

Transforming the aged care experience

Enhancing personalisation, transparency
and family engagement through technology



About PwC

In an increasingly complex world, PwC works with businesses, Government and the community to help Australia continue to thrive and grow. PwC's purpose is to build trust in society and solve important problems. PwC leads the market in identifying and assembling the right mix of collaborators, advisers, subject matter experts and technology, together with our people, to deliver innovative solutions. For over 15 years, PwC has been at the forefront of the transition to digital health in Australia. PwC is a trusted partner helping Australian health organisations adapt to the virtual world. We have a solid foundation in delivering effective digital customer experiences and an ability to articulate and measure the value of digital care. We understand the complexity of the virtual health landscape and a vision for the opportunities it opens up our health, care and wellbeing sectors.

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About Salesforce

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Executive Summary

Safety. Trust. Choice. Experiences. Relationships. These are the things that matter to older Australians in aged care as well as their families. For providers, there has never been a more challenging time to fulfil these needs. The outlook for the next stages of COVID-19 remains uncertain. The industry will soon confront major regulatory and funding reform arising from the outcomes of the Royal Commission.

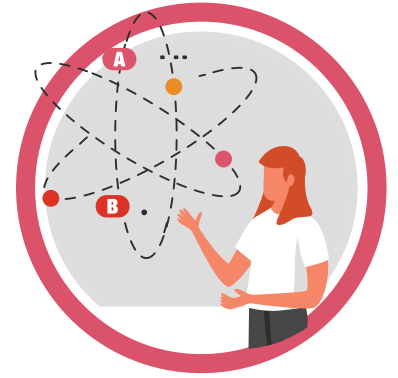
Alongside these extraordinary and difficult circumstances, there is a renewed ambition amongst leading providers to think differently about the future of aged care. How can we create healthier, more fulfilling and connected lives for older Australians? And what role can digital technology play in a new aged care experience? Attitudes and expectations of older Australians towards technology are changing rapidly. Leading providers will seize this opportunity to deliver better outcomes, differentiating their services in an increasingly competitive industry.

To better understand how technology is currently used by aged care providers, PwC and Salesforce collaborated on the Aged Care Customer Experience Study in July 2020 in Australia.

This research explored the influencing factors and customer experience of aged care residents and in-home care recipients, and the close family members and friends involved in their care (who we refer to as decision makers). It looked at current pain points in the aged care sector and how these gaps might be bridged using both emerging and proven technology.

This paper explores some of the insights to come out of this research and what these mean for aged care providers. We also explain why digital transformation doesn't have to be expensive or complicated to achieve significant outcomes; and we outline some practical steps aged care providers can take to get started.

An era of extraordinary change



The aged care sector is experiencing a significant wave of change. There are now more older Australians (those aged over 65) than ever before, placing growing demands on the sector. In the decade to 2017, there was a 17 per cent increase in the number of older Australians living in residential aged care (RAC) and an 85 per cent increase in the number using in-home care.

Alongside the dramatic growth in the need for aged care in our community, expectations and attitudes are changing. A new, diverse and empowered generation of aged care consumers and their families are no longer satisfied with traditional offerings. An expectation of safe, high-quality care is the starting point. The new aged care consumer demands choice, flexibility and personalisation. One size no longer fits all.

At the same time, the regulatory environment is shifting in response to growing demand and new community expectations, and several external factors are challenging business models. These forces include a shift towards consumer-directed care and resulting changes to aged care funding models. The ongoing Royal Commission into Aged Care Quality and Safety continues to impact and influence the sector, as does the changing government standards around quality and safety.

And critically, COVID-19 has accelerated and complicated the drivers for change. For those providers on the front line of the pandemic response, the need to protect the health and wellbeing of vulnerable aged care recipients has led to an increased focus on safety, quality, communication and technology – particularly within RAC facilities. Social distancing requirements are also leading providers to focus more attention on ways to alleviate the isolation and loneliness experienced by many aged care residents and in-home care clients. Success during this difficult period will require providers to support aged care recipients, families and staff through the crisis, while simultaneously adjusting operating models and response strategies.

