

Survey Report:

How Clinical Labs Can Turn C-Suite Insights into Strategic Impact

Across the nation, clinical laboratory leaders have captured their executives' attention—unlocking their full strategic influence is next.

A survey of 155 healthcare executives* of U.S.-based organizations with on-site testing services indicates laboratory leaders have earned C-suite attention and interest in further investment.

Diagnostic and laboratory equipment is being prioritized above other medical technology for upgrades, second only to AI-enabled tools or decision support technologies. 95% of respondents say their organization has considered changes to their laboratory services in the past year—82% are focused on expansion.

When investments stall, healthcare executives say the leading reason is because the costs versus the benefits are still unclear. Sustaining financial performance is the top concern keeping these healthcare executives up at night.

Improving patient satisfaction, and aiding clinicians in reducing clinical errors and improving quality outcomes, follow as their dominant concerns. The survey reveals varying agreement about how laboratory operations can affect wider organizational goals.

More than half of healthcare executives now identify their lab as an important clinical enabler—an opportunity awaits laboratory leaders to convert the sizable minority that still view their lab as an operational necessity.

Have laboratory professionals' efforts to maintain reliable test results under growing systemic pressure masked the impact of staff shortages from the C-suite?

Workforce shortages also keep healthcare executives awake at night, but lab staff shortages may still be unrecognized or deprioritized compared to other clinical staff shortages. Healthcare executives may not fully understand the ripple effects of lab staff shortages that physicians and lab professionals recognize for patient care, quality of results, and wider organizational efficiency.

The opportunity is clear: Laboratory leaders can overcome investment barriers and position the lab as a strategic asset by reinforcing how efficiency in the lab contributes to wider organizational priorities top-of-mind for the C-suite. Improved operational performance, enhanced patient care or quality outcomes, and long-term cost efficiency is the framework within which labs can build their business case.

Click each topic to explore.

Top insights from the C-Suite

The "cost center" perception is fading

Are staff shortages shrinking—or underrecognized?

Medtech matters

The laboratory lever

Unclear cost-benefit analyses stall progress

Turning insights into strategic impact

*Qualified respondents needed to hold a senior leadership position (e.g., C-suite, department head, VP, or equivalent executive role) within a U.S.-based healthcare organization where laboratory testing is performed on-site or within their system or network.

Top insights from the C-Suite

Baseline views of the lab

(n=155)

Importance of testing

87% of healthcare executives surveyed *strongly agree* that **laboratory testing is a fundamental tool** in support of patient care

81% *strongly agree* test result turnaround times directly affect patient care

Lab staff support patient care



43% *strongly agree* lab staff shortages may affect their ability to care for patients

Actively considering investments

82% considered **expanding** laboratory services in the past 12 months;

▶ **65%** acted (n=148)

From cost center to value driver



55% now recognize the lab as an **important clinical enabler**; some say their lab is an underleveraged asset

Aging infrastructure

54% are prioritizing diagnostic and lab equipment for upgrades

30% *strongly agree* aging lab equipment poses a risk to their institution and its mission

Considering outsourcing



34% considered **outsourcing** laboratory services;

▶ **13%** acted (n=148)

Perception gaps

The lab as a strategic asset

38% view their lab as primarily operational with limited strategic focus

Impact of lab staff shortages

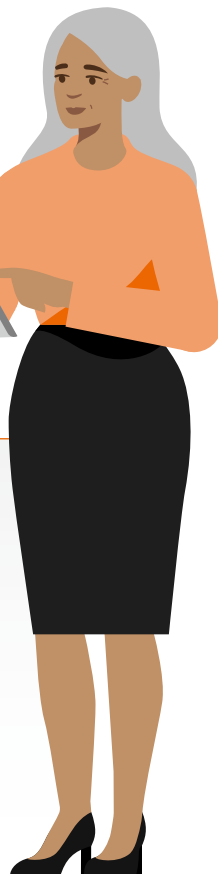


65% say lab staff shortages have affected their organization

▶ **34%** say lab staff shortages are not prioritized comparably to other clinical staff shortages (n=100)

How lab optimization benefits the wider organization

31% say they hesitated to act on lab investments they were evaluating because the benefits, weighed against the cost, remain unclear (n=32)



