

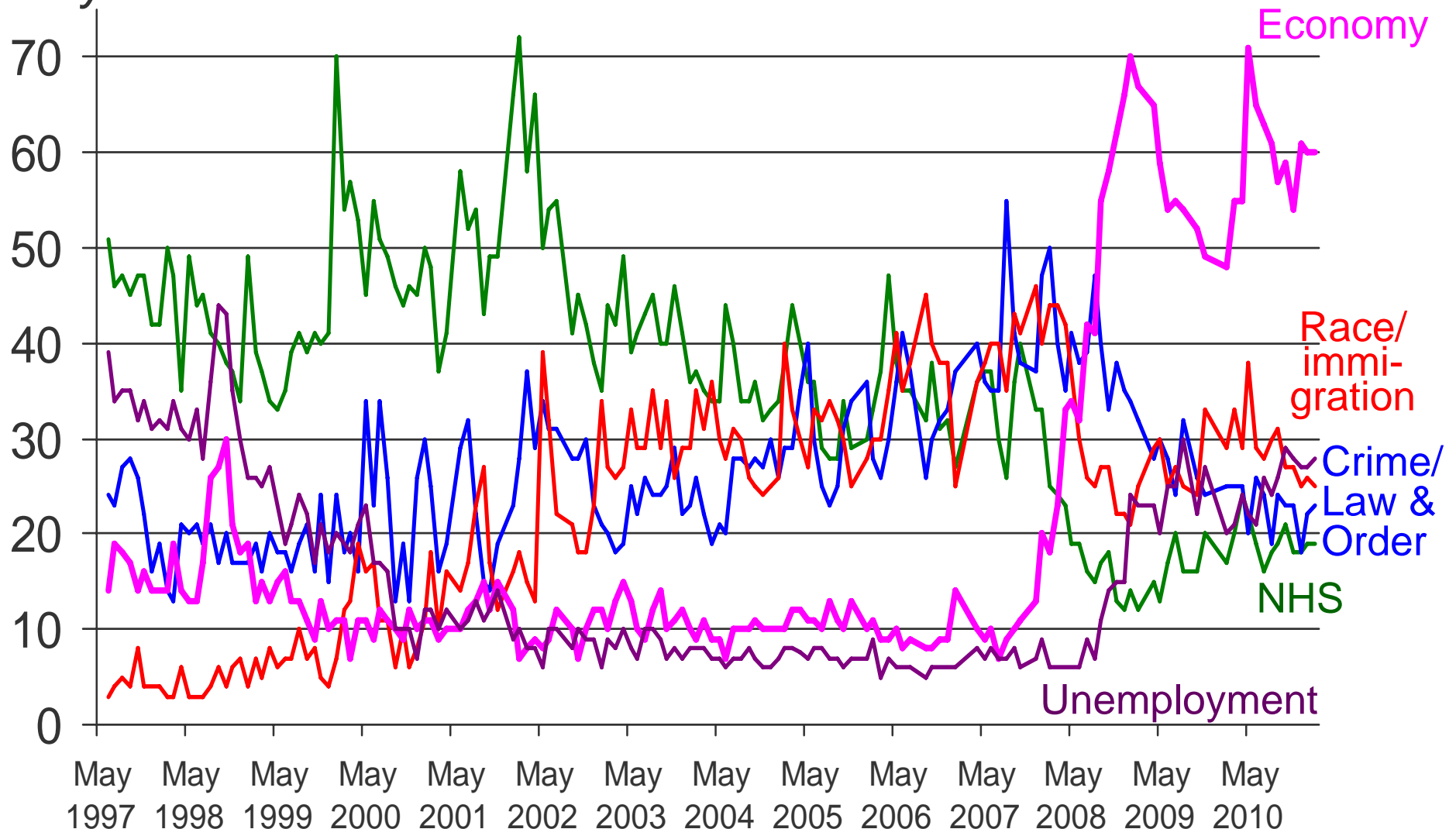
Success and the NHS

Ben Page
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Ipsos MORI

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Public anxiety low – at the moment

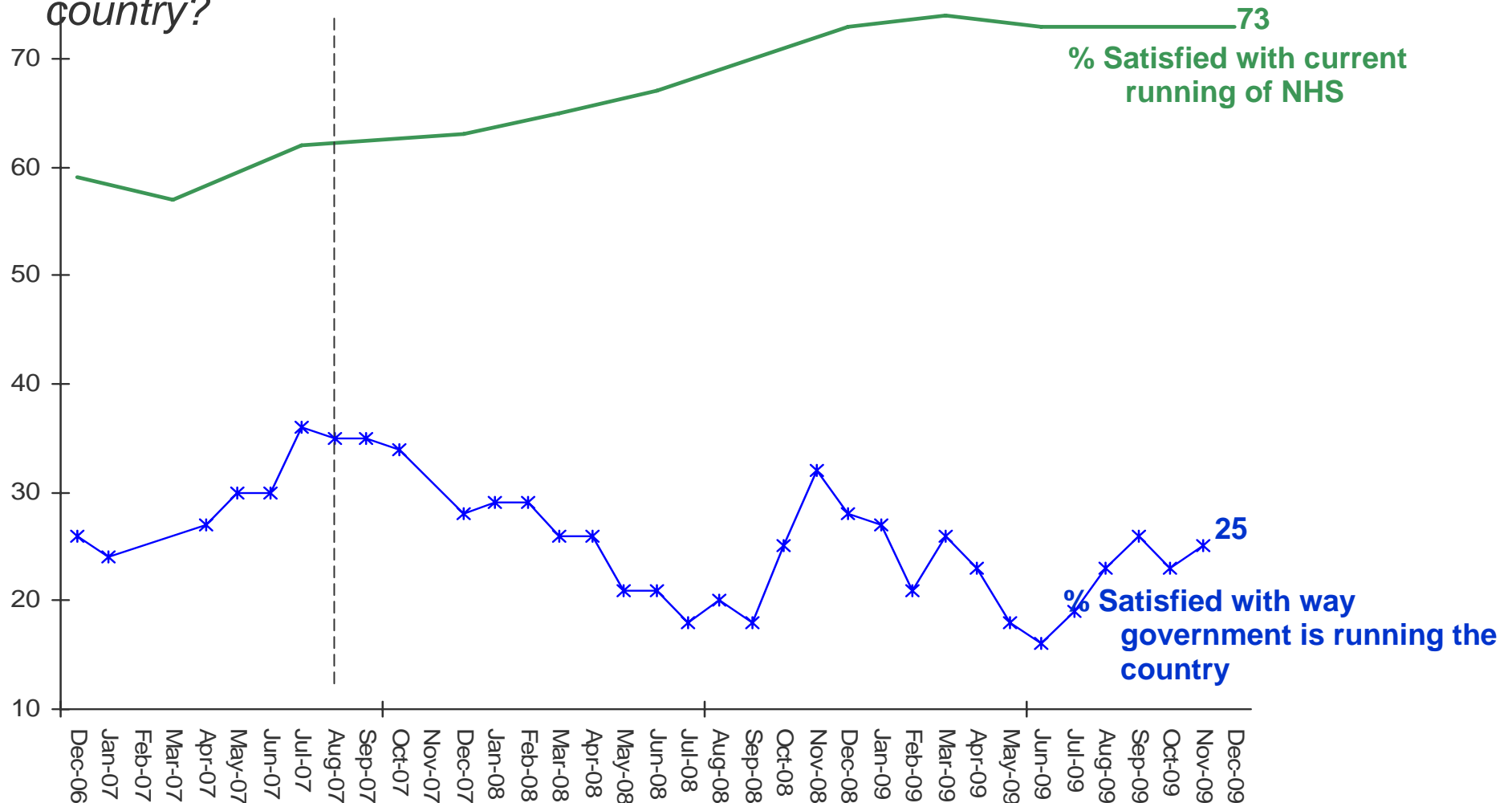
What do you see as the most/other important issues facing Britain today?



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

High satisfaction with NHS....

Overall, how satisfied or dissatisfied are you with the running of the National Health Service nowadays?
 Are you satisfied or dissatisfied with the way the Government is running the country?



Ipsos MORI

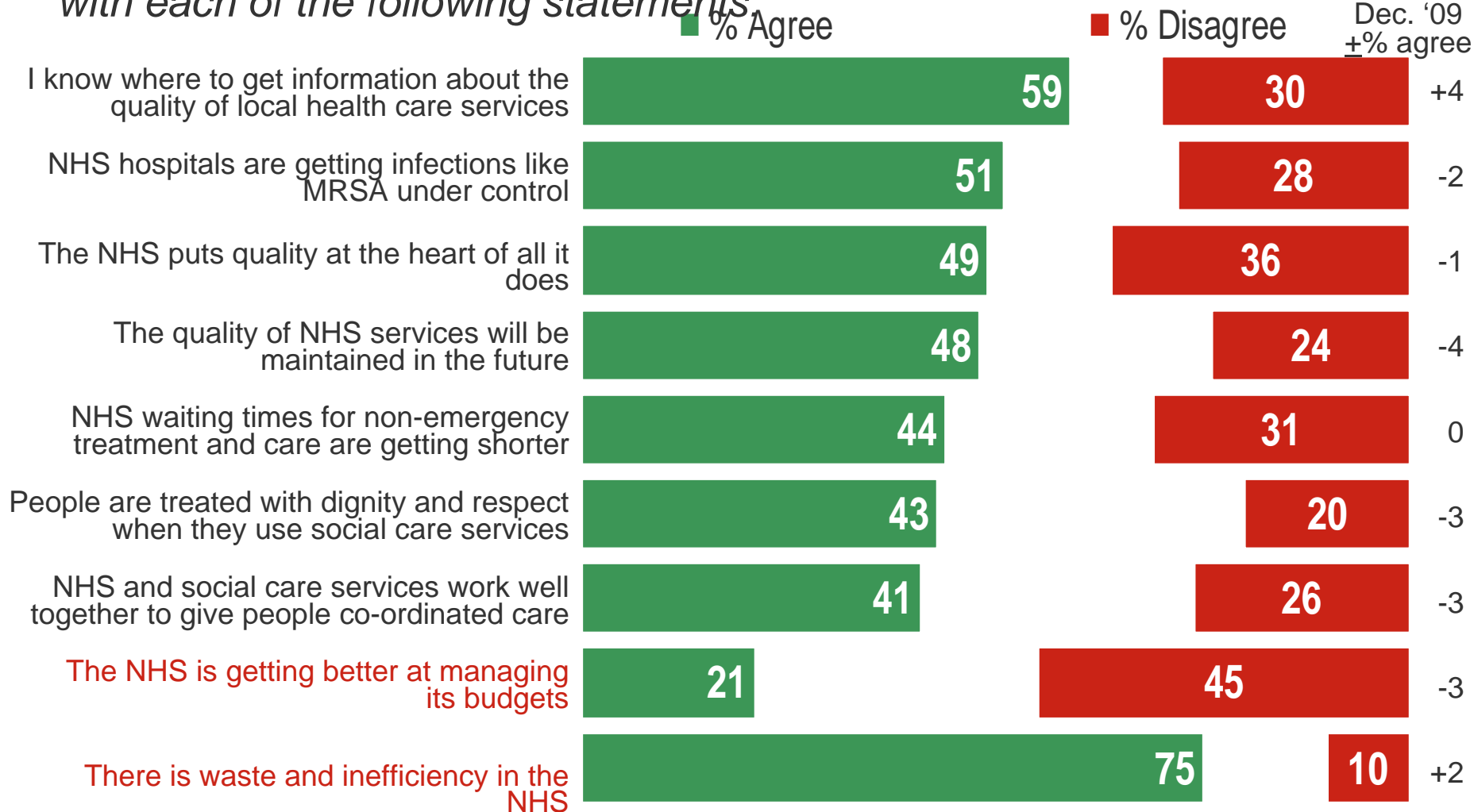
Source: Ipsos MORI/DH Public Perceptions of the NHS Tracker, Ipsos MORI Political Monitor

Base: NHS satisfaction – c. 1,000 English adults aged 16+ interviewed face-to-face per wave, Government satisfaction – c. 1,000 GB adults aged 18+ interviewed by telephone per wave (N.B interviewed face-to-face until June 2008)



More critical on....

Please tell me whether on the whole you agree or disagree with each of the following statements:



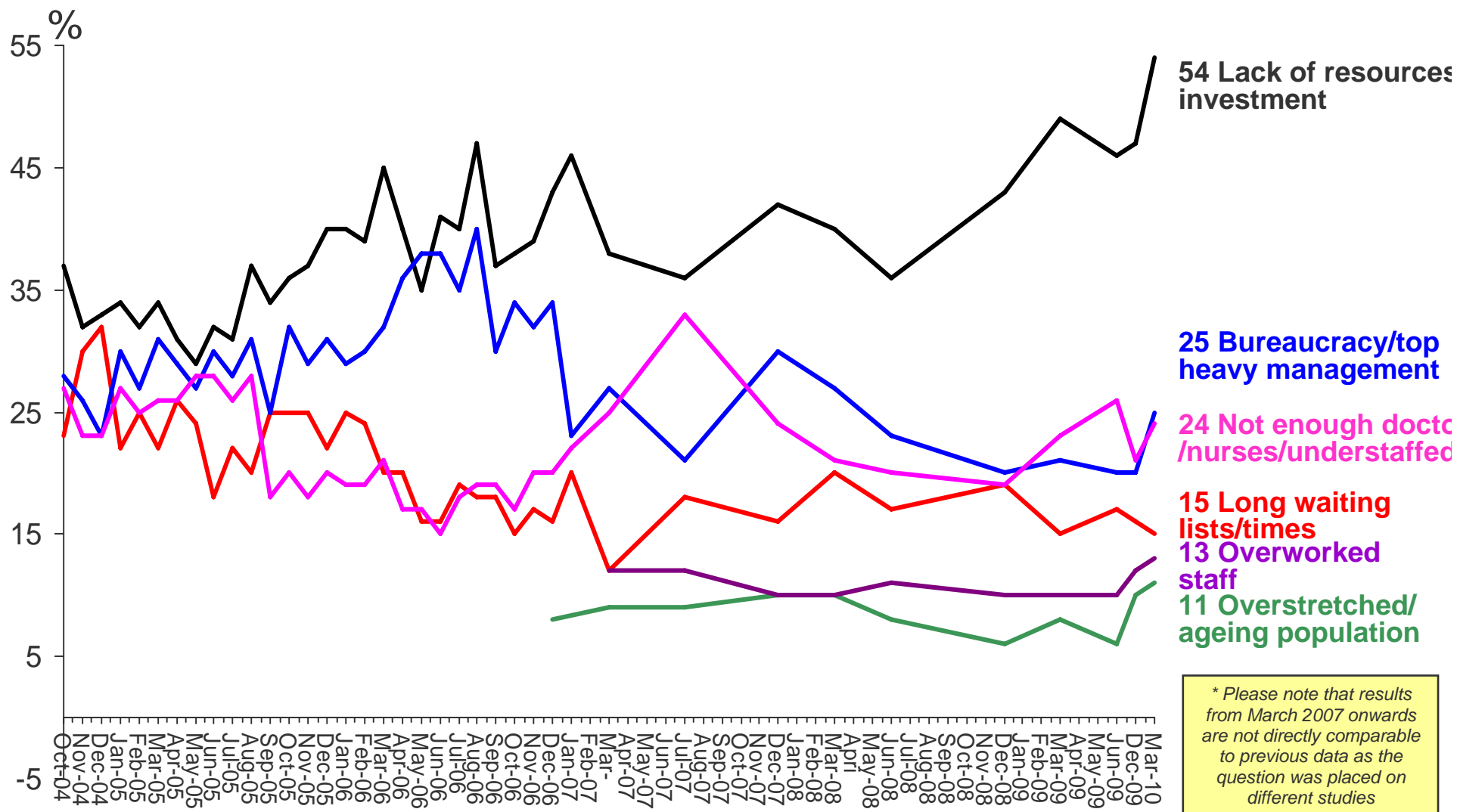
Base: 1,006 English adults aged 16+, March 2010
Ipsos MORI

Source: Ipsos MORI/DH Perceptions of the NHS Tracker



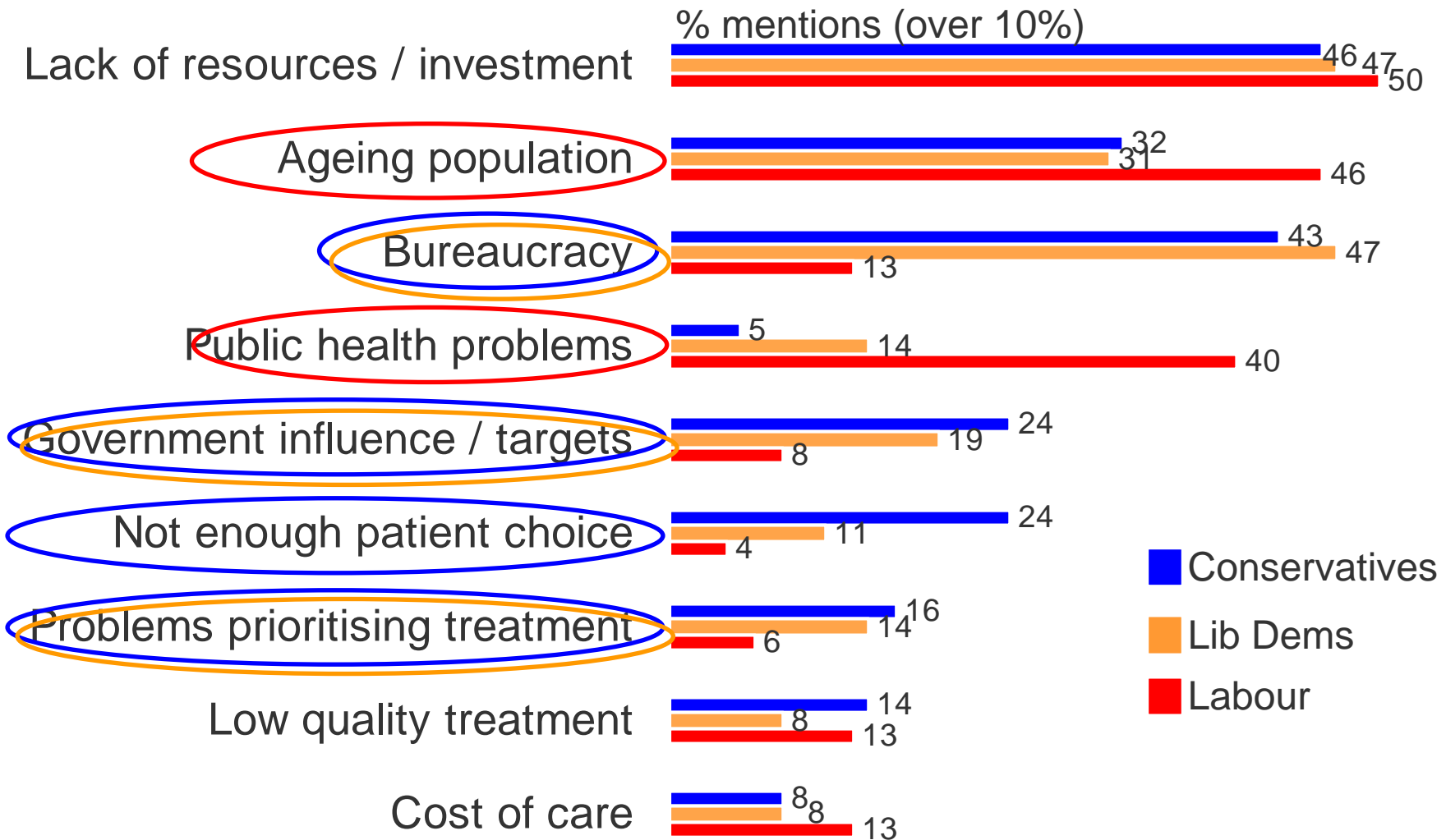
Biggest Problems facing the NHS – top 6

What do you see as the biggest problems facing the NHS? What else?



