

Australia's health reimagined

The journey to a connected and confident consumer

Illustrative summary
March 2022



Reimagining the health system

The future of health in Australia

Australia's pandemic response has proven we can adapt to virtual healthcare at speed. But how can we sustain this momentum and shape a digitally enabled future health system that truly benefits all Australians?

Taken in 2021, the *Reimagining Healthcare Consumer Survey* provided crucial consumer insights into people's experiences and expectations of virtual healthcare:

71% agreed or strongly agreed that sharing access to their health information would improve communication with healthcare providers.

72% agreed or strongly agreed that telehealth outcomes were the same as they would have been face-to-face.

83% were at least somewhat interested in being able to access their own health records.

65% would consider using more advanced home-based technologies to help identify and diagnose health conditions.

This whitepaper, *Australia's Health Reimagined*, is the culmination of work from a Digital Health CRC project delivered by Deloitte, Curtin University and the Consumers Health Forum of Australia. The report is driven by four key objectives:

- 1 Demonstrate why now is the time for the health system to transform
- 2 Set a bold ambition for the health system of the future
- 3 Present a three-horizon model to deliver Australia's future health system
- 4 Provide recommended actions for policy, research and practice to deliver change.

Back to the top

The quadruple aim

Enhancing the consumer experience

Consumers receive care at a time, in a format and location of their choice.

Improving population health and health equity

Using data to personalise strategies with a focus on prevention and wellbeing.

Reducing costs and providing better value care

An ecosystem enabled by technology will create greater efficiencies and reduce costs.

Improving the work life of healthcare providers

Leveraging technology, automation and AI.

The case for change

Why now is the time to transform the health system

Enhancing the consumer experience

Consumers are experiencing gaps in access to health services

13% of consumers experienced issues due to a lack of communication between health professionals.

17% of people waited longer than they felt acceptable for a medical specialist.

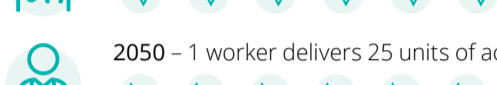
18% of consumers felt medical specialists did not always spend enough time with them.

22% of people waited longer than they felt acceptable for a GP.

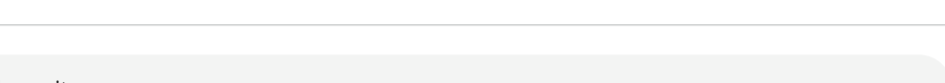
Improving the work life of healthcare providers

Health workers will need to deliver four times the current service level to meet forecasted needs based on health workforce projections.

2021 – 1 worker delivers 6 units of activity*



2050 – 1 worker delivers 25 units of activity*



Health worker

Activity unit *(NWAU)

Improving population health and health equity

The current health system has failed to address the cultural, cost and location barriers that continue to create inequitable access and poorer health outcomes for Australians facing these challenges.

Compared to the average consumer*

	Life expectancy (years)	Burden of disease (daily rate)	Delayed/did not see due to cost	Potentially preventable hospitalisations
Indigenous	-8.2	x2.4	+3.5%	+5.1%
Low socio-economic	-1.9	x1.6	+2.2%	+0.8%
Very remote	-3.8	x1.3	+1.8%	+3.9%

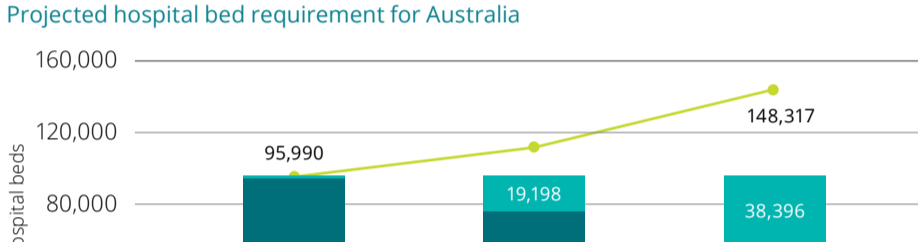
*non-Indigenous, least socio-economically disadvantaged and residing in a major city.

Reducing costs and providing better value care

To meet projected demand and replace ageing hospital bed stock, Australia needs to build 375 hospital beds per month for 15 years.

