

INTRODUCTION

Welcome to the 2013 Pfizer Health Index, which is our eighth edition. This annual survey details the findings of nationally representative quantitative research which has charted the health perceptions, attitudes and behaviours of Irish adults, taking a slightly different focus each year.

The impact of economic austerity and recession on our health is the focus of this year. Since 2010, the Index has tracked changes in relation to private health insurance and medical cards which have seen major changes since the recession began. This year, the net impact of continued fall in insurance, coupled with decreasing medical card provision means a further rise in people with no cover and this has reached 27% which equates with 950,000 people, the highest since we began looking at this issue four years ago. This is of enormous public and personal significance, an increasing number of people are vulnerable at times of ill health and sickness and the continued decline in private insurance increases pressure on public health expenditure.

Looking at the fundamental impacts of the recession such as job loss and reductions in hours of work, the rate of job loss has slowed down, as has the number saying that their hours of work have been reduced which is heartening. However, the proportion saying that their salary has reduced has continued to increase at the same pace as in previous years.

When we looked more broadly at depression and mental health problems – 90% of people agree that depression, anxiety and mental health issues have increased since the recession. When asked in what ways has depression or mental health affected your or your extended family, the top two impacts are in relation to finances being affected and not being able to work.

The area of social media was one which we had not covered before in the Index, so this year, we asked respondents if they believed that modern technology, communications and social media were detrimental to young people's mental health. This has been a very topical issue and of those who have an under sixteen year old in the home, 45% strongly agree that modern technology and social media can be detrimental to young people's mental health.

On a more positive note – the top two short term health intentions are to be more active or take more exercise and to be less stressed. Being more active has increased from 25% in 2011 to 32% in 2013.

Healthcare expenditure is one of the top areas of public expenditure and the pressure on the health budget is understandable considering the severe economic circumstances of recent years. However, we must ensure that positive strides made in recent years are not reversed and that as the economic picture improves, that health remains a top priority.

Yours sincerely,



Paul Reid
Managing Director
Pfizer Healthcare Ireland



EXECUTIVE SUMMARY

The Pfizer Health Index has charted the health status and perceptions of Irish adults for the past eight years. It has consistently illustrated that Irish adults have a high impression of their own health, with the average adult continuing to score themselves as 7.5 out of 10 on a perceived quality of health scale.

However, there has been a continuing decline in the proportions giving themselves very high scores. We see since 2006 a halving in the number scoring themselves as 10 out of 10. 18% of Irish adults gave themselves a perfect score in 2006 and this level had declined to just 9% by 2013.

A number of interesting phenomena are apparent in the 2013 survey. Although the overall effect of the recession may be starting to decline, it is still apparent that there are quite profound effects for about 43% of the Irish adult population.

These effects are most apparent between the ages of 25 and 50 when the majority of households are in "family" life stage and where their net outgoings are much greater.

We notice that while one's personal health and the health of one's immediate family remain the top priorities for the majority, for adults between the ages of 25 and 50 there is a much greater emphasis placed on the importance of finances and the cost of living. These have started to bypass their prioritisation of health. In effect, a group in Irish society, which is primarily characterised by being middle aged (rather than by virtue of their social class) are under significant financial stress and this is causing them to focus much more upon their finances than upon their health.

The 2013 study has a particular focus on mental health and illustrates that about a quarter of Irish adults have reasonably direct experience of mental health issues and almost 3 in 10 acknowledges that there has been an incident of depression within their family circle or close peer group. Roughly 6% of Irish adults have experienced depression themselves.

RECESSIONARY IMPACT

It is evident that the ongoing recession is having a deep impact upon the adult population and that this affects their responses in relation to many other issues. The Pfizer Index has logged the impact of recessionary changes since 2009 and the current study provides a stark illustration of the depth and impact of these.

Which of the following has happened to you or to your immediate family as a result of this current recession?

Personal Impact of Current Recession X Health Status and Class
Base: 1003 / 3, 551,000 Adults Aged 16+

	ALL ADULTS	HEALTH STATUS			SOCIAL CLASS			
		Good Health	Average Health	Poor Health	ABC1	C2	DE	F
Spending less on luxuries	75	77	74	77	60	69	80	70
Avoiding making big purchases	72	72	72	76	58	66	77	69
Going out/socialising less	66	66	69	67	55	62	70	62
Much harder to make ends meet	63	58	68	68	56	53	66	66
Grocery shopping in cheaper shops now	54	54	56	58	39	47	58	54
Not booking overseas holidays	47	47	49	49	31	43	49	45
Not booking any holidays	46	43	51	50	28	41	49	44
Difficulties making loan or mortgage payments	33	32	39	33	20	29	37	27
Changed utility supplier (e.g. gas, electricity etc)	31	32	31	34	16	24	35	33
Self - reduced salary at work	26	27	29	22	21	28	27	19
Giving up gym or club memberships	21	24	22	20	11	20	24	17
Partner - reduced salary at work	19	23	22	15	10	17	22	16
Personally lost job	18	14	20	23	7	14	18	20
Self-reduced hours at work	17	15	22	18	6	18	18	11
Cutting down on kids after-school or extra curricular activities or lessons	17	15	20	19	12	13	19	16
Queried the cost of medicines with the GP/Pharmacist	16	17	18	15	11	11	18	18
Partner - reduced hours at work	14	13	18	14	7	13	16	11
Ask GP/Pharmacist to prescribe cheaper medicines	13	15	13	13	4	6	16	15
Stop paying for private medical insurance (i.e. VHI etc)	12	12	12	13	8	10	15	8
Stopped using car/car off the road	12	10	13	16	6	10	11	15
Partner has lost job	11	8	13	14	3	7	13	11
None of these	14	14	13	13	25	18	11	17

Three out of four households are now spending less on luxuries and a similar proportion are avoiding making large purchases. 63% say it is harder to make ends meet and two thirds have reduced their frequency of going out and socialising.

More than half of all adults indicate that they are now shopping at cheaper stores and almost as many claim that they are neither booking overseas holidays nor booking any holidays at all.

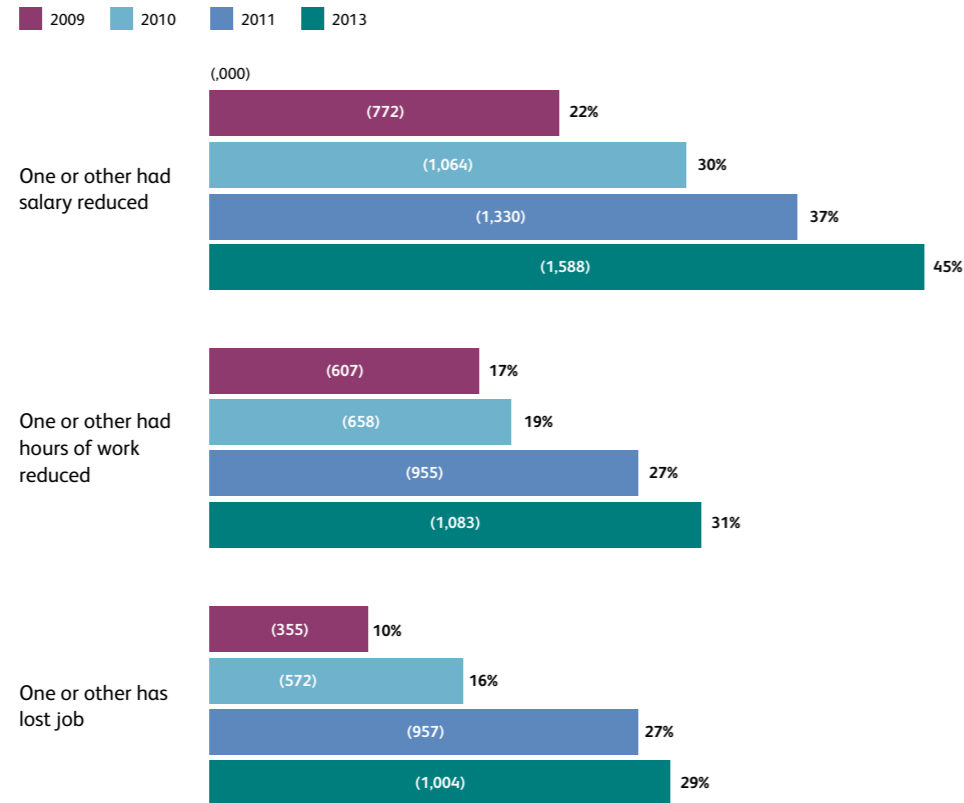
About a third of all adults say that they are having difficulty making loan or mortgage repayments and one in eight say that they have either stopped using their car or have taken a car off the road. A similar number have ceased investing in private medical insurance.

