

Bupa Pulse Check



Quantum
Market
Research

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Background and objectives

Bupa is a health and care company committed to helping customers live longer, healthier, happier lives and making a better world. Bupa offer a broad range of services, including aged care and retirement, dental, optical, health insurance, and community wellbeing initiatives, to improve the health of all Australians.

Quantum and Bupa partnered to conduct a study to:

- Provide a robust, reliable and repeatable methodology for monitoring Australian’s attitudes towards their health and wellbeing
- Understand the attitudes, behaviours and ambitions Australians hold towards their own health and wellbeing
- Explore the key enablers and barriers to establishing positive health and fitness related habits and routines
- Establish the role of mental health, and what avenues are being used for assistance
- Determine the role of the COVID-19 pandemic, and expectations for possible future pandemics
- Understand the role of chronic disease



Online survey of n=2,006 Australians aged 18-79
Sample sourced via an online panel provider



10 minute survey



Data weighted to Australian population

Total sample size, n=2,006

	Proportion of sample (weighted) %	Number of respondents n=
Total	100%	2,006
Gender		
Male	50%	1,000
Female	50%	1,004
Non-binary	0%	2
Age		
18-29	22%	434
30-39	18%	365
40-49	18%	356
50-59	16%	316
60-79	27%	535
State		
NSW	32%	636
VIC	26%	517
QLD	20%	407
SA	7%	141
WA	10%	209
ACT	2%	35
NT	1%	16
TAS	2%	45

- The maximum margin of error (at the 95% confidence interval) on the total sample size is +/- 2.2 percentage points.
- Where significance testing has been shown, results are significant at the 95% significance level.
- The project was carried out in line with the Market Research International Standard, AS ISO 20252.
- Incentives provided in line with standard panel rates
- Survey conducted 22nd-30th November, 2022.

Summary of findings – by the numbers

Two in three

are worried about
developing a
chronic illness



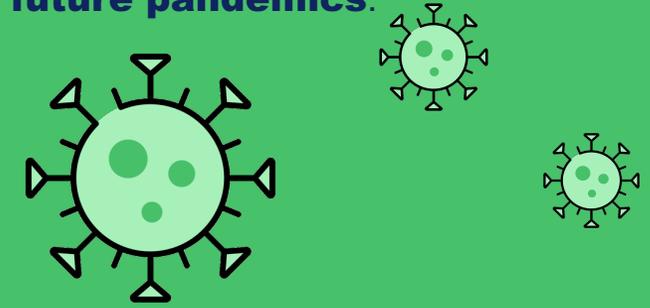
One in ten

value their **quality
of life as poor**



50%

hold concerns about
future pandemics.



**Two in three
Aussies**

aged 18-39 sought
mental health help
over the last 12 months



One in three

use an **app** or
wearable device
to monitor health
and fitness

38%

say they're reducing
alcohol consumption



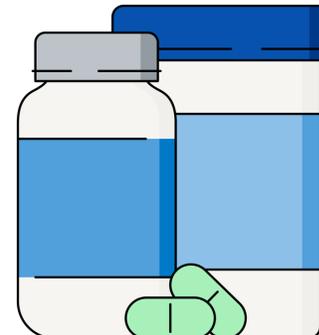
More Australians (**73%**)
use a **streaming service**



than spend time
outdoors
(**66%**)



More than **50%**
take **vitamins or
supplements**



Key findings



While some Australians have emerged from the COVID-19 pandemic feeling refreshed; others have found the past year very challenging.

- Three in ten Australians feel their quality of life has improved over the past year, while another three in ten feel that it has gotten worse.
- Life stage, financial situation and health-related factors such as disability or chronic illness are the key factors that differentiate Australians' perspectives of their personal circumstances over the past 12 months.



Mental health and financial situation are the most important factors determining how we judge our overall quality of life.

- This comes as the [latest Census](#) reported mental and behavioural conditions as the most common chronic condition in Australia, as the country grapples with [rising inflation](#).
- It also highlights the importance of initiatives designed to assist Australians in the area of mental health, as well as the need to support the most financially vulnerable through what is likely to be a challenging economic period.



Australians are engaging in a range of behaviours to manage their health and wellbeing.

- Regularly taking vitamins and supplements is common (57%), as is the use of apps/wearables (32%).
- Active transport (such as walking, running and cycling) is the most common way Australians are getting in their exercise in.
- A quarter (25%) regularly visit an allied health professional.
- Almost two in five Australian adults (38%) indicate they are reducing their alcohol consumption.



Our modern way of life is preventing optimal health and wellbeing, with cost, distractions and busy lifestyles listed as key hurdles.

- Two in five (40%) feel costs are the main barrier to maintaining health and wellbeing, while for 30% a lack of time is cited
- Financial pressures are likely to be exacerbated by rising costs across multiple categories including health.
- Almost three quarters of Australians (73%) indicate that they currently use a streaming service, yet only two thirds (66%) spend time outdoors/in nature.

Key findings



Young Australians are the cohort most likely to be looking to invest in improving their health and wellbeing.



Establishing the right routines and habits is a leading factor in maintaining a healthy lifestyle, according to a third of Australians.



Many Australians feel that the environment is having a negative impact on their mental and physical health.



Two in three Australians (68%) are worried about developing a chronic illness, with back pain and arthritis the top concerns.

- Almost half (49%) of 18-29 year olds identify themselves as someone who likes to explore new trends and try new things in health and wellbeing.
- This cohort were significantly more likely to use services like ClassPass, F45, BodyFit or online exercise programs.
- Encouraging young people to invest in, and actively manage, their own health and wellbeing is an important step in addressing current and future healthcare challenges and easing some of the burden on the system.

- Australians have shared the specific tips and tricks that have resulted in success, including preparing meals in advance (25%), creating incentives/rewards (23%), setting fitness goals (23%), making it fun (22%) and working out with friends (21%).
- Despite this, just under two in five Australians still struggle to manage their health and wellbeing.

- Extreme weather events was the top environmental factor felt to be impacting on Australian's health and wellbeing (13% indicated it was having a major impact). This follows a series of major flooding events across Victoria, South Australia, NSW and QLD.
- Victorians are significantly more likely to feel that extreme weather events have a major impact on their mental/physical health.

- A third of Australians are concerned about three or more chronic illnesses, and concern increases with age.

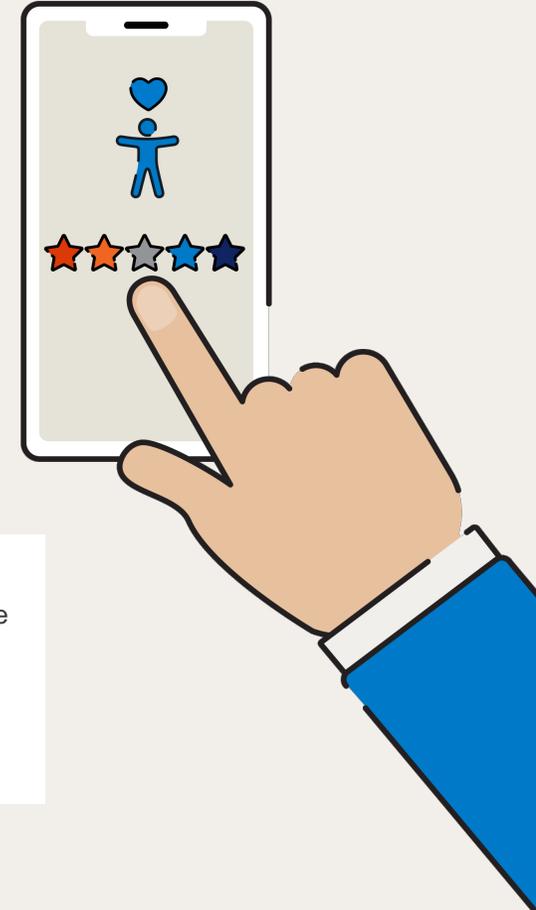
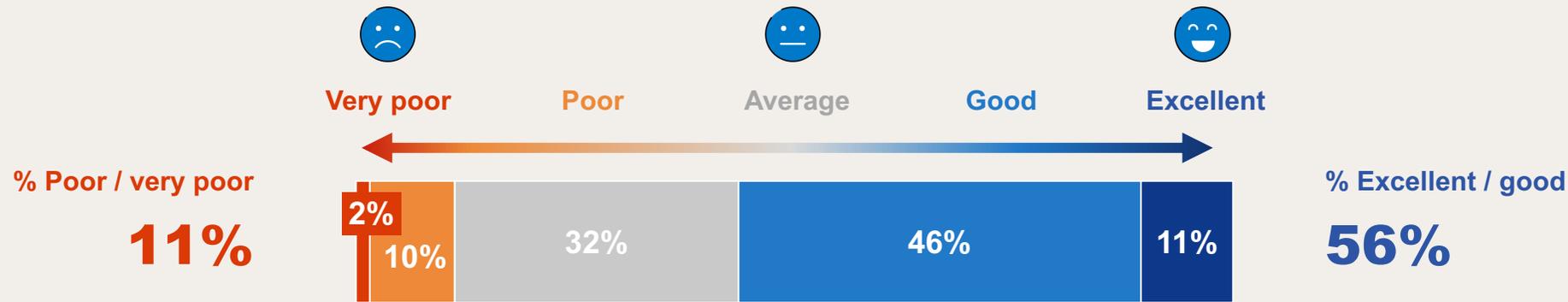


Overall health and wellbeing



Just over half of Australians (56%) rate their quality of life as good or excellent; one in ten (11%) feel it is poor

How would you rate your overall quality of life right now?



The 56% of Australians who rate their quality of life as **excellent/good** are significantly more likely to work full-time (64%), own a home (64%), come from a higher income household of \$100k+ (69%), have a Bachelor degree or higher (66%), live with a partner and no kids (66%) or have children under 5 (65%) and have private health insurance (64%). They are also more likely to rate all aspects of their life significantly more positively.

One in three (32%) feel their quality of life is **average**. They are more likely to be renting (41%) and have a household income of between \$25k-\$75k (40%).

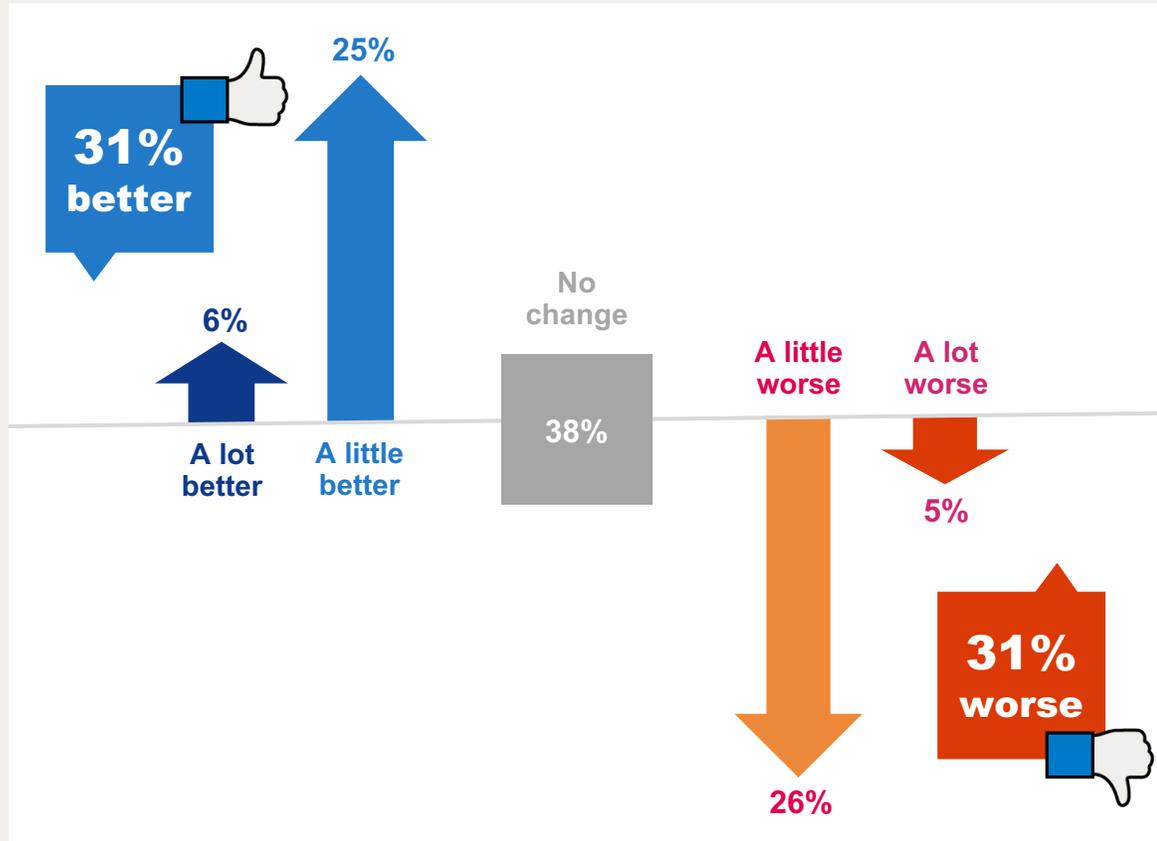
The one in ten Australians (11%) who feel they have a **poor** quality of life are more likely to be aged 40-59 (15%), live alone (18%), rent (15%), have a household income of under \$50k (20%), have a disability (27%) or long-term health condition (22%) and don't have (and are not considering) private health insurance (16%).

