

IPSOS CONTEXT ADVANTAGE

Assessing the Healthcare System in the Pandemic World

A data-driven, advisory service to help your organization adapt
and thrive in a changing landscape

December 2020

<https://www.ipsos.com/en-ca/news-polls/healthcare-system-in-canada-held-in-high-esteem-during-the-pandemic>

GAME CHANGERS



CONTEXT TRENDS, KNOWLEDGE ZONES IS PART OF THE FULL SUITE OF IPSOS CONTEXT ADVANTAGE

A data-driven, advisory service to help your organization adapt and thrive in a changing landscape



Context Now

Ipsos Disruption Barometer

Societal stability is a leading indicator of consumer behavior – monthly and quarterly tracking of trend line and insights.



Context Trends Knowledge Zones

Tracking of emerging domestic and global social and economic trends. Deep dives into key issues such as:

- Gen Z, millennials, boomers
- Plastics and waste, climate change
- Health, ageing
- Coronavirus / COVID-19
- Racism



Context Next

Annual Future Cast with 10-year projection re: technology change and impact, society and social cohesion.



Context Reputation

Global trends and country specific tracking of the reputation of hundreds of companies with insights on your reputation levers and how to take action that aligns with current and future societal changes.



Context Social

Real time social media monitoring (volume, sentiment, trends, geo-tagging) of specific issues, events, crisis, etc. via **Ipsos Political and Trends Atlas**.

SUMMARY

1. WHAT WE DID AND KEY OBSERVATIONS
2. HEALTH IN CONTEXT
3. HEALTH CONCERNS
4. HEALTHCARE PERCEPTIONS
5. HEALTHCARE FUTURE

WHAT WE DID AND KEY OBSERVATIONS

1

THE SITUATION

THE ISSUE

The healthcare systems worldwide are being put under extreme pressure by the pandemic. Hospital and ICU utilization are often being stretched to the limit.

So, it is timely to determine the answers to several related questions. For example, how do citizens think their healthcare systems are performing? What health issues do they see as priorities?

WHAT WE DID

Ipsos Public Affairs has been tracking the issue of Healthcare System Quality for years domestically and internationally.

This report tracks our first study conducted in 2018. It is a 27-country Global Advisor survey conducted between September 25th and October 9th, 2020 via the Ipsos Online Panel system among 20,009 adults aged 18-74 in Canada, Malaysia, South Africa, Turkey and the United States, and 16-74 in all 22 other countries (n=1000 Canada).

KEY OBSERVATIONS

HEALTH CONCERNS

Coronavirus has stormed onto the scene this year as the “greatest health problem facing people in my country.” It is ranked #1 in 26 of the 27 countries surveyed.

In Canada, mental health registers as the second most identified health issue. This is much higher than globally.

Cancer ranks third.

HEALTH SERVICES

Canadians provide generally positive assessments of the quality of health-care they receive. Indeed, at 72% positive, Canada ranks 5th of the 27 countries, with ratings higher than they were in 2018.

Canadians from all walks of life are generally positive toward their healthcare system, although this tends to be higher in Alberta and Atlantic, and lower in Quebec and BC, and among lower education and income and Gen X.

Interestingly, while much is often made the differences between Canada and the US, Americans are as positive toward their healthcare system as Canadians are about theirs.

THE FUTURE

More Canadians think their healthcare system will deteriorate than improve in the future. But a majority think that the quality of the system will be maintained. Canadians are among the lower countries perceiving some potential improvement. But of course, Canadians are starting from a higher bar.

Moving forward, human resources (staffing) is the biggest challenge facing the system according to Canadians, followed by wait times, an aging population and bureaucracy. Interestingly, lack of investment or cost to access are not high on the list.

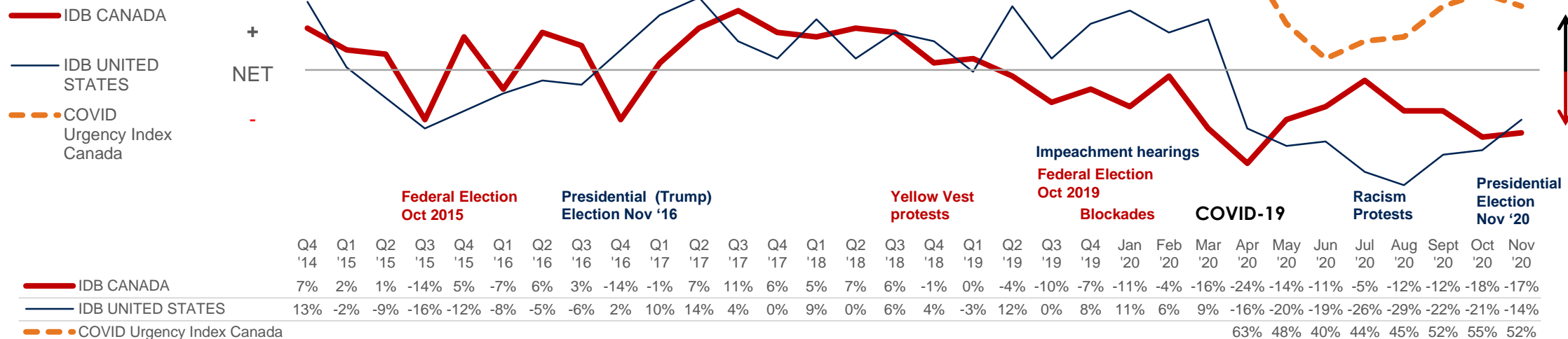
HEALTHCARE IN CONTEXT

2

CONTEXT – CITIZEN/CONSUMER SENTIMENT – IPSOS DISRUPTION BAROMETER (IDB)

Citizen/consumer sentiment influences perceptions of everything in society, including healthcare. After showing signs of a “V” recovery up until July, citizen/consumer sentiment in Canada stalled, fell back in August and has continued much lower into November. At the same time, urgency associated with COVID-19 has continued to creep up recently as the new wave progresses. The latter points to an environment conducive to focusing on healthcare. The former could have either impact – motivate people to be more critical or to be more thankful for what they have.