The Pfizer Index has developed a measure of what is described as "fundamental recession impact" which is derived from the accumulation of data in relation to salary reduction, hours of work reduction and job loss.

Which of the following has happened to you or to your immediate family as a result of this current recession?

Fundamental Recession Impact*
Base: 1,003/3,551,000 Adults Aged 16+

*Employment related impact experienced by self or partner

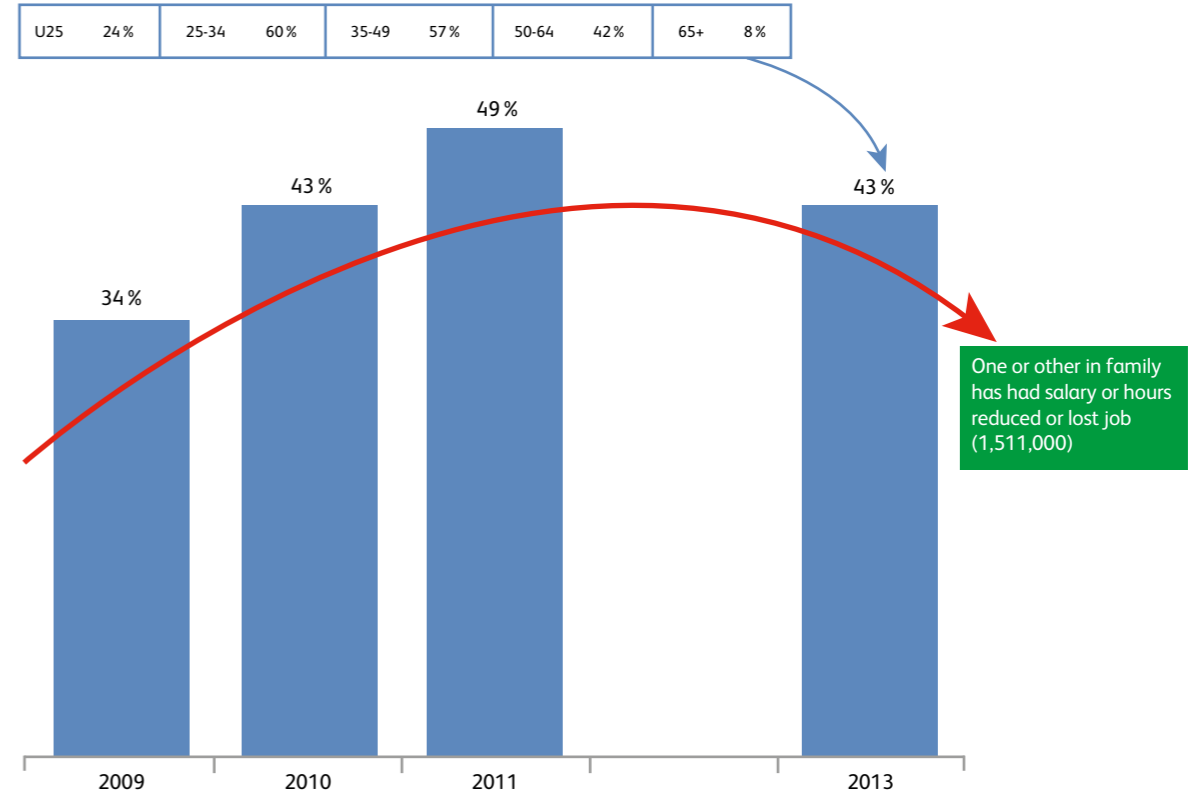


The rate of increase of job loss has slowed down, as has the number saying that their hours of work have been reduced. However, the proportion saying that their salary has reduced has continued to increase at the same pace as before.

Accumulating these three factors together, we get the Pfizer composite measure of fundamental recessionary impact.

Composite measure of fundamental recession impact identified by measuring the percentage of adults who have experienced job loss, reduced hours of work or reduced salary?

Pfizer Composite Measure of Fundamental Recession Impact

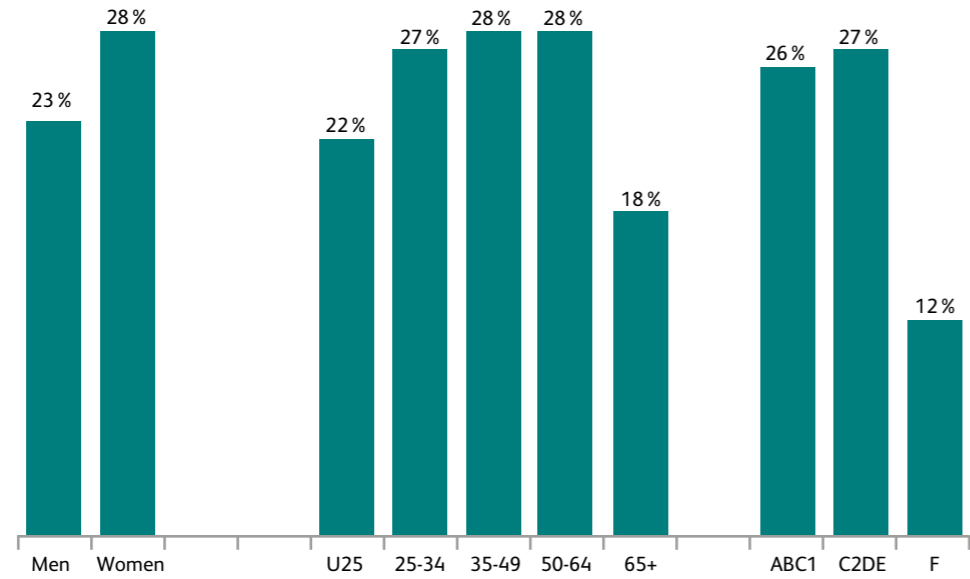
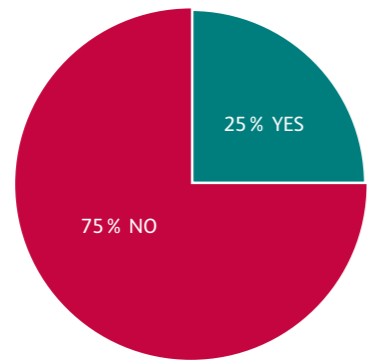


The level of fundamental impact is diminishing, but there is massive age disparity: those aged 25-49 have been hugely impacted by the recession. This Index had advanced from 43% in 2010 to 49% in 2011. On next measuring it we see that it has fallen back to the 43% level in 2013. However underlying this we know that the level of fundamental impact is much greater between the ages of 25 and 49, indicating that this middle aged band, or more typically the family life stage, is particularly suffering from recessionary impact and salary reduction.

INCIDENCE

Has anyone in your immediate family or close group of friends experienced problems with mental health?

