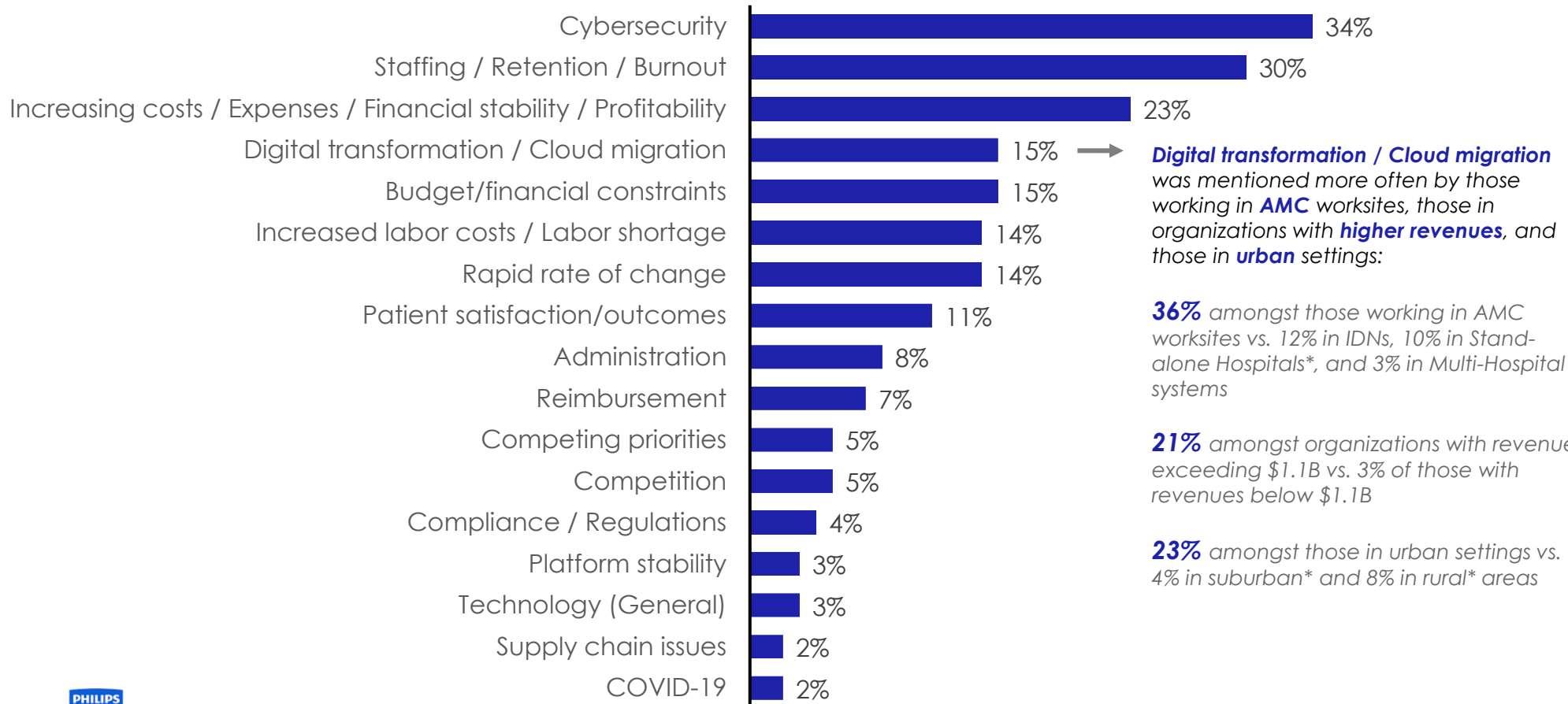
Please rate your level agreement with the following statement:

Our leadership team is well-equipped to navigate the healthcare industry's rapidly changing landscape and successfully evolve our organization over the next 1-2 years.



But they are concerned about cybersecurity, staff retention & burnout, and increasing costs / profitability when thinking about the future

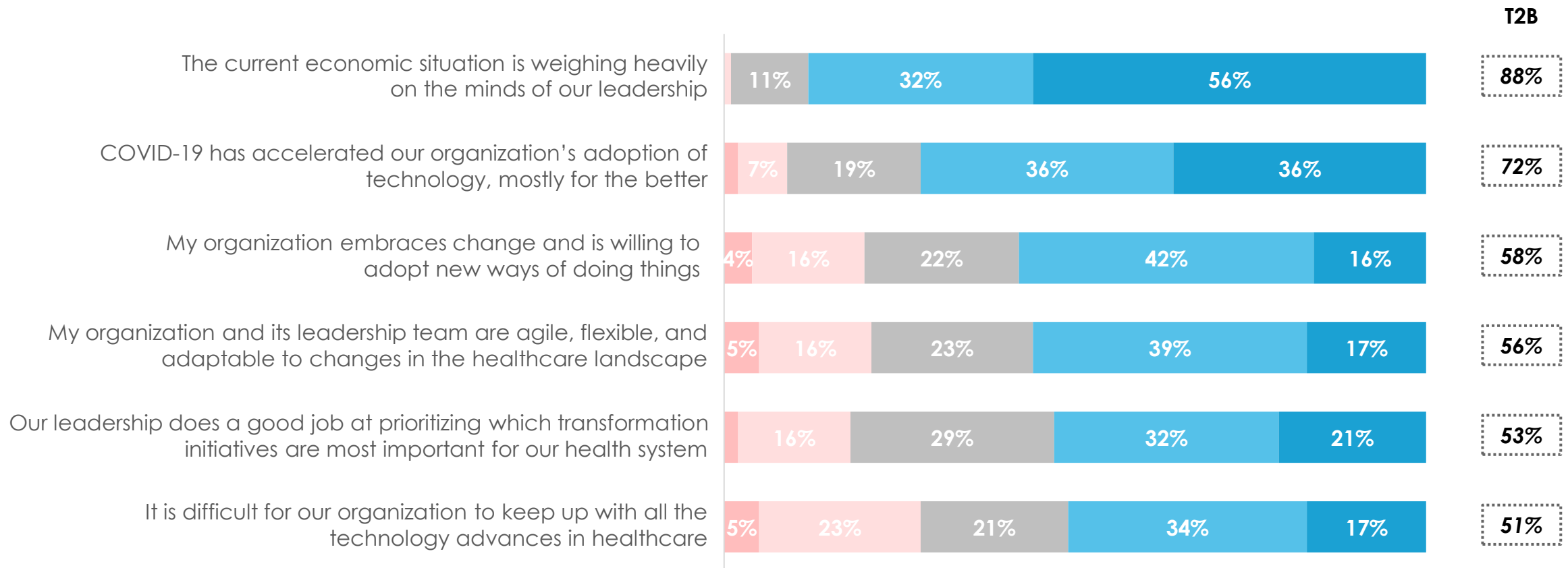
What is keeping you up at night when thinking about the future of your organization? What is most on your mind these days?



Healthcare executives, IT / technology leaders, and clinicians agree that the current economic situation is weighing heavily on their minds; nearly three-quarters also agree that the pandemic accelerated their organization's adoption of technology

Please rate your level of agreement with each of the following statements.

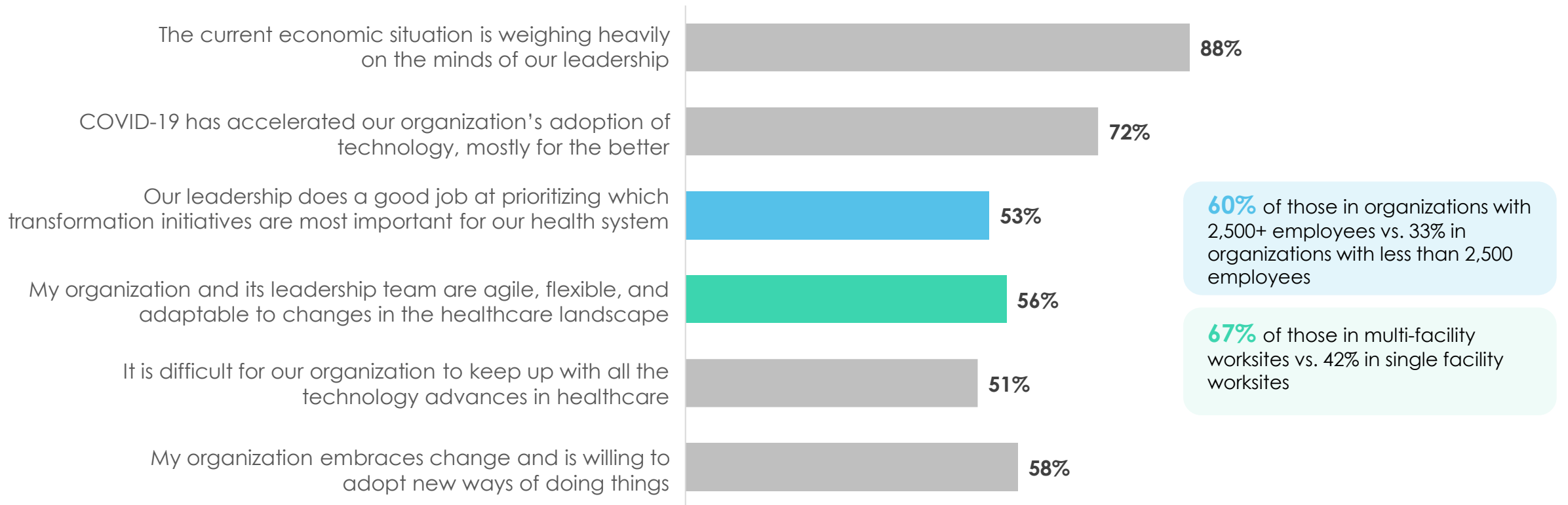
Strongly disagree Somewhat disagree Neutral Somewhat agree Strongly agree



Those in larger organizations are more likely to agree that their leadership team is adaptable and does a good job at prioritizing transformation initiatives

Please rate your level of agreement with each of the following statements.

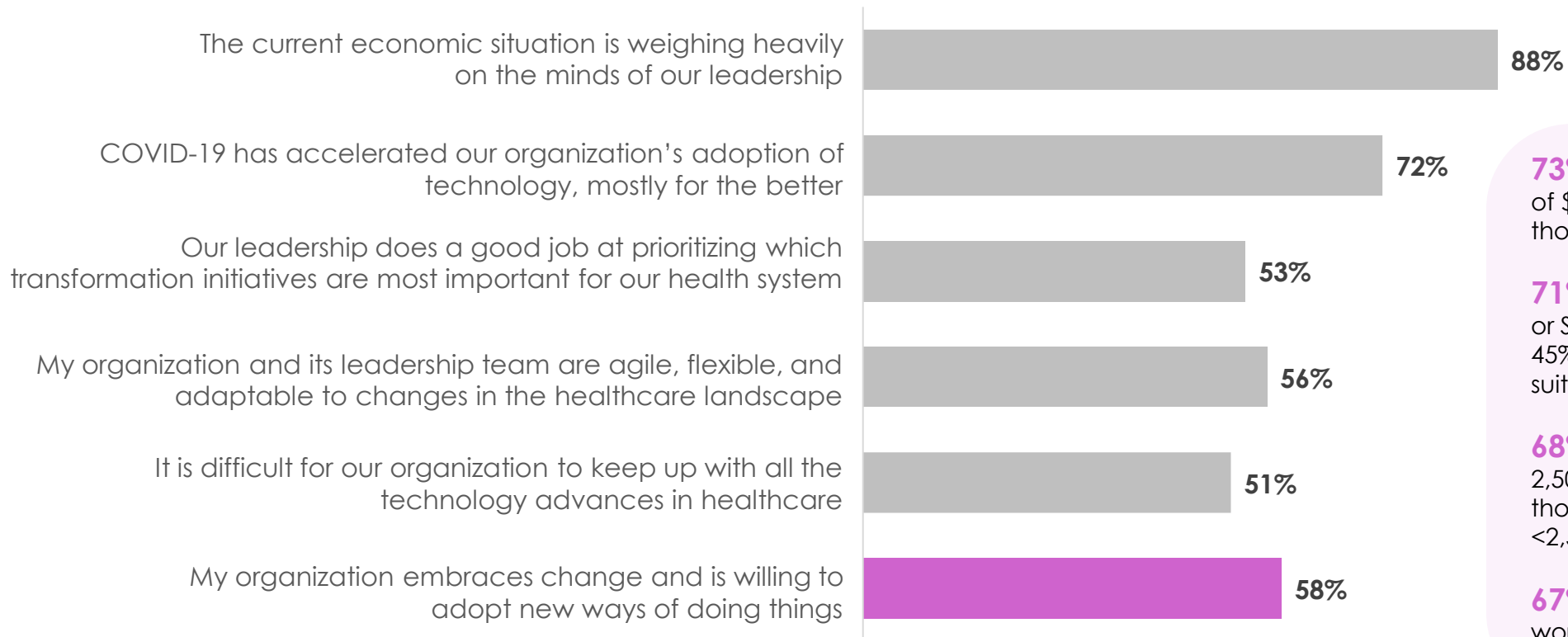
T2B: % Strongly Agree + Somewhat Agree



Those in larger organizations and Director through EVP/SVP roles are also more likely to agree that their organization embraces change and is willing to adapt to new ways of doing things

Please rate your level of agreement with each of the following statements.

T2B: % Strongly Agree + Somewhat Agree



73% of organizations with revenues of \$1.1B or more vs. 47% amongst those with less than \$1.1B in revenue

71% of those in EVP/SVP, VP/Head, or System Director/Director roles vs. 45% amongst those in MD/DO or C-suite roles

68% of those in organizations with 2,500+ employees vs. 30% amongst those whose organizations have <2,500 employees

67% of those in multi-facility worksites vs. 47% in single facility worksites



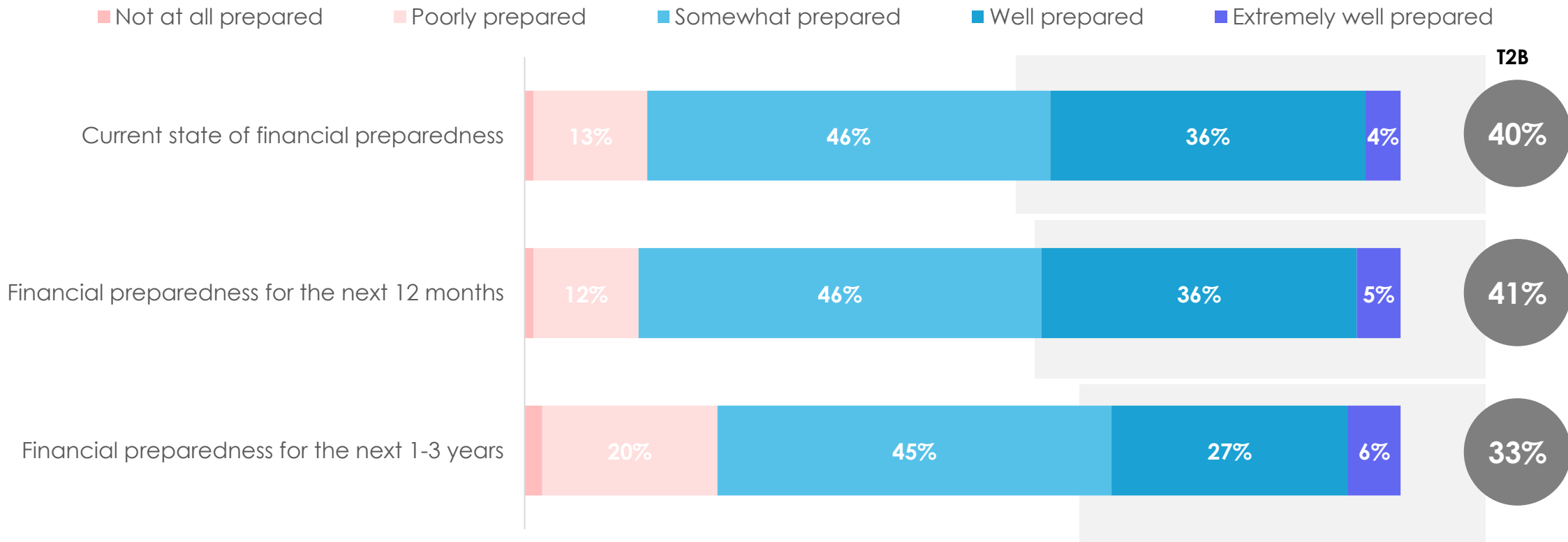
Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

Q16. Please rate your level of agreement with each of the following statements.
Base: Total Respondents; n=100

Just 2-in-5 say their organization is currently in a state of financial preparedness; looking ahead to the next 1-3 years, executives, IT / technology leaders, and clinicians are less likely to believe their organization is financially prepared

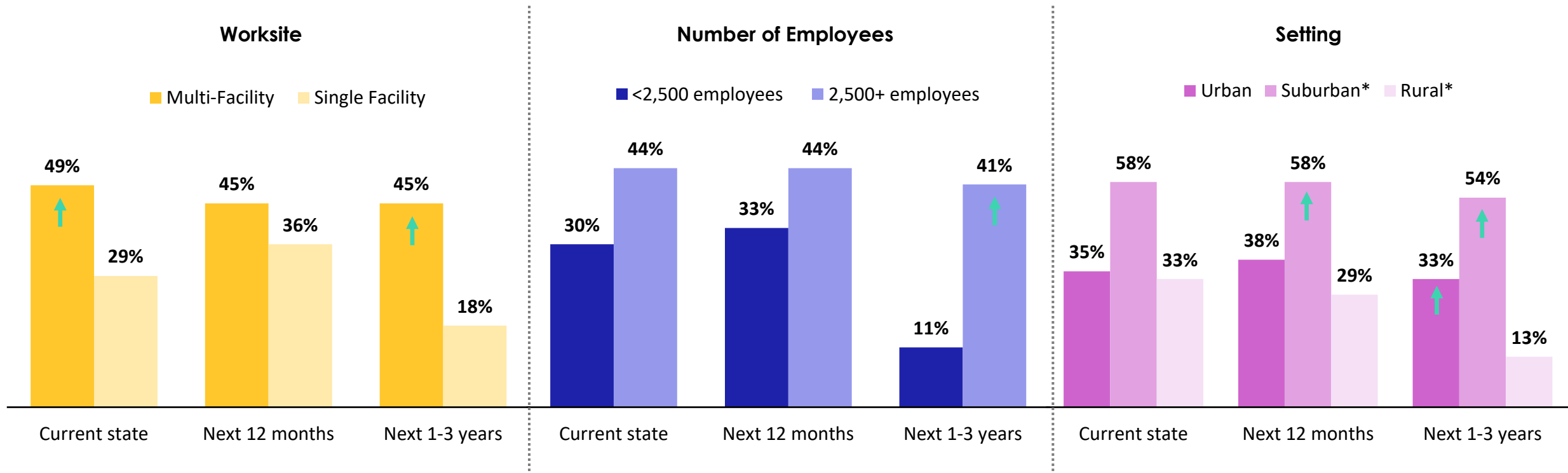
How would you rate your organization's financial preparedness?



Those in multi-facility worksites, suburban settings, and organizations with more employees indicate a better state of financial preparedness for their organizations

How would you rate your organization's financial preparedness?

T2B: % Well prepared + Extremely prepared



*Small base sizes, insight is directional

Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

↑ Significantly higher than other segment(s) at 95% confidence




Q6. How would you rate your organization's current state of financial preparedness? What about its financial outlook for the future?
Base: Total Respondents; n = 100

Labor availability is having the most significant impact on financial preparedness for healthcare organizations

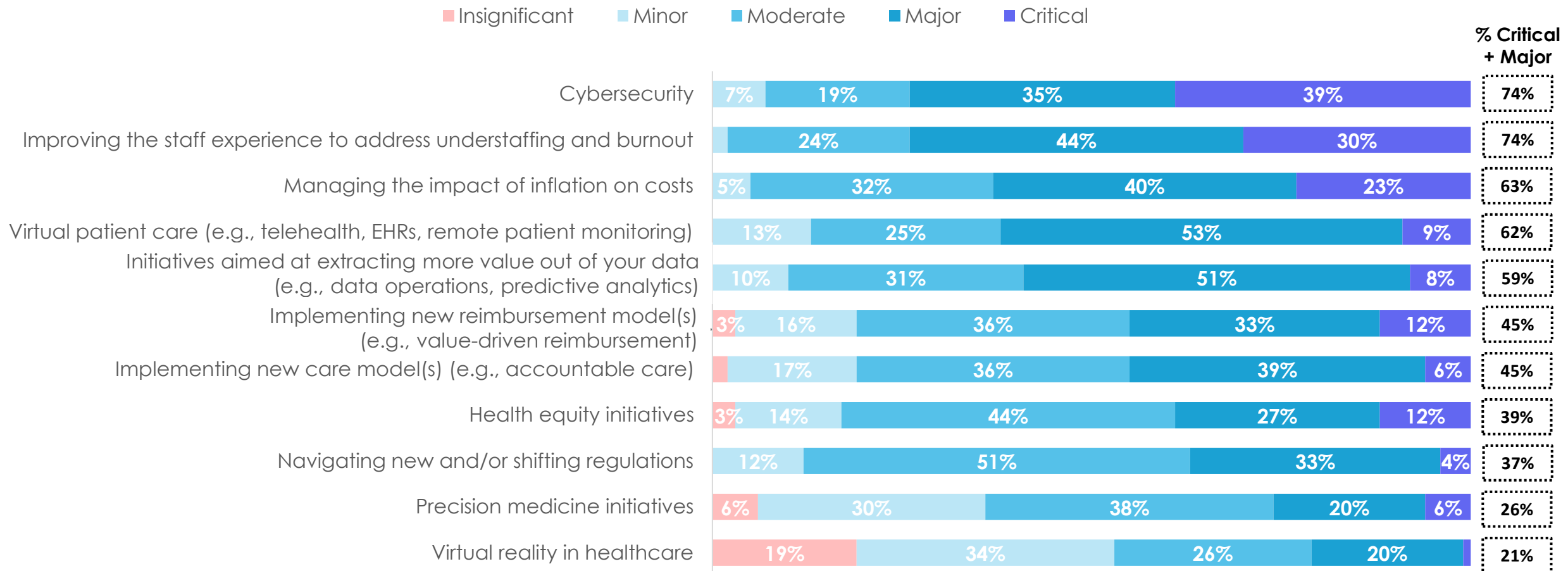
What is having the most significant impact on your organization's financial preparedness currently and/or over the next 1-3 years?




Average of **three** items selected as having the most significant impact across respondents

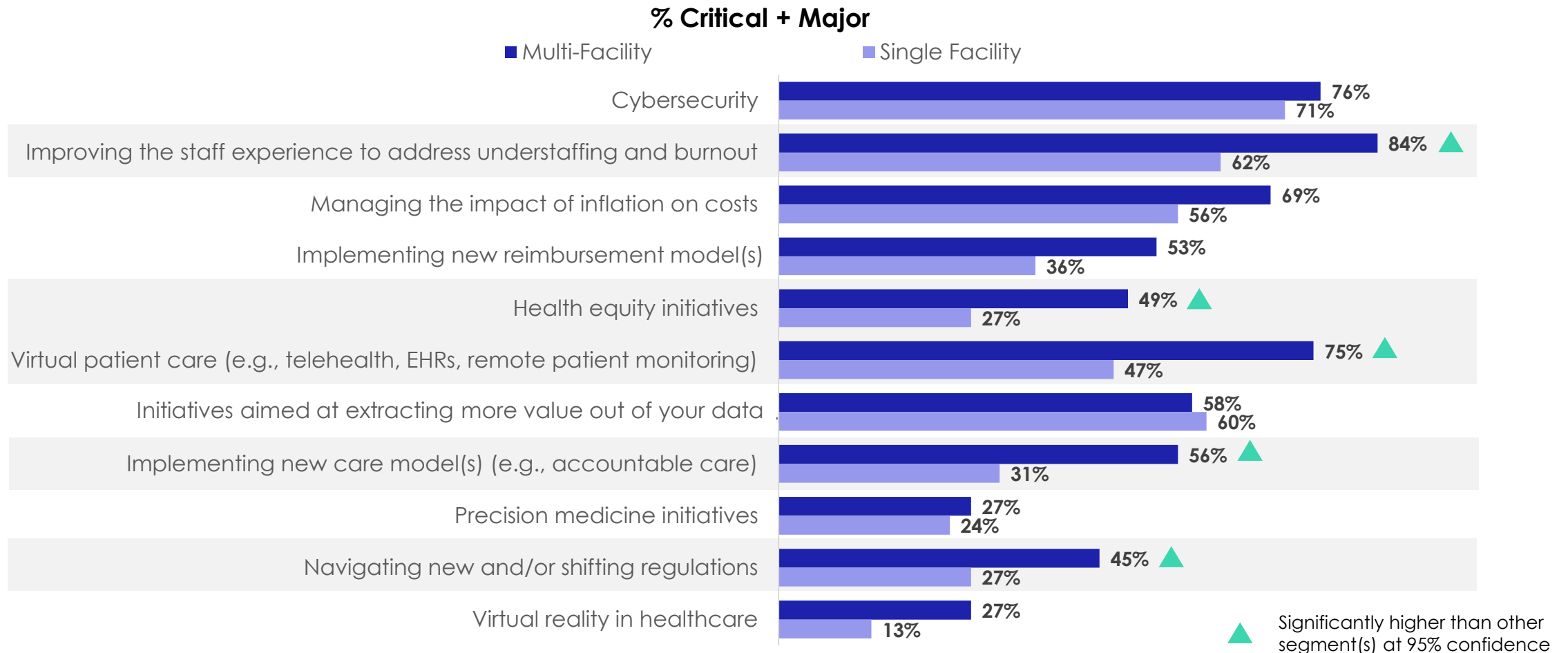
Looking ahead, three-quarters say that cybersecurity and improving the staff experience are top priorities for their organization over the next 1-2 years

In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?



The staff experience is the highest priority for multi-facility worksites; virtual patient care is also a priority for these healthcare organizations

In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?



