



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.

- This 34-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 Indonesia, Ireland, Portugal, Romania, Thailand, and United Arab Emirates.
- This is the third wave of this study that has taken place since the start of the Coronavirus pandemic and concern about the virus is still a major issue. It has, however, dropped significantly since 2021.
- 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 and even seen some rises.
- 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 evenly widespread across all the countries surveyed.



GLOBAL HEALTH CONCERNS

1. CORONAVIRUS



47%

Covid-19 has dropped 23 points since 2021 but remains the top concern

- It is still the #1 health problem in 19 of 34 countries. (In 2021 it was top in 25).
- Concern is highest in Peru, Japan, Thailand and Indonesia

2. MENTAL HEALTH



Five percentage point increase in those who consider mental health a top health problem (2022 vs. 2021)

- Mental health has now overtaken cancer to become the second highest concern globally.
- Sweden, Chile and Ireland are the countries most likely to be worried about mental health

3. CANCER



34%

The percentage mentioning Cancer has not changed since 2021

 Highest levels of concern are seen in Portugal (79%), followed by Belgium, Italy, Romania and Spain.



Stress is the 4th concern with 26% on average.

 Switzerland & Argentina are the two most concerned countries (39%).



22% say that obesity is a top concern.

• This rises to 55% (+3 on 2021) in **Mexico**.



Drug abuse (16%) and diabetes (16%) feature as prominent health problems albeit to a lesser extent.

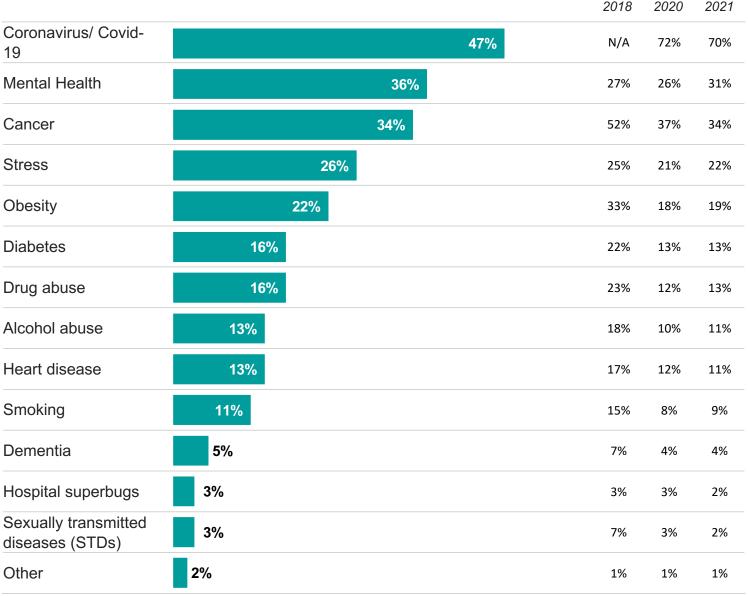




Q: Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Covid-19 is still the top health concern globally, but is dropping sharply (down 23 points from 2021 to 47%).

Most notable is the steady increase in prominence of mental health. Two years of five-point increases means it now surpasses cancer for the first time as the second biggest concern, at 36%.







Coronavirus

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

Coronavirus has slipped significantly since 2021 but still stays number one, overall. As the chart illustrates, there are some big differences in perceptions by country.

		2020	2021
Global country average	47%	72%	70%
Japan	73%	74%	85%
Peru	66%	89%	90%
Thailand	64%	N/A	N/A
Indonesia	63%	N/A	N/A
Mexico	62%	78%	85%
Srazil	62%	82%	84%
ᢝ ∰ Australia	62%	65%	75%
Malaysia	61%	89%	93%
China	61%	78%	66%
South Korea	60%	80%	75%
Germany	57%	66%	69%
C Turkey	55%	82%	78%
United Arab Emirates	51%	N/A	N/A
France	49%	72%	72%
I ◆ I Canada	49%	73%	70%
Colombia	48%	N/A	73%
Saudi Arabia	47%	74%	78%
India	47%	81%	76%
Italy	47%	73%	69%
Spain	45%	87%	74%
United States	43%	66%	68%
Netherlands	42%	77%	66%
Great Britain	40%	76%	66%
Switzerland	39%	N/A	65%
Chile	39%	71%	53%
Poland	36%	63%	46%
Belgium	34%	67%	56%
Ireland	32%	N/A	N/A
- Argentina	30%	76%	71%
South Africa	28%	63%	83%
Romania	27%	N/A	N/A
Portugal	27%	N/A	N/A
Sweden	22%	52%	49%
Hungary	18%	47%	33%



Mental Health

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

The last couple of years have seen two successive five-point rises in the proportion citing mental heath, now making it the second biggest concern globally, surpassing cancer.

Base: 23,507 online adults in 34 countries, 22 July – 5 August 2022. Online samples in Brazil, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates are more urban, more educated, and/or more affluent than the general population. The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

27% 26% 31% 36% Global country average Sweden 63% 59% 59% 63% Chile 62% 26% 50% 59% Ireland 58% N/A N/A N/A 55% Portugal N/A N/A N/A 51% Spain 23% 16% 35% United States 51% 44% 33% 35% 49% Brazil 18% 27% 40% 48% Switzerland N/A N/A 28% Canada 46% 49% 42% 43% Colombia 46% 17% N/A 42% 44% 50% 47% 47% Australia 43% 40% Great Britain 50% 43% 39% Peru 41% 36% 37% Argentina 37% 15% 25% 28% 37% South Africa 16% 22% 27% 35% 27% South Korea 48% 27% Belgium 33% 35% 23% 22% Poland 33% 19% 23% 30% 33% Netherlands N/A 27% 33% 32% N/A N/A N/A Indonesia Malaysia 31% 16% 33% 22% Germany 31% 37% 26% 32% 30% China 40% 24% 25% India 30% 18% 27% 25% Thailand 29% N/A N/A N/A 28% Italy 18% 10% 19% 27% 17% 25% 19% Turkev United Arab Emirates 24% N/A N/A N/A 23% 14% 12% 18% Hungary 20% France 10% 10% 12% 20% N/A N/A Romania N/A 19% Saudi Arabia 20% 12% 14% 15% 6% 8% 11% Mexico 15% Japan 24% 14% 9%

2018

2020

2021



Cancer

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

In 2018, cancer was the number one concern globally at 52%. It now stands third, behind mental health and Covid-19, and has seen little movement since 2020.

