



1st convention on Health Analysis and Management



Pan-european Health Barometer Cercle Santé – Europ Assistance

Chamonix, 25th of September 2009

Introduction



Germany



France



Italy



UK



Sweden



Poland
2009

Pan-european study conducted in six members states of the European Community , chosen because presenting differences in terms of :

- **Distribution between private and public sector, and procedure for access to medical care**
- **Decision-making centers:** *national or regional*
- **Logic having prevailed when implementing healthcare systems :** *Beveridge / financing by the general taxes or Bismarck / financing by employee's contributions*
- **Share of GDP going to health:** *from 6.2 % to 1.1 %*
- **EU membership date :** *1957 - 1973 – 1995 - 2004*

Methodology:

2400 Europeans aged 18 + , 400 interviews per country

Representativeness ensured by quotas set on age, gender, region and SEC class.

*CATI interviews : Wave 1 : October 2006, Wave 2 : October 2007 **Wave 3 : June – July 2009***

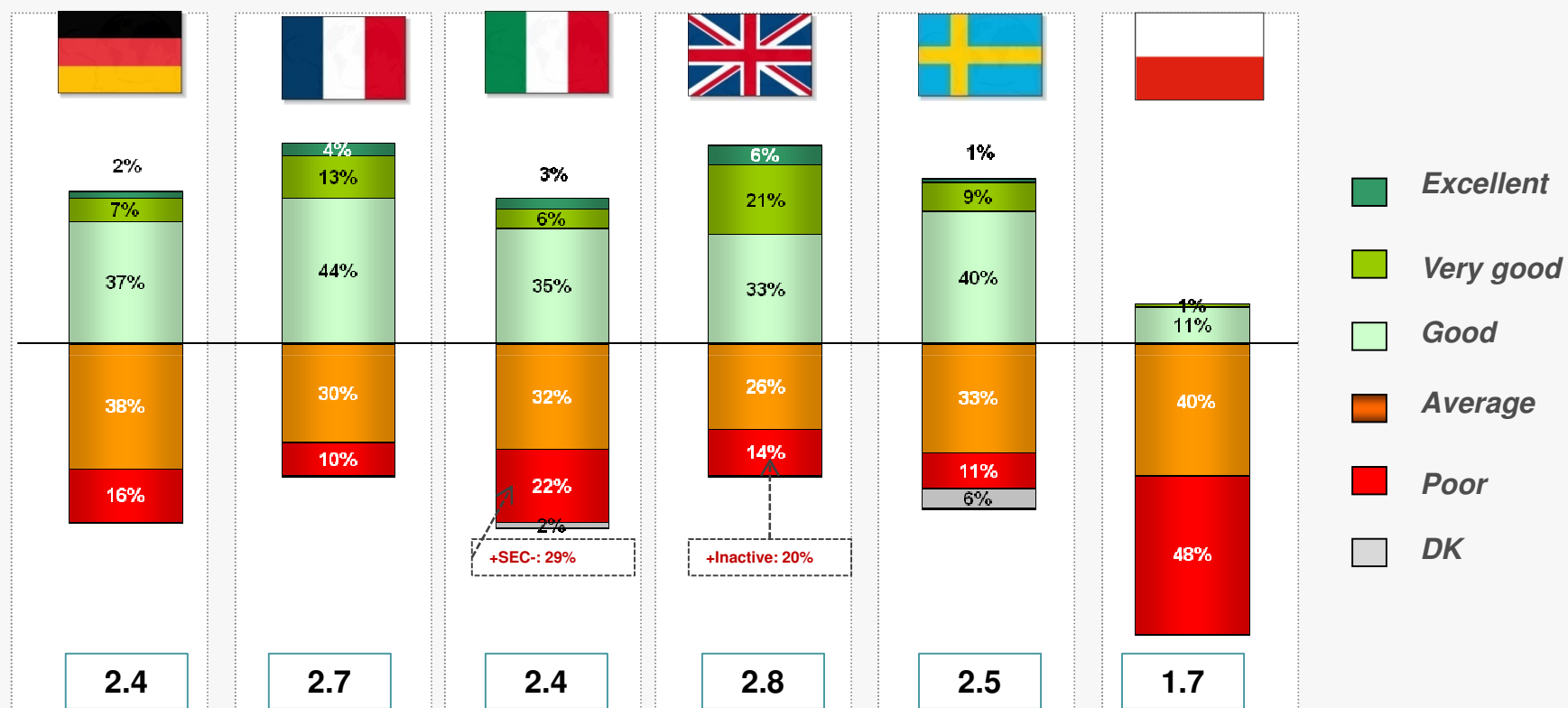
Seven topics were covered in the study:

1. Assessment of the healthcare system and threats for the future
2. Healthcare and patients mobility for access to treatment
3. Healthcare and social requirements
4. Healthcare and new technologies
5. Prevention
6. Ageing and dependent people
7. CHAM 2009 focus : from craft to industry ?

1 – Assessment of the healthcare system and threats for the future

2009 : assessment of the healthcare system

Does the current organisation of your country health system seem to you to be...:



Scoring : Excellent = 5 / Very good = 4 / Good = 3 / Average = 2 / Poor = 1.

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The organisation of the healthcare system

Changes in the % of interviewees who responded "Excellent" or "Very good"

Does the current organisation of your country health system seem to you to be...:

«Excellent» answers in 2006

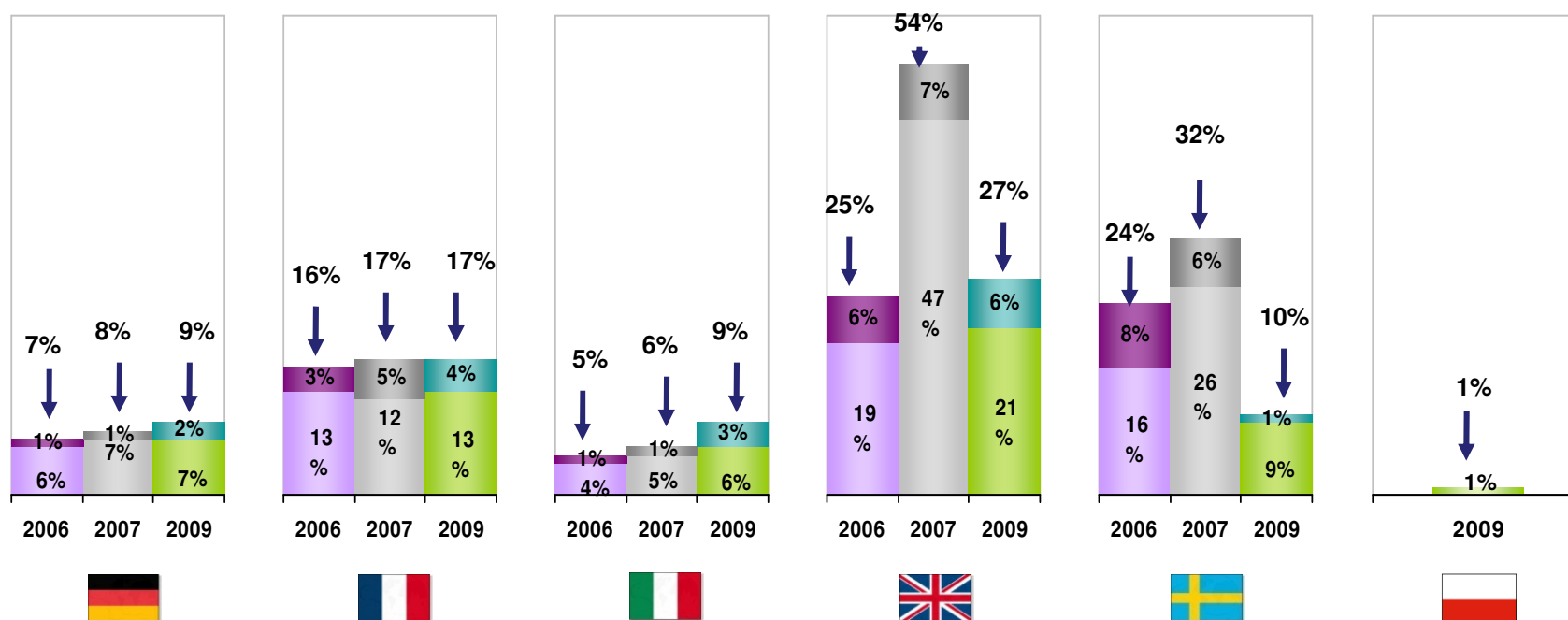
«Excellent» answers in 2007

«Excellent» answers in 2009

« Very good » answers in 2006

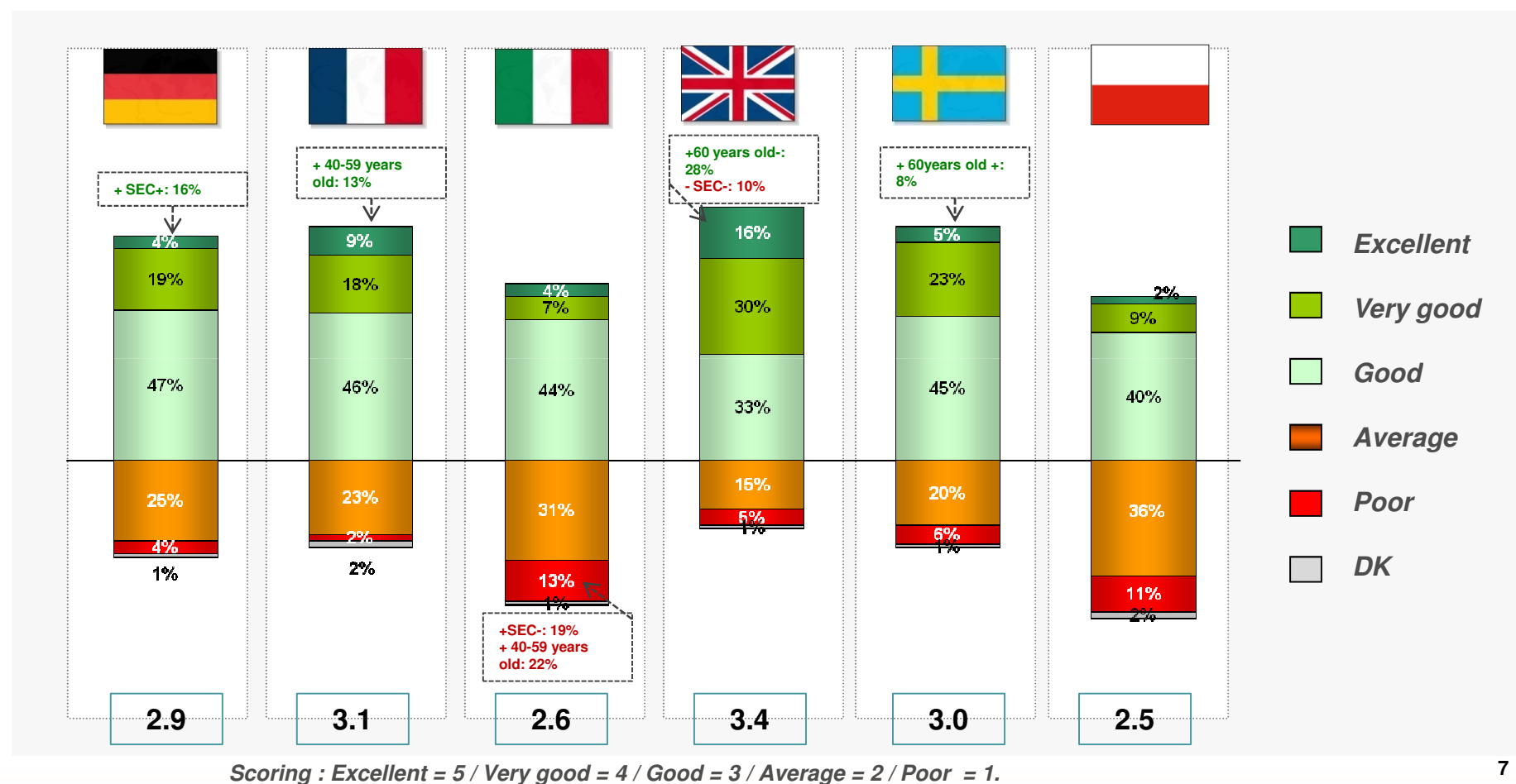
« Very good » answers in 2007

« Very good » answers in 2009



2009 : assessment of the standard of health care provided during a consultation

Is the standard of health care provided during a doctor's consultation...:









2006-2007-2009 : changes

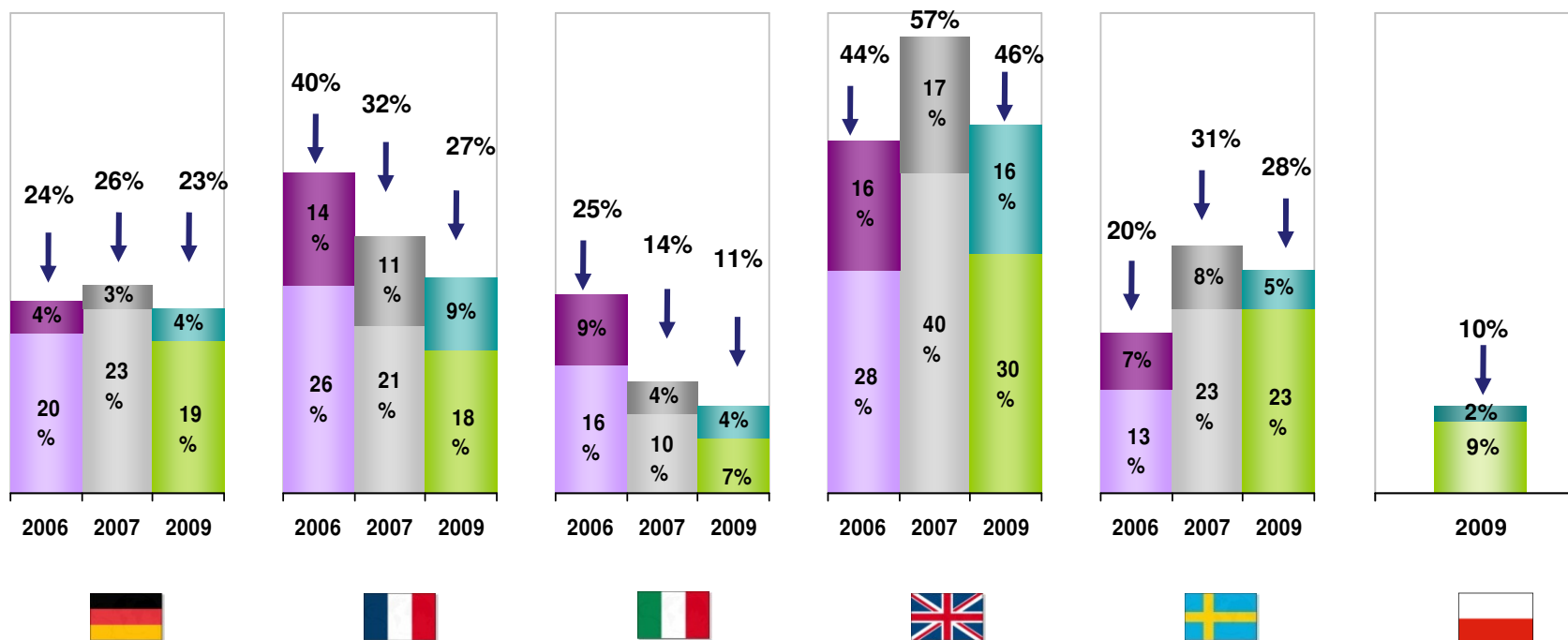
Standard of health care provided during a consultation

