



Global Health Survey

EXPERIENCE & PERCEPTION IN 28 COUNTRIES

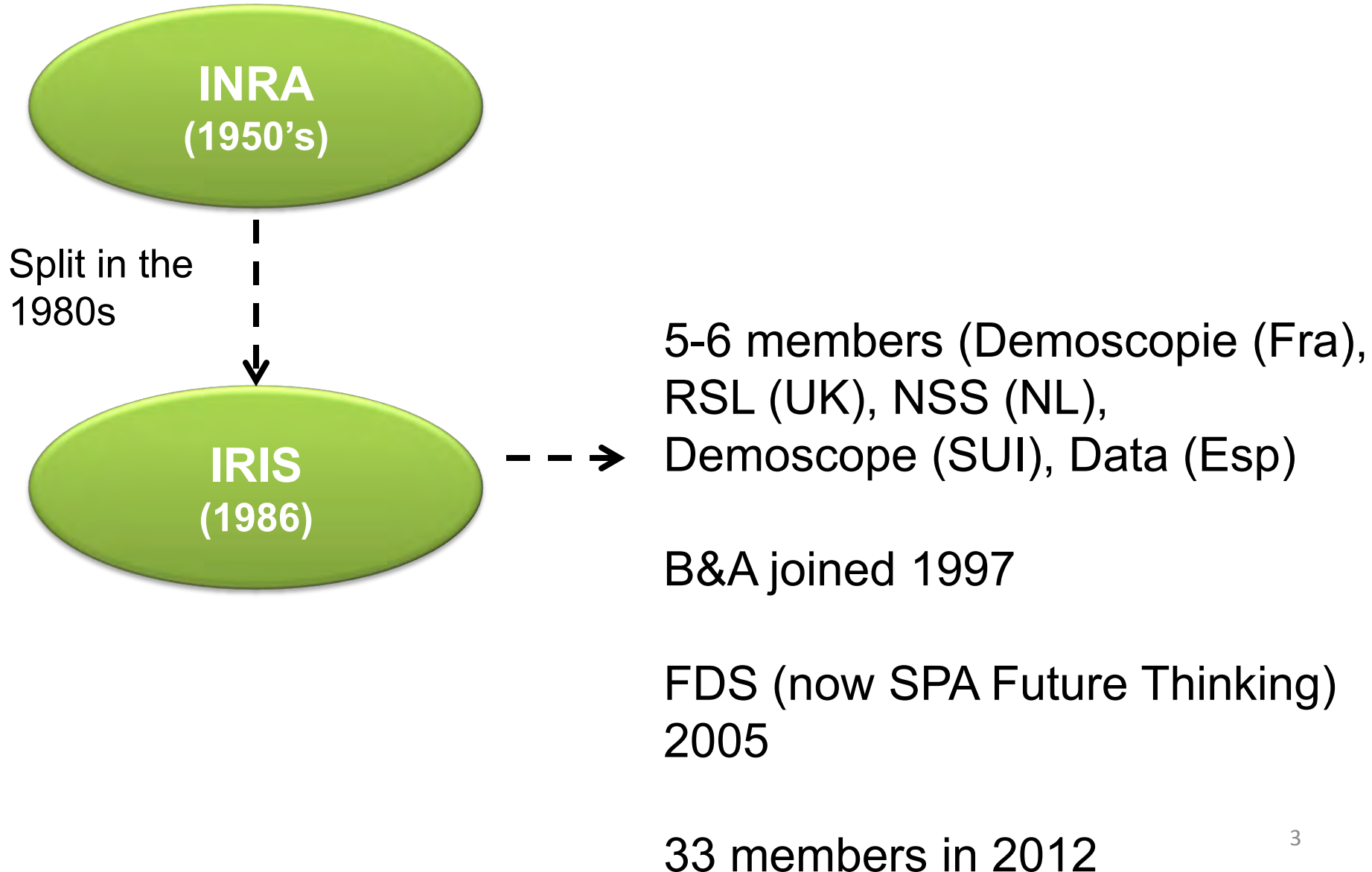
International Research Institutes

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International Research InstituteS



International Research Institutes

- A voluntary trade association (non-ownership)
- Representing and consisting of quality, multi-disciplinary Independent Agencies.
- Thought leadership, sharing experiences, working groups.
- A network with trusted, local expertise overseas.
- Meet personally every six months and virtually much more often.



Our Study

IRIS International Health Survey

- First fielded in 2004....21 countries, slightly smaller-scale.
- Fielded again Autumn 2011:
 - 28 countries
 - 22,000 interviews
 - Mix of methodologies
 - Romania/Canada/Ireland-lead but planned by a group of fifteen.

Sample Sizes X Country

BASE	Method	Total
TOTAL		21988
Finland	Online	500
France	CATI	959
Germany	Online	1087
Greece	CATI & Online	1002
Hungary	CATI	500
Ireland	Face-to-Face	1000
Italy	Telepanel	2030
Lithuania	Face-to-Face	1005
Netherlands	Online	1062
Poland	Online	812
Romania	Face-to-Face	1100
Russia	CATI	520
Slovenia	Online	501
Turkey	CATI	417
UK	Online	1000
Ukraine	Face-to-Face	600

BASE	Method	Total
TOTAL		21988
USA	Online	1014
Canada	Online	1006
Chile	Online	640
Colombia	Online	506
China	Online & Face-to-Face	1000
India	Face-to-Face	1056
Indonesia	Face-to-Face	500
Malaysia	Online & Face-to-Face	427
Thailand	Online	540
Pakistan	Face-to-Face	300
Egypt	CATI	500
Australia	Online	910

Sample Sizes X Region

BASE	Method	All respondents
TOTAL		22364
India	Face-to-Face	1056
China	Online & Face-to-Face	1000
Asia + Africa	CATI, Online & Face-to-Face	2270
Australia	Online	910
East / Central Europe	CATI, Online & Face-to-Face	4956
Western Europe	CATI, Online & Face-to-Face	9007
Americas	Online	3166



Scope

- Perceived Health
- Contributors to Health
- Assessment of Local Systems
- Funding Preference
- Interaction with HCPs
- Opinion of Family Physician
- How we gather information on health
- Personal input desired on health treatment
- Pervasiveness of suicide and related mental conditions



System Failings

System Attitudes

- Broad view persists of crisis in healthcare systems.
- The general view is that **management failings** are the primary detractor moreso than **underfunding**.
- The European perspective is predominantly negative, even in „good“ systems: government or national handing invariably criticised.
- Healthcare as a sector clearly needs “better press”.

