



| Report 2 October 2021

Australian Healthcare Index

Sharing people's perspectives and
experiences with healthcare in Australia

www.australianhealthcareindex.com.au



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Opening

Message from Dr. Marcus Tan

As we work to help people navigate the complex world of healthcare, we also want to ensure their voices are heard and experiences are shared. This led to the development of the Australian Healthcare Index with the Australian Patients Association (APA). With the release of the second report, we hope to continue elevating the perspectives of people from across Australia on their interactions and experiences with our healthcare ecosystem, and healthcare providers.

Australians identified their top concerns for Australian healthcare, shared their experiences across the public and private healthcare systems, provided insights on COVID-19 vaccination effort and the effects of the pandemic. The report offers learnings to the healthcare community and opportunities for those across the health sector to help support and strengthen the patient experience.

We all have a part to play in the future of Australia's healthcare and hope the report serves as a catalyst for conversation to explore the opportunities ahead or affirms where more work or change is needed. If you'd like to discuss anything in the report, I'd welcome hearing from you.



Dr Marcus Tan

HealthEngine CEO, Co-founder & Medical Director

Message from Stephen Mason

The Australian Patients Association (APA) is dedicated to championing and protecting the rights and interests of patients, improving the patient experience and their health outcomes. Ensuring the patient's voice is heard is key and the Australian Healthcare Index is one way we're helping bring their experiences and perspectives to the forefront with Healthengine, Australia's largest consumer healthcare platform.

With the report, we can share patients' collective views and messages with the broader community and especially those managing our healthcare system. Through our work in patient advocacy, we also work with organisations across the health ecosystem, and I have no doubt there will be points of discussion driven by findings in the Australian Healthcare Index.

From delays in elective surgery to continued cost concerns with private health insurance to the impact the pandemic plays on mental health, there are learnings to take and changes to make as we look to advocate for patients, share knowledge and provide support to all current and future patients in Australia. We look forward to the conversations and opportunities ahead.



Stephen Mason

Australian Patients Association CEO

Population

4,001

Survey participants

Age breakdowns

18-34 years old	30%	1219
35-49 years old	24%	930
50-64 years old	29%	1181
65+ years old	17%	671

Participation by state

NSW	32%	1242
QLD	20%	783
VIC	26%	1010
SA	7%	305
WA	10%	457
ACT, NT & TAS	5%	204

Gender

51% Female 49% Male

About this Report

The Australian Healthcare Index provides a pulse check on healthcare in Australia based on people’s perspectives and experiences. Produced by Healthengine and the Australian Patients Association, this is the second report. Adults across the country provided personal points of view and experience across the public and private healthcare ecosystem with primary care, private health insurance (PHI), emergency departments, elective surgery, prescription medicine and timely COVID-related insights.

Research and dashboard

During July 2021, we surveyed adults in Australia with Metrix Consulting as the data collection provider through an online survey. The final sample was 4,001 that was weighted to be nationally representative. The survey was promoted by Healthengine and the Australian Patients Association through emails, newsletters and social media. The report’s associated dashboard is available here with background on the research and ability to search data by demographics.

About the report’s use of the Net Promoter Score and how it’s determined

To measure satisfaction and if patients would refer their GP, Dentist, and/or Private Health Insurance (PHI), the survey identified the Net Promoter Score® (NPS) for each.

About NPS: Net Promoter Score®, or NPS®, developed by Bain Company, is a customer satisfaction benchmark that measures customer engagement and advocacy.

Net Promoter Score is determined by asking, “On a scale of 0-10, how likely are you to recommend a business (for example) to a friend or colleague.” The responses cluster in three groups: Promoters (score 9-10), Passives (score 7 or 8) and Detractors (score 0-6). The score is calculated by disregarding the Passive responses, and then subtracting the percentage of Detractor responses from the percentage of Promoter responses. Scores can range from -100 to 100.

It’s been noted that as a general rule in Australia and New Zealand, you should aim for an average NPS of 30.

NPS scoring breakdowns

70-100	Excellent
30-69	Great
0-29	Good
-100 to -1	Needs improvement

Source [here](#)

Disclaimer Inherent Limitations

This report has been prepared as outlined in the section titled “About this Report”. The findings in this report are based on data provided by patients who have received care in the Australian healthcare ecosystem. Any projection to the wider healthcare community and patient experience is subject to the level of bias in the method of sample selection.

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by, the patients consulted as part of the process.

