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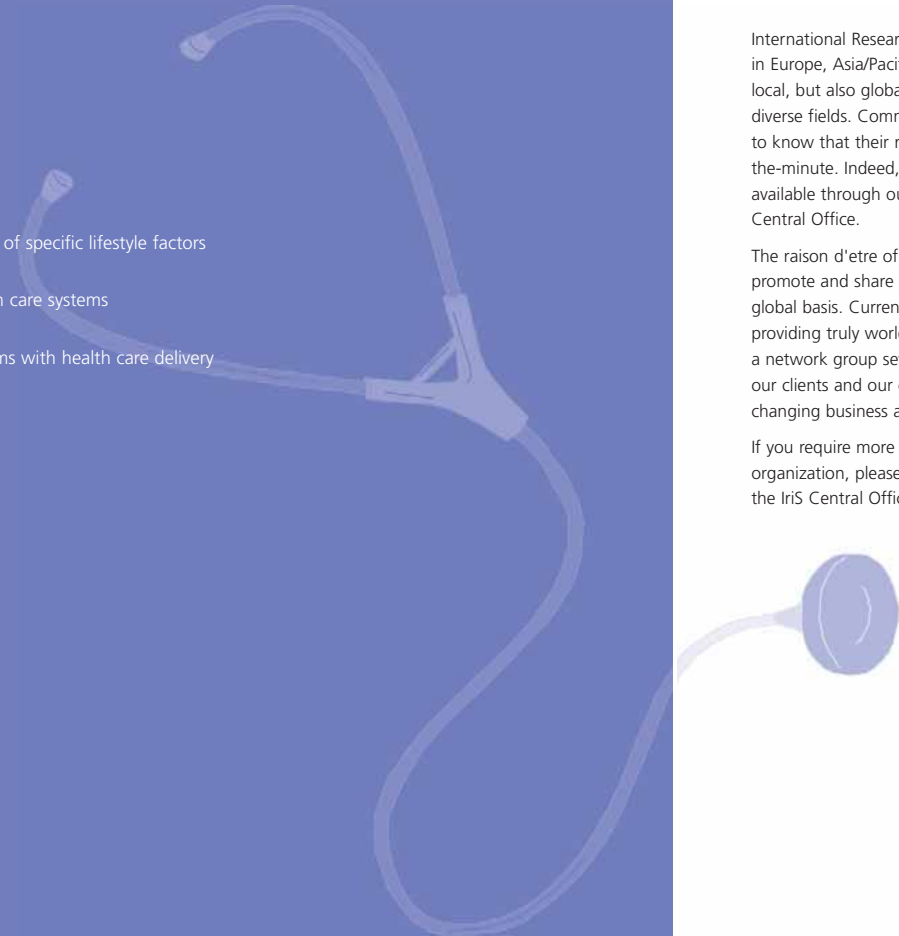
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Health Perceptions around the Globe

a 23-country study

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About IriS

International Research Institutes (IriS) is a network of independent marketing research companies in Europe, Asia/Pacific, Africa and North and South America. Together, we offer clients not just local, but also global research and consulting capabilities of the highest standard, in many diverse fields. Committed to a common survey research quality standard, IriS enables our clients to know that their research project is in safe hands, that the results will be accurate and up-to-the-minute. Indeed, all IriS members conform to a common Quality Code. A copy of this Code is available through our website www.irisnetwork.org, from your local IriS member or from the Central Office.

The *raison d'être* of the IriS network is to harness members' knowledge of local markets, to promote and share our collective expertise and to optimize the use of that information on a global basis. Currently, with members in 30 countries, the IriS network is a global operation providing truly worldwide research results. Constantly in touch with one another, and meeting as a network group several times a year, members exchange ideas and research techniques to help our clients and our own organizations maintain a competitive edge in today's continuously changing business arena.

If you require more information about the IriS network, or what IriS can offer you and your organization, please visit our website www.irisnetwork.org, or contact your local IriS member or the IriS Central Office. (Please see back page for details.)

