

2023 REPORT

The State of Healthcare Communications



Executive summary and key takeaways

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As Spok embarks on the latest iteration of our survey in 2023, we reflect on how healthcare communication has evolved since our inaugural study in 2011. A decade ago, the conversation was dominated by individual device considerations. Today, healthcare leaders are focused on holistic, enterprise-wide solutions that transcend the confines of device-driven strategies.

This 2023 report details the current state of healthcare communication, navigating through the latest innovations, challenges, and strategies that define the industry. Our investigation covers an era of progress, where the intersection of technology, collaboration, and patient-centricity is shaping the future of healthcare communications.

To create this report, we surveyed healthcare professionals through the second quarter of 2023. More than 150 executives, physicians, nurses, IT personnel, contact center representatives, and more from around the U.S. responded. This data provides ongoing insight into the challenges facing our nation's health systems and the importance of communication technology for providing excellent patient care.

Although every organization will consider the data that follows differently, we've identified three major takeaways:



Unified Communication is Essential for Modern Healthcare

Findings: Roughly 90% of respondents indicate they use a clinical communication and collaboration platform. Healthcare leaders want a unified communication platform that integrates features such as secure messaging (75%), on-call scheduling (61%), clinical alerting (56%), and mass communications (56%).

Implication: A centralized approach, rather than a siloed one, is pivotal for improving hospital communications. This streamlines workflows and reduces clinician burnout by making access to clinical information more efficient.

2 Addressing Burnout is Imperative

Findings: A concerning 76% of healthcare professionals experience burnout symptoms. However, we see a positive shift, with 66% noting that their organizations are trying to tackle work-related stress and burnout.

Implication: While the healthcare industry acknowledges burnout as a significant issue, more proactive measures are essential. Support from leadership, better pay, and improved work hours, combined with technological solutions like enhanced EHR usability and mobile technologies, can be pivotal in addressing this challenge.

3 Diversity in Communication Devices Remains Relevant

Findings: Healthcare institutions consistently depend on diverse communication devices, including smartphones and Wi-Fi phones. While traditional pagers see reduced usage, emerging technologies like encrypted and virtual pagers are gaining traction.

Implication: The healthcare sector recognizes the importance of versatile communication tools. Adapting to new technologies while retaining crucial existing devices ensures efficient communication across all roles, which ultimately benefits patient care.



Current communication challenges

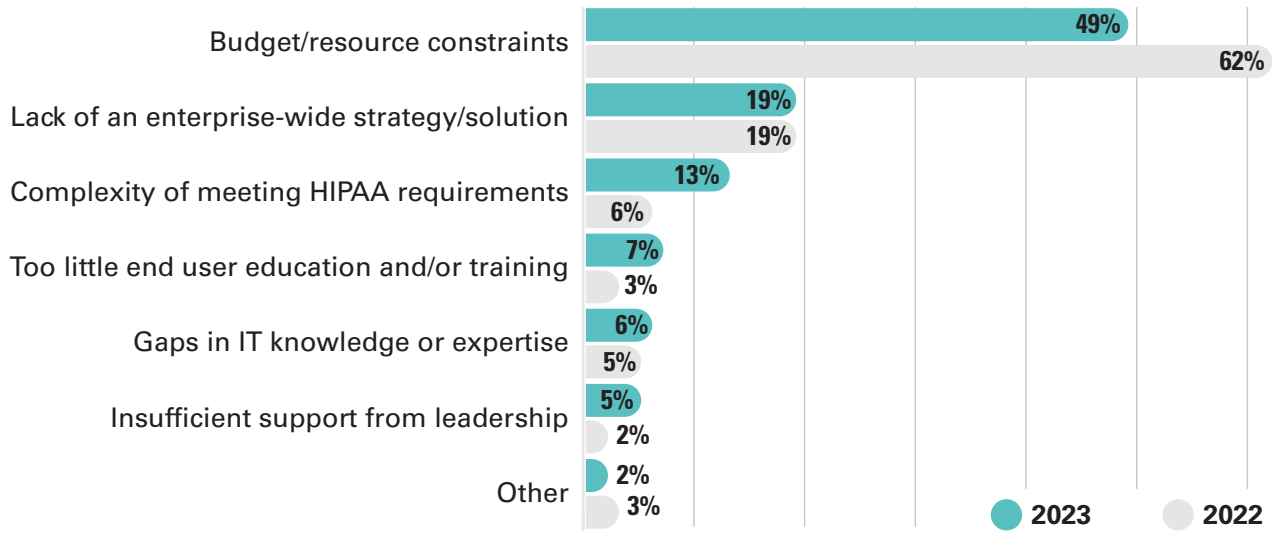
Our initial exploration in 2011 revolved around mobility strategies as healthcare organizations cautiously integrated smartphones and other Wi-Fi-enabled devices into their clinical practices. The pivotal question then centered on whether to authorize access to clinical systems through personal devices.

Fast forward to the present, and smartphones have seamlessly woven themselves into the fabric of healthcare, akin to the ubiquitous nature of email. What was once a groundbreaking advancement has now become an expected norm. In addition, the concept of consistent Wi-Fi coverage has shifted from being an aspiration to an absolute necessity, forming the backbone of efficient healthcare operations.

Today, challenges center around leveraging enterprise solutions to ensure seamless care team communication while protecting patient privacy. There is also a growing awareness of the need for training and education in the healthcare sector.



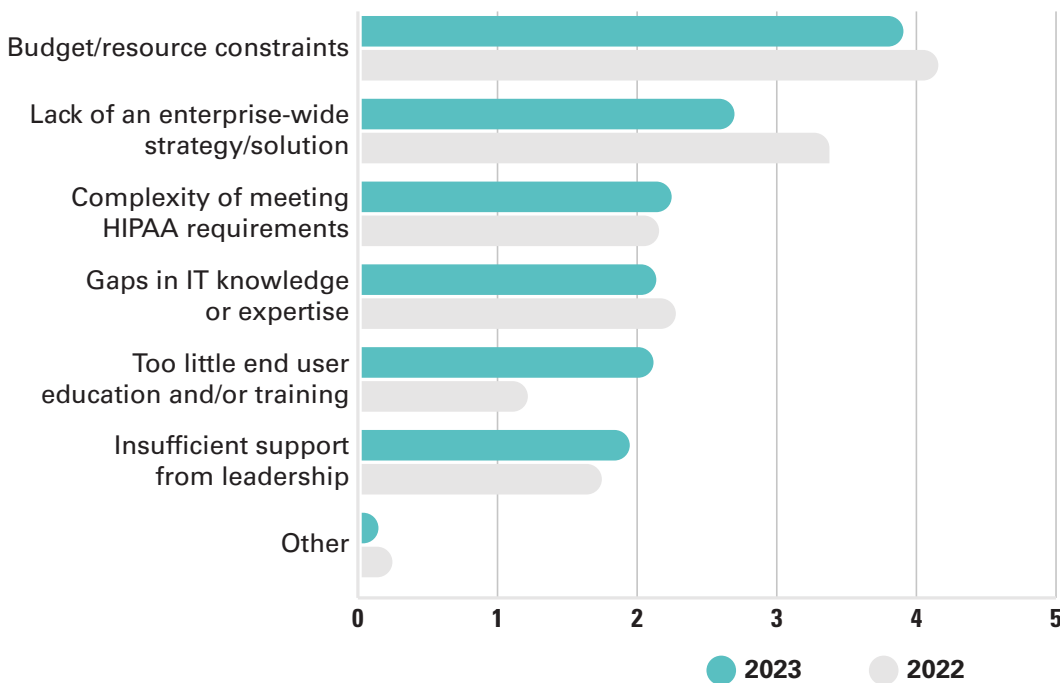
What do you perceive are the biggest obstacles to advancing your hospital communications?



