

Global Views On Healthcare – 2018

What does the world think about healthcare?

IPSOS GLOBAL ADVISOR

GAME CHANGERS



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- The findings come from surveys conducted in 2018 on the Ipsos Global Advisor platform using the Ipsos Online Panel system.
- The survey comprising 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 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 .
- The sample size per country in each survey is approximately N=1,000 for Australia, Brazil, Canada, China, France, Italy, Japan, Malaysia, Spain, Germany, Great Britain, and the U.S., and approximately N=500 for Argentina, Belgium, Colombia, Chile, Hungary, India, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Sweden, and Turkey.
- Weighting has been employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country census data.
- A survey with an unweighted probability sample of this size would have an estimated margin of error of +/- 3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points for a 500 sample 19 times out of 20.
- In 17 of the countries surveyed ,internet penetration is sufficiently high to think of the samples as representative of the national population within the age ranges covered: Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, Serbia, South Korea, Spain, Sweden, Great Britain, and U.S. Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Russia, Peru, Saudi Arabia, South Africa, and Turkey have lower levels of internet penetration. Samples from those countries should not be considered to be fully nationally representative, but instead to represent a more affluent, connected population, representing an important and emerging middle class.
- Results may not always sum to 100% or may be 1 point higher/lower than the actuals due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

Personal Health Perceptions

Do citizens feel like they are living a healthy lifestyle?

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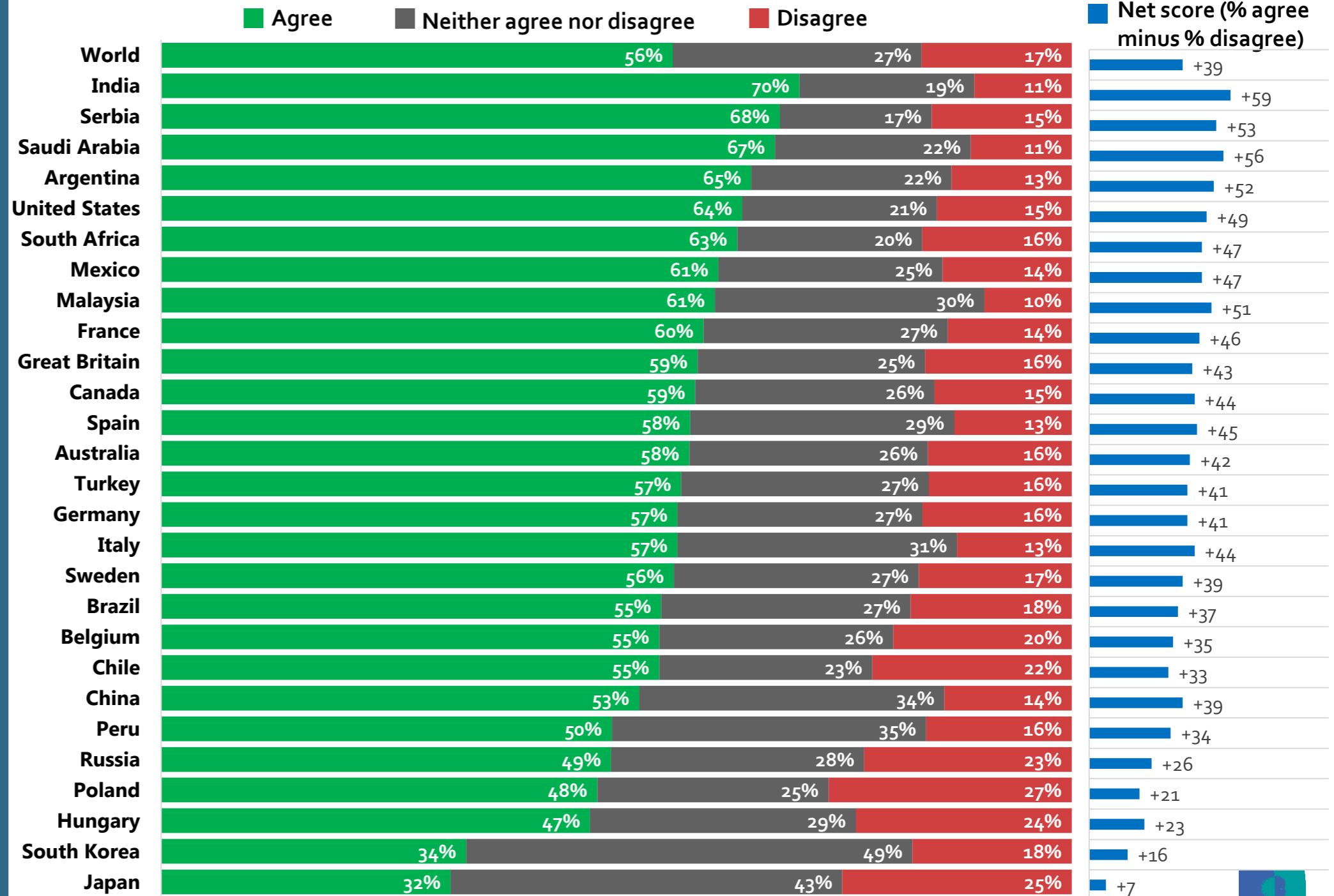
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Personal Health Perceptions – Good Health

QA1. Please indicate your level of agreement with each of the following statements. – *I am in good health.*

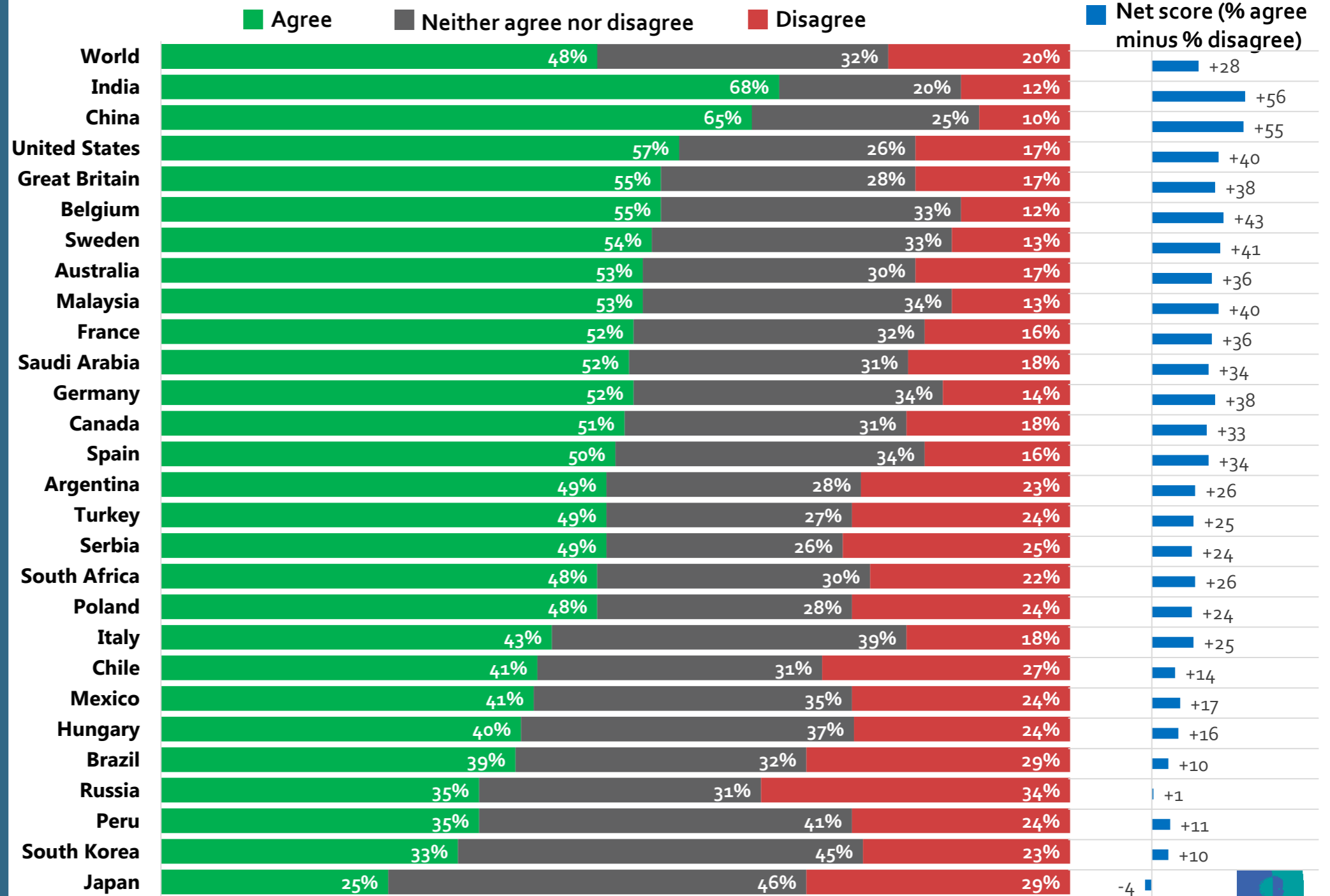


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Personal Health Perceptions – Healthy Diet

QA1. Please indicate your level of agreement with each of the following statements. – *I eat a healthy diet.*

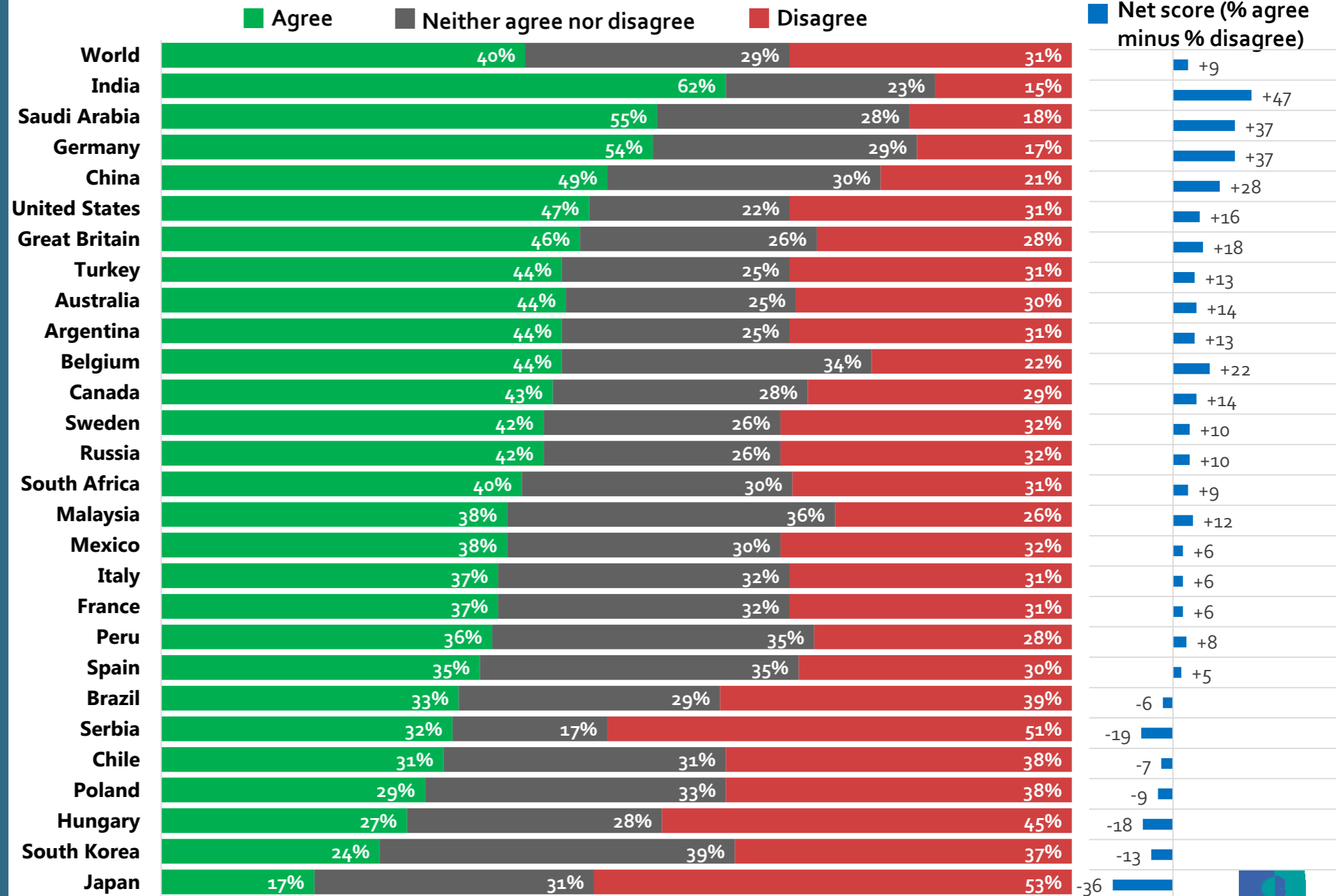


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Personal Health Perceptions – Exercise

QA1. Please indicate your level of agreement with each of the following statements. – *I get enough exercise.*

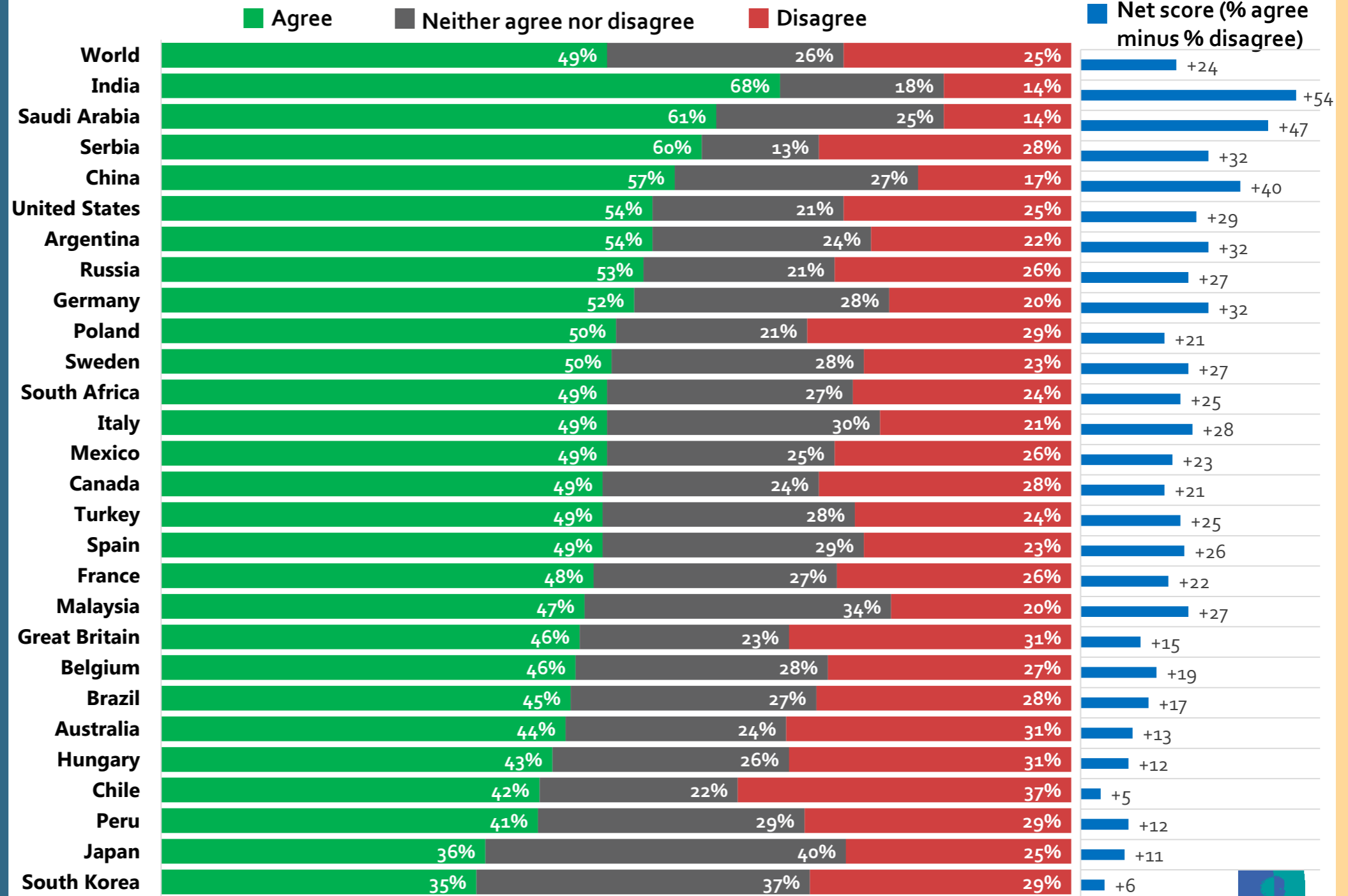


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Personal Health Perceptions – Sleep

QA1. Please indicate your level of agreement with each of the following statements. – *I get enough sleep.*