Foreword

Survey after survey in countries around the globe have shown that health care is one of the leading issues on people's minds. We also know that both governments and individuals are evolving in their understanding of what it takes to sustain, if not improve, national health care systems. There is a growing awareness that it is not enough, for instance, to simply throw money at the traditional delivery systems of medical personnel, equipment and facilities.

Moreover, in many countries, over the past few decades, the role of health care systems has shifted toward more holistic approaches that put more emphasis on the prevention of illness, rather than simply treating illness after it occurs, and toward greater individual responsibility for the state of one's personal health.

This survey was designed to explore and compare the perceptions and expectations of the public in 23 countries around the world. This is one of the most comprehensive undertakings of its kind and may serve as a baseline for future surveys. We hope that you and your colleagues will be able to use these data as building blocks for further investigations into related areas of inquiry. We welcome your comments and suggestions as to how IriS can assist you in this and other research endeavours.

We look forward to hearing from you.

Jhr. Allert R. de Lange
President, IriS
September 2004

About this study

Interviews were conducted among a total of 19,995 people in 23 countries during the months of June to August, 2004. Respondents were aged 18 or older, except in eight countries (China, the Czech Republic, Great Britain, Ireland, Italy, the Netherlands, Sweden and Switzerland) where the samples included a small number of people (just 2 % of the total multi-country sample) who were between the ages of 14 and 17. All of the research companies involved are members of IriS.

The adjacent table shows the sample size for each country. However, the reader is advised that each country's data were weighted (up or down) to 1,000 so that all have equal impact on the final results. Where necessary, tables were weighted to effect approximately equal distributions of men (48%) and women (52%).

Country	Number of Interviews Unweighted
Argentina	502
Canada	2,020
China	500
Czech Republic	515
France	500
Germany	504
Great Britain	1,002
Greece	500
Indonesia	1,000
Ireland	1,199
Italy	1,004
Japan	2,000
Kazakhstan	1,200
Korea	454
Mexico	1,253
Netherlands (The)	1,003
Nigeria	1,000
Poland	810
Russian Federation	517
Spain	500
Sweden	504
Switzerland	1,005
United States	503

Highlights of the research

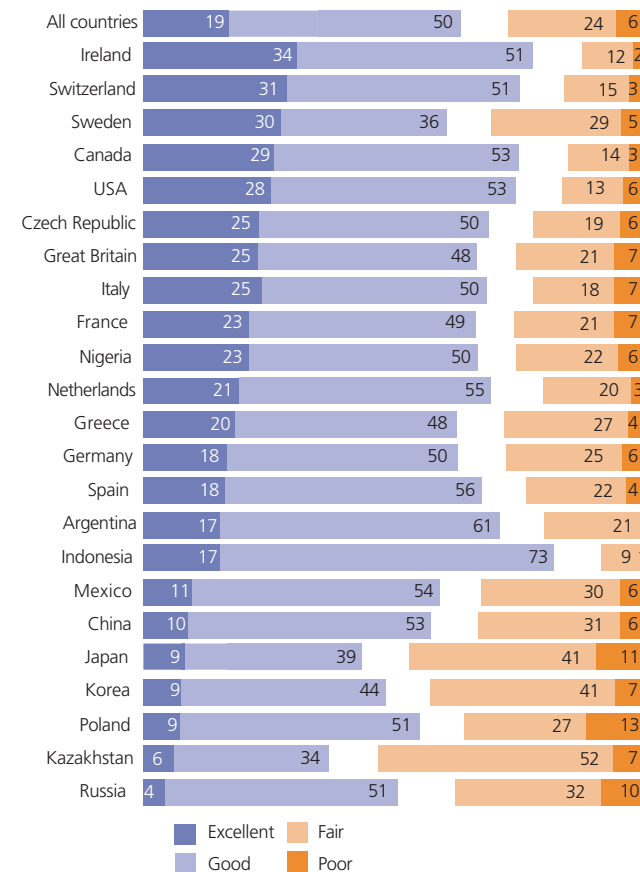
- ▶ The survey finds that, worldwide, people are generally optimistic about their own health and have a sense of some control over that aspect of their lives. Most respondents describe their personal state of health as being good. Out of 23 countries, Kazakhstan and Japan are the only ones in which fewer than a majority of respondents consider themselves to be in good or excellent health, and in no country do more than one in ten say they're in poor health.
- ▶ In most countries, awareness of the impact of specific lifestyle factors on personal health is widespread, although no one factor dominates worldwide. When people are asked to rate the importance of six specific factors - diet, physical exercise, tobacco use, excessive alcohol use, stress/anxiety, and outlook on life - as determinants of overall personal health, there are very few instances in which a majority in any country dismisses a factor as not very/not all important. For each factor, the survey found that majorities in about two-thirds of the countries actually considered the factor to be "very" important.
- ▶ The greatest range of perceptions was found when respondents were asked about the impact of tobacco use - from countries such as Argentina, Canada, France, Greece, the Netherlands, Poland, Spain, Great Britain, and the United States (where two-thirds or more consider it a very important determinant of health) to Mexico, Indonesia and the Czech Republic (where majorities dismiss tobacco use as a not very/not at all important determinant of health).