The COVID Urgency Index is part of our 30+ wave tracking of the pandemic in Canada. It is a combination of 8 items, addressing 3 themes...Personal/family impact, Country/community impact, World impact.



IDB
Higher Consumer Sentiment and Socio-Political Stability
HISTORICAL NORM Normalized
Lower Consumer Sentiment and Socio-Political Stability

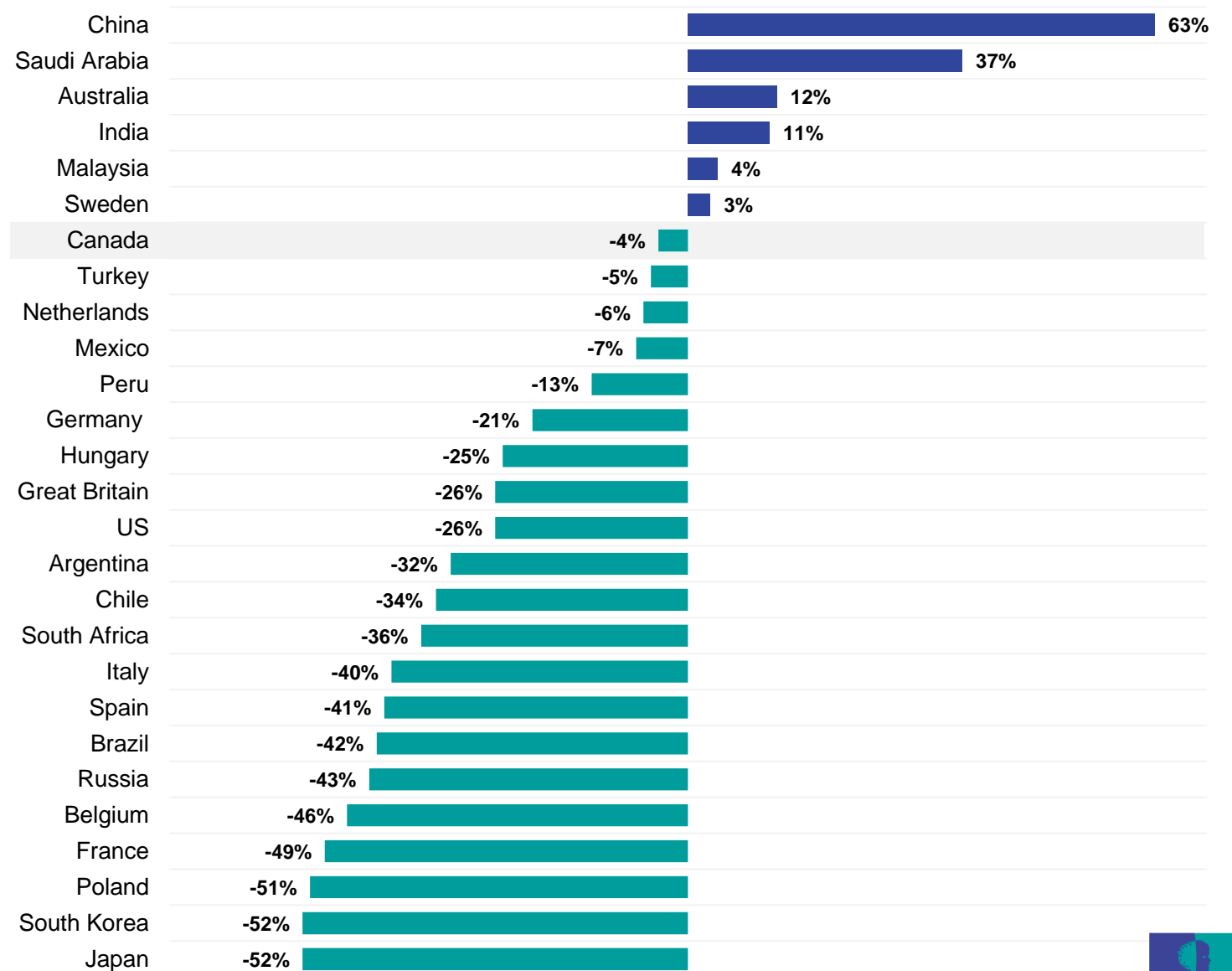


CONTEXT – IPSOS SOCIAL COHESION INDEX (ISCI)

In addition to broad citizen/consumer sentiment, the level of social cohesion in a country shapes attitudes toward the healthcare system. For example, higher social cohesion leads to a “we over me” context for evaluating healthcare. Lower social cohesion leads to the opposite – “me over we.” In this light, social cohesion in Canada is mixed to mildly negative, but is much better than in many other countries.

