

2023
Healthcare
Consumer
Engagement
Forecast



Table of Contents

04 Introduction

06 Prediction 1

Inflationary pressures will continue to pressure health care consumers and organizations

08 Prediction 2

The healthcare labor shortage won't abate and will require innovative solutions to fill gaps

09 Prediction 3

Consumerism only grows in importance

12 Prediction 4

Digital meets personal

14 Prediction 5

Healthcare should prioritize customer experience to boost loyalty

18 Prediction 6

Health equity and social determinants of health

21 Prediction 7

Behavioral health

22 Conclusion

23 References



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2023 Healthcare Consumer Engagement Forecast

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Introduction

Inflation. A labor shortage. Rising consumer expectations.

Digital transformation impacting an industry historically averse to change. Health equity in jeopardy. A behavioral health crisis, especially among the young. CMS Star Ratings' methodology changes. Hospitals and health systems suffering huge losses and standing to lose billions of dollars more. Regulators challenging conventional wisdom.

The healthcare industry is facing some serious headwinds in 2023.

Just as the COVID-19 era is starting to recede slightly, shifting from a pandemic footing to an endemic occurrence, the threat of inflation has emerged, causing cost challenges industry-wide.

Right when people who had held off on elective care are starting to return to the health system, they're finding a workforce that is chronically understaffed and exhausted.

The industry is facing demographic changes. A rising sense of consumerism. Higher expectations around customer service. Increasing needs for behavioral health, and more calls (and oversight) around health equity.

Increased demand for digital services, which can offer great

promise but often require human management to make the most of the tech.

Add in recent changes to the CMS Star Ratings' scoring methodology that sunsetted pandemic-era criteria and drove many plans' scores downward.

It's a lot. But in every crisis lies an opportunity. For healthcare, this is a time to assess:

- What's the future we're working toward?
- How are we meeting the needs of health consumers at this moment?
- How are we fulfilling obligations to stakeholders?
- What should we prioritize as we move past the COVID-19 pandemic?

The organizations that figure these questions out will win this transformational moment in time.

Based on these interconnected changes and stressors throughout the healthcare space, we're forecasting the following trends to have major impacts on the industry in 2023.



Our 2023 Predictions

Prediction 1

Inflationary pressures will continue to pressure health care consumers and organizations.

Inflation dominated business news headlines in 2022, as rising prices bit into the budgets of consumers and companies alike. These impacts will continue to be felt in 2023. The numbers tell the story:

- Prices for medical care increased by **5%** in October 2022 over the previous year while overall consumer prices grew by **7.7%**.
- About **4 in 10** American adults reported having difficulty affording health care costs.
- Americans between the ages of **50–64** who have increasing healthcare needs but are too young to qualify for Medicare are feeling the pinch in particular.

- One study found that **41%** of Americans reported having debt due to medical or dental bills. ¹
- In a survey of healthcare leaders, many expected inflation to hurt growth, with predicted drops in margins of 25–75%. ²

For the consumer, inflation creates a swirl of negative emotions: **confusion, anxiety, fear.**

“People are afraid...[Inflation has] a pretty profound effect on everybody’s purchasing habits and priorities.”

Carenet Health CEO John Erwin



Scarcity and ambiguity change consumer behavior, even with everyday expenses like gas prices. Consumers are worried about “not knowing what’s around the corner,” Erwin explained.

Fear of the financial unknown will continue to exacerbate the deferred care crisis as consumers become extra careful with health spending. “People will look at the tremendous number of health care recommendations, and they will forgo that care,” he said.

For payers and providers, inflation means threats to the bottom line. It’s staggering, really. In 2022, U.S. hospitals faced billions of dollars in losses and some estimates report that more than two-thirds of hospitals had negative margins.

Next year may be just as difficult. Fitch Ratings is projecting “a very bumpy 2023”³ for the hospital industry. Many healthcare leaders are bracing for a continued sharp decline in operating margins in 2023, and hospital closures and bankruptcies loom on the horizon.⁴ And 55% of healthcare CEOs believe inflationary pressures will last until mid-2023 or beyond.⁵

In some scenarios, anticipated cost increases are expected to reach companies and consumers, making medical coverage more expensive.⁶

So how can healthcare organizations fight back against inflation, while continuing to serve the consumer’s needs? Here are some suggestions:

Prioritize consumer experience.

