

Healthcare in Europe and in the USA



6th edition:

graphics - main results

September 28th 2012

1



**Baromètre
Cercle Santé
Europ Assistance**

**europ
assistance**
you live we care

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

In a context of a sector in continuous mutation, the objective of this barometer is to shed light on the position of citizens to bring in the debates in the healthcare sector.

Survey topics:

➤ Focus 2012 : Well-being and quality of life

➤ Barometer





- 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



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10 countries studied

Year	Countries	Effectives	
2006-2007	<ul style="list-style-type: none"> • Germany • France • Italy • United-Kingdom • Sweden 	<ul style="list-style-type: none"> •400 •400 •400 •400 •400 	
2009	<ul style="list-style-type: none"> • Germany • France • Italy • United-Kingdom • Sweden • Poland 	<ul style="list-style-type: none"> •400 •400 •400 •400 •400 •400 	
2010	<ul style="list-style-type: none"> • Germany • France • Italy • United-Kingdom • Sweden • Poland • USA • Austria 	<ul style="list-style-type: none"> •400 •400 •400 •400 •400 •400 •800 •400 	
2011-2012	<ul style="list-style-type: none"> • Germany • France • Italy • United-Kingdom • Sweden • Poland • USA • Austria • Spain • Czech Republic 	<ul style="list-style-type: none"> •500 •500 •500 •500 •500 •500 •1000 •500 •500 •500 	

European countries studied

European Union

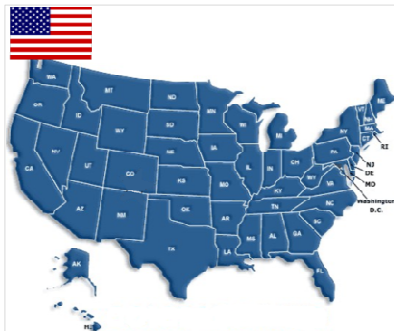
27 countries and
502 million
inhabitants



**9 countries surveyed represent
76% of all EU**

USA

50 states and 313
million inhabitants



	Total pop <i>On million</i> <small>Source : Eurostat 2011</small>	Sample	Average Age <i>years</i>
Total European Union	502		
Germany	81,8	500	43,1
France	65,4	500	39,8
Italy	60,9	500	43,0
UK	62,4	500	39,5
Spain	46,2	500	40,7
Poland	38,2	500	39,1
Czech Republic	10,5	500	40,3
Sweden	9,5	500	40,6
Austria	8,4	500	41,2
Total of 9 countries consulted	383,4	3500	41.1
	<small>On million</small>		<small>years</small>
	<small>Source : CIA Factbook 2011</small>		
USA	313	1000	37.2

- **DATA COLLECTION METHOD** : Phone at respondents home - CATI
- **SAMPLING**: National representative sample of individuals aged 18 +, quotas set on age, region and socio-professional status
- **SAMPLES SIZES** : 500 respondents aged 18 + in European countries and 1000 respondents in the United States → 5500 interviews in 10 countries
- **FIELDWORK DATES** : May-June 2012
- **QUESTIONNAIRE DURATION** : 15 minutes

Focus 2012 : Wellness and Quality of Life

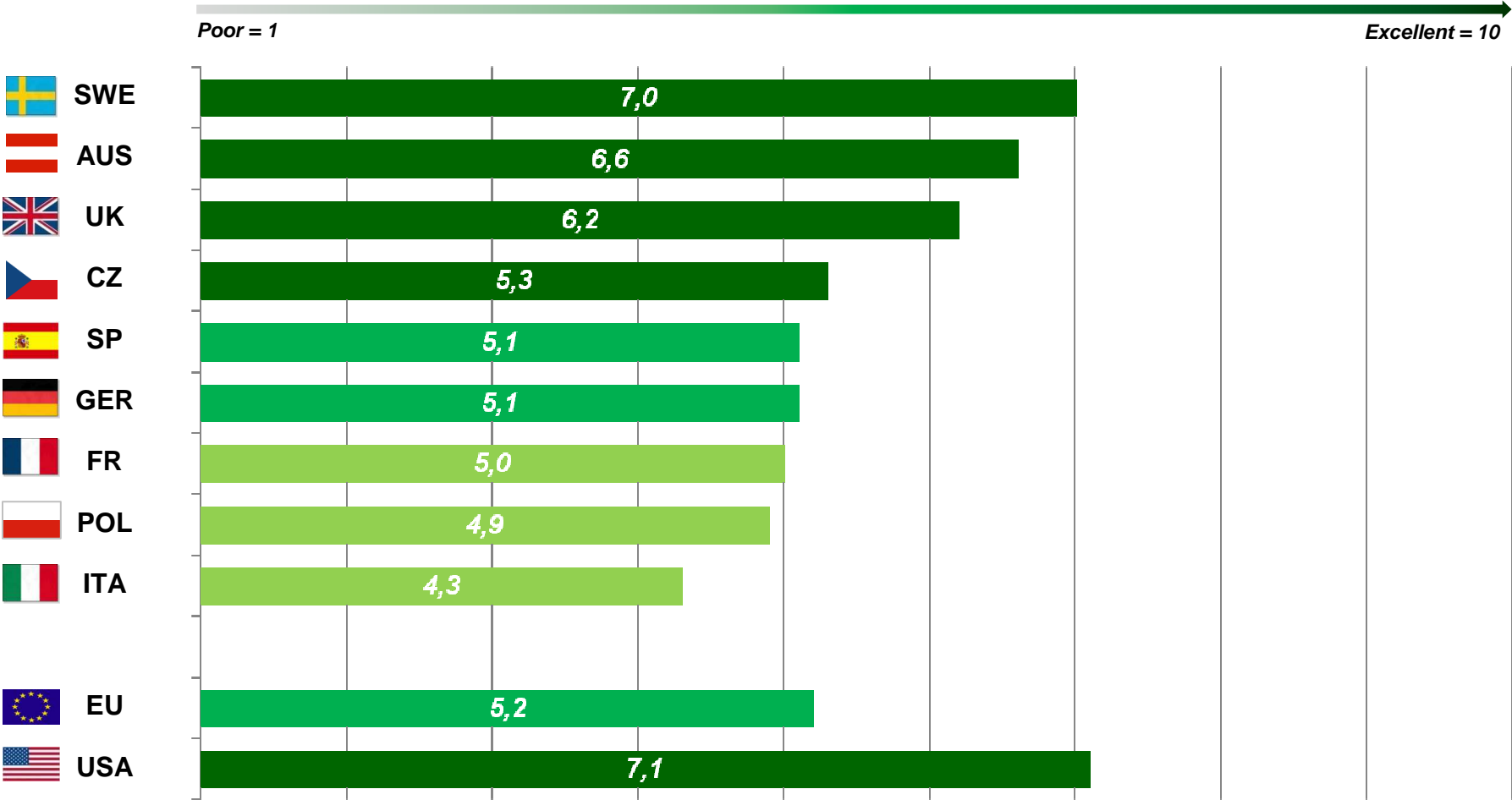


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At present, would say that your quality of life is bad, rather good, good, very good, excellent, DK?

