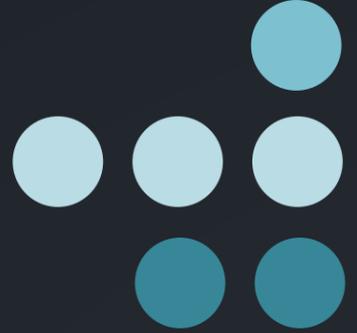


Behavioral Health  
Industry Outlook 2022:

# Optimism Driving Staffing, Growth and Census





# Behavioral Health Industry Outlook 2022: **Optimism Driving Staffing, Growth and Census**

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On the heels of a pandemic-fueled operating landscape, behavioral health care providers are refocusing their attention on growth and innovation. With demand for behavioral health services continuing to rise, lingering uncertainties along with new opportunities will play a role in shaping the industry's outlook on 2022.

Our inaugural Behavioral Health Business (BHB) survey reveals great optimism about where the industry is headed in 2022, and explores the different layers of that sentiment. From staffing challenges to referral growth and much more, BHB subscribers share the approaches they are taking today to meet their patients' evolving needs.

BHB is pleased to share these survey results in hopes that they will provide perspective around operational challenges and opportunities in the year ahead.

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**John Yedinak**  
Founder, Behavioral Health Business



● Executive Summary  
● ● ● **2022 Behavioral Health News**  
● ● **Outlook Survey and Report**

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Results comprise the views of 84 behavioral health care professionals polled about their thoughts on the behavioral health industry looking ahead to 2022. The survey, conducted online among Behavioral Health Business subscribers between November 15, 2021, and January 17, 2022, asked how organizations are:

- Navigating the staffing crisis in behavioral health
- Identifying new growth opportunities in 2022
- Approaching operations in the wake of the pandemic

The majority of respondents identified as executives at behavioral health care providers, primarily serving mental health and addiction / substance-use disorder patients in outpatient settings. The organizations represented in this report reflect a variety of payment and clinical models across the behavioral health space.

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## Key takeaways

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**Staffing continues to be a significant pain point in 2022 and will cause ongoing challenges.** Sixty-eight percent of respondents reported that staffing is their greatest non-COVID-related challenge and most significant expense in the year ahead.



**The pandemic is driving census in behavioral health organizations.** More than half of respondents indicated that census has increased due to COVID-19.



**Behavioral health organizations are expecting referral growth through a variety of sources in the year ahead.** Community referrals, online / internet searches and physician offices are anticipated to be the key referral growth areas in 2022.

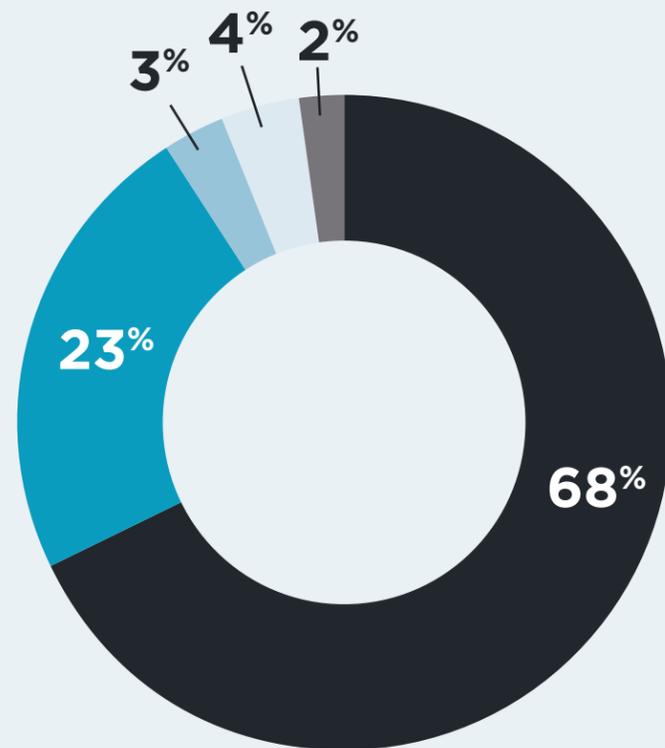


**Providers are refocusing their attention on new areas of opportunity.** Mental health and addiction / substance-use disorder are the most attractive investment targets this year, sparking opportunities to expand service offerings and pursue value-based relationships.