By emphasizing patients and members, organizations can build and grow trust, which leads to better retention, higher feedback scores, and better health outcomes.

Address system inefficiencies.

Consider fortifying rural health capacity, driving urban anchor hospitals, streamlining supply chains, and developing talent pipelines.⁷

Train and retain staffers.

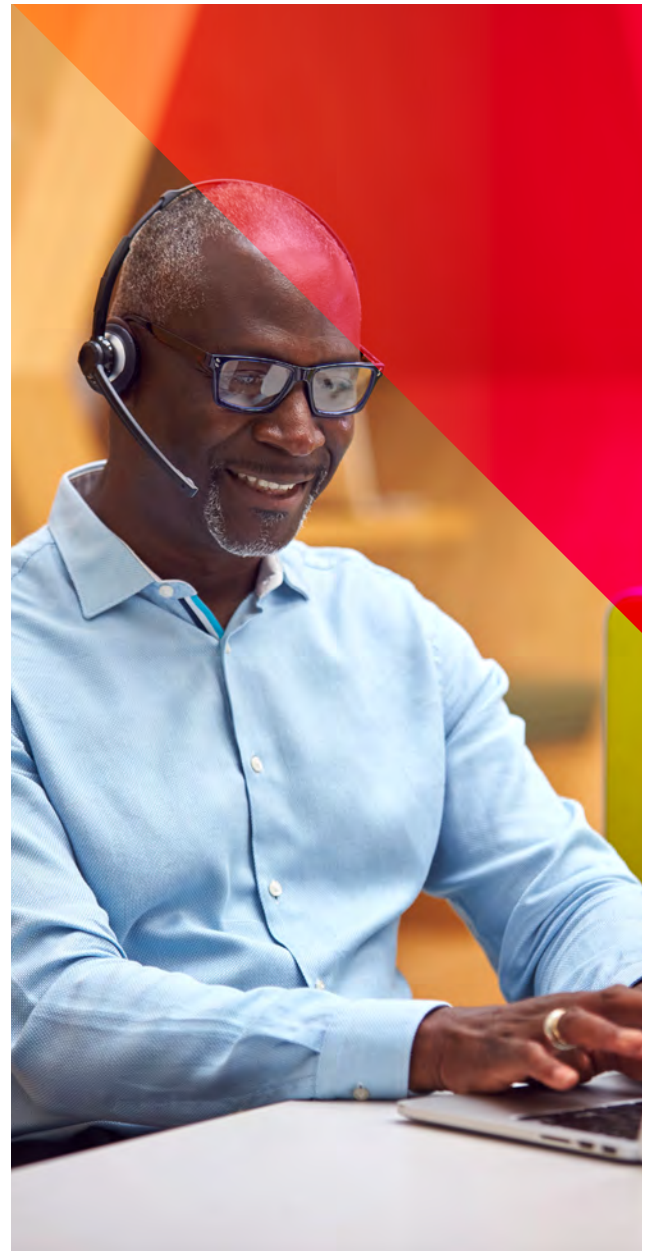
Provide opportunities for an overtaxed workforce to build valuable new skills.

Reconsider site of service.

New digital tools make options like ambulatory surgery centers and home healthcare more accessible.

Put people first.

It’s been a traumatic few years in healthcare for members, patients, staffers and providers alike. Keep building the trust that will pay off in lifetime customer value.



Prediction 2

The healthcare labor shortage won't abate and will require innovative solutions to fill gaps.

The labor shortage in healthcare has reached acute levels. Exacerbated by the pandemic and fueled by an exodus of nurses and other employees,⁸ the healthcare workforce is facing a dearth of workers. For example, 29% of responding RNs in one study said they were likely to leave their current roles.⁹

The pandemic had a major impact on staffing shortages because it helped to drive healthcare workers into retirement at a faster rate than anticipated. But the pandemic alone isn't to blame for the labor shortage. Burnout existed in the healthcare space pre-pandemic,¹⁰ taking its toll on doctors and clinical staffers. On the administrative services side, lower wages, long hours and perceived lack of advancement opportunities have placed further strain on the healthcare workforce. An aging population coupled with a nursing faculty shortage created a supply-and-demand gap.¹¹ "Before the pandemic, we were 400,000 nurses short in this country," says Erwin.