Base All respondents (n=2,006)

Q.4. How would you rate your overall quality of life right now?

Australians are divided over whether their quality of life has improved or deteriorated over the past 12 months

How has your overall quality of life changed over the past 12 months?

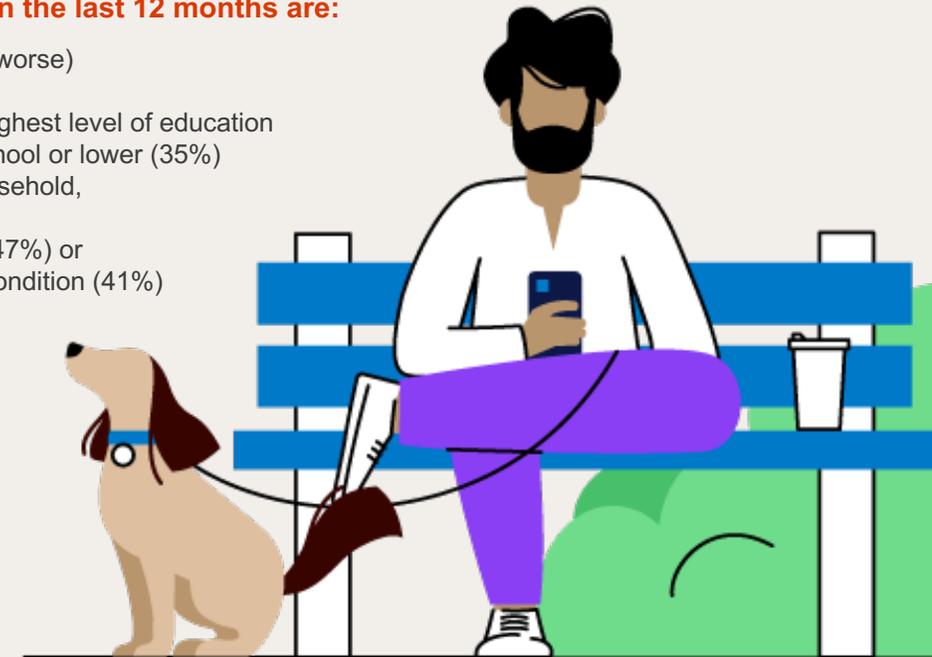


Those significantly more likely to feel their quality of life has gotten better in the last 12 months are:

- Younger, aged 18-39 (41% better)
- Parent of child(ren) under 18 (35%)
- Bachelor degree or higher (37%)
- Work full-time (36%)
- Student (52%)
- Higher household income, \$100k or more (39%)
- Speak a language other than English at home (45%)

Those significantly more likely to feel their quality of life has gotten worse in the last 12 months are:

- Aged 50-59 (41% worse)
- Female (34%)
- Less educated - highest level of education was secondary school or lower (35%)
- Lower income household, under \$50k (37%)
- Have a disability (47%) or long-term health condition (41%)

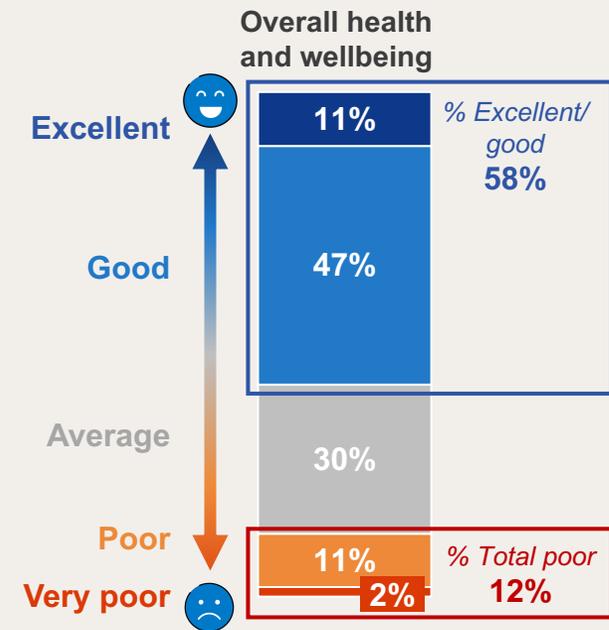


Base All respondents (n=2,006)

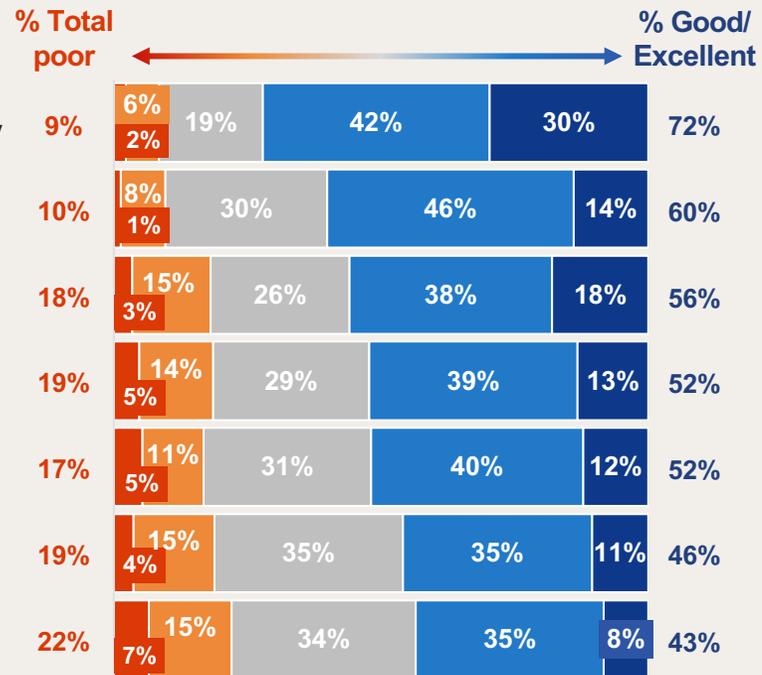
Q.5. How do you feel your overall quality of life has changed over the past 12 months? Is it...

While our relationships with family are largely deemed positive, one in five Australians (22%) rate their financial situation as poor

How would you rate the following aspects of your life?



- Relationship with family
- Nutrition
- Mental health
- Social health (i.e. connections with others)
- Work/business/career
- Physical strength/fitness
- Financial situation



Base: All respondents (n=2,006). Note: n/a removed
Q.6. How would you rate the following aspects of your life?

As many as 58% of Australian adults rate their overall health and wellbeing as good or excellent – a similar proportion to those believing they have a good quality of life.

Relationships with family is the aspect that we are most satisfied with, followed by nutrition.

Where Australians would like to see improvements include physical strength and fitness and their financial situation.

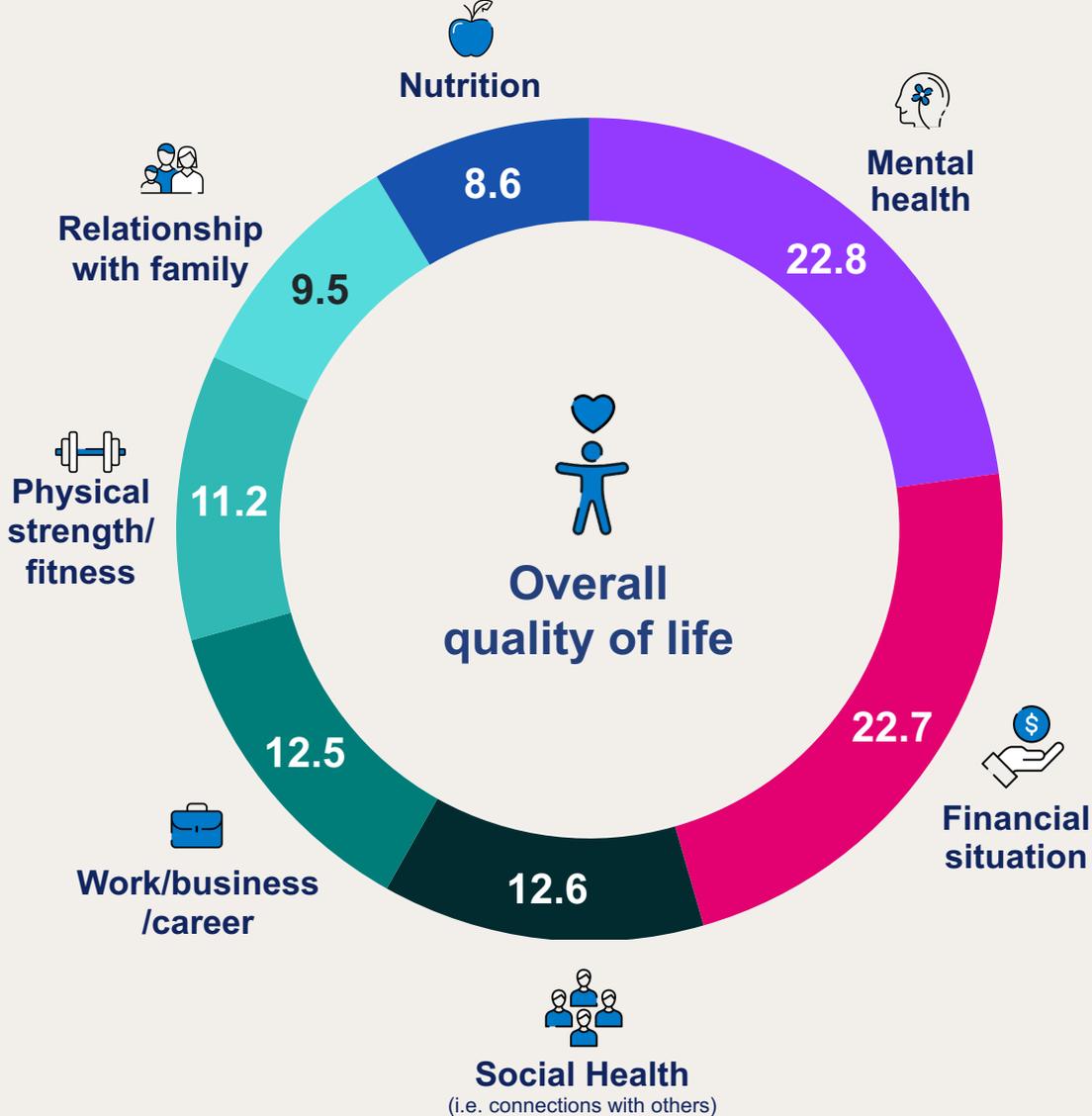


Mental health and financial situation are the biggest drivers of perceived quality of life for Australians

Key drivers of overall quality of life

Mental health and finances were found to be the main drivers impacting Australians perceptions of their overall quality of life. Mental health is a particularly important factor for younger Australians.

This comes as the latest Census reported mental and behavioural conditions as the most common chronic condition in Australia, and the country grapples with rising inflation.