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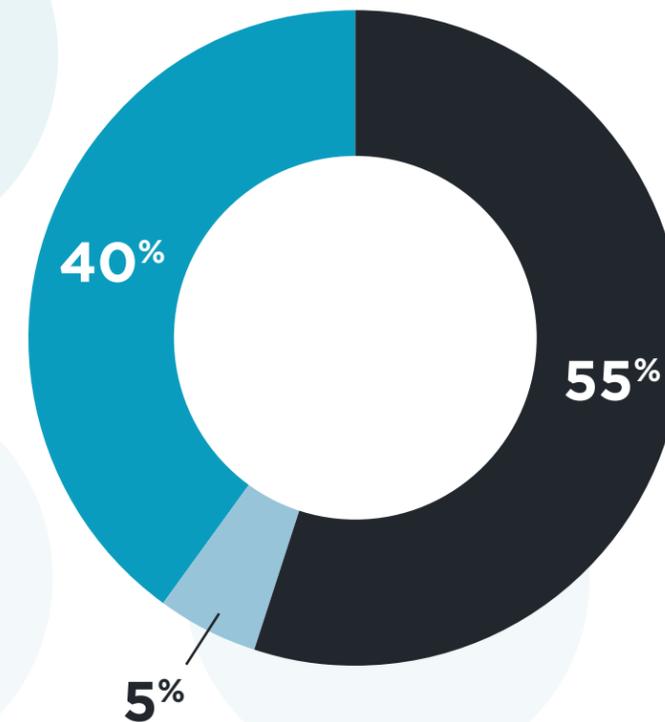
# The 2022 Outlook on Behavioral Health

Sixty-eight percent of respondents cited staffing as the greatest non-COVID-related challenge to the behavioral health industry in 2022.



