



Report 3 June 2022

# Australian Healthcare Index

Sharing people's perspectives and  
experiences with healthcare in Australia

[www.australianhealthcareindex.com.au](http://www.australianhealthcareindex.com.au)

# Contents

<b>Opening</b>	<b>3</b>	<b>Perspectives on Personal Health</b>	<b>17</b>
<b>About this Report</b>	<b>4</b>	Mental Health & Wellness	18
<b>Key Findings</b>	<b>5</b>	Vax Views: COVID-19 & Flu	20
<b>Learnings and Insights</b>	<b>6</b>	Prescription Medicine & Prescribing	22
<b>Learnings and insights: Healthcare Experiences</b>	<b>7</b>	Telehealth	24
Australia's Healthcare Rating	8	<b>Survey and dashboard access</b>	<b>25</b>
General Practitioners	10	<b>Closing</b>	<b>26</b>
Dentists	12	<b>About us</b>	<b>27</b>
Emergency Department	13		
Elective Surgery	14		
Private Health Insurance (PHI)	16		

### 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.

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# Opening

## Message from Dr Marcus Tan

With the Australian Healthcare Index, the voice of the patient is at the forefront. As Healthengine works to help Australians navigate the complex world of healthcare, we want to help elevate their experiences and interactions with our healthcare ecosystem and healthcare providers.

Together with the Australian Patients Association, we hope these learnings contribute to the greater healthcare community and inspire opportunities across the health sector to strengthen the patient experience and contribute to better healthcare journeys for all.

With the latest report, we continue to capture people's perspectives and experiences across the public and private healthcare ecosystem and look at key topical areas including mental health and wellness, prescription medication costs, telehealth and vax fatigue as the pandemic continues.

As we look to the future of Australian healthcare, there are many opportunities to explore and challenges to take on as we all work to contribute to patient-centred care. If you'd like to share your thoughts on the report or have any questions, I'd welcome hearing from you.



**Dr Marcus Tan**

Healthengine CEO and co-founder

## Message from Stephen Mason

Ensuring the patient's voice is heard is critical to help improve care and outcomes, and the Australian Healthcare Index is one way we help champion the interests of patients with Healthengine.

The report brings patients' perspective to the forefront and serves as a platform for us to share their collective views and messages with the broader health community, especially those managing our healthcare system. With our commitment to patient advocacy, we work with organisations across the health ecosystem, and know the Australian Healthcare Index will drive opportunities for discussion and collaboration.

With this report, we share the patient experience with ongoing elective surgery delays, ED wait times, continued cost concerns with private health insurance and prescription medication as well as new insights.

Through this pulse check on different aspects of Australian healthcare, there are learnings to take and changes to make as we look to support all current and future patients in Australia. We look forward to the conversations and opportunities ahead.



**Stephen Mason**

Australian Patients Association CEO

Population

# 11,652

## Survey participants

Age breakdowns

18-34 years old	30%	2172
35-49 years old	26%	3110
50-64 years old	24%	3847
65+ years old	20%	2523

Participation by state

ACT	2%	233
NSW	32%	3792
NT	1%	116
QLD	20%	2330
SA	7%	816
TAS	2%	233
VIC	26%	3030
WA	10%	1165

Gender

51% Female	49% Male	1% Other
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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 9/5/2022

# 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 third 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 mental health and COVID-related insights.

## Research and dashboard

During late April, we surveyed adults in Australia through an Alchemer online survey. Painted Dog Research was commissioned to analyse and process data collected by Healthengine. The final sample was 11,652 which 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 7-8) 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

Retently, 2021. What is a Good Net Promoter Score? (2021 NPS Benchmark). [Source here](#) [Accessed 18 January 2022].

# Key Findings

1

## Top 3 issues for Australian healthcare

Private Health Insurance costs, Emergency Department waits times and access to mental healthcare topped the list of concerns.

2

## Waiting for mental health & wellness support

59% of people across Australia who are seeking mental health support have been waiting 3+ months.

3

## Cost of prescription medication

Only 25% of people said that prescription medication is affordable.

4

## Patient loyalty to bulk bill vs GP

48% would make a change if GP moved from bulk bill to introduce an out of pocket cost. 16% would stay with GP regardless of out of pocket costs.

5

## Elective surgery wait times exceed category guidelines

56% of people needing Category 1 surgery, have been waiting 31 days or more for a surgery that should be done within 30 days.

