HOW HEALTHCARE SEES ITS FUTURE

The economy

REGION'S IMPACT

A fair impact — 18
Quite a big impact — 13
A very big impact — 16
None — 19
Very little impact — 34

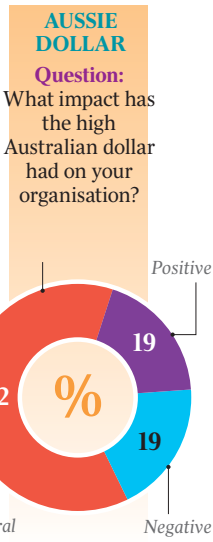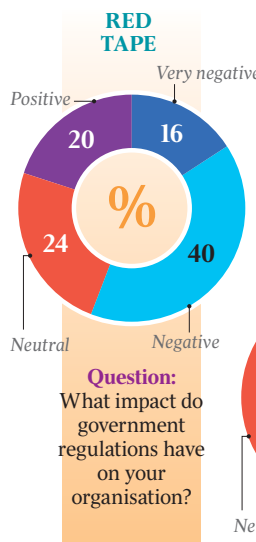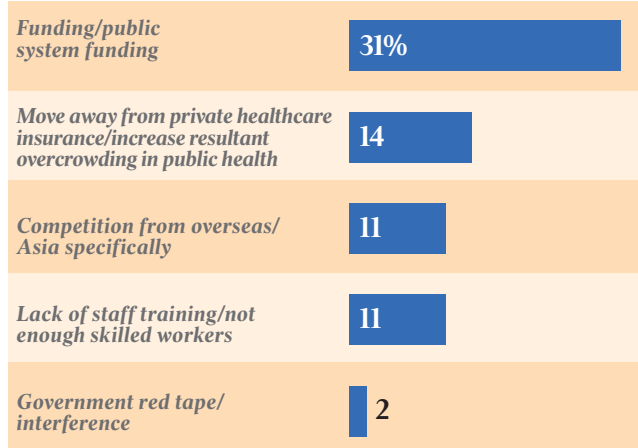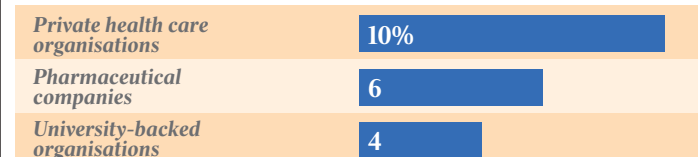**Question:** And what impact does the Asia Pacific Zone economy have on your business?

BIGGEST CONCERNS

What are your biggest concerns over the next few years in relation to the healthcare system?

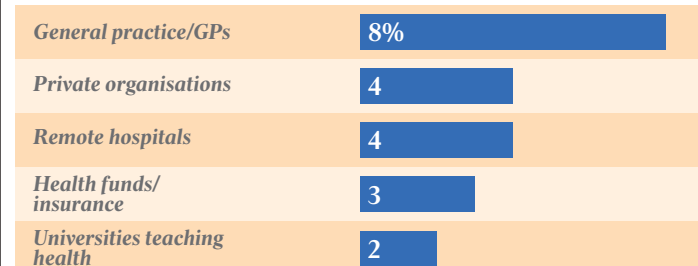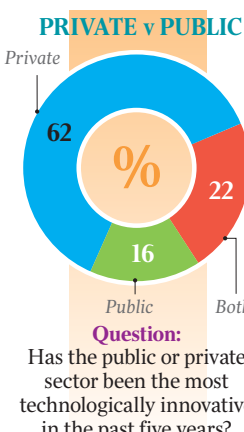| Concern	%
Funding/public system funding	31%
Move away from private healthcare insurance/increase resultant overcrowding in public health	14
Competition from overseas/Asia specifically	11
Lack of staff training/not enough skilled workers	11
Government red tape/interference	2

RED TAPE

Positive — 20
Very negative — 16
Negative — 40
Neutral — 24

Question: What impact do government regulations have on your organisation?

AUSSIE DOLLAR

Question: What impact has the high Australian dollar had on your organisation?