National Health System: Good Shape or Crisis

■ Excellent ■ Very good shape

All Countries 3 33

Turkey 12 69

Finland 3 56

UK 1 42

Netherlands 6 42

Lithuania 0 39

France 4 34

Italy 2 26

Slovenia 1 24

Germany 2 24

Ireland 2 23

Hungary 0 19

Russia 1 17

Greece 1 12

Poland 12

Ukraine 9

Romania 0

Canada 3 51

Chile 0 24

USA 1 18

Colombia 8

Indonesia 20 81

Malaysia 8 66

India 14 66

Thailand 6 62

China 4 51

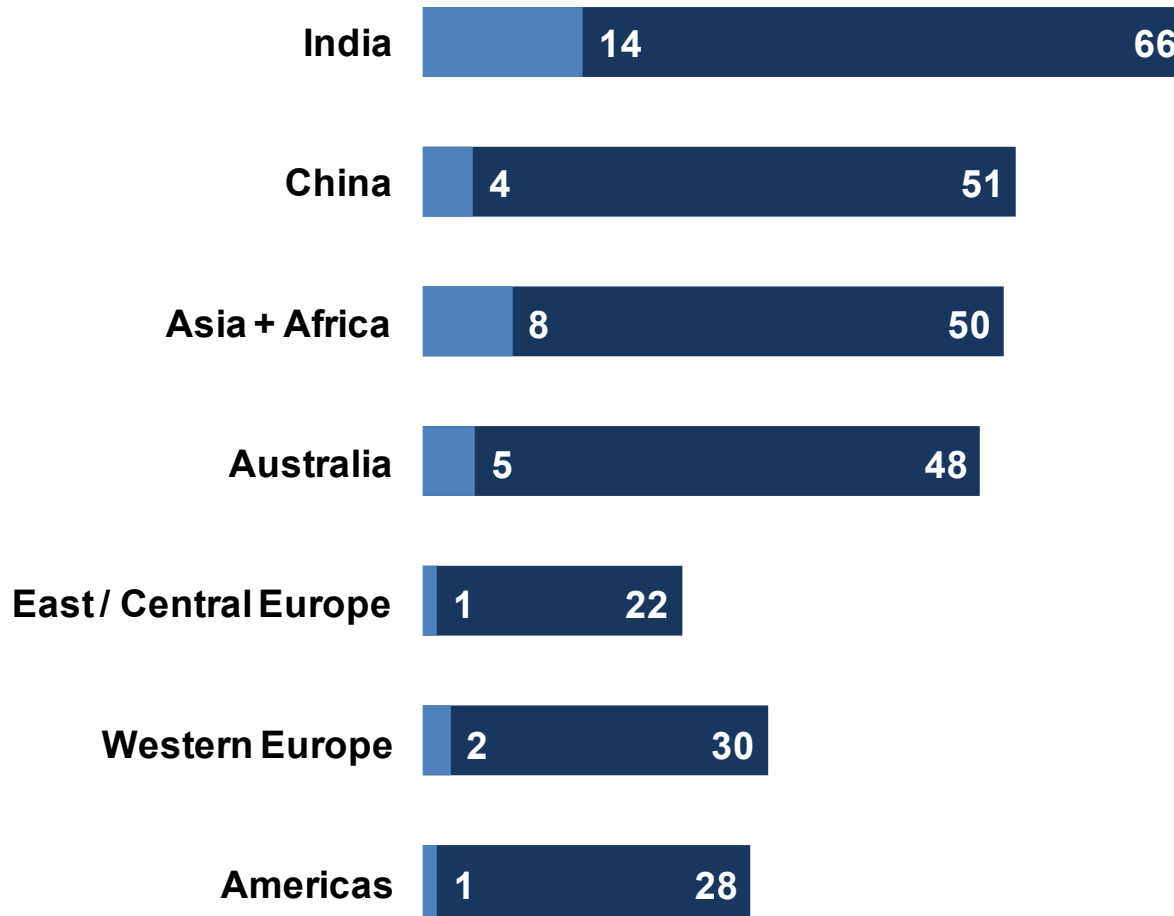
Pakistan 3 23

Egypt 7

Australia 5 48

Regional Healthcare System Evaluation

■ Excellent ■ Very good shape



Approval of National Healthcare System Management

■ Strongly approve ■ Somewhat approve

All Countries 6 34

Turkey 47 77

Finland 2 41

Netherlands 4 41

UK 3 37

Hungary 4 35

Russia 4 32

France 5 32

Ireland 5 32

Slovenia 1 24

Lithuania 1 23

Italy 1 20

