Sona.

Digital Investment in Social Care

What providers want

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Executive summary

The digital revolution has arrived. Fuelled by government and regulatory priorities, 2023 is shaping up to be a massive year for technology adoption in Social Care. We surveyed 250 Social Care leaders about their attitudes towards digitisation and their plans for the next 12 months. Here's what we learned:

The pull of digital transformation is stronger than the push
- 44% of respondents took a generally positive view of digital transformation.
- However, 58% said their organisation is under significant pressure to digitise quickly, rising to two thirds among providers with more than 100 employees.

The majority of providers will invest more in technology over the next financial year
- Investing in digital is a priority for 62% of providers, with 51% expecting to increase their technology spending, compared to 31% spending less.
- The ability to generate better data and insights, improve operational efficiency, and maintain and improve quality of care are the most significant driving forces for tech investment.

Critical systems dominate providers' technology shopping lists
- More than 90% of organisations will be procuring either digital care planning, e-rostering, or e-mar over the next 12 months, reflecting the increasing maturity of these software categories.
- There is growing appetite for AI, with 1 in 4 providers planning to invest in AI capabilities.
- Ease of use and reliability were tied first in the list of most important factors when evaluating new technologies, with price third.

Many organisations are taking a 'big tent' approach to purchasing decisions
- 45% of the time, at least 10 people are involved in approving the purchase. 25% of respondents said 20 or more people are involved.
- Unsurprisingly, budget constraints are the sector's biggest procurement challenge. However, the results also highlighted lack of technical expertise and interoperability of disparate systems as major concerns when evaluating new technologies.

What does this all mean for digital transformation in Social care in 2023?

1.

Generating structured data has never been more vital. Further digitisation, for example in areas like AI and automation, depends on structured data that can be easily analysed and exported.

2.

The care tech ecosystem will become increasingly integrated. As providers add increase their reliance on technology across service areas and departments they will need more of their systems to work together seamlessly.

3.

**Closer collaboration between care providers and their technology suppliers.** Providers won't just be buying products, they'll be working in true partnership with suppliers at all stages, from customisation, to implementation, and evaluation and continuous improvement.

02

Methodology

We surveyed 250 industry decision-makers during March 2023:

- All respondents were pre-screened to confirm they are currently employed in UK health and social care in a management or leadership position.

- All respondents completed all 15 questions via an online survey conducted by an independent third-party research company.

AGE

- 18-24: 18%
- 25-34: 24%
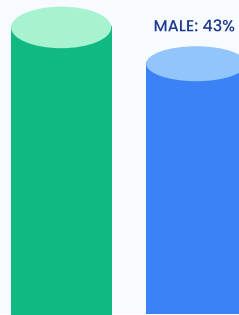- 35-44: 26%
- 45-54: 19%
- 54 OR OVER: 14%
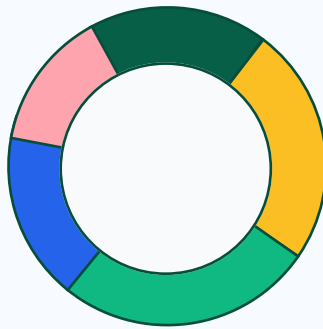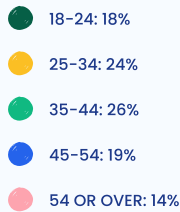
GENDER AT BIRTH

FEMALE: 57%

MALE: 43%

ORGANISATION SIZE BY NUMBER OF EMPLOYEES

For consistency, we will use the following terms throughout the report:

SMALL OPERATOR
1-100 EMPLOYEES

LARGER OPERATOR
101+ EMPLOYEES

Analysis

✧ Attitudes to digital transformation

How do you feel about digital transformation in Social Care?

	● ORGANISATIONS WITH 100 OR FEWER EMPLOYEES	● ORGANISATIONS WITH MORE THAN 100 EMPLOYEES	OVERALL
I'M REALLY EXCITED ABOUT ITS POTENTIAL	20%	35%	**26%**
I CAN SEE HOW IT WILL MAKE THINGS BETTER	14%	27%	**18%**
I CAN SEE THE ADVANTAGES BUT I HAVE CONCERNS	25%	19%	**23%**
I KNOW IT'S NECESSARY BUT IT'S VERY CHALLENGING	20%	14%	**18%**
I THINK IT'S OVERHYPED	20%	5%	**15%**

When it comes to how digital transformation is perceived, less than half (44%) of respondents had an overall positive outlook.

