



report one

Healthy Australia

Seeking better options

About UltraFeedback — the Researcher

UltraFeedback is an Australian market research group with offices in Melbourne, Sydney and Shanghai.

Our research focuses on delivering improved healthcare experiences through a range of proprietary research products and research commissions including GPFeedback, Victorian Patient Satisfaction Monitor and more recently NURSE-ON-CALL.

In August 2007, UltraFeedback commenced a major national project to examine attitudes towards health and healthcare experiences. *Healthy Australia* represents a major component of this ongoing research.

For further information see www.ultrafeedback.com

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Summary reports and data sheets are available at www.healthyaustralia.com.au

Healthy Australia — Feedback and Direction

We'd love to know about your experiences with this report. We'd also like to know what directions you would suggest for future research.

This web address provides access to a feedback tool. If you complete it, you will have access to benchmarked feedback from others and become part of the *Healthy Australia* online community.

www.ultrafeedback.com/survey/612



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A

Introduction

Healthy Australia
Seeking better options

Foreword

Health is increasingly being recognised as a form of wealth. Good health is a state of life to be pursued and cherished.

As more Australians become affluent, the desire for high standards of health and the demand on our health services have reached a level that cannot be sustained by the current approaches.

It is not a matter of just improving what exists or finding innovative approaches. Although improving the quality and focus of our health services can help, a re-orientation to individual and family responsibility is required.

So, what can we do? Yes, we can ban junk food advertising, reduce our reliance on medication, co-ordinate health services around the healthsumer, reward people for physical activity, replace open surgery with natural orifice techniques and initiate other similarly exciting initiatives, but it is a fundamental shift from 'system dependence' to 'individual and family reliance' that is required.

Autonomous motivation and health literacy are the areas to address in improving our health.

This research is the first of a program of exploration into healthsumer management behaviours and insights to provoke improvement in our health.

Healthy Australia: Seeking better options scopes the attitudes, perceptions, experiences and disposition of Australians. With over 9,000 respondents, it is broadly reflective of our general community. It pays particular attention to some innovative healthsumer profiles — **HEALTHimals™** — that are designed to assist in communicating the actions that we could take to improve our health. For example, the 21% of the population who are deemed Apathetic Cynics (low Control, low Vitality, low Literacy) need special attention and highlight opportunities to improve our communications about health improvement strategies.

Broadly, this report shows that there is a wide range of options available, but the choice is bewildering to some and deflating in responsibility to others. But some people thrive in the current environment. Is it the Active Positivist profile that should be the ideal in all health management and promotion activities?

The way forward is not *more*, *better* or *more innovative* but a restoration of individual and family responsibility for health. At the moment, the responsibility for solutions is too far towards an overstretched public system, medical experts and commercial interests.

Healthsumers face more issues in managing their health than ever before. We have an ageing population and a general rise in resource availability which creates an environment in which chronic illnesses and illnesses of abundance flourish. There are choices available that negate or promote health. As more information becomes available, the diversity of advice can be confusing and solutions that are consistent, clear and simple — and placed appropriately — are more likely to be adopted.

A greater individual responsibility for health management, matched with better coordination of health services that maintain a strong healthsumer orientation, should be the focus.

In this report, we have deliberately chosen to avoid the commonly-used word to describe the people who are the focus of such research. ‘Patient’ is a passive word suggesting a mute acceptance of care offered. It is a ‘waiting’ expression that promulgates the imbalance of power between provider and receiver. The word ‘patient’ is probably still appropriate for a person in acute hospital care receiving skilled and urgent support from specialist health professionals. But this report has gained insights into the health-seeking behaviour of people who are ill and not ill; people in their normal lives and not necessarily tied to a hospital bed. They manage their health, seeking information and ‘buying’ solutions. They are *healthsumers*.

The ability to understand and use health information when making decisions about health and medical care is strongly linked with better health outcomes. Low literacy is associated with misunderstanding how to take medications and lower health status. Limited health literacy is associated with higher hospitalisation rates and higher healthcare costs.

Healthy Australia hopes to help healthcare providers navigate the conflict between authoritative understanding and collaborative education by describing the current situation from a healthsumer’s viewpoint and suggesting some ways forward. The healthsumer behaviour profiles are introduced to encourage a wider discussion and some innovative implementation ideas.

One profile stands out as ideal: the Active Positivist exhibits high control, vitality and literacy. A population that has more of these types of healthsumers will be healthier.

The way forward is not *more*, *better* or *more innovative* but a restoration of individual and family responsibility for health.

For example, 79% of our total respondents feel their health is the same or better as twelve months ago. But 91% of Active Positivists feel this way, whereas only 61% of Weary Detectives have this experience. The health profiles are also associated with incidences of illness, most of which are controllable. They are also reflected by their important experience of sleep. The Weary Detective does not sleep well and wakes unrefreshed.

