NGPX

THE
DIGITIZATION
OF THE
PATIENT
JOURNEY

**How Healthcare Providers Are Enhancing
Access, Streamlining Services, and Improving
Outcomes with Digital Tools**

GOZIO

The Digitization of the Patient Journey

How Healthcare Providers Are Enhancing Access, Streamlining Services, and Improving Outcomes with Digital Tools

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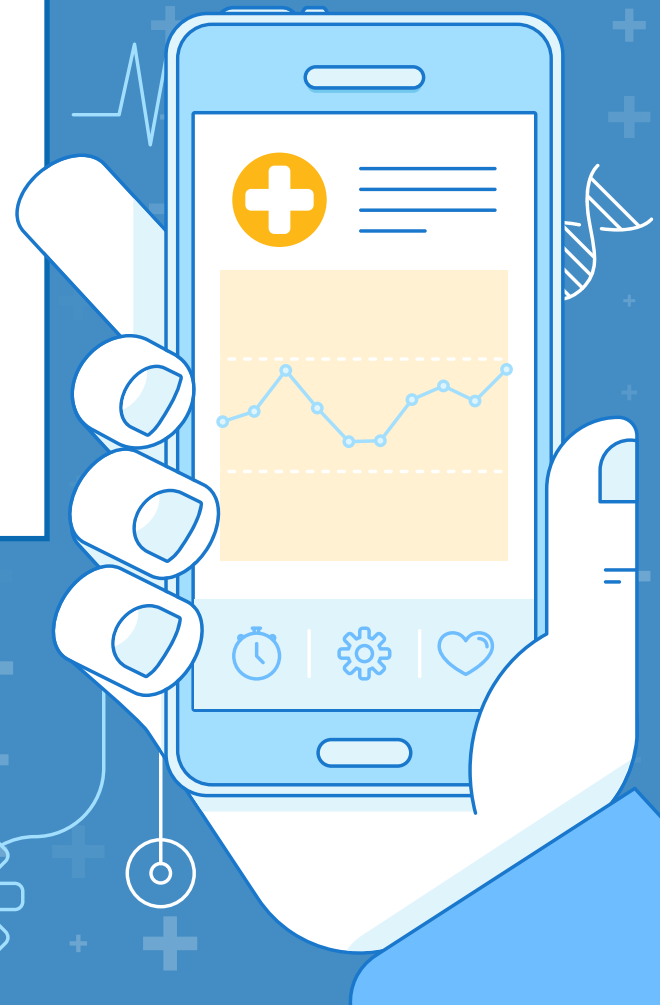**Chris.Rand@wbresearch.com**

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INSIGHTS
Worldwide Business Research

TABLE OF CONTENTS

EXECUTIVE SUMMARY

The patient experience (PX) is rapidly evolving as more and more healthcare organizations adopt digital and virtual solutions as part of their patient support strategies. This report examines the current landscape of digital transformation in patient care within healthcare organizations. It highlights the significant investments healthcare organizations have made in digitizing the patient experience as well as the challenges they now face in their efforts to streamline care.

The report reveals that mobile platforms are playing a critical role in digitization strategies. However, despite 67% of healthcare organizations having a dedicated mobile platform, 82% of these respondents express only moderate satisfaction with their effectiveness.

Moving forward, healthcare leaders believe their digital solutions should make services more accessible to patients and improve staff productivity to support better patient outcomes.
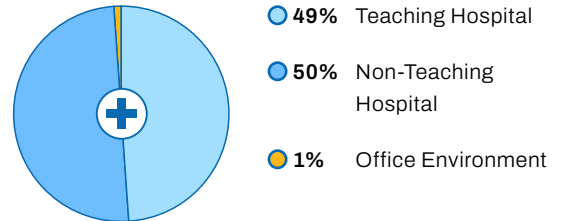
ABOUT THE RESPONDENTS

The WBR Insights research team spoke with 100 healthcare leaders from across the U.S. and Canada to generate the results featured in this report.

The survey respondents are predominantly senior leaders from healthcare institutions, with a nearly even split between teaching hospitals (49%) and non-teaching hospitals (50%). One respondent (1%) comes from an office environment.

What type of organization do you work for?

- **49%** Teaching Hospital
- **50%** Non-Teaching Hospital
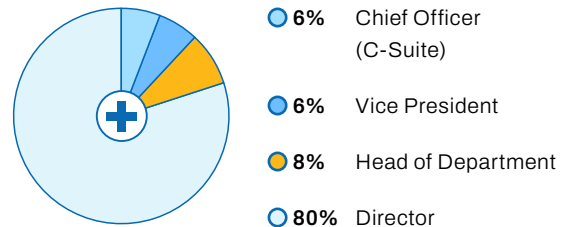- **1%** Office Environment

The majority of these leaders hold the position of director (80%), while the rest are department heads (8%), vice presidents (6%), and C-suite executives (6%).

