

Citizens' views of health services

around the world

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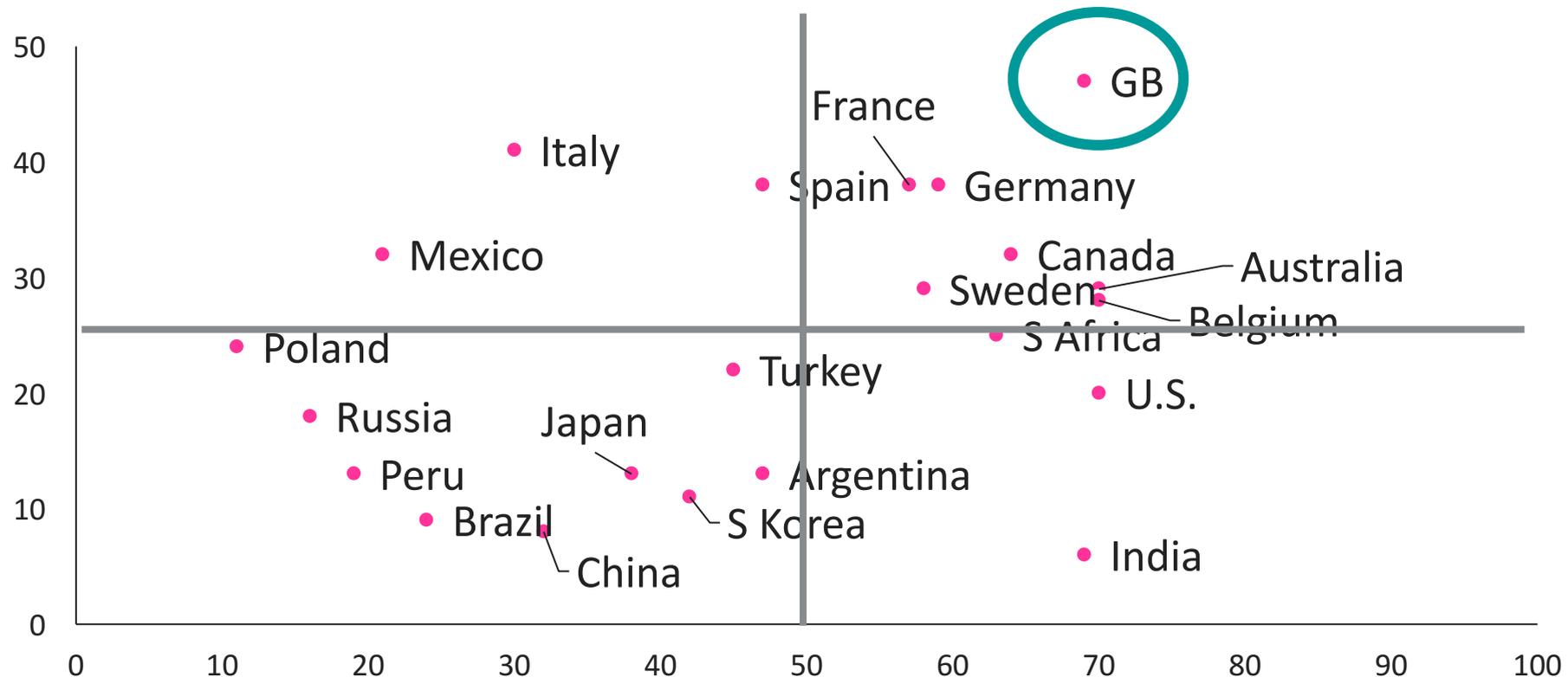


Ipsos MORI
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Countries which rate their healthcare systems highly

are also most worried about them

% expect the **quality of healthcare** that they and their family will have access to locally to **get worse** over the coming years



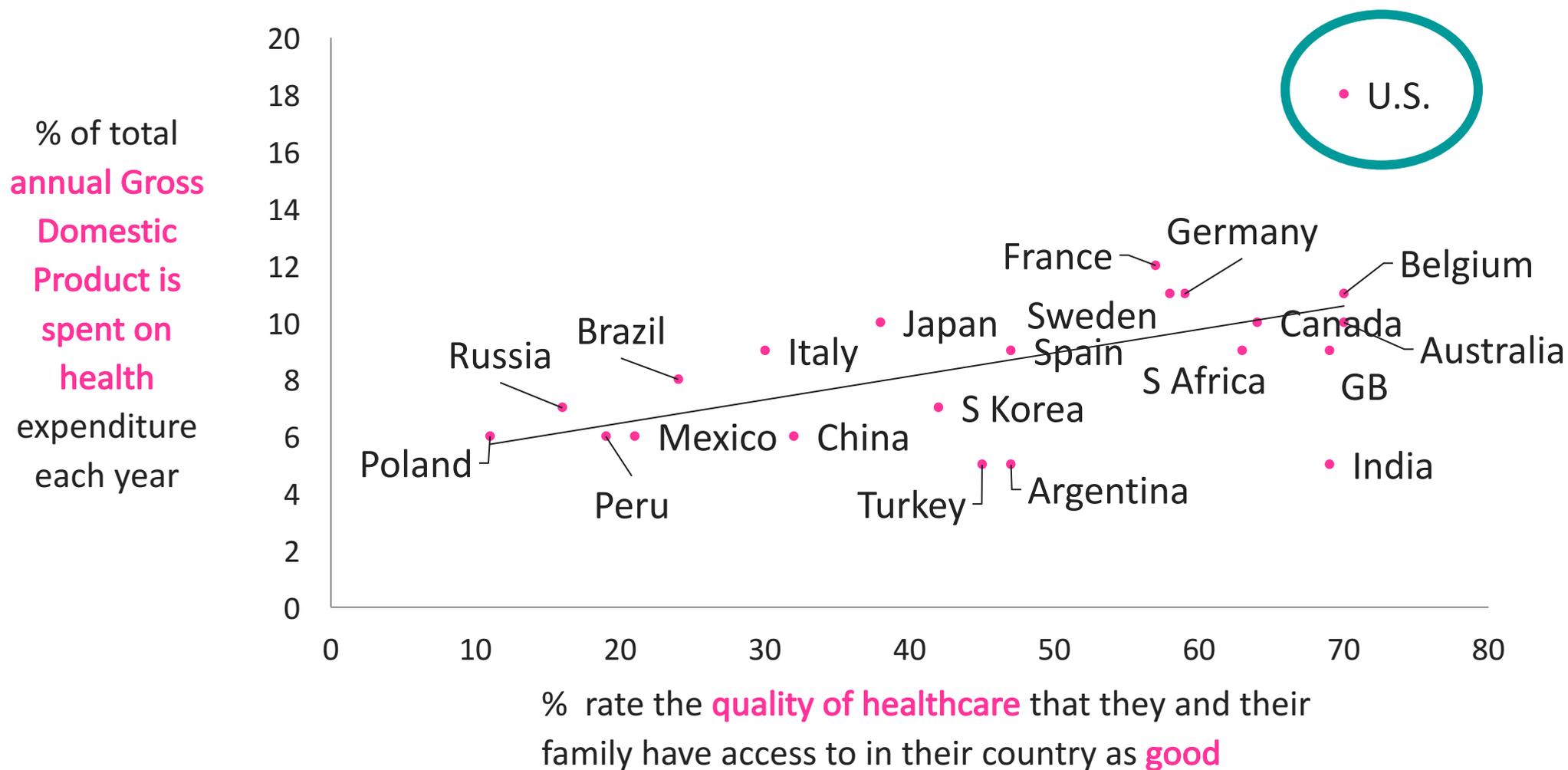
% rate the **quality of healthcare** that they and their family have access to in their country as **good**

Base: 18,180 adults 16-64 across 23 countries, online, 12 September – 11 October 2016

Source: Ipsos MORI Global Trends Survey

There is some correlation between spend on health

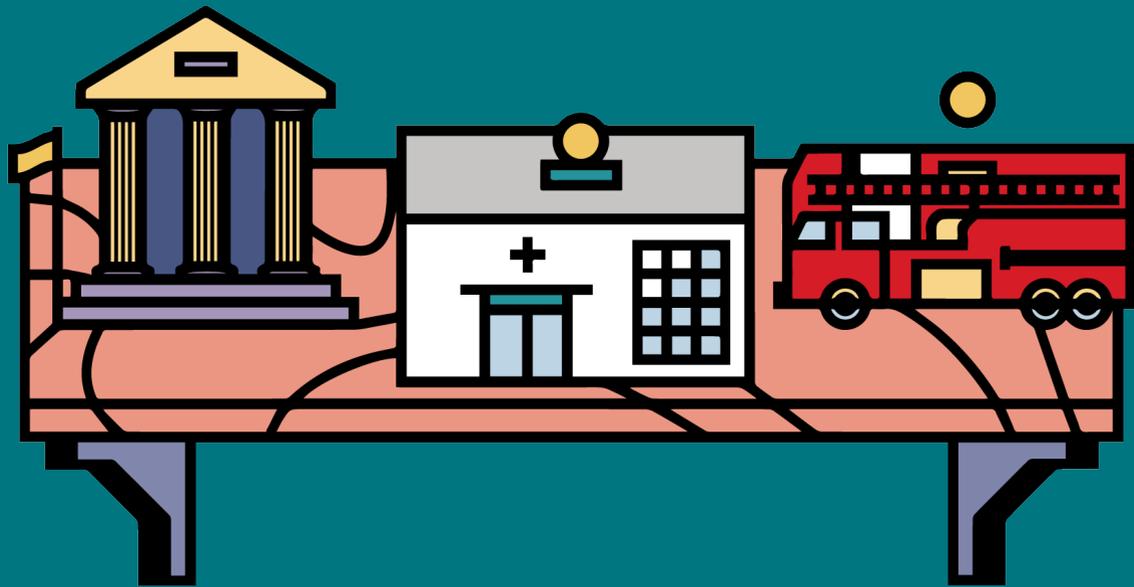
and views of services



But **little link** between how **worried** people are and **health indicators**

Base: 18,180 adults 16-64 across 23 countries, online, 12 September – 11 October 2016

