Australian Healthcare Index

Report 1
25th March 2021

Australian Healthcare Index

Sharing people's perspectives and experiences with healthcare in Australia

Australian Patients Association

HealthEngine

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Opening

Message from Stephen Mason

Stephen Mason
Australian Patients Association CEO

The Australian Patients Association (APA) is proud to launch the inaugural Australian Healthcare Index in conjunction with HealthEngine, Australia's largest consumer healthcare network.

The APA was established to hear the patients' voice and advocate on their behalf. This extensive survey has allowed us to hear the patients' voice and pass on their message and views to the broader community and in particular those responsible for managing our healthcare system.

This should result in better outcomes for patients in general.

I hope you gain as much out of this comprehensive and insightful report as we did. We look forward to the conversation ahead and continued opportunities to contribute to the patient experience across Australia's healthcare system.

Message from Dr. Marcus Tan

Dr Marcus Tan
HealthEngine CEO, Founder & Medical Director

Together with Australia's leading patient advocacy and education organisation, the Australia Patients Association (APA), we want to elevate people's perceptions of, and experiences with, healthcare across Australia. This work builds on HealthEngine's dedication to the ecosystem of patient-centred care through our strong network of GP, Dental, Specialist and Allied health professionals.

With the APA, we're pleased to release the first Australian Healthcare Index. This report provides a new way to identify, champion and share people's perspectives on healthcare, as well as provide a baseline of data and learnings that will be compared and shared twice a year.

The report offers learnings and insights to support the healthcare community and patient experience. We hope it is a catalyst for conversation and helps identify the opportunities ahead and change needed, during the COVID-19 pandemic and beyond, to support the future of healthcare in Australia.

Population

8,168

Survey participants

Age breakdowns

Age	%	Participants
18-24 years old	13.4%	1,095
25-34 years old	28.9%	2,362
35-49 years old	30.3%	2,473
50-64 years old	19.3%	1,577
65+ years old	8.1%	661

Participation by state

State	%
ACT	4%
NSW	19%
NT	1%
QLD	18%
SA	6%
TAS	1%
VIC	19%
WA	32%

Gender

69% Female

30% Male

1% Other/Prefer not to say

Women are known to be more conscious of personal and family health, so their greater interest in the survey was not surprising. Our findings review determined the responses from men and women were closely aligned and no significant gender skew was identified in the responses.

Survey respondants had an option to enter a draw for one of two $250 JB Hi-Fi cards which were purchased by HealthEngine and awarded on 5/01/2021

About this Report

The Australian Healthcare Index is a new report that provides a pulse check on healthcare in Australia from patients' perspectives and experiences. Produced by the Australian Patients Association and HealthEngine, this report will be released twice a year. More than 8000 adults across Australia participated in the supporting survey and provided personal points of view and experiences across the public and private healthcare ecosystem with primary care, private health insurance (PHI), emergency departments, elective surgery, prescription medicine and more.

Research and dashboard

During November 2020, we surveyed adults in Australia via an Alchemer online survey. 8,168 people completed the survey which was promoted on the HealthEngine booking platform and through social media, targeted emails and newsletter communications from HealthEngine and the Australian Patients Association. The report's associated dashboard is accessible here with background on the research and findings.

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 responsives 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

NPS Score	Category
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 incthis 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 andcrepresentations 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.

Key Findings

01.
Australian Healthcare Rates 7.8

People rate their satisfaction with Australian healthcare highly, based on the 7.8 out of 10 average. 65.5% of survey respondents rated Australian healthcare between 8 - 10. This baseline score will be measured and compared as Australia's Healthcare Index report continues twice a year.

02.
The GP & Dentist Divide

When it comes to recommendations of healthcare providers, GPs earned a Net Promoter Score of 49.3 while Dentists earned 1.1. While an NPS above 0 is considered 'good', open-ended responses showed people are avoiding the dentist, for reasons including cost and fear, and not prioritising it as a part of their overall care.

03.
Access to Healthcare

With an ongoing pandemic and minimal flu season, people weighed in on their healthcare visits. Only 6.4% of people had no visits to GPs or other healthcare providers in 6 months prior to taking the November survey whereas 48.6% had 4 or more healthcare-related appointments. Over a third (37.3%) of respondents said they had more healthcare appointments than usual.

04.
The Private Health Insurance (PHI) Puzzle

While 55.1% of respondents have PHI, the PHI providers earned a Net Promoter Score of -5.6, suggesting that while people are still buying coverage and extras, there's a perception that the cost may be outweighing the benefits.

05.
Prescriptions at a Cost

36.6% of people think that prescription medicine is too expensive, which could mean for some people that the cost of prioritising medicine and their healthcare puts financial pressure on their families.