Changes in the % of interviewees who responded "Excellent" or "Very good"

And is the standard of health care provided during a doctor's consultation...:

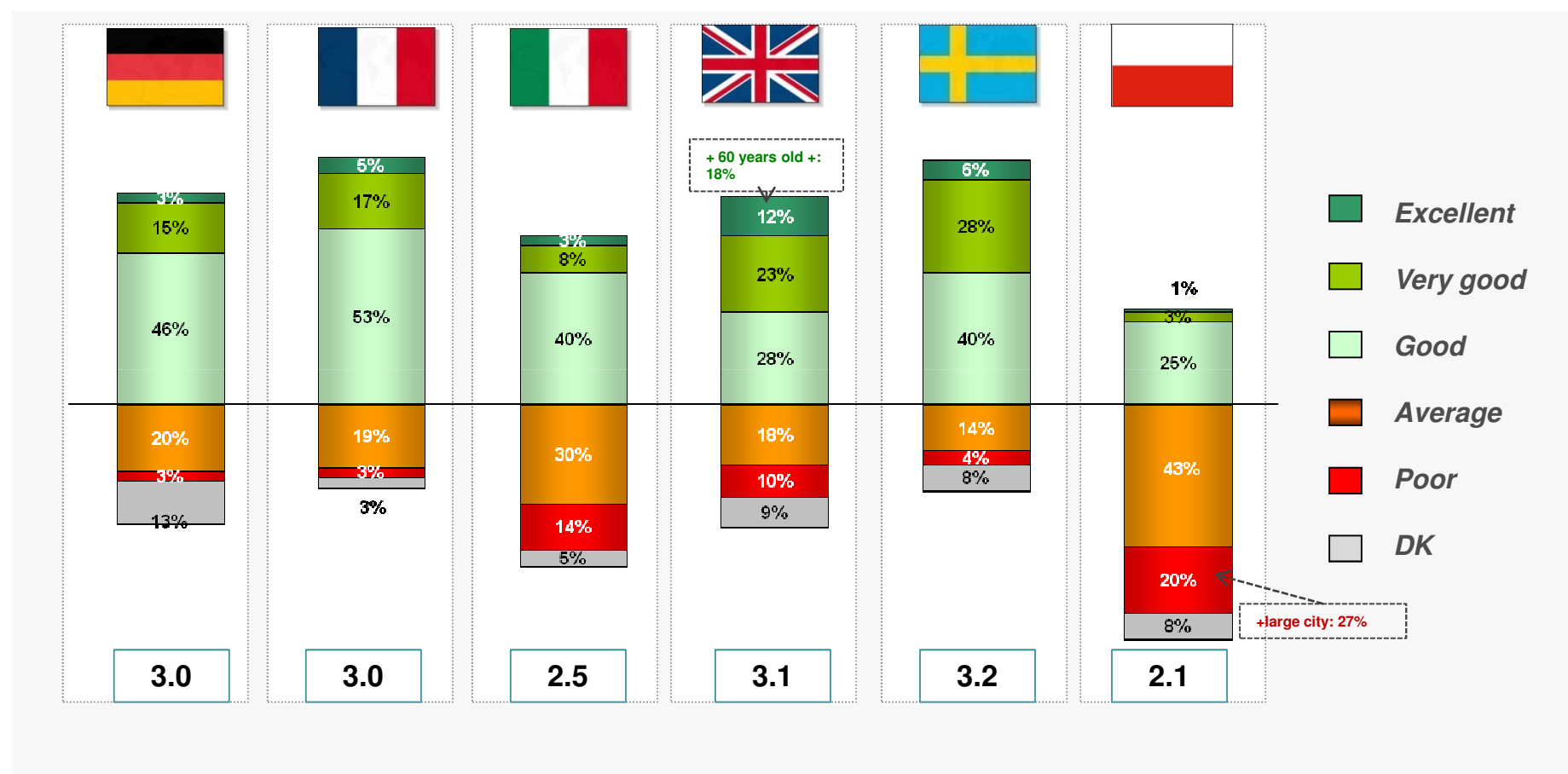
 «Excellent» answers in 2006
 «Excellent» answers in 2007
 «Excellent» answers in 2009

 « Very good » answers in 2006
 « Very good » answers in 2007
 « Very good » answers in 2009



2009 : assessment of the standard of health care provided during a hospital stay

And, in your opinion, is the standard of health care provided during a hospital stay....:



Scoring : Excellent = 5 / Very good = 4 / Good = 3 / Average = 2 / Poor = 1.

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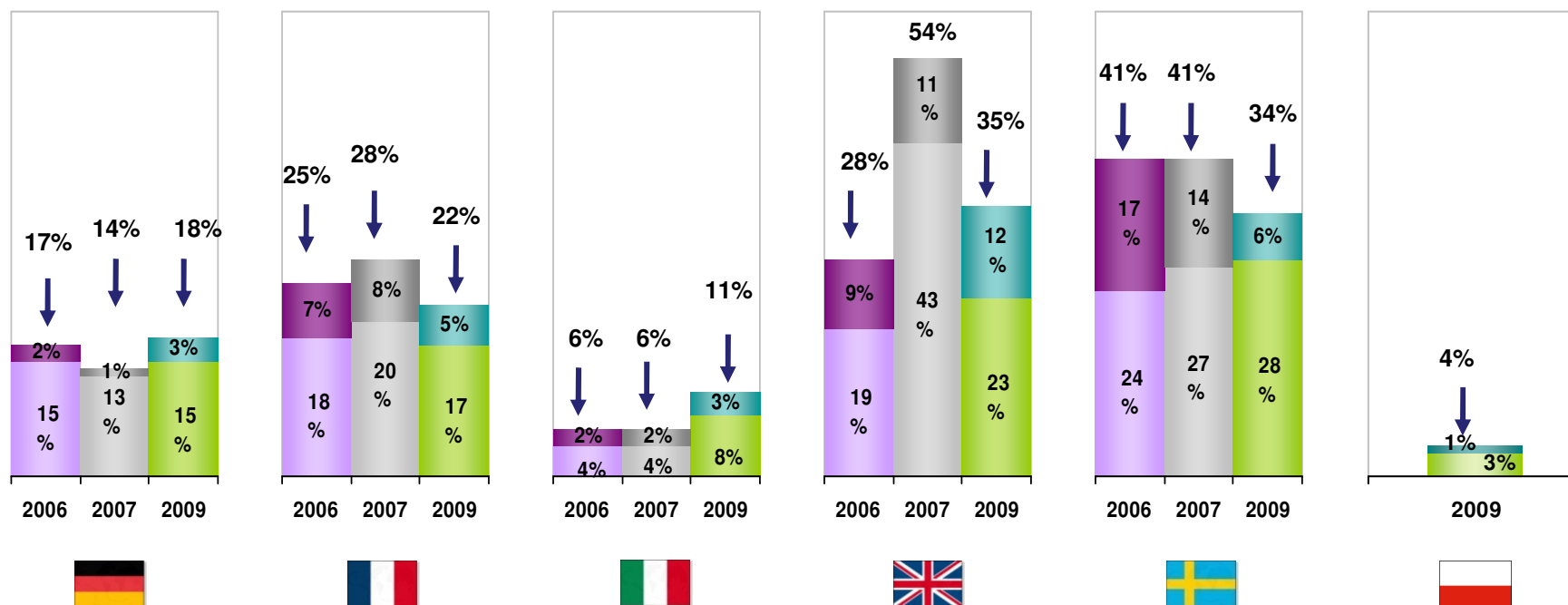
2006-2007-2009 : changes

Standard of health care provided during a hospital stay Changes in the % of interviewees who responded "Excellent" or "Very good"

And, in your opinion, is the standard of health care provided during a hospital stay...:

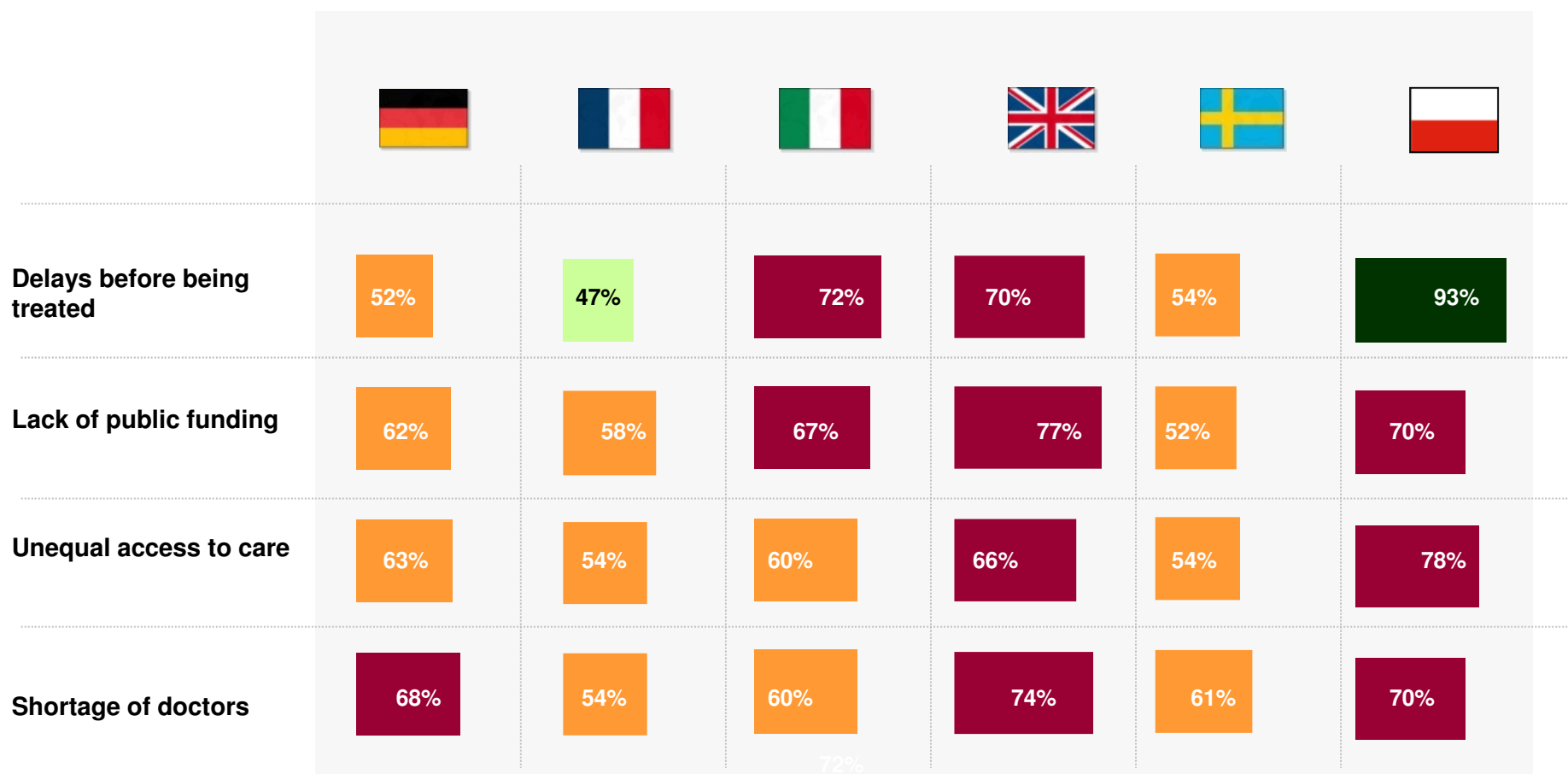
■ «Excellent» answers in 2006
■ «Excellent» answers in 2007
■ «Excellent» answers in 2009

■ « Very good » answers in 2006
■ « Very good » answers in 2007
■ « Very good » answers in 2009



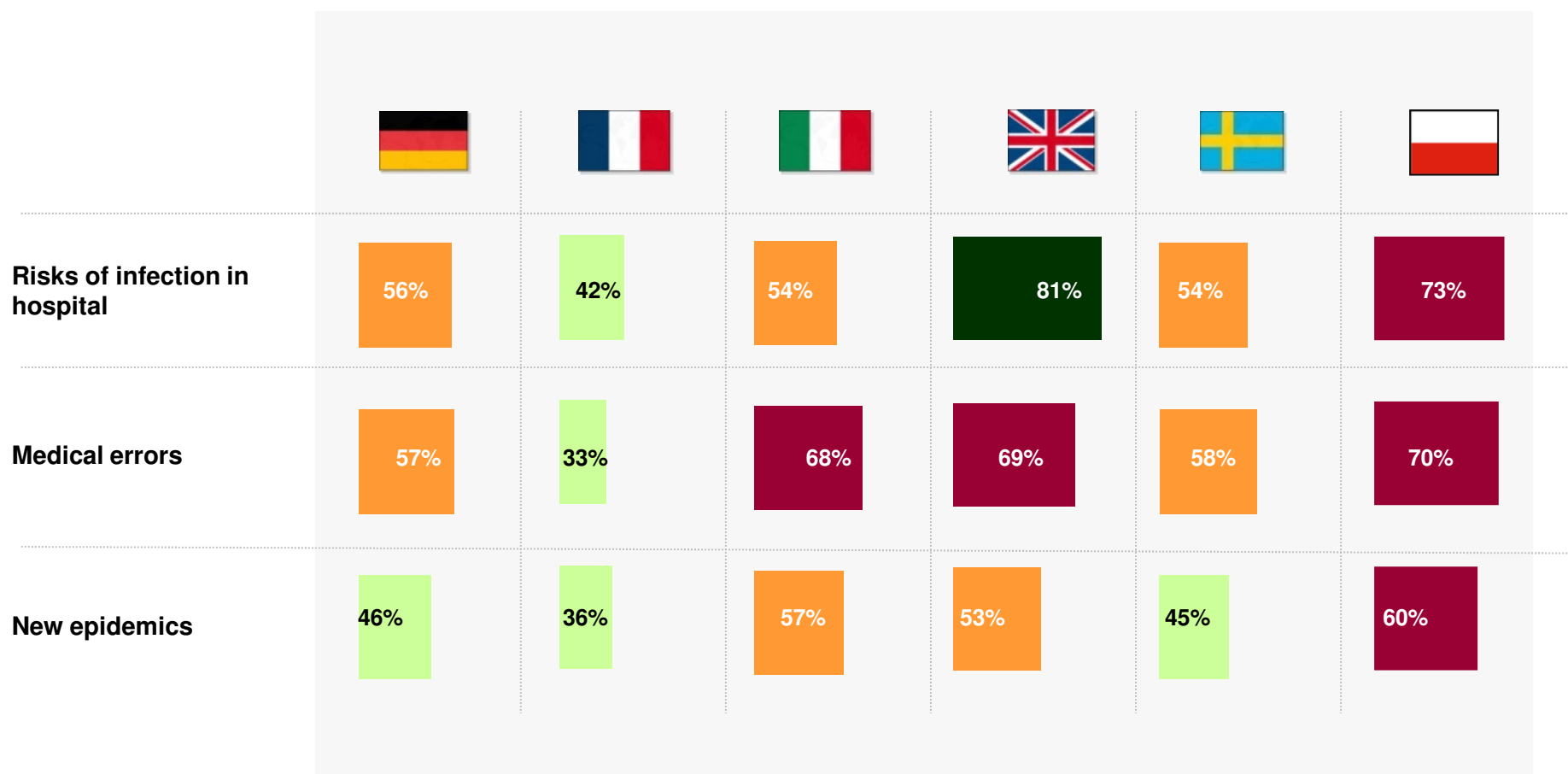
2009 : threats

*In the coming years our health system will be faced with various threats:
Total : % very important*