Greece 5 19

Germany 2 17

Poland 2 16

Ukraine 1 11

Romania 5

Canada 2 42

Chile 2 30

USA 4 29

Colombia 1 19

Indonesia 31 83

India 27 78

Malaysia 20 72

China 3 54

Thailand 6 53

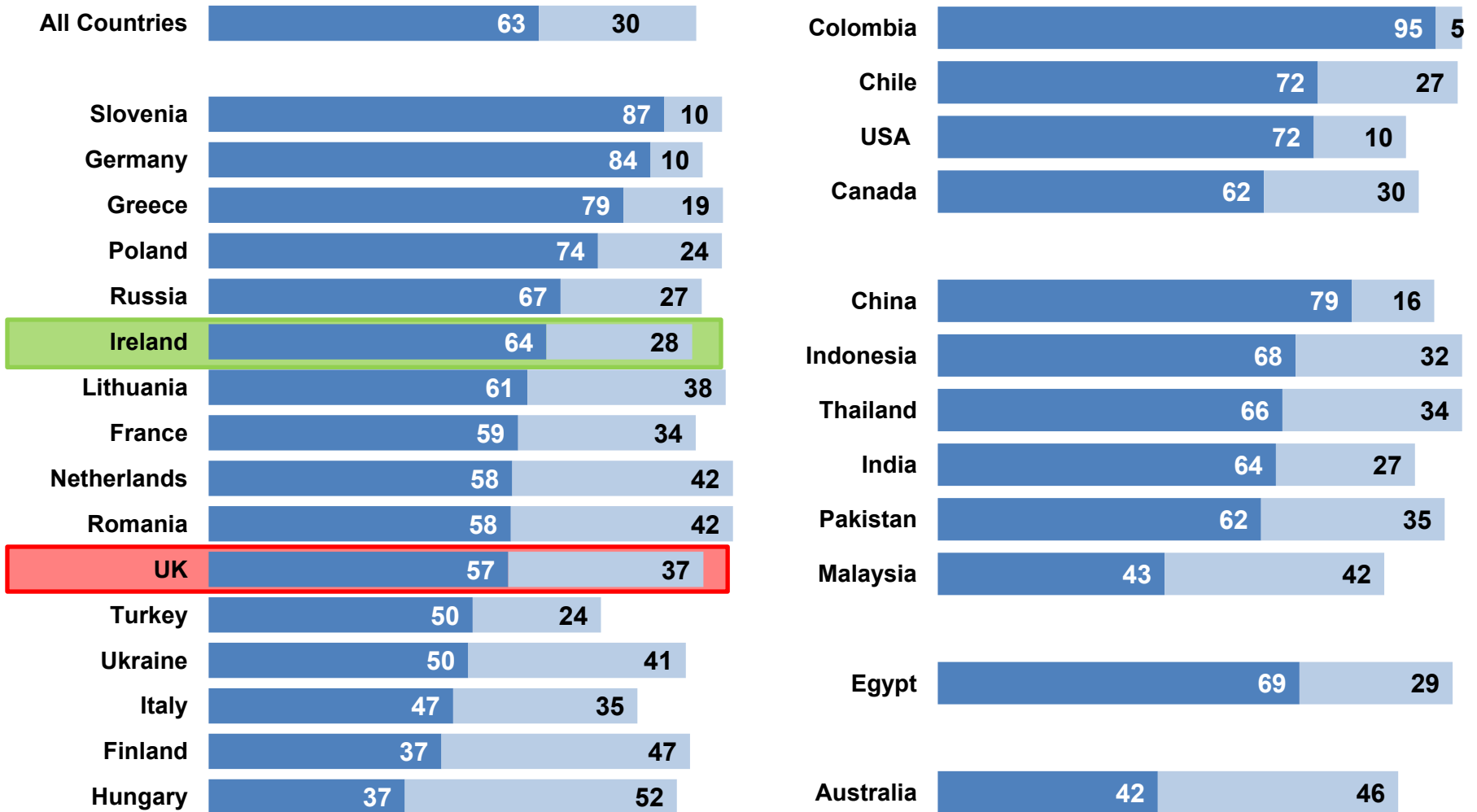
Pakistan 0 25

Egypt 4 17

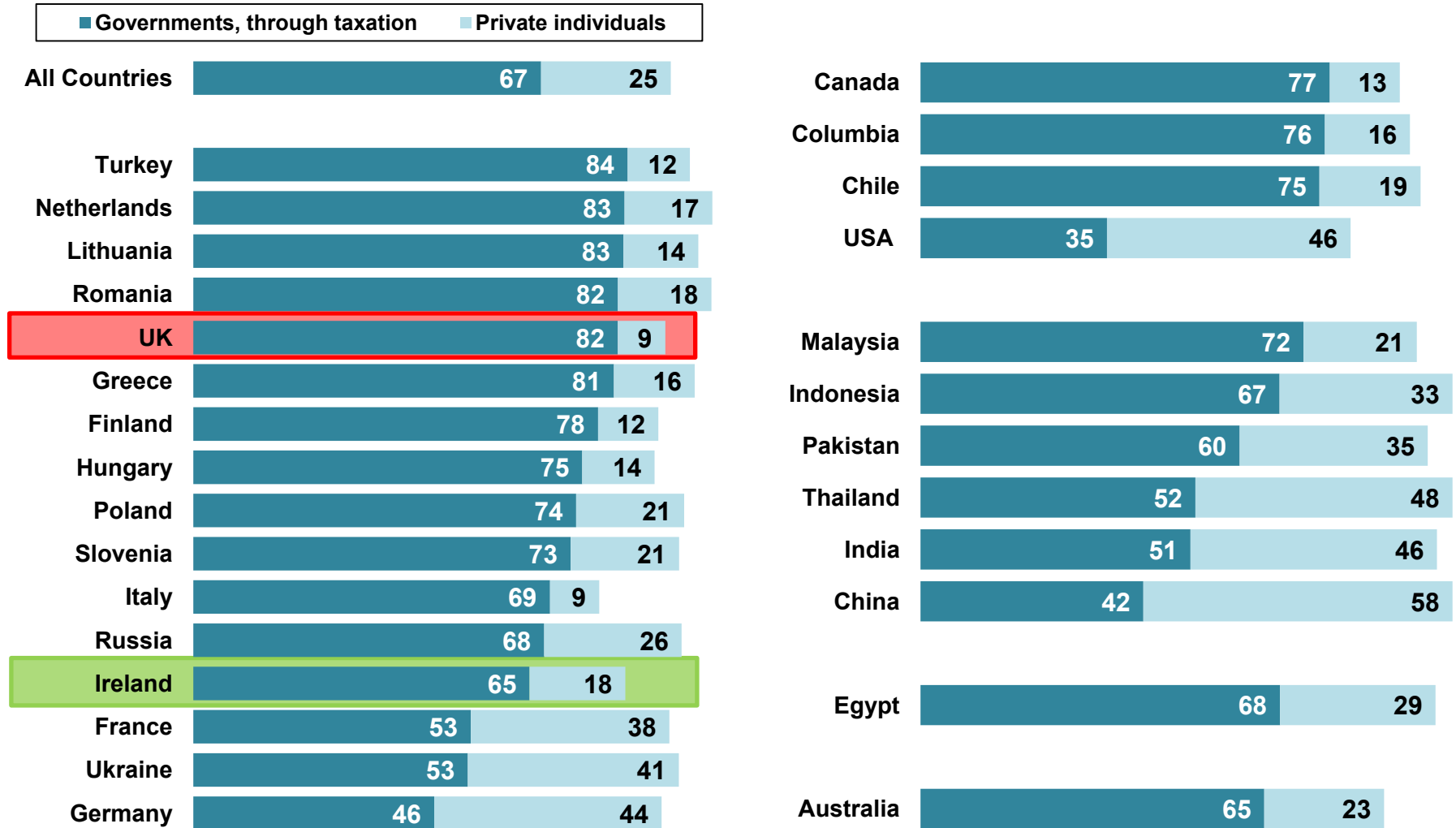
Australia 6 39

Source of Problems in the Healthcare System

■ Inefficient management ■ Not enough funding



Funding Preference: Health Expenses of Individuals



Health Contributors

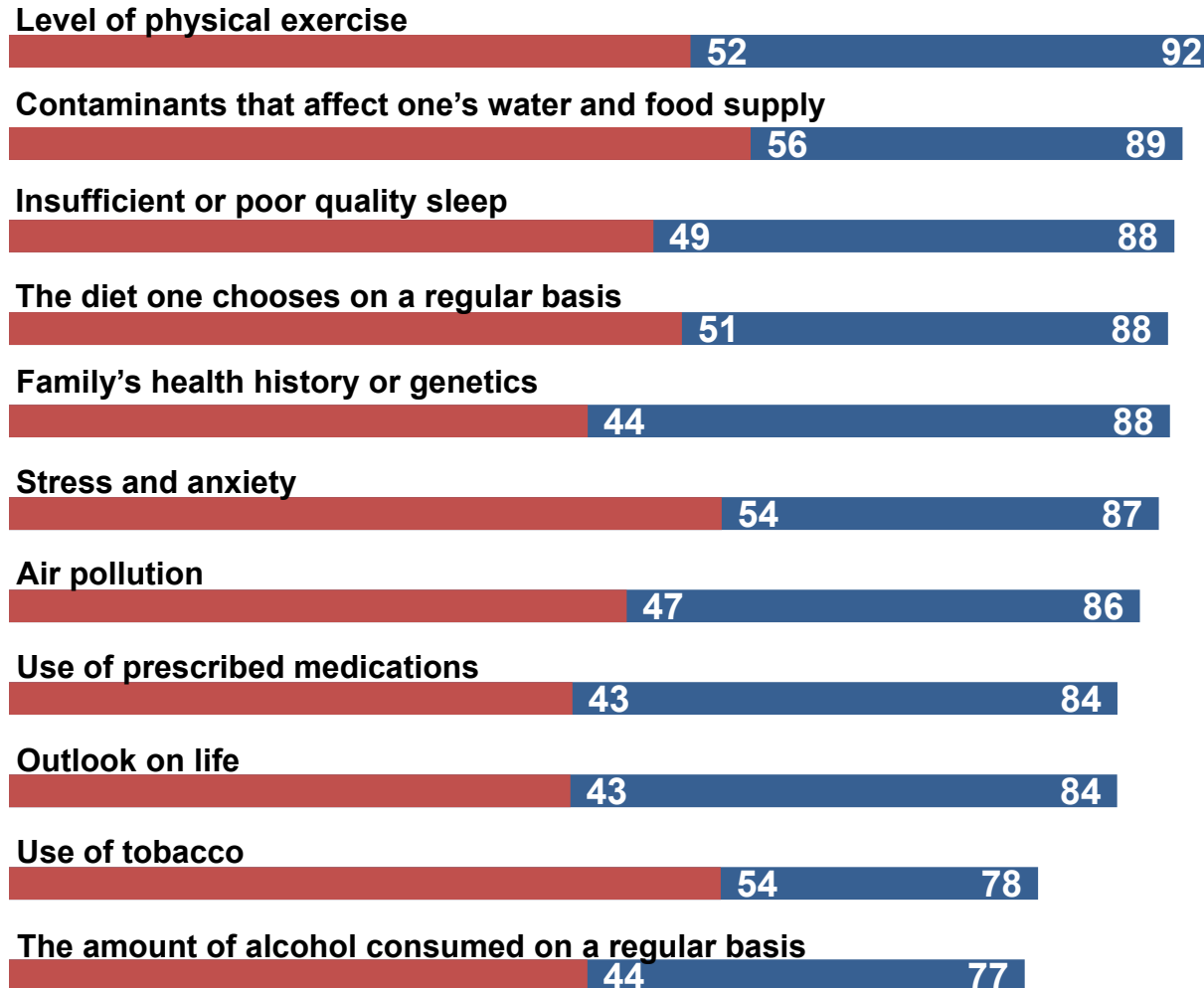


Global Behavioural & Attitudinal Differences

- Interesting differences across continents in relation to tobacco, alcohol, diet and other perceived contributors.
- European and American obsessiveness or fastidiousness.
- Asian ignorance in relation to some key contributors.
- Key implications for public health initiatives.