6

## Continued PHI coverage kudos but cost cons

For people positive about PHI, coverage is top reason, but others continue to question the value for money & cost.

# Learnings and Insights



## Healthcare Experiences

Pages 8 to 17



## Perspectives on Personal Health

Pages 18 to 25



# **Learnings and insights: 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

7.2/10

Previous reports scores

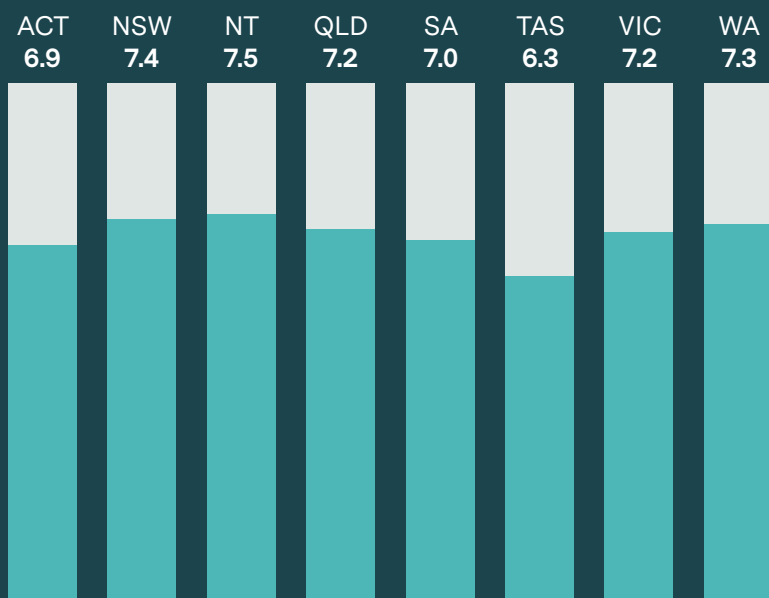
7.8/10 March 2021

7.6/10 October 2021

7.2/10 June 2022

As the pandemic continues, Australia's healthcare rating is dropping.

Average State Score



## The reasons for the rating

People were asked the reason(s) for their rating, and they shared a range of feedback in the open-ended responses. The chart below looks at the key themes coming from people who ranked Australian healthcare 8-10 or 1-3.

### Open-ended commentary

Respondents could provide multiple reasons which were grouped into key categories

## What is the reason/s for your rating on Australian healthcare?

### People rating 8-10

- 1 Good quality of care and medical staff (49%)
- 2 Good access and availability to healthcare (20%)
- 3 Affordable healthcare, Medicare is good (13%)
- 4 AU is better than other countries (10%)
- 5 Good public health system (9%)
- 6 Long wait times (5%)

### People rating 1-3

- 1 Poor quality of care and medical staff (34%)
- 2 Poor access and availability to healthcare (27%)
- 3 Long wait times for care including ED (24%)
- 4 Healthcare costs too expensive including PHI (23%)
- 5 Not enough mental health care support (14%)
- 6 Medical staff shortage and overworked (12%)



## Top issues facing Australian Healthcare

People shared their take on their top 3 issues facing Australian healthcare with private health insurance costs, emergency department waiting room times and access to mental healthcare topping the list.

Within the “other” response, themes that arose included dental care costs, healthcare staffing shortages (including regional areas), increasing costs, Medicare cuts and exclusions.

### ➤ What do you think are the top three issues facing Australian healthcare currently?

**45%**

Private Health Insurance Costs

**40%**

Emergency department waiting room times

**39%**

Access to mental healthcare

**32%**

Covid-19

**31%**

Delays to elective surgery

**27%**

Ambulance response times

**26%**

Aged care

**19%**

Ambulance ramping

**13%**

Obesity

**8%**

Cancer

**7%**

Other

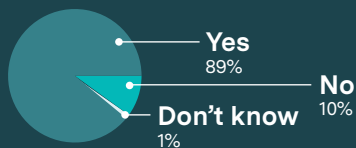
**3%**

Decrease in pathology testing

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?

**35** Net Promoter Score



## Continuity of care & cost realities

While 89% of people said they have a regular GP, nearly half of all respondents said they've been to one GP clinic for an in-person office visit or telehealth consult in the past six months. Only 13% said they've been to three or more GP clinics, which suggests most people look to one GP clinic to support their continuity of care.