Seniors tend to feel healthier than their younger counterparts. Is there a maturity and acceptance that baby boomers lack as they fight their rapidly approaching mortality? Some findings are obvious — feeling healthy is more common among non-smokers than smokers, but still some people smoke.

Our health system has been designed to treat disease and not the diversity of people. The five-minute consultation reduces a person to a mobile ‘condition’ and cannot possibly grapple with the complexity of an individual with personal dispositions and attitudes to managing their health.

There has been much rhetoric and well meaning effort applied to creating a ‘patient-focused’ healthcare experience, but change in such a deeply entrenched ‘expert-led’ system with its archaic structures and processes has generally failed to date. We have failed to build institutions that respect individuals. As a consequence, it is not surprising that people are instead choosing alternative medicine and over-the-counter (OTC) approaches. Those who use the system rely on it to rescue them from often self-induced conditions with expensive technological solutions.

Is this leap into the unknown or untested appropriate? Is the devolution of advice to nurses placed in the corners of supermarkets a good trend?

Who is best placed to understand how best to treat an illness? While there are obviously many conditions that require an outside expert, individuals and families are often better placed to deliver healthcare advice. They may not have the ‘expert knowledge’ but they are certainly better placed.

So as you review this report, reflect on how best to influence the various segments identified to adopt better health management behaviours.

Let us move forward by recognising how individuals behave differently when seeking healthcare and see if we can build some simple and more immediate community-based strategies that can improve our health.

If we take the existing ‘doctor-centric’, fix-the-problem approach, our costs will continue to grow. If we take a centralist, one-size-fixes-all path, we’ll end up with a fatter, sicker society.

This report allows you to explore a massive body of information. Its main strength is in the online analysis. This Report reviews the findings and provokes discussion.

Healthy Australia: Seeking better options was created by UltraFeedback and is based on strong research evidence. It also contains expert opinion and commentary.

We are delighted to provide this report and contribute to the continuing discussion about how we can move towards a healthy Australia.

A handwritten signature in black ink, appearing to read 'Tom Holman', with a long horizontal flourish extending to the right.

Tom Holman
Managing Director
UltraFeedback

How to Use *Healthy Australia*

Healthy Australia is an innovative research tool that provides dynamic health profiles of over 9,000 Australians. It provides a new framework for understanding Australians' health management attitudes and experiences.

It is intended to serve as a reference for health professionals and provide decision support for the provision of healthcare solutions.

There are two main components: an online database and this report.

The online database is housed in HERMES, a proprietary Australian survey tool that provides a dynamic and responsive means for custom reporting. Among the distinguishing features of the online database is the opportunity for the user to fully analyse the dataset to suit individual needs, through data segmentation, cross tabulation analyses and tracking multiple waves of data. Appendix E2 (page 171) provides a summary of the base data.

Both the online database and this report explore the key themes of consumer health behaviour and healthcare satisfaction.

Report 1: Seeking better options is presented in five parts.

- A. Introduction
- B. Key Findings
- C. HEALTHimals™ Health Consumer Profiles
- D. Analysis and Interpretation
- E. Appendices

B. Key Findings

Section B summarises three key aspects of the research: health consumer behaviour, healthcare satisfaction and priorities to improve.

Health Consumer Behaviour

Health management, information seeking and purchasing behaviour are examined. Consumers acting in this domain are referred to as 'healthsumers'.

Three psychological factors (control, vitality and health literacy) are used to generate a series of eight healthsumer personality profiles. These are referred to as HEALTHimals™, and are used as a basis for comparison throughout the report.

Healthcare satisfaction

Respondents' conditions and experience with medications are highlighted and their experiences and satisfaction with healthcare providers are examined.

Healthsumer experiences and satisfaction are summarised for:

- General practitioners;
- Practice nurses;
- Specialists;
- Complementary therapies;
- Surgery;
- Hospital stays and
- Pharmacy.

Priorities to improve

Specific areas where performance is below consumer expectations are identified as Priorities to Improve. Corresponding metrics are provided to facilitate service delivery improvement.

C. HEALTHimals™ Healthsumer Profiles

Section C describes HEALTHimals™ as a means of understanding and profiling consumers' health management behaviour. Eight individual health profiles are identified in the research.

HEALTHimals™ offer insights for understanding healthsumers, raising awareness of health issues, better targeting of health messages and encouraging desirable health behaviour.

D. ANALYSIS AND INTERPRETATION

Section D provides further discussion and interpretation of key themes of the research. The commentary highlights challenges for improving health management both at an individual and institutional level.

E. APPENDICES

The appendices provide the survey instrument, survey methodology and additional detail from the online database.

