OLDER SINGAPOREANS ARE MAKING WAVES IN DIGITAL HEALTH
AS SINGAPOREANS AGE, THEY ACTIVELY MANAGE THEIR HEALTH AND HAVE STRIKINGLY HIGH RATES OF ADOPTION OF DIGITAL HEALTH TOOLS, REVEALS ACCENTURE RESEARCH.¹ THESE FINDINGS SHOW THAT PEOPLE AGE 55 AND OLDER NOT ONLY VALUE HEALTHCARE TECHNOLOGY, BUT ARE READY FOR THE CUTTING-EDGE IN CONSUMER-FOCUSED DIGITAL HEALTH TECHNOLOGIES.
THE SILVERING OF SINGAPORE

People in Singapore are living longer, and the population is getting older. Just over one million people—over 25 percent of the resident population—are 55 and older today. By 2030, 40 percent of residents in Singapore are expected to be age 55 and older. By 2040, this number jumps to 44 percent.²

In addition to complex economic and social impacts, Singapore’s rapidly ageing population will put new pressures on its healthcare system. Singapore can expect an increased prevalence of chronic conditions and a growing need for wellness services that help keep people independent, active and engaged in their twilight years. As the Ministry of Health continues to develop programmes for the ageing population, strategies should account for how 55+ citizens manage their health.

In Singapore, silver surfers are people age 55 and over who use digital technology in their daily lives.
HEALTH MANAGEMENT IS ON THE RISE

The good news is that people 55 and over in Singapore are highly engaged in managing their health—and the trend is on the rise.

According to the Accenture 2016 Consumer Survey on Patient Engagement, 79 percent of 55+ year olds are “somewhat” or “very” active in managing their health—up from 64 percent in 2014. Later in this report, we see that 84% of the 55+ year olds are somewhat or highly active in considering technology to manage their own health. More older people monitored their weight, dietary intake, cholesterol and physical activity in 2016 than did in 2014 (Figure 1). What’s more, 30 percent of 55+ Singaporeans assess their risk of disease. This has grown from 19 percent in 2014 and tops peers in Australia, the United States and the United Kingdom.

DIGITAL HEALTH ADOPTION IS HIGH

Many older people in Singapore use digital health tools to manage their health. They are “silver surfers”—digitally savvy in their everyday lives—and when it comes to their healthcare.

Case in point: 64 percent use technology at least once a month to manage their healthcare, up 11 percentage points since 2014.

Over the past year, silver surfers used a variety of digital tools for health management, including websites (56 percent), mobile apps (40 percent), electronic health records (20 percent), social media (20 percent), and wearables (20 percent.) Only 2 percent of people 55 and over say technology is “not at all important” to managing health.

This silver surfers phenomenon is a global trend that Accenture has tracked for several years. However, it has a unique context in Singapore. The country boasts one of the world’s most highly-connected populations. Ninety percent of Singaporeans use smartphones, including 79 percent of those age 55 and over. Over half of 55+ citizens use two or more connected devices. Using technology to manage health—even among the ageing population—is a natural extension of the ubiquity of connected devices and the high overall rates of technology adoption in Singapore.
Silver surfers are not simply using digital health tools. They value them. After all, it is a time in their lives when people must be especially vigilant about health and wellness. In fact, 84 percent of people 55 and older consider technology to be “somewhat” or “very important” to managing health.

Survey data indicate that certain digital capabilities influence older Singaporeans’ provider choices to a greater degree than they do for the general population. Eighty-two percent of 55+ citizens are more likely to choose a provider who offers online appointment management—compared to 70 percent of the entire population. And 83 percent of the 55+ group are more willing to choose a provider who offers email or text reminders for preventative or follow-up care. Compare that 67 percent of the general population.

HEALTH MANAGEMENT FOR SENIORS: WELLNESS PROGRAMS DOING WELL?

There are many reasons that older Singaporeans are embracing health management. Multiple factors are at play at a population level—and for individual citizens too. However, targeted wellness initiatives are a likely contributor.