And it's not just nurses. Clinicians are stressing the need for a complete transformation of the care model and more investment in technology¹² to better free their time. Staffing levels at nursing homes and community care facilities also remain significantly lower than pre-pandemic levels.

In the era of the Great Resignation, employees are opting out, causing the healthcare ecosystem as a whole to struggle with headcount shortages.

Adding a new wrinkle for 2023? Increased demand for elective healthcare services, as the general population resurfaces from the bunker mentality of the COVID era and starts asking about all those deferred care treatments that they'd skipped. They're finding a workforce that's not exactly set up for peak demand.

"Everybody's kind of reemerging and saying 'My knee's a little creaky. I might need a new hip... and they're walking into a stressed-out group that was already undermanned.'"

Carenet Health CEO John Erwin

Healthcare is facing a perfect storm of increased demand and constrained resources in the wake of a generational health crisis. "The reemergence of the consumer combined with the lack of clinical and health care providers and systems of care is a stunning combination," Erwin said. "That's going to have lingering effects."

Filling the labor shortage will require new ways of looking at the traditional staffing model, including:

- Hiring highly skilled offshore nurses and clinicians at advantageous price points.

- Finding technical solutions that help stretch the workforce, like the “telesitting” program in place at Henry Ford Health System that uses bedside cameras and speakers to assist nurses virtually.¹³
- Developing pathway programs from schools into health systems that can start at the community college level and provide a road to employment to help fill care gaps in rural areas.¹⁴
- Creating apprenticeship programs that fill skill and talent gaps for medical assistants.¹⁵
- Identifying medical gig economy platforms, where facilities can find traveling nurses who can provide temporary staffing help in times of need.¹⁶
- Establishing internal staffing agencies that create centralized talent pools and tackle retention issues by offering paths for advancement to their own people.¹⁷
- Empowering patients, such as letting them order their own food using iPads rather than assigning a hospital employee to handle this task.¹⁸

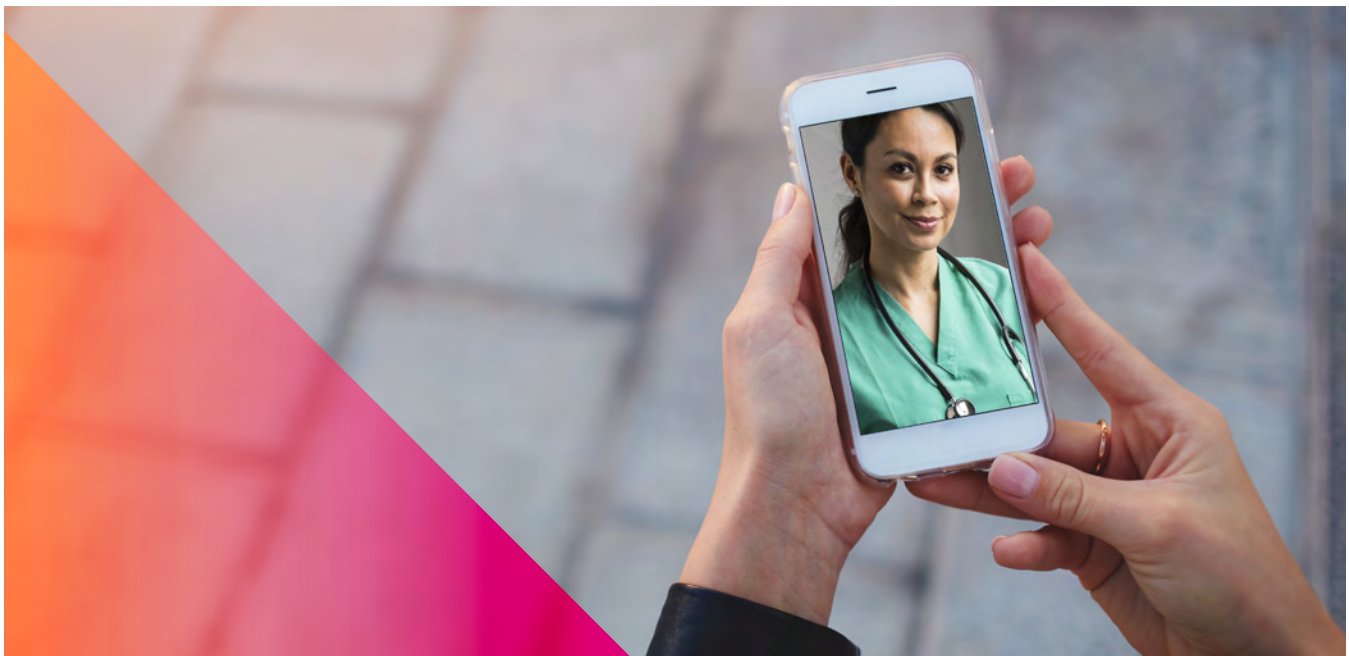
One idea for plans and providers? Rethink their geographical footprint. “They’ve all realized they probably will have to