Portugal has cancer as its top concern over any other by a significant amount, whereas the rest of the world shows less variation.

		2010	2020	2021
Global country average	34%	52%	37%	34%
Portugal	79%	N/A	N/A	N/A
Belgium	59%	60%	63%	55%
Italy	53%	75%	53%	53%
Spain	49%	68%	49%	53%
Romania	49%	N/A	N/A	N/A
Poland	47%	68%	59%	53%
France	46%	69%	51%	45%
C∙ Turkey	44%	61%	41%	37%
Ireland	44%	N/A	N/A	N/A
Hungary	43%	56%	38%	41%
Peru	43%	53%	41%	36%
Great Britain	41%	50%	46%	41%
Netherlands	40%	N/A	48%	43%
Sweden	35%	36%	39%	36%
Colombia	34%	50%	N/A	31%
L Chile	33%	38%	33%	34%
Switzerland	32%	N/A	N/A	29%
I ■ Canada	30%	58%	35%	26%
Srazil	29%	57%	27%	31%
United States	29%	42%	26%	22%
China	28%	55%	29%	35%
■ Mexico	27%	38%	29%	30%
Germany	26%	45%	30%	25%
Japan	26%	59%	30%	22%
Argentina	25%	37%	31%	27%
Saudi Arabia	24%	34%	20%	19%
Australia	23%	39%	30%	24%
South Korea	21%	37%	19%	21%
India	21%	38%	20%	18%
South Africa	20%	44%	24%	23%
Thailand	19%	N/A	N/A	N/A
Malaysia	18%	35%	18%	16%
United Arab Emirates	16%	N/A	N/A	N/A
Indonesia	16%	N/A	N/A	N/A



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

Concerns about stress remain steady globally, with more than 20% rating it as a top worry.

The four-point increase recorded this year is significant and puts stress at its highest level since the beginning of this tracker.

		2018	2020	2021
Global country average	26%	25%	21%	22%
- Argentina	39%	34%	29%	34%
Switzerland	39%	N/A	N/A	31%
South Korea	35%	48%	35%	33%
Sweden	35%	39%	33%	28%
Peru	35%	29%	26%	35%
Colombia	34%	35%	N/A	30%
Turkey ■ Turkey	34%	31%	31%	28%
Romania	34%	N/A	N/A	N/A
Belgium	31%	31%	26%	30%
Japan	31%	37%	33%	28%
Chile	30%	23%	25%	27%
Poland	29%	25%	30%	26%
Italy Italy	29%	26%	18%	21%
France	28%	33%	23%	23%
Spain	28%	25%	18%	19%
Hungary	27%	32%	25%	23%
Srazil	27%	19%	18%	22%
Thailand	27%	N/A	N/A	N/A
India	25%	26%	19%	20%
China	24%	25%	16%	26%
South Africa	24%	17%	18%	17%
Netherlands	23%	N/A	19%	18%
Mexico	23%	18%	19%	15%
Portugal	22%	N/A	N/A	N/A
Indonesia	22%	N/A	N/A	N/A
Malaysia	18%	14%	17%	18%
Ireland	18%	N/A	N/A	N/A
United States	17%	13%	15%	14%
Saudi Arabia	16%	12%	8%	7%
United Arab Emirates	15%	N/A	N/A	N/A
Germany	14%	24%	17%	16%
Canada	14%	14%	13%	16%
Great Britain	14%	12%	9%	11%
*** Australia	11%	9%	14%	12%



Obesity

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

In fifth place, obesity is still less prominent than it was in 2018 though concern increased by three points this year.

Since 2018 Mexico has consistently stood out as the country most worried about obesity. Mexicans have it as their second highest concern, behind Coronavirus.

		2018	2020	2021
Global country average	22%	33%	18%	19%
Mexico	55%	76%	52%	52%
Chile	38%	59%	36%	43%
Portugal	35%	N/A	N/A	N/A
Great Britain	29%	50%	27%	28%
Netherlands	28%	N/A	21%	28%
Malaysia	27%	52%	20%	18%
Romania	26%	N/A	N/A	N/A
Sweden	25%	30%	21%	23%
- Argentina	25%	31%	20%	21%
Peru	25%	28%	26%	21%
Poland	25%	34%	11%	18%
II Belgium	24%	23%	22%	20%
Spain Spain	23%	43%	15%	22%
United States	23%	40%	25%	20%
France	23%	33%	17%	20%
Ireland	23%	N/A	N/A	N/A
Hungary	22%	29%	14%	22%
Saudi Arabia	22%	37%	15%	15%
United Arab Emirates	22%	N/A	N/A	N/A
Turkey ■ Turkey	20%	44%	19%	22%
Colombia	20%	23%	N/A	16%
™ Australia	19%	46%	22%	17%
**** China	19%	28%	13%	17%
Germany	18%	30%	14%	17%
Canada	17%	31%	12%	12%
Switzerland	16%	N/A	N/A	12%
Srazil	15%	24%	11%	13%
South Korea	15%	20%	10%	11%
Italy	13%	24%	8%	9%
Thailand	11%	N/A	N/A	N/A
India	10%	21%	7%	9%
South Africa	9%	21%	7%	7%
Indonesia	6%	N/A	N/A	N/A



VIEWS OF HEALTHCARE SERVICES



50%

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

this ranges from:

79% in Saudi Arabia

to 14% in Poland

55% of Britons say their system provides equal care to all, placing it seventh. UAE (67%), Saudi Arabia (66%) & Portugal (62%) are top



59%



think vaccinations against infectious diseases should be compulsory

83%



in Great Britain say the system is overstretched

vs. **61%** global country average



Nearly 9 in 10

in **South Africa** say that most people in their country cannot afford good healthcare (85%)



Future Healthcare

Quality of care going into the future fluctuates a lot, from 78% (UAE) to 8% (Hungary)



Quality of healthcare

Q: 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.

