

The self-care opportunity✦



2022

Empowering Australia
towards better health



A report by Consumer
Healthcare Products Australia



Lonergan Research surveyed 2,000 Australians over the age of 18. Surveys were distributed throughout Australia including both capital city and non-capital city areas. The survey was conducted online amongst members of a permission-based panel, between 16 and 27 June 2022.

The research was commissioned by Cube PR and Consumer Healthcare Products Australia, and conducted by Lonergan Research in accordance with the ISO 20252 standard.



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Introduction✱

Never before has it been more important for Australia to foster a health resilient and empowered population. Championing a strong self-care strategy across the community and the healthcare system, and increasing health literacy levels, are vital components to this.

Knowing where to find, interpret and use information and health services to make effective decisions not only helps to prevent illness and improve the health and wellbeing of individuals, but it also ultimately lifts the performance of the entire health system.

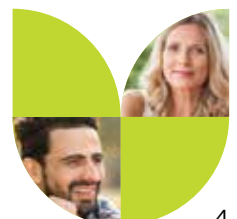
When recognised as part of critical health infrastructure, self-care is essentially a game changer. A nation of individuals practicing self-care consistently and with a good understanding of the tools and information they have available will have a positive impact across the board – **better health outcomes, efficiencies, cost savings and an ability to focus resources on those who need it most.**

To help policymakers, healthcare professionals and health advocates better understand Australians' self-care engagement, capabilities, and behaviours, Consumer Healthcare Products Australia launched a unique research initiative in June 2022.

A cross-section of 2,000 everyday Australians from across the country were asked about the depth of their health knowledge, skills and behaviours, with a particular focus on self-management, health literacy, digital health activity and interaction with health professionals.

The following report summarises the main findings from the insights gathered and reviews the state of play in priority areas together with the opportunities that exist to improve Australians' self-care capabilities.

The findings reinforce the significant interest levels and motivation to do more in health. There are also clear areas for support and education identified that will build greater engagement and empowerment and ultimately improve health outcomes.



Self-care in health✦



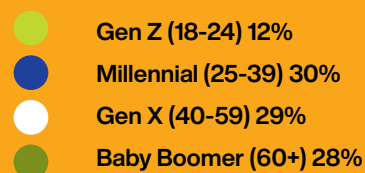
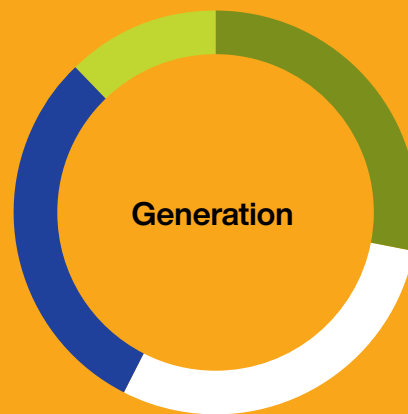
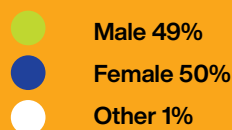
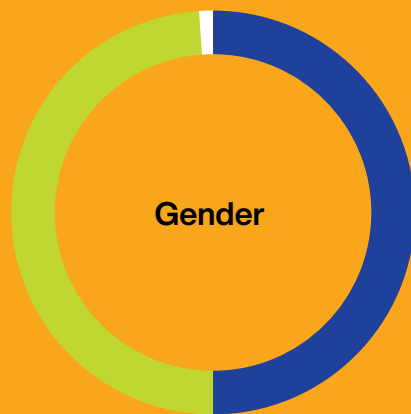
Self-care in health is a complementary, evidence-based approach that empowers and supports individuals to take their health and wellbeing into their own hands. It can also help governments foster a more resilient and empowered health population.

It encompasses the knowledge, skills and activities individuals can utilise every day to enhance their health, support better health decision-making, appropriately self-manage illness and disease, and responsibly use medicines and other healthcare resources.

