



What do Australians think about Health & Medical Research?

2013 Opinion Poll - views of 1000 Australians

Contents

| | |
|--|----|
| Foreword | 03 |
| Executive summary..... | 04 |
| About Research Australia | 05 |
| Acknowledgements | 06 |
| Copyright..... | 06 |
| Research methodology..... | 06 |
| Government support for health and medical research | 07 |
| What are our top priorities for the Federal Government? | 08 |
| How do other issues rate this year?..... | 09 |
| More funding for health and medical research remains important to Australians | 10 |
| Health and medical research is important to the Australian economy | 11 |
| A strong health and medical research industry is very important..... | 12 |
| The nature of health and medical research | 13 |
| We value all types of health and medical research - including wellness..... | 14 |
| Junk food - to tax, or not to tax? | 15 |
| We think research can help manage healthcare costs..... | 16 |
| We are willing for our health records to be used for research | 17 |
| Philanthropy for health and medical research | 18 |
| Not even half of us make a donation per year to health and medical research | 19 |
| Tax deductions for donations are only claimed a little more than half the time..... | 20 |
| Personal experience is why many donate to health and medical research | 21 |
| All areas of research are important for donations..... | 22 |
| Differences among donors | 23 |
| Why we don't donate to health and medical research..... | 24 |
| Nearly half of us think we probably should donate more to health and medical research..... | 25 |
| Research Australia's 10 Strategic Imperatives 2012 - 2020 | 26 |
| Major Partners of Research Australia | 27 |

Foreword

Research Australia has been conducting opinion polling of the general public since 2003 to monitor attitudes to health and medical research.

We value the role a well-informed community performs in shaping the research priorities of governments and the research sector. A community that understands health and medical research is able to better support the research endeavour and make the most of the opportunities research provides for better health outcomes. Our annual opinion polling provides an opportunity to gauge changes in the community's understanding and support of health and medical research.

Research Australia believes that without further expansion and improvement in health and medical research in Australia, we will be unable to meet the challenges of an ageing population and the growing incidence of chronic disease. In 2012 we launched our policy platform *10 Strategic Imperatives 2012-2020* which outlines how health and medical research can contribute to more effective, efficient and sustainable healthcare.

The results of the polling reflect many of these imperatives, including:

- *Fund the full cost of research*
- *Encourage commercial investment in R&D*
- *Foster philanthropy*
- *Develop implementation science- turning evidence into action*
- *An empowered and informed community.*

A full list of the *Strategic Imperatives* is provided at the back of this report.

We are pleased to present this year's findings, where we have identified both some attitudes that have changed and some that have remained remarkably consistent since we started polling a decade ago in 2003.



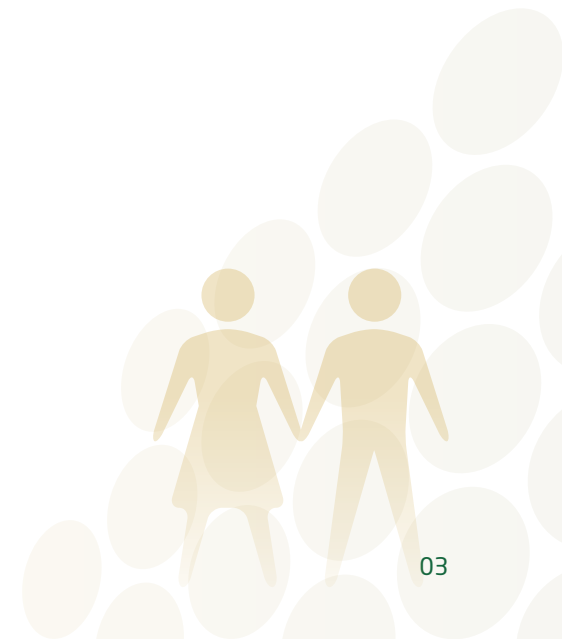
A handwritten signature in black ink that reads "Elizabeth Foley".

Elizabeth Foley, Managing Director



A handwritten signature in black ink that reads "Christine Bennett".

Christine Bennett, Chair



Executive summary

This year's opinion polling was undertaken in June, and our standard question about 'what priorities the Federal Government should be focusing on over the next 2-3 years' provides an interesting backdrop to the impending election.

Three significant health issues remain in Australian's top 10 priorities for the Government:

- improving the hospital and healthcare system remains the number 1 priority,
- more funding for health and medical research is equal 6th and
- increasing funding and programs for preventative health care is equal 8th.

This year more funding for health and medical research has moved up the rankings from 9th priority in 2012.

Australians think health and medical research is important to the economy, which reflects the \$5.5 billion spent in the sector each year, and its workforce of 22,000.

Australians value a wide range of research, from basic research resulting in new discoveries, to translational research, which turns new discoveries into treatments, devices, policies and new practices. 59% of Australians see health and medical research as part of the solution to rising health care costs.

Interestingly, in the 'post penicillin discovery' era, where some of the greatest killers are 'lifestyle' diseases, the polling shows significantly more women than men are in favour of research into lifestyle changes that can improve health. This bias also translated through to preparedness to donate to this type of research. Also on the lifestyle issue, 53% of Australians would support the introduction of a fat or sugar tax if the proceeds of the tax were used to fund programs to reduce the damaging health effects associated with consuming foods with high fat and/or sugar content.

On the at times contentious issue of access to a person's health records for research purposes, policymakers should note that nearly 80% of Australians are happy to have their records used in this way. This is significantly higher than the level in the USA where only 66% were willing to have their records accessed for research, and augurs well for leveraging the new e-Health system.

While data is limited, Research Australia estimates that at least \$200 million per year is received by Australian health and medical researchers from Australian and overseas donors. Fundraisers have stated that 2013 has been a particularly difficult year, and this is supported by our polling results. Only 43% of people surveyed indicated that they make one or more donations per year to health and medical research, down a significant 8% on 2012, where the proportion was 51%. The biggest change was where people were making donations under \$100. The most important reason cited for not donating was 'I can't afford it'. On a more positive note, nearly half of Australians (47%) think they should donate more to health and medical research.

About Research Australia

Research Australia is an alliance of 160 members and supporters advocating for health and medical research in Australia. Research Australia's activities are funded by its members, donors and supporters from leading research organisations, academic institutions, philanthropy, community special interest groups, peak industry bodies, biotechnology and pharmaceutical companies, small businesses and corporate Australia. It reflects the views of its diverse membership and represents the interests of the broader community.

Research Australia's mission is to make health and medical research a higher priority for the nation, and we have four goals that support this mission.



Acknowledgements



Australian Government

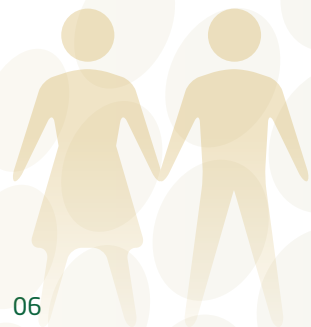
Department of Health and Ageing

This public opinion polling was supported by funding from the Australian Government under the Health System Capacity Development Fund.

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The report is available on the Research Australia website at www.researchaustralia.org



Research methodology

The survey was conducted on behalf of Research Australia by Enterprise Marketing and Research Services Pty. Ltd. (EMRS).

EMRS used its online research capability to collect the data. A secure link was sent to an online panel who invited Australians to participate in the online survey.

