# Global Views On Healthcare – 2018

What does the world think about healthcare?

## IPSOS GLOBAL ADVISOR

**GAME CHANGERS**  Ipsos
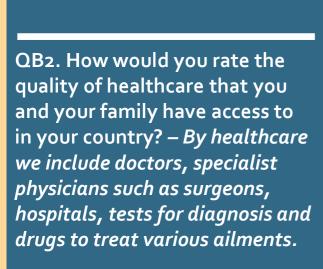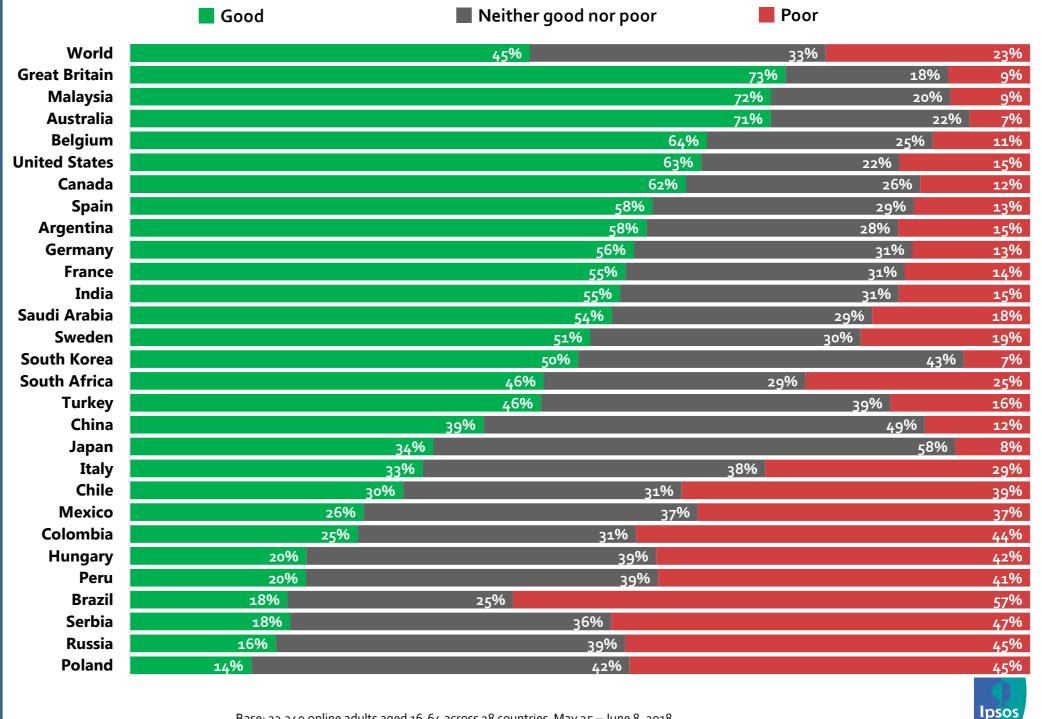
- The findings come from surveys conducted in 2018 on the Ipsos Global Advisor platform using the Ipsos Online Panel system.

- The survey comprising questions A1-A5 was conducted between April 20 and May 4, 2018 with 20,767 adults across 27 countries: Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States.

- The survey comprising questions B1-B13 was conducted between May 25 and June 8, 2018 with 23,249 adults across 28 countries (the same as above plus Colombia).

- All survey respondents are aged 18-64 in Canada and the U.S. and 16-64 in all other countries .

- The sample size per country in each survey is approximately N=1,000 for Australia, Brazil, Canada, China, France, Italy, Japan, Malaysia, Spain, Germany, Great Britain, and the U.S., and approximately N=500 for Argentina, Belgium, Colombia, Chile, Hungary, India, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Sweden, and Turkey.

- Weighting has been employed to balance demographics and 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 of this size 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 for a 500 sample 19 times out of 20.

- In 17 of the countries surveyed ,internet penetration is sufficiently high to think of the samples as representative of the national population within the age ranges covered: Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, Serbia, South Korea, Spain, Sweden, Great Britain, and U.S.

  Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Russia, Peru, Saudi Arabia, South Africa, and Turkey have lower levels of internet penetration. Samples from those countries should not be considered to be fully nationally representative, but instead to represent a more affluent, connected population, representing an important and emerging middle class.

- Results may not always sum to 100% or may be 1 point higher/lower than the actuals due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

# Evaluating The Healthcare System

Do citizens feel like their healthcare system works to keep them healthy?

## IPSOS GLOBAL ADVISOR

**GAME CHANGERS**  Ipsos

# Quality Rating of Locally Accessible Healthcare

**Legend:** 🟩 Good  ⬛ Neither good nor poor  🟥 Poor

| Country | Good | Neither good nor poor | Poor |
|---|---|---|---|
| World | 45% | 33% | 23% |
| Great Britain | 73% | 18% | 9% |
| Malaysia | 72% | 20% | 9% |
| Australia | 71% | 22% | 7% |
| Belgium | 64% | 25% | 11% |
| United States | 63% | 22% | 15% |
| Canada | 62% | 26% | 12% |
| Spain | 58% | 29% | 13% |
| Argentina | 58% | 28% | 15% |
| Germany | 56% | 31% | 13% |
| France | 55% | 31% | 14% |
| India | 55% | 31% | 15% |
| Saudi Arabia | 54% | 29% | 18% |
| Sweden | 51% | 30% | 19% |
| South Korea | 50% | 43% | 7% |
| South Africa | 46% | 29% | 25% |
| Turkey | 46% | 39% | 16% |
| China | 39% | 49% | 12% |
| Japan | 34% | 58% | 8% |
| Italy | 33% | 38% | 29% |
| Chile | 30% | 31% | 39% |
| Mexico | 26% | 37% | 37% |
| Colombia | 25% | 31% | 44% |
| Hungary | 20% | 39% | 42% |
| Peru | 20% | 39% | 41% |
| Brazil | 18% | 25% | 57% |
| Serbia | 18% | 36% | 47% |
| Russia | 16% | 39% | 45% |
| Poland | 14% | 42% | 45% |

**QB2. 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.*

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

**Opinion on Healthcare System – Wait Times Too Long**

QB4. To what extent do you agree with the following statement? – *Waiting times to get an appointment with doctors are too long in my country.*

Legend: Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree)

| Country | Agree | Neither | Disagree | Net score |
|---|---|---|---|---|
| World | 60% | 24% | 16% | +44 |
| Serbia | 91% | 5% | 4% | +87 |
| Hungary | 78% | 13% | 9% | +69 |
| Chile | 77% | 11% | 11% | +66 |
| Poland | 77% | 12% | 11% | +66 |
| Peru | 75% | 13% | 12% | +63 |
| Colombia | 74% | 12% | 14% | +60 |
| Mexico | 74% | 15% | 11% | +63 |
| Brazil | 73% | 15% | 12% | +61 |
| Spain | 70% | 21% | 9% | +61 |
| Italy | 70% | 22% | 8% | +62 |
| Russia | 66% | 20% | 14% | +52 |
| Germany | 65% | 25% | 10% | +55 |
| Argentina | 64% | 24% | 12% | +52 |
| Canada | 62% | 25% | 13% | +49 |
| Great Britain | 62% | 27% | 12% | +50 |
| Malaysia | 61% | 25% | 14% | +47 |
| Sweden | 59% | 27% | 14% | +45 |
| India | 55% | 29% | 16% | +39 |
| China | 54% | 31% | 15% | +39 |
| South Africa | 54% | 23% | 23% | +31 |
| France | 53% | 29% | 18% | +35 |
| Turkey | 51% | 17% | 33% | +18 |
| Saudi Arabia | 50% | 28% | 22% | +28 |
| Japan | 47% | 41% | 12% | +35 |
| Australia | 43% | 33% | 24% | +19 |
| United States | 41% | 34% | 25% | +16 |
| South Korea | 38% | 35% | 26% | +12 |
| Belgium | 38% | 43% | 20% | +18 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Opinion on Healthcare System – Quality Healthcare Unaffordable for Many People

**QB4. To what extent do you agree or disagree with the following statement? –** *Many people in my country cannot afford good healthcare.*

Legend: ■ Agree  ■ Neither agree nor disagree  ■ Disagree   ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 58% | 23% | 19% | +39 |
| South Africa | 83% | 8% | 8% | +75 |
| Serbia | 82% | 9% | 9% | +73 |
| Chile | 81% | 8% | 11% | +70 |
| Colombia | 78% | 10% | 12% | +66 |
| Hungary | 77% | 14% | 9% | +68 |
| Peru | 77% | 9% | 14% | +63 |
| United States | 75% | 16% | 9% | +66 |
| Mexico | 75% | 11% | 14% | +61 |
| Russia | 75% | 14% | 12% | +63 |
| Brazil | 74% | 15% | 12% | +62 |
| Poland | 73% | 15% | 12% | +61 |
| India | 72% | 18% | 10% | +62 |
| Argentina | 70% | 16% | 14% | +56 |
| China | 63% | 26% | 11% | +52 |
| France | 60% | 28% | 13% | +47 |
| Turkey | 57% | 15% | 28% | +29 |
| Saudi Arabia | 56% | 27% | 17% | +39 |
| Italy | 54% | 32% | 14% | +40 |
| Spain | 52% | 27% | 21% | +31 |
| Malaysia | 51% | 25% | 24% | +27 |
| Australia | 46% | 33% | 21% | +25 |
| Japan | 44% | 43% | 14% | +30 |
| Germany | 40% | 33% | 27% | +13 |
| Belgium | 32% | 42% | 27% | +5 |
| Great Britain | 30% | 30% | 40% | -10 |
| South Korea | 28% | 42% | 30% | -2 |
| Canada | 27% | 35% | 38% | -11 |
| Sweden | 25% | 35% | 40% | -15 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

32

# Opinion on Healthcare System – Overstretched

**Legend:** ■ Agree ■ Neither agree nor disagree ■ Disagree ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 55% | 30% | 15% | +40 |
| Great Britain | 85% | 11% | 4% | +81 |
| Hungary | 80% | 14% | 6% | +74 |
| Sweden | 74% | 20% | 7% | +67 |
| Spain | 70% | 22% | 8% | +62 |
| Chile | 70% | 20% | 11% | +59 |
| France | 70% | 24% | 7% | +63 |
| Colombia | 69% | 18% | 13% | +56 |
| Canada | 67% | 26% | 8% | +59 |
| Brazil | 66% | 18% | 16% | +50 |
| Italy | 64% | 26% | 10% | +54 |
| Argentina | 60% | 27% | 13% | +47 |
| Peru | 60% | 24% | 16% | +44 |
| Australia | 60% | 33% | 8% | +52 |
| Mexico | 57% | 28% | 15% | +42 |
| South Africa | 57% | 31% | 12% | +45 |
| Germany | 55% | 32% | 13% | +42 |
| Russia | 52% | 36% | 12% | +40 |
| United States | 48% | 39% | 13% | +35 |
| Turkey | 46% | 18% | 36% | +10 |
| India | 46% | 39% | 15% | +31 |
| China | 43% | 37% | 20% | +23 |
| Malaysia | 42% | 33% | 25% | +17 |
| Saudi Arabia | 41% | 38% | 22% | +19 |
| Serbia | 39% | 39% | 22% | +17 |
| Belgium | 33% | 53% | 14% | +19 |
| Poland | 32% | 31% | 37% | -5 |
| South Korea | 24% | 51% | 25% | -1 |
| Japan | 15% | 62% | 23% | -8 |

QB4. To what extent do you agree or disagree with the following statement. – *The healthcare system in my country is overstretched.*

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Opinion on Healthcare System – Concerned about Personal Data Security

**QB4.** To what extent do you agree or disagree with the following statement? – *I am concerned that my personal data will be made available to third parties (government, private companies) without my consent.*

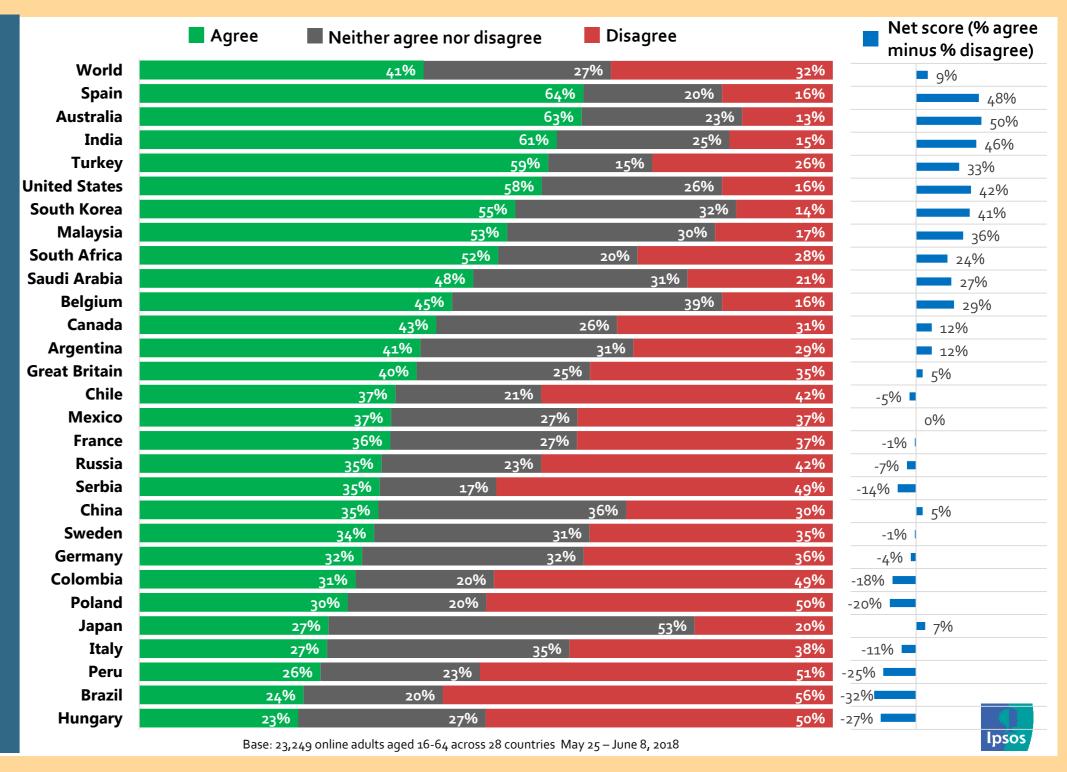| Country | ■ Agree | ■ Neither agree nor disagree | ■ Disagree | ■ Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 50% | 30% | 20% | +30 |
| Mexico | 67% | 18% | 15% | +52 |
| Peru | 65% | 20% | 15% | +50 |
| Turkey | 63% | 16% | 21% | +42 |
| Chile | 62% | 21% | 17% | +45 |
| China | 62% | 26% | 12% | +50 |
| Colombia | 59% | 25% | 16% | +43 |
| Malaysia | 59% | 26% | 15% | +44 |
| Russia | 59% | 23% | 18% | +41 |
| Spain | 57% | 29% | 14% | +43 |
| India | 56% | 26% | 18% | +38 |
| South Korea | 56% | 33% | 12% | +44 |
| United States | 54% | 29% | 17% | +37 |
| Brazil | 54% | 29% | 17% | +37 |
| South Africa | 53% | 29% | 18% | +35 |
| Argentina | 52% | 27% | 21% | +31 |
| Serbia | 48% | 29% | 23% | +25 |
| Poland | 47% | 27% | 26% | +21 |
| Saudi Arabia | 46% | 33% | 20% | +26 |
| Australia | 44% | 33% | 23% | +21 |
| Germany | 43% | 34% | 23% | +20 |
| Hungary | 43% | 31% | 27% | +16 |
| France | 41% | 37% | 23% | +18 |
| Great Britain | 41% | 34% | 26% | +15 |
| Canada | 39% | 34% | 28% | +11 |
| Italy | 34% | 40% | 26% | +8 |
| Belgium | 32% | 43% | 26% | +6 |
| Sweden | 31% | 31% | 38% | -7 |
| Japan | 31% | 53% | 16% | +15 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Opinion on Healthcare System – Easy to Get an Appointment

