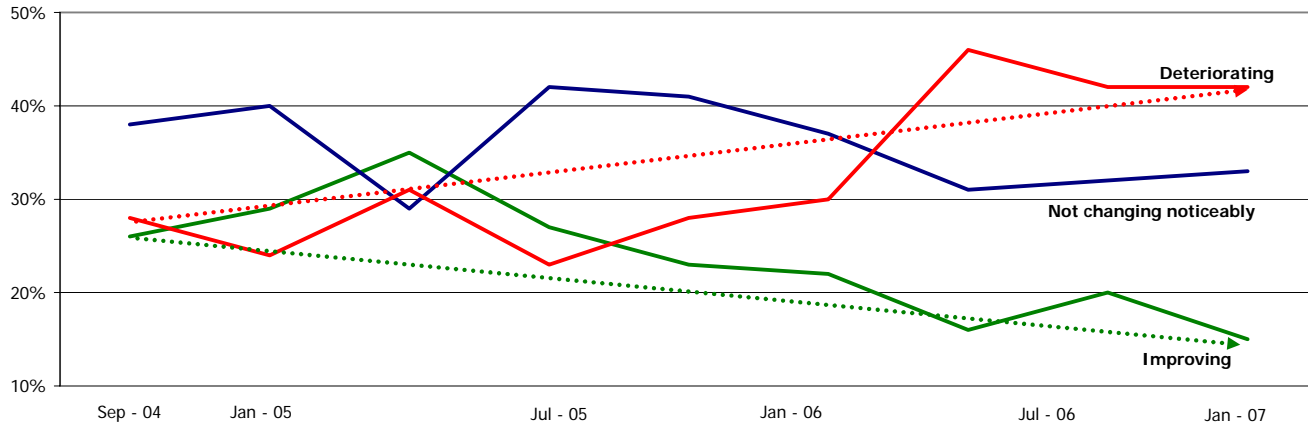


Quarterly YouGov Health Trends survey: Sep 2004 - Jan 2007

1. Over the last 12 months, do you think that the NHS has been deteriorating, not changing noticeably or improving?

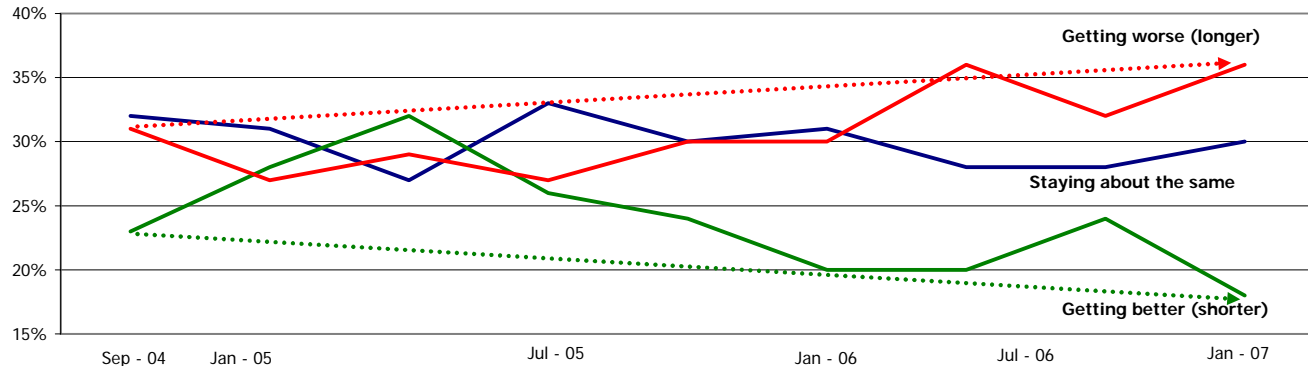


Comment as at January 2007:

1. Less people think the NHS is improving while more think it is deteriorating
2. NHS waiting lists are getting better contrary to question 1. The differences are small but could be because there has been a focus on MRSA recently in the media

An interesting insight from looking at all the data is that the Scots are happier with the NHS than they were a year ago while there has been a significant downturn in the South

2. Do you think NHS waiting lists are getting worse (longer), staying about the same or getting better (shorter)?



Headlines - Sep 2005
 Postcode Lottery for best care
 Hospitals denying patients the best cover to save money
 Much criticism of NICE due to perceived rationing of drugs

Headlines - Jan 2006
 Launch of new Conservative health policy by David Cameron
 Dentists quitting the NHS
 Hospitals contemplating banning treatment for smokers and the overweight
 BUPA thinking of quitting Ireland

Headlines - Apr 2006
 Dentists contract recently signed
 Nurse redundancies
 Doctors pay exceeding £250k
 NHS debt will reach £1 billion by end of the year

Headlines - January 2007
 GPs are overpaid
 MRSA will be difficult to defeat
 NHS books will be balanced by the end of 2007