



THE STATE OF

Healthcare Communications

A Survey of Healthcare Leaders and Patients

2019-2020
REPORT

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Note from CEO Brad Brooks

Adoption of modern communication technology has occurred in every other industry but healthcare – ironically an industry where it is needed most.

The shocking lack of communication innovation comes at a steep price. The downstream impact is a health system that commonly experiences chronic delays, increased operational costs that are often passed down to the public, physician and nurse burnout, medical errors that could otherwise have been prevented, or at worst case, lead to patient death.

In fact, industry research shows that communication inefficiencies cost a single 500-bed hospital more than \$4 million annually ([NCBI](#)) and communication breakdowns are estimated to be a factor in 70% of medical error deaths ([JMIR](#)). The industry can and must do better to deliver the quality of care patients deserve.

While the industry faces serious challenges when it comes to communication – both among care teams and between patients and providers – the good news is that technology exists to address the problems in a meaningful way that can rapidly lead to improved patient experiences and optimal healthcare outcomes.

The TigerConnect State of Healthcare Communications 2019-2020 report lays out what is broken in healthcare communication today and the downstream impact to healthcare operations and patients. It also offers recommendations, as we believe the right communication infrastructure is at the heart of delivering high-quality care.



Brad Brooks
CEO and Co-Founder
TigerConnect

Executive Summary

Despite the technological advances healthcare has seen in recent decades, the same cannot be said for the methods of communication used in the industry.

Many organizations depend on past-generation tools that are antiquated by today's standards. Further, the majority of organizations understand that healthcare has fallen behind other industries when it comes to utilizing modern forms of communication. This broken state of communication in healthcare has downstream impacts on operations, employee burnout, patient outcomes, and much more. **Key Findings:**



Heavy reliance on outdated technology impacts communication.

90% of healthcare organizations are still using fax machines.



Modern communication technology adoption still lags.

55% of healthcare organizations believe the industry is behind or very behind in adoption of modern communication technology when compared to other consumer industries.



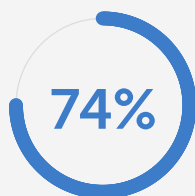
Communication between care team members is difficult.

39% of healthcare professionals surveyed report that it is difficult or very difficult to communicate with one or more groups of care team members.



Communication disconnects negatively impact patients.

The majority of healthcare organizations — **52%** — experience communication disconnects that impact patients daily or at least multiple times a week.



Patients are frustrated by inefficient processes.

74% of U.S. adults who spent time in a hospital in the past two years, because they or an immediate family member were admitted for at least one night, indicated being frustrated by one or more inefficient processes listed.*

*Respondents were asked to select up to three frustrations from a randomized list that included: ability to communicate with the doctor/nurse following the hospital stay, slow discharge/transfer times, limited time with doctor during visit, long waiting room wait times, poor/non-existent follow-up, access to medical records, medical error that impacted me/my family member, lab results took too long, nothing, not sure.

CHAPTER
01

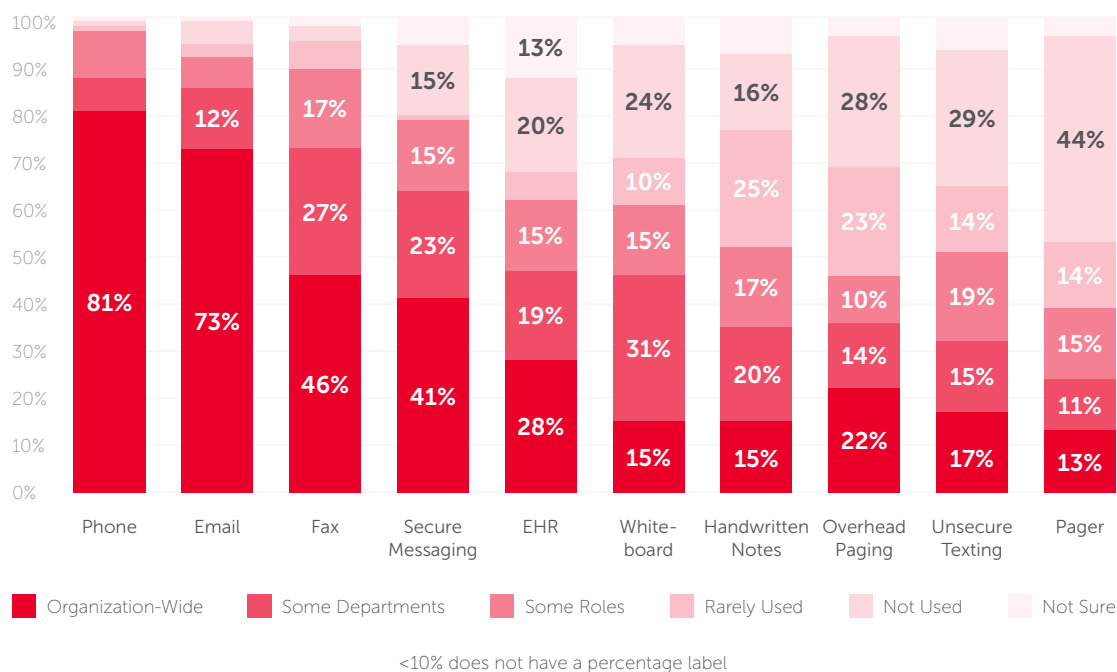
Communication in
Healthcare Is Broken

Communication in Healthcare Is Broken

The healthcare industry still heavily relies on 1970s communication technology, with 89% using fax machines and 39% using pagers among some departments or roles, or even organization-wide.

When examining the most common forms of communication in healthcare, traditional phone calls are the most frequently used organization-wide, followed by email. While neither of those may be particularly surprising, the third most popular form of communication for health systems should raise some eyebrows: fax. While pagers were last on the list of tools used organization-wide, it is still surprising that **39%** of organizations are still using 1970s technology.

