

# Healthcare in Europe and in the USA



Detailed results

CHAM 2011 – September 2011





In 2006, Europ Assistance Group and the Cercle Santé Société started with CSA Institute an European annual barometer about « relationship and behaviours of European towards their healthcare system ».

The objectives are both to measure and compare public opinion about Health main topics and look into evolutions.

## ***Studied topics***

- Assessment of the healthcare system and of quality of care
- Healthcare and social requirements
- Patients mobility for access to treatment
- Management of ageing and dependent people
- New technologies
- Prevention
- Contribution of healthcare sector to Economy

# Studied countries

Year	Countries	Effectives	
2006-2007	<ul style="list-style-type: none"> <li>• Germany</li> <li>• France</li> <li>• Italy</li> <li>• United-Kingdom</li> <li>• Sweden</li> </ul>	<ul style="list-style-type: none"> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> </ul>	
2009	<ul style="list-style-type: none"> <li>• Germany</li> <li>• France</li> <li>• Italy</li> <li>• United-Kingdom</li> <li>• Sweden</li> <li>• Poland</li> </ul>	<ul style="list-style-type: none"> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> </ul>	
2010	<ul style="list-style-type: none"> <li>• Germany</li> <li>• France</li> <li>• Italy</li> <li>• United-Kingdom</li> <li>• Sweden</li> <li>• Poland</li> <li>• USA</li> <li>• Austria</li> </ul>	<ul style="list-style-type: none"> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> <li>•400</li> <li>•800</li> <li>•400</li> </ul>	
2011	<ul style="list-style-type: none"> <li>• Germany</li> <li>• France</li> <li>• Italy</li> <li>• United-Kingdom</li> <li>• Sweden</li> <li>• Poland</li> <li>• USA</li> <li>• Austria</li> <li>• Spain</li> <li>• Czech Republic</li> </ul>	<ul style="list-style-type: none"> <li>•500</li> <li>•500</li> <li>•500</li> <li>•500</li> <li>•500</li> <li>•500</li> <li>•1000</li> <li>•500</li> <li>•500</li> <li>•500</li> </ul>	

# Technical pieces of information

- **DATA COLLECT MODE:** Phone at respondents home
- **SAMPLE PLAN:** National representative sample built according to quotas method by age, region and socio-professional category
- **SAMPLES SIZES :** 500 persons aged 18 and more in European countries and 1000 persons in United States, 5500 interviews in 10 countries)
- **FIELDWORK DATES :** May-June 2011
- **QUESTIONNAIRE DURATION:** 15 minutes



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# Assessment of the healthcare system and of quality of care

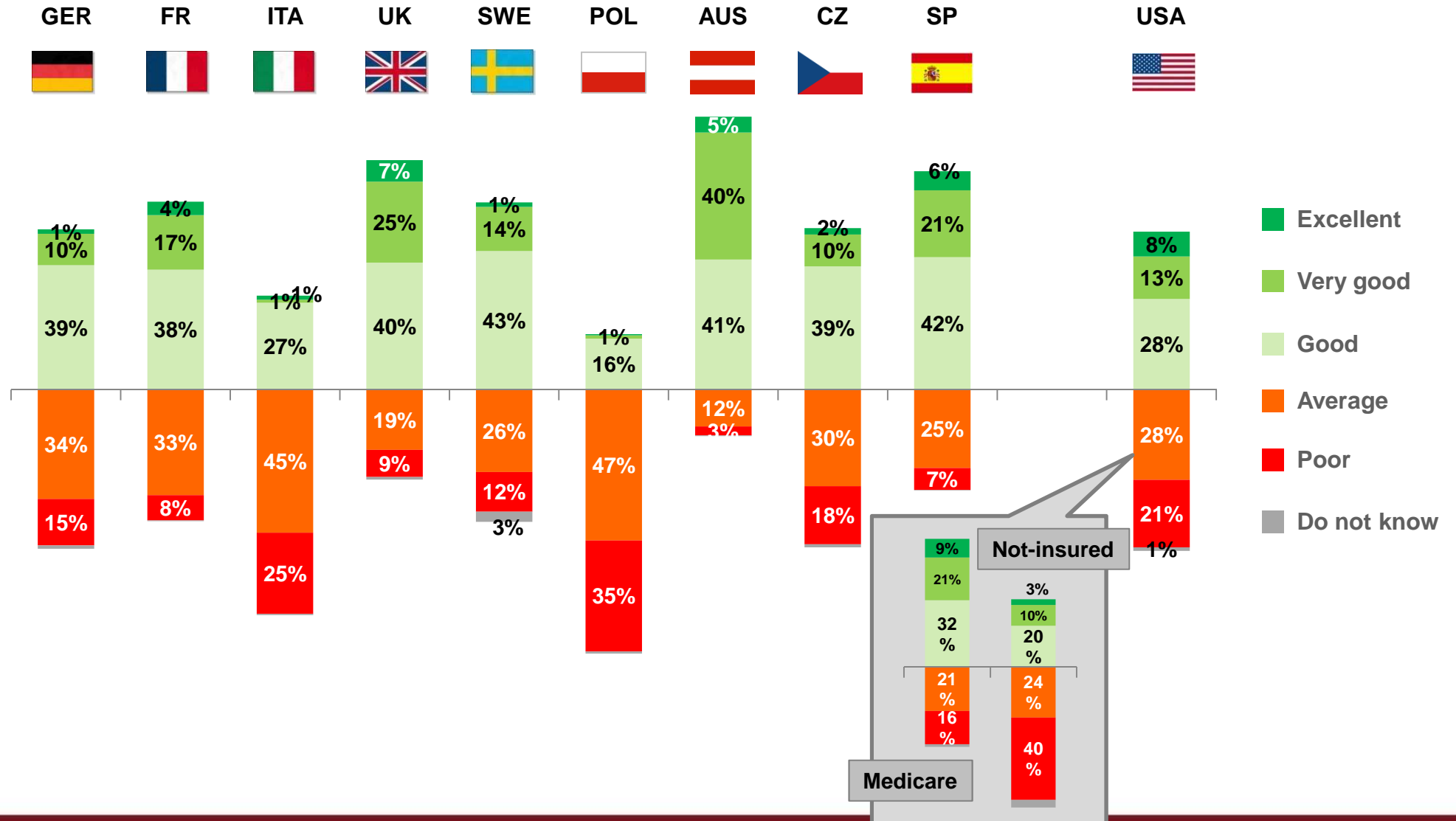


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# Assessment of the healthcare system

How would you evaluate the organization of the health system today ?



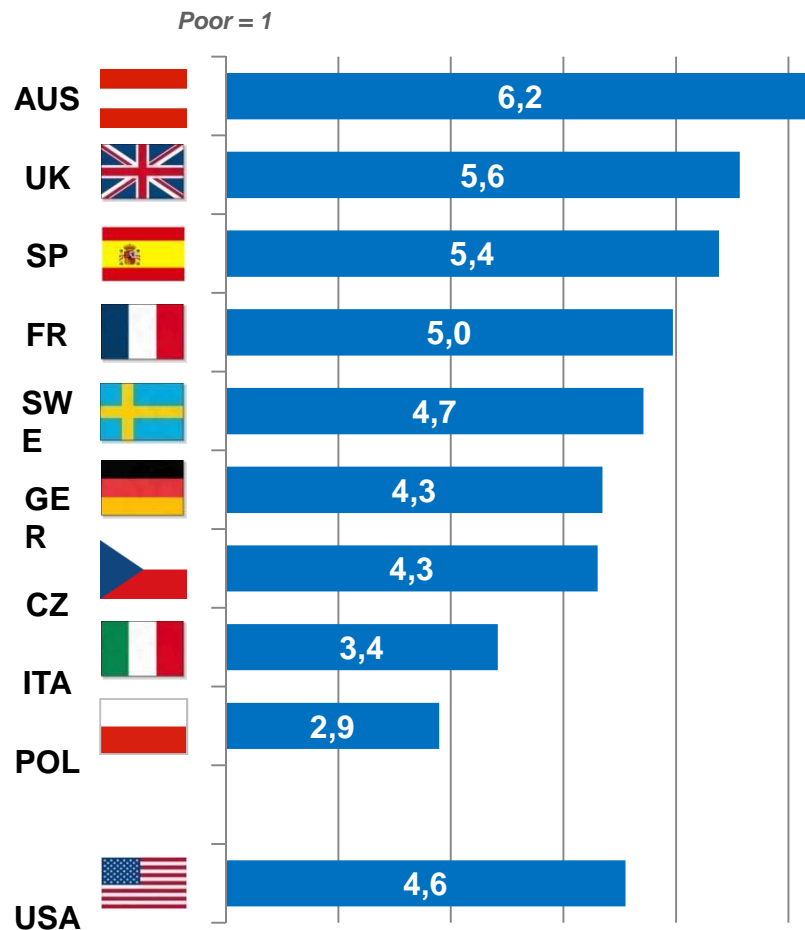
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# Assessment of the healthcare system

How would you evaluate the organization of the health system today ?

Score calculated with following values : poor =1, average= 3,25, good = 5.5, very good = 7.75, Excellent = 10



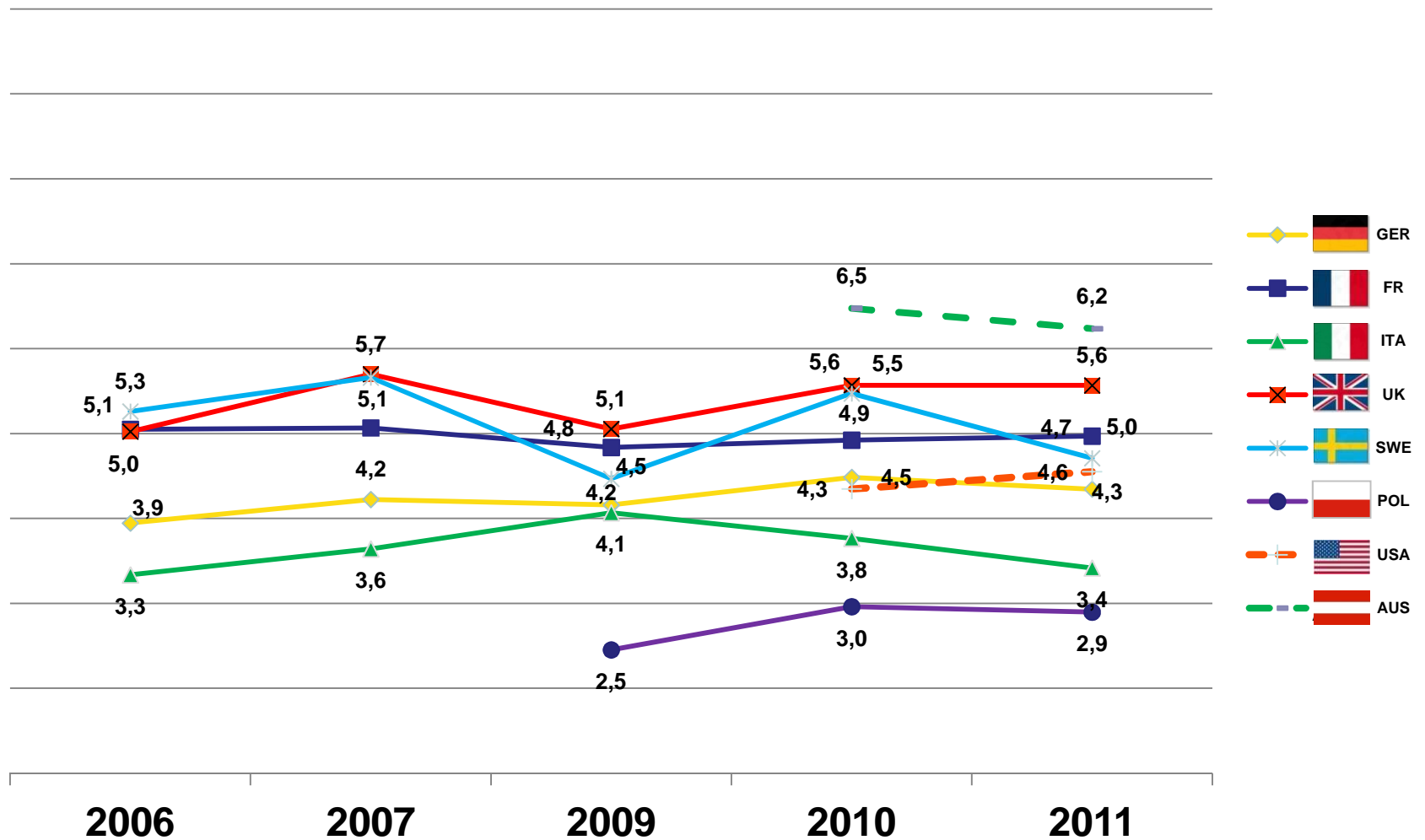
Excellent = 10

More negative categories	More positive categories
Women (6,0)	Men (6,4)
Women (5,3); <40 y.o (5,3)	Men (5,8); 60 y.o + (6,2); Inactives (5,9)
	60 y.o+ (5,9)
Women (4,7)	Men (5,3)
	60 y.o+ (5,0)
SPC- (3,2)	60 y.o+ (3,8)
<40 y.o (4,1); SPC- (4,4) Not insured (3,4)	SPC+ (4,7); 60 y.o + (4,8) Medicare (5,2)

# Assessment of the healthcare system – Evolution 2006-2011

## Evolution since 2006 of the opinions on the health system's organisation

Excellent = 10



Poor = 1



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# Threats for future

In the coming years, our health system will face several threats, which I am going to read to you.

For each of them, do you feel that the threat is very important, somewhat important, not really important or not important at all?

	GER	FR	ITA	UK	SWE	POL	AUS	CZ	SP	USA
<b>Very important threat (%)</b>										
Lack of public funding	50%	53%	85%	78%	61%	69%	50%	56%	75%	54%
Increase of direct costs for individuals	55%	48%	54%	52%	43%	69%	51%	51%	73%	66%
Increase in prices for medical procedures	53%	50%	66%	53%	42%	66%	43%	52%	73%	66%
Unequal access to healthcare	53%	54%	68%	68%	71%	71%	49%	40%	66%	63%
Waiting times before receiving treatment	40%	45%	75%	70%	65%	88%	42%	41%	76%	58%
Shortage of general practitioners	42%	58%	50%	68%	65%	56%	39%	34%	73%	63%
Risks of getting an infection in hospital	67%	41%	64%	83%	65%	65%	41%	28%	80%	70%
Medical errors	52%	40%	78%	79%	70%	65%	47%	37%	75%	71%

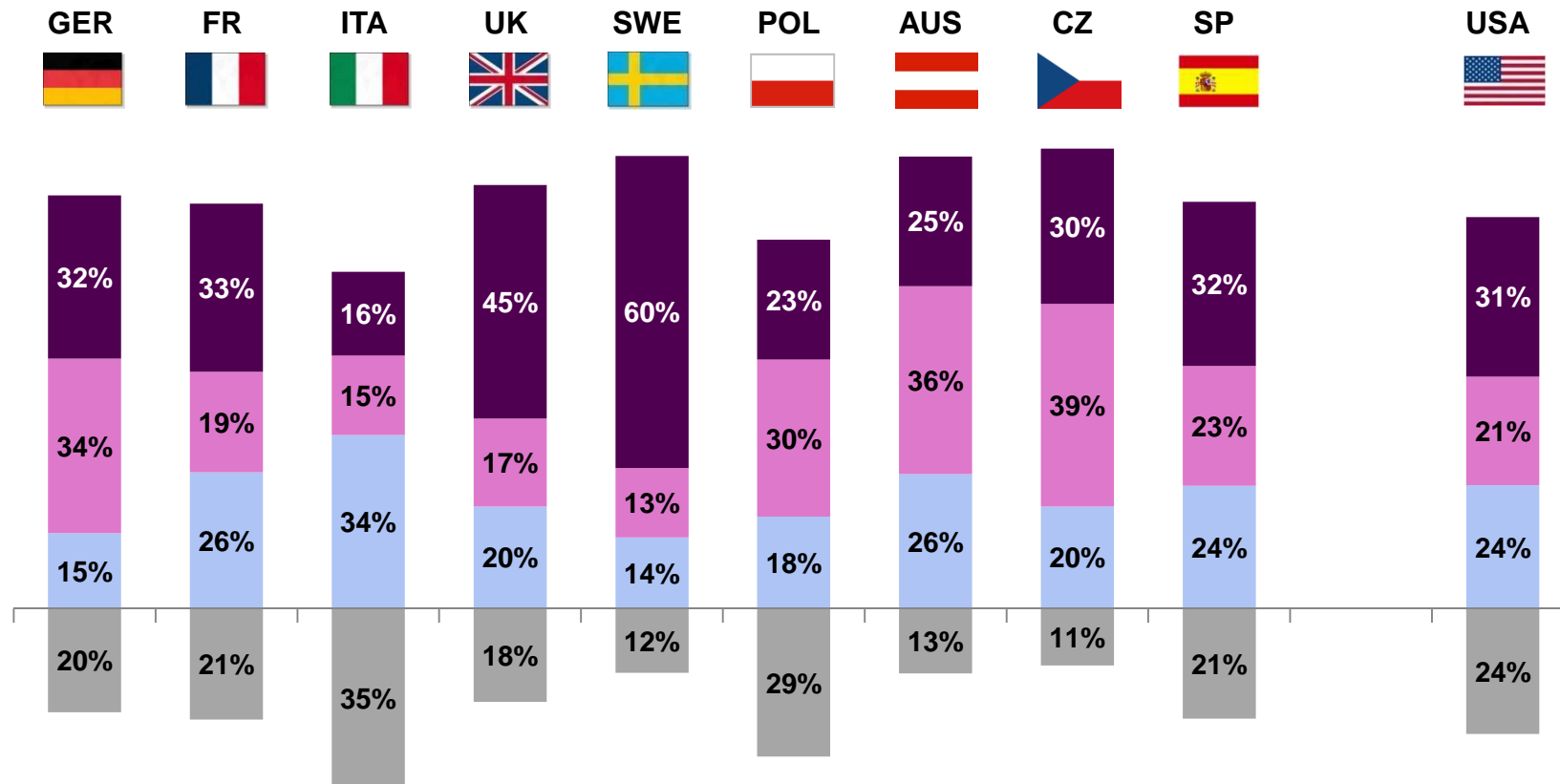
First threat quoted : evolution between 2006 and 2011

	GER 		FR 		ITA 		UK 		SWE 	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Lack of public funding	1					1	1			
Increase of direct costs for individuals										
Increase in prices for medical procedures										
Unequal access to healthcare										1
Waiting times before receiving treatment					1				1	
Shortage of general practitioners			1	1						
Risks of getting an infection in hospital		1						1		
Medical errors										

# New funding sources for future

What do you think is the best solution to cover the increase in health care expenses?