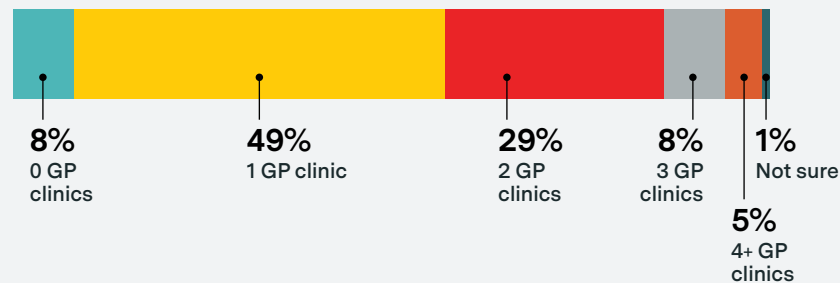
Cost does come in as a factor with 48% saying they would move to another bulk bill GP if their current GP introduced an out of pocket cost for a standard appointment. Only 16% said they'd stay with their GP regardless of any new out of pocket costs.

As people age, stats show they are less likely to make a change. Looking at age groups, only 38% of those age 65 or over said they'd switch GPs if an out of pocket cost was introduced whilst 56% of 18-34 year olds would make a change.





- In the past 6 months, how many different GP clinics have you had an appointment with either in-person office visit and/or telehealth consult?



- If your GP changed from bulk bill to introduce an out of pocket cost for a standard appointment, how would this affect you?

**48%**

would find a new bulk bill GP as I don't want to pay out of pocket costs

**16%**

would stay with my GP regardless of any out of pocket costs

Would stay with GP if out of pocket costs were

**17%**

\$20 or less

**2%**

\$50 or less

**5%**

\$30 or less

**3%**

Over \$50

**2%**

\$40 or less

**7%**

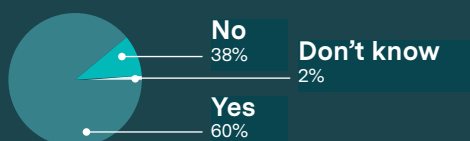
Not sure



## Patients review

# Dentists

## > Do you have a regular Denist/clinic?



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

**36** Net Promoter Score



## The cost of healthy teeth

Given only 60% of people said they have a regular dentist/clinic, the survey looked into why people don't have a regular clinic. Not wanting to pay out of pocket costs (26%) and not getting regular dental care (25%) topped the list, while 11% never go to the dentist or believe they don't need dental care.

Cost also came up as the top reason for people not recommending their dentist with the view that treatments aren't affordable. This was echoed in the "other" response tied to "Top issues facing Australian Healthcare" question where 12% of people identified dental care costs as a concern.

## What best describes why you don't have a regular dentist/clinic?



Patients use and review

# Emergency Department


- Have you been to an emergency department (ED) in the past 6 months?

**33%** Visited an ED  
3870 visits


- How satisfied were you with the ED experience:

**Public hospital**

**92%**  
3558 visits


  
**54%**  
Satisfied

  
**38%**  
Dissatisfied


  
**8%**  
Neither

**Private hospital**

**8%**  
312 visits

  
**72%**  
Satisfied

  
**21%**  
Dissatisfied






  
**7%**  
Neither

## 33% made a trip to the ED with 92% public visits vs 8% private





Satisfaction ratings for EDs were 54% for public vs 72% for private and dissatisfaction ratings were 38% for public vs 21% for private. Satisfaction is down and dissatisfaction is up from the Oct 2021 Australian Healthcare Index.

In terms of the ED experience, top reasons for dissatisfaction were aligned for public and private EDs and reasons for satisfaction were closely aligned.

### Top reasons for ED satisfaction

-  Helpful staff
-  Good quality of care
-  Reasonable wait times (private)
-  Good communication from staff (public)
-  Efficient admittance process

### Top reasons for ED dissatisfaction

-  Wait times too long
-  Inadequate staffing levels
-  Lack of/poor communication from staff
-  Poor quality of care

Top issues facing Australian healthcare included 3 areas related to ED use & access: ED waiting room times (40%), ambulance response times (27%) and ambulance ramping (19%).