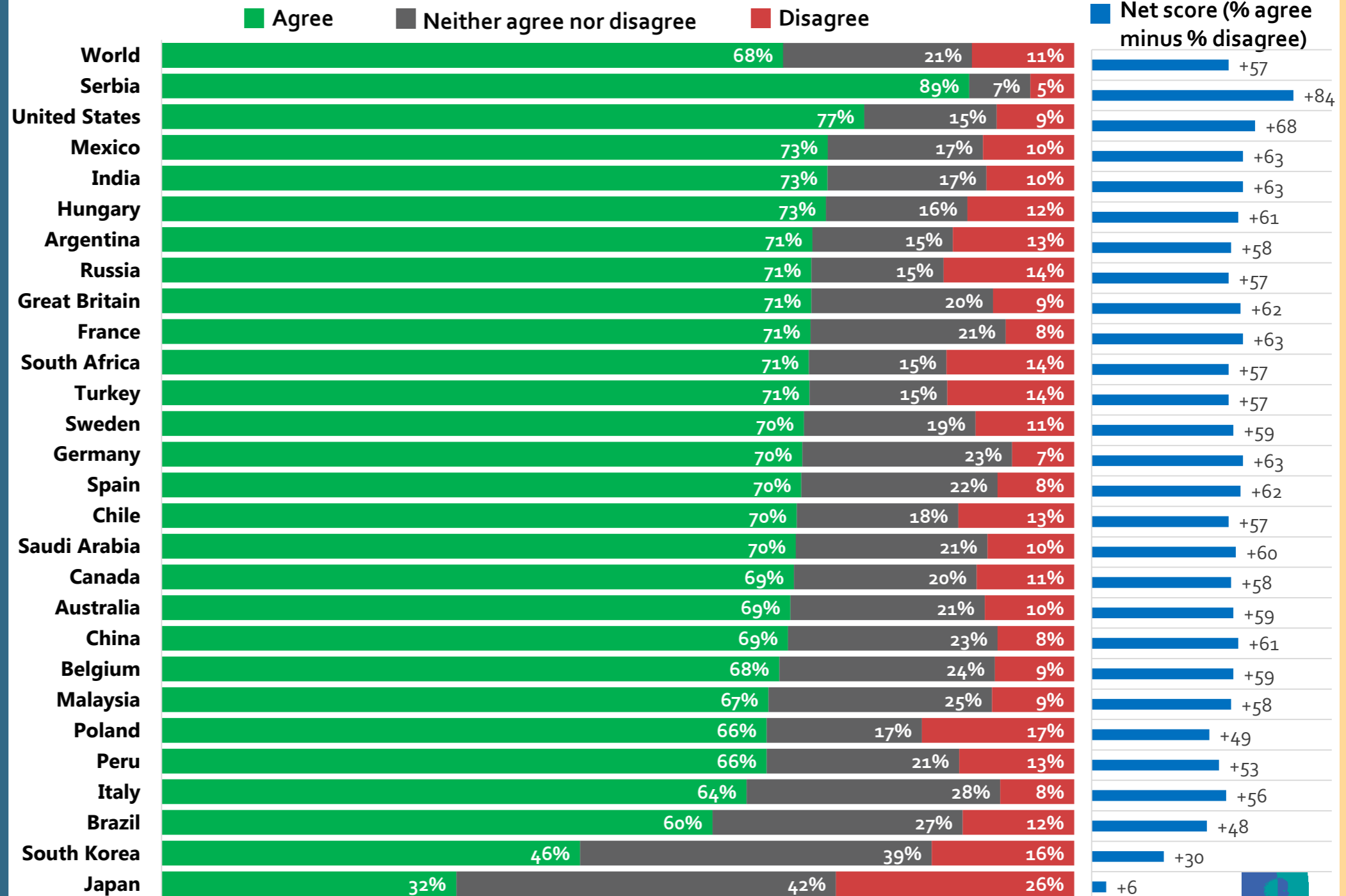


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Personal Health Perceptions – Social Engagement

QA1. Please indicate your level of agreement with each of the following statements. – *I am in frequent contact with family members and/or friends.*

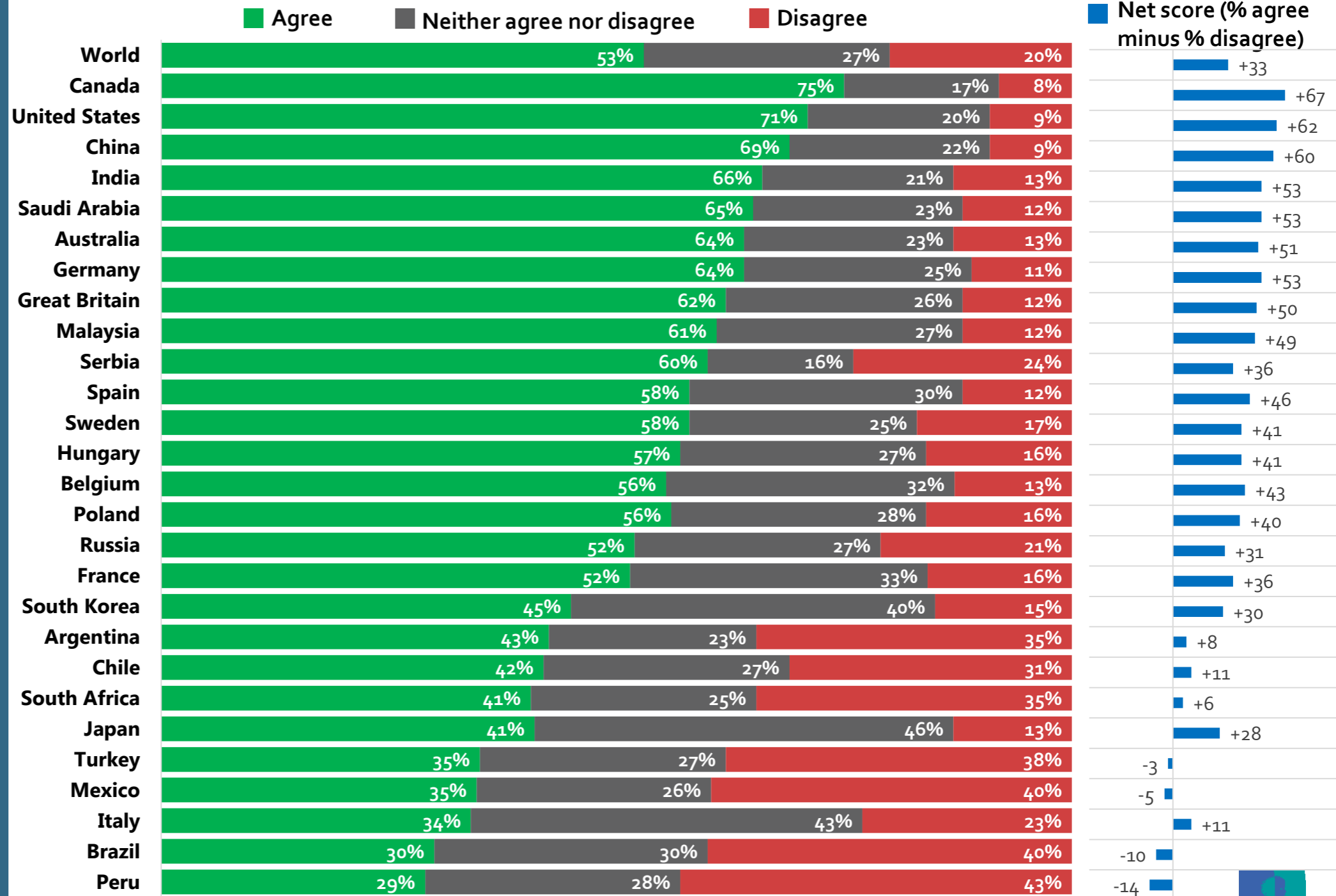


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Personal Health Perceptions – Safety

QA1. Please indicate your level of agreement with each of the following statements. – *I feel safe in my community.*

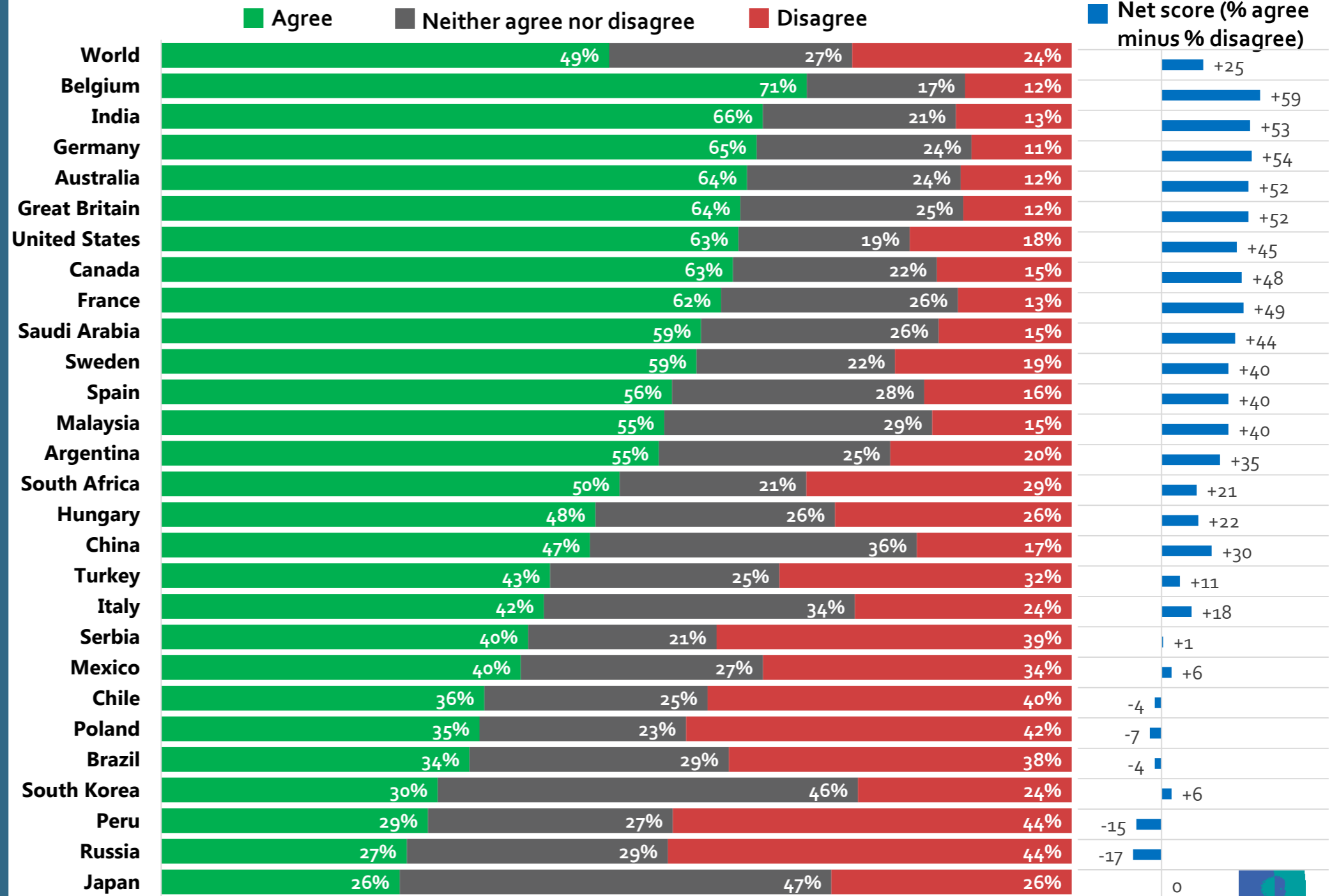


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Personal Health Perceptions – Medical Care

QA1. Please indicate your level of agreement with each of the following statements. – *I get all the medical care I need.*

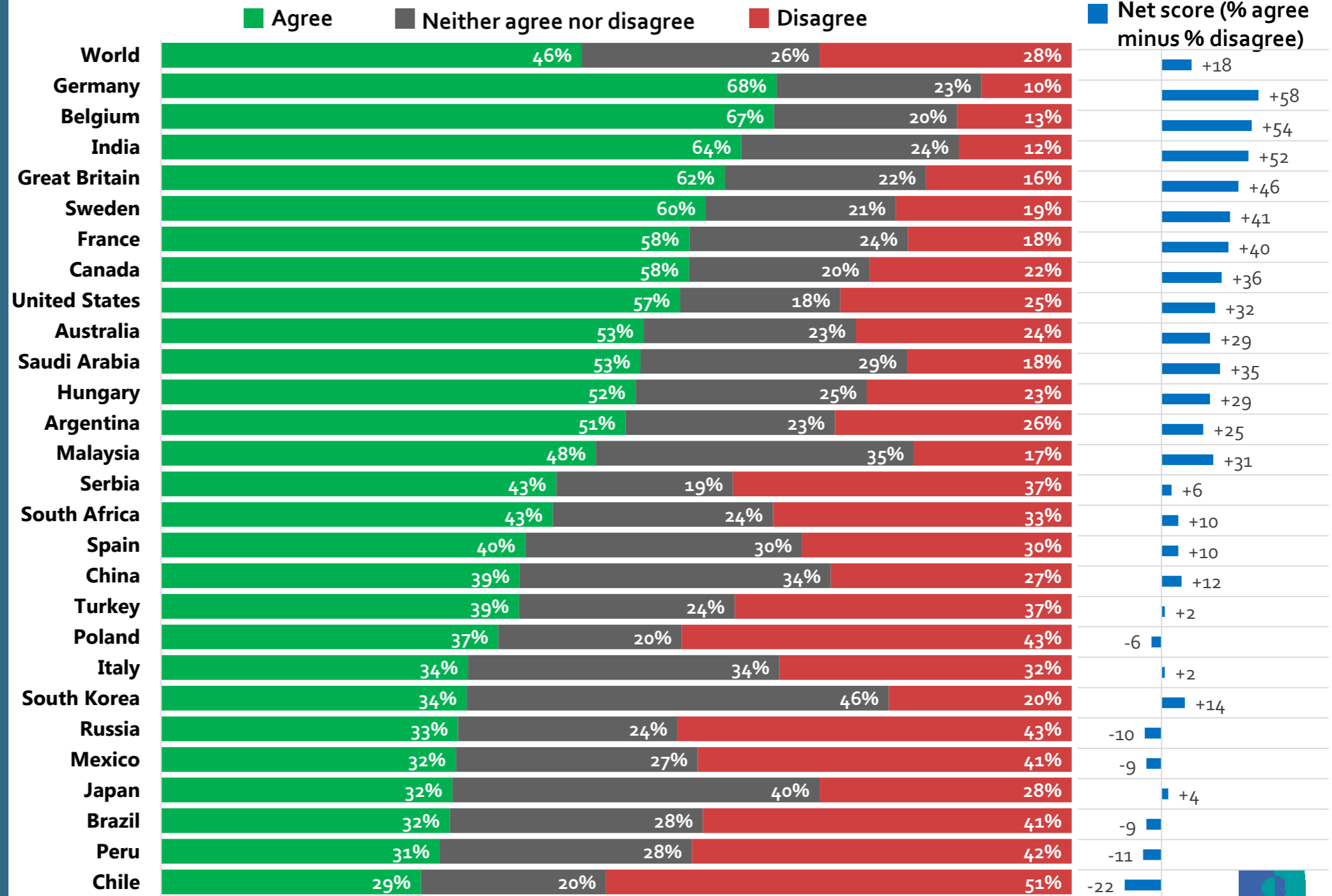


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Personal Health Perceptions – Dental Care

QA1. Please indicate your level of agreement with each of the following statements. – *I get all the dental care I need.*



Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



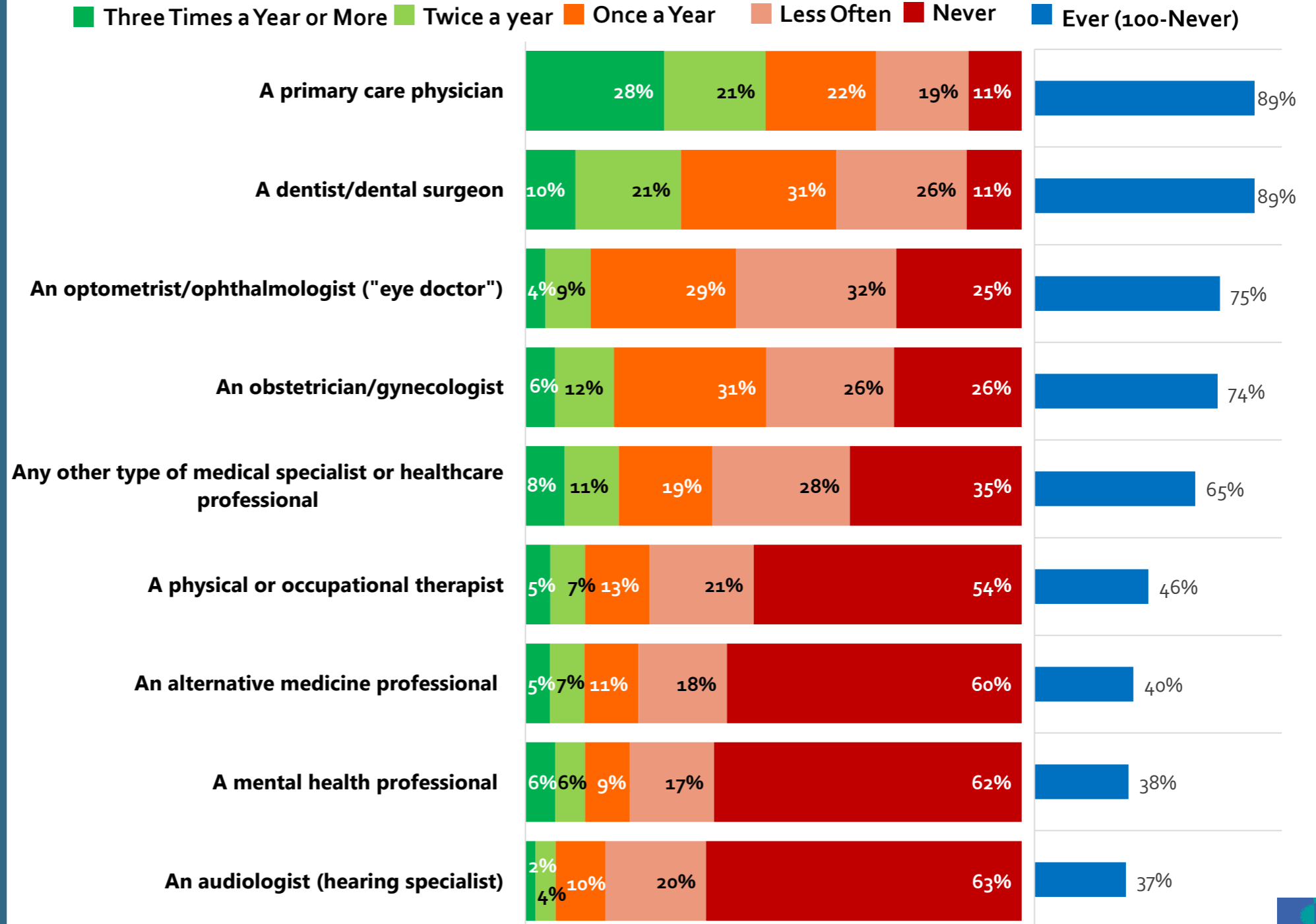
Personal Health Perceptions - Summary

Please indicate your level of agreement with each of the following statements. (% agree)