1,000 Australian residents aged 18 years and over participated in the online survey. To ensure that the sample was representative of a cross-section of Australians, quotas were assigned for age, gender, and location. Where quotas were not achieved the data was weighted to the latest ABS census information 2011.

Results have been compared to previous research where relevant.



The opinion polling was undertaken on behalf of Research Australia by Enterprise Marketing and Research Services (EMRS)

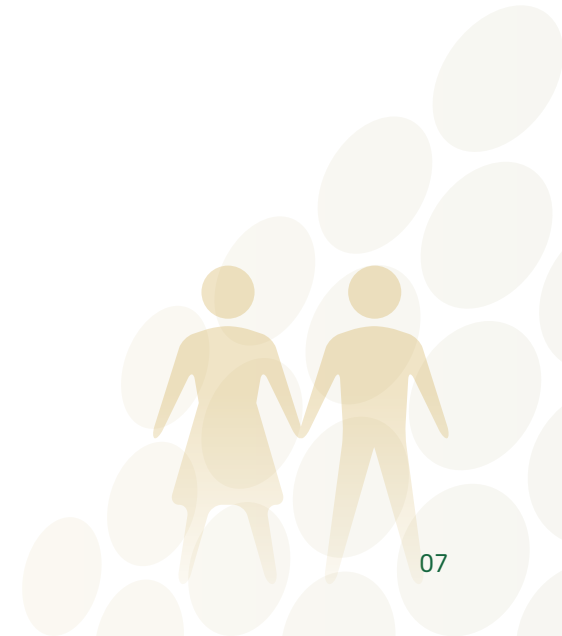
Government support for health and medical research

The Australian Government faces demands from all sectors of the Australian community to fund a diverse range of services and activities, including health and education, the provision of pensions, defence and border protection, and the provision of infrastructure. At the same time, Government spending is constrained by pressure to reduce taxes, and concern about public debt.

Australian health and medical research is largely government funded, with the Australian Government providing more than \$3 billion in support each year.

The Strategic Review of Health and Medical Research conducted for the Australian Government last year has called for an increased investment by the Australian Government in health and medical research. Part of the rationale for this increased investment is to improve our healthcare system and ensure its sustainability.

Clearly any increased expenditure on health and medical research has to be weighed against other priorities for funding. So where, in an election year, does the Australian public rate increased funding for health and medical research as a priority for Government funding?



What are our top priorities for the Federal Government?

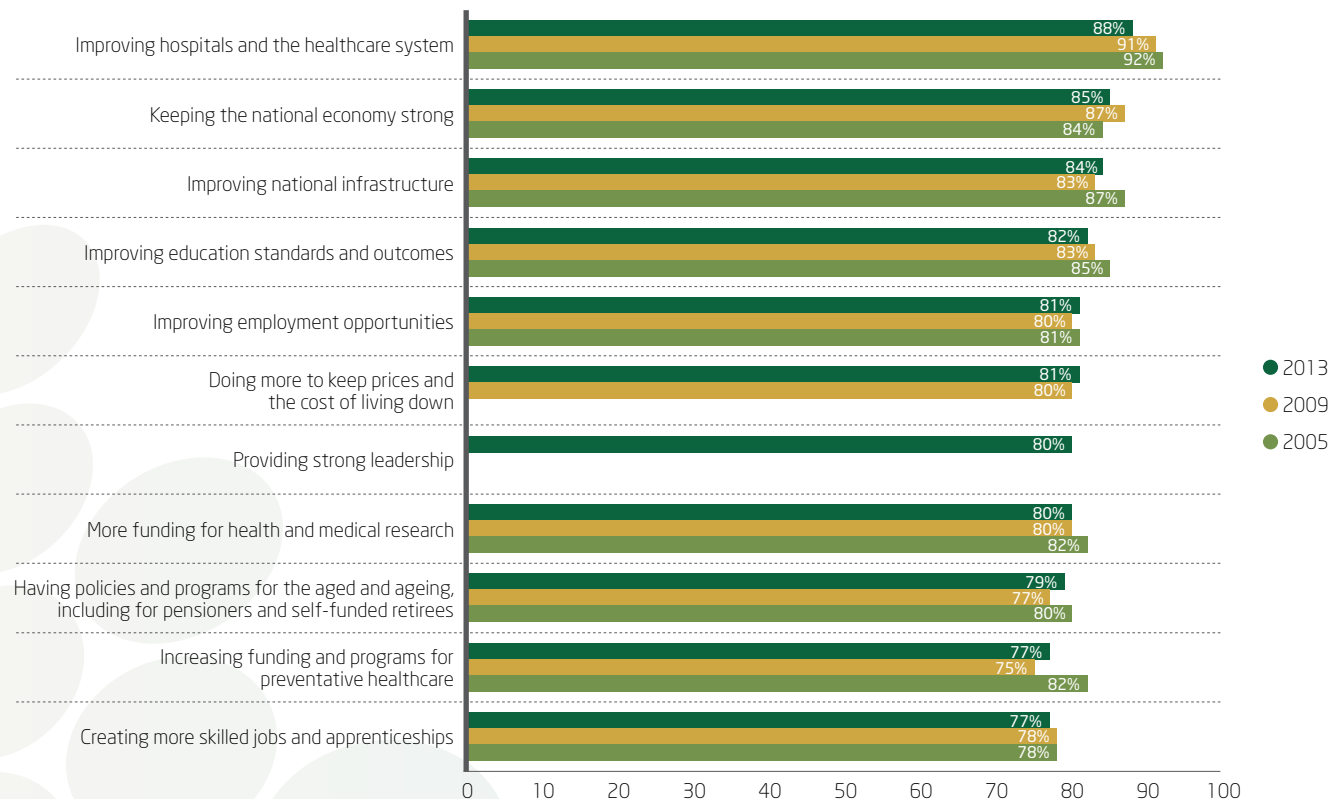
Question detailed on next page. Base: All respondents n=1000

- **Improving Hospitals and the Healthcare System remains No 1**
- **More funding for Health and Medical Research moves up to equal 6th**
- **Increasing funding and programs for Preventative Healthcare is equal 8th**

Looking after Australians' health features in 3 of our top priorities for 2013. 88% of respondents gave 'Improving Hospitals and the healthcare system' a rating of 7 or more, the highest of all the listed priorities. (For the purposes of analysis, a score of 7 or more on a scale of 0 to 10 is considered to be a rating of 'Important' to 'Extremely Important'.) The ranking is consistent with Research Australia's polling over previous years, in which this has been the highest priority of an extensive list of issues, although the score is a little lower than in recent years. This year's results are compared to the 2005 and 2009 surveys in the table below, and reflect fairly consistent priorities over that period.

'More Funding for Health and Medical Research' is the equal 6th priority, together with 'Providing Strong Leadership'. 'Increasing Funding and Programs for Preventative Health' care is the equal 8th priority, with Skilled Job Creation.

