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THERE'S A WINDOW OF OPPORTUNITY FOR TELEMEDICINE INNOVATION RIGHT NOW, AND IT SHOULDN'T BE WASTED.

9 December 2020 - Extended Press Release

Thanks to Covid-19, telemedicine is having its moment: regulations have been temporarily relaxed, and digital innovation in the country is sky-high. But when the pandemic recedes, and regulations revert back to what they were, what then for digital healthcare innovation?

A new research briefing paper by inter-disciplinary consultancy, Percept, has highlighted how Covid-19 created an urgent need for telemedicine services in South Africa, in order to protect both the vulnerable members of the public, and healthcare workers. As a result, telemedicine guidelines have been temporarily relaxed by the Healthcare Professions Council of South Africa (HPCSA).

"Our data from telemedicine providers show there has been sizeable growth in the demand for telemedicine services in South Africa since Covid-19 and the resultant lockdown," says Shivani Ranchod, CEO and healthcare actuary at Percept. "It also shows there is great potential to improve healthcare quality and access. However, there's currently limited evidence for or against the impact and efficacy of telemedicine. Retaining the current, more flexible approach to telemedicine regulations would provide a window of opportunity for further data collection."

Through extensive interviews with telemedicine industry stakeholders, including funders, service providers and users, the Percept research analysis on how the pandemic and the changes in the South African telemedicine regulations have impacted the South African telemedicine market, offers a way forward.

Stakeholders interviewed said telemedicine can play a key role in promoting preventative care which is known to lead to lower healthcare costs and improved population health. The tele-triage providers interviewed had experienced great success in reducing the number of in-person doctors' consultations during lockdown, lowering the number of patients going to healthcare facilities. One tele-triage provider, that was utilised largely for Covid-19 screening, had 97% of interactions with users resolved without a face-to-face referral. This would likely mean less congestion and better experiences at the healthcare facilities.

Another provider had 80% of their virtual consultations resolved without a physical visit at a time when they had over 1,000 virtual consultations. This provider also found that patients who used virtual consultation services generally experienced high rates of satisfaction with the service. One provider's self-reported customer satisfaction data for September 2020 showed that 86% of patients who responded to their survey said they were 'very satisfied' that the virtual consultation addressed their medical needs or concerns. This shows great potential for telemedicine to reduce the burden on the healthcare system, by meeting patients' needs outside of health facilities and at their own convenience.

"It's imperative that the industry be given the time and the regulatory space to develop so that more evidence on the impact of these models can be gathered to inform future regulatory decisions," says Ranchod. "For the regulatory bodies to revert back to previous regulations without sufficient research and evidence would set South African digital health innovation back by years."

The report goes on to say that although regulation is an important factor for enabling the development of telemedicine, reimbursement models are also crucial in driving the uptake of telemedicine solutions among healthcare workers. Telemedicine consultations are broadly reimbursed by medical schemes at lower rates than face-to-face consults. If this rate is too low, doctors will not be incentivised to provide these services and uptake will remain low.

The Percept analysis recommends that telemedicine providers themselves have a role to play too, in creating an enabling environment for market development. Greater cooperation among providers in creating systems which can be easily integrated and are interoperable is vital in designing solutions that best meet client needs.

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Making the case for sustainable telemedicine in South Africa



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The lack of integration leads to siloed solutions which contribute to a fragmented care pathway for many clients, and will likely discourage uptake.

Telemedicine has the potential to increase access to quality healthcare while reducing costs to patients and the health system, so it is important to integrate it, as part of the routine practice of medicine. This should be done through ensuring that existing regulations allow for the practice of direct-to-patient telemedicine, with or without a prior relationship with the healthcare practitioner. Telemedicine needs to form part of the training of healthcare professionals, which will in turn, improve the quality of virtual consultations.

“We would like to see serious debate around telemedicine in South Africa, while the momentum and innovation is behind it,” says Ranchod. “Other African countries such as Rwanda and Kenya are already using telemedicine to expand access to specialist care to rural areas and achieve universal health coverage. We are very open to engaging with both the HPCSA and the National Department of Health – both of whom didn’t engage prior to the publication of the report.”

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