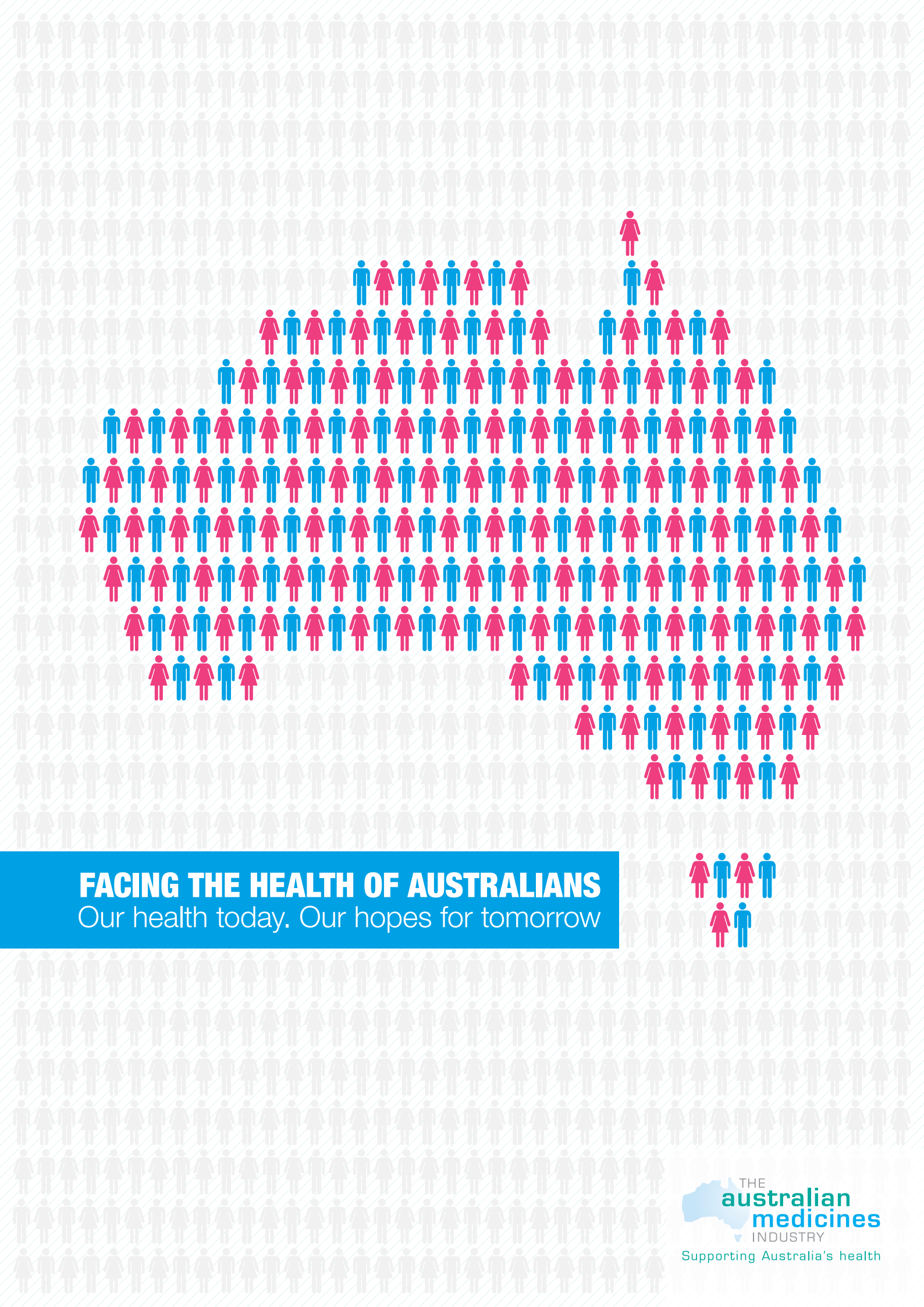




FACING THE HEALTH OF AUSTRALIANS

Our health today. Our hopes for tomorrow

THE AUSTRALIAN MEDICINES INDUSTRY MAKES THE MEDICINES AND VACCINES THAT SAVE LIVES, REDUCE PAIN AND PREVENT DISEASE. WE INVEST \$1 BILLION A YEAR IN R&D AND EXPORT \$4 BILLION WORTH OF MEDICINES, MORE THAN THE CAR AND WINE INDUSTRIES. THE AUSTRALIAN MEDICINES INDUSTRY EMPLOYS OVER 13,000 AUSTRALIANS, EACH CONTRIBUTING TO THE HEALTH AND WEALTH OF THE NATION.

Find out more about The Australian Medicines Industry at

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March 2013

CONTENTS

Foreword	5	Australia's greatest health concerns	20
Who we spoke with	6	Accidents, injury and stress:	
What we asked	6	our biggest family health concerns	20
National Health Priority Areas	6	Obesity tops concerns	
Australians and health: A bundle of contradictions	7	for the younger generation	21
A snapshot of Australia's health, right now	8	National Health Priority Area:	
Nearly a quarter of Aussies have a		Cardiovascular health	22
medical condition affecting their daily life	8	Matters of the heart	22
We're eating better – yet moving less	9	A spotlight on cardiovascular health	22
National Health Priority Areas:		A pivotal place in research and development	22
Mental health and dementia	10	National Health Priority Area: Arthritis	23
Dementia/Alzheimer's disease	10	Arthritis and musculoskeletal conditions	23
Dementia threat fuels concerns		More than 50 medicines approved	23
for our parents' future	10	Prevention and treatment:	
Depression and stress	11	beyond the cutting edge	24
When Australians get sick...	12	The role of medicines and vaccines	
...we see our doctor, but delay making the visit	12	in disease prevention	24
Only as directed	13	Support for vaccines rides high	24
Doctors in the dark on supplement use	13	What's on the horizon?	25
Eye health insights	13	National Health Priority Area: Asthma	26
National Health Priority Area:		National Health Priority Area:	
Cancer control	14	Injury prevention and control	27
More diagnoses, yet fewer deaths	14	A NATION DIVIDED: The gender divide	28
Cancer: Australians' universal health concern	14	The gender divide – a stark contrast	28
National Health Priority Areas:		A NATION DIVIDED: The generational divide	29
Diabetes and obesity	16	A NATION DIVIDED: The geographic divide	30
Diabetes: Australia's rising epidemic	16	The state of play: a complex picture	30
Expanding waistlines leading		A NATION DIVIDED: The rural/urban divide	32
to ballooning health crises	17	Almost half of regional Australians	
Prescription medicines:		aren't exercising	32
an adjunct to diet and exercise	17	Where to now for Australia's health?	34
Lifting the lid on the obesity-diabetes 'disconnect'	18	The Australian Medicines Industry	35
		References	36
		The Australian Medicines Industry	
		– member companies	37



FOREWORD

By any standards, most Australians are blessed with the potential for good health. With an abundance of fresh produce, a relatively clean environment and access to world-class medical care and medicines, most of us enjoy a good life-expectancy and a high standard of living.

Yet Australians are increasingly falling victim to the by-products of an affluent lifestyle. Unhealthy choices such as eating poorly and exercising less are fuelling a dramatic rise in obesity and serious 'spin-off' conditions like type 2 diabetes. Coupled with the fact that Australia continues to have an ever increasing ageing population, our commitment to the health of the nation has never been more important.

In taking the nation's collective pulse on health-related attitudes and behaviours, *Facing the Health of Australians* confirms that while a lot of progress has been made, things like increasing chronic disease associated with an affluent lifestyle are compromising Australians' health and creating a further burden on individuals and society. This creates substantial flow-on effects for the community, including lost productivity, increasing hospitalisations and more pressure on the public healthcare dollar.

While the onus lies with individual Australians to adopt a healthier lifestyle, the role of prescription medicines and vaccines in supporting this effort has never been more important.

Facing the Health of Australians reveals the views, attitudes and perceptions Australians have about their own current health status and that of their families as well, and highlights areas of concern. Expert commentary throughout reveals how we're dealing with these concerns and hopes for the future.

The Australian Medicines Industry is committed to supporting the health and wellbeing of Australians, addressing specific issues related to health and driving an effective response. Consciously or not, our health affects every facet of our lives, and while illness and chronic disease are still a reality, The Australian Medicines Industry continues to work tirelessly to help better understand, treat and ultimately beat major health conditions facing Australians.

I hope you find *Facing the Health of Australians* a compelling and valuable report.



Dr Brendan Shaw

Chief Executive, Medicines Australia



WHO WE SPOKE WITH



This report is based on the results of an online survey of over 5,000 Australians aged 32–66 which was conducted in October 2012 by research company, Pure Profile.

Just over 1/2 were female



61% were married



81% had children...



...more than 1/2 of whom were over 18



More than 2/3 were in full-time, part-time or casual work



Just over half of all respondents were female and almost 61 per cent were married, while 81 per cent had children; more than half of whom were over 18. More than two-thirds of participants were in full-time, part-time or casual work.

49% of respondents belonged to 'Generation X' (respondents aged 32–47) whilst the remaining 51% of respondents were classified as 'Baby Boomers' (respondents aged 48–66).

What we asked

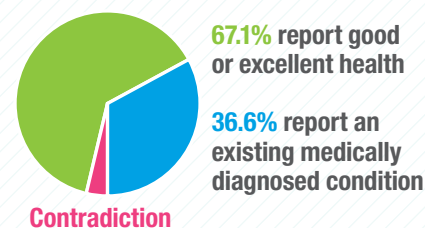
Participants were asked a range of questions relating to their attitudes, concerns and behaviours towards health in relation to themselves, their families and the wider population, now and into the future. You'll find a summary of responses on the pages that follow.