There was an obvious split in our sample between the smaller and larger providers. More than a third of those working at larger providers (101+ employees) said they're excited about the potential of digitisation. Almost two thirds (62%) expressed a favourable opinion.

The proportion drops to 34% for small providers (1-100 employees), with just one in five saying they're excited. Much of that hesitancy likely stems from concerns over whether they have the necessary skills and knowledge to bring new technology into their organisations.

Lack of technical expertise was the top challenge cited by respondents from small providers who didn't express a positive view of digital transformation. 47% said this is a top three challenge when procuring technology, compared to 37% of respondents from larger providers.

There were also some notable differences depending on the seniority of respondents. Board-level professionals were the most likely to be sceptical, with more than one in five saying they think digital transformation is overhyped. Senior managers showed the most enthusiasm for tech's impact in their organisations (56%).

How do you feel about digital transformation in Social Care?

	MIDDLE MANAGEMENT	SENIOR MANAGEMENT	BOARD LEVEL	OVERALL
I'M REALLY EXCITED ABOUT ITS POTENTIAL	18%	36%	22%	**26%**
I CAN SEE HOW IT WILL MAKE THINGS BETTER	21%	20%	16%	**18%**
I CAN SEE THE ADVANTAGES BUT I HAVE CONCERNS	33%	14%	25%	**23%**
I KNOW IT'S NECESSARY BUT IT'S VERY CHALLENGING	16%	23%	16%	**18%**
I THINK IT'S OVERHYPED	13%	8%	21%	**15%**

No matter what their appetites for digital transformation are, what's clear is that the majority feel the need to press on with getting it done. 58% said their organisations are under significant pressure to digitise quickly.

The government's deadline for switching to digital care records – now less than a year away* – is undoubtedly contributing to these feelings of urgency. Improving their organisations' capabilities in generating and analysing data was a top three priority at every leadership level:

To what extent do you feel pressure to digitise quickly?

	ORGANISATIONS WITH 100 OR FEWER EMPLOYEES	ORGANISATIONS WITH MORE THAN 100 EMPLOYEES	OVERALL
WE'RE UNDER SIGNIFICANT PRESSURE TO DIGITISE QUICKLY	53%	67%	**58%**

Top 3 reasons why care leaders need more technology

OVERALL

1. Better data and insights
2. Improve operational efficiency
3. Maintaining/improving quality of care

MIDDLE MANAGEMENT

1. CQC - regulation and compliance
2. Better data and insights
3. Improve operational efficiency

SENIOR MANAGEMENT

1. Improve operational efficiency
2. Meet workforce challenges
3. Better data and insights

BOARD LEVEL

1. Better data and insights
2. Maintaining/improving quality of care
3. Meet workforce challenges

However, just 44% of providers currently have a dedicated person or department with responsibility for data analytics. One reason why the majority have not yet developed this capability could be a lack of usable data, either because it isn't collected centrally or only exists in unstructured formats which can't be easily interrogated.

So many will be looking to the technology suppliers they work with to support them on this front. 40% of respondents said that the quality of the analytics and reporting available was one of the three most important factors when evaluating new systems (see page 9).

Since the middle management level in Social Care likely includes a significant proportion of registered managers, it follows that this group would be most concerned with how tech can help them with their regulatory responsibilities.

