



# Press Release

## Global Views on Healthcare

### Summary of Findings

#### Personal Health Perceptions

##### *Perceived Good Health*

Over half of all adults surveyed globally (56%) agree they are in good health while one in six (17%) disagree and one in four (27%) neither agree nor disagree. Among the countries surveyed, those with the highest levels of reported good health are India (70%), Serbia (68%) and Saudi Arabia (67%) while those with the lowest levels are Hungary (47%), Poland (48%) and Russia (49%).

##### *Healthy Lifestyle*

Just about half of all adults globally agree they get enough sleep (49% vs. 25% who disagree) and eat a healthy diet (48% vs. 20%). Four in ten agree they get enough exercise (40% vs. 31% who disagree). Differences across countries are significant with Indians especially likely to say they get enough sleep, eat a healthy diet and get enough exercise while Japanese and South Koreans are especially unlikely to say so.

Globally, two thirds (68%) agree they are in frequent contact with family members and/or friends while 11% disagree. Social isolation is most prevalent in Japan (where 26% disagree), Poland (17%) and South Korea (16%).

Feelings of safety vary widely across countries. While 53% globally agree that they feel safe in their community, 20% disagree and 27% neither agree nor disagree. Agreement is highest in Canada (75%), the United States (71%) and China (69%). Countries showing the highest percentages of adults who do not feel safe are Peru (43%), Brazil and Mexico (40% each) and Turkey (38%).

##### *Adequate Medical and Dental Care*

Globally, one half (49%) agree they get all the medical care they need while one quarter (24%) disagree and another quarter (27%) neither agree nor disagree. Countries with the largest proportions of adults disagreeing they get all the care they need are Russia (44%), Peru (44%), Poland (42%) and Chile (40%) — contrasting with Germany (only 11%) as well as Belgium, Australia and Great Britain (12% all). Compared to medical care, a slightly lesser proportion globally (46%) agree they get all the dental care they need while 28% disagree. Countries where proportions of those disagreeing are the highest (chief among them Chile at 51%) and lowest (led by Germany at 10%) are largely the same.

##### *Provider Visits*

Globally nine in ten adults ever consult a primary care physician (89%, including 70% at least once a year) and a dentist (89%, including 63% at least once a year). Three in four ever visit an optometrist or ophthalmologist (75%, including 43% once a year) and three in four women ever visit an Ob/Gyn (74%, including 48% once a year). Fewer ever call upon the services of a physical or occupational

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therapist (46%), an alternative medicine professional (40%), a mental health professional (38%), or an audiologist (37%), or any other type of medical specialist or healthcare professional (65%).

Frequency of consultation varies greatly across countries. Proportions of adults who visit various types of healthcare professionals at least once a year ranges from:

- 89% in Belgium to 36% in Japan for primary care physicians
- 86% in Germany to 40% in Japan for dentists
- 79% in Germany to 14% in Great Britain for Ob-Gyns (among women only)
- 65% in Saudi Arabia to 18% in Japan for optometrists/ophthalmologists
- 58% in Hungary to 6% in Japan for physical or occupational therapists
- 50% in China to 11% in Japan for alternative medicine professionals
- 41% in Saudi Arabia 6% in Japan for audiologists
- 36% in Saudi Arabia to 12% in Japan for mental health professionals
- 60% in Saudi Arabia to 18% in Japan for other types of medical specialists

## *Prevalence of Long-Standing Conditions*

Globally one third (34%) say they have a long-standing condition, illness or health condition that limits them in some way. Russia is by far the country with the highest proportion of adults reporting a longstanding condition (57%), followed by Hungary (43%) and Sweden (42%). Italy has the lowest proportion (22%), followed closely by Japan (23%) and Mexico (23%).

## *Donating Organs and Blood*

Globally, six in ten adults surveyed agree they would allow their organs to be removed to help others in need in the case of sudden death. The only four countries where a majority does not agree with this statement are Saudi Arabia, South Korea, Japan, and Russia. Despite overwhelming support for organ donation, comparatively fewer respondents report frequently giving blood to help others — only 29%. The only countries where a majority report giving blood frequently are Saudi Arabia, Turkey, and India.

