



Beyond the Pandemic: Four Trends in Healthcare Digital Transformation

New HIMSS research shows priorities shifting to patient experience, network modernization and security and compliance

In the early months of the COVID-19 pandemic, healthcare organizations pivoted their digital health strategies and resources to accommodate distancing restrictions for patients and employees. Many fast-tracked digital transformations, improved online portals, adopted telehealth services and added network and security controls for remote users.

Three years later, these organizations are deciding what's next. Where should they invest to meet the rise of healthcare consumerism and maintain regulatory compliance? How can they improve the telehealth experience for both patients and clinicians? What technologies can ease physician and clinician burden? And how can they best prepare for the next large-scale public health event?

A recent study sponsored by Spectrum Enterprise® and conducted by HIMSS Market Insights¹ points to shifting short- and long-term priorities for digital transformation. Researchers conducted online surveys from November to December 2022 with 102 key healthcare decision-makers and influencers from various sizes and types of organizations.

This paper presents the survey results within each of the top four trends, so all healthcare organizations can prepare now for what lies ahead and how their digital transformation can help them meet changing consumer and clinician needs.

RESEARCHERS DISCOVERED FOUR TRENDS INFLUENCING DIGITAL HEALTH TRANSFORMATIONS:

- The rise of consumerism
- Closing gaps in telehealth services
- Preparing for the next large-scale public health event
- Clinician burnout

Healthcare consumers demand a personalized, holistic digital experience

As technology becomes more prevalent in their daily lives, patients increasingly expect digital options throughout the patient journey.



More than 80% of healthcare decision-makers agreed that their patients are demanding a more personalized, holistic digital experience.

The HIMSS Market Insights study shows that most healthcare organizations are now embracing a digital-first approach to care delivery compared to before the start of the pandemic (Figure 1).

Even before COVID-19 forced healthcare facilities to lock down and workforces to become remote, healthcare consumers wanted convenient access to healthcare services from anywhere. The pandemic, however, accelerated the adoption of digital health out of necessity.

One response to this rise of consumerism is newer patient communication models like the *digital front door* – a strategy for engaging patients at every major touchpoint of the patient journey using technology that patients have already adopted for everyday use. Examples of digital front door technologies

and platforms include patient portals and mobile apps for scheduling and changing appointments, text messaging securely with a provider, accessing lab results easily and requesting prescription refills online.

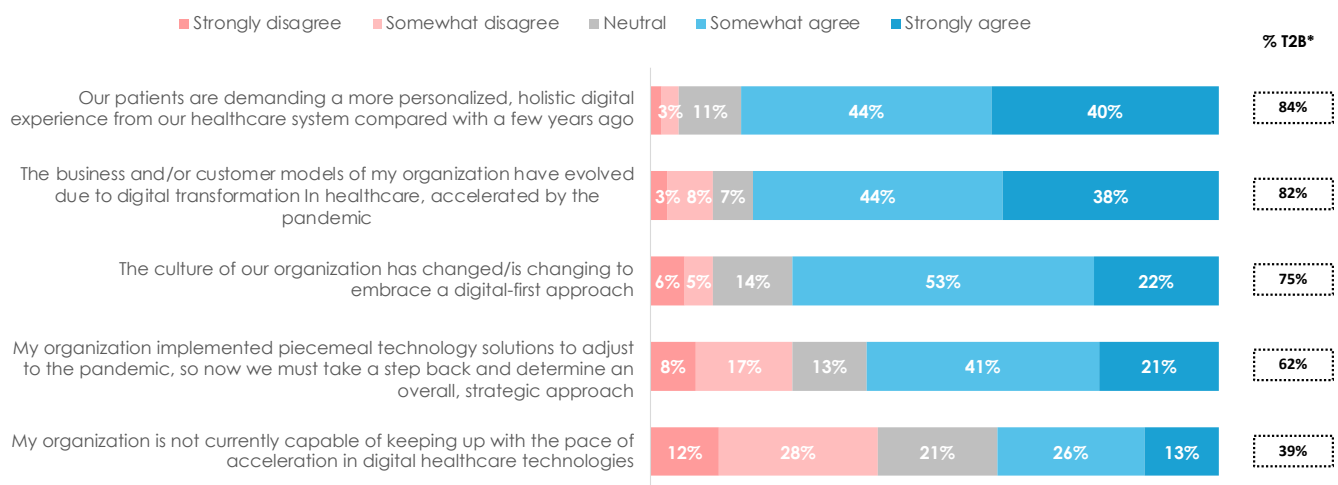
The digital front door helps healthcare consumers avoid the hassle of conducting the same tasks by phone or in person. In addition, it also saves providers time that is better spent on direct patient care.