MPs in different parties see NHS problems very differently

What are the biggest problems facing the NHS?

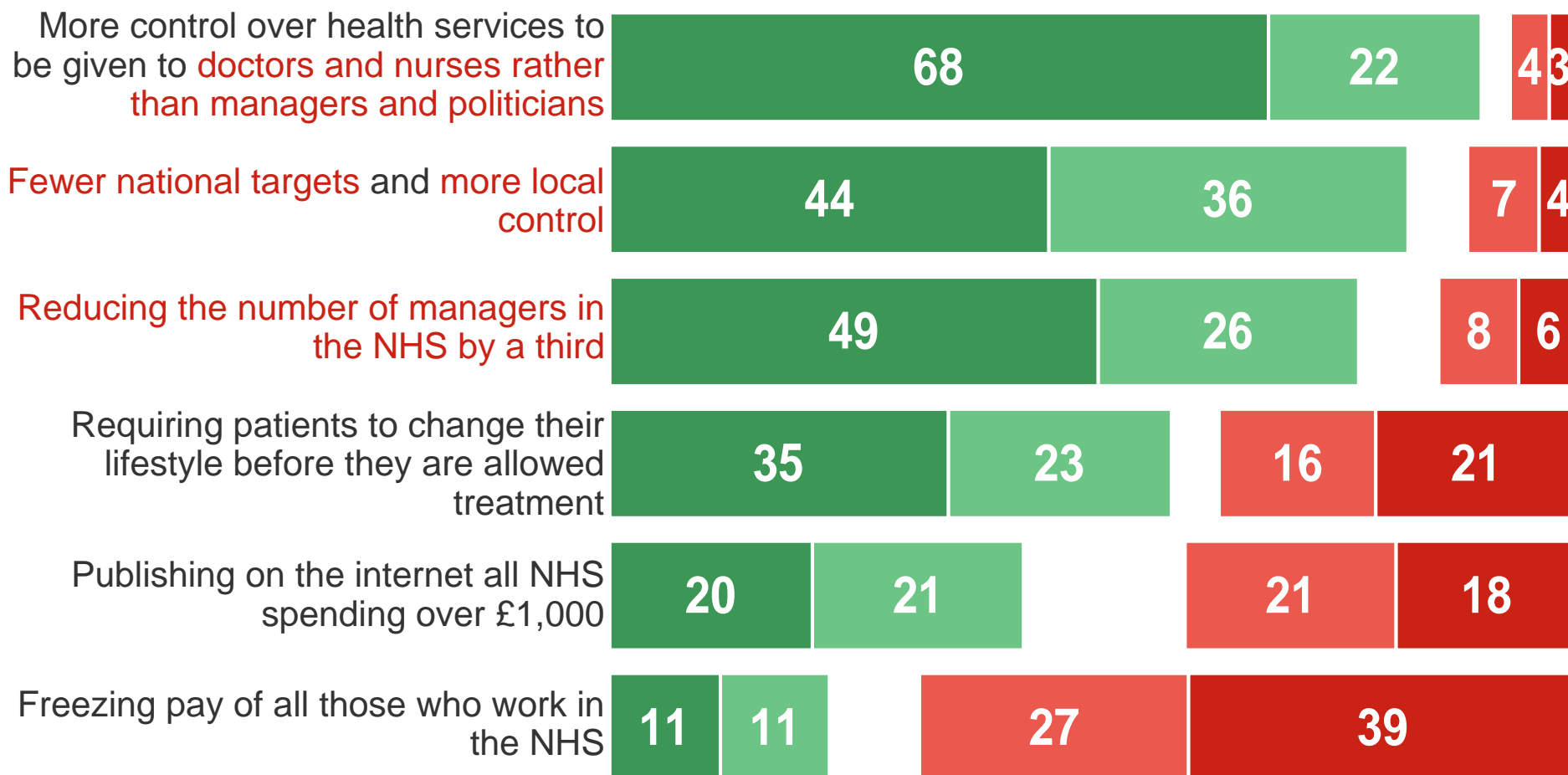


Base: 121 candidate MPs (37 Conservative, 48 Labour, 36 Lib Dem), February-March 2010

Conservative agenda plays well to the crowd

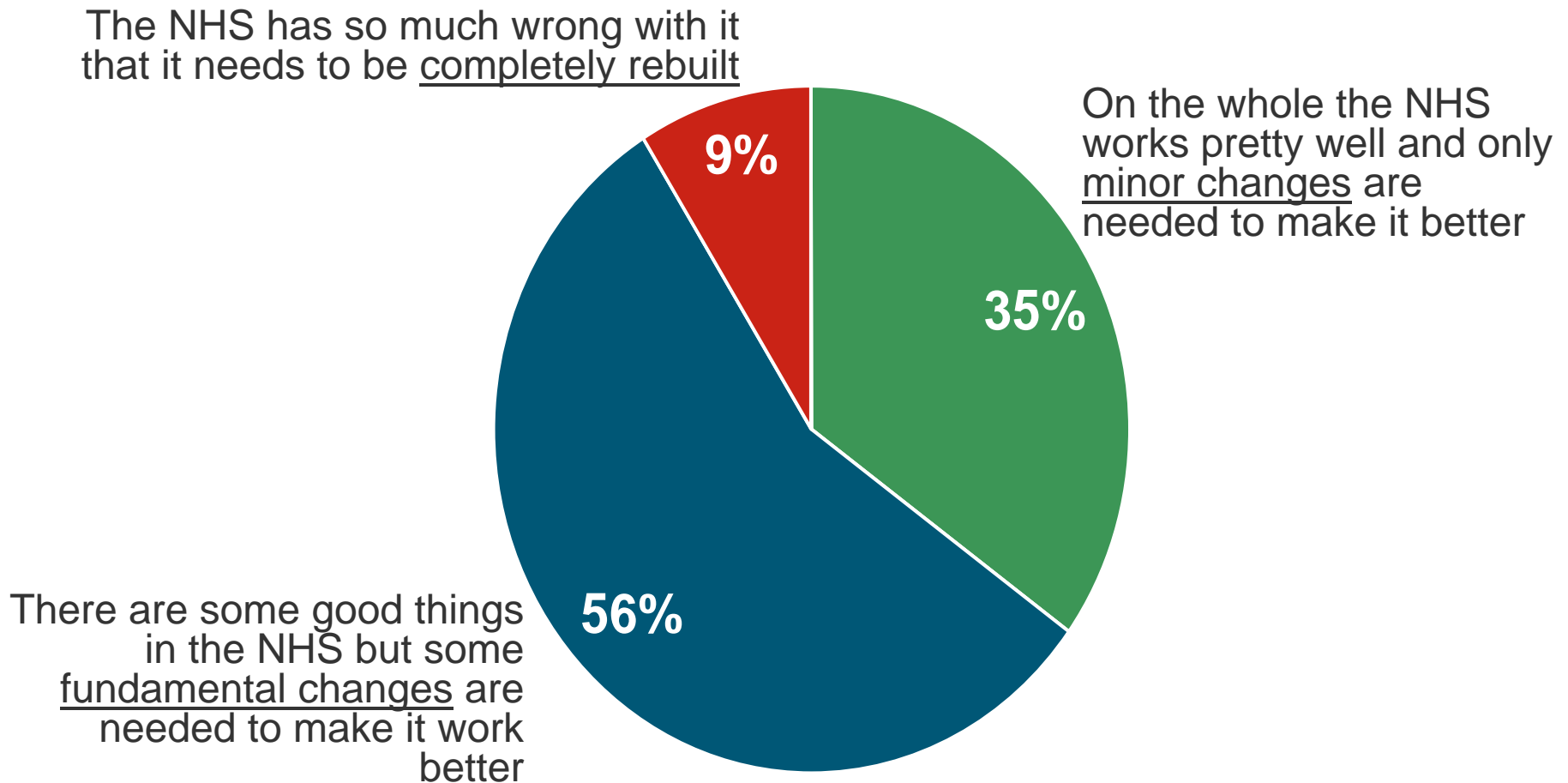
Please tell me how strongly you support or oppose each of these possible future changes for the National Health Service?

■ % Strongly support ■ % Tend to support ■ % Tend to oppose ■ % Strongly oppose



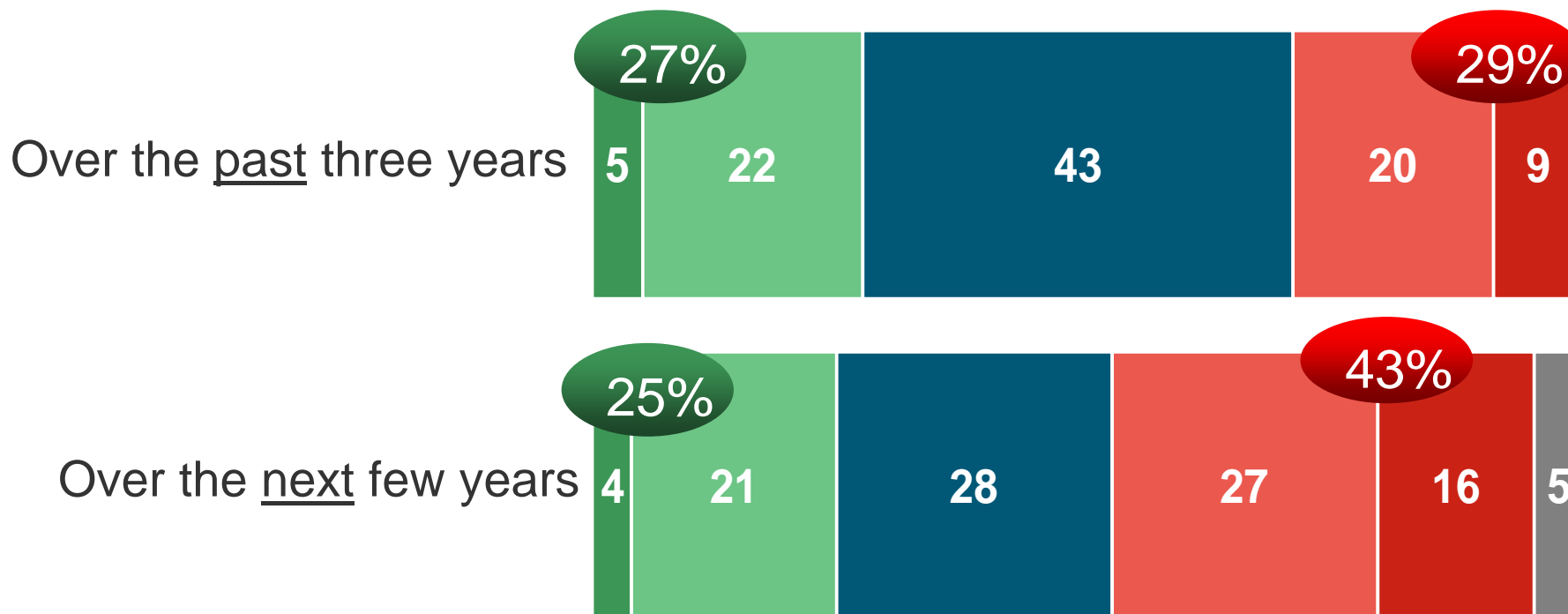
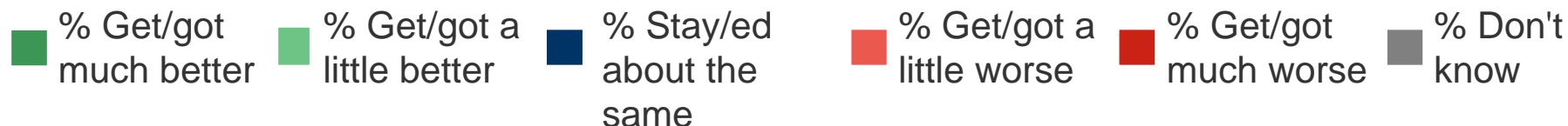
More than half think the NHS needs fundamental changes in order to make it work better

Q Which one of the following statements comes closest to reflecting your overall view of the NHS?



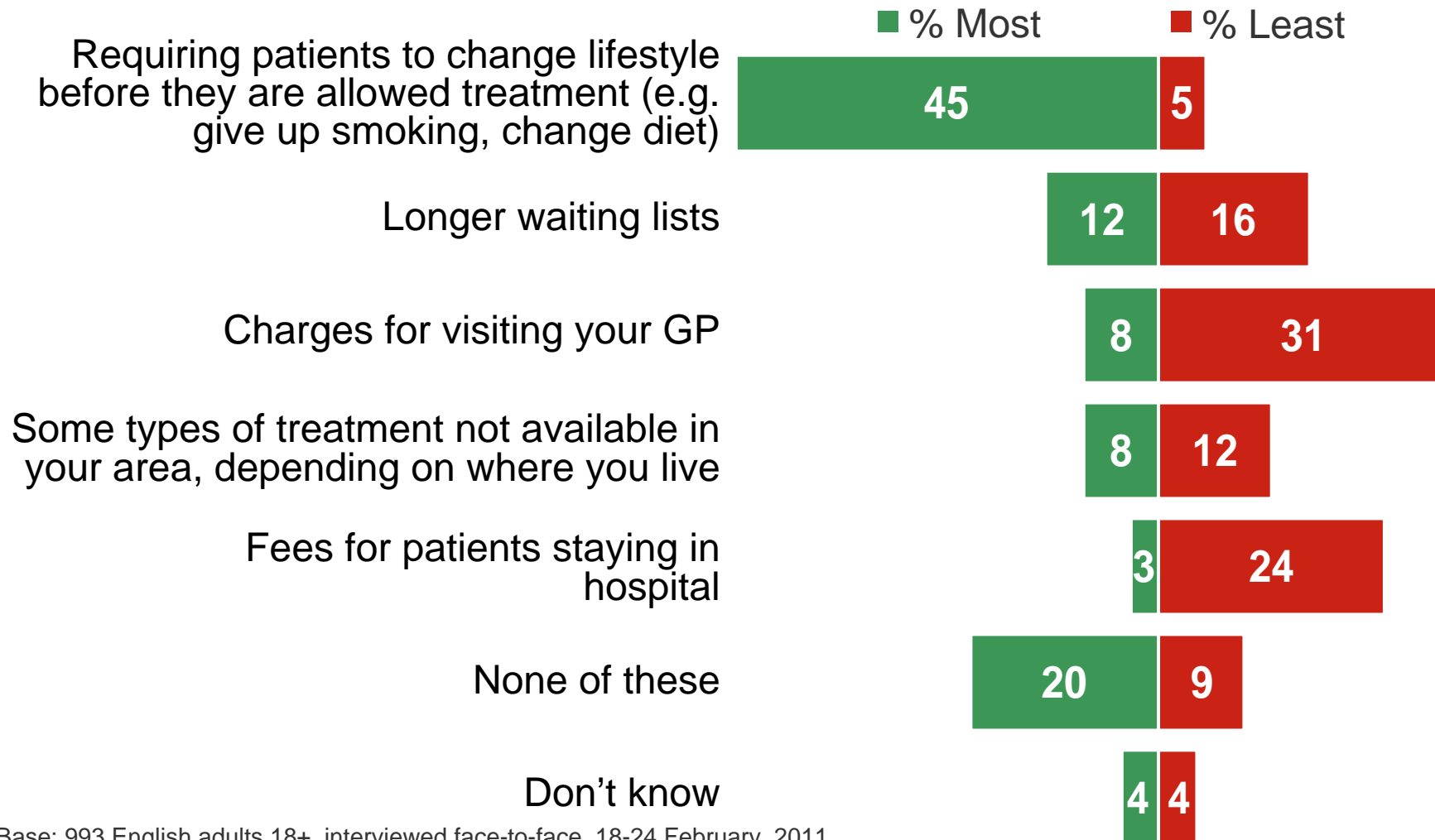
More expect NHS care to get worse rather than better in the next few years

Q Thinking about the quality of NHS care over the past three/next few years, has it/do you expect it to...?



Requiring patients to change lifestyles is more acceptable than longer waiting lists, GP charges and regional variation in available treatments

Q If the NHS was to face lower levels of spending, which of these, if any, would you be most/least willing to accept?



Base: 993 English adults 18+, interviewed face-to-face, 18-24 February, 2011

Ipsos MORI

Source: Ipsos MORI /Nuffield Trust

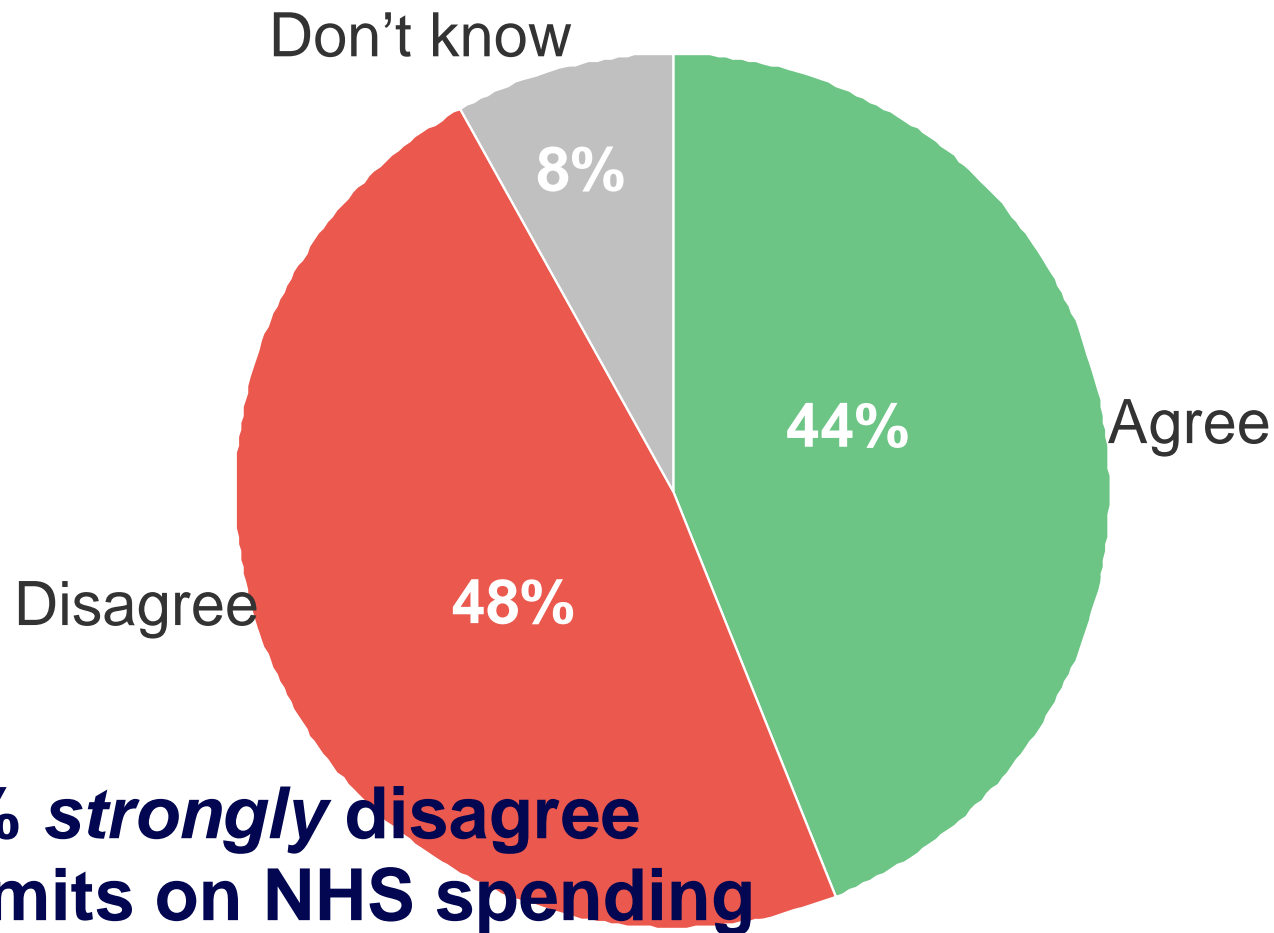


Coalition commitment
*“We will guarantee that health
spending increases in real terms”*

But expectations unrealistically high. People want ...

