



Ipsos Health Policy Institute

Tracking Healthcare as a Priority Issue (Spring 2014)

A Twenty-Four Country Comparison and Drill-Down into Canada, US, UK, Australia and France



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Ipsos Public Affairs

The Social Research and Corporate Reputation Specialists

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OVERVIEW

This report...

Ipsos Public Affairs has been tracking the top issue concerns of residents across 24 countries since 2010. This report is the first of a bi-annual series that will be provided by the Ipsos Health Policy Institute focusing on “healthcare” as an issue priority.

Priority attributed to healthcare as an issue varies by country. It ranks with a higher focus among residents in Poland, the US, Canada and Australia than it does among residents in Germany, France, Italy, Argentina and Japan.

Demographics come into play in the priority assigned to healthcare in some countries, but not in others. Women rate healthcare as a higher priority than men in each of the US and Australia, but less so in Canada, France and the UK. Similarly, rating of healthcare as a priority issue increases with age in Canada, the UK and Australia but less so in the US and France. When comparing across countries on ratings based on income and education there are no obvious trends or similarities.

Of interest, when exploring other social/political issues such as the environment or poverty/inequality, we have often found that people who are active online tend to rate these issues as more important than those who are less active online. When comparing online activity and rating healthcare as important, online activity regarding social/political issues is not a factor in differentiating opinion.



The Ipsos Public Affairs Health Policy Institute is a major international player in the healthcare policy, service delivery and patient experience measurement field.

The Institute works with clients to develop and implement consultation and research initiatives that measure the quality and impact of health care policy and service delivery on a variety of levels:

TOPICS / AREAS

- Policy Development, Implementation
- Program Evaluation, Impact Assessment, Performance Measurement
- Communications, Advertising
- Behaviour Change
- Public Opinion, Reputation Assessment
- Patient Experience
- Social Marketing

AUDIENCES

- Citizens as Taxpayers, Consumers, Patients, Advocates
- Healthcare Professionals, Providers
- Government , Insurance Companies and other Payors
- Health Care Facilities
- Provider Organizations, Associations
- Foundations, Charities

ENVISIONING HEALTH AS HOLISTIC – PHYSICAL, MENTAL, SOCIAL



Worldwide and Comparing Countries



15 of the countries in this reporting are those where our sampling and weighting protocols allow us to be reasonably confident that the data represent the general public. These countries are:

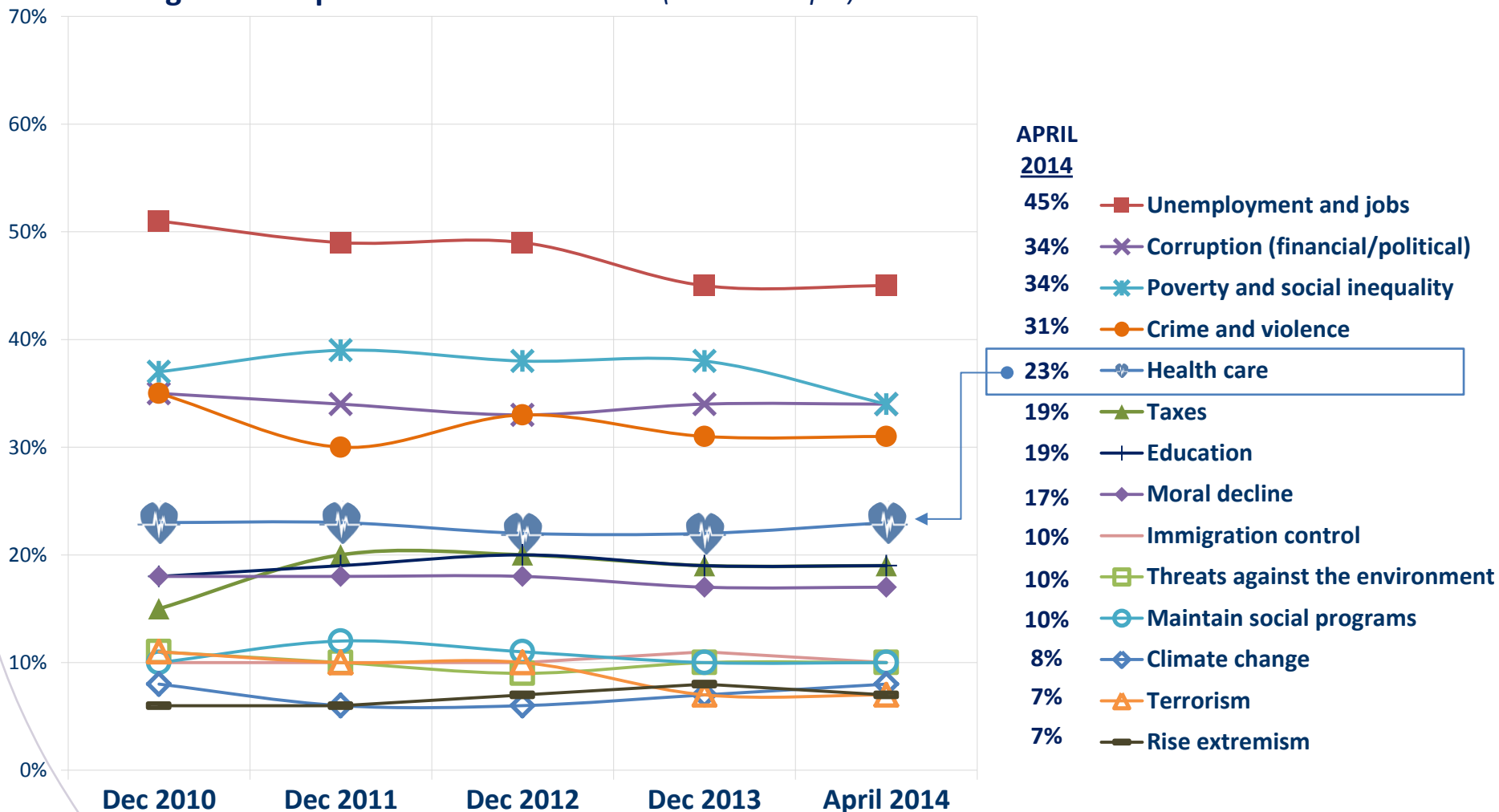
- Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, United Kingdom and United States.

For the nine remaining countries surveyed, our sampling and weighting protocols only allow us to conclude that the data represent “Upper Deck Consumer Citizens;” more urban/educated/higher income than their fellow citizens. These countries are:

- Brazil, China, India, Indonesia, Mexico, Russia, Saudi Arabia, South Africa and Turkey.

Healthcare ranks in the middle of the pack as a top issue concern worldwide, behind unemployment/jobs, poverty/social inequality, corruption and crime/violence.

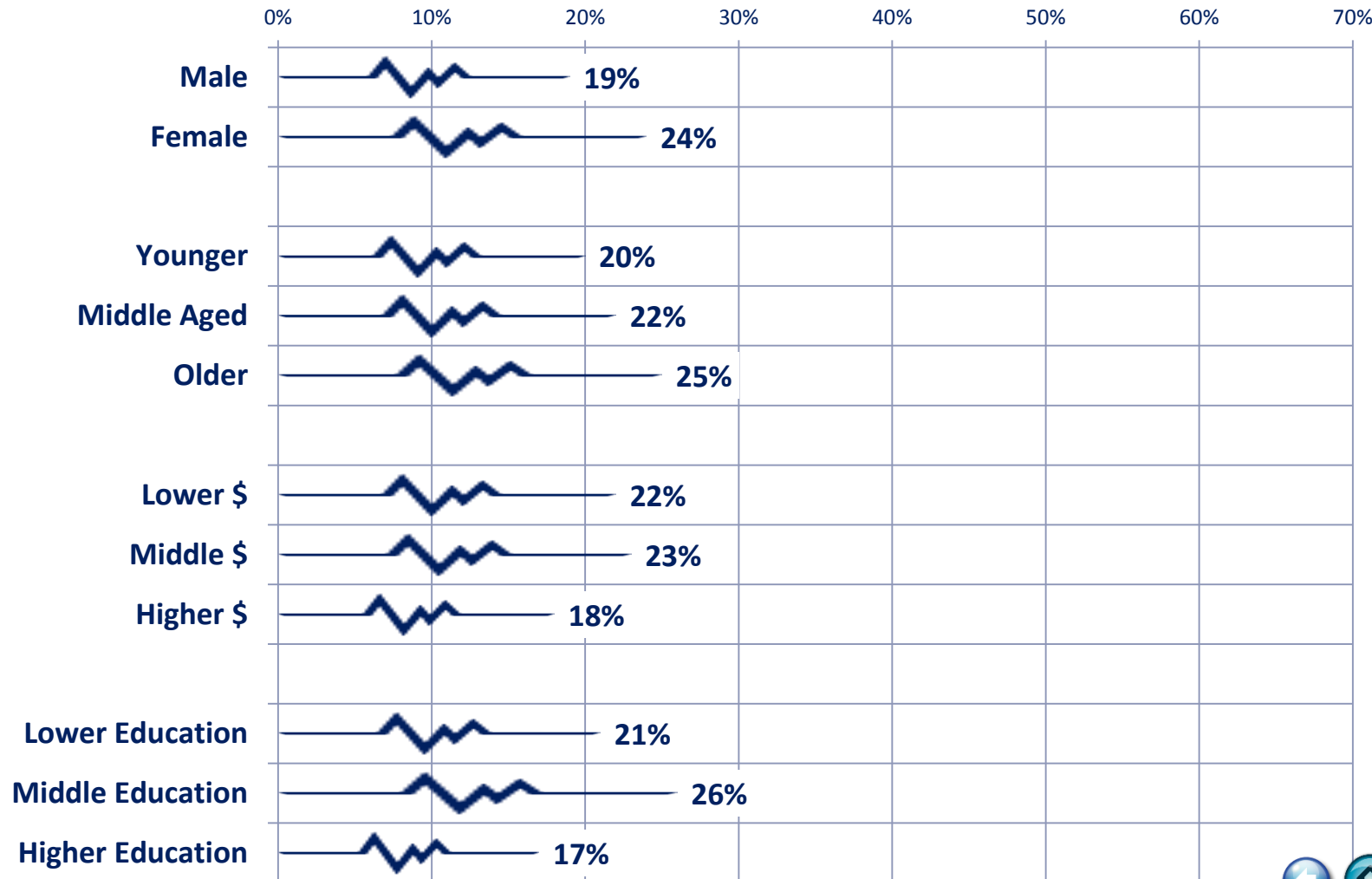
Tracking Select Top Issues – WORLDWIDE (% rate in top 3)



Worldwide, women, older, lower/middle education and lower/middle income tend to have a higher proportion identifying healthcare as a priority issue. The US, UK and Australia specifically fit this demographic profile.