National Health Priority Areas

The National Health Priority Areas (NHPAs) are diseases and conditions that Australian governments have singled out for attention because they contribute significantly to the social and financial costs of illness and injury.

In light of this, a major focus of this report centres around participants' concerns and attitudes towards the NHPAs. You can find views and opinions on these on dedicated pages throughout this report. You can also find general NHPA information and statistics at the Australian Institute of Health and Welfare's website: www.aihw.gov.au

AUSTRALIANS AND HEALTH: A BUNDLE OF CONTRADICTIONS



When it comes to personal views on health and wellbeing, the average Australian considers themselves to be in good shape.

Over two-thirds of Australians (67.1%) surveyed indicated that they are in good or excellent health yet more than one-third (36.6%) have an existing medically diagnosed condition that affects their daily life, or live with a condition that requires regular medication.

To improve their overall health, more than half of those surveyed say they have reduced their salt, sugar and fat intake, and eat more fruit and vegetables.

At the same time, Australia is a sedentary nation – 42% of people acknowledged that they do not participate in general exercise like walking or running, go to a gym, attend a formal fitness program, or play an organised sport.

Unsurprisingly, given its increasing incidence globally, cancer tops the list of our future health concerns. Over a quarter of people ranked it as their top future health fear (27.4%), followed by heart attack (15.5%) and dementia/Alzheimer's disease (11.1%). Obesity arose as a major concern, particularly in relation to the younger generation. In fact, obesity was considered the biggest future health fear for our children (25.6%) – yet comparatively fewer are concerned about serious related conditions such as diabetes.

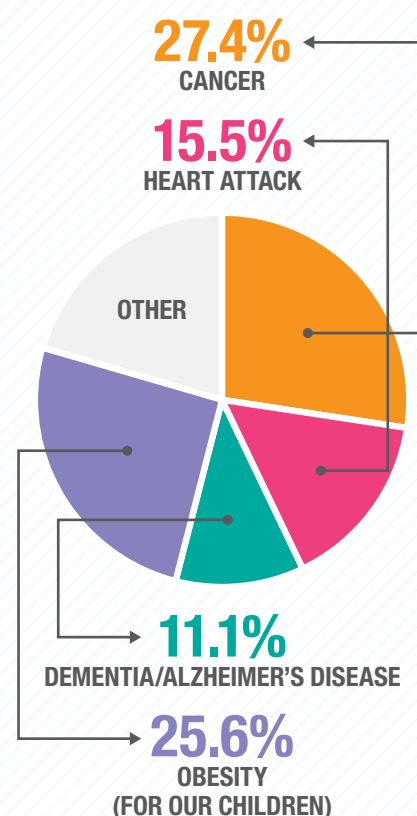
When it comes to visiting the doctor, almost three-quarters of Australians (74.2%) say they visit their GP when they're sick, yet only 5.2% visit for support with healthy lifestyle measures like diet and exercise.

In terms of medication, more than half (54.9%) take at least one prescription medicine. And around three-quarters (78.8%) believe prescription medicines are the most important part, or an important part, of treating illness and disease.

Supplements, like vitamins, minerals and fish oils, are also a popular choice among Australians in their efforts to maintain wellbeing. But while more than half (59.7%) take supplements daily, around one-third (33.5%) don't necessarily tell their doctor – raising concerns about the potential for adverse interactions between ingredients of medicines and supplements.

These findings suggest there is still a way to go in the quest for good health, and spotlights inherent contradictions in Australians' views and attitudes towards their own health and that of their families.

AUSTRALIANS' GREATEST HEALTH CONCERNS



A SNAPSHOT OF AUSTRALIA'S HEALTH, RIGHT NOW

THE HEALTH OF AUSTRALIANS



Excellent

It doesn't stop them doing anything in life.

Good

Feel well most of the time but occasionally have to reduce or stop their regular activities.

Poor or very poor

Often affects their daily activities.

Nearly a quarter of Aussies have a medical condition affecting their daily life

Almost a quarter of Australians (22.9%) say their health is excellent and that it doesn't stop them doing anything in life. The biggest group of participants (44.2%) describe their health as good; they feel well most of the time but occasionally have to reduce or stop their regular activities for health reasons. A small group (9.4%) describe their health as poor or very poor, and say it often affects their daily activities.

More than half (58.1%) believe their health today is the same or better than they would have expected 20 years ago.

When asked about their idea of good health, more than three-quarters of Aussies (78.4%) equate it with being free of illness. Around two-thirds associate it with being fit and exercising regularly (65%) and eating healthily (62.5%). More than half say good health means feeling content (53.6%) and able to deal with stress (52.1%).

Within this largely upbeat context, 23.1% of participants are most concerned about an existing medically diagnosed condition that affects their daily life. A further 13.5% are living with a condition that requires regular medication. To put this into perspective, in the year 2011–2012 alone, over 50 million prescriptions were filled for the top 10 prescription medicines available in Australia in 2011–2012.¹ As incidence of chronic conditions increases, and management of these often involves medical intervention, the need for better and more effective treatments has never been more apparent.

Over 50 million prescriptions were filled for the top 10 prescription medicines available in Australia

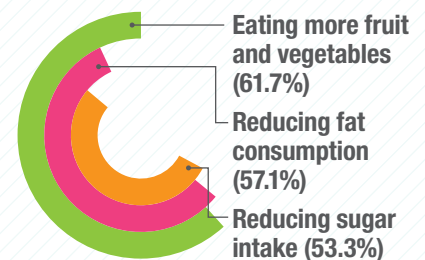
WE'RE EATING BETTER – YET MOVING LESS

Aussies are keen on modifying their diet to improve their overall health. The most popular way is eating more fruit and vegetables (61.7%), followed by reducing fat consumption (57.1%) and sugar intake (53.3%).

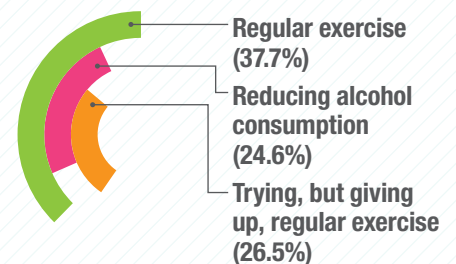
On a less positive note, regular exercise is less popular than dietary modification to improve overall health (37.7%), as is reducing alcohol consumption (24.6%). Additionally, more than a quarter of Australians (26.5%) report trying, but giving up, regular exercise.

More than half (58.1%) take prescription medicines and/or get vaccinated to prevent illness, demonstrating a strong awareness of medicines and vaccines as healthcare stalwarts. Taking supplements is also common, at 57.9%, while a modest 10.7% of Australians report practising meditation or relaxation.

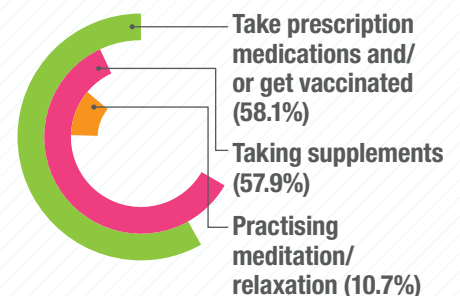
HEALTHY EATING



EXERCISE



MEDICATION AND ALTERNATIVES



NATIONAL HEALTH PRIORITY AREAS: MENTAL HEALTH AND DEMENTIA

DEMENTIA, THE THIRD LEADING CAUSE OF DEATH IN AUSTRALIA.



People affected aged under 65



People affected aged over 85³

Cases of dementia are projected to rise by 1/3 in less than 10 years.

Without a medical breakthrough, nearly 900,000 Australians will be living with dementia by 2050.⁴

31.7% nominating dementia as the greatest health risk facing their parents' generation

Australians are concerned about mental health—and with the combined effects of an increasingly high-pressure lifestyle and an ageing population, they're right to be. The Australian Medicines Industry is a world leader in researching, developing and trialling new treatments for mental health, with over \$50 million invested in research in this space in the year 2011–2012 alone.²

Dementia/Alzheimer's disease

Australia's third leading cause of death

Dementia is on the rise and so too its burden on the economy, on the community and on the families of those affected.

Dementia is progressive, irreversible, and highly distressing for sufferers and their families. The most common type is Alzheimer's disease, which accounts for around 50–75% of cases.

While current drug interventions do not stop dementia from progressing, they can improve or slow down declining brain function in some people.

Dementia threat fuels concerns for our parents' future

Around 11% of Australians identified dementia as the condition that worried them most about their future health. This figure rose to 15.4% for Baby Boomers with this group even more concerned about their ageing parents. Almost one-third (31.7%) nominated dementia as the greatest health risk facing their parents' generation.

Alzheimer's disease – Australia's worldwide collaboration

Globally, 98 clinical trials are underway to better understand, treat and ultimately prevent dementia. Domestically, The Australian Medicines Industry invests over \$71 million each year in dementia research.

Currently Australia is involved in a global collaboration between industry, academia and advocacy organisations to test two investigational agents to determine whether they can prevent Alzheimer's disease.

Depression and stress

Depression: putting the onus on Australia's GPs

Depression can cause sufferers to lose interest and pleasure in life, often in tandem with self-blame or suicidal thoughts.

The Australian Bureau of Statistics' most recent National Survey of Mental Health and Wellbeing (2007) estimated that 4.1% of adults had experienced symptoms of a depressive episode in the 12 months to October 2012.⁵

What's more, the 2008–09 Bettering the Evaluation and Care of Health (BEACH) survey of general practice activity found that depression accounted for more than one-third (34.3%) of mental health-related problems managed that year.⁶ This puts a substantial onus on GPs as healthcare providers 'at the coalface' to identify potential signs of depression and initiate the appropriate treatment and support.