06.
Tech Support for Health

Nearly *95% of people are interested in the intersection of tech and healthcare with use of or interest in telehealth, health apps, e-scripts and more.

*Survey responses should be viewed in the context that the majority of the respondents use online booking services which may suggest a propensity toward the use of technology.

Learnings and Insights

Patient Satisfaction with Personal Healthcare Experiences

This section explores people's perspective on overall healthcare in Australia as well as GPs, dentists, emergency departments, elective surgery and private healthcare insurance.

Pages 7-12

Patient Perspective on Personal Health-Related Topics

This section reviews a variety of topics tied to personal healthcare including prescription medicine cost, healthcare appointments, personal state of health, technology use and realities of social isolation.

Pages 13-17

Australia's Healthcare Rating

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

Average national score

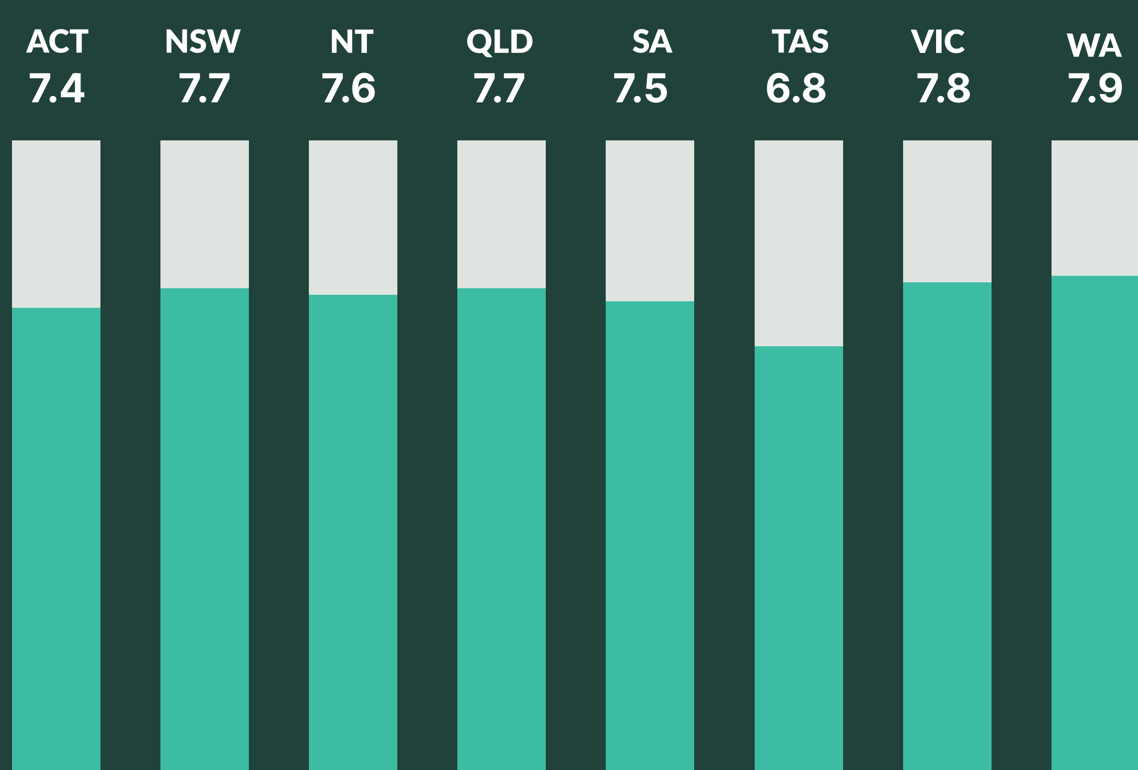
7.8/10

65.5% rated 8-10

7.9/10 Male

7.7/10 Female

Average score by state



Australia's Healthcare rating

Across Australia and within the states and territories, people consistently rated their personal satisfaction with AU healthcare as high. This establishes a baseline for future Australian Healthcare Index reports, providing a pulse check based on people's perspective and experiences. The plan is to measure and report on this twice a year.

Review of General Practitioners

On a scale of 0-10, how likely are you to recommend your regular GP to a friend or colleague?