Top 5 challenges keeping executives awake at night

75%

Sustaining financial performance and margins

59%

Improving patient satisfaction

55%

Reducing clinical errors and improving quality outcomes

54%

Workforce shortages

39%

Data or cybersecurity

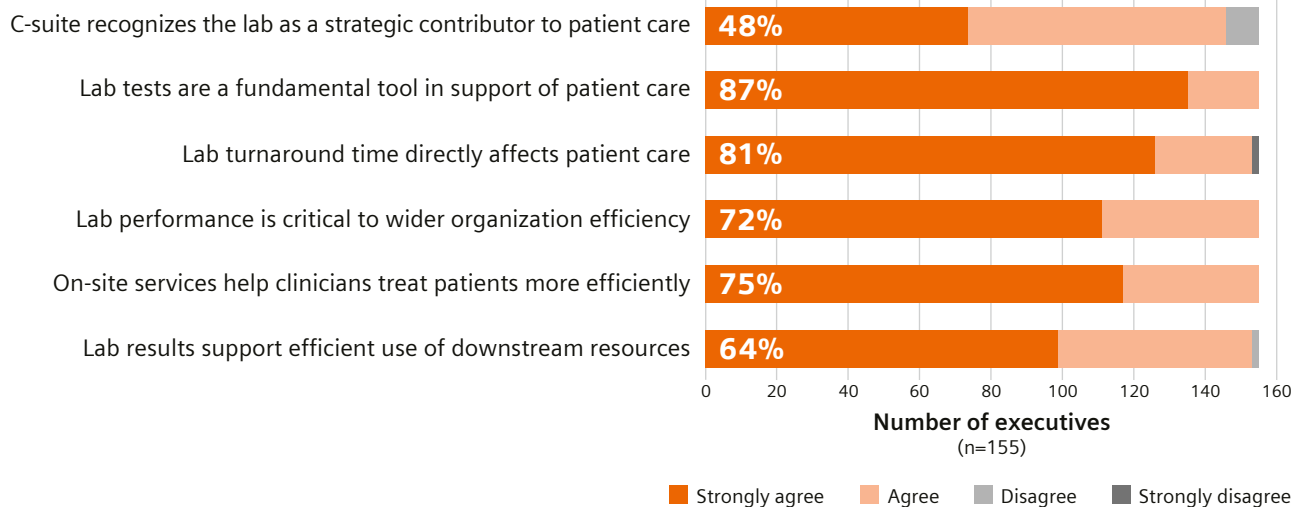


The “cost center” perception is fading

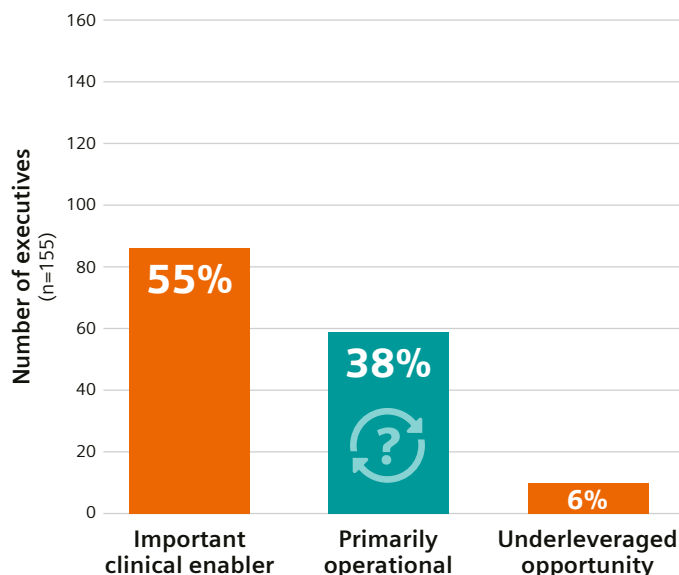


Insight ▶ There is strong agreement among healthcare executives about what value the lab offers their wider organizations. The laboratory is now viewed by many executives as an important clinical enabler rather than a behind-the-scenes cost center. Still, there’s work to be done to convince the remaining healthcare executives who view the lab as primarily an operational necessity.

