



Telehealth Patient Survey

Australian patients share their views
on telehealth during COVID-19

2020



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CEO Statement

Dear Colleagues,

We were days away from releasing our annual white paper on technology trends in General Practice before COVID-19 erupted onto the scene. The Federal Government announced Medicare rebate items for telehealth appointments, and suddenly, our 2020 Patient Survey needed a fresh update.

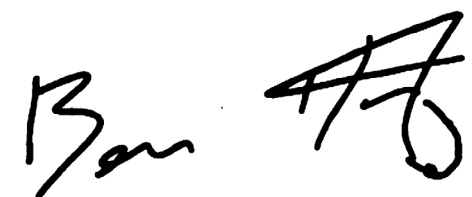
While Covid is primarily a story of tragedy, it is also a story of progress. Arguably, General Practice in Australia has transformed more in the last 6 weeks than it has in the last 6 years. So much has changed: triage processes, waiting rooms, billing processes, the list goes on...

This report is our attempt to understand the early experiences of telehealth from the patient perspective. In particular, we sought to reveal the answers to five important questions:

- How will COVID-19 impact patient attendance?
- Do patients have a preference for video or phone?
- What types of appointments are better served by telehealth?
- Are patients willing to pay for telehealth?
- Are patients likely to continue to use telehealth beyond COVID-19?

I hope this report sheds some light on how practices can continue to deliver a great patient experience and run a successful practice under these very trying circumstances.

