

GLOBAL HEALTH SERVICE MONITOR 2021

A Global Advisor survey

October 2021

www.ipsos.com/en/global-health-service-monitor-2021

GAME CHANGERS



GLOBAL HEALTH SERVICE MONITOR

A global perspective on the major issues for personal health and healthcare systems today, including how people rate the services available to them and what they think needs to be improved.

- Our annual 30-country survey explores the public view on personal health challenges and how well-equipped healthcare systems are to deal with them. New to the survey this year are **Colombia, Singapore and Switzerland**.
- This is the second wave of this study that has taken place during the Coronavirus pandemic and, understandably, **concern about the virus is still a major issue**.
- Despite the additional strain that the pandemic has placed on healthcare systems, positive ratings and levels of trust in healthcare services have, on average, not been damaged.
- However, there is widespread recognition that the health sector faces certain challenges. A majority worldwide think their country's **healthcare system is overstretched**. Overall, people think **waiting times** and a **lack of staff** are the main challenges for health services to address.
- **Access and equality** is another issue. Many countries say that **cost** is a barrier to providing everyone with a good standard of care, and opinions vary on whether health services **treat everyone equally**.
- Looking forward, more people **expect their country's healthcare systems to improve** than worsen, but optimism is not widespread across all the countries surveyed.

HEALTH CONCERNS

1

HEALTH CONCERNS

1. Coronavirus

70%

say **Covid-19** is a top health concern facing their country today (global country average)

It is the #1 health problem in 25 of 30 countries.

*Highest in **Malaysia, Peru, Japan** and **Mexico***

Stress is the 4th concern with 22% on average.
Peru ranks first (+9 to 35%).

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2. Cancer

34%

↓ -18

point drop in **cancer** as a top health worry vs. our (pre-Covid) 2018 survey

*Highest levels of concern in **Russia, Belgium, Italy, Poland** and **Spain**.*

*The European average is **42%***

One in five (19%) say that **obesity** is a top concern. This rises to 52% in **Mexico**.

3. Mental Health

31%

↑ +5

percentage point increase in those who consider **mental health** a top health problem (2021 vs. 2020)

Mental health remains a top health issue during the pandemic.

***Sweden, Chile** and **Australia** are the countries most likely to select this.*

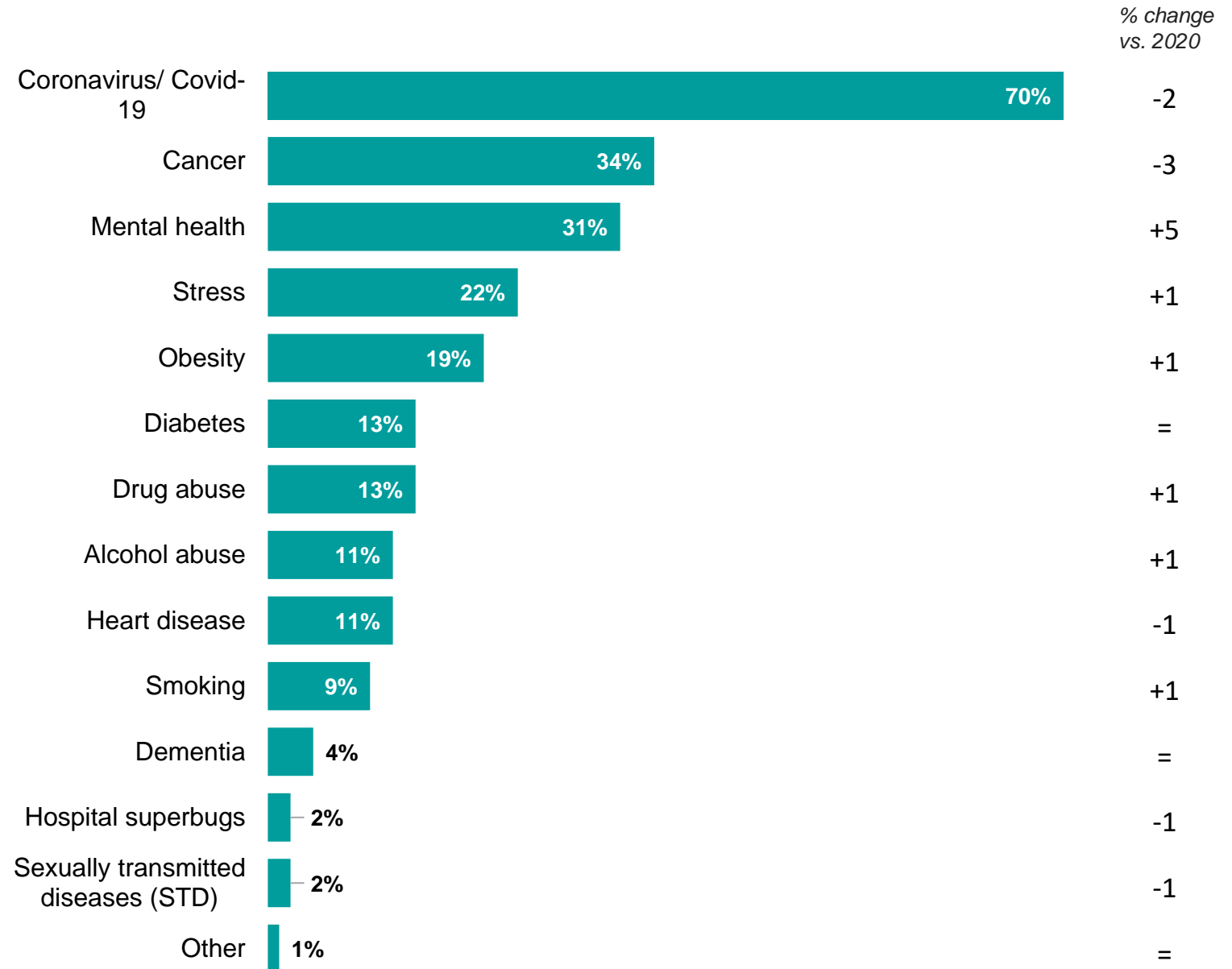
Drug abuse (13%) and **alcohol abuse** (11%) feature as health problems to a lesser extent.

HEALTH PROBLEMS: GLOBAL OVERVIEW

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

Covid-19 is the top health problem facing the world today, with 70% of our respondents across 30 countries selecting this. This is little changed from the 72% seen in 2020.

The biggest change in the perceived importance of any health problem since last year is a 5-point increase for mental health, which puts it only 3 points behind concern about cancer.



Base: 21,513 online adults in 30 countries, August 20th – September 3rd 2021.

Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

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CORONAVIRUS

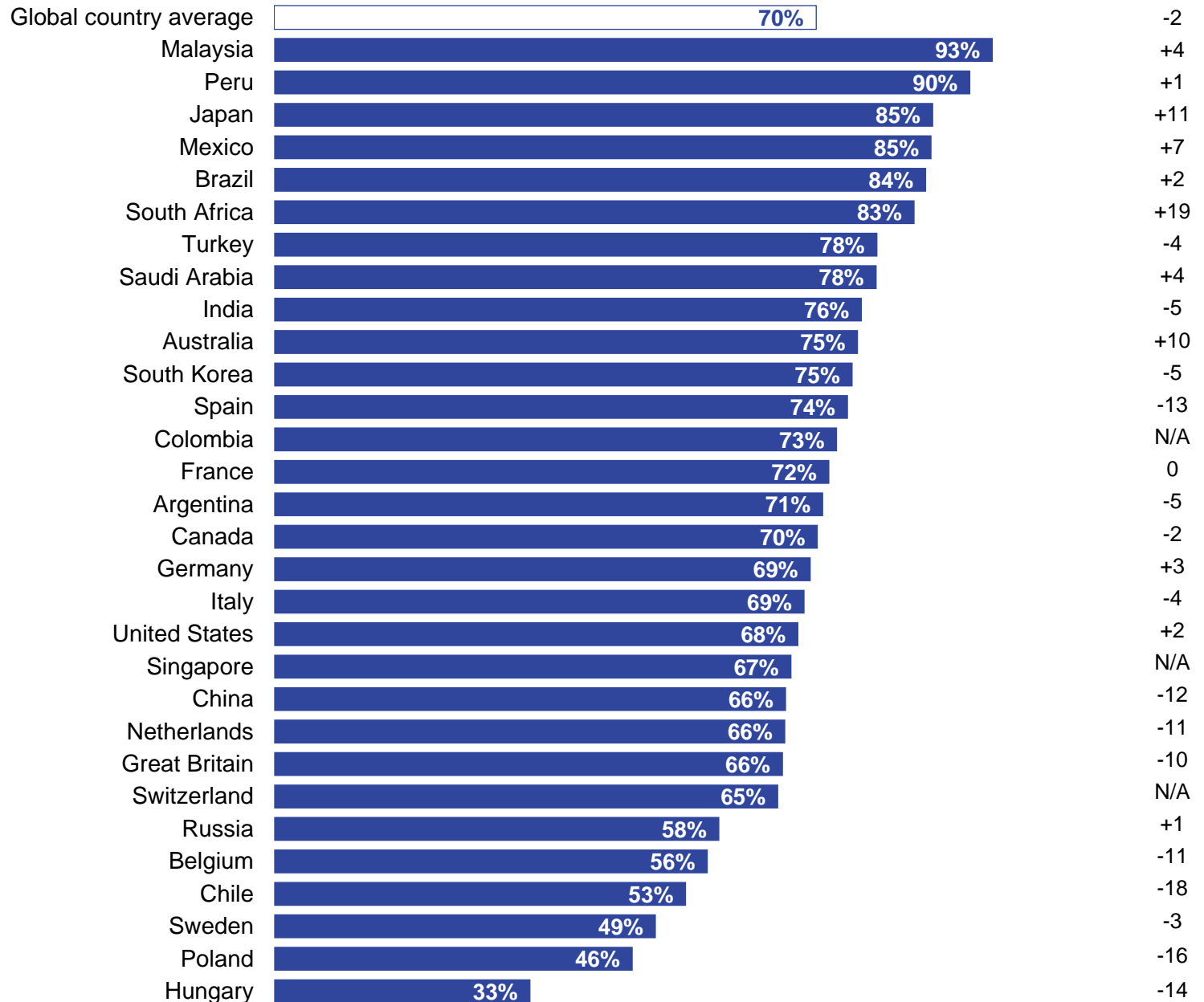
Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Coronavirus is by far the greatest health concern today, according to the global public.

In 25 of the 30 countries, Coronavirus is seen as the biggest health problem.

Concern is highest in Malaysia (93%) and Peru (90%) - the same top two as last year.

But there have been significant changes in perceptions across countries with large increase in South Africa (+19), Japan (+11) and Australia (+10) and decreases in Chile (-18), Poland (-16) and Hungary (-14).