The wait, surgery and patients review

# Elective Surgery

## People waiting to have elective surgery

11%

1237 people waiting

Public hospital

75%

933 waiting

Private hospital

25%

304 waiting

## Surgery categories & wait time breakdowns

Category 1

13%

Needing treatment within 30 days

Waiting 1-30 days

44%

Waiting 31-90 days

25%



Waiting 91-180 days

12%



Waiting 181-365 days

4%



Waiting a year+

15%



Category 2

26%

Needing treatment within 90 days

Waiting 1-30 days

15%

Waiting 31-90 days

24%

Waiting 91-180 days

20%



Waiting 181-365 days

15%



Waiting a year+

26%



Category 3

40%

Needing treatment within the next year

Waiting 1-30 days

13%

Waiting 31-90 days

16%

Waiting 91-180 days

16%

Waiting 181-365 days

19%

Waiting a year+

36%



21% Did not know category of surgery

## People who've had elective surgery in past 6 months

10%

1158 surgeries

## How satisfied were you with the elective surgery experience?

Public hospital

31%

362 surgeries



81% Satisfied



13% Disatisfied



6% Neither

Private hospital

69%

796 surgeries



90% Satisfied



7% Disatisfied



3% Neither















## Overview on elective surgery experience

At the time of the survey, 11% of people were waiting to have elective surgery with the majority tied to public hospitals. More concerning is 56% of people needing Category 1 surgery, have been waiting 31 days or more for a surgery that should be done within 30 days. (15% have been waiting over a year.)

Of those in need of a Category 2 surgery, 61% have been waiting beyond the recommended time of within 90 days. 36% of people needing Category 3 surgery have been waiting more than a year. The wait times reflect the ongoing stress on the public and private hospital systems and continued impact of the pandemic, leading to increased health risks for many.

For people who had surgeries go forward, overall satisfaction with the experience is high with 81% satisfaction in public hospitals and 90% satisfaction in private hospitals.

### Top reasons for elective surgery rating

	Public	Private
Satisfied	 Good quality of care during/after surgery	 Good quality of care during/after surgery
	 Efficient admittance process	 Efficient admittance process
	 Staff were helpful	 Wait time for surgery was reasonable
Dissatisfied	 Wait time for surgery was too long	 Lack of/poor communication from staff
	 Poor quality of care during/after surgery	 Other
	 Lack of/poor communication from staff	 Poor quality of care during/after surgery



## Patients review

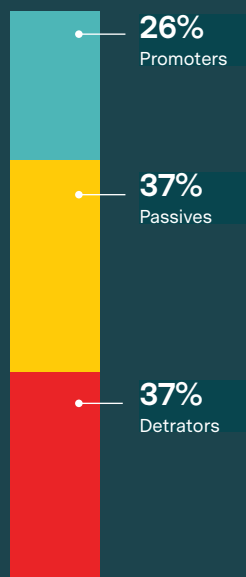
# Private Health Insurance (PHI)

## > Do you have private health insurance (PHI) ?



## > On a scale of 1-10, how likely are you to recommend your PHI to a friend or colleague

**-11** Net Promoter Score



### Top reasons for promoters

- ★ Good hospital coverage provided
- 🕒 Good extras coverage provided
- 💬 Good compared to other insurance plans

### Top reasons for detractors

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

## People's PHI pros and cons

64% said they have PHI, so respondents were more likely to have coverage than the 54.7% national average from the [APRA March 2022 quarterly report](#). People identified their PHI provider with 75% tied to Bupa, HBF, HCF, Medibank, Ahm Health Insurance and nib and the remaining 25% are with other providers.

As in past Australian Healthcare Index reports, pro-PHI people like their hospital coverage and extra coverage whilst the detractors question the value for money and affordability. The survey contributing to this report was done after the April rate increases and after the Australian Department of Health's [Private health insurance reforms](#) announced on 11 April. According to Department of Health, people find PHI complex, hard to understand what different policies cover and what they don't and don't fully understand what they are getting for their money. Learnings from the survey aligns to this.

Private Health Insurance cost was identified as the top issue facing Australian healthcare with 45% of people choosing it as one of their top 3.





# Perspectives on Personal Health

Pre-pandemic to now

# Mental Health & Wellness

- Over the past 6 months, which of the following best describes your mental health?


**58%**

My mental health is the same


**24%**

My mental health is worse


**18%**

My mental health is better

- If mental health declined, is it due to the continuing COVID-19 pandemic?