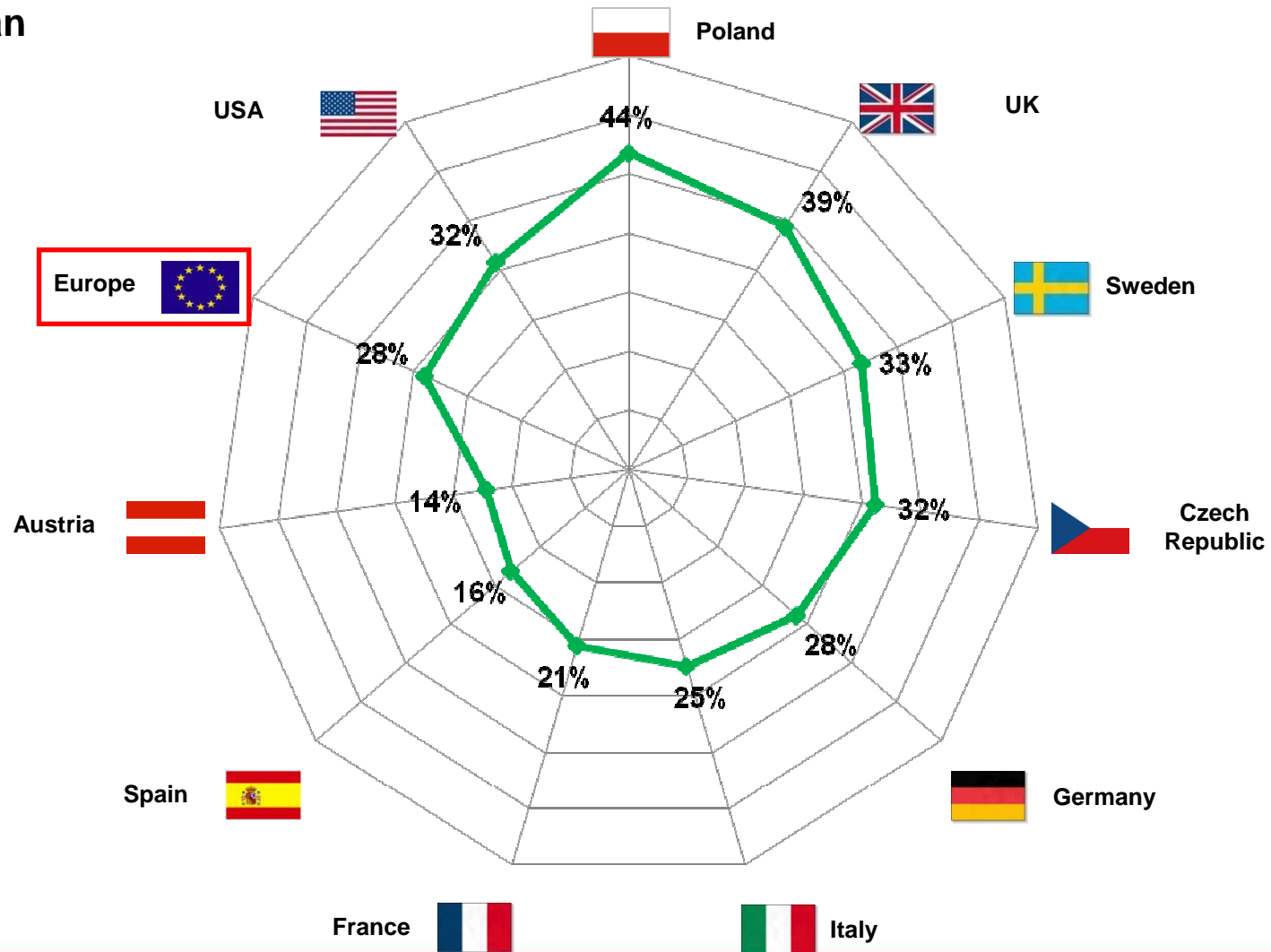
Score calculated with following values : poor = 1, average = 3,25, good = 5,5, very good = 7,75, excellent = 10



Quality of life for futures generations

And for the future, do you think that your children will have a quality of life which is...

■ % of Better than yours



Reading Instruction:
Each radian is equivalent to
10% of response



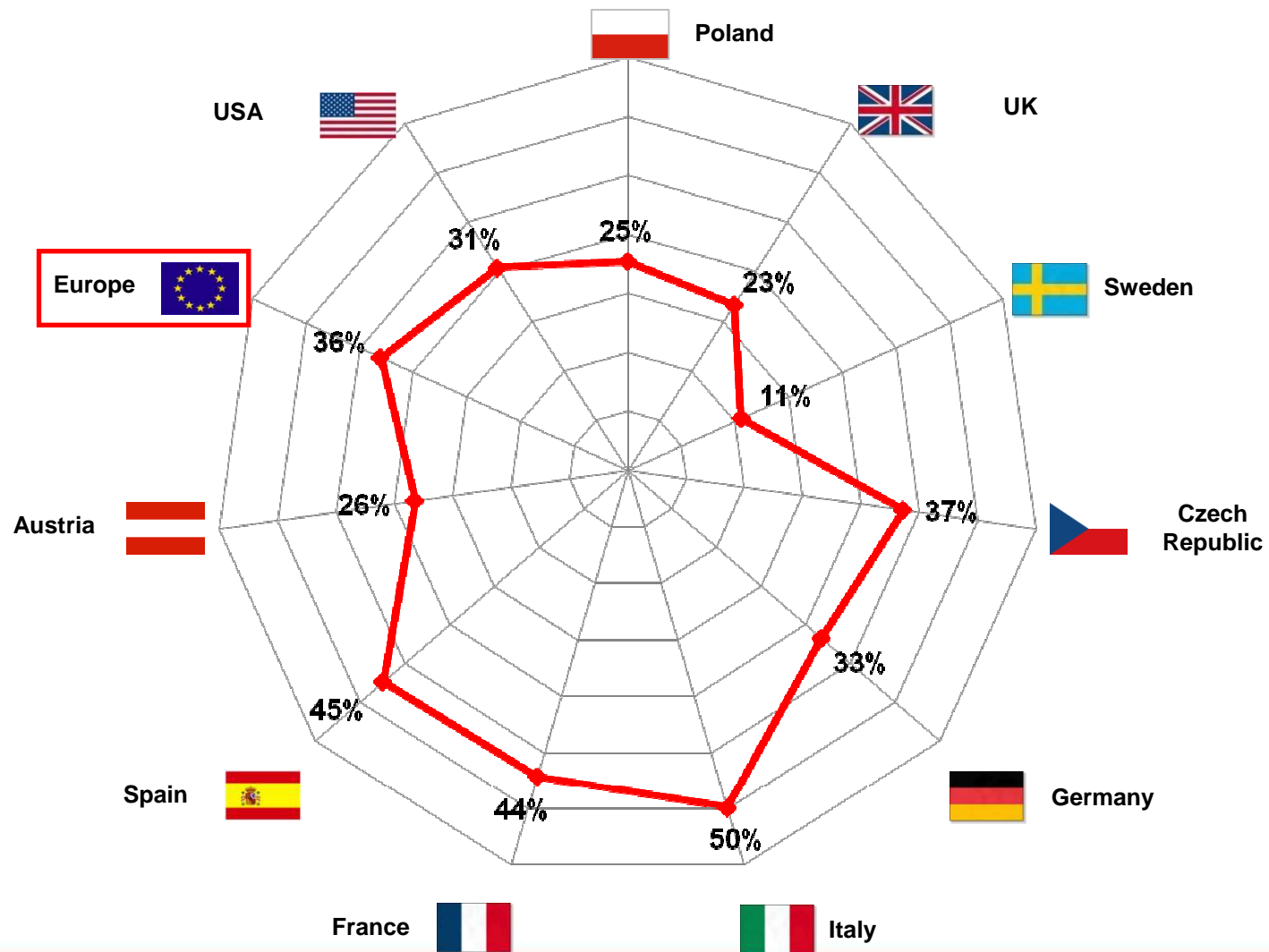
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Quality of life for futures generations

And for the future, do you think that your children will have a quality of life which is...