Legend: ■ Agree ■ Neither agree nor disagree ■ Disagree

Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 41% | 27% | 32% | 9% |
| Spain | 64% | 20% | 16% | 48% |
| Australia | 63% | 23% | 13% | 50% |
| India | 61% | 25% | 15% | 46% |
| Turkey | 59% | 15% | 26% | 33% |
| United States | 58% | 26% | 16% | 42% |
| South Korea | 55% | 32% | 14% | 41% |
| Malaysia | 53% | 30% | 17% | 36% |
| South Africa | 52% | 20% | 28% | 24% |
| Saudi Arabia | 48% | 31% | 21% | 27% |
| Belgium | 45% | 39% | 16% | 29% |
| Canada | 43% | 26% | 31% | 12% |
| Argentina | 41% | 31% | 29% | 12% |
| Great Britain | 40% | 25% | 35% | 5% |
| Chile | 37% | 21% | 42% | -5% |
| Mexico | 37% | 27% | 37% | 0% |
| France | 36% | 27% | 37% | -1% |
| Russia | 35% | 23% | 42% | -7% |
| Serbia | 35% | 17% | 49% | -14% |
| China | 35% | 36% | 30% | 5% |
| Sweden | 34% | 31% | 35% | -1% |
| Germany | 32% | 32% | 36% | -4% |
| Colombia | 31% | 20% | 49% | -18% |
| Poland | 30% | 20% | 50% | -20% |
| Japan | 27% | 53% | 20% | 7% |
| Italy | 27% | 35% | 38% | -11% |
| Peru | 26% | 23% | 51% | -25% |
| Brazil | 24% | 20% | 56% | -32% |
| Hungary | 23% | 27% | 50% | -27% |

QB4. To what extent do you agree or disagree with the following statements? – *I find it easy to get an appointment with doctors in my local area.*

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018
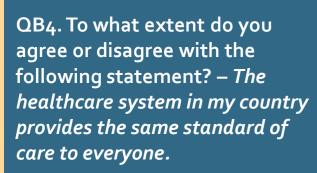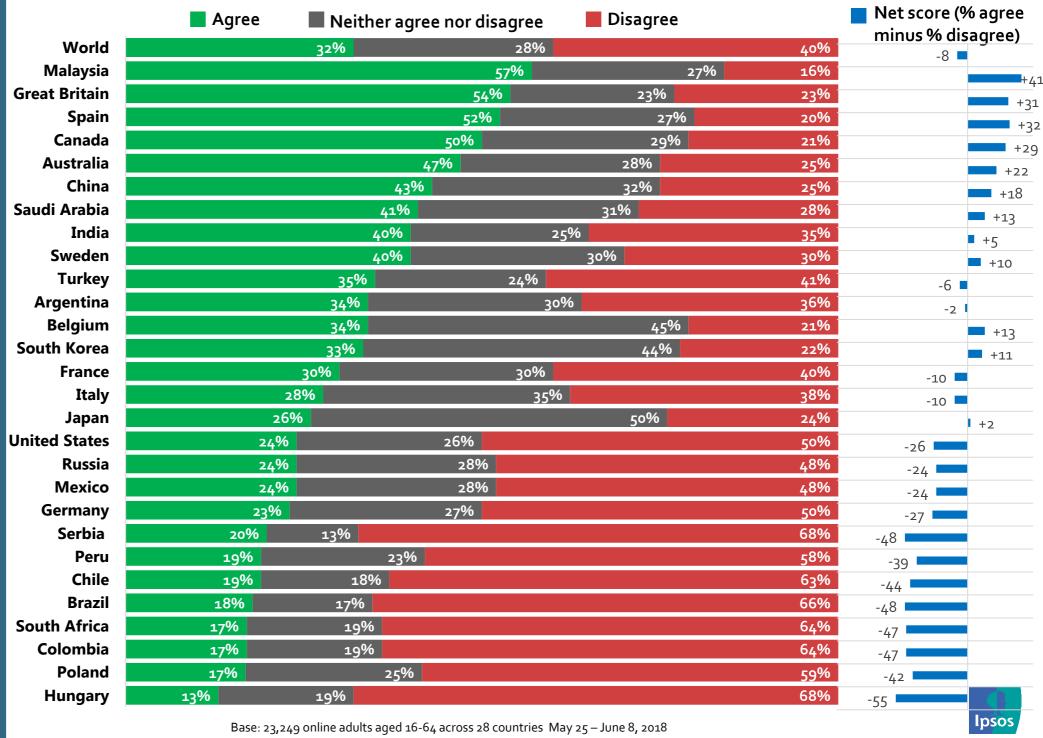
Ipsos

35

# Opinion on Healthcare System – Trust It to Provide Best Treatment

**QB4. To what extent do you agree or disagree with the following statement? – I trust the healthcare system in my country to provide me with the best treatment.**
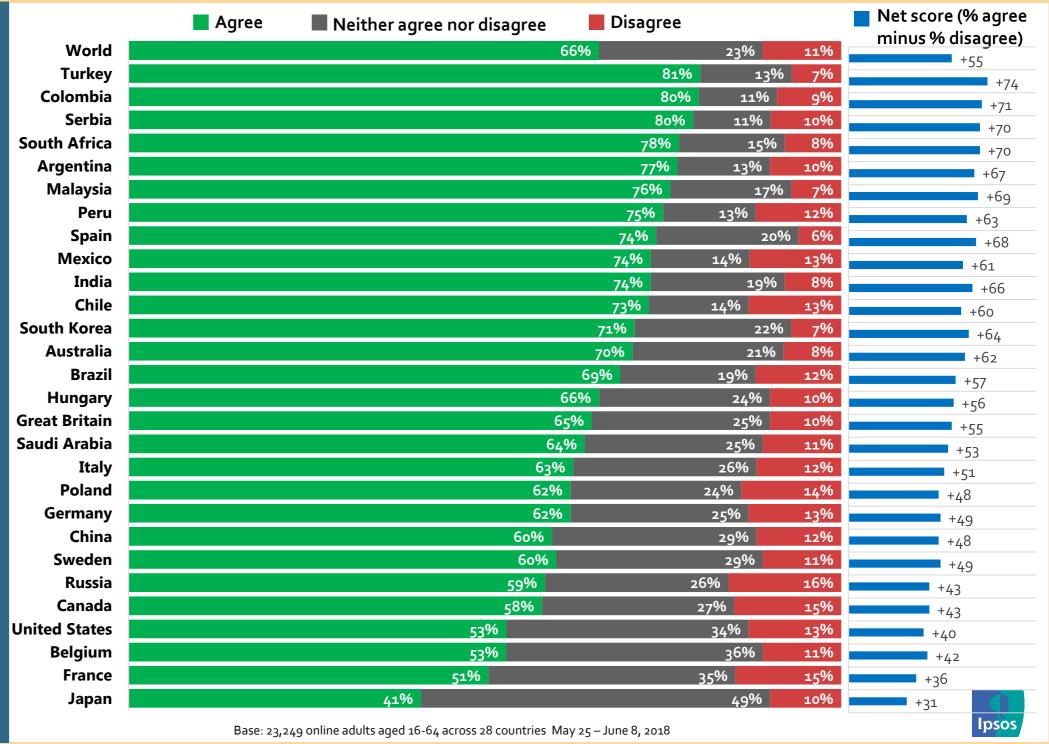
| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 41% | 31% | 28% | +13 |
| Spain | 64% | 26% | 10% | +54 |
| Great Britain | 63% | 24% | 13% | +50 |
| Malaysia | 63% | 25% | 12% | +51 |
| Australia | 61% | 28% | 12% | +49 |
| Canada | 56% | 28% | 16% | +40 |
| Belgium | 54% | 37% | 9% | +45 |
| India | 51% | 29% | 20% | +31 |
| France | 50% | 32% | 18% | +32 |
| Sweden | 48% | 28% | 24% | +24 |
| Argentina | 47% | 34% | 19% | +28 |
| Saudi Arabia | 46% | 32% | 21% | +25 |
| China | 46% | 37% | 17% | +29 |
| Germany | 45% | 35% | 21% | +24 |
| United States | 43% | 30% | 27% | +16 |
| Turkey | 43% | 26% | 31% | +12 |
| South Africa | 37% | 27% | 37% | 0 |
| Japan | 37% | 52% | 12% | +25 |
| South Korea | 36% | 47% | 17% | +19 |
| Italy | 36% | 41% | 23% | +13 |
| Chile | 34% | 26% | 40% | -6 |
| Mexico | 31% | 33% | 37% | -6 |
| Colombia | 26% | 26% | 49% | -23 |
| Serbia | 24% | 21% | 55% | -31 |
| Peru | 24% | 28% | 48% | -24 |
| Poland | 22% | 38% | 40% | -18 |
| Brazil | 20% | 23% | 57% | -37 |
| Russia | 13% | 25% | 62% | -49 |
| Hungary | 13% | 24% | 63% | -50 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

36

# Opinion on Healthcare System – Same Standard of Care for Everyone

QB4. To what extent do you agree or disagree with the following statement? – *The healthcare system in my country provides the same standard of care to everyone.*

| Country | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 32% | 28% | 40% | -8 |
| Malaysia | 57% | 27% | 16% | +41 |
| Great Britain | 54% | 23% | 23% | +31 |
| Spain | 52% | 27% | 20% | +32 |
| Canada | 50% | 29% | 21% | +29 |
| Australia | 47% | 28% | 25% | +22 |
| China | 43% | 32% | 25% | +18 |
| Saudi Arabia | 41% | 31% | 28% | +13 |
| India | 40% | 25% | 35% | +5 |
| Sweden | 40% | 30% | 30% | +10 |
| Turkey | 35% | 24% | 41% | -6 |
| Argentina | 34% | 30% | 36% | -2 |
| Belgium | 34% | 45% | 21% | +13 |
| South Korea | 33% | 44% | 22% | +11 |
| France | 30% | 30% | 40% | -10 |
| Italy | 28% | 35% | 38% | -10 |
| Japan | 26% | 50% | 24% | +2 |
| United States | 24% | 26% | 50% | -26 |
| Russia | 24% | 28% | 48% | -24 |
| Mexico | 24% | 28% | 48% | -24 |
| Germany | 23% | 27% | 50% | -27 |
| Serbia | 20% | 13% | 68% | -48 |
| Peru | 19% | 23% | 58% | -39 |
| Chile | 19% | 18% | 63% | -44 |
| Brazil | 18% | 17% | 66% | -48 |
| South Africa | 17% | 19% | 64% | -47 |
| Colombia | 17% | 19% | 64% | -47 |
| Poland | 17% | 25% | 59% | -42 |
| Hungary | 13% | 19% | 68% | -55 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

37

**Opinion on Healthcare System – Support for Compulsory Vaccinations**

QB4. To what extent do you agree or disagree with the statement. *Vaccinating against serious infectious diseases should be compulsory.*

| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 66% | 23% | 11% | +55 |
| Turkey | 81% | 13% | 7% | +74 |
| Colombia | 80% | 11% | 9% | +71 |
| Serbia | 80% | 11% | 10% | +70 |
| South Africa | 78% | 15% | 8% | +70 |
| Argentina | 77% | 13% | 10% | +67 |
| Malaysia | 76% | 17% | 7% | +69 |
| Peru | 75% | 13% | 12% | +63 |
| Spain | 74% | 20% | 6% | +68 |
| Mexico | 74% | 14% | 13% | +61 |
| India | 74% | 19% | 8% | +66 |
| Chile | 73% | 14% | 13% | +60 |
| South Korea | 71% | 22% | 7% | +64 |
| Australia | 70% | 21% | 8% | +62 |
| Brazil | 69% | 19% | 12% | +57 |
| Hungary | 66% | 24% | 10% | +56 |
| Great Britain | 65% | 25% | 10% | +55 |
| Saudi Arabia | 64% | 25% | 11% | +53 |
| Italy | 63% | 26% | 12% | +51 |
| Poland | 62% | 24% | 14% | +48 |
| Germany | 62% | 25% | 13% | +49 |
| China | 60% | 29% | 12% | +48 |
| Sweden | 60% | 29% | 11% | +49 |
| Russia | 59% | 26% | 16% | +43 |
| Canada | 58% | 27% | 15% | +43 |
| United States | 53% | 34% | 13% | +40 |
| Belgium | 53% | 36% | 11% | +42 |
| France | 51% | 35% | 15% | +36 |
| Japan | 41% | 49% | 10% | +31 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

38

# Opinion on Healthcare System – Agree Summary (% agree)

| QB4. To what extent do you agree with the following statements? (% agree) | WORLD | ARG | AUS | BEL | BRA | CAN | CHL | CHN | COL | FRA | GBR | DEU | HUN | IND | ITA | JPN | KOR | MEX | MYS | PER | POL | RUS | SAU | SER | ZAF | ESP | SWE | TUR | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Vaccinating against serious infectious diseases should be compulsory | 67% | 77% | 70% | 53% | 69% | 58% | 73% | 60% | 80% | 51% | 65% | 62% | 66% | 74% | 63% | 41% | 71% | 74% | 76% | 75% | 62% | 59% | 64% | 80% | 78% | 74% | 60% | 81% | 53% |
| Waiting times to get an appointment with doctors are too long in my country | 62% | 64% | 43% | 38% | 73% | 62% | 77% | 54% | 74% | 53% | 62% | 65% | 78% | 55% | 70% | 47% | 38% | 74% | 61% | 75% | 77% | 66% | 50% | 91% | 54% | 70% | 59% | 51% | 41% |
| Many people in my country cannot afford good healthcare | 59% | 70% | 46% | 32% | 74% | 27% | 81% | 63% | 78% | 60% | 30% | 40% | 77% | 72% | 54% | 44% | 28% | 75% | 51% | 77% | 73% | 75% | 56% | 82% | 83% | 52% | 25% | 57% | 75% |
| The healthcare system in my country is overstretched | 54% | 60% | 60% | 33% | 66% | 67% | 70% | 43% | 69% | 70% | 85% | 55% | 80% | 46% | 64% | 15% | 24% | 57% | 42% | 60% | 32% | 52% | 41% | 39% | 57% | 70% | 74% | 46% | 48% |
| I am concerned that my personal data will be made available to third parties (government, private companies) without my consent | 50% | 52% | 44% | 32% | 54% | 39% | 62% | 62% | 59% | 41% | 41% | 43% | 43% | 56% | 34% | 31% | 56% | 67% | 59% | 65% | 47% | 59% | 46% | 48% | 53% | 57% | 31% | 63% | 54% |
| In my country, information about how to look after my health is readily available when I need it | 50% | 47% | 68% | 49% | 25% | 65% | 46% | 51% | 35% | 48% | 73% | 62% | 35% | 50% | 31% | 39% | 56% | 43% | 64% | 32% | 41% | 49% | 48% | 42% | 49% | 59% | 61% | 64% | 66% |
| In my country, information about healthcare services is readily available when I need it | 47% | 46% | 67% | 50% | 22% | 62% | 40% | 53% | 27% | 45% | 69% | 57% | 33% | 50% | 28% | 37% | 54% | 37% | 63% | 25% | 34% | 44% | 44% | 36% | 47% | 58% | 58% | 66% | 61% |
| I find it easy to get an appointment with doctors in my local area | 41% | 41% | 63% | 45% | 24% | 43% | 37% | 35% | 31% | 36% | 40% | 32% | 23% | 61% | 27% | 27% | 55% | 37% | 53% | 26% | 30% | 35% | 48% | 35% | 52% | 64% | 34% | 59% | 58% |
| I trust the healthcare system in my country to provide me with the best treatment | 40% | 47% | 61% | 54% | 20% | 56% | 34% | 46% | 26% | 50% | 63% | 45% | 13% | 51% | 36% | 37% | 36% | 31% | 63% | 24% | 22% | 13% | 46% | 24% | 37% | 64% | 48% | 43% | 43% |
| The healthcare system in my country provides the same standard of care to everyone | 31% | 34% | 47% | 34% | 18% | 50% | 19% | 43% | 17% | 30% | 54% | 23% | 13% | 40% | 28% | 26% | 33% | 24% | 57% | 19% | 17% | 24% | 41% | 20% | 17% | 52% | 40% | 35% | 24% |