Stressing out about stress

A relatively modest proportion of the Australians in the survey say depression is their greatest health concern (6.6% for their own health, and 8.6% for the younger generation's health).

However, a much higher proportion identify the more general condition of stress – a potential precursor to depression – as a significant health concern. More than one quarter (27.3%) of respondents are concerned about their partner's stress levels, while 17.5% are worried about stress in their adult children.

CONCERN OVER STRESS LEVELS



27.3%
in their partner



17.5%
in their adult children

Addressing the suffering

Over the last 10 years, 59 medicines have been registered in Australia for the treatment of mental health conditions, including depression. Globally, more than 60 late-stage trials are underway, focusing on depression.⁷



Dementia is fast becoming one of the major health burdens of our time. The good news is that research and development into new treatments is ongoing and there is hope for the future, as we work towards a world without dementia. It is encouraging to see too that the community is becoming more aware of its impact. For too long this devastating disease has been thought of as a natural part of ageing instead of a chronic health condition alongside cancer and heart disease.

Glenn Rees, Chief Executive Officer, Alzheimer's Australia

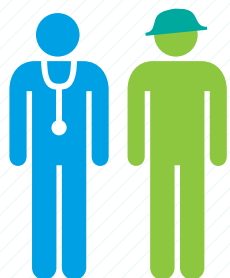
WHEN AUSTRALIANS GET SICK...



74.2%
visit the doctor
when they're
feeling sick

...we see our doctor, but delay making the visit

Most Australians visit the doctor when they're feeling sick (74.2%) but almost half (49.6%) wait until they've been feeling unwell for several days before visiting the doctor and simply 'soldier on'.



49.6%
wait several
days before
visiting the
doctor and
simply
'soldier on'

Almost one-third (30%) say they delay making an appointment because they generally avoid going to the doctor as much as possible, while nearly a quarter (24.5%) say work commitments get in the way of an earlier visit. A further 19.4% attribute the delay to difficulty getting an appointment.

Around one-third of Australians (32.9%) visit the doctor to manage an existing illness or disease, while 25.6% visit to manage or monitor risk factors for an illness or disease.

Aussies are generally pretty good at covering the basics of preventive health; 32.1% of those surveyed report seeing the doctor for measures such as check-ups, screening and vaccinations. However, very few (5.2%) seek medical advice about adopting healthier lifestyle behaviours such as modifying their diet, starting an exercise program or stopping smoking.

When they do see a doctor, most people (72.2%) see the same GP all or most of the time. Of those who saw more than one doctor in the previous 12 months, more than half (57.3%) said it was because they couldn't get in to see their regular GP.

Family matters

Australians are more vigilant about looking after their families' health than their own. Around two-thirds of those surveyed report being the primary carer when their spouse/partner (63.9%) or children (60.5%) are sick.

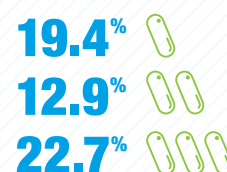
The majority of people (92%) are likely to take or advise their spouse/partner to see a doctor when they've been feeling unwell for three days, while almost every parent (94.2%) is likely to take their child or children to a doctor in the same situation.

Only as directed

More than half of those surveyed (55%) were taking prescription medication at the time of the survey. Around one-fifth (19.4%) reported taking one prescription medicine, whilst 12.9% were taking two. The remainder (22.7%) were taking three or more prescription medicines.

Australians believe they comply well with their doctor's directions for taking prescribed medicines. The majority (82.5%) say they always take it as directed. On the downside, one-third (32.4%) of those who do not adhere to their doctor's directions do so because they feel better, while a further 26.7% said they forget to take their medicine.

AUSTRALIANS' USE OF PRESCRIPTION MEDICINES



Doctors in the dark on supplement use

The survey results appear to confirm that many Australians are using complementary supplements like vitamins, minerals and fish oils alongside prescription medicines. More than half (59.7%) take at least one supplement daily. A large proportion (42.7%) take one or two daily, while 17.1% take three or more.

However, we're not always forthright about our use of supplements. Only two-thirds (66.5%) routinely tell the doctor when we're taking supplements. A modest 21.2% sometimes tell the doctor, while 12.3% don't mention it at all.

Online self-diagnosis doesn't appear to be widespread in Australia. Only 2.5% of those surveyed report checking their symptoms on the Internet when they start to feel unwell.

Learn more about your medicines

<http://www.ausmedindustry.com.au/explore-how-we-work/using-medicines/know-your-medicines/>

Eye health insights

Blindness can affect our ability to get around safely, contributing to the risk of falls and injury. It can affect emotional and social wellbeing, reducing our quality of life.

More than 444,000 Australians aged 55 or over are visually impaired. Age-related macular degeneration is the leading cause.

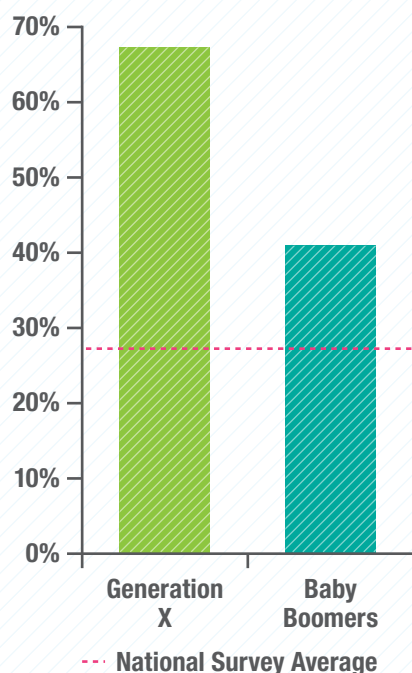
Despite these figures, only 2.8% of the Australians we surveyed nominated blindness as the future health condition that concerned them most. Within this context, Baby Boomers were more concerned than Gen Xs (3.7% versus 1.4%), so it seems there is at least some awareness that the risk of blindness can increase with age.



More than 444,000 Australians aged 55 or over are visually impaired^a

NATIONAL HEALTH PRIORITY AREA: CANCER CONTROL

CANCER AS A FUTURE
HEALTH CONCERN



Australians are more worried about cancer than any other serious health condition—and with good reason. Cancer is the biggest contributor to the burden of disease and injury in Australia, responsible for 1 in 10 hospitalisations in 2009–2010.³ On the upside, survival rates are improving, and more new treatments have been approved for Australians with cancer than any other disease.

More diagnoses, yet fewer deaths

In 2008, about 112,500 new cases of cancer were diagnosed in Australia. This was expected to rise to 121,500 in 2012.³

Cancer is a major cause of death in Australia, although mortality rates have been falling over the past two decades. In fact, cancer survival rates in Australia are generally high compared with most other countries. From 2006 to 2010, the five-year relative survival rate in Australia for all cancers combined was 66%.³

Cancer: Australians' universal health concern

Research findings in this survey affirmed the strong public awareness of cancer in Australia. Older and younger adults alike nominated the condition as their foremost future health concern (an average of 27.4%). Within this context, Generation X expressed more concern about cancer (67.8%) than Baby Boomers (41.2%). This may be because they are not at the point when specifically age-related health conditions become a pressing issue.

Cancer also topped Australians' views on the greatest health risk facing their generation (29.5%), and is the condition they would most like to see a cure for (47.9%).

**47.9% of
Australians would
most like to see a
cure for cancer**

Cancer R&D generates substantial investment

In 2011–2012, the National Health Priority Funding included over \$159 million into cancer-related research and development.⁹

Cancer treatments accounted for 56 of the 184 medicines approved to treat National Health Priority Area focus conditions. Globally, more than 900 medicines are in development to treat cancer.⁷

For more information please visit Cancer Council Australia:
www.cancer.org.au

Within the next 30 years, we have a real opportunity to fundamentally change the cancer landscape through the growth of personalised medicines. In terms of bowel cancer, currently Australia's second largest cause of cancer deaths, the combination of a comprehensive screening program and a range of accessible treatment options will be key to bridging the gap between today's five year bowel cancer survival rate of 66% and the 90% enjoyed by other common cancers.

Julien Wiggins, Chief Executive Officer, Bowel Cancer Australia



NATIONAL HEALTH PRIORITY AREAS: DIABETES AND OBESITY

**Almost 1 million Aussies
are currently diagnosed
with diabetes.**
If left untreated, diabetes can cause



eye damage



kidney damage



foot damage



cardiovascular disease

Every day in Australia, 280 people develop diabetes. It is the nation's fastest growing chronic disease and the sixth highest cause of death¹⁰ – yet Aussies don't see that the way they live is boosting their risk of developing this serious and potentially deadly condition.

Diabetes: Australia's rising epidemic

The human body needs insulin to convert the glucose from food into energy. People with diabetes either don't produce insulin (type 1 or 'juvenile' diabetes) or don't produce enough of it (type 2 diabetes). The glucose stays in the blood, creating dangerously high blood sugar levels.

If it remains untreated, diabetes can cause eye, kidney and foot damage which can lead to amputation. It can also cause cardiovascular disease such as heart attack and stroke.

Type 2 diabetes is the most common form of diabetes, accounting for about 85% to 90% of all cases.¹¹ Type 2 diabetes is on the rise in Australia and globally – corresponding with a marked increase in the prevalence of obesity.

Between 1989–90 and 2007–08, the prevalence of diabetes almost tripled from 1.5% to 4.1% of the Australian population.³ According to Diabetes Australia, almost 1 million Aussies are currently diagnosed with diabetes. A further 700,000 have undiagnosed diabetes.¹⁰

1

Diabetes deserves its national health priority status. There's over 1 million Australians living with type 2 and another 700,000 living with the condition but don't know about it yet. These numbers are staggering. It's important for Australians not to be complacent about their health as type 2 diabetes can be avoided or managed with healthy lifestyle changes and if appropriate, medical interventions.

