

AUSTRALIA SPEAKS! 2018

Opinion polling for health
and medical research

RESEARCH
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Australians are major stakeholders in health and medical research and Research Australia believes that what Australians think of health and medical research is important.

The opinions of Australians continue to shape our strategies and priorities and assist us to ensure that a healthy population and healthy economy go hand in hand.

Ensuring that we know the views of Australians on health and medical research (HMR) and its role in our society is the reason we have conducted annual opinion polling since 2003. While many things have changed over that time, the high priority Australians place on healthcare and HMR, has not. Improving hospitals and healthcare has been the number one spending priority for the Australian Government every year, and more funding for health and medical research has always been in the top 10.

The rise of precision medicine exemplifies both how quickly the health landscape is changing, and how health and medical research is at the forefront of healthcare. Our poll shows that Australians are ready to embrace precision medicine if it can help them, and are equally willing for

their experience to be used to assist others in the future.

While many Australians are confident of their ability to contribute to decision making about the direction of future health and medical research and are keen to learn more about how to do so, they don't know how to contribute, and most believe they would not be listened to. Our governments and research organisations have work to do if they genuinely want to engage the public in the future of health and medical research.

In the past year the Medical Research Future Fund has started to fulfil its potential with the first allocations of funding and public support remains strong. Support for the My Health Record is strong, bearing in mind this poll was conducted ahead of the opt out launch. Australia's health and medical research sector has welcomed Government moves to strengthen privacy protections of the My Health Record. People have real concerns which must be addressed as

this is too important an opportunity to forego because of a lack of information.

Finally, while the amount of new information and the pace of change in healthcare can seem overwhelming, Australians are willing to embrace technology that can help them better manage their own health. They trust healthcare professionals to assist them in making decisions about what technology will assist them, and for guidance on where to find more information they can rely on.

We need to make sure that all concerns or barriers to doing this are heard and addressed – after all it's personal!



Nadia Levin
Chief Executive Officer
Research Australia



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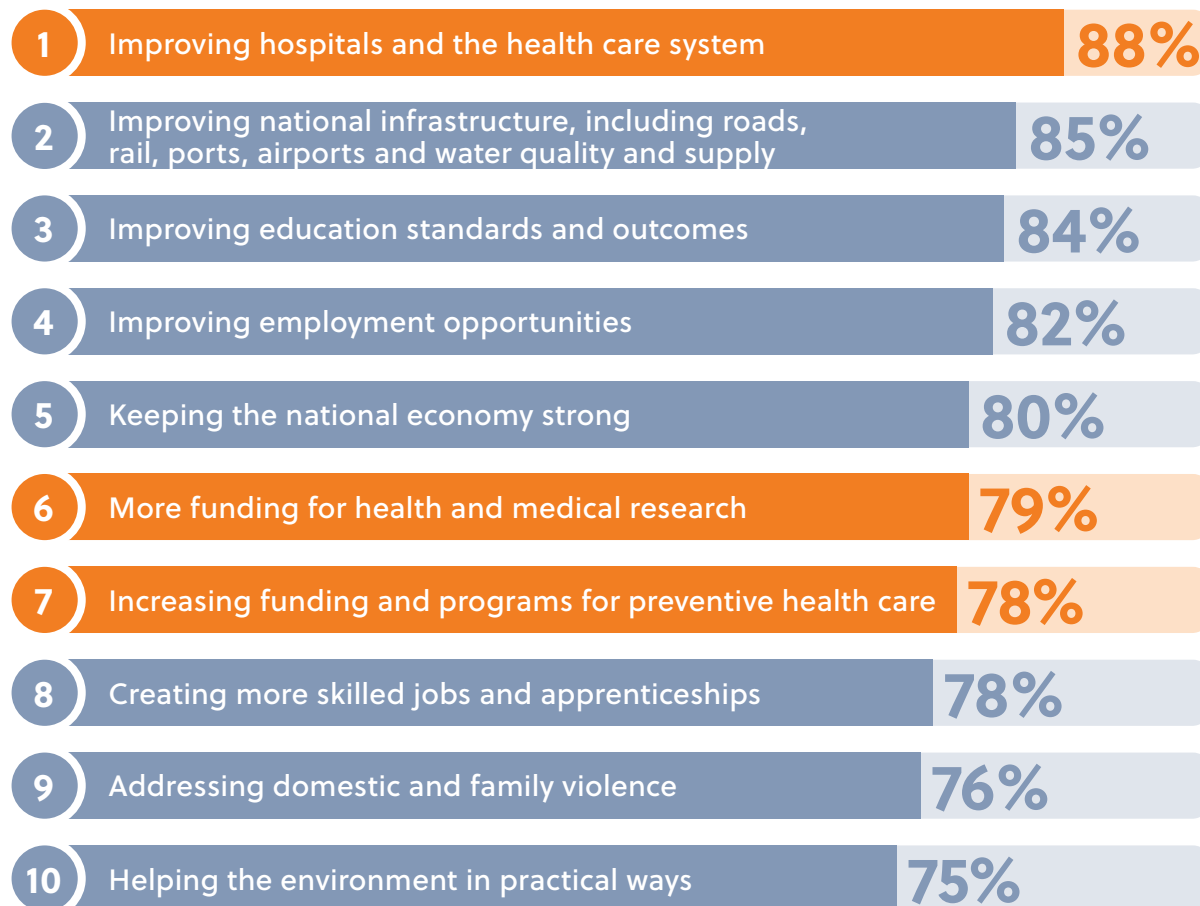
ACKNOWLEDGMENTS

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

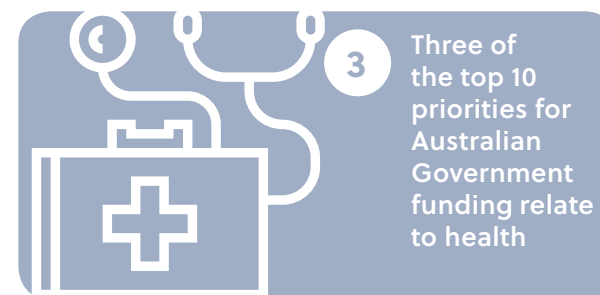


ROY
MORGAN

AUSTRALIANS' TOP 10 PRIORITIES FOR THE AUSTRALIAN GOVERNMENT



27 priorities for Australian Government spending in the next two to three years were shown to respondents. The 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').

