



Catastrophic injuries

The future of care: is technology the answer?

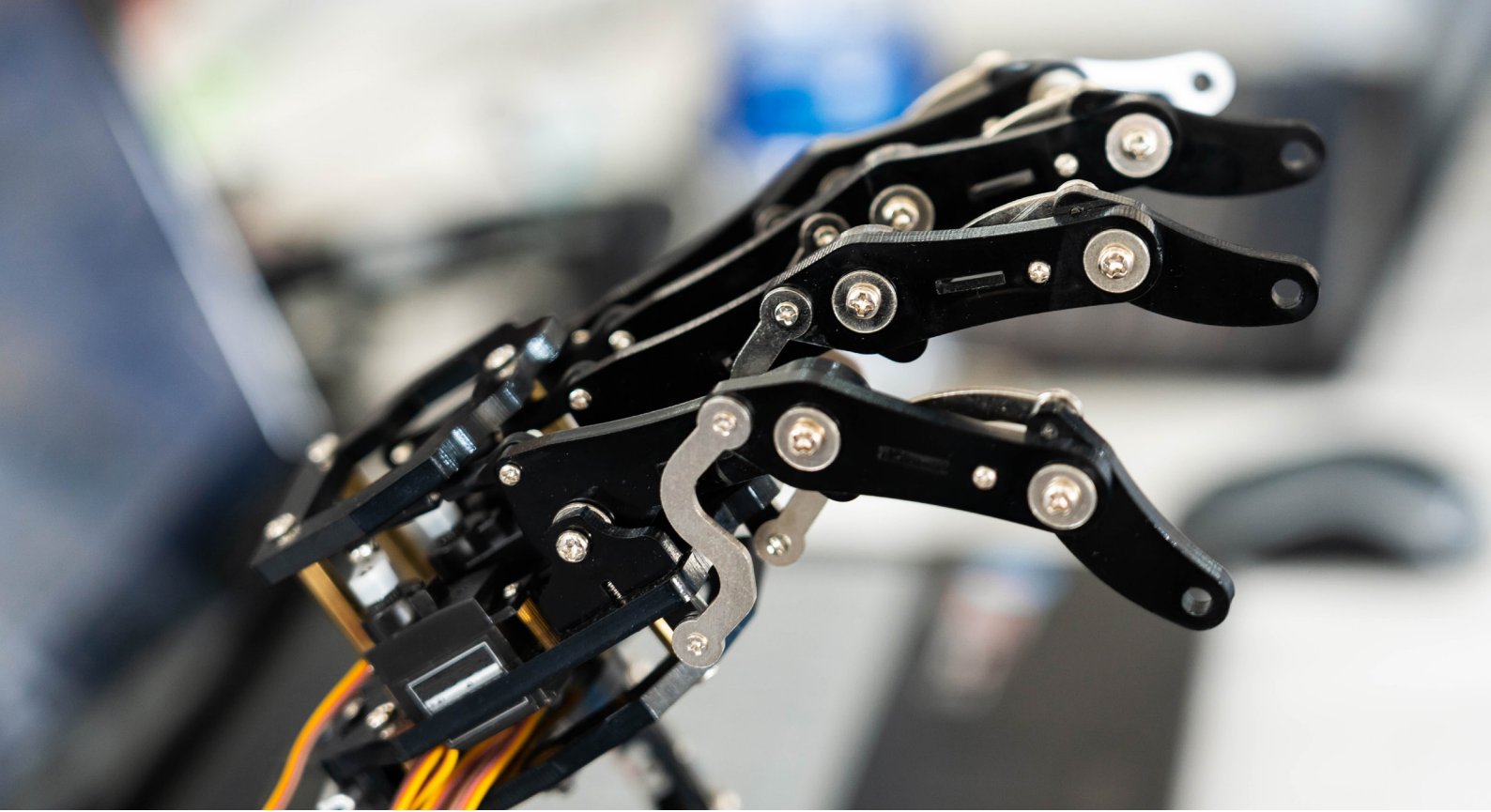
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Executive summary

This report looks at who currently bears the cost of funding personal care for those with catastrophic injuries, and the need to better manage these costs in future. We explore how care needs are assessed, how the injured person seeks financial compensation to meet those care needs, and how those care needs are delivered through a changing combination of personal care and assistive technology.