BUT

- ▶ Respondents' optimism regarding their personal health status does not translate into confidence in their nation's health care system. In 20 out of 23 countries, majorities - and in many cases large majorities - describe their nation's health care system as being "in a state of crisis," and in 17 out of 23 countries, majorities - again, often large majorities - disapprove of their government's handling of health care.
- ▶ Just nine of the 23 countries surveyed are confident that their nation's health care services are among the best in the world. Although 13 of the 23 countries express overall confidence that they would have timely access to the system if they needed it, this confidence is of the lukewarm rather than enthusiastic variety in every country except Spain. And in most countries, there is even less confidence in the system's ability to reach out to the most vulnerable. Canada, China, France and Germany are the four exceptions to this pattern - in these cases, the systems are seen as being equally effective on both measures. However, of those four countries, China is the only one in which this appears to translate into high marks for the system overall.
- ▶ Despite the level of concern about the state of the world's health care systems - or perhaps because of it - the public may be ready to entertain some fundamental reforms. Although complaints about lack of funding for health care have been heard around the world for several years now, there is little or no positive correlation between approval of a government's handling of health care and perceptions that problems in the health care system are the result of underfunding. This finding strongly suggests that people do not see more money as the remedy for failings in the system. Rather, people recognize, as do many experts in the field, that most problems in the system are likely due to structural and systemic issues that must be addressed by finding new ways to manage health care.
- ▶ At the same time as the public seems to be calling for fundamental change in the way health care is managed, there is almost a worldwide consensus that health care should be funded mostly by the public purse. When respondents were asked about their preference regarding government vs. private funding of health care, there is a strong consensus in all but three of the 23 countries that health care systems should be publicly financed. Switzerland is the only country in which a majority favour private funding. Opinion is evenly divided in the United States, where private funding slightly outweighs public funding, and in Indonesia.

Personal health and perceptions of specific lifestyle factors

Self-reported personal health status



Most respondents consider their health to be at least "good" but few consider themselves to be in "excellent" health. In no country do more than one in ten consider themselves in "poor" health.

The Irish are the most likely to say they're in excellent health - almost equally confident are residents of Sweden, Switzerland, Canada and the United States.

The least confident in this regard are residents of China, Japan, Kazakhstan, Korea, Mexico, Poland, and the Russian Federation (where one in ten or fewer use that descriptor for themselves).