Healthy literacy is a vital enabler of greater self-care. This includes the ability to find and understand information and services, and also the skills to interpret health information and appropriately apply it to individual circumstances.



Research Methodology✦



Current health condition

Mental health condition/ illness – 18%



Mental disability – 4%



Physical disability – 12%



Long-term health condition (lasting six months or more) – 37%



Short-term health condition (lasting less than six months) – 16%



None of the above – 43%



A 20-question online study was conducted among members of a permission-based panel. The study was conducted among 2,000 Australians aged 18+. Surveys were distributed throughout Australia including both capital city and non-capital city areas in June 2022.



General Overview✦

The research uncovered a series of important insights and opportunities to support and foster greater levels of self-care in Australia. When it comes to health, the community has a very high sense of responsibility, together with a willingness to increase knowledge, understanding and skills. The major insights gathered are as follows:

✦ ***Despite the pandemic backdrop there is a relatively low level of engagement in health.***

Even with a significant proportion of those surveyed (57%) managing a current health condition, one in two Australians (50%) state they have a relatively low to medium engagement in their health.

✦ ***Australians' health literacy levels – a critical component to self-care – are very mixed.***

Just one in five Australians (22%) rate their health literacy as high, while nearly one in three (30%) believe their health literacy is low. The findings clearly reinforce the importance of health literacy with those having the highest levels more likely to have high health engagement (79%). Significantly, around 90% want to see parents (92%) or schools (88%) doing more to improve children's health literacy.

✦ ***There is a very strong sense of responsibility when it comes to health and also an acknowledgement to do more.***

Nearly all Australians agree they're responsible for managing their own health (97%). A significant proportion (85%) also agree they should do more to improve their health and the same proportion (84%) want to improve their skills and knowledge so they can be more engaged in the management of their health.

✦ ***Not everyone feels equipped to self-manage common health problems.***

More than a quarter of Australians (27%) believe they don't have the information they need to sufficiently manage their health. This is driven by the younger generations – with Gen Z and Millennials feeling they lack information, while Baby Boomers and Gen X are more likely to feel they have the information or skills needed to self-manage common health conditions.

✦ ***While pharmacists are viewed as professional and trusted experts, they are not always a first port of call with common health conditions.***

Despite 82% of Australians agreeing they'd seek pharmacist advice for common short-term health conditions the findings show they head online (50%) or organise a GP consult (76%) ahead of seeking a pharmacist's advice.

✦ ***Not surprisingly, use of online and digital technologies with health is high – and it's not just about comprehension; Australians want to be sure they can believe it.***

Four in five (81%) use health websites or apps to research or find information on their common health conditions and two-thirds (66%) view them before seeking advice from a GP or pharmacist. For those who read information before seeking advice, around one in ten (9%) state they fully understand what they're reading online and half (52%) of Australians agree they have difficulty identifying credible sources of digital health information.

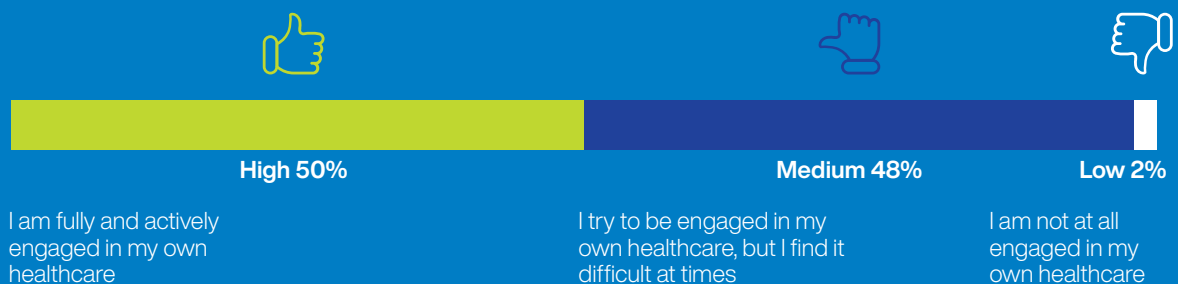


**27% of
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Summary of Findings✦

Who's most engaged in their health?



