oneAdvanced

ANNUAL BUSINESS TRENDS REPORT 2024
A PRESCRIPTION FOR TECHNOLOGICAL CHANGE

HEALTHCARE SECTOR

INTRODUCTION

An internet search of 'UK healthcare on its knees' brings up a worryingly long list of articles published in the media over the last 12 months. None of us can afford to flinch away from the issues that have been plaguing the healthcare sector for years, and are getting worse. While there is a sense that the sectors are at breaking point, the annual OneAdvanced Trends Report looks at the ways that technology is transforming the way organisations are managed, with innovations driving more efficiency, greater productivity and providing better return on investment. These are trends that could make a positive difference to the delivery of healthcare in the UK.

The success of the healthcare sector is crucial for our economy. Without adequate healthcare at primary and secondary levels, and adequate care provision for our older people, we will all struggle to live, work and thrive. Maintaining the health of the nation is an absolute requirement.

Our survey finds that staffing continues to be the big issue. Organisations are facing challenges at all stages of the employment journey, with hiring, staff retention, and meeting employee needs and expectations. We highlighted these same problems in 2022's survey, when almost half told us that staff retention was a priority for the next 12 months. Unfortunately, despite highlighting this priority, no sufficient improvement has been recorded and instead the problem appears to have grown this year.

Improving the talent pipeline may be one of the answers. Healthcare recruitment could benefit from more creative and proactive approaches, that will almost certainly require government intervention. This could include initiatives designed to help support attraction and retention of higher numbers of suitable candidates, by engaging with young people in schools, colleges and universities, and with retraining programmes for older workers.

Even with sufficient people on the team, there are challenges with managing day-to-day deployment and rostering appears to be very challenging. Although rostering technology exists, some software appears to be underperforming and letting managers down at a time when they need consistently reliable solutions. Automation tools and artificial intelligence (AI) can help drive more flexible and reactive systems. As yet these are not being widely implemented and a significant minority of healthcare professionals don't believe either of these emerging technologies will help.

We asked a specific set of questions to GPs to gain insights into some of the challenges facing primary care providers now. It highlighted the issues they have with time – reception teams lacking time to answer every call, and GP partners struggling to meet all of a patient's needs within the allocated appointment timeslot. Lack of time with patients is a decades-old problem. Partly this is because the guideline for GP appointment is just 10 minutes. Longer appointments will of course mean that fewer patients can be seen each day, but this problem is exacerbated by a shortage of GPs in many surgeries and partners having to balance business management processes with medical time.

