

PHARMACY GUILD OF AUSTRALIA

THE 2016 HEALTHY FUTURES REPORT PART 1

eHealth, Dr Google and the
New Generations



The Pharmacy
Guild of Australia

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CONTENTS

| | |
|---|----|
| Contents..... | 2 |
| Research objectives | 3 |
| Research methodology..... | 4 |
| A note on the generations..... | 4 |
| 2016 Healthy futures report: eHealth, Dr Google and the New Generations – Part 1 | 5 |
| Executive summary | 5 |
| Results | 7 |
| Medicine advice-seeking..... | 7 |
| eHealth record keeping | 8 |
| eHealth records data inclusions | 10 |
| Health service visits and prescriptions..... | 10 |
| Prescription medicines vs Pharmacist only medicines vs pharmacy medicines vs complementary medicines | 11 |
| Prescription repeat/re-fills under authority of pharmacists..... | 13 |
| Prescription medicine usage | 14 |
| Longer than one week..... | 14 |
| Missed doses..... | 15 |
| Effectiveness of prescriptions when dosages are missed | 16 |
| Demographics overview..... | 18 |
| Gender and age..... | 18 |
| State..... | 20 |
| Education..... | 20 |
| Employment status | 21 |
| Household type | 21 |
| Income..... | 22 |

RESEARCH OBJECTIVES

In January 2016, the Pharmacy Guild of Australia commissioned McCrindle to undertake research into Australian attitudes, behaviours and expectations regarding their future health and medicine management.

A range of topics were explored amongst 1,027 Australians across all ages of the general public above the age of 18. These included, where Australians go to for health and medical advice, their perspectives on eHealth and electron/online medicine record keeping, the role of pharmacists in prescribing chronic therapy prescription medicines, and adherence to medication regimes including attitudes towards missed doses. The results from this survey have been compiled into the **Healthy Futures Report: eHealth, Dr Google and the New Generations Report – Part 1**.

In addition to testing the above topics among the general Australian public, 523 Australians above the age of 50 who take ongoing medications for at least one chronic therapy condition were asked to provide their views on chronic therapy management, medication management, and the use of dose administration aids. The results from this survey have been compiled into **The Healthy Futures Report: eHealth, Dr Google and the New Generations Report – Part 2**.

These results will be shared by social researcher Mark McCrindle and Kos Sclavos at APP 2016 Conference from 17-20 March at the Gold Coast, Australia.

RESEARCH METHODOLOGY

The *2016 Health Futures Report: eHealth, Dr Google and the New Generations* is the analysis of data gained through a quantitative survey launched to a national panel of Australians, in field from 25th January to 29th January, 2016.

Survey 1: 1,027 members of the Australian general public

This survey was launched to a nationally representative sample of Australians aged 18 and older, yielding 1,027 completed responses. Throughout this report, information gained through the national survey is presented in **navy** and **yellow** graphs.

A note on the generations

Reference to the generations throughout this report refer to the following age categories:

- Generation Y: 22-36 year olds (those born from 1980-1994)
- Generation X: 37-51 year olds (those born from 1965-1979)
- Baby Boomers: 52-70 year olds (those born from 1946-1964)
- Builders: 71+ (those born before 1946)

2016 HEALTHY FUTURES REPORT: eHEALTH, DR GOOGLE AND THE NEW GENERATIONS – PART 1

EXECUTIVE SUMMARY

Medicine advice seeking

Australians identified that pharmacists were the second most (61%) trusted source of advice on medicines, vitamins and supplements, just behind Doctors/GP's (77%). Doctor Google rounded out the top 3 with 36% of Australians going online to search for advice on their medicines.

eHealth

1 in 7 (16%) Australians have already registered with the Australian eHealth Records System indicating that they are very comfortable with the digitisation of medical records. While more than 1 in 2 (53%) are very or somewhat comfortable with electronic record keeping, a further 1 in 7 (15%) Australians indicate they are not at all comfortable with the new era of keeping electronic records.

More than 1 in 2 (55%) Australians expect the Commonwealth Government to keep full health records to establish a national eHealth recording keeping scheme. The establishment of a national eHealth scheme is opposed by nearly 1 in 5 (18%) Australians who prefer anonymity and don't want any of their health records available as part of a national eHealth scheme.

There was a preference for the eHealth record system to record only prescription medications by more than 1 in 2 (52%) Australians. Nearly 1 in 5 (18%) expressed openness to having all their medication records on the eHealth records system and indicated that all medication records, from prescription medicines records to complementary medicines should be recorded.

Pharmacists prescribing prescription repeats/re-fills

High levels of trust were expressed by Australians, with 5 in 6 (82%) open to Pharmacists autonomously undertaking the role of prescribing repeat/re-fills for prescription medicines for ongoing therapy medications based on the pharmacist's expertise or with doctor's consent.

Medicine usage

3 in 5 Australians (62%) have taken medication which lasts longer than a week in the last 12 months. Of those who have taken prescription medication which lasted longer than a week in the last 12 months, nearly a third (31%) missed at least the equivalent of 3 doses a month. Nearly 1 in 10 (9%) have missed the equivalent of 9 doses a month for daily medicine.

