Uptake of Telehealth

# HealthEngine Findings & Insights

July 2020

**Health**Engine

Sharing learnings from our work to help GPs and patients connect via telehealth.

# Contents

# Opening from Dr. Marcus Tan

## CEO, Co-Founder & Medical Director

We are pleased to provide this report which outlines some key insights from our work to date helping practices and patients connect via telehealth.

Since early March 2020, the COVID-19 pandemic and the associated lockdown measures have been the catalyst for telehealth adoption. The sheer necessity arising from having to provide a service to patients in isolation, for the safety of the clinician, staff and the patients themselves, combined with the introduction of a broader telehealth medicare rebate has seen the usage of telehealth scale greatly in a few short weeks, what some say would have previously taken a decade or longer to achieve.

This report represents a snapshot of the early telehealth experience from HealthEngine's perspective working with 730 GP practices as well as four established and dedicated virtual care providers. Telehealth accounted for 15% of overall GP appointment bookings during the April-June 2020 timeframe.

I hope you find something new or affirming on telehealth and its role today and its future contributions to the health and wellbeing of Australians and our healthcare providers.

*Dr. Marcus Tan.*

# Key Findings

## Continuity of Care

Patients looked to their regular healthcare provider for telehealth first, which supports the importance of the ongoing relationship, follow-up visits and overall care.

## Phone vs. Video

While phone consultations topped video for telehealth, there is patient interest for video appointments and it wasn't often an option. However, for the dedicated virtual care providers on HealthEngine, 3 of the 4 only offered video for consults.

## The Roles and Reach of Dedicated Virtual Care Providers

While the brick and mortar GP practices covered 98% of the telehealth consultations on HealthEngine, GPs from virtual care providers helped respond to the market needs to provide expanded care opportunities for patients and filled gaps in care as part of the primary care ecosystem.

## Reason for Telehealth

COVID-19 wasn't the only reason patients chose telehealth, which supports a continued opening for this alternative care offering when timing, location or situation warrants.

## Telehealth Valued in Regional Cities

Uptake in the regional cities topped the capital cities, recognising the additional value telehealth provides in areas where distances to healthcare practices can be greater.

## After Hours Telehealth

Of the 730 GP brick and mortar practices who offered telehealth, 37% of these practices also provided after hours support and covered the majority of appointments. However, in the late night and early morning hours, support by virtual care providers dramatically increased as they were available to step in and support patients when they needed it most.

# Overview of Dashboard and Research

From April-June 2020, we gathered insights on the uptake of telehealth through a dashboard which gathered data direct from HealthEngine's booking system as well as conducted a survey of patients who had booked and had a telehealth appointment. We also reviewed specific data tied to four dedicated virtual care providers linked to the HealthEngine booking system during this time period.

## The Uptake of Telehealth Dashboard



With the dashboard, we looked across Australia to compare usage of telehealth compared to face-to-face appointments, both of which were booked online.

Nearly 220,000 telehealth appointments contributed to this data. The dashboard allows for viewing by individual state, by generation and by month or three month time period. It includes information from GP practices who offered HealthEngine telehealth services or used their own with the booking platform. This does not account for practices listed on HealthEngine who may have offered telehealth appointments but did not publish them on HealthEngine.

**Explore the dashboard  ›**

## Telehealth Post-Appointment Survey

Survey included patients who had booked and had a telehealth appointment on HealthEngine between December, 18, 2019 and April 30, 2020.

**496 patients**

433 complete surveys        63 partials

**Age 18-65+**

**Booked over 4 months**

## Dedicated Virtual Care Providers Data

Beyond the dashboard, we also looked at data tied to four established dedicated virtual care providers, also known in the industry as GP telehealth corporates. They offered around the clock appointments for patients, 7 days a week on HealthEngine during the April-June time period. These groups are pioneers in the virtual care space. Long before medicare rebates were available, their GPs have delivered virtual consultations with patients throughout Australia to help fill gaps in care as part of the primary care ecosystem.

Having these well-established groups on HealthEngine brought good value and allowed patients to access care from experienced telehealth GPs when unable to book with their usual provider.
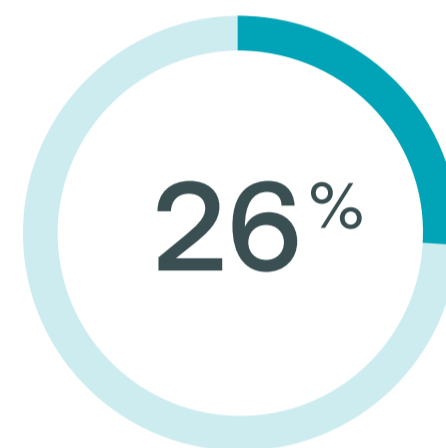
# Learnings & Insights

## 01.

## Continuity of Care
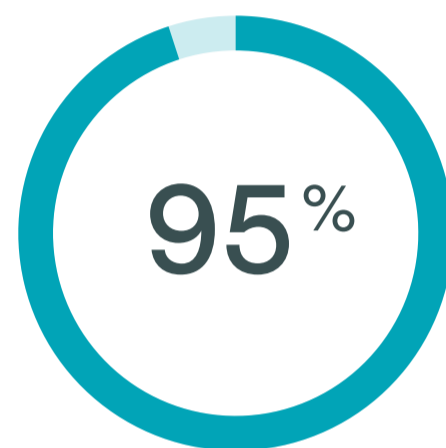
**95**% Patients that had been to the practice before

**26**% Booked a follow up visit

**86**% Would book again with the practice for either face-to-face or telehealth appointments

While the response to COVID-19 necessitated the fast rise and use of telehealth, there remains some skepticism and questions about its role in supporting continuity of care. This includes patients seeing their regular healthcare practitioner and being able to book follow up visits. Both the Dashboard and Patient Survey findings identified telehealth's role in supporting continuity of care.