What is your seniority?

- **6%** Chief Officer (C-Suite)
- **6%** Vice President
- **8%** Head of Department
- **80%** Director

These leaders represent a diverse array of roles within their organizations: 16% are involved in education and quality, 10% in nursing, 10% in patient experience, and another 10% in patient engagement, among other roles.

What is your role?

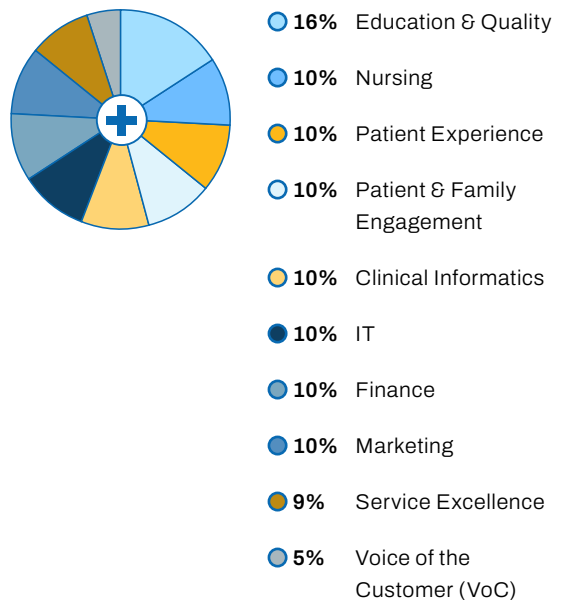- **16%** Education & Quality
- **10%** Nursing
- **10%** Patient Experience
- **10%** Patient & Family Engagement
- **10%** Clinical Informatics
- **10%** IT
- **10%** Finance
- **10%** Marketing
- **9%** Service Excellence
- **5%** Voice of the Customer (VoC)

KEY INSIGHTS

Among the respondents:

SELF-SERVICE, AI, AND MOBILE TECHNOLOGIES

- **80%** believe their current digital solutions for patient self-management are only somewhat effective.

- **73%** plan to invest in AI-powered chatbots, and **52%** plan to invest in mobile engagement apps and platforms over the next 12 months.

- Primary challenges to technology implementation include:
  - Integration issues with existing systems (**60%**)
  - Concerns about data security and privacy (**60%**)
  - Difficulties in driving initiatives across organizational boundaries (**54%**)

- **78%** expect their budgets for patient experience technologies to increase somewhat over the next 12 months.

CHALLENGES WITH CURRENT DIGITAL SOLUTIONS

- The following tasks are very easy or convenient for a significant number of patients given organizations' current tools:
  - Scheduling, rescheduling, or canceling appointments (**49%**)
  - Viewing and downloading medical records (**45%**), and
  - Requesting prescription refills or medication renewals (**44%**)

- The following tasks are not easy or convenient for a significant number of patients given organizations' current tools:
  - Communicating securely with healthcare providers (**31%**)
  - Accessing educational resources (**23%**)
  - Finding a physician within the system (**22%**)

- Only **24%** currently have the technology for remote patient monitoring and data collection, though **74%** are pursuing this capability.

EFFECTIVENESS OF MOBILE PLATFORMS

- **67%** have a dedicated mobile platform for digital engagement without requiring a login, yet **82%** of these respondents are only somewhat satisfied with its effectiveness.

- **82%** of those without a dedicated mobile platform plan to adopt one within the next two years

- **78%** of all the respondents can offer essential patient-facing digital capabilities on their mobile platforms.

- The top goals for mobile platforms are:
  - Making services more accessible to patients (**53%**)
  - Improving staff productivity (**45%**)
  - Improving the overall patient experience (**37%**)

# SELF-SERVICE, AI, AND MOBILE TECHNOLOGIES ARE DEFINING DIGITIZATION

The digitization of the patient experience is increasingly being shaped by self-service options, artificial intelligence (AI), and mobile technologies. Healthcare leaders have identified significant gains from their current technology deployments, but they are still in the process of encouraging adoption among patients and addressing both internal and external challenges.