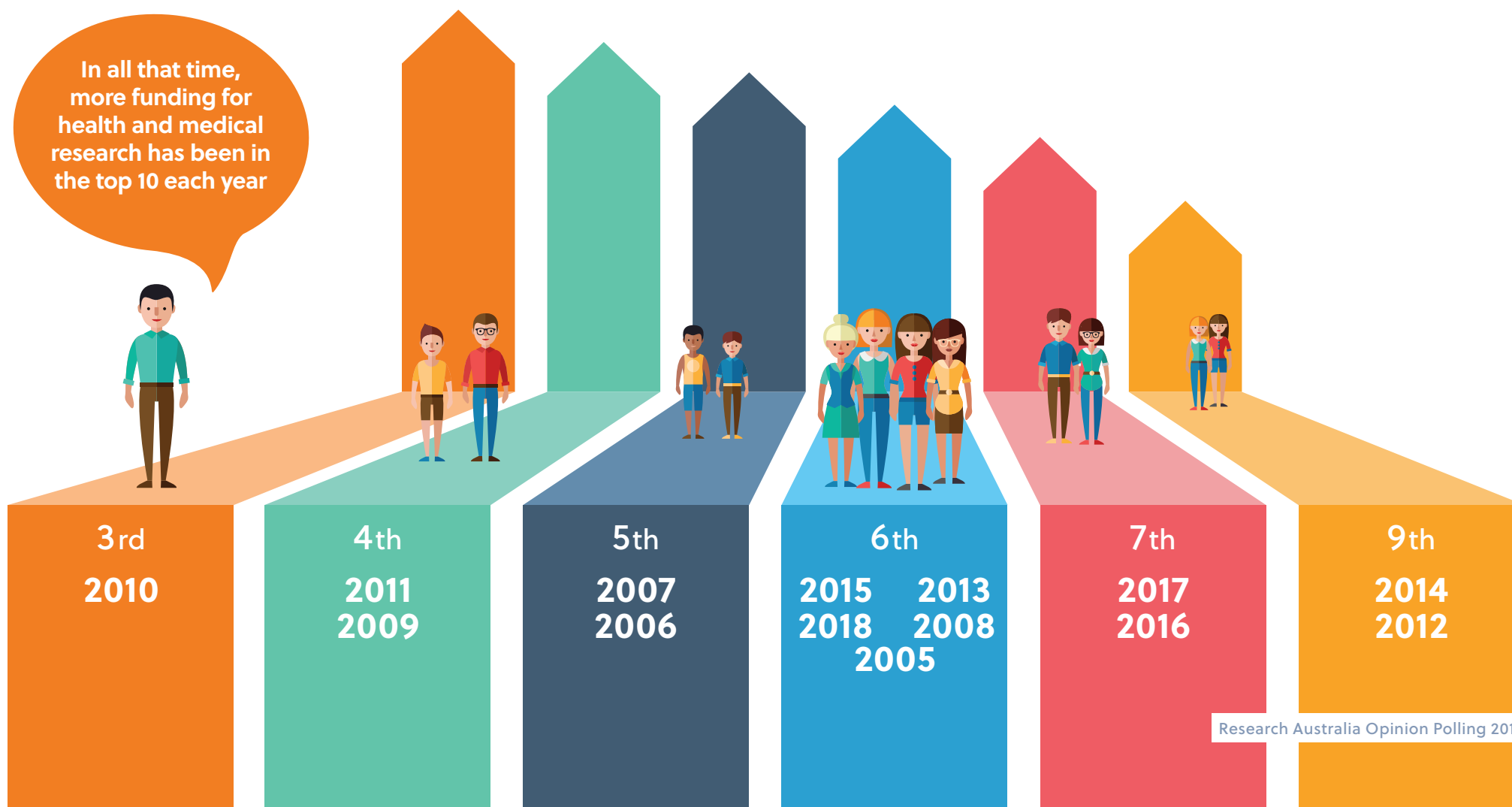


Research Australia has been polling for over 16 years, and the results consistently show that funding for hospitals and the healthcare system, remain the number one priority for Australian Government funding.

QUESTION:

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.

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AUSTRALIANS ARE INTERESTED IN SCIENCE, HEALTH AND MEDICAL RESEARCH

At Research Australia, we believe Australia's future health and prosperity lies in scientific research and innovation.

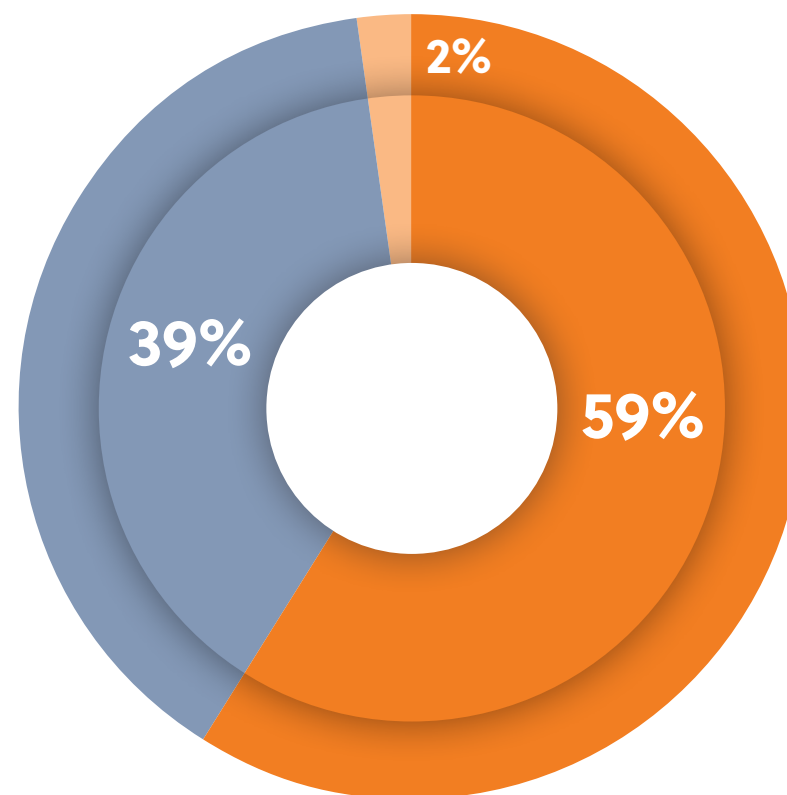
In particular, health and medical research can lead to new discoveries, new export industries, more jobs and safer and more efficient healthcare.