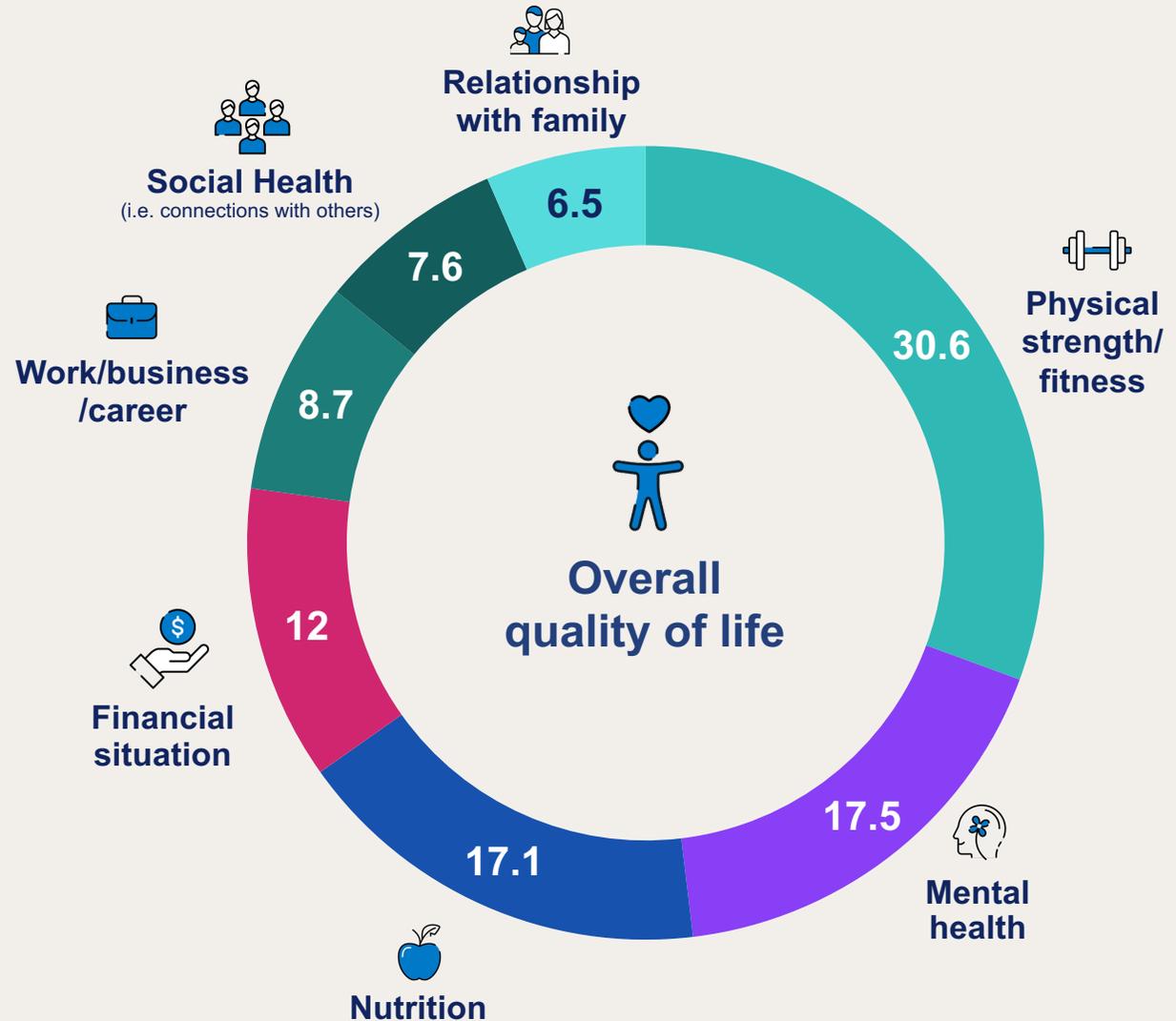


Base: n=1,467 cases used in estimation (cases containing missing values have been excluded). R-squared: 0.51 (51% of the variability in perceived quality of life is explained by the regression model)
 Q.4. How would you rate your overall quality of life right now?/ Q.6. How would you rate the following aspects of your life?

Physical strength/fitness, mental health and nutrition are the strongest drivers of overall health and wellbeing

Key drivers of overall health and wellbeing

Physical fitness is the main driver of perceptions of overall health and wellbeing, above mental health and nutrition.



Base: n=1,467 cases used in estimation (cases containing missing values have been excluded). R-squared: 0.53 (53% of the variability in perceived health and wellbeing is explained by the regression model)

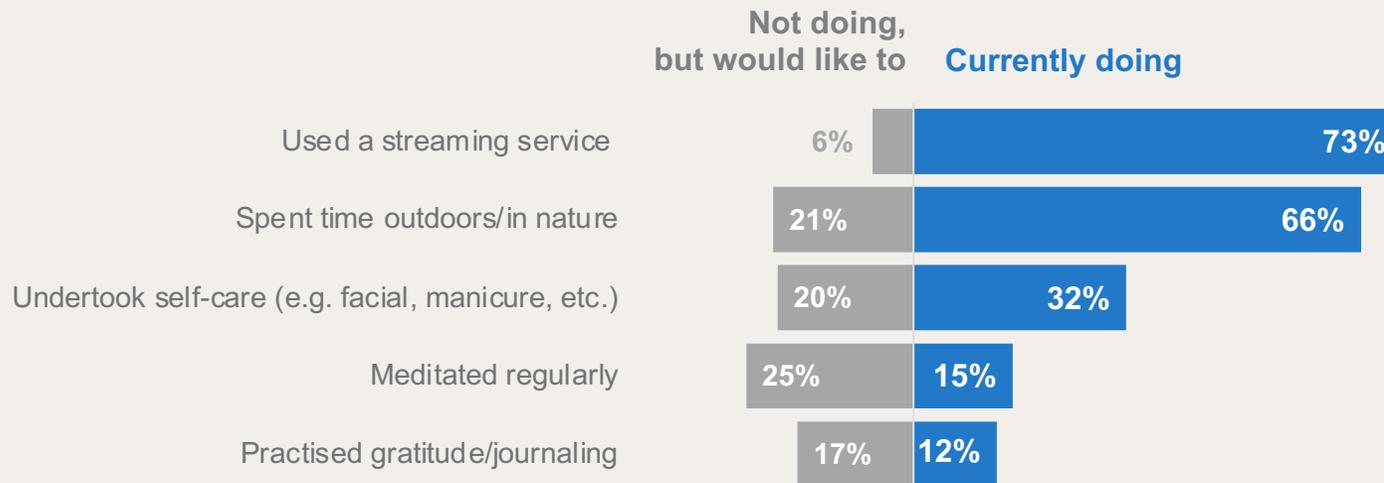
Q.6. How would you rate the following aspects of your life?

Health-related behaviours and intentions



More Australians use a streaming service than spend time outdoors and in nature

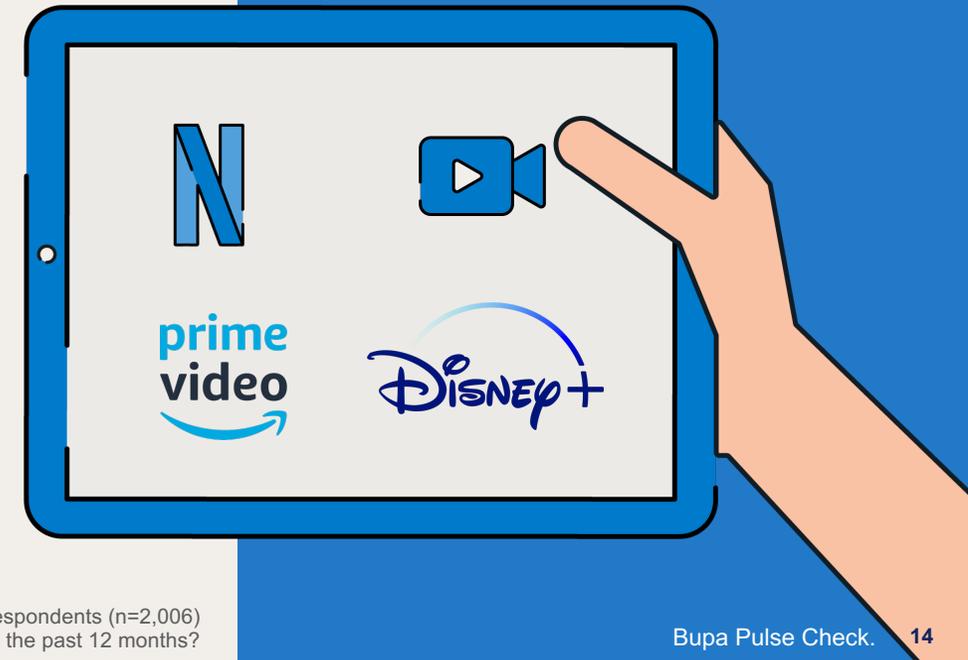
Behaviours and intentions – Self care



Almost three quarters of Australians (73%) indicate that they currently use a streaming service, but only two thirds (66%) spend time outdoors/in nature.

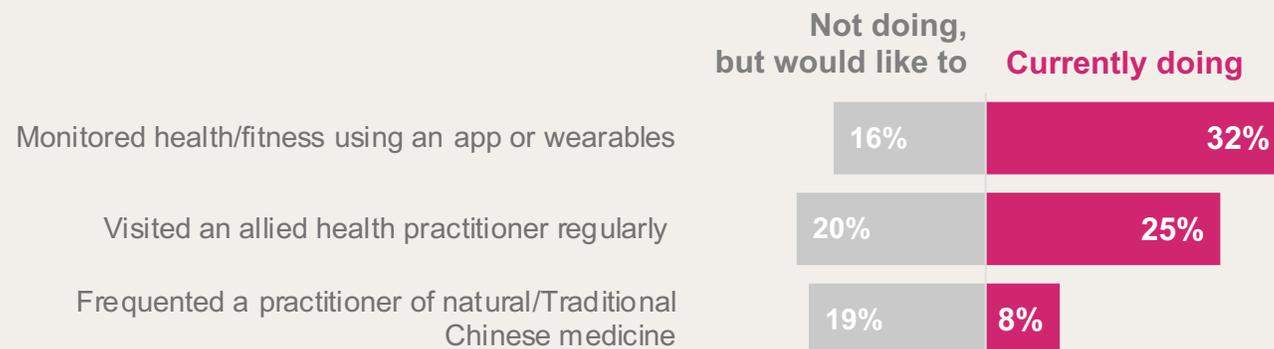
While one in seven currently meditate, a further one in four would like to start. Overall, Australians aged 18-29 have the strongest desire to spend more time outdoors/in nature (26% not doing but would like to), meditate regularly (38%), undertake self-care (28%) and practice gratitude/journaling, where desire drops off with age.

They are also the most likely age group to already be practicing gratitude/journaling (18% currently doing) and undertaking self-care (42%), while older Australians, aged 60-79 are currently the most inclined to spend time outdoors/in nature (71%).



One in three Australian adults (32%) indicate that they monitor their health and fitness using an app/wearable

Behaviours and intentions – Health monitoring and regulation



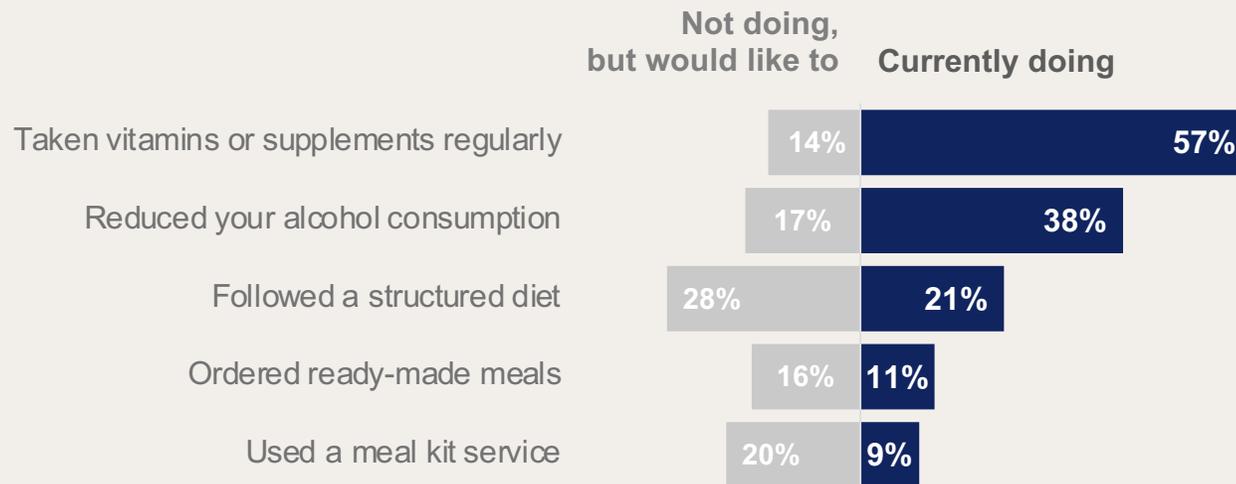
Those that monitor their health and fitness data using an app/wearable are significantly more likely to be aged **under 40** (38%), **female** (34%), **have children under 18** (39%), **have a Bachelor degree or higher** (40%), **work full-time** (40%), **speak a language other than English at home** (39%) and **have a household income of \$100k or more** (42%).

The 8% currently frequenting a practitioner of natural/traditional Chinese medicine are more likely to be **female** (9%), **have children under 18** (11%), **have a post graduate diploma or higher** (11%), **work full/part-time** (10%) and **speak a language other than English at home** (12%).