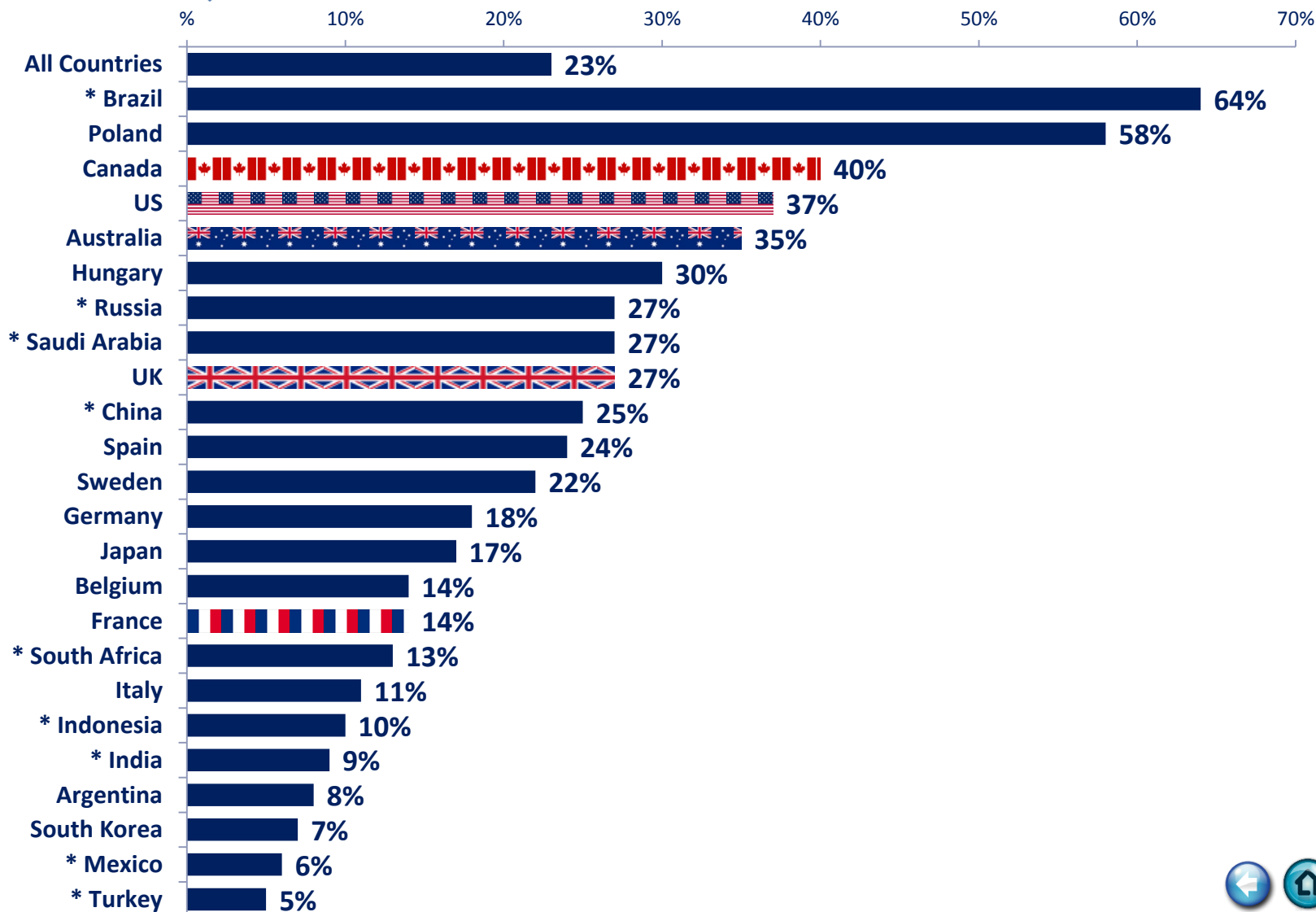
Healthcare As a Top Issue by Select Demographics Worldwide (% rate in top 3)



Healthcare ranks much higher as a priority issue in Brazil, Poland, the US, Canada and Australia than elsewhere.



Healthcare As a Top Issue by Country (*% rate in top 3*)

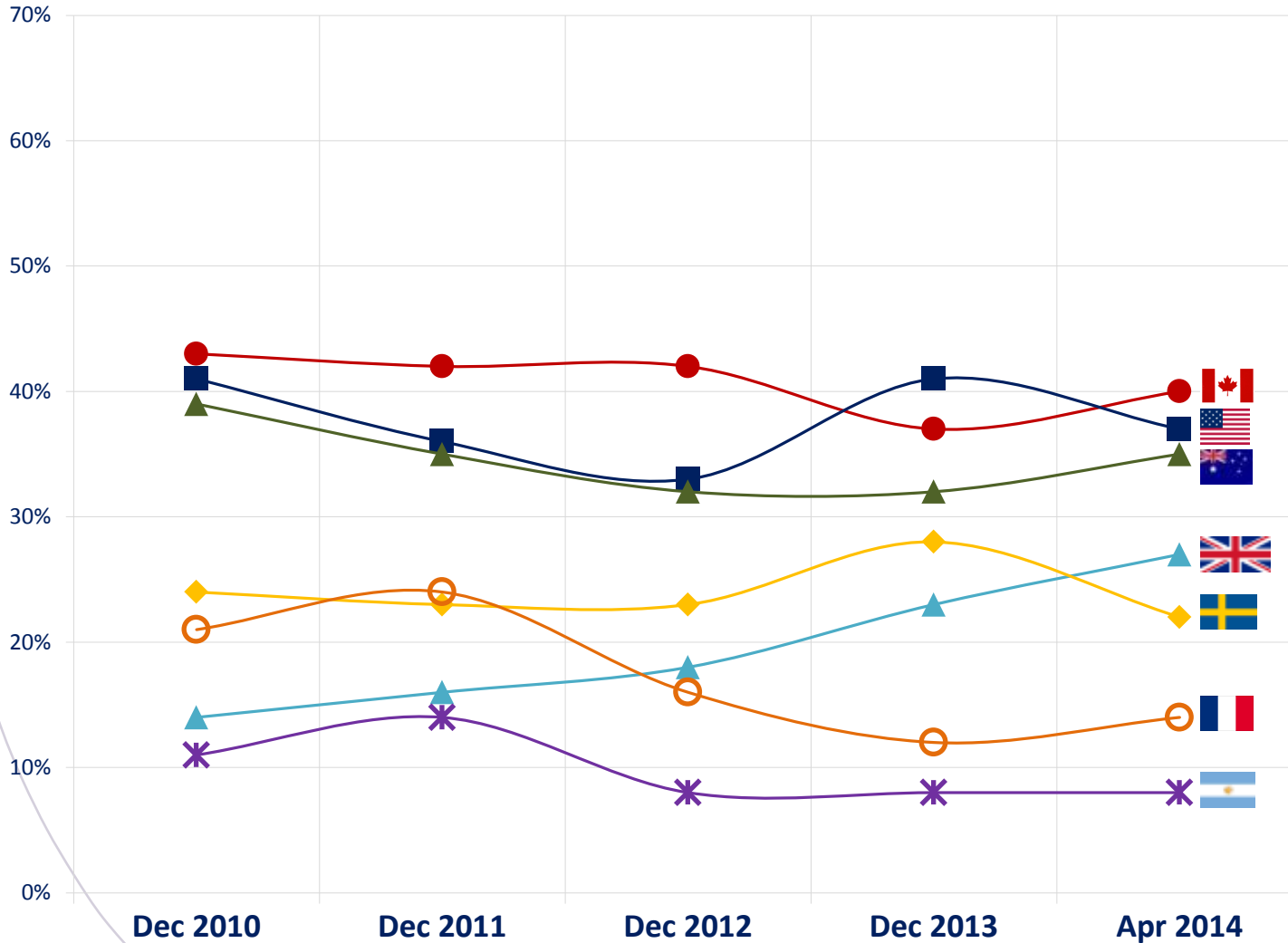


* Countries where the data are "Upper Deck Citizens/Consumers," not general population

Tracking among select countries, identification of healthcare as a top priority has trended down in France and Argentina recently, but has trended up in the UK.



Tracking Healthcare As a Top Issue by Select Countries (% rate in top 3)



APRIL
2014

- 40% ● Canada
- 37% ■ US
- 35% ▲ Australia
- 27% ▲ UK
- 22% ◆ Sweden
- 14% ○ France
- 8% * Argentina

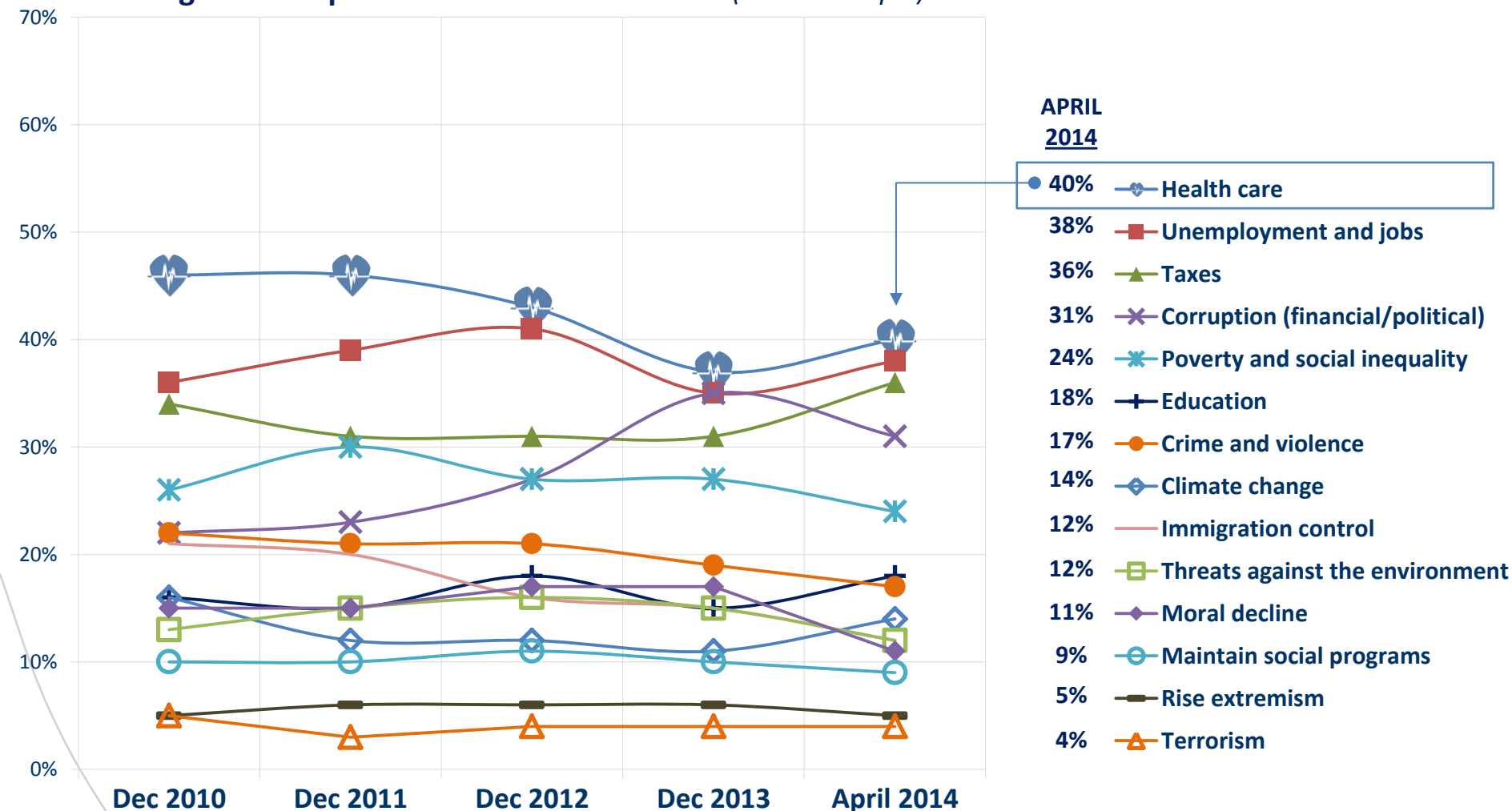


Focus on
CANADA



While still high on the public agenda, healthcare is not the dominant concern that it once was among Canadians. It is competing for top spot with unemployment/jobs and taxes.

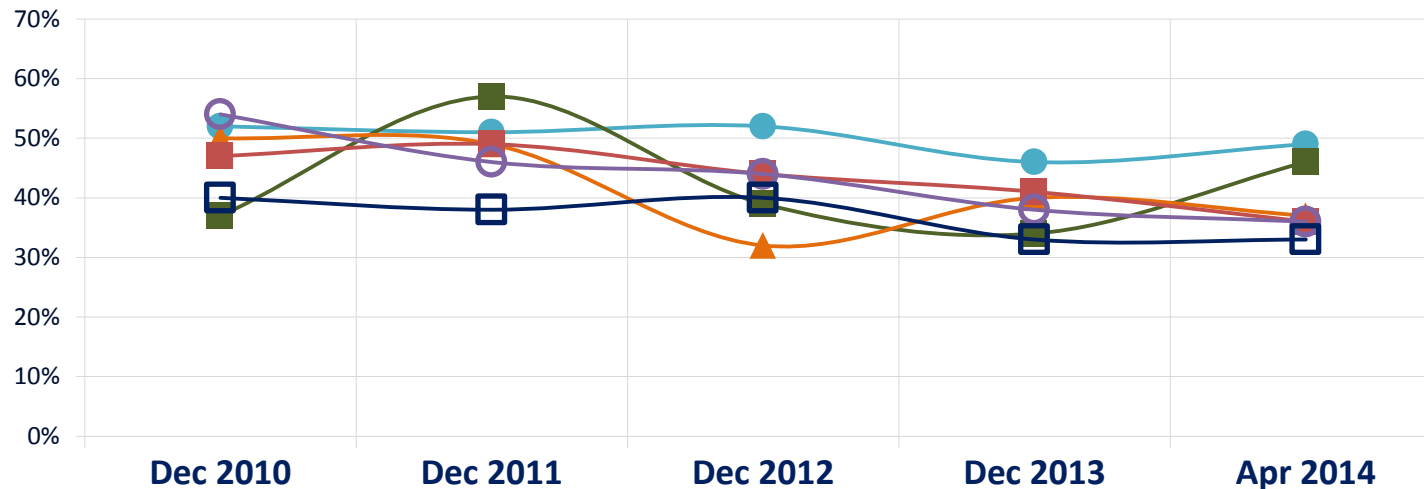
Tracking Select Top National Issues – CANADA (% rate in top 3)



Healthcare tracks as a higher issue priority in Quebec and BC, and lowest in Ontario. It does not differ by online activity on social/political issues.