Budget and resource constraints remain the biggest challenge

While budget and resources remain the most pressing concerns in hospital communications, the emphasis on user education has notably increased from 3% to 7%.

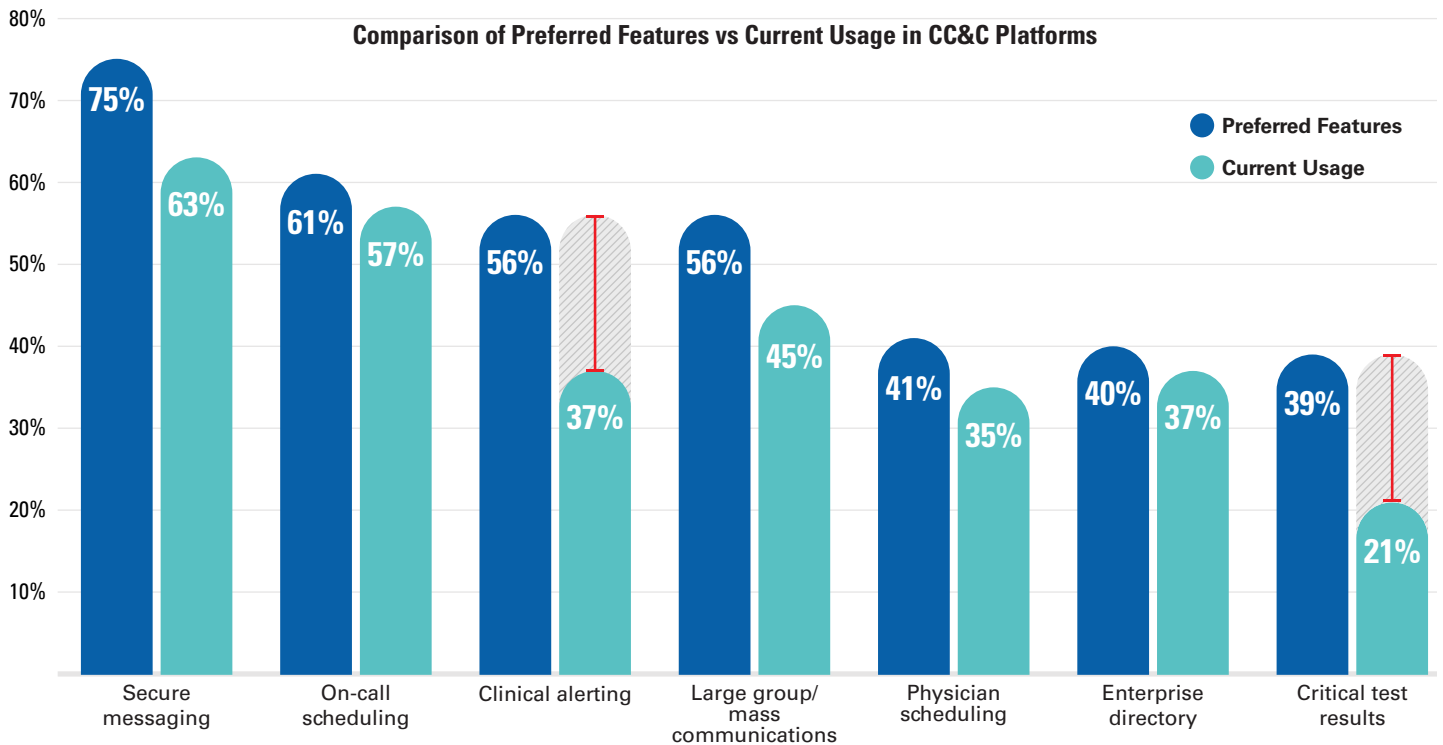
Weighted average for all responses



When considering all responses, budget/resources remained the top concern but the concern about the complexity of meeting HIPAA requirements only increased marginally. As noted above, too little user education saw a significant rise in importance.

What features or solutions must a clinical communication and collaboration platform have to streamline vendors and move toward one unified solution? (Select all that apply)

What features or solutions does your organization currently use? (Select all that apply)



Roughly 90% of survey respondents indicate that they have a CC&C platform. Based on those respondents, the highest priority feature is **“Secure messaging,”** with 75% indicating its importance. This suggests that secure communication among care team members is paramount for clinical collaboration platforms. The second most popular feature is **“On-call scheduling,”** with 61% of respondents highlighting its importance, reinforcing the need for effective scheduling systems in clinical settings.

Analyzing the gaps

We see some gaps when we compare respondents’ preferred features with those they currently use. For example, there’s a significant gap between the preference for clinical alerting (around 56%) and its current adoption (about 37%) and critical test results reporting (39% preference vs 21% adoption). This suggests that while many see the value of these essential clinical functions, not as many organizations have successfully integrated or utilized these features.

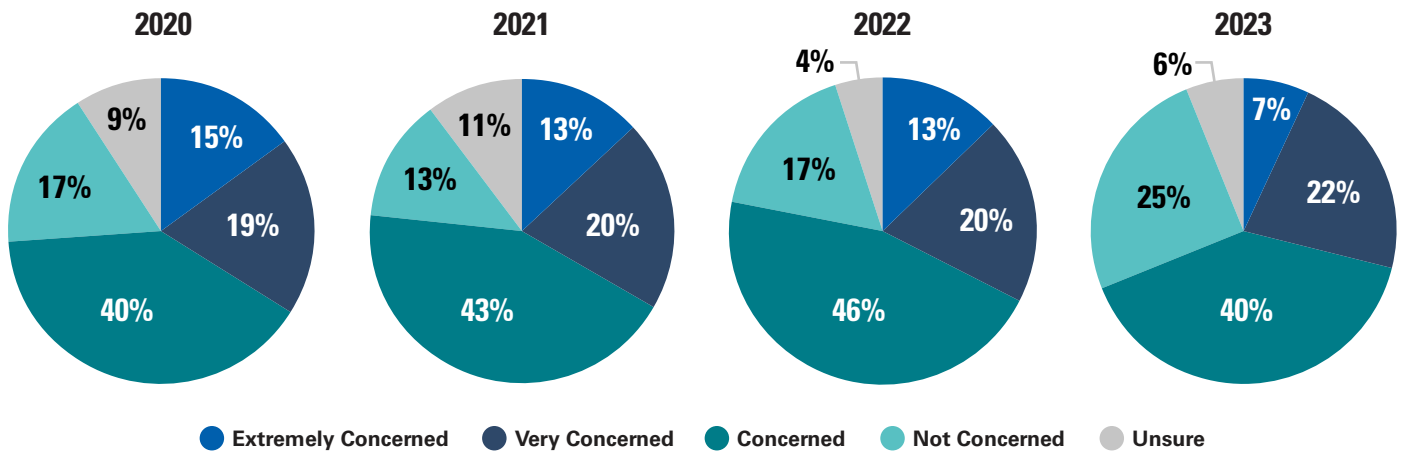
By addressing these gaps, health systems can better tailor their platforms to meet the needs of their clinicians and staff and further streamline clinical communications.

75% of healthcare leaders say secure messaging is the *key component* of a CC&C platform

Clinical alerting and reporting critical test results are two areas of opportunity in today’s healthcare



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)?