Digital solutions have become widely embedded in many industry sectors, because they have been proven to help speed up processes. In healthcare this would help ensure more patients get more of a professional's time, in many cases leading to better outcomes. They can also help staff deal with the avalanche of demand, proving the employee experience which in turn helps drive more engagement, creates a happier workforce and improves retention.
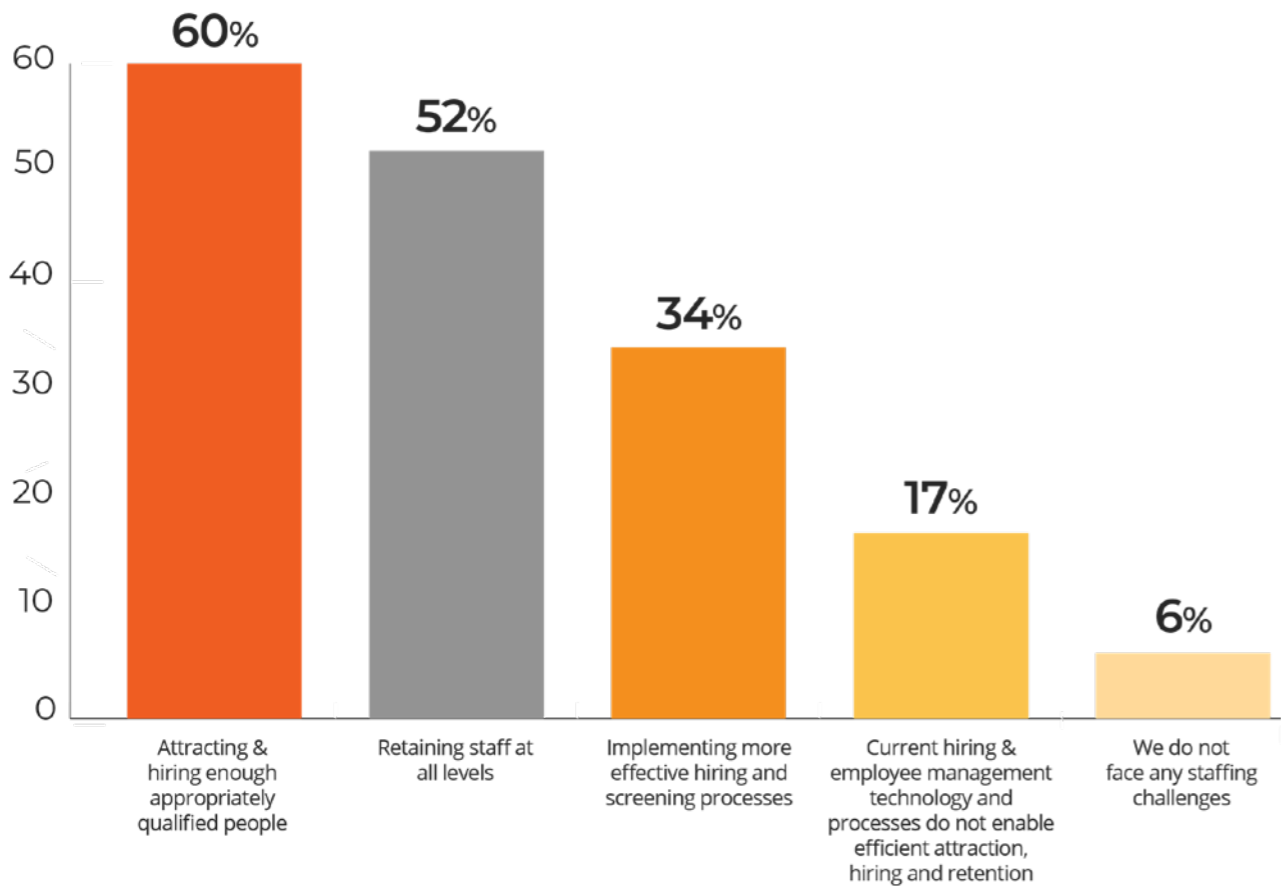
WHO WILL CARE?

Staff attraction and retention continues to be a challenge this year and there is little to suggest this will change in the near future.

In 2022, 27% of respondents working in the NHS and other healthcare providers said employee retention and development was a core business priority. When asked about where their leadership was placing its focus, 30% said it was prioritising investment in the right talent, while 31% said supporting and nurturing the talent within the organisation, and 31% said their leaders were focusing on strategies to support flexible working and 21% said the focus was on treating employees as individuals. Taken as a whole, this list of priorities and leadership focus all points to an identified need to invest in people. However, 2023's data indicates that these strategies have yet to yield results.

What are the main staffing challenges your organisation faces?

Challenge	Percentage
Attracting & hiring enough appropriately qualified people	60%
Retaining staff at all levels	52%
Implementing more effective hiring and screening processes	34%
Current hiring & employee management technology and processes do not enable efficient attraction, hiring and retention	17%
We do not face any staffing challenges	6%

58%

say that retaining staff leaving the sector for less demanding work is the number one retention challenge

Instead, the staffing conundrum in 2023 appears as significant as ever. 60% of healthcare professionals say attracting and hiring enough appropriately qualified people is the number one staffing challenge this year, while more than half (52%) say it is retaining staff at all levels. 34% say implementing more effective hiring and screening processes is a challenge, while 17% have issues with their current hiring and employee management technology, saying that processes do not enable efficient attraction, hiring and retention. Only 6% of healthcare professionals say they face no staffing challenges at all.

