

2020 REPORT

The State of Healthcare Communications

TRENDS AND DATA FROM MORE THAN
600 HEALTHCARE PROFESSIONALS



Introduction

2020 has brought one of the most difficult and unprecedented periods in healthcare. During these uncertain times, we continue to be awed and inspired by healthcare workers, many of whom we're honored to call customers. Amidst challenges most of us will never understand, they continue to show up, put in strenuous hours, alter how they provide care, and exemplify the definition of courage and bravery.

As we look toward the future of healthcare communications, there are many unknowns. Yet one thing is certain:

Healthcare has changed, but the importance of care team communication hasn't.

We surveyed more than 600 healthcare professionals in July 2020 from hospitals and health systems nationwide. This resulting report is an in-depth look at trends, challenges, and predictions for the future of healthcare communications.

While it's a scary time for healthcare, it's also a time rife with opportunity for change. As healthcare organizations plan for the future of communications, our hope is this report can help provide advice, guidance, and helpful information from peers.

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Enterprise communications

For this survey, we defined an enterprise, or hospital-wide, communication solution as one that enables organizations to create economies of scale by addressing multiple communication challenges with fewer solutions. This approach eliminates silos of information and improves the quality of care. It also removes the need for every department to have its own complete system.

For example, if neurologists ask for a secure way to communicate with colleagues in the department, the head of neurology might research and buy a technology solution for that specific department. Problem solved? Not quite. If each department purchases its own solution, communication and collaboration across departments becomes cumbersome and ineffective, which can negatively impact patient care.

Solutions that can connect clinicians and staff across devices and settings is a vital part of care coordination, and an enterprise-wide communication infrastructure is the path to get there.

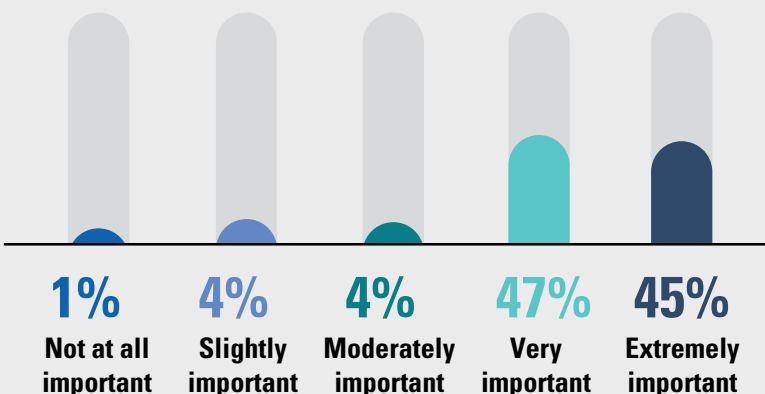


Watch how VCU Health uses enterprise-wide communications in this video

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What we learned

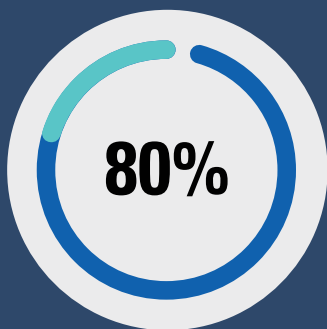
How important is hospital-wide communication technology in improving clinical and operational outcomes?



Approximately 92% of healthcare professionals stated that enterprise communication technology is “very important” or “extremely important” in improving clinical outcomes.

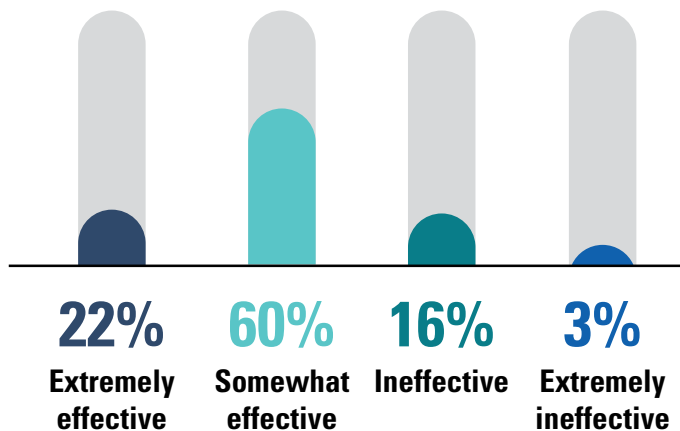


How important is expanding communications across multiple hospitals?



Nearly 80% of healthcare professionals say it's "very important" or "extremely important" to expand communications across multiple hospitals.

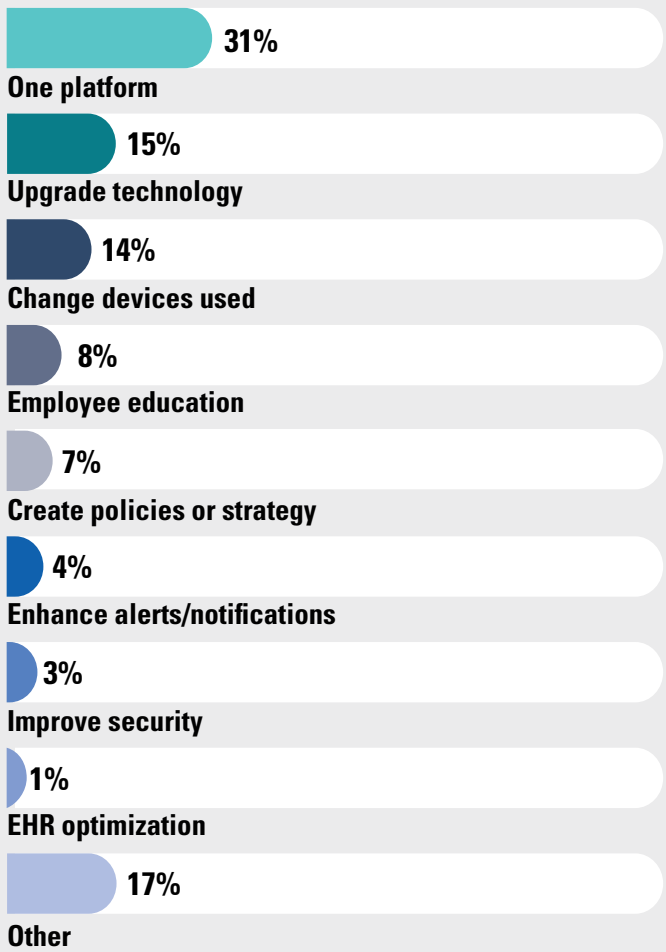
How effective is your organization at adopting hospital-wide communication technologies?