HealthEngine is under no obligation in any circumstance to update this report, in either oral or written form, for events occurring after the report has been issued in final form. The findings in this report have been formed on the above basis.

Third Party Reliance

This report is solely for the purposes set out in the section titled “About this Report” and is not to be used for any other purpose. Neither HealthEngine nor the Australian Patients Association undertakes responsibility arising in any way from reliance placed by a third party on this report. Any reliance placed is that party’s sole responsibility.

Survey participants had an option to enter a draw for one of two \$500 JB Hi-Fi giftcards which were purchased by Healthengine and awarded on 17/8/2021.

Key Findings

1

Australia Healthcare Rates 7.6

Australians rated their healthcare a 7.6/10 average, with top reasons including good access and availability, good private hospital experience and good quality healthcare.

2

Top 3 issues for Australian healthcare

Private health insurance costs, the COVID-19 vaccination program and Emergency Department wait times topped the list of concerns for Australia.

3

Jabs for juniors

57% of Australians are in favour of COVID-19 vaccinations for kids. Only 12% are against and 31% said they didn't know.

4

COVID-19's effect on mental health

66% of those feeling a decline in mental health since the pandemic blame COVID-19.

5

Elective surgery lag times

44% of people needing elective surgery have been waiting 90+ days, including 30% of people needing a Category 1 surgery and 55% needing a Category 2 surgery.

6

PHI's kudos for coverage but cons for cost

While some people feel positively towards PHI for their hospital and extras coverage, others continue to question the value for money and cost.

Learnings and Insights



Healthcare Experiences

Pages 7 to 14



Perspectives on Personal Healthcare

Pages 16 to 19



Healthcare Experiences

Australia's Healthcare Rating

On a scale of 1-10, how would you rate your personal satisfaction with healthcare in Australia?

Average National Score

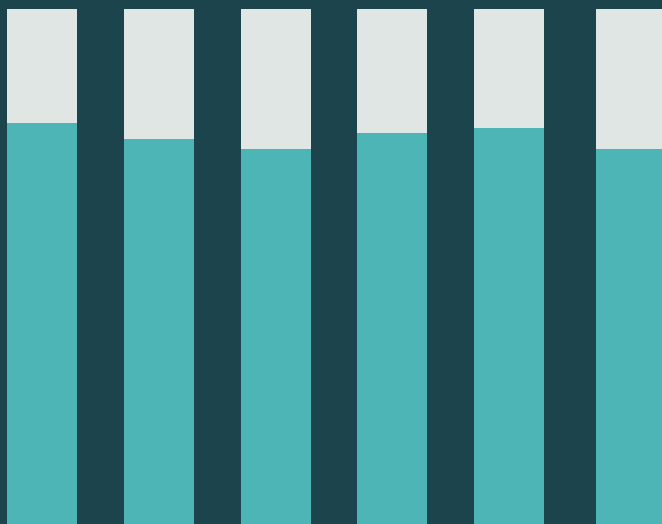
7.6/10

7.7/10 Male 7.5/10 Female

7.8/10 Age 65+ rated highest

Average State Score

NSW 7.8 QLD 7.5 SA 7.3 VIC 7.6 WA 7.7 ACT/NT/TAS 7.3



Australia's healthcare rating

As the pandemic continues, people's satisfaction with healthcare earned a 7.6/10 rating, just a bit down from the March 2021 Australian Healthcare Index report where it landed at 7.8/10. The July survey delved into what was behind people's ratings.

The top 3 reasons

People rating 8-10

- 1 Good access & availability to healthcare and services
- 2 Good private hospital experience
- 3 Good quality healthcare

People rating 1-3

- 1 Poor private hospital experience
- 2 Healthcare is too expensive
- 3 Poor Public Hospital experience

Top issues facing Australian healthcare

People selected up to 3 issues they saw as a challenge for Australian healthcare. Here are the top areas identified:

55%

Private Health Insurance Costs

49%

COVID-19 vaccination program

42%

Emergency Department waiting room times

35%

Access to mental healthcare

31%

Access to elective surgery/waitlists

22%

Ambulance Ramping

18%

Obesity

14%

Access to Allied Health

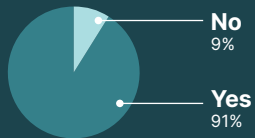
9%

Other/none of above

Patients review

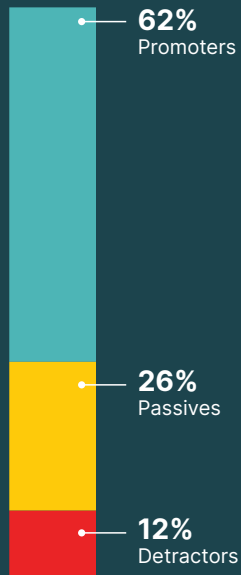
General Practitioners

Do you have a regular GP/clinic?