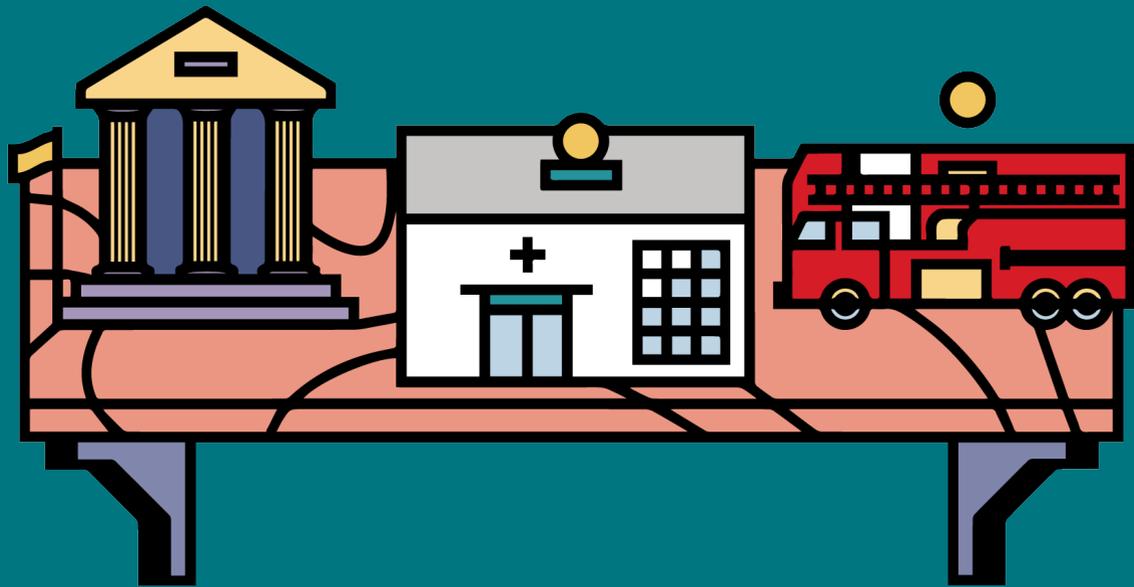
Source: Ipsos MORI Global Trends Survey



BUT WE KNOW PEOPLE DON'T
HAVE A GOOD SENSE OF
EXPENDITURE ON HEALTH

GAME CHANGERS





WHAT PERCENTAGE OF TOTAL

ANNUAL GROSS DOMESTIC

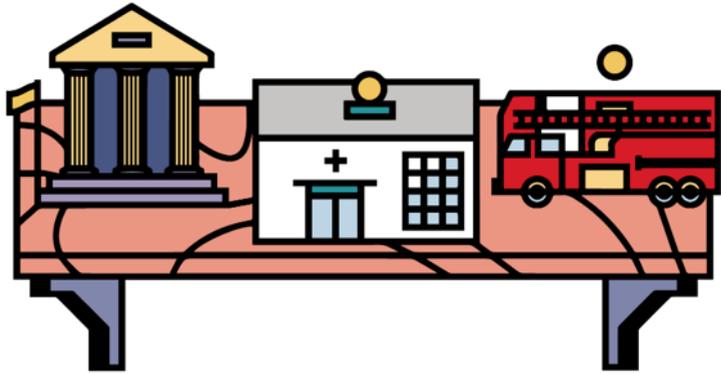
PRODUCT DO YOU THINK IS

SPENT ON HEALTH

EXPENDITURE EACH YEAR?

GAME CHANGERS

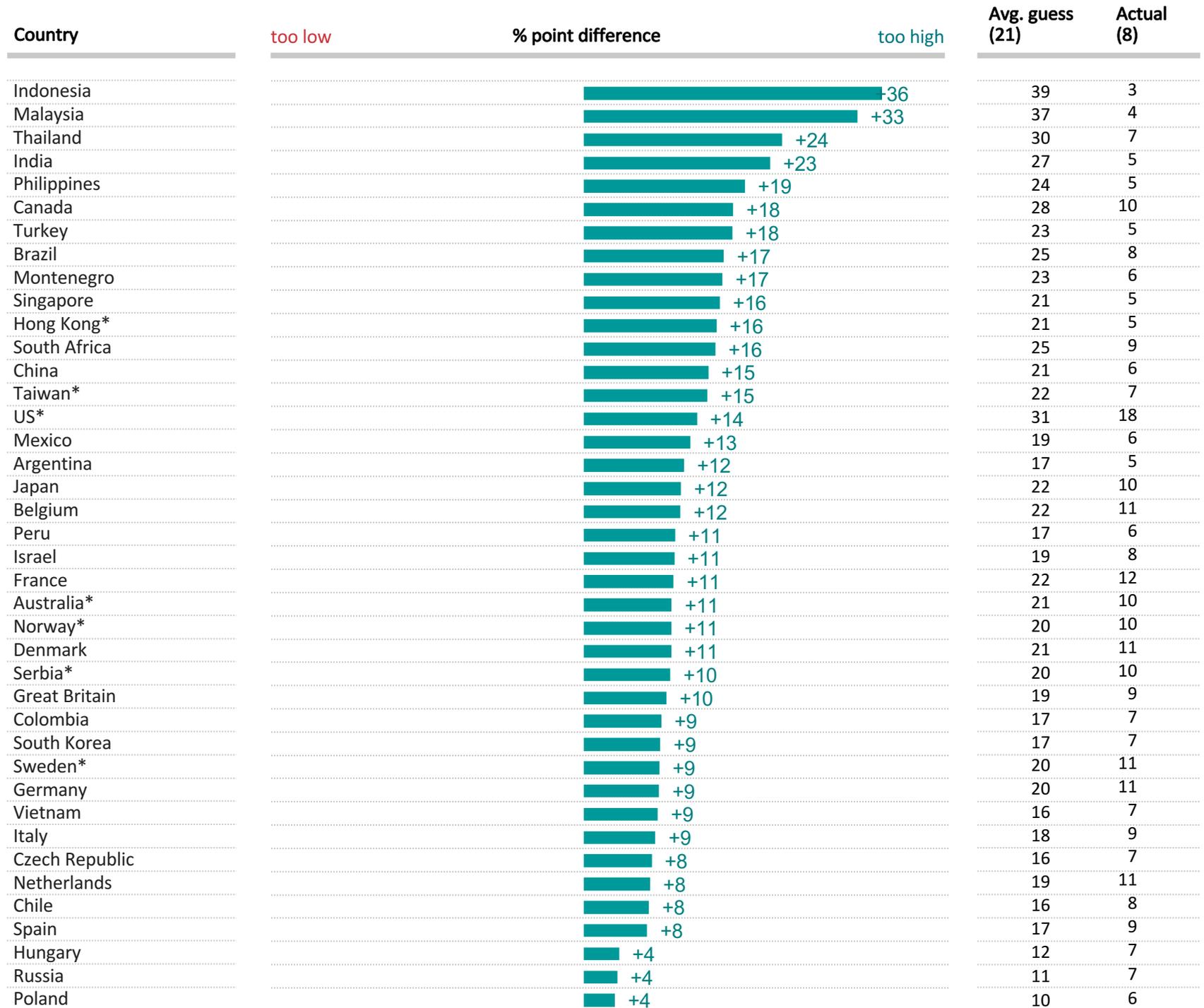




What percentage of total annual Gross Domestic Product do you think is spent on health expenditure each year?

We think we spend much more on our health than we actually do.

Base: 27,250 adults 16-64 across 40 countries, online, 22 September – 6 November 2016



The 'actual' data for this question is largely from the World Bank. Instances where the 'actual' data comes from another source are indicated with an asterisk (*). Please see <http://perils.ipsos.com/> for full details of all sources.

Looking at the UK

healthcare system

in a bit more

detail...



We are generally very happy with its

current state

68%

are satisfied with the NHS

78%

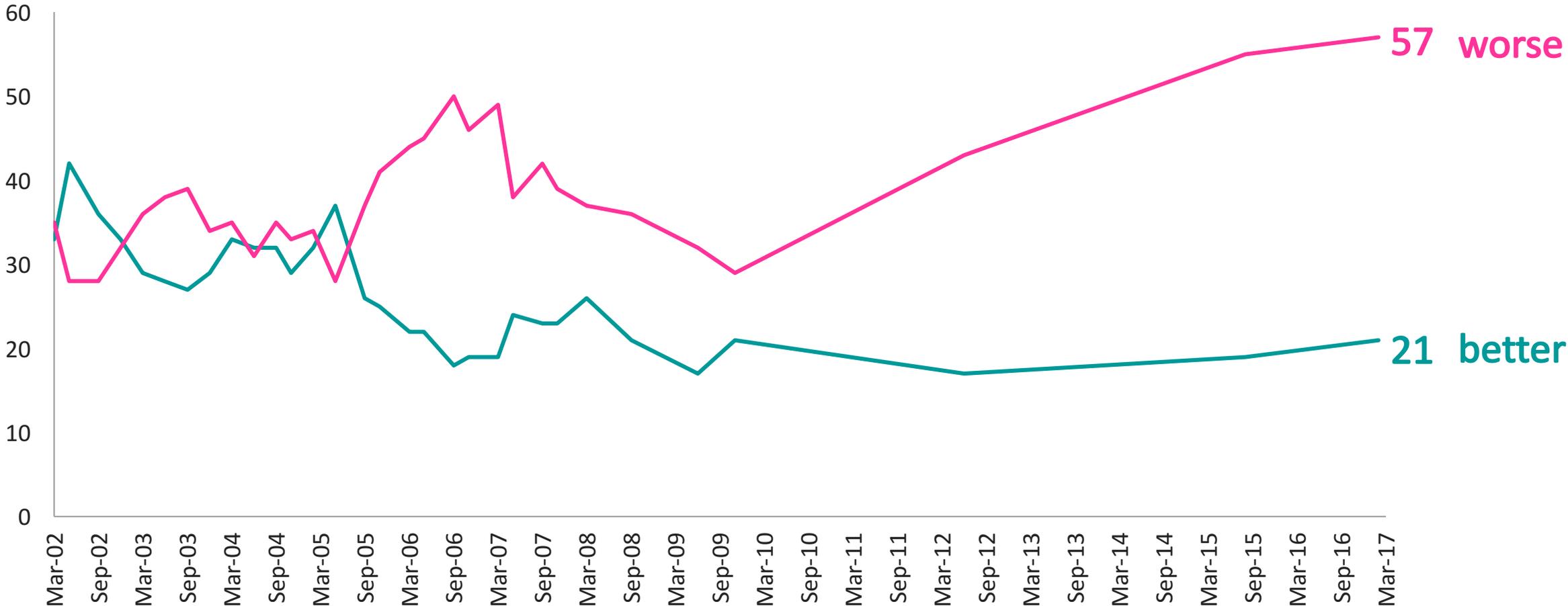
say Britain's NHS is one of the best in the world



But record numbers expect the NHS to get worse over

the next few years

And thinking about the NHS over the next few years do you expect it to get...?