Positive — 19
Negative — 19
Neutral — 62

Organisations in the sector

THE MOST INNOVATIVE

Organisation	%
Private health care organisations	10%
Pharmaceutical companies	6
University-backed organisations	4

WHO HAS MADE THE MOST OF THE INTERNET TO ENHANCE HEALTHCARE?

	%
General practice/GPs	8%
Private organisations	4
Remote hospitals	4
Health funds/insurance	3
Universities teaching health	2

The future for the healthcare sector

PRIVATE v PUBLIC

Private — 62
Both — 22
Public — 16

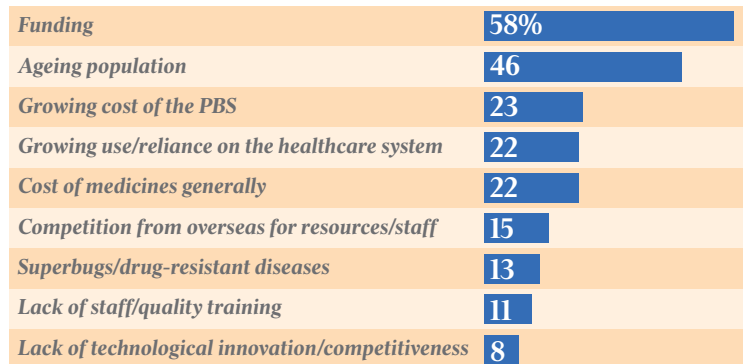**Question:** Has the public or private sector been the most technologically innovative in the past five years?

THE BIGGEST CHALLENGES

What are the biggest challenges facing the healthcare system over the next decade?

Challenge	%
Funding	58%
Ageing population	46
Growing cost of the PBS	23
Growing use/reliance on the healthcare system	22
Cost of medicines generally	22
Competition from overseas for resources/staff	15
Superbugs/drug-resistant diseases	13
Lack of staff/quality training	11
Lack of technological innovation/competitiveness	8

AN EFFICIENT SYSTEM

What are the most important factors for ensuring an efficient and effective healthcare system over the next decade?

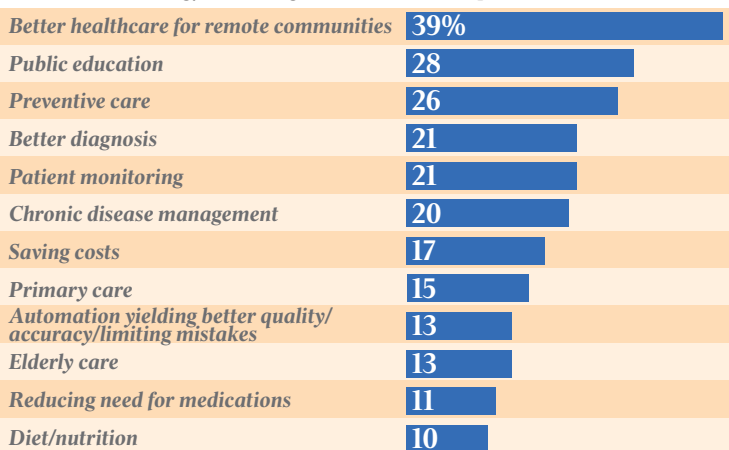| Factor	%
Funding	46%
Greater use of digital/internet technology	27
Advances in drugs/medicines	22
General healthcare reforms	21
PBS reforms	19
Increased government regulations/stable environment	18
Advances in medical instruments/technology	16
Staff recruitment/training	9
Education on techniques and technology	7

85% *believe that companies should get tax breaks or incentives for developing new medical technologies*

87% *believe the internet will change the face of healthcare over the next decade*