Meanwhile, providers in areas where COVID-19 may present less of an immediate concern are looking to redefine their strategies in light of the many changes occurring in the sector. For some retirement living providers, this might involve partnering with other organisations to provide in-home care. For a RAC provider, it might mean teaming up with an allied health provider and engaging community and non-government organisation (NGO) players. Already, many large operators are acquiring or merging with smaller providers.

507 respondents across Australia were invited to participate in a 10 minute online survey from 18th to 23rd of July 2020. The respondents were recruited through an online panel and selected to be representative across each Australian state and territory.

The respondent split is as follows:

110
recipients of in-home aged care

93
recipients of residential aged care

149
149 family and friends of in-home aged care recipients

155
155 family and friends of residential care recipients

Many providers are now considering how technology might be used to relieve some of the operational pressures they're facing, and to improve care outcomes for older Australians using their services and for their families.

To find out more about pain points in the sector and how technology might be used to bridge these gaps, we asked 203 aged care recipients and 304 decision makers to share their experiences dealing with aged care providers as part of our Aged Care Customer Experience Study.

This research shows that aged care providers have done quite well in maintaining satisfaction of aged care recipients. Aged care recipients receiving both in-home care and RAC had an average satisfaction rating of 8.1 out of 10. Two-thirds reported their experience has stayed the same or improved over the 12 months. This is good news for a sector facing many challenges.

However, there is room for improvement in the experience provided for families and friends, with decision makers reporting a lower average satisfaction score of 7.7 out of 10. Around half (53 per cent) feel that their experience with their aged care provider has changed for the worse in the last 12 months. This suggests there is an 'expectation gap' between those receiving aged care and their families.

¹ <https://www.aihw.gov.au/reports/older-people/older-australia-at-a-glance/contents/health-and-aged-care-service-use/aged-care>

A changing demographic

The expectations of aged care recipients and their families are changing as the 'quiet generation' gives way to the 'baby boomers'. This new generation of aged care recipients is more tech-savvy, more diverse and more likely to stay in their own homes than previous generations.


According to the Productivity Commission, 83 per cent of older Australians now prefer to age in their own homes for as long as practicable. This is due to a perception that familiar surroundings and stable long-term accommodation result in better physical and mental health within this age group. It is also in line with people's preferences to maintain 'functional independence'.

Older Australians' device and internet usage has also increased significantly in recent years. A survey conducted by the Office of the eSafety Commissioner found that 71 per cent of older Australians have access to a smartphone (or other similar device) every day. Approximately the same number (70 per cent) use the internet multiple times a day. Reasons for accessing the internet include researching potential purchases online, searching for information about government services, paying bills online, internet banking and making bookings.

This familiarity with technology is also evident among aged care recipients. Our study showed that 70 per cent of in-home care residents and 73 per cent of RAC residents rate their proficiency with technology as seven out of 10 or higher. Not surprisingly, the level of proficiency is even higher for decision makers, who are likely to be considerably younger, with 79 per cent of all decision makers rating their proficiency with technology as seven or above.

In this current environment, it's clear that technology has a greater role to play in enhancing the overall resident and family experience in aged care than previously. Our study shows that 77 per cent of all aged care recipients (both in-home and residential) and 69 per cent of decision makers agree that the need for technology in aged care has increased in recent years. Meanwhile, 75 per cent of aged care recipients and 66 per cent of decision makers feel technology is essential to providing high-quality aged care during the COVID-19 pandemic and after it.

75% of aged care recipients and 66% of decision makers feel technology is essential to providing high-quality aged care during the COVID-19 pandemic and after it.



² <https://www.health.gov.au/sites/default/files/documents/2019/12/aged-care-diversity-framework.pdf>

³ <https://www.pc.gov.au/research/completed/housing-decisions-older-australians/housing-decisions-older-australians.pdf>

⁴ <https://www.esafety.gov.au/sites/default/files/2019-08/Understanding-digital-behaviours-older-Australians-summaryreport-2018.pdf>

Aged care's technology deficit

There is an abundance of exciting technology available on the horizon for the aged care sector. This technology ranges from apps that monitor facial expressions to assess pain in non-verbal patients, to wearables that can sense if the wearer has a fall. In the longer term, these solutions have the potential to help aged care providers deliver high-quality care in a meaningful way and support independent and in-home living arrangements.