Though a majority of countries rate their systems by at least the same positive margin as the global average, we still observe a few outliers, particularly in Latin America and Central Europe.

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The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

% Very good/good % Poor/very poor 2018 2020 2021 19% 44% 50% 53% Global country average 50% 6% 79% Saudi Arabia 54% 73% 76% 77% 7% United Arab Emirates N/A N/A N/A 69% 8% 71% 81% 78% Australia Belgium 69% 9% 64% 70% 76% 68% 10% Switzerland N/A N/A 78% 68% 9% Netherlands N/A 76% 77% 66% 10% 72% 71% 67% Malavsia 66% 11% 63% 71% 67% United States 64% 6% 39% 53% 57% China Great Britain 63% 13% 73% 74% 68% Sweden 63% 12% 51% 64% 64% 60% India 16% 55% 52% 56% 57% 8% 55% 58% South Korea 50% 57% 8% N/A Indonesia N/A N/A 55% 16% 55% 59% 62% France 55% 13% 58% 49% 58% Argentina **I Canada** 54% 16% 62% 72% 64% 54% Germany 15% 56% 66% 60% Thailand 53% 9% N/A N/A N/A 50% 21% 52% 60% Spain 58% 46% 23% 46% 47% 50% South Africa 28% N/A 42% N/A N/A Ireland 41% 9% 34% 33% 36% Japan 38% 29% Colombia 25% N/A 34% 37% 26% 41% 45% C Turkey 46% 35% 26% 32% 30% 29% Chile Italy 34% 29% 42% 33% 46% 29% 31% 29% 32% 26% Mexico 29% 31% 31% Brazil 18% 30% Peru 21% 35% 20% 18% 19% 21% 39% Romania N/A N/A N/A 14% 53% 21% Hungary 20% 16% 14% 43% 14% 9% 12% Poland

Quality of healthcare in the future

Q: 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?

Only a minority expect major changes in the coming years.

Latin American countries stand out by rating their systems negatively but expressing optimism for the future.

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% Improve % Get worse 2018 2020 2021 33% 20% 34% 32% 34% Global country average 78% 5% N/A N/A N/A United Arab Emirates Saudi Arabia 72% 6% 57% 67% 77% Colombia 71% 9% 66% N/A 66% 62% 8% Brazil 64% 66% 61% 59% 8% Peru 63% 68% 59% China 57% 3% 48% 39% 61% Chile 54% 16% 55% 54% 58% 53% 9% 52% 53% 56% India 52% 56% Argentina 11% 53% 60% Mexico 52% 8% 47% 58% 56% 52% 3% Indonesia N/A N/A N/A Thailand 44% 7% N/A N/A N/A 39% 21% 35% 41% 39% South Africa 29% Portugal 35% N/A N/A N/A 33% 8% 45% Malaysia 49% 41% **Spain** 29% 23% 44% 45% 38% Turkey 24% 36% 44% 31% 27% 23% 19% **** Australia 22% 28% 27% United States 21% 16% 18% 21% 17% Sweden 19% 25% 28% 19% 25% Switzerland 19% 20% N/A 24% N/A 18% 12% South Korea 24% 17% 21% 18% Great Britain 39% 8% 14% 13% 17% 27% Belgium 22% 19% 20% Canada 16% 32% 15% 17% 17% 21% 16% Romania N/A N/A N/A France 15% 43% 14% 13% 11% 15% 32% 10% 16% 11% Germany Ireland 15% 31% N/A N/A N/A Netherlands 13% 29% 15% 15% N/A 28% Poland 10% 18% 10% 16% Italy 9% 31% 14% 18% 17% 9% 15% 15% 11% 11% Japan 8% Hungary 12% 12% 45% 10%

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Trust in healthcare

Q: 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?

A majority globally have trust in their local healthcare system, but variation by country is significant with trust ranging from 91% in Portugal and 10% in Hungary.

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% Strongly/Tend to agree % Tend to/Strongly disagree 2018 2020 2021 53% 22% Global country average 40% 50% 51% Portugal 91% 4% N/A N/A N/A 71% Saudi Arabia 11% 46% 67% 71% 71% United Arab Emirates 14% N/A N/A N/A China 69% 8% 46% 74% 70% 66% Netherlands 12% N/A 67% 67% India 66% 14% 51% 54% 59% Switzerland 65% 15% N/A N/A 74% Malaysia 64% 10% 63% 75% 68% Spain 64% 16% 64% 62% 65% Thailand 62% 16% N/A N/A N/A Great Britain 61% 13% 63% 68% 65% Belgium 61% 11% 54% 59% 59% Sweden 61% 19% 48% 59% 56% 60% Maria Australia 14% 61% 74% 69% France 60% 17% 50% 58% 57% 60% 9% N/A N/A N/A Indonesia 53% 18% Canada 56% 64% 59% South Korea 53% 13% 36% 54% 55% Argentina 53% 17% 47% 50% 55% 53% 13% Japan 37% 48% 49% 21% 51% Germany 45% 58% 55% 50% 28% Ireland N/A N/A N/A 48% 22% United States 43% 52% 49% 46% 30% South Africa 37% 42% 42% 23% Italy 45% 36% 45% 52% Turkey 35% 42% 43% 43% 45% 31% Brazil 41% 20% 33% 37% 41% 34% Colombia 26% N/A 36% 40% 30% Mexico 31% 38% 40% 37% 33% Chile 34% 30% 33% 31% 38% Poland 22% 18% 25% Peru 27% 38% 24% 28% 28% Romania 24% 46% N/A N/A N/A 10% 70% Hungary 13% 16% 11%

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Cost of healthcare

Q: Many people in my country cannot afford good healthcare.

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

A majority of respondents in the 34 countries surveyed acknowledge that many people in their countries cannot afford good healthcare.