Telehealth is now mainstream for some, but not all

Use of telehealth services rose sharply in the first two years of the pandemic. Once the Centers for Medicaid & Medicare Services (CMS) approved telehealth services for Medicare

Figure 1. Most survey respondents are seeing more patients demanding a more personalized, holistic digital experience than prior to the pandemic.

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



*%T2B = A Top 2 Box score (also called T2B) combines the highest 2 responses of the survey scale to create a single number.

Data labels under 3% not shown

Q1. Please rate your level of agreement with each of the following statements.

Base: Total Respondents; n = 102



All communications and collaboration must occur over a highly secure platform that is HITRUST-certified to protect the healthcare organization and the patient.”

ANDREW CRAVER | Vice President of Segment Marketing | Spectrum Enterprise

enrollees in response to the pandemic, telehealth use jumped from 5 million sessions between April and December in 2019 to 53 million sessions during the same months in 2020.²

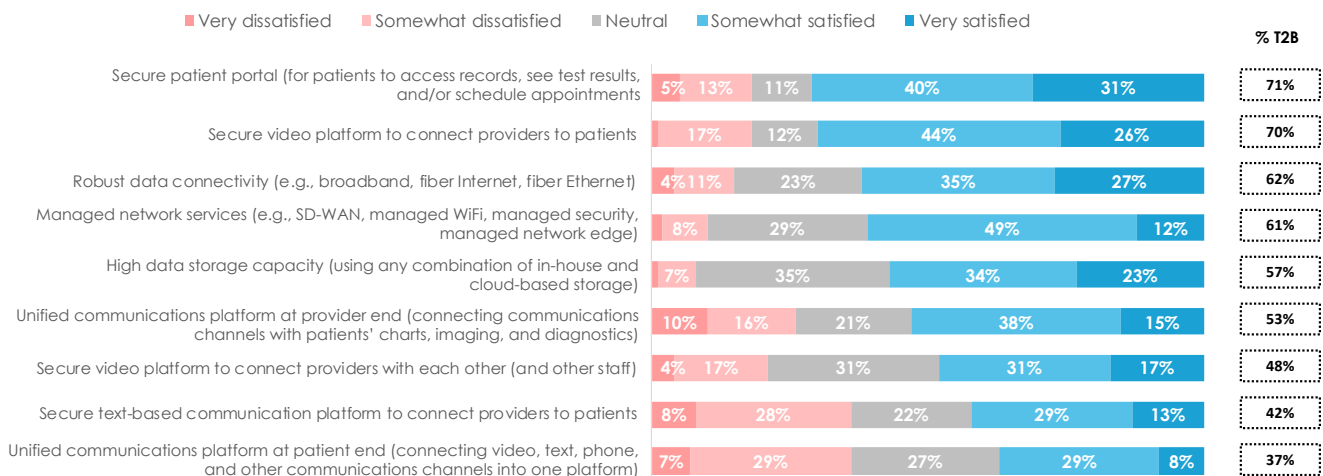
These phone- and video-based sessions were convenient for patients and helped control care delivery costs after revenues from inpatient visits and elective surgeries dropped sharply. Survey respondents were *most* satisfied with their telehealth service’s secure patient portal, the secure video platform connecting providers to patients and its robust data connectivity. They were *least* satisfied with unified communications platforms on the patient end of telehealth transactions (Figure 2).

Closing these technology gaps is important to improving the patient experience whether these unified communications platforms are used to call, text, message, locate clinicians or share documents in real time, according to Andrew Craver, Vice President of Segment Marketing for Spectrum Enterprise, which offers a variety of internet, networking, television and voice and collaboration solutions for healthcare providers.

“But that’s not enough,” he said. “All communications and collaboration must occur over a highly secure platform that is HITRUST-certified to protect the healthcare organization and the patient.”

Figure 2. Respondents were most satisfied with their telehealth services’ secure patient portals and video platforms, but much less satisfied with their secure communications platforms.

When thinking of your organization’s telehealth services today, please rate your overall satisfaction when it comes to performance in each of the following technology areas.



Data labels under 3% not shown

Q7. When thinking of your organization’s telehealth services today, please rate your overall satisfaction when it comes to performance in each of the following technology areas.

Base: Total Respondents; n = 102



Looking ahead, 79% said data security/cybersecurity was their top priority, followed by 58% who were focused on regulatory compliance and/or staff training/support.