Highest priorities



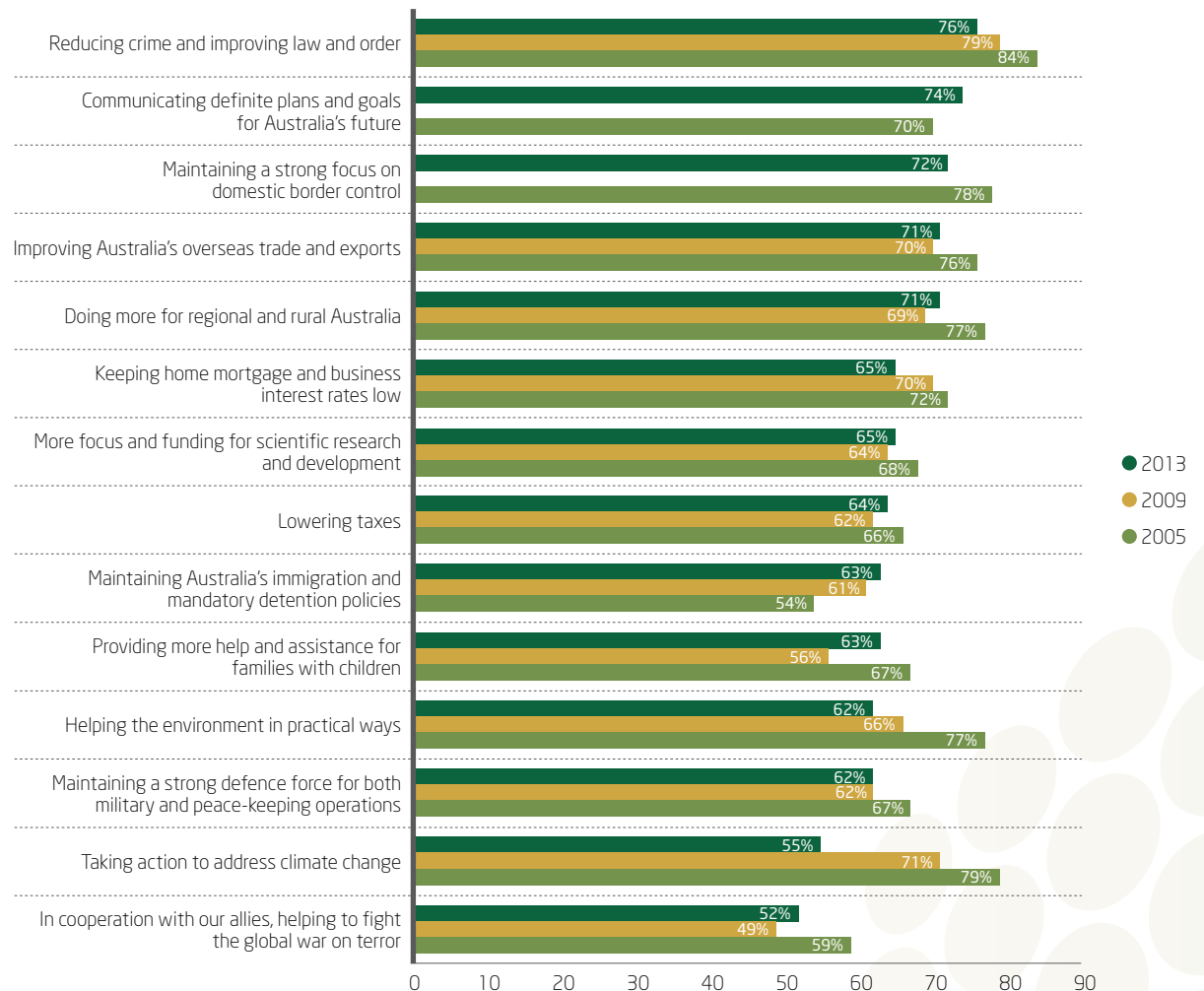
How do other issues rate this year?

Australians rate 'More Focus and Funding for Scientific R&D' ahead of 'Lowering Taxes', 'Maintaining Mandatory Detention Policies' and helping the environment.

Q: Firstly, please think about what priorities you think the Federal Government should be focusing on over the next 2-3 years. As you read through the following list of issues, please rate how important you personally think each issue is, as a priority for the Federal Government to be focusing on over the next 2-3 years. Please use a 0 to 10 scale where a 0 means that it is not important up to a 10 that means it is extremely important or a critical priority for the Federal Government to be focusing on over the next 2-3 years.

Base: All respondents n=1000 (not all priorities have been rated in all years).

Other priorities



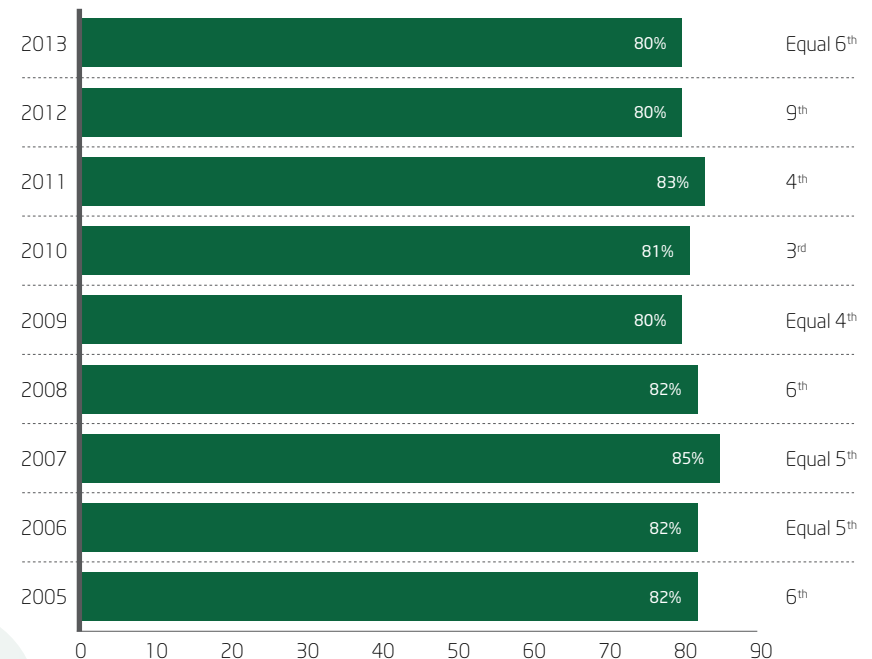
More funding for health and medical research remains important to Australians

More funding for health and medical research remains a high priority for Commonwealth Government funding. In this year's survey, 80% of respondents gave 'More funding for health and medical research' a rating of 7 or more. (A score of 7 or more on a scale of 0 to 10 is considered to be a rating of Important to Extremely Important.). Research Australia has asked this question in many of its previous annual surveys and the results have been very consistent, as shown in the table below.

In 2013 'More funding for health and medical research' is the equal 6th priority in a list of 25 issues, 3 places higher than in 2012. The priority assigned to this item has varied between 3rd and 9th over past surveys.

Q: see previous page.

More funding for health and medical research is important



Research Australia has sister organisations in the USA, Canada and Sweden. In polling conducted by Research Sweden in 2012, 92% of Swedes indicated that increased investment in health and medical research by the Swedish Government was 'Very Important' or 'Quite Important'.

Health and medical research is important to the Australian economy

Approximately \$5.5 billion per year is spent on health and medical research in Australia, and it directly employs approximately 22,000 people, including researchers, technicians and other administrative and managerial roles. A further 12,600 postgraduate students are engaged in health and medical research at our universities and medical research institutes.