How healthcare executives respond about the value of the lab



How healthcare executives characterize their lab’s role



92%

of healthcare executives agree that their laboratory's financial performance is closely evaluated.

Are staff shortages shrinking—or underrecognized?



Insight ▶ Workforce shortages are among the top five challenges keeping healthcare executives awake at night. However, they may be unaware that workforce shortages include laboratory staff—leading them to overlook or underestimate the constraints this can cause on the wider health system.

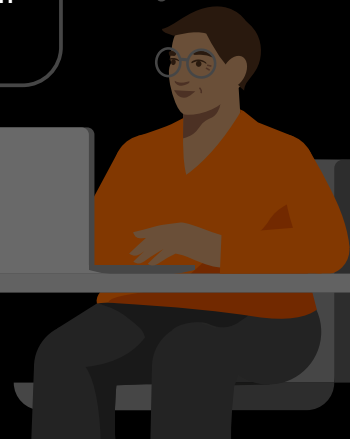
Among executives who specifically say workforce shortages keep them up at night (54%, n=84),

1 in 4

say lab staff shortages are not affecting their organization, suggesting other clinical staff shortages are the greater concern.

Workforce shortages keep me up at night, but ... lab staff shortages are not necessarily part of that burden

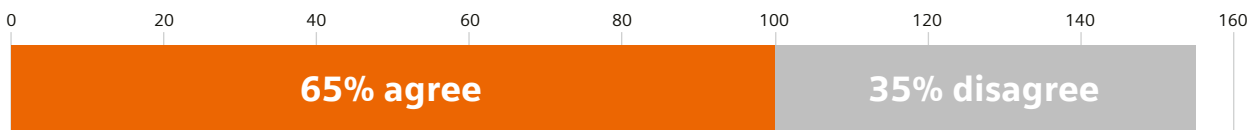
(25%, n=84)



Overall, the healthcare executives surveyed indicate widespread awareness of lab staff shortages, though one-third admit these shortages are not prioritized comparably to other clinical staff shortages. Underestimating the potential effects of an understaffed lab may lead the C-suite to underfund a diagnostically critical department.

Laboratory staff shortages have affected my institution

(n=155)



34% say lab staff shortages are not prioritized comparably to other clinical staff shortages.

(n=100)

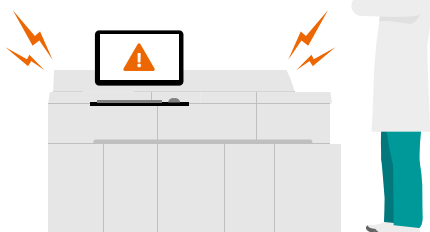
Medtech matters



Insight ► Healthcare executives acknowledge medical technology can present both opportunities and risks. Diagnostic and laboratory equipment is being prioritized among medical technology under consideration for upgrades, second only to AI-enabled tools or decision support technologies.

84%

of healthcare executives surveyed agree that aging lab equipment **poses a risk** to their institution and its mission



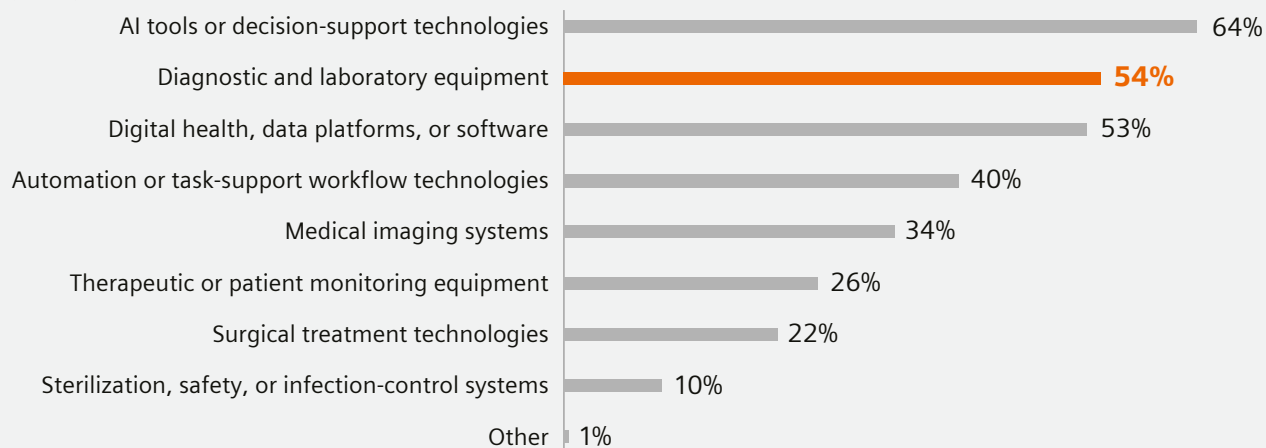
93%

agree investing in new technology **helps their organization** attract and retain talent



