

A large, bright blue chevron graphic pointing to the right, partially overlapping the text "High performance. Delivered." and the background image.

High performance. Delivered.

Accenture APAC Healthcare Transformation & Innovation Research

Digital Healthcare Evolution

Australia's path to the healthcare model of the future

INTRODUCTION

Accenture's healthcare transformation survey highlights the importance of a nuanced approach to digital transformation.

Much like the UK's NHS, Australia's free at the point of care healthcare system is vigorously defended by citizens, yet it grows more financially unsustainable each year. As deficits became intolerable, the UK implemented contentious austerity measures, which have sparked a crisis among junior doctors and indeed, across the whole system. Australia is not there yet, but every recent Government has been challenged to achieve major reforms in the face of strong opposition. So, is harsh austerity inevitable in Australia? What other change levers could health authorities consider?

Digital transformation, while no panacea, is likely to be critical if major austerity measures are to be avoided. Technology-driven models – particularly those that allow patients to do more for themselves – have the potential to cut costs, remove bottlenecks and even improve health outcomes. Many other industries have demonstrated how technology can work as a major catalyst for change, while healthcare has not invested as heavily or effectively. Meanwhile, impressive technological advances in recent years – particularly in data analytics, artificial intelligence and automation – have only added to the untapped potential.

PREVENTING DIGITAL WHITE ELEPHANTS

The key question is: how and where should Australian healthcare leaders invest to realise the full benefits of this potential?

Answering this may require understanding what healthcare channels and services consumers will choose. Without this a priori knowledge, authorities risk creating underused, undervalued or ineffective services, compounding the budgetary pressures they were designed to relieve.

A recent Accenture consumer survey of 750 Australians investigated attitudes to diverse aspects of healthcare transformation and innovation. While further research might produce better generalisability, the results suggest two things: one, there is reason to be optimistic about the prospects for technology-driven, self-directed healthcare in Australia; and two, shifting in this direction will likely require a departure from the current, "one-size-fits-all" approach to healthcare delivery.

THE MAJORITY OF AUSTRALIAN PATIENTS ARE TECH-SAVVY AND SELF-RELIANT

To this first point, three-quarters (75 percent) of adult Australians in our survey are confident with new technology in general, showing the population has the required aptitude to make the shift.

But there is also strong willingness to use new digital services: 70 percent would be prepared to use self-monitoring devices at home, 65 percent would use a virtual assistant¹ and 74 percent would interact with their doctor via email if it saved them time.

But it is important to note the difference between additional digital services and the replacement of traditional services with digital substitutes. Australians are not so enthusiastic about the latter. Only 41 percent feel positive about technology replacing traditional healthcare services, 17 percent view it negatively, and a high proportion (37 percent) are indifferent, perceiving equal pros and cons (see Figure 1).

A large slice of the pie may be informed by loss aversion. Some 85 percent of Australians are satisfied with the overall quality of care, while 81 percent said the same about the convenience of healthcare services. There is a lot to lose, and potential gains are untested and unfamiliar.



DESIGNING THE RIGHT SERVICES FOR THE RIGHT PEOPLE

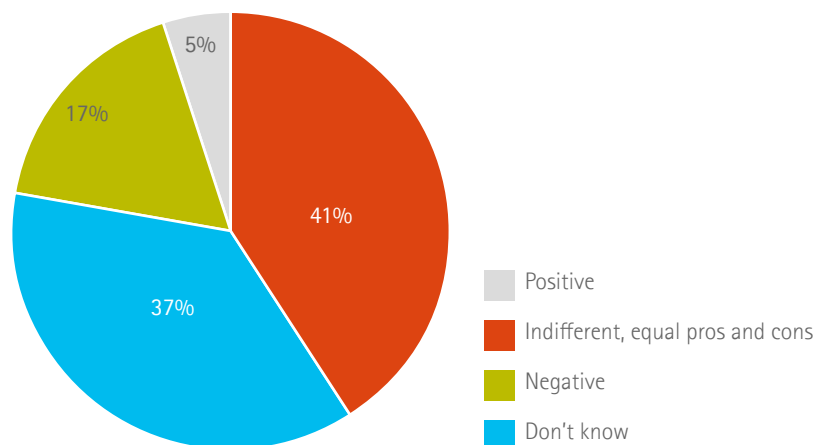
Enabling reform may depend on offering the right services to the right groups of patients.

And that means figuring out what various groups of consumers will adapt to, embrace or accept. Our research highlighted some basic examples of differences that might drive effective, patient-centred, service design:

For example, Australian men are more open to healthcare technology than women, and report higher technology confidence. Men are much slower to get a medical check-up, so a digital approach targeted at men's health issues may be more popular – and potentially more effective at the population level – than the traditional approach which is more popular with women.