- Increase taxes or compulsory contributions
- Increase private insurance, optional supplemental insurance or supplemental policies from mutual insurance companies
- Pay a greater excess for each medical service
- Do not know

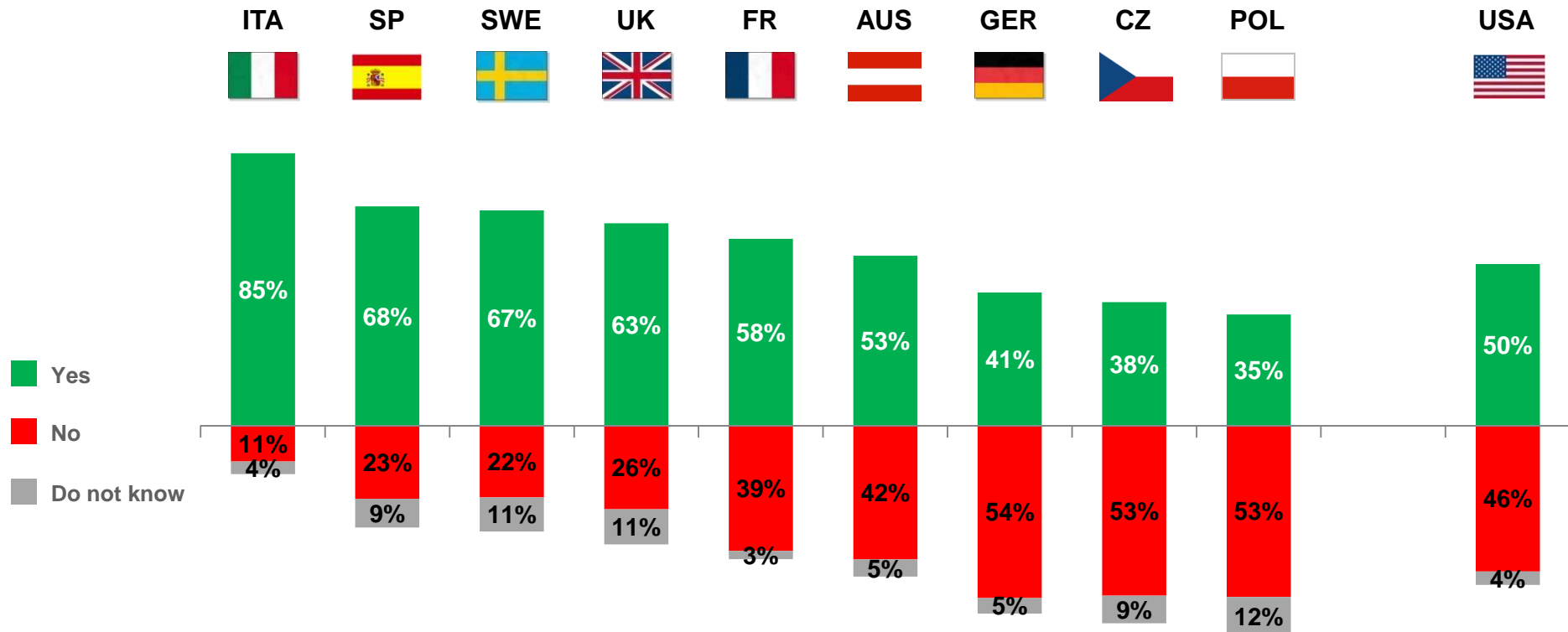


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# Medicines and trust in control mechanisms –2011 actuality

Do you currently trust the control mechanisms put in place by health authorities to limit the risks related to taking medicines?



# Healthcare and social requirements

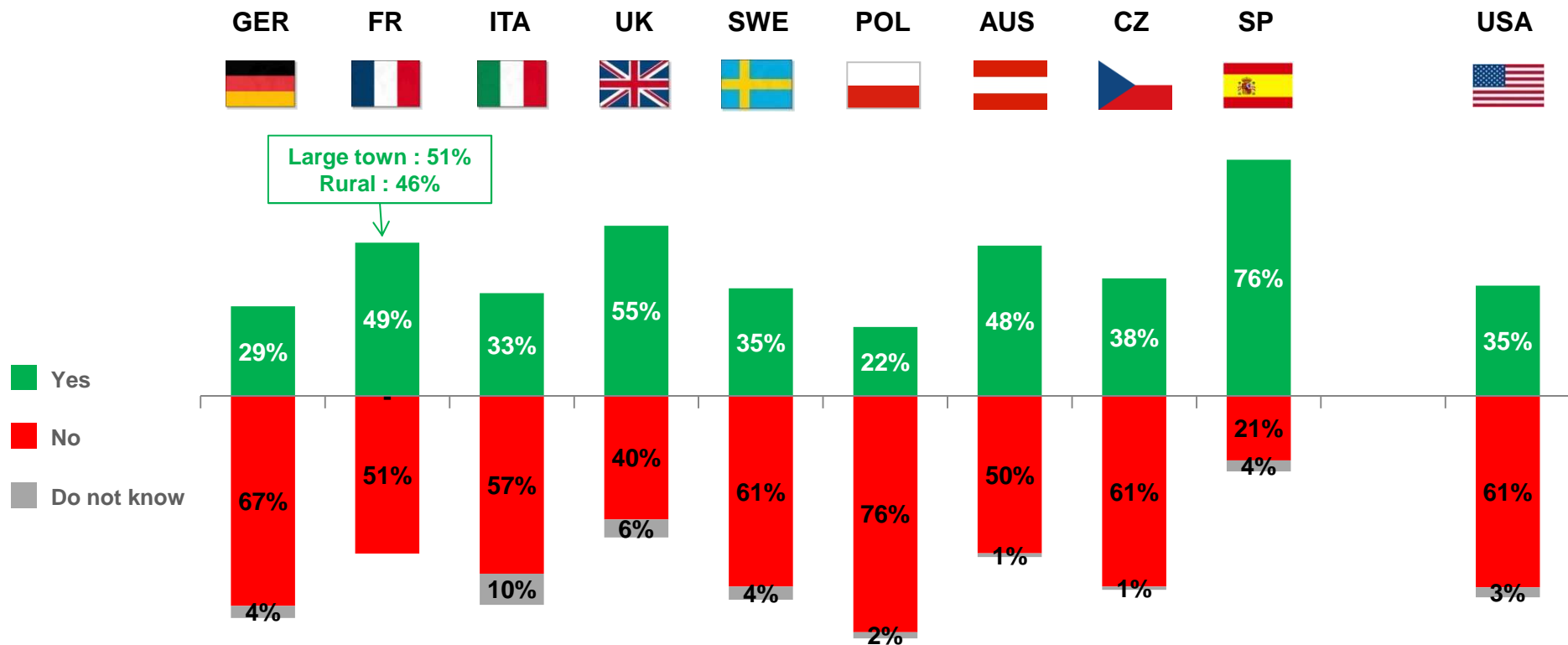


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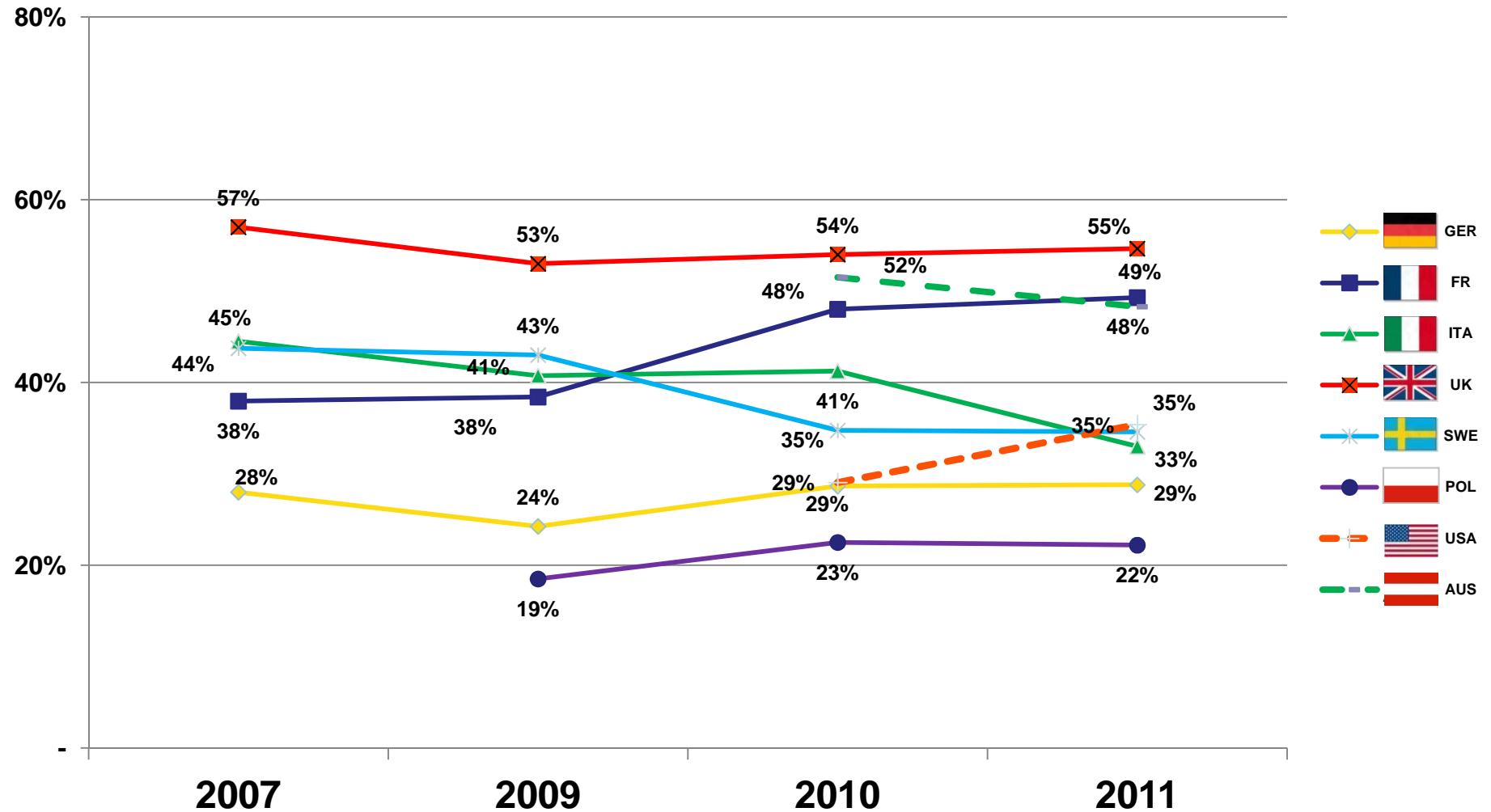
# Evaluation of equality in access to medical care

Does the current health system guarantee equal access to medical care for all citizens ?



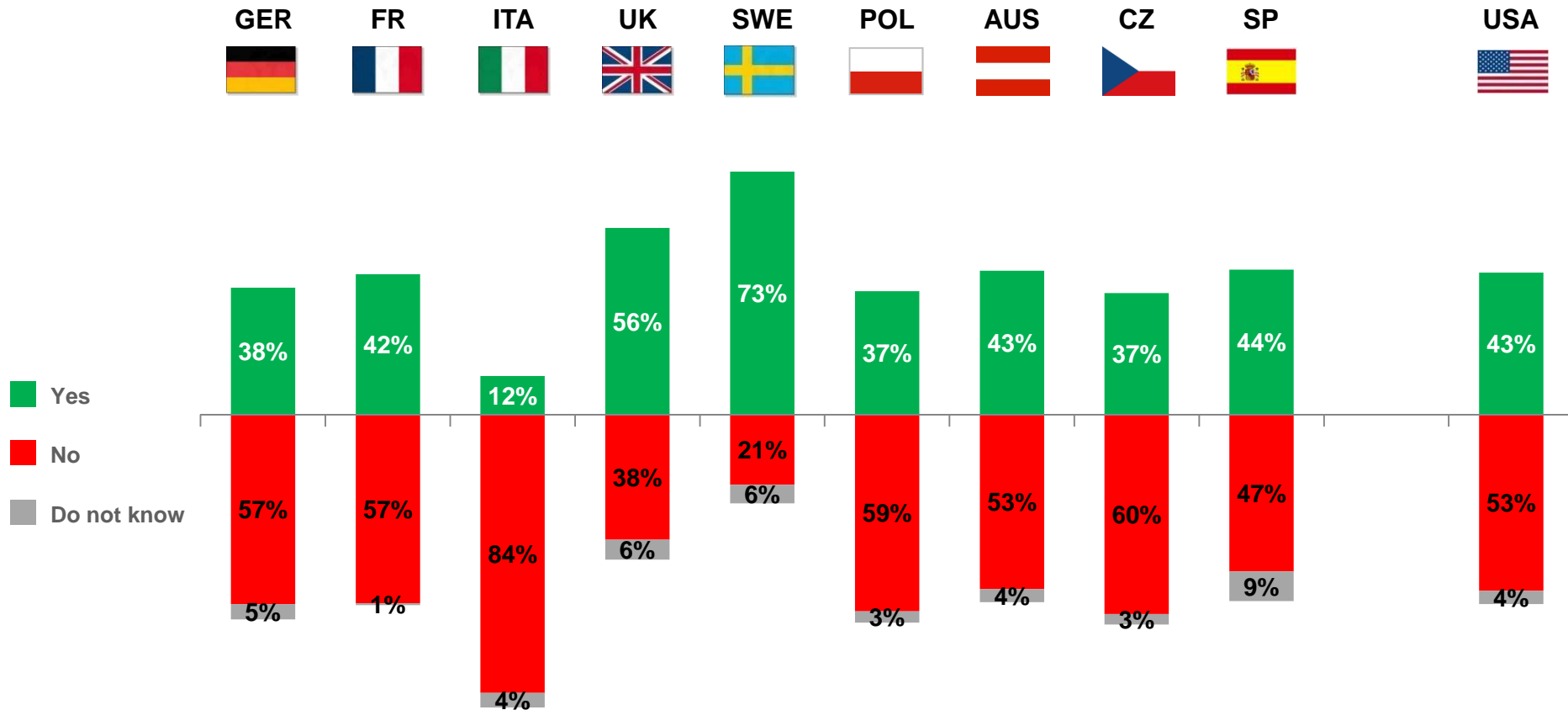
# Evaluation of equality in access to medical care- Evolution

Evolution since 2007 of the opinions on the equality in acces to medical care



# Funding of equality in access to medical care with taxes

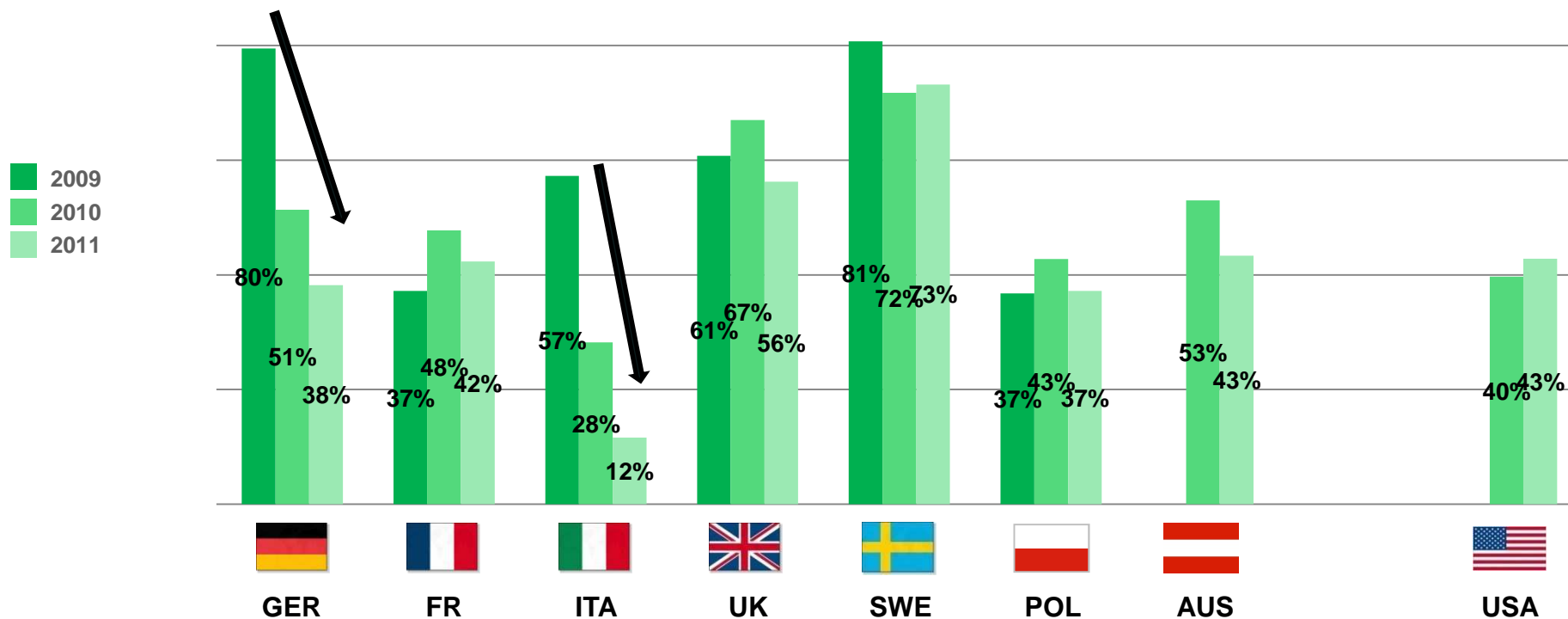
To reinforce equal access to health care, are you for or against an increase in contributions /taxes or compulsory contributions?



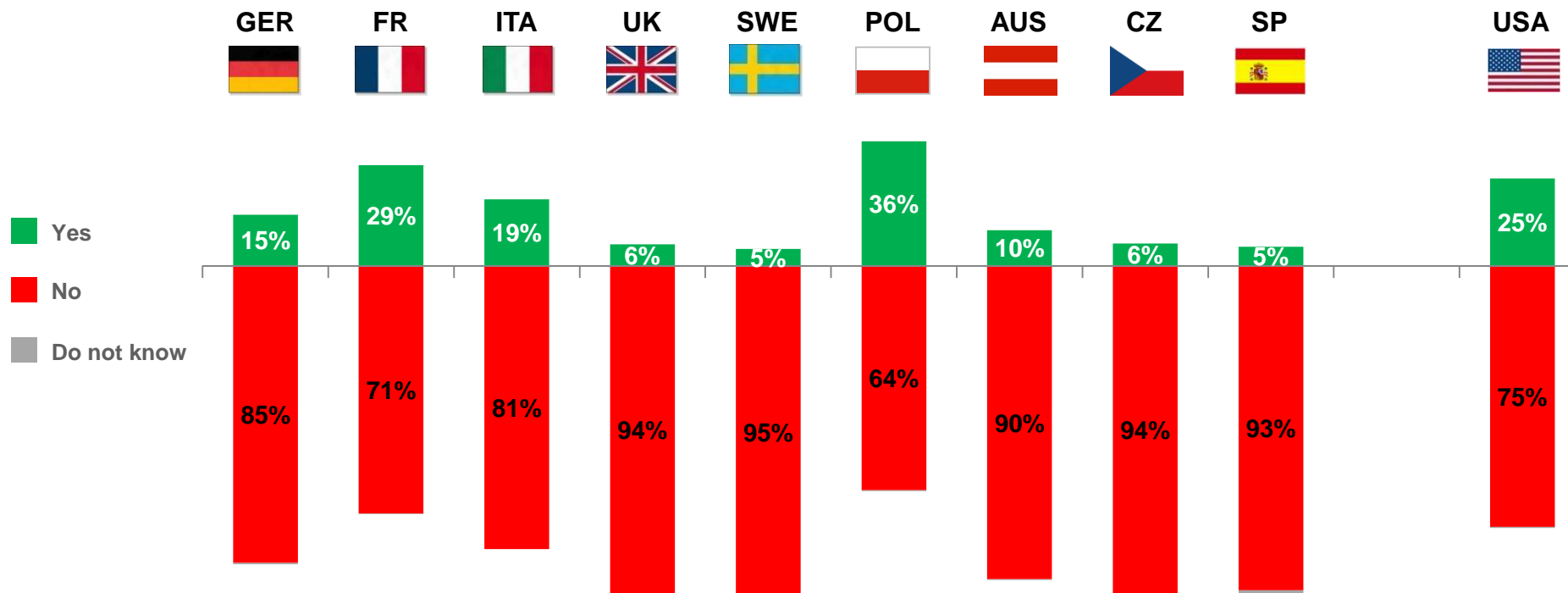
# Funding of equality in access to medical care with taxes - Evolution

To reinforce equal access to health care, are you for or against an increase in contributions /taxes or compulsory contributions?

2009-2011 evolution (% of "yes")



Over the course of the last year, did you decline or delay health care for yourself or a member of your household because of financial difficulties?