Factors Contributing to Health

■ Very important ■ Somewhat important

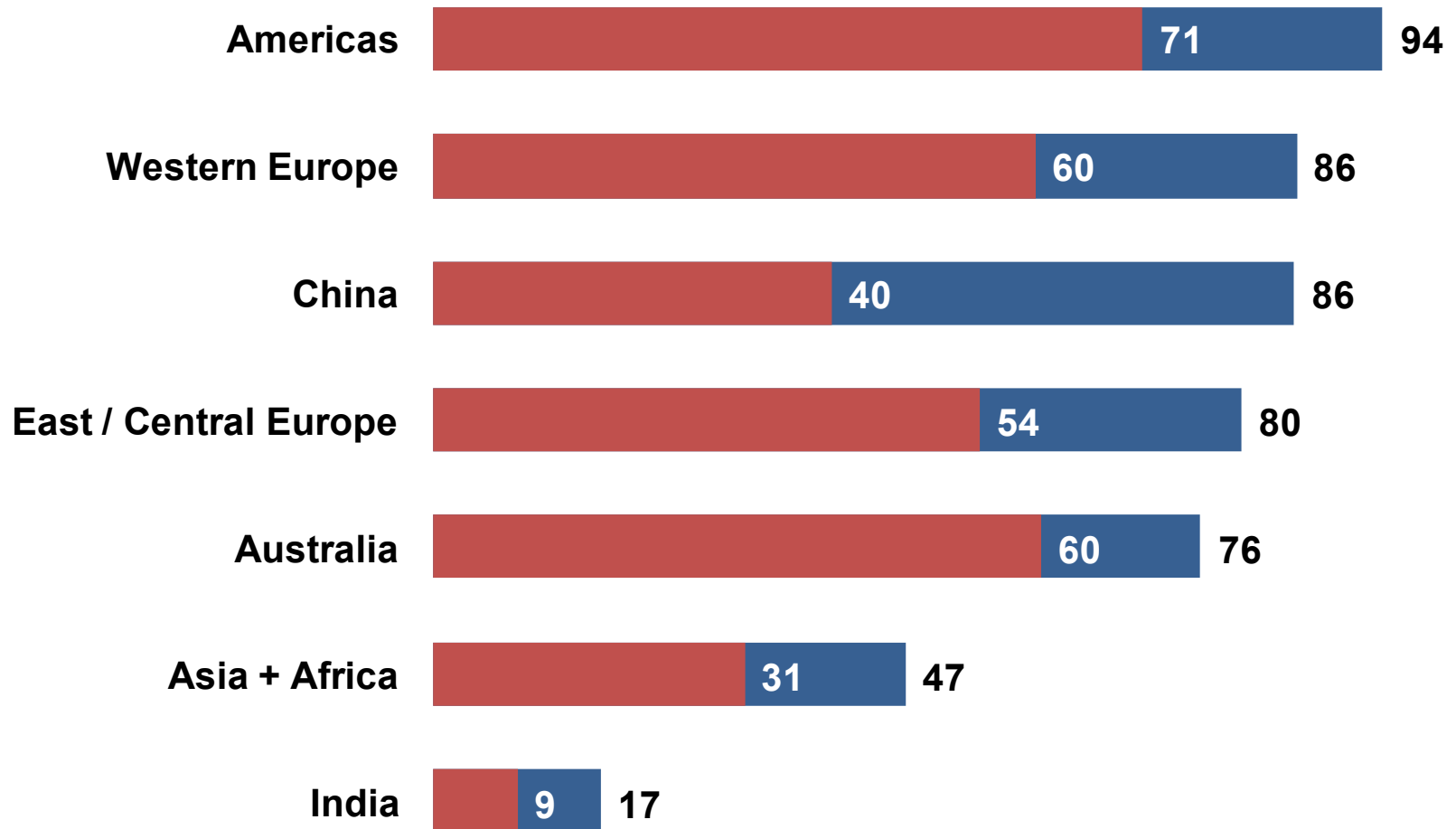


Very Important Contributors to Health by Region

	Global	India	China	Asia + Africa	Australia	East /Central Europe	Western Europe	Americas
TOTAL	22490	1056	1000	2266	910	4956	9137	3165
Contaminants that affect one's water and food supply	56%	40%	54%	63%	41%	61%	55%	58%
Stress and anxiety	54%	16%	46%	37%	52%	59%	56%	69%
Use of tobacco	54%	9%	40%	31%	60%	54%	60%	71%
Level of physical exercise	52%	54%	39%	62%	46%	52%	47%	61%
The diet one chooses on a regular basis	51%	67%	53%	56%	56%	47%	47%	60%
Insufficient or poor quality sleep	49%	36%	52%	51%	47%	52%	46%	56%
Air pollution	47%	40%	40%	58%	27%	53%	44%	48%
Family's health history or genetics	44%	38%	44%	42%	38%	46%	42%	51%
The amount of alcohol consumed on a regular basis	44%	9%	28%	26%	47%	47%	49%	53%
Use of prescribed medications	43%	60%	22%	54%	34%	42%	40%	48%
Outlook on life	43%	43%	30%	44%	42%	42%	39%	57%

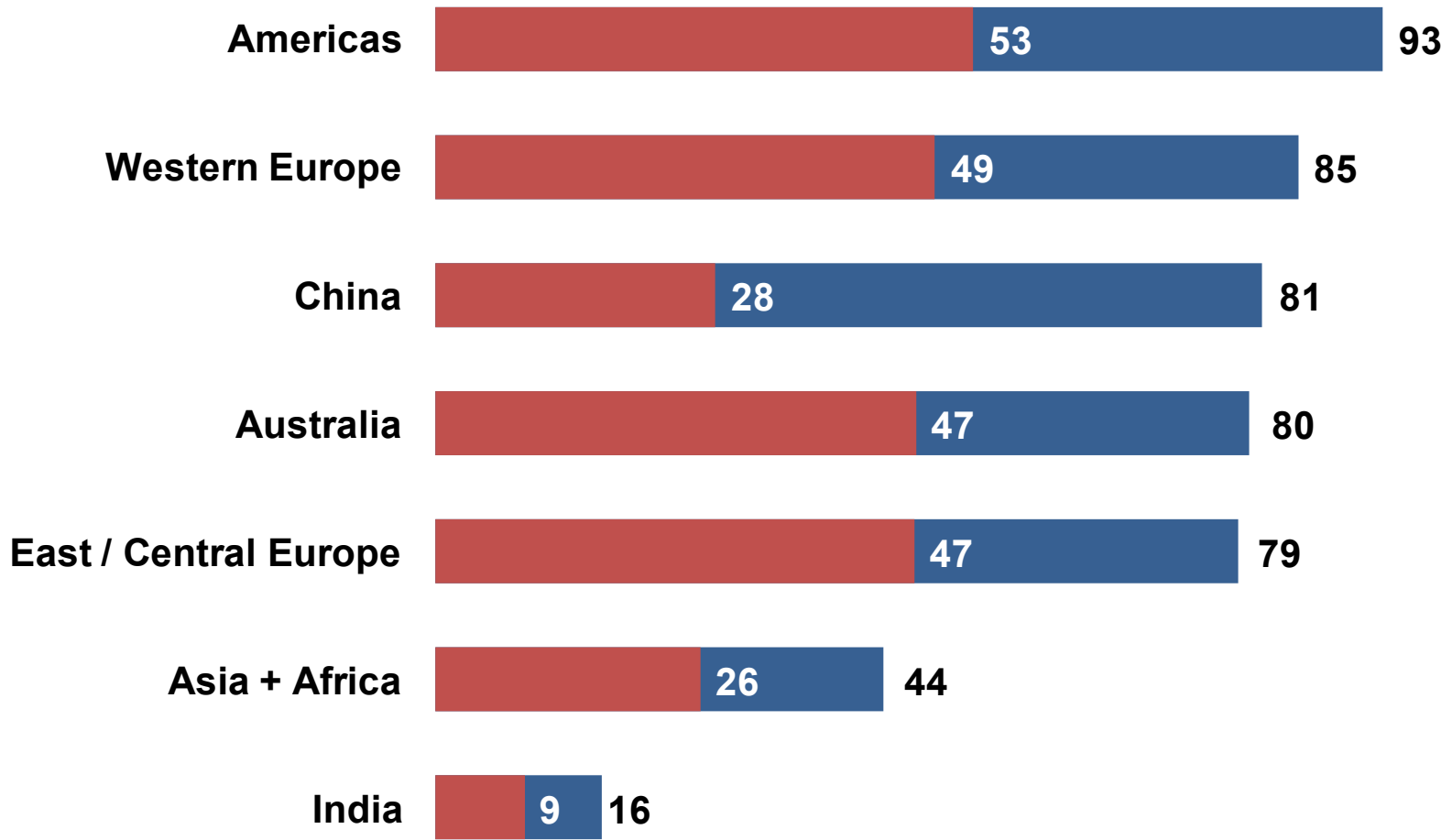
Tobacco as a Health Contributor x Region

■ Very important ■ Somewhat important



Alcohol Consumption as a Health Contributor

■ Very important ■ Somewhat important



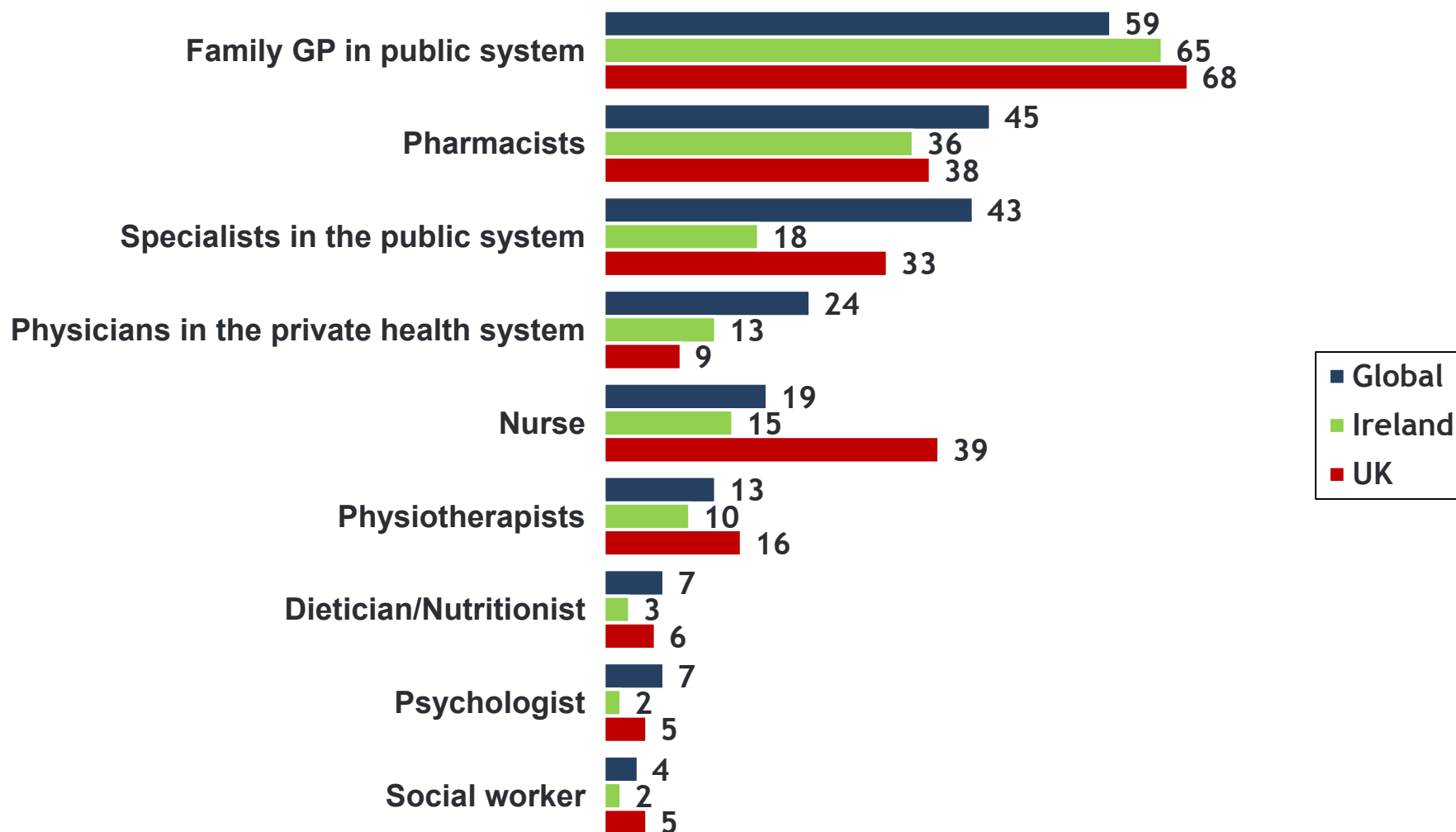
Good Doctor/Bad System?