> **The survey found that 95% of respondents had been to the practice before, showing that patients looked to book telehealth with their regular GP/practice.** 26% had follow-up visits with the practice. Overall, 86% said they would book again with the practice for either face-to-face or telehealth appointments.

There was also parity between new patients to a practice whether for telehealth or face-to-face appointments, looking at the Dashboard's data set. Findi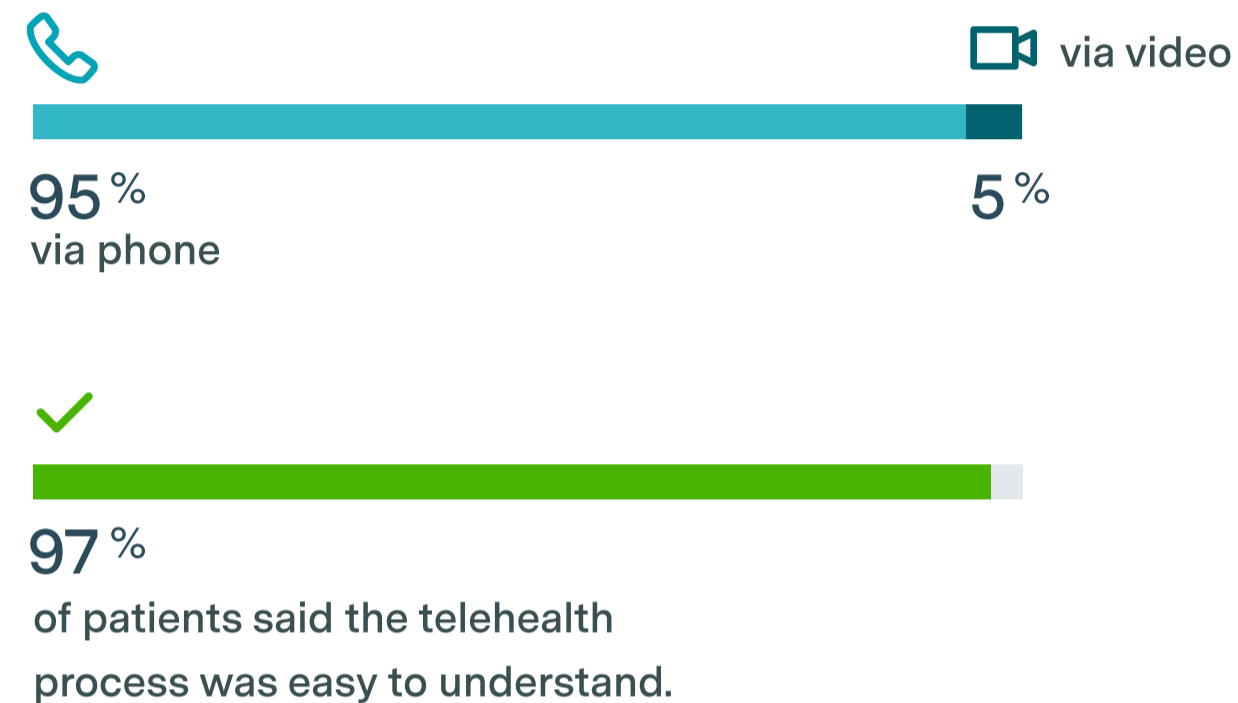ngs show that only 6% of people booking telehealth appointments were new to the practice, compared to 7% of people booking face-to-face appointments.

Reviewing the national median distances between patient and practice for appointments also confirmed most people were staying local when booking telehealth at 4km compared to 3km for face-to-face. (For reference, distances were calculated from centre of patient's postcode to the practice address). Most common distance (mode) was 1 km for each. Across the individual states and territories, median figures were consistent or close to national distances.

The greatest distance identified for a face-to-face appointment was 2178 km with someone from Kalumburu (WA) booking a GP in Midland/Perth and 3826km for a telehealth appointment by someone in Carnarvon (WA) booking with a provider in Brisbane (QLD). The high distances logged for face-to-face, could be attributed to travelers, grey nomads, people living and working between two areas or recent moves and for telehealth, could be similar reasons along with need to access care at a time when a local provider wasn't available.

## 02.

# Phone vs. Video

95 %
via phone

5 %
via video

97 %
of patients said the telehealth
process was easy to understand.

The patient survey found the vast majority of telehealth consults were via telephone which was driven by the practice or choice of the patient (95% via phone vs 5% video). **However, 15% of patients surveyed said they would prefer a consult by video.** Video consultations have faced some technological challenges and inconsistent experiences based on internet connectivity on both the patient and provider ends.

It is important to note that of the four dedicated virtual care providers on HealthEngine, three of the four only offered video consults through secure, established telehealth platforms and one offered both video and phone options.

As we look to the future of telehealth, video consults can provide a greater opportunity to support more types of appointments along with the integration of self-monitoring devices.