**40%**

Yes, related to COVID-19


**34%**

No, not related


**26%**

Not sure

## The COVID-19 effects & wait for care

With the ongoing pandemic, the increased needs for mental health and wellness support are well documented, but people are still waiting to access the care they need. 24% of people said their mental health has declined in the past 6 months with 40% identifying COVID-19 as contributing.

26% of all respondents have sought mental health support in the past 6 months and while 82% have received support, 18% are still waiting to get care. For those still waiting to get care, 28% have been waiting two months or less and 72% have been waiting for more than two months.

2022 [Research](#) from the Australian Psychological Society speaks to the wait time for care and found since the start of the pandemic 88% of psychologists have seen an increase in demand for services and that 1 in 3 psychologists are unable to see new clients. Prior to the pandemic only 1 in 100 psychologists were not taking new clients.



As covered earlier in the report,

**access to mental healthcare was identified as a top issue facing Australian healthcare with 39% of people choosing it was one of their top 3 concerns.**





## The time to support mental health care

> Have you sought any form of mental health support in past 6 months?



**Yes**  
**26%**

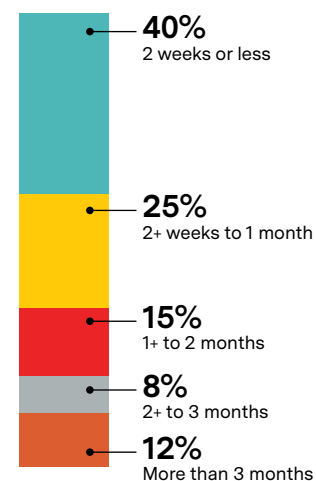


**No**  
**74%**

> If yes, have you received support?

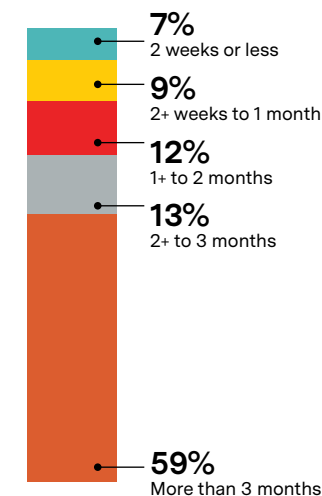
**82% Yes**

How long did it take to access the support/care you needed?



**18% No**

How long have you been waiting to access the support/care you need?

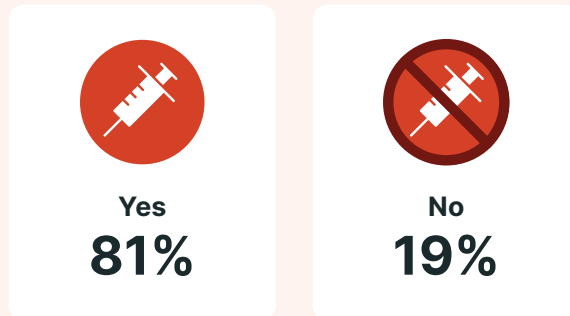




COVID-19 Vaccination

# Vax Views: COVID-19 & Flu

## > Have you had your COVID-19 booster?



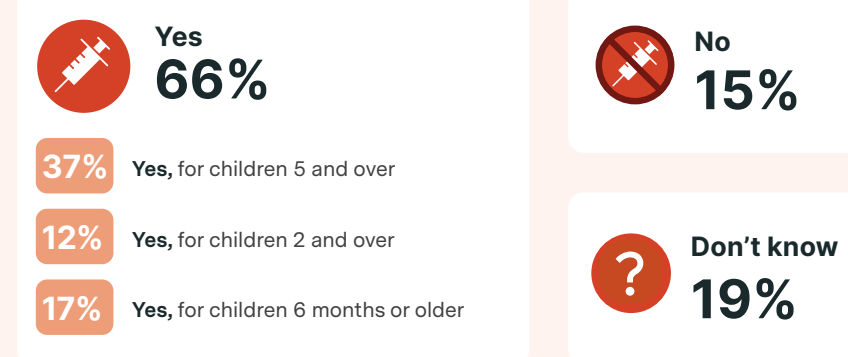
## > Why haven't you had your COVID-19 Booster?

