



Consumers Health  
Forum **OF** Australia

Report

# Consumer Segmentation Survey

August 2020

Consumers Health Forum of Australia (2020)  
*Consumer Segmentation Survey*. Canberra,  
Australia

Leanne Wells CEO

**P:** 02 6273 5444

**E:** [info@chf.org.au](mailto:info@chf.org.au)

[twitter.com/CHFofAustralia](https://twitter.com/CHFofAustralia)

[facebook.com/CHFofAustralia](https://facebook.com/CHFofAustralia)

**Office Address**

7B/17 Napier Close  
Deakin ACT 2600

**Postal Address**

PO Box 73  
Deakin West ACT 2600

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# Acknowledgement

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CHF is the national peak body representing the interests of Australian healthcare consumers and those with an interest in health care consumers affairs. CHF works to achieve safe, quality, timely healthcare for all Australians, supported by accessible health information and systems.

NPS MedicineWise and Consumers Health Forum of Australia (CHF) gratefully acknowledge the funding and support of the Australia Government Department of Health through the Quality Use of Diagnostics, Therapeutics and Pathology Program. CHF were engaged and funded by NPS MedicineWise as the lead agency to plan and implement a project, Consumer Health Literacy Segmentation and Activation Research.

The Consumer Segmentation Survey, the final project activity was conducted by Urbis and Dynata. Urbis was contracted by CHF to develop the survey questionnaire, analyse the responses to the survey and produce a final report. Specific members of the team were: Caroline Tomiczek (Director) and Christina Griffiths (Senior Consultant), Abigail Chan (Consultant) and Peter Sakis (Research Assistant). Dynata was contracted by CHF to script and host the survey. Specific members of the team were: Mingky Sin (Senior Project Manager) and Chris Jones (Account Manager).

# Introduction

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Consumers Health Forum of Australia (CHF) is the national peak body representing the interests of Australian healthcare consumers and those with an interest in health care consumer affairs. CHF works to achieve safe, quality, timely healthcare for all Australians, supported by accessible health information and systems.

Launched in December 1999, the National Medicines Policy (NMP) aims to bring about better health outcomes for all Australians, focusing especially on people's access to, and wise use of, medicines<sup>1</sup>. In 2020, a review of the NMP is expected to occur. A central principle of the NMP is keeping consumers at the centre. To understand community needs, CHF was engaged and funded by NPS MedicineWise as lead agency to carry out a research project that will contribute to improving consumer health literacy as it relates to quality use of medicines (QUM).

The objectives of the research project include:

- Provide findings that reflect the knowledge, attitudes and perceptions of 'grass roots consumers' in relation to QUM.
- Identify the current understanding of consumer health literacy for Australians as it relates to QUM.
- Identify and characterise key consumer segments as they relate to QUM health literacy to assist in future resource or program development.
- Identify relevant QUM and health literacy indicators for future evaluation of collective impact
- Distribute findings to support the review of the NMP.

To achieve this, CHF are undertaking the following activities:

1. Formative Research
2. Literature review
3. Virtual Consumer Led Discussions
4. National Consumer Segmentation survey

A Rapid Literature Review on Health Literacy and Quality Use of Medicines was completed in May, Virtual Consumer Led Discussions in June, and the Consumer Segmentation Survey throughout July and August 2020. This report provides an overview of results of the online survey of n=1,503 people aged over 18 across Australia. The report is grouped into three sections:

- Methodology
- Overall survey findings
- Segmentation analysis.

The overall survey findings provide analysis of the survey across all respondents while the segmentation analysis provides details of the profile of each of the three segments.

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<sup>1</sup> Australian Government Department of Health and Ageing 2000, 'National Medicines Policy', available at:  
[https://www1.health.gov.au/internet/main/publishing.nsf/Content/B2FFBF72029EEAC8CA257BF0001BAF3F/\\$File/NMP2000.pdf](https://www1.health.gov.au/internet/main/publishing.nsf/Content/B2FFBF72029EEAC8CA257BF0001BAF3F/$File/NMP2000.pdf)

# Methodology

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## Online questionnaire

A questionnaire was developed to provide insight into the Australian population's attitudes, knowledge and perceptions on QUM.

The questionnaire covered the following key areas:

- Health status
- Usage of health services and medicines
- Level of engagement with medicine use
- Understanding of QUM
- Attitude towards health professionals' role in QUM
- Attitude towards complementary or alternative medicines
- Information sources on QUM
- Health literacy
- Demographics.

## Analysis of survey data

The survey was conducted by a third-party online consumer panel survey provider and was in field from Friday 17 July –Thursday 23 July 2020. The survey was completed by a total of n=1,503 respondents. Data was representative of the Australia population based on age, gender and location in accordance with ABS 2016 census data.

Frequency analysis was conducted on demographic questions to understand the overall profile of the sample and analysis to determine the mean ratings and the standard deviation of each attitudinal statement was also undertaken.

Responses to questions regarding health literacy were recoded and a mean rating across all questions allocated to each respondent with 0 being the lowest possible rating and 4 being the highest.

## Segmentation Analysis

The respondents were segmented based on responses to the attitudinal items included in the survey (0-10 agreement scale). Segmentation is a form of analysis that examines relationships between several variables and divides a population into segments based on shared characteristics—for example, geographic, demographic, attitudinal, or behavioural factors—that cause them to behave in similar ways or have the same needs. Urbis undertook a segmentation to gain a better understanding of the range of views regarding quality use of medicines across respondents.

*Base: 1,503*

*Various questions*

*\*These two questions have a reversed scale where the responses 'always or often' indicate low health literacy.*

For the segmentation, factor analysis was undertaken, reducing the attitudinal battery of items to four factors. A score for each factor (factor scores) was then identified for each respondent. The factor scores were then put into a clustering algorithm (Quick Cluster). Urbis did not specify the number of clusters; instead, a series of optimal solutions were identified by the statistical software. The resulting output was the segment bases, i.e. the segment membership for each respondent. The size of the various segments for each solution was then charted for easy interpretation and mapped against attitudinal statements and key demographics to identify the best solution (three segments), which is included in this report.

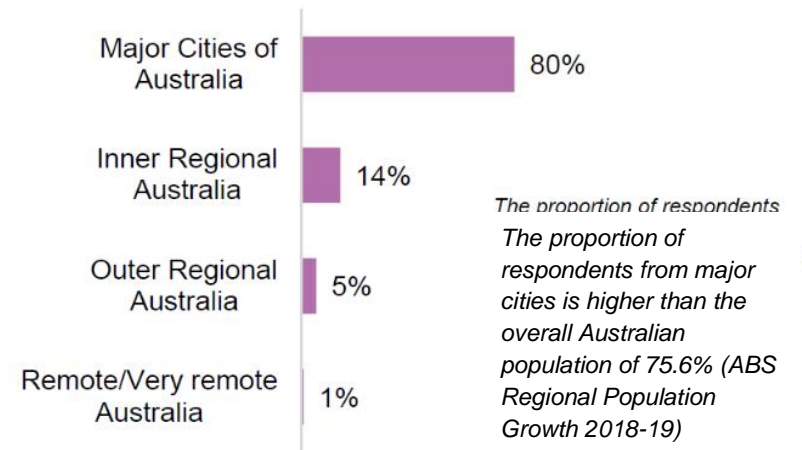
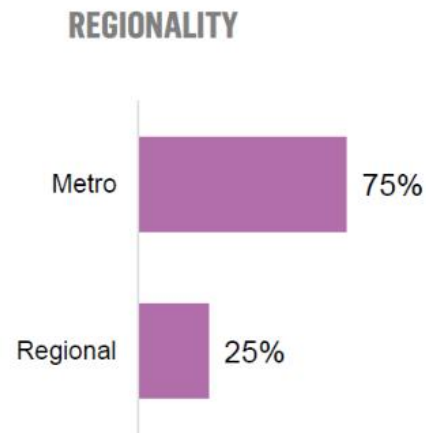
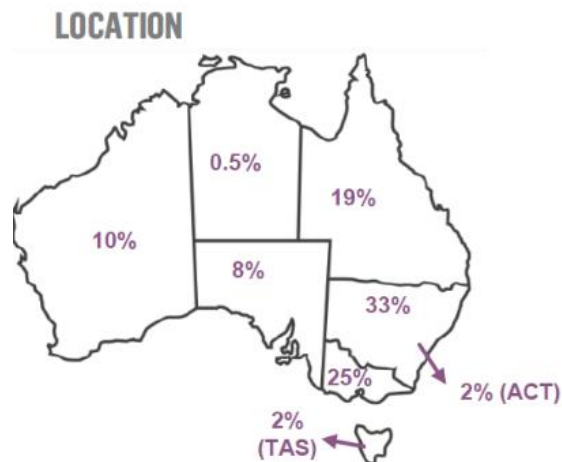
## Limitations

The survey results should be considered with the following limitations in mind:

- Opinions may be biased to those who participate in online panels and may not be representative of the whole population.
- Selection of respondents is limited to those who have access to the internet.
- Panel respondents may not have responded accurately or honestly which may bias results.
- A fully validated scale for health literacy was not adopted for this questionnaire, and therefore results should be interpreted with caution.
- The proportion of respondents identifying as speaking a language other than English at home is lower than the Australia population (16% of respondents compared to 21% of the Australian population). This is largely due to a lower representation of Culturally and Linguistically Diverse (CALD) people subscribing to online panels.
- The proportion of respondents identifying as having a bachelors degree or higher is much higher than the Australian population (45% of respondents compared to 22% of the Australian population). This may be due to the topic for the survey (QUM) attracting online panel members who have higher levels of education.

# Overall Survey Findings

## Demographic Profile of Respondents





## GENDER



FEMALE

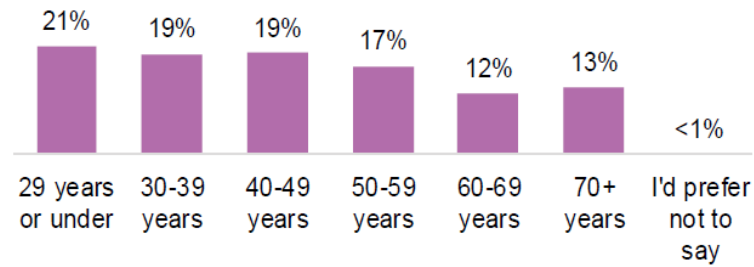
51%



MALE

49%

## AGE



## CULTURAL AND LINGUISTIC DIVERSITY

16%

speak another language other than English at home

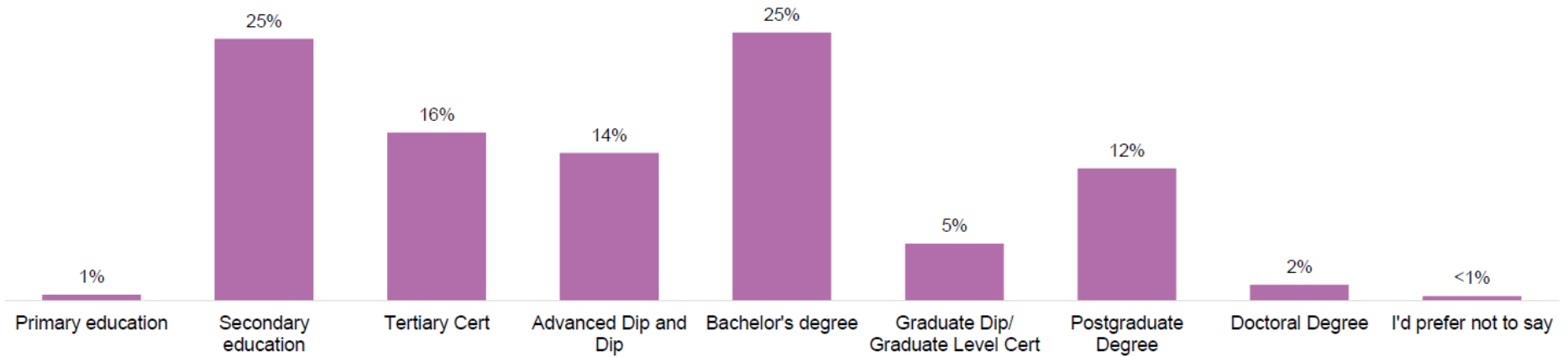
*The proportion of respondents who speak another language other than English is lower than the overall Australian population of 21% (ABS Census 2016)*

## ABORIGINAL STATUS

3%

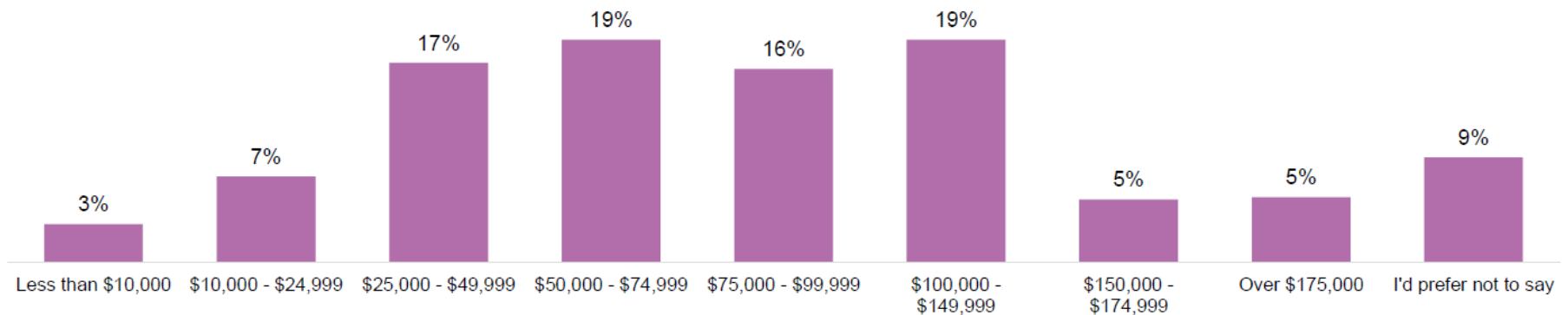
identified as Aboriginal and/or Torres Strait Islander

## Education



*The proportion of respondents with a bachelor degree qualification or above (45%), is higher than the overall Australian (15+) population of 22% (ABS)*

## Income



*Base n=1,503*

# Overall Health

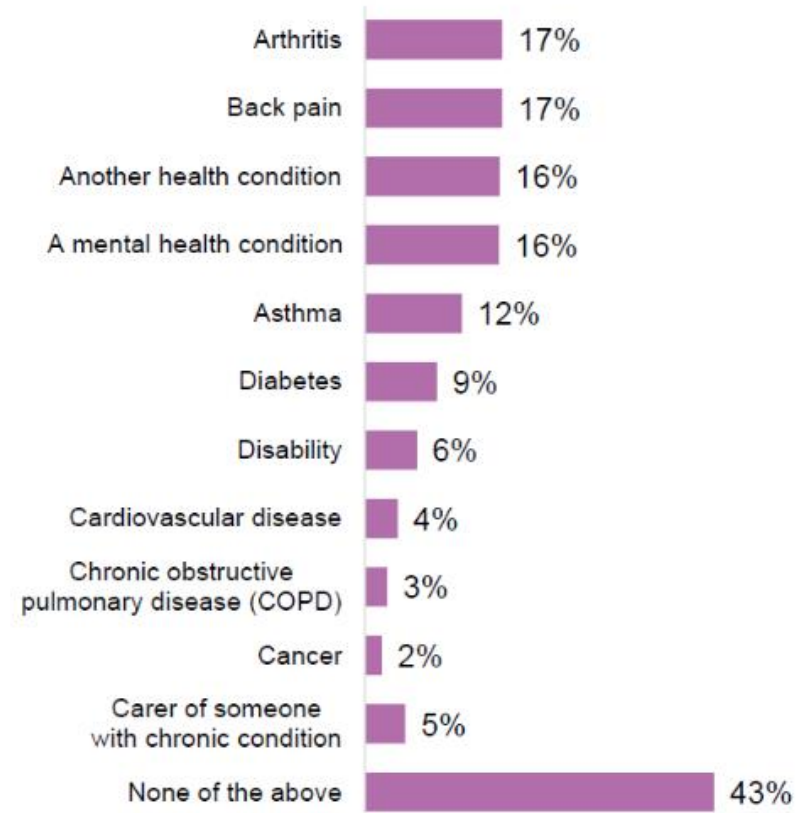
## Overall health rating



Base: 1,503

Question: In general, my overall health is...

