November 2022

Report 4

Australian Healthcare Index

Sharing people's perspectives and experiences with healthcare in Australia.

healthengine

Australian Patients Association

australianhealthcareindex.com.au

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Contents

Australian Healthcare Index

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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.

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Opening

Message from Dr Marcus Tan

The Australian Healthcare Index features the healthcare experiences of more than 11,000 people across Australia. As Healthengine works to help make healthcare more affordable, convenient and certain, we also want to bring the voice of the patient to the forefront and share their experiences across the public and private healthcare ecosystem.

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

The June 2022 Australian Healthcare Index report brought attention to patients' struggle to access and afford essential healthcare, and the November report echos this with an additional look into people's GP experiences given the realities of the decline of bulk-bill and the GP shortage, contributing to higher out of pocket costs and longer wait times for appointments.

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 & Founder

Message from Stephen Mason

To help improve care and outcomes, ensuring the patient's voice is heard is critical, 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 as they face continuing wait times across critical elective surgery, the Emergency Department and mental healthcare as well as cost concerns tied to prescription medication, private health insurance, dental care and the decline of bulk-bill GP practices.

Through this review 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

11,405 Survey participants

Age breakdowns

18-34 years old — 30%

35-49 years old — 26%

50-64 years old — 24%

65+ years old — 20%

Participation by state

ACT — 2%

NSW — 32%

NT — 1%

QLD — 20%

SA — 7%

TAS — 2%

VIC — 26%

WA — 11%

Gender

51% Female | 48% Male | 1% Other

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 prior to the announcement on 14/10/2022

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 fourth report. Adults across the country provided personal points of view and experiences with the public and private healthcare ecosystem with primary care, private health insurance (PHI), emergency departments and elective surgery, along with input on timely healthcare topics including mental health, prescription medication costs and telehealth.

Research and dashboard

During late September we surveyed adults in Australia through an online survey run by Painted Dog Research. They were also commissioned to analyse and process data from the survey. The final sample was 11,405 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.

All figures are percentages unless otherwise indicated. Some figures may add up to 99% or 101% due to rounding to the nearest whole number. Figures are weighted to the latest ABS census data.

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, Pharmacist 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

Key findings

Top 3 challenges for Australian healthcare

GP, nurse & healthcare worker shortage, Emergency Department wait times and increasing costs to see GP topped the list of challenges people would like the Government and health industry prioritise and fix.

Still waiting for mental health support

64% of people chose mental health as a health condition needing better access to support services.

In addition, over 1 in 4 Australians sought mental health support in past 6 months and of that group, 81% got care but 19% are still waiting. Within that group, 71% have been waiting for over 2 months.

Skipping the script

Over 1 in 5 Australians (22%) have gone without needed prescription medication due to cost.

Patients face critical delays for elective surgery

43% of crucial Category 1 surgeries have been delayed beyond the stipulated time of within 30 days. But it's not just Category 1 patients affected as Category 2 (57%) and 3 (39%) patients also face wait times beyond recommended treatment times.

GP patients pay up

Of the 26% of people who have experienced a cost change in the past year to see the GP, 88% are now paying more and 53% said they are now going less often.

Waiting for the GP & in the Emergency Department

In the past 6 months, 40% of people said they've experienced a longer wait time to see their GP for a general consult. 42% of people identified ED wait times as one of the 3 top challenges for Australian healthcare.

Learnings and insights

Healthcare experiences

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Perspectives on personal health

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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

7.1 | 10

Previous reports scores

March 2021	October 2021	June 2022
7.8/10	7.6/10↓	7.2/10↓

Average state score

ACT	6.9
NT	6.9
SA	7.1
VIC	7
NSW	7.1
QLD	6.9
TAS	6.3
WA	7.3

The reasons for the rating

Australian Healthcare Index survey participants gave Australian healthcare a score of 7.1 which has been on decline since the first report in March 2021. People were asked the reason(s) for their rating, and they shared a range of feedback via open-ended responses. The chart below reviews the key themes coming from people who ranked Australian healthcare 9-10 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 9-10

- 21% Good access and availability to healthcare
- 21% Good quality of care and medical staff
- 21% Positive past experiences with healthcare
- 14% High quality healthcare
- 10% AU healthcare is better than other countries

People rating 1-3

- 25% Poor quality medical staff
- 22% Long wait times for care
- 20% Healthcare is too expensive
- 13% Bulk billing not offered
- 11% Received wrong diagnosis

Top challenges for Australian healthcare

People identified what they see as the top 3 healthcare challenges they'd like to see the Australian government and health industry prioritise and fix. GP, nurse and healthcare worker shortage, Emergency Department wait times and the increasing out-of-pocket costs to see a GP/doctor have topped the list. Private Health Insurance costs, mental healthcare and aged care followed.

What do you think are the top three healthcare challenges for the Australian government and health industry to prioritise and/or fix? (select up to 3)

47%	GP, nurse and healthcare worker shortage
42%	Emergency Department wait times
33%	Increasing out-of-pocket costs to see a GP or doctor
30%	Private Health Insurance costs
29%	Mental Healthcare
22%	Aged Care
21%	Ambulance Service
17%	Elective Surgery delays
16%	Prescription Medication costs
14%	Rural/Remote care
11%	NDIS/disability care
6%	Something else

The search for support

Medical conditions

2021 Census Data identified that over 8 million Australians have a long-term health conditions. For the first time, the Australian Healthcare Index survey asked people about medical conditions and access to support services. Based on their experiences, survey respondents identified Mental Health (64%), Cancer (37%) and Dementia (28%) as top conditions needing better access to support services.