Use of Communication Methods



50%

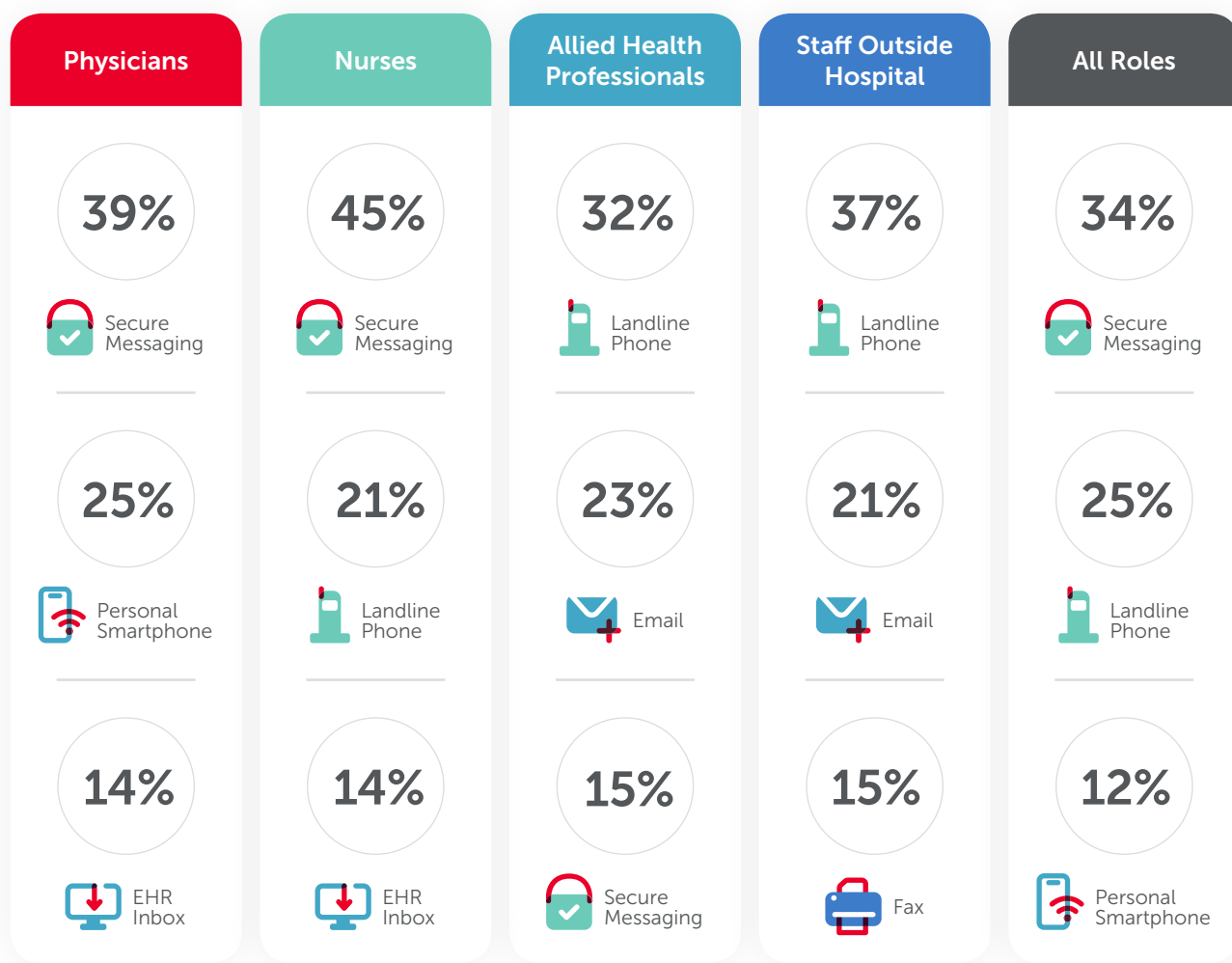
EHR communication was used as much as whiteboards with nearly **50%** of all respondents noting they use both methods organization-wide or in some departments.

Communication channels are badly fragmented, with groups across the health system often using different tools to communicate.

When it comes to the primary communication methods used by healthcare professionals, it depends on their role in the organization. For example, secure messaging is the top form of communication for both nurses (45%) and physicians (39%), while landline phones lead the way for allied health professionals (32%) and staff outside of the hospital (37%).

Additionally, when looking across all roles, 34% selected secure messaging as the primary method of communication, followed by landline phone (25%) and personal smartphone (12%).

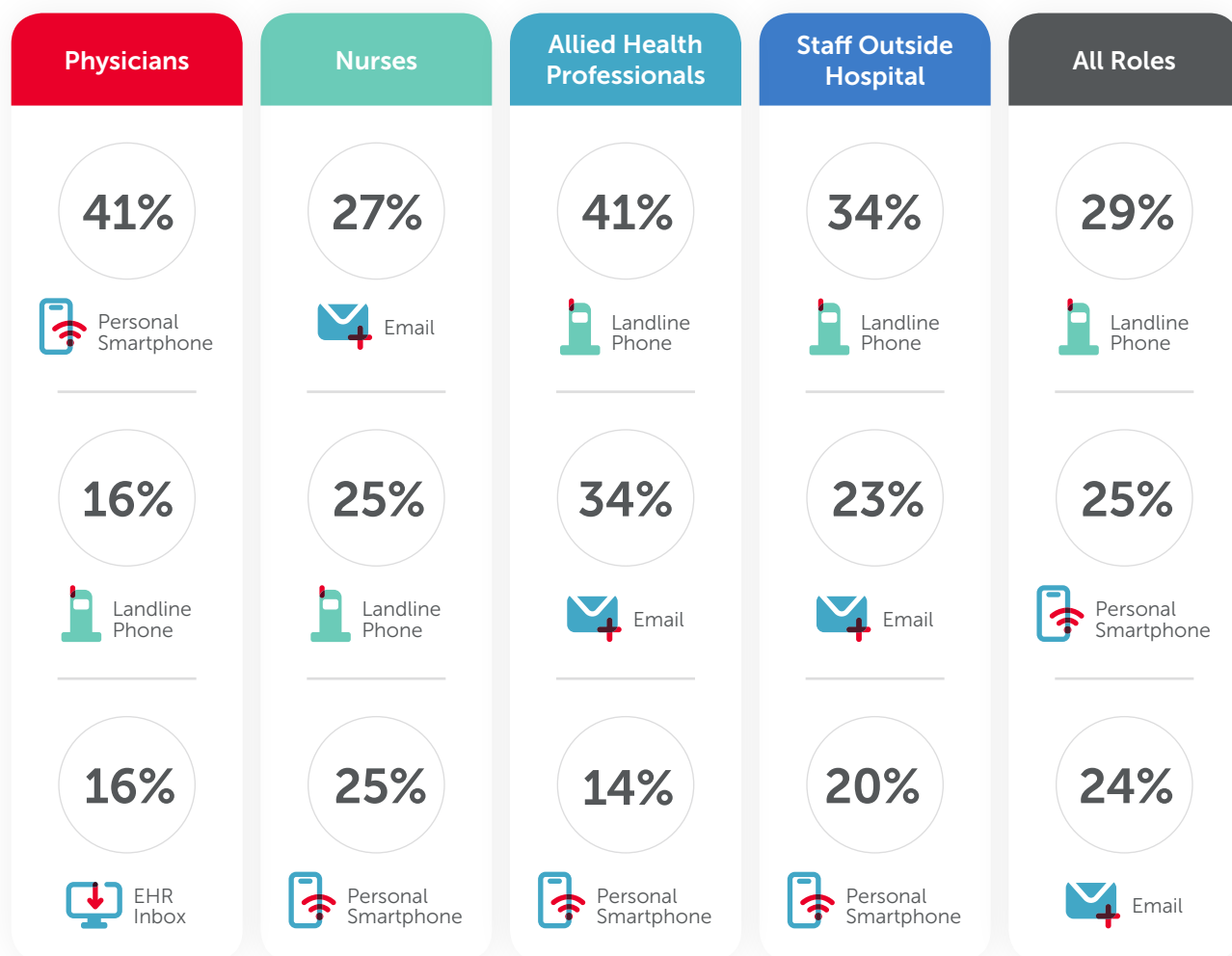
Top Three Communication Methods Used by Each Group