... unlimited spending...

There should always be limits on what is spent on the NHS...



Base: British public, 18+ (1,001) 12-17 January 2006

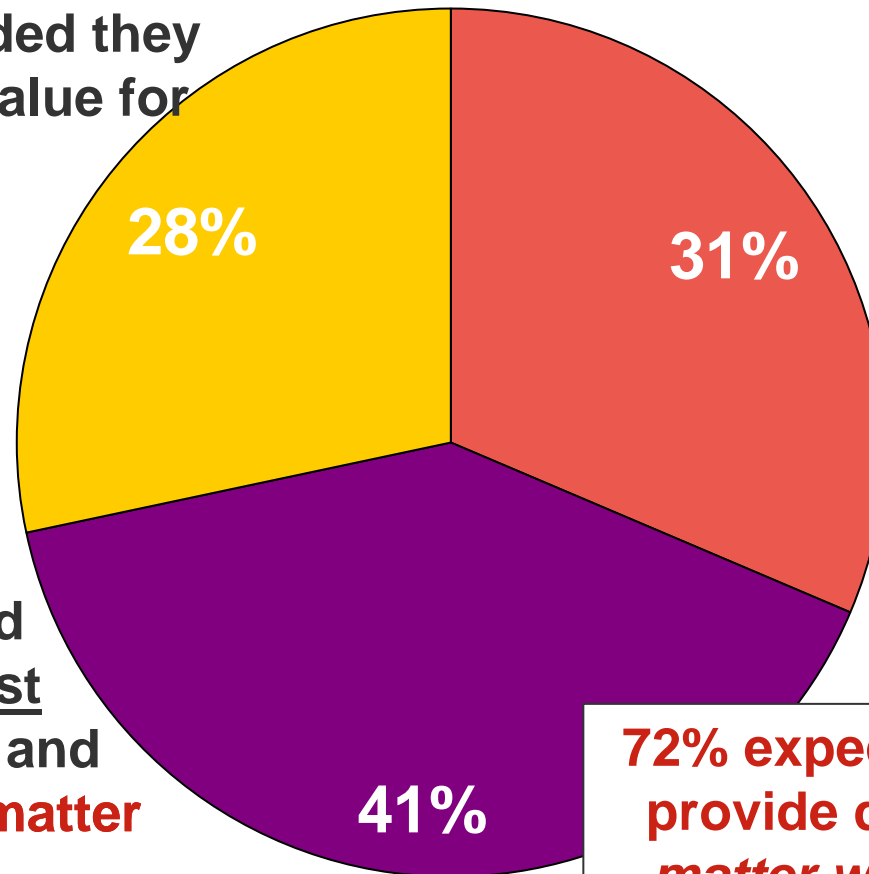
Ipsos MORI



... and little concern about value for money

The NHS should provide the most effective drugs and treatments provided they represent good value for money

The NHS should provide the most effective drugs and treatments **no matter what they cost**



The NHS should provide all drugs and treatments **no matter what they cost**

72% expect NHS to provide drugs *no matter what they cost*

Base: British public, 18+ (1,001) 12-17 January 2006

Ipsos MORI



The challenges



*"We now expect more of government than
we do of God"*

52% of the public agree....

Most agree that Britain should show the world it can live within its means

Please tell me how strongly you agree or disagree with each of these arguments about public services and public spending

■ Strongly agree ■ Tend to agree ■ Tend to disagree ■ Strongly disagree

It is important for Britain to show the world that it can live within its means



It is important for Britain to show the world that it can live within its means, even if that means big cuts to our public services



Base: 1,002 British adults 18+, split sample c.500 each. 18th-20th June 2010

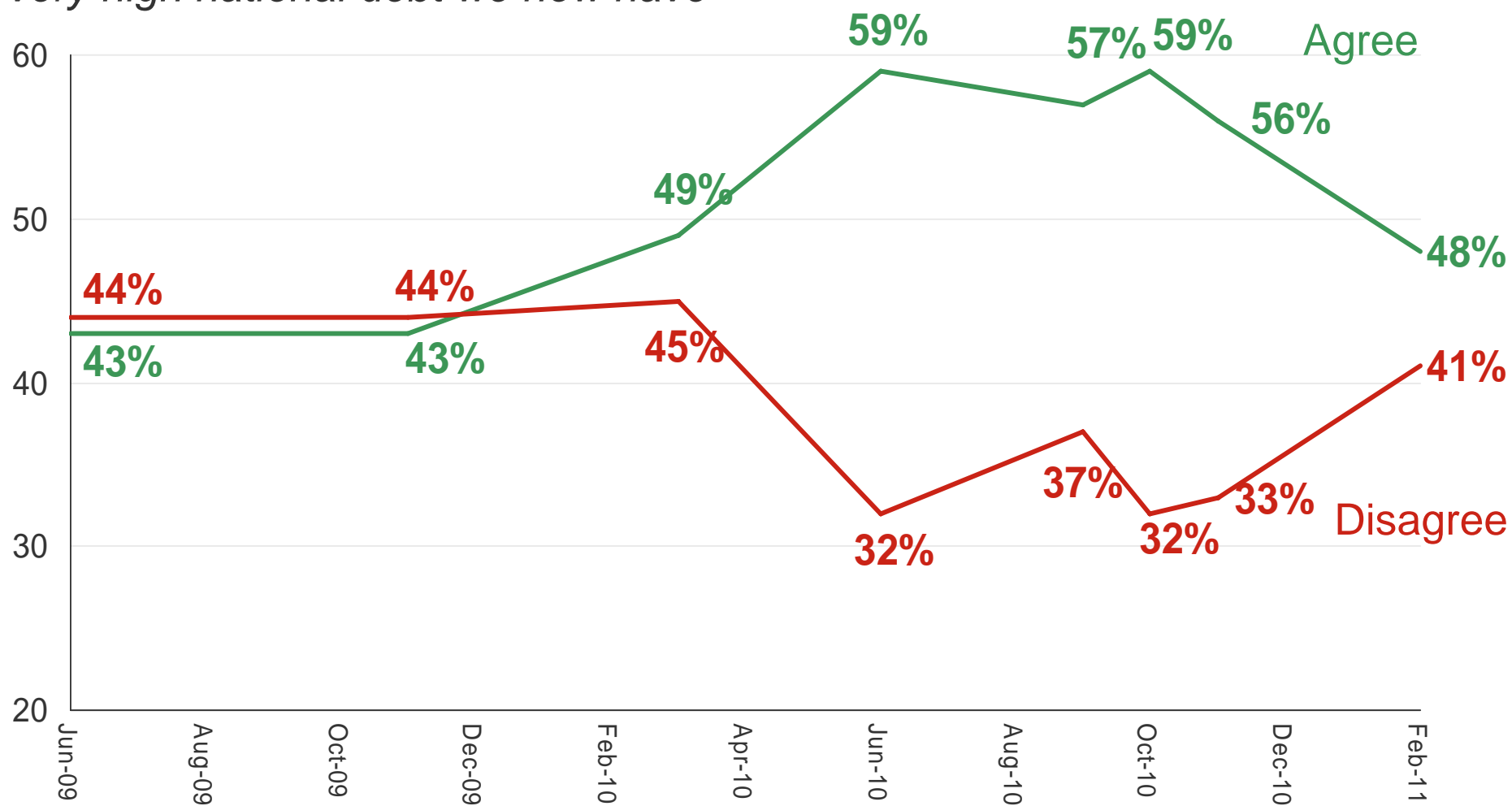
Ipsos MORI

Source: Ipsos MORI/Reuters Political Monitor



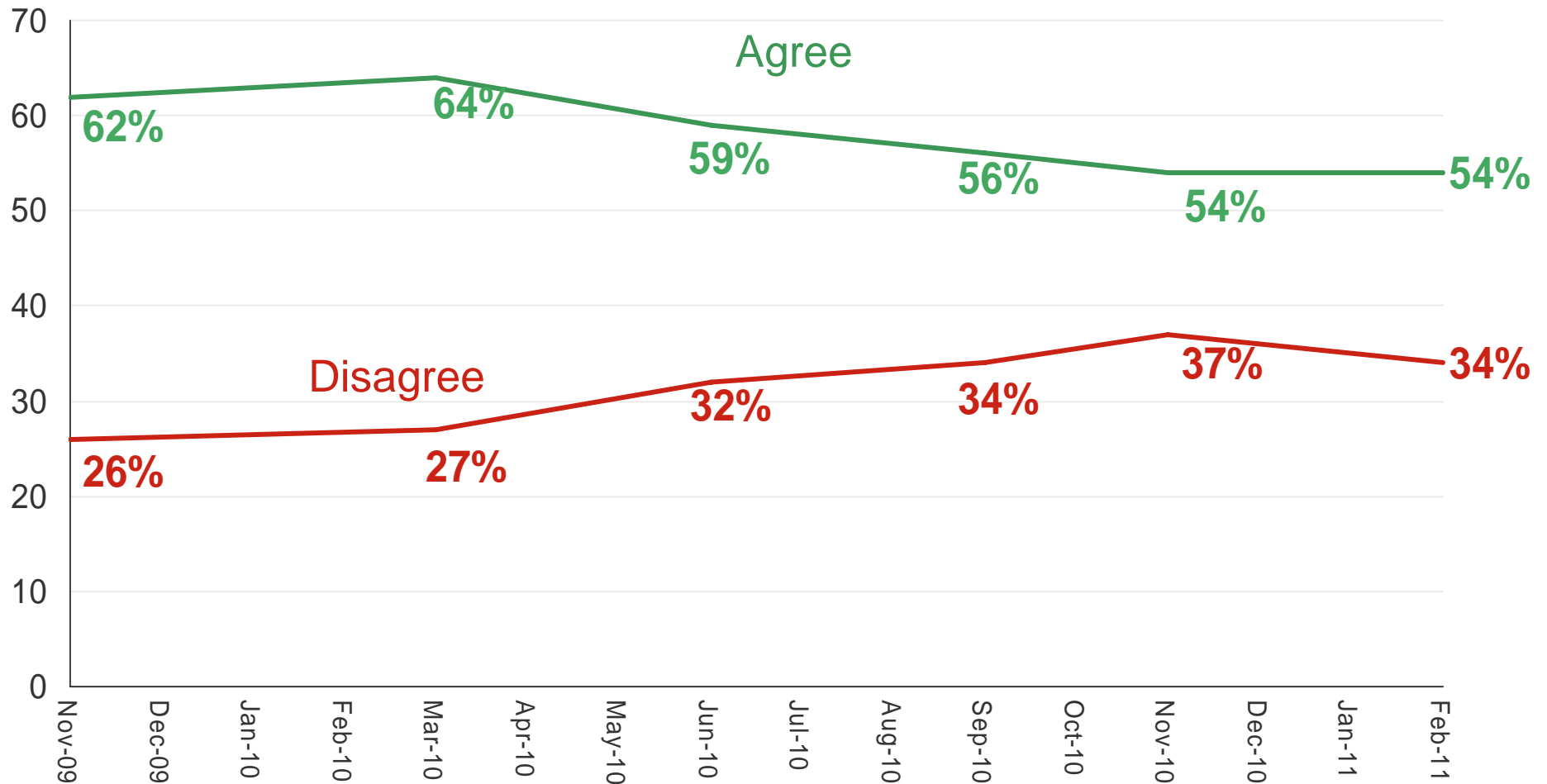
Decline in the public's acceptance of the need for public service cuts

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



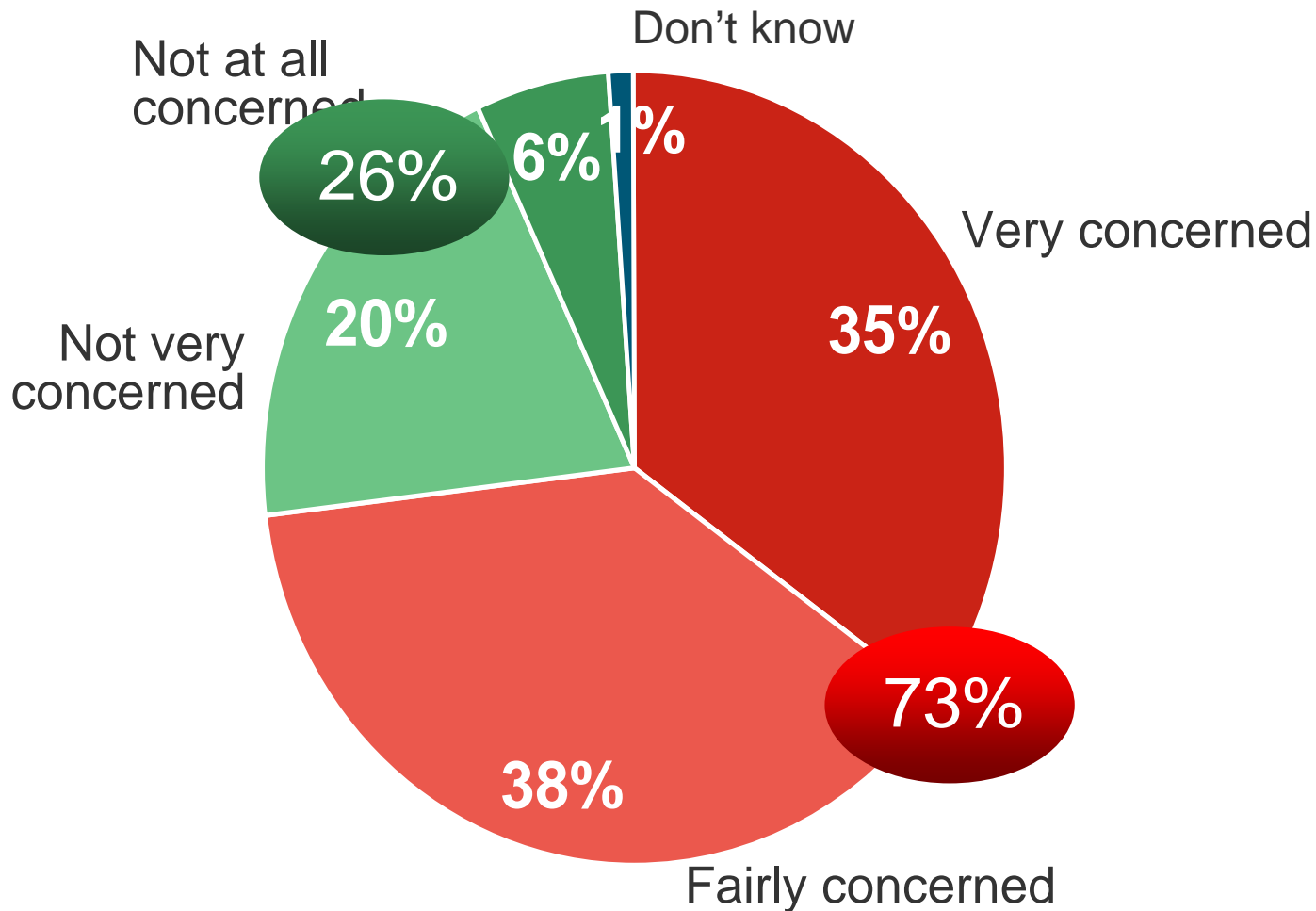
Most still think efficiency savings are enough to pay off national debt

Making public services more efficient can save enough money to pay off the very high national debt we now have, without damaging services the public receive



Three quarters are concerned about being hit by cuts in the next 12 months

And how concerned, if at all, are you about the effects of the cuts on you and your family in the next 12 months?