All the best,

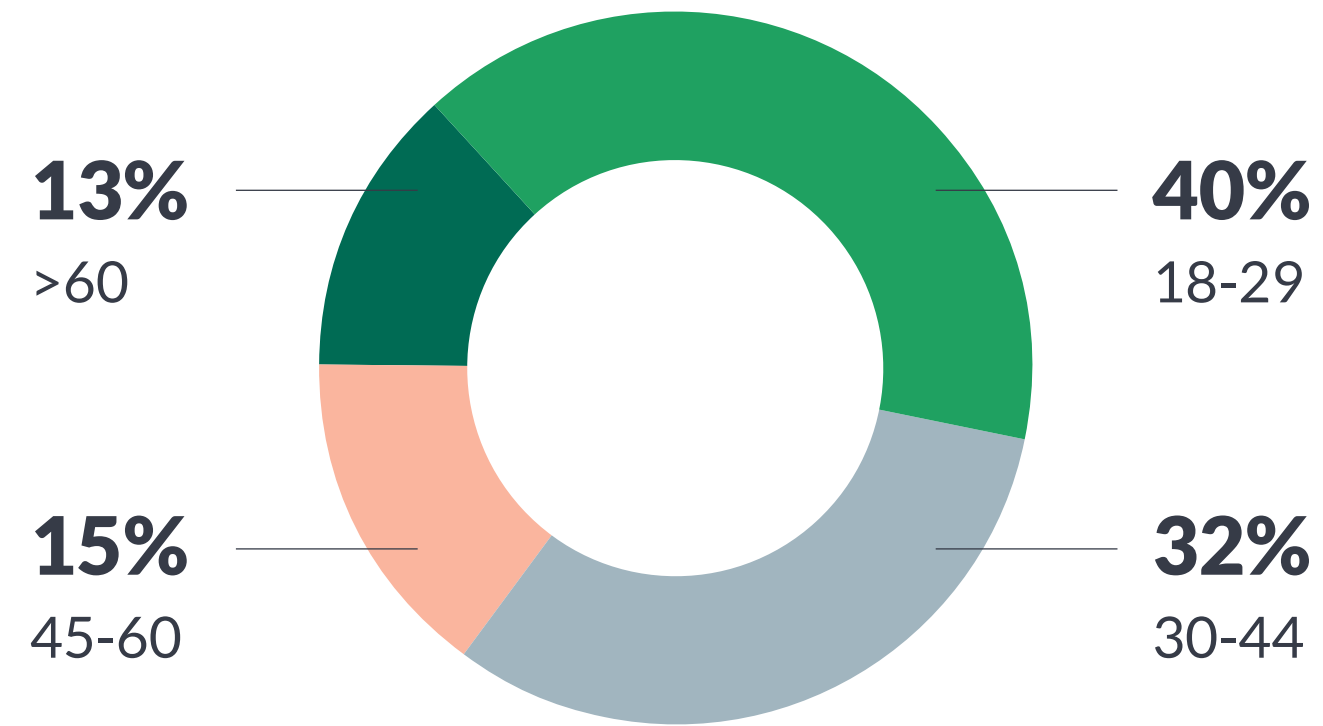


Dr. Ben Hurst
CEO HotDoc

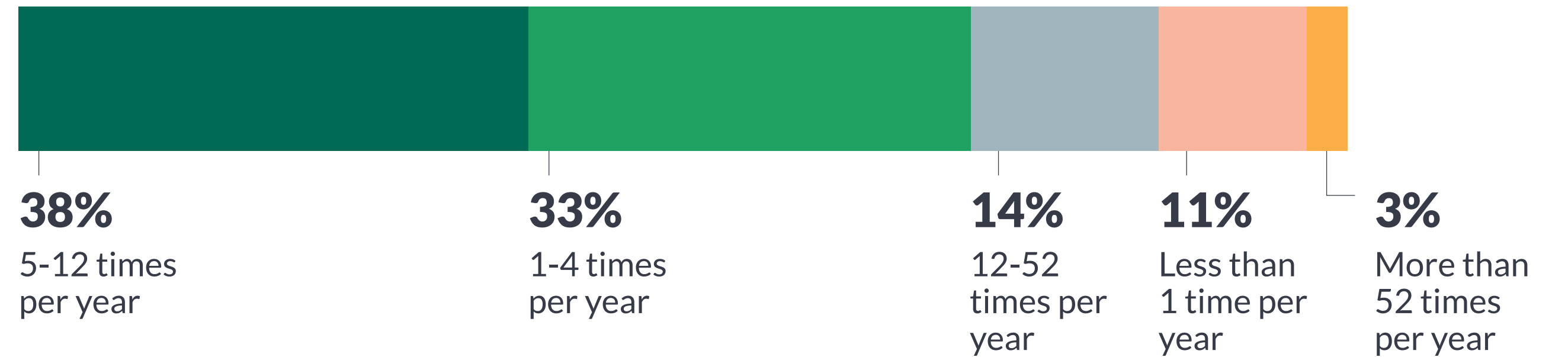


About the Respondents

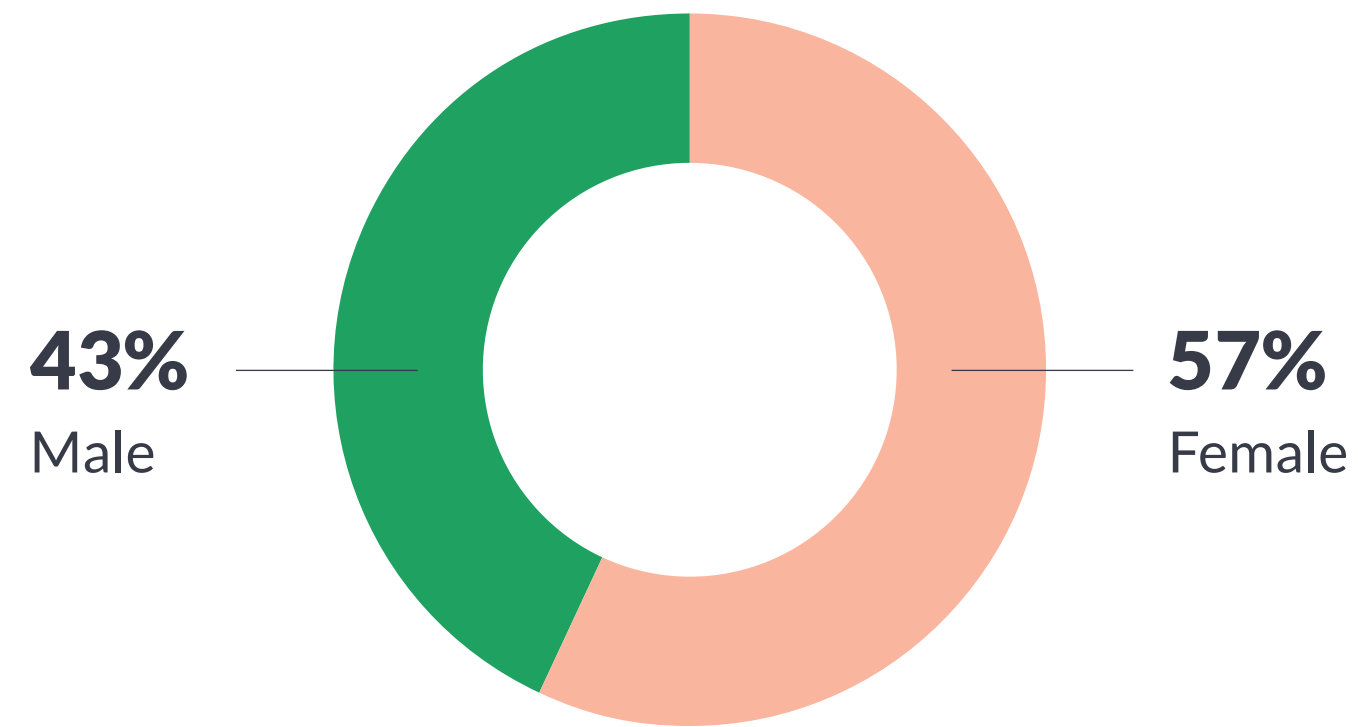
Age



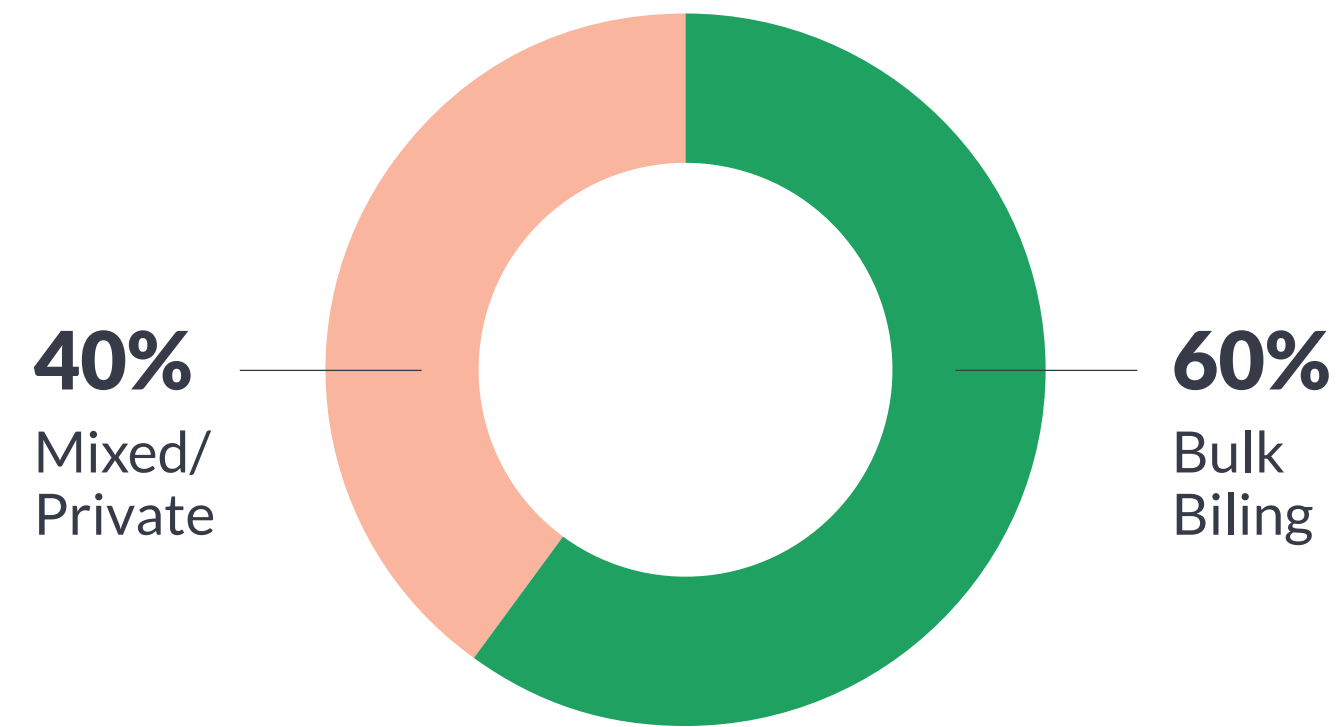
How often do you attend a GP practice?



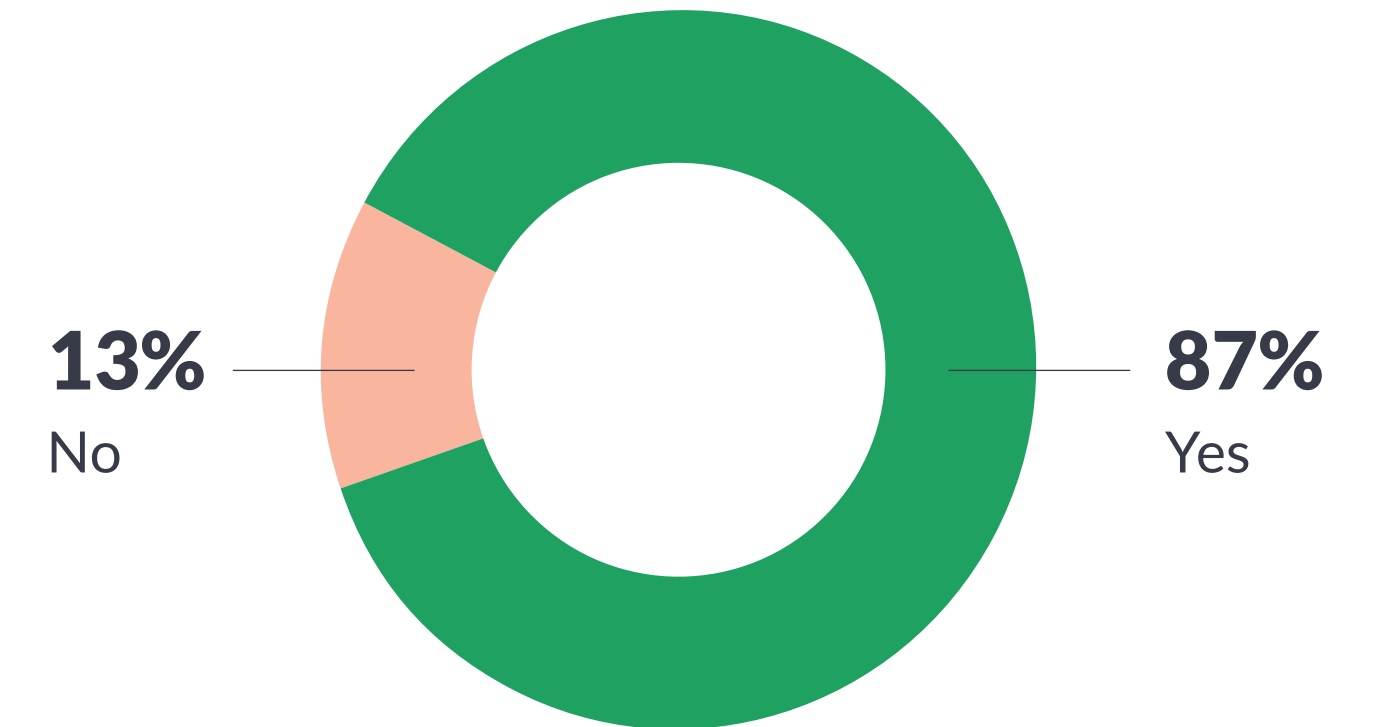
Gender



What type of practice do you typically attend?



Do you have a regular GP practice that you have visited 3 times in a row?



About the Survey

On April 21, 2020, HotDoc surveyed 347 Australians over the age of 18 to get a better understanding of how patients have adapted their habits and preferences regarding GP attendance during COVID-19. We placed a particular focus on telehealth uptake.

Focus

The purpose of this report is to look at how Australians have adjusted their GP appointment attendance preferences in the wake of COVID-19.

To make it easy, we've split the analysis into several sections. The first section looks at how different age cohorts have adjusted to COVID-19. The second splits the data by the frequency of GP visits. The third section focuses on the type of practice patients typically attend to see how this affects responses. The next two sections look at patients' telehealth uptake and preferences. The report concludes with our recommendations based on the findings.



Key Findings

People are less likely to see the GP during the COVID-19 pandemic

Almost 1-in-2 people say they are less likely to see their GP during the COVID-19 pandemic. Young patients (18-29 years) are the most likely to avoid GP appointments during the pandemic.

Awareness of telehealth is low

There has been some early uptake of telehealth, with 1-in-4 patients (25%) having had a telehealth consultation in the past two months. But 42% of patients still didn't know or weren't sure that their GP offered telehealth—40% of patients didn't know that rebates were available for telehealth consultations.

Patients younger than 45 are much more likely to use telehealth

Almost 1-in-3 patients aged 18-29 (29%) have had a telehealth appointment in the last two months. This is closer to 1-in-5 patients over 45 years old.

More than 2-in-5 patients younger than 45 would prefer telehealth to in-person appointments when the COVID-19 restrictions are lifted. Only 1-in-5 patients over the age of 60 would prefer telehealth to in-person appointments when the restrictions are lifted.

Patients preference for telehealth depends on the type of appointment

Patients are most in favour of telehealth consultations for appointments related to results follow-ups and repeat script/referrals. For consultations with a new doctor, skin checks, and sick children, patients prefer in-person appointments.

Patients who have had a telehealth appointment are much more likely to want to continue using telehealth and are happy to pay privately

Patients who have had a telehealth appointment in the last 2 months are more likely to agree that their last in-person appointment could have been done effectively online (68% compared to 48% for patients who haven't had a telehealth appointment in the last 2 months).

Patients who have had a telehealth appointment in the last 2 months are much more likely to be happy to pay privately for a phone or video appointment (47% and 48%, respectively) compared to patients who have not had a recent telehealth appointment (27% and 31%, respectively).

There are some common concerns patients have about telehealth

Around 1-in-3 patients (34%) say they have concerns with telehealth. The most common issues voiced were:

- Internet issues
- Need for physical examination (e.g. taking blood pressure)
- Logistics behind getting scripts to pharmacies
- Communication
- Privacy issues
- Fair pricing

Telehealth will play an important role in the patient experience after the COVID-19 pandemic

More than one third of patients (37%) say they would prefer telehealth over in-person consultations once the pandemic restrictions are lifted.

Younger patients are more likely to use, and are happier to pay for, telehealth consultations

The data shows that younger patients (less than 45 years old) are happier to use telehealth and to keep using telehealth once the COVID-19 restrictions are lifted compared to patients aged 45 years and over. This trend likely relates to the types of consultations that are common to each age group and younger patients' increased comfort with technology.

Analysis

People younger than 45 are much less likely to see their GP during the pandemic as compared to people who are 45 and over. This is most pronounced in the youngest group (18-29 years) who are 57% less likely to see their GP, whereas patients over 60 are only 27% less likely [Figure 1].

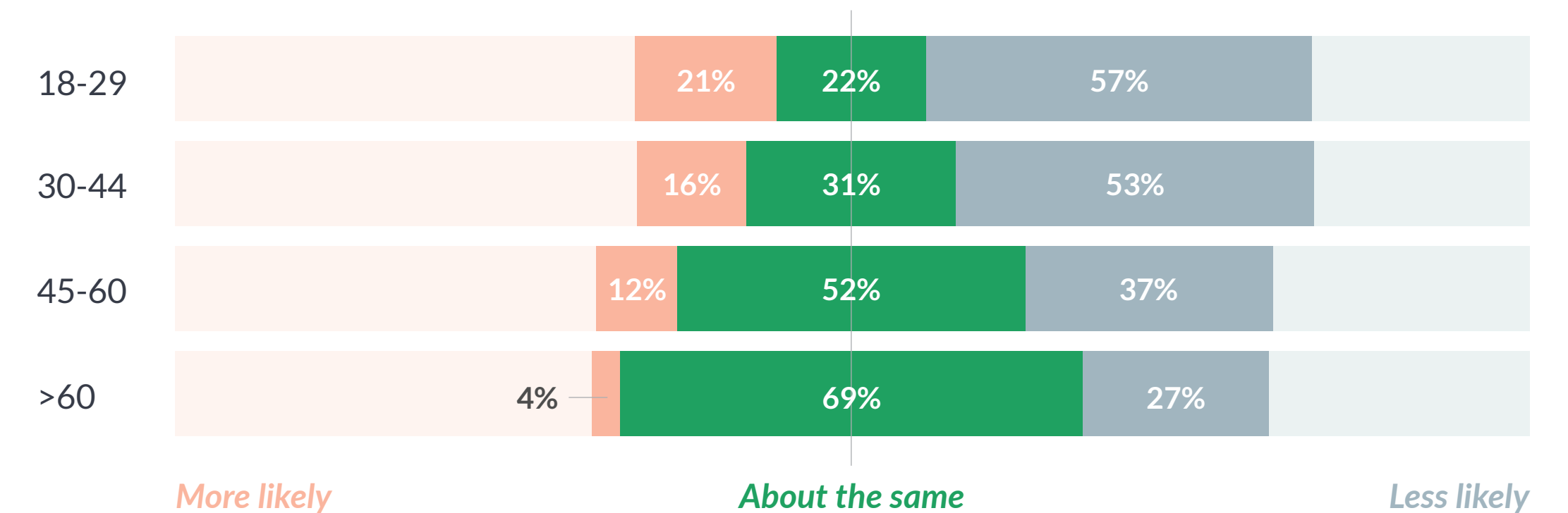
Almost 1-in-3 patients aged 18-29 (29%) have had a telehealth appointment in the last two months, this is closer to 1-in-5 for patients aged over 45 [Figure 2].