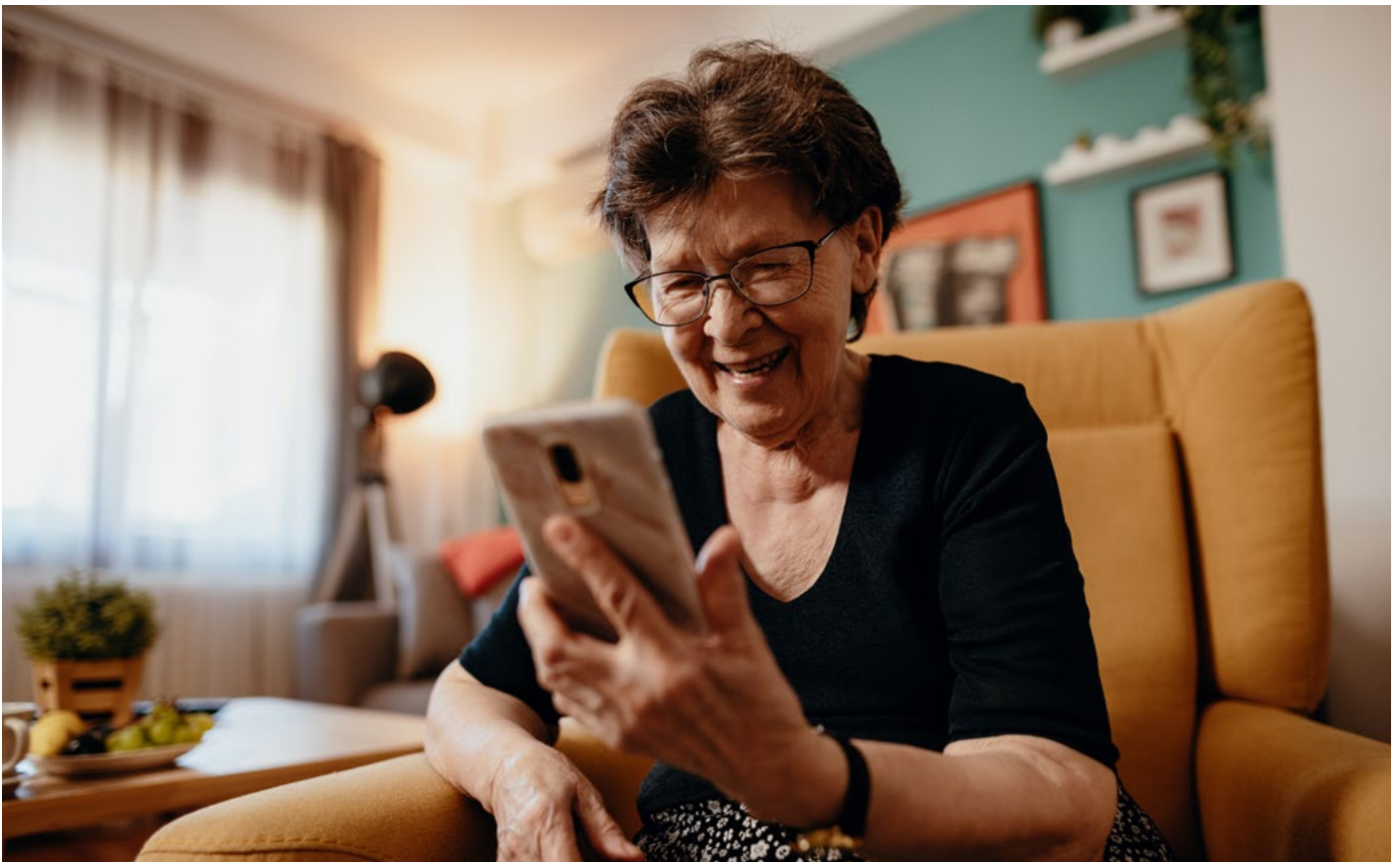
But technology can also help with enhancing resident experience today, such as connecting aged care recipients with their family members and friends through social channels, and by doing so, reducing the impact of isolation and loneliness. Meanwhile, the use of cloud-based platform technologies such as Salesforce can help provide families with information about the care and wellbeing of their loved ones.