Most of the respondents (80%) view their current self-management tools as only somewhat effective, while 7% consider them not very effective. This indicates a gap between the potential of digital tools and their current implementation, suggesting there is room for improvement in making these technologies more impactful for patient self-management.
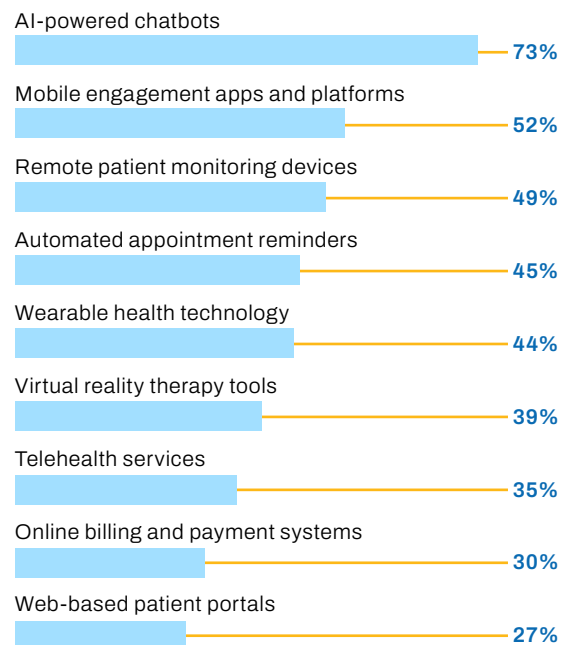
Looking forward, healthcare organizations are prioritizing investments in AI-powered chatbots and mobile engagement apps, with 73% and 52% of respondents, respectively, planning to increase spending in these areas over the next 12 months. Additionally, nearly half of the respondents (49%) are focusing on remote patient monitoring devices, while 45% are investing in automated patient reminders and 44% in wearable health technology.

This trend highlights a strategic shift toward leveraging AI and mobile platforms to enhance patient engagement and streamline healthcare services. AI has the potential to reduce manual tasks for both patients and caregivers, analyze patient data more effectively, and even generate relevant content for patients relating to their care.

In your view, how effective are your current digital solutions at allowing patients to self-manage their care?

- **13%** Very effective
- **80%** Somewhat effective
- **7%** Not very effective
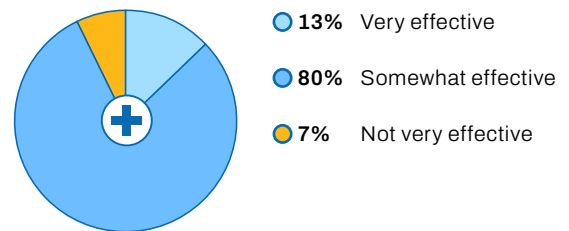
Which of the following are patient experience technologies your organization will invest more in over the next 12 months?

Technology	Percent
AI-powered chatbots	**73%**
Mobile engagement apps and platforms	**52%**
Remote patient monitoring devices	**49%**
Automated appointment reminders	**45%**
Wearable health technology	**44%**
Virtual reality therapy tools	**39%**
Telehealth services	**35%**
Online billing and payment systems	**30%**
Web-based patient portals	**27%**

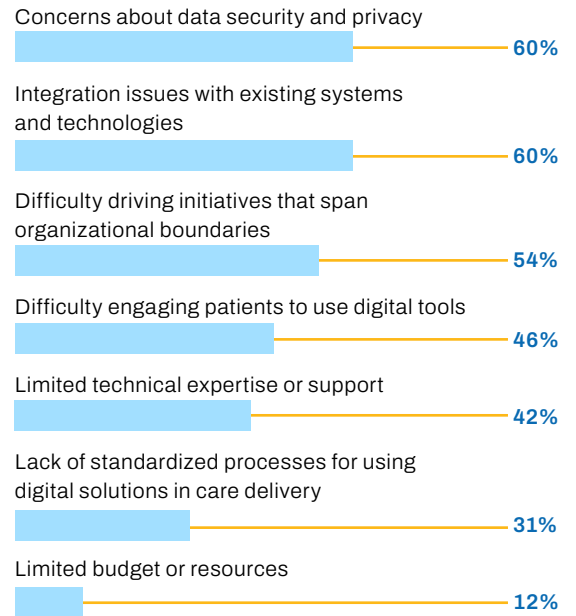However, the integration of these technologies is not without challenges.

In each case, a majority of respondents (60%) report difficulties in integrating new digital solutions with existing systems and technologies, as well as concerns about data security and privacy. Furthermore, 54% of respondents face challenges in driving initiatives that span organizational boundaries, and 46% struggle with engaging patients to use digital tools.

These challenges underscore the complexity of implementing digital solutions in healthcare and the need for robust strategies to overcome these barriers. Healthcare organizations may need to partner with vendors or third-party consultancies to seamlessly integrate these technologies, encourage adoption, and help staff reach proficiency.