Only 18% of young patients (18-29 years) don't think their last in-person GP appointment could have been done as

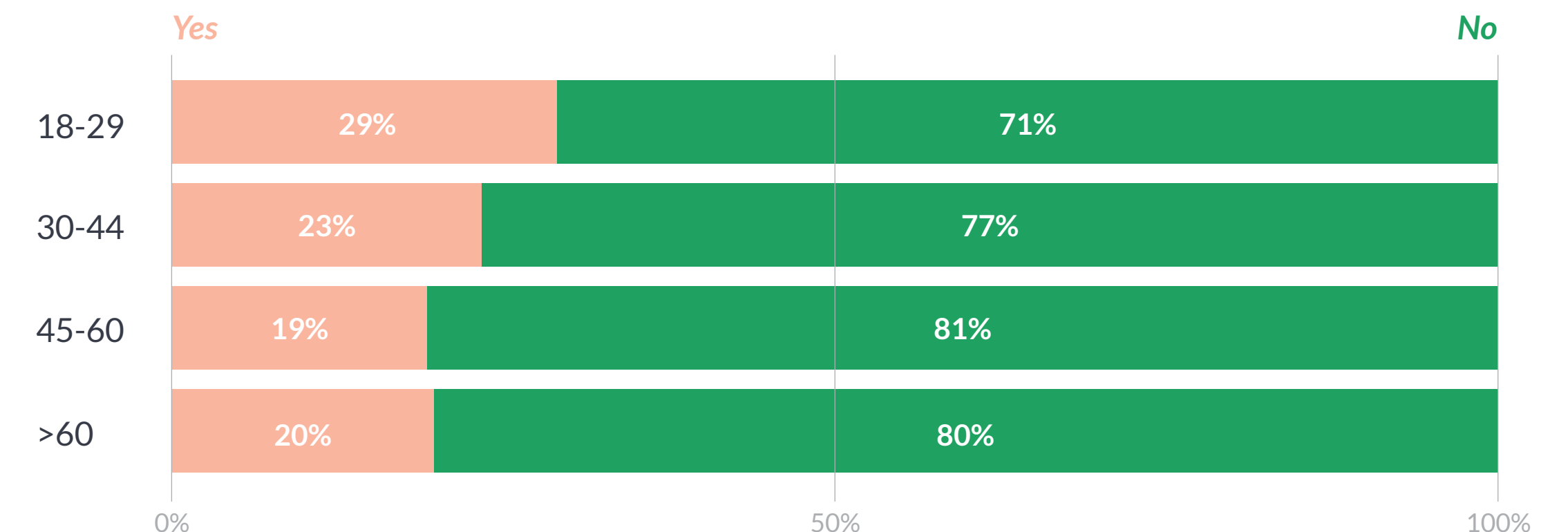
effectively via telehealth. 51% of patients over 60 disagree that telehealth would have been an effective substitute for their last in-person GP appointment [Figure 3].

The gap between preference for telehealth and in-person reduces with age. People over 60 would much prefer in-person GP appointments over telehealth (80% versus 11%, respectively). Young patients (18-29 years) still prefer in-person to telehealth (46% versus 36%, respectively) [Figure 4].

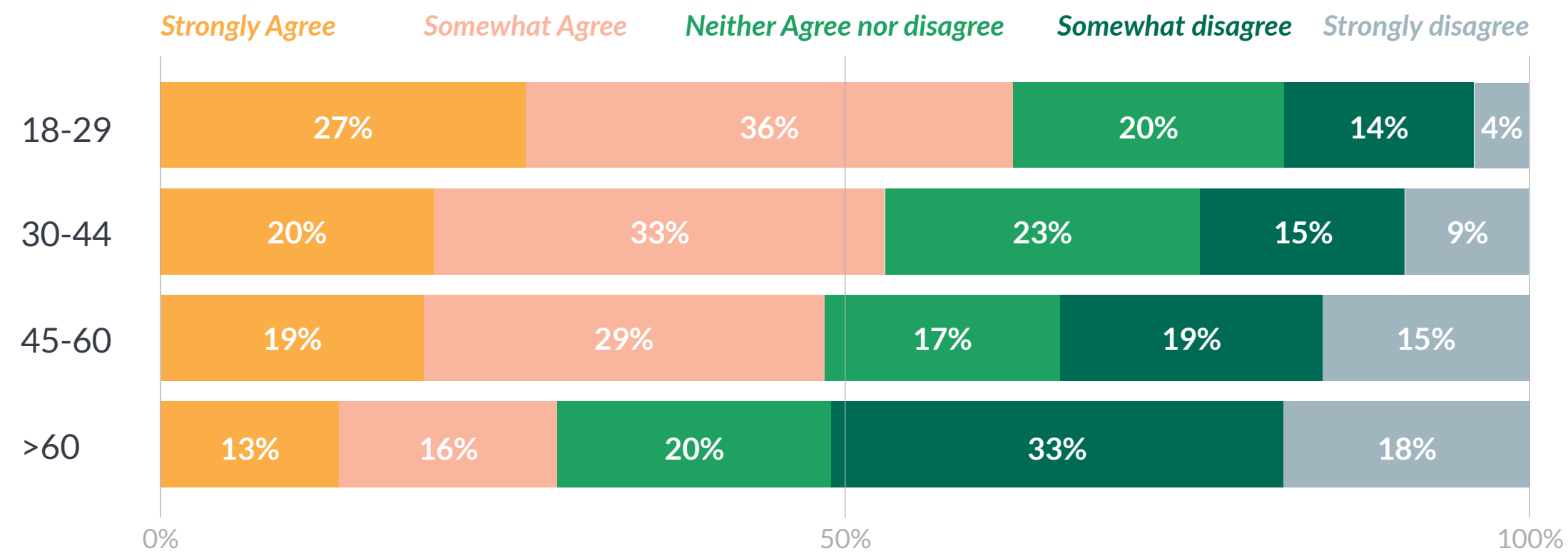
[Figure 1] Are you more or less likely to see a GP during the current COVID-19 situation?



[Figure 2] Have you had a telehealth appointment in the last 2 months?



[Figure 3] Thinking about the last in-person GP appointment you had, do you think it could have been done as effectively via telehealth (video or phone appointment)?

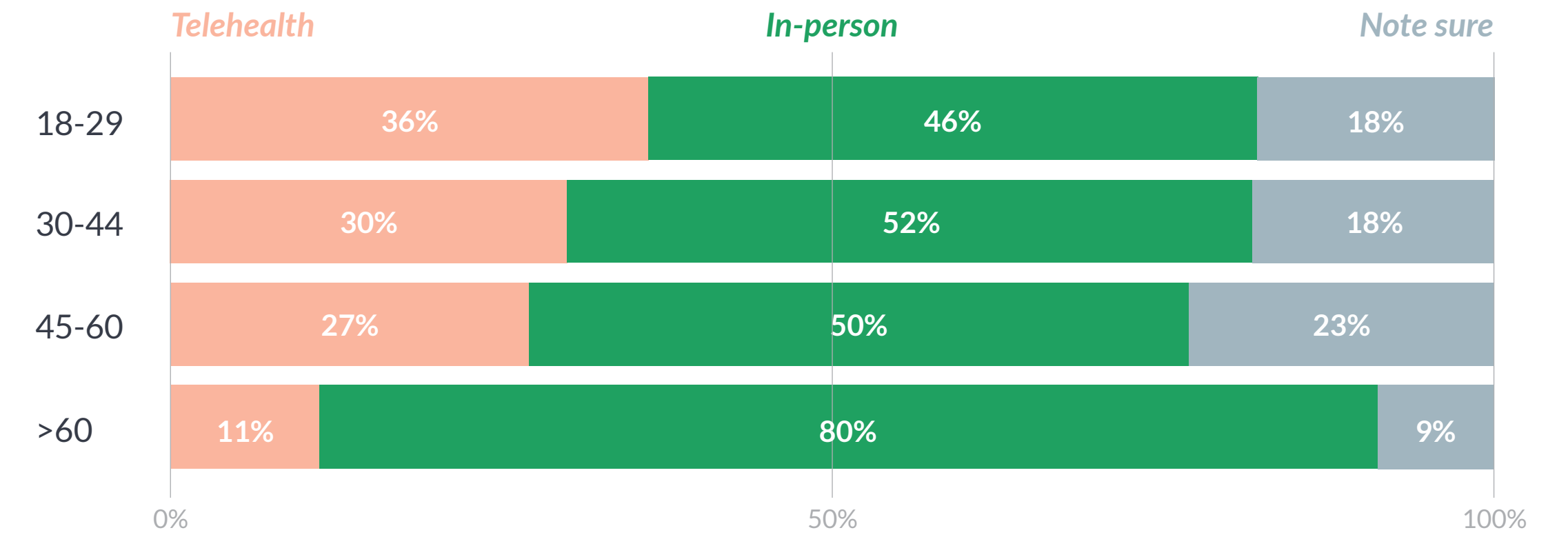


Patients 45 years and over have a preference for telehealth to be delivered by phone rather than video. Patients younger than 45 have no obvious preference for phone or video [Figure 5].