Sweden and South Korea tend to disagree with a plurality saying it is not the case.

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The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

Global country average 61% 18% 59% 59% 58% South Africa 7% 85% 83% 88% 83% Hungary 83% 9% 77% 83% 80% Chile 82% 8% 81% 85% 81% Peru 82% 8% 77% 86% 81% 82% 5% Romania N/A N/A N/A Brazil 80% 7% 74% 83% 90% Argentina 78% 12% 70% 81% 80% Colombia 77% 11% 78% N/A 83% Mexico 77% 10% 75% 76% 80% Poland 73% 12% 73% 83% 74% Thailand 72% 12% N/A N/A N/A India 70% 13% 72% 73% 73% 70% Ireland 13% N/A N/A N/A United States 69% 10% 75% 69% 67% Indonesia 69% 12% N/A N/A N/A Turkey 67% 20% 57% 64% 63% United Arab Emirates 62% 18% N/A N/A N/A Saudi Arabia 58% 18% 56% 64% 52% Spain 57% 22% 52% 58% 57% France 19% 55% 60% 58% 49% Portugal 54% 23% N/A N/A N/A 53% 16% Italy 54% 53% 55% 20% China 53% 63% 55% 51% 51% Malaysia 20% 51% 50% 56% Belgium 51% 16% 32% 55% 54% 17% 50% Japan 44% 48% 53% 50% 23% **Australia** 46% 42% 43% 50% 26% Great Britain 30% 28% 37% Switzerland 45% 28% N/A N/A 42% 29% 39% Germany 40% 37% 37% 39% 31% Netherlands N/A 29% 33% 38% 29% Canada 27% 29% 33% South Korea 24% 38% 28% 25% 26% Sweden 24% 47% 25% 24% 19%

% Strongly/Tend to agree

% Tend to/Strongly disagree

2018

2020

2021

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Equality of care

Q: 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?

There is neither a majority globally to agree or to disagree with this statement, but countries whose citizens agree tend to be the ones where satisfaction with the current system is highest, and vice versa.

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% Strongly/Tend to agree % Tend to/Strongly disagree 2018 2020 2021 42% 34% Global country average 31% 37% 39% 67% 17% United Arab Emirates N/A N/A N/A Saudi Arabia 66% 12% 41% 57% 65% Portugal 62% 16% N/A N/A N/A 61% 12% China 43% 67% 54% 59% 14% Malaysia 57% 62% 59% India 24% 56% 40% 41% 45% Great Britain 55% 22% 54% 63% 56% Spain 54% 23% 52% 51% 61% 52% Thailand 19% N/A N/A N/A South Korea 49% 18% 33% 49% 49% 26% 49% Canada 50% 54% 53% 49% 25% Australia 47% 53% 50% Sweden 47% 29% 40% 40% 50% Netherlands 46% 23% #N/A 52% 47% 46% 31% France 30% 38% 42% Switzerland 45% 31% N/A N/A 51% 44% 28% Indonesia N/A N/A N/A Belgium 43% 28% 34% 34% 35% 41% 21% Japan 26% 35% 35% 39% 33% Italy 28% 36% 44% Germany 36% 40% 37% 23% 33% 40% Argentina 35% 34% 32% 34% 34% 47% Turkey 35% 36% 41% 34% 41% Mexico 24% 22% 25% Ireland 31% 47% N/A N/A N/A 51% Brazil 29% 18% 23% 23% 45% United States 28% 24% 24% 27% 27% 56% South Africa 17% 20% 23% 52% Colombia 27% 17% N/A 19% Peru 25% 51% 19% 18% 19% 57% Poland 23% 17% 13% 19% 22% 56% Romania N/A N/A N/A Chile 19% 63% 19% 13% 16% 15% 70% Hungary 13% 19% 14%

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Healthcare capacity

Q: The healthcare system in my country is overstretched.

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

A majority of respondents in the 34 countries surveyed think their country's healthcare system is overstretched.

No country disagrees by a majority, though China, Poland and Japan disagree by a plurality.

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Online samples in Brazil, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates are more urban, more educated, and/or more affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

% Strongly/Tend to agree % Tend to/Strongly disagree 2018 2020 2021 15% 61% Global country average 54% 55% 56% Portugal 87% 6% N/A N/A N/A 4% Great Britain 83% 85% 81% 85% Sweden 82% 5% 74% 77% 76% France 78% 8% 70% 73% 66% 78% 10% Ireland N/A N/A N/A Hungary 76% 10% 80% 77% 73% Netherlands 74% 7% N/A 65% 67% ■ Canada 73% 6% 67% 64% 74% **Australia** 72% 8% 60% 52% 58% Spain 71% 11% 70% 75% 71% Chile 70% 11% 70% 65% 67% Italy 70% 7% 64% 61% 63% 11% Peru 69% 60% 75% 72% 69% Romania 10% N/A N/A N/A 67% 12% Brazil 66% 69% 71% 65% Colombia 69% N/A 75% Belgium 64% 7% 33% 57% 57% Thailand 63% 14% N/A N/A N/A Argentina 59% 16% 60% 67% 59% 59% 12% South Africa 57% 64% 62% 59% 22% C Turkey 46% 46% 53% 59% Germany 13% 55% 35% 44% 58% 12% India 46% 51% 54% 57% 21% United Arab Emirates N/A N/A N/A Saudi Arabia 56% 12% 41% 56% 53% 16% 53% Mexico 57% 51% 52% United States 51% 13% 48% 48% 55% 47% 23% Indonesia N/A N/A N/A 46% Switzerland 20% N/A N/A 39% 42% 25% Malaysia 42% 39% 44% 31% 35% China 43% 31% 27% 30% 26% South Korea 24% 27% 29% Poland 27% 43% 32% 22% 25% 27% 15% Japan 15% 12% 13%

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Getting an appointment

Q: 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?