Dr Susanne Fiedler, VP and Managing Director, MSD Australia and New Zealand



Expanding waistlines leading to ballooning health crises

Being overweight or obese is a factor in developing conditions such as heart disease, stroke, type 2 diabetes, osteoarthritis, some cancers and sleep apnoea. As excess body weight increases, so does the risk of chronic disease and death.

Australia has one of the highest rates of obesity amongst OECD countries. In 2007–08, almost two thirds of adults (61%) were overweight or obese. One in four was obese.³

Just as alarmingly, one in four Australian children are now overweight or obese. Without effective interventions in place, 6.9 million Australians are likely to be obese by 2025.¹²

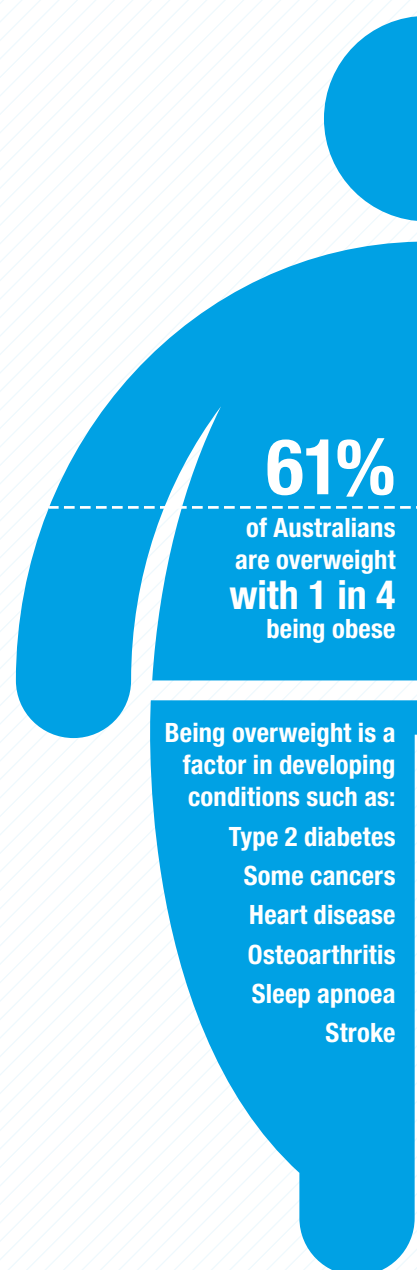
Too few are aware of the obesity-diabetes link despite obesity being a major precursor to diabetes, and prevalence of type 2 diabetes nearly 3 times greater in people that are obese.¹³

Prescription medicines: an adjunct to diet and exercise

The Australian Medicines Industry recognises that a healthier lifestyle is central to controlling the rising instance of obesity in Australia. However, for some people, particularly those with related illness or chronic disease, medical intervention is sometimes needed.

In 2011–2012, the National Health and Medical Research Council research funding for chronic diseases included more than \$72 million for diabetes.¹⁴

The Australian Medicines Industry is committed to improving outcomes for Australians living with diabetes. Treatments for the condition comprised 27 of the 184 medicines approved in the last decade to treat National Health Priority Area focus conditions.⁷ Globally, almost 200 diabetes medicines are in development.¹⁵



LIFTING THE LID ON THE OBESITY- DIABETES 'DISCONNECT'

Australians are very much aware of obesity as a general health issue. Many people we surveyed voiced concern about their partner leading a sedentary lifestyle (18.4%) and being overweight or obese (17.4%). Almost 15% of Australians felt obesity was the greatest health concern facing their own generation. This figure rose to 25.6% when people were asked what they saw as the greatest health concern facing the younger generation.

However, this awareness does not translate into a corresponding concern about the prevalence of diabetes. Only 6.8% of Australians nominated diabetes as the condition that most concerned them when thinking about their future health as an individual. A similarly low 6.3% felt diabetes was the greatest health risk to their generation, while only 6.8% thought the condition represented the biggest health threat to the younger generation.

These figures, coupled with the high proportion of Australians who do not exercise (page 9) or are concerned about family members' unhealthy diets (page 17), suggest a significant 'disconnect' in the national psyche between obesity and its ramifications; between understanding a health issue in principle and making the lifestyle changes that may help prevent complications.

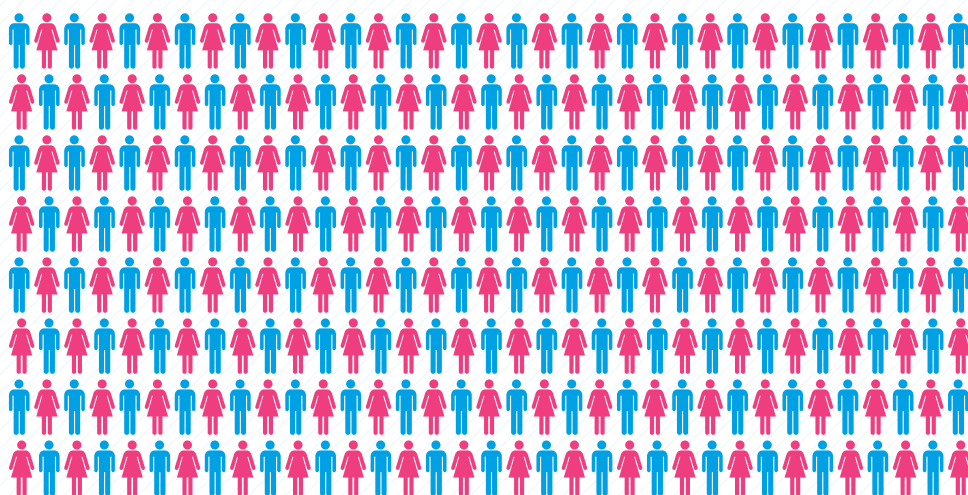


We know that the seriousness of diabetes is underestimated by many Australians. Part of the problem is the complications of diabetes are not known and taken seriously. Everything from heart attacks, strokes, kidney failure, blindness, amputations and more – but people don't realise diabetes is a major driver of these problems. In fact, when you take those complications into account, diabetes is expected to become the number one cause of disease burden in Australia in the next few years.

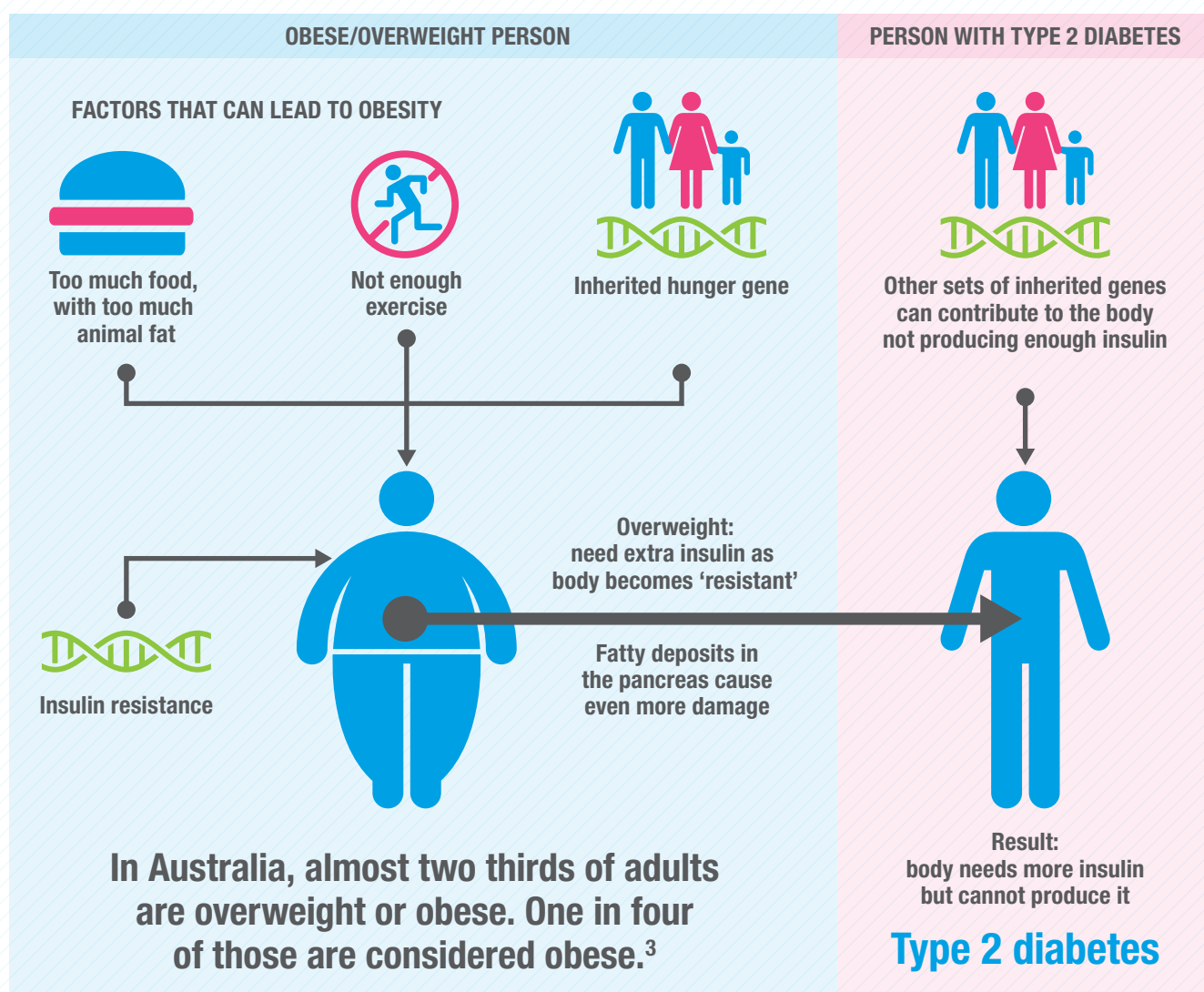
Professor Greg Johnson, Chief Executive, Diabetes Australia



Every day in Australia,
280 people
develop diabetes¹⁰



Type 2 diabetes is the most common form of diabetes, accounting for about 85% to 90% of all cases.¹¹ Type 2 diabetes is on the rise in Australia and globally – corresponding with a marked increase in the prevalence of obesity.



