Consumer centred care in the digital age

Empowering senior Australians, carers and the aged care workforce.

A report on themes and shared insights from the Aged Care Innovation Roundtable Series.

September 2019
Changes to aged care legislation, as well as the introduction of new Quality Standards and a Single Charter of Aged Care Rights are single minded in their focus: consumer centred care. Consumers want to be empowered. They want to live well at home for as long as possible. They want to remain connected to family and friends. Accordingly, the health and aged care sectors must be ready to meet consumer expectations and preferences so that those accessing Australia’s aged care services are provided with high-quality care, without exception.

Australia’s ageing population is increasing disproportionately. It is anticipated that 3.5 million Australians will be accessing aged care services by 2050.\(^1\) By 2066, approximately one in five Australians will be 65 years of age and over.\(^2\) The aged care workforce will need to triple in size by 2050 to meet this demand.\(^3\) Half of all Australians currently live with some form of chronic ill health, such as cancer, diabetes or cardiovascular disease. These increasingly complex needs of an ageing population will place further pressure on the system.

With limited resources, the sector is struggling to keep pace. New, cost effective technologies are an important part of the solution. Technology can help improve sector collaboration, support providers to streamline and enhance service delivery, and enable consumers, carers and their families to participate more actively and meaningfully in the care experience. Contrary to popular opinion, Accenture’s research into Digital Health reveals that senior Australians are both willing and ready to embrace innovative and digital solutions as part of their care – especially if this means their care needs are met more efficiently.

How can the sector prepare for and embrace technology to help service providers deliver cost effective, high quality, consumer centred care?

What does this look like and what actions do we need to prioritise to get us there?
Senior Australians are rapidly adopting mobile technology. More than 70% of seniors have access to a smart phone and 90% have access to a digital device.

Although smart phone ownership by senior Australians drops in the 70 plus age group (from 71% to 57% for those aged 70-79, and to 34% for those aged 80 years and older), digital adoption is expected to push into these later years as the more tech savvy seniors retire and are familiar with using digital tools for their travel, banking, shopping, and to stay connected with family and friends online.
Seniors are riding the digital wave

Nearly 50% of senior Australians are using wearables, mobile apps and online health management tools every month.5

Accenture's research report 'Australian Seniors ride Digital Care Wave'5 tabled at each of our Roundtable discussions captured the changing expectations and attitudes of Australians over 65 using digital healthcare solutions:

- 61% of respondents over 65 say the use of technology when it comes to managing health is “very important” or “somewhat important”.
- 55% of seniors, if given the choice, would have virtual follow-up care services after being hospitalised.
- 95% of Australian seniors are willing to share their health information from a wearable or app with their doctor.
- 40% of Australian seniors would use an AI-enabled virtual health assistant.

While there is a desire by senior Australians to utilise AI tools and virtual health, less than one percent have done so, with only 7% having been provided with virtual care of some form. Supply of digital services by aged care providers is not meeting demand.

It is expected that older Australians will also want to take advantage of advances in care and technology to assist them to remain independent and engaged in society for longer. The United Kingdom government’s White Paper — Building the National Care Service noted: 'It is safe to imagine that the pace of technological change that we have seen over the last 20 years will continue, and that by 2030 the kinds of technology that will be available to us will be far beyond anything we know at the moment. Those using the care and support system will increasingly expect technology to play a part in helping them decide what care to choose and helping to improve their quality of life, and the care and support sector will need to be positioned to take advantage of these innovations'.1
About the Aged Care Innovation Roundtables

Healthily, Elsevier and Accenture were delighted to host more than 70 aged care and healthcare leaders representing government, peak bodies, consumers, academia, not for profit organisations and the private sector. There were a series of three Aged Care Innovation Roundtable sessions held in Sydney, Brisbane and Melbourne in March, April and May 2019. The roundtables brought together thought leaders from the aged care and health sectors to share insights, foster collaboration and discuss how embracing technology could improve the care experience of an increasingly tech-savvy ageing population. Attendees comprised of clinical and executive experts, academic researchers, policy-makers and those with operational knowledge of technological innovation and aged care. Their insights were invaluable in considering how we can effectively and efficiently adopt digital aged care solutions for the benefit of older Australians.