**What is the greatest non-COVID-related challenge to the behavioral health industry in 2022?**

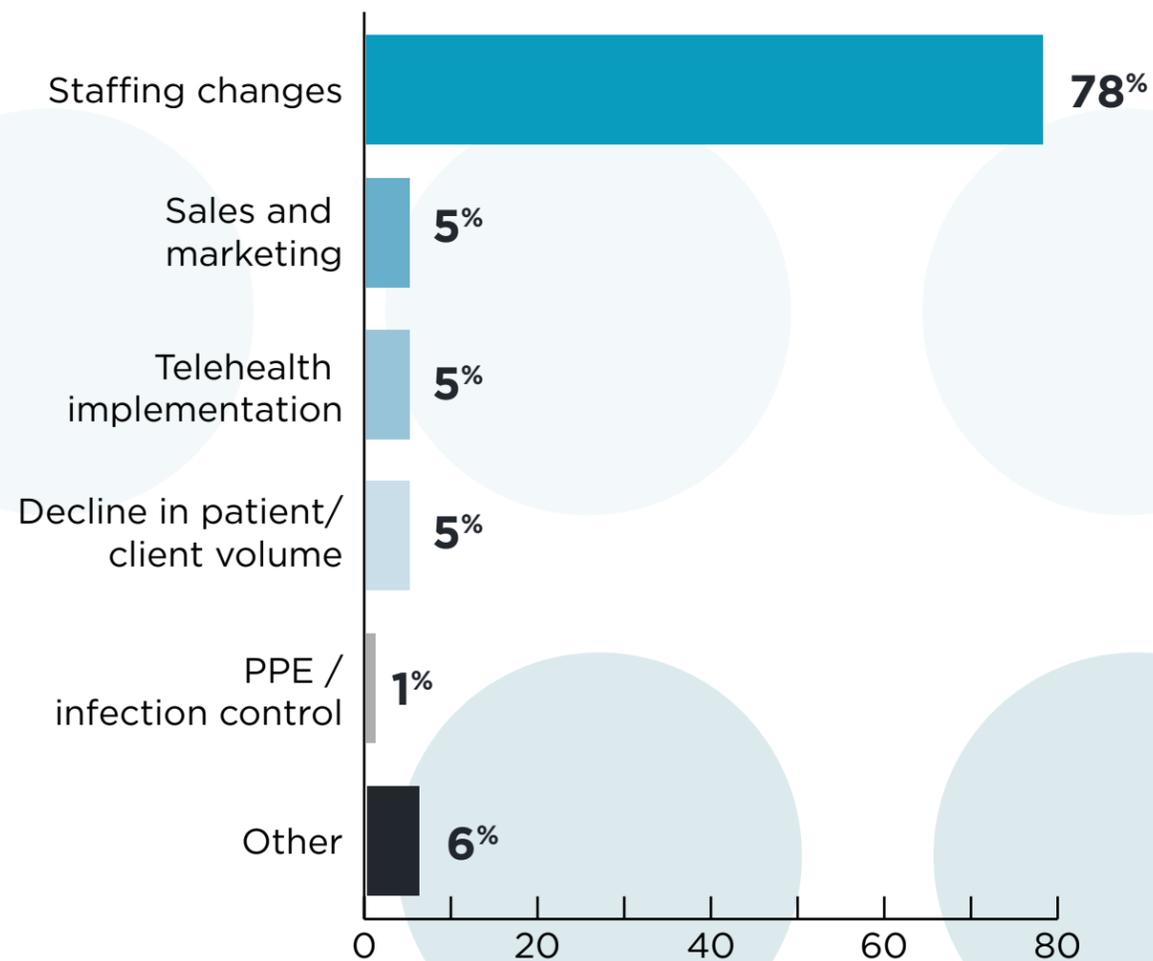
Nearly all participants (95%) expect telehealth use to either increase or at least remain constant in 2022 compared to 2021.