Which medtech healthcare executives say is being prioritized for upgrades

(n=155)



The laboratory lever



Insight ► More healthcare executives than not believe that investing in the laboratory would help achieve wider organization goals. However, the starkest disagreement within the survey was whether organizations are adopting technology that can optimize lab workflows and reduce dependency on scarce labor.

Financial investment

Healthcare executives indicate they are primarily interested in adding value.

95%

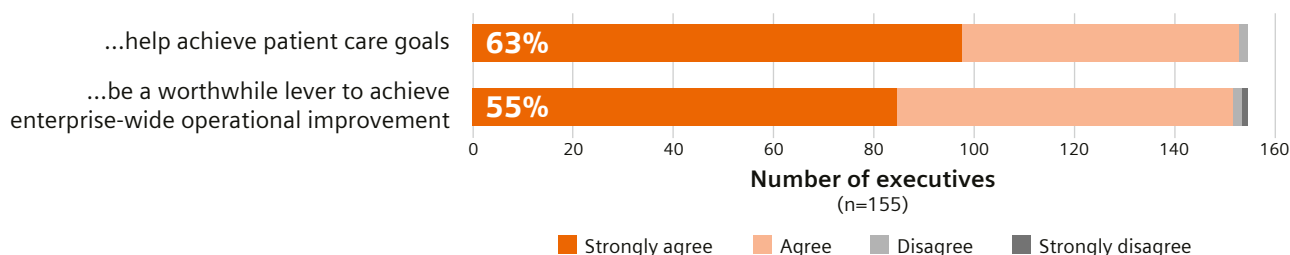
say their organization **considered** changes to their laboratory services in the past 12 months, from expanding infrastructure to outsourcing operations



78% acted
(n=148)



Healthcare executives say optimizing their laboratory operations would...



In the past 12 months, their organizations considered:



59%

expanding laboratory infrastructure



44%

expanding test menu



34%

creating new laboratory services



24%

acquiring laboratory services



Meanwhile,

32%

considered **consolidating** laboratory operations

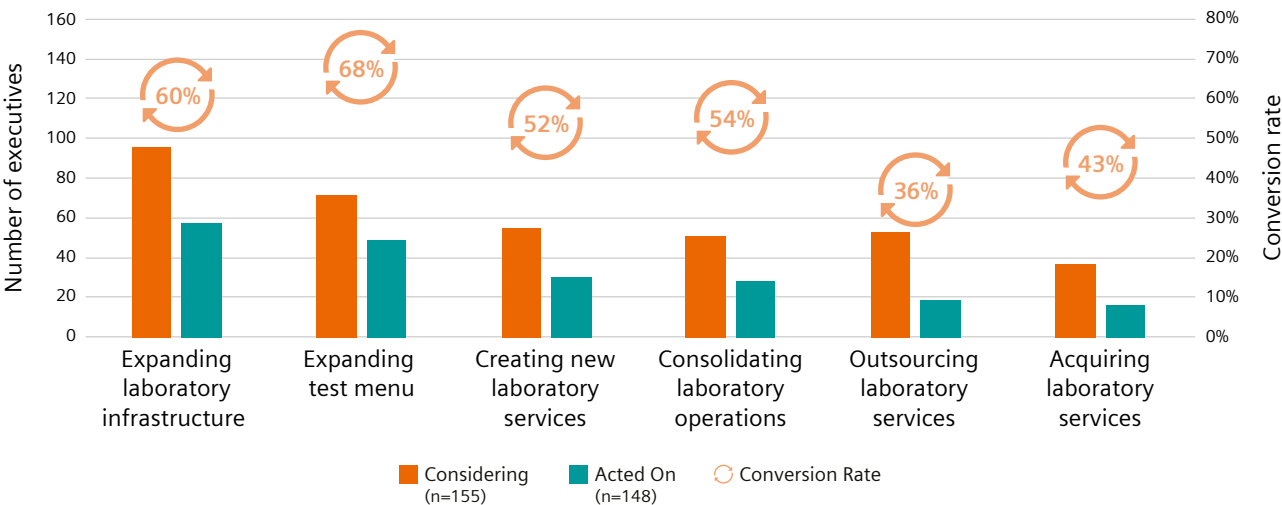
Outsourcing

About one-third of healthcare executives surveyed considered outsourcing their lab services. Though, outsourcing had the largest relative drop-off from action considered to action taken—just over one-third (36%) followed through with outsourcing, while others pivoted to other actions (60%) or did not act (28%). A qualifying factor for this survey was that lab services are performed on-site or within the institution; therefore, the organizations who have outsourced still maintain some in-house testing.

The laboratory lever, continued

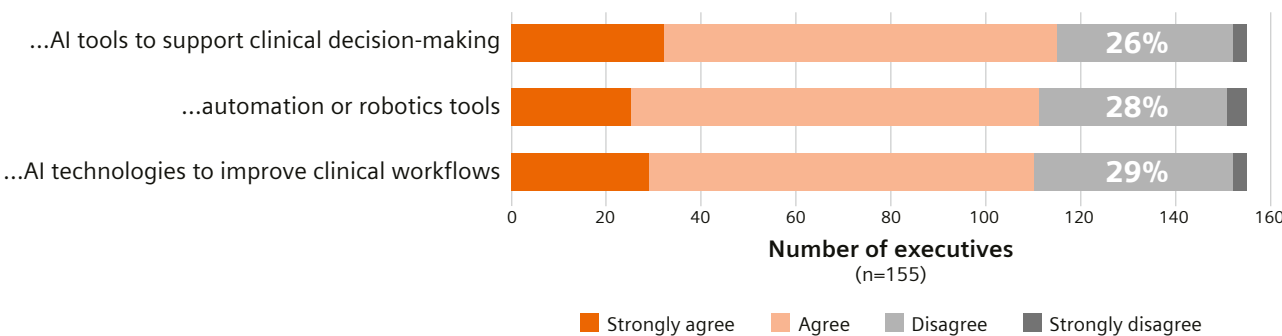
Laboratory services considered versus implemented

Healthcare executives share which changes they considered, and which they implemented, in the past year



Survey responses with the **starkest disagreement** pertained to adoption of technologies that reduce manual workloads for overtaxed staff and offer organizations improved quality, consistency, and operational resilience. This reveals a clear opportunity for laboratory leaders to strengthen their cost-benefit analyses with real-world success stories, which can be obtained through experienced vendor partners or fellow lab leaders.

Healthcare executives say their organizations have adopted*...



*This technology adoption pattern is also consistent for executives who agree they have faced lab staff shortages.