# Problems with Own Healthcare System – Globally

| Problem | Percentage |
|---|---|
| Access to treatment/long waiting times | 40% |
| Not enough staff | 36% |
| Cost of accessing treatment | 32% |
| Bureaucracy | 26% |
| Lack of investment in preventative health | 21% |
| Poor quality treatment | 20% |
| Ageing population | 20% |
| Lack of investment | 19% |
| Lack of choice | 8% |
| Low standards of cleanliness | 8% |
| Poor safety | 8% |
| Other | 3% |

■ [ISSUE] is a top three problem facing my country's healthcare system

**QB5. Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?**
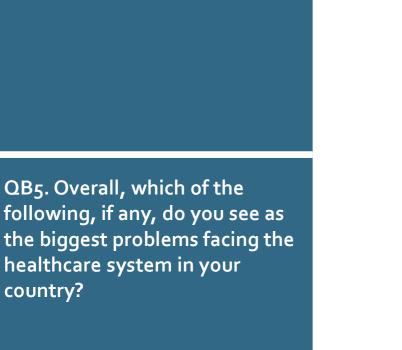
Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Problems with Own Healthcare System – Summary

**QB5. Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?**

| | WORLD | ARG | AUS | BEL | BRA | CAN | CHL | CHN | COL | FRA | GBR | DEU | HUN | IND | ITA | JPN | KOR | MEX | MYS | PER | POL | RUS | SAU | SER | ZAF | ESP | SWE | TUR | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Access to treatment/long waiting times | 41% | 35% | 37% | 26% | 35% | 49% | 64% | 26% | 59% | 29% | 32% | 37% | 65% | 22% | 59% | 20% | 26% | 48% | 43% | 46% | 70% | 35% | 21% | 68% | 41% | 52% | 52% | 38% | 22% |
| Not enough staff | 36% | 25% | 37% | 38% | 23% | 54% | 39% | 23% | 17% | 67% | 54% | 61% | 63% | 17% | 38% | 33% | 27% | 20% | 34% | 21% | 23% | 30% | 15% | 37% | 41% | 49% | 68% | 36% | 14% |
| Cost of accessing treatment | 32% | 35% | 38% | 27% | 18% | 10% | 46% | 32% | 37% | 34% | 8% | 19% | 18% | 44% | 28% | 44% | 32% | 26% | 49% | 29% | 34% | 56% | 32% | 36% | 39% | 15% | 11% | 32% | 64% |
| Bureaucracy | 26% | 39% | 19% | 20% | 26% | 21% | 36% | 24% | 40% | 20% | 26% | 32% | 19% | 17% | 33% | 7% | 21% | 46% | 17% | 38% | 32% | 40% | 17% | 25% | 14% | 23% | 28% | 23% | 33% |
| Lack of investment in preventative health | 21% | 38% | 18% | 14% | 38% | 17% | 20% | 25% | 35% | 11% | 19% | 18% | 22% | 21% | 20% | 12% | 18% | 29% | 13% | 38% | 21% | 8% | 16% | 21% | 21% | 31% | 9% | 17% | 16% |
| Poor quality treatment | 21% | 9% | 7% | 7% | 32% | 7% | 16% | 20% | 27% | 6% | 6% | 12% | 20% | 35% | 17% | 5% | 8% | 29% | 26% | 26% | 33% | 59% | 25% | 39% | 43% | 5% | 11% | 36% | 16% |
| Ageing population | 20% | 4% | 37% | 28% | 4% | 38% | 9% | 46% | 2% | 28% | 37% | 29% | 16% | 16% | 16% | 52% | 43% | 3% | 12% | 2% | 22% | 8% | 15% | 9% | 5% | 22% | 19% | 16% | 16% |
| Lack of investment | 19% | 49% | 13% | 13% | 47% | 10% | 18% | 11% | 32% | 17% | 42% | 15% | 12% | 15% | 23% | 6% | 8% | 30% | 10% | 36% | 7% | 14% | 12% | 17% | 13% | 41% | 7% | 14% | 5% |
| Low standards of cleanliness | 8% | 9% | 4% | 3% | 9% | 3% | 2% | 6% | 4% | 4% | 3% | 8% | 13% | 30% | 6% | 2% | 6% | 7% | 16% | 7% | 4% | 5% | 14% | 10% | 30% | 3% | 3% | 12% | 4% |
| Lack of choice | 8% | 7% | 6% | 6% | 6% | 5% | 8% | 13% | 9% | 4% | 3% | 6% | 7% | 12% | 5% | 6% | 11% | 10% | 10% | 7% | 9% | 7% | 17% | 7% | 5% | 5% | 5% | 9% | 14% |
| Poor safety | 8% | 12% | 4% | 7% | 11% | 2% | 4% | 17% | 7% | 8% | 2% | 5% | 4% | 22% | 6% | 9% | 10% | 10% | 12% | 12% | 4% | 7% | 14% | 2% | 10% | 3% | 5% | 10% | 4% |
| Other | 3% | 3% | 4% | 6% | 2% | 4% | 2% | 0% | 3% | 3% | 6% | 3% | 2% | 1% | 1% | 1% | 1% | 2% | 1% | 2% | 1% | 2% | 3% | 3% | 2% | 2% | 8% | 2% | 5% |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Patient Experience

Are patients satisfied with the way their healthcare system treats them?

## IPSOS GLOBAL ADVISOR

**GAME CHANGERS**

# Most Recent Patient Experience – Was Treated with Dignity and Respect

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *I was treated with dignity and respect throughout my treatment.*

Legend: ■ Agree  ■ Neither agree nor disagree  ■ Disagree  ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 60% | 28% | 12% | +48 |
| United States | 76% | 20% | 4% | +72 |
| Turkey | 73% | 13% | 14% | +59 |
| Canada | 73% | 20% | 7% | +66 |
| Great Britain | 73% | 22% | 5% | +68 |
| Spain | 72% | 22% | 6% | +66 |
| Australia | 72% | 22% | 6% | +66 |
| Malaysia | 69% | 23% | 8% | +61 |
| South Africa | 69% | 18% | 13% | +56 |
| Argentina | 68% | 21% | 11% | +57 |
| Chile | 66% | 21% | 13% | +53 |
| Germany | 65% | 27% | 8% | +57 |
| France | 64% | 29% | 8% | +56 |
| Colombia | 64% | 22% | 15% | +49 |
| India | 63% | 28% | 9% | +54 |
| Sweden | 63% | 27% | 10% | +53 |
| China | 61% | 30% | 9% | +52 |
| Mexico | 58% | 25% | 17% | +41 |
| Saudi Arabia | 56% | 31% | 13% | +43 |
| Belgium | 56% | 37% | 8% | +48 |
| Italy | 51% | 36% | 13% | +38 |
| Russia | 49% | 29% | 22% | +27 |
| Serbia | 49% | 23% | 29% | +20 |
| Poland | 48% | 28% | 24% | +24 |
| Peru | 48% | 31% | 21% | +27 |
| Brazil | 48% | 30% | 23% | +25 |
| Hungary | 40% | 36% | 24% | +16 |
| South Korea | 38% | 50% | 12% | +26 |
| Japan | 34% | 56% | 11% | +23 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

43

# Most Recent Patient Experience – Values, Preferences and Needs Were Respected

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *The healthcare professionals treating me showed respect for my values, preferences and expressed needs.*

| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 55% | 31% | 14% | +41 |
| United States | 70% | 25% | 5% | +65 |
| Malaysia | 70% | 21% | 9% | +61 |
| Turkey | 69% | 12% | 19% | +50 |
| Australia | 69% | 24% | 7% | +62 |
| Canada | 67% | 25% | 8% | +59 |
| Great Britain | 65% | 29% | 6% | +59 |
| Spain | 63% | 28% | 9% | +54 |
| South Africa | 62% | 22% | 16% | +46 |
| India | 61% | 28% | 11% | +50 |
| Chile | 59% | 26% | 15% | +44 |
| Colombia | 59% | 24% | 18% | +41 |
| Argentina | 59% | 28% | 13% | +46 |
| Sweden | 58% | 30% | 12% | +46 |
| Germany | 58% | 32% | 11% | +47 |
| China | 56% | 35% | 10% | +46 |
| France | 55% | 37% | 8% | +47 |
| Mexico | 54% | 30% | 17% | +37 |
| Saudi Arabia | 53% | 33% | 14% | +39 |
| Serbia | 51% | 24% | 25% | +26 |
| Belgium | 51% | 41% | 8% | +43 |
| Italy | 48% | 39% | 13% | +35 |
| Poland | 47% | 32% | 21% | +26 |
| Brazil | 46% | 31% | 24% | +22 |
| Peru | 45% | 31% | 24% | +21 |
| Russia | 41% | 33% | 27% | +14 |
| Hungary | 40% | 36% | 24% | +16 |
| South Korea | 40% | 46% | 14% | +26 |
| Japan | 31% | 58% | 11% | +20 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Most Recent Patient Experience – Safety Was a Priority



Legend: ■ Agree  ■ Neither agree nor disagree  ■ Disagree  ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 52% | 34% | 14% | +38 |
| Malaysia | 73% | 18% | 8% | +65 |
| China | 68% | 26% | 6% | +62 |
| India | 66% | 26% | 8% | +58 |
| Australia | 66% | 29% | 5% | +61 |
| United States | 66% | 28% | 6% | +60 |
| Canada | 65% | 29% | 6% | +59 |
| Turkey | 61% | 19% | 20% | +41 |
| Spain | 60% | 32% | 9% | +51 |
| South Africa | 58% | 25% | 17% | +41 |
| Great Britain | 57% | 37% | 6% | +51 |
| Argentina | 56% | 32% | 12% | +44 |
| Saudi Arabia | 55% | 31% | 13% | +42 |
| France | 54% | 38% | 8% | +46 |
| Germany | 53% | 39% | 9% | +44 |
| Chile | 51% | 32% | 17% | +34 |
| Mexico | 49% | 33% | 18% | +31 |
| Peru | 49% | 30% | 21% | +28 |
| Colombia | 48% | 30% | 22% | +26 |
| Belgium | 47% | 46% | 7% | +40 |
| Sweden | 47% | 41% | 13% | +34 |
| Serbia | 47% | 33% | 21% | +26 |
| South Korea | 46% | 44% | 10% | +36 |
| Italy | 46% | 42% | 13% | +33 |
| Hungary | 37% | 41% | 23% | +14 |
| Poland | 36% | 38% | 25% | +11 |
| Japan | 35% | 55% | 10% | +25 |
| Brazil | 33% | 37% | 30% | +3 |
| Russia | 32% | 41% | 27% | +5 |

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *My safety was a priority.*

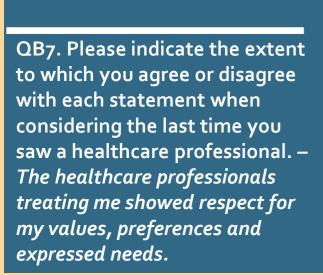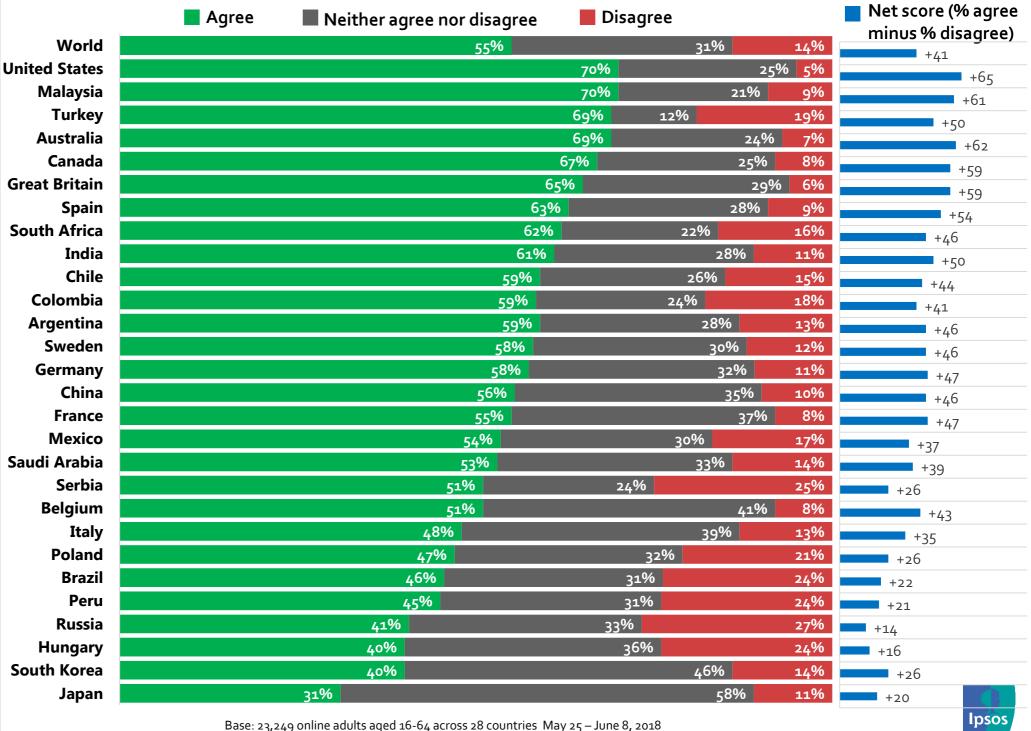Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

**Most Recent Patient Experience – Care Was Personalized**

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *My care was personalized to reflect my needs and choices.*
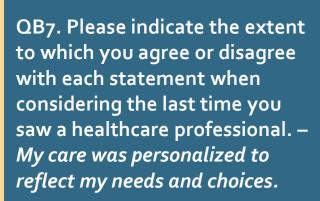
| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 49% | 34% | 18% | +31 |
| Malaysia | 64% | 28% | 7% | +57 |
| United States | 62% | 29% | 9% | +53 |
| Australia | 62% | 29% | 9% | +53 |
| India | 62% | 27% | 11% | +51 |
| Canada | 59% | 32% | 9% | +50 |
| Turkey | 58% | 19% | 23% | +35 |
| Spain | 58% | 32% | 10% | +48 |
| Germany | 57% | 31% | 12% | +45 |
| Argentina | 56% | 30% | 14% | +42 |
| South Africa | 55% | 26% | 19% | +36 |
| China | 53% | 36% | 11% | +42 |
| Mexico | 53% | 25% | 22% | +31 |
| Great Britain | 52% | 36% | 12% | +40 |
| Sweden | 50% | 34% | 17% | +33 |
| Saudi Arabia | 49% | 36% | 15% | +34 |
| Chile | 48% | 31% | 21% | +27 |
| France | 46% | 42% | 12% | +34 |
| Colombia | 43% | 28% | 29% | +14 |
| Belgium | 42% | 47% | 12% | +30 |
| Poland | 42% | 31% | 27% | +15 |
| South Korea | 40% | 45% | 15% | +25 |
| Peru | 40% | 32% | 28% | +12 |
| Italy | 39% | 45% | 16% | +23 |
| Russia | 35% | 31% | 34% | +1 |
| Serbia | 34% | 33% | 33% | +1 |
| Japan | 33% | 55% | 12% | +21 |
| Brazil | 30% | 35% | 35% | -5 |
| Hungary | 26% | 34% | 40% | -14 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

# Most Recent Patient Experience – Received Sufficient Information

**Agree** ■ **Neither agree nor disagree** ■ **Disagree** ■

**Net score (% agree minus % disagree)** ■

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 49% | 34% | 18% | +31 |
| Malaysia | 64% | 28% | 7% | +57 |
| United States | 62% | 29% | 9% | +53 |
| Australia | 62% | 29% | 9% | +53 |
| India | 62% | 27% | 11% | +51 |
| Canada | 59% | 32% | 9% | +50 |
| Turkey | 58% | 19% | 23% | +35 |
| Spain | 58% | 32% | 10% | +48 |
| Germany | 57% | 31% | 12% | +45 |
| Argentina | 56% | 30% | 14% | +42 |
| South Africa | 55% | 26% | 19% | +36 |
| China | 53% | 36% | 11% | +42 |
| Mexico | 53% | 25% | 22% | +31 |
| Great Britain | 52% | 36% | 12% | +40 |
| Sweden | 50% | 34% | 17% | +33 |
| Saudi Arabia | 49% | 36% | 15% | +34 |
| Chile | 48% | 31% | 21% | +27 |
| France | 46% | 42% | 12% | +34 |
| Colombia | 43% | 28% | 29% | +14 |
| Belgium | 42% | 47% | 12% | +30 |
| Poland | 42% | 31% | 27% | +15 |
| South Korea | 40% | 45% | 15% | +25 |
| Peru | 40% | 32% | 28% | +12 |
| Italy | 39% | 45% | 16% | +23 |
| Russia | 35% | 31% | 34% | +1 |
| Serbia | 34% | 33% | 33% | +1 |
| Japan | 33% | 55% | 12% | +21 |
| Brazil | 30% | 35% | 35% | -5 |
| Hungary | 26% | 34% | 40% | -14 |