Health and medical research is dependent on a workforce with deep knowledge and expertise, especially in science technology, engineering and maths (the STEM subjects). It is clear that many Australians share our view of the importance of these subjects.

When we asked them to think about our future workforce and education system, 59% nominated STEM subjects as more important than others.

Not only do people recognise how important these subjects are, but nearly all of us are at least somewhat interested in science in general, and in health and medical research in particular.

QUESTION:
Thinking about our future workforce and the education system, how important do you think subjects such as science, technology, engineering and mathematics will be to Australia's future?



- Most important subjects
- No more important than others
- Less important than others

STEM subjects



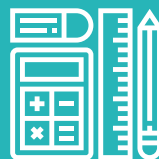
Science



Technology

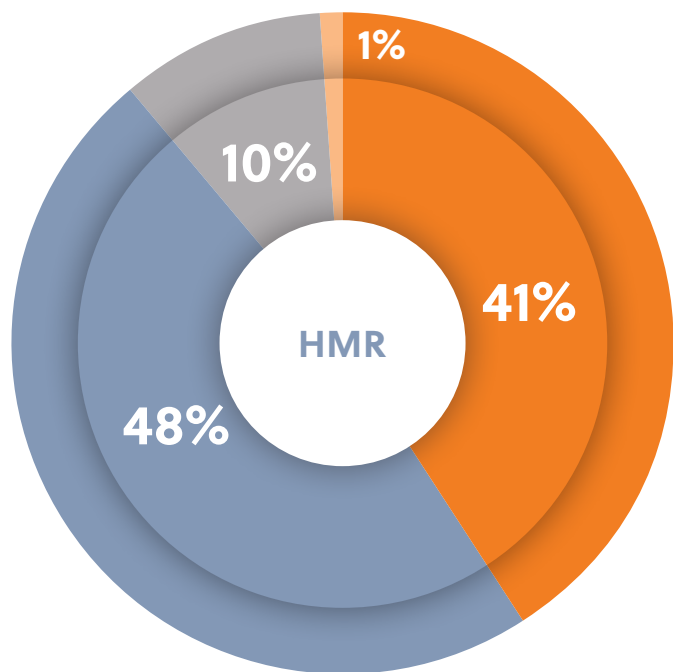


Engineering

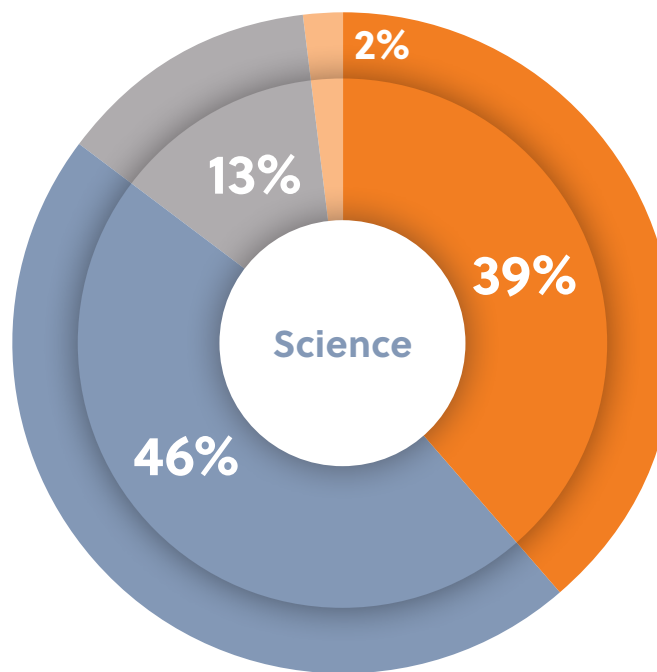


Maths

89% of Australians are interested in health and medical research.



41% of Australians are very interested in health and medical research



39% of Australians are very interested in science

Very interested Somewhat interested Not very interested Not at all interested

QUESTION:
Question: How interested are you in science generally?

QUESTION:
How interested are you in health and medical research?

Whilst a higher percentage of women (48%) than men (34%) are very interested in HMR the opposite is true of science with 48% of men and 30% of women very interested in science.

The strongest interest in health and medical research is among those age 65 and over, with 58% being very interested. For science, it is 25-34 year olds, with 44% reporting they are very interested.

DECISION MAKING ABOUT HEALTH AND MEDICAL RESEARCH

QUESTION:

Please indicate how you think government ministers should be guided in making decisions about funding for health and medical research.

The Australian Government is a significant source of funding for health and medical research.

The National Health and Medical Research Council is the Australian Government's principal funding agency for health and medical research. In existence since 1937, the amount of funding it provides for health and research has grown from 30,000 pounds in that first year to more than \$800 million per year.

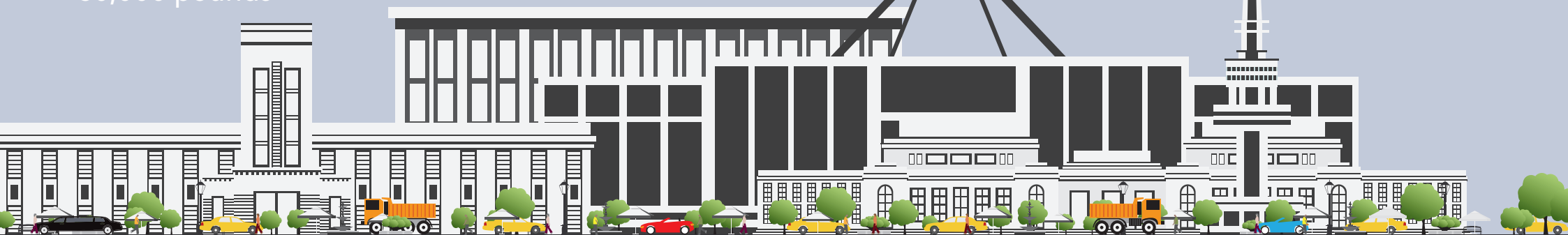
At Research Australia, we are interested in what people think about how decisions about funding for health and medical research should be made. Who should influence the decisions? Who should government ministers listen to?

2018

\$800 million

1937

30,000 pounds



National Health and Medical Research Council funding

78% nominated researchers as their number one choice for guiding ministers' decisions about health and medical research funding.