Being engaged in our health is essential for self-care and improving health outcomes.

The findings show those more likely to be engaged in their health are generally older and/or already managing a long-term health condition.

Young people tend to be less engaged and less equipped to manage their health.

There is a clear opportunity across the board to work to empower consumers in their health.

Despite the challenges of the pandemic and increased focus on prevention and health, the findings uncovered that only one in two (50%) Australians are highly engaged in their health management.

The results overwhelmingly confirm the most engaged, and health literate, are people who have enjoyed more laps around the sun, while more youthful Australians admit to being less involved.

Baby Boomers are the most engaged (66%), alongside those with long-term health conditions (56%).

The results also showed **women are more likely to have higher engagement with their health (55%) than men (46%).**

Youth brings lower engagement, shown by Gen Z (29%), but this increases significantly with Millennials at 43% and Gen X at 51%.

The findings also reinforce how an understanding and appreciation of health is linked to greater empowerment with **those having the highest health literacy more likely to have the highest health engagement (79%).**



Identifying information gaps✱

The findings show most Australians want to be better equipped to manage their own health – but less than 2 in 5 (37%) have high confidence they have the skills and knowledge to engage in actions to prevent illness, presenting a receptive and motivated audience for education.

Despite nearly all Australians agreeing **they're responsible for managing their own health (97%)**,



not everyone feels equipped to self-manage common health problems.

This is driven by younger age groups with nearly one in five (45%) of **Gen Z** and a third (34%) of **Millennials** agreeing they lack information.

Feel they lack information:

Gen Z – 45%



Millennials – 34%



While Baby Boomers (15%) and Gen X (22%) are more likely to feel they know enough.

Although older Australians lift these numbers and believe they do have information available to them, a significant proportion (85%) **agree they should do more to improve their health**



and the same number (84%) **want to improve their skills and knowledge** so they can be more engaged in the management of their health.



27%

More than one quarter of Australians believe they don't have the information they need to sufficiently manage their health.



When it comes to health literacy just one in five Australians (22%) rate their health literacy at a high level.

Australians self-reflect on their levels of health literacy



High 22%



Medium 48%



Low 30%



Just **one in four (23%)** are confident they have the skills & knowledge to **engage in actions to prevent illness.**

High 37%

Medium 40%

Low 23%

One third (33%) are confident they have the skills & knowledge to **access and understand credible digital health services.**

High 28%

Medium 39%

Low 33%

One in four (24%) are confident they have the skills & knowledge to **accurately identify symptoms and follow health advice.**

High 32%

Medium 43%

Low 24%

One in four (23%) are confident they have the skills & knowledge to **understand important health information.**

High 36%

Medium 41%

Low 23%



What's happening online?

The role of online health resources and digital technologies is immense when it comes to health and self-care – spanning from websites, apps and social feeds.

The opportunity to enhance education, engagement and monitoring is considerable, with the significant number of Australians heading online.

However, among the major challenges Australians face when utilising digital health technologies is finding credible and quality information, and then understanding it.

The results confirm most Australians are online when it comes to everyday health needs, with four in five (**81%**) using **health websites** for information when managing a common health condition – at least occasionally

81% use health websites



Half (50%) are using health apps to find this information



One in three (39%) use social media for this



Two thirds of Australians (66%) confirm they read information on health websites and apps about their common health conditions before seeking medical advice from a GP or pharmacist.

Millennials lead the digital charge with **80%** going online for healthcare information before seeking medical advice from a GP or pharmacist.

Gen Z is not far behind at **75%** and **Gen X** is also savvy online with **67%** searching for information on a device ahead of visiting a healthcare professional.

