



Bupa Pulse Check 2024

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.

In November 2022, Quantum and Bupa partnered to conduct a study to track Australians changing attitudes and behaviours towards health and wellbeing across a range of aspects. In 2023 this study was repeated for its second year with a focus 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
- Understand sentiment and impact across a range of aspects such as chronic disease, the environment and technology on Australians health and wellbeing
- Understand current behaviours and attitudes towards healthcare access

Quantitative Methodology

Online survey of n=2,000 Australians aged 18-79 per year

Sample sourced via an online panel provider

11 - minute survey

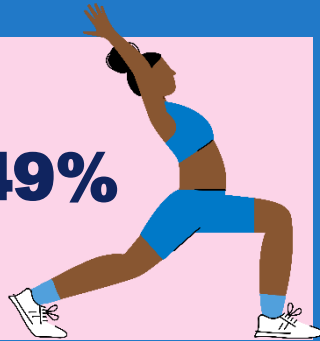
Data weighted to Australian population

	2022		2023	
	Proportion of sample (weighted) %	Number of respondents n=	Proportion of sample (weighted) %	Number of respondents n=
Total	100%	2,006	100%	2,005
Gender				
Male	50%	1,000	49%	998
Female	50%	1,004	50%	1004
Non-binary	0%	2	0%	2
Another gender	0%	0	0%	1
Age				
18-29	22%	434	20%	429
30-39	18%	365	19%	364
40-49	18%	356	17%	358
50-59	16%	316	16%	317
60-79	27%	535	29%	537
State				
NSW	32%	636	32%	643
VIC	26%	517	26%	516
QLD	20%	407	20%	408
SA	7%	141	7%	141
WA	10%	209	10%	209
ACT	2%	35	2%	36
NT	1%	16	1%	8
TAS	2%	45	2%	44

- The maximum margin of error (at the 95% confidence interval) on the 2023 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.
- 17th – 30th November 2023 (Previous: 22nd – 30th November 2022)
- Incentives provided in line with standard panel rates

Summary of findings – by the numbers

Aussies increased focus on fitness activities – **49%** doing at least 1 physical activity

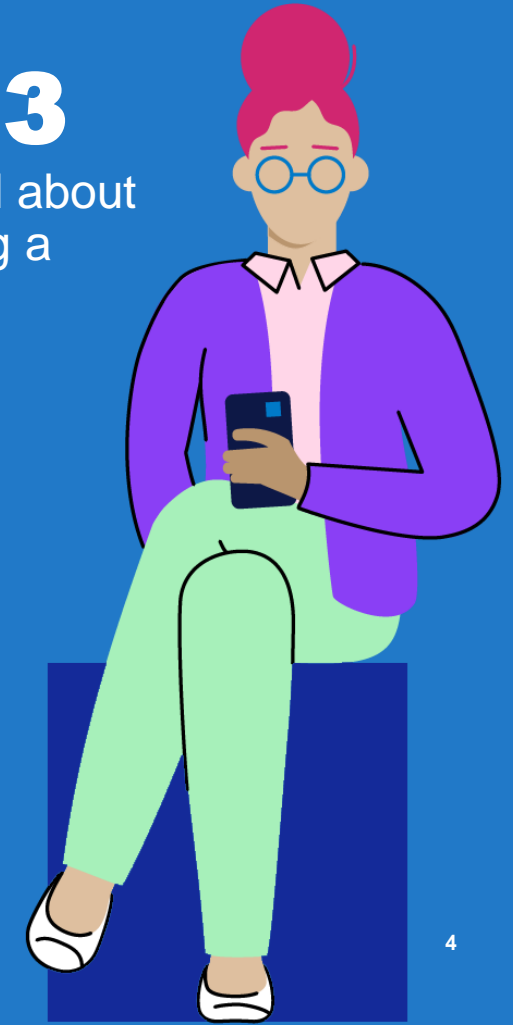


49% say their generation is **less healthy** than the one before it

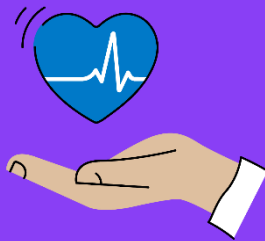


2 in 3

concerned about developing a **chronic illness**

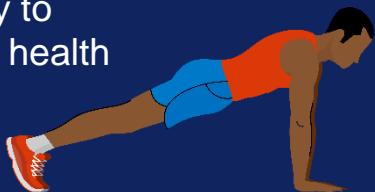


1 in 6 rated their **mental health** as poor

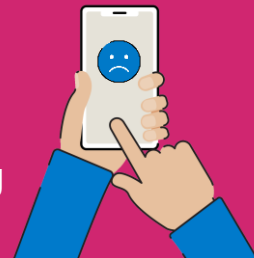


2 in 5 struggle to manage their **health and wellbeing**

Exercise most common activity to improve mental health



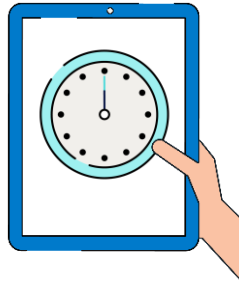
1 in 3 feel **technology** negatively impacts their mental wellbeing



Summary of findings – by the numbers

16%

reduced time on devices to manage health and wellbeing



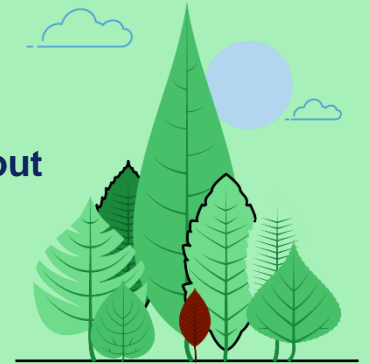
45%

of Aussies cutting back on alcohol



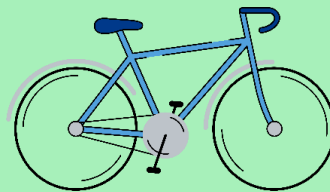
1 in 5

felt positively about the environment



50%

still hold concerns about future pandemics



48%

used active transport (cycle, walk or run) more often in the last 12 months

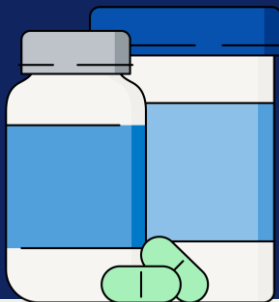
48%

feel accessing healthcare in Australia was complicated



62%

take vitamins/supplements



10%

of Aussies took up running the last year

3 in 4

don't want specialists to use AI to diagnose them



Key findings



Australians appear more focused on their health and wellbeing in 2023.



In light of continued cost of living pressures across 2023, Australians finances were now the main driver of overall health and wellbeing.



Connections with those around us remain the key driver of mental health in 2023.



On par with 2022, two in five Australians (38%) were struggling to manage their health and wellbeing, where cost remains the main barrier



Two in three (65%) Australians were concerned about developing a chronic illness in 2023.

More Australians were undertaking a range of different fitness activities, taking vitamins/supplements regularly and reducing alcohol use than in 2022.

While forms of physical/ mental self care were not widely practiced by the majority (44%), there was a higher proportion wanting to/currently undertaking self-care and practicing gratitude/journaling in 2023.

Younger Australians also had the strongest desire to explore new trends and try new things in health and wellbeing (53%).

Australians' perceptions of their overall quality of life remains unchanged from 2022, where over half (56%) felt their quality of life was excellent/good. One in ten (10%) felt their quality of life was poor, a sentiment largely driven by those more financially vulnerable such as renters and low-income households.

In contrast to this, more Australians felt their overall quality of life had worsened over the past 12 months (from 31% to 35%) driven largely by mortgage holders (from 34% worse in 2022 to 39%) and renters (from 31% to 40%), unsurprising given the pressures of rate rises and rent rises on housing affordability.

Our finances are now the secondary driver behind social connections.

Those younger continue to be struggling with their mental health most, with one in five (21%) aged under 30 rating their mental health as poor.

Half (53%) of all Australians accessed at least one form of mental health assistance over the year, and one in three (31%) looked to family or friends for support. Outside of family and friends, two in five (41%) accessed a more formal form of support.

Exercise was the main activity undertaken to improve mental health, followed closely by eating healthy, spending time with family and friends, getting enough rest and spending time in nature.

Among those who felt they were successful in managing their health and wellbeing, building things into their routine was the most significant way Australians claimed it helped them successfully manage their health and wellbeing (29%).

This was followed by reward, preparation, buddies & goals.

This was a significant drop from almost four in five (68%) in 2022.

Top of the concerns about developing a chronic condition and significantly up from 2022 was cancer (from 24% to 29%), followed by arthritis (25%) and back pain (24% down from 27% in 2022).

Key findings

Australians made more use of active transport in 2023, where one in five ran weekly (21%).



Four in five Australians (78%) walked, one in five (21%) ran, and one in seven (14%) cycled weekly.

Running had high take-up, where one in ten (10%) took up weekly running within the last year, while just under one in ten (8%) had been running for more than 5 years.

The key drivers to running was for the health or energy benefits.

Spending time outdoors in nature was on the rise, but half (45%) were stressed about our impact on the environment.



Concern was highest among younger Australians, particularly those aged under 40 and this is consistent with a growing recognition of the connection between climate change and mental health.

Half felt healthcare access was complicated (48%) and two in three experienced a barrier to access over the past year (66%).



Wait times and limited appointments were the main hurdles to healthcare access among three in ten (30% and 29% respectively), this was followed closely by over one in four saying healthcare was too expensive/costly (27%).

While there remained a preference for in-person appointments, desire and use of telehealth and videoconference remains consistent with 2022.



There was however a desire among regional residents to shift away from online services in future.

In-person appointments had a higher preference among those older, where top drivers of use were ability to be more thorough/ physical, better quality and easier for patients to build relationships with their practitioners.

Online care was preferred among those younger, where the top drivers were no need to travel, convenience, quicker/less wait times and ease of access.

Use of technology in health and fitness is on the rise, but Australians are also feeling the impacts of technology on their mental wellbeing.



Australians were more likely to use an online exercise program (13% from 11% in 2022) and there was also a growing desire to monitor health and fitness using an app/wearable with more Australians claiming to be doing so, or to have a desire to do so in future (from 52% in 2022 to 49% neither). Both trends were largely driven by younger Australians.

Despite this, one in three (34%) feel technology is negatively impacting their mental wellbeing, a sentiment held by over half of those aged 18-29 (53%).

As a result one in six (16%) Australians limited or reduced time spent on devices to help them manage their health and wellbeing, and one in ten (9%) partook in a 'digital detox' or spent less time online to improve their mental health.

While there is an appetite to make more use of technological advancements in healthcare, there remains strong hesitancy.



Use of AI by specialists to diagnose health issues was not attractive to most at the moment (75%) – however, one quarter (25%) would be interested indicating that there is a market for greater use of technology in healthcare.

Just over half (55%) say they would welcome doctors sharing their health data with allied health professionals.



Summary:

- Australians have increased their focus on health and wellbeing, upped their activity and moderated lifestyle factors such as alcohol
- Costs and cost of living are barriers to increased focus on health and wellbeing
- Quality of life is strongly correlated with good/excellent health and wellbeing - those who rate their health in this way are eight times more likely to rate their quality of life as good/excellent than those who rated theirs as poor
- Running is on the up - time and cost are key drivers
- Mental health is important, but physical health is still more so
- Technology use for fitness is on the rise, including wearables and apps/programs, especially among younger generations
- Younger Aussies are seeking help to be healthier and don't rate themselves as healthy as the previous generation. Quality of life had been diminishing for some over last 12 months – mostly related to money

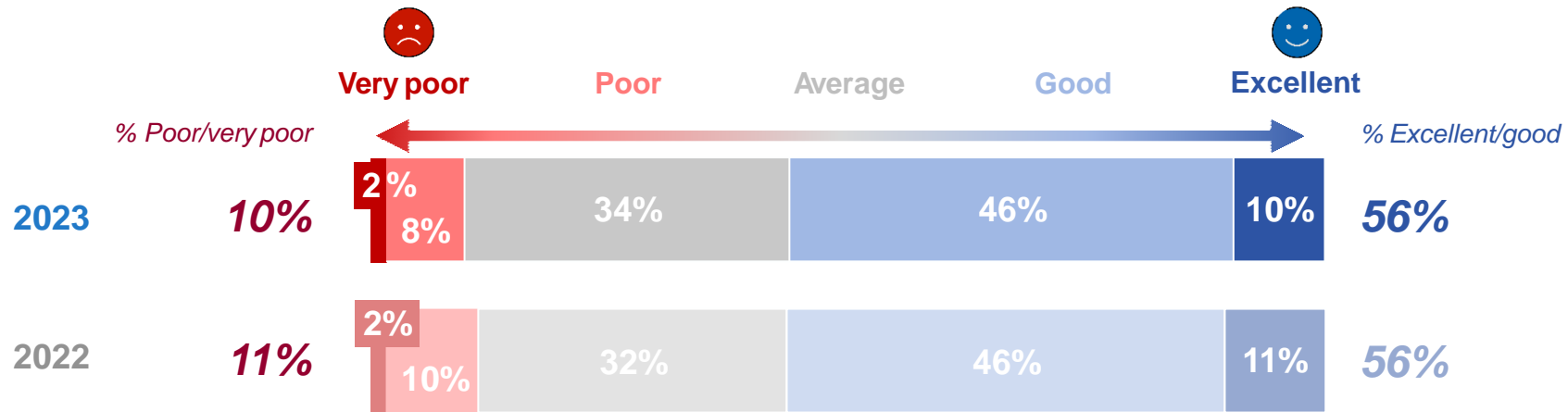
Overall health and wellbeing

Key findings overview:

- Despite a challenging year, overall quality of life was rated good or excellent by over half (56%) of all Australians, consistent with 2022. Finances, followed closely by mental health were the main drivers of perceived quality of life.
- But when compared to 12 months ago, 35%, a significant jump from last year's result of 31%, felt their quality of life had gotten worse
- The core drivers of quality of life and health and wellbeing are the fundamentals: money, physical health, mental health and the food Australians eat.
- Baby Boomers were most inclined to feel they were healthier than the generation before them. Meanwhile generations behind Baby Boomers think they are less healthy.

Consistent with results in 2022, over half (56%) felt their quality of life was excellent/good; 10% felt it was poor

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



Since 2022, there have been no significant differences in overall quality of life.

Those that rated their overall quality of life as **excellent/good** were more likely to be men (59%), full-time workers (60%), or those more financially secure such as those who own their home outright (66%) or higher income households (66% earn \$100k+).

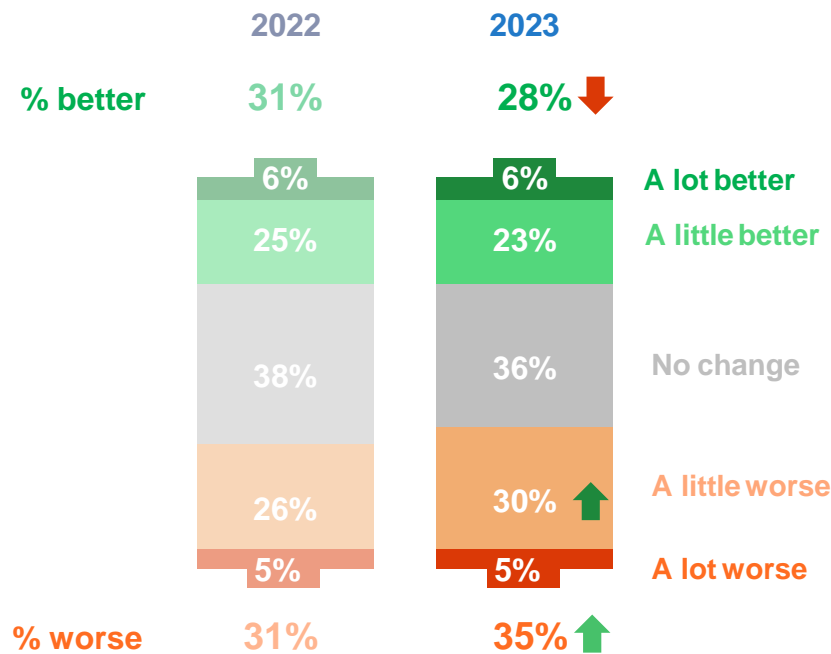
In contrast, those who rated their overall quality of life as **poor** were more likely to live alone (15%), identify as someone with a disability or chronic health condition (17%) or be among those more financially vulnerable such as those renting (17%) or those who were part of lower income households (18% earn under \$50k).

Base All respondents, 2022, n=2,006, 2023 n=2,005.
Q.4. How would you rate your overall quality of life right now?

↑ Denotes significant difference at the 95% level of confidence from 2022
↓

But, compared to 2022, there was a significant decline in perceived quality of life: 35%, up from 31%, think it worsened

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



When reflecting on how their quality of life has changed in the last 12 months, **Australians were more likely to say it had worsened, compared 2022** (31% worse in 2022 vs. 35% worse in 2023).

Perceptions that quality of life had worsened were largely driven by men (from 28% worse in 2022 to 33%), those residing in regional areas (33% to 39%), or among mortgage holders (34% to 39%) or renters (31% to 40%). Not surprising given the pressures of rate rises and rent rises on housing affordability.

Half (48%) of those aged **18-29** felt their quality of life improved over the past 12 months, which was significantly higher than all other age groups.

