

The background of the slide is a close-up photograph of medical equipment. It features a silver stethoscope resting on a white ECG (heart rate) monitor strip. A red and black ballpoint pen is also visible in the lower right corner. The overall scene is brightly lit, with a soft focus on the background elements.

The public, money, the NHS and the future

Ben Page, Chief Executive, Ipsos MORI

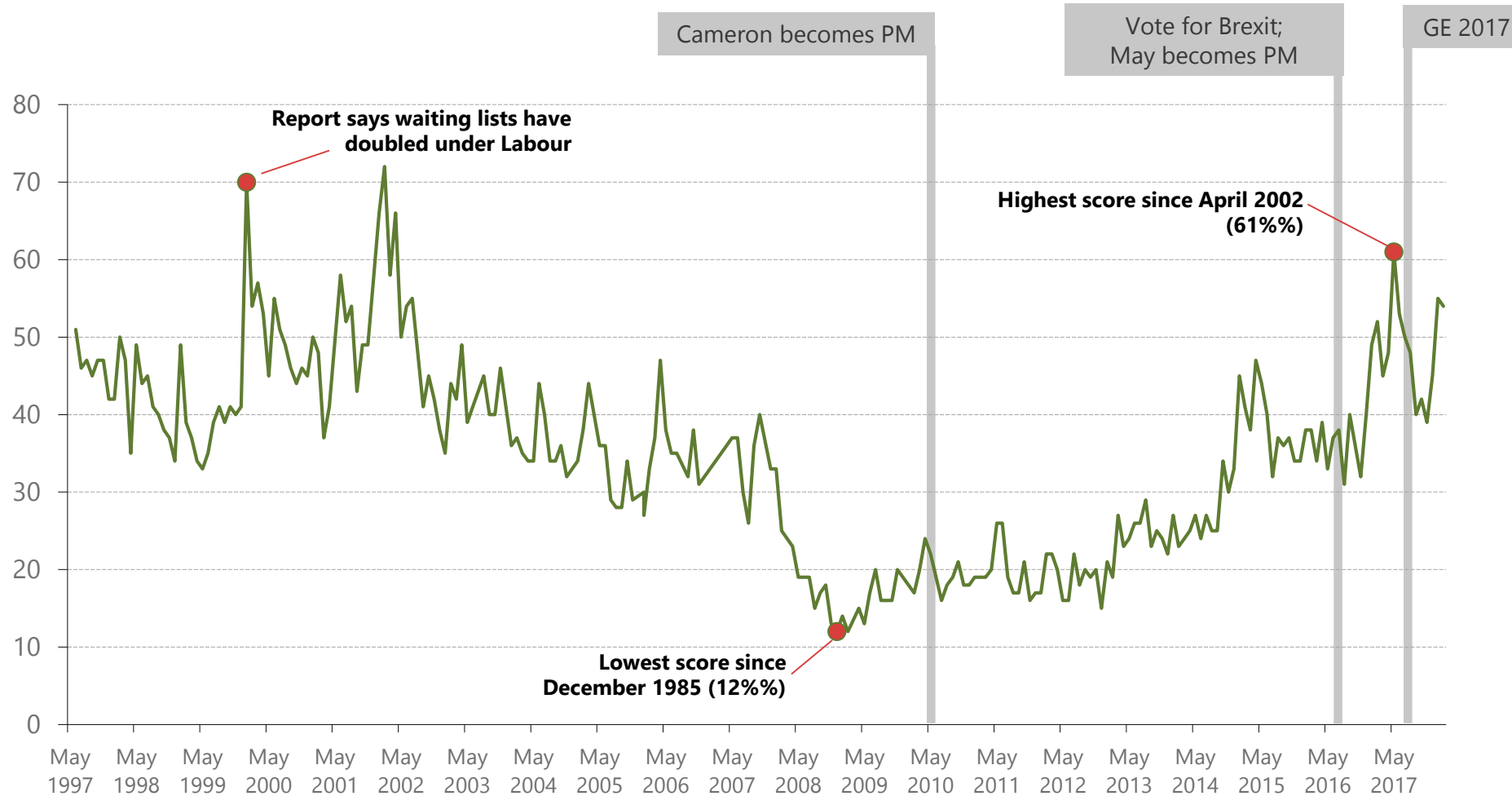
Ben.page@ipsos.com



Concern about the NHS has been rising for years

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

2



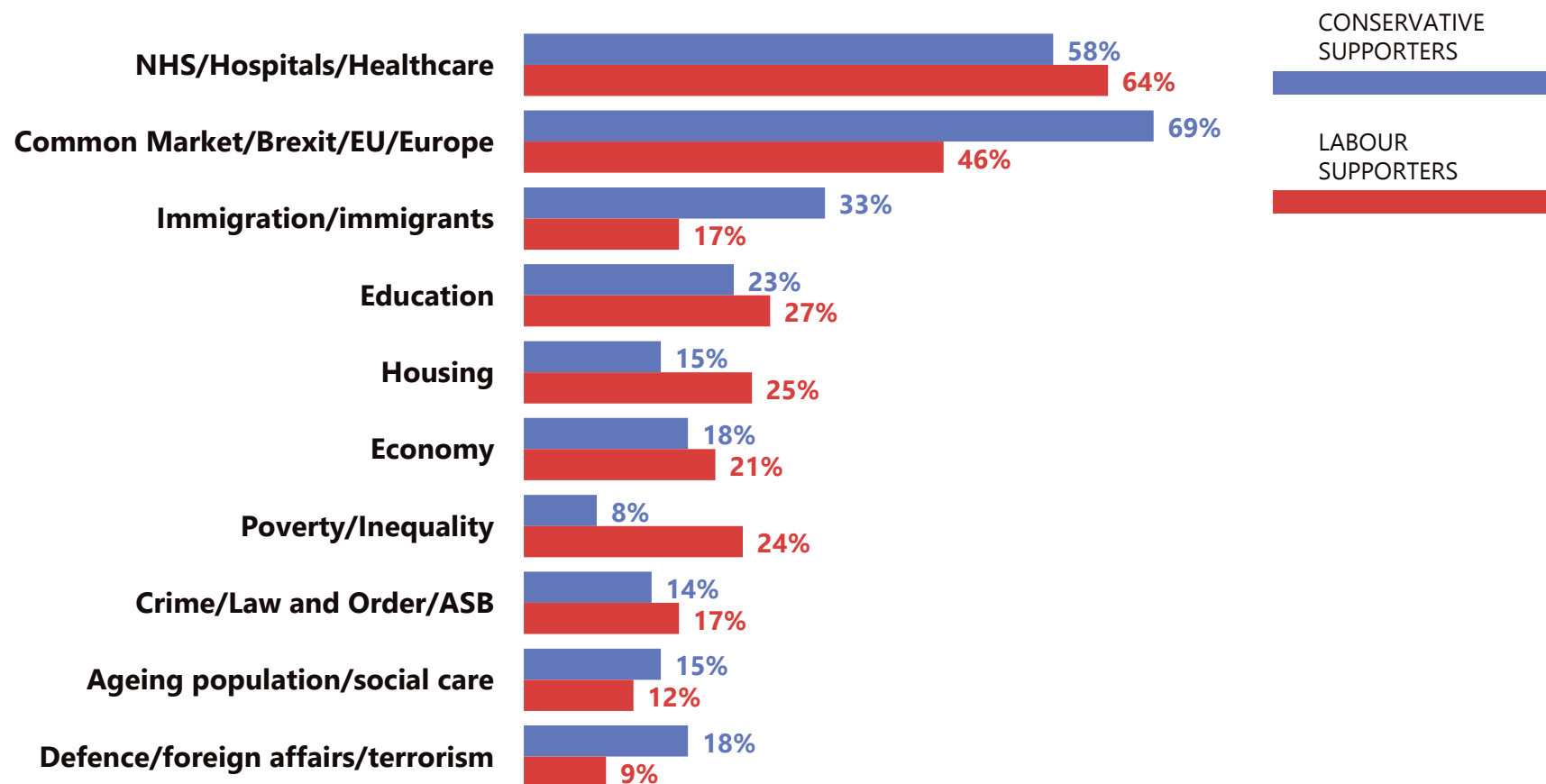
Base: representative sample of c.1,000 British adults age 18+ each month, interviewed face-to-face in home

Source: Ipsos MORI Issues Index

Concern unites young and old, and Conservative and Labour

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

Top mentions %

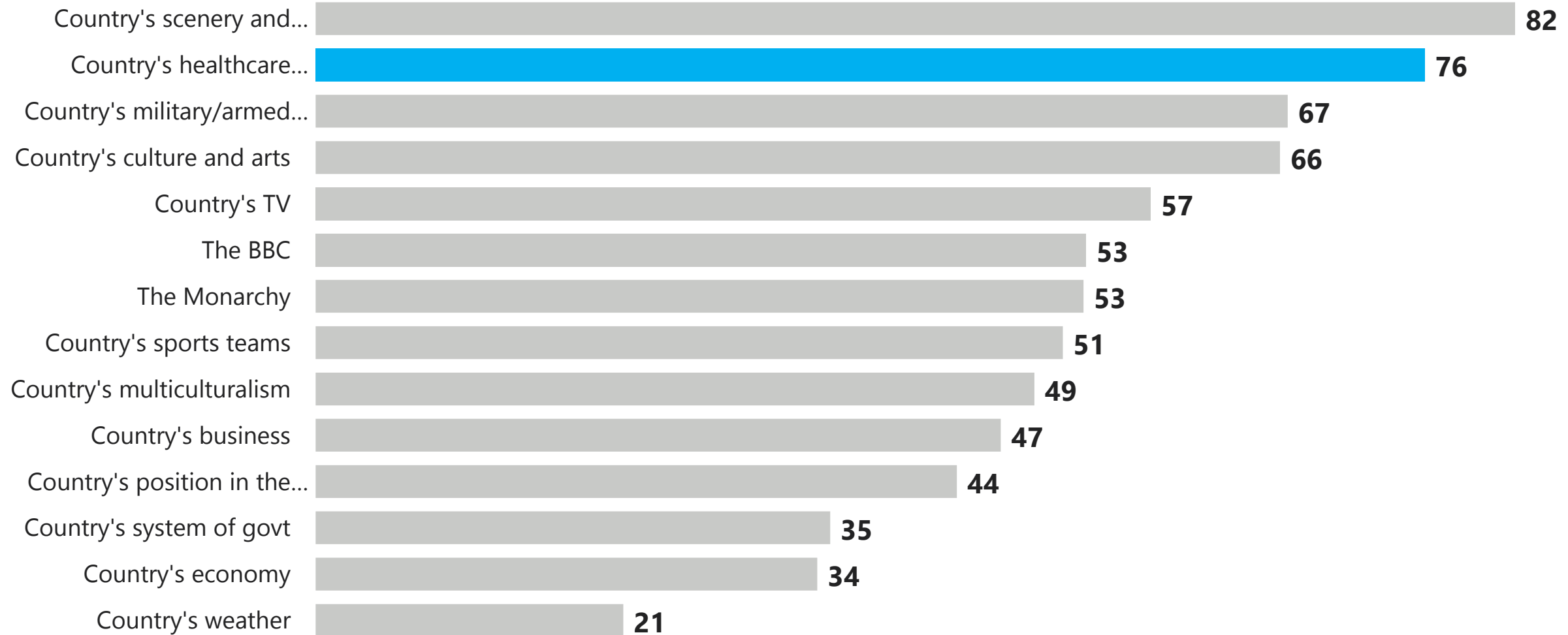


Base: 1,006 British adults 18+, 2 – 11 February 2018

Source: Ipsos MORI Issues Index

UK: A LOT OF PRIDE IN NHS

% "a great deal" / "a fair amount"



Below is a list of things that are part of life in the UK/USA/Canada/Australia/New Zealand. To what extent, if at all, do you think each of these is something that the people of the UK/USA/Canada/Australia/New Zealand should be proud of?

