CROSBY | TEXTOR
RESEARCH STRATEGIES RESULTS

Research Australia
Public Opinion Research 2007

Final Report

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Crosby|Textor
Research Strategies Results Pty Ltd
ABN 58 101 934 454

Suite 7, Level 2, Engineering House,
11 National Circuit, Barton
ACT 2600 Australia

PO Box 3632,
Manuka
ACT 2603 Australia

Phone +61 2 6253 6777
Fax +61 2 6253 6799
www.crosbytextor.com

Contents

Methodology **3**

Demographic Profile of Survey Respondents **4**

Detailed Findings **6**

Chart 1: Federal Government Priorities over Next 2-3 Years (% Important) – Trend 7

Chart 2: Industries Playing Important Role in Australia's Future (% Agree) – Trend 8

Chart 3: Government Should Focus on Innovative Industries – Trend 9

Chart 4: Responsibility for Funding Health & Medical Research (Mean %) – Trend 10

Chart 5: Support for Federal Government NHMRC Funding – Trend 11

Chart 6: Future Preference for Federal Government Funding 12

Chart 10: Statements for Research Funding Increases (% Agree) – Trend 13

Chart 11: Statements for Improving Overall Health Outcomes (% Agree) 16

Chart 7: Most Important Health/Medical Problems for Funding (1st Nominated NETS) – Trend 17

Chart 9: Importance of Health & Medical Issues (% Extremely/Very Important) 18

Chart 12: Statements for Possible Developments from Research (% Agree) 19

Chart 13: Statements for Actions & Initiatives in Relation to Obesity (% Agree) 21

Chart 8: Usefulness of Information Sources (% Useful) – Trend 22

Chart 14: Global Warming Beliefs 24

Chart 16: Environmental Problems Affecting Own Health 25

Chart 17: Use of Desalinated & Recycled Water – Summary 26

Chart 18: Confidence in Health & Medical Treatments – Summary 28

Chart 19: Use of Health & Medical Treatments – Summary 29

Chart 20: Use of Natural Remedies – Summary 30

Chart 21: Whether Natural Remedies Work or Not – Summary 31

Chart 22: More Likely to Use if Had More Information – Summary 32

Chart 24: Opinions of Own Eating Habits 34

Chart 25: Number of Times per Week do 20 Minutes or More Exercise 35

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Methodology

Although the most sophisticated procedures have been used to collect and analyse the information presented here, it must be remembered that surveys are not predictions. They are designed to measure public opinion within identifiable statistical limits of accuracy at specific points in time. This survey is in no way a prediction of opinion or action at any future point in time.

This report contains results from both qualitative and quantitative research.

Two focus groups were conducted in Melbourne in July 2007: one group amongst retirees and semi-retirees aged 55 and older (including a 50/50 mix of pensioners and self-funded retirees) and one group of 25-54 year olds where men were employed full-time and women were either employed full-time or on home duties with dependent children aged under 18 living in their care; no 25-54 year-olds relied on government benefits for the majority of their income.

The quantitative research consisted of an online survey conducted among an effective national sample of n=630 voters 18 years of age and older Australia-wide, stratified by gender, age and postcode and conducted between 21-30 August 2007.

Crosby|Textor typically uses qualitative (percentages or proportions) and quantitative (averages or means) measures in its survey designs. In general, for a qualitative measure, the maximum margin of error for a sample size of approximately n=630 is ±3.9 percentage points in 95 out of 100 cases with results at around 50%.

It should be understood, however, that this margin of error only applies to measuring a proportion based on the total sample. Margins of error will be different for comparisons between sub samples and for quantitative measures, such as means derived from ratings scales.

Any variation in reported percentages of ±1% in this report is due only to rounding. In reporting of figures “0%” denotes mentioned by less than 0.5% and “--” denotes not mentioned or no difference.

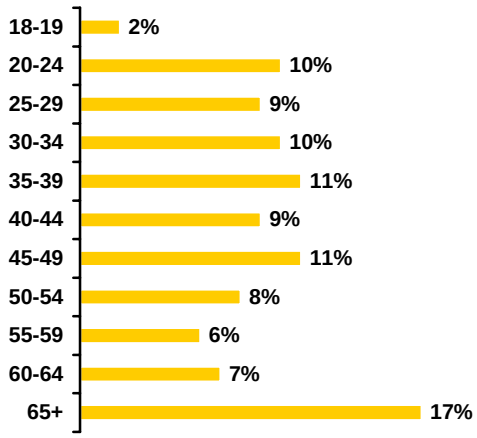
Verbatims used for illustrative purposes are taken directly from the focus groups and may have been edited for brevity.

This document will be accompanied by, and is subject to, a verbal strategic debrief by Crosby|Textor.

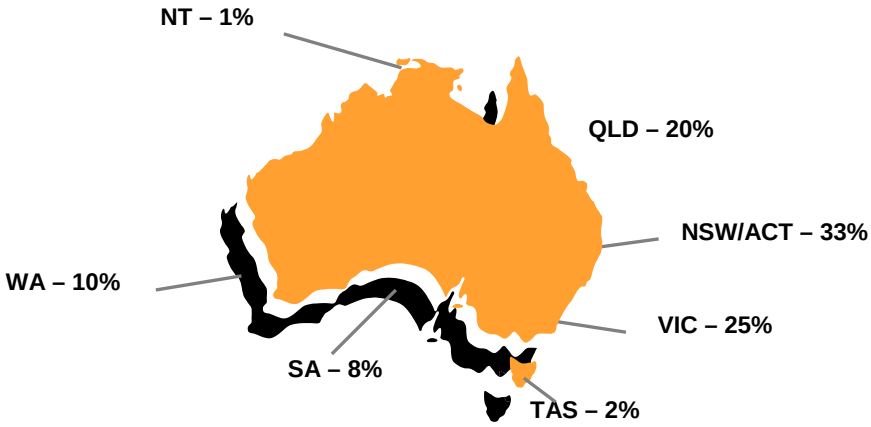
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Demographic Profile of Survey Respondents

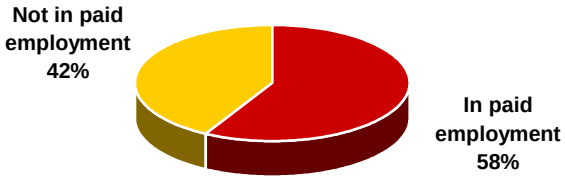
Age



Location

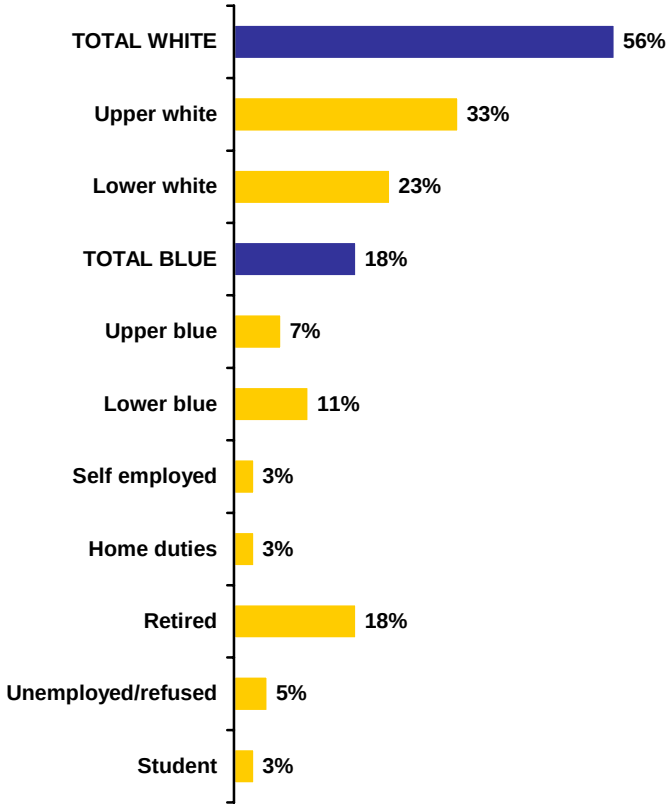


Employment

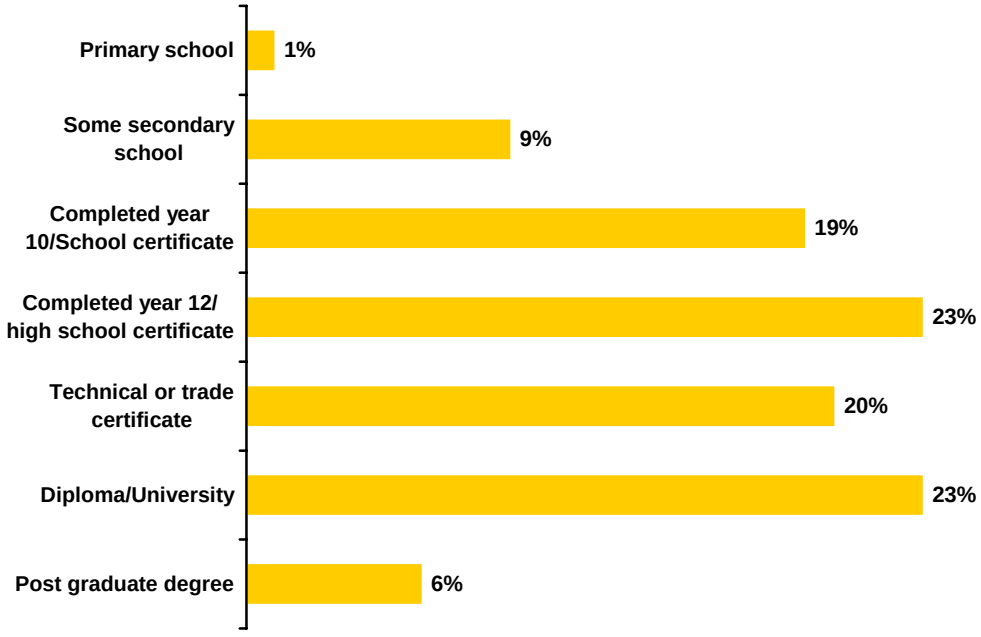


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Work and household status



Highest level of education



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Detailed Findings

Health continues to be the greatest concern to Australians

Consistent with previous years, health continues to be the number one issue of concern to Australians (Chart 1). It is the top national priority they believe governments should be addressing and they see health as fundamental to the nation's social and economic future. The short and long-term cost of illness to the nation is well understood.

> *"I think that the word future is something that we all need to be seriously looking at – our country's future, the future of our children, and health is a primary thing, if you don't have your health, you have no future."*
>
> *"If you're not well, it costs money – ends up costing the Government."*
>
> *"A well person can look after themselves and not be a burden on the rest of the population whereas an ill person does cost a lot of money to support."*

Health and medical research along with education top the list of industries Australians believe will play an important role in the country's future (well ahead of mining and resources, and tourism and hospitality) both for the well-being of the community and the economic benefits (Chart 2).

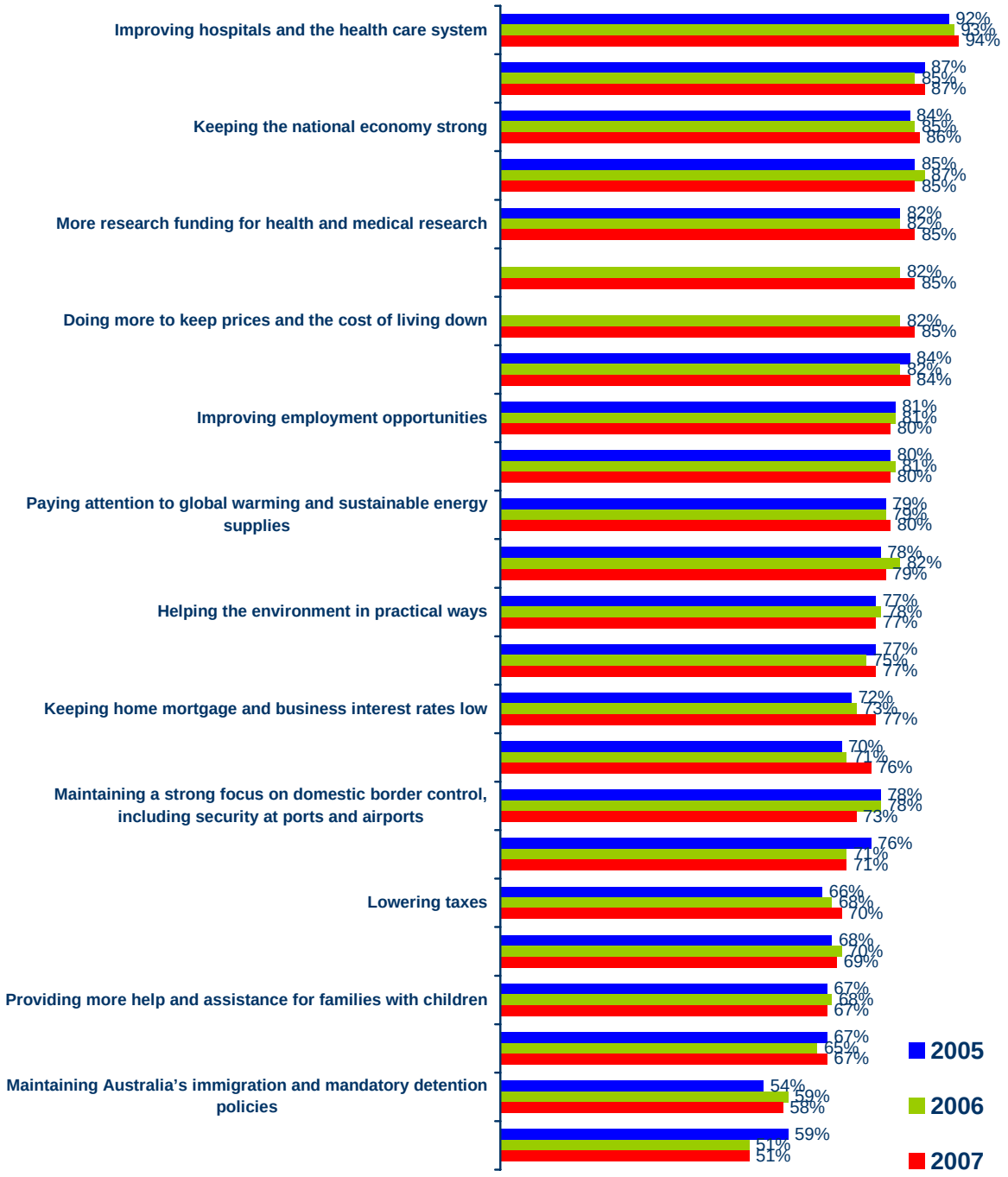
> *"Improve the quality of life for the population around Australia."*
>
> *"Because it will save money in the future."*
>
> *"Any new inventions, new cures are sold overseas – it brings money into the country."*

Four out of five Australians (80%) agree that with the demise of the nation's manufacturing base to countries like China and India it is a smart move by the Federal Government to focus more on innovative industries such as health and medical technologies and research (Chart 3).