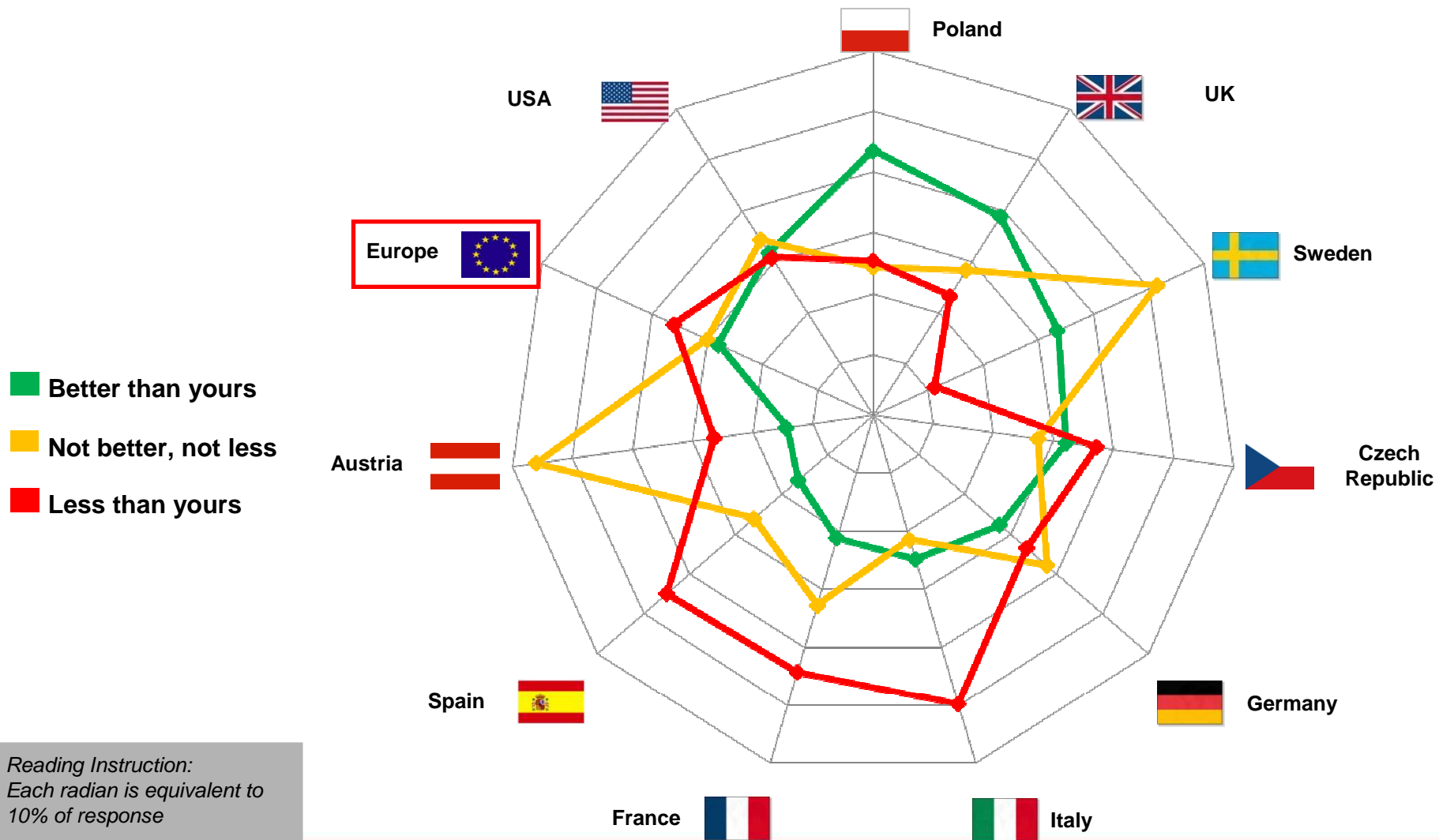
■ % of Less than yours



Reading Instruction:
Each radian is equivalent to 10% of response

Quality of life for futures generations

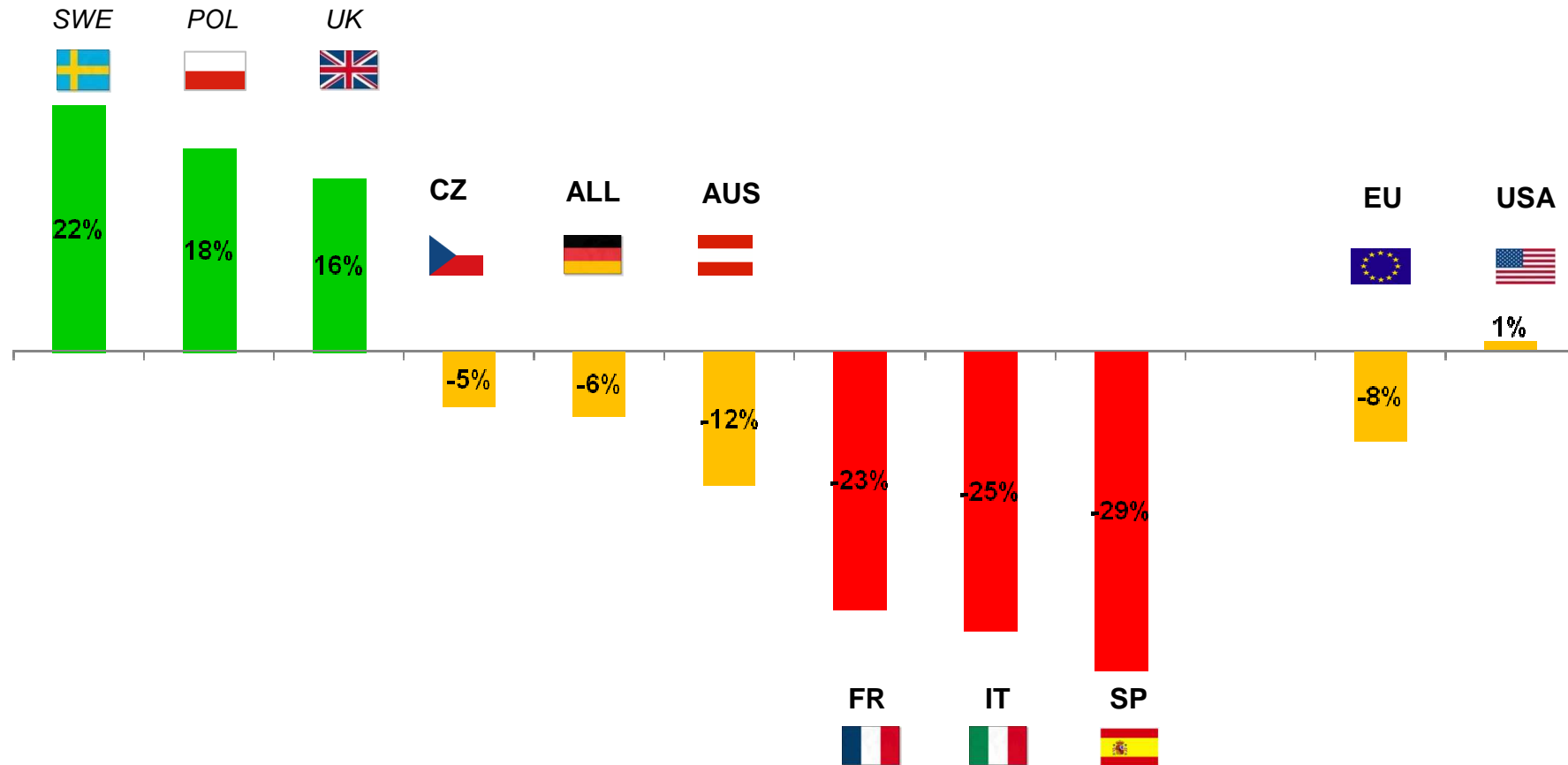
And for the future, do you think that your children will have a quality of life which is...