This is ahead of patients and consumer groups (14%), and government departments (8%).

50% of people nominated patients and consumer groups as their second choice for guiding decisions

60% of Australians are interested in learning more about how they can influence government decision making about what health and medical research to fund

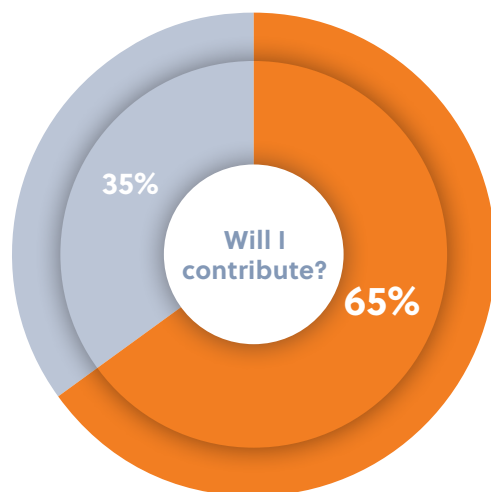
DECISION MAKING ABOUT HEALTH AND MEDICAL RESEARCH

Governments are increasingly interested in involving patients and consumer groups in decision making. But are people confident and able to participate? We asked people about participating in decision making.

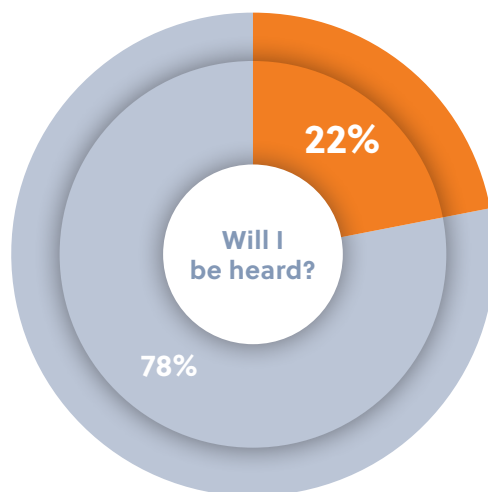
QUESTION:
Do you believe your opinions on where government should direct funding for HMR would be listened to?

QUESTION:
Would you be confident contributing your opinions to help direct government funding of HMR?

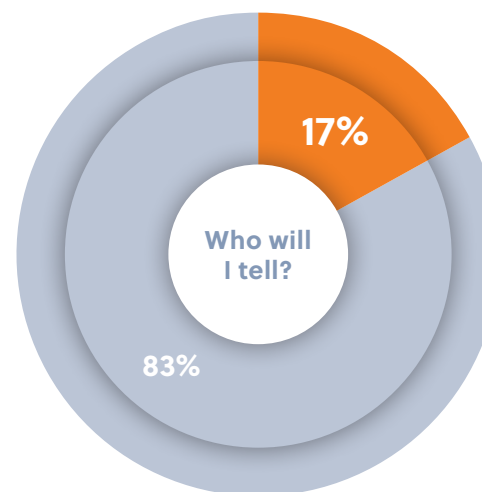
QUESTION:
Would you know who to contact to contribute your opinions about where government should direct funding for HMR?



Nearly two thirds (65%) of people told us they would be confident contributing their opinions to help direct government funding of research



Only 22% were confident they would be listened to



Only 17% would know who to contact

There is clearly more work to be done

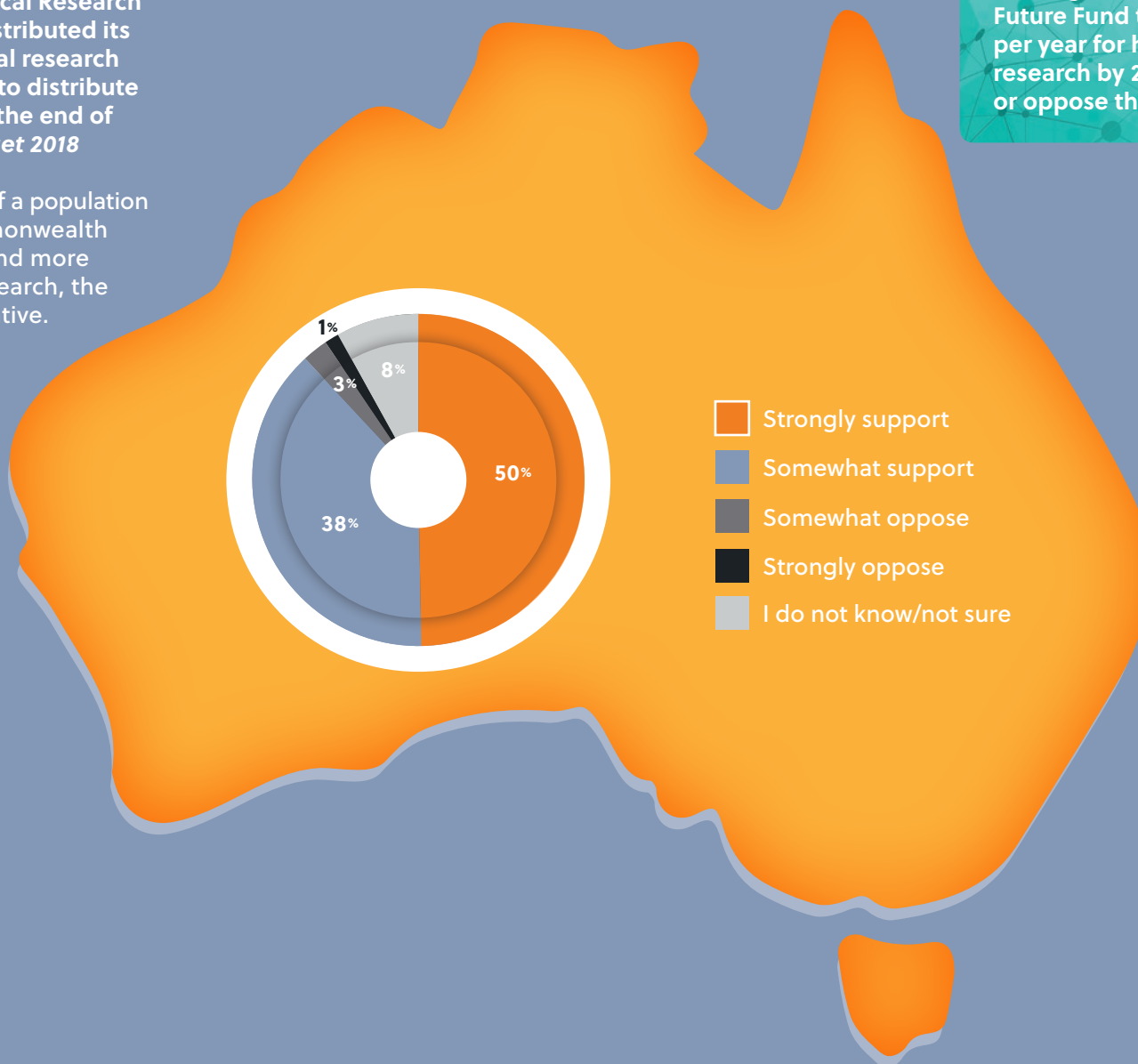
STRONG SUPPORT FOR THE MEDICAL RESEARCH FUTURE FUND (MRFF)