49.3
Net Promoter Score℠

61.1% Promoters

27.1% Passives

11.8% Detractors

Primary Reasons for score

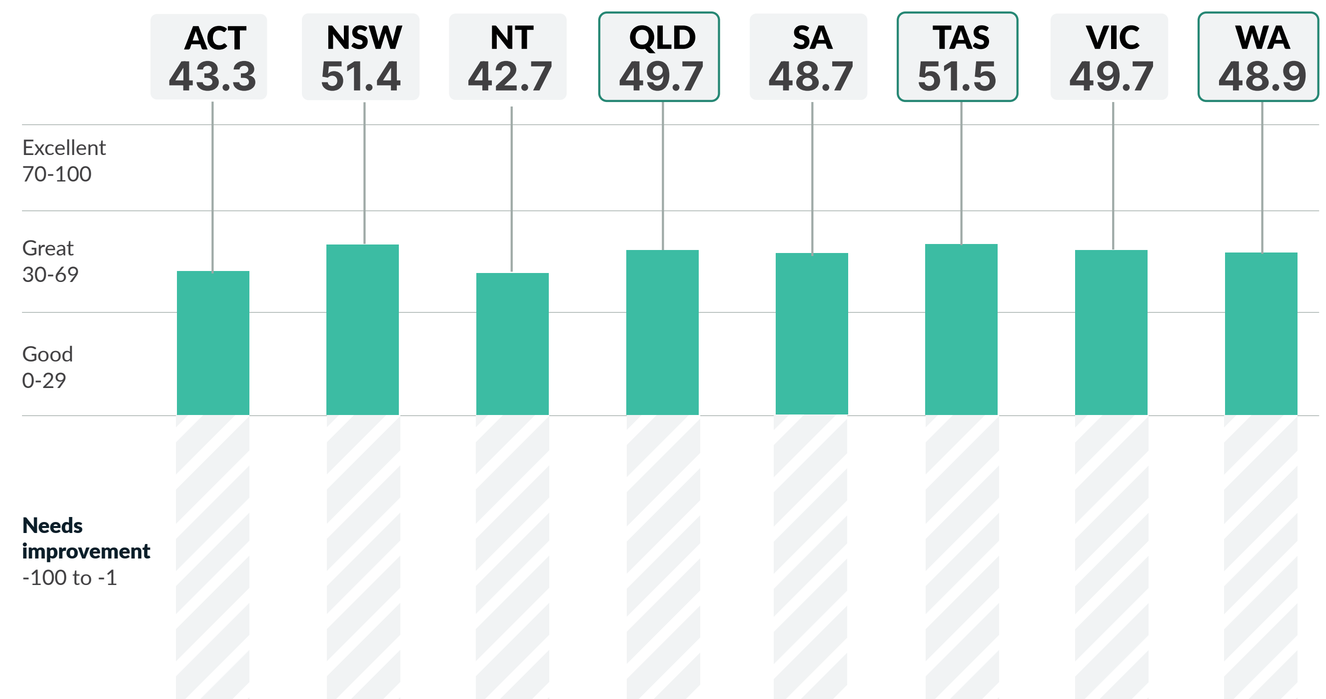
- Quality of care **63.3%**
- Access/availability of appointments **26.8%**
- Other **5.6%**
- Cost **4.3%**

GPs land positively with an NPS of 49.3

Quality of care was the primary reason driving the score for GPs, followed by access/availability of appointments and then cost. Quality of care was 1.7 times higher for promoters than detractors, which isn't surprising. Cost concerns were over 2 times higher for detractors and passives compared to promoters which is interesting considering there is access to bulk billed care. The report did not look at patients attending private vs bulk bill practices, but that is a future consideration.

Within the open-ended responses, a common theme that arose was the importance of the doctor's care style and personal approach.

NPS ® by state



Review of Dentists

On a scale of 0-10, how likely are you to recommend your regular Dentist to a friend or colleague?