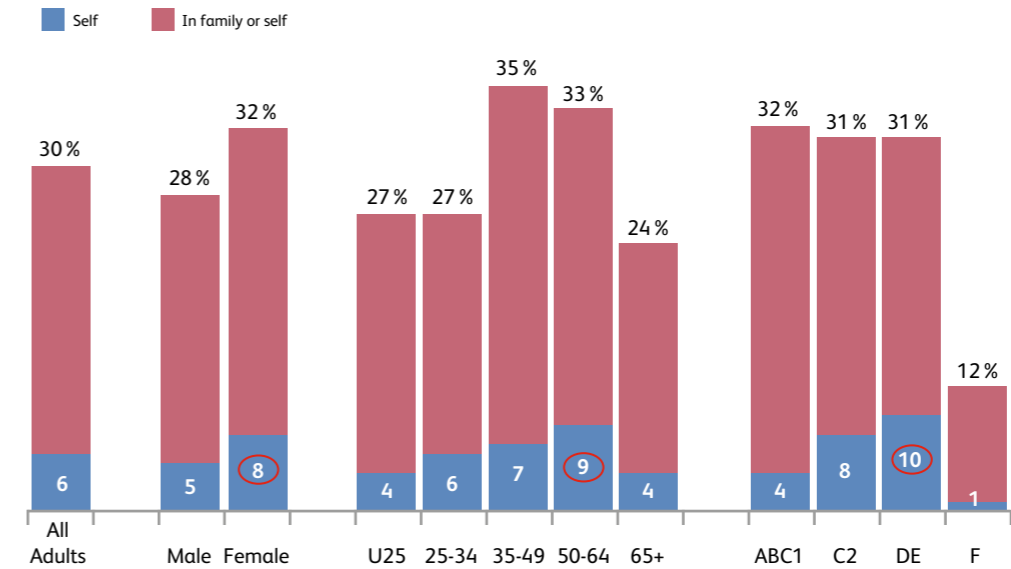
Experience of Mental Health problems in immediate family or friends
Base: Adults aged 16+, 1003/3,551,000



Approximately 1 in 4 of the Irish population has experience of mental health problems within their immediate family or close network of friends.

Has anyone in your immediate family suffered from depression or from poor mental health?

Experience of Depression or poor mental health in immediate family
Base: Adults aged 16+, 1003/3,551,000



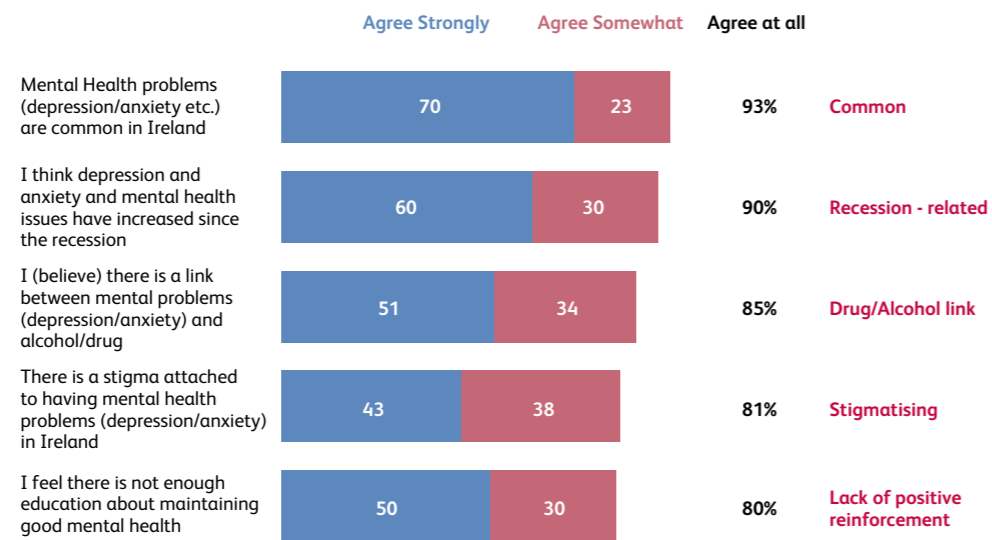
When asked to focus on themselves, about 6% of the Irish adult population say that they themselves have experienced depression and again this is higher among women than men and particularly peaks between the age of 50 and 64.

ATTITUDES TO MENTAL HEALTH

The vast majority of adults subscribe to a fairly uniform and consistent series of views about depression.

Thinking about the area of mental health (encompassing depression and anxiety) to what extent would you personally agree or disagree with the following statements?

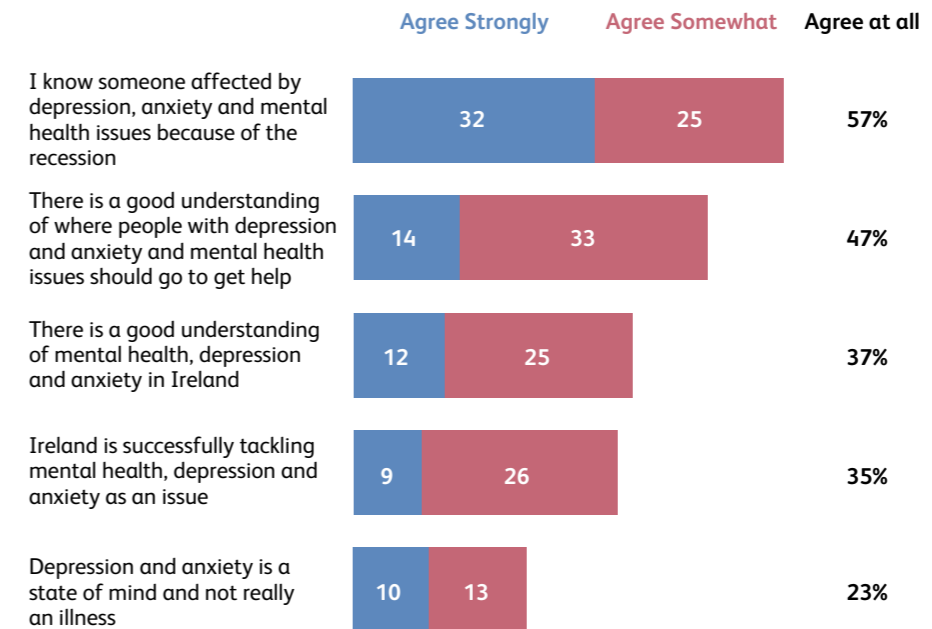
Universal views about depression
Base: Adults aged 16+, 1003/3,551,000



There is common agreement that mental health problems are common in Ireland and are felt to have increased as a result of the on-going recession. Many believe that there is insufficient education about maintaining good mental health; 80% agree with this and 50% agree with it strongly.

Thinking about the area of mental health (encompassing depression and anxiety) to what extent would you personally agree or disagree with the following statements?

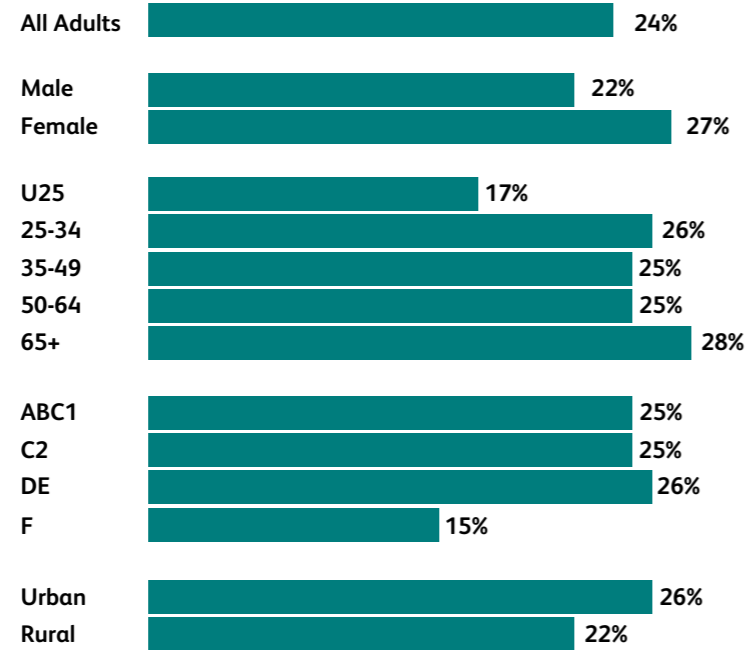
Lower levels of agreement in relation to mental health problems
Base: Adults aged 16+, 1003/3,551,000



There is a perceived strong link between mental health problems and the recession: 9 in 10 feel that such issues have increased since the recession (6 in 10 strongly agree with this), while almost 6 in 10 (57%) believe that they know someone affected by depression, anxiety and mental health problems because of the recession. 32% are strongly convinced of this, corresponding effectively with the perceived incidence of depression recorded earlier in the study. Only 47% agree there is a good understanding of where people with mental health issues should get help.