> *"You have to develop new industries because I mean manufacturing is gone …it's a…post-industrial society, isn't it now."*
>
> *"Manufacturing's gone overseas, so new industries have to be in the high tech field."*
>
> *"Being competitive in a global economy, we've got to be high tech."*
>
> *"We do have the brain power here – and it could bring in a lot of economy and money to the country – by being in the forefront in that field – and we have the ability."*
>
> *"You've got to have a culture that is friendly to [scientists]…like Silicone Valley in California is friendly to IT people."*

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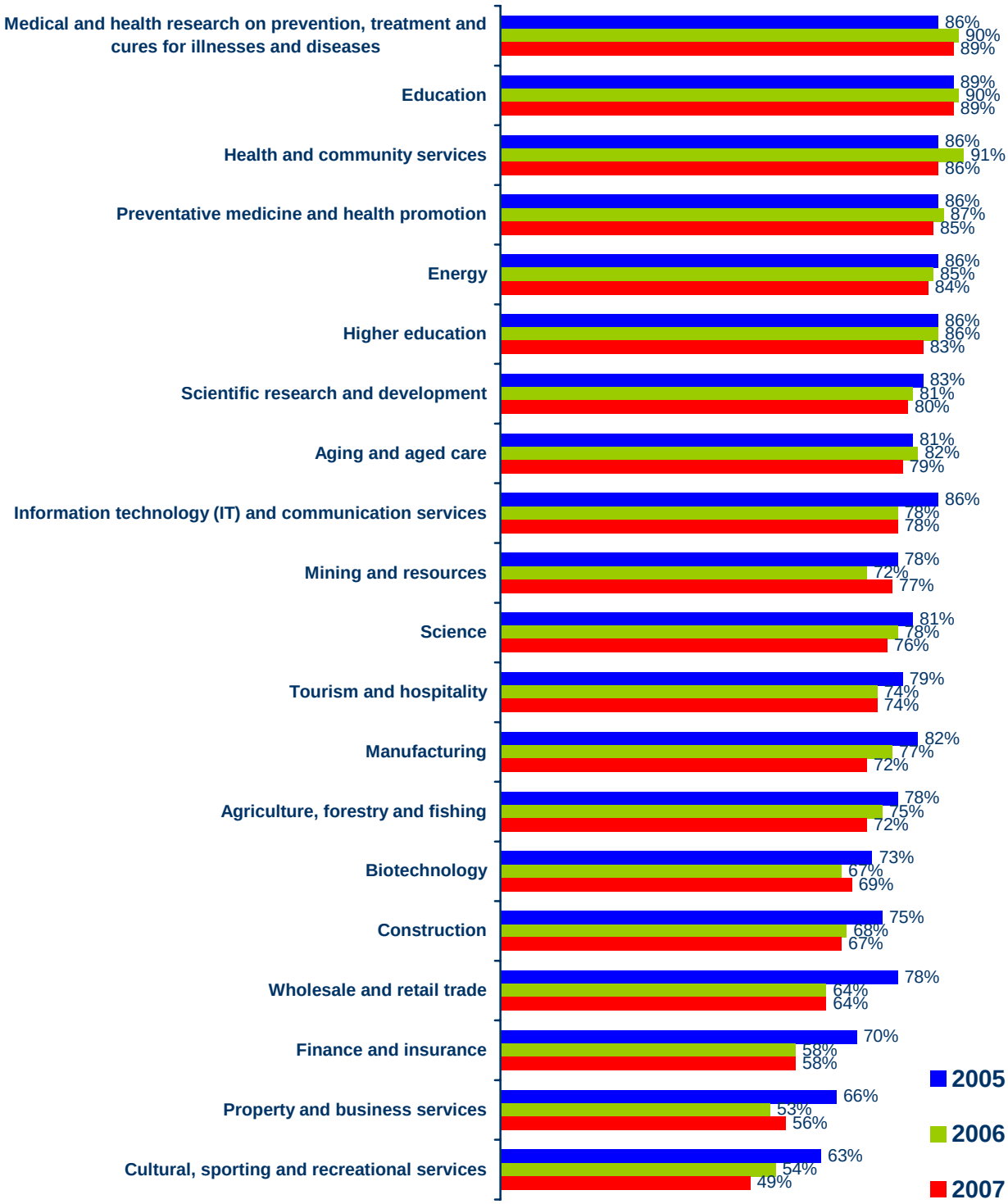
Chart 1: Federal Government Priorities over Next 2-3 Years (% Important) – Trend



Q1) 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 an important 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 so important a priority up to a 10 means that it is an extremely important or critical priority for the Federal Government to be focusing on over the next 2-3 years.

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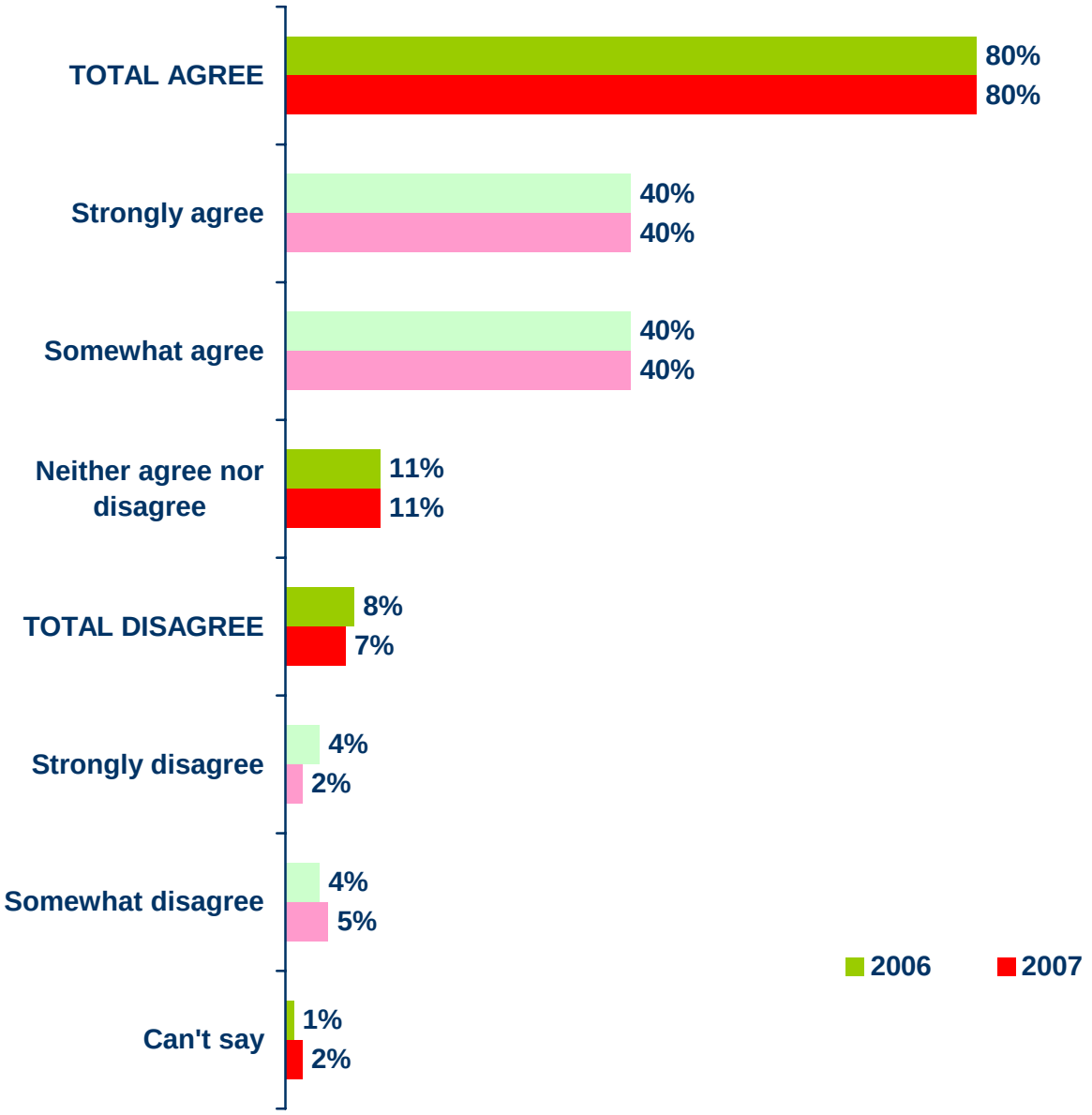
Chart 2: Industries Playing Important Role in Australia's Future (% Agree) – Trend



Q2) Following is 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 WILL play an important role in Australia's future.

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Chart 3: Government Should Focus on Innovative Industries – Trend



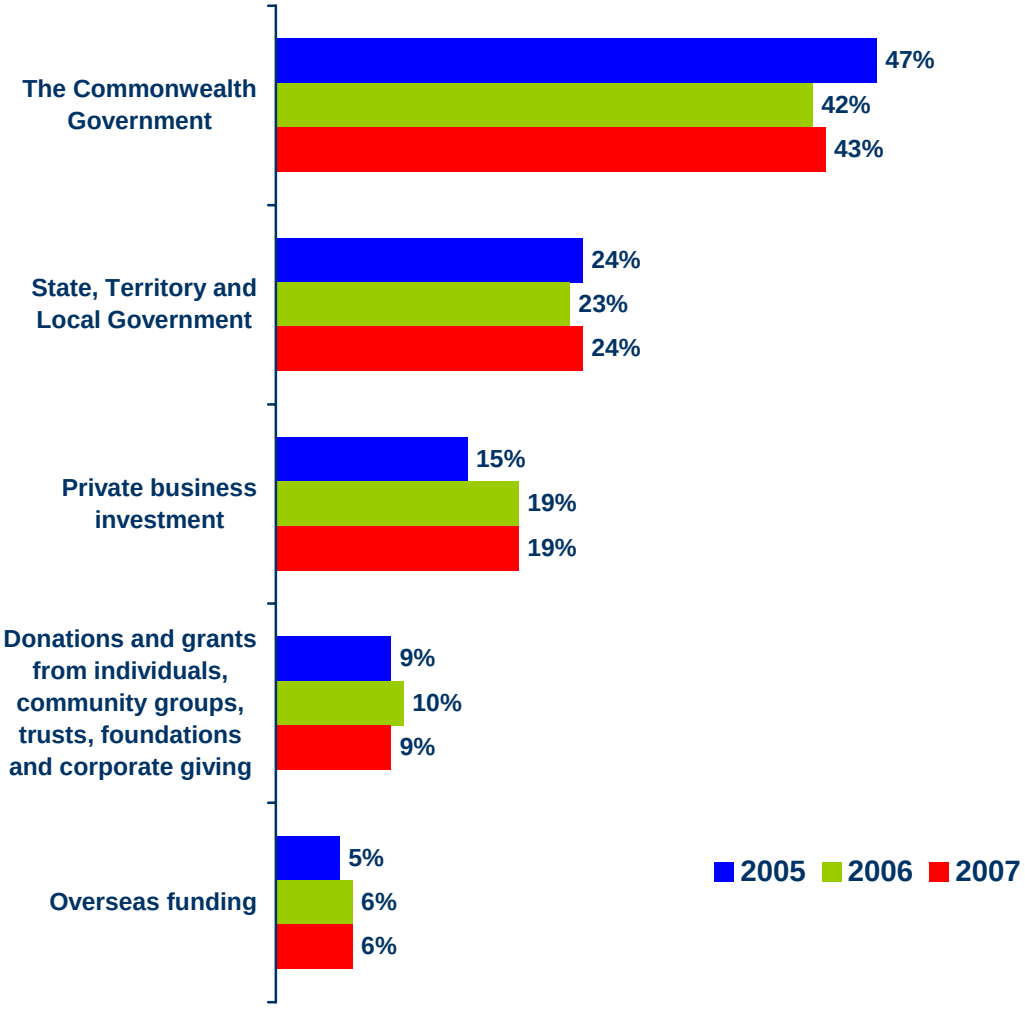
Q3) Given the loss of traditional manufacturing industries in Australia to countries like China and India, do you agree or disagree that it is a smart move by the Federal Government to focus more on innovative industries such as health and medical technologies and research? Is that strongly or somewhat agree/disagree?

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Australians support increases in health and medical research funding

On average Australians think Governments should provide about two-thirds of the funding overall for health and medical research (Commonwealth 43%, State 24%), with corporate philanthropy, individual donations and giving and private business funding making up the shortfall (Chart 4).

