



2018 International Health Security Poll

Initial Results and Analysis

Introduction

As the Global Health Security Agenda approaches its fifth anniversary and first renewal in 2019, a distinct knowledge gap has emerged; patient perspectives on obtaining medication and care, preparedness, and health security are largely unmeasured and overlooked in country-level assessments. Healthcare Ready hypothesized that examining patient perspectives on health security issues would yield significant insights that could not be obtained through other research avenues, and which could be integrated into existing data to provide a clearer and more granular picture of health security in the countries studied. While there are many other approaches, a multi-country poll was selected as a method of collecting this information across a number of countries in regions within the same timeframe.

In April 2018, Healthcare Ready conducted an international poll in 13 countries (Canada, the United States, Mexico, Brazil, the United Kingdom, France, Germany, Uganda, South Africa, India, Vietnam, Indonesia, and Malaysia) examining patient¹ perceptions in health security, disaster risks, and preparedness behaviors across the populations (executed by YouGov). All results are weighted and representative of their respective country populations. Additional analysis of the results is underway and will be shared in the coming months.

Executive Summary

Healthcare Ready has gained valuable insights in the initial analysis of the data collected from a sample of individuals across the globe. While the countries in the poll do not necessarily constitute a globally representative sample, they do represent a wide diversity of geographic regions, income and development levels, and cultural viewpoints. Key questions asked patients about their ability to obtain medication and their perception of risk.

Overall, we observe a majority of people are satisfied in their ability to obtain the medications they need in normal times or during disasters. However, people are less confident in their ability during disasters, and there is a significant risk to the population if their ability to obtain medication is compromised for almost any length of time during or after a disaster. In addition, of the disasters of greatest concern, results show that, overall, people are more concerned about natural disasters than terrorism.

While the initial analysis has yielded significant observations that can add to the global health security landscape, Healthcare Ready anticipates a deeper analysis of regional and demographic data within and across countries in the poll, in addition to bringing in systems-level data from other datasets, will

¹ In this study, “patient” is synonymous with respondent, and does not mean that the respondent is or is not ill or hurt.



result in even richer and more granular data that can be integrated into the global health security knowledge landscape. With future analysis, we aim to narrow the knowledge gap on patient perception and help drive the policy-making process in the domestic and international health security fields, in order to improve disaster preparedness and response.

Key Findings

- Nearly 70% of patients globally are satisfied with their ability to obtain their life-sustaining medications.
 - Nearly 70% of patients reported that they are likely to seek a flu vaccine for themselves or a loved one.
 - More than 70% of patients reported that they would go to a doctor if they suspected they or a loved one had the flu.
- Approximately 60% of patients are confident in their ability to obtain necessary medications during a natural disaster or disease outbreak.
- 42% of the respondents (across all countries) believe that the national or local government is most responsible for ensuring the availability of medications that may be needed during a personal medical emergency over any other entity.
- People are, on average, as concerned about a natural disaster as they are of political or civil unrest.
 - **24.1% of all respondents ranked political or civil unrest** as the disaster of greatest concern to their country.
 - **23.3% of all respondents ranked natural disasters** as the disaster of greatest concern to their country.
 - **18.7% of all respondents ranked disease outbreaks** as the disaster of greatest concern to their country.
 - There was a broad range of concern about disease outbreaks. The highest level of concern reported was 35.8% (Brazil), and the lowest level reported was 7.8% (the United States).



Obtaining Medication, Vaccines, and Healthcare

Patients were asked about their ability to obtain medication during normal times and during an emergency such as a natural disaster or a disease outbreak. Overall, patients are satisfied with their ability to obtain the medicines they need to stay healthy.