Of those who have hospital-wide communication technologies, adoption of those technologies varies widely. Roughly 19% of healthcare professionals say their organization is "ineffective" or "extremely ineffective" in adoption of those technologies. Only 22% report their organization is "extremely effective" in adoption.

What is one thing you'd suggest doing to improve hospital-wide communications at your organization?

Responses fell into a number of categories, with roughly 31% of healthcare professionals saying a platform that serves as a complete communication solution would improve hospital-wide communications at their organization.



Types of devices










We conducted our first survey on mobile communications in healthcare in 2011. At that time, only 38% of healthcare organizations had mobile technology policies and just 35% of Americans owned smartphones. (The most recent Pew research in 2019 shows that number now is approximately 81%.) Now, healthcare professionals have a plethora of devices at their disposal for clinical communications.

Since 2011, we've asked survey respondents about the types of communication devices their organization supports. This snapshot provides a unique look at how communication devices and technology have changed in healthcare in the past ten years.

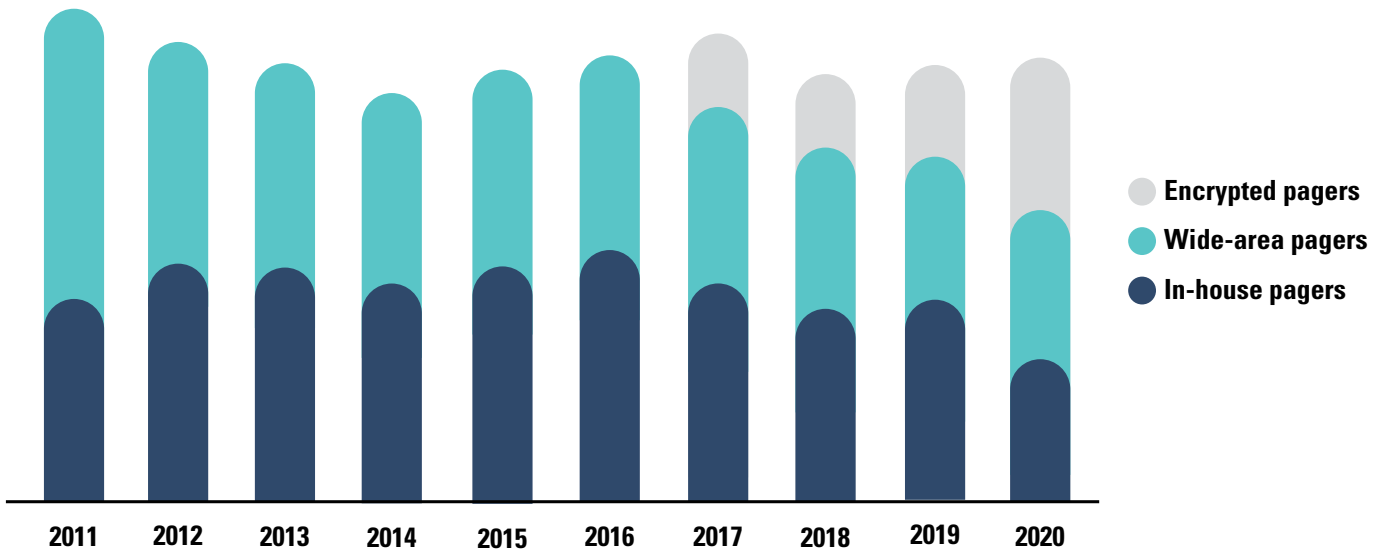
What we learned

What types of mobile devices does your organization support?

Since 2011, hospitals and health systems have consistently added support for additional devices. Smartphones have remained the No. 1 supported device since 2012. The growth in encrypted pagers (introduced in 2016) is also notable.

Device	2011	2020
Smartphones 	57%	54%
Wi-Fi phones 	55%	41%
In-house/onsite pagers 	58%	42%
Wide-area pagers 	83%	41%
Encrypted pagers 		43%
Tablets 		41%
Voice badges 		20%
Smartwatches 		19%
Virtual pagers 		13%

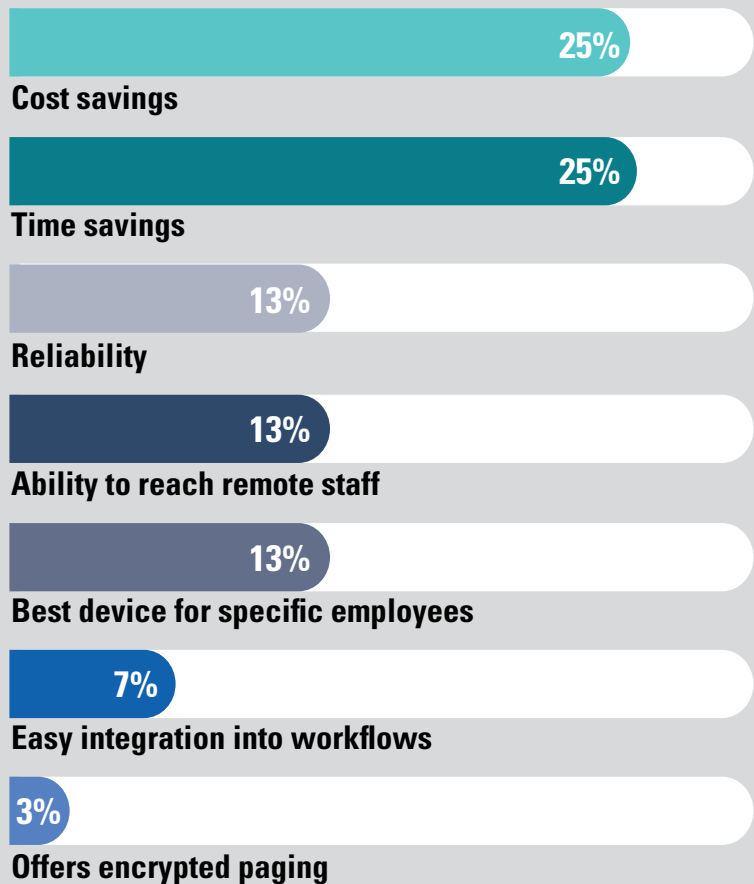
How has the use of pagers changed over time?



The use of pagers in healthcare organizations has remained relatively consistent since 2011.

If your hospital currently uses pagers, select the primary reason they're still maintained.