- 29% After having two COVID-19 vaccinations, I don't feel I need the booster
- 28% Will get the booster but haven't made time to get it yet
- 15% Other
- 12% Chose not to be vaccinated for COVID-19
- 12% Not eligible yet due to timing of my vaccination course
- 4% Waiting for another booster type to be available

## > For future COVID-19 boosters, how long should booster last and be effective?



## > As the COVID-19 vaccinations continue for children age 5+ and research continues for children under 5, are you in favour of COVID-19 vaccinations for children?





## People's take on the COVID-19 & Flu vaccinations

Booster rates of AHI respondents sits at 81%, so it represents a higher percentage than current national rates of [69.4%](#) (as of 09 May 2022, Australian Immunisation Register Data). Looking at the group that hasn't been boosted, the top reasons could be tied to vaccine fatigue with 29% not feeling the need to get a booster after their two doses while 28% will get the booster, but haven't made the time to get it.

In terms of the future COVID-19 boosters, 45% of people want a once a year booster, while 19% said 6 months.

As the vaccination effort continues for kids age 5 and older and research continues for children under 5, 66% are in favor of COVID-19 vaccinations for children across different age groups.

Moving from the COVID-19 vaccination to Flu vaccination as we face the first real flu season since the start of the pandemic, how are people feeling about the flu vaccination? 67% plan to get the vaccine. Not surprisingly, age determines the prioritisation of this as 57% of 18-34 year olds plan to get compared to 89% of those aged 65 or older.

### ➤ Will you get the flu vaccine for the 2022 flu season?



## Patients review

# Prescription Medicine & Prescribing

Are you currently taking prescription medication?



Yes  
**62%**



No  
**38%**

How do you feel about the cost of prescription medication?



Concession card makes it affordable **31%**



It is affordable **25%**



Cost is outside regular budget, but I make room for it when needed **20%**



Pharmacy Benefits Scheme (PBS) makes it affordable **18%**



Cannot afford to get the prescriptions I need **3%**



Other **3%**

## The cost of prescription medication

Patients agree or disagree



Agree **67%**

**"Prescription medicine is affordable to me"**



Disagree **24%**  
(up 5% from last report)



Neither **9%**

## Pharmacists supporting the patient journey

Would you be comfortable with pharmacists who have additional training diagnosing select conditions\* and needs and then prescribing the needed medications to you?

\*such as asthma, type 2 diabetes and high blood pressure as well as oral contraceptives and travel medicine.

**53%** Yes

**25%** No

**6%** Not sure

**15%** I'd want to learn more about included conditions

**1%** Other





## People's take on prescription medicine & pharmacists prescribing

### Question of affordability

Only 25% said that prescription medication was affordable, which suggests people may have to choose between medication and other essentials.

Nationally, 62% of adults take prescription medication and concession cards and the Pharmacy Benefits Scheme are noted as helping make prescription medication affordable. 3% of people said they cannot afford to get the prescriptions they need and 20% said it's outside their regular budget, but will fit it in when needed.

### 53% comfortable with an increased role for pharmacists

Recognising pharmacists' role in people's healthcare journeys, the survey included a question related to an upcoming Queensland government pilot program where pharmacists will be given the power to diagnose select conditions and prescribe medications.

53% said they would be comfortable with pharmacists diagnosing and prescribing for select conditions, whilst 25% said no and 15% would want to know more about the included conditions to make a decision.



**Over half of respondents said they would be comfortable with pharmacists, who have additional training, diagnosing select conditions and needs, and then prescribing medications.**



# Telehealth

- Have you had a telehealth appointment by phone or video in the past 6 months?