2009 : threats

*In the coming years our health system will be faced with various threats:
Total : % very important*

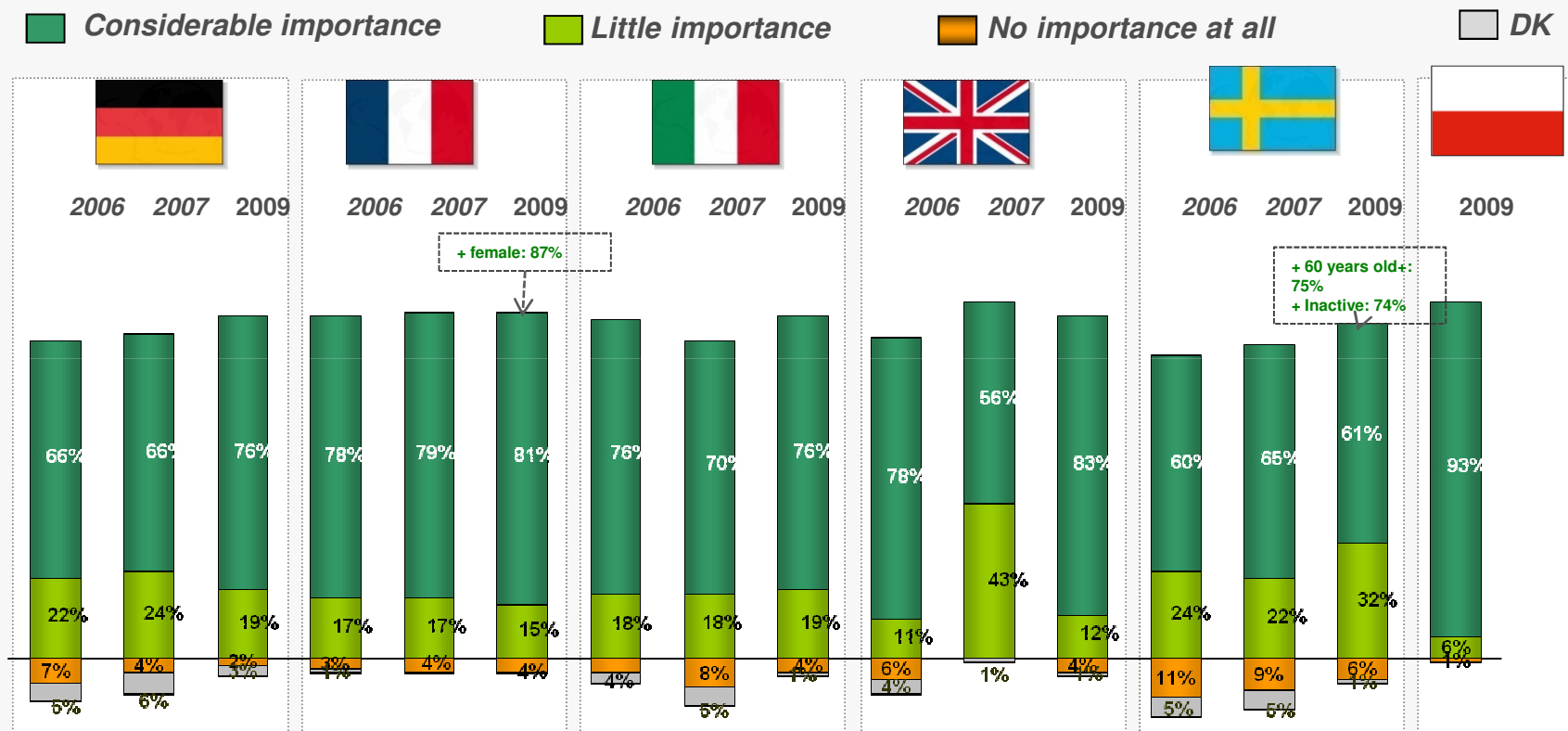


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2 - Mobility

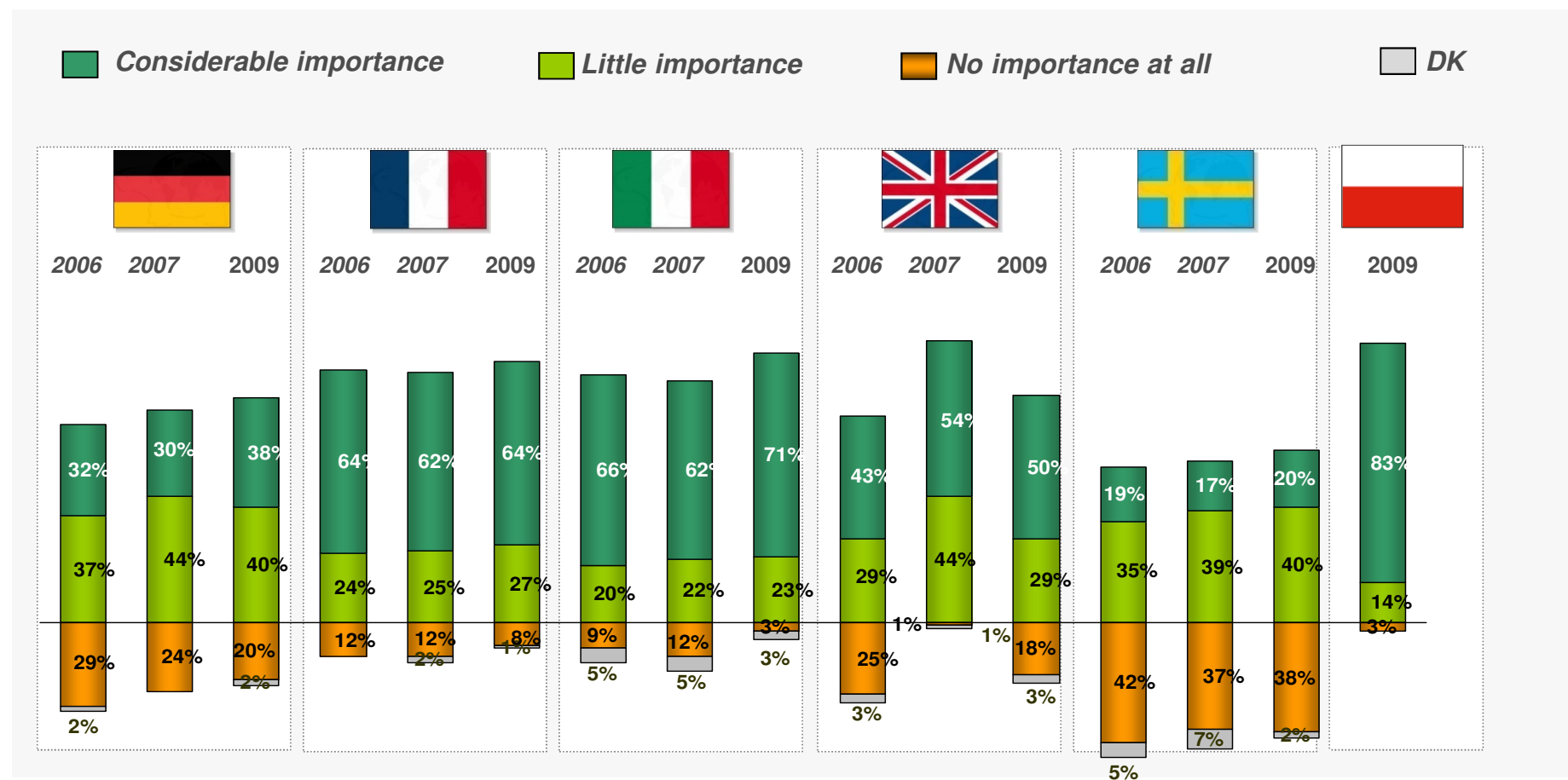
2006-2007-2009 : changes

Now, let us imagine that you go to live in another location or in another country, what importance do you place on the range of available medical services and easy access to them from your new residence ?



2006-2007-2009 : changes

Imagine you are choosing a holiday destination outside of your country. How much importance would you attach to the local health care conditions in deciding where to go?

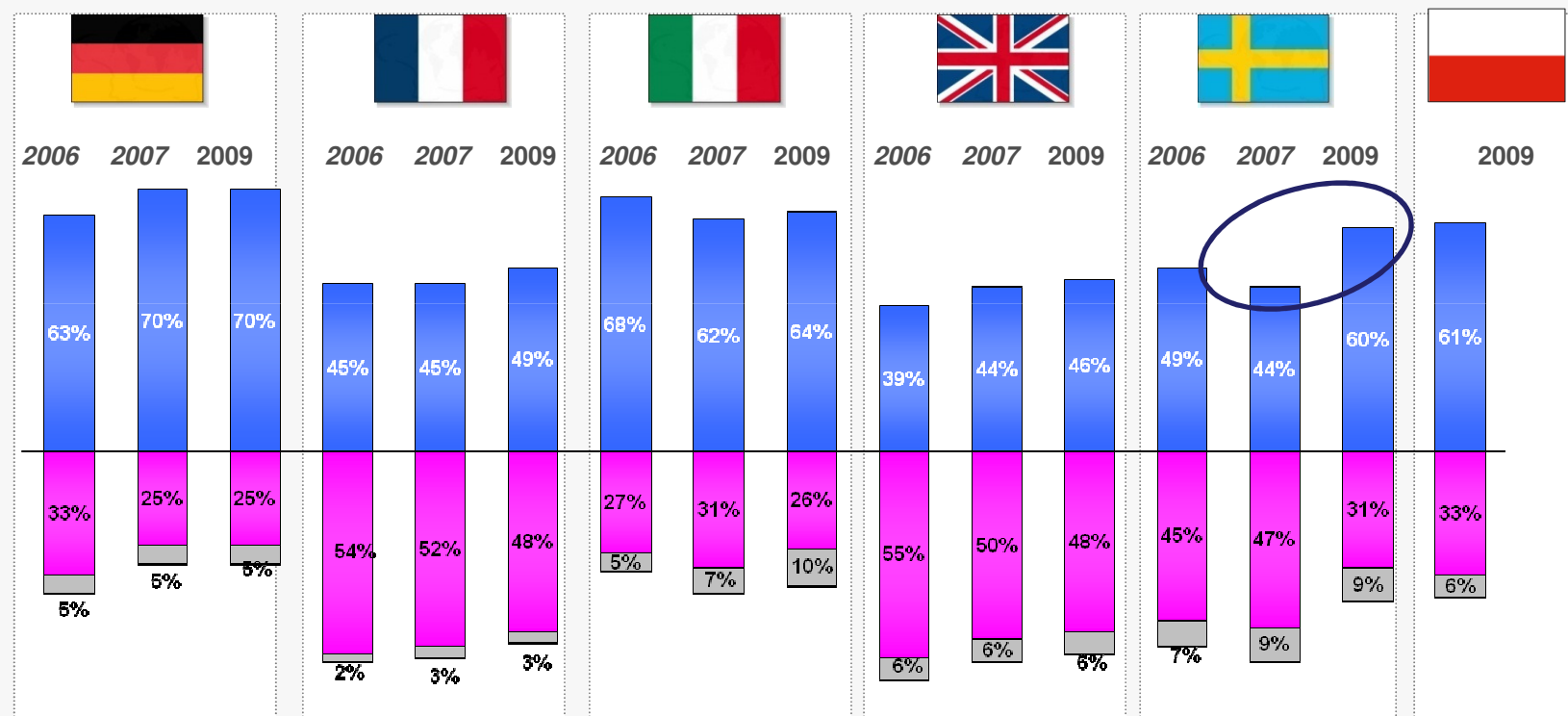


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2006-2007-2009 : changes

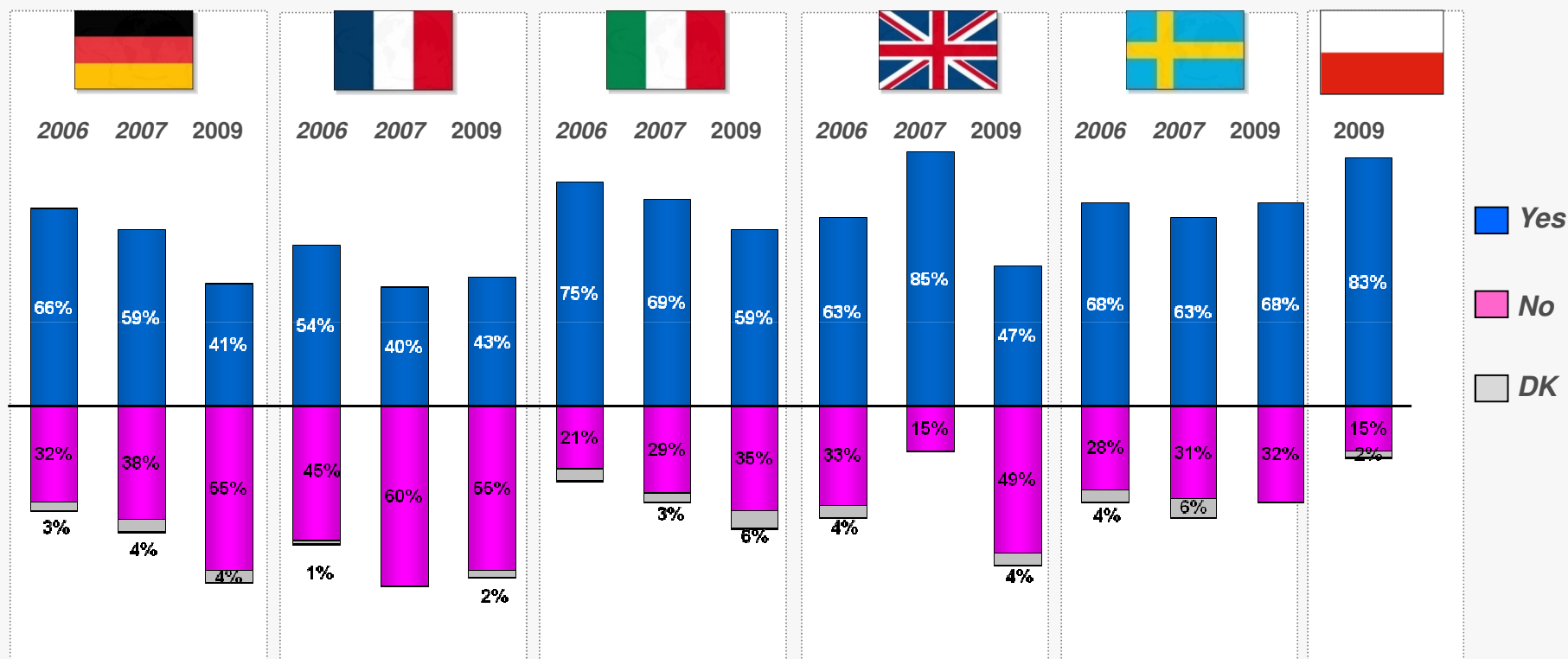
If you need an operation, would you prefer to go...