Base: 1,002 British adults 18+, 18th - 20th February 2011

Ipsos MORI

Source: Reuters/Ipsos MORI Political Monitor



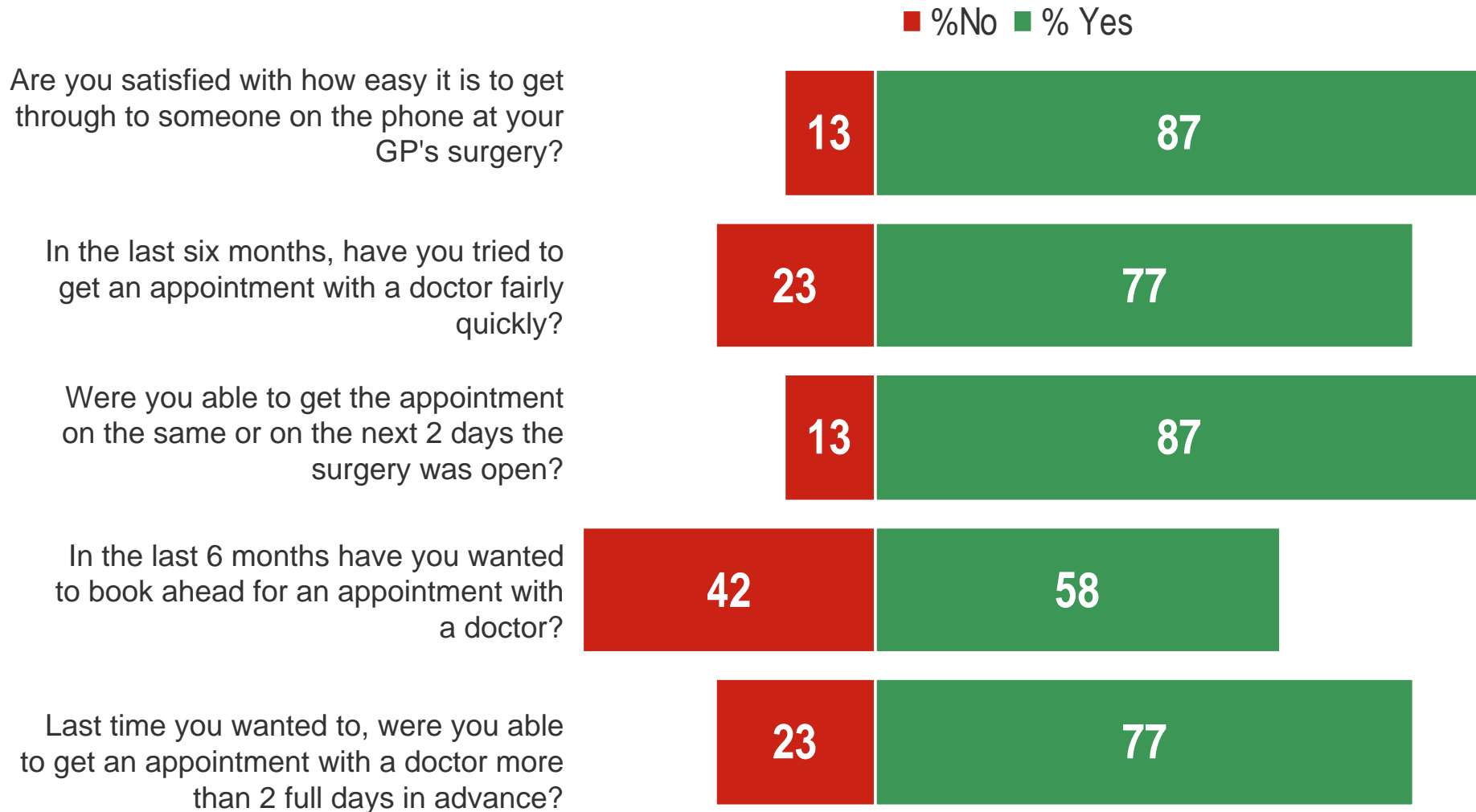
Coalition commitments

“We will ... incentivise ways of improving access to primary care in disadvantaged areas”

“We will give every patient the power to choose any healthcare provider that meets NHS standards within NHS prices”

“We will publish detailed data about the performance of healthcare providers online, so everyone will know who is providing a good service and who is falling behind”

Patients satisfied with ease of access to GP

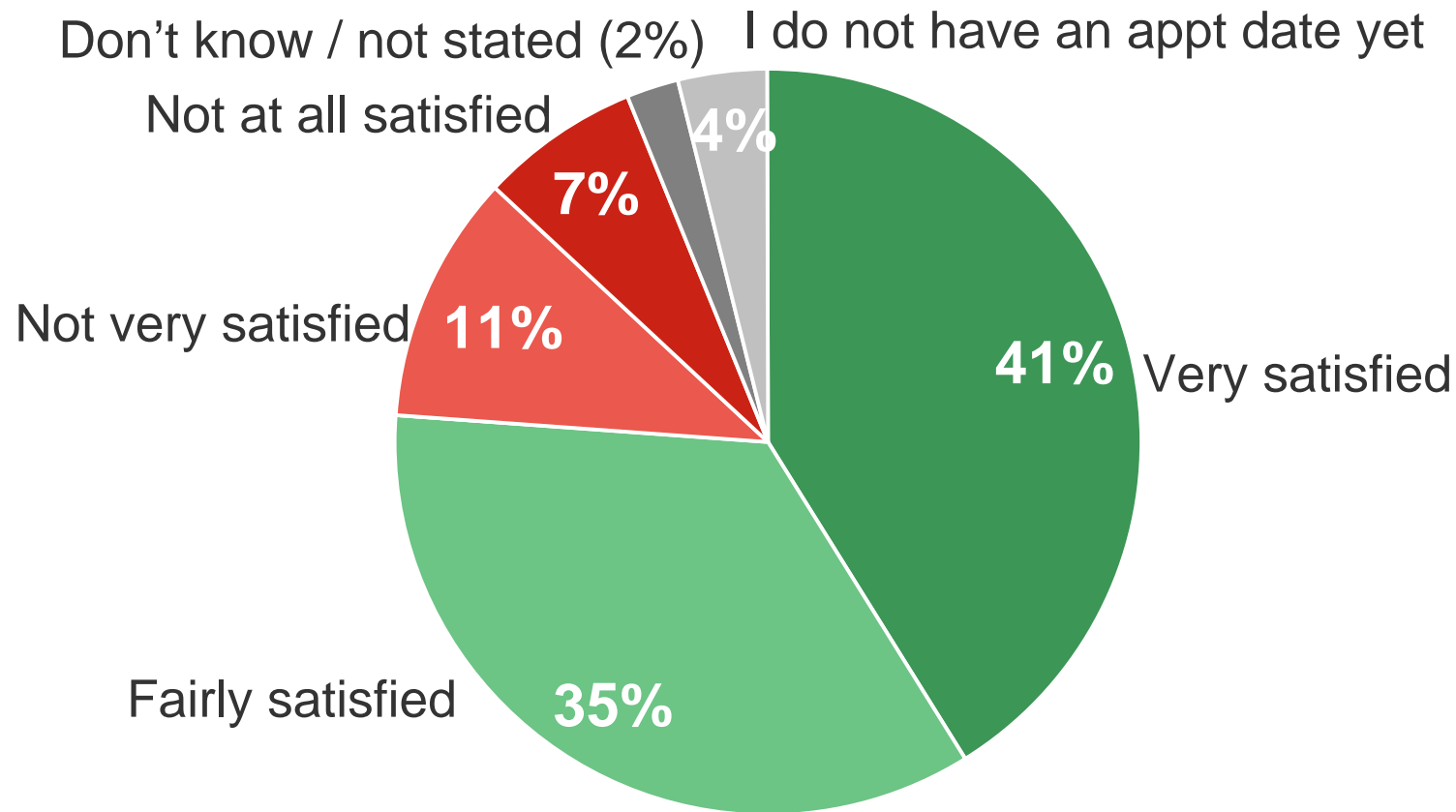


Base: 1 (1,351,886); 2 (1,012,334); 3 (1,329,542); 4 (1,317,279) 5 (747,599)

Source: Ipsos MORI/DH GPPS 2008

Majority of inpatients/outpatients satisfied with waiting times

How satisfied or dissatisfied were you with how long you had to wait from the time your GP referred you to a hospital to when you actually saw the hospital specialist?



Base: 93,217 English inpatients/outpatients, March-May 2009

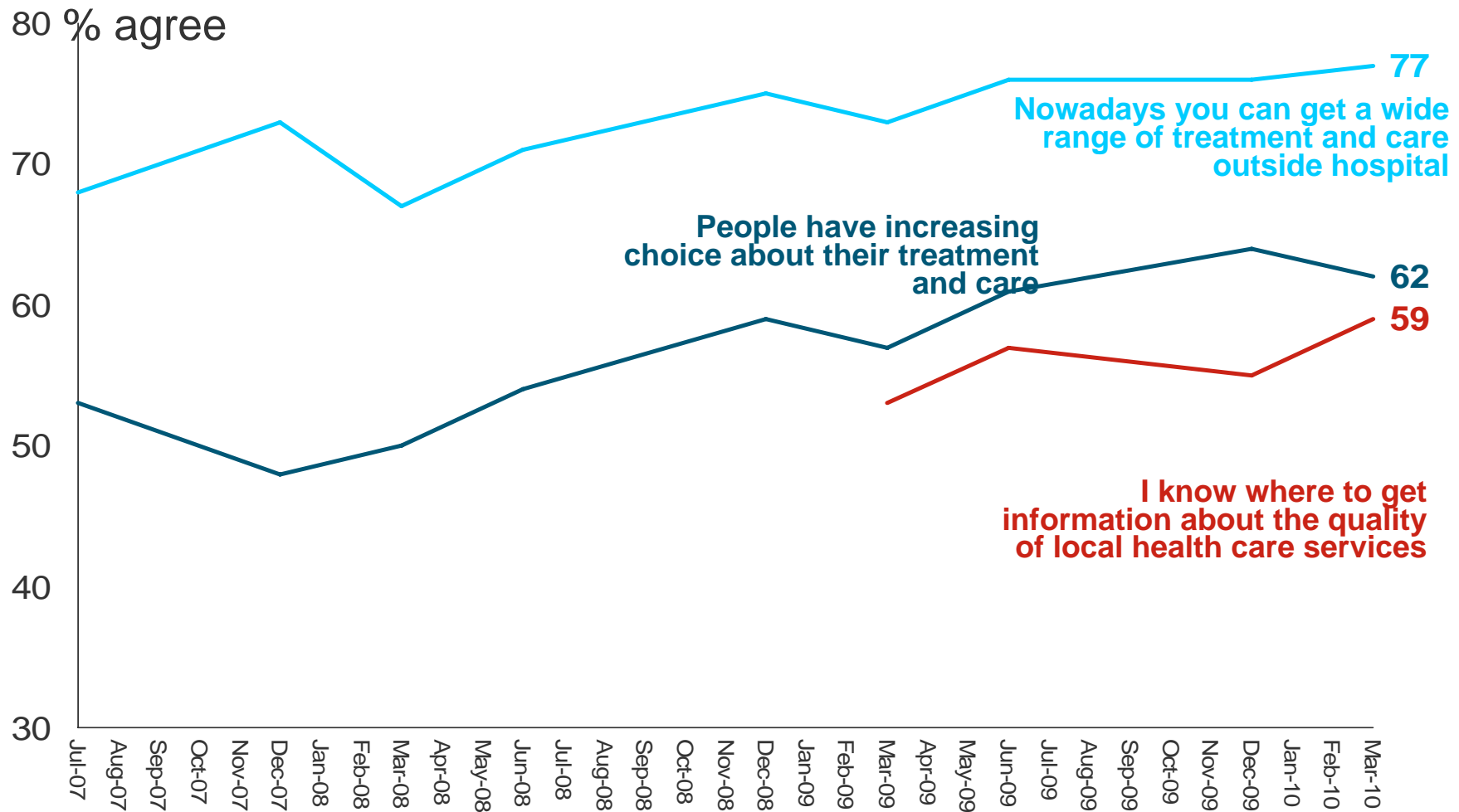
Source: Ipsos MORI / DH National Patient Choice Survey



Increasing awareness of choice

The public are increasingly aware of choice inside and outside the NHS

Please tell me whether on the whole you agree or disagree with each of the following statements:



Base: 1,006 English adults aged 16+, March 2010

*statement not asked in Dec 08, March 09, June 09

Ipsos MORI

Source: Ipsos MORI/DH Perceptions of the NHS Tracker

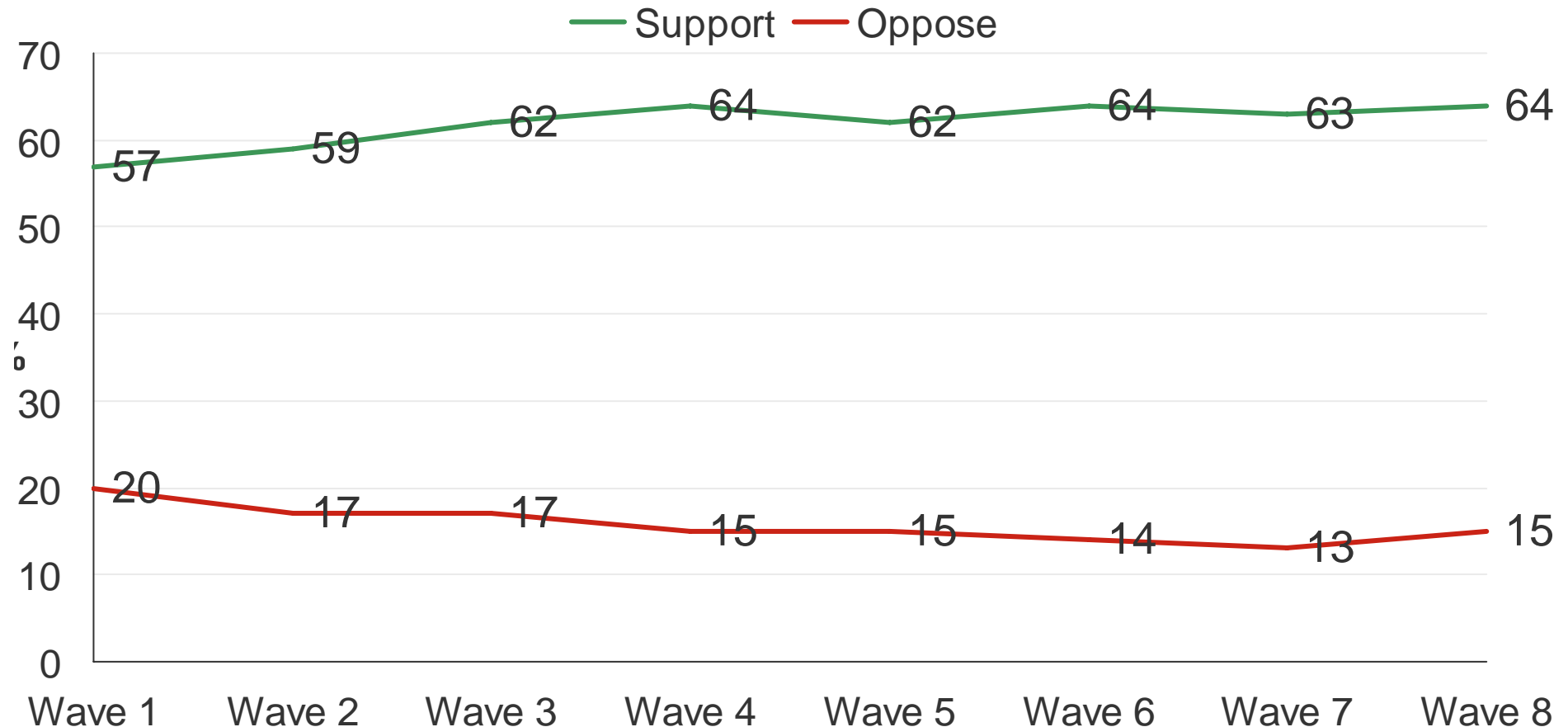


Coalition commitment

“We will strengthen the power of GPs ... by enabling them to commission care”

Support for PBC among GPs

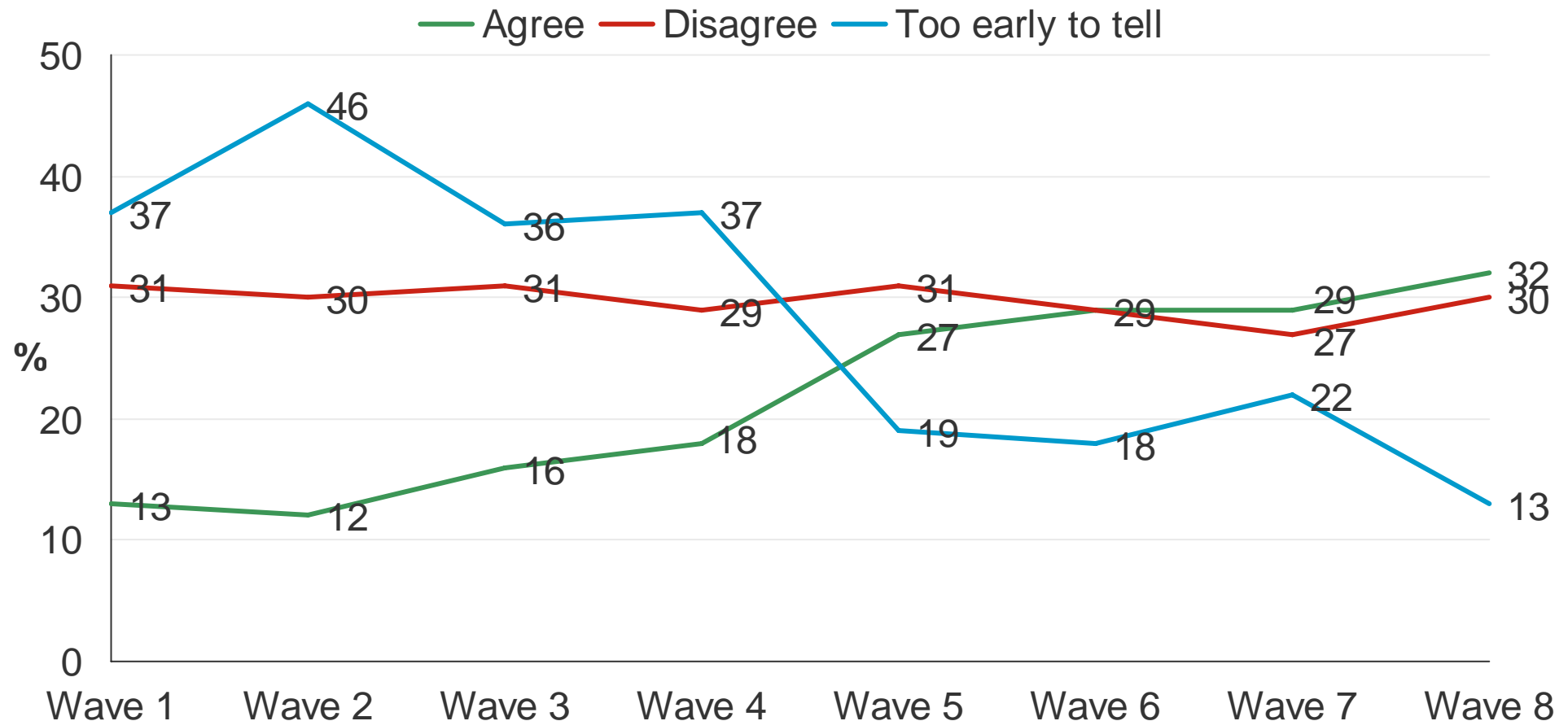
In general, to what extent do you support or oppose Practice Based Commissioning (PBC) as a policy?



Base: Wave 8: 1,698 practices (3 June – 28 August 2009); Wave 7: 1,797 practices (3 April - 5 June 2009); Wave 6: 1,898 practices (1 December 2008 - 27 February 2009); Wave 5: 1,833 practices (19 September - 16 November 2008); Wave 4: 1,891 practices (2 June - 5 August 2008); Wave 3: 1,988 practices (15 Jan - 7 March 2008); Wave 2: 1,398 practices (10 Sept - 23 Nov 2007) and Wave 1: 1,198 practices (18 June - 06 Aug 2007)

Has PBC improved patient care acc to GPs??