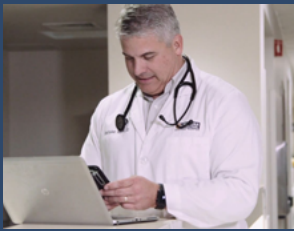
Hospitals and health systems still use pagers, most often because of their cost and time savings.



Current challenges

Communication challenges across hospitals and health systems are well-documented in areas such as infrastructure, data security, compliance, gaps in alerts and notifications, EHR optimization, siloed data and information, inconsistent policies and processes, and reaching the right person at the right time on the right device.

We wanted to know what healthcare leaders see as the biggest obstacles to improving communications and how these challenges might contribute to clinician burnout.



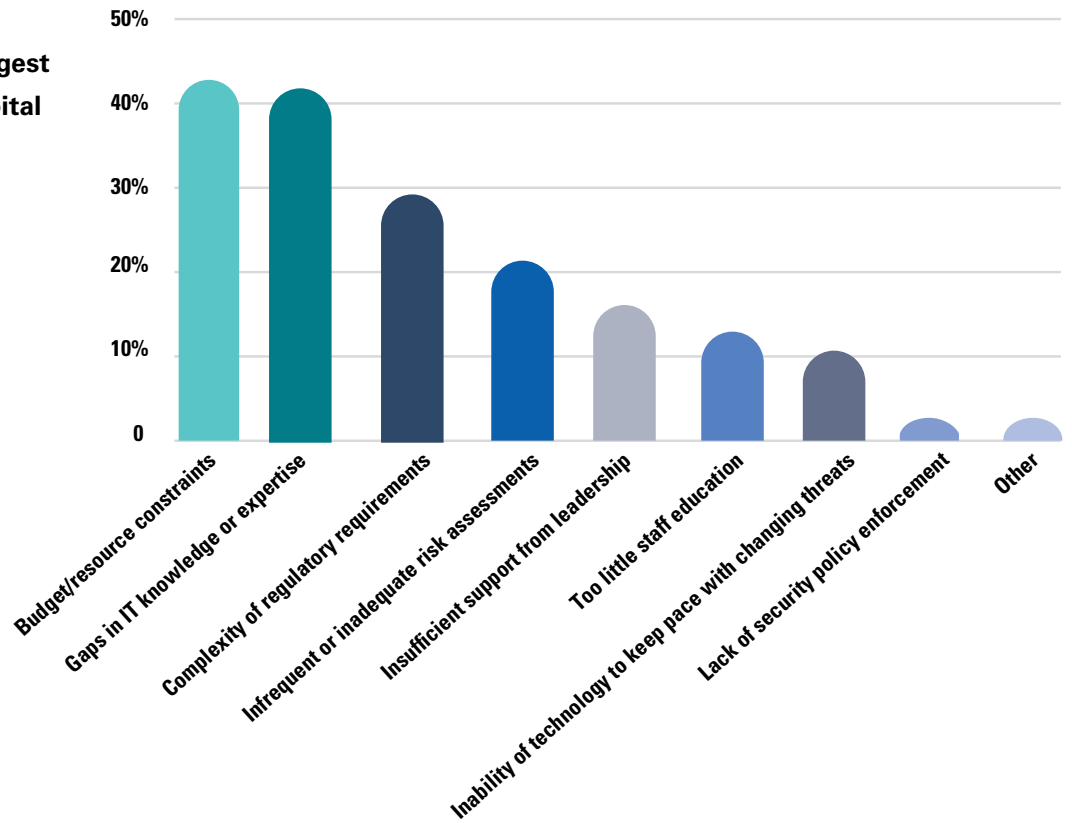
**See how TidalHealth Peninsula Regional
(formerly Peninsula Regional Medical Center)
solved multiple communication challenges
hospital-wide in this video**

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What we learned

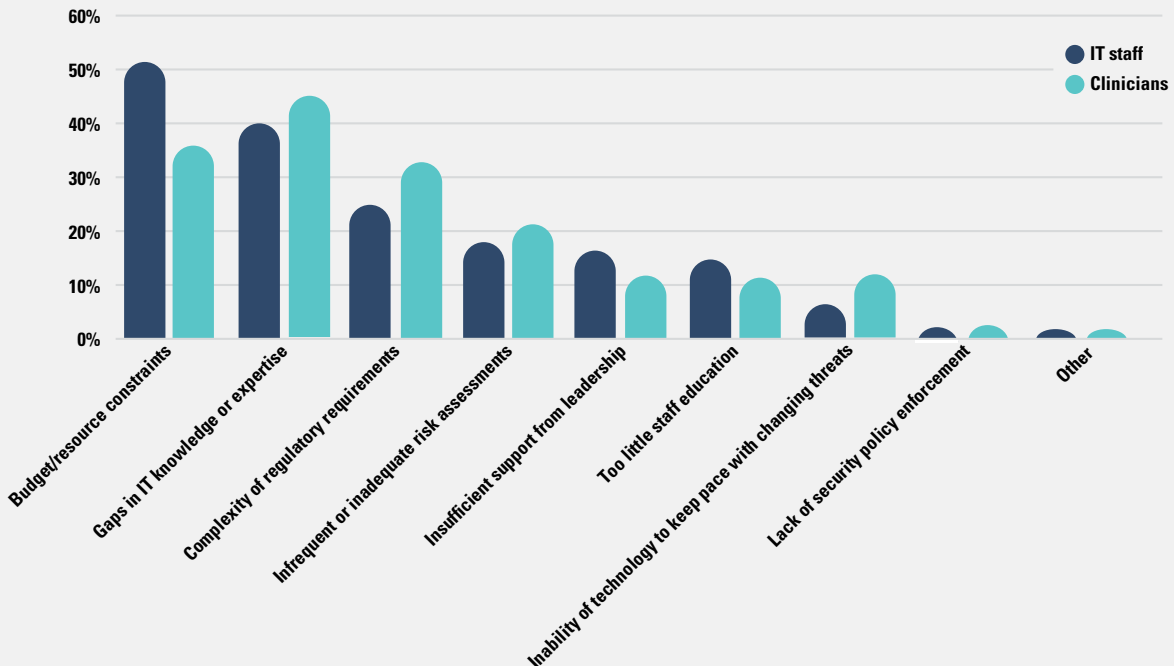
What do you perceive are the biggest obstacles to advancing your hospital communications (select two)?



Budget/resource constraints and gaps in IT knowledge or expertise are the top two obstacles to advancing hospital communications.