	W	A	A	B	B	C	C	C	F	G	D	H	I	I	J	K	M	M	P	P	R	S	S	Z	E	S	T	U
	O	R	R	E	R	A	H	H	R	B	E	U	N	T	P	O	Y	E	E	O	U	A	R	A	S	W	U	S
	L	G	S	L	A	N	L	N	A	R	U	N	D	A	N	R	S	X	R	L	S	U	B	F	P	E	R	A
	D																											
I am in frequent contact with family members and/or friends	68%	71%	69%	68%	60%	69%	70%	69%	71%	71%	70%	73%	73%	64%	32%	46%	67%	73%	66%	66%	71%	70%	89%	71%	70%	70%	71%	77%
I am in good health	56%	65%	58%	55%	55%	59%	55%	53%	60%	59%	57%	47%	70%	57%	32%	34%	61%	61%	50%	48%	49%	67%	68%	63%	58%	56%	57%	64%
I feel safe in my community	53%	43%	64%	56%	30%	75%	42%	69%	52%	62%	64%	57%	66%	34%	41%	45%	61%	35%	29%	56%	52%	65%	60%	41%	58%	58%	35%	71%
I get all the medical care I need	49%	55%	64%	71%	34%	63%	36%	47%	62%	64%	65%	48%	66%	42%	26%	30%	55%	40%	29%	35%	27%	59%	40%	50%	56%	59%	43%	63%
I get enough sleep	49%	54%	44%	46%	45%	49%	42%	57%	48%	46%	52%	43%	68%	49%	36%	35%	47%	49%	41%	50%	53%	61%	60%	49%	49%	50%	49%	54%
I eat a healthy diet	48%	49%	53%	55%	39%	51%	41%	65%	52%	55%	52%	40%	68%	43%	25%	33%	53%	41%	35%	48%	35%	52%	49%	48%	50%	54%	49%	57%
I get all the dental care I need	46%	51%	53%	67%	32%	58%	29%	39%	58%	62%	68%	52%	64%	34%	32%	34%	48%	32%	31%	37%	33%	53%	43%	43%	40%	60%	39%	57%
I get enough exercise	40%	44%	44%	44%	33%	43%	31%	49%	37%	46%	54%	27%	62%	37%	17%	24%	38%	38%	36%	29%	42%	55%	32%	40%	35%	42%	44%	47%

Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018

Provider Visits – Global Summary

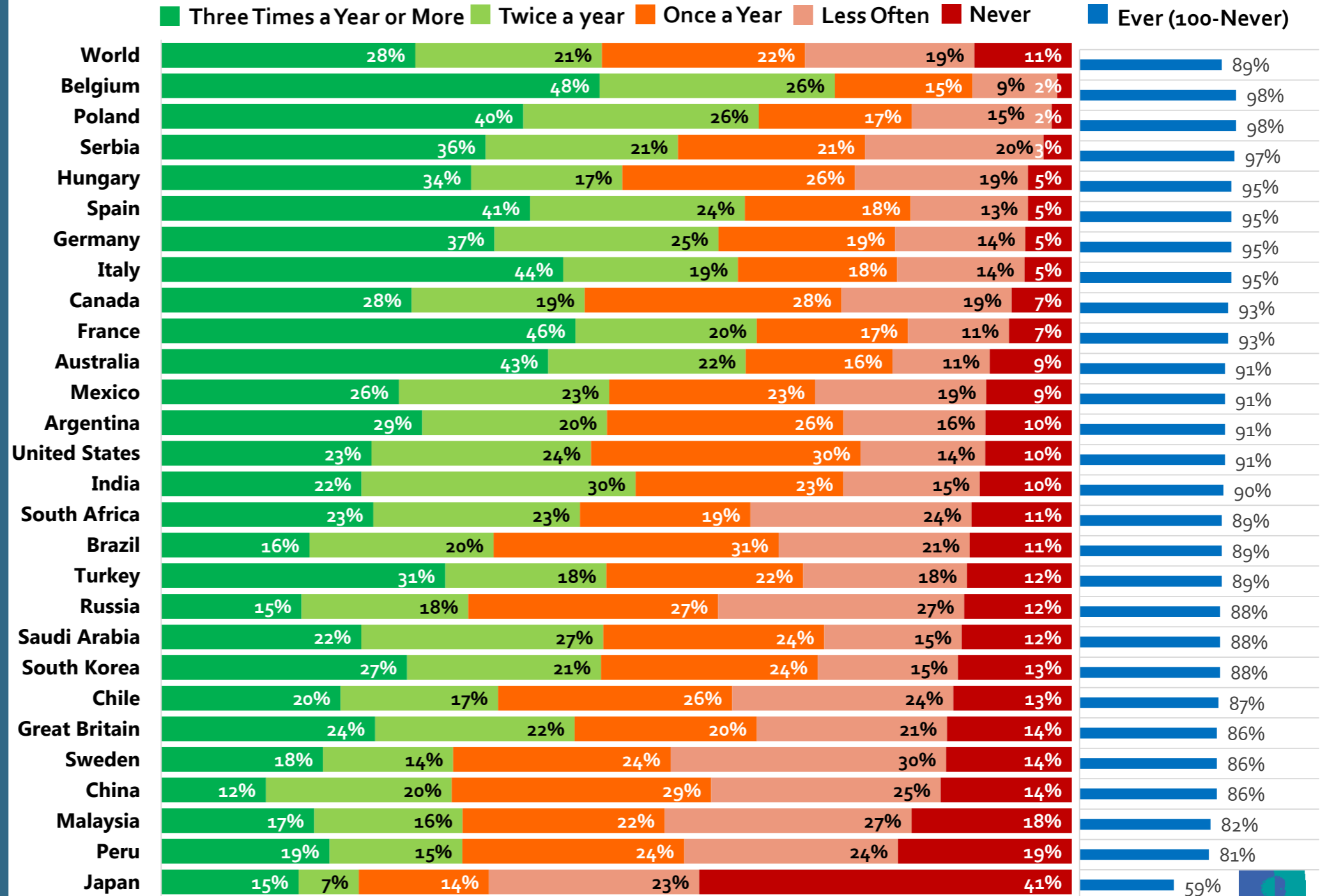


QA3. In general, how often do you visit/consult with each of the following for yourself? – World Total

Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018

Provider Visits – Primary Care Physician

QA3. In general, how often do you visit/consult with each of the following for yourself? – A primary care physician (general practitioner, internist, family doctor, etc.).

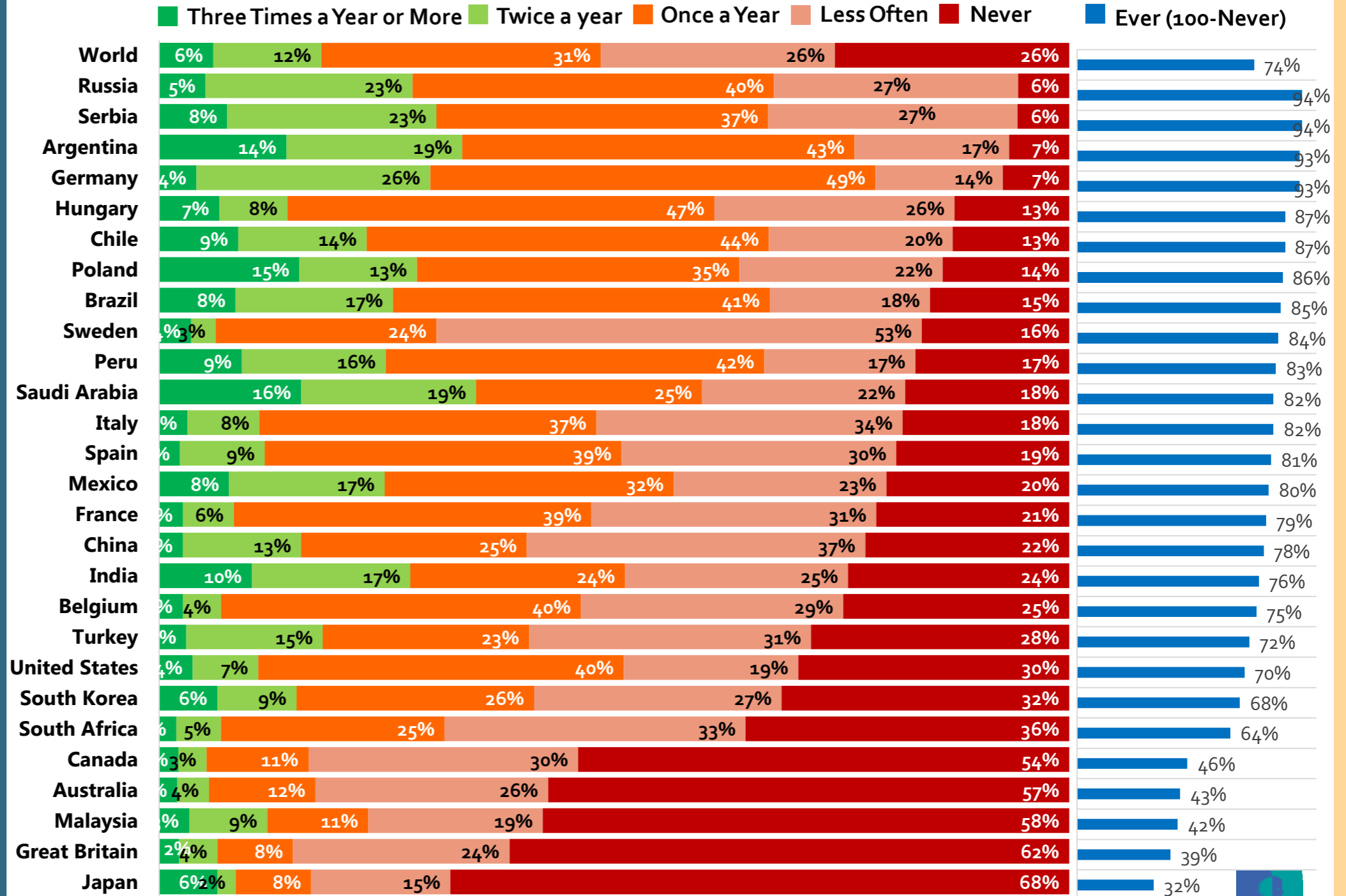


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Provider Visits – Obstetrician/Gynecologist (among women)

QA3. In general, how often do you visit/consult with each of the following for yourself? – An obstetrician/gynecologist.

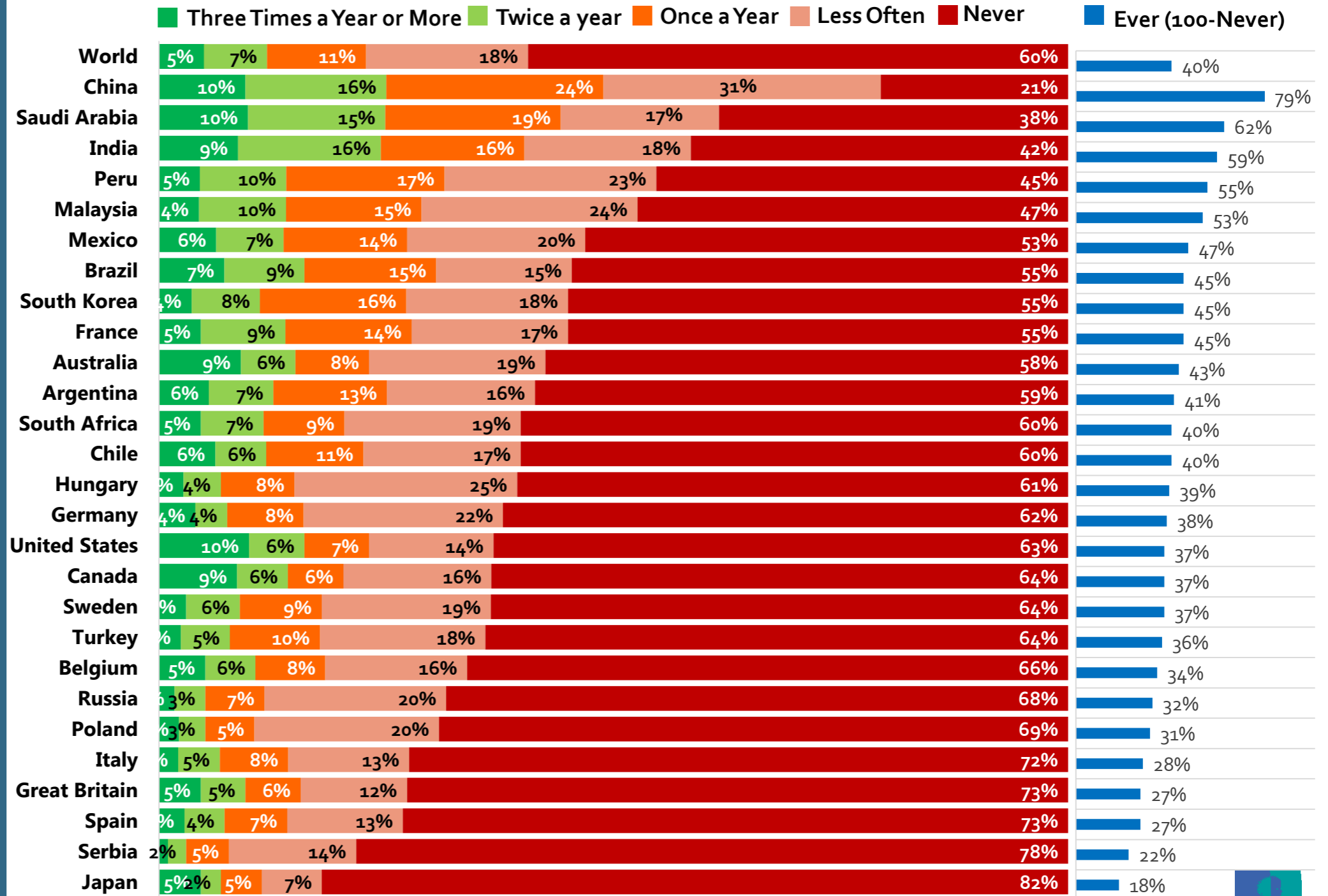


Base: 10,254 online adult females aged 16-64 across 27 countries April 20 – May 4, 2018



Provider Visits – Alternative Medicine Professional

QA3. In general, how often do you visit/consult with each of the following for yourself? – An alternative medicine professional (e.g., acupuncturist, osteopath, chiropractor, traditional Chinese medicine).

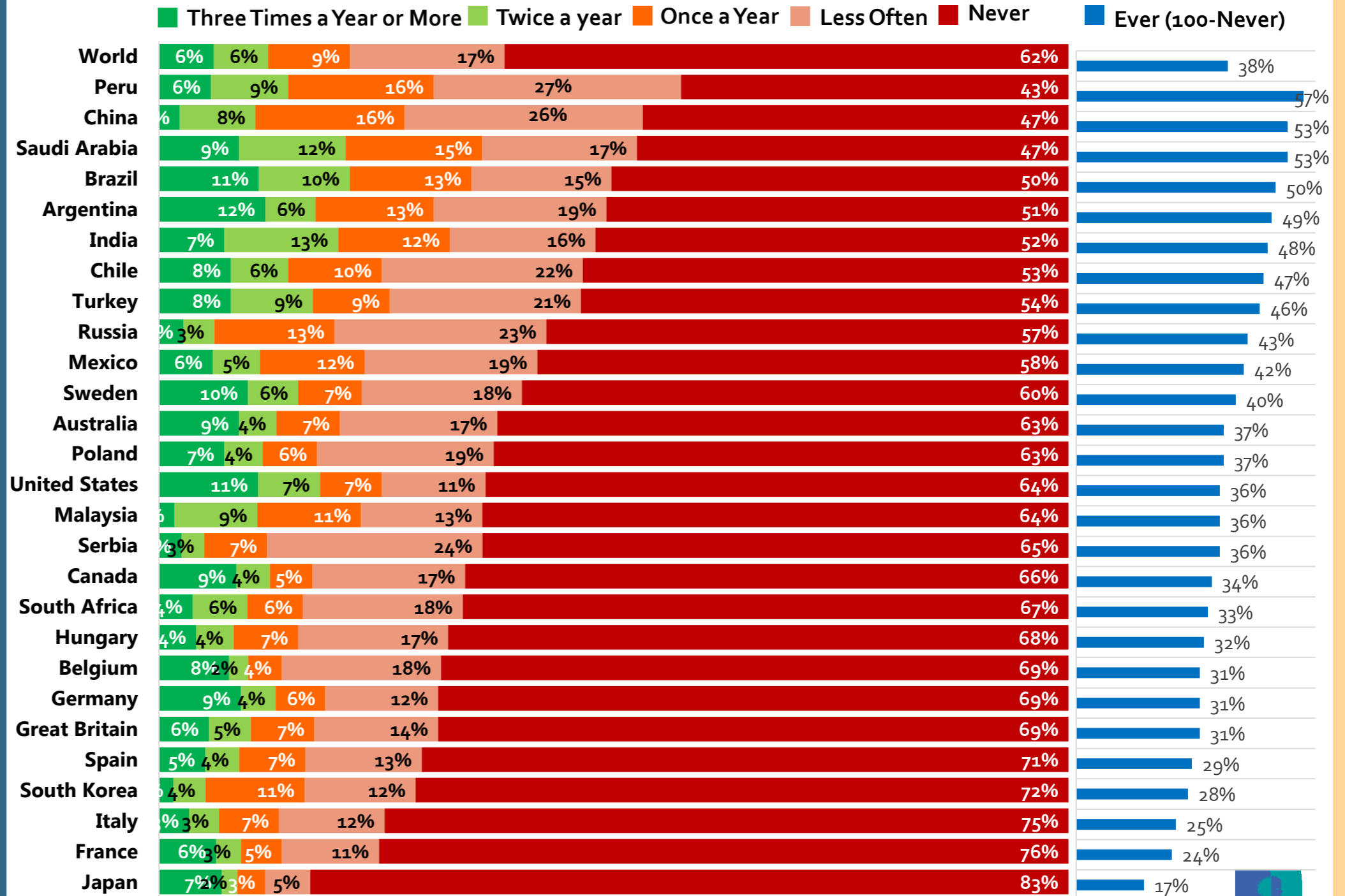


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Provider Visits – Mental Health Professional

QA3. In general, how often do you visit/consult with each of the following for yourself? – A mental health professional (e.g., psychiatrist, psychologist)