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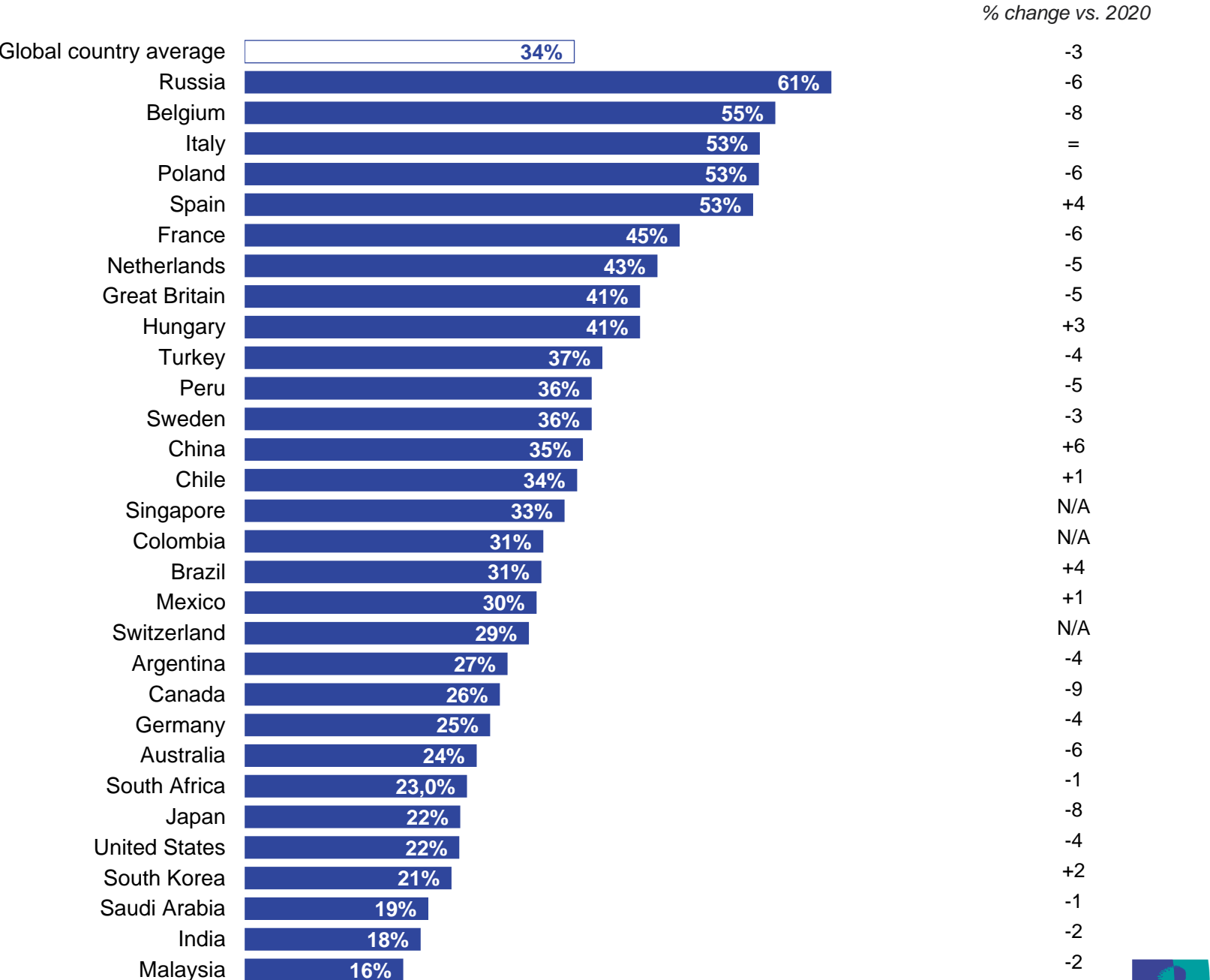
CANCER

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

One-third of respondents say cancer is one of the top health problems. The 34% recorded today is down from 37% in 2020 and 18 points lower than the 52% recorded pre-Covid, in 2018.

The average for Europe is higher than other regions, at 45%.

Older generations are more concerned about the health risks posed by cancer. We see 39% of those aged 50-74 selecting this compared to 28% of those under 35.



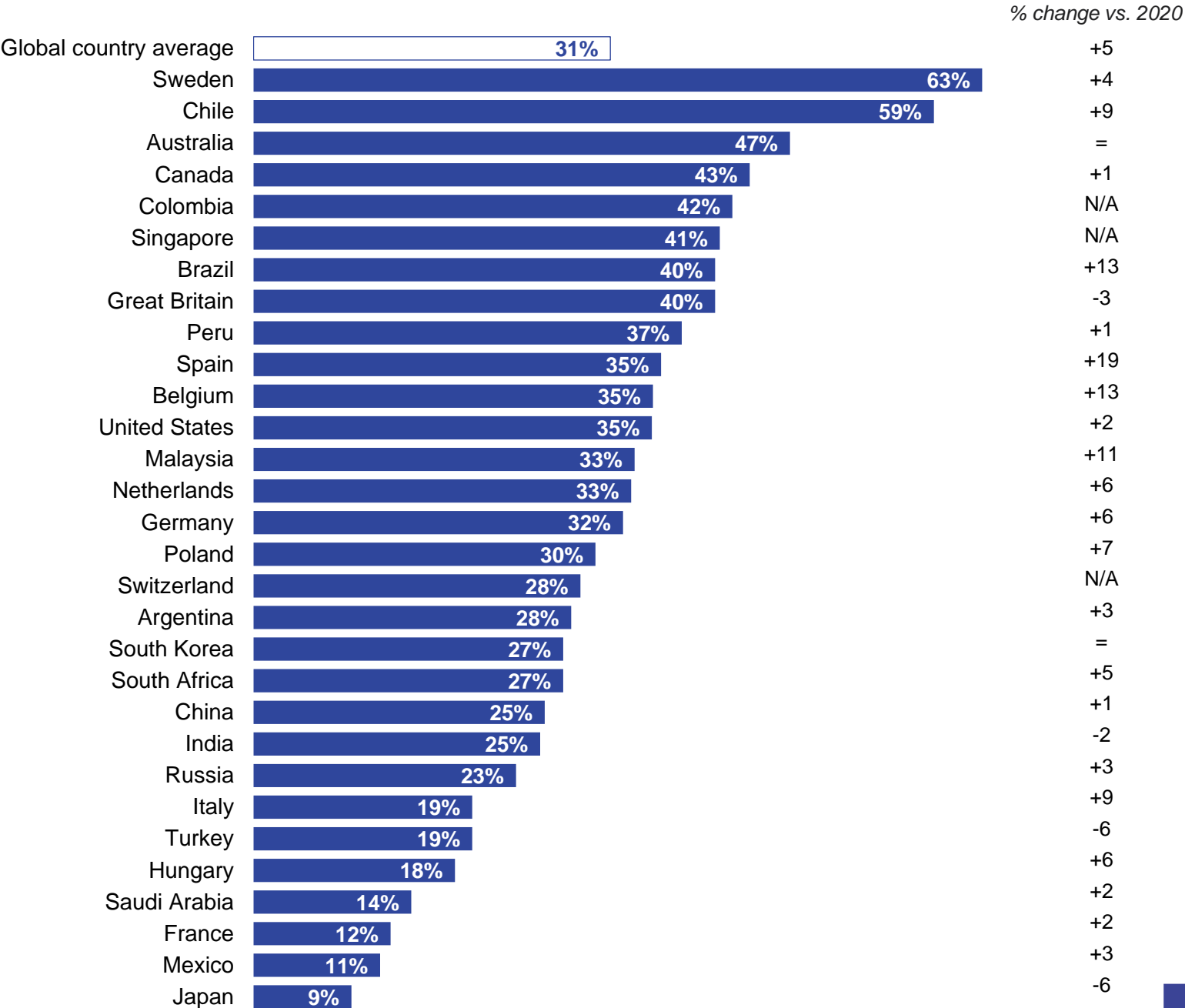
MENTAL HEALTH

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

Three in 10 (31%) across 30 countries say mental health is one of the top health problems facing people their country today. This is up 5 percentage points from 2020.

It is considered the number one health problem in Chile and Sweden. Concern has increased most since last year in Spain (+19), Belgium (+13), and Brazil (also +13).

Women are also more likely to select mental health as a top health concern (36% vs. 26% of men).



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STRESS

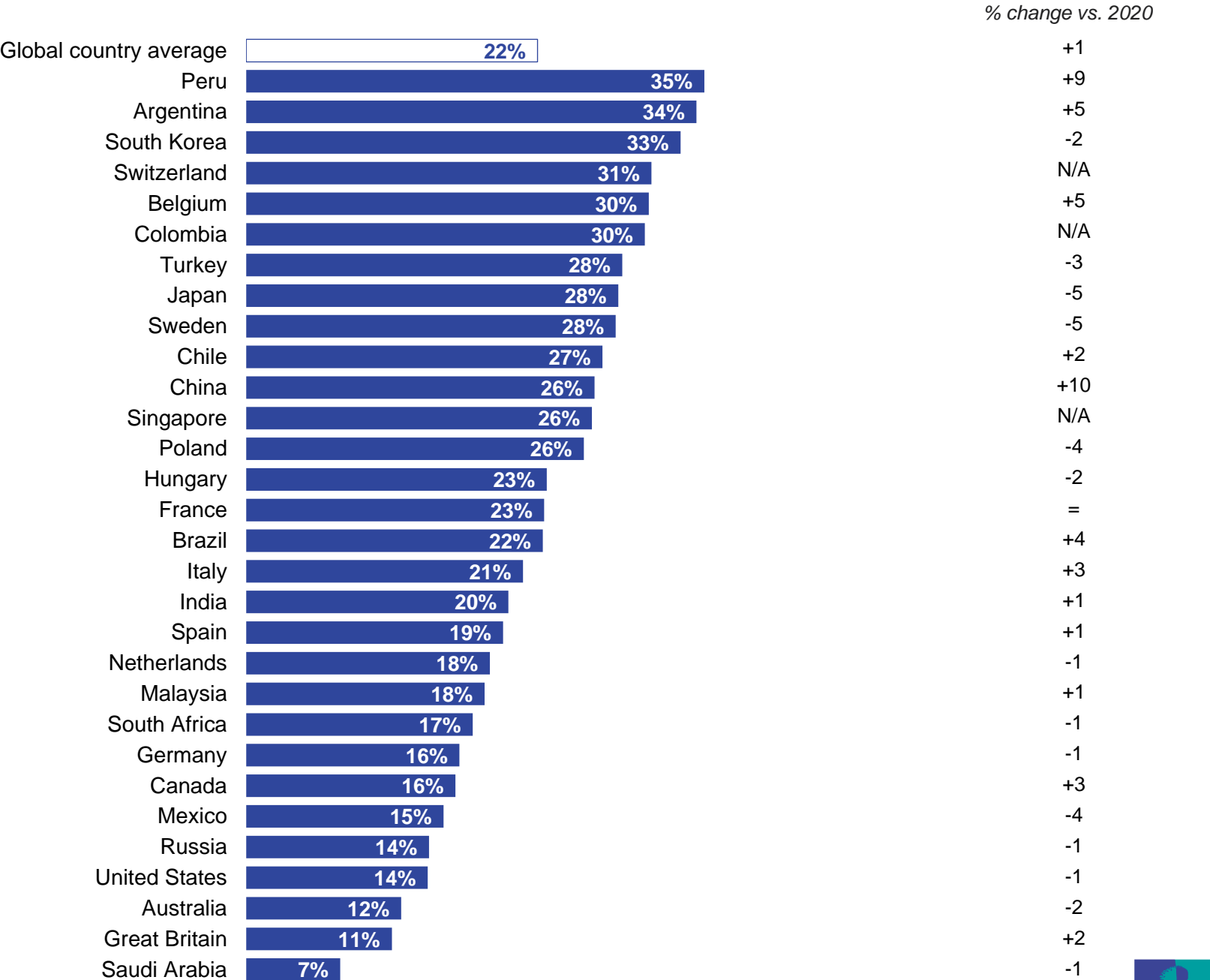
Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

One in five globally say that stress is a top health issue (22%).


One-third or more of respondents in Peru, Argentina and South Korea consider stress one of the biggest health problems facing their country today.

Japan and Sweden have fallen from the top three with 5-point decreases in each.

Overall, stress is considered a more serious health problem by under-50s around the world.