Chart 4: Responsibility for Funding Health & Medical Research (Mean %) – Trend

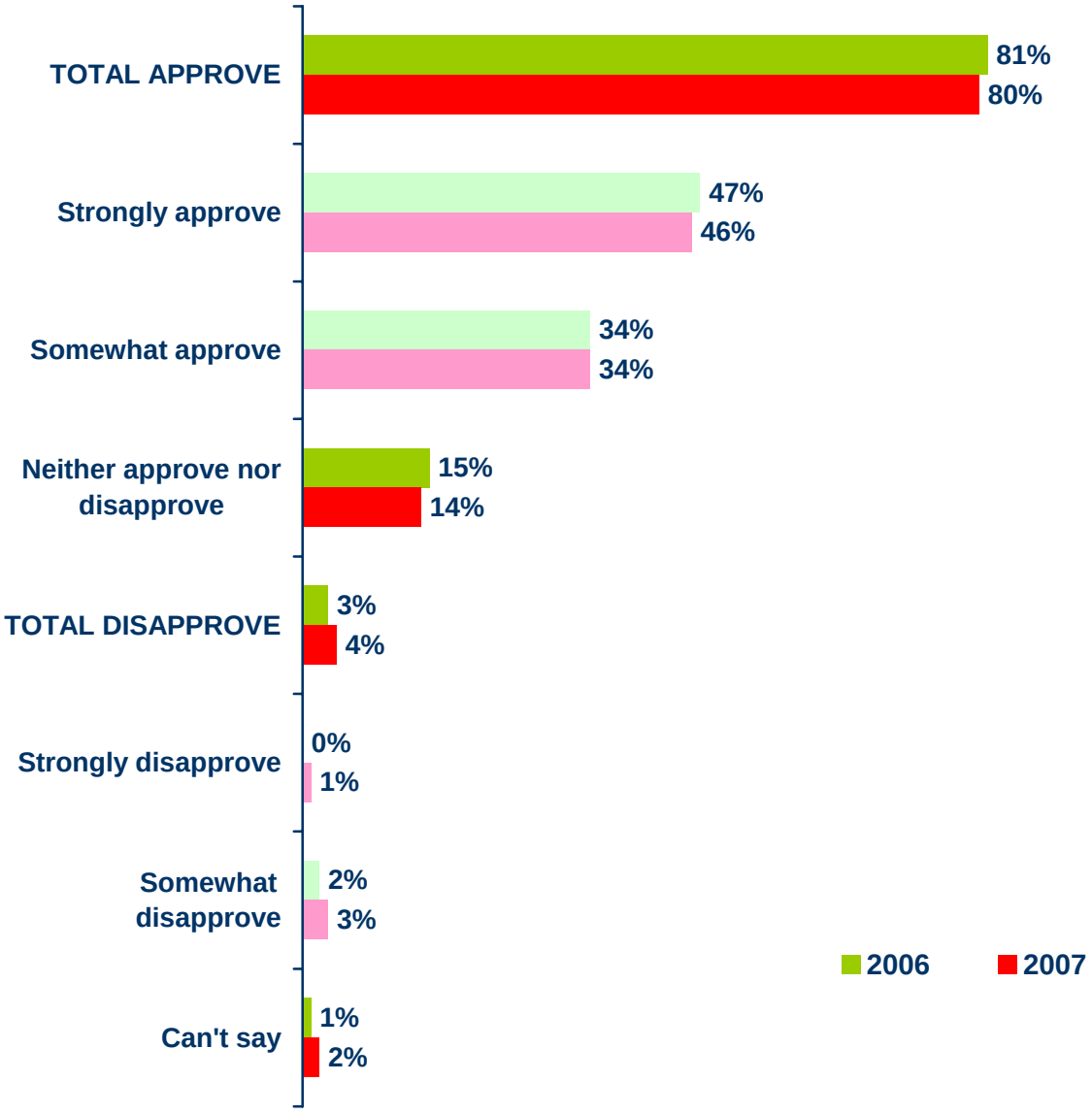


Q4) Thinking now specifically about research funding for health and medical research in Australia. What proportion as a percentage of overall funding do you think should be the responsibility of each of the following people, groups and organisations?

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Support for the Federal Government's budgetary allocations over the past two years totalling in excess of $1 billion to the National Health and Medical Research Council (NHMRC) was very strong with 80% approving and just 4% not approving (Chart 5).

Chart 5: Support for Federal Government NHMRC Funding – Trend

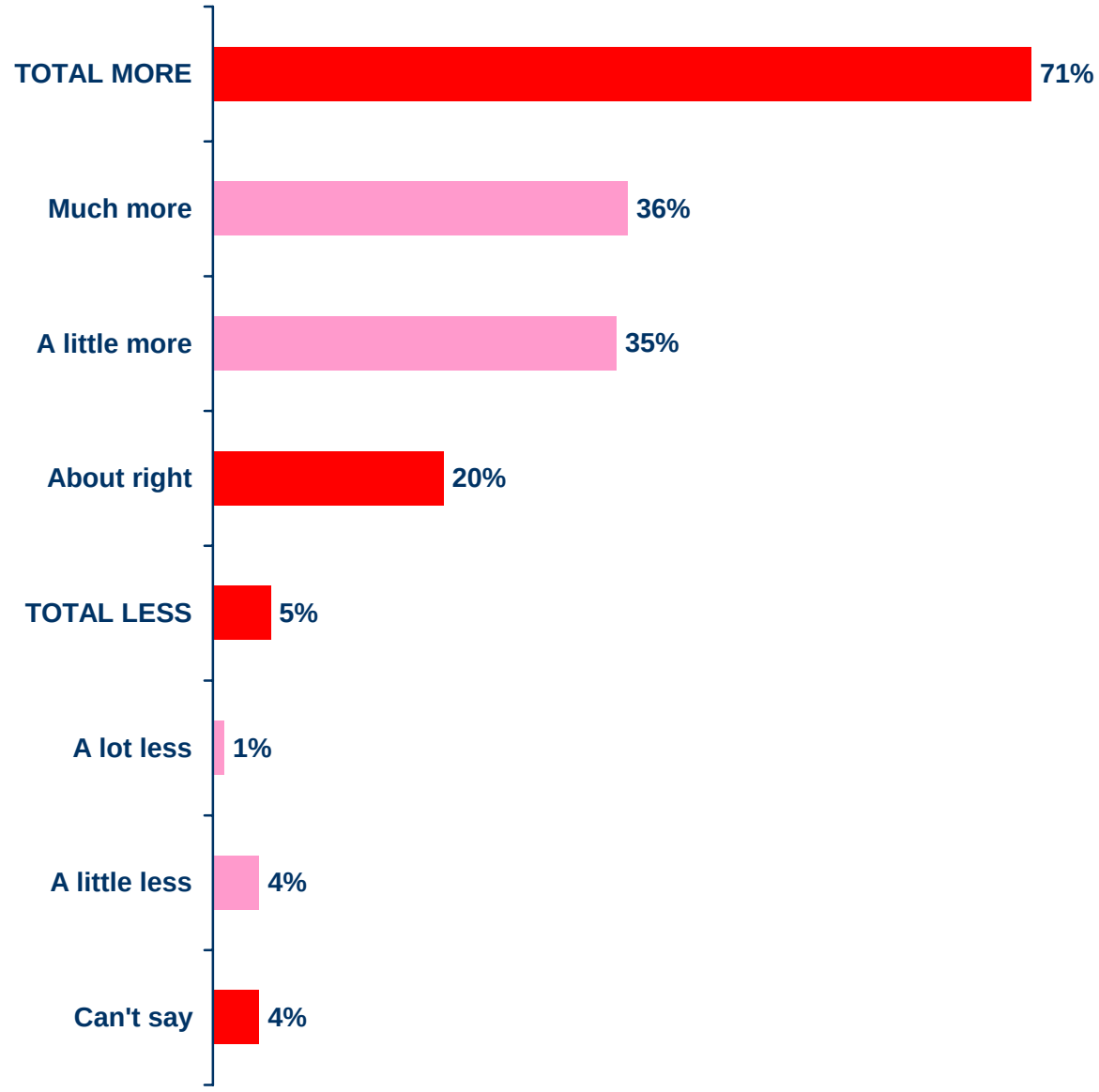


Q5) In the 2006 May Federal Budget, the Treasurer Peter Costello announced an increase in Federal Government funding for the National Health and Medical Research Council (NHMRC) – the national funding body for health and medical research in Australia – from $430 million in 2006 to $718 million by 2009-2010. In the 2007 May Federal Budget the Government announced an additional $435.8 million in grants to medical research facilities to be administered by the Department of Health and Ageing. Plus an additional $5.6 million over four years was awarded to the NHMRC to develop a streamlined approach to eliminate the need for multiple ethics approvals of health and medical research conducted at multiple sites. Do you strongly approve, somewhat approve, neither approve nor disapprove, somewhat disapprove, or strongly disapprove of the Federal Government's NHMRC funding for health and medical research?

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Notwithstanding their support for past budgetary allocations, 71% of Australians would still like to see more funding for health and medical research (Chart 6).

Chart 6: Future Preference for Federal Government Funding



Q6) In 2006/7 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?

Australians believe benefits to people's health and economic payback from new discoveries, more preventative health care, the Australia's international standing and the advantages gained from 'smarter' industries like health and medical research are the main reasons to increase investment in health and medical research (Chart 7).

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Chart 7: Statements for Research Funding Increases (% Agree) – Trend



Q10) 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. Please rate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree with each as an argument or reason for a significant increase in the level of research funding for health and medical research in Australia.

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Qualitatively, Australians can find many reasons to justify their support for increased funding of health and medical research.

"We should be researching more into developing those drugs – if I can call them drugs, and/or devices – that will lead us into a healthier future."

"… the more we've got to spend on looking after people the worse the economy's going to be, so [health and medical research has] got to be a priority."

"Coming up with ideas we can sell."

"[Health and medical research is] vital because of the ageing population of the country as well – and with the – also there's more diseases worldwide that are getting spread and harder to control, so research is vital"

"Just spend more money on research basically."

"Poor health…is a terrible drag on the economy."

"In a general sense, the health and welfare of the whole population…healthy and active...through a longer life…that helps all centres of the economy."

"Australia has an ageing population so more health and medical research is required to keep older Australians well and in the workforce for longer."

"It seems to be the new technology that is going to actually help treat diseases that have never been able to be treated before – you know – I'm thinking of spinal cord injuries and things like that."

"I think we've got a good standing internationally now and we'll be less able to tackle Australian health issues [if we don't increase funding]."

"Our international competitors will not be dismayed if Australia sort of sinks – somewhat – they'll see it as an opportunity for themselves."

"I think it keeps us on the world stage. I think there are other significant things that we will never be on the world stage - population, we're just never going to be the biggest country. Military-wise, we participate in things but we're never really going to be the leader in any of that sort of stuff and there's lots of things that are happening in the world that we don't really rate a mention, but from my travel experience, we do in (health and medical research]. You do read articles in the papers in other countries about amazing things that are happening in Australian hospitals and in medical development and research – so I think that's keeping us on the stage."

"Well the hearing aid – the one for the Cochlear – it was worldwide – that was renowned isn't it – you know and that's a feather in the cap of an Aussie."

"Our successes that we've had so far – are tremendous, why shouldn't we continue?"

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Prevention and early diagnosis first on the list for improving health outcomes

Nearly nine out of 10 Australians believe that when it comes to improving overall health outcomes in Australia or for containing the overall growth of Australia's health care costs, more research to prevent and cure disease and illness (88%), earlier diagnosis through diagnostic tests and imaging technologies and Medicare-funded health care checks with GPs is the best way forward (Chart 8).

> *"An ounce of prevention is worth a pound in cure."*
>
> *"Preventative will stop so much drain on the health system – as far as medications and things like that."*
>
> *"If they can prevent the disease in the first place, you're not going to have the expense of the care and the cure."*
>
> *"I reckon there's a lot more that can be done in the area of preventative health care and if you prevent something you haven't got the cost of treating it."*
>
> *"If you can catch stuff early, then you can effect a cure early and you're not such a burden on the whole system."*

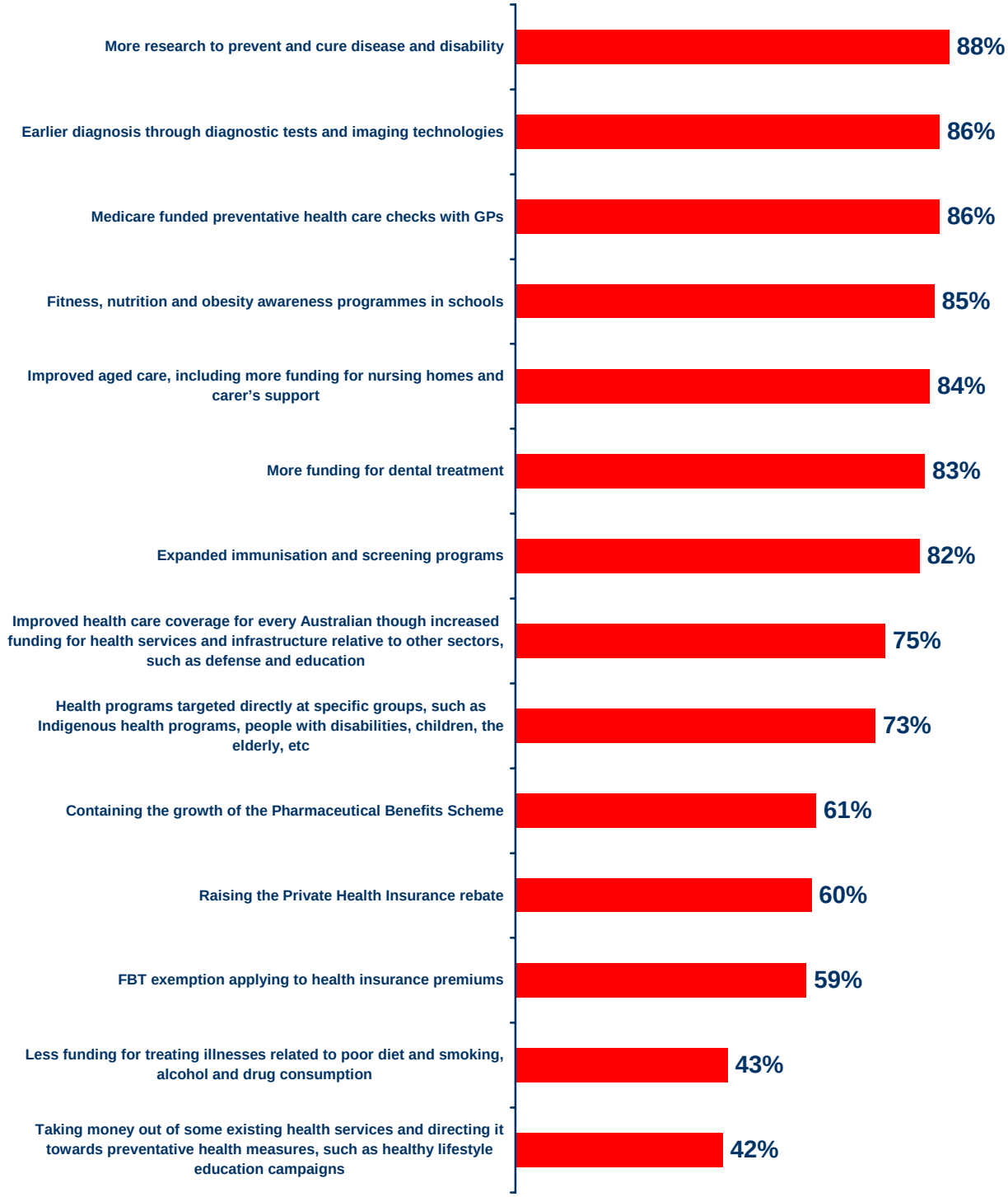
In terms of the kinds of health and medical problems, issues or diseases that should receive a significant increase in funding, Australians see cancer as the number one focus and it accounts for more mentions than all other diseases and illnesses combined (Chart 9). Further, cancer is rate as the number one health and medical issue of importance to Australians and their families (Chart 10).