1.1
Net Promoter Score℠

36.8% Promoters

27.5% Passives

35.7% Detractors

Primary Reasons for score

Quality of care **51.6%**

Cost **17.8%**

Access/availability of appointments **15%**

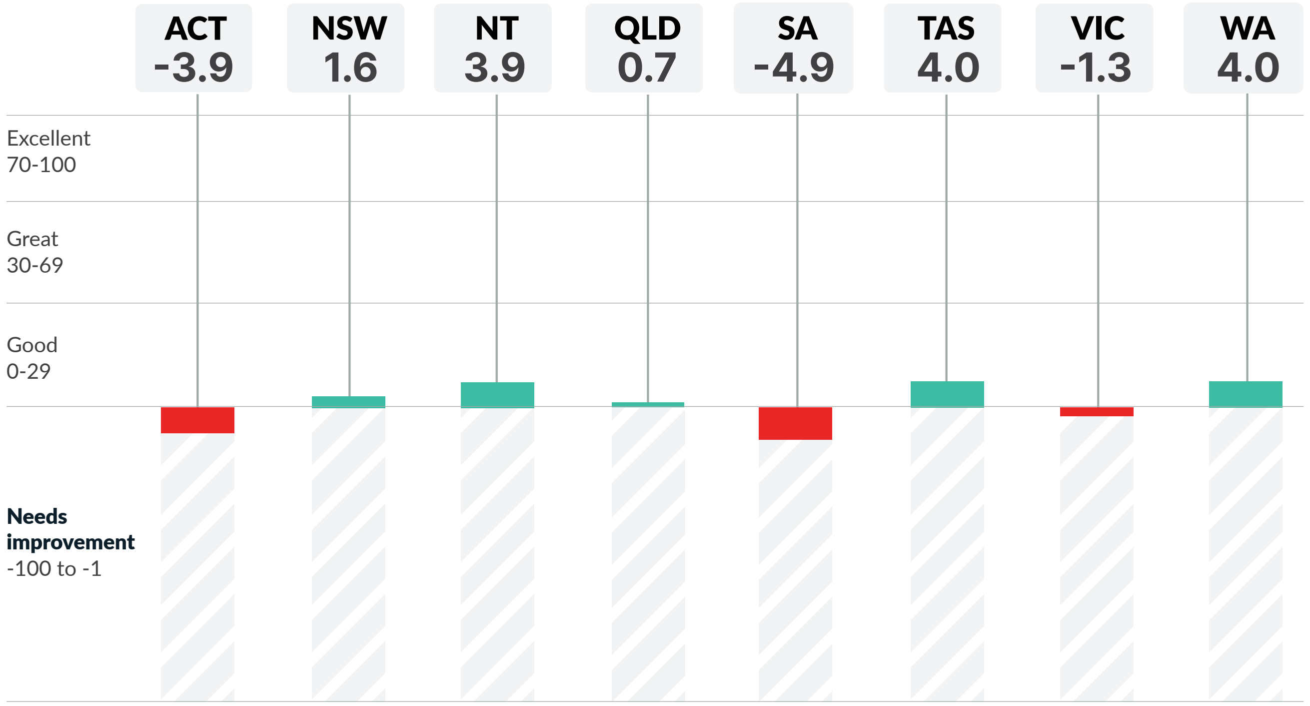
Other **15.7%**

More smiles needed for dental care.

Overall, quality of care and cost were the top two reasons driving people's scores on dentists. Promoters chose quality of care as their No. 1 reason while detractors chose cost as their No. 1 reason, raising affordability as a concern.

In addition, the open-ended responses indicate hesitation with the dental procedure itself and fear of being in the chair versus dissatisfaction with an individual dentist. Additional input revealed that 65.6% do not have a regular dentist and 23.2% don't prioritise or have dental care.

NPS ® by state



Emergency Department Use & Satisfaction

Have you been to an Emergency Department in the past 6 months?

25.6%
Visited an emergency department

How satisfied were you with the Emergency Department experience?

	Satisfied	Dissatisfied	Neither
Public 94.4% 1972 visits	69.2%	26.4%	4.4%
Private 5.6% 117 visits	85.5%	11.1%	3.4%

Stats on Emergency Department (ED) experience

25.6% of respondents needed to visit an emergency department with 94.4% public vs 5.6% private visits. The findings are based on 117 private ED visits vs 1972 public ED visits.

Private EDs earned higher satisfaction ratings with 85.5% vs 69.2% for public EDs. Top reasons overall for the ED rating were quality of care and timeframe to be seen.

Looking at dissatisfaction across private EDs with 11.1% and public EDs with 26.4%, the open ended responses provided some additional perspective. Three core reasons of concern contributing to dissatisfaction included: long wait time, misdiagnosis and poor communication within the ED environment.

Elective Surgery Need & Satisfaction

Have you needed to have elective surgery in the past 6 months?

Less than
10%
Needed Elective Surgery

How satisfied were you with the Elective Surgery experience?

	Satisfied	Dissatisfied	Neither
Public 46.2% 373 Surgeries	76.1%	18.5%	5.4%
Private 53.8% 434 Surgeries	87.3%	8.8%	3.9%

Stats on Elective Surgery Experience

Less than 10% of respondents needed to have an elective surgery and those were split between 53.8% in private hospitals and 46.2% in public hospitals. Queensland was the only state with more public hospital surgeries with 57.3% vs 42.7% private.

Reviewing elective surgery nationally, 87.3% of people at private hospitals were satisfied with their experience vs 76.1% in public hospitals. Primary reasons given for the ratings were quality of care and that surgery was scheduled in a timely manner. Based on open-ended responses, dissatisfaction could be tied to concerns about aftercare, cost and poor communication.

Looking at states with 125 surgeries or more, QLD had the highest elective surgery private hospital satisfaction levels at 88.1% and WA had the highest elective surgery public hospital satisfaction at 82.9%.

Review of Private Health Insurance

-5.6

Net Promoter Score℠

How likely are patients to recommend their private health insurance to someone?