Tracking Healthcare as an Issue by **REGION** (% rate in top 3)



APRIL 2014

- 49% — Quebec
- 46% — BC
- 37% — Prairies
- 36% — Atlantic
- 36% — Alberta
- 33% — Ontario

Tracking Healthcare as an Issue by **ONLINE ACTIVITY RE SOCIAL/POLITICS** (% rate in top 3)



INACTIVE: Not done anything online past month re social, political issues

PASSIVE: Have only read what others have posted online past month re social, political issues

ACTIVE: Have shared links, commented, written original ideas online in past month re social, political issues

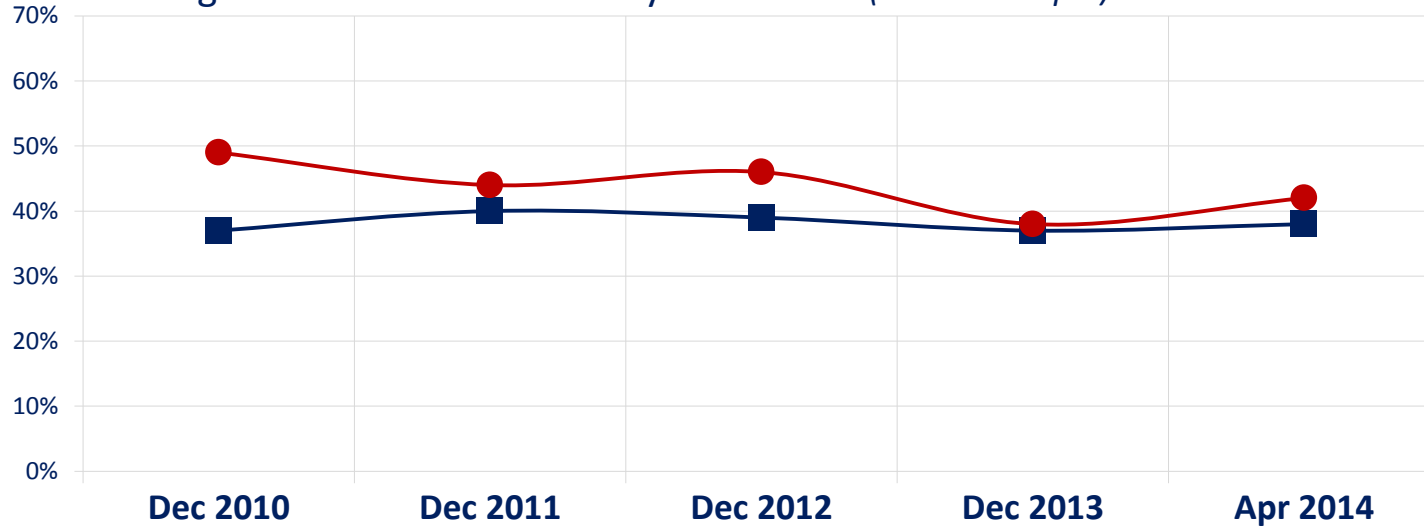
APRIL 2014

- 43% — Inactive
- 40% — Passive
- 37% — Active



Men and women have become almost identical in their rating of the importance of healthcare. It continues to track higher among the middle-aged and older.

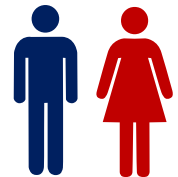
Tracking Healthcare as an Issue by **GENDER** (% rate in top 3)



APRIL 2014

38% — Men

42% — Women



Tracking Healthcare as an Issue by **AGE** (% rate in top 3)



APRIL 2014

32% — Younger

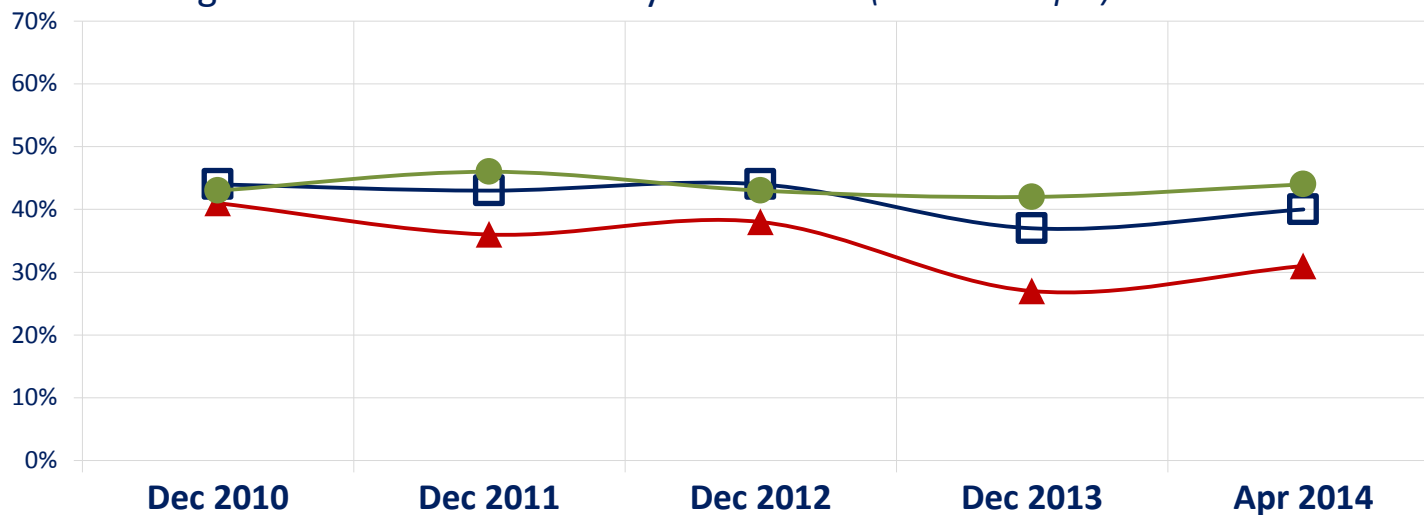
44% — Middle-Aged

46% — Older



Education is not a differentiating factor in rating of the importance of healthcare. However, income comes into play, with importance increasing as income increases.

Tracking Healthcare as an Issue by **INCOME** (% rate in top 3)

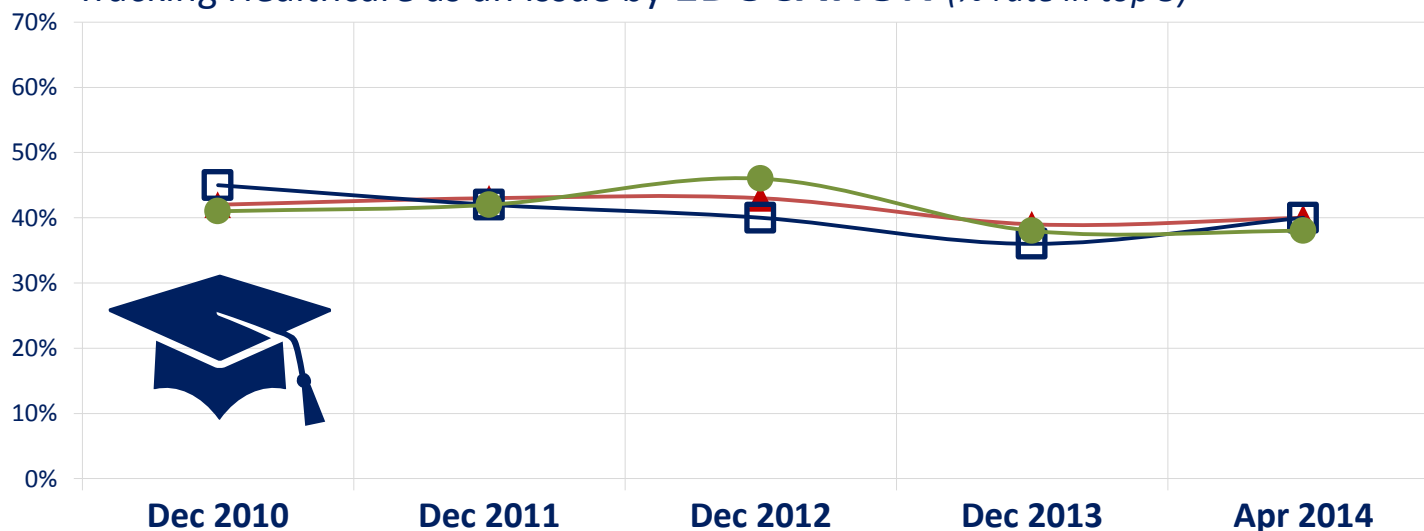


APRIL
2014



31% Lower \$
40% Middle \$
44% Higher \$

Tracking Healthcare as an Issue by **EDUCATION** (% rate in top 3)



APRIL
2014

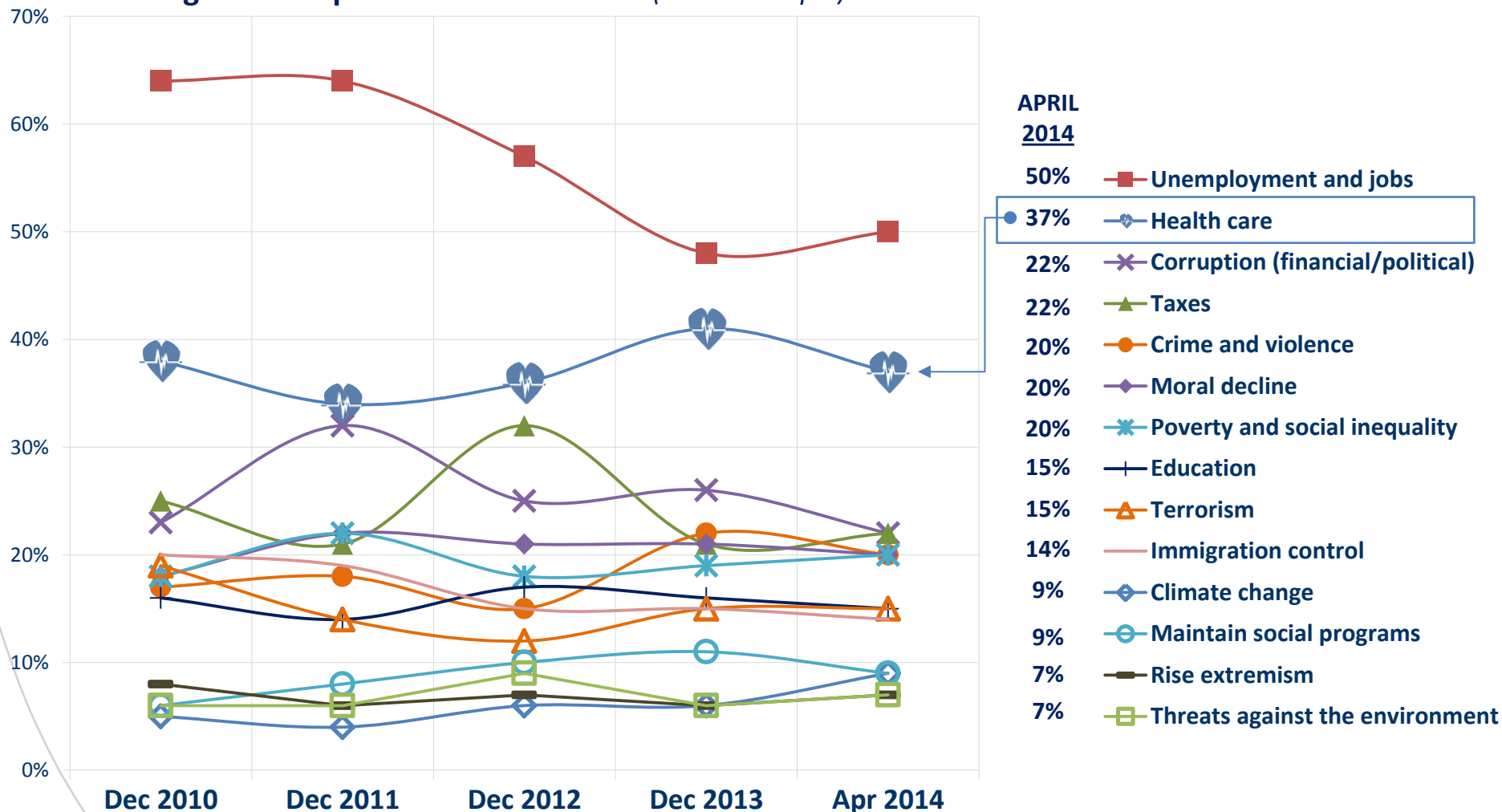
40% Lower Ed.
40% Middle Ed.
38% Higher Ed.