Unclear cost-benefit analyses stall progress

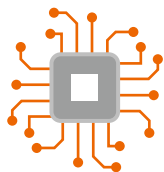
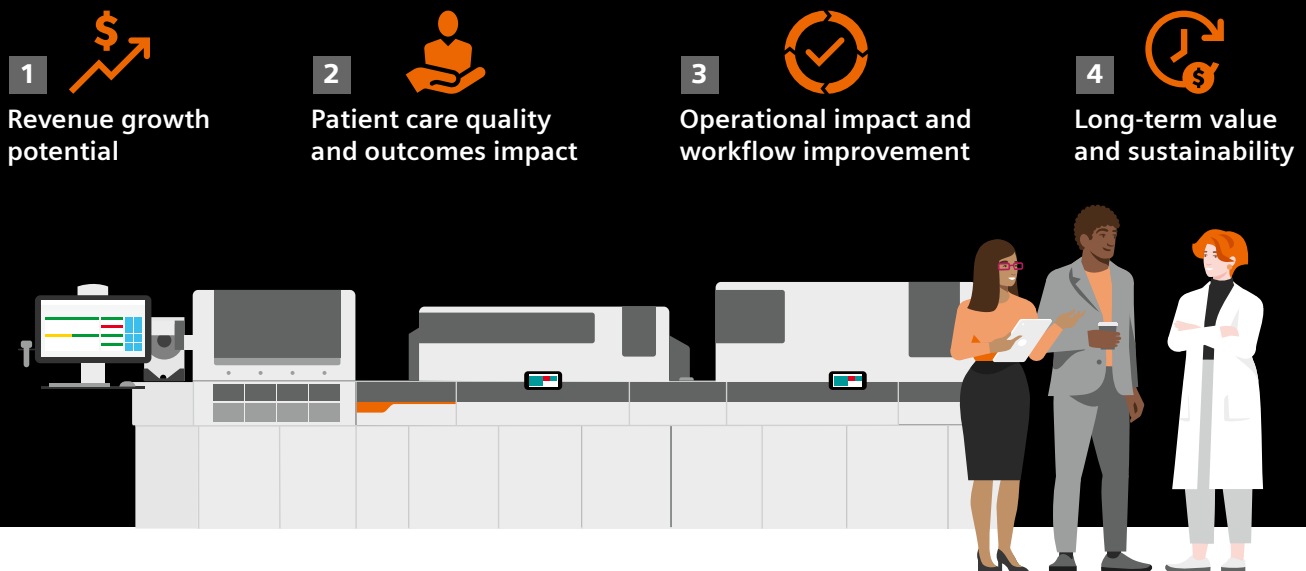


Insight ▶ Sustaining the organization's financial performance leads the top issues keeping healthcare executives awake at night. Patient satisfaction and clinical quality outcomes are the two pain points that follow and more closely align with widely agreed upon benefits respondents aim to gain from new technology. They recognize the lab's potential as a value lever for their organization and laboratory improvements are actively under consideration—but execution is often stalled when the cost-benefit analysis is unclear.

Revenue growth potential emerged as the dominant lens through which executives say they approach capital equipment purchases, though **impact on patient care quality and outcomes** and **operational or workflow improvement** are nearly as important.

For executives **who agree they have had lab staff shortages**, patient care quality and outcomes impact was the most important—another key takeaway laboratory leaders might consider leveraging.

The C-Suite's primary approach to capital equipment purchases



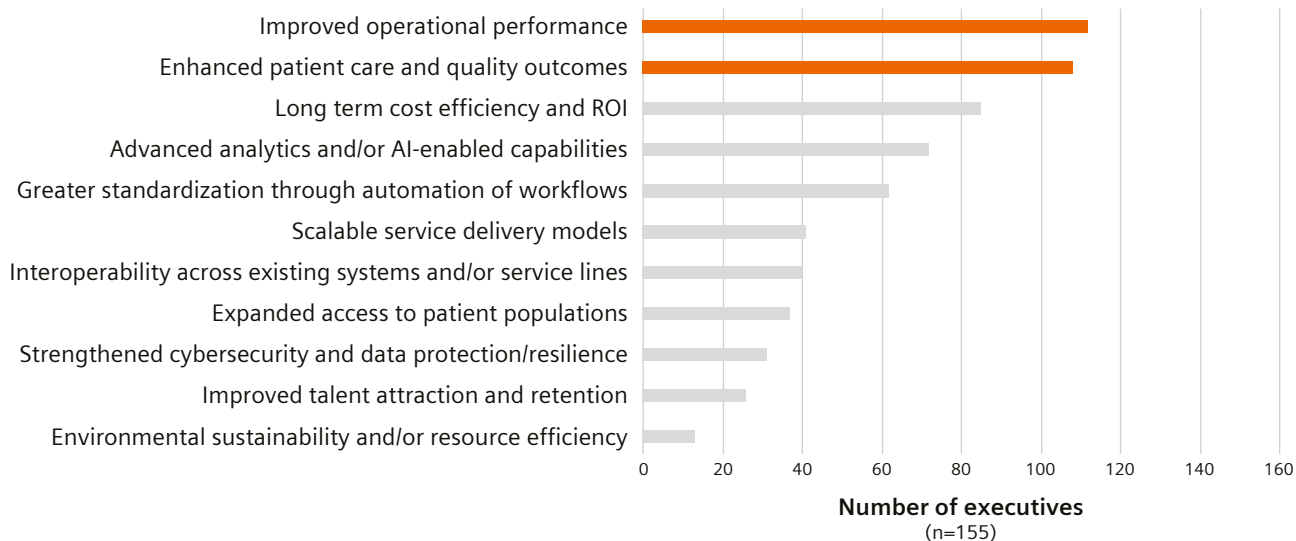
The benefits healthcare executives aim to gain from technology upgrades that **they are currently prioritizing** are most aligned with operational resilience and patient care.

