

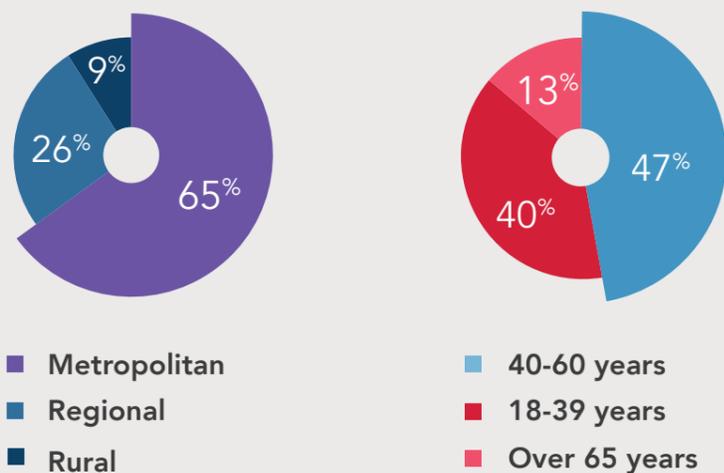
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# Patient Engagement Survey 2018

In partnership with  HotDoc

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## About the Study

MedicalDirector's 2018 Patient Engagement Survey in partnership with HotDoc, is based on a quantitative survey of 2826 participating patients who have visited a general practice in the months of March and April 2018 located in rural (9%), regional (26%) and metropolitan (65%) Australia. The patient engagement survey was completed by a both men (11%) and women (89%), with 39% aged 18-39 years old, 47% aged 40-64 years old and 14% over 65.

## 1. Executive summary

Emerging technologies, cloud-based solutions and the uptake of mobile engagement, is opening up new communication and information channels, and is rapidly re-shaping patients' expectations from their primary healthcare providers.

MedicalDirector's Patient Engagement Survey 2018, conducted in partnership with online appointment and eHealth platform, HotDoc, shows patients are now increasingly demanding technologies that give them more choice and control over their engagement with their doctors.

Surveying over 2,000 patients across Australia, we discovered a resounding **70% of patients want healthcare providers to better use digital tools, mobile technology and the internet to improve their patient experience.** Patients are particularly attracted to specific technologies that could help them better manage their appointments, communicate with their General Practitioners (GPs) and obtain test results and diagnoses. This presents both opportunities and challenges for the healthcare industry to find ways to adapt and meet the fast-evolving expectations and needs of today's digitally-empowered patients.

Yet, despite these challenges, Australian GPs continue to provide a consistently good standard of care, reflected in good patient satisfaction, regular GP visits and ongoing loyalty to their chosen medical practices and doctors. And the positive outcome of continuity of care is reflected in good health outcomes, as evident by the finding that Australian patients, on average, rate their overall health quite highly.

Nonetheless, there is still plenty of room for improvement, especially when it comes to using the right resources to keep patients informed. **Education around health conditions continues to be an issue amongst Australian patients, with 78% of patients researching their condition online before seeing their GP. In addition, 90% say they would like more resources from their GP and fact sheets explaining their condition and how to better manage it.**

While high patient loyalty is encouraging, there is still a clear gap between patient expectations and the engagement, information and overall experience doctors are currently offering. To bridge this gap, healthcare providers need to explore how technology can increase their level of patient-centric care, and how new communication channels and resources can be utilised to offer more personalised patient experiences, enabling a future of healthcare that offers even better health outcomes.