Almost two in five Australian adults (38%) indicate they are reducing their alcohol consumption

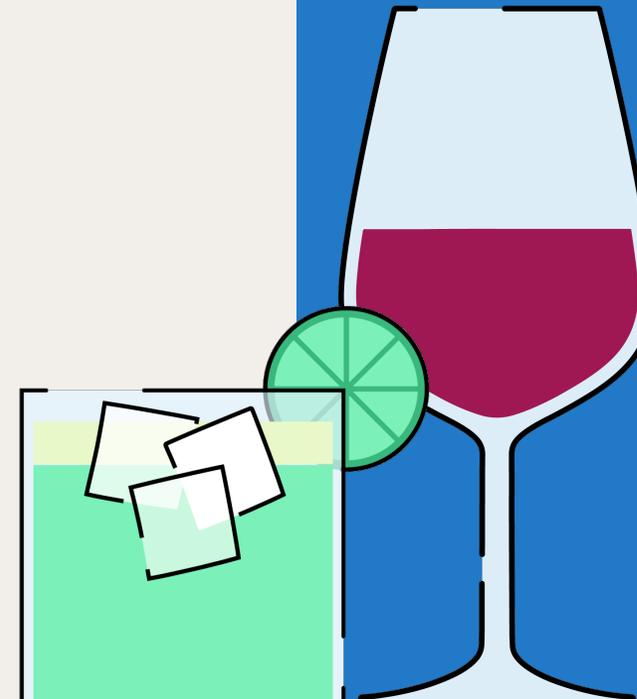
Behaviours and intentions – Nutrition and eating/drinking



Reducing alcohol is common across all age groups but is slightly higher in females (41%).

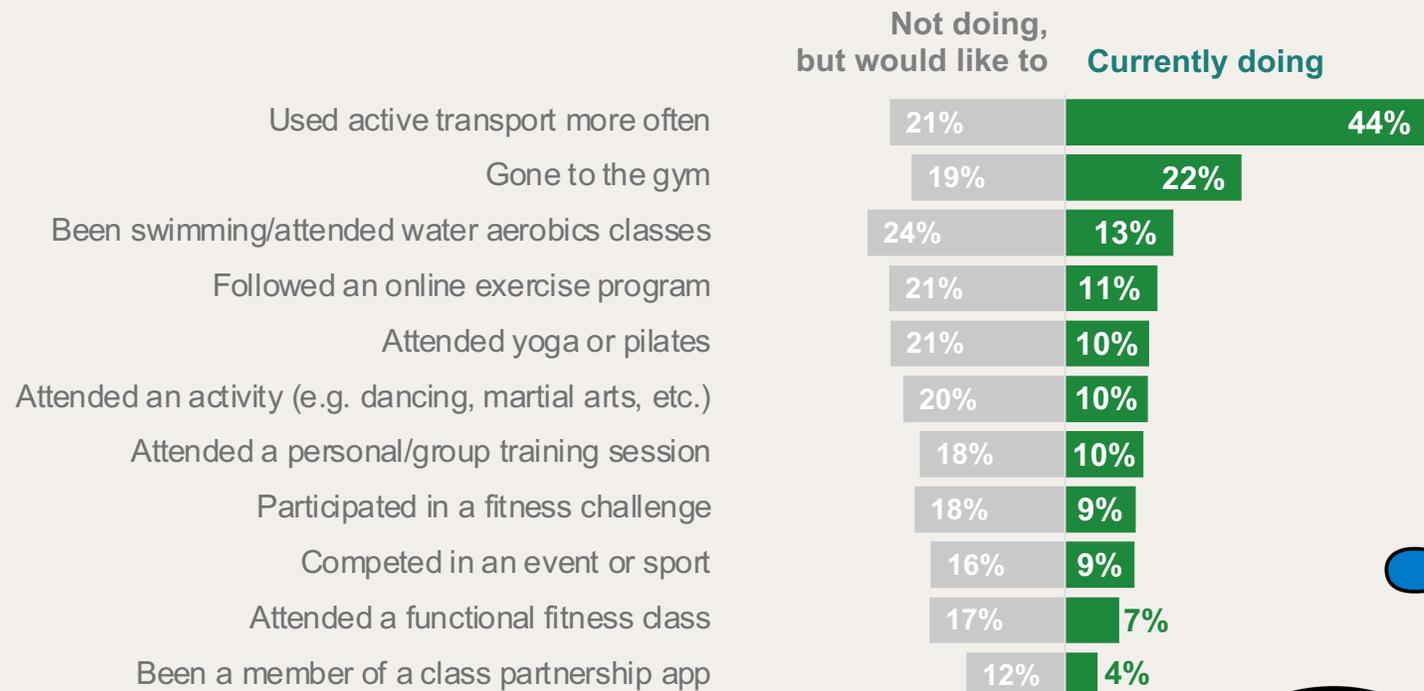
Over half of Australian adults take vitamins or supplements regularly (57%) and one in five (21%) are currently following a structured diet. Those who would like to follow a structured diet are those aged under 50 (36%), reside in a **metropolitan** area (30%), **have children under 18** (38%) and work **full-time** (36%).

There is also a strong interest in ready-made or meal kit services (20% would like to use), despite a relatively small existing market at 9%.



Australians want to be more active, with a growing uptake of active transport modes

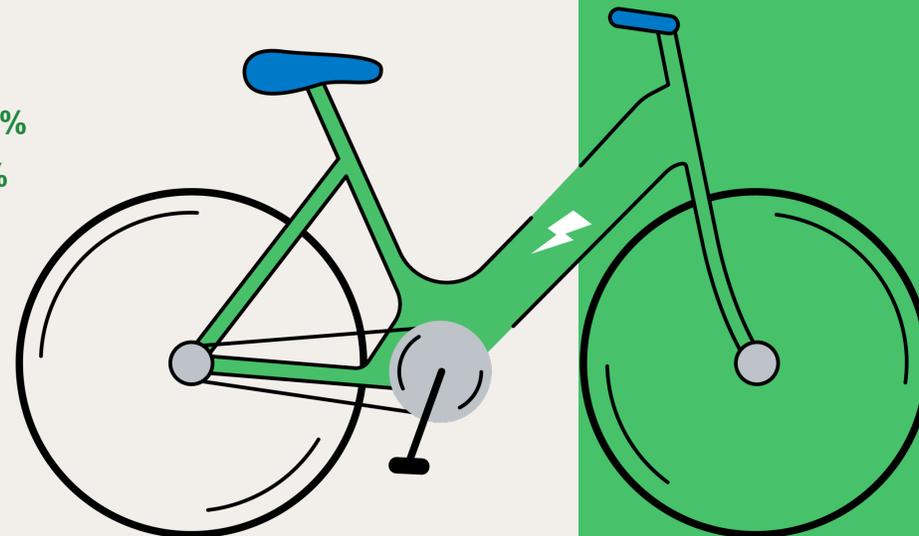
Behaviours and intentions – Fitness activity



Active transport (such as walking, running and cycling) is the top way Australians are getting in their exercise in with 44% indicating they are using active transport more often. This is likely to reflect the cost-effective and accessible nature of these options.

Those using active transport more often are more likely to be male (49%), have children under 18 (48%), obtained a bachelor degree or higher (51%), work full-time (47%) and speak a language other than English at home (51%).

Desire to use active transport more often is highest among Australians aged 18-29 (28%), those with children under 18 (25%), those that work full-time (24%) or study (39%).



Younger Australians look for new ways to stay healthy and fit

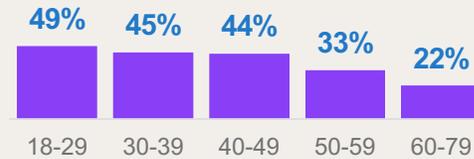
37%



agreed:

“I am someone who likes to explore new trends and try new things in health and wellbeing”

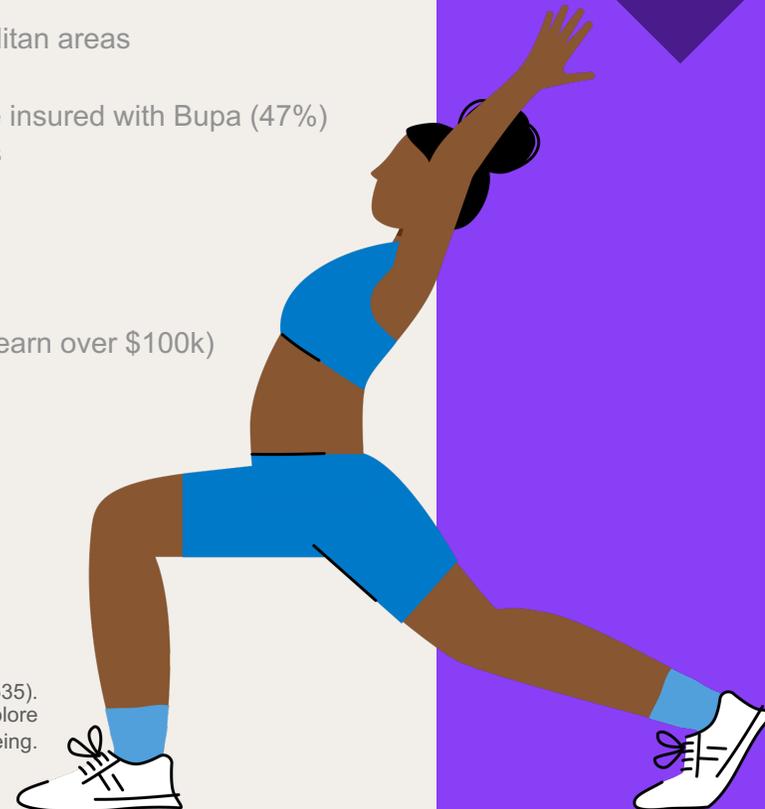
% agree by age



More likely to agree were:

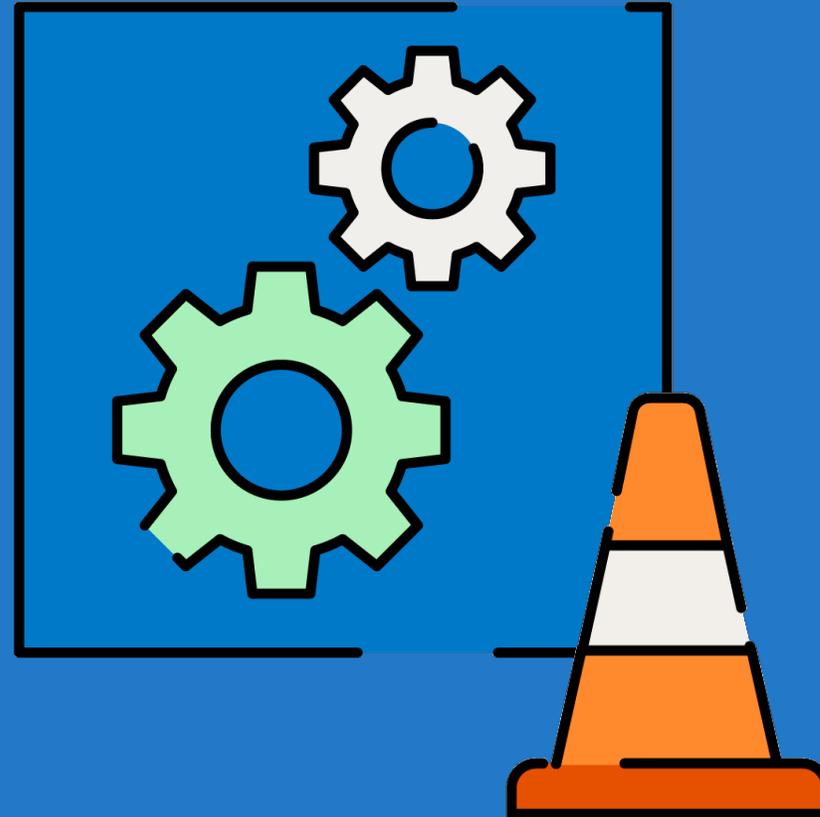
- 46% of those aged under 50
- 39% of those residing in metropolitan areas
- 42% of those residing in Sydney
- 41% have PHI, in particular those insured with Bupa (47%)
- 49% live with friends/housemates
- 47% parents of a child under 18
- 45% bachelor degree or higher
- 47% work full-time
- 41% renters
- 46% higher income households (earn over \$100k)
- 55% speak a language other than English at home

Encouraging young people to invest in, and actively manage, their own health and wellbeing is an important step in addressing current and future healthcare challenges and easing some of the burden on the system.



