

An abstract graphic featuring stylized human figures in shades of blue, grey, and orange. The figures are positioned along a series of thick, wavy orange lines that sweep across the frame. Some figures are larger and more prominent, while others are smaller. The background is white, and the overall composition suggests a sense of movement and interconnectedness.

AUSTRALIA SPEAKS!

RESEARCH AUSTRALIA OPINION POLLING 2016

**RESEARCH
AUSTRALIA**
AN ALLIANCE FOR DISCOVERIES IN HEALTH

A MESSAGE FROM RESEARCH AUSTRALIA

The report once again reflects the high value individuals place on the importance of national investment funding for health and medical research. We think the reason for this is clear.

Australians understand the link between health and medical research and better healthcare. They believe the single most important thing we can do to improve our health system is to base healthcare on the best and most recent research.

In the year in which the Medical Research Future Fund is to provide its first funding for medical research and innovation, it has Australians' overwhelming support. The focus of the MRFF on research to improve healthcare fits well with the public's expectations of health and medical research and its relationship with our health system.

A fascinating area of development in contemporary society is the use of technology. Information is abundant and as individuals we are feeling empowered. Health technology has traditionally been associated with care in hospitals with things like: X-rays, MRIs, heart rate monitors and key hole surgery with miniature cameras. Health technology has also advanced into our homes, with 'CPAP' machines to assist snorers, home dialysis and digital glucose monitors. More recently we have seen the rise of smart phones with health apps, and the evolution of the humble pedometer into today's activity tracking devices.

These are part of a new trend towards individuals using technology to manage their own health and fitness, and our polling explores the scope for this technology to contribute to health and medical research. We also identify an opportunity for medical practitioners, doctors and patients to make greater use of the internet for referrals to trusted information.

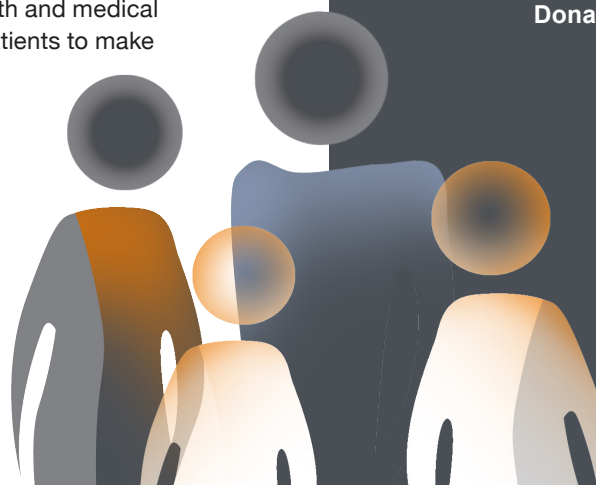
We hope you find this report thought provoking and informative.

Acknowledgements

The polling for this report was generously conducted by Roy Morgan Research, a Research Australia Platinum Member.

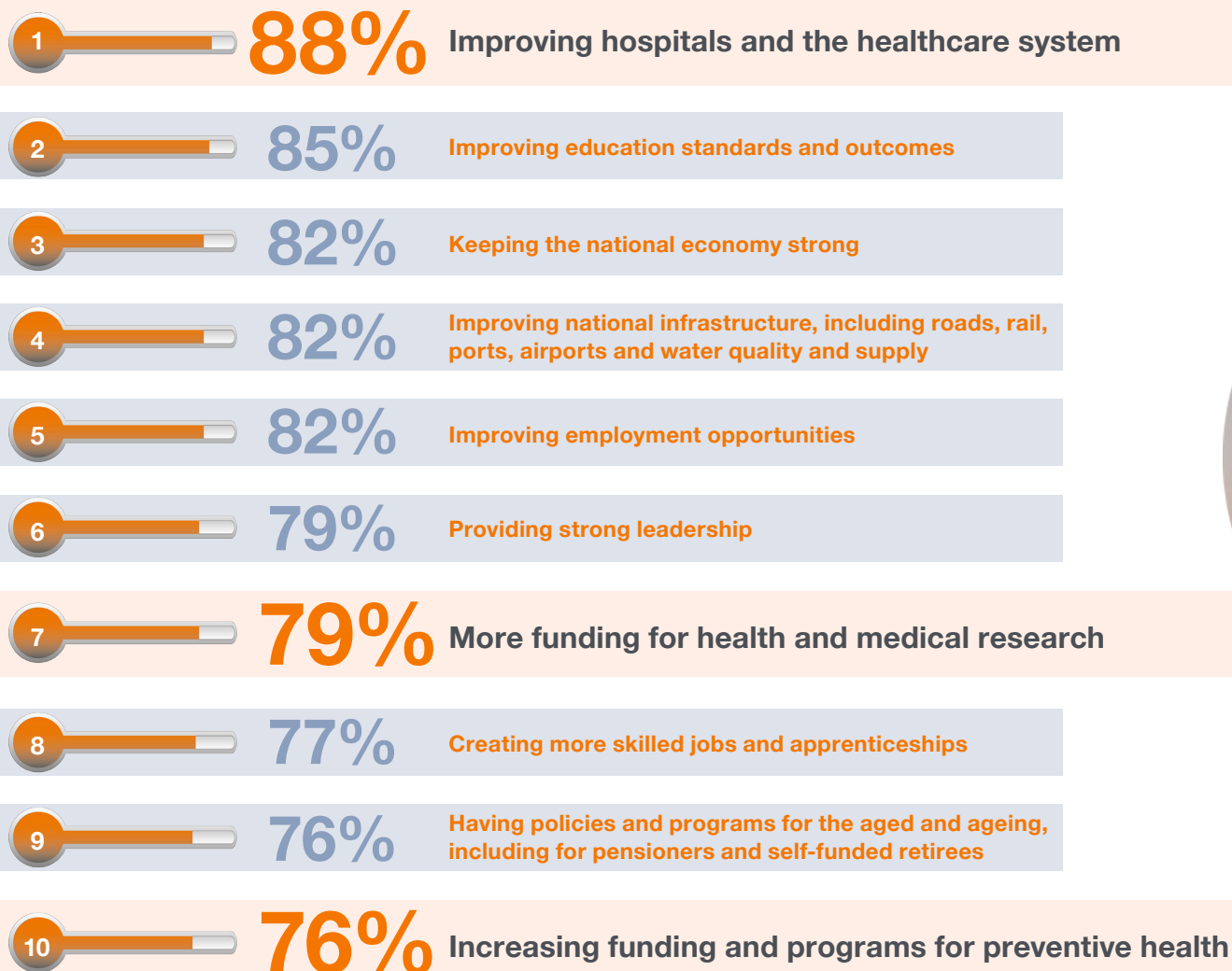
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PRIORITIES FOR THE AUSTRALIAN GOVERNMENT