With around 1.4m people employed in the UK healthcare sector now, a growing ageing population with more complex health and medical needs is driving a requirement for more staff, year on year. Employee attraction is one side of the coin, the other is retaining existing staff. Our survey reveals the main retention challenges that are affecting the sector now. 58% say that retaining staff who are leaving the sector for less demanding work is the number one retention challenge, and 45% say it is providing sufficient promotion opportunities to retain the best staff. For 38% of respondents, implementing effective performance management processes is an issue, while 27% identify the challenge of retaining older, experienced staff, including consultants and GPs, who are seeking to retire early or reduce hours. Just 7% say they have no staff retention challenges.

BUILDING THE
TALENT PIPELINE

People seeking to work in healthcare want decent pay rates, but other factors, such as career development opportunities, and feeling valued, play a part in decision-making.

Tackling employee attraction and retention challenges requires strategies that help overcome some of the current employment issues that staff face. Pay tops the list, with 46% saying there is not enough basic pay, and 28% say there is not enough overtime availability to increase take-home pay. Many qualified and experienced people are leaving the sector for lower stress and higher paid careers and it is crucial that leaders find ways to keep them. One way to help address this is to improve the standing of the health and care sector within society, with pay rates that reflect the value that healthcare professionals bring to our lives. Solving staffing issues will not be an overnight fix without sufficient budgets to fund significant, widespread pay increases in the public and private sectors.

Besides being paid sufficiently, people have other motivations for seeking a career in healthcare, such as improved longer-term prospects to support a better lifestyle, and

work that offers them fulfilment and job satisfaction. Our survey shows more than one-third (35%) say a lack of promotions and other career development opportunities is an issue, and another 35% say lack of training and further qualification opportunities. Employers who invest in their staff, providing career opportunities backed up by training and additional qualifications, are more likely to increase retention rates.

Another issue for staff is lack of flexibility, as some want to be able to fit their job in with other commitments such as childcare. Flexibility may be the deciding factor for some candidates choosing to join or stay with an employer. 36% say one of the issues for staff is not having the hours they need to fit in with other commitments, while 29% say it there is too much stress and not enough hours in the day. Effectively managing workload is crucial if staff are not to become burned out, stressed and have to take time off sick to be able to cope.

28% of staff say there is not enough overtime availability

The majority, 60% of healthcare professionals believe that government policy could help alleviate staffing issues by supporting a pay increase for all employees, while 54% think government should introduce more specific benefits such as tax incentives for healthcare staff, and 41% believe it should increase pay at entry level and low levels.

Investing in promoting careers in healthcare is another strategy for raising the status and attractiveness of the sector. 38% think the government could promote health care careers more effectively in schools, colleges, universities and via public information campaigns, and 36% believe an investment in new routes into medicine and care, via apprenticeships and other courses, could help alleviate the problem.

In reality, building a sustainable talent pipeline is a long-term strategy that will require many different approaches and methods, including those flagged in our survey. In the shorter term, addressing staffing challenges may require further flexibility around immigration and visas for overseas healthcare workers. But it will be crucial to develop an experienced and qualified domestic workforce that can grow sustainably with increasing need.

36%

say staff are not getting the hours they need to fit in with other commitments

TECHNOLOGY IN A HUMAN SPACE

People-focused healthcare professionals are turning to technology to help them increase their time with patients and manage complex but arduous tasks such as rostering.

Technology may not be able to solve all of the staffing issues raised in our survey, but it can significantly improve the employee experience, helping create a more attractive career path and reduce some of the pressures of long hours and overwhelming workloads. Implementing appropriate software and intuitive platforms can help employees achieve more in less time, by speeding up repetitive time-consuming processes. This enables people-focused healthcare professionals to spend more time with people, using their innate caring and interpersonal skills.

