![Acquia logo — Experience Digital Freedom]

Healthcare Today

UNPRECEDENTED UNCERTAINTY, GROWING EXPECTATIONS

INTRODUCTION

It's difficult to overstate the impact of the COVID-19 pandemic. While the human toll remains the most crucial focus, it's important to recognize that a new emotional reality has taken hold, plunging everyone - brands, communities, nations - into a new, digital-first reality.

In the pre-pandemic world, healthcare organizations were already working to respond to consumer expectations for higher quality, more personalized and productive digital experiences. But now, first responders, doctors, nurses, and the entire healthcare ecosystem is pushing its own limits. With all efforts focused on dealing with COVID-19, many other healthcare needs are delayed, or simply going unaddressed. And, as in-person healthcare becomes undesirable or even unavailable, improving digital healthcare solutions and expanding access to them has gained significant urgency. Leading in this environment means accelerating efforts to deliver exceptional customer experiences by tapping into resilience, innovation, and ingenuity.

Let's look at some of the concrete impacts the healthcare industry is currently experiencing, and may face going forward.

Telemedicine Finds Its Moment

While the growth of digitally delivered healthcare services has been underway for some time, it is likely to accelerate significantly both during and in the wake of the pandemic. In addition to its inherent convenience, telemedicine's ability to deliver health services remotely can help prevent infected patients from interacting and congregating with other patients and staff, and reduce the risk of passing on illnesses.

According to the National Survey of Employer-Sponsored Health Plans, while telemedicine options are widely available, utilization rates remain low, growing from 8 percent in 2018 to just 9 percent in 2019. That growth rate is very likely to increase substantially in the near future.

A preview of the expansion of telemedicine may be seen in China. According to World Health Organization official Dr. Bruce Aylward, China reorganized its medical response to the outbreak by immediately moving half of all medical care activity online.

Telemedicine is certain to be invaluable for behavioral health, as well. As stay-at-home orders and other restrictions ease, a new anxiety related to venturing into the outside world may affect many. The flexibility to offer remote mental health counseling and other behavioral services, either in place of or as a complement to in-person services, will be crucial.

> **"Patients with complex needs will still want to see their doctors in person, and many kinds of jobs are not automatable. But the trends are unmistakable—and probably irreversible."**
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> The Future is Not What it Used to Be: Thoughts on the Shape of the Next Normal
> Kevin Sneader and Shubham Singhal, McKinsey.com

Security Remains a Concern

Consumer concerns about the security of their health information predated the pandemic. A study conducted by Mercer Marsh Benefits titled "Health on Demand" found that people want access to healthcare that is personal, convenient, affordable—and secure. They're concerned about data protection and privacy risks associated with conducting healthcare-related activities through digital channels. At the same time, the study showed that respondents were willing to share private health care data in exchange for higher quality, more personalized and convenient health care.

Technology Rises to the Occassion

Other emerging technologies are set to complement the virtual doctor visit. Smartphone apps and sensors can track medications, AI is learning to diagnose medical conditions, and augmented reality may help with pain and stress management. Digital epidemiology tools, chatbot helpers, and electronic health record (EHR) guidance resources are all in use or on the development fast track.

Large technology companies are innovating to meet new needs, as well. Apple and Google have announced plans to launch APIs that will support interoperability between iOS and Android products by way of official apps from public health authorities. The two companies are also planning to build a Bluetooth-based contact-tracing functionality into their underlying operating systems. In anticipation of public concerns about privacy, the companies wrote in their announcements, "Privacy, transparency, and consent are of utmost importance in this effort, and we look forward to building this functionality in consultation with interested stakeholders.

We will openly publish information about our work for others to analyze."

Remote healthcare technologies that existed before the pandemic set in are working to keep up with demand. According to an article from McKinsey titled The Future is Not What it Used to Be: Thoughts on the Shape of the Next Normal, "Teladoc Health, the largest US stand-alone telemedicine service, reported a 50 percent increase in service in the week ending March 20, and is adding thousands of doctors to its network. The Federal Communications Commission is spending $200 million to improve connectivity between patients and virtual-healthcare providers, and the US Department of Health and Human Services has increased reimbursements for telemedicine and enabled cross-state provision of virtual care."

EXISTING DISRUPTION, ACCELERATED

Even before the global pandemic arrived, pretty much everything about the healthcare industry was changing — rapidly. Patients and consumers were already demanding higher levels of customer experience, and they expected those experiences to be digital. The ongoing impacts of the virus are certain to continue that dynamic of change.

Competition is heating up. New entrants into the healthcare market are disrupting existing patient relationships and fundamentally changing the way companies do business. Patients have easier access to their own data — and to technology that offers increased control over their own healthcare — weakening connections with long-term providers.

Now is a crucial time for the industry. The ability to effectively assess the threats and opportunities and implement the right technology solutions will be key to managing through the pandemic, and growing and thriving after the situation abates.