Established in 2015 by the Australian Government, the Medical Research Future Fund (MRFF) distributed its first funding for medical research in 2017, and is forecast to distribute nearly \$400 million by the end of July 2019. *Federal Budget 2018*

As might be expected of a population which thinks the Commonwealth Government should fund more health and medical research, the MRFF is a popular initiative.

Half of Australians strongly support it, and a further 38% professed to be somewhat supportive.

Support was equally strong in 2016 and 2017 when we asked a similar question.



QUESTION:

In 2015 the Federal Government established the 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 or oppose this proposal?

10

Who are the MRFF's strongest supporters?

67% of those aged 65 and over strongly support the MRFF.

Otherwise, support is strong across Australia with no significant differences between states or between capital cities, towns and rural areas.

QUESTION:

If you had a disease and there was the opportunity to use genetic testing to identify the most effective drug, would you do so?

Precision medicine uses genetic testing to identify the best treatment for an individual patient.

It relies on using evidence from previous patients to understand how people with different genetic traits respond to different drugs for particular diseases, such as cancer. It enables doctors to prescribe drugs for new patients that have worked before for other patients with similar genetic profiles.

The use of genetic testing in this way is expanding rapidly but is still relatively new. We wanted to understand how people feel about it.

Use genetic testing to treat your disease?

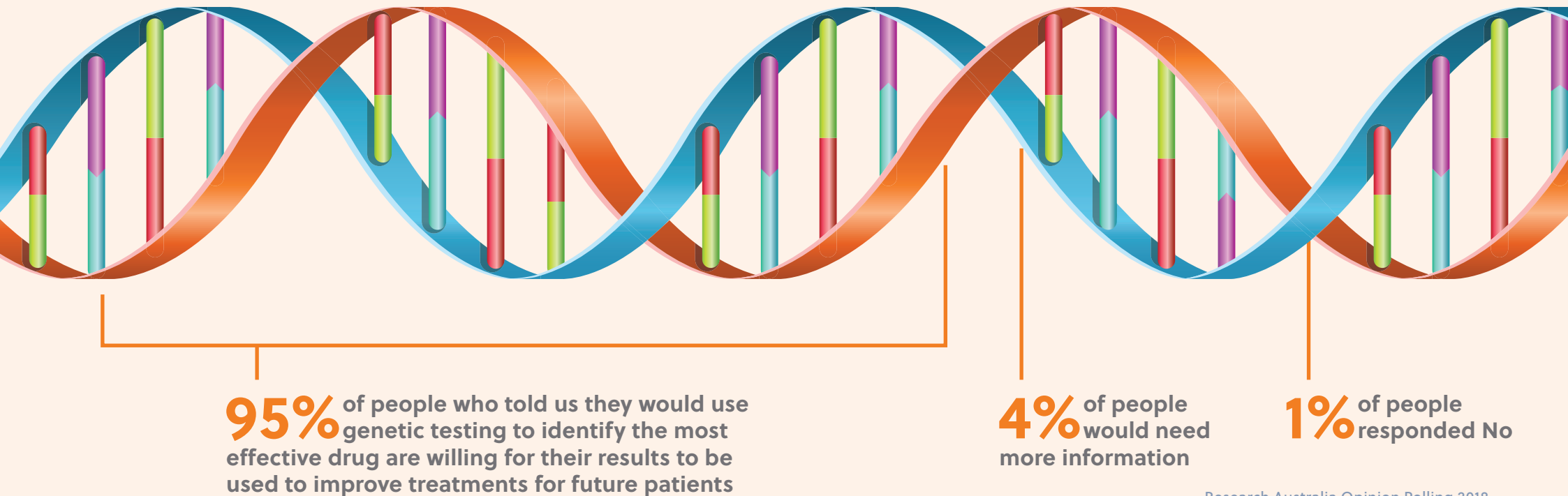


This technique only works because data collected from other people about their genetic makeup and what drugs did and didn't work has been compiled. This information is then used to identify links between some genes and particular drugs.

It relies on people who undergo treatment contributing their data, and as this library grows it becomes more accurate. But would someone undergoing this treatment be willing for their data and the results of their treatment to be collected and used in this way?

QUESTION:
Would you be willing for the results from your genetic tests and your treatment to be used to improve treatments for future patients?

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Technology plays an enormous role in our lives, including our health.

Modern hospitals are some of the most high tech places in the world, filled with machinery that helps diagnose, monitor and treat patients as well as to support surgery, deliver treatments and cures. Technology is used to keep hearts beating regularly, replace worn out joints and restore hearing.

More and more, technology is also helping us to manage our own health and wellbeing- reminding us to take our medication, motivating us to exercise and be more active, monitoring our vital signs for indications that something is wrong.

We asked people about their experience with, and acceptance of, technology to manage their health. The responses were overwhelmingly positive.

QUESTION:

Technology can help people to better manage their health. For example, activity trackers (fitbits) encourage people to be active, apps can remind people to take their medications or help them make healthy choices when shopping, and there are devices for home use that can do things like measure heart rate or blood pressure. Do you believe there is a role for technology in helping you to better manage your own health?

QUESTION:

Have you ever used technology to help you better manage your health? (This could include helping you exercise or diet, or manage medications, or something else.)

QUESTION:

Would you be willing to use technology in this way in the future?