- Existing beds
- Bed replacement
- New beds (growth)

Projected hospital bed requirement for Australia



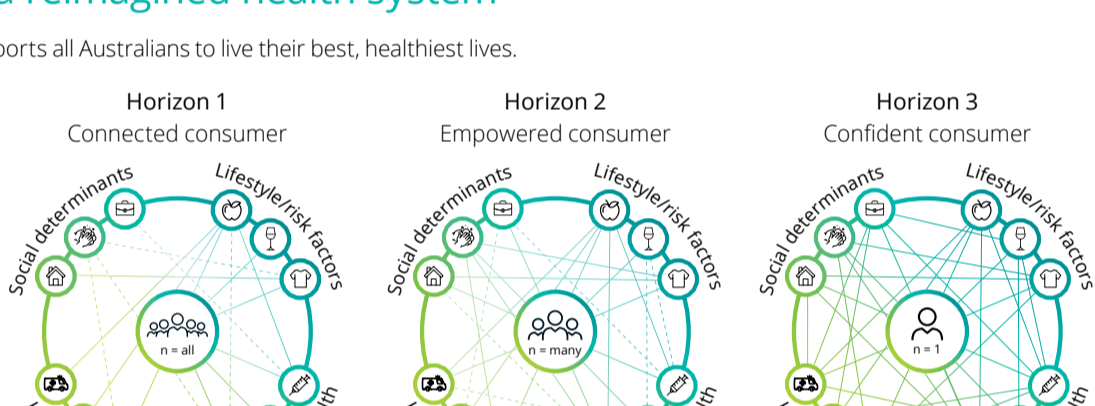
Back to the top

Three horizons to a reimagined health system

Vision – a health system that supports all Australians to live their best, healthiest lives.

The diagram describes a number of important transitions that will reorientate the health system to focus on the needs of individuals.

We envisage some overlap between the horizons with activities and advances occurring in parallel over the next ten years.



Consumers	Horizon 1 Connected consumer	Horizon 2 Empowered consumer	Horizon 3 Confident consumer
Consumer experience	System takes a paternalistic role, consumers experience fragmented care	Consumers are empowered to access care	Consumers take an active role in their health and wellbeing
Personalisation	Low – care is one-size-fits-all	Targeted care for cohorts with distinct needs	High – care is personalised for individuals
System navigation	Complex	Improved navigation for at-risk groups	Digital integration enables easy navigation
Digital inclusion index	71 (some consumers have limited access)	85	95 (most consumers have equitable access)

System	Illness	Wellbeing
Health system focus	Narrow – focused on treating illness	Broad – focused on health and wellbeing
Integration	Low – fragmented system	Better integration of complex care pathways
Funding	Input and output funding	Hybrid funding model
	Outcome-based funding	

Enablers	Physical	Digital
Health workflows	Analogue – minimal use of digital record keeping	Cloud-based digital records and workflows
Data interoperability	Low – some sharing between providers	High – data shared between consumers, providers and across sectors
Workforce	Substantial administrative burden on workforce	Digital tools strengthen the relationship between clinician and consumer
Integration of physical and digital infrastructure		

Fiscal	Low	High
Value		

Population health	Low	Moderate	High
Health literacy	Low	Moderate	High
Risky behaviours	High rates of risky behaviour	Moderate rates of risky behaviour	Reduced rates of risky behaviour
Ecosystem approach	Weak		Strong

Back to the top

The path forward

Across each of the horizons, key actions are needed in the following areas to plan and deliver a reimagined health system that leverages data and digital as enablers:

Digitise with purpose

Vision

Develop a clear vision and purposeful set of objectives for the health system based on the quadruple aim, including addressing health inequity.

One purpose

Integrate primary, secondary and tertiary healthcare and governments with a common purpose: providing people-centred, digitally enabled care.

Not digital only, enhance not replace

Infrastructure

Establish minimum standards for integrated digital and physical health infrastructure.

Data control

Give people the control to provide, share and use their health data.

Elevate data

Build governance frameworks to support consumer data sharing and privacy across the ecosystem.

Interoperability

Require health data to be available for consumers to engage with and share with whom they choose.

Transparent, agile and accountable

Accountability

Build clear accountability frameworks aligned with delivery of the quadruple aim.

Leadership and change

Invest in developing the current and future leaders of the health system and invest in change and implementation science to support the system transition to horizon 3.

Empower and engage consumers

Go together

To maintain healthcare's social license, health practitioners and the community need to participate in the journey together.

Health literacy

Develop tools to support greater health literacy and engagement in one's own health.

Invest in equitable technology

Connectivity

Improve digital connectivity (internet, device and data) for consumers and providers where they live, work and play.

Strategic investment

Government and other funders need to rethink investment in digital health and make more coordinated, strategic decisions to move the system toward Horizon 2.

Workforce experience

Digital workflow

Invest in clinical and non-clinical workflow platforms to improve efficiency and reduce the administrative burden.

Workforce

Define role-based workforce models, empower clinicians to operate at the top of their scope of practice and ensure adequate digital training for new and existing health workers.

Meet individual needs

Service models

Develop service models based on end-to-end health pathways for earlier and more precise intervention.

Incentives

Establish the right funding models and incentives to enable health improvement and drive greater value across the public and private sectors.

Ecosystem

Encourage better connections in the ecosystem of stakeholders and providers to deliver better health outcomes.

Uplift digital maturity

Digital skills and maturity

Develop programs to improve the digital skills of consumers, clinicians and health professionals.

Digital support

Provide at-hand digital health navigation support.

Education

Education providers integrate digital health into their programmes and offer micro credentials to support upskilling the health workforce.

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