Supporting the needs of patients and carers

With care packages potentially costing in excess of £400,000 per year, efforts are needed to manage the financial and human costs of caring. With over seven million people in the UK providing care for their family members this is not simply a matter which impacts on the injured person but also on the wider family members who may be called upon to provide informal or gratuitous care. When asked the best way to meet our future care needs, the most popular public response argues that we should simply increase healthcare funding through general taxation:

- 51% of Australians and 45% of Britons support increased healthcare funding via the taxpayer. Although still the most popular option in the US, support for increased taxation is lower, with a third (33%) of people agreeing.
- However, the second most popular solution involves providing care through different models which help to reduce the overall costs by relying more heavily on technology. 29% of respondents supported the need for more technology in helping to drive more efficient and cost effective care delivery models. This is seen as being particularly important for those who rely on public healthcare systems to fund their care needs.
- A quarter (25%) of people in Australia and the US support a greater role for private insurance in shouldering care costs. This compared to under a fifth (19%) in the UK.

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For most people outside of a compensation scenario, the optimal care package will include some element of both personal care and assistive technology. Achieving a balance between the two will depend on the individual case. There is no 'one-size-fits-all' approach. Future care packages for catastrophic injury claims should similarly consider how technology and human care can be optimised in combination to achieve the best possible outcomes.

Several obstacles will need to be overcome in speeding up the adoption of new technology. Many of our industry experts highlighted the role of some claimant solicitors in advocating personal care as a tactical means of maximizing the value of their client's damages claim. The application of assistive technologies may be overlooked in the claims setting precisely because they may help to reduce the cost of care and lead to a lower overall compensation award. The insurance industry may also need to review current practices and policies. Rehabilitation experts highlighted how video conference consultations would not have been approved by health insurers until the recent COVID-19 outbreak where social distancing has now made face-to-face consultations more difficult.

Adapting healthcare provision to meet the needs of a new generation

In order to understand the public mindset towards adopting technology for healthcare needs, our research benchmarked how technology is being adopted more widely in our daily lives. Nine-in-ten people are now using digital technology daily. However, the use of healthtech lags behind other forms of technology:

- 71% in the UK make use of technology for things like online shopping whereas 61% make use of digital messaging services.
- In contrast, just 23% use technology to help them manage their health through apps and other digital tools.

Currently, the general public believe that we do not have the right balance with the use of technology being under utilised in healthcare provision. Our findings do suggest that public expectations regarding availability of new healthcare technologies are moving faster than industry experts.

- The general public expects the uptake of healthtech to take place within the next five years.
- In contrast, industry experts expect a slower rate of adoption taking place over the next 10 to 15 years.

Both the consumer research and our in-depth interviews revealed that part of the shift in the adoption of healthtech will come about through a cohort shift. Younger people are now technology savvy and access a whole variety of services digitally living much of their social lives online too. As younger people who are more familiar with how to use technology age over time, we can expect to see their demands on the healthcare system change the way that healthcare is provided.

- Those aged between 18-34 are more likely to have used technology on the recommendation of a medical professional.
- On average across the UK, US and Australia, 45% of those aged between 18-34 have used a health app or website compared to only one-in-ten of those aged over 55.

The in-depth interviews showed that, when considering care package requirements for someone with a catastrophic injury, IT skills and lifestyle preferences play a significant role in deciding what are the best long-term care options. One example was of a younger patient who was technology savvy and valued the independence that healthtech could bring to his life over the daily routines that personal care would have involved.



The general public expects the uptake of health technology to take place within the next five years.

Awareness of healthtech currently available

Another reason for the low take up is that health-related technology is still a nascent market. It will take time for people to adopt this technology and integrate it into their everyday lives as trust and familiarity increases over time.

- Awareness of online video GP or therapy appointments varied significantly across countries, with nearly half (48%) of people having heard of it in the UK compared to only a quarter (25%) in the US.
- Over half (peaking at 54% in the US) have heard of health apps but the awareness levels fall to just 17% for innovations like telecare personal SOS alarms. Only 18% of people in Australia had heard of electronic medication dispensers.
- Across all these technologies the experience of direct usage was typically in the low single digits.

Part of the challenge will be improving awareness of what technology is available and where it can be accessed. This extends beyond the general public into the realm of market practitioners. Even seasoned but time poor medical professionals or case managers may habitually recommend approaches they are familiar with, without considering what other technology-led options are available. Developments in assistive technology are occurring at a rapid pace. This can make it difficult for health professionals to keep up to speed with developments and to build experience and familiarity with the technology. In the context of catastrophic injuries, case managers would need to have technological solutions at front of mind when thinking about and designing long-term care. Currently, this may not be the case reducing the likely take up of assistive technology.



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Applying technology to transform a lifetime of care

The general public perceive the benefits of technology in transforming the quality of care across many fronts.

- Over half of respondents (peaking at 62% in Australia) believe technology can empower people living with catastrophic injuries, giving them a greater sense of independence.
- Over one third recognised the cost-efficiencies which might arise.
- One quarter thought that technology would be more reliable than humans (for example, the human carer might not show up on time or at all).




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