A facilitated discussion was conducted by Tony Golsby-Smith, Founder of 2nd Road focused on the following key topics:

- Empowering consumers, carers and families
- Empowering the workforce
- Health and aged care sector collaboration and partnerships

“Older Australians don’t want a 9-5 health care system. They want access to services when they need to use them.”

Ian Manovel, Principal Lead Health Innovation, Accenture
“We have a capable aged population that increasingly want to take control of their health”.

Euan Wallace, Chief Executive Officer, Safer Care Victoria

“Increasingly, consumers and their families expect their governments, health and aged care services to work together to provide integrated and coordinated health services. They also expect services will assist them to be more informed and involved in managing their health where possible; and to provide prompt, appropriate and individualised help when required. Cost effective digital solutions have a key role to play in helping to meet consumer preferences and expectations”.

Alison Verhoeven, Chief Executive, Australian Healthcare and Hospitals Association
Leaders indicated that while many services were aware of the digital health expectations of the growing proportion of tech-savvy seniors, there still remains a large gap between what consumers want and what care providers think their clients want. This theme was evident in the findings of a global survey released in Australia in 2014 ‘The RISE of online seniors’. It was agreed that the attitudes and interests of older Australians are changing and that this needs to be reflected by the aged care workforce, who plays a vital role in the success of digital offerings.

“Accenture research shows aged care providers are not keeping up with digital health social expectations and consumer choices. 88% of Australians aged 18-75 own or have access to a smartphone and over 95% of Australian seniors are willing to share information from a wearable technology or mobile app with a doctor. The time to engage with older Australians about digital health, is now”.
Leigh Donoghue, Managing Director – Health, ANZ, Accenture

“Empowering consumers, their families and carers with the confidence, knowledge and skills to manage their health and wellbeing is crucial to improving health outcomes and quality of life. We have found that one of the barriers to the adoption of tech by older Australians can be the preconceived beliefs of some of the workforce – their judgement that older clients are not capable of, or interested in, engaging with information in a digital format”.
Tina Campbell, Managing Director, Healthily
Despite increasing awareness and use of technology to enhance the care experience for consumers, discussions alluded to concern among some consumers and staff that technology may negatively impact the quality of their care experience; particularly where virtual interactions are perceived as replacing human contact. It was agreed there was a need for effective communication about how technology can enhance human connections and improve consumer choice. For example, research indicates that older Australians want telehealth services available after hours when face to face care is unavailable.\(^5\) It is also important to effectively illustrate, for already time poor aged care workers, how learning and integrating technology into their work flow will improve outcomes for consumers while freeing up time for valued personal interactions. Providers were also positive about the value of digital solutions on addressing challenges related to social isolation and loneliness. CaT Pin (Conversation as Therapy Pin), a wearable which uses the number of words spoken in a day as a measure for social isolation, was cited. Positive experiences were shared of older people (particularly those vulnerable to social isolation or with limited mobility) who enjoyed learning how to use digital devices to connect with family, carers or friends, or sharing their learnings with peers.

“There are great opportunities to use innovative technologies and personalised programs to reach and engage with large numbers of senior Australians, especially those impacted by age related illness and isolation – connecting them with support networks, services and communities, helping them to live more independently in places of their choice”.

Lyn Davies, MAICD, Managing Director, Tunstall Healthcare

“We are seeing our ageing population actively engage and utilise technology with confidence and intuition. We need to support this transformation and not assume that because of their age that they are disconnected from platforms. Technology can empower our elderly and assist to reduce social isolation”.

Rebecca Hogan, Operations Manager, Churches of Christ Queensland
While care workers are concerned about their clients’ preferences and quality of life outcomes, some have reported feeling anxious and uncertain about the impact of introducing technology, including AI, could have on their job roles and security. As a result, some may reject its value and resist adoption.

Despite these fears, the need for human interaction, especially in the health and aged care sectors, will remain high. While some roles may change to accommodate new digital solutions, ‘human-centred care roles’ are forecast to continue to grow. It is important that leaders prepare, update and inspire the workforce about the value that embedding new technologies will bring - including freeing up time spent on administrative activities for more consumer facing care.