✦ Tech investment priorities for this financial year
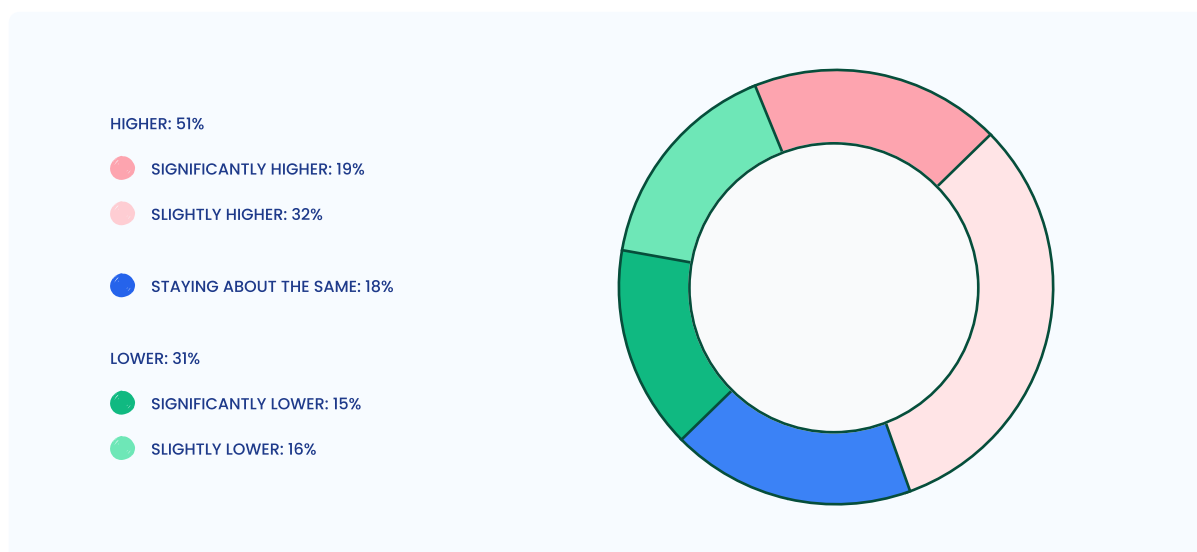
How much of a priority is investing in new technology and systems for your organisation during your next financial year?

	ORGANISATIONS WITH 100 OR FEWER EMPLOYEES	ORGANISATIONS WITH MORE THAN 100 EMPLOYEES	OVERALL
VERY HIGH PRIORITY	36%	29%	34%
HIGH PRIORITY	24%	42%	28%
TOTAL	**60%**	**73%**	**62%**

The pressure providers are under to digitise quickly is reflected in their financial plans for the next financial year. Despite continued funding issues and the resulting budgetary pressure the sector is under, many more leaders plan to spend more on tech over the next twelve months.

Digital investment is a high priority for nearly two in every three Social Care organisations. Just 16% of respondents indicated that it was a low priority for them. The number of providers anticipating spending more on technology in their next financial year is 60% higher than those expecting to spend less.

How do you expect your technology spending to compare with the previous financial year?

HIGHER: 51%

● SIGNIFICANTLY HIGHER: 19%

● SLIGHTLY HIGHER: 32%

● STAYING ABOUT THE SAME: 18%

LOWER: 31%

● SIGNIFICANTLY LOWER: 15%

● SLIGHTLY LOWER: 16%

51% of respondents said that investment will increase, with 31% indicating lower spending. The larger providers showed a larger appetite for tech spending (65% higher spending, 20% lower spending). More than half of small providers will spend the same or less than they did the previous financial year.

Generally, there was little meaningful correlation between respondents' attitudes towards digital transformation and their organisations' investment plans. However, there was one small quirk - 40% of respondents who think digital transformation is overhyped said they expect their technology budgets to shrink.

The top 5 tech investment priorities for care providers:

OVERALL	● ORGANISATIONS WITH 100 OR FEWER EMPLOYEES	● ORGANISATIONS WITH MORE THAN 100 EMPLOYEES
1. Backend systems (including finance)	1. Backend systems (including finance)	1. Digital care planning
2. e-rostering	2. e-rostering	2. e-mar
3. e-mar	3. Payroll	3. Backend systems (including finance)
4. Payroll	4. Assistive technologies	4. e-rostering
5. Digital care planning	5. AI	5. CRM

2023 will be remembered as a landmark year for AI, largely thanks to ChatGPT's rapid rise to fame, and it appears that the Social Care sector won't be missing out on this trend. More than one in four providers (27%) plan to invest in AI this year, perhaps reflecting more widespread awareness of its potential. A similar number (26%) are looking into assistive technologies, too.

Providers are also looking to invest in three systems that are becoming vital to ensuring quality of care and efficient day-to-day operations. More than 90% of organisations will be procuring either digital care planning, e-rostering, or e-mar over the next 12 months, reflecting the increasing maturity of these software categories and the growing number of available options in Social Care.

✦ Evaluating and implementing new technology

What are the three most important factors when evaluating any new technology or system?