Australians' top 10 priorities for the Australian Government



#1

Improving hospitals and health care remains the top priority, as it has since Research Australia commenced polling in 2003

3

of the top 10 priorities relate to health:

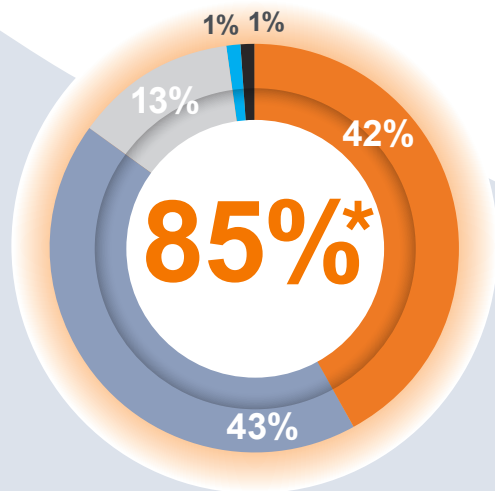
- Improving hospitals and the healthcare system
- More funding for health and medical research
- Increasing funding and programs for preventive health

27 priorities for Australian Government spending in the next two to three years were shown to respondents. The above scores reflect the proportion of respondents who rated each priority 7 or above out of a ranking of zero ('not important') to 10 ('extremely important').

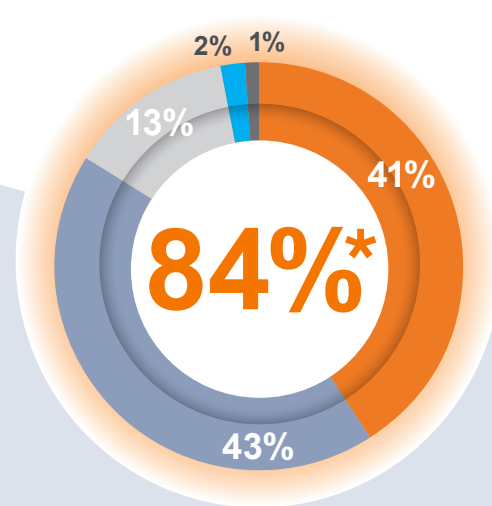
HEALTH AND MEDICAL RESEARCH OF ALL KINDS IS VALUED

There are many different types of health and medical research, including seeking to understand what happens inside us at the molecular level, to developing a greater appreciation of what affects the health of whole communities or improves the delivery of healthcare. When Australians tell us health and medical research is important and should receive more funding, what types of research do they have in mind?

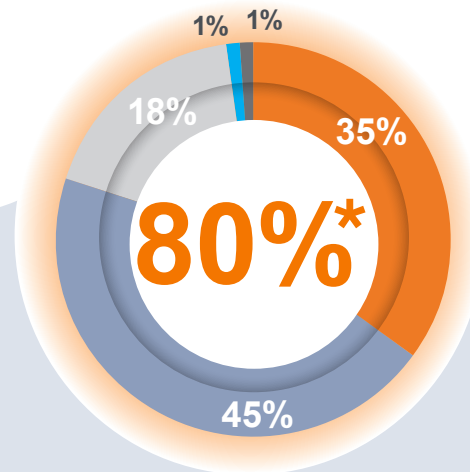
While Australians have a preference for some types of research over others, all are clearly considered important.



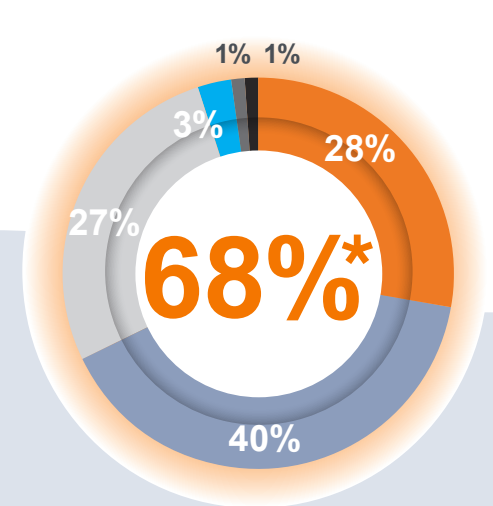
**MAKING NEW DISCOVERIES
ABOUT HUMAN HEALTH AND
DISEASE**



**TURNING DISCOVERIES
INTO NEW DRUGS AND
TREATMENTS**

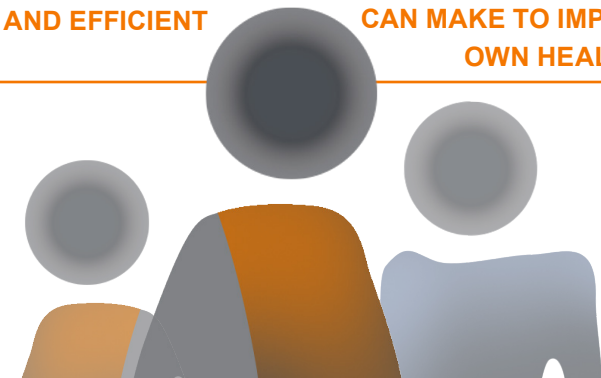
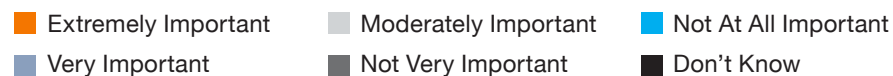


**RESEARCH TO MAKE OUR
HEALTH SYSTEM SAFER, MORE
EFFECTIVE AND EFFICIENT**



**INCREASING UNDERSTANDING
OF LIFESTYLE CHANGES WE
CAN MAKE TO IMPROVE OUR
OWN HEALTH**

*Total of the 'Extremely Important' and 'Very Important' ratings



MEDICAL RESEARCH FUTURE FUND POPULAR

The Medical Research Future Fund (MRFF) passed into law in August 2015 and will provide its first funding for health and medical research in 2016/17. The MRFF is forecast to provide an additional \$1 billion p.a. for health and medical research and innovation by 2022.



87%
of Australians
support the MRFF

Support is strongest among those
aged over 65, with **93%** in
favour of the MRFF.