Go to for health advice

For non-emergency health concerns, 58% of people's first stop is still the GP, even though wait times are increasing and many patients face increasing out-of-pocket costs. 17% are paging "Dr. Google" while 8% said they consult with friend or family member and 7% head to the pharmacy for initial medical advice.

The biggest variances were tied to the 18-34 and 65+ age groups. For those aged 18-34, GPs are the first go to for 46% while 23% head to Google first and 14% to friend or family member. For those aged 65+, GPs are the first go for 72% while only 9% head to Google and only 4% ask a friend or family member.

From your experience, which of the following medical conditions need improved access to support services?

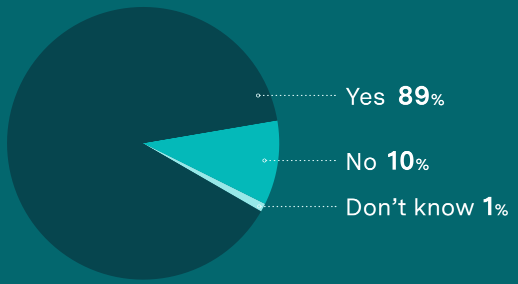
64%	Mental health	37%	Cancer	28%	Dementia
26%	Drug/alcohol dependence	25%	Permanent disability	24%	Heart disease
23%	Obesity	17%	Diabetes	9%	Something else

For non-emergency health concerns, who/what is your first go to for health advice?

58%	GP	17%	Google	8%	Friend or family member
7%	Pharmacist	5%	Healthcare website	3%	Hospital
2%	Other				

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?

34 Net Promoter Score

53% Promoters | 27% Passives | 19% Detractors

Top reasons for promoters

- 69% Good quality of care
- 66% Good medical advice
- 58% Convenient ways to book appointments (phone, online, email)
- 47% Clinic offers bulk-billing
- 46% Staff are helpful

Top reasons for detractors

- 43% Poor availability of booking times
- 38% Difficult to book appointments
- 31% Received poor medical advice/misdiagnosis
- 31% Received poor quality of care/Waiting room times too long
- 27% Clinic doesn't offer bulk-billing

Increasing costs & wait times

Across mainstream and healthcare media, the decline of bulk bill GP practices and the GP shortage are common storylines, but what are people experiencing and feeling first hand? The following page delves into survey results tied to patient costs and wait times and how this is affecting them.

Cost concerns

26% of people said the cost to see their GP changed in the past year, with 88% paying more at a time when the cost of living is increasing. Only 10% changed their GP/clinic due to costs whilst more concerning is 53% said the increasing costs mean they will go less often to the GP. 36% said the increased costs doesn't change anything or affect them.

For the NPS detractors, 27% chose clinic doesn't offer bulk billing as a reason for their GP score. For promoters, 47% highlighted clinics offering bulk billing as reason to recommend.

Have increasing costs influenced you going to your GP clinic?
(select all that apply)

53%	I go less often
36%	It hasn't changed anything/hasn't affected me
17%	I expect more value from the GP/clinic
11%	I check with pharmacist first
10%	I changed GP/ clinic
8%	Something else
6%	I go to the hospital or emergency department
3%	I prefer to see a specialist

How much do you currently pay for a standard consult with your GP/clinic?

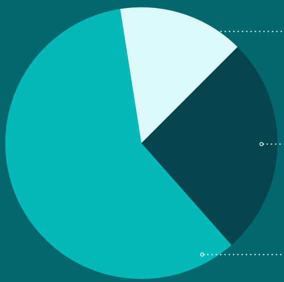
I get bulk billed **61%**

$40-60 **14%**

$61-80 **14%**

Over $81 **11%**

Has what you pay changed in the past year?



88% **are paying more**

- 19% pay up to $10 more
- 24% pay $11-20 more
- 45% pay $20+ more

12% **are paying less**

- 2% pay up to $10 less
- 3% pay $11-20 less
- 8% pay $20+ less

Wait times

Looking at wait times, 82% said they can see their GP within a week of booking but only 11% can get in same day, 31% in 1-2 days and 41% in 3-7 days. 15% said they have a wait time of 2-4 weeks and 2% said over a month. For NPS detractors, 43% noted poor availability of booking times.

In the past 6 months, 40% of people said they've experienced a longer wait time to see their GP, from time of booking to appointment.

How long do you have to wait to see your regular GP?

82% **1 week or less**

- **11%** Same day
- **31%** 1-2 days
- **20%** 3-4 days
- **8%** 5-6 days
- **13%** 1 week

16% **2-4 weeks**

- **10%** 2 weeks
- **4%** 3 weeks
- **2%** 1 month

2% **over a month**

Has this changed over the last 6 months?