■ ...to a specialist surgeon practising in a clinic or a hospital at a distant location
■ ...to a general surgeon practising in a clinic or a hospital near your home
■ DK



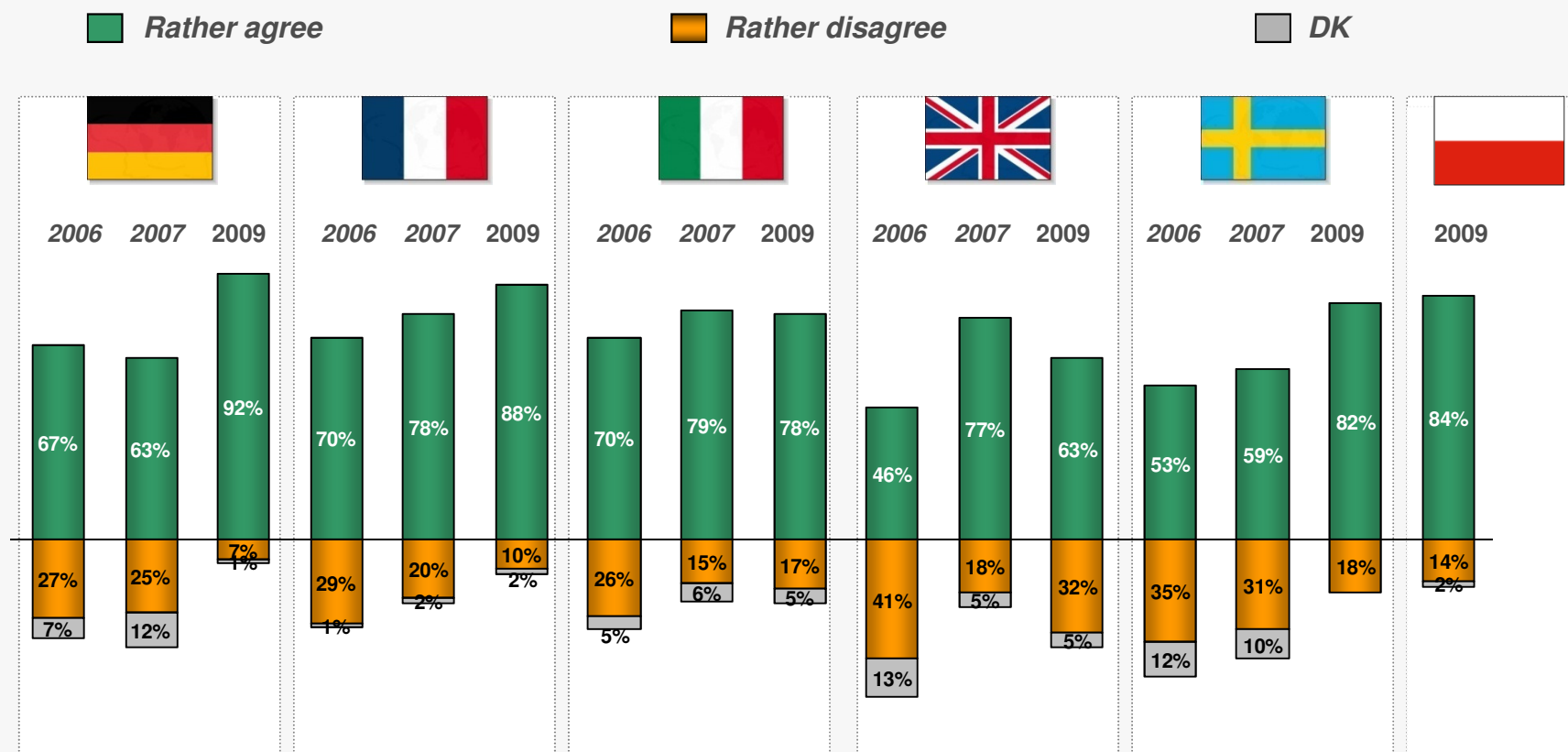
2009 : mobility abroad

Would you accept going abroad to be treated with more advanced medical techniques not available in your country?



2006-2007-2009 : changes

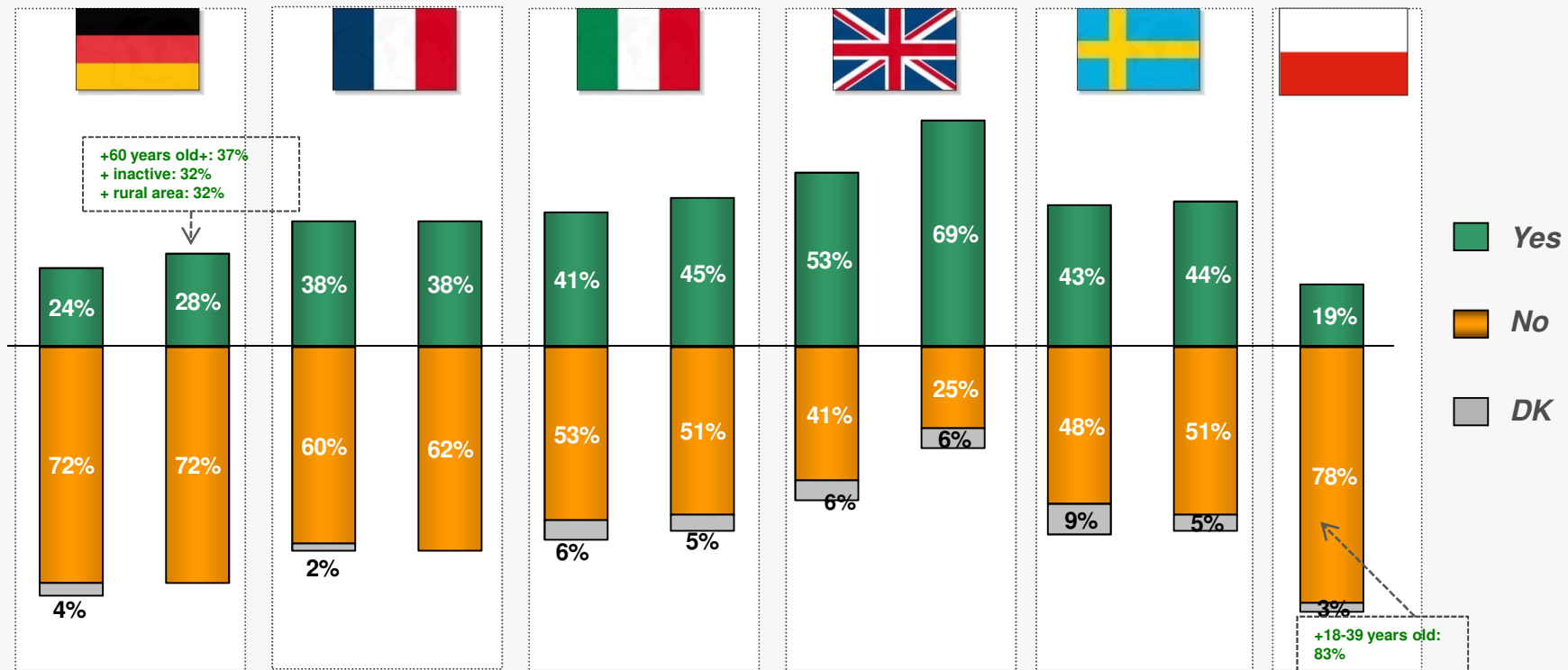
*There are also people who come to be treated in your country.
If national hospitals accepted patients from another country who would pay to receive healthcare,
would you :*



3 – Social requirements and financing priorities

2007-2009 : changes

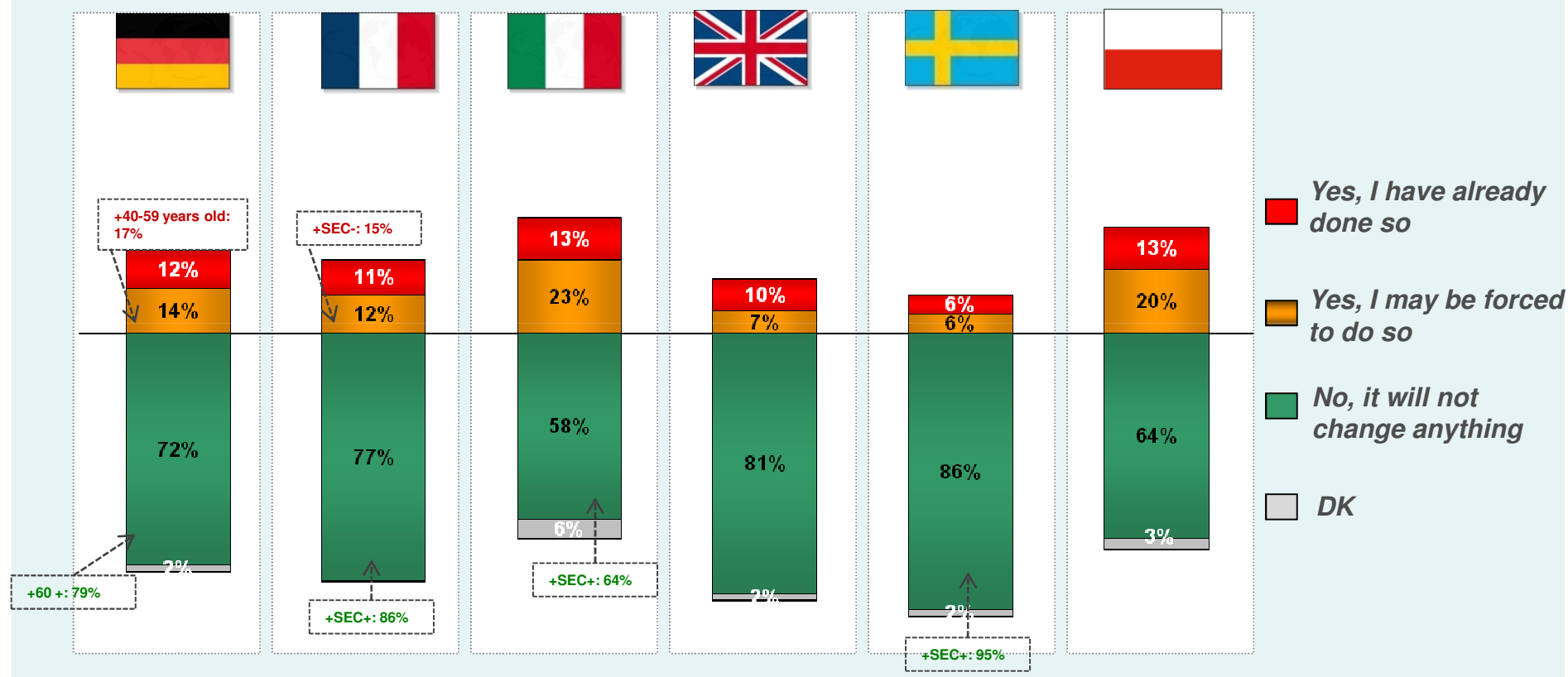
Would you say that the present health system enables equal access to treatment to all (nationals) citizens?



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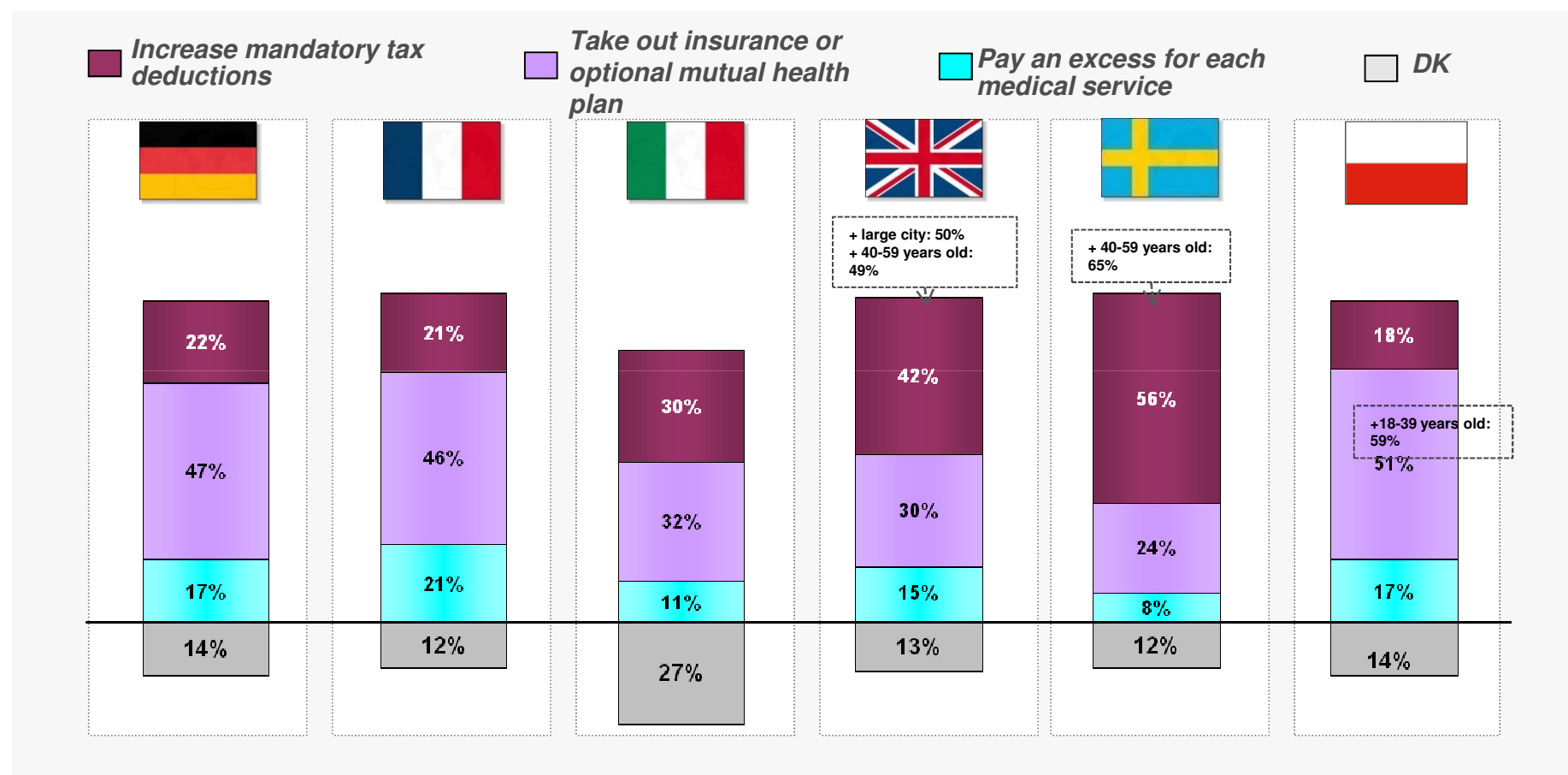
2009 news : impact of the economic situation in health care

As a result of the current economic situation, have you been, or will you be, forced to forego or delay health care such as medical consultations, examinations, surgery, dental care or medicine purchases ?



2009 : financing of greater quality of care

The continuing improvement in the quality of care entails additional spending. In your opinion, what is the best way to fund this spending?

