

South Africa's perceptions of the health system do not align with the realities Findings indicate ample room for growth

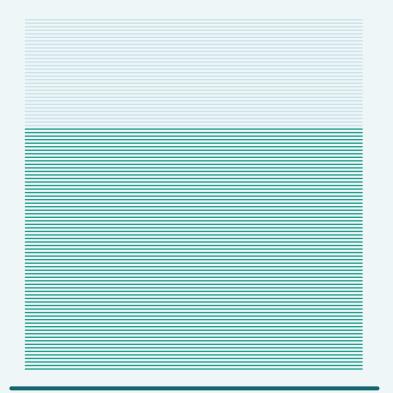
A survey of people and healthcare professionals from



19 countries

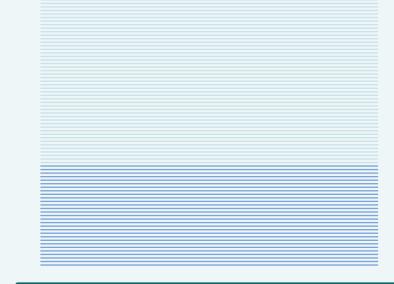
Representing over 36% of the world's population, including South Africans

South Africans perceive they have more access to healthcare than what the system is set up for in reality, which signals the opportunity to improve access to care further



80%

The majority of the South African population rates their current health positively (good, very good or excellent)



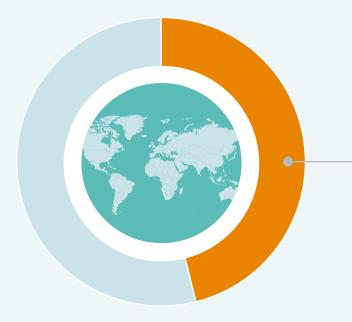
33%

Healthcare professionals are less

optimistic, with just one third of healthcare professionals agreeing that the overall health of the population in South Africa is positive

Healthcare professionals' less optimistic perceptions of healthcare in South Africa are likely driven by their perceptions of access to care across all phases of the continuum

The study reveals that the largest **perception**/ reality gap across the 19 countries is centred on health systems integration



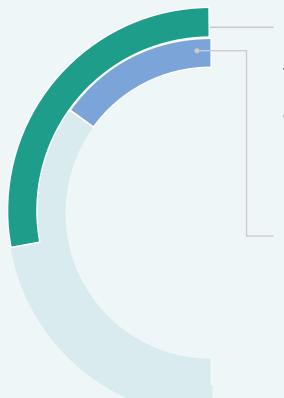
46% of the South African population think the health system in the country is unintegrated

While **healthcare professionals** feel even more strongly of healthcare professionals believe that the 74%

local healthcare system is unintegrated, a 16% increase from 2016

South Africans lack of perceived knowledge

about **connected care technology** is one of the barriers to wider technology proliferation



66% of healthcare professionals believe they are knowledgeable about connected care technologies, while only

37% of the general South African population feel the same

South Africa's efficiency ratio, which compares the country's health expenditure to the key health outcomes among the population is the lowest out of the 19 countries in this study, indicating considerable inefficiencies in the budget that is spent.

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The study was conducted in partnership with an independent global market research firm in 19 countries in recent months. More than 3,800 healthcare professionals and 29,000 (general population) total were surveyed in Argentina, Australia, Brazil, Canada, China, France, Germany, Italy, The Netherlands, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, UAE, UK and USA.