# Secrets to Achieving High Mobile Adoption for Patient Engagement

Insights from the 2022 Gozio Healthcare Executive Survey

Nine out of ten healthcare executives believe a well-designed, patient-facing mobile app would help their organization achieve its digital strategy goals, a recent Gozio survey found. Yet 18% of health systems do not have a mobile solution, and among those that do, just 22% have one that is custom-built for their organization and the communities they serve.

It's a sign of the breakdowns in digital efficacy that can occur when health systems are unable to tailor their mobile engagement offerings to the unique needs of their patient populations.

In June 2022, Gozio commissioned a survey of 272 health system executives—conducted by a third party—along with interviews with five directors of patient experience and marketing to determine their top challenges with mobile engagement and digital health.
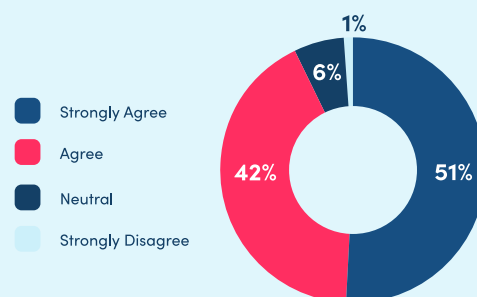
Among the survey's findings:

**1** **Patient-facing mobile apps are a critical component of health systems' digital strategy.** Executives ranked the importance of a patient-facing mobile solution to their digital strategy as an 8.4 out of 10. In fact, more than 50% of health system executives ranked the importance of a mobile app as a 9 or a 10.

**2** **Nearly two out of three healthcare executives agree that mobile engagement can help achieve broader business goals.** For instance, according to survey results, 63% of executives say a well-designed patient-facing mobile app would help their health system deal with labor challenges.

**3** **Yet, of the 82% who have some kind of mobile presence, only 38% would rate its success as an 8 or higher on a scale of 1 to 10.** Few organizations see mobile downloads of over 10,000, while many others either don't know how much engagement they have or admit they aren't tracking adoption at all.

## Healthcare execs say a well-designed app could be a game changer for digital strategy

"A well-designed patient facing mobile app with a strong utilization by patients would help [our] health system achieve its digital strategy goals"

Strongly Agree
Agree
Neutral
Strongly Disagree

1%
6%
42%
51%

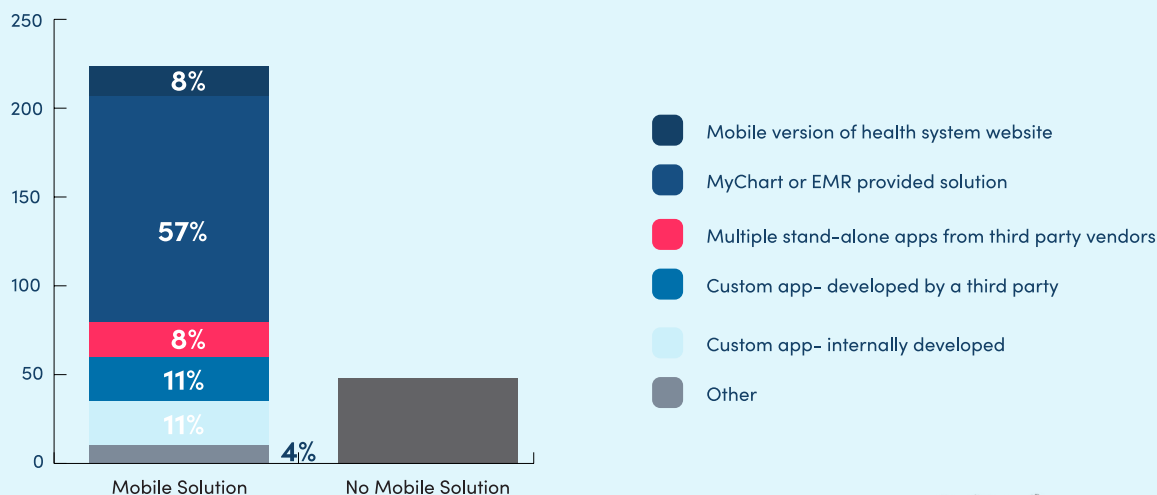Source: Gozio survey of healthcare executives, June 2022

# The state of mobile adoption in healthcare

The Gozio survey shows 68% of the organizations represented have a mobile app, while 32% do not. More than four out of five surveyed say their organization will most likely invest in mobile technology over the next three years.