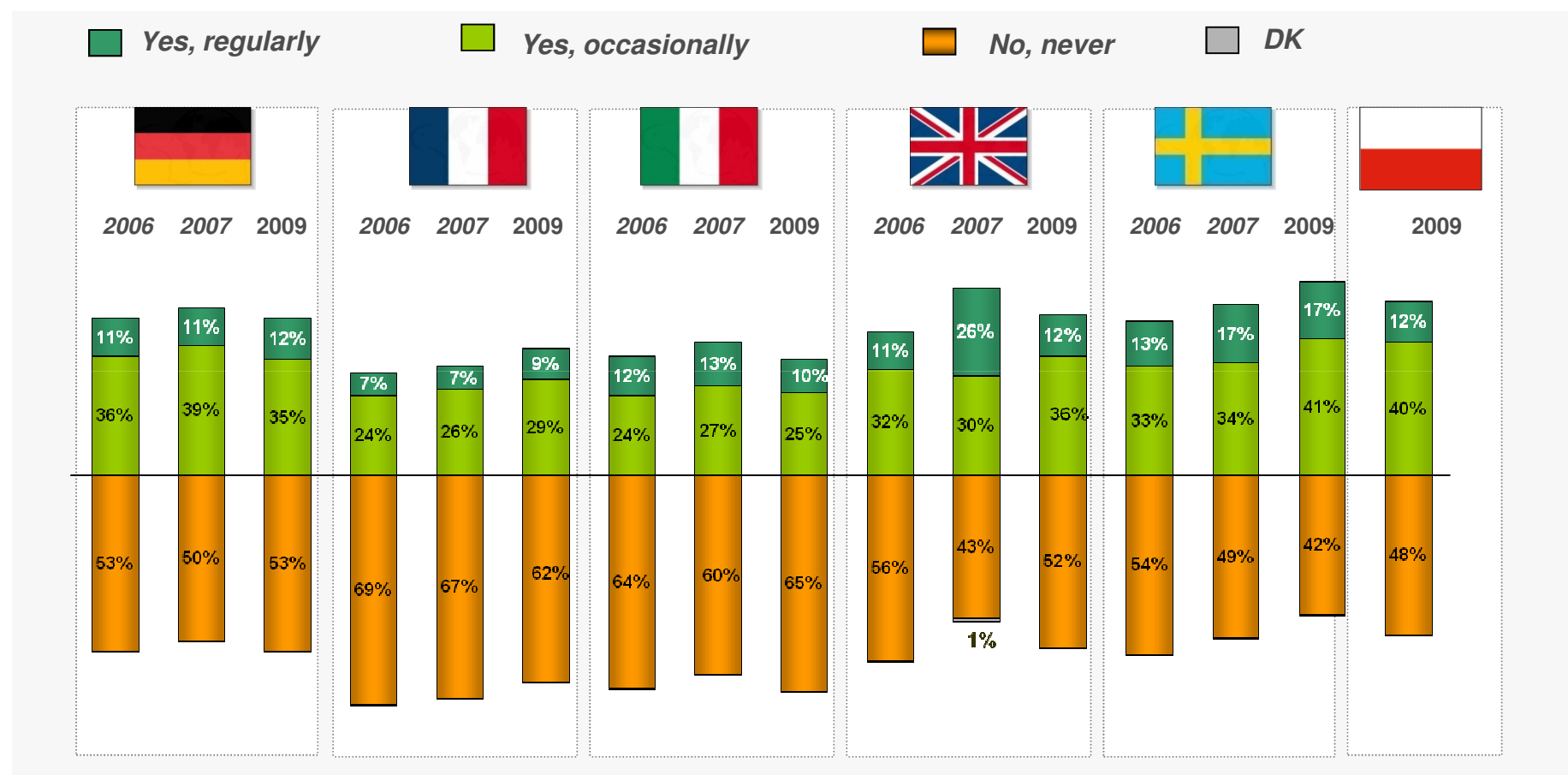


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4 – Healthcare and new technologies

2006-2007-2009 : changes

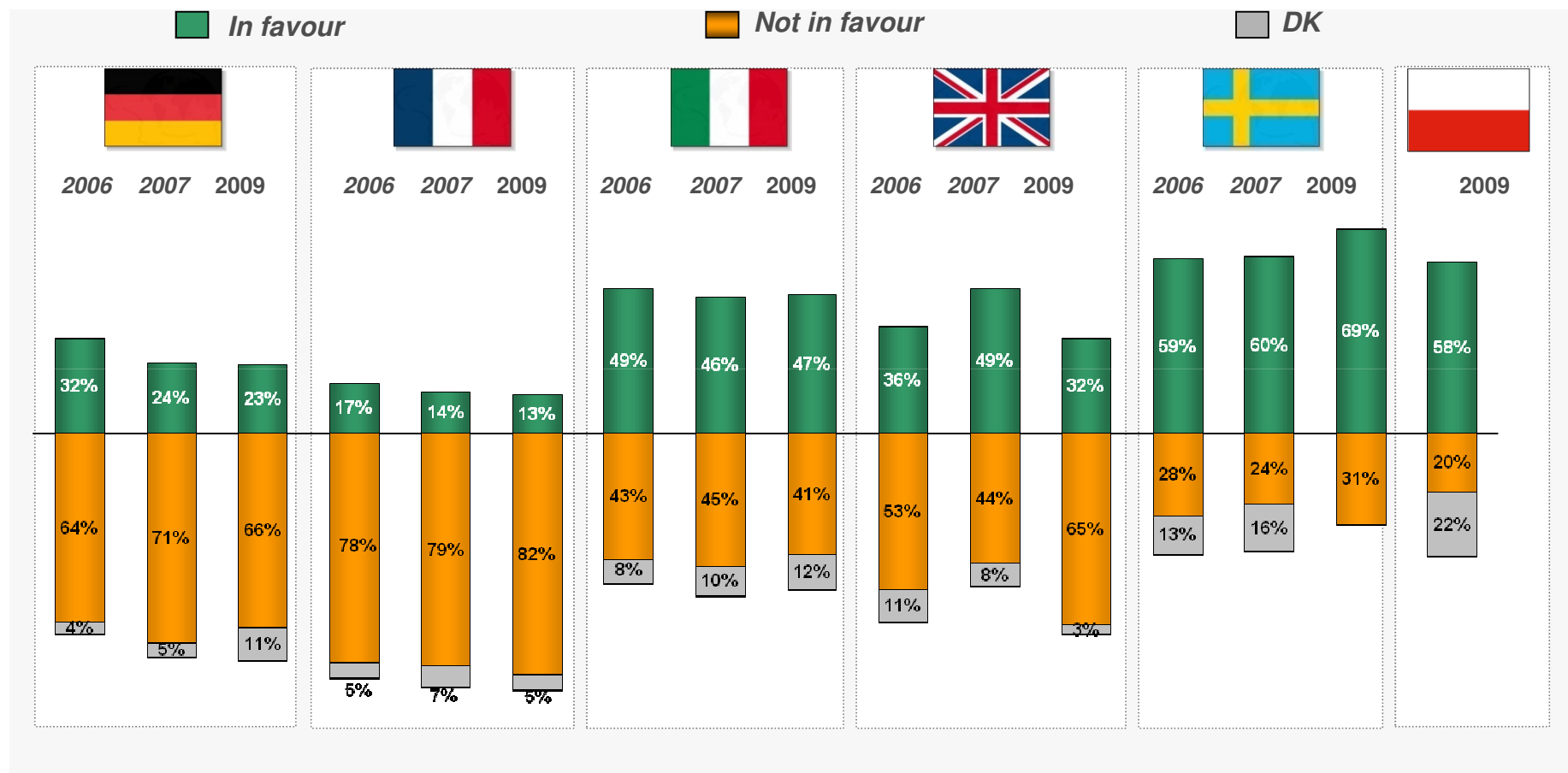
Do you use the Internet for information relating to health care?



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2006-2007-2009 : changes

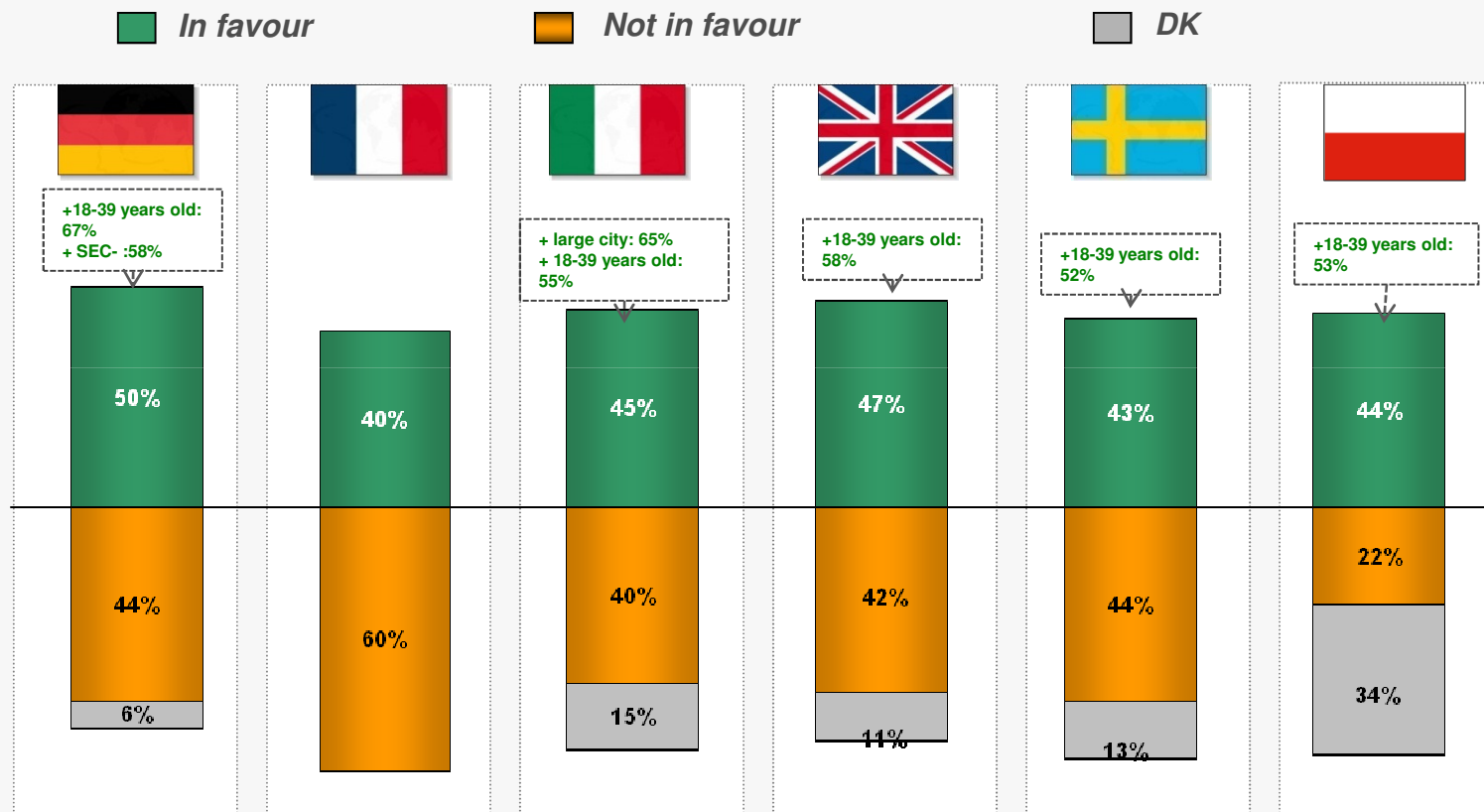
Are you in favour or not in favour of the development of on-line medical consultations?



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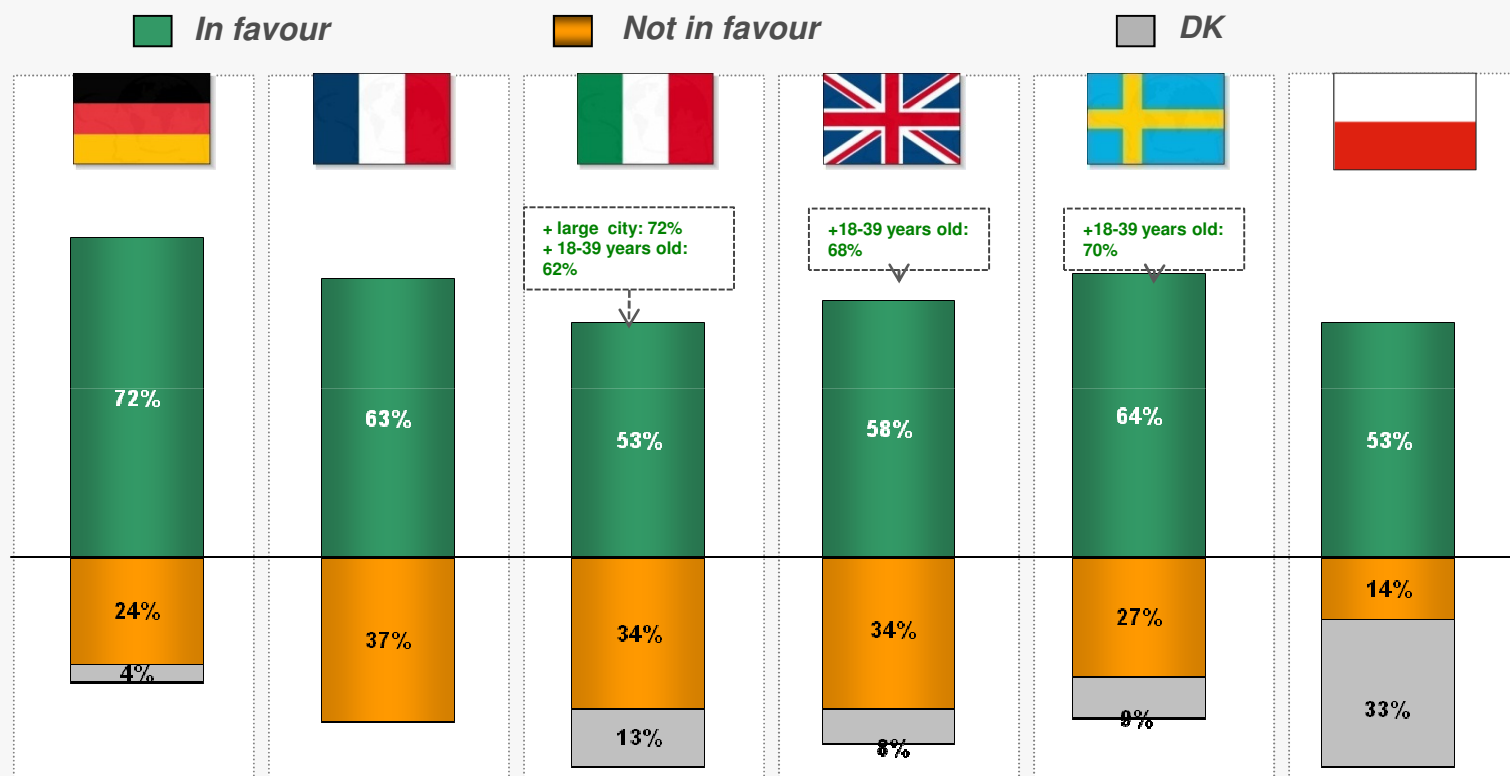
2009 : on-line physician's rating

Are you in favour or not in favour of websites where doctors can be assessed?



2009 : on-line hospitals rating

Are you in favour or not in favour of websites where hospitals can be assessed ?