## Health issues

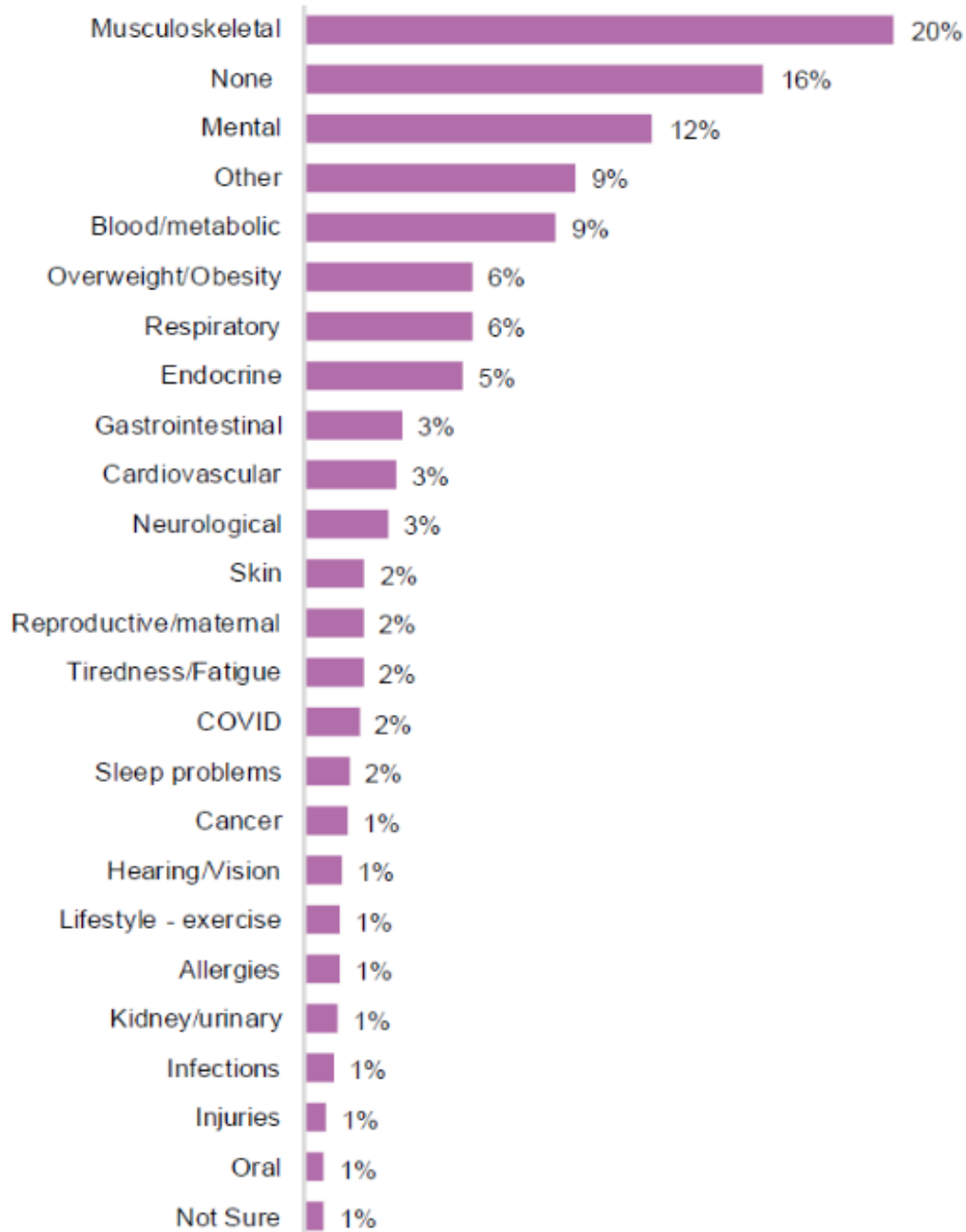


Base: 1,503

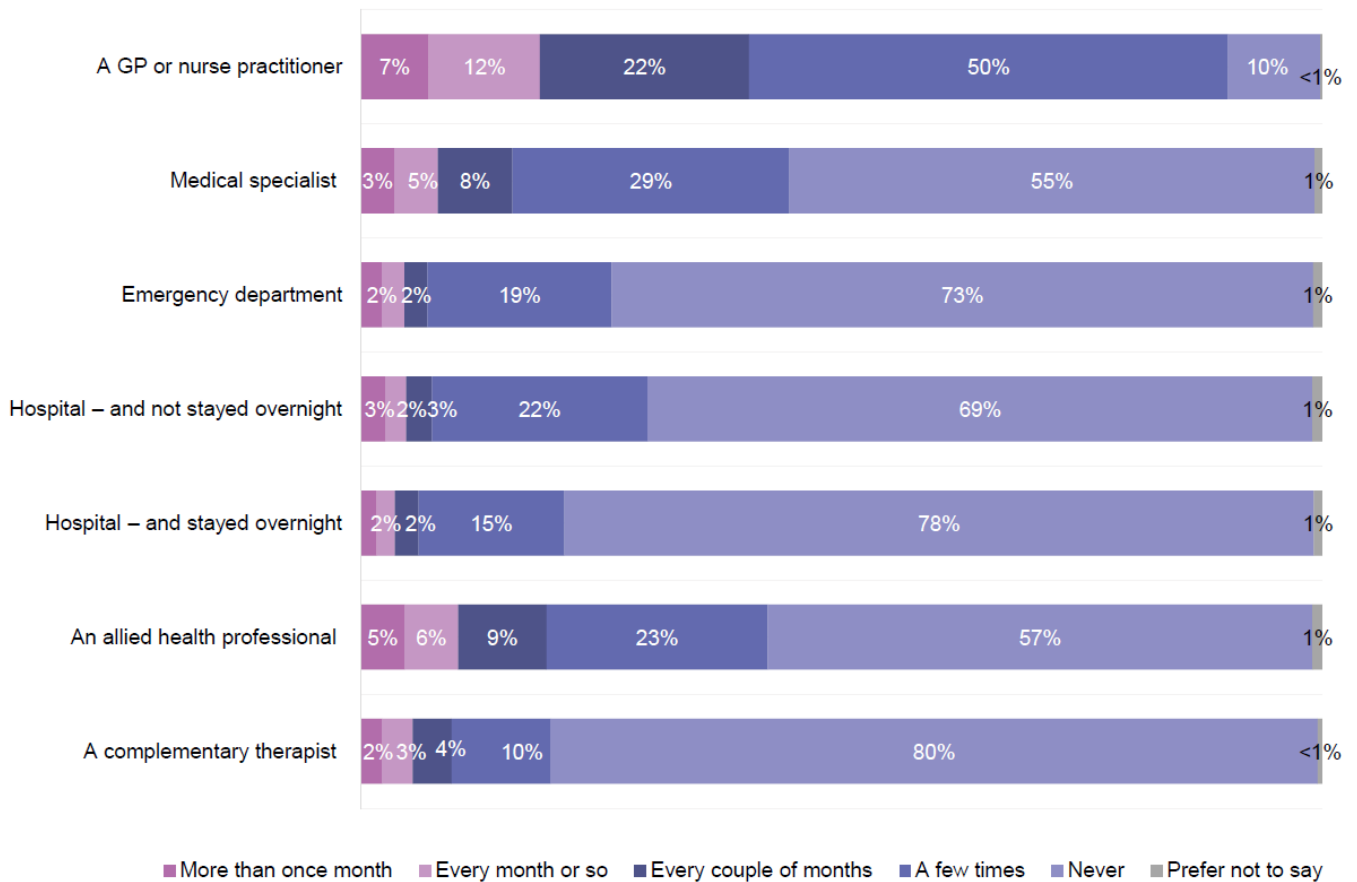
Question: Below are some more statements about your health.

Please select all that apply to you. Just give your best guess if you are unsure.

## Health issues



## Use of Health Services



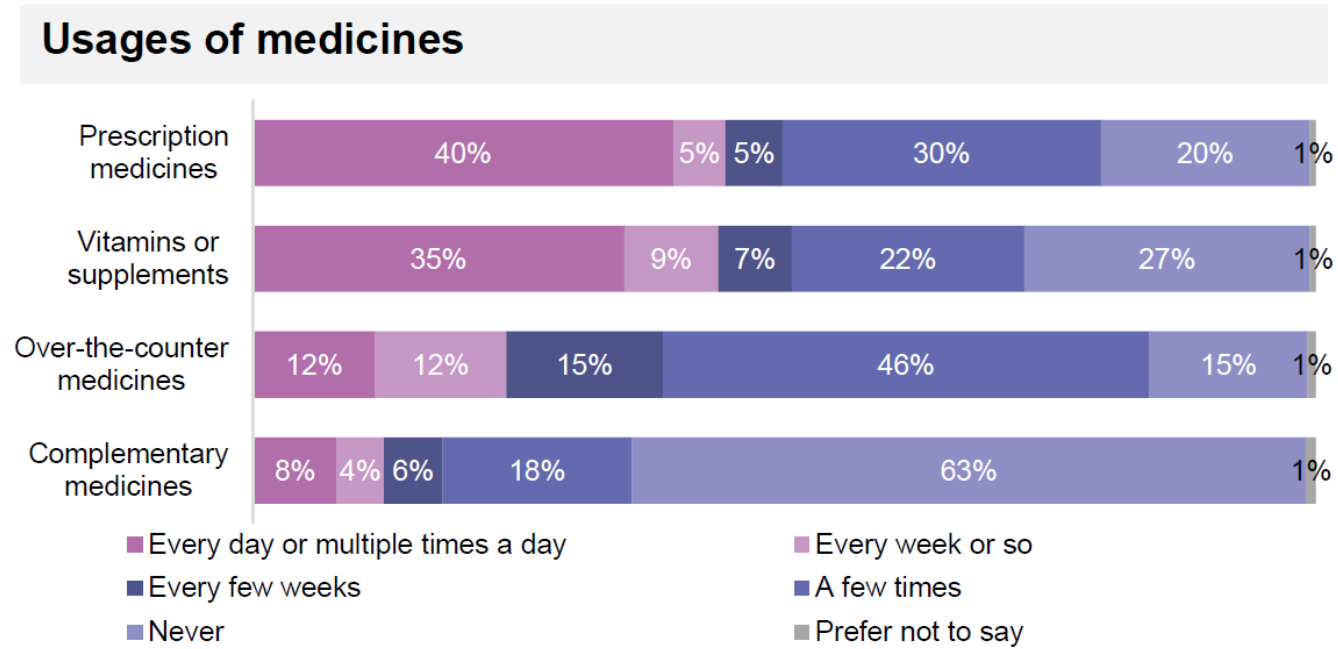
Base: 1,503

Question: In the past year, how often have you visited...?

Proportion of respondents who had visited at least once in the year:

- GP or nurse practitioner – 90%
- Medical specialist – 45%
- Emergency department – 26%
- Hospital (outpatient) – 30%
- Hospital (inpatient) – 21%
- Allied health professional – 42%
- Complementary therapist – 20%

## Use of Medicines



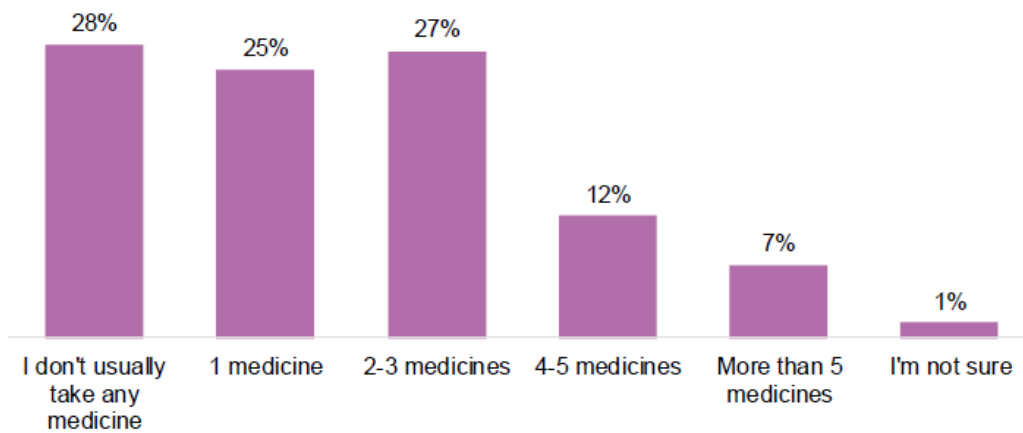
Proportion of respondents who had taken this medication least once in the last year:

- Prescription medicines – 80%
- Vitamins or supplements – 73%
- Over-the-counter medicines – 84%
- Complementary medicines – 36%

Base: 1,503

Question: In the past year, how often have you taken...?

## Number of medicines taken

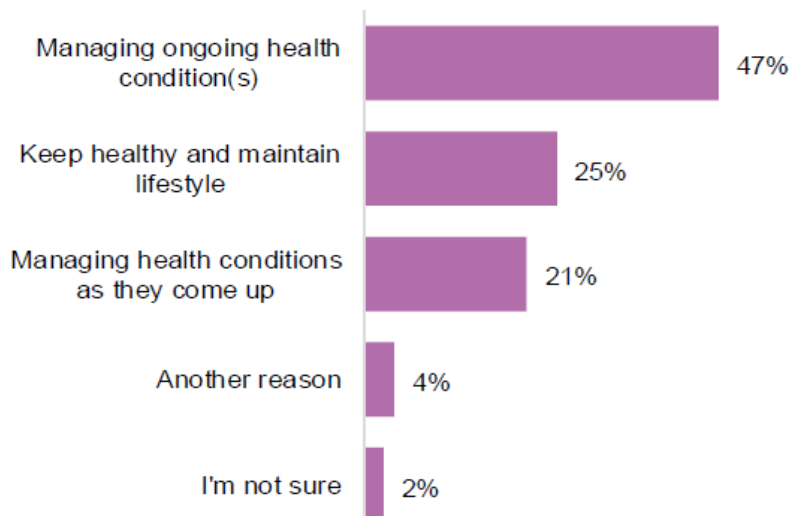


Base: 1,503

Question: On average, how many medicines would you take each day?

This includes over-the-counter and complementary medicines and vitamins or supplements.

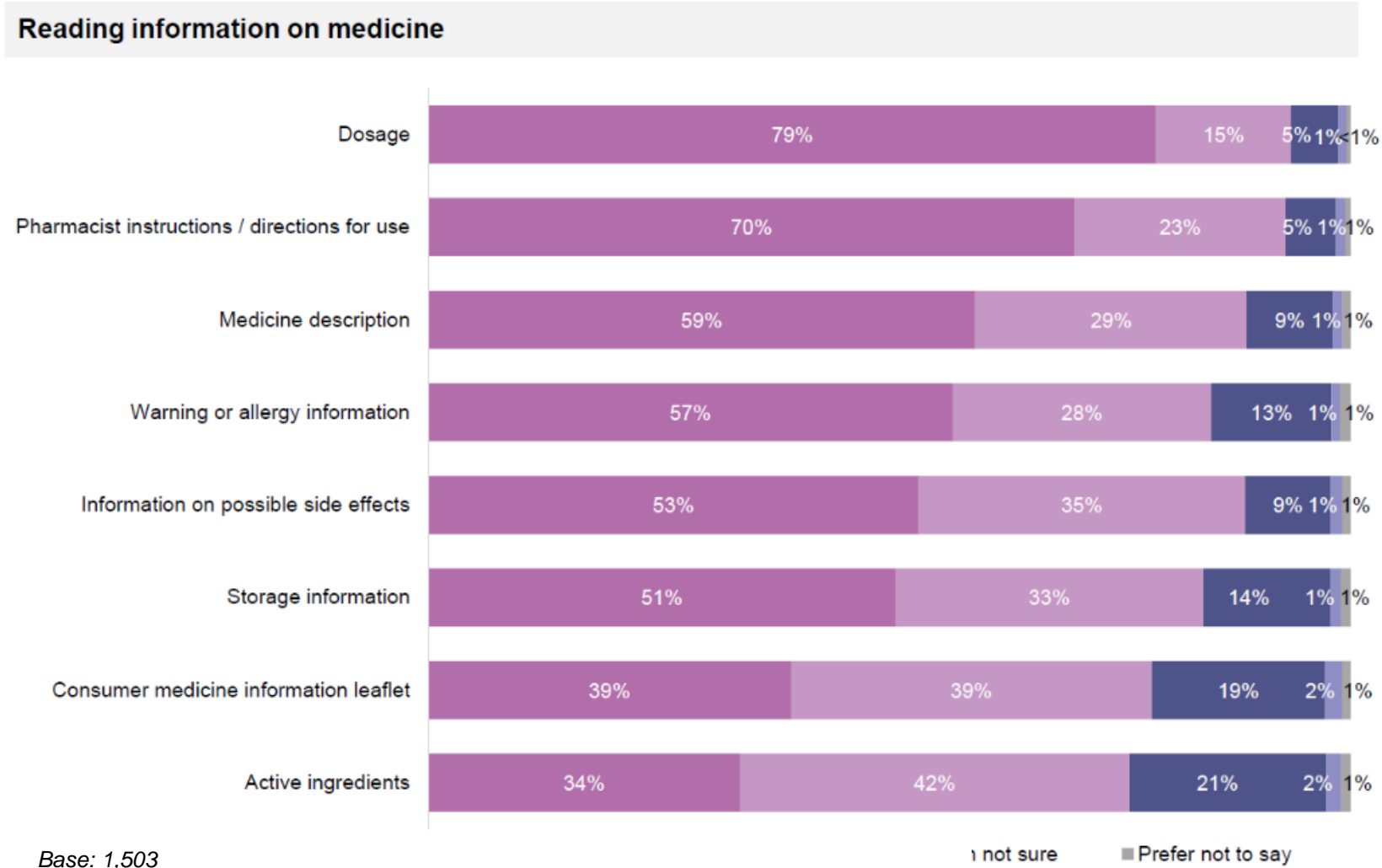
## Main reason for taking medicines



Base: 1,503

What is your main reason for taking medicines?

# Information about medicine



Base: 1,503

How often would you read the following information when you start taking a new medication?