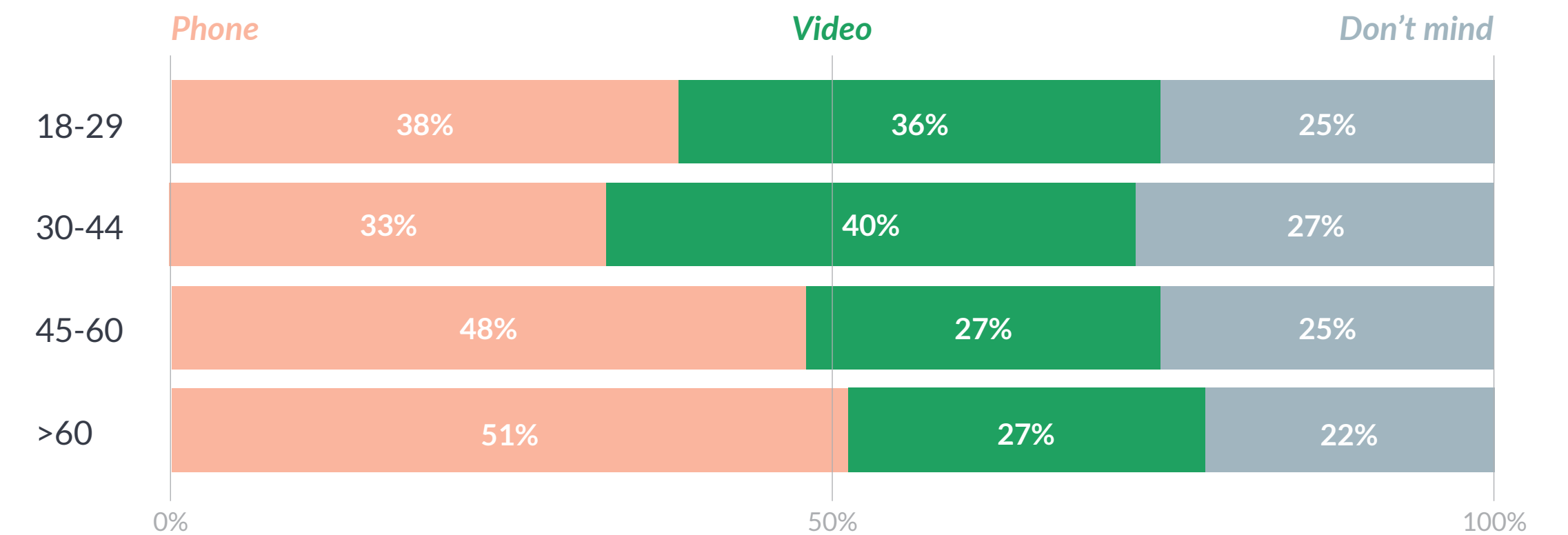
Less than 1-in-3 patients aged 30 years and over are happy to pay privately for a telehealth appointment delivered over the phone. Comparatively more younger people (18-29 years) are happy to pay privately for phone consultations (41%). This is similar for telehealth delivered via video [Figure 6,7].

Patients younger than 45 are much more willing to pay in advance of the appointment. All patients would prefer to pay over-the-phone with a receptionist after the appointment. This preference is less pronounced in younger patients [Figure 8].

[Figure 4] Would you generally prefer to have a telehealth appointment or an in-person appointment if you had the choice?

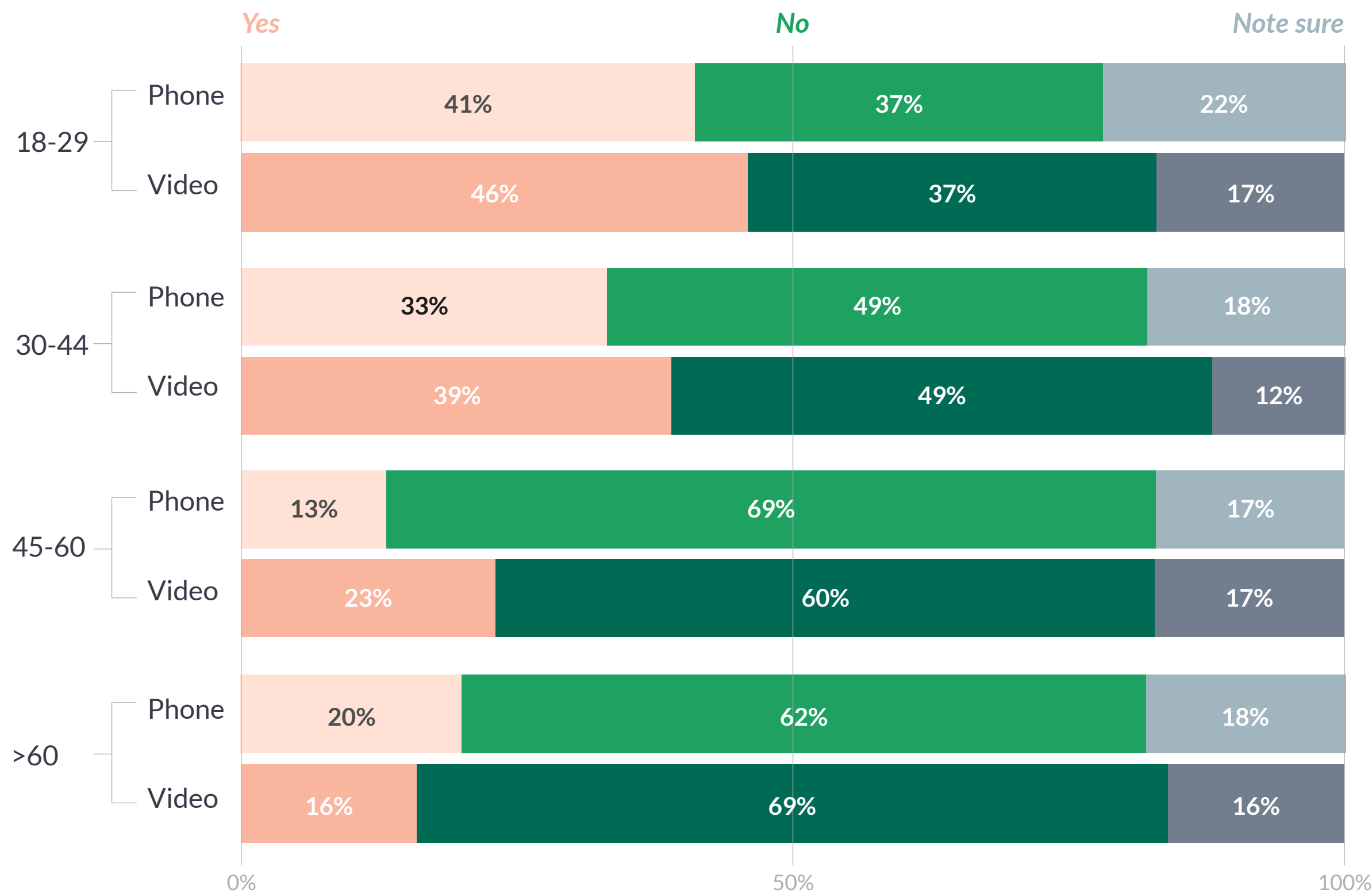


[Figure 5] If you had a telehealth appointment, would you prefer to have it by video or phone?

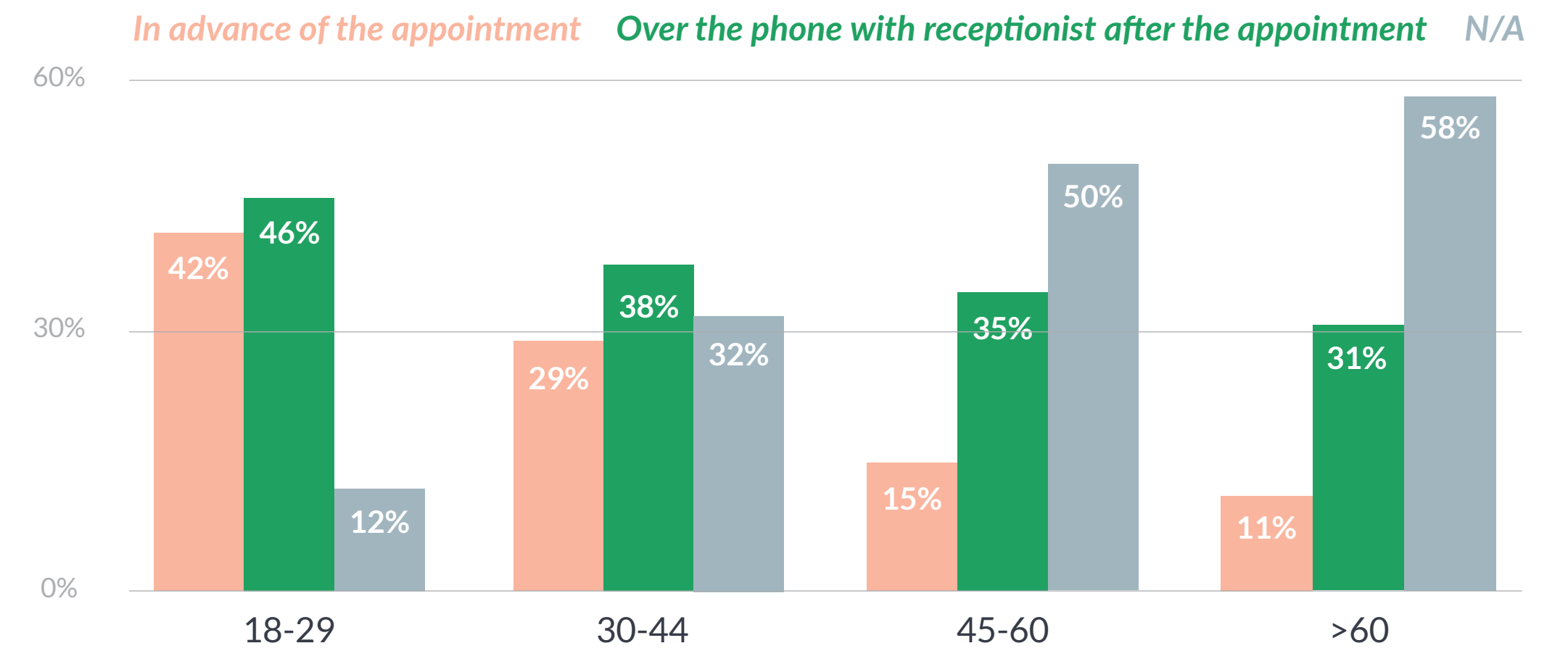


More than 2-in-5 patients younger than 45 would prefer telehealth to in-person appointments when the COVID-19 restrictions are lifted. Only 1-in-5 patients over the age of 60 would prefer telehealth to in-person appointments when the restrictions are lifted.