> *"Cancer because it's just so common, rife."*
>
> *"Cancer, because everyone has been touched."*
>
> *"Cancer is a very widespread disease."*
>
> *"And it's also widespread over age groups…young to old."*

Given this strong response to cancer, it is unsurprising that "new treatments to fight cancer" is the most supported possible development resulting from health and medical research and the one that most Australians (93%) say they would agree to spending taxpayers' money on, ahead of other innovations such as 'using medical bionics to repair paralysing spinal cord injuries' (86%), and 'taking a vaccine to prevent diabetes' (85%) (Chart 11). 'Using stem cells to treat diseases' still generated considerable support with more than three out of four Australians (78%) agreeing to the use of taxpayer funds to fund such research. 'Taking a vaccine to prevent obesity' has far less support at 57% agreement to being funded by taxpayers (noting that this still represents majority agreement).

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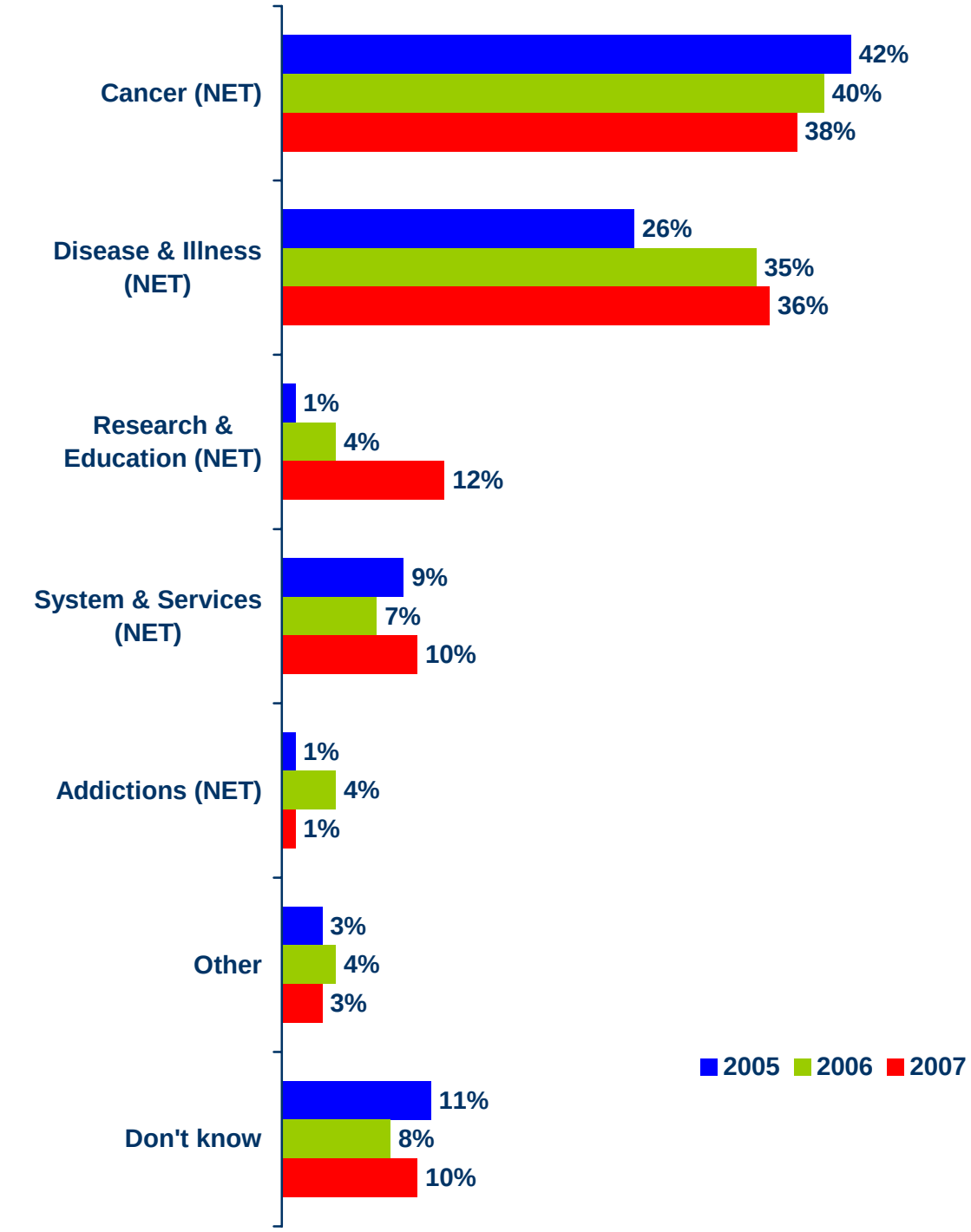
Chart 8: Statements for Improving Overall Health Outcomes (% Agree)



Q11) Following are a number of suggested initiatives for improving overall health outcomes in Australia or for containing the overall growth of Australia's health care costs. Please rate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree with each suggested initiative for improving overall health outcomes in Australia or for containing the overall growth of health care costs.

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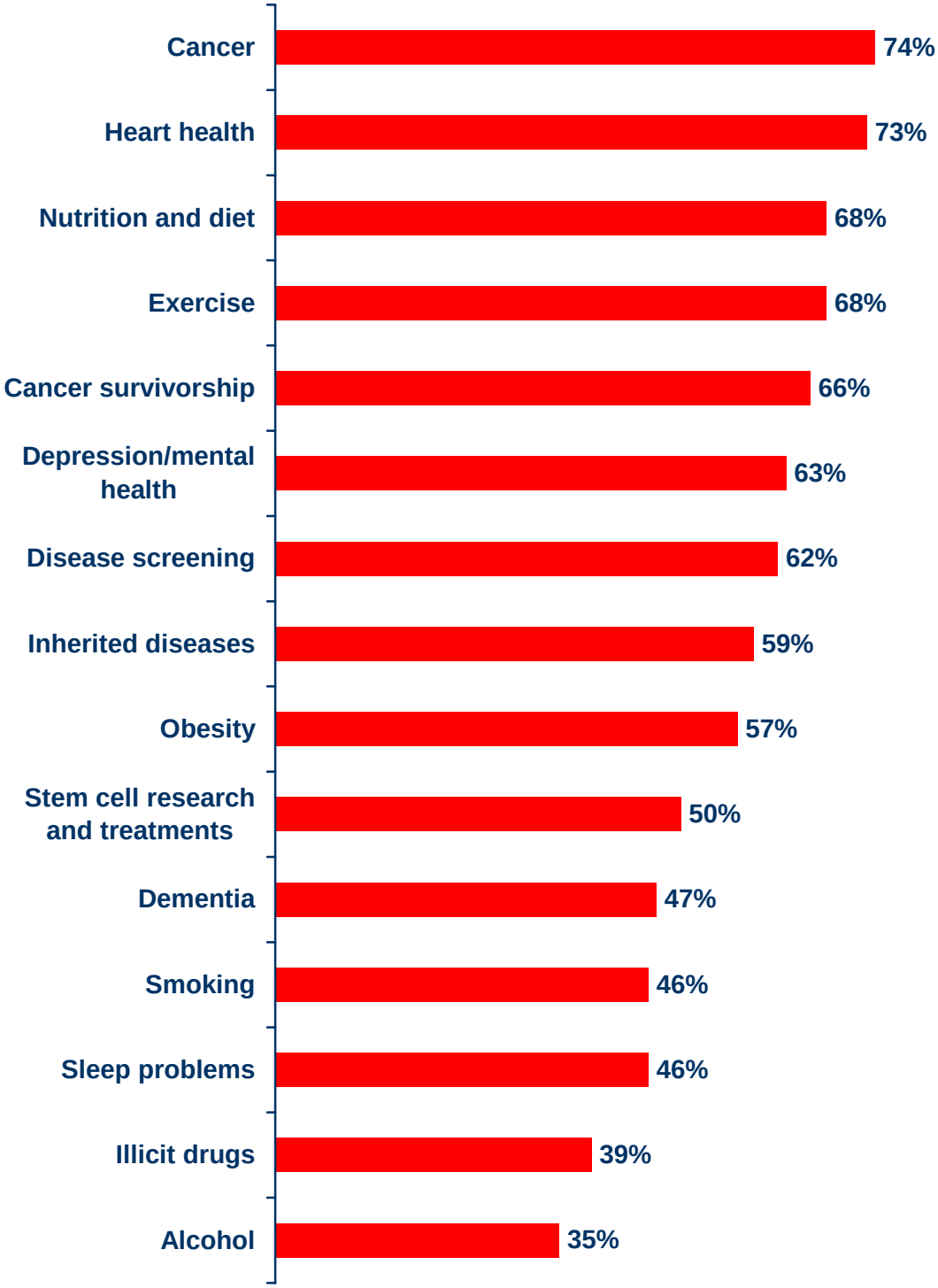
Chart 9: Most Important Health/Medical Problems for Funding (1st Nominated NETS) – Trend



Q7) 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? Please be as specific as you can, using a minimum of 3-5 words to describe the issue or disease.

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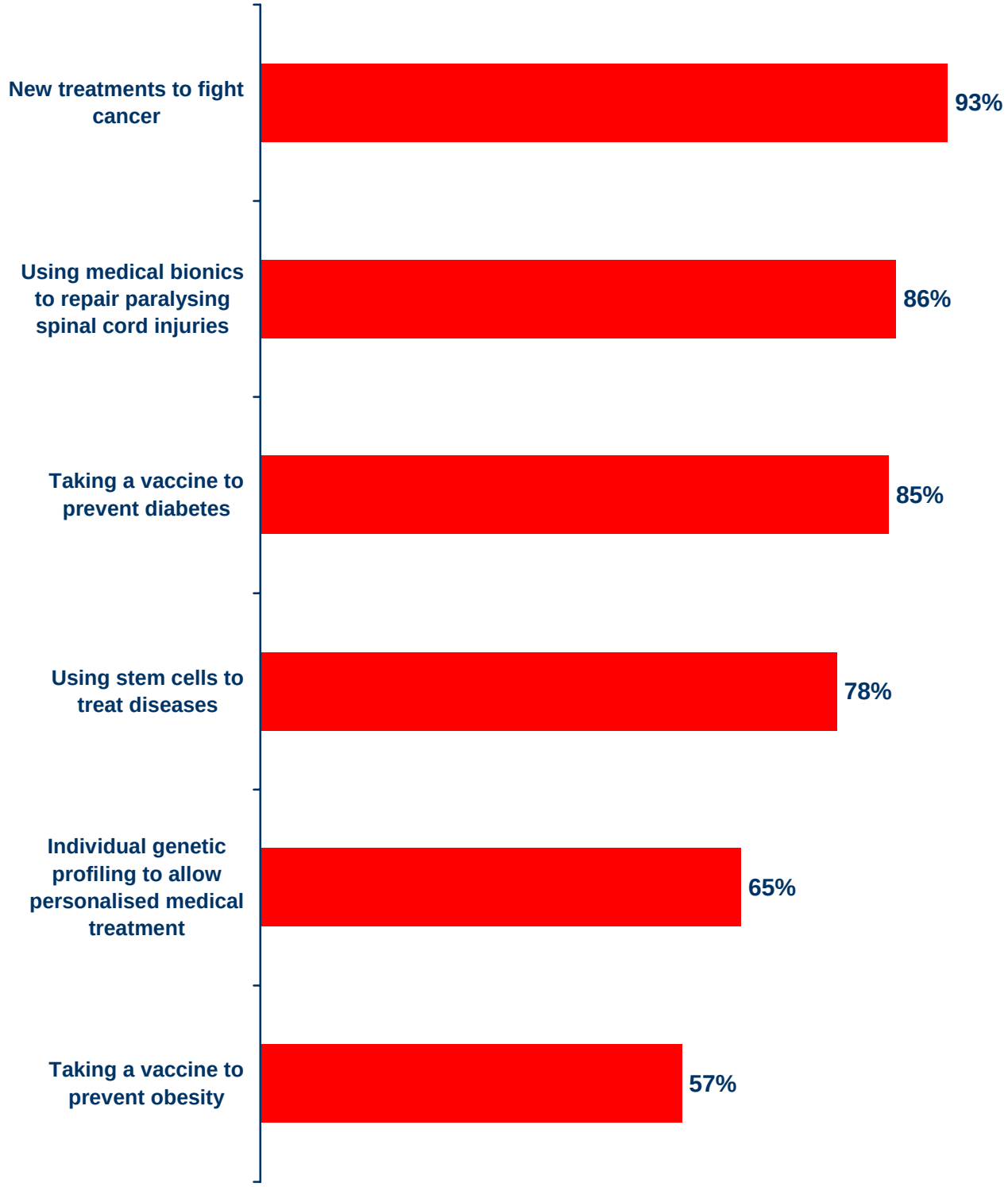
Chart 10: Importance of Health & Medical Issues (% Extremely/Very Important)



Q9) Please rate the importance of each of the following health and medical issues for you and your family.