**97% of survey respondents found the overall telehealth process easy to understand.**

## 03.

# Reasons for Choosing Telehealth

59 %

Patients said it was to
avoid contact with
people due to COVID-19
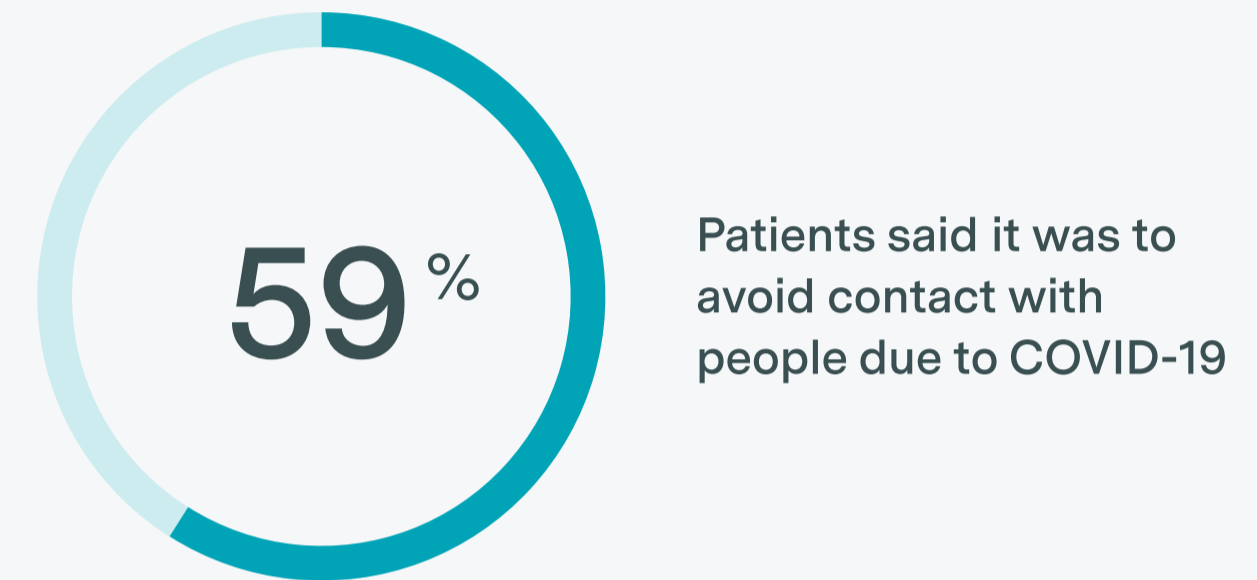
The survey identified the top reasons for patients selecting telehealth, and respondents could choose more than one option. While COVID-19 escalated telehealth use, and 59% said it was to avoid contact with people due to COVID-19, that leaves 41% choosing telehealth for other reasons. This suggests that people see other benefits to telehealth and its role as a viable healthcare option beyond the pandemic.

For the next two reasons, 27.9% said it was the only option available and 27.6% said to save time (travel/waiting). 19% said it was due to appointment availability. Unable to travel to a GP, urgency and cost factors rounded out the list. Other responses provided by respondents included prescription requests or repeats and referral updates.

04.

# The States (& Territories) of Telehealth

The Dashboard looked at the percentage of telehealth appointments compared to face-to-face appointments across the states and territories.  The top three states for telehealth appointments were ACT with 23%, WA with 14%, and NSW at 13%.  Other states followed with SA and VIC tying at 12%, QLD  at 10%, TAS at 9% and NT at 3%.

Regional cities also topped the capital cities for telehealth use with the top five as  Bathhurst (NSW) at 76%, Nowra-Bomaderry (NSW) 58%, Busselton (WA) at  46%, Rockhampton (QLD) at 43%, and Wollongong (NSW) 41%. No capital cities were in the top 10.

## Top 5 Regional cities for Telehealth

1 **Bathhurst**  76 %
(NSW)

2 **Nowra-Bomaderry**  58 %
(NSW)

3 **Busselton**  46 %
(WA)

4 **Rockhampton**  43 %
(QLD)

5 **Wollongong**  41 %
(NSW)