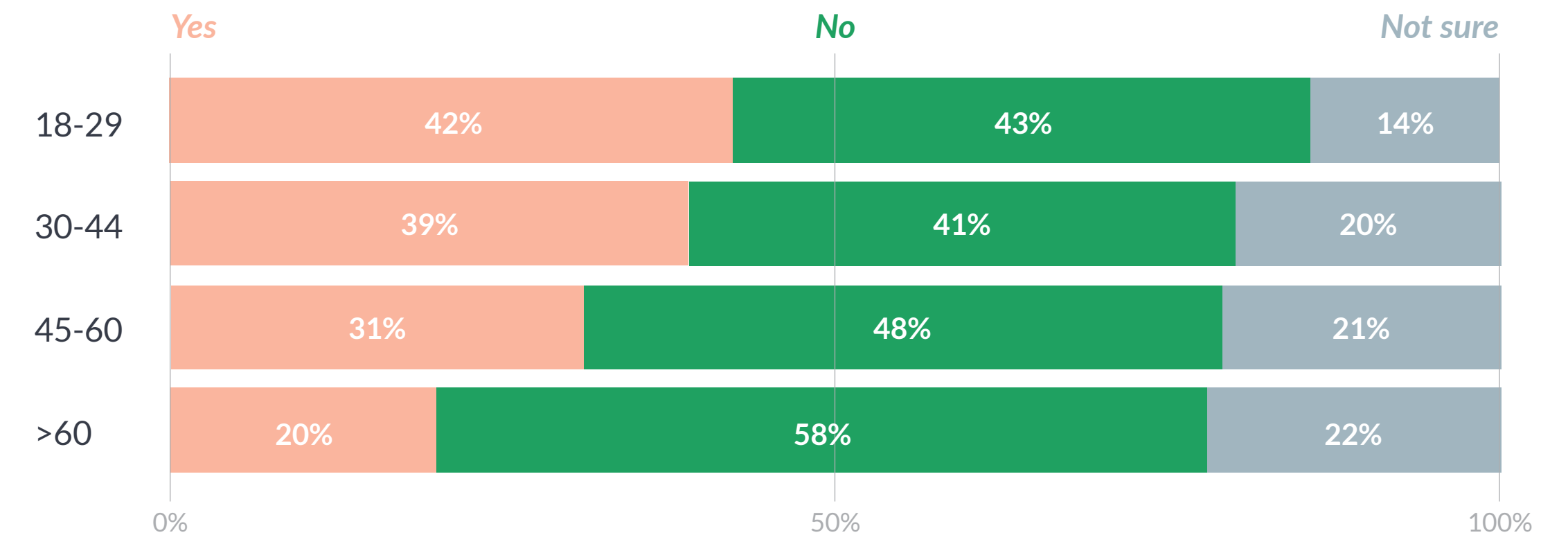
[Figure 6,7] Are you happy to pay privately for a phone appointment with your GP?
For a video appointment?



[Figure 8] Would you prefer to pay securely by card in advance of your appointment or over the phone to a receptionist after the appointment?



[Figure 9] Would you prefer telehealth to an in-person GP appointment if COVID-19 restrictions weren't in place?



Patients who have more frequent GP consultations are more aware of telehealth

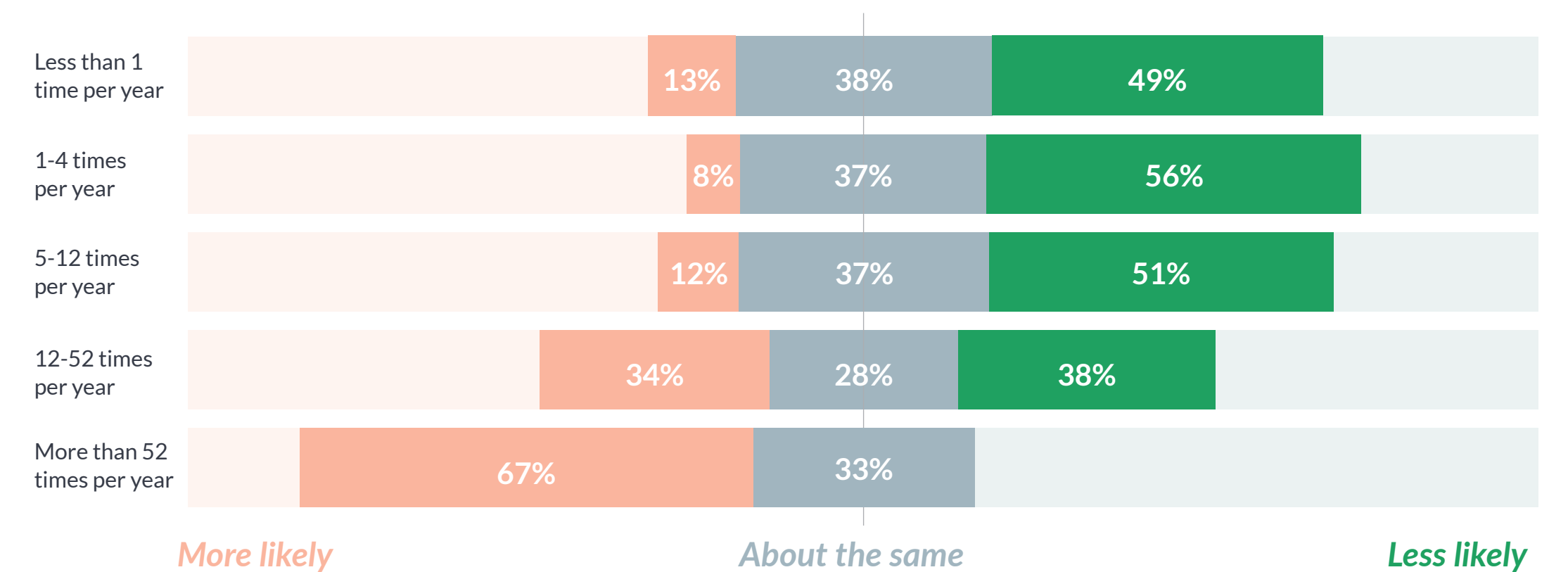
The survey data shows that patients who see their GP more have increased awareness of telehealth and the Medicare rebate. They are also more likely to have had telehealth appointments over the last 2 months.

Analysis

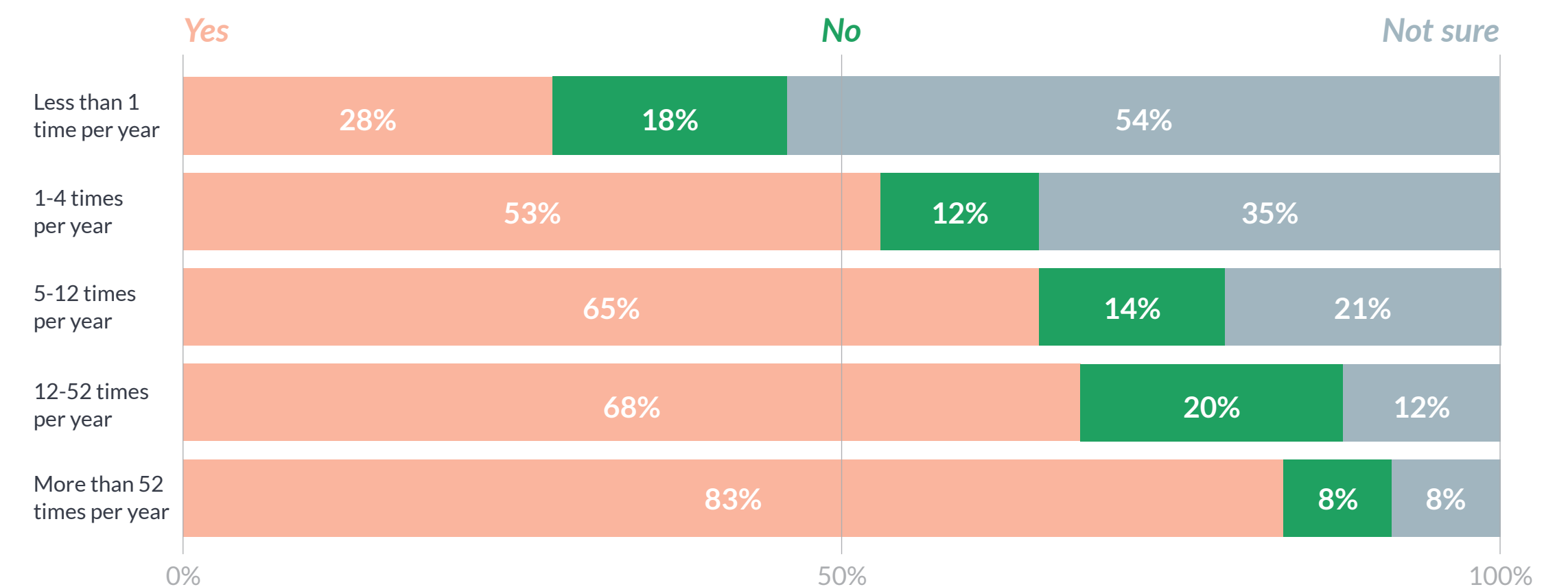
More than 50% of patients who visit the doctor less than 12 times per year are less likely to see their GP during the current COVID-19 situation. This is closer to 1-in-3 for patients who visit the GP more regularly [Figure 10].

Awareness of telehealth increases with the number of annual GP visits. Only 28% of patients who visit the GP less than once a year are aware if their regular GP provides telehealth appointments. In comparison, more than 7-in-10 patients who visit their GP more than once a month are aware if their GP practice provides telehealth. [Figure 11].

[Figure 10] Are you more or less likely to see a GP during the current COVID-19 situation?