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Chart 11: Statements for Possible Developments from Research (% Agree)



Q12) Following is a list of possible developments as a result of health and medical research. Given taxpayer money might be used to fund these developments, please rate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree with these possible developments as a result of health and medical research.

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Tackling obesity seen as related to less 'junk' food and being more active

Rather than taking a vaccine to prevent obesity, Australians believe addressing the issue is more about people eating less 'junk' food, exercising more and having more active lifestyles (Chart 12). Most Australians (80%) agree that diet and exercise is the right attack where childhood and/or adult obesity is concerned.

But there is a growing recognition of the pressures of modern life and that perhaps Australians are not sufficiently well-equipped to deal with the threat of obesity, with 78% agreeing that 'people should be given more education and training on preparing healthy, nutritious food for themselves and their children' and 76% agreeing that 'the general public needs ready access to a single, reliable, accurate and authoritative source of information on diet, exercise and how to live healthily so as to help overcome confusion caused by competing health claims used by advertisers'.

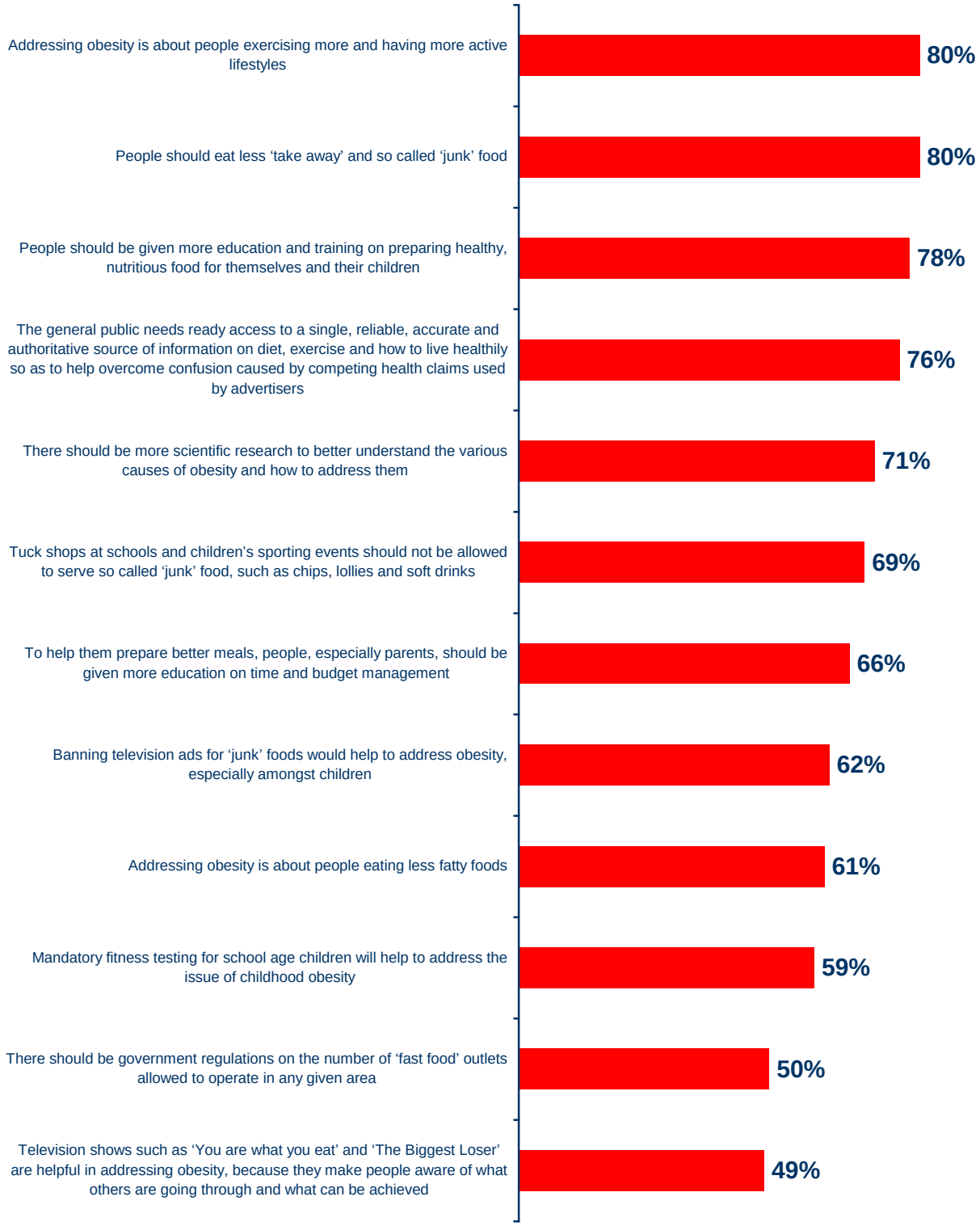
> *"I would rule out taking a vaccine to prevent obesity. I think 'Stop eating!."*
>
> *"Self-inflicted."*
>
> *"A lot of it is changing habits and you can only look at what I did as a kid to what kids do now, I mean I used to go trapping birds…and chasing snakes, kids now sit in front of computer or the TV."*
>
> *"It comes back to self control too doesn't it – you've got to take responsibility yourself, surely, and if it's your kids you're talking about – you've got to take responsibility for that – you can't blame anybody else."*
>
> *"These fat little kids, they're going to cost the system a fortune."*

The relatively strong support for a 'single, reliable, accurate and authoritative source of information' on diet and exercise is perhaps a response to the deluge of information available and accessible on the internet. The 'net once again tops the list of resources in terms of its usefulness in finding out information on health and medical research with 91% of Australians citing it as useful (Chart 13). However, the local GP again runs a close second with 87% mentioning them, and they are qualitatively preferred where specific, personal information is sought, rather than the less trustworthy although significant array of data to be found on the internet.

> *"When you have a lot of information thrown at you [on the internet] it's very hard to know what is the right thing to do."*
>
> *"You've got to trust…in your doctor for that."*

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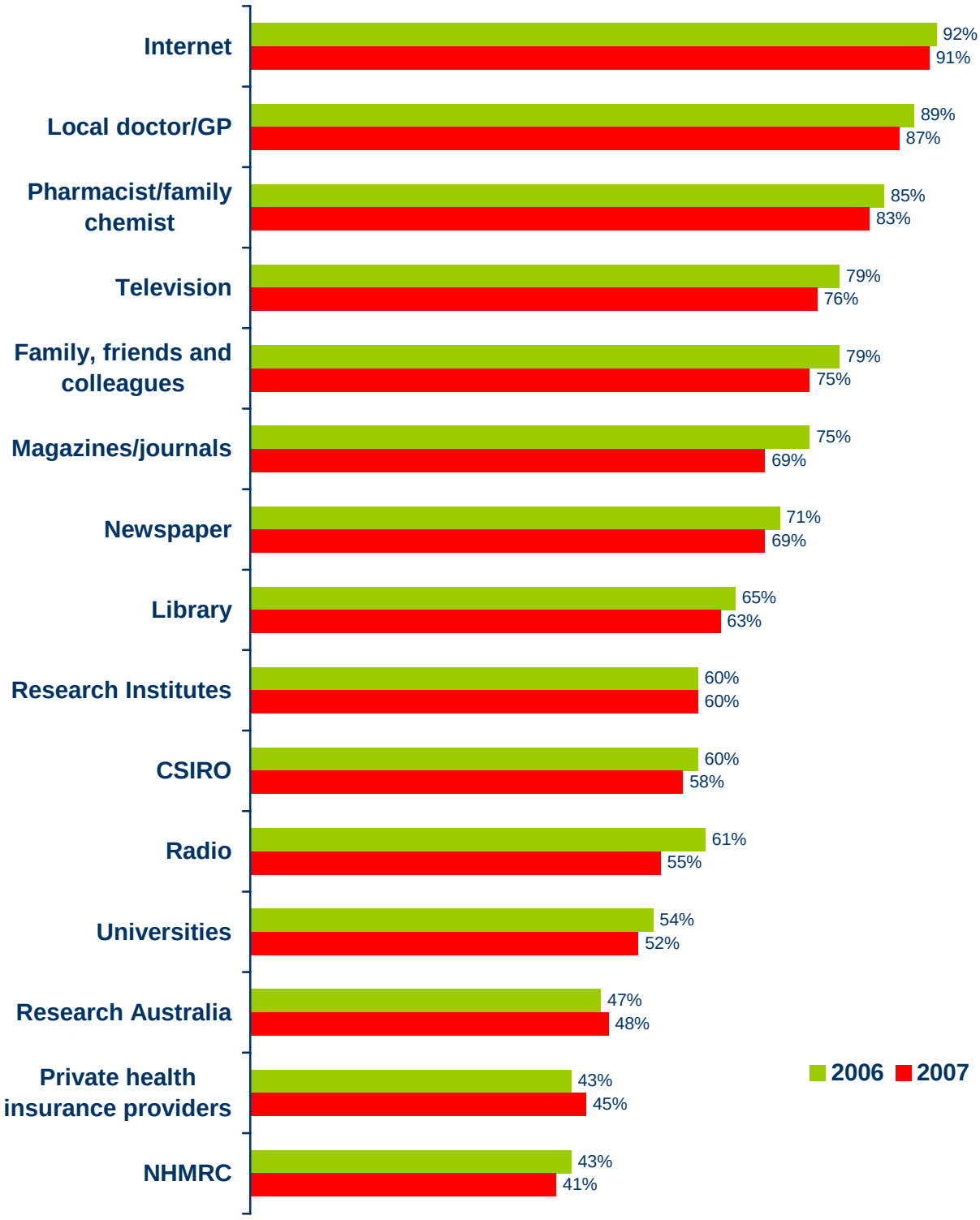
Chart 12: Statements for Actions & Initiatives in Relation to Obesity (% Agree)



Q13) Following is a list of statements, actions and initiatives in relation to childhood and/or adult obesity. Please rate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each statement, action or initiative.

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Chart 13: Usefulness of Information Sources (% Useful) – Trend



Q8) Thinking now about health and medical research, of the following list of information sources, how useful have you found each as an information source about health and medical research?

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Australians divided on the impact of climate change on their health

Australians are on the whole convinced about the existence of climate change with more than half (52%) agreeing that global warming is 'definitely real' and an additional 31% saying it is 'probably real' – a total of 83% (Chart 14). Just 2% say it is definitely not real and 9% say it is probably not real. They are, however, less convinced that environmental problems such as those that might be caused by global warming have actually affected their health in any real sense. Less than half (45%) say environmental problems have either definitely (16%) or probably (29%) affected their health and almost the same proportion (44%) say it has *not* affected their health, either definitely not (13%) or probably not (31%) (Chart 15).

Water shortage does not lead to acceptance of treated water for drinking

The majority of Australians are clearly not keen on the idea of using recycled water (including grey water and treated sewerage) for drinking with only 10% saying they would agree to using recycled water for drinking and another 26% saying they would use either recycled and/or desalinated water for drinking (Chart 16). One in four (25%) will drink *neither* recycled nor desalinated water and 32% would drink *only* desalinated water – a total of 57% who would not drink recycled water. An additional 6% were unable to say.

Qualitatively, those in favour of drinking recycled water point to overseas examples.

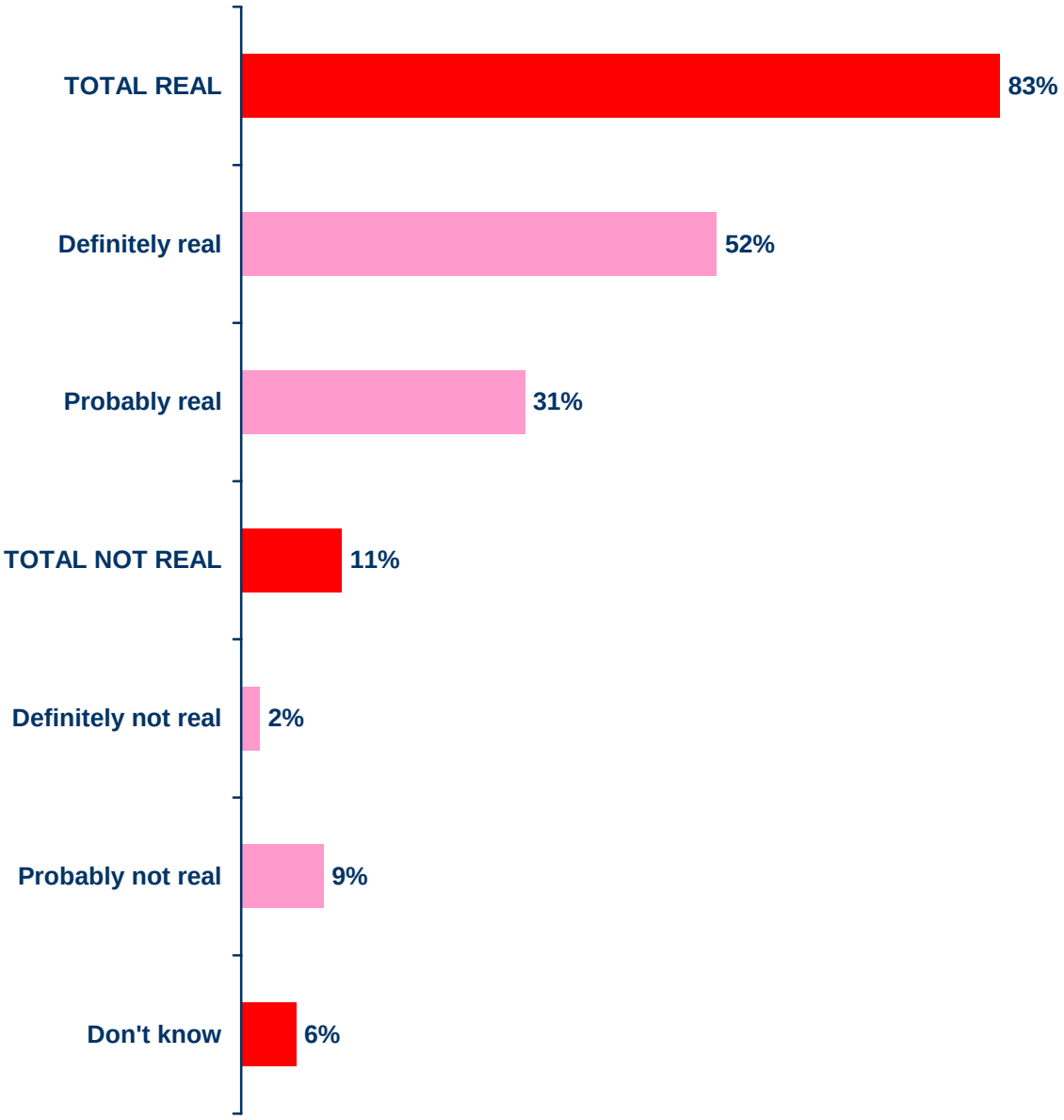
> *"We've all drunk it if we've been overseas – London, Paris, Washington – it's all recycled."*
>
> *"I have drunk it. I drank a bottle of water from Singapore."*

While Australians recognise the impact of drought, they do not see the nation as being at the end of the line in terms of having to move to recycled or even desalinated water, although desalinated is somewhat less unpopular.