Single Facility includes Academic medical centers, and stand-alone hospitals

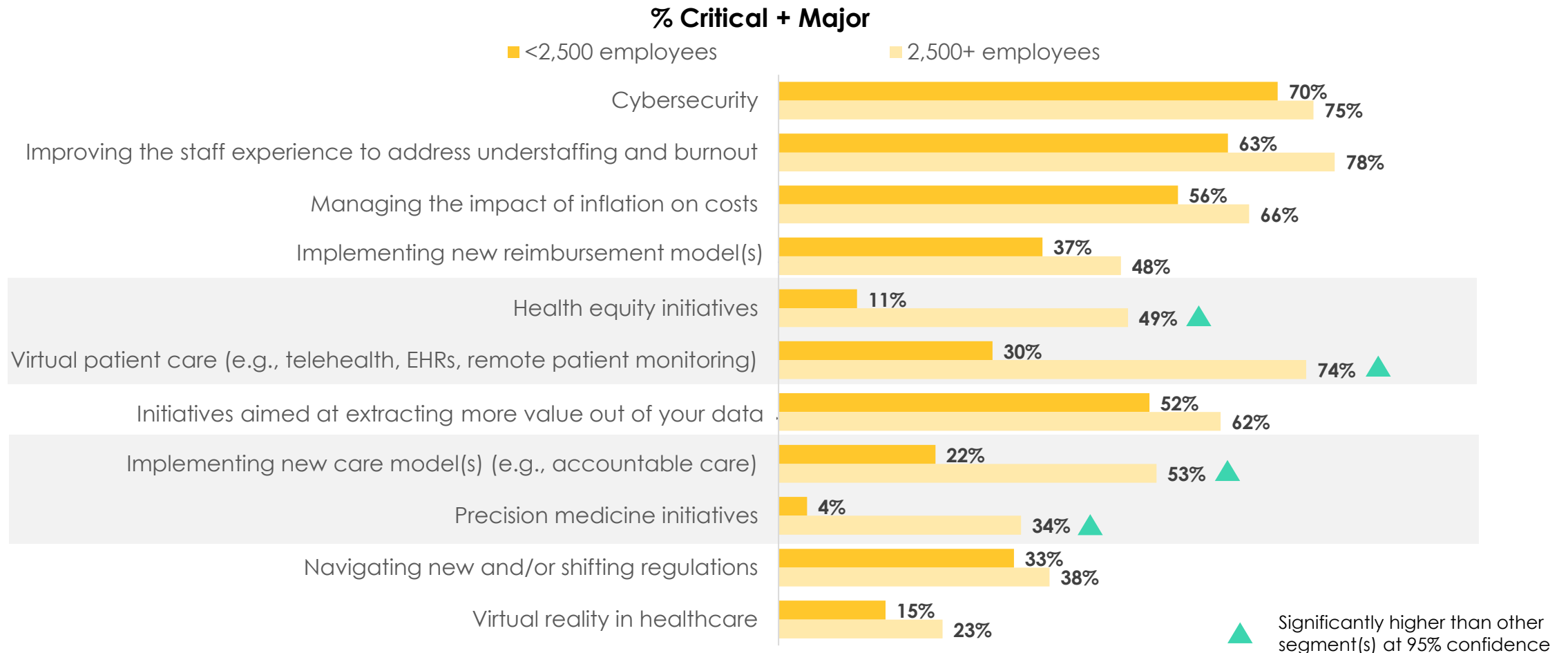
Multi-Facility includes integrated delivery networks and multi-hospital systems

Not showing results for "Something else" given low sample size (n=12)

Q8. In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?
Base: Total Respondents; n = 100

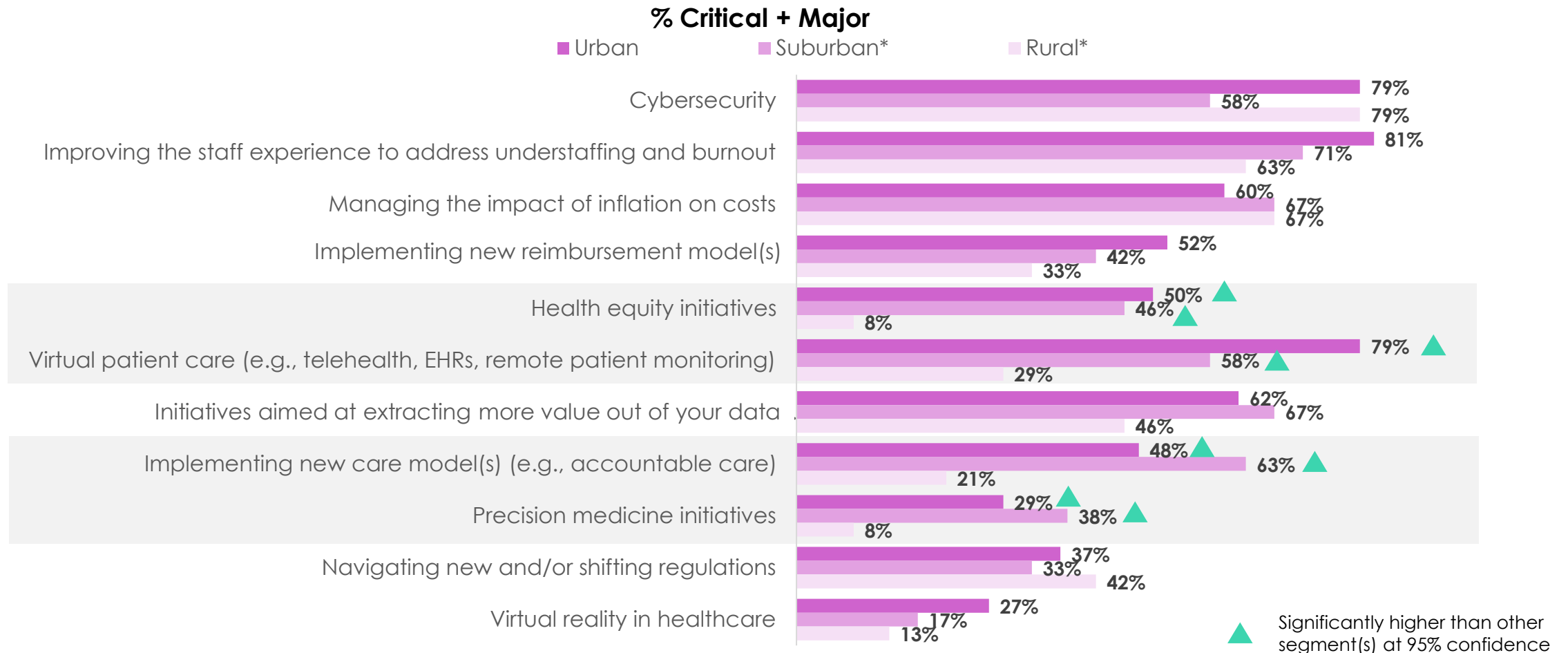
Virtual patient care is also a top priority for organizations with 2,500+ employees

In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?



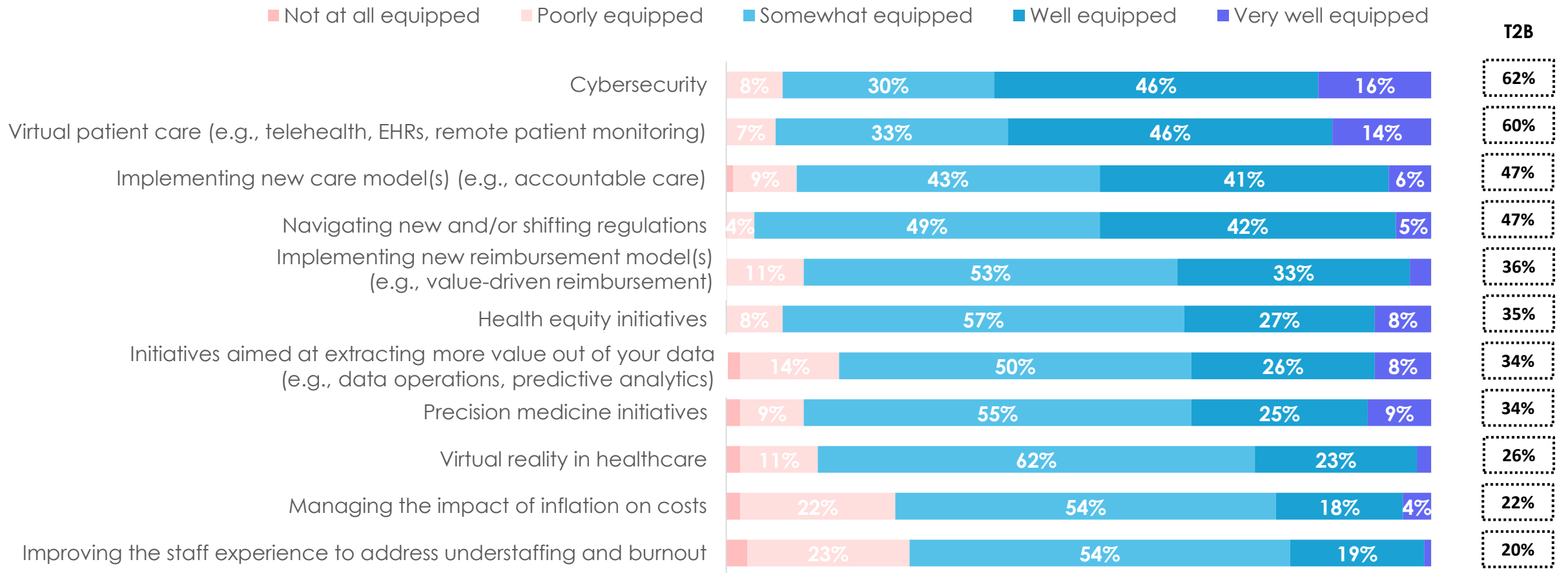
Urban health systems also rated virtual care more highly as a priority

In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?



Leaders and clinicians think their organizations are most well equipped to address cybersecurity and virtual patient care in the next 1-2 years

Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

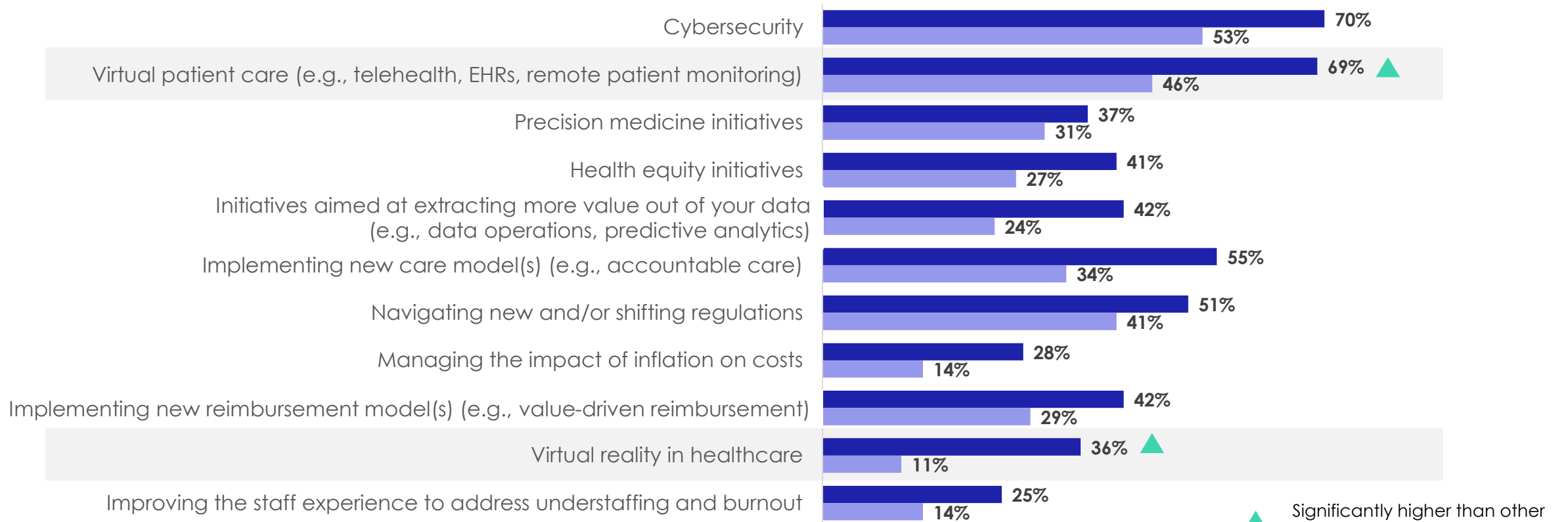


Those in multi-facility worksites are more likely to think their organization is well equipped to address virtual patient care and virtual reality in healthcare

Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

T2B: % Very Well Equipped + Well Equipped

■ Multi-Facility ■ Single Facility



▲ Significantly higher than other segment(s) at 95% confidence

Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

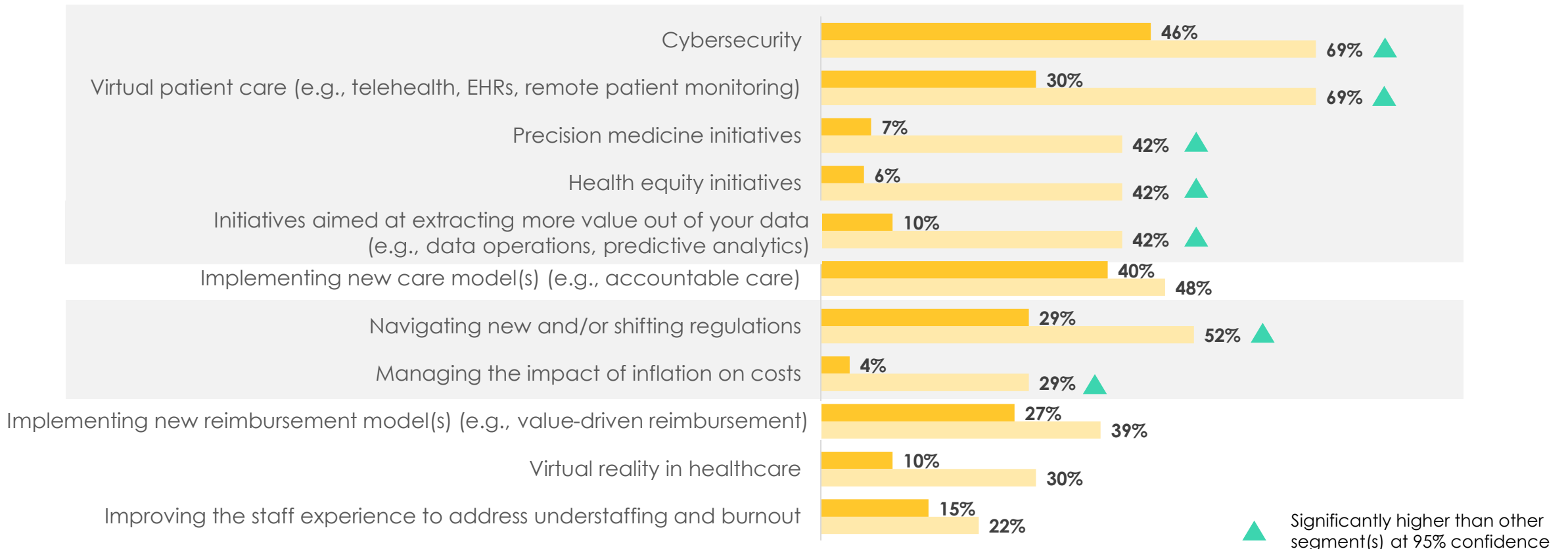
Q9. Thinking about the areas below that you indicated as important over the next 1-2 years, how well equipped do you think your organization and its leadership team are to successfully address them?
Base: Total Respondents; base varies by area

Organizations with 2,500+ employees also feel better equipped to handle several of these areas over the next couple of years

Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

T2B: % Very Well Equipped + Well Equipped

■ <2,500 employees ■ 2,500+ employees

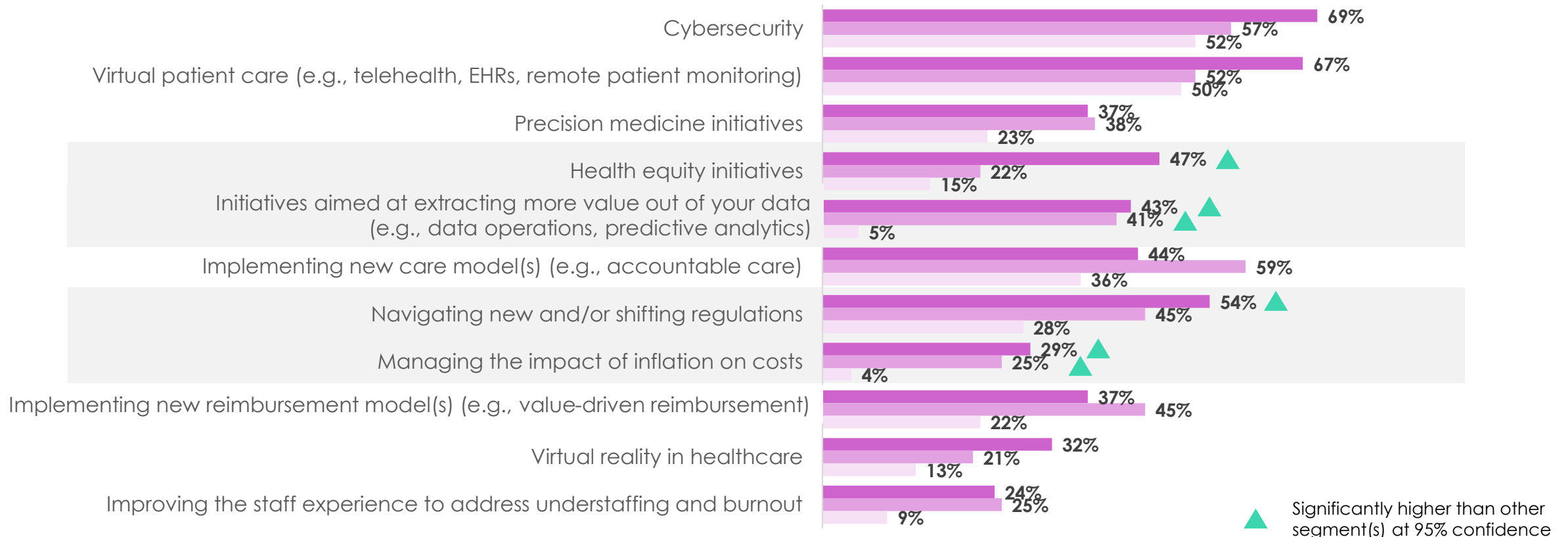


Those in urban and suburban areas feel better equipped to handle some of these important changes over the next 1-2 years as well

Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

T2B: % Very Well Equipped + Well Equipped

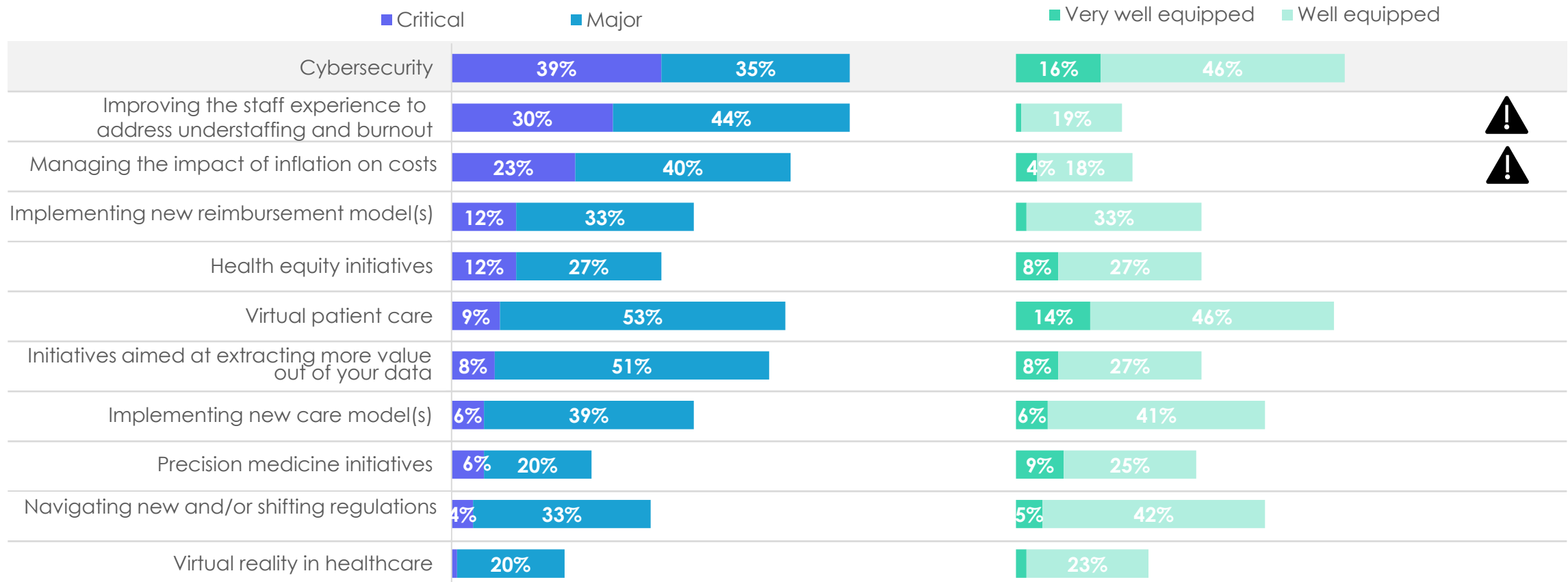
■ Urban ■ Suburban* ■ Rural*



Cybersecurity is the most critical priority for respondents over the next 1-2 years and they feel their organizations are equipped to address it; however, that is not the case for two other critical priorities, improving the staff experience and managing the impact of inflation

Priorities over next 1-2 years

How well equipped is your organization?



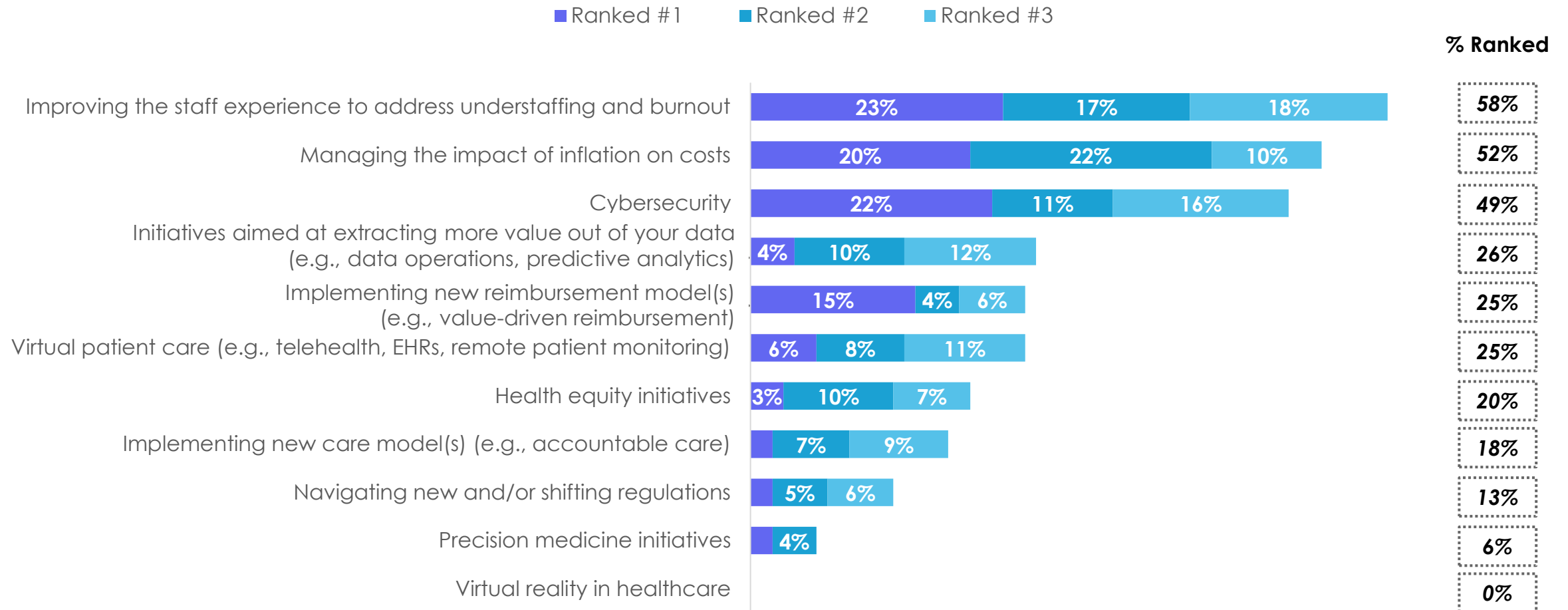
Data labels under 3% not shown

Not displaying "Something else" for Q8 given low base of n = 12

Q8. In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas? Base: Total Respondents; n = 100
 Q9. Thinking about the areas below that you indicated as important over the next 1-2 years, how well equipped do you think your organization and its leadership team are to successfully address them? Base: Total Respondents; base varies by area

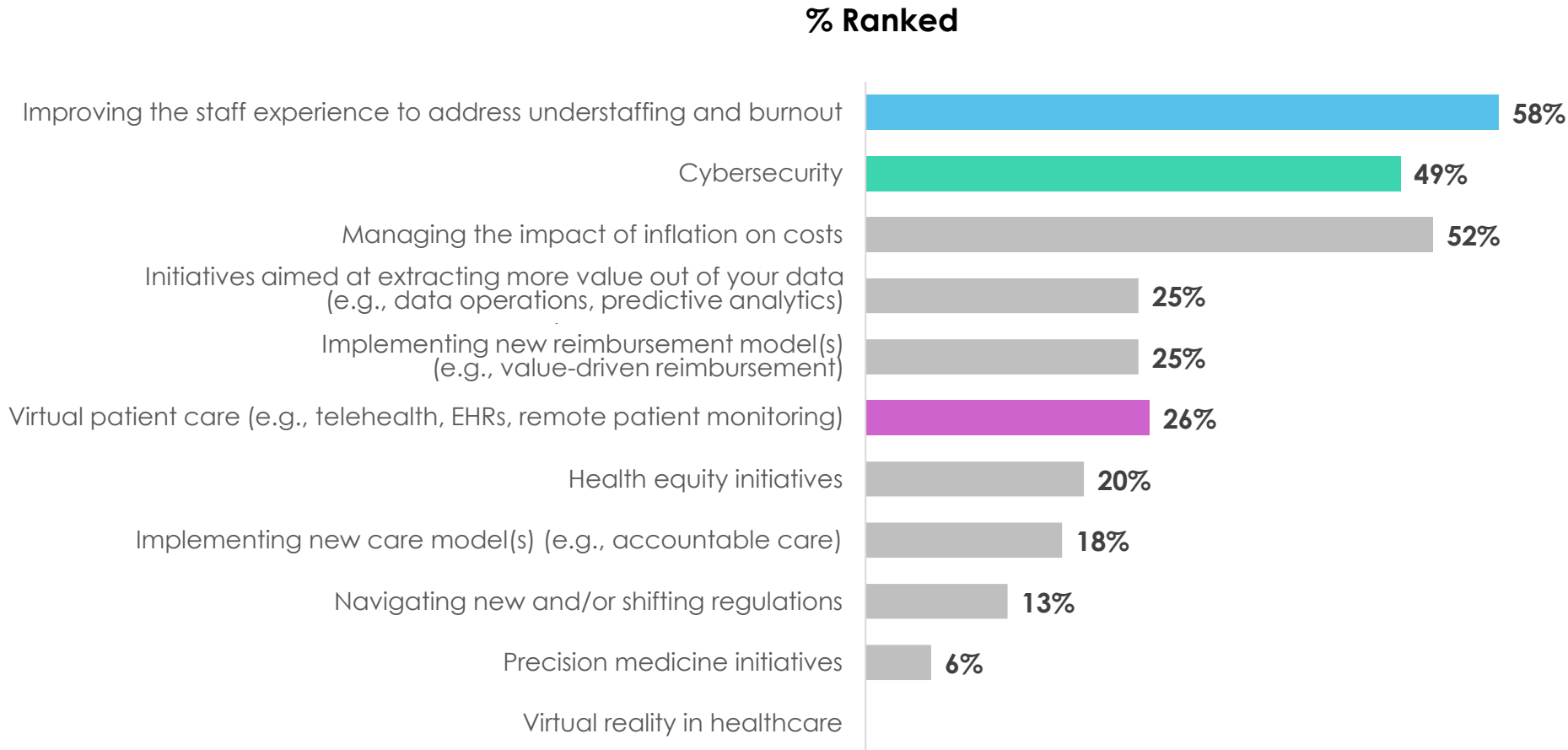
Addressing understaffing & burnout and managing the impact of inflation are ranked as the highest priorities for healthcare organizations.

How would you rank these areas in terms of priority for your organization?



Cybersecurity is particularly critical for smaller organizations

How would you rank these areas in terms of priority for your organization?