► Perceptions re impact of selected lifestyle factors on personal health - very important

	Physical Exercise	Diet	Tobacco Use	Stress/Anxiety	Excessive Alcohol Use	Outlook on Life
All countries	58	57	53	52	50	50
Argentina	73	78	69	65	53	74
Canada	73	69	73	69	74	66
China	48	59	28	20	19	39
Czech Republic	35	58	24	28	22	33
France	46	63	77	56	72	39
Germany	57	70	50	53	58	49
Great Britain	62	70	65	65	66	58
Greece	47	69	71	73	64	43
Indonesia	72	26	18	24	25	54
Ireland	70	78	55	55	56	57
Italy	66	46	56	62	58	49
Japan	37	9	56	65	29	45
Kazakhstan	37	29	38	41	42	38
Korea	56	55	58	63	46	56
Mexico	64	54	16	19	11	54
Netherlands	76	29	68	65	70	36
Nigeria	68	68	30	21	32	34
Poland	52	68	72	66	61	52
Russia	63	68	51	54	54	60
Spain	65	72	75	73	77	72
Sweden	53	39	55	52	59	27
Switzerland	52	64	43	39	43	37
USA	68	70	62	69	69	74

Highlighted areas show leading issues in each country

When respondents are asked to rate the importance of six specific factors - diet, physical exercise, tobacco use, excessive alcohol use, stress/anxiety, and outlook on life - in terms of their importance in determining a person's overall health, the results indicate that no one factor dominates worldwide. However, diet emerges as the leading issue in more countries than is the case for any of the other factors. There is also widespread recognition of the importance of physical exercise.

Diet is seen as the most important determinant of health in Argentina and Ireland. It also leads, to a lesser but still significant extent, in China, the Czech Republic, Germany, the Russian Federation, Switzerland and Great Britain. The perception that it is a very important factor is least prevalent in Japan; this perception is also expressed less often than average in Kazakhstan, the Netherlands and Indonesia.

Physical exercise is the leading factor in the Netherlands and Indonesia, and to a lesser extent, in Italy and Mexico. The perception that it is a very important factor is least prevalent in the Czech Republic, Kazakhstan and Japan.

Tobacco use is the leading factor in France and Poland. The perception that it is a very important factor is less prevalent in Mexico and Indonesia, as well as in China and the Czech Republic. In fact, in the Czech Republic, Indonesia and Mexico, majorities dismiss tobacco use as a not very/not at all important factor in determining a person's overall health!

Excessive alcohol use is the leading factor in Spain and, to a lesser extent, in Sweden. The perception that it is a very important factor is least prevalent in China, Japan, Indonesia and Mexico.

Stress/anxiety is the leading factor in Greece and, to a lesser extent, in Japan and Korea. The perception that it is a very important factor is least prevalent in China, Indonesia, Nigeria and Mexico.

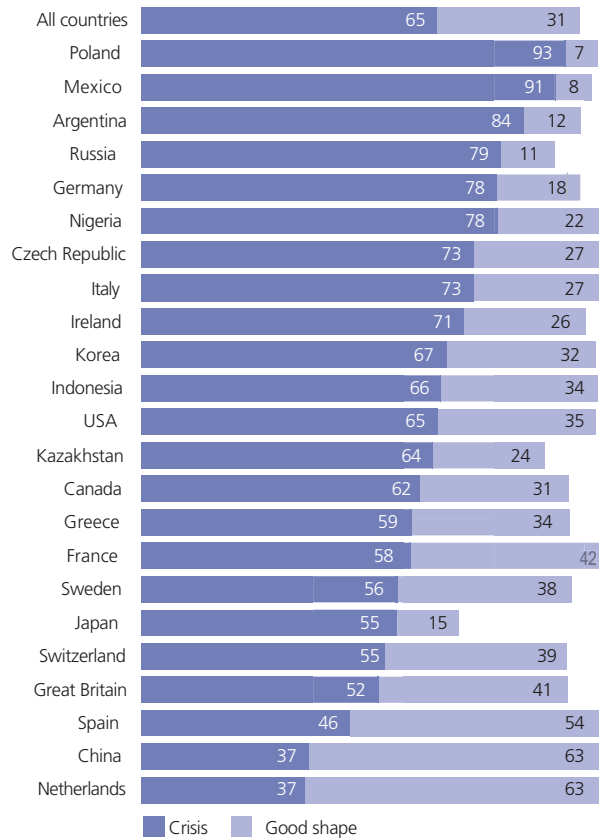
Outlook on life is the leading factor in the United States. The perception that it is a very important factor is least prevalent in Sweden.