29.8% Promoters

34.8% Passives

35.4% Detractors

Primary Reasons for score

- My hospital and extras coverage **30.8%**
- My coverage costs too much **28.2%**
- My coverage is affordable **25%**
- Customer Service **8.3%**
- Other **7.6%**

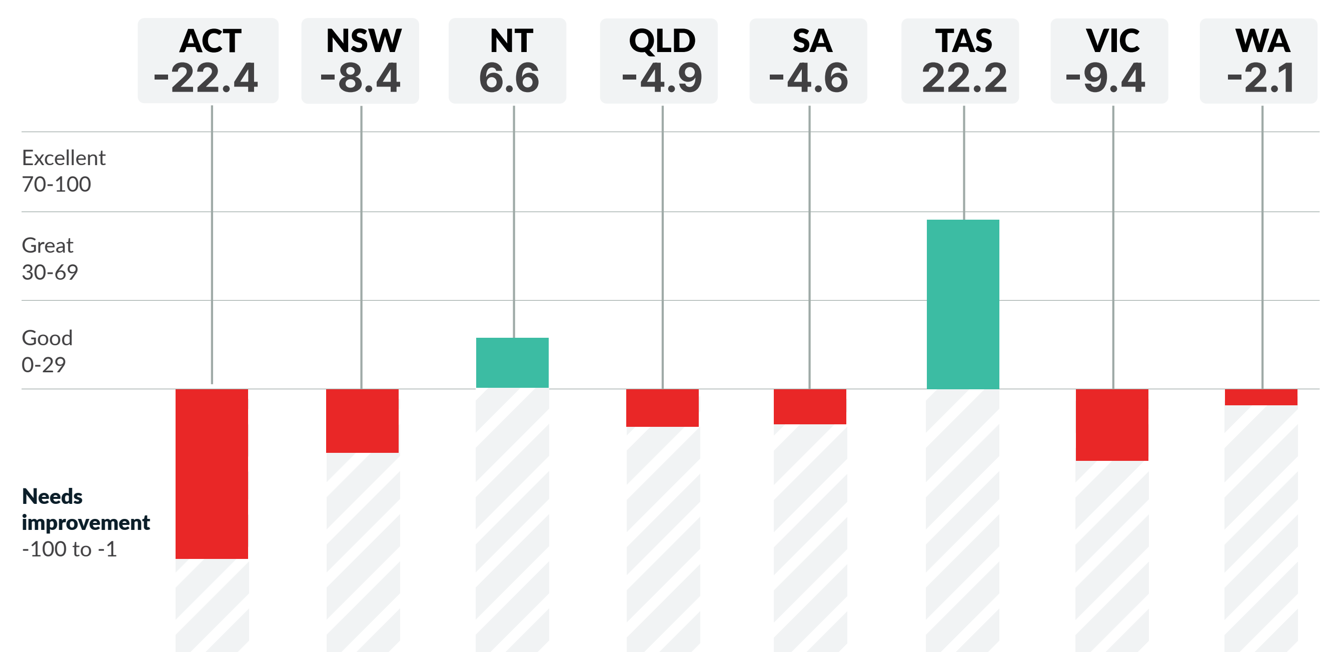
55.1% of survey respondents have PHI cover

This number is in line with AHPRA's report showing 53.2% of the population having general treatment membership, and responses represented a national cross-section of funds.

Overall, the top reasons influencing the rating were: hospital and extras coverage and coverage affordability. Based on the breakdowns of promoters, passives and detractors, "my coverage costs too much" was the no. 1 response (57%) by detractors, 28.5 times higher than promoters (2%). Promoters identified "my hospital and extras coverage" as the top reason for the score (50%) which was 3.8 times higher than detractors (13%).

At a state level, reasons given for the score were consistent with the overall national findings. Common themes that arose in the open-ended responses included that the policy was new and/or people hadn't made a claim yet (explains why some didn't recommend it) and there was a perception that all PHIs were similar.

NPS ® by state



People's Take on Prescription Medication

How do you feel about the cost of prescription medication?

- Prescription medication is affordable **56%**
- Prescription medication is too expensive **36.6%**
- Haven't purchased prescription medication before **3.5%**
- Other **3.9%**

The Cost of Prescription Medicine

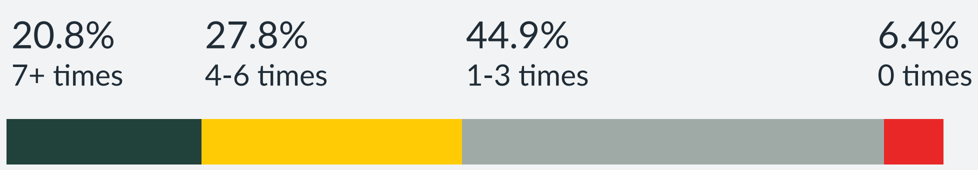
Nationally, 36.6% said that prescription medicine is too expensive while 56% said it is affordable. With over a third of people saying it's too expensive, this could mean that people aren't able to afford or prioritise the purchase of key medicine they need.