Thinking about the area of mental health (encompassing depression and anxiety) to what extent would you personally agree or disagree with the following statements?

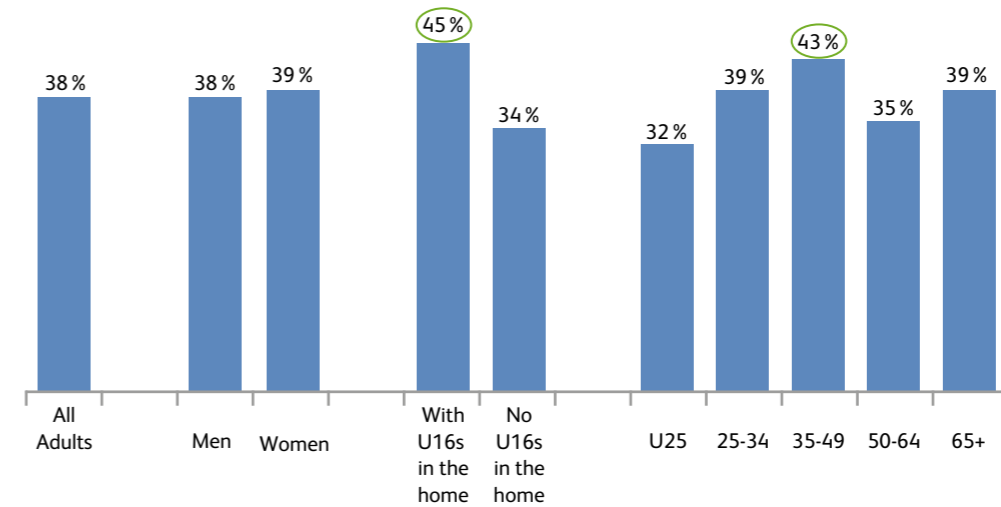
Negative news in the media affects my mood and outlook on life - Strongly Agree
Base: Adults aged 16+, 1003/3,551,000



When asked about mental health, a quarter of adults felt that negative news in the media affected their mood and outlook on life.

Thinking about the area of mental health (encompassing depression and anxiety) to what extent would you personally agree or disagree with the following statements?

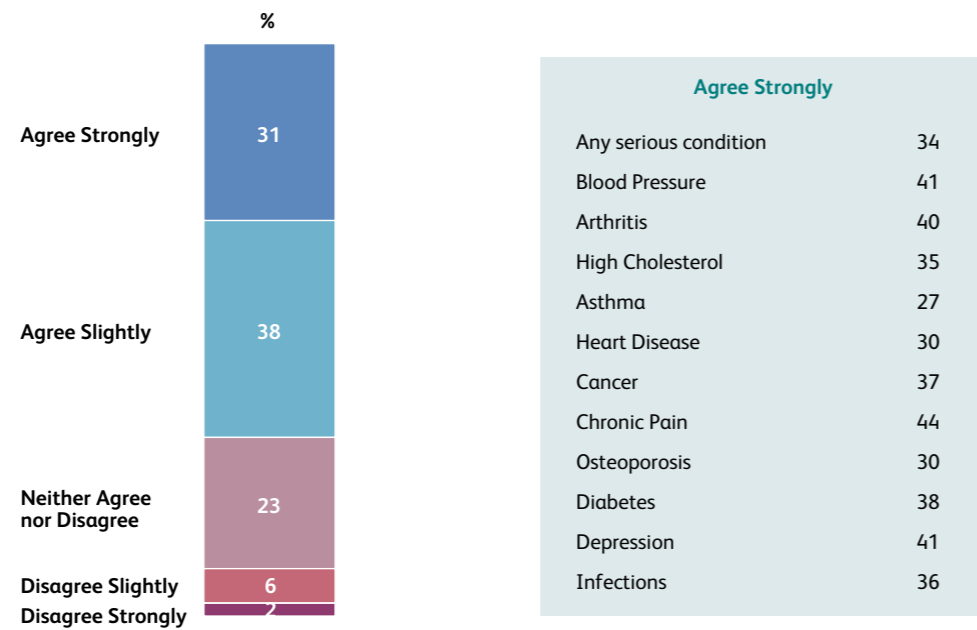
Modern technology, communications and social media can be detrimental to young peoples mental health – Strongly Agree
Base: Adults aged 16+, 1003/3,551,000



The research also focused upon communications technology and social media and the perceived impact they may have on young people. Almost 2 in 5 adults are of the view that modern technology encompassing social media can be highly detrimental to young people's mental health. This is most likely to be agreed with by those between the ages of 35 and 49 and particularly those with children in the home, (parents of under 16s) of whom 45% are in strong agreement with this statement.

Thinking about the area of mental health (encompassing depression and anxiety) to what extent would you personally agree or disagree with the following statement?

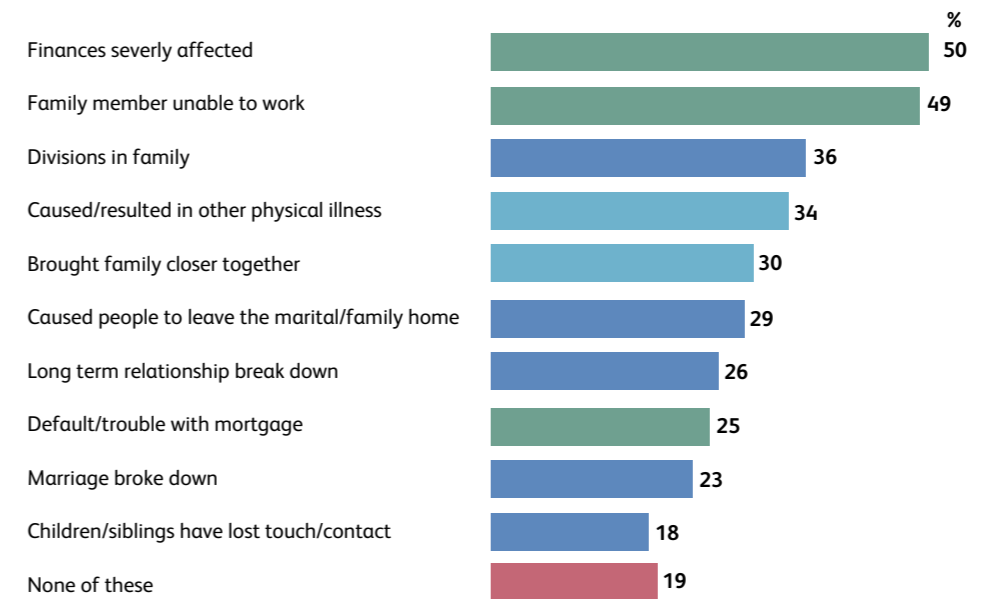
People with chronic diseases are more likely to have problems with depression, anxiety and mental health
 Base: Adults aged 16+, 1003/3,551,000



69% agreed, either strongly or slightly, that people with chronic diseases are more likely to have problems with depression, mental health and anxiety.

In what ways, if any, has this affected your immediate/extended family?