employ labor elsewhere in the country,” said Carenet Health President Mick Mazour.

With the rise of telemedicine options, sometimes these resources are located abroad.

“There’s a way to connect to a very highly skilled laborer somewhere else in the world to provide services to you,” Mazour explained.

And offshore workers can provide very respectable levels of subject matter expertise while lowering overall labor costs. For example, organizations can fill labor gaps by hiring highly trained offshore nurses to support members and patients with high-quality service. “All of a sudden, you’re saving a tremendous amount of money, and you’re taking care of that engagement with that patient with a nurse,” Mazour noted.



Prediction 3

Consumerism only grows in importance.

Webster's defines consumerism as "the promotion of the consumer's interests."

This buzzword in business circles has taken on increased significance in healthcare during an era of rising customer expectations and demographic change.¹⁹

Yes, the customer is always right. But now, consumers are setting the bar higher than ever with their expectations around customer service. Empowered by reviews sites, surveys and social media feedback loops, consumer voices are more amplified publicly. Their range of choices in the market have expanded, too.



The shift is challenging some well-established industry norms in healthcare, a field that hasn't always been known for embracing rapid change. "Healthcare moves at snail's pace," said Mazour.

Historically, the industry has often minimized the importance of customer experience and deprioritized consumerism. Additionally, plans and providers have asserted more control in dictating terms for how patients and members go down certain paths, creating a bit of a "do it my way" mindset.

But times are changing. "They're finding out they're not going to get away with that anymore," Mazour noted.

Today's consumers want something different. Something better than the old way. Appreciation. Personalization. Transparency. A trusted connection with their care providers. High-frequency touchpoints and value-added healthcare services.²⁰ And a broader set of tools and tactics to help them access care more efficiently.

It's forcing plans and providers to consider how they can better serve this evolving consumer need. "They're all having to step up their game, to meet the demands of that consumer," Mazour explained "That consumer has more leverage today than even two years ago pre-pandemic, and certainly five years ago. These demand factors are forcing every company right now to figure out how to make that customer be appreciated, how to make that customer feel wanted."

One key: think of consumers less transactionally and more in terms of lifetime customer value.

Healthcare costs, quality and convenience will be driving forces along with appreciation for consumerism²¹ in healthcare.

Given the expanding roster of players in the healthcare space, from health-tech startups²² to megacorporations,²³ it's critical to adopt consumer-centric engagement models and efficiency-boosting technical tools that will help meet consumer expectations.

Understanding the preferences of the millennial generation—the largest adult generation in America today—is another core factor, particularly regarding their changing perceptions of an industry legacy: primary care.

“Industry pundits keep pushing that primary care is the secret,” said Carenet Health’s Executive Vice President of Strategy Steve Harstad. Steve. “They’ve become outdated in their approach.”

For many millennials, a regular visit to see their doctor is less important; they just don't see the value in the traditional primary care model.²⁴

Another disconnect between millennials and healthcare? Trust. One study shows 37% of people between the ages of 25-34 don't trust their providers.²⁵ Addressing that lack of trust will be critical moving forward.