One area where technology has the potential to transform employee experience is in rostering, the process of allocating the right numbers of appropriately skilled people to the required jobs. One-third (33%) of respondents tell us that matching the hours staff want with the hours on offer is a struggle and 26% say current rostering technology and processes do not enable effective rostering. Many will still be engaged in the thankless task of juggling names within spreadsheets, indeed 21% say another common challenge for staff is working with outdated technology and processes that take too long.

Implementing more effective and appropriate software can make rostering easier, ensuring that all time is optimised so staff have time to do their jobs effectively, plus find time for training

and development that enriches their work and helps build their career. Instead, 21% currently struggle with scheduling statutory training sessions within available working hours.

More than half (53%) of healthcare professionals say they struggle to find enough permanent staff to fill all rostering requirements, and 46% say finding enough qualified agency staff to fill occasional/additional requirements is a challenge. Meanwhile, 42% say high rates of staff absence makes rostering difficult. Protecting workplace health and wellbeing can be a challenge when there are too few employees to cover all of the tasks and inevitably, some people will feel overloaded.

There is clear evidence that healthcare professionals recognise the potential value of implementing more effective technology, as 54% say they have plans to upgrade their digital systems. The intention is to improve a number of common challenges, in many cases starting with those that will make the most impact in future. 19% say they want digital tools for faster and more accurate diagnosis, 18% are seeking technology that connects NHS providers more closely with adult social care provision, aligning resource availability to reduce the problem of bed blocking. 17% of healthcare respondents want digital tools to help patients/clients manage long-term, chronic conditions at home.
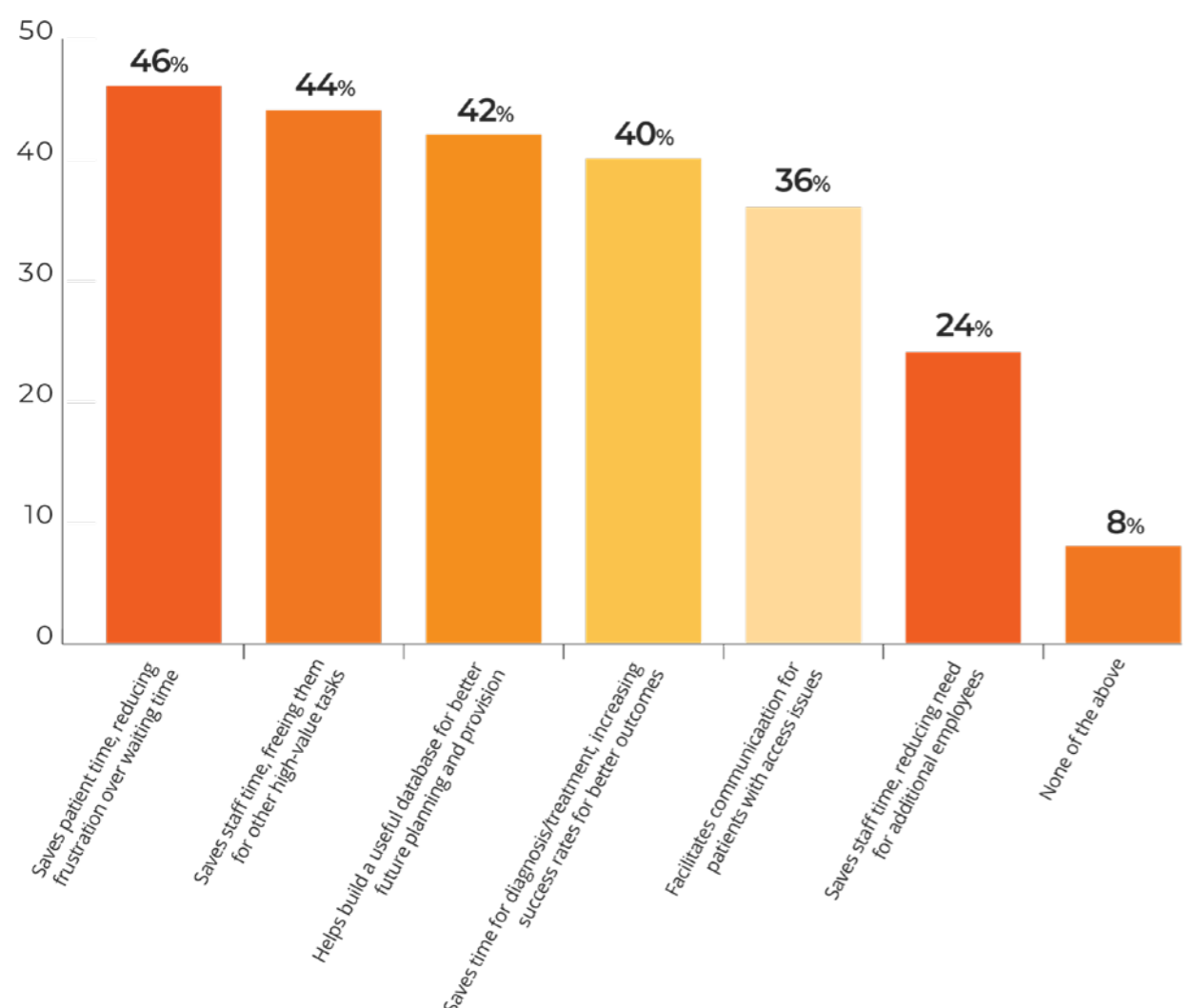
21%