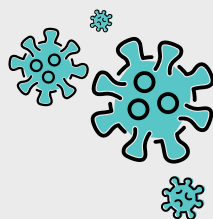


69% of respondents express *some level of concern* that PHI is being shared via insecure tools

The data from 2020 to 2023 reveals evolving concerns about the security of patient information and proprietary health system data communicated through potentially unsecure tools. “Extremely concerned” respondents have consistently decreased from 15% in 2020 to around 7% in 2023. Surprisingly, the “Not concerned” group has been on the rise, especially in the past two years, suggesting perhaps a growing trust in communication tools.

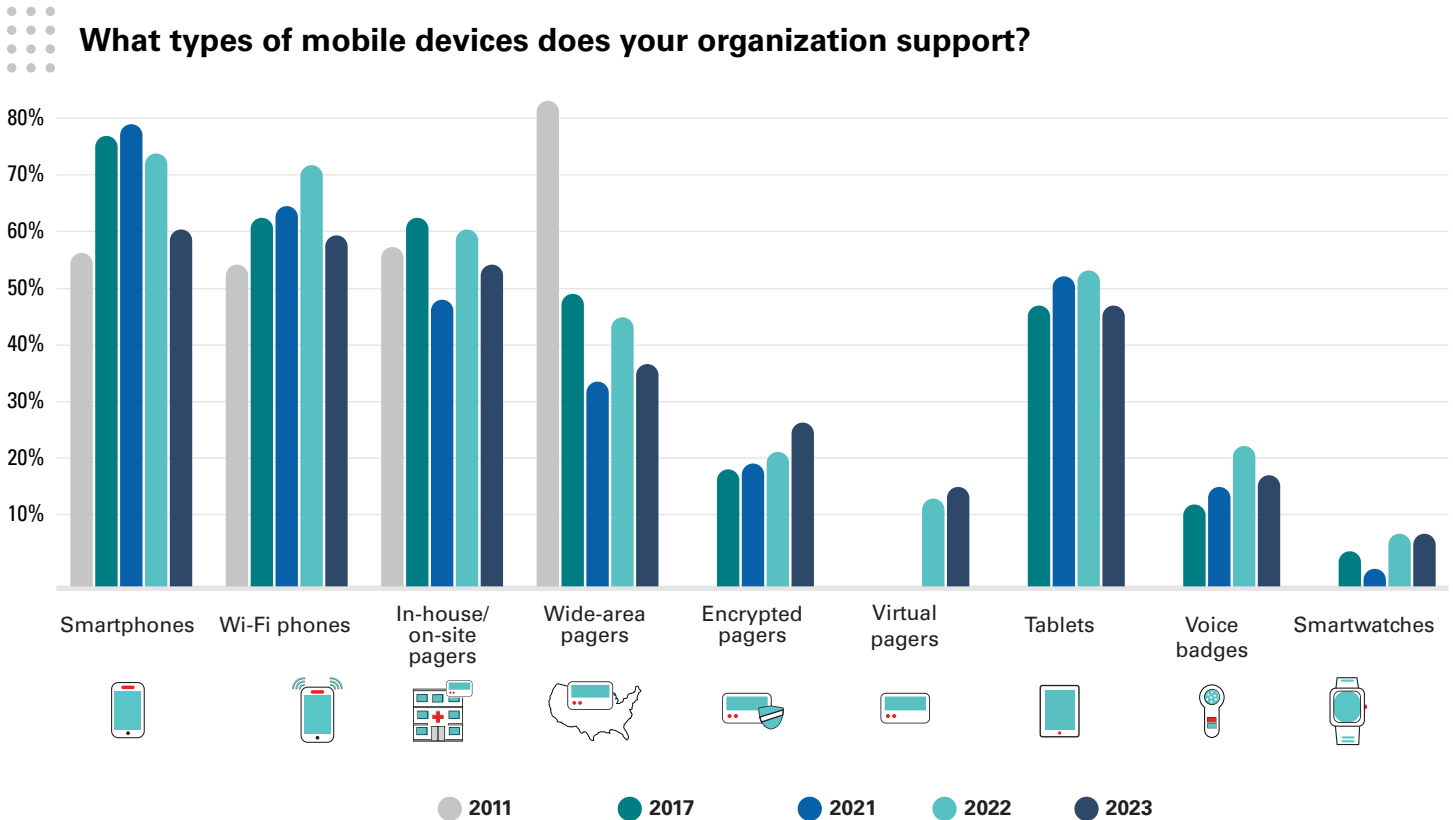
The potential impact of COVID-19:

We first asked this question in 2020, when the COVID-19 pandemic was just beginning and health systems were turning to new technology to help meet the growing demands of this worldwide crisis. The following factors might contribute to the shift in concerns since then.



- 1 Digital transformation:** The urgency of the pandemic propelled a swift digital shift in healthcare, potentially leading to initial heightened concerns due to hasty implementations. However, as systems improved and matured, concerns might have decreased.
- 2 Telehealth surge:** While initially a cause for concern due to unfamiliarity, the rise in telehealth likely saw increased trust as platforms enhanced their security measures and users became more accustomed to them.
- 3 Tech familiarity:** The pandemic accelerated the public’s exposure to digital solutions, fostering a more tech-savvy populace. This increased comfort with technology could be a factor in the decreasing trend of those “**Extremely concerned.**”

The evolution of mobile devices



The decrease in smartphone usage is intriguing, given the general global trend of increasing smartphone adoption and reliance. The steady rise in encrypted pager use could indicate a return to simpler, more cost-effective communication tools. Overall, the responses emphasize the dynamic nature of device adoption in the healthcare IT landscape.

Why is smartphone use on the decline?

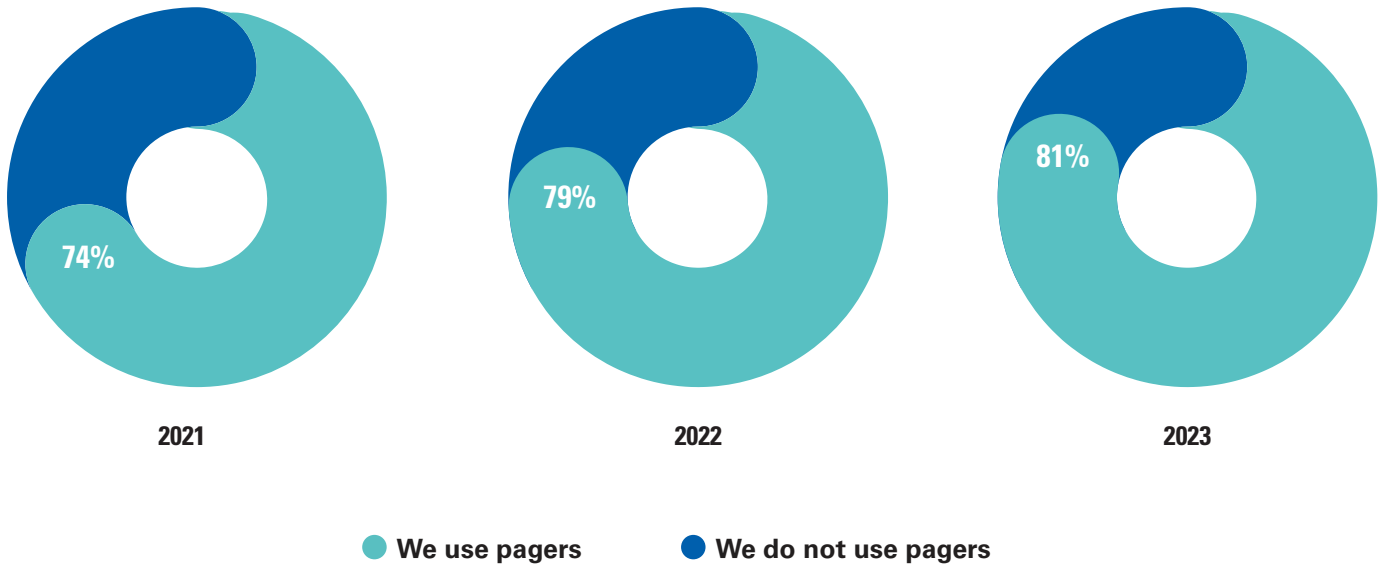
Two factors or interpretations could explain this decrease in the context of healthcare IT:

- Security concerns:** Smartphones, being multifunctional, are exposed to a myriad of applications and networks. This might raise concerns about data breaches or malware, especially when handling sensitive patient data. Ensuring that healthcare workers are equipped with HIPAA-compliant, secure messaging applications is paramount.
- Cost implications:** High-end smartphones with the necessary security and functional features for healthcare can be expensive. Organizations might look at more cost-effective communication and data management alternatives, such as paging.



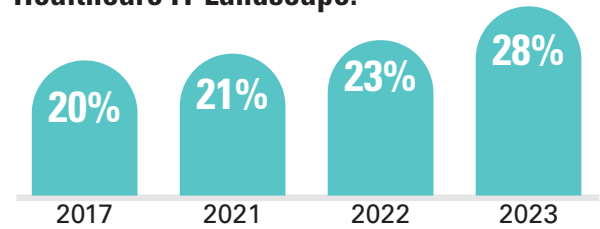
The healthcare IT industry’s needs are continuously evolving, and while smartphones will undoubtedly remain a significant tool, their role might be redefined in the face of emerging technologies and changing operational requirements.

Pager use among survey respondents grew from 74% in 2021 to 81% in 2023, suggesting that a significant majority of hospitals use pagers in 2023.



81% of respondents use pagers for secure hospital communication

Encrypted Pagers in the Healthcare IT Landscape:

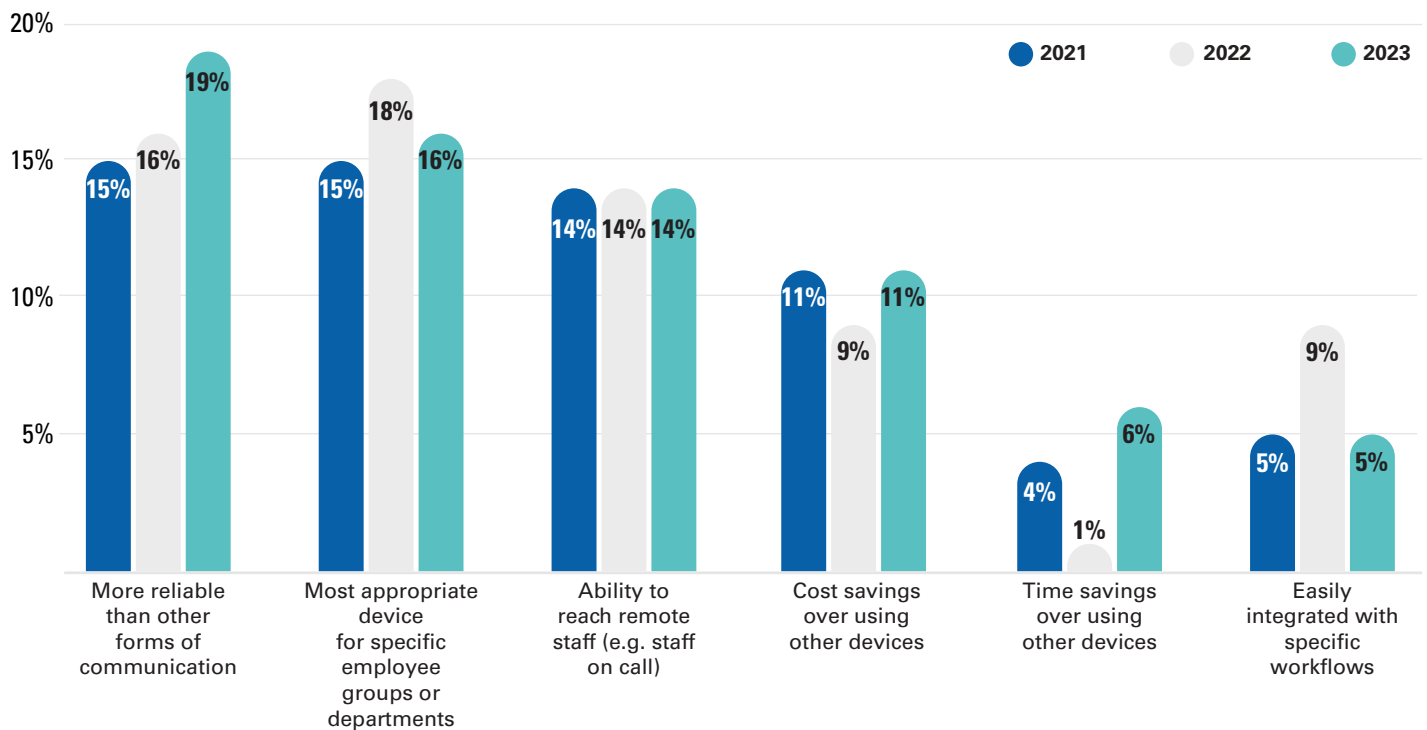


In recent years, encrypted pagers have showcased notable resilience and adaptability. Their growth between 2022 and 2023 underscores an increasing awareness of and demand for secure communication tools in the healthcare sector. Encrypted pagers, by ensuring confidential communication, have cemented their relevance in modern healthcare, catering to the needs of professionals who prioritize efficiency and security.





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



The primary motivator for hospitals to maintain pagers is their reliability over other communication methods. There's also a clear indication that specific roles within hospitals find pagers more appropriate, though this reason saw a slight dip in 2023. Other reasons, such as the ability to reach remote staff and cost savings, also play a role, but their influence has remained relatively consistent over the years. Based on the data, it's clear that the reliability of pagers as a communication tool has increasingly become a significant factor for hospitals.