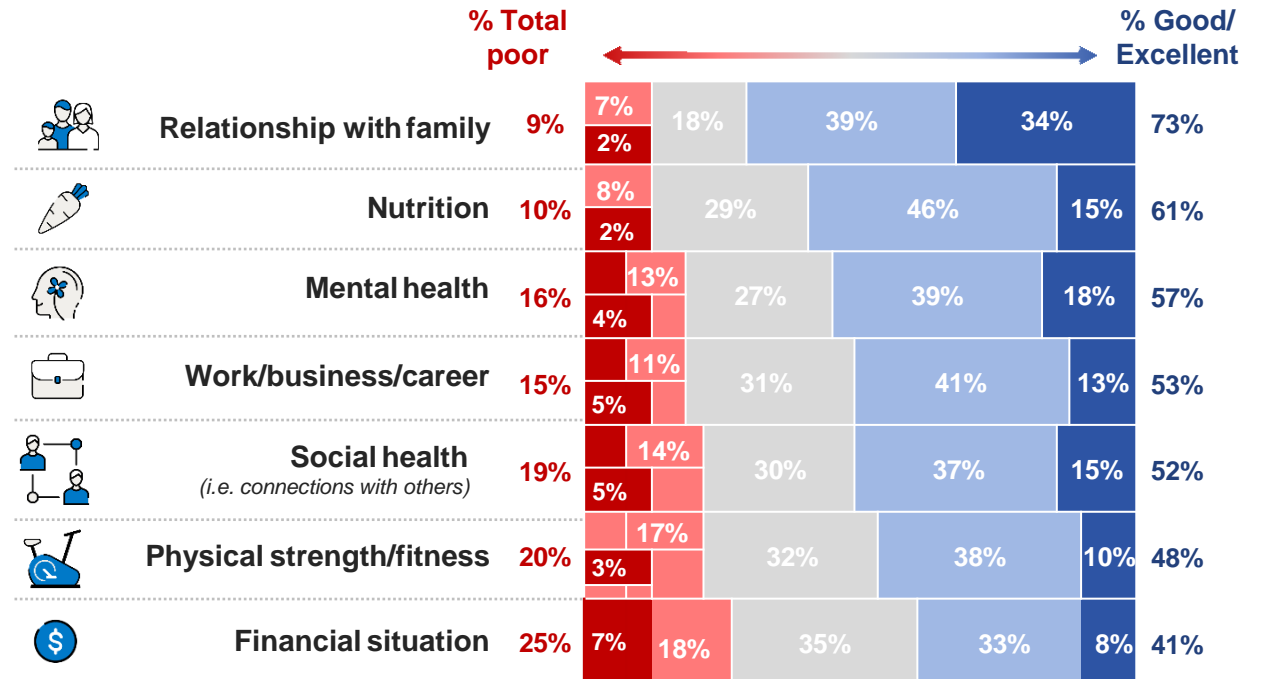
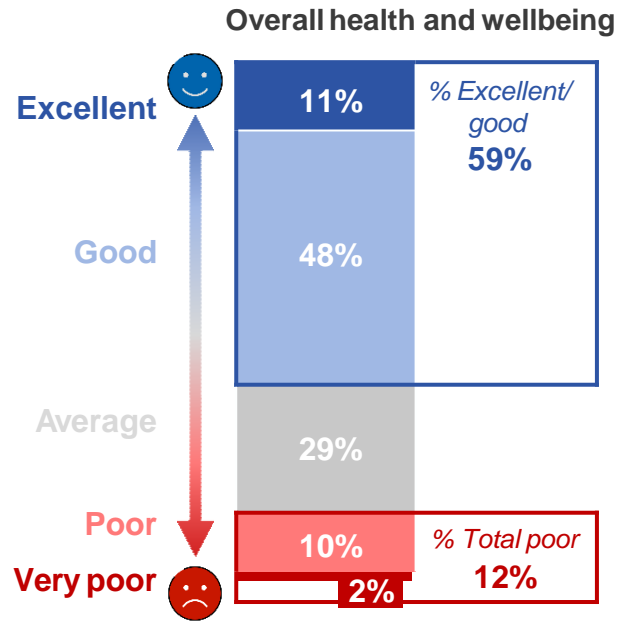
Carers of children under 18 were also more likely to report their overall quality of life as better over the past 12 months than non-carers (32% vs. 27%).

Base All respondents 2022, n=2,006, 2023n=2,005.
Q.5. How do you feel your overall quality of life has changed over the past 12 months? Is it...

↑ Denotes significant difference at the 95% level of confidence from 2022
↓

Consistent with 2022, family relationships rated good/excellent by three in four (73%) while one in four (25%) rated their financial situation as poor

How would you rate the following aspects of your life?



Almost six in ten (59%) Australians rated their overall health and wellbeing as good or excellent – a similar proportion to those believing they have a good quality of life.

Compared to 2022, there have been no significant changes in overall health and wellbeing, or any other metrics.

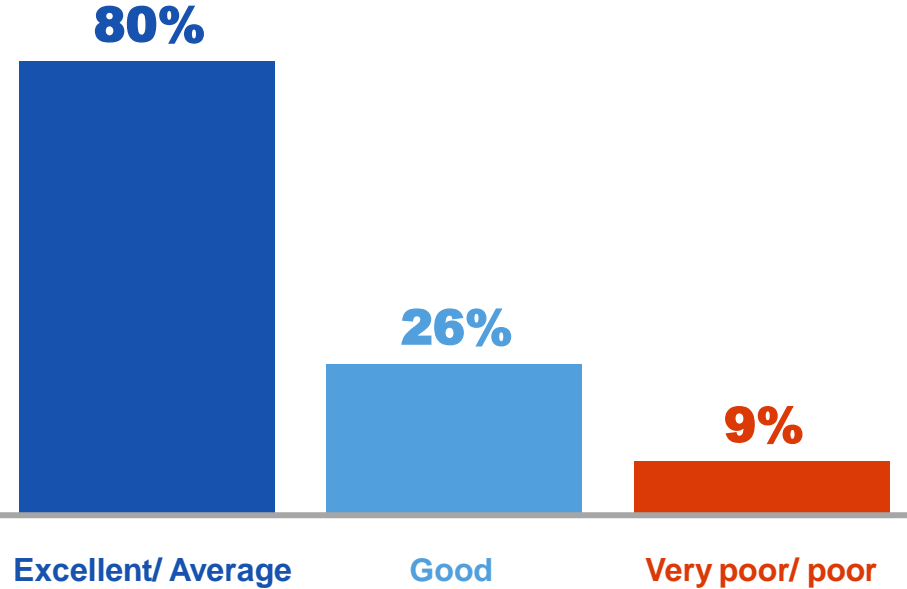
With rising costs financial stress was highest among women (29% total poor vs. 20% men), regional residents (27% vs. 23% metro), renters (40%), low-income households (39% earn under \$50k), those who only speak English at home (26% vs. 18% who do) and those who have a disability or chronic health condition (34%).

It was also highest among those who did not have PHI (35%) which could indicate that finances is a barrier to healthcare.

Those with excellent/good overall health and wellbeing are eight times more likely to think they have a better quality of life

Quality of life and overall health and wellbeing

% rate their overall quality of life as excellent/good



There was a moderately strong correlation* between perceptions of overall quality of life and overall health and wellbeing ($r=0.68$).

*Pearson product moment correlation – values close to 0 show little correlation, while those closer to 1 show high correlation.



Base: All respondents 2023 n=2,005.
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?

Drivers of quality of life: Financial situation & mental health top two at similar levels

Key drivers of overall quality of life

Drivers of overall quality of life in 2022

R-squared: 0.51 (51% of the variability in perceptions of overall quality of life is explained by the regression model)



Drivers of overall quality of life in 2023

R-squared: 0.52 (52% of the variability in perceptions of overall quality of life is explained by the regression model)



Finances and mental health remain the main drivers impacting Australians' perceptions of their overall quality of life.

With persistent inflation over the course of 2023, many Australians have been under significant financial strain, and therefore it is not surprising that finances is now the top driver of perceptions of quality of life.

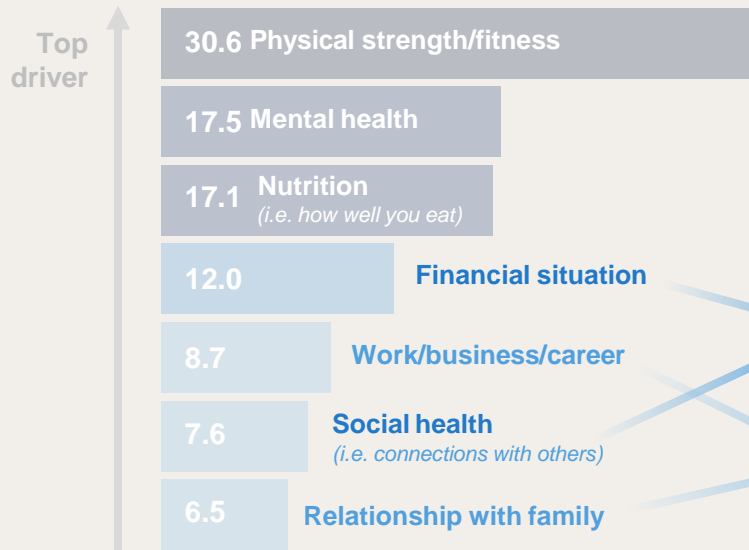
Mental health, followed by social health are secondary drivers impacting perceived quality of life, reaffirming the significance of relationships in life outcomes.

Key drivers of overall health & wellbeing: Physical fitness matters, followed by mental health & nutrition

Key drivers of overall health & wellbeing

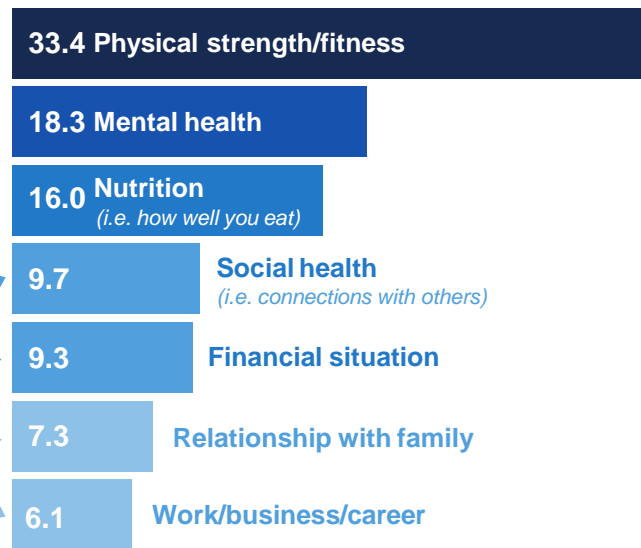
Drivers of overall health and wellbeing in 2022

R-squared: 0.53 (53% of the variability in perceptions of overall health and wellbeing is explained by the regression model)



Drivers of overall health and wellbeing in 2023

R-squared: 0.54 (54% of the variability in perceptions of overall health and wellbeing is explained by the regression model)



Being fit, having positive mental health and ensuring good food are key drivers to better overall health and wellbeing.

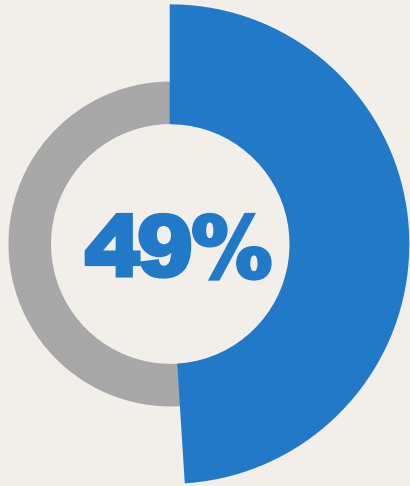
These are consistent with the results in 2022 and speak to the fundamentals of overall health and wellbeing.

However, social health (i.e. connection to others) and relationships with family and friends has risen as drivers, ahead of financial situation and work.

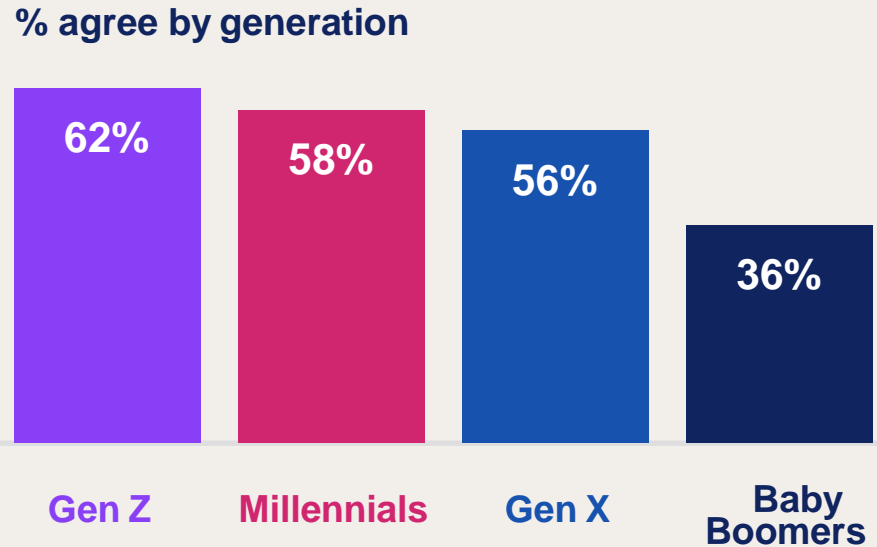
Base: 2022 n=1,467, 2023 n=1,496 cases used in estimation (cases containing missing values have been excluded).

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

Gen Z were most inclined to think their generation is less healthy than the one before it, Baby Boomers were least



agreed that
“their generation is less healthy than the one before it”



More likely to agree were:

- 55% of individuals who were carers of children U18
- 53% of those who reside in a family household
- 53% hold a Bachelor degree or above
- 54% of working individuals
- 60% of those who were unemployed



Base: All respondents 2023 n=2,005. Gen Z (18-24yrs) n=150, Millennials (25-39yrs) n=643, Gen X (40-54yrs) n=521, Baby Boomers (55-79yrs) n=691.

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

Mental health

Summary

- Our connections with those around us remains the key driver impacting mental health in 2023, our finances are now the secondary driver
- Just under three in five (57%) felt they had excellent/good mental health, in contrast one in six (16%) rated their mental health as poor-those younger claimed to be struggling most
- Exercise was the main activity undertaken to improve mental health, followed closely by eating healthy, spending time with family and friends, getting enough rest and spending time in nature
- On par with 2022, (53% of all Australians accessed a form of mental health assistance over the year, with one in three (31%) looking to family or friends for support. Access of mental health support was highest among those aged 18-29 (70%)



Our connections with others remains the key driver impacting mental health in 2023, our finances are now the secondary driver

Key drivers of overall mental health

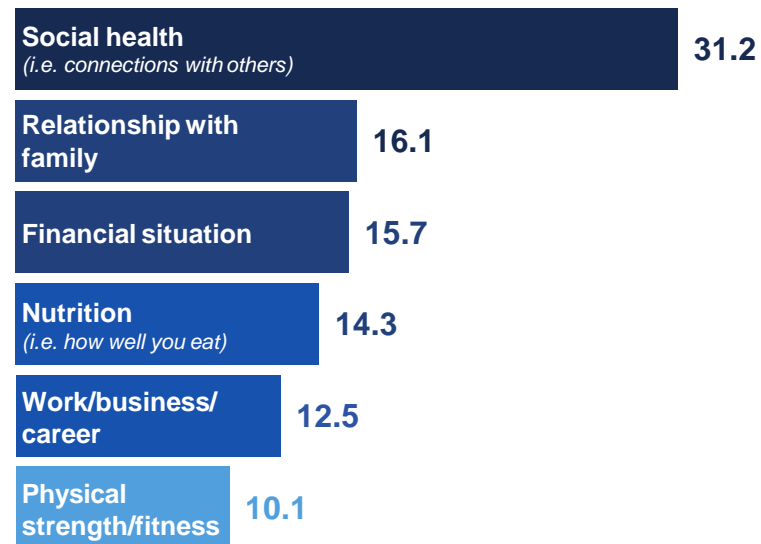
Drivers of mental health quality in 2022

R-squared: 0.49 (49% of the variability in perceptions of overall quality of life is explained by the regression model)



Drivers of mental health quality in 2023

R-squared: 0.47 (47% of the variability in perceptions of overall quality of life is explained by the regression model)



While social health remains the top and by far largest driver of mental health (contributes 31.2% to mental health), our finances is now a secondary driver alongside relationships with family.

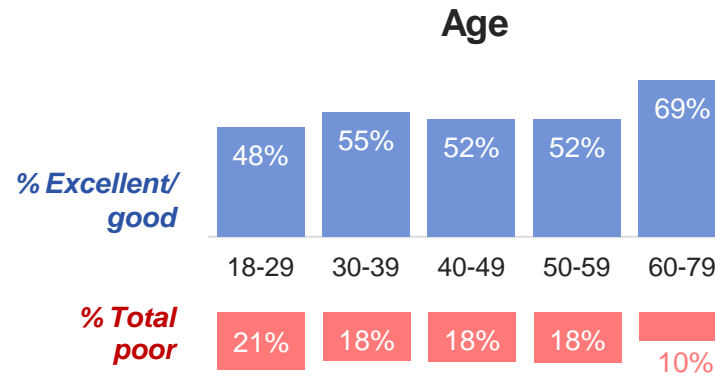
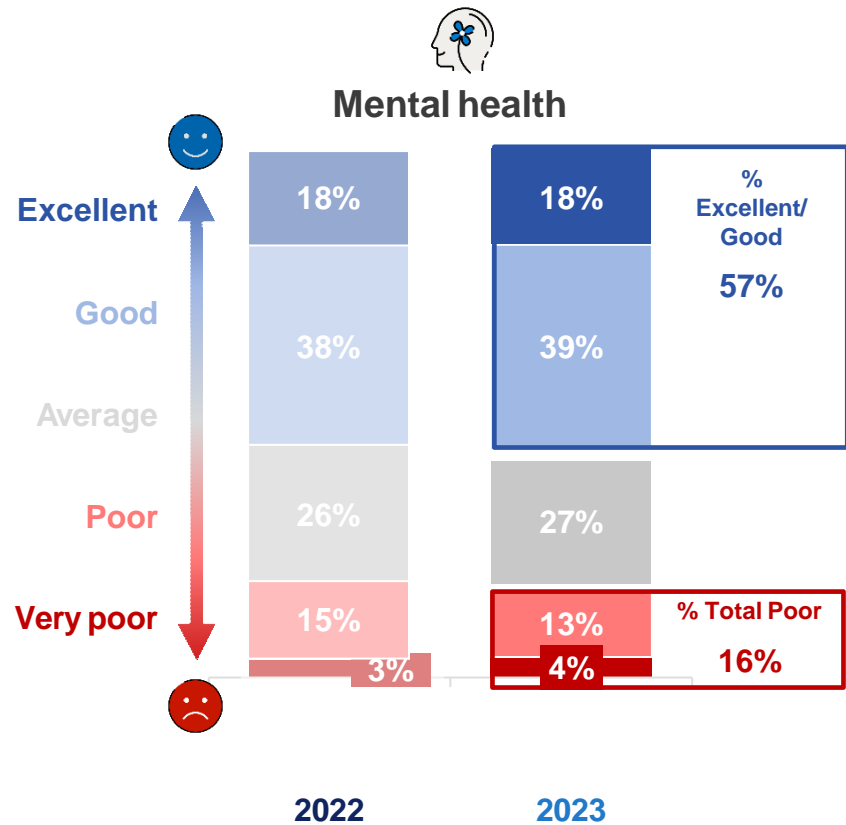
This shows the cost of living situation is now spilling over to impact our mental health. In particular, financial situation is now a close secondary driver among those younger, **aged 18-29** (contributes 22.6% behind social health 24.06% to mental health).