Across the states, the findings varied, but were inline with the national figures as more than one third of respondents said costs were too high with a range from 31.9% to 42.2%. On the affordability front, the states ranged from to 50.5% to 60.7%.

Despite the cost concerns raised, open-ended responses indicated that available concessions helped assist people by making prescription medications more affordable. The concessions named included the Health Care Card, DVA, DVA Gold and Pensioner Card as well as Closing the Gap and Safety Net under the Pharmaceuticals Benefit Scheme (PBS). Other feedback indicated that the question of affordability depends greatly on what someone is being prescribed.

Frequency of Healthcare Appointments

In the past 6 months, how many times have you seen your GP and other healthcare providers?



Is this a number of appointments typical for you?

53% — **Yes** This is typical for me

37.3% — **No** I've had **more** healthcare appointments than usual

8.5% — **No** I've had **fewer** healthcare appointments than usual

1.2% — **Other**

Patient Perspective on Appointments

During COVID-19, appointments with GPs and other healthcare providers dropped overall in 2020 based on healthcare industry reporting. With the continuing pandemic and minimal flu season, only 6.4% of people had no visits to GPs or other healthcare providers in 6 months prior to taking the survey whereas 44.9% had 1-3 appointments and 48.6% had 4 or more healthcare-related appointments.

Overall, 53% of people said this level of appointments was typical for them, whereas 37.3% had more appointments than usual. Only 8.5% had fewer appointments than usual, and it can be presumed that concerns relating to COVID-19 may have been involved.

Health Comparison: Pre-Pandemic to Now

Which best describes your current health compared to when COVID-19 first affected us in March?

- My health is the same **64.8%**
- My health is better **14.2%**
- My health is worse **20%**
- Other **1%**

Patient Perspective on Current Health

Even with the continuing pandemic, 64.8% of people said their health is the same and 14.2% said it was better which may be connected with people getting more exercise during social isolation as noted in another survey question in this report. While 20% said their health was worse now, the survey did not have a follow-up to this for additional insight. However, in the open-ended responses, 28% of people flagged a decline in mental health.

Tech Support for Health

What technology-related services or devices do you use or are interested in using to support your health?

- Online appointment booking services **84.9%**
- Health apps **41.9%**
- Telehealth **41.9%**
- e-scripts (electronic presciptions vs paper) **40.2%**
- Wearable devices (i.e. Fitbit) **33.2%**
- Other **1.7%**

94.5% See the Benefit of Tech-Enabled Healthcare

The results show people are interested in a strong dose of tech with their healthcare.

94.5% of people are using or are interested in using products and services to support their health. Health apps, telehealth and e-scripts were all each chosen by more than 40 percent of respondents. Online appointment booking services were noted by 84.9%. Survey responses to this question should be viewed in the context that the majority of the respondents are already users of online booking services such as HealthEngine which may suggest an established propensity towards the use of technology which may bias their responses.

Within the open-ended responses, monitors or devices used to track and manage chronic health conditions were mentioned as another use of health-related tech. Given that there is openness and interest in technology across the board, there is opportunity to broaden people's use of key tools and services.

Surviving Social Isolation

What have you found to be the best ways to deal with social isolation? Select up to three.

