

# Market Research: A New Era of Care Transformation

Healthcare organizations are moving forward in re-imagining care delivery and addressing widespread challenges along the way



Shifts in how and where organizations care for their patients are reshaping consumers' care experience preferences and incentivizing healthcare leaders to push forward with their care transformation strategies.

Understanding the complexity of care transformation, Huron sought to better define the term and capture the holistic view it encompasses. We surveyed 312 healthcare leaders across the U.S.

## More than 90% of respondents aligned with the following definition:

**Care transformation** is the re-imagination of care delivery through the entire healthcare journey with the goal of delivering consumer-minded care that accounts for social determinants of health (SDOH) while improving patient outcomes and consumer experiences.

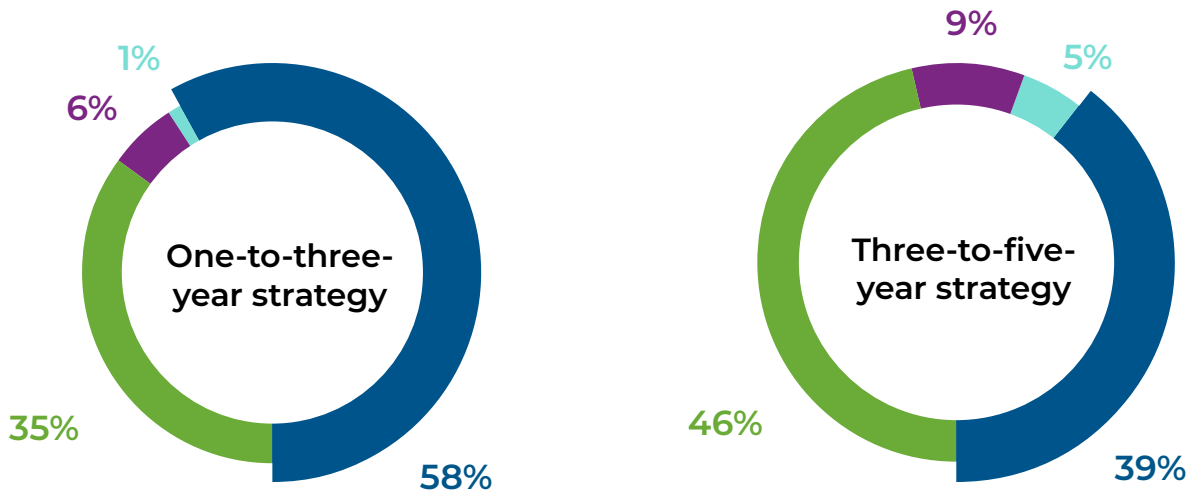
Alignment on what care transformation entails allows us to delve deeper into the priorities and challenges influencing organizations. Here's what leaders are saying:



**62%** of healthcare leaders say care transformation is among their top organizational priorities; about one quarter say it is their top priority.

# Strategy Execution Is Underway

Nearly all organizations have a short- and long-term care transformation strategy in place, with more than half actively executing their short-term strategies.



## Challenges Will Evolve Over Time

Variation between organizations' immediate, short-, and long-term challenges indicate the complexity of re-imagining the underlying structure and delivery of care. What remains constant is the relentless need to improve care access, affordability, and the consumer experience.

### Greatest and Most Important Challenges

Present	1 Year	3-5 Years
Care variation management	Patient digital, technology, and analytics	Shifting the cost curve to support overall well-being
Care access	Employee digital, technology, and analytics	Care access
Behavioral health	Changing sites of care	Health equity initiatives/ addressing SDOH
Capacity management (beds and providers)	At-risk patient populations (value-based care)	Changing sites of care
Shifting the cost curve to support overall well-being	Care access	Employee digital, technology, and analytics
Improving the consumer experience	Improving the consumer experience	Community partnerships to support public health

# Closer Look: Organizations Pursue Better Care Delivery

Care delivery is a major component of care transformation and ranks among healthcare organizations' key focus areas. Leaders indicate they are pursuing initiatives that cut across multiple challenges to deliver better care and a healthcare experience that meets consumer expectations. **Here's where they're focusing:**

51%

Employee-facing digital, technology, and analytics to increase efficiency

49%

Digital tools to improve operations (e.g., artificial intelligence/machine learning, chatbots)

49%

Health equity/ SDOH efforts

50% plan to invest in data and analytics to address health equity and SDOH

46%

Expanding digital sites of care (e.g., hospital at home, remote patient monitoring)

77% believe higher acuity care in the home will rise in importance as care settings evolve

40%

Investing in additional staffing

35%

Enhancing the consumer digital experience

# Looking Ahead: Digital-First Approach Key to Addressing Challenges

Data, technology, and analytics will underpin every aspect of care transformation, from [increasing care access](#) and [re-imagining care delivery](#) to addressing SDOH and securing financial stability.

To make [smart digital investments](#) and maximize their value, these three steps will be critical for leaders:



**Define desired outcomes:** A clear vision of the desired future state should be the impetus for the implementation of tools and solutions. Success will be determined by the organization's vision and plan to connect people, processes, data, and technology.



**Understand consumer and staff needs and preferences:** Digital investments should support the health needs and goals of the consumers in your market and align with how they want to experience healthcare — ultimately driving toward frictionless technology-to-human handoffs.



**Develop a strategy for integrating within your digital ecosystem:** Transforming care centers on an organization's ability to connect systems and data to deliver a seamless experience and improve outcomes. The adoption of digital tools will wane without continued investment in evolving business and operating systems to drive new ways of working with technology.

As care transformation challenges evolve over time, so should an organization's strategy. Leveraging technology to transform the patient experience and journey will remain core to improving care across the continuum and enabling sustainable change.

“Transformation is not a destination. It's an ongoing journey. **You have to be prepared to continue to evolve and transform.**”

— CHIEF DIGITAL STRATEGY OFFICER, REGIONAL HEALTH SYSTEM

## NEXT STEPS

Sign up for Huron's latest research and insights and find out how we can help you plan for the future.