Despite the growing mobile workforce in healthcare – landline phones are the primary choice of communication when secure messaging is not available, used 29% of the time.

Landline phones remain the top communication method for allied health professionals (41%) and staff outside of the hospital (34%), while nurses prefer email (27%). Physicians, on the other hand, rely on their personal smartphones in these situations, with 41% of survey respondents indicating this is the preferred method of communication for this role.

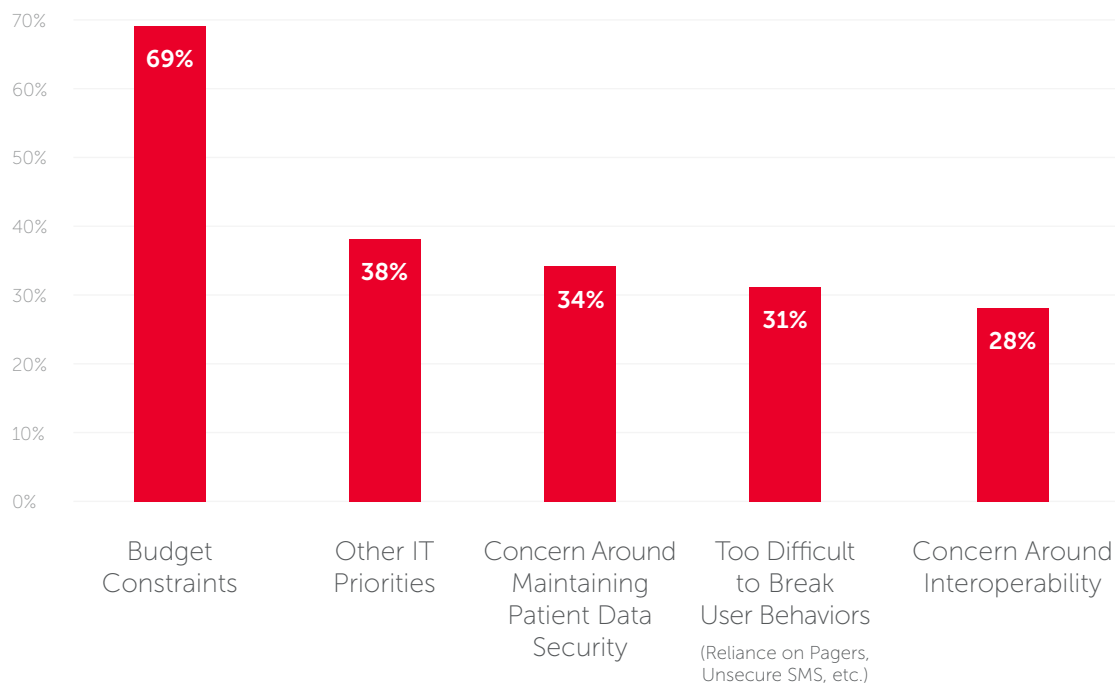
Top Three Communication Methods Used by Each Group When Secure Messaging Is Not Available



Healthcare communication is still not a strategic priority – and budget is a factor.

Effective communication in healthcare is critical to the efficient delivery of quality healthcare across the continuum, yet it continues to lag in terms of priorities. In fact, of survey participants that are NOT using secure messaging, **69% said budget constraints represented their most significant challenge**. This is a clear indicator that many healthcare organizations do not see the connection between improved communication and their strategic priorities.

Top Five Reasons for Not Using Secure Messaging



IMPACT

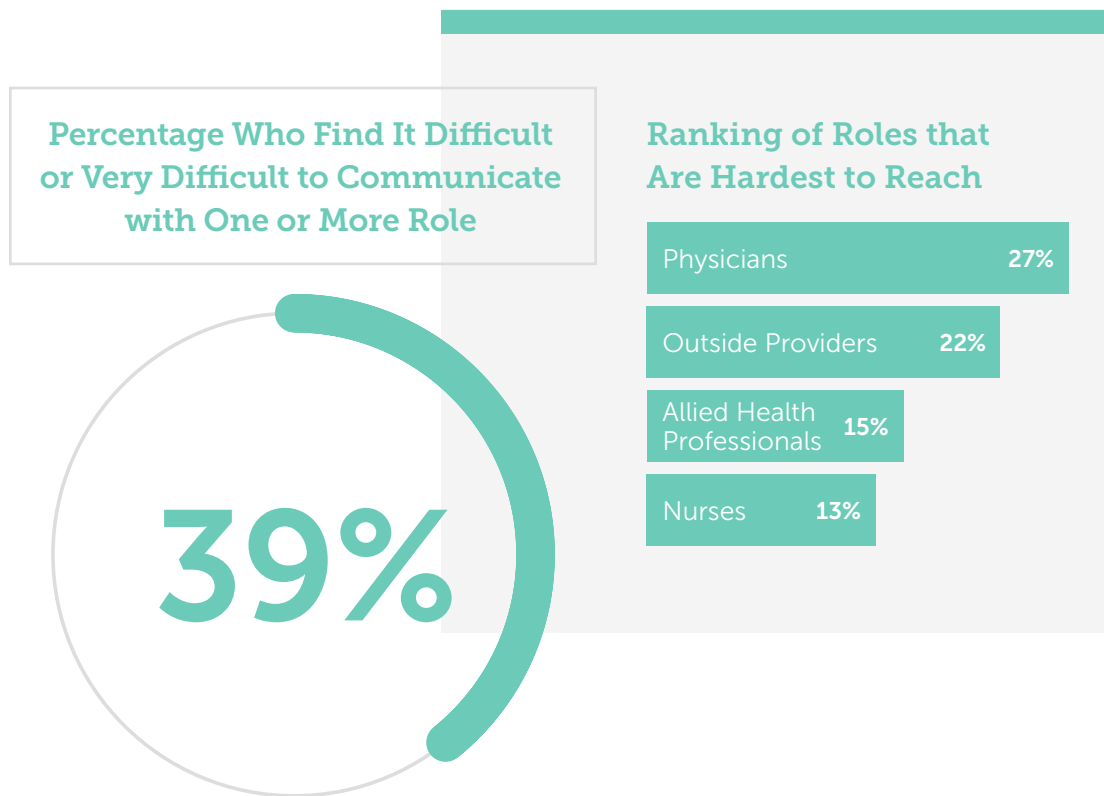
Healthcare Organizations Operate Inefficiently