## Top 3 States for Telehealth



23% ACT

14% WA

13% NSW
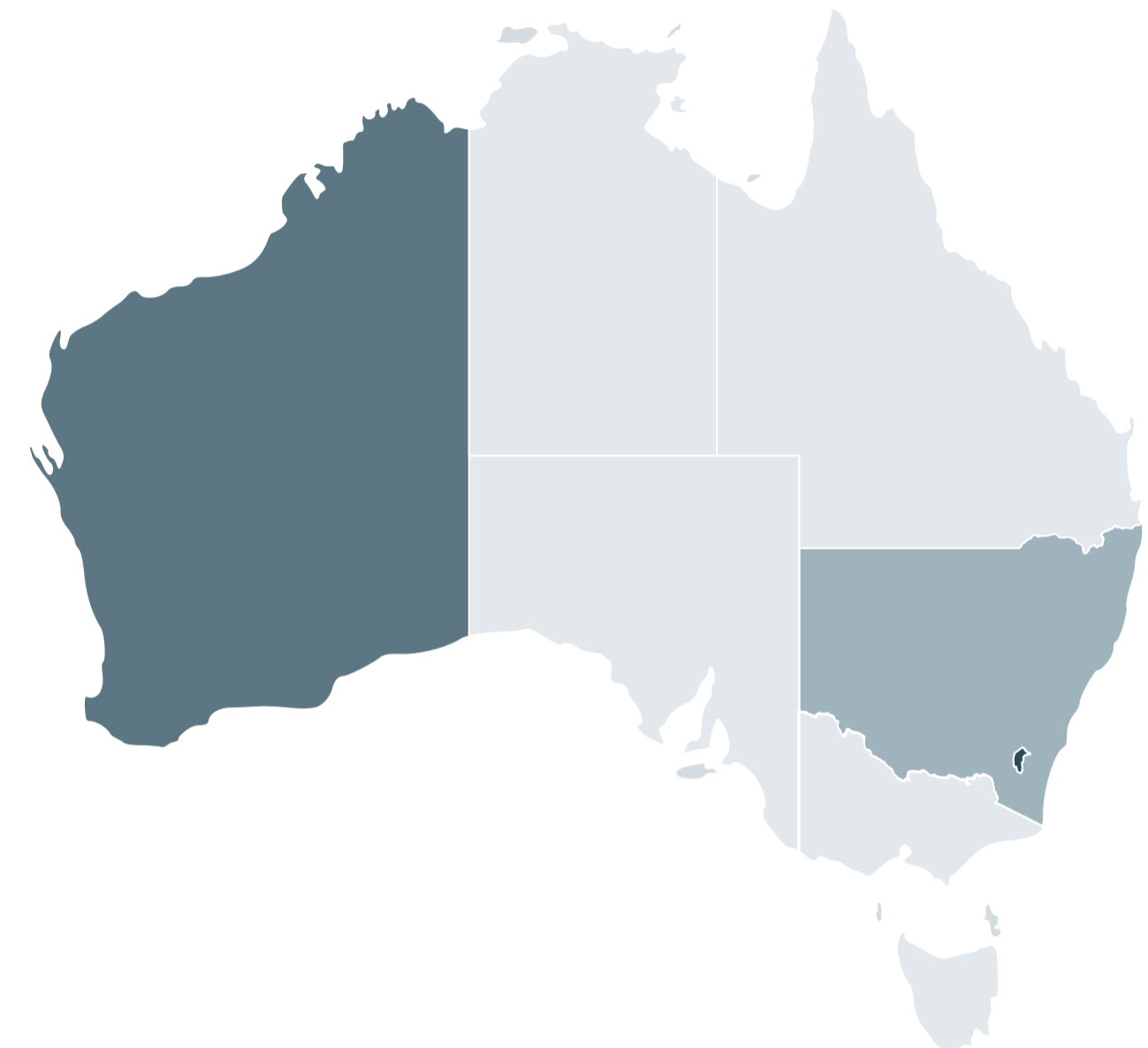
Explore the dashboard  >

## 05.

# After hours Telehealth

Seeing the opportunity to support patients outside of normal clinic hours, 37% of brick and mortar GP practices offered after hours telehealth consultations.  They took the lead on handling after hours appointments, except in the late night/early morning hours where dedicated virtual care providers filled the gaps.

Looking at Monday-Sunday, brick and mortar GP practices covered 87% of after hours appointments with patients while the virtual care providers covered 13%. For Monday-Friday, 78% of patient telehealth appointments taking place were covered by GP practices and virtual care providers covered 22%.

It was during the post-10 pm until 7 am time frame, where the dedicated virtual care providers handled 92% of after hours appointments with patients, demonstrating a need in the late night and early morning hours for this dedicated, specialised support.

## 06.

# The Roles and Reach  of Dedicated Virtual Care Providers:

The dedicated virtual care providers on HealthEngine are pioneers in the space with the earliest providing online doctor support starting in 2011.  The GPs have extensive training in providing telehealth consults.  While the brick and mortar GPs covered 98% of telehealth appointments booked on HealthEngine, the four dedicated virtual care providers played an important role supporting after hours appointments with patients.  They covered 13% (Mon-Sun) to 22%  of appointments (Mon-Fri). This jumped to 92% when looking at post-10 pm until 7 am appointments with patients.

The availability of bulk billed services via the MBS rebate, saw both brick and mortar GP pratices and dedicated virtual care providers being able to offer telehealth appointments with no out-of-pocket expenses for the patient. This increased overall GP access and support options for patients.

Use of the dedicated virtual care providers was highest in Tasmania (18%) and the Northern Territory (7%) with other states ranging from 1 - 2.25%, which reflects the value the groups offer, especially in more rural and regional areas.  Overall, the virtual care providers helped cover gaps to ensure people had access to care when they needed it, contributing to the primary care ecosystem.

07

# Behaviours of booking telehealth vs face-to-face appointments

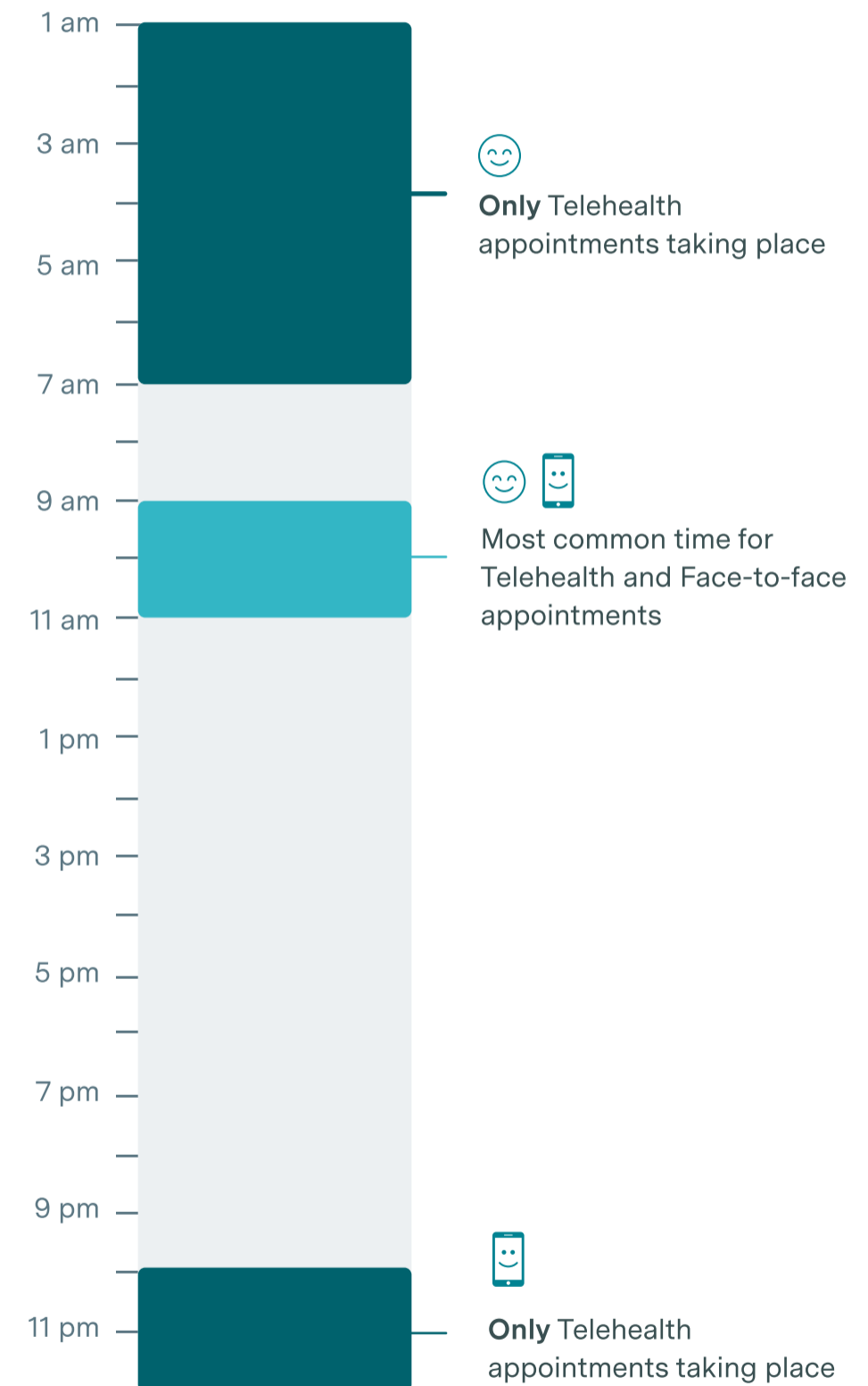The dashboard identified appointment trends for appointment times and days of weeks.