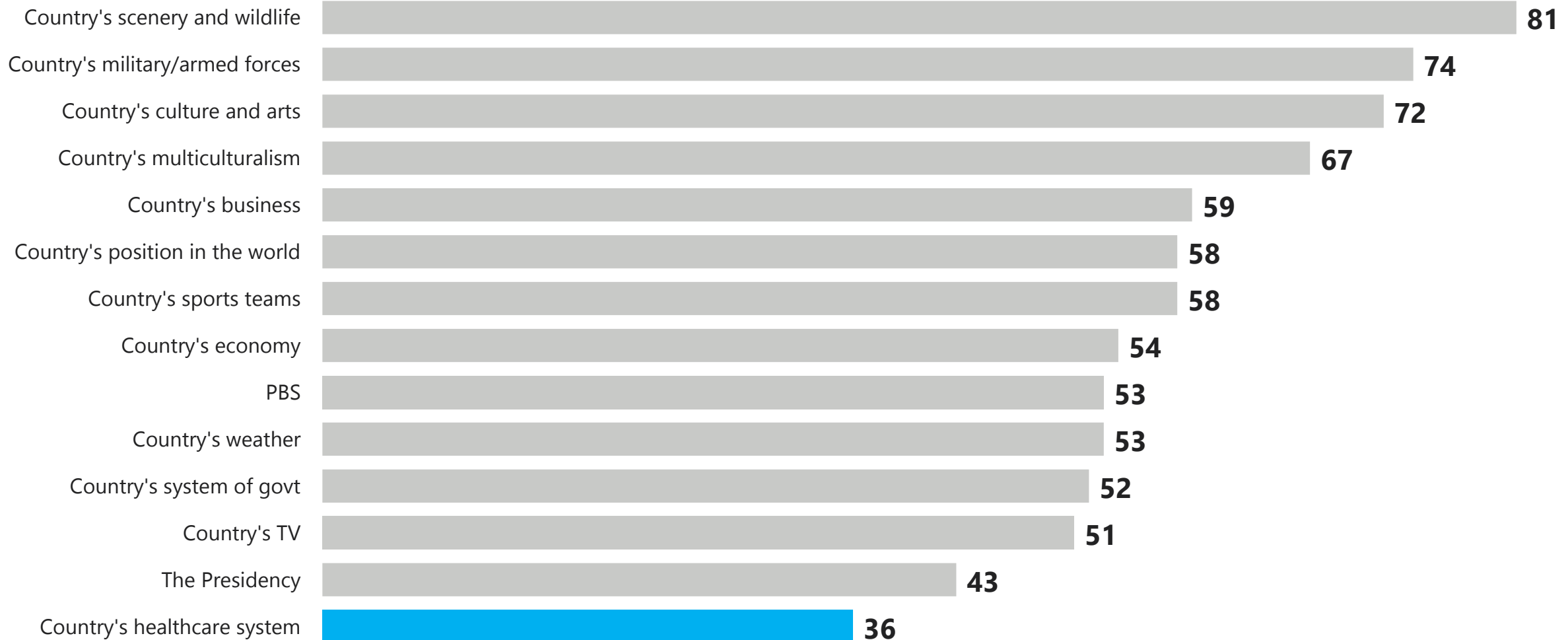
GAME CHANGERS



USA: PRIDE IN THE MILITARY.....

% "a great deal" / "a fair amount"

% "a great deal" / "a fair amount"



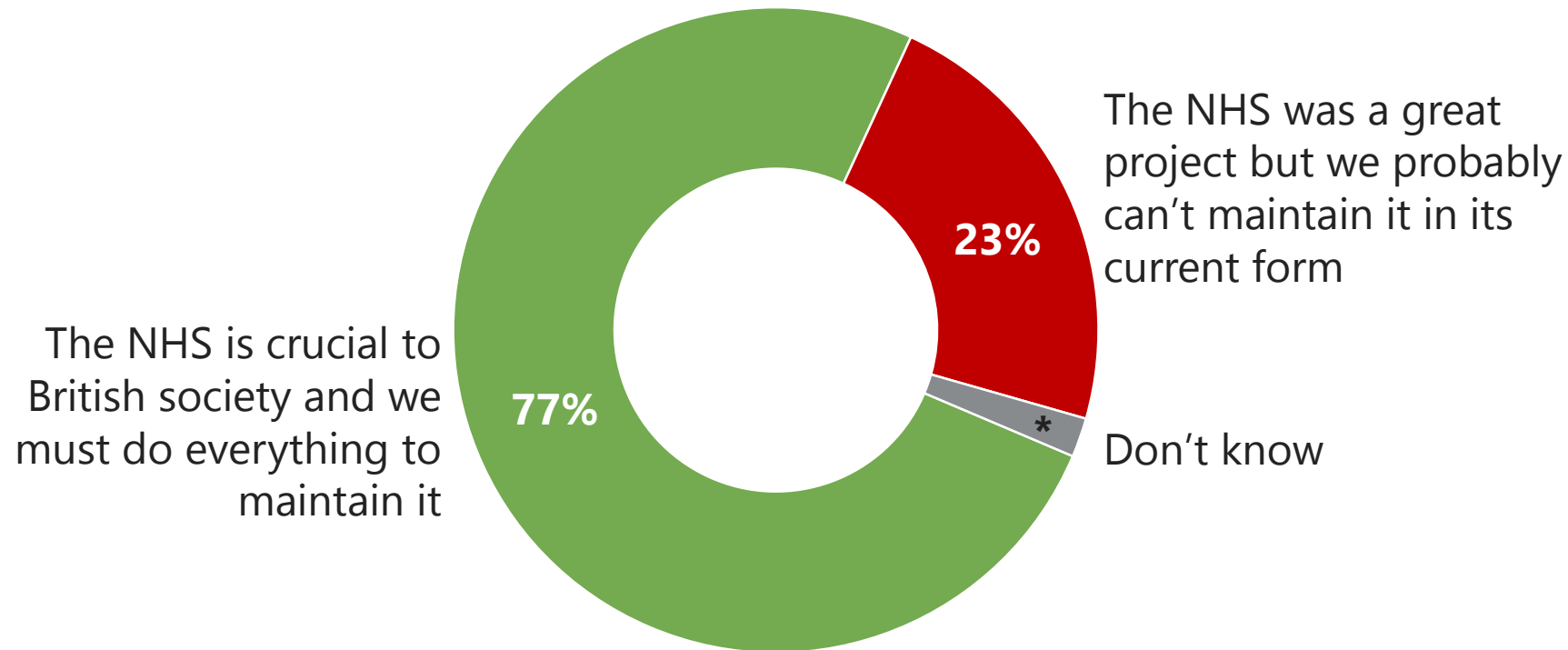
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GAME CHANGERS



Divided on Brexit, the public are united on the NHS and are keen to protect it

Which of the following statements best reflects your thinking about the NHS?



Base: 1151 English adults aged 15+, 4-10 August 2017

Source Ipsos MORI / King's Fund

Views on this have remained remarkably stable so far this century



Base: c.1,000 English adults aged 15+ per wave

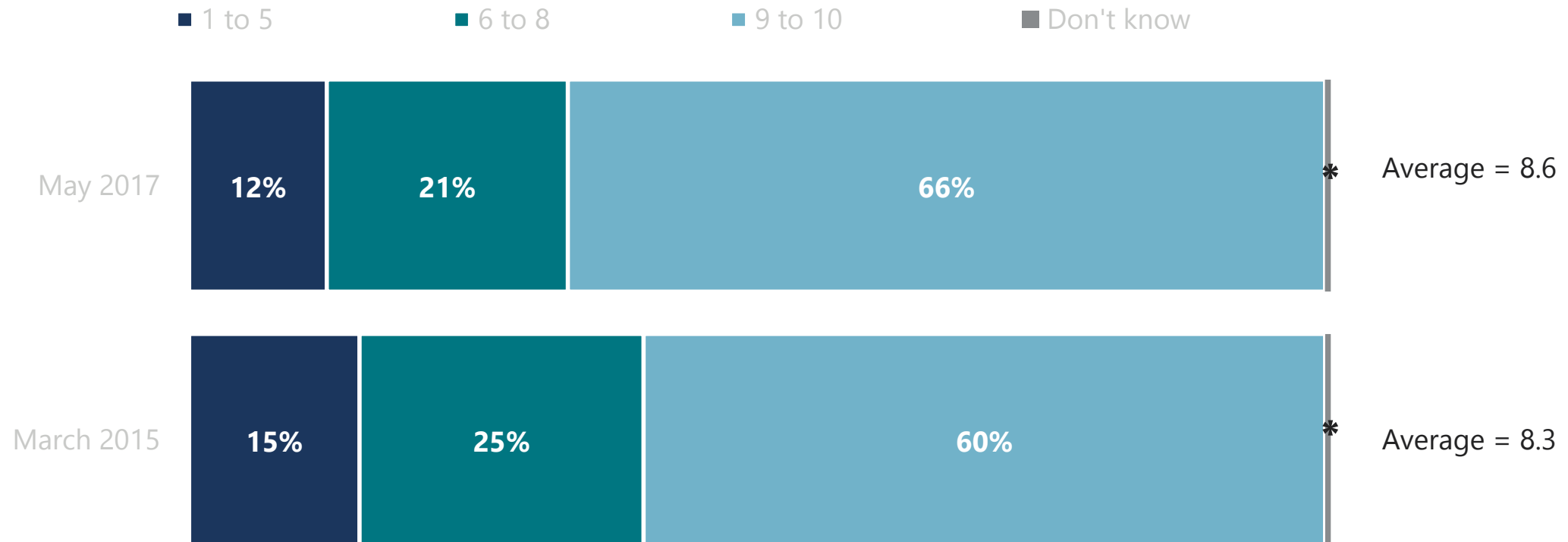
Source Ipsos MORI / DH / King's Fund

GAME CHANGERS



Most still agree strongly with the founding principles

Q: On a scale of 1 to 10, where 1 is strongly disagree and 10 is strongly agree, please say how much you disagree or agree with the following statement? The government should support a national health system that is tax funded, free at the point of use, and providing comprehensive care for all citizens.



* means less than 0.5%.

Base: 1,985 GB adults aged 15+ (interviewed between 5th-15th May 2017) and 1,792 GB adults aged 15+ (interviewed between 13th and 23rd March 2015)

Source Ipsos MORI / Health Foundation

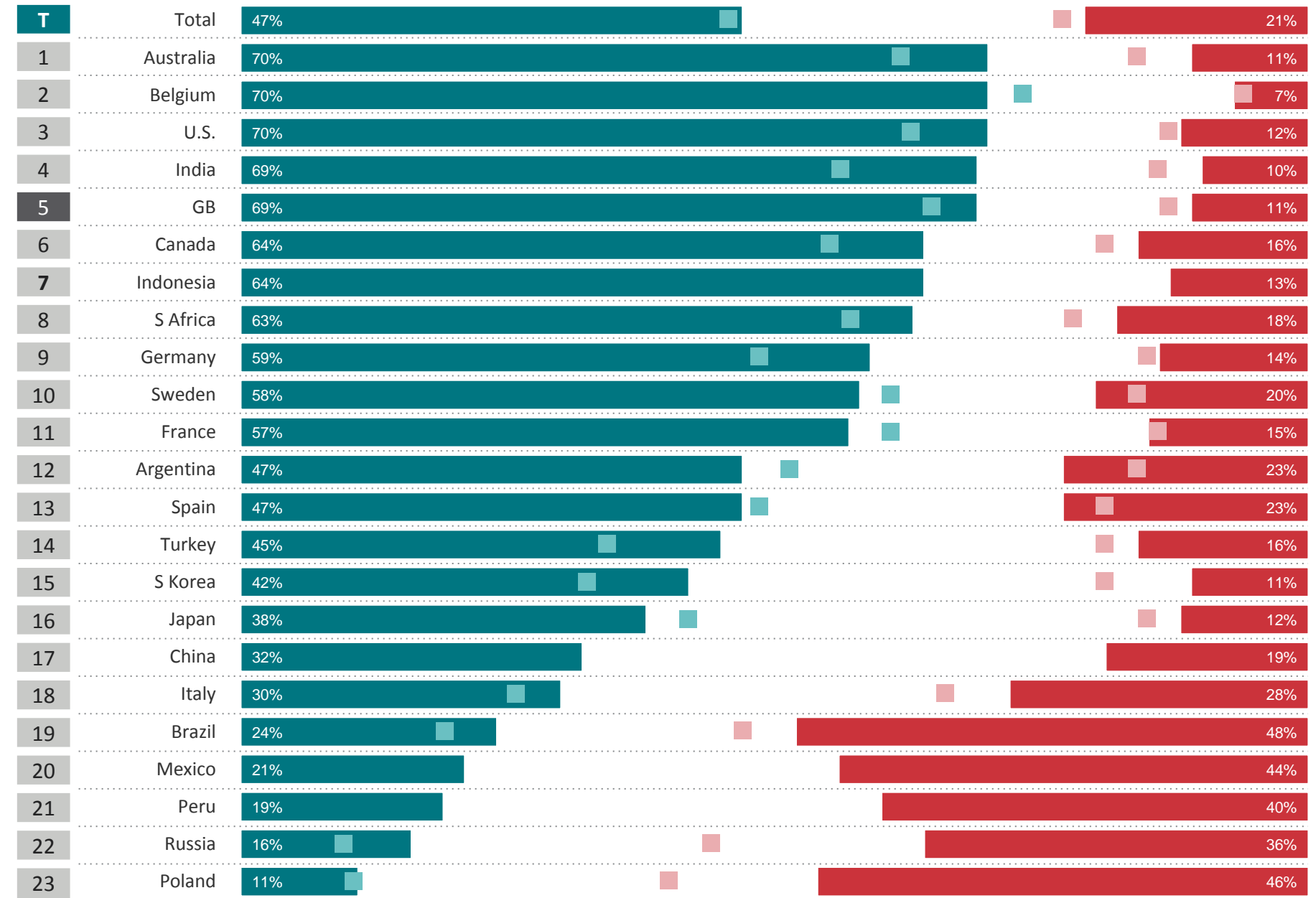
GAME CHANGERS



AMONG THE MOST POSITIVE ABOUT CURRENT CARE

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.