No one factor dominates in Canada or in Spain (where roughly seven in ten consider each factor to be very important), or in Kazakhstan (where roughly three to four in ten consider each factor to be very important).

In Great Britain and the United States, between six and seven in ten consider each of the factors to be very important determinants of health.

Assessing the "health" of health care systems

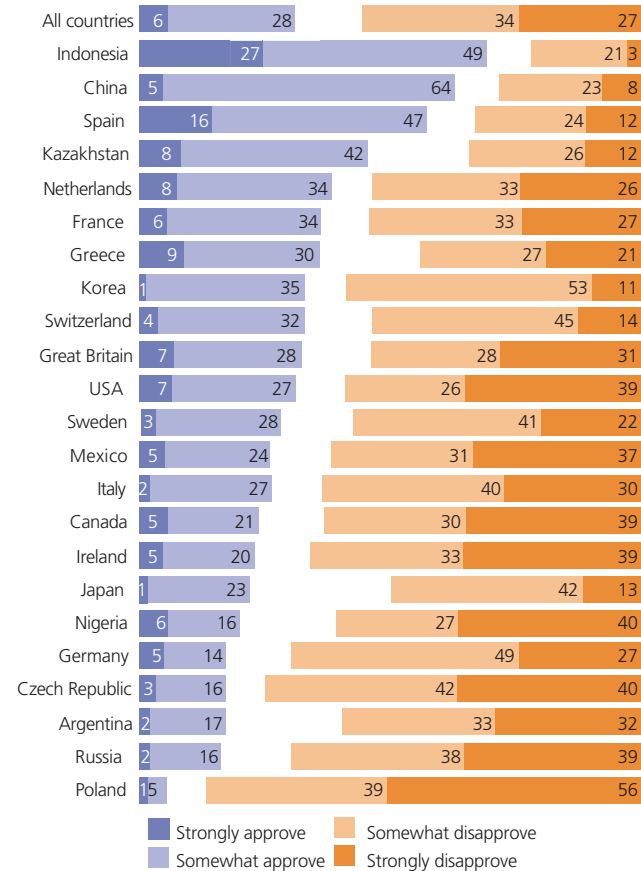
Overall assessment of health care systems



The survey results indicate that concern over the sustainability of health care systems is quite high in most of the countries included in the survey. China, the Netherlands and, to a lesser extent, Spain, are the only countries in which majorities say their health care system is in "basically good shape."

The most critical assessments are in Argentina, Germany, Mexico, Nigeria, Poland and the Russian Federation, where eight in ten or more say their health care system is "in a state of crisis."