Baby Boomers are less engaged, but one in two (**47%**) are likely to have sought out information before talking to a healthcare professional.

Two in five (**39%**) Australians **read health information on social media platforms**, either directly from their social feed or through patient/support groups. This is again driven by **Gen Z** – **57%** and **Millennials** – **54%**, in comparison with **Gen X** – **41%** and **Baby Boomers** – **14%**.



Two in five Australians read health information on social media platforms, either directly from their social feed or through patient/support groups.





On average, two-thirds of Australians seek information online before visiting their doctor or pharmacist.

The findings confirm over one third of Australians (37%) find it difficult to navigate health websites and apps.

Importantly there are people not using digital or social platforms for health information and wouldn't know how. Just 5% of people have never used a health website and about one in ten (13%) haven't tried a health-related app. And nearly one quarter (23%) have never used social media for health information.

Online information understanding not uniform.

Despite the high numbers turning to online sources, many admit they struggle to find the right information with

52%
having trouble identifying credible sources of information and

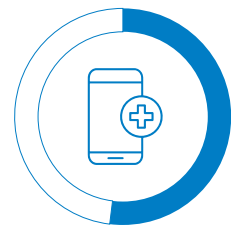
37%
finding it difficult to navigate their way through.

Even where online information is credible, not everyone can take it all in. Only one in ten (9%) state they fully understand what they're reading. About two-thirds (68%) comprehend more than half of the information they find online.

While **Baby Boomers** are the least likely to head online first, they are more likely to comprehend what they're reading with nearly eight out of ten (**78%**) understanding more than half. Younger generations absorb less information (**Millennials – 65%** and **Gen Z – 57%**).

Digital health transparency.

With volumes of health information online – a lack of consistency in how information is presented, conflicting information, who it targets and the quality of the source, creates a confusing landscape. And the findings suggest people are, for the most part, healthy sceptics with online resources and apply caution before accepting what they discover.



Overall half (52%) agree they have difficulty identifying credible sources of digital health information.

One in six Australians (17%) choose not to access digital health services and technology at all because they don't know how to identify the credible ones, or they don't trust them (16%).

One in eight (13%) don't access digital services and technology when they have a health condition because there is too much content, it's difficult to read or understand.

2/3

of Australians are going online before seeing a doctor/ pharmacist.



Many Australians report trusting government health-related websites, with 44% indicating they believe the information they find there.

Sites recommended by healthcare professionals are supported by more than a third

38%

of Australians, while those written by a trusted science or medical communicator or independently verified are trusted by close to one in three

30%

What would increase Australians' trust in, and utilisation of health information websites or services?

It's a Government website – 44%



Found out about it from a health care professional – 38%



Written by a trusted science/medical communicator – 29%



If there was independent verification of its credibility – 28%



Found out about it from family or friend – 13%



It's a major lifestyle publication – 8%



Promoted by a health/fitness influencer – 7%



Written by a trusted journalist – 7%



Nothing would make me trust health information on a website – 13%





**One in three
Australians (31%)
indicated that they
don't engage with
any digital health
services at all.**✦

The self-care opportunity.



Driving self-care with online services✱

A significant proportion of Australians – more than two-thirds (69%) – are choosing to engage in their own health management using digital health services to seek advice for short term health conditions.

This can range from simply making an online health booking or renewing a script, to telehealth consults. Monitoring apps on smartphones and other devices like smartwatches are a significant part of the digital service mix.

The results found one quarter of Australians (24%) are monitoring their own health with **phone apps and health trackers**, and one in five (19%) have a **smartwatch** strapped to their wrist. One in five (22%) are interacting with their **electronic health record**.

Although the use of digital health services is **led by the younger generations (Gen Z – 76% and Millennials – 80%)**, the majority of older Australians are also utilising these services (**Gen X – 70% and Baby Boomers – 54%**).