AUSTRALIA'S GREATEST HEALTH CONCERNS

Accidents, injury and stress: our biggest family health concerns

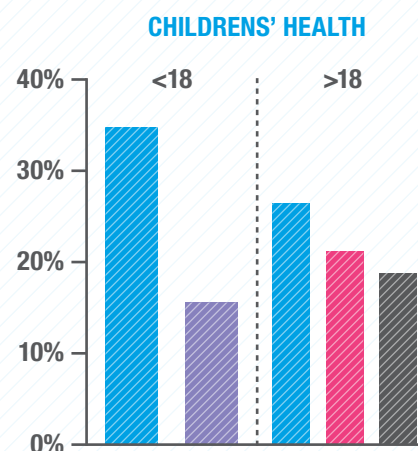
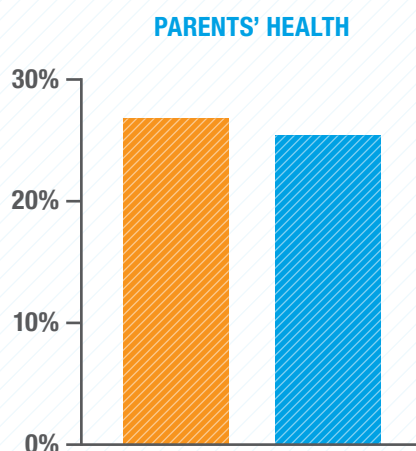
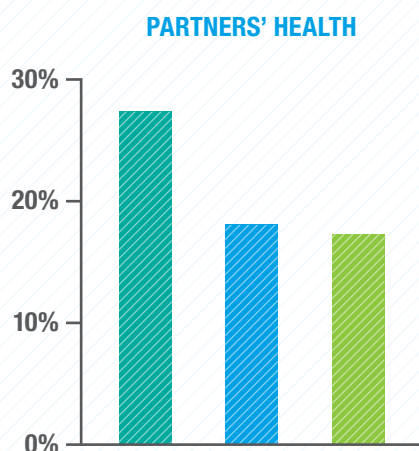
Overall, it seems Australians are fairly upbeat about their families' health. Around 90 per cent of those with children say their offspring are in good or excellent health. Of those with partners, more than two-thirds (70.6%) say their partner is in good or excellent health, and seldom has to reduce or stop their regular activities for health reasons.

These figures are lower when it comes to our parents, as might be expected given the ages of those surveyed. Less than half (44.7%) feel their parents are in good or excellent health. Around one-third (32.1%) describe their parents' health as average, while 23.2% say poor or very poor health interfered with their parents' daily lives.

Stress heads the list of the greatest current concerns for partners' health (27.3%) followed by accidents or injury (18%) and being overweight or obese (17.4%). Pre-existing illness tops the list of current concerns for our parents' health at 26.8%, closely followed by accidents and injury (25.4%).

Parents cite accidents or injury as their greatest current health concern for children under 18 (34%) while an unhealthy diet weighs in at 15.2%. Parents of children over 18 are most concerned about accidents or injury (25.8%), alcohol consumption (21.2%) and smoking (18.8%).

- Stress
- Accident or injury
- Being overweight or obese
- Pre-existing illness
- Unhealthy diet
- Alcohol consumption
- Smoking



56.9% believe today's young people will live to 85 or beyond, compared with 42% for their own generation

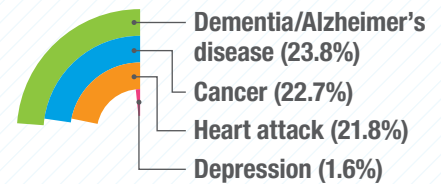
Obesity tops concerns for the younger generation

When Australians were asked to think beyond their own families, an interesting generational picture emerged. Dementia/Alzheimer's disease (23.8%), cancer (22.7%) and heart attack (21.8%) share virtually equal billing among the greatest perceived health risks for their parents' generation. Cancer (29.5%) tops the list of concerns for their own generation, followed by obesity (14.9%) and heart attack (12.6%).

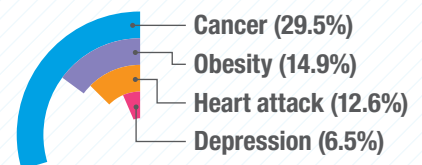
When asked about their children's generation or the younger generation as a whole, concerns about cancer fall to 18.6%, while concerns about obesity climb to 25.6%. Those surveyed are also more worried about the potential for depression to affect the younger generation (8.6%, compared with 6.5% for their own generation and 1.6% for their parents' cohort).

Despite their concerns about conditions like depression and obesity in young people, most of those surveyed believe the younger generation will have a longer life expectancy than their own. More than half (56.9%) believe today's young people will live to 85 or beyond, compared with 42% for their own generation.

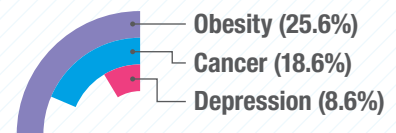
PARENTS' GENERATION



OWN GENERATION



CHILDREN'S GENERATION



Australian parents quit regular exercise

Does having or not having children make a difference to our health attitudes and behaviours? In some cases, yes.

Those without children reported higher rates of poor or very poor health than those with children (12.6% versus 8.4%) whilst a higher proportion of those without children have an existing medical condition that affects their daily life (25.9% versus 22.4%).

However, people without children are more likely to belong to a gym (15.4% versus 11.9%) and participate in general exercise like walking (50.9% versus 46.5%). To improve their overall health, those without children are also more likely to boost their fruit and veggie intake (65.2% versus 60.8%) and exercise regularly (43.5% versus 36.2%).

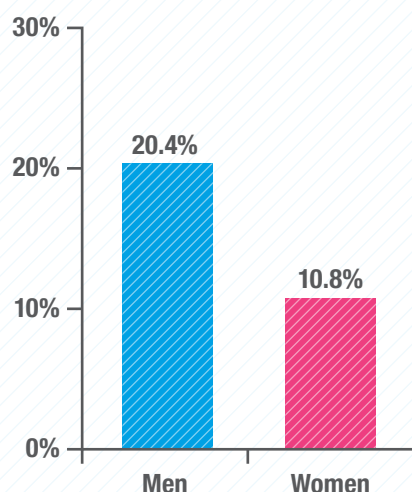
Worryingly, Australians with children are more likely to give up regular exercise (27.4% versus 23%), perhaps because family commitments eat into their leisure time.

NATIONAL HEALTH PRIORITY AREA: CARDIOVASCULAR HEALTH



**Every 10 minutes,
one Australian
suffers a
heart attack**

**HEART ATTACK AS A FUTURE
HEALTH CONCERN**



Men were almost twice as likely as women to identify heart attack as their most significant future health concern. This mirrors research showing that men are twice as likely as women to have a heart attack.³

Matters of the heart

Every 10 minutes, one Australian suffers a heart attack¹⁶ and on average 8,300 Australians die from stroke each year.³

Survival rates are improving – but there's much more to do. The Australian Medicines Industry is at the forefront of finding new ways to meet the personal and economic impact of these devastating conditions.

A spotlight on cardiovascular health

Heart attack: high awareness; rising survival rates

More than 380,000 Australians have had a heart attack. An estimated 47,700 Aussies aged 40–90 had a heart attack in 2009 – but almost two-thirds (63%) survived, compared with 47% in 1997.³

Regardless of their age, the Aussies we surveyed are strongly aware of heart attack. On average, 15% nominated it as the issue that most concerned them about their future health.

Stroke: Aussies largely unaware of our second biggest killer

Despite a steep decline in stroke-related deaths in recent years, it remains one of Australia's greatest killers after coronary heart disease.³

In fact, stroke kills more women than breast cancer³ – yet it does not have the same profile in the nation's health psyche, with an average of just 6.4% of Australians identifying it as the future health condition that concerns them most.

A pivotal place in research and development

Over the last decade, 29 new medicines have been approved in Australia to treat cardiovascular disease. Additionally, there are almost 250 medicines in development globally to help tackle this growing health burden.⁷

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Despite extensive public education efforts, many Australians are still underestimating their risk of heart disease due to the psychological law of self-exception or "It won't happen to me" syndrome. Believing they are healthier than they are, these Australians may put off simple but lifesaving interventions that would not only decrease their chance of future heart disease but generally improve their health and quality of life.

Lukasz Jagiello, Business Manager, Heart Support Australia



NATIONAL HEALTH PRIORITY AREA: ARTHRITIS

Arthritis and musculoskeletal conditions

Arthritis: Australians oblivious to this major cause of disability

In 2007–2008, arthritis accounted for more than 212,000 hospitalisations in Australia. It is a significant contributor to disability. More than one-third of Australians with arthritis face restrictions in their daily lives.¹⁷

Despite the prevalence of arthritis, the Australians we surveyed did not appear particularly concerned about the condition in relation to other health problems. Overall, just 6.4% identified it as the future health condition of most concern to them. Baby Boomers rated arthritis as a greater concern than younger adults (8% versus 4.7%).