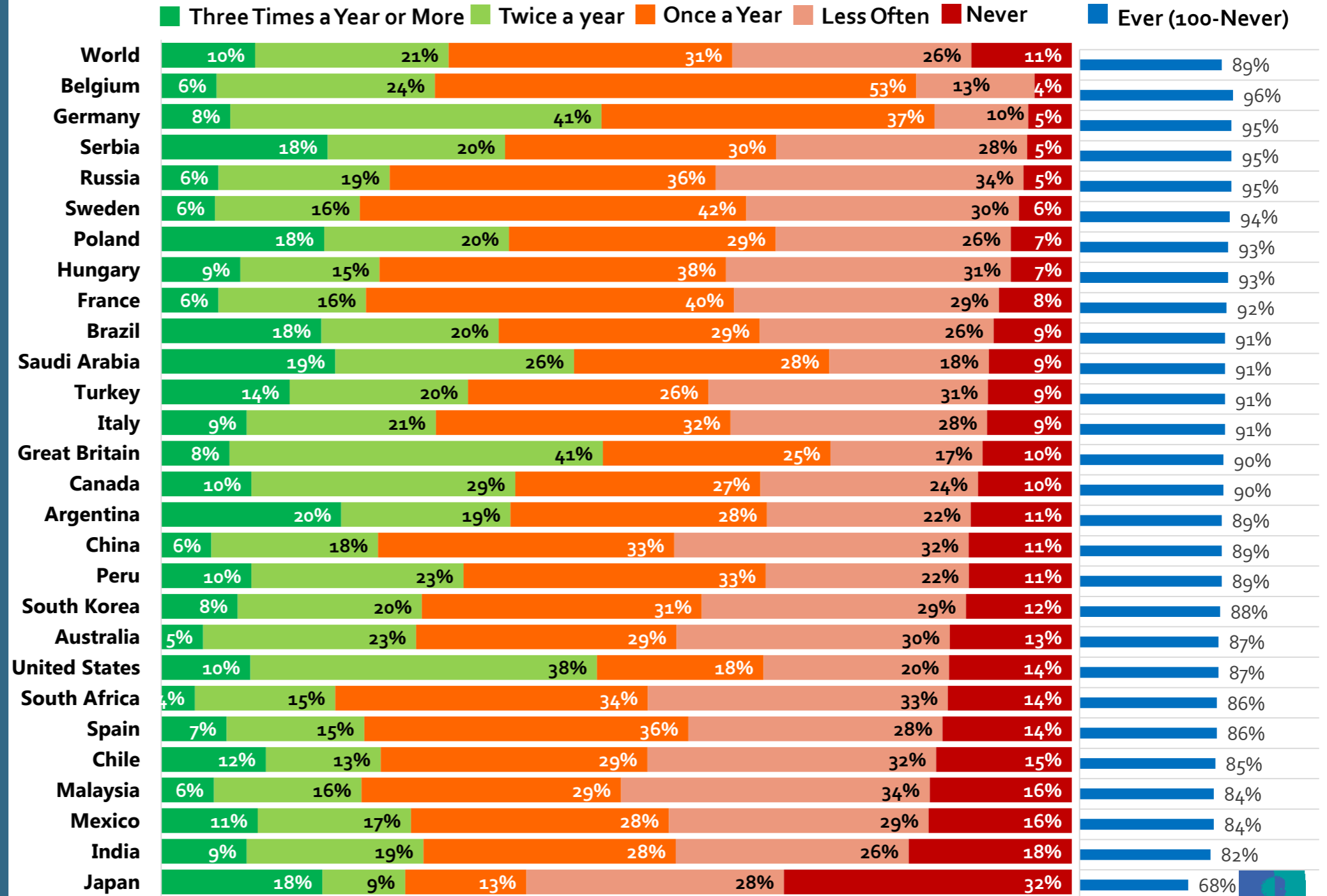


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Provider Visits – Dentist/ Dental Surgeon

QA3. In general, how often do you visit/consult with each of the following for yourself? – A dentist/dental surgeon.

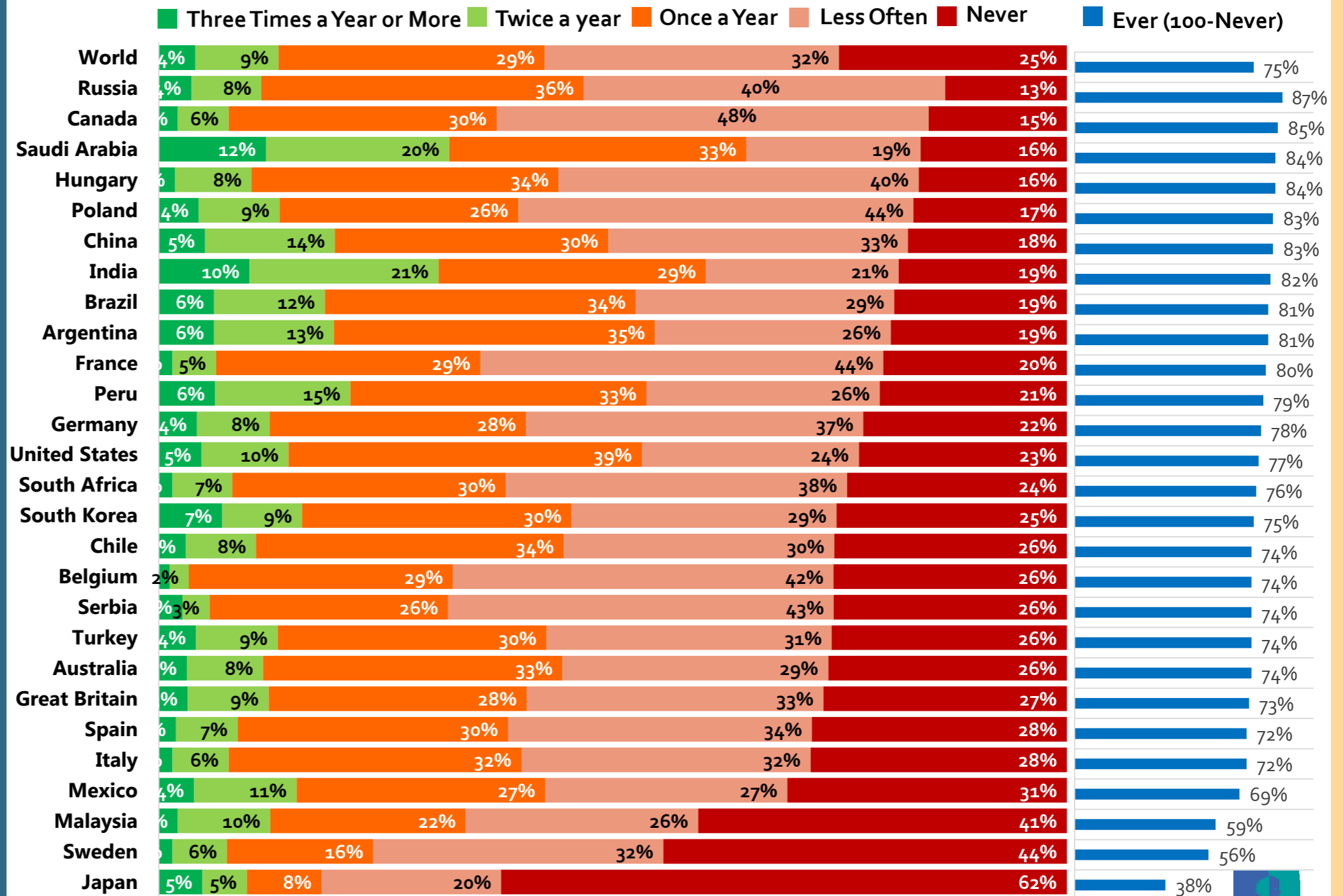


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Provider Visits – Optometrist/ Ophthalmologist

QA3. In general, how often do you visit/consult with each of the following for yourself? – An optometrist/ophthalmologist (“eye doctor”)

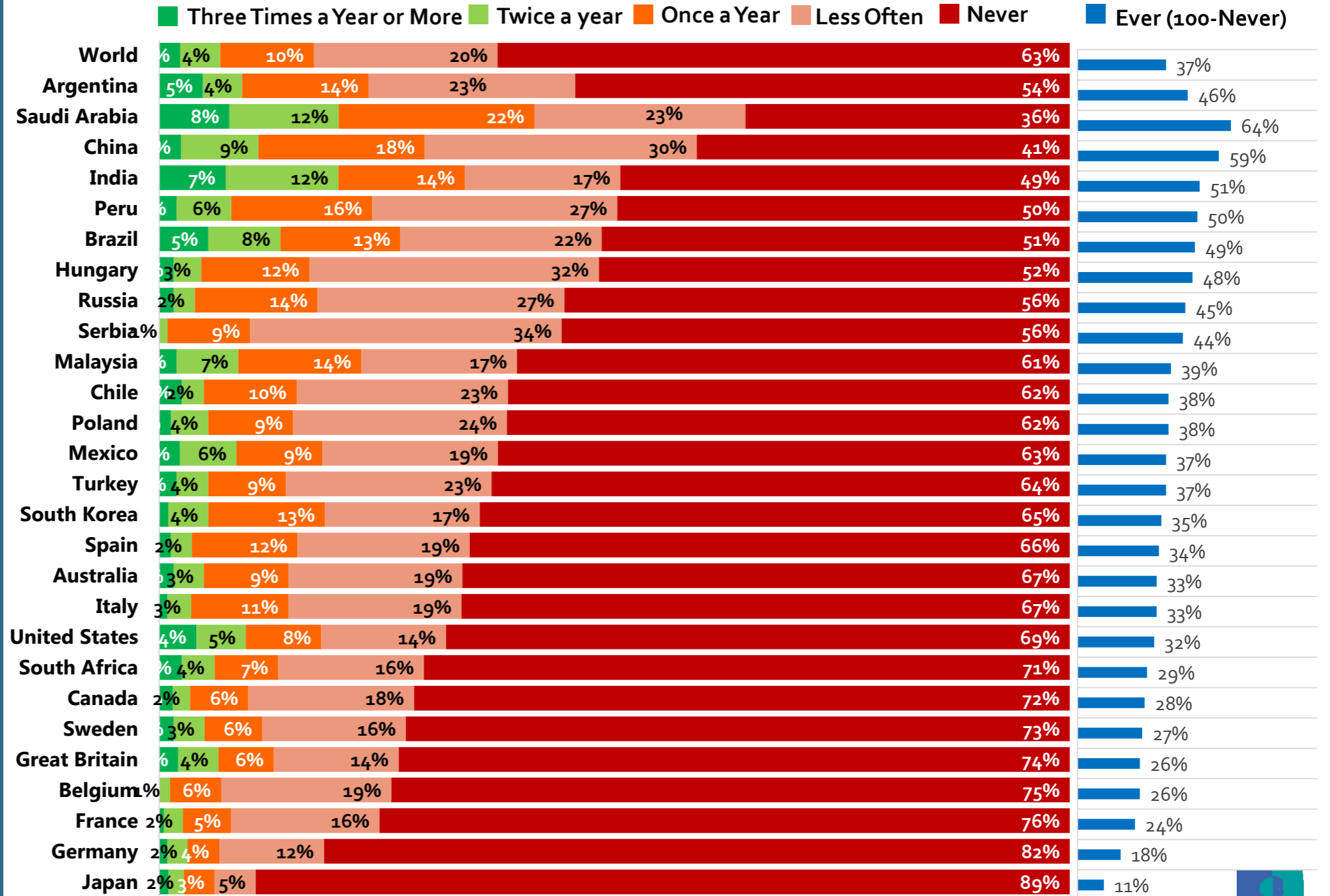


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Provider Visits – Audiologist/ Hearing Specialist

QA3. In general, how often do you visit/consult with each of the following for yourself? – An audiologist (hearing specialist)

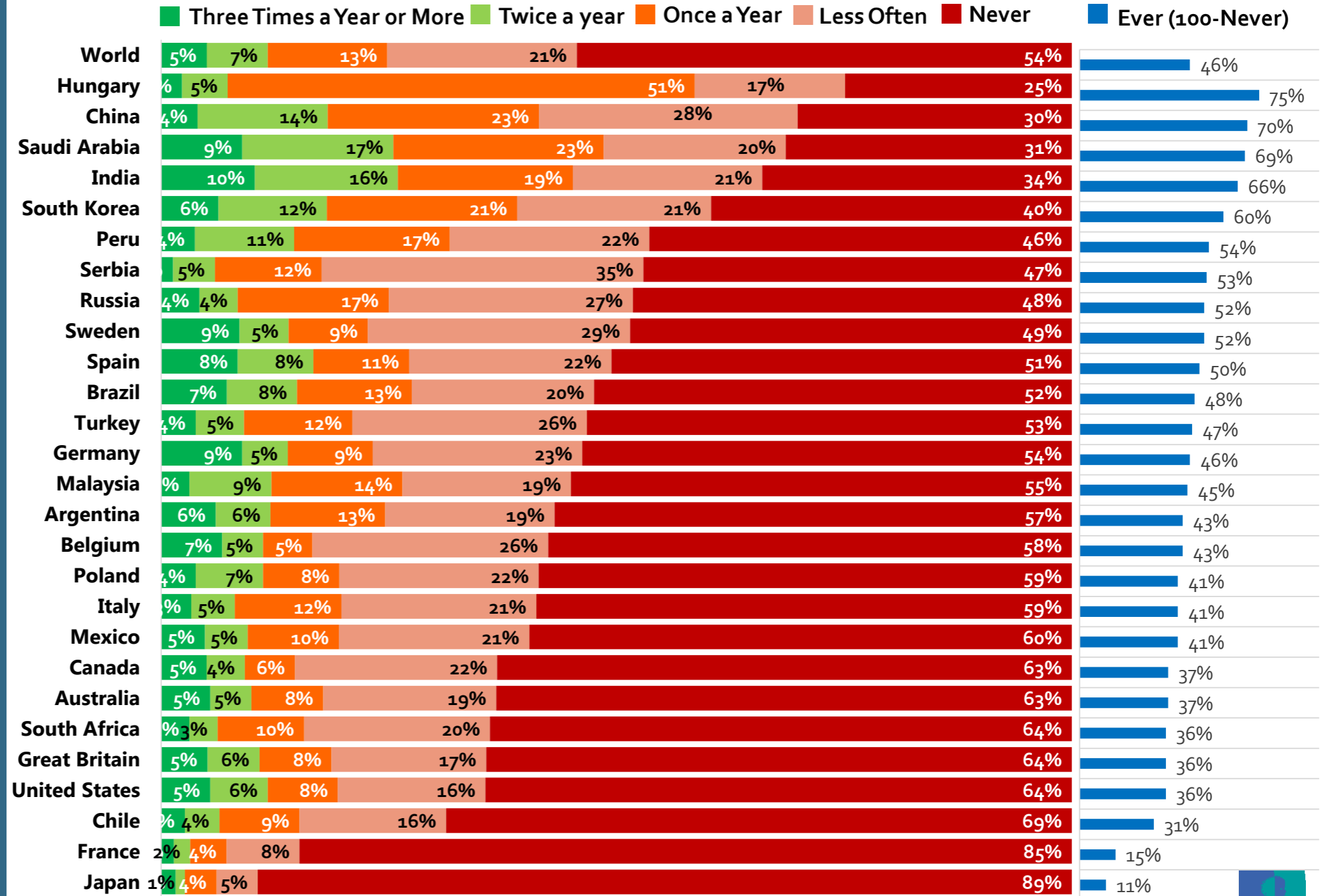


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Provider Visits – Physical/Occupational Therapist

QA3. In general, how often do you visit/consult with each of the following for yourself? – A physical or occupational therapist