**Matt Bardsley**  
CEO, MedicalDirector

## 2. Key insights



### Patient loyalty to the same GP

**72%** 2 years +  
**9%** 1 year  
**8%** 6-12 months  
**11%** < 1 year

### How often Australians visit their GP

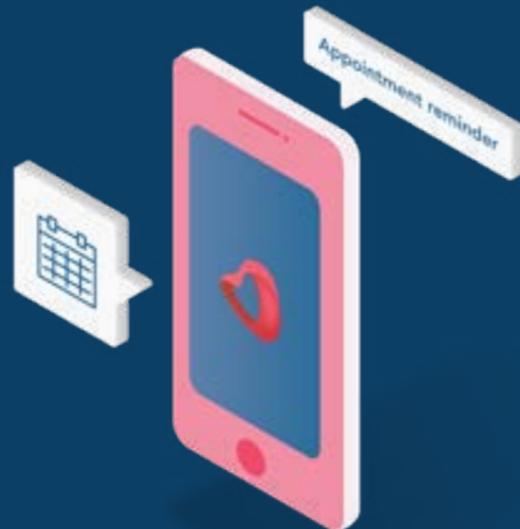
**80%** At least every 6 months  
**18%** Every 6-12 months  
**2%** < 1 year

### How Australians rate their health

**3%** Perfect  
**53%** Very Good  
**38%** Average  
**6%** Poor  
**<1%** Very Poor

### What patients see as "extremely important" to improve clinical experience:

- 62%** Online booking system
- 56%** Text reminders for upcoming appointments
- 52%** Test results/diagnoses via text, email or phone
- 48%** Follow-up reminders via text, phone or email



### 80% of Australians

Want to be texted results such as blood tests and radiology



### Australians demand a secure digital health ecosystem

- 93%** Rate security is a top concern
- 91%** Rate privacy is a top concern
- 58%** Say sharing information with other health providers is a key benefit to an online digital health environment

### 70% of Australians

Think Healthcare providers can better use digital tools, mobile technology and the internet to improve patient experience



### Patients want more from their GPs than Dr Google:

- 90%** Want a fact sheet from their GP explaining their condition and how to better manage it
- 88%** Didn't receive any additional health education from the GP since their last consultation
- 80%** Would prefer to look up such health related information on their practice's website
- 78%** Research their conditions online before seeing their GP
- 78%** Research online about their condition or prescribed treatment following a GP consultation
- 42%** Want a follow-up email after doctor consultations with further health education information
- 16%** Of patients of poor or very poor health did receive additional health education from the GP since their last consultation

**About the study:** MedicalDirector's 2018 Patient Engagement Survey in partnership with HotDoc, is based on a quantitative survey of 2826 participating patients who have visited a general practice in the months of March and April 2018 located in rural (9%), regional (26%) and metropolitan (65%) Australia. The patient engagement survey was completed by a both men (11%) and women (89%), with 39% aged 18-39 years old, 47% aged 40-64 years old and 14% over 65.

### 3. Continuity of care and better health outcomes

Continuity of care is an essential part of enabling better health outcomes, and boosting patient engagement can help enhance loyalty.

The research found continuity of care is high in the Australian healthcare system, with most patients (80%) visiting their doctor at least every 6 months. Patient loyalty to their GP is also high, as 72% of respondents have been seeing the same doctor for more than 2 years. Only 2% of patients visited their GP less than once a year.

“The statistics around patient loyalty to their GPs doesn’t surprise me, because I see that in my own practice. It is a good thing as continuity of care always leads to better health outcomes.”

