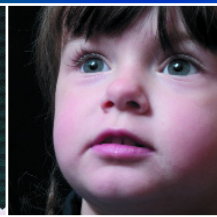
Health & Medical Research Public Opinion Poll 2005













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An alliance for discoveries in health



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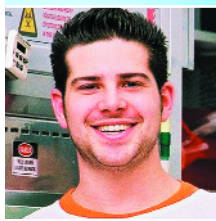
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Acknowledgements

Crosby|Textor

Research Australia thanks Crosby|Textor for conducting this public opinion poll and for supporting our activities.

Crosby|Textor is a boutique polling and communications consultancy that delivers actionable, quality-driven market research to Corporations, Industry Associations and Government. The combined experience of its staff in researching the opinions, hopes, concerns, motivations and values of people in over 35 countries, provides Crosby|Textor with unique and extensive insight into public views around the world.

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Foreword

Australians are looking to the future. Investing in health and medical research is considered to be critically important as it is the best way of investing in Australia's future and health. *"It is our future. Looking after our children and grandchildren."*

In this, Research Australia's fourth annual Public Opinion Poll conducted by Crosby|Textor, the Australian community has again demonstrated outstanding support for the importance of health and medical research for current and future generations.

Delving into what Australians see as the most important health issues requiring increased health and medical research funding, the 2005 Poll also examines the varying views of subgroups within the community. While extraordinarily strong support is expressed overall, it is highest in women and older Australians. Younger Australians were both aspirational and practical in relation to health and medical research and want to see Australia well positioned globally. Younger people more readily identified wider economic benefits such as job creation, exports, savings on the cost of buying knowledge into the country, and even considerations about the cost and access to biotechnology and medical supplies during times of war.

Qualitatively, there were high levels of unprompted awareness of innovations in health and medical research initiated in Australia. There was, however, a related concern that as a nation we do not capitalise on the fruits of our innovation, resulting in many of our ideas going offshore for commercial development.

Looking for greater life expectancy and illness prevention and cure, Australians are also looking to improve life enjoyment and productivity through health and medical research. Cancer is a top of mind issue in our community, while significant "lifestyle" conditions such as heart disease, mental illness and addiction, diabetes and obesity are also emerging as key issues.

Australians believe the Federal Government has primary responsibility for health and medical research and seek leadership from the Government to ensure that, as a nation, we address funding tomorrow's solutions today, both for the direct benefit in terms of practical health outcomes and to ensure that we do not fall behind the rest of the world.

Government, industry and the research community should be encouraged by the strength of community support.

Dr Chris Roberts
Chairman

Dr Christine Bennett
Chief Executive Officer





Methodology

Research Australia commissioned Crosby|Textor to conduct qualitative and quantitative research on the attitudes and perceptions of the community toward health and medical research. Qualitative research was through focus groups and quantitative research conducted through an on-line survey.

Focus Groups

Qualitative research was designed to uncover ideas and leads to guide formulation of questions for the quantitative survey and to provide depth and insights into findings and recommendations. Two focus groups each of 9-10 participants were held in June 2005. One group was conducted among 55+ year old retirees, including a 50/50 mix of pensioners and self funded retirees. One group of 25-54 year olds, were men employed full time and women employed either full time or on home duties with dependent children aged under the age of 18 living in their care and no participants reliant on Government benefits for the majority of their income.

Insights from focus groups

Qualitatively, the community perceives that the core benefit of health and medical research is improving health standards. Investing in health and medical research is also considered to be critically important as it is the best way of investing in Australia's future health.

"If they spend money on health now, it is an insurance policy that we can work longer and better. So it is like an insurance policy. Spend money on research now you reap it back in 20-40 years."

Specific health benefits that health and medical research are perceived to bring to Australia include:

- Cures to illnesses
- Improving life enjoyment
- Preventing illness
- A more productive workforce.
- Improving life expectancy

While older people considered health and medical research is a means to ensure Australia enjoys the best possible health attention, younger people more readily identify wider economic benefits such as job creation, exports, savings on the cost of buying knowledge into the country and even consideration about the cost and access to biotechnology and medical supplies during times of war. Australians are generally considered to be quite innovative, having made a number of discoveries with the capacity to contribute more in the future but there is concern that we often do not capitalise on the fruits of our innovation, resulting in many of our ideas going offshore.