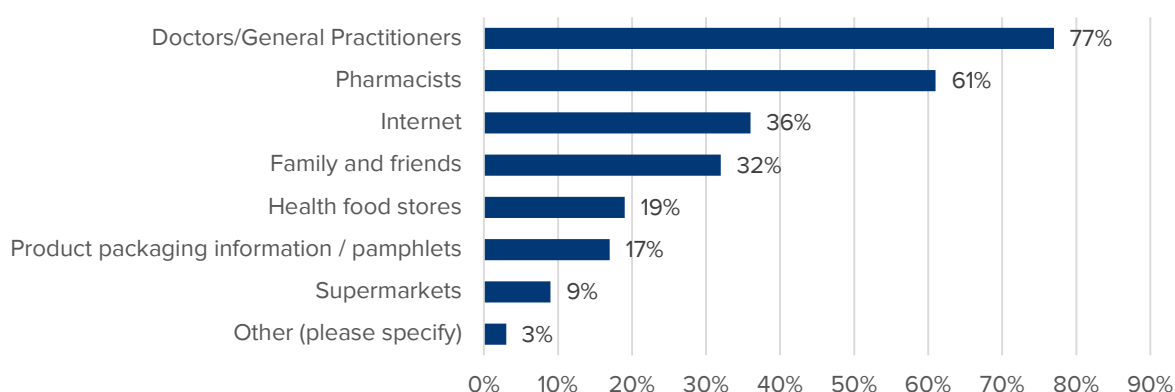
Of those who had missed a dose of their medication, 17% perceived that it would have no impact on the effectiveness of the medication. Nearly 2 in 3 (62%) stated it slightly or somewhat reduced the effectiveness of the medication and a further 1 in 5 (21%) stated it significantly reduced the effectiveness of medication showing greater seriousness towards the situation.

RESULTS

MEDICINE ADVICE-SEEKING

Q. Where do you get trusted advice on medicines, vitamins and supplements? Please select as many options as apply.

(n = 1,027)



Pharmacists are close behind general practitioners as individuals that Australians would trust when seeking medical advice. More than 3 in 4 Australians (77%) gain advice from their doctor or GP, and 3 in 5 (61%) gain advice from their pharmacist.

Online information is more critical than ever before, and Doctor Google has become a greater source of trusted medical advice in Australia (36%) than the advice provided by family and friends (32%). Less than 1 in 5 seek information from health food stores (19%) or product packaging (17%).

More than 2 in 5 (44%) Gen Ys use the internet to gain trusted advice on medicines, vitamins, and supplements compared to just 1 in 5 (18%) Builders. Younger people are also more likely to get trusted advice on medicines, vitamins, and supplements from family and friends than the older generations.

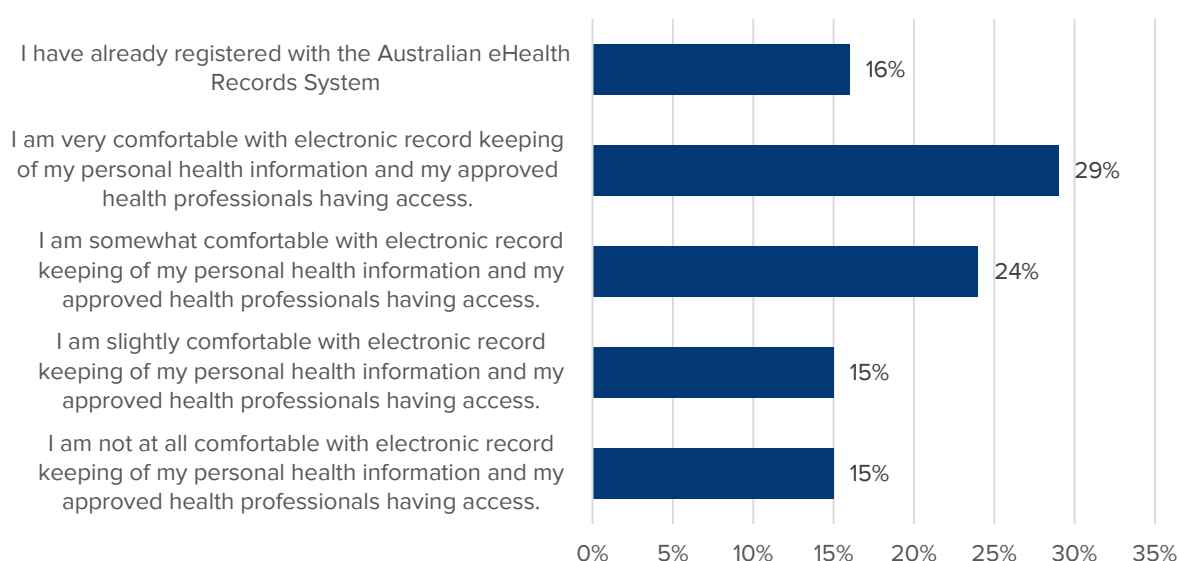
| Age | 22 - 36 | 37 - 51 | 52 - 70 | 71+ |
|---|---------|---------|---------|-----|
| Proportion who seek medical information on the internet | 44% | 38% | 30% | 18% |
| Proportion who seek medical information from family and friends | 44% | 32% | 21% | 16% |

Only 1 in 10 (10%) males look for medical advice on product packaging or pamphlets compared to nearly 1 in 4 (23%) females.

Other responses (3%) included other health professionals, lecturers, government sources, textbooks, television documentaries, the radio and alternative health practitioners.

eHEALTH RECORD KEEPING

Q. Which of the following best describes your attitude towards electronic record keeping of personal health information? (n = 1,027)



1 in 6 Australians (16%) report that they have already registered their details with the Australian eHealth Records System, indicating a strong openness to moving towards the digitalisation of medical records.

A further 53% feel very or somewhat comfortable with electronic record keeping of their personal health information and approving access to these records by their health professionals.

1 in 7 (15%) are only slightly comfortable with the digitalisation of medical record keeping, and a further 1 in 7 (15%) indicate that they are not at all comfortable with this new era of record keeping.

The Baby Boomers are slightly more reluctant towards electronic record keeping of their personal health information than other generations.

| Age | 22 - 36 | 37 - 51 | 52 - 70 | 71+ |
|---|---------|---------|------------|-----|
| Proportion who have already registered with eHealth | 18% | 16% | 17% | 19% |
| Proportion who are very or somewhat comfortable with electronic records | 56% | 53% | 47% | 54% |

Only 1 in 10 (10%) males look for medical advice on product packaging or pamphlets compared to nearly 1 in 4 (23%) females.