69% of those in EVP/SVP / VP/Head or System Director/ Director roles vs. 45% amongst MD/DO or C-Suite leaders

68% amongst organizations with <\$1.1B in revenue vs. 38% amongst those with revenues of \$1.1B+

63% amongst those in organizations with <2,500 employees vs. 44% in organizations with 2,500+ employees

35% of those in multi-facility worksites vs. 13% in single facility worksites



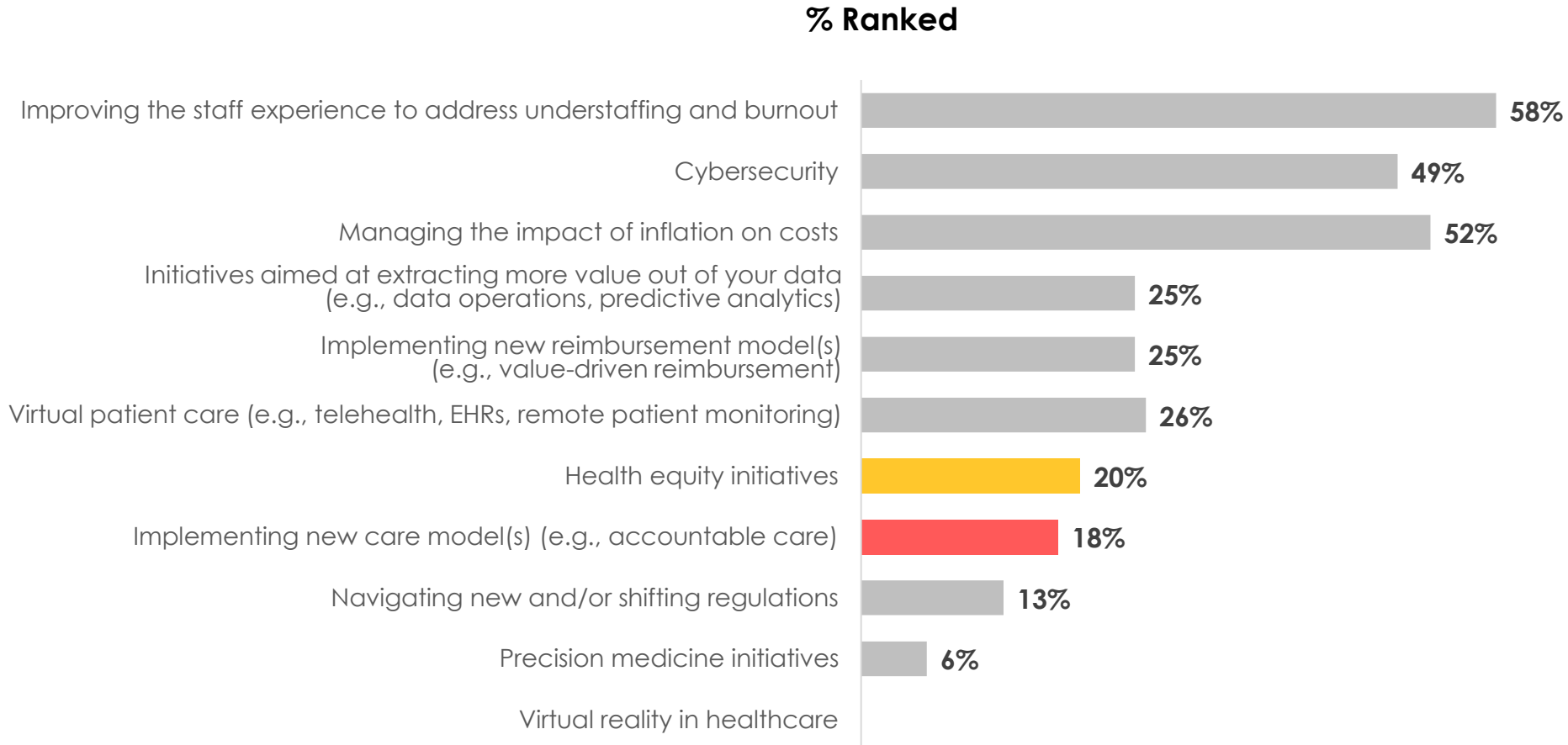
Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

Q10. How would you rank these areas in terms of priority for your organization?
Base: Total Respondents; n = 100

While those in larger organizations are more likely to see health equity initiatives and implementing new care models as priorities

How would you rank these areas in terms of priority for your organization?



28% of organizations with >1,000 hospital beds vs. 11% for organizations with 1,000 or less hospital beds

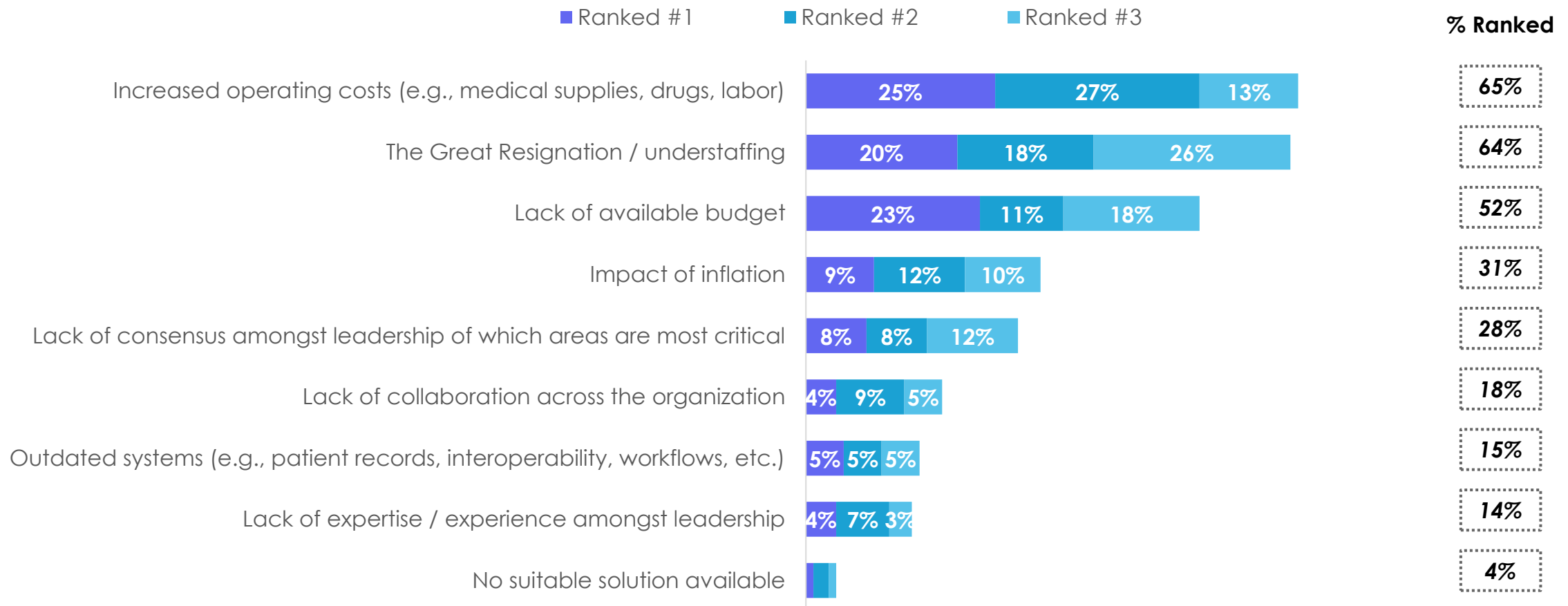
26% of organizations with 2,500+ employees vs. 4% with <2,500 employees

26% of organizations in urban or suburban areas vs. 0% amongst those in rural* settings

29% amongst organizations with revenues of \$1.1B or more vs. 9% amongst those with <\$1.1B in revenue

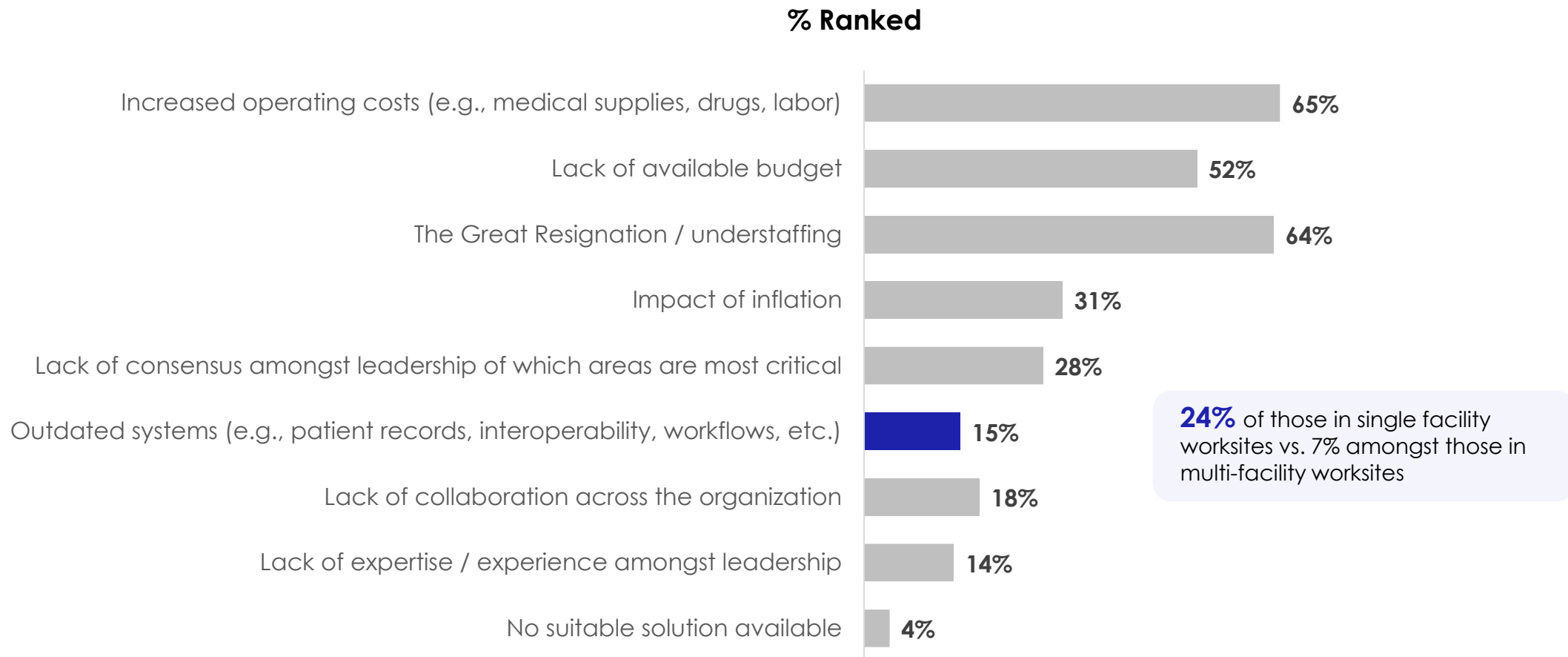
Respondents shared that increased operating costs and understaffing present the biggest roadblocks to their organization in addressing their top priorities

What are the biggest challenges or roadblocks your organization is facing in addressing these key areas over the next 1-2 years (if any)?



The impact of outdated systems is felt more strongly by those in smaller organizations

What are the biggest challenges or roadblocks your organization is facing in addressing these key areas over the next 1-2 years (if any)?



Executives, IT / technology leaders, and clinicians say their organizations will measure against their biggest roadblocks by monitoring costs / margins / cutting costs and monitoring staffing metrics (including retention, turnover, & staffing levels)

How will your organization measure these KPIs for improvement?



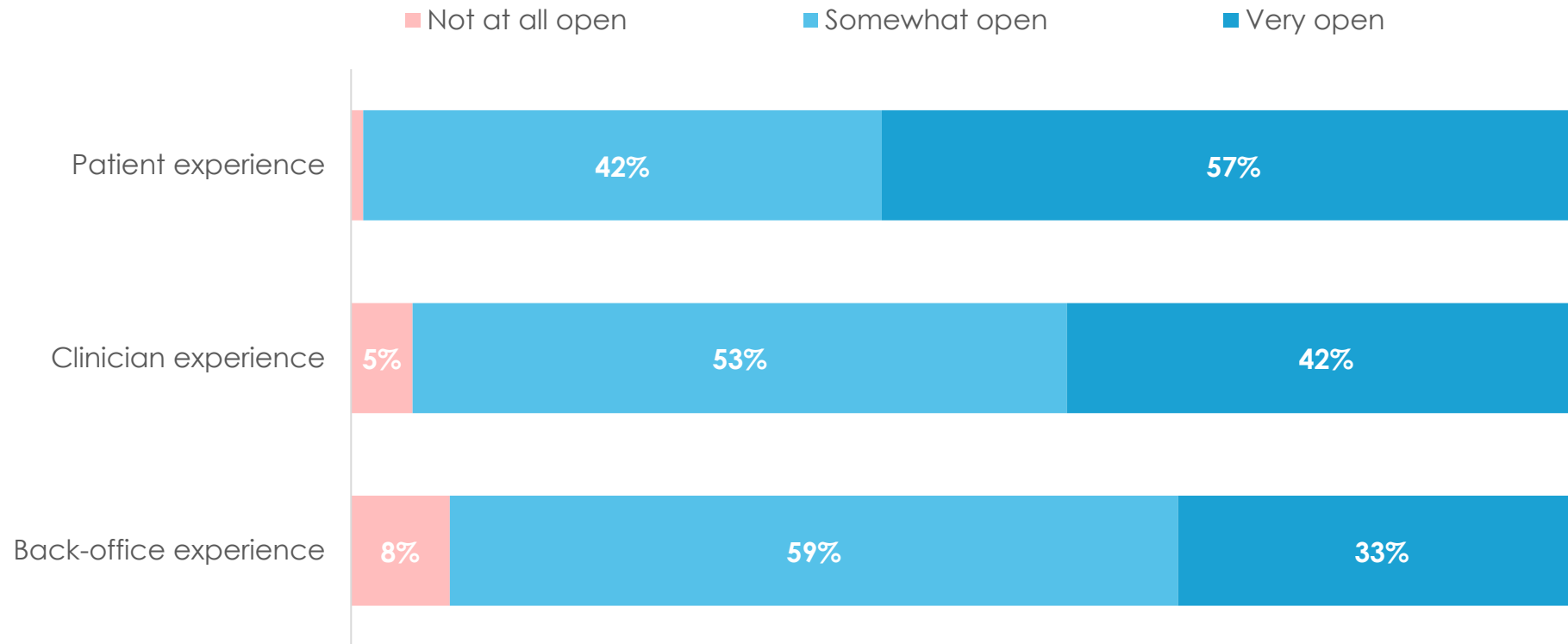
The most common measures of success stated were staff retention / reduced turnover and lower costs / improved margins; the latter was mentioned more often by those in larger organizations and among those in more populated areas

And, what is your measure of success for those KPIs?



Most executives, IT / technology leaders, and clinicians say their organization is open to adopting new technologies to improve the patient, clinician, and back-office experiences

How open would you say your organization is to adopting new technologies to improve the...



Those working at **multi-facility** worksites were more likely to say their organization is '**very open**' to adopting new technologies to improve the **patient experience**:

69% amongst those working in multi-facility worksites vs. 42% amongst those working in single facility worksites

Data labels under 3% not shown

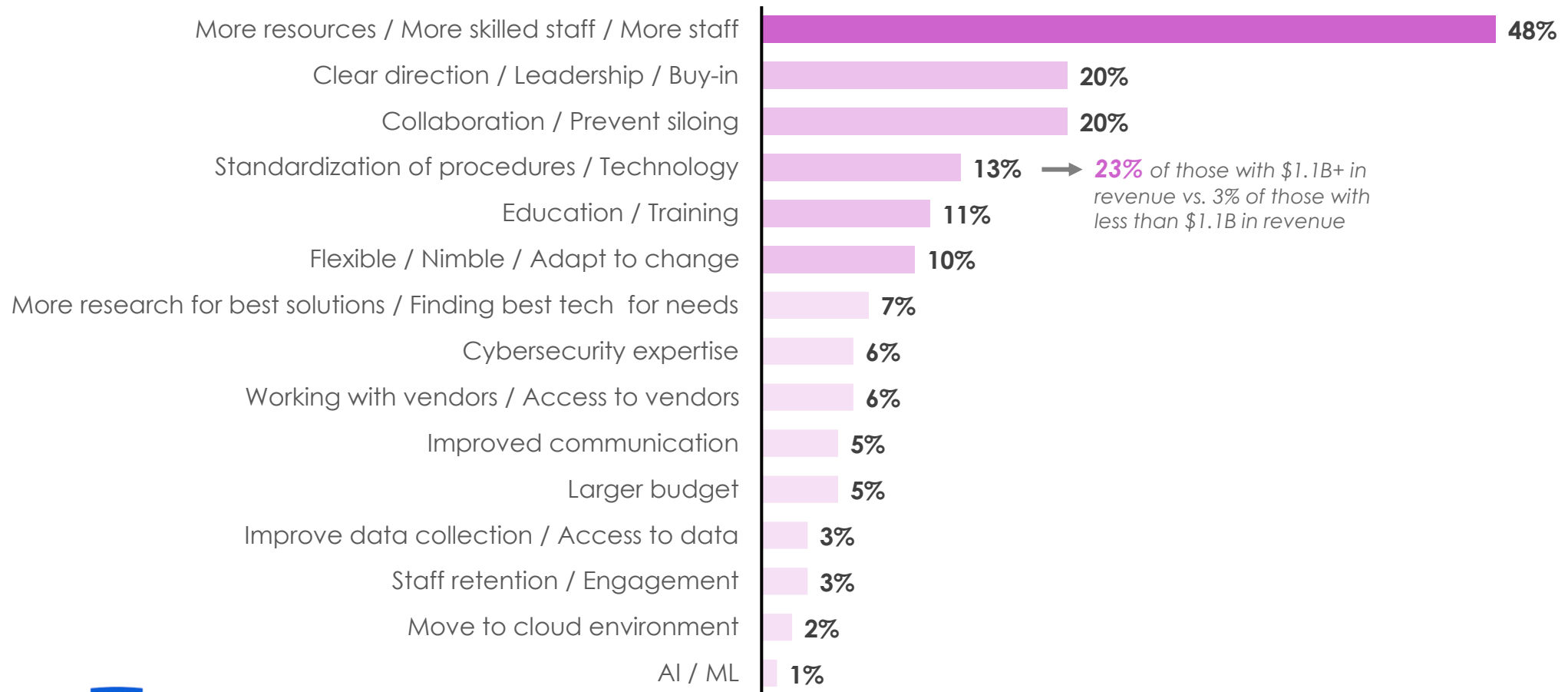
Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems



In order to be successful in implementing key technology advancements in their organization, most say they need skilled IT talent and/or more staff

What does your organization's IT team need to be successful in implementing key technology advancements, aside from budget?



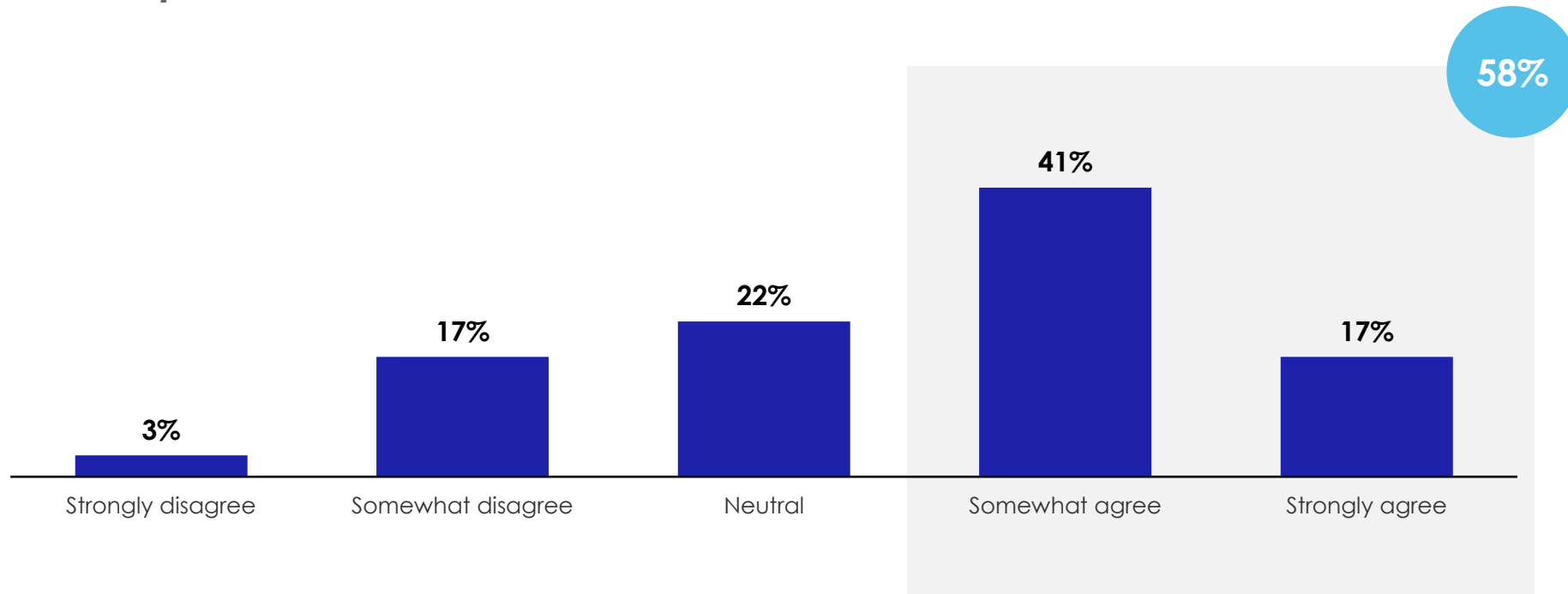
Not displayed: 'None / N/A', 5%

Q21. What does your organization's IT team need to be successful in implementing key technology advancements, aside from budget? Please provide as much detail as you can.
Base: Total Respondents; n=100; question shown as an open-end response

About 3-in-5 believe their organization is aligned on what is most important to address, from the executive team through to those in patient-facing roles

How would you rate your agreement with the following statement:

My organization is aligned on what is most important or pressing to address, from the executive leadership team through to patient-facing roles, including doctors, clinicians, and nurse practitioners.



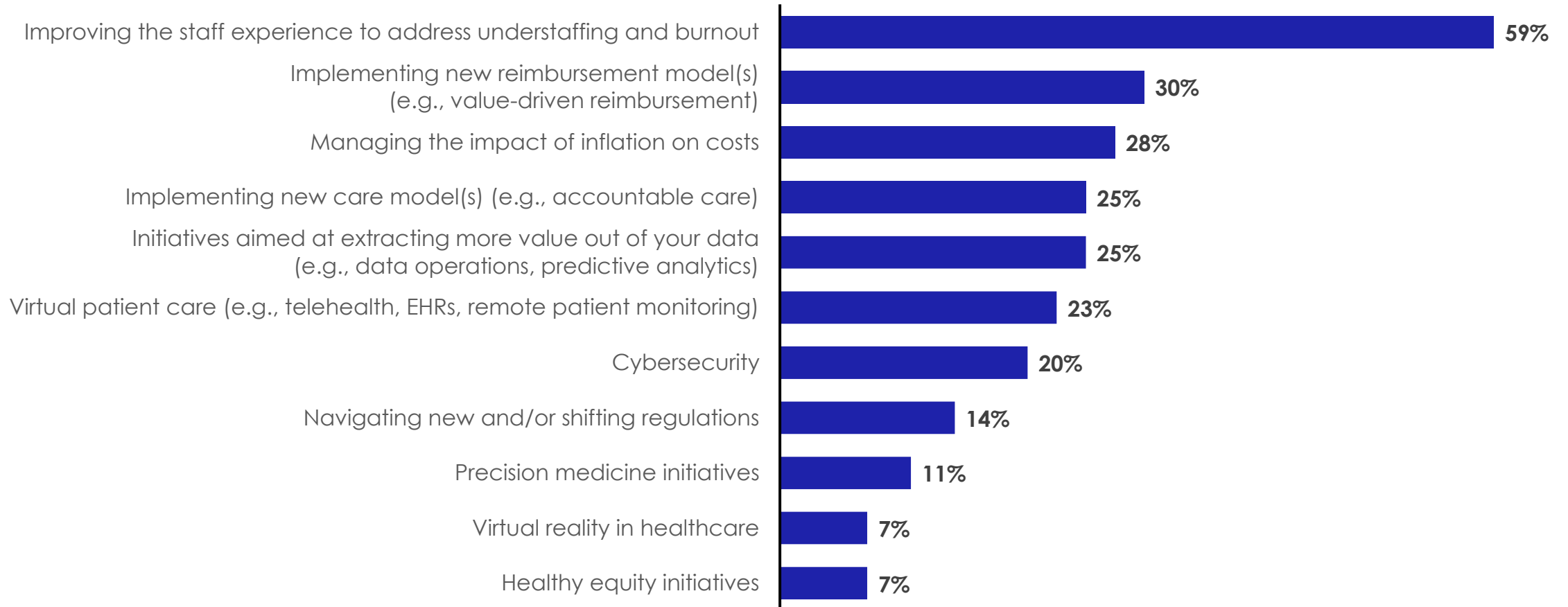
Those in **EVP/SVP, VP/Head, or System Director/Director** roles and those in organizations with **2,500+ employees** are more likely to report their organization is aligned:

71% of EVP/SVP, VP/Head, and System Director/Director roles agree vs. 45% of MD/DO and C-suite leaders

64% of those in organizations with 2,500+ employees vs. 41% of those in organizations with <2,500 employees

The greatest source of misalignment is the goal of improving the staff experience to address understaffing & burnout

Which areas are sources of the most misalignment?

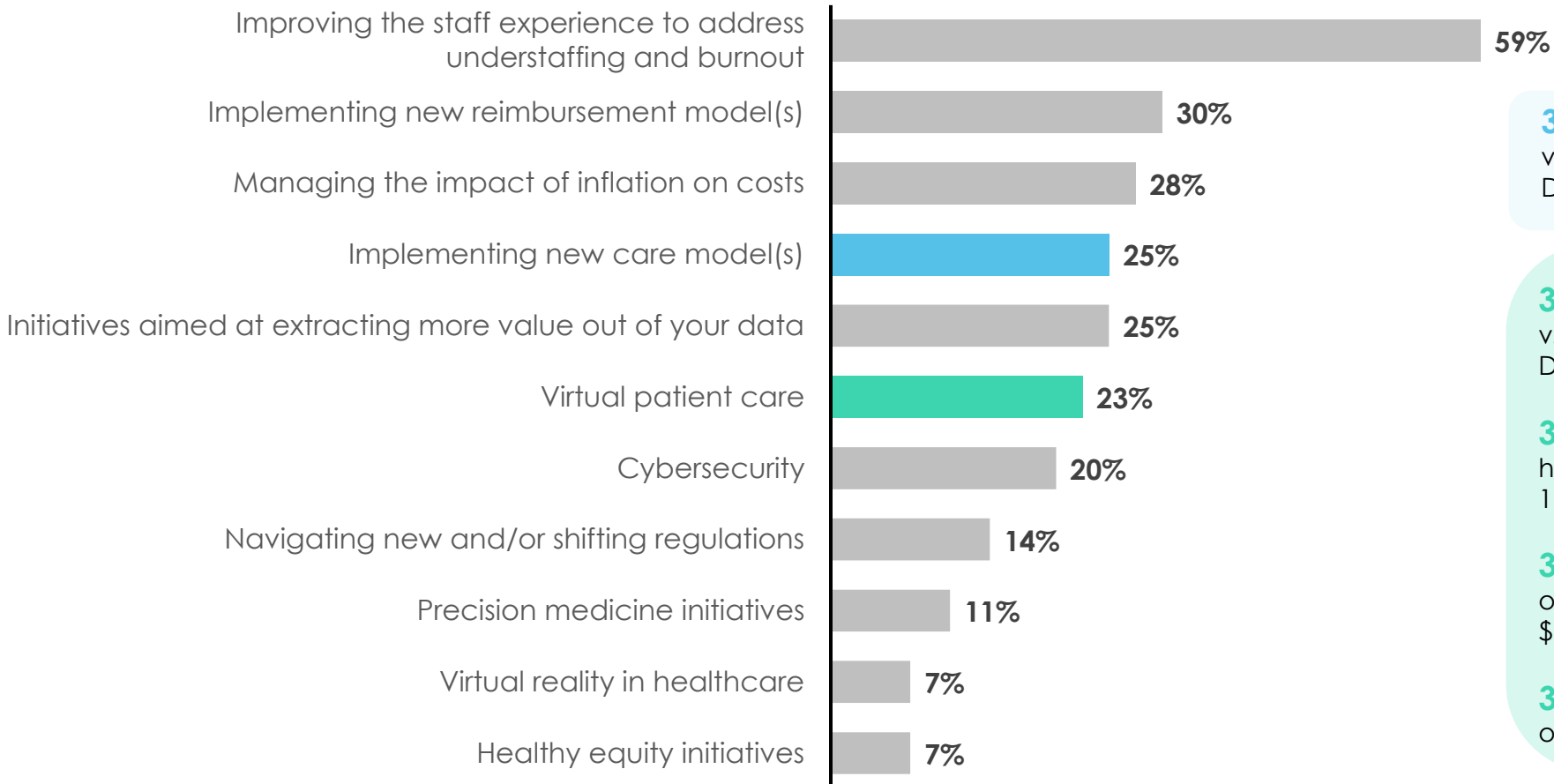


Not displayed: "Other", 6%

Q15. You said that your organization is strongly / somewhat / impartial in disagreement / somewhat in agreement. Which areas are sources of the most misalignment? Please select all that apply. Base: Total Respondents; n=83, those who did not select "strongly agree" in previous question

Those in executive roles are more likely to say that the goals of implementing new care model(s) and virtual patient care are also sources of the most misalignment in their organization

Which areas are sources of the most misalignment?