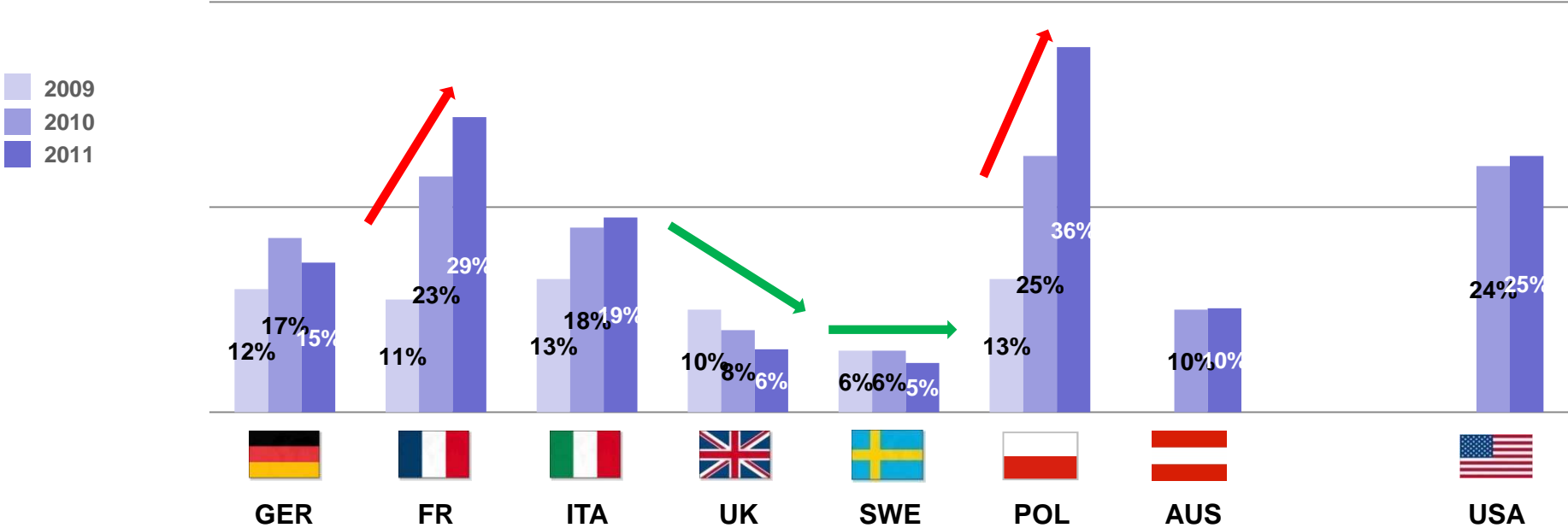
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# Health care decline - Evolution

Over the course of the last year, did you decline or delay health care for yourself or a member of your household because of financial difficulties?

2009-2011 evolution in % of "yes"













# Health care decline : care concerned

Over the course of the last year, did you decline or delay health care for yourself or a member of your household because of financial difficulties?

What type of care was it? ( Multi answers possible )

Base : Total

	GER	FR	ITA	UK	SWE	POL	AUS	CZ	SP	USA
										
<b>% of persons who declare having delayed or declined health cares</b>	15%	29%	19%	6%	5%	36%	10%	6%	5%	25%
<b>Types of care delayed or declined (multi answers possible)</b>										
• routine care	3%	12%	4%	1%	2%	13%	2%	1%	2%	13%
• purchase of medicine	3%	6%	3%	1%	0%	16%	1%	1%	1%	7%
• major procedures (surgery, costly examinations or	3%	5%	8%	0%	1%	11%	3%	2%	0%	7%
• dental or eye care	5%	22%	8%	4%	3%	18%	6%	3%	2%	11%

SPC + : 15 %  
SPC - : 28 %



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Over the course of the last year, did you decline or delay health care for yourself or a member of your household because of financial difficulties?

## What type of care was it? ( Multi answers possible )

Focus USA according the type of healthcare coverage

USA



Health care coverage	USA	Employer based	Self-purchased / Self-insured	Medicare	Medicaid	Not Insured	Military
<b>% of persons who declare having delayed or declined health cares</b>	25%	19%	30%	13%	47%	66%	11%
<b>Types of care delayed or declined ( multi answers possible)</b>							
Routine care	13%	9%	18%	6%	19%	39%	6%
Purchase of medicine	7%	4%	8%	6%	19%	17%	3%
Dental or eye care	11%	9%	12%	3%	19%	29%	9%
Major procedures	7%	7%	9%	3%	9%	13%	6%



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# Patients mobility for access to treatment

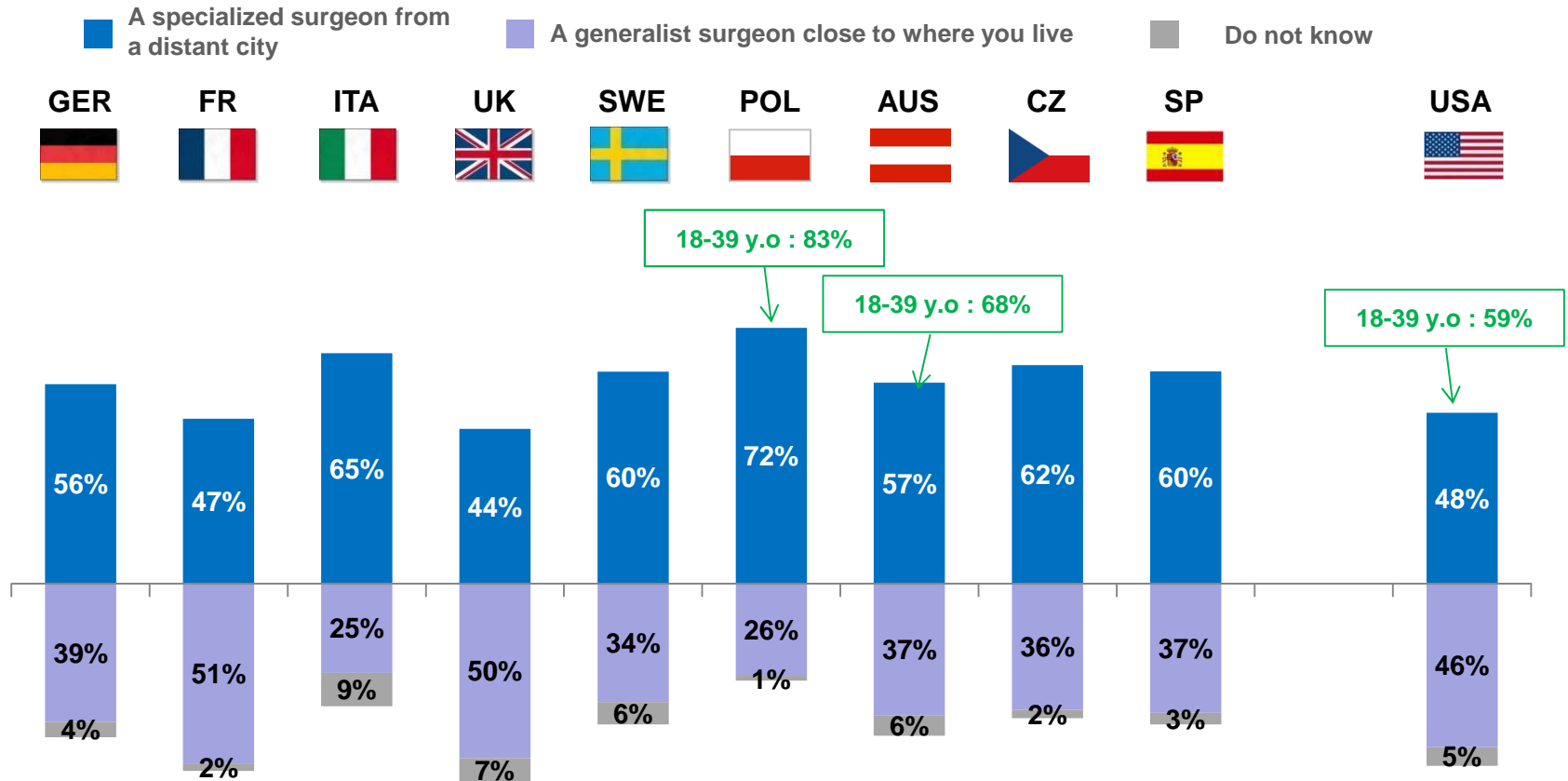


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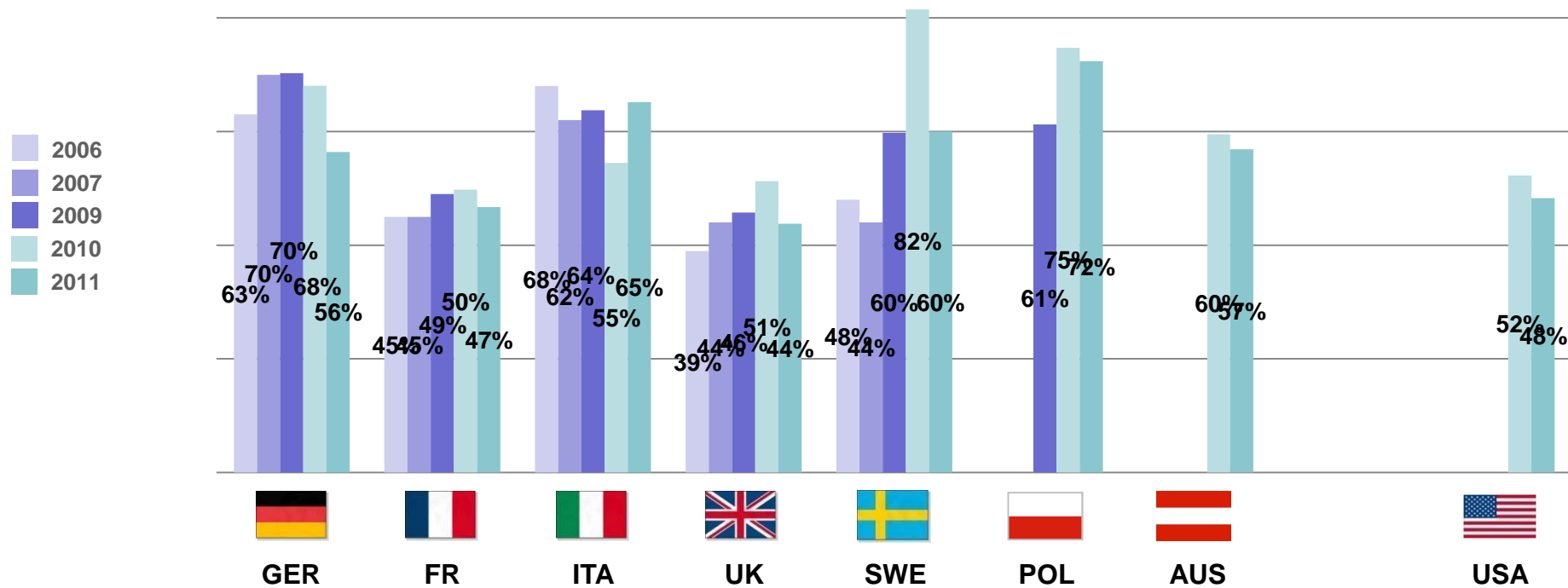
# Mobility and specialization

Imagine that you need surgery... would you prefer to go to



# Mobility and specialization - Evolution

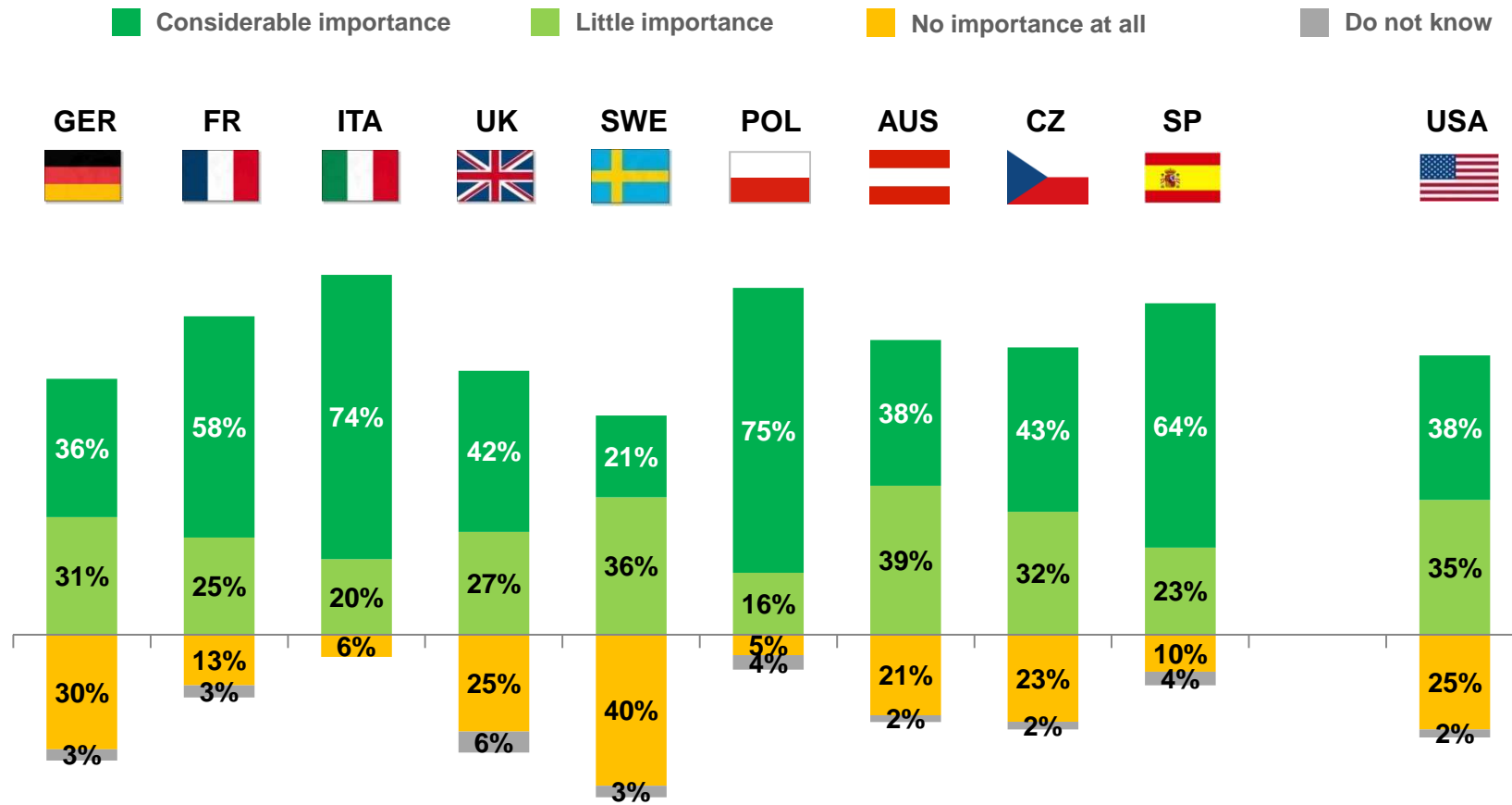
2006-2011 evolution in % of « A specialized surgeon from a distant city »



# Mobility and holiday destination

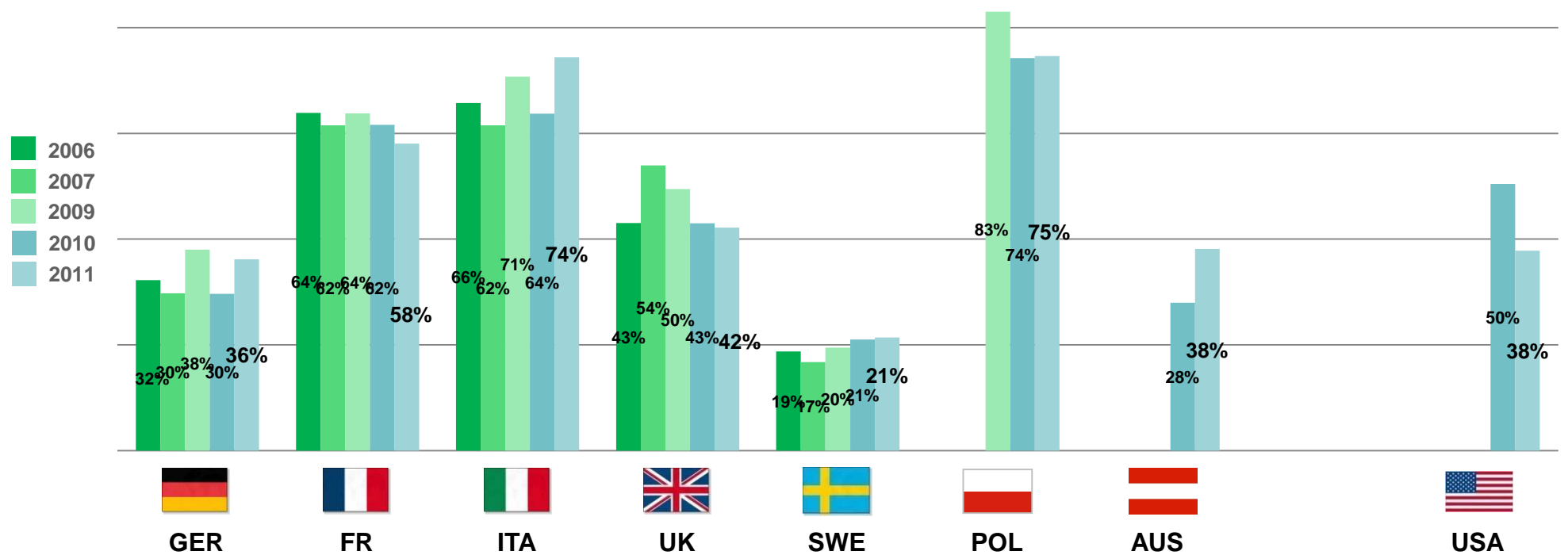
Imagine that you are choosing a holiday destination abroad

How much importance do you give to local health conditions when you are choosing your holiday destination?