Australian health and medical research workforce¹

| | Higher Education (2010) | Private Non- Profit (2011-12) | Business (2009-10) | Government (2011-12) | Total | % |
|---------------------------------------|----------------------------|----------------------------------|-----------------------|-------------------------|---------------|-------------|
| Researchers | 6799 | 2844 | 2238 | 1740 | 13,621 | 39.4 |
| Technicians | N/A | 1100 | 1452 | 1122 | 3,674 | 10.6 |
| Other Staff | 2745 | 695 | 734 | 490 | 4,664 | 13.5 |
| Postgraduate students | 12600 | N/A | N/A | N/A | 12,600 | 36.5 |
| Total Health R&D workforce | 22144 | 4639 | 4424 | 3352 | 34,559 | 100 |

Equally importantly, health and medical research supports Australia's biotechnology and pharmaceutical industries. Australia's pharmaceutical and biotechnology industries spend more than \$1.2 billion on research and development. This spending directly supports a sophisticated Australian manufacturing industry in pharmaceuticals, biotechnology and medical devices with exports of more than \$4 billion in 2011-12. Australian manufacturers who rely on health and medical research for their success include Cochlear Ltd (the bionic ear), ResMed (respiratory devices) and CSL (medicines and vaccines).

¹Australian Bureau of Statistics; Reports of Research and Experimental Development, various.

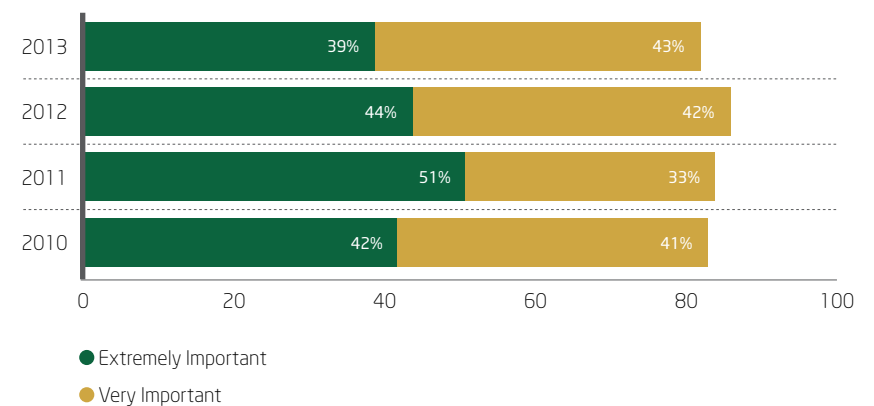
A strong health and medical research industry is very important

Australians recognise the importance to Australia of a strong health and medical research industry. 82% of respondents reported that a strong health and medical research industry is 'Extremely Important' or 'Very Important' to Australia. This response is consistent with the other three years in which this question has been asked.

Q: Thinking specifically about the health and medical research industry. How important do you think it is for Australia to have a strong health and medical research industry - extremely important, very important, moderately important, not very important or not at all important?

*Base: All respondents
n=1000*

The importance of a strong health and medical research industry



The nature of health and medical research

Modern health and medical research is a complex, sophisticated and global endeavour. It requires collaboration between researchers in their own areas of specialisation in Australia and internationally. It draws on expertise from a range of disciplines, including mathematics and engineering as well as the traditional life sciences.

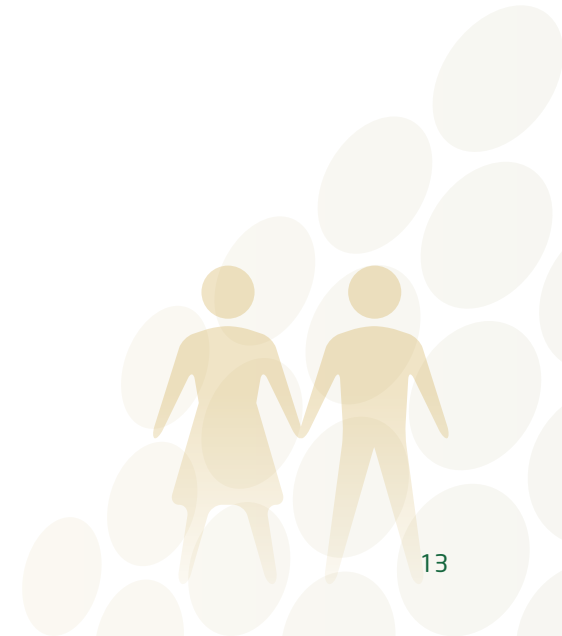
To derive the greatest benefit we need to:

- make new discoveries about human health and disease;
- turn those discoveries into new drugs and treatments;
- deliver new drugs and treatments safely and in a way that promotes the rapid and comprehensive adoption of evidence based practice;
- improve the efficiency of our health system to restrain costs and ensure its long term sustainability; and
- understand the changes to our lifestyle that will promote better health, and the means by which these can be most effectively achieved.

Research is critical to all these endeavours. Health and medical research today encompasses a range of different activities, some of which are far removed from the traditional idea of laboratories, microscopes and test tubes. Do Australians understand and value the range of activities that fall under the broad heading of health and medical research?

And research isn't just something that happens 'out there', divorced from the wider community. It requires the support of individuals, through:

- a willingness to have their taxes used to fund research
- donations to research
- participation in clinical trials; and
- the contribution of data from health records.



We value all types of health and medical research - including wellness

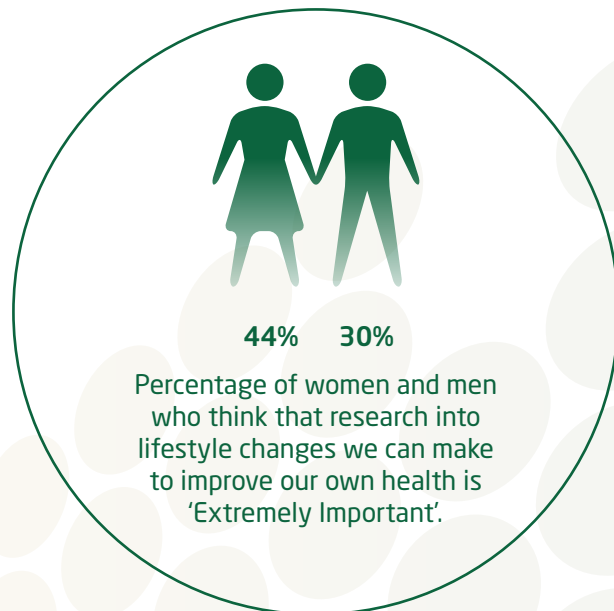
While the traditional view of health and medical research might be the lone scientist in her or his laboratory, the modern reality is very different. It involves making new discoveries, the development of new drugs and treatments, research to improve the quality and delivery of healthcare, and research into changes we can make to improve our own health.

Respondents were asked to rank the importance of these different types of research. The results indicate that Australian have a sophisticated understanding of the importance of the different types of research in the journey from discovery to improved health. Interestingly for preventative and wellness research 78% of respondents rated research into ways they could improve their own health as 'Extremely Important' or 'Very Important'. While a slightly lower score than the other three, the difference was largely due to significantly less enthusiasm from men for research into lifestyle changes. Perhaps it sounds too hard!

