

Digital Health Trends

2022

There's no question our health system faces a challenging year ahead but, with the right foundations, there should be confidence in our ability to not only manage - but thrive.

It's a cautious optimism. 2022 sees Aotearoa New Zealand - and the rest of the world - entering the third year of the COVID-19 pandemic, with a health system under strain from the ongoing response, new variants emerging, supply chain shortages that are expected to worsen, an increase in flexible and hybrid working that is likely to become embedded as a part of the new normal, and workforce shortages across all industries.

Concurrently, we have the largest sector reform ever seen here. This includes the establishment of Health NZ, the Māori Health Authority, a centralised Public Health Unit and the new Ministry for Disabled People. From July 1 these new entities will be functioning, and the public health workforce and assets will transition to these new organisations.

Amongst this, it's easy to lose sight of the outcome we're collectively working towards which centres around the health and wellbeing of people.

Digital health has a key role to play in this, and has already been fundamental to our COVID-19 response, with the adoption of the NZ COVID Tracer app, My Vaccine Pass, automated access to COVID test results, and the accelerated adoption of telehealth or virtual care. Digital is a core strategy to achieve an omnichannel system of healthcare delivery that balances virtual and in-person care, and empowers individuals to take control of their health.

PwC's Digital Health Trends 2022 is set against the backdrop of these drivers, which we've combined with PwC's commitment and responsibilities to Te Tiriti o Waitangi and equity in health care, and a growing focus on sustainability and ethical decision making.

Consumer Access and Participation

People in Aotearoa New Zealand have experienced increased access to their own health information, with consumer generated information via the NZ COVID Tracer app, a vital part of our COVID response. The health sector responded with astonishing speed to the COVID-19 pandemic and rapidly shifted work onto virtual platforms and digital technologies. This has packed almost a decade's worth of reforms into a very short period. This will expand with the response to the Omicron variant to include uploads of Rapid Antigen Test (RAT) results.

Having experienced this as part of the COVID response, health consumers will increasingly expect the same levels of access to their own health information, such as vaccinations and test results, and to be able to better share their own health experiences, outcomes, symptoms and data. This will be enabled through the first tranche of Hira, the Ministry of Health's data and digital service, which will lead to New Zealanders having better access to and control over their health information.

In January 2021 PwC conducted a survey of over 10,000 consumers in 10 countries, including Australia, to obtain insights on people's healthcare experience during the pandemic, and their readiness to adapt to change. [This research](#) presents a clear picture - rather than revert to normal there is a huge opportunity to reimagine healthcare as it progresses to the new normal.

To meet the health needs of New Zealanders, we have a responsibility to improve how they are involved in co-designing our health system and digital health tools. Consumer participation in data and digital health governance, co-design and access will be a significant trend over the next 12-24 months. This is reflected in the draft Pae Ora (Healthy Futures) Bill that mandates the development of a Code of Consumer Participation.

Digital Health Workforce Shortages

Workforce shortages across both the health sector and information technology sector will converge into an increasing shortage of experienced and qualified digital health expertise.

As demand for talent in specialist areas such as cyber security, data integration, API development and clinical informatics grows, health organisations need to compete with other industries to attract and retain talent. This presents challenges with digital health programme delivery and drives an increasing need for a flexible and scalable workforce, while also driving up remuneration packages. Successfully managing this requires organisations to develop strategies that prioritise the design of their digital health workforce and pipeline.

Finding innovative ways to attract a new workforce through apprenticeships, training, secondments and leadership development are key to developing a new digital health workforce. Internationally, the workforce shortage means many healthcare providers are outsourcing back office tasks, which has seen healthcare business processing (BPO) emerge as a solution. [ReportLinker](#) forecasts the international healthcare BPO sector to grow to almost \$450 billion by 2027, increasing at a CAGR of roughly 8.9% from 2020 to 2027.

Digital Health Equity

Our collective responsibilities to ensure that the health system is equitable extends to data and digital health. This includes equitable access to digital health tools and services, and health data that captures ethnicity and the social determinants of health. This allows the drivers of inequitable service provision and health outcomes to be better understood and addressed, and enables the design of initiatives to address digital literacy and access to devices.

However, it's vital that we don't increase inequity through the application of health data and digital tools such as Artificial Intelligence or Machine Learning. Where the COVID-19 response catapulted the use of digital, it also highlighted the need for people to have access to email, internet and a smartphone, creating further barriers to participation for our most vulnerable population groups like the elderly, Māori, and Pacific peoples.

As such, the establishment of the Māori Health Authority and the Ministry for Disabled People will be instrumental in requiring health providers and organisations to improve the participation of Māori and other population groups in the co-design and governance of digital health initiatives.

Sustainability

An increasing focus on sustainability and environmental, social and governance (ESG) factors across all sectors will increasingly be of importance in digital health procurement and implementation.

Organisations will be seeking to procure digital health solutions and infrastructure that is sustainable, ethical, considers social responsibility across the entire supply chain, and supports new facilities seeking a Green Star rating. Sustainability requirements will increasingly be seen within functional and non-functional requirements during procurement processes, and industry providers will be expected to demonstrate and adhere to their sustainability and ESG credentials.

Omnichannel

The provision of virtual health care as a result of COVID-19 restrictions is both an international and national trend. We are used to understanding synchronous telehealth provisions, occurring in real time between providers and consumers. The demand for asynchronous telehealth will grow, driven by consumers who are seeking similar interactions from the health system that they experience in other aspects of their lives; when it is convenient to them and using channels that they are increasingly familiar with, such as health platforms on mobile phone, text and messaging apps. This trend has been accelerated as a result of the rise in hybrid and remote working.

There will be work to determine which virtual visits make the most sense, where and how they should take place, and which health users these will appeal to.

PwC research shows the use of non-in-person models of care increased significantly across all cohorts during the COVID-19 pandemic. Before COVID-19, only one in five people aged 45+ had received care virtually, however during the pandemic this has increased to one in two people aged 45+. This has encouraged the adoption of virtual health services for older generations, who may have previously been uncomfortable or technologically unsure about the medium.

Health organisations that embed and optimise existing telehealth services and extend these to offer asynchronous health care and data sharing will be well placed for the future and changing demands from health consumers.

Conclusion

Ultimately Aotearoa New Zealand has an opportunity to better invest and innovate in health digital and data, to address our aging technology and applications. Through strategy and implementation planning, and the coordination of effort and resources we can improve our health data quality and ability to share. There is considerable opportunity to improve the accuracy of contextual health data at the point of care, improve information sharing with health consumers, and between providers and agencies, and drive more efficient use of health resources and system performance through data insights.

About us

Our Data & Digital team brings trusted expertise to provide best practice solutions, service design, operating models and stakeholder engagement. We work with Government agencies, PHOs, public and private hospitals and providers, social sector agencies, Māori and Pacific health organisations, and industry providers.



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