# Mobility and holiday destination - Evolution

2006-2011 evolution in % of « Considerable importance »



# Management of ageing and dependent people

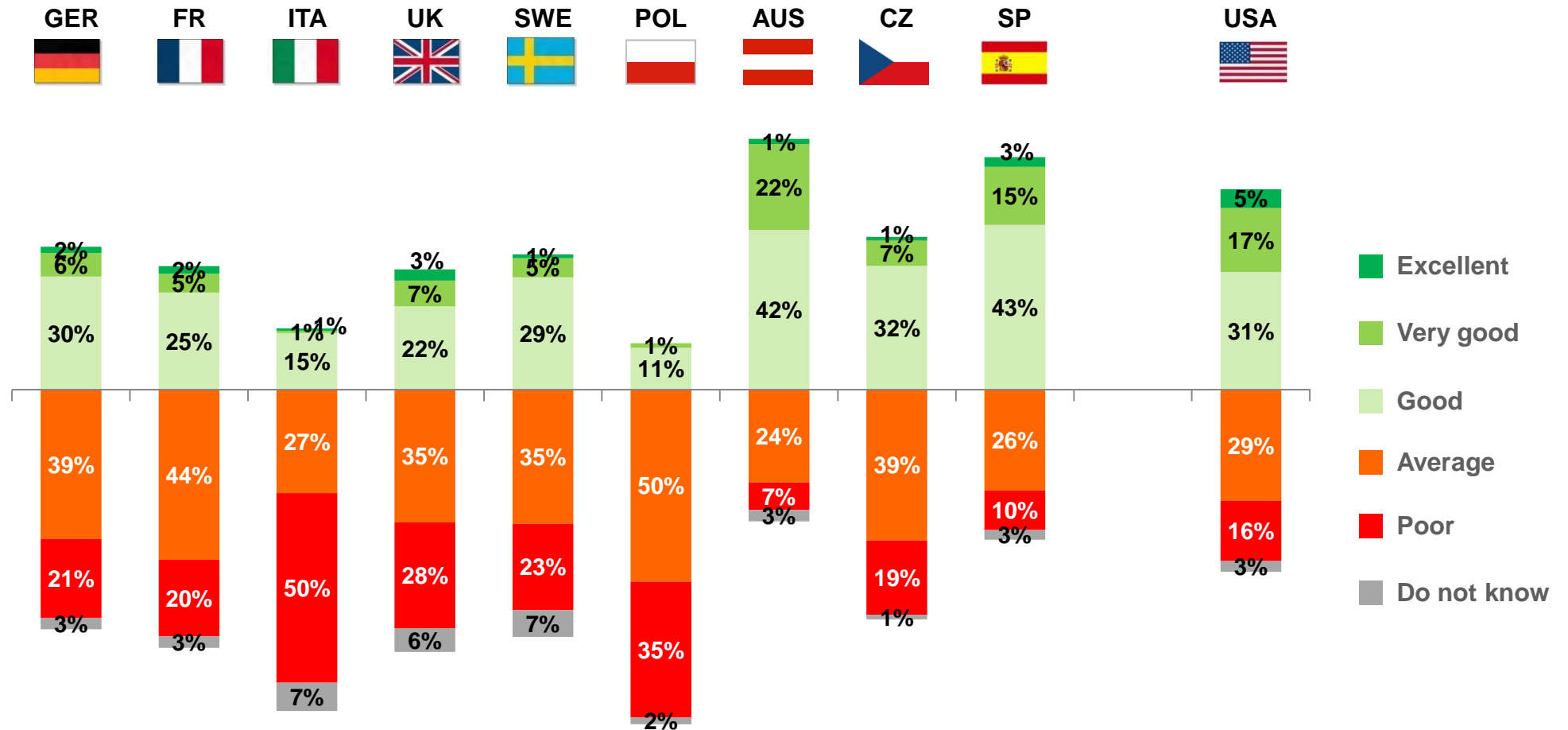


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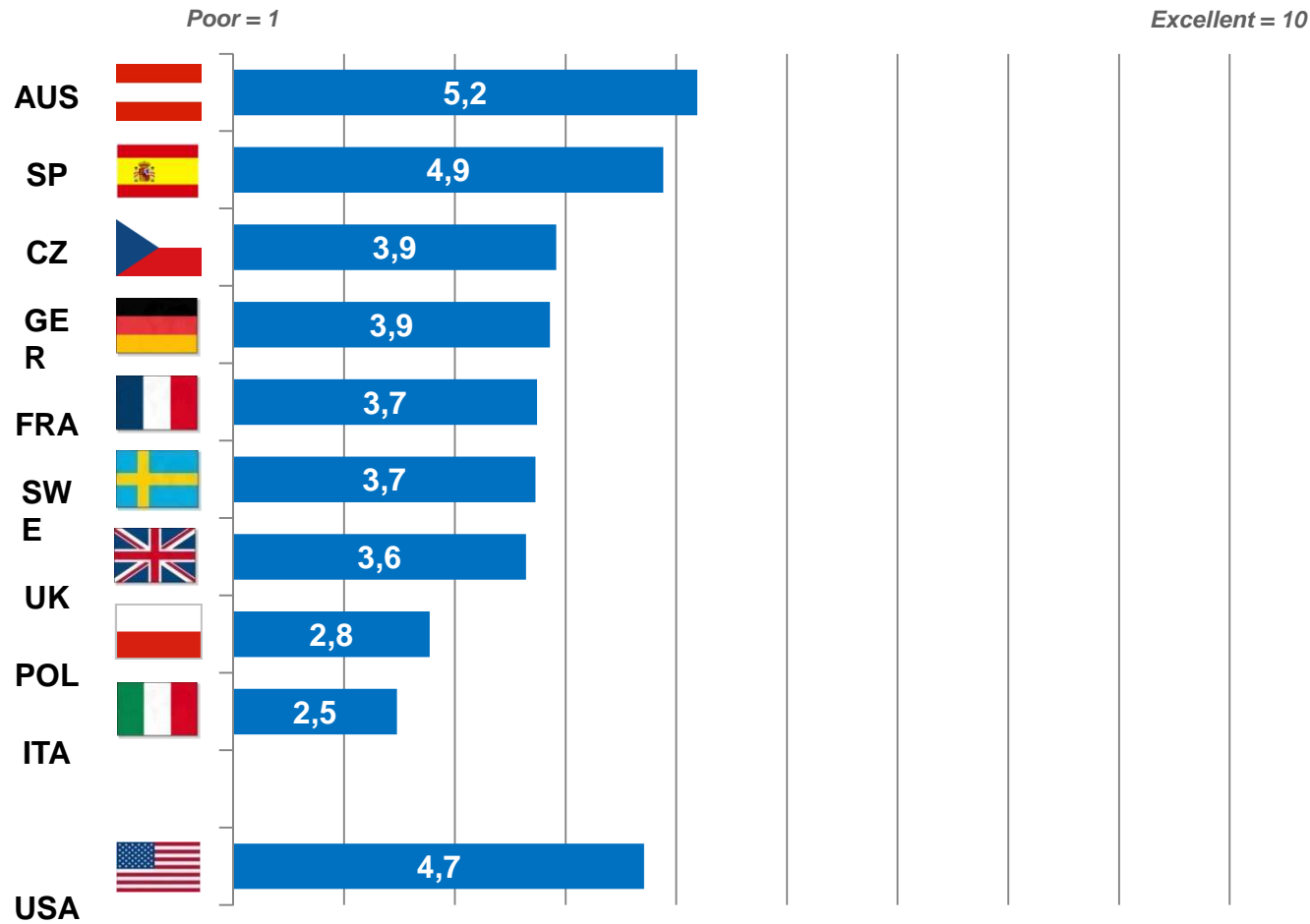
# Evaluation of the management of dependent / elderly people

In your opinion, is the organization and the quality of the management of dependent / elderly people:



# Evaluation of the management of dependent / elderly people - Scores

In your opinion, is the organization and the quality of the management of dependent / elderly people :

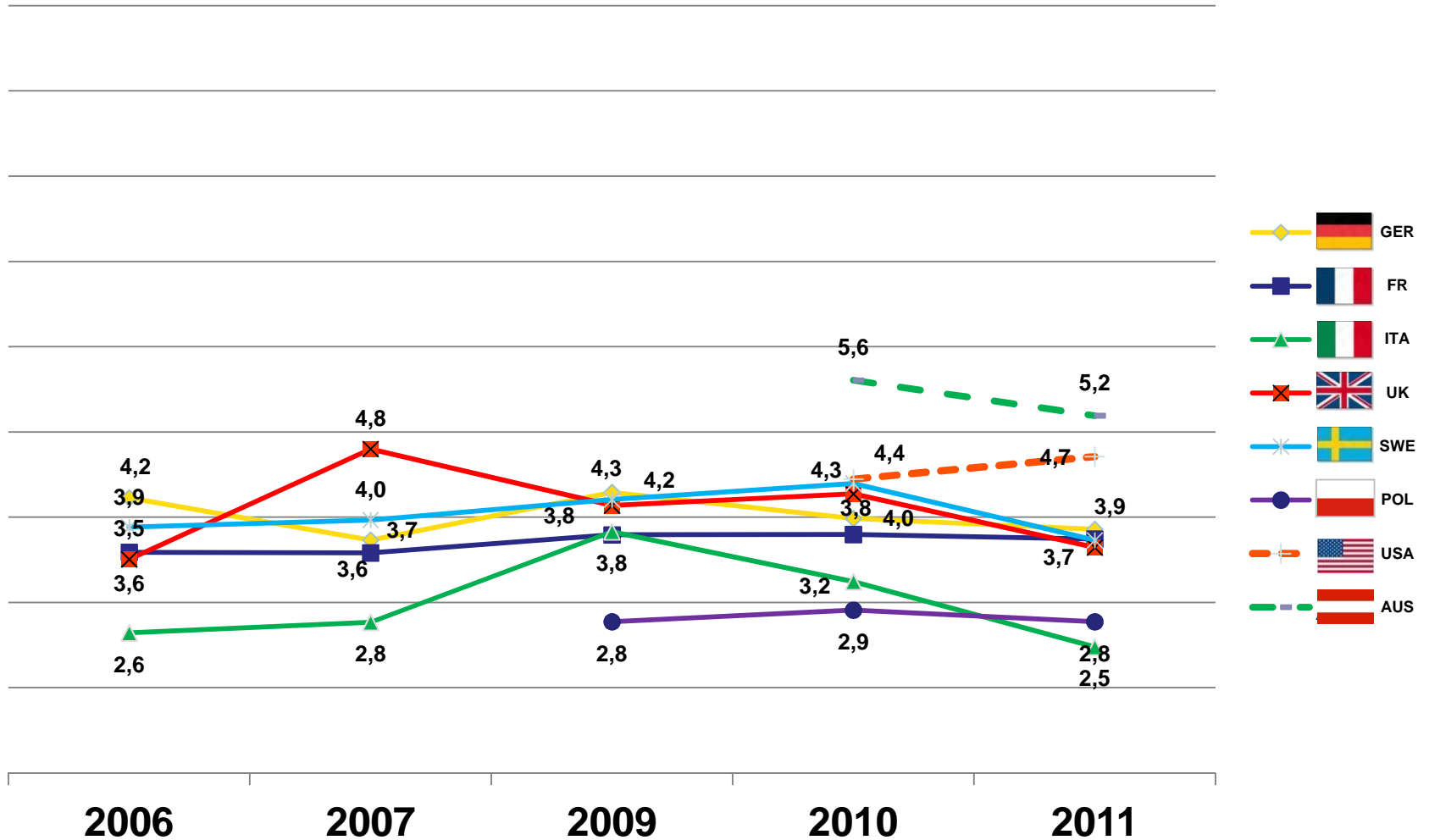


More negative categories	More positive categories
SPC - (3,5)	60+ y.o (4,2)
	18-39 y.o (4,0)
	Men (4,0)
	18-39 y.o (3,0)
SPC - (2,2)	18-39 y.o (2,8)
Women (4,5) Not Insured (4,2)	Men (5,0) 60+ y.o (4,9) Medicare (5,5)

# Evaluation of the management of dependent / elderly people - Evolution

In your opinion, is the organization and the quality of the management of dependent / elderly people:  
Evolution since 2006

Excellent = 10



Poor = 1

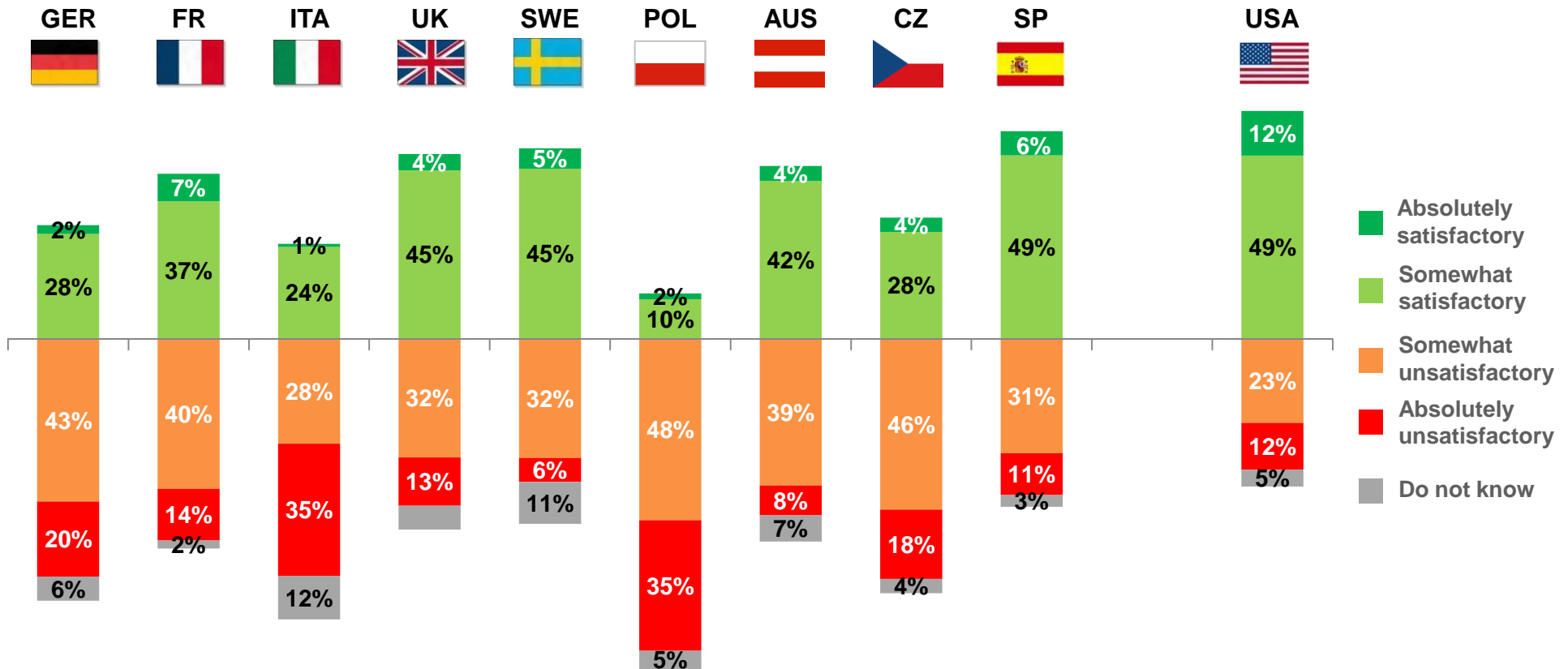


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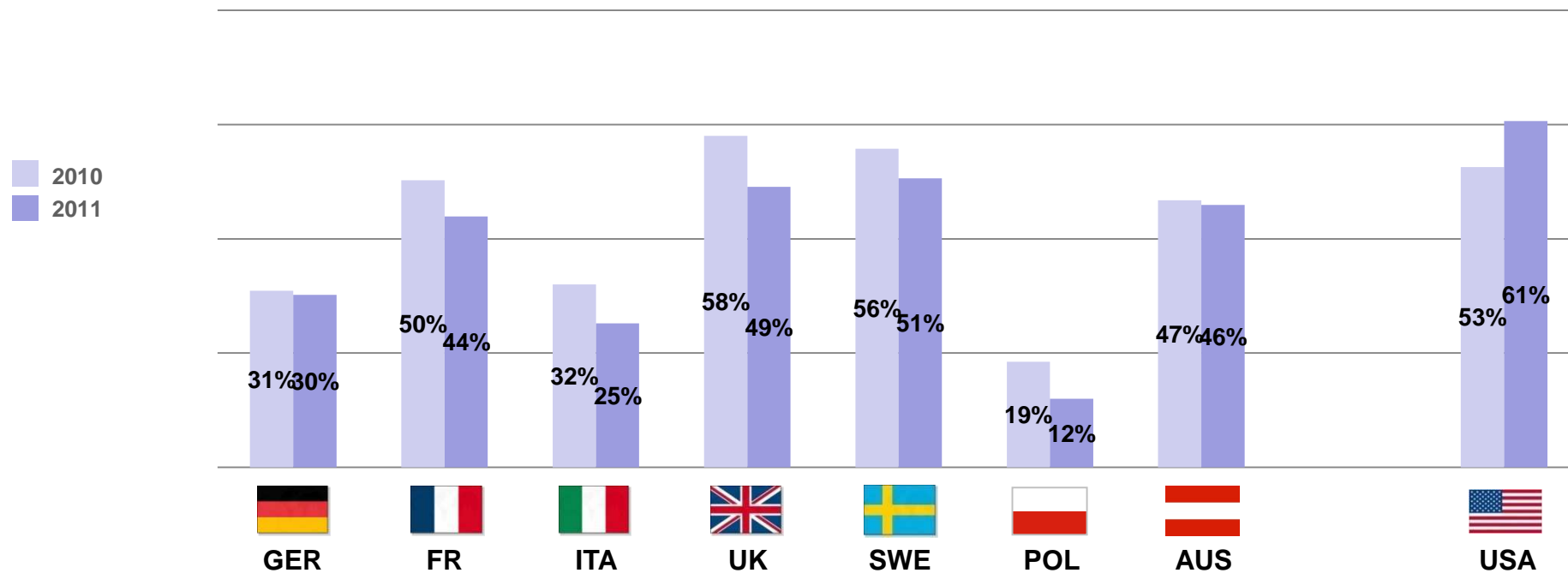
# Evaluation of public funding for dependency

Currently in our country, the public financial assistance provided to help dependent or elderly people stay in their homes is...

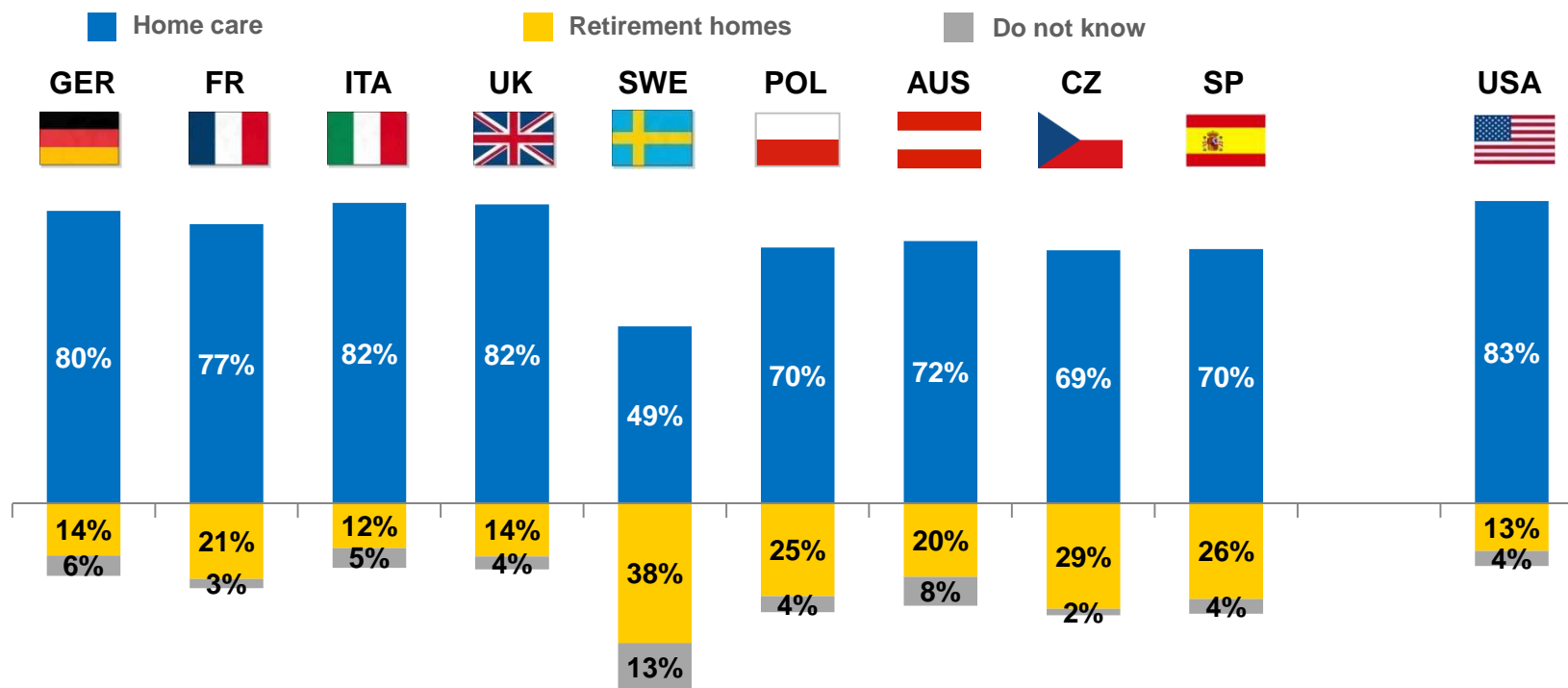


# Public funding for dependency - Evolution

2010-2011 evolution in % of « Absolutely satisfactory + Somewhat satisfactory »