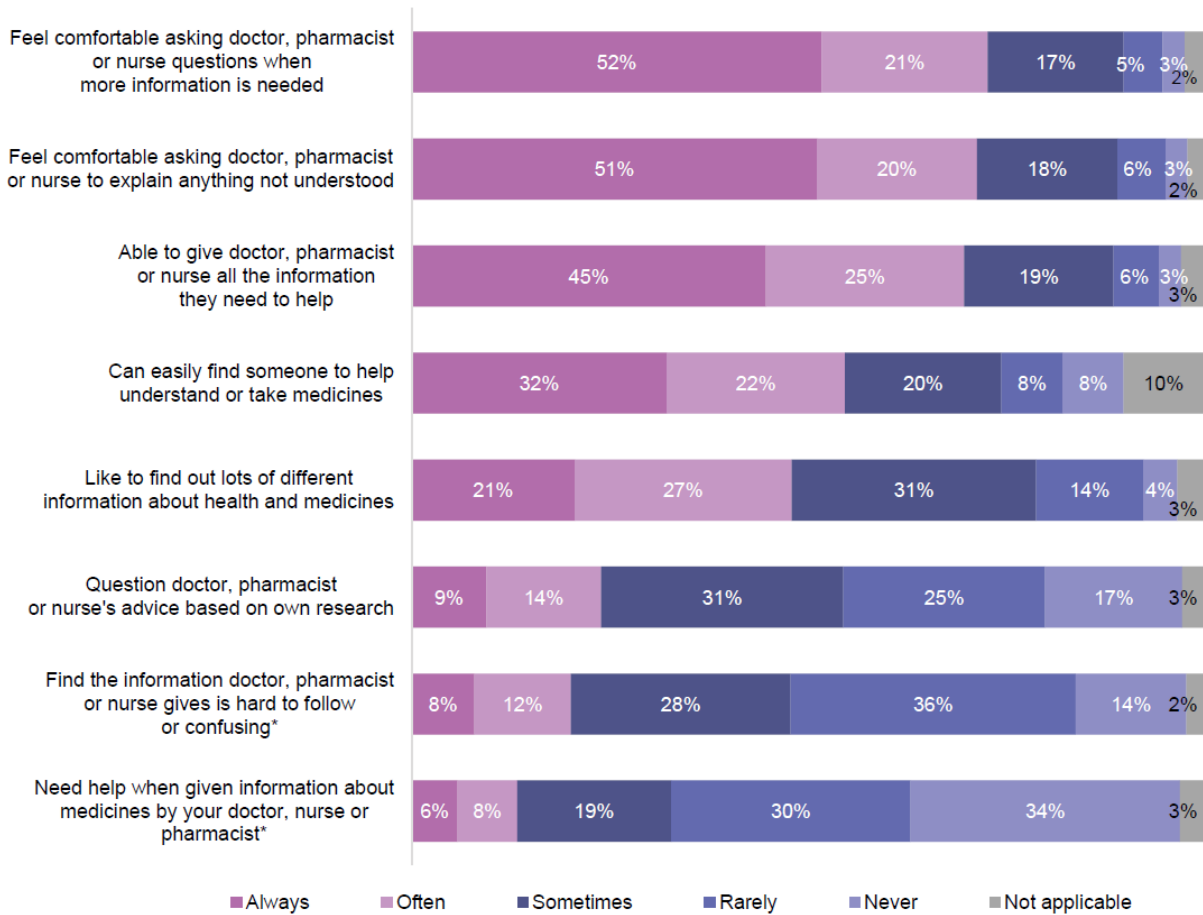


# Health Literacy

## Overall rating

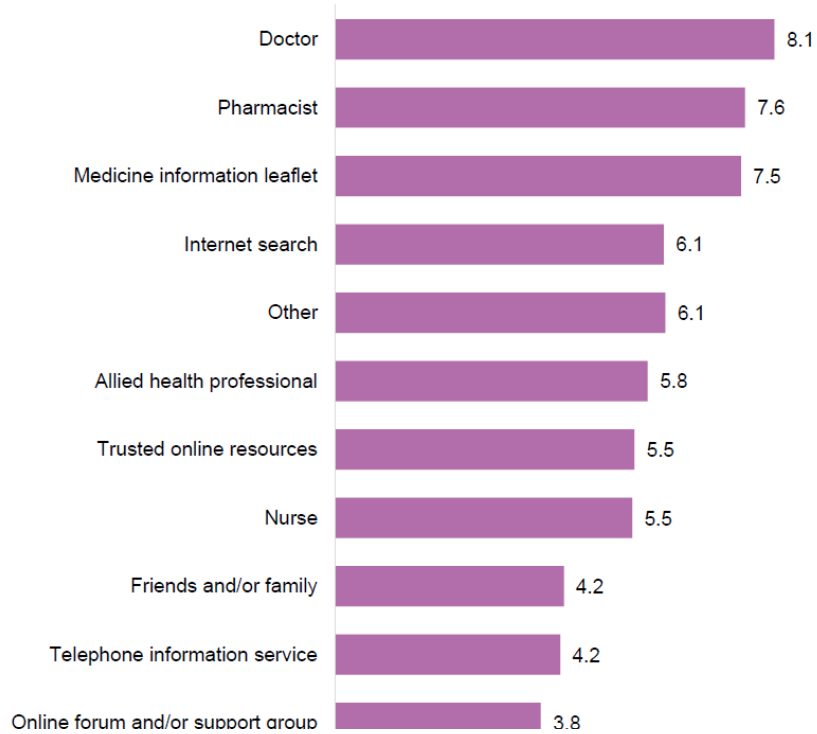
Respondents were asked a series of eight questions to assess their overall health literacy. A mean across all eight responses was calculated to get an indicative rating of health literacy for each respondent. The average rating across all respondents was **2.6/4**. Base: n= 1,487.

### Individual health literacy indicators



# Information source

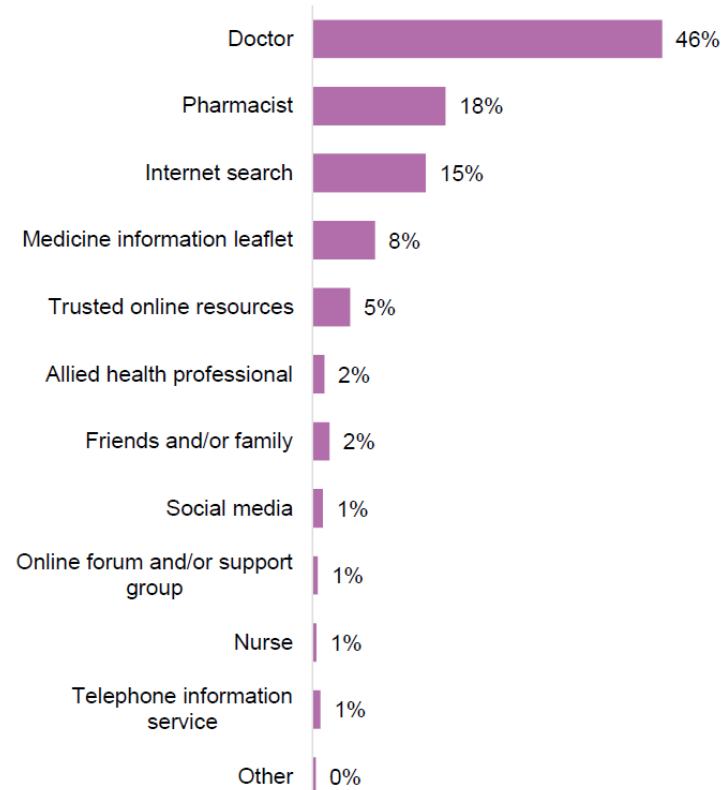
Rating of information sources



Base: 1,503

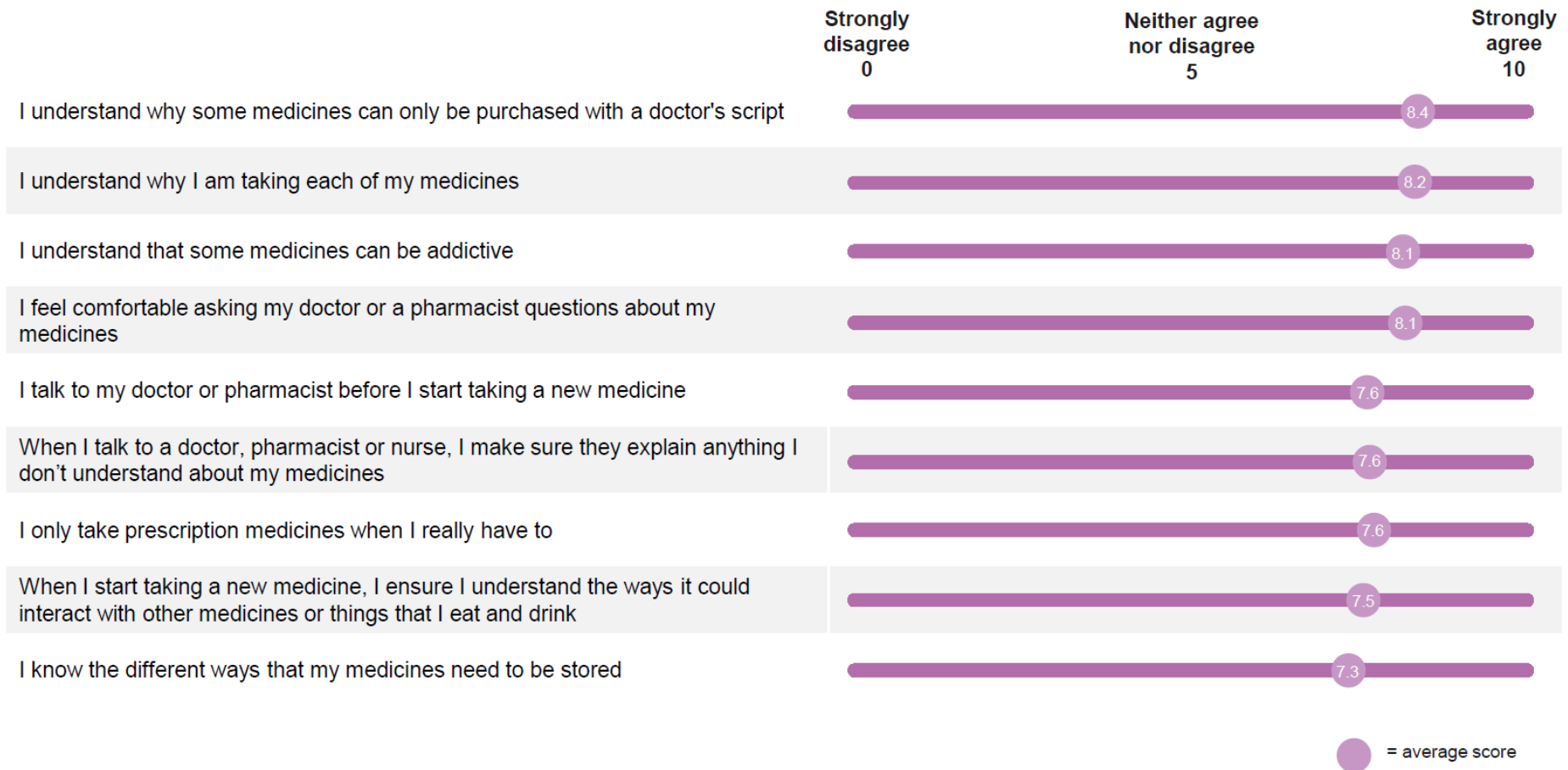
When I want to find out more information about a medicine, I go to...? This question asked respondents to identify their level of agreement for each information source. The average level of agreement (with 0 being strongly disagree and 10 being strongly agree) is provided in the chart above.

Information source most likely to go to



Which of the following would you be most likely to access to find out more information about medicine?

## Attitudinal Statements

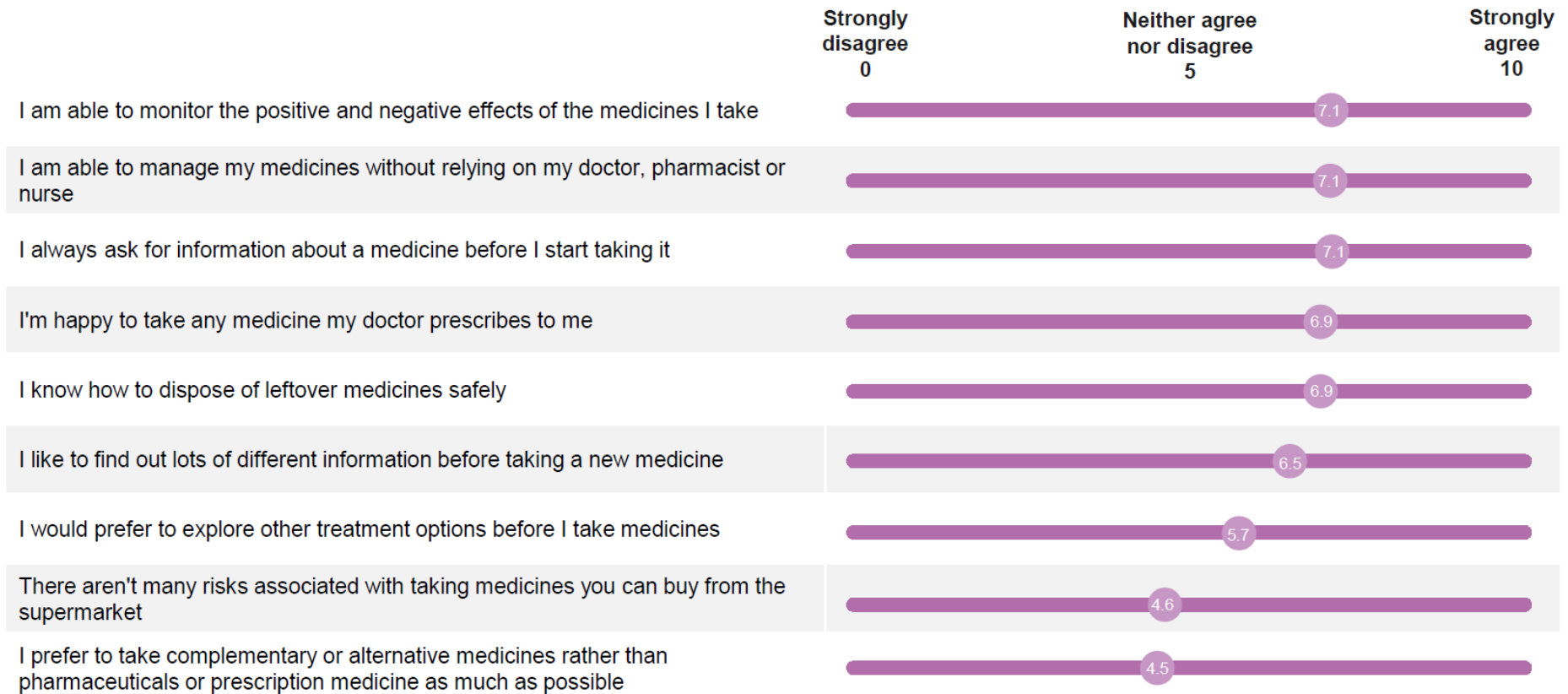


Base: 1,503

For each statement, please indicate the extent to which you agree or disagree.

These questions asked respondents to identify their level of agreement for each statement. The average level of agreement (with 0 being strongly disagree and 10 being strongly agree) is provided above.

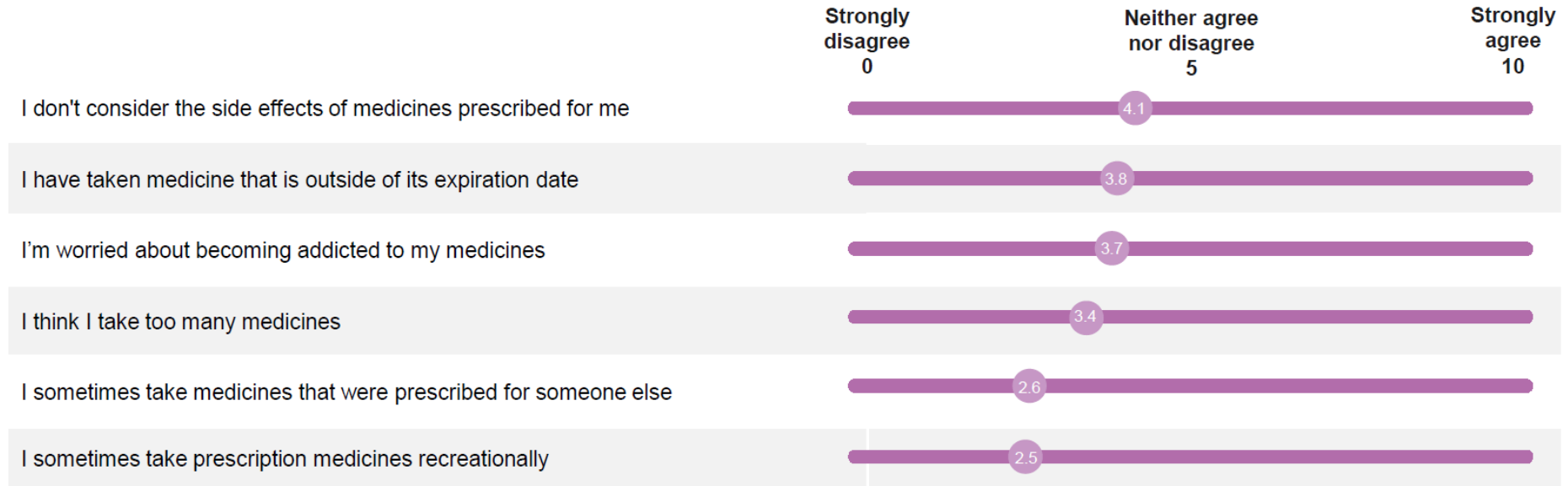
## Attitudinal Statements



Base: 1,503

For each statement, please indicate the extent to which you agree or disagree.

## Attitudinal Statements



Base: 1,503

For each statement, please indicate the extent to which you agree or disagree.

## Segment Profiles

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A segmentation is an approach to analysing survey results that groups respondents into segments based on their attitudes and behaviours. Respondents will have similar attitudes and behaviours within a segment but different attitudes and behaviours across segments.