Customers want it all (don't we all?): In this time of crisis, customers are looking to the healthcare industry for answers and solutions. They expect expertise, security, and innovation. And, they want advantages of a large hospital system or an insurer with a wide coverage network combined with the personalized service of a neighborhood doctor's office or branch location.

How do healthcare providers meet these expectations across a massive customer base that expects highly personalized service — all in the midst of a global crisis?

FACING CURRENT HEALTHCARE INDUSTRY TRENDS

Like most industries grappling with the impact of digital on customer experience, the healthcare industry was seeing fundamental shifts in how it does business, even before the pandemic hit. But digital is a double-edged sword in many respects. Many of these changes benefit the customer and the organization in the long run, while presenting challenges in the short term, particularly to smaller organizations.

TREND 1

Consolidation Across the Healthcare Industry

The pressure to deliver care more efficiently has generated industry-altering mergers and partnerships. A single health insurance company dominates in more than four in 10 of the nation's metropolitan areas, according to the American Medical Association.

Smaller providers face shrinking margins, the expensive transition to electronic medical records, the tendency of younger physicians to prefer larger organizations, and the possibility of larger organizations overtaking them. Smaller insurers face their own battles. Multi-state employers prefer insurers that can serve all of their employees, and the analytic capabilities that lead to more effective care management are expensive without scale.

TREND 2

The Consumer as Payor

High deductibles plus rising premiums have turned consumers into healthcare decision-makers. This "consumerization" of the industry gives patients increased control over where, when, and how they receive care. More and more, that means receiving care through multiple channels and devices.

TREND 3

The Impact of Big Data

Big data has brought both opportunities and challenges to the industry. The enormous databases needed to deliver on the promises of data are quite different from the legacy systems most healthcare providers have—then there are the security issues around mandatory HIPAA compliance. Apple watch, FitBit, and similar devices that send an individual's health data into the cloud are an increasingly vital resource. In a healthcare future predicated on keeping people out of the hospital, the ability to manage and mine all this data is crucial. For healthcare organizations looking to get the most from big data, a well-supported, commercial distribution or cloud-based solution are the best ways to get started quickly.

Mitigating Rising Costs

It's well documented that healthcare expenses in the U.S. are massive. Statistic after statistic has shown that this trend will only continue. Costs have increased from 5 percent of GDP in the 1960s to nearly 18 percent today, without an accompanying increase in quality of care. Growth in both employer and employee health expenses is outpacing inflation.

Costs are rising faster than income, and the number of consumer bankruptcies attributable to healthcare expenses remains disproportionately high. Almost half of all Americans have at least one chronic illness, such as diabetes. These conditions are now responsible for 85 percent of healthcare costs. The sickest 5 percent of the population consumes 50 percent of all healthcare costs.

5%
of people

50%
of costs

$10,348

$146

1960   2016
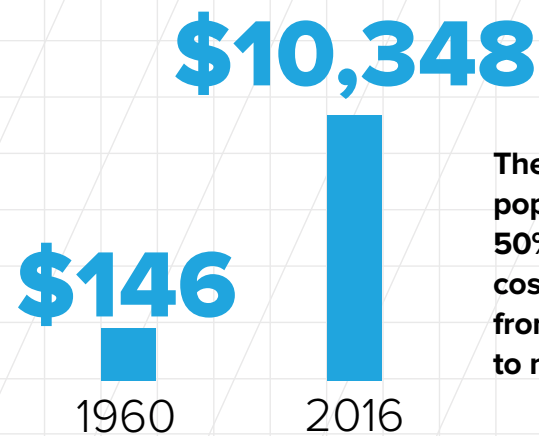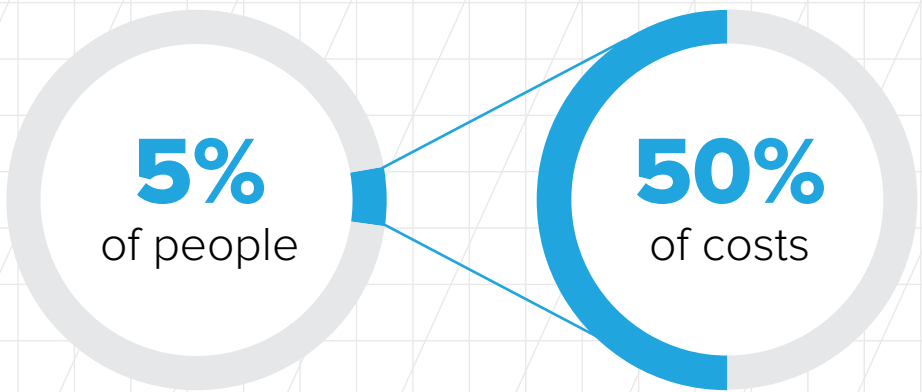
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CHALLENGES FACING HEALTHCARE

Healthcare as an industry is complex, so it's no surprise that the digital challenges associated with a best-in-class customer experience are too. An abundance of marketing tools and technologies exist, but each with its own set of customer data. The larger the organization, the more disparate systems. For all the strides technology has made in tailoring experiences to the customer's needs, wants and interests, healthcare is still deeply personal. While digital can't always take the place of face-to-face human interaction, it is uniquely able to offer the safe, contact-free experience that's needed right now.