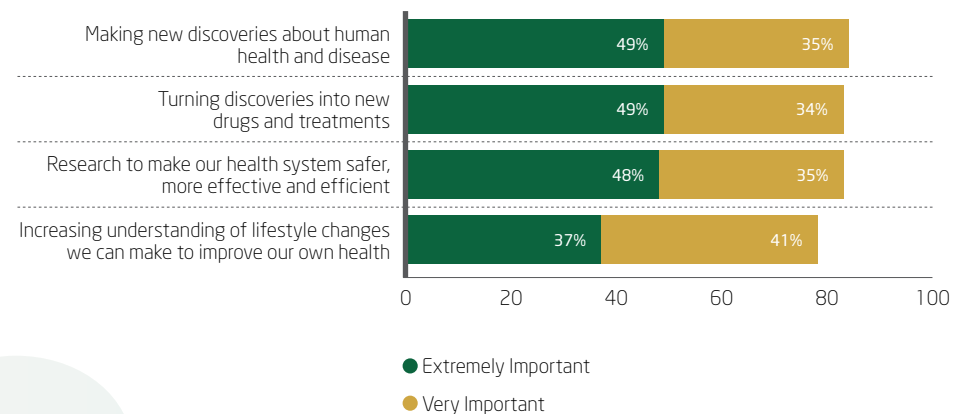
Q: Please rate the importance of research in the following areas.

- Making new discoveries about human health and disease
- Turning discoveries into new drugs and treatments
- Research to make our health system safer, more effective and efficient
- Increasing understanding of lifestyle changes we can make to improve our own health.

Base: n= 1000



Support for different types of research



Junk food - to tax, or not to tax?

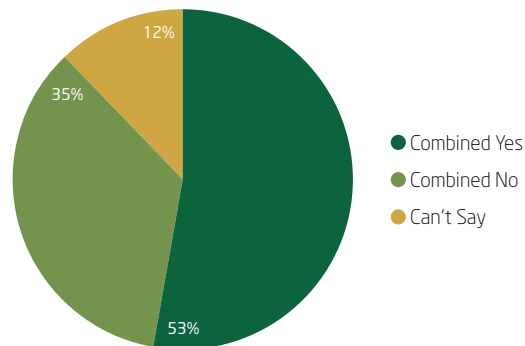
There is an increasing focus around the world on 'lifestyle' diseases, and public health measures to address them. A number of developed countries around the world have responded to increasing levels of obesity by proposing or introducing a tax on foods that are high in sugar and/or fat, although the Global Financial Crisis has caused some to reconsider.

More than half of respondents (53%) indicated they would support such a tax if the revenue it generated was used to fund programs to reduce the damaging health effects, such as obesity. Without a commitment to use the revenue in this way, overall support falls to 46%.

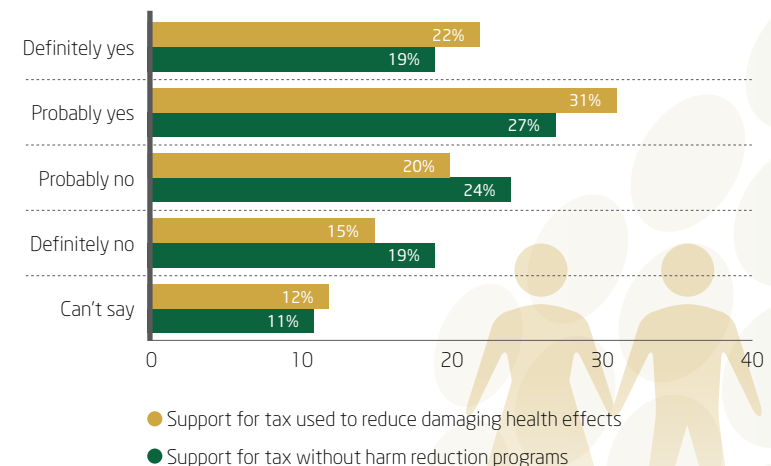
Q: Partly to reduce consumption and the damaging health effects and costs, the Australian Government currently imposes high taxes on products such as tobacco and alcohol. Would you support a tax on foods with high levels of sugar or fat?

Support for a tax on sugar and fat used to reduce the damaging health effects

Q: Would you be more likely to support such a tax if the revenues raised were used to fund programs to reduce the damaging health effects associated with consuming too much food with high levels of sugar or fat?
Base: All respondents n=1000



Support falls if the revenue raised is not dedicated to harm reduction programs



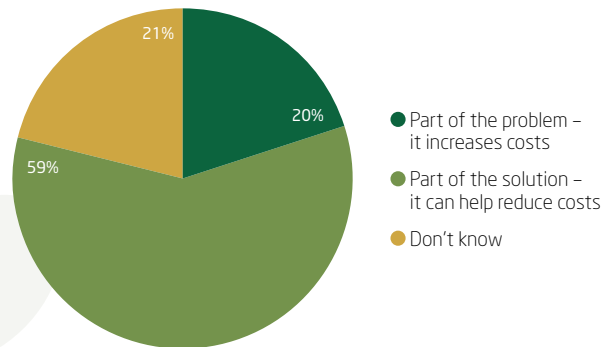
We think research can help manage healthcare costs

The Strategic Review of Health and Medical Research conducted for the Australian Government last year has called for an increased investment in Australian health and medical research to help improve our healthcare system and reduce the future cost of healthcare. Most Australians agree with the Review's authors that health and medical research can reduce the costs of healthcare. The greatest level of support comes from people over the age of 55, perhaps because of the advances in healthcare that they have seen over the course of their lives.

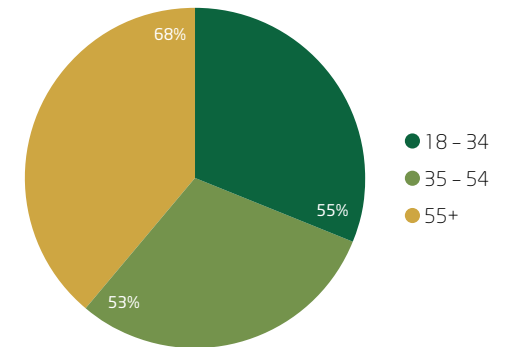
Q: When it comes to rising healthcare costs, do you think that research to improve health is part of the problem because it will increase costs or part of the solution as it will help reduce costs?

Base: n= 1000

Research is part of the solution to rising healthcare costs



Research is part of the solution - by age group



Research Australia has sister organisations in the USA, Canada and Sweden. Research Canada asked the same question of Canadians in 2012; 54% of Canadians believe that health and medical research is part of the solution to rising healthcare costs. Also last year, a similar (but not identical) question was asked by Research!America, with 57% of Americans responding that health and medical research is 'Very Important' to reducing healthcare costs.

We are willing for our health records to be used for research

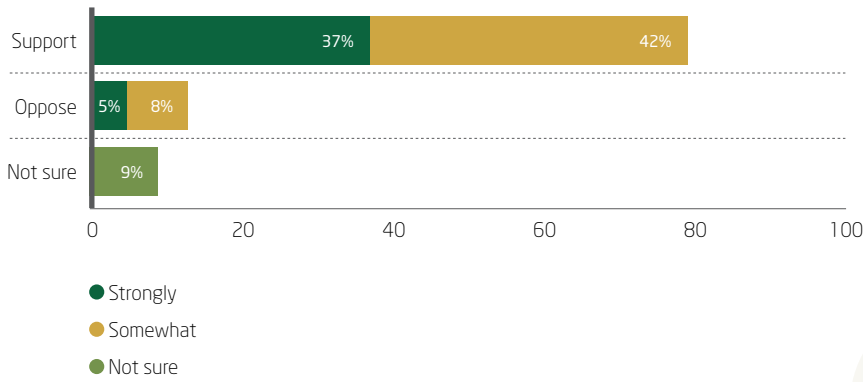
Information that is collected about us each time we visit a hospital, the doctor or other health professionals can be useful to health and medical researchers. It can assist the identification of links between different conditions, the effectiveness of new treatments, and the prevalence of different health problems in the community. The polling showed the overwhelming majority of Australians are supportive of their medical records and information being used for this purpose.