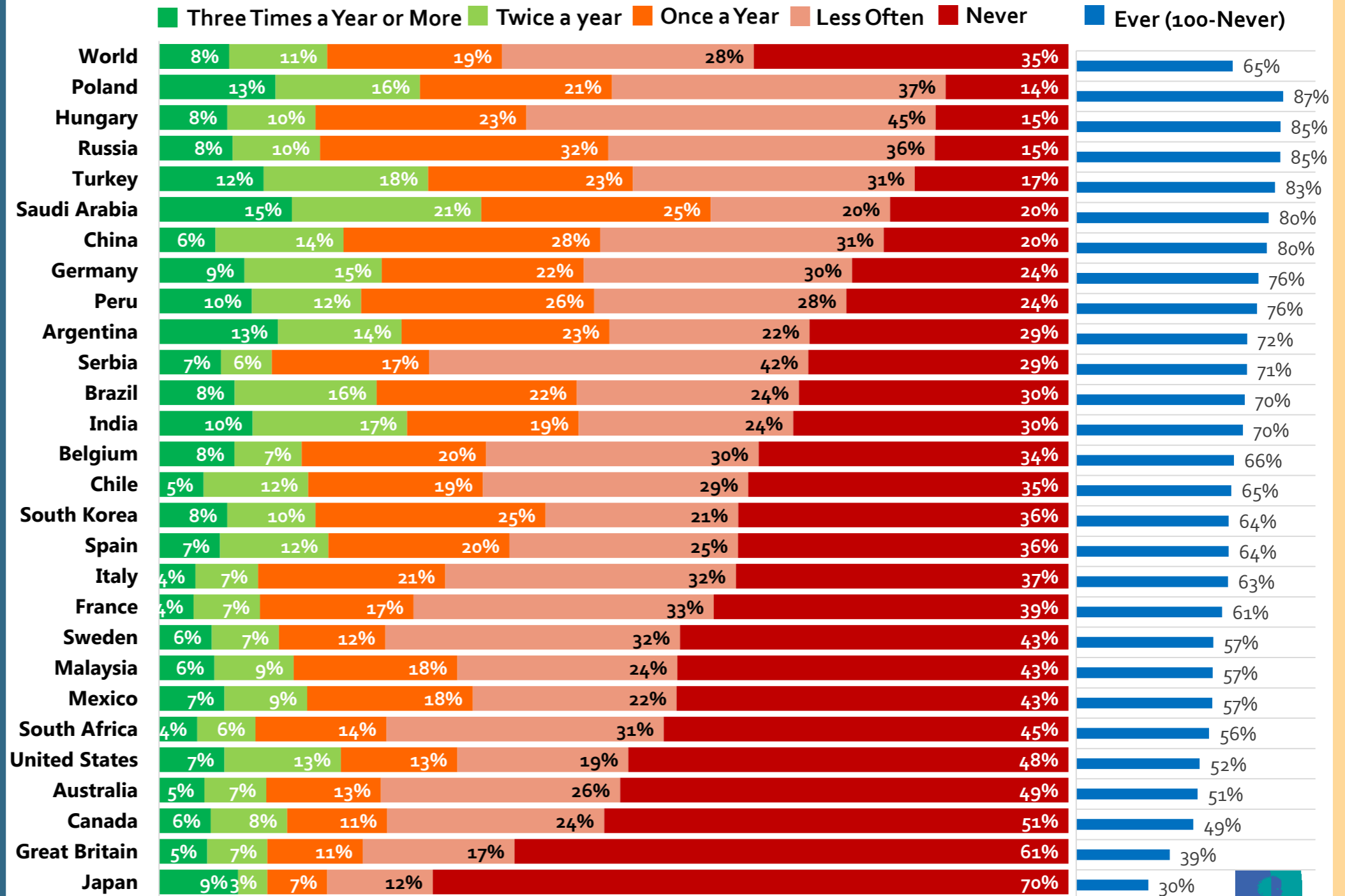


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



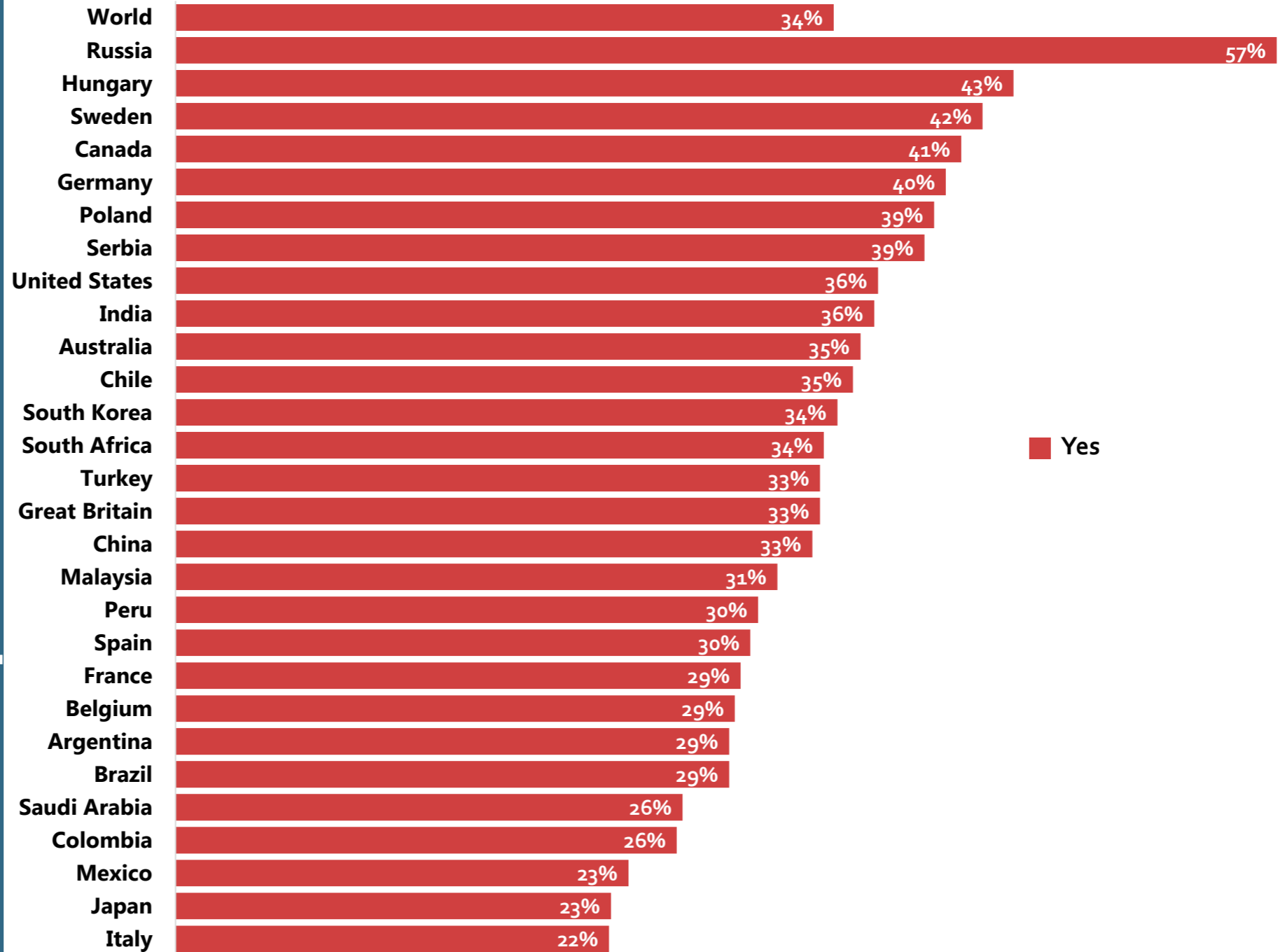
Provider Visits – Other Type of Specialist

QA3. In general, how often do you visit/consult with each of the following for yourself? – Any other type of medical specialist (e.g., dermatologist, neurologist, oncologist, etc.) or healthcare professional



Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018

Prevalence of Long-Standing Conditions

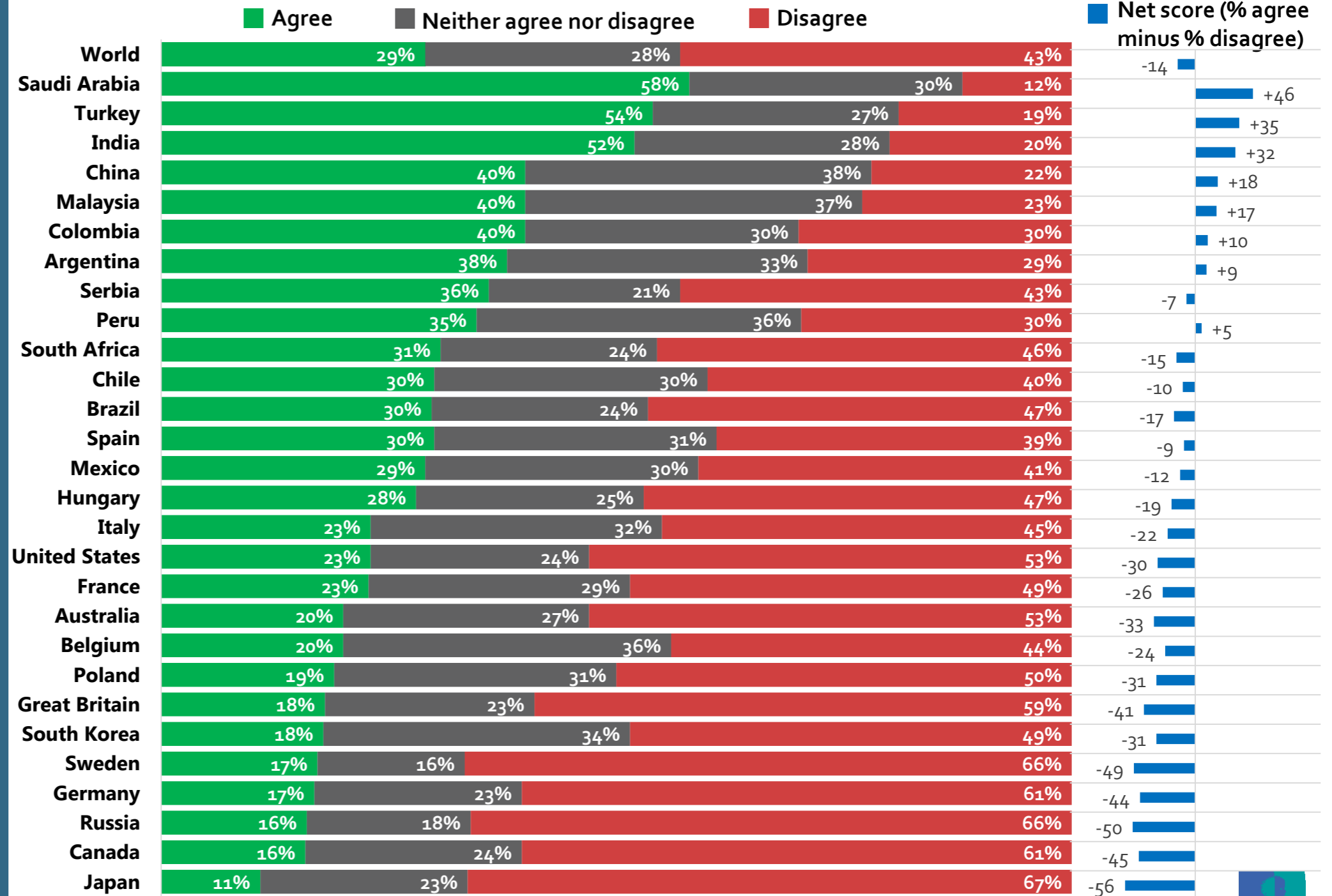


QB13. Do you have a long-standing condition, illness or health condition that limits you in some way? By long-standing, we mean anything that has troubled you over a period of time or that is likely to affect you over a period of time.

Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018

Frequency of Blood Donation

QB6. Now, thinking personally, to what extent do you agree or disagree with the following statement? – *I frequently give blood to help others.*

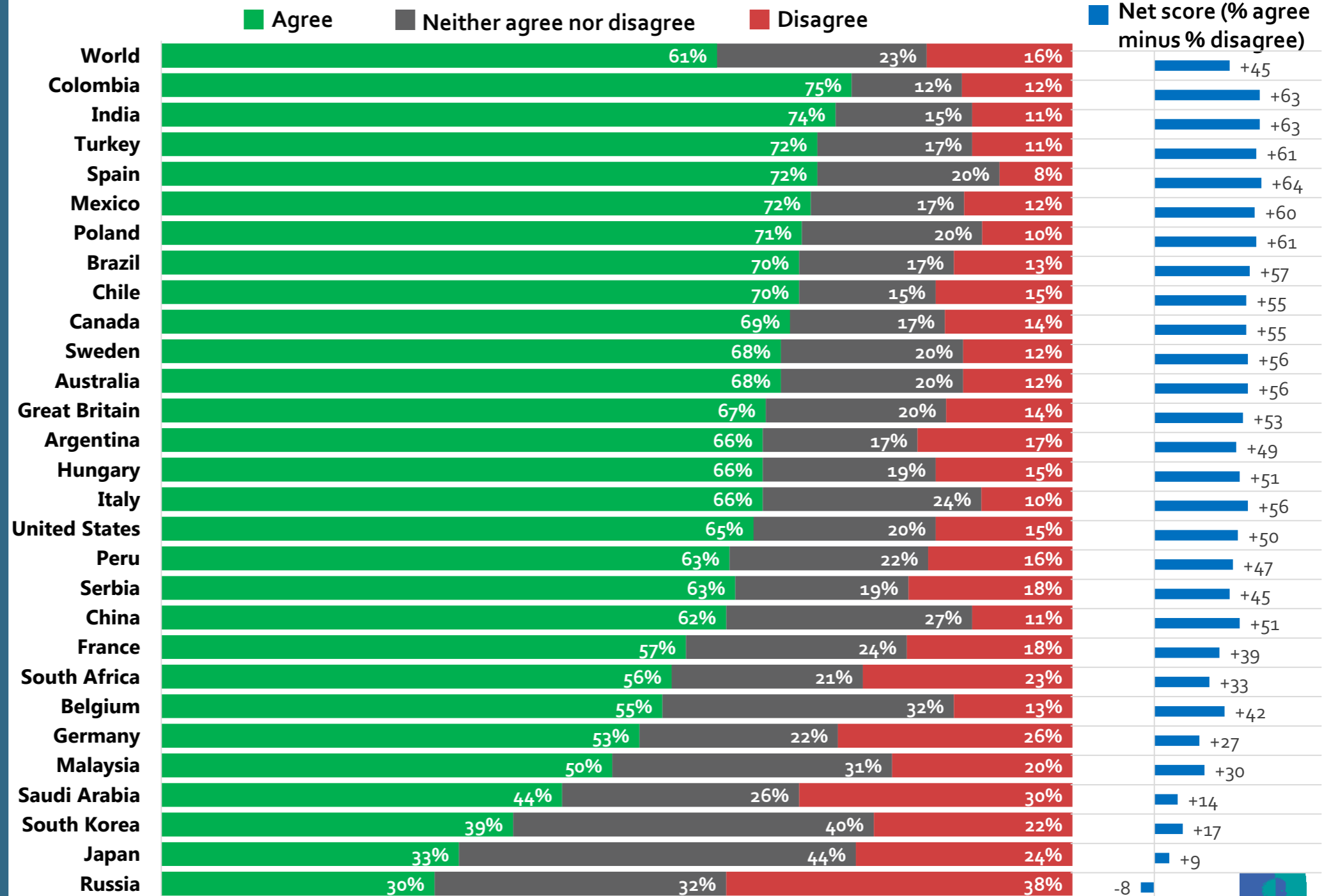


Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018



Willingness to Donate Organs

QB6. Now, thinking about you personally, to what extent do you agree or disagree with the following statement? – *In case of sudden death, I would allow my organs to be removed in order to help others in need.*

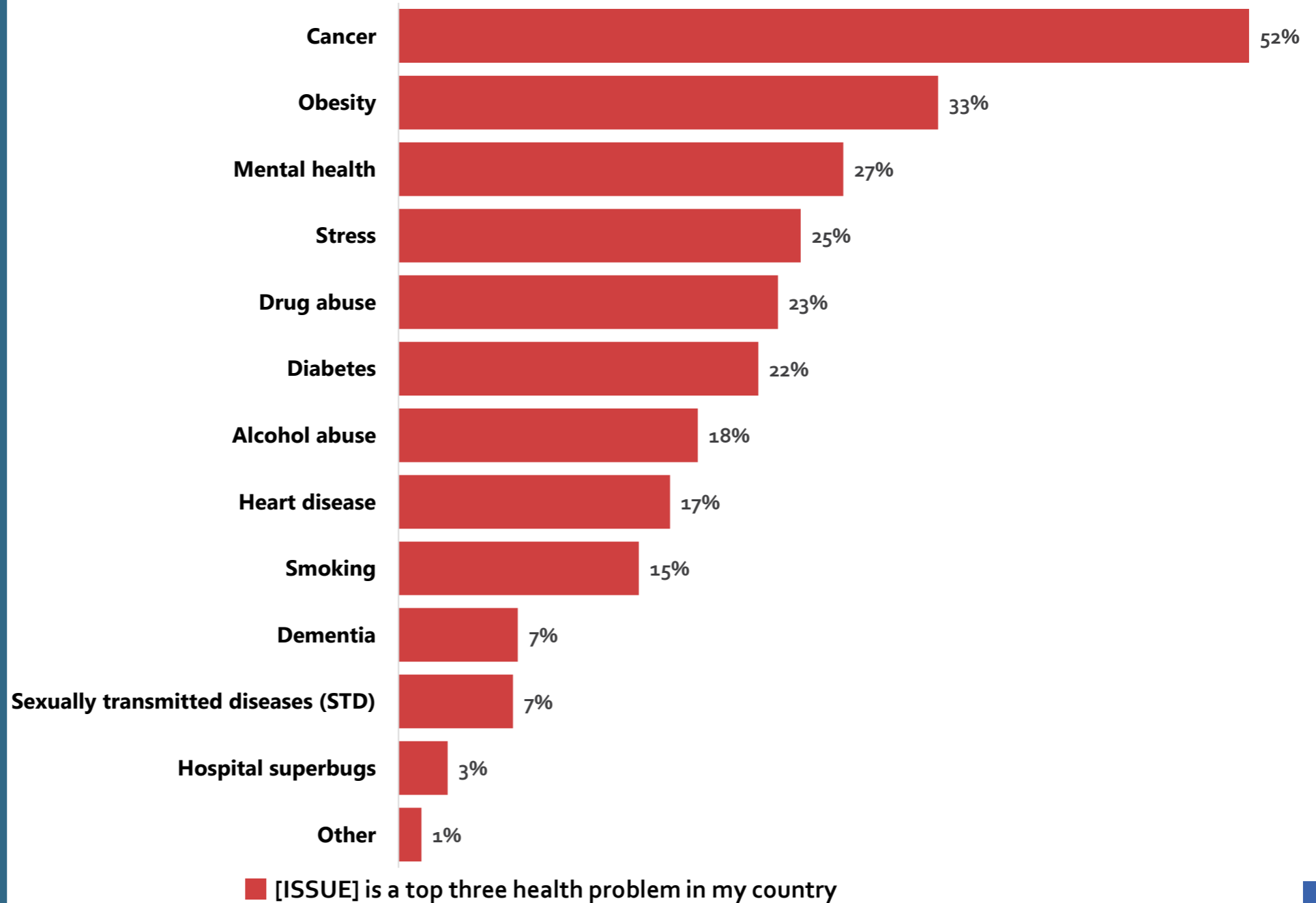


Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018



Public Health Concerns – Globally

QB1. Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?



Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018

Top 3 Public Health Concerns per Country

Top 3 Issues in each country	WORLD	ARG	AUS	BEL	BRA	CAN	CHL	CHN	COL	FRA	GBR	DEU	HUN	IND	ITA	JPN	KOR	MEX	MYS	PER	POL	RUS	SAU	SEK	ZAF	ESP	SWI	TUR	USA
Cancer	1	2	3	1	1	1	2	1	2	1	2	1	1	2	1	1	3	3	3	1	1	1	3	1	2	1	3	1	2
Obesity	2		2	3	3	3	1	3		2	1	3						1	1		2		2			2		2	3
Mental health	3		1			2		2			3	2					1			2							1		1
Stress		3		2					3	3			2		2	2	2							3		3	2		
Drug abuse		1			2		3		1																1			3	
Diabetes														1				2	2	3			1						
Alcohol abuse													3								3	2			3				
Heart disease														3								3		2					
Smoking															3														
Dementia																3													
Sexually transmitted diseases (STD)																													
Hospital superbugs																													
Other																													

QB1. Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Adoption of Healthcare Technology

How do we integrate technology into our healthcare?