Respondents for the QUM survey was analysed based on differences in their views around the use of medicines, and more specifically in terms of:

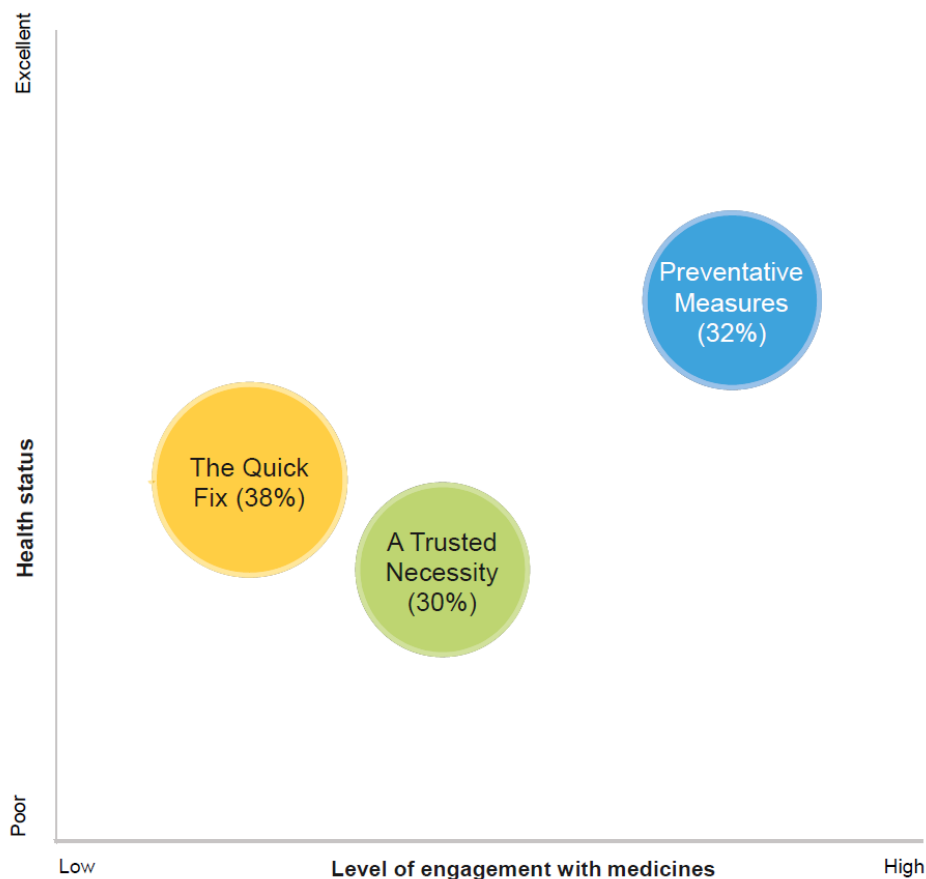
- engagement with medication
- their understanding of QUM
- attitudes towards health professional's role in QUM
- attitudes towards complementary or alternate medicines.

The segmentation analysis identified three segments:

- Segment 1 - 'Preventative Measures'
- Segment 2 – 'A Trusted Necessity'
- Segment 3 – 'The Quick Fix'.

The segments are similar in size, with each comprising of around one-third of respondents.

The graphic below identifies the three segments against their identified health status and level of engagement with medication. Further details on each of the individual segments is provided in the following pages.



## Segment 1: Preventative Measures

### Segment size

- 34% of the sample

### Key demographics

- A larger proportion are female
- Age distribution is aligned with the population
- A high proportion only speak English at home

### People in this segment...

- Have the highest level of health literacy
- Rate their health as 'good' or 'excellent'
- Want to know about the medicine before taking it
- Are Comfortable asking doctor, nurse or pharmacist for information
- Have a preference for alternative over prescription medicines
- Take a preventative approach to health
- Do not regularly take prescription medicines
- Take vitamins or supplements regularly
- Are highly engaged with their health
- Generally have lower usage of healthcare services

### Gender



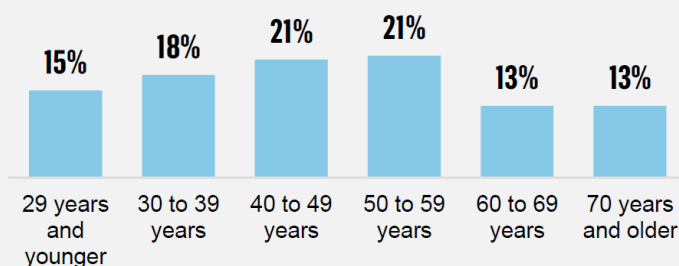
MALE  
40%



FEMALE  
59% ↑ +8%

<1% reported another gender

### Age



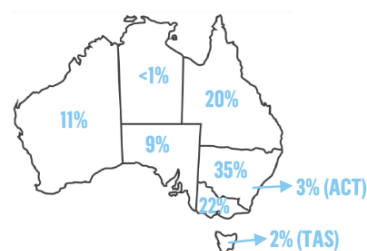
### Culturally and Linguistically Diverse

15% speak a language other than English at home  
↓ -4%

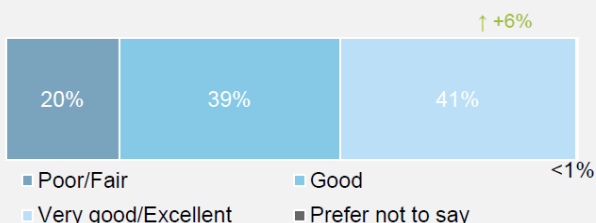
### Regionality

- 81% live in metropolitan areas
- 13% live in inner regional areas
- 5% live in outer regional and remote areas

### Location



### Overall health



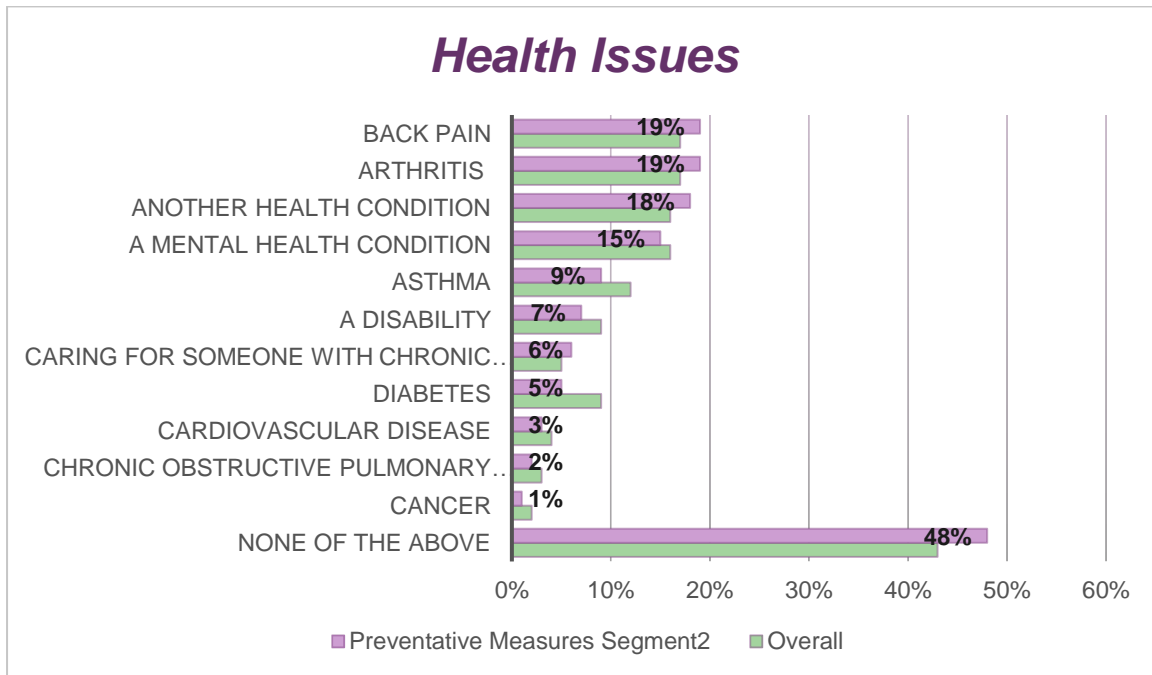
### Health literacy score

AVERAGE SCORE OF  
2.9 OUT OF 4 ↑ +0.3

Respondents were asked a series of eight questions to assess their overall health literacy. A mean across all eight responses was calculated to get an indicative rating of health literacy for each respondent

Higher/lower than total sample ↓ ↑

Note: Total may not add up to 100% due to rounding.

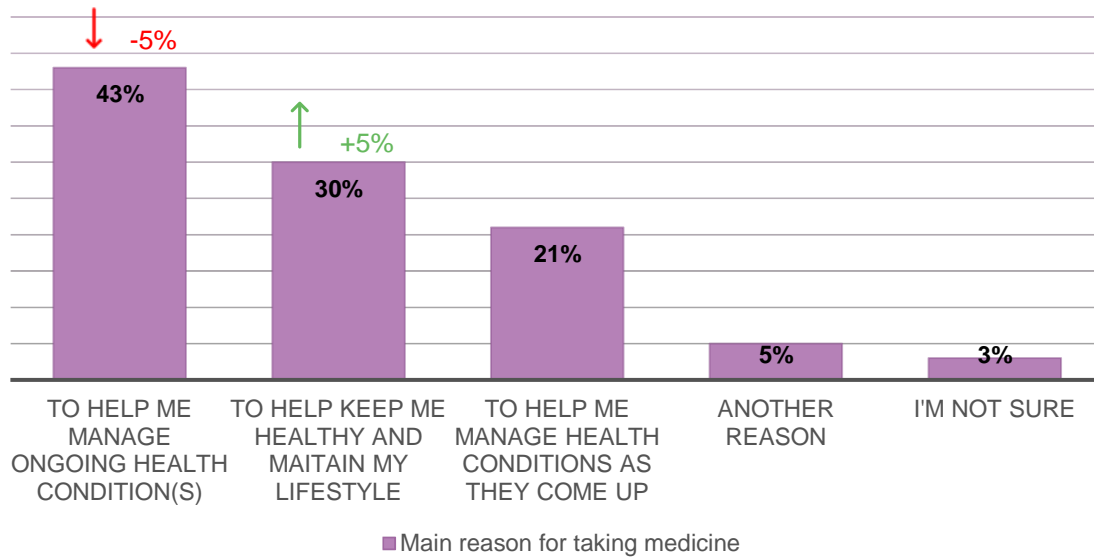


### Top 5 main health issues

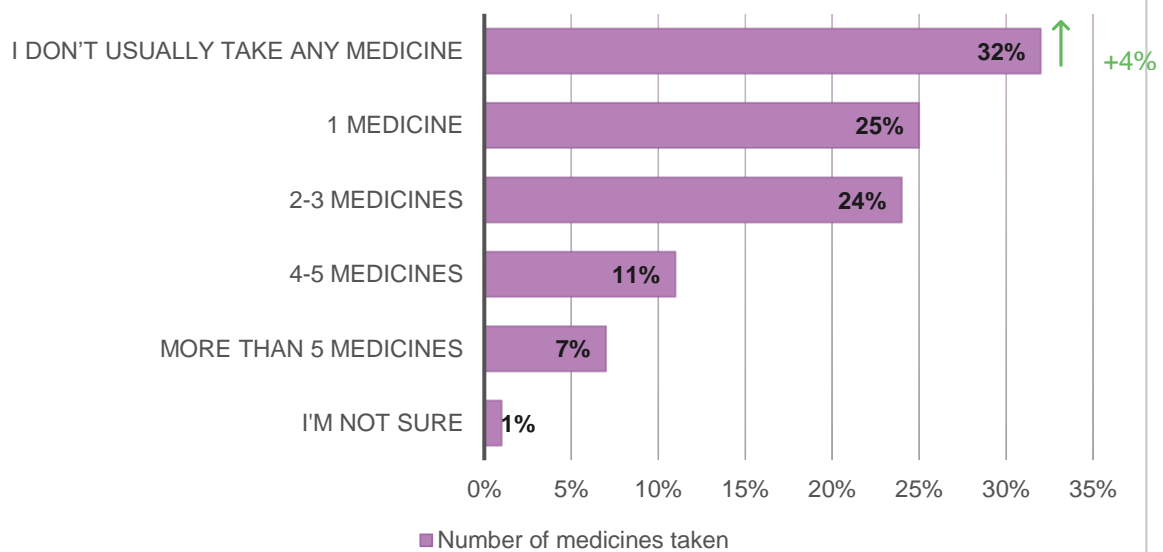
1. Musculoskeletal	26%
2. Mental	13%
3. Blood/Metabolic	9%
4. Other	8%
5. Overweight/obesity	6%