Base: 2022 n=1,467, 2023 n=1,496 cases used in estimation (cases containing missing values have been excluded).

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

One in six (16%) Australians rated their mental health as poor, highest among those aged 18-29

How would you rate the following aspects of your life?



Since 2022, there have been no significant differences in overall mental health, and perceptions of mental health appear to remain correlated with age, where one in five (21%) Australians aged under 30 felt their mental health was poor.

Women (52% good/excellent vs. 61% for men), those who are **unemployed** (41%), **renting** (47%) and are part of a household that **earns less than \$25k** (43%) are also significantly less likely to rate their mental health as good/excellent.

Those who **live alone** (20% very poor/poor), **rent** (22%), **only speak English** at home (17% vs. 11% speak another language) and those who have a **hidden disability** (31%) or **chronic health condition** (24%) were most inclined to rate their mental health as poor.

Base: Base: All respondents 2023 n=2,005. 18-29 (n=429), 30-39 (n=364), 40-49 (n=358), 50-59 (n=317), 60-79 (n=537). Note: n/a removed
 Q.6. How would you rate the following aspects of your life?

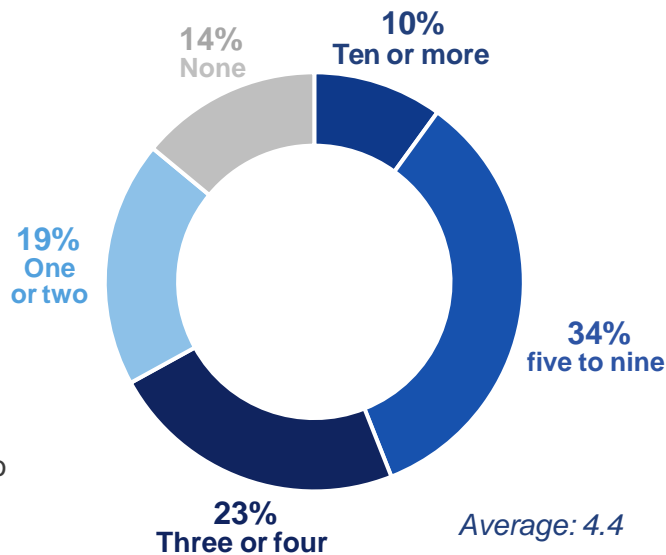
Two in five Australians (43%) took five or more actions to improve their mental health in the past year – exercise was no. 1

Number of activities undertaken to improve mental health

Older Australians aged 60-79 years old were more likely to do no activities than all other age groups respectively. Similarly, **men** reported doing none to a higher extent than women (18% vs. 11%).

On average Australians undertook 4-5 activities, **where those with a mental health condition** undertook an average of 6 activities.

Workers were also more likely to have undertaken a higher number of activities (4.7 average).



Base: All respondents 2023 n=2,005
Q.8.a. Which of the following (if any) have you undertaken to improve your mental health in the past 12 months?

Activities undertaken to improve mental health in the past 12 months



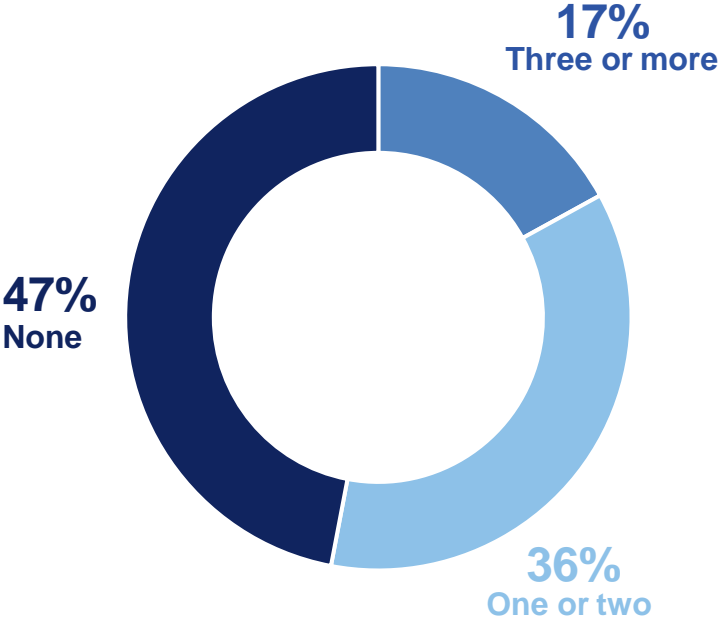
One in ten Australians (10%) sought **online help** through online mental health programs and mindfulness/mental health apps.

This was highest among those younger (15% aged under 40, 11% aged 40-59 and 4% aged 60-79), as well as those who were parents/ guardians of children aged under 18 (14% vs. 9% were not), full time workers (15%) and those with a hidden disability (14%) or a mental health condition (19%).

On par with 2022, half (53%) of all Australians accessed a form of mental health assistance over the year, with one in three (31%) looking to family or friends for support

Formal and informal mental health assistance

Number of mental health sources accessed



Services accessed for mental health assistance in the past 12 months



Over two in three (70%) Australians aged 18-29 sought out mental health assistance over the last 12 months, which was significantly higher than all other age groups, only one in three aged 60-79 did the same (35%).

Those who are carers of children aged under 18 utilised mental health assistance more often than non-carers (62% vs. 50%).

Outside of friends and family, two in five (41%) Australians accessed a more formal form of mental health assistance over the past year.

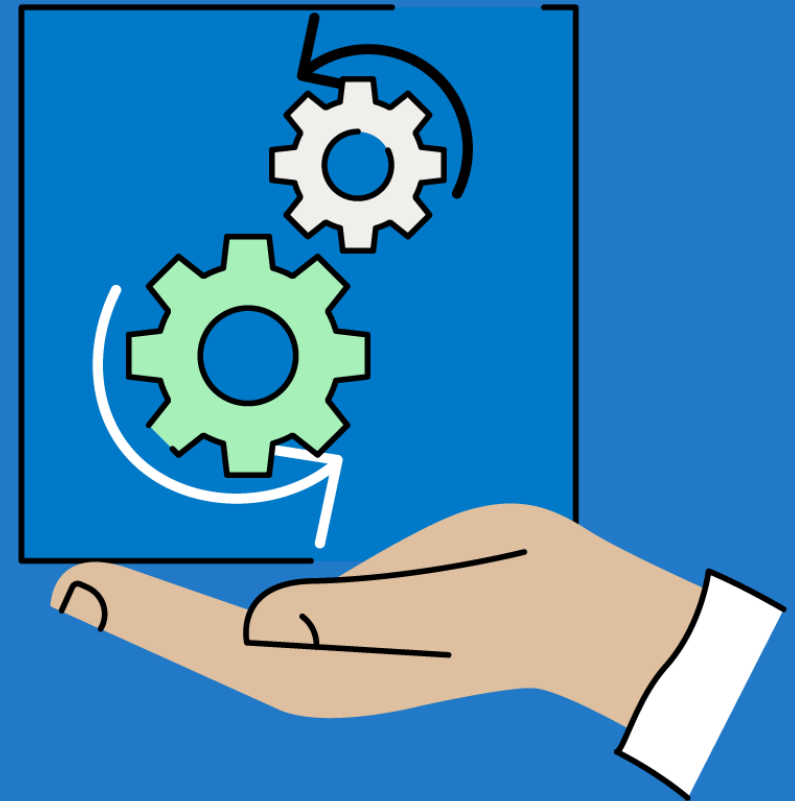
There have been no significant changes in number of mental health sources accessed, or which services were accessed, since 2022.

Base: All respondents 2023 n=2,005
 Q.8. Have you used any of the following for mental health assistance in the past 12 months?

Drivers, barriers to maintaining good health & future outlook

Summary

- Routine, reward, preparation, buddies and goals support Australians to successfully manage their health and wellbeing
- But, two in five (38%) find it difficult to manage
- Cost, lack of motivation and time were main barriers. Women were more inclined to mention intimidation and family commitments as barriers
- Fear about developing chronic illnesses, with cancer top of the list, was widespread (65%)



Routine, reward, preparation, buddies & goals help Australians successfully manage their health & wellbeing

What has helped you to successfully manage your health and wellbeing?



Building health and wellbeing into their routine was the most significant way Australians claimed it helped them to successfully manage their health and wellbeing (29%).

Individuals aged 18-39 were significantly more likely to take action to manage their health and wellbeing than older generations (88% vs. 73%).

In comparison to men, women were more inclined to prepare their meals in advance (30% vs. 20%), find fun/enjoyable fitness alternatives (21% vs. 17%) and monitor their health through app/wearable (20% vs. 16%).

Carers of children aged under 18 were more proactive with their health and wellbeing than non-carers (85% vs. 76%).

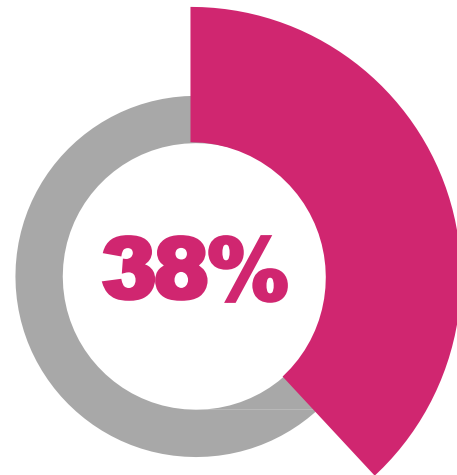
Three quarters (76%) of those with a disability or chronic/long-term health condition had taken some sort of action to manage their health and wellbeing.

Base: All respondents 2023 n=2,005, 2022 n=2,006.

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

↑ Denotes significant difference at the 95% level of confidence from 2022
 ↓

On par with 2022, just under two in five Australians (38%) were struggling to manage their health and wellbeing



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

Agreement was highest among those who felt their financial situation was poor (51% vs. 30% excellent/good), where those who agreed also felt their biggest barrier to looking after their health and wellbeing was cost (51%). This may be indicative of financial pressures contributing to barriers for Australians to manage their health and wellbeing.

There have been no significant change in agreement compared to this time last year.

More likely to agree in 2023 were:

- 57% of individuals with mental health conditions
- 52% of those aged 18-29 years old
- 50% of those residing with friends/housemates
- 47% of carers of a child under 18
- 53% of students
- 49% of those renting

Cost remains a key hurdle for Australians when maintaining their health and wellbeing

Cost and lack of motivation remain the biggest barriers for Australians.

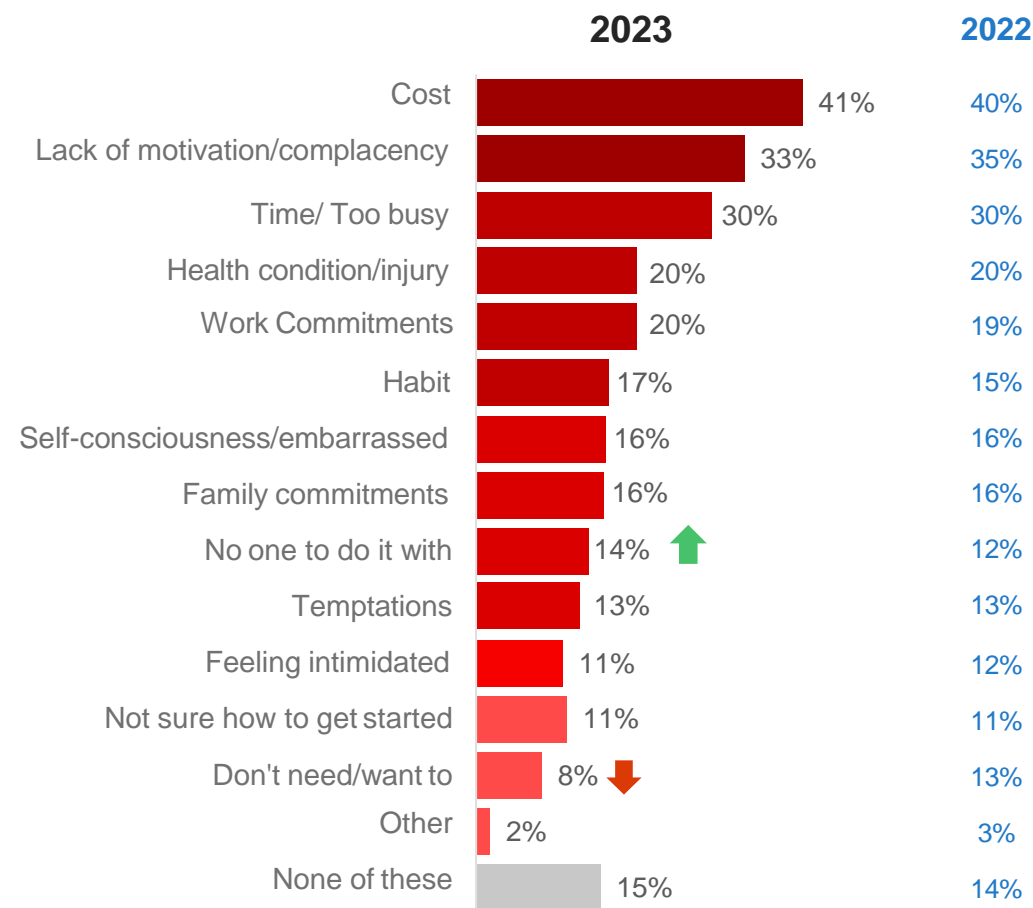
Cost was a barrier for almost half of those aged under 50 years (45%).

When compared to 2022, most results were consistent other than an uptick on not having a ‘buddy’ as a hurdle to maintaining health and wellbeing.

Generally, **women** mentioned a higher number of barriers than men. Key barriers for women included cost (48% vs. 34%), motivation (37% vs. 30%), feeling self-conscious/embarrassed (18% vs. 14%), family commitments (18% vs. 14%), no one to do it with (16% vs. 12%), and feeling intimidated (12% vs. 9%).

Those with caring responsibilities for children aged U18 were more likely to mention cost (45% vs. 39%), time (46% vs. 23%), and family commitments (32% vs. 9%) as barriers.

Barriers to maintaining health and wellbeing

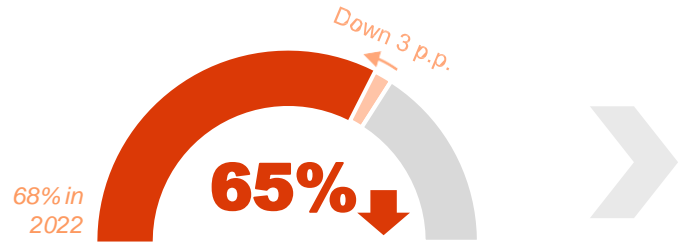


Base: All respondents 2023 n=2,005, 2022 n=2,006.

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)?

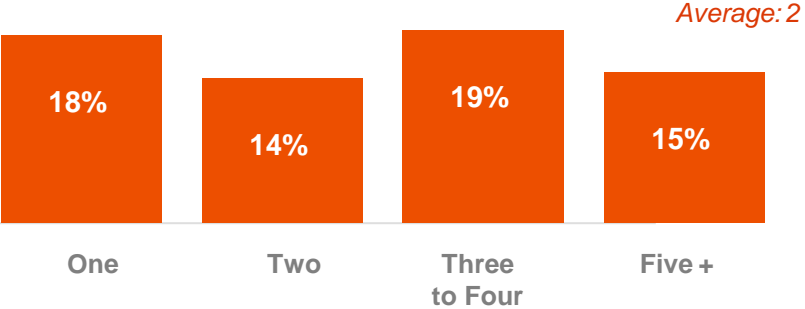
↑ Denotes significant difference at the 95% level of confidence from 2022
 ↓

Two in three (65%) were concerned about developing a chronic illness

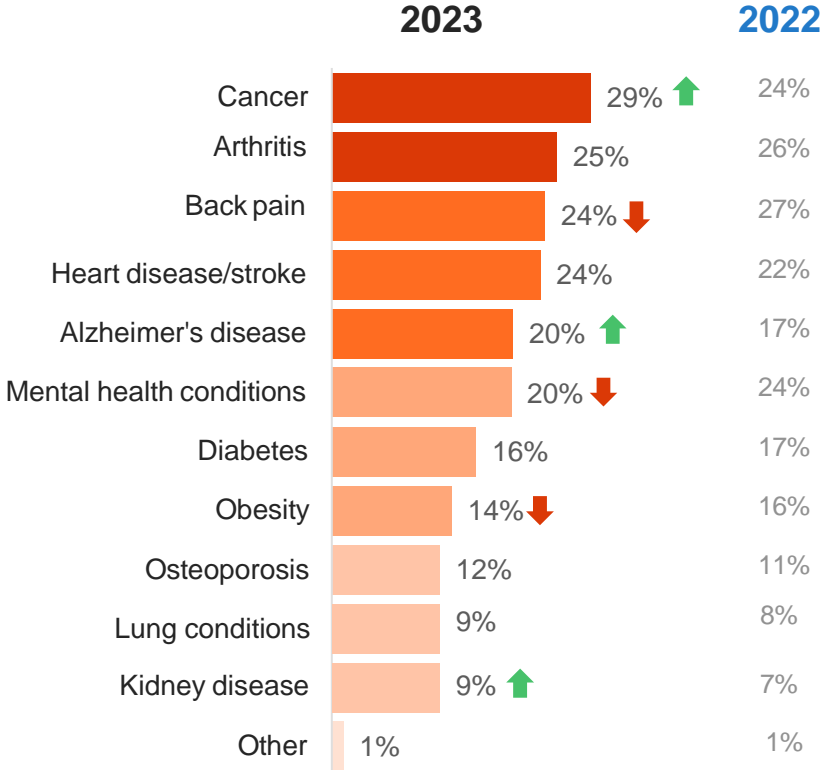


of Australian adults were concerned about developing a chronic illness

Number of chronic illnesses concerned about



Chronic illnesses concerned about



Top of the concerns about developing a chronic condition was cancer (29%) followed by arthritis (25%) and back pain (24%).