Among health system executives whose organizations do not have a mobile solution, 30% say their organizations are very likely to invest in mobile over the next 12-18 months.

Roughly half the organizations surveyed that have implemented a healthcare mobile app are using their EHR (57%). The exhibit below shows the range of mobile solutions health system executives surveyed by Gozio have explored.

## Which best describes the type of mobile solutions that your health system uses or plans to implement in the next 6 months?

Mobile Solution bar (stacked):
- 8% — Mobile version of health system website
- 57% — MyChart or EMR provided solution
- 8% — Multiple stand-alone apps from third party vendors
- 11% — Custom app- developed by a third party
- 11% — Custom app- internally developed

No Mobile Solution bar:
- 4% — Other

Legend:
- Mobile version of health system website
- MyChart or EMR provided solution
- Multiple stand-alone apps from third party vendors
- Custom app- developed by a third party
- Custom app- internally developed
- Other

**What does it take to successfully leverage mobile for patient engagement—and how can health systems take their mobile strategy to the next level?**

Here are three key insights based on the survey:

### 1    The ability to customize a mobile platform is foundational to engagement and value.

Just one out of five health systems with a mobile presence has a customized offering—one that goes beyond a "one size fits all mentality" to address provider- and population-specific nuances. This limits the ability of these organizations to create the types of mobile experiences their consumers crave by:

• Using data to determine the digital services their unique populations want and need.

• Identifying and solving the pain points that exist in the patient journey.

• Creating a digital handholding experience for consumers at each point in their journey, from the home to parking to the point of care and on through discharge and follow-up.

For instance, at one health system, an executive shared, "Our medical arts building is hard to find, and patients have trouble getting in and out. We use volunteers and maps to help, but patients still get lost." This challenge could be addressed with a platform that includes experiential wayfinding. Such an offering does more than guide patients from Point A to Point B. It also helps remove stress from the patient experience by easing the logistics associated with care. "Until I got involved, no one was even thinking about how wonderful [wayfinding] would be for someone who just got diagnosed with cancer and had to find the surgery department," another executive said.

A mobile platform that allows for customization also helps healthcare organizations pivot quickly when circumstances change, as they did when the coronavirus pandemic emerged. At Piedmont Health in Atlanta, leaders leveraged the organization's mobile platform to inform patients of new protocols when COVID-19 hit. They deployed video visits via MyChart and expanded the use of self-service scheduling to include scheduling for vaccinations via the mobile app. This level of customization drove a 63% increase in users of MyChart, the health system's patient portal, from May 2020 to May 2021 alone. It also fueled a 22% increase in online payments.

What holds health systems back from adopting a customizable mobile platform? Many of the healthcare executives surveyed by Gozio cited budgeting constraints or the desire to leverage existing investments in their EHR. Others were simply not sure how to get started, including how to find the right vendor.
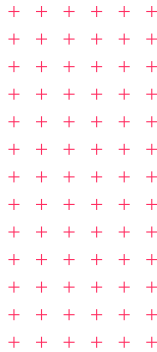
The stakes for designing the right mobile experience are high: Half of consumers say a bad digital experience can ruin their entire experience with a provider, and one in four would switch providers for high-quality digital services, according to an Accenture survey. This makes the cost of inaction one that few organizations can afford to bear.

Further, the right vendor will work with your organization to enhance an existing digital plat-form—such as a patient portal—to build out a customized approach in an economical way.