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *I was provided with sufficient information on my treatment.*

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018
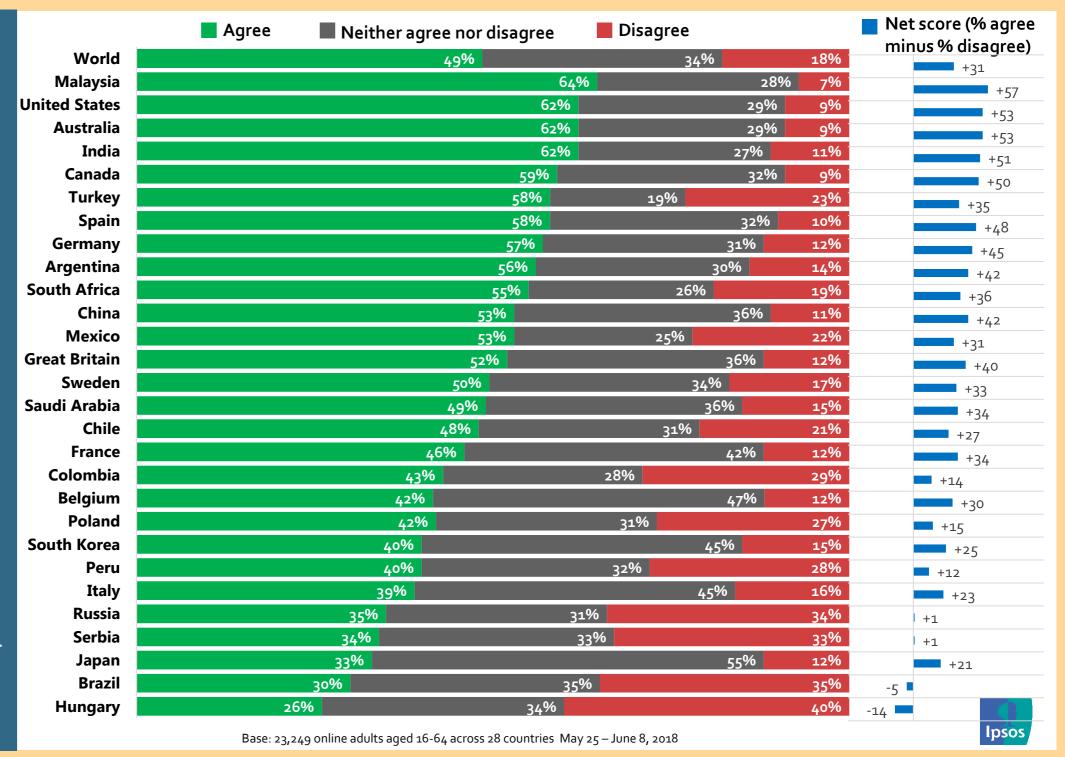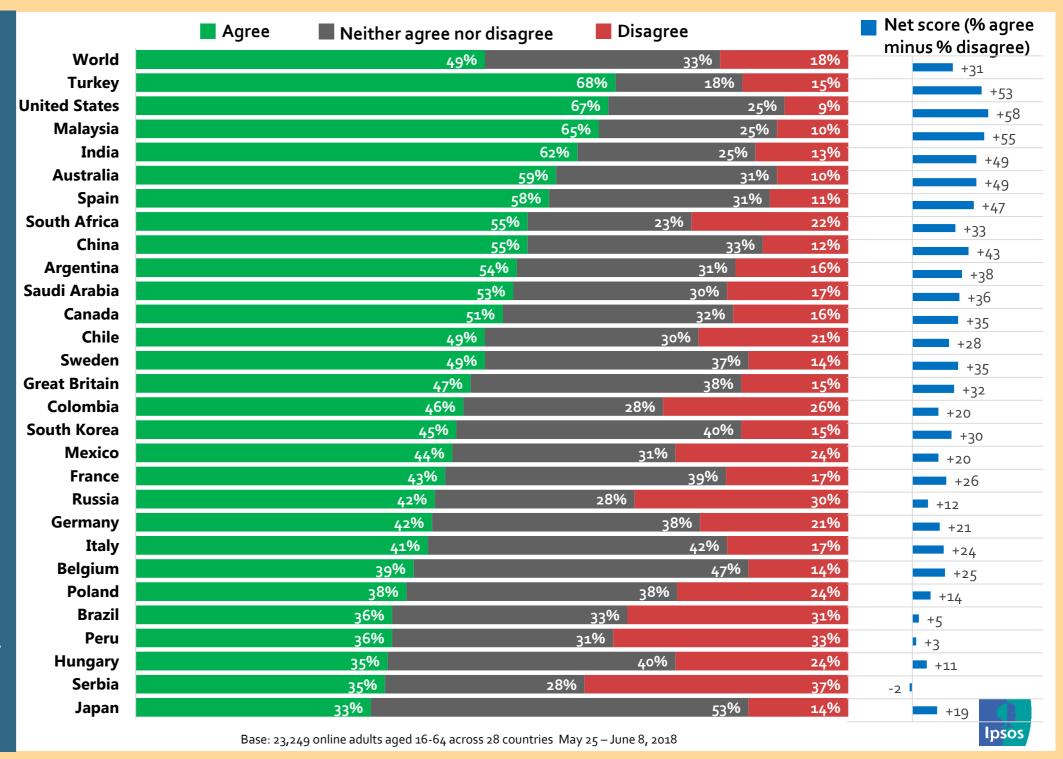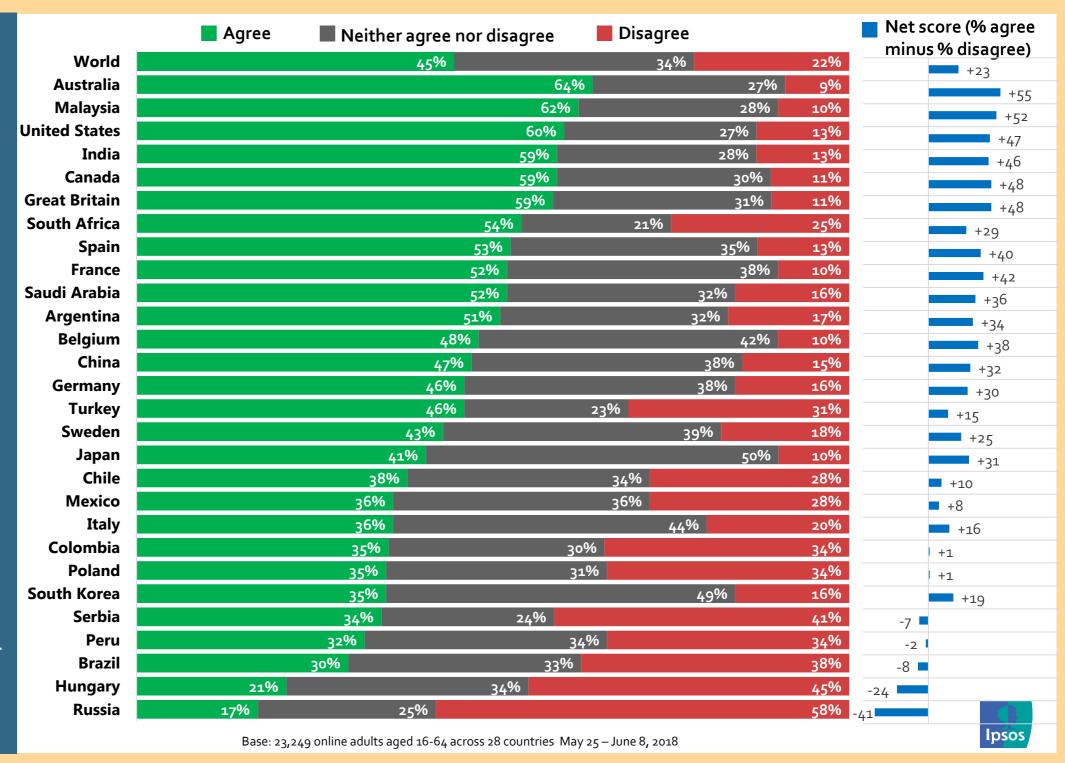
Ipsos

# Most Recent Patient Experience – Had Easy Access to Medical Information

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – I had easy access to my medical information.

Legend: ■ Agree  ■ Neither agree nor disagree  ■ Disagree  ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 49% | 33% | 18% | +31 |
| Turkey | 68% | 18% | 15% | +53 |
| United States | 67% | 25% | 9% | +58 |
| Malaysia | 65% | 25% | 10% | +55 |
| India | 62% | 25% | 13% | +49 |
| Australia | 59% | 31% | 10% | +49 |
| Spain | 58% | 31% | 11% | +47 |
| South Africa | 55% | 23% | 22% | +33 |
| China | 55% | 33% | 12% | +43 |
| Argentina | 54% | 31% | 16% | +38 |
| Saudi Arabia | 53% | 30% | 17% | +36 |
| Canada | 51% | 32% | 16% | +35 |
| Chile | 49% | 30% | 21% | +28 |
| Sweden | 49% | 37% | 14% | +35 |
| Great Britain | 47% | 38% | 15% | +32 |
| Colombia | 46% | 28% | 26% | +20 |
| South Korea | 45% | 40% | 15% | +30 |
| Mexico | 44% | 31% | 24% | +20 |
| France | 43% | 39% | 17% | +26 |
| Russia | 42% | 28% | 30% | +12 |
| Germany | 42% | 38% | 21% | +21 |
| Italy | 41% | 42% | 17% | +24 |
| Belgium | 39% | 47% | 14% | +25 |
| Poland | 38% | 38% | 24% | +14 |
| Brazil | 36% | 33% | 31% | +5 |
| Peru | 36% | 31% | 33% | +3 |
| Hungary | 35% | 40% | 24% | +11 |
| Serbia | 35% | 28% | 37% | -2 |
| Japan | 33% | 53% | 14% | +19 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018
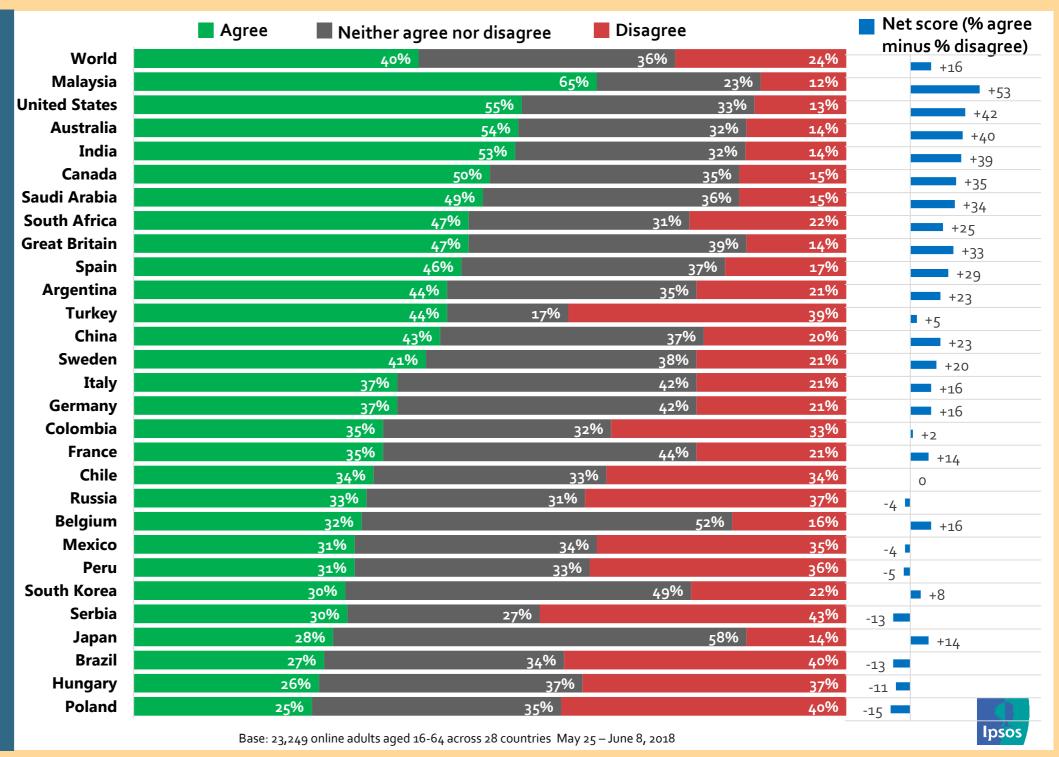
Ipsos

48

*Most Recent Patient Experience – Had Access to the Best Possible Care*

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *I had access to the best care I could have received.*

| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 45% | 34% | 22% | +23 |
| Australia | 64% | 27% | 9% | +55 |
| Malaysia | 62% | 28% | 10% | +52 |
| United States | 60% | 27% | 13% | +47 |
| India | 59% | 28% | 13% | +46 |
| Canada | 59% | 30% | 11% | +48 |
| Great Britain | 59% | 31% | 11% | +48 |
| South Africa | 54% | 21% | 25% | +29 |
| Spain | 53% | 35% | 13% | +40 |
| France | 52% | 38% | 10% | +42 |
| Saudi Arabia | 52% | 32% | 16% | +36 |
| Argentina | 51% | 32% | 17% | +34 |
| Belgium | 48% | 42% | 10% | +38 |
| China | 47% | 38% | 15% | +32 |
| Germany | 46% | 38% | 16% | +30 |
| Turkey | 46% | 23% | 31% | +15 |
| Sweden | 43% | 39% | 18% | +25 |
| Japan | 41% | 50% | 10% | +31 |
| Chile | 38% | 34% | 28% | +10 |
| Mexico | 36% | 36% | 28% | +8 |
| Italy | 36% | 44% | 20% | +16 |
| Colombia | 35% | 30% | 34% | +1 |
| Poland | 35% | 31% | 34% | +1 |
| South Korea | 35% | 49% | 16% | +19 |
| Serbia | 34% | 24% | 41% | -7 |
| Peru | 32% | 34% | 34% | -2 |
| Brazil | 30% | 33% | 38% | -8 |
| Hungary | 21% | 34% | 45% | -24 |
| Russia | 17% | 25% | 58% | -41 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018
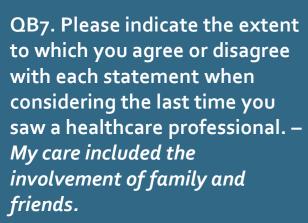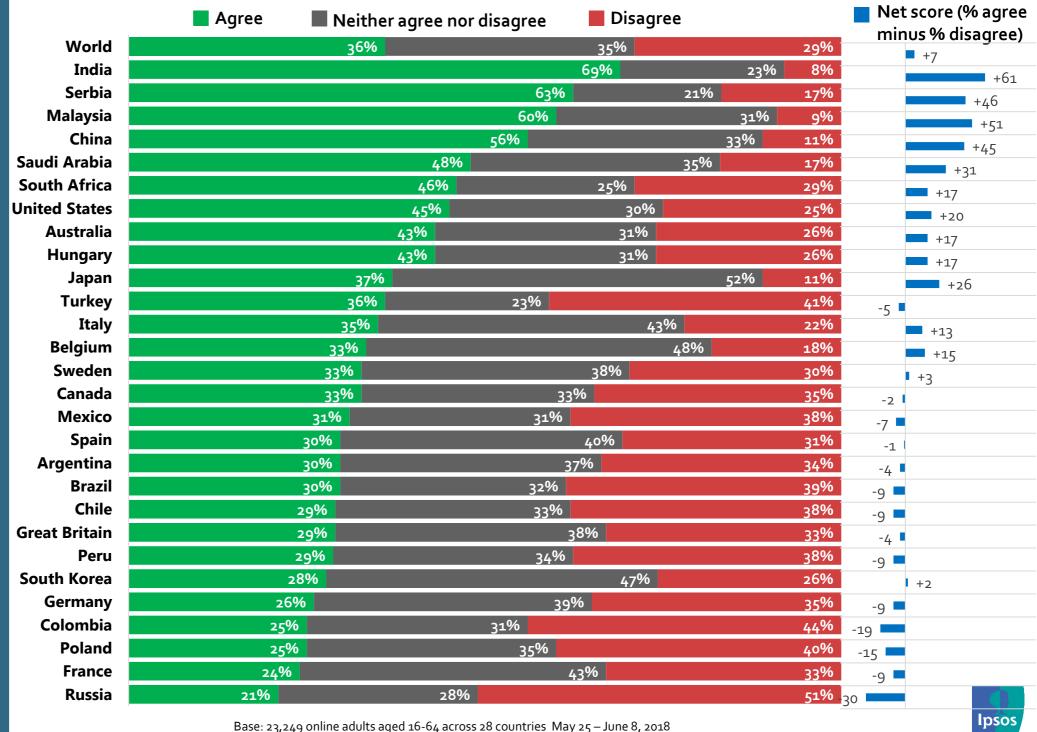
49