> *"[Desalination is] the best source of water to treat for human consumption – at the moment –there's no other big pond of water."*
>
> *"Recycled water can be used for so many other things, we shouldn't have to drink it."*
>
> *"Knowing that this was sewerage."*
>
> *"We've got enough time…to do some alternatives whether it's to build more dams, desalination or just pray a lot more. We've got no need to go to that extent."*
>
> *"There are a lot of other alternatives they should explore."*
>
> *"Why can't recycled water go towards agriculture and we get the good stuff?"*

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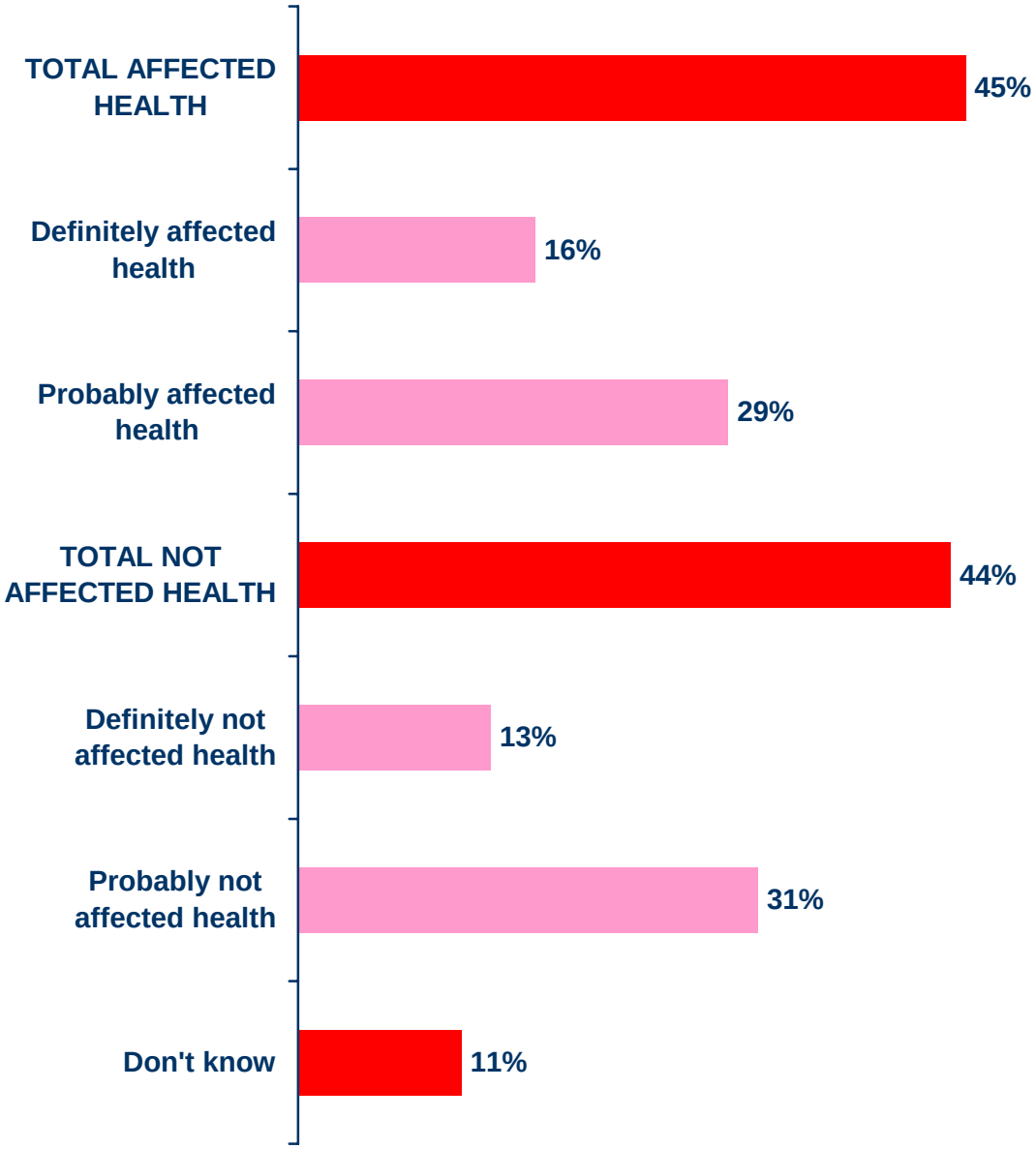
Chart 14: Global Warming Beliefs



Q14) As you may or may not know, some people believe that the earth's atmosphere is gradually getting warmer as a result of greenhouse gas emissions and that, in the long run, this global warming could have catastrophic consequences. From what you have heard or read, do you believe that global warming is definitely real, probably real, probably not real, or definitely not real?

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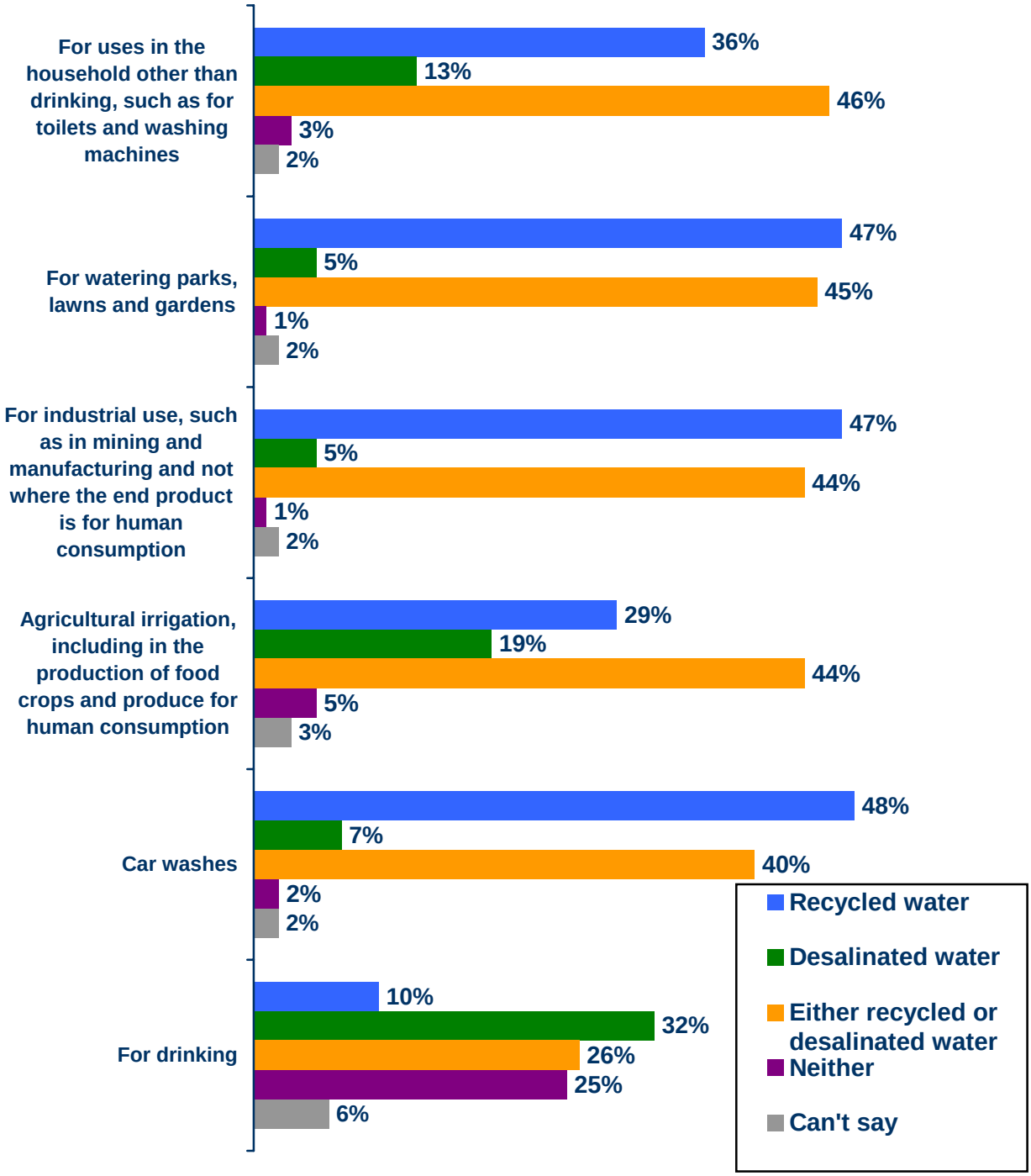
Chart 15: Environmental Problems Affecting Own Health



Q16) Do you think that current environmental problems, such as those that might be caused by global warming, have actually affected your own health in any real sense, or do you think that your health is not affected by current environmental problems?

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Chart 16: Use of Desalinated & Recycled Water – Summary



Q17) Some people say that Australia's water supplies may be significantly impacted due to temperature fluctuations and drought. They say that due to factors such as global warming, population growth and changes in traditional rainfall patterns, the problem might become so severe that we cannot provide for our drinking and other water needs from traditional ground water catchment into reservoirs and from natural river flows. Given this, it might therefore be necessary to use desalinated or recycled water for drinking and other uses. Taking these considerations into account, please nominate whether you agree with using recycled and/ or desalinated water, or neither recycled nor desalinated water, for each of the following. Please assume the recycled water would be from a variety of sources, including storm water and household grey water and sewerage.

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Confidence in traditional health and medical treatments high, alternatives less so

Australians display a very high level of confidence in the prescription medicines prescribed for them by a doctor. A total of 94% are confident in those medicines – 68% very confident and 26% fairly confident (Chart 17). They are also taken by more Australians (69%) for specific ailments than any other therapies (Chart 18).

> *"You wouldn't take them if you weren't confident."*
>
> *"Well you see the results, you can see before and after. I take a cholesterol drug and it's proven – it keeps my cholesterol below 5 – whereas without it my cholesterol was 9."*

Allied health therapies are also well-regarded with 83% of Australians either very (45%) or fairly (38%) confident about them.

> *"I see a chiropractor monthly as a preventative."*

Alternative medicines and therapies enjoy considerably less support with only a little more than half being either very or fairly confident in them.

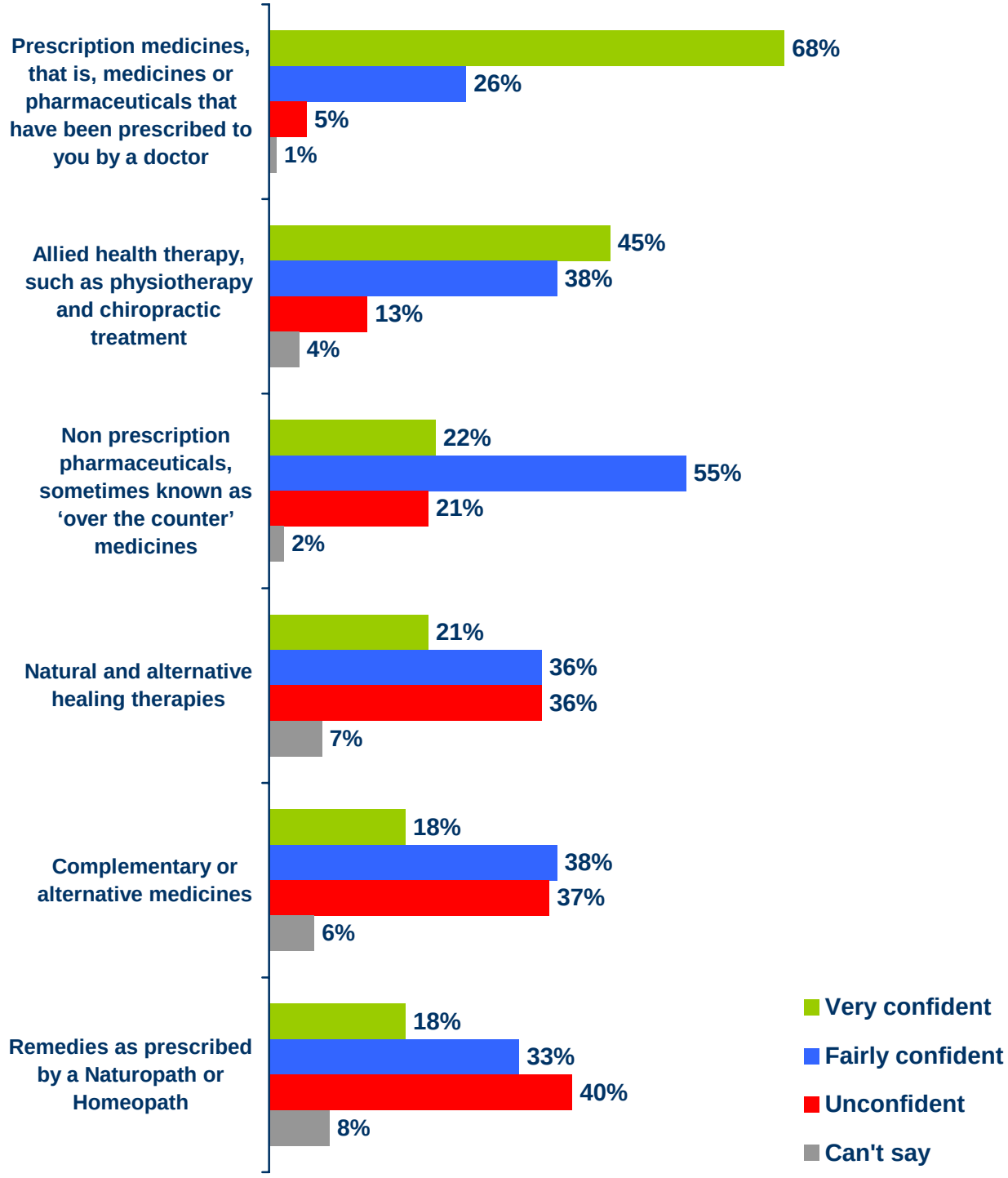
> *"You think pins in the back and stuff like that and suction cuppy thingys and I don't know…"*
>
> *"I believe they're not that effective."*
>
> *"It depends on what you're talking about. If you're talking about a drug – then nah – if you're talking about acupuncture or osteopathy or anything like that then yeah."*

Vitamins were the most commonly taken supplement followed by glucosamine, St John's Wort and fish oil (Chart 19). Less than half are convinced that supplements such as vitamins and alternative medicines actually work (Chart 20) but more than half say they would be more likely to use them if they had more information and evidence (Chart 21). In terms of support for alternative therapies, qualitatively personal experience with a particular medicine or therapy goes a long way to garnering support for them. Almost everyone, it seems, can relate an alternative therapies story.