Q: Information about us is collected each time we go to the doctor, a hospital, the dentist, physiotherapists and other health professionals. This information can be useful to health and medical researchers. For example, it can help in understanding links between different medical conditions, or in assessing the effectiveness of new treatments.

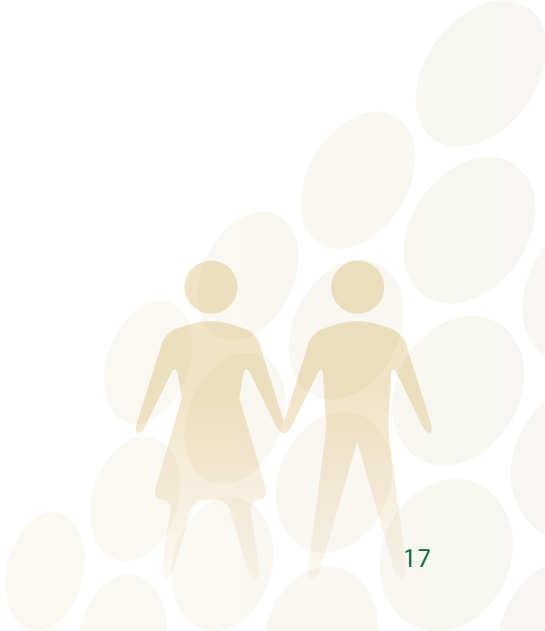
Do you support the use of patients' medical records for research purposes?

Base: n= 1000

Support for the use of patients' medical records for research purposes



Research Australia's sister organisation in the USA, Research!America, asked a similar (but not identical) question in 2012, which found 66% of Americans were willing to share personal health information to advance medical research.



Philanthropy for health and medical research

Philanthropy plays an important part in funding Australian health and medical research. While data is limited, Research Australia estimates that at least \$200 million per year is received by Australian health and medical researchers from Australian and overseas donors.

Philanthropy has contributed to significant medical advances in the past. In the middle of last century, the Rockefeller Foundation supported Howard Florey's development of penicillin. More recently, the Clive & Vera Ramaciotti Foundation was one of many to help fund the development of the cochlear implant, and the Ian Potter Foundation and John T Reid Charitable Trusts have been major funders of the initial 'blue sky' research into bionic vision. Corporate philanthropy has also been important. The Colonial Foundation has played a pivotal role in the Orygen Youth Health Research Centre, Australia's largest youth mental health research centre. Since its inception, the Bupa Foundation has committed approximately \$19 million to the generation of new ideas and approaches to improve the health of Australians.

Of course most donations are not on this scale and the bulk of donations come from ordinary Australians contributing much smaller individual sums.

Research Australia is keen to understand more about:

- who donates to health and medical research (and how much);
- what motivates them to do so; and
- what reasons people have for not donating.

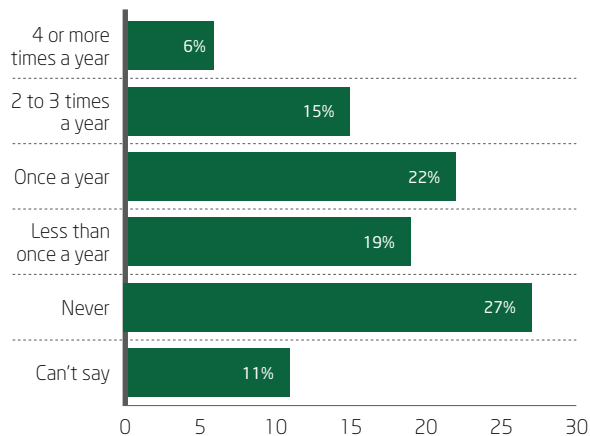
This prompted us to include a series of questions about philanthropy in the 2013 opinion poll. The responses to these questions build on the questions we have asked in previous polls and help to further our understanding of this important area.

Not even half of us make a donation per year to health and medical research

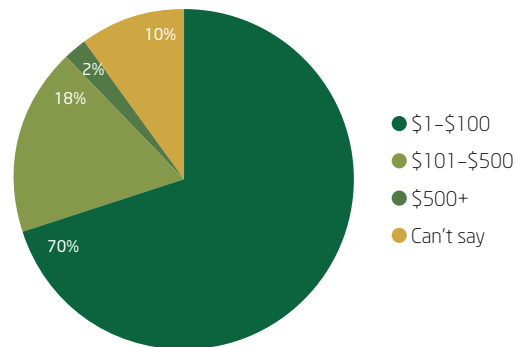
Only 43% of all the people surveyed indicated that they make at least one donation per year to health and medical research, down on 2012, where the proportion was 51%. A further 19% indicated that they donate on a less frequent basis.

Among those who donate at least annually to health and medical research, the largest proportion of donations are \$1-100 per year. Only 2% of donations to health and medical research are more than \$500 per year.

How often do you donate to health and medical research?



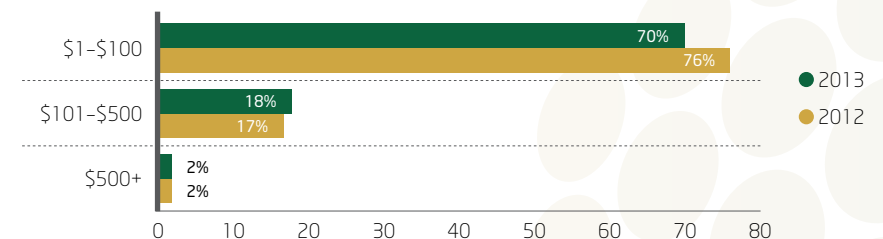
Amounts donated by people who donate at least annually



Q: Thinking now specifically about funding for health and medical research in Australia. About how often do you personally donate money to health and medical research?
Base: 1000

Q: And, on average, about how much money in total each year would you donate to health and medical research?
Base: Respondents who donate to health and medical research at least annually: 433

Amounts donated by people who donate at least annually - compared to 2012

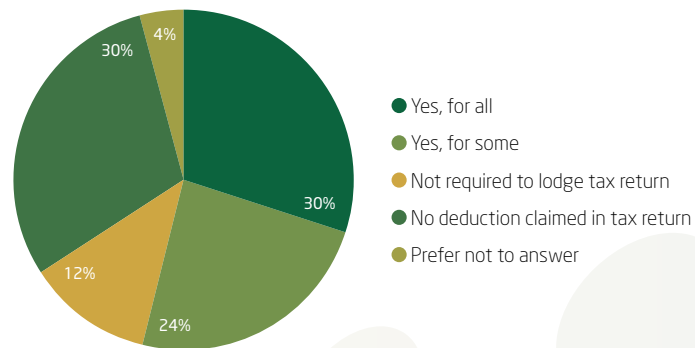


The greatest difference in the responses to the second question compared to 2012 relates to the number of people making donations of \$1 to \$100. Last year, 76% of respondents who donated at least annually to health and medical research contributed \$1-100 per year, compared to 70% in this survey.