# Most Recent Patient Experience – Received Emotional Support

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *During my treatment the healthcare professional showed me emotional support.*

| Country | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 40% | 36% | 24% | +16 |
| Malaysia | 65% | 23% | 12% | +53 |
| United States | 55% | 33% | 13% | +42 |
| Australia | 54% | 32% | 14% | +40 |
| India | 53% | 32% | 14% | +39 |
| Canada | 50% | 35% | 15% | +35 |
| Saudi Arabia | 49% | 36% | 15% | +34 |
| South Africa | 47% | 31% | 22% | +25 |
| Great Britain | 47% | 39% | 14% | +33 |
| Spain | 46% | 37% | 17% | +29 |
| Argentina | 44% | 35% | 21% | +23 |
| Turkey | 44% | 17% | 39% | +5 |
| China | 43% | 37% | 20% | +23 |
| Sweden | 41% | 38% | 21% | +20 |
| Italy | 37% | 42% | 21% | +16 |
| Germany | 37% | 42% | 21% | +16 |
| Colombia | 35% | 32% | 33% | +2 |
| France | 35% | 44% | 21% | +14 |
| Chile | 34% | 33% | 34% | 0 |
| Russia | 33% | 31% | 37% | -4 |
| Belgium | 32% | 52% | 16% | +16 |
| Mexico | 31% | 34% | 35% | -4 |
| Peru | 31% | 33% | 36% | -5 |
| South Korea | 30% | 49% | 22% | +8 |
| Serbia | 30% | 27% | 43% | -13 |
| Japan | 28% | 58% | 14% | +14 |
| Brazil | 27% | 34% | 40% | -13 |
| Hungary | 26% | 37% | 37% | -11 |
| Poland | 25% | 35% | 40% | -15 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Most Recent Patient Experience – Care Involved Family and Friends

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional. – *My care included the involvement of family and friends.*

| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 36% | 35% | 29% | +7 |
| India | 69% | 23% | 8% | +61 |
| Serbia | 63% | 21% | 17% | +46 |
| Malaysia | 60% | 31% | 9% | +51 |
| China | 56% | 33% | 11% | +45 |
| Saudi Arabia | 48% | 35% | 17% | +31 |
| South Africa | 46% | 25% | 29% | +17 |
| United States | 45% | 30% | 25% | +20 |
| Australia | 43% | 31% | 26% | +17 |
| Hungary | 43% | 31% | 26% | +17 |
| Japan | 37% | 52% | 11% | +26 |
| Turkey | 36% | 23% | 41% | -5 |
| Italy | 35% | 43% | 22% | +13 |
| Belgium | 33% | 48% | 18% | +15 |
| Sweden | 33% | 38% | 30% | +3 |
| Canada | 33% | 33% | 35% | -2 |
| Mexico | 31% | 31% | 38% | -7 |
| Spain | 30% | 40% | 31% | -1 |
| Argentina | 30% | 37% | 34% | -4 |
| Brazil | 30% | 32% | 39% | -9 |
| Chile | 29% | 33% | 38% | -9 |
| Great Britain | 29% | 38% | 33% | -4 |
| Peru | 29% | 34% | 38% | -9 |
| South Korea | 28% | 47% | 26% | +2 |
| Germany | 26% | 39% | 35% | -9 |
| Colombia | 25% | 31% | 44% | -19 |
| Poland | 25% | 35% | 40% | -15 |
| France | 24% | 43% | 33% | -9 |
| Russia | 21% | 28% | 51% | 30 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Most Recent Patient Experience – Agree Summary (% agree)

**QB7. Please indicate the extent to which you agree with each one (% agree)**

| | WORLD | ARG | AUS | BEL | BRA | CAN | CHI | CHL | COL | FRA | GBR | DEU | HUN | IND | ITA | JPN | KOR | MEX | MYS | PER | POL | RUS | SAU | SER | ZAF | ESP | SWE | TUR | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| I was treated with dignity and respect throughout my treatment | 60% | 68% | 72% | 56% | 48% | 73% | 61% | 66% | 64% | 64% | 73% | 65% | 40% | 63% | 51% | 34% | 38% | 58% | 69% | 48% | 48% | 49% | 56% | 49% | 69% | 72% | 63% | 73% | 76% |
| The healthcare professionals treating me showed respect for my values, preferences and expressed needs | 55% | 59% | 69% | 51% | 46% | 67% | 56% | 59% | 59% | 55% | 65% | 58% | 40% | 61% | 48% | 31% | 40% | 54% | 70% | 45% | 47% | 41% | 53% | 51% | 62% | 63% | 58% | 69% | 70% |
| I was provided with sufficient information on my treatment | 55% | 58% | 69% | 51% | 38% | 65% | 53% | 55% | 51% | 55% | 66% | 59% | 41% | 62% | 50% | 42% | 43% | 46% | 70% | 42% | 46% | 43% | 54% | 47% | 62% | 62% | 56% | 66% | 71% |
| My safety was a priority | 52% | 56% | 66% | 47% | 33% | 65% | 68% | 51% | 48% | 54% | 57% | 53% | 37% | 66% | 46% | 35% | 46% | 49% | 73% | 49% | 36% | 32% | 55% | 47% | 58% | 60% | 47% | 61% | 66% |
| My care was personalized to reflect my needs and choices | 49% | 56% | 62% | 42% | 30% | 59% | 53% | 48% | 43% | 46% | 52% | 57% | 26% | 62% | 39% | 33% | 40% | 53% | 64% | 40% | 42% | 35% | 49% | 34% | 55% | 58% | 50% | 58% | 62% |
| I had easy access to my medical information | 49% | 54% | 59% | 39% | 36% | 51% | 55% | 49% | 46% | 43% | 47% | 42% | 35% | 62% | 41% | 33% | 45% | 44% | 65% | 36% | 38% | 42% | 53% | 35% | 55% | 58% | 49% | 68% | 67% |
| I had access to the best care I could have received | 45% | 51% | 64% | 48% | 30% | 59% | 47% | 38% | 35% | 52% | 59% | 46% | 21% | 59% | 36% | 41% | 35% | 36% | 62% | 32% | 35% | 17% | 52% | 34% | 54% | 53% | 43% | 46% | 60% |
| During my treatment the healthcare professional showed me emotional support | 40% | 44% | 54% | 32% | 27% | 50% | 43% | 34% | 35% | 35% | 47% | 37% | 26% | 53% | 37% | 28% | 30% | 31% | 65% | 31% | 25% | 33% | 49% | 30% | 47% | 46% | 41% | 44% | 55% |
| My care included the involvement of family and friends | 36% | 30% | 43% | 33% | 30% | 33% | 56% | 29% | 25% | 24% | 29% | 26% | 43% | 69% | 35% | 37% | 28% | 31% | 60% | 29% | 25% | 21% | 48% | 63% | 46% | 30% | 33% | 36% | 45% |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

# Most Recent Experience with Provider – Was Taken Seriously

**Agree** | **Neither agree nor disagree** | **Disagree**

**Net score (% agree minus % disagree)**

| Country | Agree | Neither | Disagree | Net score |
|---|---|---|---|---|
| World | 56% | 29% | 14% | +42 |
| Australia | 71% | 21% | 8% | +63 |
| United States | 71% | 21% | 8% | +63 |
| France | 69% | 24% | 7% | +62 |
| Canada | 68% | 22% | 10% | +58 |
| South Africa | 67% | 20% | 14% | +53 |
| Germany | 66% | 25% | 9% | +57 |
| Great Britain | 64% | 26% | 10% | +54 |
| Malaysia | 64% | 28% | 8% | +56 |
| Spain | 63% | 28% | 9% | +54 |
| Turkey | 63% | 19% | 19% | +44 |
| Argentina | 62% | 27% | 11% | +51 |
| India | 61% | 28% | 11% | +50 |
| Saudi Arabia | 57% | 30% | 13% | +44 |
| Belgium | 57% | 36% | 7% | +50 |
| China | 56% | 32% | 12% | +44 |
| Chile | 55% | 28% | 17% | +38 |
| Serbia | 55% | 22% | 23% | +32 |
| Sweden | 55% | 32% | 13% | +42 |
| Mexico | 54% | 27% | 18% | +36 |
| Poland | 54% | 29% | 17% | +37 |
| Italy | 52% | 35% | 13% | +39 |
| Colombia | 50% | 30% | 19% | +31 |
| Hungary | 46% | 32% | 22% | +24 |
| Brazil | 44% | 32% | 24% | +20 |
| Russia | 43% | 35% | 23% | +20 |
| South Korea | 41% | 44% | 15% | +26 |
| Peru | 40% | 35% | 25% | +15 |
| Japan | 34% | 52% | 15% | +19 |

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. – *This doctor takes me seriously.*

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018
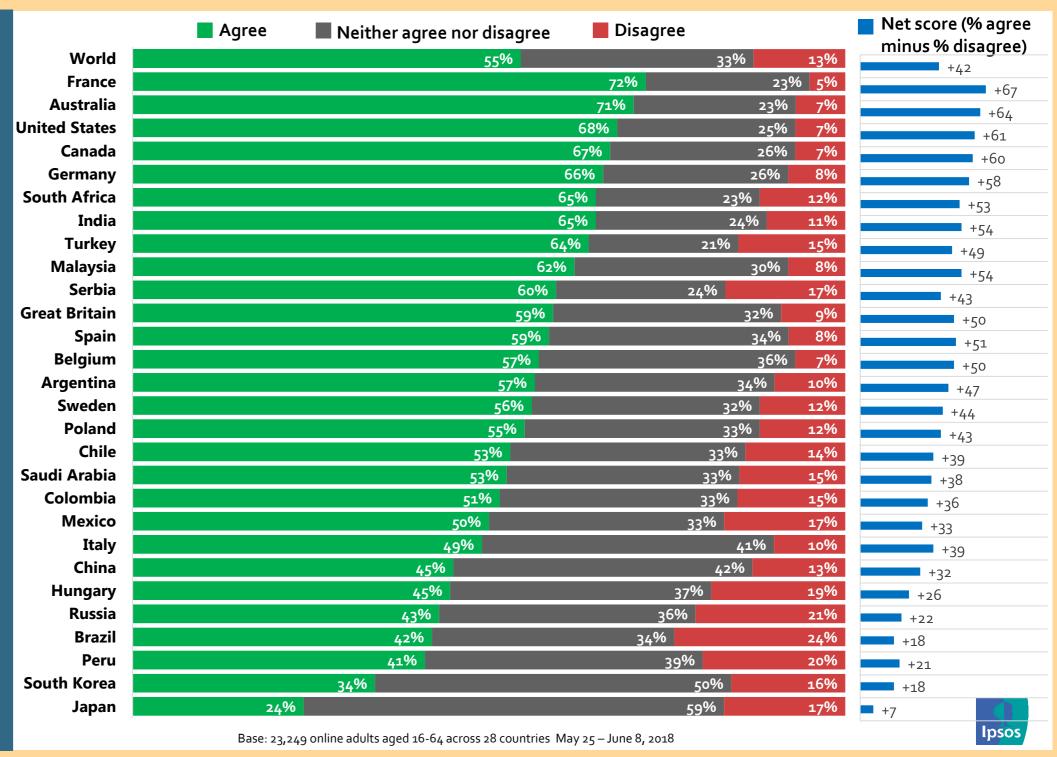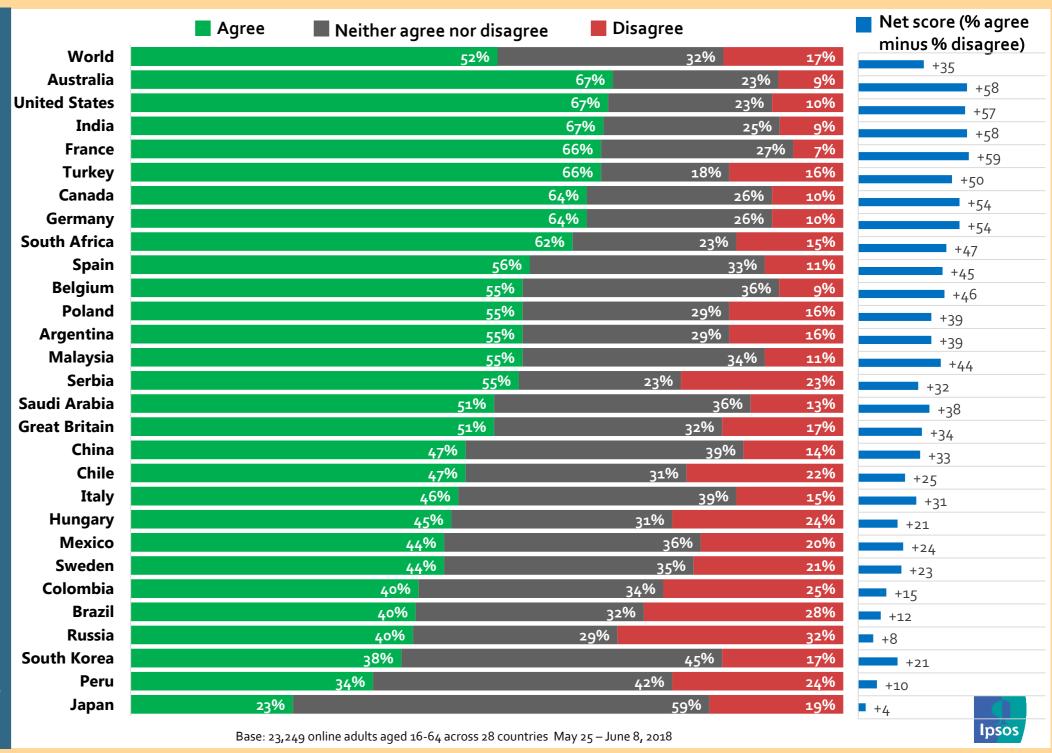
Ipsos