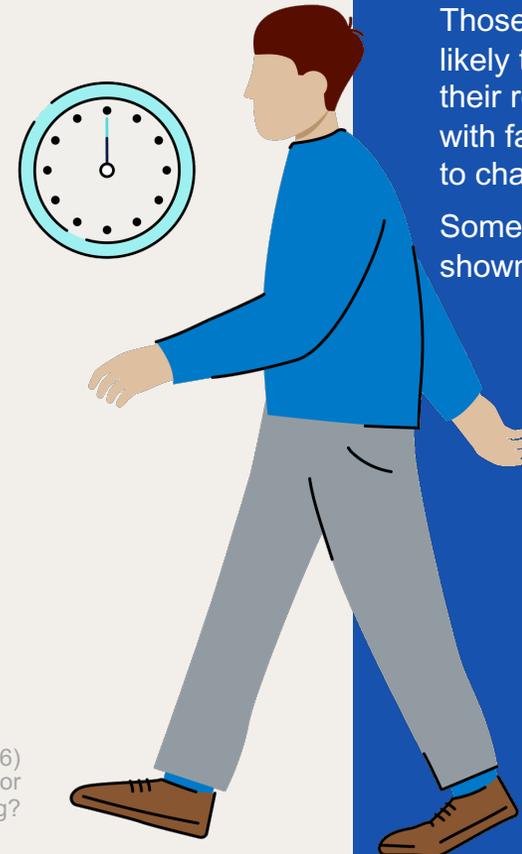
Base: All respondents (n=2,006). 18-29 (n=434), 30-39 (n=365), 40-49 (n=356), 50-59 (n=316), 60-79 (n=535).
Q.13. To what extent do you agree or disagree with the following statements? I am someone who likes to explore new trends and try new things in health and wellbeing.

Drivers and barriers to health and wellbeing



Having a routine is key for one in three Australians to successfully manage their health and wellbeing

What things have worked for you or helped you be successful in managing your health and wellbeing?



When asked what things have helped Australians be successful in managing their health and wellbeing, a third (32%) indicated that building it into their routine was key.

Those aged under 40 are most likely to undertake measures to manage their health and wellbeing.

Females are more inclined to prepare their meals in advance (29% vs. 21% males), find fun/enjoyable fitness alternatives (25% vs. 19%) and monitor their health through app/wearable (19% vs. 15%).

Those residing in **metropolitan** areas are more likely to build health and wellbeing practices into their routine (33% vs. 29% regional), exercise with family or friend (23% vs 19%) and sign up to challenges/events (7% vs. 4%).

Some examples in respondents' own words are shown over the following pages.



“Parking further away from my destination so I can walk. Go for a daily walk with the dogs. Catch up with a friend weekly for a river walk. Meal planning in advance and reducing takeout.”

- Female, 18-29 years

“Walking more often to nearby shops rather than taking the car, preparing healthy meals often, walking and playing with the kids.”

- Male, 30-39 years

“Becoming vegan, eating plant-based whole foods, making more meals at home and having picnics with friends and family. Being in nature more, taking short trips and holidays with spouse and friends. Joining Yoga and Pilates classes, cycling and walking more. Taking the dog to State Forests and beaches.”

- Female, 60-79 years

“Signing up to sports with friends (martial arts and indoor soccer). Not only does it force me to exercise but also to work on my fitness to improve in both sports.”

- Male, 18-29 years

“I get up early probably 4 days a week and get out on a brisk walk for about an hour. I walk to the shops when I can rather than take the car. I keep active around the house and in the garden.”

- Male, 60-79 year old

“When the weather is nice, I try to ride my bicycle or go for a jog and spend more time in my vegetable garden growing healthy food. I find it helpful when I prepare salad ingredients in bulk in advance by shredding and chopping them up, put them in bowls in the fridge. It saves time each day as when I make a salad, I simply take a bit from each bowl that has already been chopped and grated and add a home-made sauce. Also, frozen bananas in a blender with cacao powder with a little liquid makes a delicious non-dairy nice cream.”

- Male, 40-49 years old

“Do not buy junk food to stop being tempted when I have cravings. Stopping surrounding myself with negative people has made me happier. Going for longer walks with my dogs.”

- Male, 18-29 years old



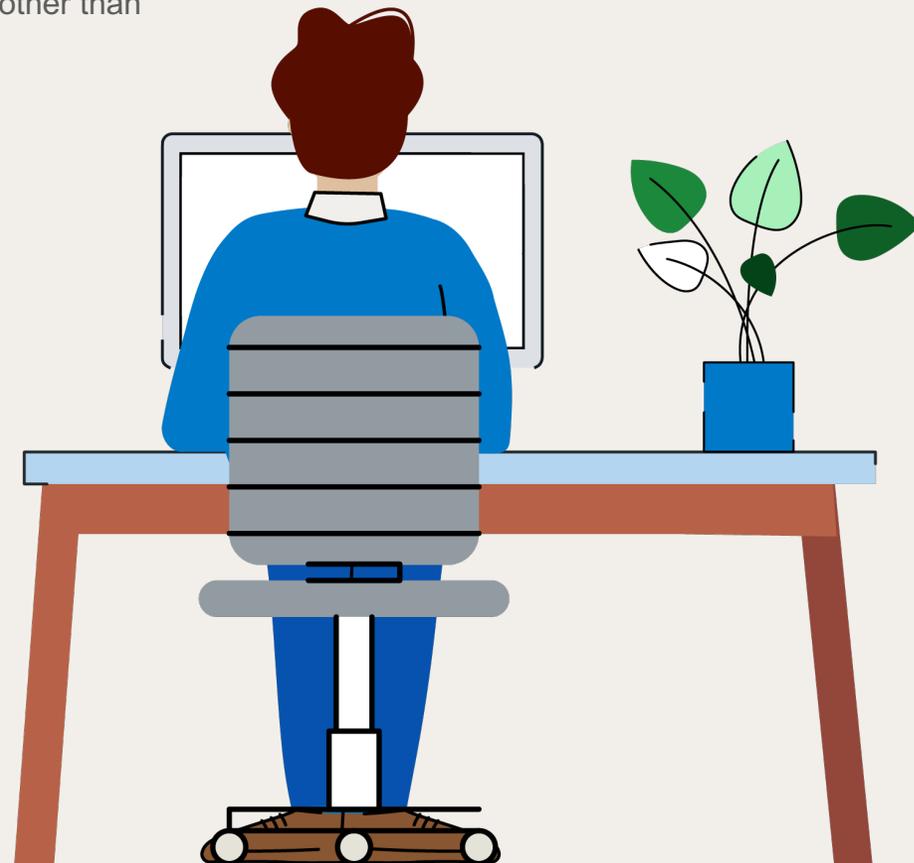
Just under two in five Australians are struggling to manage their health and wellbeing

38%

agreed that they are finding it **difficult to manage** their health and wellbeing

More likely to agree were:

- 46% of those aged under 40
- 44% parent/guardian of a child under 18
- 42% mortgage owners or renters
- 44% speak a language other than English at home



Base: All respondents (n=2,006)

Q.13. To what extent do you agree or disagree with the following statements? I am finding it difficult to manage my health and wellbeing.

Two in five (40%)

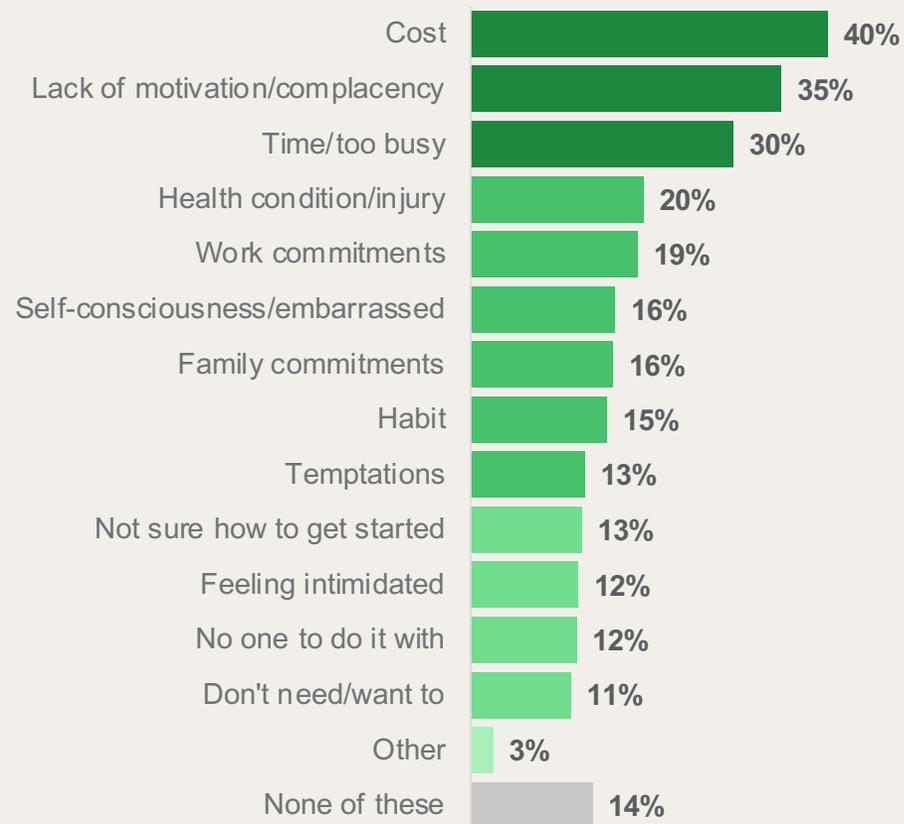
feel costs are the main barrier to maintaining health and wellbeing



Q.9. Over the past 12 months, what have you found are the main hurdles to doing what you would like to do from a health and wellbeing perspective (i.e. things standing in your way)?

Barriers to maintaining health and wellbeing

Base: All respondents (n= 2,006)



This is likely to be exacerbated by rising costs across multiple categories including health. Cost is particularly a barrier among Australians aged under 50 (45%).

In general, **females** see more barriers than males to improving their health and wellbeing. Key barriers for women include cost (45% vs. 35%), motivation (39% vs. 31%), feeling self-conscious/intimidated (20% vs. 13%), family commitments (18% vs. 14%) and being unsure how to start (14% vs. 11%).

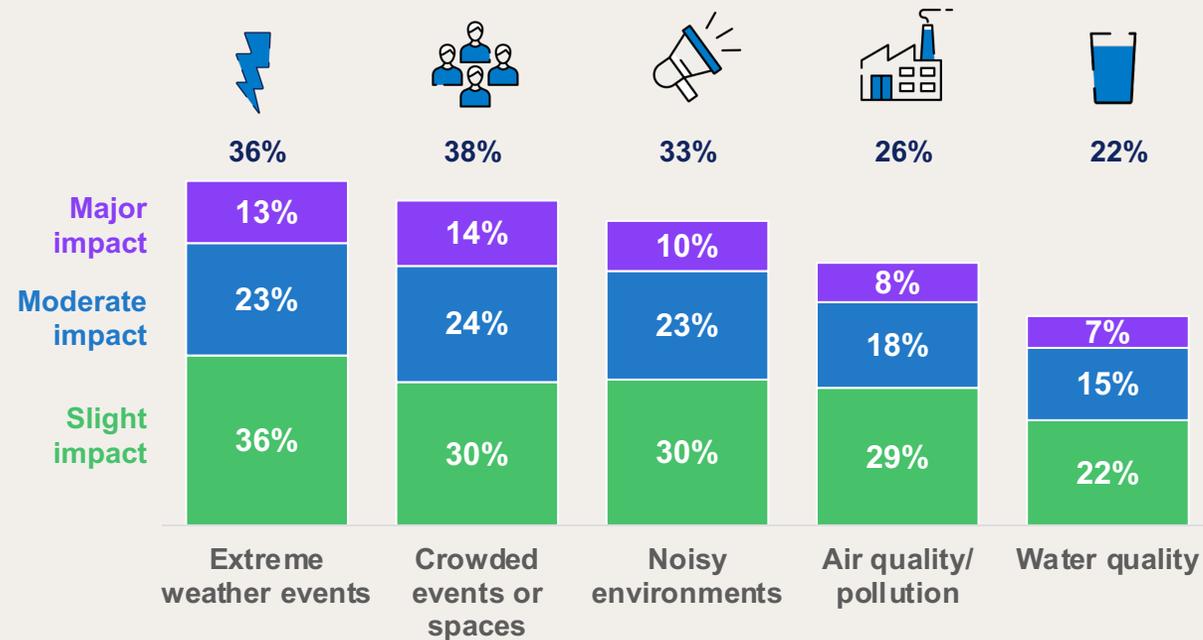
Those residing in **metropolitan** areas are significantly also more likely to see motivation (37% vs. 31%), time (32% vs. 25%), work (21% vs. 15%), feeling intimidated (14% vs. 9%) and being unsure where to begin (14% vs. 10%) as barriers than those residing regionally.

Among the two in five (38%) currently **struggling to maintain their health and wellbeing**, half (50%) felt **cost** was a barrier followed by just under half (45%) who felt **unmotivated/complacent**.