Concern changes with age, with younger Australians (18- 29) significantly less likely to be concerned overall about developing a chronic condition but once over 40 , this shifts (52% vs. 71%).

However, younger Australians were more likely to be concerned about developing a mental health condition (24%) compared to over 40s (19%).

Base: All respondents 2023 n=2,005, 2022 n=2,006.
Q.15. Are you concerned about developing any of the following chronic conditions?

↑ Denotes significant difference at the 95% level of confidence from 2022
↓

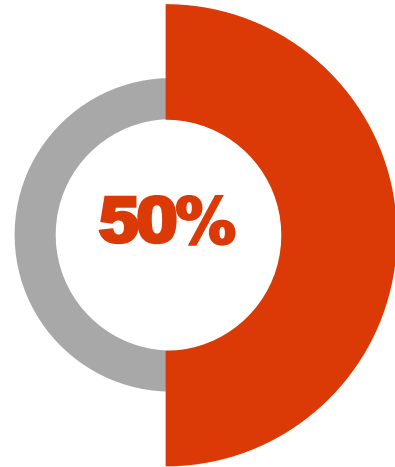
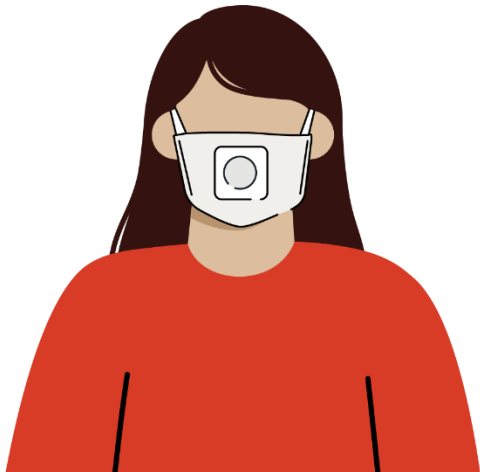
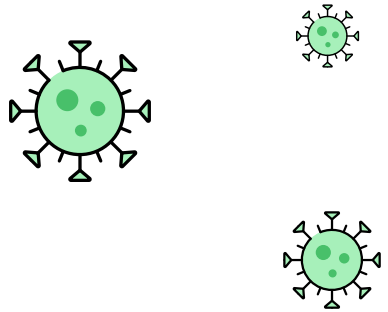
Health-related behaviours and intentions

Summary

- A pandemic hangover persists – 50% still hold concerns about future pandemics and their impact on their health and wellbeing
- Most Australians don't practice self care. In 2023, Australians were more focused on their health and wellbeing with an increased number changing behaviour on a range of fitness behaviours, reducing alcohol, taking vitamins etc.
- Low participation in team sports, especially among women and those with a disability or chronic health condition



Pandemic hangover with half still concerned about the impact of future pandemics on their health and wellbeing



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

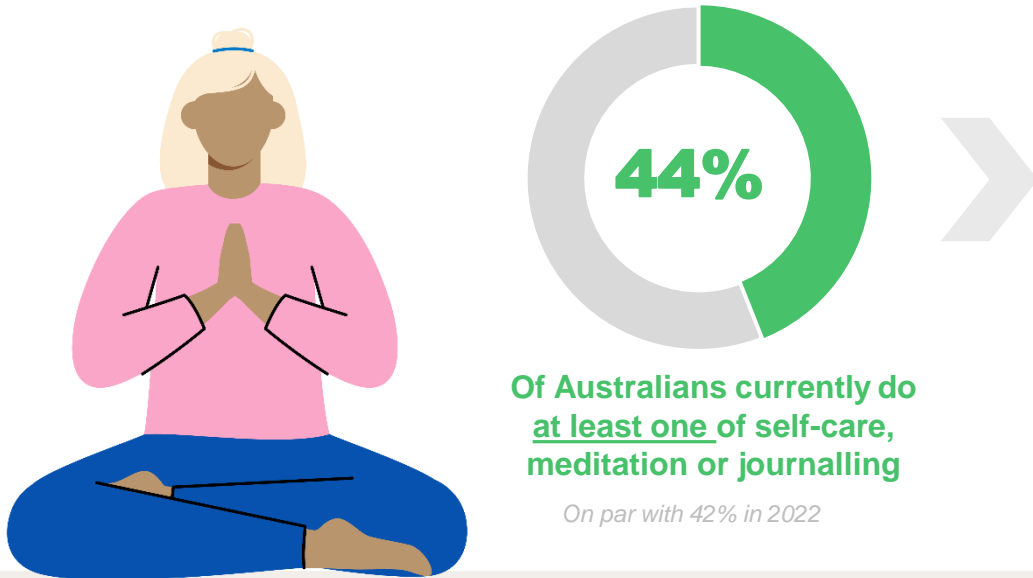
Despite a move away from the pandemic, half of all Australian adults agreed they were concerned about the impact of future pandemics on their health and wellbeing (from 52% to 50%), with only a significant drop in the proportion who strongly agreed (from 11% strongly agreed in 2022 to 9%). Pointing to a lingering apprehension.

More likely to agree in 2023 were:

- **54%** agreed among 30-39 year olds, as well as 50-59 year olds respectively
- **64%** of those residing in ACT
- **54%** have a Bachelor degree or higher
- **55%** of renters

Self care not practiced by a majority: only just over two in five (44%) undertake some form of self-care

Behaviours and intentions – Self-care



	Neither	Not doing, but would like to	Currently doing	
Undertook self-care (e.g. facial, manicure)	2023	45% ↓	22%	32%
	2022	48%	20%	32%
Meditated regularly	2023	59%	27%	15%
	2022	60%	25%	15%
Practised gratitude/journalling	2023	67% ↓	19%	14%
	2022	70%	17%	12%

Australians were not strong on self care with only two in five (44%) undertaking at least one form of self care. Those more likely to do so were **aged 18- 29 (55%), women (55%), a metropolitan resident (46%), have PHI (46%), a parent/guardian of those under 18 (49%), have a household incomes of \$100k or more (49%) or speak a language other than English at home (51%).**

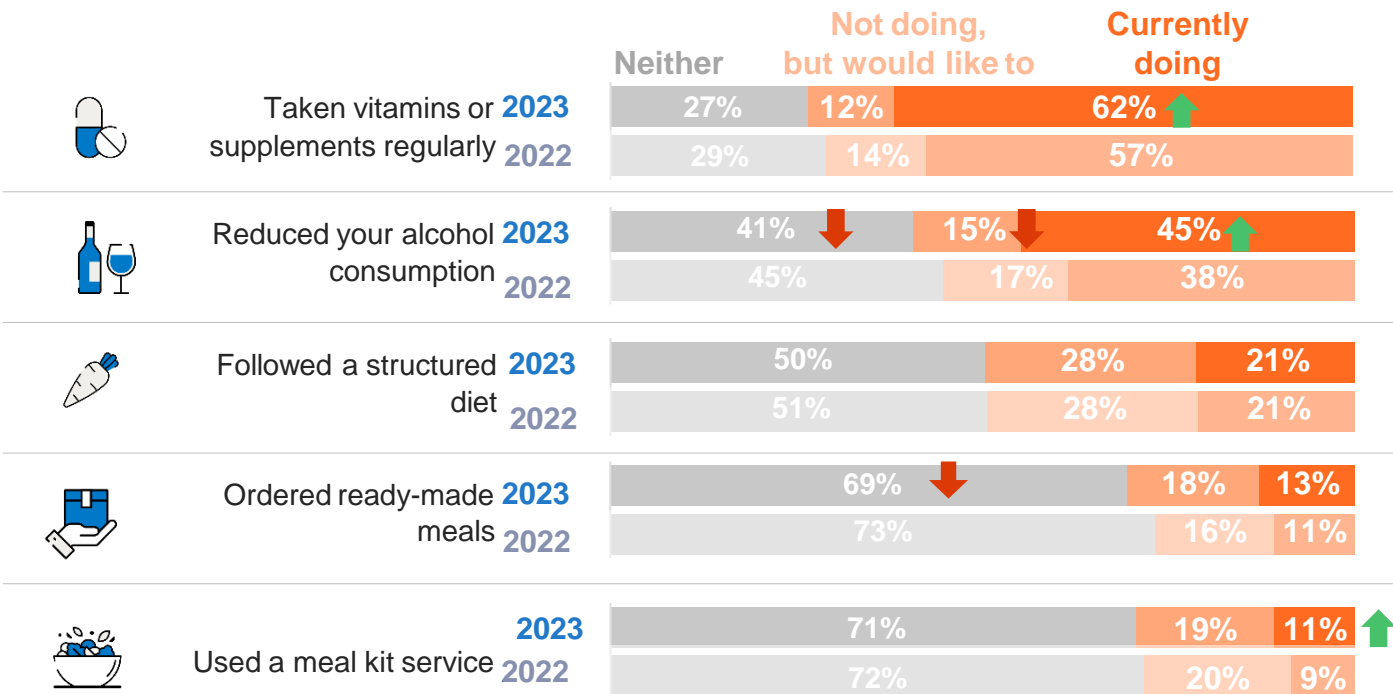
In terms of specific behaviours, only a third (32%) were undertaking physical self care such as a facial or manicure (which arguably could be linked to image/ appearance), consistent with 2022. Mental self care with behaviours such as meditation or practicing gratitude/journalling were relatively on par with 2022 results, but more Australians had a desire to/were currently practicing journalling and gratitude in 2023.

Base: All respondents 2023 n=2,005
 Q.7. Which of the following (if any) do you currently do, or have you done in the past 12 months?

↑ Significant drop/climb from 2022
 ↓

Australians were more likely to take vitamins/supplements regularly, reduce their alcohol intake or using a meal service kit

Behaviours and intentions – Nutrition and eating/drinking



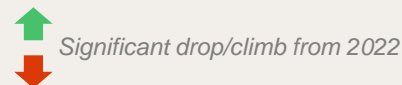
Compared to 2022, Australians were significantly more likely to claim to be reducing their alcohol intake.

Taking vitamins or supplements regularly (57% vs. 62%) and using meal kit services (9% vs. 11%) also showed significant upticks in claimed behaviour.

Ready-made meals were more likely to be in the repertoire of Australians, possibly as a mechanism to reduce waste and manage costs.

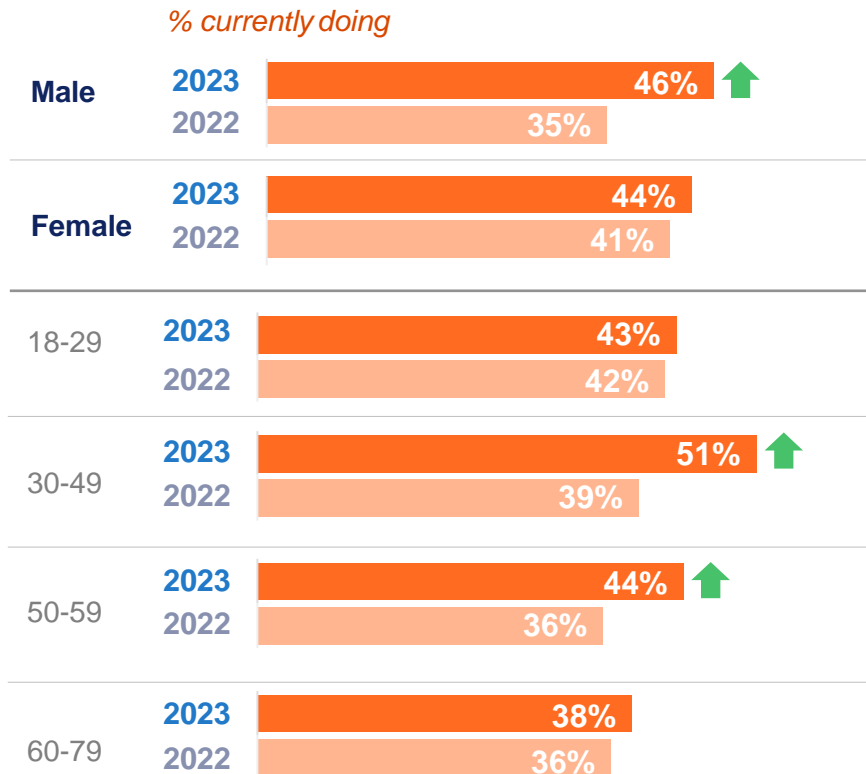
18-29 year olds were significantly less likely to claim to be taking vitamins or supplements regularly than those 30+ (53% vs. 64%).

Base: All respondents 2023 n=2,005, 2022 n=2,006.
Q.7. Which of the following (if any) do you currently do, or have you done in the past 12 months?



Australians were more likely to claim to be cutting back on alcohol in 2023, driven by men or those aged 30-59

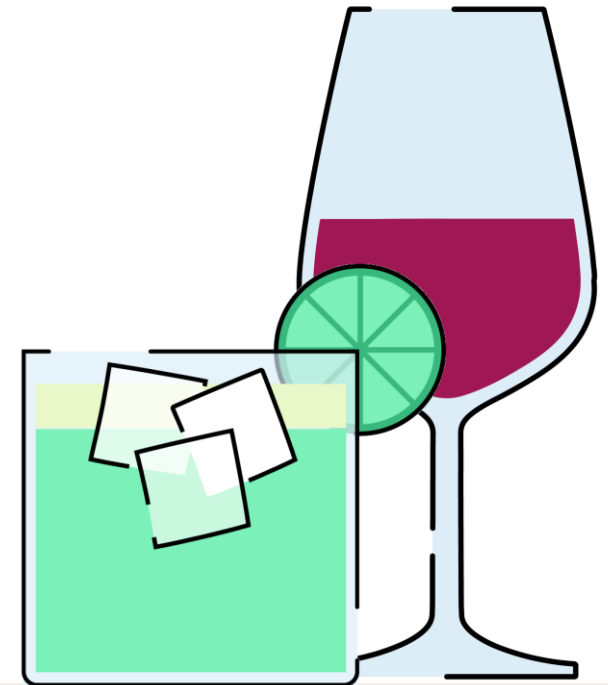
Behaviours and intentions – Reduced your alcohol consumption



Along with men, it appears that **the middle generations (30-59 years old)** were driving the **year-on-year increase** in reduction of alcohol consumption.

Additionally, reducing alcohol was significantly more likely among those that **live in a family household with the youngest under 13 years old** (53% vs. 43% of other households) or those with **household incomes of \$150,000 or more** (54% vs. 43% other household income brackets).

Individuals with a **mental health condition** were also more likely to have reduced their alcohol intake than those who do not identify as having a disability or chronic/long-term health condition (52% vs. 43%).



Base: All respondents 2023 n=2,005, 2022 n=2,006.
Q.7. Which of the following (if any) do you currently do, or have you done in the past 12 months?

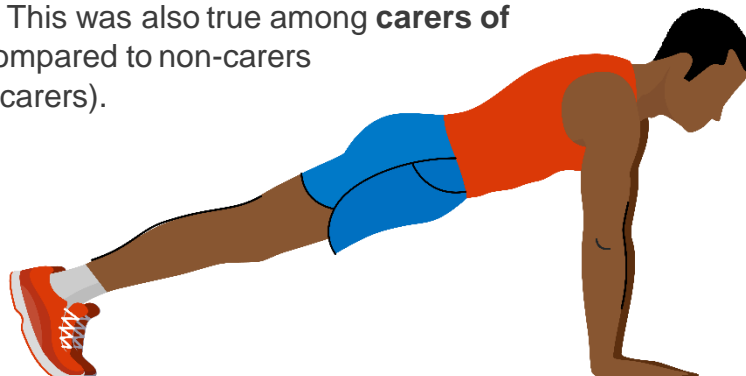
↑ Significant drop/climb from 2022
↓

Aussies were increasingly doing, or aspiring to do, more fitness activities in 2023 compared to 2022

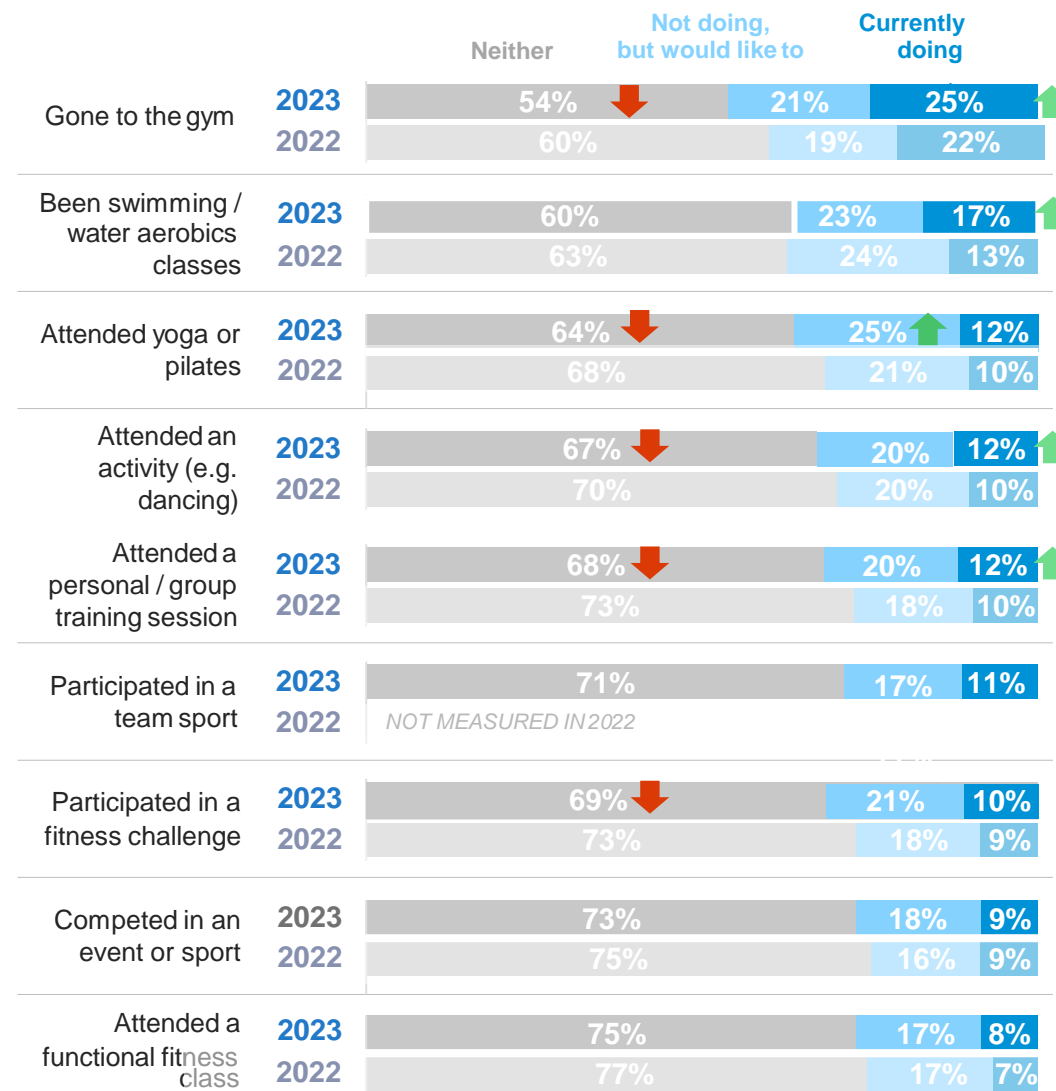
In 2023, health and fitness saw an uptick with Australians more likely to claim they were going to the **gym** (25% vs. 22% in 2022), **swimming/ water aerobics classes** (17% vs. 13%), attending **an activity** (12% vs. 10%), or a **personal/group training session** (12% vs. 10%).