45% Strongly Support

42% Somewhat Support

7% I Don't Know / Unsure

4% Somewhat Oppose

2% Strongly Oppose

39%

Job creation

34%

Economic
growth

76%

Development of new
drugs & medical devices

75%

Improving our
health system

78%

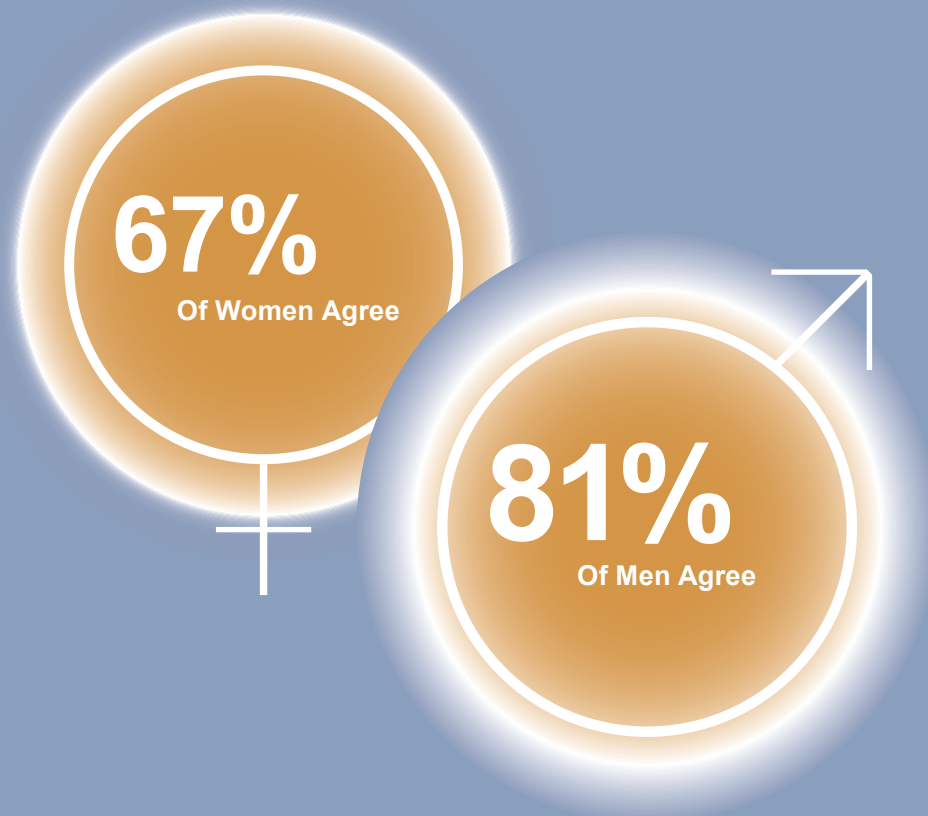
Better health
for Australians

Perceived Benefits of MRFF*

*Total of the 'Very Important' and 'Somewhat Important' ratings

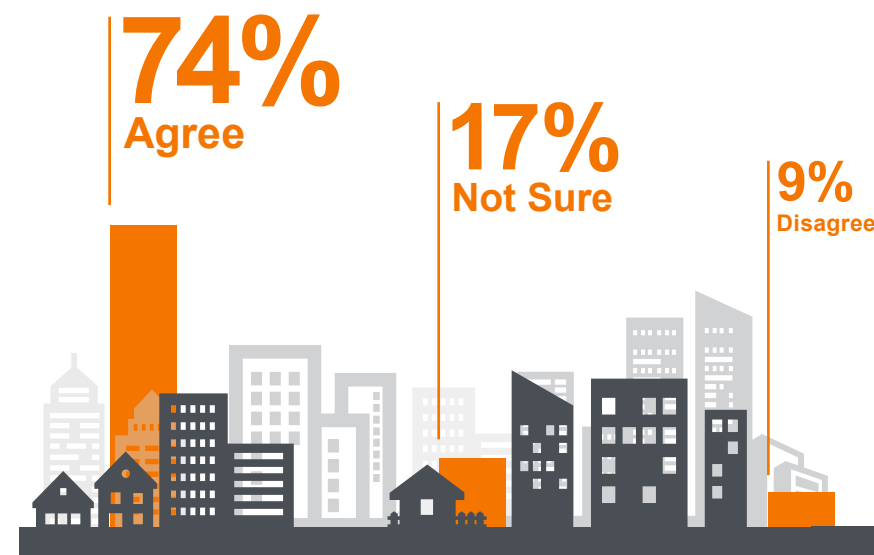
SCIENCE, HEALTHCARE AND THE INDIVIDUAL

A series of questions we asked about science, technology and health tell a compelling story over the next three pages about Australians' appreciation of the link between health and medical research and the healthcare they receive. Australians understand that science has played a critical role and has contributed to improving healthcare over the course of their lifetime. They want their healthcare to be based on the latest and best research but are sceptical that this is the case.



SCIENCE AND OUR STANDARD OF LIVING

Nearly 3/4 of all people surveyed believe that scientific innovations are improving our standard of living.



The infographic displays seven issues that concern Americans, ranked by the percentage of respondents who selected each issue. The issues are listed vertically, with their corresponding percentages and names. Each item is accompanied by a colored circle and a horizontal line with a dot indicating the percentage.

Issue	Percentage
Health Care	88%
Energy	64%
Communication & the Internet	59%
Protecting the Environment	52%
Education	41%
Transportation & Travel	35%
The Economy	27%

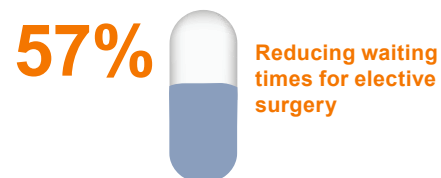
On the right side of the infographic, there is a large orange circle containing the following text:

We also asked whether the proposition has been researched. With so much of the opinion important surprise

We also asked people whether they agreed with the proposition that their health has been improved thanks to research over their lifetime. With so many Australians of the opinion that science is important to healthcare, it is no surprise that **89%** agreed.

SCIENCE IS THE KEY TO A BETTER HEALTH SYSTEM

Not only do Australians believe that science improves healthcare but they believe that the single most important thing we can do to improve the health system is ensure healthcare is based on the best and most recent research.