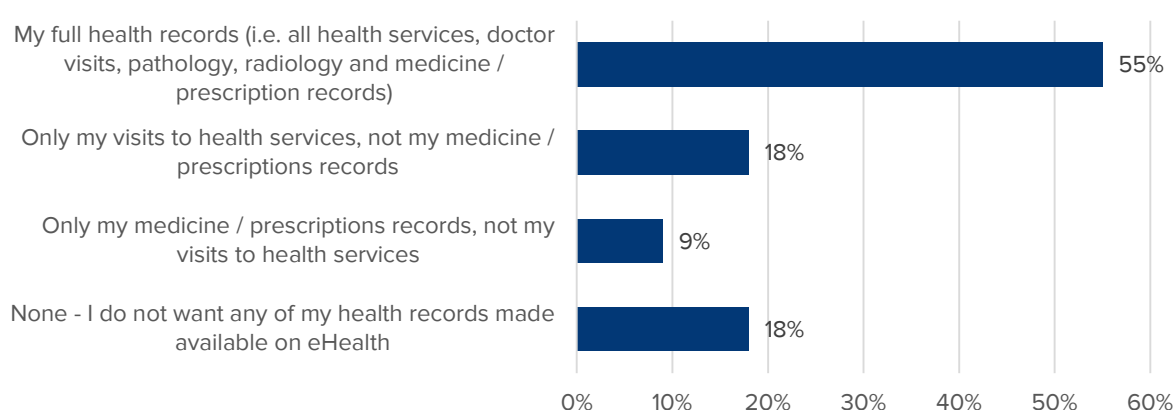
Australians with a bachelor degree or higher (62%) are more likely than those with a lower qualification (49%) to indicate that they are very or somewhat comfortable with electronic record keeping of their medical records.

Those who live in a household that has an income of \$2,000 or more per week (61%) are also more likely to be comfortable with electronic keeping of their medical records compared to those who live in a household with an income of less than \$2,000 per week (11%).

eHEALTH RECORDS DATA INCLUSIONS

Health service visits and prescriptions

Q. There have been many false starts establishing an electronic health record. What type of personal health information should the Commonwealth Government focus on capturing first to establish a national eHealth scheme that will have the trust and support of the Australian public? (n = 1,027)



More than half of Australians (55%) have no reservations regarding the type of personal health information that the Commonwealth Government should focus on capturing for the establishment of a national eHealth scheme. This indicates high levels of trust among the Australian public regarding the appropriate use of health data collected by the Australian Government.

1 in 6 Australians (18%) however, indicate that they have a preference to have only their visits to health services captured, not their medicine or prescription records. A further 1 in 11 (9%) would prefer only their medicine and prescription record to be captured.

The remaining 1 in 6 Australians (18%) express a preference to remain anonymous on Australia's eHealth scheme, not wanting any of their health records to be made available on eHealth.

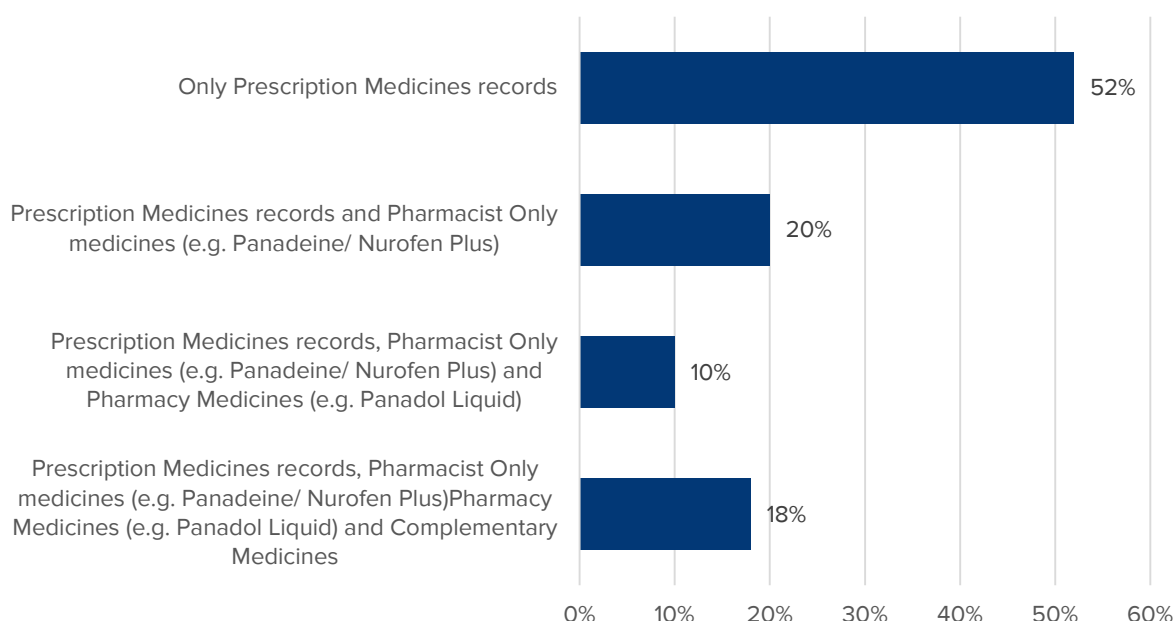
Males (58%) are more likely than females (51%) to indicate that they think their full health records should be captured by the national eHealth scheme.

Australians without a bachelor degree (21%) are less likely to be open to their records being available on eHealth compared to Australians with a bachelor degree or higher (12%).

Lowest income earners (less than \$699 per week) are the most reserved about having their personal records kept on eHealth with 29% not wanting any health records kept on eHealth (cf. 18% overall).

Prescription medicines vs Pharmacist only medicines vs pharmacy medicines vs complementary medicines

Q. When considering just the medicine / prescription component of the eHealth record system, what type of medicine records do you think should be kept? (n = 1,027)



Australians indicate that there should be an alignment between the information captured by the eHealth record system and the information that is provided to them by their doctor or GP, with 52% indicating that an Australian eHealth record system should only keep record of **prescription medicines**.

Nearly half (48%), however, also indicate that a record of **pharmacist only medicines** should be kept. 10% expand this to include **pharmacy medicines**, and a further 18% indicate that this should be extended to include **complementary medicines**, as such offering greater visibility over a person's complete medicine record history.