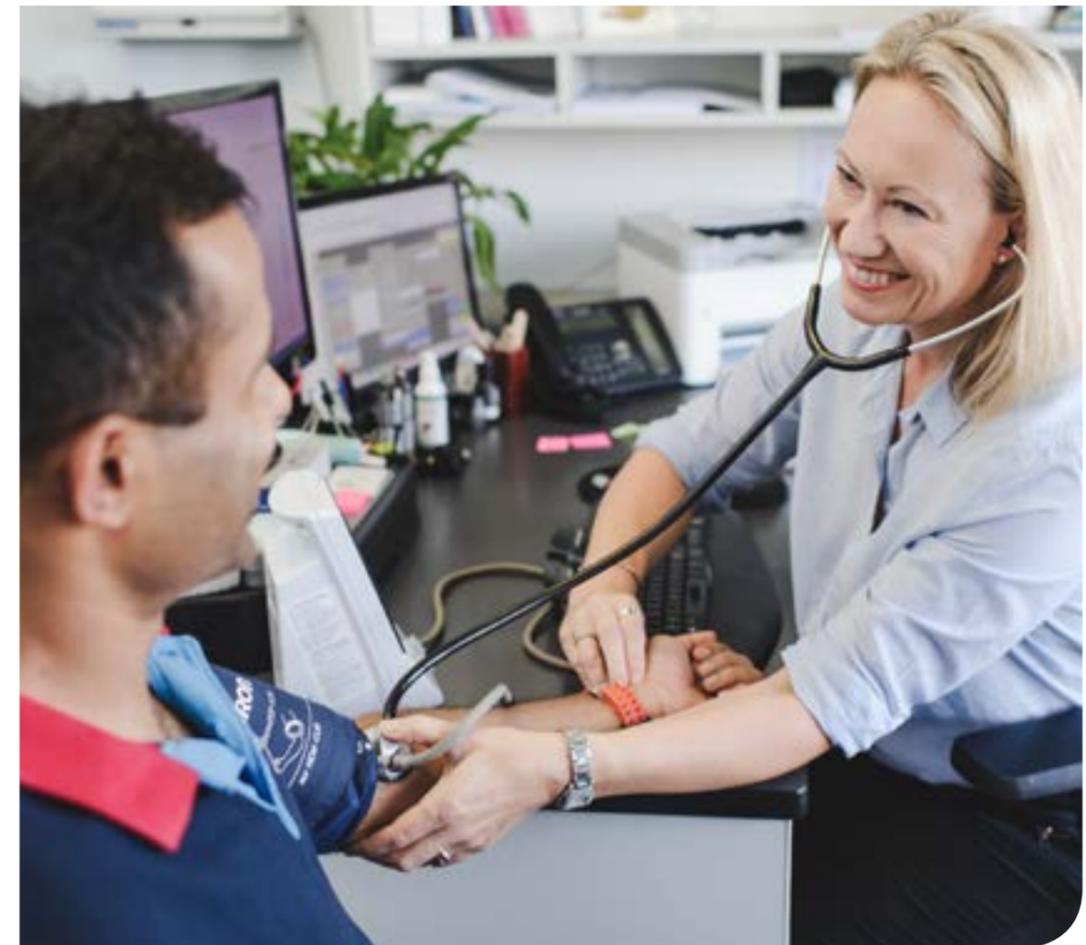
**Dr Charlotte Middleton**  
GP and Chief Medical Advisor at MedicalDirector

Continuity of care as a critical enabler to better health outcomes, is further reflected by the finding that more than half of Australians (56%) consider being in very good or perfect health. A further 38% describe their health as average, and only 6% rate their health as poor.

“In Australia we’re ranked second by the World Health Organisation for economic and health outcomes, and I think continuity of care plays an important part in this. It’s really great to see that patients are seeing their GPs often.

But there are many contributing factors that a GP needs to understand, and having the right knowledge as well as the right tools can inform even better decisions, and enhance patient experience further.”

**Matt Bardsley**  
CEO, MedicalDirector



#### Patient Loyalty to the same GP

- 72% 2 years +
- 9% 1 year
- 8% 6-12 months
- 11% < 1 year

#### How often Australians visit their GP

- 80% At least every 6 months
- 18% Every 6-12 months
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#### How Australians rate their Health

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Perfect
- 53%  
Very Good
- 38%  
Average
- 6%  
Poor
- <1%  
Very Poor



## 4. Patients expect GPs to use more technology

Patients' expectations from their GPs has changed rapidly, particularly as technology such as smartphones and wearables are already facilitating a highly personalised, engaging and real-time experience in other aspects of their everyday lives.

The research makes it clear that the majority of patients want technology to play a far more pivotal role in the way their GPs engage with them before, during and after consultations. In fact, a resounding 70% of respondents agree that GPs could use digital tools, mobile technology and the internet to improve patient experience. This figure is slightly higher (71%) for patients who perceive their health to be poor or very poor.