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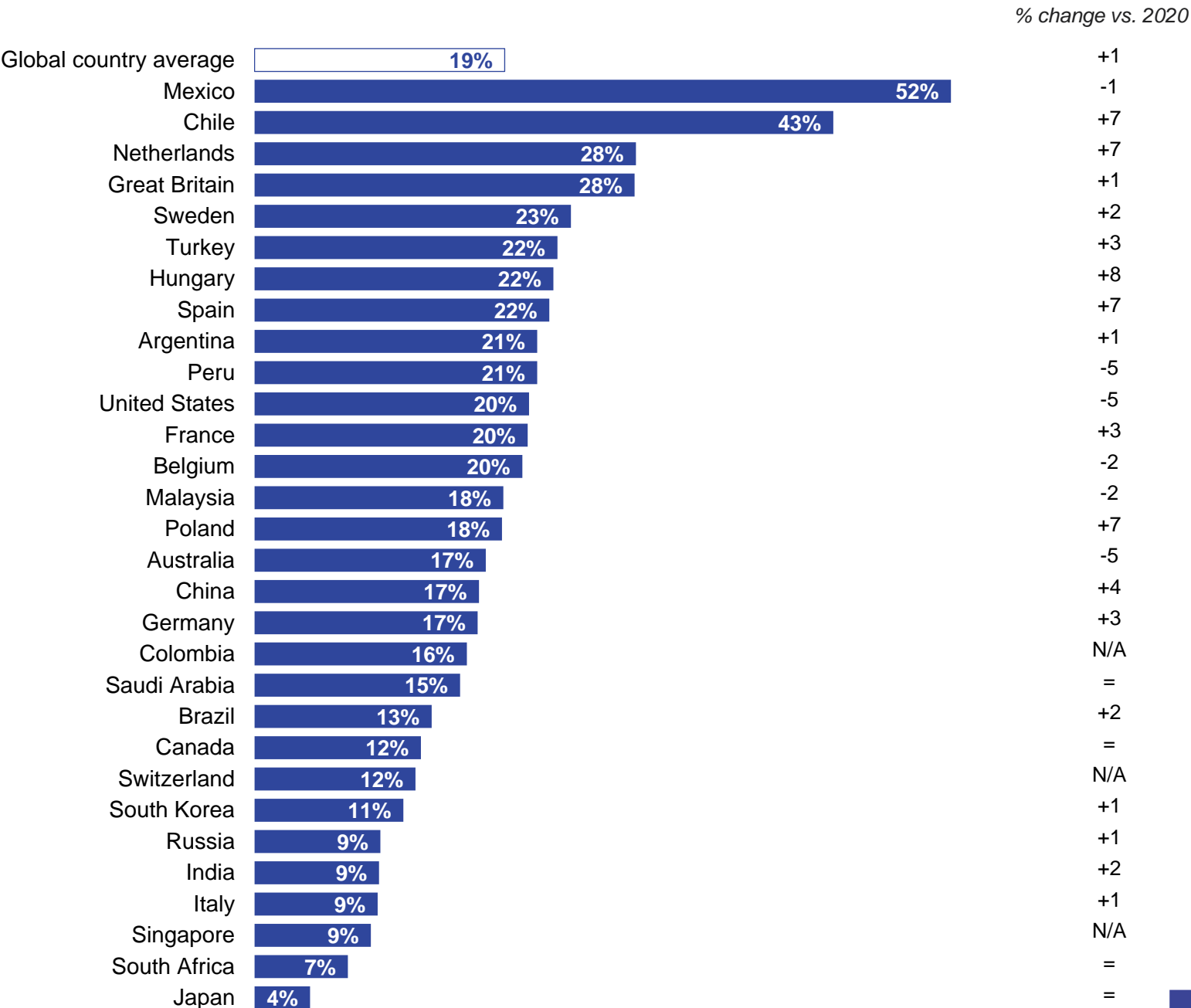


OBESITY

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

Mexico and Chile are the countries most concerned about the health problem of obesity. Since 2020, levels have remained stable in Mexico but are up 7 points in Chile.

Overall concern about obesity has fallen from 33% in 2018, perhaps due to the Coronavirus pandemic drawing focus away from other health problems.



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HEALTHCARE PERCEPTIONS

2

VIEWS OF HEALTHCARE SERVICES

53% 

on average say their country's healthcare services are "good"

this ranges from:

79% in Singapore

to 12% in Poland

Hungary
Great Britain
France



most likely to expect healthcare in their country to get worse in the future.



62%

think vaccinations against infectious diseases should be compulsory



Since 2020, there is greater agreement that health systems provide equal care to everyone in Spain and Sweden

+10

85%

in Great Britain say the system is overstretched

vs. 56% global country average

Nine in 10

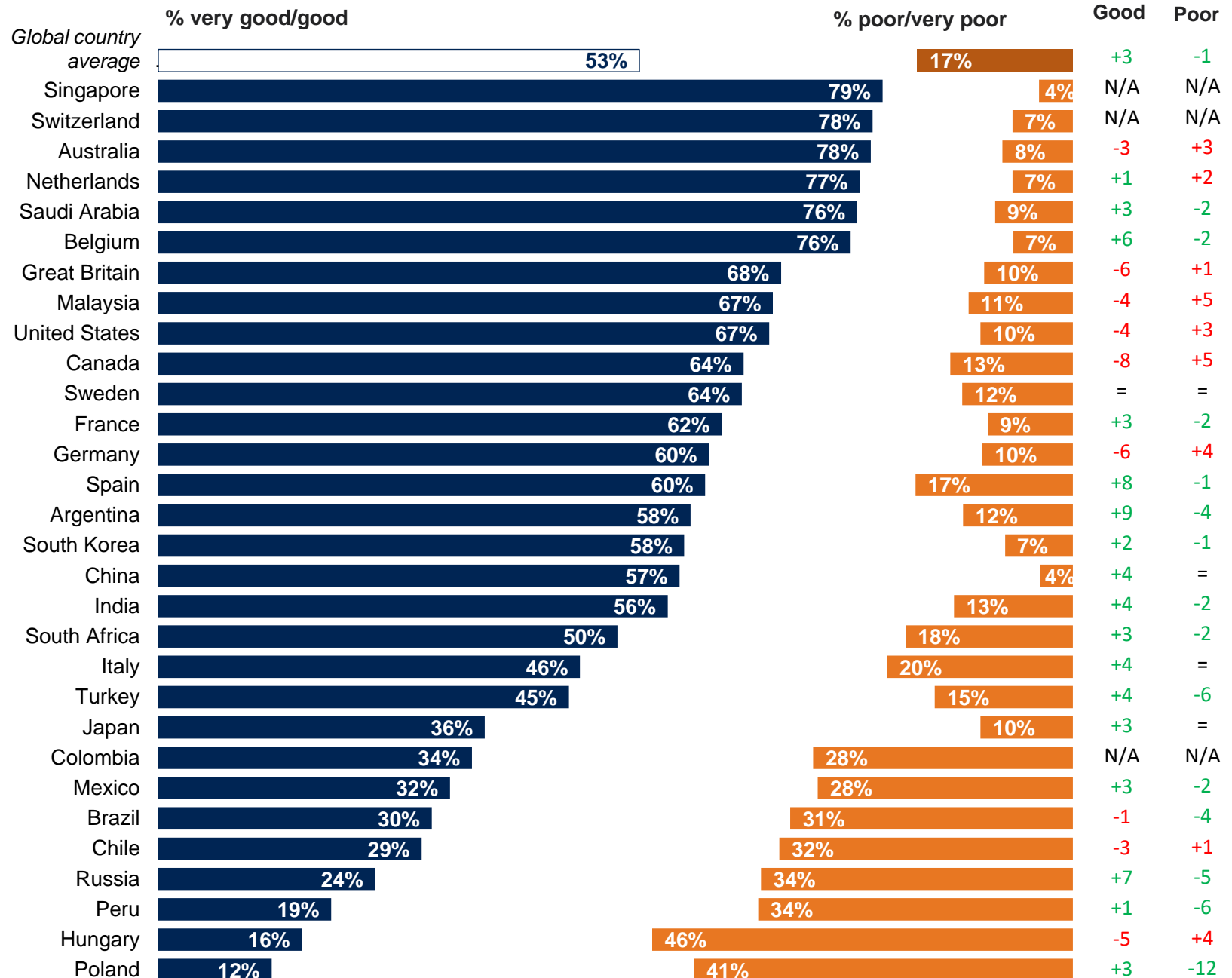


in Brazil say that most people in their country cannot afford good healthcare

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



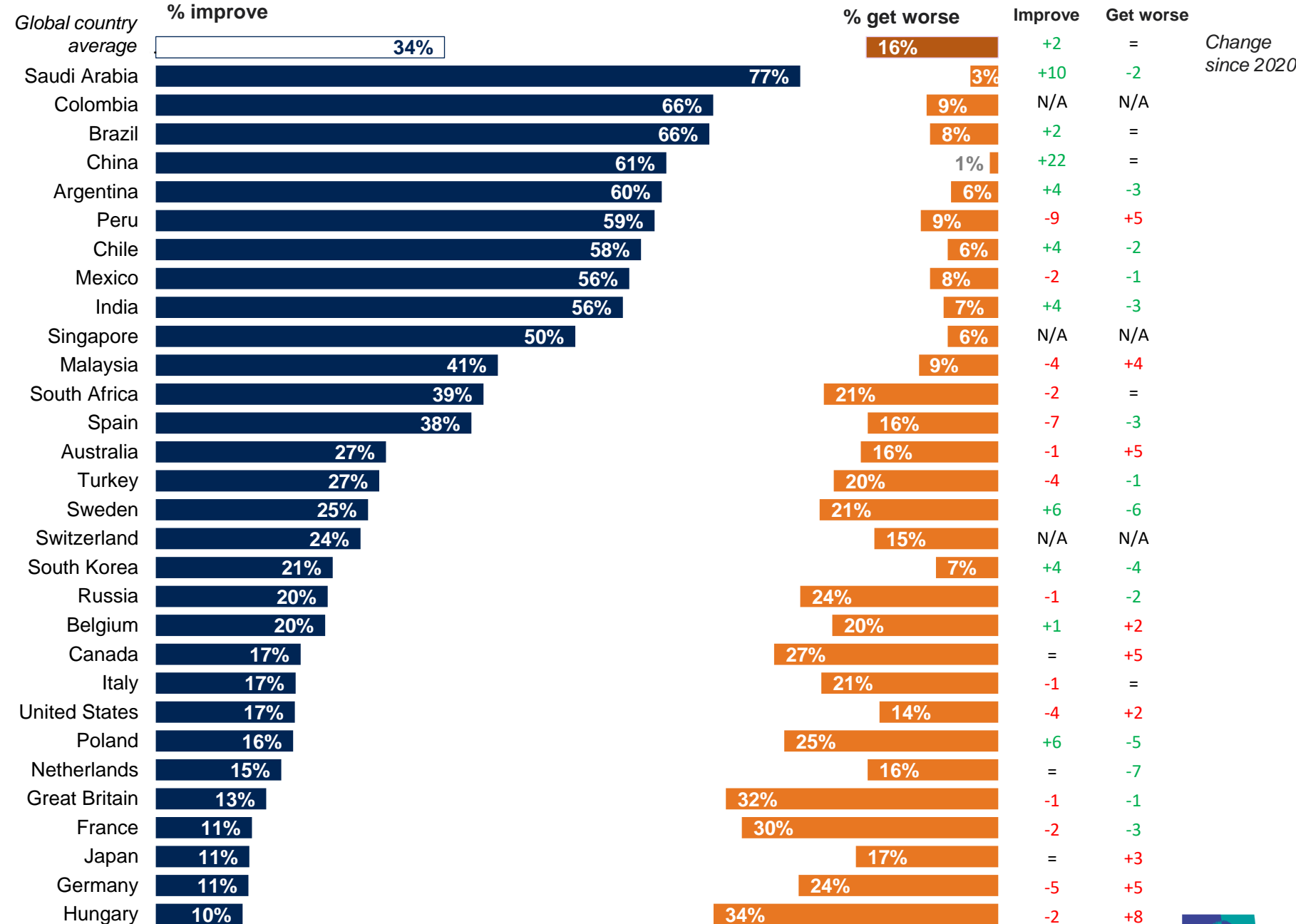
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QUALITY OF HEALTHCARE IN THE FUTURE

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?



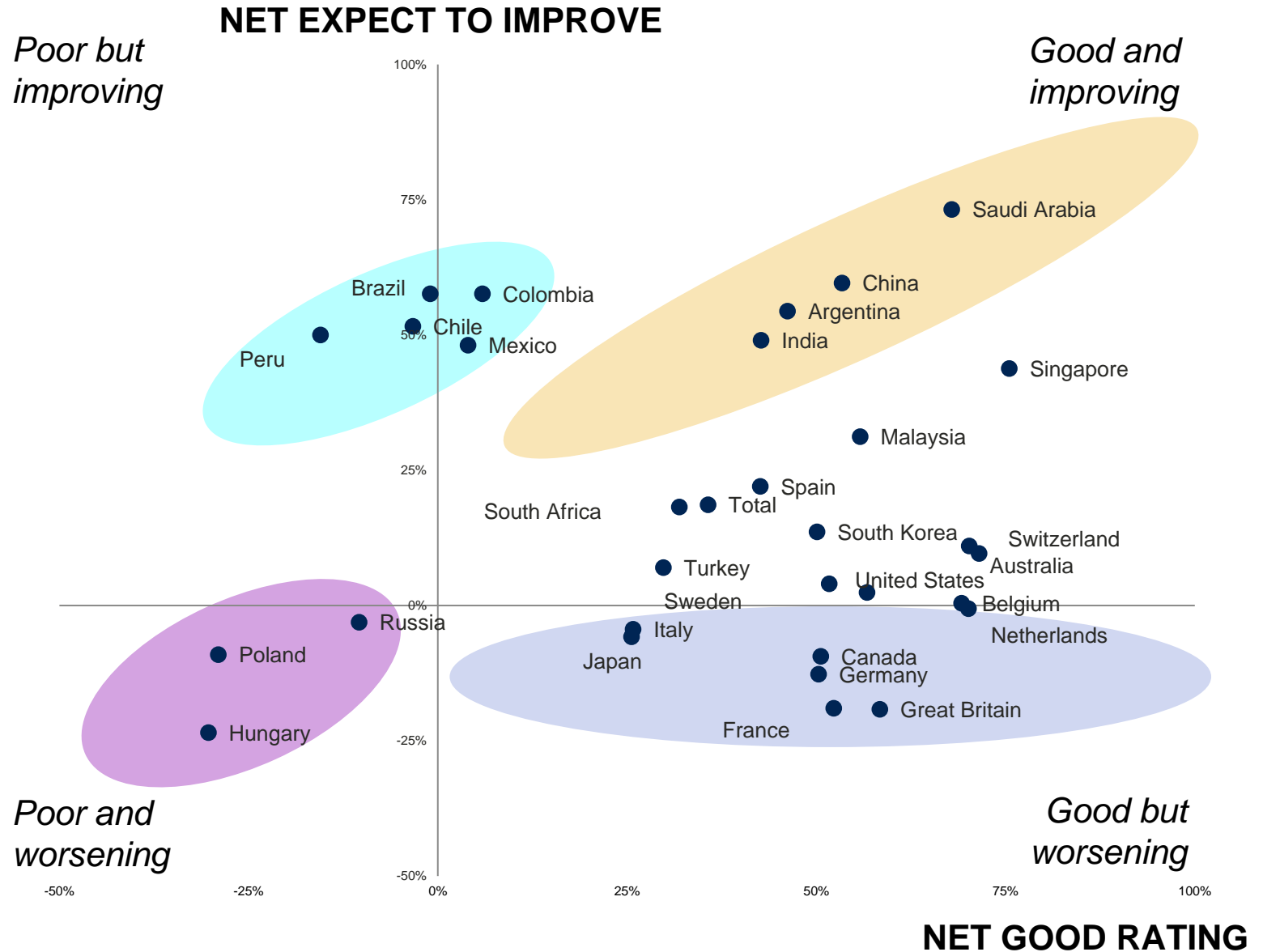
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RATINGS VS. EXPECTATIONS FOR HEALTHCARE