On a scale of 1-10, how likely are you to recommend your regular GP to a friend or colleague?

50 Net Promoter Score



Top reasons for Promoters

- ★ Good quality of care
- 🕒 Convenient easy to book appointments (i.e. phone, online, email)
- 💬 Staff are helpful

Top reasons for Detractors

- 🗣️ Poor advice/misdiagnosis
- 🏥 Poor quality of care
- 💬 Lack of or poor communication from staff

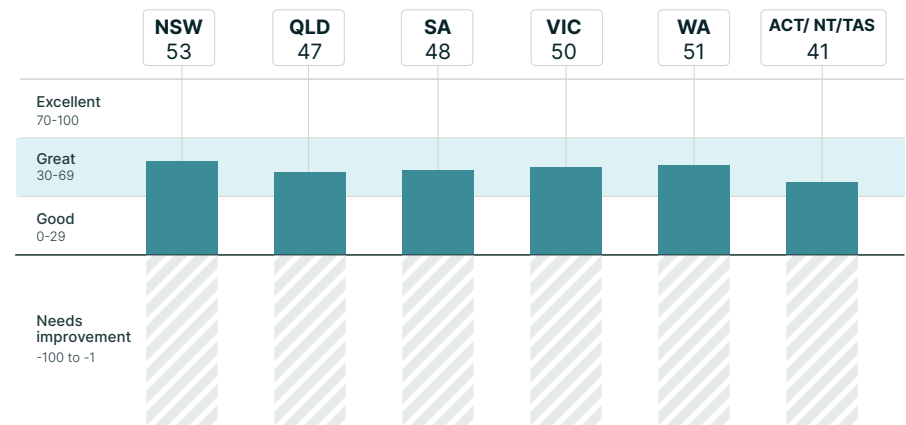
91% have regular GP or clinic & age 65+ are most likely to recommend

Good quality of care, convenient ways to book appointments and helpful staff were top three reasons promoters rated their GPs highly. Bulk billing offered, helpful staff and great communication from staff rounded out top reasons.

For detractors, poor advice or misdiagnosis, poor quality of care and lack of or poor communication from staff were the top three reasons as to why they wouldn't recommend their GP or clinic. Poor availability of booking times, difficulty in booking appointments, unhelpful staff and long waiting room times were other reasons selected.

Looking at ages, 65+ year olds were most likely to recommend their GP, noted by a 62 NPS while 18-34 year olds still provided a strong intent to recommend but notably lower at 41 NPS.

NPS[®] by state



Patients review

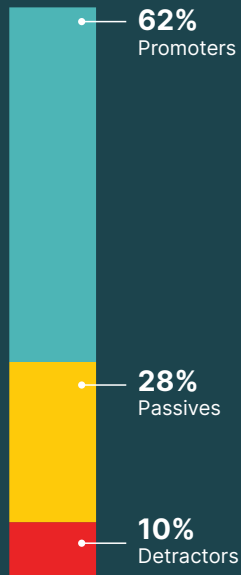
Dentists

Do you have a regular Dentist/clinic?



On a scale of 1-10, how likely are you to recommend your regular GP to a friend or colleague?

52 Net Promoter Score



Top reasons for Promoters

- Good quality of care
- Staff are helpful
- Great communication from staff
- Reasonable waiting room times

Top reasons for Detractors

- Lack of or poor communication from staff
- Poor availability of booking times
- Poor care or misdiagnosis
- Difficult to book appointments