Disconnected Customer Experience

In contrast to most other industries, healthcare consumers today usually encounter an inconvenient, inefficient and disconnected customer experience. Each provider typically treats a single patient in isolation, often without shared information or context. An efficient and successful treatment process requires the ability to personalize and prioritize based on a shared understanding of specifics, seen in the context of whole people, communities, and systems.

Data Silos

Today's healthcare workforce is increasingly mobile, collaborative and remote, requiring access to comprehensive and accurate patient data and medical information, in real time. That access underlies the ability to anticipate, understand and respond to issues in a timely and effective manner. But healthcare data today is locked in multiple, disparate and siloed systems.

Face-to-Face Interactions vs. Digital

Even before telemedicine started to become increasingly important, the traditional face-to-face interaction was already becoming less practical and less effective, even as it remains the default approach. That's due to a growing shortage of doctors and nurses, combined with a growing need for streamlined access to information. Today's patient expects to receive information and interaction online, is becoming increasingly comfortable with telemedicine, and expects providers to be accessible around the clock, and in multiple ways – even answering questions via social media platforms. The rapid adoption of interactive technologies such as chatbots and digital assistants provides a potentially sizable opportunity to provide personalized information about conditions, treatments, coverage, and more, on demand.

Lack of Automated Processes

From admission to discharge, and all points in between, the many processes involved in receiving treatment are traditionally tedious and inefficient. Providers lag in automating those interactions, which would enable them to refocus on patient care and provide a more personalized experience.

"Going digital brings tremendous opportunity for healthcare digital business leaders to develop personalized moments of engagement to support the kind of customer obsession that differentiates great companies from the rest."

Forrester: The Amazon Effect Is Primed To Disrupt Healthcare, 2018

3 PRIORITIES THAT HELP HEALTHCARE ORGANIZATIONS GROW AND THRIVE NOW, AND POST-PANDEMIC:

1.

Acquisition and Retention in an Increasingly Competitive Market

A growing range of choices and increasing access to information have combined to make acquiring new patients and customers more difficult, and keeping those patients and customers satisfied more crucial. Providers and insurers must seek effective ways to offer the experiences customers are seeking now, and to remain integral to the entire healthcare cycle.

2.

Quality Customer Experiences Across the Organization

Insurers in particular are consistently ranked among the lowest in customer experience quality. It's such a common perception that those who provide an experience that meets today's new standards and expectations see a major upside. Improving the experience quickly boosts loyalty, and even leads to an increased likelihood of recommending the brand to others.

3.

Engaging with Customers Throughout the Journey

Providing the right content, at the right time, in the right place, is proven to drive engagement and loyalty. That requires remaining present throughout the entire health journey: engaging with consumers when they are healthy, and remaining involved throughout an illness, and as they transition back to wellness.

FINDING THE WAY: HOW ACQUIA CAN HELP, RIGHT NOW

Delivering the experiences this extraordinary moment demands, and using those experiences to build a bridge to the future, calls for tools that are open, intelligent, flexible, scalable and secure. Data-driven healthcare customer experience leaders understand that, if they wait for the pandemic to pass and the "new normal" to arrive before taking action, they'll be left behind.

Now is the time to take steps to transform the customer experience, and invest in tools that offer adaptive intelligence, while enabling experimentation, exploration and innovation.

Customers want an increasingly intuitive, fully personalized digital experience—right now. For healthcare companies, the goal is better control of the brand's digital assets, and the effective use of analytics and insight to drive the most efficient journey of prospective and converted customers. Digging for data and insights to understand the true effectiveness of each effort is key. Knowing what's working, what's not, and where the gaps lie are all vitally important.

Acquia is the trusted expert for Open Digital Experience Platforms and the pioneering partner that can help companies rise to the occasion, and meet the unprecedented challenges the pandemic presents—starting today.

Acquia powers websites, applications and online experiences for 4,000 organizations, including some of the largest brands worldwide. You can build, design and run personalized digital experiences for today's healthcare consumers quickly and easily — all built on open-source pioneer Drupal with the required security.

Gain control of your digital assets, deliver the right content at the right time, and tap into the data and insights you need to understand what works, what doesn't, and why. Meet your prospective and converted customers with what they need at every step of the journey.

CONTACT ACQUIA

To learn about how Acquia can help you deliver a consumer-first experience, please contact us at sales@acquia.com.

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