# Most Recent Experience with Provider – Was Accepted As I Am

**QB8.** Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. – *This doctor accepts me the way I am.*

Legend: ■ Agree   ■ Neither agree nor disagree   ■ Disagree   ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 55% | 33% | 13% | +42 |
| France | 72% | 23% | 5% | +67 |
| Australia | 71% | 23% | 7% | +64 |
| United States | 68% | 25% | 7% | +61 |
| Canada | 67% | 26% | 7% | +60 |
| Germany | 66% | 26% | 8% | +58 |
| South Africa | 65% | 23% | 12% | +53 |
| India | 65% | 24% | 11% | +54 |
| Turkey | 64% | 21% | 15% | +49 |
| Malaysia | 62% | 30% | 8% | +54 |
| Serbia | 60% | 24% | 17% | +43 |
| Great Britain | 59% | 32% | 9% | +50 |
| Spain | 59% | 34% | 8% | +51 |
| Belgium | 57% | 36% | 7% | +50 |
| Argentina | 57% | 34% | 10% | +47 |
| Sweden | 56% | 32% | 12% | +44 |
| Poland | 55% | 33% | 12% | +43 |
| Chile | 53% | 33% | 14% | +39 |
| Saudi Arabia | 53% | 33% | 15% | +38 |
| Colombia | 51% | 33% | 15% | +36 |
| Mexico | 50% | 33% | 17% | +33 |
| Italy | 49% | 41% | 10% | +39 |
| China | 45% | 42% | 13% | +32 |
| Hungary | 45% | 37% | 19% | +26 |
| Russia | 43% | 36% | 21% | +22 |
| Brazil | 42% | 34% | 24% | +18 |
| Peru | 41% | 39% | 20% | +21 |
| South Korea | 34% | 50% | 16% | +18 |
| Japan | 24% | 59% | 17% | +7 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018
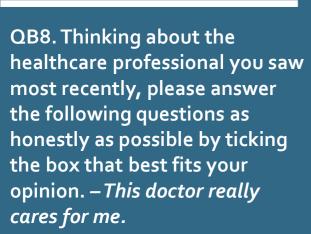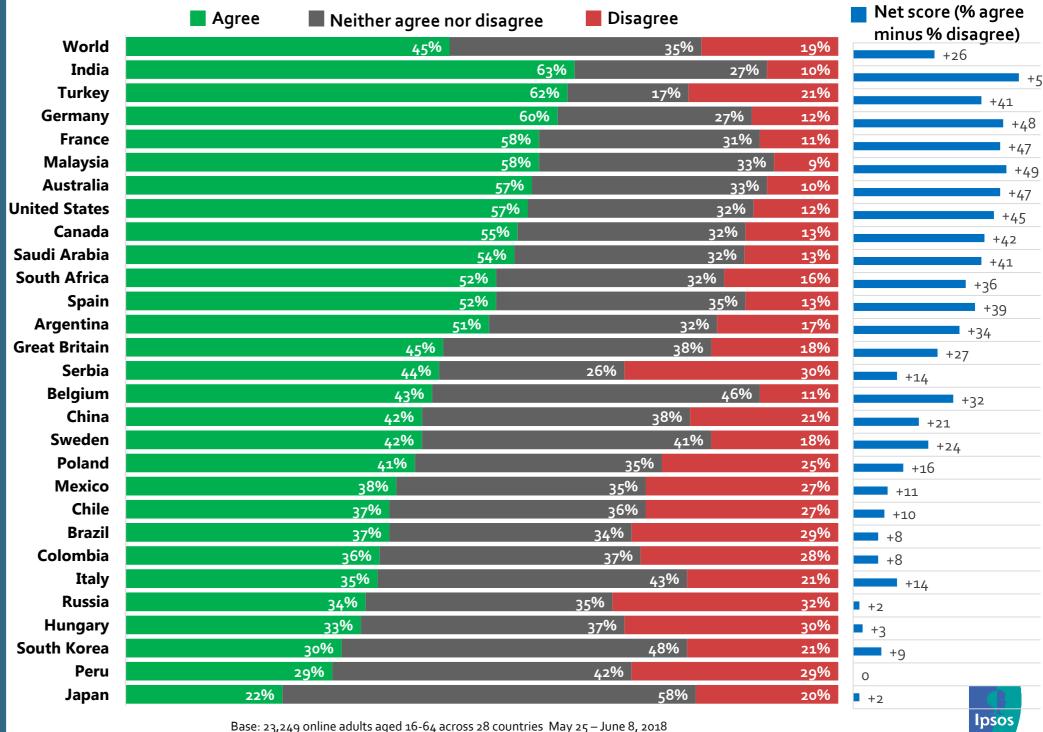
Ipsos

54

# Most Recent Experience with Provider – Know What to Expect with Provider

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. – *I know what to expect with this doctor*.

**Legend:** ■ Agree ■ Neither agree nor disagree ■ Disagree ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 52% | 32% | 17% | +35 |
| Australia | 67% | 23% | 9% | +58 |
| United States | 67% | 23% | 10% | +57 |
| India | 67% | 25% | 9% | +58 |
| France | 66% | 27% | 7% | +59 |
| Turkey | 66% | 18% | 16% | +50 |
| Canada | 64% | 26% | 10% | +54 |
| Germany | 64% | 26% | 10% | +54 |
| South Africa | 62% | 23% | 15% | +47 |
| Spain | 56% | 33% | 11% | +45 |
| Belgium | 55% | 36% | 9% | +46 |
| Poland | 55% | 29% | 16% | +39 |
| Argentina | 55% | 29% | 16% | +39 |
| Malaysia | 55% | 34% | 11% | +44 |
| Serbia | 55% | 23% | 23% | +32 |
| Saudi Arabia | 51% | 36% | 13% | +38 |
| Great Britain | 51% | 32% | 17% | +34 |
| China | 47% | 39% | 14% | +33 |
| Chile | 47% | 31% | 22% | +25 |
| Italy | 46% | 39% | 15% | +31 |
| Hungary | 45% | 31% | 24% | +21 |
| Mexico | 44% | 36% | 20% | +24 |
| Sweden | 44% | 35% | 21% | +23 |
| Colombia | 40% | 34% | 25% | +15 |
| Brazil | 40% | 32% | 28% | +12 |
| Russia | 40% | 29% | 32% | +8 |
| South Korea | 38% | 45% | 17% | +21 |
| Peru | 34% | 42% | 24% | +10 |
| Japan | 23% | 59% | 19% | +4 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

55

# Most Recent Experience with Provider – Doctor Really Cares for Me

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. –*This doctor really cares for me.*

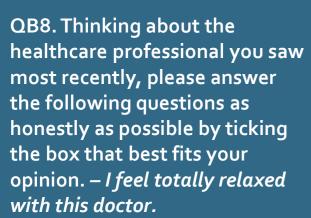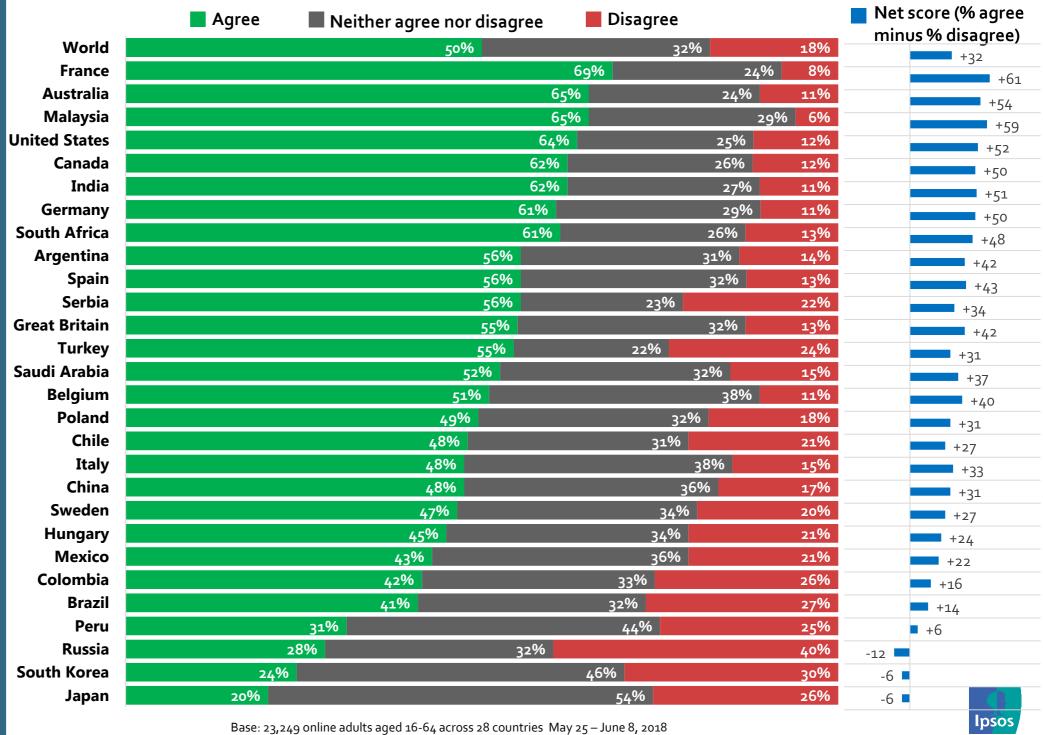Legend: ■ Agree  ■ Neither agree nor disagree  ■ Disagree  ■ Net score (% agree minus % disagree)

| Country | Agree | Neither agree nor disagree | Disagree | Net score |
|---|---|---|---|---|
| World | 45% | 35% | 19% | +26 |
| India | 63% | 27% | 10% | +53 |
| Turkey | 62% | 17% | 21% | +41 |
| Germany | 60% | 27% | 12% | +48 |
| France | 58% | 31% | 11% | +47 |
| Malaysia | 58% | 33% | 9% | +49 |
| Australia | 57% | 33% | 10% | +47 |
| United States | 57% | 32% | 12% | +45 |
| Canada | 55% | 32% | 13% | +42 |
| Saudi Arabia | 54% | 32% | 13% | +41 |
| South Africa | 52% | 32% | 16% | +36 |
| Spain | 52% | 35% | 13% | +39 |
| Argentina | 51% | 32% | 17% | +34 |
| Great Britain | 45% | 38% | 18% | +27 |
| Serbia | 44% | 26% | 30% | +14 |
| Belgium | 43% | 46% | 11% | +32 |
| China | 42% | 38% | 21% | +21 |
| Sweden | 42% | 41% | 18% | +24 |
| Poland | 41% | 35% | 25% | +16 |
| Mexico | 38% | 35% | 27% | +11 |
| Chile | 37% | 36% | 27% | +10 |
| Brazil | 37% | 34% | 29% | +8 |
| Colombia | 36% | 37% | 28% | +8 |
| Italy | 35% | 43% | 21% | +14 |
| Russia | 34% | 35% | 32% | +2 |
| Hungary | 33% | 37% | 30% | +3 |
| South Korea | 30% | 48% | 21% | +9 |
| Peru | 29% | 42% | 29% | 0 |
| Japan | 22% | 58% | 20% | +2 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Most Recent Experience with Provider – Feel Relaxed with Doctor

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. – *I feel totally relaxed with this doctor.*

| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 50% | 32% | 18% | +32 |
| France | 69% | 24% | 8% | +61 |
| Australia | 65% | 24% | 11% | +54 |
| Malaysia | 65% | 29% | 6% | +59 |
| United States | 64% | 25% | 12% | +52 |
| Canada | 62% | 26% | 12% | +50 |
| India | 62% | 27% | 11% | +51 |
| Germany | 61% | 29% | 11% | +50 |
| South Africa | 61% | 26% | 13% | +48 |
| Argentina | 56% | 31% | 14% | +42 |
| Spain | 56% | 32% | 13% | +43 |
| Serbia | 56% | 23% | 22% | +34 |
| Great Britain | 55% | 32% | 13% | +42 |
| Turkey | 55% | 22% | 24% | +31 |
| Saudi Arabia | 52% | 32% | 15% | +37 |
| Belgium | 51% | 38% | 11% | +40 |
| Poland | 49% | 32% | 18% | +31 |
| Chile | 48% | 31% | 21% | +27 |
| Italy | 48% | 38% | 15% | +33 |
| China | 48% | 36% | 17% | +31 |
| Sweden | 47% | 34% | 20% | +27 |
| Hungary | 45% | 34% | 21% | +24 |
| Mexico | 43% | 36% | 21% | +22 |
| Colombia | 42% | 33% | 26% | +16 |
| Brazil | 41% | 32% | 27% | +14 |
| Peru | 31% | 44% | 25% | +6 |
| Russia | 28% | 32% | 40% | -12 |
| South Korea | 24% | 46% | 30% | -6 |
| Japan | 20% | 54% | 26% | -6 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

57

# Most Recent Experience with Provider – Doctor Knows How I Feel

**Agree** | **Neither agree nor disagree** | **Disagree** | **Net score (% agree minus % disagree)**

| Country | Agree | Neither | Disagree | Net score |
|---|---|---|---|---|
| World | 42% | 35% | 24% | +18 |
| India | 60% | 29% | 11% | +49 |
| Turkey | 59% | 17% | 24% | +35 |
| Germany | 53% | 30% | 17% | +36 |
| Australia | 52% | 32% | 16% | +36 |
| Malaysia | 52% | 35% | 13% | +39 |
| United States | 52% | 31% | 18% | +34 |
| France | 51% | 34% | 15% | +36 |
| Canada | 50% | 33% | 17% | +33 |
| Argentina | 48% | 33% | 20% | +28 |
| Saudi Arabia | 48% | 37% | 16% | +32 |
| Spain | 46% | 34% | 20% | +26 |
| South Africa | 46% | 28% | 26% | +20 |
| Belgium | 45% | 41% | 14% | +31 |
| China | 43% | 37% | 21% | +22 |
| Mexico | 40% | 33% | 28% | +12 |
| Chile | 39% | 35% | 26% | +13 |
| Italy | 38% | 41% | 21% | +17 |
| Serbia | 37% | 24% | 39% | -2 |
| Great Britain | 36% | 38% | 26% | +10 |
| Brazil | 35% | 32% | 33% | +2 |
| Colombia | 34% | 34% | 32% | +2 |
| South Korea | 32% | 46% | 22% | +10 |
| Hungary | 31% | 37% | 32% | -1 |
| Poland | 30% | 36% | 35% | -5 |
| Peru | 30% | 42% | 28% | +2 |
| Sweden | 28% | 34% | 37% | -9 |
| Russia | 27% | 34% | 39% | -12 |
| Japan | 23% | 55% | 21% | +2 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. – *This doctor really knows how I feel about things.*

Ipsos

58

**Most Recent Experience with Provider – Know Doctor Very Well**

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. – *I know this doctor very well.*

| | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 37% | 33% | 30% | +7 |
| India | 60% | 27% | 13% | +47 |
| France | 56% | 29% | 16% | +40 |
| United States | 48% | 29% | 23% | +25 |
| Australia | 48% | 28% | 23% | +25 |
| Germany | 48% | 35% | 17% | +31 |
| Serbia | 47% | 24% | 29% | +18 |
| Canada | 47% | 30% | 23% | +24 |
| South Africa | 45% | 25% | 30% | +15 |
| Saudi Arabia | 45% | 32% | 24% | +21 |
| Belgium | 44% | 42% | 14% | +30 |
| Turkey | 43% | 20% | 37% | +6 |
| Argentina | 42% | 33% | 25% | +17 |
| Spain | 42% | 35% | 24% | +18 |
| Malaysia | 39% | 44% | 17% | +22 |
| Hungary | 37% | 32% | 32% | +5 |
| Italy | 34% | 41% | 25% | +9 |
| China | 32% | 37% | 31% | +1 |
| Poland | 32% | 36% | 32% | 0 |
| Chile | 32% | 32% | 37% | -5 |
| Mexico | 31% | 36% | 33% | -2 |
| Brazil | 30% | 30% | 40% | -10 |
| Great Britain | 28% | 31% | 42% | -14 |
| Colombia | 22% | 32% | 45% | -23 |
| Peru | 22% | 37% | 41% | -19 |
| Russia | 21% | 28% | 51% | -30 |
| South Korea | 20% | 43% | 37% | -17 |
| Sweden | 20% | 31% | 50% | -30 |
| Japan | 14% | 53% | 33% | -19 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