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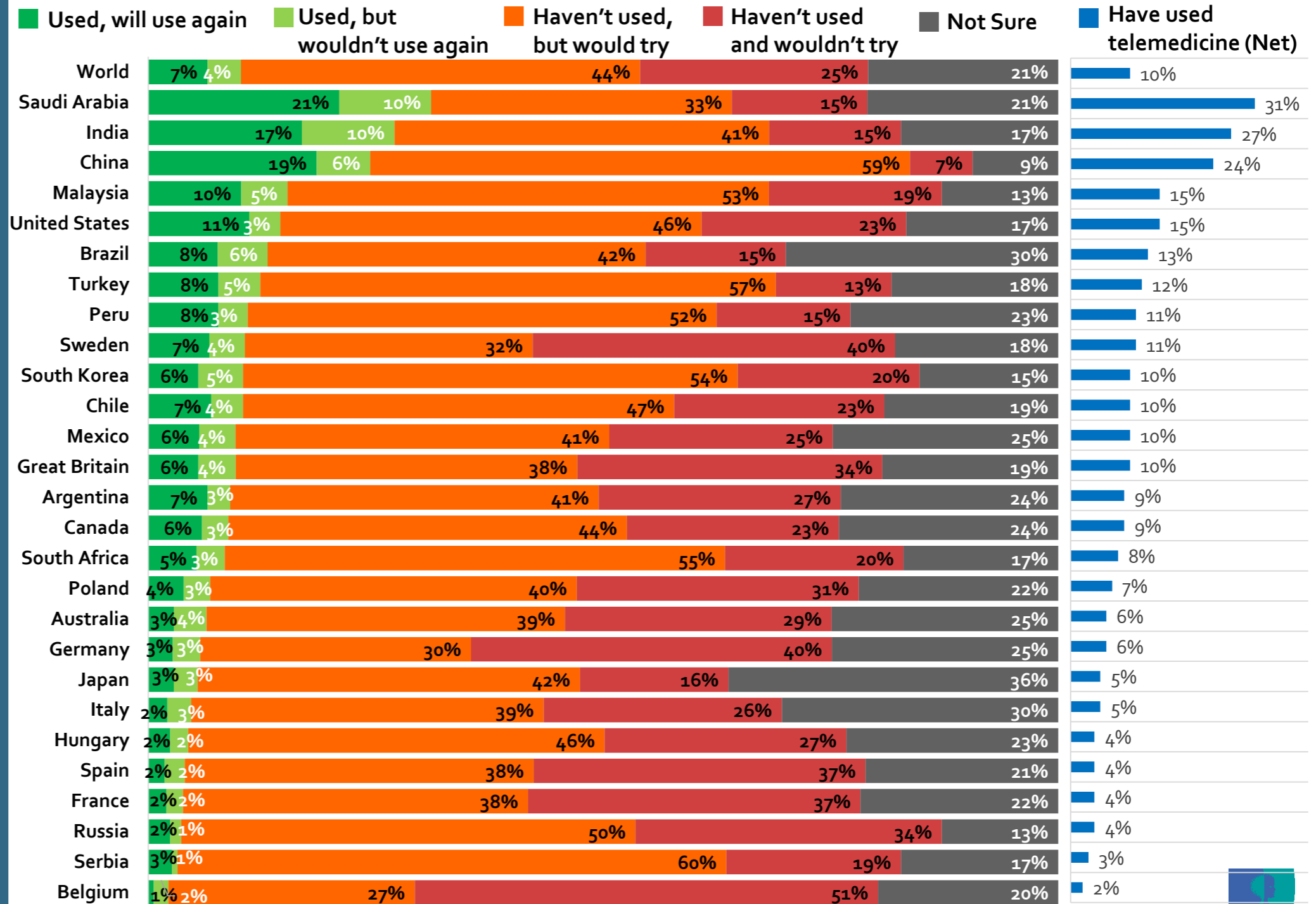
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Usage of Telemedicine

QA4. Telemedicine allows patients to consult doctors or specialists without having to visit them in person, using video, audio and/or messaging applications on a computer, a tablet or a smartphone. Which of the following best describes your thoughts on using telemedicine?

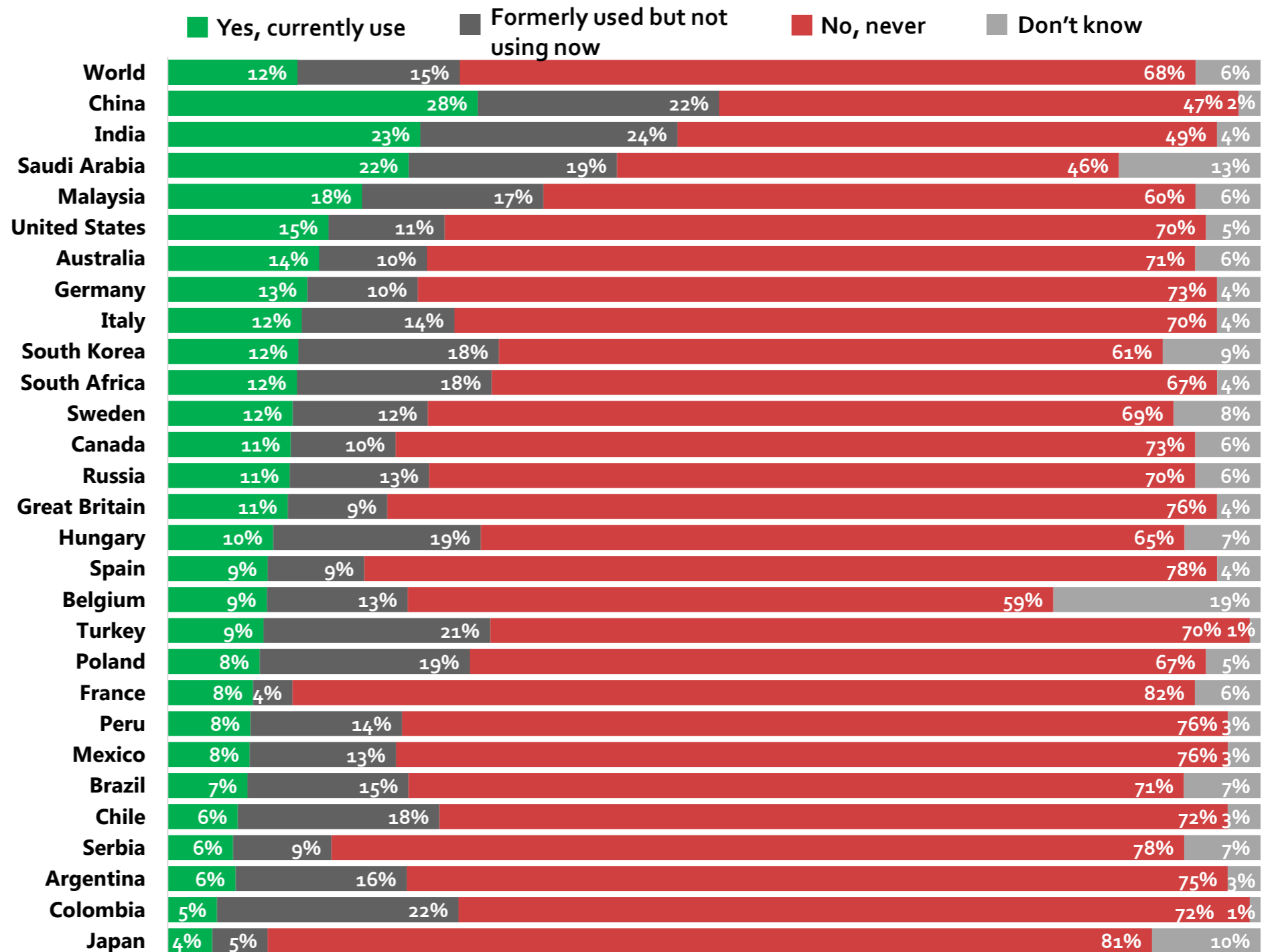


Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018



Usage of a Connected Health Device

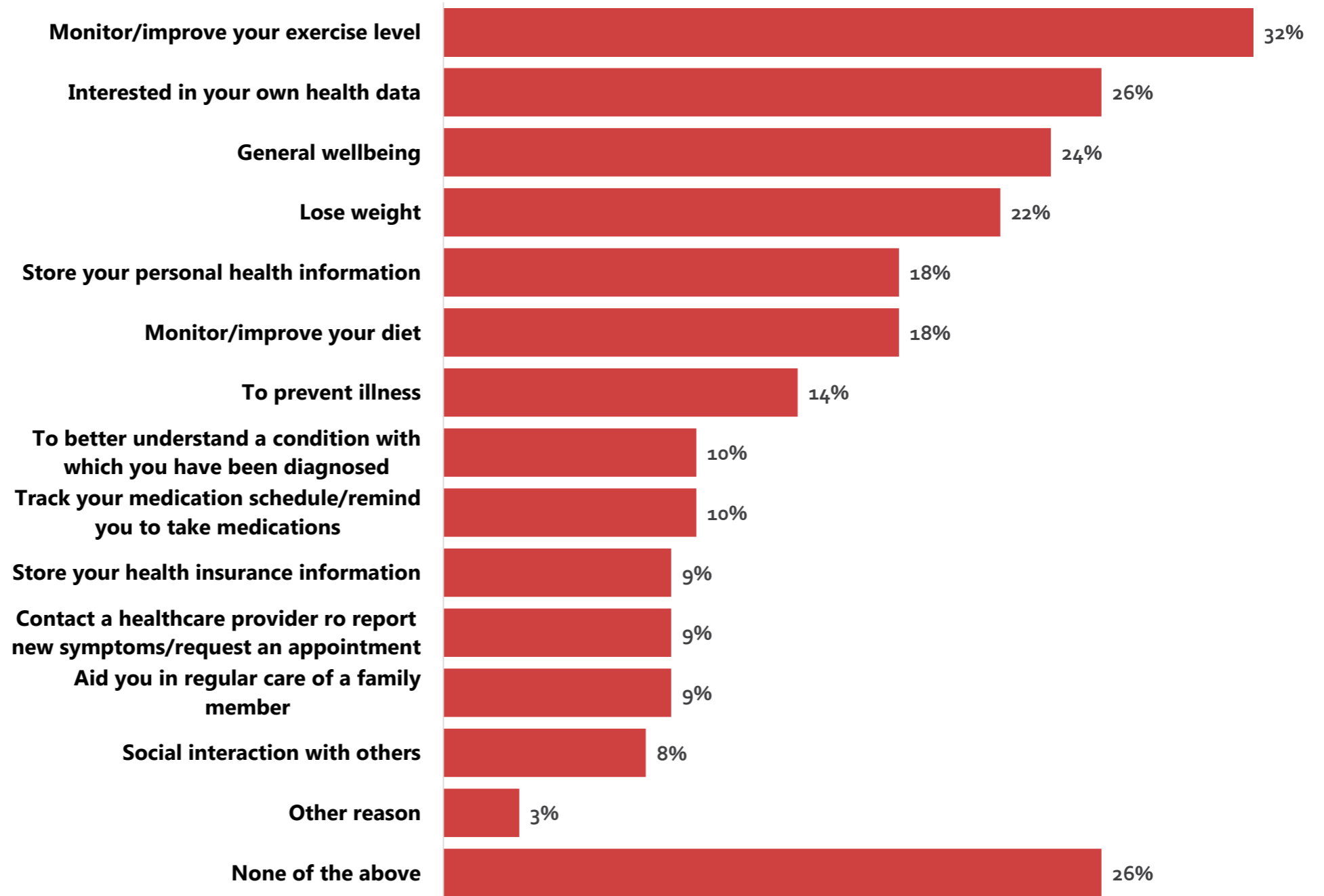
QB9. Do you currently, or have you ever, used a connected health device or tool to manage your health?



Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018

Reasons for Connected Health Device Usage – Globally

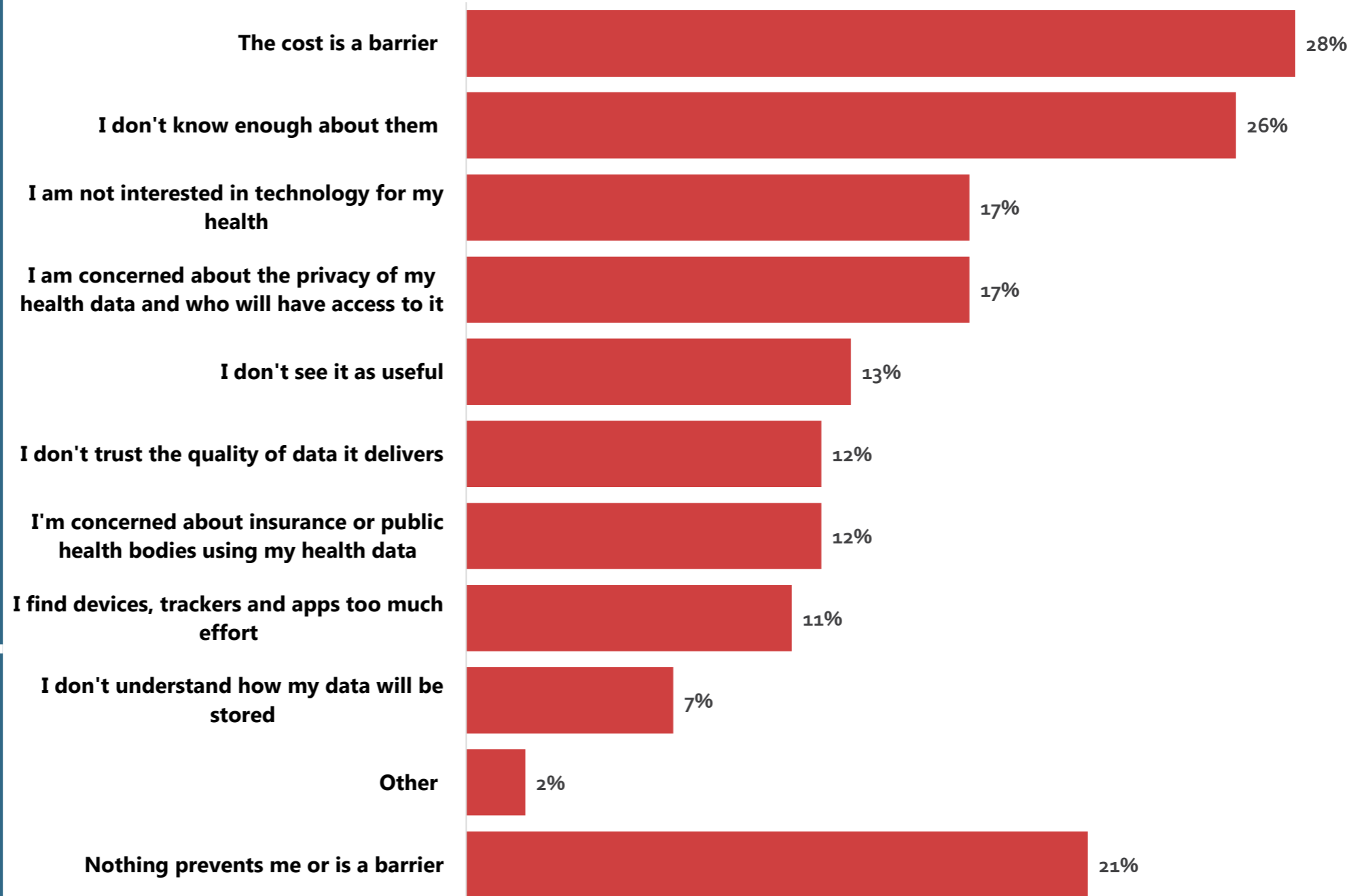
QB10. Which of the following, if any, are the reasons you currently use a connected health device or tool to manage your health?



Base: 3,272 online adults aged 16-64 across 28 countries who currently use a connected health device May 25 – June 8, 2018

Barriers to Connected Health Device Usage – Globally

QB11. What, if anything, prevents you from using/owning a connected device or tool for your health?



Base: 19,293 online adults aged 16-64 across 28 countries who do not currently use a connected health device May 25 – June 8, 2018

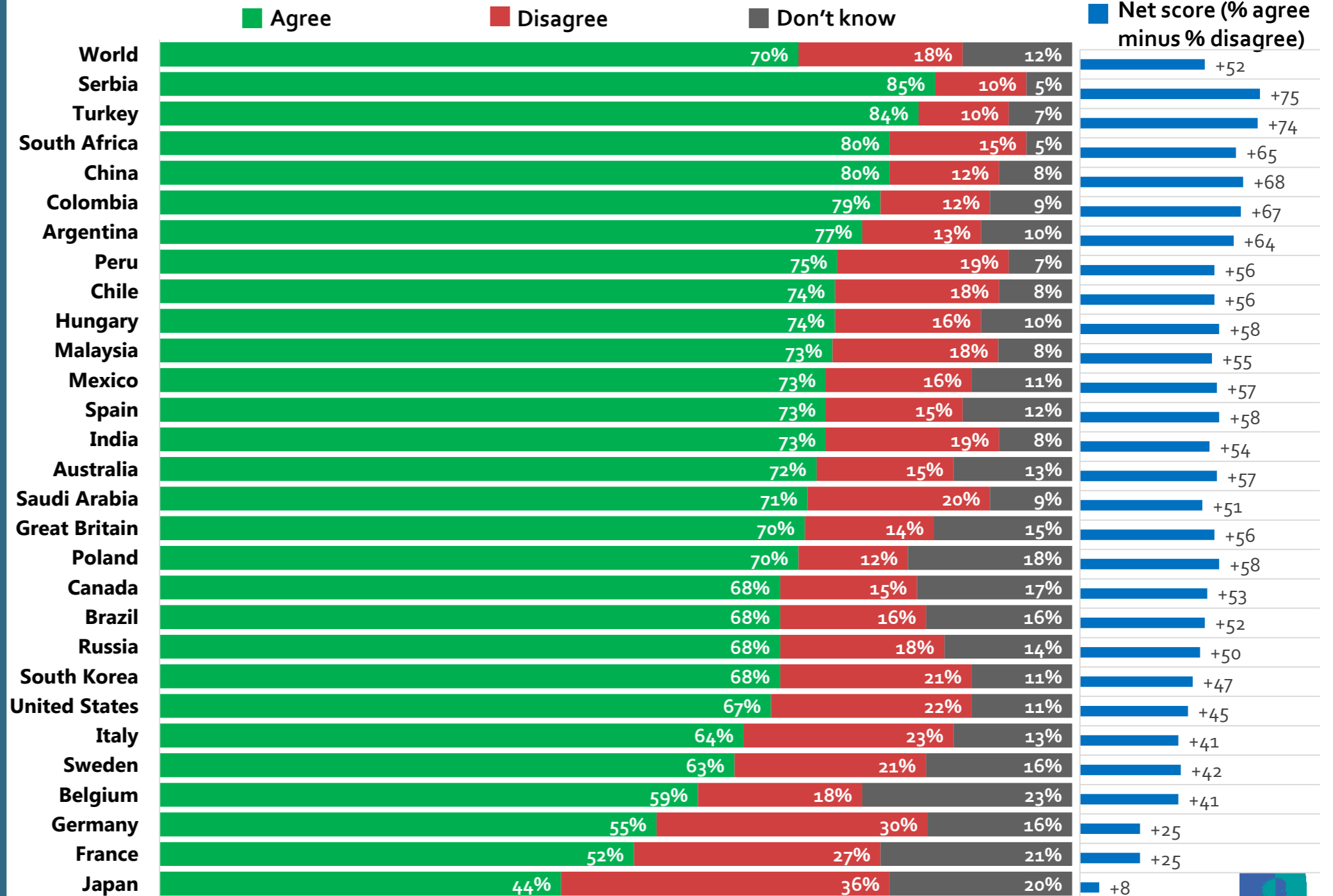
Barriers to Connected Health Device Usage – Summary

