

PRESENTATION

Research to inform digital health understanding

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The research comprised of eight qualitative group discussions with consumers, split by health status and life stage

Group structure

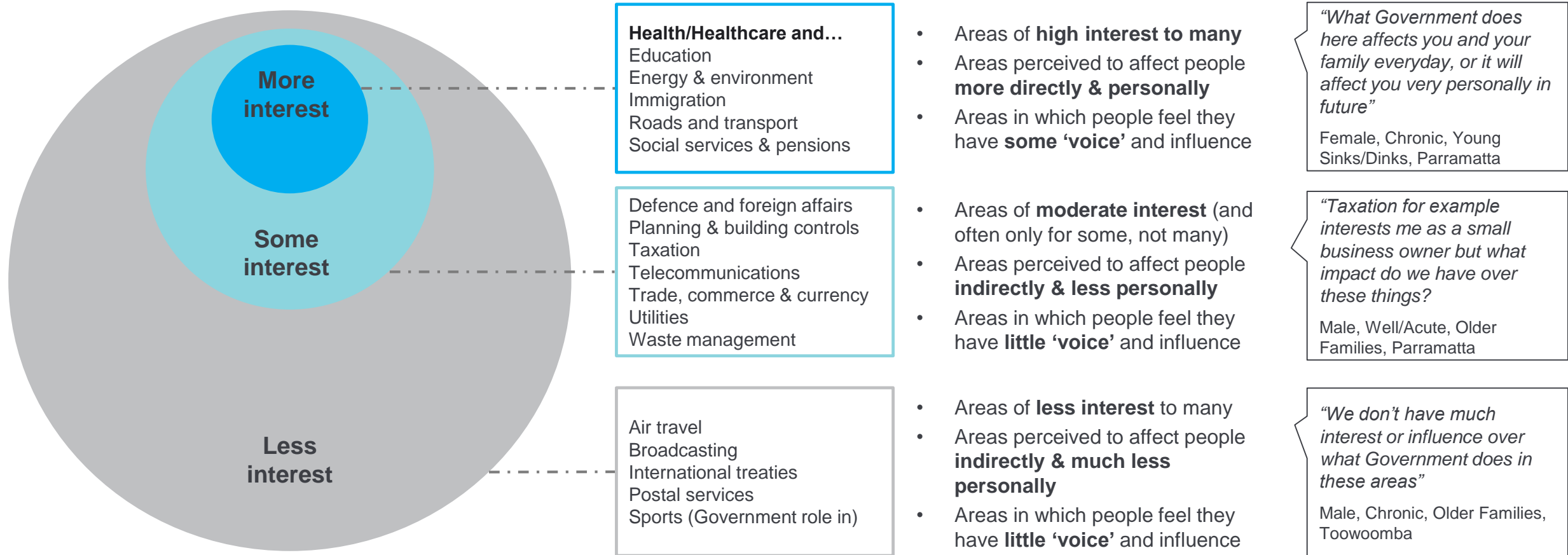
- Eight 1.75-hour, mixed gender group discussions conducted between 30 September and 2 October 2019

		HEALTH STATUS	
		Chronic	Well / acute
Group type		<i>1.75-hour mini groups, of up to 6 participants per group</i>	<i>1.75-hour focus groups of up to 8 participants per group</i>
LIFESTAGE	Young SINKs/DINKs	1 x Sydney	1 x Toowoomba
	Younger families	1 x Newcastle	1 x Brisbane
	Older families	1 x Toowoomba	1 x Sydney
	Empty nesters/older SINKs/DINKs	1 x Brisbane	1 x Newcastle