# Most Recent Experience with Provider – Doctor Knows Me Very Well

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion. – *This doctor knows me as a person.*

| Country | Agree | Neither agree nor disagree | Disagree | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 36% | 31% | 33% | +3 |
| India | 62% | 25% | 14% | +48 |
| France | 54% | 29% | 17% | +37 |
| Australia | 50% | 29% | 21% | +29 |
| Canada | 49% | 29% | 22% | +27 |
| Germany | 49% | 29% | 22% | +27 |
| Malaysia | 48% | 37% | 15% | +33 |
| United States | 47% | 29% | 24% | +23 |
| Belgium | 45% | 40% | 15% | +30 |
| South Africa | 42% | 26% | 32% | +10 |
| Turkey | 40% | 18% | 43% | -3 |
| Spain | 40% | 33% | 28% | +12 |
| Saudi Arabia | 39% | 30% | 31% | +8 |
| Argentina | 37% | 34% | 29% | +8 |
| Serbia | 36% | 21% | 43% | -7 |
| Hungary | 36% | 27% | 38% | -2 |
| Italy | 36% | 38% | 27% | +9 |
| Mexico | 31% | 36% | 33% | -2 |
| Great Britain | 29% | 30% | 41% | -12 |
| Poland | 28% | 25% | 47% | -19 |
| Brazil | 28% | 32% | 41% | -13 |
| Chile | 28% | 32% | 41% | -13 |
| China | 26% | 35% | 39% | -13 |
| Colombia | 23% | 31% | 46% | -23 |
| South Korea | 22% | 41% | 37% | -15 |
| Peru | 21% | 36% | 43% | -22 |
| Sweden | 19% | 31% | 50% | -31 |
| Russia | 19% | 29% | 52% | -33 |
| Japan | 13% | 49% | 38% | -25 |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

60

# Most Recent Experience with Provider – Agree Summary (% agree)

**QB8. To what extent do you agree with the following statements? (% agree)**

| | WORLD | ARG | AUS | BEL | BRA | CAN | CHL | CHN | COL | FRA | GBR | DEU | HUN | IND | ITA | JPN | KOR | MEX | MYS | PER | POL | RUS | SAU | SRB | ZAF | ESP | SWE | TUR | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| This doctor takes me seriously | 56% | 62% | 71% | 57% | 44% | 68% | 55% | 56% | 50% | 69% | 64% | 66% | 46% | 61% | 52% | 34% | 41% | 54% | 64% | 40% | 54% | 43% | 57% | 55% | 67% | 63% | 55% | 63% | 71% |
| This doctor accepts me the way I am | 55% | 57% | 71% | 57% | 42% | 67% | 53% | 45% | 51% | 72% | 59% | 66% | 45% | 65% | 49% | 24% | 34% | 50% | 62% | 41% | 55% | 43% | 53% | 60% | 65% | 59% | 56% | 64% | 68% |
| I know what to expect with this doctor | 52% | 55% | 67% | 55% | 40% | 64% | 47% | 47% | 40% | 66% | 51% | 64% | 45% | 67% | 46% | 23% | 38% | 44% | 55% | 34% | 55% | 40% | 51% | 55% | 62% | 56% | 44% | 66% | 67% |
| I feel totally relaxed with this doctor | 50% | 56% | 65% | 51% | 41% | 62% | 48% | 48% | 42% | 69% | 55% | 61% | 45% | 62% | 48% | 20% | 24% | 43% | 65% | 31% | 49% | 28% | 52% | 56% | 61% | 56% | 47% | 55% | 64% |
| This doctor really cares for me | 45% | 51% | 57% | 43% | 37% | 55% | 37% | 42% | 36% | 58% | 45% | 60% | 33% | 63% | 35% | 22% | 30% | 38% | 58% | 29% | 41% | 34% | 54% | 44% | 52% | 52% | 42% | 62% | 57% |
| This doctor really knows how I feel about things | 42% | 48% | 52% | 45% | 35% | 50% | 39% | 43% | 34% | 51% | 36% | 53% | 31% | 60% | 38% | 23% | 32% | 40% | 52% | 30% | 30% | 27% | 48% | 37% | 46% | 46% | 28% | 59% | 52% |
| I know this doctor very well | 37% | 42% | 48% | 44% | 30% | 47% | 32% | 32% | 22% | 56% | 28% | 48% | 37% | 60% | 34% | 14% | 20% | 31% | 39% | 22% | 32% | 21% | 45% | 47% | 45% | 42% | 20% | 43% | 48% |
| This doctor knows me as a person | 36% | 37% | 50% | 45% | 28% | 49% | 28% | 26% | 23% | 54% | 29% | 49% | 36% | 62% | 36% | 13% | 22% | 31% | 48% | 21% | 28% | 19% | 39% | 36% | 42% | 40% | 19% | 40% | 47% |

Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018

Ipsos

## Most Recent Experience as Patient/with a Provider – Average of 16 Attributes (% Agree)

| Country | % |
|---|---|
| World | 48% |
| India | 62% |
| United States | 62% |
| Malaysia | 61% |
| Australia | 61% |
| Canada | 58% |
| Turkey | 57% |
| South Africa | 56% |
| France | 54% |
| Spain | 54% |
| Germany | 54% |
| Saudi Arabia | 51% |
| Great Britain | 51% |
| Chile | 49% |
| Belgium | 47% |
| Serbia | 46% |
| China | 45% |
| Sweden | 44% |
| Mexico | 43% |
| Italy | 42% |
| Colombia | 41% |
| Poland | 40% |
| Hungary | 37% |
| Brazil | 36% |
| Peru | 35% |
| South Korea | 34% |
| Russia | 33% |
| Japan | 29% |

QB7. Please indicate the extent to which you agree or disagree with each statement when considering the last time you saw a healthcare professional.

QB8. Thinking about the healthcare professional you saw most recently, please answer the following questions as honestly as possible by ticking the box that best fits your opinion.

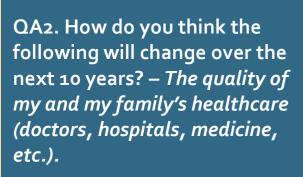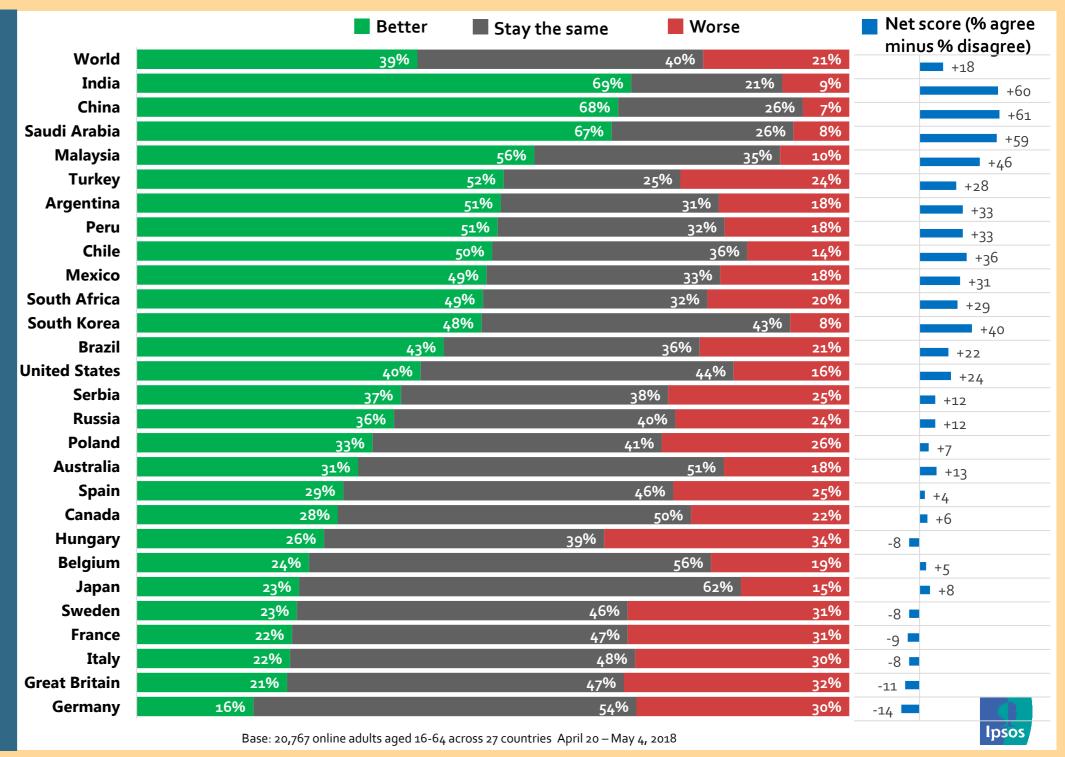Base: 23,249 online adults aged 16-64 across 28 countries  May 25 – June 8, 2018
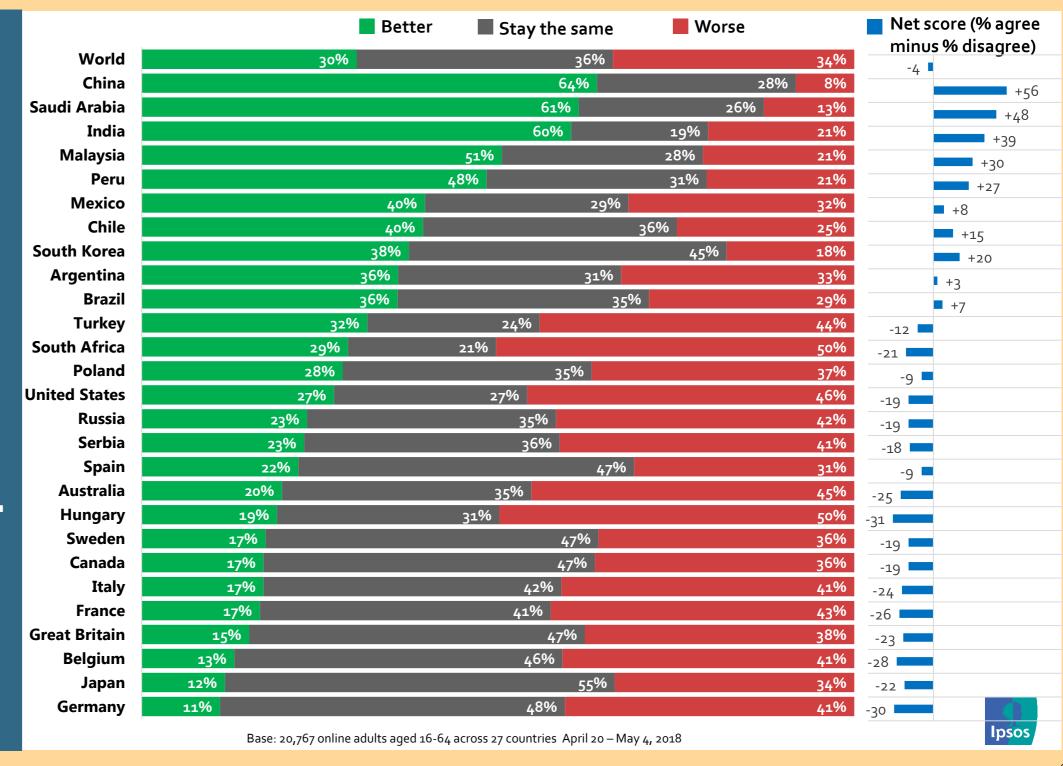
Ipsos

# Expected Changes in Healthcare

How do citizens expect the future of healthcare to look?

## IPSOS GLOBAL ADVISOR

**GAME CHANGERS**   Ipsos

**Expected 10-Year Change – Own Health**

QA2. How do you think the following will change over the next 10 years? – *My own health.*

| Country | Better | Stay the same | Worse | Net score (% agree minus % disagree) |
|---|---|---|---|---|
| World | 35% | 40% | 25% | +10 |
| India | 66% | 22% | 13% | +53 |
| Saudi Arabia | 63% | 29% | 8% | +55 |
| China | 57% | 28% | 15% | +42 |
| Peru | 56% | 30% | 14% | +42 |
| Mexico | 56% | 31% | 13% | +43 |
| Malaysia | 53% | 34% | 14% | +39 |
| Brazil | 52% | 33% | 15% | +37 |
| South Africa | 50% | 34% | 16% | +34 |
| Chile | 45% | 35% | 20% | +25 |
| Argentina | 42% | 41% | 17% | +25 |
| Turkey | 41% | 27% | 32% | +9 |
| United States | 39% | 42% | 20% | +19 |
| Sweden | 33% | 38% | 30% | +3 |
| South Korea | 30% | 52% | 19% | +11 |
| Australia | 29% | 46% | 25% | +4 |
| Canada | 27% | 46% | 27% | 0 |
| Poland | 24% | 37% | 40% | -16 |
| Russia | 24% | 38% | 39% | -15 |
| Serbia | 22% | 38% | 40% | -18 |
| Spain | 22% | 52% | 26% | -4 |
| Great Britain | 21% | 48% | 31% | -10 |
| Hungary | 20% | 42% | 37% | -17 |
| Italy | 20% | 49% | 32% | -12 |
| France | 17% | 55% | 28% | -11 |
| Germany | 17% | 59% | 25% | -8 |
| Belgium | 14% | 58% | 27% | -13 |
| Japan | 11% | 52% | 38% | -27 |

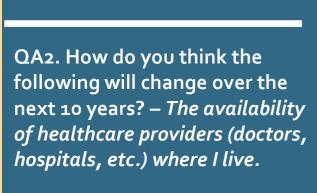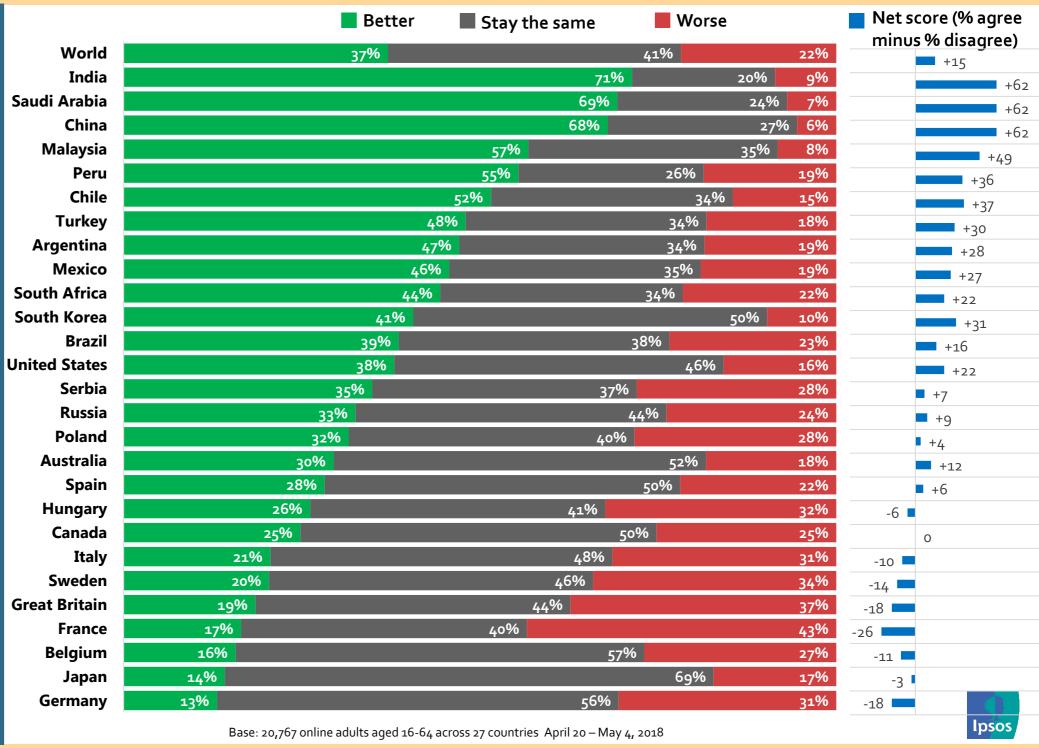Base: 20,767 online adults aged 16-64 across 27 countries  April 20 – May 4, 2018

Ipsos

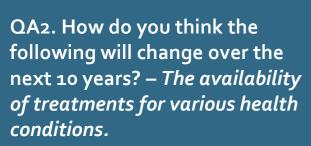# Expected 10-Year Change – Quality of Own Healthcare