Three in ten (29%) feel the environment has a major impact on their mental/physical health

Impact of environmental aspects on mental and/or physical health

% Major/moderate impact



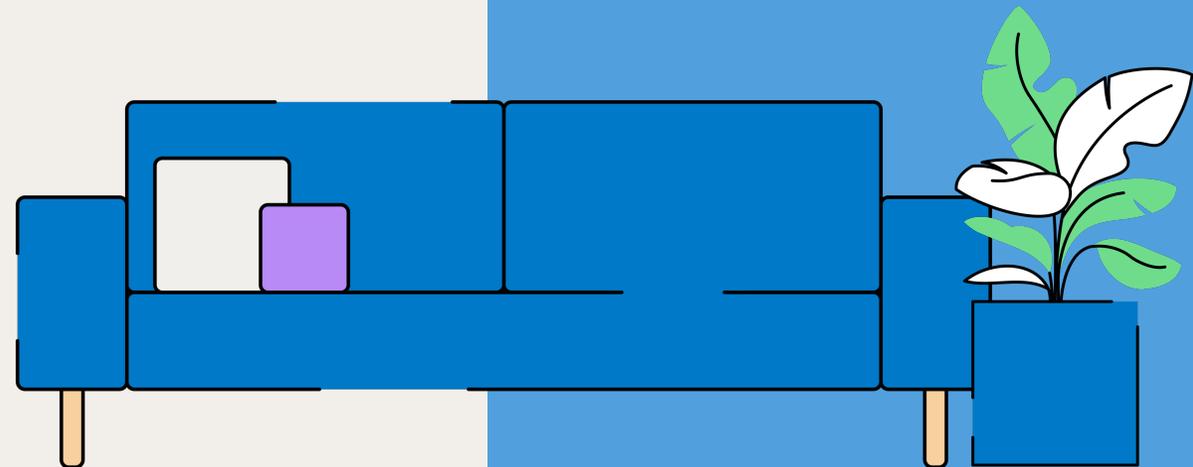
29%
at least one aspect had a major impact

Females (34%), those aged under 40 (33%), renting (34%) and speak a language other than English at home (39%) are most likely to feel that at least one environmental aspect has a major impact on their mental/physical health.

Victorians are significantly more likely to feel that extreme weather events have a major impact on their mental/physical health (17%).

Australians aged 30-39 are most likely to feel that noisy environments (13% major impact), air quality (12%) and water quality (10%) have a major impact on their mental/physical health.

Base: All respondents (n=2,006)
Q.12. To what extent (if any) do you feel the following aspects of the environment currently have an impact on your mental and/or physical health?

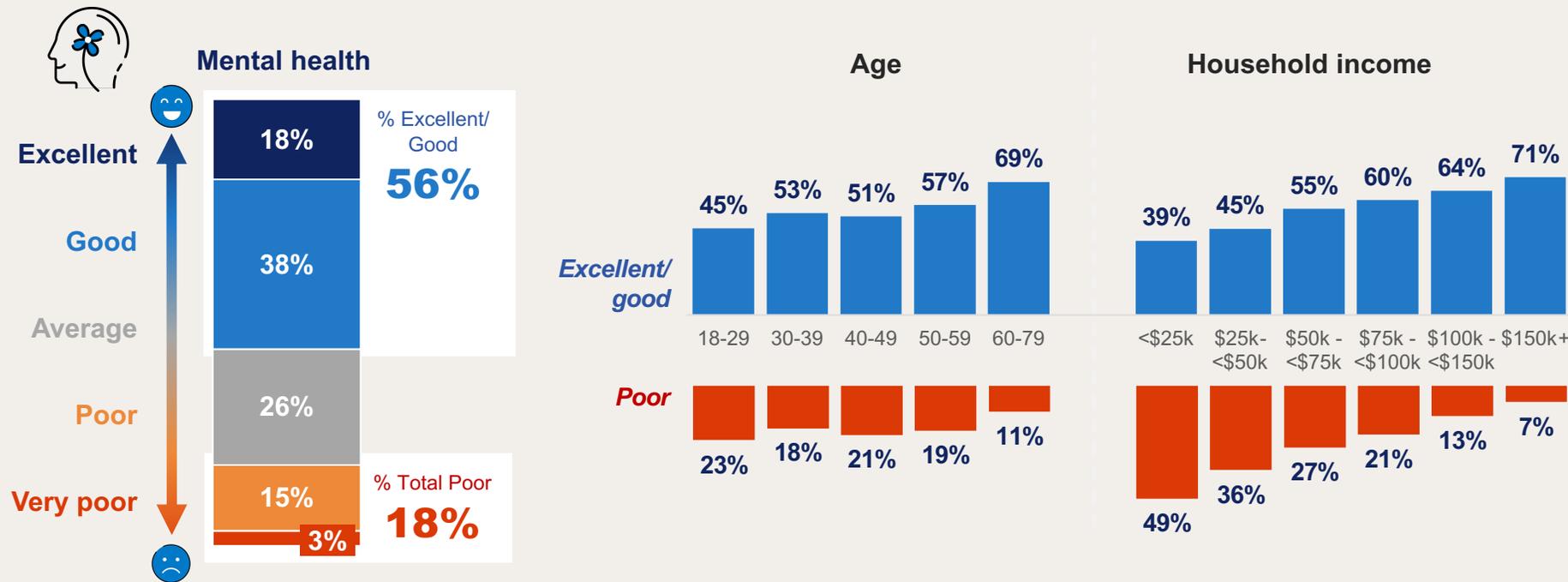


Mental health



Younger Australians suffer most from poor mental health, with mental health outcomes also correlated with household income

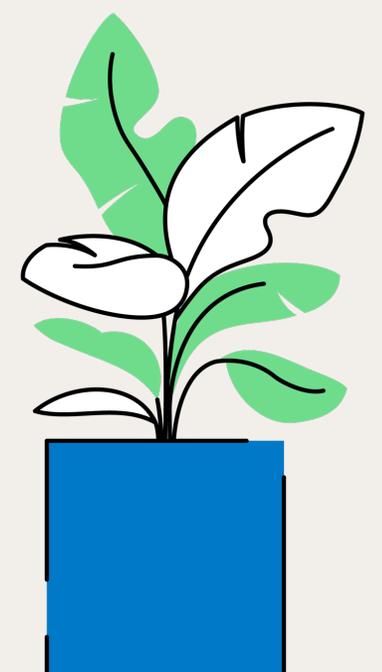
How would you rate the following aspects of your life?



Base: All respondents (n=2,006). 18-29 (n=434), 30-39 (n=365), 40-49 (n=356), 50-59 (n=316), 60-79 (n=535). <\$25k (n=125), \$25k-<\$50k (n=364), \$50k -<\$75k (n=299), \$75k -<\$100k (n=289), \$100k -<\$150k (n=426), \$150k + (n=344). Note: n/a removed
 Q.6. How would you rate the following aspects of your life?

This is in line with recent results from the longitudinal HILDA survey, which found that the average mental health score of young people dropped significantly in 2020.

Females (21% poor vs. 16% males) and those who rent rather than own their home (25%) are also significantly more likely to rate their mental health as poor.



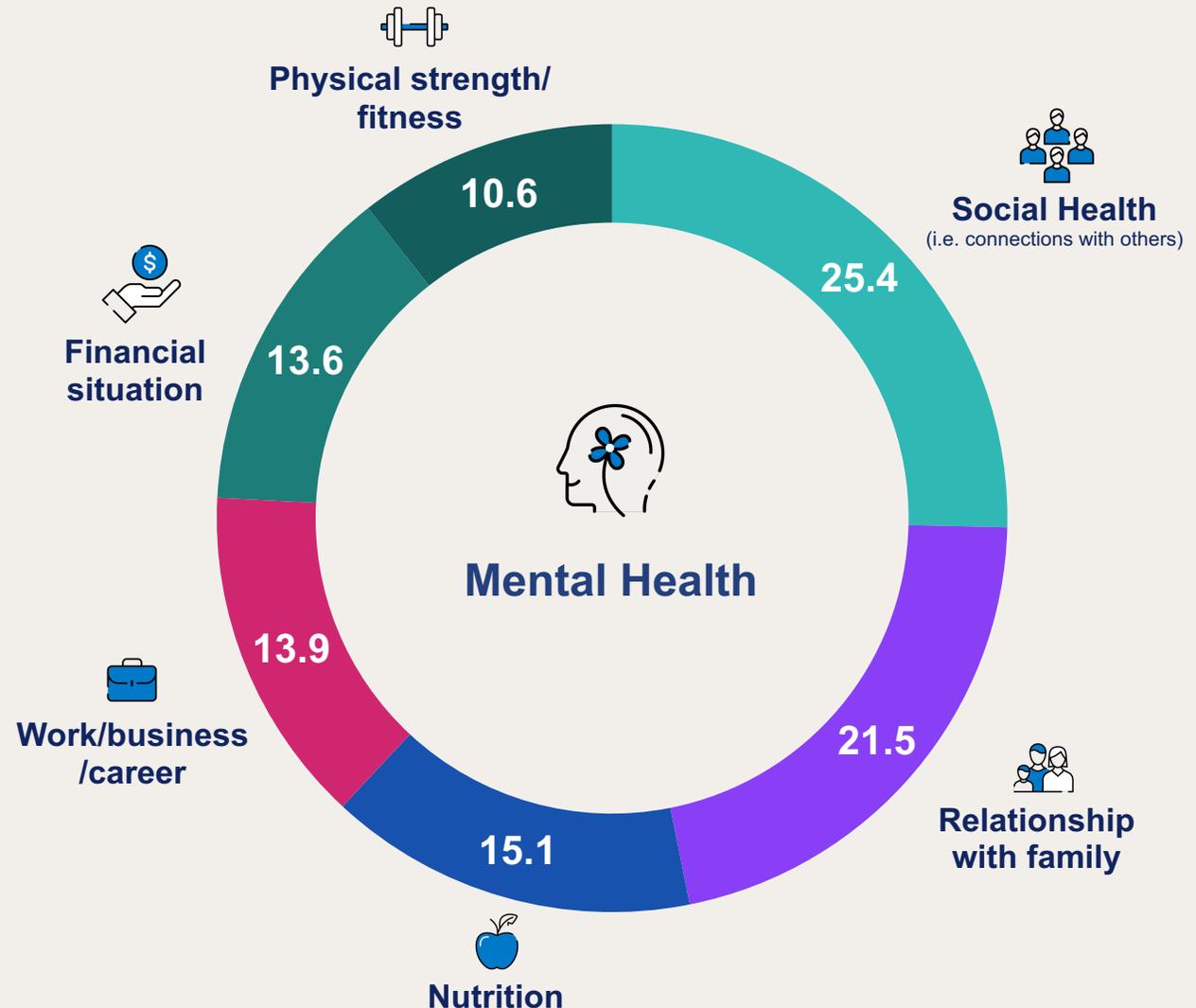
Social connection linked to positive mental health outcomes, across both friend and family relationships

Key drivers of mental health

Social connection to both family and friends is found to be the main driver of positive mental health among Australians.

In particular, among younger Australians social connection with others is by far the biggest driver.

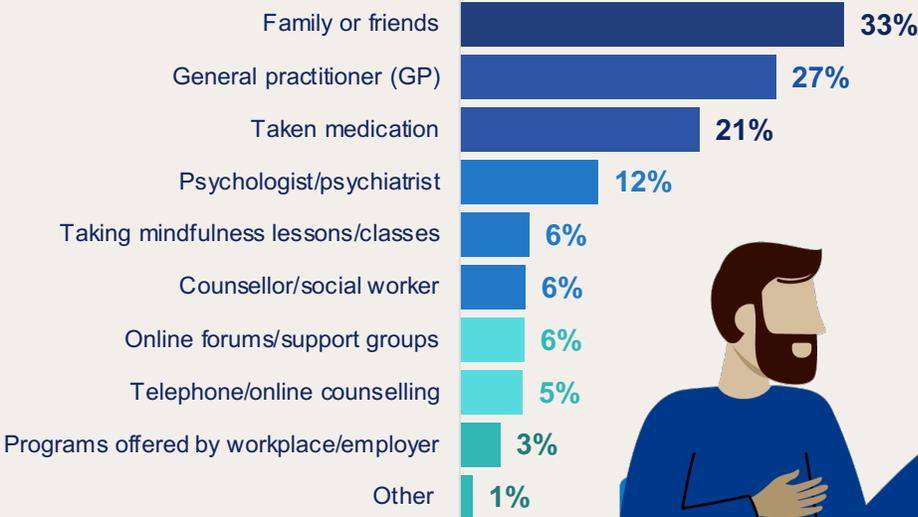
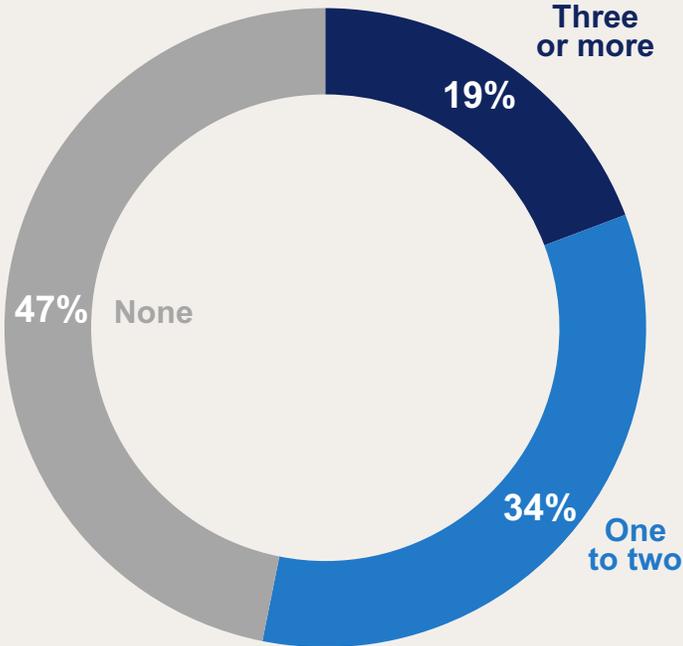
Base: n=1,467 cases used in estimation (cases containing missing values have been excluded). R-squared: 0.49 (49% of the variability in perceptions of own mental health is explained by the regression model)
Q.4. How would you rate your overall quality of life right now?/ Q.6. How would you rate the following aspects of your life?