say working with outdated technology and processes that take too long is a problem for staff

AUTOMATION & AI,
THE MAGIC BULLET?

Healthcare professionals can name a number of potential benefits from implementing AI tools, from better diagnosis to improving telephone communications, but they are behind the average when it comes to actual implementation.

Artificial Intelligence (AI) has dominated conversations within many organisations in 2023, with countless articles and political discussions focused on the potential benefits and risks of this powerful emerging technology. Healthcare professionals are keen to examine the ways that AI and other automation technologies can improve productivity and efficiency within their sector. In 2022, 32% said they were using automation in everyday processes, and this has grown in 2023.

This year 38% of respondents say they are using automation tools in many areas of non-patient facing processes such as updating records, analysis of patient information for trends, HR processes, finance, and more. One quarter (25%) are now using automation in many areas including patient facing processes such as telephone answering and automated emails, while 21% are only using automation in some management processes such as HR and finance.

One of the reasons for the increase is that healthcare professionals recognise the benefits of automating some processes, and 46% say it saves patient time, reducing frustration. 44% of respondents say it saves staff time, enabling them to focus on higher-value tasks, while 42% say it helps build useful databases for better future planning and provision.

In what ways do you see automation making the greatest improvements to your processes?

Category	Percentage
Saves patient time, reducing frustration over waiting time	46%
Saves staff time, freeing them for other high-value tasks	44%
Helps build a useful database for better future planning and provision	42%
Saves time for diagnosis/treatment, increasing success rates for better outcomes	40%
Facilitates communication for patients with access issues	36%
Saves staff time, reducing need for additional employees	24%
None of the above	8%

A significant four in 10 (40%) of healthcare professionals believe automation can help save time for diagnosis and treatment, increasing success rates for better patient outcomes, which must surely be one of the most important reasons to implement this technology within the healthcare sector. Also, 36% say automation facilitates communication with patients with access issues, that might include vision or hearing loss, or even with automatic translation software for non-English speakers.

While only 12% say they are already using AI in many areas, a significant 36% are using AI in some processes now. This total of 48% represents an increase from the 30% of healthcare professionals who said they were using AI to some degree in their working life in 2022.

Indeed, many now recognise some of the numerous ways that AI will make improvements to processes in healthcare. 37% say it can improve efficiency dealing with telephone and online consultations, and 33% say it will improve patient outcomes in face-to-face appointments, helping staff deal with the volume of calls and requests for appointments, and ensuring human resources are targeted at those who need it most.