54.2% Phone or video calls with friends, family, colleagues etc

40.2% Exercise more

37.9% Get outside in nature more

37% Spend more time on hobbies / activities

24.5% Watch T V more

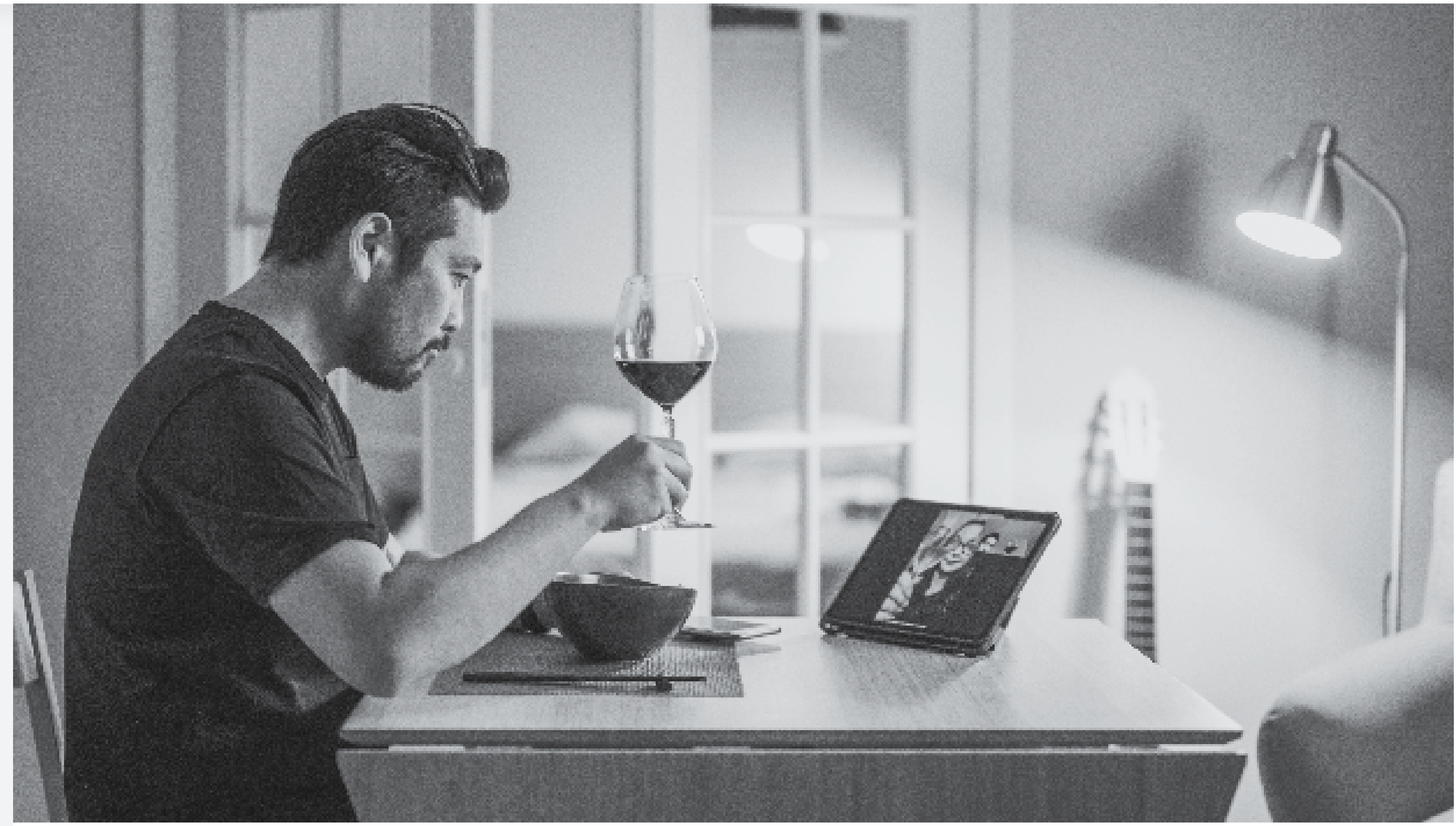
16.2% Read more

15.4% Work more

13.6% Seek mental health / wellness support

7.3% Meditation

Other **5.2%**



Surviving Social Isolation

The survey covered the timeframe of the arrival of the COVID-19 pandemic and subsequent waves. Top responses were: phone/video calls, exercise more, get outside in nature more and spend more time on hobbies/activities. 13.6% noted that they sought mental health/wellness support.

Within the open-ended responses, 44.6% said they didn't feel the effects of social isolation or didn't isolate due to location or essential work. This recognises that different parts of the country have had a range of pandemic experiences. 19.7% said they've spent more quality time with family and pets and 10.8% said they enjoyed the isolation experience or had a fairly solitary life ahead of isolation so there wasn't much change.

Closing

We hope this pulse check on healthcare in Australia gives you new perspective from patients all across Australia who took the time to share their experiences and be a part of this effort. Along with HealthEngine, we plan to produce the second report later this year which will allow for comparisons over time as well as new learnings and insights. Having a platform to share the patient voice is powerful and needed as we look to strengthen the patient experience and access to the healthcare they need.

If we can support you or your organisation to talk further about these results and how to help strengthen the patient experience, please get in touch. Together with HealthEngine, we'll look forward to future connections ahead and opportunities to focus on patient-centred care.