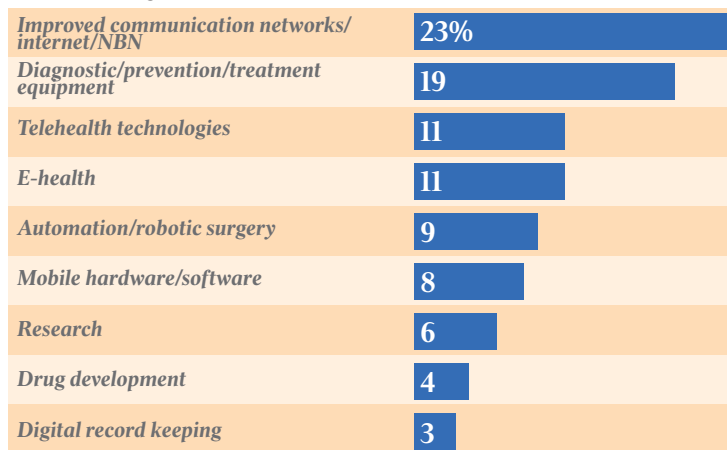**68%** *believe there is a serious skills shortage in Australian healthcare*

TECHNOLOGY'S IMPACT

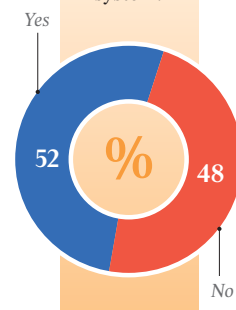Where can technology have the greatest benefit or impact?

	%
Better healthcare for remote communities	39%
Public education	28
Preventive care	26
Better diagnosis	21
Patient monitoring	21
Chronic disease management	20
Saving costs	17
Primary care	15
Automation yielding better quality/accuracy/limiting mistakes	13
Elderly care	13
Reducing need for medications	11
Diet/nutrition	10

AGENT OF CHANGE

What will change the face of healthcare over the next decade?

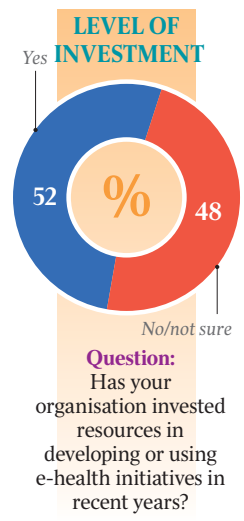|	%
Improved communication networks/internet/NBN	23%
Diagnostic/prevention/treatment equipment	19
Telehealth technologies	11
E-health	11
Automation/robotic surgery	9
Mobile hardware/software	8
Research	6
Drug development	4
Digital record keeping	3

USE OF SYSTEM

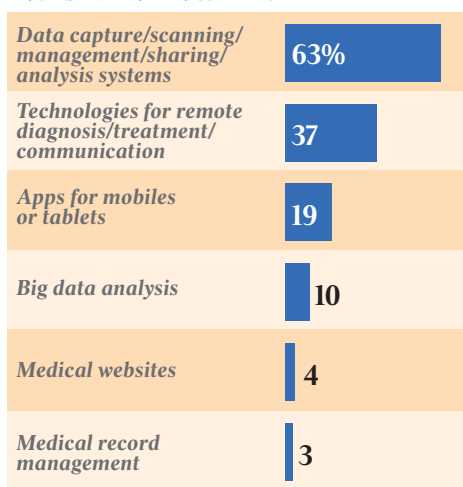**Question:** Are too many people using the healthcare system?

Yes — 52
No — 48

ABOUT THE SURVEY

The survey, conducted for The Australian by Hall & Partners Open Mind, was of 100 professionals from the commercial healthcare sector. There was a good cross-section of company sizes, with a skew towards small/mid-sized companies, reflecting the sector make-up.
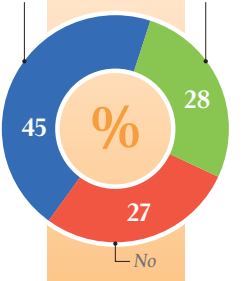
E-Health

LEVEL OF INVESTMENT

Yes — 52
No/not sure — 48

Question: Has your organisation invested resources in developing or using e-health initiatives in recent years?

INVESTMENT IN WHAT?