In comparison to other industries, the aged care sector has been slow to adopt technology that provides information and services. While some high-end providers demonstrate considerable technological maturity, many others don't even have the basics – such as Wi-Fi, or automated systems for managing care plans. This is negatively impacting the customer experience for aged care recipients and their families.

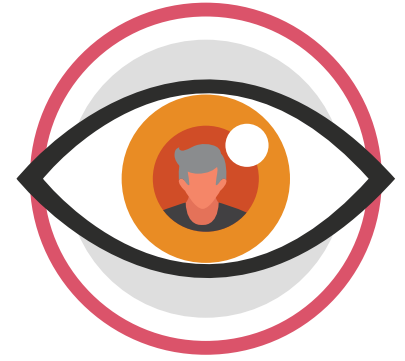
When asked to rate various industries on their use of technology to improve customer experience, respondents rated aged care providers lowest with an average score of 6.7 out of 10. 62% of decision makers and 72% of recipient agree to this statement "Our provider is innovative and focused on continuously improving the quality of service."

While cost of care and the quality of aged staff were the most important areas for improvement by respondents, aged care providers shouldn't ignore the importance of technology. Our research suggests that overall respondent satisfaction is very strongly linked to their perception of how innovative and open to improvement the service provider is.

It also suggests that decision makers think more poorly of the technological capabilities of service providers than aged care recipients do. This is understandable given that these family members are likely to be younger, more technologically proficient and more likely to expect more from their service providers. However, it also means that in situations where the decision maker has a greater say in choosing a provider, a provider's technological capabilities could be the factor that tips the decision in their favour – or not.



Greater transparency, engagement and personalisation is needed



Given the current significant disruption the aged care sector is experiencing, we believe there are several core issues that aged care providers must consider when looking at their technological capabilities. The shift to consumer-directed care will increase the importance of these capabilities in decisions about which aged care provider a recipient or decision maker might choose.

These core areas are:

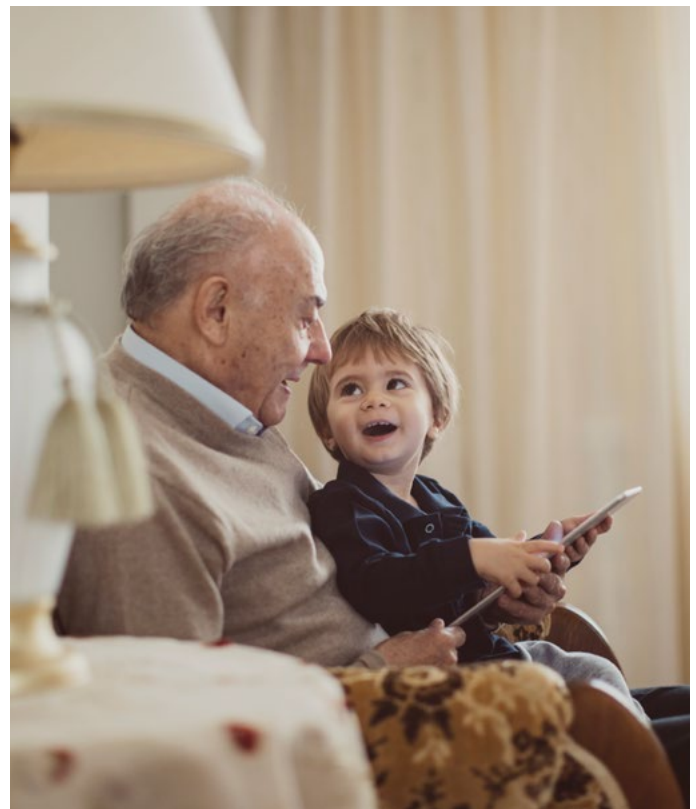
1. Access to information during the decision-making process

Many aged care recipients and their families report a poor experience when it comes to finding the provider that meets their care requirements. For example, more than a third (42 per cent) of decision makers rated their satisfaction with the experience of looking for an aged care provider 6 or less (as 6 is included in the rating).

When survey respondents were given the opportunity to comment, responses included that it is “very difficult to traverse around the system”, “very stressful because it was so expensive and it was hard to compare” and there is “not enough information on what services you can or cannot get”.

Meanwhile, 57 per cent of decision makers and 66 per cent of aged care recipients found it easy to research and compare aged care providers.