The dashboard findings for April-June revealed a number of consistencies between telehealth and face-to-face appointments. Mondays and Tuesdays were the highest days for appointments of either type, and between 9 am and 11 am was the most popular time window for appointments. Overall, between 7 am and 9 pm, there was parity in appointment times across telehealth and face-to-face. Between 10 pm and 7 am, only telehealth appointments took place, which demonstrates the added access and support telehealth can bring to patient care when people need it most.

## Appointments breakdowns by day of the week

Mondays and Tuesdays were the highest days for appointments of either type

Monday    Tuesday    Wednesday    Thursday    Friday    Saturday    Sunday
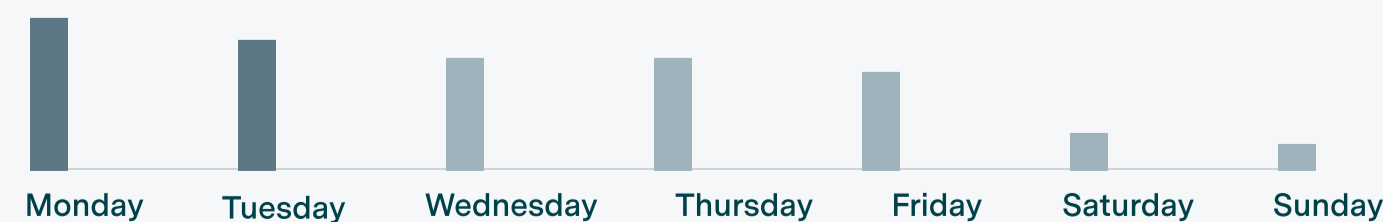
## Telehealth and face-to-face appointments by time of day