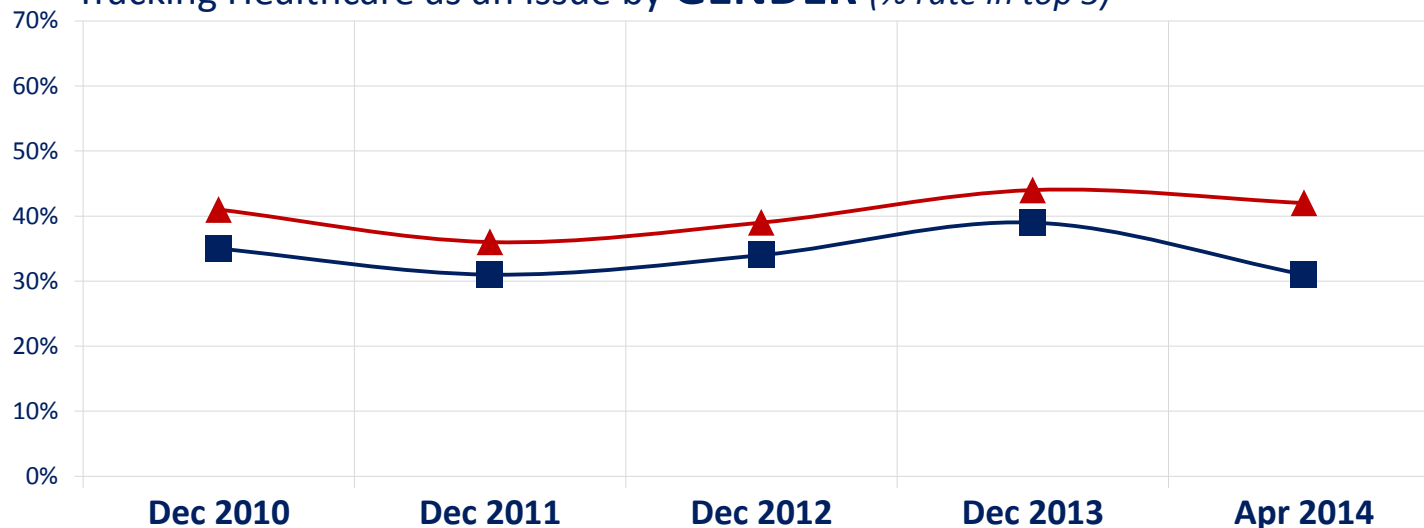
Focus on the **UNITED STATES**



Tracking Select Top National Issues – US (% rate in top 3)



Tracking Healthcare as an Issue by **GENDER** (% rate in top 3)

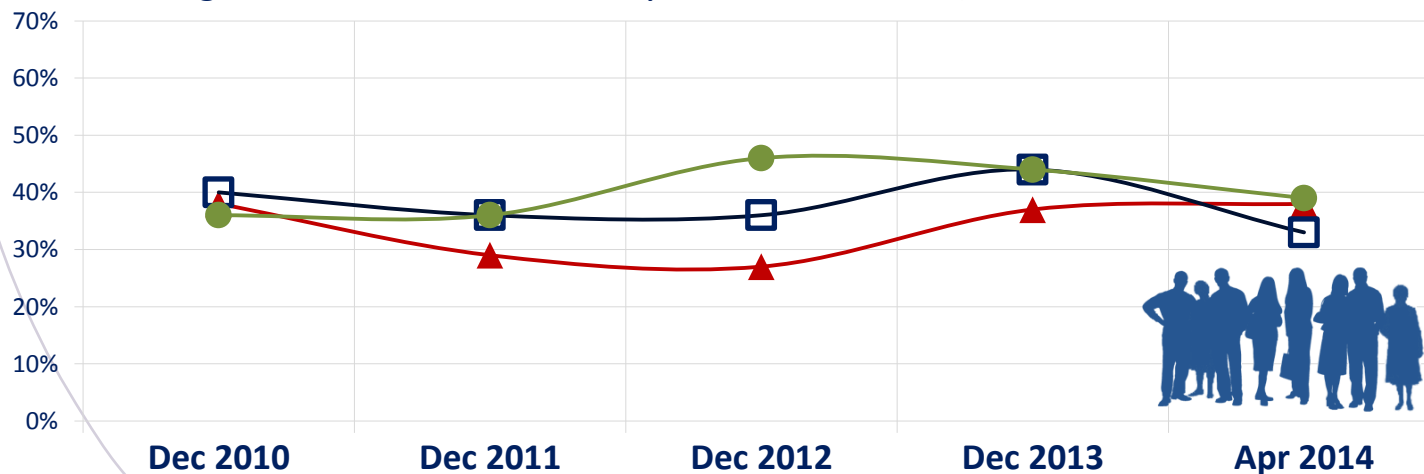


APRIL 2014

31% — Men
42% — Women



Tracking Healthcare as an Issue by **AGE** (% rate in top 3)



APRIL 2014

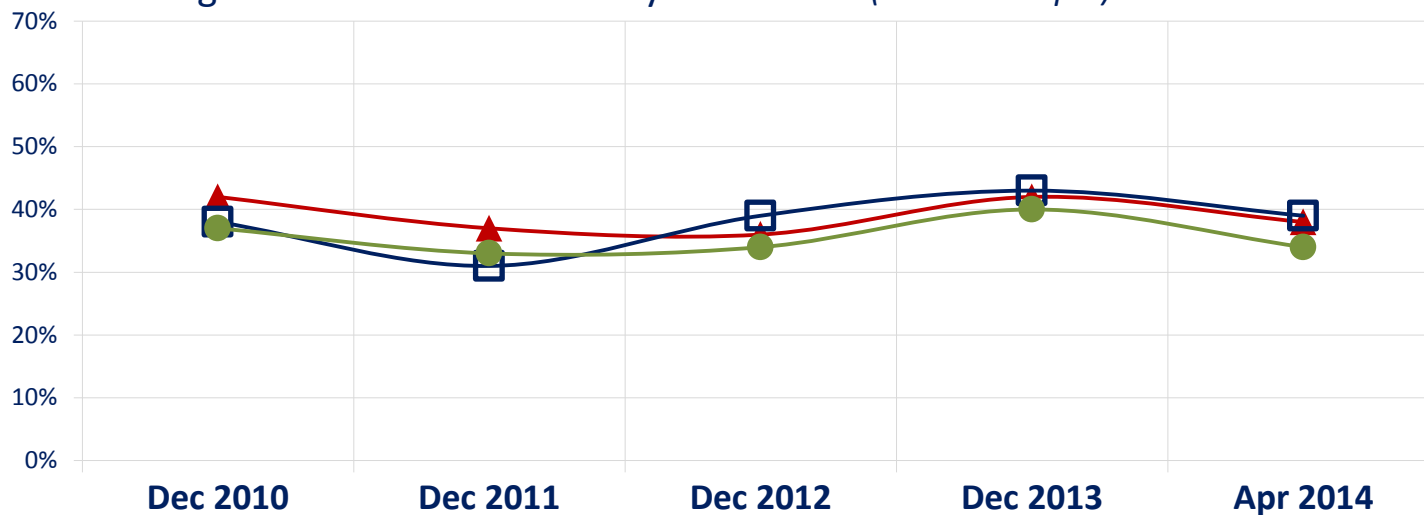
38% — Younger
33% — Middle-aged
39% — Older



Income is not a big factor in rating of the importance of healthcare. However, education comes a bit more into play, with importance increasing as education decreases.



Tracking Healthcare as an Issue by **INCOME** (% rate in top 3)

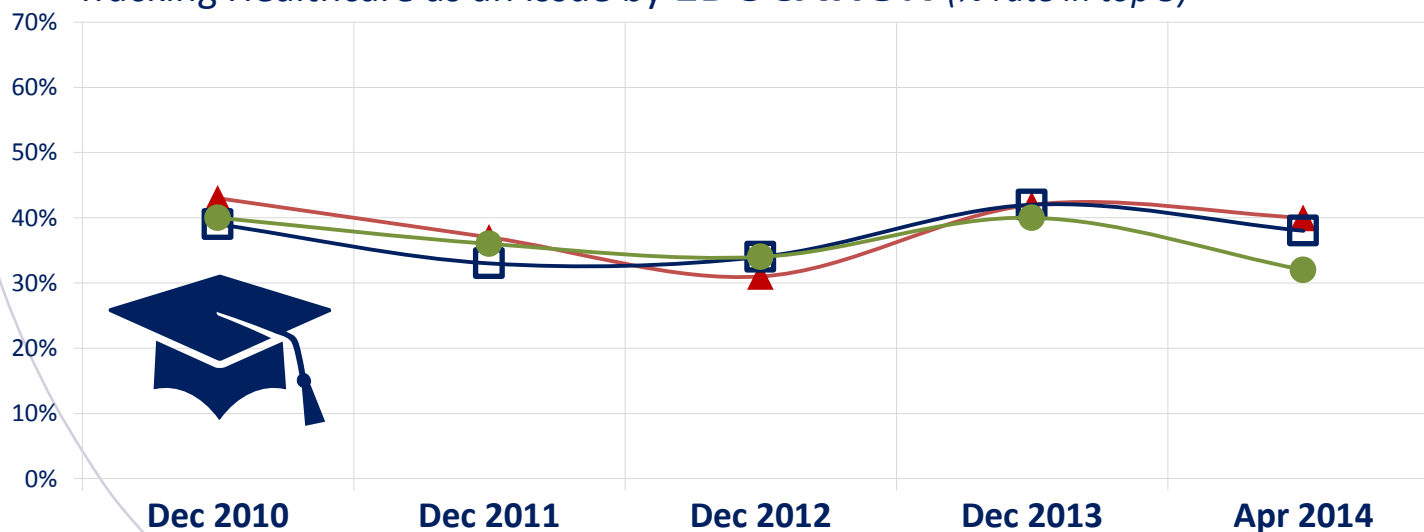


APRIL 2014



38% Lower \$
39% Middle \$
34% Higher \$

Tracking Healthcare as an Issue by **EDUCATION** (% rate in top 3)



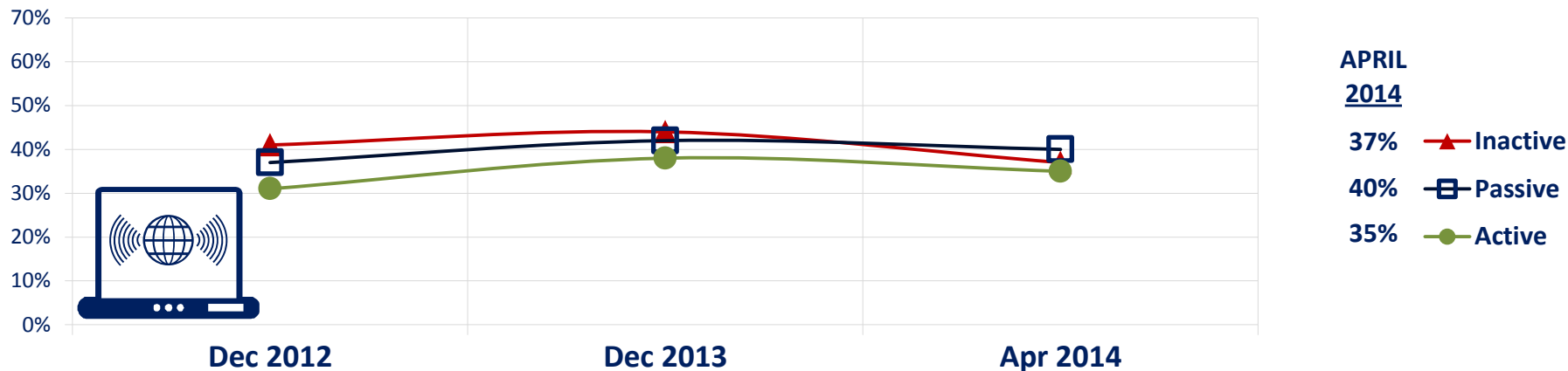
APRIL 2014



40% Lower Ed.
38% Middle Ed.
32% Higher Ed.