People responsible for the healthcare of others, including parents of children under 18 and carers of a person with disability, are also more likely to engage with digital services at a rate like that of Millennials:

Parents – 82%

Carers – 80%

A significant opportunity does, however, remain in the digital technology and health services area with one in three **Australians (31%) indicating they don't engage with any digital health services at all.**

Engagement with digital health services

Online health bookings – 36%

Telehealth – 33%

Mobile phone apps and health trackers – 24%

Electronic health record – 22%

Wearable consumer devices (e.g., smartwatch) – 19%

Instant script – 17%

Wearable medical devices (e.g., glucose monitors) – 5%

No digital health services – 31%

69%

Engaging in their own health via digital health services.



Utilising pharmacy experts✱

As highly qualified and accessible community healthcare professionals, pharmacists play a very central role in helping to manage the health of the community and supporting self-care.

However, the findings also show an opportunity to reinforce the quality advice a pharmacist can provide – notably among younger generations.

Overall, the findings confirm two-thirds of Australians (67%) view pharmacists as professional and (59%) believe them to be trusted healthcare experts.

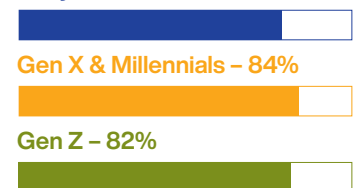
One-third (34%) acknowledge they are good listeners.

Baby Boomers are more likely than their intergenerational counterparts to view pharmacists as trusted and capable (71% vs Gen X 59%, Millennials 53%, and Gen Z 48%).

Nearly three-quarters of Australians (73%) rely on pharmacists for advice, notably on using prescription medicines and three in five (58%) seek guidance on nonprescription medicines.

Their community healthcare contribution is backed-up with **more than 80% of Australians agreeing they'd be likely to seek pharmacist advice for common, short-term conditions.** Interestingly **Baby Boomers** – despite strongly reinforcing the trust and capability of pharmacists – are least likely to seek advice from a pharmacist for short term conditions (**79%** vs **Gen X and Millennials – 84%**).

Likely to seek advice: Baby boomers – 79%



This level of consult on common short-term conditions, however, sits slightly lower to the advice sought from GPs (82%).

The findings however indicate, while pharmacists command a great deal of trust, they're not always seen as a first port of call to assist with self-care and to boost health literacy. While **three in five Australians (59%) rank pharmacists in their top three sources of advice for a common health condition** – the results show people favour seeking out information online (62%) or via a GP consult (80%) ahead of engaging with a community pharmacist.





**59% of Australians
rank pharmacists
in their top three
sources of advice
for a common
health condition.**





Reasons for seeking a pharmacist's advice✦

One in two (46%) believing it's not serious but wanting peace of mind. They are also viewed as faster to access versus a GP (43%) and trusted for being qualified to provide the right advice (37%).

Reasons for seeking a pharmacist's advice

Don't think the health condition is serious enough for a GP but want to ask someone – 46%



Faster to ask a pharmacist than a GP (e.g., no appointment needed) – 43%



Trust that they are qualified to provide the right advice – 37%



Uncertainty about what medication/product is right for me – 35%



It's free, no out-of-pocket expense like with some GPs – 34%



The pharmacist feels approachable – 33%



More information in the pharmacy on what the pharmacist can help with – 22%



Confusion about information read on health sites/apps – 14%



Nothing would drive me to seek advice – 5%





Barriers to seeking a pharmacist's advice✱

In contrast, the barriers to not seeking pharmacist guidance for common health conditions included one in five (21%) are not sure about what the pharmacist can help with, feeling the question is a waste of the pharmacist's time (15%), and embarrassment (19%) surrounding the nature of the health condition they need to discuss.

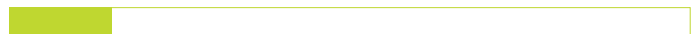
One quarter (26%) also reinforce their relationship with their GP as being a reason not to seek pharmacist advice.