1 am
3 am
5 am
7 am

**Only** Telehealth appointments taking place

9 am

Most common time for Telehealth and Face-to-face appointments

11 am
1 pm
3 pm
5 pm
7 pm
9 pm
11 pm

**Only** Telehealth appointments taking place

**Only** Telehealth appointments taking place

Most common time for Telehealth and Face-to-face appointments

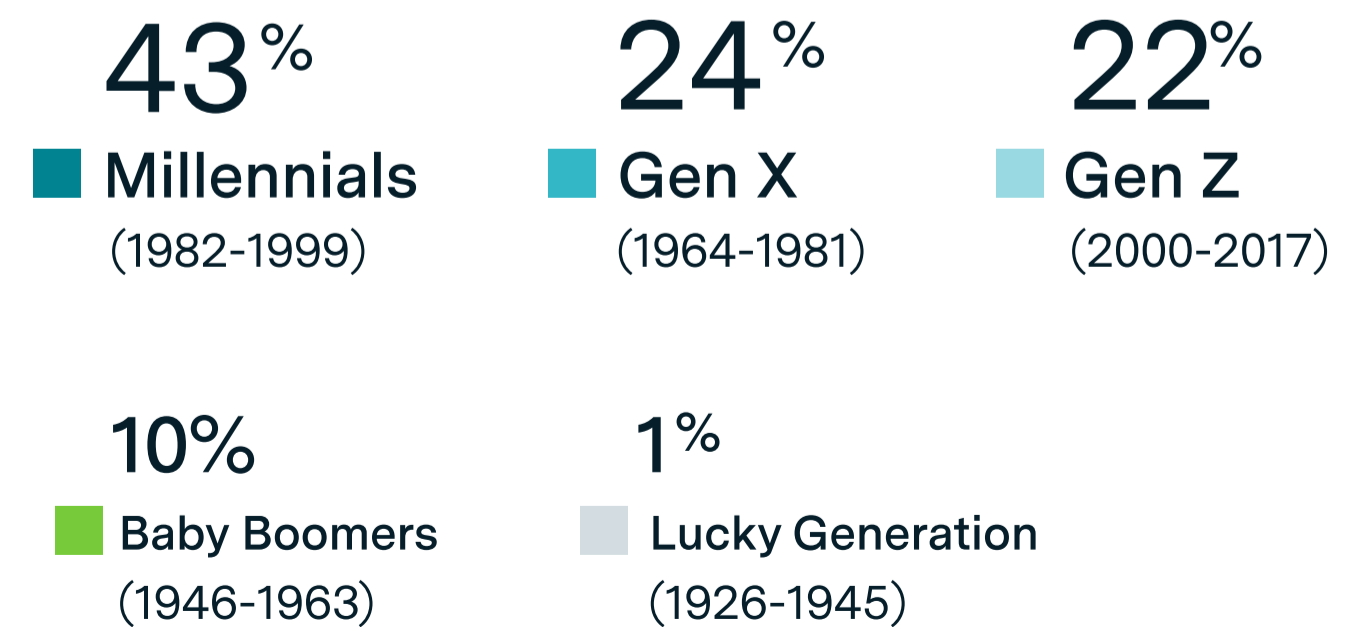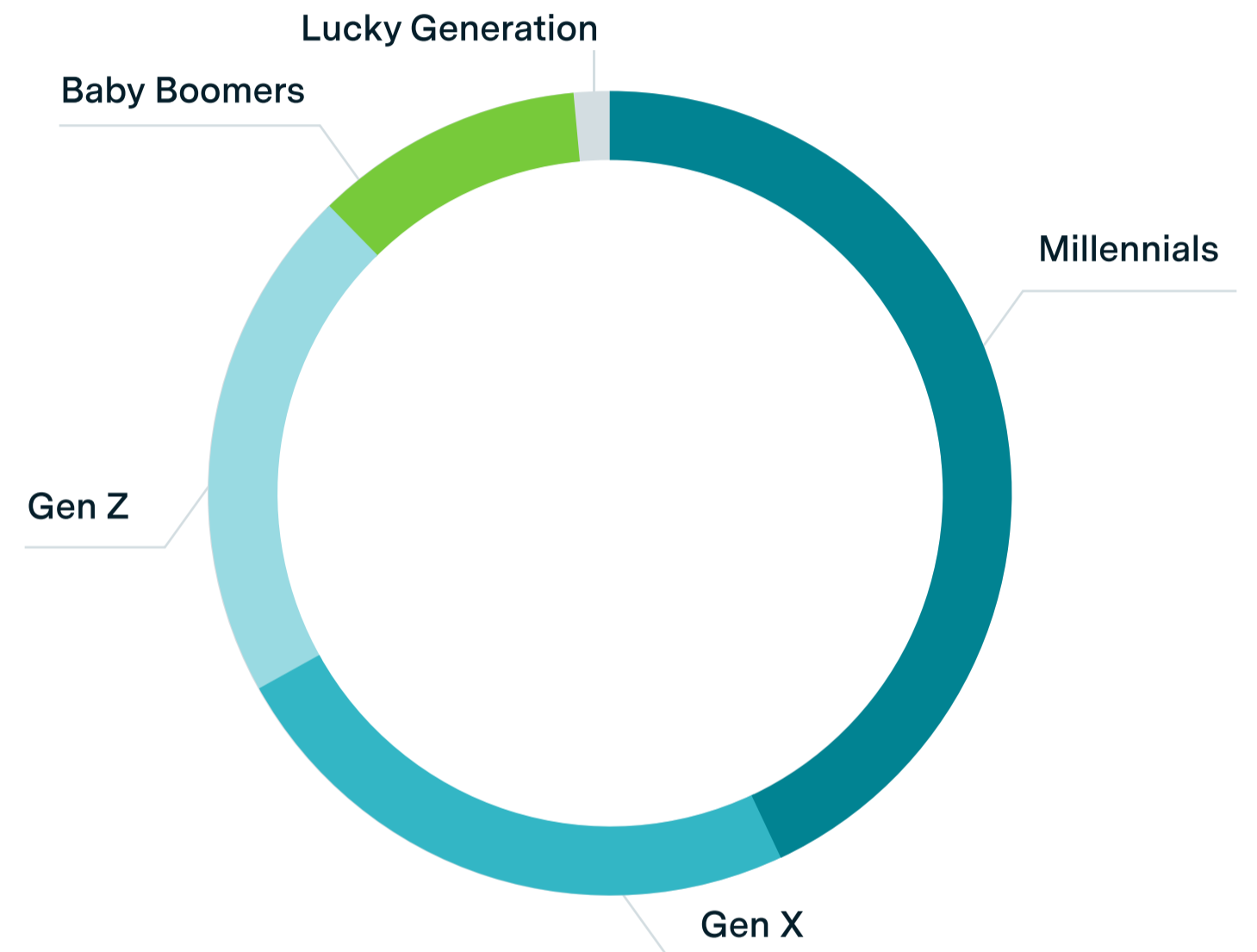**Time frame for both Face-to-face and Telehealth appointments**

08

# The Age of Telehealth

With the Dashboard, five generational groups were reviewed, and Millennials were the highest users of telehealth (43%), followed by Gen X (24%) and Gen Z (22%). For comparison, these are the three highest groups for HealthEngine's standard user base for face-to-face appointments as well. Baby Boomers represented 10% and the Lucky Generation at 1%.

The tech-savvy core millennial user leads the way across generations with online bookings for healthcare management. Nationally, patient age was also consistent across telehealth and face-to-face appointments, with 30 years as the most popular age (mode) and median age across both was 34. Looking at the states and territories, there were not significant differences from national findings. Most popular ages for face-to-face appointments ranged from 27-31 and 30-34 for telehealth.

These findings seem consistent with expectations of technology use, but also demonstrate a greater opportunity to reach the senior population to extend telehealth accessibility and approachability.

## The Age of Telehealth by Generation



| **43**% | **24**% | **22**% |
|---|---|---|
| ■ Millennials | ■ Gen X | ■ Gen Z |
| (1982-1999) | (1964-1981) | (2000-2017) |

| **10**% | **1**% | |
|---|---|---|
| ■ Baby Boomers | ■ Lucky Generation | |
| (1946-1963) | (1926-1945) | |

# Opportunities Ahead

**Expand access to care along with more flexibility and patient consultation opportunities for healthcare providers**

30% of GP practices on HealthEngine offered telehealth, and based on the patients' responses, there is interest in virtual care as an alternative care option when location, situation or timing warrants.