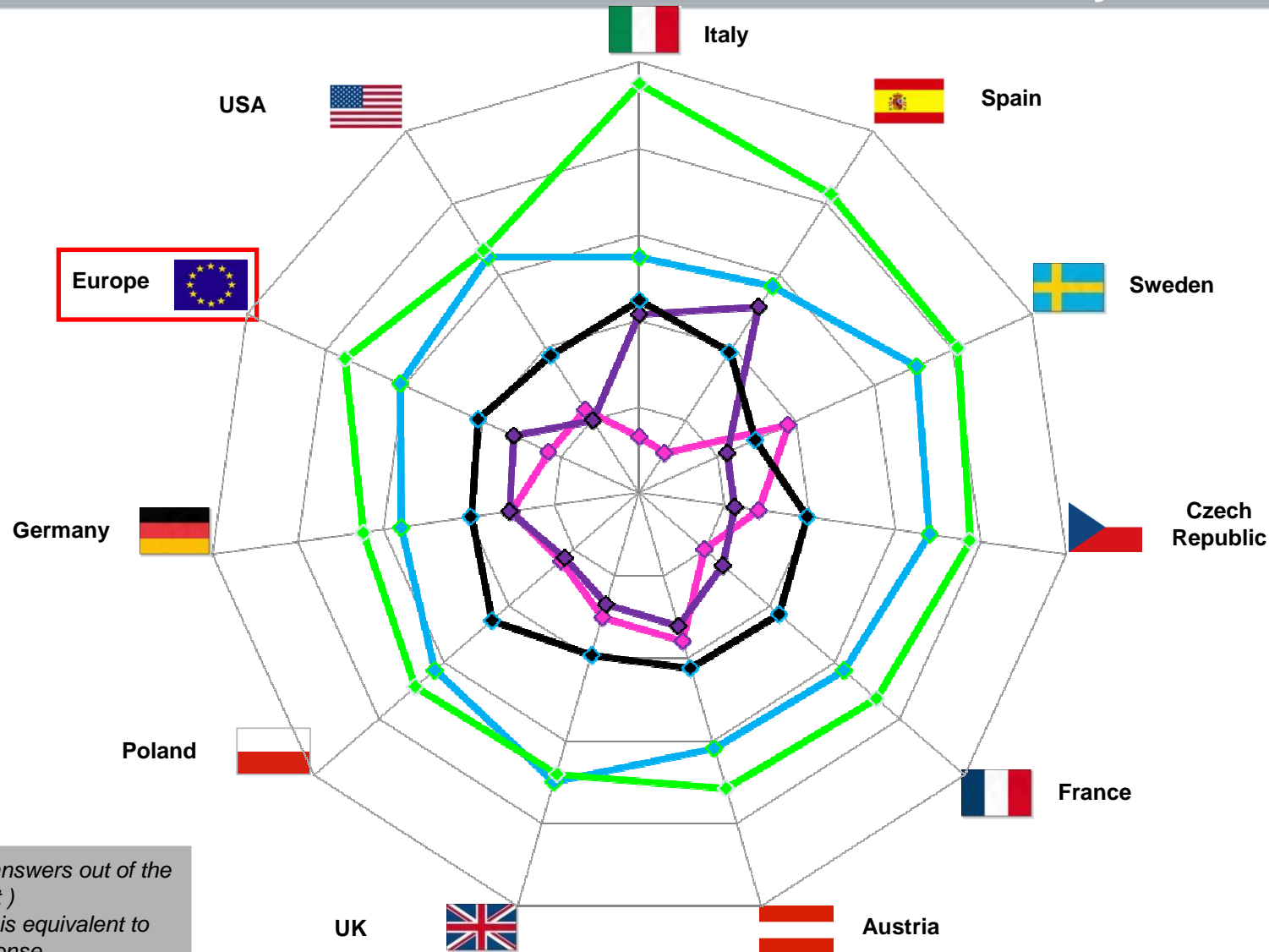
Reading Instruction:
Each radian is equivalent to
10% of response

And for the future, do you think that your children will have a quality of life which is...

As % of those who think that the quality of life will be better minus those that think that it will be worse



For you, to well-being is...?