“Consumerism will continue to grow... Underneath consumerism, there are huge, huge undertones of trust. Trust in channel, trust in reliability and credibility.”

Chief Strategy Officer Steve Harstad

Also key? Simplicity, convenience and personalization, which Harstad believes are crucial to being able to unlock true consumerism.



Prediction 4

Digital meets personal.

We live in a digital world, and healthcare is no exception. From telehealth to remote patient monitoring²⁶, AI-enabled triage²⁷ to digital front-door patient engagement platforms,²⁸ technological innovations are reshaping ways to deliver care and reframing consumer expectations. The new universe of digital health is leading a shift away from traditional healthcare models.²⁹

Patients and members have spoken. They want tools like chat messaging, personalized videos and wearable devices integrated with real-time support.³⁰

About 40% of respondents to one survey said they'd continue to use telehealth³¹ going forward—compared to 11% usage prior to COVID-19.

What do consumers also want? Simplicity. They're not so concerned about the hows and whys—they just want their health experiences to be seamless and efficient.³² Here's where digital health solutions show great promise. But will digital alone solve all of healthcare's problems?

The reality is that for all of the promise of digital health technology, it's not a universal solution. Tech alone can't fix everything. "Digital isn't going to be for everybody," Mazour explained. "Digital isn't going to meet every need. There are certain things that just can't be done digitally. It's imperative that we continue to provide choices that meet everybody's needs."

Also key is offering automated solutions to get the job done quickly. If customers can just press a few buttons and get exactly what they want done in two minutes, why not provide that?

Think about the consumer's mindset: they may not want to talk with their doctor right now, but they want to make an appointment. "Whether it's an app, text, email--whatever form of automation there is--we have to provide it for those people that want it, and for that transaction that should really use it," Mazour said. "Well, let's make it easy."

One key way to make digital solutions more user-friendly? Realize that digital tools work best in partnership with human interpreters. The trend of moving toward digital solutions continues to grow. "But the efficacy is being challenged," Harstad said.

Digital health tools must become human-centric, practical and personal.³³ "The integration has to be between people and digital. That's an important distinction," Harstad explained, noting that leaving members and patients on their own to figure out their devices will cause a lot of frustrated consumers. "How we build systems that move gracefully between digital, AI and access to a person who can help them is an important trend." Behavioral economics factors in, too.

"Within healthcare, economics, engagement and alignment to behavior are all coming together...As consumers, you will see more digital convenience, more personalization."

Chief Strategy Officer Steve Harstad

Digital tools can help with site of service economic alignment, better matching consumers with the right category and location for care.

Shifting resource levels and new technologies will make at-home care an increasing part of the strategy. "Clearly virtual is an important channel that will continue to play a role in engagement," Harstad said.

One underlying challenge? Data continuity. With myriad players providing different solutions, getting them all to communicate seamlessly may have some growing pains. “If the app doesn’t have the right access to certain things, it’s not going to accomplish what you want,” Mazour cautioned.

Disparity of data between health plans, providers, clinics and hospitals could take a while to unwind. “The synergy of that data has a long way to go to provide a real concierge level of service to the patient,” Mazour noted.

Another challenge? Security—companies need to consider how to safeguard against potential data breaches in a world where one password can’t be expected to secure it all. Figuring out the sweet spot where “convenience and ease and simplicity meets security” will be key, Harstad explained.

One way to better ensure this will happen? Get all stakeholders involved in the development of digital tools and platforms.³⁴



Prediction 5

Healthcare should prioritize customer experience to boost loyalty.

The value of quality customer experience isn't in doubt. A Deloitte study shows that hospitals perform better financially where patients report better experiences. Additionally, Harvard Business Review points out that healthcare executives rate improving customer experience as a top priority.³⁵

At its core, healthcare is a customer service industry. Yet in the wake of the turbulent pandemic era, the consumer experience has taken a hit. "Customer experience right now is at the lower end," Erwin said. "There's a real disconnect around the consumer experience."

The COVID crisis is a clear culprit. Routines have been upended. Systems and providers are understaffed, stretching their ability to serve customers.

Erwin related what is happening in healthcare to the airline industry after 9/11. An external event changed the collective experience of an industry, which struggled to meet demand when it returned.