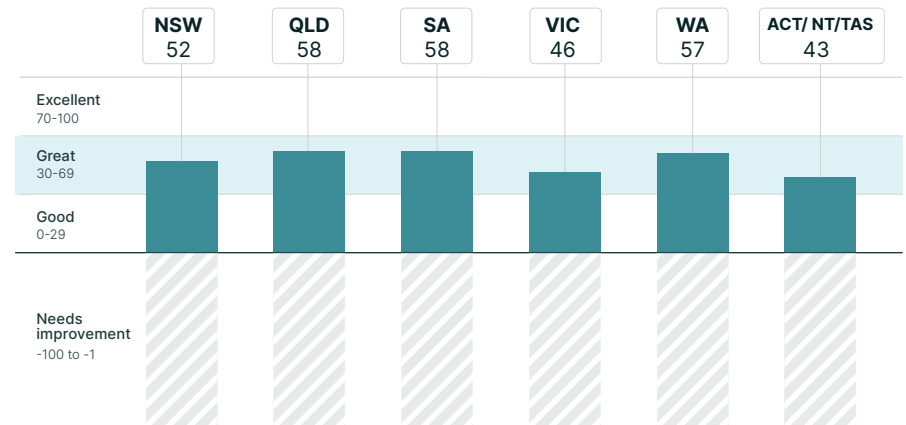
Only 56% have a regular Dentist or clinic & age 50+ most likely to recommend

Good quality of care, helpful staff, great communication from staff and reasonable waiting room times were top reasons why promoters rated their dentists highly.

For detractors, lack of or poor communication from staff, poor availability of booking times, poor care or misdiagnosis and difficulty in booking an appointment were top reasons why they wouldn't recommend their Dentist or clinic.

Looking at ages, people 50-64 and 65+ were most likely to recommend their dentist, noted by 59 and 55 NPS. This group is also most likely to have a regular dentist at 65% and 69% respectively whereas only 42% of 18-34 year olds do. The numbers recognise the continued opportunity to get more people into a regular dental practice for care.

NPS[®] by state



Patients use and review

Emergency Department

Have you been in an emergency department in the past 6 months?

24% Visited an emergency department
313 visits

How satisfied were you with the emergency department experience?

Public hospital

92%
895 visits

67%
Satisfied

27%
Disatisfied

6%
Neither

Private hospital

8%
76 visits

79%
Satisfied

18%
Disatisfied

3%
Neither

Emergency departments were visited by 24% of respondents over the past six months, with 92% public visits vs 8% private visit

Satisfaction ratings for EDs were 67% for public vs. 79% for private and dissatisfaction ratings were 27% for public vs 18% for private. Helpful staff, good quality of care, good communication from staff and quality medical advice were top reasons cited by people in the satisfied category when asked about their public ED experience. Those with a private ED experience chose conditions of the ED were good, helpful staff, good quality of care and efficient admittance process as top reasons for their satisfaction.

For dissatisfied ED visitors, long wait times were noted by 70% of them, while inadequate staffing levels, lack of or poor communications from staff and poor advice or misdiagnosis rounded out other top reasons for low satisfaction.