**How do you expect telehealth use in behavioral health will change in 2022 relative to 2021?**

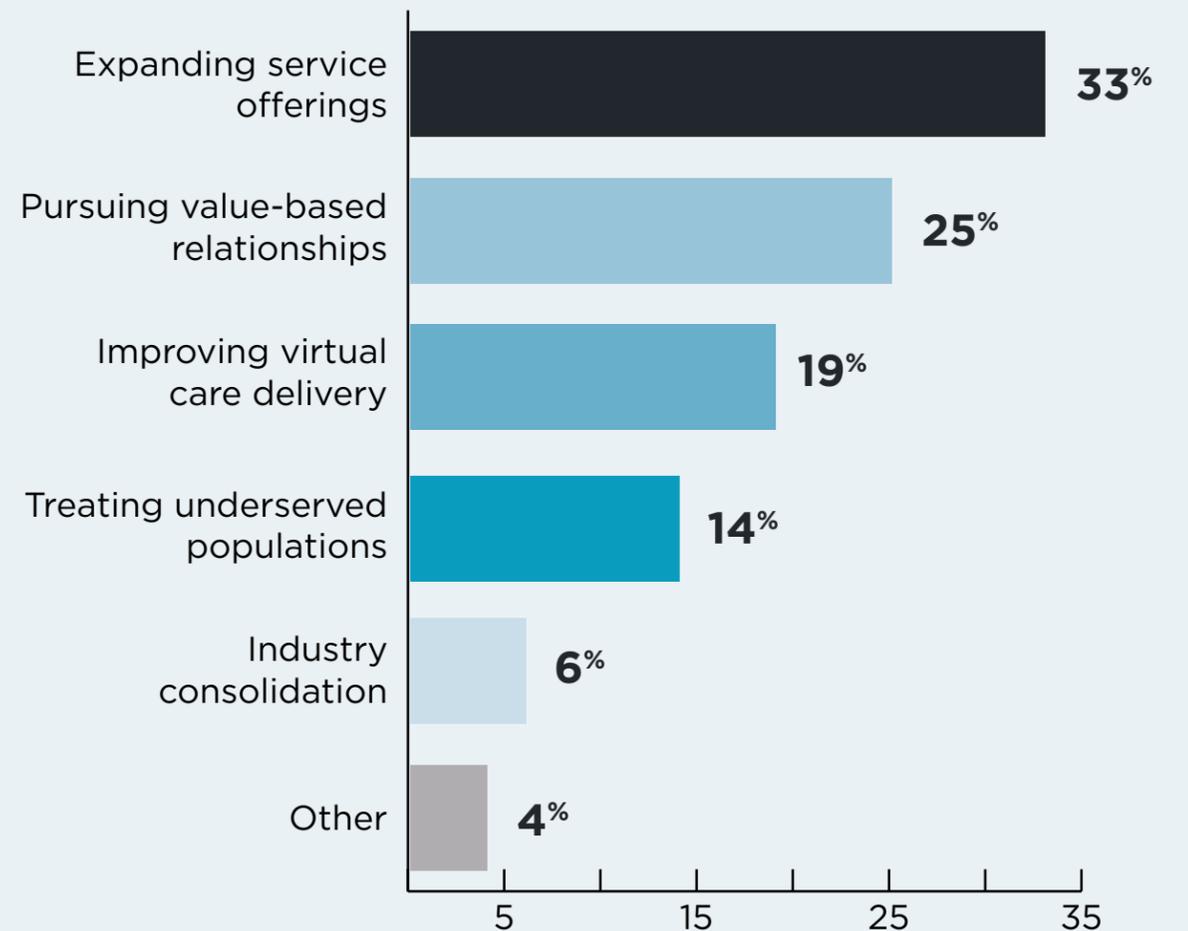
Seventy-eight percent of participants expect staffing changes to be the greatest COVID-related expense in behavioral health this year.

**What is the greatest area of expense the behavioral health industry will face in 2022 relating to COVID-19?**



Respondents expect the expansion of service offerings (33%) and the pursuit of value-based relationships (25%) to be the greatest opportunities for behavioral health providers in 2022.

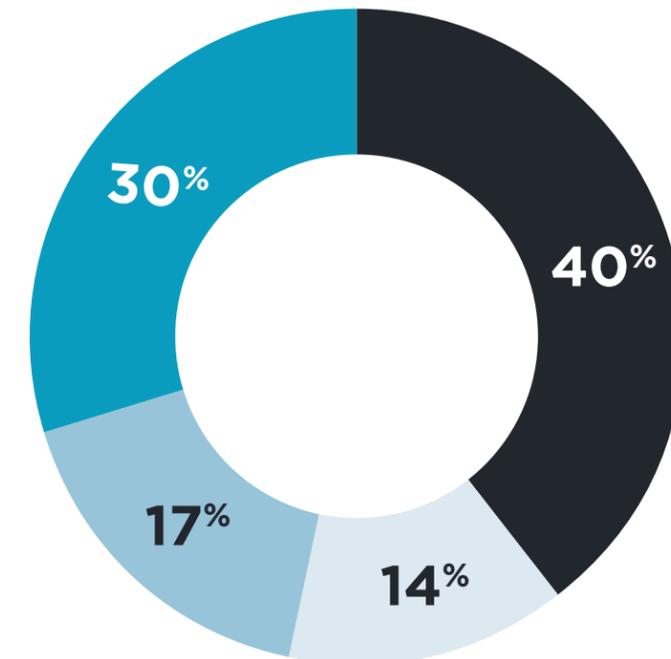
**What is the greatest opportunity for the behavioral health industry in 2022?**





More than half of participants (56%) reported that census has increased in their organizations as a result of the pandemic.