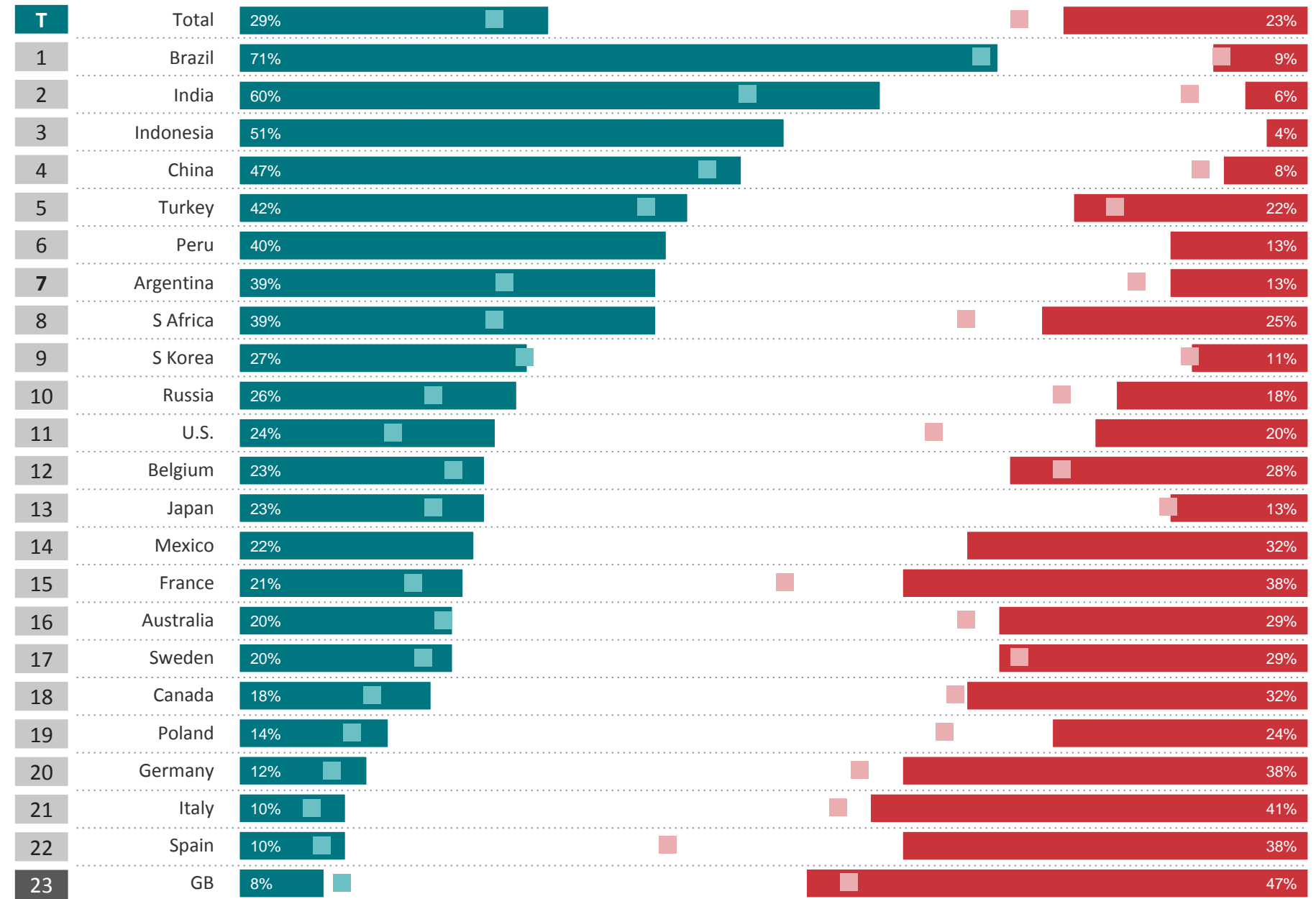
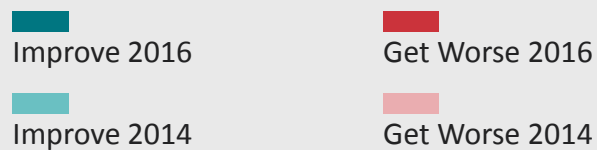


Base: 18,180 adults across 23 countries, online, 12th Sep – 11th Oct 2016

THE MOST NEGATIVE ABOUT THE FUTURE

Over the coming years, do you expect the quality of healthcare that you and your family will have access to locally will improve, stay the same or get worse?

KEY:

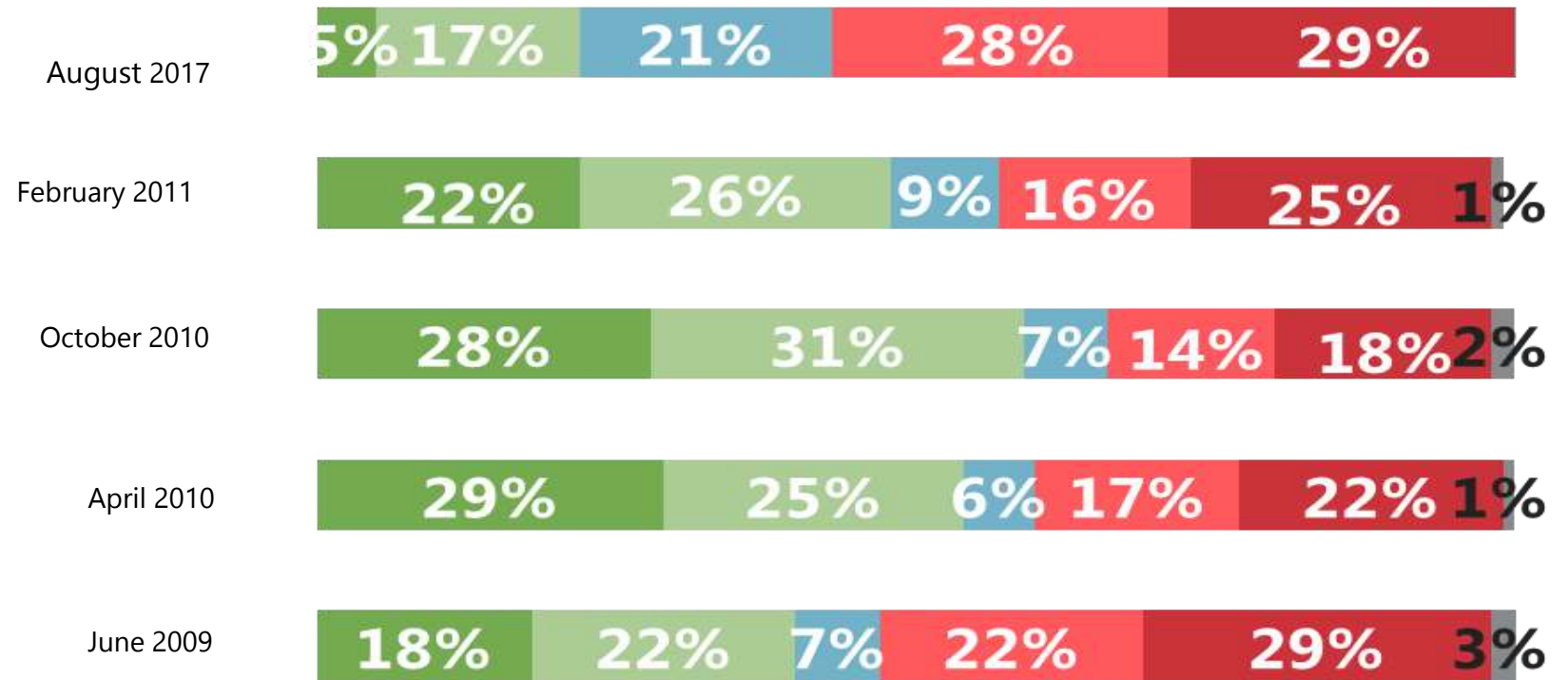


Base: 18,180 adults across 23 countries, online, 12th Sep – 11th Oct 2016

Support for cutting public service spending has halved since 2010

Q

There is a real need to cut spending on public services in order to pay off the very high national debt we now have...

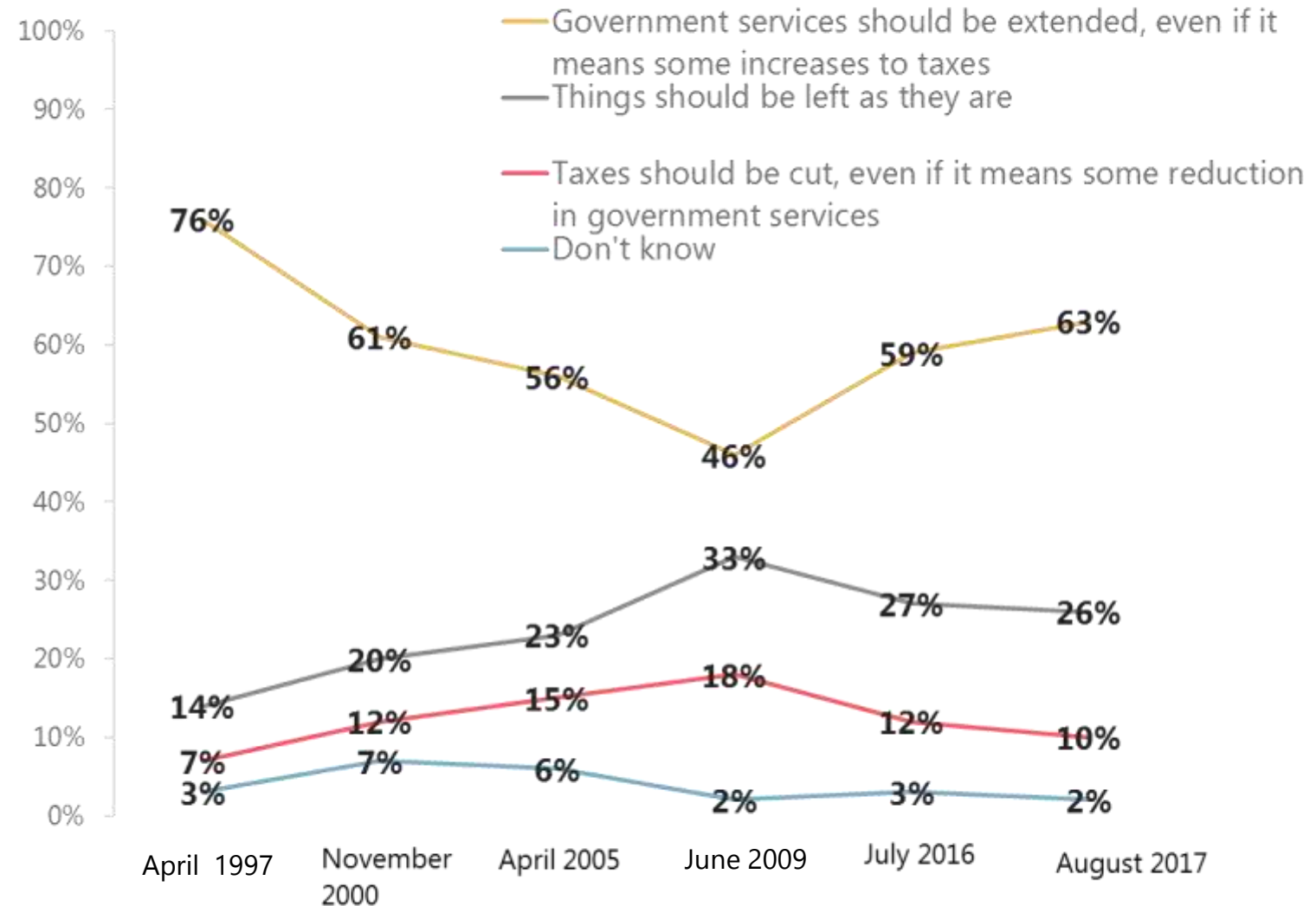


■ Strongly agree ■ Tend to agree
■ Neither agree nor disagree ■ Tend to disagree

Support for more spending and tax rises



People have different views about whether its is more important to reduce taxes or keep up government spending. How about you? Which of these statements comes closest to your own view?