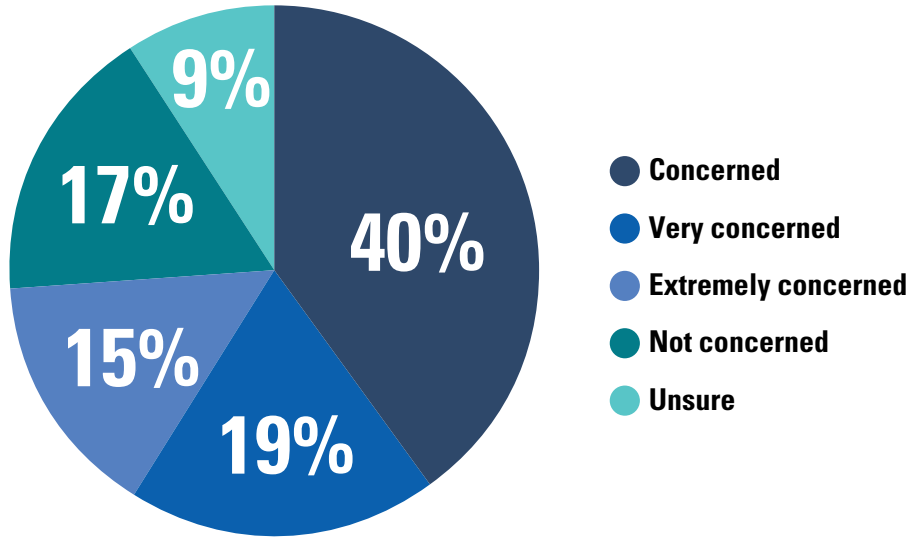
What do you perceive are the biggest obstacles to advancing your hospital communications (select two)?

(IT staff compared to clinicians)



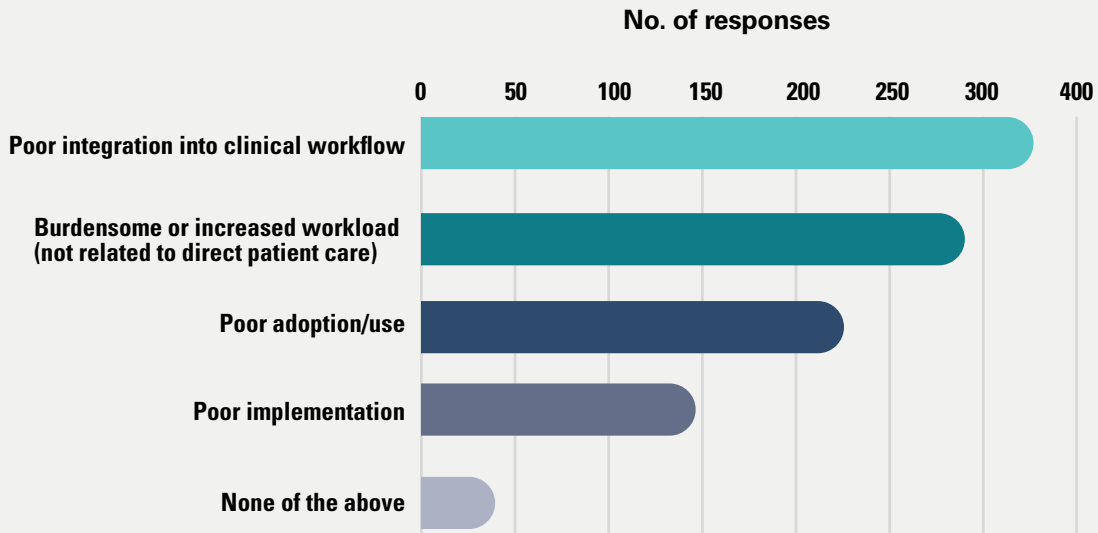
IT staff see budget/resource constraints as an obstacle more often than clinicians. Clinicians find gaps in IT knowledge and expertise to be an obstacle more often than IT staff.

How concerned are you that patient information and proprietary health system data are being communicated via unsecure or personal communication tools (e.g., consumer texting app, personal email)?



82% of healthcare professionals surveyed have some level of concern that patient information and proprietary health system data are being communicated via unsecure or personal communication tools. Only 17% are not concerned.

When you consider your experience with clinical tools and technology, do any of the following contribute to the risk of alarm fatigue or clinician burnout? (select all that apply)



Poor integration into clinical workflow is the most common clinical technology contributor to alarm fatigue or clinician burnout (selected by 59% of survey respondents).

COVID-19 and healthcare communications

The sudden onset of the COVID-19 pandemic created an immediate need for hospitals and health systems to make rapid changes and adaptations to many existing clinical workflows, policies, and procedures. The need for secure, fast, hospital-wide communications is challenging enough without the added threat of COVID-19 on overburdened hospitals. Additional challenges include sweeping changes to routine care delivery, like using telemedicine and providing virtual care, and having a virtual, remote network of employees.

While healthcare has changed dramatically and will likely never completely return to pre-pandemic “business as usual,” what can we learn about healthcare communications through the response to COVID-19?



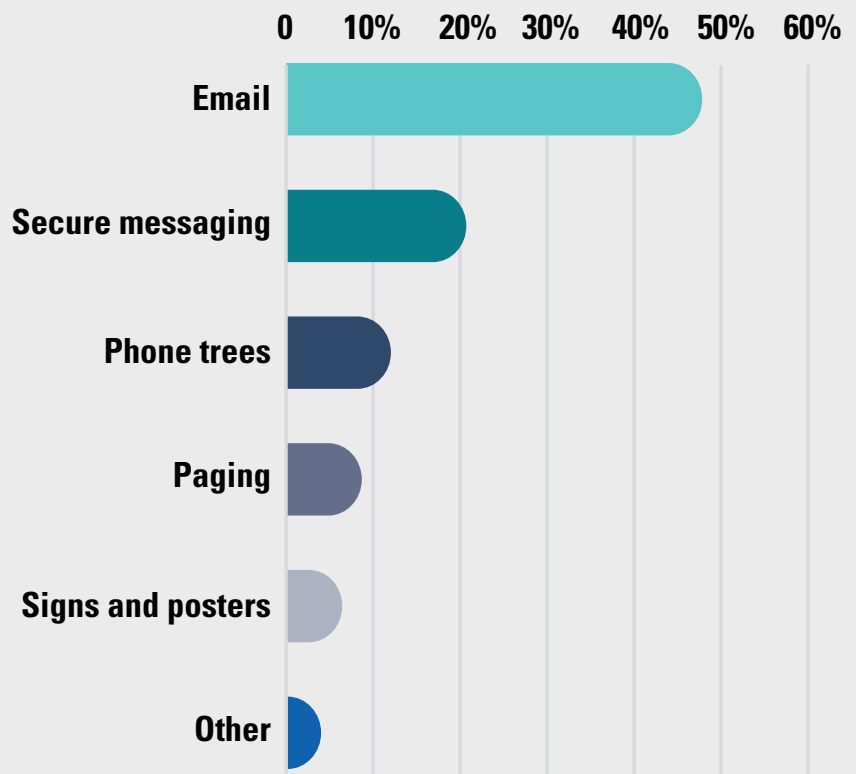
Read how UW Health transitioned to remote workers during the COVID-19 response in this case study