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?

This mapping of how the public rates their country's health services and their expectations of whether they expect this get better or worse in the future along the axes of good/poor and improving/worsening shows distinct clusters of 'poor but improving', 'poor and worsening', 'good and improving', and 'good but worsening'.



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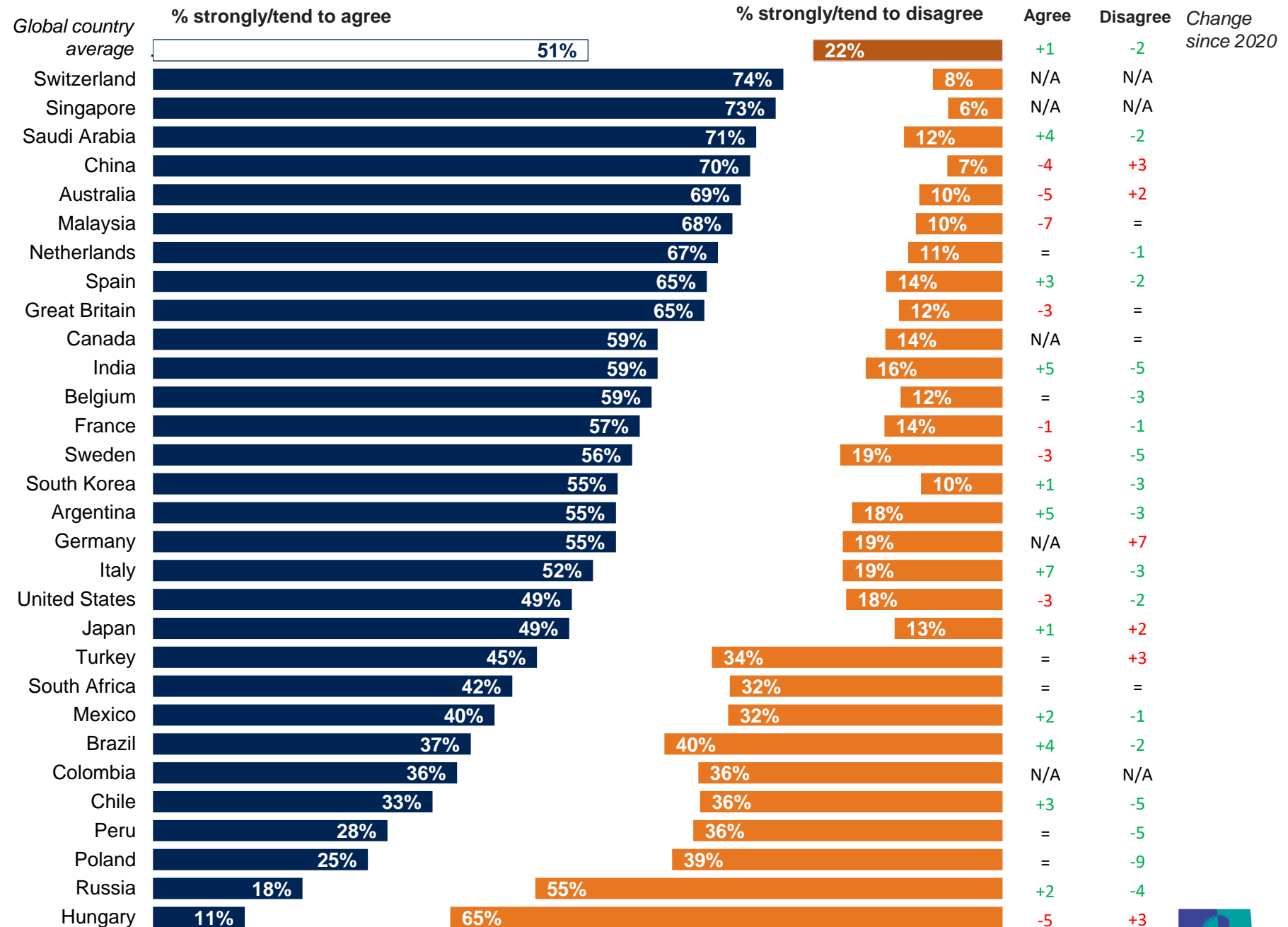
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TRUST IN HEALTHCARE

I trust the healthcare system in my country to provide me with the best treatment.

To what extent do you agree or disagree with this statement?



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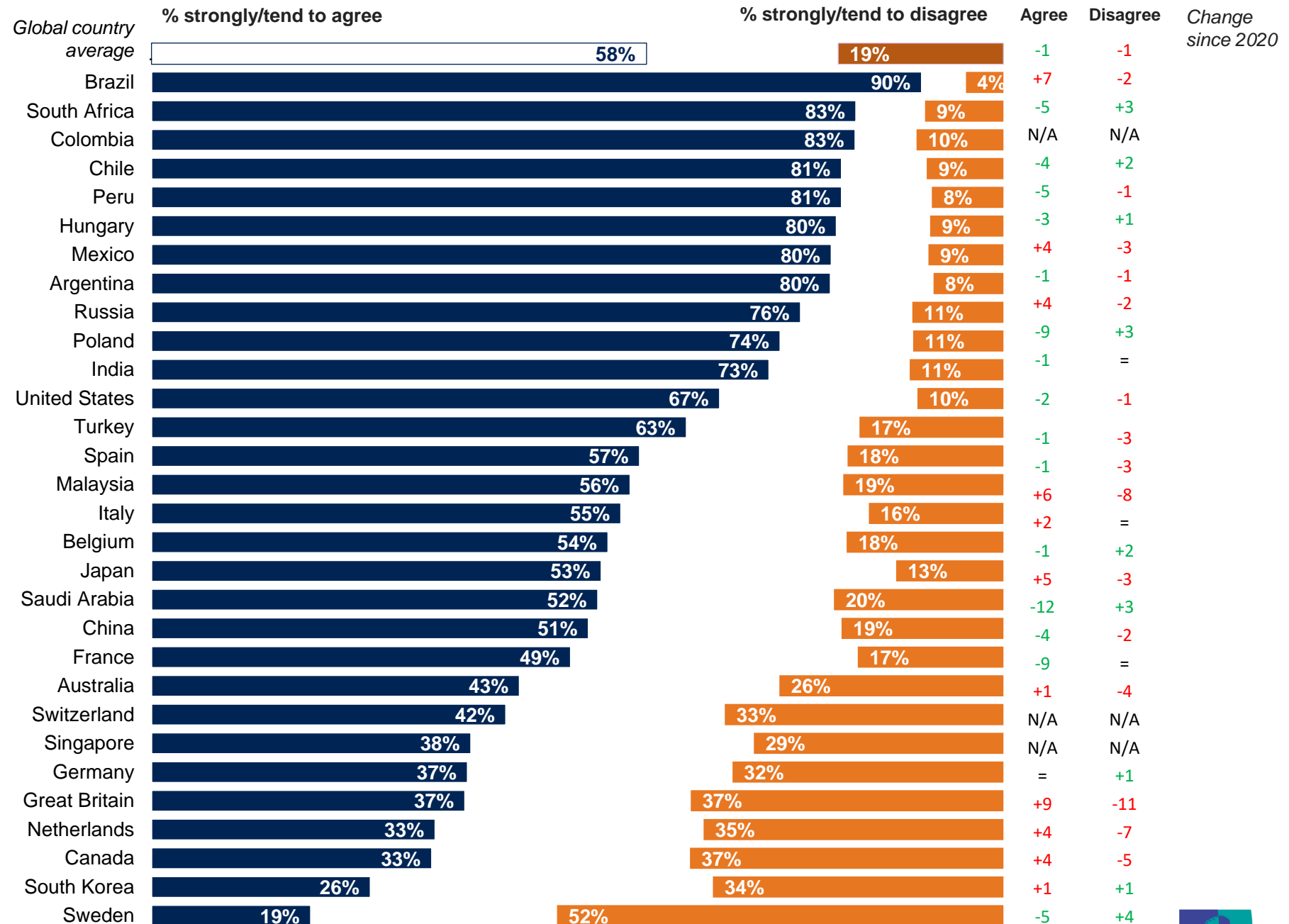
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COST OF HEALTHCARE

Many people in my country cannot afford good healthcare.

To what extent do you agree or disagree with this statement?



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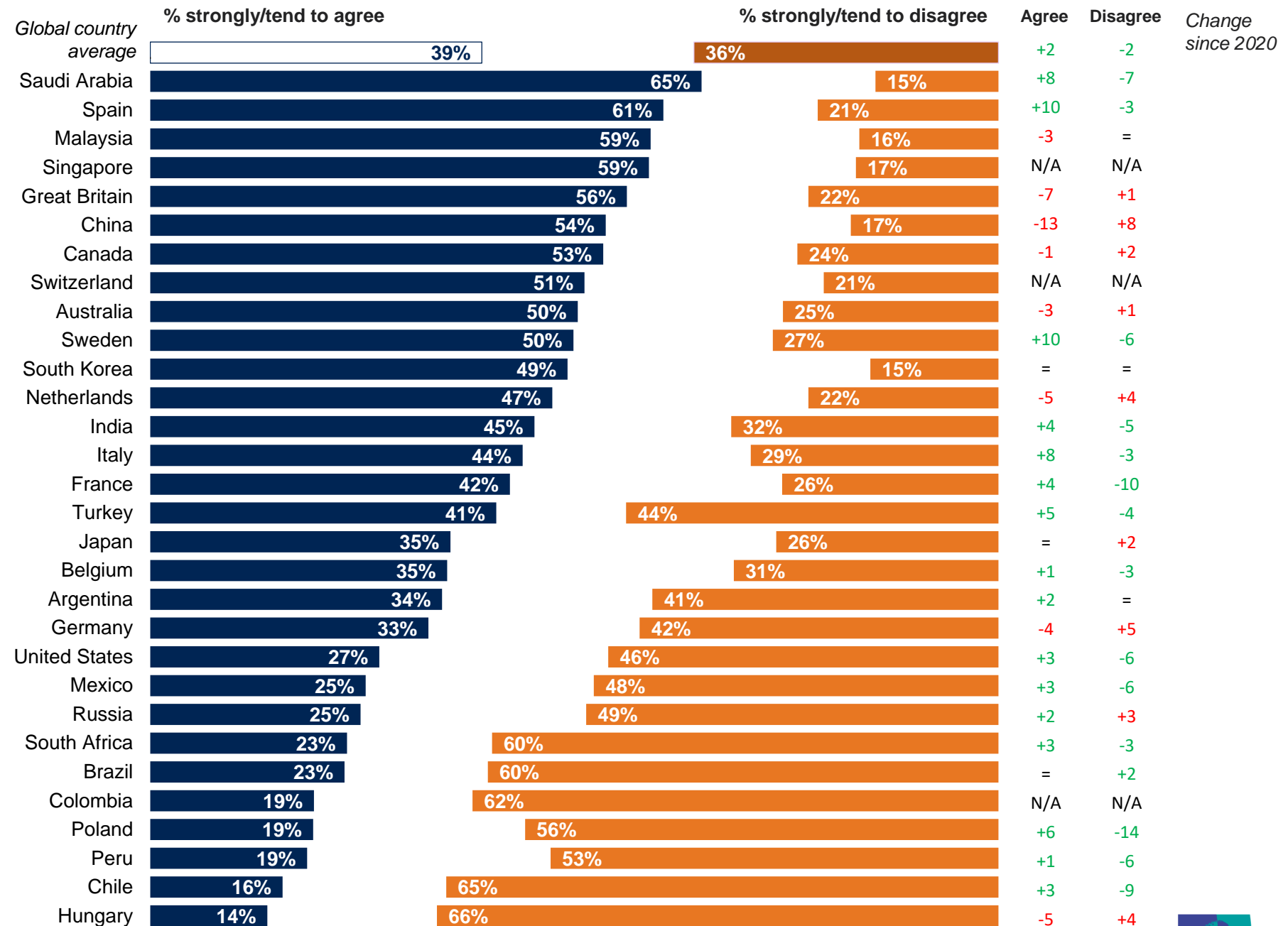
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EQUALITY OF CARE

The healthcare system in my country provides the same standard of care to everyone.