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Social Cohesion Oct. 2020 (net “solid” minus “weak”)



HEALTH CONCERNS

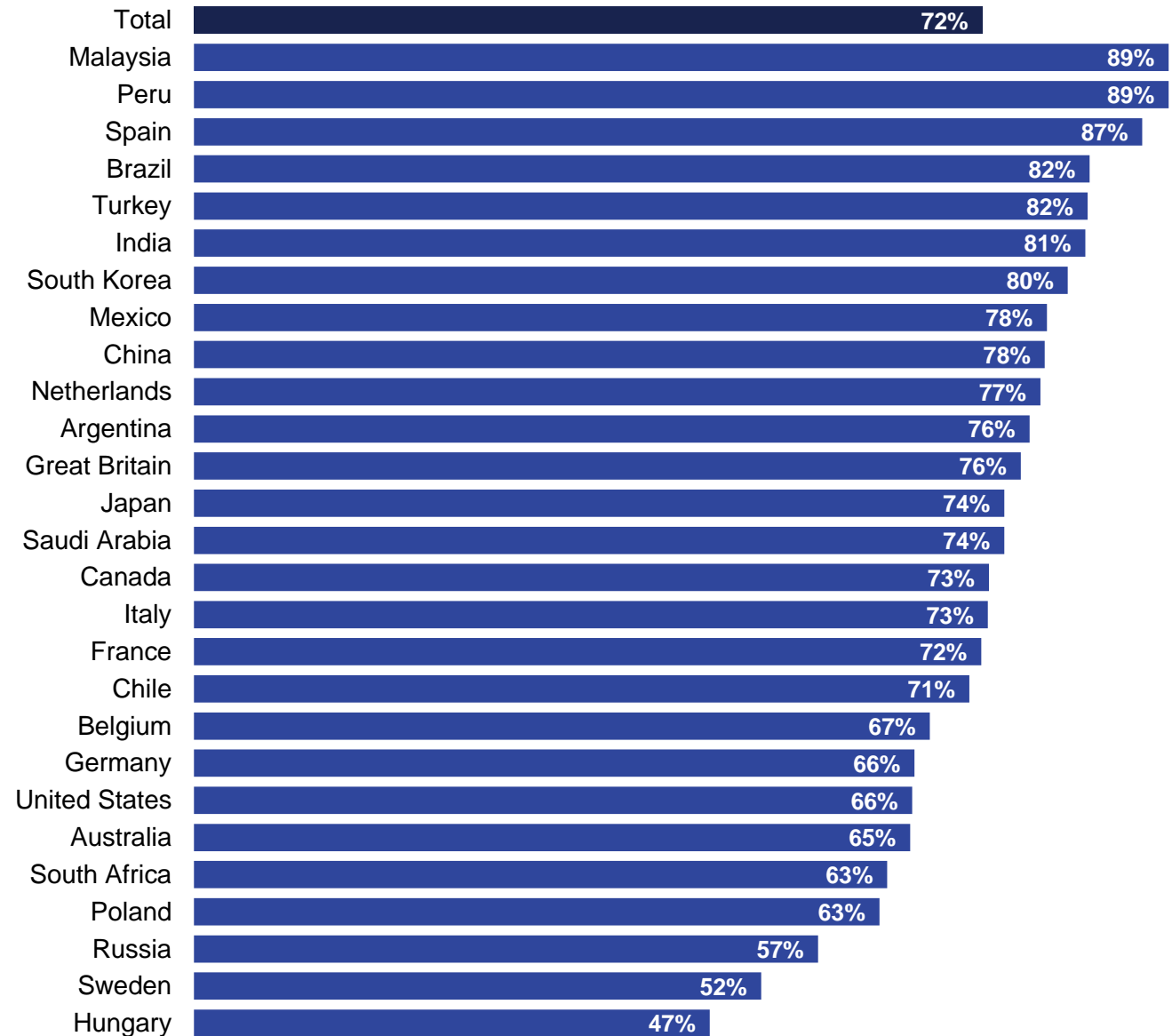
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CORONAVIRUS

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

Not surprisingly, Coronavirus is the top health issue in all countries, except Hungary. Canada ranks in the middle of countries in identifying it as the top health issue, at a full 73%.