Base: March 2002 – August 2016, Adults in Britain (c. 1000 per wave)

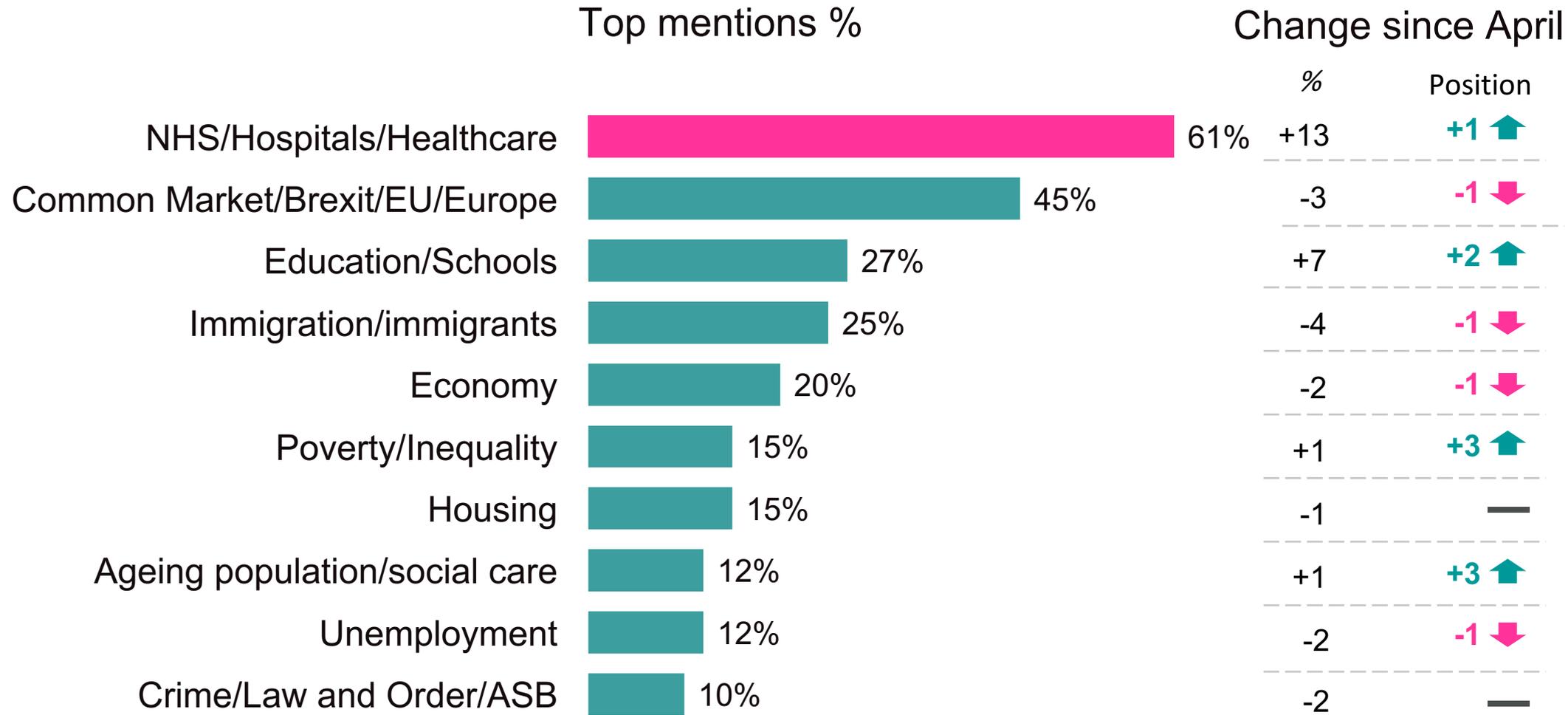
Source: Ipsos MORI Government Delivery Index

Base: February 2017, 1044 adults aged 18+ in the UK, 10-14 February 2017

Source: Ipsos MORI Political Monitor February 2017

We are more worried about it than any other issue

What do you see as the most/other important issues facing Britain today?



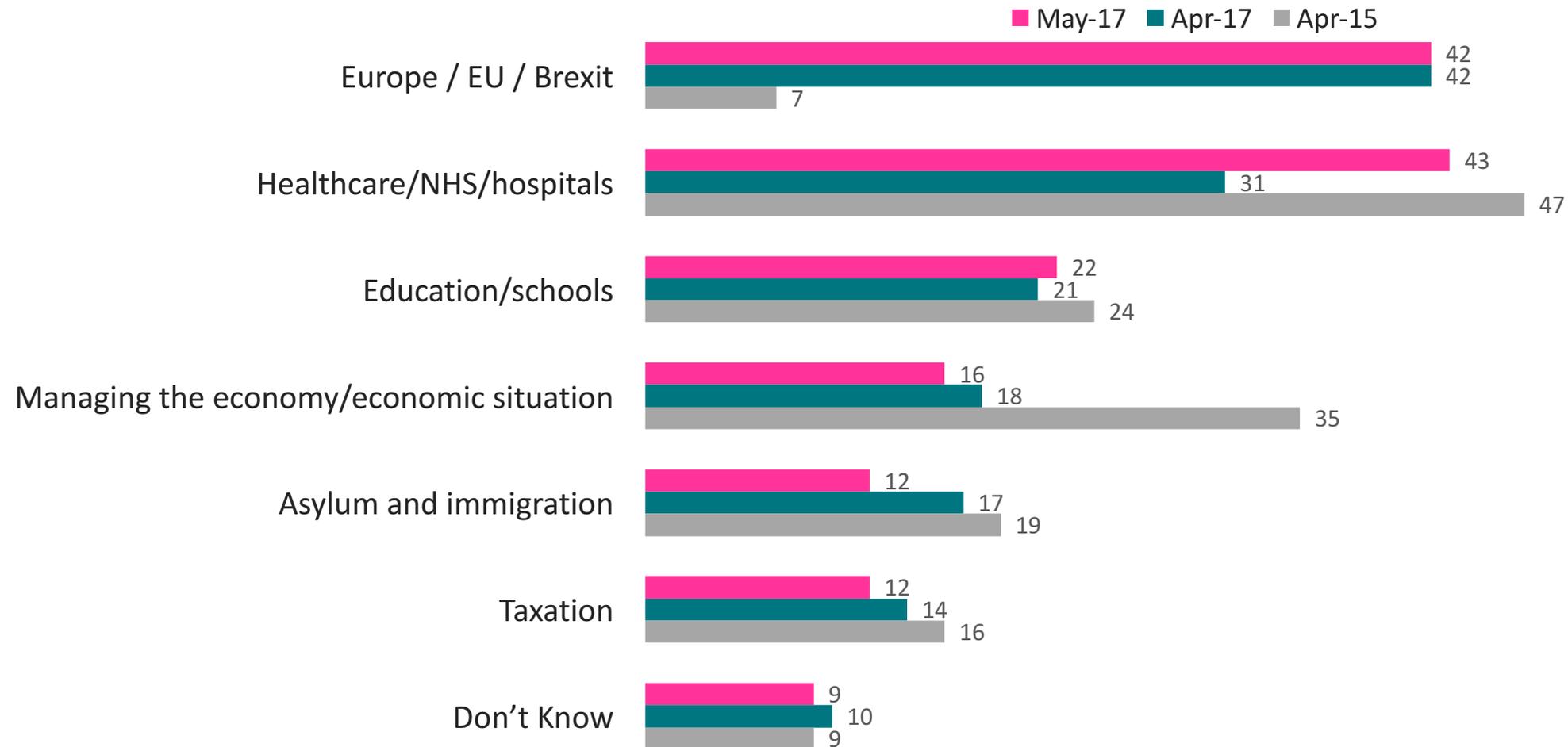
Base: 997 British adults 18+, 5 – 15 May 2017

Source: Ipsos MORI Issues Index

...and we said the NHS would be important in deciding how to vote

to vote last Thursday

Looking ahead to the General Election, which, if any, issues do you think will be very important to you in helping you decide which party to vote for?* (UNPROMPTED)