AI is expected to play an important role in diagnosing medical conditions, and 34% believe it will support more accurate diagnosis by medical professionals, with 15% saying it will help provide immediate diagnosis for triage and appointment priority purposes. It can help in the management of healthcare organisations too, and 35% say AI will improve forecasting and planning, enabling them to provide a more tailored and efficient future service. One-third (33%) believe AI will drive more effective buying, procurement and supply chain management, helping reduce and manage spend for greater efficiency. 31% improve staff performance management processes, taking us back to the need to manage staff in a more effective and engaging way to help support employee attraction and retention strategies.

36%

of health professionals are using AI in some processes now

GENERAL PRACTICE
UNDER FIRE

GPs are the first point of contact for many patients, based within the communities they serve and coming under increasing pressure to meet growing demand under ever-tighter time constraints.

Our survey targeted some questions directly to General Practice, as the frontline service providers often acutely impacted by wider challenges in the sector. We found the greatest challenge for GP reception teams were struggling to be able to respond to all callers during peak times and the morning rush. 46% of reception teams have this problem, as so many calls are concentrated during the first hours of each day. Some practices are dealing with this by implementing automated telephone services, or employing additional staff, sometimes off-site, to deal with the morning rush.

46% of reception teams also struggle with dealing with patient expectations around waiting times for appointments and follow up. There are simply not enough GPs and practices to serve the growing numbers of people within their expected timeframes. 32% of reception teams say managing the online appointment and patient communication platform is a challenge, while

24% cite managing the sheer number of calls they receive during the day. All of this points to overload for reception teams that could, at least in part, be alleviated with the implementation of suitable technology.

The biggest challenges for GP partners also relate to insufficient time, with the number one challenge (43%) being keeping appointments running to time, followed by 33% who say managing new patient expectations, 30% describe the biggest challenge as balancing management tasks with clinical time, while 11% say they do not have enough time with patients. In many cases GPs are also the leaders and managers of their own business organisation and 35% find it difficult to make and manage succession plans, while 26% have challenges managing their staff.

Within our wider set of questions for all job roles and industry sectors, we found that GPs have different challenges compared with the average.