“Workers within Aged Care and Home Care are motivated to help create a great service experience/better life outcomes for their clients – they need to be supported in understanding how embracing technologies can enhance and complement the great work they already do to benefit clients”.

Chris Coughlan, Strategy and Innovation Advisor, Villa Maria Catholic Homes
Leaders discussed the concept of power imbalances, especially between healthcare professionals and consumers, and its impact on consumer-centred care. While many care providers support consumer empowerment, some healthcare professionals resist losing decision-making autonomy. Traditionally there has been an inherent power imbalance in the relationship between healthcare professionals and the consumers who can depend on them. Poor health literacy and a reliance on care impacts the independence, choice and control of the consumer, who often lacks the care provider’s expert knowledge.

“Cultural change and education is needed so health professionals and care providers recognise that better consumer engagement and empowerment leads to better outcomes”.

Dr Amith Shetty, Emergency Physician, Clinical Director, Patient Experience and System Performance Division, NSW Ministry of Health. Clinical senior lecturer, University of Sydney

“ICT is a key enabler in helping providers meet the demands of an era of consumer directed care, where older Australians choose the type of care they access, how it is delivered and which providers deliver the services”.

George Margelis, Chair, Aged Care Industry Information Technology Council (ACiiTC)
5 Balancing compliance and empowerment

We heard that “if we use the Royal Commission as the excuse for more compliance the system will remain broken. We should be shedding measures and focus on using data to provide information which can help us to provide better care not to just ensure our workforce is more compliant - with some sort of traffic light matrix - because we know it doesn’t work”.

Participants felt that better quality of life metrics are needed to balance consumer preferences/choice with compliance. Performance reporting and compliance were seen to be at odds with consumer empowerment and enablement - and the delivery of more compassionate kinder care. For example, if a consumer falls regularly, does the care provider reduce the individual’s mobility to improve reporting outcomes? What impact would this decision have on the client’s quality of life?

While safety is an important feature in aged care performance metrics, better quality of life metrics are equally necessary to ensure consumer choice is essential.

Concerns were also raised that the sector-regimented regulatory environment restricts innovations like digital solutions. Some providers questioned whether system deregulation would allow care providers to focus on consumer choice over regulatory compliance.

Innovation and clinical governance structures that meet quality improvements, quality care and quality of life expectations will be a necessary step forward and as indicated from discussions, should be a consideration of the Royal Commission into Aged Care Quality and Safety.

“Seniors want to be empowered: they desire choice, independence, digestible information and want to have their care delivered to them with convenience and comfort in mind. Technology represents a huge opportunity to support consumer empowerment”.

Deidre McGill, General Manager - At Home Support, Bolton Clarke

50% of senior Australians say they want to use the internet more and would be more likely to use the internet if barriers around access, knowledge about devices and leaning how to do things online were addressed.⁴
Leaders discussed the link between health literacy and the uptake, safety and efficacy of digital health and wellbeing resources and tools.

Consumers need opportunities to improve their health literacy to confidently and effectively use digital health and wellbeing resources designed to improve self-management.

For those who have embraced more collaborative and well-informed partnerships with consumers, digital tools support workers to build their clients’ health literacy and influence positive behaviour change. Healthcare professionals and case managers are ideally placed to provide the right information at the right time, in the most appropriate and accessible formats, to build consumers’ knowledge and confidence. It empowers them to make informed choices about their health and care/treatment.

Participants also discussed using digital health tools to improve shared decision-making involving clinicians, older patients, families, carers and workers especially when discussing deteriorating conditions.

The Australian Institute of Health and Welfare (AIHW) has reported that 41% of Australians aged 15–74 were assessed as having adequate or more than adequate health literacy skills. This means that 59% of Australians do not really understand what the doctor tells them. People aged 60–74 were reported to have the lowest levels of health literacy skills - 88% with less than adequate skills.
“Digital tools or platforms can support providers to improve consumer access to relevant services, and to tailor and personalise information to support choice and decision making about their care, and ultimately to take a more active role in managing their health and wellbeing”.