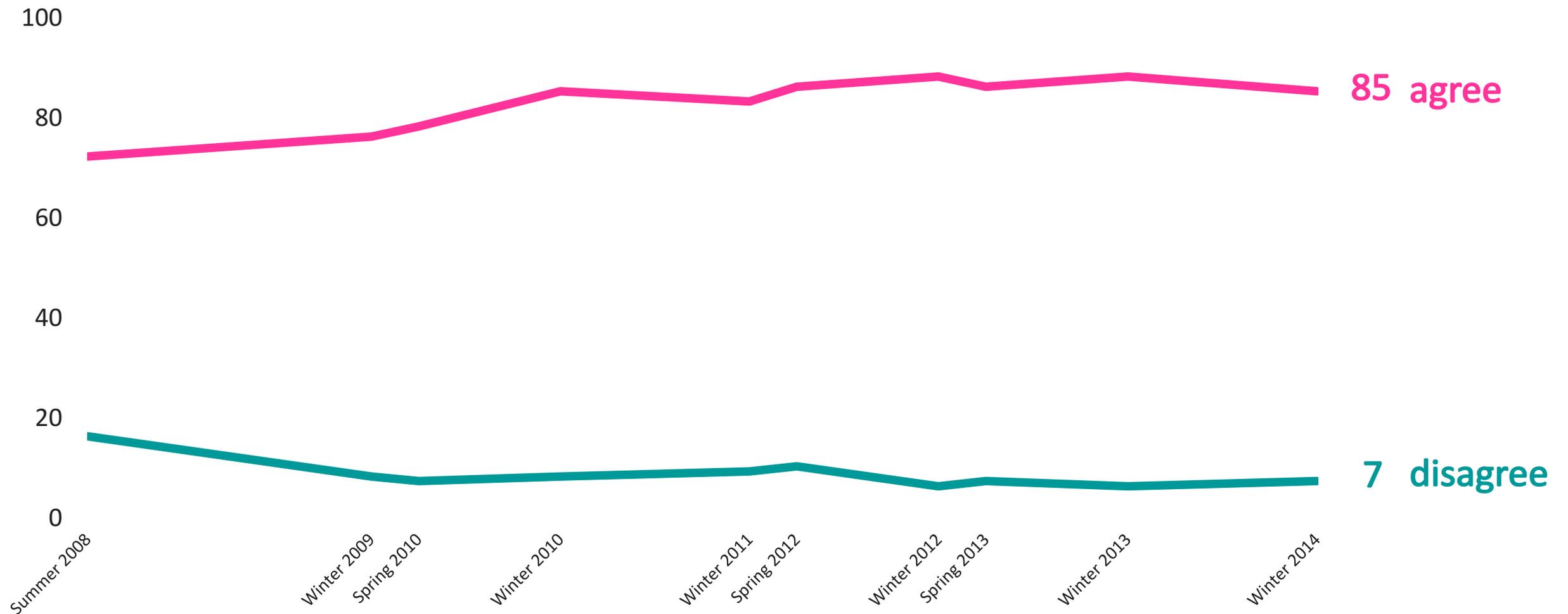


Base: 1,053 British adults 18+, 21st – 25th April 2017

Source: Ipsos MORI Political Monitor

Our concerns are largely about funding

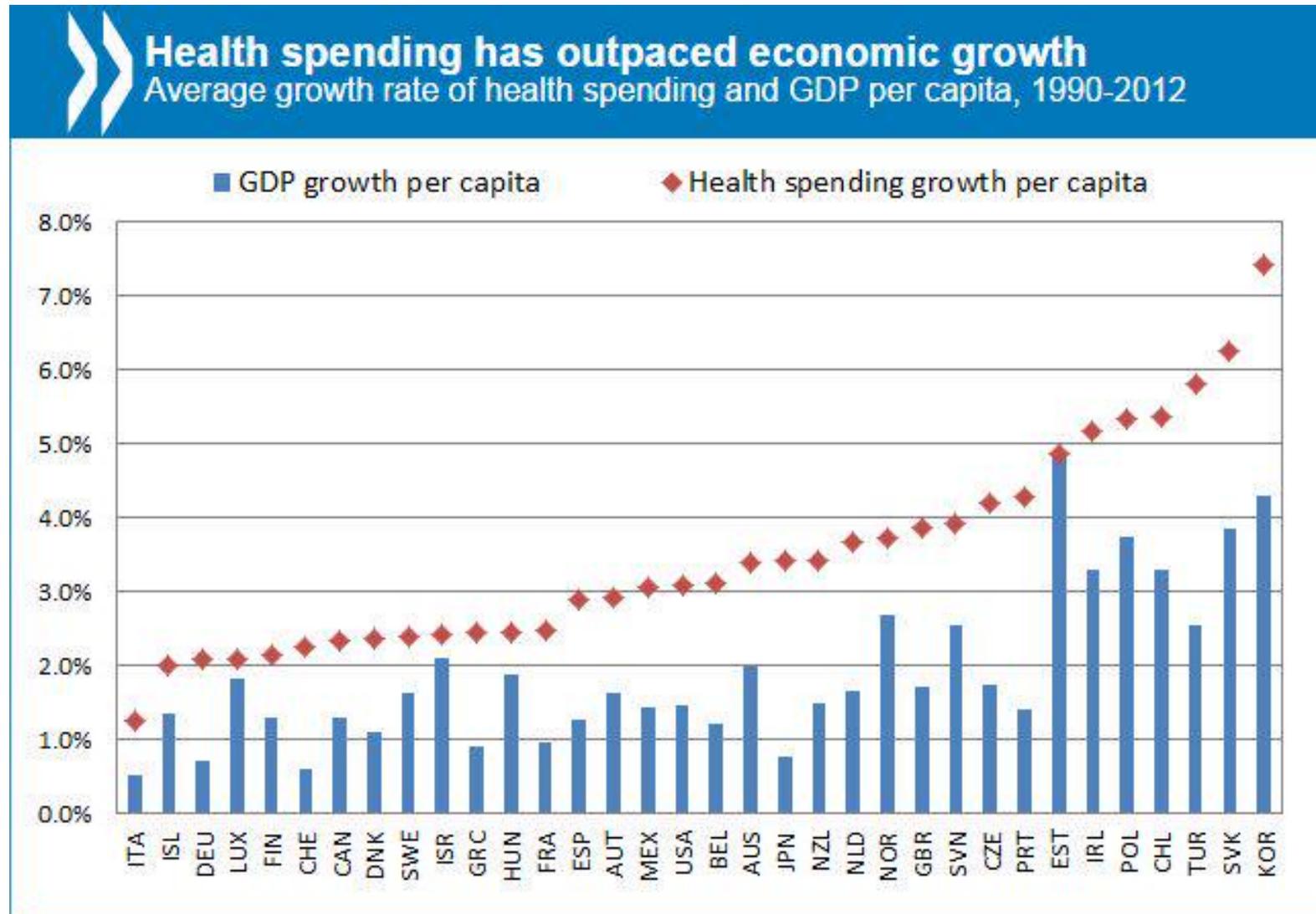
Please tell me whether on the whole you agree or disagree with each of the following statements... **The NHS will face a severe funding problem in the future**



Base: c1000 adults in England per wave

Source: Ipsos MORI/Department of Health Public Perceptions of the NHS Tracker Survey

There is, of course, course for concern



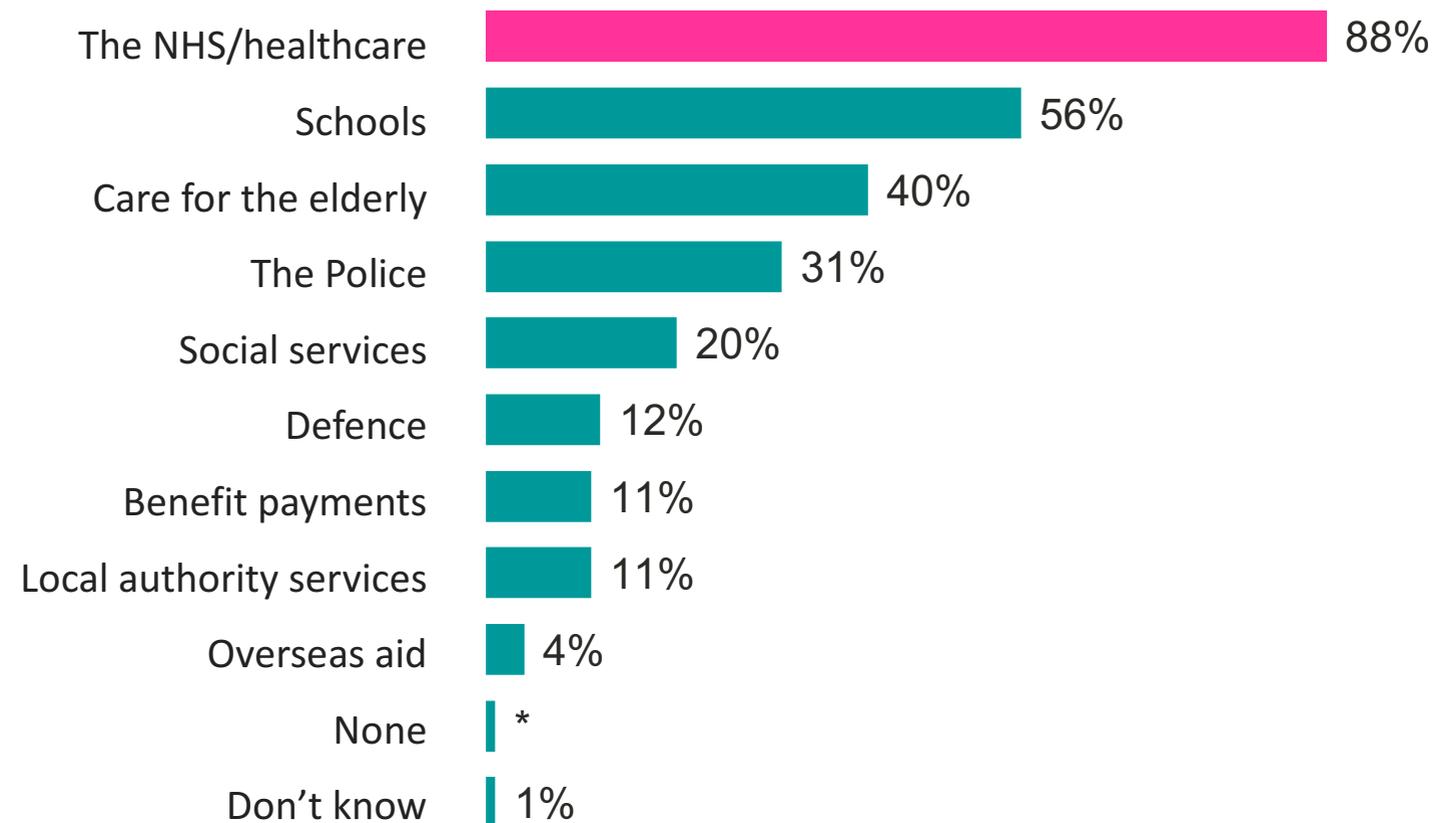
*Just 30 years ago, you could almost fit **every Australian aged over 100** into the same **bus**. By mid-century, we will have around **40,000 centurions** – enough to fill a **football stadium**.*

Source: OECD <http://www.oecd.org/health/healthcarecostsunsustainableinadvancedeconomieswithoutreform.htm>

People are more protective over NHS spending than any

other form of spending

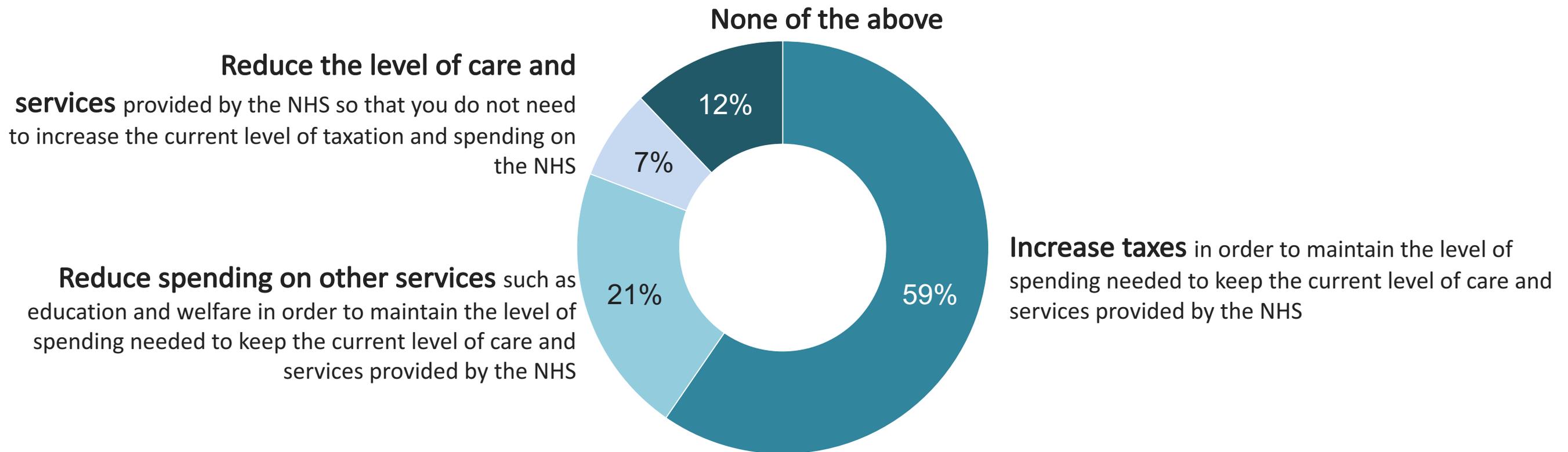
Which TWO or THREE, if any, of the following main areas of public spending do you think should be protected from any cuts?