**QA2. How do you think the following will change over the next 10 years? – The quality of my and my family's healthcare (doctors, hospitals, medicine, etc.).**
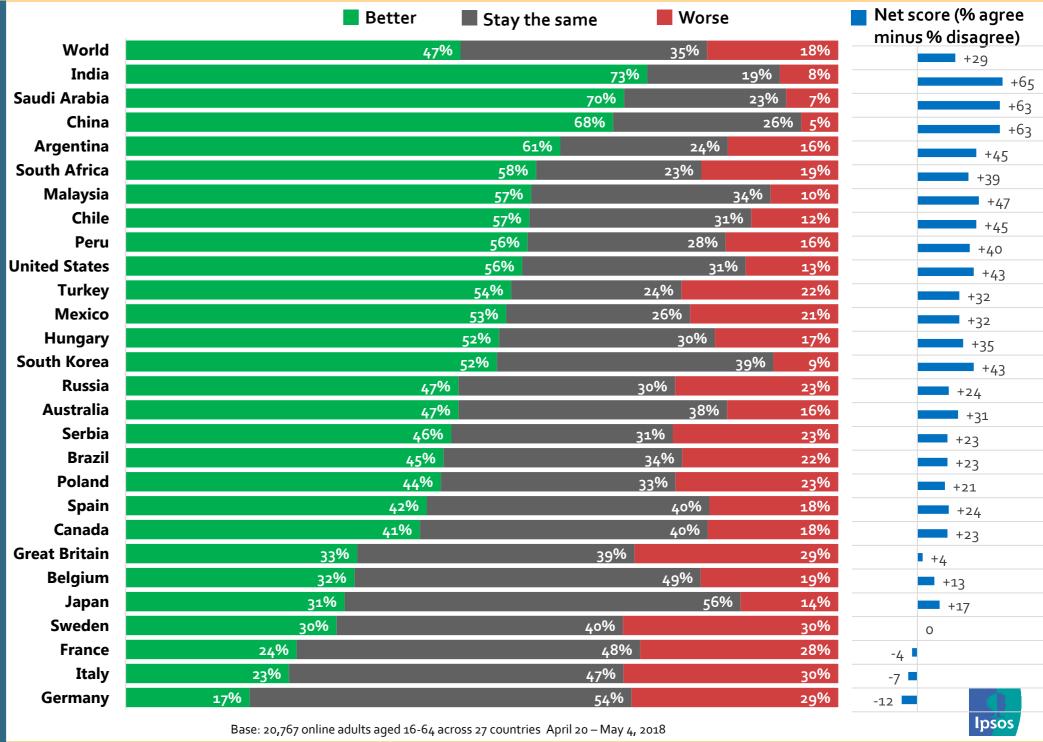
Legend: ■ Better ■ Stay the same ■ Worse ■ Net score (% agree minus % disagree)

| Country | Better | Stay the same | Worse | Net score |
|---|---|---|---|---|
| World | 39% | 40% | 21% | +18 |
| India | 69% | 21% | 9% | +60 |
| China | 68% | 26% | 7% | +61 |
| Saudi Arabia | 67% | 26% | 8% | +59 |
| Malaysia | 56% | 35% | 10% | +46 |
| Turkey | 52% | 25% | 24% | +28 |
| Argentina | 51% | 31% | 18% | +33 |
| Peru | 51% | 32% | 18% | +33 |
| Chile | 50% | 36% | 14% | +36 |
| Mexico | 49% | 33% | 18% | +31 |
| South Africa | 49% | 32% | 20% | +29 |
| South Korea | 48% | 43% | 8% | +40 |
| Brazil | 43% | 36% | 21% | +22 |
| United States | 40% | 44% | 16% | +24 |
| Serbia | 37% | 38% | 25% | +12 |
| Russia | 36% | 40% | 24% | +12 |
| Poland | 33% | 41% | 26% | +7 |
| Australia | 31% | 51% | 18% | +13 |
| Spain | 29% | 46% | 25% | +4 |
| Canada | 28% | 50% | 22% | +6 |
| Hungary | 26% | 39% | 34% | -8 |
| Belgium | 24% | 56% | 19% | +5 |
| Japan | 23% | 62% | 15% | +8 |
| Sweden | 23% | 46% | 31% | -8 |
| France | 22% | 47% | 31% | -9 |
| Italy | 22% | 48% | 30% | -8 |
| Great Britain | 21% | 47% | 32% | -11 |
| Germany | 16% | 54% | 30% | -14 |

Base: 20,767 online adults aged 16-64 across 27 countries  April 20 – May 4, 2018

Ipsos

65

# Expected 10-Year Change – Cost of Own Healthcare

**Better** ▮  **Stay the same** ▮  **Worse** ▮  **Net score (% agree minus % disagree)** ▮

| Country | Better | Stay the same | Worse | Net score |
|---|---|---|---|---|
| World | 30% | 36% | 34% | -4 |
| China | 64% | 28% | 8% | +56 |
| Saudi Arabia | 61% | 26% | 13% | +48 |
| India | 60% | 19% | 21% | +39 |
| Malaysia | 51% | 28% | 21% | +30 |
| Peru | 48% | 31% | 21% | +27 |
| Mexico | 40% | 29% | 32% | +8 |
| Chile | 40% | 36% | 25% | +15 |
| South Korea | 38% | 45% | 18% | +20 |
| Argentina | 36% | 31% | 33% | +3 |
| Brazil | 36% | 35% | 29% | +7 |
| Turkey | 32% | 24% | 44% | -12 |
| South Africa | 29% | 21% | 50% | -21 |
| Poland | 28% | 35% | 37% | -9 |
| United States | 27% | 27% | 46% | -19 |
| Russia | 23% | 35% | 42% | -19 |
| Serbia | 23% | 36% | 41% | -18 |
| Spain | 22% | 47% | 31% | -9 |
| Australia | 20% | 35% | 45% | -25 |
| Hungary | 19% | 31% | 50% | -31 |
| Sweden | 17% | 47% | 36% | -19 |
| Canada | 17% | 47% | 36% | -19 |
| Italy | 17% | 42% | 41% | -24 |
| France | 17% | 41% | 43% | -26 |
| Great Britain | 15% | 47% | 38% | -23 |
| Belgium | 13% | 46% | 41% | -28 |
| Japan | 12% | 55% | 34% | -22 |
| Germany | 11% | 48% | 41% | -30 |

QA2. How do you think the following will change over the next 10 years? – *The cost of my and my family's healthcare (doctors, hospitals, medicine, etc.).*

Base: 20,767 online adults aged 16-64 across 27 countries  April 20 – May 4, 2018

Ipsos

# Expected 10-Year Change – Availability of Providers

**Better** | **Stay the same** | **Worse**

**Net score (% agree minus % disagree)**

| Country | Better | Stay the same | Worse | Net score |
|---|---|---|---|---|
| World | 37% | 41% | 22% | +15 |
| India | 71% | 20% | 9% | +62 |
| Saudi Arabia | 69% | 24% | 7% | +62 |
| China | 68% | 27% | 6% | +62 |
| Malaysia | 57% | 35% | 8% | +49 |
| Peru | 55% | 26% | 19% | +36 |
| Chile | 52% | 34% | 15% | +37 |
| Turkey | 48% | 34% | 18% | +30 |
| Argentina | 47% | 34% | 19% | +28 |
| Mexico | 46% | 35% | 19% | +27 |
| South Africa | 44% | 34% | 22% | +22 |
| South Korea | 41% | 50% | 10% | +31 |
| Brazil | 39% | 38% | 23% | +16 |
| United States | 38% | 46% | 16% | +22 |
| Serbia | 35% | 37% | 28% | +7 |
| Russia | 33% | 44% | 24% | +9 |
| Poland | 32% | 40% | 28% | +4 |
| Australia | 30% | 52% | 18% | +12 |
| Spain | 28% | 50% | 22% | +6 |
| Hungary | 26% | 41% | 32% | -6 |
| Canada | 25% | 50% | 25% | 0 |
| Italy | 21% | 48% | 31% | -10 |
| Sweden | 20% | 46% | 34% | -14 |
| Great Britain | 19% | 44% | 37% | -18 |
| France | 17% | 40% | 43% | -26 |
| Belgium | 16% | 57% | 27% | -11 |
| Japan | 14% | 69% | 17% | -3 |
| Germany | 13% | 56% | 31% | -18 |

QA2. How do you think the following will change over the next 10 years? – *The availability of healthcare providers (doctors, hospitals, etc.) where I live.*

Base: 20,767 online adults aged 16-64 across 27 countries April 20 – May 4, 2018

Ipsos

# Expected 10-Year Change – Availability of Treatments

**Better** | **Stay the same** | **Worse**

**Net score (% agree minus % disagree)**

| Country | Better | Stay the same | Worse | Net score |
|---|---|---|---|---|
| World | 47% | 35% | 18% | +29 |
| India | 73% | 19% | 8% | +65 |
| Saudi Arabia | 70% | 23% | 7% | +63 |
| China | 68% | 26% | 5% | +63 |
| Argentina | 61% | 24% | 16% | +45 |
| South Africa | 58% | 23% | 19% | +39 |
| Malaysia | 57% | 34% | 10% | +47 |
| Chile | 57% | 31% | 12% | +45 |
| Peru | 56% | 28% | 16% | +40 |
| United States | 56% | 31% | 13% | +43 |
| Turkey | 54% | 24% | 22% | +32 |
| Mexico | 53% | 26% | 21% | +32 |
| Hungary | 52% | 30% | 17% | +35 |
| South Korea | 52% | 39% | 9% | +43 |
| Russia | 47% | 30% | 23% | +24 |
| Australia | 47% | 38% | 16% | +31 |
| Serbia | 46% | 31% | 23% | +23 |
| Brazil | 45% | 34% | 22% | +23 |
| Poland | 44% | 33% | 23% | +21 |
| Spain | 42% | 40% | 18% | +24 |
| Canada | 41% | 40% | 18% | +23 |
| Great Britain | 33% | 39% | 29% | +4 |
| Belgium | 32% | 49% | 19% | +13 |
| Japan | 31% | 56% | 14% | +17 |
| Sweden | 30% | 40% | 30% | 0 |
| France | 24% | 48% | 28% | -4 |
| Italy | 23% | 47% | 30% | -7 |
| Germany | 17% | 54% | 29% | -12 |

QA2. How do you think the following will change over the next 10 years? – *The availability of treatments for various health conditions.*

Base: 20,767 online adults aged 16-64 across 27 countries  April 20 – May 4, 2018

Ipsos

68

# Expected 10-Year Change – Agree Summary (% agree)

| QA2. How do you think the following will change over the next 10 years? (% agree) | WORLD | ARG | AUS | BEL | BRA | CAN | CHL | CHN | FRA | GBR | DEU | HUN | IND | ITA | JPN | KOR | MYS | MEX | PER | POL | RUS | SAU | SRB | ZAF | ESP | SWE | TUR | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| My own health | 35% | 42% | 29% | 14% | 52% | 27% | 45% | 57% | 17% | 21% | 17% | 20% | 66% | 20% | 11% | 30% | 53% | 56% | 56% | 24% | 24% | 63% | 22% | 50% | 22% | 33% | 41% | 39% |
| The availability of healthcare providers (doctors, hospitals, etc.) where I live | 37% | 47% | 30% | 16% | 39% | 25% | 52% | 68% | 17% | 19% | 13% | 26% | 71% | 21% | 14% | 41% | 57% | 46% | 55% | 32% | 33% | 69% | 35% | 44% | 28% | 20% | 48% | 38% |
| The availability of treatments for various health conditions | 47% | 61% | 47% | 32% | 45% | 41% | 57% | 68% | 24% | 33% | 17% | 52% | 73% | 23% | 31% | 52% | 57% | 53% | 56% | 44% | 47% | 70% | 46% | 58% | 42% | 30% | 54% | 56% |
| The cost of my and my family's healthcare (doctors, hospitals, medicine, etc.) | 30% | 36% | 20% | 13% | 36% | 17% | 40% | 64% | 17% | 15% | 11% | 19% | 60% | 17% | 12% | 38% | 51% | 40% | 48% | 28% | 23% | 61% | 23% | 29% | 22% | 17% | 32% | 27% |
| The quality of my and my family's healthcare (doctors, hospitals, medicine, etc.) | 39% | 51% | 31% | 24% | 43% | 28% | 50% | 68% | 22% | 21% | 16% | 26% | 69% | 22% | 23% | 48% | 56% | 49% | 51% | 33% | 36% | 67% | 37% | 49% | 29% | 23% | 52% | 40% |

Base: 20,767 online adults aged 16-64 across 27 countries  April 20 – May 4, 2018

Ipsos

# Expected 10-Year Change-Disagree Summary (% disagree)

| QA2. How do you think the following will change over the next 10 years? (% disagree) | WORLD | ARG | AUS | BEL | BRA | CAN | CHL | CHN | FRA | GBR | DEU | HUN | IND | ITA | JPN | KOR | MYS | MEX | PER | POL | RUS | SAU | SRB | ZAF | ESP | SWE | TUR | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| My own health | 25% | 17% | 25% | 27% | 15% | 27% | 20% | 15% | 28% | 31% | 25% | 37% | 13% | 32% | 38% | 19% | 14% | 13% | 14% | 40% | 39% | 8% | 40% | 16% | 26% | 30% | 32% | 20% |
| The availability of healthcare providers (doctors, hospitals, etc.) where I live | 22% | 19% | 18% | 27% | 23% | 25% | 15% | 6% | 43% | 37% | 31% | 32% | 9% | 31% | 17% | 10% | 8% | 19% | 19% | 28% | 24% | 7% | 28% | 22% | 22% | 34% | 18% | 16% |
| The availability of treatments for various health conditions | 18% | 16% | 16% | 19% | 22% | 18% | 12% | 5% | 28% | 29% | 29% | 17% | 8% | 30% | 14% | 9% | 10% | 21% | 16% | 23% | 23% | 7% | 23% | 19% | 18% | 30% | 22% | 13% |
| The cost of my and my family's healthcare (doctors, hospitals, medicine, etc.) | 34% | 33% | 45% | 41% | 29% | 36% | 25% | 8% | 43% | 38% | 41% | 50% | 21% | 41% | 34% | 18% | 21% | 32% | 21% | 37% | 42% | 13% | 41% | 50% | 31% | 36% | 44% | 46% |
| The quality of my and my family's healthcare (doctors, hospitals, medicine, etc.) | 21% | 18% | 18% | 19% | 21% | 22% | 14% | 7% | 31% | 32% | 30% | 34% | 9% | 30% | 15% | 8% | 10% | 18% | 18% | 26% | 24% | 8% | 25% | 20% | 25% | 31% | 24% | 16% |

Base: 20,767 online adults aged 16-64 across 27 countries  April 20 – May 4, 2018

Ipsos

# Expected 10-Year Change-Net Summary (% agree minus % disagree)

| QA2. How do you think the following will change over the next 10 years? (% agree minus % disagree) | WORLD | ARG | AUS | BEL | BRA | CAN | CHL | CHN | FRA | GBR | DEU | HUN | IND | ITA | JPN | KOR | MYS | MEX | PER | POL | RUS | SAU | SRB | ZAF | ESP | SWE | TUR | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| My own health | 10% | 25% | 5% | -13% | 36% | 0% | 25% | 42% | -11% | -10% | -8% | -17% | 53% | -12% | -27% | 11% | 39% | 42% | 42% | -16% | -15% | 55% | -18% | 34% | -4% | 3% | 8% | 19% |
| The availability of healthcare providers (doctors, hospitals, etc.) where I live | 15% | 29% | 11% | -11% | 15% | 0% | 37% | 63% | -27% | -19% | -17% | -6% | 63% | -11% | -3% | 31% | 49% | 27% | 37% | 3% | 9% | 62% | 7% | 23% | 6% | -14% | 30% | 22% |
| The availability of treatments for various health conditions | 29% | 46% | 31% | 13% | 23% | 23% | 44% | 63% | -4% | 4% | -12% | 35% | 65% | -7% | 17% | 43% | 47% | 33% | 41% | 21% | 24% | 63% | 23% | 38% | 24% | -1% | 32% | 43% |
| The cost of my and my family's healthcare (doctors, hospitals, medicine, etc.) | -4% | 3% | -26% | -28% | 7% | -19% | 15% | 56% | -26% | -23% | -30% | -31% | 40% | -24% | -22% | 20% | 29% | 8% | 28% | -9% | -19% | 49% | -19% | -21% | -9% | -19% | -13% | -19% |
| The quality of my and my family's healthcare (doctors, hospitals, medicine, etc.) | 18% | 33% | 14% | 5% | 22% | 6% | 36% | 61% | -9% | -11% | -14% | -8% | 60% | -9% | 8% | 40% | 46% | 31% | 33% | 7% | 12% | 59% | 12% | 29% | 4% | -9% | 28% | 24% |