39% amongst those in MD/DO or C-suite roles vs. 13% of those in EVP/SVP, VP/Head, or System Director/Director roles

34% amongst those in MD/DO or C-suite roles vs. 8% of those in EVP/SVP, VP/Head, or System Director/Director roles

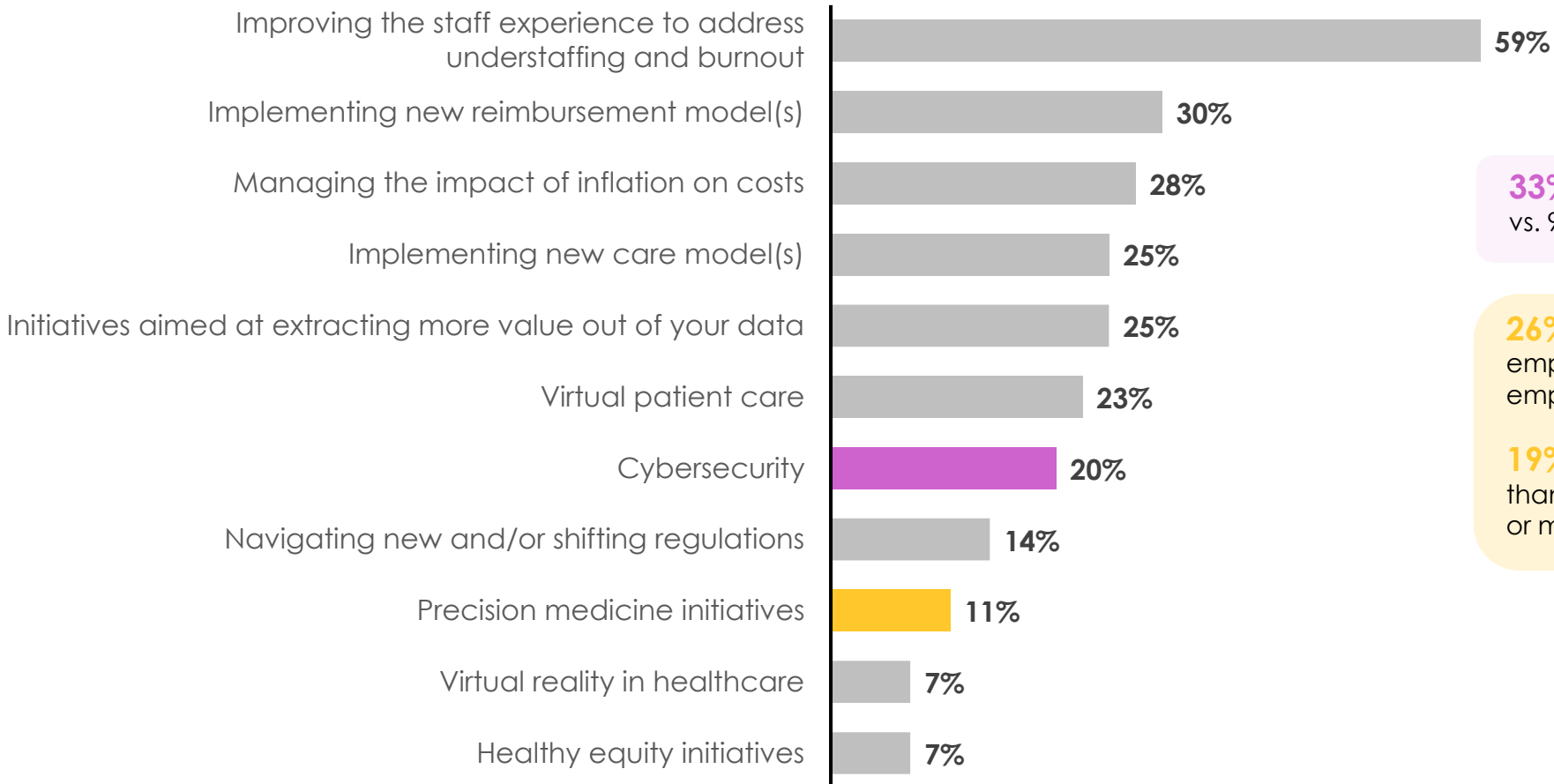
32% amongst organizations with >1,000 hospital beds vs. 11% of those with less than 1,000 beds

32% in organizations whose revenues are \$1.1B or more vs. 8% in those with revenues below \$1.1B

30% amongst those in organizations in urban or suburban settings vs. 5% in rural* settings

Cybersecurity is more often a source of misalignment in single facility worksites, while precision medicine initiatives appear to cause more misalignment in smaller organizations

Which areas are sources of the most misalignment?



33% amongst those in single facility worksites vs. 9% of those in multi-facility worksites

26% amongst organizations with <2,500 employees vs. 5% of those with 2,500+ employees

19% in organizations whose revenues are less than \$1.1B vs. 2% in those with revenues of \$1.1B or more

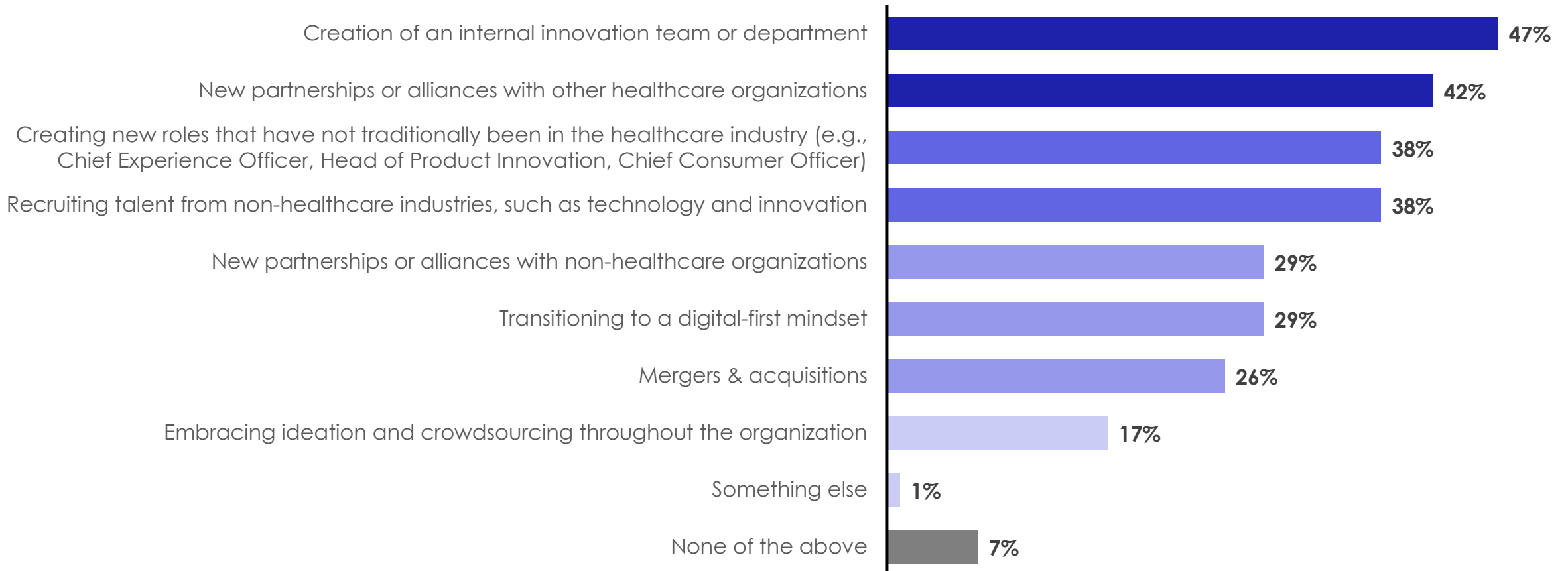


Single Facility includes Academic medical centers, and stand-alone hospitals
Multi-Facility includes integrated delivery networks and multi-hospital systems

Q15. You said that your organization is strongly / somewhat / impartial in disagreement / somewhat in agreement. Which areas are sources of the most misalignment? Please select all that apply. Base: Total Respondents; n=83, those who did not select "strongly agree" in previous question

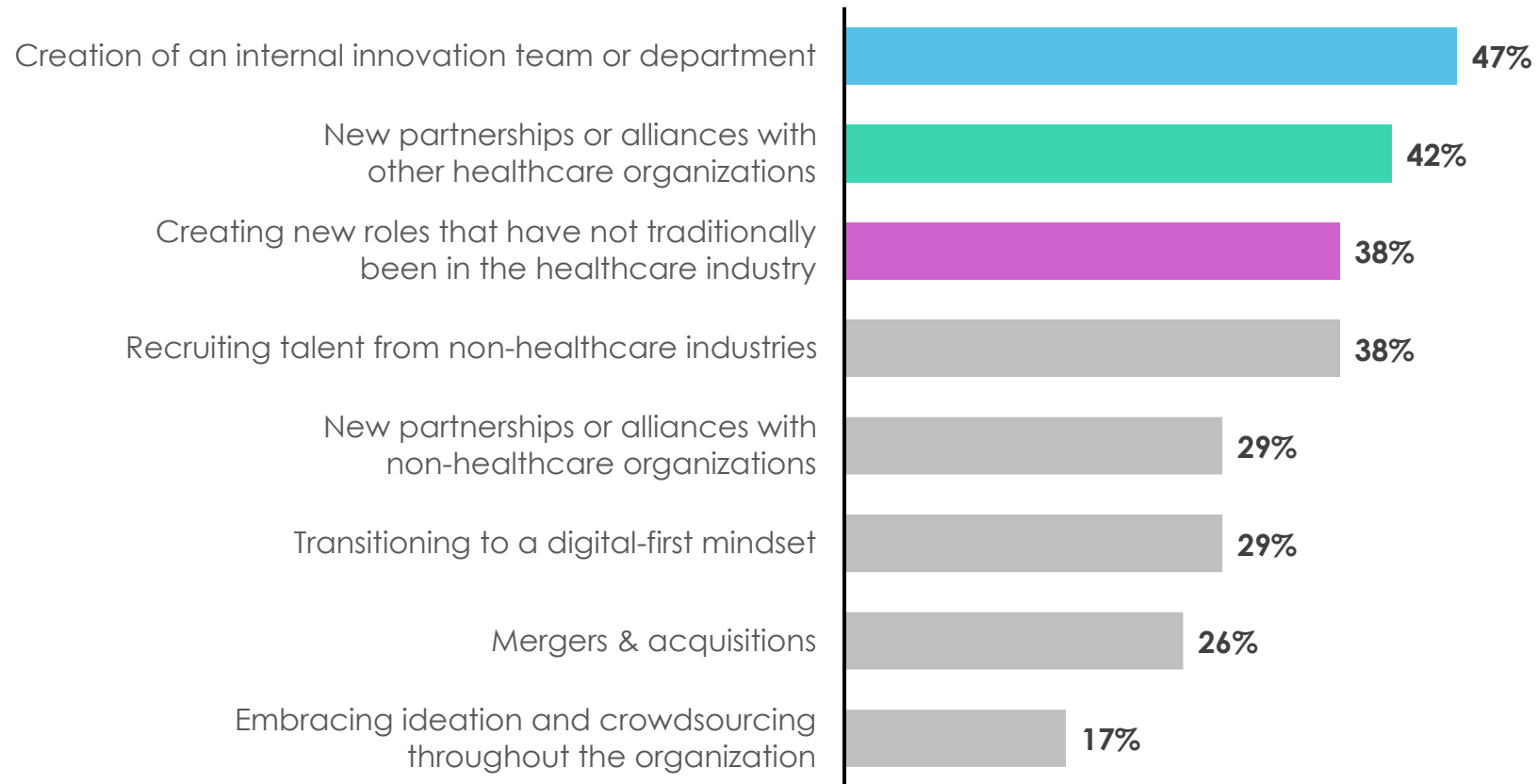
Organizations appear to be considering a variety of strategies to aid their transformation initiatives, including creating an internal innovation team / department and developing new partnerships or alliances with other healthcare organizations

Which of the following strategies, if any, have been considered, are currently being considered, by your organization?



Larger organizations are more likely to say they have considered creating an internal innovation team or department, while smaller organizations more often mentioned new partnerships or alliances with other healthcare organizations

Which of the following strategies, if any, have been considered, are currently being considered, by your organization?



53% of those whose organizations have 2,500+ employees vs. 30% of those with <2,500 employees

59% in organizations with <2,500 employees vs. 36% for those with 2,500+ employees

56% in organizations with <\$3B in revenue vs. 25% with \$3.1B+

52% of organizations with \$1.1B+ in revenue vs. 26% with <\$1.1B in revenue

47% of those in multi-facility worksites vs. 27% in single facility worksites



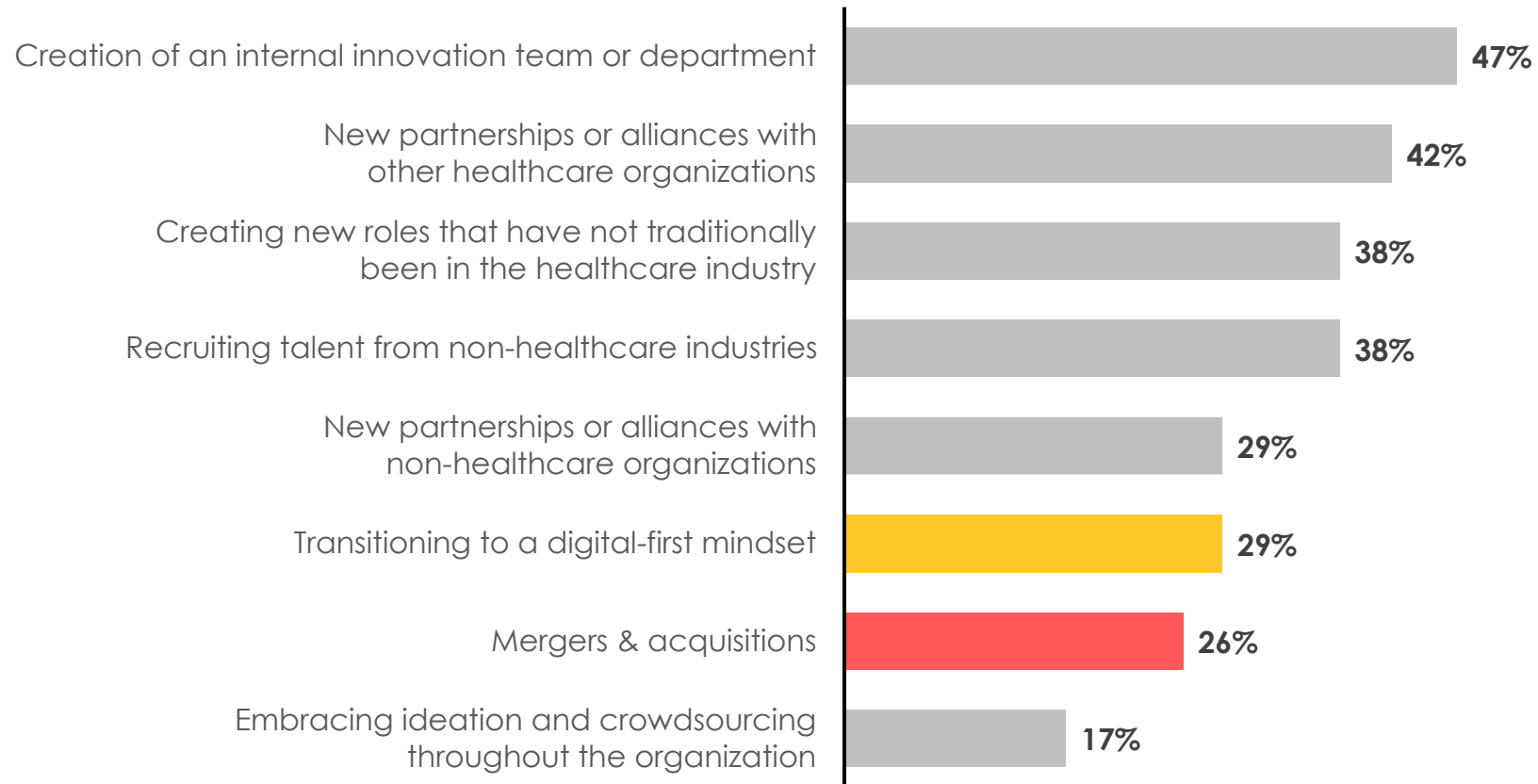
Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

Q26. Below are some strategies healthcare systems may implement to transform their organization and stay at the forefront of the industry. Which of the following, if any, have been considered, or are currently being considered, by your organization?
Base: Total Respondents; n=100

Those in larger organizations were also more likely to mention transitioning to a digital-first mindset and mergers & acquisitions as strategies they have considered or are currently considering to transform their organization

Which of the following strategies, if any, have been considered, are currently being considered, by your organization?



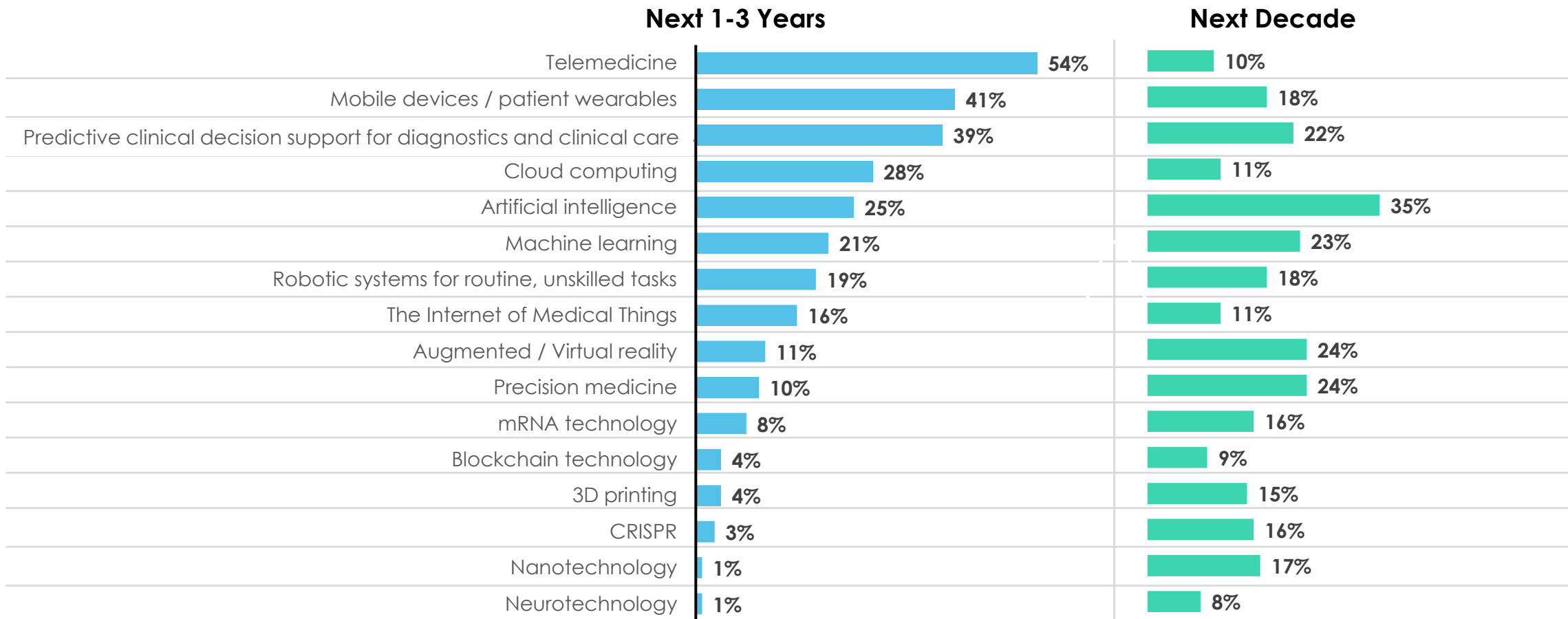
38% of organizations with \$1.1B+ in revenue vs. 12% of those with <\$1.1B in revenue

37% of organizations with 2,500+ employees vs. 7% with <2,500 employees

32% of those whose organizations have 2,500+ employees vs. 11% of those with <2,500 employees

Respondents were most likely to say telemedicine will have the greatest impact on their organization over the next few years and artificial intelligence over the next decade

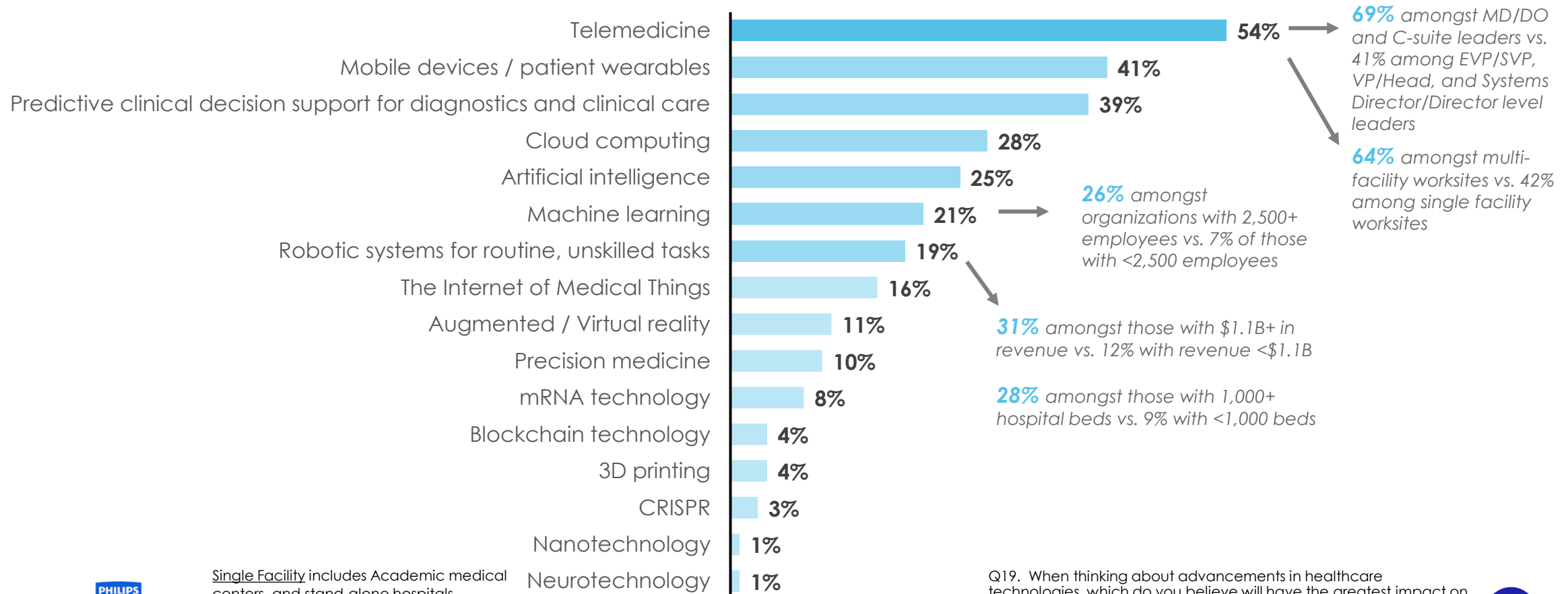
When thinking about advancements in healthcare technologies, which do you believe will have the greatest impact on your organization over the next few years? What about over the next decade?



Those in multi-facility worksites and executive-level leaders are more likely to see telemedicine as the most impactful technological advancement for their organization over the next few years

When thinking about advancements in healthcare technologies, which do you believe will have the greatest impact on your organization over the next few years?

Next 1-3 Years



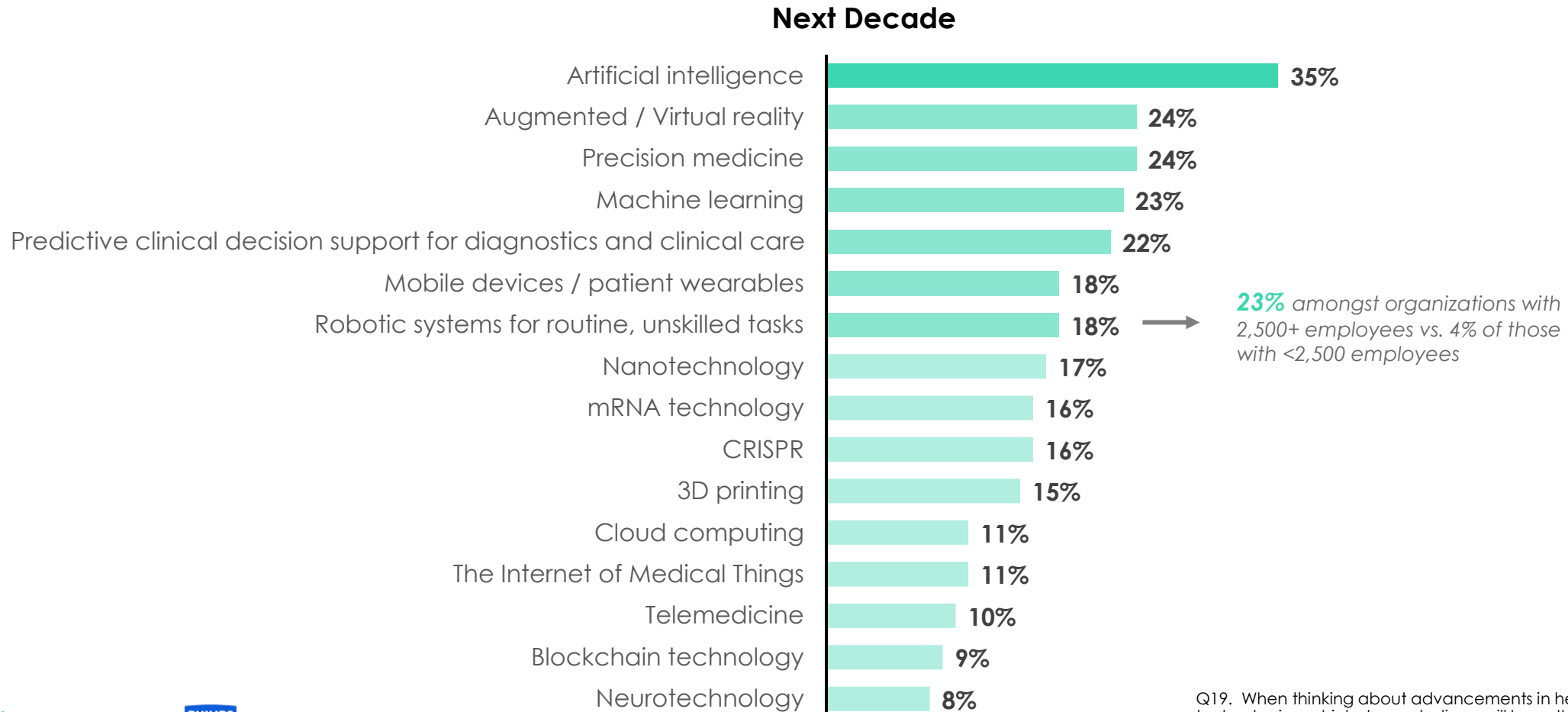
Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

Q19. When thinking about advancements in healthcare technologies, which do you believe will have the greatest impact on your organization over the next few years? What about over the next decade? Please select up to three technologies that you see having the greatest impact in each column.
Base: Total Respondents; n=100

Larger organizations are more likely to see 'robotic systems for routine, unskilled tasks' as an impactful technological advancement for their organization over the next decade

When thinking about advancements in healthcare technologies, which do you believe will have the greatest impact on your organization over the next decade?