> *"I take calcium supplements. I think it's important at this age."*
>
> *"My wife takes fish oil and she takes glucosamine."*
>
> *"It's the only thing that got rid of my sister's acne. She tried drugs and it didn't work and a Chinese doctor gave her some stuff that she puts on her face and tea that she drinks once a day…I swear to you her skin looks so much better, it's ridiculous and it wasn't a puberty thing because she's 24. I can't debate that."*
>
> *"I got told by a western doctor to go to a naturopath because when I was like a kid I had problem with warts on my hands. He gave me this stuff…had it for 6 months and I've never had one again in my life for about 15 years."*
>
> *"My mother-in-law's eye was closed over and now it's nearly open because of therapy which no western doctor could fix."*

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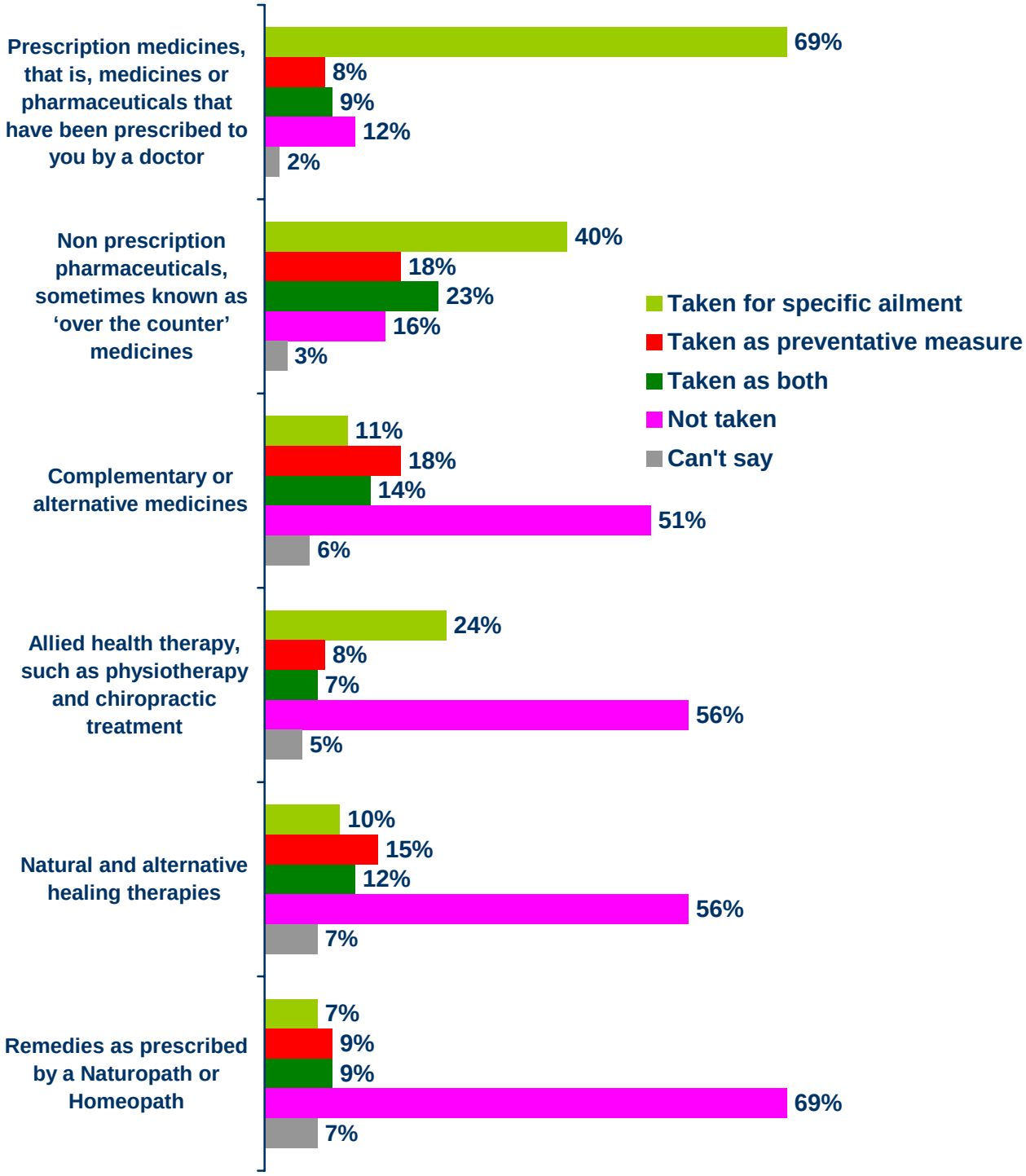
Chart 17: Confidence in Health & Medical Treatments – Summary



Q18) Thinking now about health and medical treatments. How much confidence do you have in each of the following health and medical treatments – absolute confidence, a lot of confidence, a fair amount of confidence, not much confidence or no confidence at all?

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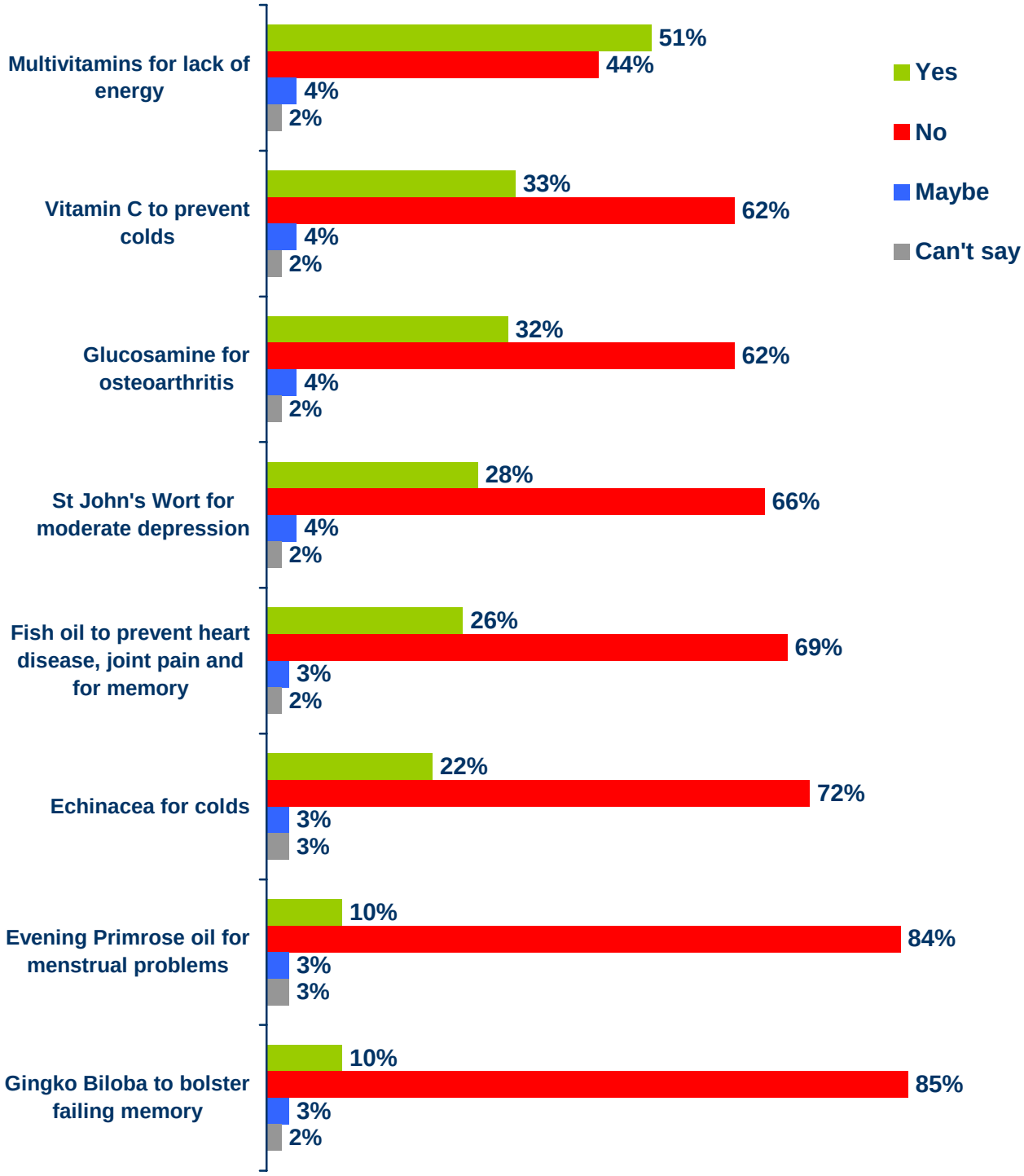
Chart 18: Use of Health & Medical Treatments – Summary



Q19) And which of these health and medical treatments have you taken or used in the last 12 months, either to treat a specific ailment, or as a preventative for general wellbeing?

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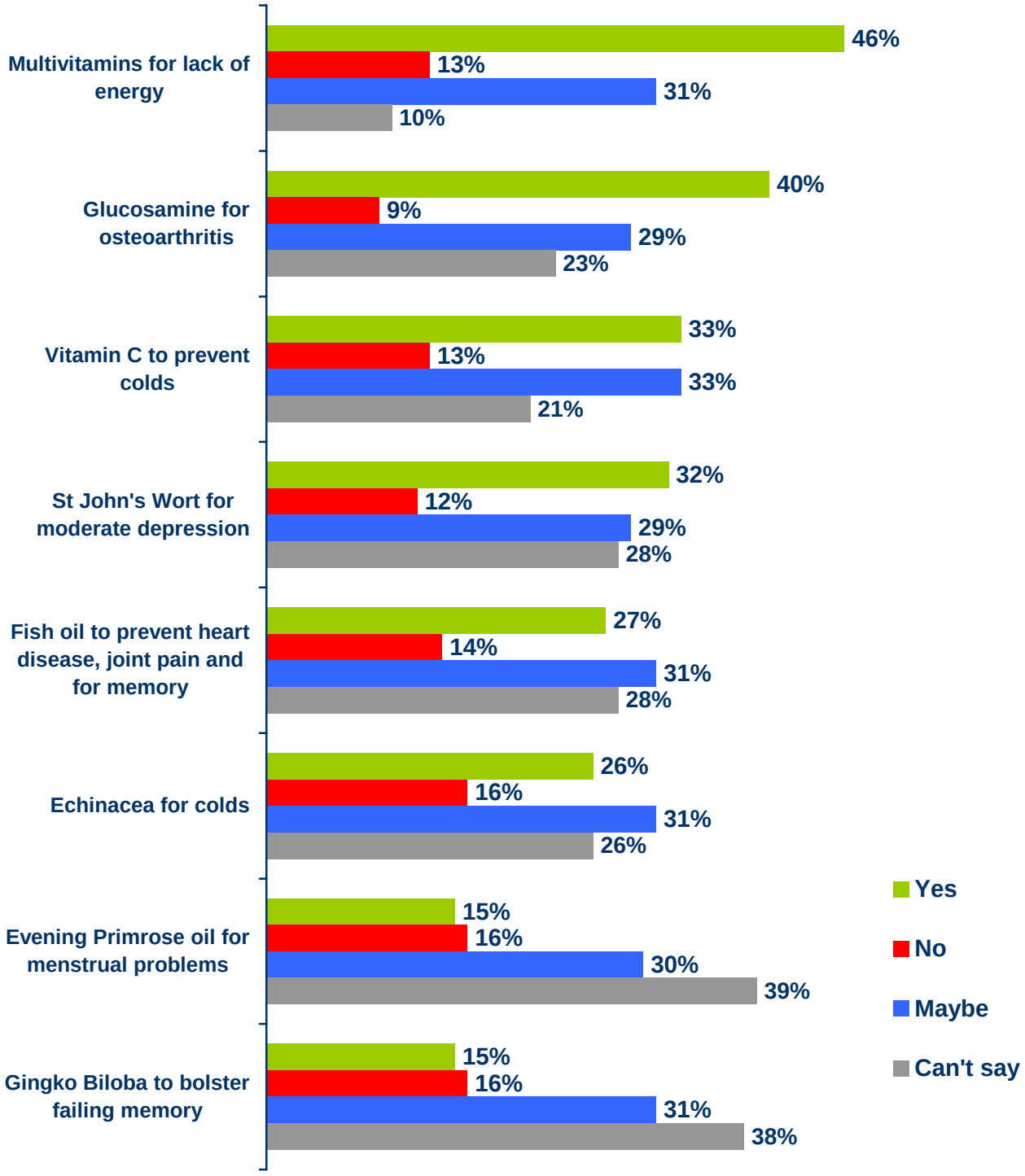
Chart 19: Use of Natural Remedies – Summary



Q20) Have you used any of the following within the last 12 months?