Approval of national government's handling of health care

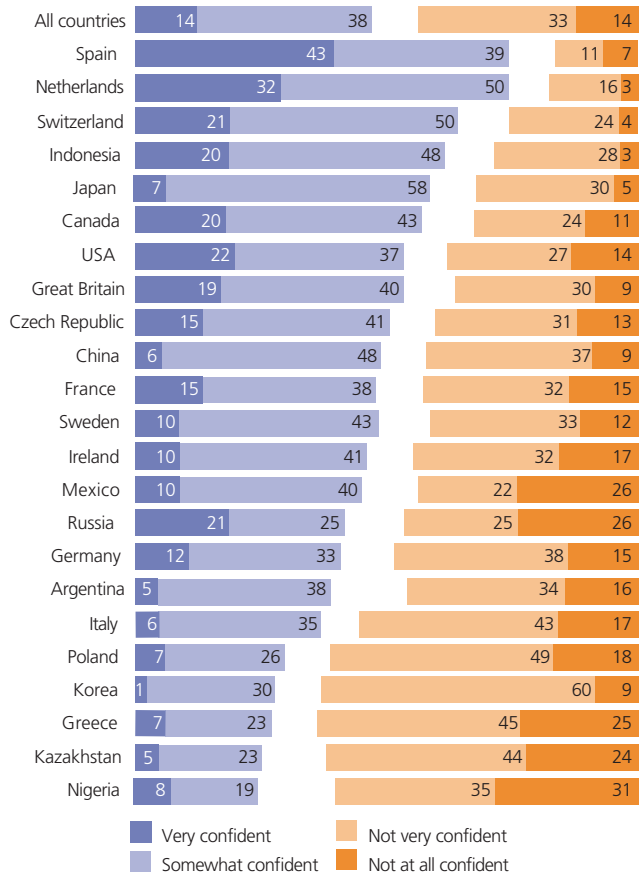


Strongly expressed approval of national governments' handling of the issue of health care is highest in Indonesia and Spain, although even in these countries, only a quarter or fewer of residents offer enthusiastic endorsements of their government's efforts. In every other country, findings stand at nine percent or lower.

Overall approval is highest in Indonesia, China and Spain, and just reaches the majority level in Kazakhstan. Approval is below the majority level everywhere else, including the Netherlands where residents think their system, overall, is in basically good shape. In Indonesia, the government receives very high marks overall for its handling of a system that two-thirds of residents describe as being "in a state of crisis."

Strongly expressed disapproval is highest in Poland (the only country in which this measure reaches the majority level).

► Confidence in specific aspects of health care systems - personal accessibility

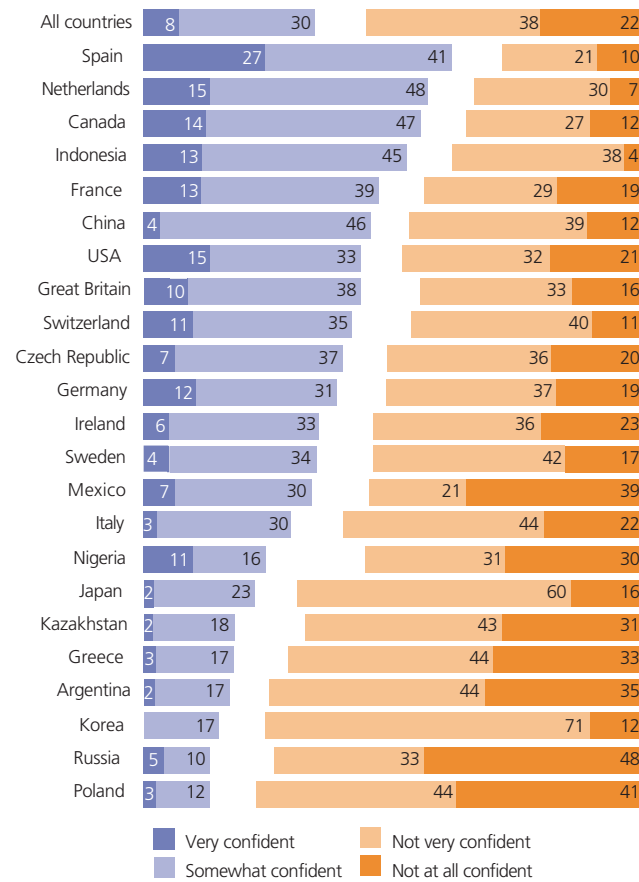


Strongly expressed confidence in personal access to health care varies from just under half of Spain's residents to fewer than ten percent in Argentina, China, Greece, Italy, Japan, Kazakhstan, Korea, Nigeria and Poland.

Overall confidence varies from a high of eight in ten residents of Spain and the Netherlands to about three in ten in Kazakhstan, Greece, Korea and Poland.

In most countries, confidence in personal access to the system does not translate into approval of the government's handling of health care issues. People may be fairly confident that they can get the health care they need personally, but the data suggest, they expect more than that from their governments. The largest gaps between a majority belief that the system is accessible on a personal level and the (always) much lower approval rating for the government are found in Japan, the Netherlands, the Czech Republic and Canada.