Which of the following are challenges your organization faces in implementing and integrating digital solutions for patient self-management?

Concerns about data security and privacy
60%

Integration issues with existing systems and technologies
60%

Difficulty driving initiatives that span organizational boundaries
54%

Difficulty engaging patients to use digital tools
46%

Limited technical expertise or support
42%

Lack of standardized processes for using digital solutions in care delivery
31%

Limited budget or resources
12%

Thankfully, there is optimism about the future of patient experience technologies, with 78% of respondents expecting their budgets to increase somewhat over the next 12 months and 2% anticipating a substantial increase. This financial commitment reflects a recognition of the importance of digital tools in transforming the patient journey and improving healthcare outcomes.

As healthcare providers continue to invest in and refine these technologies, the potential for enhanced patient experiences and streamlined services becomes increasingly attainable.

How will your budget for patient experience technologies change over the next 12 months?

- **2%** Increase substantially
- **78%** Increase somewhat
- **20%** Stay about the same
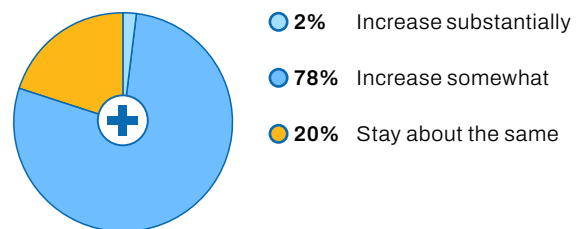
SOME PATIENT TASKS REMAIN A CHALLENGE WITH CURRENT DIGITAL SOLUTIONS

Despite advancements in digital healthcare tools, several patient tasks continue to present challenges. The results of the study suggest that some patients may be resistant to using digital tools due to their unfamiliarity with such technologies, while others may be struggling with overly complex platforms that are difficult to access, especially for certain tasks.

Nearly half of the respondents (49%) indicate that scheduling, rescheduling, or canceling appointments is very easy and convenient for patients using existing digital tools. Similarly, 45% believe viewing and downloading medical records to be very convenient for patients, and 44% expressed the same for requesting prescription refills or medication renewals.
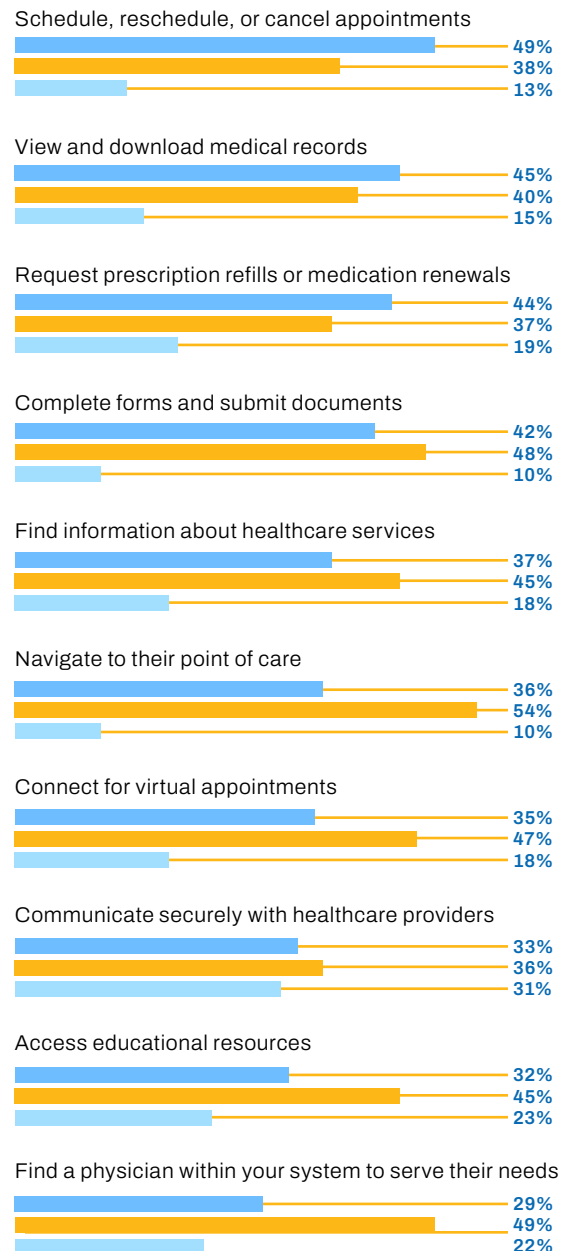
However, accessing educational resources remains a significant challenge, with 45% of respondents stating it is only somewhat easy and convenient for patients, and 23% indicating it is not easy and convenient at all. This highlights a critical gap in providing patients with the information they need to manage their health effectively.