Tracking Healthcare as an Issue by **ONLINE ACTIVITY RE SOCIAL/POLITICS** (% rate in top 3)



INACTIVE: Not done anything online past month re social, political issues

PASSIVE: Have only read what others have posted online past month re social, political issues

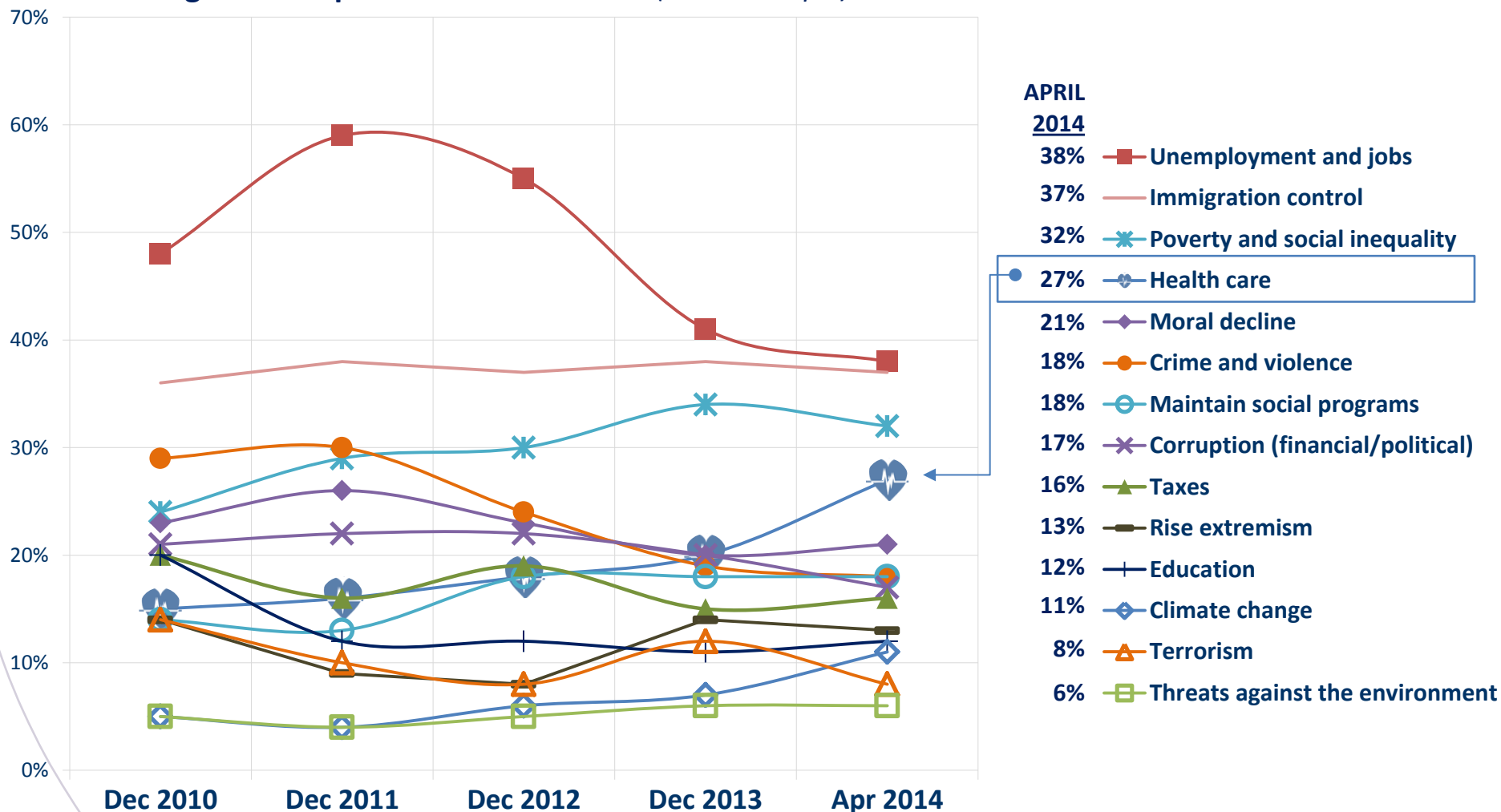
ACTIVE: Have shared links, commented, written original ideas online in past month re social, political issues

Focus on the
UK

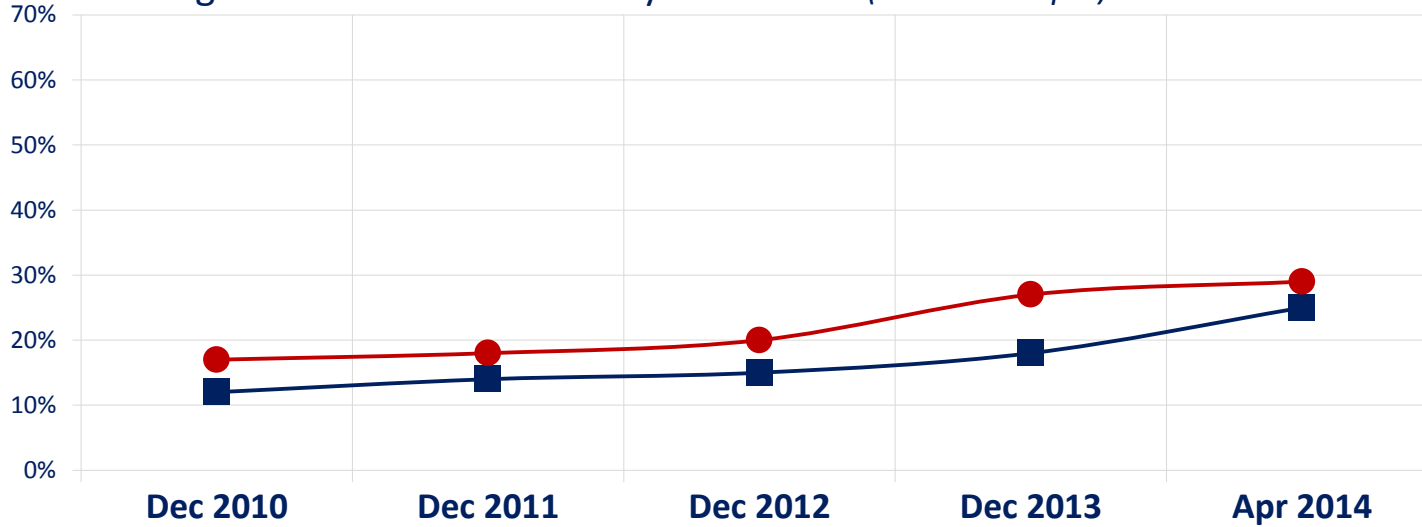


Healthcare has grown as a priority issue in the UK over the past four years. It currently ranks fourth behind unemployment/jobs, immigration control and poverty/social inequality.

Tracking Select Top National Issues – UK (% rate in top 3)

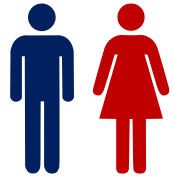


Tracking Healthcare as an Issue by **GENDER** (% rate in top 3)

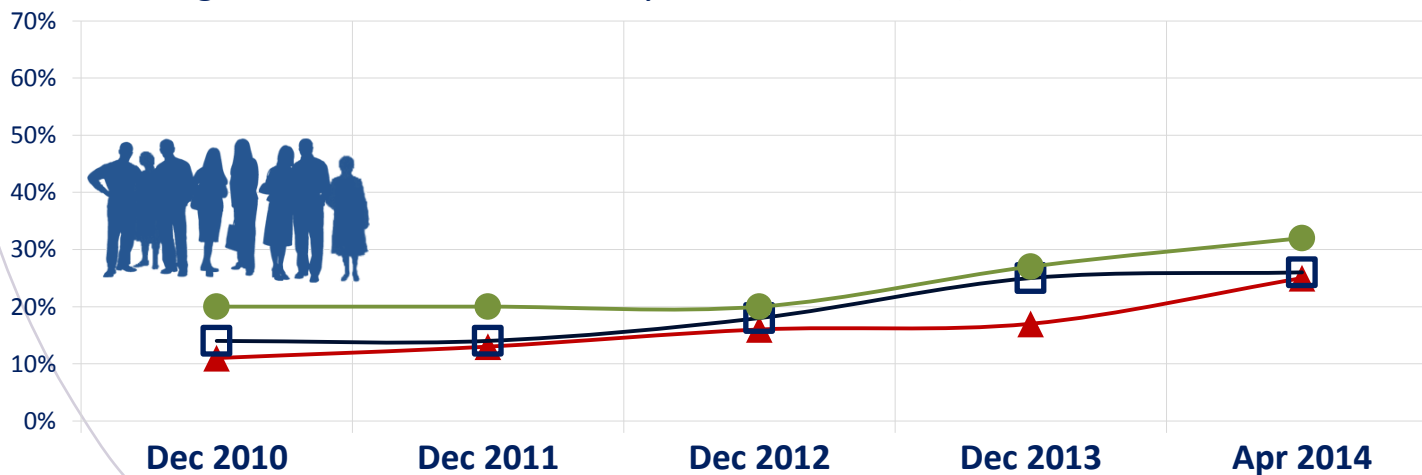


APRIL
2014

25% — Men
29% — Women



Tracking Healthcare as an Issue by **AGE** (% rate in top 3)



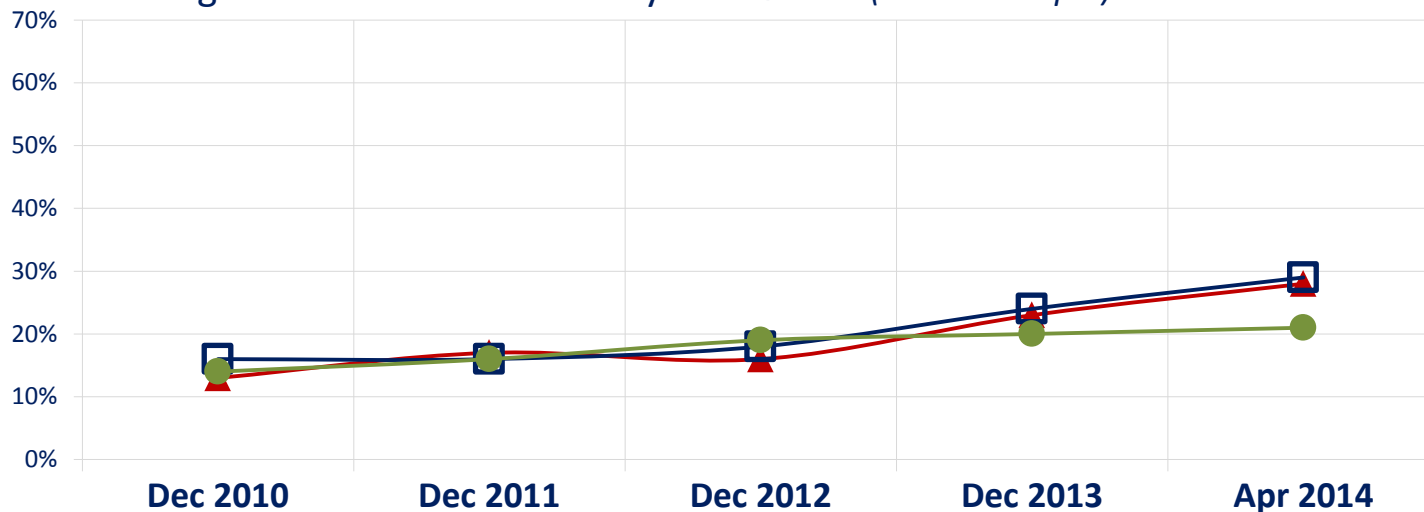
APRIL
2014

25% — Younger
26% — Middle-aged
32% — Older



Middle and lower income households give marginally higher ratings to healthcare as a priority than higher income households. The highest educated also tend to posit marginally higher importance ratings.