## *Public Health Concerns*

Globally, cancer ranks as the #1 public health concern with obesity a far second. Half of adults (52%) across 28 countries consider cancer to be among the three biggest health issues in their country, while one third (33%) do so for obesity and one in four for mental health (27%), stress (25%), and diabetes (23%). Cancer ranks as one of the top three concerns in every single country surveyed.

## **Evaluating the Healthcare System**

### *Quality and Trust in the Healthcare System*

Consumers' assessment of the quality of their healthcare varies widely across countries. Globally, 45% rate as good, 33% as neither good nor poor and 23% as poor the quality of the healthcare they have access to in their country. Majorities in 14 of 28 countries rate it as good, the largest ones being in Great Britain (73%), Malaysia (72%), and Australia (71%). Poor ratings outnumber good ratings in nine countries, including Brazil (by 39 points), Poland (31 points) and Russia (29 points).

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Overall only four in ten adults (41%) surveyed across 28 countries agree that they trust the healthcare system in their country to provide them with the best treatment while nearly three in ten (28%) and another three in ten (31%) neither agree nor disagree. Confidence in the local healthcare system is highest in Spain (where 64% agree they trust it), Great Britain (63%), Malaysia (63%), and Australia (61%). It is lowest in Hungary (13%), Russia (13%) and Brazil (20%).

## *Getting an Appointment*

Globally, 60% of those surveyed agree that waiting times to get an appointment with doctors are too long in my country — including a majority in every country except Belgium, South Korea, the U.S., Australia and Japan.

Concurrently, only 41% agree it is easy to get an appointment with a doctor in their area while 32% disagree. Countries where more than three in five agree include Spain, Australia and India. Those with a majority disagreeing include Brazil, Peru, Hungary, and Poland.

Relatedly, just over half (55%) agree the healthcare system in their country is overstretched. This opinion is most prevalent in Great Britain where 85% agree, Hungary (80%) and Sweden (74%). More disagree than agree in Japan, Poland and South Korea.

## *Equality of Access and Care*

Three in five (58%) agree many people in their country cannot afford good health care while 19% disagree and 23% neither agree nor disagree. All 13 of the 28 countries where at least 70% agree are emerging economies except for the U.S. where 75% agree. The only countries where more disagree than agree are Sweden, Canada, Great Britain, and South Korea.

Concurrently, only 32% agree that the healthcare system in their country provides the same standard of care to everyone vs. 40% who disagree; 28% who neither agree nor disagree. Only four countries show a majority agreeing: Malaysia, Great Britain, Spain and Canada. Fewer than 20% agree in Hungary, Poland, South Africa, and all four South American countries surveyed.

## *Concerns about Data Security*

Half (50%) agree they are concerned that their personal data will be made available to third parties without their consent. Concern is most prevalent in Mexico and Peru where 67% and 65%, respectively, agree. In contrast, respondents in Sweden (31%) are less likely to worry about their personal data as are those in all G7 countries with the notable exception of the U.S. (54%).

## *Key Problems with Countries' Healthcare Systems*

Among problems facing healthcare systems, access to treatment/long waiting times is the one consumers around the world are most likely to view as a major concern (selected by 40%), followed by insufficient staffing (36%), cost of accessing treatment (32%), and bureaucracy (26%).

Access to treatment/wait times for doctor appointments are cited as a major problem by a majority of respondents in eight countries, most of all in Poland (70%), Serbia (68%), Hungary (65%) and Chile (64%). Lack of staff is cited by at least half of respondents in six countries, including Sweden (68%), France (67%), Hungary (63%) and Germany (61%).

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Issues that are of much greater concern in certain countries include:

- Cost of accessing treatment (64% in the U.S. and 56% in Russia)
- Poor quality of treatment (59% in Russia)
- Aging population (52% in Japan and 46% in China)
- Lack of investment (over 40% in Argentina, Brazil, Great Britain and Spain)
- Bureaucracy (46% in Mexico)
- Low standards of cleanliness (30% in India and South Africa)

## Patient Experience

While in many countries, consumers tend to have mixed views about their healthcare system, their opinions about interactions with individual healthcare professionals are generally positive.

Majorities of adults surveyed across 28 countries agree that, the last time they saw a healthcare professional, they were treated with dignity and respect (60%), they were taken seriously (56%), they were shown respect for their values, preferences or expressed needs (55%), they were accepted for who they were (55%), their safety was a priority (52%), and they knew what to expect from their doctor (52%).