Healthcare Organizations Operate Inefficiently

Care coordination is difficult, with 39% of healthcare professionals surveyed saying it is difficult or very difficult to communicate with one or more groups of care team members.

Reaching the right person at the right moment is critical to delivering the timely care that patients require. Still, while most understand the importance of timely and effective communication, breakdowns are abundant.


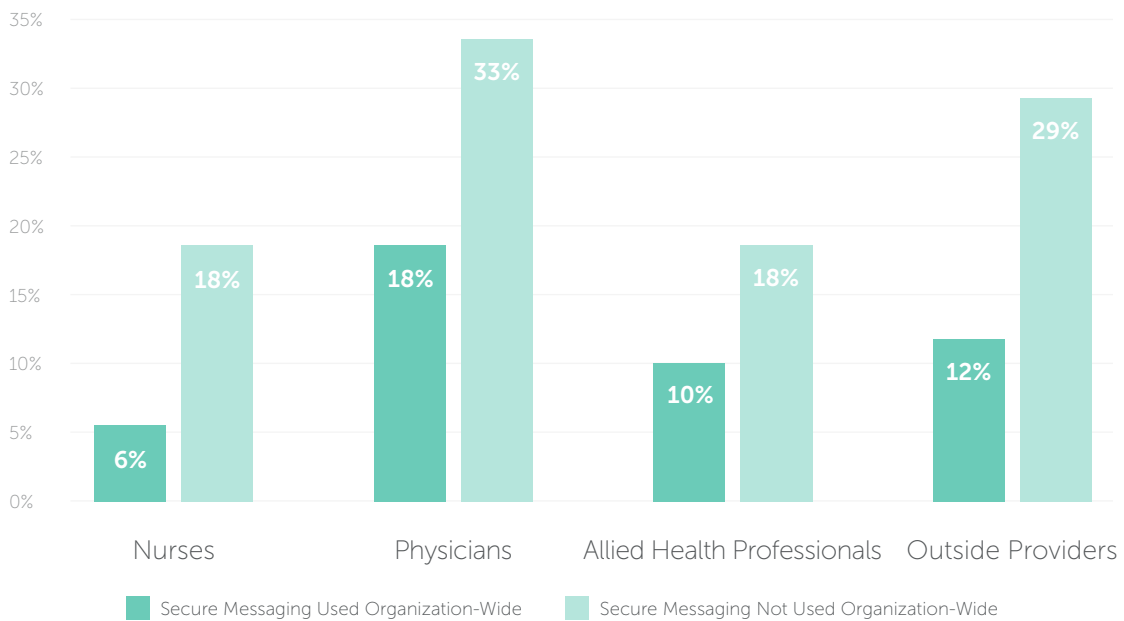
When it comes to reaching specific professionals, physicians are the hardest to reach. Some **27%** of respondents say it's difficult or very difficult to communicate with physicians, compared to **22%** for outside providers, **15%** for allied health professionals, and **13%** for nurses.



Communication is more difficult and lapses in care are more common when secure messaging is not used organization-wide.

Organizations that are only using secure messaging in some roles or departments indicated that communication was more difficult when compared to those using secure messaging organization-wide. The survey also found a **50%** greater likelihood of daily communication disconnects (**21% vs. 14%**) when secure messaging is not used organization-wide.

When Secure Messaging Is Not Used Organization-Wide Communication Is More Difficult

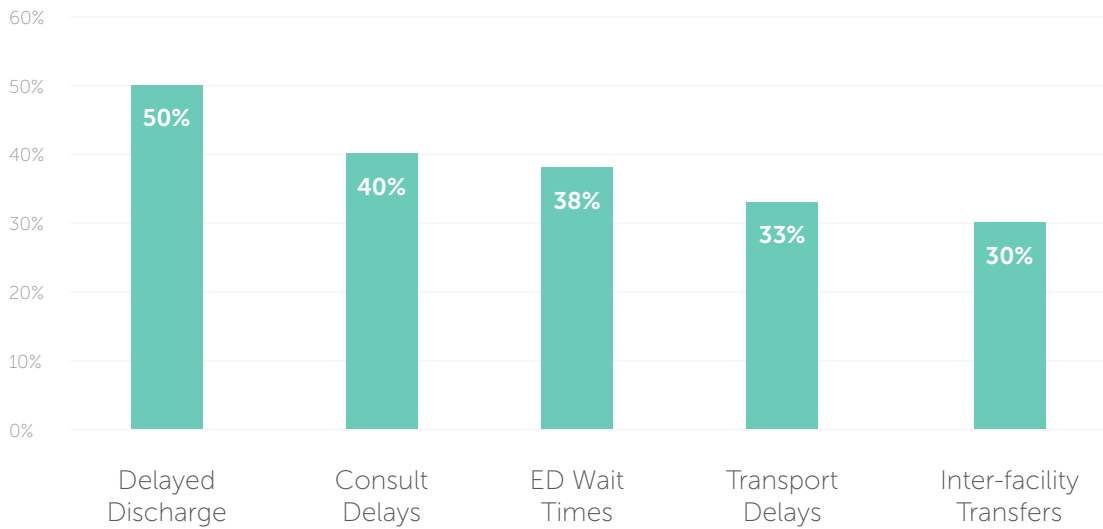


There is a **50%** greater likelihood of **daily communication disconnects** that impact patients when secure messaging is not used organization-wide.

Throughput challenges are present throughout the care continuum due to poor communication.

When it is difficult to reach the right person at the right time, bottlenecks are inevitable. According to the survey, **50%** of respondents cited delayed discharge as the most problematic cause in moving patients through the system, followed by consult delays (**40%**) and emergency department wait times (**38%**). Additionally, the survey indicated a higher frequency of bottlenecks for larger organizations. On average, respondents from larger organizations selected **3.3** bottlenecks out of 5 compared to **2.3** for respondents from smaller organizations.