- On average, 69.4% percent of the population surveyed is satisfied with their ability to obtain the medicines they need during normal times. An average of 9.4% are dissatisfied with their ability to obtain the medicines they need (see *Fig. 1*).
- In contrast, 60.1% were confident in their ability to obtain the medicines they may need during a natural disaster or disease outbreak. **An average of 39.9% were not confident in their ability to obtain the medicines they may need during a natural disaster or disease outbreak.**

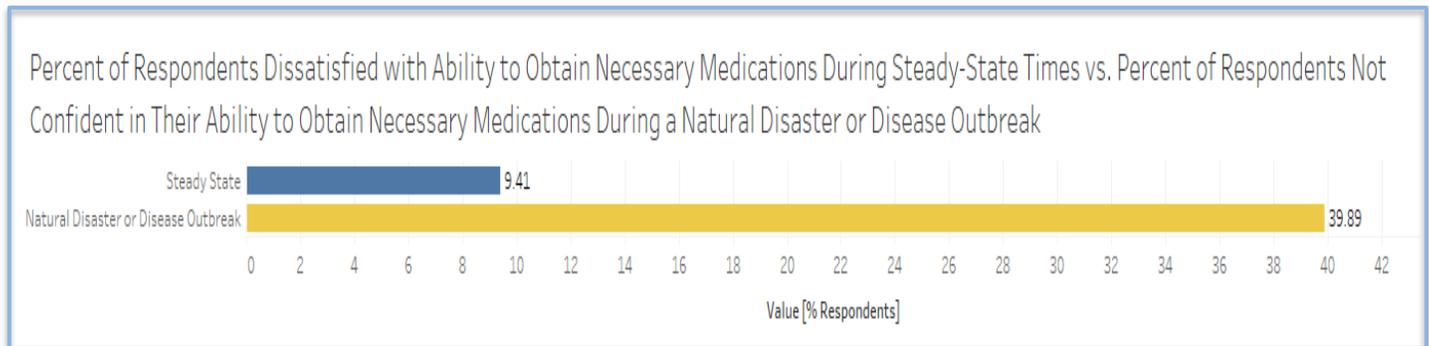


Figure 1 Overall Level of Patients Dissatisfied in Ability to Obtain Medication During Steady-State (normal times) vs. Overall Ability of Patients Not Confident in Ability to Obtain Medication During Disasters



Patients were asked whether they were likely to seek a flu vaccine for themselves or a loved one, and whether they were likely to go to the doctor if they suspected they or a loved one had the flu. Over two-thirds of respondents are likely to seek a flu vaccine for themselves or a loved one, and nearly three-quarters of respondents are likely to go to the doctor if they suspect they or a loved one has the flu.

- 69.9% of patients reported that they were somewhat or very likely to seek a flu vaccine for themselves or a loved one (see *Fig. 2*).
 - Patients in Vietnam are most likely to seek a flu vaccine (84.9%).
 - Patients in France are least likely to seek a flu vaccine (48.7%).
- 73.3% of patients reported that they were somewhat or very likely to go to a doctor if they suspected they or a loved one had the flu (see *Fig. 2*).
 - Patients in India reported the highest likelihood of going to the doctor (90.2%).
 - Patients in the United Kingdom reported the lowest likelihood of going to the doctor (34.0%).