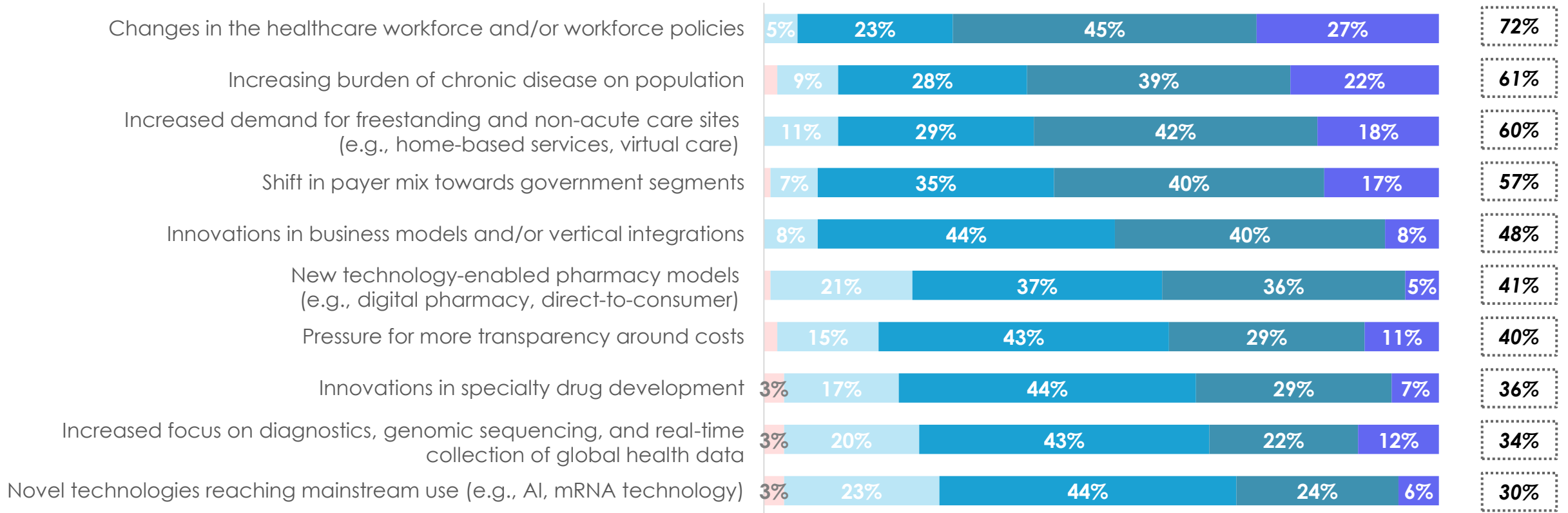


When asked about what will have the greatest impact over the next decade, leaders and clinicians were most likely to agree that changes in the workforce, the increasing burden of chronic disease, and an increased demand for alternate care sites will play the largest role

In looking to the future, which of the following do you think will have the greatest impact or play the largest role for your organization over the next decade?

■ Not at all impactful
 ■ Minimally impactful
 ■ Moderately impactful
 ■ Very impactful
 ■ Extremely impactful

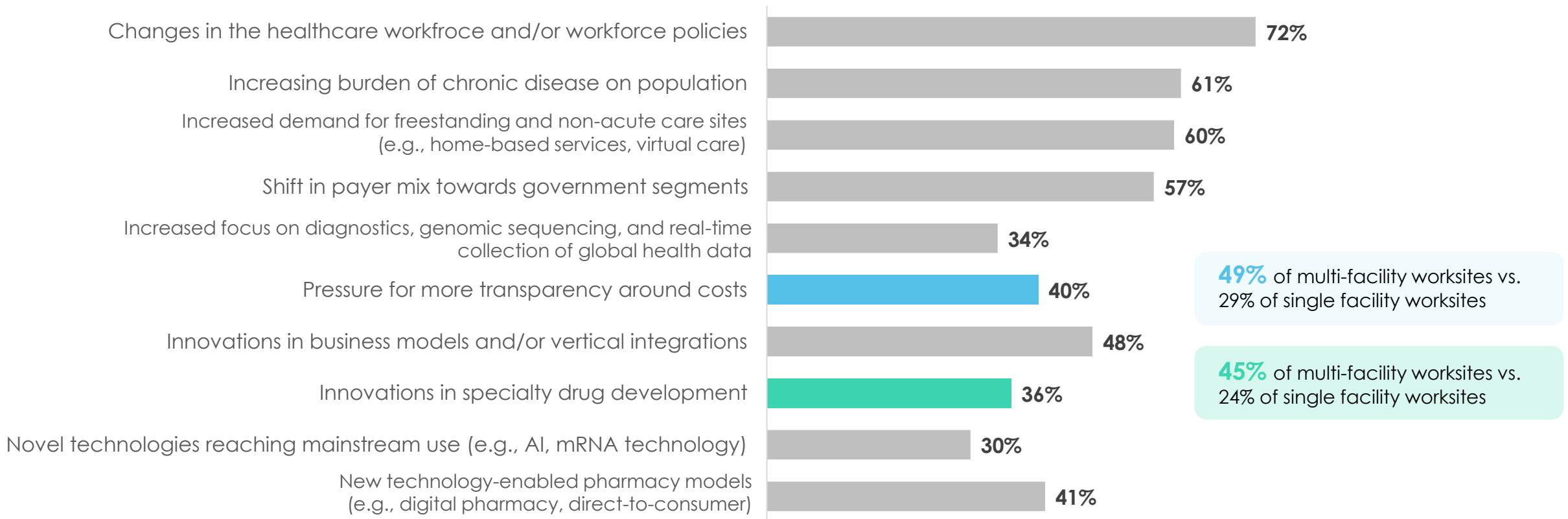
T2B



Those in multi-facility worksites were more likely to agree that the pressure for more transparency around costs and innovations in specialty drug development will play a large role over the next decade

In looking to the future, which of the following do you think will have the greatest impact or play the largest role for your organization over the next decade?

T2B: % Extremely + Very Impactful



Single Facility includes Academic medical centers, and stand-alone hospitals

Multi-Facility includes integrated delivery networks and multi-hospital systems

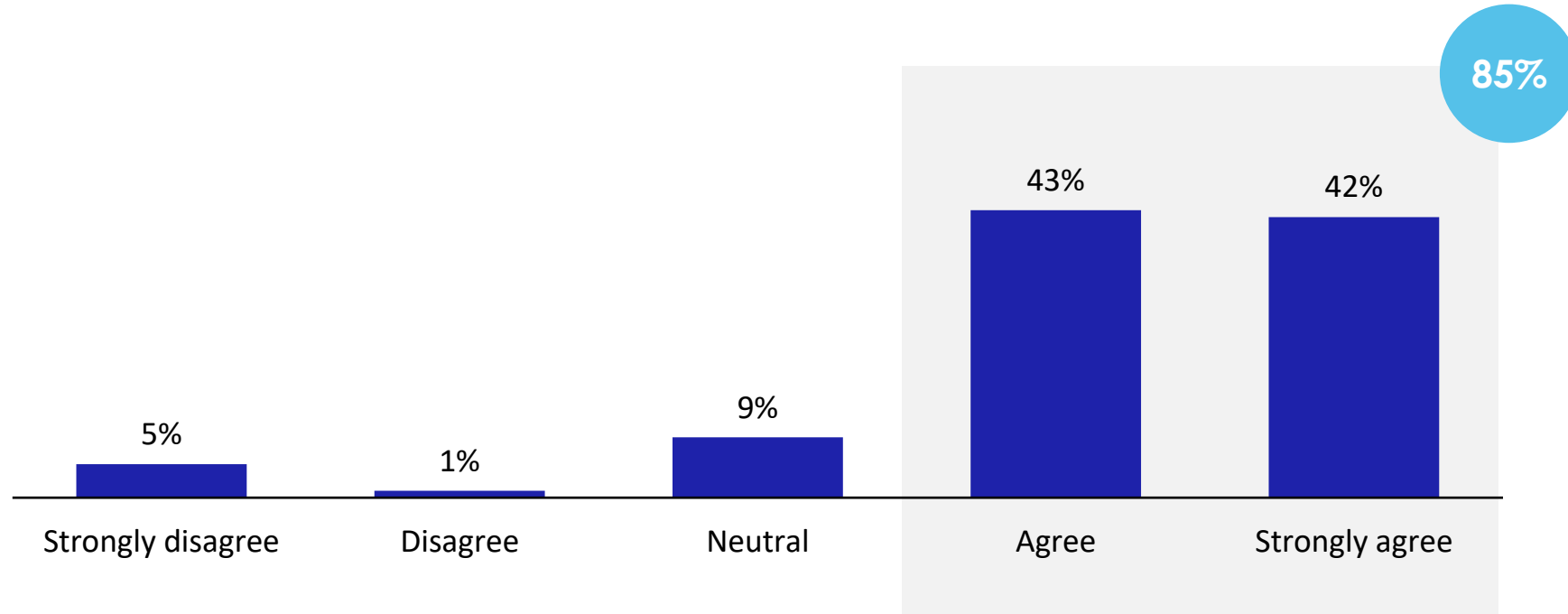


Q27. In looking to the future, which of the following do you think will have the greatest impact or play the largest role for your organization over the next decade?
Base: Total Respondents; n = 100

Over 8-in-10 executives, IT / technology leaders, and clinicians agree that there is an increasing need for non-traditional training across roles to support transformation initiatives

How much do you agree or disagree with the following statement:

There is an increasing need for non-traditional training across roles (e.g., new technology training for clinicians) to ensure our transformation initiatives are most effectively implemented throughout the organization.

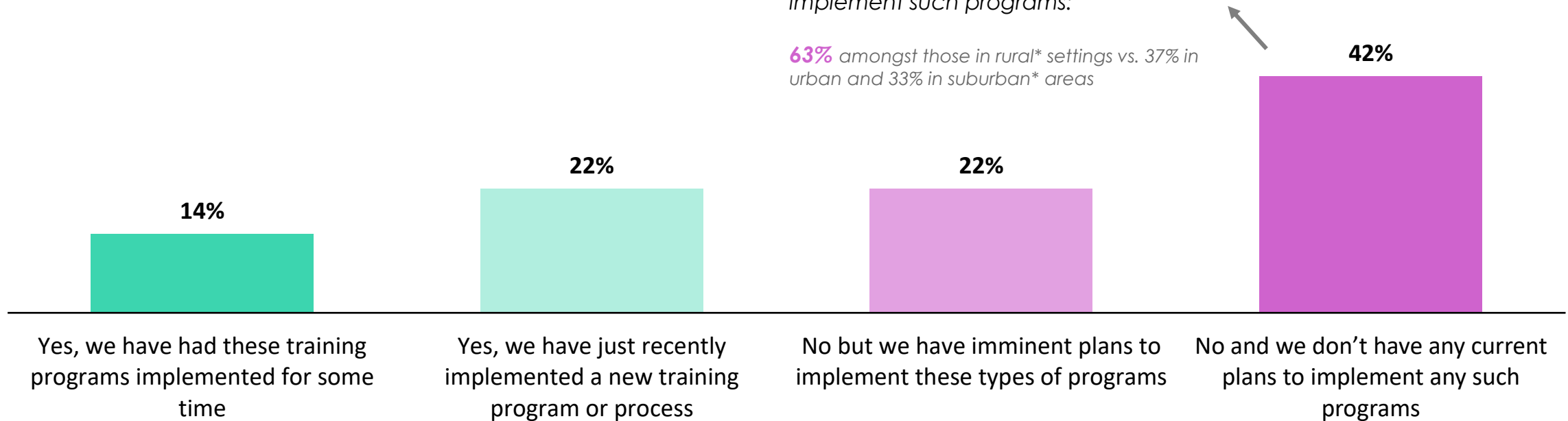


But nearly two-thirds say they do not have any such training programs in place today; those in rural settings are most likely to say they have no plans to implement such programs despite agreeing that there is a need for them

Does your organization currently have any training programs or processes in place to ensure non-traditional skills (e.g., technology) are being developed to support transformation initiatives?

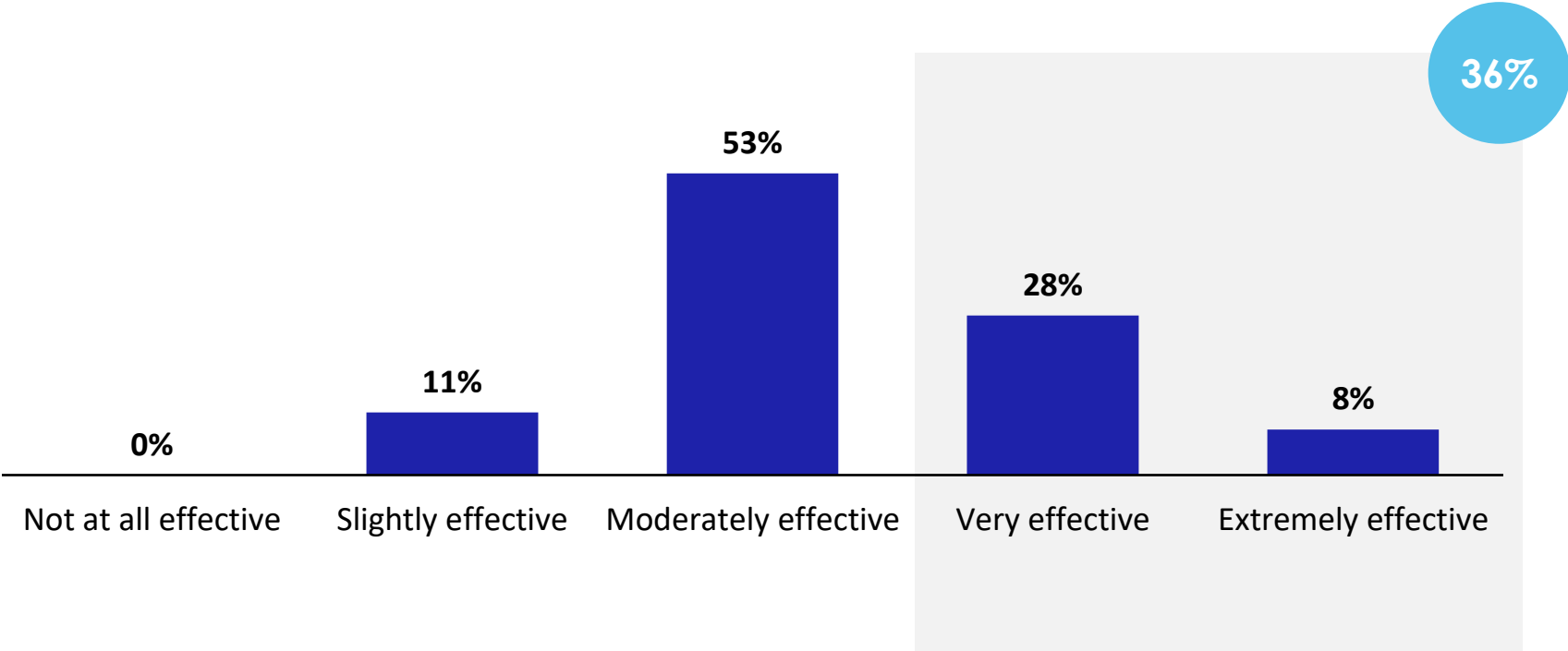
Organizations in **rural* settings** are more likely to say they have **no plans** to implement such programs:

63% amongst those in rural* settings vs. 37% in urban and 33% in suburban* areas



Among those who do have training programs in place, just over a third believe they are effective for ensuring they are maximizing their transformation investments; the majority believe they are only moderately effective

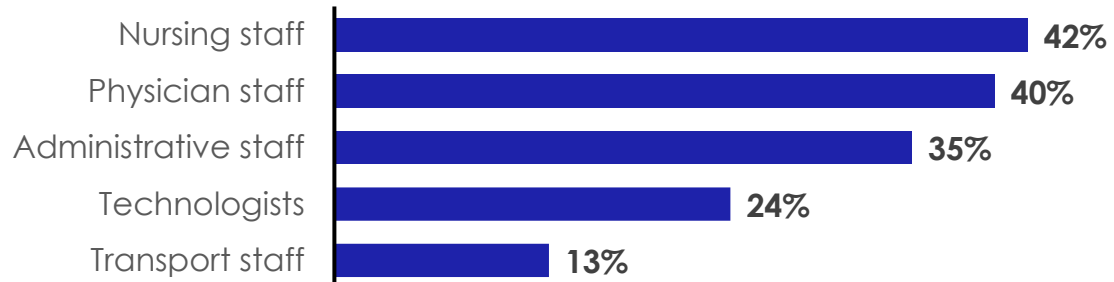
How effective do you believe your current training programs or processes are for ensuring transformation investments are maximized?



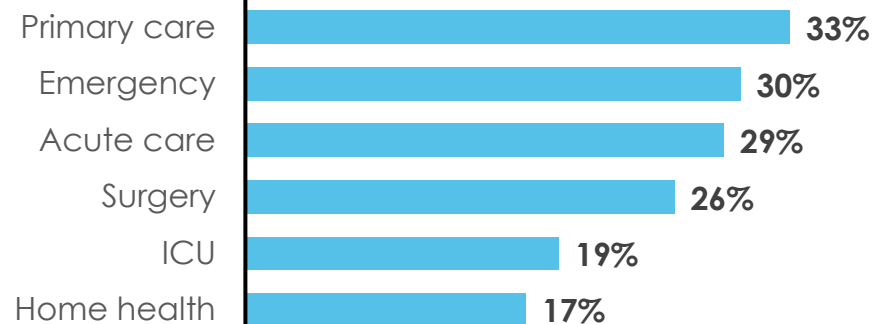
When asked which areas are most important to apply automation standardization in their organizations, over 7-in-10 mentioned staffing and various clinical care areas

Where is it most important to apply automation standardization to your operations and clinical environments?

Staffing
79%



Clinical Care
71%



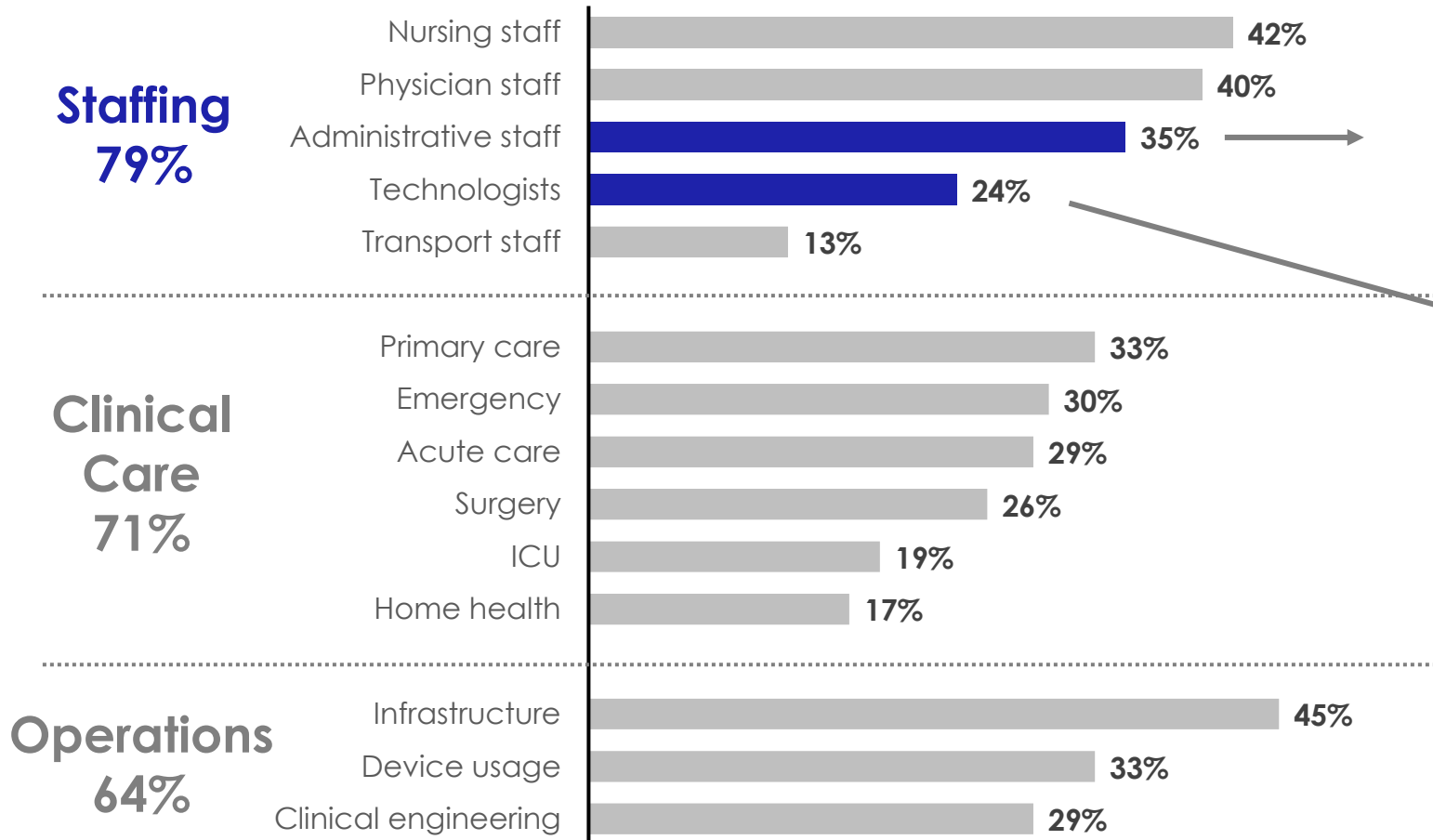
Operations
64%



Average of **four** areas selected as being the most important to apply automation standardization

Those in larger organizations were more likely to mention administrative staff and technologists as the most important areas to apply such standardization

Where is it most important to apply automation standardization to your operations and clinical environments?



Administrative staff mentioned more often by those in organizations with **revenues of \$1.1B+** or with **more than 1,000 hospital beds**:

50% amongst those with revenues of \$1.1B+ vs. 12% with <\$1.1B in revenue

44% amongst those with 1,000+ hospital beds vs. 24% of those with <1,000 beds

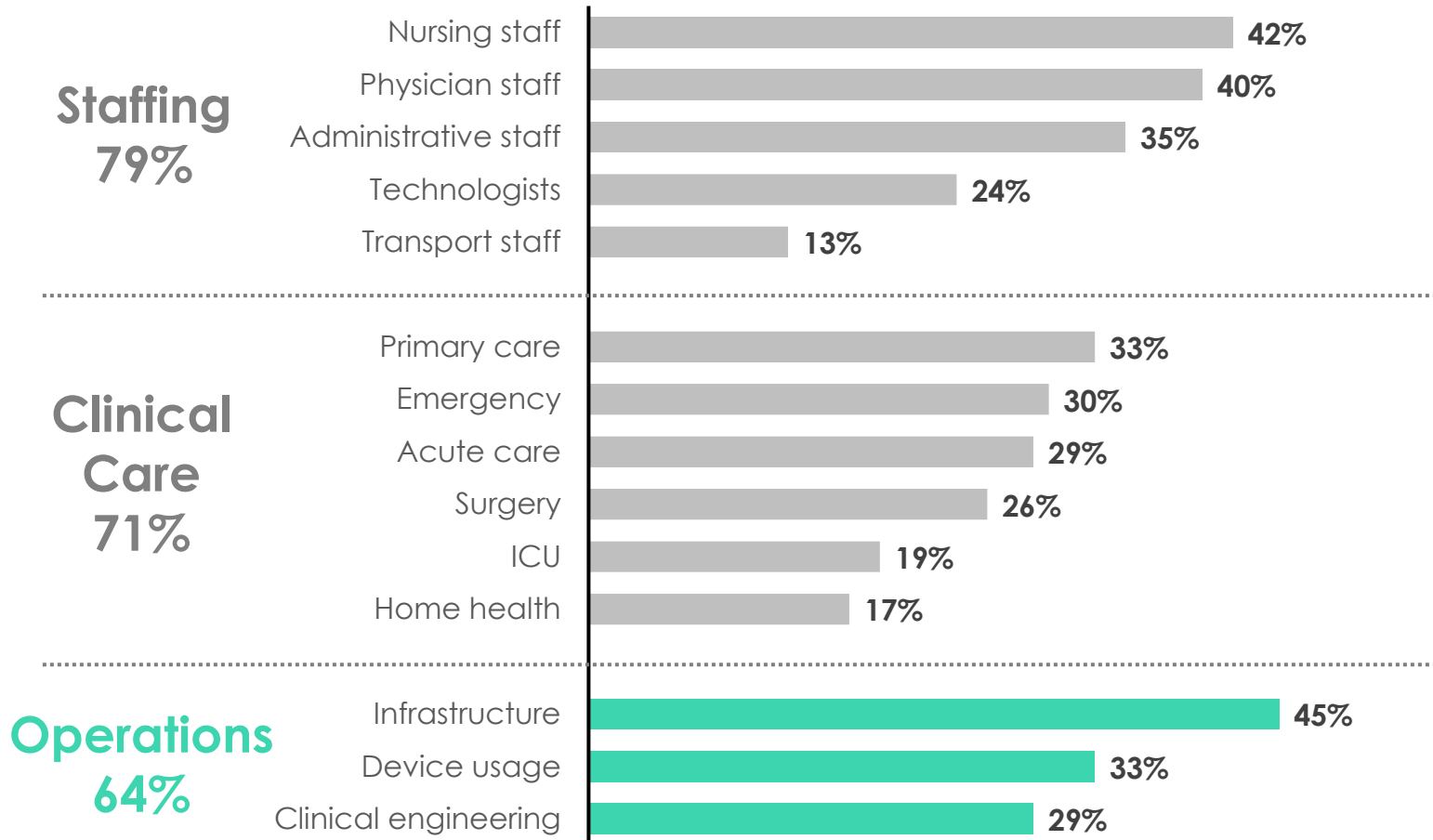
Technologists mentioned more often by those in organizations in **urban areas** or those with **2,500+ employees**:

37% of those in urban settings vs. 13% in suburban* and 8% in rural* areas

29% amongst those with 2,500+ employees vs. 11% of those with <2,500 employees

Larger organizations also say operational areas, including infrastructure, device usage, and clinical engineering, are some of the most important areas to apply automation standardization

Where is it most important to apply automation standardization to your operations and clinical environments?