Stephen Mason
Australian Patients Association
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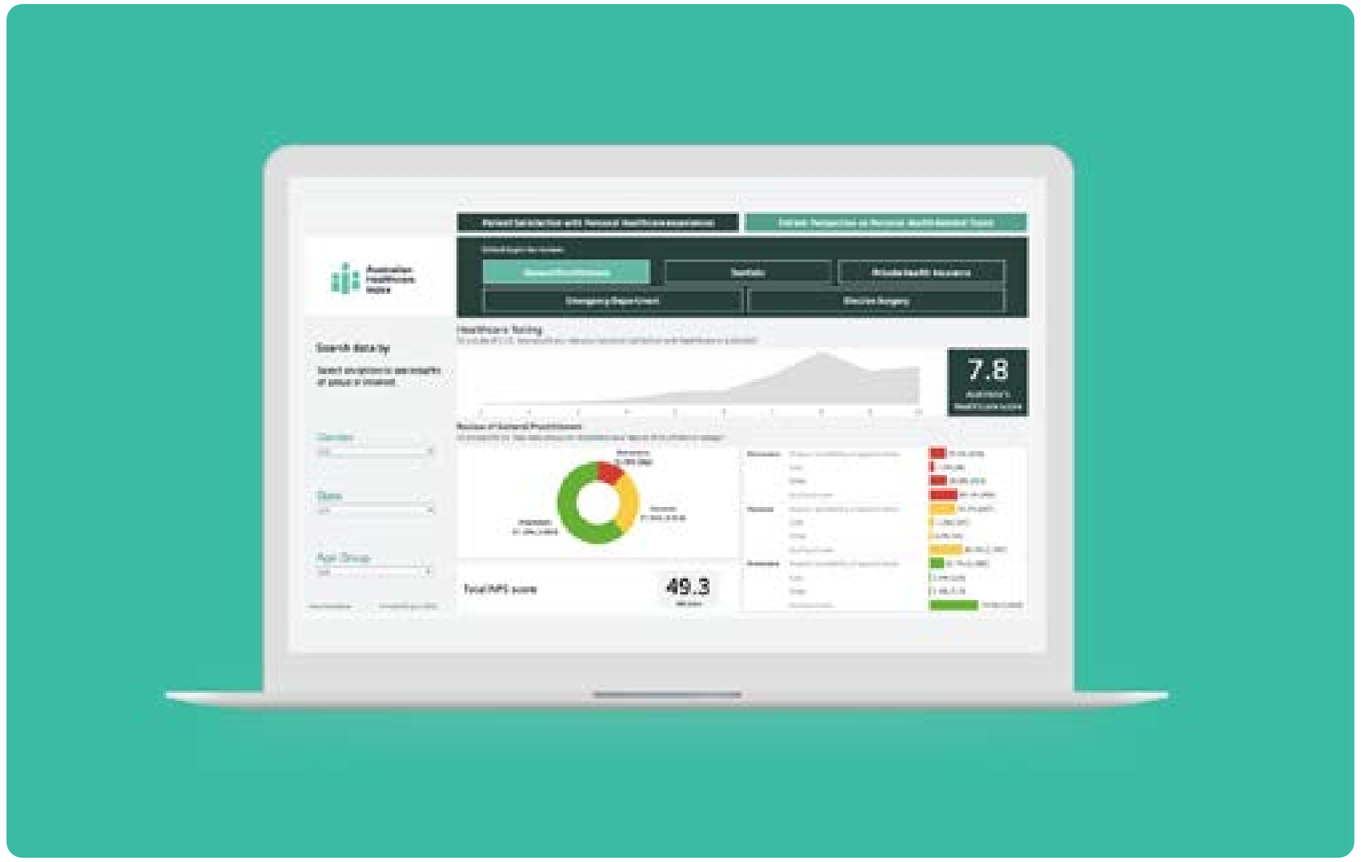
Survey Results & Dashboard Access

Supporting background

Survey questions and a breakdown of responses covered in this report are available for viewing on an interactive dashboard. Additional demographic breakdowns are available across states, age and gender as well.



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About the Australian Patients Association and HealthEngine

The Australian Patients Association

The Australian Patients Association is an independent not-for-profit organisation established to promote and protect the rights and interests of patients, and improve overall patient outcomes.

We will address important health issues impacting on patient care in the public and private healthcare system. We will research and develop sensible remedies to benefit all our supporters and the broader community. The Australian Patients Association also seeks to educate patients about their rights and choices, as well as support patients in need.

We believe that an effective patient support group representing the rights and interests of patients can have a positive influence on the development of national healthcare policy and reform, ultimately resulting in improved patient care and health outcomes.
The Australian Patients Association is governed by an enthusiastic board of directors and supported by a small secretariat and passionate volunteers.

HealthEngine

HealthEngine is Australia's largest consumer healthcare network and the #1 go-to for healthcare bookings. Founded in 2006, HealthEngine is on a mission to transform Australia's healthcare by making it easier for people to connect with their healthcare providers online and for health practitioners to deliver a great patient experience through technology.

More than 9 million Australians have made more than 47 million bookings on the platform. To find, book and manage medical and dental appointments, visit HealthEngine.com.au. For healthcare providers, please visit practices.healthengine.com.au to learn more and join Australia's largest network of patients.

Australian Patients Association

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