► Confidence in specific aspects of health care systems - caring for the more vulnerable



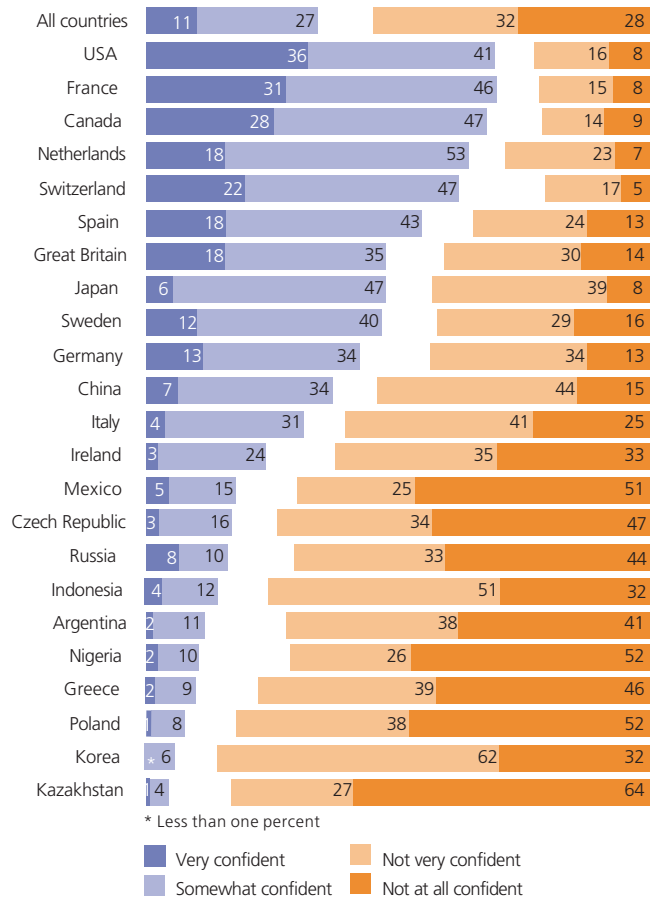
In most countries, there is less confidence in the ability of health care systems to reach society's most needy than in their ability to provide timely care for residents in general. The four exceptions to this pattern are Canada (where the health care system gets high marks on both measures, but the government still gets a rather low approval rating) and China, France and Germany (where the systems are generally seen as being equally effective on both measures, but get lower marks than those found in Canada). The largest gaps in confidence between personal access and confidence in the system's ability to provide care for the more vulnerable members of society are found in Japan, the Russian Federation and Switzerland.

Strongly expressed confidence in the ability of the health care system to care for the most vulnerable varies from a high of one-quarter of residents in Spain to fewer than ten percent in Argentina, China, the Czech Republic, Ireland, Italy, Greece, Japan, Kazakhstan, Korea, Mexico, Poland, the Russian Federation and Sweden.

Overall confidence varies from about two-thirds of residents in Spain and Canada to only about a fifth of residents in Argentina, Greece, Kazakhstan, Korea, Poland and the Russian Federation.

► Confidence in specific aspects of health care systems - among best in the world

Strongly expressed confidence that one's national health care system is the best in the world varies from approximately three in ten residents in Canada, France and the United States to fewer than ten percent in Argentina, China, the Czech Republic, Greece, Indonesia, Ireland, Italy, Japan, Kazakhstan, Korea, Mexico, Nigeria, Poland and the Russian Federation.