### Australians want doctors to improve patient experience with technology



#### 70% of Australians

Think Healthcare providers could better use digital tools, mobile technology and the internet to improve patient experience

More specifically, patients are looking for technologies that can help them better manage their appointments, communicate with their GPs and easily access test results and diagnoses. Over half of the respondents agree that online bookings, text reminders for upcoming appointments and receiving test results/diagnoses via text, email or phone are all extremely important.

According to Middleton, it's all about personalising and helping the patient's journey, where they can make their own appointments easily and get reminders before they even walk in the door.

*“We have an online booking system at our practice, and we regularly get compliments from patients who recognise its value in improving their experience, especially if the receptionist is very busy and the patient can't get through via telephone,” Dr Middleton said. “It removes any frustration before they even walk in the door, and saves time for everyone.”*

*“I think text reminders are also key in reducing “no show” rates in practices. Patients often forget or get the time wrong. They would definitely benefit from text reminders, and so would my practice.”*

HotDoc CEO and Founder, Dr Ben Hurst, agrees, stressing GPs should consider their patient interactions more longitudinally, and realise that traditional ways of interaction such as phone calls or letters, may no longer be relevant in today's highly digitised environment.

*“Once upon a time, doctors had to write letters to patients if they wanted to make contact; the appointment-based model of healthcare was literally the most efficient.*

*But these days, SMS and digital technology allows for more frequent and engaging interactions with patients. This started with SMS reminders, but has since progressed to secure recalls and results notifications and educational material. Doctors are clearly underusing these tools, which could engage their patients more effectively and positively impact health outcomes.”*

#### Dr Ben Hurst

HotDoc CEO and Founder

Dr Hurst highlighted that technology solutions like HotDoc, are dedicated to enabling GPs with the right tools to offer the best possible patient experience through exceptional communication.

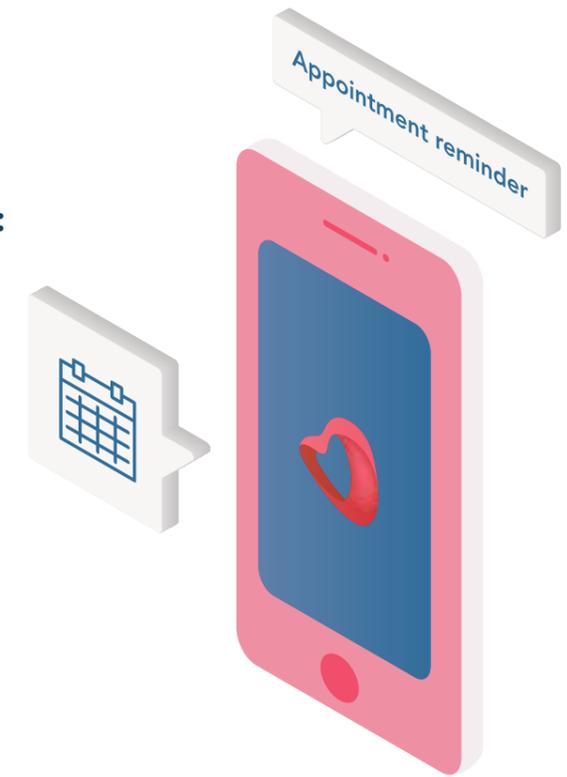
*“We provide ways for practices to improve their efficiency, while also delivering a better experience with features like online bookings, check-in and repeats,” he said. “We can also help practices engage their patients more effectively with recalls and reminders.*

*We believe that when patients have a positive healthcare experience, they are more likely to build a strong relationship with their doctor and take positive steps for a healthier version of themselves.”*



### What patients see as "extremely important" to improve clinical experience:

- 62% Online booking system
- 56% Text reminders for upcoming appointments as extremely important
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### 80% of Australians

Want to be texted results such as blood tests and radiology

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The research also shows that most patients are keen to receive test results via text message. 80% of respondents said they are ready to receive blood tests and radiology results on mobile devices, if done in a secure environment.