91%
believe there is a role for technology in helping them better manage their health

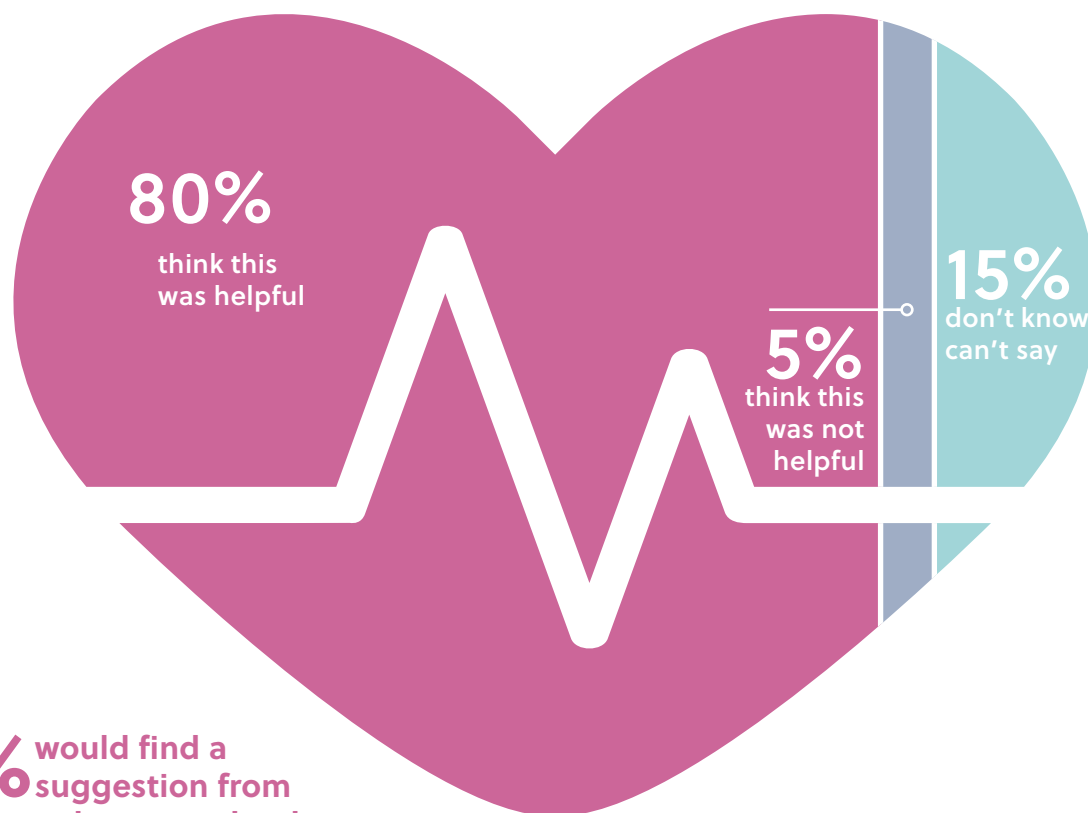
62% have already used or are using technology to better manage their health



90% are willing to do so in the future

In a world of ever advancing technology, numerous gadgets and phone apps, it's getting harder to know what you want or need.

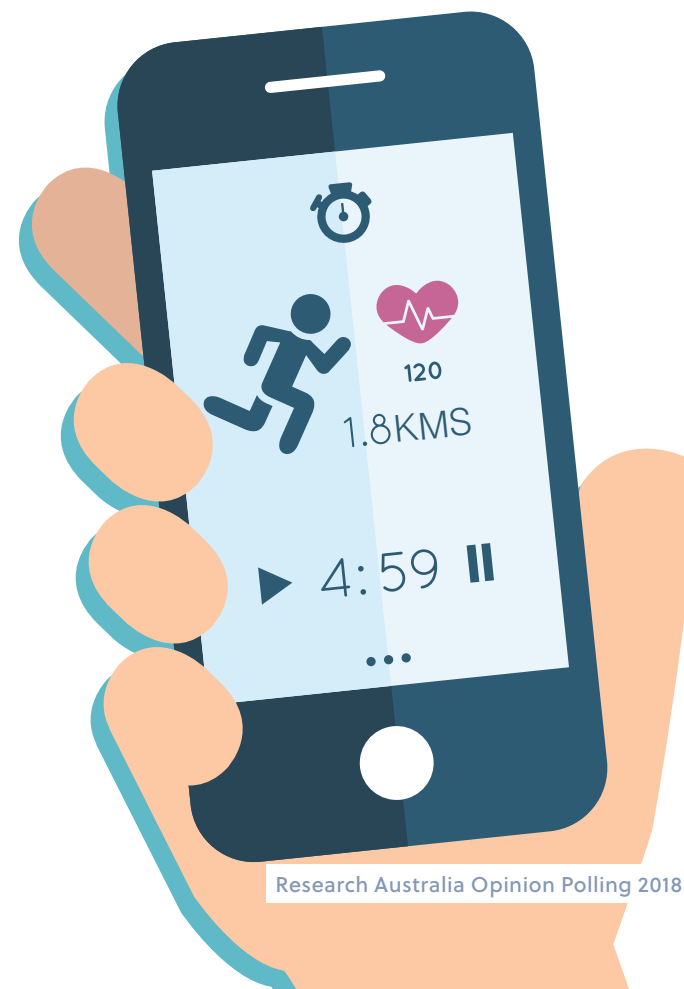
Many people simply ask the advice of an expert but when it comes to our health, we'd usually turn to our doctor. But would we trust them to give us advice about technologies?



80% would find a suggestion from their doctor about a technology to help them better manage their health to be helpful

QUESTION:
If a doctor suggested a technology I could use to manage my health better, I would...

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When we need information these days we are most likely to google it.

But how can we find trustworthy sources and reliable information with something as important as our health? One way of doing this is to use the internet in conjunction with your doctor.

Just as we asked people about how they would feel about recommendations from their doctor about technology, we also asked them about how they would feel about a doctor suggesting a website where they could find more information.

Doctors are under significant time pressure and there are some good sources of useful information about a range of health conditions available on the web to which a doctor can refer patients.

On the other hand, doctors may feel under pressure to provide all the information that their patient needs, believing this is what patients expect.

QUESTION:

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....."

80% would think this was helpful 15% would not think this was helpful
5% Don't know / can't say

Our polling suggests that doctors can be confident that most patients would welcome suggestions about where on the internet they can find further information, and this could be a useful part of a consultation.