56% **had no change**

40% **longer wait**

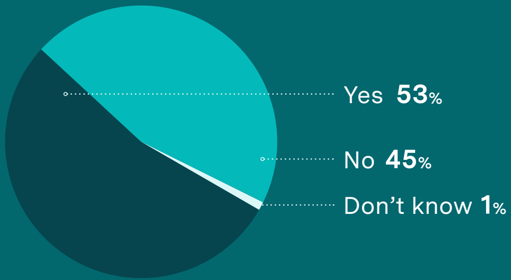
- **13%** Waiting a week+
- **13%** Waiting 3-7 days
- **14%** Waiting 1-2 days

4% **shorter wait**

- **2%** Waiting 1-2 days
- **1%** Waiting 3-7 days
- **1%** Waiting a week+

Dentists

Do you have a regular Dentist/clinic?



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

34 Net Promoter Score

Top reasons for promoters

- 82% Good quality of care
- 62% Staff are helpful
- 54% Good communication from staff
- 53% Received good advice
- 52% Waiting room times are reasonable

Top reasons for detractors

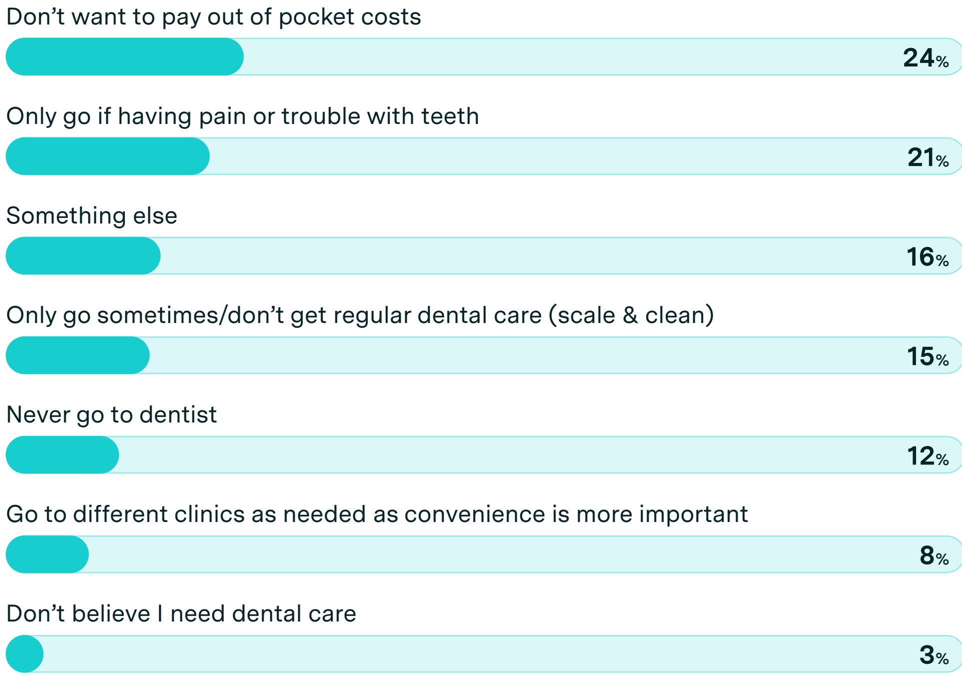
- 45% Treatments aren't affordable
- 27% Other
- 24% Poor quality of care
- 21% Poor availability of booking times

The cost of healthy teeth

With only 53% of people having a regular dentist/clinic, a drop of 7% since June report, the survey asked why people didn't have a regular dentist. Similar to the June report, not wanting to pay out of pocket costs (24%) topped the list whilst 21% will only go if they have pain or trouble with teeth. 12% said they never go to the dentist. For NPS promoters recommending their dentist, 82% said good quality of care was a top reason.

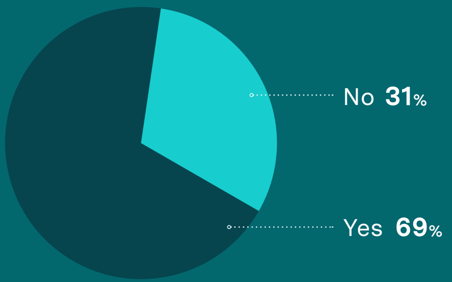
Cost once again came up as the top reason for people not recommending their dentist with the view that treatments aren't affordable with 45% citing that.

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



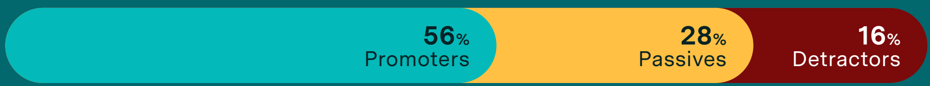
Pharmacists

Do you have a regular pharmacist/pharmacy?