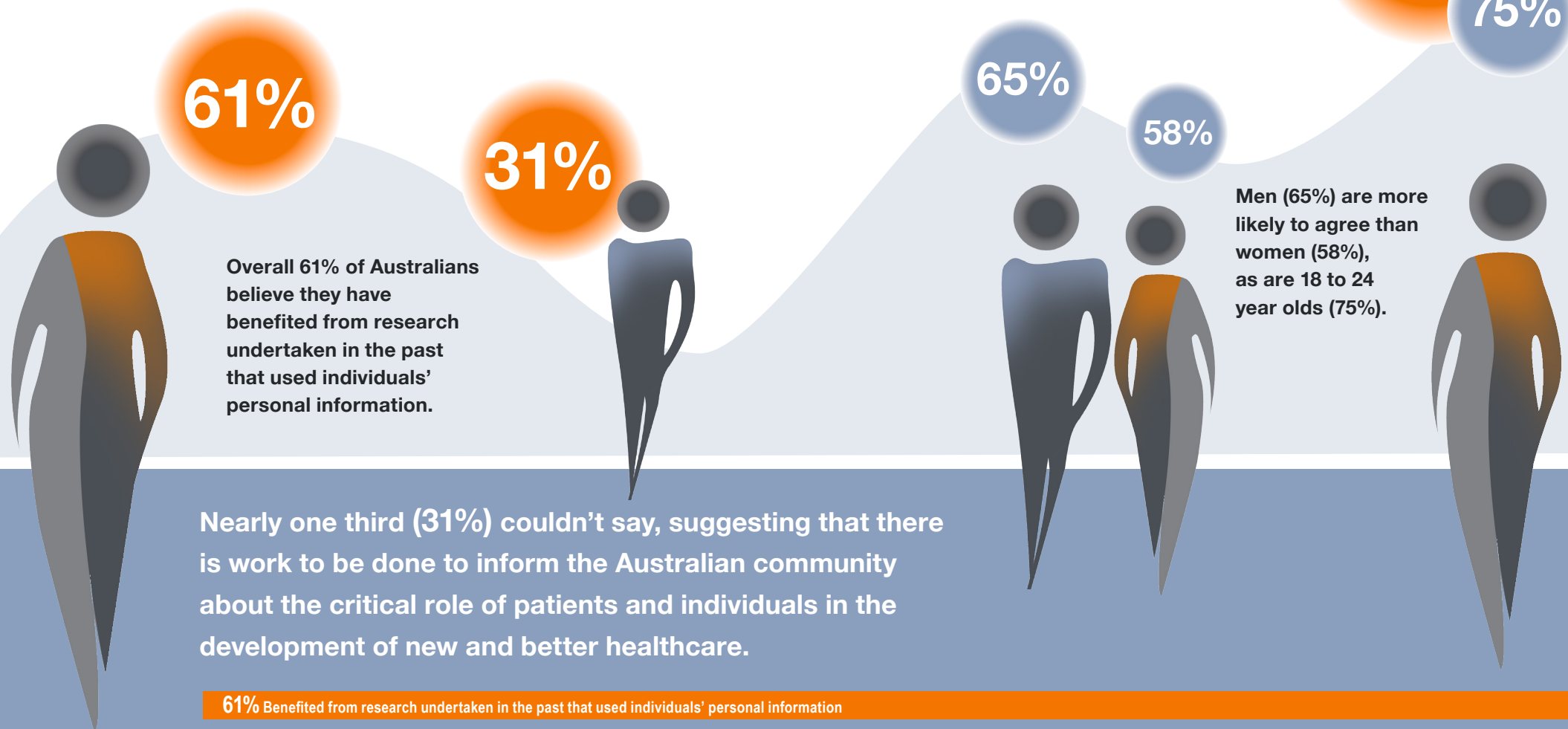
47%

While Australians want their healthcare to be based on the best and most recent research, fewer than half of Australians (47%) believe this is the case.

Men are more likely to believe this is the case than women. Younger people are generally more sceptical about this than older people. This scepticism is well placed - it can take many years for new evidence to make its way into practice.

RESEARCH AND YOUR INFORMATION

Improvements in healthcare through research rely on the participation of patients and the public. The identification of new diseases, the development of new treatments and identifying changes in the rise and decline of diseases over time all rely on information collected from individuals as patients and as members of the public.



61% Benefited from research undertaken in the past that used individuals' personal information

31% Not sure/Can't say

8% Haven't benefited from such research

AUSTRALIANS WILLING TO CONTRIBUTE THEIR DATA FOR RESEARCH

While nearly one third of Australians aren't sure if they have benefited from past research that used individuals' health information, the vast majority are willing for their information to be used for research purposes.



91%

are willing for their data to be used for research purposes



6%

are unsure



3%

are unwilling

The reasons for which people are willing to share their health information for research vary:

79%

To advance medical research

74%

So health care providers can improve patient care

68%

So public health officials can better track disease, disability and the causes



FUNDING DECISIONS SHOULD BE MADE BY THE EXPERTS

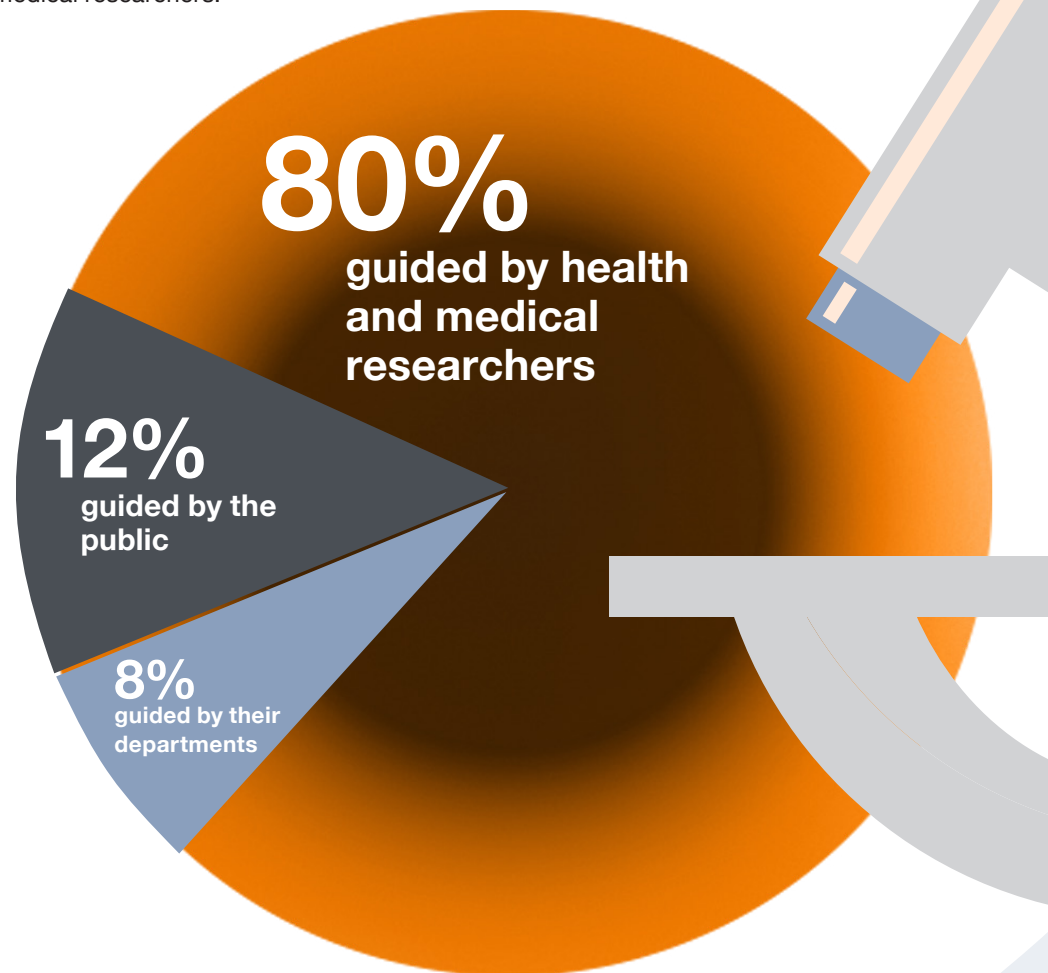
When it comes to governments making decisions about what health and medical research to fund, who should they listen to? 80% of Australians believe government ministers' decisions on funding should be guided by health and medical researchers.