## Main reason for taking medicine

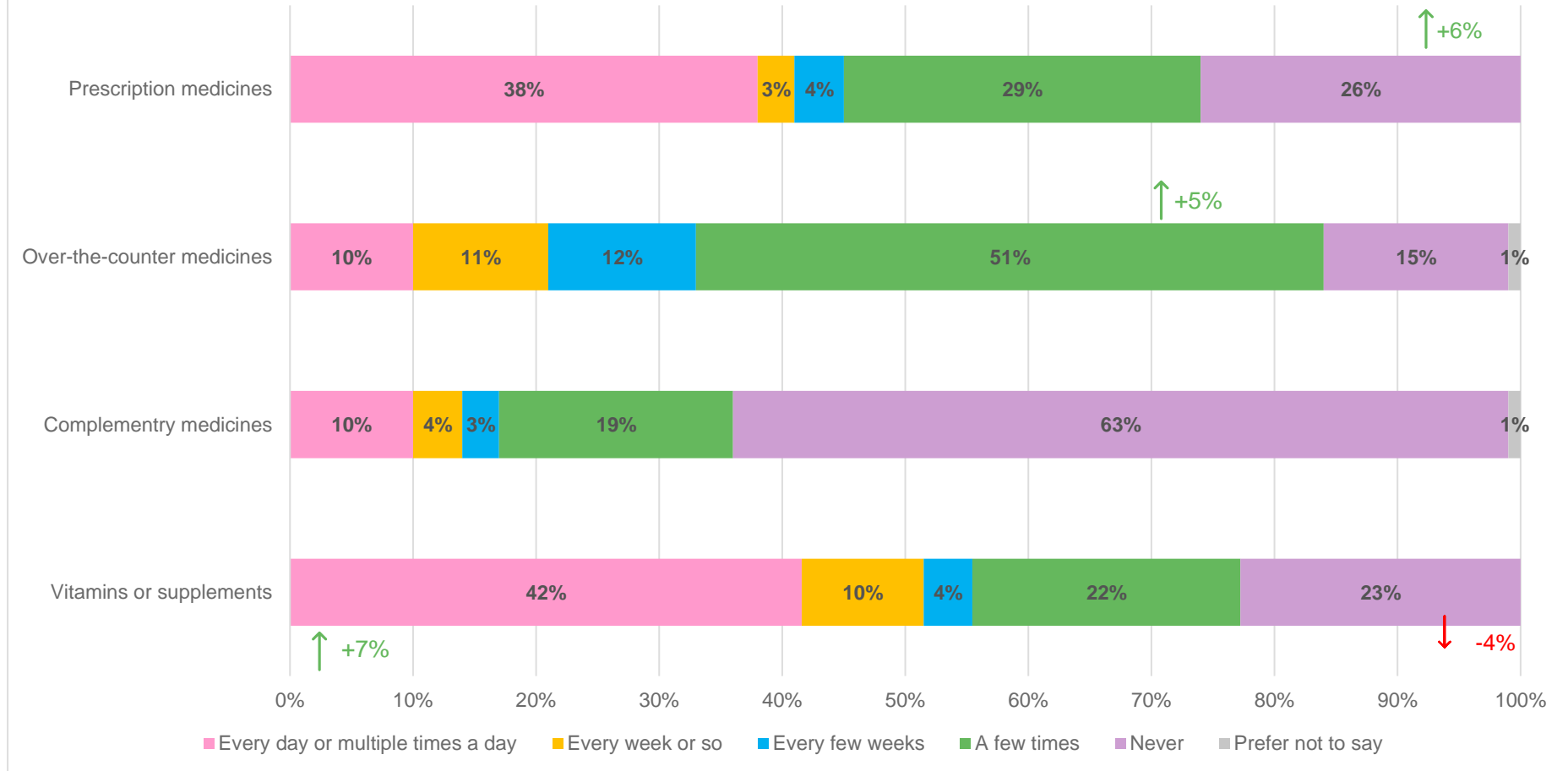


## Number of medicines taken



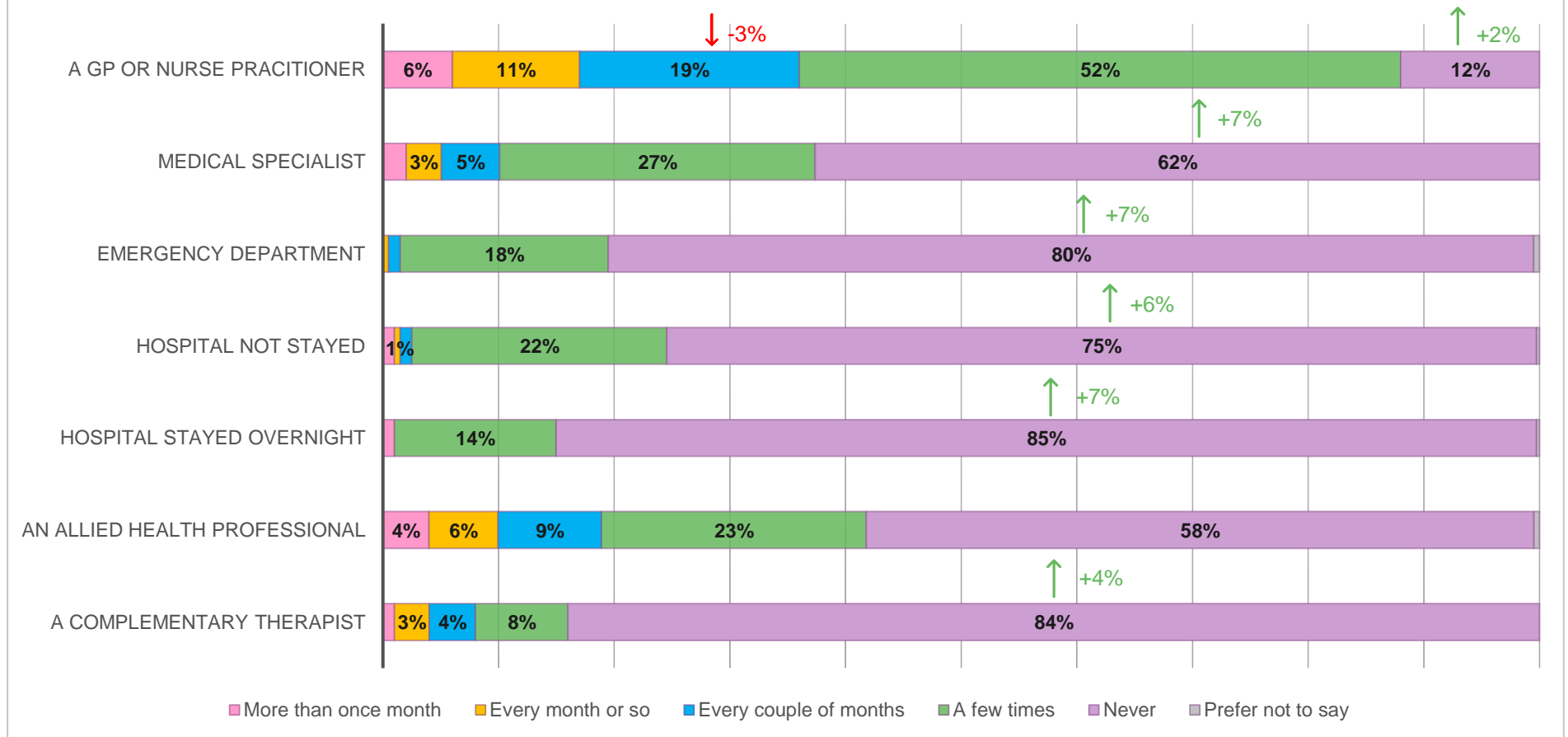
Higher/lower than total sample ↓↑

### Usage of medicines



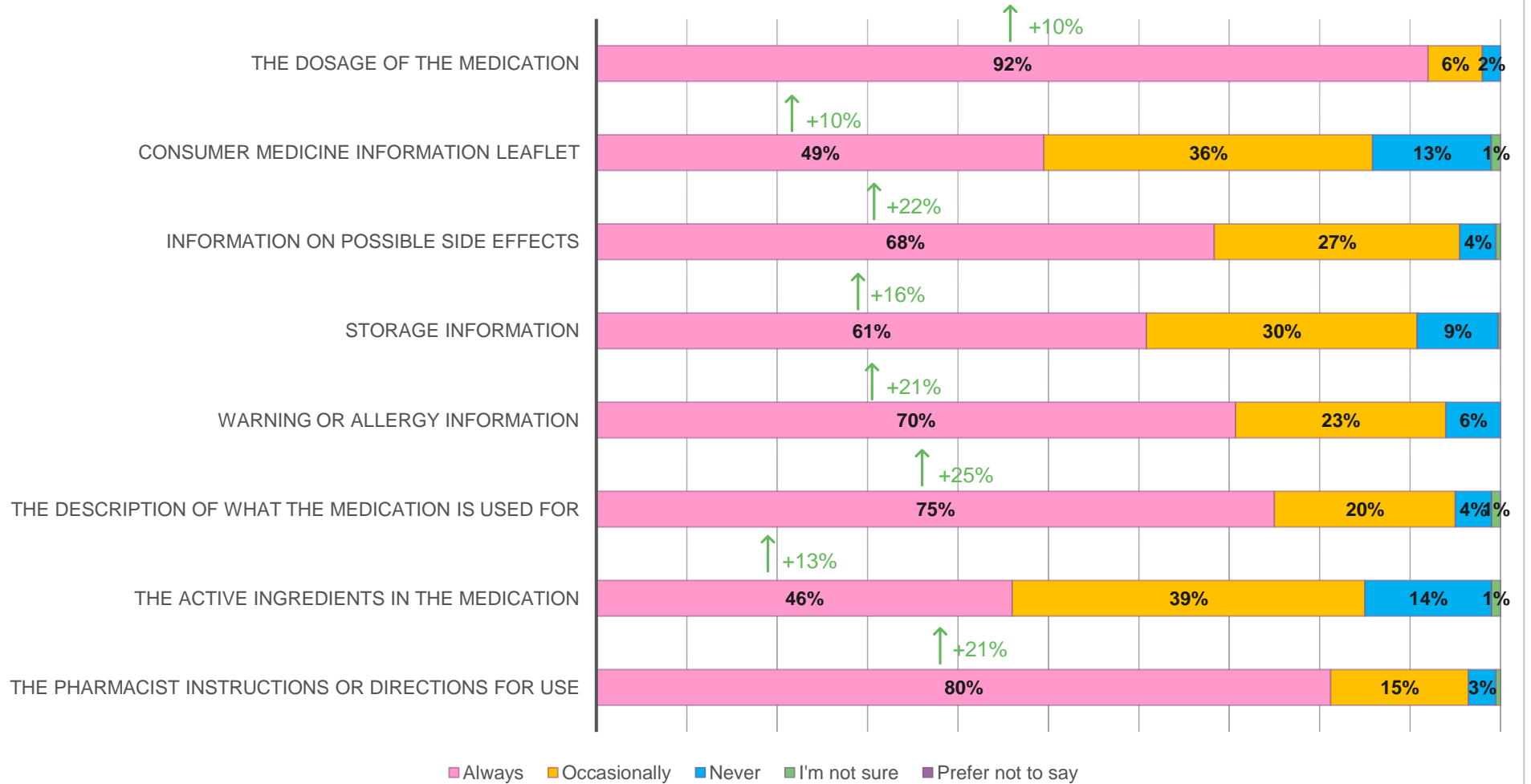
Higher/lower than total sample    ↓↑

## Usages of health services



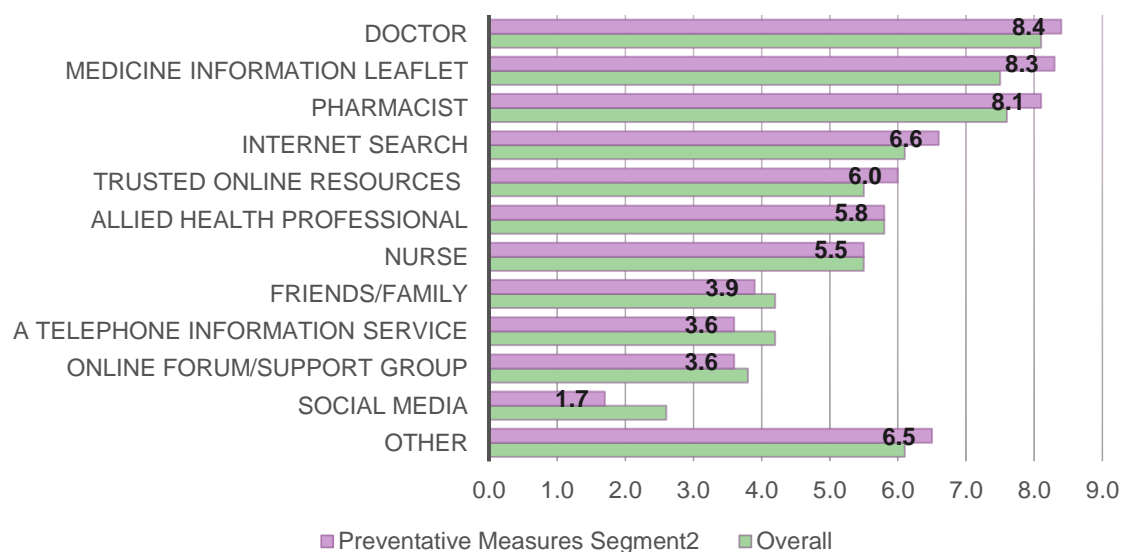
Higher/lower than total sample   ↓ ↑

## Reading information on medicine



Higher/lower than total sample ↓ ↑

## Rating of Information Sources



### Top 5 main information sources

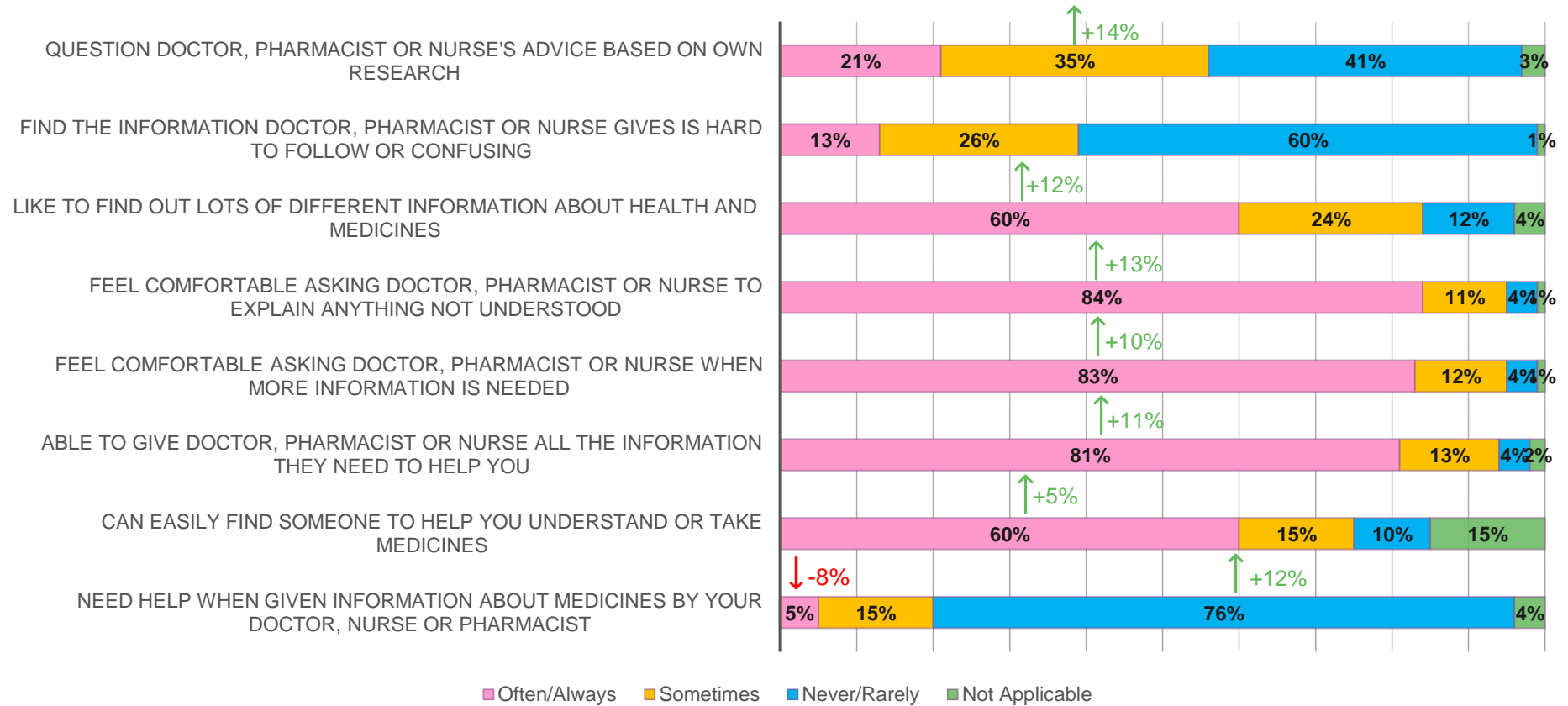
1. A doctor	42%
2. Internet search	19%
3. A pharmacist	19%
4. The information leaflet that comes with the medicine	10%
5. A trusted online resource	8%

*Preventative Measures Segment: Key attitudes*

<i>Scored highest</i>	<i>Difference from average score for all respondents</i>
I would prefer to explore other treatment options before I take medicines	+1.4 ↑
I like to find out lots of different information before taking a new medicine	+1.1 ↑
I only take prescription medicine when I really have to	+1.1 ↑
I understand that some medicines can be addictive	+1.0 ↑
I always ask for information about a medicine before I start taking it	+1.0 ↑
When I talk to a doctor, pharmacist or nurse, I make sure they explain anything that I don't understand about my medicines	+0.9 ↑
When I start taking a new medicine, I ensure I understand the ways it could interact with other medicines or things that I eat and drink	+0.9 ↑
I know the different ways that my medicines need to be stored	+0.6 ↑
I talk to my doctor or pharmacist before I start taking a new medicine	+0.6 ↑
I am able to monitor the positive and negative effects of the medicines I take	+0.5 ↑
I know how to dispose of leftover medicines safely	+0.3 ↑
<i>Scored lowest</i>	
I don't consider the side effects of medicines prescribed for me	-2.3 ↓
I sometimes take medicines that were prescribed for someone else	-1.8 ↓
There aren't many risks associated with taking medicines that you can buy from the supermarket	-1.3 ↓
I'm happy to take any medicine my doctor prescribes to me	-1.2 ↓

Higher/lower than total sample ↓ ↑

## Individual health literacy indicators



Higher/lower than total sample ↓ ↑

## Segment 2: A Trusted Necessity

### Segment size

- 30% of the sample

### Key demographics

- A larger proportion are male
- Slightly older, with 61% aged 50 years and over
- A higher proportion only speak English at home
- A higher proportion live in regional areas

### People in this segment...

- Have a good level of health literacy
- Rate their health as 'fair' or 'good'
- Have a higher level of arthritis, diabetes and other health conditions
- Tend to take two or more medicines a day
- Take medication to manage ongoing health conditions
- Prefer prescription drugs over alternatives
- Generally have lower usage of health services
- Are happy to take medicine recommended by their doctor
- Feel that they are able to self-manage their medication
- Have lower concerns about taking too many medicines

### Gender



FEMALE

39%

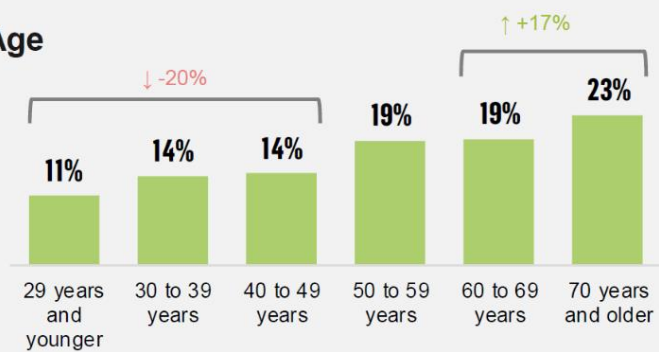


MALE

61% ↑ +12%

<1% reported another gender

### Age



### Culturally and Linguistically Diverse

8% speak a language other than English at home  
↓ -9%

### Regionality

73% live in metropolitan areas  
20% live in inner regional areas ↑ +6%  
7% live in outer regional and remote areas

### Location



### Overall health



### Health literacy score

AVERAGE SCORE OF 2.8 OUT OF 4 ↑ +0.2

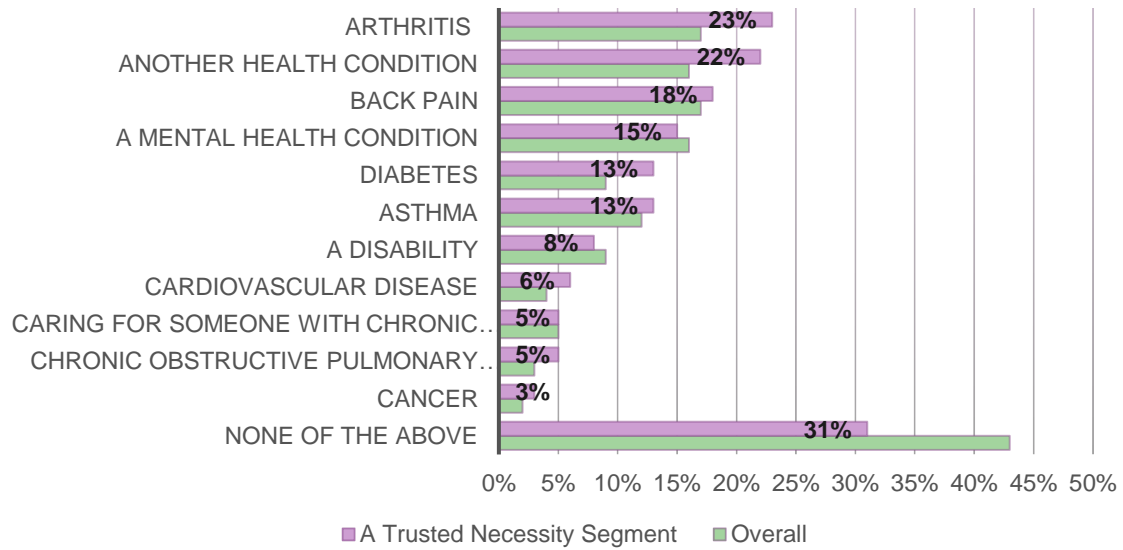
Respondents were asked a series of eight questions to assess their overall health literacy. A mean across all eight responses was calculated to get an indicative rating of health literacy for each respondent

Higher/lower than total sample ↓ ↑

Note: Total may not add up to 100% due to rounding.