To design a customized approach, start by laying out the biggest organizational challenges your system hopes to solve with its digital strategy. For survey respondents, these include:

- **Wait times.** "The app needs to have a way of easing the unknown of wait times—even at the physician offices," one respondent said. Access to wait times should be instantaneous, like alerts regarding gate changes at airports.

- **Staff efficiency.** "It's more about trying to solve pain points for staff, like digital options to make staff work easier, which would ultimately improve the patient experience," one executive said. One example: enhanced vehicles for communication between patients and physicians, including self-service options for patients who just want their lab results or have a simple question following discharge.

- **Patient retention.** "We have struggles with reputation management," an executive shared. The right mobile app will facilitate outreach that helps keep patients in your system, such as by connecting consumers to patient advocates or customer service representatives when questions that could affect the consumer's view of the system arise. It will also serve as an intelligent resource for consumers by making them aware of services that could meet their needs, such as by alerting consumers to videos that pr mote new elective surgery offerings, targeted to specific demographics.

It's important to consider the types of digital solutions that could present the greatest benefit to your organization over the next five years. For survey respondents, these include solutions that could help deepen relationships with care providers as well as patients (beyond the point of care).

## Survey reveals health systems barriers to investing in mobile platforms

**If your health system has a mobile app but does not have a custom app or does not have plans to implement a custom mobile app, why not?**

- No budget
- Other
- Patient adoption would be too low to justify effort or cost
- Not sure how to get started
- Process and people changes would be too great
- Have not found the right vendor

5% 5%
7%
16%
39%
28%
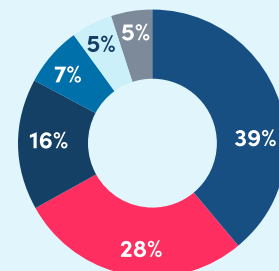
**2**

# The more robust the mobile app's offerings, the higher the level of engagement.

Today, 83% of the more than 350,000 health-related mobile apps on the market get down-loaded fewer than 5,000 times, according to IQVIA—a sign of their lack of perceived value for consumers. Most health systems should expect to see tens, or even hundreds, of thousands of downloads Among health systems surveyed by Gozio, low numbers of mobile downloads—or the inability to track performance—point to lackluster offerings:

- Just 18% of health system execs say their mobile downloads exceeded 10,000. 10% of those rated themselves as a 5 or lower in the success of their mobile adoption on a scale of 1 to 10, indicating they are aware that number is subpar.

- Fewer than 20% would rate their mobile adoption success as a 9 or 10 on a scale of 1 to 10.

- About half of those surveyed either didn't track downloads or weren't sure what their performance looked like. Organizations can't be successful with mobile engagement or their ability to drive business goals using mobile if they can't track the impact.

## When it comes to digital strategy, size matters

- **Smaller healthcare organizations (900 beds or less)** tend to focus their digital efforts on their website, social media presence and customer relationship management. These organizations may be missing out on key components—and benefits—of a more robust strategy.

- **Larger health systems (more than 900 beds)** have considerable budgets and internal expertise. This can be an advantage, but it can also lead to "platform sprawl," which essentially happens when too many tools and features are disjointed. These organizations may need help bringing their digital health solutions together into a cohesive mobile offering.
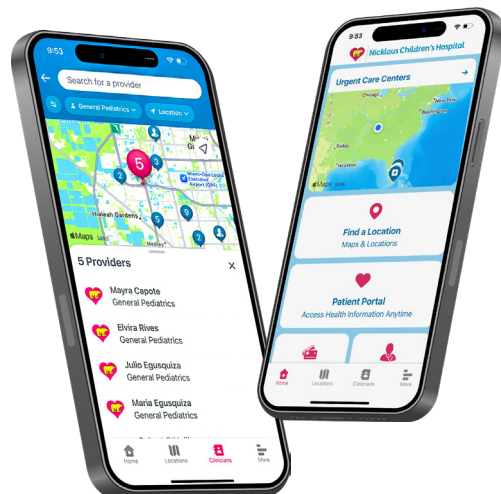
## How would you rate your health system's success on mobile solution adoption on a scale of 0 to 10 with 10 being the most successful?