Ways in which depression has impacted immediate/extended family
 Base: 314 Adults impacted by depression /1,069,000

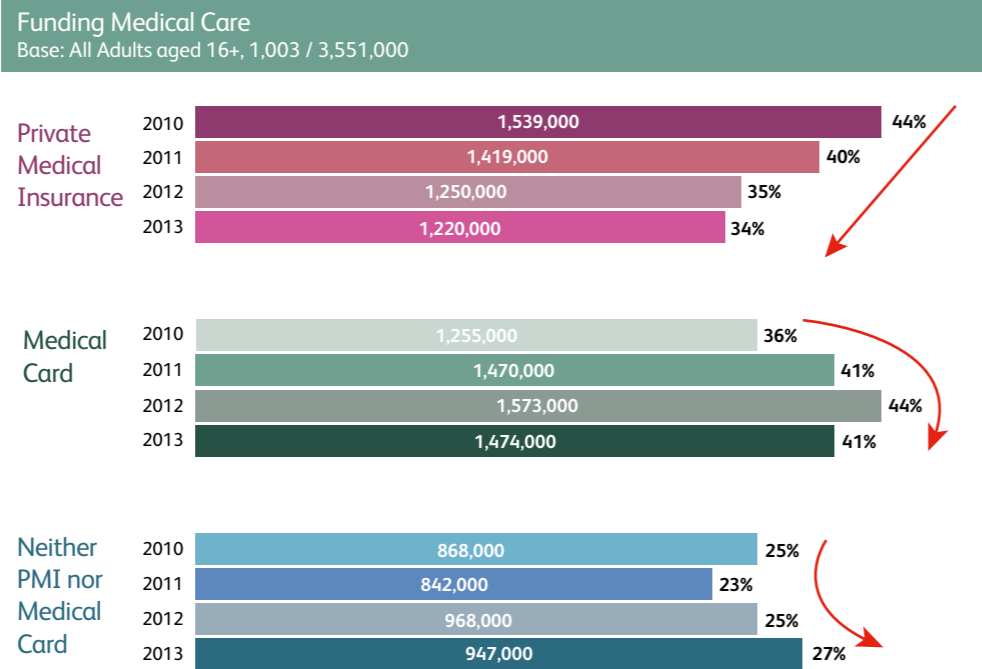


The vast majority indicate that there has been a severe financial impact, with about half characterising an affected family member as unable to work as a result of depression. Just 1 in 5 suggest that none of these various consequences resulted from an incidence of depression, but many suggest that there were divisions in the family, that people were forced to leave the family home, that relationships had broken down and ultimately a quarter suggested that a marriage had broken down. Interestingly, about 3 in 10 who had been affected in this way felt that the experience of depression had ultimately brought the family closer together. A slightly larger number (34%) suggested that depression had led to other physical illnesses.

FUNDING OF HEALTHCARE

Over the past four years the Index has examined the number of people having private medical insurance and holding medical cards. The 2013 Index illustrates that the rate of decline in those covered by private insurance has slowed significantly. Currently, 34% of the adult population say that they have private medical insurance. This level had been one percentage point higher in 2012, but 10 percentage points higher three years ago. Between 2010 and 2012 a profound contraction in the market for health insurance was apparent, but the rate of decline has been considerably arrested over the past year.

Which of the following descriptions apply to you - I have a medical card, I have private medical insurance, neither medical card or private insurance?

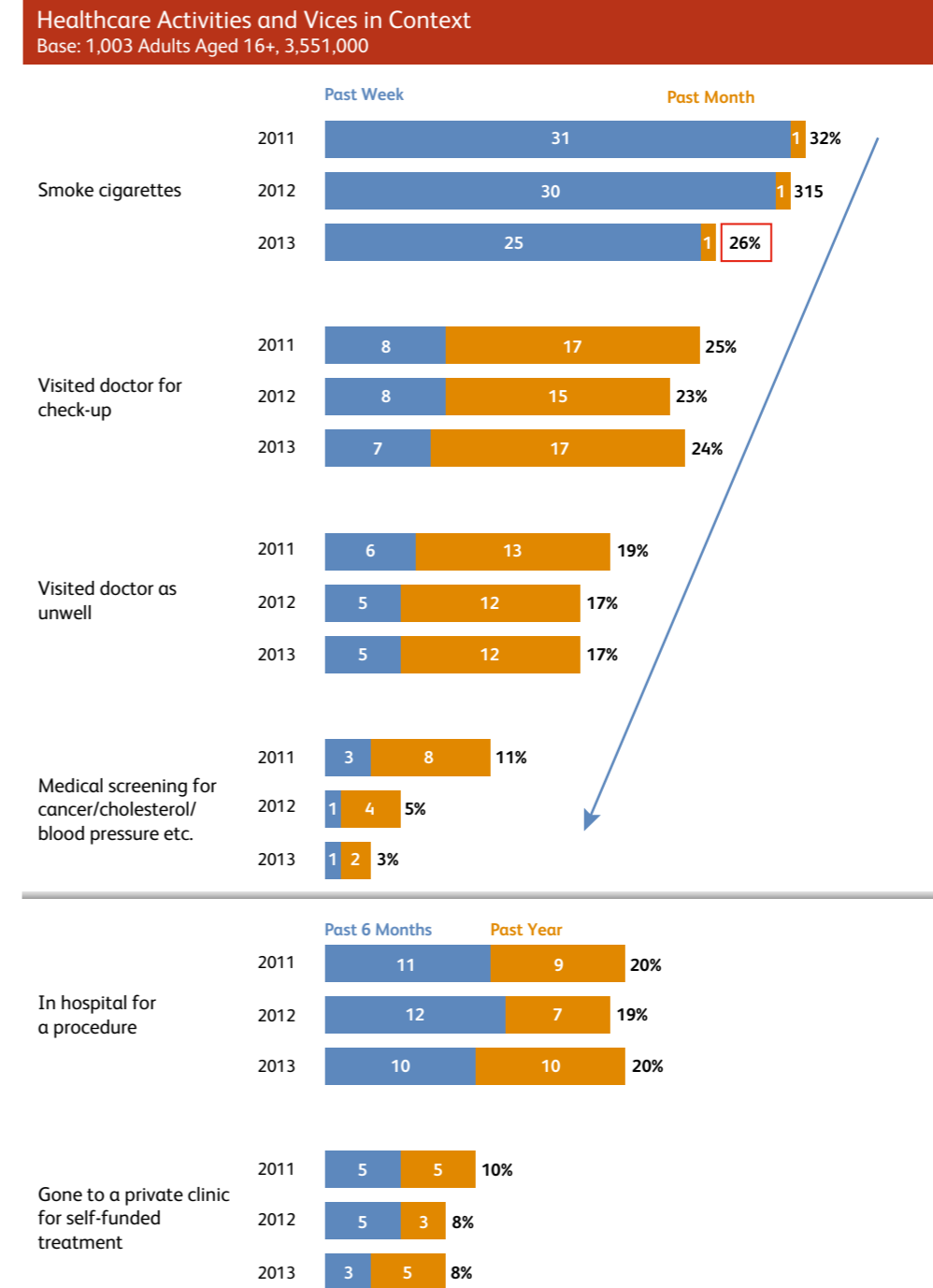


There has been a fall in the number of people holding medical cards. Those with private health insurance continues to decline, though at a much slower pace than previous years.

MEDICAL INTERACTION

Frequency of visiting a doctor is gradually lengthening; about the same numbers are visiting on an annual basis, but the proportion visiting within the past month, whether for a check-up or because they were unwell, has reduced slightly.

When did you last do each of the following?



