

APAC's healthcare embracing new care delivery model to tackle financial pressures and staff shortages

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"Philips Future Health Index 2023 Report" highlights digital health investments and virtual care expansion as top priorities in the region



Royal Philips, a global leader in health technology, has released the Asia Pacific (APAC) findings of its Future Health Index (FHI) 2023 report: *Taking Healthcare Everywhere*.

The eighth edition of the report, which surveyed nearly 3,000 respondents spanning healthcare leaders and young healthcare professionals in 14 countries, including Australia, Indonesia, and Singapore, shows that a new model of healthcare is emerging in APAC. This model uses technology and data to bring care closer to patients and deliver care in a more efficient and environmentally sustainable way, even as the sector grapples with unprecedented financial pressures and staff shortages.

"For decades, healthcare has been primarily delivered in centralized facilities like hospitals, but this latest report shows that APAC's healthcare leaders are making bold changes as they navigate unprecedented staff and financial challenges," says Caroline Clarke, CEO and Executive Vice President, Philips APAC. "The good news for patients is that this puts them first. We are seeing a shift towards a distributed model of care delivery in APAC that uses smart and connected digital health technologies and data to bring care closer to patients, at home or in the community, to where they are, anytime-anywhere."

New care delivery models for improving efficiency of healthcare outcomes with streamlined execution:

Besides highlighting the potential to broaden healthcare access and improve patient outcomes, the FHI report reveals that embracing new care models will help the region's healthcare leaders to drive more efficient and sustainable ways of working. Two-thirds (66%) of healthcare leaders and younger healthcare professionals say that they are well equipped to work effectively with the new care delivery models, whilst 63% believe care will be delivered in a more environmentally friendly and sustainable way. These beliefs score higher than the global average of 59% and 57% respectively.

The research also reveals a positive impact on staff morale and retention. The majority of the region's healthcare professionals expect the new care delivery models to offer healthcare staff a better work-life balance (58%) and contribute to greater work satisfaction (56%) than traditional healthcare models.

Increased patient compliance and adherence to treatment (44%), improved patient education (36%), increased efficiency (e.g., shorter waiting times, more patients seen), collaboration with local communities to improve population health and more

technologically advanced healthcare (all 35%) are also seen as major benefits.

Successful adoption powered by increased investment in AI, data, virtual care and training

The adoption of new care delivery models in APAC is being powered by increased investment in digital health technologies and the expansion of virtual care to more areas of the healthcare ecosystem.

Digital health records are currently the top investment area for APAC's healthcare leaders (48%). Almost three quarters (74%) of healthcare leaders are planning to invest in AI in the next three years, led by Singapore (84%), followed by Indonesia (76%) and Australia (63%), primarily to predict outcomes (e.g., predict how patients will respond to care plans for more accurate guidance on care pathways, etc.) (39%), for clinical decision support (e.g., in diagnosis or treatment recommendations, early warning scores, automatic disease detection, clinical decision guidelines, etc.) (35%), and to integrate diagnostics (e.g., helping to generate diagnosis from various clinical sources such as imaging and pathology, clinical history, etc) (33%).

The region's healthcare leaders are also moving towards a distributed healthcare model that prioritizes anytime-anywhere care beyond hospital walls by expanding virtual care to more areas of the healthcare ecosystem other than diagnostics – half (51%) of APAC's healthcare leaders say that their facility already provides intensive or critical care support virtually and 42% say they plan to do so in the future, whilst 62% of the region's healthcare leaders say that they are currently providing acute care at home virtually or through in-person visits, and 31% plan to do so in the next three years.

To offer new ways of delivering care, more than half (58%) of the healthcare leaders and younger healthcare professionals in APAC agree that the training available provides healthcare staff with the required skills. Nearly one-third of the healthcare leaders pinpoint data interpretation skills (29%) and staff willingness to adopt new technologies (29%) as success factors in their roll out of new delivery models, whilst 44% of younger healthcare professionals agree that they need better training on new technologies to feel empowered to improve patient care. Having access to more advanced technologies to aid diagnostics (41%) and reduced administrative responsibilities (40%) were also cited as ways to empower them in improving patient care.

Doubling down on digital technologies to tackle staff shortages and work satisfaction

The report also finds that APAC healthcare leaders are at the forefront of using technology to tackle the staff shortages that are becoming a global industry problem. Two-thirds (67%) of them (vs 56% globally) already use, or plan to use, digital health technology to reduce the impact of healthcare workforce shortages. Leaders in Indonesia (77%) and Singapore (75%) are especially focused on this. The top three technologies to relieve the impact of staff shortages regarded by those APAC leaders using or planning to use digital health technology are cloud-based technology to support access to information from any location (44%), technology solutions that connect with out-of-hospital settings (37%) and workflow technology (e.g., PACS, digital health records, patient flow automation) (35%).

Embracing digital transformation and new care delivery models could also help with attracting talent. Younger healthcare professionals identified being at the forefront of AI (39%) and new care delivery models that connect different care settings (33%) as top priorities when choosing where to work. Chat bots providing patients with answers to basic medical questions (33%), portability of healthcare data between hospitals and practices (28%) and ability to access diagnostic capabilities from any location (26%) are cited by younger healthcare professionals as top technologies that will improve their work satisfaction.

Multi-pronged strategies towards a more environmentally sustainable industry

Sustainability remains a high priority for APAC's healthcare industry, but lack of access to appropriate technology (43%), lack of standardization across the industry (37%) and inadequate interest from staff (32%) are cited as challenges preventing APAC healthcare leaders from implementing their sustainability initiatives. To overcome these, the leaders agree that creating a business case for implementing initiatives (42%) and sharing best practice examples (38%) would be key. Additionally, they also believe that working with or consulting a third party to deliver or support sustainability programs and recruiting more staff with specialized skills (35% respectively) would be beneficial to fulfilling their sustainability ambitions.

"A smart, sustainable healthcare ecosystem with digital solutions redefining a human-centric care experience and the work of healthcare professionals will be the future. We're excited to be working with our healthcare partners on pioneering the next decade of patient care," added Ms. Clarke. "Besides providing the right innovations and up-to-date training needed to unlock

the full potential of anytime-anywhere care, we are also cognizant that climate-friendly solutions, practices and infrastructure are important to build a sustainable future for our industry.”

Philips has been working with its partners in APAC on new business models and engaging in long-term strategic partnerships to innovate care delivery. This includes supporting APAC health systems in developing smart hospitals that seamlessly bring together people, data and technology to achieve the industry's Quadruple Aim: improving the patient experience of care, improving the health of individuals and populations, improving the work life of health professionals, and reducing the per capita cost of healthcare. Being aware that services, upgrades, sustainable innovations and practices as well as training and education are key to the long-term success of digital transformation, Philips offers integrated and comprehensive suites of systems, smart devices, software and services, to address the specific pain points faced by healthcare providers and ultimately help unleash the full possibilities of digital transformation.