



2023 HCO STRATEGIC OUTLOOK SURVEY

Strategic initiative outlook for healthcare provider organizations

Leaders at healthcare provider organizations (HCOs) are helping to shape the future of care delivery in the U.S. With more care shifting to outpatient settings and with an increasing focus on network utilization, Definitive Healthcare surveyed administration, strategy, marketing, operations, and finance leaders to understand their priorities and challenges. The results offer insights into how HCOs are improving network utilization and which service lines are growing the most.

OUR FINDINGS

Improving network utilizations is a top priority for HCOs

The top three strategic goals for HCOs in the upcoming years are related to improving network utilization:



Keeping patients within our organization by improving in-network referrals



Aligning facilities and services with patient demand



Analyzing local markets for service line expansion/opportunities

Demand for behavioral health options continues to grow

Here are the top service lines that HCOs have seen growth in the last two years and where they expect to see growth in the next two years:



51.8%

Behavioral health



36.9%

Cardiology



35.4%

Orthopedics



32.3%

Women's Health



29.7%

Oncology

Data gaps hinder optimal network utilization

Many leaders lack essential data for strategic decision-making. Fewer than half of respondents said they have the data and insights they need to support their strategic priorities.

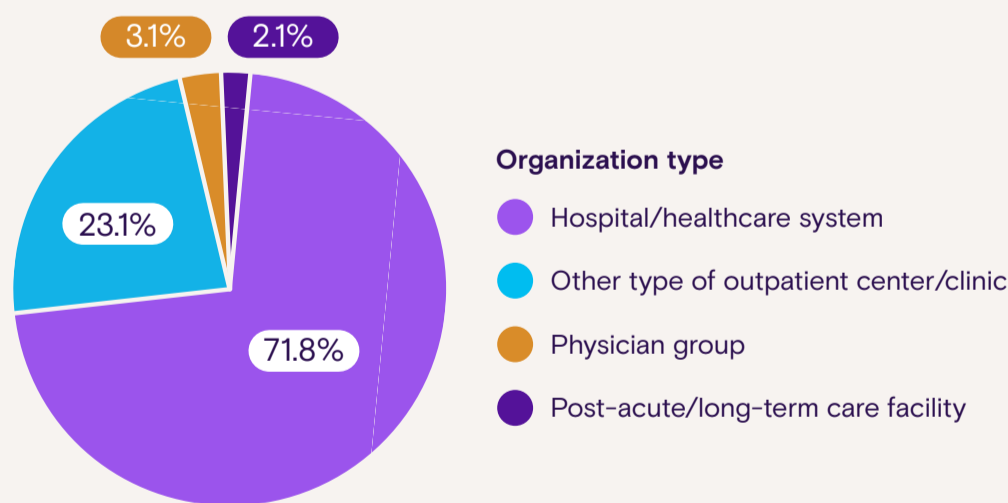
Statement	Disagree (1 or 2)	Neutral (3)	Agree (4 or 5)
Our organization can accurately calculate revenue impacts from patient leakage and out-of-network referrals	21.5%	39.0%	39.5%
We have the data needed to understand and reduce patient leakage	22.6%	34.9%	42.6%
Our teams have the data and insights we need to understand competitors and payor dynamics	21.0%	35.4%	43.6%
We have visibility into which referring physicians are loyalists, splitters, and dissenters to our organization	18.5%	35.9%	45.6%

How HCOs can address data gaps

HCOs could benefit from a data partner like Definitive Healthcare that will give them the insights they need to make more informed decisions about resource allocation, service line investments, physician outreach, and more.

OUR METHODOLOGY

We surveyed these healthcare leaders

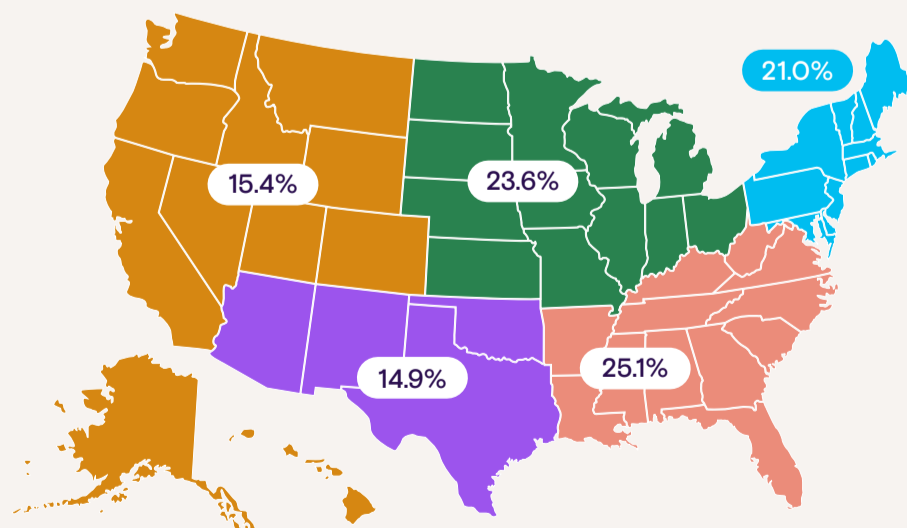


Top departments

Operations	31.3%
Clinical department/team	13.8%
Finance/revenue cycle	12.8%
Administration	7.2%
Strategy/strategic planning	5.1%
Care coordination	4.6%
Marketing	4.6%

Respondent by region

- Southeast
- Midwest
- Southwest
- Northeast
- West



About the respondents

195 Healthcare leaders

171 Healthcare provider organizations

What it all means

The survey results show the critical role data plays in helping healthcare leaders address their network utilization-related strategic priorities. In today's data-driven world, organizations that lack access to the right information to understand in-network referrals, align services with patient demand, and analyze local markets for service line expansion opportunities are at a competitive disadvantage. Learn how Definitive Healthcare can help your organization be well-positioned for success now and in the future.

Download the [full report](#) or contact us for a consultation today.