There is appetite to pay more in tax in order to help

the NHS

Many experts argue that it is becoming more expensive to fund the NHS because of increasing costs of treatments, an ageing population and several other factors. This means that even in order to maintain the current level of care and services provided for free by the NHS, spending on the NHS would have to increase. **With that in mind, which, if any, of the following would you most like to see?**

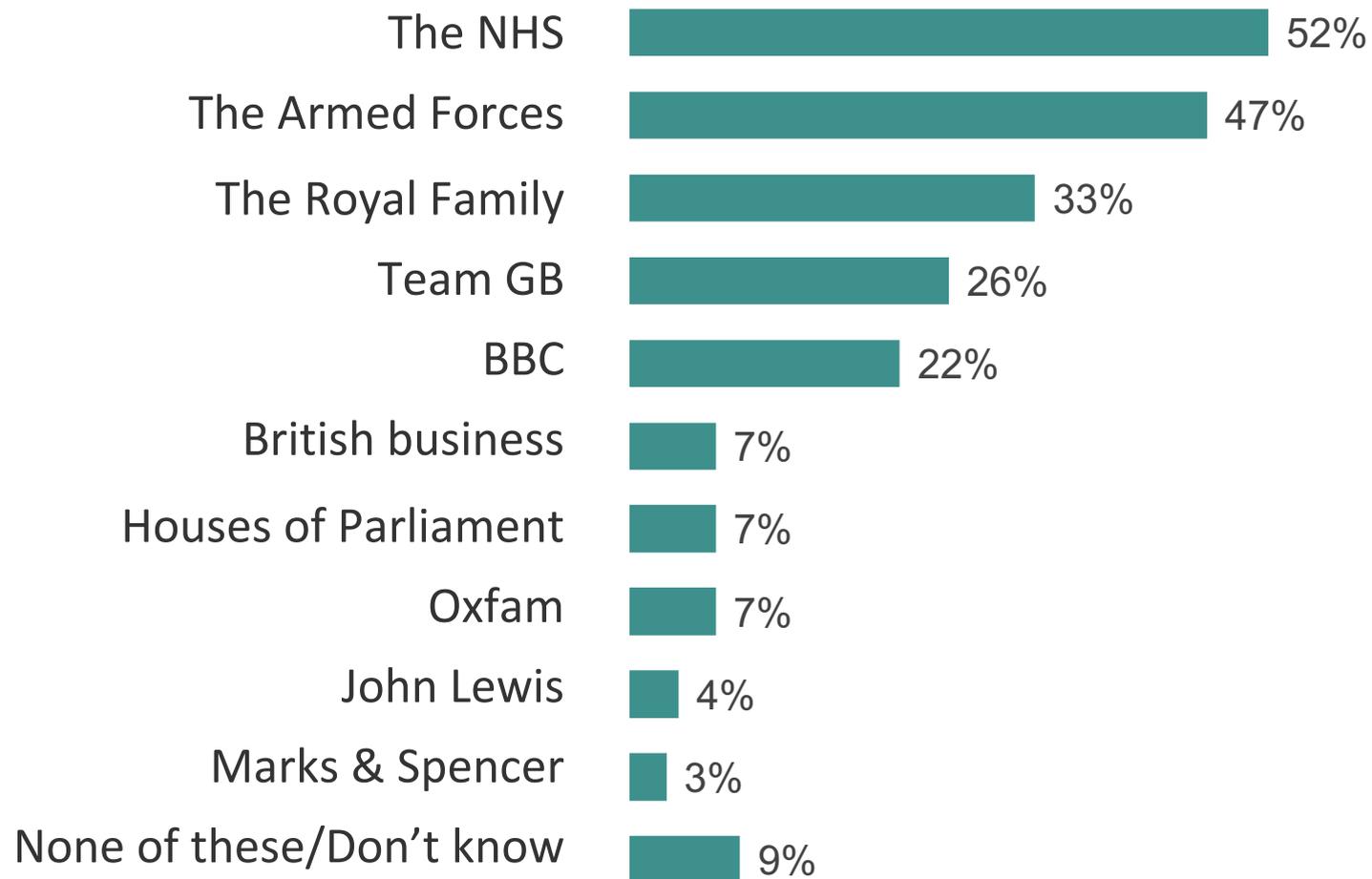


Base: 1792 adults aged 15+ in Great Britain, 13 – 23 March 2015 (excluding those who said 'don't know')

Source: Ipsos MORI poll for The Health Foundation

It is, after all, the “closest thing English people have to a religion”

Which two or three of the following, if any, would you say makes you most proud to be British?



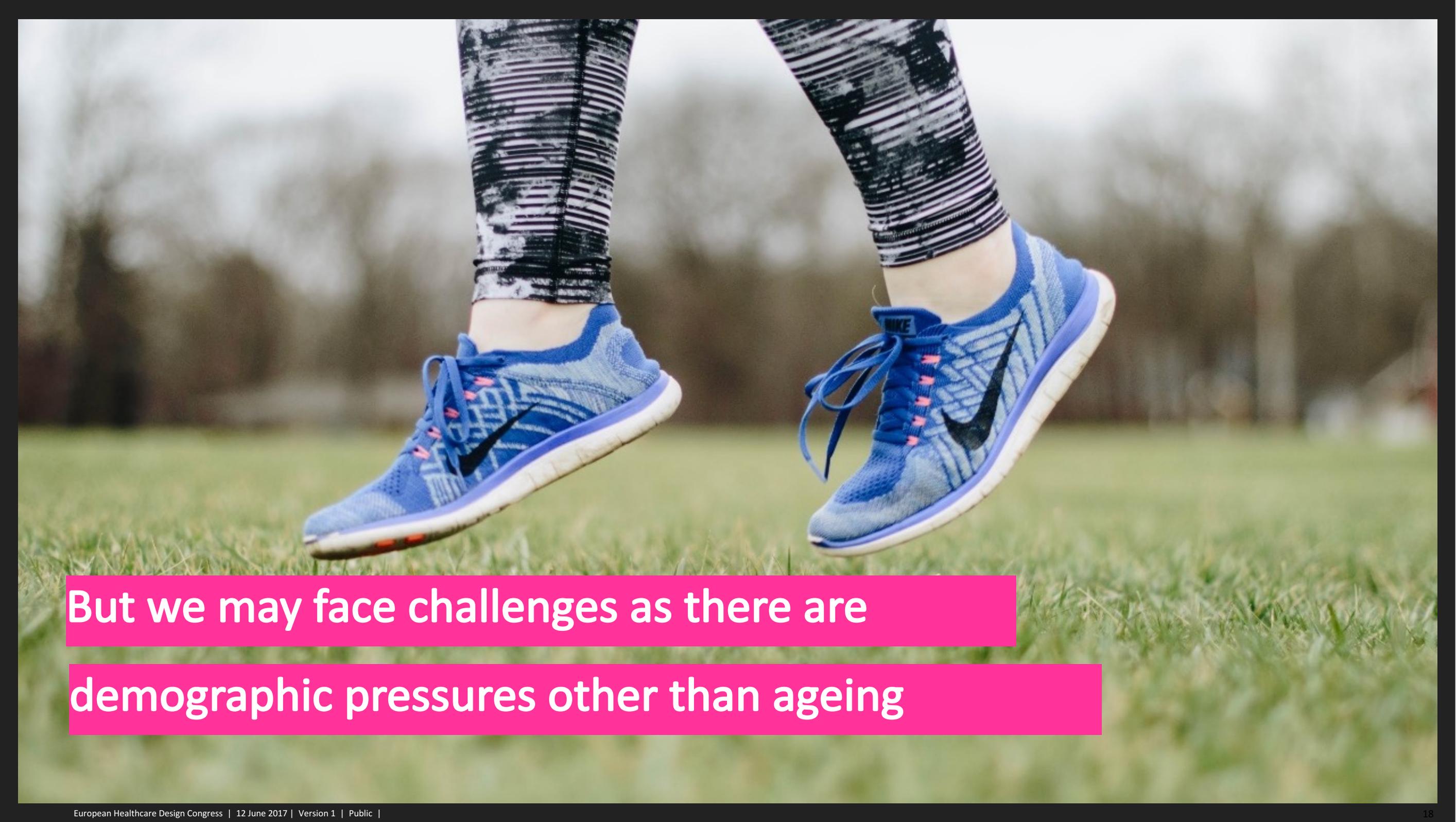
Base: 978 adults in England, March 2014

Source: Ipsos MORI

There is some support for the prevention agenda

“In the UK, we believe that further and greater investment in the NHS will improve the health of the people and the truth is that it won’t, certainly not on its own.”

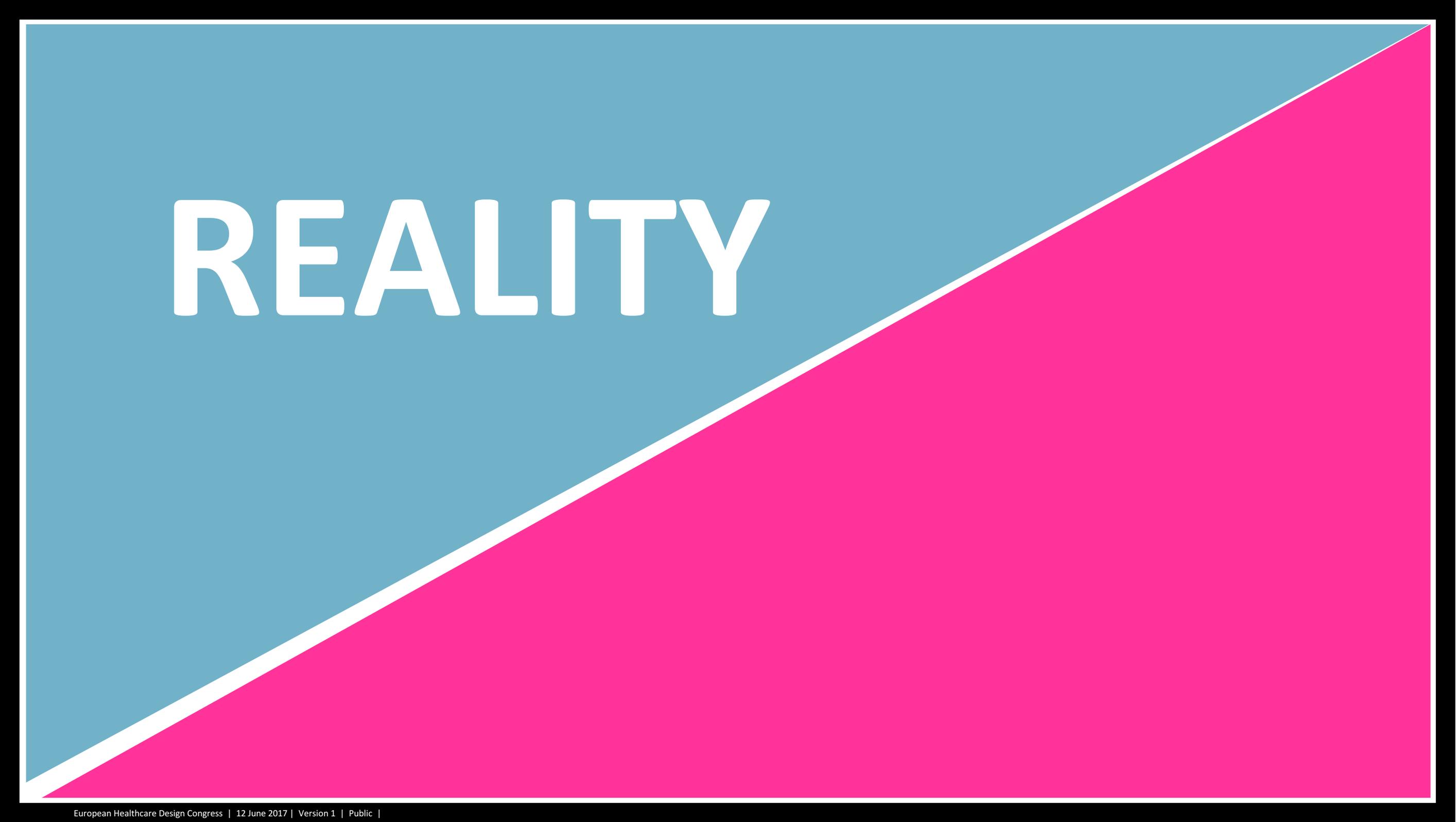
Duncan Selbie, Chief Executive, Public Health England



**But we may face challenges as there are
demographic pressures other than ageing**

MYTH OR REALITY...?