% say Coronavirus

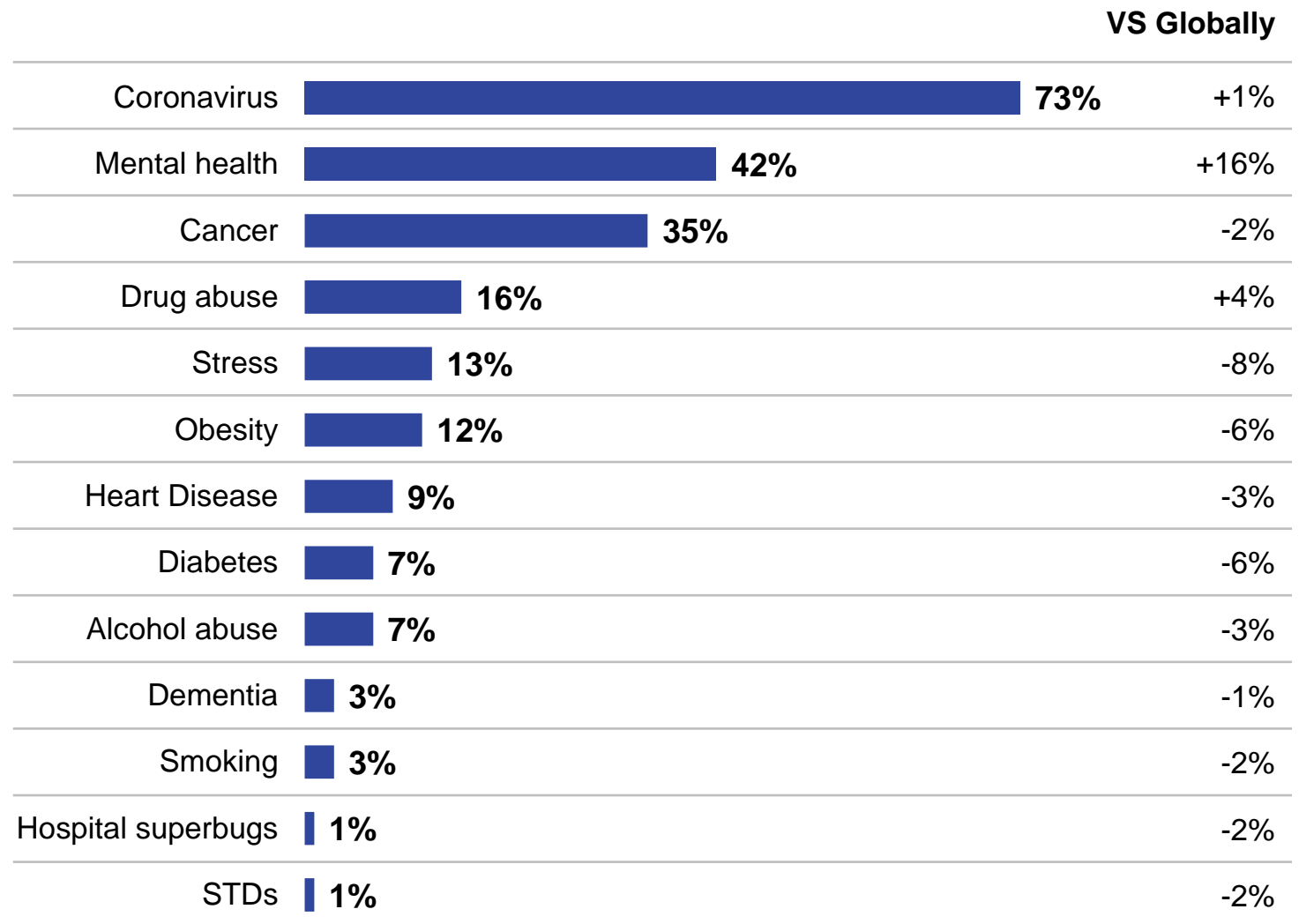


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BIGGEST HEALTH PROBLEMS

In Canada, thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

In Canada, mental health ranks second to coronavirus as the top health issue in the country from the list we tested, much higher than globally. Cancer ranks third.



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HEALTHCARE PERCEPTIONS

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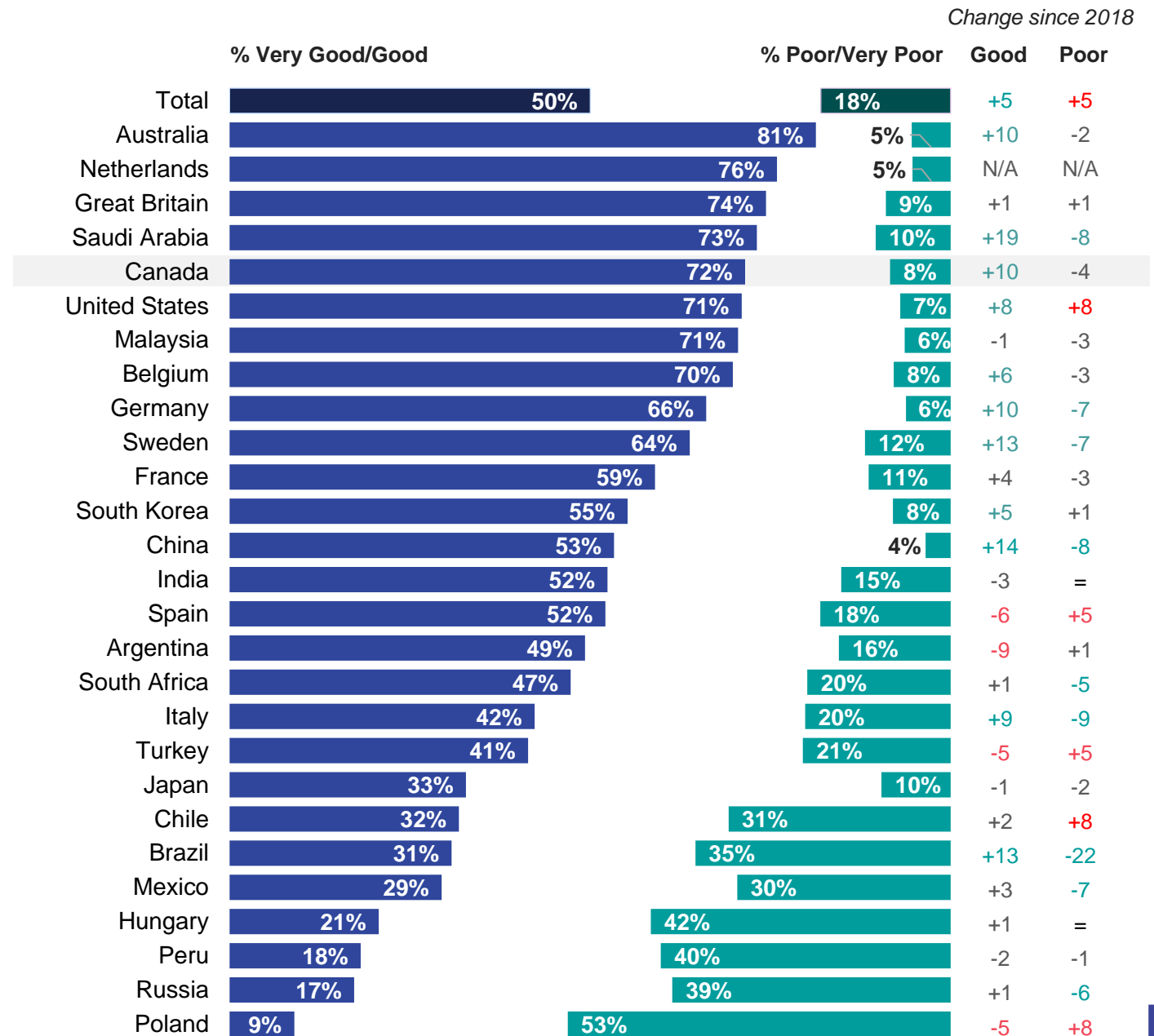
QUALITY OF HEALTHCARE

How would you rate the quality of healthcare that you and your family have access to in your country? By healthcare we include doctors, specialist physicians such as surgeons, hospitals, tests for diagnosis and drugs to treat various ailments

Canadians provide generally positive assessments of the quality of healthcare they receive. Indeed, Canada ranks 5th of the 27 countries, with ratings higher than they were in 2018.