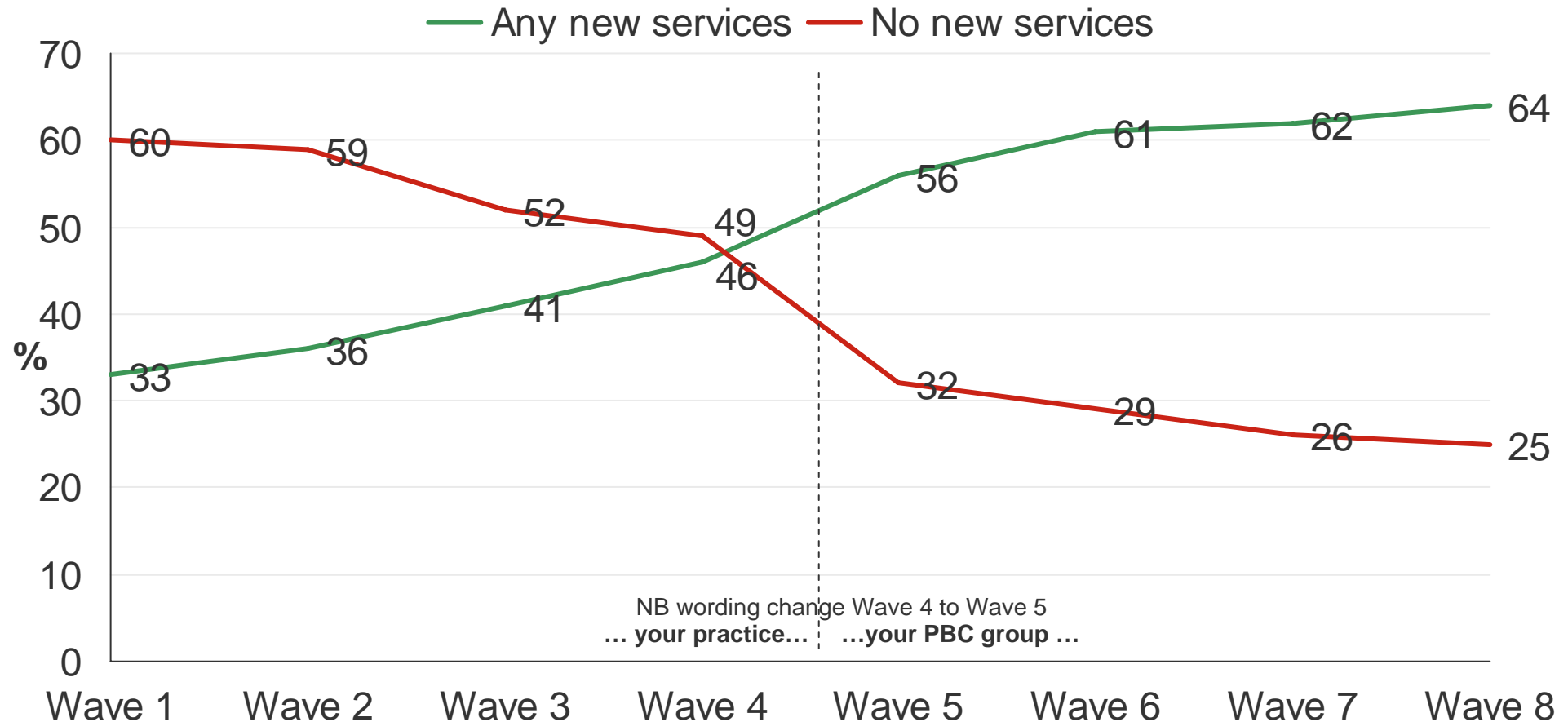
To what extent do you agree or disagree that PBC has improved patient care?



Base: Wave 8: 1,698 practices (3 June – 28 August 2009); Wave 7: 1,797practices (3 April - 5 June 2009; Wave 6: 1,898 practices (1 December 2008 - 27 February 2009); Wave 5: 1,833 practices (19 September - 16 November 2008); Wave 4: 1,891 practices (2 June - 5 August 2008); Wave 3: 1,988 practices (15 Jan - 7 March 2008); Wave 2: 1,398 practices (10 Sept - 23 Nov 2007) and Wave 1: 1,198 practices (18 June - 06 Aug 2007)

New services?

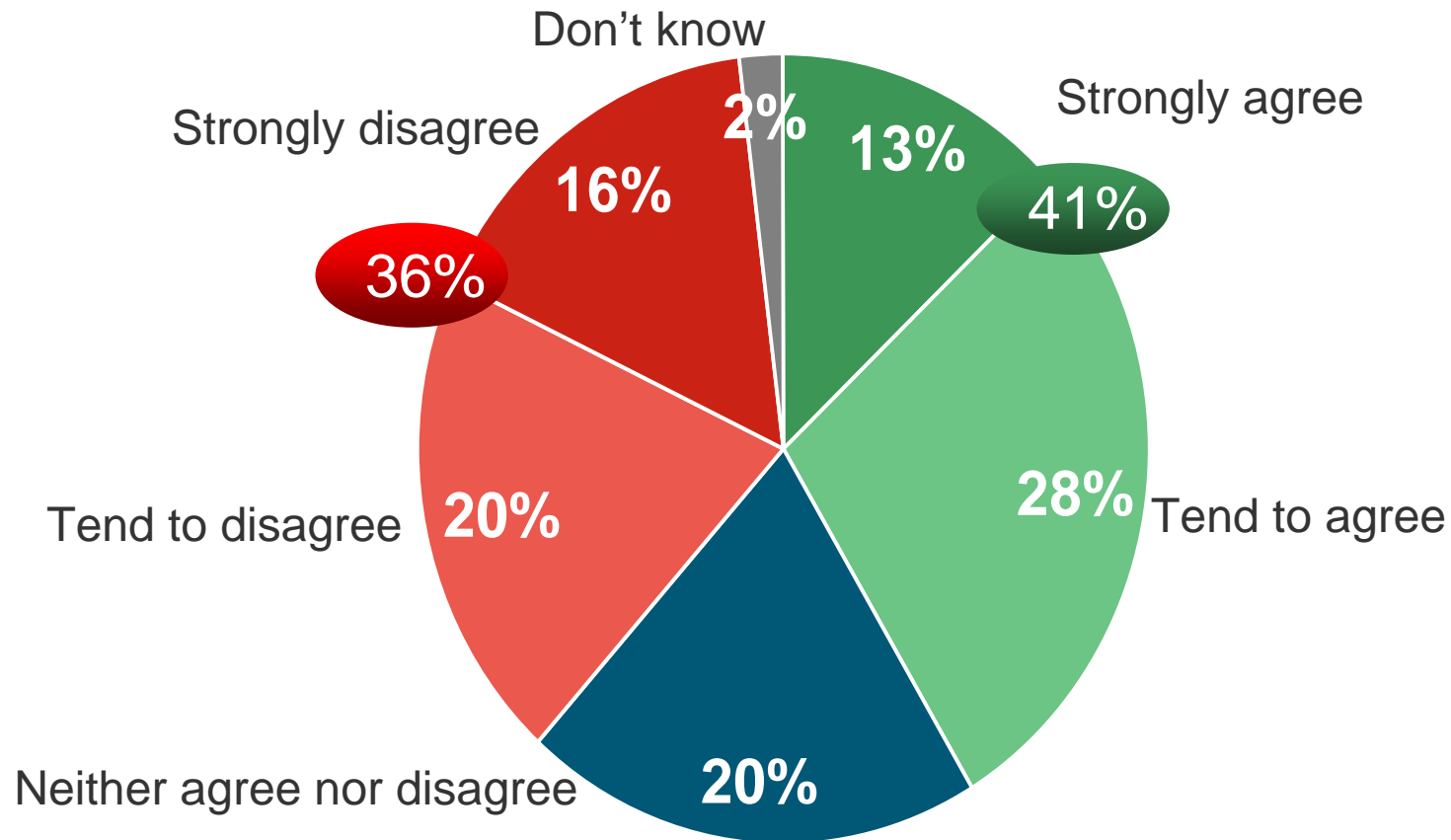
How many new services, if any, has your practice or PBC group commissioned as a direct result of PBC?



Base: Wave 8: 1,698 practices (3 June – 28 August 2009); Wave 7: 1,797 practices (3 April 5 - June 2009); Wave 6: 1,898 practices (1 December 2008 - 27 February 2009); Wave 5: 1,833 practices (19 September - 16 November 2008); Wave 4: 1,891 practices (2 June - 5 August 2008); Wave 3: 1,988 practices (15 Jan - 7 March 2008); Wave 2: 1,398 practices (10 Sept - 23 Nov 2007) and Wave 1: 1,198 practices (18 June - 06 Aug 2007)

Two in five don't mind who provides health services as long as they are free of charge

Q To what extent do you agree or disagree with the following statement: "As long as health services are free of charge, it doesn't matter to me whether they are provided by the NHS or a private company"



Base: 993 English adults 18+, interviewed face-to-face, 18-24 February, 2011

Ipsos MORI

Source: Ipsos MORI /Nuffield Trust



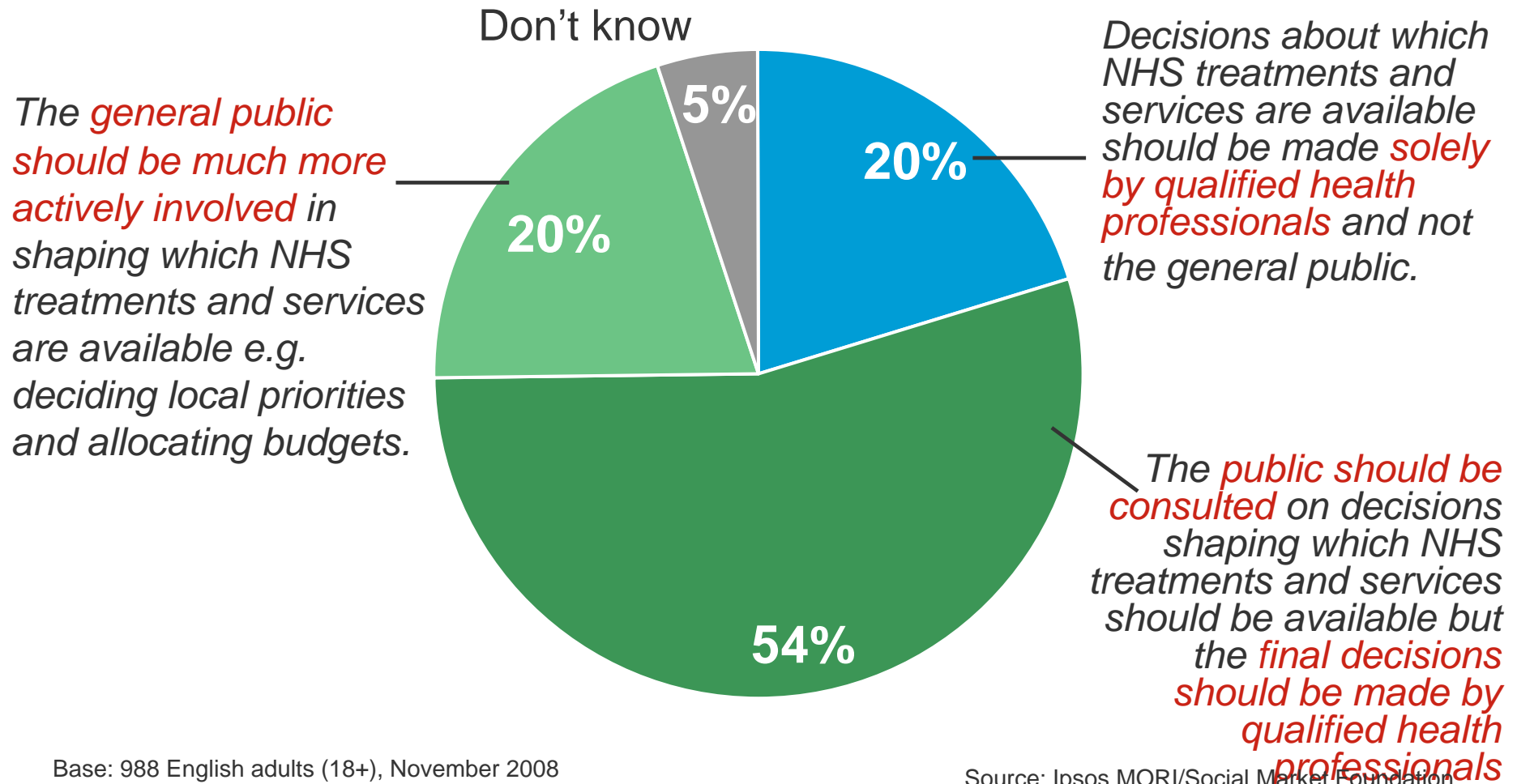
Coalition commitments

“We will ensure there is a stronger voice for patients locally through directly elected individuals on the boards of their local PCT”

“The local PCT will act as champion for patients”

The public say they want to be consulted

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

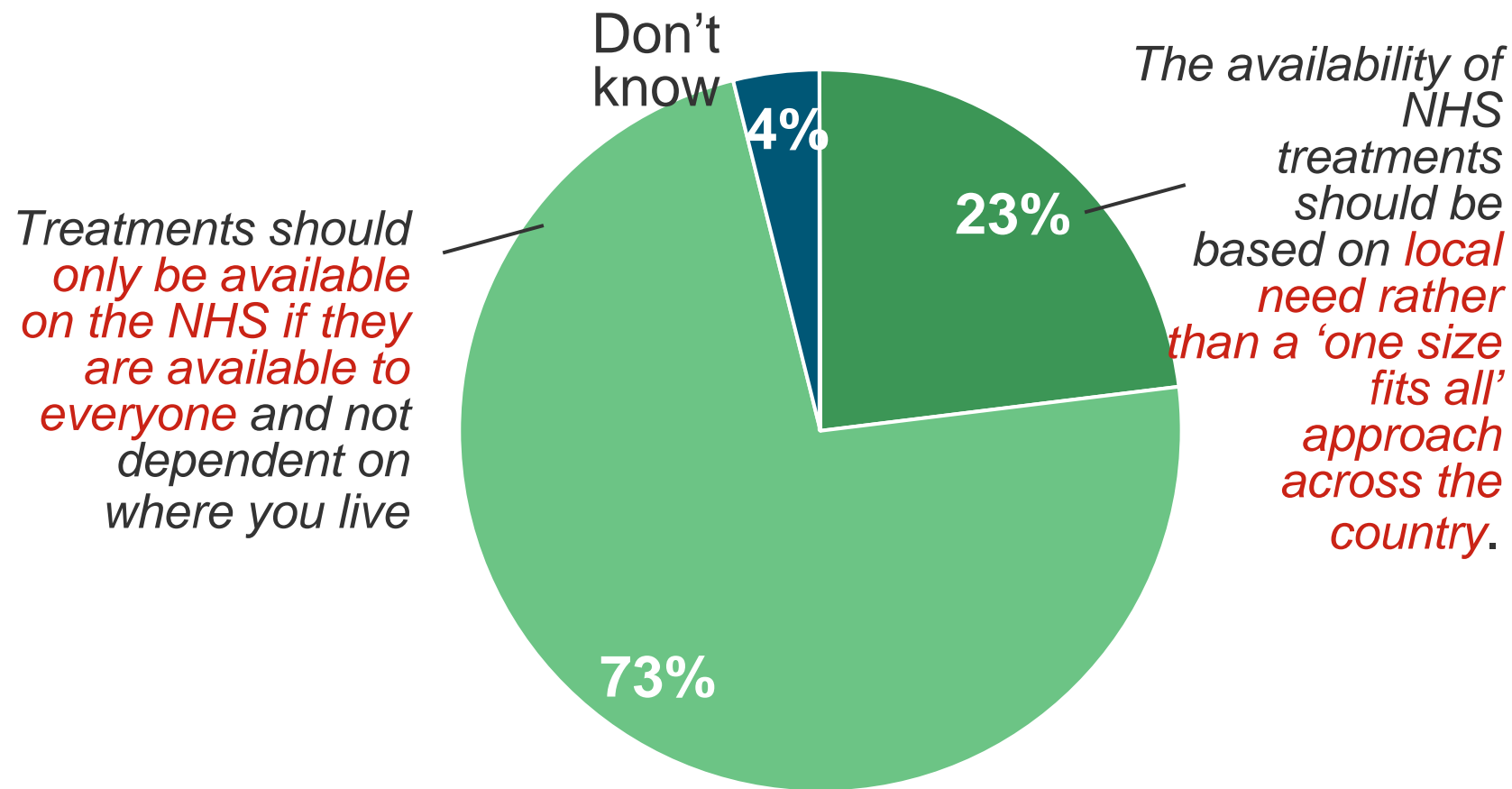


Base: 988 English adults (18+), November 2008

Source: Ipsos MORI/Social Market Foundation

Most want standard treatment available across the country

And thinking of the treatments that are available on the NHS, which of these statements most closely matches your opinion?

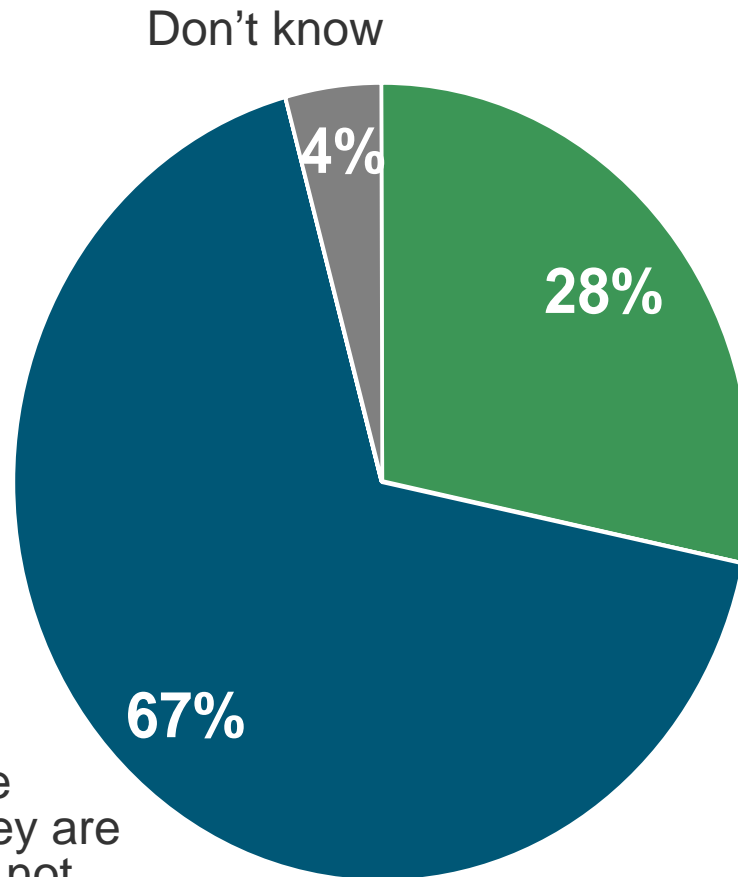


Base: 988 English adults (18+), November 2008

Source: Ipsos MORI/Social Market Foundation

Two thirds think treatments should be available to everyone – and not just based on local need

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



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

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

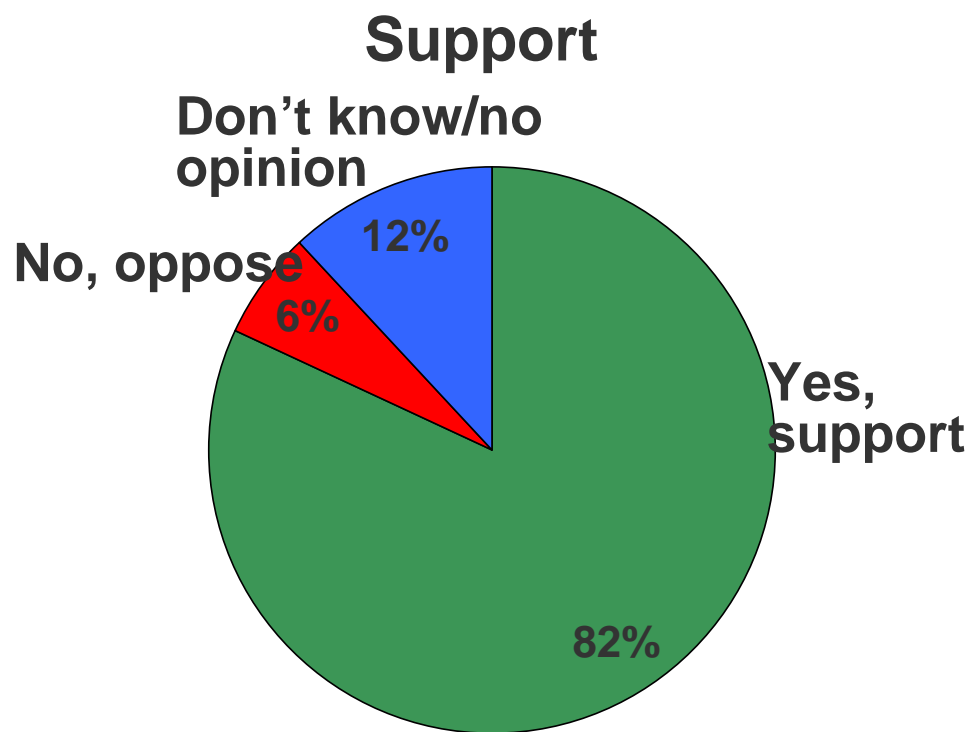
Source: Ipsos MORI /Nuffield Trust



Big support for getting involved – though in practice...