Participant specifications

- Health status definitions:
 - **Well:** Have no current health issues. Have been prescribed medication of any kind in the last 12 months
 - **Acute:** Have current health issues. Take prescribed medication for the health issues. Expect to recover fully within 6 months.
 - **Chronic:** Have current health issues. Take prescribed medication for the health issues. Expect to need ongoing treatment/management of their health issues. Take more than 1 prescription medication.
- Lifestage definitions:
 - Younger SINKs/DINKs: Aged 18-29, no children, living independently (not with parents) and not still at school
 - Younger families: Aged 30-44, all children 12 or younger
 - Older families: Aged 40-54, at least one child 13 or over
 - Empty nesters/older SINKs/DINKs: Aged 50-69, no children or all children living away from home
- Other criteria:
 - All participants own a mobile phone and use either text messages or data services on the phone
 - All participants go to the pharmacy themselves to fill their prescriptions
 - CALD participants included in all groups

Within areas of Government*, Australian consumers have **substantial interest in Health and Healthcare**



* Local, State and/or Federal Government responsibilities

High levels of interest in Healthcare as it relates to **Affordability, Equity & Access and Sustainability**



Affordability

Affordability of healthcare top of mind for most Australians due to cost-of-living pressures

- Cost of living pressures being felt strongly due to high levels of household debt, combined with low wage growth, and the ongoing trend for essential goods and services to increase in price much faster than discretionary items
- Healthcare cost pressures being felt strongly due to increases in the cost of private health cover, perceived increases in Medicare and private health gap payments, and an overall sense that we are consuming more healthcare services due to the increasing prevalence of chronic health issues in the community, the ageing population and the focus on preventative healthcare

"I see dollar signs, prices going up. It's so expensive and I think it will become more unaffordable in future. I don't see it getting any better"

Male, Well/Acute, Older Families, Parramatta



Equity & Access

Equity and Access to healthcare a rising concern for many

- Driven by a perceived erosion in Medicare coverage & benefits, a rapid increase in private healthcare costs and gap payments, and concerns about access to healthcare for regional/rural Australians
- Meaning that those who can't afford private health cover, or the gap payments, or can't easily access health services are missing out
- Driving a perception that we are heading towards a society of healthcare 'haves' & 'have nots'
- Hits at the heart of an important part of the Australian psyche...the image of ourselves as a fair & equitable society

"A lot of people aren't going to the doctor because they can't afford it. It's an Americanisation of the system... those that can afford it get care, those that can't, don't"

Female, Chronic, Younger Families, Newcastle



Sustainability

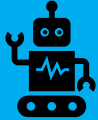
Sustainability of Australia's healthcare system considered a significant medium to longer-term concern

- Many believe that the system's sustainability is under threat due to a rapidly rising and ageing population relative to the available healthcare infrastructure, services and staff
- Exacerbated by a relative decline in the number of working-age, tax paying Australians to fund the system, and declining private health membership
- Putting strain on the public and private system
- Leading many to question how the current quality of healthcare can be sustained

"The private system isn't sustainable, people are leaving. And that's putting pressure on the public system and the sustainability of that too"

Male, Well/Acute, Younger Families, Brisbane

Most Australians recognise that technology will play an ever-increasing role in the future of healthcare and are **interested in its benefits**



Accept our world is increasingly technology enabled

- It's how we live / it permeates our lives
- From how we transact and interact e.g. airline tickets and boarding passes, digital credit cards, messaging services
- To how we store information e.g. cloud storage for photos, emails, music

"The future is one of everything being fully online in your home"

Male, Well/Acute, Younger Families, Brisbane



Believe that healthcare will be no different in future

- See an ever-increasing role for, and reliance on technology to improve healthcare and health outcomes

"It will mean organisations talking to each other, sharing records, having everything in one place, and not physically having to go to the doctor but seeing them the Internet"

Female, Well/Acute, Younger Families, Brisbane



Interested in human-centred benefits of health technology

- Want to know what the health technology means for people
- Rather than about the technology alone

"I see AI, nano-bots and robots looking after people"

Male, Chronic, Sinks/Dinks, Parramatta

Understanding of digital health amongst consumers is limited



The term 'Digital Health' is unfamiliar to many

- Some believe they are familiar with the term, but many others are not
- Consumers tend to use broad terms like 'technology' or 'health technology' instead

Moderator: *"Being completely honest, as there's no right or wrong answer to this question...who here has heard the term 'digital health' before?"*