Interestingly, while much is often made the differences between Canada and the US, Americans are as positive toward their healthcare system as Canadians are about theirs.

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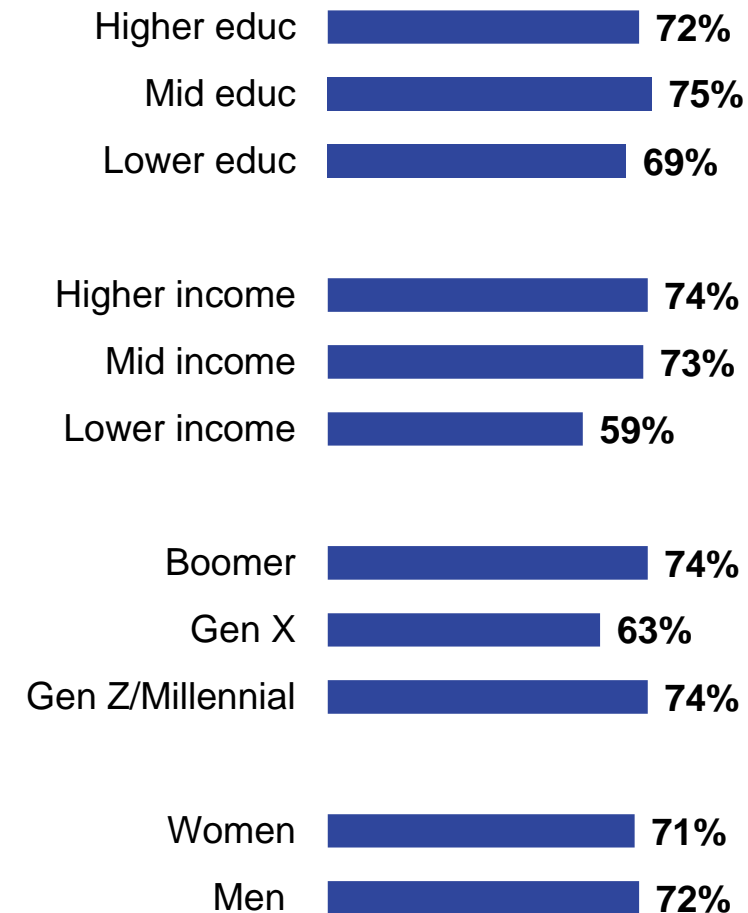
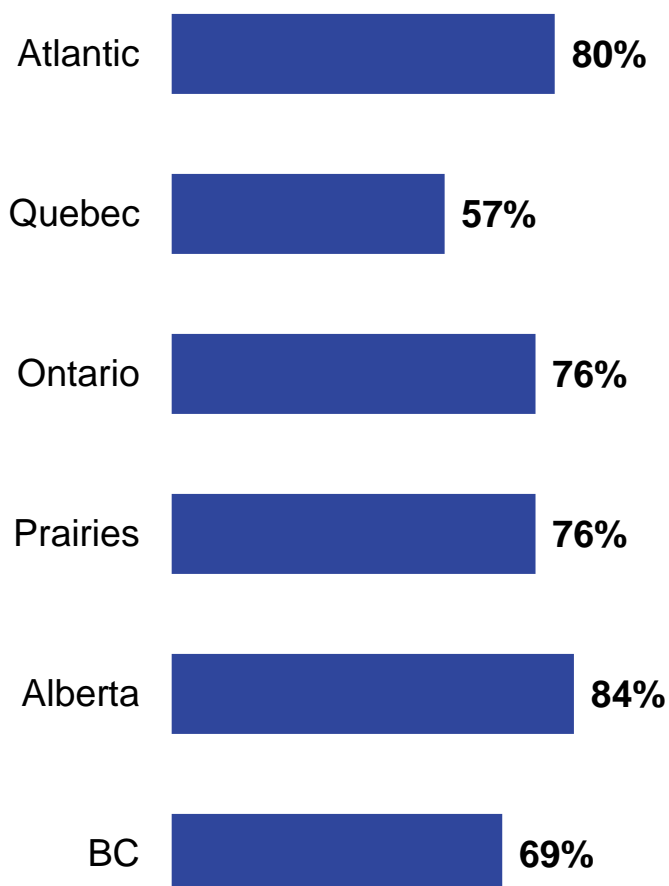
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Canadians from all walks of life are generally positive toward their healthcare system, although this tends to be higher in Alberta and Atlantic, and lower among lower education and income and Gen X.

By healthcare we include doctors, specialist physicians such as surgeons, hospitals, tests for diagnosis and drugs to treat various ailments.