It's worth noting that 83% of executives, vice presidents and directors and 77% of organizations with 2,500 or more employees were satisfied with their organization's secure video platform connecting providers to patients. Meanwhile, 76% of technology leaders were pleased with their managed network services – such as SD-WAN, WiFi, managed security and network edge solutions. These are the type of technologies providing the backbone for healthcare's digital transformation.

Providers are not yet fully prepared to digitally transform

Most respondents believed their organizations were highly prepared to address both data security and regulatory compliance tied to their digital transformation. More than half

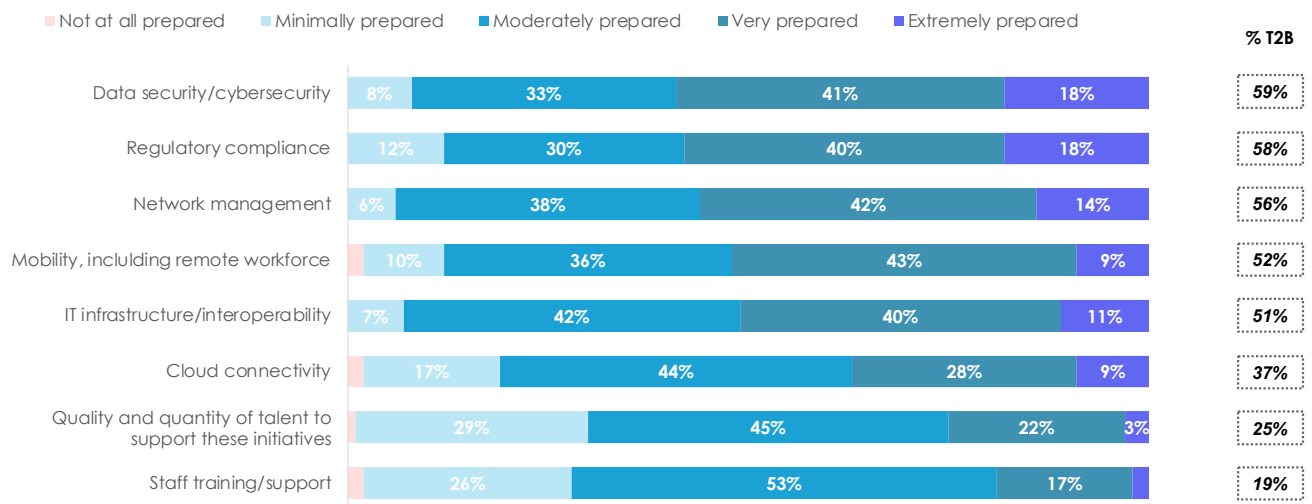
were also confident in their network's management, mobility and IT infrastructure and interoperability as part of their digital transformation (Figure 3).

Looking ahead, 79% said data security/cybersecurity was their top priority, followed by 58% who were focused on regulatory compliance and/or staff training/support. The lowest priority in the next 12 months involved cloud connectivity (39%).

Those priorities are expected to shift over the next few years as more fully implemented digital transformation projects bring focus to the talent and skills (54%) needed to support these changes – followed by IT infrastructure and interoperability/information sharing (49% each). Cloud connectivity (47%) will also grow in importance, while data security (41%) and network management (35%) are projected to drop.

Figure 3. Healthcare organizations rated themselves more prepared in security and compliance over hiring skilled talent and providing staff training.

How would you rate your organization's preparedness required for digital transformation in each of the following areas?



Data labels under 3% not shown

Q5. How would you rate your organization's preparedness required for digital transformation in each of the following areas?

Base: Total Respondents; n = 102



Leveraging technology that’s intuitive and easy to use can ease the burden on clinicians and help improve their productivity and ability to provide better patient care.”

ANDREW CRAVER

This makes sense to Craver, who sees technology providers stepping up their game to deliver solutions that meet future digital transformation needs such as the ability to handle large volumes of data traffic and devices on a network without compromising on speed, latency and cybersecurity protections. “Technology providers can assist with healthcare organizations’ preparedness by enabling continuous security authentication in real time with zero trust security technology,” he said.

By partnering with trusted solutions providers to manage connectivity, infrastructure and cybersecurity issues, healthcare organizations can devote more resources to other key areas, including adding more qualified talent to support their digital transformation.