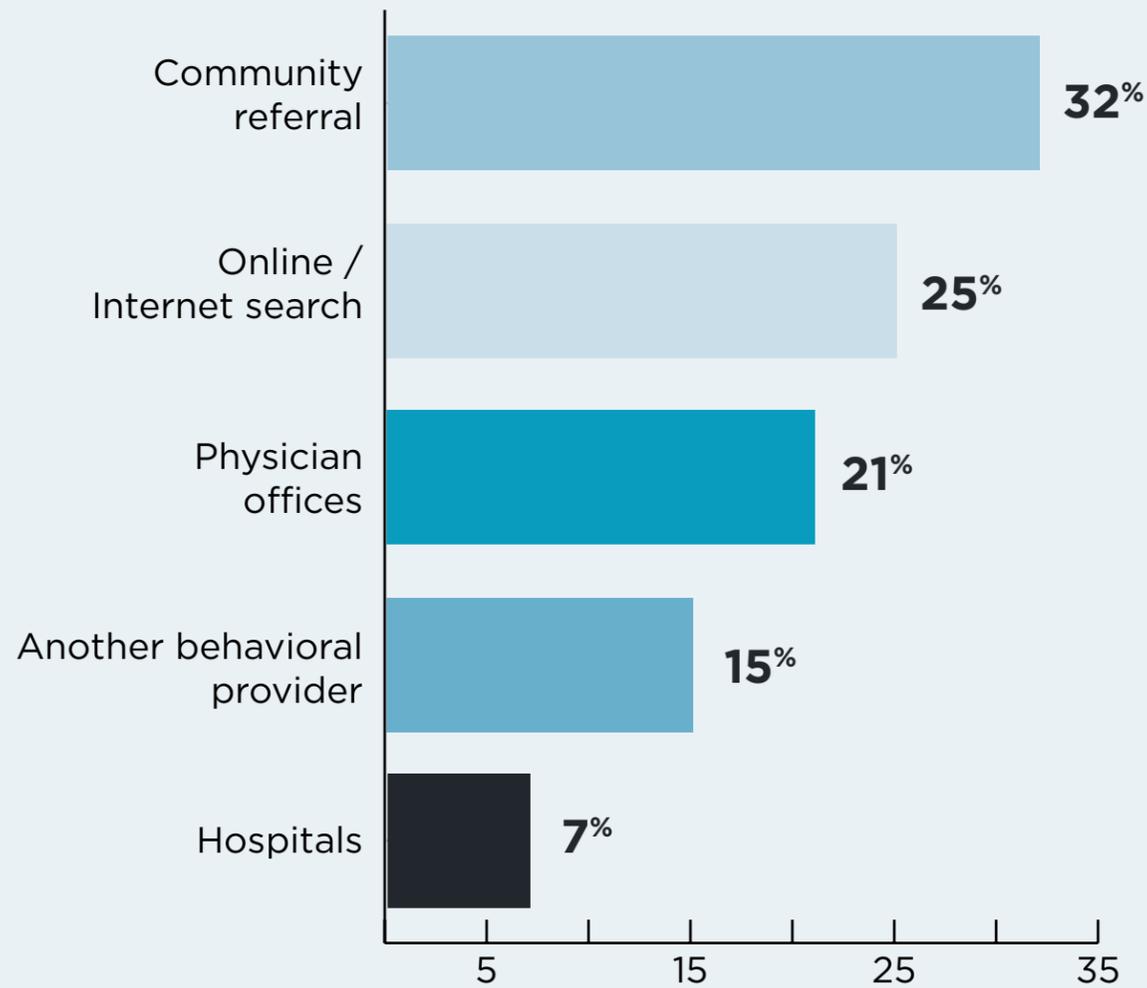
**How has the COVID-19 pandemic impacted your organization's census?**