Osteoporosis: another underrated health issue

It's estimated that 700,000 Australians have been diagnosed with osteoporosis.³ Osteoporotic fractures can restrict activity, reduce independence and lessen quality of life. In 2009, 74% of people with osteoporosis faced restrictions in employment.³

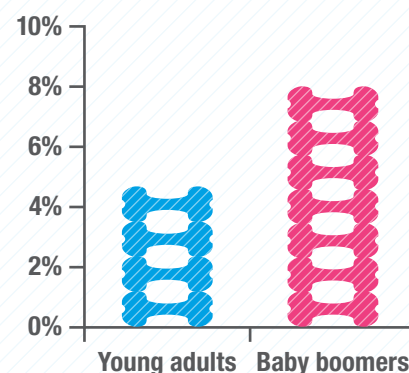
Despite this situation, the Australians we surveyed do not see osteoporosis as a major health concern. A mere 1.7% identified it as their foremost personal future health concern, although women expressed more concern (2.7%) than men (0.7%).

More than 50 medicines approved

Arthritis and osteoporosis treatments accounted for 53 of the medicines approved for use in Australia over the last decade.⁷

For more information visit Arthritis Australia: www.arthritisaustralia.com.au

ARTHRITIS AS A FUTURE HEALTH CONCERN

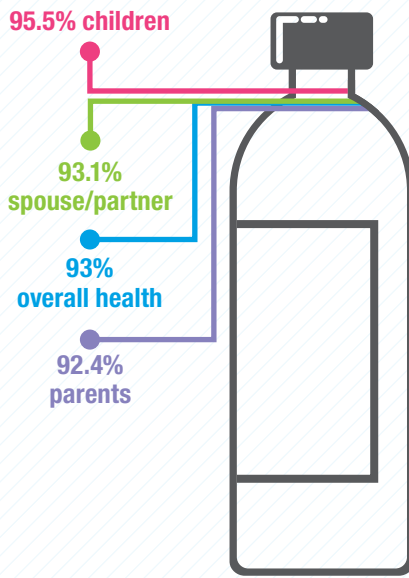


Almost 4 million Australians are living with arthritis, but by 2050 that number will likely increase to a staggering 7 million. Although arthritis and musculoskeletal conditions are classified as a National Health Priority, there is still a need for greater emphasis on reducing the growing burden of these conditions because, while there is no cure, medical advances and increased understanding of the condition ultimately enable better management.

Ainslie Cahill, Chief Executive Officer, Arthritis Australia

PREVENTION AND TREATMENT: BEYOND THE CUTTING EDGE

THE IMPORTANCE OF VACCINES FOR OUR FAMILY'S HEALTH



The role of medicines and vaccines in disease prevention

Australians have a healthy appreciation of the role of prescription medicines, with 93% saying they are an important part of treating illness and disease.

They are less confident or knowledgeable about the role of prescription medicines in *prevention*; with 77.3% of those surveyed saying they are important in preventing disease. The Australian Medicines Industry faces a considerable challenge in raising awareness.

Support for vaccines rides high

Nearly all Australians surveyed (93%) believe vaccinations are important for overall health. Specifically, they believe vaccinations are important in preventing illness and disease for their parents (92.4%), spouse/partner (93.1%) and children (95.5%).

Almost half of Aussies surveyed say they'd most like to see a cure for cancer (47.9%), followed by a cure for dementia/Alzheimer's disease (16.6%). The majority (70.4%) say they'd consider seeking a vaccination to prevent these and other diseases, if they were developed.

Vaccines have dramatically cut rates of conditions like meningococcal disease. In 2003 (the year before routine immunisation began) there were 490 reported cases. This figure fell to 259 by 2009.⁷

Over the last 10 years, 53 vaccines have been approved for use in Australia – ranging from measles, mumps and rubella; to human papillomavirus (HPV) to meningococcal meningitis and influenza.⁷

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The development of personalised medicines alongside companion diagnostics is the future of healthcare, allowing patients to be treated with the right medicine, in the right dose at the right time. More precise medicines will also help improve patient outcomes and assist payors and regulators make decisions that clearly benefit the patient.

Jason Smith, Managing Director, Novartis Australia



What's on the horizon?

Australian innovation delivers a life-changing return on investment

Australia is a world-leader in medical research, funding more than 700 clinical trials and investing more than \$1 billion annually in research and development.⁷

Of the 795 medicines approved for use in Australia over the last 10 years, one in four was a breakthrough using a newly discovered molecule, unique to any other currently used to combat disease.⁷

These 224 breakthroughs were an average of 15 years in the making – requiring testing of 10,000 new molecules, and a \$1.4 billion investment in research and development. The results are unarguably worth it: they've changed the way 52 diseases are treated.⁷

Biological medicines: the next frontier

Over the decade ahead, biological medicines are set to become one of the most important trends in medicine and vaccine research and development.

Biological medicines marshal the body's own defences to treat disease. With The Australian Medicines Industry playing a significant role in research and development, the nation can expect to see a rising emergence of therapies targeted at people with specific gene sequences in the hope of improving their response.

Find out about how medicines are made at www.ausmedindustry.com.au/explore-how-we-work/

**Australia is a
world-leader
in medical research...
investing more than
\$1 billion
annually**

It's in your genes

While it's debatable how much Australians currently understand about genetic testing to determine the likelihood of developing certain diseases, they are generally open to the concept. When asked if they would undergo a genetic test to understand their future health risk, 69.7% said yes, while 18.2% were unsure.

NATIONAL HEALTH PRIORITY AREA: ASTHMA

Serious respiratory illnesses and injuries add significantly to Australia's healthcare challenges – yet they don't always have the same public profile as other conditions.

Asthma affects one in ten Australians. There is currently no cure, although good management can prevent or control symptoms.¹⁸

In 2010–2011 there were more than 37,000 asthma-related hospitalisations in Australia.¹⁹ Although the nation's asthma-related death rate has fallen since the early 1990s, more than 400 Australians died from asthma in 2009.³

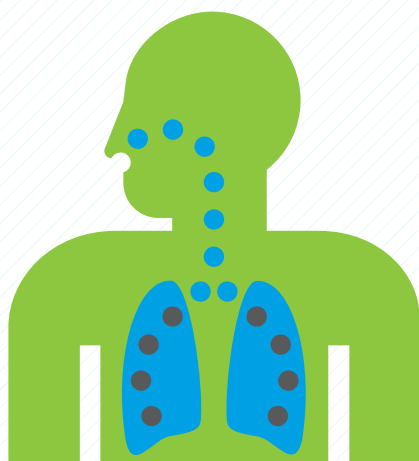
While there is currently no cure for asthma, there are effective management strategies available to control the disease and prevent the worsening of asthma symptoms.¹⁸

Aussies breathing easy over respiratory distress

Although asthma, COPD and pneumonia account for a fair share of hospitalisations in Australia and can significantly affect quality of life, most people we surveyed did not consider them major health issues. An average of 3.6% regarded them as the most significant future concern in relation to their own health. However, this figure differed between age groups. Baby Boomers surveyed were more concerned than Gen Xs (8.5% compared with 5.8%).

Drug therapy: the mainstay of asthma management

Over the last 10 years, 13 asthma medications have been approved for use in Australia and globally, while 383 treatments for respiratory disease (including asthma) are under development.⁷



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Notable advances have been made in asthma over the last two decades – mortality more than halved, as well as significant reductions in hospital admissions, emergency department attendances and unnecessary GP visits. But there is more to be done as we work to find new and innovative ways to support Australians living with asthma. Ongoing collaboration is critical – between respiratory physicians, allergists, GPs, pharmacists, asthma educators, the eight Asthma Foundations, the National Asthma Council and the pharmaceutical sector, as all play a vital role in improving asthma management.

Kristine Whorlow, Chief Executive Officer, National Asthma Council Australia



NATIONAL HEALTH PRIORITY AREA: INJURY PREVENTION AND CONTROL

Injury has a major – yet often preventable – effect on the nation's health. It affects people of all ages, is the greatest cause of death in the first half of life, and leaves many with serious disability or long-term conditions. Around 421,000 Australians were hospitalised with injuries in 2009–10.³

Males are more likely than females to be hospitalised for most types of injury and injuries overall. However, the average length of stay is longer for females than males, reflecting the large number of older females hospitalised for hip fractures.³

On average, the number of hospitalised injury cases was highest for teenagers and young adults aged 15–24. In those aged under 65, the hospitalisation rate was greater for males than females and was largely due to transport injury (road crashes) and interpersonal violence. In those aged 65 and over, more females were hospitalised than males, due mainly to injury from unintentional falls.³

Aussies clued up about injury prevention

Pleasingly, Australians in our survey note a strong awareness of injury prevention, particularly in relation to family members. Almost one-fifth (18%) of Australians say they are concerned about their partner's potential for accidents or injury. This figure rises to 25.4% regarding concerns for their parents, 25.8% for their adult children, and 34% for children under 18.

Local research to make Australians safer

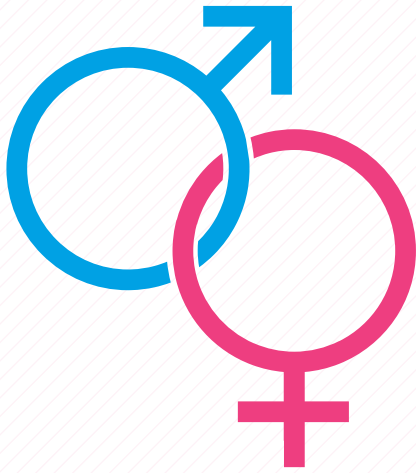
The Australian Medicines Industry recognises Australians' concerns about the potential for injury to dramatically affect the lives of older and younger family members alike.