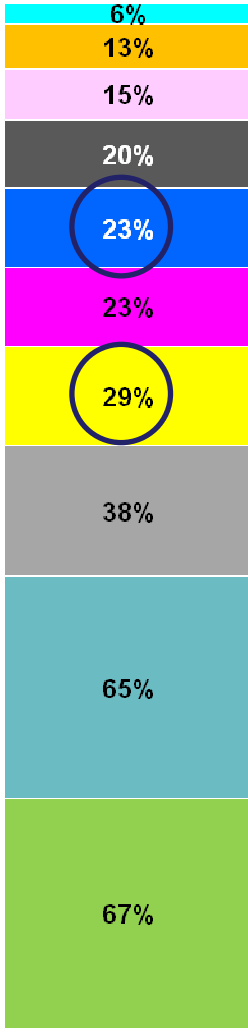
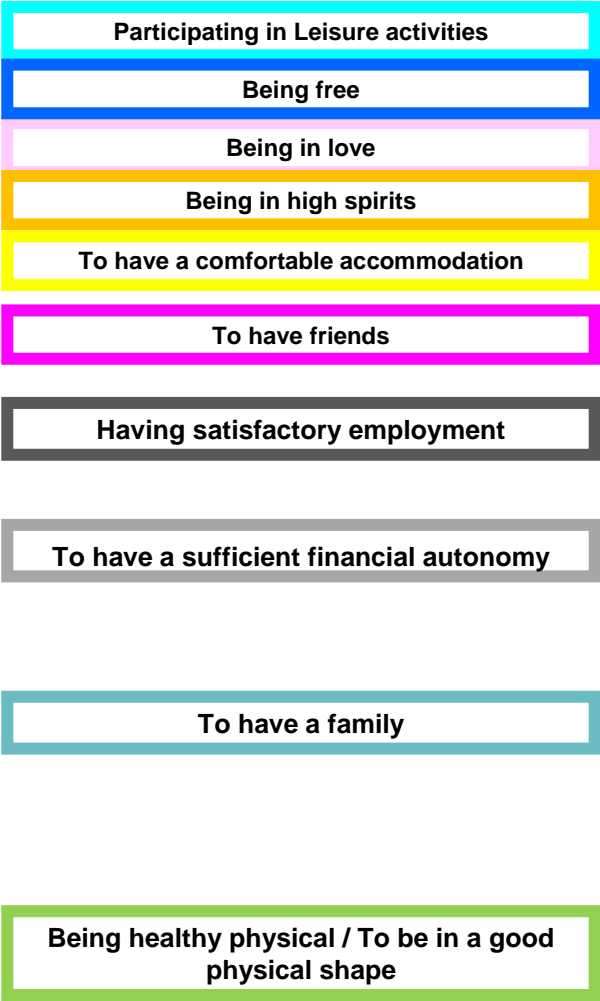
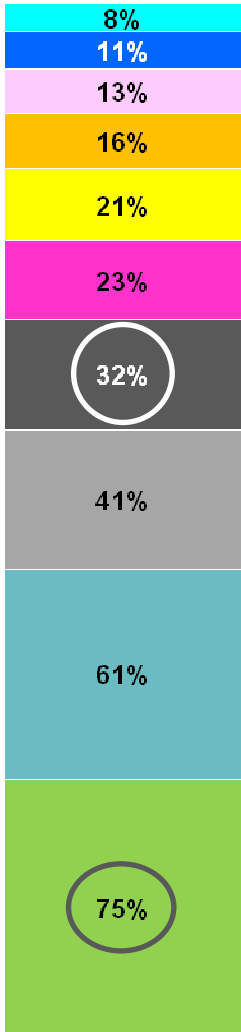
Most frequently cited items

- Being healthy physical
- To have a family
- To have a sufficient financial autonomy
- Having satisfactory employment
- To have friends

(3 possible answers out of the proposed list)
Each radian is equivalent to 20% of response

For you, to well-being is...?

Europe



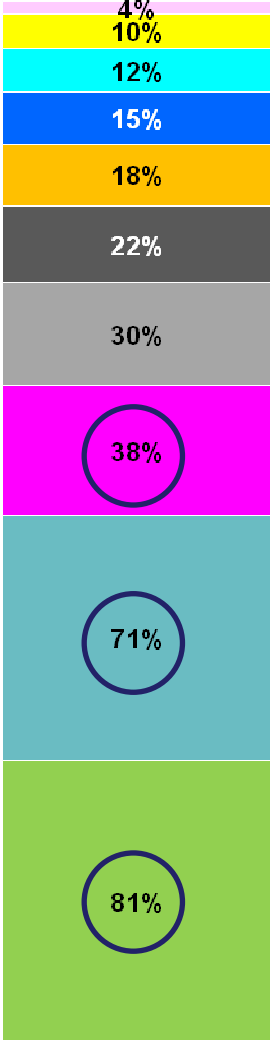
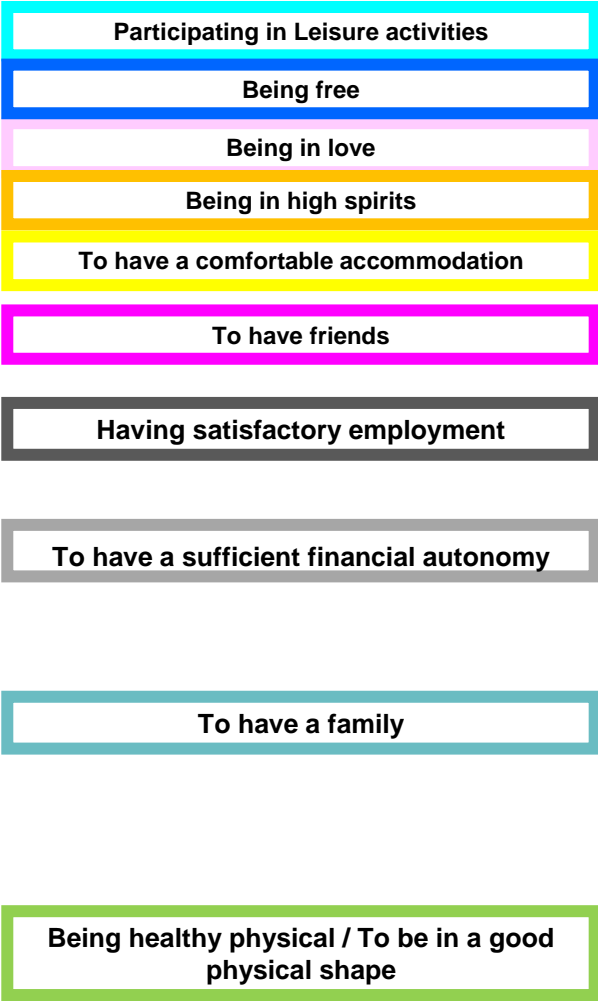
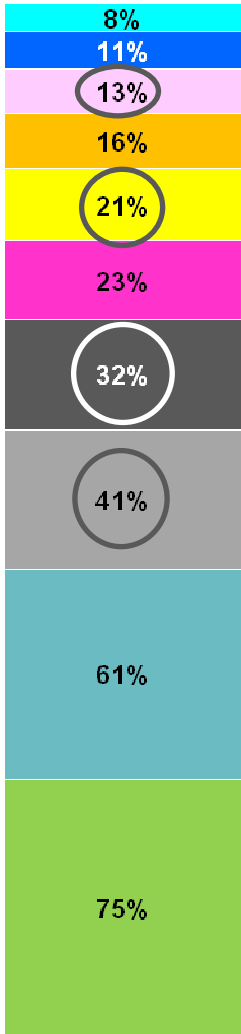
USA



Reading instruction :
3 possible answers
In %

For you, to well-being is...?