Yes  
**56%**



No  
**44%**

## How satisfied were you with the telehealth experience?



Satisfied **80%**



Dissatisfied **12%**



Neither **8%**

## Top reasons for telehealth rating

### Satisfied



Good communication from healthcare provider



Received good medical advice



Convenient



Appointment covered by Medical Benefits Scheme

### Dissatisfied



Condition/concern was not resolved



Poor communication from healthcare provider



Poor quality of care



Appointment start time was delayed

## People's take on telehealth

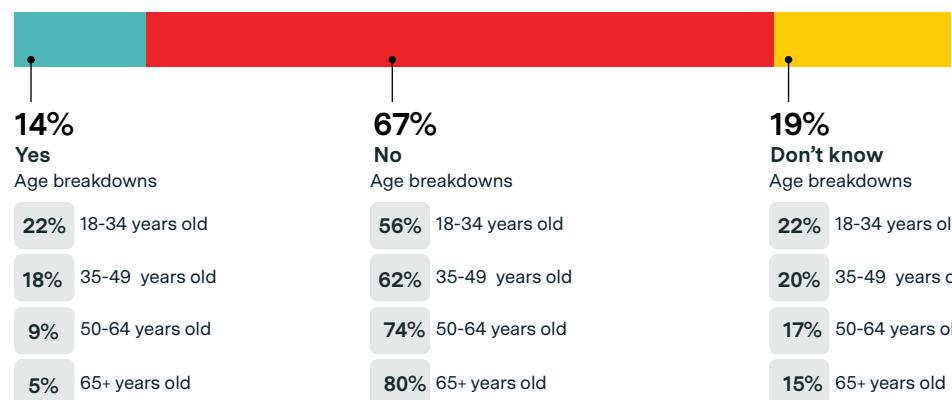
With the progression of telehealth use and acceptance over the course of the continuing pandemic, 56% of respondents had a telehealth appointment in past 6 months and 80% of them were satisfied with the experience.

The criteria requiring a patient to have had a face-to-face consult with the same GP or another practitioner at the same practice within 12 months to access the Medicare rebate for general telehealth appears to be a barrier that disproportionately affects younger people.



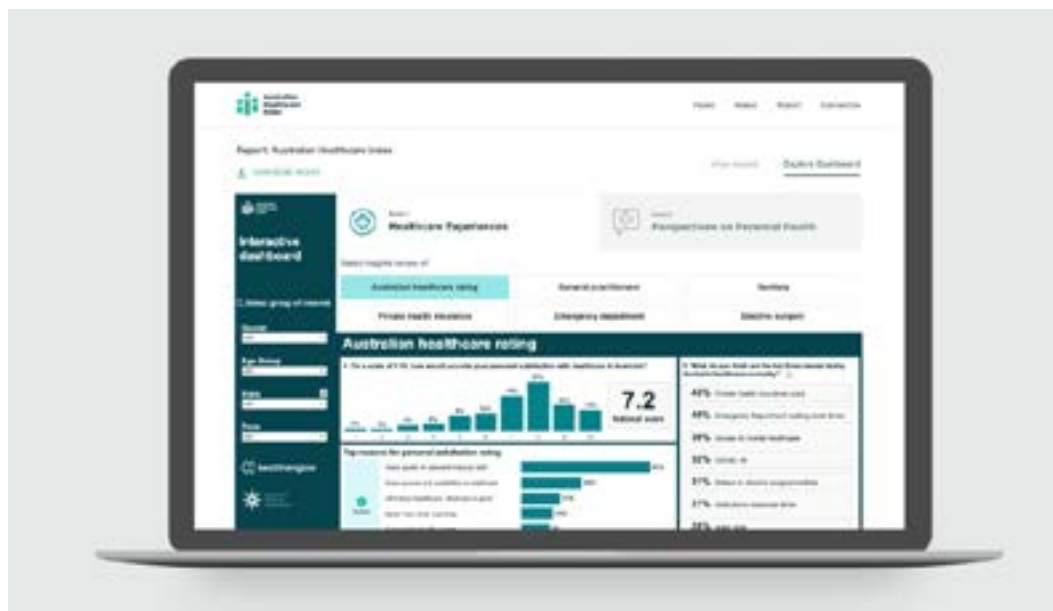
Overall, 14% of people said the rebate criteria has prevented them from accessing telehealth to get timely and affordable care, whilst 22% of people aged 18-34 faced this barrier.

- To access the rebate for general telehealth, you need to have had a face-to-face consult with the same GP or another practitioner at the same practice within 12 months. Has this prevented you from accessing telehealth to get timely and affordable care?



# Survey and dashboard access

## Supporting background



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

Web:

[www.australianhealthcareindex.com.au](https://www.australianhealthcareindex.com.au)

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# Closing

On behalf of Healthengine and the Australian Patients Association (APA), we want to thank the thousands of people who took the time to participate in the Australian Healthcare Index survey and contribute their thoughts on and experiences with Australian healthcare and healthcare providers.