Over half of all Australians accessed a form of mental health assistance over the last 12 months, with one in three looking to family or friends for support

Have you used any of the following for mental health assistance in the past 12 months?

Number of mental health sources accessed



Two in three (66%) Australians aged 18-39 sought out mental health assistance over the last 12 months, with one in four (26%) accessing three or more services. Family and friends were sought out most as one in three (33%) Australians turned to those around them for support.



Base: All respondents (n=2,006)
 Q.8. Have you used any of the following for mental health assistance in the past 12 months?

Impact of the COVID-19 pandemic



Half of Australians aged under 50 delayed health appointments during the pandemic



43%

agreed that they delayed health appointments due to the pandemic

Base: All respondents (n=2,006)
Q.13. To what extent do you agree or disagree with the following statements? I delayed health appointments (eg: Doctor, physio, dental etc) due to the pandemic.

But despite this, over half felt the pandemic encouraged them to prioritise their health and wellbeing

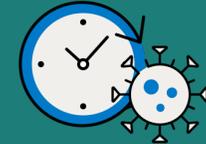


53%

agreed that the pandemic made them prioritise their health and wellbeing over other things

Base: All respondents (n=2,006)
Q.13. To what extent do you agree or disagree with the following statements? The pandemic has made me prioritise my health and wellbeing over other things?

Half of all Australian adults hold concern about the potential impact of future pandemics on their wellbeing



52%

agreed that they are concerned about the impact of future pandemics on my health and wellbeing

Base: All respondents (n=2,006)
Q.13. To what extent do you agree or disagree with the following statements? I am concerned about the impact of future pandemics on my health and wellbeing.

Chronic illness

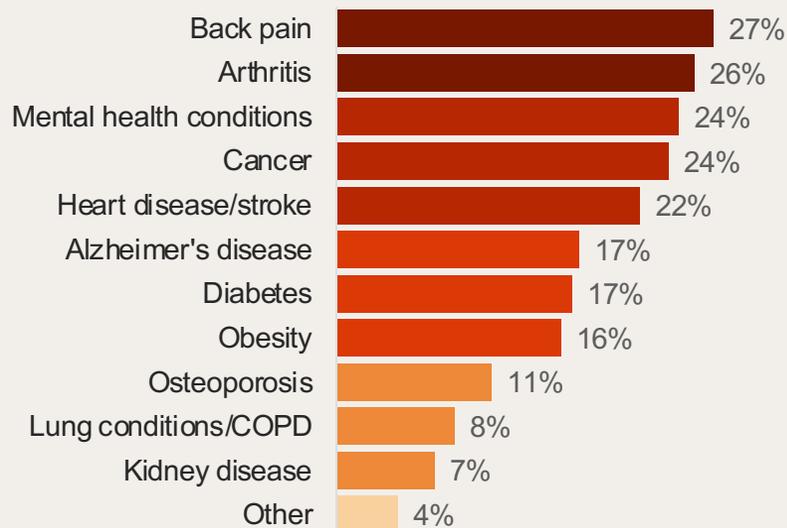


Two in three Australians (68%) are concerned about developing a chronic illness

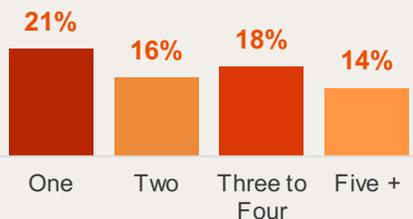
68%

of Australian adults aged 18-79 are concerned about developing a chronic illness

Chronic illnesses concerned about



Number of chronic illnesses concerned about



Base: All respondents (n=2,006)
Q.15. Are you concerned about developing any of the following chronic conditions?

Back pain and arthritis are the top two chronic illnesses Australians are concerned about developing.

Younger Australians are less concerned about developing a chronic illness (56% aged 18-29 concerned about any, 76% aged 40+). Despite older Australians holding more concern about chronic illnesses, mental health concern is significantly higher among those aged 18-29, ranking as their top concern at 30%.

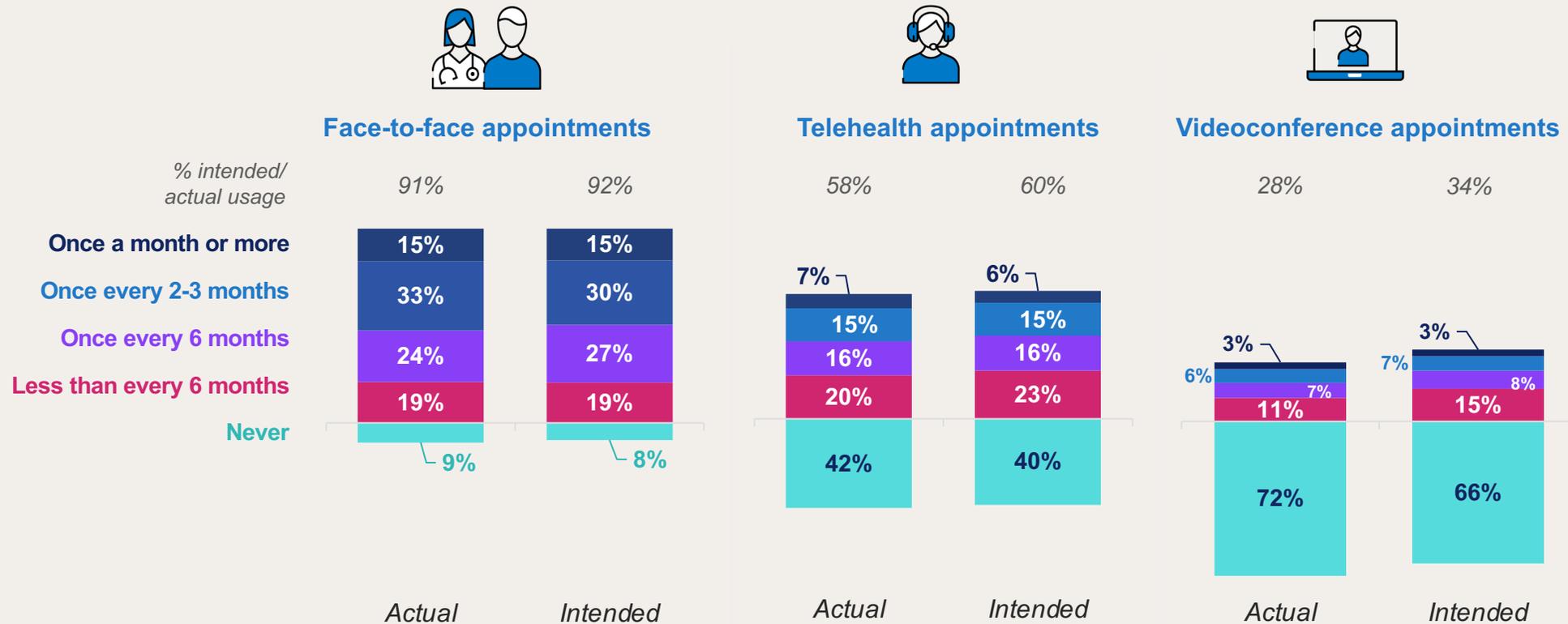


In person vs telehealth appointments



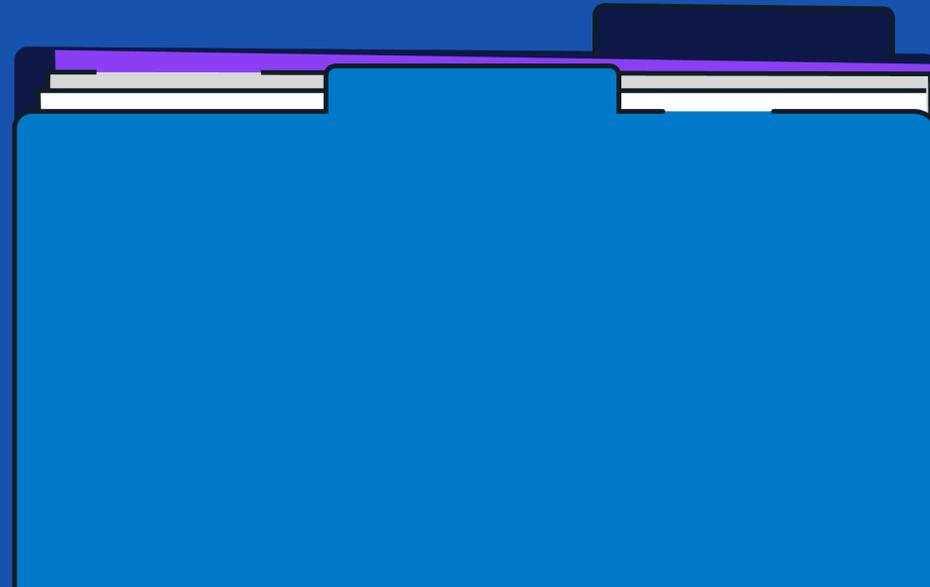
Preference for in-person appointments prevails, however strong desire for telehealth and videoconference maintained

Appointment types used over past 12 months/intend to use over the next 12 months



Base: All respondents (n=2,006)
 Q.22. Over the past 12 months, how often have you used the following services? / Q.23. How often do you expect to use the following services over the next 12 months?

Appendix



Questionnaire



Bupa

Survey type: Online

Project consultants:	Richard Frost, Jacque Norton, Anastasia Spratt
Total number of interviews to be completed:	2,000
Definition of target audience:	Representative sample of Australians
Panel Provider (panel sample only):	TBC
Data to be merged with a previous datafile?	No

Soft quotas to be applied:

	Male	Female	Total
18-29	217	217	434
30-39	180	180	360
40-49	178	178	356
50-59	158	158	316
60+	267	267	534
Total	1,000	1,000	2,000

	Metropolitan	Regional	Total
NSW	412	223	635
VIC	388	125	513
QLD	200	205	405
WA	166	42	208
SA	109	30	139
ACT	36	0	36
NT	12	8	20
TAS	20	24	44
Total	1,343	657	2,000

Introduction – Online

Thank you for taking part in this survey.

This survey is about health and wellbeing and should take no more than 10 minutes to complete.

Please be reassured that this survey is anonymous, and we will never use your individual responses on their own. Quantum is an independent market research company and complies with the Australian Privacy Act 1988 and The Research Society's Code of Professional Behaviour. Our privacy policy can be found [here](#).

Quantum
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Research**Screener (1 min)**

The first few questions are to check if this survey is relevant to you.

ASK ALL

Q.1. How old are you?

INSERT AGE

[TERMINATE IF AGED UNDER 18 OR 80 OR OVER]

ASK ALL

Q.2. What gender do you identify with?

SINGLE RESPONSE

Male 1
 Female 2
 Non-binary 3
 Another gender (please specify): 4

ASK ALL

Q.3. What is your postcode?

[TERMINATE IF NON-AUSTRALIAN POSTCODE]

PROGRAMMER PLEASE CREATE THE BELOW VARIABLES BASED OFF POSTCODE:

- State/territory
- Region (metropolitan/regional)

Quantum
Market
Research**Health and wellbeing (6 mins)**

Thank you. We'd now like to ask you some questions about how you feel about your life and sense of wellbeing.

ASK ALL

Q.4. How would you rate your overall quality of life right now?

SINGLE RESPONSE

Very poor 1
 Poor 2
 Average 3
 Good 4
 Excellent 5

ASK ALL

Q.5. How do you feel your overall quality of life has changed over the past 12 months? Is it...

SINGLE RESPONSE

A lot better 1
 A little better 2
 No change 3
 A little worse 4
 A lot worse 5

ASK ALL

Q.6. How would you rate the following aspects of your life?