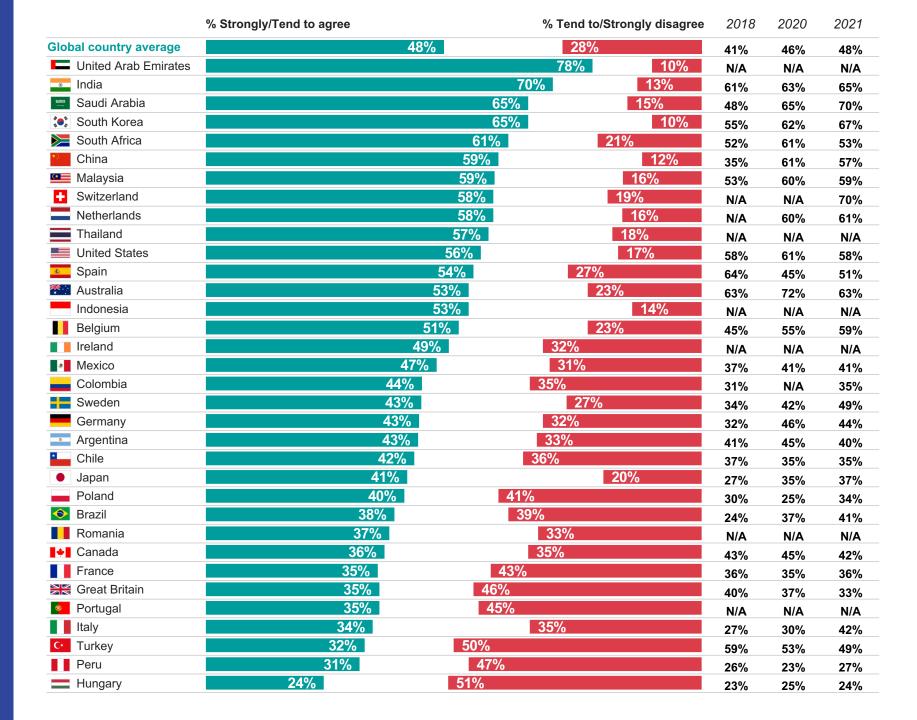
Though a plurality globally find it easy to get an appointment in their local area, opinions are quite divided in several countries.

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The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

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Waiting times

Q: 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?

A majority globally agree that waiting times are too long.

Switzerland is the only country where (slightly) more people disagree than agree.

Base: 23,507 online adults in 34 countries, 22 July – 5 August 2022.

Online samples in Brazil, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates are more urban, more educated, and/or more affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

% Strongly/Tend to agree % Tend to/Strongly disagree 2018 2020 2021 64% 14% Global country average 62% 62% 60% Portugal 88% 5% N/A N/A N/A 5% Hungary 86% 78% 80% 83% ■ Peru 81% 9% 75% 84% 74% 81% 8% Poland 77% 83% 81% 78% 8% Brazil 73% 79% 84% Chile 76% 9% 77% 77% 76% Colombia 75% 9% 74% N/A 78% 75% 7% Great Britain 62% 68% 73% C Turkey 75% 14% 51% 66% 69% Spain 73% 7% 70% 74% 72% 10% Argentina 71% 64% 68% 70% 70% 8% Italy 70% 72% 73% 70% 13% Mexico 74% 71% 73% 70% Romania 10% N/A N/A N/A 68% 9% Canada 62% 61% 65% 67% 11% Germany 65% 60% 61% Ireland 67% 15% N/A N/A N/A France 66% 14% 53% 57% 51% Belgium 65% 11% 38% 56% 57% Thailand 64% 12% N/A N/A N/A 63% 13% Malaysia 61% 62% 56% 12% Sweden 62% 59% 60% 59% 58% 13% Indonesia N/A N/A N/A 57% India 19% 55% 55% 55% 57% 13% Japan 47% 58% 57% 56% 19% Australia 43% 41% 43% 17% Netherlands 53% N/A 47% 46% 23% South Africa 50% 54% 56% 55% United Arab Emirates 50% 25% N/A N/A N/A 47% 26% Saudi Arabia 50% 49% 43% 24% United States 43% 41% 36% 40% China 41% 23% 54% 47% 39% South Korea 37% 31% 38% 37% 35% 34% 35% Switzerland N/A N/A 28%

Compulsory vaccinations

Q: Vaccinating against serious infectious diseases should be compulsory.

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

A majority declare themselves to be in favour of compulsory vaccinations.

The only country where more people disagree than agree is Portugal.

Base: 23,507 online adults in 34 countries, 22 July – 5 August 2022.

Online samples in Brazil, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates are more urban, more educated, and/or more affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

% Strongly/Tend to agree % Tend to/Strongly disagree 2018 2020 2021 59% 18% Global country average 67% 64% 62% 78% 9% United Arab Emirates N/A N/A N/A 5% Indonesia 78% N/A N/A N/A 75% Mexico 10% 74% 76% 76% 74% 11% India 74% 76% 74% 72% 13% Brazil 75% 77% 78% Peru 72% 13% 77% 81% 72% 10% Argentina 72% 82% 74% 72% Chile 72% 12% 73% 77% 73% 71% Colombia 15% 80% N/A 72% Saudi Arabia 68% 12% 64% 80% 72% 66% Turkey 16% 81% 72% 71% Malaysia 64% 10% 76% 86% 81% Thailand 63% 16% N/A N/A N/A 62% China 11% 60% 59% 62% **Australia** 61% 15% 72% 62% 61% South Korea 60% 15% 71% 74% 65% Great Britain 60% 17% 67% 59% 60% 58% Spain 16% 65% 66% 58% 57% 17% Italy 63% 55% 67% Sweden 56% 23% 56% 60% 56% 56% 17% Canada 61% 60% 63% 54% 21% Belgium 56% 58% 54% 54% 21% Poland 62% 50% 51% 53% 19% France 50% 55% 53% 52% Germany 23% 54% 47% 52% 27% 48% Netherlands 53% 47% 48% South Africa 48% 30% 78% 66% 46% 47% 23% Romania N/A N/A N/A Ireland 46% 28% N/A N/A N/A 45% 32% Switzerland N/A 49% 45% 44% 20% United States 53% 50% 50% 43% 19% Japan 52% 49% 43% 41% 33% Hungary 52% 42% 41% 38% 41% Portugal N/A N/A N/A

Healthcare information

Q: 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?