To what extent do you agree or disagree with this statement?



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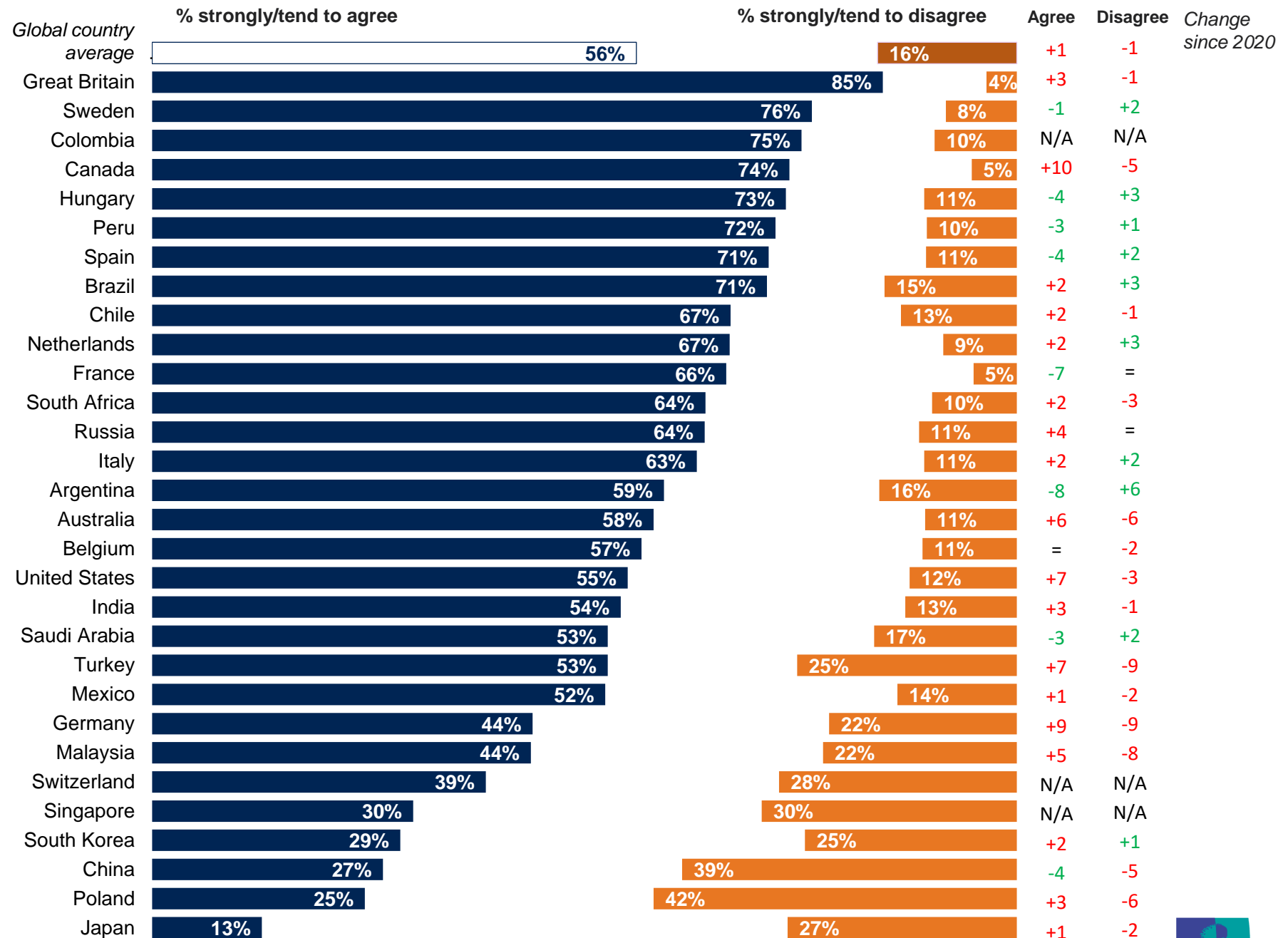
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HEALTHCARE CAPACITY

The healthcare system in my country is overstretched.

To what extent do you agree or disagree with this statement?



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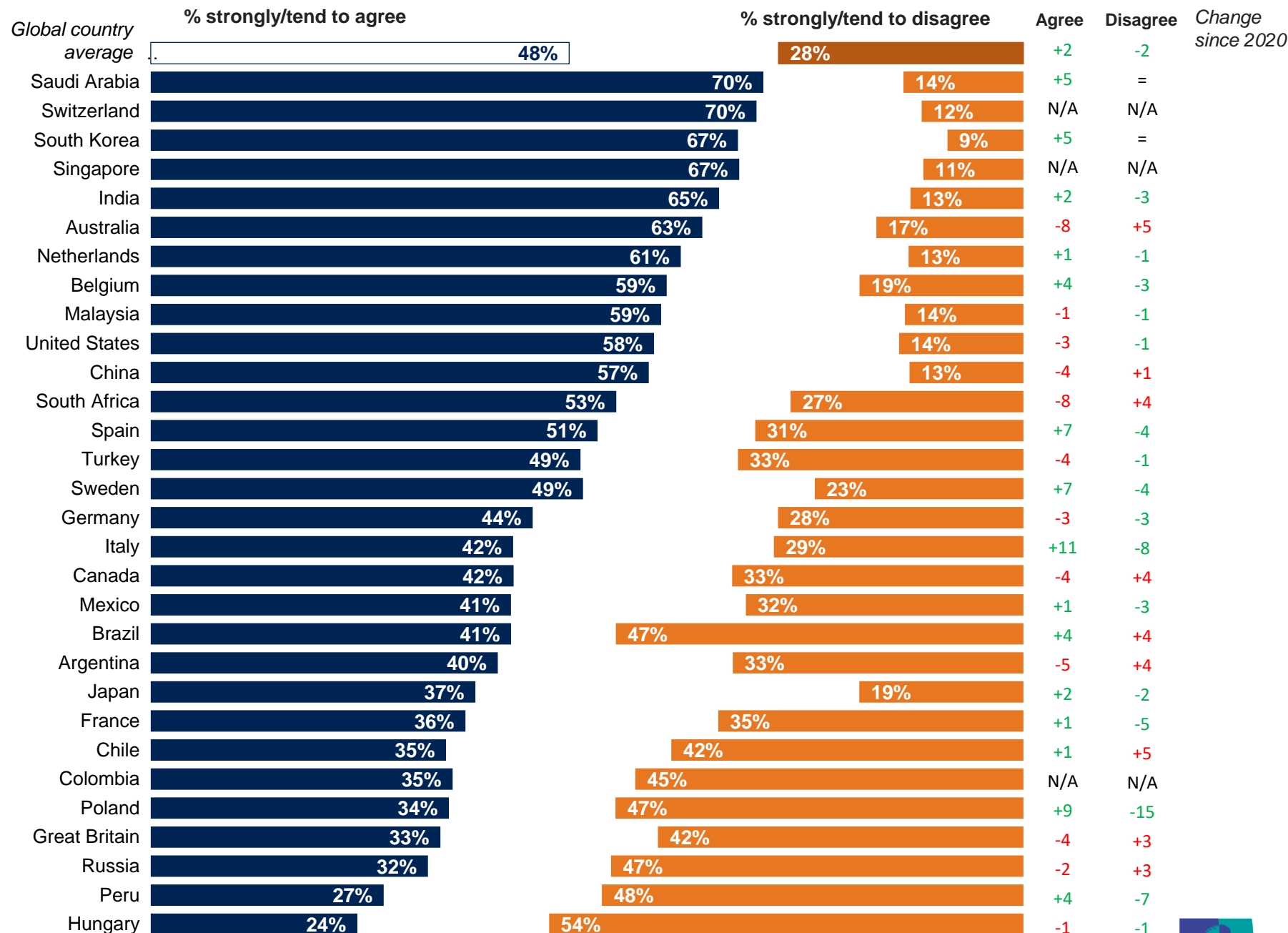
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GETTING AN APPOINTMENT

I find it easy to get an appointment with doctors in my local area.

To what extent do you agree or disagree with this statement?



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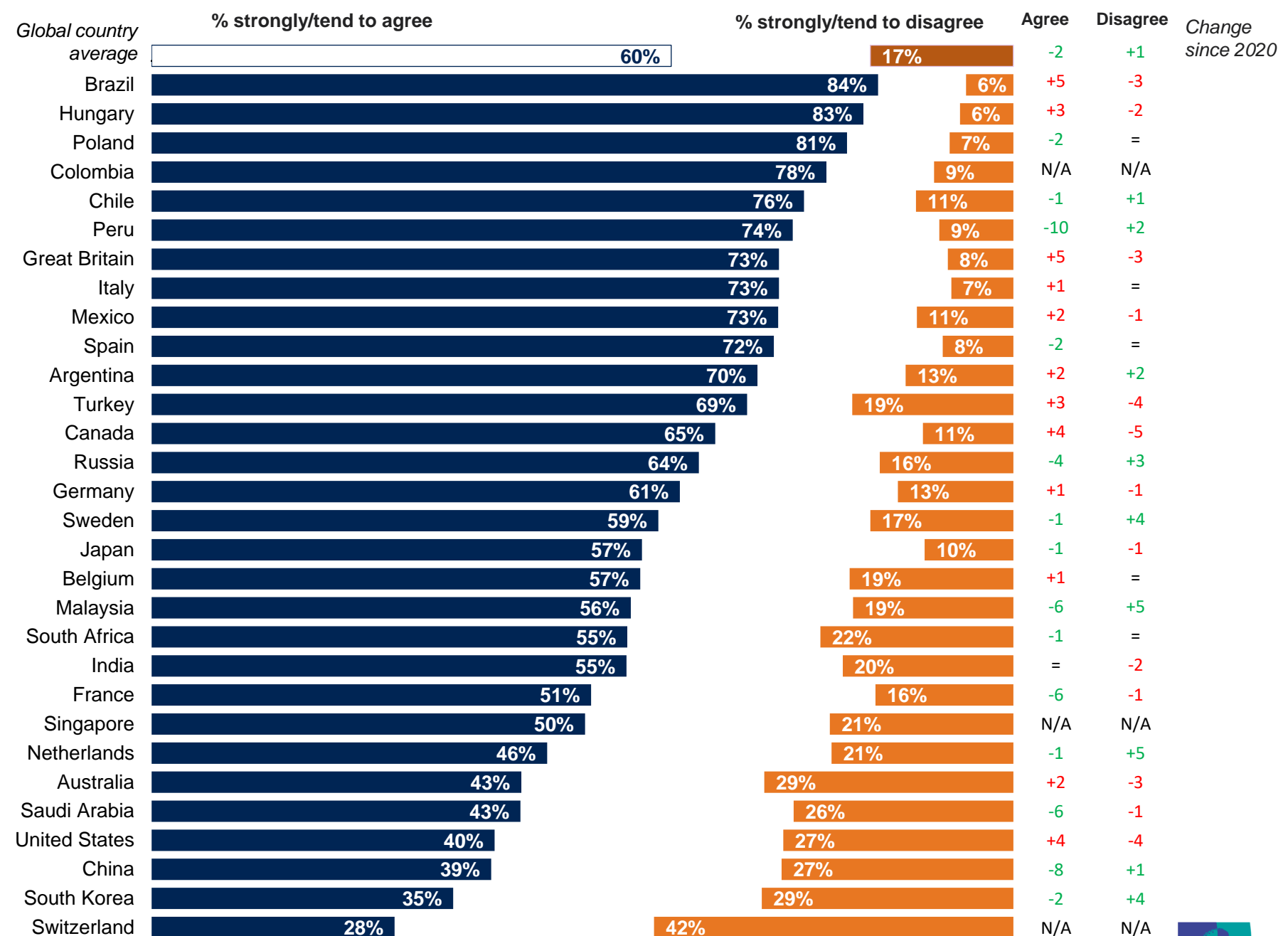
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WAITING TIMES

Waiting times to get an appointment with doctors are too long in my country.