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

40 Net Promoter Score



Top reasons for promoters

- 69% Staff are helpful
- 62% Wait time for filling prescriptions is reasonable
- 56% Open on weekends and/or evening hours
- 54% Good communication from staff

Top reasons for detractors

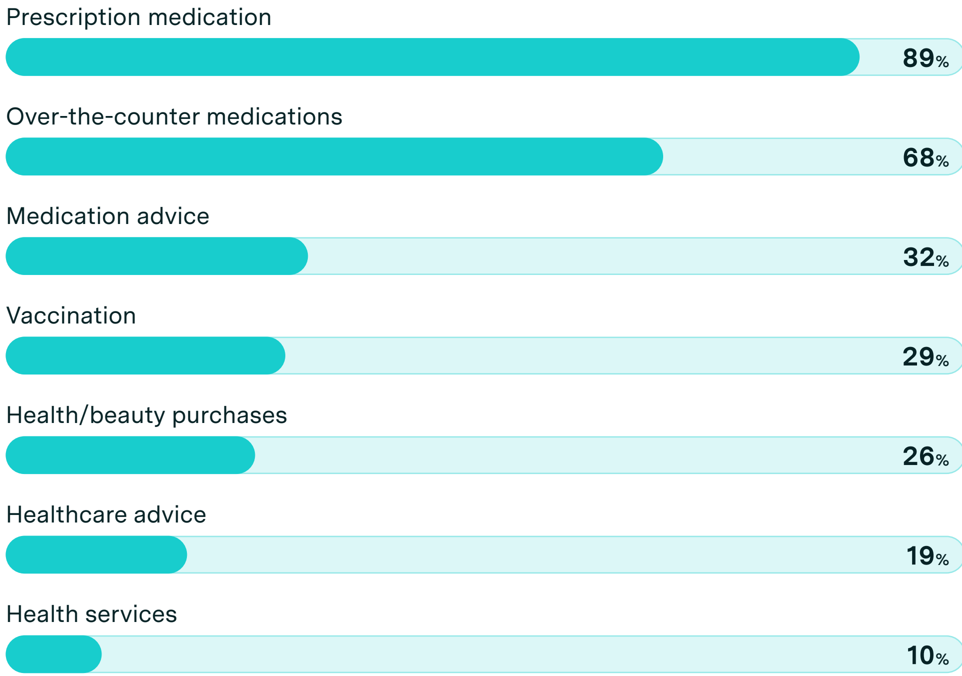
- 38% Wait time for filling prescriptions is too long
- 30% Something else
- 29% Lack of/poor communication from staff
- 26% Staff are not helpful

The pharmacy beyond prescriptions

69% of people said they have a regular pharmacist/pharmacy and the people behind the counter are the #1 reason why 57% of people would recommend their pharmacist/pharmacy. Beyond the trip to the pharmacy for the expected prescription and over-the-counter medication, 32% of respondents look to their pharmacist for medication advice, 29% for vaccinations and 19% for healthcare advice. Pharmacists are also the first go to for 10% of people before they book a GP appointment due to an increase in GP consult costs.

Ahead on page 24, the report looks at concerns around prescription medication costs as well as preferences for paper prescription vs e-script.

In the past 6 months, what have you used the pharmacy for?



Emergency Department

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

37% visited an ED

How satisfied were you with the ED experience?

	Satisfied	Dissatisfied	Neutral
Public Hospital 92%	50%	41%	10%
Private Hospital 8%	76%	16%	8%

Top concerns for public and private ED continue

Based on 37% of survey respondents who made a trip to the ED in the past 6 months, satisfaction with private hospitals increased 4% and decreased 4% for public hospitals compared to the June Australian Healthcare Index report. Yet, top concerns aligned for both: long wait times, inadequate staffing and poor communication from staff.

Top reasons for ED satisfaction

- Helpful staff
- Good communication from staff (public)/Efficient admittance process & Good ED conditions (private)
- Good medical advice (public)/ Reasonable wait times (private)

Top reasons for ED dissatisfaction

- Wait times too long
- Inadequate staffing levels
- Lack of/poor communication from staff
- Poor quality of care (public)/ Difficult admittance process (private)

Top challenges facing Australian healthcare tied to ED use & access:

ED waiting room times (42%) and ambulance services (21%) given ambulance wait times and ramping.

Elective Surgery

People waiting to have elective surgery

12%	Public hospital	Private hospital
	75%	25%

People who've had elective surgery in past 6 months

10%

Surgery categories & wait time breakdowns

Category 1	Category 2	Category 3
13% Needing treatment within 30 days	29% Needing treatment within 90 days	35% Needing treatment within the next year
57% Waiting 1-30 days	18% Waiting 1-30 days	10% Waiting 1-30 days
14% ⚠ Waiting 31-90 days	25% Waiting 31-90 days	20% Waiting 31-90 days
4% ⚠ Waiting 91-180 days	19% ⚠ Waiting 91-180 days	17% Waiting 91-180 days
8% ⚠ Waiting 181-365 days	12% ⚠ Waiting 181-365 days	15% Waiting 181-365 days
17% ⚠ Waiting a year+	26% ⚠ Waiting a year+	39% ⚠ Waiting a year+

23% did not know category of surgery.

Please visit the interactive dashboard at AustralianHealthcareIndex.com.au to view elective surgery wait time breakdowns for public and private hospitals.

How satisfied were you with the elective surgery experience?

		Satisfied	Dissatisfied	Neutral
Public Hospital	33%	77%	17%	6%
Private Hospital	67%	92%	5%	3%

The wait for elective surgery continues

At the time of the survey, 12% of people were waiting to have elective surgery across public (75%) and private (25%) hospitals. Wait times across all three categories of surgeries remain concerning. 43% of people needing Category 1 surgery, have been waiting 31 days or more for a surgery that should be done within 30 days, and 17% of that group have been waiting over a year (2% increase from the June report).