27% of GPs named growth and ability to scale as their number one business challenge this year, and in joint second place and each at 25%, attracting and retaining talent, cybersecurity, and meeting patient demand. This is out of step with the average for all roles and sectors, where 41% named talent attraction and retention as the clear number one challenge, with growth and ability to scale down in fourth place.
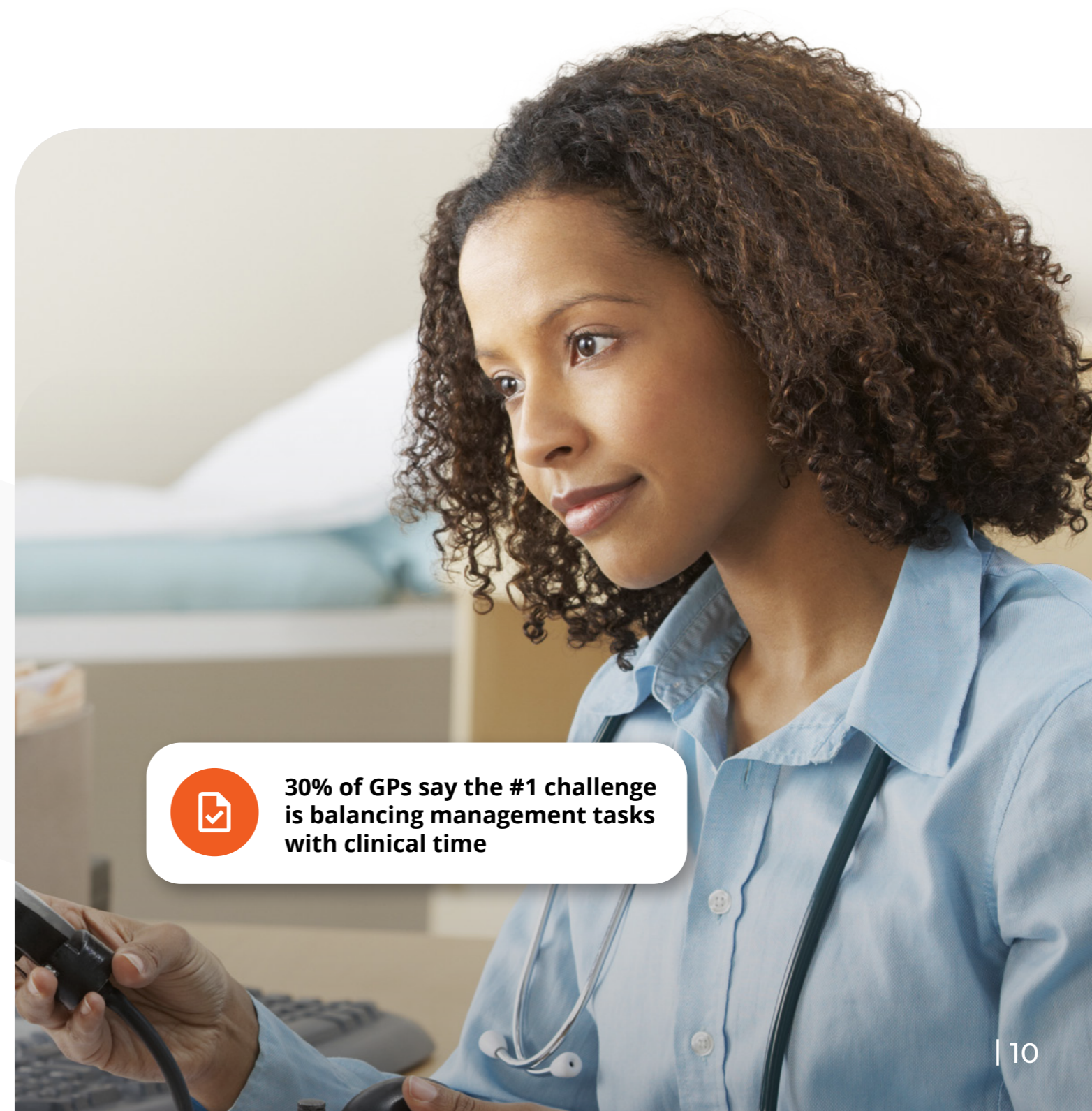
30% of GPs say the #1 challenge is balancing management tasks with clinical time

46%

of reception teams struggle to respond to all callers during peak times and the morning rush

Similarly, GPs say boosting efficiency and productivity is their number one business priority for the coming year (41%) followed by growth (38%), and digital transformation (33%). However, the top priority for respondents across all roles and sectors is 41%, who are focusing on talent attraction and retention.

We can only speculate as to why GPs are less concerned with staffing challenges than other healthcare professionals. Perhaps because the average practice size is around 22.5 people*, which is certainly much smaller than the average hospital. It's difficult to know exactly how the number of staff affects attraction and retention rates, but this challenge is definitely pipped by practice management concerns for GPs. The majority (65%) of GPs say they have plans to upgrade their digital systems and 45% are seeking greater functionality from their technology solutions. Improving practice management processes including more efficient telephone systems, allocation of appointments, employee performance and other management processes, frees up GPs and their teams to focus more of their time on patients.

Based on NHS Digital numbers for FTE GPs, nurses, direct patient contact staff, and admin/non-clinical staff divided by the total number of practices in England, and serves as an estimate only for average practice size based on employee numbers.

REPORT
SUMMARY

POWERING
THE WORLD
OF WORK

OneAdvanced is one of the UK's largest providers of business software and services, serving 20,000+ global customers.