Family members also rated ‘more information about services’ as the area they’d most like providers to improve using technology. Clearly there is a significant opportunity for providers to enhance the digital consideration journey for potential customers and their families; both to improve the customer experience and to enhance the effectiveness and efficiency of acquisition for the provider. Technology platforms can provide simple functionality to scale such highly relevant, personalised digital journeys which can occur across preferred online channels.



2. Transparency and visibility about care

Isolation, loneliness and feelings of disconnectedness from family members and friends were a significant issue among older Australians even before COVID-19. However, this issue has been exacerbated by the pandemic, which has seen physical interaction between aged care recipients, families and carers becoming increasingly constrained by public health advice. Many aged care recipients haven't been able to receive visits from family or friends in months.

As a result, transparency around health communication has never been more critical. This was clear from our survey, with more than two-thirds (69 per cent) of decision makers agreeing that COVID-19 has increased the need for visibility into their relative's care, schedule and wellbeing.

Decision makers also ranked 'transparency around care being provided and overall health status' the third most important area that could be improved by aged care providers (after 'cost of care' and 'skills and knowledge of staff').

Currently, 63 per cent of decision makers are satisfied with their level of visibility over their relatives' care, daily and weekly schedule, wellbeing and other updates.

3. Connections with family members, friends and carers

Clinical research into the impacts of loneliness and disconnectedness on physical and mental health factors confirms the need for aged care recipients to feel connected to their families and communities.

In our survey, recipients of aged care services rated 'technology to improve connectivity to family and friends' as the number one area that providers could improve. However, just 59 per cent agreed that their aged care provider was using technology to improve their lifestyle and community connection.

Among decision makers, almost 40 per cent said that their relative's aged care provider wasn't engaging effectively with them as a decision maker and key stakeholder in the care of their relative. This shows that there is significant room for improvement in this important area.

Connecting with families through technologies such as video calls, group chats and online communities was rated the second most important area aged care providers could improve through technology.

Fortunately, the barrier to establishing these types of services is low. There are a large number of communication and collaboration tools readily available. The introduction of subscription-based licensing also means that providers don't need to worry about acquiring and operating depreciating infrastructure. They can simply start using the service and pay for what they need.

Clearly there is an opportunity for technology to help bridge this gap and forge a new connection between relatives and providers. With a variety of technology available to assist; the opportunity exists to enhance the quality of conversations between carers and families, whilst creating peace of mind for families and key differentiation for providers.

4. Personalisation across care and support

There's no one-size-fits-all solution in aged care. Every aged care recipient has specific needs and preferences, and their care should be tailored to these needs. Personalising care and support is particularly important for this group for several reasons. These include:



Control

As people age, they relinquish much of the control over their health and life circumstances. Knowing that the services and support they receive are personalised enables aged care recipients to maintain some independence.



Diversity

Australians in aged care are increasingly diverse. As a result, there is an increasing need for personalisation that considers this diversity. This includes, but is not limited to, employing with diversity and inclusion in mind and providing information in a recipient's language to make it easier for them to understand the services available.



Evolving expectations

Aged care recipients' right to choice and dignity is dealt with in detail in Standard 1 of the Aged Care Quality Standards (Quality Standards)[1], which highlights the importance of aged care recipients being able to act independently, make their own choices and participate in their community. According to the standard these are all important factors in fostering social inclusion, health and well-being.

Unfortunately, 45 per cent of all respondents felt that their aged care provider doesn't deliver customised and personalised care. Almost half (48 per cent) felt that their aged care providers are not using technology to enable a more independent lifestyle.

Setting a vision for person-centred care



The question providers need to consider is how to set a vision for person-centred care. We believe there are several key areas where technology can help providers meet evolving customer expectations, regulatory requirements and enhance differentiation in an increasingly competitive environment.

1 Agility and innovation

The data suggests that innovation and continuous improvement in service quality is the most important driver of customer satisfaction.

The current generation of older Australians increasingly expects a baseline of technology in service provision that supports community connection, improves care outcomes and enables more efficient care.

For aged care providers, innovation in areas such as the Internet of Things and wearables – as well as back-office functions that improve customer experience such as billing – can be important points of differentiation in a sector where consumer-directed care is providing more options for the selection of a care provider.