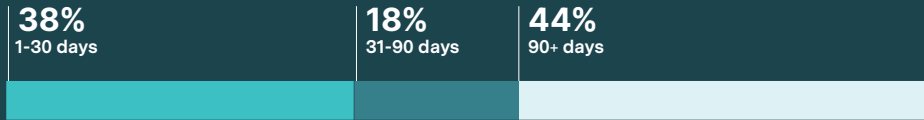
The wait, surgery and patients review

Elective Surgery

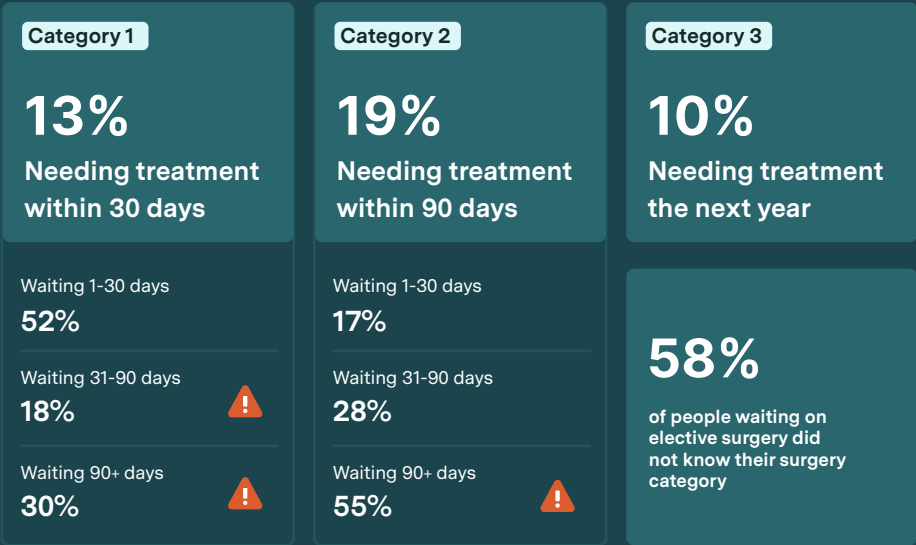
> People waiting for elective surgery



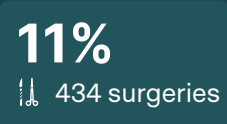
> Wait times



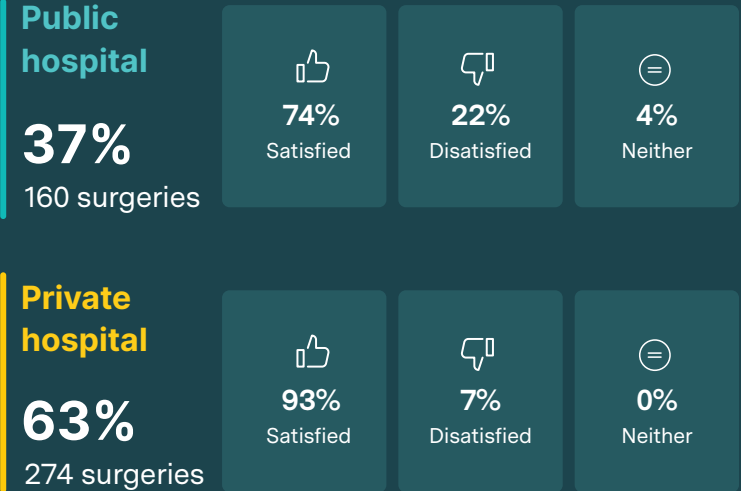
> Surgery categories and breakdowns of wait times



> People who have had elective surgery in the past 6 months



> How satisfied were you with the elective surgery experience?





Overview on elective surgery experience

At the time of the survey, 8% of people were waiting to have elective surgery with a majority of those planned for public hospitals. Looking at length of wait times nationally, 38% were 1 to 30 days, 18% were 31 to 90 days and 44% were more than 90 days. In terms of the category of elective surgeries, 42% of people identified theirs as 1, 2 or 3. In addition, 58% of people waiting for elective surgery, didn't know the category or urgency of their surgery.

Further analysis determined that for people facing Category 1 surgery, 18% said they've been waiting 31-90 days and 30% said they've been waiting more than 90 days for a surgery that should be done within 30 days. For category 2, 55% said they've been waiting more than 90 days for a surgery that should happen within 90 days. **These examples reflect the current stress on the public and private hospital systems, implications of the pandemic and additional risks to people's health with the delays.**



Over the past six months,

11% of respondents had an elective surgery, and those were split between 63% in private hospitals and 37% public hospitals.

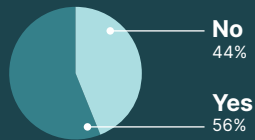
For those satisfied with the experience across public and private, top reasons were great quality of care during and after, efficient admittance process and helpful staff.

For those dissatisfied with the experience in public hospitals, top reasons were poor quality of care during and after surgery, wait time for surgery was too long and lack of or poor communications from staff. Due to the low number of those dissatisfied with private experience, top reasons were not identified.

Patients review

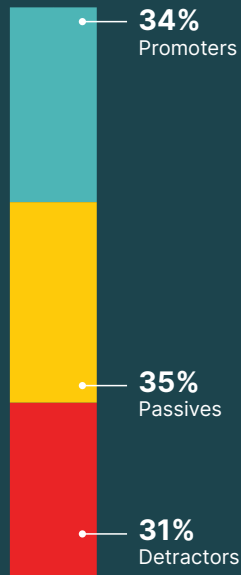
Private Health Insurance (PHI)

> Do you have private health insurance?



> On a scale of 1-10, how likely are you to recommend your regular Private Health Insurance to a friend or colleague?