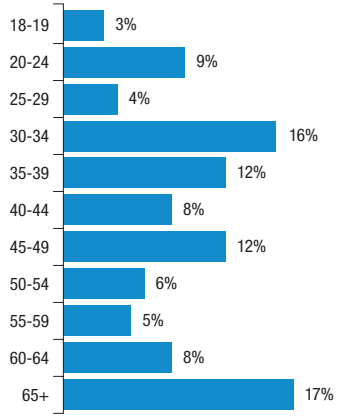
"We can't appreciate our own technology and they go overseas. The drain on the brain trust."

Demographic profile

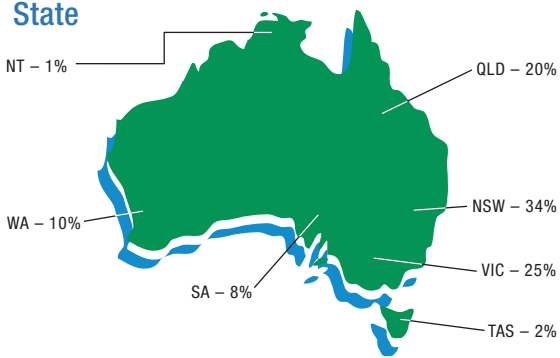
Quantitative

Quantitative research was conducted between 6-15 July 2005 as an on-line survey, with an effective sample of 628 respondents, 18 years of age and older, Australia wide. The maximum margin of error for a sample size of approximately 630 is ±3.9 percentage points in 95 out of 100 cases. The sample was drawn from a permission based online research panel with over 300,000 registered members. Quotas were placed on the survey to ensure that the final sample followed population distributions by gender (female 51%, male 49%), age and area.

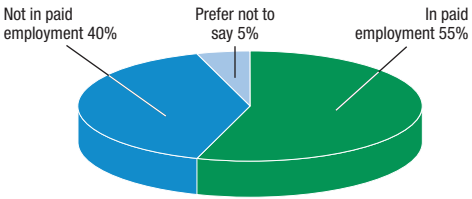
Age



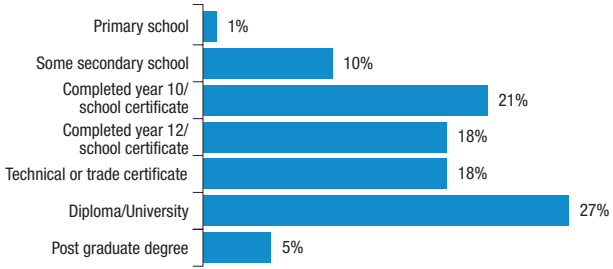
State



Employment



Highest level of Education



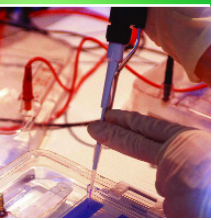




Education and medical and health research are most important to Australia's future

Question: Following are a list of industries and sectors that may or may not play an important role in Australia's future. For each industry or sector please rate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree that it should play an important role in Australia's future.

- Of a range of industries and sectors, education and medical and health research were considered the two most important for Australia's future.
- On a par with Education, 78% of Australians strongly agree that medical and health research should play an important role in Australia's future.
- Females and older Australians in particular strongly agree.





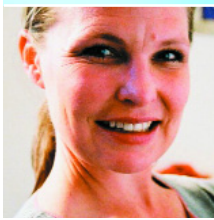
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Health and medical research a high priority for Federal Government over the next 2-3 years

Question: How important do you personally think each of the following issues are, as an important priority for the Federal Government to be focusing on over the next 2-3 years. (On a 1 to 10 scale – 1 means that it is not so important a priority; 10 means that it is an extremely important or critical priority).

- 82% of Australians strongly agree that more research funding for health and medical research is an important priority for the Federal Government to be focusing on over the next 2-3 years.
- Of the 22 listed priorities, Australians rated health and medical research the sixth highest priority for the Federal Government, with improving hospitals and the health-care system rated highest.
- Females and older Australians in particular were more likely to score the importance of health and medical research highly.