Peer Review Process

Australians' expectations in this area largely reflect what happens in practice. Every year, health and medical researchers put forward proposals for funding, to funding agencies like the National Health and Medical Research Council.

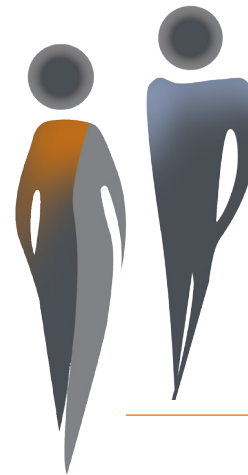
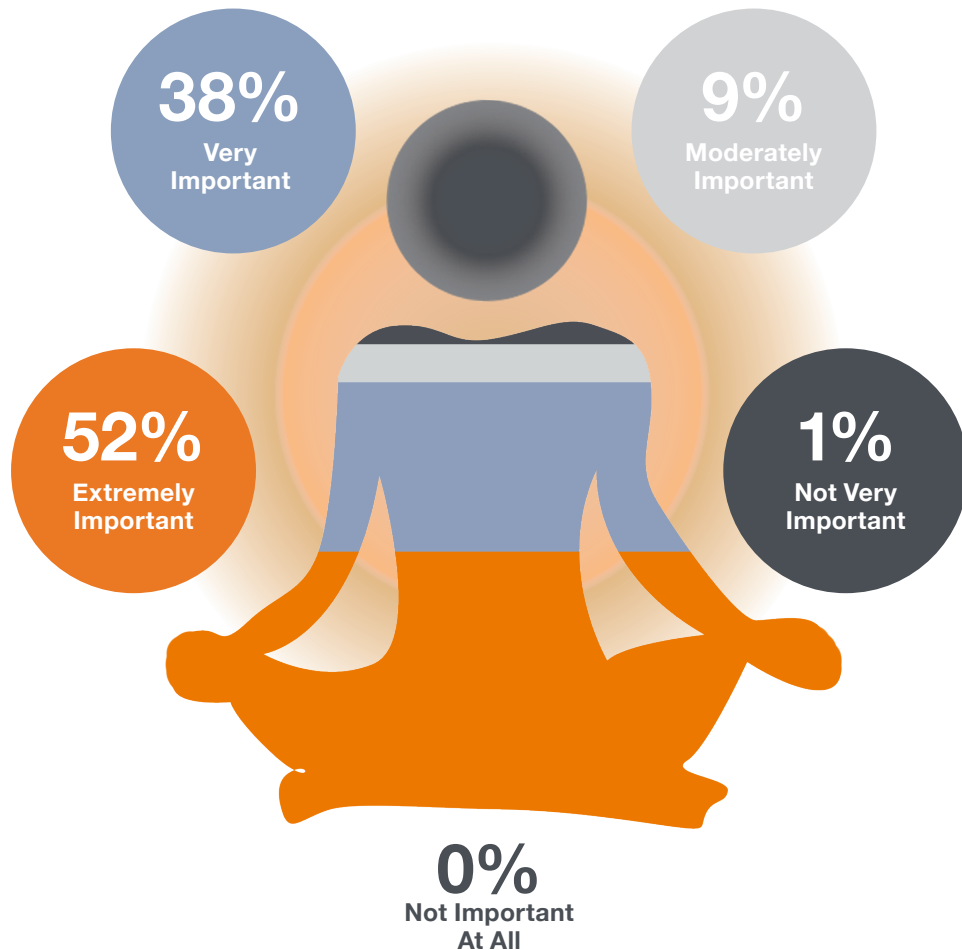
Each proposal is subjected to a rigorous process of assessment by a panel of other health and medical researchers ('peer review') to determine the proposals which are most deserving of funding.

Hundreds of health and medical researchers volunteer their time each year to review and assess these applications for funding.



MANAGING WELLNESS

Our health is important to us.
Looking after and/or improving our health is
Extremely or Very Important to **90%** of Australians.



59% Women

46% Men

More women than men consider it
to be Extremely Important

Looking after and
improving our health
generally becomes more
important with age -
68% of Australians aged
65 and over rated it as
Extremely Important
compared to 52% of
Australians overall.

83% of Australians are trying to
lose weight and/or improve
their fitness, with 45%
seeking to do both.



45% Lose Weight & Improve Fitness / Health

32% Improve Fitness / Health Only

6% Lose Weight Only

CAN TECHNOLOGY HELP US MANAGE OUR WELLBEING?

In the last few years the humble pedometer has evolved into a whole new technology of activity tracking devices, such as fitbit™ worn on the wrist or elsewhere on the body, or as apps on your phone. Capable of recording a range of movement and activity as well as your heart rate, your sleep patterns and how far, how fast and where you travelled, these devices allow data to be uploaded to a computer for review, and to monitor changes in performance over time.

Research Australia was curious about how many Australians are using these devices, what they are using them for, and what motivates them to do so. **Can technology help us manage our wellbeing?**



Just over one third of Australians reported having a device for tracking their fitness and/or activity.



Ownership is higher among younger people, 44% of 18-24 year olds.



Men and women own them in equal numbers.



Ownership is lowest amongst older people, 18% of those aged 65 and over.

More important than ownership is how often the devices are used.

Just over half (53%) of people who own a device reported using it daily or most days.

To put it another way, nearly one in five of all adult Australians (19%) use a device daily or most days.

While more young people own devices, usage rates don't vary markedly between younger and older owners of devices. Individuals who are trying to lose weight and/or improve their fitness do not use devices more than the general population.

Daily or most Days



At least once a week



At least once per month



Less often than once per month



Have not used in the last 12 months



Individuals who use a device daily or nearly daily

Research Australia was curious about people who use these devices regularly (daily or nearly daily). For regular users, the most commonly reported purpose was to track activity; second was using it to improve fitness by prompting greater activity.