For people needing a Category 2 surgery, 57% have been waiting beyond the recommended time of within 90 days (4% decrease from the June report - 61%). 39% of people needing Category 3 surgery have been waiting more than a year (3% increase from the last report). These wait times demonstrate the continued stress on the public and private hospital systems and the lingering impact of the pandemic while contributing to increased health risks for many people who are waiting for critical and life improving – or life saving – surgeries.

For the 10% of people who had surgeries go forward in past 6 months, 92% of private hospital patients were satisfied whilst 78% of public hospital patients were satisfied.

Top reasons for Elective Surgery satisfaction

Public
- Good quality of care during/after surgery
- Staff were helpful
- Efficient admittance process

Private
- Good quality of care during/after surgery
- Efficient admittance process
- Wait time for surgery was reasonable

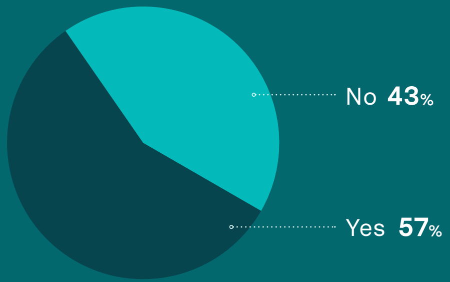
Top reasons for Elective Surgery dissatisfaction

Public
- Wait time for surgery was too long
- Poor quality of care during/after surgery
- Lack of/poor communication from staff

Private
- Lack of/poor communication from staff
- Poor quality of care during/after surgery
- Surgery was not affordable, Staff were not helpful

Private Health Insurance (PHI)

Do you have private health insurance (PHI)?



55.2% is national average from the APRA June 2022 quarterly report.

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

-9 Net Promoter Score

29% Promoters
33% Passives
38% Detractors

Top reasons for promoters

- 49% Good hospital coverage provided
- 47% Good extras coverage provided
- 42% Good customer service experience

Top reasons for detractors

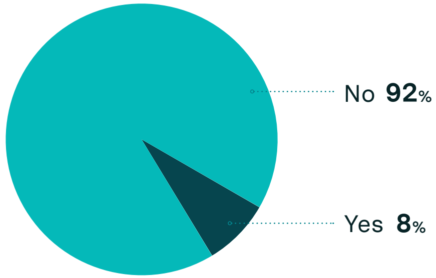
- 59% Poor value for money
- 57% Price of insurance is not affordable
- 38% Poor extras coverage provided

The pros and cons of PHI

In a year where private health insurance premiums increased and hit policy holders across the board, only 8% of people said they switched their PHI provider in past six months. 63% said cost was the primary driver.

As in past Australian Healthcare Index Reports, more PHI policy holders are less likely to recommend their PHI, with reasons tied to price and product. People who feel more favourably cite products and people (customer service) as their reasons.

Have you changed PHI providers in the past 6 months?



What was the reason for changing your PHI provider?

Cost 63%
Extra benefits 40%
Hospital cover 30%
Other 13%

30% of people chose PHI costs as one of their top 3 challenges facing Australian healthcare.

Learnings and insights

Perspectives on personal health

Mental Health & Wellness

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

20% My mental health is better

23% My mental health is worse

57% My mental health is the same

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

31% Yes, related to COVID-19 (↓ 9% from June report)

40% No, not related

29% Not sure

COVID concerns lessen but need for mental health care does not

While COVID-19 pandemic concerns decline in Australia and around the world, the need for mental health and wellness support continue. 23% of people said their mental health has declined in the past month remains consistent with the June Australian Healthcare Index report (24%), but only 31% identified COVID-19 as a contributing factor (down 9% from last report).

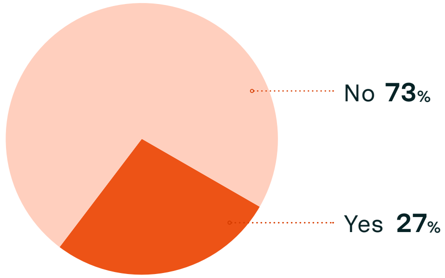
27% of all respondents have sought mental health support in the past 6 months and whilst 81% have received support, 19% are still waiting to get care. These figures are consistent with the June report, perhaps suggesting stabilisation versus progress. While 28% have been waiting two months or less, 71% have been waiting more than two months to get support.

The realities of wait times are noted in 2022 Research from the Australian Psychological Society:

- 88% of psychologists have seen an increase in demand for services since start of pandemic
- 1 in 3 psychologists are unable to see new clients vs pre-pandemic figure of only 1 in 100 psychologists

The time to support mental health care

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



If yes, have you received support?

81% Yes

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

- **37%** 2 weeks or less
- **26%** 2+ weeks to 1 month
- **17%** 1+ to 2 months
- **9%** 2+ to 3 months
- **11%** More than 3 months

19% No

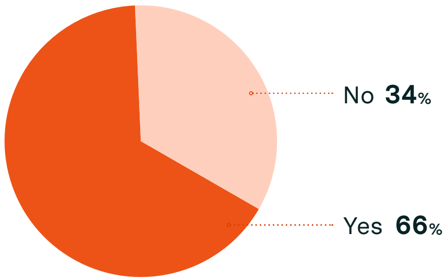
How long have you been waiting to access the support/care you need?