% positive



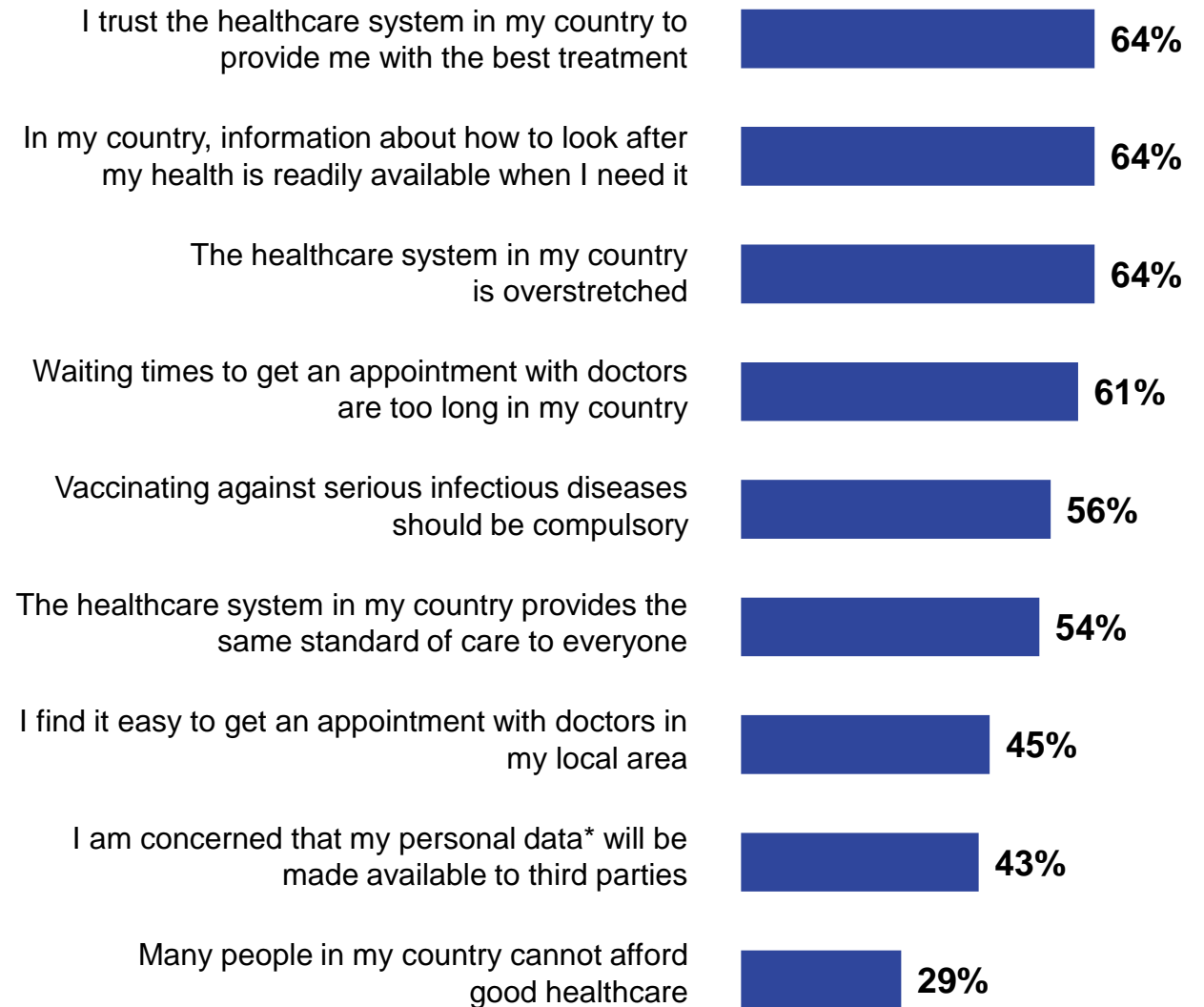
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ATTITUDES

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

Canadians are generally positive in their trust in the system and the availability of information. They are also largely of the belief that the system is overstretched and wait times are too long.