Likely to Seek a Flu Vaccine or Go to the Doctor if Suspect the Flu, by Country

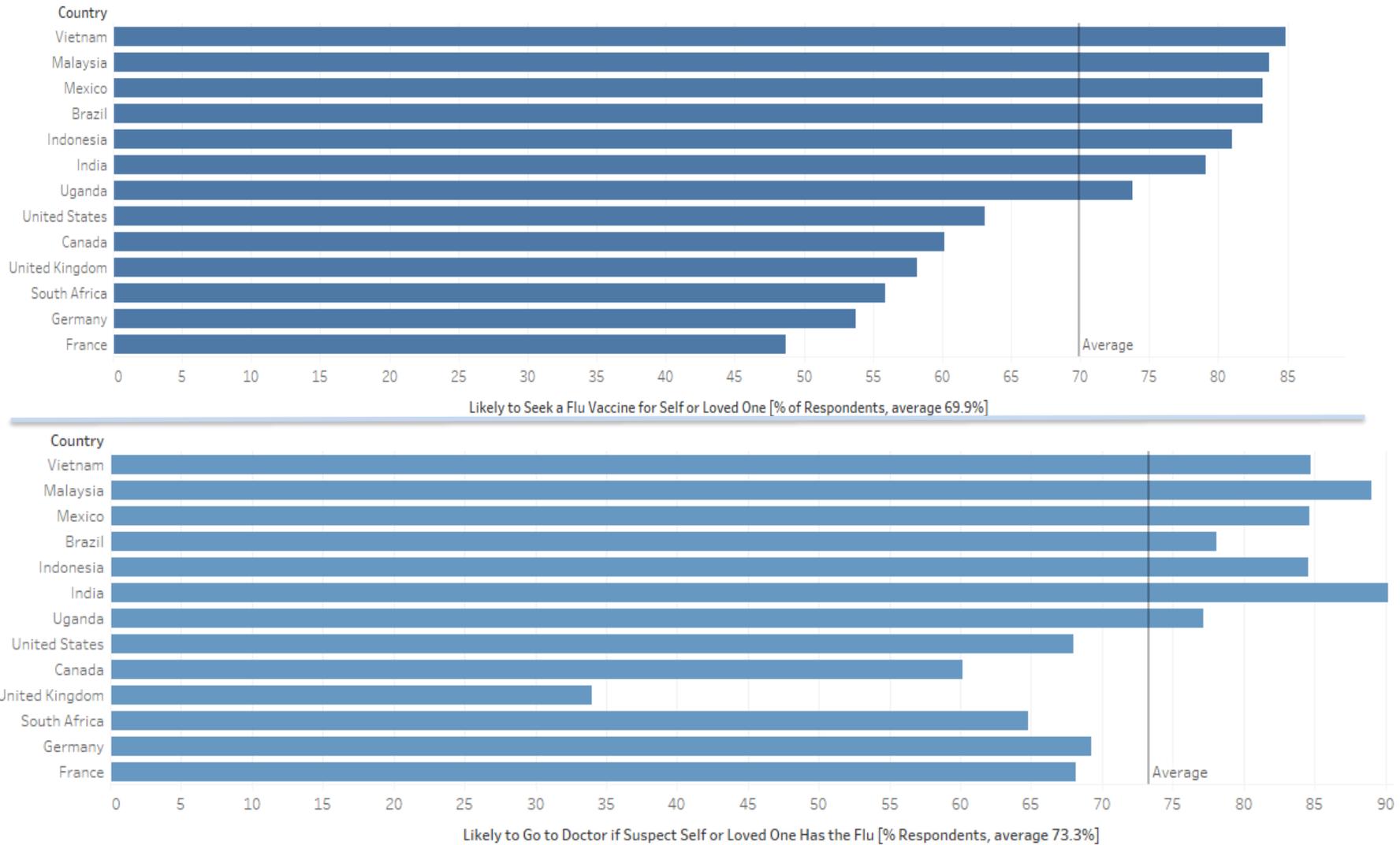


Figure 2 Patients Reporting Likely to Seek a Flu Vaccine for Themselves or a Loved One and Patients Reporting Likely to Go to the Doctor if they Suspect They or a Loved One Has the Flu



Patients were asked about what entity they believe is most responsible for ensuring the medicines they need are available during a personal medical emergency (see Fig. 3).

- The most common response was **National Government** (26.4%), and the second was Local Government (16.4%). Combined, **over 40% of respondents felt that government was the most responsible** for ensuring that the medicines needed for personal medical emergencies are available (total: 42.8%). This number is nearly three times higher than the next most common response.
- The third most common response was Individual (15.7%), that individuals have the most responsibility for ensuring they are personally prepared.
- 10.0% of people are unsure who should be considered the most responsible entity, with 'Don't Know' was the fourth most common response.
- **Private Sector was the fifth most common response (9.7%).**
- International and Local Non-Profits were among the least common responses (7.5% and 4.2%, respectively), but combined would rank as the fourth most common response (11.7%).