Europe



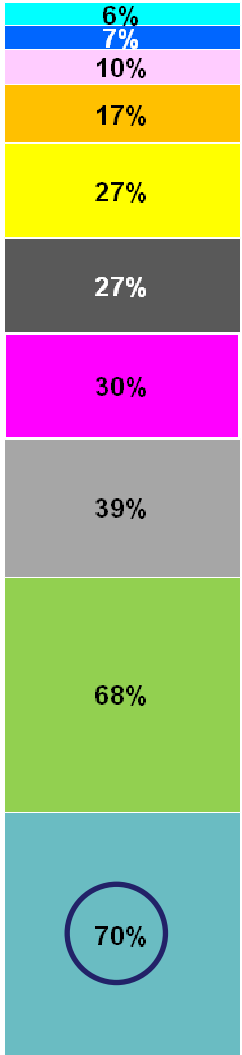
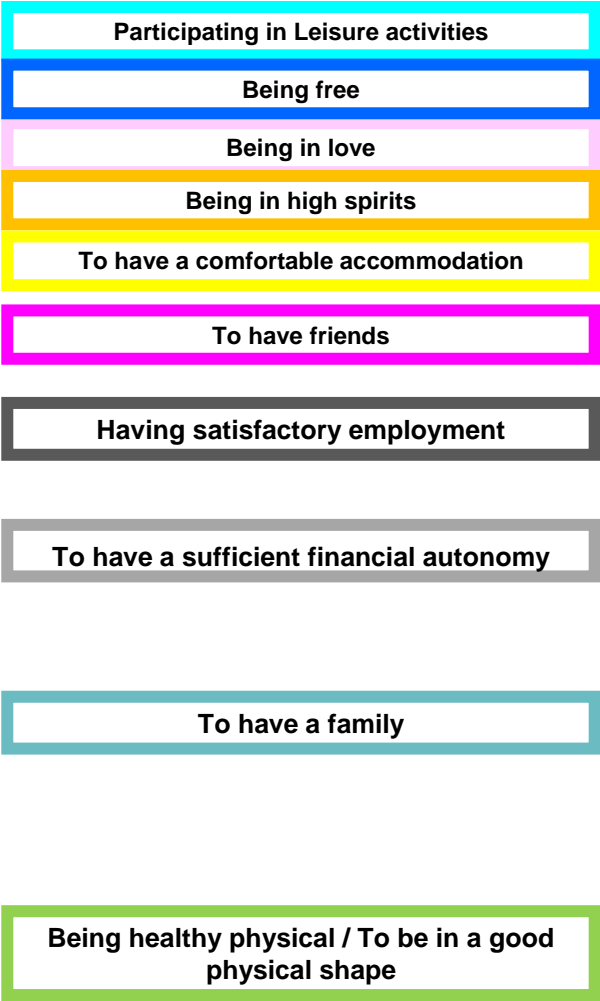
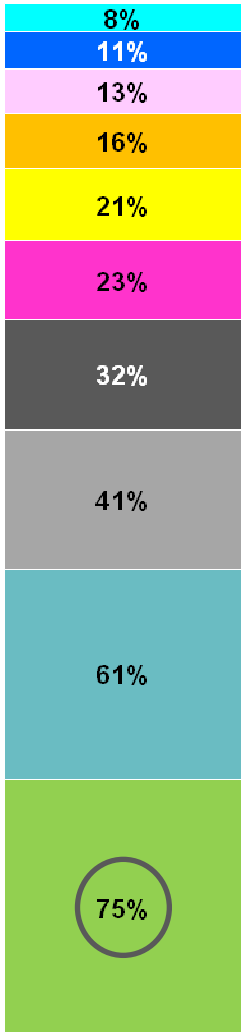
Sweden



Reading instruction :
3 possible answers
In %

For you, to well-being is...?

Europe



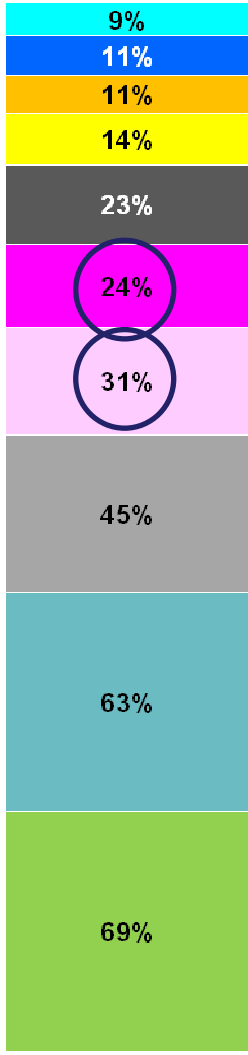
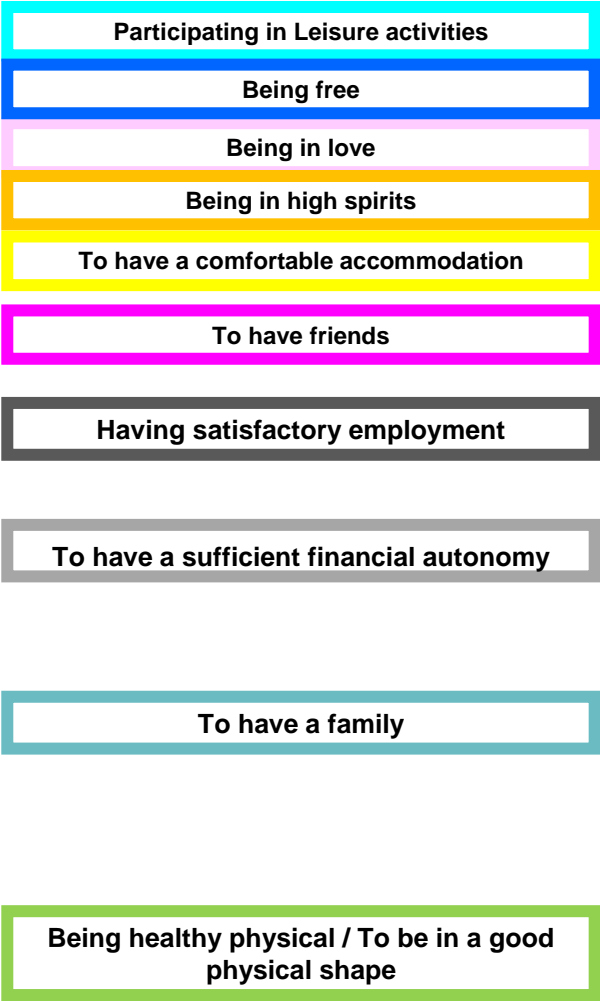
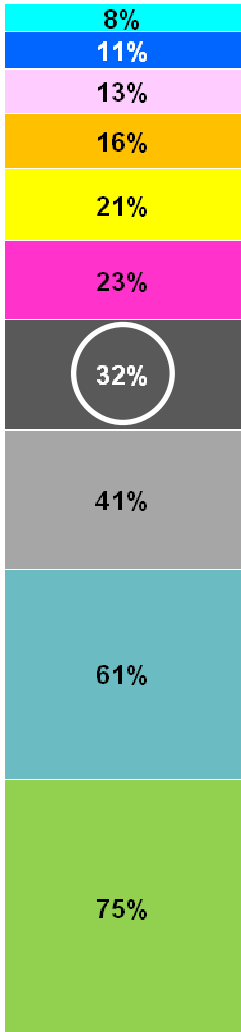
UK



Reading instruction :
3 possible answers
In %

For you, to well-being is...?