PERSONAL HEALTH INFORMATION AND RESEARCH

The Australian Government is in the process of introducing an electronic health record for all Australians – the My Health Record. The intent is that the individual controls the information that goes on the record and who has access to it.

At Research Australia we were keen to understand how many people are aware of My Health Record and if they have created one.

63% of people had heard of the My Health Record (MHR). Perhaps more importantly, 42% of those who were aware of the My Health Record had created one for themselves, and 16% had created one for a dependent child.

The poll was conducted prior to the MHR opt out. Since then there has been much more attention focused on the implications of a national database. Concerns have been raised and it remains a current topic of discussion among stakeholders.



Support for the use of My Health Record data for research purposes is high, with 44% of people strongly in support and a further 46% somewhat in support. Only 1 in 10 are opposed.

QUESTION:
Have you heard of My Health Record?

QUESTION:
Have you created a My Health Record for: Yourself? Child/Children?

QUESTION:
Do you support or oppose the use of patients' de-identified medical records by health and medical researchers for research purposes?

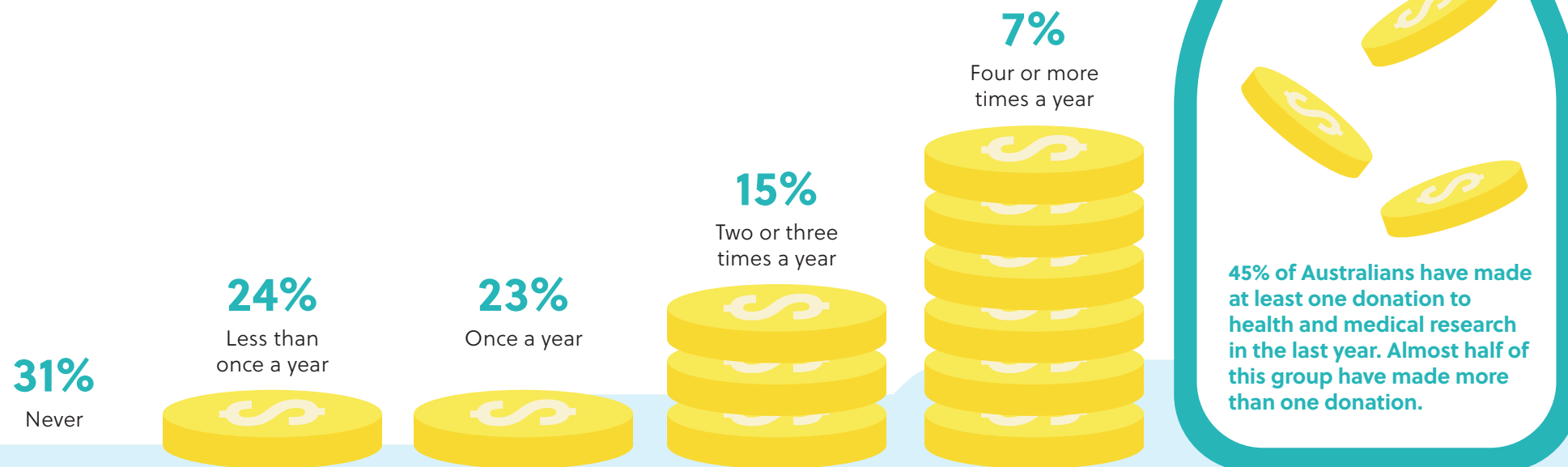
DONATIONS AND GOVERNMENT FUNDING

Support for health and medical research in the form of donations is widespread.

Much of the health and medical research in Australia is conducted in our universities and medical research institutes, which are eligible to receive tax deductible donations. Throughout the year there are many fundraising campaigns such as the

World's Greatest Shave™ and Jeans for Genes Day® all raising funds to support health and medical research. We asked people how frequently they donate to health and medical research.