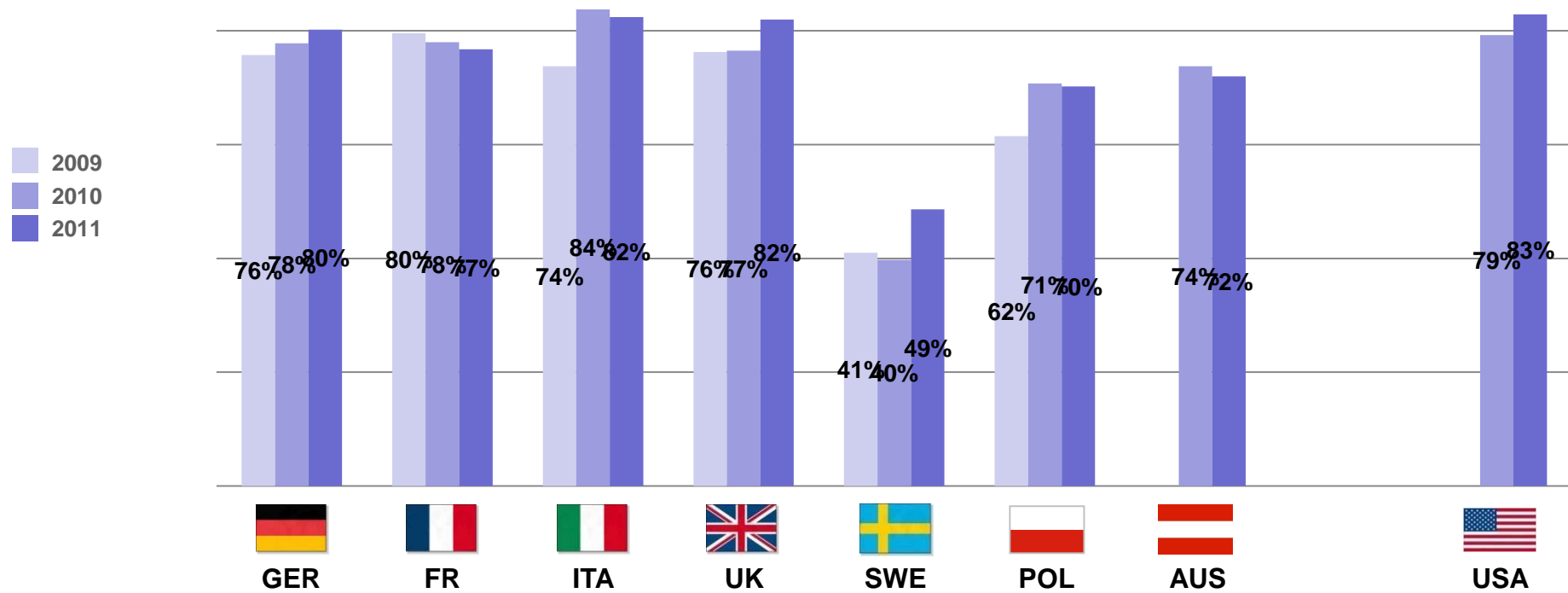
Given the problems raised by increasing life spans and the rise in the number of dependent elderly people, which of the following should be our priority today?



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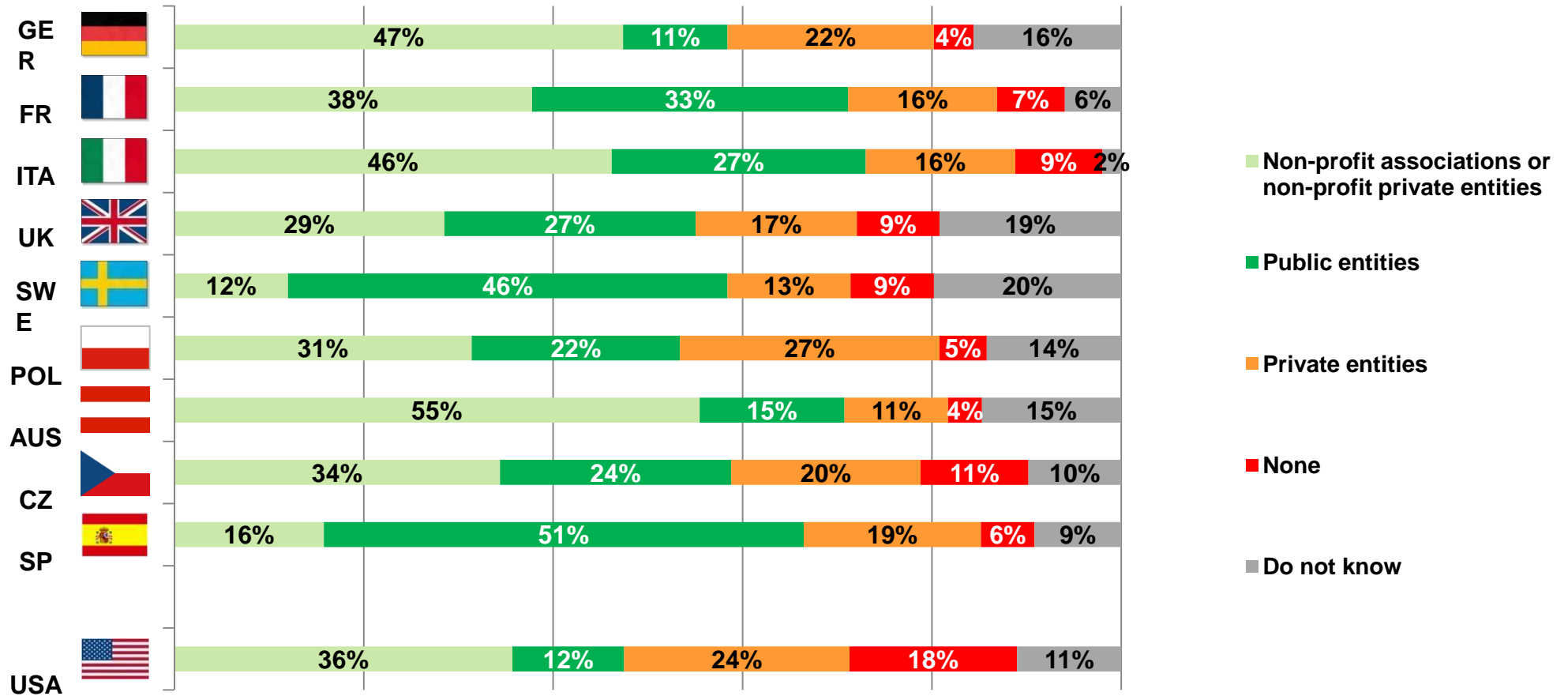


2009-2011 evolution in % of « home care »



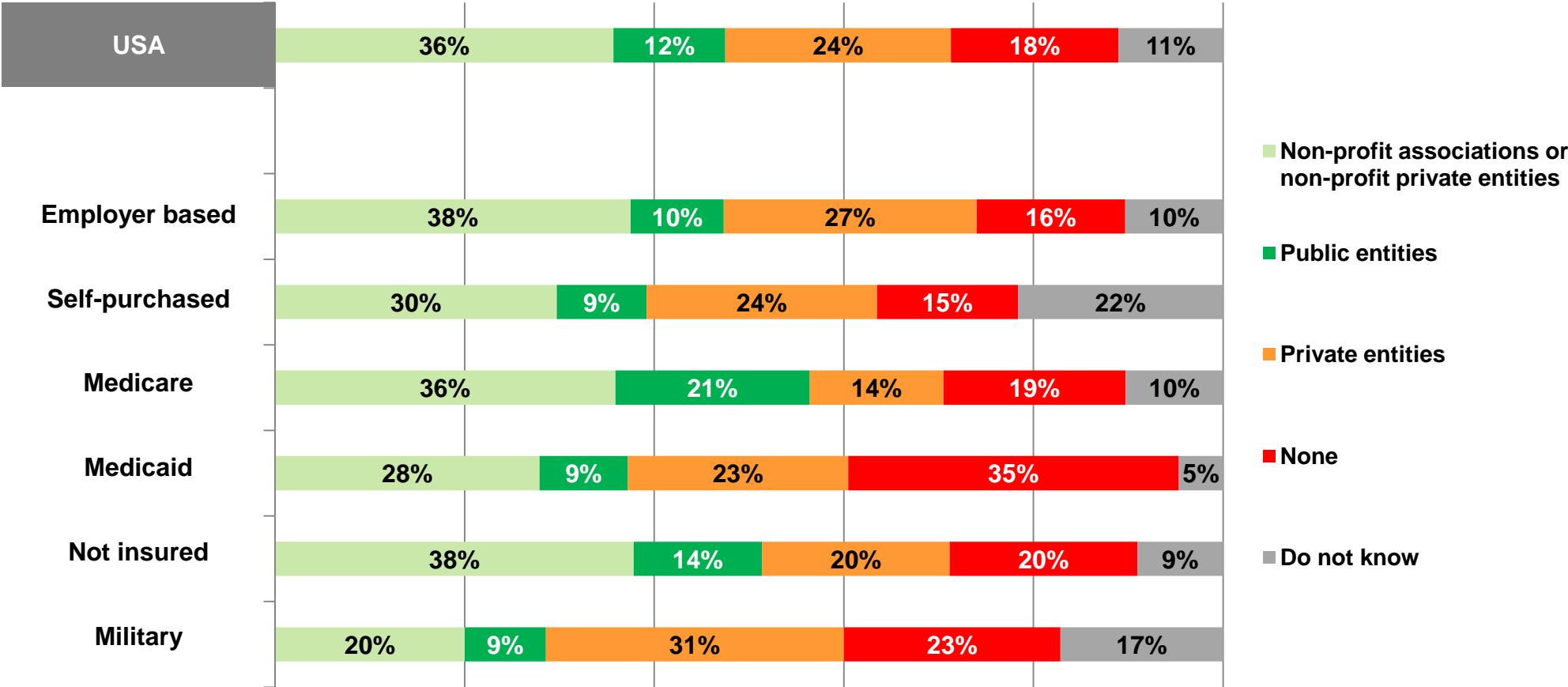
# Dependency – Origin of supports

Outside of their families, which organisation provides dependent elderly people with the best support to help them stay in their homes?



# Dependancy – Origin of supports (Focus USA)

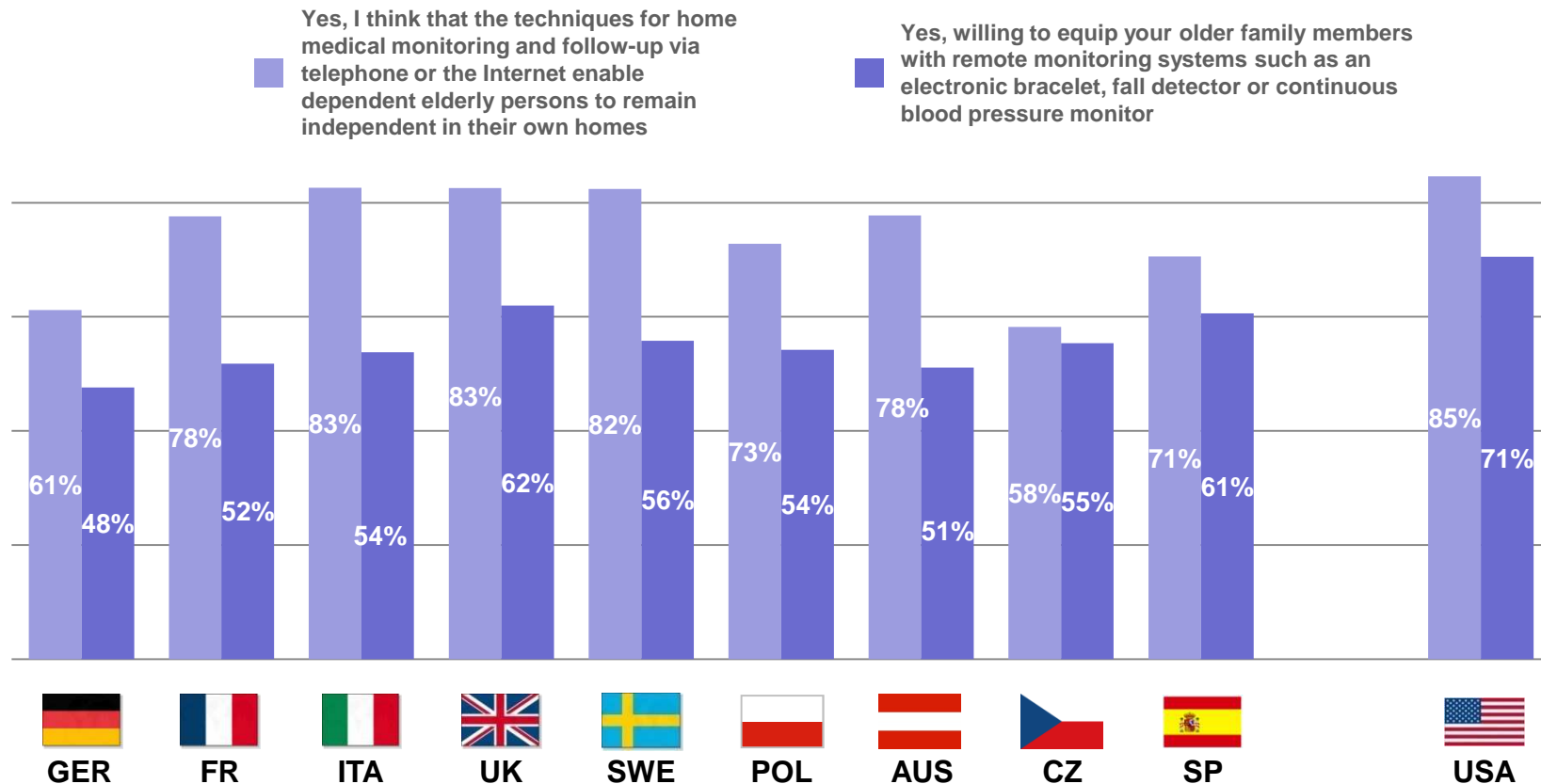
Outside of their families, which organisation provides dependent elderly people with the best support to help them stay in their homes?



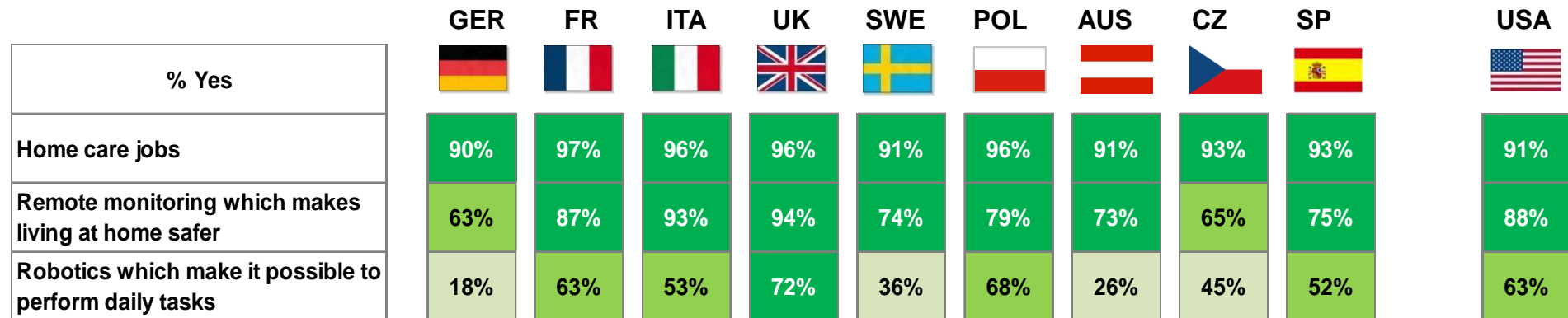
# Home care and medical monitoring

*Do you think that the techniques for home medical monitoring and follow-up via telephone or the Internet enable dependent elderly persons to remain independent in their own homes?*

*Are you willing to equip your older family members with remote monitoring systems such as an electronic bracelet, fall detector or continuous blood pressure monitor to make life at home safer for them?*

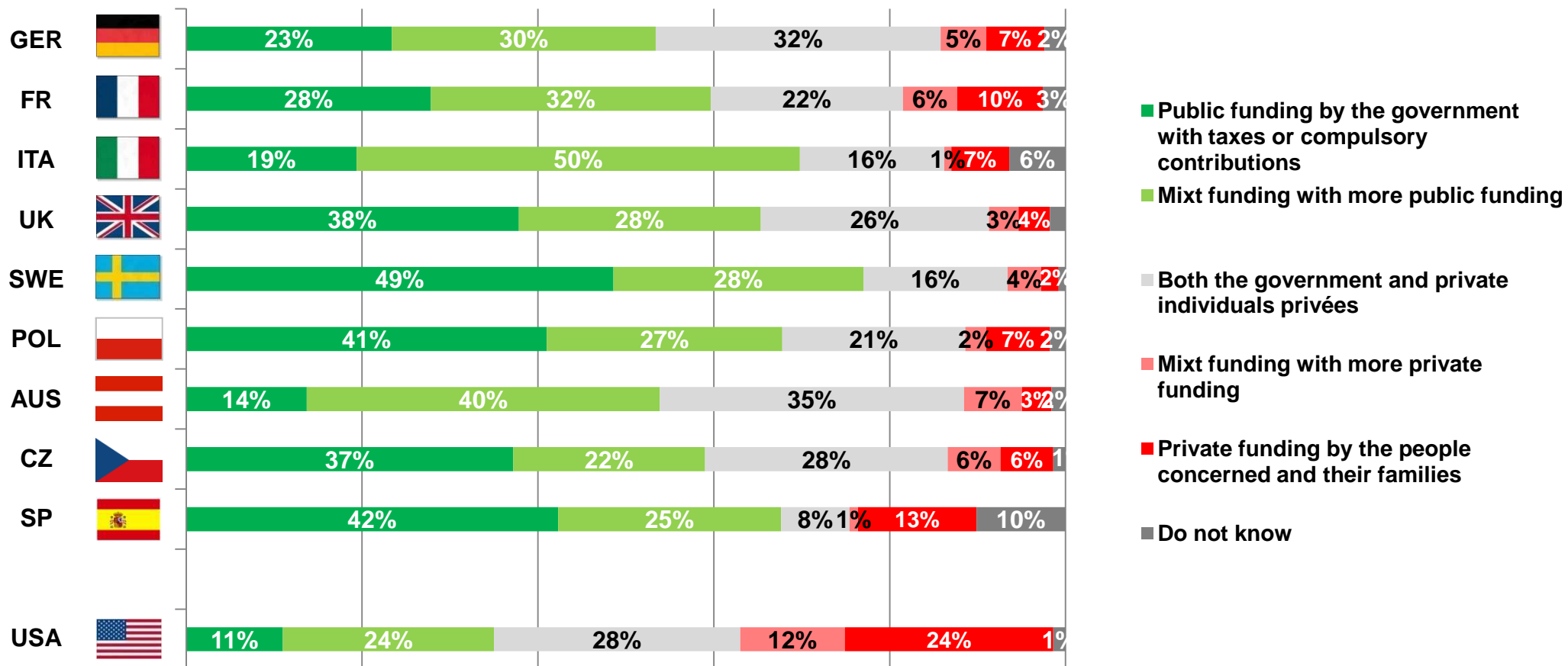


To help dependent elderly people stay in their homes, do you think we must develop...?