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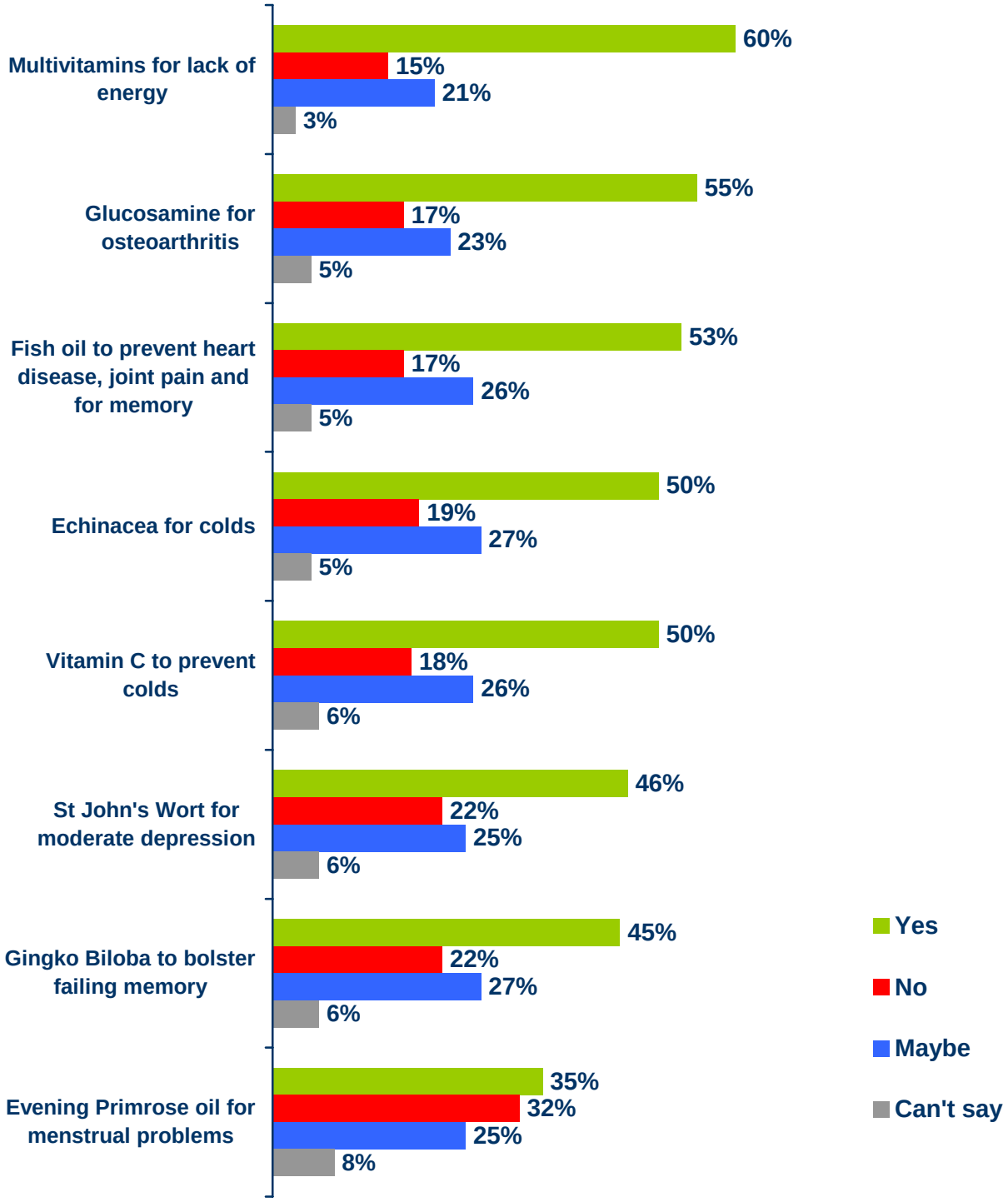
Chart 20: Whether Natural Remedies Work or Not – Summary



Q20a) For each of the following please indicate if you think they work?

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Chart 21: More Likely to Use if Had More Information – Summary



Q20b) Would you be more likely to use one of the following if you had more information and evidence about whether they work?

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Room for improvement on personal eating habits and exercise

Less than one in three Australians (30%) describe their eating habits in terms of being balanced and healthy as 'extremely good' (6%) or 'very good' (24%) (Chart 22). More than half (54%) describe their eating habits as only 'fairly good'. Just 16% admit to having eating habits that are 'poor'.

> *"As we're getting older…I try not to put on weight, I haven't drunk as much."*
>
> *"Making specific choices of food more appealing for children."*

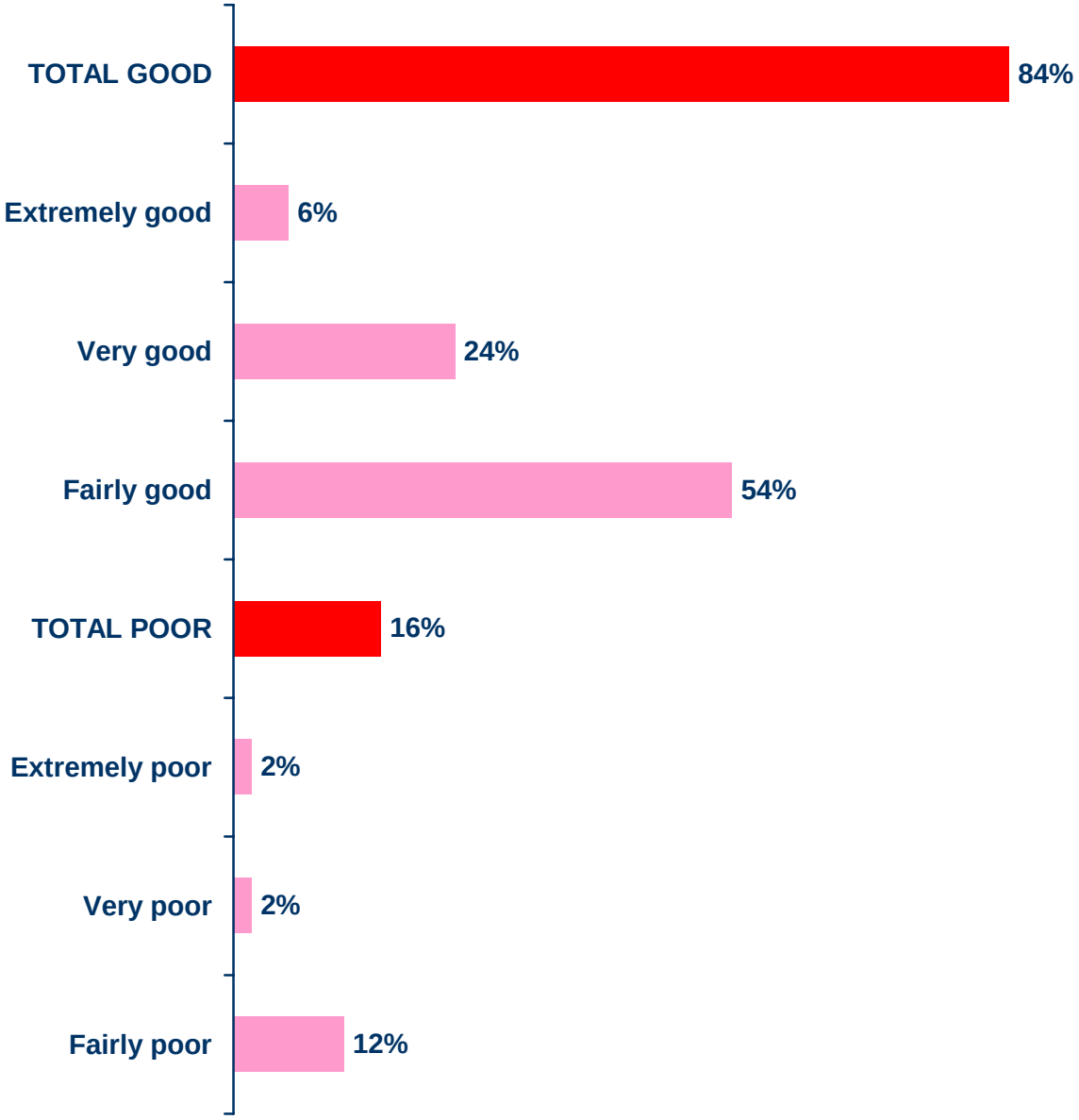
More than one in five Australians (22%) exercise (for at least 20 minutes at a time) once a month or less (9% say they never exercise) (Chart 23). At the other end of the exercise spectrum, more than one in four Australians (26%) are exercising at least four times a week and about another quarter (28%) say they are exercising two to three times a week. Another one in five (20%) exercise just once a week.

Qualitatively, the lack of exercise in particular is recognised with changes in lifestyles over the past 20-30 years and the rising popularity of television and computers seen as largely to blame.

> *"Sedentary lifestyle."*
>
> *"Too much in, not enough out."*
>
> *"I've lost a kilo a week for the last 3 weeks just by taking my dog for two extra walks a week. I reckon that's what it is. I'm still doing everything else the same, eating, drinking…"*
>
> *"It's a different society…we all sit there and watch TV."*
>
> *"I remember as a young child growing up with the neighbourhood kids where we'd be out literally every day after school you play football, soccer, cricket, whatever. You rode your bike, this, that and the other. I see my own kids now and we've actually got to devise plans... to get them to do a sport…otherwise they'd be sitting there watching the idiot box."*

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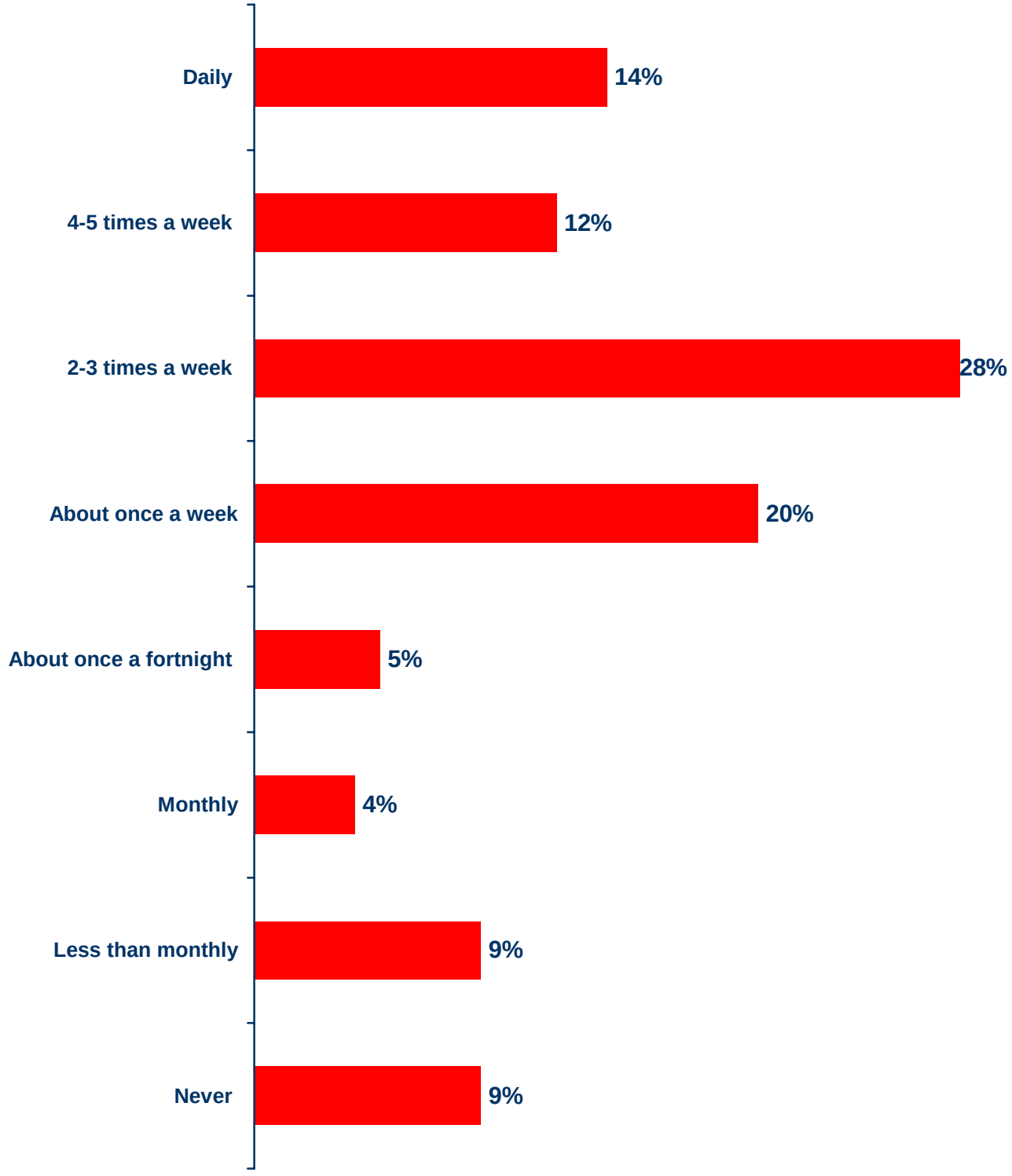
Chart 22: Opinions of Own Eating Habits



Q21) Thinking about how balanced and healthy your eating habits are, and being completely honest with yourself, would you say your eating habits are…?

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Chart 23: Number of Times per Week do 20 Minutes or More Exercise



Q22 And once again being completely honest with yourself, approximately how often do you do some form of strenuous physical activity or exercise, either for work or leisure, that lasts for 20 minutes or more?

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