A Health Paradox

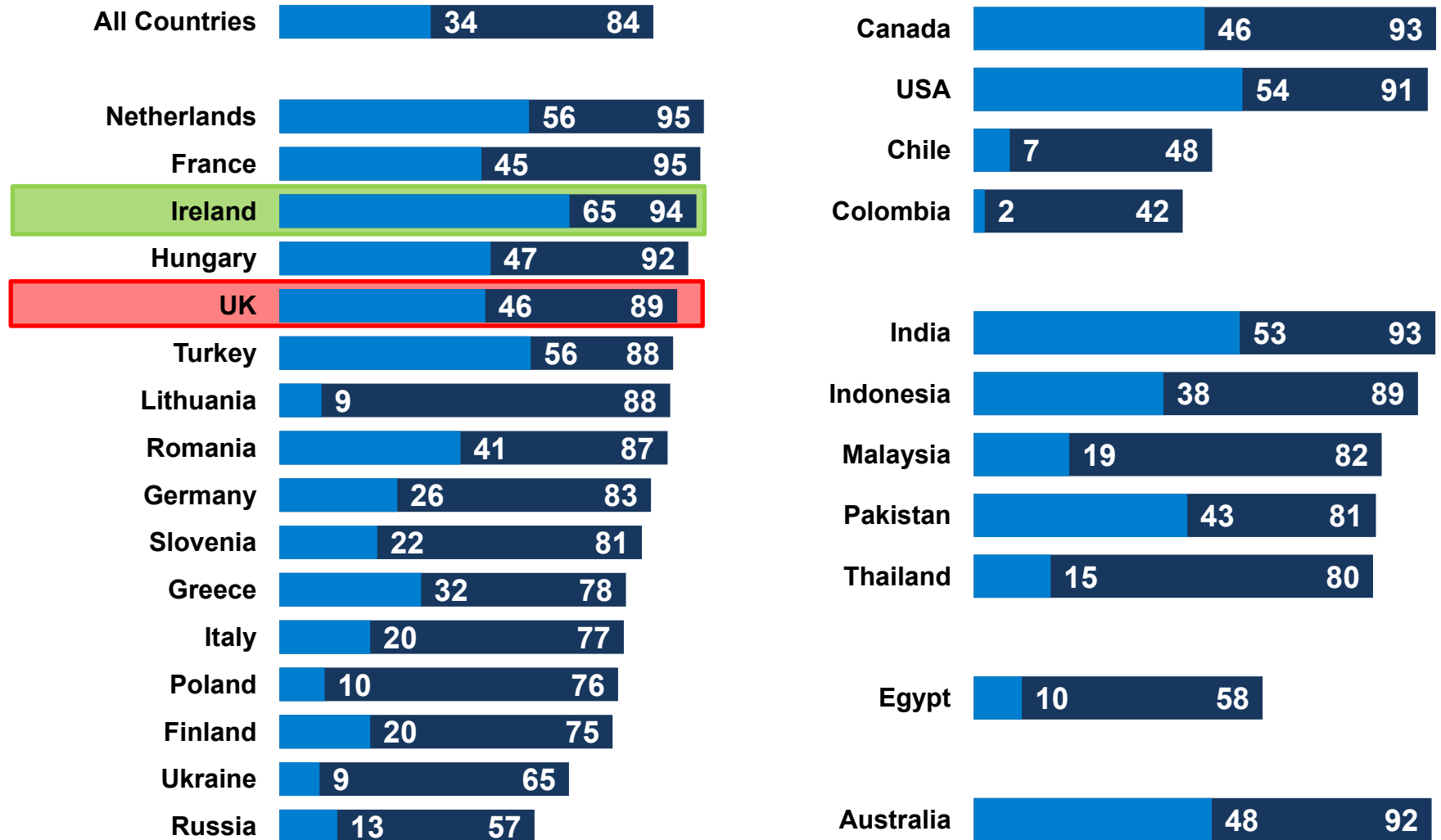
- A relatively poor perspective of the health system is accepted.
- In contrast, the family physician is very positively perceived.
- Suggests a common **hardware/software** conundrum, or perhaps an explicable **manager/carer** issue.
- Is the public simplistic in its analysis? Should the system be more obviously managed by HCPs rather than bureaucrats.

Usage of Key HCPs for Health Related Services in Past Year



Satisfaction with the Family Physician

■ Very satisfied ■ Satisfied at all



China was not included in this question



Search & Information Behaviour

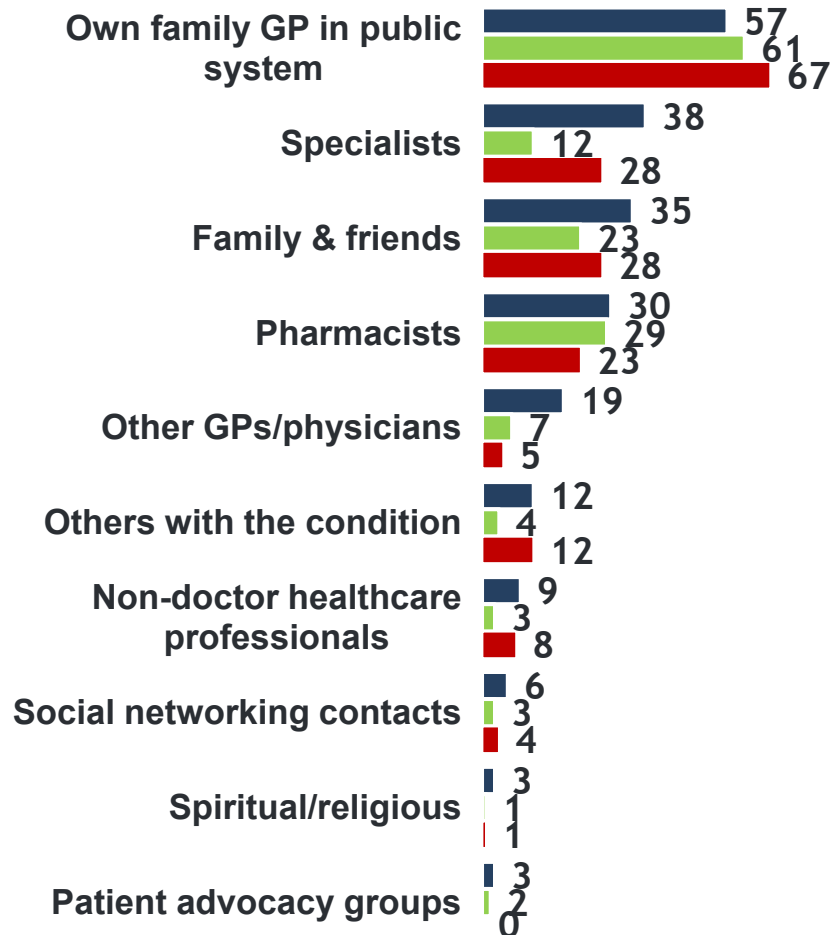
Finding out about Health

- Primary information sources are predictable HCPs, but extent of consultation with less generalist physicians varies very widely.
- Variation in online usage is enormous: British internet use highly developed while Irish levels are much lower.
- Sites such as Wikipedia have enormous cachet.