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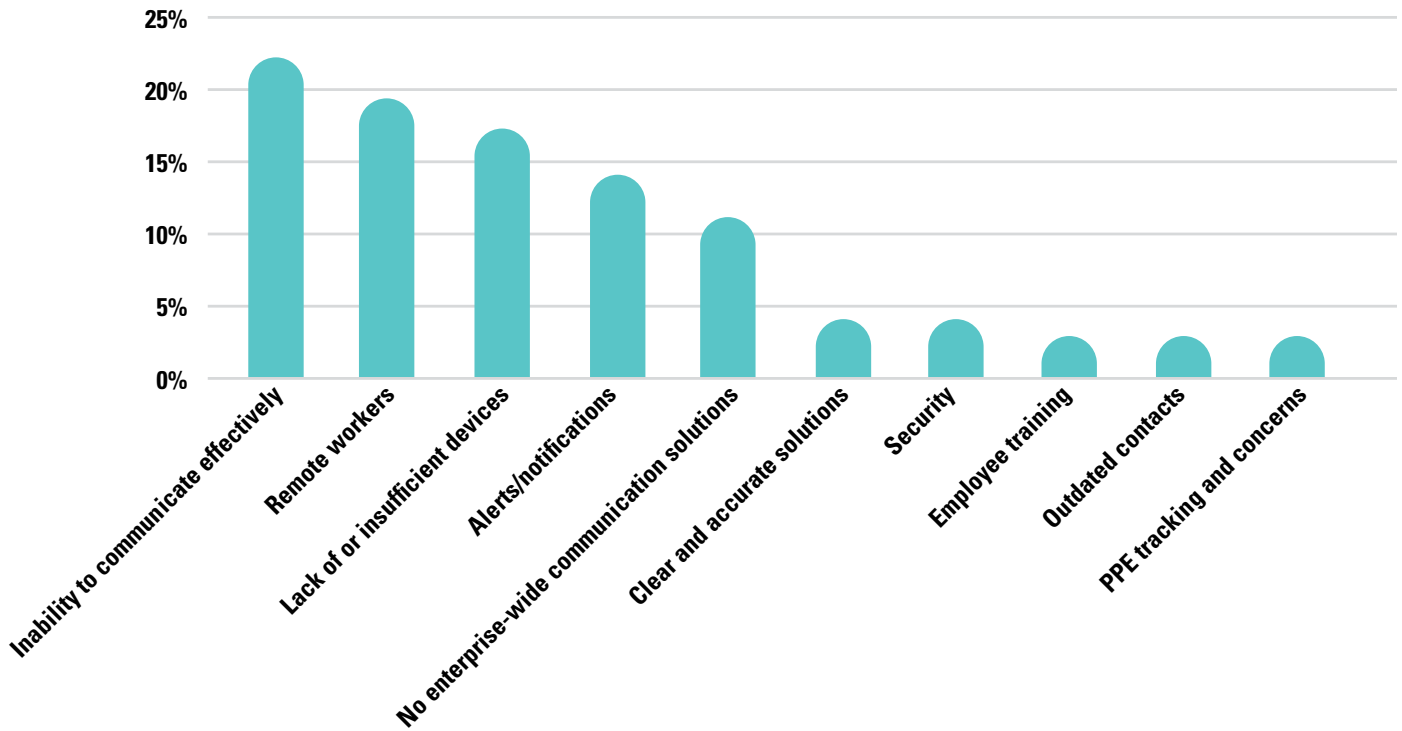
What we learned

What was the most effective form of hospital-wide communication your organization used in response to the COVID-19 pandemic?

Email was the tool used most often by hospitals and health systems to communicate hospital-wide during the response to COVID-19. Of those who answered “other,” the most common response was for various forms of virtual conferencing.



What, if any, hospital-wide communication gaps did your organization discover during the COVID-19 pandemic? (Open-ended question)



Of respondents who reported experiencing a communication gap during the COVID-19 response, responses fell into several categories. The inability to communicate effectively was the most common response. This category included responses such as:

- “Miscommunication/delayed communication among healthcare providers”
- “There are a lot of people and communication and data is not accurate”
- “Poor communication from leadership to frontline staff”



The role of cloud technology

It's no longer a question of "if" hospitals and health systems should fully embrace cloud technology, but when. Market forces in healthcare will all but mandate greater use of the cloud to achieve critical enterprise goals including security, availability, and the ability to scale.

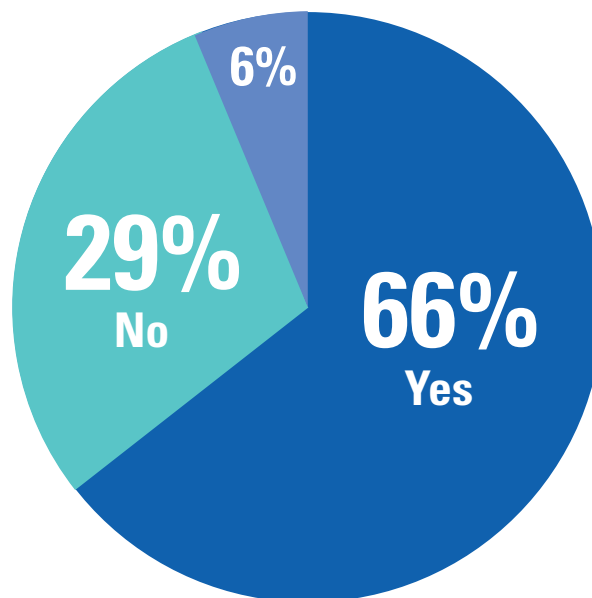
However, healthcare leaders remain somewhat skeptical about moving to cloud technology. [Research](#) shows the shift to the cloud is a priority, but the transition is happening slowly. The main concerns include compliance, security, and privacy.



Read the eBook: Why the future of healthcare is in the cloud

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Would your organization consider moving to a cloud contact center (operator services)?