Pagers are reliable and cost-effective

Clinician burnout and the role of communications

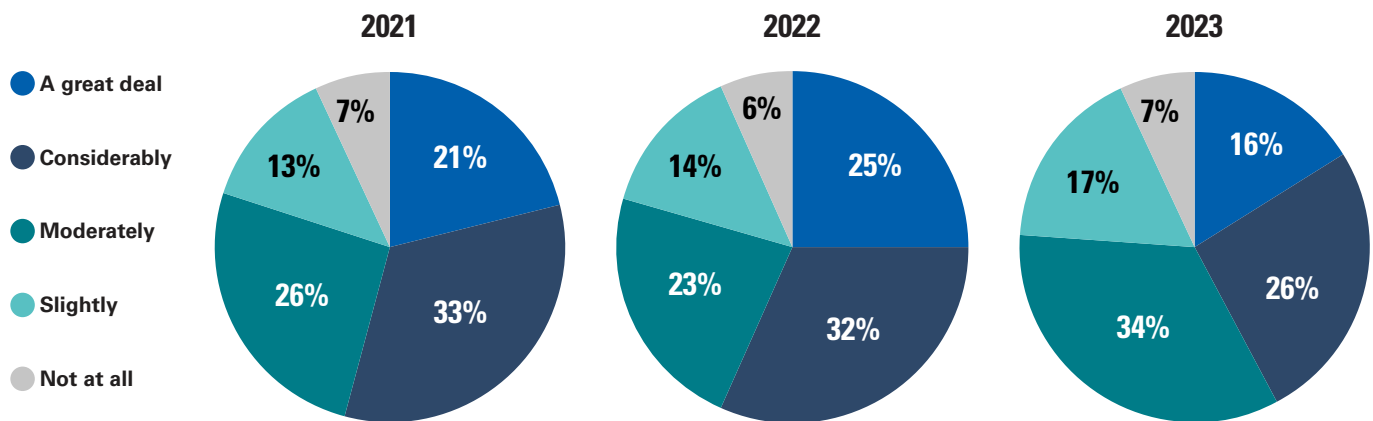
While burnout among medical professionals is not a new phenomenon, 2019 marked a significant turning point when a collaborative report brought the issue into the limelight. That year, a pivotal report from the Harvard T.H. Chan School of Public Health, the Harvard Global Health Institute, the Massachusetts Medical Society, and the Massachusetts Health and Hospital Association identified clinician burnout as a major health crisis, echoing collective concerns about this escalating problem. Their study highlighted not just the prevalence of burnout but also its implications on patient care, clinician well-being, and the broader healthcare system.

The onset of the COVID-19 pandemic in 2020 acted as a catalyst, further straining an already stressed healthcare system and workers. Healthcare professionals were at the forefront, grappling with the dual challenges of managing an unprecedented health crisis and ensuring their own mental well-being. The constant pressure, long hours, and emotional toll of dealing with critically ill patients exacerbated feelings of burnout among many.

42% experience a great deal or considerable amount of burnout

Our current assessment of clinician burnout reveals mixed results.

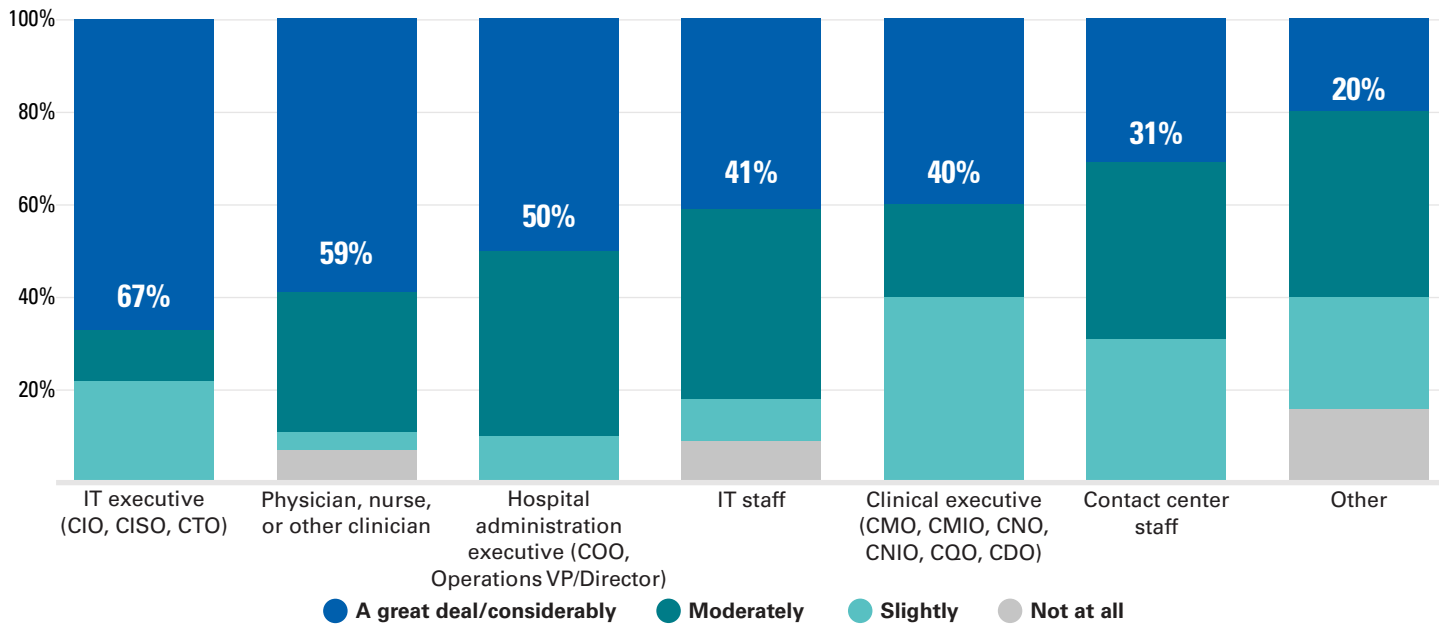
●●●● To what degree have you **personally** experienced feelings of work-related stress and/or lost satisfaction/sense of efficacy that might contribute to burnout in your work?



A concerning 76% of healthcare workers still report some level of burnout, although those who felt a great deal of burnout decreased from 21% to 16% within three years. This decline might indicate improved interventions, better support mechanisms, or perhaps a post-pandemic stabilization. A consistent 7% reported no feelings of burnout over the years, suggesting that a minority managed to maintain resilience or had adequate support systems in place. Yet, the overarching sentiment remains: burnout in the healthcare industry is a pressing issue that can't be ignored.



Personal experiences of burnout by role



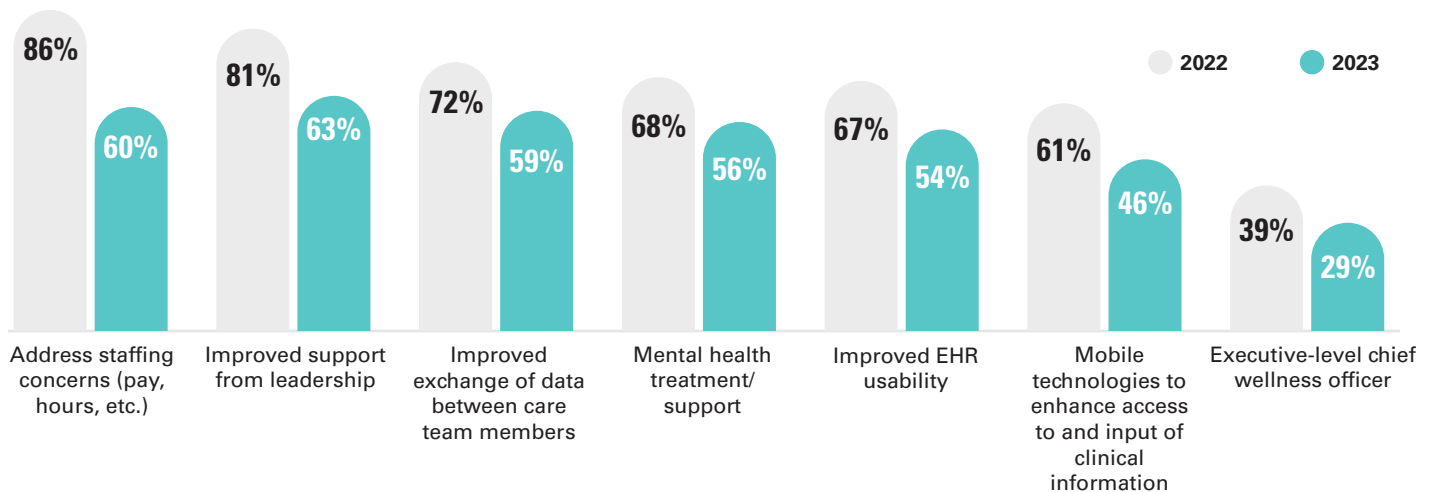
IT executives and clinicians experienced the *highest* level of burnout

When examining responses by role, IT executives emerged as the most affected group in 2023. A striking 67% of them indicated that they experienced factors contributing to burnout **“A great deal”** or **“Considerably.”** Clinicians were not far behind, with 59% signaling high levels of burnout. The data underscores the importance of addressing burnout in the healthcare sector, as it affects every level, from top executives to staff members.