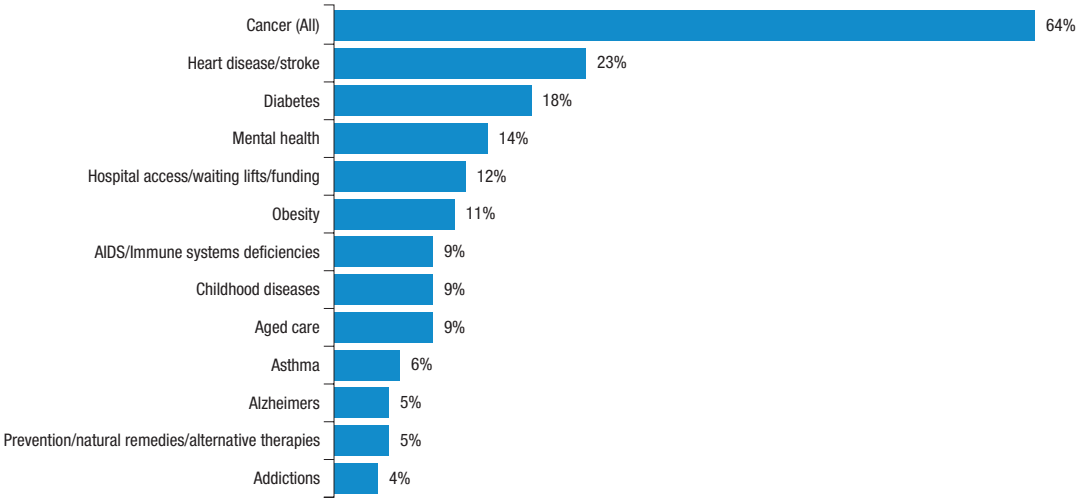
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Cancer is perceived as the top disease requiring a significant increase in funding for prevention and cure

Question: In your opinion, what, specifically, are the three most important health and medical problems, issues or diseases to you, your family or to Australia as a whole that should receive a significant increase in funding for research into their prevention and cure?

- Cancer (mentioned by 64% of people) dominates as the health issue Australians believe is the most important health and medical problem, issue or disease that should receive a significant increase in funding for research into its prevention and cure, ahead of heart disease.





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Prevention is the best cure and our ageing population needs more health and medical research

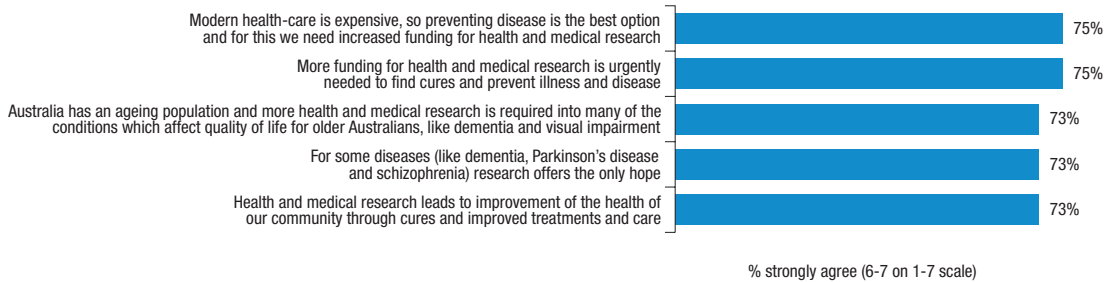
Question: Following is a list of possible arguments or reasons for a significant increase in the level of research funding for health and medical research in Australia. Indicate your level of agreement with each statement on a 1-7 scale – 1 means that you strongly disagree and 7 means you strongly agree.

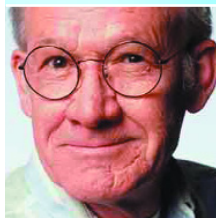
75% of Australians strongly agree that:

- Modern health-care is expensive, so preventing disease is the best option and for this we need increased funding for health and medical research.
- More funding for health and medical research is urgently needed to find cures and to prevent illness and disease.

73% of Australians strongly agree that:

- Australia has an aging population and more health and medical research is required into many of the conditions which affect quality of life for older Australians like dementia and visual impairment.
- For some diseases (like dementia, Parkinson's disease and schizophrenia) research offers the only hope.
- Health and medical research leads to improvement of the health of our community through cures and improved treatments and care.





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Australians agree with the health value of health and medical research

Question: Following is a list of possible arguments or reasons for a significant increase in the level of research funding for health and medical research in Australia. Indicate your level of agreement with each statement on a 1-7 scale – 1 means that you strongly disagree and 7 means you strongly agree.

The majority of Australians strongly agree that:

- More health and medical research is urgently needed to address some of the essential Australian health issues (71%).
- Health and medical research improve life expectancy and wellness (70%).
- Everyone, everyday benefits from health and medical research (63%).
- Australian health and medical researchers are among the world's best (62%).
- Australia has a responsibility to be a good international research citizen – to foster and support Australian global research endeavours (56%).