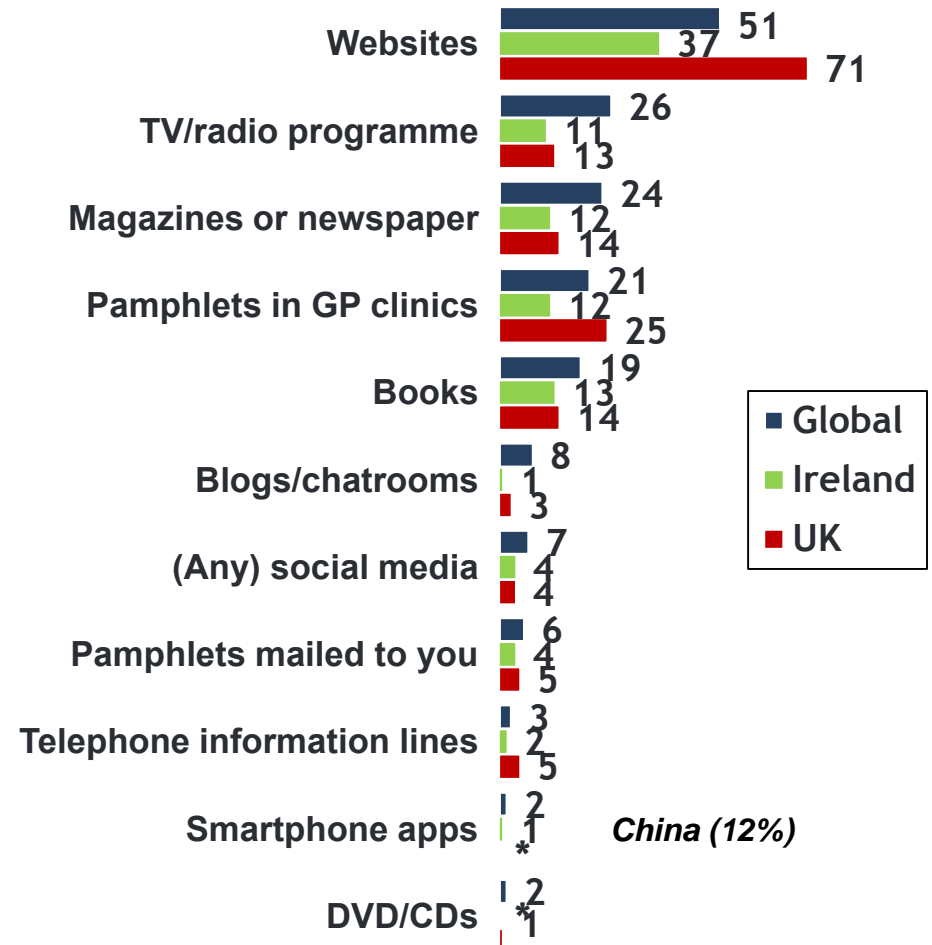
Consulted In Past Year On Health Issues That Concern You Most

Used To Get Information On Health Issues That Concern You Most

Consulted in past year



Used as way to get information



The internet is a significant secondary source but much higher in some countries
(Germany & UK 71%, USA 79%, China 69%)

Secondary Sources by Region

	Web-sites	TV or radio	Magazines or newspapers	Brochures from physicians' offices or clinics	Books	Blogs and/or chat rooms on the internet	Social media (Facebook, Twitter etc)
Global	51	26	24	21	19	8	7
India	7	51	33	7	21	1	2
China	69	61	47	23	53	23	25
Asia + Africa	40	46	38	23	23	9	18
Australia	70	14	14	28	18	8	5
East / Central Europe	47	28	26	21	18	10	5
Western Europe	48	18	18	19	14	6	4
Americas	77	18	20	27	21	8	5



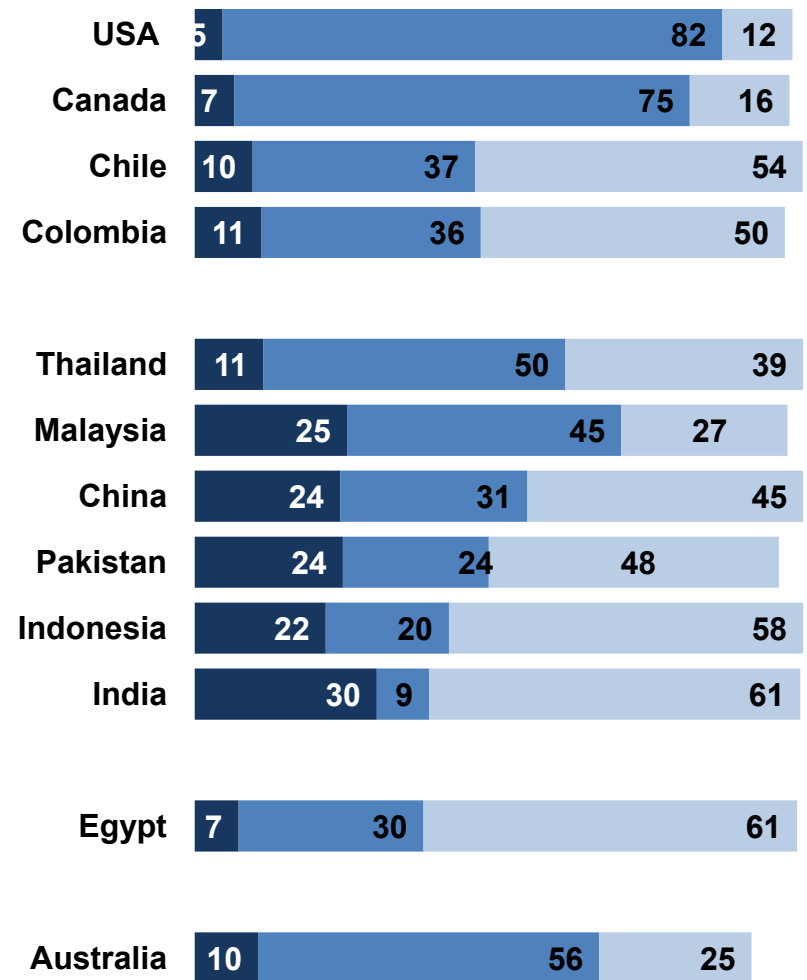
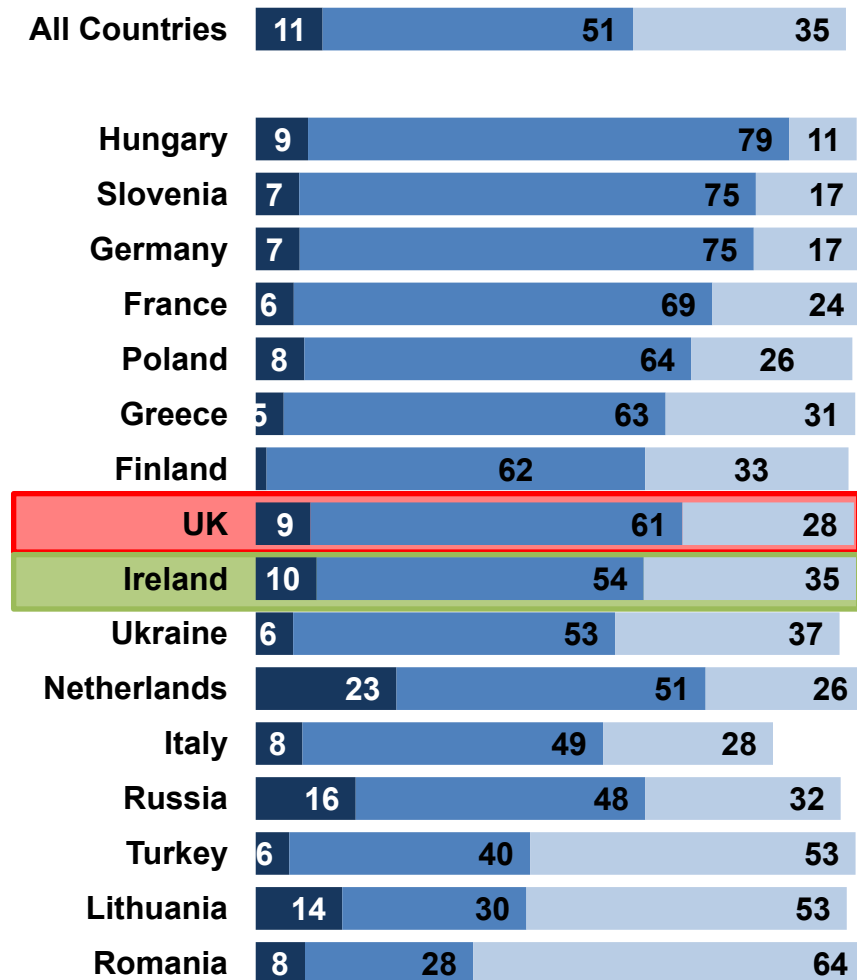
The Assertive Patient

Input to Treatment

- Indicated as one of the significant coming trends.
- Desired control of own treatment more in evidence where there are better treatment choices or options (Netherlands).
- Evidently a middle aged, mid/upper class, affluent, better educated phenomenon.