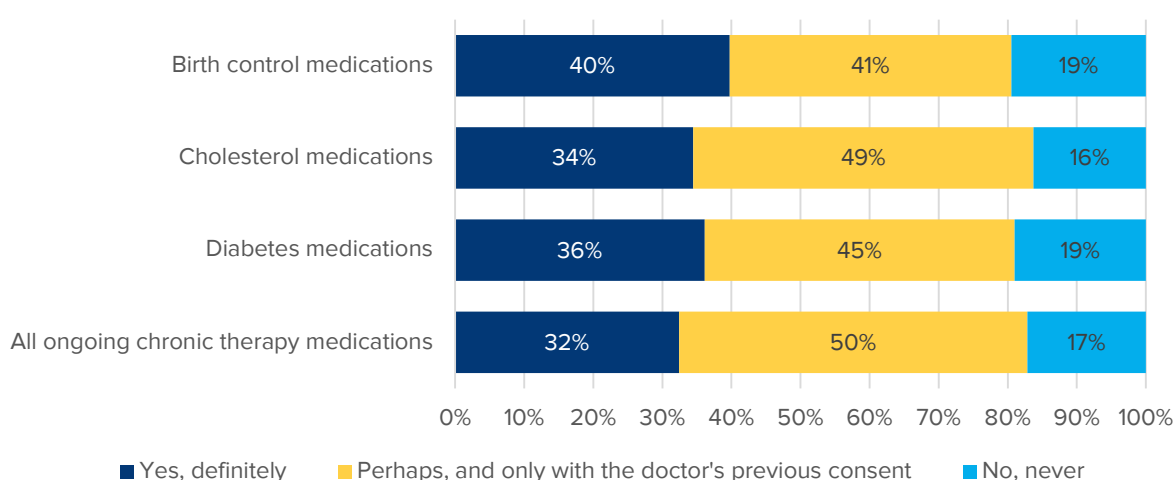
The older generations are more concerned about the amount of information kept about their medicine purchases than the younger generations with Baby Boomers (59%) more likely to indicate that they think only prescription medicine record should be kept on the eHealth record system compared to Gen Y (44%).

| Age | 22 - 36 | 37 - 51 | 52 - 70 | 71+ |
|--|---------|---------|---------|-----|
| Proportion who think Only Prescription Medicines should be recorded on the eHealth record system | 44% | 52% | 59% | 53% |

PRESCRIPTION REPEAT/RE-FILLS UNDER AUTHORITY OF PHARMACISTS

Q. If your doctor were to place you on a chronic therapy prescription medication in an ongoing way, do you think that the pharmacist should be able to continue your therapy for subsequent medication refills without the need to go back to the doctor for a prescription? Please answer on behalf of all medications and specific medications below.

(n = 1,027)



Australians have high levels of trust in their pharmacist's ability to deliver subsequent medication repeat/refills for chronic or ongoing therapy medications.

When Australians were asked whether a pharmacist should be allowed to continue therapy for various chronic or ongoing medications without requiring the patient to visit the doctor for subsequent prescriptions, approximately 1 in 3 Australians agreed, with the strongest agreement pertaining to **birth control medications** (40%).

Less than 1 in 5 Australians (19% or fewer) across the various categories indicate a preference for a **subsequent doctor's visit** in order to continue medication therapy. In the lowest instance, just 1 in 6 Australians feel that a **doctor's visit is necessary to fill a prescription** for cholesterol medication (16%).

Females (44%) are more likely than males (35%) to indicate that the Pharmacist should definitely be able to continue ongoing therapy with subsequent repeats/re-fills without going back to the doctor to get another prescription.

The older generations are the most likely to indicate that the Pharmacist should never be able to continue providing repeats/re-fills for birth control medications without a prescription from the doctor.

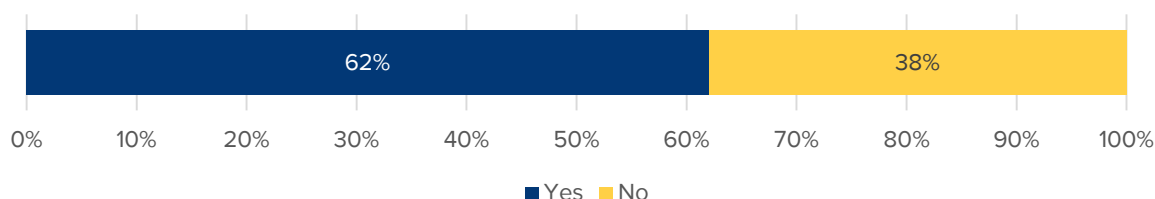
| Age | 22 - 36 | 37 - 51 | 52 - 70 | 71+ |
|---|---------|---------|---------|-----|
| Birth control medications, yes definitely | 14% | 18% | 27% | 26% |
| Cholesterol medications, yes definitely | 34% | 43% | 33% | 22% |

Australians living in a household in the higher income bracket (\$2,000 or more/week) (47%) are more likely to suggest that Pharmacist's should definitely be able to continue providing repeat/re-fills for birth control without having to return to the doctor than those (37%) who fall into the lower income bracket (less than \$2,000/week) (cf. 40% overall).

PRESCRIPTION MEDICINE USAGE

Longer than one week

Q. In the last 12 months, have you taken any medication that lasts for longer than a week that was prescribed by your doctor?