A majority feel well informed globally but people in countries with lower levels of satisfaction with their respective systems also tend to be less satisfied with the information they get.

Base: 23,507 online adults in 34 countries, 22 July – 5 August 2022.

Online samples in Brazil, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates are more urban, more educated, and/or more affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

	% Strongly/Tend to agree	% Tend	to/Strongly disagree	2018	2020	202
Blobal country average	5	6%	17%	50%	55%	57%
China China		72%	6%	62%	76%	719
United Arab Emirate	s	72%	12%	N/A	N/A	N/A
Sweden		70%	7%	31%	67%	72%
Saudi Arabia		70%	11%	46%	68%	719
Great Britain		69%	9%	41%	77%	75%
Australia		68%	8%	78%	76%	68°
Malaysia		66%	9%	59%	74%	689
Netherlands		66%	9%	N/A	66%	64
South Korea		66%	8%	56%	59%	60
Switzerland		65%	13%	N/A	74%	65
Thailand		64%	12%	N/A	N/A	N/
India		63%	15%	56%	56%	57
United States		62%	10%	54%	66%	65
Germany		61%	10%	66%	67%	61
Belgium		60%	10%	54%	56%	60
France		60%	14%	56%	61%	60
🛂 Canada		59%	12%	66%	62%	59
Spain Spain		58%	16%	55%	59%	58
South Africa		57%	19%	N/A	N/A	N/
Indonesia		57%	15%	53%	57%	53
Japan		6%	12%	N/A	N/A	N/
Ireland		6%	19%	46%	46%	56
Turkey	51%			63%	54%	59
Mexico	51%		18%	42%	47%	51
Argentina	49%		14%	50%	50%	49
Colombia	46%	27		N/A	39%	46
Poland	45%	27		35%	38%	45
Italy	42%		25%	35%	43%	42
Srazil	41%	30%		37%	43%	41
Chile	39%	27		32%	40%	39
Romania	38%		25%	N/A	N/A	N/
Peru	37%	34%		27%	36%	37
Portugal	37%	29%	0	N/A	N/A	N/
Hungary	35%	33%		36%	32%	35

% Tond to/Strongly disagree

2021

% Strongly/Tend to agree

Health service information

Q: 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?

Similarly to information about ones health, information about services available are lower in the countries with lower satisfaction levels.

Base: 23,507 online adults in 34 countries, 22 July – 5 August 2022.

Online samples in Brazil, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates are more urban, more educated, and/or more affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

	% Strongly/Tend to agree	% Tend	to/Strongly disagree	2018	2020	2021
Global country average	55%		19%	47%	52%	55%
United Arab Emirates		73%	13%	N/A	N/A	N/A
China		72%	7%	53%	71%	73%
Saudi Arabia		72%	12%	44%	67%	72%
Mustralia		70%	8%	77%	71%	70%
Sweden		70%	8%	58%	70%	72%
Great Britain		68%	10%	69%	73%	70%
Switzerland		66%	12%	63%	71%	70%
Malaysia		66%	9%	N/A	76%	66%
Netherlands		66%	9%	N/A	69%	67%
South Korea		66%	8%	54%	61%	63%
India		65%	15%	50%	52%	60%
Thailand		64%	15%	N/A	N/A	N/A
Germany		51%	14%	54%	62%	61%
Belgium		61%	10%	62%	63%	61%
United States	589	%	12%	61%	63%	62%
France	56%		17%	50%	56%	56%
☀ Canada	55%		15%	50%	58%	55%
Spain	55%		18%	64%	62%	55%
Indonesia	55%		14%	N/A	N/A	N/A
Ireland	54%		18%	N/A	N/A	N/A
Turkey	52%	27	7%	66%	63%	59%
South Africa	51%		23%	45%	47%	51%
Argentina	51%		18%	47%	52%	48%
Japan	50%		11%	42%	42%	50%
Mexico	45%	2	26%	31%	41%	45%
L Chile	43%		23%	35%	36%	43%
C olombia	42%	32%		N/A	33%	42%
It aly	39%		25%	24%	33%	39%
Poland	39%	32%		34%	41%	39%
Srazil	37%	34%		30%	33%	37%
Portugal	37%	36%		N/A	N/A	N/A
Peru	35%	37%		24%	29%	35%
Romania	34%	30%		N/A	N/A	N/A
Hungary	31%	34%		35%	29%	31%



CHALLENGES TO HEALTHCARE SYSTEMS

1. WAITING TIME



42%

Proportion saying access to treatment/waiting times is a healthcare challenge is little changed (+1)

Highest levels of concern in Hungary,
 Chile, and Portugal (65%)

2. LACK OF STAFF



42%

Three-point increase in not enough staff being a healthcare challenge vs 2021 survey

 Concern has increased the most in Turkey (+15 pts.)

3. COST OF TREATMENT



31%

Of those in our 34-country survey worry about the cost of accessing treatment

 Highest levels of concern in Indonesia, the U.S., and Chile

Bureaucracy is the fourth concern with 25% on average

- Argentina (43%) & Mexico (41%) rank first on this measure
- Bureaucracy ranges from 43% down to 10% (United Arab Emirates)

Lack of investment in preventive health remains the fifth concern with 22%

 Portugal (46%) & Brazil (43%) rank first on this measure Lack of investment in the system in general is now ranked sixth with 20%

- Argentina (44%) leads on this measure with Brazil (40%) second
- Indonesia (5%) ranks the lowest