Millennials are more likely
to be overweight than
Generation X at same age...

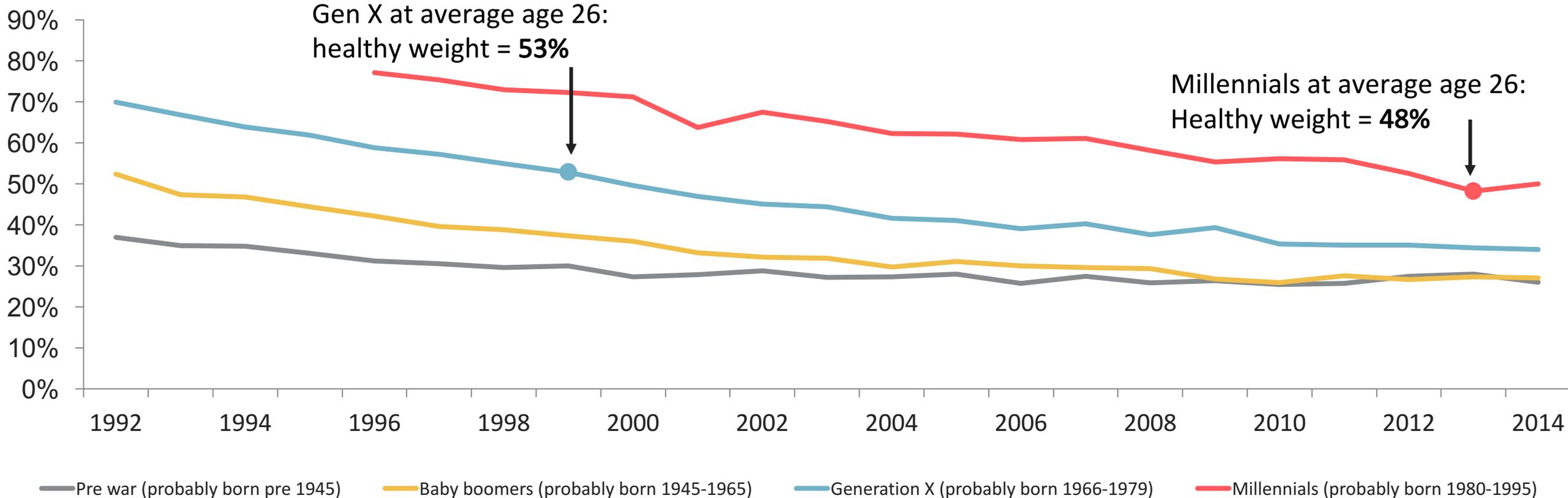


REALITY

Millennials are the first young generation where over

half are overweight

% with a healthy weight, UK



...and they consume more sugar than the rest of us

Daily sugar consumption

Millennials now (2012) age 18 - 32

75g

Generation X now (2012) age 33 - 46

55g

Generation X then (2000) age 21 - 34

65g

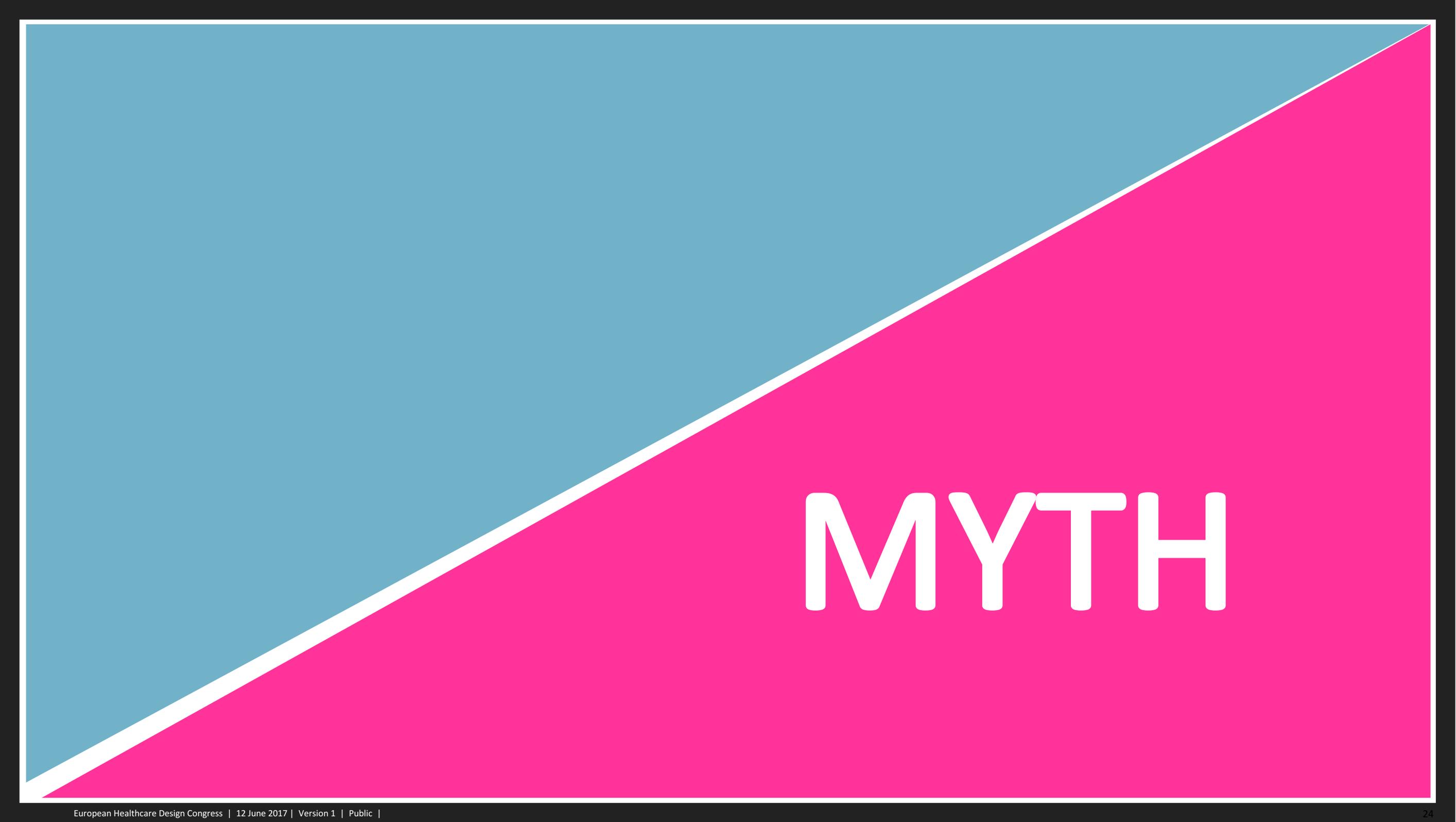
Baby boomers now (2012) age 47 - 67

53g

Source: National Diet and Nutrition Survey

MYTH OR REALITY...?

Millennials are more likely
to smoke than Generation X
at same age...

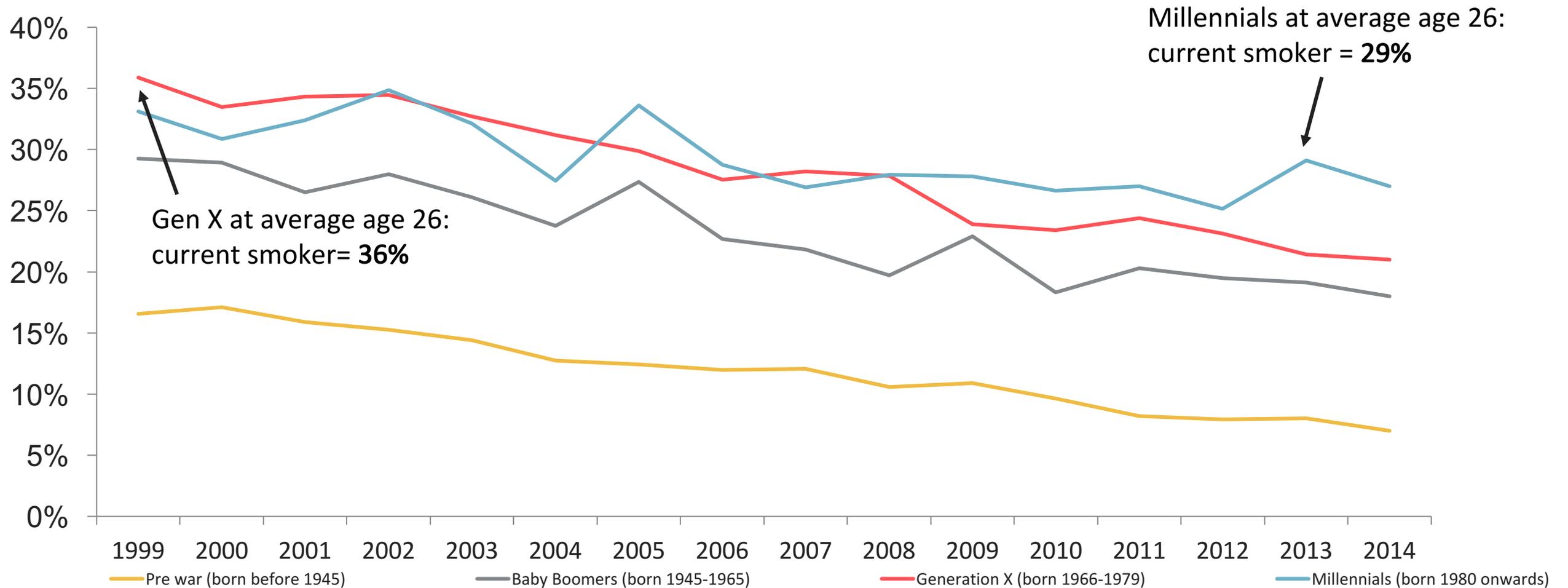


MYTH

Smoking rates have declined in the last 15 years but at

lower rates among Millennials

% current smoker (smoke every day/some days), England



But how surprising is this?