Compared to the older age brackets, **18-29 year olds** were significantly more likely to go to the gym (42%), compete in an event or sport (17%), or be a member of a class partnership app (12%).

For the fitness activities overall, **individuals with PHI** were significantly more likely to currently be active than non-considerers of PHI (overall 58% with PHI vs. 31% non-considerers of PHI). This was also true among **carers of children aged under 18** when compared to non-carers (overall 59% carers vs. 44% non-carers).



Behaviours and intentions – Fitness activities



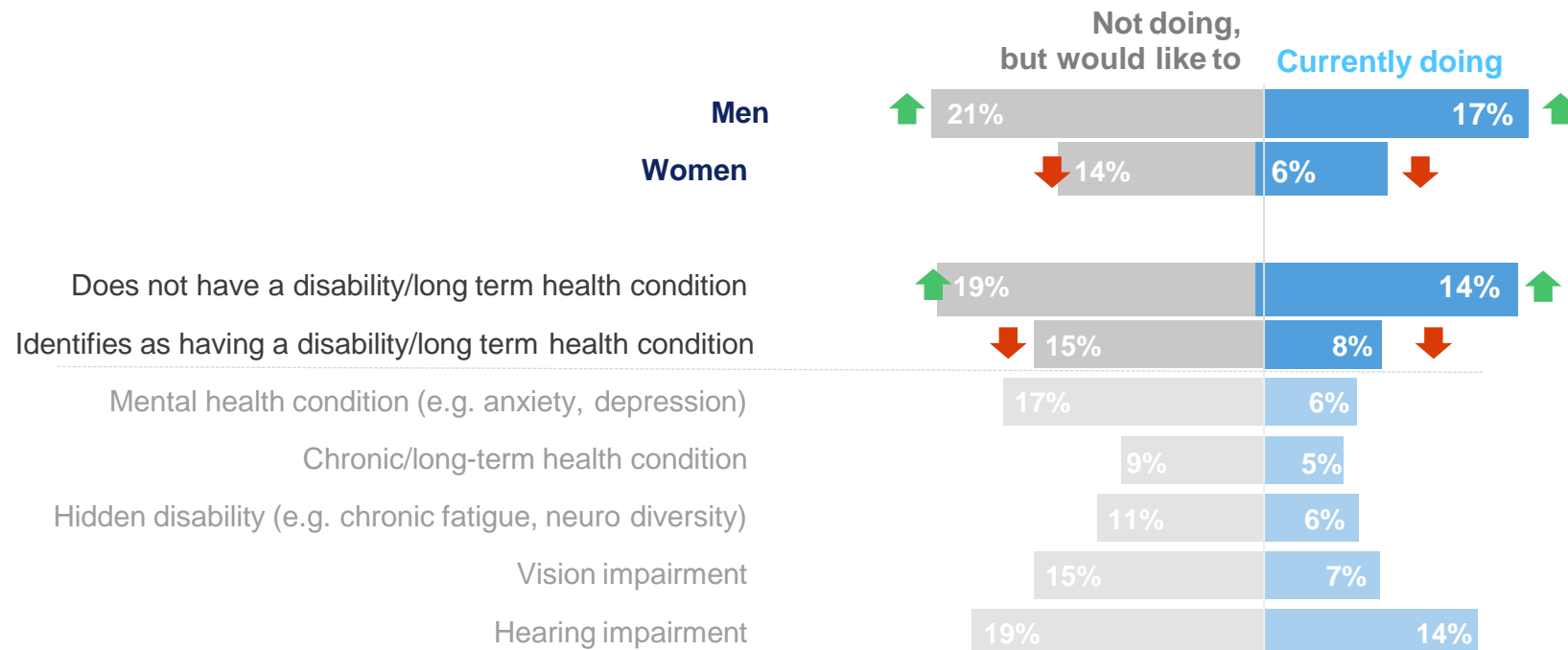
↑ Significant drop/climb from 2022
↓

Base: All respondents 2023 n=2,005, 2022 n=2,006.

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

Participation in team sport highest among men; lowest among women or those who identify as having a disability or health condition



Behaviours and intentions – Participated in a team sport (e.g., soccer, netball, football, etc.)



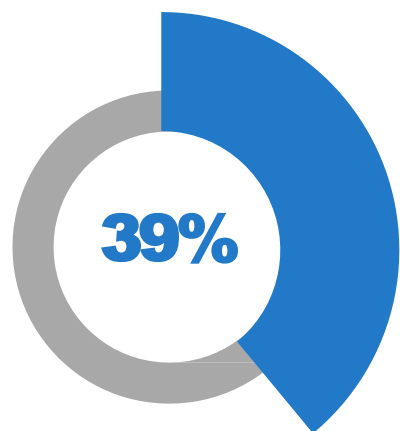
Only one in twenty women (6%) compared to one in six men (17%) participated in a team sport, despite 14% of women not doing so but wanting to.



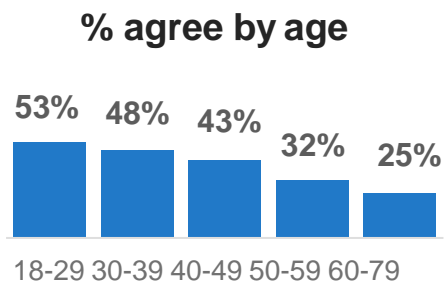
Base: All respondents 2023 n=2,005; Male n=998, Female n=1,004; Yes – all people with a disability n=884, Yes - a mental health condition n=435, Yes - a chronic/long-term health condition n=307, Yes - a hidden disability n=256, Yes - a vision impairment n=167, Yes - a hearing impairment n=122, Yes - another type of disability n=115, None of the above n=1099.
 Q.7. Which of the following (if any) do you currently do, or have you done in the past 12 months?

 Significant drop/climb from 2022


The eagerness to explore new trends in health and wellbeing declined with age



Agreed they are someone who likes to explore new trends and try new things in health and wellbeing



While there has been no significant shift in the proportion who agreed they like to explore new things in health and wellbeing (37% agreed in 2022), the proportion who strongly disagreed significantly dropped (from 17% to 11% in 2023).

Younger Australians (18-29) were most likely to agree suggesting targeting of experimenting with new ideas for health & wellbeing starts with this audience.

More likely to agree were:

- 40% of those residing in metropolitan areas
- 43% have PHI
- 50% live with friends/housemates
- 51% live with a family with kids 5 years or younger
- 47% parents of a child under 18
- 47% bachelor degree or higher
- 45% are working
- 41% renters
- 46% higher income households (earn over \$100k)
- 50% speak a language other than English at home



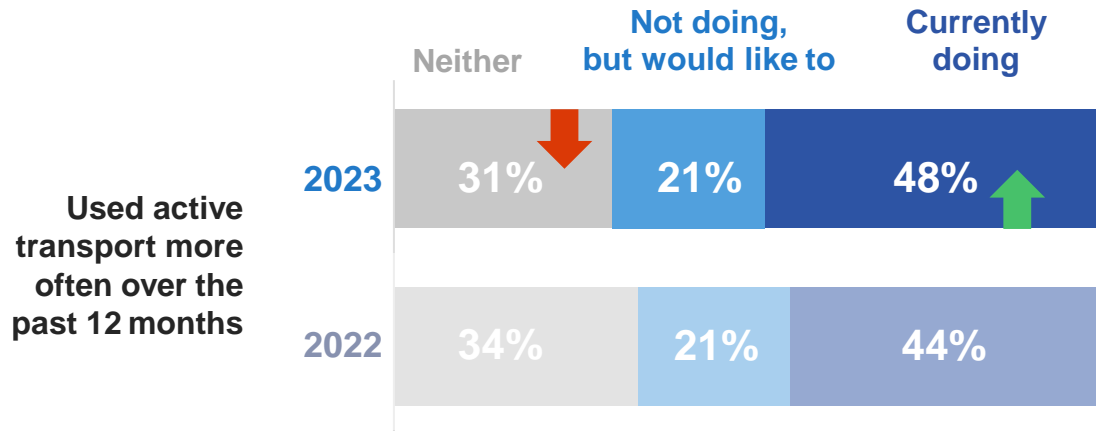
Active transport and running

- Australians were using active transport more often in 2023 (48% from 44% in 2022), where four in five (78%) walked weekly, one in five (21%) ran weekly, and one in seven (14%) cycled weekly
- Overall there was a large take-up of running in 2023, where one in ten (10%) Australians took up weekly running within the last year
- Women took up running as it addressed many barriers to looking after their health and wellbeing



Australians more likely to have used active transport in 2023, with half saying they cycle, walk or run more often

Behaviours and intentions – Active Transport





Compared to 2022, Australians were significantly more likely to state they were using active transport (48% vs. 44% in 2022).

Those that used active transport more often over the last 12 months were more likely to be **men** (52%), have **PHI** (51%), **not have a disability** or chronic/long-term health condition (51%), **have a Bachelor degree or higher** (54%), **own their own home** (outright or with a mortgage, 50%), **have a household income of \$150k or more** (56%) or **speak a language other than English at home** (58%).

Those who weren't currently using active transport but would like to were more likely to be aged **18-29** (29%), **have a family household with kids aged 12 or under** (28%), be a **parent or guardian** of any children aged under 18 years (26%), or **live in public housing** (32%).

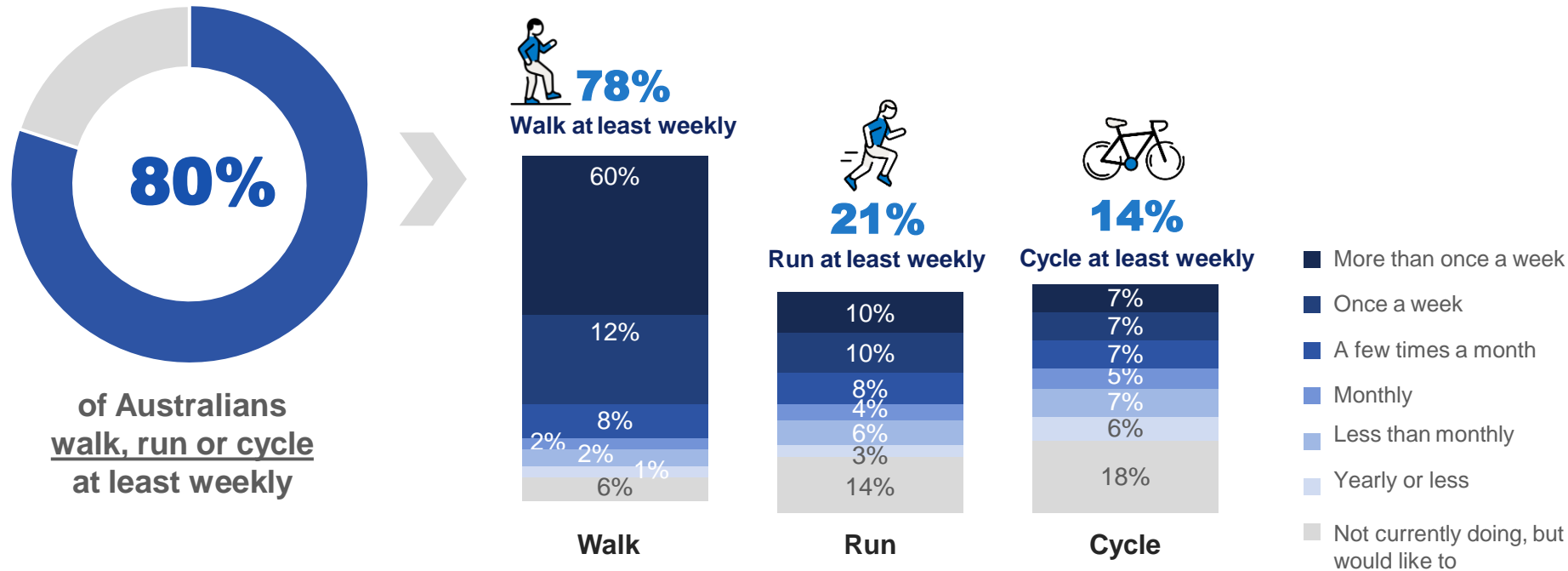


Base: All respondents 2023 n=2,005, 2022 n=2,006.
Q.7. Which of the following (if any) do you currently do, or have you done in the past 12 months?

 Significant drop/climb from 2022


Four in five (80%) Australians claimed to walk, run or cycle at least weekly, one in five (21%) claimed to run at least weekly

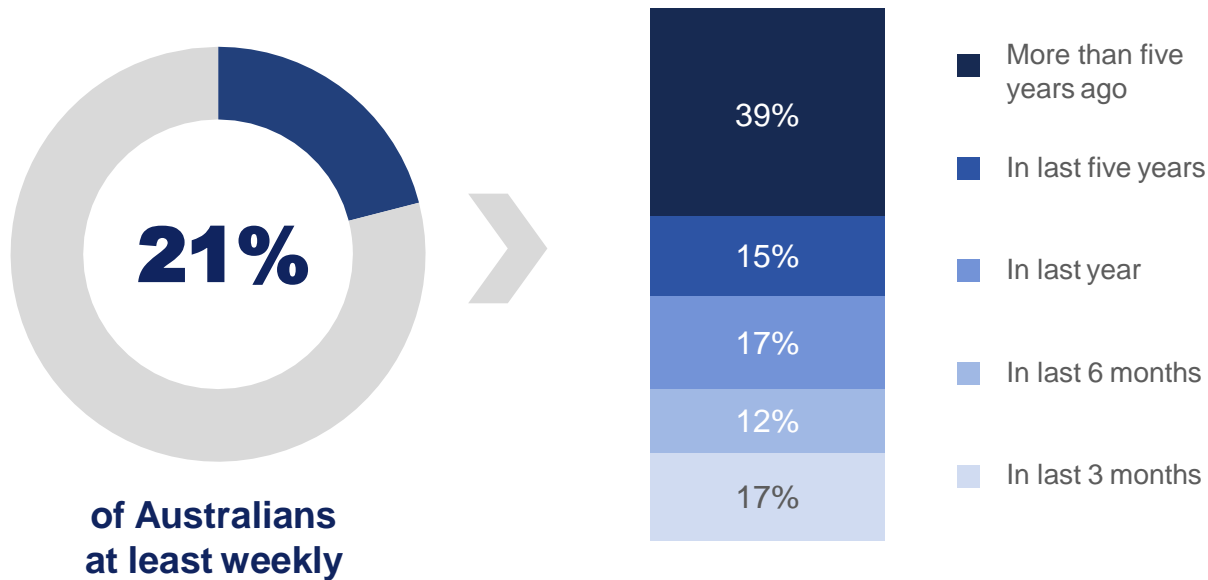
Behaviours – Walking, Running, Cycling



Those who claimed to run at least weekly were more likely to be under 40 (34% run at least weekly), male (27%), have PHI (25%), not have a disability or chronic/long-term health condition (26%), be a parent or guardian of any children aged under 18 years (26%), have a Bachelor degree or above (29%), have a household income of \$150k or more (34%) or speak a language other than English at home (32%).

Growth in running: 10% Australians took it up in the last year. In contrast, 8% had been running for over 5 years

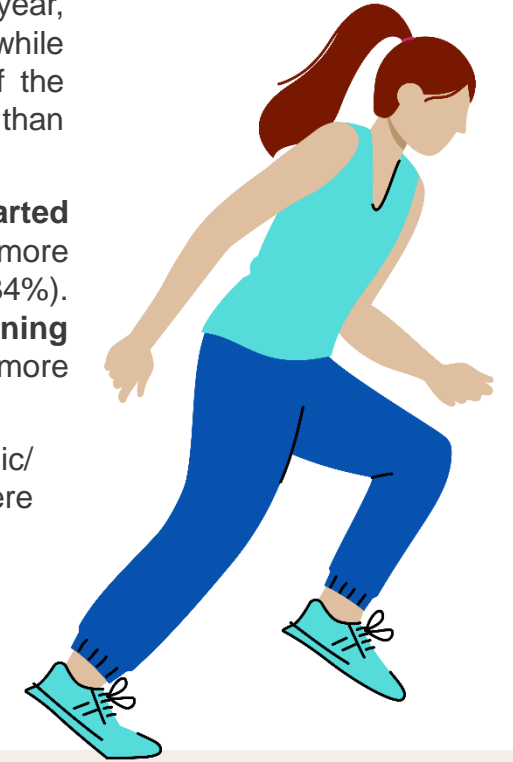
When running was taken up – Those who run weekly or more often



Of those who run weekly, just under half were new runners (46% last year, equivalent to 10% of all Australians), while two in five (39%, equivalent to 8% of the adult population) began running more than five years ago.

As to be expected, those who started running in the last 6 months were more likely to be younger, aged 18-29 (34%). While those who had been running for more than five years were more likely to be aged 40+ (54%).

Those with a disability or a chronic/long-term health condition were more likely to not run weekly.



Two thirds of those who run weekly or more do so to improve their health and fitness (66%)

Those who started running in the last 6 months were more likely to cite social reasons for running, such as feeling part of a community (15%) and for a cause/charity (10%).