To what extent do you agree or disagree with this statement?



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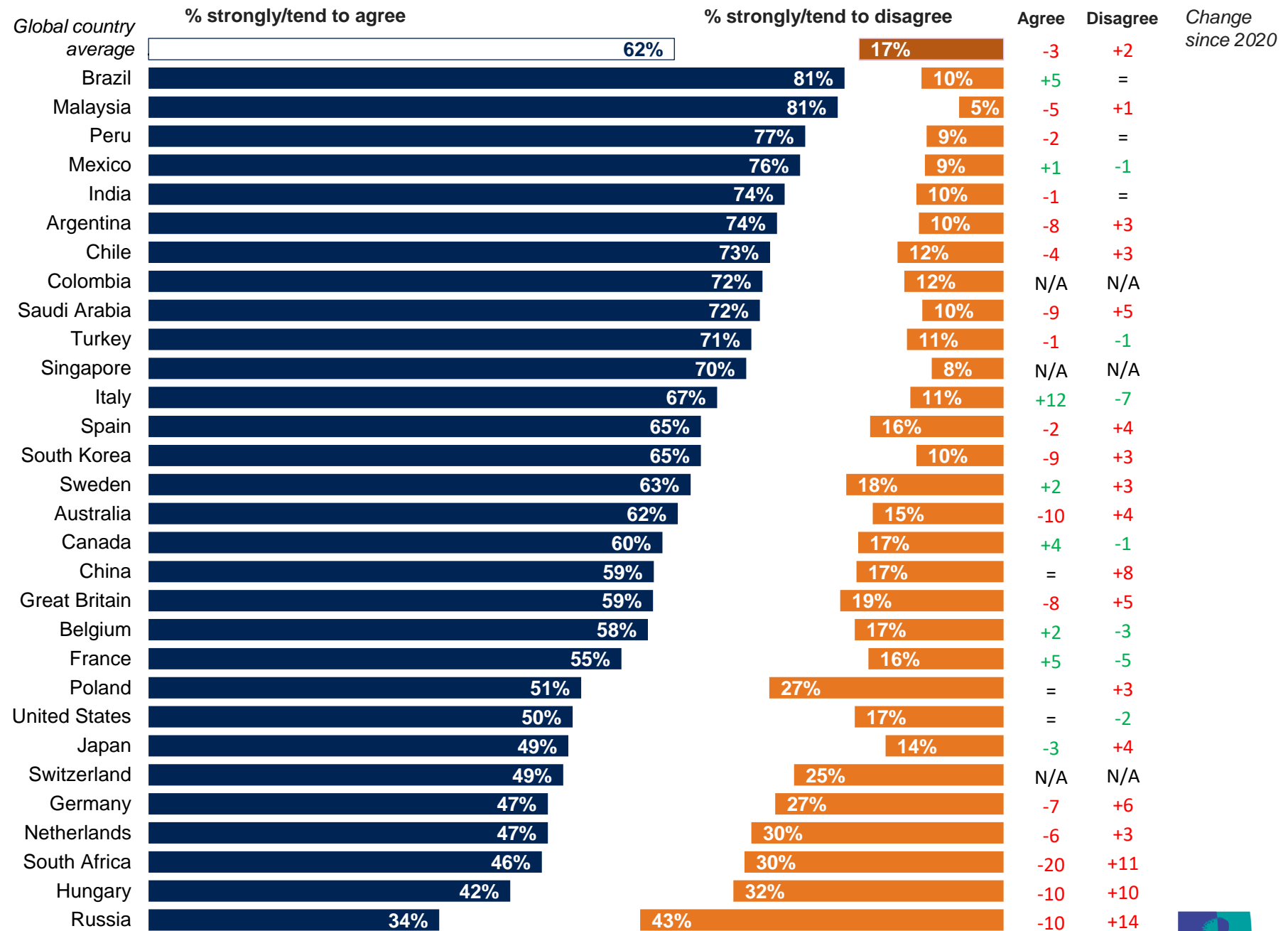
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COMPULSORY VACCINATIONS

Vaccinating against serious infectious diseases should be compulsory.

To what extent do you agree or disagree with this statement?



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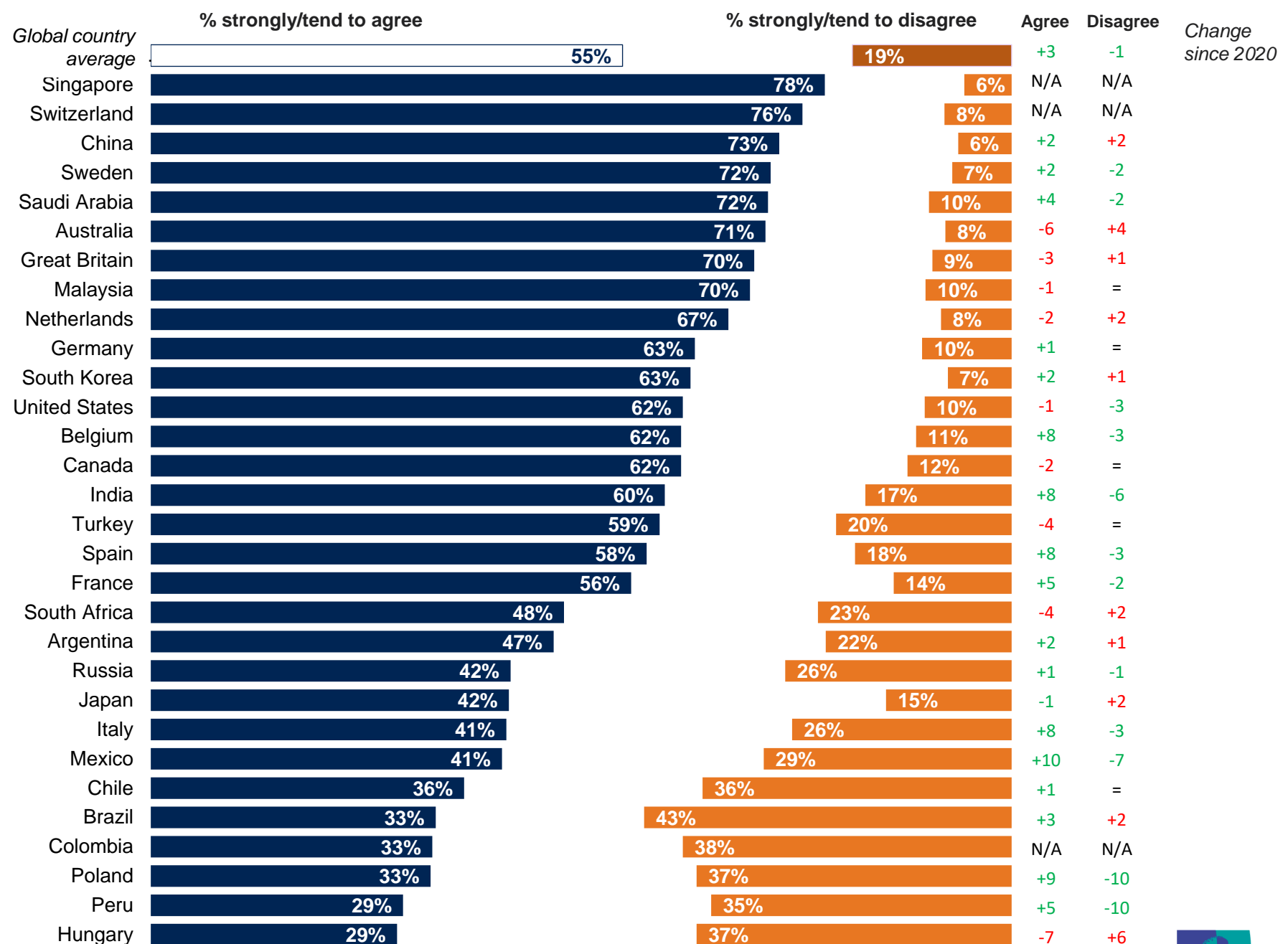
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HEALTH SERVICE INFORMATION

In my country, information about healthcare services is readily available when I need it.

To what extent do you agree or disagree with this statement?



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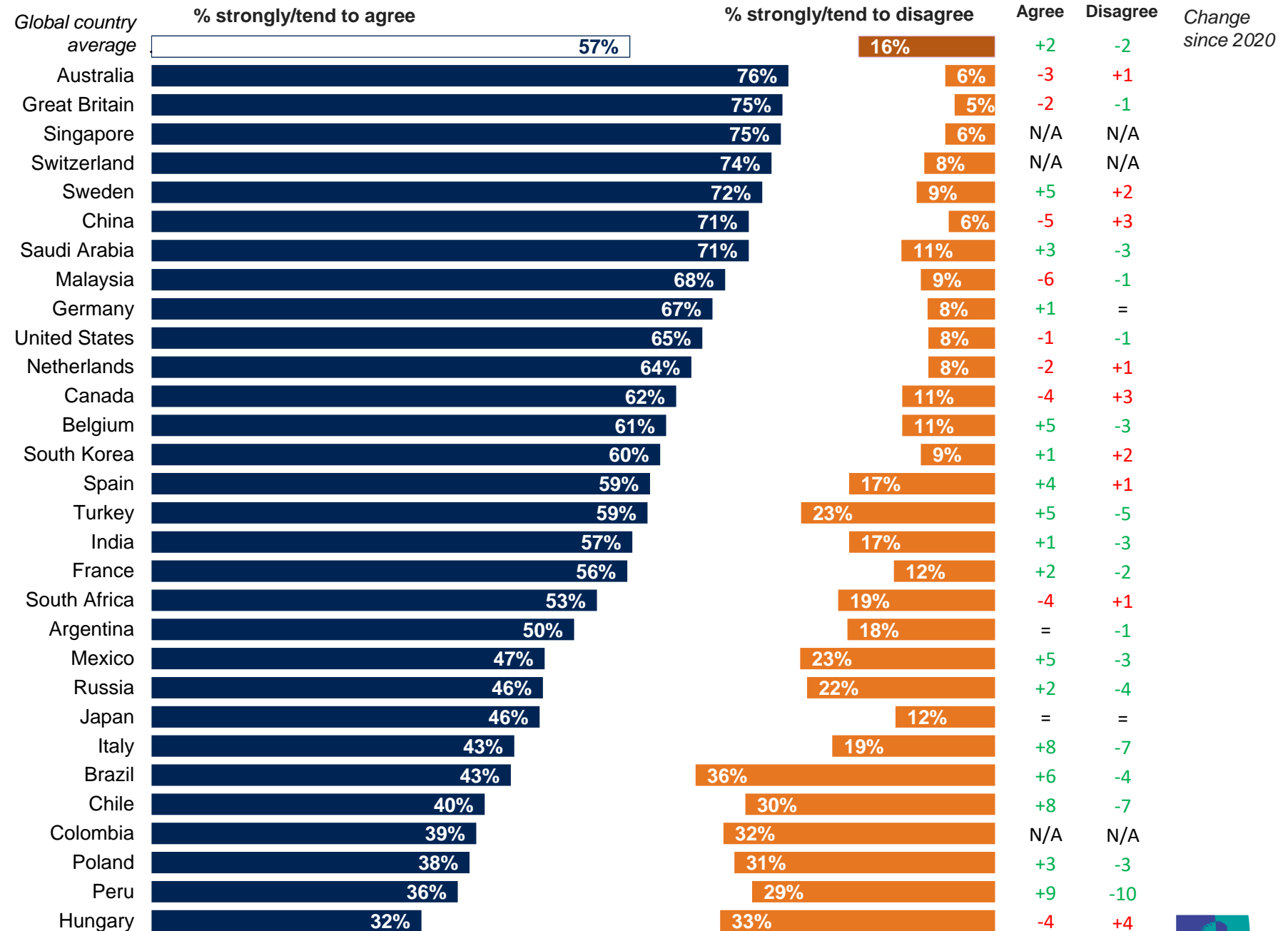
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HEALTHCARE INFORMATION

In my country, information about how to look after my health is readily available when I need it.

