

AUSTRALIAN SENIORS RIDE DIGITAL CARE WAVE

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Consumerism is gripping the Australian health market and older Australians represent a growing and deeply engaged catalyst for profound market change.

Private care providers must take the AI and digital health plunge if they want to remain competitive as tech-savvy Australian seniors dive into choosing and managing their own care and expect innovative technology interfaces. Nearly 50 percent of the aged population have taken the plunge and are now using wearables and mobile, apps and online health management tools every month¹.

Rapidly aging population

The Australian Institute of Health and Welfare study², “Older Australia at a Glance”, says that in 2017 one in seven Australians (15 percent) was older than 65. The population of older Australians is expected to reach 8.8 million (22 percent) by 2057. Of Australians over 65 surveyed in the Accenture 2018 Consumer Survey on Digital Health, over 86.9 percent say they are active in managing their health³.

It’s not just a matter of consumer demand, either. In the context of Australia’s Royal Commission into quality and safety in care facilities, it should be remembered that aged citizens have a fundamental right to choose how they receive care. Simply having to take what they are given doesn’t fulfil the expectations of that right at all.




22%

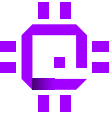
**of Australians will
be seniors by 2057**


Seniors keener on virtual health than younger Australians

According to the Accenture 2018 Consumer Survey on Digital Health, older Australians are active in managing their health and the trend shows increasing willingness to use virtual health and AI tools—sometimes even more so

than younger people. The myth that the digital revolution is only for the young continues to be disproven. With regard to AI intervention—and even invasive care like surgery—the research indicates that:

31%  of older Australians would be **very likely or likely to have a surgical procedure where the surgeon is assisted by an intelligent robot** in an operating theatre compared to 25 percent of Australians under 65.

22%  of seniors state a **strong preference** (top 2 responses on a 7-scale) **for robot-assisted spinal surgery** (compared to just 15 percent of Australians under 65).

51%  of older Australians would be **very likely or likely to use an AI doctor for emergency advice** (e.g., how to treat a head injury, snake bite or broken leg), but only 38 percent of Australians under 65 say the same thing⁴.

The survey respondents indicate that service provision is lagging behind demand. Despite willingness to engage with these tools, less than one percent of Australian seniors have ever interacted with health-related AI, and just seven percent have received virtual care. As the Australian population ages and care models evolve, private providers must make strategic digital health investments to meet demand and remain competitive⁵.

Virtual health service provision is lagging behind demand.

Seniors eager to take the AI leap

When it comes to the digital health tide, Australians over 65 aren't just letting it wash over them, they're actively swimming out into the waves as increasingly active participants in their own care.

Care providers that don't dive into the digital swells will be beached, unable to offer digital services, or meet demand, as the AI-driven digital tide moves inexorably forward.

Australians are living longer, seeking to age in place and already use many digital tools, with **61 percent of respondents over 65 saying use of technology when it comes to managing health is "very important" or "somewhat important."** This is up from 57 percent in 2016⁶.

The AI-driven digital health wave is definitely gaining momentum.

It is vital to note that older Australians are demanding virtual health and AI tools to further digitise their care. They are willing to use the latest digital tools, virtual care services and AI-enabled health assistants.

Virtual health has great potential for application, especially in rural areas like Western Queensland, where citizens are less likely to have both a usual GP and usual place of care. This represents an ideal opportunity for virtual health tools to reach and engage citizens in care.



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of respondents over 65 say use of technology when it comes to managing health is "very important" or "somewhat important".

Providers lag behind demand

The research supports the position that providers are under-serving the aged with digital care services. If given the choice, over **55 percent of seniors would have virtual follow-up care services** after being hospitalised, nearly 60 percent would participate in a virtual support group, and over 64 percent would have a virtual after-hours appointment (e.g., at night or on a weekend).

Additionally, 56 percent of Australian seniors would use a home device to test blood for a variety of indicators and over **40 percent would use an AI-enabled virtual health assistant** for scheduling and financial navigation or a virtual health coach offering proactive health management advice.