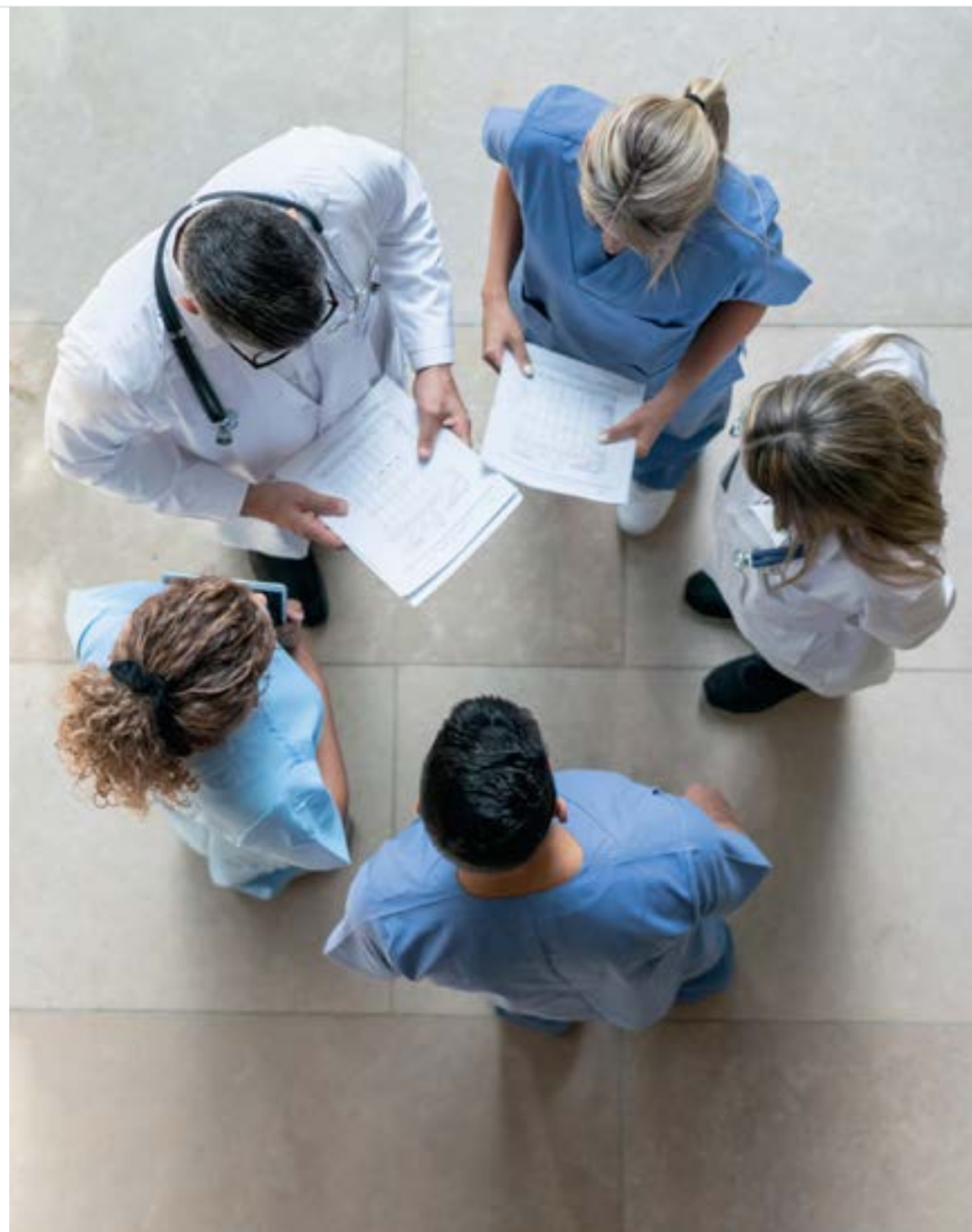
We hope the latest report provides a helpful and informative pulse check across the patient journey through the public and private healthcare systems. It also can serve as catalyst for conversation and exploration of opportunities to strengthen commitments to patient-centred care and how our collective efforts contribute to having one of the greatest healthcare system in the world.

If Healthengine and the APA can support your organisation, please get in touch. Or if there's a topic you'd like us to explore in a future Australian Healthcare Index, please let us know. We look forward to future connections and collaboration to strengthen the patient experience and access to the care people need and expect.

**Dr Marcus Tan**

Healthengine CEO and Co-founder

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# About us



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](https://healthengine.com.au) or download the Healthengine App for Android or iOS. For healthcare providers, please visit [practices.healthengine.com.au](https://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](https://patients.org.au).



Connecting healthcare

## Healthengine and the Australian Patients Association

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