Not sure about what the pharmacist can help with – 21%



The question is a waste of the pharmacist's time – 15%



Embarrassment surrounding the nature of the health condition they need to discuss – 19%

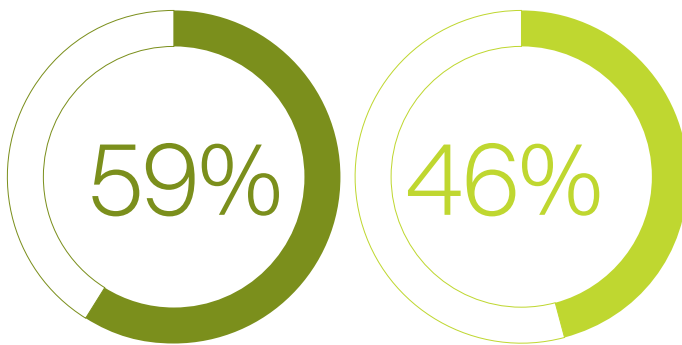


Their relationship with their GP as being a reason not to seek pharmacist advice – 26%





Accessible and approachable experts✱



59% rank pharmacists as a top source for advice about a common health condition

46% seek pharmacist advice about a common health condition for peace of mind

Ranking of importance of Pharmacist advice

Baby Boomers – 72%



Gen X – 61%



Millennials – 49%



Gen Z – 45%



Baby Boomers (72%) and Gen X (61%) favour pharmacists as an information source the most. Nearly half Millennials (49%) and Gen Z (45%) also rank pharmacists highly.



Health literacy gaps✦

Health literacy is a critical component of the health and wellbeing of Australians and supporting self-care.

Overall, the findings uncovered just one in five (22%) Australians view themselves as having high health literacy. Encouragingly the findings showed a significant willingness among Australians to increase their health skills and literacy (84%). Building earlier self-care understanding in younger generations is also firmly supported.

Health literacy levels across Australians is very mixed. Close to one in three (30%) believe their health literacy levels are low, while one in two (48%) believe they have a medium level of literacy with health.



Overall, the findings show, one quarter of Australians (27%) believe they don't have the information or skills needed to self-manage common health conditions.

This view is led by younger generations (Gen Z – 45%, Millennials – 34%, Gen X – 22%, Baby Boomers – 15%) indicating older Australians are slightly more satisfied with the level of knowledge they've acquired in their lives.

Elements of health literacy

23%

have a low level of engagement to prevent illness.

24%

have a low ability to accurately identify symptoms and follow health advice.

23%

have a low understanding of important health information.

33%

have a low ability to access and understand credible digital health services.



Health literacy for youth✱

Nine out of ten Australians say parents (92%) or schools (88%) should do more to increase health literacy in children.



Health literacy for youth

Overwhelmingly the findings confirm a strong desire for younger generations to be well informed and equipped when it comes to their health. **Nine out of ten (90%) Australians say parents (92%) or schools (88%) should do more to increase health literacy in children.**

Supporting the importance of children gaining health literacy skills early reinforces how much the community understands society will be better off with younger generations becoming more knowledgeable and well-equipped when it comes to health.

Younger generations are particularly supportive of this - with Gen Z (91%) and Millennials (93%) more likely to say schools should do more in health literacy skills. Gen X (88%), Baby Boomers (82%).

Whose role is it to teach health literacy to children?

Parents – 78%



High school teachers and counsellors (yrs. 7-12) – 52%



Primary school teachers and counsellors (yrs. 1-6) – 48%



GPs – 52%



Health care professionals (excl. GPs) – 41%



Family/friends – 40%



Through community programs – 35%



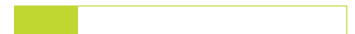
Research it themselves – 27%



Their peers – 24%



All of the above – 19%





Medicines literacy✦

While medicines are safe and effective when used appropriately, all Australians need the knowledge and skills to use prescription and nonprescription medicines responsibly and appropriately.