The upward trend in health management that Accenture has observed among those 55 and over correlates with the roll-out of government wellness initiatives for the ageing population during the same period. For example:

- The People’s Association rolled out the National Wellness programme in 2012 that helped older people become more active, more socially connected and more likely to participate in health screening.³
- The Singaporean government committed S$3 billion in 2015 to its Action Plan for Successful Ageing to help people stay active. The plan includes education and volunteer opportunities.⁴
- The National Health Promotion Board has programs targeting older people focused on weight loss, fall prevention, stroke awareness, fitness challenges, health screening and more.⁵
SILVER SURFERS ARE READY FOR THE NEXT WAVE

People aged 55 and older in Singapore are excellent candidates to adopt the “latest and greatest” in healthcare technology as part of their healthcare management practices.

Here is why. Silver surfers already manage their health, use and value digital health tools, and respond to innovative health and wellness programmes. This is an impressive trifecta of foundational elements to build innovative, government-led health initiatives for the ageing in Singapore.

The success of such initiatives will depend on continued digital education and literacy building among older healthcare consumers. However, the fact that the 55+ group has no reluctance curve around using digital health tools eliminates a significant barrier to lasting adoption. Consider silver surfers’ views on wearables, one of today’s leading-edge digital health tools. This technology includes smart glasses, wrist-worn displays, in-home monitoring devices and other data collection devices that can be worn on the body.

Seventy-three percent of 55+ Singaporeans wear or would be willing to wear a device to monitor vital signs. In fact, the ageing population is overwhelmingly positive about wearable health devices:

- **87 percent** believe they help with understanding health conditions.
- **80 percent** agree that they help with engagement in one’s own health.
- **77 percent** think they aid overall quality of care—just 3 percent think wearables hurt care quality.

The 55+ segment is fairly open to remote or virtual health visits. Like the general population, 28 percent of 55+ Singaporeans would prefer remote health visits if it meant seeing the doctor more frequently. Older people cite reduced costs to patients (59 percent), accommodation of both patient (55 percent) and physician (41 percent) schedules as the top advantages of virtual visits. A large portion of this population would also agree to use remote patient monitoring, especially if recommended by their doctor.
As it continues to evolve, there are opportunities for the Ministry of Health and private health organisations to develop innovative programmes and approaches that leverage the ageing population’s strong—and even surprising—digital health readiness. Some fundamentals for success include the following:

• **Treat the person, not the segment.**
  Healthcare organisations must avoid one-size-fits-all digital health solutions for people 55 and over. They are not a homogeneous group and need more than big buttons and large type fonts. Organisations can combine big data analytic insights and service design principles to develop solutions that are responsive to the true context of people’s lives.

• **Connect the health and social sectors.**
  By enabling cross-organisational data sharing, real-time information access, virtual at-home care models, and community-based healthcare ecosystems, digital health technologies can strengthen the country’s ongoing efforts to mine the intersection of health and social care to improve aged care programmes that assist the most vulnerable.

• **Create strong support networks.**
  Digital health tools are not just for monitoring and assisting the chronically ill in the ageing population. Active seniors can use digital health tools to get involved in wellness programs and receive personalised healthy reminders. Perhaps most importantly, they can connect to a community of care made up of friends, family, physicians and other caregivers.

• **Push the boundaries of possibility.**
  Singapore’s 55+ population is special—uniquely poised to be digital health pioneers. Healthcare organisations should take a “no limits” approach to considering use cases for smart technologies such as artificial intelligence, voice and sound activated alarms, virtual assistants, robotics and exoskeleton technology, Internet of Things, and more.

*Singapore’s silver surfers are not stuck in an analogue world. Far from it. The combination of their health management behaviours and digital health savvy make them the ideal audience for even the most innovative health technologies that can help extend quality of life and good health.*
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ACCENTURE 2016 CONSUMER SURVEY ON PATIENT ENGAGEMENT

Accenture commissioned a seven-country survey of 7,840 consumers ages 18+ to assess their attitudes toward health, the healthcare system, electronic health records, healthcare technology and their healthcare providers’ electronic capabilities. The online survey included consumers across seven countries: Australia, Brazil, England, Norway, Saudi Arabia, Singapore and the United States, including a total of 935 Singaporean consumers, of which 93 were 55+. The survey was conducted by Nielsen on behalf of Accenture between November 2015 and January 2016.

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