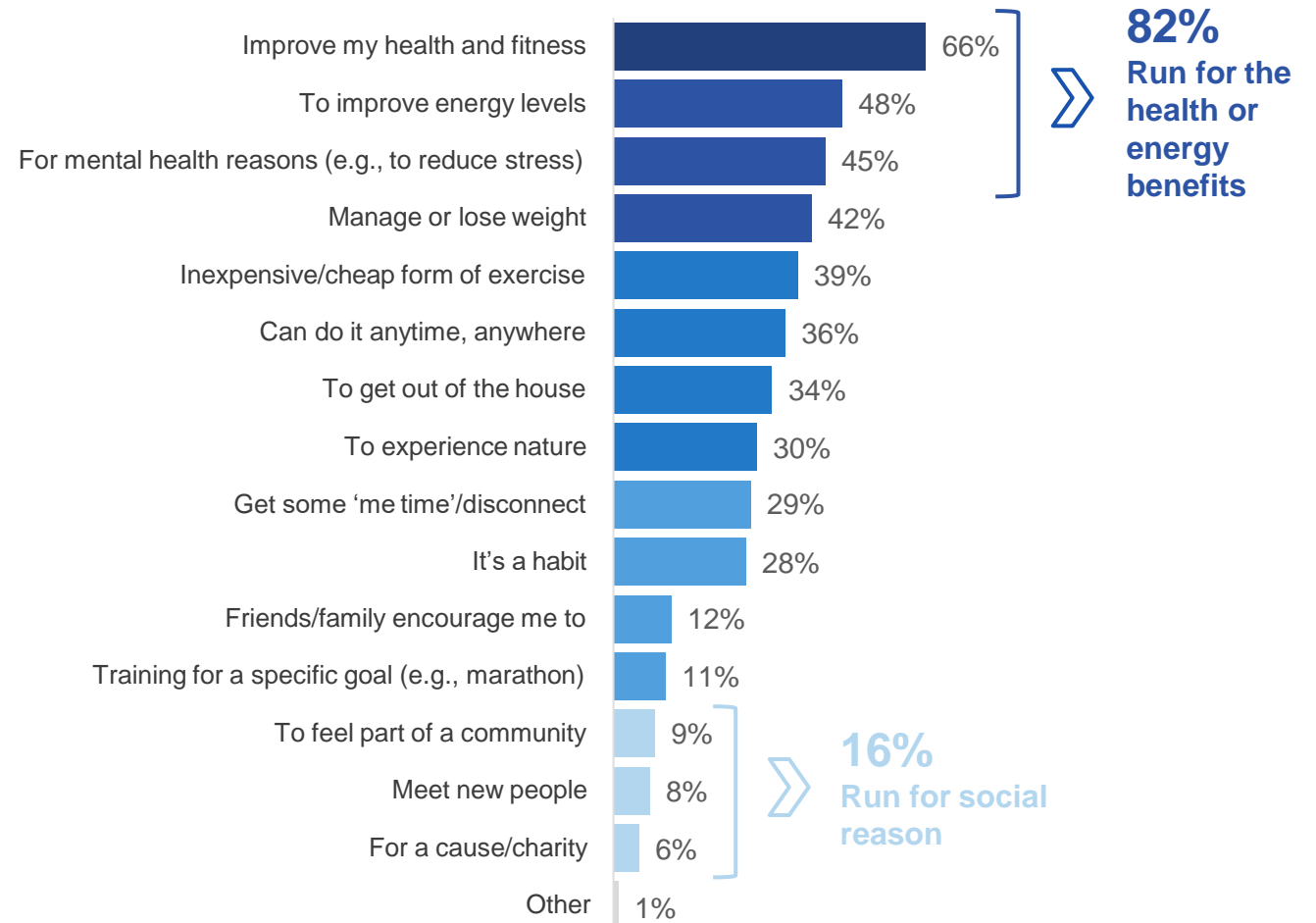
Those who had been running for more than five years were more likely to cite several reasons: improved health and fitness (79%), mental health (54%), lack of expensive (47%), can do it anytime/anywhere (43%), get some 'me time'/disconnect or it being habit (both 16%).

Women who ran weekly were more likely to cite mental health (56%), lack of expense (46%), can do anywhere/anytime (44%) and for a cause/charity (9%) as their reasons for running. This aligns with the barriers around time, money and family commitments for why women find it challenging to look after their health and wellbeing.

People with a disability or chronic/long-term health condition who ran weekly were more likely to cite the lack of cost (50%), training for a specific goal (16%) or for a cause/charity (10%).

Parents or guardians of any children aged under 18 years were more likely to cite habit (34%), encouragement from friends/family (16%), to feel part of the community (14%) or for a cause/charity (10%).

Reasons for running – Those who run weekly or more often



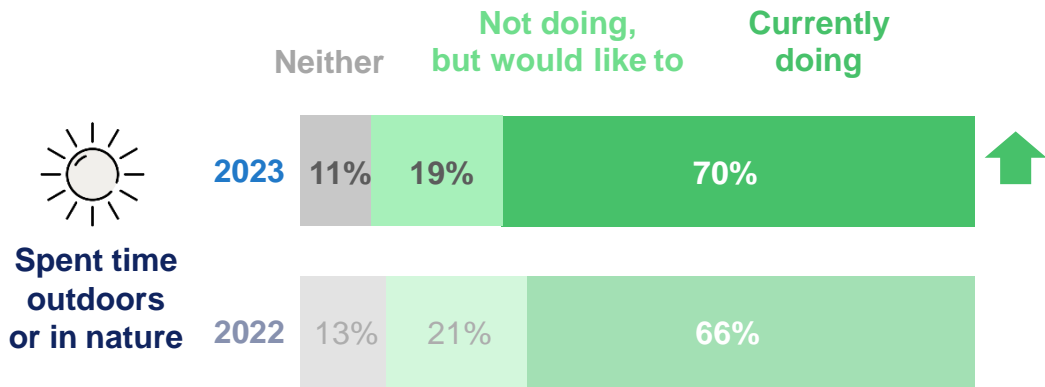
Nature & climate

- Spending time outdoors among nature was on the rise
- Those who spent time outdoors/in nature were more likely to have excellent/good overall quality of life
- Just under half (45%) of all Australians were stressed about our impact on the environment and this was heightened among the younger demographic



Spending time in nature or outdoors is on the rise compared to 2022 (70% vs. 66%)

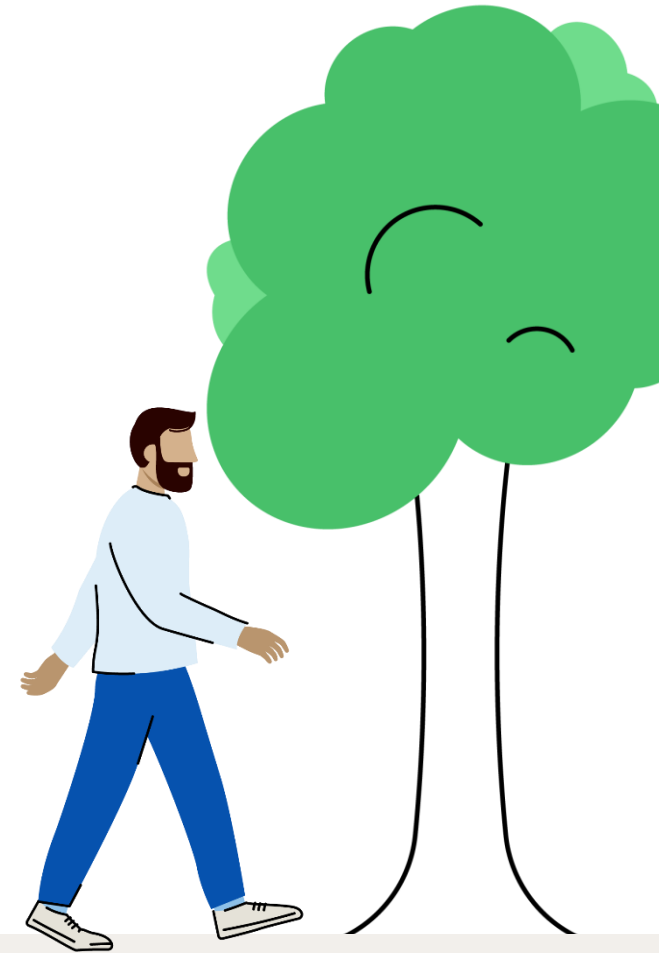
Behaviours and intentions – Spent time outdoors/in nature



Australians were significantly more likely to claim they spend time outdoors/in nature in 2023 (70% from 66% in 2022).

Those that spend time outdoors were more likely to have excellent/good overall quality of life (e.g. 62% of those that spend time in nature have good/excellent quality of life, vs. 42% for those that aren't currently spending time in nature).

Those who spend time outdoors were significantly more likely to be have PHI (72%), have a partner/souse but no children (74%) or have a family with youngest between 13-18 years (76%), own their home (outright or with a mortgage, 74%), have a household income of \$150k or more (76%).

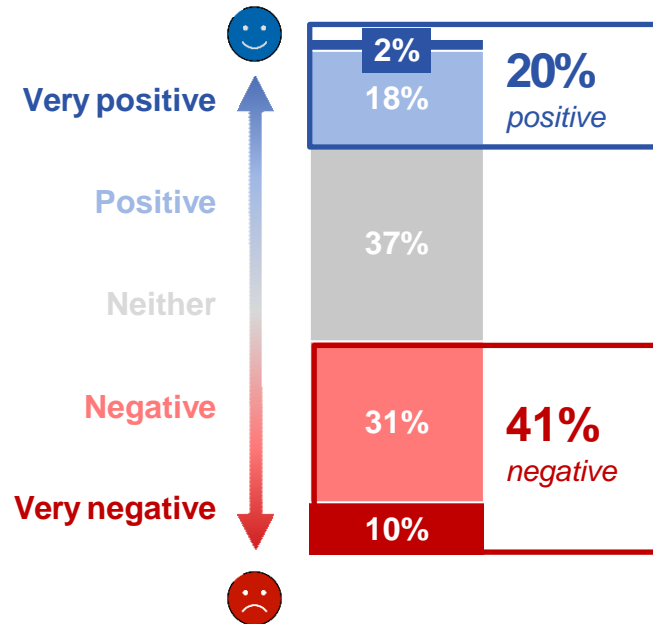


Base: All respondents 2023 n=2,005, 2022 n=2,006.
Q.7. Which of the following (if any) do you currently do, or have you done in the past 12 months?

↑ Significant drop/climb from 2022
↓

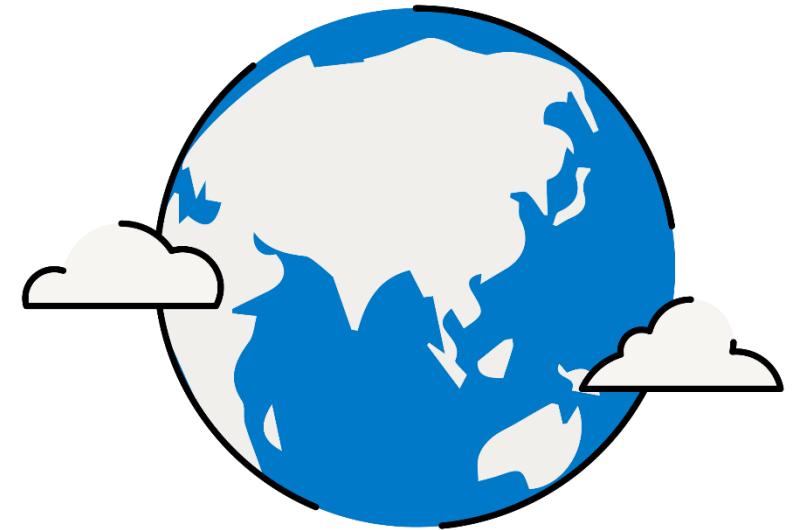
Just one in five Australians (20%) felt positively about the current state of the environment

Current state of the environment

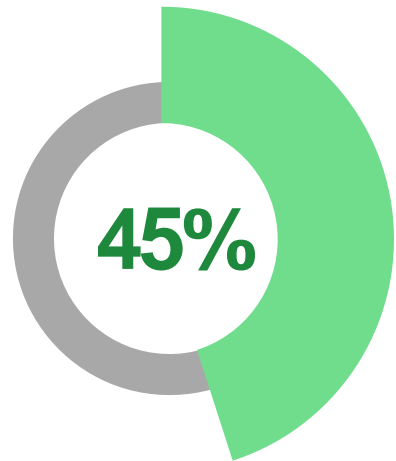


Two in five felt negatively, being more likely to be:

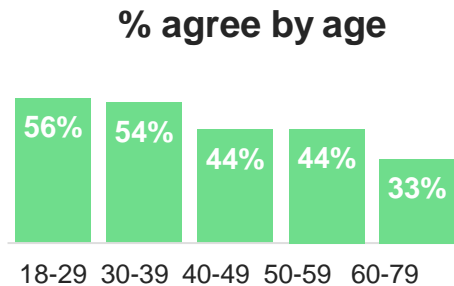
- **Women** (44% Total negative)
- Residing in **Tasmania** (57%)
- Have a **disability or chronic/long-term health condition** (45%)
- **Only speak English at home** (42%)



Under half (45%) of Australians were stressed about our environmental impact, heightened among those younger

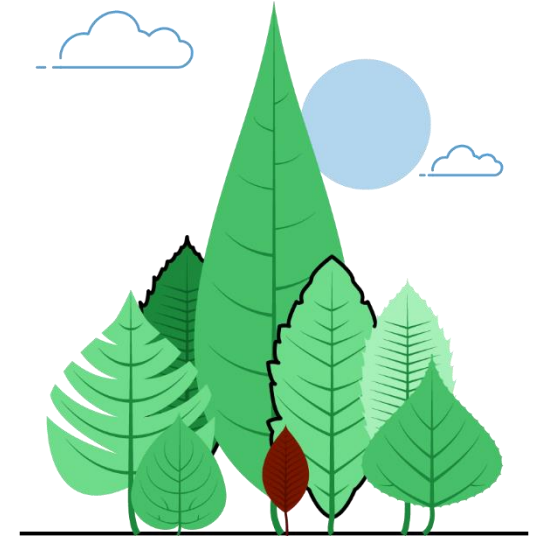


Agreed they are stressed about the negative impact we are having on the environment



Australians who were more inclined to agree:

- Resided in Tasmania (61% agree), or a metro area (48% vs. 40% regional)
- Were parents/guardians of child(ren) under 18 (49% vs. 43% who weren't)



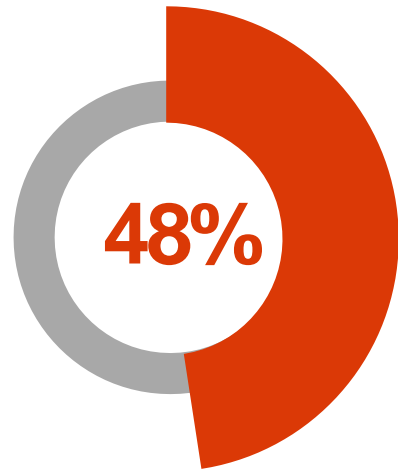
Over half of Australians aged under 40 agreed they were stressed about the negative impacts people are having on the environment. This is consistent with a growing recognition of the [connection](#) between climate change and mental health, where [eco-anxiety](#) (extreme worry about current and future harm to the environment caused by human activity and climate change) is heightened among those younger.

Accessing health care

- 48% agreed they felt accessing healthcare in Australia was complicated
- Two in three (66%) experienced at least one barrier to accessing a healthcare service over the past year. Wait times, limited appointments and costs were the main hurdles
- Despite this, more Australians were seeing allied health practitioners on a regular basis in 2023 (from 25% to 28% in 2022)
- Those living regionally wanted to shift away from virtual and telehealth in future
- In-person appointments had a higher preference among those older, online ones were more preferred among those younger
- Top drivers of in-person care were ability to be more thorough/physical, better quality and easier for patients to build relationships with their practitioners
- Top drivers of online care were no need to travel, convenience, quicker/less wait times and ease of access



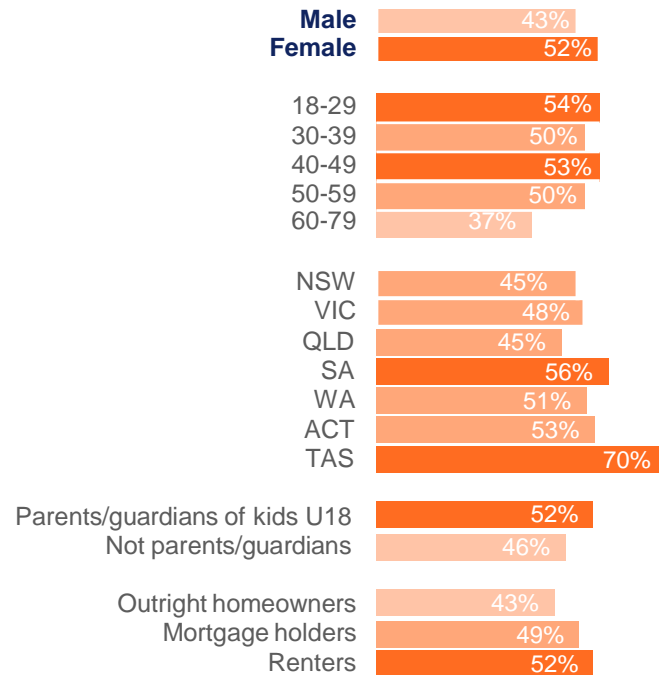
Half of all Australians (48%) agreed they felt accessing healthcare in Australia was complicated



agreed that

“Accessing healthcare in Australia is complicated.”

% agree by demographics



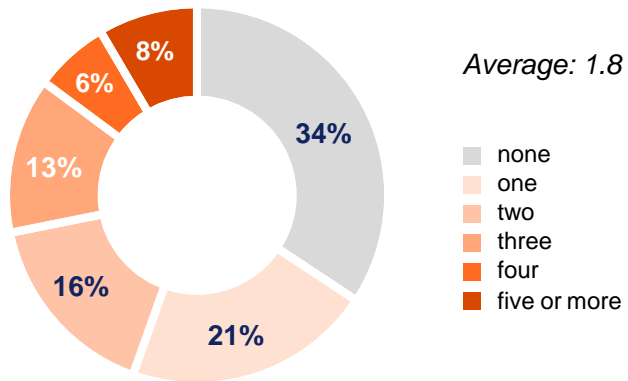
Women, parents/guardians of children under 18, those younger and residing in South Australia or Tasmania were most likely to agree that accessing healthcare in Australia is complicated.