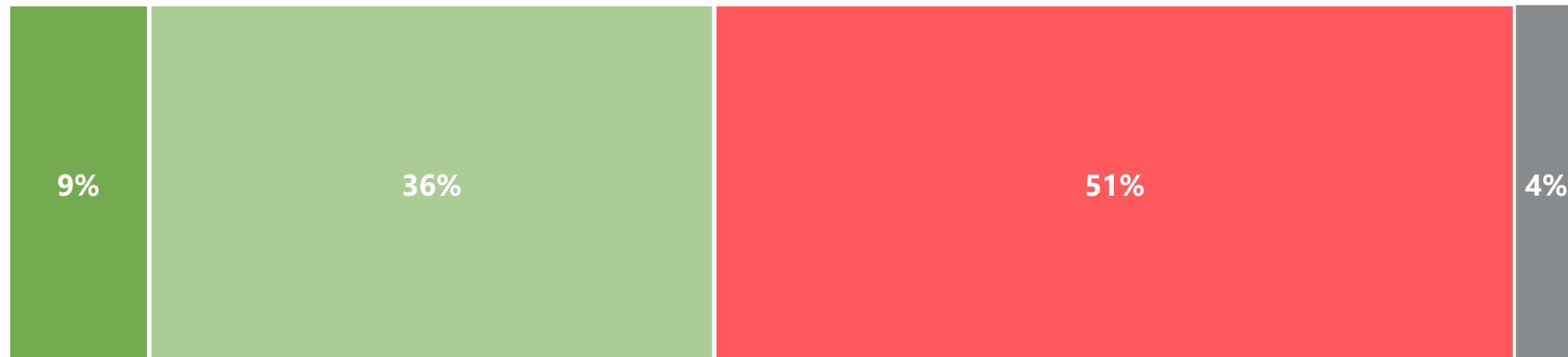


Base: c,1000 GB adults

Although around half of the public think the NHS often wastes money

Q: Thinking about the NHS as a whole, which of the following statements best reflects your views on the way the NHS uses money?

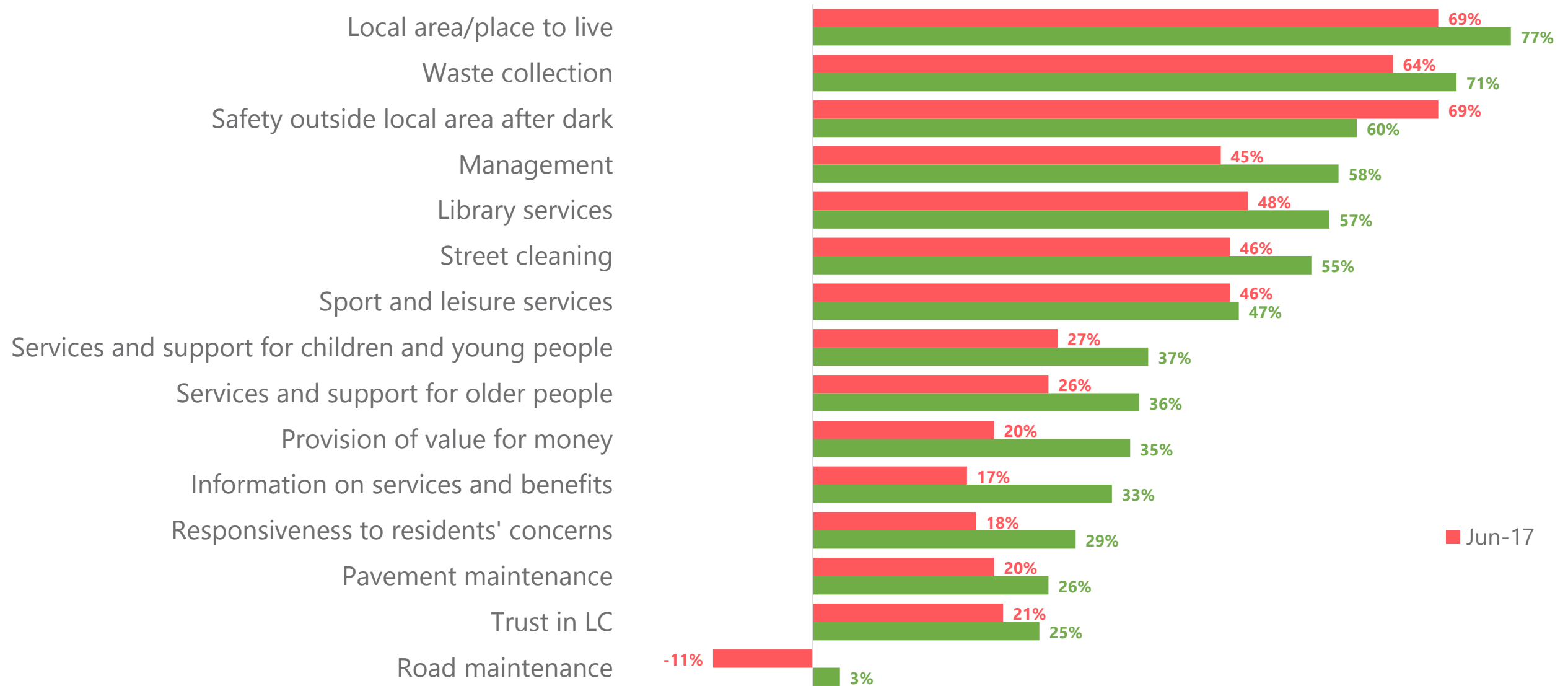
- The NHS almost never wastes money
- The NHS often wastes money
- The NHS generally doesn't waste money
- Don't know



Base: 1,944 GB adults aged 18+, interviewed between 5th-15th May 2017

Source Ipsos MORI / Health Foundation

Satisfaction with many services falling back...



Source: LGA tracker – Net satisfaction shown

LGA, August 2017

How do we prioritise?



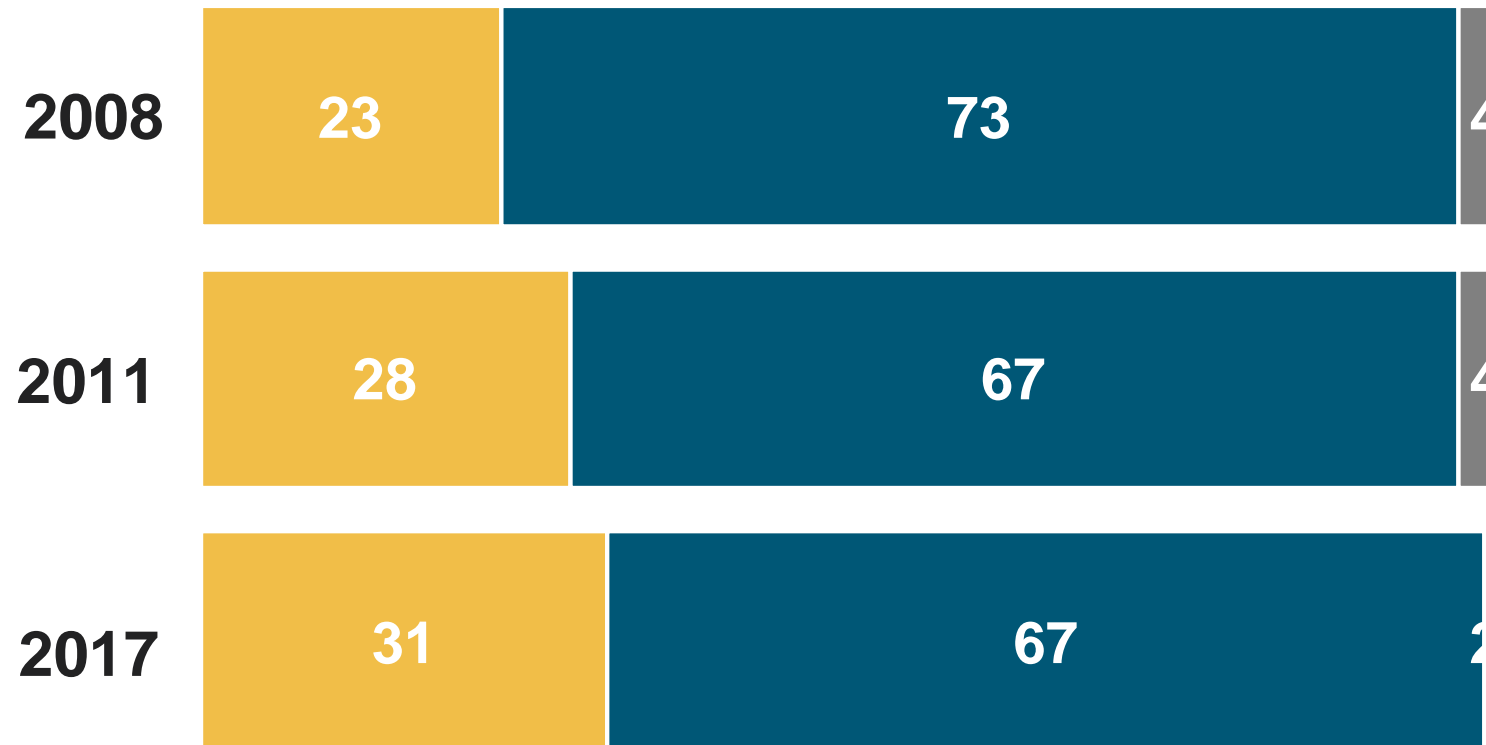
Public think treatments & services should be available to all EVERYWHERE

Thinking about the treatments and services that are available on the NHS, which of these statements most closely matches your opinion?

■ % The availability of NHS treatments and services should be based on local need rather than a 'one size fits all' approach across the country

■ % Treatments and services should only be available on the NHS if they are available to everyone and not dependent on where you live