How helpful are recommended strategies for addressing the risk of burnout?

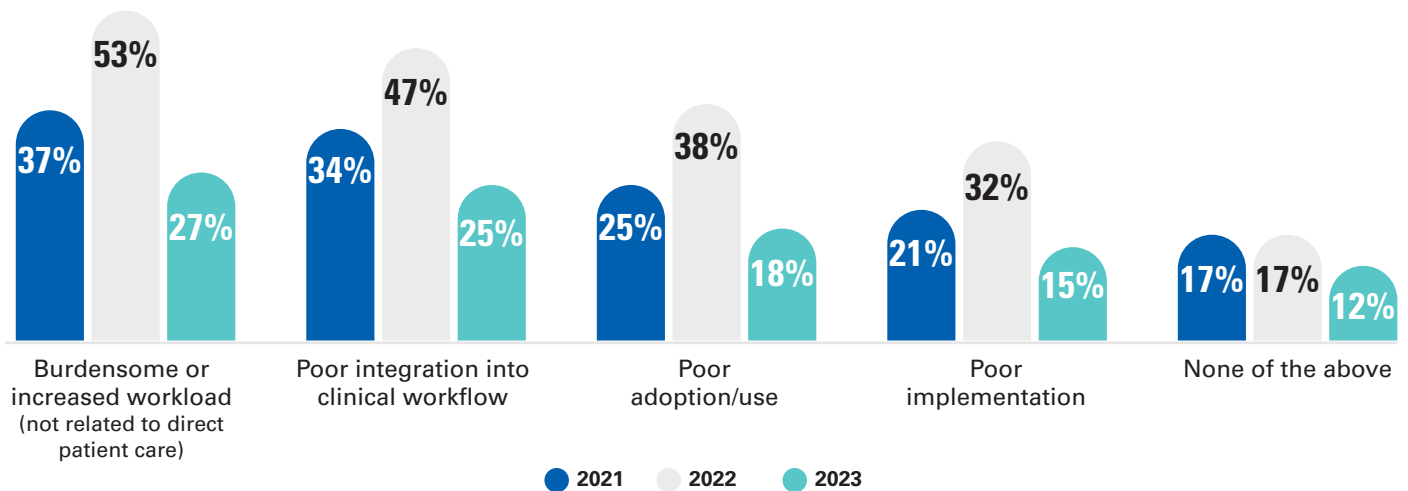
Percent of respondents who identified the below strategies as “extremely” or “very helpful” in addressing the risk of burnout:



Across both years, addressing staffing concerns and improving support from leadership emerged as top strategies to mitigate burnout. While the emphasis on specific solutions decreased from 2022 to 2023, all remain relevant. This suggests a multifaceted approach is necessary, combining institutional changes, technological improvements, and mental health support to effectively tackle burnout.



••• **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)



Overall, while various factors contribute to clinician burnout, the burden of increased workload unrelated to direct patient care consistently stands out as the most significant contributor. The year 2022, in particular, witnessed a heightened sense of these challenges (53%), but there was a decline in 2023 (to 27%), suggesting potential improvements or changes in the clinical environment.

Burnout remains a concern

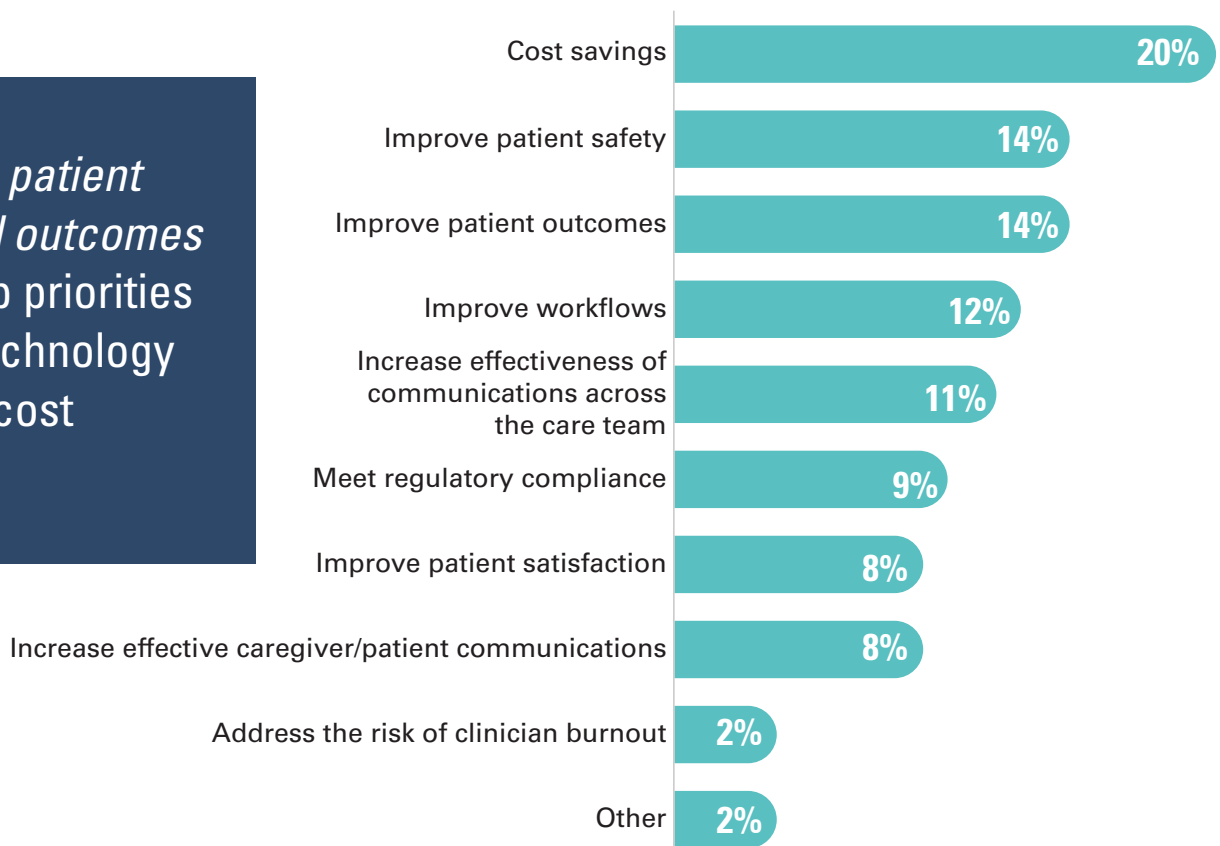
Clinician burnout is not just an individual concern but a systemic one that impacts the entirety of the healthcare system. It affects patient care, healthcare outcomes, and the mental well-being of the very professionals we rely on for our health. As the data and historical trends suggest, while there might be slight improvements, there’s a long way to go to adequately address and mitigate this concern. There’s an evident need for more robust support systems, organizational changes, and a shift in how healthcare professionals are trained and nurtured throughout their careers.