Dr Mark Simpson Chief Clinical Information Officer, eHealth NSW Executive Director Clinical Engagement and Patient Safety

“Iain Edwards, Operations Director Community Health, Peninsula Health

“Health literacy is key to empowering consumers and carers, and building effective partnerships with their health or care workers. Older consumers are also increasingly mobile and engaging with video - technology now enables us to far more easily serve consumers the right information, at the right time, tailored to their specific health needs, literacy and cultural background, in for more effective and engaging ways than in the past”.

“Iain Edwards, Operations Director Community Health, Peninsula Health

“Providing tailored, accessible and timely digital health information can improve shared decision making and partnerships between health professionals and consumers. It can build health literacy, and support consumers and their loved ones to better prepare and participate more meaningfully in care consultations with their health professional”.

Kelli Browne, Director Strategy and Partnerships, Healthily
Confidence to go digital

It was recognised that seniors are a diverse group. Digital literacy and confidence is influenced by economics, age, education and cultural backgrounds. Younger seniors (50-69 years) are actively seeking digital health and wellbeing tools. They are more likely to have digital devices and access the internet multiple times a day. Older age groups (especially those aged 80 years and over) are much less likely to have access to a digital device. According to the 2018 eSafety report approximately 70% of older Australians use the internet multiple times a day. Importantly, regardless of current digital literacy levels, 50% of all respondents mentioned they wanted to use the internet more and said they would be more likely to use the internet if certain barriers around access, knowledge about devices and learning how to do things online, were addressed.

Uncertainty about the safety and clinical accuracy of digital health tools such as wearables and apps, low trust in the internet as a reliable source of health information, and difficulty in navigating websites and search results were all cited by roundtable leaders as potential barriers to fully embracing online tools and resources.

Greater understanding of self-care management devices would reduce reliance on the clinician and provider, and lessen unnecessary face-to-face appointments. However, leaders have identified hesitation to trust technology in healthcare settings because technology has not always been reliable. Likewise, providers suggested that older Australians do not trust technology as much as they trust their treating teams and providers. They also raised privacy concerns regarding their personal information and level of care they can expect to receive from digital solutions – both those that assist care services and those that enable care at home. Digital health wearables and apps in particular will need to address these safety, efficacy and quality concerns as they face increasing scrutiny and regulation.

It was noted that consumers are increasingly asking their trusted care professional for advice regarding credible digital health and wellbeing resources, tools and products.

Both consumers and providers benefit when aged care workers are empowered with the knowledge and confidence to guide older people regarding appropriate and helpful resources or products. Not only are providers supporting improved health and quality of life outcomes for their clients, but they can position themselves positively in a competitive market - generating good will, loyalty and retention. Progressive providers are using digitally enabled solutions that support their workforce to give consumers access to credible, evidence-based digital health information and resources that are relevant to their literacy, culture, needs and preferences.
“While many consumers are keen to embrace new technologies to support their own health and wellbeing, trust — especially in regard to security and big data usage — remains a major concern. Providers, payers, government and insurers will need to invest in building confidence to allay fears and find innovative ways to overcome these deep seated issues.”

Donal Byrne, Head of Clinical Operations, NIB

A recent survey conducted by the eSafety Commission showed that regardless of digital literacy, a significant number of older Australians want to increase their digital skills and, with mentoring and training, are keen to explore the opportunities of digital participation.

The importance of the digital literacy of older Australians has been recognised by the Australian Government. The Government has committed to invest $50 million to ensure that senior Australians will be equipped with the skills and knowledge to improve their safety online and allow them to participate in the modern digital economy.
Supporting the workforce

Sector leaders recognise the aged care workforce urgently needs to up-skill its technology literacy. It was also acknowledged that many providers have limited capacity to train staff ‘on the job’.

Developing and recruiting an appropriately skilled workforce with capacity to use technologies effectively and integrate them into service processes and systems will be a significant consideration for providers making the digital modernisation. At the sector level training at multiple skill levels across vocational and professional education is needed. Designing jobs and workforce requirements for the future is also needed. For example, do we have the health informatics workforce we need to leverage big data? Do we have data analysts who can make sense of big data? Do we have the business analysts we need with sufficient understanding of clinical and other care requirements to design, develop and implement digital solutions in health?