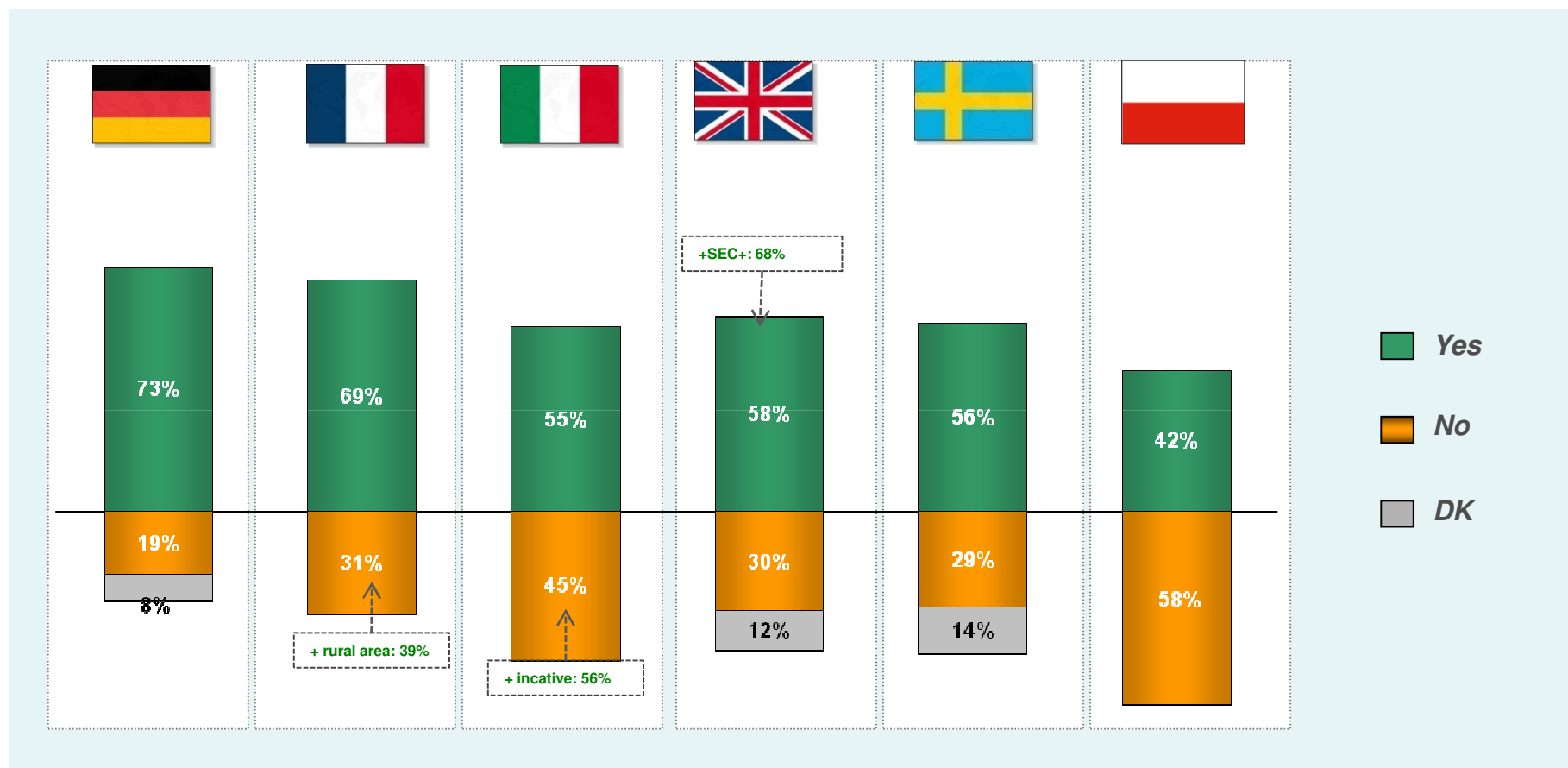


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5 - Prevention

2009 : pandemic risk of H1N1 influenza

Do you think that, in your country today, we are well equipped to deal with a Swine Flu pandemic?



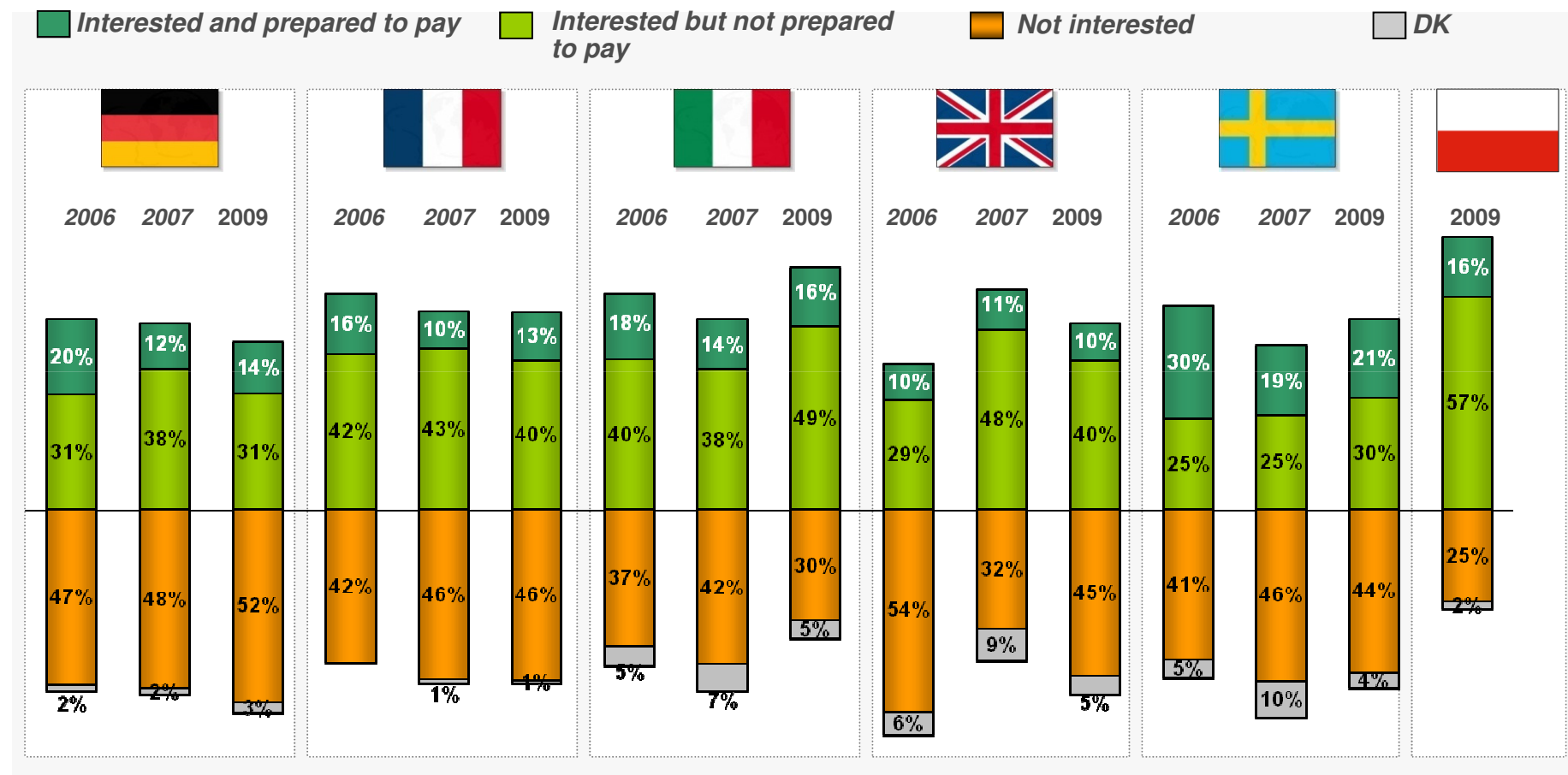
2009 : prevention

% of interviewees who ...						
..have been tested for cancer, HIV (or any other serious disease) in the last 5 years	69%	42%	43%	40%	40%	41%
..have been for a check up in the last 5 years	82%	55%	57%	74%	74%	75%
..have been to the dentist for a check-up in the last year	88%	64%	67%	73%	76%	64%
..are interested in a life-long health surveillance programme	45%	53%	65%	50%	51%	73%

2006-2007-2009 : changes

It is actually possible to subscribe to a life-long health monitoring programme that includes a prevention service and individual monitoring.







How interested are you in this programme ? Are you....



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2009 : financing of the health monitoring programme







Who would you expect to finance this programme?

						
The State	51%	65%	81%	73%	68%	84%
Social security/ NHS		15%		2%		
Insurances/ mutual insurances	23%	1%				
Your employer	7%	9%	13%	14%	23%	
General public	2%	4%		1%	1%	
Mixed answers	7%	4%		4%	2%	1%
Other	-	-	6%	2%	2%	1%
Do not know	8%	3%		4%	4%	2%

2009 : health programmes at workplace

In the context of your job, do you think that you need health programmes for...

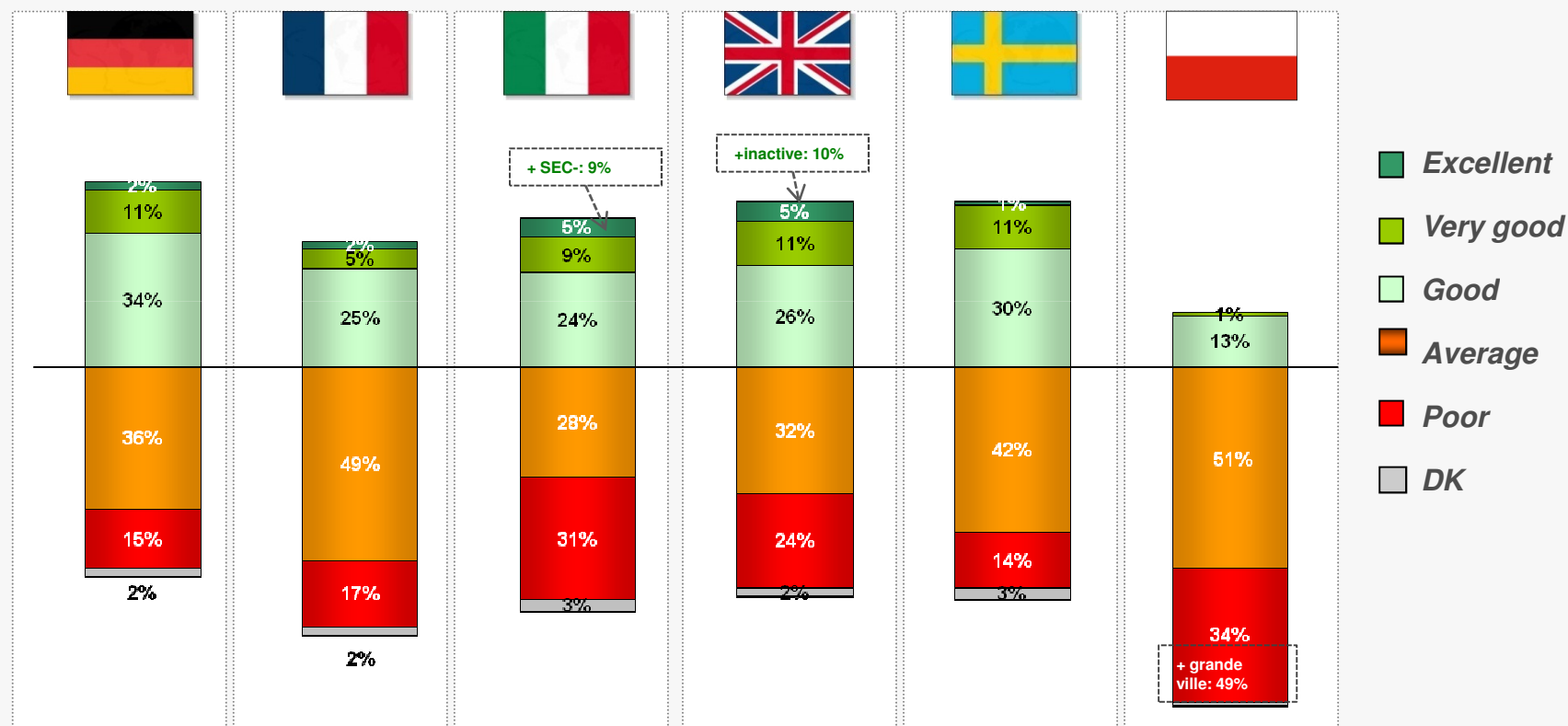
*Base : employed respondents
% of interviewees who said YES*

						
	218	246	252	228	267	238
Back pain	70%	78%	56%	50%	73%	73%
Stress	53%	67%	46%	45%	60%	59%
Serious conditions	52%	44%	29%	36%	51%	61%
Obesity	30%	49%	37%	36%	58%	47%
Tobacco/ alcohol/ drug use	28%	46%	29%	29%	54%	37%

6 – Ageing and management of dependent people

2009 : quality of management

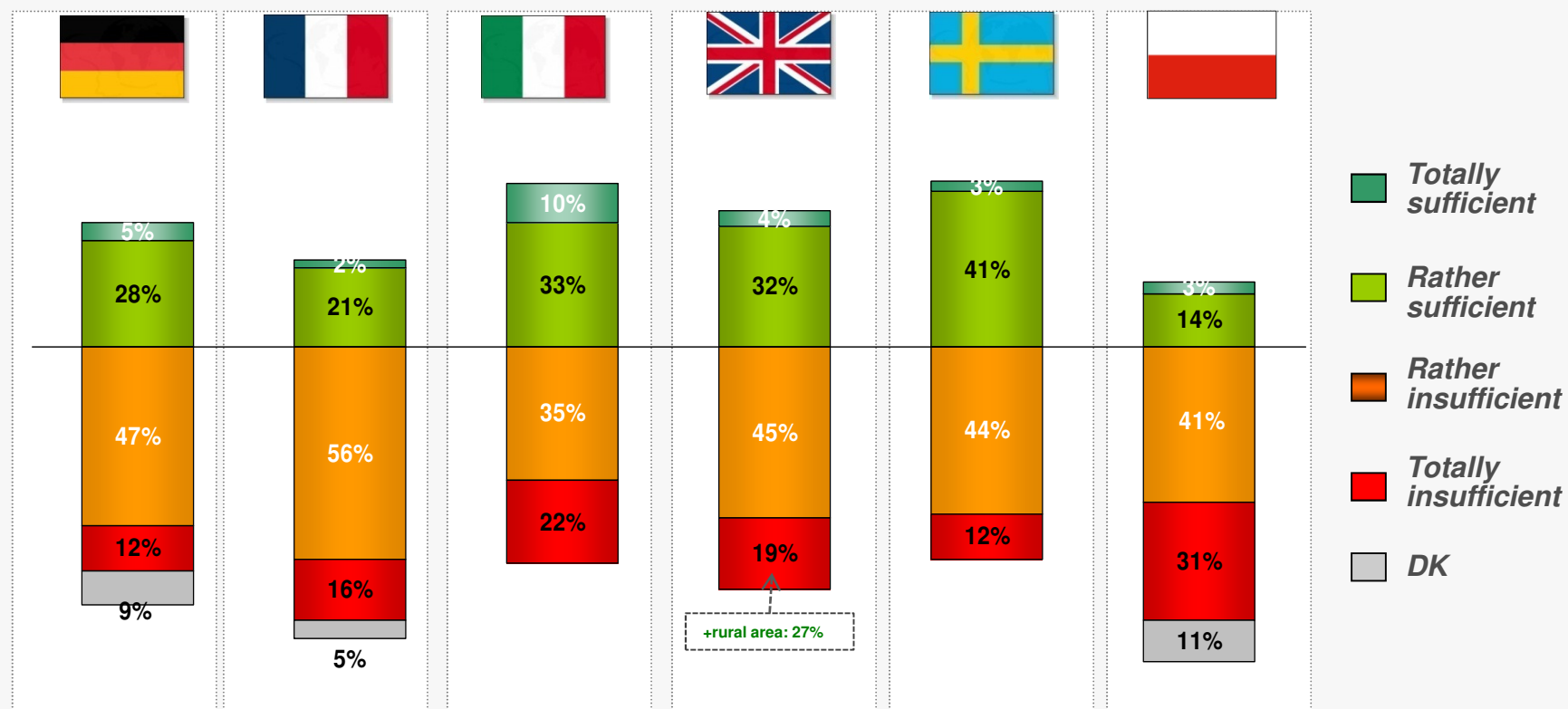
According to you, in your country today, is the care for elderly and dependent people :