# Home care funding

*In your opinion, who should pay for the services and assistive devices which make it possible to meet the daily needs of elderly and dependent persons?*

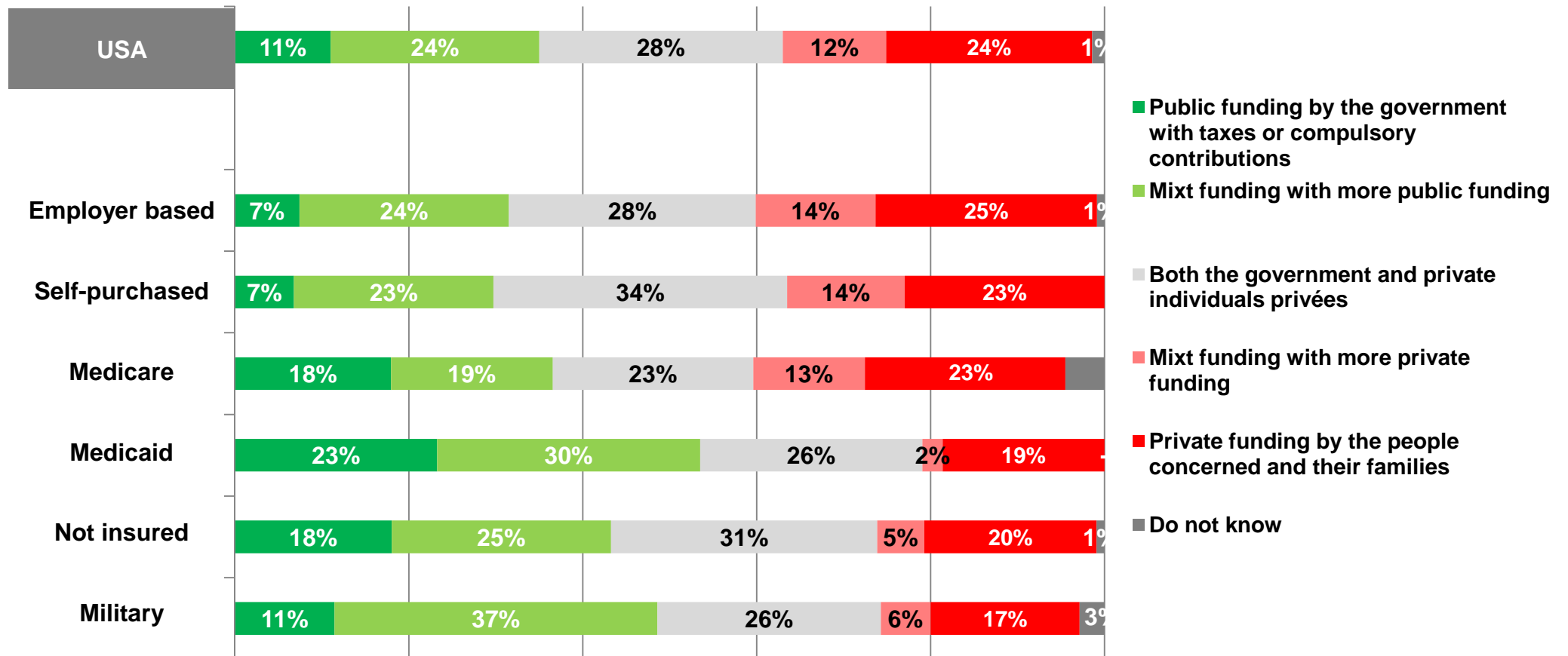


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# Home care funding – Focus USA

*In your opinion, who should pay for the services and assistive devices which make it possible to meet the daily needs of elderly and dependent persons?*













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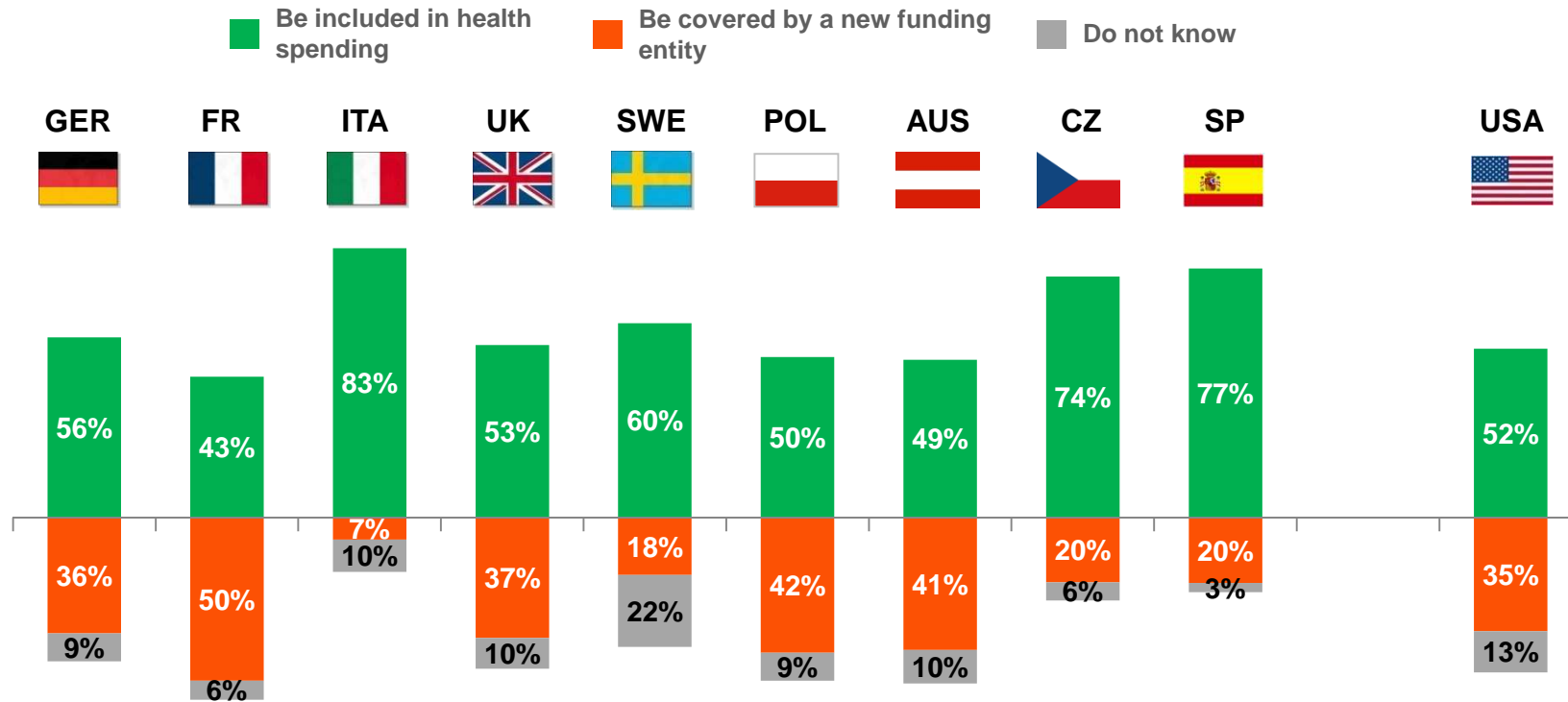
# Home care funding : differences

## Differences of opinions in countries according to persons categories

		<b>More in favor of <i>private</i> funding</b>	<b>More in favor of <i>mixt</i> funding</b>	<b>More in favor of <i>public</i> funding</b>
AUS		No significant differences	No significant differences	No significant differences
SP		<b>SPC+ : 19%</b>	No significant differences	No significant differences
CZ		No significant differences	<b>SPC+ : 63%</b>	<b>Inactives : 46%</b>
GER		No significant differences	No significant differences	No significant differences
FRA		No significant differences	<b>SPC+ : 68%</b>	<b>Inactives : 34%</b> <b>Men : 32%</b>
SWE		No significant differences	No significant differences	No significant differences
UK		No significant differences	No significant differences	<b>60 + UK : 51%</b>
POL		No significant differences	No significant differences	No significant differences
ITA		No significant differences	No significant differences	No significant differences
USA		<b>SPC+ : 27%</b> <b>Men : 27%</b>	<b>SPC - : 68%</b> <b>Women : 67%</b>	No significant differences

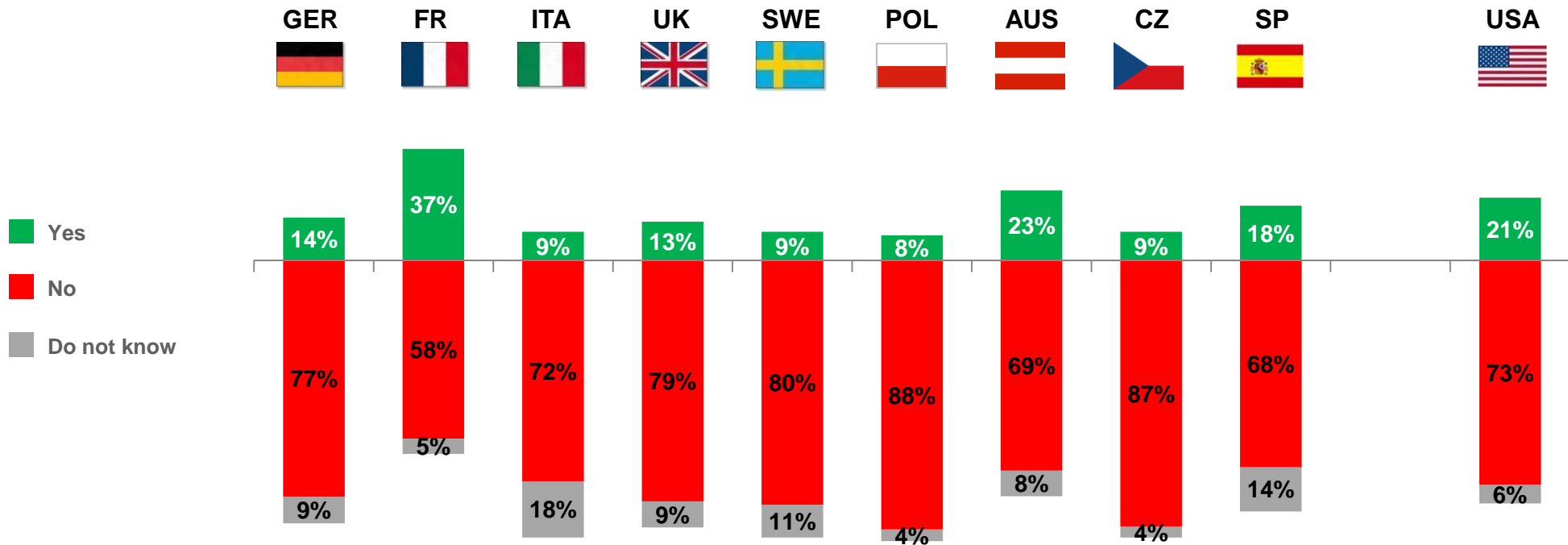
# Dependency funding organization

*In your opinion, the collective funding of services and assistive devices which make it possible to meet the daily needs of elderly and dependent persons should...*



# The challenge of dependency

*In your opinion, has the government in your country taken the full measure of the challenge of dependency?*



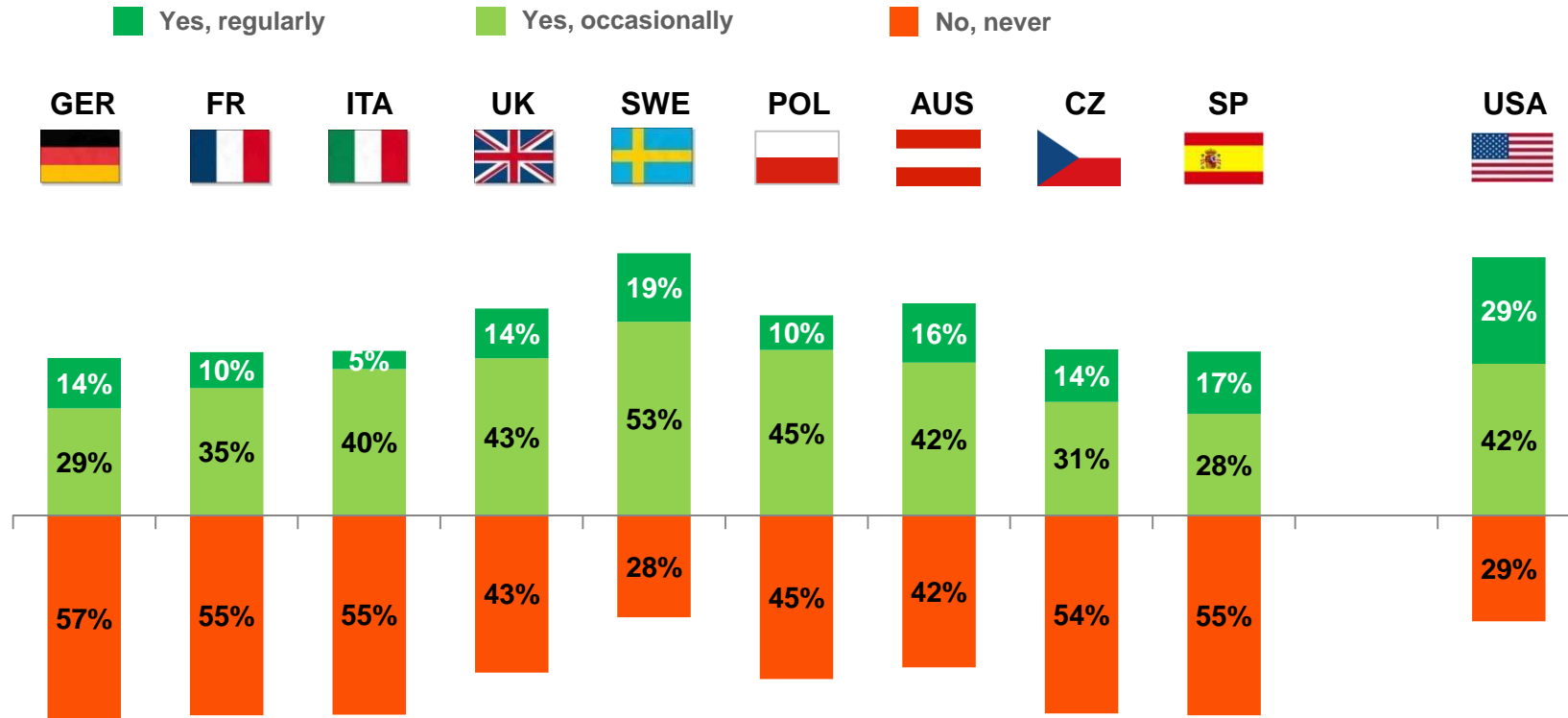
**New technologies**



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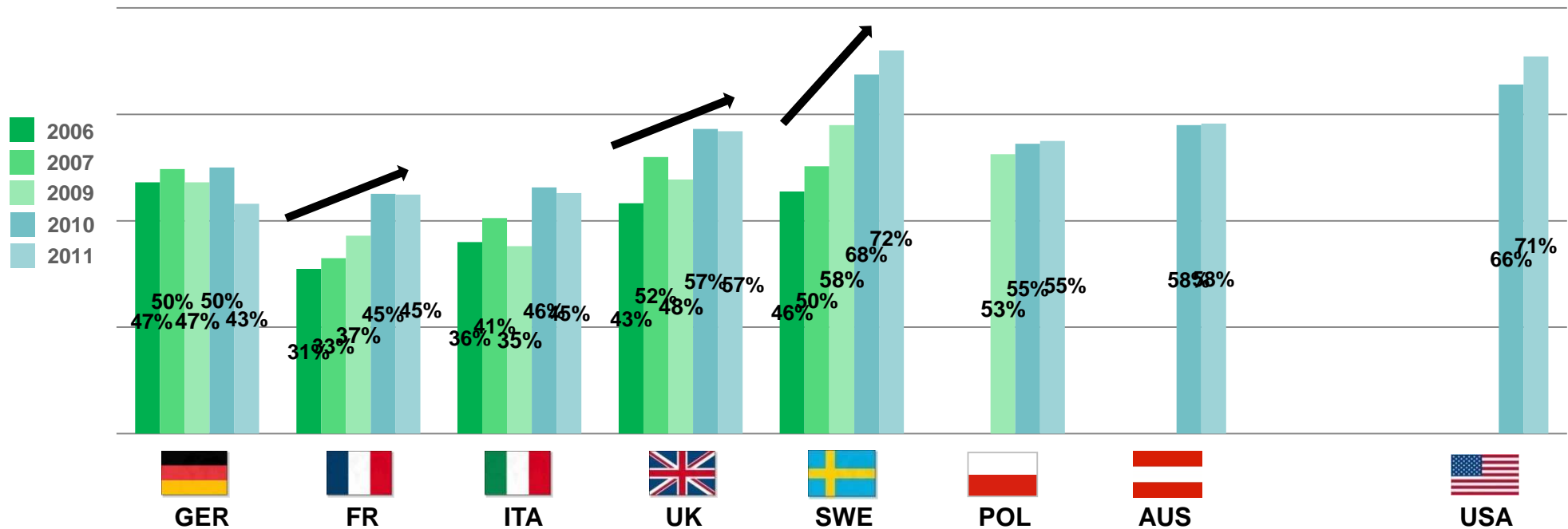
Do you use the Internet for information relating to healthcare ?



# Informations on the Internet - Evolution

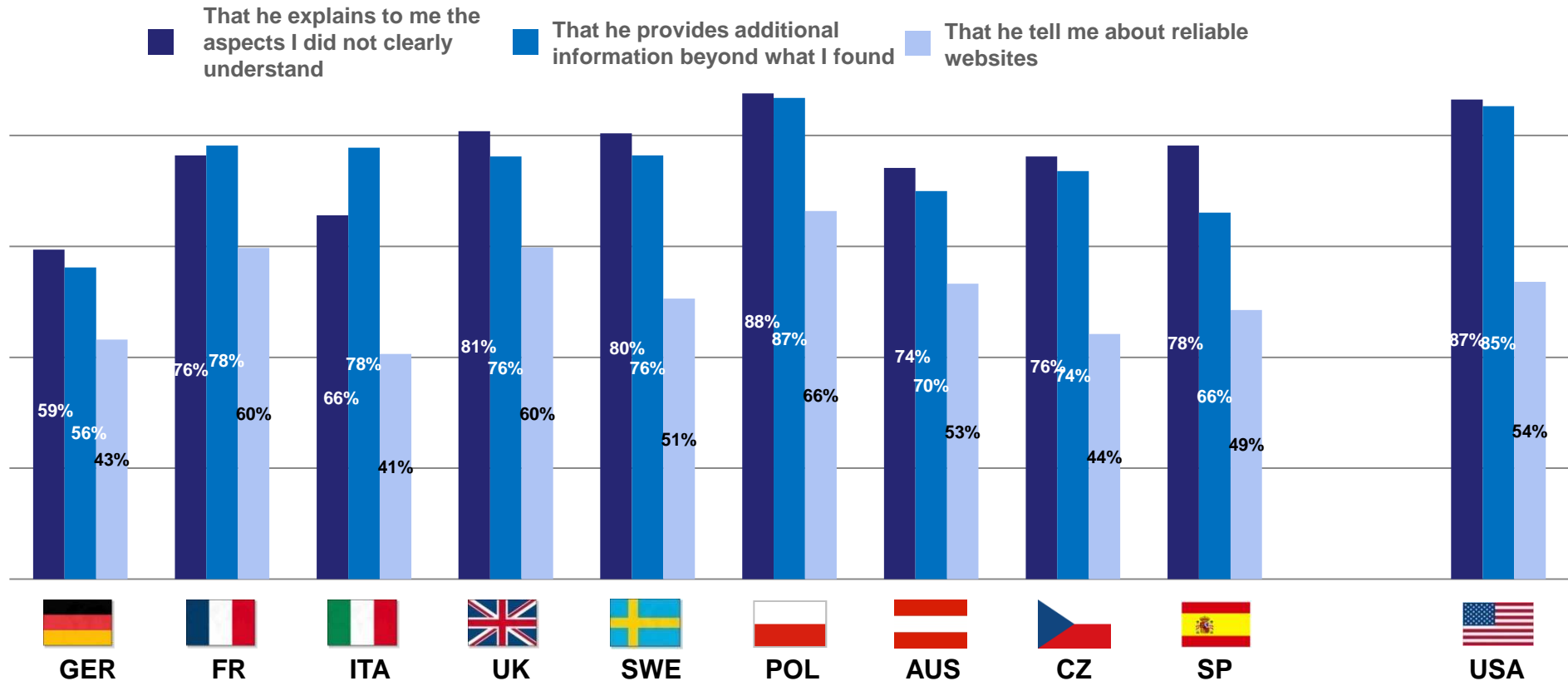
Do you use the Internet for information relating to healthcare ?