- **9%** 2 weeks or less
- **9%** 2+ weeks to 1 month
- **10%** 1+ to 2 months
- **9%** 2+ to 3 months
- **62%** More than 3 months

As covered earlier in the report, access to mental healthcare was identified as a top challenge for Australian healthcare with 29% of people choosing it was one of their top 3. In addition, 64% identified mental health as the top health concern needing better access to support services.

Prescription Medicine

Are you currently taking prescription medication?



People agree or disagree
“Prescription medication is affordable to me.”

56% Agree (↓ 11% from June report)

30% Disagree (↑ 6% from June report)

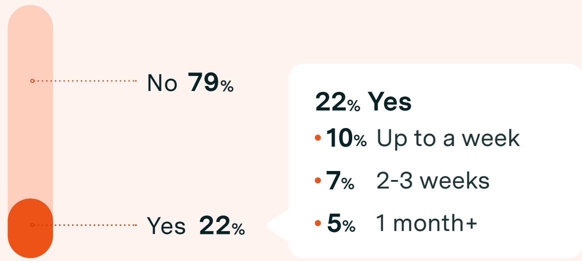
14% Neutral

Cost concerns continue

In the current economic climate, prescription medication costs continue to cause concern. Slightly more than 1 in 5 people said they’ve had to go without prescription medication for a week or more due to cost concerns. In addition, 30% of people disagreed with the position that prescription medication is affordable, an increase of 6% since the June report.

Help should be on the way with the recent medication legislation which will cut the maximum general co-payment on Pharmaceutical Benefits Scheme (PBS) medicines from $42.50 to $30. When it goes into effect on 1 January, 2023, millions of Australians will pay almost 30% less for PBS scripts. This marks the first time in 75 years, that the maximum cost of general scripts under the PBS will fall.

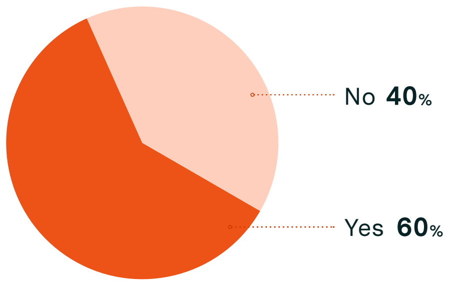
Have you had to go without prescription medication due to cost concerns?



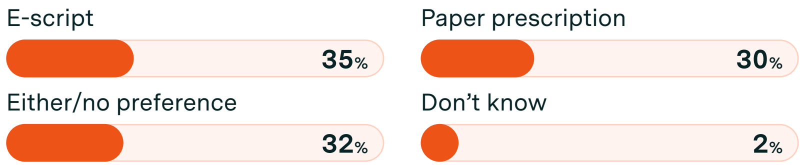
E-script or paper script?

When it comes to prescription format, 60% of people have received an e-script on other mobile in past 6 months with people from the ACT (64%) and VIC (69%) leading the way. But e-script is not a distinct preference as it’s split with 35% of people preferring e-script, 30% sticking with paper and 32% happy with either. ACT (42%) and VIC (38%) are also top states preferring e-script format, adding an extra dose of tech to their prescription medication experience.

Have you received an e-script/electronic prescription instead of paper in past 6 months?



What format do you prefer for your prescriptions and/or repeats?



Telehealth

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

57%	43%
Yes	No

How satisfied were you with the telehealth experience?

77%	12%	11%
Satisfied	Dissatisfied	Neutral

Top reasons for telehealth rating

Satisfied

- Convenient
- Good communication from healthcare provider
- Easy to book appointment
- Received good medical advice

Dissatisfied

- Appointment start time was delayed
- Condition/concern was not resolved
- Poor communication from healthcare provider
- Poor quality of care

People's take on telehealth

Overall, telehealth usage remains fairly consistent with June report, moving from 56% to 57%. Looking deeper into usage, more women (63%) than men 50%) are using telehealth and states with highest usage are VIC (64%), ACT (61%) and SA (60%). Looking at broader geography, usage in metro areas (57%) was higher than regional/remote areas (54%).

Whilst the popularity of video-centric platforms like YouTube and TikTok suggest people love videos, when it comes to telehealth, only 16% said they'd rather have a video consult than a phone consult.

GP consult (40%), repeat prescriptions (21%) and specialist consult (10%) are top reasons for a telehealth consultation with 48% of people citing convenience as why they chose telehealth vs an in-person appointment at a clinic. Other reasons for choosing telehealth included current illness prevented going to clinic (26%), didn't want to leave home (21%) and long wait time to see regular GP (19%).

Rebate Access

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. Have the rebate conditions prevented you from using telehealth?

Age breakdowns	14% Yes	69% No	18% Don't know
18-34	24%	59%	17%
35-49	16%	64%	20%
50-64	10%	71%	19%
65+	4%	81%	15%

People aged 18-34 continue to be most affected by rebate conditions.

Telehealth use

What was the primary reason for your telehealth consult?