- 40% - Census has increased
- 14% - Census has decreased
- 17% - Census has remained consistent
- 30% - N/A

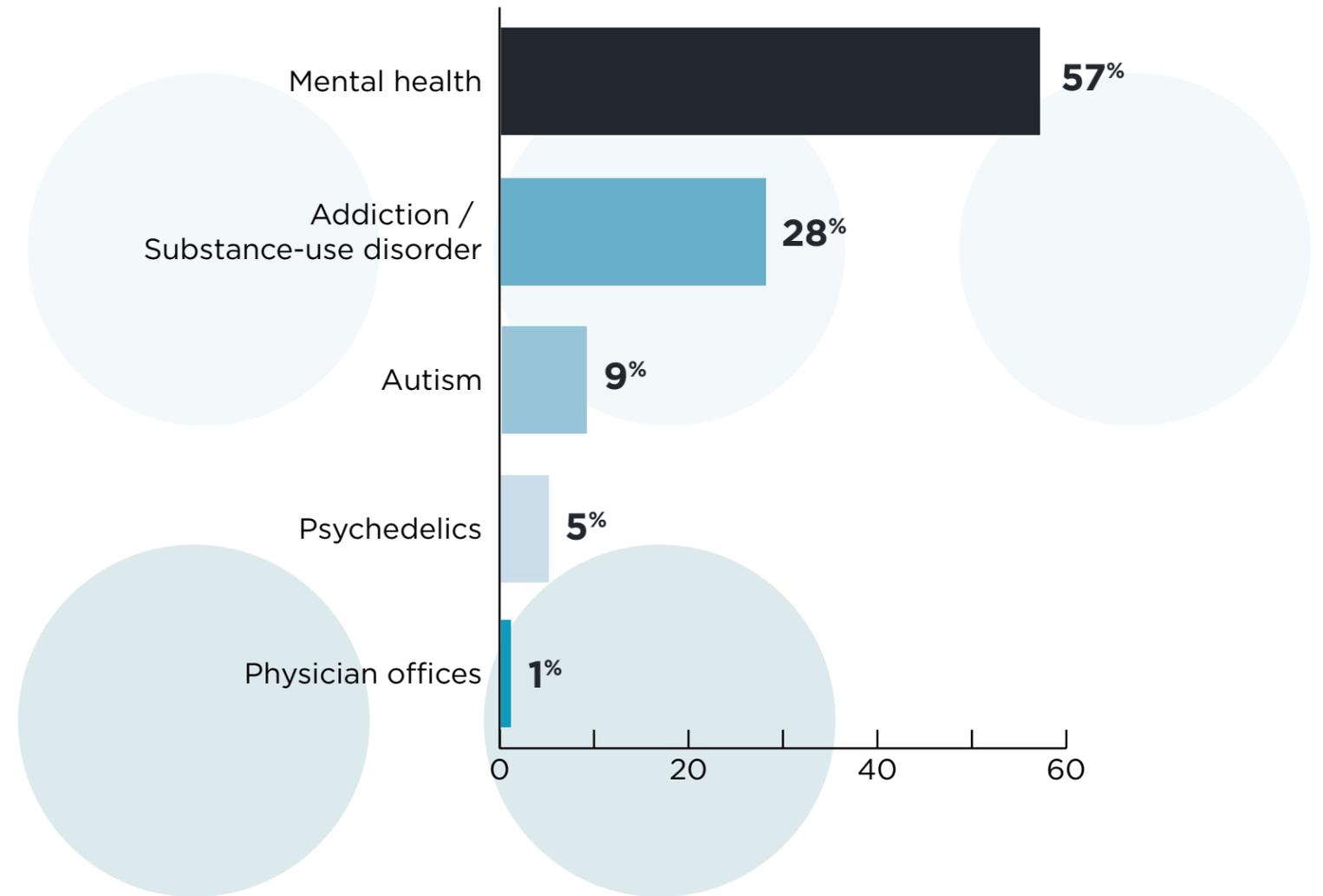
Community referral (32%), online / internet search (25%) and physician offices (21%) are anticipated to be the key referral growth areas in the year ahead.