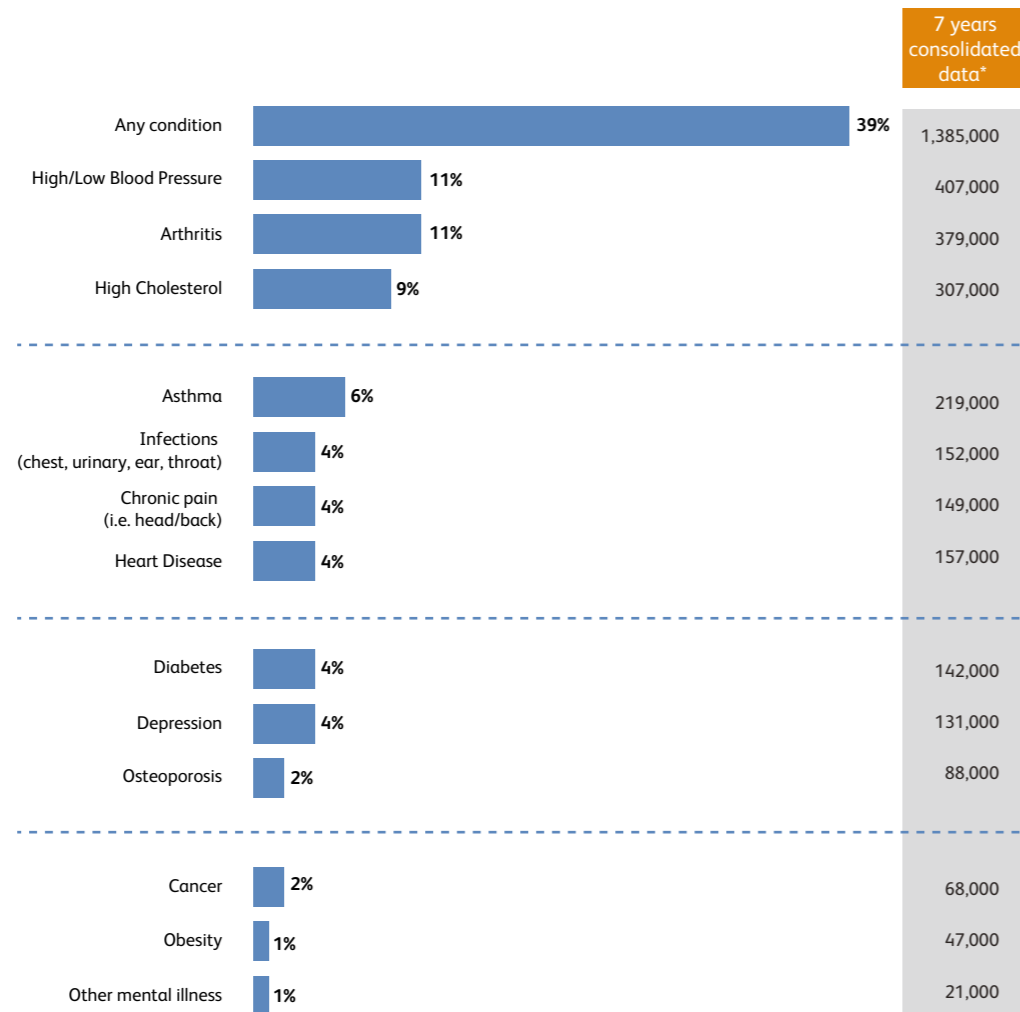
ILLNESS EXPERIENCE

The data on illness experience is cumulated across seven annual surveys, producing a large base of interviews and eliminating annual variances that are more likely to be reflective of survey factors than of any real change in the underlying experience of illness. The data reported in the 2013 Pfizer Index is based on the accumulation of 7,170 interviews over a seven year period.

The long-term picture is of an incidence rate for any of the significant illnesses monitored at about 39%. Illness incidence is markedly higher as one gets older, registering at just 17% under the age of 25, rising to 31% between 35 and 50, to 39% between 50 and 64 and 81% over the age of 65.

Do you suffer from any of the following conditions?

Conditions Personally Experienced: 2007 to 2013 combined
Base: All Aged 16+, 7,170



*Analysis uses 2013 estimate of adults aged 16 and over

Do you suffer from any of the following conditions?

Conditions Experienced X Demographics
Base: All Respondents Combined 7 yrs: 7,170

7 years consolidated data

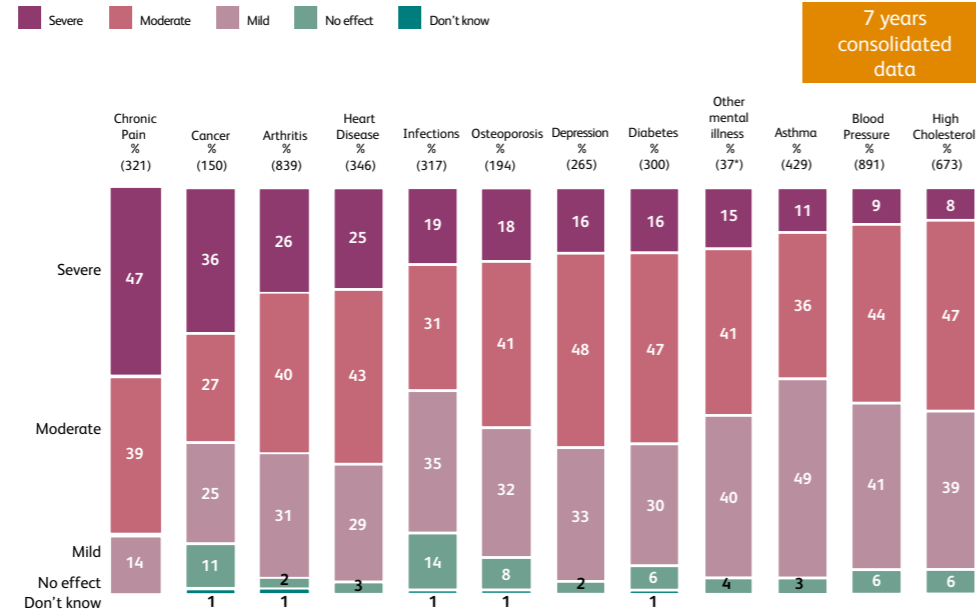
	TOTAL	SEX		AGE					SOCIAL CLASS			
	2013	Male	Female	U25	25-34	35-49	50-64	65+	ABC1	C2	DE	F
Base:	7170	3516	3654	1142	1444	1852	1498	1234	2967	1659	1897	647
	%	%	%	%	%	%	%	%	%	%	%	%
- Suffer from ANY	39	36	42	17	20	31	59	81	34	35	48	47
High/Low Blood Pressure	11	11	12	1	3	6	21	34	9	9	15	17
Arthritis	11	8	13	1	2	5	18	38	7	8	15	21
High Cholesterol	9	8	9	0	1	6	18	23	7	8	11	10
Asthma	6	5	7	10	6	6	5	4	6	6	7	4
Infections (chest, urinary, ear, throat)	4	3	6	4	4	5	5	5	4	4	5	5
Heart Disease	4	6	3	*	1	2	7	16	3	4	7	6
Chronic Pain (i.e. head/back)	4	4	4	1	2	5	7	7	4	4	6	4
Diabetes	4	4	4	1	1	3	6	12	3	3	6	5
Depression	4	3	4	1	4	5	4	3	2	4	6	3
Osteoporosis	2	1	4	*	*	1	4	10	2	1	4	4
Cancer	2	2	2	*	*	1	3	5	1	2	2	3
Other mental illness	1	1	1	*	1	1	1	-	*	1	1	-
Obesity	1	1	2	*	1	1	3	1	1	1	1	2
Alzheimer's	*	*	*	-	-	-	-	1	-	*	*	*
Multiple Sclerosis	*	*	*	-	*	*	*	*	*	*	1	-
COPD	*	*	*	-	-	*	*	1	*	*	*	-
Substance/Drug Abuse	*	*	*	*	*	*	*	-	*	*	*	-
Other addiction issues	*	*	*	*	*	1	*	*	*	*	1	*
Other	2	2	2	1	1	2	3	4	2	2	3	2
None	61	64	58	83	80	69	41	19	66	65	52	53

* Indicates less than 0.5%

In relation to most of these conditions the data is quite stable from year to year. There is a marked growth in the likelihood of illness as one ages, and relatedly illness incidence is much higher amongst those from the least well off DE background. Many DE's are so classified because they are aged 65 and over and don't have a private pension. Thus, there is substantial correlation between the DE socio-economic group and those over the age of 65.

Would you consider (your condition) to be severe, moderate, mild or of no effect to you at all?

Severity of Medical Conditions (Rolling 7 Year Data)
Base: All Respondents 7,170 / 3,551,000



A quarter or more feel that their heart disease, arthritis, cancer or pain has a severe effect on their lives. Up to a half with infections, asthma, blood pressure or cholesterol have only limited effects. Depression has at least a moderate effect on two out of three.