QB11. What, if anything, prevents you from using/owning a connected device or tool for your health?	WORLD	ARG	AUS	BEL	BRA	CAN	CHL	CHN	COL	ESP	FRA	GBR	DEU	HUN	IND	ITA	JPN	KOR	MEX	MYS	PER	POL	RUS	SAU	SEK	ZAF	SWE	TUR	USA
The cost is a barrier	28%	33%	25%	17%	30%	23%	33%	25%	36%	19%	20%	18%	20%	31%	31%	20%	24%	33%	41%	44%	43%	27%	39%	19%	10%	46%	16%	34%	26%
I don't know enough about them	26%	30%	17%	23%	27%	23%	32%	25%	36%	24%	16%	15%	18%	35%	18%	14%	31%	18%	36%	32%	33%	32%	31%	13%	33%	25%	22%	29%	16%
I am not interested in technology for my health	17%	19%	22%	21%	11%	20%	18%	10%	10%	16%	25%	27%	27%	8%	20%	26%	23%	11%	14%	15%	10%	16%	13%	17%	6%	18%	26%	16%	28%
I am concerned about the privacy of my health data and who will have access to it	17%	18%	15%	19%	15%	15%	26%	25%	21%	15%	21%	14%	24%	10%	28%	7%	9%	11%	24%	27%	30%	16%	9%	18%	9%	21%	10%	8%	17%
I don't see it as useful	13%	10%	17%	18%	8%	14%	8%	20%	7%	8%	22%	15%	20%	8%	13%	20%	10%	32%	9%	11%	6%	5%	19%	8%	5%	11%	20%	8%	16%
I don't trust the quality of data it delivers	12%	12%	10%	11%	10%	9%	14%	13%	14%	9%	11%	13%	14%	7%	17%	10%	10%	14%	17%	11%	16%	10%	19%	13%	8%	9%	16%	15%	10%
I am concerned about insurance companies/public health bodies using my health data	12%	14%	11%	12%	10%	11%	18%	20%	15%	11%	15%	8%	16%	7%	19%	6%	4%	6%	13%	21%	17%	12%	7%	12%	4%	13%	9%	9%	12%
I find devices, trackers and apps too much effort	11%	9%	14%	10%	8%	13%	6%	27%	5%	5%	5%	12%	13%	3%	24%	13%	13%	10%	5%	16%	6%	6%	6%	19%	4%	18%	18%	10%	12%
I don't understand how my data will be stored	7%	10%	6%	4%	11%	8%	10%	4%	14%	7%	5%	6%	9%	8%	7%	4%	7%	4%	8%	11%	14%	7%	8%	7%	5%	8%	4%	3%	7%
Other	2%	4%	2%	2%	1%	2%	2%	0%	3%	2%	1%	3%	2%	2%	1%	1%	0%	1%	4%	1%	3%	1%	3%	1%	1%	1%	4%	2%	2%
Nothing prevents me or is a barrier	21%	20%	28%	21%	27%	28%	18%	10%	19%	31%	25%	27%	19%	24%	14%	19%	20%	18%	16%	14%	12%	24%	14%	26%	30%	15%	27%	25%	26%

Base: 19,293 online adults aged 16-64 across 28 countries who do not currently use a connected health device May 25 – June 8, 2018

Would Use Connected Health Device if Recommended by Own Physician

QB12. To what extent do you agree or disagree, at all, with the following statement – *If my doctor recommended that I use a connected health device or tool as part of my treatment plan I would use it.*

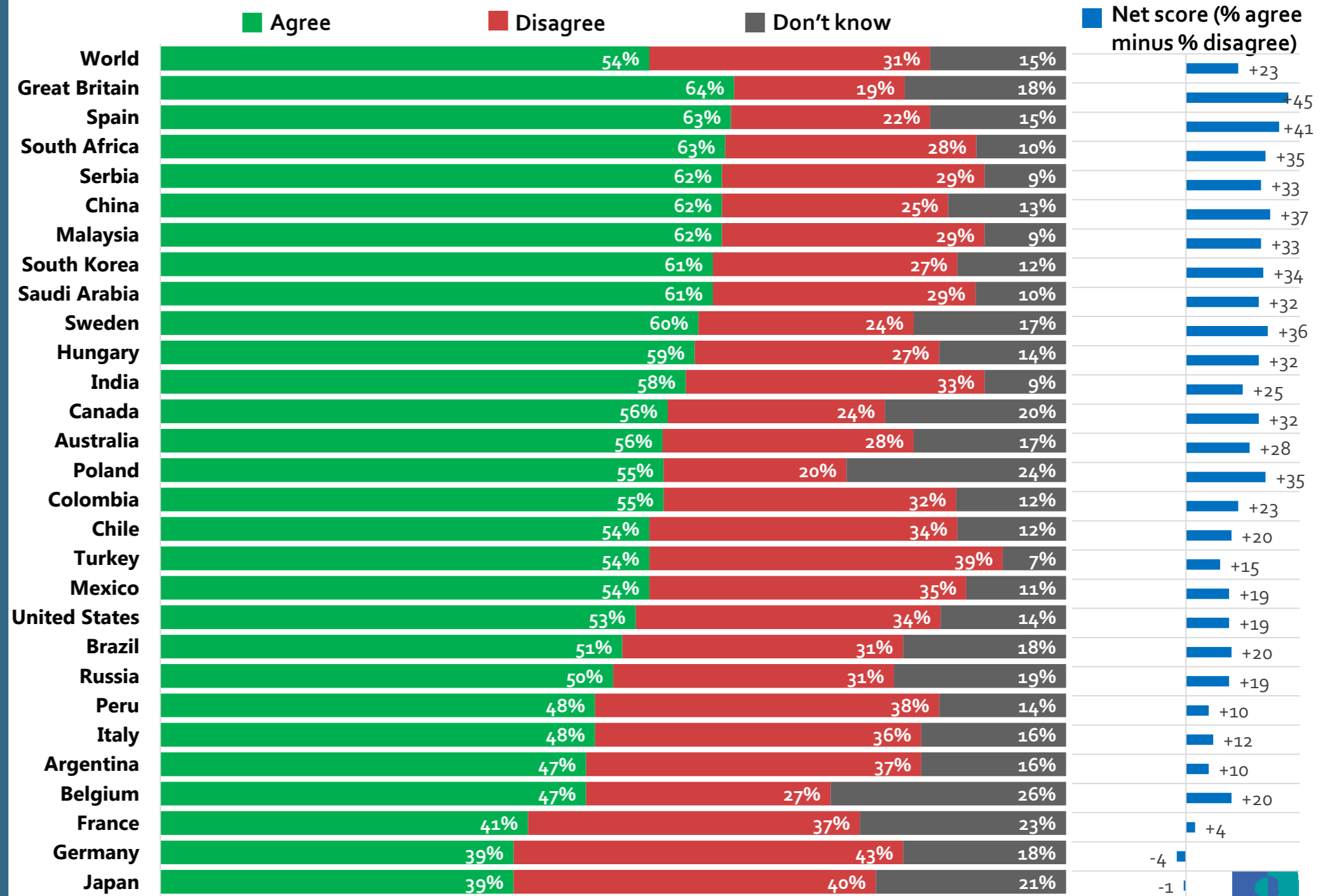


Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018



Would Use Connected Health Device if Recommended by a Nurse

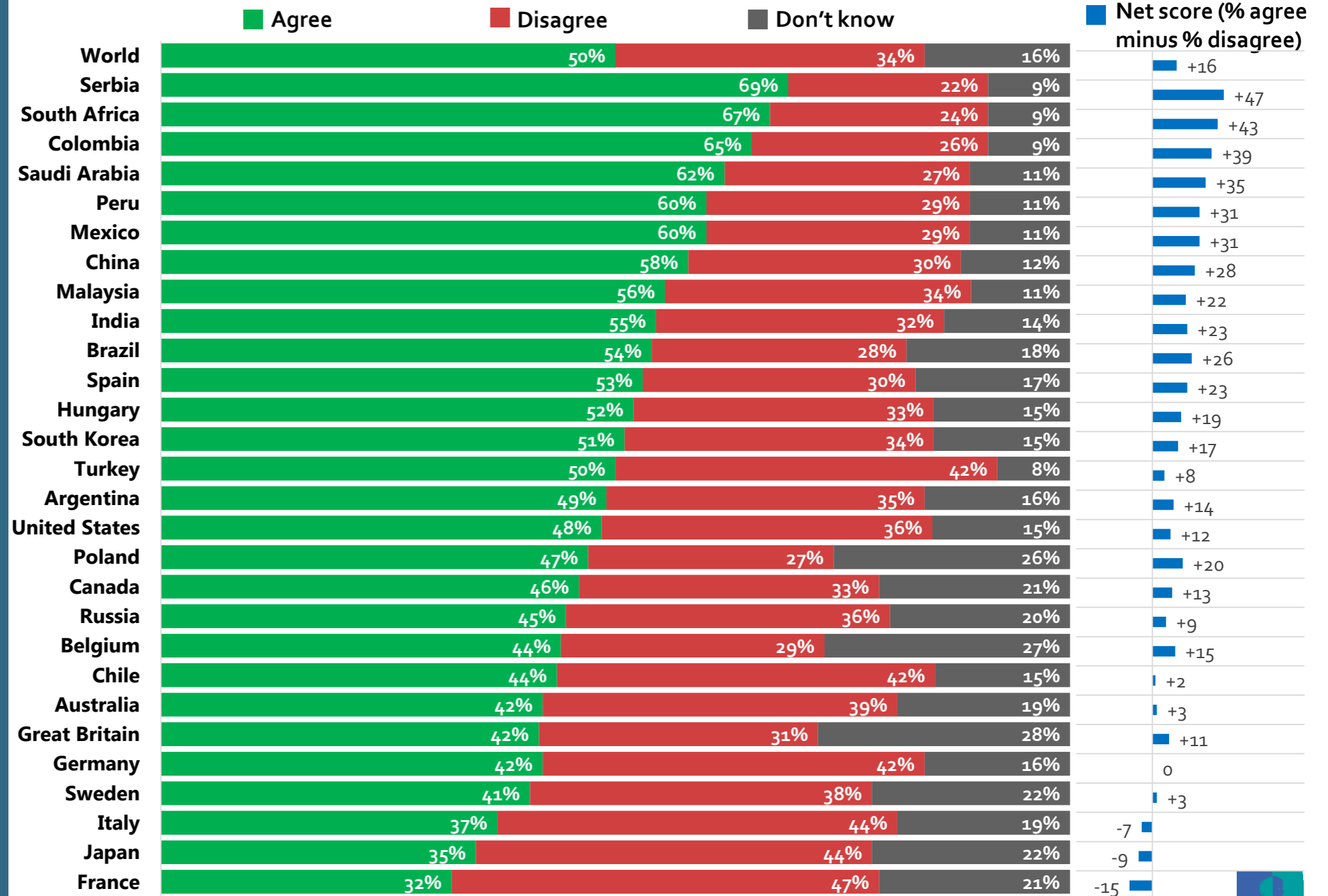
QB12. To what extent do you agree or disagree, if at all, with the following statements? – *If a nurse recommended that I use a device, tracker or app as part of my treatment plan I would use it.*



Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018

Would Use Connected Health Device if Recommended by Health Insurance

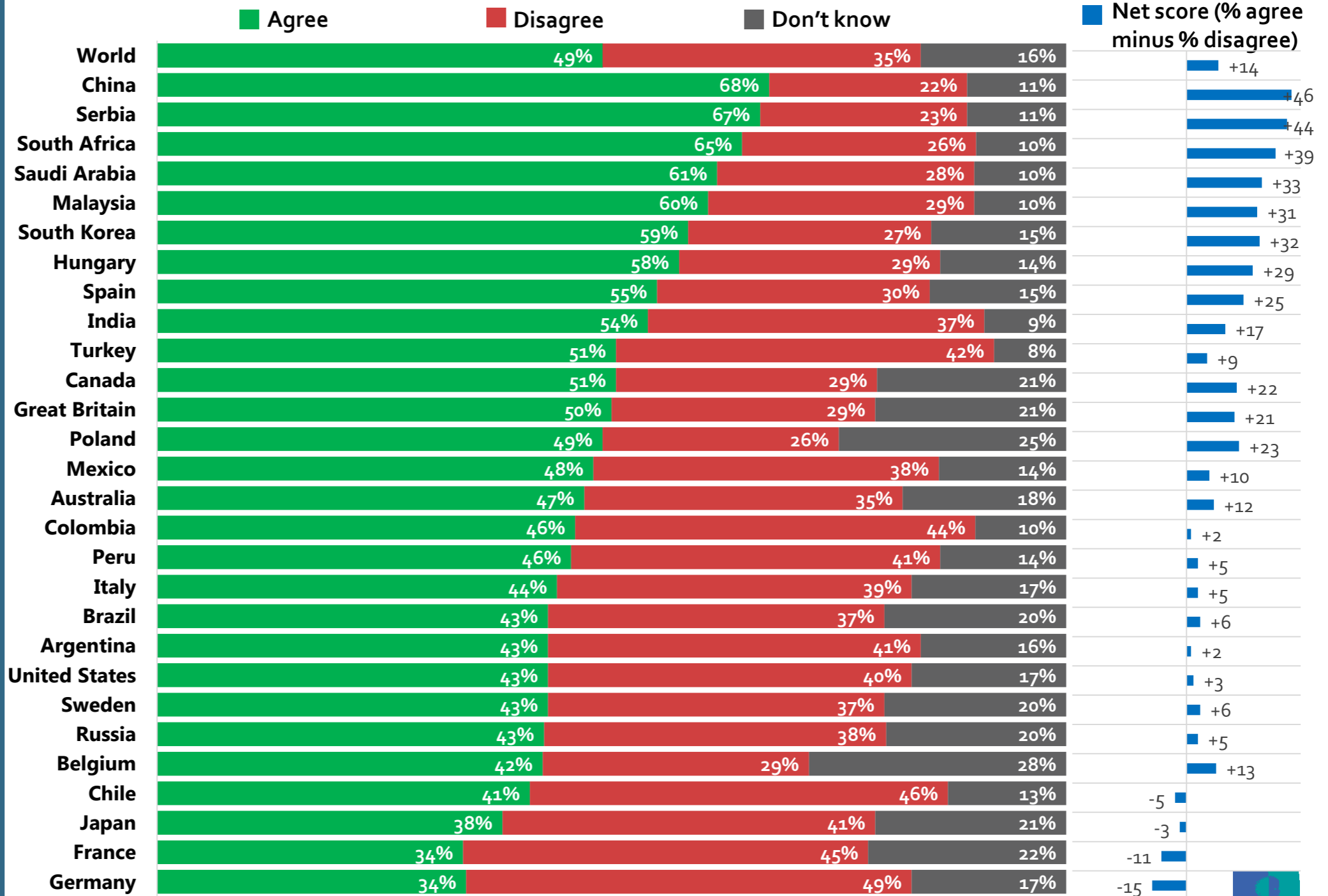
QB12. To what extent do you agree or disagree, if at all, with the following statements? – *If my health insurance company recommended that I use a device, tracker or app as part of my treatment plan I would use it.*



Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018

Would Use Connected Health Device if Recommended by Own Pharmacist

QB12. To what extent do you agree or disagree, if at all, with the following statements? – *If my pharmacist recommended that I use a connected health device or tool as part of my treatment plan I would use it.*

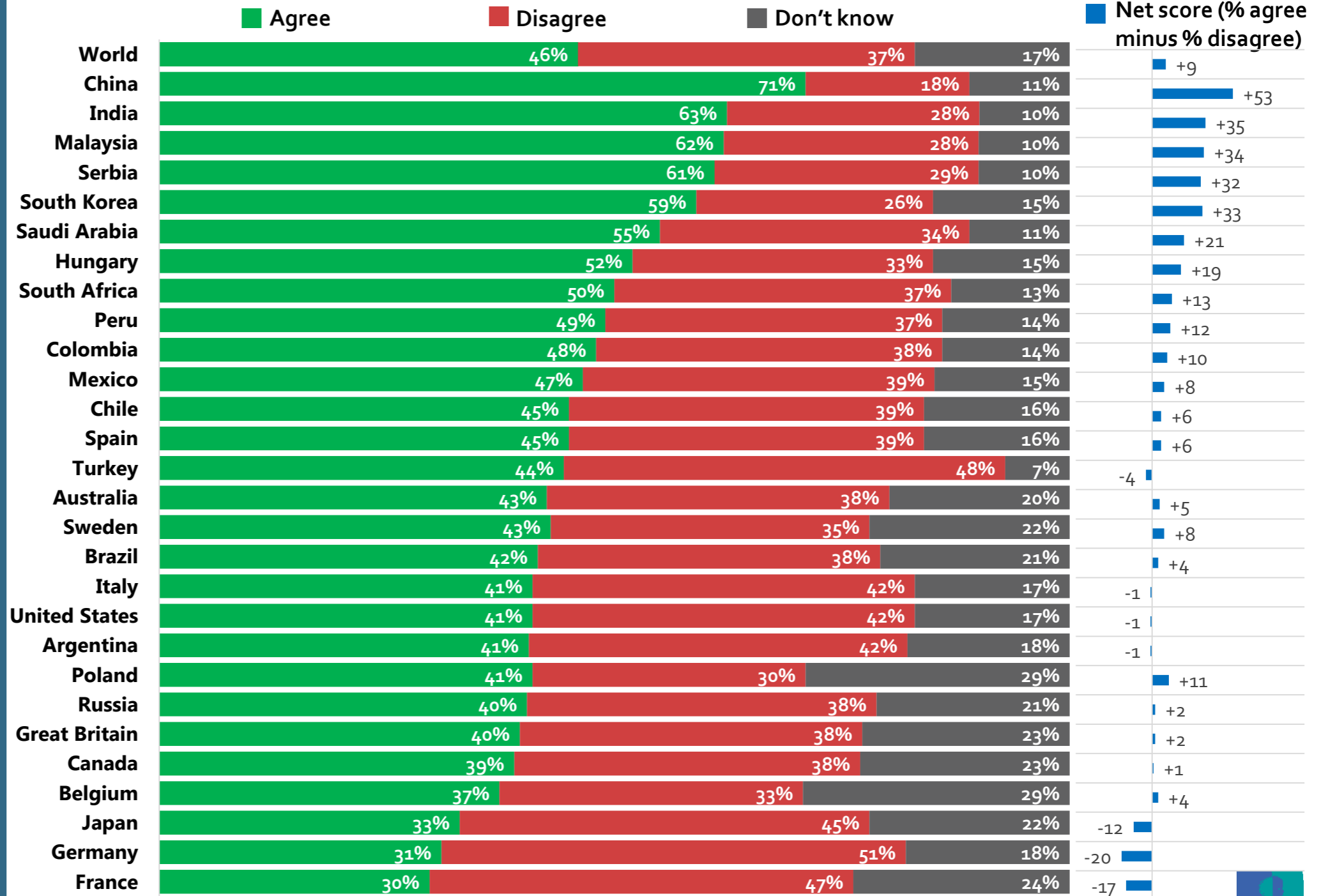


Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018



Would Use Connected Health Device if Recommended by a Friend or Family Member

QB12. To what extent do you agree or disagree, if at all, with the following statements? – *If a friend or family member recommended that I use a device, tracker or app as part of my treatment plan I would use it.*



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Sources of Information

Where do citizens go to for healthcare information?