Top Five Bottlenecks for Moving Patients Through the Health System



The majority of healthcare organizations — **52%** — experience communication disconnects that impact patients daily or at least multiple times a week.

IMPACT

Clinical and Non-Clinical Staff Are Not Aligned

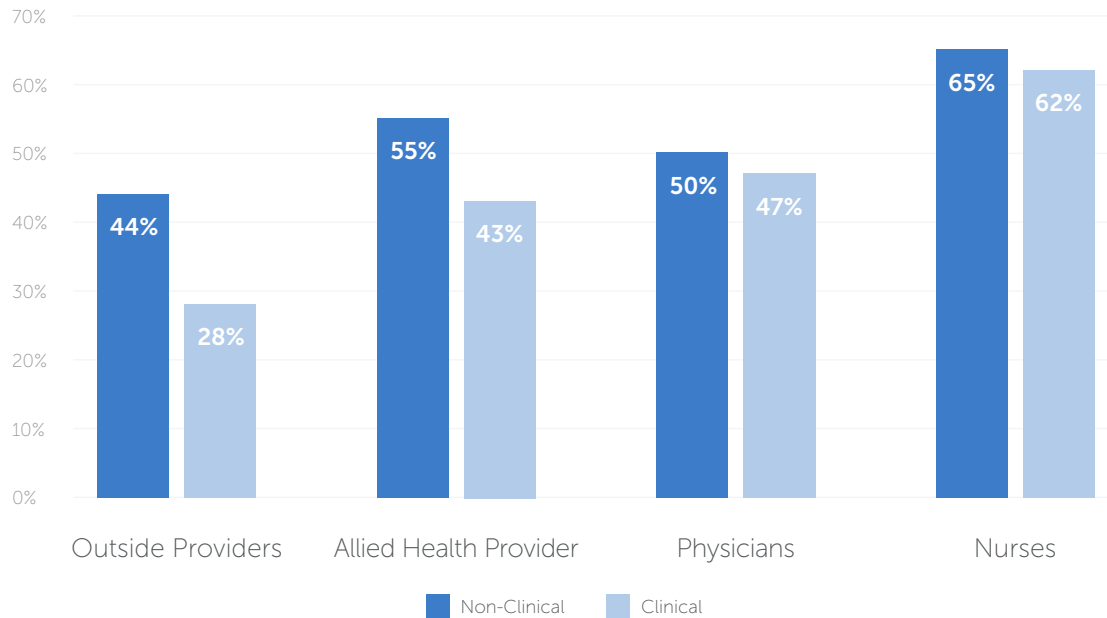
Clinical and Non-Clinical Staff Are Not Aligned

Non-clinical staff underestimate communication difficulties.

Generally speaking, there is a disconnect between clinical and non-clinical staff when it comes to the perception of the industry’s greatest communication challenges.

For example, non-clinical staff were more likely to describe communication with nurses, physicians, affiliate healthcare providers, and outside providers as easy or very easy compared to clinical staff. The largest discrepancy around communication ease was with outside providers.

Percentage Who Rated Communication with Each Role as Easy or Very Easy



7%
Non-Clinical

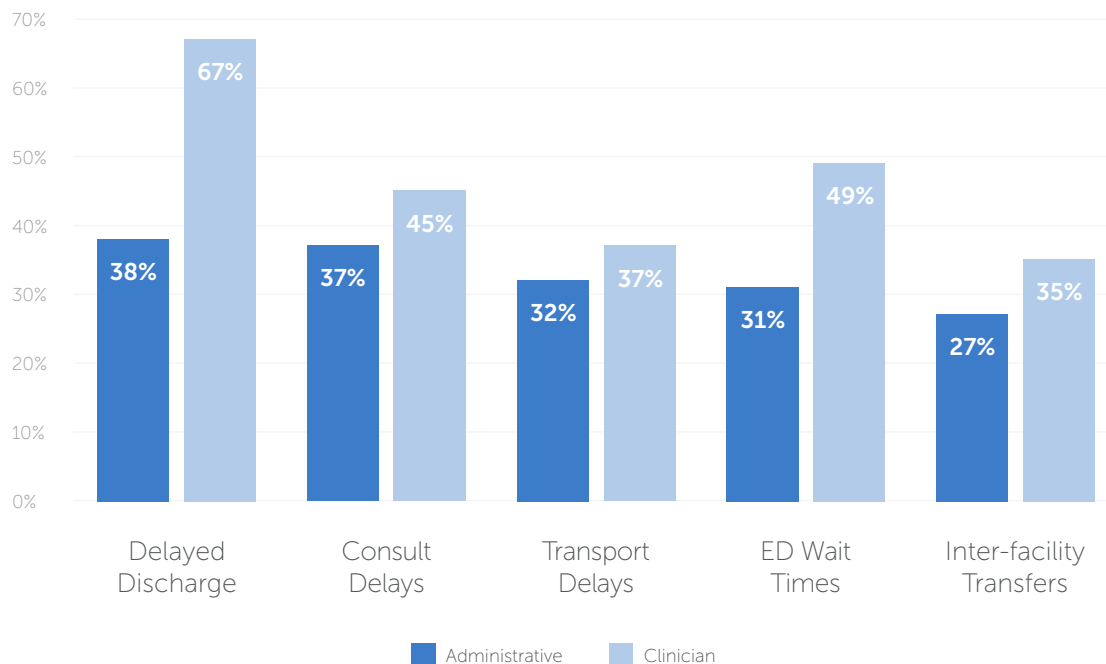
22%
Clinical

Communication Disconnects Impact Patients
Non-clinical staff greatly underestimate the frequency of daily communication disconnects that impact patients.

Non-clinical staff underestimate the impact communication disconnects have on throughput.

While both clinical and non-clinical respondents recognized the various bottlenecks in moving patients through the health system, and ranked them in similar order, clinical respondents cited them at a much higher rate. For example, both cited delayed discharge as the most common bottleneck, but **67%** of clinical respondents said so compared to just **38%** of non-clinical respondents.

Top Five Bottlenecks for Moving Patients Through the Health System – Non-Clinical vs. Clinical



Clinical respondents selected **3.2** out of five possible bottlenecks, while non-clinical respondents selected an average of **2.4** out of five.