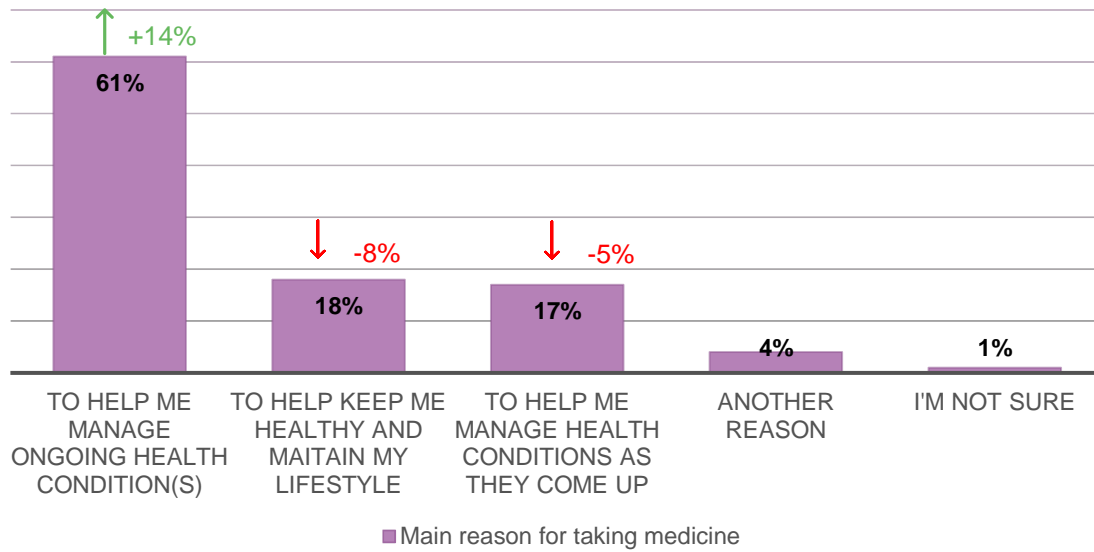
## Health Issues



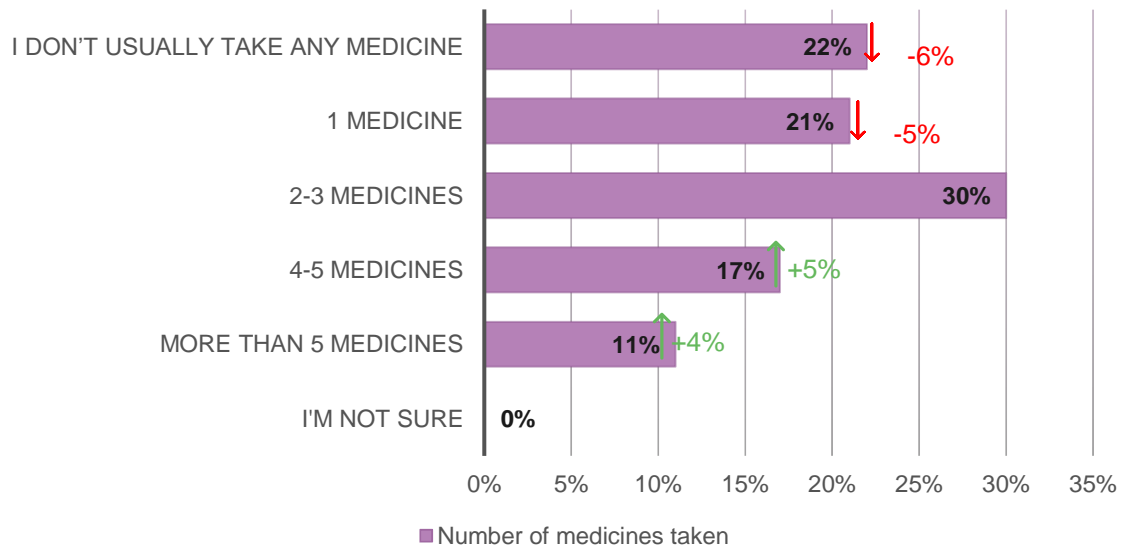
### Top 5 health issues

1. Musculoskeletal	22%
2. Blood/Metabolic	12%
3. Mental	10%
4. Endocrine	9%
5. Respiratory	9%

## Main reason for taking medicine

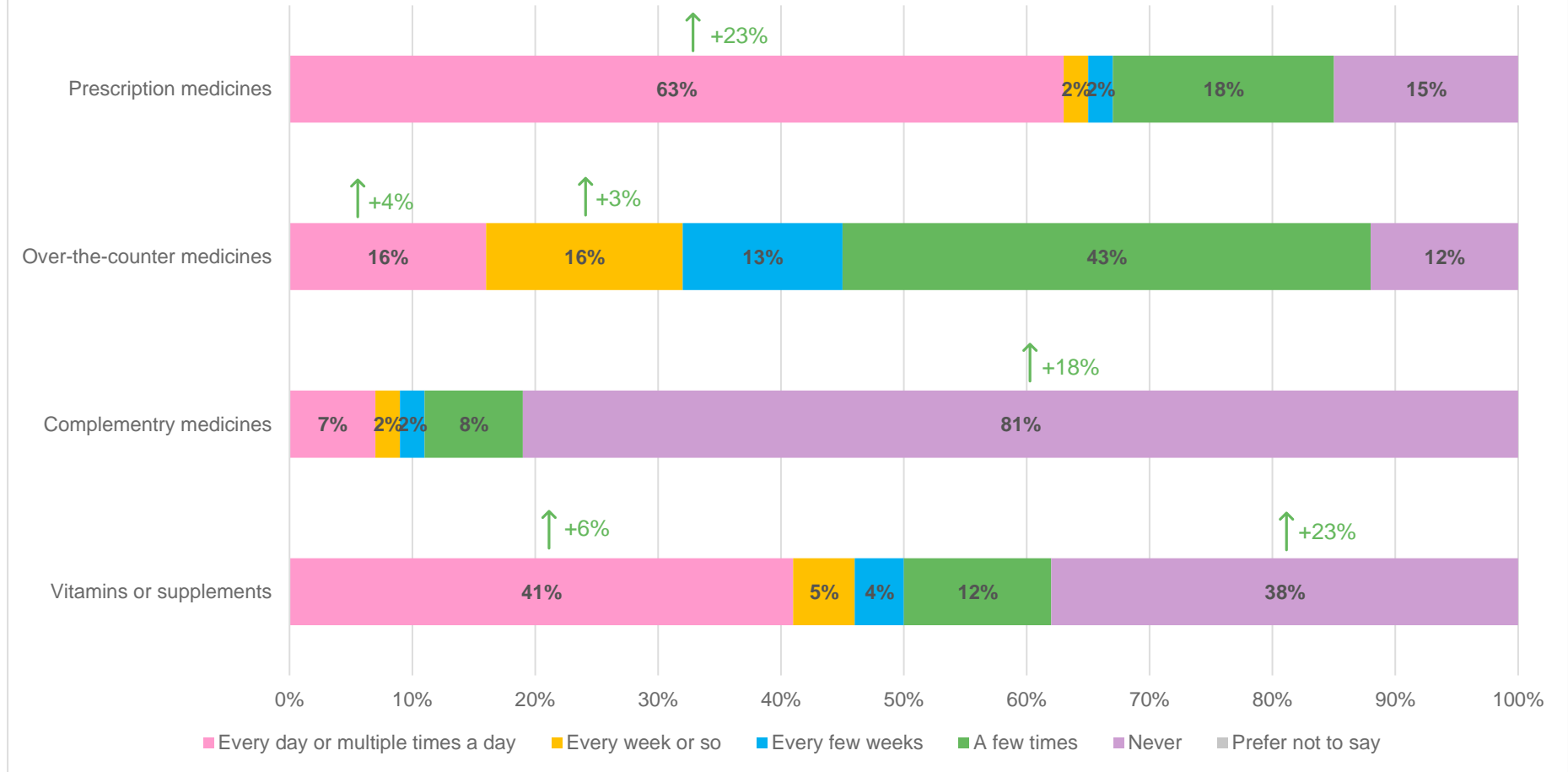


## Number of medicines taken



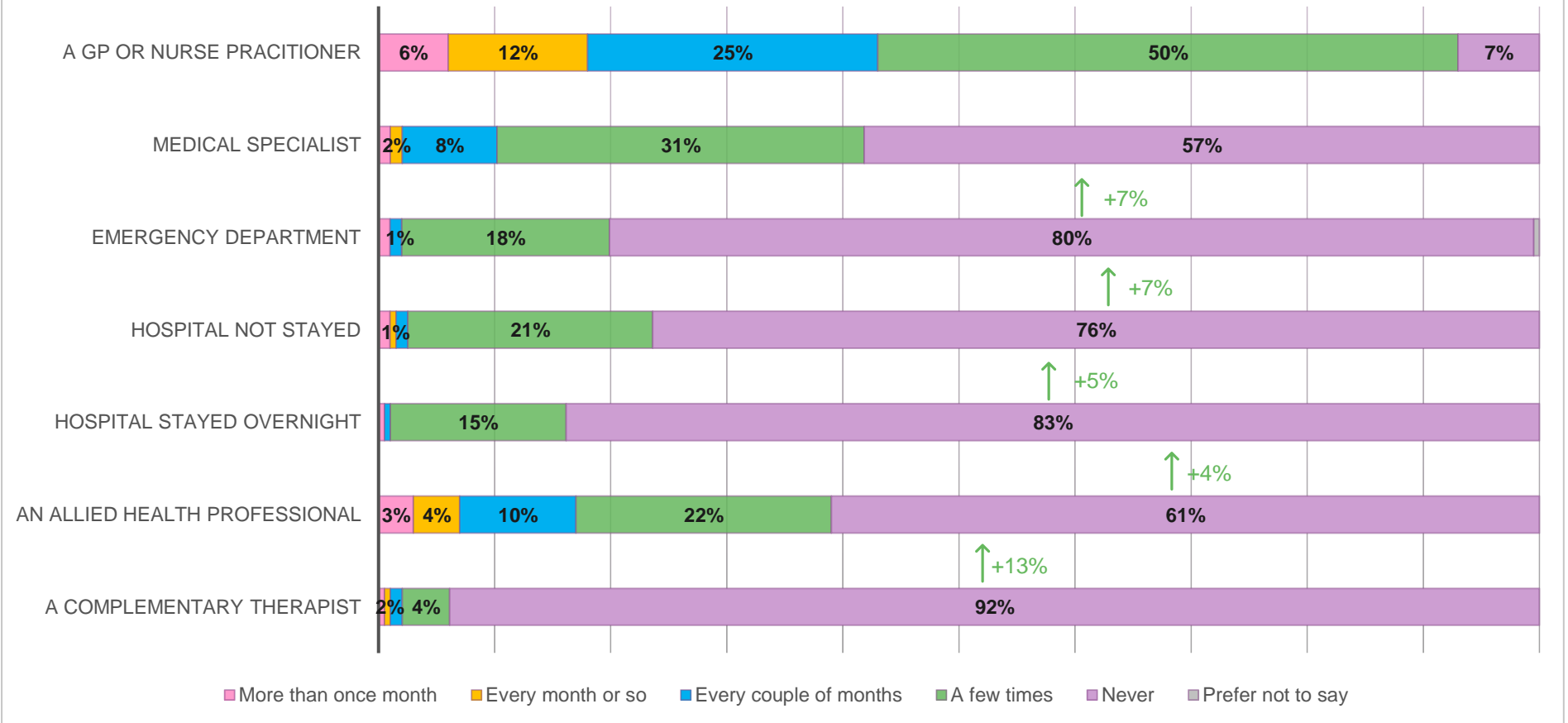
Higher/lower than total sample ↓↑

### Usage of medicines



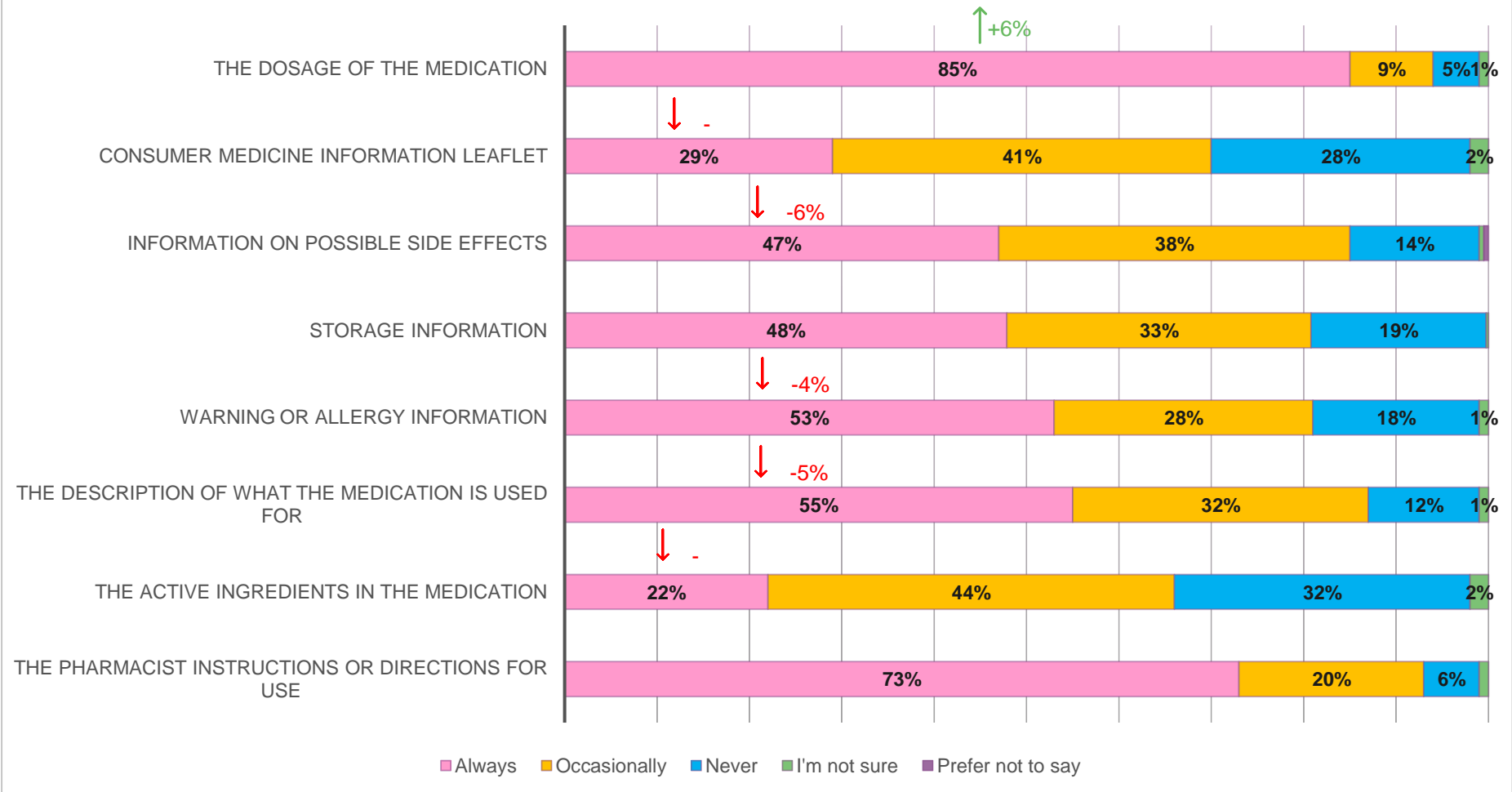
Higher/lower than total sample ↓↑

## Usages of health services



Higher/lower than total sample   ↓ ↑

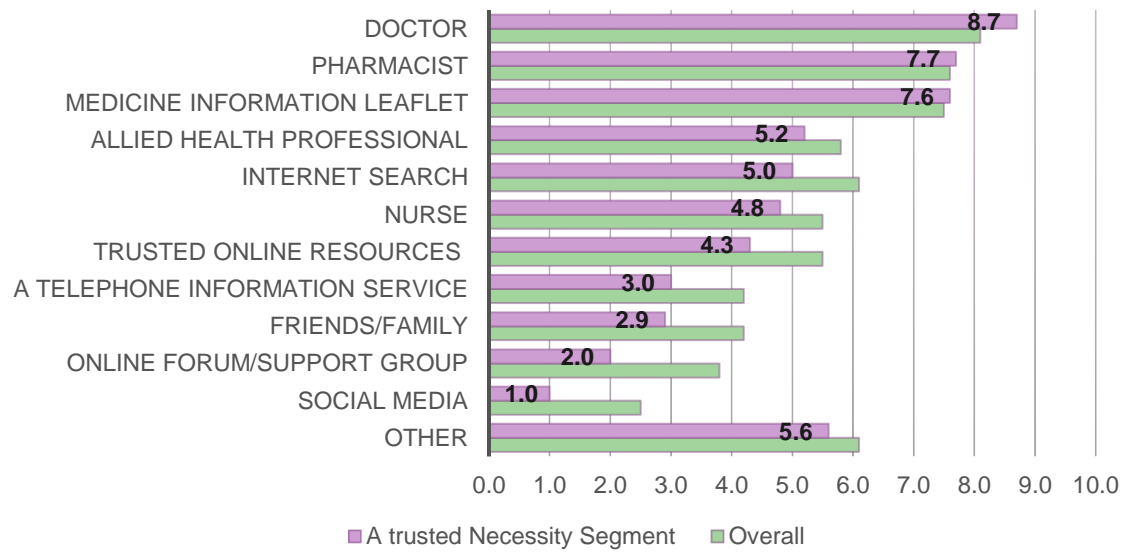
## Reading information on medicine



Higher/lower than total sample



## Rating of Information Sources



### Top 5 main information sources

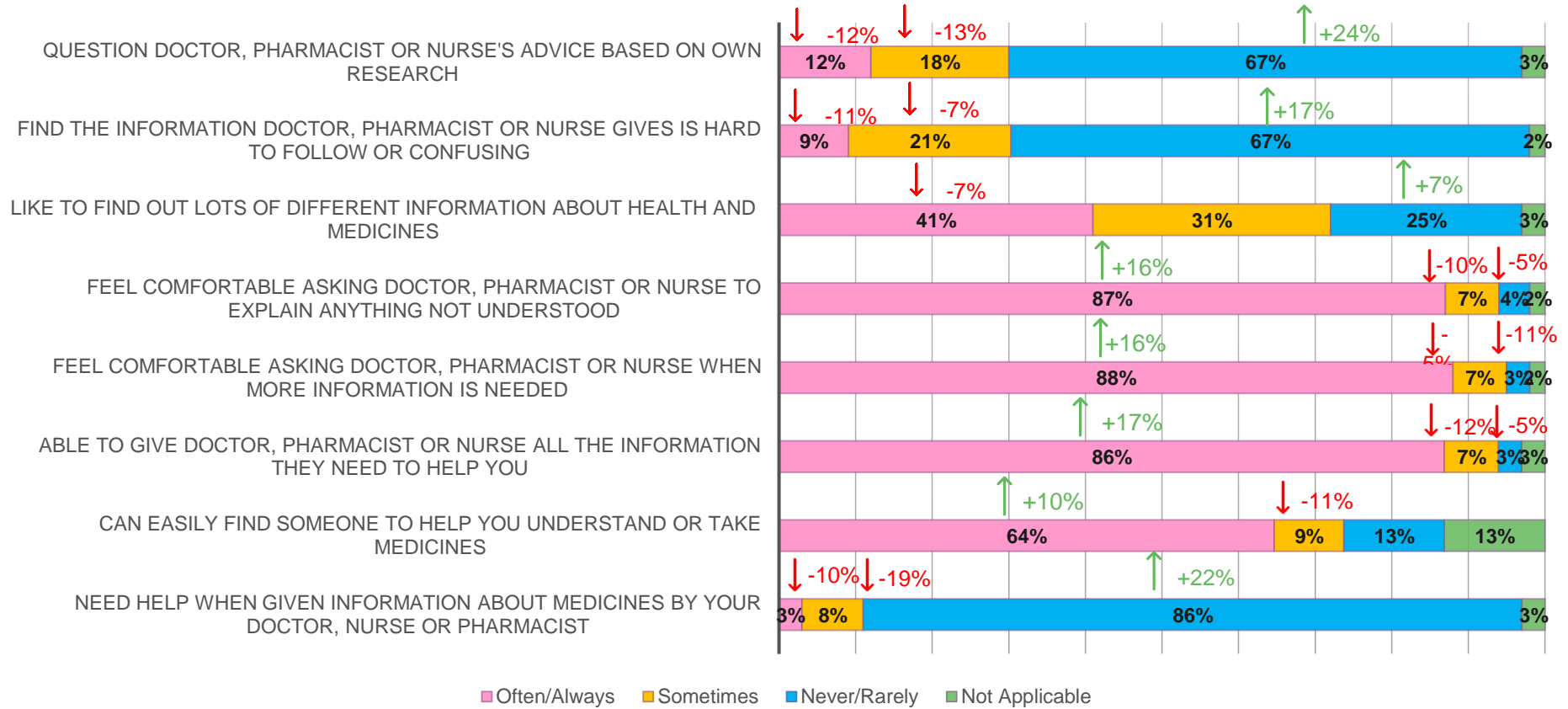
1. A doctor	56%
2. A pharmacist	18%
3. Internet search	11%
4. The information leaflet that comes with the medicine	9%
5. A trusted online resource	3%