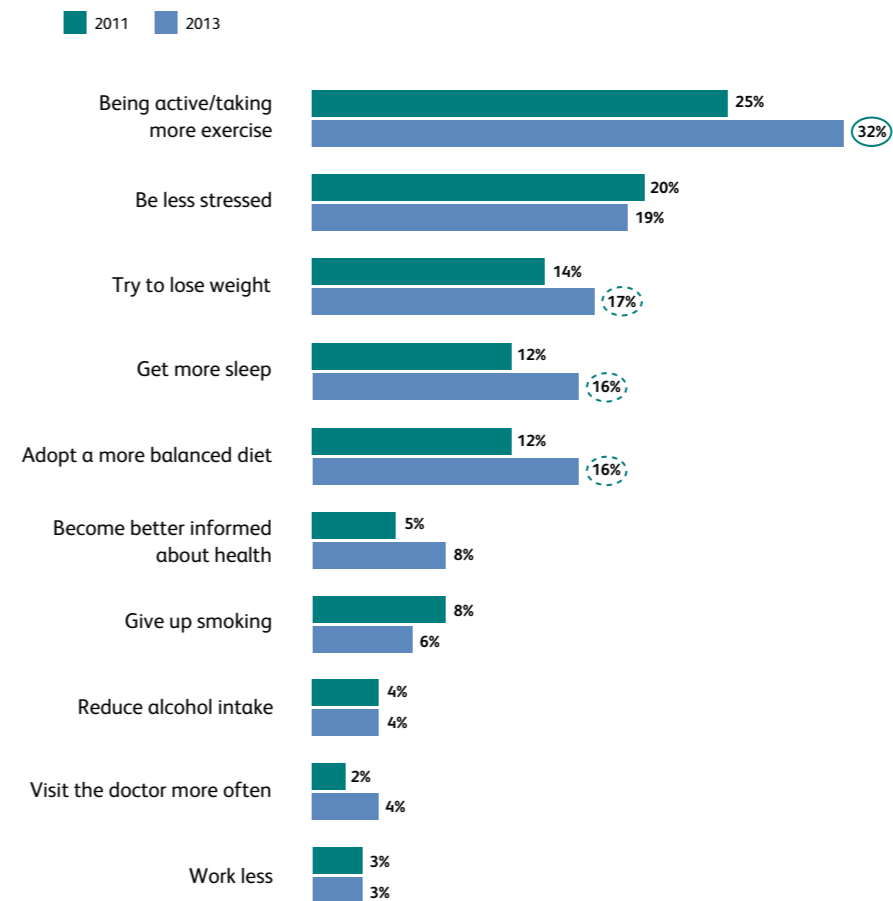
HEALTH INTENTIONS

Adults were asked whether they had an intention of making any changes to a variety of health related issues over the next three months. The range of potential options included being active and taking more exercise, trying to be less stressed, attempting to lose weight, getting more sleep and so forth.

Which of the following, if any, do you think you are likely to do in the next three months?

Short Term* Health Intentions
Base: Adults Aged 16+, 1003 / 3,551,000

*Likely to do next 3 months



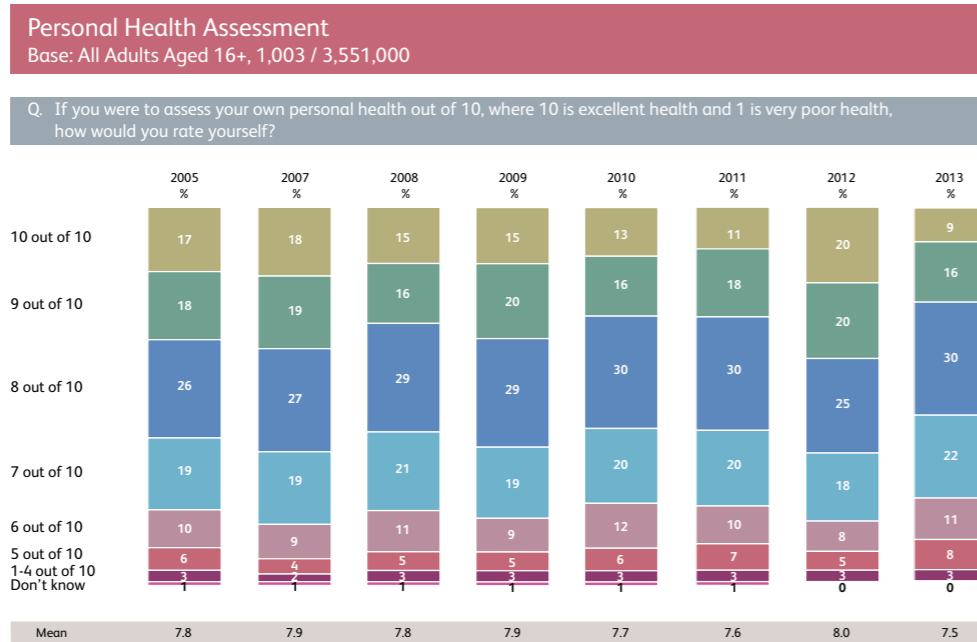
Many are keen to become more active and there is a notable growth in the numbers who would also like to lose weight, to get more sleep and to adopt a more balanced diet.

HEALTH ASSESSMENT

The data from the 2013 Pfizer Health Index illustrates a continuing gradual decline in average health perceptions, albeit with a very high proportion of adults believing that they are in good or very good health. Respondents are asked to assess their own personal health out of 10, where 10 denotes excellent health and 1 reflects very poor health. The average result elicited is 7.5, and indeed as many as 77% of all adults give themselves a score of 7 out of 10 or higher.

We know from previous surveys (and from global comparative data) that the Irish score is very high by international standards and reflects a degree of positivity that is felt to be underpinned by the Irish national psyche, but also by the relative youth of the local population.

If you were to assess your own personal health out of 10, where 10 is excellent health and 1 is very poor health, how would you rate yourself?



What is notable is that the proportion giving themselves 10 out of 10 or indeed 9 out of 10 for their general health has been consistently reducing over a period of years, with more people tending to give themselves 7 or 8 out of 10. Thus very high marks have reduced somewhat and reasonably consistently, although the magnitude of the decrease is essentially slight.

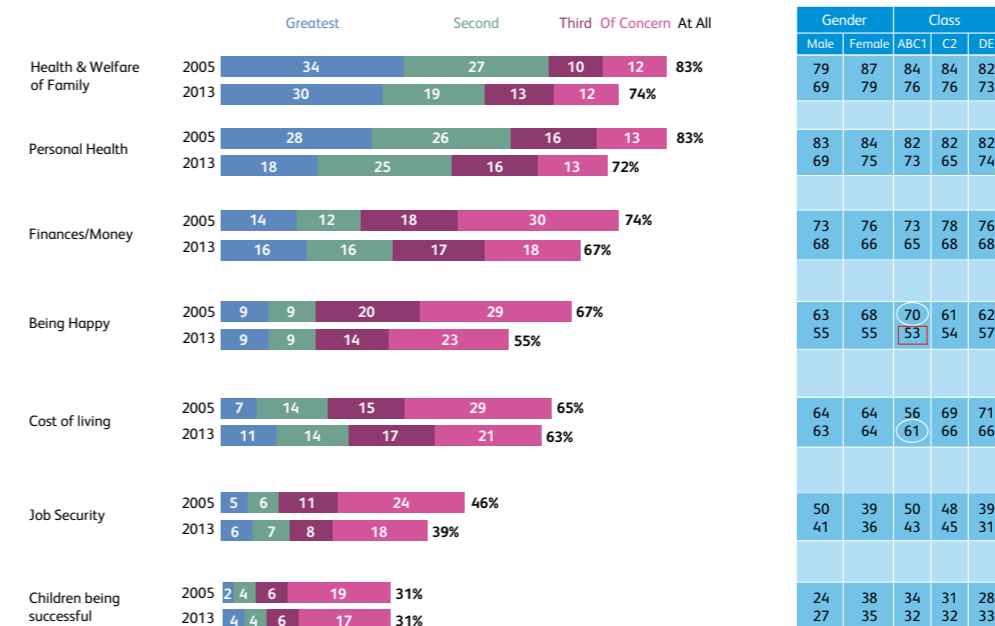
PRIORITISATION OF HEALTH

Respondents were asked to list their priorities, weighing up their concern at maintaining the health and welfare of their family, their own personal health and so on, against a variety of other elements such as finance and money, the cost of living, happiness, job security and, the success of one's children.