Additionally, finding a physician within their system to meet specific needs is not straightforward for many patients, with 49% of healthcare leaders believing it is only somewhat easy and convenient and 22% finding it not easy or convenient for patients. These challenges suggest that current digital tools may not be fully meeting patient needs in terms of accessing comprehensive healthcare information and services.

They also suggest that patients struggle with these technologies. This could be due to difficult interfaces or overly-complex layouts. It could also be due to integration issue with other technologies.

In your view, how easy and convenient is it for patients to accomplish the following tasks given your existing patient-facing digital tools?

○ Very easy and convenient
● Very easy and convenient
● Not easy and convenient

Schedule, reschedule, or cancel appointments
- 49%
- 38%
- 13%

View and download medical records
- 45%
- 40%
- 15%

Request prescription refills or medication renewals
- 44%
- 37%
- 19%

Complete forms and submit documents
- 42%
- 48%
- 10%

Find information about healthcare services
- 37%
- 45%
- 18%

Navigate to their point of care
- 36%
- 54%
- 10%

Connect for virtual appointments
- 35%
- 47%
- 18%

Communicate securely with healthcare providers
- 33%
- 36%
- 31%

Access educational resources
- 32%
- 45%
- 23%

Find a physician within your system to serve their needs
- 29%
- 49%
- 22%

Remote patient monitoring and data collection also present challenges, mainly from a lack of implementation by healthcare providers. Only 24% of respondents reported having technology in place for monitoring patient conditions and collecting health data remotely.

However, a promising 74% are pursuing this capability, indicating a strong interest in expanding remote healthcare services.

Does your organization currently have technology in place to monitor patient conditions and collect health data remotely?

24% Yes

74% No, but we are pursuing this capability

**2%** No, and we are not pursuing this capability/this is not relevant to us
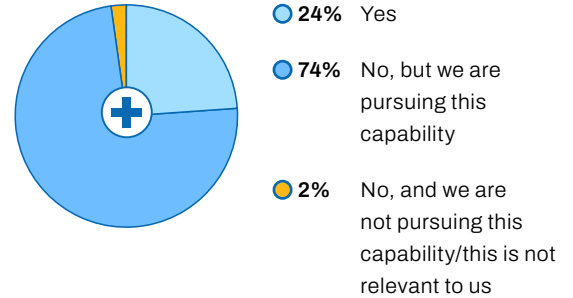
Among those that already have such technology, 87.5% claim it supports remote patient monitoring only somewhat well. While the infrastructure for remote monitoring is being developed, its effectiveness and integration into patient care require further enhancement.

Overall, while digital tools have made certain patient tasks more convenient, there are still significant areas where these solutions fall short. Common challenges associated with digital solutions in healthcare include patient engagement challenges, technology integration challenges, privacy concerns, and overly complex systems.

Addressing these challenges will be crucial for healthcare providers aiming to fully realize the benefits of digital transformation in patient care.

Since you said you currently have technology in place to monitor patient conditions and collect health data remotely, how well do your current tools support remote patient monitoring?

12.5% Very well

87.5% Somewhat well
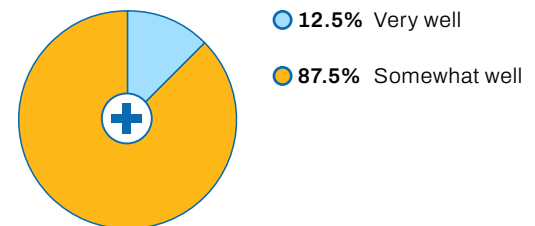
DEDICATED MOBILE PLATFORMS ARE COMMON BUT ONLY SOMEWHAT EFFECTIVE

Mobile solutions are becoming increasingly vital to the future of patient experience. They provide convenient access to healthcare services, enhance patient engagement, and streamline communication between patients and providers. As healthcare becomes more digitized, mobile platforms offer a user-friendly interface that can integrate various digital tools, making healthcare management more accessible for patients.

Additionally, mobile solutions can help reduce administrative burdens on healthcare staff by automating routine tasks and facilitating real-time data sharing.

Currently, 67% of healthcare organizations have a dedicated mobile platform that allows patients to access digital engagement solutions without needing a login.

Does your organization currently have a dedicated mobile platform where consumers and patients can access all your digital engagement solutions without a login?