■ % Don't know

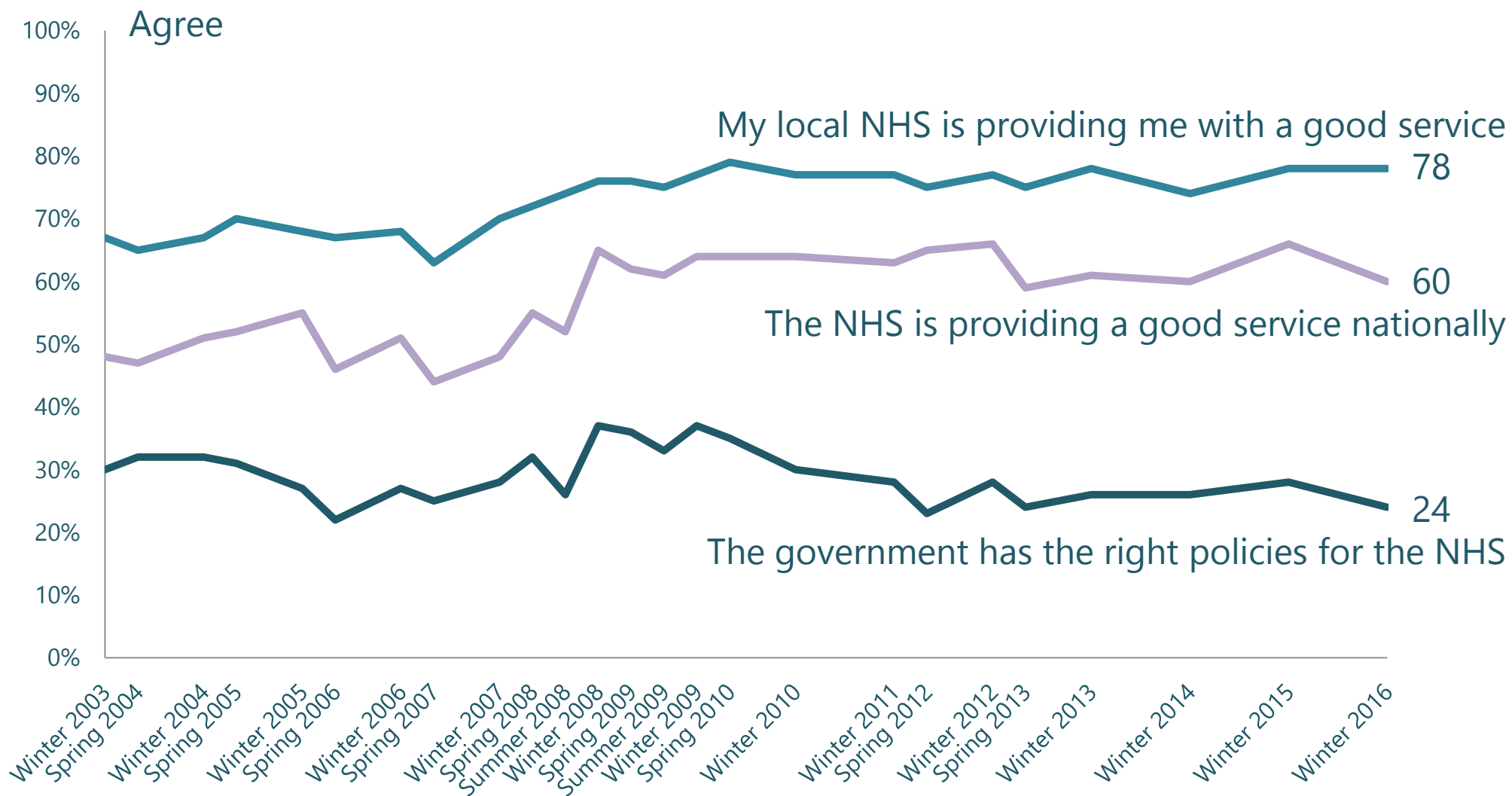


**The NHS is a stronger brand
than government**



While satisfaction with NHS services are high, government

policies are viewed less well



Base: Adults aged 16+ in England (c. 1000 per wave)

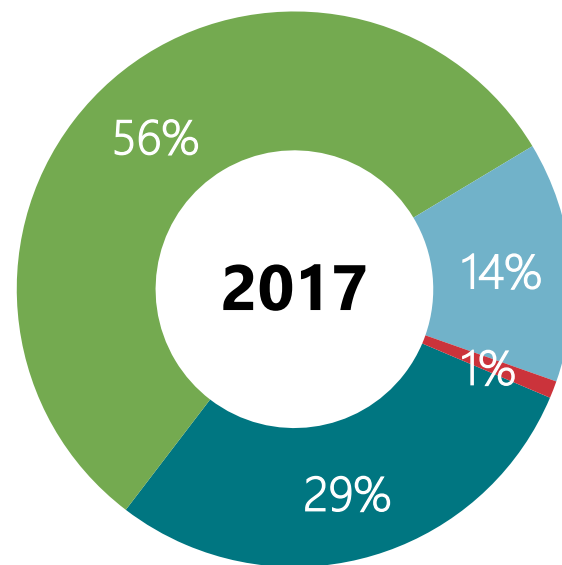
Source: Ipsos MORI/Department of Health Perceptions of the NHS Tracker

The public want to be consulted on change

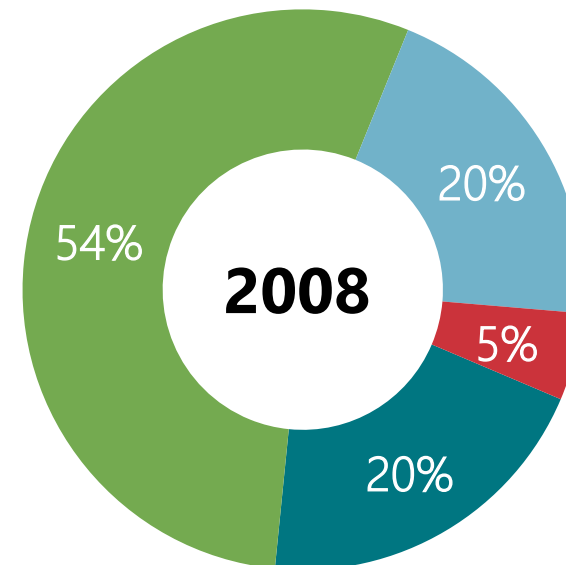
The public think they should be consulted on the NHS...but

And thinking of how decisions about treatments and services should be made, which of these statements most closely matches your opinion?

- Decisions about which NHS treatments and services are available should be made solely by qualified health professionals and not the general public
- The public should be consulted on decisions shaping which NHS treatments and services should be available but the final decisions should be made by qualified health professionals
- The general public should be much more actively involved in shaping which NHS treatments and services are available, e.g. deciding local priorities and allocating budgets
- Don't know



Base 2017 1151 English adults ages 15+, 4-10 August 2017
Base 2008: 988 English adults aged 18+ November 2008

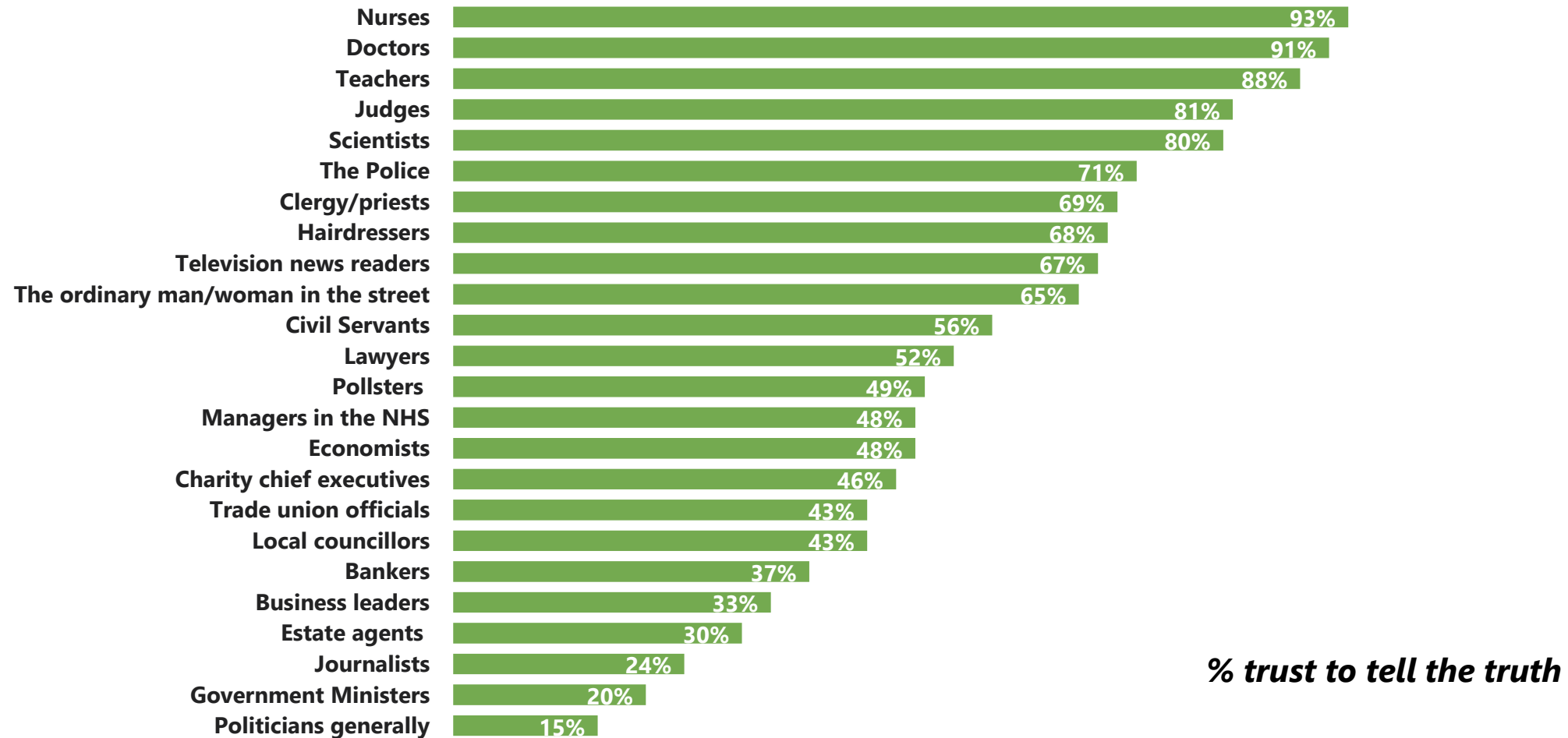


Source Ipsos MORI / King's Fund
Source: Ipsos MORI / Social Market Foundation

**The public trust health
professionals more so than NHS
managers or politicians**

Nurses and doctors are the most trusted professions

“Now I will read you a list of different types of people. For each would you tell me if you generally trust them to tell the truth, or not?”

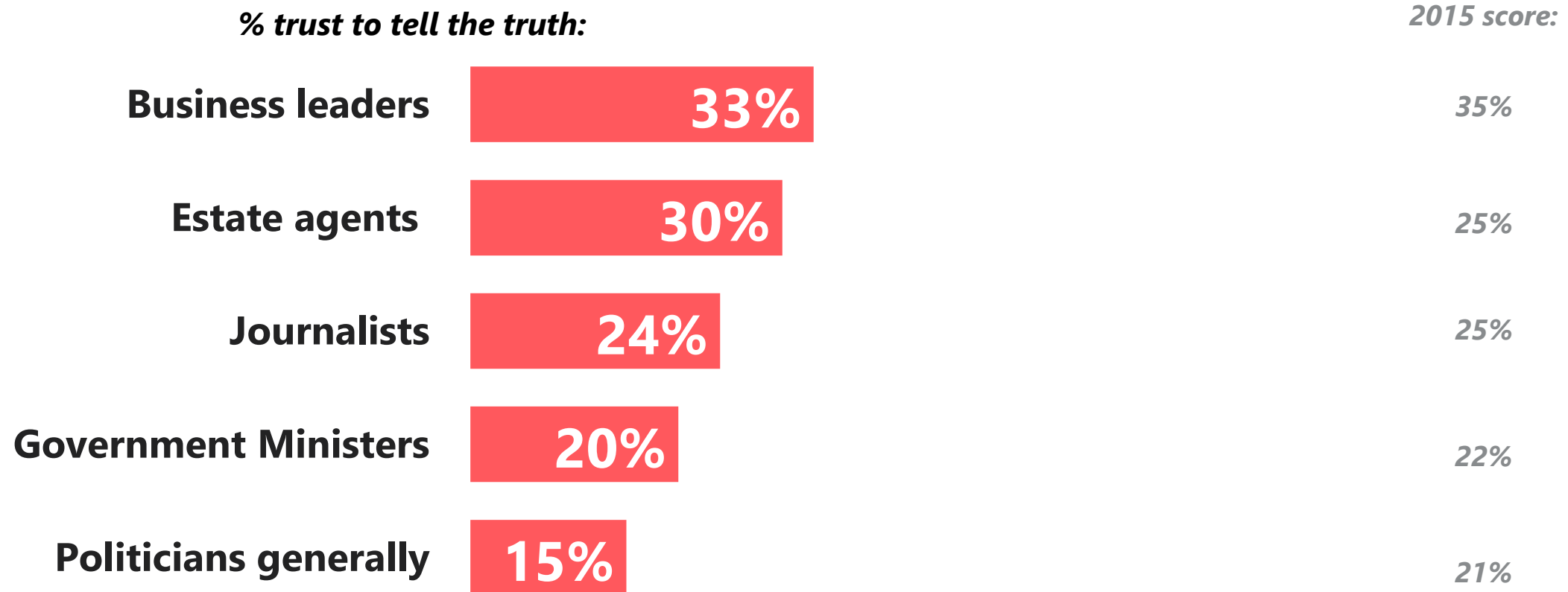


Base: 1,019 British adults aged 15+, fieldwork 14th October – 1st November 2016



Ipsos MORI
Social Research Institute

Government ministers and politicians least trusted



Base: 1,019 British adults aged 15+, fieldwork 14th October – 1st November 2016

What about our data??



TECHNOLOGY AND HEALTH.....