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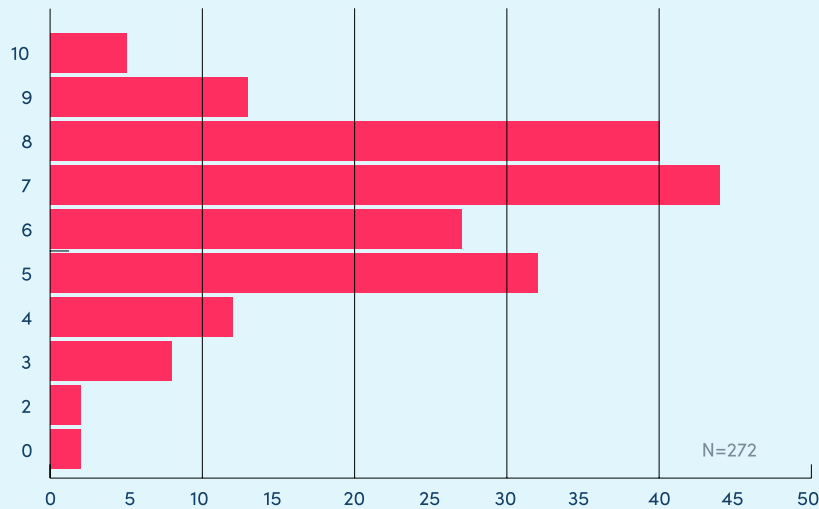
With low downloads signaling low value to the user, the desire to increase consumer engagement with digital investments could be the reason why **82% of health system executives plan to increase investment in patient-facing mobile technology** over the next three years.

Taking a hard look at user rates for mobile apps by individual service can point to what works, what doesn't, and whether a provider's approach to their patient-facing mobile platform is truly innovative.

# Breaking Down Mobile Platform Features
# In Health Systems

## Prevalent Functions Among Health Systems



Legend:
- Currently have
- Don't have but plan to implement
- Don't have and no plan to implement

Categories: Virtual Visits, Payment, Health System general info, Provider Directory, Scheduling, Registration, Wayfinding (within facility), Wayfinding (home to facility), Other (please specify)

N=272

## Which is the most utilized function on your mobile solution?



Categories: Health System general info, Scheduling, Not Sure, Payment, Registration, Provider Directory, Virtual Visits, Not Tracked, Other, Rounding, Wayfinding (home to facility)
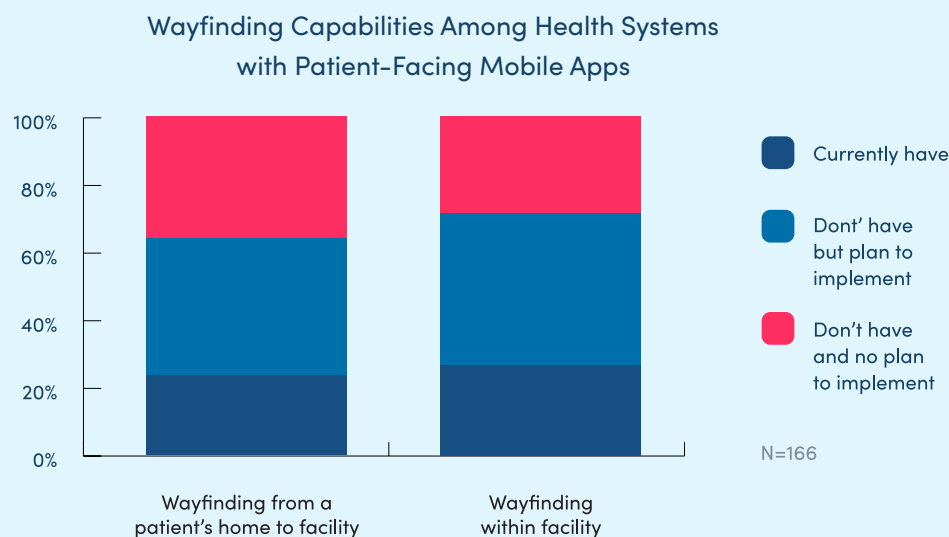
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Most health systems offer virtual visits and online payment—no surprise, given the sharp decrease of availability for in-person encounters during the height of the pandemic and the need to facilitate collection of revenue. Yet the most utilized functions on patient-facing apps are links to general information about the system and self-scheduling features.