- **67%** Yes
- **33%** No

However, satisfaction with these platforms is moderate, as 82% of respondents who have such platforms report being only somewhat satisfied with their effectiveness. This suggests that while mobile platforms are widely implemented, there is significant room for improvement in terms of functionality, performance, and the user experience.
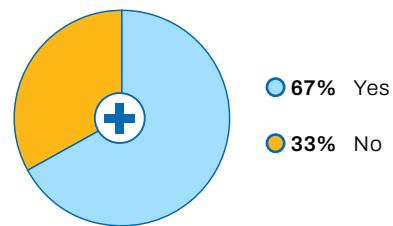
Since you said, "Yes," how satisfied are you with your current mobile engagement platform?

- **8%** Very satisfied
- **82%** Somewhat satisfied
- **10%** Not very satisfied

Among the organizations that do not yet have a dedicated mobile platform, most (82%) plan to adopt one within the next two years, indicating a strong push toward a future of mobile patient engagement. However, 15% of these organizations do not plan to adopt a mobile platform, and 3% are unsure.
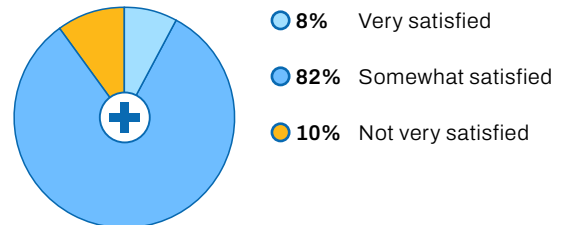
Since you said, "No," is your organization planning to adopt a dedicated mobile engagement platform for engaging consumers and/or patients within the next two years?

- **82%** Yes
- **15%** No
- **3%** I'm not sure.

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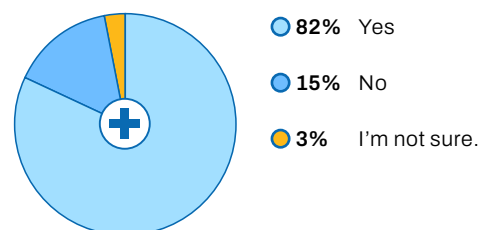
Among those not planning to adopt a consumer-facing mobile platform, 80% believe their current patient portal is sufficient, highlighting a divide in perceptions of the necessity and value of dedicated mobile platforms. These respondents likely rely on web-based portals currently, and may not have enough funding, knowledge, or incentive to adopt a dedicated mobile platform.
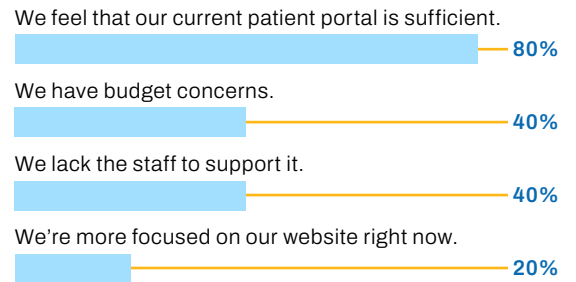
Relying on an existing, web-based patient portal allows the organization to forgo difficult changes associated with implementation, but it also limits the potential to customize an app according to the changing needs of the marketplace. In addition, mobile accessibility tends to be more convenient for patients. With the right solution, a mobile platform can offer patients the same tools and capabilities as a web-based platform with the added convenience of being able to add and replace app functions or vendors as needs change.

Indeed, most respondents (78%) report that they can offer the most important patient-facing digital capabilities on their mobile platforms. This indicates that while leaders consider most current mobile platforms to be only somewhat effective, leaders believe they are meeting essential needs.
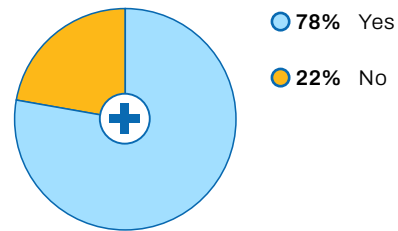
The primary organizational goals for mobile platforms include making services more accessible to patients (53%) and improving staff productivity (45%). These priorities underscore organizations' dedication to patients' health outcomes. Improving in this area requires a dual focus on enhancing patient experience and strengthening operational efficiency through mobile technology.