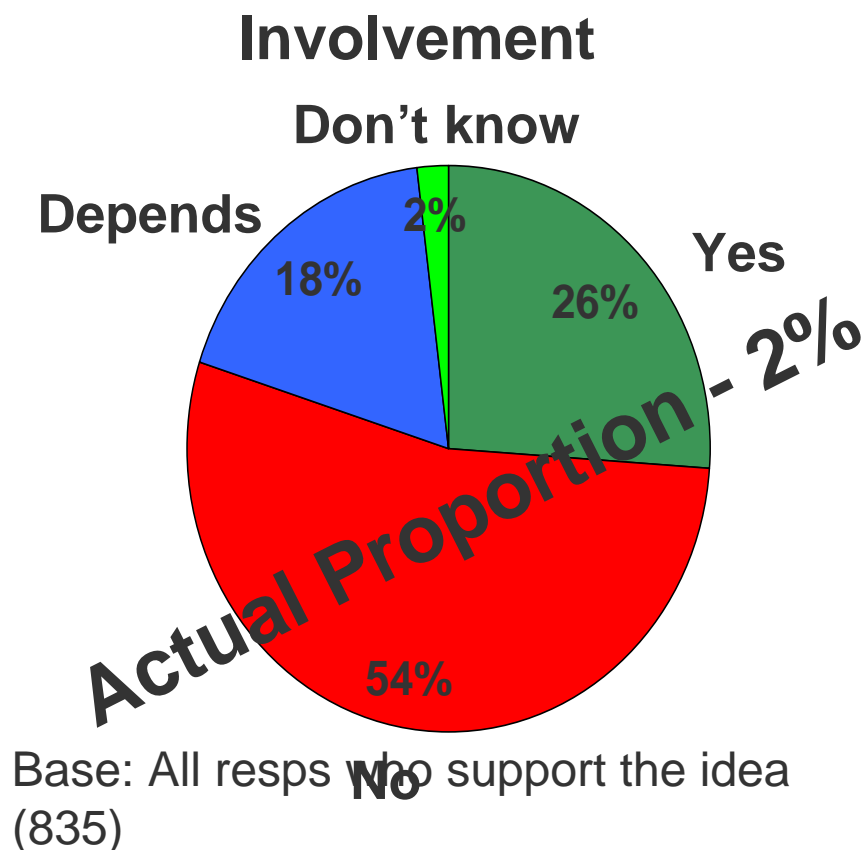
In principle, would you support or oppose *extending Community Partnerships* to other parts of the Borough?

And would you *personally be interested* in getting involved?



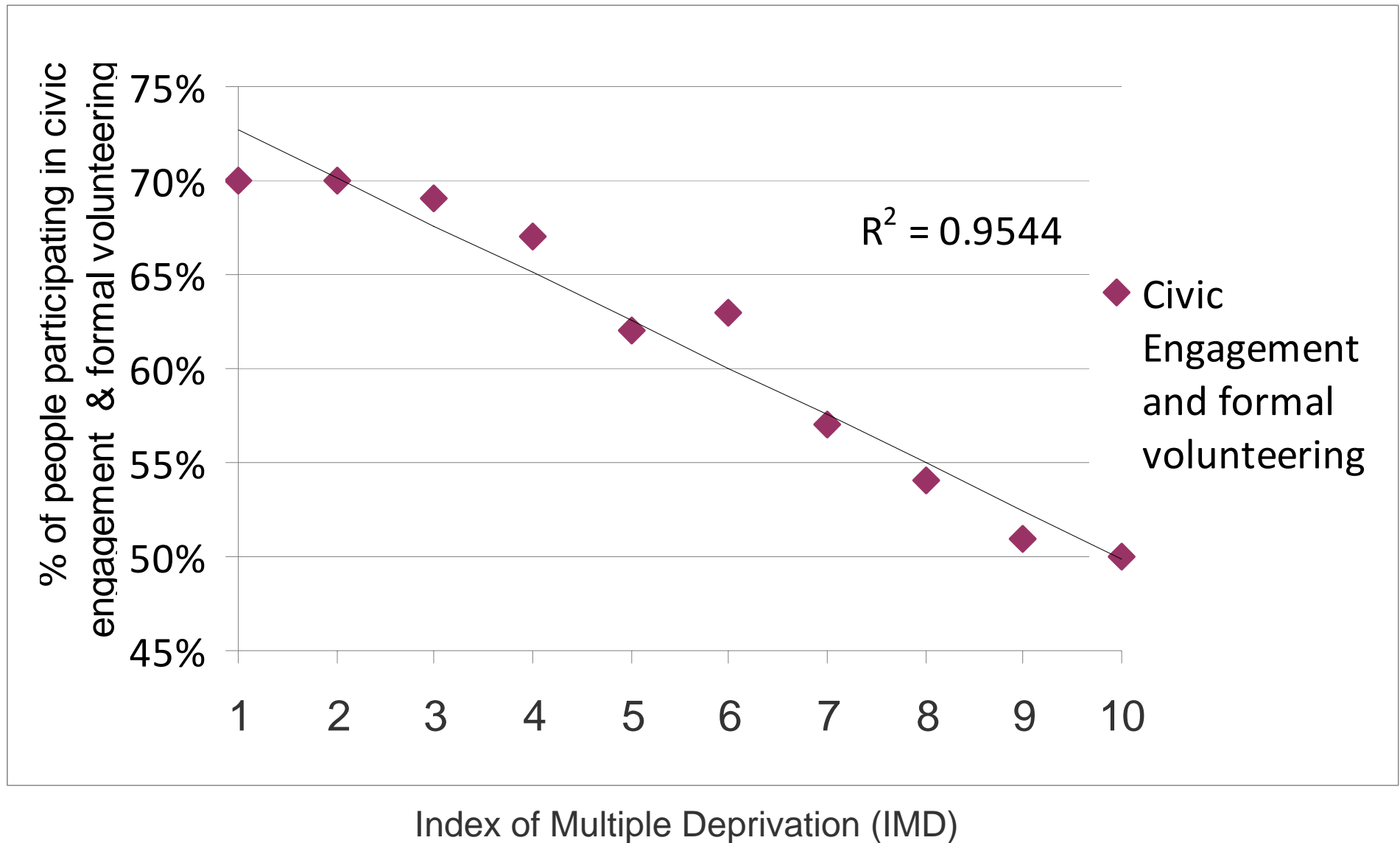
Base: All residents (1,021)

Ipsos MORI



Base: All resps who support the idea (835)

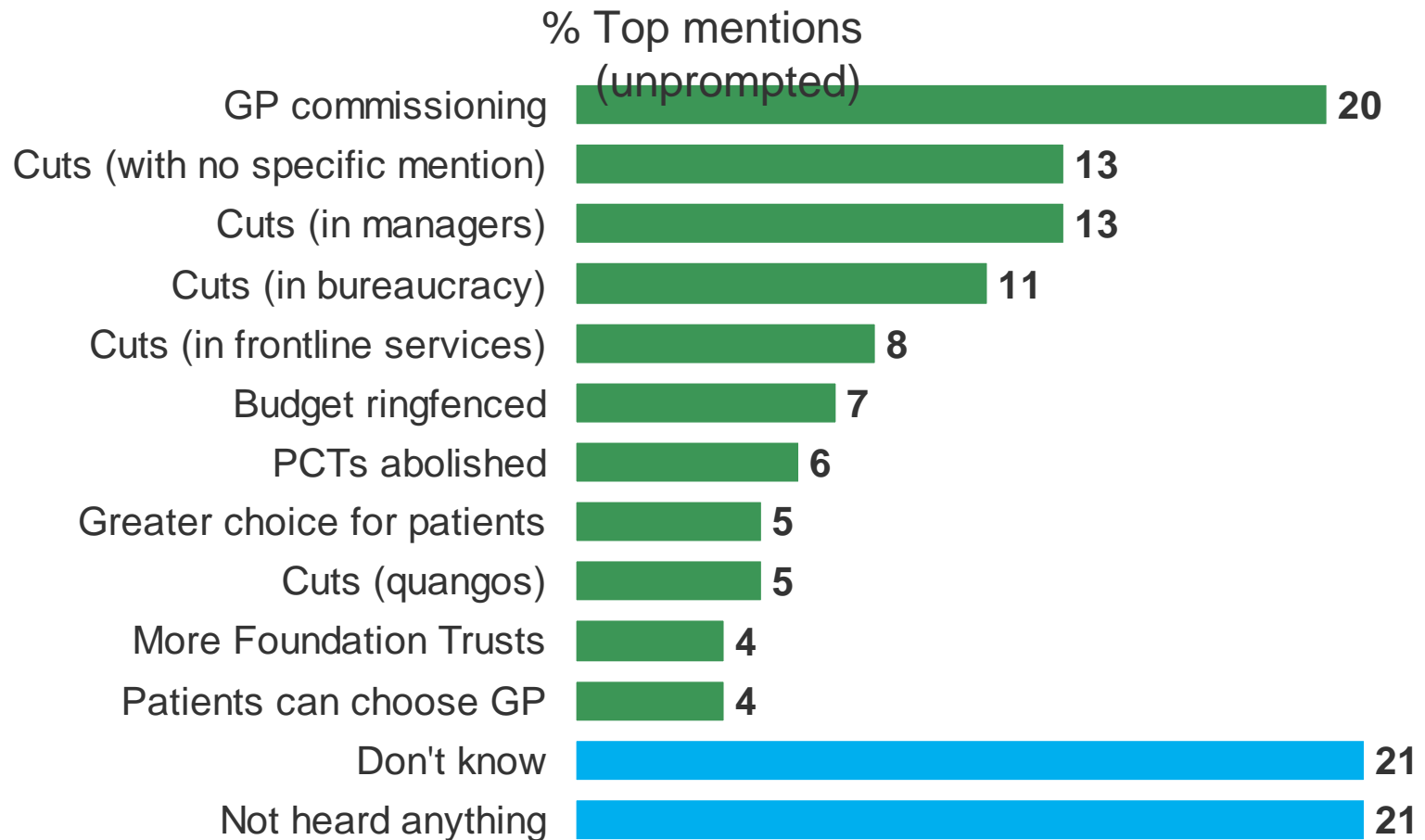
People are less likely to participate in civic engagement and formal volunteering in deprived areas



Reactions to the white paper

1/5 have latched on to GP commissioning but lots of people expecting cuts

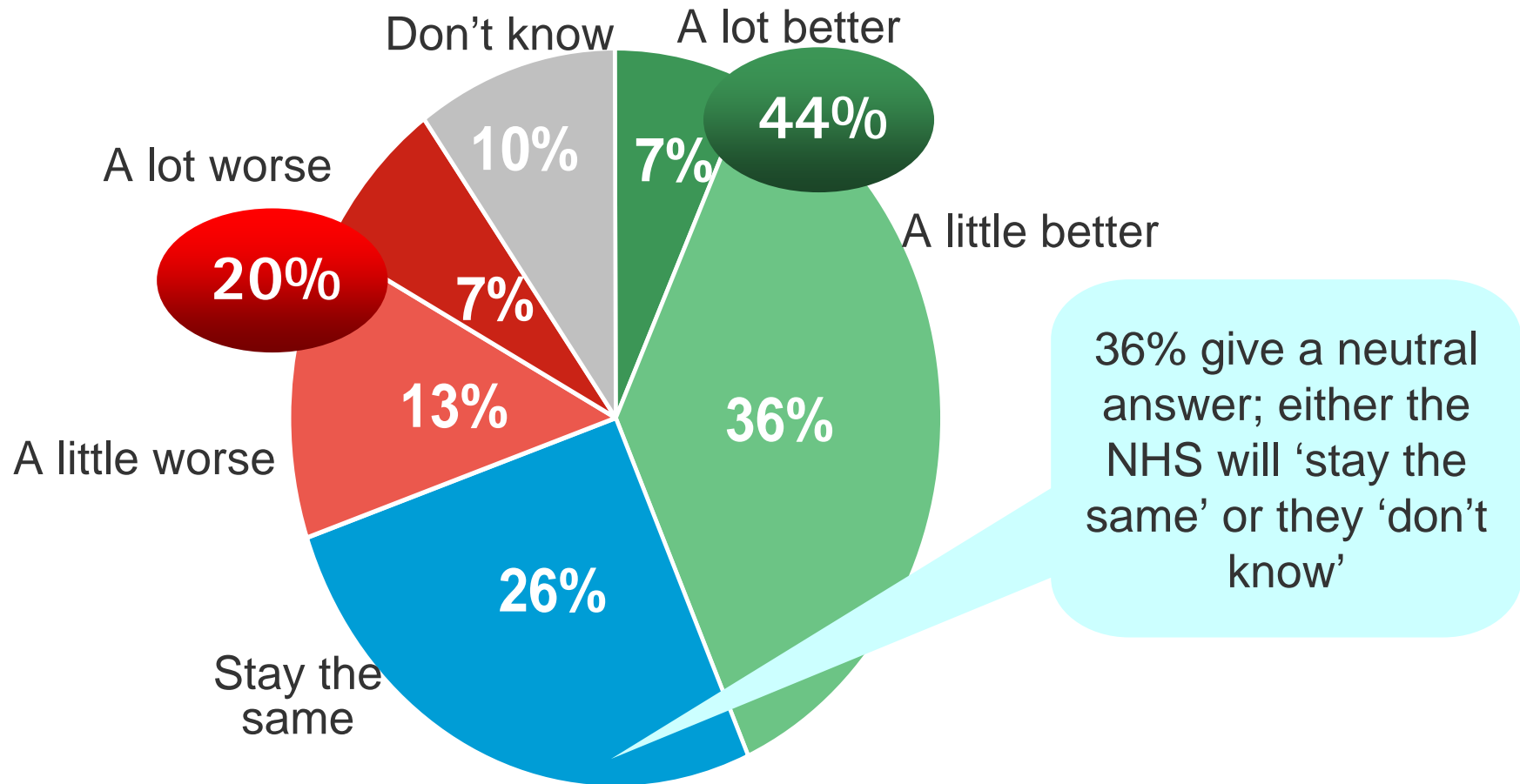
The Government has recently announced changes to the way that the NHS will be run. What, if anything have you heard about?



Base: 1,715 English adults interviewed face to face between 30th July and 5th August 2010 (Ipsos MORI Capibus)

Two in five believe that GP commissioning will be good for the NHS

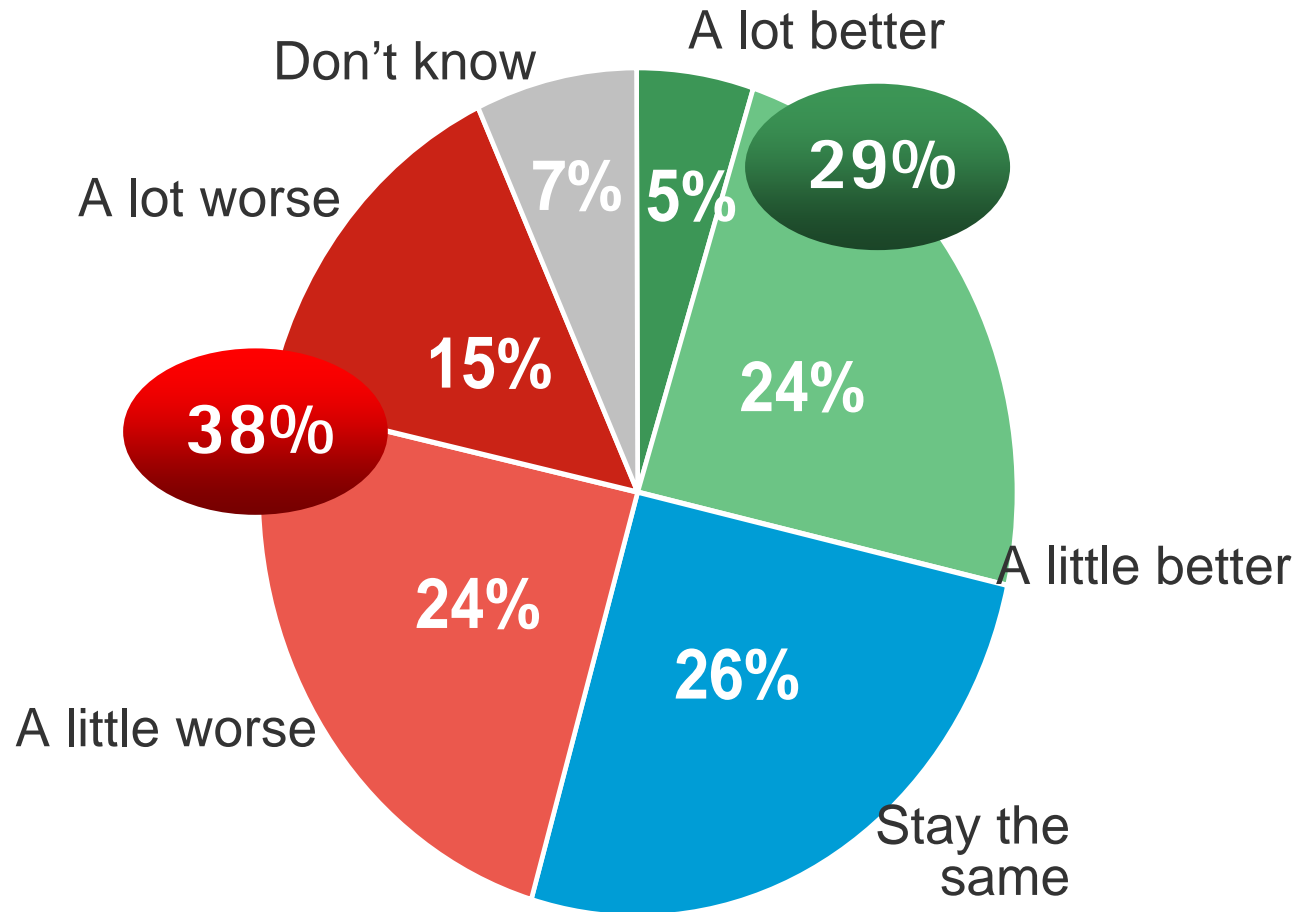
The Government has announced that GPs will have more say in the way the NHS spends its money. To what extent do you think this particular policy will make the NHS better or worse over the next few years, or will it stay the same?