2 Net Promoter Score



Top reasons for Promoters

- ★ Good hospital coverage provided
- 🕒 Good extras coverage provided
- 💬 Good customer service experience

Top reasons for Detractors

- 🚫 Poor value for money
- 💰 Price of insurance is not affordable
- 🗨️ Poor extras coverage provided

Pro-PHI like the coverage while critics cite cost issues

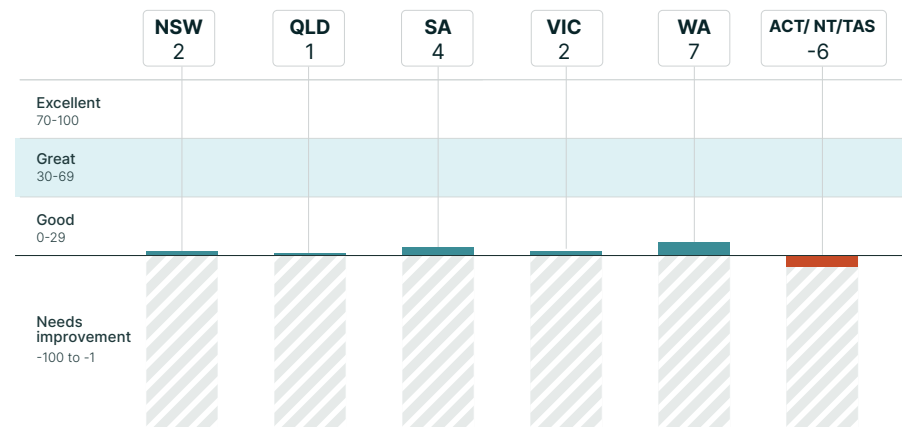
62% confirmed they have PHI, suggesting survey participants are/were more likely to have PHI than the national average of **54.3%** from the APRA 31 June 2021 quarterly report. Responses represent a national cross-section of funds.

Good hospital coverage, good extras coverage and good customer service were top three reasons promoters rated their PHI highly. Thirty-five percent of this group noted that their PHI was good compared to other PHI plans and 30% also chose their PHI as being a good value for the money.

For detractors, poor value for the money, price of insurance is not affordable and poor extras coverage provided were the top three reasons for not recommending their PHI. 70% of this group zeroed in on poor value for the money. PHI cost was the top healthcare issue facing Australia with 55% of people choosing this.

Looking at ages, the oldest and youngest age groups delivered the highest NPS scores with 65+ year olds more likely to recommend with an NPS of 20, followed by 18-34 year olds with an NPS of 6. Dissatisfied age groups include 35-49 year olds with an NPS of -7 NPS and 50-64 year olds with a -5 NPS.

NPS[®] by state





Perspectives on Personal Healthcare

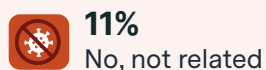
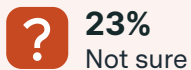
Pre-pandemic to now

Mental Health Comparison

Which of the following describes your current mental health compared to the start of the COVID-19 pandemic in early 2020?



Do you believe the decline of your mental health is due to the COVID-19 pandemic?



Perspective on mental health during the pandemic

As the pandemic continues, it is well noted that there are increasing mental health challenges for people in Australia. The Australian Healthcare Index found that 30% of people say their mental health has declined since the start of the pandemic and 66% attribute this to COVID-19.

Only 11% say it's not related to COVID-19. Not surprisingly VIC and NSW had the highest percentage of people citing a decline in mental health and attributing it to COVID-19, 76% and 68% respectively. The 18-34 year old age group was more likely to say that their mental health was worse in the ongoing pandemic compared to other age groups.



As covered earlier in the report,

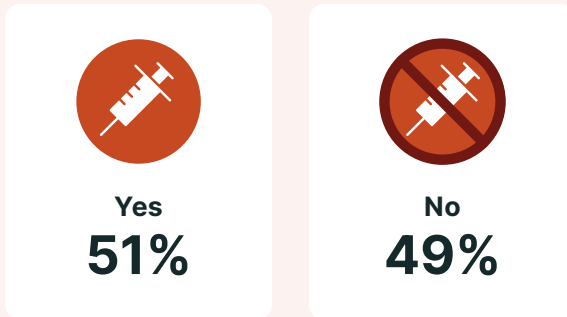
Access to mental health care was identified as a top issue facing Australian healthcare, with 42% choosing it as one of their top three concerns.



COVID-19 Vaccination





Views on the Vax

> Have you received a COVID-19 Vaccine?








> For people who hadn't received a jab yet, the survey asked, which of the following best describes why you have not had the vaccine?