To what extent do you agree or disagree with this statement?



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HEALTHCARE CHALLENGES

3

CHALLENGES TO HEALTHCARE SYSTEMS



Waiting times (41%)

Lack of staff (39%)

are the biggest problems facing healthcare systems, according to our 30-country average



Cost of accessing treatment

is third overall (31%) and a greater worry for those in **Chile**, the **US**, and **Singapore**

+9 points

those who say **access to treatment/ waiting times** is a healthcare challenge has increased most in **Great Britain** and **Spain** vs. 2020

+12 points

those who say **not enough staff** is a healthcare challenge has increased most in the **United States** vs. 2020

TOP 5

1. Access to treatment/ waiting times
2. Lack of staff
3. Cost of accessing treatment
4. Bureaucracy
5. Lack of investment in preventative health

HEALTHCARE CHALLENGES

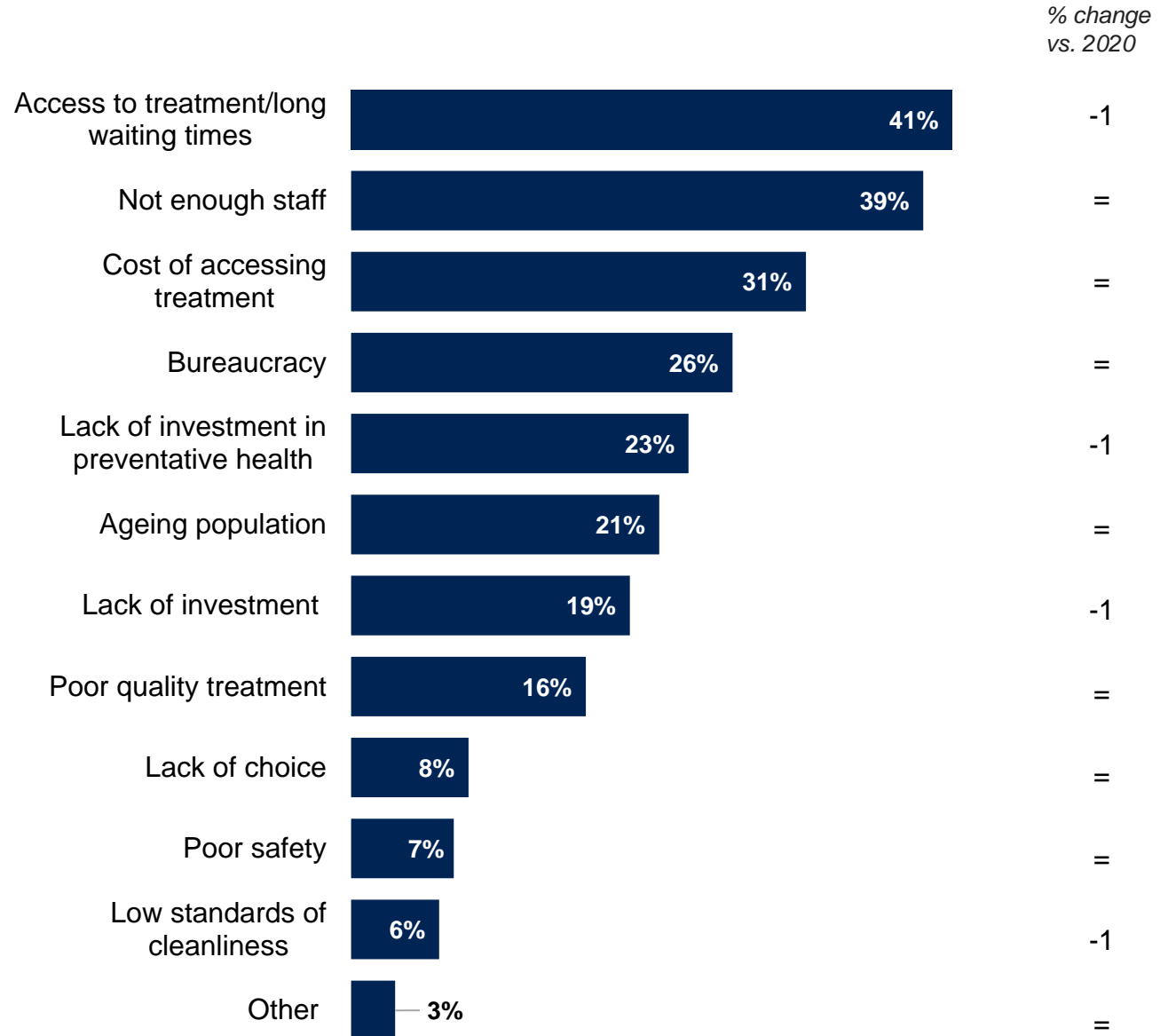
Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?

Global country average

Access to treatment and waiting times emerge as the main problems that people around the world think their country's healthcare system faces – on average four in 10 select these.

Cost of accessing treatment is the third most selected issue globally (31%).

While no country has bureaucracy as their top healthcare challenge, it is widely recognised as a top 3 issue.



HEALTHCARE CHALLENGES

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

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Switzerland	Chile	China	Colombia	Germany	Spain	France	Great Britain	Hungary	India	Italy	Japan	South Korea	Mexico	Malaysia	Netherlands	Peru	Poland	Russia	Saudi Arabia	Sweden	Singapore	Turkey	United States	South Africa
Access to treatment/long waiting times	41%	45%	38%	36%	45%	48%	12%	61%	25%	52%	39%	52%	29%	52%	61%	24%	55%	24%	24%	55%	43%	34%	51%	68%	41%	24%	51%	34%	45%	22%	40%
Not enough staff	39%	24%	47%	57%	19%	61%	44%	27%	21%	22%	58%	51%	63%	56%	58%	22%	45%	52%	31%	19%	38%	66%	25%	26%	40%	21%	71%	29%	27%	28%	38%
Cost of accessing treatment	31%	40%	25%	36%	24%	10%	37%	58%	31%	35%	17%	10%	24%	9%	21%	44%	18%	28%	25%	40%	41%	24%	37%	34%	45%	35%	11%	49%	32%	52%	37%
Bureaucracy	26%	43%	21%	20%	31%	23%	28%	34%	24%	36%	36%	28%	23%	23%	19%	14%	35%	15%	15%	38%	19%	32%	39%	27%	35%	12%	29%	9%	21%	30%	16%
Lack of investment in preventative	23%	32%	18%	26%	50%	19%	12%	30%	28%	39%	18%	37%	17%	17%	22%	23%	26%	15%	20%	38%	17%	14%	40%	25%	8%	16%	13%	8%	18%	17%	21%
Ageing population	21%	3%	31%	29%	5%	30%	34%	8%	52%	3%	27%	20%	22%	26%	13%	15%	12%	48%	47%	5%	13%	27%	2%	19%	7%	14%	20%	56%	12%	16%	6%
Lack of investment	19%	47%	16%	21%	51%	11%	9%	16%	8%	37%	12%	40%	25%	36%	12%	16%	31%	9%	9%	26%	13%	11%	33%	9%	11%	11%	9%	5%	19%	5%	17%
Poor quality treatment	16%	9%	7%	6%	26%	8%	5%	18%	11%	25%	9%	6%	7%	7%	20%	29%	14%	3%	5%	21%	18%	4%	22%	37%	55%	18%	13%	4%	21%	14%	45%
Lack of choice	8%	7%	6%	4%	6%	7%	4%	11%	11%	11%	5%	5%	7%	4%	9%	11%	7%	6%	8%	10%	11%	4%	7%	11%	12%	16%	4%	7%	12%	12%	7%
Poor safety	7%	9%	5%	4%	8%	2%	6%	5%	9%	7%	5%	7%	9%	3%	4%	20%	11%	6%	9%	9%	11%	2%	9%	6%	7%	12%	8%	3%	11%	6%	14%
Low standards of cleanliness	6%	6%	5%	4%	3%	3%	3%	3%	6%	2%	5%	3%	4%	3%	12%	23%	7%	1%	2%	6%	15%	3%	5%	3%	4%	11%	2%	3%	9%	4%	22%
Other	3%	1%	4%	2%	1%	4%	3%	4%	1%	3%	3%	3%	4%	4%	2%	1%	1%	1%	1%	1%	1%	5%	2%	1%	1%	5%	5%	2%	4%	5%	4%

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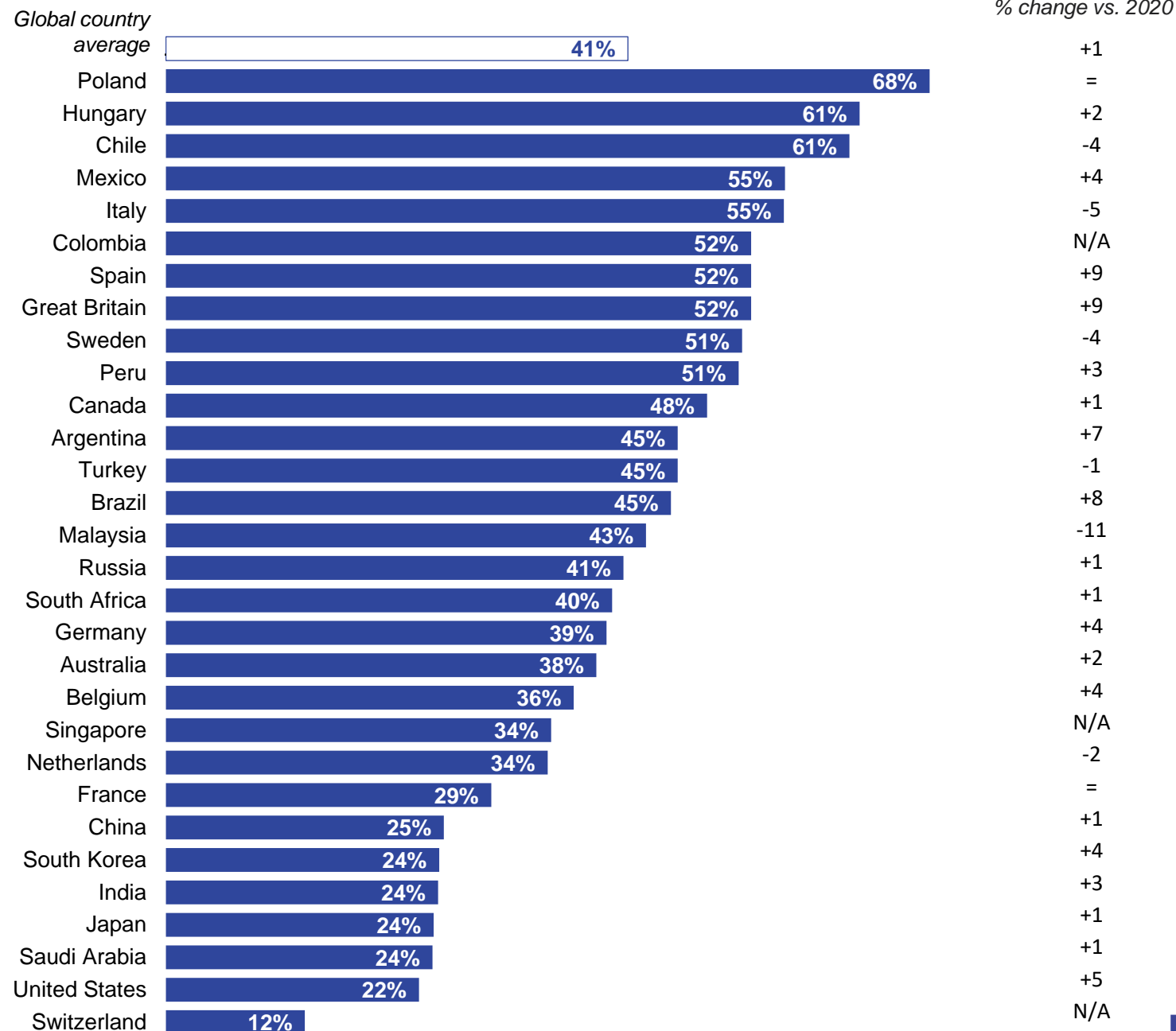
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ACCESS TO TREATMENT/ WAITING TIMES