SINGLE RESPONSE PER ROW, RANDOMISE ROWS

		Very poor	Poor	Average	Good	Excellent	Not applicable
1	Overall health and wellbeing [KEEP AT TOP]	1	2	3	4	5	6
2	Nutrition (i.e. how well you eat)	1	2	3	4	5	6
3	Physical strength/fitness	1	2	3	4	5	6
4	Mental health	1	2	3	4	5	6
5	Social health (i.e. connections with others)	1	2	3	4	5	6
6	Relationship with family	1	2	3	4	5	6
7	Work/business/career	1	2	3	4	5	6
8	Financial situation	1	2	3	4	5	6

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Market
Research

ASK ALL

Q.7. Which of the following (if any) do you currently do, or have you done in the past 12 months?

SINGLE RESPONSE PER ROW, RANDOMISE ROWS

		Currently doing	Not currently doing, but would like to do	Neither
1	Followed an online exercise program	1	2	3
2	Gone to the gym	1	2	3
3	Attended a <u>functional</u> fitness class (e.g. F45)	1	2	3
4	Attended a personal/group training session	1	2	3
5	Been a member of a class partnership app (e.g. ClassPass)	1	2	3
6	Attended yoga or pilates	1	2	3
7	Been swimming/attended water aerobics classes	1	2	3
8	Attended an activity (e.g. dancing, martial arts, etc.)	1	2	3
9	Participated in a fitness challenge	1	2	3
10	Competed in an event or sport (e.g. triathlon, fun run, etc.)	1	2	3
11	Used active transport more often (e.g. cycling, walking, running, etc.)	1	2	3
12	Reduced your alcohol consumption	1	2	3
13	Taken vitamins or supplements regularly	1	2	3
14	Meditated regularly	1	2	3
15	Followed a structured diet	1	2	3
16	Visited a practitioner of natural medicines/Traditional Chinese medicine regularly (e.g. acupuncture, herbal therapy)	1	2	3
17	Visited an allied health practitioner regularly (e.g. physiotherapist)	1	2	3
18	Monitored my health/fitness data using an app or wearables	1	2	3
19	Used a meal kit service (e.g. Hello Fresh, Marley Spoon, etc.)	1	2	3
20	Ordered ready-made meals (e.g. YouFoodz)	1	2	3
21	Undertook self-care (e.g. facial, manicure, etc.)	1	2	3
22	Used a streaming service (e.g. Netflix, Stan, Disney, etc.)	1	2	3
23	Spent time outdoors/in nature	1	2	3
24	Practised gratitude/journaling	1	2	3

ASK ALL

Q.8. Have you used any of the following for mental health assistance in the past 12 months?

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MULTIPLE RESPONSE, RANDOMISE ORDER

Family or friends	1
General practitioner (GP)	2
Psychologist/psychiatrist	3
Taken medication	4
Counsellor/social worker	5
Telephone/online counselling (e.g. Lifeline, Headspace, Nurse on Call, etc.) ...	6
Online forums/support groups	7
Programs offered by workplace/employer	8
Taking mindfulness lessons/classes	9
Other (please specify)	10
None	11

ASK ALL

Q.9. Over the past 12 months, what have you found are the main hurdles to doing what you would like to do from a health and wellbeing perspective (i.e. things standing in your way)?

MULTIPLE RESPONSE, RANDOMISE ORDER

Time/too busy	1
Family commitments	2
Work commitments	3
Cost	4
Not sure how to get started	5
Lack of motivation/complacency	6
Self-consciousness/embarrassed	7
Feeling intimidated	8
No one to do it with	9
Health condition/injury	10
Don't need/want to	11
Temptations	12
Habit	13
Other (please specify)	14
None of these	15

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ASK ALL

Q.10. Over the past 12 months, what things have worked for you or helped you be successful in managing your health and wellbeing?

MULTIPLE RESPONSE, RANDOMISE ORDER

Exercising with a friend/family member	1
Having fitness goals	2
Monitoring my health/fitness data using an app or wearable	3
Signing up to a challenge/event	4
Building it into my routine	5
Preparing meals in advance	6
Rewarded myself	7
Finding fun/enjoyable fitness alternatives	8
Removing temptations	9
Other (please specify)	10
None of these	11
I don't feel I have been successful in managing my health and wellbeing	12

[ANCHOR]

ASK ALL

Q.11. What small steps or habits (if any) have you put into place over the past 12 months to manage your health and wellbeing? For example, getting off public transport a stop earlier, preparing meals for the week, exercising with a friend, etc.

OPEN-END

ASK ALL

Q.12. To what extent (if any) do you feel the following aspects of the environment currently have an impact on your mental and/or physical health?

[SELECT ONE ANSWER PER ROW, RANDOMISE STATEMENTS]

		No impact	A slight impact	A moderate impact	A major impact
1	Air quality/pollution	1	2	3	4
2	Water quality	1	2	3	4
3	Extreme weather events	1	2	3	4
4	Crowded events or spaces	1	2	3	4
5	Noisy environments	1	2	3	4

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ASK ALL

Q.13. To what extent do you agree or disagree with the following statements?

[SELECT ONE ANSWER PER ROW, RANDOMISE STATEMENTS]

		Strongly disagree					Strongly agree
1	The pandemic has made me prioritise my health and wellbeing over other things	1	2	3	4	5	6
2	I delayed health appointments (e.g. doctor, physio, dental, etc.,) due to the pandemic	1	2	3	4	5	6
3	I am someone who likes to explore new trends and try new things in health and wellbeing	1	2	3	4	5	6
4	I am finding it difficult to manage my health and wellbeing	1	2	3	4	5	6
5	I am concerned about the impact of future pandemics on my health and wellbeing	1	2	3	4	5	6

ASK ALL

Q.14. Do you have a disability or chronic/long-term health condition?

MULTIPLE RESPONSE

Yes - disability 1
Yes – long-term health condition 2
No 3
Prefer not to answer 4

ASK ALL

Q.15. Are you concerned about developing any of the following chronic conditions?

MULTIPLE RESPONSE

Alzheimer's disease 1
Arthritis 2
Back pain 3
Lung conditions/chronic obstructive pulmonary disease (COPD) 4
Cancer 5
Diabetes 6
Heart disease/stroke 7
Kidney disease 8
Mental health conditions 9

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Obesity 10
Osteoporosis 11
Other (please specify) 12
None of these 13

ASK ALL

Q.16. Predictive medicine is a branch of medicine that aims to identify patients at risk of developing a disease, thereby enabling either prevention or early treatment of that disease.

Before today, had you heard of predictive medicine?

SINGLE RESPONSE

Yes – only heard of it 1
Yes – heard of it and looked into it 2
Yes – heard of it and used a predictive medicine service 3
No 4

ASK ALL

Q.17. How likely would you be to consider predictive medicine (a service that identifies if you were at risk of developing a disease and prescribe prevention or early treatment) in the future?

SINGLE RESPONSE

Not at all likely 1
Not very likely 2
Somewhat likely 3
Very likely 4
Don't know 5

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Private Health Insurance (2 mins)

Now some questions about private health insurance.

ASK ALL

Q.18. Do you have private health insurance?

SINGLE RESPONSE

Yes - Hospital only 1
Yes - Hospital and Extras 2
Yes - Extras only 3
No, but I am considering taking out private health insurance in the next 12 months 4
No, and I am not considering getting private health insurance 5

ASK IF Q.18=1-3 (HAVE PHI)

Q.19. Who are you insured with?

MULTIPLE RESPONSE, RANDOMISE

Medibank 1
Bupa 2
HCF 3
nib 4
HBF 5
Australian Unity 6
Teachers Health 7
GMHBA 8
Defence Health 9
CBHS 10
ahm 11
Other (please specify) 12
Don't know 13

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ASK Q.18=1-3 (HAVE PH)

Q.20. Which of the following extras do you have as part of your cover?

MULTIPLE RESPONSE, RANDOMISE

General dental	1
Major dental	2
Orthodontic	3
Endodontic	4
Optical	5
Physiotherapy	6
Remedial massage	7
Chiropractic	8
Podiatry	9
Psychology	10
Non-PBS pharmaceuticals	11
Lifestyle (e.g. programs for quitting smoking, fitness classes, gym memberships or weight management courses)	12
Eye therapy	13
Occupational therapy	14
Speech therapy	15
Hearing aids	16
Dietician services	17
Health aids and appliances	18
Ambulance	19
Other (please specify)	21
Don't know	20

[ANCHOR]

ASK ALL

Q.21. Below are some areas of health insurance that *could potentially* be offered by an insurer. Which of the following (if any) would you seriously consider taking up, or switching providers for?

MULTIPLE RESPONSE, RANDOMISE

Gym memberships	1
Fitness watches/devices	2
Wellness (yoga, meditation)	3
Cosmetic injectables	4
Mental health coaching	5
Weight loss – diet, <u>meal</u> and exercise plans	6
Specialist appointments not in a hospital (drug and alcohol counselling)	7
General practitioner (GP) visits	8

Skin clinic/skin cancer checks 9
None of these 10

ASK ALL

Q.22. Over the past 12 months, how often have you used the following services?

SINGLE RESPONSE PER ROW, RANDOMISE ROWS

		Once a month or more	Once every 2-3 months	Once every 6 months	Less than every 6 months	Never
1	Telehealth appointments (i.e. phone appointments with health professionals)	1	2	3	4	5
2	Videoconference appointments	1	2	3	4	5
3	Face-to-face appointments	1	2	3	4	5

ASK ALL

Q.23. How often do you expect to use the following services over the next 12 months?

SINGLE RESPONSE PER ROW, RANDOMISE ROWS

		Once a month or more	Once every 2-3 months	Once every 6 months	Less than every 6 months	Never
1	Telehealth appointments (i.e. phone appointments with health professionals)	1	2	3	4	5
2	Videoconference appointments	1	2	3	4	5
3	Face-to-face appointments	1	2	3	4	5

ASK ALL – VALIDATION QUESTION

Q.24. To check you have been completing the survey thoughtfully, please indicate whether each of the following is correct for you.

Please select one response per row

	Yes it's correct	No it's incorrect
Age: 25	<input type="radio"/>	<input type="radio"/>
Gender: Female	<input type="radio"/>	<input type="radio"/>
Postcode: 3682	<input type="radio"/>	<input type="radio"/>

PROGRAMMER: TERMINATE IF RESPONSE IS INCORRECT

Classification (1 min)

And finally, just a couple more questions about you, so that we can understand how different people have answered these questions. As this is market research, it is carried out in compliance with the Privacy Act 1988 and the information you provided will be used only for research purposes.

ASK ALL

Q.25. Which of the following best describes your household?

SINGLE RESPONSE

I live on my own	1
I live with friends/housemates	2
I live with a partner/spouse, no children	3
I live in a family household - youngest child is aged 5 years or under	4
I live in a family household - youngest child is aged 6-12 years	5
I live in a family household - youngest child is aged 13-18 years	6
I live in a family household - youngest person is aged over 18 years	7
Other (please specify)	8
Prefer not to answer	9

ASK ALL

Q.26. Are you the parent or guardian of any children aged under 18 years?

SINGLE RESPONSE

Yes	1
No	2
Prefer not to answer	3

ASK ALL

Q.27. What is the highest level of education you have completed?

SINGLE RESPONSE

Primary school	1
Secondary school	2
Trade qualification	3
TAFE / pre-graduate diploma / certificate	4
Bachelor degree	5
Postgraduate diploma / certificate	6
Masters / Doctorate or above	7

Prefer not to answer8

ASK ALL

Q.28. What is your current work situation?

SINGLE RESPONSE

Full time work1
Part time/casual work.....2
Self-employed3
Retired.....4
Unemployed.....5
On disability / workers compensation benefits and not working.....6
Home duties7
Student.....8
Volunteer9
Other (please specify):10
Prefer not to answer11

ASK ALL

Q.29. Thinking of the home you live in, do you...?

SINGLE RESPONSE

Own your home outright.....1
Own your home, paying off a mortgage2
Pay rent for public / government housing3
Pay rent for private housing.....4
Live with family / friends and do not pay rent5
Other situation (please specify):6
Prefer not to answer7

ASK ALL

Q.30. What is your current annual household income, before tax?

SINGLE RESPONSE

Less than \$25,000.....1
\$25,000-\$49,9992
\$50,000-\$74,9993
\$75,000-\$99,9994
\$100,000-\$124,9995
\$125,000-\$149,9996
\$150,000-\$174,9997
\$175,000-\$199,9998
\$200,000 or more.....9
Not sure.....10
Prefer not to answer11

ASK ALL

Q.31. Do you speak a language other than English at home?

SINGLE RESPONSE

Yes1
No2
Prefer not to answer3

Online thanks

End with thanks (all):

Thank you for assisting us today. Your response to this questionnaire will be kept strictly confidential and will be used only for research purposes. If you have any queries or concerns, please contact us on surveys@qmr.com.au

All data and information collected from the survey will be stored appropriately and in accordance with the Australian Privacy Act 1988 and the New Zealand Privacy Act 2020. Our Privacy policy can be found [here](#).

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