Leaders agreed that engaging with the workforce and securing their commitment to a technological transformation was crucial. Building workforce confidence in using digital tools and understanding how they will streamline their work will help secure that commitment. Using real stories to illustrate how adopting new technologies can enhance the quality of care was cited as an effective way of winning workforce hearts and minds.

It was noted that ICT leaders of the aged care sector could participate in the Aged Care Industry Technology Council mentoring program to leverage expert knowledge and increase the uptake of innovative technologies.

“Easy to use digital tools that free up time for more consumer facing care are essential for effective adoption. Co-designed with social workers and consumers we are using real time data and machine learning to improve access by hospitals to available residential aged care beds relevant to an elderly patient’s needs, culture, and geography - improving consumer experience, saving time, and releasing hospital beds sooner”.

Tull Roseby, CEO and Founder DailyCare

“Digital tools have tremendous potential to free up scarce resources. A behavioural change within the workforce is essential, however, to weaving digital tools into daily practice. The existing workforce should also undergo continuous training and skills development to ensure that their skills are keeping pace with technology adoption.”

Terry Reece, Head of Clinical Solutions ANZ, Elsevier
There’s an opportunity, with the help of digital innovation, for us to work towards better, kinder care – it’s not just about ensuring that our workforce and our service providers are more compliant, it must be more than that.”

Euan Wallace, Chief Executive Officer, Safer Care Victoria.

There is a wealth of evidence supporting the value of patient narratives (shared experiences) on improving confidence, self efficacy and self care behaviours. Increasingly patient stories, including insights from consumers with specific health conditions, are proving valuable in building empathy, knowledge and skills of the workforce.
The person at the centre

We heard the system has to change so the person is at the centre - otherwise we are setting ourselves up for more potential disasters as we have heard in recent media and the Royal Commission. “Leaders stressed, too many people are saying no one listened and no one cared”.

Co-design and co-evaluating solutions with end users is a good opportunity for quality improvement. There was consensus that person-centred design thinking and consumer journey mapping are successful techniques to design effective digital solutions that meet both clinical and individual needs. Co-design is an effective way to deliver quality aged consumer experiences and recognise their personal preferences.

It was also agreed that tailored, multifaceted solutions benefitting both the consumer and healthcare provider are essential to any effective digital health solution.

“Put informed citizens at the centre of your digital health decision making. They’re out there, they know what they want and they’re keen to engage in digital transformation”.

Harry Iles-Mann, Consumer Advocate, ADHA, and keynote speaker

“To put consumers at the centre of their care we need to more actively involve them in the design of services and get agreement on their desired health outcomes; and together with patients, agree where digital health services might support achieving those health outcomes in a way that is convenient, effective, safe and assures quality of care”.

Alison Verhoeven, Chief Executive, Australian Healthcare and Hospitals Association

“We need to make digital tools more accessible, co-designed with users, so that changes are not made in silos and administrative burden is reduced”.

Ian Manovel, Principal Health Innovation, Accenture
Funding models

How are we, as a society, going to pay for and maintain a digital health future designed to improve people’s lives and health outcomes?

Funding represents a barrier in doing things differently across the health and aged care system, and changes to funding models often lag behind the technological changes we aspire to implement. For example, the Commonwealth has only recently begun funding mental telehealth services or included telehealth in team-based funding models for people aged over 70. This may help explain why remote health consultations in Australia have remained flat at 3.4% (2014-2018), while 15.5% of over 65s say they would prefer virtual care if it meant seeing a doctor sooner. 

Consumer expectations are increasing. However, providers commented that many resist using their own savings on discretionary services, even if they want digital health services or tools. Providers indicated that many seniors believe the Government should fund health and aged care.

The reality is somewhat different. Government funding is limited and complex. Understanding funding arrangements, roles and responsibilities for primary care, hospitals, home care, and residential aged care is crucial to successfully integrating digital health technologies across the system.

Leaders emphasised that our challenge is ‘to bring together all of the parties involved in the system to create partnerships - not just a healthcare response’. Good examples of not-for-profits and social enterprises providing great care responses with very little means were cited as well as community partnering in rural and remote settings. Leaders discussed the opportunity to think more broadly about partnerships with these other players in the system, working together on more cost effective, digitally enabled solutions.