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

All countries



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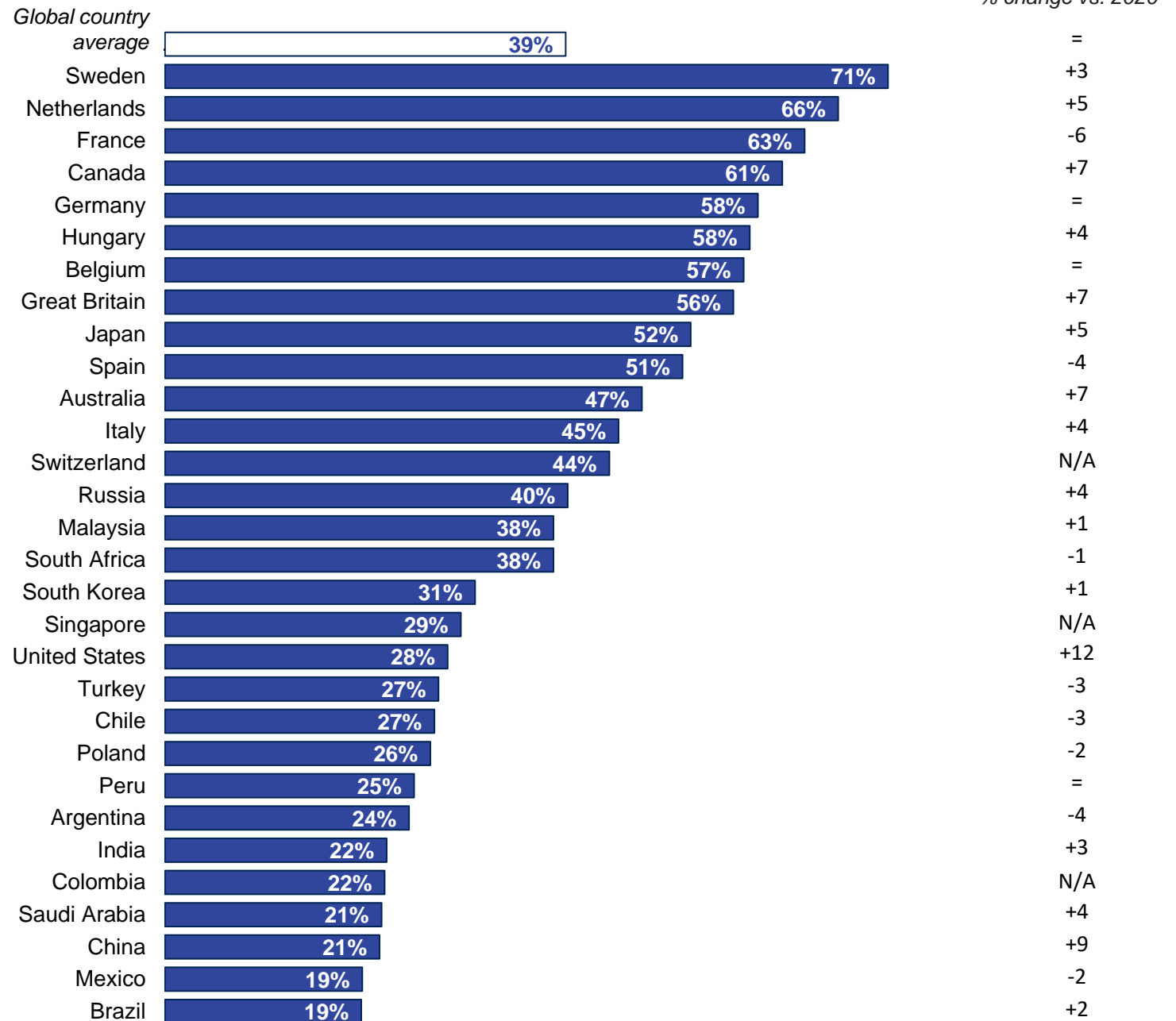
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NOT ENOUGH STAFF

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

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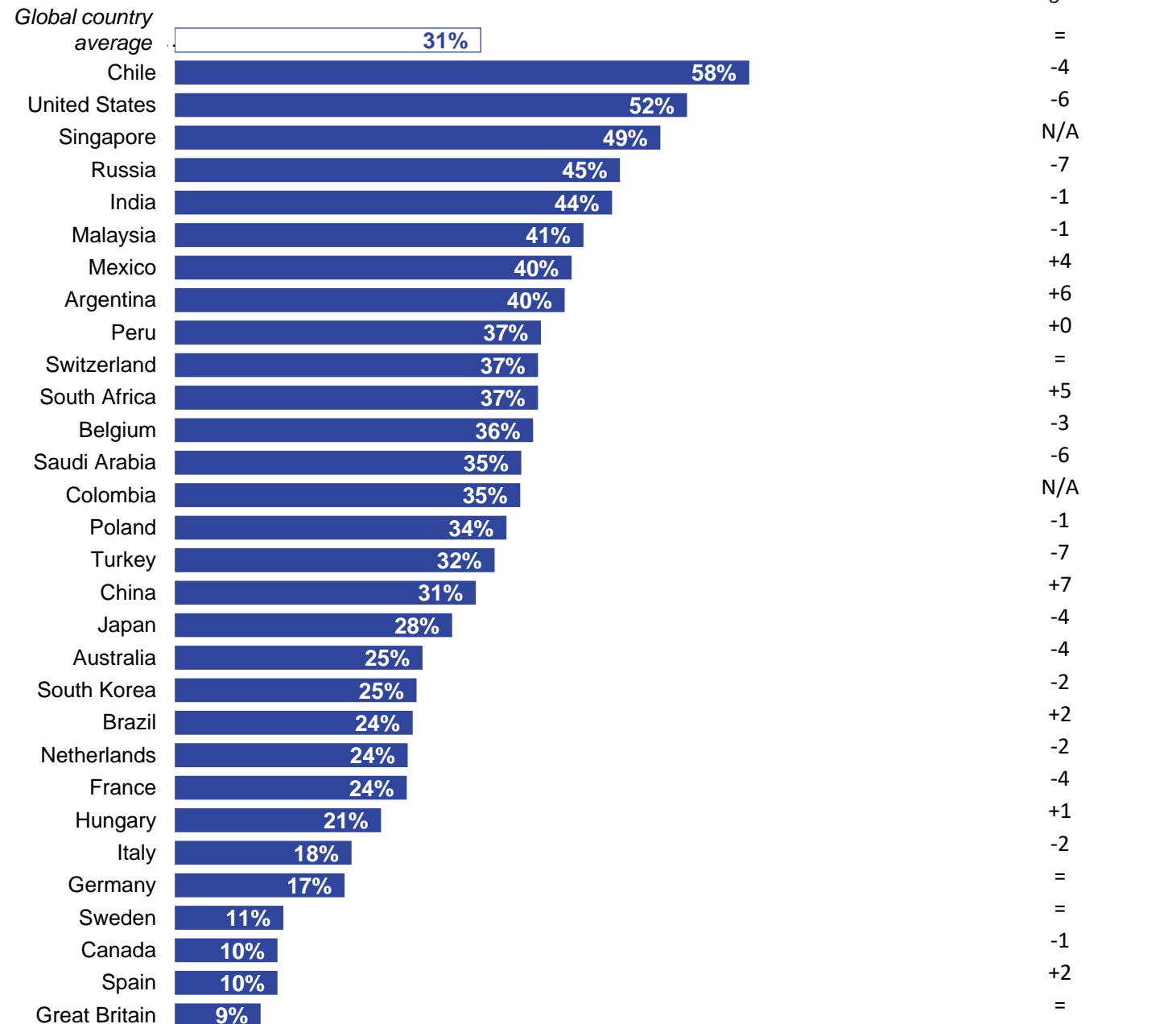
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COST OF ACCESSING TREATMENT

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

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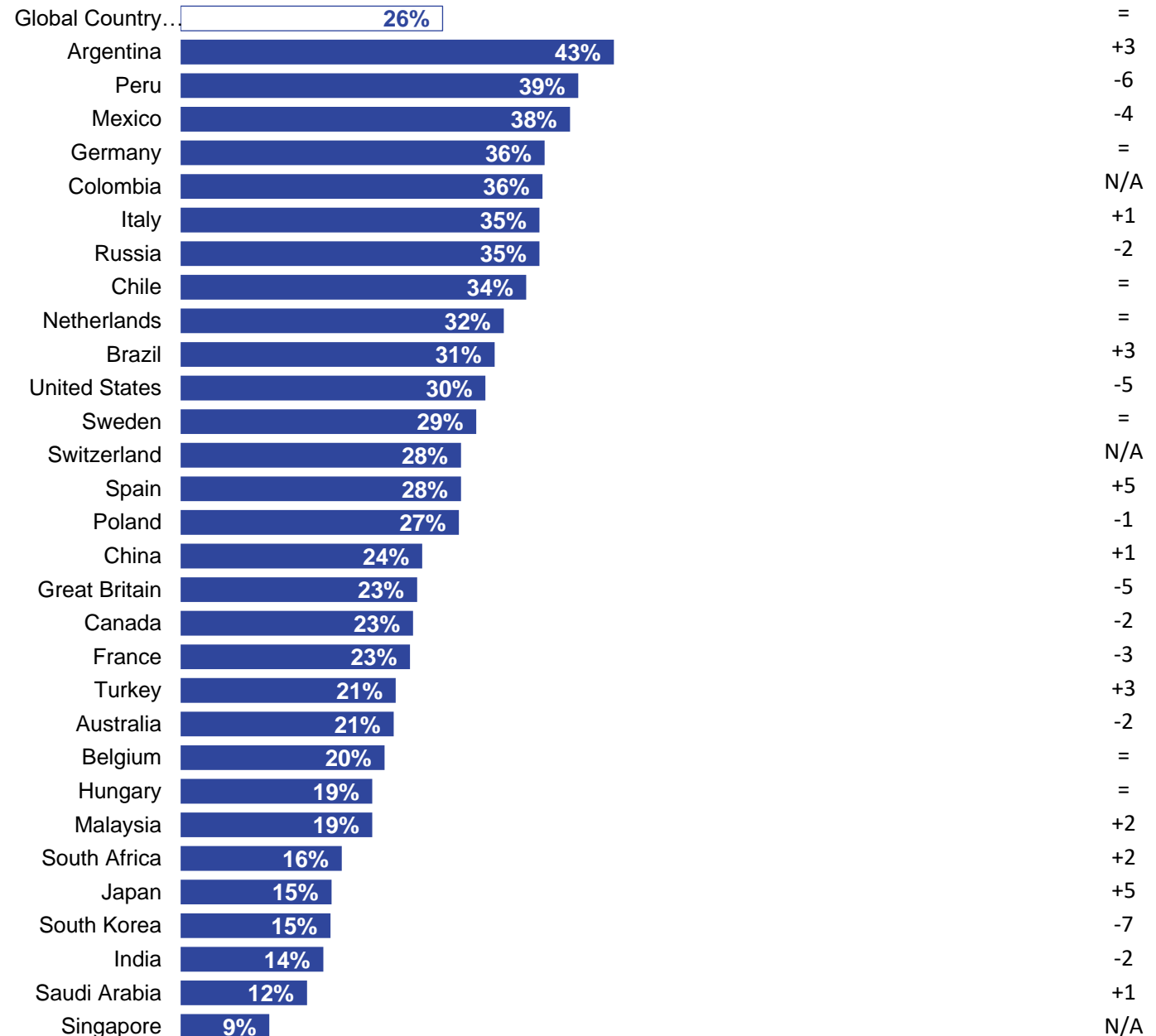
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BUREAUCRACY

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METHODOLOGY

These are the results of a 30-market survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 21,513 adults aged 18-74 in the United States, Canada, Israel, Malaysia, South Africa, and Turkey, aged 21-74 in Singapore, and 16-74 in 24 other markets between Friday, August 20 and Friday, September 3, 2021.

The sample consists of approximately 1,000 individuals in each of Australia, Belgium, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in each of Argentina, Chile, Colombia, Hungary, India, Israel, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Sweden, Switzerland, and Turkey.

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

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

The data is weighted so that each country’s sample composition best reflects the demographic profile of the adult population according to the most recent census data.

The ‘Global Country Average’ reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

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 know” or not stated responses.

The precision of Ipsos online polls is 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 Ipsos’ use of credibility intervals, please visit the Ipsos website.

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

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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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.

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