2 Care personalisation

The need for ongoing assessment and care planning is outlined in Standard 2 of the Quality Standards.

This standard requires aged care providers to get care planning right and to show that they are doing so. However, our findings indicated that it either wasn't happening or that aged care recipients and their families couldn't see that it was happening. For providers that are doing the right thing, this means doing more to ensure that everyone knows what that care plan is.

Nearly one in five (19 per cent) of respondents also listed 'smarter care planning' – such as predicting an aged care recipient's future needs based on their medical history – as one of the top two ways their providers could improve their service through technology. As aged care recipients often require a growing list of services as they age, better co-ordination of care is also needed. In the case of in-home care recipients, providers may need to co-ordinate the planning and scheduling of multiple service providers.

Technology will have an increasing role in allowing service providers and their staff members to plan, initiate, manage and co-ordinate care as traditional paper-based processes give way to more effective digital workflows.

However, just 52 per cent of decision makers and 61 per cent of aged care recipients said their provider uses technology to improve the speed and efficiency of care.

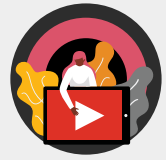


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3

Enhanced family engagement and communication channels



Decisions around aged care can be fraught with emotion and even guilt for family members, particularly when they involve an older person moving from their own home into residential care.

For family members, knowing their loved one is being cared for is critical. In practice, this means having visibility into the details of their care, ranging from the staff members caring for their relative to whether they needed a dressing changed or attended a social event. This is particularly critical now, with social distancing and healthcare restrictions limiting visitors to many aged care facilities.

An online community portal where family members can access updates, social calendars, photos and details of scheduled events is one way that aged care providers can help family members feel more connected between visits. Confidential details of a loved one's care can also be made available securely to authorised family members or medical practitioners.

Ideally, this should be just one element of a multichannel approach to connecting and communicating with family members. Such an approach may involve aged care providers using email newsletters, online communities, text messaging, phone contact and virtual meetings to engage with aged care recipients' families.

Unfortunately, there is clearly still some way to go with achieving this level of engagement. Currently, just 38 per cent of aged care recipients' friends and families are able to access information about their loved one's care via an online portal.

Engaging with prospective clients and their families during the customer acquisition journey is another area where providers need to step up their efforts; about a third of survey respondents (36 per cent) reported that they found the experience of looking for an aged care provider difficult. More than a third (40 per cent) of survey respondents found it hard to research and compare providers online, and a third reported that email and web enquiries were not handled well.

4

Ongoing feedback and improvement



Standard 6 of the Quality Standards requires aged care providers to have a system in place to resolve complaints. The system must be "accessible, confidential, prompt and fair" and it should support aged care recipients and their families to make a complaint or give feedback.

With the needs of care recipients constantly changing, feedback can help providers optimise the type and quality of service offered to aged care recipients and their families. This is essential to ensure high customer satisfaction throughout the aged care journey.

Providing aged care recipients and their family members with direct feedback mechanisms, such as an online survey builds trust and a sense of connection with the aged care provider.

Social listening – monitoring what is being said about an organisation on social media channels and elsewhere online – can be a good way to keep track of sentiment in the community that may impact an aged care provider's brand positively or negatively. Once an organisation is aware of what is being said about them, they are then able to act on it.

Closing the loop by acknowledging and acting on feedback helps to reinforce trust and can help avoid losing customers to another provider. Acknowledging and responding to broader issues and themes affecting the sector, such as the publicity surrounding the Royal Commission, is another important step towards building trust.

Currently, 67 per cent of care recipients' families believe that their feedback and complaints will be handled well and in a timely fashion.

Practical steps for getting started

There is a common misconception that digital innovation can only be achieved by investing a significant amount of money and time. In fact, if structured the right way, digital innovation can be cost-effective and have an enormous impact on aged care recipients, families and staff – and much faster than you might imagine.

Fortunately, large programs of work that focus heavily on data manipulation and significant workflow change in foundational projects have fallen out of favour. Even large companies with extensive in-house IT departments find these to be expensive, complicated and slow to deliver return on investment. Instead, organisations are now typically looking to deliver digital transformation projects in bite-sized ‘agile’ pieces that produce tangible benefits quickly, before moving onto the next stage.