In addition, 37% of 730 GP practices providing telehealth offered and had after hours consultations with patients. This demonstrates how practices recognised the opportunity to help expand access to care for patients while also providing flexibility and more patient consultation opportunities for GPs and other healthcare providers interested in exploring telehealth.

Dedicated virtual care providers with deep experience and training in telehealth can continue to fill gaps in the primary care ecosystem and ensure patients have the choice and access to care when and where they need it.

**Video & Device Integration**

While phone was a preferred method of consultation for many patients and GPs, video consults can provide a greater opportunity to support more types of consultations and incorporate self-monitoring devices and other tools to strengthen the patient experience. From a virtual care provider standpoint, video is the standard for consults.

**GP & Beyond**

When HealthEngine first helped practices offer telehealth via private pay or bulk bill starting in mid-March, the offering included phone or video consultation through FaceTime, Skype or WhatsApp. In the following weeks, we introduced a Secure HD Video product, hosted within Australia, that offers seamless integration with practices' practice management systems. We continue to work with leading virtual care providers and telehealth software providers to provide GP, Dental, Allied and Specialty practices with options.

**Accessibility through the Ages**

There's also an opportunity to make telehealth more accessible, approachable and acceptable to the older generations or others who may need more periodic check-ins with their GPs to support care that telehealth could provide.

**Patients First**

With reforms announced July 10 for Medicare-subsidised telehealth services and the continued reviews ahead, HealthEngine remains committed to making telehealth accessible for patients first and foremost. While COVID-19 escalated the awareness and uptake of telehealth, we see opportunities for its continued growth, relevance and refinement with the introduction of standards, along with education on appropriate use to benefit the care of patients.

# Telehealth Insights Dashboard and Patient Research

Visit our dashboard to see **State-specific** data. Select the state, generation and the time period you would like to explore.

**Explore the dashboard**

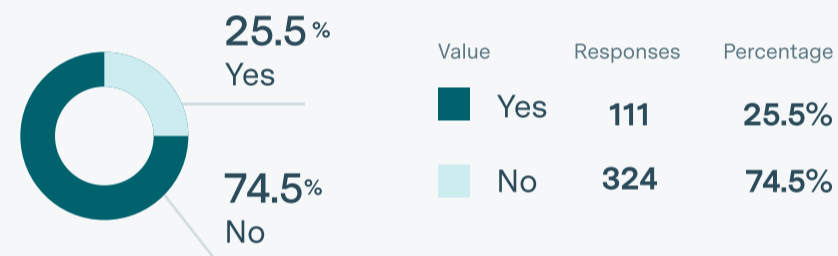# Background on Telehealth Post-Appointment Survey

The following provides an overview of consumer/patient survey data shared throughout report.

## Continuity of Care

**Have you visited this practice before?**

5% No

95% Yes

| Value | Responses | Percentage |
|---|---|---|
| Yes | 415 | 95% |
| No | 22 | 5% |

**Did you require an in-person follow-up appointment?**

25.5% Yes

74.5% No

| Value | Responses | Percentage |
|---|---|---|
| Yes | 111 | 25.5% |
| No | 324 | 74.5% |

**Would you book another appointment (either face-to-face or telehealth) with this practice?**

13.6% No

86.4% Yes

| Value | Responses | Percentage |
|---|---|---|
| Yes | 19 | 86.4% |
| No | 3 | 13.6% |
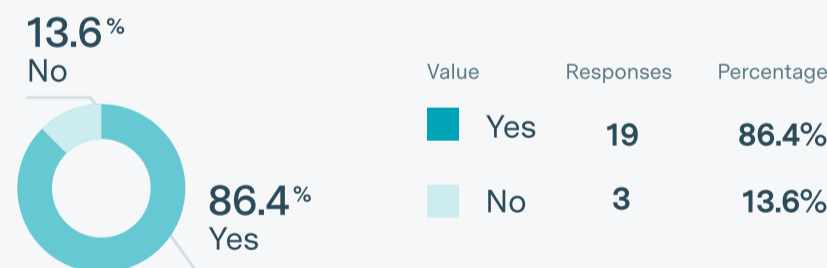
## Telehealth Experience

**Was this your first time booking a telehealth appointment?**

50.5% No

49.5% Yes

| Value | Responses | Percentage |
|---|---|---|
| Yes | 217 | 49.5% |
| No | 221 | 50.5% |
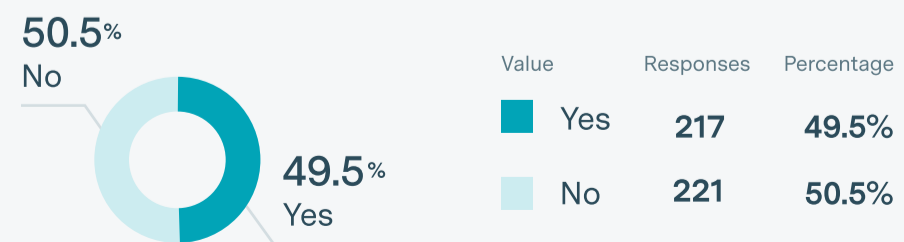
## What made you choose a telehealth appointment over face-to-face?