Thinking about the future which of the following would concern you most? Which second? Which third? And which others are of concern to you at all?

Ranking of Personal Concerns, 2005 vs 2013
Base: Adults aged 16+

"Thinking about the future, which of the following concerns you most etc...?"



Although we can see a very high level of prioritisation of the health and welfare of one's family and of one's personal health, it is quite clear that finances and money and the cost of living have increased in prominence in recent years.

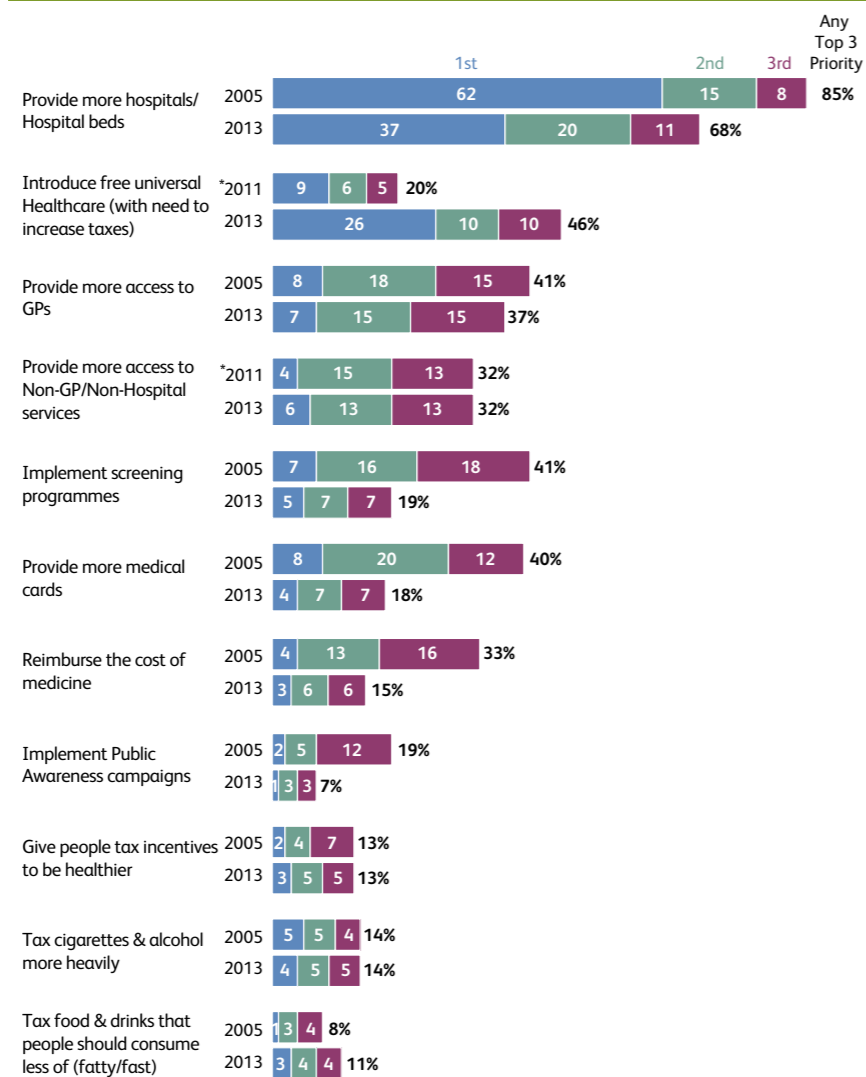
HEALTH REFORM

Since the Pfizer Health Index commenced questions have been periodically posed to rank a series of potential improvements or enhancements to the medical system. These have included aspects such as the provision of more hospital beds, the implementation of screening programs, and initiatives such as providing tax incentives to make people behave in a healthier manner.

The essential order of priorities has been reasonably constant since the introduction of the study, with the greatest focus placed upon the provision of hospital beds, which remains the top priority for almost 4 in 10 adults. However, the 2011 Index introduced a new option, "the introduction of free universal healthcare" and this has attracted substantial interest, which is particularly apparent in the current study.

If you were made Minister of Health, could you give me the order in which you would address the following priorities? Only rate those you feel you would want to address.

Longer term change in prioritisation of health issues 2005 – 2013



*Included in 2011 No 2005 comparison available

If you were made Minister of Health, could you give me the order in which you would address the following priorities? Only rate those you feel you would want to address.

Top 3 Priorities X Age

	Total	GENDER		AGE					SOCIAL CLASS		
		Male	Female	U25	25-34	35-49	50-64	65+	ABC1	C2	DE
	%	%	%	%	%	%	%	%	%	%	%
Provide more hospitals/more hospital beds	68	65	69	64	70	64	66	76	60	67	76
Introduce free universal healthcare access for all	45	46	46	46	41	51	45	43	49	47	41
Provide more access to GPs	32	32	33	32	30	34	36	33	31	33	34
Provide more access to non GPs/non hospital services	31	29	33	28	30	30	33	34	31	29	36
Implementing screening programmes	23	24	24	13	24	25	26	25	30	19	18
Provide more medical cards	21	18	23	25	23	19	21	17	16	22	27
Reimburse the cost of medicines	16	16	17	13	15	16	18	16	17	14	13
Tax cigarettes and alcohol more heavily	14	15	12	15	15	10	14	19	16	14	9
Give people tax incentives to be healthier	13	13	11	13	11	14	10	10	17	11	7
Implement public awareness campaigns	10	12	7	12	12	10	8	9	9	13	9
Tax foods and drinks that people should consume less of (fatty foods/fast foods)	10	10	9	18	10	10	8	8	13	11	5

Those in the 25-34 year old age group and those over 65 prioritised the provision of more hospital beds, while those in the 'family life stage' in the 35-49 year old age group rated free universal healthcare access as their main priority.

How the Research was Undertaken

This report outlines and discusses the findings from the 2013 Pfizer Health Index. This is the eighth edition of an important annual research series, which has charted the health perceptions, attitudes and behaviour of Irish adults, taking a slightly different focus each year. Some years have focused more on a specific demographic, such as studying the healthcare status of women, men or older people, while others have adopted a particular focus on a contemporary theme such as the recession. The focus for the 2013 has been the impact of recession and austerity on health, particularly mental health.

Consolidation of Illness Data

Each of the Pfizer Indices asks specifically about a series of illnesses and conditions. To ensure that the data is sufficiently robust, these figures have been accumulated together over a 7 year period, providing a very large and stable sample for analysis of more than 7,000 respondents. This enables us to have greater confidence about the data in relation to smaller conditions, and to focus in considerable depth on areas such as diabetes, depression, chronic pain and indeed cancer.

Sample Structure & Methodology

The basic sample for this survey is 1,003 adults aged 16+, and the sample is quota controlled to ensure a precise representation of the adult population aged 16 and over in respect of key demographic parameters. These quotas relate to gender, age group, socio-economic status, region and area of residence (whether urban or rural).

The questionnaire is included on one of Behaviour & Attitudes' fortnightly Barometer surveys, and each of these is identically structured to enable the undertaking of directly comparable studies and the tracking of attitudes and opinions. Fieldwork on each survey is completed at 63 randomly selected sampling locations, with each interviewer being assigned a demographic quota for his or her sampling point. The sampling locations are randomised but a specified number are completed within each region. A set proportion of men and women are interviewed at each location and additionally controls are used in relation to age group and socio-economic status. When the data from each of the 63 sampling locations is accumulated the survey identically mirrors the structure of the national adult population.

Interviewing is undertaken face-to-face and in-home, with respondent's answers being recorded by the interviewer on their computer.