Tracking Healthcare as an Issue by **INCOME** (% rate in top 3)

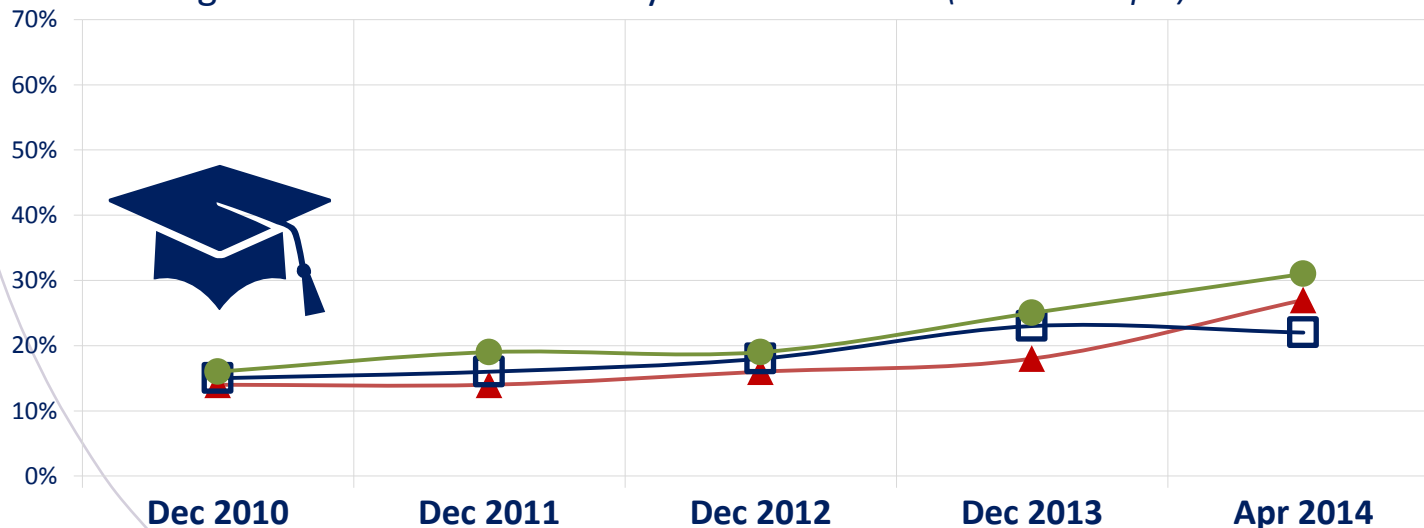


APRIL
2014



28% Lower \$
29% Middle \$
21% Higher \$

Tracking Healthcare as an Issue by **EDUCATION** (% rate in top 3)

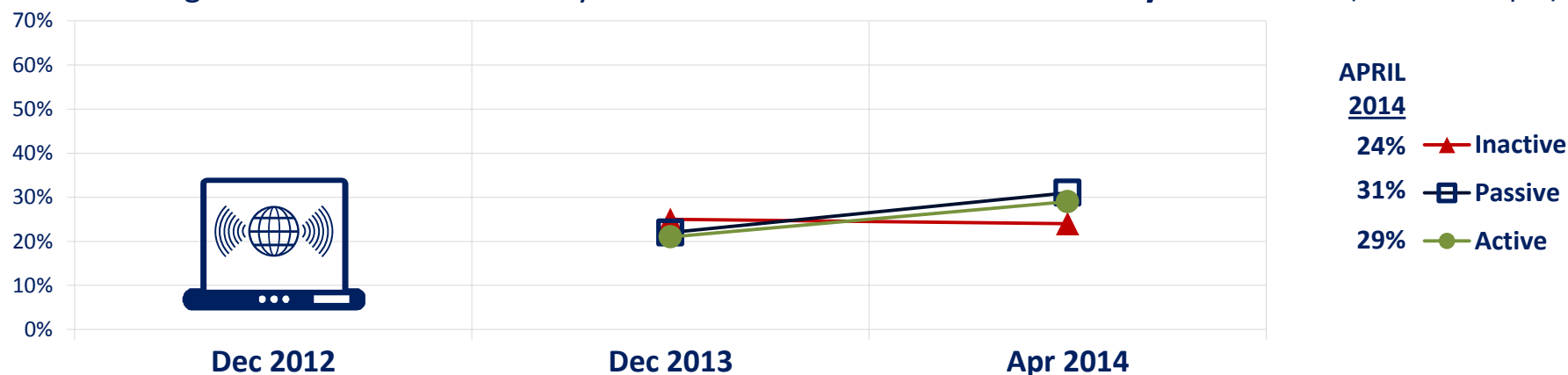


APRIL
2014

27% Lower Ed.
22% Middle Ed.
31% Higher Ed.



Tracking Healthcare as an Issue by **ONLINE ACTIVITY RE SOCIAL/POLITICS** (% rate in top 3)



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PASSIVE: Have only read what others have posted online past month re social, political issues

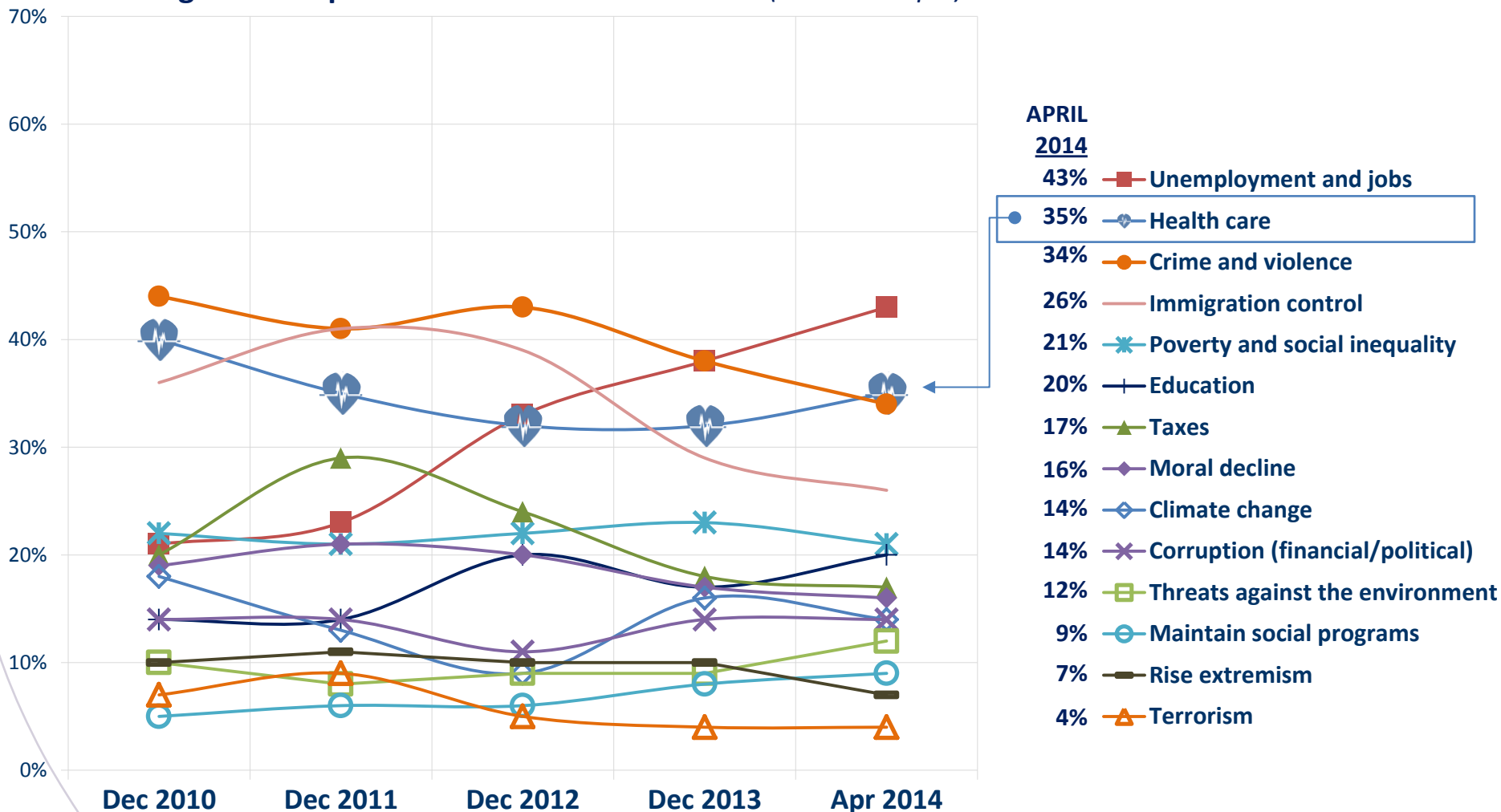
ACTIVE: Have shared links, commented, written original ideas online in past month re social, political issues

Focus on **AUSTRALIA**

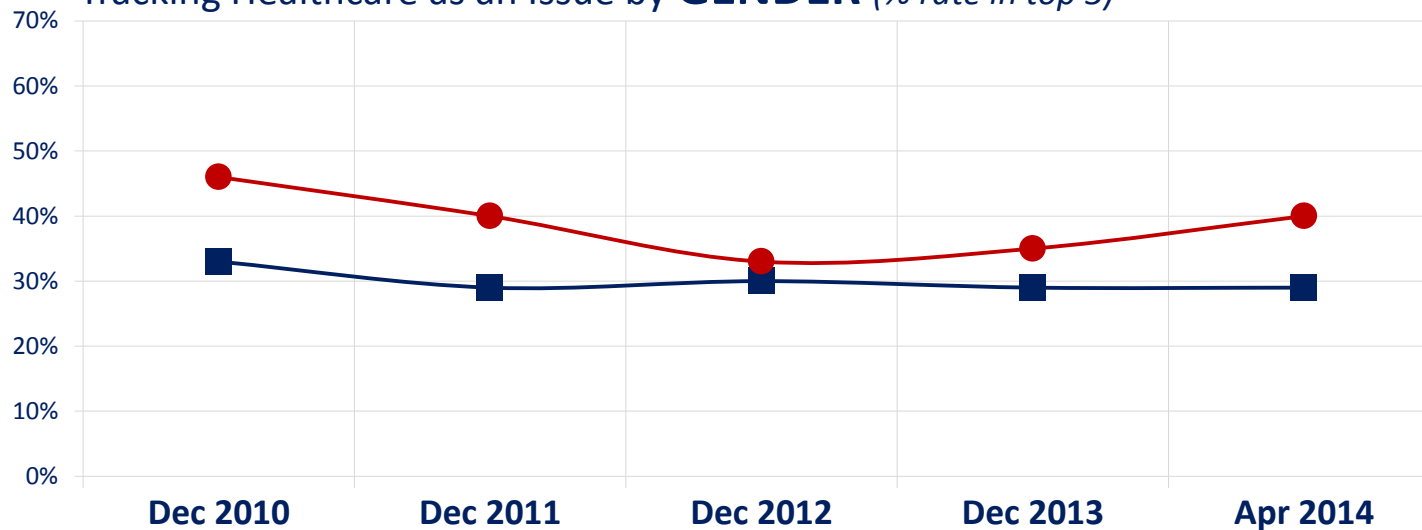


Healthcare ranks second alongside crime/violence, behind unemployment/jobs, as a priority issue among Australians.

Tracking Select Top National Issues – AUSTRALIA (% rate in top 3)



Tracking Healthcare as an Issue by **GENDER** (% rate in top 3)



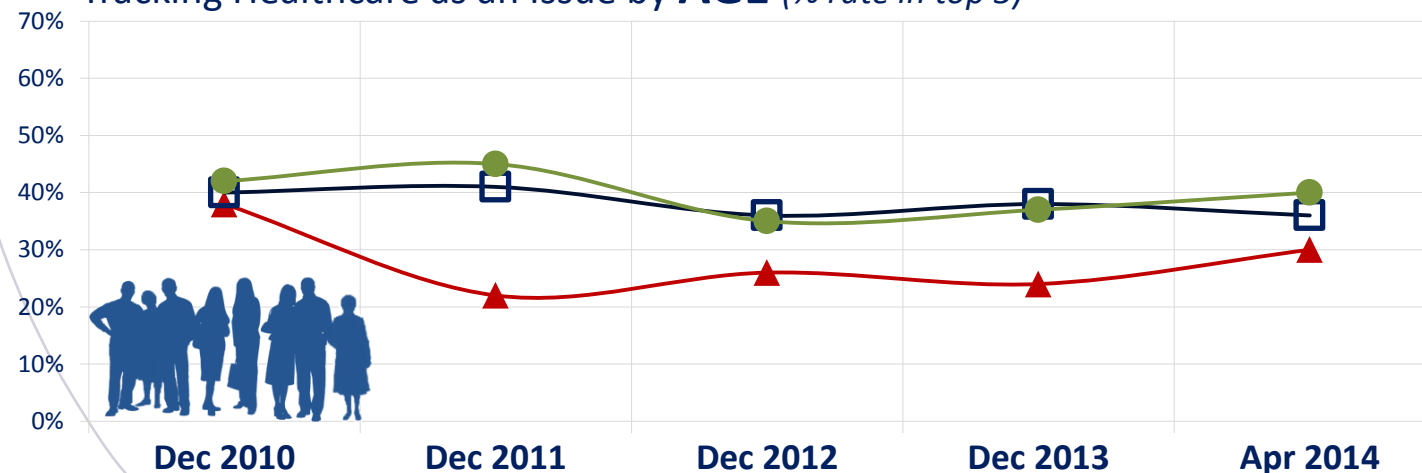
APRIL
2014

29% — Men

40% — Women



Tracking Healthcare as an Issue by **AGE** (% rate in top 3)