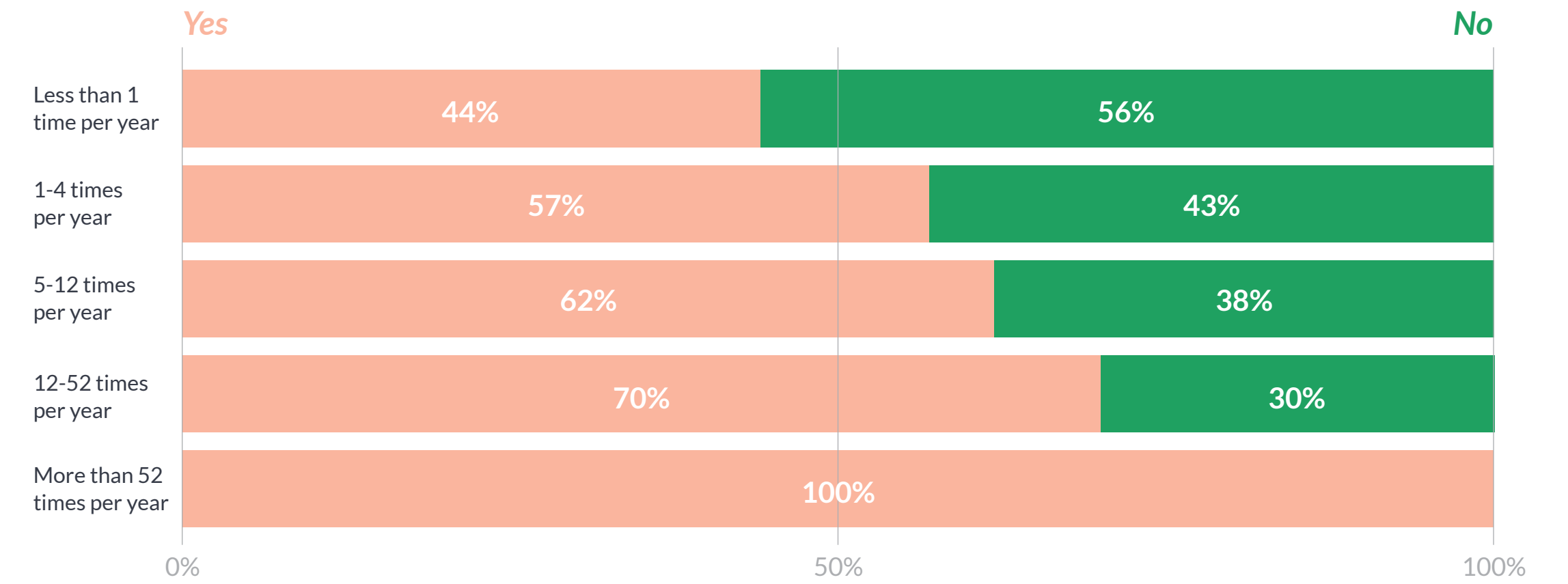
[Figure 11] Are you aware if your regular GP practice provides telehealth appointments?



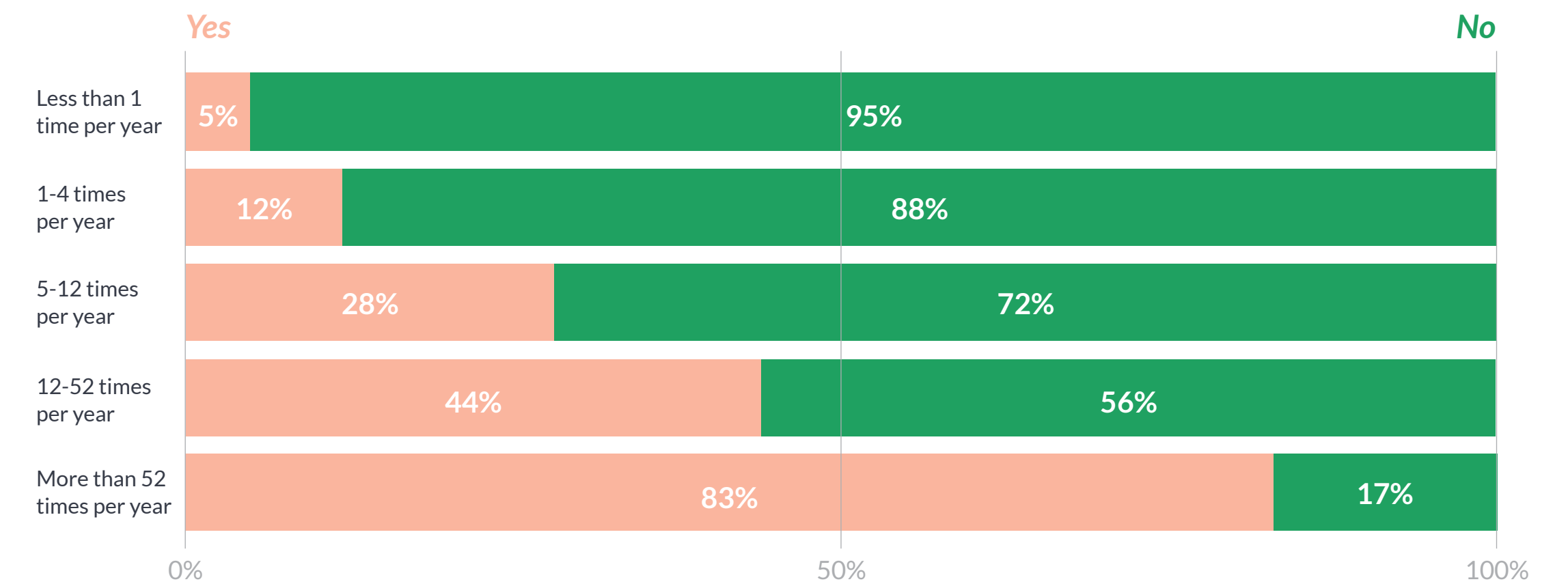
Awareness of the Medicare rebate for telehealth increases with the number of visits to the GP [Figure 12].

Regular patients (those who visit their GP at least monthly) are much more likely to have had a telehealth appointment in the last 2 months [Figure 13].

[Figure 12] Were you aware that you can now get a Medicare rebated telehealth (video or phone) appointment with a GP?



[Figure 13] Have you had a telehealth appointment in the last 2 months?



Patients who attend private/mixed clinics are willing to use and pay for telehealth

Unsurprisingly, the survey results show that patients who attend mixed/private GP clinics compared to bulk billing clinics are happier to pay privately for a telehealth consult.

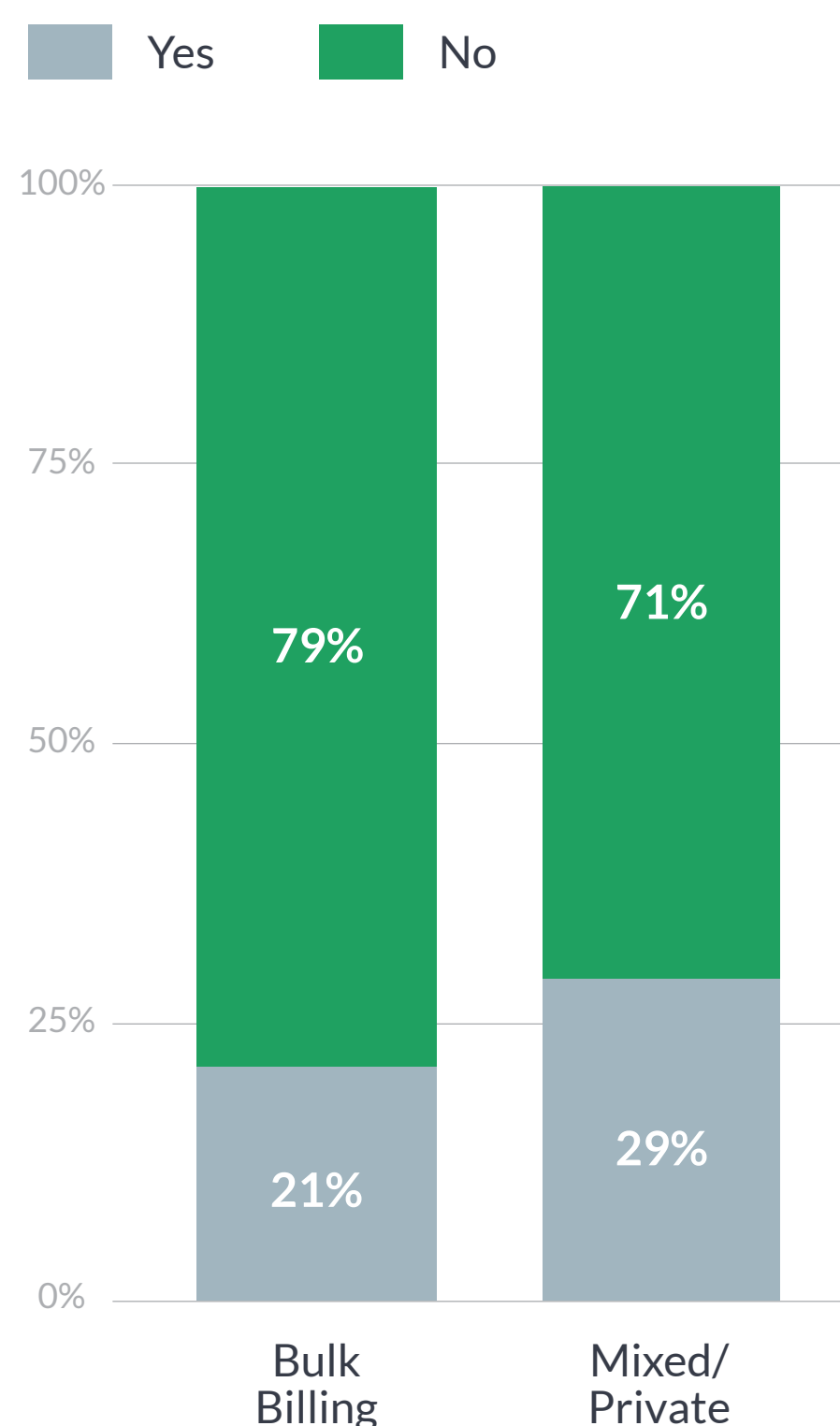
Analysis

Patients at mixed/private clinics are more likely to have had a telehealth appointment compared to patients who attend bulk billing clinics (29% and 21%, respectively) [Figure 14].