Track My Activity



Help improve my fitness by prompting me to be active



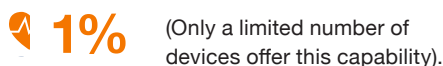
Monitor my fitness



Other



Monitor diet / calorie intake / nutrition



Men were more likely than women to use the device to track their activity (90% to 85%) and monitor their fitness (50% to 32%).

Regular users employ them to record a range of different activities. The most common use is tracking everyday moving and walking about. Others are walking specifically for exercise, running, at the gym and cycling.

Walking for exercise is most popular with people over the age of 65, with 80% of this age group using it for this purpose, while running is mostly undertaken by those under 50.



- 86% Everyday walking and moving about at home, work etc.
- 66% Walking for exercise
- 59% Monitor daily steps
- 24% Running
- 24% At the gym
- 13% Cycling
- 4% Rowing/paddling
- 3% Swimming
- 3% Other Sport
- 2% Sleep Tracking
- 9% Other

SHARING DATA ON OUR ACTIVITY FOR RESEARCH

It is typically necessary to download data from a device to a computer to see the information (except for basic info). Once downloaded, it is possible to generate reports of your performance. It is also possible to share and compare data with other people through a social media network. For example, a group who cycle together regularly may choose to share data such as distance travelled, time taken and heart rate.

The data collected by activity tracking devices is a potentially useful source of data for health and medical research if it can provide a picture of the levels of activity and exercise of a broad range of Australians on an everyday basis. **Are Australians willing to provide the data from their devices to researchers, with the proviso that they can't be individually identified?**

The answer for three quarters of people who use these devices regularly is 'yes'. This group amounts to a little over 14% of the entire adult population - ie. about one in seven adult Australians use a fitness tracking device regularly and are prepared to share their data with researchers.

With 78% already regularly uploading this data to their computer, collecting data for research purposes seems feasible and there are enough people using the devices to make it worthwhile.

75%
Willing to share
data with
researchers

14%
Not Willing
to Share

11%
Not Sure / Can't Say

41%

of people who download their data share or compare data with other people. Men are more likely to do so than women, and the propensity to do so declines with age.

78%

of those who use a device daily or almost daily download and review the data, with virtually no difference between men and women.



USING THE INTERNET FOR OUR HEALTH

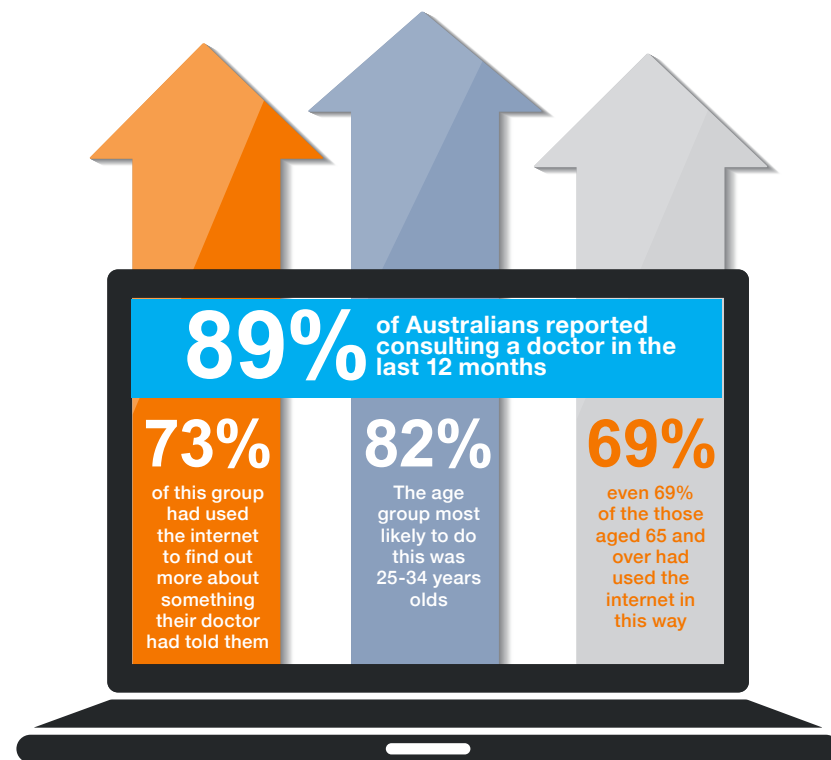
89% of Australians reported consulting a doctor in the last 12 months. Just over one fifth (21%) who had seen a doctor in that period reported that their doctor had suggested a website where they could find more information.



Only 1 in 10 had asked a doctor to suggest a website.

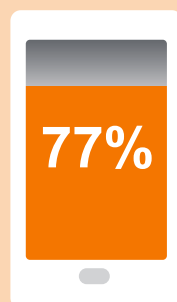


Despite these relatively low numbers, more than three quarters (77%) reported that they would find it helpful if a doctor suggested a website they could visit. While doctors may be concerned that patients would react badly to such a suggestion, only 16% believed that their doctor should be able to give them all the information they need.



Large numbers of Australians are turning to the internet when they have a health problem but finding useful and trustworthy information can be difficult. Doctors are a trusted source of information but only refer patients to websites in a small minority of cases. The findings suggest that most patients would welcome referrals to websites. Doing so more often could empower patients and improve rather than hinder the patient relationship. For their own part, patients should be more willing to ask their doctor to recommend websites where they can find more information. (Note: these results may be influenced by the fact that the polling is conducted using the internet.)

If my doctor suggested a website where I could get more information....



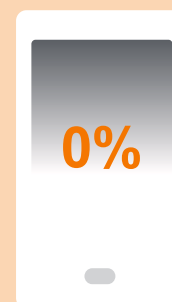
I would think this was helpful



I would not think this was helpful - he or she should give me all the information I need



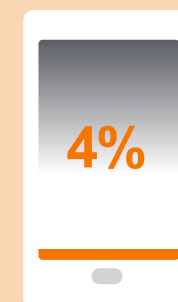
I would not think this was helpful - I would not want/need to get more information



I would not think this was helpful - I do not use the internet



I would not think this was helpful - for some other reason



Don't know / can't say

SHOULD WE TAX SUGARY SOFT DRINKS?

Tracking our physical activity is not the only action we can take to manage our own health. We know that obesity is a growing problem in developed and developing countries and a range of measures are being taken around the world to address this issue. One measure that was adopted in Mexico in 2014, and was announced earlier this year in the UK Budget is a tax on soft drinks with high levels of sugar. With looking after and/or improving their health either Extremely or Very Important to 90% of adult Australians and 51% trying to lose weight (p.12), Research Australia wondered how many Australians would be willing to support a tax on sugary soft drinks in Australia.