What's next for healthcare organizations

In the rapidly evolving world of healthcare, understanding the motivations, sentiments, and future trajectories surrounding communication technologies is crucial. This section delves deeper into the perspectives of industry professionals, shedding light on their priorities, satisfaction levels, and future expectations. Looking at the primary motivations behind adopting new communication technology, current sentiments about existing solutions, and the anticipated timeline for IT project implementations, we aim to provide insights that can guide healthcare leaders in making informed decisions, ensuring that technological advancements align with organizational objectives and patient care outcomes.

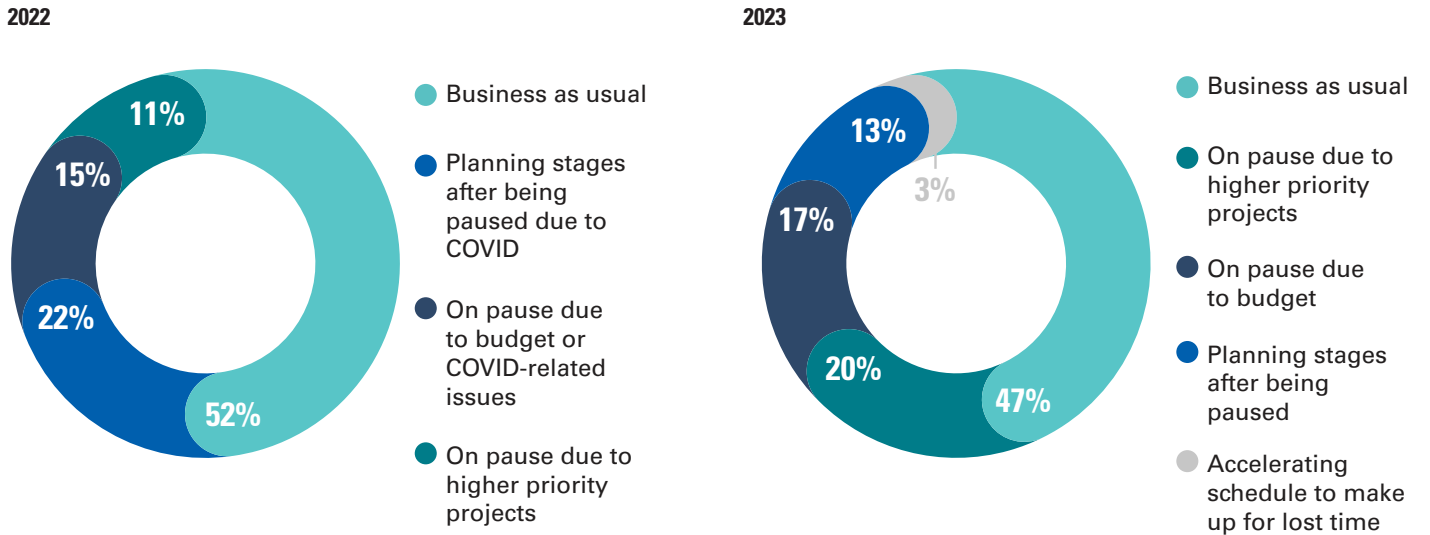
••• **When considering communication technology in your hospital, what is your motivation for new technology?** (Please rank in order from most important to least important)

Improving patient safety and outcomes are the top priorities for new technology following cost savings



“Cost savings” is a primary motivation for many respondents (20%) when considering new communication technology in hospitals. Motivations related to patient care, such as **“Improve patient safety”** (14%) and **“Improve patient outcomes,”** (14%) also rank highly. This indicates that while cost is a concern, ensuring the quality and safety of patient care remains paramount.

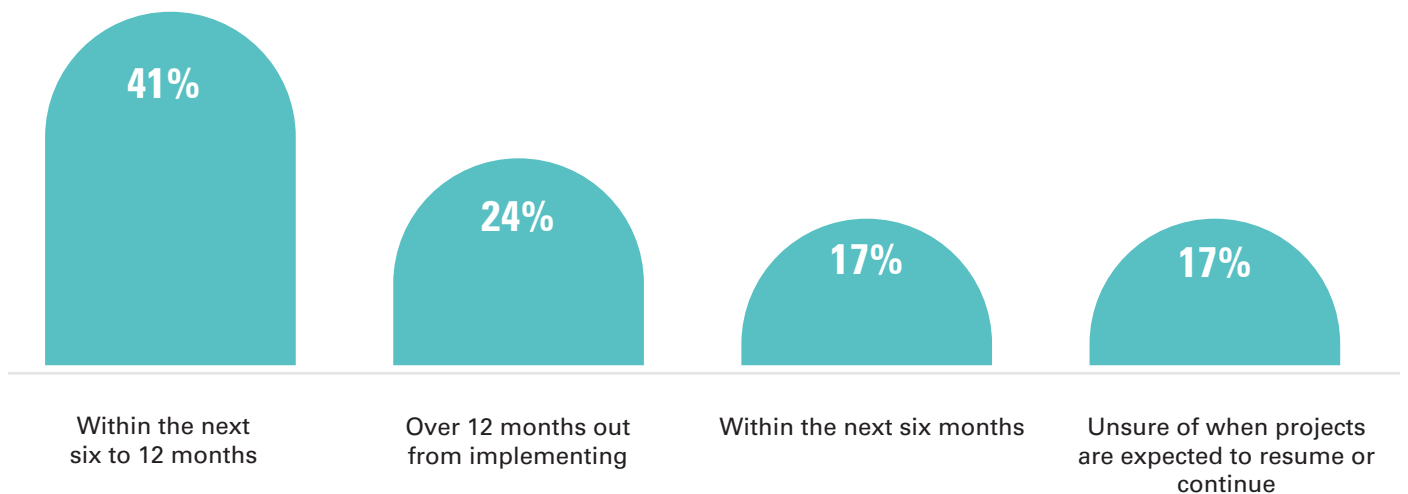
What is the current status of IT communication projects in your hospital/health system?



The slight decline in **“Business as usual”** projects from 2022 (52%) to 2023 (47%) suggests that while most projects continued to run smoothly, a few might have encountered challenges or shifted priorities. The changes in IT project statuses from 2022 to 2023 reflect a combination of financial, strategic, external, and operational factors. These shifts could be the health system’s response to internal and external pressures, aiming to maximize efficiency, compliance, and patient care outcomes.

58% of respondents intend to resume IT projects within the next 12 months

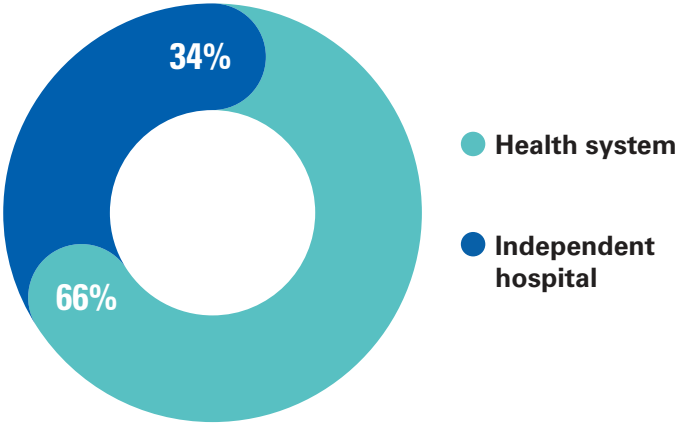
When do you expect to resume or continue implementing these IT communication projects?