But while this innovation is important and the research shows there is clearly an expectation for it, Bardsley stresses we also need to respect the intricacies of a doctor-patient relationship and what it means to communicate in healthcare.

**“** We absolutely see a future where that is possible, but the doctor-patient relationship needs to be effectively managed to mitigate any risks to the patient on a case-by-case basis,” he explained. “Information always needs to be provided to patients with the appropriate support structures. That’s why the doctor needs to play an integral part in that communication, at all times.” **”**



## 5. Security is everything

Australians demand a secure digital health ecosystem where the protection of their privacy is a top priority. When it comes to accessing medical health records, over 90% of respondents agree both security (availability, accuracy, safety and integrity of data) and privacy (confidentiality and appropriate use of data) are extremely important.

According to Bardsley, we can clearly see from the survey that there is an absolute appetite for better digital experiences, that would enable an innovative and ideal healthcare ecosystem. However, this ecosystem needs to be developed with a security-first mindset.

“We take universal sentiments about security being everything to patients very seriously, which is why we support that innovation through our partner ecosystem, and our solutions leverage the market-leading secure platform Microsoft Azure.”

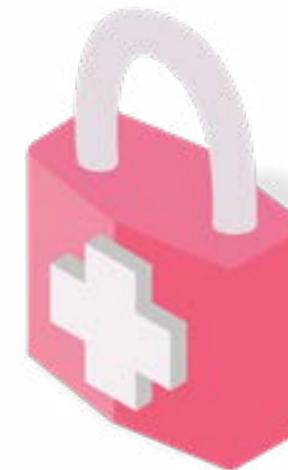
Dr Hurst agrees, further highlighting security and confidentiality of patient data as critically important to developing a system of secure doctor-patient communication channels, while secure transmission of results is imperative to the patient experience. This, in turn, means clinics should be careful when selecting a vendor to achieve a more trusted, secure environment in which to communicate with their patients.

“Following the recent Facebook scandal regarding data leakage, patients are unsurprisingly cautious around the transmission of their data,” Dr Hurst said. “If clinics use a provider that stores or securely transmits patient data, they should conduct due diligence to ensure that the vendor is a trusted provider and abides by the latest privacy principles.”

In the future, Dr Hurst predicts patients would ideally access their results either through their personally controlled health record or a trusted patient portal.

“Where appropriate, these results would be accompanied by the doctor’s interpretation such that patients can better contextualise the results,” he explained. “Should patients require further information around their results, they would be able to access these either through a paid remote consultation or an in-person consult.”

“This type of service would be both value-add for patient experience and an efficiency booster for the practice given that they would not need to take as many follow up calls from patients around normal or non-urgent results.”



### Australians demand a secure digital health ecosystem

**93%** Rate security is a top concern

**91%** Rate privacy is a top concern

**58%** Say sharing information with other health providers is a key benefit to an online digital health environment

While technology can enhance the individual patient experience when engaging with primary health providers, it also plays a pivotal role in coordinating patient needs across the wider health ecosystem. The research shows patients want an online medical health system that is easy to use, access and offers greater interoperability. A majority 70% of respondents value ease of use and access to digital health records as extremely important, and almost two-thirds agree that the ability to share information with other health providers such as specialists is also extremely important.

“We understand ease of use is important to patients, that’s why we throw our weight behind My Health Record, and we work collaboratively with the Federal Government and the Australian Digital Health Agency (ADHA) in order to add more value and support to the new initiative,” Bardsley said. “That’s why we’re so passionate about our Marketplace program, which is all about enabling those great ideas and opening those communication channels effectively between doctor and patient. We’re excited to work with many partners and share in their success, ambition and what that means to healthcare.”

## 6. Dr Google is real, but not ideal

One of the most concerning aspects of the research is that patients expect a lot more information about their health than they are currently receiving from their GPs, and are resorting to searching online to find out more about their condition, both before and after their consultation.

The research shows most patients (78%) conducted online research to find out more about their condition or prescribed treatment, both before and after visiting their GP. But a majority 80% say they would have actually preferred that information come directly from the GPs / Practice's website, assuming it is of high quality.