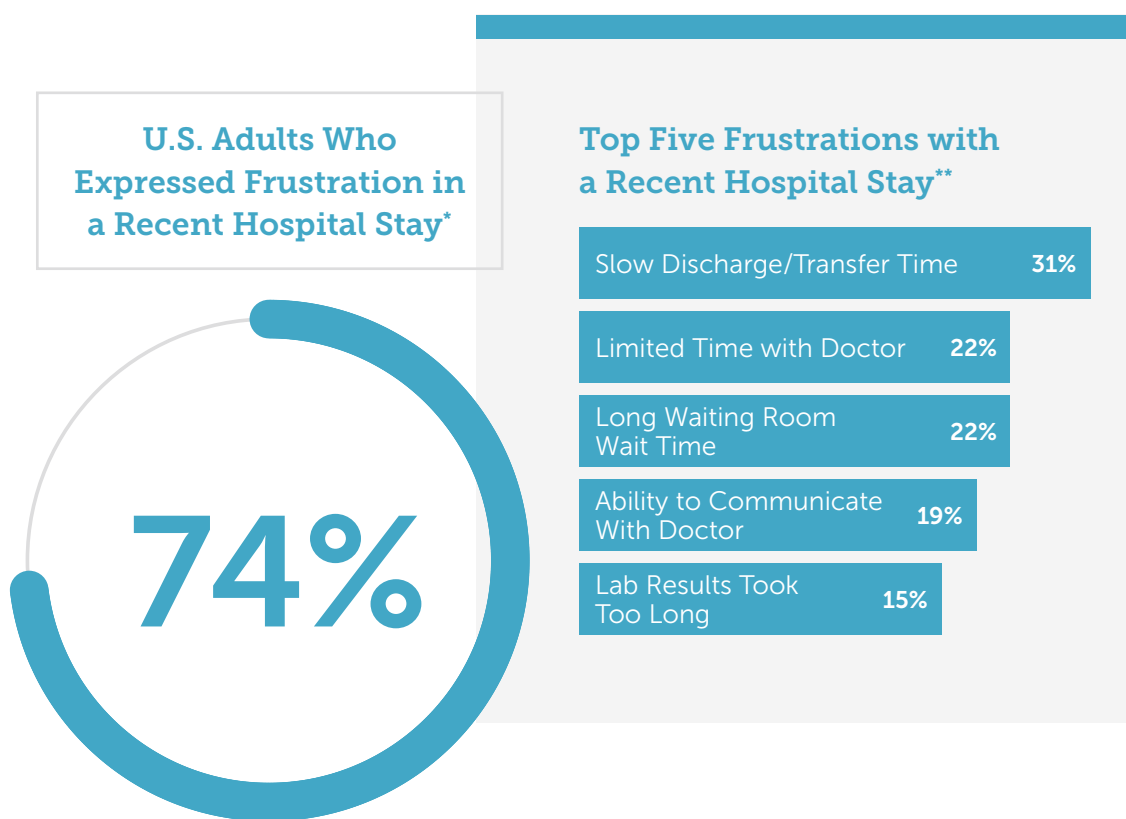
IMPACT

Patients Are Taking Notice

Patients Are Taking Notice

Most patients were frustrated by a recent hospital stay. 74% of U.S. adults who spent time in a hospital in the past two years indicated being frustrated by one or more inefficient processes listed.*

Anyone who has had a doctor’s appointment in recent years knows the variety of frustrations that can arise. When Americans, who spent time in a hospital in the past two years because they themselves or an immediate family member was admitted to the hospital and stayed at least one night, were asked directly about their top frustrations with a recent hospital stay — **31% cited slow discharge and transfer times as a top frustration**. The next most common frustrations were — limited time with their doctor during the visit (**22%**), and long waiting room time (**22%**).



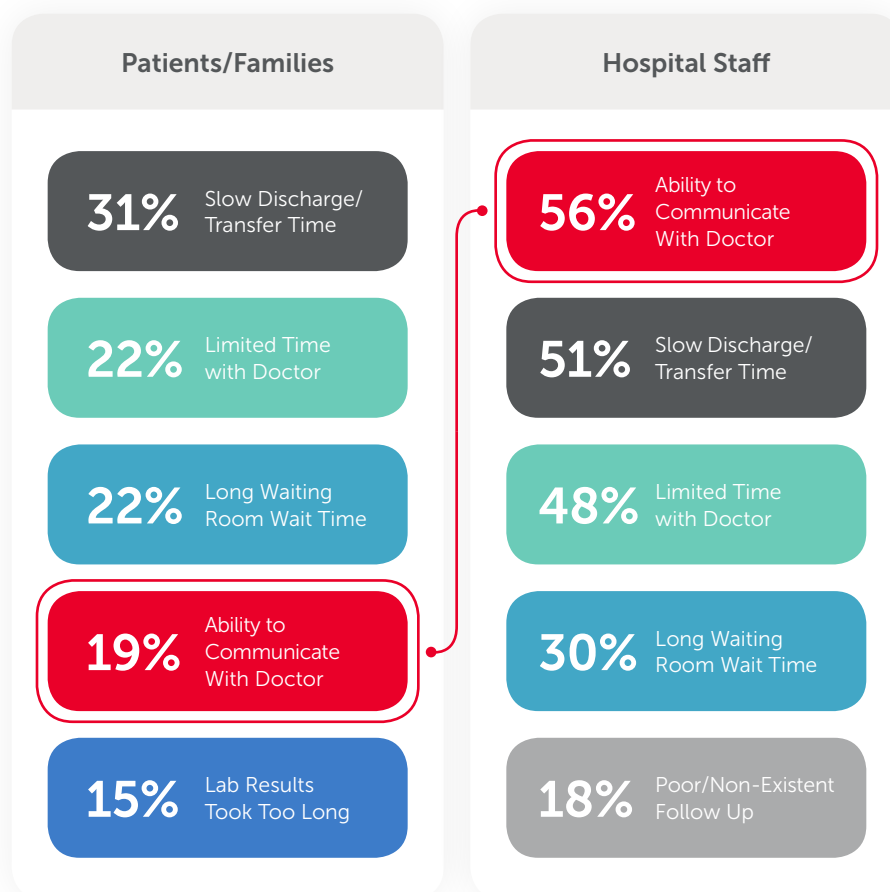
*Respondents were asked to select up to three frustrations from a randomized list that included: ability to communicate with the doctor/nurse following the hospital stay, slow discharge/transfer times, limited time with doctor during visit, long waiting room wait times, poor/non-existent follow-up, access to medical records, medical error that impacted me/my family member, lab results took too long, nothing, not sure.

**U.S. adults who spent time in a hospital in the past two years because they themselves or an immediate family member was admitted to the hospital.