We've been supporting NHS, independent healthcare organisations and care organisations for over 20 years with innovative software that helps manage workflows, reduce costs and improve patient safety, with inbuilt regulatory compliance.
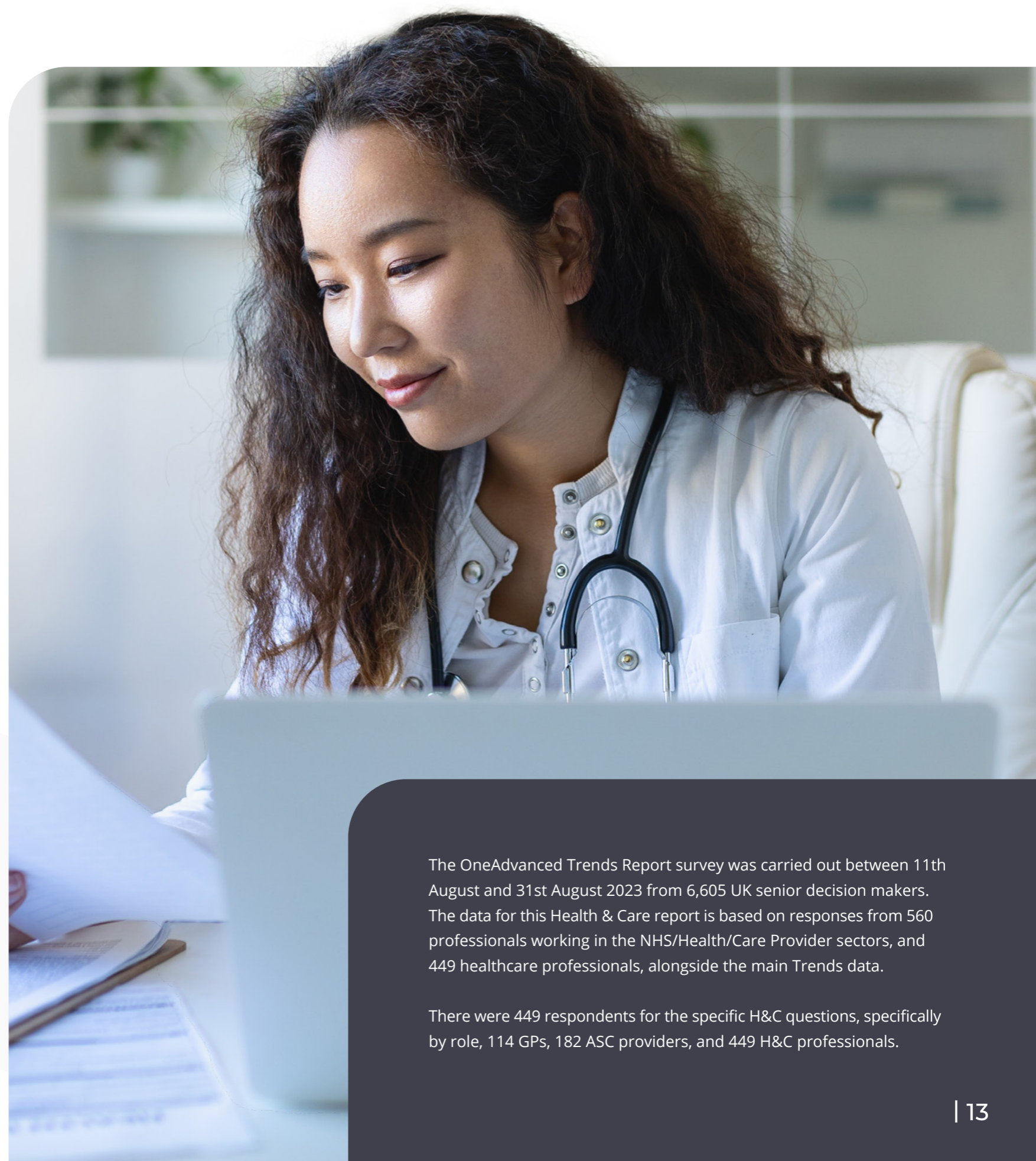
The OneAdvanced Trends Report survey was carried out between 11th August and 31st August 2023 from 6,605 UK senior decision makers. The data for this Health & Care report is based on responses from 560 professionals working in the NHS/Health/Care Provider sectors, and 449 healthcare professionals, alongside the main Trends data.

There were 449 respondents for the specific H&C questions, specifically by role, 114 GPs, 182 ASC providers, and 449 H&C professionals.

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