There are lots of myths about

how healthy we are...

MYTH

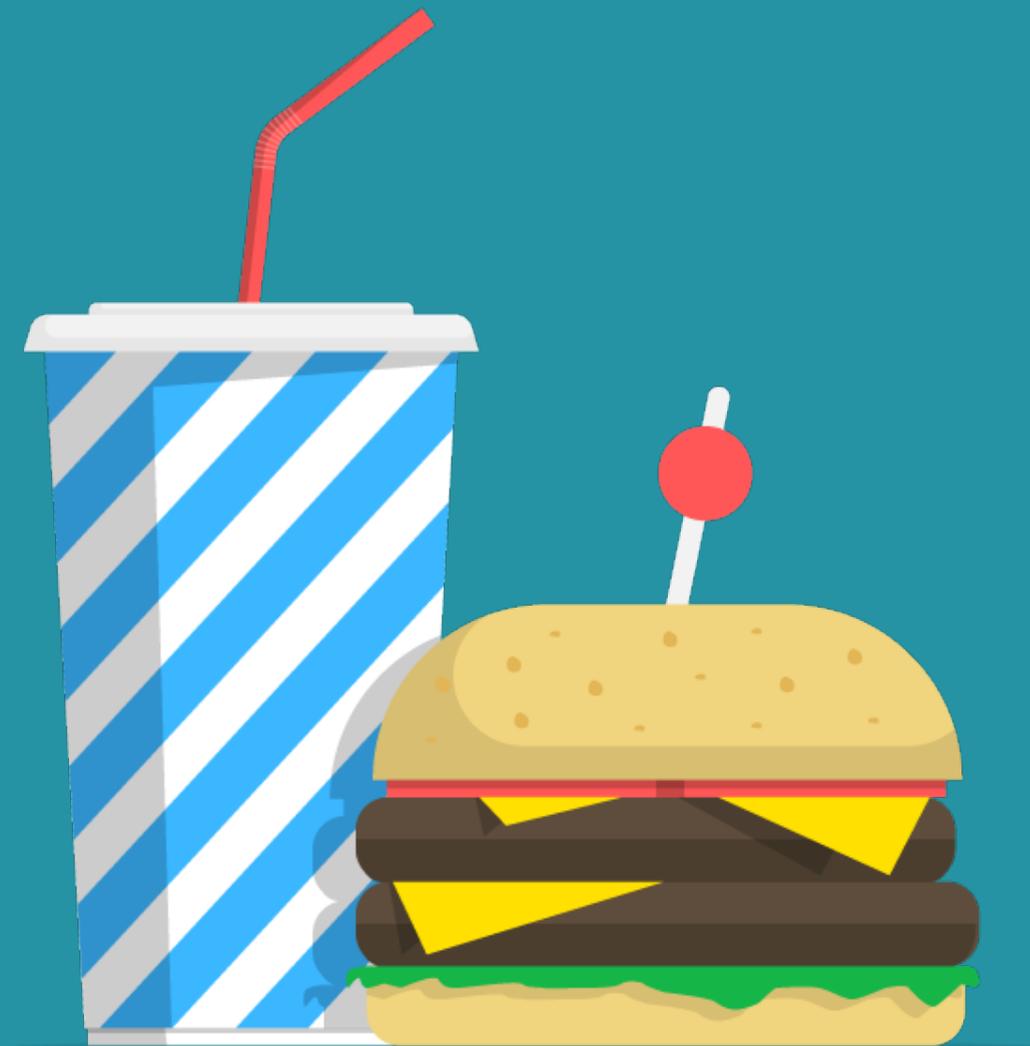
OUT OF EVERY 100 PEOPLE

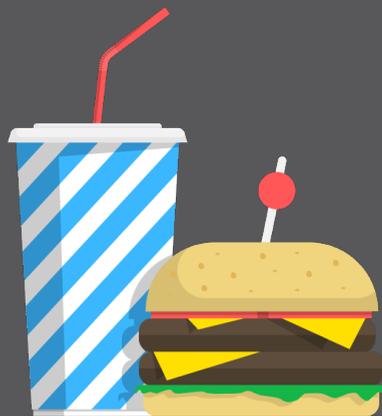
AGED 20 YEARS OR OVER

HOW MANY DO YOU THINK

ARE EITHER OVERWEIGHT

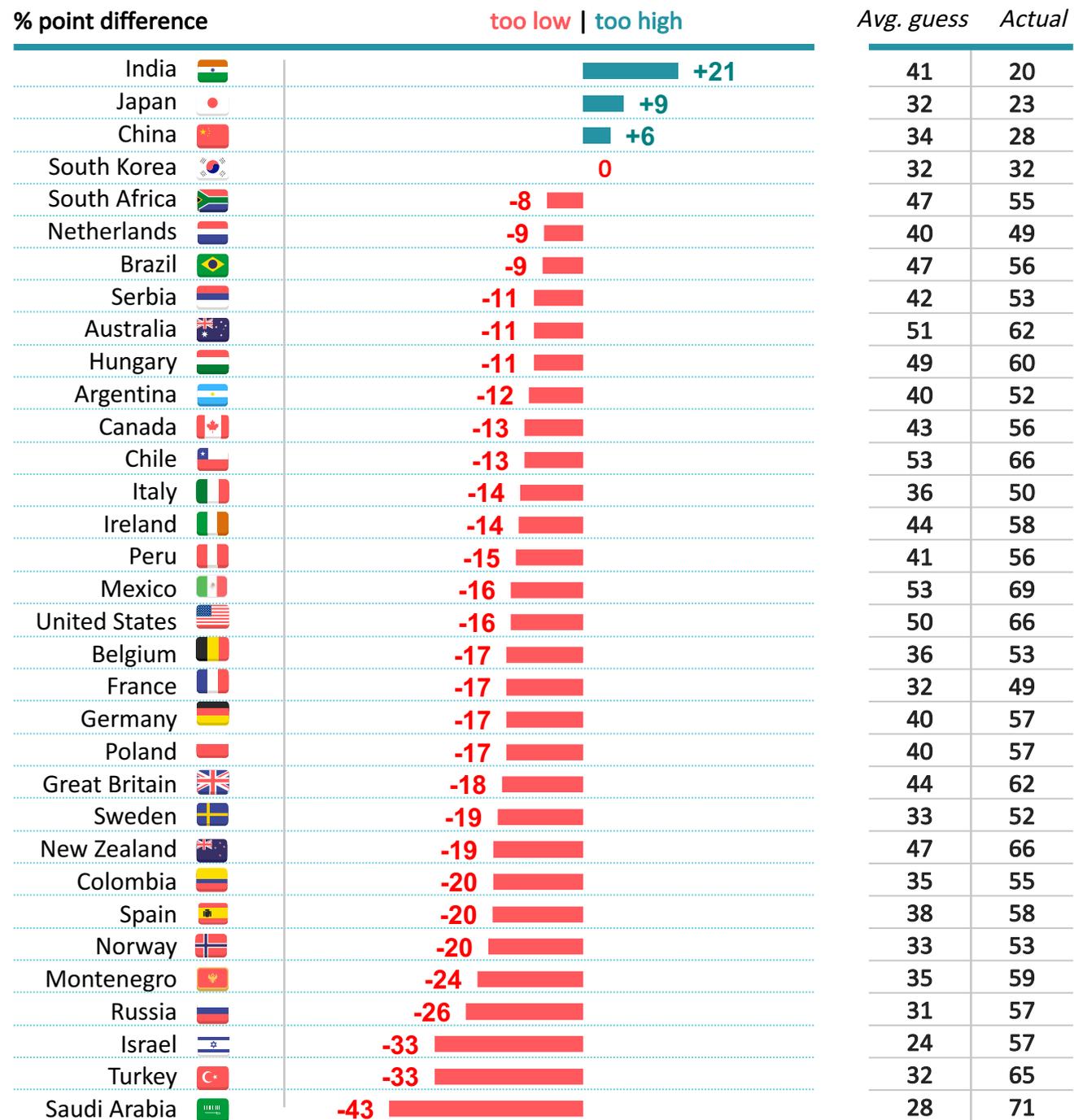
OR OBESE?





Q. Out of every 100 people aged 20 years or over], how many do you think are either overweight or obese?

The public generally underestimate the proportion of overweight or obese people in their country.



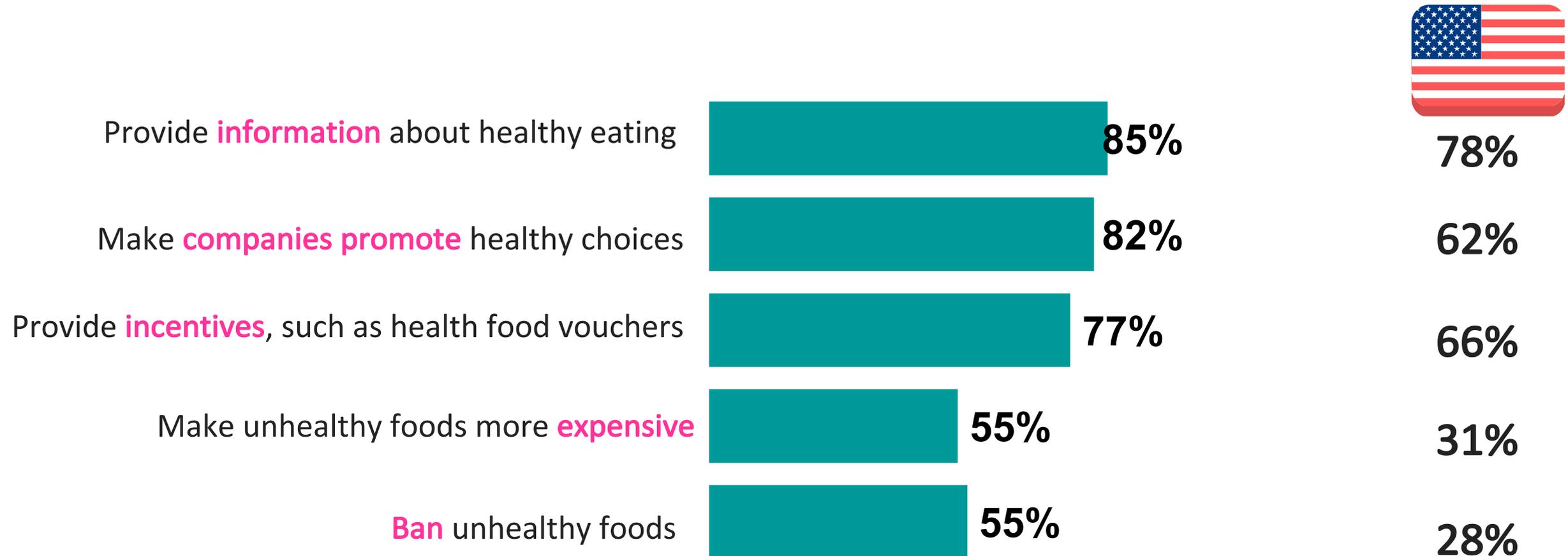
So what sort of public health interventions

are acceptable to people?