Patient Input into Treatment Decisions

- You decide
- Work with physician
- Physician makes decision



Actual & Perceived Health

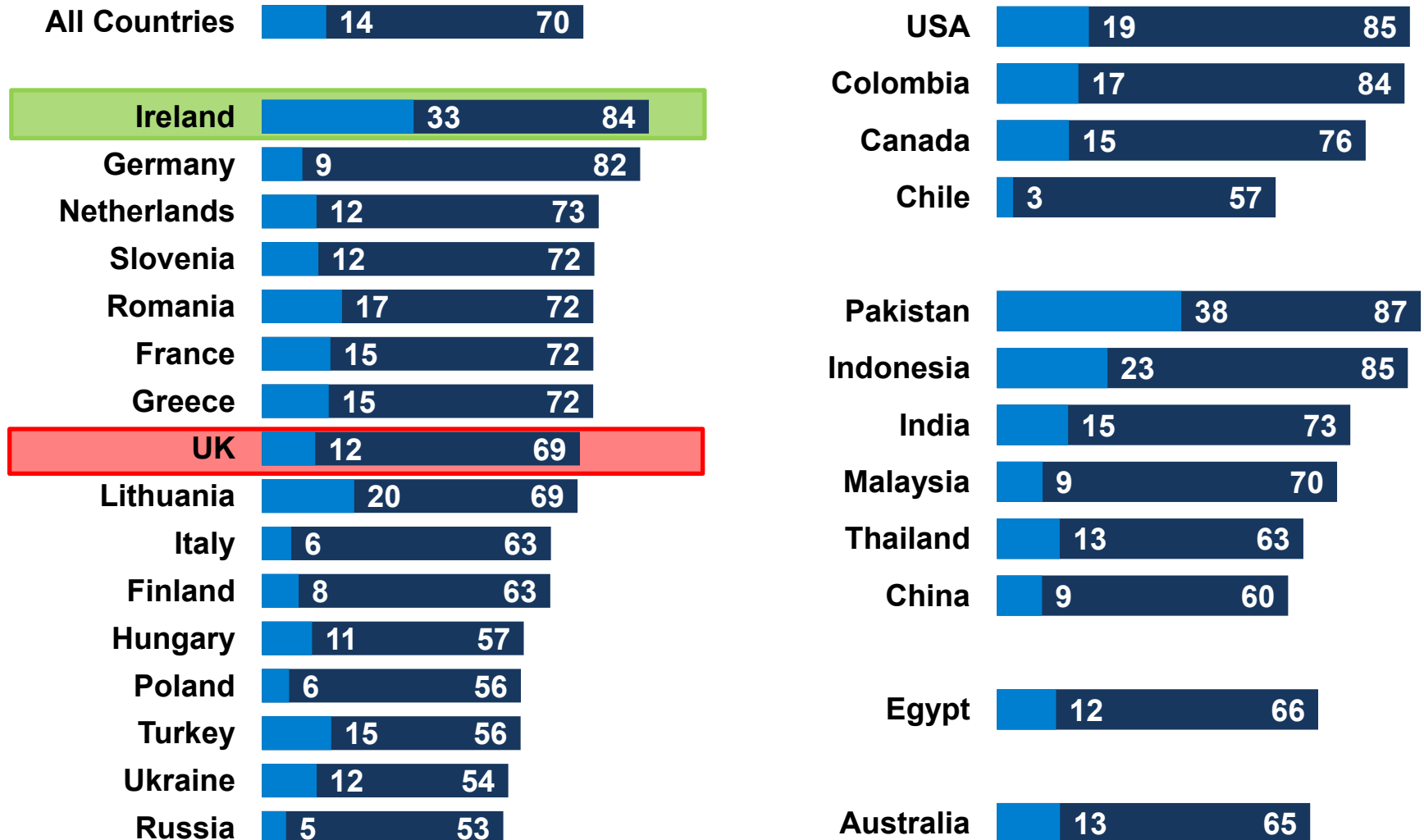


Actual/Perceived Health Patterns

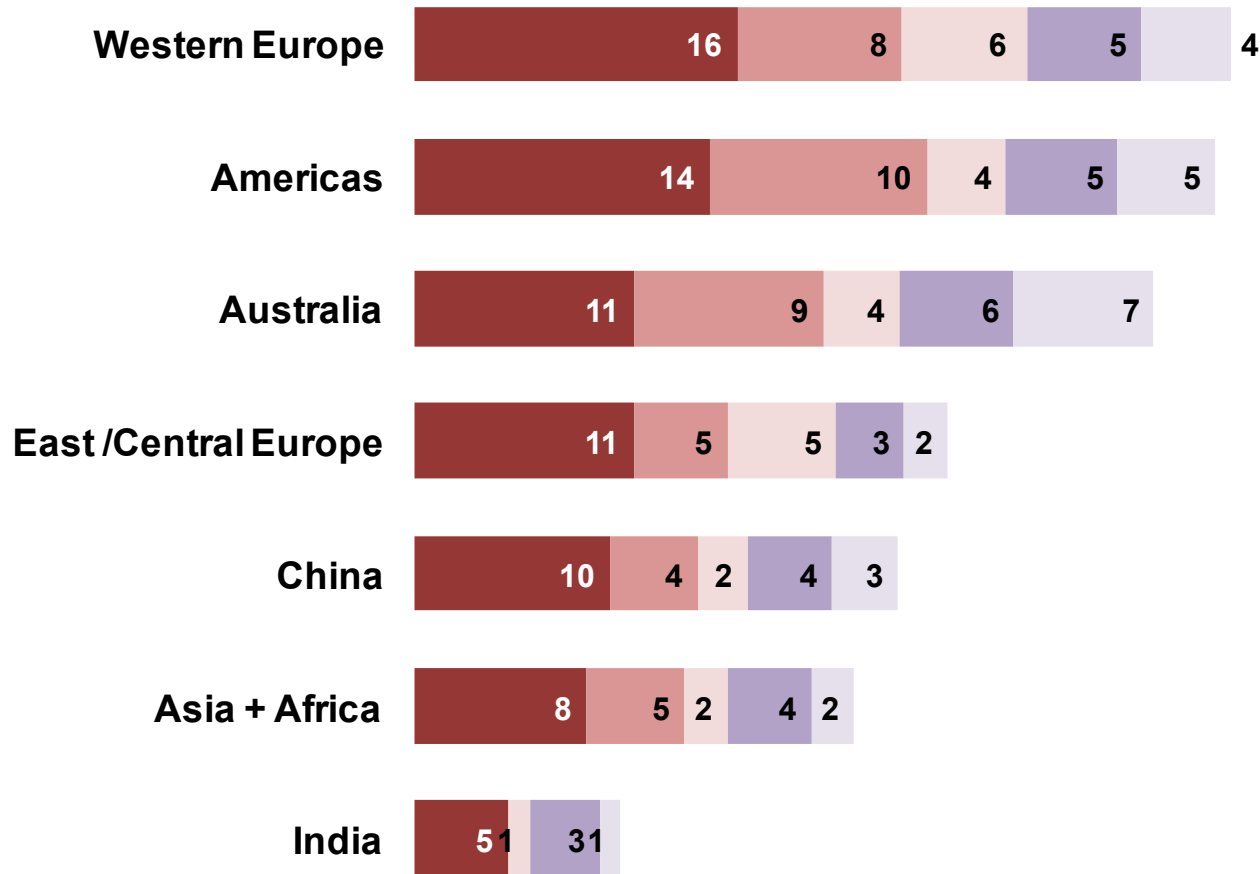
- Many feel that they are in good general health: perceived health measures are strong.
- Claimed incidences of long term serious conditions vary very substantially.
- Inter-relationship of perceived and actual health data illustrates some broad relationships but equally some more perplexing conundrums.
- We can categorise a **First World Paradox** of high incidence/high health but equally the probability of poorer detection (Ireland).