Patients are more frustrated by inefficiencies during the hospital stay and less concerned about communication with their doctor before and after the visit.

Survey findings indicate that healthcare leaders underestimate patient frustration by delays and inefficiencies in a recent hospital stay. To alleviate the top patient frustrations, healthcare leaders should focus first on improving communication across the health system.

Top Five Frustrations for Patients/Families vs. Hospital Staff Perceptions

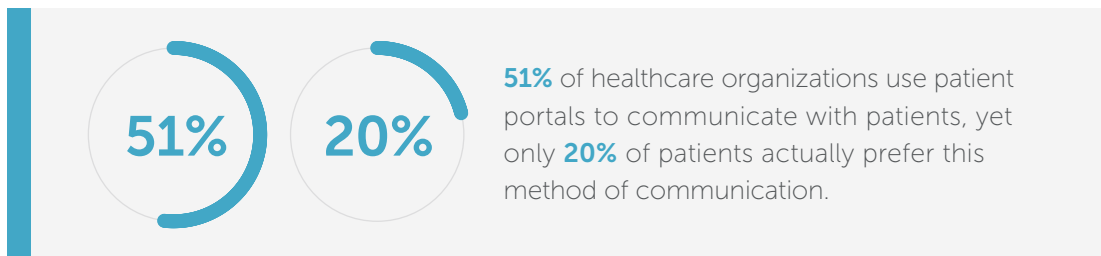


Patients' preferred communication method doesn't match what is actually being used.

When considering patients' preferred method of communication, patient portals, postal mail, and phone seem to be overutilized, and email and text/SMS seem to be underutilized. Patient portals saw the widest gap with **51%** of healthcare organizations indicating they use patient portals to communicate with patients, yet only **20%** of patients actually prefer this method of communication.

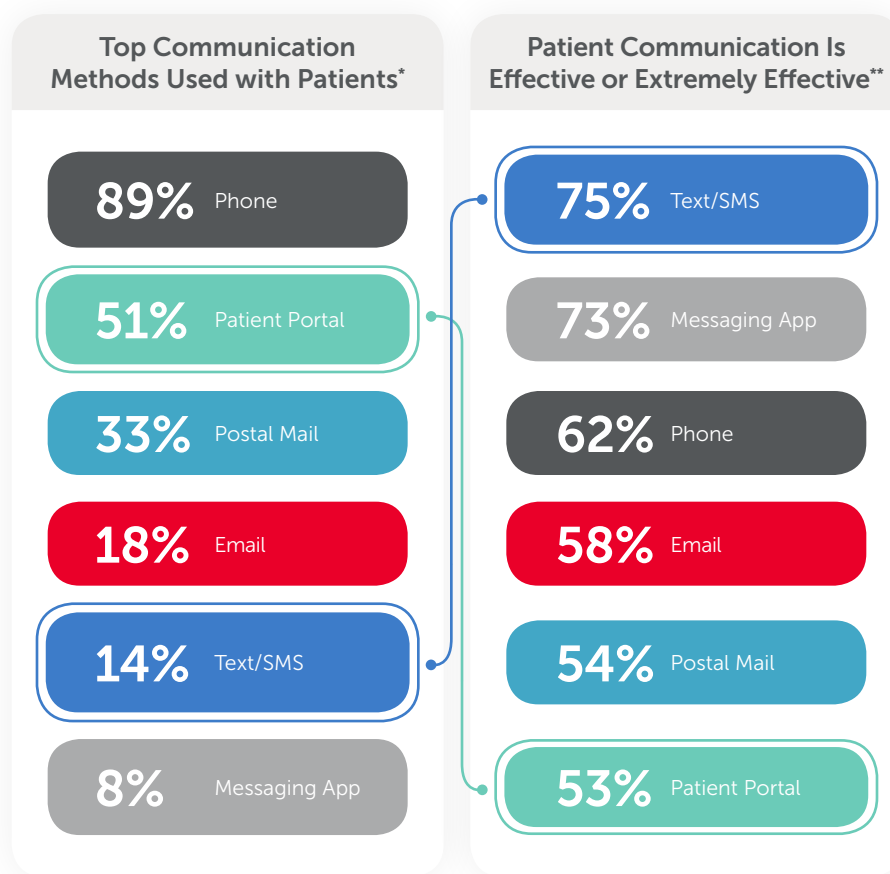
Communication with Patients - Actual vs. Preferred

Method of Communication	Used by Healthcare Org	Preferred by Patients	Over/Under Utilized
Patient Portal	51%	20%	-31%
Postal Mail	33%	9%	-23%
Phone	89%	69%	-20%
Messaging App	8%	8%	+1%
Email	18%	22%	+6%
Text/SMS	14%	18%	+6%



Patient Portals linked to inefficient patient communication.

Other than traditional phone calls, patient portals were the second most used method of communication with patients before and after a hospital stay. However, organizations using patient portals as a top method of communication were **29%** less likely to rate their communication with patients as effective or very effective when compared to those using text/SMS as a top method of communication. Text/SMS was one of the least-used methods of communication, but those who chose it as a top method of communication were the most likely to believe their communication was effective or very effective.



*Percentage who use each communication method with patients.

**Percentage who rated communication with patients as effective when each method was used.



38% of healthcare organizations said they are not effective or only slightly effective at communicating with patients before and after a hospital stay.

CHAPTER
02

**Six Recommendations to Modernize
Healthcare Communication**

Six Recommendations to Modernize Healthcare Communication

01

Prioritize Communication as a Strategy

Many healthcare organizations simply fail to realize that **communication plays an essential role in every strategic priority** they are looking to achieve. Effective communication can help alleviate employee burnout, reduce medical errors, drive efficiencies in care delivery, improve patient satisfaction, and much more. For any healthcare organization looking to drive meaningful transformation, communication has to be a critical competency.

02

Focus on Improving Communication Around Top Bottlenecks

Communication is often the common thread binding each transition of care together. Take the time to identify and break down the communication bottlenecks that cause delays and impact the quality of care delivery in your organization. And consider that **every minute saved means life-saving interventions can be performed sooner**. Here are two real-world examples:

Reduction in Transport Time

Westchester Medical Center Health Network in New York used TigerConnect to help rapidly mobilize their entire transport team, saving an average of **13.3 minutes** on transports between facilities, with **72%** of hospitals improving by at least **11 minutes**. The maximum average time reduction at one hospital was **34 minutes**.

Near Real-Time Delivery of Critical Lab Values

Geisinger Health System in Pennsylvania cut down the time to deliver critical labs from **12 mins** to **2.5 minutes**. To achieve this they integrated TigerConnect with their lab system, routing real-time alerts to the appropriate caregivers for any lab results that meet a critically high threshold.