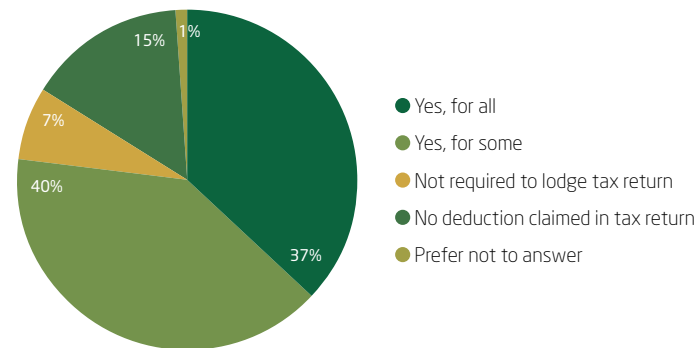
Tax deductions for donations are only claimed a little more than half the time

54% of Australians who make one or more donation to health and medical research annually claim a tax deduction for some or all of those donations. The likelihood of claiming a tax deduction increases with the size of the total donations made, with 77% of individuals who donate more than \$100 per annum to health and medical research claiming a donation for some or all donations.

Tax deduction claimed for donations to health and medical research



Tax deductions claimed for annual donations greater than \$100



- Q: Do you claim a tax deduction for your donations?
1. Yes, for all
 2. Yes, for some
 3. I am not required to lodge a tax return
 4. No
 5. Prefer not to answer

Base: Respondents who donate at least annually to health and medical research: 433

This finding is important because information about donations is difficult to obtain. Many estimates are based on ATO statistics, which only record donations for a which a deduction is claimed.

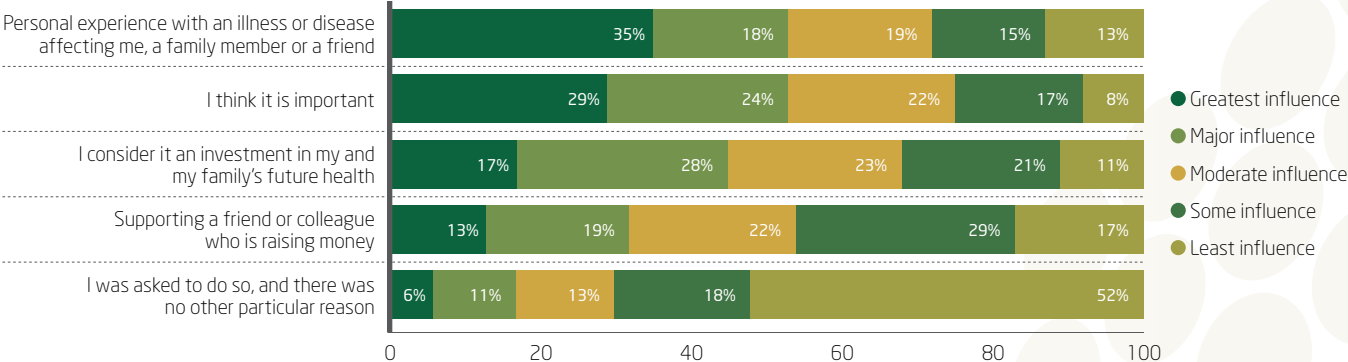
Personal experience is why many donate to health and medical research

Respondents who contributed to health and medical research were provided with seven possible reasons for doing so, and asked to indicate how influential each of these reasons were. The results are shown below.

Personal experience with illness or disease is the strongest motivation for donating to health and medical research, and people are more likely to donate because they consider it is important than because of other factors, such as being asked to donate or supporting a friend’s fundraising effort.

*Q: Please rank the following factors from 1 to 5 in order of how much influence they have on your decision to donate to health and medical research, 1 being the biggest influence to 5 having the least influence on your decision.
Base: respondents who have donated to health and medical research: 738*

Reasons for donating to H&MR

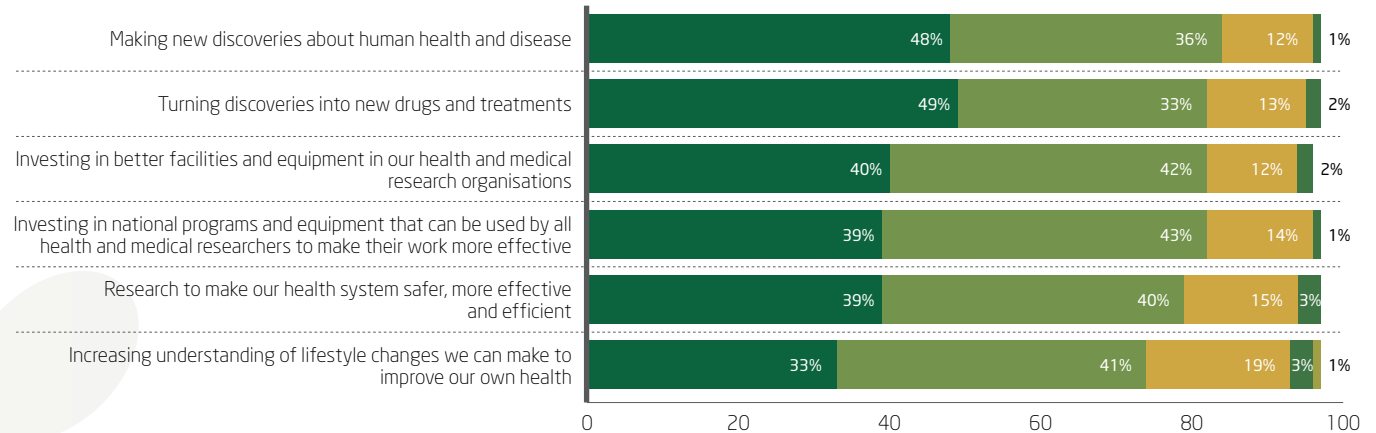


All areas of research are important for donations

There are many different ways that donations can support health and medical research, and Australians consider all of them to be important, with over 80% of respondents scoring the top four purposes as 'Extremely Important' or 'Very Important'. The remaining two received scores of between 70 and 80%. This is consistent with the response to the question on page 14 which asked respondents to rate the importance of four different types of research, and found broad support for all four.

Areas of research supported with donations

*Q: Please indicate how important you think each of the following areas for donations are.
Base: respondents who have donated to health and medical research: 738*



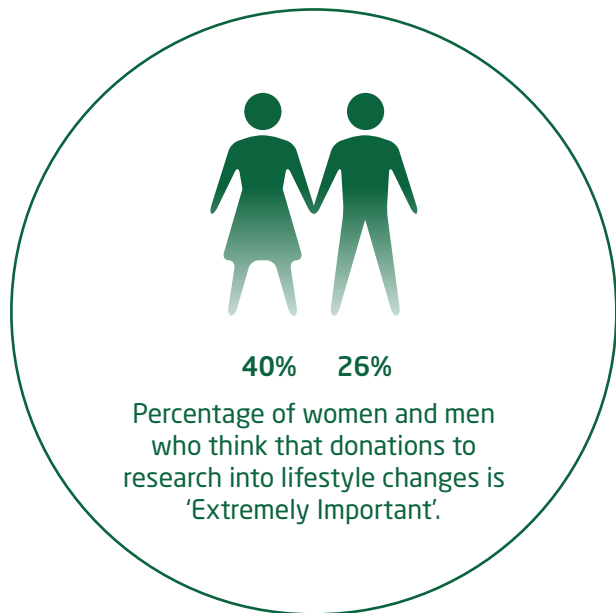
● Extremely important
 ● Very important
 ● Moderately important
 ● Not very important
 ● Not at all important
 'Can't say' responses not included in the table.