During a Personal Medical Emergency, Which One of the Following Do you Feel Would be Most Responsible for Ensuring the Medicines You Need Are Available?

Global Average Response, Unweighted

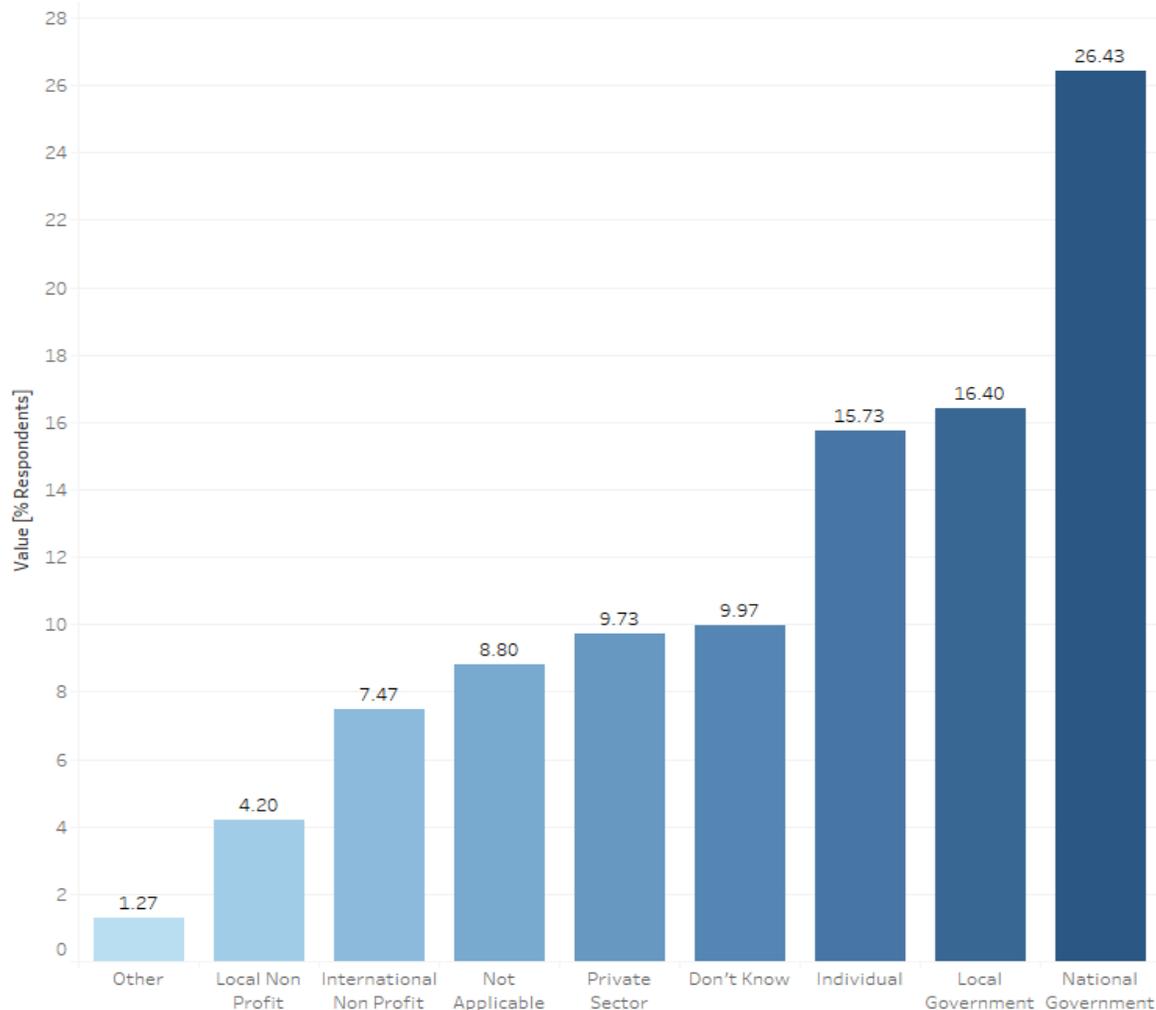


Figure 3 Entities People Feel are Most Responsible for Ensuring Necessary Medications are Available During a Personal Medical Emergency, Overall Percent of Respondents



Risk Perception

Patients were asked about their perception of disaster risk from different types of disaster.