APRIL
2014

30% — Younger

36% — Middle-aged

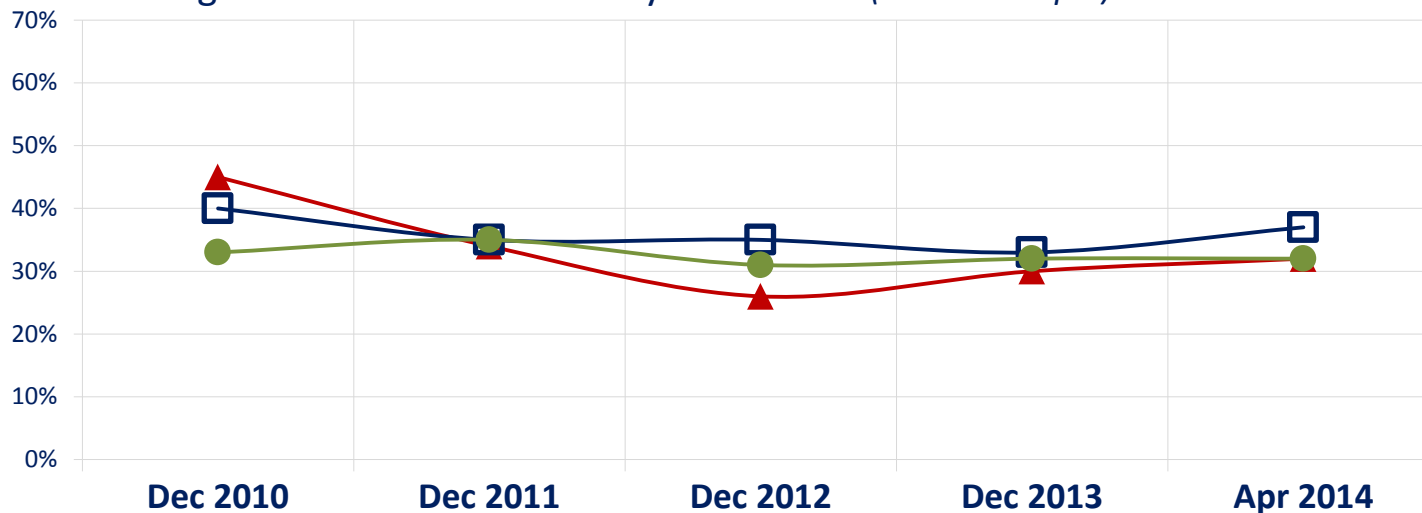
40% — Older



Education and income do not differentiate importance associated with healthcare to any significant degree, although middle-income and middle-education tend to rate it highest.



Tracking Healthcare as an Issue by **INCOME** (% rate in top 3)

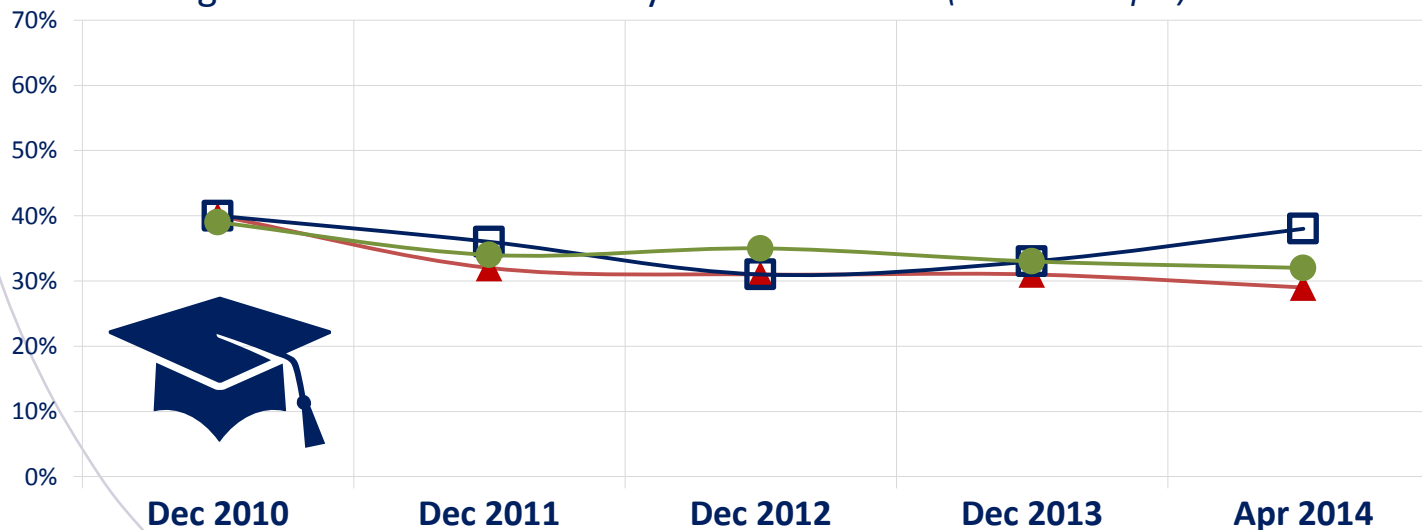


APRIL
2014



32% Lower \$
37% Middle \$
32% Higher \$

Tracking Healthcare as an Issue by **EDUCATION** (% rate in top 3)

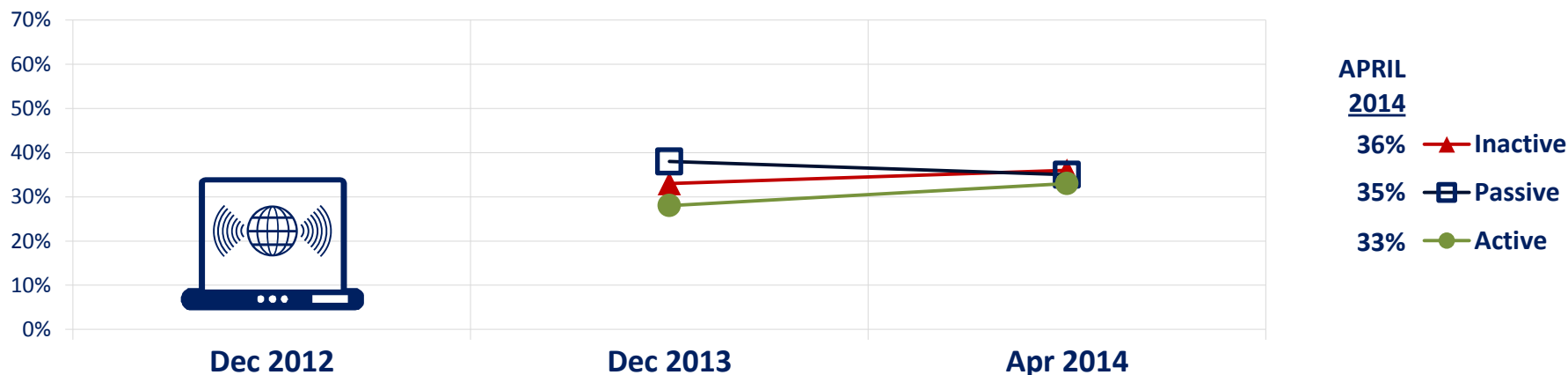


APRIL
2014

29% Lower Ed.
38% Middle Ed.
32% Higher Ed.



Tracking Healthcare as an Issue by **ONLINE ACTIVITY RE SOCIAL/POLITICS** (% rate in top 3)



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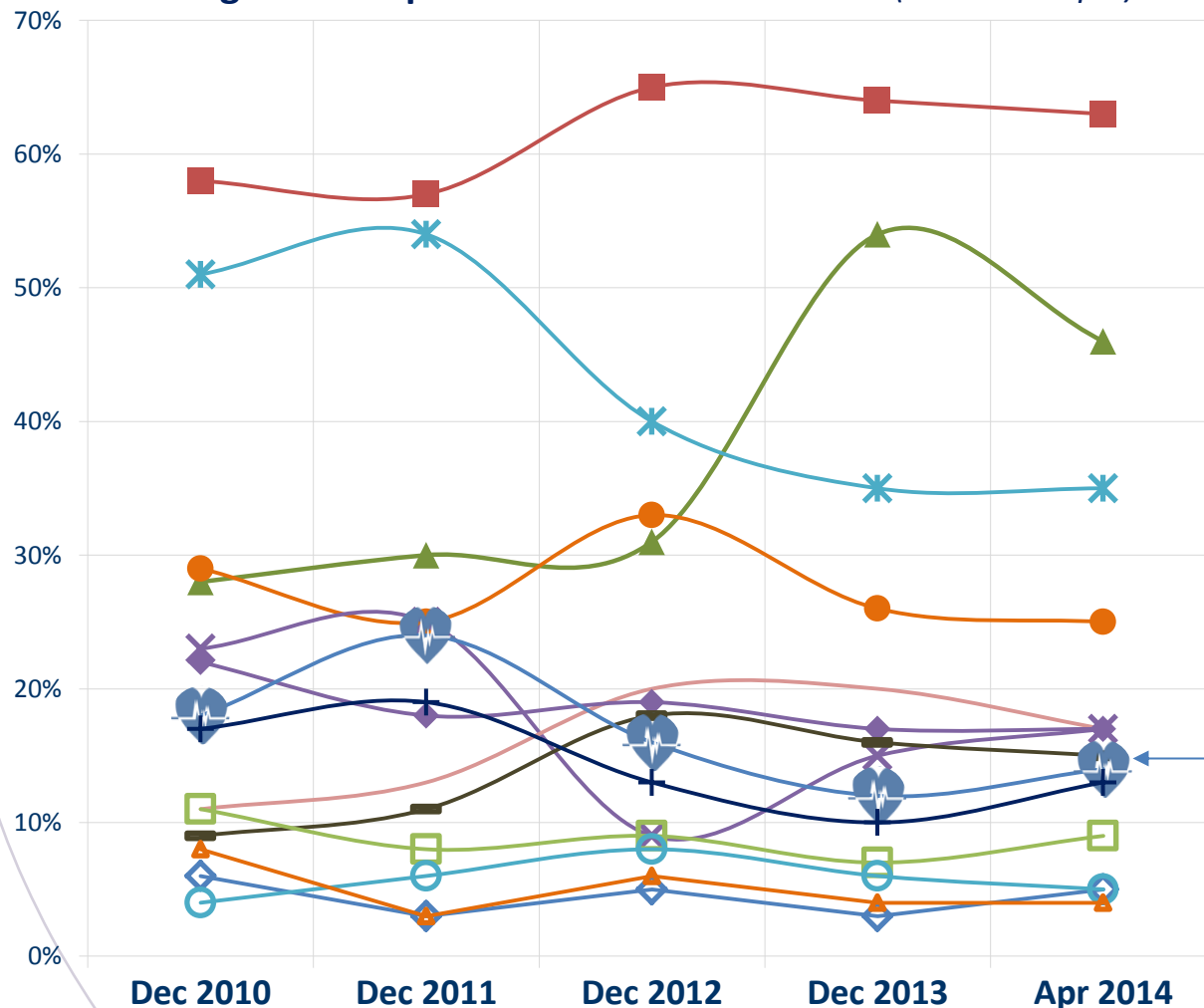
Focus on **FRANCE**



Healthcare ranks well down the list of issue priorities in France. The public agenda is dominated by economic issues.