The pooling of resources at a regional level was raised as an opportunity to fund better community based care responses - facilitating consideration of funding through a consumer’s full cycle of care and across care sectors. For example, the NZ Canterbury District Health approach, heavily informed by consumer involvement, has been to consider what is the ‘right response’ to a problem first (don’t waste patient time/be more responsive), pool all available resources, redesign the system and then do it. The sheer number of organisations (veterans organisations were highlighted) fighting over limited dollars also impacts the sector’s ability to solve real consumer issues.

The need for funding models where innovative technologies can thrive, remain safe (e.g. updates for cyber security) and continue to evolve was stressed. It was recommended that local, state and federal governments collaborate on a national strategy for the aged care sector including government-funded demonstration pilots, incentives for technology adoption and the role of technology and innovation in quality standards.
Cross sector collaboration and leadership

As older Australians have a greater say in what services they receive and how they are delivered, partnerships between health, aged care and human service providers are crucial for consumers to fully benefit. Roundtable attendees acknowledged the importance of using digital solutions to improve collaboration across aged care, primary care and tertiary care settings to optimise consumer experience and outcomes. Opportunities include sharing digital resources and best practice to reduce duplication, maximise value for money and standardise measurement of quality outcomes across the sector. Digital collaborations with tech companies were also identified as a great opportunity for effective and progressive technological solutions.

“Harnessing and leveraging off existing social structures is a key strategy to reducing the digital divide experienced by some parts of the population, particularly in regional and rural areas. There is excellent work being done by partnering with existing community groups and services to embed/collocate digital health services in their premises”.

Karrie Long, Director Nursing Research Hub, Melbourne Health, Royal Melbourne Hospital

“As the health and aged care sector strive to deliver consumer centred care, service providers across all parts of the sector will be required to embrace new technologies that enable them to listen to consumers, collaborate and integrate their services”.

Linda Soars, Clinical Associate Director, Acute Care for Children and Older People, Agency for Clinical Innovation

“Older Australians want more support to help them maintain independence so they can age with dignity. This requires traditionally siloed health and human services to work more closely together to support integrated care including easier and faster access to a variety of primary, community, hospital and/or home care-based services”.

Laureen Hines, Director, HIU, Clinical Excellence QLD
Aged care providers are currently experiencing intense media and community scrutiny. Those trialing digital services are particularly sensitive to negative representation, especially where quality and safety may be perceived as being compromised by efficiency measures.

With the spotlight firmly on aged care, leaders emphasised the need to remain focussed on improving customer experience and quality of life outcomes as well as transparency and communication with family and carers - while proactively managing the quality, safety and security risks associated with adopting new technologies.

Attendees called for more robust public conversations about privacy and cybersecurity. It’s considered necessary for the sector to move beyond the risk-aversion currently hampering a digitally enabled future. It was noted that 10% of Australians have already opted out of MyHealth Record and many clinicians don’t participate because of privacy and security concerns.
It was agreed that using digital innovations to service remote and rural communities could enhance experiences and outcomes for patients. Governments will, however, need to consider funding to address infrastructure and connectivity barriers to digital solutions.

“Connectivity and equity for rural and regional Australia are key issues. This needs to be addressed by local, state and commonwealth governments”.

Alison Verhoeven, Chief Executive, Australian Healthcare and Hospitals Association

It is an exciting and challenging time to be working in aged and health care. There are opportunities to develop new technological solutions to improve quality of life and to support people to live in their homes as long as possible. Sensors, artificial intelligence, monitoring, machine learning and social platforms are exciting innovations with great potential to improve health, wellbeing, choice and independence. However, they are still a relatively new phenomena. There is currently little evidence to demonstrate their benefits.

Providers agreed, government needs to invest in trialling new solutions in partnership with the sector, so research and evaluation can inform improved models of care, and knowledge sharing.
References:


In response to interest expressed by Roundtable participants in continued collaboration and knowledge sharing across the sector, Healthily, in partnership with Elsevier and Accenture, will host a series of thought leadership webinars on the key themes, ideas and issues arising from this report. These sessions will provide the opportunity to interact, learn and discuss best practice approaches with a broad range of respected health and aged care sector leaders. More information about the webinar series will be sent to interested Roundtable participants.

Roundtable Working Group

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