% agree

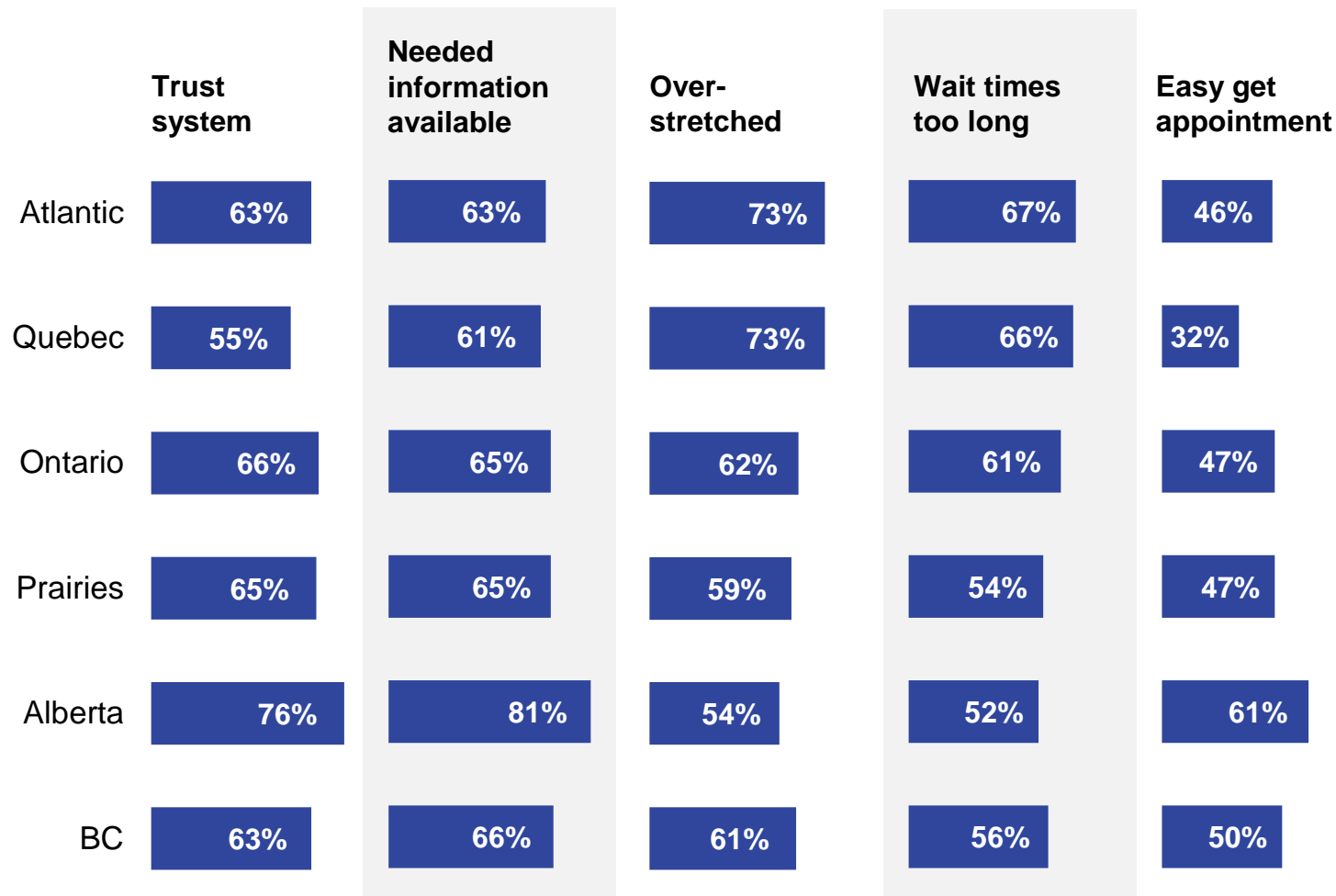


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SELECT ATTITUDES

Albertans tend to be most positive toward healthcare in their province on specific performance items, residents of Quebec less so.

% agree



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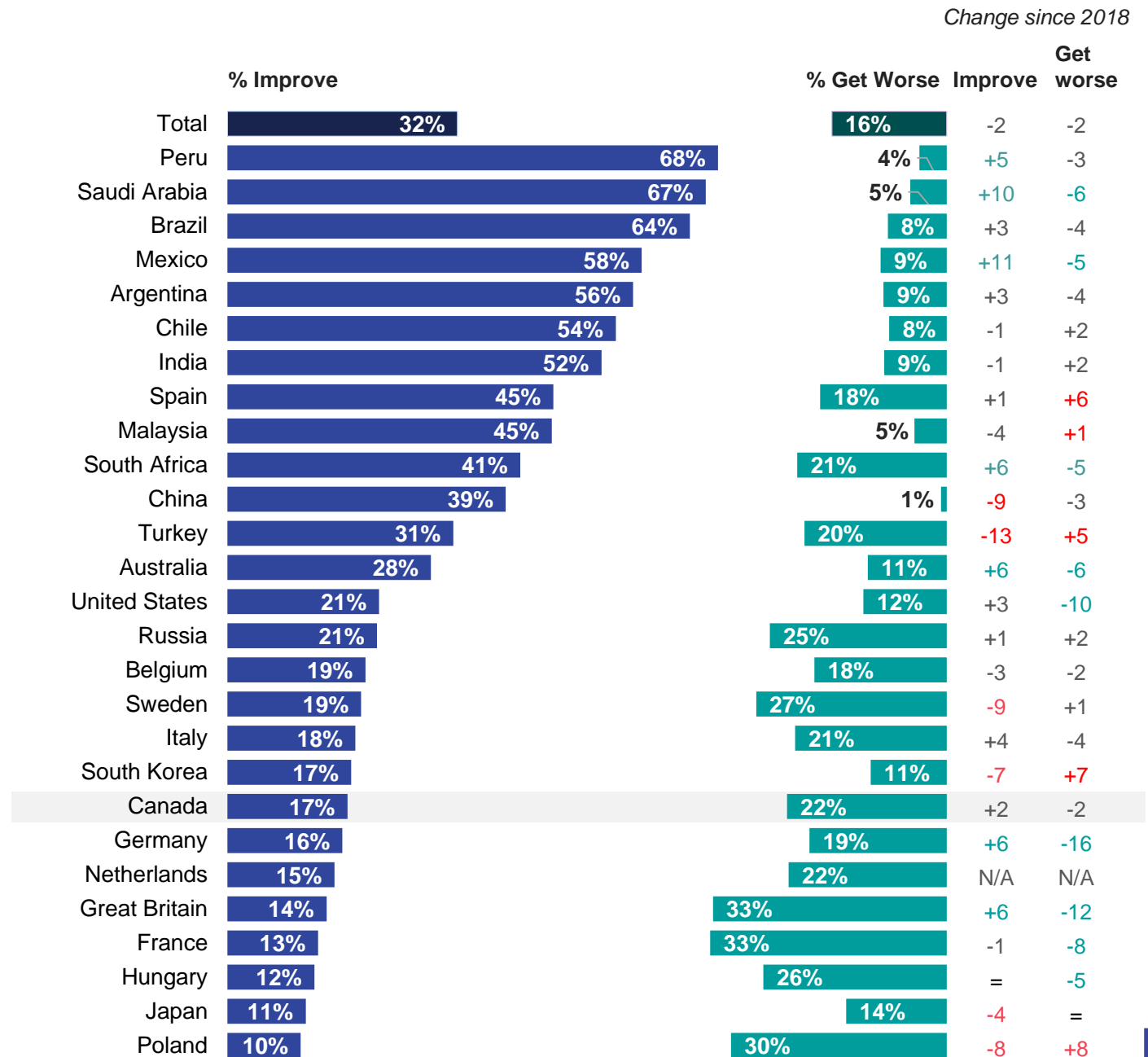
HEALTHCARE FUTURE

5

FUTURE QUALITY OF HEALTHCARE

Over the coming years, do you expect the quality of healthcare that you and your family will have access to locally will improve, stay the same, or get worse?