40%	GP consult
21%	Repeat prescriptions
10%	Specialist consult
7%	Cold & flu
7%	Other
6%	Mental health
7%	Medical certificate
3%	Referral

Why did you choose telehealth?

48%	Convenience
26%	Current illness didn't allow me to go to clinic
21%	Didn't want to leave home
19%	Appointment wait time too long with regular GP
15%	Something else
9%	I'm in rural/remote/regional location
6%	Wanted after hours appt

Was your telehealth appointment via video or phone?

13% Video

87% Phone

- People aged 18-34 were highest users of video at 17%
- 16% Regional vs 12% Metro telehealth appointments were by video
- ACT (23%) and NT (31%) had highest video use

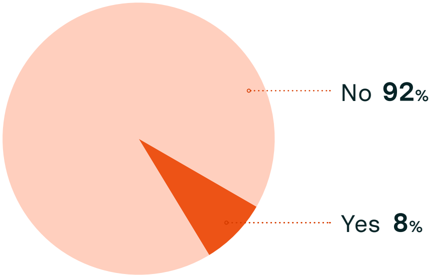
If by phone, would you have preferred a video consult?

16% Yes

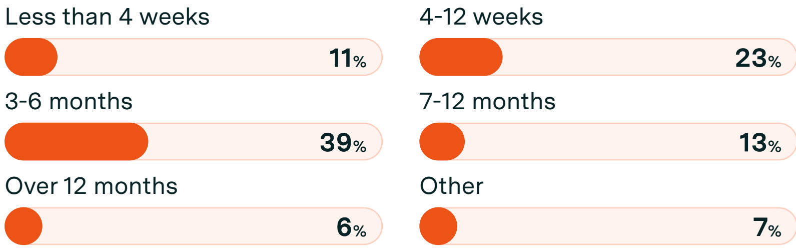
84% No

Closing down COVID-19

Have you had COVID-19 more than once?



How long after your first COVID infection, did you get your second?



How concerned are you that the increase of infectious diseases (e.g. COVID-19, Monkeypox) will lead to the need for more vaccinations?

31% Not concerned

39% Concerned

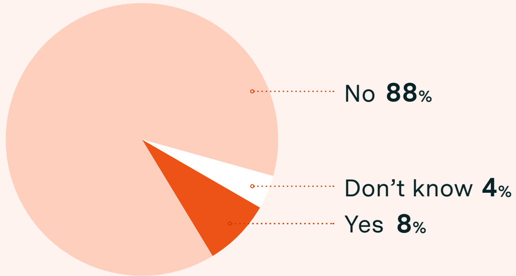
30% Neutral

Globally and at home, COVID concerns are declining. At the 14 September WHO media briefing, Director-General Tedros Adhanom Ghebreyesus' opening remarks included that the end is in sight for COVID-19. In Australia, 14 October marked the end to mandatory COVID isolation.

Before mandatory isolation has ended, only 8% of people said they didn't test or delayed testing to avoid self-isolation during the pandemic. Looking at repeat COVID cases, the survey found that only 8% of adults reported getting COVID more than once.

With Australian COVID vaccination rates at 95.8% for people aged 16+ with 2 doses and 72.2% with 3 doses, how concerned are people with infectious diseases leading to the need for more vaccinations? Overall 39% fall into the concerned category whilst 31% are not concerned and 30% are neutral.

Have you thought you might have COVID, but didn't test or delayed testing so you didn't have to self-isolate?



Tracking healthcare experiences over time

With the launch of the 4th Australian Healthcare Index, the next section shares data trends from across the reports since the initial launch in March of 2021. Key areas from the Health experiences section are covered, looking at Australia's Healthcare Rating, challenges facing Australian Healthcare, NPS scores for GPs, Dentists, Pharmacists and Private Health Insurance as well as Emergency Department use and satisfaction rates and Elective Surgery wait times and satisfaction rates.

Topline review of AHI data trends over time

Australia's Healthcare Rating

March 2021	October 2021	June 2022	November 2022
7.8	7.6↓	7.2↓	7.1↓

GP NPS

March 2021	October 2021	June 2022	November 2022
N/A	50	35↓	34↓

Dentist NPS

March 2021	October 2021	June 2022	November 2022
N/A	52	36↓	34↓

Pharmacist NPS

March 2021	October 2021	June 2022	November 2022
N/A	N/A	N/A	40

Private Health Insurance NPS

March 2021	October 2021	June 2022	November 2022
N/A	2	-11↓	-9↑

Patients' View: Top Challenges for Australian Healthcare

March 2021

N/A

October 2021

- PHI Costs
- COVID-19 vaccination program
- ED waiting room times

June 2022

- PHI Costs
- ED waiting room times
- Access to mental healthcare

November 2022

- GP, nurse & healthcare worker shortage
- ED waiting room times
- Increasing costs to see GP/doctor

Emergency Department Visits

Percentage of respondents going to ED in past 6 months

March 2021	October 2021	June 2022	November 2022
26%	24%	33%	37%

Elective Surgery

Percentage of respondents waiting to have surgery in either public or private hospital

March 2021	October 2021	June 2022	November 2022
10%	8%	11%	12%

Percentage of respondents who had surgery in either a public or private hospital in past 6 months