In 2011–12, National Health and Medical Research Council research funding included \$38 million for 245 active injury research projects.²⁰



**Around 421,000
Australians
were hospitalised
with injuries
in 2009–10³**

A NATION DIVIDED: THE GENDER DIVIDE



A look at the survey's results within key demographics reveals that, when it comes to health, Australia is not as equal as we'd like to think.

It seems that gender makes a difference to how people perceive health issues in general, and the way they manage their own health.

The gender divide – a stark contrast to views on health

When asked what constitutes their idea of good health, women consistently outranked men in responses related to physical yardsticks such as being fit (70.2% vs 59.4%), maintaining a healthy diet (69.8% vs 54.8%), getting enough sleep (69.4% vs 57.3%), not smoking (54.3% vs 45.2%), and drinking alcohol within recommended limits (40.6% vs 32.3%).

Women place more emphasis than men on psychological measures of good health, such as feeling happy in personal relationships (55.6% vs 47.7%) and being able to handle stressful events (57.5% vs 46.5%).

When it comes to improving their overall health, men (36.1%) are slightly more likely than women (33.9%) to take prescribed medication. By contrast, women are more likely to take supplements (51.6% vs 39.7%).

More women than men modify their diet in various ways for health reasons; yet more men than women report reducing their smoking (18.5% vs 14.2%) and drinking (26.3% vs 22.9%).

More than 40% of Australian men and women do not exercise.

On the exercise front, participation rates of men and women in general exercise such as walking; running and swimming are virtually on par (46.7% and 48.1%). Interestingly, and perhaps somewhat alarmingly, there's little difference between the high proportions of men and women who don't exercise at all (42.2% and 41.9%). Women (76.1%) are more likely than men (72.1%) to visit the doctor when they are sick. In saying that, women (47%) are more likely than men (40.3%) to push on with most of their activities when they start to feel unwell. This may be related to their greater role as primary carers of children in some households – the survey also found that more women (78.8%) than men (51.7%) are the primary caregiver when a family member becomes sick.

A NATION DIVIDED: THE GENERATIONAL DIVIDE

There's a lot of talk about the 'generational divide' – and when it comes to health, it seems there's good reason.

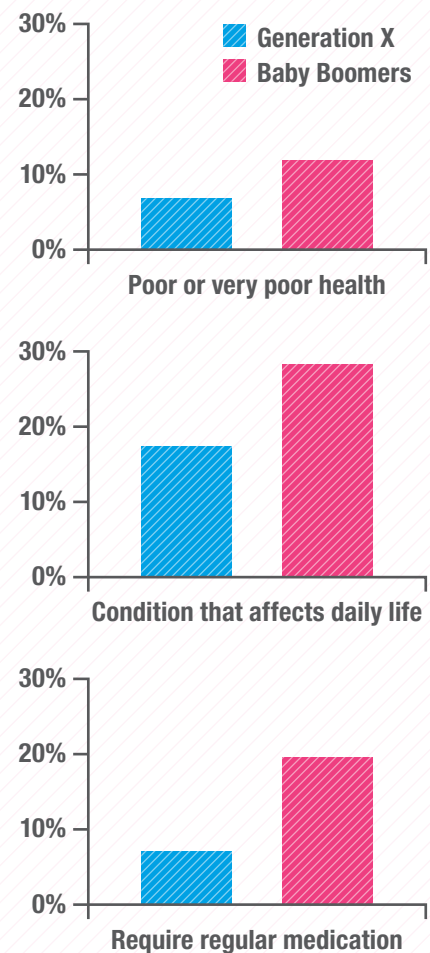
Generational differences between Baby Boomers and Generation X highlight marked differences in health perceptions, status and behaviours.

More Baby Boomers than Xs say they have poor or very poor health (11.9% vs 6.8%). More Boomers than Xs have a medically diagnosed condition that affects their daily life (28.5% vs 17.5%). Almost a fifth of Boomers (19.7%) are developing a condition that requires regular medication, compared with 7.1% of their X counterparts.

To improve their overall health, Boomers are more likely than younger adults to modify their diet in various ways, stop smoking (18.7% vs 14.1%), take prescription medicines (48% vs 21.4%), take supplements (48.5% vs 43.1%) or get vaccinated to prevent illness (29.5% vs 16.8%).

Boomers are more likely than Xs to see a doctor to manage an existing illness or disease (39.9% vs 25.5%) and for preventive measures such as screening, vaccinations and check-ups (36.6% vs 27.6%).

When it comes to their future health concerns, both age groups are equally concerned about their heart attack potential, at 15.5%. Perhaps unsurprisingly, Boomers are noticeably more concerned than Gen Xs about dementia/Alzheimer's (15.4% vs 6.8%), stroke (8.6% vs 4.1%) and arthritis (8% vs 4.7%). By comparison, Gen Xs are more concerned about cancer (34.2% vs 20.8%) and depression (8.5% vs 4.7%).



A sobering truth?

Getting older doesn't change Australians' contradictory attitudes to drinking. Whether they are Baby Boomers or Gen Xs, just over 36 per cent of people regard drinking alcohol within recommended limits as a measure of good health.

The proportion of those who reduce their drinking to improve their overall health is also line-ball between the two age groups – yet it's considerably lower than the 'good health' measure, at just over 24 per cent.

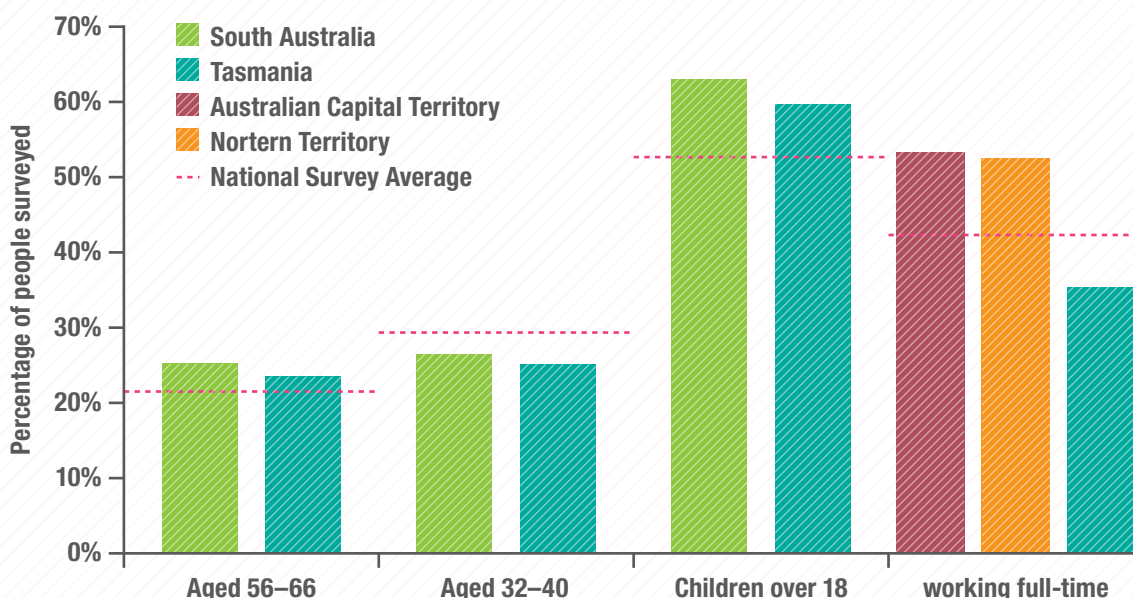
When it comes to alcohol, it seems there's a disconnect between what Australians know is good for them, and what they actually do.



A NATION DIVIDED: THE GEOGRAPHIC DIVIDE

The state of play: a complex picture

Australians like to think of themselves as alike in many respects, but it seems that's not always the case when it comes to their health. The State or Territory in which we live (or more specifically, the demographic characteristics of our State or Territory) seems to make a difference to our health-related attitudes and behaviours.



Northern Territorians ('Territorians or Top Enders') report the highest rate of "excellent" current health

Overall, in our survey results the two Territories and Tasmania differ the most from the national norm. **Northern Territorians ('Territorians or Top Enders') report the highest rate of "excellent" current health** and Tasmanians the lowest (36.4% and 19.2% respectively, versus the 22.9% national average).

Tasmanians report the highest rate of poor health, at 10.8% compared with the 7.3% national average. They also report the highest rate of an existing diagnosed medical condition affecting their daily life (26.7% versus a national average of 23.1%).

NT people have the most positive view of their current health, with 40.9% reporting no concerns, versus the 30.2% national average.

Climate differences between States could play a role in people's health behaviours. **Victorians are the biggest gym junkies (15.5% versus the 12.7% national average)**; whilst Territorians are the biggest participants in organised sport, at 13.6% versus the 8.3% national survey average.

Canberrans do the most general exercise, such as running, swimming and walking (55.6% versus the 47.4% national survey average). The Top End has the highest proportion of people who don't do any exercise (47.7%).

When it comes to improving their overall health, Canberrans are the most likely to reduce salt, sugar and fat. **Queenslanders are the most likely to quit smoking (18.3% versus the 16.4% national average). Tasmanians are the most likely to take prescription medicines, at 43.3% versus the 34.9% national survey average.** By contrast, Canberrans are the most likely to take supplements (53.1% versus the 45.9% national survey average).

The State-based divides continue in the areas of vaccinations and GP visits. **Canberrans are the most likely to get vaccinated to improve their overall health (28.4%)**, whilst Tasmanians (16.7%) and NT people (15.9%) are the least likely, compared with a 23.2% national average.