This made the survey team wonder: How do health systems determine the types of features consumers most want to see in a mobile app? More important: Are they able to determine the types of features consumers most want to see?

Survey respondents' wish lists of mobile offerings offer a starting point on ways to deliver next-level mobile engagement that strengthens loyalty and improves satisfaction. This wish list includes:

• A tool for patients to take notes and include family members virtually.

• Digital support for hospital-at-home services.

• A platform for communicating with family members of patients.

• Wayfinding, a service that **40% of health system executives** plan to implement, on top of the 25% who already do.

## Penetration Of Wayfinding Capabilities In Patient-Facing Digital Apps

Wayfinding Capabilities Among Health Systems
with Patient-Facing Mobile Apps



Legend:
- Currently have
- Dont' have but plan to implement
- Don't have and no plan to implement

N=166

Categories:
- Wayfinding from a patient's home to facility
- Wayfinding within facility

## What's holding EHR-based mobile users back from customizing their platform? Survey reveals insight

Among the 155 users surveyed who rely on EHR functionality for their mobile platform, about 20% do not customize their app. The top reasons: they don't have the budget, haven't found the right vendor or aren't sure how to get started.

But while an EHR's patient portal provides a solid basis for a mobile offering, requiring patients to use a username and password to access it means it isn't available to the entire community the organization serves. And, when an organization is unable to add or adjust mobile offerings in response to the changing needs of its population, this not only hinders the organization's ability to improve satisfaction, but also limits its ability to meet strategic goals.

This could be why 65% of organizations that have a mobile app that is not customized plan to increase their mobile app investments within the next three years.
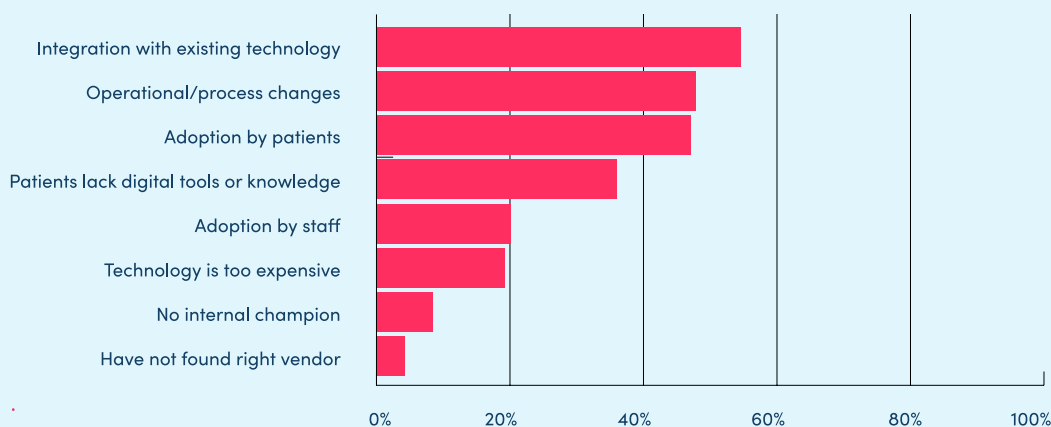
One of the reasons digital platforms often fail to meet consumers' expectations is what Go-zio calls the "Frankenstein app" problem: when organizations launch a mobile solution with a mishmash of features and struggle to tie these features together cohesively. The result is a highly disjointed experience that frustrates consumers and reflects poorly on the brand.