A key finding from this question is that people are as concerned about Natural Disasters as they are about Political and Civil Unrest. People also reported being equally concerned about Disease Outbreaks as Terrorism. Relatively few people (6.1%) reported not being concerned about any kind of disaster.

- Disasters of Greatest Concern, ranked (average², see Fig. 4):
 - Political/civil unrest: 24.1%
 - Natural disaster: 23.3%
 - Terror: 18.7%
 - Disease outbreak: 18.7%

² Unweighted

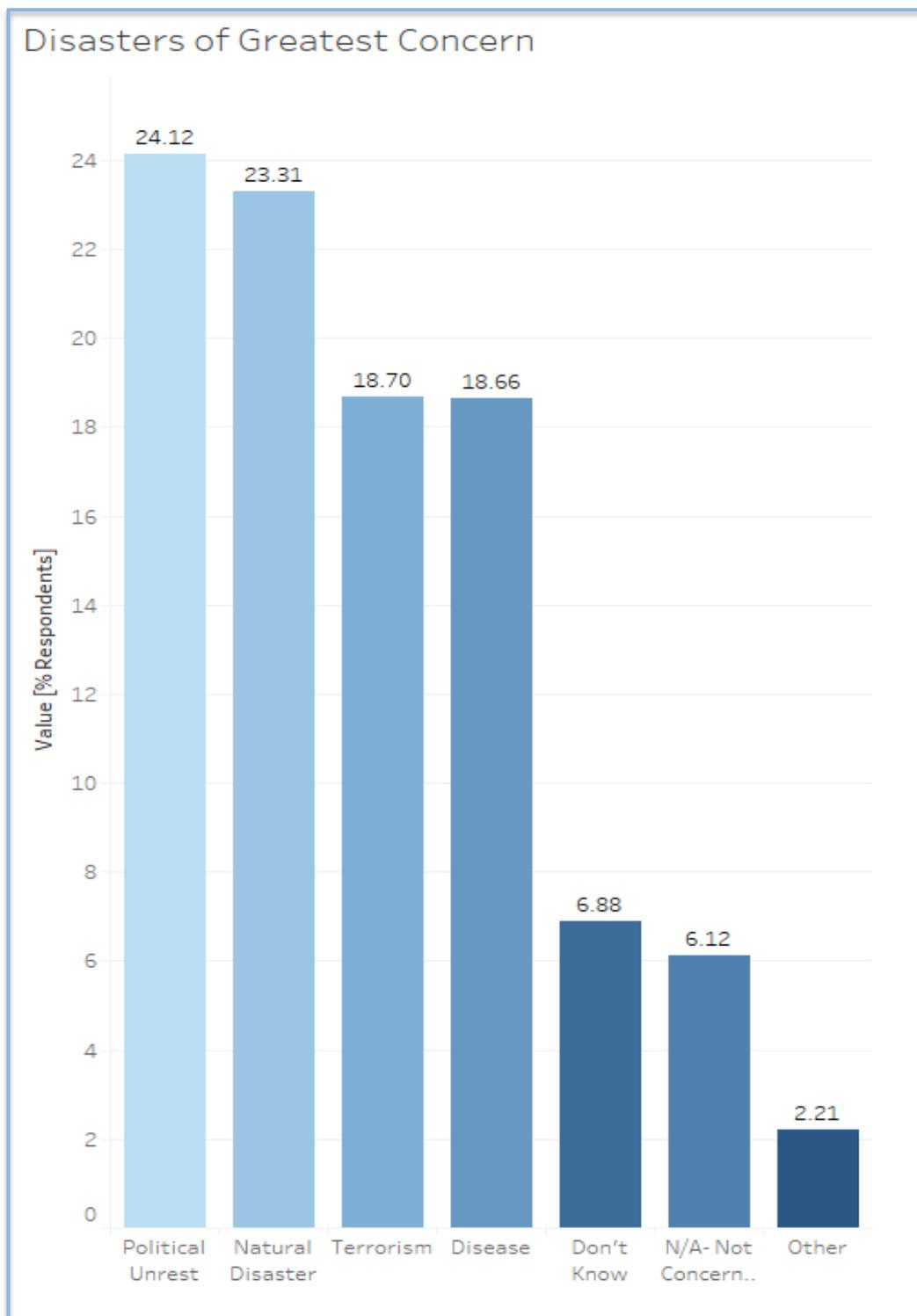


Figure 4 Disasters of Greatest Concern, Overall Percent of Respondents



- Concern about Disease Outbreaks (see Fig. 5):
 - Brazil reported the highest level of concern about disease outbreaks (35.8%, ranked #2 of Brazilians' disasters of greatest concern).
 - Disease outbreaks are the disaster of greatest concern reported by Malaysia (26.2%).
 - The United States reported the lowest level of concern about disease outbreaks (7.8%, ranked #4 of Americans' disasters of greatest concern; 10.2% of Americans reported not being concerned about any disaster).