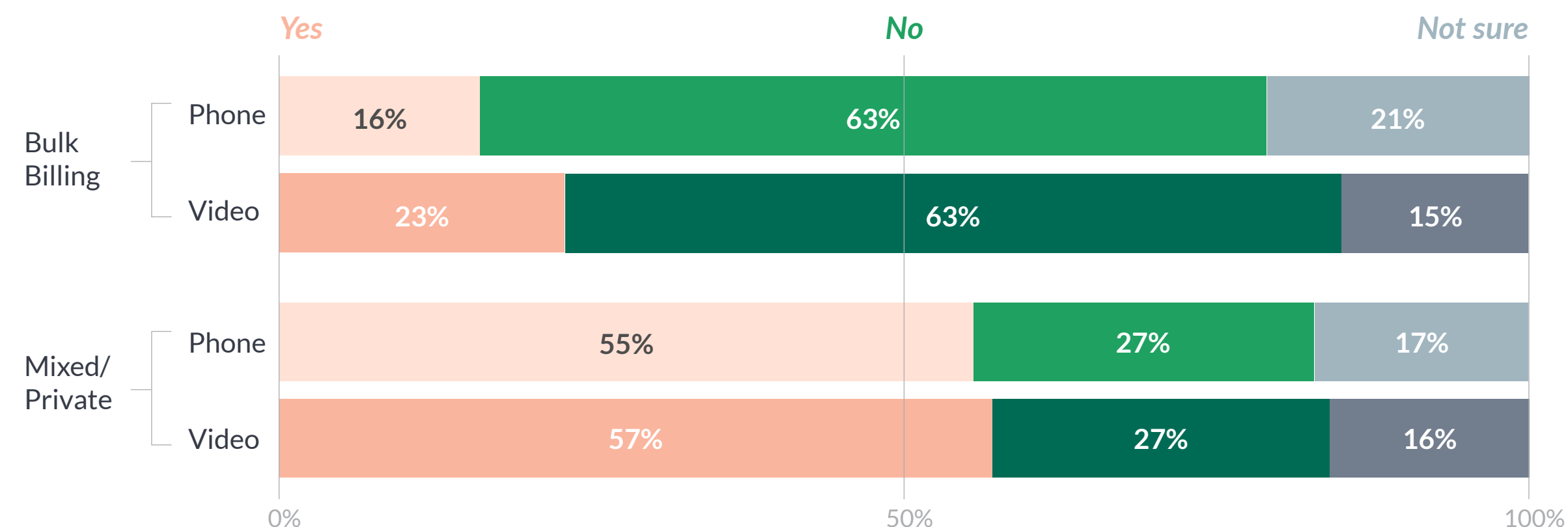
Fifty-five percent of patients who attend mixed/private GP clinics are happy to pay for telehealth over the phone. This increases slightly to 57% for video telehealth appointments [Figure 15, 16].

Almost half (48%) of patients who attend mixed/private GP clinics would prefer telehealth to an in-person GP appointment if COVID-19 restrictions weren't in place. This is much higher than patients who attend bulk billing clinics (29%) [Figure 17].

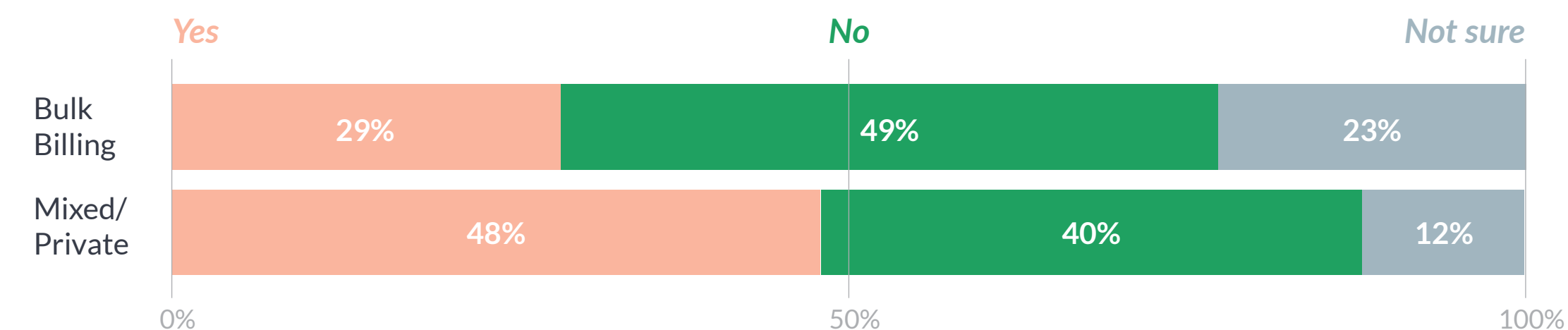
[Figure 14] Have you had a telehealth appointment in the last 2 months?



[Figure 15,16] Are you happy to pay privately for a phone appointment with your GP? For a video appointment?



[Figure 17] Would you prefer telehealth to an in-person GP appointment if COVID-19 restrictions weren't in place?



Patients who have recently had telehealth appointments are keen to continue using it and want to pay upfront

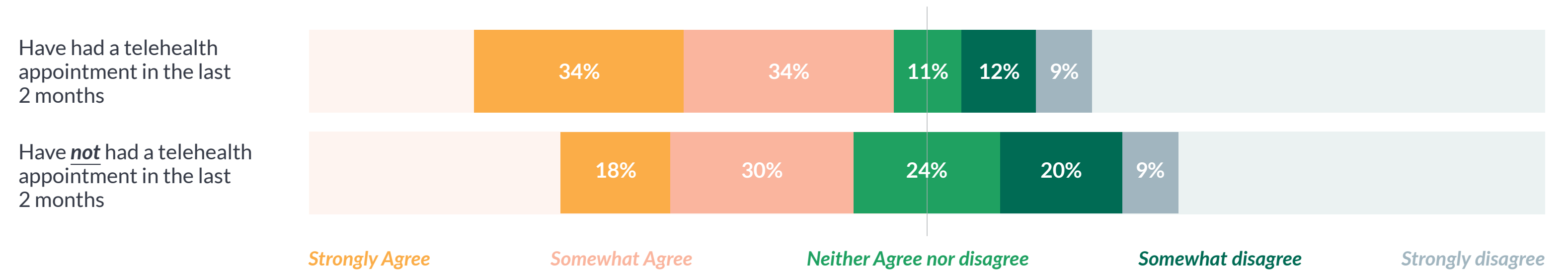
Patients who have had a telehealth appointment in the last 2 months are much more likely to want to continue using it and are generally happy to pay privately for their appointments.

Analysis

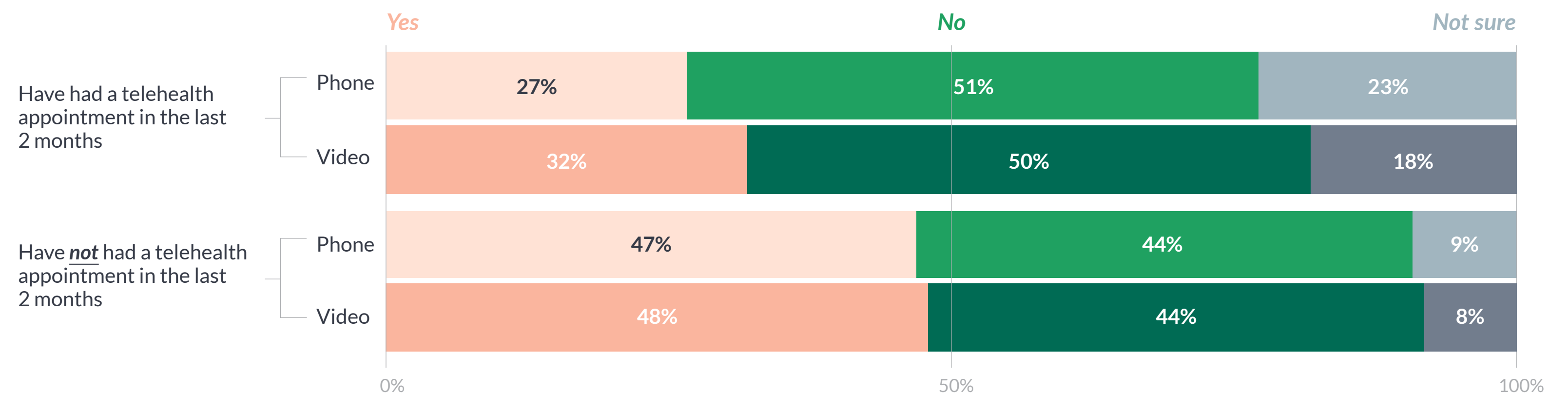
Patients who have had a telehealth appointment in the last 2 months are more likely to agree that their last in-person appointment could have been done effectively online (68% compared to 48% for patients who haven't had a telehealth appointment in the last 2 months) [Figure 18].

Patients who have had a telehealth appointment in the last 2 months are much more likely to be happy to pay privately for a phone or video appointment (47% and 48%, respectively) than patients who have not had a recent telehealth appointment (27% and 31%, respectively) [Figure 19].

[Figure 18] Would you prefer telehealth to an in-person GP appointment if COVID-19 restrictions weren't in place?



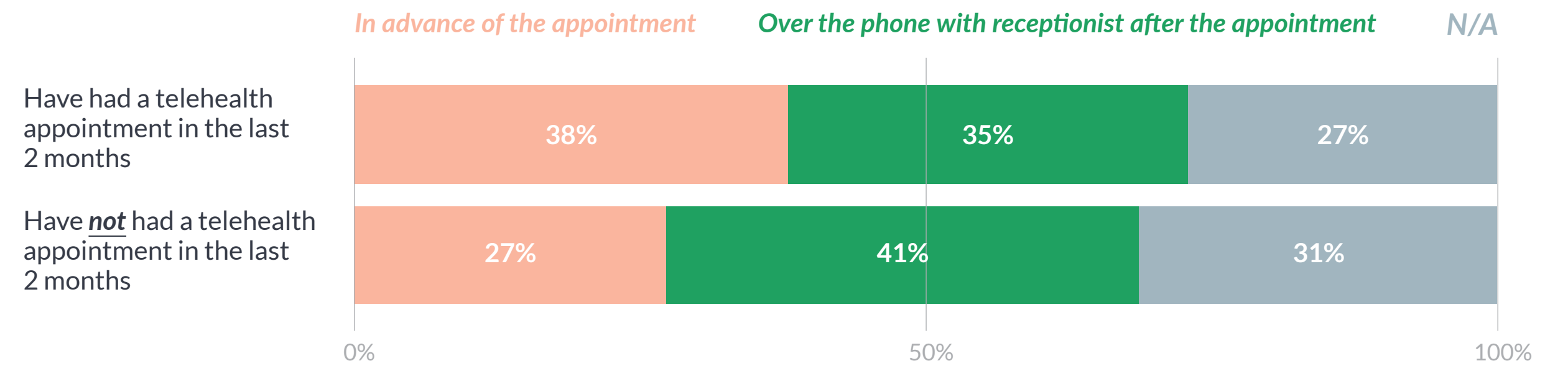
[Figure 19,20] Are you happy to pay privately for phone appointments? For Video appointments?