2006-2011 evolution in % of sub-total « Yes, regularly » and « Yes, occasionally ».



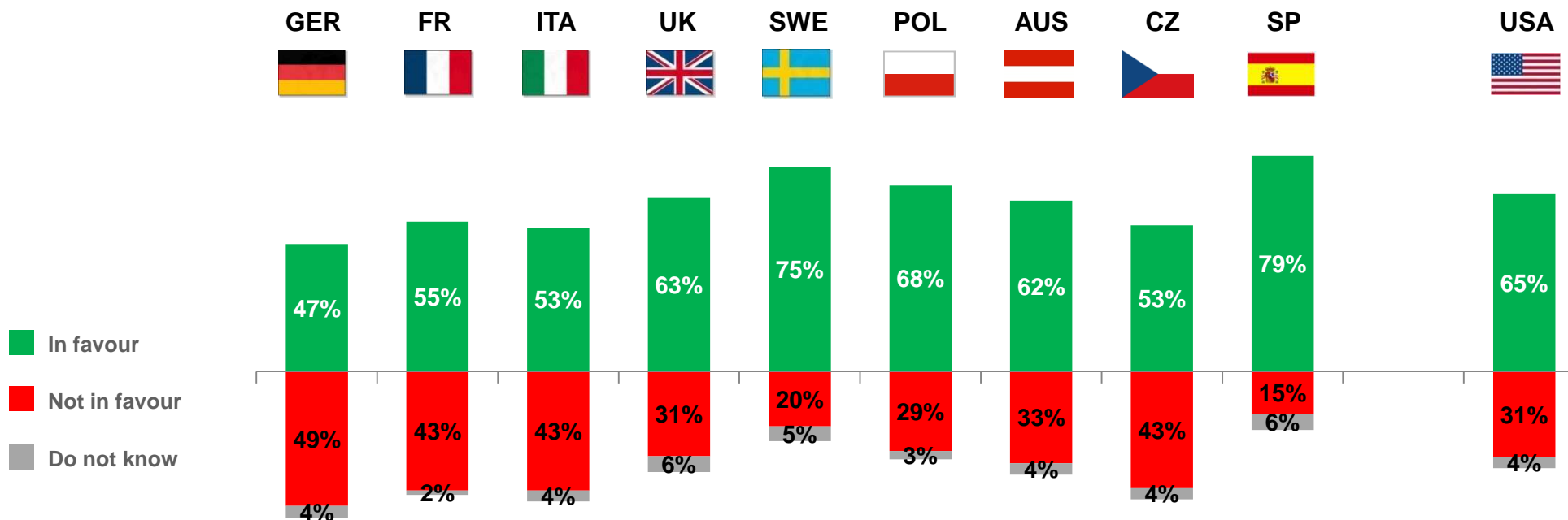
# Doctor and informations on the Internet

What do you expect from your doctor with regard to health information available on the Internet?



# Continuous in-home monitoring over mobile phone

Are you in favour or not in favour of the development of continuous in-home monitoring resources over mobile phone (example: daily blood sugar control, measurement of blood pressure and heart rate)?

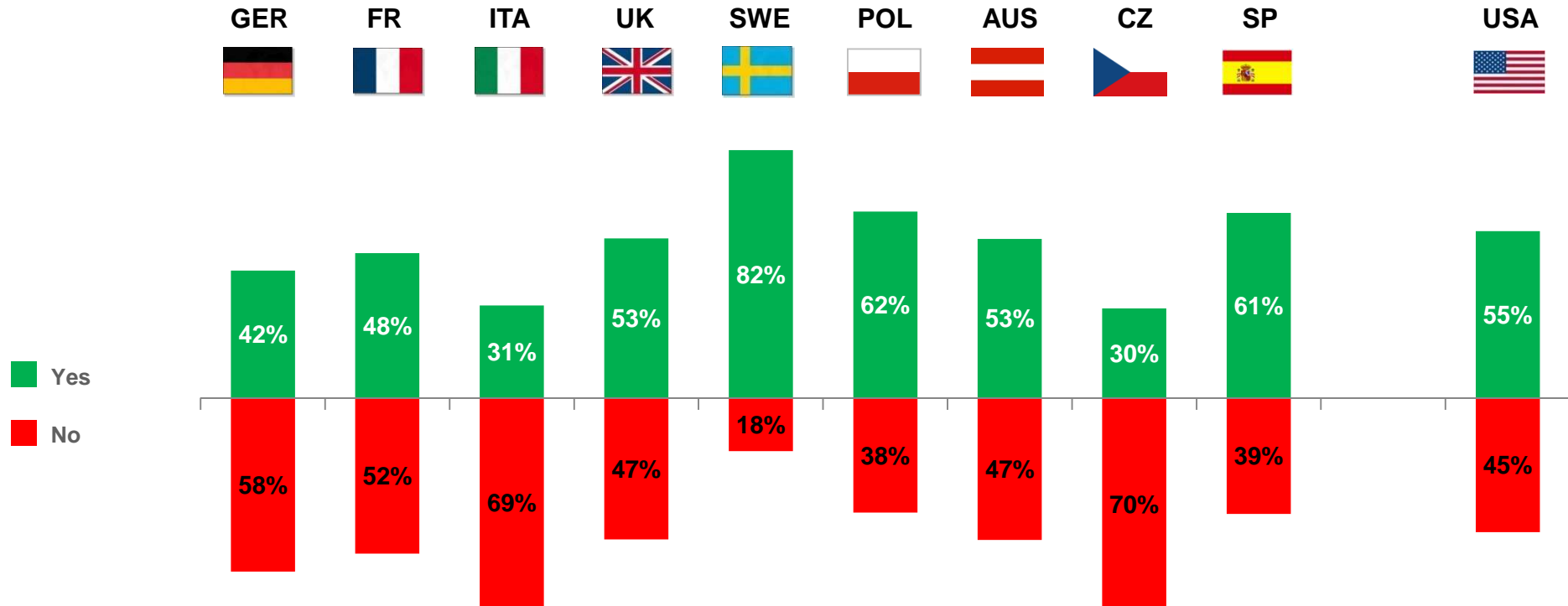


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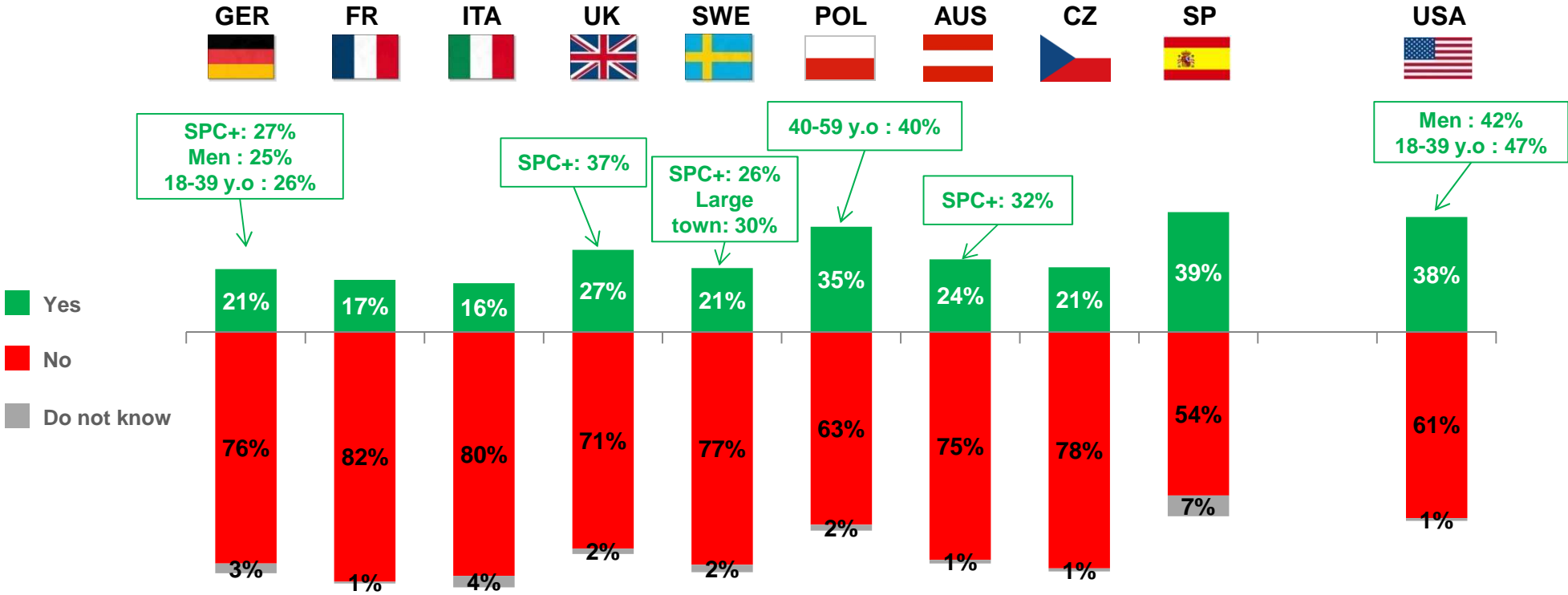
# Medical second opinion and Internet

To obtain a medical second opinion, it is now possible to have your medical file analysed remotely over the Internet by a specialised physician. Would you consider doing this?



# Remote medical consultation

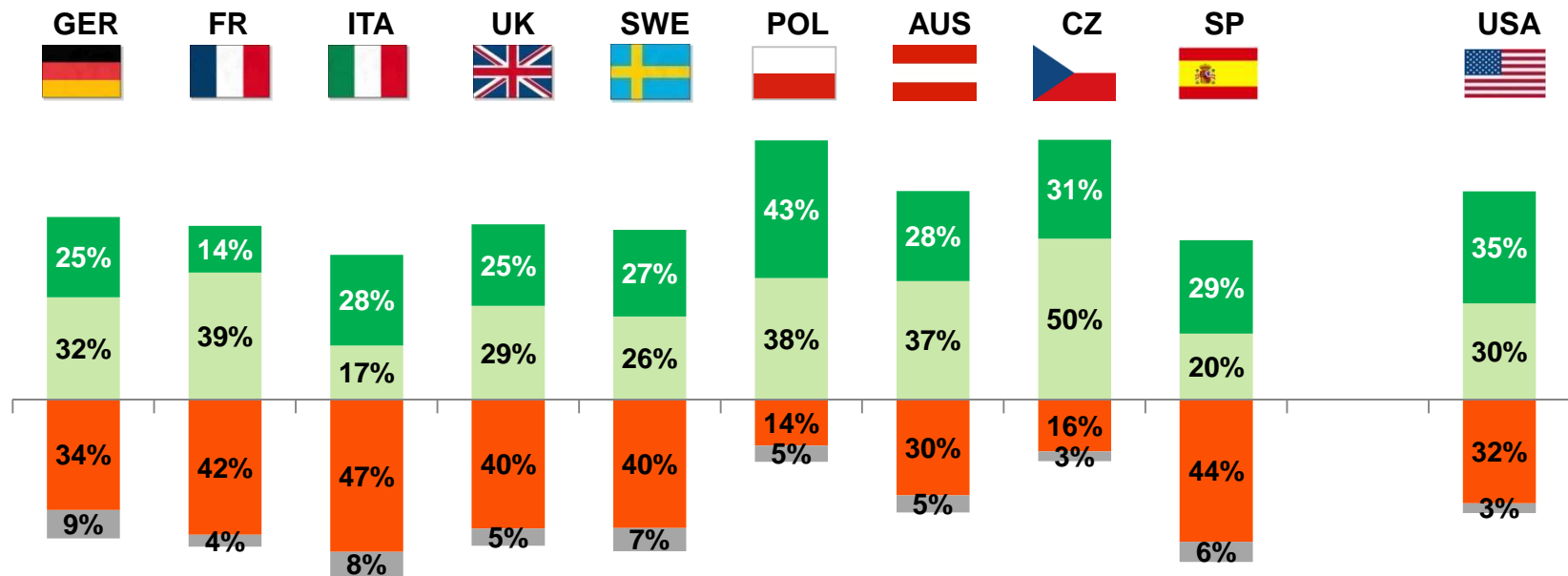
Would you consider having a medical consultation with a general practitioner remotely over the Internet with a webcam?



# Doctor / patient relationship and remote medical consultation

Do you think that the use of new technologies such as teleconsultation, the Internet and mobile phones for medical monitoring will improve, weaken or not change the doctor-patient relationship?

■ Improve the doctor-patient relationship   
 ■ Not change it   
 ■ Weaken the doctor-patient relationship   
 ■ Do not know



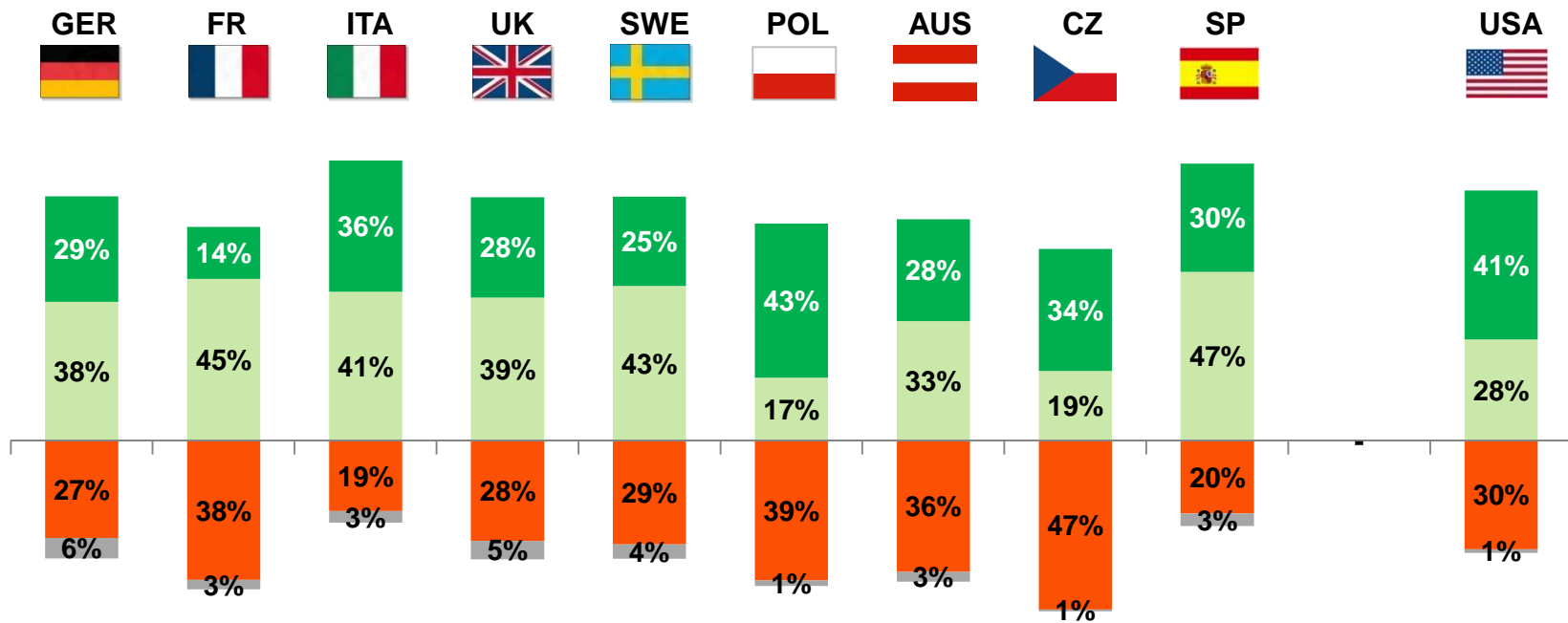
Improve - weaken	GER	FR	ITA	UK	SWE	POL	AUS	CZ	SP	USA
	-9	-28	-19	-15	-13	+29	-2	+15	-15	+3

# Doctor / patient relationship and remote medical consultation

## Focus on 18-39 years old

Do you think that the use of new technologies such as teleconsultation, the Internet and mobile phones for medical monitoring will improve, weaken or not change the doctor-patient relationship?  
Focus on 18-39 y.o.