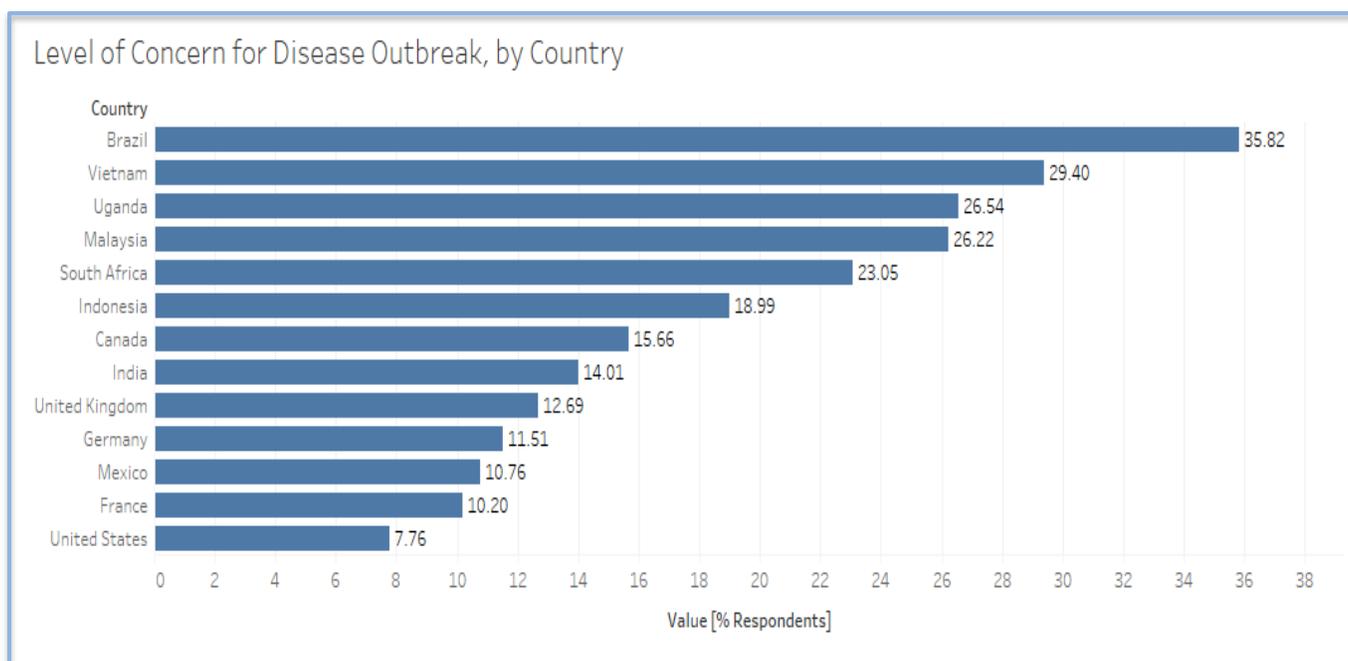


Figure 5 Percent of Respondents Who Ranked Disease Outbreaks as the Disaster of Greatest Concern, by Country



Patients were asked how long they could be without access to medication before they began experiencing negative effects.

The vast majority³ of people in all countries surveyed would experience significant effects after a month or more of being without their regular medications or medical equipment (see Fig. 6).

- **A significant percentage of people in all countries surveyed would begin to experience significant effects within the first week, and even within the first day.**
 - One day: 8.9%
 - Two to four days: 16.0%
 - Five to six days: 8.6%
 - One week: 8.5%