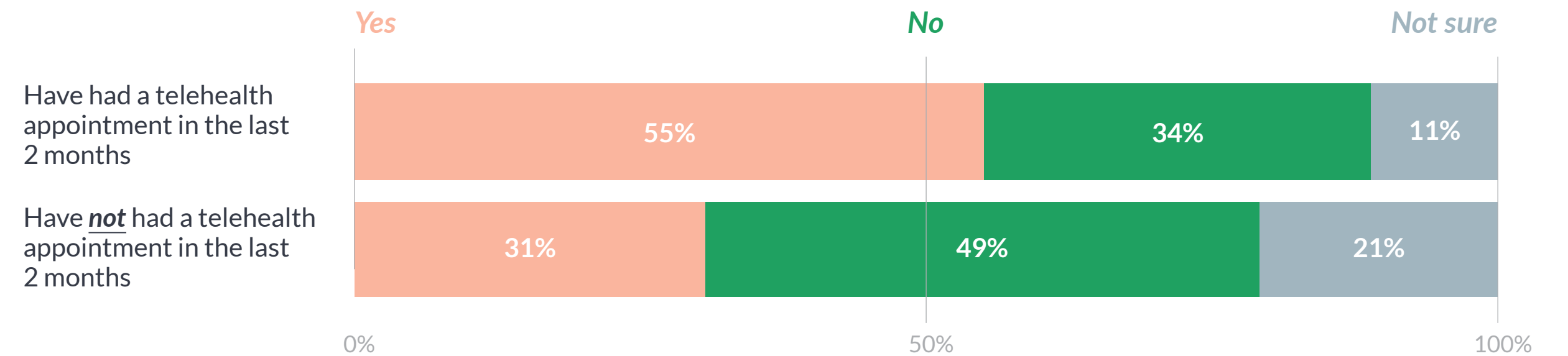
Patients who have had a telehealth appointment in the last 2 months prefer to pay in advance of the appointment rather than over-the-phone with the receptionist after the appointment (38% and 35%, respectively). This is not the case for patients who have not had a telehealth appointment in the last 2 months—41% prefer to pay over-the-phone after the appointment versus 27% who prefer to pay in advance [Figure 21].

Patients who have had a recent telehealth appointment are much more likely to prefer telehealth over in-person when the COVID-19 restrictions are lifted (55% compared to 31% for patients who haven't had a telehealth appointment in the last 2 months) [Figure 22].

[Figure 21] Would you prefer to pay securely by card in advance of your appointment or over the phone to a receptionist after the appointment?



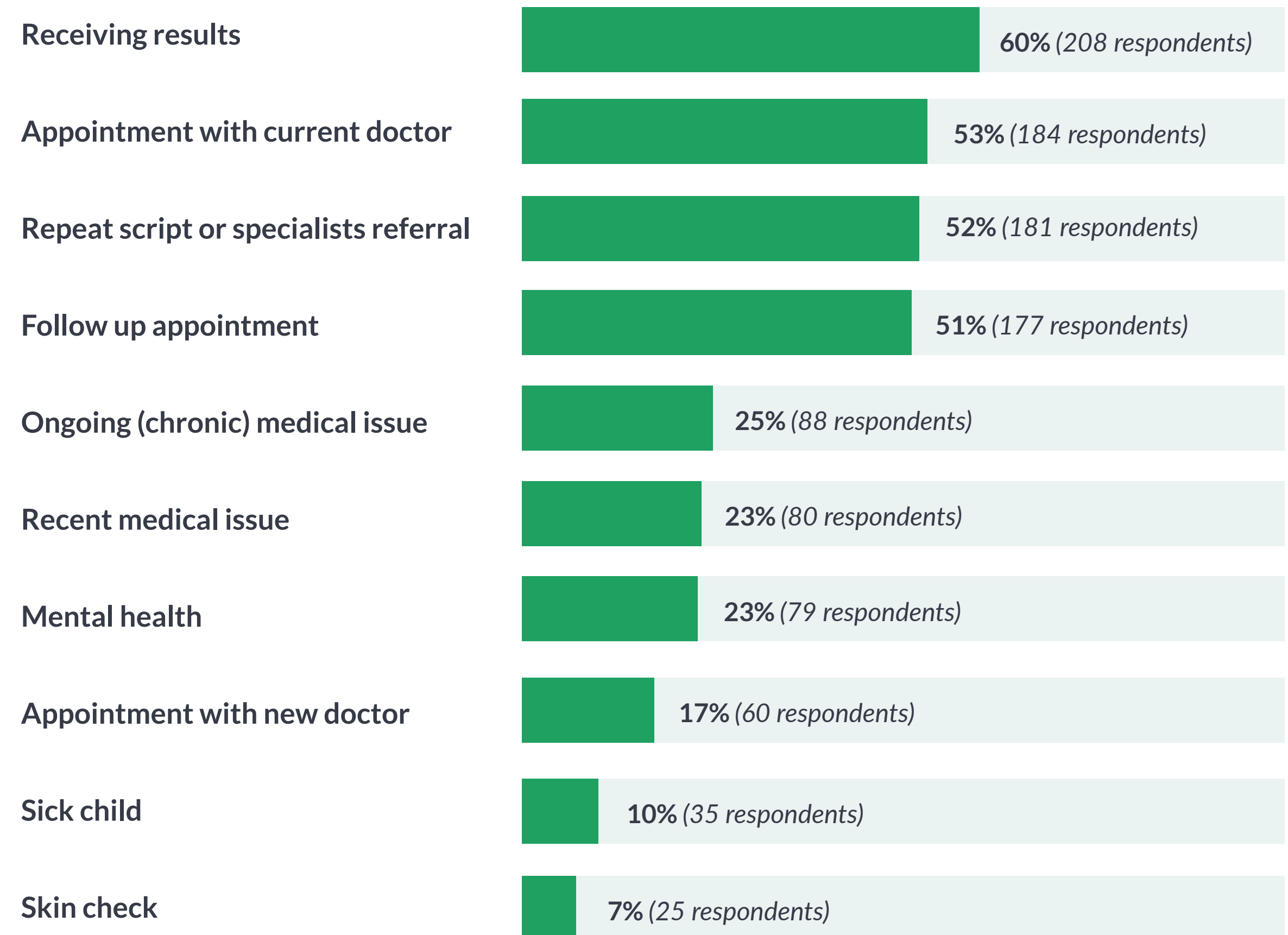
[Figure 22] Would you prefer telehealth to an in-person GP appointment if COVID-19 restrictions weren't in place?



Patients prefer telehealth to in-person appointments for follow-ups, results, scripts and referrals with their current GP

There are 4 types of appointments that more than half of patients prefer telehealth to in-person appointments: when receiving results (60%), when seeing their current doctor (53%), when receiving a repeat script or specialist referral (52%), and for follow-up appointments (51%).

[Figure 23] Which types of appointments you would prefer via telehealth as compared to in-person? (multiple answers per respondent possible)



Patients do have a few concerns about telehealth

Around 1-in-3 patients (34%) say they have concerns with telehealth.

The most common issues voiced were:

Internet issues

Need for physical examination (e.g. taking blood pressure)

Logistics behind getting scripts to pharmacies

Communication challenges

Privacy issues

Fair pricing

“ Communication was the major problem. There was a lot of dead air and misunderstanding. Because we were not meeting in person, it was harder to grasp each other’s meaning and emotions through observation. ”

Cindy, 27 year old



Recommendations

The following 4 recommendations have been drawn from the results of the survey. They aim to provide guidance to clinics who are considering their telehealth capabilities both now—during the pandemic—and when restrictions are lifted.

Private/mixed GP clinics should view telehealth as a long-term part of their patient service catalogue

Many patients have been forced to use telehealth during COVID-19. This has accelerated adoption for several appointment types, especially for follow-up appointments and less acute presentations. Clinics should also consider telehealth as a longer term part of their overall service as a significant percentage of patients have indicated preference for telehealth once the pandemic restrictions are lifted.

Clinics should use online platforms to promote their telehealth capabilities

Currently patient awareness for telehealth is growing in proportion to the frequency of attendance. We encourage clinics to push messaging about their telehealth capabilities within the clinic and also via their website, Facebook page and through SMS broadcasts. Having telehealth options at the top of the appointment options on an online booking platform is also a good way to advertise your clinic's telehealth offering.

GPs should promote telehealth to their current patients for follow-ups, results delivery, and repeat scripts and specialist referrals

Clearly, there are certain appointments (eg. vaccinations, physical examinations), which require an in-person consultation. However, there are certain types of appointments that patients prefer to use telehealth for when seeing their existing GP. These include follow-ups, results delivery, and repeat scripts and specialist referrals. Providing these appointments via telehealth is likely to become the new normal.

People are willing to pay for convenience but good communication will be important when the Medicare rebate is removed

Many patients are happy to pay privately for telehealth appointments. However, it will be important for clinics to proactively communicate changes as the COVID-19 restrictions are lifted.

“ I think it would be helpful to give patients some information about how to best prepare for the telehealth appointment upfront so that they can gather relevant information—their medical history, insurance details, photos (if applicable), think of any questions they might have, etc. ”

Svetlana, 33 year old



About HotDoc

HotDoc is Australia's largest and most trusted patient engagement platform with over 16,000 doctors listed and 5.5 million active patients.

Over 1 in 5 Australians visit HotDoc each month to connect with their favourite doctor. Patients use the platform to book online and to manage all of their (and their family's) appointments in one place. While clinics and clinicians use HotDoc as an all-in-one solution to connect with new and existing patients.

At our core, our mission is to enable the best possible patient experience. We do this by providing clinics with access to online bookings, appointment reminders, SMS recalls for clinical reminders and results, mobile and kiosk check-in, digital new patient registrations forms, online prescription renewals, and tools for encouraging preventive health.





A better healthcare experience

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