Base: 863 English adults interviewed face to face between 30th July and 5th August 2010 (Ipsos MORI Capibus)

Concern over cuts probably driving pessimism

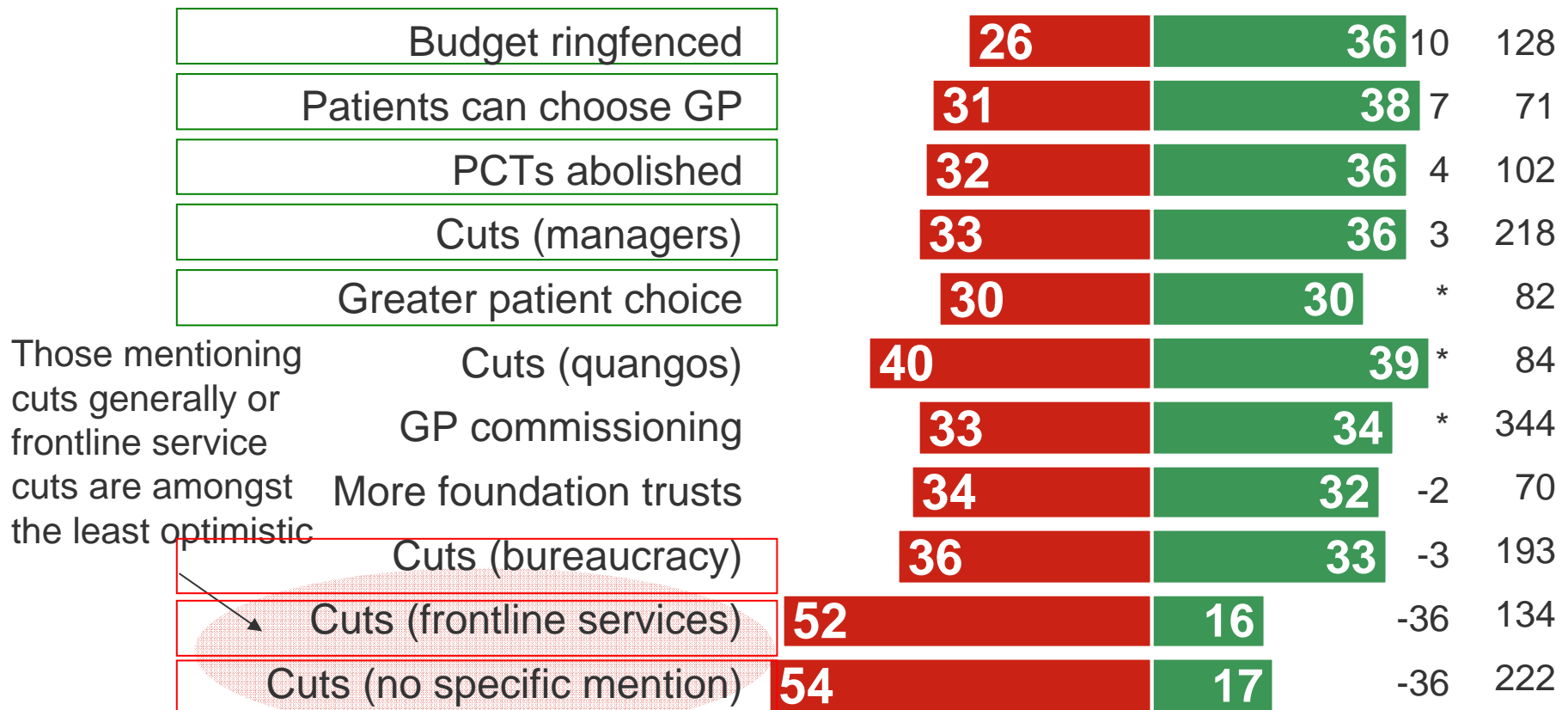
Thinking about the changes that will be made to the NHS... To what extent do you think these will make the NHS better or worse over the next few years, or will it stay the same?*



Base: 1,011 English adults who recall one or more changes. Interviewed face to face between 30th July and 5th August 2010 (Ipsos MORI Capibus) **Source: Ipsos MORI/DH Perceptions of the NHS Tracker C.1,000

However...opinions vary according to the changes recalled

Thinking about the changes that will be made to the NHS...
 To what extent do you think these will make the NHS better or worse over the next few years, or will it stay the same?

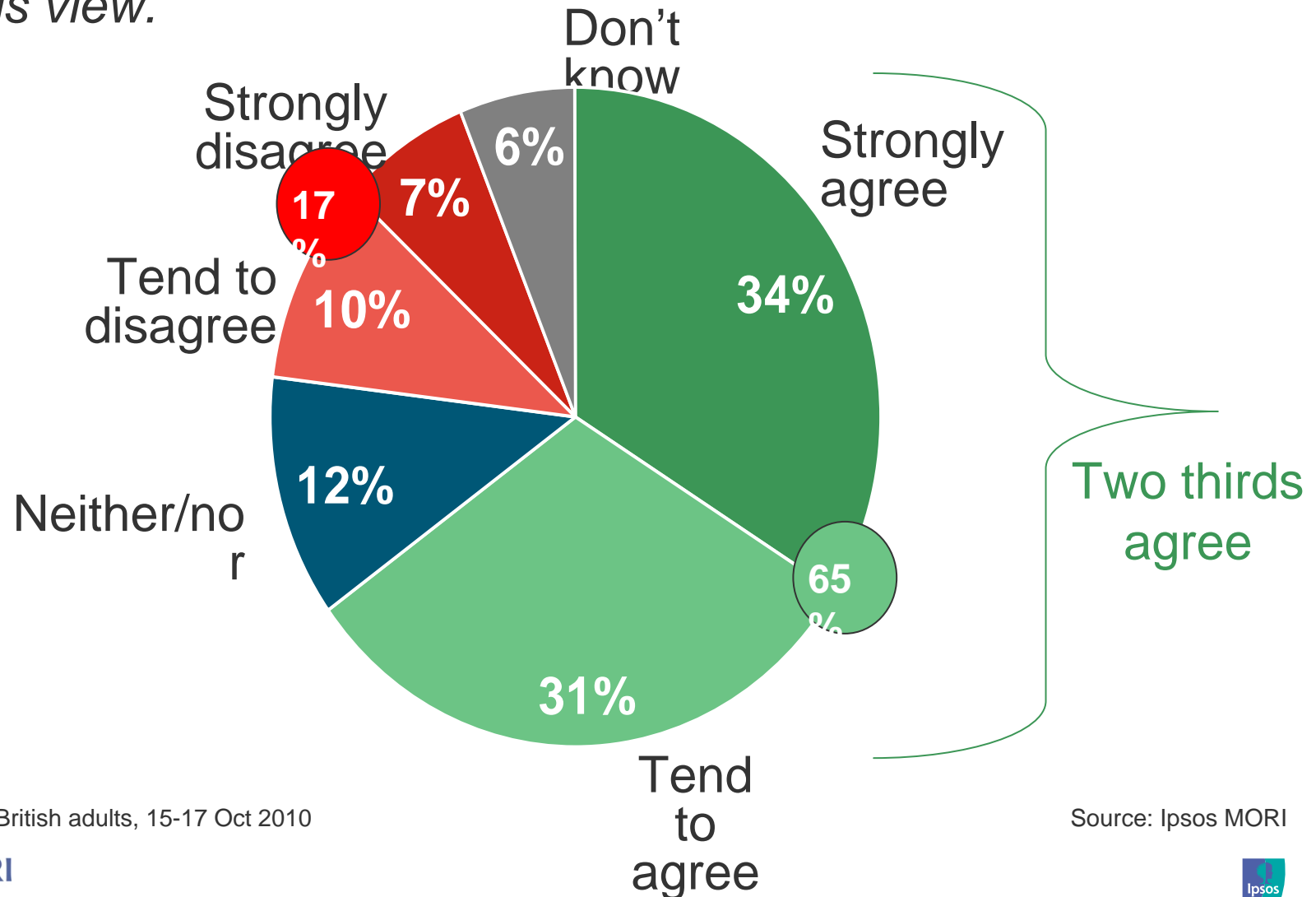


Base: 1,011 English Adults who recall one or more changes. interviewed face to face between 30th July and 5th August 2010 (Ipsos MORI Capibus)

An “information
revolution”

"Lies, damn lies and statistics"

Q. "A former prime minister said: 'There are lies, damn lies and statistics'. Please tell me how strongly you agree or disagree with his view."



Base: 1,009 British adults, 15-17 Oct 2010

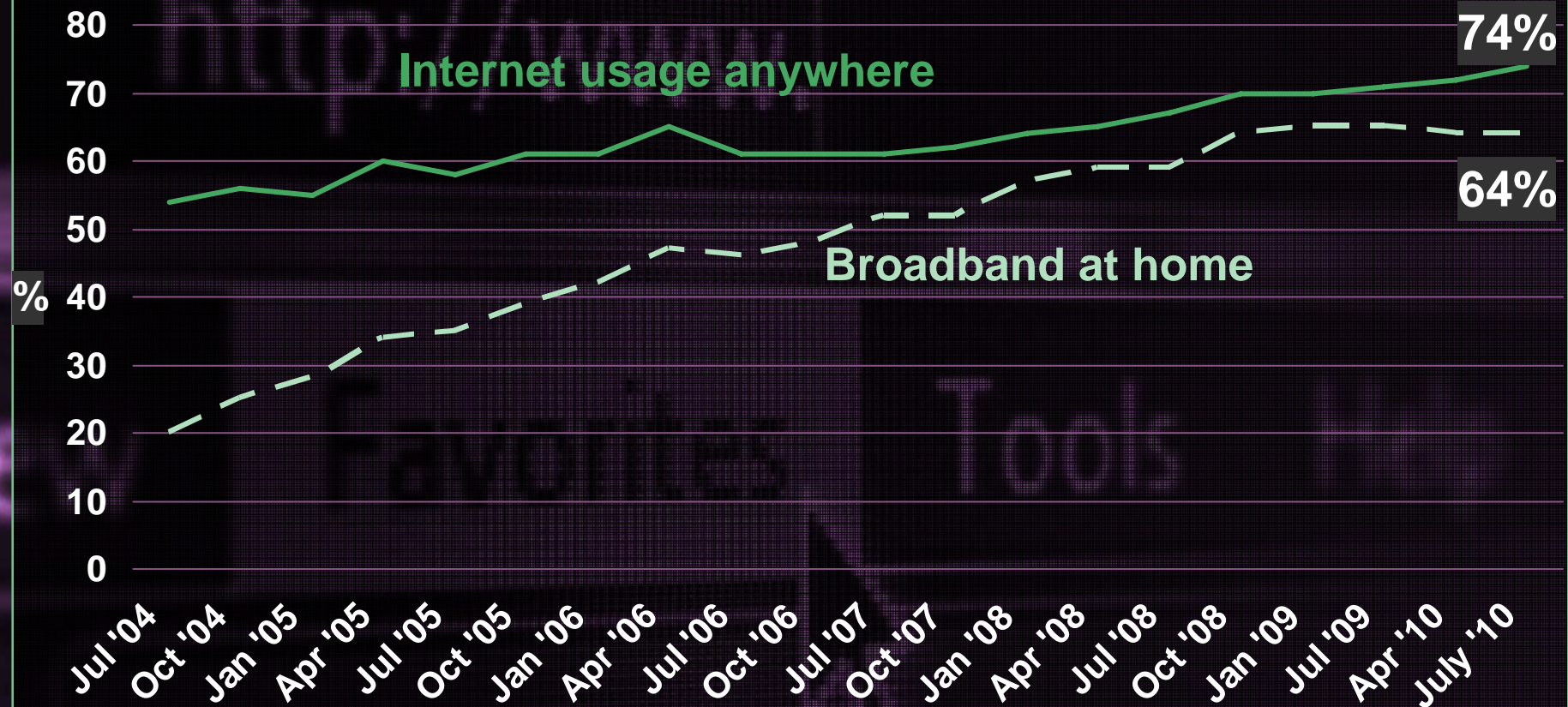
Ipsos MORI

Source: Ipsos MORI



Internet usage trends

Which of the following applies to you?



Base: circa 2,000 interviews per wave until January 2010, circa 1,000 GB adults aged 15+ per wave thereafter

Source: Ipsos MORI

Who is and isn't accessing the internet

% with internet access at home or at work, 2010 vs 4th Quarter 2006

% **All** 15-24 25-34 35-44 45-54 55-64 65+

All

AB

C1

C2

DE

Base: 3,160 GB adults aged 15+: Jan/Apr/Jul 2010 (compared to 10,000 GB adults 15+, Oct-Dec 2006)

Who is and isn't accessing the internet

% with internet access at home or at work, 2010 vs 4th Quarter 2006

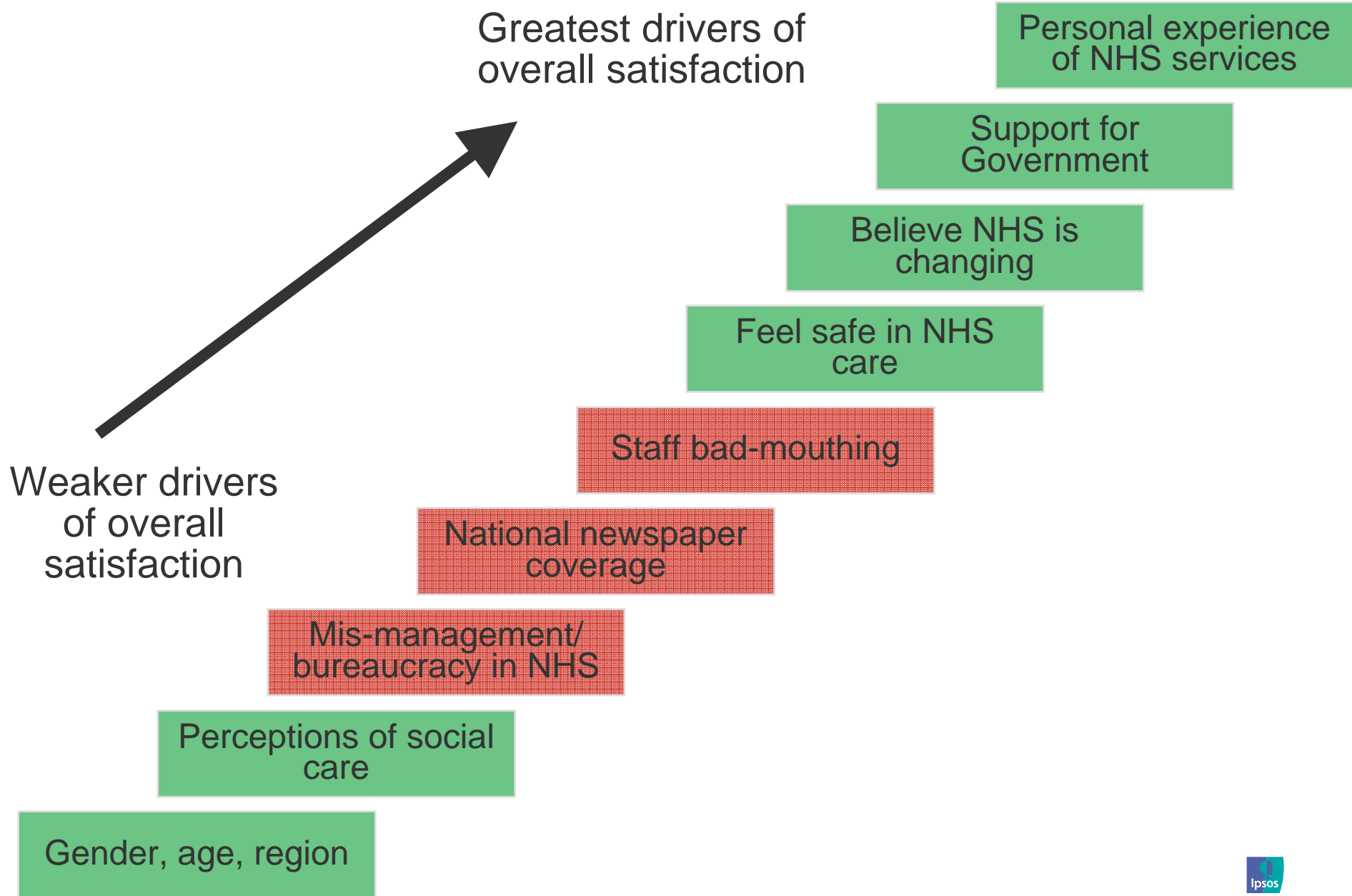
| % | All | 15-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
|-----|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| All | 74 ₊₁₂ | 87 ₊₁₃ | 87 ₊₁₅ | 88 ₊₁₀ | 84 ₊₁₂ | 67 ₊₈ | 39 ₊₁₅ |
| AB | 90 ₊₁₁ | 99 ₊₁₀ | 99 ₊₁₁ | 97 ₊₄ | 97 ₊₆ | 89 ₊₉ | 66 ₊₂₄ |
| C1 | 82 ₊₉ | 94 ₊₉ | 96 ₊₁₁ | 97 ₊₁₁ | 91 ₊₁₀ | 77 ₊₇ | 41 ₊₁₄ |
| C2 | 69 ₊₁₁ | 89 ₊₁₅ | 75 ₊₁₀ | 84 ₊₁₀ | 80 ₊₁₃ | 58 ₊₁₄ | 32 ₊₁₄ |
| DE | 51 ₊₁₄ | 70 ₊₁₅ | 73 ₊₂₈ | 86 ₊₁₄ | 53 ₊₁₅ | 34 ₊₅ | 16 ₊₈ |

Base: 3,160 GB adults aged 15+: Jan/Apr/Jul 2010 (compared to 10,000 GB adults 15+, Oct-Dec 2006)

Coalition commitment

“We will give front-line staff more control of their working environment”

Getting staff on board key - Staff bad-mouthing one of the key drivers of patient dissatisfaction



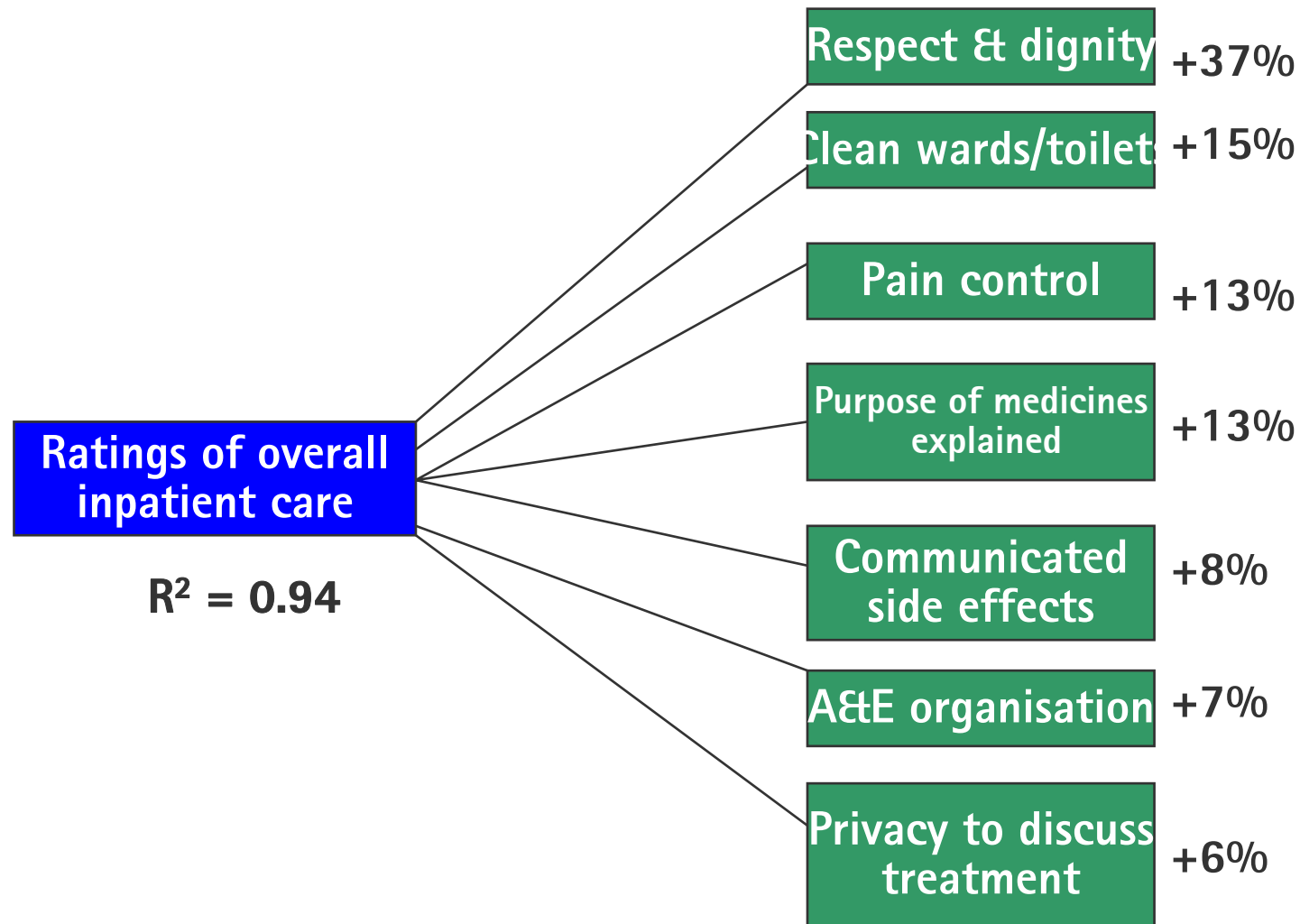
So what
matters
most?