OVERALL	● MIDDLE MANAGEMENT	● SENIOR MANAGEMENT	● BOARD LEVEL
1. T1 Ease of use	1. Quality of data & analytics	1. Ease of use	1. Price
2. T1 Reliability	2. Price	2. Reliability	2. Expertise in Social Care
3. Price	3. Ease of use	3. Integrations	3. Customer support

When it comes to choosing a supplier, the cost is important, but it's not everything. Respondents expressed a strong preference for technologies that are reliable and easy to use, with price being the third most influential factor in the decision-making process.

Curiously, suppliers' experience in Social Care was much more important to board-level professionals. A possible reason is the prevalence of owner-operators in the sector, as they, in particular, may feel more comfortable trusting a company that fully understands their specific needs.

The results also suggest that middle and senior management should focus on communicating not just the benefits of their preferred solution but also the potential risks of cheaper options when presenting options to the board. Any business case should include a comprehensive return on investment analysis.

Providers' top five challenges when procuring technology

1. Budgets
2. Lack of technical expertise
3. Compatibility/integration with existing systems
4. Minimising disruption to the day-to-day
5. Finding solutions that meet the specific needs of the organisation

The preference for simple, dependable solutions ties in with many of the most common pain points care professionals experience when buying and implementing technology. Lack of digital expertise, interoperability of multiple systems, and maintaining 'business as usual' are all top concerns.

In other words, providers are looking for solutions and suppliers that can fit around the way they do things as much as possible.

How many people typically get involved at each of the following stages when your organisation is buying new technology / IT?

	ORGANISATIONS WITH 100 OR FEWER EMPLOYEES		ORGANISATIONS WITH MORE THAN 100 EMPLOYEES	
	Less than ten people involved	Ten or more people involved	Less than ten people involved	Ten or more people involved
SHORTLISTING SUPPLIERS	57%	43%	52%	48%
SPEAKING TO SUPPLIERS	47%	53%	72%	28%
EVALUATING PRODUCTS	47%	53%	52%	48%
CHOOSING A PREFERRED SUPPLIER	53%	47%	66%	34%
APPROVING THE PURCHASE	48%	52%	73%	27%
AVERAGE	51%	49%	63%	37%

Decision by committee is surprisingly common in Social Care. 25% of respondents said 20 or more people are involved in approving a technology purchase! 45% of the time, at least 10 people were involved at that stage of the process.

That appears to be particularly common amongst smaller providers. Perhaps the ultimate decision maker(s) feel more comfortable seeking reassurance, even consensus, from the wider group before proceeding - particularly if they're buying something for the first time. Larger providers are more likely to seek input from more internal stakeholders at the shortlisting and evaluation stages, but involve fewer colleagues in the final stages.

Given that 35% of respondents said that complex procurement processes were a significant challenge when buying new technology, it begs the question of whether providers should consider limiting the number of essential personnel involved in the final evaluation and purchase. Especially with the majority of providers under real pressure to digitise quickly.

However, this trend can be seen as a real positive from a different angle. Many of the most common systems providers will be buying and implementing are used by large numbers of people - from whole departments to organisation-wide.

Given the time and cost associated with rolling out technology at this scale, thorough evaluation and testing from the broadest possible group of end users can be an effective due diligence process. Ultimately, though, the number of people involved matters less than whether there's a solid evaluation process in place with established timelines.

Government support for innovation

Have you accessed the government's Digitising Social Care fund?*

	ORGANISATIONS WITH 100 OR FEWER EMPLOYEES	ORGANISATIONS WITH MORE THAN 100 EMPLOYEES	OVERALL
ALREADY ACCESSED THE FUND	22%	32%	**25%**
PLAN TO ACCESS THE FUND: *(WITHIN THE NEXT 6 MONTHS)*	52% *(27%)*	49% *(29%)*	**52%** *(28%)*
HAVE NO PLANS TO ACCESS THE FUND	26%	20%	**23%**

Coinciding with the fast-approaching deadline for implementing digital care records, more than half of providers have tapped into the public funding available for this, or expect to do so in the next six months.