This problem is often exacerbated when an organization has multiple mobile offerings (e.g., one app for bill pay, one app to schedule, one app for the urgent care) that compete for the consumer's attention, essentially moving from a Frankenstein app to a Frankenstein strategy that is unlikely to deliver value.

So much rides on a health system's digital strategy—and when it comes to the impact of this strategy on improving patient care, health systems of all sizes are largely pleased (see the exhibit to the right). Yet more than half of health system executives (54%) say their organizations continue to struggle with integrating their mobile app with their organization's existing technology. Additionally, 48% struggle to navigate the operational and process changes that come with implementing a patient-facing mobile app (see the exhibit below).

## What are the top challenges your organization faces that negatively impact the rating of your health system's digital strategy?



| Challenge | |
|---|---|
| Integration with existing technology | |
| Operational/process changes | |
| Adoption by patients | |
| Patients lack digital tools or knowledge | |
| Adoption by staff | |
| Technology is too expensive | |
| No internal champion | |
| Have not found right vendor | |

0%   20%   40%   60%   80%   100%

To make the most of a health system's mobile platform, leaders should **explore ways to create a digital hand-holding experience for consumers**. The best platforms guide customers from one interaction to the next, offering assistance where needed, from wayfinding to follow-up options to connections to live support when questions arise, all at the touch of a smartphone. The key to designing a digital hand-holding experience: Look at your customer journey from the end-user's point of view. Then, develop digital services and interventions that facilitate access and help customers obtain the help they need the first time.

It's also important to **evaluate the types of mobile functions needed to support seamless access and smooth transitions in care**. At Baptist Health in Jacksonville, Fla., one of the non-negotiable needs leaders identified for the organization's digital platform was seamless continuity between the health system's mobile offering and their website—and vice versa—to support smooth transitions for patients.

## Measuring The Impact Of Digital Strategy By Operational Goal



Legend:
- All Health Systems
- Health Systems 100–899 Beds
- Health Systems >900 Beds

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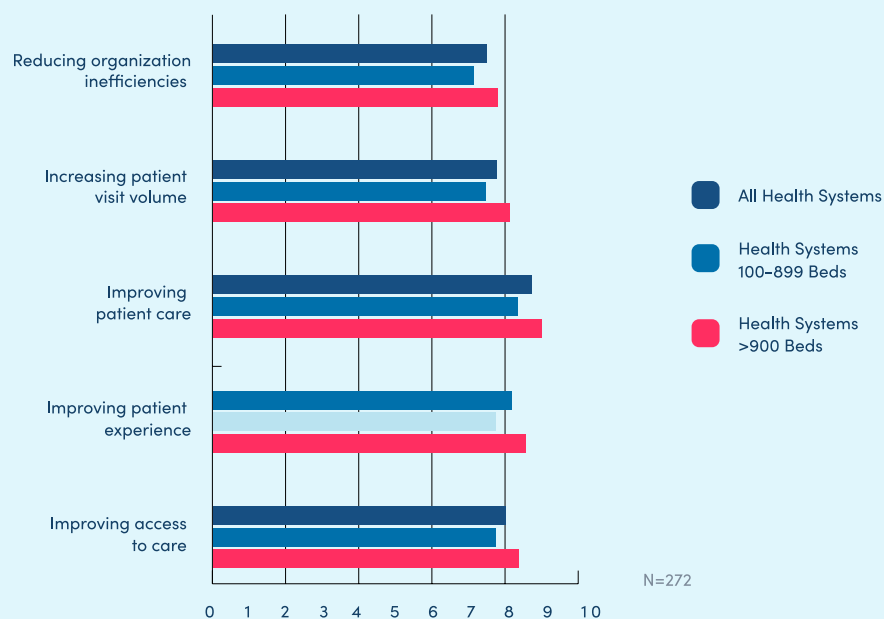
**Digital strategy does not just belong to marketing or patient experience leaders. Departments such as IT, patient access, facilities management, security and risk management may also be stakeholders.**