According to Dr Hurst, the results of this study clearly show that patients trust their doctor much more than Google. However, they are not always receiving health information they crave in the 10 to 15 minute appointment with the doctor, which is why they are turning to less trusted channels of information.

*“A very important function of a doctor is to help a patient put things in perspective, but when a patient turns to Google, their mouth ulcer quickly becomes a potential cancerous lesion,” he explained. “So while Google often has up-to-date and accurate information, the patient typically lacks the ability to interpret and contextualise the information. When the information they receive from Google is at odds with the doctor’s advice, they may readily seek out a second opinion. Patients may believe that the doctor isn’t telling them everything which can potentially be resolved by providing the patient with fact sheets or links to valuable resources, which are informative and understandable.”*

Dr Middleton agrees, but stresses while it’s important to offer patients the information they need, it’s not necessarily a time to ‘reinvent the wheel.

*“Doctors need to be a trusted source of information, but it’s not practical to necessarily have all that information on the doctor’s or practice website ” she explained. “Rather, the website can redirect patients to good quality, evidence-based resources and information that the doctor trusts.”*



*“If the website doesn’t provide this kind of information, the doctor should have these resources close at hand and be able to provide it to the patient during the consultation - for example by using factsheets.”*

Despite having an appetite to know more about their health, most patients are also walking away from their consultations empty-handed. Other than face-to-face consultations, 88% of respondents said they didn’t receive any other additional health education from the GP since their last consultation. Alarming, a meagre 16% of patients who rate their health as poor or very poor say that they received additional health information or resources from the GP.

For Dr Hurst, the research finding about doctors doing a poor job of providing patients with extra information beyond doctor’s advice is a big concern, especially given patients’ inadequate retention of health information post-consult is widely documented.

*“The finding that 88% of patients report getting no information beyond the doctor’s advice is problematic as it suggests that doctors likely overestimate their patients’ retention of information and underestimate the value of supporting information such as fact sheets or links to valuable online content,” he said. “In fact, 40 to 80% of information is forgotten immediately by the patient, which may be exacerbated further by factors such as ageing, cognitive deficit or anxiety. And poor recall of information is a major cause of non-adherence in patients.”*

Meanwhile, 90% of patients say they would have liked a printed fact sheet explaining their condition in more detail and how to manage it. Another 42% say they would like a follow-up email from the GPs. These results demonstrate that there is a significant gap between the education patients expect from their GP, and what GPs are currently providing.

*“Providing written information (such as a factsheet), as part of the consultation can significantly help improve people’s understanding of their condition and how to manage it ,” Dr Middleton said. “This, in turn, has a huge impact on patient compliance, understanding, satisfaction and health outcomes. Many of MedicalDirectors’ partners can help with providing this information.”*





### Patients want more from their GPs than Dr Google:

- 90%** Want a fact sheet from their GP explaining their condition and how to better manage it
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## 7. Conclusion: A patient-centric future

Moving forward, a patient-centric approach that leverages the right technology is essential in healthcare to establish better communication channels between practitioners, patients, and their families, in order to align healthcare decisions to deliver better patient outcomes. Patient-centricity also implies more education and support for patients to make empowered health decisions and participate in their own care.

*“We need to transform every step of the patient journey, with a more patient-centric approach,” Dr Middleton said. “From booking to follow-up, many solutions exist to keep the patient engaged with the doctor, and informed through reliable, evidence-based resources.. This should be part of every practice’s management plan.”*

*Ideally, I’d like to be able to type out their diagnosis and management plan in their progress notes, and it instantly populates onto the patient’s phone with a number of links to relevant resources about their condition. That would be my ideal.*

*The amount of time I currently spend handwriting plans like this, would be far better spent engaging with my patients more seamlessly, using technology in innovative and efficient ways.”*

While there is a growing appetite for more digital services in healthcare, we also need to have a wider ecosystem that supports innovation in a safe and secure way, and keep data security, privacy and patient confidentiality at the top of mind.