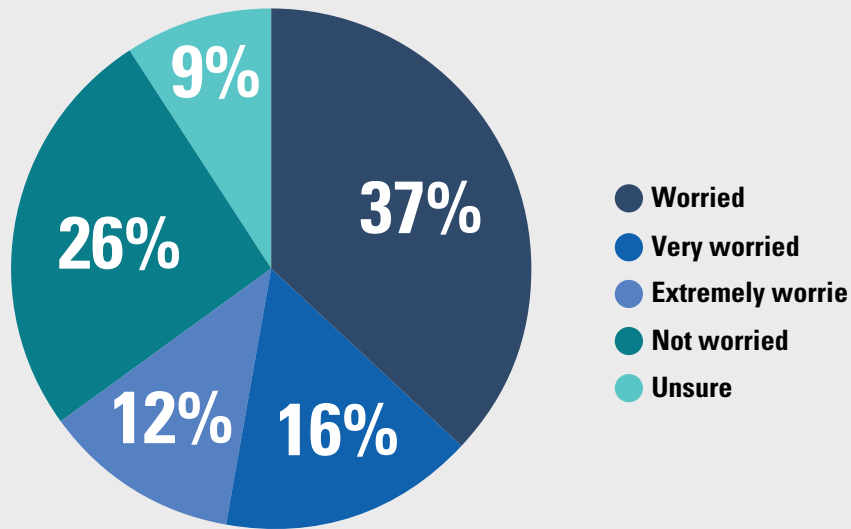


● **Yes** ● **No** ● **Yes, but not all technology**

Approximately 66% of surveyed healthcare professionals would move to cloud contact center technology. Those who responded "Yes, but not all technology," often said they would be concerned about alarms and codes moving to the cloud.

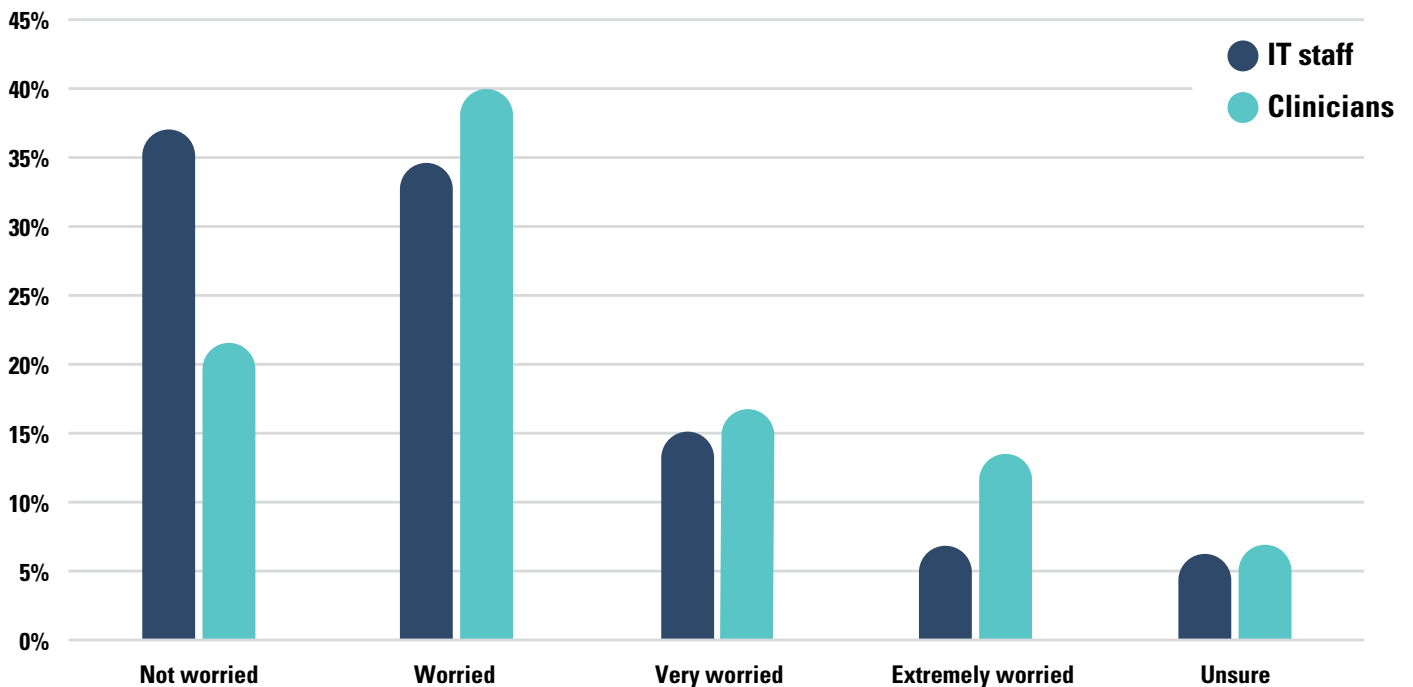
What we learned

How worried are you about moving applications to the cloud?



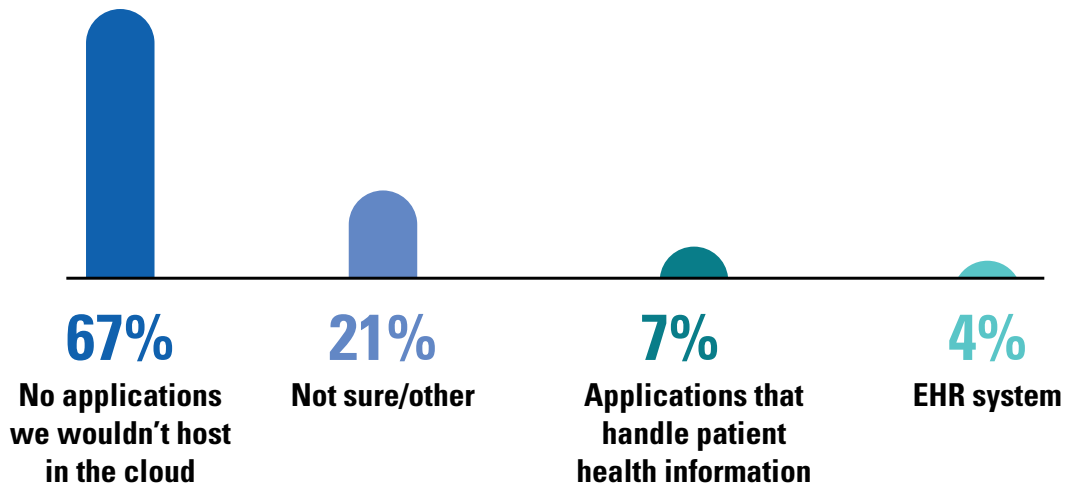
Nearly two-thirds of surveyed healthcare professionals are worried about moving applications to the cloud.