In summary, while dedicated mobile platforms are common in healthcare settings, they could be more effective both for healthcare organizations and their patients. There is a clear opportunity for healthcare providers to refine these platforms to better meet patient needs, ultimately contributing to improved patient outcomes and satisfaction.
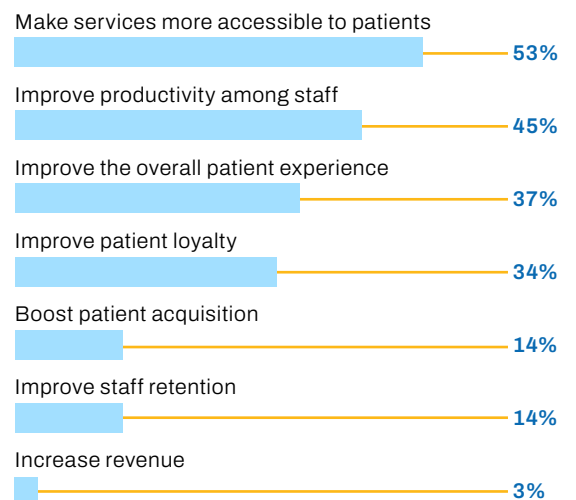
Since you said you aren't planning to adopt a dedicated mobile engagement platform, what are your reasons for not doing so?

We feel that our current patient portal is sufficient.
80%

We have budget concerns.
40%

We lack the staff to support it.
40%

We're more focused on our website right now.
20%

Are you able to offer your most important patient-facing digital capabilities on your mobile engagement platform?

- **78%** Yes
- **22%** No

The most successful mobile apps support key organizational goals. Which of the following two goals would you prioritize most for your mobile platform?

Make services more accessible to patients
53%

Improve productivity among staff
45%

Improve the overall patient experience
37%

Improve patient loyalty
34%

Boost patient acquisition
14%

Improve staff retention
14%

Increase revenue
3%

CONCLUSION: THE MOST IMPORTANT DIGITIZATION STRATEGIES FOR THE PATIENT EXPERIENCE

To gain a better understanding of the future of digitization in healthcare, researchers asked the respondents to identify their most important strategies for digitizing the patient experience over the next three years.

One of the most common strategies is the implementation of remote check-in solutions. As one healthcare leader stated, "We aim to install remote check-in kiosks in various locations," which highlights the push toward reducing wait times and improving patient convenience.

Expanding digital patient support services, such as virtual health coaches and online support groups, is also a priority. This approach not only facilitates patient engagement, but also empowers patients to manage their health more proactively.

Another significant strategy involves the use of virtual reality (VR) and artificial intelligence (AI) to enhance patient care and education. Organizations plan to use VR technology to familiarize patients with procedures, which can help reduce anxiety and improve outcomes.

As one respondent mentioned, "Our strategy involves preparing patients for surgeries by providing virtual tours of the procedure and recovery process."

Furthermore, AI-driven tools are being developed to create personalized wellness programs and digital health roadmaps, offering patients tailored guidance throughout their healthcare journey. These technologies aim to provide more personalized and interactive experiences, encouraging patients to take a more active role in their health.

Finally, the development of comprehensive digital ecosystems is also a key focus for many organizations. This includes creating systems that integrate with wearable health technology and offer real-time updates on a patient's health status for continuous health monitoring.

By building a seamless digital infrastructure, healthcare providers can ensure that patient data is easily accessible and shared across platforms, enhancing care coordination and enabling timely interventions.

As organizations continue to invest in these digital strategies, the patient journey is expected to become more streamlined, efficient, and patient-centered, leading to better healthcare experiences and outcomes.

> "
>
> "Our strategy involves preparing patients for surgeries by providing virtual tours of the procedure and recovery process."

HEALTH SYSTEMS GET RESULTS WITH GOZIO

Your mobile strategy is a critical piece of the success of your digital front door. These three health systems are winning awards, achieving recognition, and seeing results from their mobile apps, built by Gozio.

WakeMed

WakeMed Health and Hospitals
WakeMed chose Gozio to provide a true "digital companion" for patients. "It's easy," says Debbie Laughery, Vice President of Marketing and Communications at WakeMed Health & Hospitals. "I think that's what people are looking for. They are looking for that easy button."

2.5K Downloads/month

1.9M Sessions

74% Reuse

University Health

191K Downloads

3.4M Sessions

83% Reuse
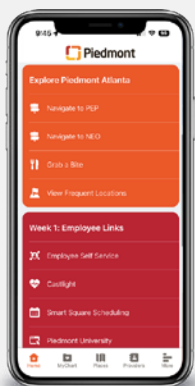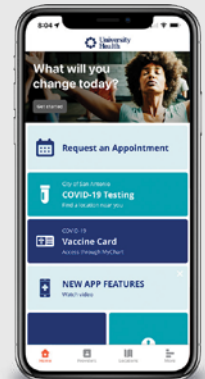
University Health San Antonio
University Health's mobile app was designed to anticipate consumers' needs. After launching the new app, usage rose from an average of 100 sessions a day to 10,000 sessions a day.

