



Health Care & Insurance – Australia 2007

“Through the consumer’s eyes”

The Ipsos Health Care & Insurance Australia Report is a comprehensive consumer based review of the public and private health industry in Australia.

Known in the health sector as “The Bible”, after 20 years it has an unrivalled depth and breadth of issues covered, making it an indispensable research tool used by health policy, marketing and insurance managers at all levels to inform their strategic decision making.

Each publication is based on over 5,000 interviews of Australians with and without private health cover. The survey sample is representative of the population both geographically and demographically. The research is conducted by phone in the winter of every odd-numbered year; the next is scheduled for August 2007 with the report released at the end of October 2007.

The report is broken into easy-to-read sections and comes in hardcopy plus a quick search electronic PDF version.

Among the many issues featured the report provides invaluable and highly accessible information (perception and actual) about:

- confidence in public hospital system and preference between public and private hospitals.
- which provides better quality of care – public or private hospitals?
- patient satisfaction – public vs private hospitals; concerns and complaints.
- attitudes towards obtaining care out of hospital for usually inpatient services; **NEW in 2007**
- ratings of specialists and doctors;
- the rating of Medicare;
- the community impact of the current accessibility of mental health services;
- gaps and informed financial consent (IFC)– Have there really been any improvements? The extent of and perceptions of who’s responsible for out of pocket expenses. Who should fix it?;
- consumer attitudes – PHI value perceptions and drivers;
- perceptual maps of major funds;
- ‘shop around’ and fund-switching behaviour.





- market trends – consumer segments likely to purchase health cover, effect of interest rates and rate rises, government incentives; **Some NEW content in 2007**
- distribution channels and intermediaries; preferred, use, role of the web. **Some NEW content in 2007**
- market consolidation and public listing – do members care if their funds merge to form larger ones or list on the stock exchange? **NEW in 2007**
- value drivers – price vs benefits, what is important? Do members want membership benefits other than plain hospitals and extras cover?
- advocacy - referral propensity/advocacy by segment and fund (where sample permits) **NEW in 2007**
- consumer ratings of the public vs private hospital sector - What is the value proposition of each form of care as perceived by non-users and recently hospitalised patients both insured and uninsured?
- price elasticity of demand – how much will the consumer bear? Breaking points;
- utilization of the public and private health systems; and
- the value of natural therapies; use.

Plus many more issues covered...

A number of measures 'track back' several years, some as far back as 1987 when the survey began, making it a rich source of information and emerging trends in the industry.

Information is analysed and presented in a number of ways, mainly by state, regional versus metro and segments based on lifestyle.

The authors of the report have had many years of experience in the health industry and are considered experts in their field. This is why the report is actually referred to as "The Bible" and is used extensively as a reference text by governments (state and federal), private health insurance funds and industry associations such as the Australian Health Services Alliance (AHSa) and the Australian Health Insurance association (AHIA). Subscribers represent around 95% of the privately insured population.