# Making the Right Moves for Mobile Adoption

The healthcare industry had to pivot quickly at the onset of the pandemic to launch consumer-facing digital tools and initiatives. Now, with the immediate crush of the pandemic largely behind us, health system executives must consider: "How can we take our mobile app strategy to the next level without straining finances or operational resources?"
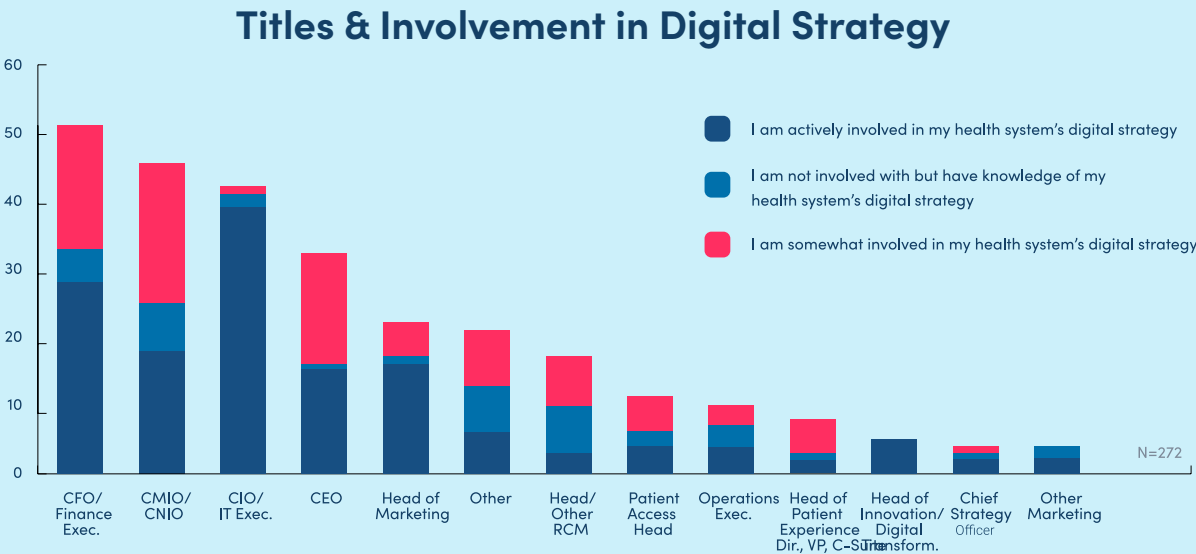
By maintaining a careful focus on consumer preferences, organizational needs and the capacity to provide a seamless digital experience, health systems can create the digital experiences consumers crave while strengthening their ability to execute on strategy, now and long term.

## About The Survey

Gozio partnered with Eliciting Insights to conduct a survey of **272 healthcare executives** with the following titles:

- Head of Patient Experience (Director, Vice President, C-Suite)
- Head of Marketing (Chief Marketing Officer or Vice President)
- CEO
- CIO
- CFO
- COO
- CNO/CNIO
- CMIO
- Head of Patient Access (Vice President or Director)

Half of respondents came from health systems with 900 beds or more. While the respondents' involvement in shaping their organization's digital strategy varied, most were active contributors or had knowledge of their organization's digital strategy (see the exhibit below).

## Titles & Involvement in Digital Strategy



Legend:
- I am actively involved in my health system's digital strategy
- I am not involved with but have knowledge of my health system's digital strategy
- I am somewhat involved in my health system's digital strategy

N=272

Categories (x-axis): CFO/Finance Exec., CMIO/CNIO, CIO/IT Exec., CEO, Head of Marketing, Other, Head/Other RCM, Patient Access Head, Operations Exec., Head of Patient Experience Dir., VP, C-Suite, Head of Innovation/Digital Transform., Chief Strategy Officer, Other Marketing

# About Gozio Heath

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 found 100% satisfaction.

**Request a demo and see Gozio in action: www.goziohealth.com**