March 2021	October 2021	June 2022	November 2022
N/A	11%	10%	10%

Topline review of AHI data trends over time

Public Emergency Department

How people rated their experience

	March 2021	October 2021	June 2022	November 2022
Satisfied	69%	67% ↓	54% ↓	50% ↓
Dissatisfied	26%	27% ↑	38% ↑	41% ↑
Neutral	5%	6% ↑	9% ↑	10% ↑

Private Emergency Department

How people rated their experience

	March 2021	October 2021	June 2022	November 2022
Satisfied	86%	79% ↓	72% ↓	76% ↑
Dissatisfied	11%	18% ↑	21% ↑	16% ↓
Neutral	3%	3%	7% ↑	8% ↑

Public Hospital Elective Surgery

How people rated their experience

	March 2021	October 2021	June 2022	November 2022
Satisfied	76%	74% ↓	81% ↑	77% ↓
Dissatisfied	19%	22% ↑	13% ↓	17% ↑
Neutral	5%	4% ↓	6% ↑	6%

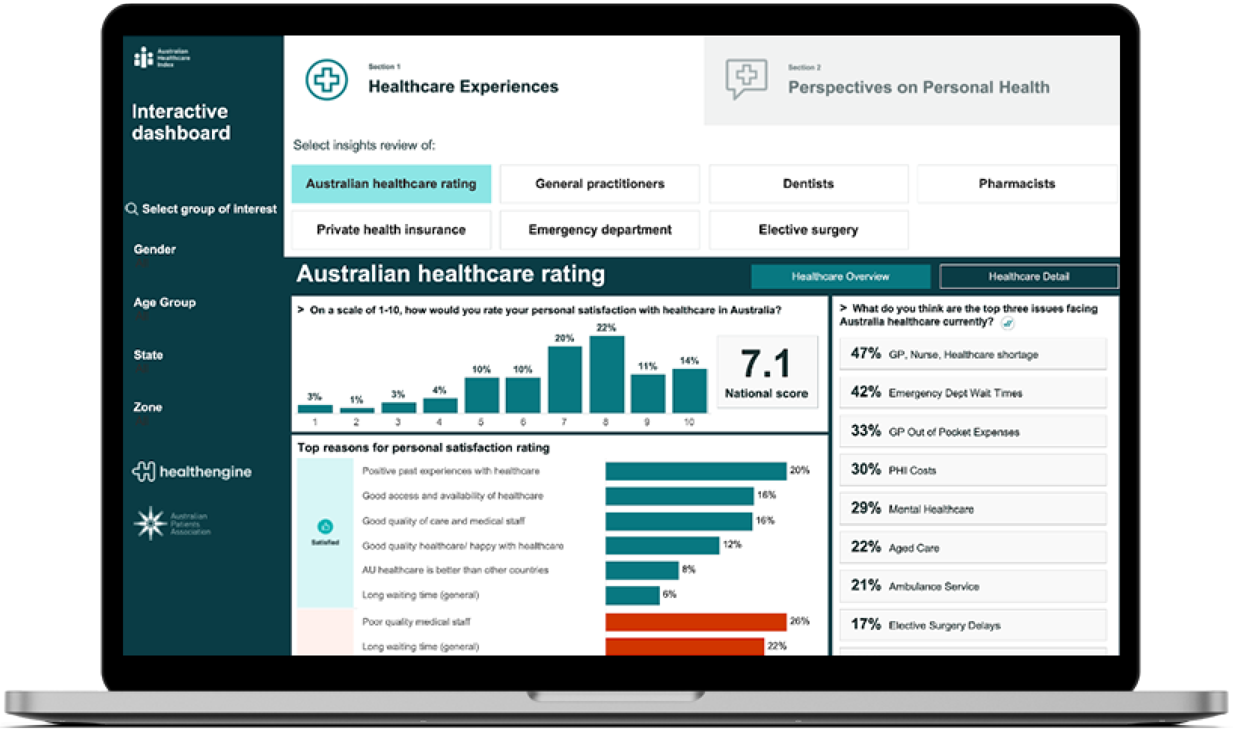
Private Hospital Elective Surgery

How people rated their experience

	March 2021	October 2021	June 2022	November 2022
Satisfied	87%	93% ↑	90% ↓	92% ↑
Dissatisfied	9%	7% ↓	7%	5% ↓
Neutral	4%	0% ↓	2% ↑	3% ↑

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 at AustralianHealthcareIndex.com.au. Additional demographic breakdowns are available across state, age gender and region as well. It's a great resource to view survey topics and focus on details of most interest to you or your organisation.

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Date of publication
November 2022

Closing

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

We hope the latest report provides helpful and informative insights on the patient journey through the public and private healthcare systems. It also can serve as a catalyst for conversation and exploration of opportunities to strengthen commitments to patient-centred care. Together, our collective efforts contribute to having one of the leading healthcare systems in the world.

If Healthengine and the APA, can support your organisation or to talk further about the report, 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 make healthcare more affordable, convenient and certain.

Dr Marcus Tan
Healthengine CEO & Founder

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About us

healthengine

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 8,500 Australian healthcare practices across GP, dental, allied health, 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.

Australian Patients Association

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.

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Sharing the patient voice

Healthengine and the Australian Patients Association

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Date of publication
November 2022