When it comes to specific information relating to use of medicines, the findings show 90% of Australians state they always read and follow medicine instructions for use.

More than two in five (43%) don't know what a 'combination' is and how to use these products responsibly. In addition:

One quarter of Australians

25%
don't know what an active ingredient is.

54%
More than half do not keep a list of all their medications and notify their healthcare professionals of any changes.



Three in five Australians (58%) rely on advice from their pharmacist for nonprescription medicines.

Three quarters (73%) rely on pharmacists for advice on prescription medicines.





Conclusion✦

These survey findings have uncovered important opportunities for policymakers, healthcare professionals and healthcare advocates to support people in managing common, everyday conditions and keeping healthy.

Overwhelming evidence confirms that empowered consumers, supported to take greater ownership of their health through self-care, achieve better health outcomes and incur lower health costs¹.

Recent economic modeling² reveals that greater self-care has the potential to save Australia's healthcare system between \$1,300-\$7,515 per hospital patient, per year, and significantly lower hospital readmission rates³.

Increasing consumers and HCPs capabilities will help to foster a healthier population and responsibly support the sustainability of healthcare services and funding.

There is evidence up to 80% of heart disease, stroke and type 2 diabetes, and over a third of cancers, could be prevented through evidence-based self-care – eliminating or reducing exposure to the risk factors of tobacco use, unhealthy diet, physical inactivity and excessive alcohol consumption⁴.

In Australia, this means that by 2025, an estimated 29,300 lives could be saved through utilising self-care to enhance preventive action and reduce chronic conditions⁵.

Although the findings show a relatively low level of engagement in health across the population, positively, there is a very strong sense of responsibility to do more with our health. This sets a very firm foundation for education and an activation of pathways to build improved self-care behaviours around healthcare.

Health literacy is very central to this and dependent on an individual not just understanding information, but how it applies specifically to their journey in maintaining their health. Online resources and digital technologies will increase in use – but ensuring the right information is prioritised and the information can be utilised effectively towards health outcomes is critical.

The findings confirmed that nine in ten Australians don't fully understand the information they uncover online, while half of Australians have difficulty identifying credible sources of digital health information. Helping Australians navigate online health resources is therefore extremely important – this includes ensuring information is clear and easy to review and interpret, and credible resources are clearly identifiable.

Reinforcing the critical role of pharmacists – beyond prescription medicines – is also essential. Not only can their role in general health conditions be reinforced as an accessible expert but they can also assist in guiding and driving their customers to better understand how the information they locate online applies to them specifically.

All groups interested and focussed on health have a role to play in supporting and empowering the community in their everyday healthcare needs. We hope this new information resource can play a role in guiding future self-care policies, strategies and initiatives to build greater impact and contribution to the health of Australians.

1. Reference: Hibbard, J.H., J. Greene, and V. Overton, Patients with Lower Activation Associated with Higher Costs; Delivery Systems Should Know Their Patients' 'Scores'. Health Affairs, 2013. 32(2): p. 216-222.

2. Mitchell Institute for Education and Health Policy "Self-care and health: a national blueprint" - <https://www.u.edu.au/sites/default/files/mitchell-institute-self-care-for-health-a-national-policy-blueprint.pdf>

3. Roughead, L., S. Semple, and E. Rosenfeld, Literature Review: Medication Safety in Australia. Sydney: Australian Commission on Safety and Quality in Health Care, 2013.

4. Reference: World Health Organization, Global Action Plan for the Prevention and Control of Noncommunicable Diseases 2013-2020.

5. Reference: World Health Organization. Noncommunicable Diseases (Ncd) Country Profiles 2018: Australia 2018; Available from: https://www.who.int/nmh/countries/2018/aus_en.pdf?ua=1.



Empowering individuals to take greater responsibility for their physical and mental health management and outcomes should be a defining characteristic of Australia's healthcare systems and services.



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