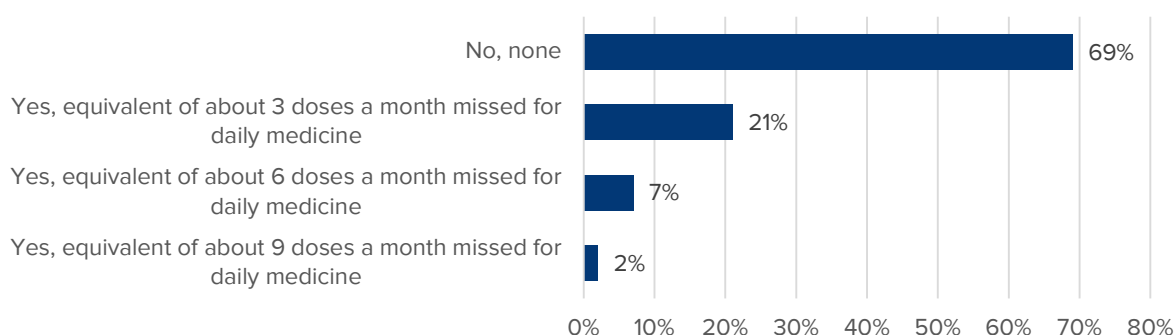
3 in 5 Australians (62%) have taken medication which lasts longer than a week in the last 12 months.

Over 7 in 10 (71%) Baby Boomers had taken prescribed medication for longer than a week in the last 12 months compared with Builders (83%) (cf. 62% overall).

Missed doses

Individuals who indicated 'Yes' to the previous question (62%; n = 633) were asked to indicate whether they had missed any doses of their prescribed medication regime.

Q. Did you miss any prescribed dose over the course of your medication regime? If your medication regime is ongoing, please indicate how many doses you have missed in the last month. (n = 633)



Nearly a third of Australians (31%) who have taken medication that lasts longer than one week over the last 12-month period have reported missing a dose over their medication regime.

The largest proportion of these (21%) report they have missed approximately the equivalent of 3 doses per month for daily medicine.

The younger generations were more likely to indicate that they had missed doses of prescription medication that they had been required to take for at least a week in the last 12 months.

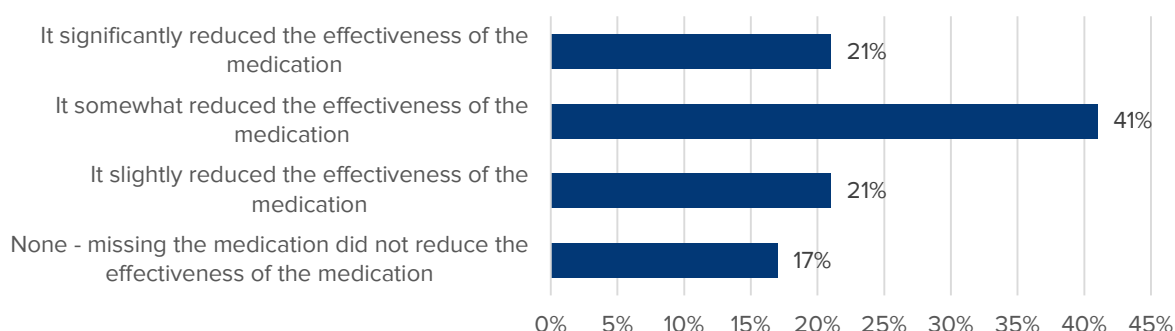
| Age | 22 - 36 | 37 - 51 | 52 - 70 | 71+ |
|--|---------|---------|---------|-----|
| No, none | 67% | 77% | 83% | 90% |
| Yes, equivalent of about 3 doses a month missed for daily medicine | 21% | 14% | 14% | 9% |
| Yes, equivalent of about 6 doses a month missed for daily medicine | 10% | 7% | 1% | 2% |

Employed persons (26%) were more likely than those who are not currently employed (17%) to indicate that they had missed doses in the course of their medication regime.

Effectiveness of prescriptions when dosages are missed

Individuals who indicated 'Yes' to the previous question (31% of 633; n = 195) were asked how they perceived their missed dosage to impact the effectiveness of their medication therapy.

Q. When you missed a dose (or multiple doses), what impact do you think this had on the effectiveness of the medication? (n = 195)



Interestingly, 1 in 6 Australians (17%) who have missed a prescribed dose of their medication regime (lasting at least one week over the last 12 months) perceives that this missed dose has not reduced the effectiveness of their medication.

Most Australians who miss doses of their medication, however, are aware of the consequences. 3 in 5 Australians (62%) admit that missing their dose significantly or somewhat reduces the effectiveness of the medication they have been prescribed.

Younger generations indicated that missing doses reduced the effectiveness of medication whilst the older generations indicated that missing a dose had not affected the effectiveness of the medication they had taken.

| Age | 22 - 36 | 37 - 51 | 52 - 70 | 71+ |
|---|---------|---------|---------|-----|
| None, missing the medication did not reduce the effectiveness of the medication | 7% | 20% | 34% | 33% |

Australians with educational qualifications lower than that of a bachelor degree (22%) were more likely to indicate that missing a dose had no effect on the effectiveness of their medication compared to Australians who have a bachelor degree or higher (12%).



High levels of trust were expressed by Australians, with 5 in 6 (82%) open to Pharmacists autonomously undertaking the role of prescribing repeats/re-fills for prescription medicines for ongoing therapy medications based on the pharmacist's expertise or with doctor's consent.

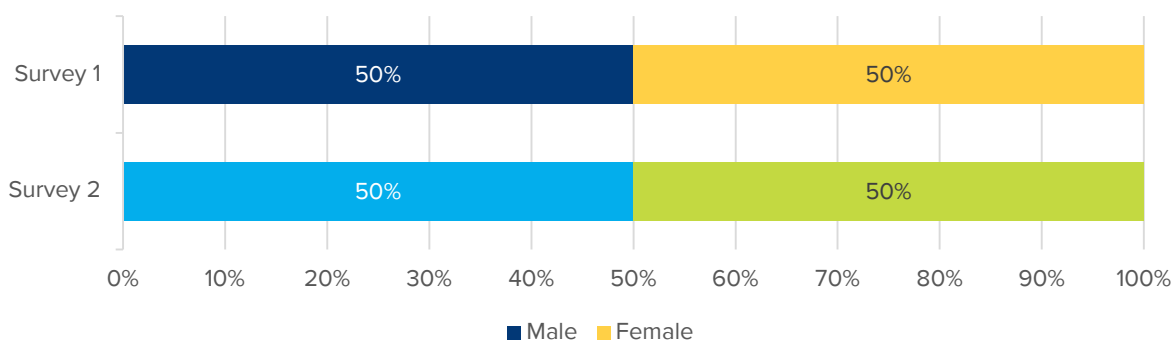
DEMOGRAPHICS OVERVIEW

The following section provides the demographic characteristics of respondents that took part in each of the two surveys:

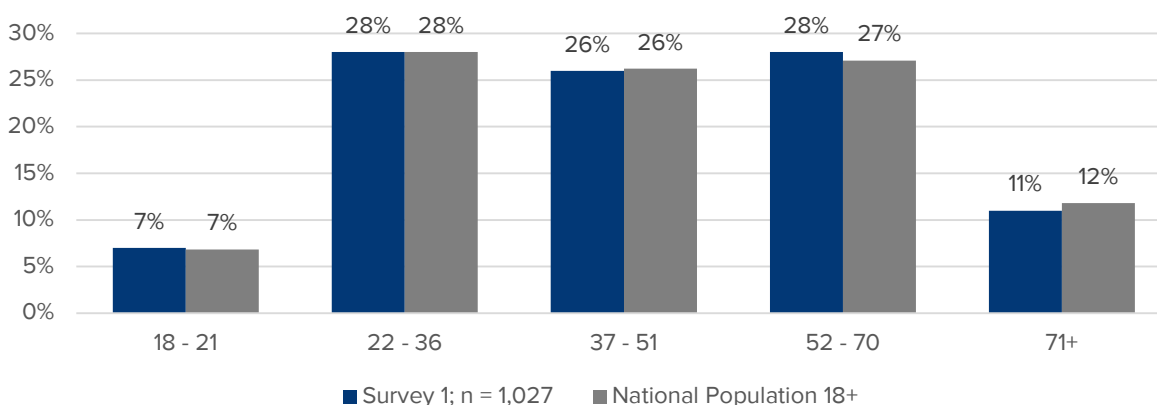
- **Survey 1: 1,027 members of the Australian general public** – Results are displayed above from Survey in the eHealth, Dr Google and the New Generations component of The Healthy Futures Report.
- **Survey 2: 523 Australians aged 50+ who take medicines for chronic illness** – Results are displayed in the Openness, Mood and Perceptions towards Dose Administration Aids component of The Healthy Futures Report.

Gender and age

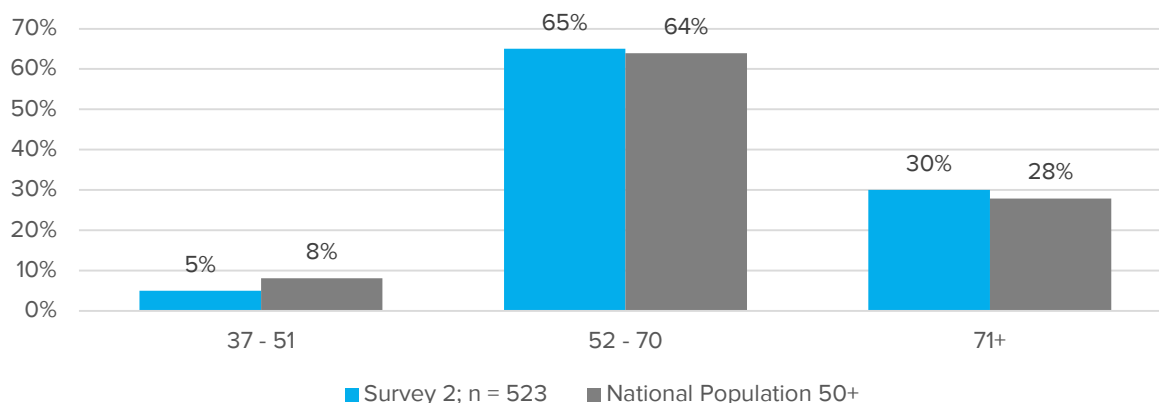
Q. Are you male or female?



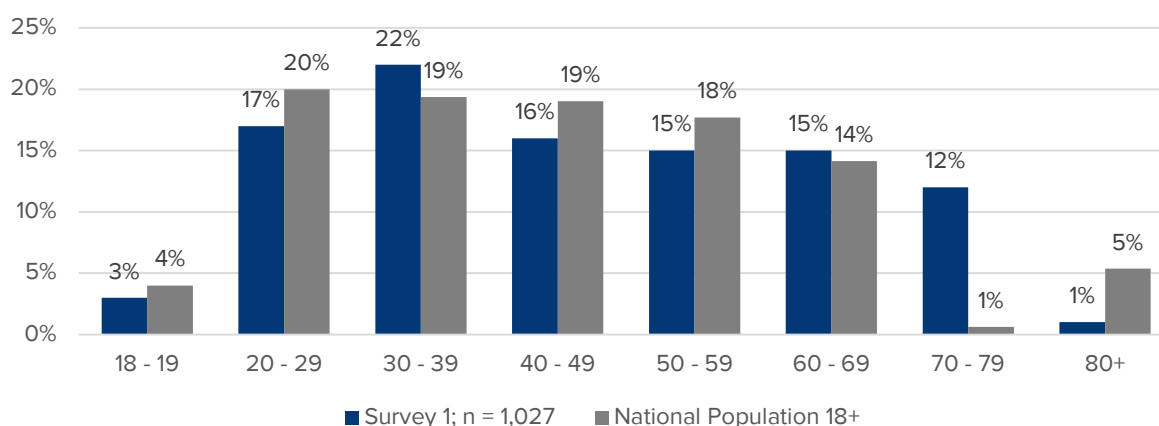
Q. What age will you be in 2016? [By generation]