Europe



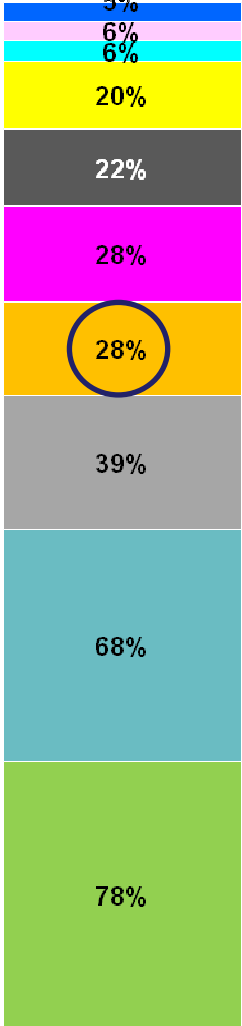
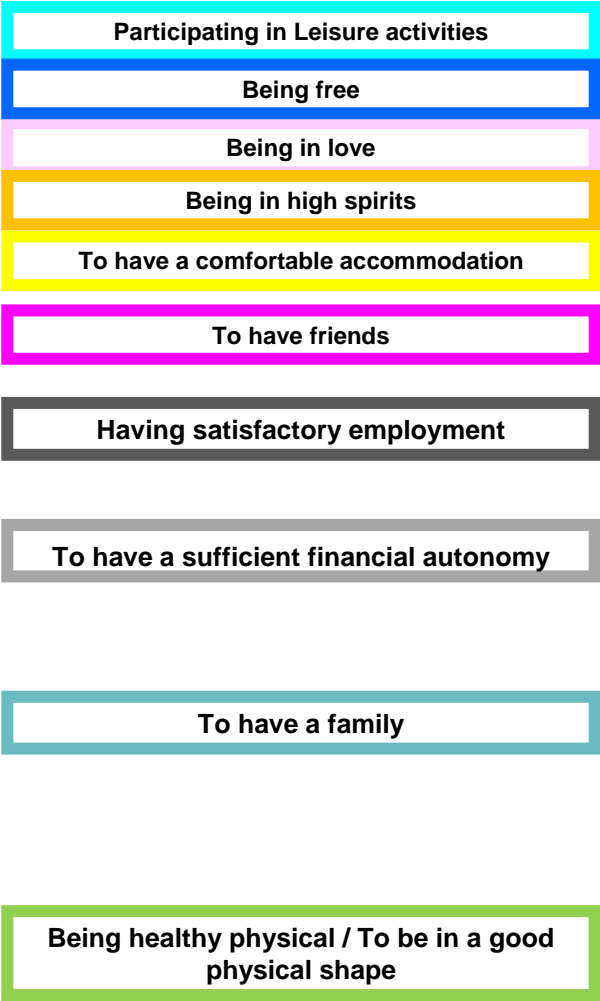
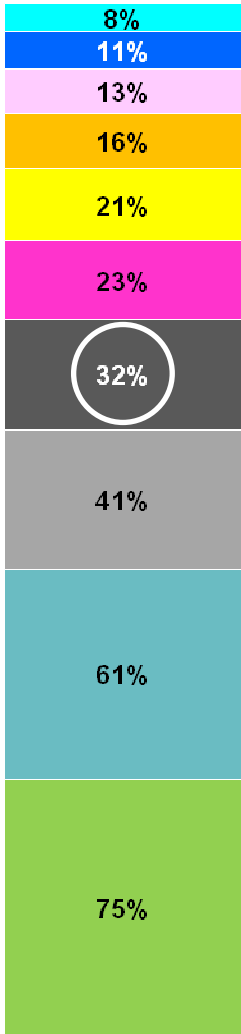
Poland



Reading instruction :
3 possible answers
In %

For you, to well-being is...?

Europe



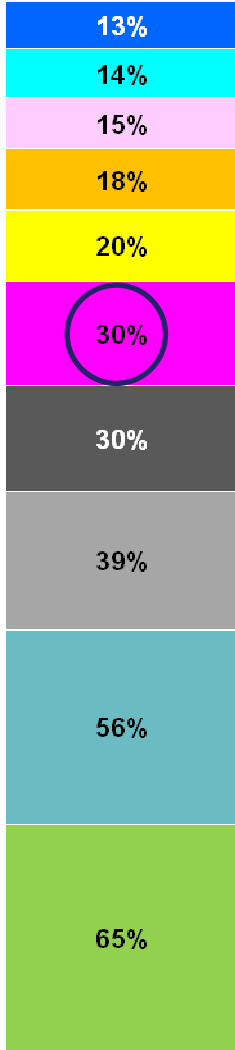
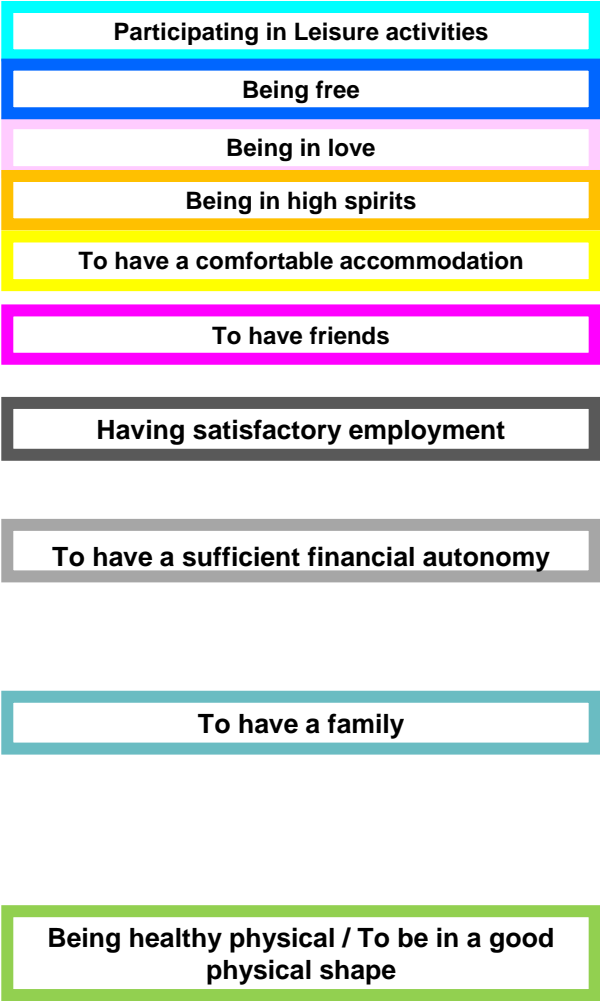
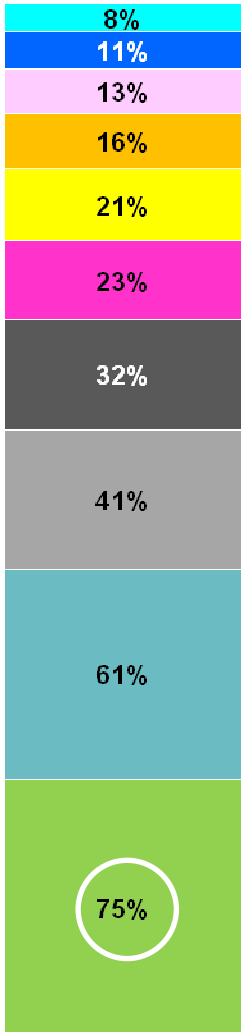
Czech Republic



Reading instruction :
3 possible answers
In %

For you, to well-being is...?