It's understandable. After all, the healthcare industry bore the brunt of the pandemic, serving on the frontlines instead of working safely from home. "Those guys were open, dealing with a situation that they had never seen or anticipated. And quite honestly, they were just completely stressed out," he said.

The pandemic inflamed an already weak spot in the system: "Healthcare wasn't known for its great service before the pandemic," Erwin said.

Yet customer experience is a catalyst for change—the centerpiece of a strategy for engaging consumers amid rising expectations.³⁶

In an economy where cost containment matters, outsourcing customer experience has merits. By outsourcing CX, companies can reduce their spending on resources while working on a larger scale, serving their patients and members while lowering labor and operating rates.³⁷ Other benefits include 24/7 care coverage and multilanguage support.

With the return of patients to the healthcare system—and their less-than-favorable feedback reflected in some providers' ratings—healthcare is at an inflection point.

One way to approach it—be proactive. "Never let a good crisis go to waste," Erwin said. "I would embrace this opportunity. If we can differentiate ourselves at a moment where it's pretty much bad everywhere, that's an opportunity."

By leaning into the situation, healthcare organizations can build trust and empathy among their customers. They can pivot out of the situation and say they'll do things differently—including doing things better than before the pandemic.

A bold solution can win the day. Just look at Johnson and Johnson, which turned the Tylenol tragedy into a master class in crisis communications by putting people first.

Prediction 6

Health equity and social determinants of health.

Health equity was already a challenge before the pandemic, yet COVID-19 revealed the stark disparities.³⁸ Tremendous inequities in infection rates, hospitalizations, mortality and vaccination rates appeared among historically marginalized populations.³⁹ COVID showed that inequity - due to race, culture, income or ethnicity - can be fatal.⁴⁰

And it spotlighted the urgent need to improve health equity. Research shows that addressing social determinants of health is important for improving health outcomes and reducing inequities.⁴¹ “Health equity is a theme to watch,” says Harstad.

We’re all in this society together. There’s a growing awareness of this interconnectedness, and the fact that disadvantaged communities are disproportionately impacted when access to care contracts.⁴² Rural communities also face barriers to care access, including limited transportation options, shortage of providers and a lack of healthcare insurance.⁴³

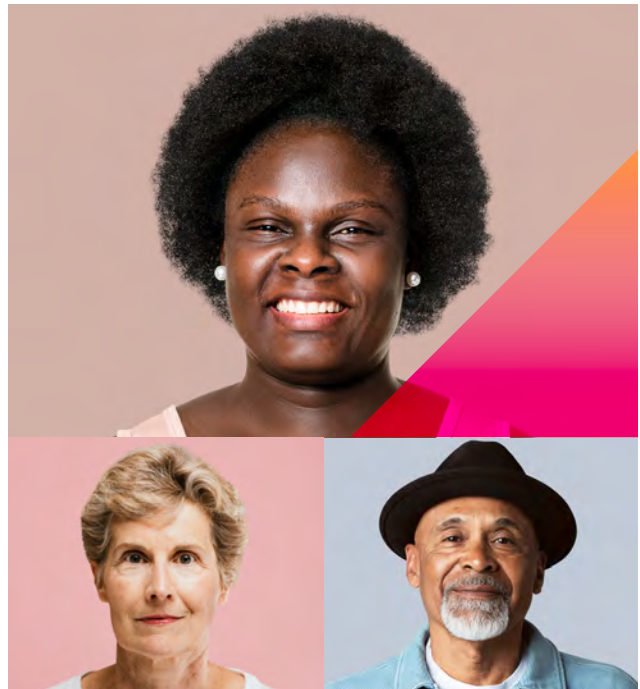
And how these inequities reverberate throughout society is drawing more eyes to the problem—including those in Washington, DC.

The CMS released its Framework for Health Equity 2022-2032, which aligns with the Biden Administration’s stated

goals of “advancing health equity, expanding coverage, and improving health outcomes.”