PROLIFERATION OF TECHNOLOGY AND INNOVATIONS



CONSUMERIZATION OF HEALTH



POSITIVE TRENDS IN POLICY (TELEHEALTH)



PERSONALISATION OF HEALTH



AGING POPULATION



DIGITAL THERAPEUTICS



PROVIDER/HEALTH SYSTEMS PREPAREDNESS



WEARABLES FOR FITNESS/WELLNESS



Ipsos Healthcare

Seven core principles to guide technology companies as they work with the NHS...



Transparency

Be open about project lifecycles and be clear about how data is being used



Safety and security

Prioritise data security – ensure highest level accountability



Collaboration

Collaborate with NHS staff and patients



Solve the right problems

Start from what the NHS needs – not what looks good



Create measurable impact

In terms of care for individual patients as well as NHS staff and systems as a whole

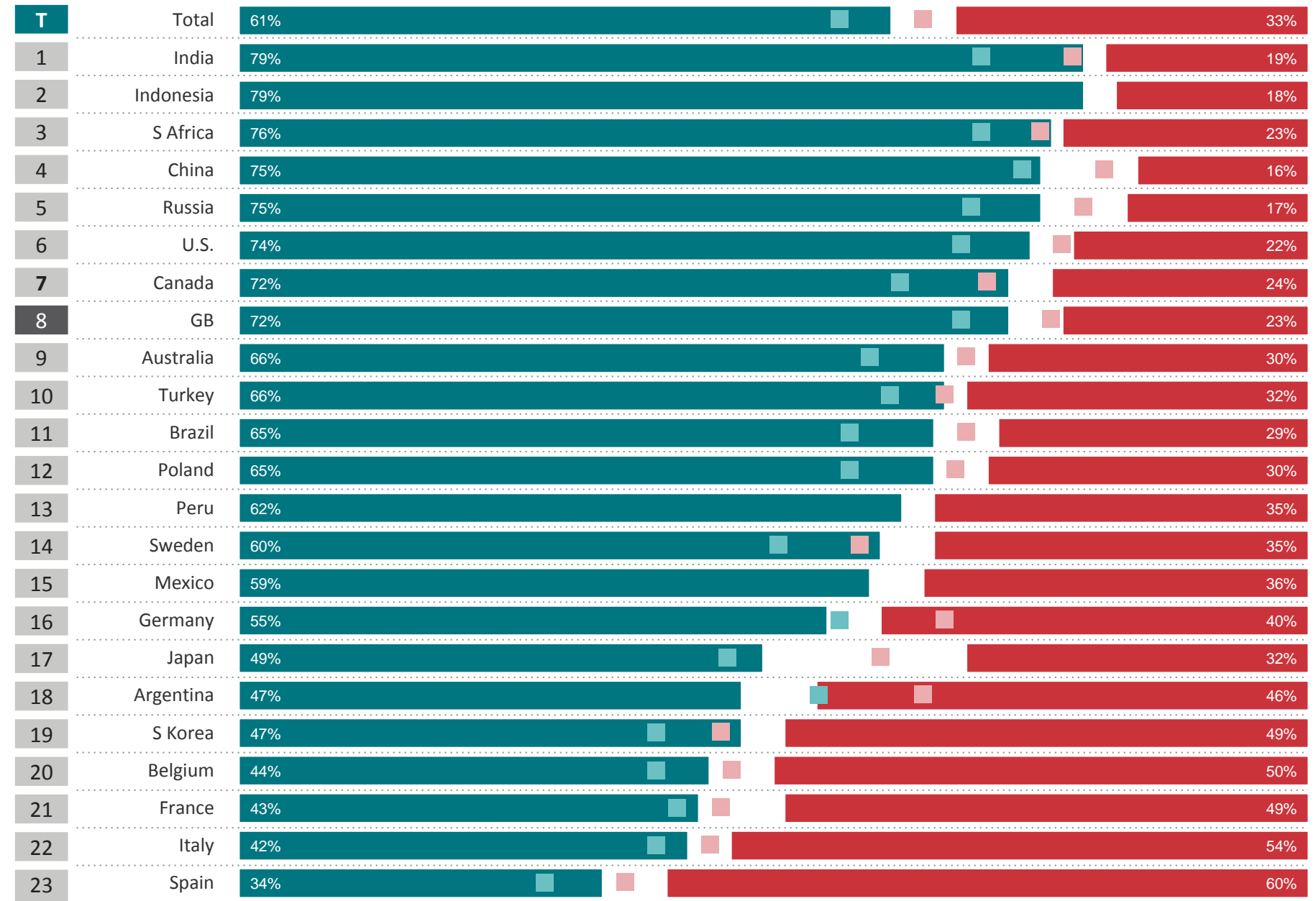
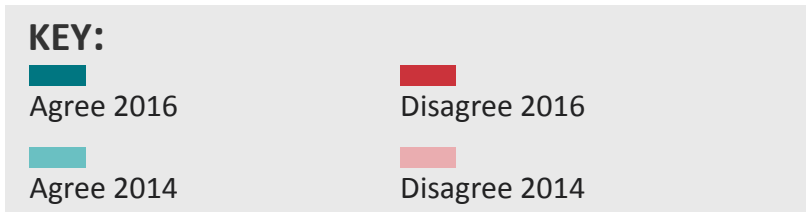


Work towards social good

Reduce health inequalities and create progressive outcomes for healthcare

DEFERENCE IS DYING THANKS TO THE WEB

I always try and find out information on healthcare by myself, rather than just relying on what my doctor tells me

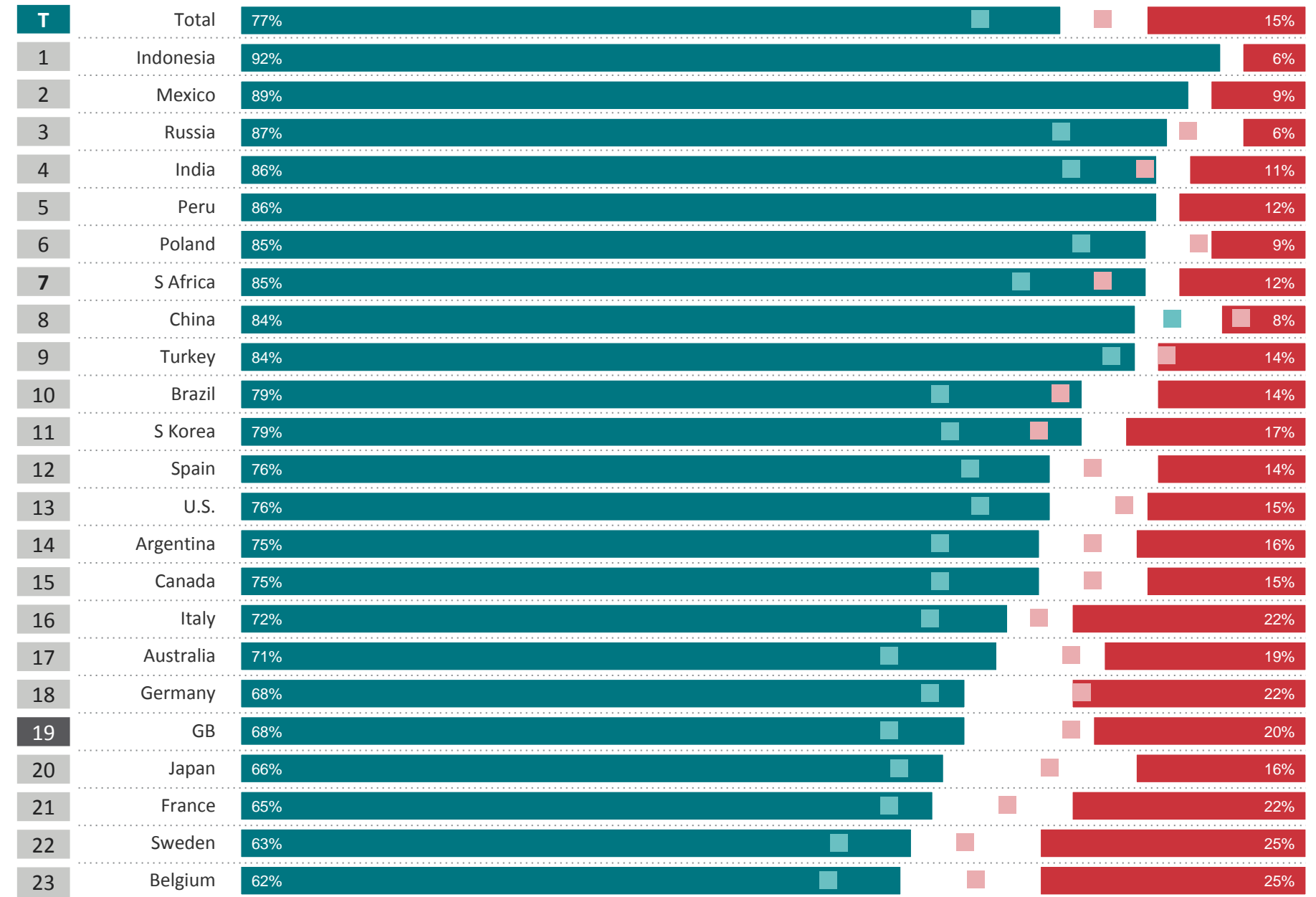
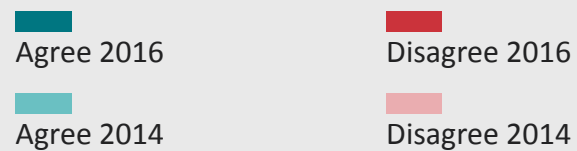


Base: 18,180 adults across 23 countries, online, 12th Sep – 11th Oct 2016

WANT MORE CONTROL

I would like more control over decisions about my health

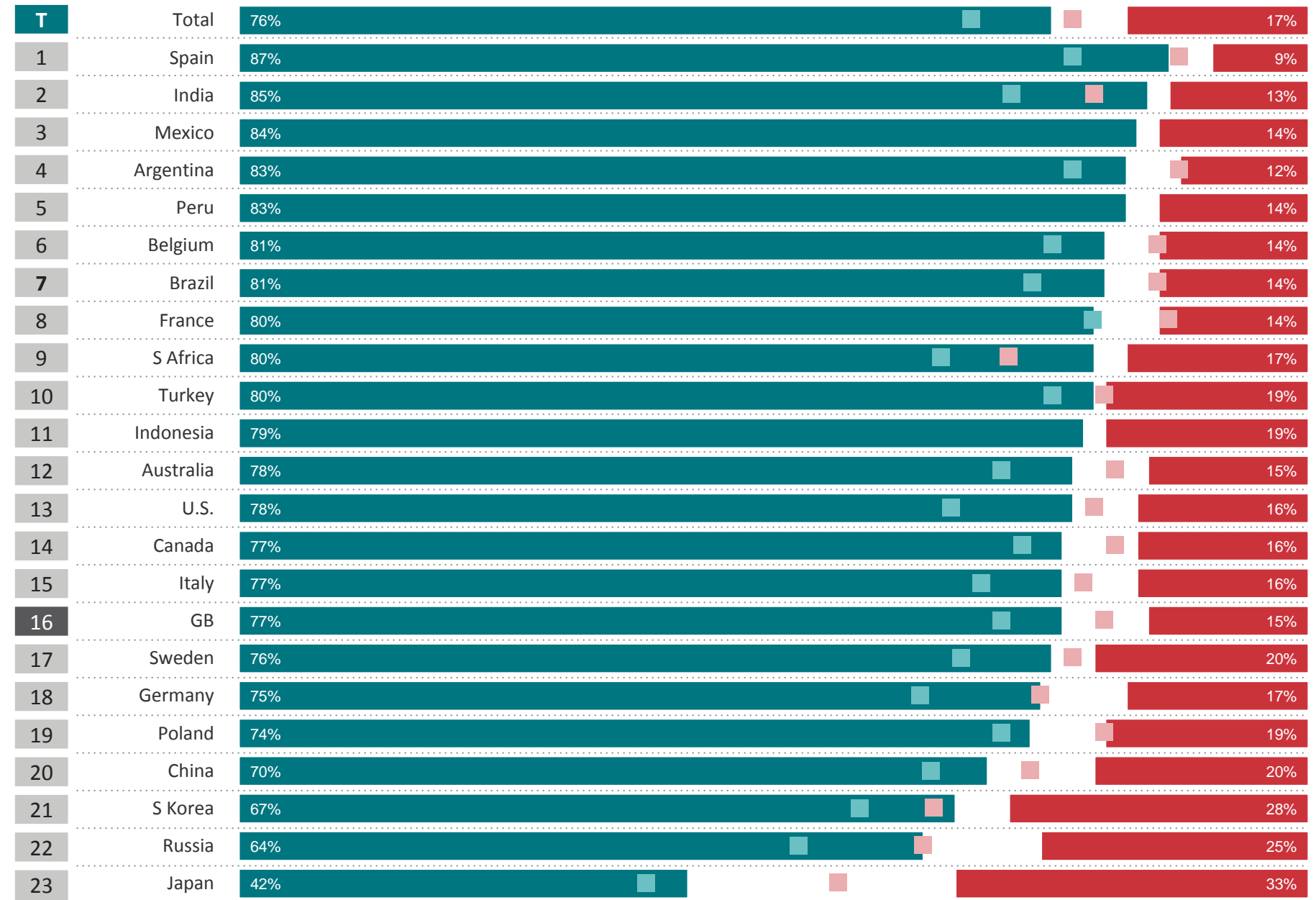
KEY:



Base: 18,180 adults across 23 countries, online, 12th Sep – 11th Oct 2016

BUT STILL TRUST DOCTORS

It is always best to follow the doctor's advice



Base: 18,180 adults across 23 countries, online, 12th Sep – 11th Oct 2016

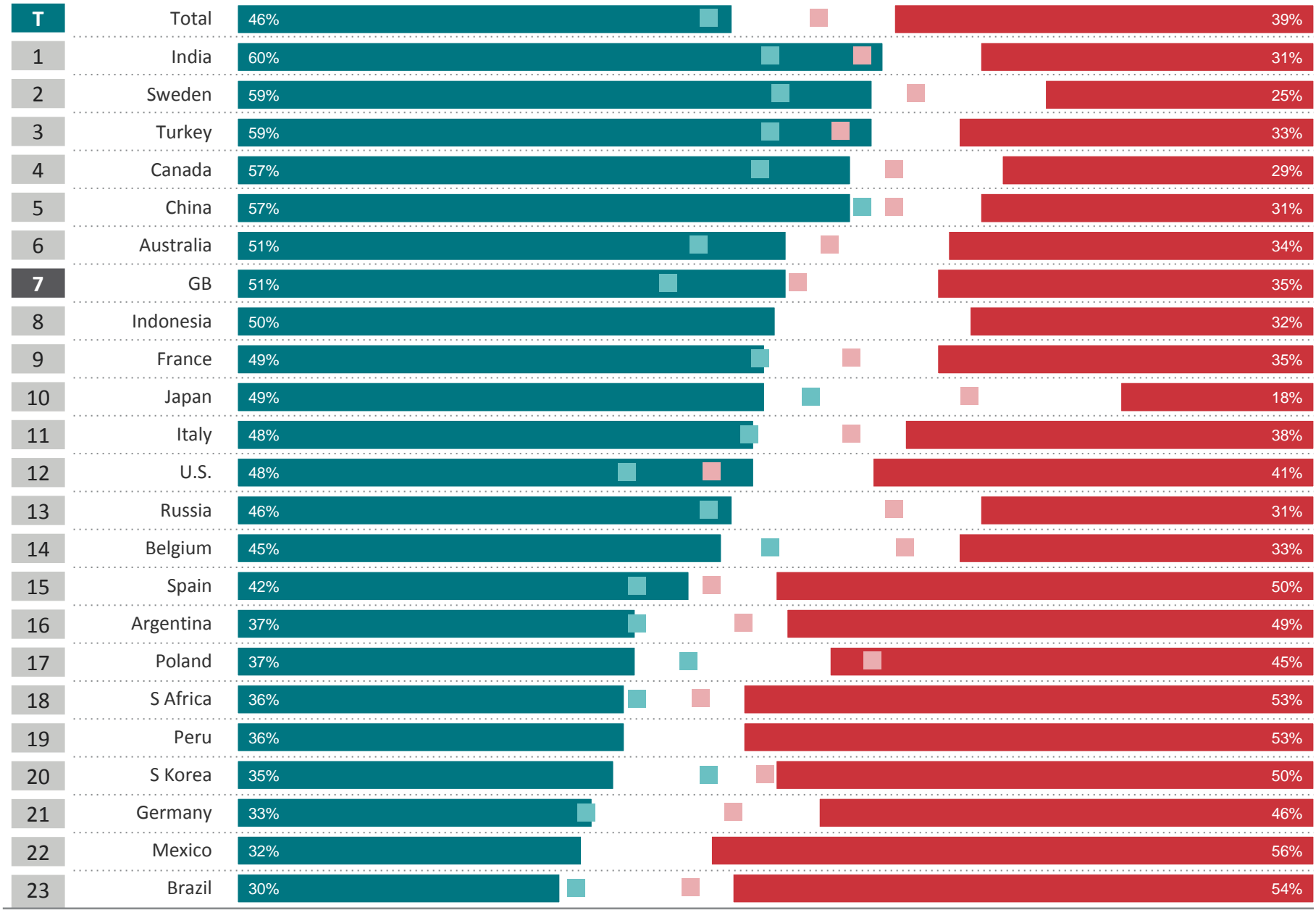
KEY:
■ Agree 2016
■ Disagree 2016
■ Agree 2014
■ Disagree 2014

SOME CONCERNS ABOUT HOW DATA IS USED

% Who trust public sector healthcare providers with their data

KEY:

- Trusted 2016
- Not Trusted 2016
- Trusted 2014
- Not Trusted 2014



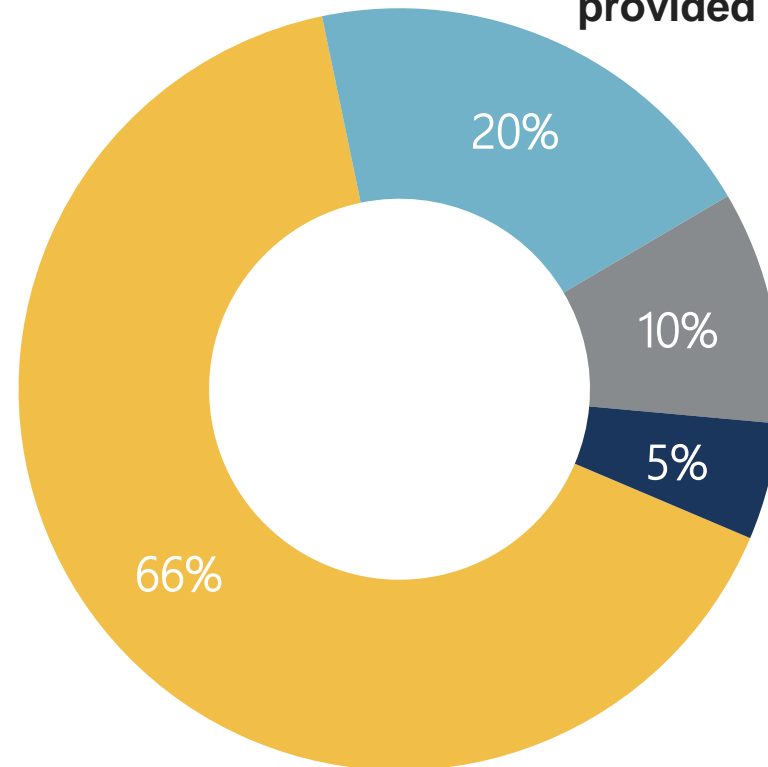
Base: 18,180 adults across 23 countries, online, 12th Sep – 11th Oct 2016

What about the money??



How to fund the NHS?

I would be willing to pay more taxes in order to maintain the level of spending needed to keep the current level of care and services provided by the NHS



Reduce spending on other services such as education and welfare in order to maintain the level of spending needed to keep the current level of care and services provided by the NHS

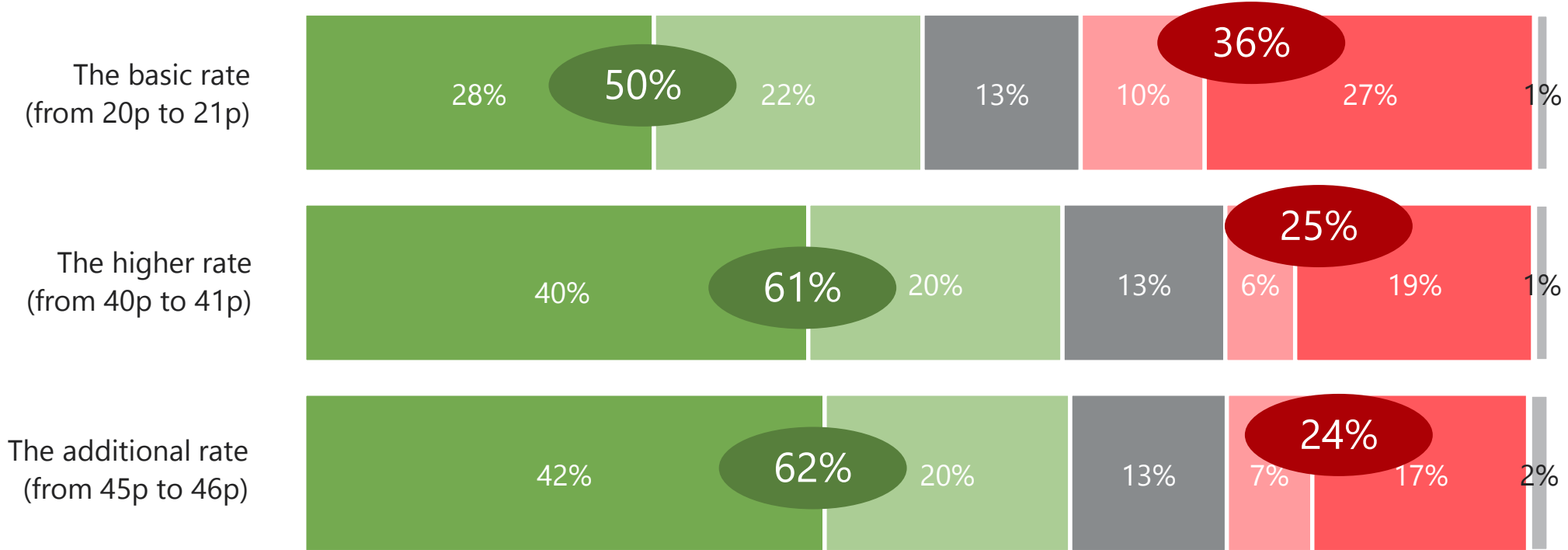
Reduce the level of care and services provided by the NHS so that you do not need to increase the current level of taxation and spending on the NHS

None

Make the wealthiest pay more

Q: In order to increase the amount of funding available to the NHS, to what extent would you support or oppose increasing each rate of income tax by one pence in every pound for all who pay income tax?

■ Strongly support ■ Tend to support ■ Neither support nor oppose ■ Tend to oppose ■ Strongly oppose ■ Don't know



Base: 1033 adults aged 18+ in the UK, 26 – 29 January 2017

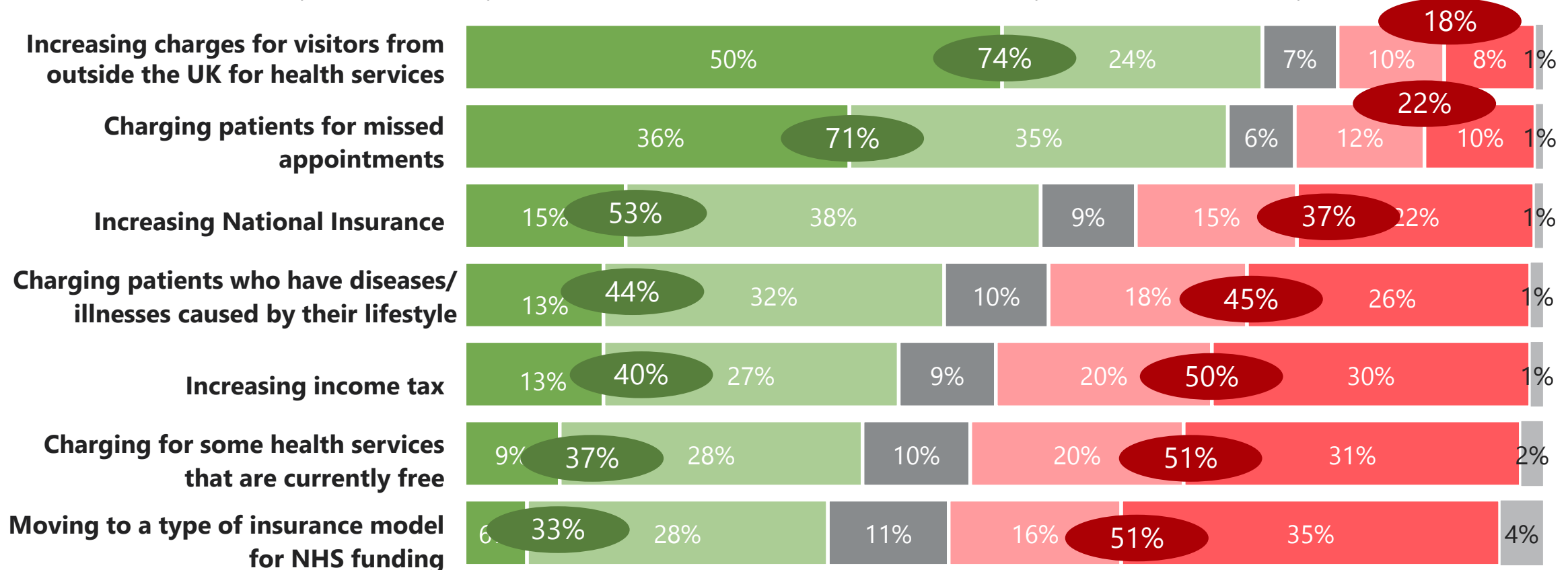
Source: Ipsos MORI/BBC News

Charges for overseas visitors and patients missing

appointments favoured as ways of increasing funding

Q: To maintain the current level of care and services provided by the NHS, funding for the NHS would have to increase. I am now going to read out some suggestions people have made about how funding could increase. With that in mind, how acceptable or unacceptable do you feel each of the following measures would be...?