Similarly, those under most financial stress such as renters as well as those who claim to have a hidden disability (e.g., chronic fatigue, ADHD) (54% agree) or a mental health condition (56%) were also more inclined to agree. This could indicate that those who may be experiencing more cognitive load and daily stress could be finding accessing healthcare more of a struggle which could be creating a potential barrier to use and add further stress to this cohort.



Two in three (66%) experienced a barrier to accessing a healthcare service over the past year, with long wait times, limited appointments and costs the main barriers

Number of barriers experienced when trying to access healthcare over the past year

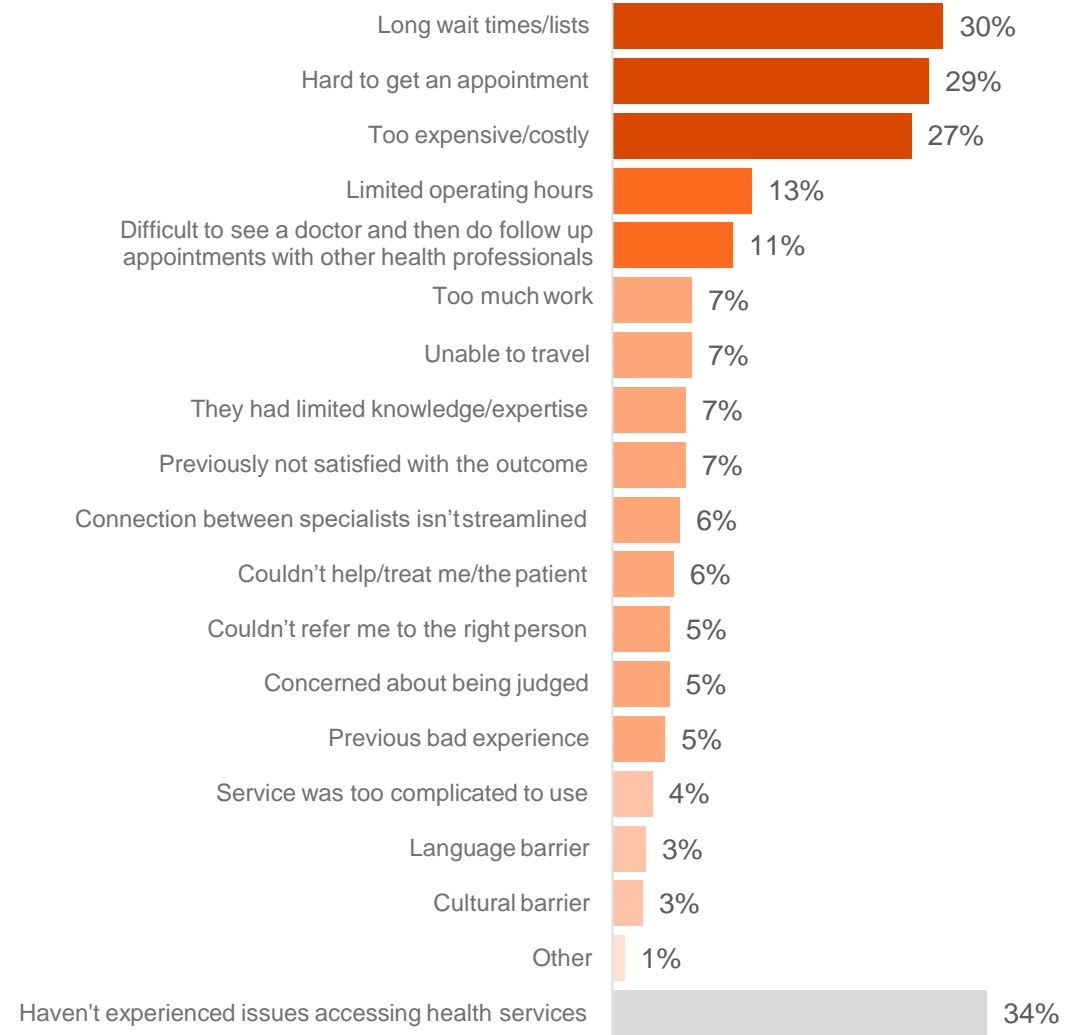


Those who experienced more barriers to access than on average were:

- Aged under 60 (2.0 vs. 1.1 aged 60+ (average))
- Identified as having a disability or chronic/long-term health condition (2.1 vs. 1.5 who did not)
- Spoke a language other than English at home (2.1 vs. 1.7 who didn't)
- Were parents/guardians of child(ren) under 18 (2.1 vs. 1.6)
- Women (1.9 vs. 1.6 men)

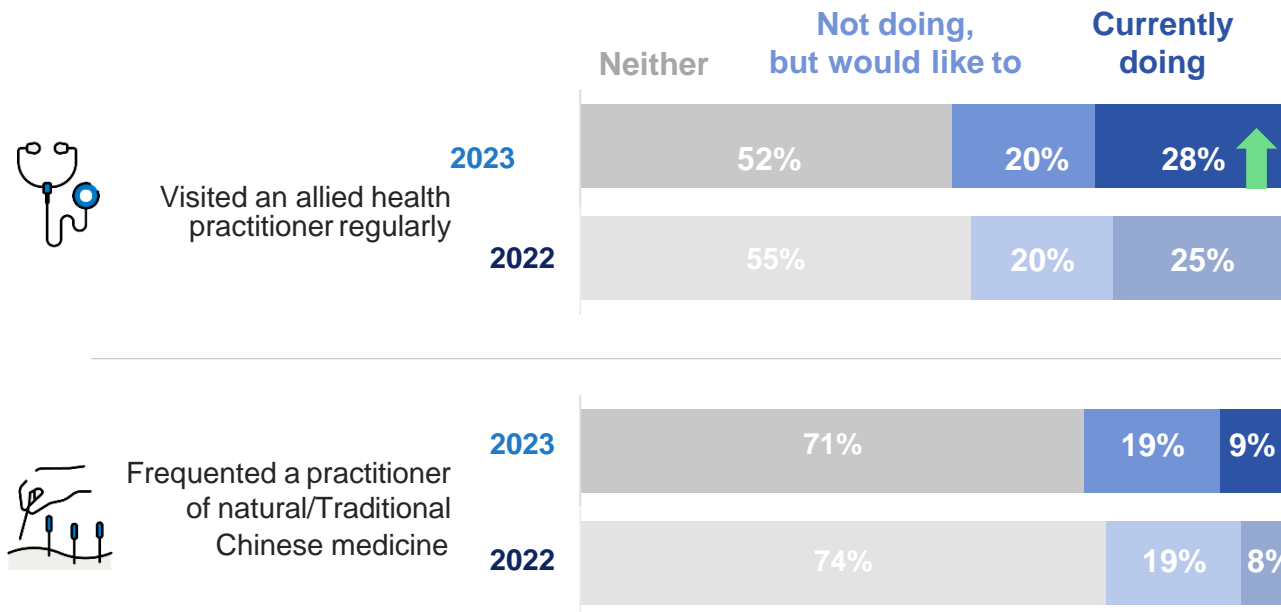
Barrier to accessing healthcare over the past 12 months

Base: All Australians 2023, n=2,005



Over a quarter of Australian adults indicated they regularly visit an allied health practitioner, up from 2022

Behaviours and intentions – Health care





Compared to 2022, Australians were significantly more likely to have visited or were visiting an allied health practitioner regularly (25% vs. 28%).

Those more likely to regularly visit an allied health practitioner included those aged **50+** (34%), own **PHI** (32%), be **retired** (37%) or **renters** (36%).

Those that frequent a practitioner of natural/traditional Chinese medicine were more likely to be **18-29** years old (13%), from **Western Australia** (11%), have **PHI** (12%), have a **Bachelor degree or higher** (13%), **work full/part time** (11%), have a **hearing impairment** (18%), or speak a **language other than English** at home (19%).

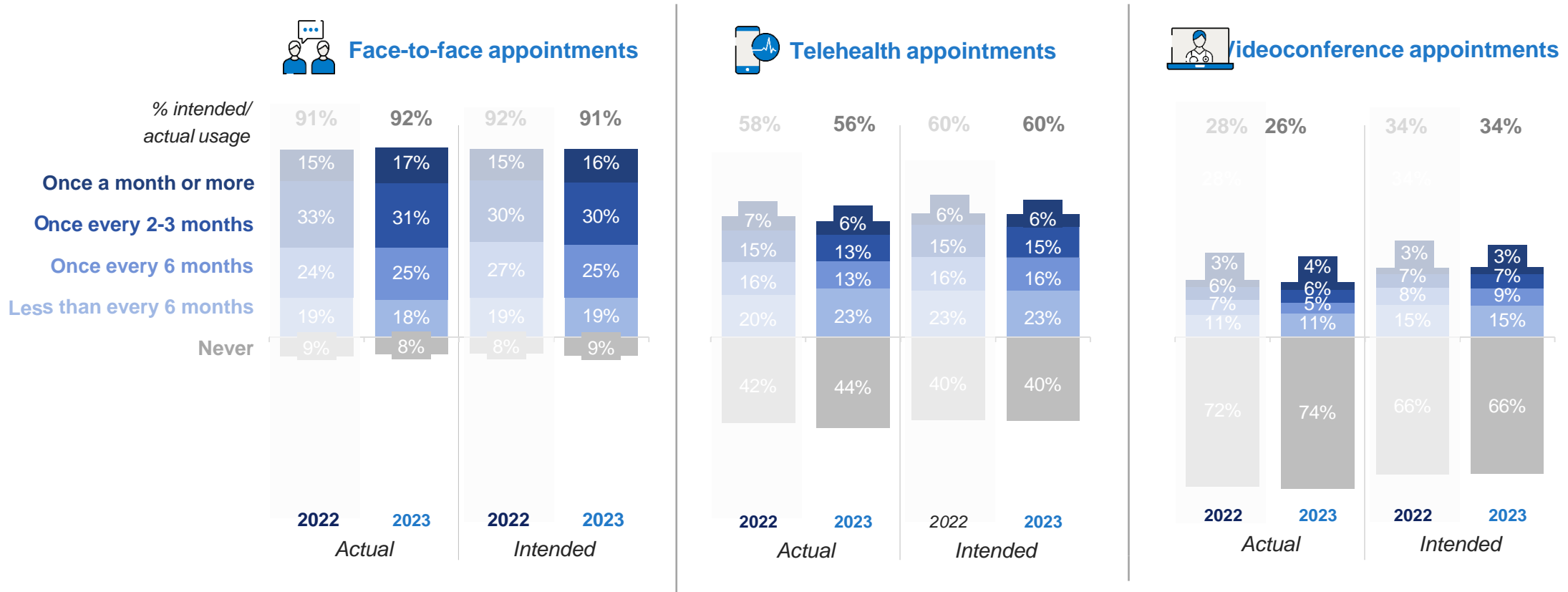
Base: All respondents 2023 n=2,005, 2022 n=2,006.

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

 Significant drop/climb from 2022


While Australians prefer in-person appointments, desire and use of telehealth and videoconference remains consistent with 2022

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



Base: All respondents 2023 n=2,005, 2022 n=2,006.

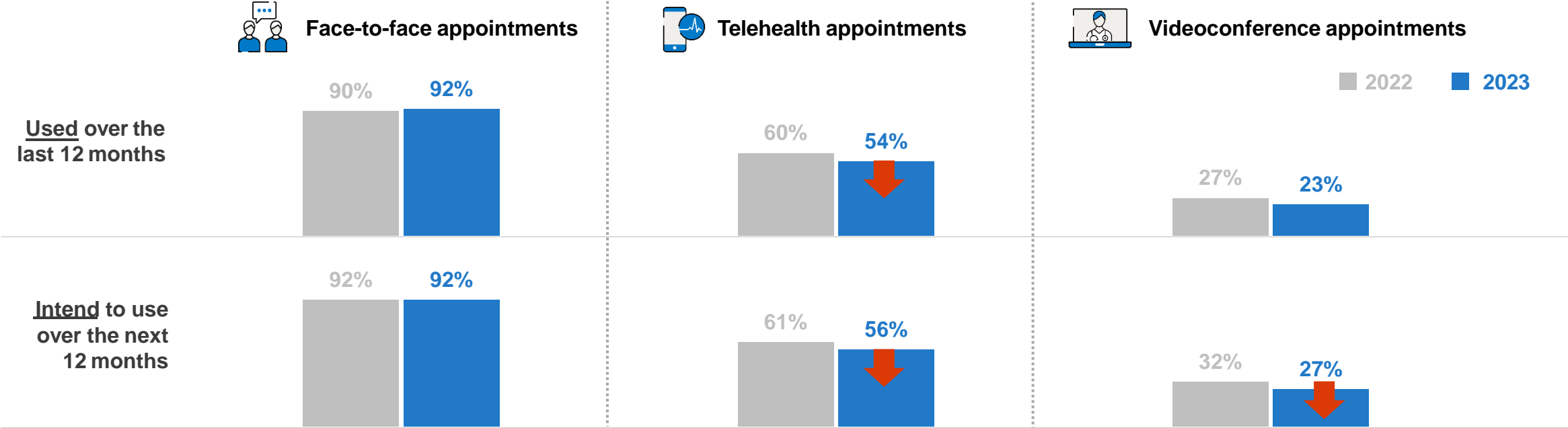
Q.22. Over the past 12 months, how often have you used the following services? /

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

Despite steady online use from 2022, those residing regionally wanted to shift away from online services in future

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

There was no significant change among metro residents from 2022.

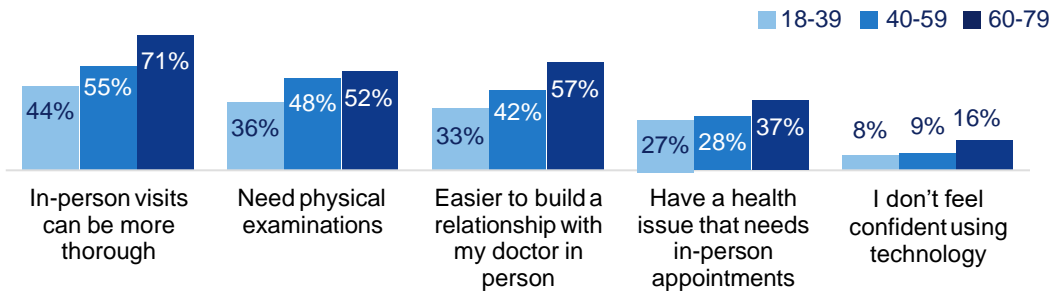


Base: All region respondents 2023 n=664, 2022 n=669.
 Q.22. Over the past 12 months, how often have you used the following services? /
 Q.23. How often do you expect to use the following services over the next 12 months?

↓ Significant climb from 2022

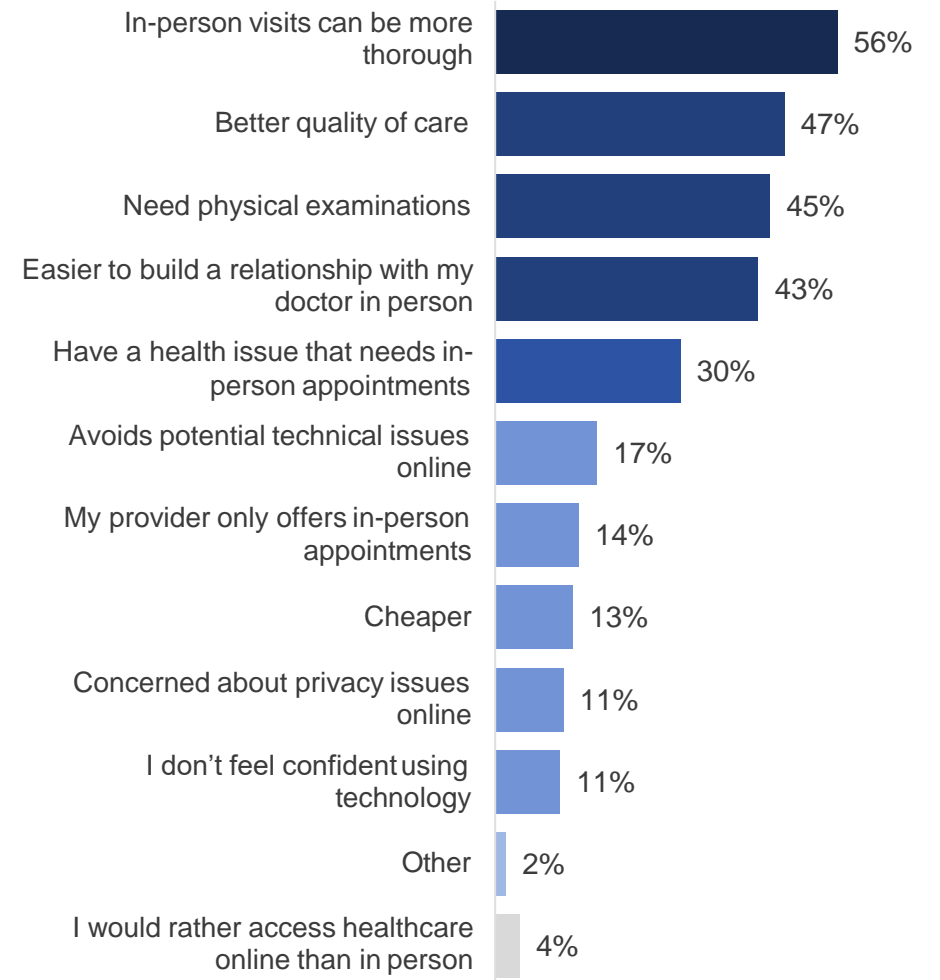
Top drivers of in-person care were ability to be more thorough/physical, better quality and easier for patients to build relationships with practitioners

Younger Australians were more inclined to say they would rather access healthcare online than in person (7% aged under 40 vs. 2% aged 40+), where preference for various aspects of in person care climbed with age:



Cost as a driver to access in-person healthcare was however significantly higher among those younger (16% aged under 40, 13% aged 40-59, 8% aged 60-79).

Drivers of in person care

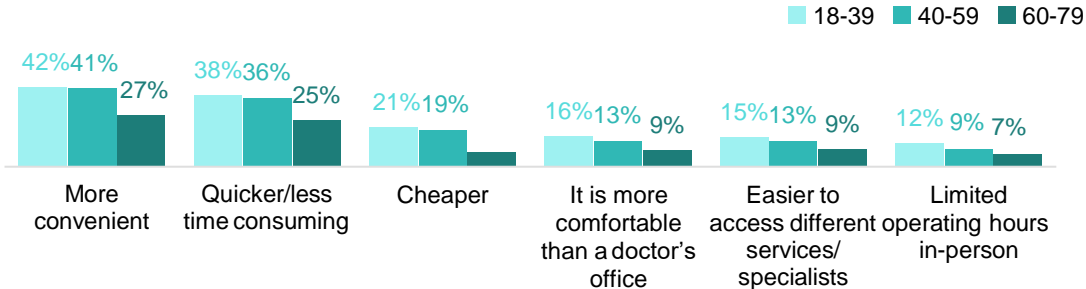


Base: All respondents 2023, n=2,005.