- Note that this question specifically asked how long respondents could go WITHOUT their medications or equipment. Chronic disease patients will have prescription medicines, but this response indicates the time horizon until negative health impacts will be experienced. This result provides visibility on perceived vulnerability for individuals dependent on medicines and medical products, after an event. These numbers are cumulative.
 - **Within a week: 42.0%**
 - **More than a week, less than a month: 54.0%**
 - **After a month or more: 80.8%**
 - Unsure/don't know: 10.0%
 - Not applicable (don't take regular medications or need equipment in the home): 4.9%

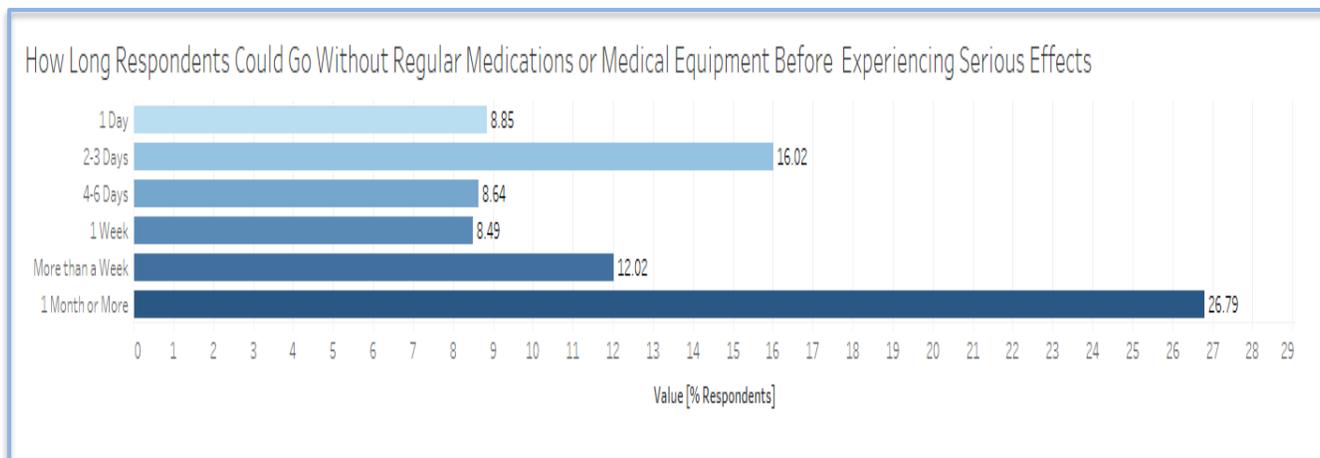


Figure 6 Overall Percent of People Who Would Begin Experiencing Serious Effects Without Their Regular Medications or Medical Equipment by Amount of Time (Not Cumulative)

³ Cumulatively



Acknowledgments

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