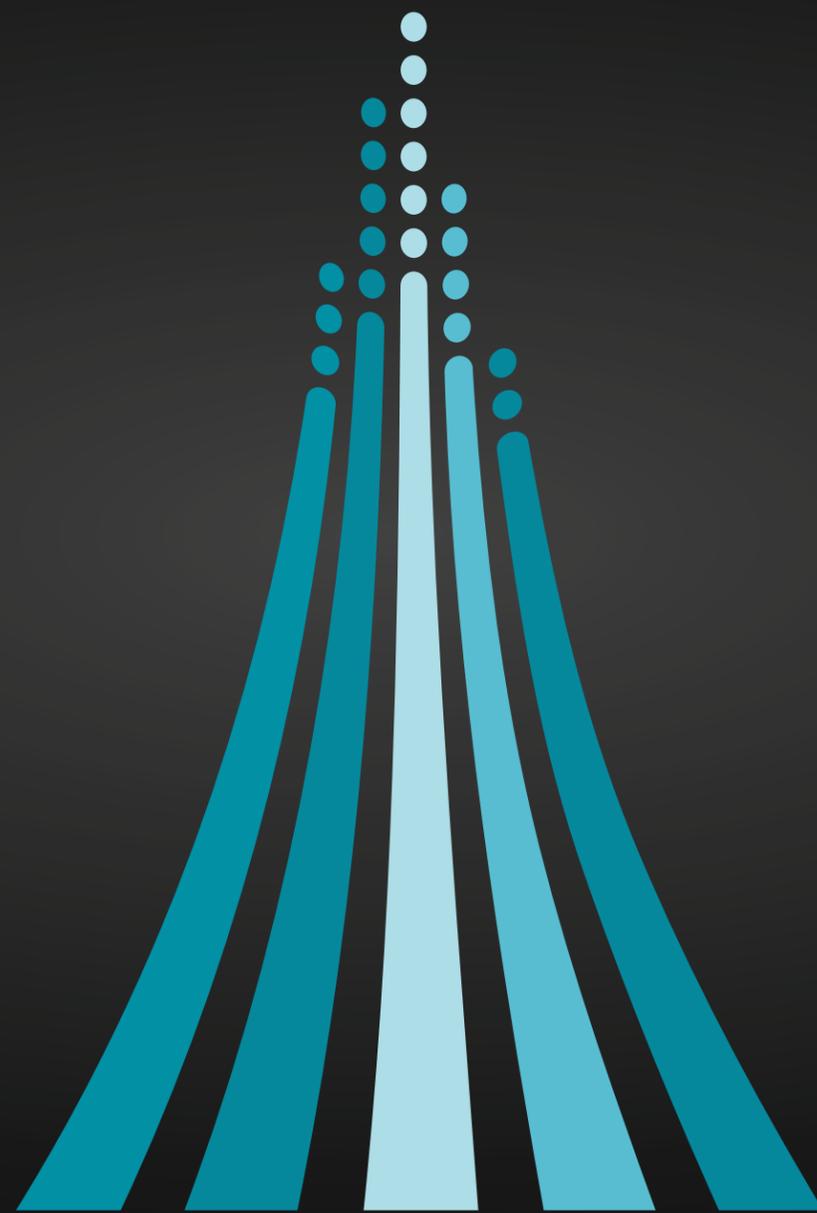
**Where do you anticipate referral growth will be greatest in 2022?**



Mental health (57%) and addiction / substance-use disorder (28%) are the most attractive investment targets for behavioral health organizations in 2022.

**Which of the following represents the most attractive investment target in behavioral health in 2022?**





For more Information, contact us at:  
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