More Canadians think their healthcare system will deteriorate than improve in the future. But a majority think that the quality of the system will be maintained. Canadians are among the lower countries perceiving some potential improvement. But of course, Canadians are starting from a higher bar.

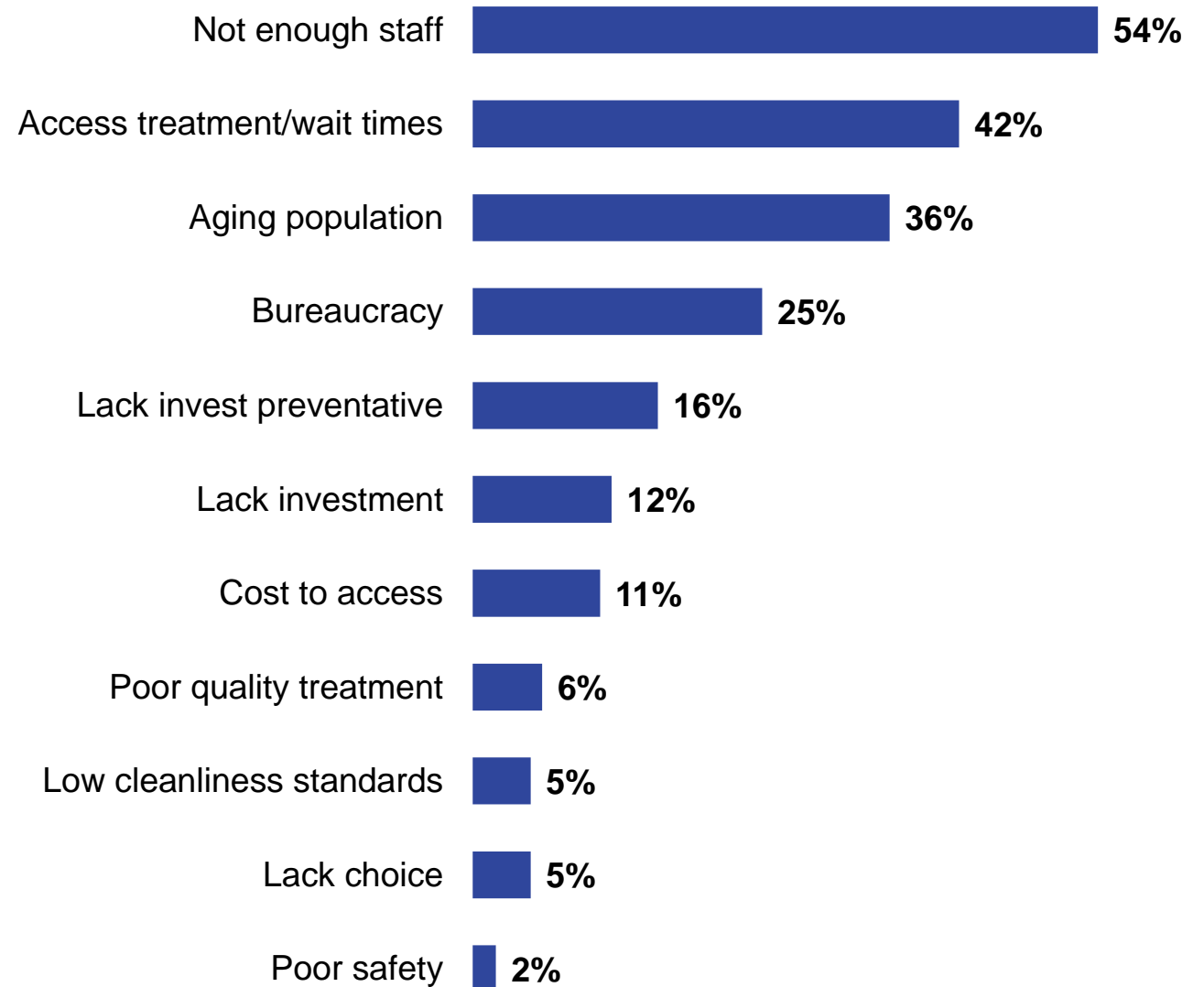


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HEALTHCARE CHALLENGES NOW

Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?

Moving forward, human resources (staffing) is the biggest challenge facing the system according to Canadians, followed by wait times, an aging population and bureaucracy. Interestingly, lack of investment or cost to access are not high on the list.



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METHODOLOGY

This 27-country Global Advisor survey was conducted between September 25th and October 9th, 2020 via the Ipsos Online Panel system among 20,009 adults aged 18-74 in Canada, Malaysia, South Africa, Turkey and the United States, and 16-74 in all 22 other countries.

The samples in Brazil, Chile, China, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more “connected” segment of these populations.

The sample consists of approximately 1000+ individuals in each of Australia, Belgium, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Mexico, Spain, Sweden, and the US, and approximately 500+ individuals in each of Argentina, Chile, Hungary, India, Malaysia, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, 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 census data.

The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of these countries’ general adult population under the age of 75.

Where results do not sum to 100 or the ‘difference’ appears to be +/- 1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of don't knows or not stated responses

The publication of these findings abides by local rules and regulations.

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ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.