## A Trusted Necessity Segment: Key Attitudes

<i>Scored highest</i>	<i>Difference from average score for all respondents</i>
I'm happy to take any medicine my doctor prescribes to me	+1.6 ↑
I understand why some medicines can only be purchased with a doctor's script	+0.9 ↑
I feel comfortable asking my doctor or a pharmacist questions about my medicines	+0.9 ↑
I understand why I am taking each of my medicines	+0.8 ↑
I am able to manage my medicines without relying on my doctor, pharmacist or nurse	+0.7 ↑
<i>Scored lowest</i>	
I think I take too many medicines	-1.2 ↓
I have taken medicine that is outside of its expiration date	-1.3 ↓
I like to find out lots of different information before taking a new medicine	-1.3 ↓
I'm worried about becoming addicted to my medicines	-1.7 ↓
I sometimes take prescription medicines recreationally	-1.9 ↓
I would prefer to explore other treatment options before I take medicines	-2.3 ↓
I prefer to take complementary or alternative medicines rather than pharmaceuticals or prescription medicines as much as possible	-2.5 ↓

Higher/lower than total sample ↓↑

## Individual health literacy indicators



Higher/lower than total sample





## Segment 3: The Quick Fix

### Segment size

- 38% of the sample

### Key demographics

- A slightly higher proportion are female
- Slightly younger, with 57% aged 39 years or younger
- A higher proportion speak another language other than English at home
- A higher proportion identified as Aboriginal and/or Torres Strait Islander
- Slightly higher proportion live in metropolitan areas
- A higher proportion hold a bachelors degree or higher

### People in this segment...

- Have lower levels of health literacy
- Rate their health as 'good'
- Generally don't have any ongoing health conditions
- Take medication to manage health conditions as they come up and maintain a healthy lifestyle
- Take around one or two medicines each day
- Have higher levels of health care service usage
- Are less engaged with medicines
- Are happy to take what their doctor recommends

### Gender



FEMALE

54% ↑ +3%

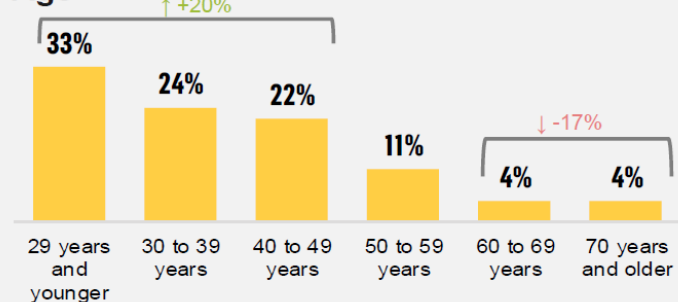


MALE

46%

<1% reported another gender

### Age



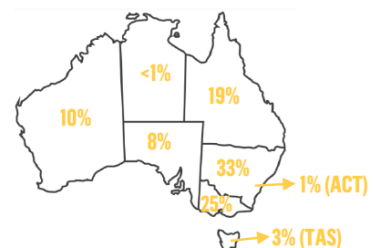
### Culturally and Linguistically Diverse

25% speak a language other than English at home  
↑ +8%

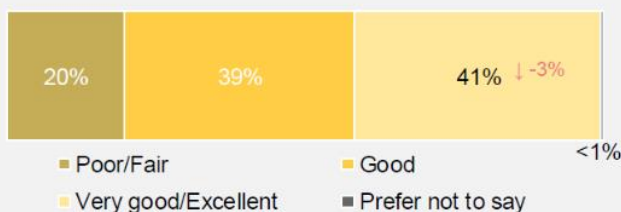
### Regionality

- 83% live in metropolitan areas ↑ +3%
- 11% live in inner regional areas
- 6% live in outer regional and remote areas

### Location



### Overall health



### Health literacy score

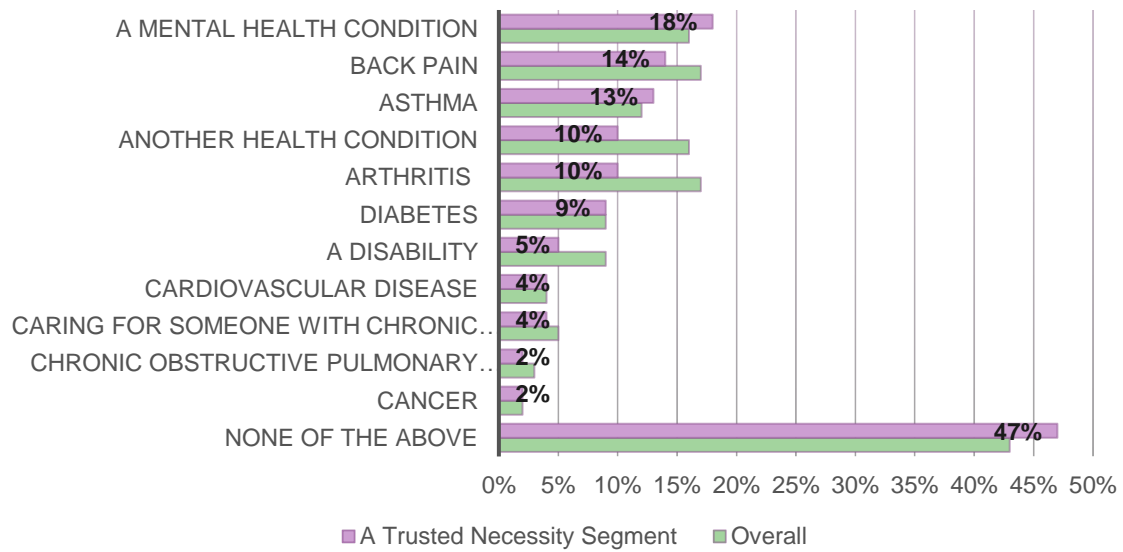
AVERAGE SCORE OF 2.3 OUT OF 4 ↓ -0.4

Respondents were asked a series of eight questions to assess their overall health literacy. A mean across all eight responses was calculated to get an indicative rating of health literacy for each respondent

Higher/lower than total sample ↓ ↑

Note: Total may not add up to 100% due to rounding.