Differences among donors

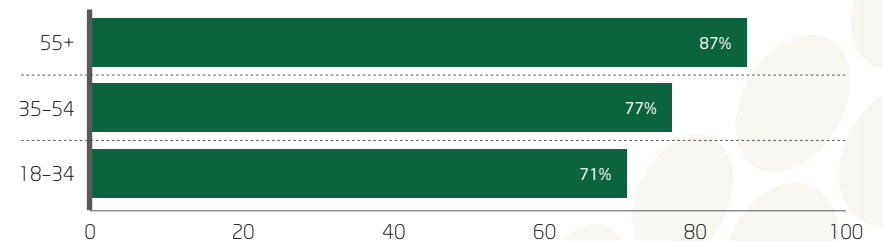
Research to make our health system safer, more effective and efficient was most popular with donors over the age of 55, perhaps reflecting their experience of the health system as requiring improvement.

Donations to support research into lifestyle changes was more popular with women than men; 40% of women considered this an 'Extremely Important' or 'Very Important' area for donations, compared to 26% of men. Again this result is consistent with responses to a question asked by Research Australia about the importance of different types of research, which found that more women than men believed that research which increased understanding of positive lifestyle changes was important.

Q: refer to page 22.



Research to make our health system safer, more effective and efficient



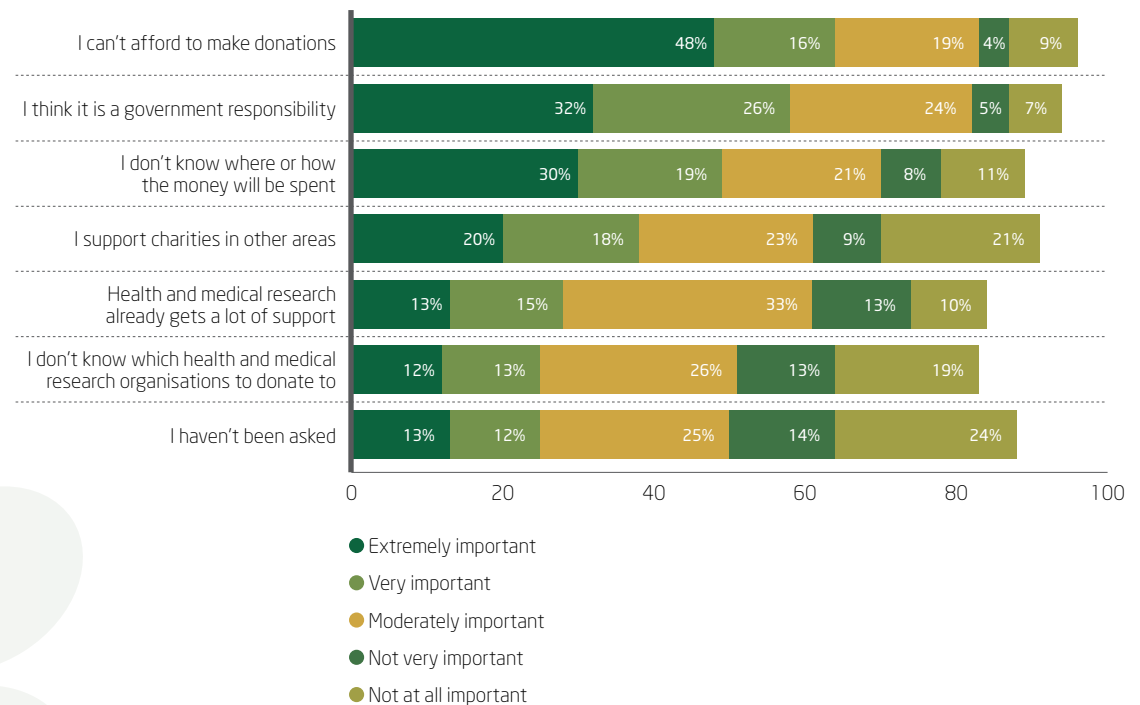
Why we don't donate to health and medical research

Individuals who had not donated to health and medical research were asked to rank the importance of six different reasons for why they don't donate.

The strongest response was an inability to afford to donate, followed by a view that it is a government responsibility, and concern about where or how the donation would be spent. The results are broadly consistent with the responses to the same question in Research Australia's 2012 opinion polling.

Q: How important are each of the following as reasons why you have not donated to health and medical research?
Base: People who never donate to health and medical research n=262

Reasons for not donating to H&MR



Nearly half of us think we probably should donate more to health and medical research

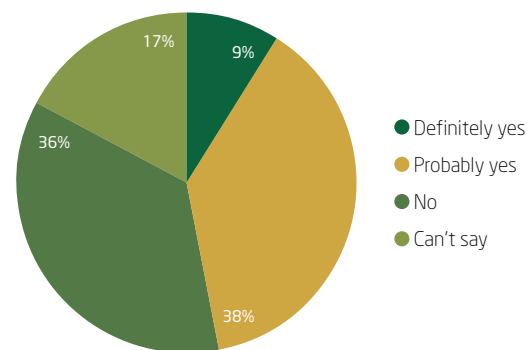
47% of Australians think they should be donating more to health and medical research than they currently are.

This view is strongest among people who already donate to health and medical research at least annually, with 60% of this group thinking they should definitely or probably donate more than they do now. This sentiment was also strong among 18-34 year olds, with 56% indicating they believe they should definitely or probably donate more.

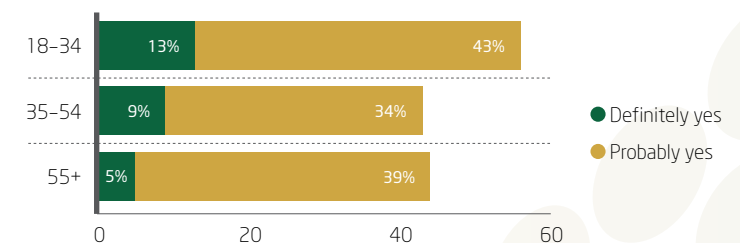
Q: Do you think you should give more money than you currently do to funding health and medical research?

*Base: All respondents
n=1,000*

Should you donate more to H&MR?



Should donate more by age group



When Research Australia asked the same question last year, 52% of respondents thought they should do so, but only 6% indicated 'definitely yes'.

Research Australia's 10 Strategic Imperatives 2012-2020

- 01 Successful collaboration = successful research
- 02 Bridge the Commonwealth - State divide
- 03 Fund the full cost of research
- 04 Encourage commercial investment in R&D
- 05 Foster philanthropy
- 06 World class research requires world class researchers
- 07 Reduce red tape
- 08 Develop implementation science - evidence into action
- 09 Research active health services deliver higher care
- 10 An empowered and informed community

A copy of the full document is available at <http://www.researchaustralia.org/about-us/our-policy-platform>

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