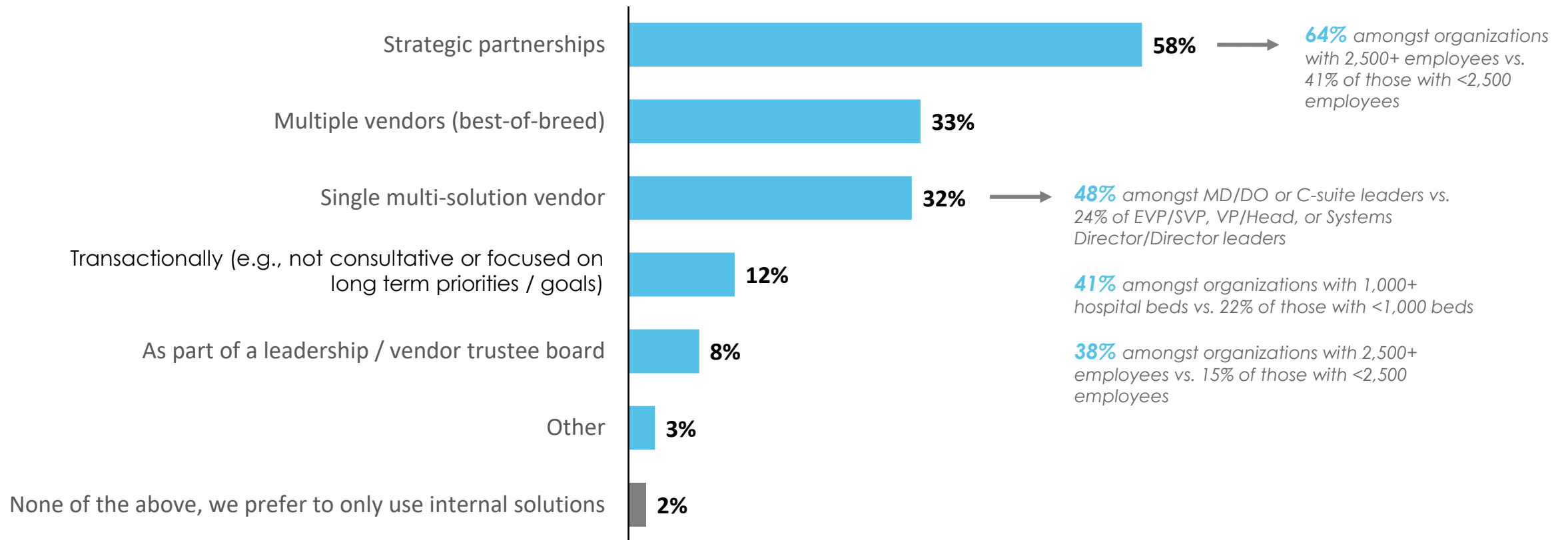
Operations mentioned more often by those in organizations with **more than 1,000 hospital beds** or with **revenues of \$1.1B+**:

74% amongst those with 1,000+ hospital beds vs. 52% of those with <1,000 beds

69% amongst those with revenues of \$1.1B+ vs. 47% with <\$1.1B in revenue

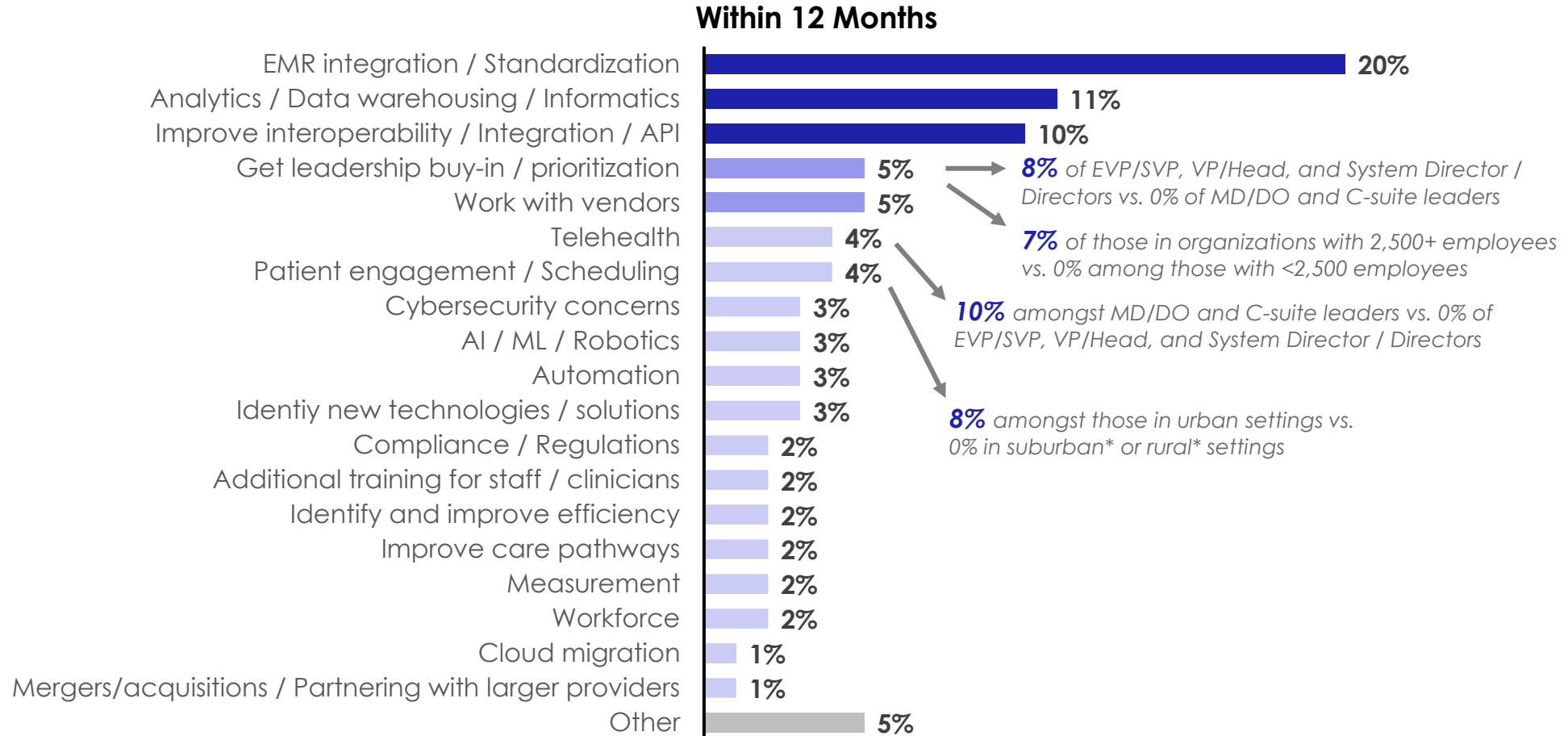
Most say their organizations prefer to have strategic partnerships with their solutions providers; around one-third say they prefer to work with multiple providers or single multi-solution vendors

How does your organization prefer to work with solution(s) providers to build and support a digital-first workforce?



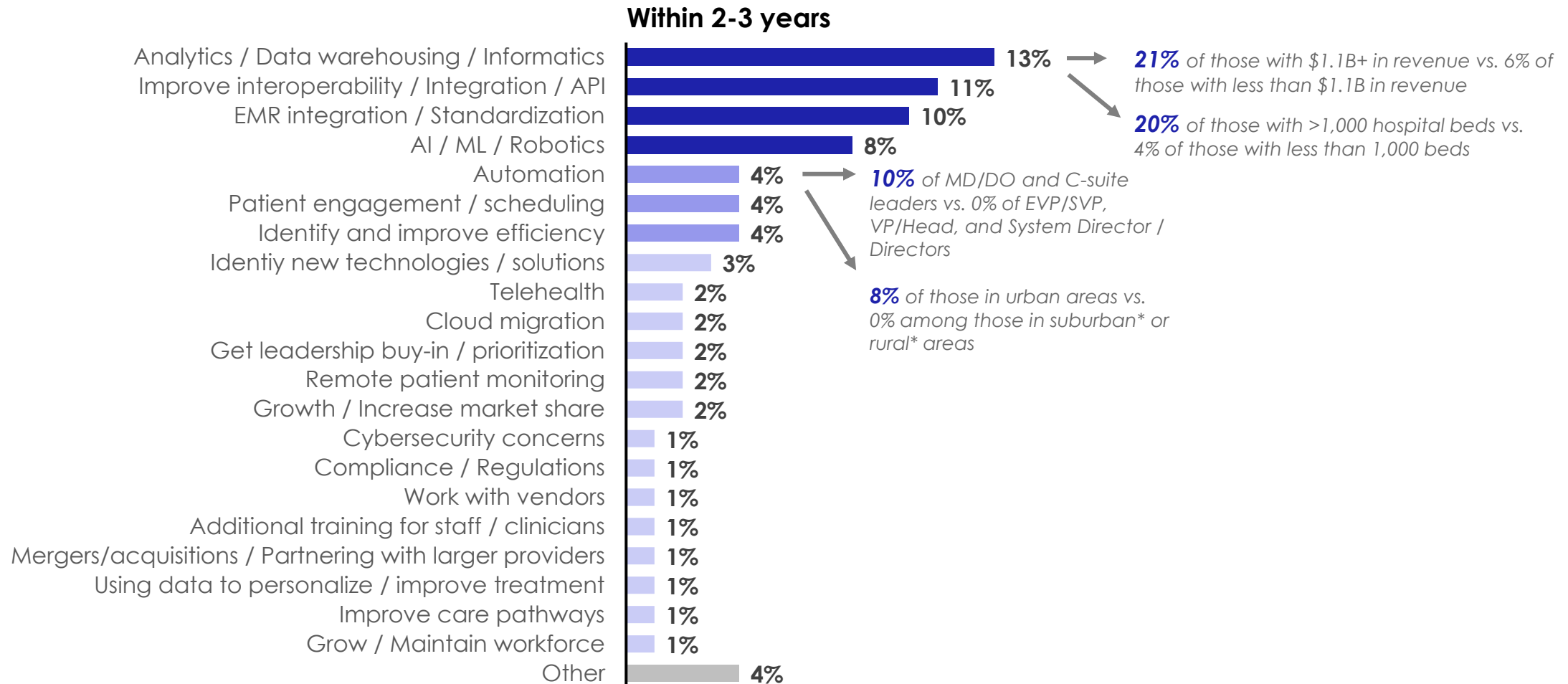
In the short term, organizations are most aspiring for EMR integration / standardization across their systems

What are your organization's short-term aspirations for solution selection in order to drive interoperability and operational informatics outcomes?



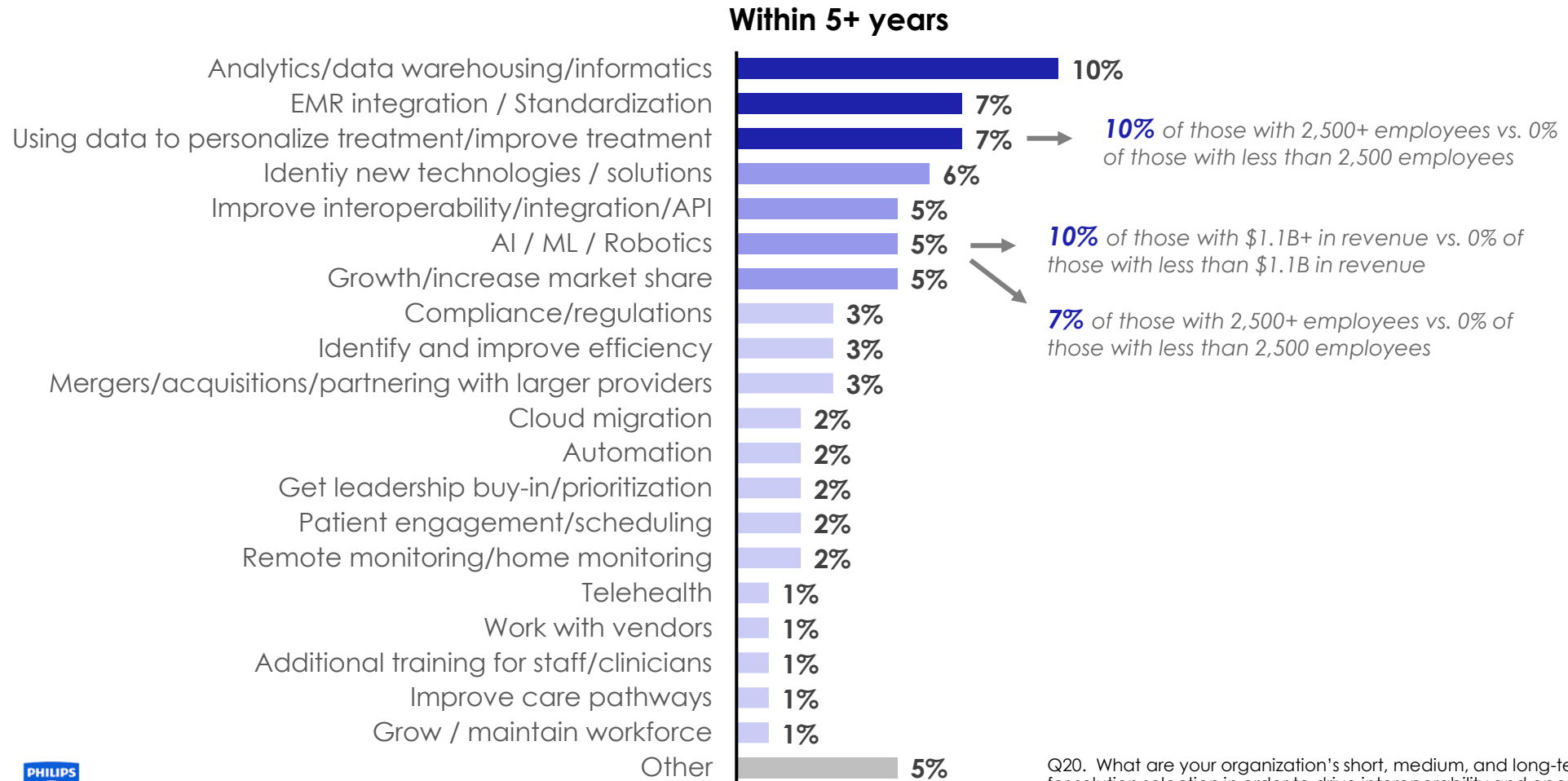
Medium term, organizations want to focus on analytics / data warehousing / informatics; this is particularly true among larger organizations

What are your organization's medium-term aspirations for solution selection in order to drive interoperability and operational informatics outcomes?



When thinking longer term, analytics / data warehousing / informatics are mentioned most often, followed by EMR integrations and using data to personalize & improve patient treatments

What are your organization's long-term aspirations for solution selection in order to drive interoperability and operational informatics outcomes?



Not displayed: 'None / N/A', 8%

Q20. What are your organization's short, medium, and long-term aspirations for solution selection in order to drive interoperability and operational informatics outcomes?
Base: Total Respondents; n=100; question shown as an open-end response

Key Takeaways

1

Healthcare organizations report having been heavily impacted by the economy and clinician burnout over the past 1-2 years

When asked to reflect on how things have changed over the past year, healthcare executives, IT / technology leaders, and clinicians are most likely to say that data security (51%) has gotten better, while their organizations' financial standing (53%) and the staff experience (42%) has gotten worse.

2

7-in-10 feel their organizations' leadership is well equipped to evolve their organization over the next 1-2 years

But when asked to describe, in their own words, what is keeping them up at night when they think about the future of their organizations, the key concerns among executives, IT / technology leaders, and clinicians are cybersecurity (34%), staff retention & burnout (30%), and increasing costs / maintaining profitability (23%).

3

Only 2-in-5 believe their organization is financially prepared for the next 12 months, and just one-third believe the same looking ahead for the next 1-3 years

Those working in single facility worksites (36% next 12 months | 18% next 1-3 years), organizations with less employees (33% next 12 months | 11% next 1-3 years), and those in urban (38% next 12 months | 33% next 1-3 years) or rural (29% next 12 months | 13% next 1-3 years) areas report lower financial preparedness compared to their counterparts. Across all respondents, the decrease in available labor (60%) is having the greatest impact on their perceptions of their organizations' financial preparedness.

4

Cybersecurity and improving the staff experience are top priorities for healthcare organizations over the next 1-2 years

Healthcare executives, IT / technology leaders, and clinicians feel their organizations are well equipped to address cybersecurity (62%) but are much less equipped to address the staff experience (20%). Key roadblocks to addressing these priorities include increased operating costs (65%), understaffing (64%), and lack of budget (52%).

5

Over 40% of respondents do not feel their organization is aligned on what is most important to address

The key source of this misalignment is around the goal of improving the staff experience to address understaffing and burnout (59%).

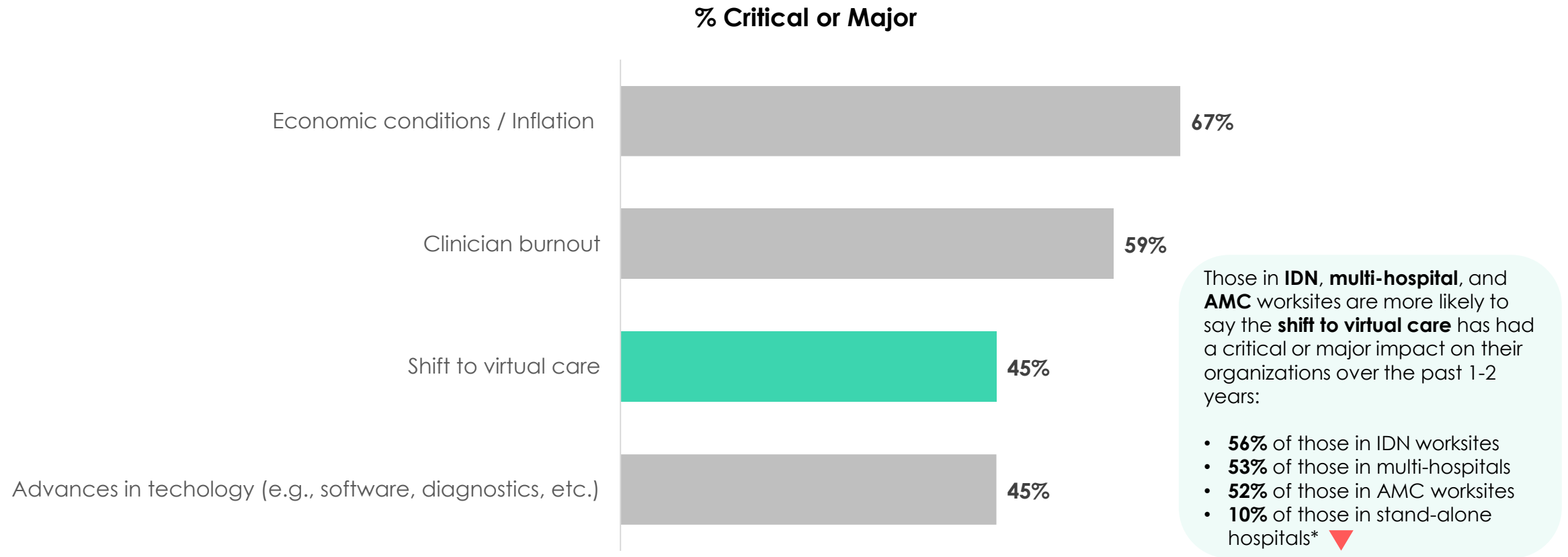
Appendix

Differences by Worksite



The shift to virtual care over the past 1-2 years has had less of an impact on stand-alone hospitals

How would you rate the impact that each of the following has had on your organization over the past 1-2 years?



▼ Significantly lower than other segment(s) at 95% confidence

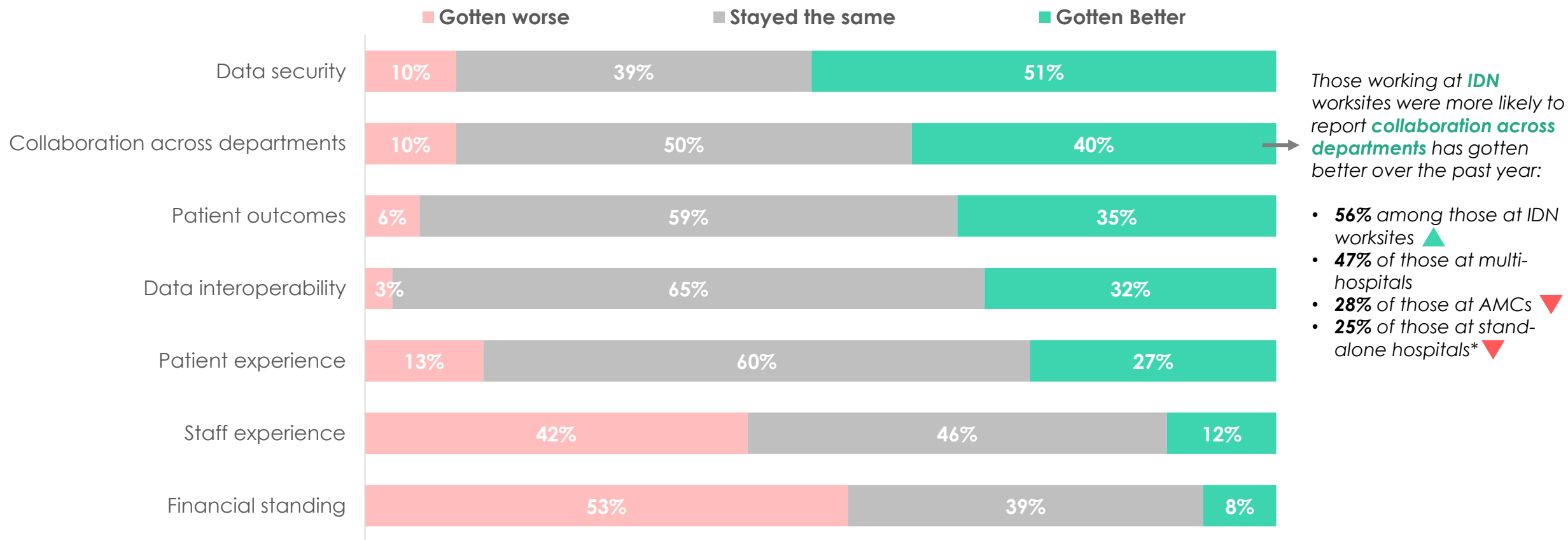


*Small base sizes, insight is directional

Q3. How would you rate the impact that each of the following has had on your organization over the past 1-2 years?
Base: Total Respondents; n = 100

Over half of those at IDN worksites reported that collaboration across departments has improved over the past year

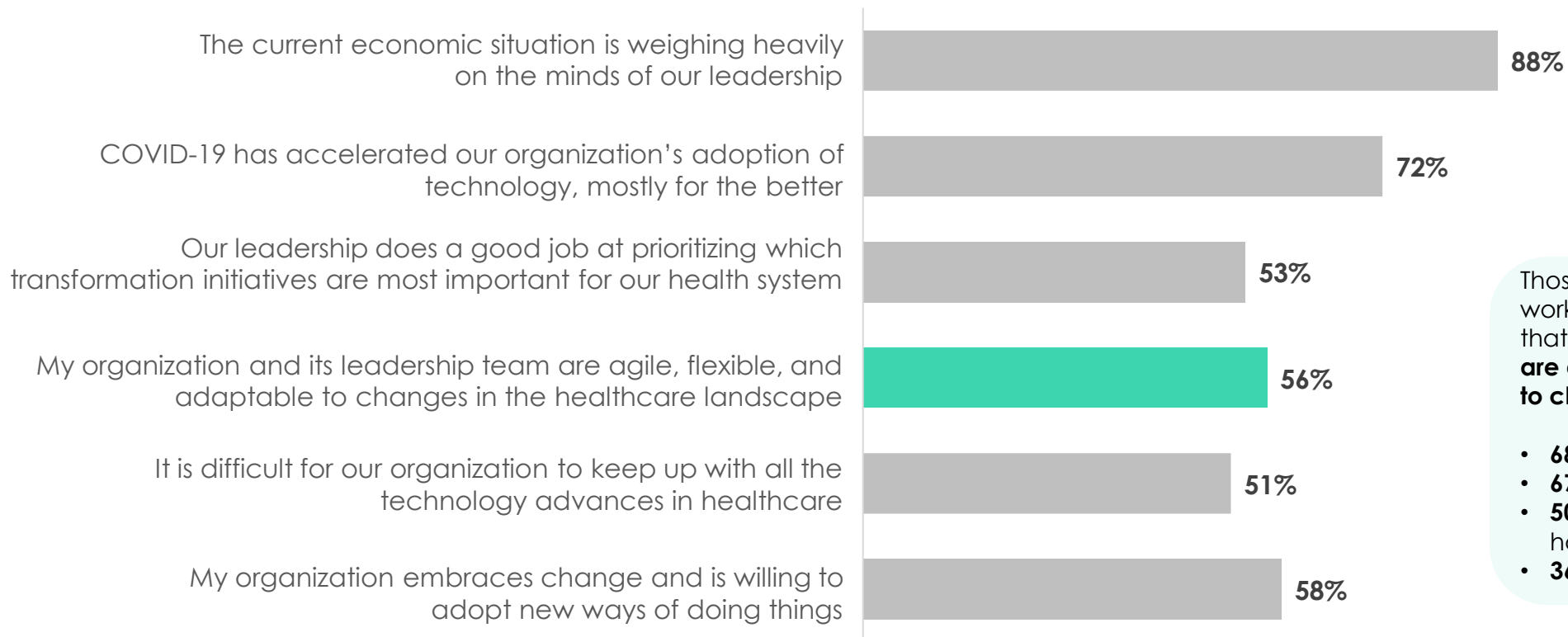
In thinking about your organization (not the industry as a whole), have each of the following gotten worse, stayed the same, or gotten better over the past year?



Those in IDN and multi-hospital worksites are more likely to agree that their organization and its leadership teams are agile, flexible, and adaptable to change

Please rate your level of agreement with each of the following statements.