Healthcare challenges

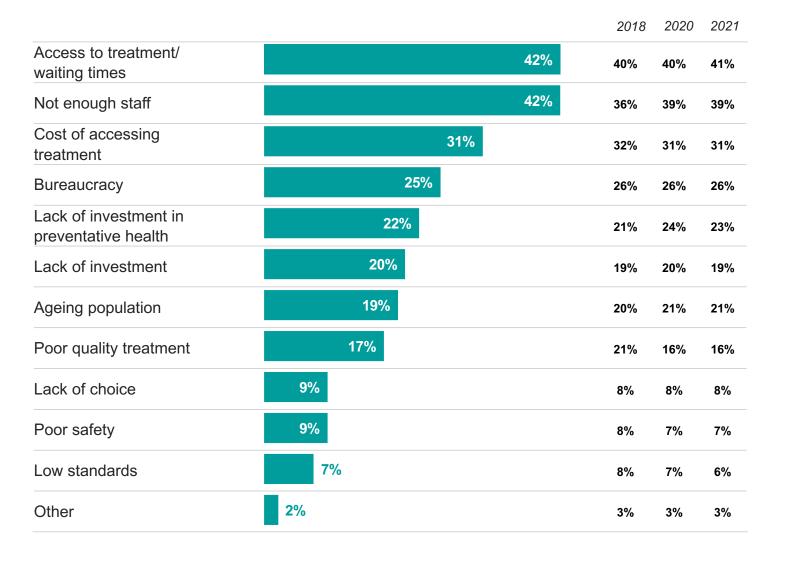
Q: Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?

Global Country average

Access to treatment/waiting times emerge as the main problems that people around the world think their country's healthcare system faces – on average four in ten select these. *Not enough staff* is joint first for the first time since 2018.

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 among the main issues.





The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

Access to treatment/ waiting times

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

All countries

		2018	2020	2021
Global country average	42%	41%	40%	41%
H ungary	65%	65%	59%	61%
Chile	65%	64%	64%	61%
Portugal	65%	N/A	N/A	N/A
Poland	63%	70%	68%	68%
Sweden	58%	52%	55%	51%
C Turkey	58%	38%	46%	45%
C olombia	57%	59%	N/A	52%
I Italy	56%	59%	60%	55%
Peru	52%	46%	48%	51%
Spain	51%	52%	43%	52%
Ireland Ireland	51%	N/A	N/A	N/A
Mexico	50%	48%	51%	55%
ধ Canada	47%	49%	47%	48%
Malaysia	47%	43%	53%	43%
Great Britain	46%	32%	43%	52%
Thailand	46%	N/A	N/A	N/A
- Argentina	43%	35%	38%	45%
Srazil	42%	35%	37%	45%
South Africa	42%	41%	39%	40%
Indonesia	41%	N/A	N/A	N/A
Belgium	40%	26%	32%	36%
Germany	39%	37%	35%	39%
🥶 Australia	37%	37%	36%	38%
Romania	35%	N/A	N/A	N/A
Netherlands	34%	N/A	36%	34%
France	29%	29%	29%	29%
China	26%	26%	24%	25%
South Korea	25%	26%	20%	24%
Japan	23%	20%	23%	24%
United States	23%	22%	17%	22%
India I	22%	22%	21%	24%
Saudi Arabia	18%	21%	23%	24%
Switzerland	18%	N/A	N/A	12%
United Arab Emirates	16%	N/A	N/A	N/A

Not enough staff

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

All countries

		2018	2020	2021
Slobal country average	42%	36%	39%	39%
Sweden	76%	68%	68%	71%
France	69%	67%	69%	63%
Netherlands	67%	N/A	61%	66%
Belgium	67%	38%	57%	57%
ধ Canada	63%	54%	54%	61%
Hungary	61%	63%	54%	58%
Germany	59%	61%	58%	58%
Australia	58%	37%	40%	47%
Portugal	58%	N/A	N/A	N/A
Great Britain	56%	54%	49%	56%
Spain Spain	56%	49%	55%	51%
Switzerland	53%	N/A	N/A	44%
Ireland	51%	N/A	N/A	N/A
Italy	49%	38%	41%	45%
South Africa	46%	41%	39%	38%
Japan	43%	33%	47%	52%
Turkey	42%	36%	30%	27%
Malaysia	37%	34%	37%	38%
Thailand	36%	N/A	N/A	N/A
Chile	35%	39%	30%	27%
Romania	35%	N/A	N/A	N/A
United States	34%	14%	16%	28%
South Korea	33%	27%	30%	31%
Poland	30%	23%	28%	26%
Argentina	25%	25%	28%	24%
Peru	25%	21%	25%	25%
Brazil	24%	23%	17%	19%
Saudi Arabia	23%	15%	17%	21%
Mexico	23%	20%	21%	19%
China	21%	23%	12%	21%
India	18%	17%	19%	22%
Colombia	17%	17%	N/A	22%
Indonesia	16%	N/A	N/A	N/A
United Arab Emirates	14%	N/A	N/A	N/A

Cost of accessing treatment

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

All countries

		2018	2020	2021
Blobal country average	31%	32%	31%	31%
Indonesia	68%	N/A	N/A	N/A
United States	55%	64%	59%	52%
Chile	52%	46%	62%	58%
United Arab Emirates	45%	N/A	N/A	N/A
India	40%	44%	45%	44%
Argentina	39%	35%	34%	40%
Saudi Arabia	39%	32%	41%	35%
Romania	39%	N/A	N/A	N/A
Malaysia Malaysia	38%	49%	42%	41%
Switzerland	38%	N/A	N/A	37%
South Africa	38%	39%	32%	37%
Colombia	37%	37%	N/A	35%
Poland	37%	34%	35%	34%
Turkey	37%	32%	39%	32%
Peru	36%	29%	37%	37%
Belgium	34%	27%	39%	36%
Mexico	33%	26%	36%	40%
Japan	31%	44%	32%	28%
Ireland	30%	N/A	N/A	N/A
China	27%	32%	24%	31%
Thailand	27%	N/A	N/A	N/A
South Korea	26%	32%	27%	25%
Australia	25%	38%	29%	25%
Brazil	25%	18%	22%	24%
Hungary	24%	18%	20%	21%
Netherlands	23%	N/A	26%	24%
France	21%	34%	28%	24%
Italy	19%	28%	20%	18%
Portugal	18%	N/A	N/A	N/A
Germany	16%	19%	17%	17%
Canada	12%	10%	11%	10%
Sweden	9%	11%	11%	11%
Spain	9%	15%	8%	10%
Great Britain	9%	8%	9%	9%