For the aged care sector this means focusing on projects that will create an immediate difference for aged care recipients and their families, as well as to staff members and carers on the front line of care. But where should you begin as an aged care provider embarking on a digital transformation project for the first time? We’ve put together this four-point plan to help you get started.



1. Formulate your vision

Formulate a vision for the type of service experience you want to create. This involves working out the changes that are most important for your organisation and recognising that you won’t be able to achieve everything in one go. It also involves aligning key stakeholders, including your executive team, with your organisation’s objectives.

With everything that’s going on in the aged care sector, assessing what needs to be done and how to do it can seem like an overwhelming task. Start by describing what kind of organisation you want to become and what’s important to you; identify the outcomes you want to achieve from your strategy; and then plot a roadmap to get there. In this situation, seeking advice from an external consultant can be helpful to assess your current and future requirements and address the specific challenges your organisation faces.



2. Understand customer pain points

A mistake many organisations make is to approach digital transformation from a purely operational point of view. Instead, it’s better to look at this transformation through the lens of the people being cared for and their families. What are aged care recipients most concerned about? What do family members want from the customer journey? Do you have a system in place to gain insights into your customer’s journey, their behaviour and their carers’ perceptions?

Once you understand the pain points from the customer’s point of view, you may find there are opportunities to leverage or incrementally improve existing technology to relieve some of that pain.

By approaching digital transformation from a customer-first perspective, you will be in a better place to deliver personalised experiences that increase trust and the level of care you’re able to deliver. Ultimately, this will help to improve the overall happiness and satisfaction of aged care recipients and their families.



3. Prioritise projects for maximum impact

You won’t be able to tackle everything on your technology wishlist at once, so prioritise projects based on where the maximum impact is for those older Australians in your care, their families and the staff members who care for them. Involving users in the design of technology solutions often results in better outcomes.

Listen to the feedback aged care recipients and their families are giving you and act on their suggestions. A simple-to-use customer relationship management (CRM) solution will help you to better understand aged care recipients’ behaviour and their preferences, collect information and feedback from family members, and help you make insightful data-driven decisions about future priorities.

For aged care recipients, this might be a platform that allows them to communicate with their families between visits – via video calls, for example – and support from staff members to use it. For care providers, it might be a mobile platform that allows them to update an aged care resident’s digital care plan or schedule an appointment for them to see a doctor on the spot, rather than having to arrange it later. Or it might be technology that helps carers plot the most efficient route between in-home care clients’ homes and then scheduled appointments.



4. Continuously improve

With the right foundations in place, start to layer on apps and solutions that will allow you to continually improve the customer experience you offer to aged care recipients and their families. A holistic and flexible platform such as Salesforce can be a key asset here, enabling your technology to assist and grow with your transformation, rather than creating further complexity across multiple disconnected point solutions.

For example, if you have an internal library of knowledge articles, consider making them available to family members via a self-service channel. This allows them to access information on their own terms and can reduce the numbers of calls that staff members receive. From there, a next step might be to add in collaboration functions, such as the ability for family members to ‘like’ and comment on photos, or to make personal information about an aged care resident available to authorised family members and medical professionals.



Lending a helping hand



Many consultants qualified to advise on digital transformation can also help with the implementation phase. For example, at PwC we work with Salesforce to support our clients in starting their digital transformation journeys. We do this by combining business strategy, award-winning solutions powered by Salesforce, and our experience in aged care to improve non-clinical service and quality of care controls that enable customer-led growth.

Our Empowered Aged Care solution has been developed by PwC and Salesforce specifically for the Australian RAC sector. This digital tool kit gives RAC providers a head start on their digital transformation goals by addressing the key concerns of residents, their families and staff members. This includes guidance on how to increase the personalisation of experiences for residents; how to monitor and engage residents in new ways and enable relatives to be involved; and how to connect residents and their families digitally.

Ultimately, we know that aged care providers are doing the best they can. We also understand that the sector is subject to significant pressure from forces beyond the control of providers and this is putting them under enormous stress. Having the right technology in place can remove some of that pressure and make it easier for organisations to get back what they do best: looking after the health and wellbeing of older Australians.



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