Canberrans are the most likely (43.2%) to visit the doctor for preventive measures like screening and vaccinations. Top Enders are the least likely, at 25% versus the 32.1% national survey average. Territorians are also the least likely to visit a doctor if they've been sick for three days (22.7% versus the 15% national survey average).

Almost two-thirds of NT people reported that they weren't taking prescription medication when surveyed, compared with the 45.1% national survey average. However, their compliance rate was the highest, at 95.5% compared with the 83.1% national average.

Stress is the greatest concern for people across the nation when it comes to their partner's health (27.3%). Queenslanders are the most concerned about their partner's smoking (15.2% versus the 12.9% national survey average) whilst Top Enders are the most likely to be concerned about their partner's drinking (20.7% versus the 11.1% national survey average). **South Australians are the most worried about their partner's weight (23.3% versus the 17.4% national survey average).**

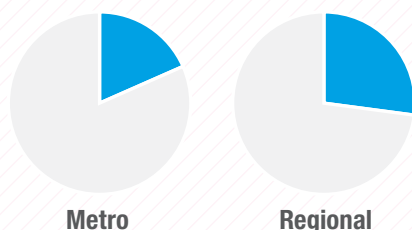
Parents across Australia are uniformly concerned (15.2%) about the unhealthy diets of their children aged under 18 but Territorian parents express the greatest concern about their children drinking (25% versus the 7.6% national survey average for children under 18, and 33.3% versus the 21.2% national survey average for adult children).

The 'tyranny of distance' appears to come into play, too. Top Enders are the most concerned about their parents' access to health and medical services (21.9% versus the 11.3% national survey average).

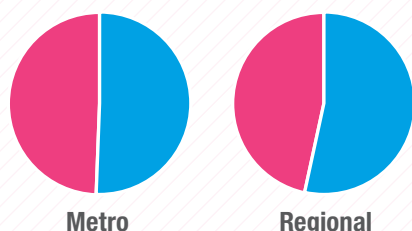
Parents across
Australia
are uniformly
concerned about
the unhealthy
diets of their
children aged
under 18

A NATION DIVIDED: THE RURAL/URBAN DIVIDE

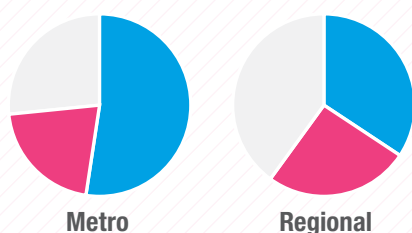
Aged 58–66



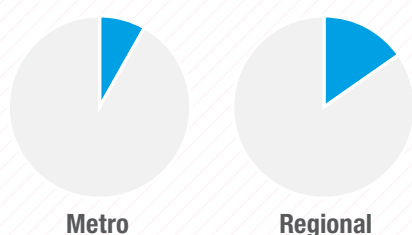
Male or Female



Full-time or part-time/casual work



Retired



Almost half of regional Australians aren't exercising

Australians' health attitudes and behaviours differ not just according to their State or Territory, but whether they live in a regional or metropolitan area.* 32.7% of metropolitan respondents were aged 32–40, versus 22.8% for regional respondents.

- 18.4% of metro respondents were aged 58–66, versus 27.1% of regional respondents.
- The gender split differed between the metro and regional groups. There were more women amongst the regional sample (53.4%) than the metro sample (50.6%).
- Regional people were less likely than metro people to be working full-time (52.4% vs 34.3%) and more likely to be working part-time/casually (25.7% vs 21%).
- Regional people were more likely to be retired (15.3%) than metro people (8.2%).

The overall age profile of regional people in the survey was higher than that of city-based participants, which may have influenced the nature of their responses. (This broadly reflects the age difference between city and regional Australia as highlighted in the 2011 Census.)

Regional Australians generally feel less well than their city counterparts. Around two-thirds (62.7%) say their health is excellent or good, compared with 69.4% of city people.

More regional people (26.7%) than metro people (21.1%) have a medically diagnosed condition that affects their daily life.

*** (Note: because of the small populations involved, the survey classed ACT residents as metropolitan, and did not differentiate between metropolitan and regional residents in Tasmania and the Northern Territory. Therefore, the data in this section of the report relates to NSW, Vic, Qld, WA, SA and ACT only).**

When asked about their idea of good health, regional Australians were more likely than city people to emphasise 'quality of life' measures like feeling content (56.8% versus 52%), being happy in personal relationships (53.7% versus 50.7%), and being able to handle stressful events (54.3% versus 51%).

A higher proportion of country (45.5%) than city people (40%) don't do any exercise. At the same time, they are more likely than city people to improve their overall health by modifying various aspects of their diet, quitting smoking (18% versus 15.6%) and drinking less alcohol (28.8% versus 22.7%).

They are also more likely than metropolitan dwellers to take prescription medicines (40% versus 32.2%) and get vaccinated to prevent illness (26.2% versus 22%), a surprisingly low figure, given that 91.9% of Australian children aged 5 and under are fully immunised against childhood diseases.²¹

Country people were more likely (24.9%) than city people (16.3%) to delay going to the doctor because they couldn't get an appointment. Correspondingly, a higher proportion of regional Australians ranked a lack of access to healthcare facilities as the greatest health risk facing their own, their parents' and their children's generations.

Areas such as cancer, cardiovascular disease and mental illness are real concerns for Australians when it comes to their health and we are focused on finding solutions which meet this need and enable them to live happier, healthier lives.

In light of this, the need for breakthrough medicines has never been greater, particularly for age-related conditions such as dementia, which is rapidly becoming the chronic condition of our time. The ability to provide more hope and relief to patients in these disease areas is our ultimate goal.

**Chris Miskel, General Manager, Eli Lilly Australia-New Zealand
(September 2010 – January 2013)**



WHERE TO NOW FOR AUSTRALIA'S HEALTH?

It's clear that Australians are concerned about maintaining and improving their health. Lifestyle measures such as dietary modification and exercise are a vital part of this – but the findings of *Facing the Health of Australians* highlight the need for a concerted effort from healthcare organisations, researchers and governments to further educate Australians about the potential for certain medical conditions, along with new and potential methods of prevention and treatment.

With its world-class researchers and long-term financial investment in developing innovative and effective medicines and vaccines, The Australian Medicines Industry is proud to support Australians as they move towards better health and a higher quality of life.

Find out more about the work of The Australian Medicines Industry at www.ausmedindustry.com.au

The Australian Medicines Industry

The Australian Medicines Industry is a vibrant and innovative industry with dedicated Australians doing extraordinary things. It's an industry that invests more than \$1 billion in Australian medical research and development, contributes around \$4 billion in exports, and provides over 13,000 skilled jobs – but it doesn't end there. By supplying medicines that fill around 271 million prescriptions each year, The Australian Medicines Industry helps ease pain, cure disease and save lives – all of which contribute to keeping the average Australian's life expectancy at one of the highest in the world.



The Medicines Industry plays such an important role in Australia, not only in research and development and medicine discovery, but in a range of other areas that are often not at the forefront of public thought. Innovative medicine development underpins all that we do, but the Medicines Industry in Australia is also at the cornerstone of a knowledge driven economy. With proper support from government the Industry has the potential to be a major engine for economic growth for high tech medicine manufacturing and exports to the Asian market.

**Mark Fladrich, Managing Director, AstraZeneca Australia and New Zealand
interim Chairman, Medicines Australia**

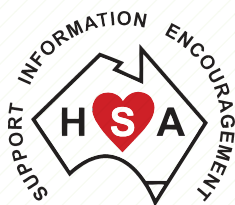
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THE AUSTRALIAN MEDICINES INDUSTRY – MEMBER COMPANIES

Abbott Australasia Pty Ltd
AbbVie Inc
Actelion Pharmaceuticals Australia Pty Ltd
Allergan Australia Pty Ltd
A. Menari Australia Pty Ltd
Amgen Australia Pty Ltd
Andrew's Refrigerated Transport
Astellas Pharma Australia
AstraZeneca Pty Ltd
Baxter Healthcare Pty Ltd
Bayer Australia Limited
Biogen Idec Australia Pty Ltd
Boehringer Ingelheim Pty Ltd
Bristol-Myers Squibb Australia Pty Ltd
Celgene Pty Limited
Commercial Eyes Pty Ltd
Covance Pty Ltd
CSL Limited
Eli Lilly Australia Pty Ltd
FIT-BioCeuticals Ltd
Fresenius Kabi Australia Pty Ltd
Genzyme Australasia Pty Ltd
Gilead Sciences Pty Ltd
GlaxoSmithKline Australia Pty Ltd
IDT Australia Limited
IMS Health Australia Pty Ltd
INCRsearch Australia Limited

iNova Pharmaceuticals Pty Ltd
Ipsen Pty Ltd
IQnovate Ltd
Iris Interactive Pty Ltd
Janssen Pty Ltd
KMC Health Care
Leo Pharma
Lundbeck Australia Pty Ltd
Medlab Pty Ltd
Merck Serono Australia Pty Ltd
MSD Australia Pty Ltd
Mundipharma Pty Ltd
Norgine Pty Ltd
Novartis Pharmaceuticals
Novo Nordisk Pharmaceuticals Pty Ltd-Australia
Pfizer Australia Pty Ltd
Pretium Pty Ltd
PricewaterhouseCoopers
Princeton Publishing Pty Ltd
Quintiles Pty Ltd
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Servier Laboratories (Aust) Pty Ltd
Shire Australia Pty Limited
Takeda Pharmaceuticals Australia Pty Ltd
UCB Australia Pty Ltd
Vifor Pharma Pty Ltd



The Australian Medicines Industry would like to acknowledge these contributors to the report