Bureaucracy

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

All countries

		2018	2020	2021
Global country average	26%	26%	26%	26%
Argentina	43%	39%	40%	43%
Mexico	41%	46%	42%	38%
Peru	39%	38%	45%	39%
Romania	38%	N/A	N/A	N/A
Indonesia	38%	N/A	N/A	N/A
Colombia	36%	40%	N/A	36%
Switzerland	32%	N/A	N/A	28%
Italy	31%	33%	34%	35%
Chile	31%	36%	34%	34%
Thailand	31%	N/A	N/A	N/A
Netherlands	30%	N/A	32%	32%
Germany	29%	32%	36%	36%
Sweden	29%	28%	29%	29%
Srazil	28%	26%	28%	31%
Spain Spain	26%	23%	23%	28%
Poland	26%	32%	28%	27%
Ireland	26%	N/A	N/A	N/A
United States	23%	33%	35%	30%
France	22%	20%	25%	23%
Great Britain	21%	26%	28%	23%
China	20%	24%	23%	24%
Canada	20%	21%	25%	23%
Portugal	20%	N/A	N/A	N/A
Australia	18%	19%	23%	21%
Turkey	17%	23%	18%	21%
Hungary	17%	19%	19%	19%
Belgium	16%	20%	20%	20%
Malaysia	16%	17%	17%	19%
South Korea	16%	21%	22%	15%
India	16%	17%	16%	14%
Saudi Arabia	16%	17%	11%	12%
Japan	13%	7%	10%	15%
South Africa	11%	14%	14%	16%
United Arab Emirates	10%	N/A	N/A	N/A

HEALTHCARE CHALLENGES

Q: 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	Chile	China	Colombia	France	Germany	Great Britain	Hungary	India	Indonesia	Ireland	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Portugal	Romania	Saudi Arabia	South Africa	South Korea	Spain	Sweden	Switzerland	Thailand		United Arab Emirates	United States
Access to treatment/ long waiting times	42%	43%	37%	40%	42%	47%	65%	26%	57%	29%	39%	46%	65%	22%	41%	51%	56%	23%	47%	50%	34%	52%	63%	65%	35%	18%	42%	25%	51%	58%	18%	46%	58%	16%	23%
Not enough staff	42%	25%	58%	67%	24%	63%	35%	21%	17%	69%	59%	56%	61%	18%	16%	51%	49%	43%	37%	23%	67%	25%	30%	58%	35%	23%	46%	33%	56%	76%	53%	36%	42%	14%	34%
Cost of accessing treatment	31%	39%	25%	34%	25%	12%	52%	27%	37%	21%	16%	9%	24%	40%	68%	30%	19%	31%	38%	33%	23%	36%	37%	18%	39%	39%	38%	26%	9%	9%	38%	27%	37%	45%	55%
Bureaucracy	25%	43%	18%	16%	28%	20%	31%	20%	36%	22%	29%	21%	17%	16%	38%	26%	31%	13%	16%	41%	30%	39%	26%	20%	38%	16%	11%	16%	26%	29%	32%	31%	17%	10%	23%
Lack of investment in preventative health	22%	35%	16%	18%	43%	18%	27%	23%	40%	18%	18%	19%	23%	22%	17%	17%	20%	16%	16%	36%	14%	42%	22%	46%	28%	15%	23%	17%	32%	13%	11%	11%	14%	14%	17%
Lack of investment	20%	44%	17%	22%	40%	16%	18%	15%	32%	29%	14%	32%	10%	20%	5%	23%	29%	9%	14%	28%	11%	28%	10%	37%	34%	12%	12%	9%	34%	11%	8%	8%	13%	16%	8%
Ageing population	19%	4%	27%	28%	6%	29%	7%	46%	6%	26%	22%	27%	12%	17%	3%	17%	20%	52%	14%	5%	30%	2%	24%	27%	11%	17%	5%	51%	22%	17%	31%	15%	11%	13%	15%
Poor quality treatment	17%	8%	8%	6%	29%	7%	18%	13%	24%	6%	11%	9%	22%	30%	34%	14%	15%	4%	19%	21%	7%	26%	35%	5%	28%	18%	44%	5%	8%	11%	11%	23%	27%	16%	17%
Poor safety	9%	10%	7%	4%	9%	7%	13%	15%	10%	5%	6%	5%	5%	13%	7%	7%	7%	7%	11%	9%	4%	10%	6%	5%	6%	16%	6%	9%	7%	5%	7%	16%	8%	16%	13%
Lack of choice	9%	8%	5%	5%	11%	4%	7%	14%	9%	8%	4%	4%	4%	22%	11%	6%	7%	5%	12%	13%	3%	11%	6%	0%	6%	9%	12%	9%	7%	6%	6%	15%	20%	13%	6%
Low standards of cleanliness	7%	4%	4%	4%	7%	3%	3%	10%	3%	5%	7%	5%	12%	25%	14%	5%	6%	1%	13%	7%	3%	7%	5%	1%	21%	12%	20%	3%	4%	2%	3%	8%	7%	11%	4%
Other	2%	1%	3%	3%	1%	3%	3%	1%	2%	2%	3%	4%	3%	1%	2%	2%	2%	2%	3%	2%	3%	2%	2%	3%	1%	3%	2%	2%	2%	4%	4%	2%	2%	5%	5%

Base: 23,507 online adults in 34 countries, 22 July – 5 August 2022.

Online samples in Brazil, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates are more urban, more educated, and/or more affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.



METHODOLOGY

These are the results of a 34-market survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 23,507 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, 20-74 year olds in Thailand, 21-74 in Indonesia, and 16-74 year olds in 27 other markets between Friday, July 22 and Friday, August 5, 2022.

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

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, Portugal, Romania, 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, Chile, mainland China, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, Thailand, Turkey, and United Arab Emirates 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.

