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Accenture Asia-Pacific Healthcare Innovation and Transformation Survey

Innovation-Powered Healthcare

Country focus: Singapore

Singapore boasts one of the world's most advanced and efficient healthcare systems. But public and private sector providers alike, are fully aware of the urgent need to keep pace with the country's fast-growing and fast-aging population.

Indeed, while Japan often hits the headlines for having the world's oldest population, it is Singapore's that will age more rapidly in the decades ahead. This challenge is compounded by skills shortages, rising costs, overstretched infrastructure and budgetary pressures.

Singapore, like most advanced healthcare systems, needs a more innovative, technology-driven healthcare model—a decentralized, self-directed system, orchestrated by new participants, facilitated by technology, and optimized through advances in behavioral science and service design.

The 2016 Accenture Asia-Pacific Healthcare Innovation and Transformation Survey investigated patient readiness for such a model in Singapore, Australia and Japan. While the three countries share some of the same long-term capacity and budgetary challenges, their unique demographic, economic, cultural, political, geographic and social factors leave each with different priorities.

Our [Innovation-Powered Healthcare report](#) presents the results of the survey through the prism of each country's unique situation and explores a key question for each nation.

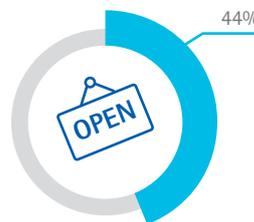
Top three areas consumers want improved: Singapore



The time I spend in waiting rooms

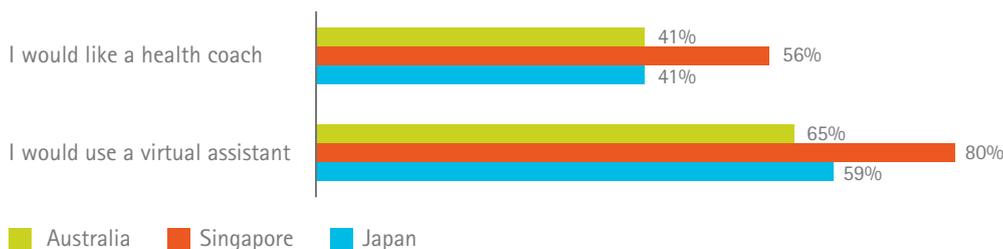


Costs, out of pocket expenses



Convenience of opening hours

Singapore shows greater openness to health coaches and virtual assistants



SINGAPORE IS READY FOR CONSUMER-DIRECTED CARE

In Singapore's case, that question is how to make the most of the country's willingness to embrace consumer-directed healthcare innovations. This question reflects a central finding of our survey: Singapore's patients are ready to shift to technology-driven, consumer-directed healthcare. For example:

- Over three-quarters (78 percent) of Singapore respondents trust themselves to take charge of their own health, in line with Australia (75 percent) and significantly more than Japan (46 percent).
- A similar proportion (74 percent) want more self-directed services—far more than in Japan (60 percent) and Australia (51 percent).
- More than half (54 percent) feel positive about technology replacing traditional healthcare services, compared with 41 percent in Australia and 49 percent in Japan.
- Singapore respondents showed the greatest enthusiasm for several specific innovations, including health coaches and virtual assistants.
- The vast majority (77 percent) are also prepared to complete procedures using devices at home to monitor their health (compared with 70 percent in Australia and 59 percent in Japan). Even more encouraging is that many patients in Singapore would be prepared to pay for such devices themselves, provided they were linked to the right mix of benefits.

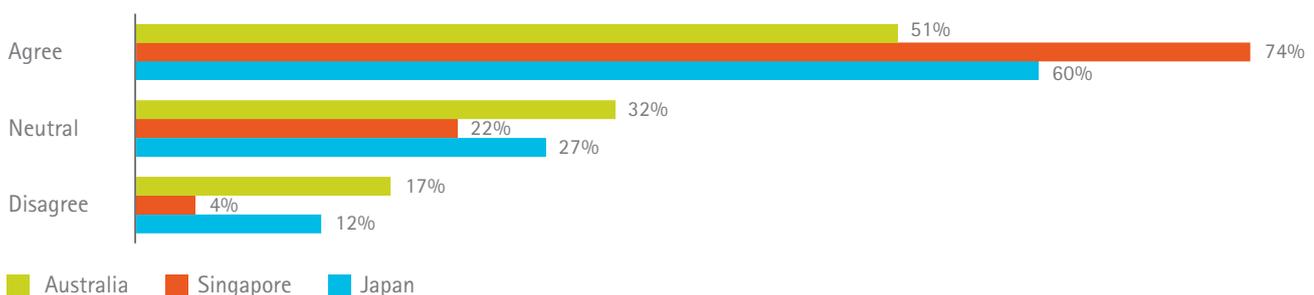
Singapore has already begun the transition to the healthcare model of the future. Pilot schemes have demonstrated the benefits of care-at-home services, the new HealthHub portal could ultimately link with or evolve into an intelligent virtual assistant, and the city's hospitals have trialed various forms of supporting technology – from robots and drones to augmented reality for doctors.

However, there is much to be done to engineer greater transformation—dozens of difficult questions need to be answered in detail. Where should transformation start and how should implementation unfold? What operational processes are needed to support different aspects of the model? How should primary care change to facilitate more technological interaction? How should various types of consumer-directed care be funded? How can disruption be minimized as the system transforms? What specific skills are needed to drive, implement and operate new models?

These questions just scratch the surface. But Singapore's readiness for the healthcare model of the future gives it the impetus to tackle these and drive ever-greater transformation. This opportunity should not be underestimated, because Singapore's largely market-driven healthcare institutions lack strong incentives to drive prevention and use-reduction initiatives. This is why it is crucial to give consumers the power to drive the shift to more innovative, technology-driven services. If this can be done, Singapore will surely lead the world to the healthcare model of the future.

For a full list of references and more about the survey, please open the full report.

Singaporean consumers want more self-service options



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SURVEY METHODOLOGY

Accenture commissioned a three-country survey of 2,250 consumers (aged 18+) to understand their attitudes toward their health system and healthcare technologies. The survey was completed online and included respondents from Australia (750), Japan (750) and Singapore (750). It was fielded by Longitude Research, on behalf of Accenture, between January and February 2016, with the sample evenly distributed across age groups, gender and income brackets. Each respondent self-reported having been treated by a health provider at least once per year over the past three years.

ABOUT ACCENTURE

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions – underpinned by the world's largest delivery network – Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With approximately 375,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives. Visit us at www.accenture.com.

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