Multiple answers ✓

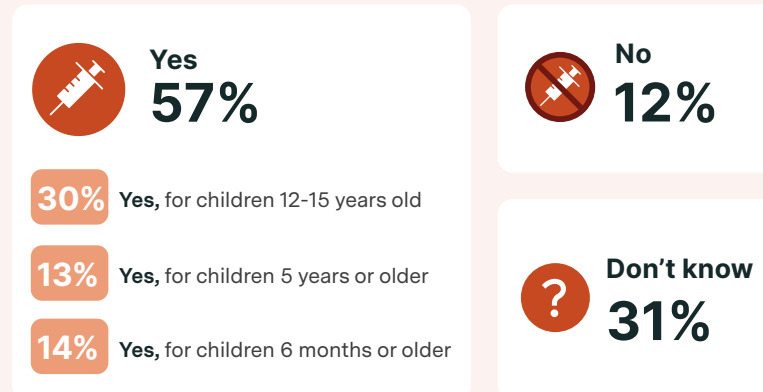
-  I don't want to be vaccinated **7%**
-  I haven't decided if I want it or not **17%**
-  I'm waiting for different vaccines to be available **34%**
-  None of the above (i.e. eligibility) **42%**

> Those who don't want to be vaccinated were asked why?

Multiple answers ✓

-  I don't think it's safe **76%**
-  I am afraid of the side effects **47%**
-  I am healthy so don't feel need for it **21%**
-  I don't believe in vaccinations **17%**
-  I don't travel so I don't feel it's necessary **11%**

> Are you in favour of children having the COVID-19 vaccine?





People's take on the COVID-19 vaccine

Overall, when it comes to vaccinating kids against COVID-19, 57% are in favour of it, while 43% say no or are unsure. Thirty percent are inline with current plans underway to vaccinate 12-15 year olds. While no COVID-19 vaccine has been approved for kids under 12, thinking ahead to the future, 13% are in favour of vaccinating kids 5 years or older and 14% are in favour of vaccinating kids 6 months and over, similar to the flu vaccine. With the quick changing world of COVID-19 and ongoing research, more kids may need to get vaccinated and Australians seem supportive based on the survey findings.

For the adult population, the vaccination effort is well recorded across the states and participants in the survey appear to be early adopters, as of July 51% had received a COVID-19 vaccination. **For those holding back, 7% said they didn't want to be vaccinated, 34% were waiting for a different vaccine and 17% were undecided.**

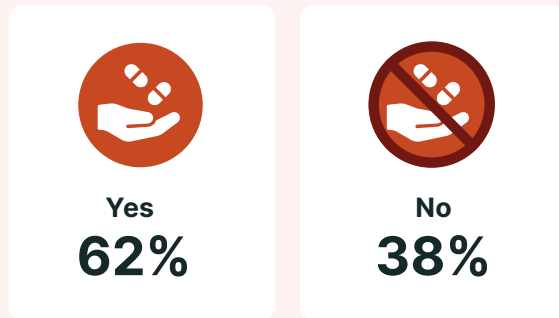
The arrival of Moderna/Spikevax to pharmacies may push these latter two groups along. At the time of the survey in July, eligibility requirements prevented younger age groups from getting vaccinated which helps account for 42% who selected none of the above as a reason for not getting the vaccination yet.

For those who don't want to be vaccinated, top reasons were they don't think the COVID-19 vaccine is safe (76%) and they were afraid of the side effects (47%).

Patients review







People's take on Prescription Medicine

Are you currently taking prescription medication?



How do you feel about the cost of prescription medication?

Multiple answers ✓

-  It's affordable **37%**
-  Pharmaceutical Benefits Scheme (PBS) makes it affordable **35%**
-  Concession card makes it affordable **28%**
-  Cost is outside my regular budget, but I make room for it when needed **19%**
-  I can't afford to get the prescriptions I need **5%**
-  Other/None of above **5%**

The Cost of prescription medication

Nationally 62% of adults are taking prescription medication and most believe it's affordable, especially with the Pharmaceutical Benefits Scheme (PBS) and Concession cards, including the Health Care Card, DVA card, Pensioner card, Closing the Gap and Safety Net Card.

Only 5% of people said they can't afford to regularly get the prescriptions they need, and 19% said the cost for prescriptions was outside their regular budget but they can make room for it when needed.

When asked about their personal situation and if prescription medication was affordable to them, 72% agreed that prescription medication was affordable for them personally and 19% disagreed.



Closing

We want to thank the people across Australia who took the time to participate in the Australian Healthcare Index survey and contribute their thoughts and experiences. Along with the Australian Patients Association (APA), we hope the latest report provided a helpful pulse check on how people are feeling about their health as well as the nation's, how they're connecting with the healthcare system, healthcare providers and more.