Full-time workers – also more confident with technology – are more likely to use virtual assistants and are more open to being treated by a health coach.² Many full-time workers are chronically time-poor. They are likely to perceive digital services as more convenient – with fewer face-to-face appointments, self-monitoring opportunities, shorter waiting times, more access to health records and easier prescription renewals. These expectations are likely driven by time-saving digital services already enjoyed in other aspects of life, e.g. online shopping, home delivered groceries or mobile banking.

Figure 1: How do you feel about technology replacing traditional healthcare services?



YOUNG PEOPLE MAY EMBRACE MORE RADICAL CHANGE

Younger people (aged under 29) have markedly stronger technology confidence: 91 percent told us they are confident with new technology. They are also more open to health coaches and virtual assistants.

This suggests those under 30 are open to innovation and digitally-driven services, but more specific preferences are needed to effectively drive service design.

Take remote self-monitoring for example. More than half (52 percent) of those aged under 30 would pay for a self-monitoring medical device (linked to their doctor) if it entitled them to discounts on gym memberships, health coaching or a selection of healthy food from their supermarket. Only 31 percent of older respondents (aged 30 and above) would pay. The pattern was the same for a device that allocated "reward points" for healthy lifestyle choices and adhering to treatments.

By contrast, over half (54 percent) of those over 70 would not pay for any kind of health self-monitoring device no matter what benefits it provided

(including better management of their health condition or faster access to treatment.)

The fact that younger people are more open to paying for these devices is significant. Even if restricted to certain health conditions, significant savings could be achieved through self-monitoring. For example, Accenture estimates that US authorities could save almost US\$2 billion annually by adopting a model where adults with diabetes consult physicians face-to-face "by exception" rather than routinely - instead relying on technology-enabled self-monitoring.³ The technology to implement such a model already exists⁴ and there is reason to believe Australians under 30 with diabetes would prefer this approach.

THE MOST IMPORTANT FUTURE HEALTH WORKER: THE PATIENT

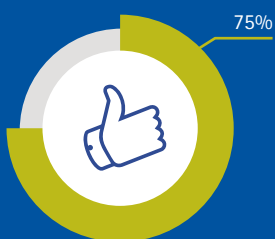
Identifying and accommodating diverse attitudes and preferences among Australians will be important to harnessing the cost and efficiency benefits of technology-driven innovation.

A fundamental change will be the introduction of a new kind of health worker that cares deeply about health outcomes: the patient. To empower patients, the healthcare system needs to be designed around them, with digital links to healthcare providers and decision support systems to guide and alert both patients and doctors.

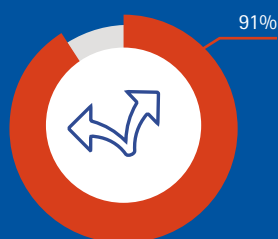
A suitably nuanced, patient-centred approach can enable the evolution of digital healthcare to protect the population from austerity measures, while creating a more financially sustainable health system for future Australians.

AUSTRALIANS APPEAR READY FOR SELF-DIRECTED, TECHNOLOGY DRIVEN HEALTHCARE SERVICES

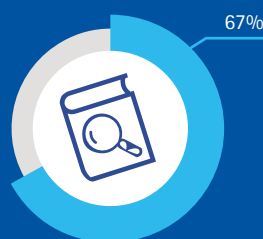
Strong self-reliance...



Trust themselves to take charge of their own health

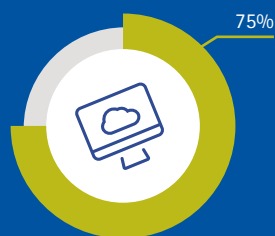


Feel comfortable deciding when they need medical treatment

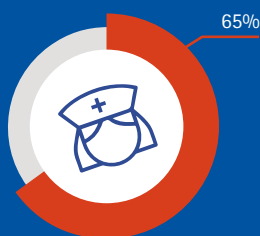


Have changed their lifestyle or habits to improve their health after doing their own research

...coupled with technology confidence and appetite...



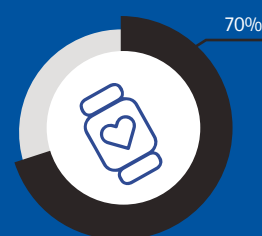
are confident with new technology



Would use a virtual assistant¹



82 percent would interact with doctors via the phone to save time, 74 percent would be happy with email, 58 percent with video conferencing



Would be prepared to use devices to monitor their own health from home

...suggests Australians are open to – and able to make the most of – self-directed, technology driven healthcare.

REFERENCE

1. Our survey defined this as: "A resource you could access on your phone, tablet or computer, which would help you manage more of your healthcare by yourself. For example, it could tell you the out-of-pocket costs for your treatments, help you find the right treatment option, or help you manage appointments and referrals."
2. A health education and motivation specialist that works to helps patients set health goals, become more confident about managing their health and make healthier lifestyle choices.
3. "Virtual health: The untapped opportunity to get the most out of healthcare," Accenture, 2015
4. For example, this device: www.gluco-wise.com

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.