While very welcome, the £25m pot of cash available is for a very specific set of needs and can only go so far. There was general consensus that there is more that government can do to help Social Care organisations on their digital transformation journeys:

1. Improve access to training and support for Social Care providers	**38%**
2. Initiatives to improve UK workers' digital skills	**36%**
3. Investment in better digital infrastructure	**35%**
4. National approved technology suppliers list for UK Social Care	**33%**
5. A new national digital strategy for Social Care	**32%**

According to our survey, there is a lot of demand for support to improve digital skills and training at both the organisational and the individual level. This doesn't just affect Social Care employers - since 2015, the number of young people taking IT subjects at GCSE has fallen by 40%. And just 48% of UK employers believe young people are leaving full-time education with sufficient advanced digital skills*.

Finally, it's tough to implement and embrace game-changing technologies without reliable connectivity. More than a third of respondents want the government to prioritise better digital infrastructure - from faster broadband connections to more reliable mobile networks and more widespread access to 5G mobile internet.

10 practical strategies for delivering successful digital transformation projects

1. Know what support is available to you.

From dedicated funding to specialist toolkits - there is plenty of support out there (much of it free) that can make the process less painstaking - and possibly cheaper. Digital Social Care (digitalsocialcare.co.uk) has an extensive resource library, including its Data Security and Protection Toolkit.

2. Think BOB (Best of Breed).

Every provider operates differently, which may make all-in-one systems less suitable for your entire range of needs. Modern software development means it's much more practical and viable to choose the best possible piece of technology for the specific problem you're trying to solve rather than compromise and patch one with what you already have.

3. Integrate wherever possible.

Following point 2, when evaluating new technologies, ask the supplier whether they already integrate with your other critical systems or would be willing to. This will maximise the value you get from each piece of software, give you the best data quality, and make rollout quicker and easier. The ecosystem of integrated technologies serving the Social Care sector is developing rapidly to make this happen.

4. Get your end users involved early in the buying process.

When selecting new technology, involve some of the staff who will use it regularly in the evaluation process. They often spot practical issues and ask questions that others in the buying team had not considered. This will help to ensure that the technology you select meets their needs and is well-received by staff.

5. Start small.

When you've just bought a fantastic new bit of tech and are excited about what it can do, it can be tempting to rush to put it in everyone's hands. However, it's often better to start with a smaller pilot rollout to test it out. Choose a select group of champions to be your early adopters and give you feedback. This will help you identify issues or areas of improvement with either the technology or the implementation plan before a wider rollout.

6. Insist on an implementation plan.

Develop a clear plan for implementing the new technology, including timelines, roles and responsibilities, and contingency plans. That plan should also include a thorough internal communication strategy so everyone knows how the technology will benefit them and what to expect during the rollout. Your supplier should be supporting you with implementation, so be sure to lean on their knowledge and experience.

7. Train, train, and train some more.

Comprehensive training will help staff to feel more comfortable with the technology and ensure that they are using it effectively. But don't just think short-term. You should aim to get at least a few colleagues trained up to be product experts who can run regular refresher training sessions and help new joiners get up to speed quickly.

8. Address data privacy and security concerns upfront.

Care providers hold a lot of confidential, sensitive information about staff as well as the people they care for. Data privacy and security concerns can often be an obstacle to the adoption and implementation of new tech. It's best to get ahead of these concerns by implementing strong security measures and protocols, and by being transparent about how data will be used and protected.

9. Put continuous improvement processes in place for every system.

Encourage staff to provide feedback on the new technology and to suggest improvements. This can be done through regular surveys or feedback sessions. Often these can be carried out in collaboration with your supplier(s). This feedback should be used to make continuous improvements to the technology and the implementation process.

10. Embrace analytics.

Make sure you're receiving and reviewing data and analytics about how your systems are being used regularly. This will help you measure the effectiveness of the new technology and identify areas for improvement or further training.

About Sona

✦ Leading the digital revolution in Social Care

Frontline industries - including Social Care - have been underserved by technology for decades. And much of what's currently available wasn't designed with them in mind. This often results in operational inefficiency, higher costs, and lots of frustration for staff and managers.

Sona's mission is to change all that with our Frontline Operating System purpose-built for today's Social Care workforces.

Sona combines the functionality you expect from any workforce management software - including scheduling, time & attendance, and absence management - with dedicated features to empower staff and solve the unique challenges in frontline work. All in one easy-to-use platform.

That's why we have the trust of some of the world's most progressive frontline employers and the backing of world-class investors, including Google's Gradient Ventures.

ADVINIA Health Care   COLTEN CARE   creative SUPPORT   Praxis Care   Majesticare Luxury Care Homes

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