■ Improve the doctor-patient relationship
 ■ Not change it
 ■ Weaken the doctor-patient relationship
 ■ Do not know



Improve - weaken	+2	-24	+17	0	-4	+4	-8	-13	+10		+9
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Prevention

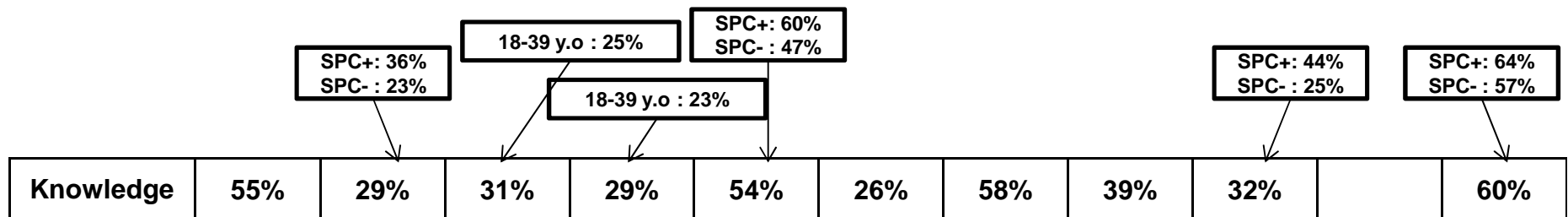
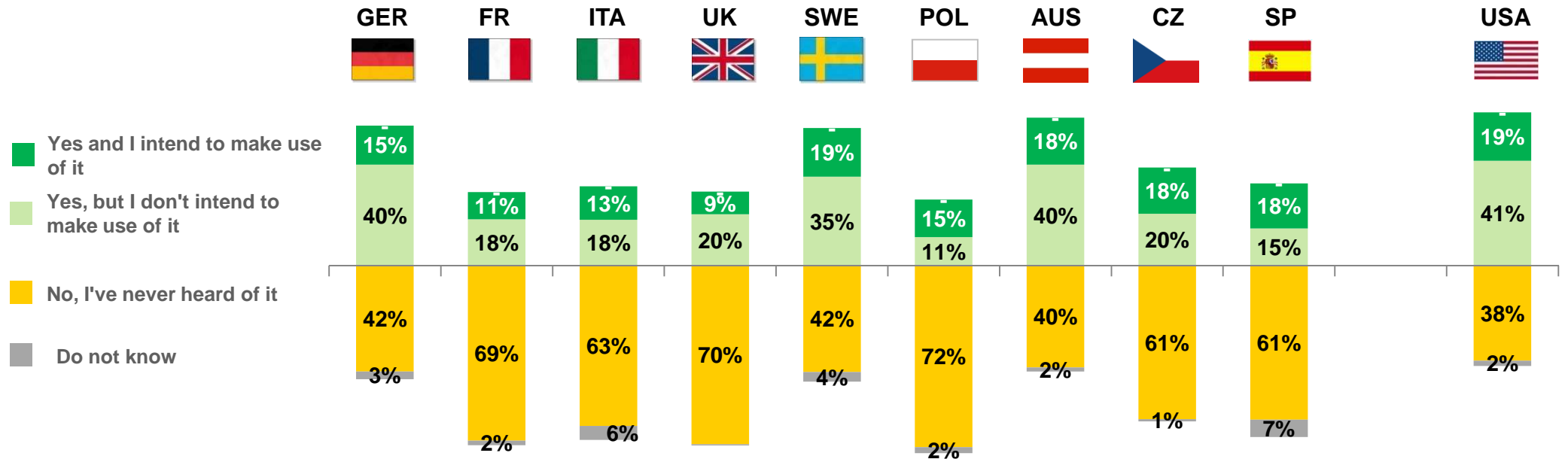


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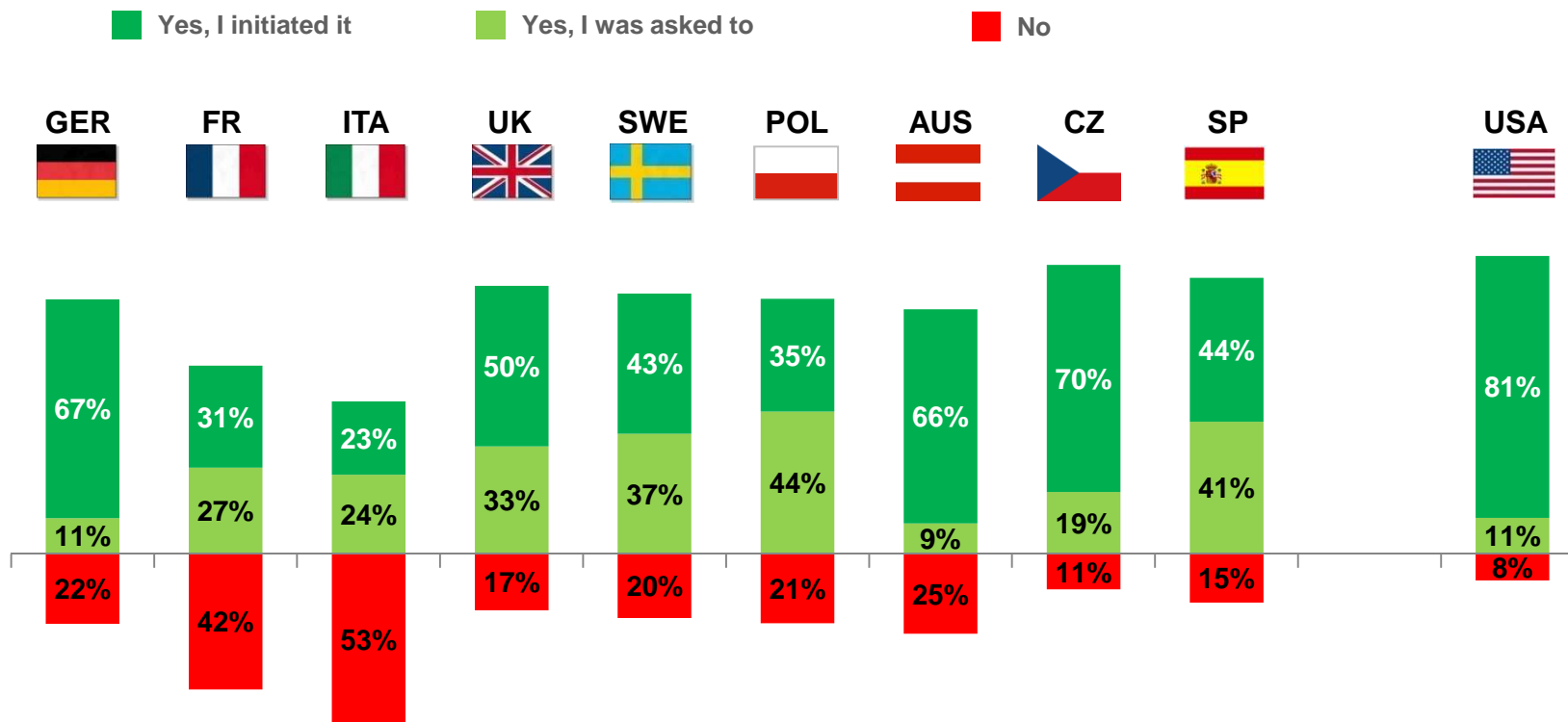


Individuals will soon be able to access their own genetic map which will make it possible to predict their genetic risk for serious illness.

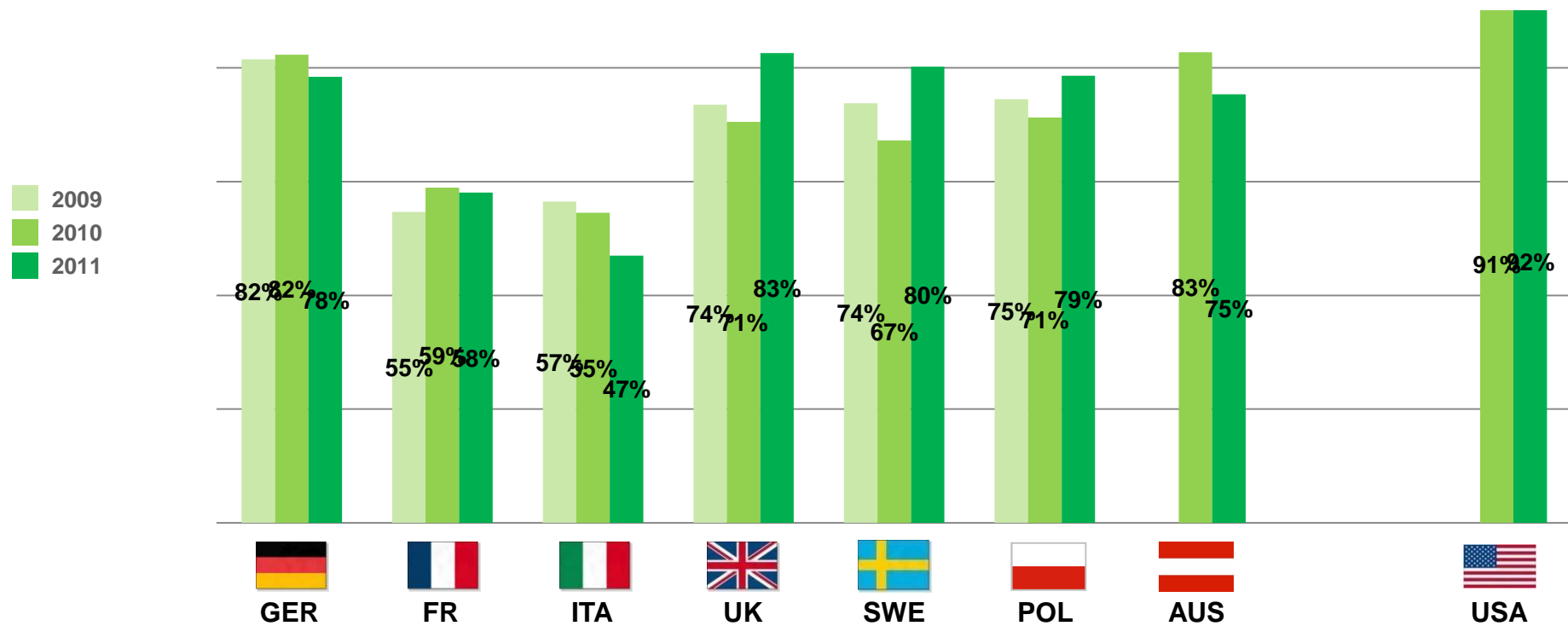
Have you ever heard of this and do you intend to make use of it?



In the last 5 years, have you been for a check-up ?

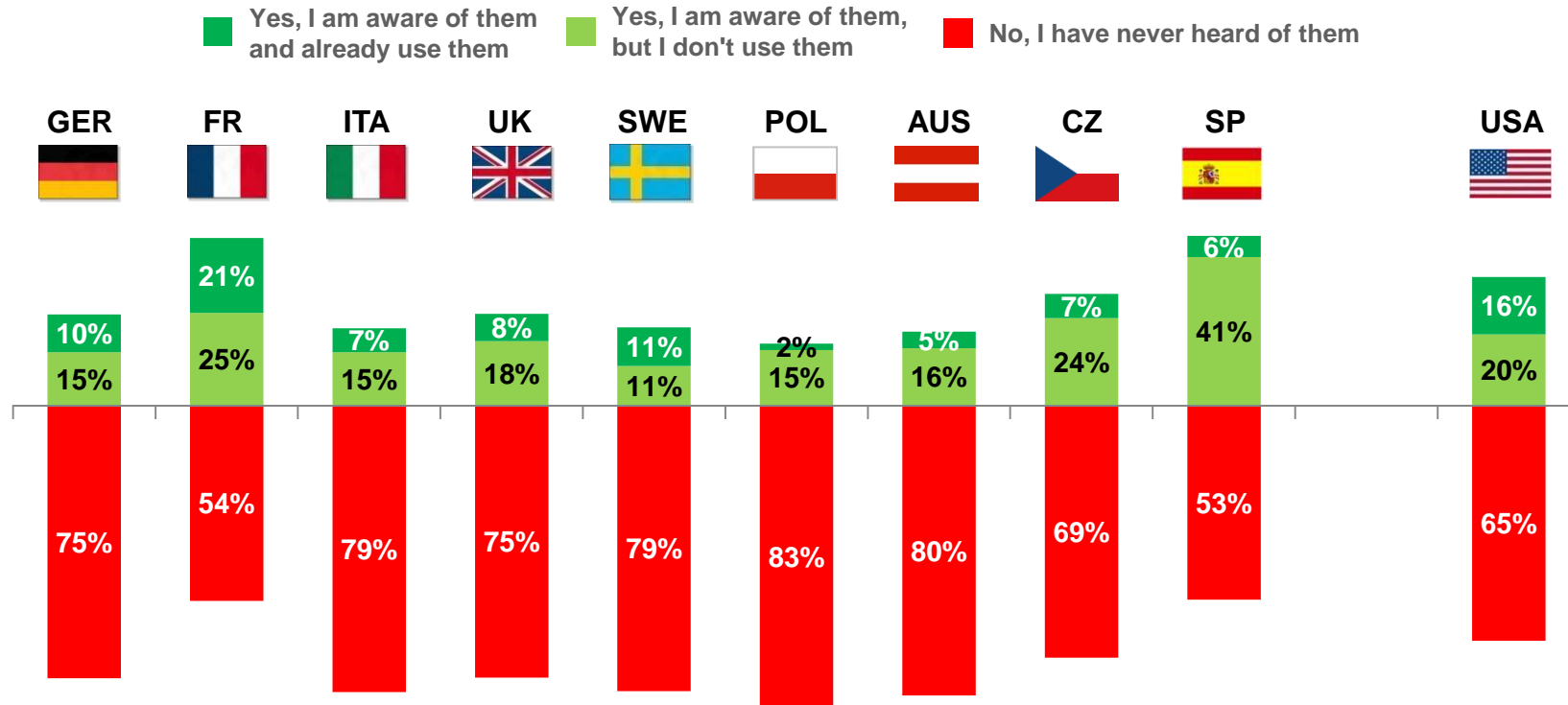


2009-2011 evolution in % of "has made a check-up in the last 5 years"



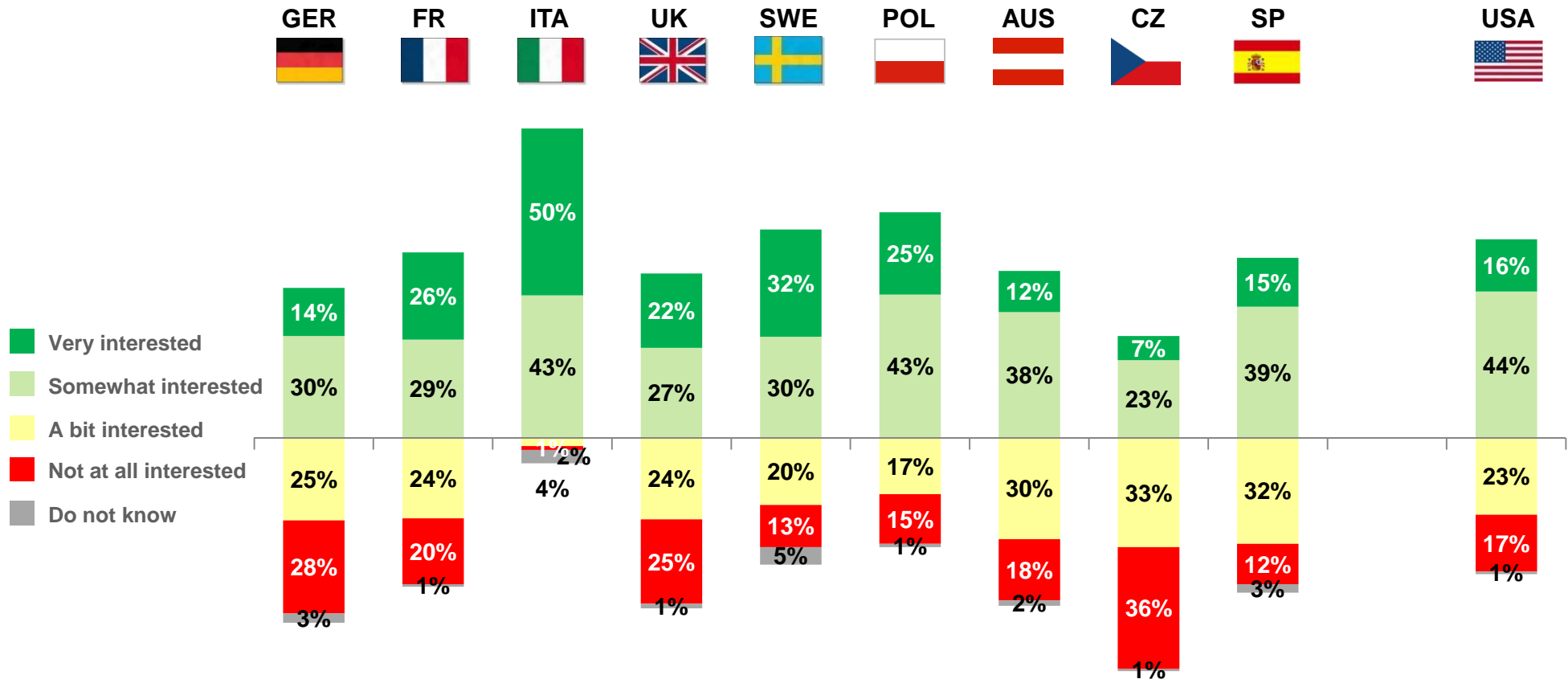
# Personalized tracking programs

*There are programs which monitor one's health throughout one's life and which include preventive consultations and personalized annual tracking. Have you ever heard of these monitoring programs ?*



# Interest for personalized tracking programs

Please rate your level of interest in these monitoring programs with preventive consultations and annual tracking?



Question for those currently employed: In the context of your job, do you feel that you need health programs for...?

	GER	FR	ITA	UK	SWE	POL	AUS	CZ	SP	USA
% very important										
Back pain	66%	73%	54%	61%	81%	77%	71%	50%	83%	37%
Stress management	56%	62%	46%	52%	72%	65%	59%	54%	81%	38%
Detecting serious illnesses	40%	49%	19%	35%	53%	63%	39%	60%	90%	35%
Obesity prevention	30%	47%	26%	36%	61%	40%	23%	26%	69%	33%
Preventing risks related to tobacco, alcohol or drug use	22%	41%	21%	32%	56%	33%	18%	15%	68%	26%

# Contribution of healthcare sector to Economy

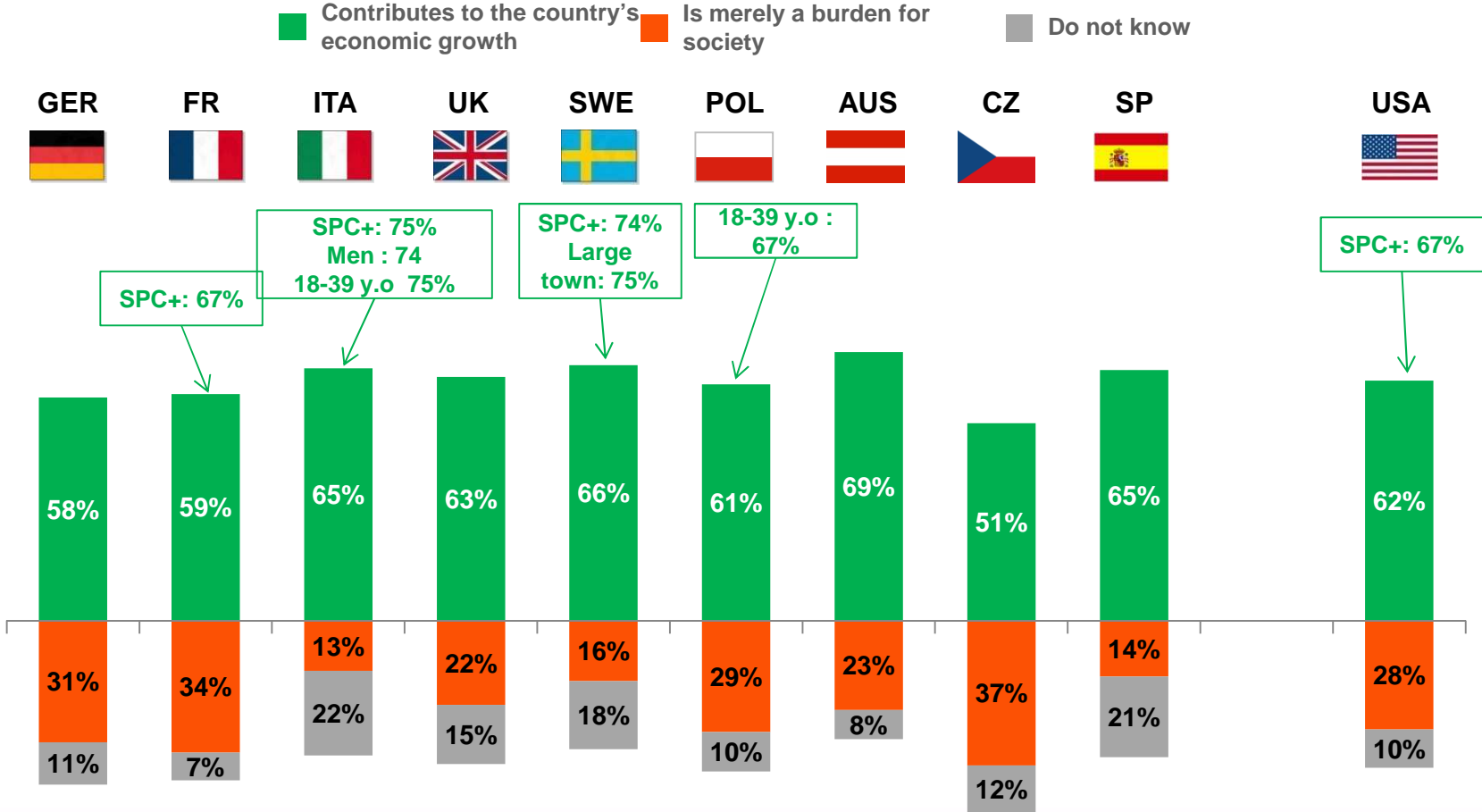


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# Contribution of health sector to Economy

In your opinion, the health sector, which includes activities related to medical equipment, treatments, consultations, drugs, and public and private care providers, is an industry that...



# Contribution of health sector to Economy - Evolution

2006-2011 evolution in % of « Contributes to the country's economic growth »