Group participants: *"No; no not before; no not me...etc"*

Moderator: *"So that's 8 out of 8 that have not heard the term 'digital health' before, is that right?"*

Group of Well/Acute, Older Families, Parramatta



Consumers struggle to offer many concrete examples of digital health technologies

- Typically limited to what they've heard and read about in the media e.g. My Health Record, Telehealth
- Some also imagine that app-based electronic prescriptions, and other unspecified health apps to assist with booking and communicating with health care professionals (HCP's) and monitoring body functions also fall into 'digital health'

Participant 1: *"I think of the 'e-Health Register', is that it?"*

Participant 2: *"And video check-ups, Skype calls"*

Participant 3: *"Maybe your prescriptions on an app?"*

Group of Chronic, Younger Families, Newcastle

Attitudes towards digital health are polarised (1 of 2)

For consumers, digital health is currently interpreted as: My Health Record, Telehealth, electronic prescriptions, and various unspecified app-based services to book & communicate with HCP's, and monitor body functions



Can see many digital health benefits

Affordability

- Lower cost HCP consultations conducted over the Internet

Convenience

- Easy, app-based bookings with HCP's
- Apps that enable patient to receive, store and order prescriptions
- Centrally located digital health records (easily accessible for patients and HCP's)

Equity & Access

- Access to telehealth services for those living in regions with poorer access to healthcare

Health outcomes

- Technology that enables faster and earlier detections and diagnoses (supporting preventative health efforts)



But also hold substantial concerns

Quality

- That digital technology will be used instead of human-to-human care as a cost-cutting measure (to the detriment of quality healthcare)

Equity & Access

- That digital technologies will be more readily accessible to the digitally literate, to the detriment of those less digitally literate

Health outcomes

- That substituting human-to-human care with digital technology may lead to poorer care overall (e.g. diagnoses by algorithm)
- Meaning less use of intuition, hypotheses and 'hunches'
- Increasing the risk that some patients may fall through the cracks

Many other examples of digital health are of interest to consumers

More interesting to consumers

Self-monitoring apps & devices

(for people with chronic conditions, to enable you to monitor your condition without travelling to the doctor)

- Of interest to well/acute and the chronic...many well/acute are carers of people with chronic conditions
- Offers convenience, safety (monitoring) and possibly better health outcomes

Health management apps

(one place to store information about your healthcare plan and any medication you're taking)

- Offers convenience, safety and efficiency by providing a central place to store important medical and medication information

Price comparison tools

(so that you can inform yourself about out of pocket expenses or market rates for specific health services)

- Supports consumers' desire to find affordable healthcare
- Although consumers need to know that the information is impartial and trusted

Electronic prescriptions

(instead of paper)

- Convenience the most readily acknowledged benefit
- Easy to receive, easy to store, less chance of misplacing

Telehealth

(video consultations with GPs or specialists – when there is no local doctor/ specialist, or for a quick follow-up)

- See an equity & access benefit for Australians living in remote areas
- And can imagine it may reduce costs for metro residents too via shorter online consults

Some examples of digital health are of less interest to consumers

Less interesting to consumers

Evidence-based symptom checker apps

(to improve access to quality diagnostic information online)

- Many consumers believe that online symptom checker services can cause more problems than solutions
- Believe they encourage self-diagnosis by consumers who are not equipped to make such diagnoses
- Potentially leading consumers to jump to conclusions, make bookings with HCPs & consume valuable HCP resources
- Reducing the capacity of the system to serve those who really need it

Provider ratings tools

(so you can find out about a potential healthcare provider's clinical outcomes and patient experience)

- Many consumers lack trust in such ratings tools
- Concerned that ratings will not be impartial
- Many would prefer to take the expert advice of their doctor or specialist when searching for healthcare providers

Data security initiatives

(to ensure your health information is safe when stores digitally)

- While paramount for consumers to trust that their health information is stored securely, it's not a topic that interests many
- Many assume security measures would be in place (place a lot of faith in Government and private-sector to ensure this)

Thank you

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