*“This consumer appetite for more technology in healthcare is encouraging, but we need to balance that with appropriate solutions and security so we keep innovating in a risk-free environment,” Bardsley said. “Effective technology adoption in healthcare requires wider, more broader policies and a robust, secure infrastructure, which is why MedicalDirector works closely with industry stakeholders, the Government and partners to enable that ideal.”*

The research clearly shows that healthcare organisations need to focus more on personalisation and make information such as factsheets and resources readily available to each individual patient, which is why MedicalDirector also takes the time to partner with the right solution providers to enable this ideal.

“At MedicalDirector, we understand this pressing need to offer more resources to patients, that’s why we offer factsheets and enable better communication between the patient and the doctor,” Bardsley said. “Moving forward, we see a future where we can deliver some of that knowledge directly to the consumer. And the more we contextualise that information, and make it relevant to the patient, the better. It’s something we continue to actively work on with our partners.”

### About MedicalDirector

MedicalDirector is Australia’s leading medical software and information provider; processing over 70 million patient consultations every year across its large growing network of doctors and medical professionals.

For over 20 years, the company has developed solutions to support healthcare professionals through quality, evidence-based software tools at the point of care. Over 17,000 health professionals use MedicalDirector platforms to process millions of patient consultations every week.

From electronic health records, patient management, billing, scheduling, care coordination, medicines information to population health management services, MedicalDirector’s secure platforms provide innovative and easy-to-use solutions to enable ideal healthcare across Australia.

See more at: [medicaldirector.com](http://medicaldirector.com)

### About HotDoc

HotDoc is a Patient Engagement Platform founded in 2012 by Dr Ben Hurst, who saw the opportunity to streamline how GPs and patients communicate health information. Today HotDoc has over 9,000 doctors using the platform ranging from solo GPs to some of Australia’s largest medical groups, including IPN, Fullerton Health and Primary Health Care.

We help practices improve the depth of their relationships with patients and improve practice efficiency through tools like online appointments, SMART Recalls, Reminders, Inform and Check-In.

See more at: [medicaldirector.com/marketplace/hotdoc](http://medicaldirector.com/marketplace/hotdoc)

### About the Experts



**Matt Bardsley**  
MedicalDirector CEO

Matthew is the Chief Executive Officer at MedicalDirector and is based in Sydney. In this role, he has led, developed and grown the MedicalDirector businesses to support many aspects of healthcare, including general practice, pathology, radiology and population health.

With over 20 years of technology and software development experience, 15 of which have been in health, Matthew began his career as a computer programmer at satellite imaging company, Earth Resource Mapping. He then developed a picture archiving and communication system (PACS), a medical imaging technology used in radiology. In 1999, at just 26, he founded medical software company Digital Diagnostic Imaging (DDI) Health, which still provides digital solutions for accessing high-quality diagnostic images of patients today. Prior to MedicalDirector, Matthew worked with Primary Health Care, where he was Chief Information Officer for fifteen years.



**Dr Charlotte Middleton**  
BMBS, Dip CH, FRACGP,  
GP and Chief Medical Advisor at MedicalDirector

A GP with 20 years’ clinical experience, Dr Charlotte practices integrative medicine with a focus on preventative health. Increasingly interested in the role technology could play in the provision of healthcare services, Charlotte worked as the Medical Director at Healthshare between 2015 and 2017, before taking her current role at MedicalDirector as their Chief Clinical Advisor.

Passionate about health education and a keen TV presenter, Charlotte has appeared in many educational videos and is frequently a guest speaker at media and corporate events.



**Dr Ben Hurst**  
HotDoc CEO and Founder

Ben’s career has zigzagged from ED resident to prison psychiatrist, New York novelist, and most recently CEO of HotDoc, a Melbourne based, healthtech company. The beginnings of HotDoc can be traced back to Ben’s family dinner table where he came to learn the tales and travails of medicine through his father (an ENT) and his mother (a GP). Through their experiences and his own, he decided to found a company that helped doctors build more meaningful and lasting relationships with their patients.