48%

of Australians
definitely support a tax
on soft drinks, sport
and energy drinks

27%

indicated they would
probably support
such a tax

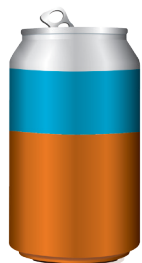
52%

Support is strongest
amongst women

65%

of people who are 65
and older definitely
support the tax

Would you support a tax on soft drinks, sport and energy drinks with high levels of sugar if the revenues raised were used to fund programs to reduce the damaging health effects associated with consuming high levels of sugar?



SUPPORT

Probably
Support 27%

Strongly
Support 48%



OPPOSE

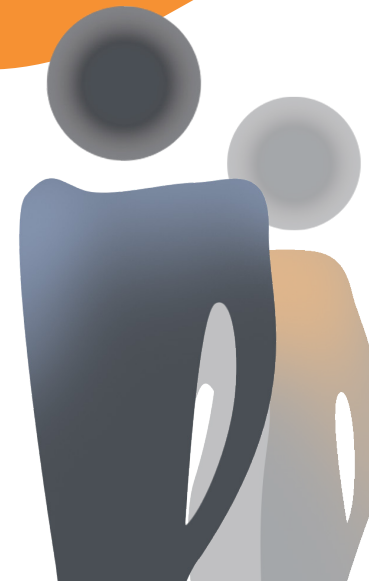
Probably
Oppose 12%

Strongly
Oppose 11%



DON'T KNOW 2%

**More men
are definitely
opposed to
such a tax
(14%) than
women (8%)**



DONATIONS TO HEALTH AND MEDICAL RESEARCH

Donations are an important source of funding for Australian health and medical research. This year, 44% of Australians reported that they donate at least annually to health and medical research, down slightly from 48% in 2015. Individuals earning more than \$50,000 per year (50%), those with a person with a disability in their household (52%) and those who provide care for a person at home with a disability (56%) are most likely to donate at least annually to health and medical research.

Half of the people who donate annually make more than one donation each year. Individuals aged 65 and over are most likely to donate 4 or more times per year (8%).

44%

of Australians donate at least annually to health and medical research, down slightly from 48% in 2015

56%

those who provide care for a person at home with a disability

52%

those with a person with a disability in their household

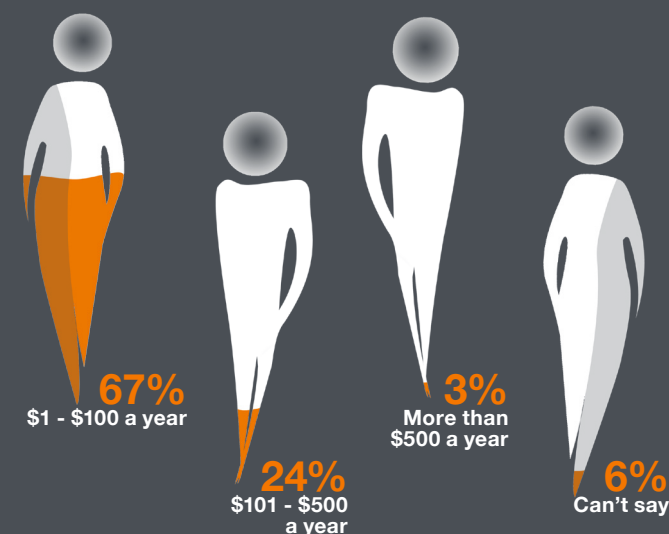
50%

Individuals earning more than \$50,000 per year

Donate to health and medical research



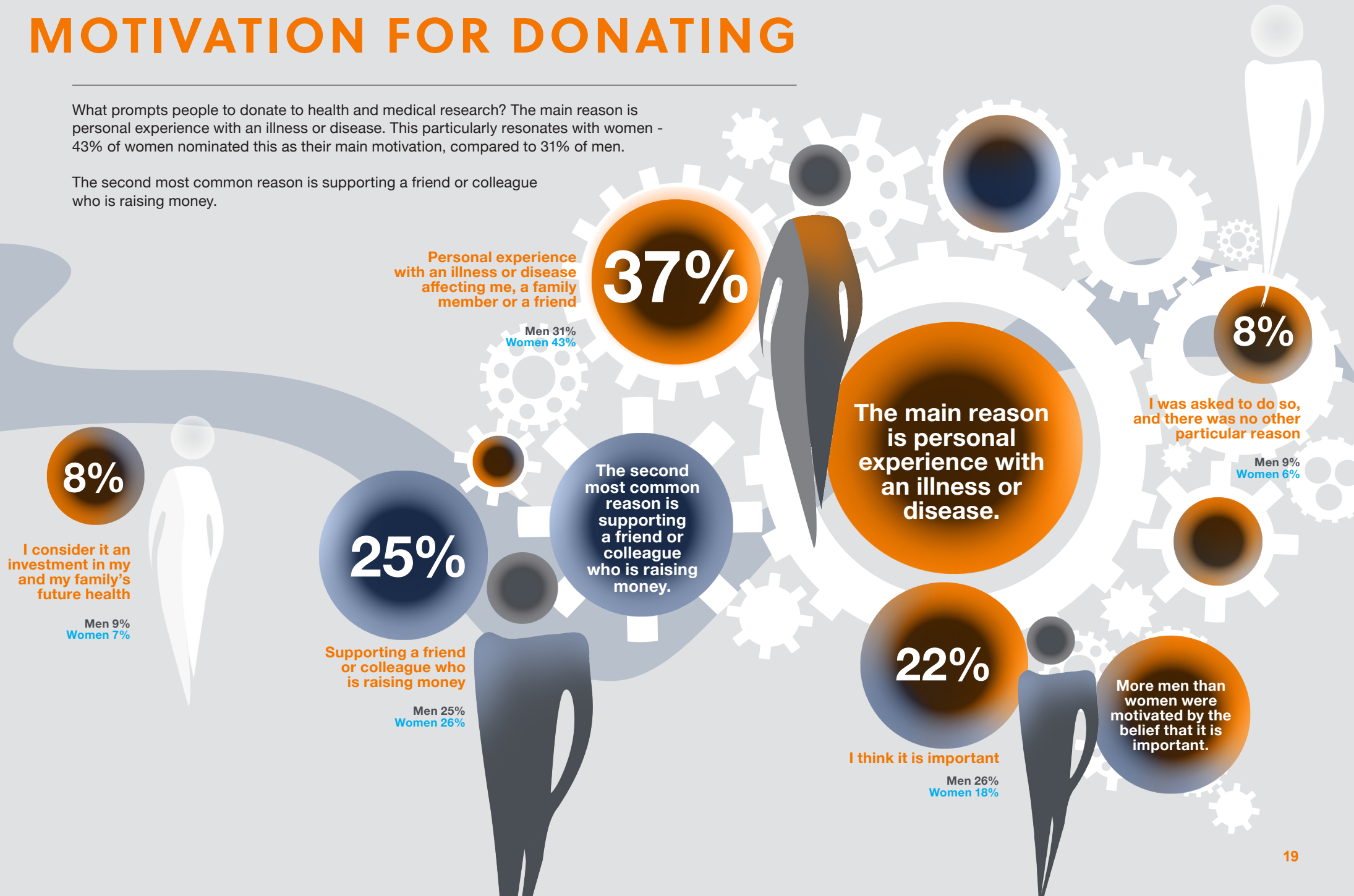
Two thirds of people who donate at least annually donate \$100 or less. One quarter donate between \$100 and \$500.