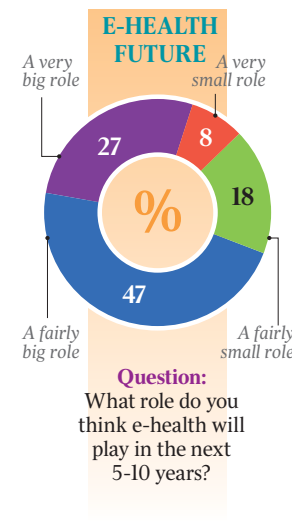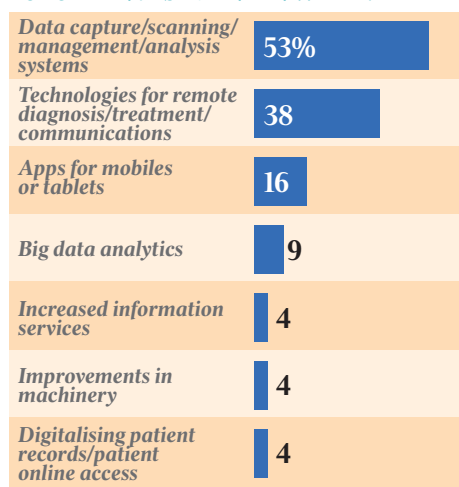|	%
Data capture/scanning/management/sharing/analysis systems	63%
Technologies for remote diagnosis/treatment/communication	37
Apps for mobiles or tablets	19
Big data analysis	10
Medical websites	4
Medical record management	3

PLANNED INVESTMENT

Question: Is your organisation planning to invest resources in developing or using e-health initiatives in the next few years?

Yes — 45
Unsure — 28
No — 27

FUTURE INVESTMENT IN WHAT?

	%
Data capture/scanning/management/analysis systems	53%
Technologies for remote diagnosis/treatment/communications	38
Apps for mobiles or tablets	16
Big data analytics	9
Increased information services	4
Improvements in machinery	4
Digitalising patient records/patient online access	4

E-HEALTH FUTURE

A very big role — 27
A very small role — 8
A fairly small role — 18
A fairly big role — 47

Question: What role do you think e-health will play in the next 5-10 years?

OPTIMISTIC?

Question: How optimistic are you when it comes to the government embracing e-health over the next 5-10 years?

Very optimistic — 4
Fairly optimistic — 34
Very pesimistic — 8
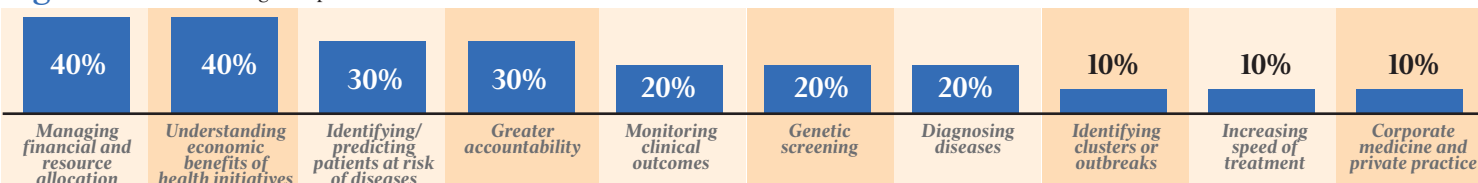Fairly pesimistic — 13
Neutral — 41
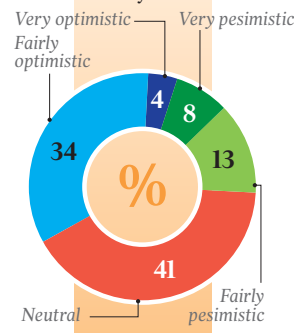
79% *agree that e-health will revolutionise care for remote communities*

55% *disagree that the potential benefits of e-health are exaggerated*

66% *believe that e-health will play a major role in ensuring a sustainable health system*

Big data

Where will big data provide the most benefit?

	%
Managing financial and resource allocation	40%
Understanding economic benefits of health initiatives	40%
Identifying/predicting patients at risk of diseases	30%
Greater accountability	30%
Monitoring clinical outcomes	20%
Genetic screening	20%
Diagnosing diseases	20%
Identifying clusters or outbreaks	10%
Increasing speed of treatment	10%
Corporate medicine and private practice	10%

Of those who know what big data is, only 15% said their organisation was making use of it. But 77% of these believe big data will have a big role in the sector in the next 5-10 years.