However, the study findings suggest that many patients do not have a close relationship with their providers. Globally, less than half of all respondents agree that the provider they last saw know them as a person (36%), or that they know that doctor very well (37%), or that the doctor showed them emotional support (40%).

Looking at 16 healthcare experience attributes, the countries surveyed showing the highest average ratings are India, the U.S., Malaysia, Australia and Canada. Those with the lowest ones are Japan, Russia, South Korea, Peru and Brazil.

## Expected Changes in Healthcare

Views about the future of healthcare differ widely across countries as optimism prevails in emerging countries (especially China, India, Saudi Arabia, Malaysia and throughout Latin America) while pessimism dominates in many developed countries (especially in Western Europe).

Globally, more people think that the availability of treatments for various health conditions will get better (47%) than will get worse (18%), but the reverse is true in Germany, Italy, France, and Sweden.

Globally, optimists also outnumber pessimists on both the quality of one's healthcare and the availability of providers (by 18 and 15 percentage points, respectively), but pessimists lead in most European countries.

When it comes to the cost of one's healthcare, more consumers across all countries surveyed expect it will be worse in ten years (34%) than expect it will be better (30%). On the issue of cost, pessimism prevails by significant margins in otherwise optimistic countries when it comes to the future of healthcare, including the U.S., Australia, South Africa, and Turkey.

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## Adoption of Healthcare Technology

### *Telemedicine*

Globally, only 10% report having ever used telemedicine. Generally speaking, reported experience is far less common in Europe (2% in Belgium, 3% in Serbia, 4% in Russia, France, Spain and Hungary) than it is in emerging countries of Asia and the Middle East (31% in Saudi Arabia, 27% in India, 24% in China, 15% in Malaysia) and in the United States (15%). Among the 10% who have used it, about two thirds say they would use it again and one third say they wouldn't. Globally, 44% say they haven't used it but would try it.

### *Connected Health Devices*

Globally, 12% say they currently use a connected health device or tool to manage their health, 15% say they have used one, but are not using any now, and 68% say they have never used one — the other 6% do not know.

The five countries where usage is highest are the same as with telemedicine: China (28%), India (23%), Saudi Arabia (22%), Malaysia (18%) and the U.S. (15%). Those where usage of connected health devices is lowest are Japan (4%), Colombia (5%), and Argentina, Serbia, and Chile (6%).

The top motivations cited by users of a connected health device are monitoring or improving their exercise level (32%), being interested in their own health data (26%), and general wellbeing (24%). The main barriers to usage are cost (cited by 28% of non-users) and lack of familiarity (26%).

Globally, respondents overwhelmingly agreed that they would use a connected health device or tool to manage their health if recommended by their doctor (70%). About half say they would if recommended by a nurse (54%), a health insurer (50%), a pharmacist (49%), or a family member (46%).

## Healthcare Information

Doctors and other healthcare professionals are the primary go-to source of information about healthcare, symptoms of diseases and treatments: it is the only one which is used by a majority of all adults globally (58%). It is the #1 source in every single country except Japan and Saudi Arabia.

The other sources most commonly used are online search engines (43%), family and friends (37%), pharmacists (34%), online encyclopedias (22%) and online medical information tools (22%).

Views on the availability of information about healthcare services and on how to take care of one's health vary widely across countries.

Globally 47% agree that information about healthcare services is readily available when they need it and 50% say so of information about how to look after one's health, Agreement is generally high in all dominantly English-speaking countries as well as Malaysia, Turkey, Sweden, Germany, Spain and South Korea. It is lowest across South America, Central Europe, Italy and Japan.

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## About the Study

The findings come from surveys conducted in 2018 on the Ipsos Global Advisor platform using the Ipsos Online Panel system. One of the surveys (questions A1-A5) was conducted between April 20 and May 4, 2018 with 20,767 adults across 27 countries: Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States.

The other survey (comprising questions B1-B13) was conducted between May 25 and June 8, 2018 with 23,249 adults across 28 countries (the same as above plus Colombia).

All survey respondents are aged 18-64 in Canada and the U.S. and 16-64 in all other countries.

Data is weighted to match the profile of the population.

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## About Ipsos

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