IPSOS GLOBAL ADVISOR

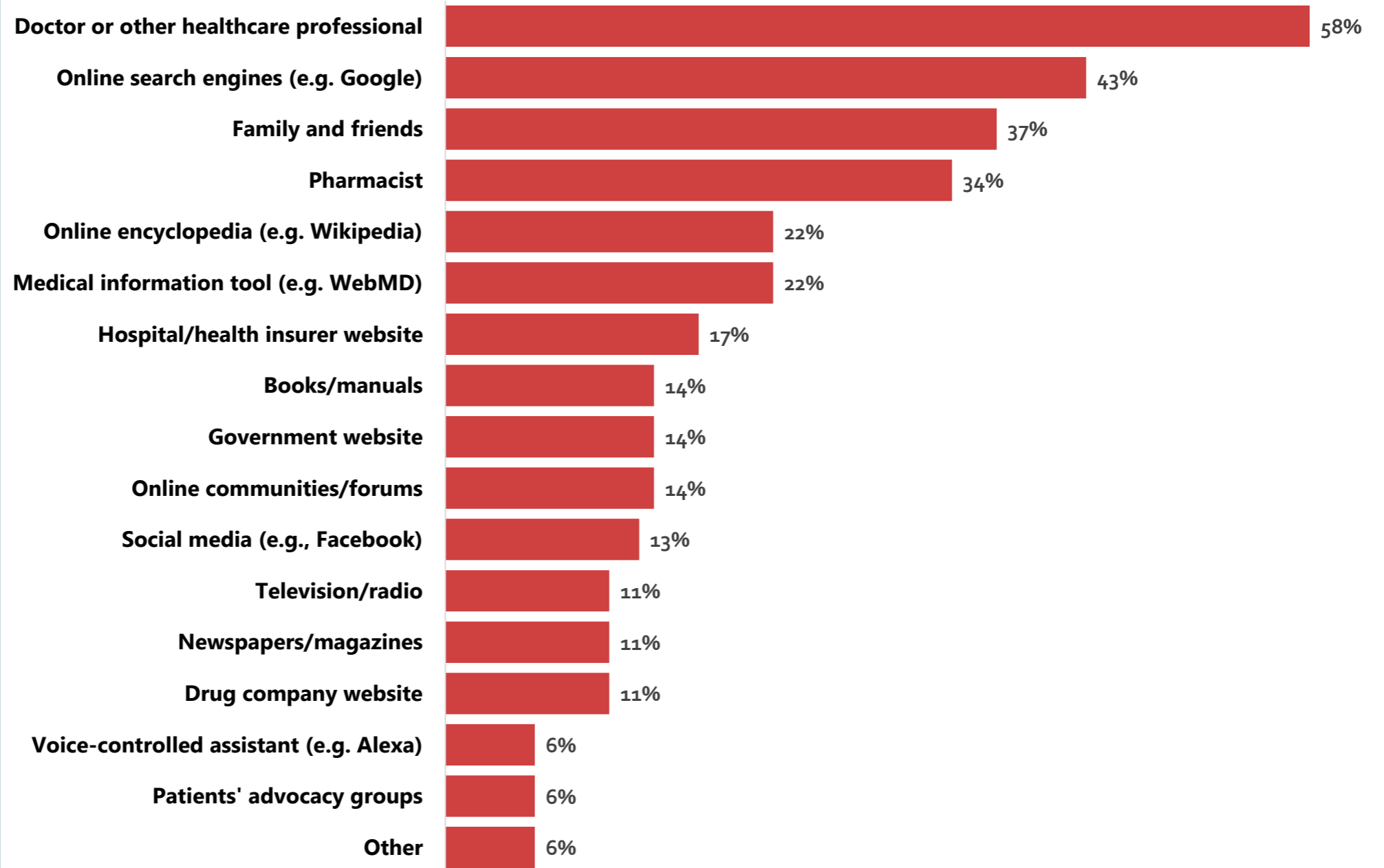
GAME CHANGERS



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Sources of Healthcare-Related Information – Globally

QA5. Which of the following do you use or go to when you need information about healthcare, symptoms of diseases, treatments, etc.



■ I use this when I need health related information

Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018

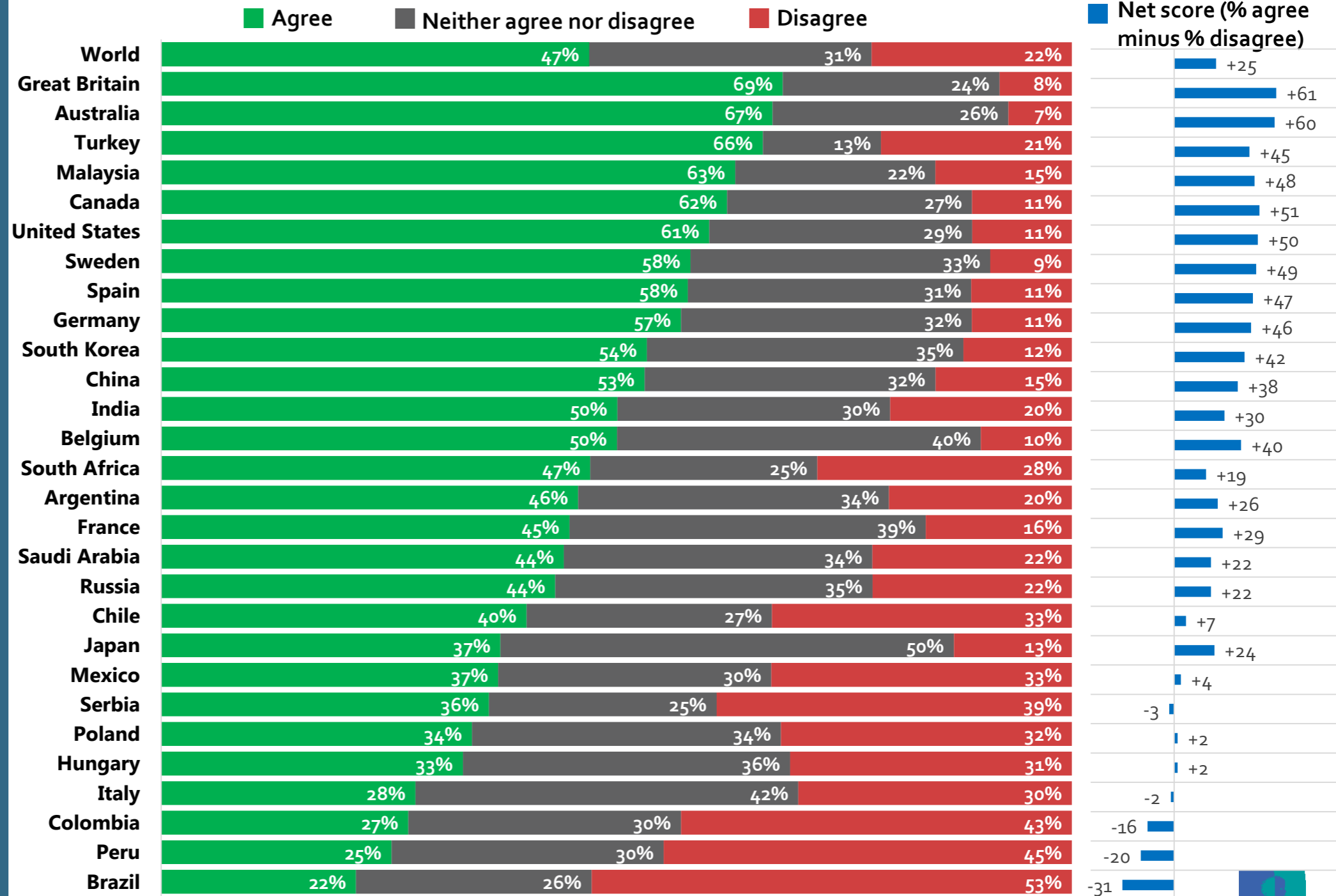
Sources of Healthcare-Related Information– Summary

QA5. Which of the following do you use or go to when you need information about healthcare, symptoms of diseases, treatments, etc.?	WORLD	ARG	AUS	BEL	BRA	CAN	CHL	CHN	FRA	GBR	DEU	HUN	IND	ITA	JPN	KOR	MYS	MEX	PER	POL	RUS	SAU	SRB	ZAF	ESP	SWE	TUR	USA
Doctor or other healthcare professional	58%	65%	66%	75%	50%	63%	62%	48%	56%	52%	55%	61%	53%	59%	22%	48%	61%	60%	58%	67%	67%	34%	73%	63%	64%	57%	64%	56%
Online search engines (e.g., Google, Yahoo, Bing)	43%	39%	42%	36%	35%	44%	43%	40%	31%	40%	39%	47%	50%	36%	48%	47%	49%	38%	44%	40%	53%	35%	56%	58%	26%	49%	55%	47%
Family and friends	37%	42%	35%	32%	36%	34%	45%	36%	30%	29%	35%	34%	46%	24%	24%	29%	43%	43%	44%	43%	44%	29%	54%	46%	31%	38%	41%	38%
Pharmacist	34%	35%	39%	53%	29%	42%	33%	14%	43%	36%	32%	36%	24%	38%	7%	25%	46%	30%	41%	34%	28%	35%	40%	60%	44%	8%	46%	22%
Online encyclopedia (e.g., Wikipedia)	22%	32%	14%	20%	14%	20%	28%	26%	10%	16%	19%	21%	32%	17%	30%	13%	20%	25%	32%	17%	25%	21%	31%	34%	17%	17%	24%	21%
Medical/health information website/application (e.g., WebMD, Doctissimo)	22%	16%	23%	17%	16%	31%	22%	33%	23%	28%	16%	25%	29%	15%	10%	12%	22%	17%	17%	13%	14%	18%	31%	33%	9%	17%	37%	46%
Hospital/health system/health insurer website/application	17%	9%	16%	11%	14%	15%	12%	37%	8%	18%	9%	20%	32%	12%	18%	20%	24%	10%	11%	16%	14%	15%	17%	27%	4%	27%	32%	19%
Books/manuals	14%	15%	6%	8%	15%	11%	21%	16%	8%	10%	13%	11%	23%	11%	10%	7%	14%	19%	21%	19%	22%	13%	24%	25%	9%	11%	13%	12%
Government/public health authority website/application	14%	13%	17%	14%	13%	15%	16%	20%	11%	24%	6%	4%	21%	14%	12%	7%	29%	12%	10%	5%	11%	16%	14%	15%	7%	30%	13%	10%
Online communities/forums/message boards	14%	13%	10%	9%	7%	13%	16%	15%	8%	11%	14%	21%	27%	9%	8%	22%	16%	10%	15%	17%	11%	9%	23%	24%	6%	8%	23%	17%
Social media (e.g., Facebook)	13%	16%	7%	5%	16%	8%	16%	16%	4%	6%	5%	12%	27%	7%	7%	8%	33%	18%	29%	9%	6%	20%	17%	17%	6%	7%	25%	12%
Television/radio	11%	14%	5%	7%	14%	5%	13%	10%	6%	5%	9%	8%	22%	7%	18%	12%	19%	12%	21%	7%	6%	13%	21%	14%	6%	4%	17%	7%
Newspapers/magazines	11%	9%	6%	7%	15%	5%	10%	9%	7%	6%	11%	6%	31%	8%	10%	7%	25%	10%	17%	10%	5%	10%	17%	13%	5%	7%	12%	7%
Drug company website	11%	13%	7%	6%	10%	7%	22%	11%	4%	5%	5%	8%	19%	9%	11%	3%	19%	17%	20%	17%	10%	15%	16%	15%	5%	12%	13%	10%
Voice-controlled search application on a smart device (e.g., Siri, Google Assistant, Alexa)	6%	7%	2%	1%	10%	2%	6%	16%	1%	2%	3%	1%	14%	3%	3%	6%	12%	8%	9%	1%	5%	7%	4%	7%	3%	2%	13%	5%
Patients'/condition sufferers' organizations/advocacy groups	6%	5%	7%	5%	3%	7%	6%	7%	2%	9%	5%	7%	15%	4%	3%	4%	15%	4%	5%	4%	0%	7%	6%	9%	4%	8%	14%	8%
Other	6%	6%	5%	3%	12%	6%	6%	3%	9%	7%	13%	7%	4%	6%	16%	4%	7%	6%	8%	3%	5%	7%	2%	4%	8%	8%	2%	6%

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Availability of Information about Healthcare Services

QB4. To what extent do you agree or disagree with the following statements? – *In my country, information about healthcare services is readily available when I need it.*

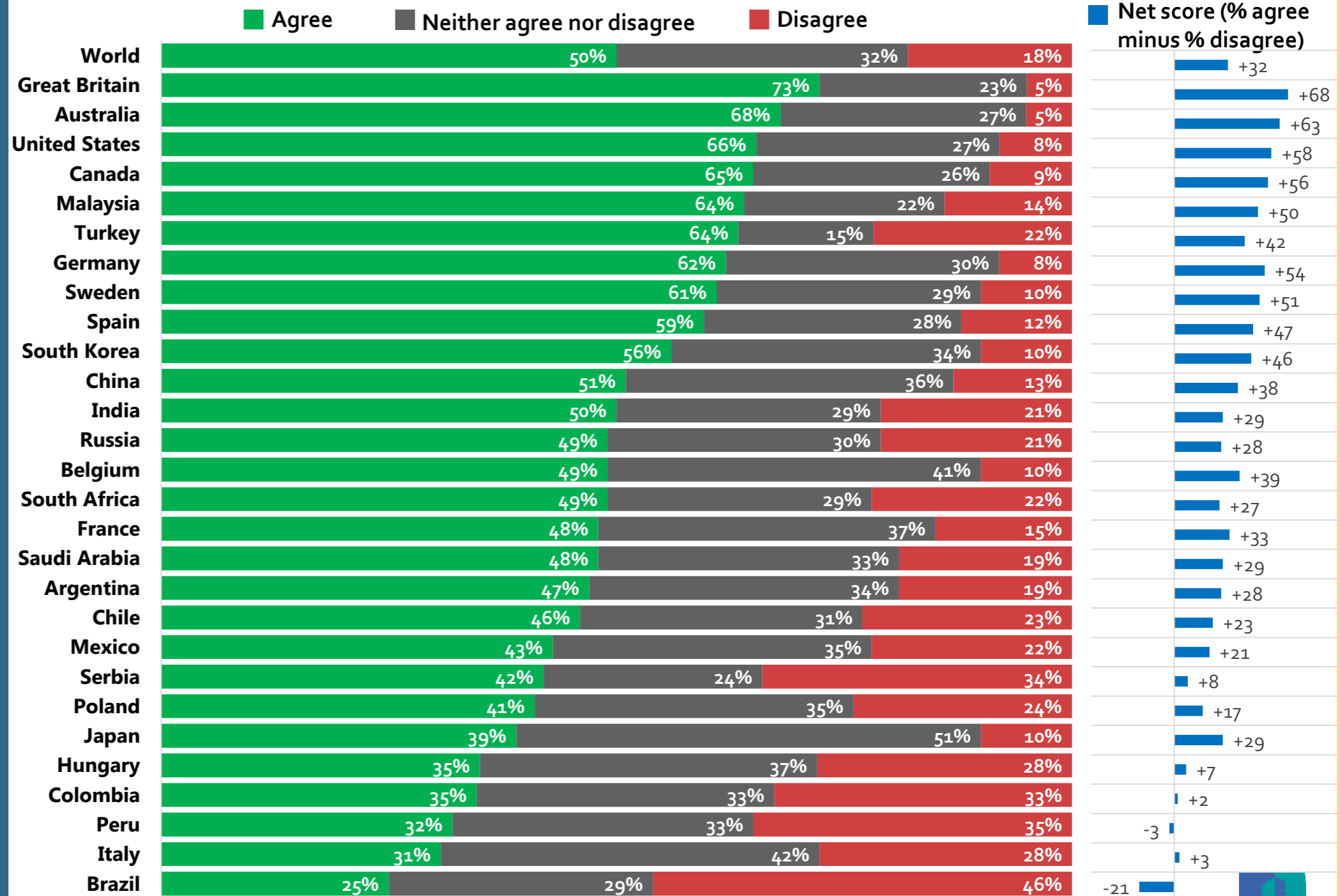


Base: 23,249 online adults aged 16-64 across 28 countries May 25 – June 8, 2018



Availability of Information to Look After Own Health

QB4. To what extent do you agree or disagree with the statement? – *In my country, information about how to look after my health is readily available when I need it.*



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GAME CHANGERS

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