What can Acute Trusts do to give patients the best experience?



Key Drivers of Perceptions of Acute Trusts

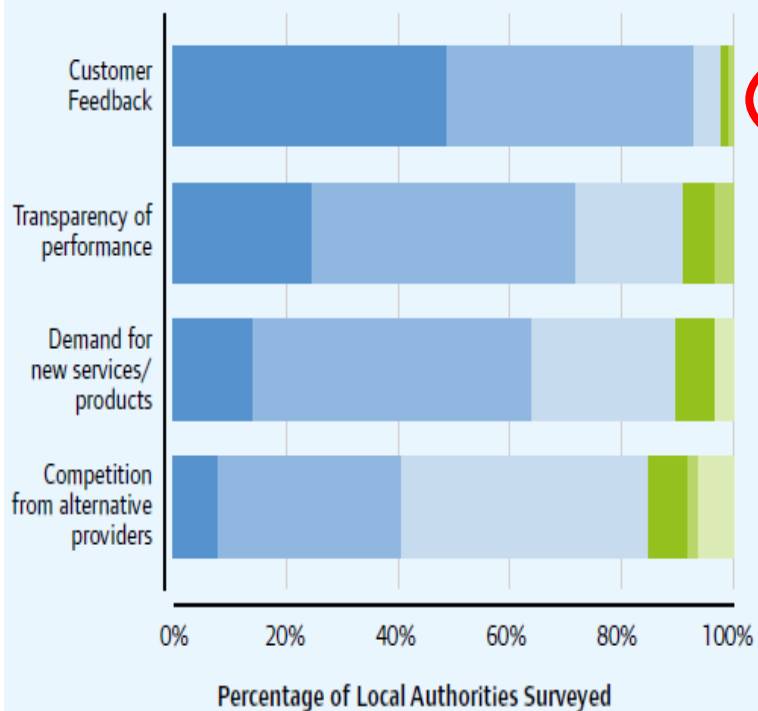
– things to focus on



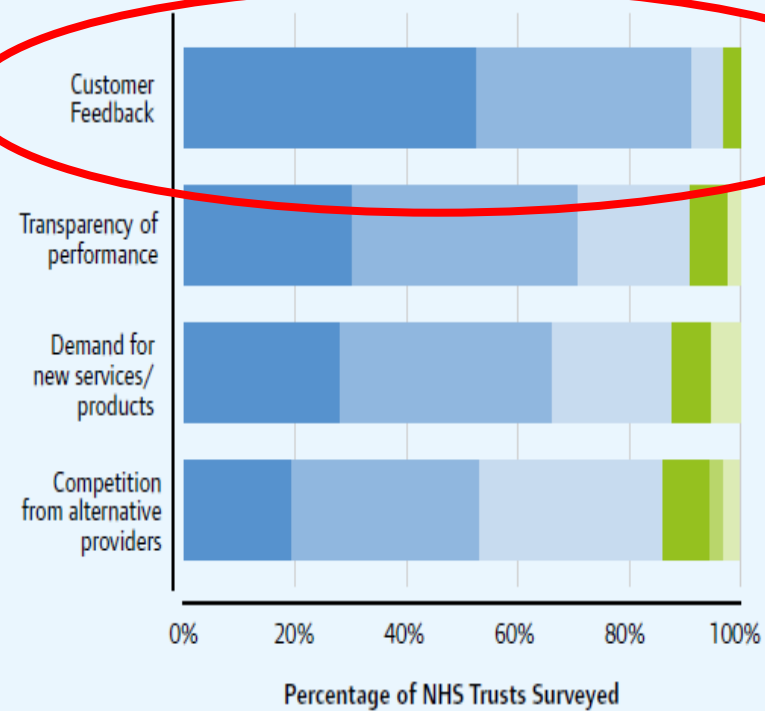
From a recent study for NESTA/Ernst and Young

The survey results suggest that the key incentive for organisations to innovate is customer feedback.

C: Incentives, as a whole, to be innovative – Local Government



D: Incentives, as a whole, to be innovative – NHS



But what
stops us a
lot of the
time?



Hierarchical/top-down cultures

**Inflexible targets/
performance
indicators**

Silo-working


**More accountable
to management/
politicians than to
patients?**

Bureaucracy

**Risk averse
professions and
managers**

**Media/public
scrutiny**

**Regulation/legislative
constraints**

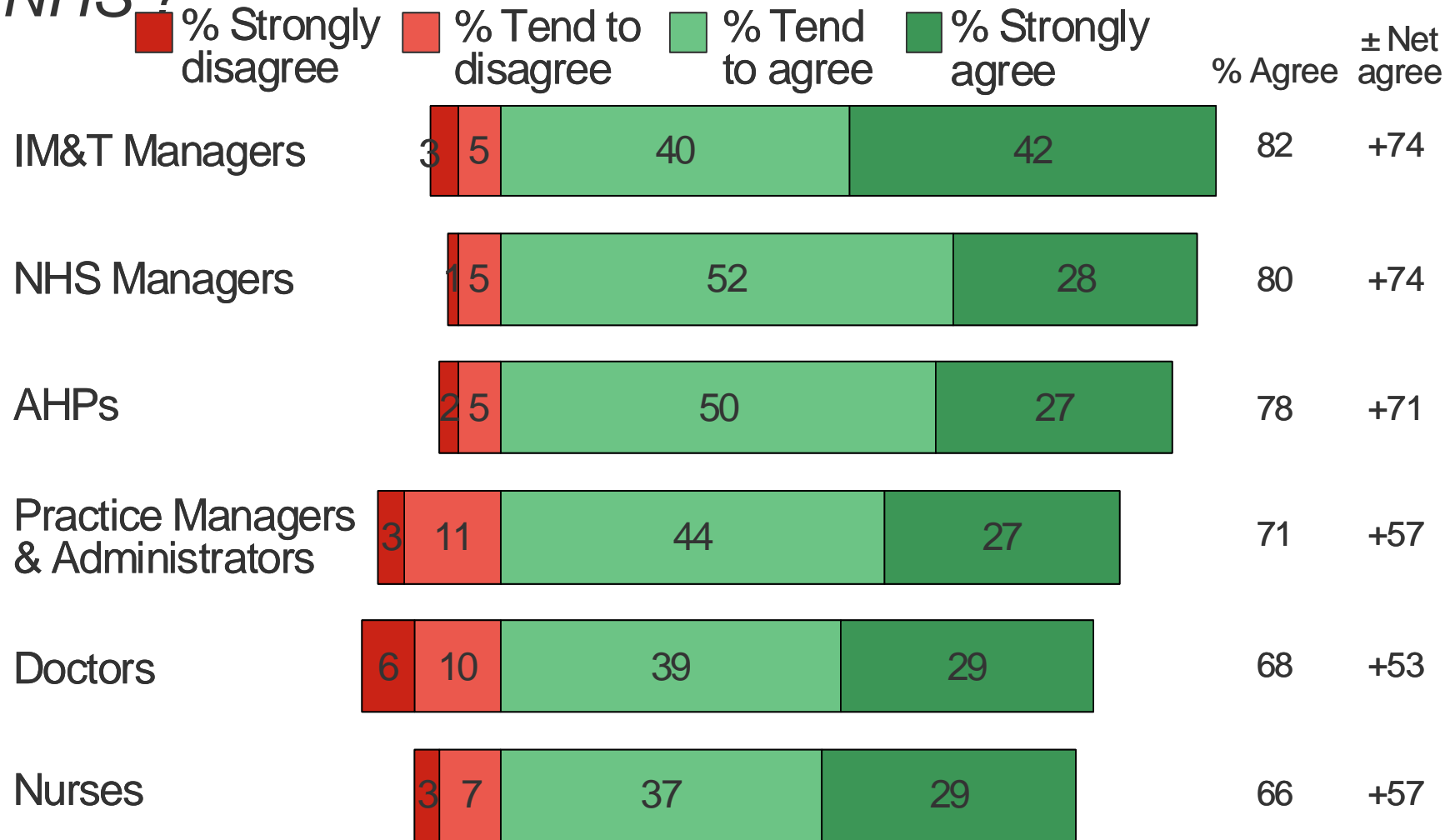


“In health, innovations must be properly piloted, and rapid change is not always a good idea; ideas need to be communicated and discussed within similar specialities and conclusions reached.”

(Clinician interviewed in “Innovation in the Public Sector – NAO, 2006”)

We liked the idea of NPFIT.....

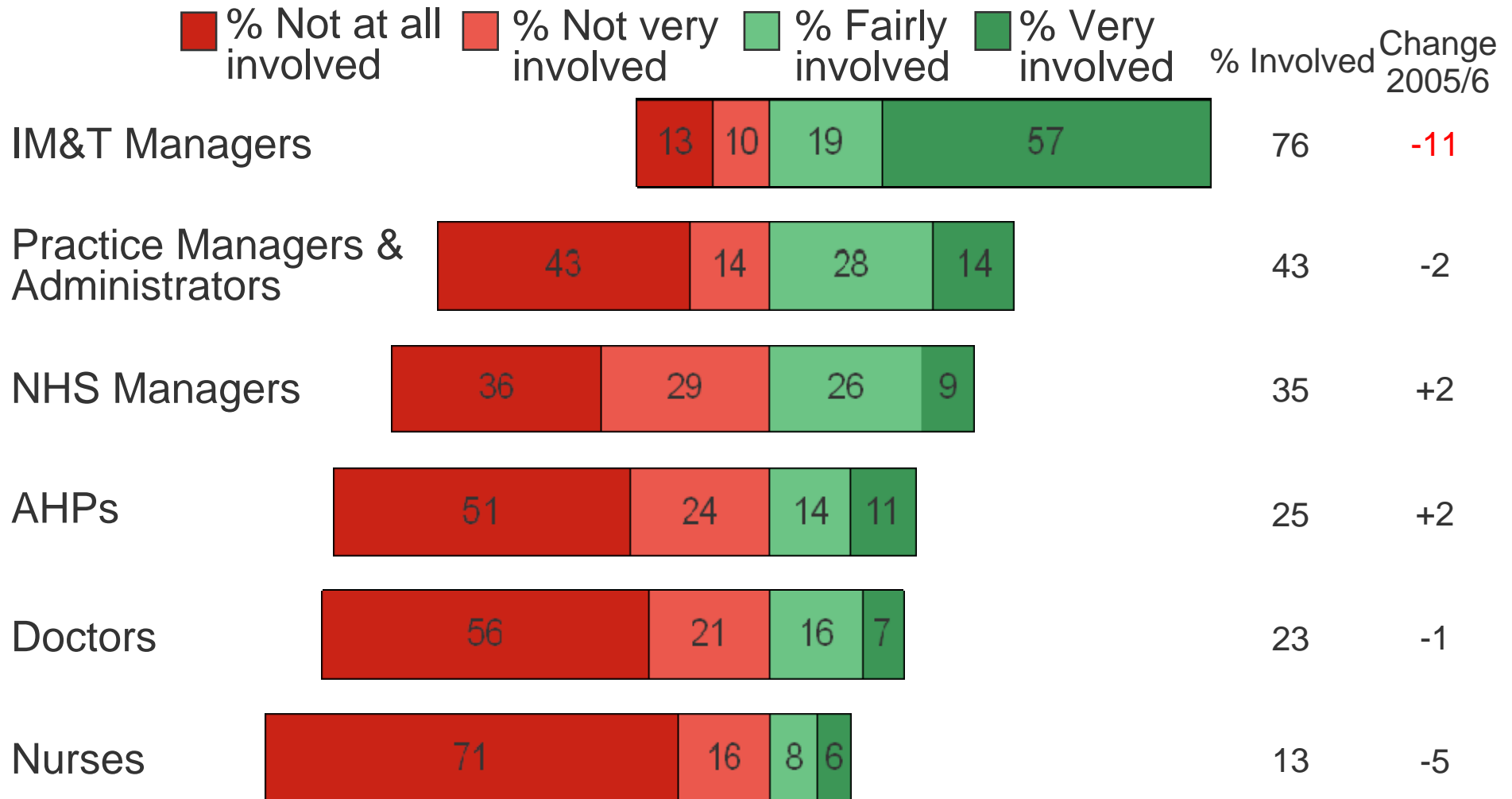
'The programme will improve clinical care in the NHS'?




Base: All Doctors (213); Nurses (207); AHPs (208); NHS Managers (200); IM&T Managers (158); Administrators (211)

But few felt they owned it

Q To what extent, if any, have you been involved in rolling out the National Programme for IT at your place of work?



Base: All Doctors (213); Nurses (207); AHPs (208); NHS Managers (200); IM&T Managers (158); Administrators (211)



All your powers of
leadership and persuasion
will be tested

Demographic shifts

Stakeholders more complex, people more demanding

The perfect storm

NHS funding

... and better at making media noise

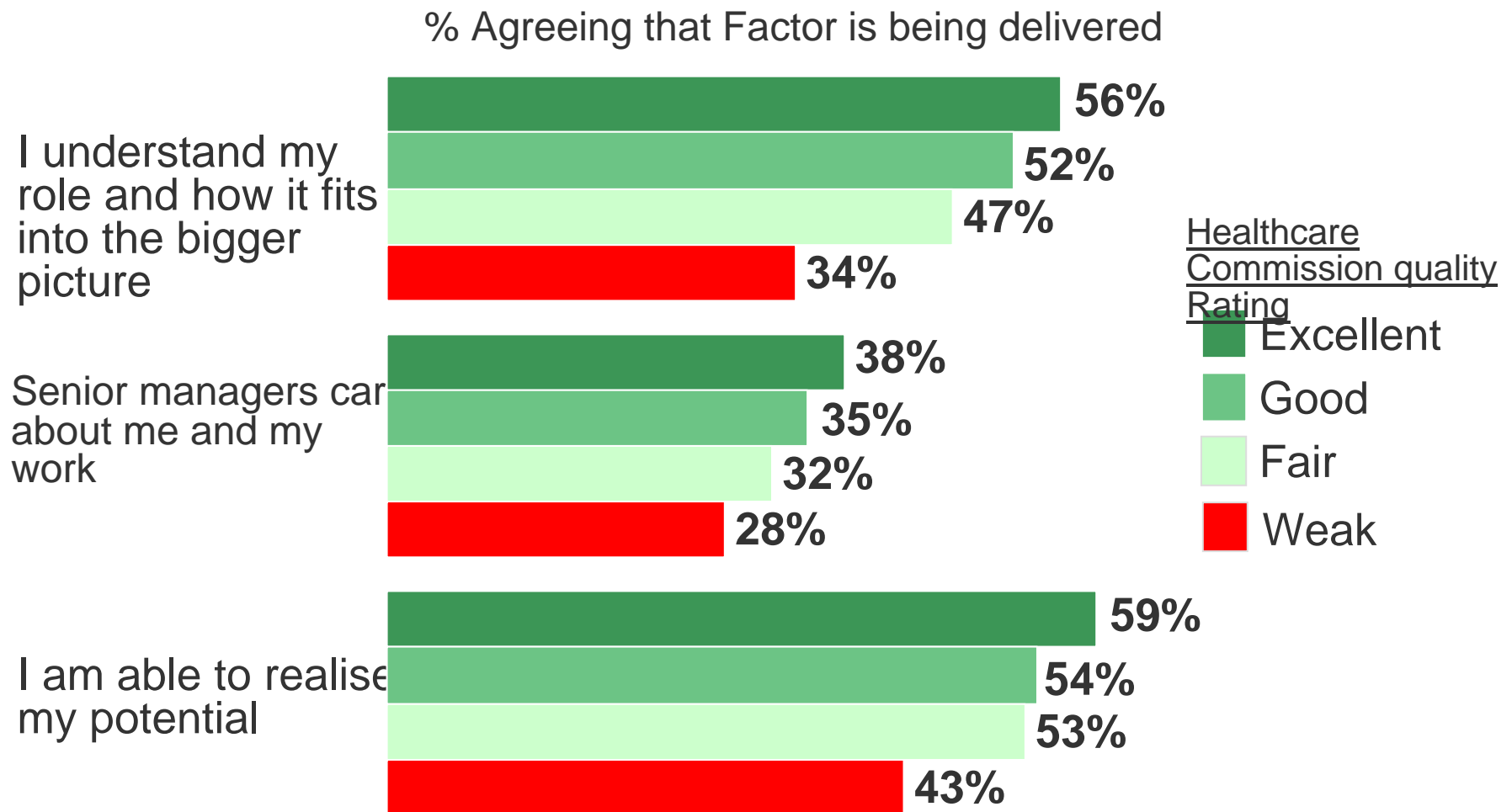
Your new job?

An ageing society, technological advances and public expectations are placing demands that all countries are struggling to meet. Countries do not have infinite sums of money to spend on health. ...
The debate is not about whether - but how - healthcare budgets can be most fairly shared out among a country's citizenry.

Sir Michael Rawlins, Chairman of NICE, 18 August 2008

You now *own* this debate

Good leaders engage their staff



Base: 37 NHS Trusts, August 2007

Thank
you

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