***Healthy Australia* Production Team**

Healthy Australia has been produced by the research and production support team at UltraFeedback. Additional contributions have also been made by independent specialist commentators working in association with UltraFeedback. Further information on the team is included in appendix E4 (page 230).

About the *Healthy Australia* project

UltraFeedback is a market research consultancy with many years of experience working within the Australian healthcare segment. Its founders have worked in and for healthcare improvement since the 1980s and have actively worked in researching the healthcare experience since the mid-1990s. The GPFeedback program, which commenced in 2000 and continues today, provides views from GPs, pharmaceutical companies and consumers about their experiences.

Many of UltraFeedback's research programs have sought the views of the 'end customer' to guide the development of services from the various bodies that serve the health community.

Since 2005 UltraFeedback has been the researcher for the Victorian Department of Human Services' study of hospital users' satisfaction, the Victorian Patient Satisfaction Monitor and a similar program for ACTHealth. In 2008, UltraFeedback has commenced a project examining the outcomes of the Victorian Government's NURSE-ON-CALL service. Through these studies, and a range of other research projects, UltraFeedback has become a pre-eminent researcher of experience and attitudes in the field of healthcare.

In 2007, UltraFeedback commenced a study of its own. The purpose was to explore a wide range of experiences of healthcare through a 'patient focus' and prompt a better consideration of the recipients of our healthcare services.

About the sample

UltraFeedback surveyed a total of 9091 Australians in August 2007. Data were received from a huge range of people throughout Australia. The distribution of respondents by age and State of residence appear below, alongside figures from the Australian Bureau of Statistics (ABS). The data below are expressed in terms of percentage of the total sample (Healthy Australia) or general Australian population (ABS).

Age group	Healthy Australia (%)	ABS (%)*
Senior (62 years or older)	12	16
Baby boomer (43 to 61 years)	44	25
Generation X (27 to 42 years)	36	23
Generation Y (18 to 26 years)	8	12

Table 1: Comparison of sample age groups – Healthy Australia to ABS

State/Territory	Healthy Australia (%)	ABS (%)*
ACT	2	2
QLD	23	20
SA	10	8
VIC	24	25
WA	9	10
NSW	27	33
NT	1	1
TAS	3	2

Table 2: Comparison of sample regions – Healthy Australia to ABS

*Source: ABS 2006 Census data (at www.abs.gov.au/websitedbs/d3310114.nsf/home/Census+data, accessed 12 February 2008)

There are no comparisons for education, household income or employment status due to incompatible categorisations between *Healthy Australia* and ABS measures.

The spread of respondents by gender were:

Gender	Per cent
Female	68
Male	32

Table 3: Healthy Australia survey respondents by gender

The Healthy Australia survey sample was drawn from a number of contact sources and the large number of respondents (and the variety amongst respondents) ensures that the sample provides a good cross-sectional picture of Australian health consumers. However, the sampling process was not based on full random sampling techniques and was not subjected to quota-sampling methods to maximise generalisation to the general Australian population – for example, the Healthy Australia sample has a higher proportion of female respondents (68%) than the general Australian population (51%).

HEALTHimal™ behaviour profiles

Three factors contribute to the definition of the healthsumer behaviour profiles:

- control ('try to be healthy', 'it's important');
- vitality ('feel healthy', 'have enough energy'); and
- literacy ('seek health information').

These three psychological factors were used to generate a set of eight healthsumer personality profiles.

Profile	Control	Vitality	Literacy	Per cent
Active Positivist	High	High	High	25
Comfortable Romantic	High	High	Low	10
Anxious Fatalist	High	Low	Low	8
Weary Detective	High	Low	High	12
Apathetic Cynic	Low	Low	Low	21
Passive Worrier	Low	Low	High	7
Carefree Investigator	Low	High	High	5
Happy Unaware	Low	High	Low	10

Table 4: Healthsumer personality profiles

The spread of age groups by profile were:

	Senior (%)	Baby boomer (%)	Generation X (%)	Generation Y (%)
Active Positivist	38	26	22	20
Comfortable Romantic	15	10	8	10
Anxious Fatalist	9	9	8	7
Weary Detective	13	15	11	9
Apathetic Cynic	12	20	25	27
Passive Worrier	5	7	8	7
Carefree Investigator	3	4	6	6
Happy Unaware	7	9	12	13

Table 5: Survey respondents age groups by health profile

The health profiles are described in detail starting on page 39.

Statistical notes

Numeric Expressions

Throughout the report scores are presented for specific survey items. For example, average health satisfaction for Generation Y respondents is 4.43. These scores, based on a five-point scale, represent the mean and are denoted by 'M'. Higher scores indicate greater levels of satisfaction.

Rounding

In tables where percentages are shown without decimal places, totals may not add up to 100 due to rounding.

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