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

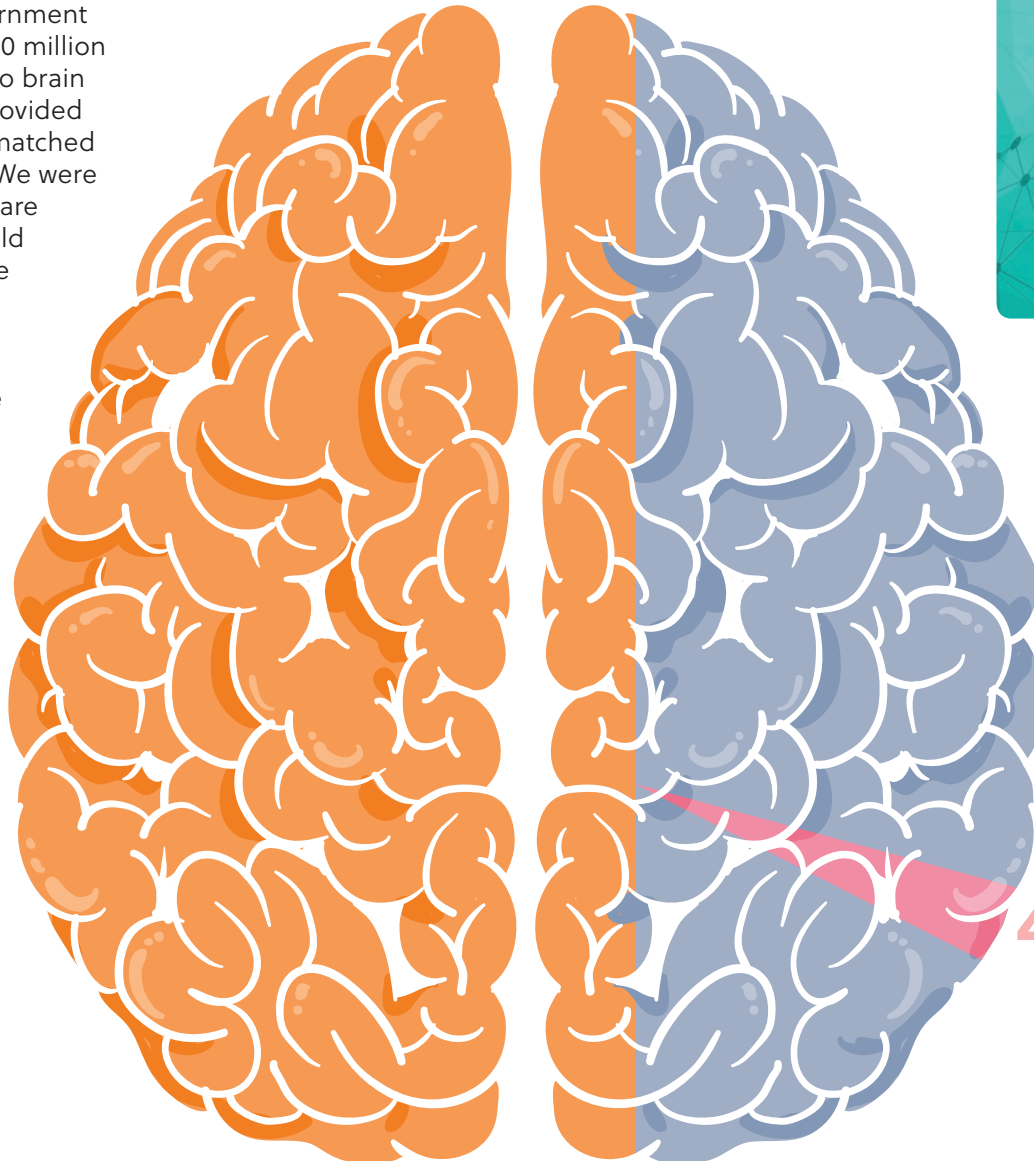


There is also an increasing tendency for the Australian Government to partner with charities to support research.

For example, in 2017, the Government announced it was providing \$50 million from the MRFF for research into brain cancers. The funding will be provided over several years and will be matched dollar for dollar by donations. We were curious to know if people who are already making donations would be encouraged to donate more if they knew the Government was prepared to match their donations. Or would they be discouraged by the knowledge that government funding was available?

53% More likely to donate to the charity

More than half of people (53%) who donate to health and medical research would be more likely to donate if the Government matched their donation.



QUESTION:
Governments sometimes partner with charities to jointly fund research into a particular disease. If you knew that the Government was going to match public donations to a charity to fund health and medical research, would you be:

- More likely to donate to the charity.
- Less likely to donate to the charity.
- It would make no difference to how much I would donate to the charity.

43% It would make no difference to how much I would donate to the charity

4% Less likely to donate to the charity

A SUGAR TAX TO REDUCE THE DAMAGE CAUSED BY HIGH SUGAR INTAKE

Globally, excess weight – especially obesity, is a major risk factor for cardiovascular disease, type 2 diabetes, some musculoskeletal conditions and some cancers.

As the level of excess weight increases, so does the risk of developing these conditions.

In addition, being overweight can hamper the ability to control or manage chronic conditions. 28% of Australian adults were overweight or obese in 2014-15, up from 19% in 1995.¹

One solution adopted in several countries, most recently in the United Kingdom, is a tax on sugary drinks. There have been growing calls for such a tax in Australia, but would the public support it?

The answer is Yes.

If the revenue raised from the tax is used to fund programs to reduce the damaging health effects, 45% definitely would support such a tax, and 27% would probably do so.



45% Definitely yes

Support is strongest (definitely yes) among those aged over 65 (55%) and people living in rural areas (56%)

27% Probably yes



13% Definitely no

The strongest opposition (definitely no) is from those aged 35-49 (18%)

12% Probably no



3% Can't say

QUESTION:

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?

Research is all about people... those who conduct it and those who benefit from the outcomes

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While the health and medical research (HMR) sector is being swept into a new era driven by advances in research and technology, the fact remains that the researcher, the academic institute, the pharmaceutical company or the charity are all supporting HMR in order to provide a better quality of life for the community tomorrow.

An important part of Research Australia's role is to help increase the level of health literacy in our country. We want to ensure Australians understand the connection between health and medical research and an improved health system. This means inclusion and sharing knowledge.

This is why our national polling is so vital. The challenges the HMR sector faces are complex and require a collective effort from everyone across the health and medical research pipeline – from researchers to patients.

When governments measure the return on investment in health and medical research, it is essential that this measure reflects the value society places on improved health outcomes.

As the national health bill inevitably grows, all governments are looking to the health and medical research sector for evidence-based practices to ensure we are delivering the safest and most efficient healthcare.

Research Australia must remain alert and agile in response to emerging issues and especially through our policy and advocacy work. To help us do this effectively we've identified 3 common areas:

1. Data and its transformative role in our health
2. Embedding evidence-based research in healthcare delivery
3. Encouraging smart investment in health and medical research that balances resources with needs, capacity and opportunity

It is only right that health and medical research is front and centre and we look forward our ongoing role in this significant space.

Thank you to all the Research Australia members who truly show their leadership in the sector by actively supporting their national peak body and help us drive change with one voice aligned on a common platform.



Sir Gustav Nossal AC CBE says 'I am proud to be Patron of an organisation so uniquely placed to bring together the many pieces of such a complex system and I watch with great excitement the emerging opportunities and bold ideas that will transform healthcare for Australians.'

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: | 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: | 1,000 |
| Actual Sample Size: | 1,016 |
| 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: | Friday 15 June to Wednesday 20 June, 2018. |
| 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: | 9.2% |
| 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 |

ABOUT RESEARCH AUSTRALIA

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Research Australia is the national alliance representing the entire health and medical research pipeline from the laboratory through to the patient and the marketplace. The organisation uses its unique convening power to position health and medical research as a significant driver of a healthy population and contributor to a healthy economy.

OUR VISION

Research Australia envisions a world where Australia unlocks the full potential of its world-leading health and medical research sector to deliver the best possible healthcare and global leadership in health innovation.

“Roy Morgan are proud to partner with Research Australia on this important research”

Michele Levine, CEO of Roy Morgan Research



ROY
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OUR GOALS

CONNECT researchers, funders, and consumers to increase investment in health and medical research from all sources.

ENGAGE Australia in a conversation about the health benefits and economic value of its investment in health and medical research.

INFLUENCE government policies that support effective health and medical research and its routine translation into evidence-based practices and better health outcomes.

Research Australia Opinion Polling 2018

The background is a complex, abstract network of thin, dark teal lines connecting various sized circular nodes. The nodes are also in shades of teal, some appearing as solid dark circles and others as lighter, semi-transparent circles. The overall composition is dense and organic, resembling a molecular structure or a digital network map. The color palette is monochromatic, using different shades of teal and blue.

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