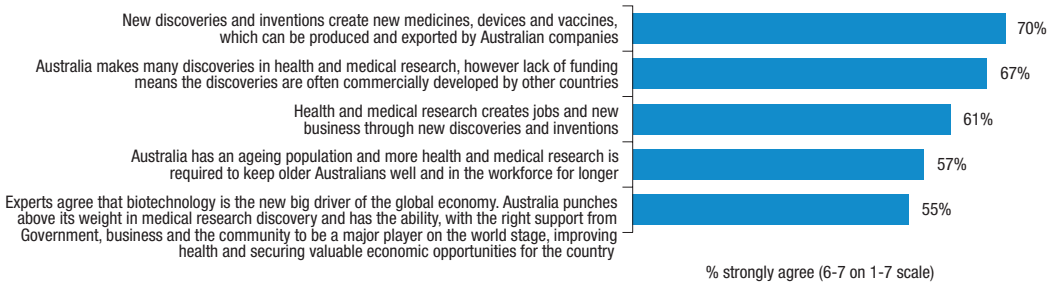
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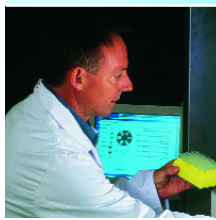
Australians agree with the economic benefits of health and medical research

Question: Following is a list of possible arguments or reasons for a significant increase in the level of research funding for health and medical research in Australia. Indicate your level of agreement with each statement on a 1-7 scale – 1 means that you strongly disagree and 7 means you strongly agree.

The majority of Australians strongly agree that:

- New discoveries and inventions create new medicines, devices and vaccines to produce and export (70%).
- Lack of funding means that Australian discoveries are often commercially developed by other countries (67%).
- Health and medical research creates jobs and new business through new discoveries and inventions (61%).
- Australia has an ageing population and more health and medical research is required to keep older Australians well and in the workforce for longer (57%).





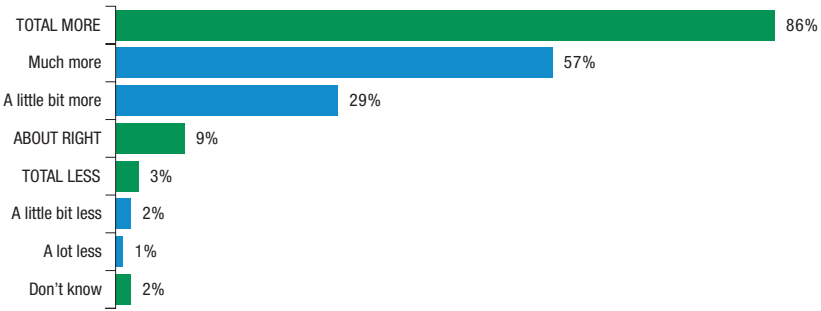
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The majority of Australians would like to see much more government funding for health and medical research

Question: In 2003 the Australian Commonwealth Government's investment in research funding for health and medical research in Australia represented approximately 0.12% of GDP (Gross Domestic Product), compared to an average of approximately 0.2% of GDP in other OECD countries such as the USA, Canada and the UK. Given this, in your opinion should the Commonwealth Government's research funding for health and medical research in Australia be much more, a little bit more, a little bit less or much less than its current contribution of approximately 0.12% of GDP – or do you think that level of funding is about right?

- More than half (57%) of Australians believe the Commonwealth Government's research funding for health and medical research in Australia should be **much more** than the 0.12% GDP it received in 2003. A further 29% of Australians believe funding levels should be a **little more**.
- A significantly higher percentage of postgraduate qualified Australians (71%), Australians aged 50+ (64%) and those not in paid employment (64%) support much more funding for health and medical research.



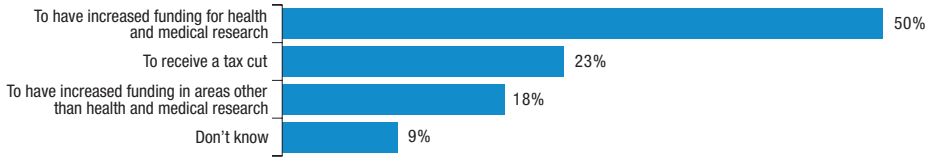
How much to change health and medical research funding

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50% of Australians would prefer surplus government funds to be spent on health and medical research

Question: How would you prefer to have surplus government funds distributed? Would you prefer to have increased funding for health and medical research; to have increased funding in areas other than health and medical research or to receive a tax cut?