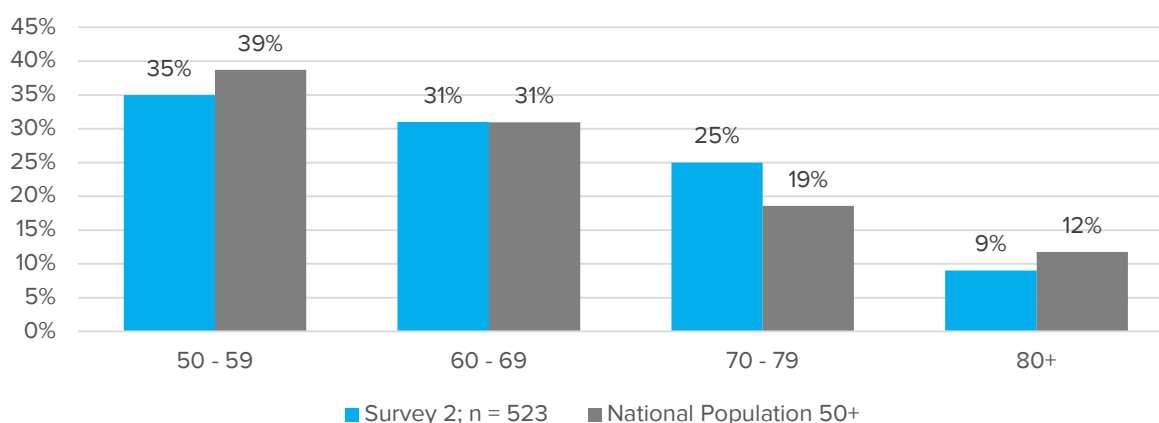
Q. What age will you be in 2016? [By generation]