Although anticipated changes to the 2023 CMS Star Ratings that would have incorporated social determinants of health were tabled for further analysis,⁴⁴ the groundwork has been laid to address issues in data collection, standards alignment and adoption of screening measures for hospitals to capture information on social determinants of health.⁴⁵

It will be key in 2023 for the healthcare industry to realize the effects of rising inflation and inequities in health literacy, and how these two factors when combined reverberate through society. Using this information, the industry will need to determine how they can help tackle this challenge with innovative digital solutions, proactive outreach and customer care.



Prediction 7

Behavioral Health

America is experiencing a full-blown behavioral health crisis, according to 90% of respondents to one poll. Half of those individuals report they have someone in their own family who has had a severe mental health crisis and 20% rate their own mental health as only “fair” or “poor.”⁴⁶

The behavioral health crisis has been particularly impactful on America’s youth, who’ve had to deal with shuttered schools, gun violence, increased economic uncertainty and global warming.⁴⁷

Increased economic anxiety over inflation and fears of job or income loss are adding to the overall challenge—and Americans don’t always have great coping methods. Nearly a third of respondents in one survey said that after a traumatic event, they’d just moved on and not dealt with their feelings.

But the “stiff upper lip” approach misses a key part of the behavioral health challenge—the connection between mental health and physical health. This area of research is a rising trend in the field of healthcare, which has long studied the physiological side of things like stress, immunity systems and pathogens, but is just now starting to connect the dots between mental and physical health.

And while demand for these services is growing, access to professional help is limited. The National Council for Economic

Well-Being cites lack of access to care as a significant cause for the crisis, with a sobering 42% of Americans who need mental health services reporting they couldn’t get them.⁴⁸

That trend isn’t likely to change anytime soon. “Behavioral health is going to become an increasingly important part of our world,” Harstad said. “How you help somebody’s management of things like stress becomes directly related to how you impact their health.”

There’s a correlation between being in a positive mental state and staying healthy, including reducing risks of things like heart attacks and strokes. Similarly, poor mental health can lead to poor physical health.⁴⁹ Depression has been linked to a number of chronic diseases, including diabetes and heart disease.⁵⁰

People struggling with poor mental health may lack the ability to take care of their physical health, including seeking care, exercising or getting prescriptions.⁵¹ And poor mental health has an impact on the workplace, where lost productivity, absenteeism and turnover related to mental health can lead to reduced productivity and potentially higher health insurance costs.⁵²



So how to tackle this challenge and close gaps in access to mental health care? Continuing to educate the public about the importance of prioritizing mental health is key.

“Health literacy becomes an important part of it,” Harstad noted. However, the mental health crisis can’t be left only to the individual; governmental leaders need to take note. Yet, a report from the World Health Organization points out that governments worldwide are underinvesting in public mental health.⁵³

The good news--there is some movement. The U.S. Surgeon General released a framework for mental health and well-

being in the workplace.⁵⁴ Employers will play a big role in this effort, as they continue to understand the costs associated with poor mental health among their employees. They’ll be called on to provide access to tools and plans that can help.⁵⁵

Those solutions include telepsychiatry, which proved to be an essential strategy to provide access to high-quality mental health care during COVID-19.⁵⁶ Increased access to omnichannel appointment-setting technologies and telehealth solutions like text therapy, medication monitoring, mood-tracking software and guided meditation apps are other tools to help combat the mental health crisis.⁵⁷



Conclusion

As the world further sheds the skin of the peak mayday moments that made up the heart of the pandemic era, and COVID-19 assumes its new identity as an endemic challenge—a constant presence, not eradicated, yet constrained—the healthcare industry is emerging into a new normal that, in many ways, is far from that.

A storm of the century hit. Its impact was generational. The residual effects? They're still playing out, some in ways that, in hindsight, were foreseeable; others that appeared out of the blue.

Yet the threads of change that were appearing pre-pandemic—in health technology, economics, demographics, social

justice—are continuing, and their outcomes are not known. For a healthcare industry facing a series of new and daunting challenges, it's important to remember that opportunity is out there, too. It takes boldness to face a difficult scenario and creativity to solve problems. It takes engagement to build trust. Today's consumers want to trust the companies who get their business, and they expect a quality experience.

By meeting the moment, healthcare organizations can provide consumers with the superior experience they want while helping them better navigate uncertain, changing times.



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How Can We Help?

About Carenet Health

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