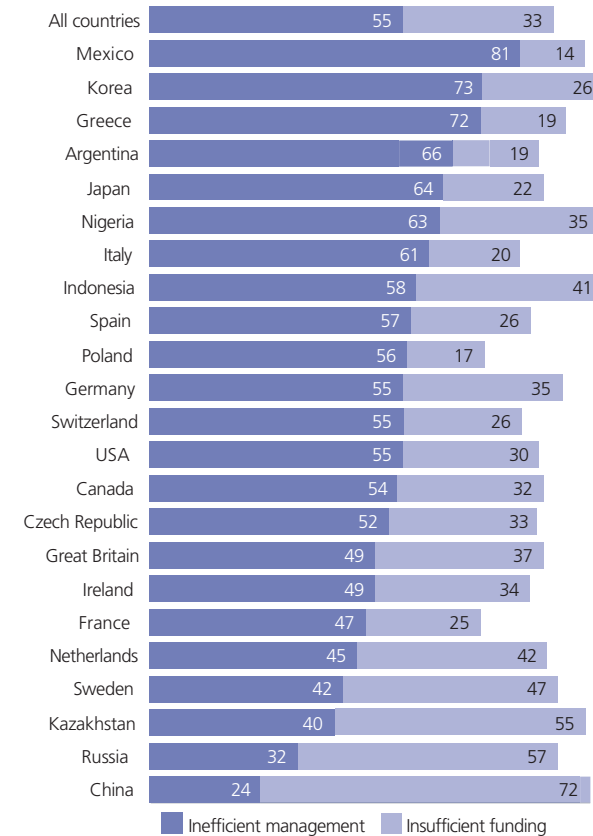


There are five countries in which majorities express confidence in both their personal access to care and their health care system's ability to reach out to the more vulnerable - Canada, France, Indonesia, the Netherlands and Spain. In each of these, with the exception of Indonesia, majorities also say their health care system is the best in the world.

Of the nine countries in which a majority say theirs is the best health care system in the world, in only Spain and the Netherlands is there a majority consensus that that same system is in "basically good shape."

Considering solutions to problems with health care delivery

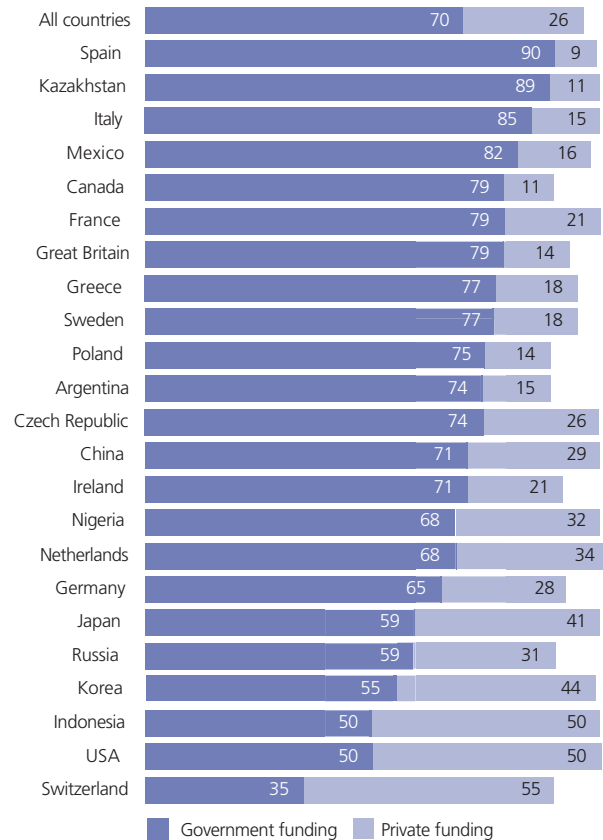
► Root of problems in health care system – funding vs. management



Respondents are generally more likely to place the blame for problems on the management of the health care system than on the funding available to the system. In Argentina, Greece, Japan, Korea and Mexico, two-thirds or more say problems are due to "inefficient management." However, this is the majority opinion in 15 of the 23 countries included in the study.

Opinion is divided in the Netherlands and Sweden. China, Kazakhstan and the Russian Federation are the only countries in which majorities say the problems are mainly due to insufficient funding; in all three countries there is a clear preference for public funding of health care services.

Public vs. private funding



The survey finds what amounts to almost a worldwide consensus that health care should be publicly funded. In 20 out of 23 countries, majorities say that the health care expenses of individuals should be paid for mainly by governments through taxation. Support for government funding is highest in Spain, Italy and Kazakhstan.

Switzerland is the only country in which a majority say health care expenses should be paid for mainly by private individuals, either through private insurance or out of their own pockets. However, even here a significant minority opt for the public purse. Residents of Japan also express fairly significant - but still minority - support for private funding, but here, a majority favour government funding.

Opinion is evenly divided in the United States and Indonesia.

Notes

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