Nudges are more popular than shoves

Thinking about what people choose to eat. What, if anything, do you think government should do?



Base: c.500 - 1,000 residents aged 16-64 (18-64 in the US and Canada) in each country, August 2015 and November 2010

Source: Ipsos Global @visor

People are not consistent in their views though though

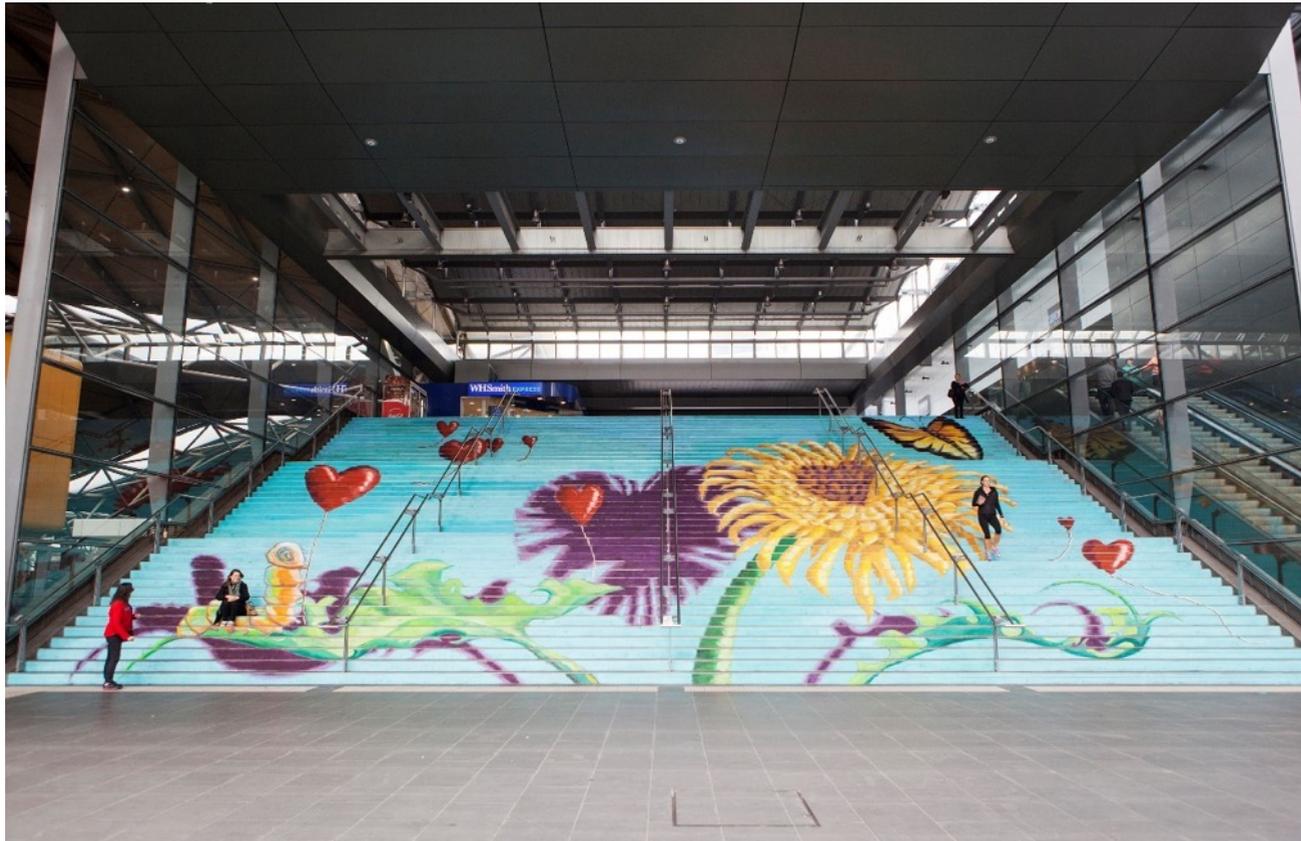
56% agree that
“government should
not get involved in
what people choose
to eat”

35%

68% agree that
“government should
introduce laws to ban
unhealthy foods OR should
introduce laws to make it
more expensive to make
unhealthy
foods”

But there is potential to nudge to a healthier population

Southern Cross Station, Melbourne,
140% increase in use of stairs during peak hours



The Blue Zone Project, Iowa,
Increasing access to pedestrian walkways to
encourage walking in and around towns

Connected health could be a potential game changer



...but people don't use devices for long

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



	Yes, currently use	Formerly used
Overall	12%	12%
USA	21%	10%
Sweden	14%	15%
Great Britain	11%	7%
Russia	6%	7%

Health professionals have significant influence



The power of doctors in promoting connected health

is significant, but many need convincing



85%

agree **if their doctor recommended** they use a connected health device as part of their treatment plan **they would**

58%

of **doctors are concerned** about how **patient data is handled** and secured

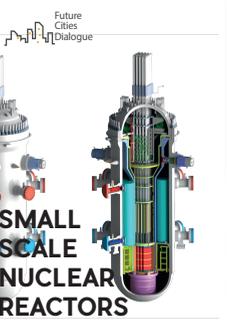
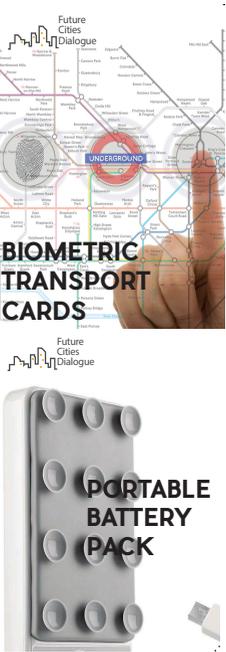
52%

of **doctors are convinced** that connected health devices are helping to **improve health outcomes**

But public acceptance of change is slow - there isn't much much appetite for virtual doctors any time soon

More positive reactions

Less positive reactions



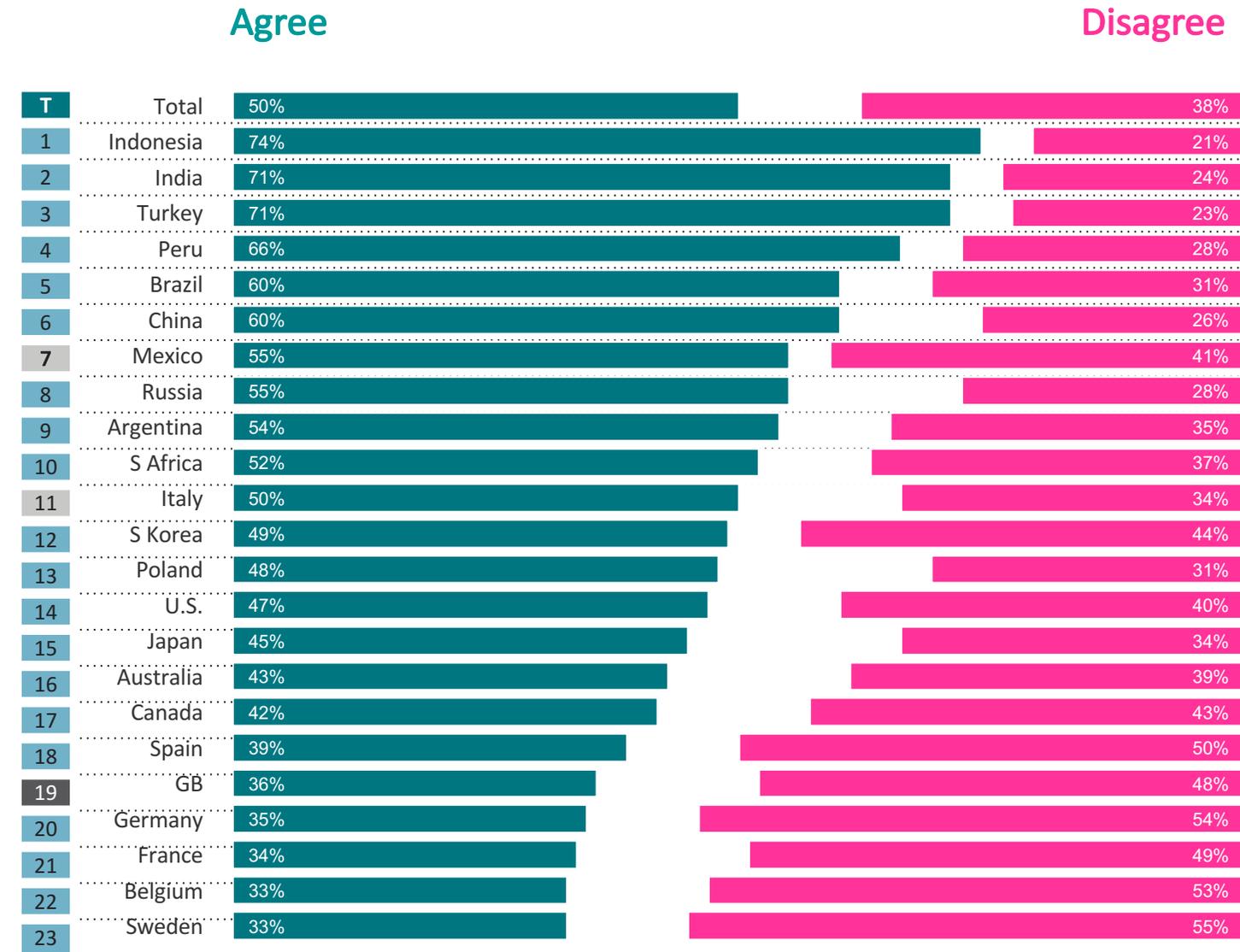
In summary...

- There is wide variation about how we rate healthcare services across the globe
- Some countries are more worried than others
- Those who are happy with their current healthcare systems are most worried, probably because they are keen to preserve them
- But we do face challenges going forwards: the cost of healthcare is increasing and younger generations are not necessarily healthier than before
- It seems nudges will work better than shoves
- Young people are starting to use connected health devices, but there is recognition they can only go some way
- There may be some hope though...

...as half of us think that eventually all medical diseases

will be curable

% Eventually
all medical
conditions
and diseases
will be curable





Thank you

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