T2B: % Strongly Agree + Somewhat Agree



Those in **IDN** and **multi-hospital** worksites are more likely to agree that their organizations' **leadership are agile, flexible, and adaptable to changes**:

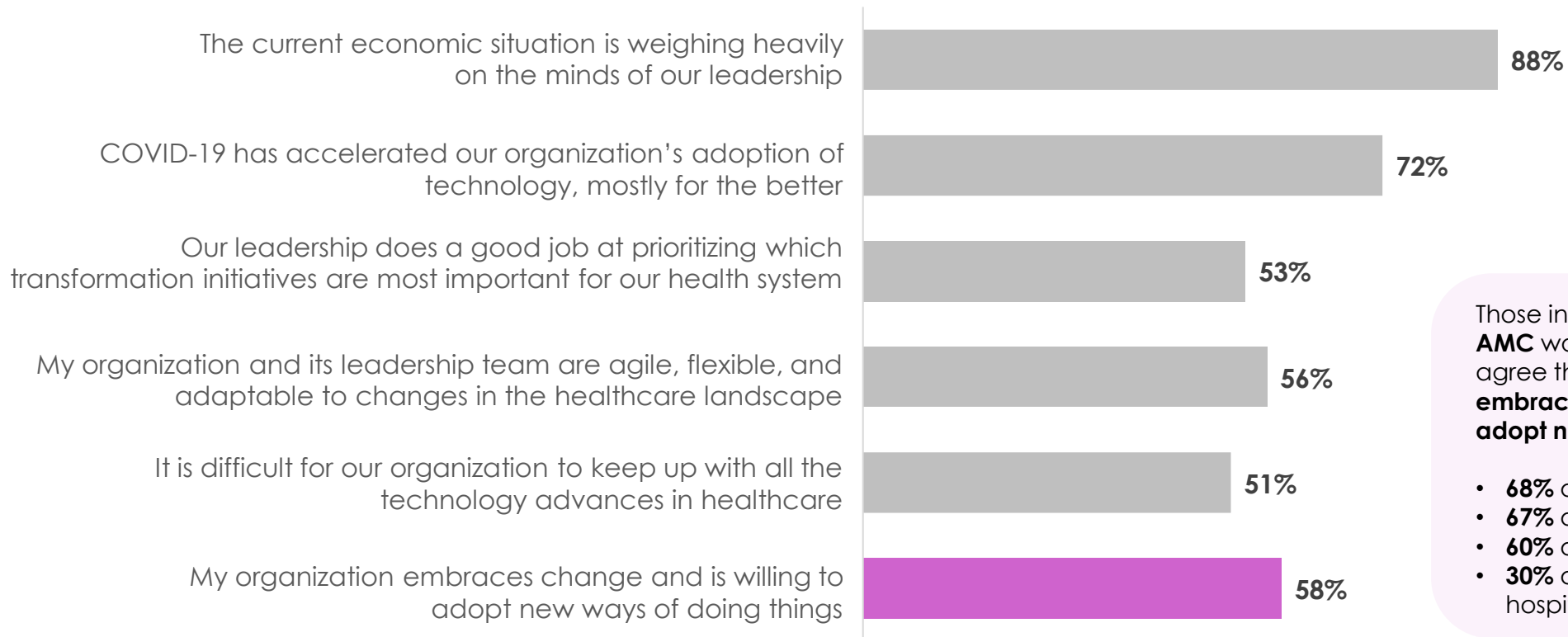
- **68%** of those in IDN worksites ▲
- **67%** of those in multi-hospitals ▲
- **50%** of those in stand-alone hospitals*
- **36%** of those in AMC worksites ▼

▲ Significantly higher or lower than other segment(s) at 95% confidence
▼

Those in stand-alone hospitals are less likely to agree that their organization embraces change and is willing to adapt to new ways of doing things compared to those in other worksites

Please rate your level of agreement with each of the following statements.

T2B: % Strongly Agree + Somewhat Agree



Those in **IDN**, **multi-hospital**, and **AMC** worksites are more likely to agree that their organization **embraces change and is willing to adopt new ways of doing things**:

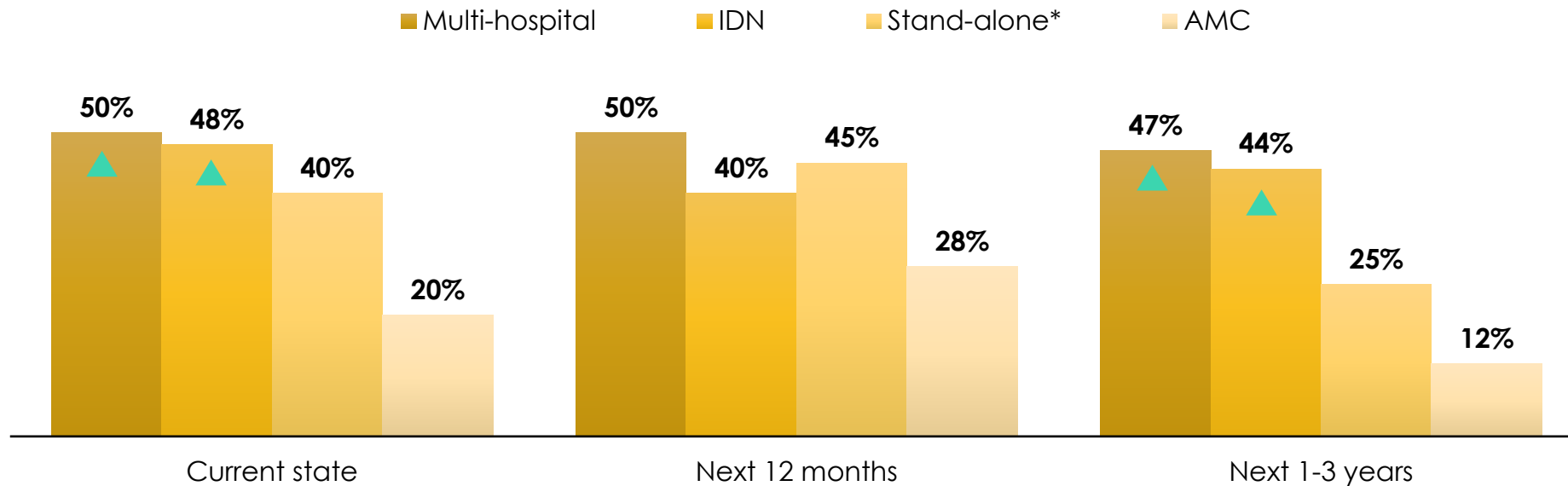
- **68%** of those in IDN worksites
- **67%** of those in multi-hospitals
- **60%** of those in AMC worksites
- **30%** of those in stand-alone hospitals* ▼

▼ Significantly lower than other segment(s) at 95% confidence

Those in multi-hospital and IDN worksites indicate a better state of financial preparedness for their organizations currently and in the next 1-3 years

How would you rate your organization's financial preparedness?

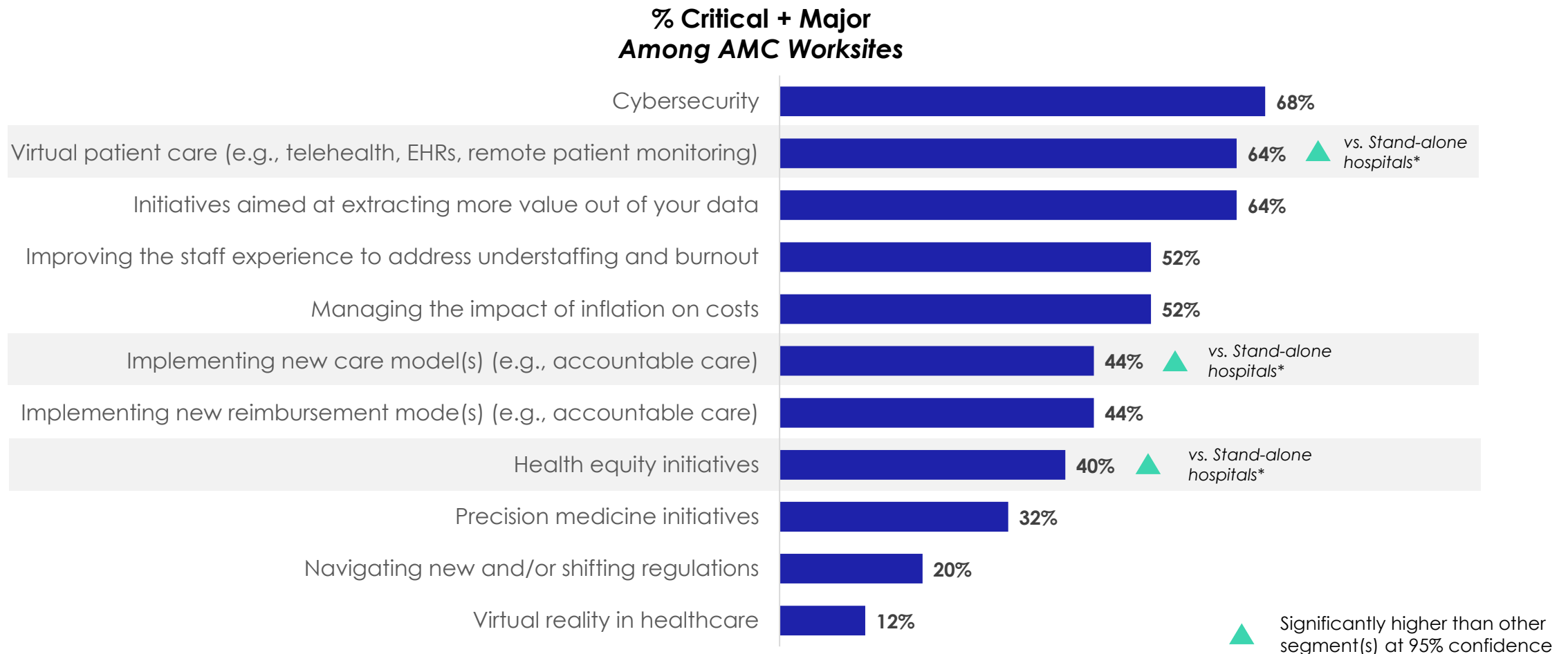
T2B: % Well prepared + Extremely prepared
By Worksite



▲ Significantly higher than other segment(s) at 95% confidence

For those working in AMCs, cybersecurity, virtual patient care, and initiatives aimed at extracting more value out of data are the top priorities over the next 1-2 years

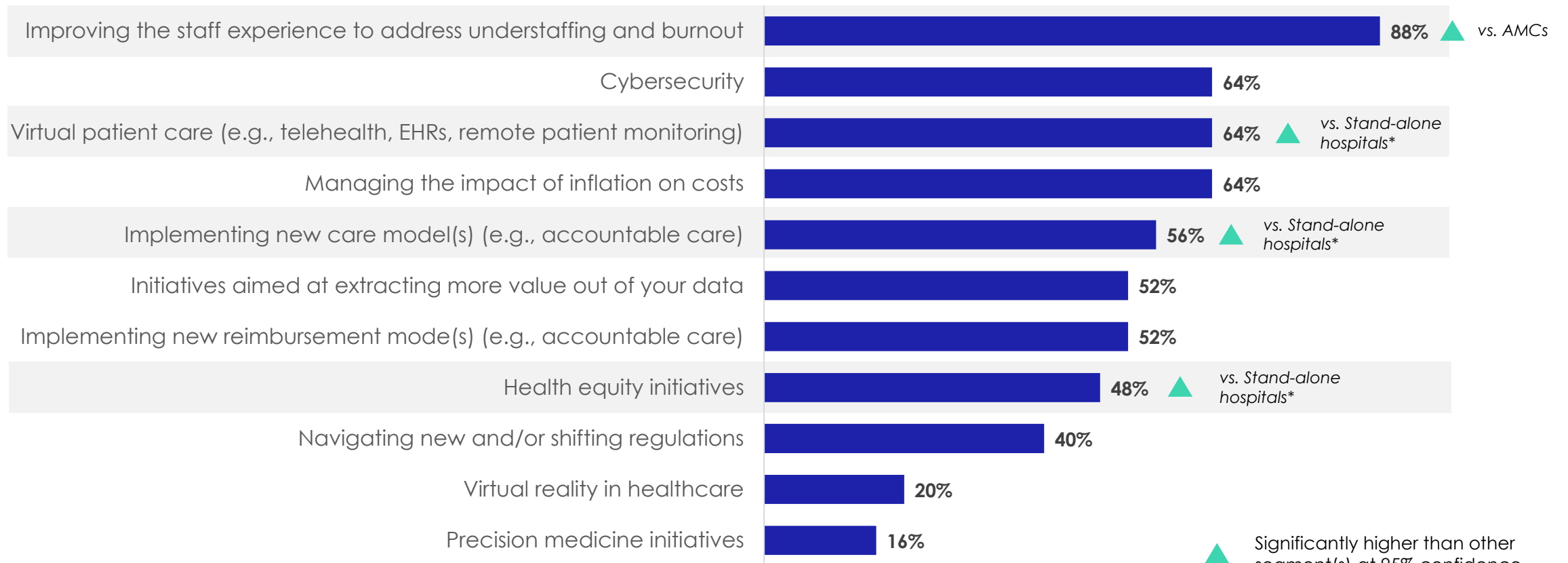
In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?



IDN organizations are most focused on improving the staff experience over the next 1-2 years

In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?

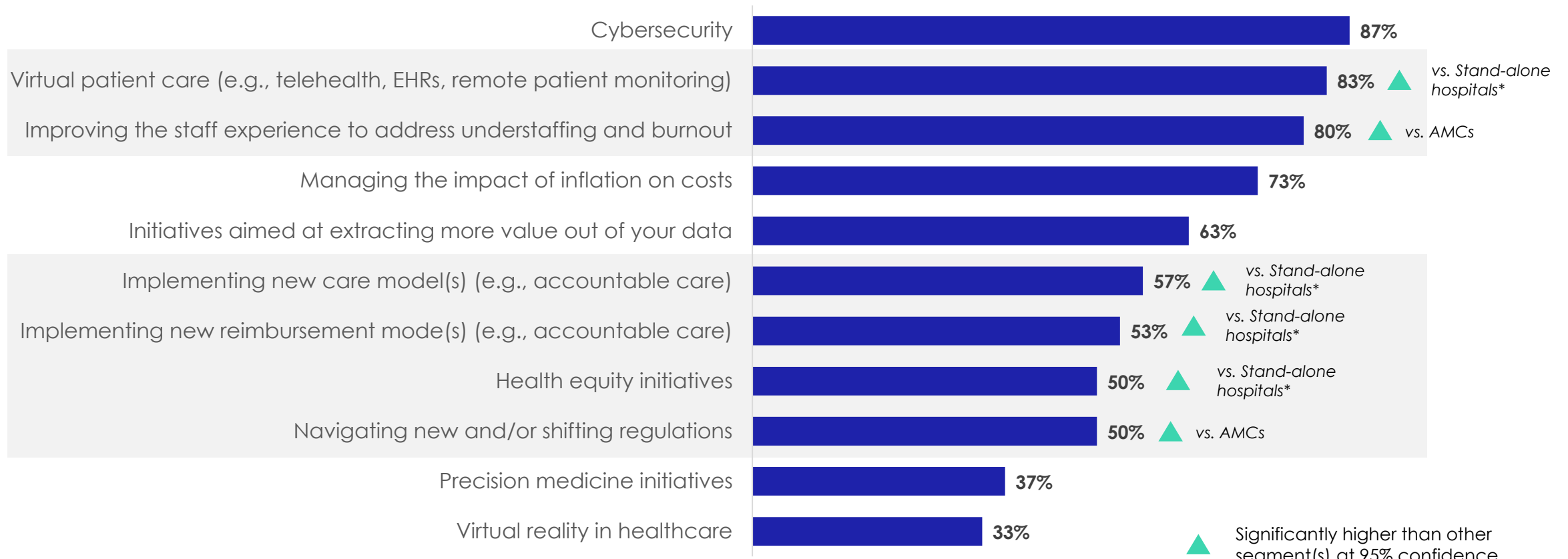
% Critical + Major Among IDN Worksites



While multi-hospitals say that cybersecurity, virtual patient care, and improving the staff experience are their top priorities

In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?

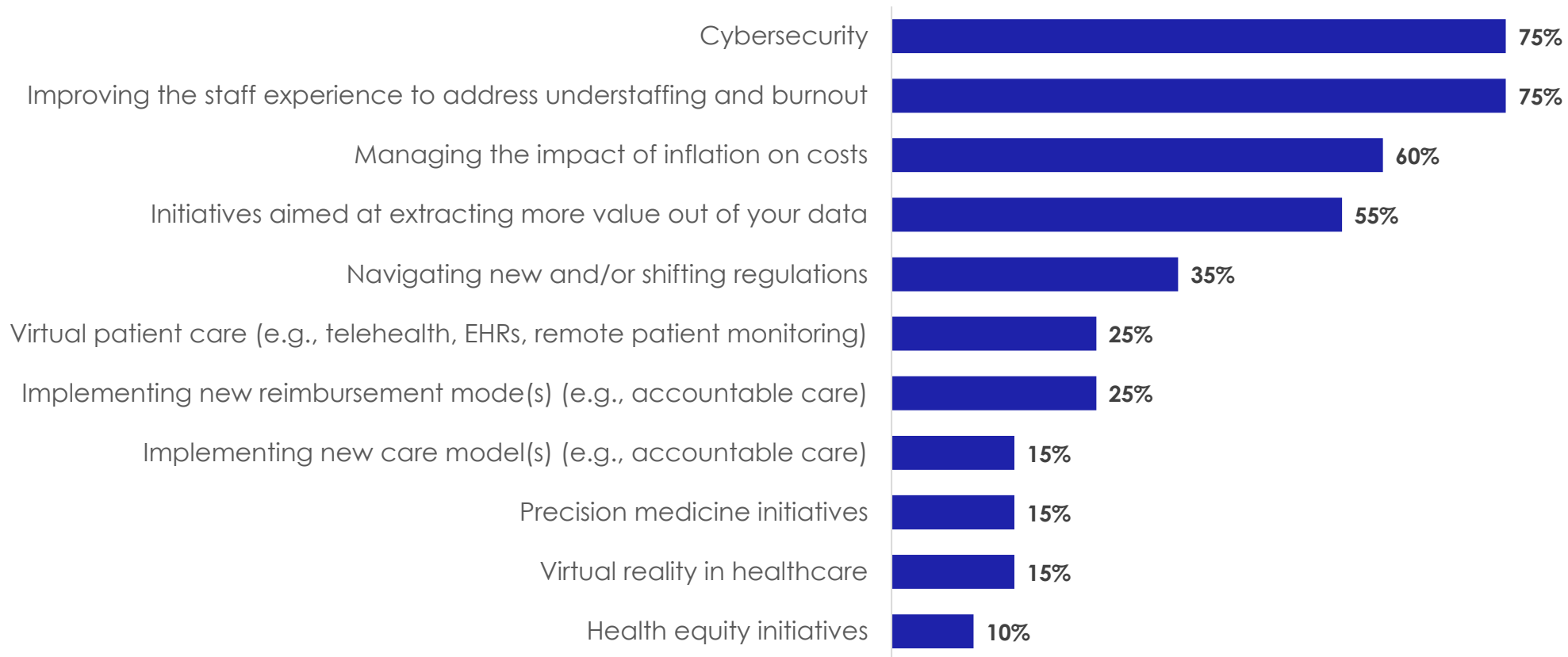
**% Critical + Major
Among Multi-Hospital Worksites**



Similarly, stand-alone hospitals say that cybersecurity and the staff experience are the top priorities for their leadership teams over the next couple years

In thinking about the priorities of your organization and its leadership team over the next 1-2 years, how would you rate the importance of each of the following areas?

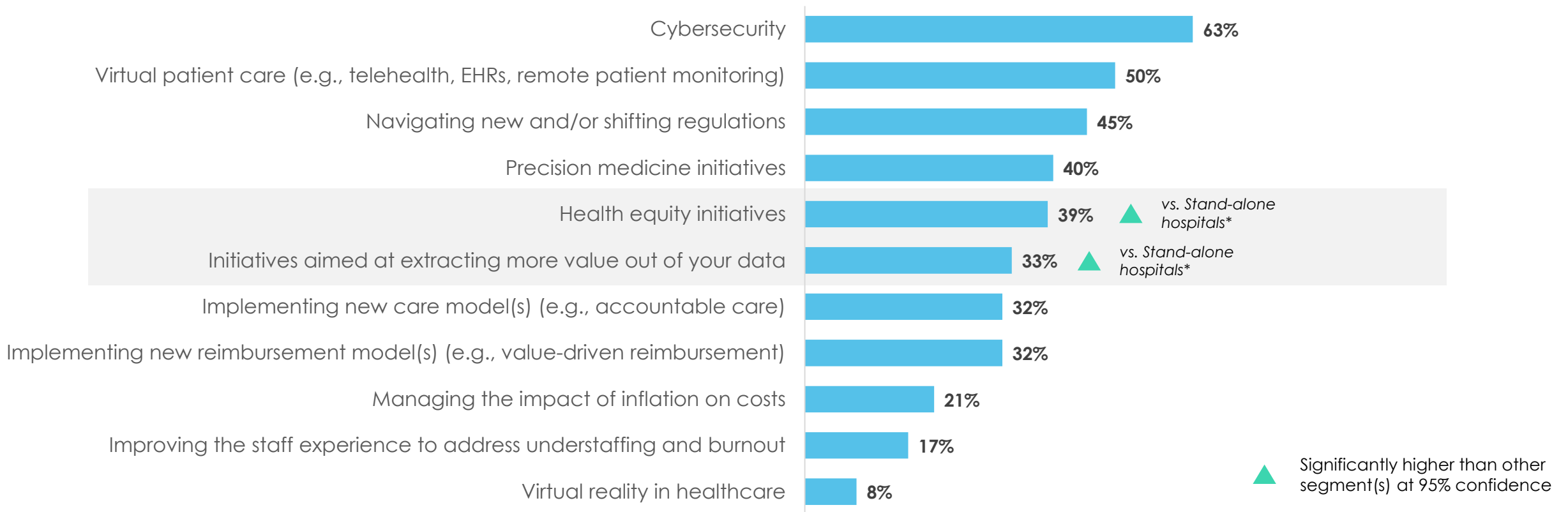
**% Critical + Major
Among Stand-alone Hospital Worksites***



Those in AMC worksites believe their organization is best equipped to address cybersecurity and virtual patient care over the next 1-2 years

Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

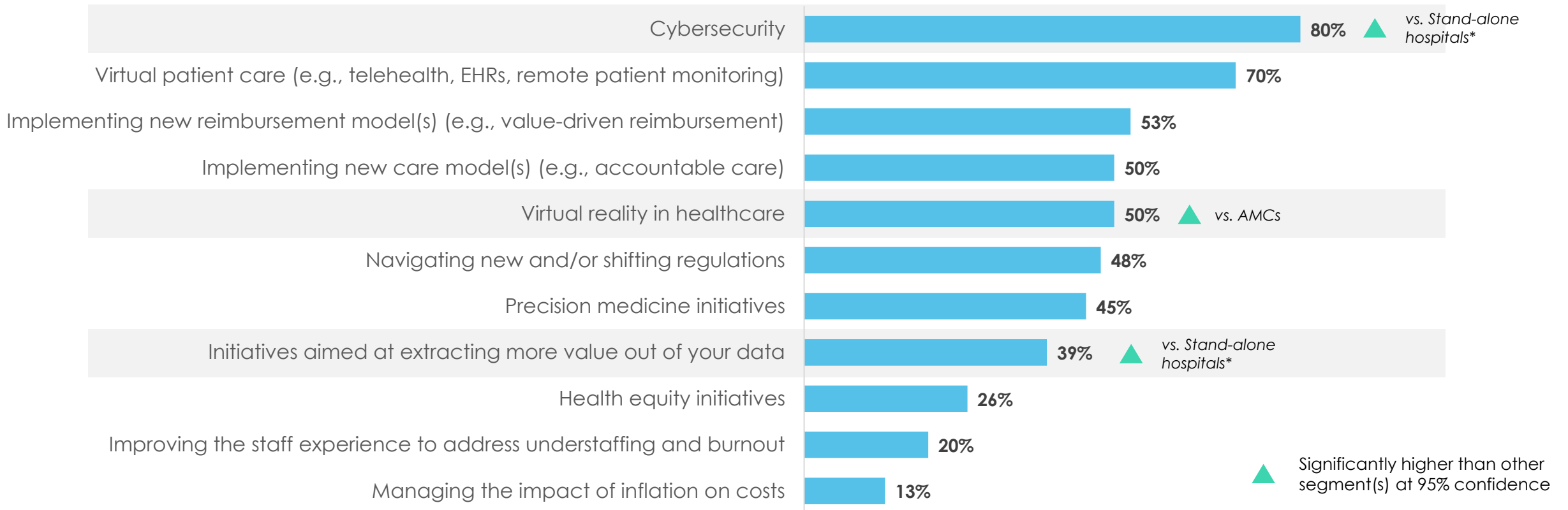
**T2B: % Very Well Equipped + Well Equipped
Among AMC Worksites**



Similarly, executives, IT / Technology leaders, and clinicians within IDN worksites believe their organization is best equipped to successfully address cybersecurity

Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

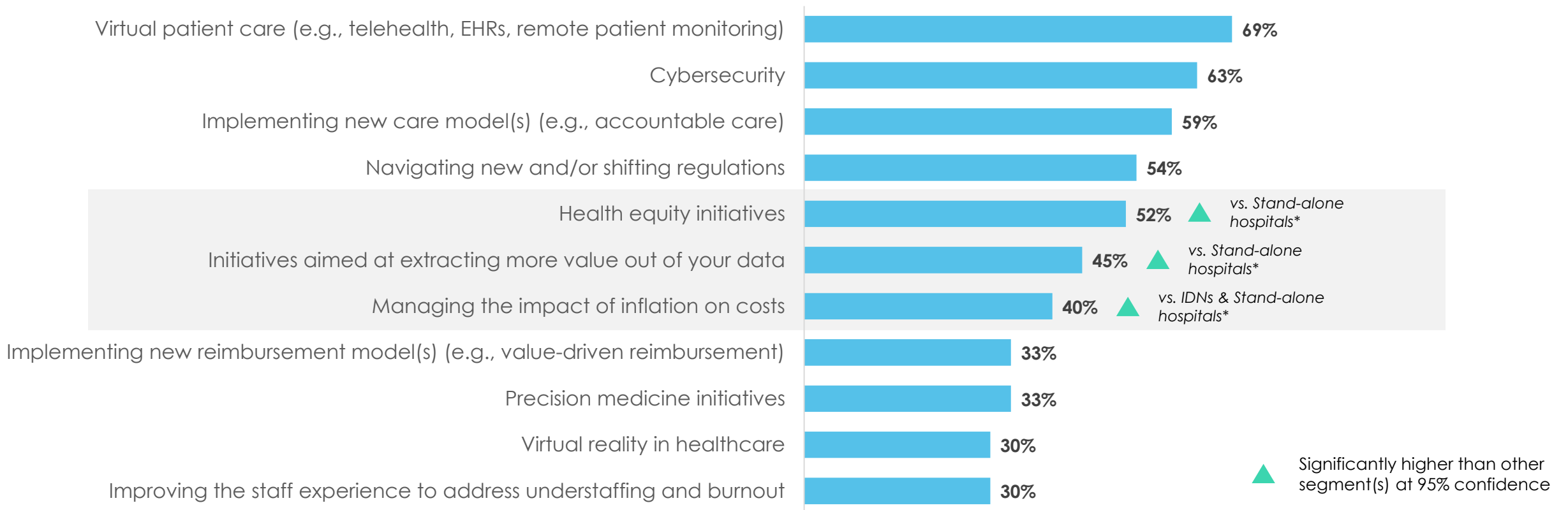
**T2B: % Very Well Equipped + Well Equipped
Among IDN Worksites**



Those in multi-hospital environments feel their organization and its leadership are best equipped to successfully address virtual patient care and cybersecurity

Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

**T2B: % Very Well Equipped + Well Equipped
Among Multi-Hospital Worksites**



Those in stand-alone hospitals also rate cybersecurity highest in terms of being well equipped to address them, although the overall top 2 box scores are significantly lower compared with those for other worksites

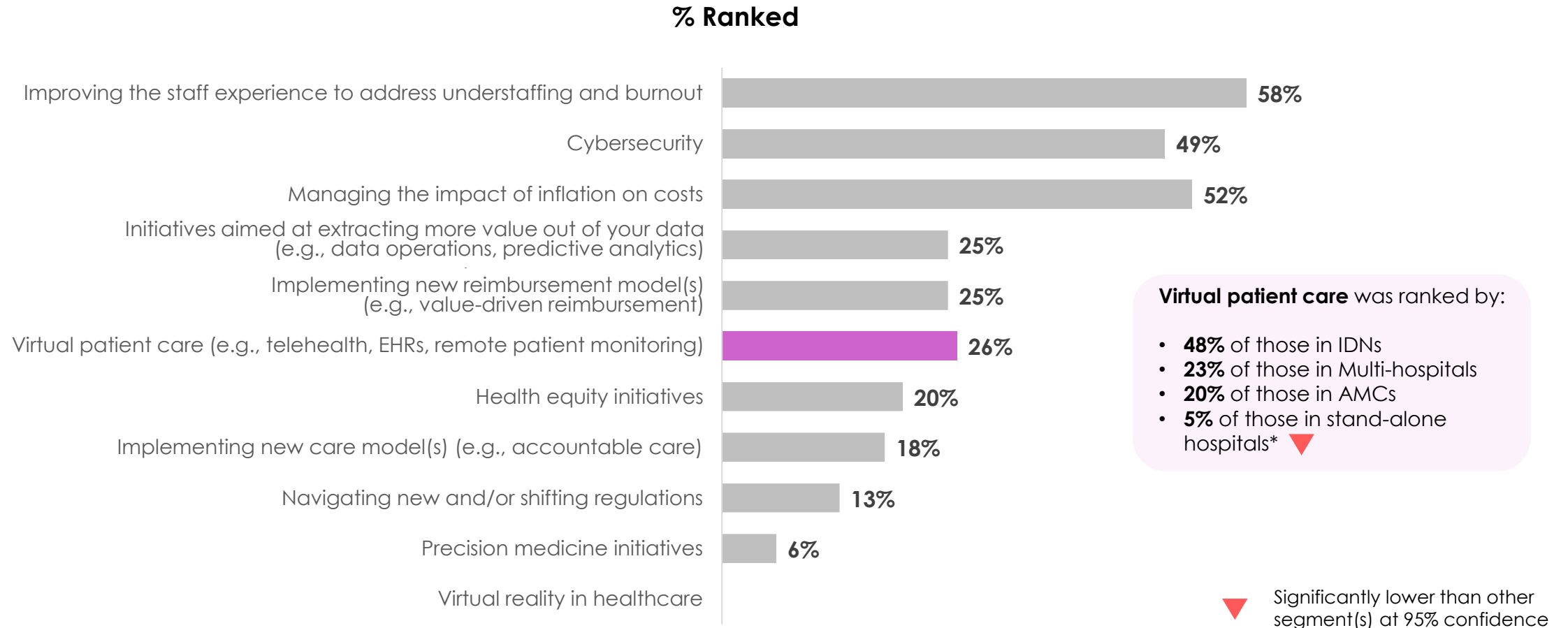
Thinking about the areas you identified as important over the next 1-2 years, how well equipped do you think your organization and its leadership are to successfully address them?