03

Integrate Your Communication Platform with Your EHR to Extract Massive Value

Most health systems have invested heavily in electronic health record (EHR) systems, which make secure patient information available to authorized users. An effective and connected care strategy should not only connect people in all corners of a health system, but also connect systems.



An **organization-wide communication platform that integrates with EHRs puts patients at the center of the care experience** and can provide detailed alerts around admissions, discharges, transfers, and overall care team management.

04

Standardize Communication with One Organization-Wide Platform

When a secure communication solution is used organization-wide, **health systems experience a network effect** that accelerates efficiency and leverages economies of scale.

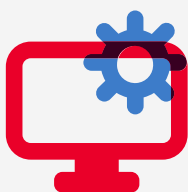


Access to their entire health network from the palm of their hand allows staff to find a specialist, nurse, care coordinator, or outside service provider, and begin communicating with just a few taps.

05

Include Clinical Leadership in Solution Design

Non-clinical staff underestimate the extent of communication difficulties and the impact on patient throughput.



This finding suggests a need for **clinical leaders to be more involved in technological solutions and the implementation of those solutions** in order to truly solve communication challenges.

06

STOP Using Patient Portals for Patient Communication and START Incorporating Patient Messaging into Your Overall Communication Strategy

Patient portals, while helpful for sharing patient record data, appear to be less effective for communicating with patients when compared to SMS/text. A more effective way to keep in touch with patients is to deliver pertinent information before, during, and after hospital visits via secure text-based communication.



A full 81% of Americans own smartphones, making communicating via secure, integrated SMS an easy, timely, and effective way to help patients stay on top of their own care.*

*Pew Research Center

CHAPTER
03

Methodology and
Sample Characteristics

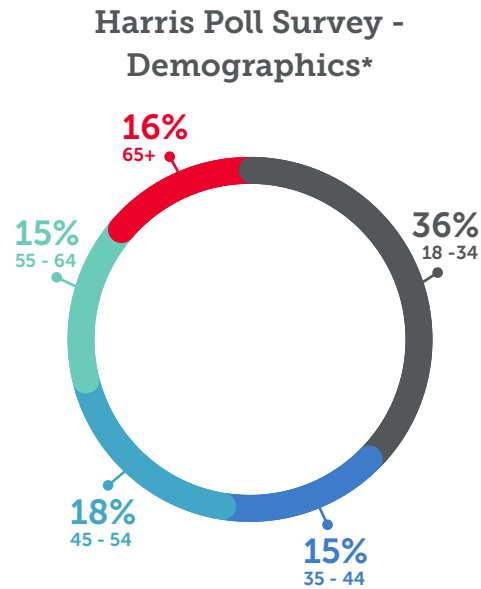
Methodology and Sample Characteristics

To better understand patient preferences and expectations around communication, a survey was conducted online within the United States by The Harris Poll on behalf of TigerConnect.

A survey from August 26-28, 2019 among 2,014 U.S. adults ages 18 and older, of whom 870 have spent time in a hospital in the past two years because they have or an immediate family member had been admitted and stayed at least one night.

This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables and subgroup sample sizes, please contact Alyssa Trenkamp at atrenkamp@tigerconnect.com.

- Respondents who met the qualifying criteria were fairly evenly mixed by gender - **45% male and 55% female**.
- In addition, a large portion of respondents were in the young adult demographic between the ages of **18-34 (36%)**, and the next largest demographic were adults between the ages of **45-54 (18%)**.

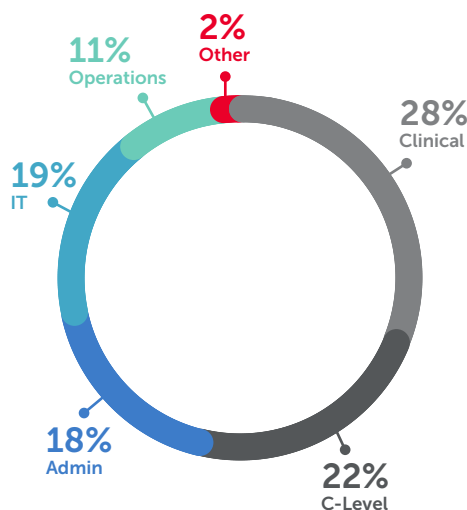


*Demographic data of respondents who indicated they spent time in a hospital in the past two years because they or an immediate family member were admitted and stayed at least one night.

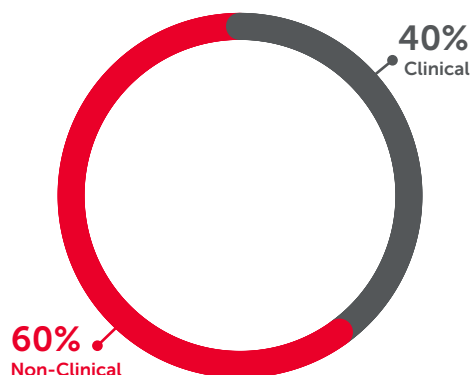
To better understand healthcare organizations' opinions on the state of healthcare communications, TigerConnect conducted an online survey from July 15-31, 2019 with nearly 200 respondents who work in the healthcare industry.

- Healthcare employees were surveyed from a wide range of roles including **28%** clinical workers (nurses/doctors/ancillary providers), **22%** C-level participants, **19%** IT professionals, **18%** administrative staff, **11%** operations, and **2%** other.
- The mix of clinical versus non-clinical respondents was well proportioned, with **40%** of respondents in clinical roles and **60%** in non-clinical roles.
- The majority of healthcare respondents work in a hospital (**37%**) or health system (**27%**), while other organization types represented were ambulatory (**13%**), hospice (**8%**), home health (**7%**), and subacute care facilities (**6%**).
- Organization size was mixed, with **47%** of respondents indicating their organization had more than 1,000 employees and **53%** indicating their organization had fewer than 1,000 employees.
- It is also important to note that the healthcare organizations surveyed were more sophisticated in their use of clinical communication, with more than **78%** indicating they use secure messaging within their organizations.

Healthcare Organization Survey Role and Title



Healthcare Organization Survey – Clinical vs. Non-Clinical Respondents





As healthcare's most widely adopted communication platform, TigerConnect uniquely modernizes care collaboration and communication among doctors, nurses, patients, and allied health professionals.

Trusted by more than 6,000 healthcare organizations, TigerConnect maintains 99.99% verifiable uptime.

To learn more about TigerConnect, visit www.tigerconnect.com.