How worried are you about moving applications to the cloud? (IT staff compared to clinicians)



IT staff working in hospitals or health systems are less worried about moving applications to the cloud than physicians, nurses, or other clinicians.

Are there any applications you wouldn't host in the cloud?



Though healthcare professionals are worried about moving applications to the cloud, the vast majority (67%) reported no specific applications they wouldn't host in the cloud.



Additional findings

Onboarding

When transitioning to new communication technologies and processes, the majority of healthcare professionals reported their organizations are “somewhat effective” at many onboarding and implementation tasks, including:

- Onboarding end users
- Educating end users
- Asking input/feedback from end users
- Notifying end users of IT updates/impacts to workflows
- Identifying when users have stopped using the technologies or processes

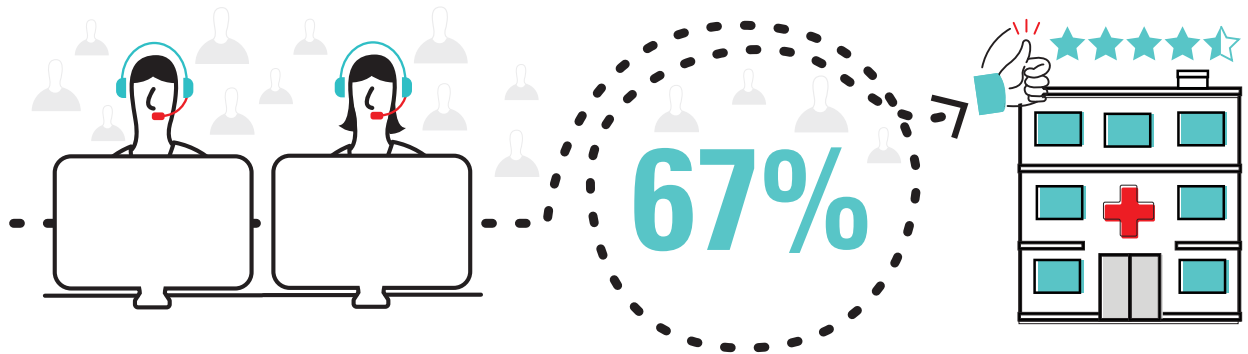
Communication technology

Nearly 67% of healthcare professionals report they are satisfied with the current clinical communication methods. Yet, 15% report being either “dissatisfied” or “very dissatisfied.”

The most common hospital systems that staff can access with mobile devices are the directory for staff and contact information (55%) and the directory for affiliated providers and other team members (51%).

The least common hospital system staff can access with mobile devices is critical test results (30%).

58% of healthcare professionals don’t feel there are too many communication tools at their organization, while 36% are unsure. Of the 6% who believe there are too many tools, the average number of tools at their organization is 6.



Nearly 67% of healthcare professionals believe their organization’s contact center (operator services) proactively contributes to the patient journey and patient experience “considerably” or “a great deal.”

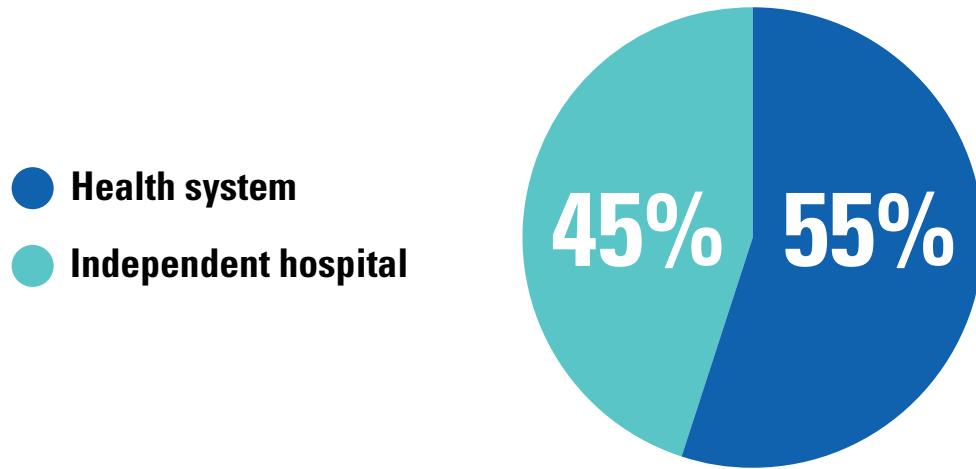


See how VCU Health established effective clinical communications

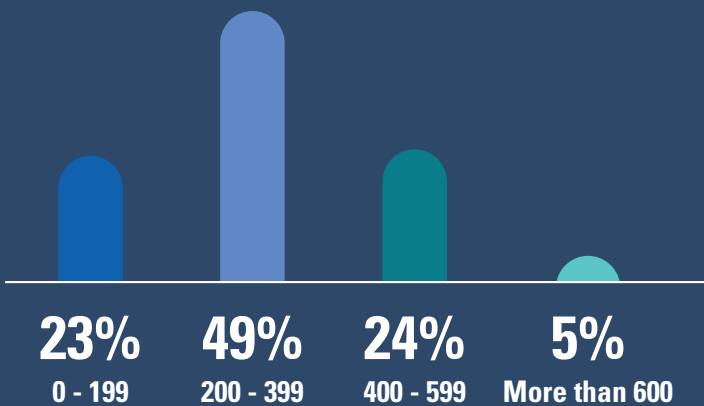
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Survey demographics

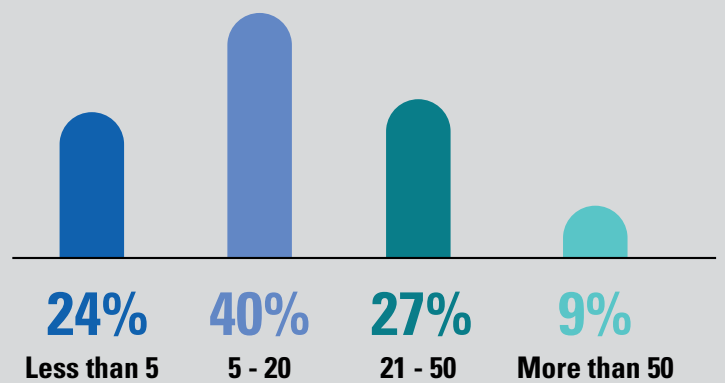
Organization type:



Average bed size:

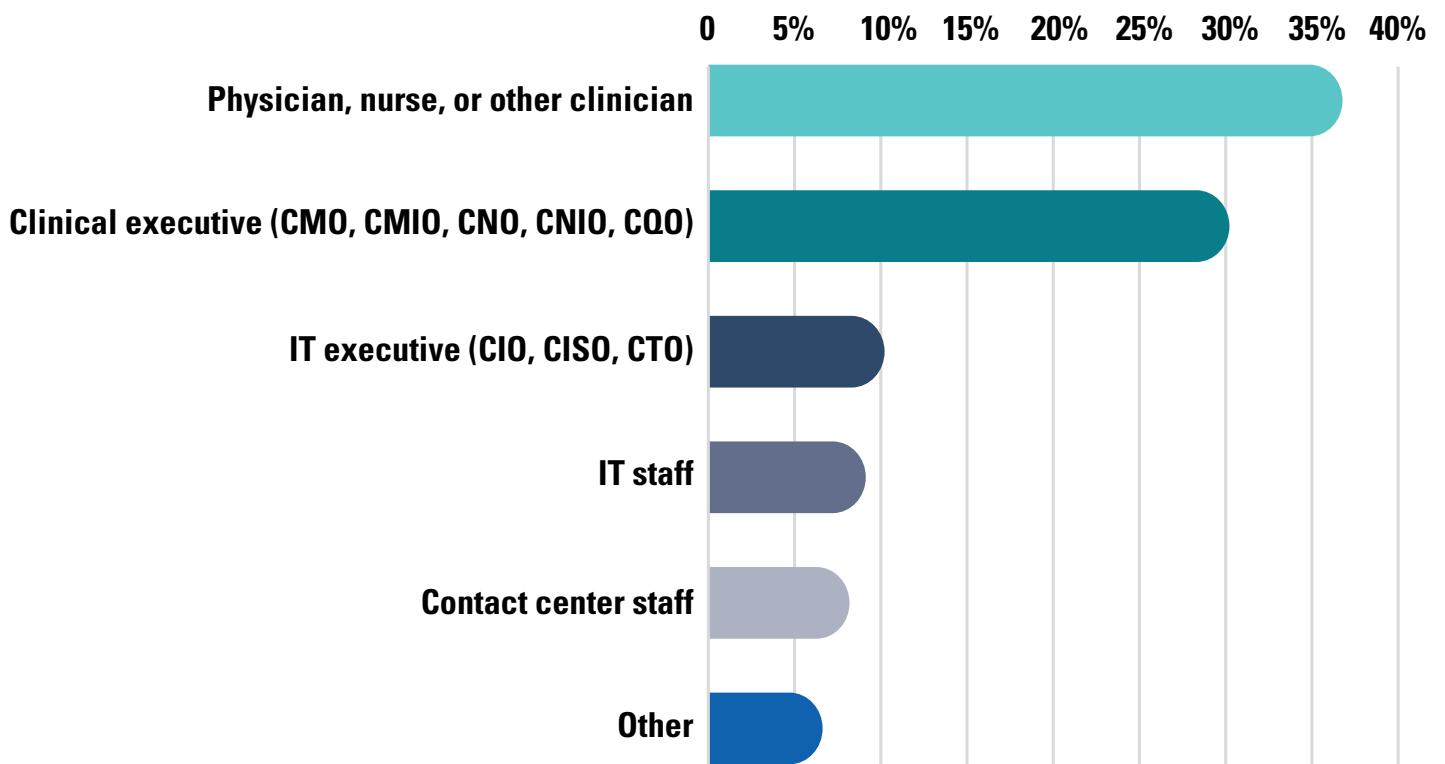


Number of hospitals in health system:





Title in organization:



Conclusion

Thank you to all 659 healthcare professionals who provided their time and expertise to contribute to the first annual survey on the state of healthcare communications.

The data from this survey tells a story of healthcare communications before and during the response to COVID-19. It shows the direction of communication in hospitals and health systems up to the present day and gives insights into upcoming changes.

Our hope is that access to data on the state of healthcare communications will enable you to consider your own communication strategies, today and into the future. While each hospital and health system may consider the data differently, we found three major takeaways:

Enterprise-wide communication is key

No one knows yet how the pandemic will alter healthcare communications. In the short term, with 92% of healthcare professionals supporting enterprise communication technology to improve clinical outcomes, survey results indicate that employing a single platform that solves multiple communication challenges could help. Our survey also indicates that the contact center (operator services) is a critical component of enterprise-wide communication. While niche products like secure texting apps, badges, and scheduling tools can solve for individual communication needs, it's difficult to piece these systems together to create an entire care team collaboration ecosystem. We interpret these results to mean that hospitals and health systems that haven't moved to a platform solution yet, might now be ready to consider such solutions.

Pagers are still relevant

With the addition of encrypted and virtual pagers to the device mix, pagers remain a mainstay in healthcare communications. The use of pagers has remained relatively consistent since 2011 and was in the top four devices used in response to the COVID-19 pandemic. Pagers are reliable, with signals that can penetrate through concrete and steel when a smartphone signal might not. Because they're powered by batteries, they're dependable during a power outage and don't rely on Wi-Fi or cellular networks. Survey respondents seem to agree that there simply isn't

a communication device that provides more cost or time savings.

Cloud technology has arrived

While healthcare professionals as a whole are worried about moving technology to the cloud, our survey shows that IT staff are less worried than clinicians. These results indicate that more can be done to prove to clinicians the reliability and security of cloud solutions. Yet, all survey respondents agreed—budget and resource constraints are the biggest obstacles in advancing hospital communications.

If COVID-19 has taught us anything, it's that speeding delivery of patient care is critical. One of the most efficient ways to achieve that is to connect caregivers with the people and information they need, when they need it. We firmly believe enhancing healthcare communication technology is one path to improve care team collaboration and provide the best care to each patient.

If you have a question about something you read or would like to learn more about how Spok can help advance your care communications and collaboration, please [contact us](#).



ABOUT SPOK, INC.

Spok, Inc., a wholly owned subsidiary of Spok Holdings, Inc. (NASDAQ: SPOK), headquartered in Springfield, Virginia, is proud to be a global leader in healthcare communications. We deliver clinical information to care teams when and where it matters most to improve patient outcomes. Top hospitals rely on the Spok Care Connect® and Spok Go® platforms to enhance workflows for clinicians, support administrative compliance, and provide a better experience for patients. Our customers send over 100 million messages each month through their Spok® solutions. Spok is making care collaboration easier.

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