Q.23.a. What are the reasons (if any) you would access healthcare in-person (e.g., face-to-face appointments) rather than online (e.g., Telehealth, Videoconferences)?

Top drivers of online care were no need to travel, convenience, quicker/less wait times and ease of access

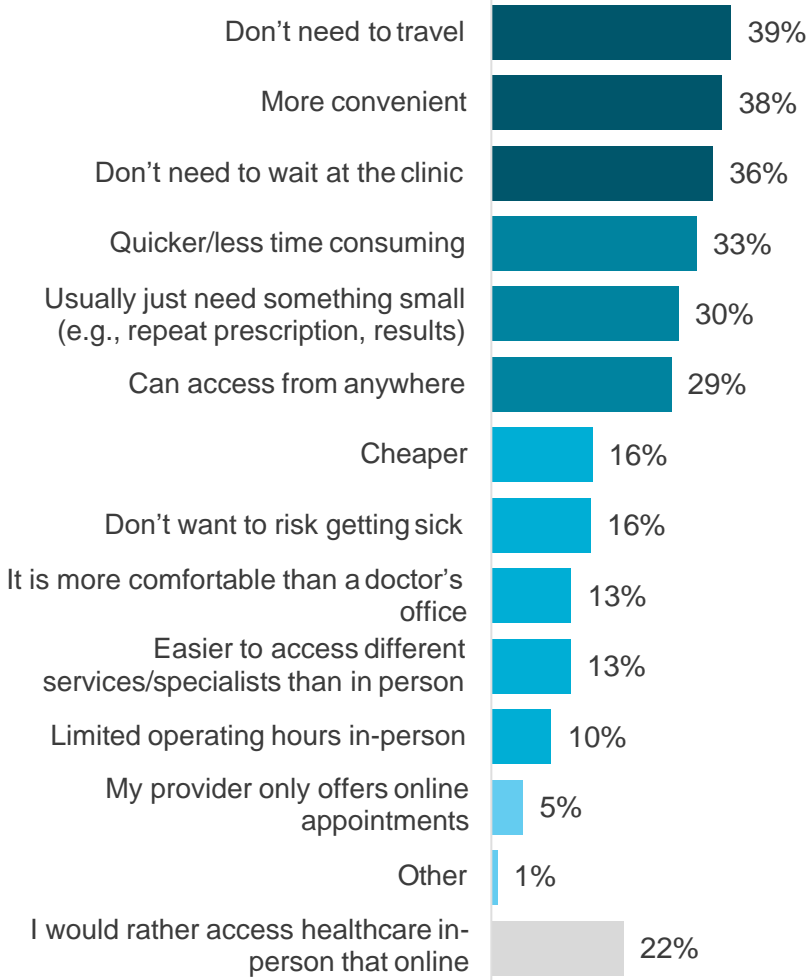
Older Australians were more inclined to say they would rather access healthcare in-person than online (37% aged 40+, 15% aged under 40), where preference for various aspects of online care dropped off with age:



Using online care for something small (e.g., prescription, results) did however significantly increase among those older (26% aged under 40, 31% aged 40-59, 36% aged 60-79).

Despite being more convenient, those residing in regional areas were more inclined to want to access healthcare in person than online (26% vs. 19% metro).

Drivers of online healthcare access



Base: All respondents 2023, n=2,005.
 Q.23.b. What are the reasons (if any) you would access healthcare online (e.g., Telehealth, Videoconferences) rather than in-person (e.g., face-to-face appointments)?

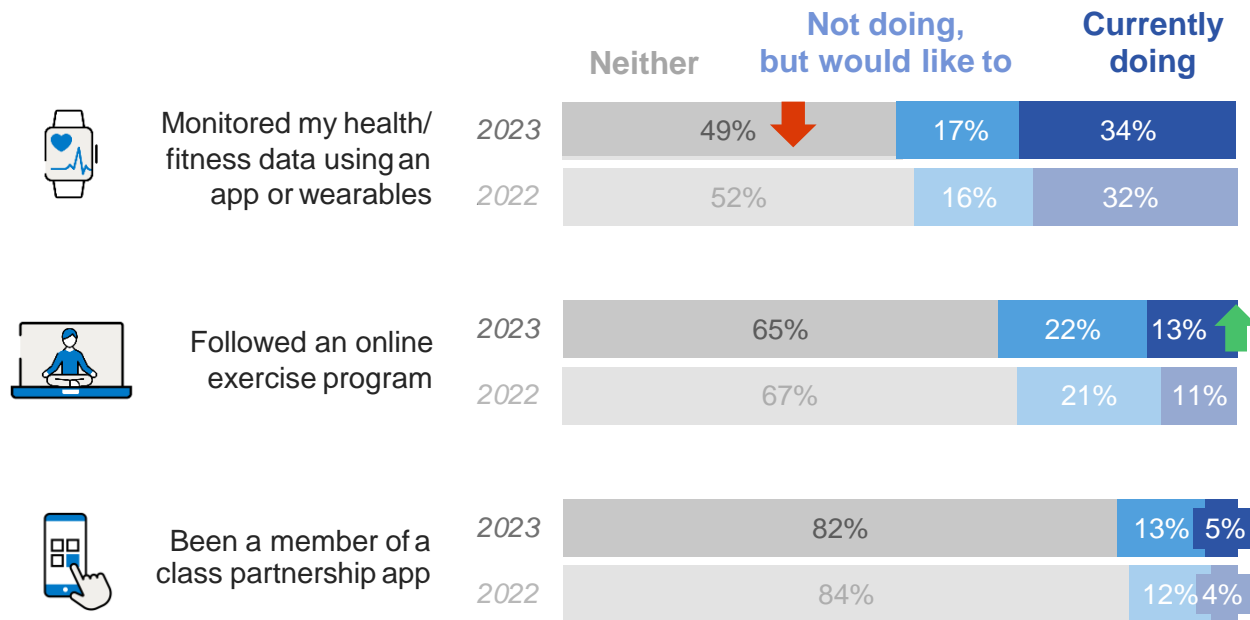
Healthcare and technology

- Use of technology in health and fitness is on the rise
- But, one in three (34%) feel technology is negatively impacting their mental wellbeing, and climbs to over half aged 18-29 (53%)
- Technology detox sought as recognition that use of tech impacts mental wellbeing
- Use of AI by specialists to diagnose health issues was not attractive to most at the moment with only one quarter interested
- Despite high profile data breaches, Australians are pragmatic with just over half (55%) welcoming doctors sharing their health data with allied health professionals



Technology is increasingly factoring into how Australians manage their health and fitness

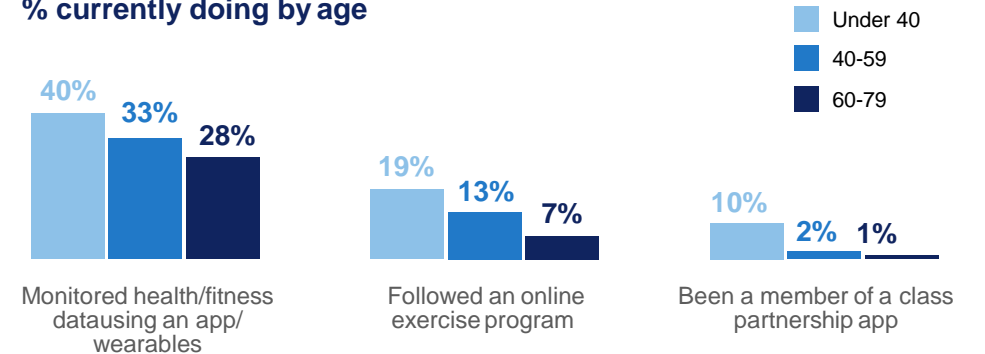
Behaviours and intentions – Health care



Australians were significantly more likely to use an online exercise program in 2023 (13% from 11% in 2022). There was also a growing desire among Australians to monitor their health and fitness using an app/wearable with more Australians claiming to be doing so, or to have a desire to do so in future (from 52% in 2022 to 49%).



This trend is largely driven by younger Australians who were more likely to be currently undertaking any of the following.

% currently doing by age

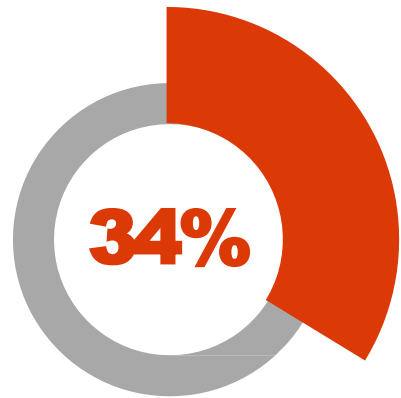


Base: All respondents 2023 n=2,005, 2022 n=2,006.

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

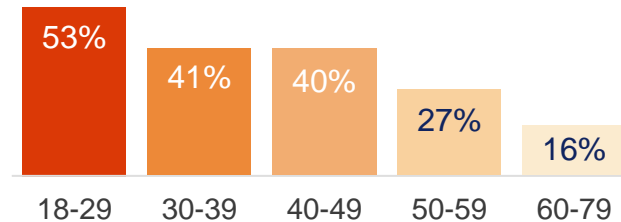
 Significant drop/climb from 2022


One in three Australians (34%) agreed that technology was having a negative impact on their mental wellbeing



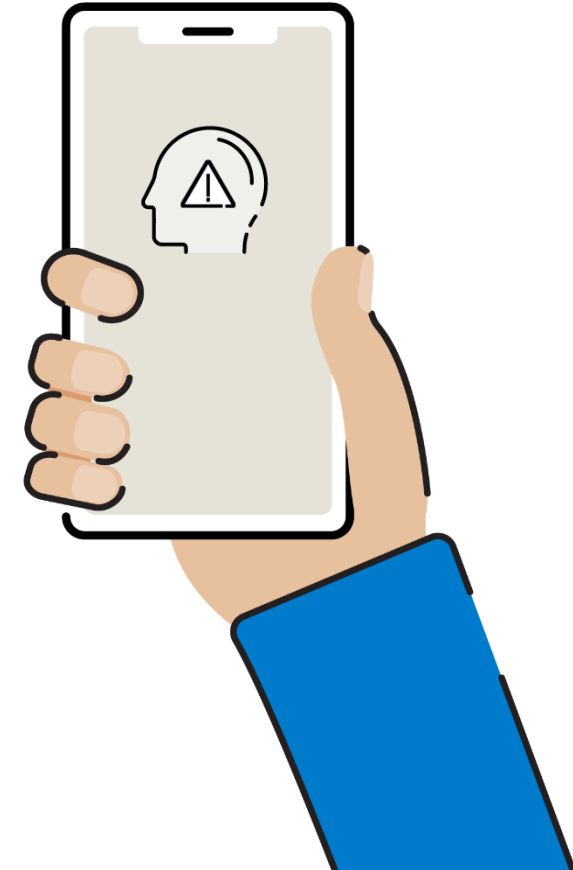
agreed that
“Technology is having a negative impact on my mental wellbeing.”

% agree by age



This sentiment was highest among those younger with over half of all Australian adults aged under 30 agreeing with this statement (53% agreed).

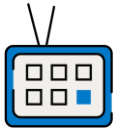
Parents/guardians of children under 18 were also more inclined to agree (42% vs. 30% who aren't), along with Australians who identify as having a mental health condition (39%), students (59%) and those residing in metro areas (36%).



As a result, some were cutting back on screen time and having a 'digital detox', highest among those aged under 30

Technology use and abstinence

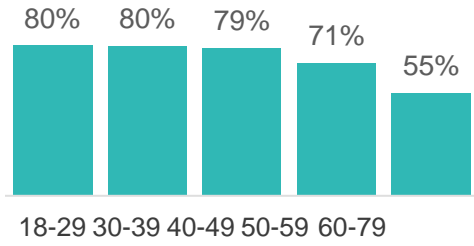
Over the last 12 months...



71%

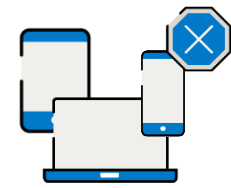
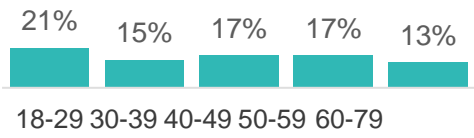
Used a streaming service
(e.g. Netflix, Stan, Disney, etc.)
On par with 73% in 2022

% by age



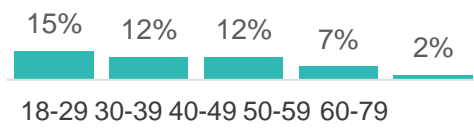
16%

of Australian adults **limited or reduced time spent on devices** to help them **manage their health and wellbeing**



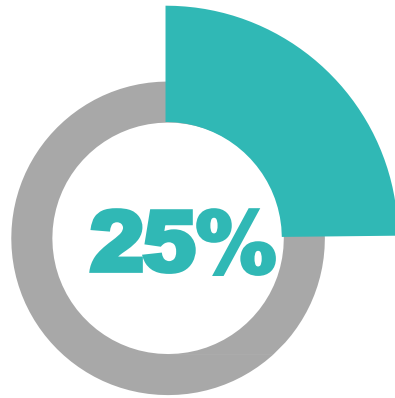
9%

of Australian adults partook in a **'digital detox'** or spent **less time online to improve their mental health**



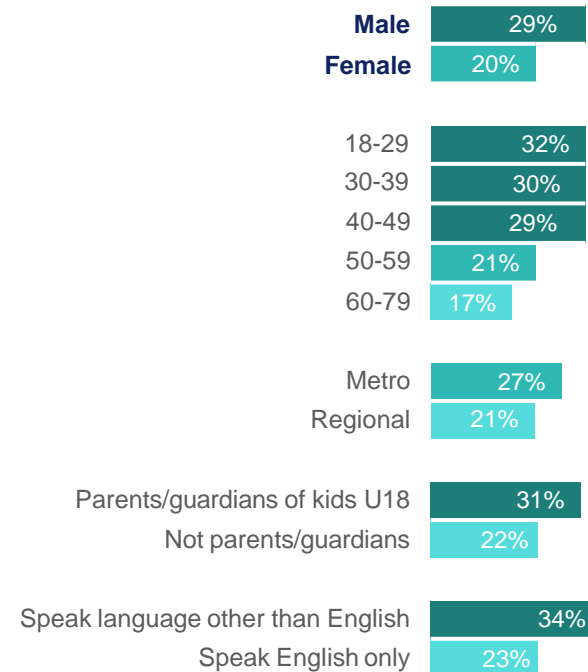
Base: All respondents 2023 n=2,005.
Q7. Which of the following (if any) do you currently do, or have you done in the past 12 months? Q8a. Which of the following (if any) have you undertaken to improve your mental health in the past 12 months? Q10. Over the past 12 months, what things have worked for you or helped you be successful in managing your health and wellbeing?

Three in four (75%) Australians disagreed that specialists should make use of AI to diagnose them



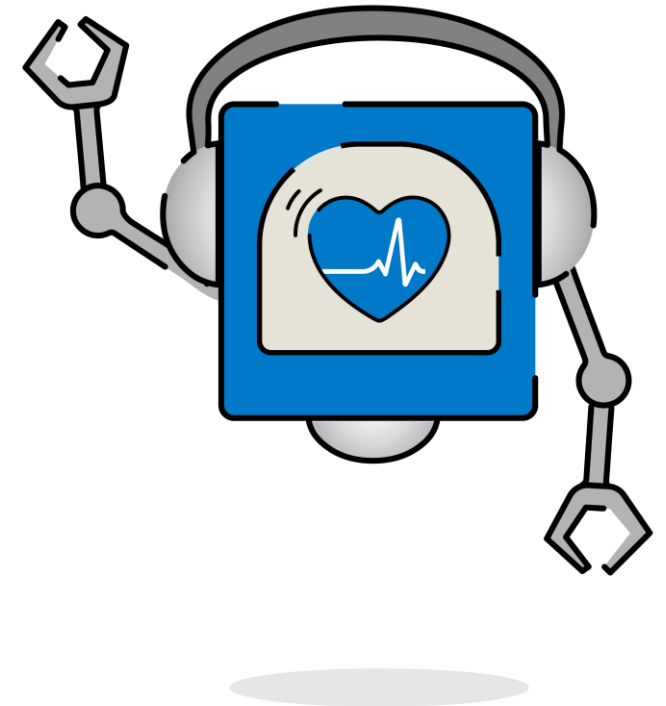
agreed that
“I think specialists should
make use of Artificial
Intelligence (AI) to
diagnose me.”

% agree by demographics

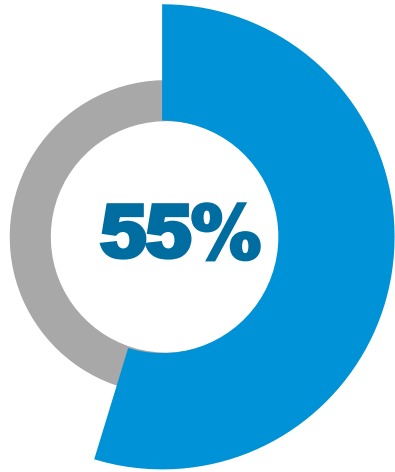


While the majority, three in four (75%), disagreed that they think specialists should make use of AI to diagnose them, one in four (25%) Australians were open to its use.

This sentiment was highest among men, those younger, aged under 50, those residing in metropolitan areas, parents/guardians of those aged under 18 or those who spoke a language other than English at home.



Over half of all Australians (55%) were open to doctors sharing their health data with allied health professionals



agreed that

“I would like doctors to be able to collect and share my health data electronically with other allied health like physiotherapists and dieticians.”

Australians who were more inclined to agree:

- Resided in **Tasmania** (70% agree), or a **regional** area (59% vs. 53% metro)
- Were **parents/guardians** of child(ren) under 18 (59% vs. 53% who weren't)
- Had a **chronic/long-term health condition** (64%), a **mental health condition** (60%) or a **hidden disability** (e.g., autism, neuro diversity) (61%)





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