Q. What age will you be in 2016? [By 10 Year Groupings]

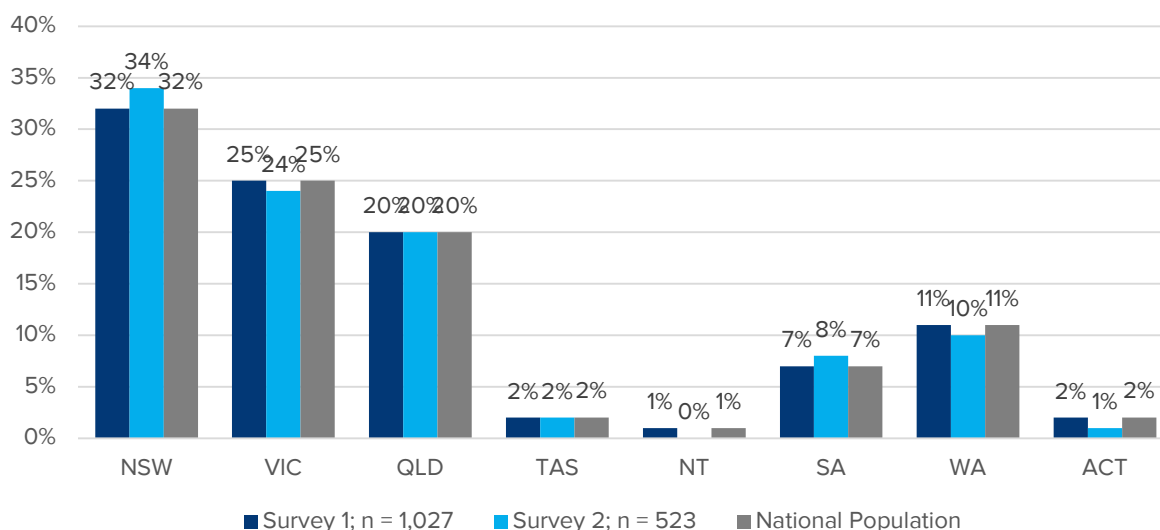


Q. What age will you be in 2016? [By 10 Year Groupings]



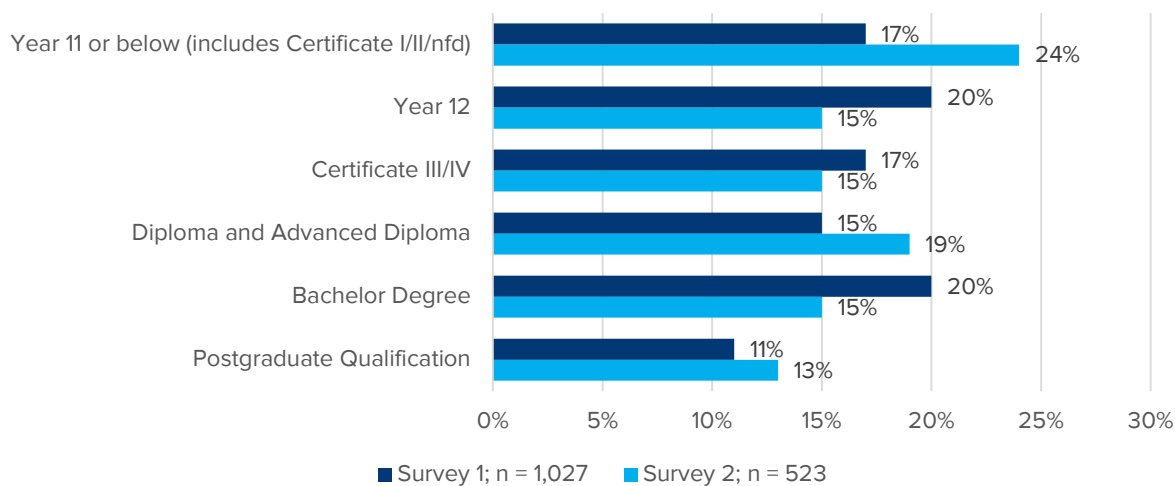
State

Q. Where do you usually live?



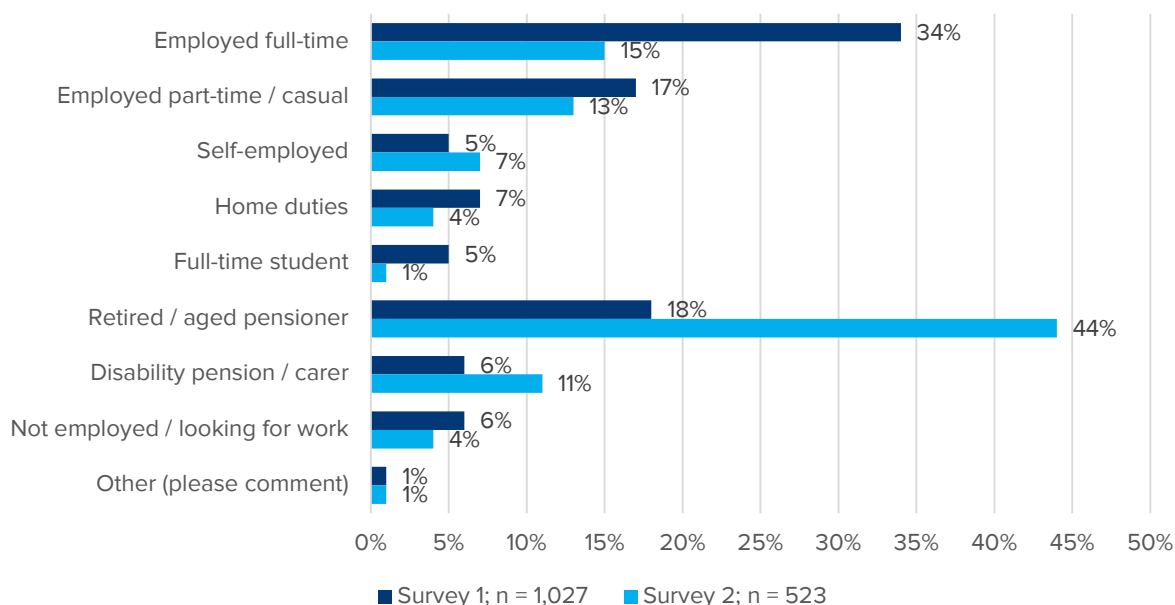
Education

Q. What is your highest level of completed education?



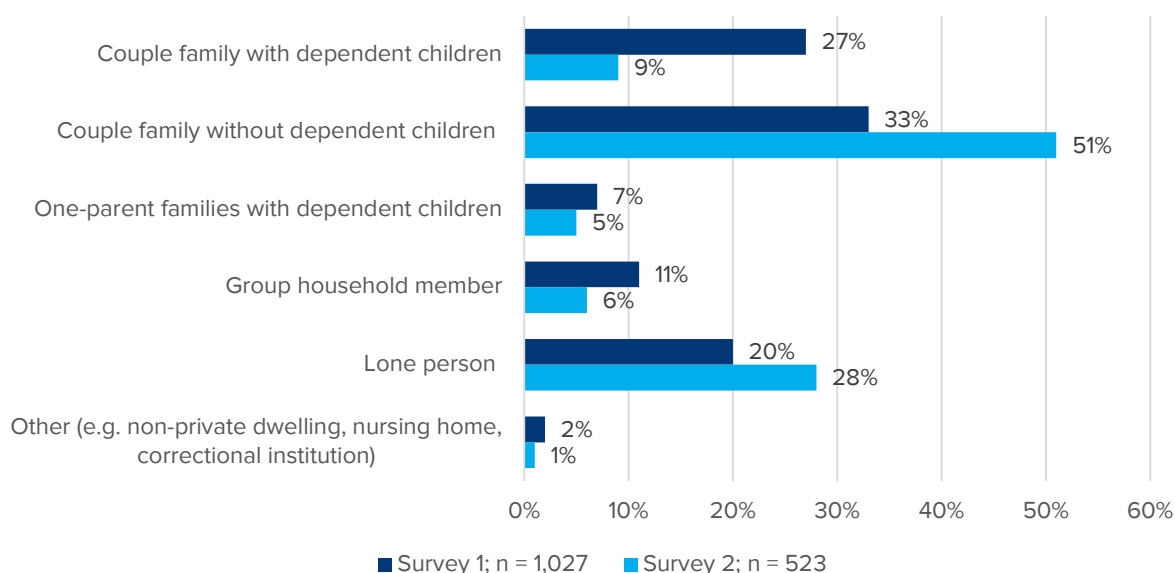
Employment status

Q. Which of the following best describes your employment status?



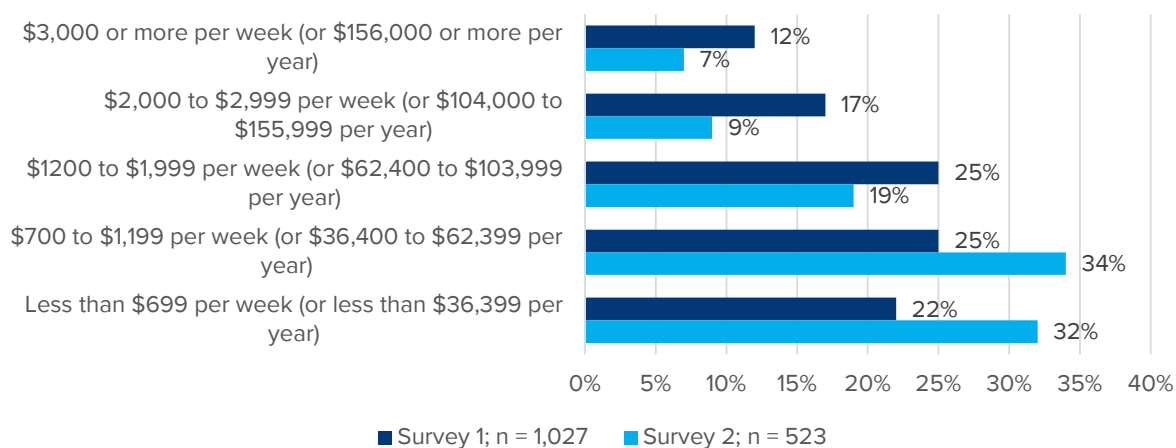
Household type

Q. What type of household do you currently live in?



Income

Q. Which of the following best represents your household's combined gross annual income? (i.e. before taxes).



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