**T2B: % Very Well Equipped + Well Equipped
Among Stand-alone Hospital Worksites***



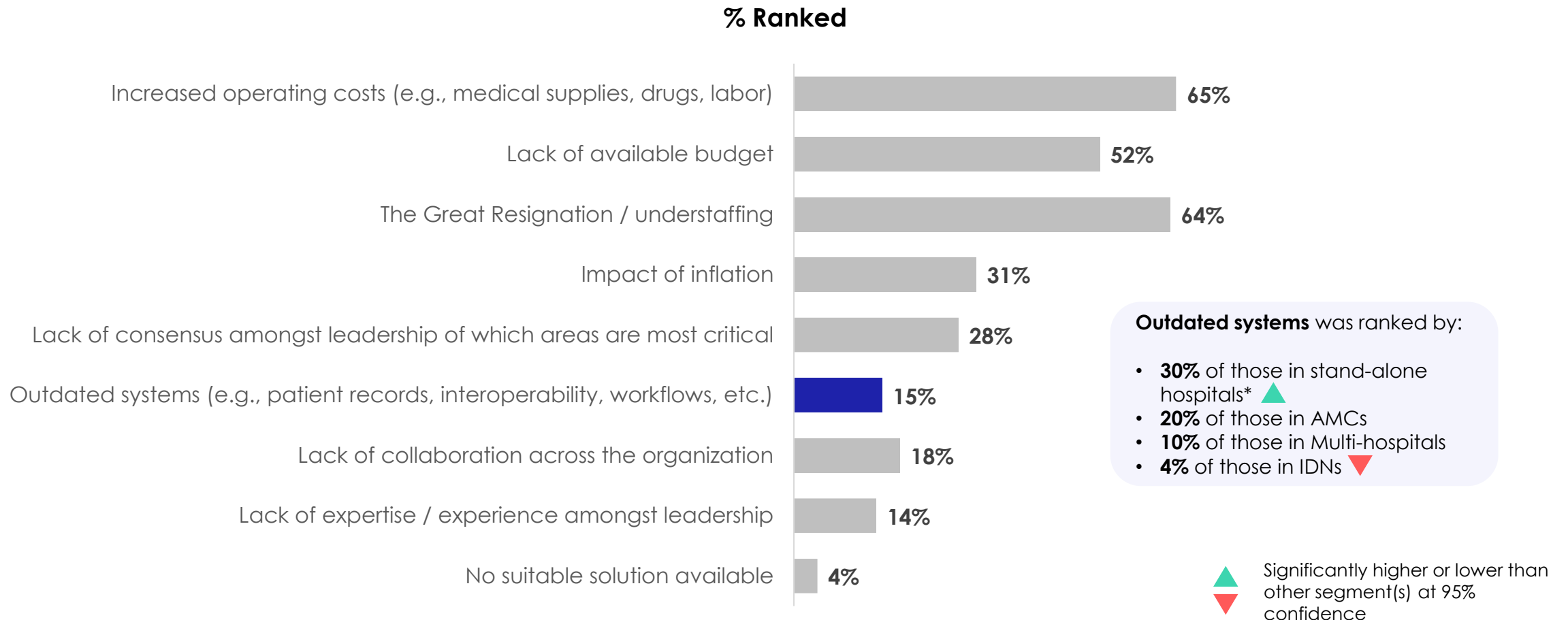
Virtual patient care is less important to those in stand-alone hospitals compared with other worksites

How would you rank these areas in terms of priority for your organization?



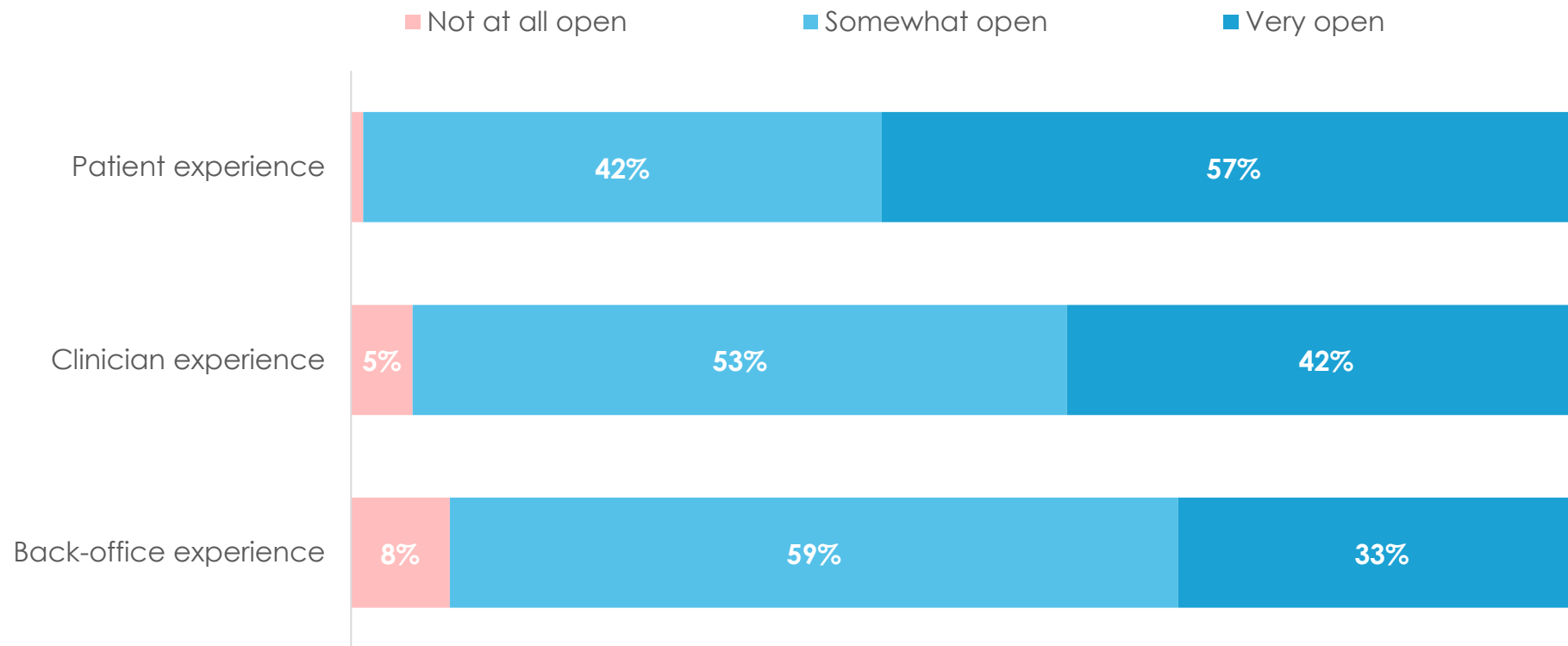
The impact of outdated systems is felt more strongly by those in stand-alone hospitals

What are the biggest challenges or roadblocks your organization is facing in addressing these key areas over the next 1-2 years (if any)?



Executives, IT / technology leaders, and clinicians in multi-hospital worksites are most likely to say their organization is 'very open' to adopting new technologies to improve the patient experience

How open would you say your organization is to adopting new technologies to improve the...



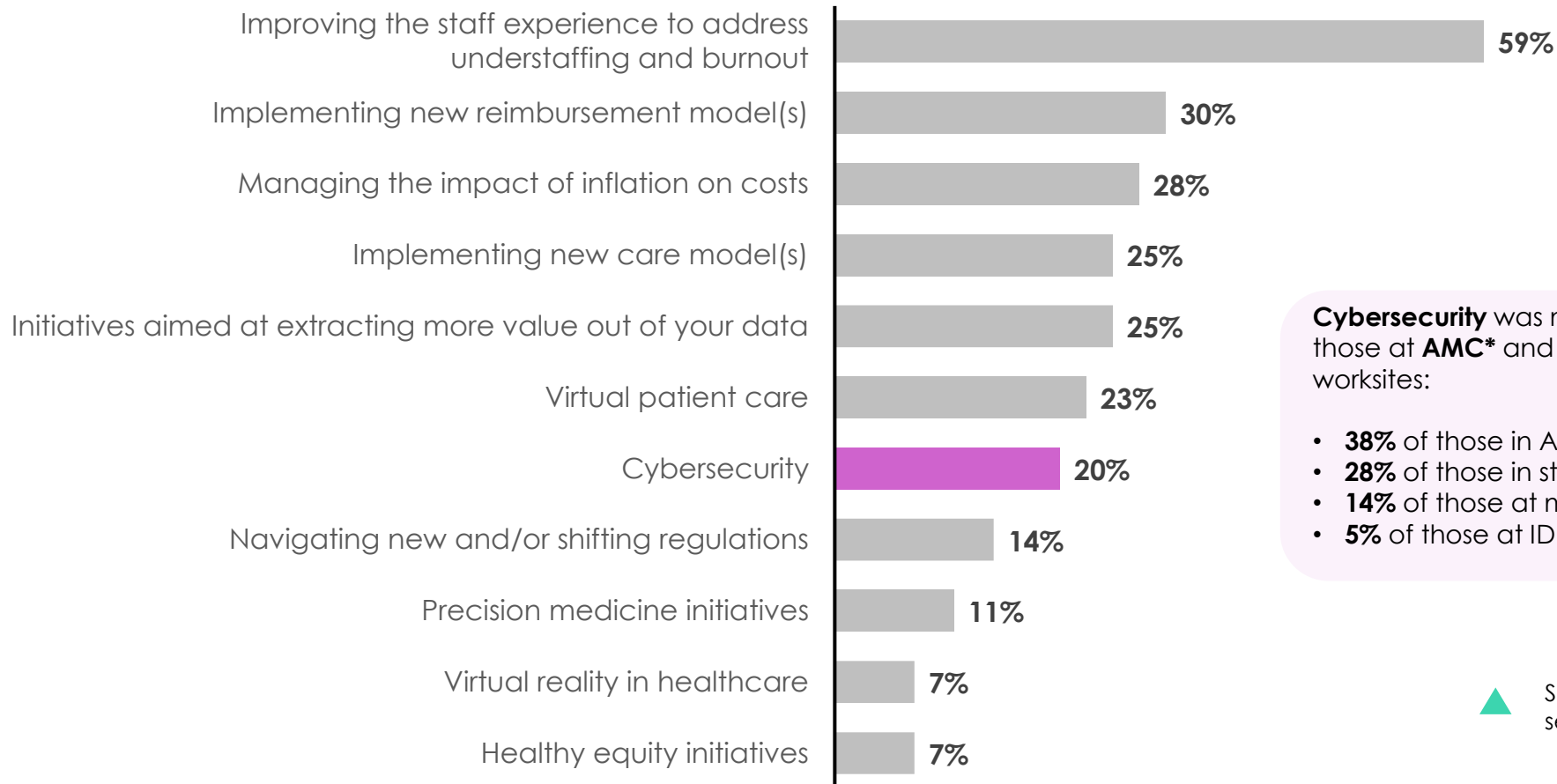
Those working at **multi-hospitals** were more likely to say their organization is 'very open' to adopting new technologies to improve the **patient experience**:

- **70%** of those at multi-hospitals ▲
- **68%** of those in IDN worksites
- **44%** of those at AMCs
- **40%** of those in stand-alone hospitals* ▼

▲ Significantly higher or lower than other segment(s) at 95% confidence
▼

Cybersecurity was mentioned more often as a source of misalignment in AMC and stand-alone hospital worksites

Which areas are sources of the most misalignment?



Cybersecurity was mentioned more often by those at **AMC*** and **stand-alone hospital*I** worksites:

- **38%** of those in AMCs* ▲
- **28%** of those in stand-alone hospitals* ▲
- **14%** of those at multi-hospitals*
- **5%** of those at IDNs*

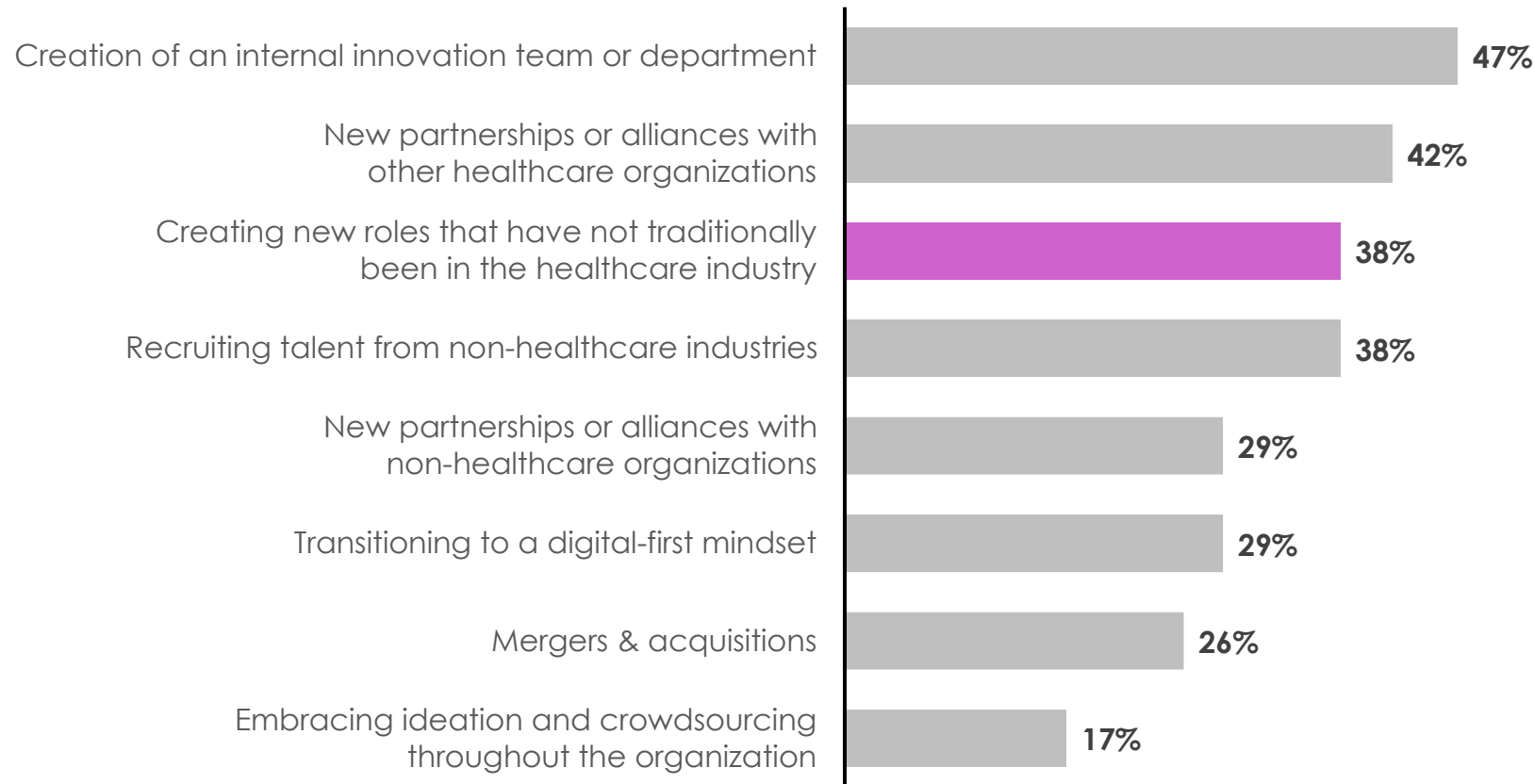
▲ Significantly higher than other segment(s) at 95% confidence

*Small base sizes, insight is directional

Q15. You said that your organization is strongly / somewhat / impartial in disagreement / somewhat in agreement. Which areas are sources of the most misalignment? Please select all that apply. Base: Total Respondents; n=83, those who did not select "strongly agree" in previous question

Executives, IT / technology leaders, and clinicians in IDN worksites more often mentioned their organization considering creating new roles that have not traditionally been in the healthcare industry

Which of the following strategies, if any, have been considered, are currently being considered, or are currently being considered, by your organization?



Mentioned significantly more often by those working in **IDNs**:

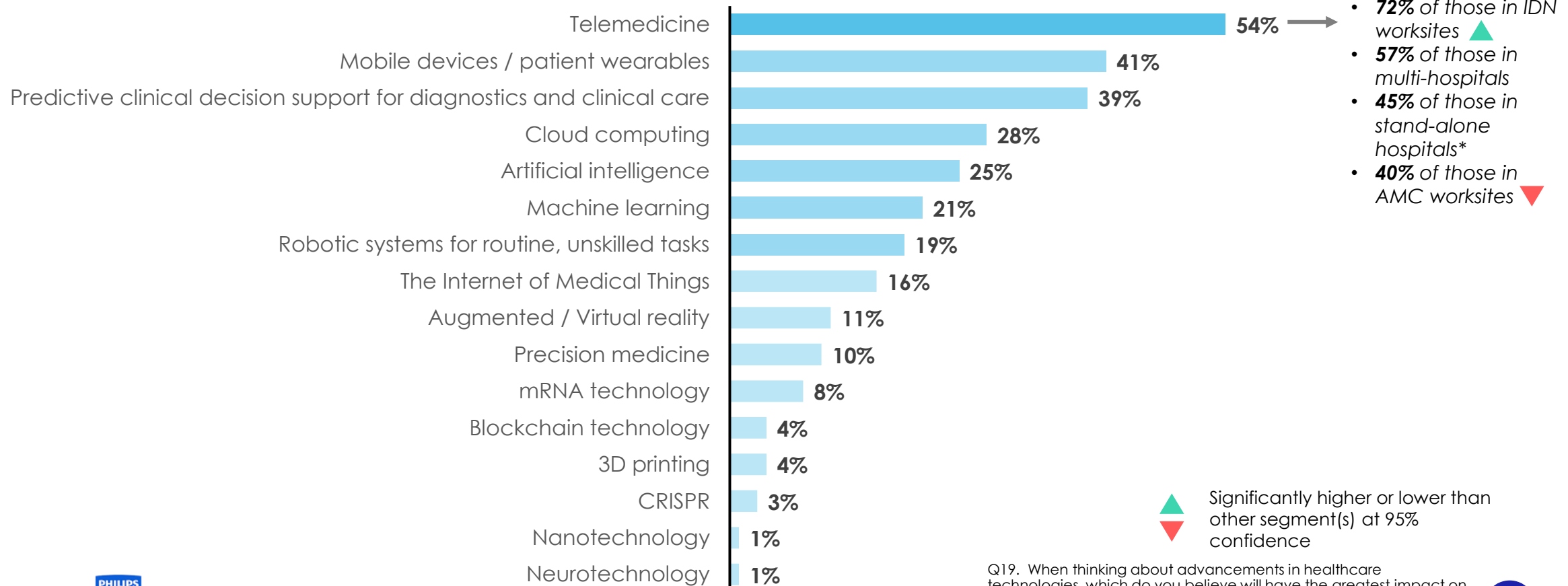
- **60%** of those in IDN worksites ▲
- **37%** of those in multi-hospitals
- **36%** of those at AMCs
- **15%** of those in stand-alone hospitals*

▲ Significantly higher than other segment(s) at 95% confidence

Those in IDN worksites are more likely to see telemedicine as the most impactful technological advancement for their organization over the next few years

When thinking about advancements in healthcare technologies, which do you believe will have the greatest impact on your organization over the next few years?

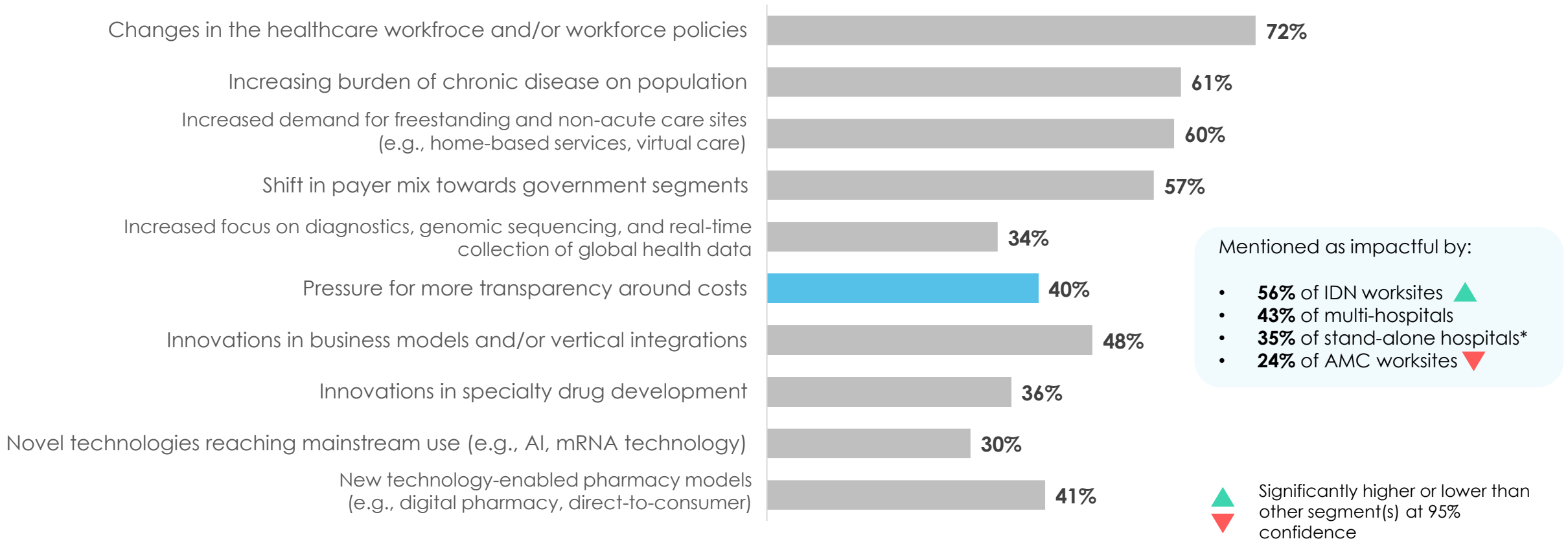
Next 1-3 Years



Those in IDN worksites were more likely to agree that the pressure for more transparency around costs will play a large role over the next decade

In looking to the future, which of the following do you think will have the greatest impact or play the largest role for your organization over the next decade?

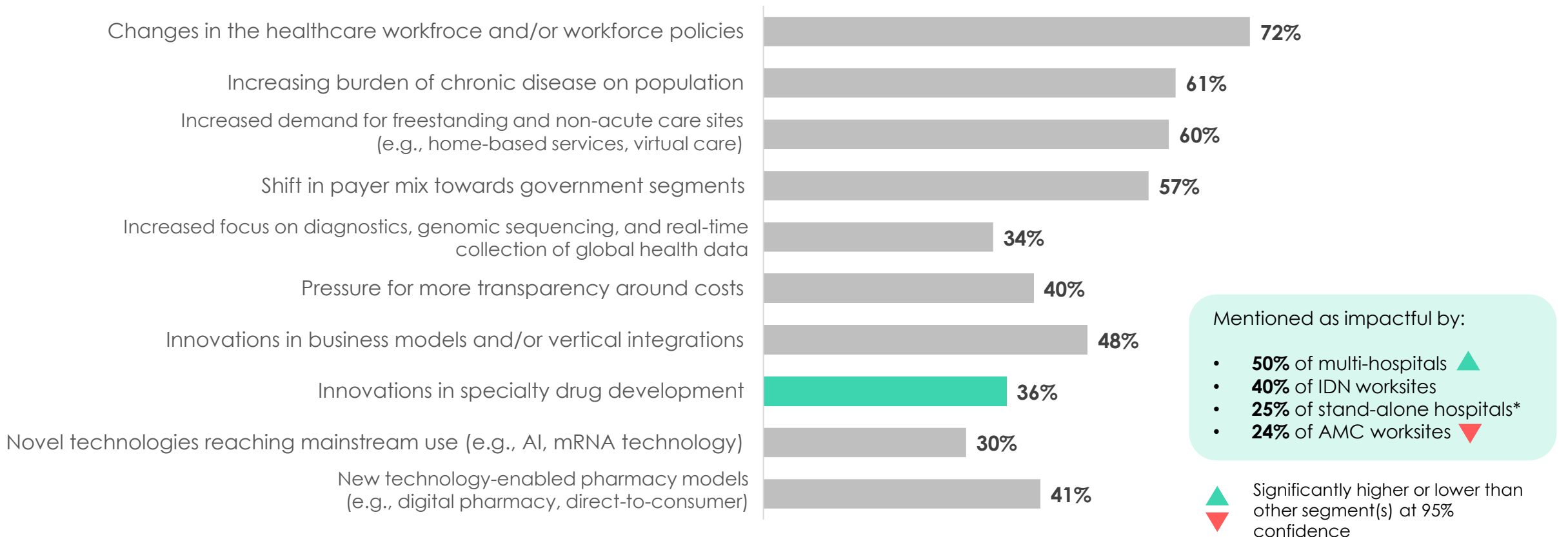
T2B: % Extremely + Very Impactful



While those in multi-hospital worksites were more likely to agree that innovations in specialty drug development will play a large role over the next decade

In looking to the future, which of the following do you think will have the greatest impact or play the largest role for your organization over the next decade?

T2B: % Extremely + Very Impactful



Thank You

For more information please contact:

Nicole Ramage

Market Insights Lead

Nicole.Ramage@himss.org



HIMSS