- In relation to the distribution of surplus government funding, half of Australians would prefer to have increased funding for health and medical research, whilst less than half this number (23%) would instead prefer to receive a tax cut and 18% would prefer increased funding in areas other than health and medical research.
- Greatest support for increased funding for health and medical research in preference to a tax cut came from older Australians (63%) and those not in paid employment (62%).



Preference for distribution of surplus government funds



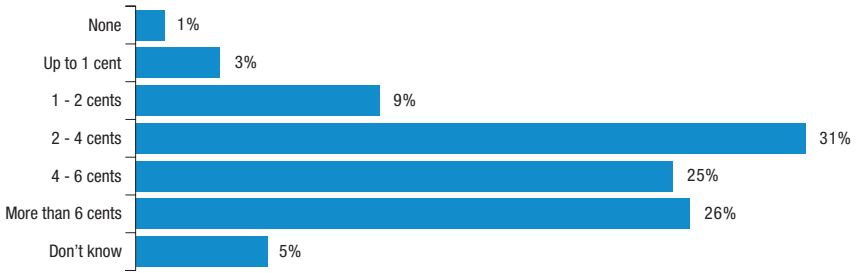
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Australians want more out of each health-care dollar spent on health-related research

Question: In 2000-2001, between 1-2 cents out of each health-care dollar spent in Australia went to health-related research. How many cents out of each health-care dollar do you think should be spent on health-related research?

- Rather than the 1-2 cents of each health-care dollar spent on health-related research in 2000-2001, 82% of Australians believe 2 cents or more should be spent on health-related research and over half (51%) believe the figure should be more than doubled to over 4 cents.



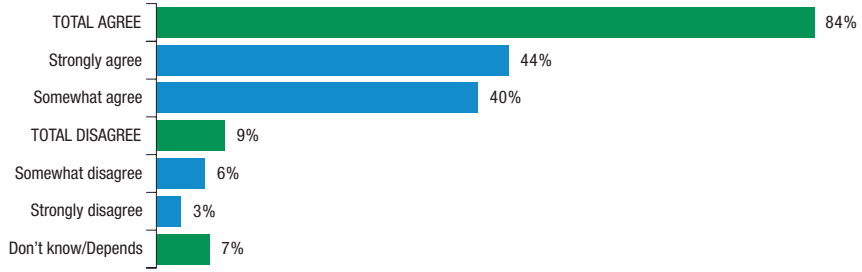
How many cents should be spent on health-related research funding out of each health-care dollar

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Australians want access to the latest in health-care, even if this means increased taxes or redirecting spending

Question: Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that Australians should have access to the latest medicines, medical devices and clinical treatments, even if this means increased taxes or redirecting spending from other areas?

- The overwhelming majority (84%) of Australians agree that Australians should have access to the latest medicines, medical devices and clinical treatments, even if this means increased taxes or redirecting spending from other areas.



% agreement for access to latest medicines, devices and treatments



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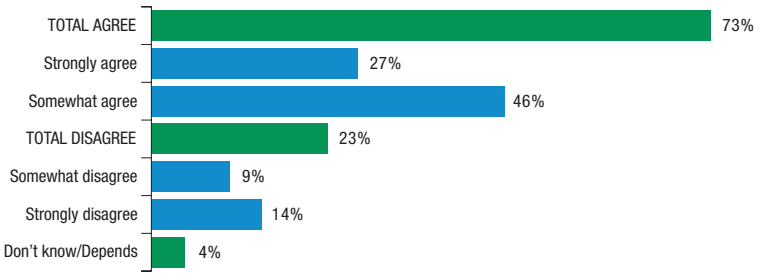


Support for tax incentives for biotechnology and pharmaceutical companies to fund and conduct R&D in Australia

Question: Please indicate whether you: strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement:

"The Federal Government should provide tax incentives for multi-national biotechnology and pharmaceutical companies to fund and conduct research and development in Australia."

- The majority (73%) of Australians are in general agreement that there should be tax incentives for biotechnology and pharmaceutical companies to fund and conduct R&D in Australia.