Multiple selection question



- Appointment availability
- Save time (travel/waiting)
- Unable to travel to a GP
- Urgency
- Cost
- This was the only option available
- To avoid contact with people due to COVID-19
- Other
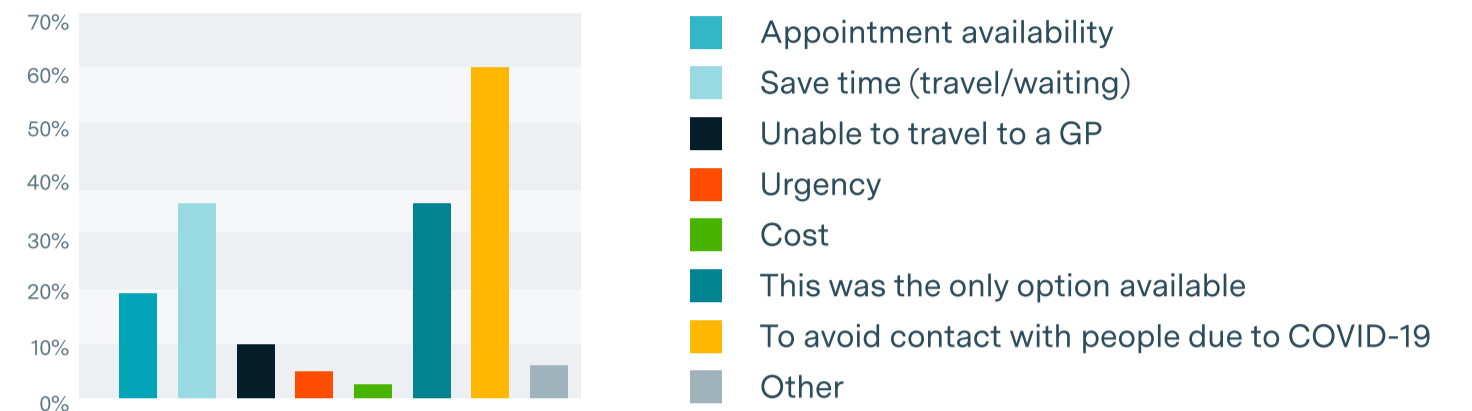
**Was the appointment over video or phone?**

4.6% Video

95.4% Phone

| Value | Responses | Percentage |
|---|---|---|
| Phone | 414 | 95.4% |
| Video | 20 | 4.6% |
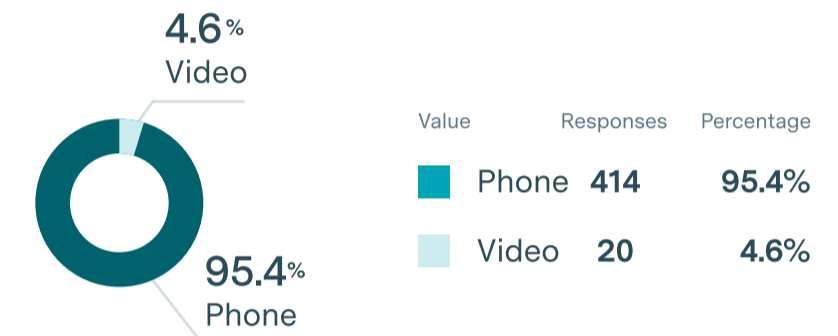
**Was phone your preferred method of contact?**

14.7% No, I would have preferred video

85.3% Yes

| Value | Responses | Percentage |
|---|---|---|
| Yes | 353 | 85.3% |
| No, I would have preferred video | 61 | 14.7% |

**Did you find the overall process easy to understand?**

3% No

97% Yes

| Value | Responses | Percentage |
|---|---|---|
| Yes | 421 | 97% |
| No | 13 | 3% |
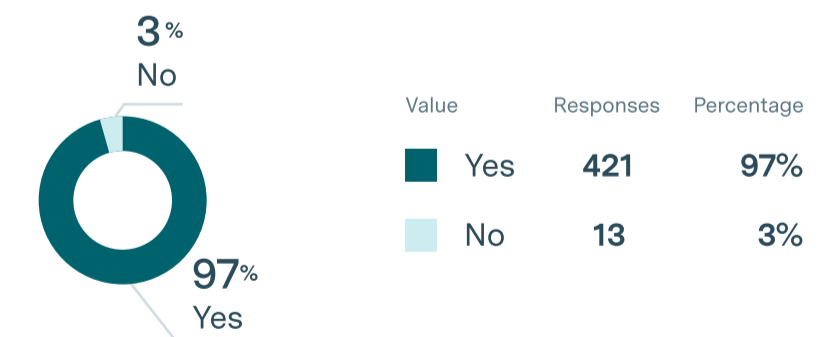
**Would you book another telehealth appointment in the future?**

9.9% No

90.1% Yes

| Value | Responses | Percentage |
|---|---|---|
| Yes | 392 | 90.1% |
| No | 43 | 9.9% |
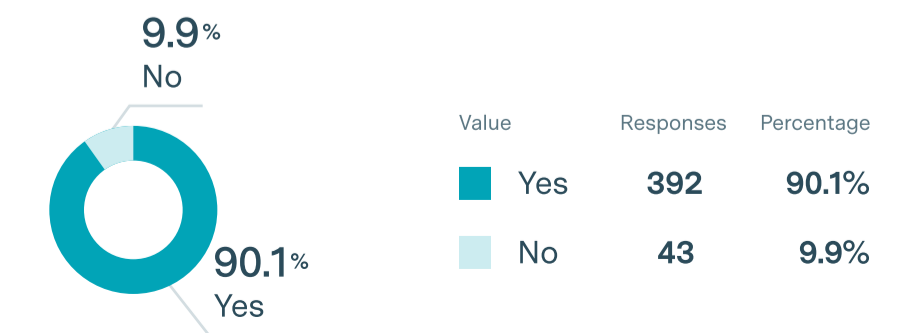
## About HealthEngine

HealthEngine is Australia's largest consumer healthcare destination and the #1 go-to for healthcare bookings.

Founded in 2006, HealthEngine is on a mission to transform Australia's healthcare by making it easier for people to connect with their healthcare providers online and for health practitioners to deliver a great patient experience through technology. More than 7 million people in Australia have made more than 30 million bookings on the platform.

For more information on HealthEngine or the Uptake of Telehealth Insights Report, please contact press@healthengine.com.au

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