Piedmont HEALTHCARE

Piedmont Healthcare
"The time and effort we put into designing Piedmont's mobile app enables patients and families to feel confident in arriving at any destination in our system," said Katie Logan, Vice President of Patient Experience for Piedmont. "It also ensures that consumers will find value in our digital front door beyond the day of their visit."
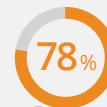
440K Downloads

9.5M Sessions

78% Reuse

GOZIO Health

goziohealth.com

KEY SUGGESTIONS

○ **Prioritize the enhancement of dedicated mobile platforms to improve patient satisfaction:** Focus on gathering feedback from patients and staff to identify functionality gaps and usability issues that hinder effective engagement, ensuring that these platforms truly meet the needs of everyone.

○ **Adopt comprehensive digital ecosystems:** Develop integrated systems that facilitate real-time data sharing and health monitoring to improve care coordination. This enables healthcare providers to respond swiftly to patient needs, ultimately enhancing the quality of care and patient outcomes.

○ **Leverage virtual health services and remote check-in solutions:** Remote check-in and virtual consultations can streamline the patient experience and reduce wait times. These strategies not only improve convenience for patients, but also optimize staff productivity by managing appointment flows more efficiently.

○ **Utilize AI and VR technologies for patient engagement:** Explore the integration of artificial intelligence and virtual reality in patient education and wellness programs to create a more interactive healthcare journey. Personalized digital engagements can help alleviate patient anxiety and empower patients to take an active role in their health management.

ABOUT THE AUTHORS

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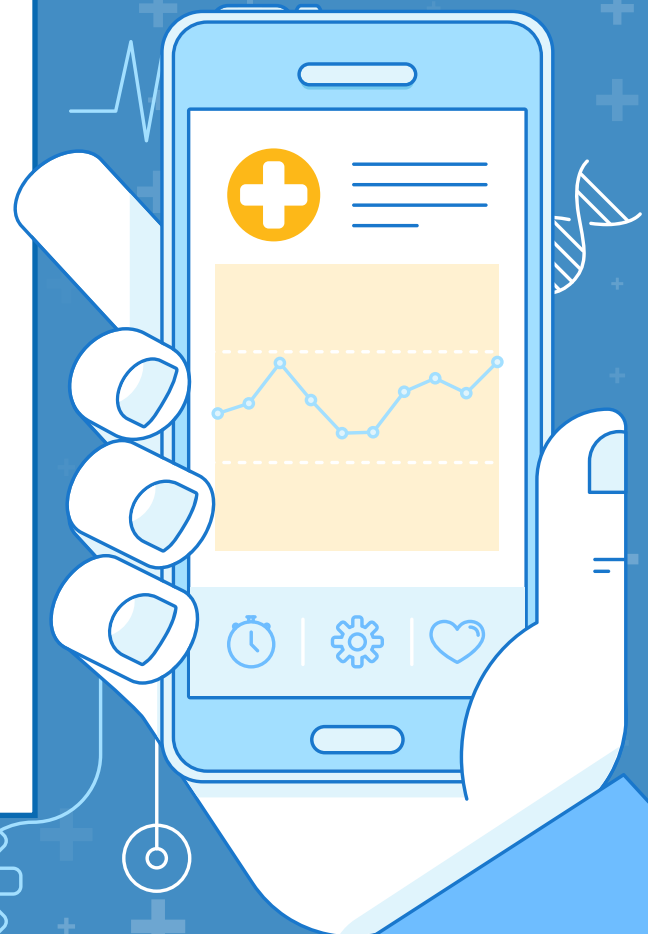
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NGPX

More than just an annual conference, NGPX is a community that unites America's best and brightest patient experience leaders to connect, inspire, and transform healthcare. At NGPX, self-care is just as important as patient care. You'll not only learn from exceptional speakers and network with peers but also find a space to relax and unwind, so you can return to work re-energized and inspired.

For more information, please visit
patientexperience.wbresearch.com.

ABOUT THE SPONSOR

Gozio Health partners with health systems to increase consumer engagement using a proven mobile platform and strategy. The entire healthcare journey—both in-person and digital—is improved by giving systems the flexibility to consolidate all their patient-facing digital solutions into one premium native mobile experience accessible by anyone, anywhere.

Combined with Gozio's patented indoor positioning technology, the platform empowers consumers to confidently navigate their healthcare journey and enables health systems to more effectively achieve their business goals. Gozio customers surveyed in a 2021 KLAS Research Emerging Technology Spotlight report were 100% satisfied and would buy again.

For more information, visit **www.goziohealth.com.**