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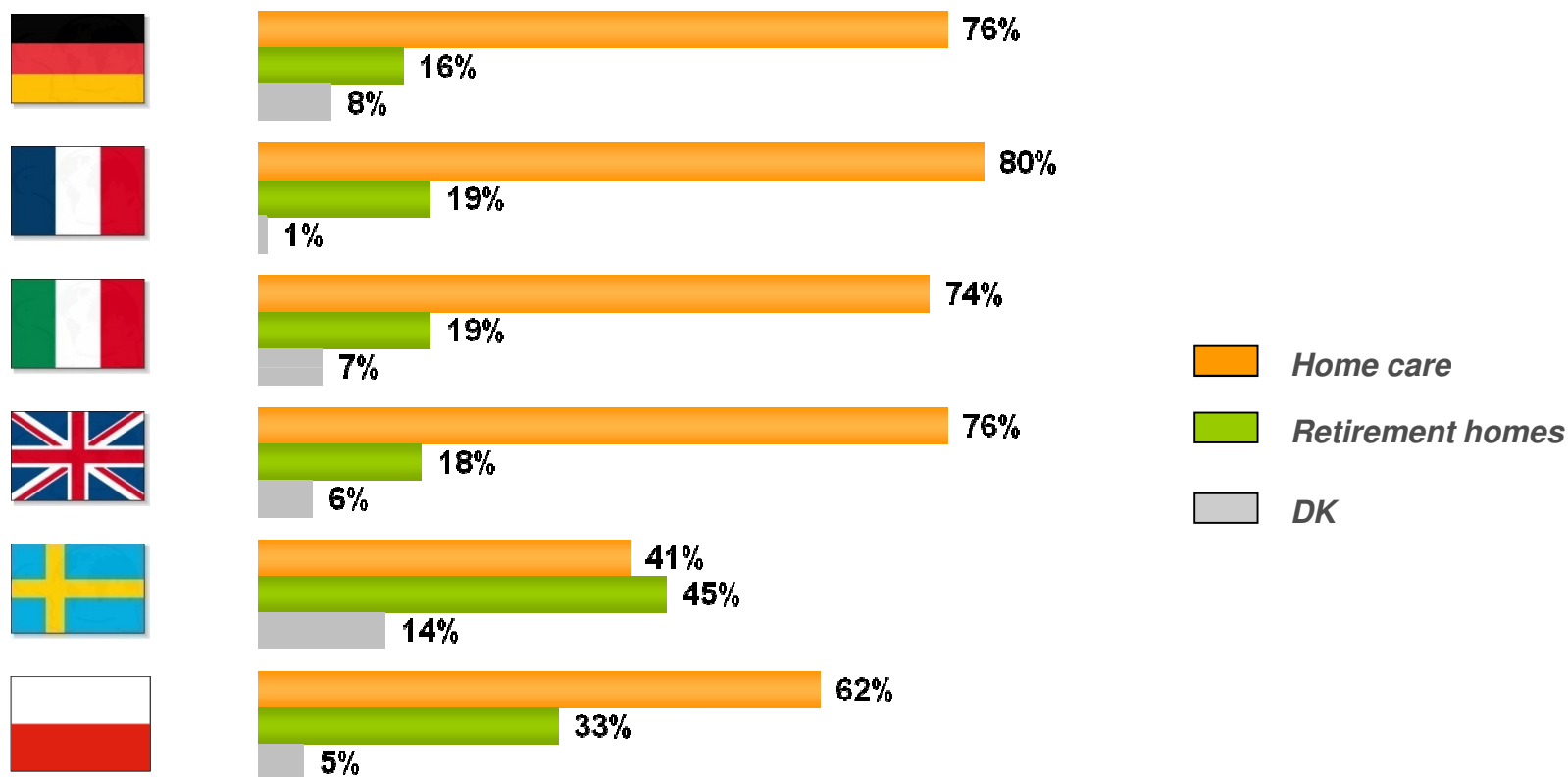
2009 : public funding for home care

In your opinion, current public funding for home care for elderly and dependent people in our country is...



2009 : resources have to be mainly focused on home care

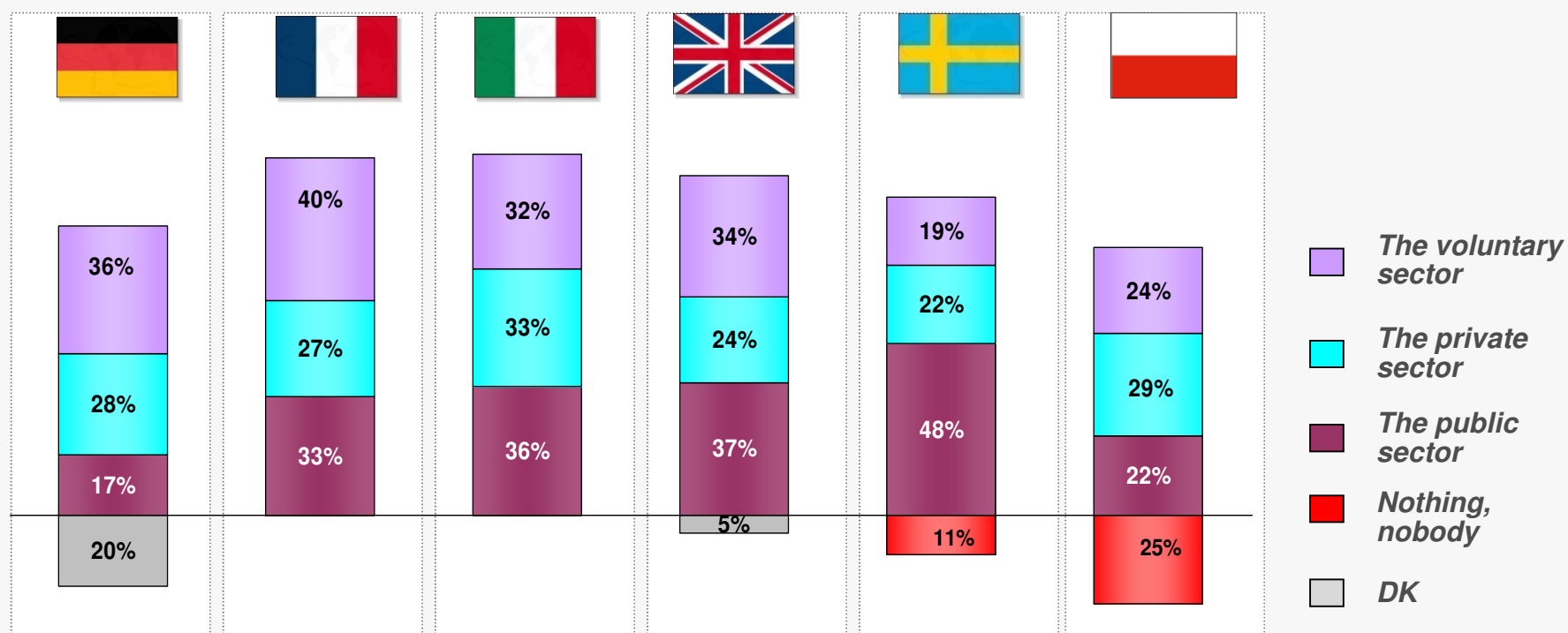
In your opinion, in dealing with the problems presented by longer life expectancy and the increase in the number of elderly and dependent people, where should resources be focused on at the moment in your country?



2009 : facilities offering the best support to families

If you are currently looking after, or ever had to look after an elderly and dependent relative or someone close to you, which of the following offered you the best support?

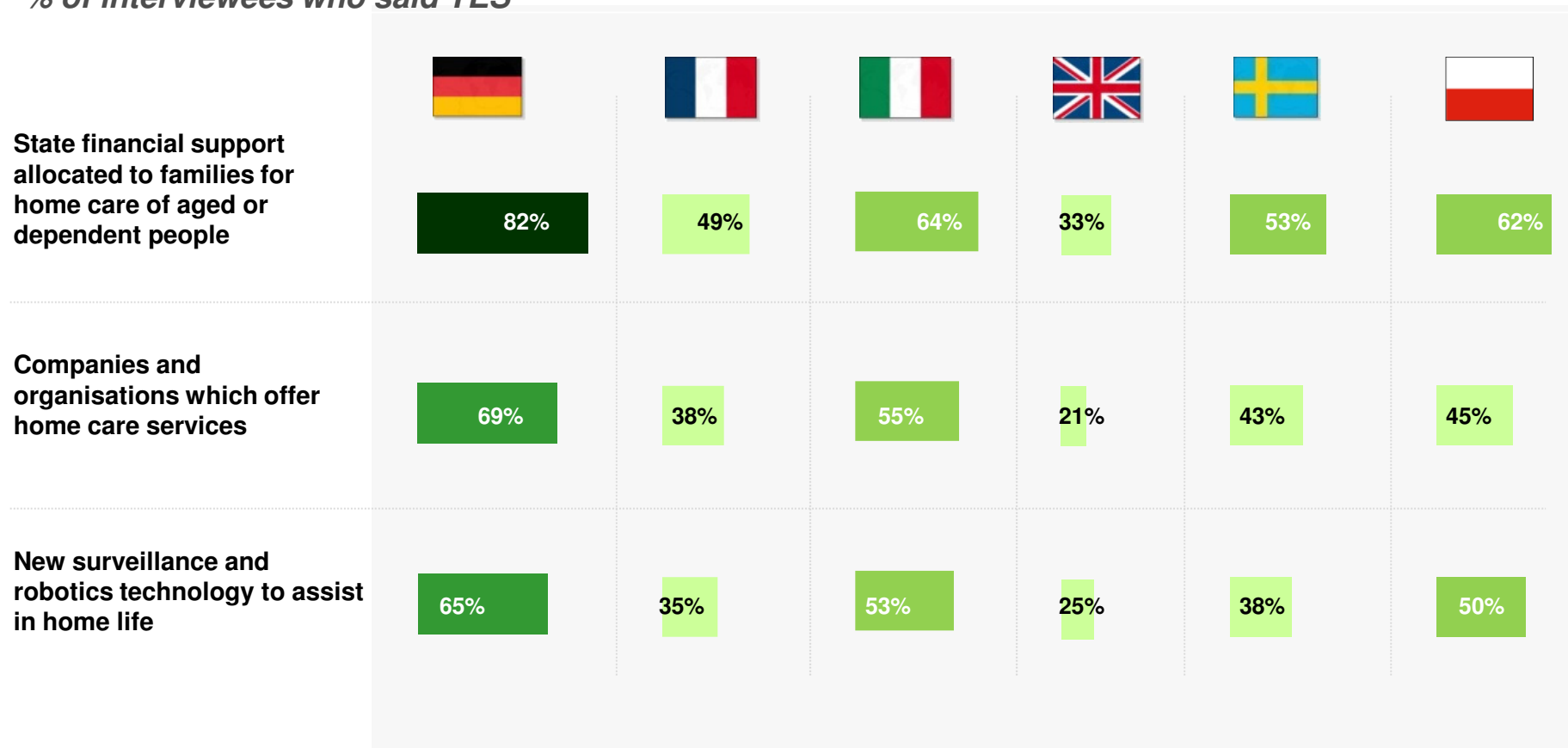
If you had someone close to you who was elderly and dependent, which of the following do you think would offer you the best support?



2009 : demand for information about home care

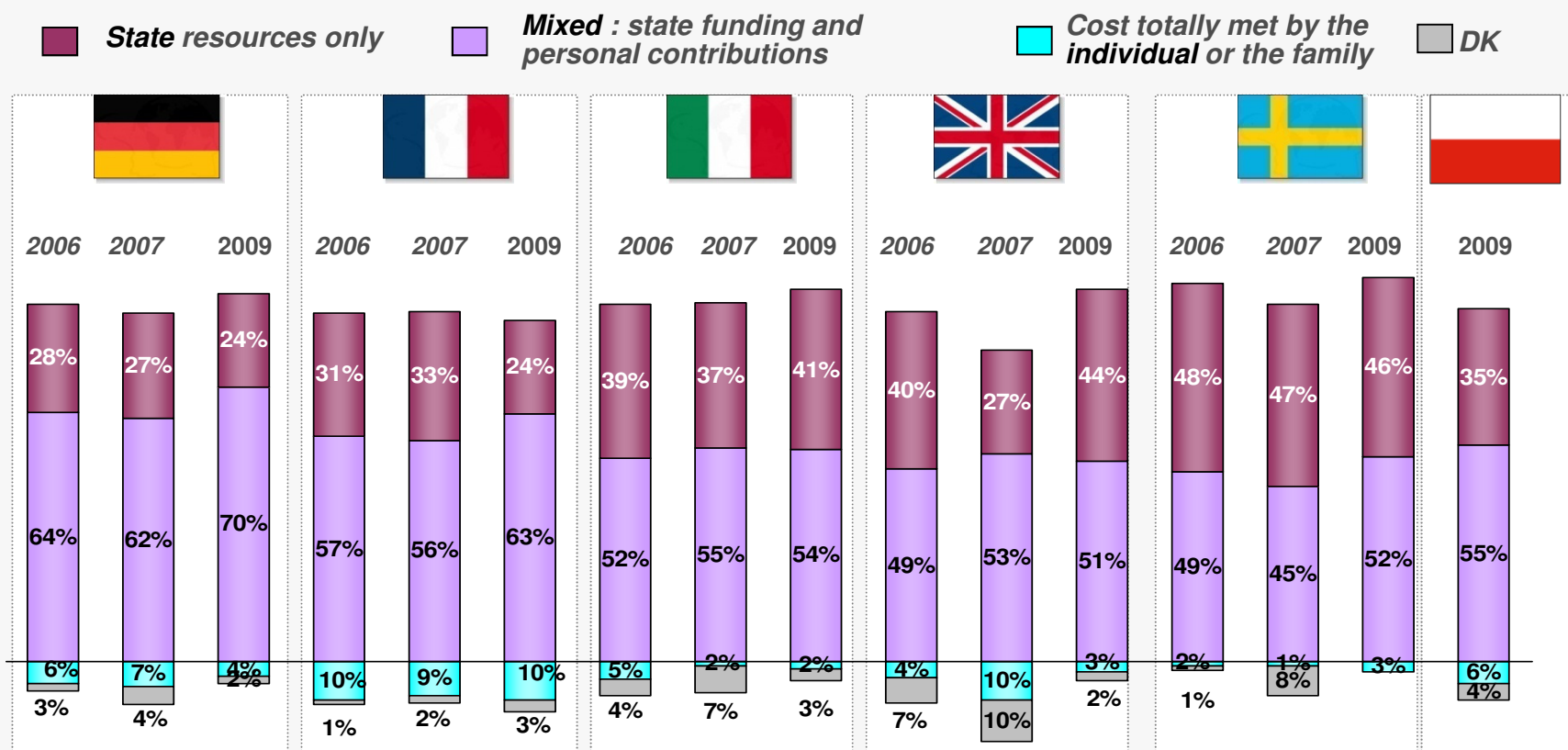
Would you or would you not wish to receive more information regarding:

% of interviewees who said YES

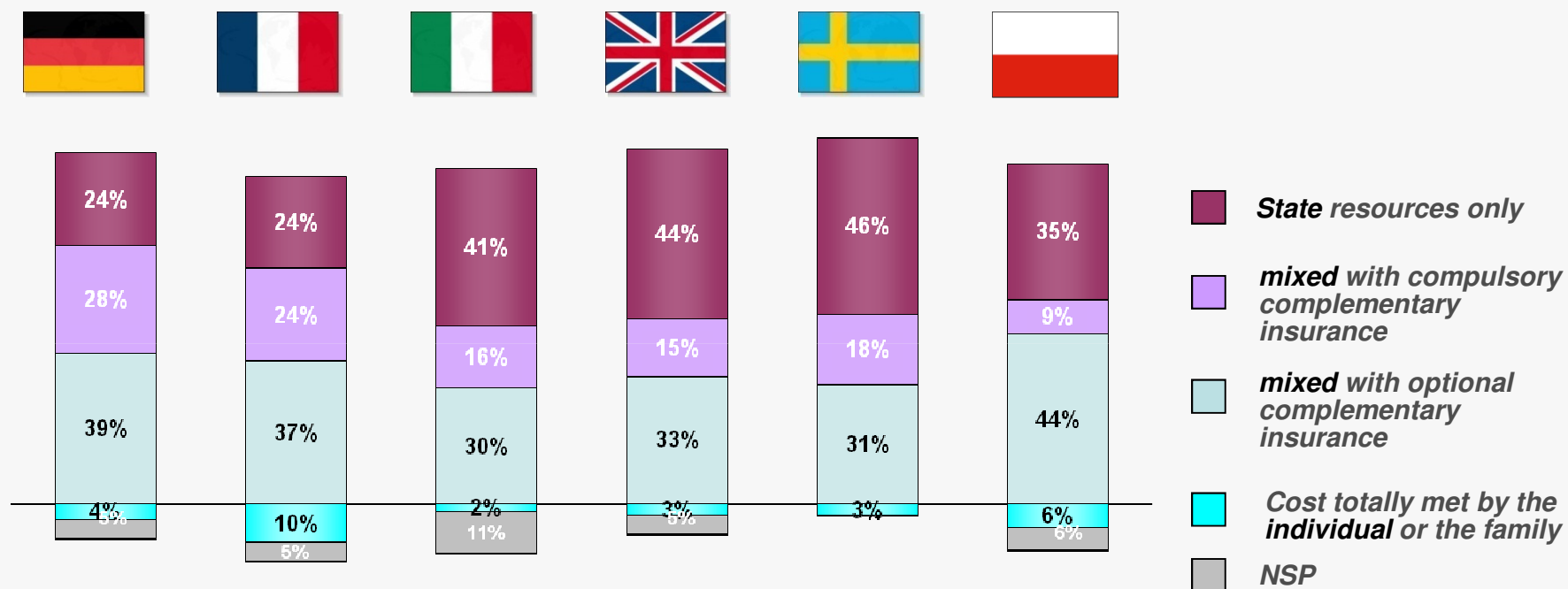


2006-2007-2009 : changes

Several solutions are possible to finance services and daily care for elderly and dependent people.
Which option would you support?



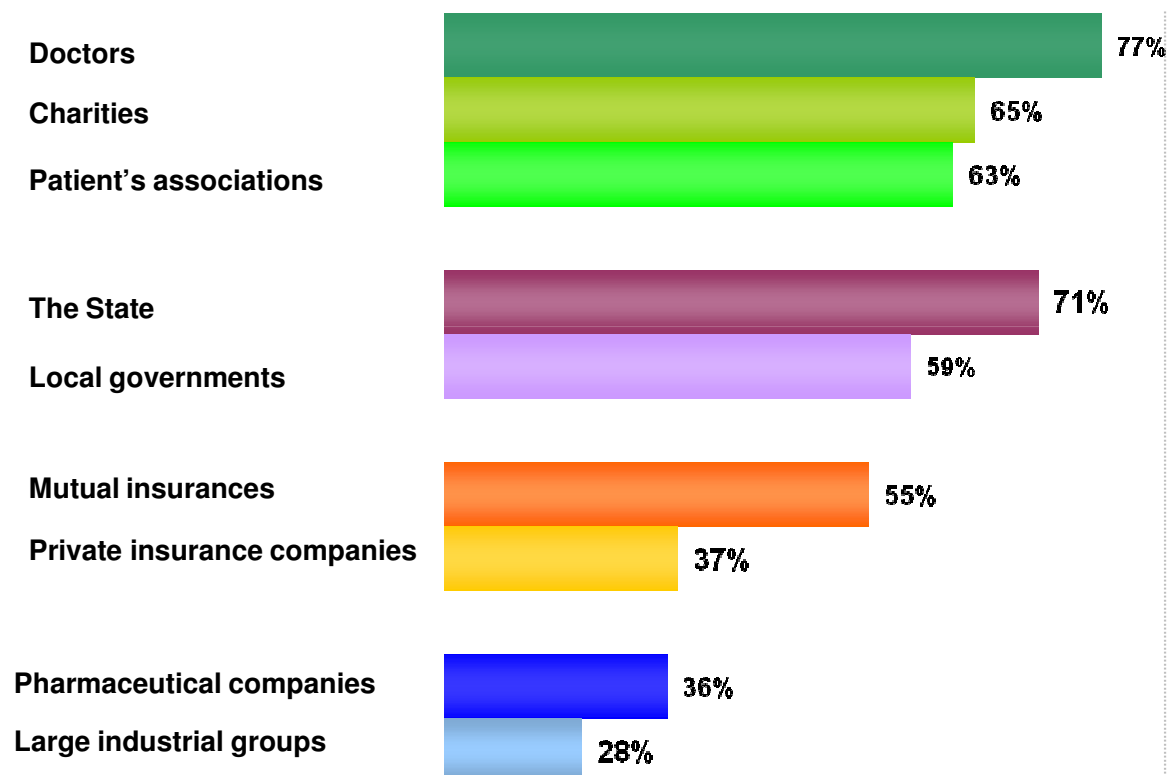
« State resources only” add to “mixed with compulsory complementary insurance” obtain the highest scores



CHAM 2009 focus:
From craft to industry

2009 : management of care establishments

Would you personally trust care establishments built and managed by...
 % of interviewees who said YES

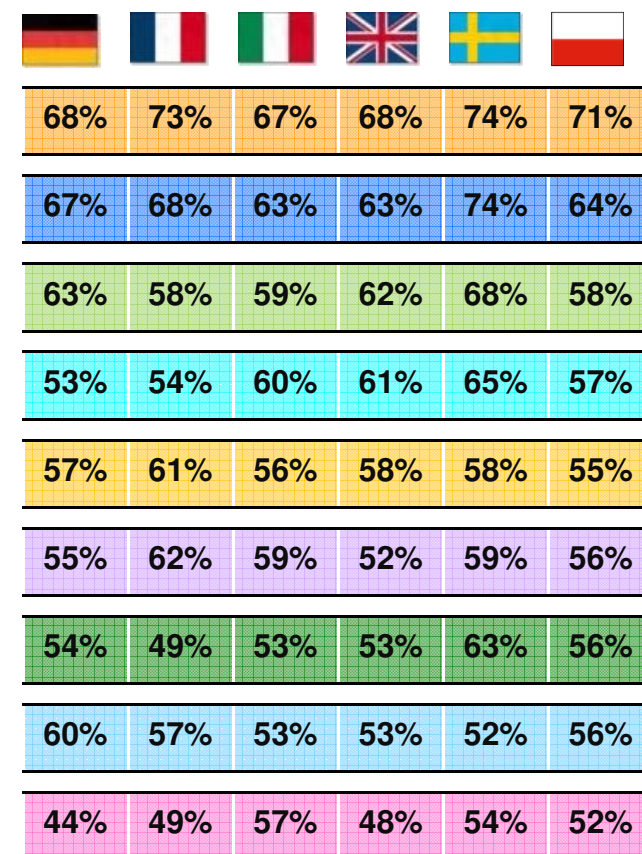
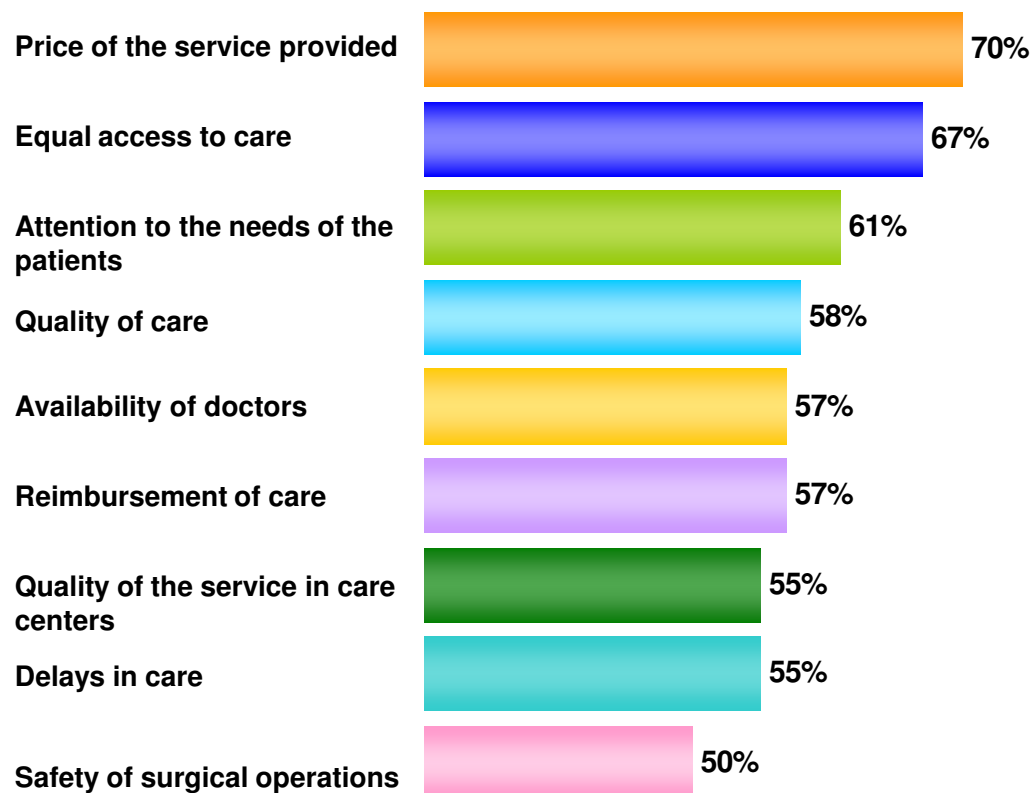


Doctors	81%	86%	67%	85%	81%	65%
Charities	74%	60%	52%	73%	67%	66%
Patient's associations	66%	60%	50%	68%	70%	66%
The State	62%	81%	68%	64%	92%	62%
Local governments	46%	72%	54%	48%	80%	54%
Mutual insurances	66%	57%	58%	55%	54%	42%
Private insurance companies	40%	29%	34%	41%	42%	36%
Pharmaceutical companies	20%	34%	41%	35%	37%	50%
Large industrial groups	20%	22%	28%	27%	38%	36%

2009 : adapting the methods of the private sector to the healthcare

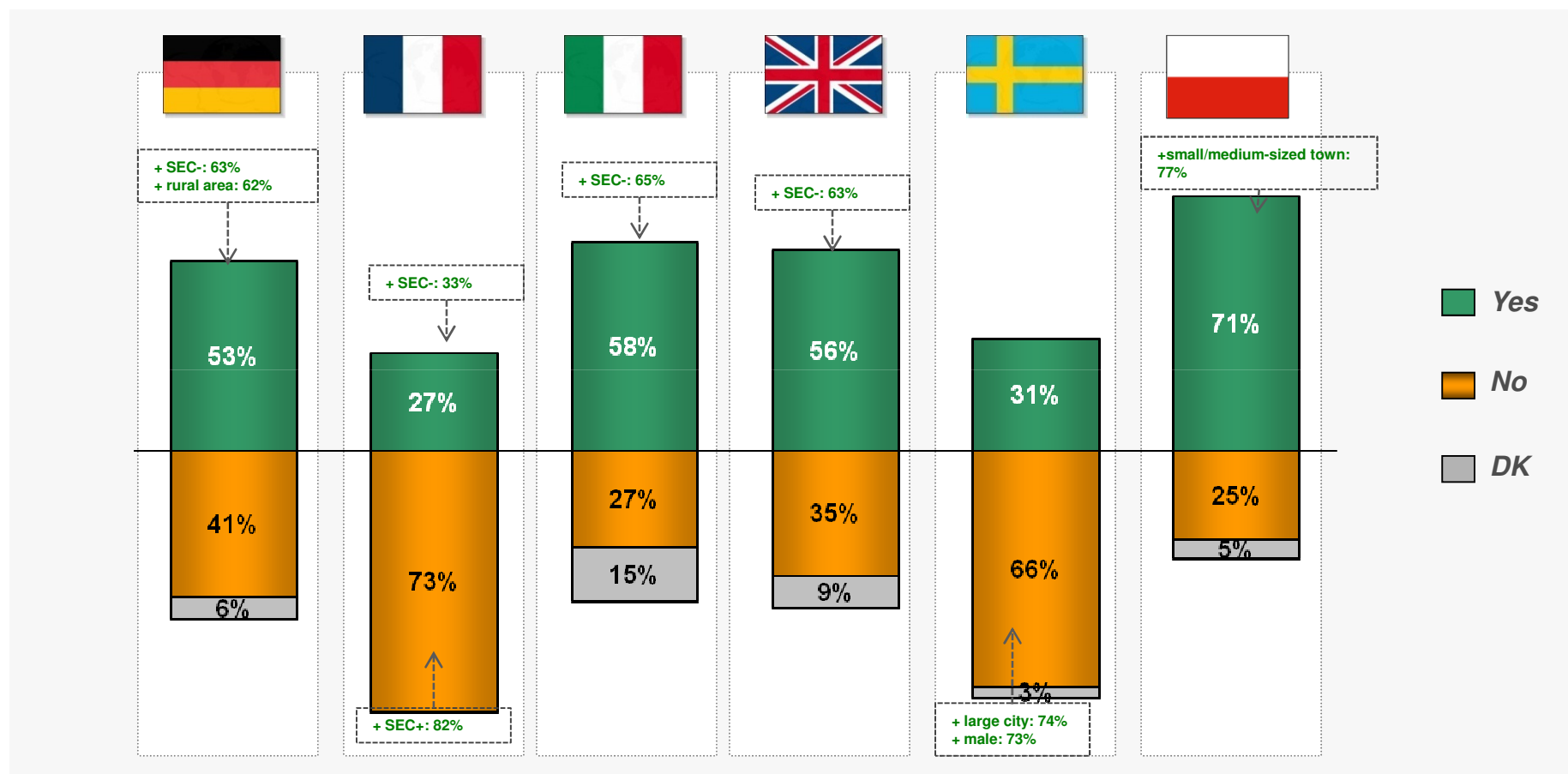
Do you think that adapting to the health sector the methods of the private sector to have both personalised care and security while maintaining the profitability of the services would post a risk to:

% of respondents who responded YES



2009 : profitability requirements for care establishments

In your opinion, should care establishments be subject to the same profitability requirements as other companies ?



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