The Australian Healthcare Index covers a broad range of topics across the public and private healthcare systems, and we hope that it inspires more exploration, conversation and opportunities to focus on the world of patient-centred care and how we work together to have one of the greatest healthcare systems in the world.

If we and/or the APA can support your organisation or talk further about these results, please get in touch. Or if there's a topic you think we should explore for the next Australian Healthcare Index, let us know. We look forward to future connections and continuing to provide a platform to share people's experiences with healthcare as we look to strengthen the patient experience and access to the care they need.

Dr Marcus Tan

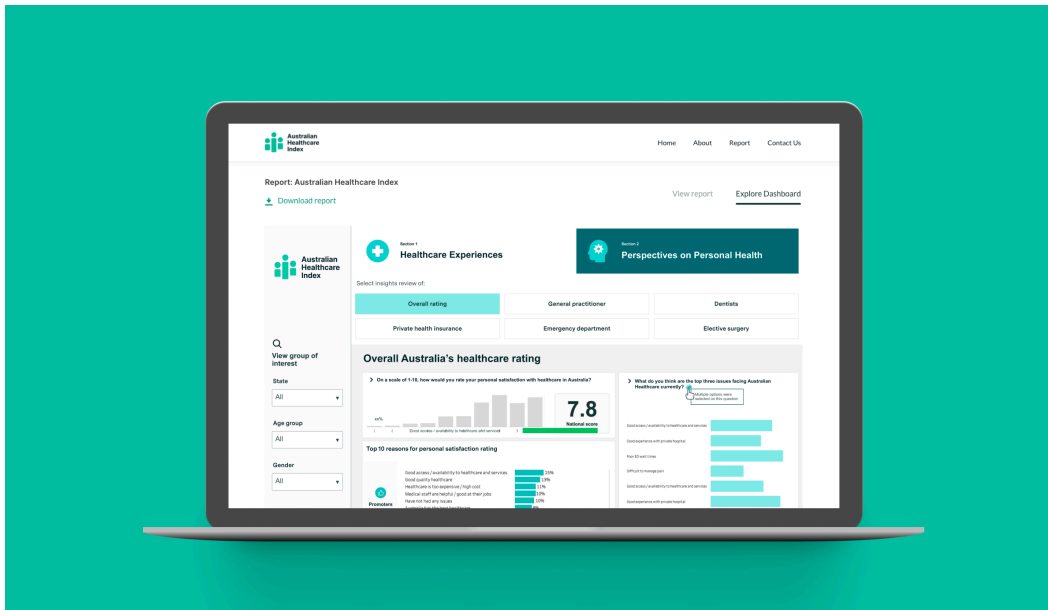
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Survey and dashboard access

Supporting background



Survey questions and a breakdown of the responses covered in this report are available for review on an [interactive dashboard](https://www.australianhealthcareindex.com.au). Additional demographic breakdowns are available across states, age and gender.

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About

Healthengine and the Australian Patients Association



Healthengine is Australia's largest consumer healthcare platform developed to help people navigate the complex world of healthcare. Healthengine is on a mission to transform humanity's health, one care experience at a time.

Founded in 2006, Healthengine now has more than 3.9m users connecting with over 7,400 Australian healthcare providers across the spectrum of GPs, dentists, allied health practitioners, medical specialists and pharmacies nationwide. To support the COVID-19 vaccination rollout, Healthengine developed its COVAX Solution online booking system and was chosen by the Department of Health to build the Commonwealth Booking Platform.

Over Healthengine's history, more than 10.4 million Australians have made more than 54 million bookings on the platform. To find the right care, connect with healthcare providers and manage healthcare, all in one place, visit healthengine.com.au or download the Healthengine App for Android or iOS. For healthcare providers, please visit practices.healthengine.com.au to learn more and join Australia's largest network of patients.



The Australian Patients Association (APA) is an independent not-for-profit organisation dedicated to championing and protecting the rights and interests of patients, improving the patient experience and their health outcomes. Our main roles are providing patient advocacy, information and support.

The APA's "Core Patient Values" define and drive our mission. The APA listens to and acts for Australian patients. It strives to be the definitive "first stop", "signpost" organisation to represent, inform and assist Australian patients. To that extent the APA develops strategic alliances with organisations involved in Australian healthcare for mutual interest and benefit.

Rather than replicating existing resources, the APA collates and refers patients to the leading, authoritative source in their area of patient need.

The APA primarily provides patient support services through its publications, help line and website, patients.org.au.