Addressing issues tied to clinician burnout

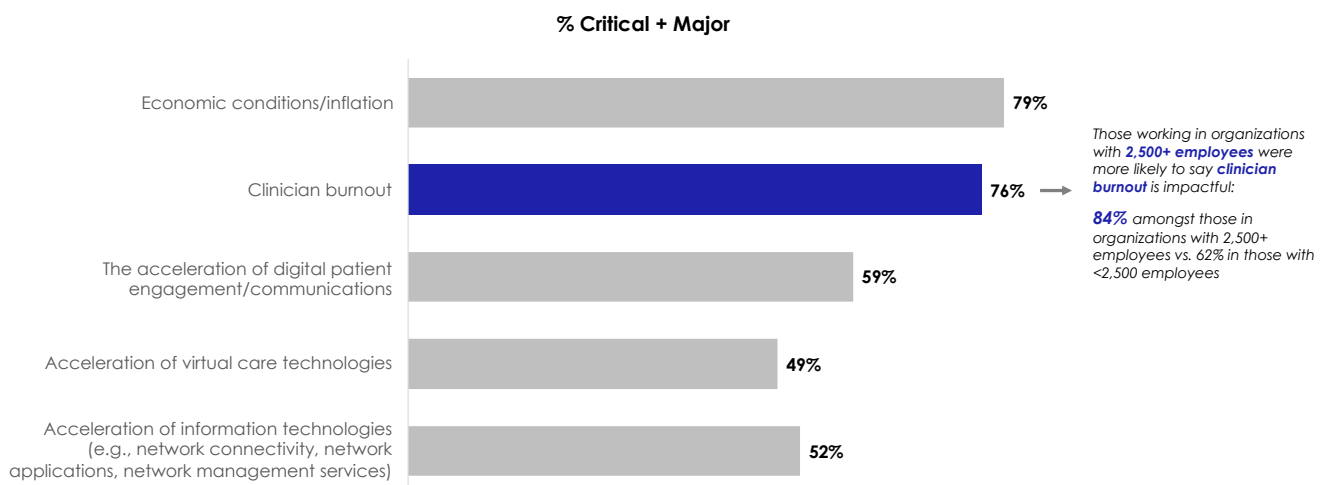
A fourth trend revealed in the HIMSS Market Insights research is the impact of clinician burnout on healthcare organizations (Figure 4). Among those surveyed, more than three-quarters of respondents said clinician burnout was a major or critical issue.

“Leveraging technology that’s intuitive and easy to use can ease the burden on clinicians and help improve their productivity and ability to provide better patient care,” Craver said.

The need to ease clinical workloads (and subsequent stress levels) – as patient loads increase and healthcare workforces decrease – means providers must learn to do more with fewer staff. Healthcare leaders must find a way to incorporate technologies that reduce clinician burden, rather than add to it.

Figure 4. Most organizations, especially larger ones, still struggle with clinician burnout.

How impactful are each of the following on your organization today?



Q3. How impactful are each of the following on your organization today?
Base: Total Respondents; n = 102



Eighty-four percent believe they could effectively manage a large-scale health event in the coming years, almost double the 43% who are confident in being able to handle such an event tomorrow.

The way forward for digital transformation

Organizations are hopeful that the digital health transformation work done today will make them more resilient in the future. Almost double the number (84%) believe they could effectively manage a large-scale health event in the coming years than the 43% confident in handling such an event tomorrow.

Those currently less confident were most likely to cite financial issues, limitations of current technology and staffing issues as obstacles preventing that preparedness.

Healthcare's digital transformation has long been characterized as an ongoing process driven by technological advancements, regulatory changes and shifting patient expectations. Issues

around data privacy and security, IT infrastructure and interoperability, and provider and patient readiness will remain priorities in coming years. So will the need to find technology solutions to healthcare's most pressing issues, including ways that modern care delivery can reduce clinician burnout.

Organizations may not have fully realized the importance of a digital-first approach to healthcare prior to the pandemic. But this HIMSS Market Insights study shows that they recognize it now.

Visit [Spectrum Enterprise](#) to learn more about digital healthcare transformation.

References

1. HIMSS Market Insights. December 2022. *Enterprise Digital Health Transformation Study*. November and December 2022.*
2. U.S. Government Accountability Office. 29 Sept. 2022. Telehealth in the pandemic—how has it changed health care delivery in Medicaid and Medicare? *WatchBlog*. <https://www.gao.gov/blog/telehealth-pandemic-how-has-it-changed-health-care-delivery-medicaid-and-medicare>.

*This survey was conducted among 102 qualified respondents in executive leadership, IT/technology, clinician leadership and other clinical roles for multi-hospital systems, integrated delivery networks, academic medical centers, ambulatory/outpatient practices, stand-alone hospitals/specialty/children's hospital and clinic/practice settings in the United States. Spectrum Enterprise was not identified as the survey sponsor.

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