72%
want improved
operational
performance

70%
want enhanced
patient care and
quality outcomes

Unclear cost-benefit analyses stall progress, continued

What benefits does the C-suite aim to gain from technology investments on their radar?



When considerations stall, healthcare executives say the primary reason is that the cost versus benefits remains unclear (31%)—financial investment hurdles were secondary (19%). Notably, 16% said they were unsure how to optimize their operations, highlighting an area where an experienced vendor partner can provide clarity.

Turning insights into strategic impact

The survey indicates that healthcare executives recognize the laboratory's importance to patient care and organizational performance, but recognition alone does not guarantee action. When staffing pressures, aging infrastructure, and operational constraints are not fully understood—or when the value of investment is not clearly articulated—progress stalls.

For laboratory leaders, the opportunity is to connect laboratory needs to **the priorities that matter most** to the C-suite.

Those who do will be better positioned to move the lab from an acknowledged necessity to a strategic driver of health system success.



How can this be achieved?



Listen first.

Understand the challenges the C-suite is trying to solve: Sustaining financial performance, improving patient satisfaction and experience, and reducing clinical errors and improving quality outcomes.



Earn a seat in strategic planning conversations.

Position the lab as a partner in cross-functional planning, service line growth, and system-wide performance improvement. Leverage advocates within the organization who benefit from optimal laboratory operations.



Build investment cases around clear business problems.

Uncertainty around how to optimize lab operations stalls progress. Frame technology and staffing requests around concrete challenges to show how lab investment will help solve broader organizational problems. Engage potential vendors early, leveraging their expertise to build a cost-benefit analysis based on real-world scenarios.



When met with resistance, consider high-value, lower-investment options as a starting point.

Technology that can deliver near-term ROI and scalable efficiency may help nudge hesitant executives who want long-term value from their capital equipment investments toward larger allocations. Certified refurbished technology also can be an affordable option.

Optimization

At Siemens Healthineers, we pioneer breakthroughs in healthcare. For everyone. Everywhere. Sustainably. As a leading medical technology company, we want to advance a world in which breakthroughs in healthcare create new possibilities sustainably. We partner with healthcare providers to address their most pressing challenges so that they can deliver high-quality, patient-centered care, efficiently.

We are active in the areas of imaging, diagnostics, cancer care, and minimally invasive therapies, augmented by digital technologies and artificial intelligence. With our unique combination of strengths in Patient Twinning,* Precision Therapy, as well as Healthcare AI, we take on the greatest challenges in healthcare. We help improve access to healthcare for underserved communities worldwide and overcome the most threatening diseases.

We are a team of around 74,000 Healthineers in over 70 countries passionately pushing the boundaries of what is possible in healthcare so that patients can live with hope, not fear of disease.

**Early detection, accurate diagnosis, individualized therapy selection, simulation and planning, continuous monitoring and aftercare.*

All trademarks are the property of their respective owners. Product availability may vary from country to country and is subject to varying regulatory requirements. Please contact your local representative for availability.

Methodology

YouGov research group, on behalf of Siemens Healthineers, interviewed 160 respondents who were identified as healthcare executives. Qualified respondents needed to hold a senior leadership position (e.g., C-suite, department head, VP, or equivalent executive role) within a healthcare organization where laboratory testing is performed on-site or within their system or network. After collection, the data was reviewed for quality and authenticity, resulting in a final sample of n=155.

Siemens Healthineers Headquarters

Siemens Healthineers AG
Siemensstr. 3
91301 Forchheim, Germany
Phone: +49 9191 18-0
siemens-healthineers.com

Published by

Siemens Healthcare Diagnostics Inc.
511 Benedict Avenue
Tarrytown, NY 10591-5005
USA
Phone: +1 914-631-8000