MOTIVATION FOR DONATING

What prompts people to donate to health and medical research? The main reason is personal experience with an illness or disease. This particularly resonates with women - 43% of women nominated this as their main motivation, compared to 31% of men.

The second most common reason is supporting a friend or colleague who is raising money.



OPINION POLLING QUESTIONS

Australians' top 10 priorities for the Federal Government (Page 03)

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.

Health and medical research of all kinds is valued (Page 04)

Q In relation to more funding for health and medical research, please rate the importance of more Federal Government funding for research in the following areas.

Medical Research Future Fund popular (Page 05)

Q: The Federal Government last year established a Medical Research Future Fund which will build to \$20 billion over time and use only the investment earnings to fund health and medical research. The aim is for the investment earnings of the Medical Research Future Fund to provide \$1 billion per year for health and medical research by 2021. Do you support this proposal?

Q Please rate how important you think the Medical Research Future Fund will be to the following: Better health for Australians, Development of new drugs & medical devices, Improving our health system, Job creation, & Economic growth.

Science, healthcare and the individual (Page 06)

Q Do you agree or disagree with the following statement... “Scientific innovations are improving our standard of living.”

Healthcare is where science is most important (Page 07)

Q In which of the following areas of your life, if any, do you think scientific research has played an important role? Mark all that apply.

Q Do you mainly agree or disagree that your health has been improved thanks to research over the course of your lifetime?

Science is the key to a better health system (Page 08)

Q In relation to improving hospitals and the healthcare system, please rate the importance of the following initiatives.

Q Do you believe the healthcare services you personally receive are based on the best and most recent research available?

Research and your information (Page 09)

Q Do you think the healthcare provided to you has benefited from research undertaken in the past that used individuals' personal health information?

Australians willing to contribute their data for research (Page 10)

Q For which of the following would you be willing to share your personal health information if you could not be individually identified? Mark all that apply.

1. To advance medical research
2. So health care providers can improve patient care
3. So public health officials can better track disease and disability and the causes
4. None
5. Not Sure

Funding decisions should be made by the experts (Page 11)

Q The Federal and State/Territory governments make significant investments in health and medical research. Please indicate how you think government ministers should be guided in making decisions about funding for health and medical research by ranking the following items from 1 to 3, where 1 indicates your preferred method for how funding decisions should be made, and 3 indicates your least-preferred method.

“Decisions about what health and medical research is funded should be made by government ministers guided by.....”

Managing wellness (Page 12)

Q How important to you is looking after and/or improving your health?

Q Are you currently trying to lose weight and/or improve your fitness/health?

OPINION POLLING QUESTIONS

Can technology help us manage our wellbeing? (Page 13 & 14)

Q How often do you use this device for tracking fitness/activity?

Q Why do you use this device?

Q For what activities do you use this device?

Sharing data on our activity for research (Page 15)

Q Do you download and review/track the data?

Q Do you share or compare the data with other people?

Using the internet for our health (Page 16)

Q Please complete the following statement by choosing the option that most closely matches your opinion. "If I saw a doctor and he/she suggested a website where I could find out more information about a medical condition that I had....."

Should we tax sugary soft drinks? (Page 17)

Q The Australian Government currently imposes high taxes on products such as tobacco and alcohol, partly to reduce consumption and the damaging health effects and costs. The Australian Bureau of Statistics has recently reported that just over half of all Australians consumed more than the daily recommended amount of sugar, and that the largest source was soft drinks, sport and energy drinks.

Would you support a tax on soft drinks, sport and energy drinks with high levels of sugar if the revenues raised were used to fund programs to reduce the damaging health effects associated with consuming high levels of sugar?

Donations to health and medical research (Page 18)

Q Thinking specifically about funding for health and medical research in Australia, about how often do you personally donate money to health and medical research?

Q And, on average, about how much money in total each year would you donate to health and medical research?

Motivation for donating (Page 19)

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, with 1 being the factor that has the biggest influence on your decision, and 5 the factor with the least influence.



METHODOLOGY

Research Overview	
Statement of Compliance with International Standards:	This research project was carried out in compliance with ISO 9001 & ISO 20252
Client Name:	Research Australia
Research Service Provider Name(s):	Roy Morgan Research Ltd
Sub-contractor used:	None
Process sub-contracted:	None
Research Objectives:	This research was conducted to trend attitudes towards medical and health issues in Australia.
Quantitative Research	
Target Group:	Australians 18 years and older
Proposed Sample Size:	1000
Actual Sample Size:	1040
Reason for Difference in Proposed to Actual Sample Size:	Slight over-recruitment in some age/gender/location cells due to some respondents having begun but not completed the online survey when the quota target was met (i.e. they are permitted to finish). This over-recruitment was subsequently corrected during the weighting process (see below)
Fieldwork Period:	30th May to 4th June 2016
Sampling Method:	Members of Roy Morgan Research's Proprietary Online Panel, 18 years and older, living in Australia, were emailed an invitation to participate in the survey.
Data Collection Method:	Online survey (CAWI – Computer Assisted Web Interviewing)
Response Rate:	12.8%
Weighting Process:	Weighted proportional to population by age, sex and area, and projected to Australian 18+ population estimates
Estimation/Imputation Procedure:	No estimation/imputation processes used
Representatively of the Sample Population:	Sample is broadly representative of Australia's population by sex, age and area
Maximum Sampling Tolerance:	±3.0%
Incentive Type:	Points redeemable for cash

MAJOR PARTNERS OF RESEARCH AUSTRALIA

FOUNDATION



PLATINUM



GOLD



SILVER



ABOUT RESEARCH AUSTRALIA

Research Australia is an alliance of 160 members and supporters advocating for health and medical research in Australia.

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Roy Morgan
— Research —

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