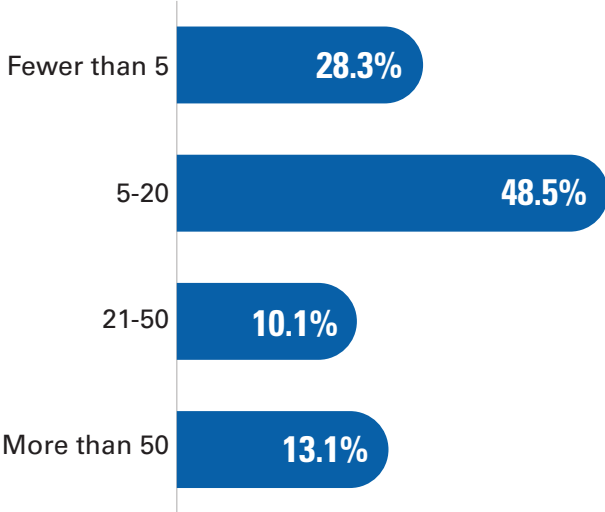
A significant number of the projects (58%) are expected to resume within the next year (combining the 41% expected within six to 12 months and the 17% expected within the next six months). This suggests a collective optimism or plan to get most of these projects back on track relatively soon, recognizing the importance of IT projects to improve healthcare operations and patient care.

Survey demographics

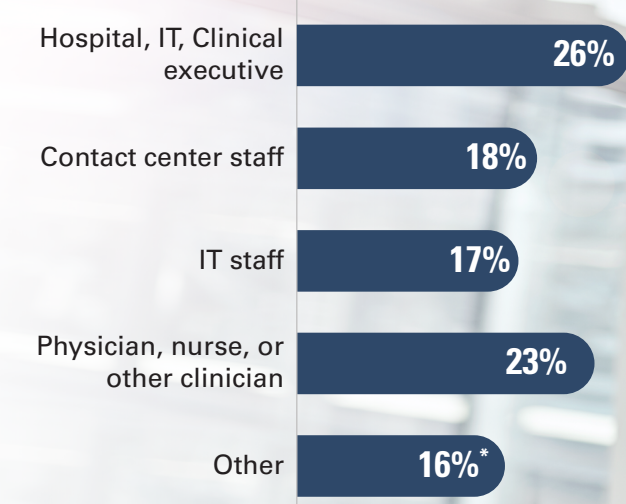
ORGANIZATION TYPE:



NUMBER OF HOSPITALS IN HEALTH SYSTEM:



TITLE IN ORGANIZATION:



*Those who identified as other included business analysts, pharmacists, and roles related to patient services.

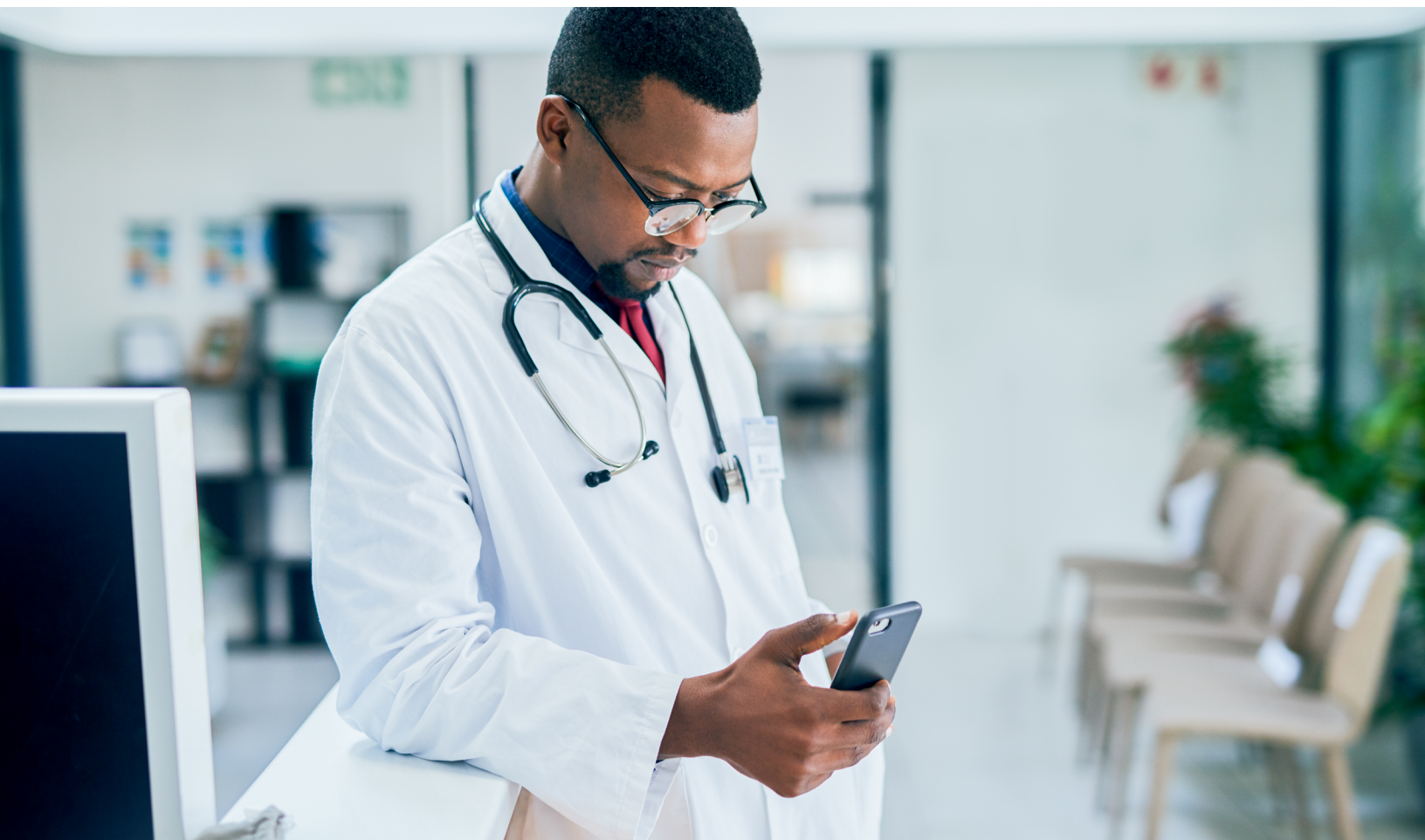


Conclusion

As we reflect upon the insights garnered from this report, a few key themes emerge. The healthcare sector is unmistakably leaning towards unified communication platforms, recognizing their potential to streamline operations and address pressing concerns like clinician burnout. While cost remains a driving factor for many institutions, the unwavering commitment to patient safety, care quality, and outcomes is evident across the board.

The feedback on current communication technologies is largely positive, but it's imperative not to overlook the concerns of the minority. Their insights could be the key to unlocking additional improvements and innovations in the domain. Furthermore, the projections for IT communication projects indicate a sense of urgency and optimism, suggesting a collective move toward harnessing technology for better healthcare delivery and patient care.

As healthcare organizations navigate this dynamic landscape, staying informed, agile, and receptive to change will be pivotal. This report serves as a testament to the evolving nature of healthcare communication – a blend of challenges, opportunities, and the promise of an exciting, more connected future.





ABOUT SPOK, INC.

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