■ Completely acceptable
 ■ Fairly acceptable
 ■ Neither acceptable nor unacceptable
 ■ Fairly unacceptable
 ■ Completely unacceptable
 ■ Don't know

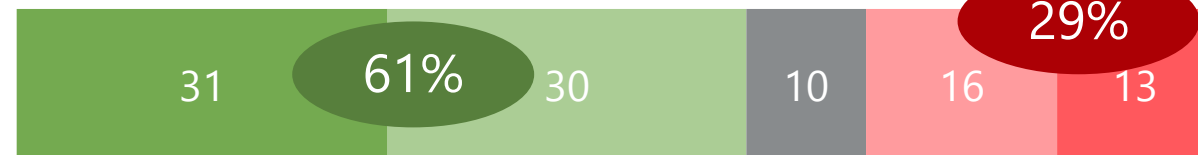


Fines for missed appointments are more popular than charges for visiting GPs

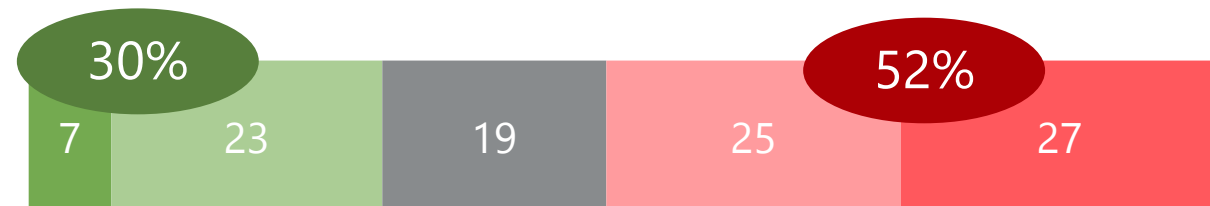
Q: To what extent do you support or oppose each of the following as a way of securing additional funding to maintain the NHS...?

■ % Strongly support ■ % Tend to support ■ % Neither/nor ■ % Tend to oppose ■ % Strongly oppose ■ % Don't know

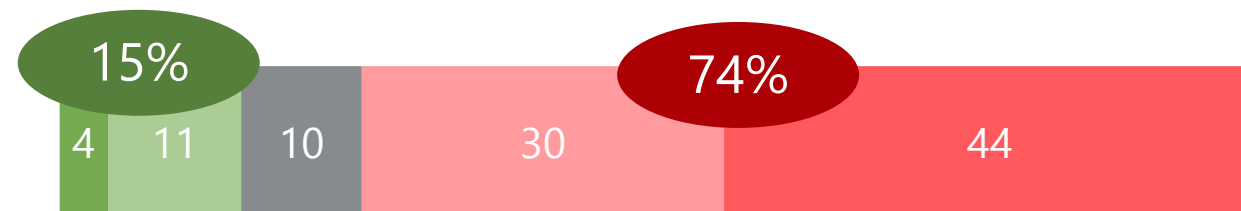
...a £10 fine for missed appointments (e.g. GP, hospital appointments)



...increasing prescription charges to £10 (the current prescription charge is £8.05)



...being charged a £10 fee to visit a GP

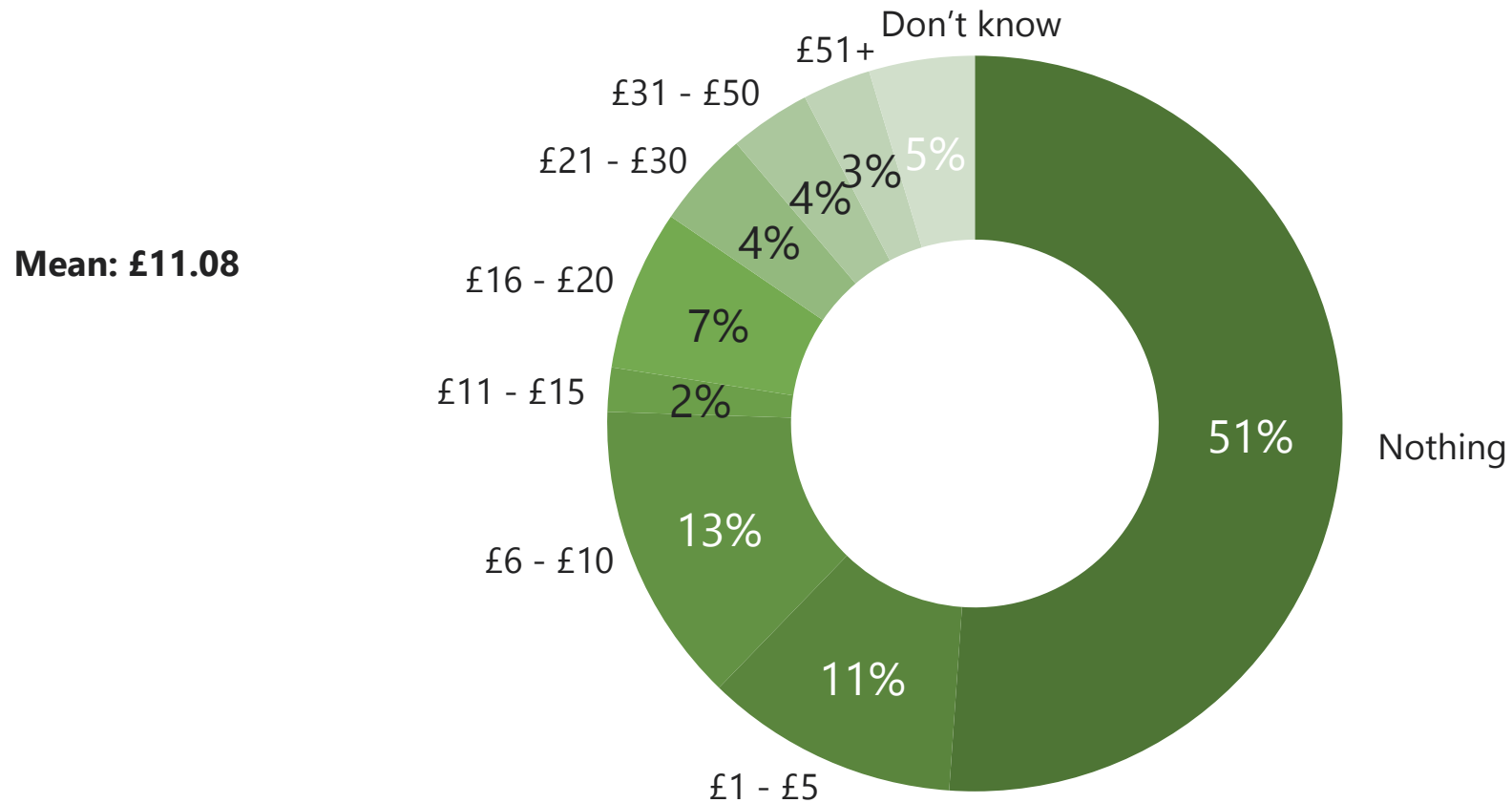


Base: 1792 adults aged 15+ in Great Britain, 13 – 29 March 2015

Source: Ipsos MORI / Health Foundation

Around half would NOT be willing to pay in order to guarantee a GP appointment

Q: Imagine now that you were experiencing symptoms of a health condition and you decided that you need to see your GP within the next 24 hours. How much, if anything, would you be willing to pay in order to be guaranteed an appointment with your GP within the next 24 hours?



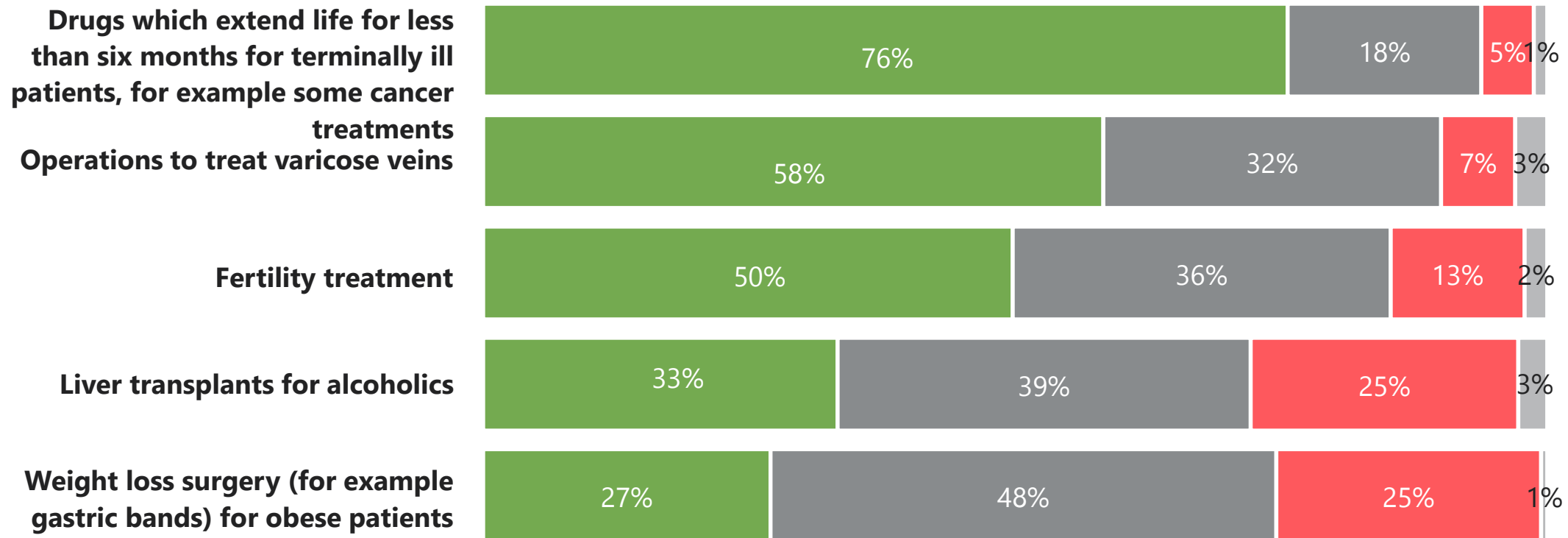
Base: 1033 adults aged 18+ in the UK, 26 – 29 January 2017

Source: Ipsos MORI/BBC News

There is support for rationing some services

Q: The following treatments I will read out are generally available for free on the NHS in the United Kingdom. For each, please state whether you think it should: be available for free to everybody who needs it, be available for free only for some people who need it, or no longer be available for free for anybody who needs it...?

- Should be available for free to everybody who needs it
- Should be available for free only for some people who need it
- Should not be available for free for anybody who needs it
- Don't know



Base: 1033 adults aged 18+ in the UK, 26 – 29 January 2017

Source: Ipsos MORI/BBC News

**Intersection of what is
changing and what is fixed –
we don't yet know how this
will play out**



**But many of the same
things still unite us**



**Traditional British
institutions and culture
are more resilient than
we think**

**The NHS will survive -
and maybe thrive!**



Thank you!

ben.page@ipsos.com



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