Perceived Personal Health Assessment

■ Excellent ■ Good

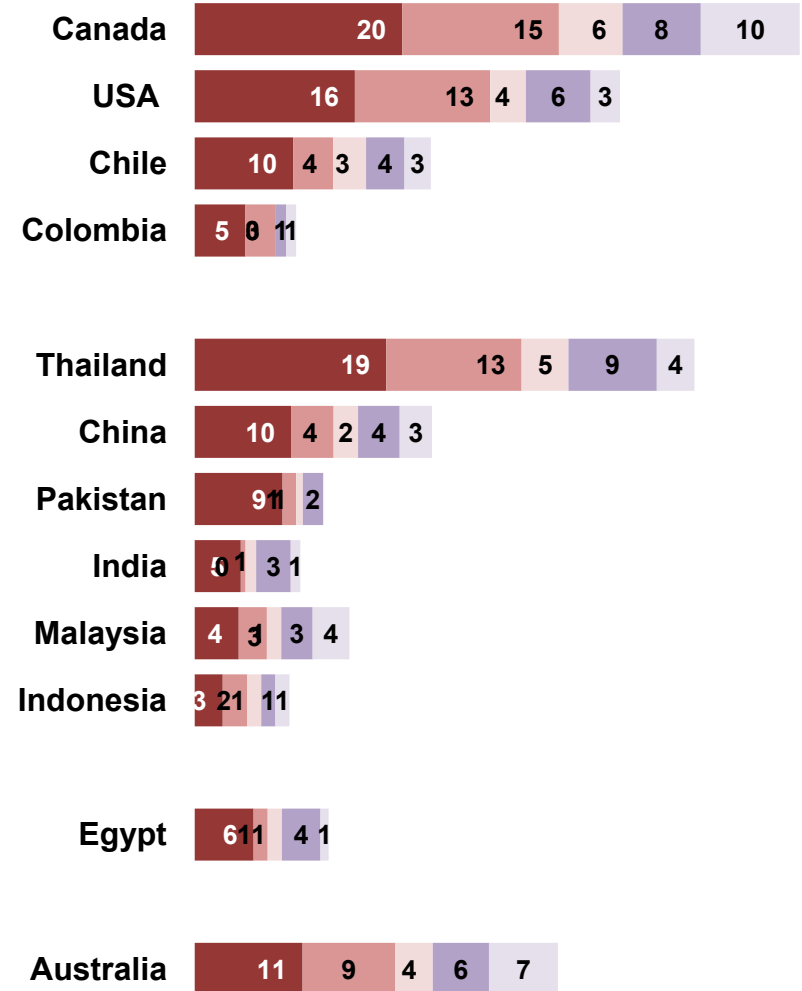
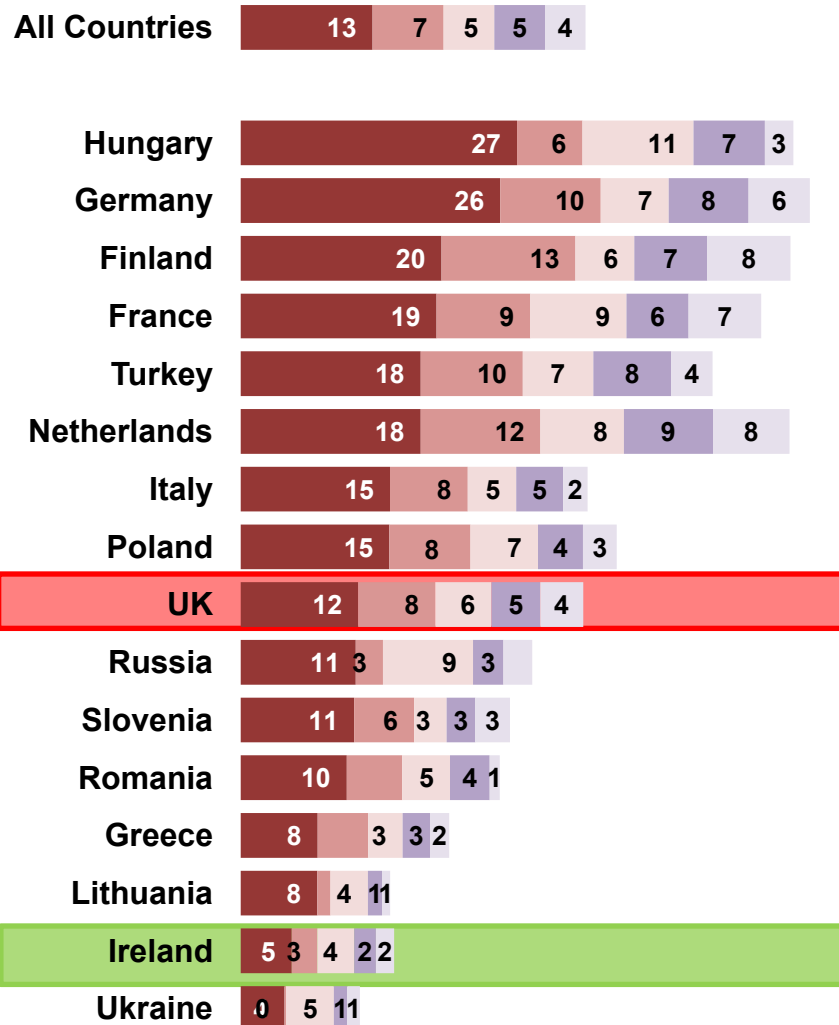


Top 5 Chronic Conditions by Region



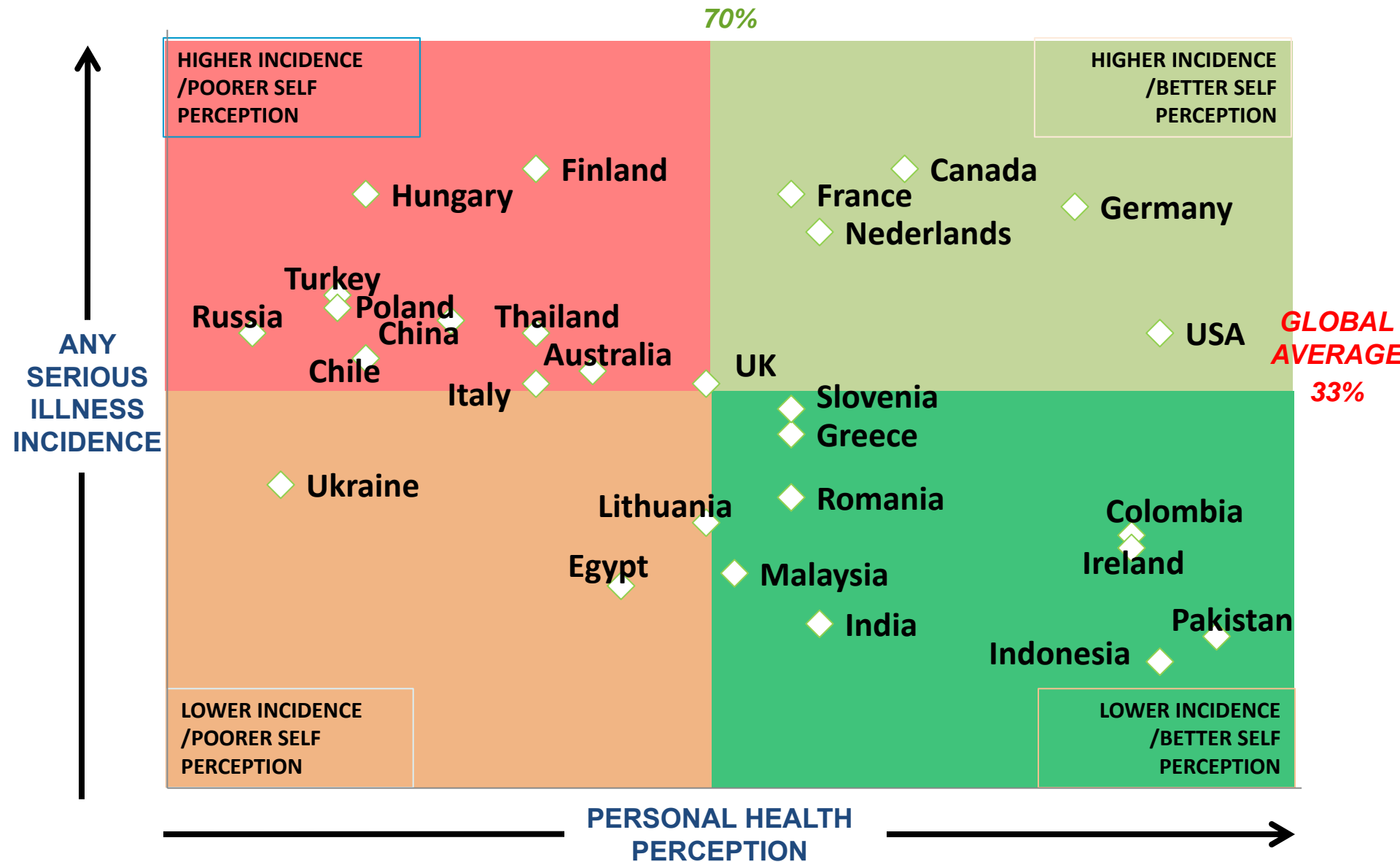
■ High blood pressure ■ High cholesterol ■ Heart condition ■ Diabetes ■ Asthma

Chronic Conditions by Country (Top 5)



High blood pressure High cholesterol Heart condition Diabetes Asthma

Actual & Perceived Health Contrast





Key Thoughts

Key Thoughts

- Global variation in need but with much basic commonality.
- Study helps to better illustrate global threats posed by local ignorance and the need for better regulation.
- Transformative effect of online.
- The rise of the assertive patient.
- Differences in detection rates and in HCP use.
- Need for better PR for health systems.



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