Tracking Select Top National Issues – FRANCE (% rate in top 3)



APRIL
2014

63% — Unemployment and jobs

46% — Taxes

35% — Poverty and social inequality

25% — Crime and violence

17% — Corruption (financial/political)

17% — Immigration control

17% — Moral decline

15% — Rise extremism

14% — Health care

13% — Education

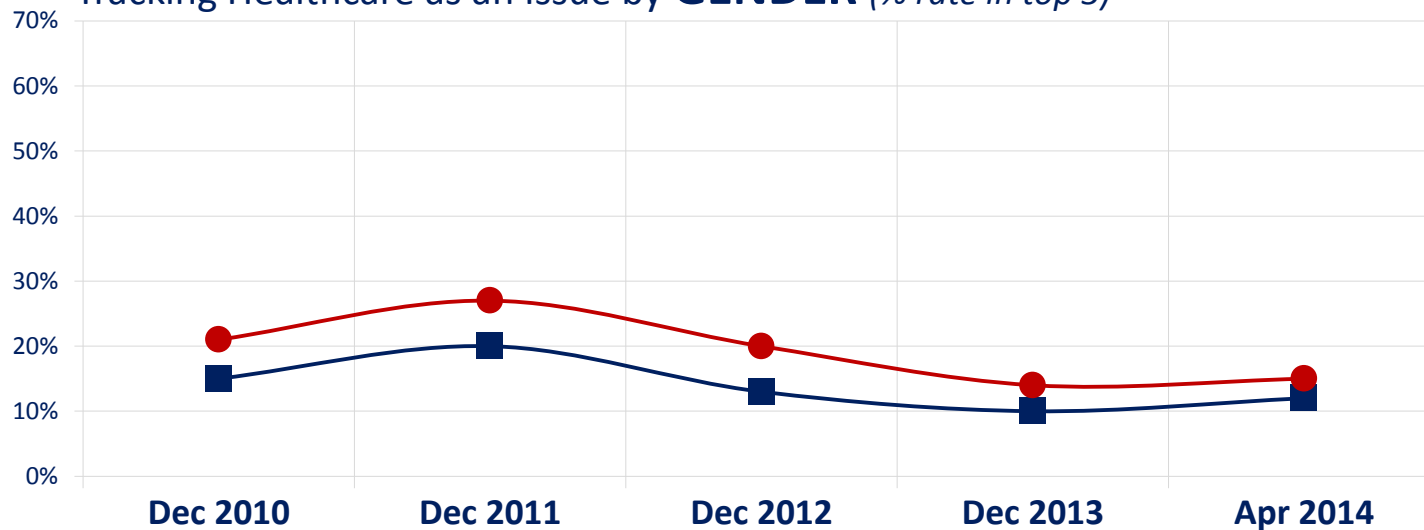
9% — Threats against the environment

5% — Climate change

5% — Maintain social programs

4% — Terrorism

Tracking Healthcare as an Issue by **GENDER** (% rate in top 3)



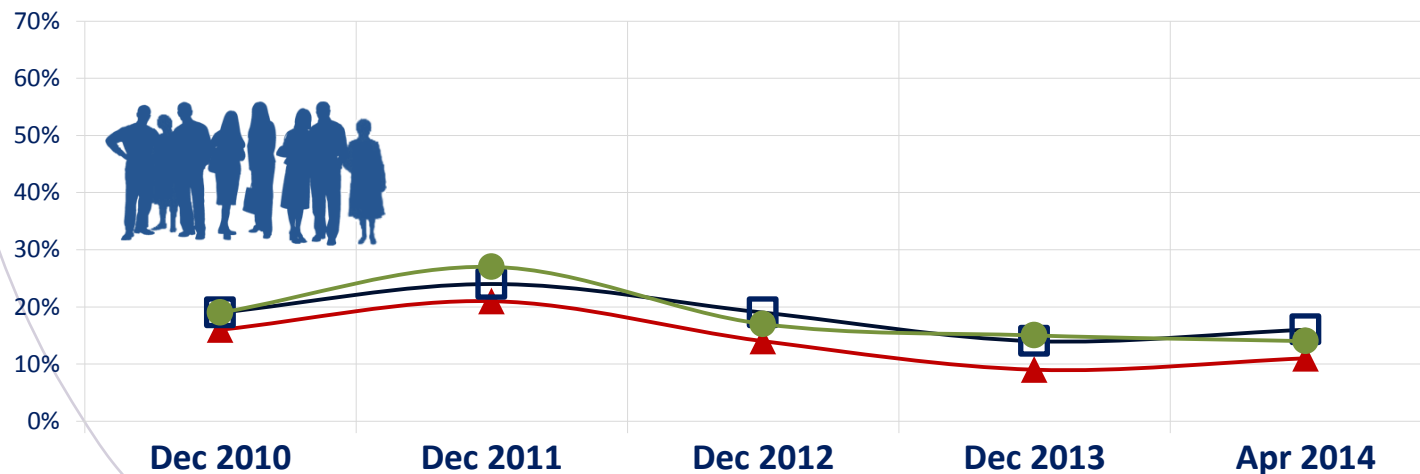
**APRIL
2014**

12% — Men

15% — Women



Tracking Healthcare as an Issue by **AGE** (% rate in top 3)



**APRIL
2014**

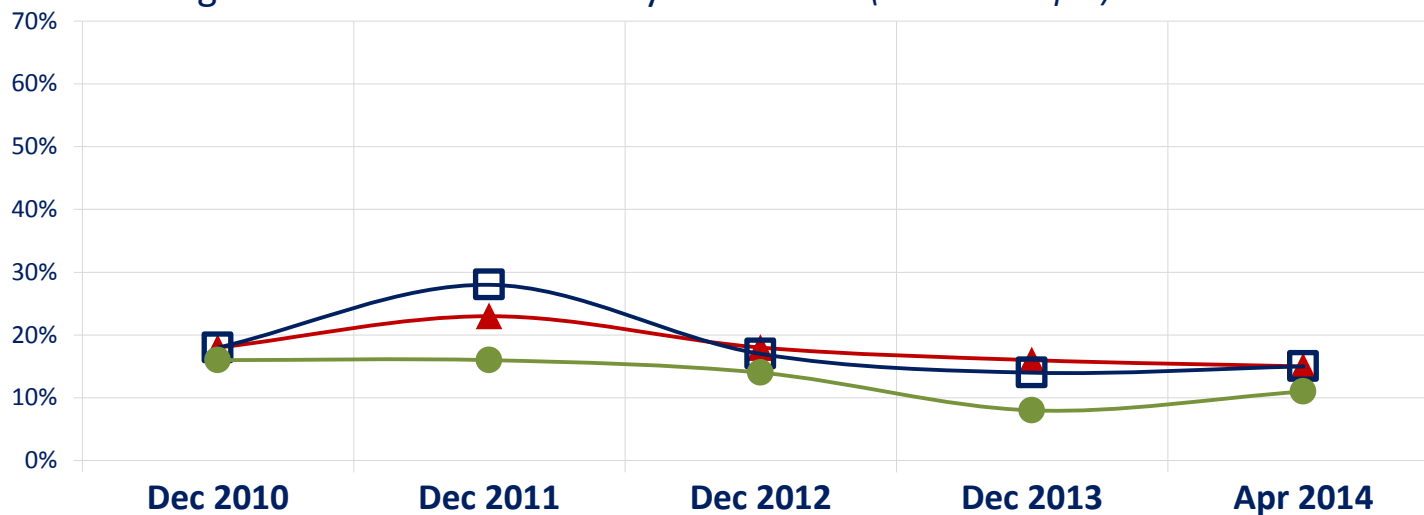
11% — Younger

16% — Middle-aged

14% — Older



Tracking Healthcare as an Issue by **INCOME** (% rate in top 3)

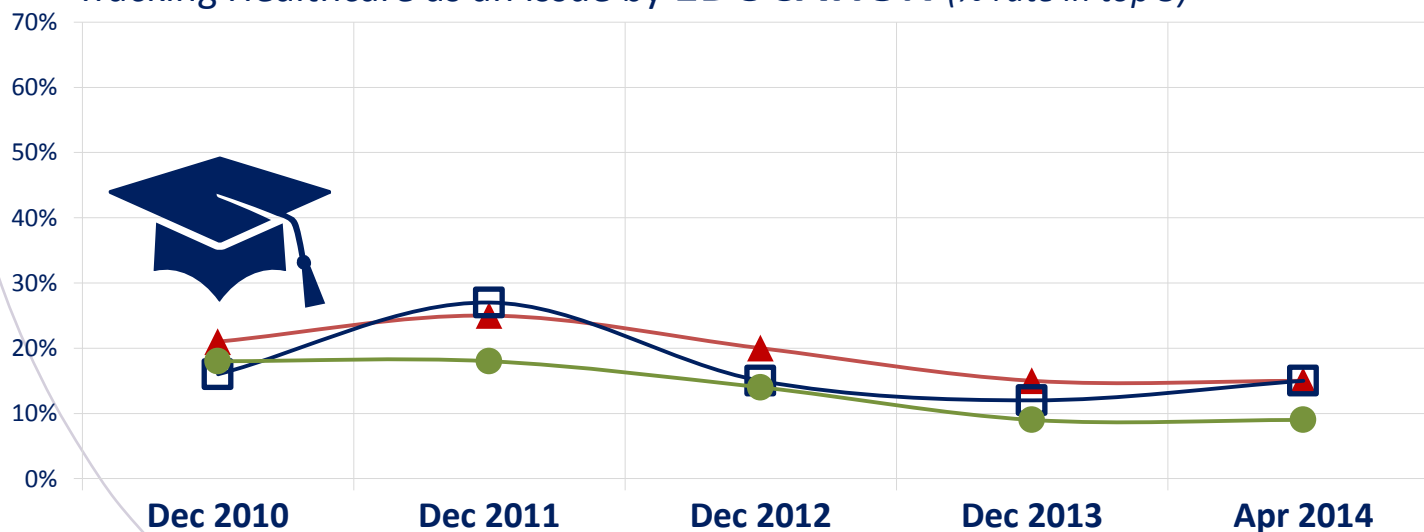


APRIL 2014



15% Lower \$
15% Middle \$
11% Higher \$

Tracking Healthcare as an Issue by **EDUCATION** (% rate in top 3)

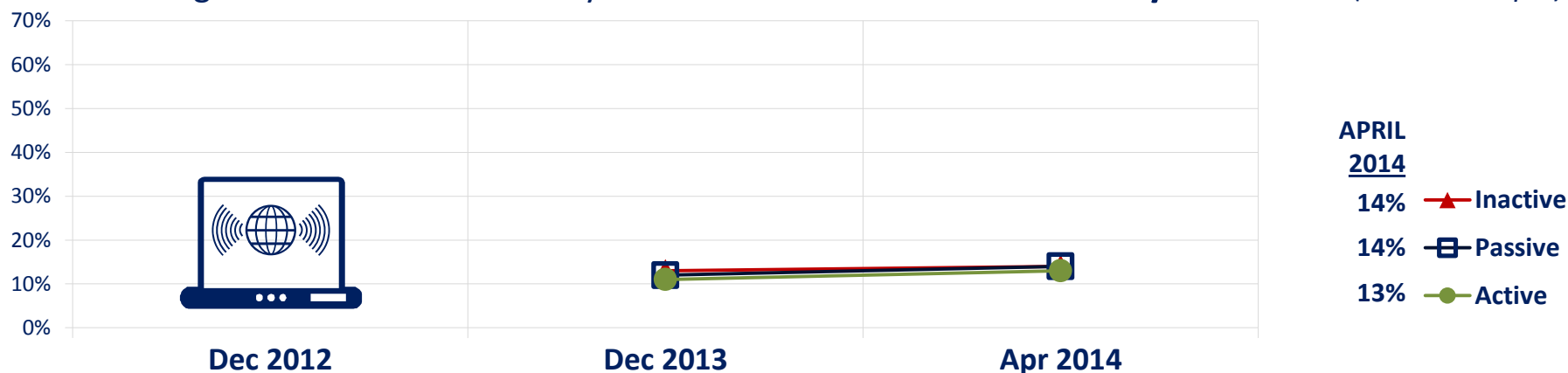


APRIL 2014

15% Lower Ed.
15% Middle Ed.
9% Higher Ed.



Tracking Healthcare as an Issue by **ONLINE ACTIVITY RE SOCIAL/POLITICS** (*% rate in top 3*)



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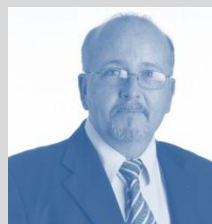
Contacts

and Methodology

OVERSIGHT, STRATEGY



Heather Dawson
Vice-President,
Toronto



Chris Martyn
Chief Research Officer/Managing Director
Toronto



Sarah English
Associate Vice-
President, Ottawa



Michael Howell
Associate Vice-
President, Toronto



Lauren Korosec
Research Manager,
Toronto



Mike College
President, Canada
Ottawa



Sandra Guiry
Senior VP
Advanced
Analytics/Design
Toronto



Jan Hodes
Senior VP,
Jacksonville, FLA,
USA 

ADVISORY





Brad Griffin
Vice President /
Manager
Qual/Quali-Quant/
Journey
Toronto



Kyle Braid
VP/Managing
Director
Vancouver



Bobby Duffy
Director,
Social Research Institute,
Ipsos Mori 
London, UK

SURVEY METHOD	COUNTRIES	SAMPLE	WEIGHTING
<p>The survey instrument is conducted monthly in 24 countries around the world via the Ipsos Online Panel system. Data are normally collected in the 2nd and 3rd weeks of each month.</p> 	<p>The countries normally included in the tracking include Argentina, Australia, Belgium, Brazil, Canada, China, France, Germany, United Kingdom, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.</p>	<p>The normal sample each wave consists of an international sample of approximately 19,000 adults age 18-64 in the US and Canada, and age 16-64 in all other countries. Approximately 1000+ individuals participate on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Indonesia, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.</p> 	<p>Weighting is employed to balance demographics to 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 and a 100% response rate 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 19 times out of 20 per country for a sample of 500 of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.</p>