% agreement for R&D tax incentives

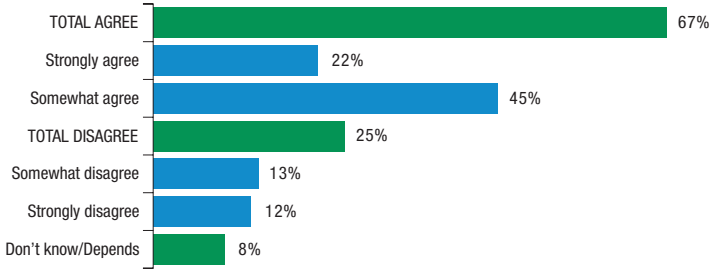
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Tax concessions available to companies investing in health and medical research should be higher

Question: Please indicate whether you: strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement:

"Tax concessions available to companies investing in health and medical research should be higher."

- The majority (67%) of Australians generally agree that tax concessions available to companies investing in health and medical research should be higher; 22% strongly agree and 45% somewhat agree.



% agreement for higher R&D tax concessions



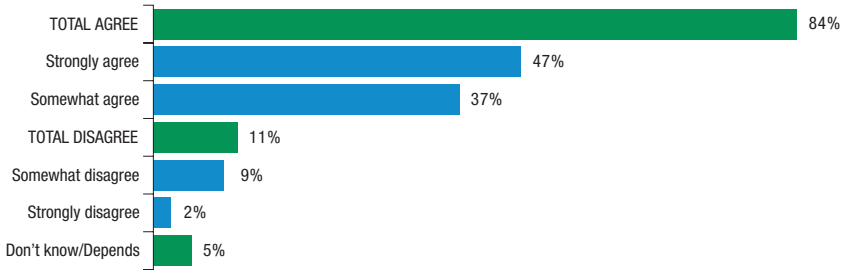
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Large Australian corporations should donate to health and medical research

Question: Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that large Australian corporations should donate to health and medical research as a way of giving back to the community?

- 84% of Australians agree that large Australian corporations should donate to health and medical research as a way of giving back to the community.





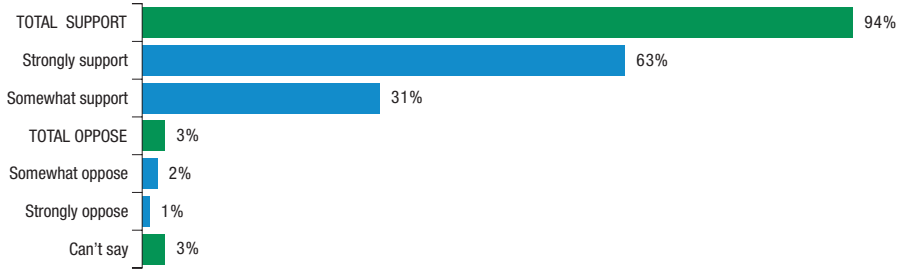
% agreement for corporations to donate to health and medical research

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Support for increased public awareness and information on health and medical research

Question: Do you strongly support, somewhat support, somewhat oppose or strongly oppose Research Australia's goal to increase public awareness and information on health and medical research?

- Support for Research Australia's goal to increase public awareness and information on health and medical research was strong, regardless of whether respondents were aware of Research Australia.
- The greatest support was amongst the over 50's (71% strongly support), non-city dwellers (69% strongly support) and females (68% strongly support).



% agreement for increased public awareness and information on health and medical research



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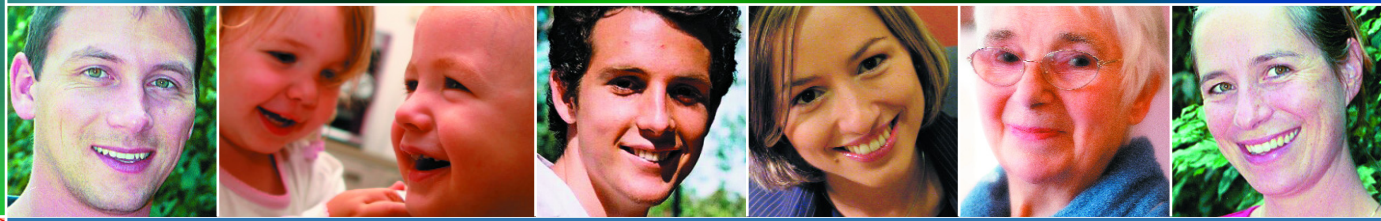
Supporters – Platinum • National Health & Medical Research Council (NHMRC)

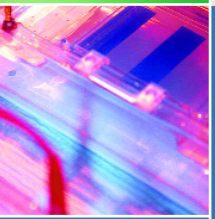
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