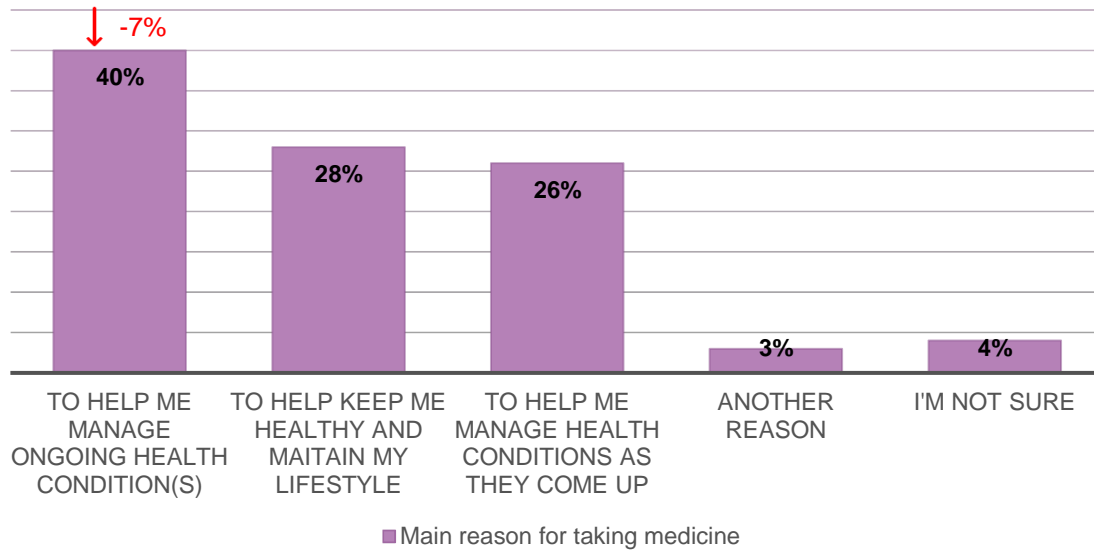
## Health Issues



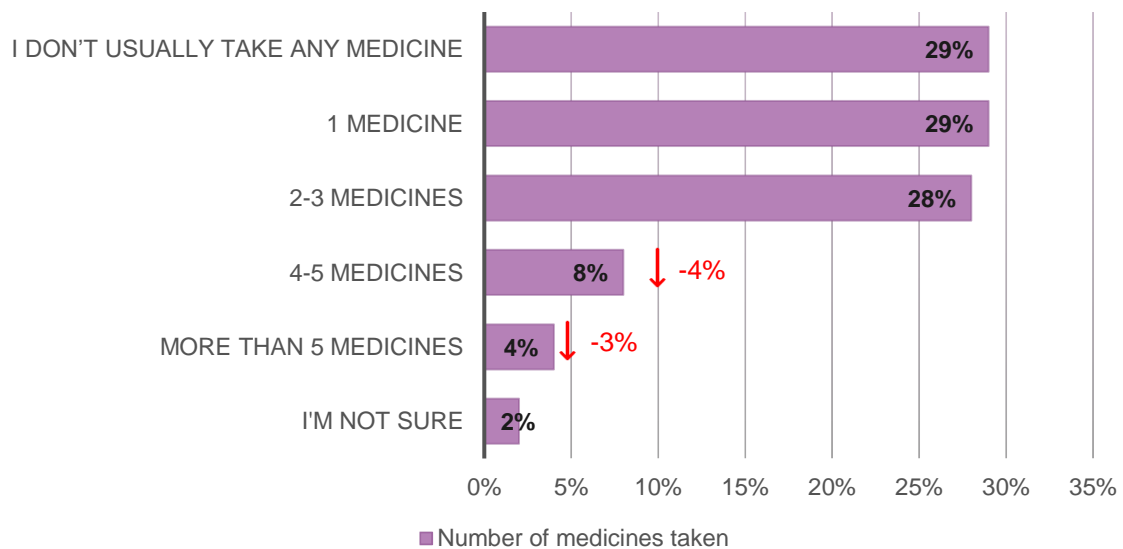
### Top 5 main health issues

1. Musculoskeletal	13%
2. Mental	13%
3. Other	11%
4. Blood/Metabolic	6%
5. Overweight/Obesity	5%

## Main reason for taking medicine

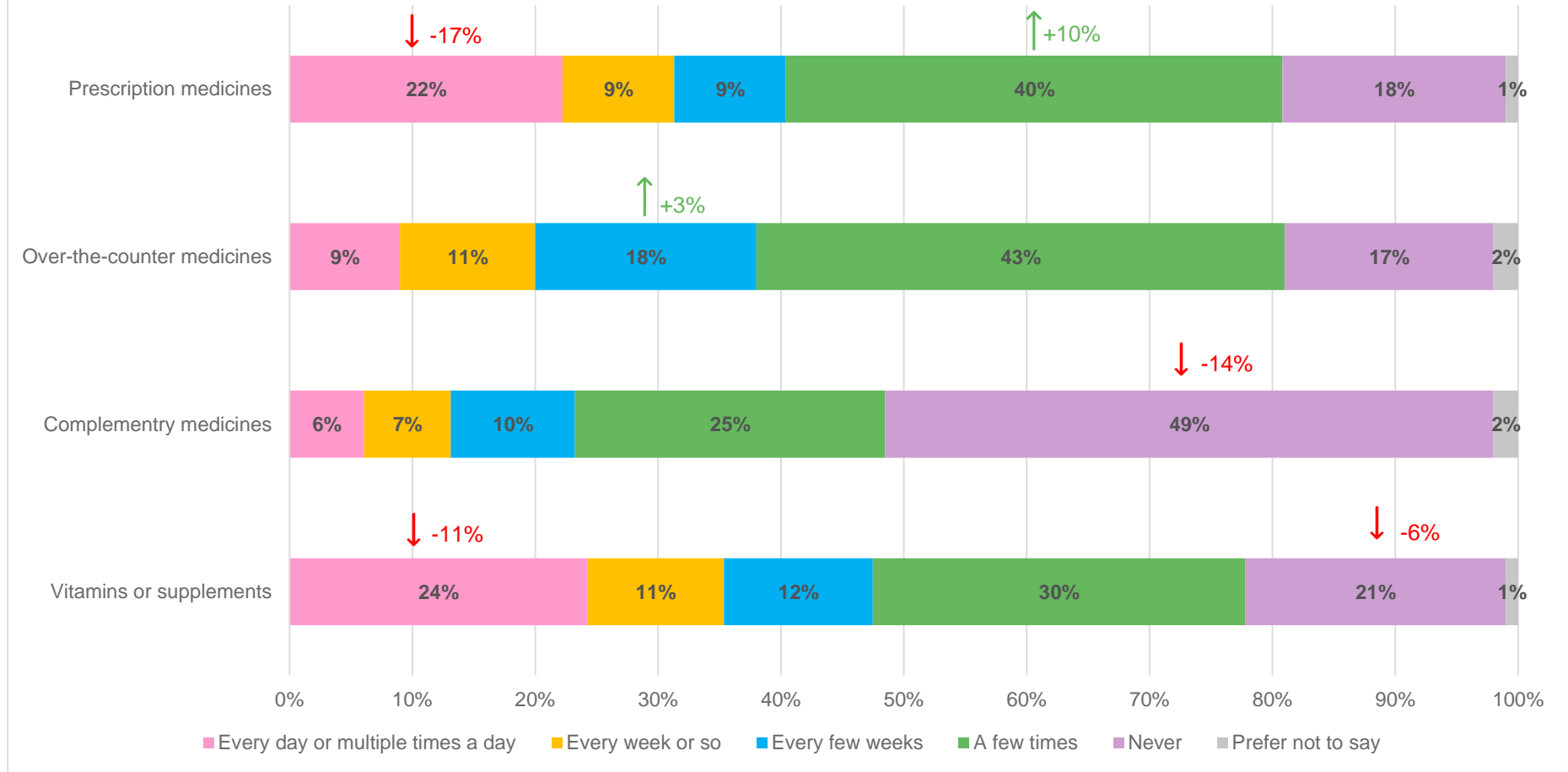


## Number of medicines taken



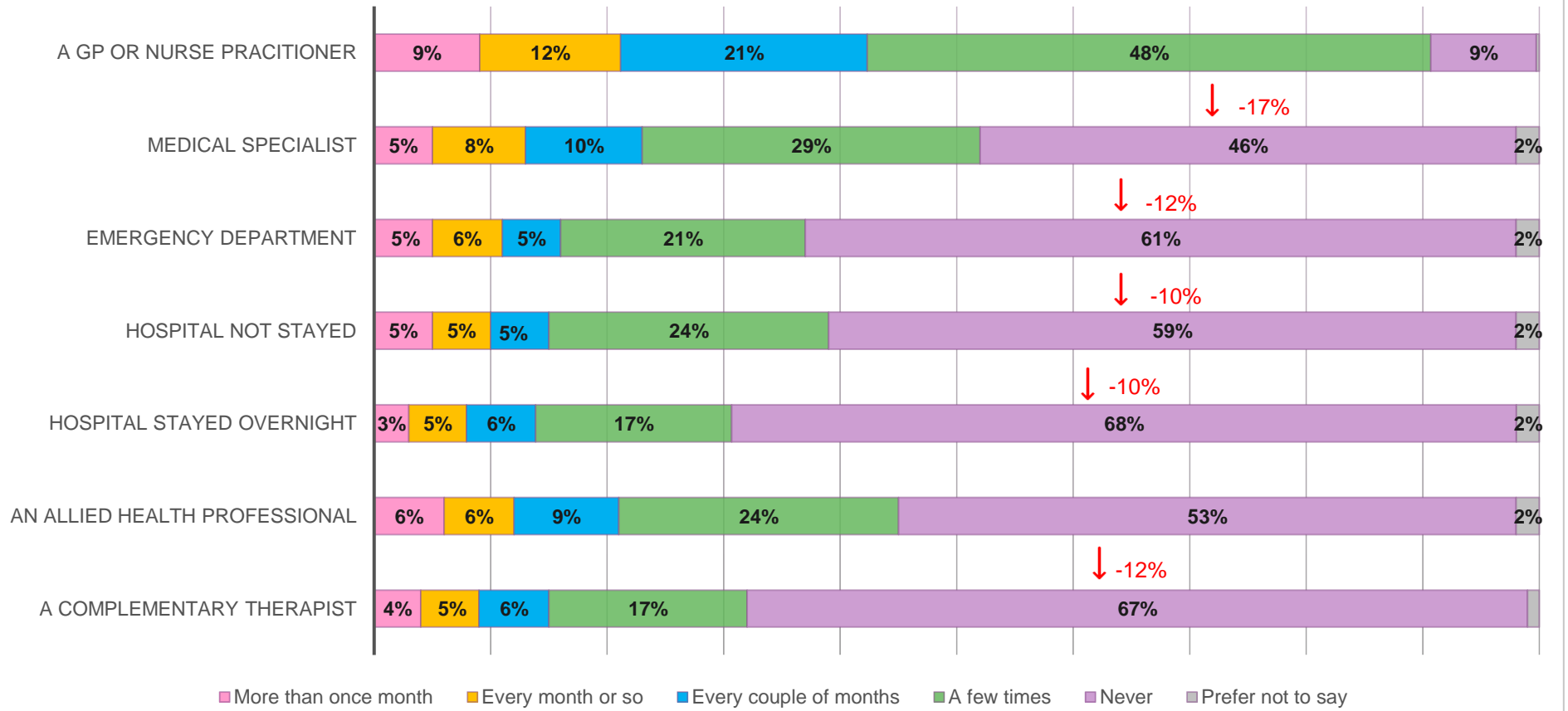
Higher/lower than total sample ↓↑

### Usage of medicines



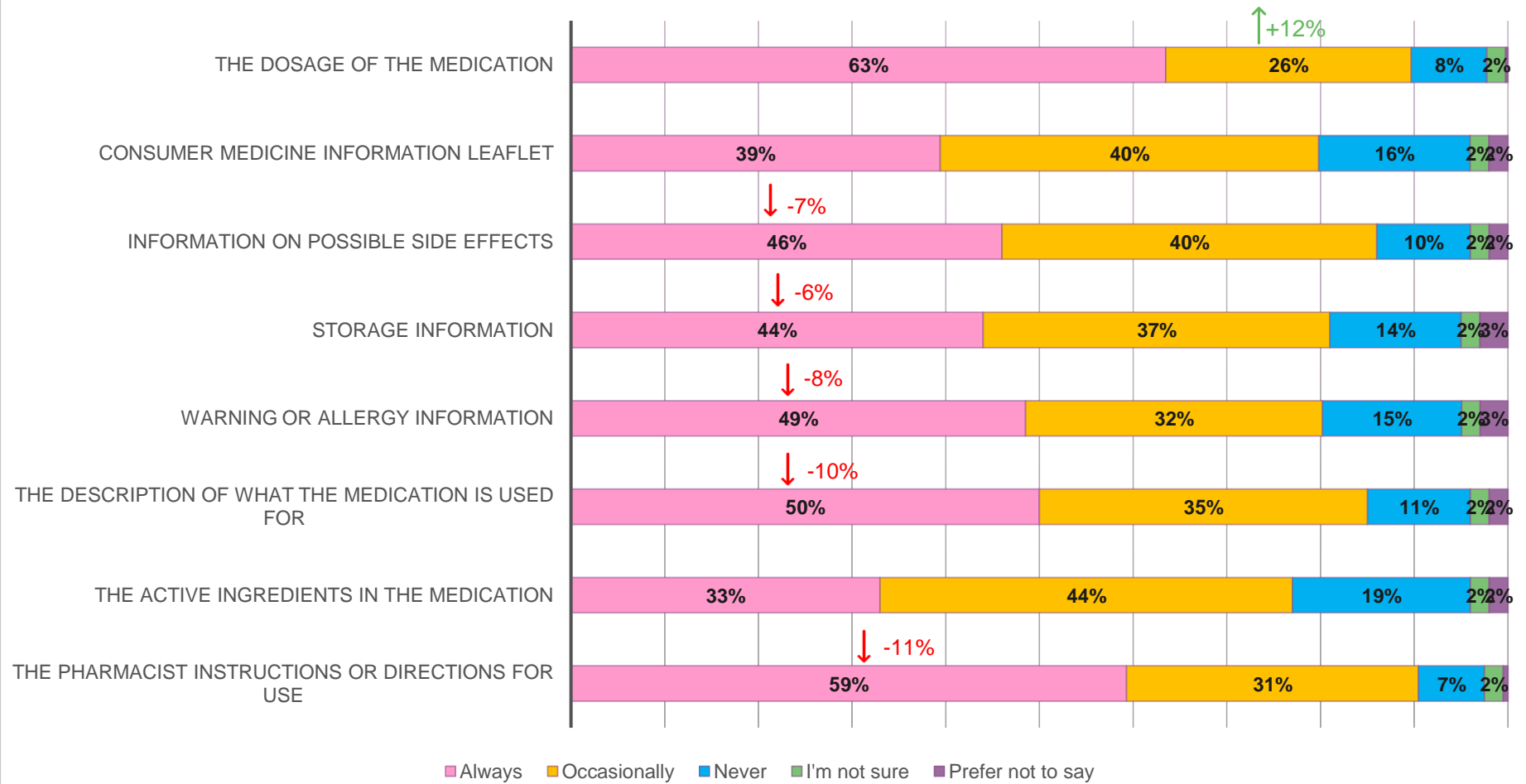
Higher/lower than total sample ↓↑

## Usages of health services



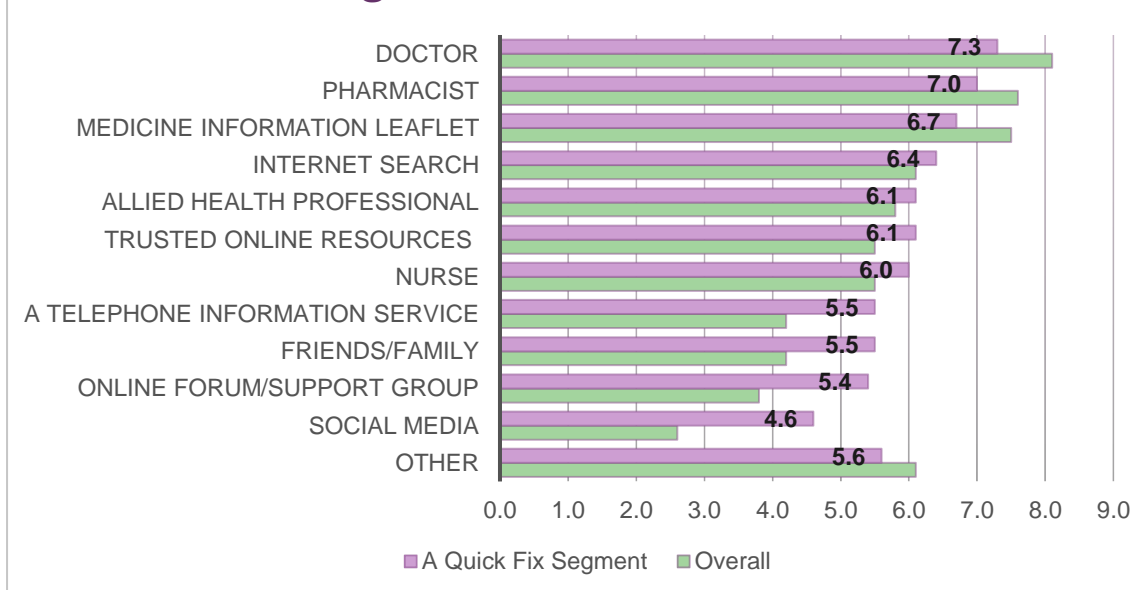
Higher/lower than total sample ↓↑

## Reading information on medicine



Higher/lower than total sample    ↓    ↑

## Rating of Information Sources



### Top 5 main information sources

1. A doctor	42%
2. A pharmacist	16%
3. Internet search	15%
4. The information leaflet that comes with the medicine	6%
5. Friends and/or family	5%

## The Quick Fix Segment: Key Attitudes

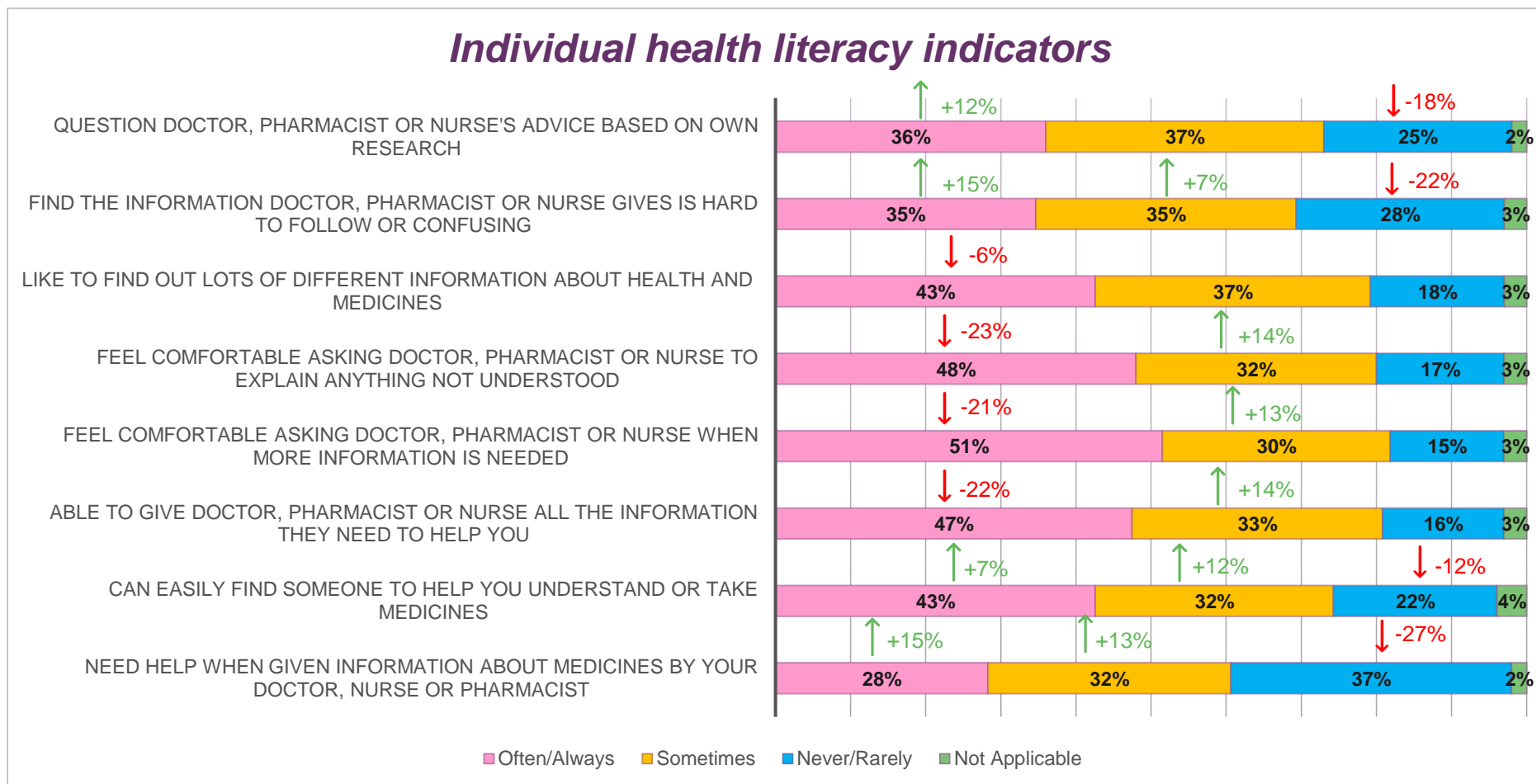
<i>Scored highest</i>	<i>Difference from average score for all respondents</i>
I sometimes take prescription medicines recreationally	+3.1 ↑
I sometimes take medicines that were prescribed for someone else	+2.9 ↑
I'm worried about becoming addicted to my medicines	+2.1 ↑
I think I take too many medicines	+2.0 ↑
I have taken medicine that is outside of its expiration date	+2.0 ↑
I don't consider the side effects of medicines prescribed for me	+1.8 ↑
There aren't many risks associated with taking medicines you can buy from the supermarket	+1.4 ↑
I prefer to take complementary or alternative medicines rather than pharmaceuticals or prescription medicine as much as possible	+1.4 ↑
<i>Scored lowest</i>	
I am able to monitor the positive and negative effects of the medicines I take	-0.5 ↓
I always ask for information about a medicine before I start taking it	-0.5 ↓
I know how to dispose of leftover medicines safely	-0.5 ↓
I am able to manage my medicines without relying on my doctor, pharmacist or nurse	-0.7 ↓
I know the different ways that my medicines need to be stored	-0.8 ↓
I talk to my doctor or pharmacist before I start taking a new medicine	-0.9 ↓
When I start taking a new medicine, I ensure I understand the ways it could interact with other medicines or things that I eat and drink	-0.9 ↓
When I talk to a doctor, pharmacist or nurse, I make sure they explain anything that I don't understand about my medicines	-1.1 ↓
I only take prescription medicines when I really have to	-1.2 ↓
I understand why I am taking each of my medicines	-1.2 ↓
I feel comfortable asking my doctor or a pharmacist questions about my medicines	-1.3 ↓
I understand why some medicines can only be purchased with a doctor's script	-1.4 ↓
I am able to monitor the positive and negative effects of the medicines I take	-1.4 ↓

Higher/lower than total sample





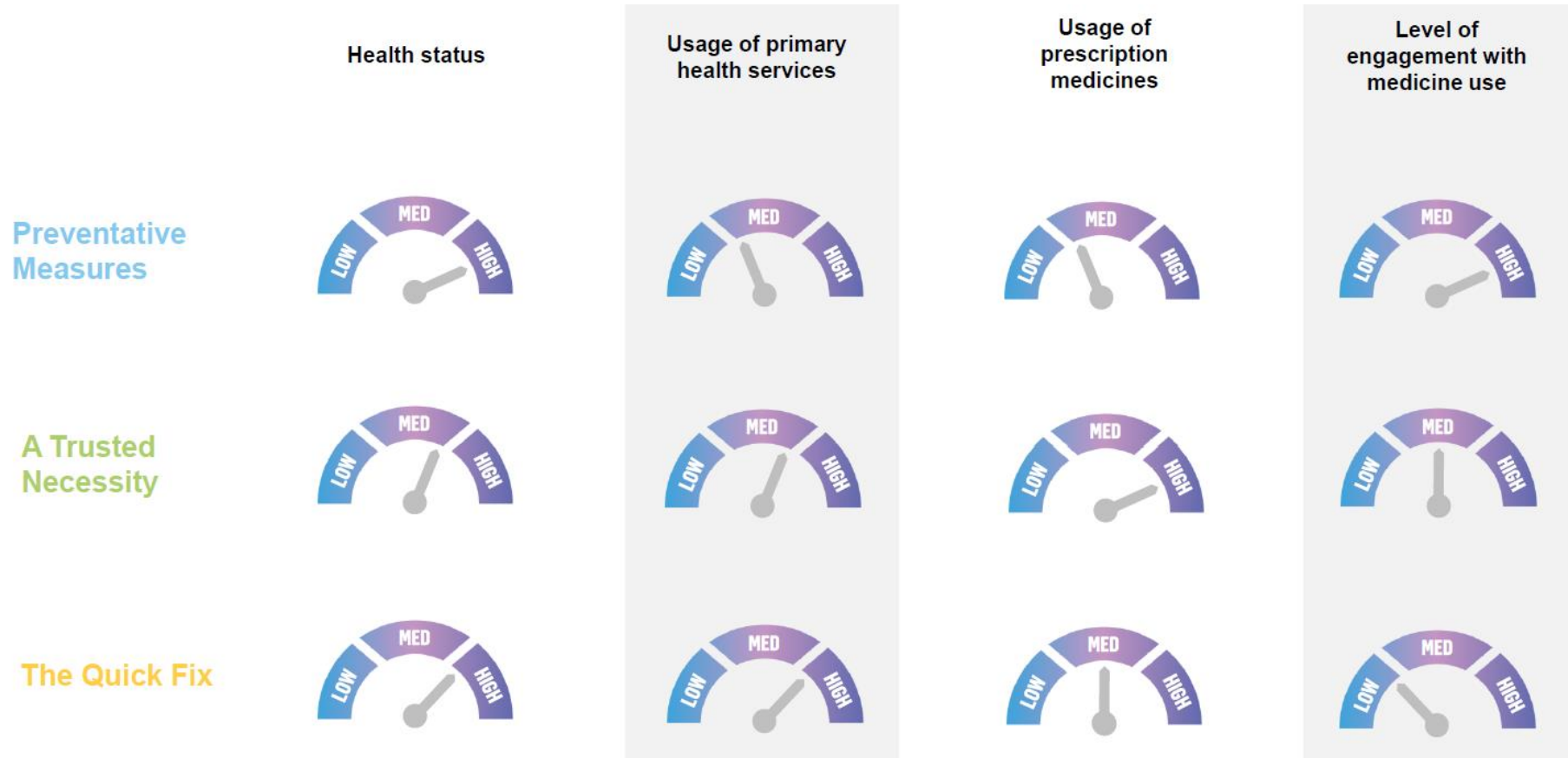
## The Quick Fix Segment: Individual Health Literacy Indicators



Higher/lower than total sample    ↓↑

## Segments by key areas

The following two pages provide an indicative overview of how each of the segments rate against the key theme areas within the survey.



## Segments by key areas



\*Responses to questions regarding health literacy in the questionnaire were recoded and a mean rating across all questions allocated to each respondent with 0 being the lowest possible rating and 4 being the highest. The rating above indicates the mean for each segment. Refer to pages 5 of this report for further information regarding the interpretation of health literacy within this report.

## Conclusion

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The Consumer Segmentation Survey was the final project activity for the Consumer Health Literacy Segmentation and Activation Research project. This report provided an overview of results of the online survey of n=1,503 people aged over 18 across Australia. The report outlined:

- Methodology
- Overall survey findings
- Segmentation analysis.

The overall survey findings provided analysis of the survey across all respondents while the segmentation analysis provided details of the profile of each of the three segments. The findings from the Consumer Segmentation Survey, together with the findings of the Rapid Literature Review on Health Literacy and Quality Use of Medicines, and the Virtual Consumer Led Discussions will be used to inform the Final Project Report and recommendations.