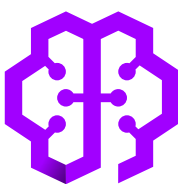
A further 69 percent of older Australians would be confident about the strength of assessment and prediction if it were the work and conclusion of their primary care doctor supported by a virtual/robot doctor powered by AI⁷.

Many older Australians lead busy, active lives. They are short of time and want to access care services where and how they choose. Furthermore, many of them have the ability to self-fund digital care services if government- or insurer-funded services do not meet their expectations.

Care providers who want to lead the Australian market into the future should be cognizant of the fact that demand is shifting rapidly, and supply is not keeping up. As care models evolve, private providers must act and invest to accommodate the hunger for virtual and AI in health. Apart from being willing to use the latest digital tools, Australian seniors also show great willingness to share health information.

Over 95 percent of Australian seniors are willing to share health information from a wearable or app with their doctor and use of health apps among this population has increased five-fold from 2.9 percent in 2014 to 15.5 percent in 2018⁸.

Very few older Australians have ever interacted with virtual health or AI. Only seven percent have received virtual care and less than one percent have interacted with health-related AI. The disparity between demand for and use of, virtual health and AI tools (and the concomitant willingness to share data) may indicate that the market has not yet created the right solutions to meet demand.



40%
of Australian seniors would use an AI-enabled virtual health assistant

Remote consultation usage flat, demand growing rapidly

Use of remote consultation stayed flat (at 3.4 percent) over the 2014-2018 period, but the preference for remote consultations rose dramatically. In 2014, 2.7 percent preferred remote visits if it meant seeing a doctor more frequently; in 2018, 15.5 percent said they prefer virtual care if it means seeing a doctor more quickly⁹.

This is another care service where supply simply isn't meeting demand.

A recent Accenture workshop with 100+ health industry attendees at the Australian Telehealth Conference 2018 concluded that removal of barriers to virtual health would create a surge in demand.

Less than one percent of older Australians have ever interacted with any AI technology that relates to health. Here are some key steps towards AI and digital health market leadership:



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.



Informed citizens can be choosy, getting to know them is crucial if you expect your AI and digital patient engagement to meet their needs. So plunge into the citizen-centricity tide by investing in CRM and virtual care systems as part of a comprehensive digital health strategy.



Make sure you identify appropriate complementary partners to help you develop the digitally-enabled capabilities and tools you need to stroke strongly out to the deep water so you can catch the shore break back to the beach with your customers on board.



IT'S TIME FOR PRIVATE
CARE PROVIDERS TO TAKE
OUT THE SUNSCREEN AND
PULL ON THE SWIMWEAR.



AI AND DIGITAL
HEALTH LEADERSHIP
WILL REQUIRE FULL
COMMITMENT TO THE
WAVE, IF PROVIDERS
WANT TO REMAIN
COMPETITIVE AMONG
SENIOR AUSTRALIANS
KEEN TO OVERSEE
THEIR OWN CARE AND
INTERACT USING
INNOVATIVE HEALTH
TECHNOLOGY.

Accenture 2018 Consumer Survey on Digital Health

Accenture commissioned a seven-country survey of 7,905 consumers aged 18+ to assess their attitudes toward healthcare technology, modernization and service innovation. It is the latest in a series of annual health technology surveys tracking the perspectives of consumers across themes ranging from electronic health records and health management to virtual health and cybersecurity. The online survey included consumers across seven countries: Australia (1,031), England (1,043), Finland (848), Norway (768), Singapore (957), Spain (957), and the United States (2,301). The survey was conducted by Longitude on behalf of Accenture between October 2017 and January 2018. Where relevant, the survey uses select findings from the Accenture 2016 Consumer Survey on Patient Engagement.

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References

1. Accenture 2018 Consumer Survey on Digital Health.
2. Australian Institute of Health and Welfare, 2017, Older Australia at a Glance.
3. Accenture 2018 Consumer Survey on Digital Health.
4. Ibid.
5. Ibid.
6. Accenture 2018 Consumer Survey on Digital Health and Accenture 2016 Consumer Survey on Patient Engagement.
7. Accenture 2018 Consumer Survey on Digital Health.
8. Accenture 2018 Consumer Survey on Digital Health and Accenture 2016 Consumer Survey on Patient Engagement.
9. Ibid.

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