Europe



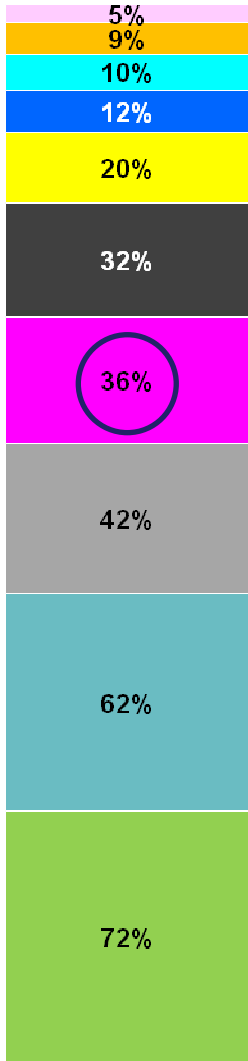
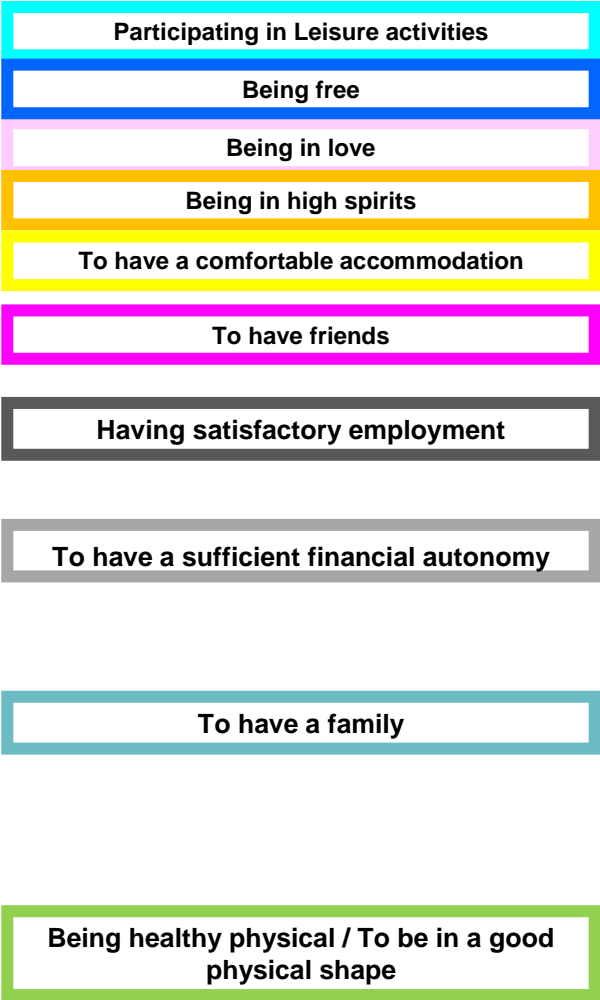
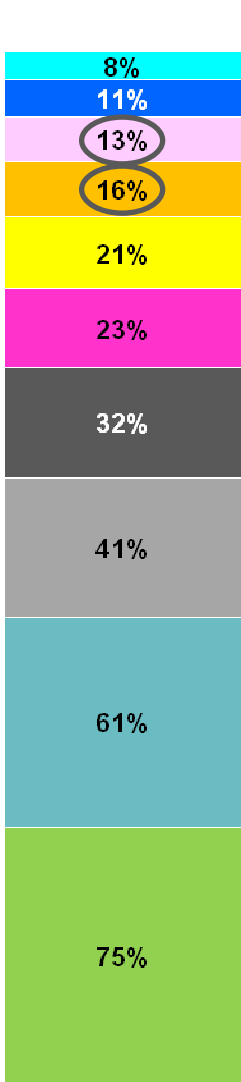
Germany



Reading instruction :
3 possible answers
In %

For you, to well-being is...?

Europe



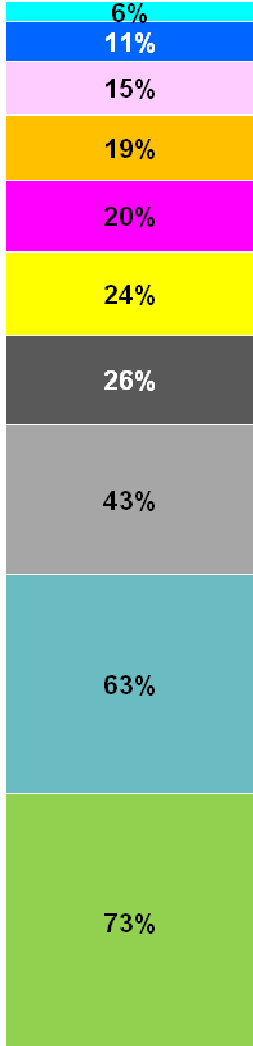
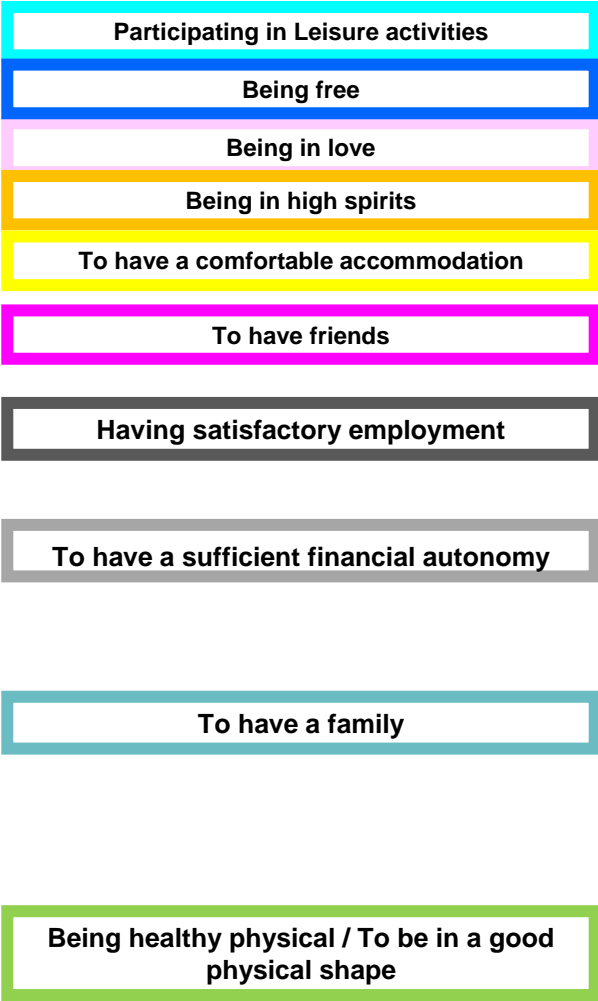
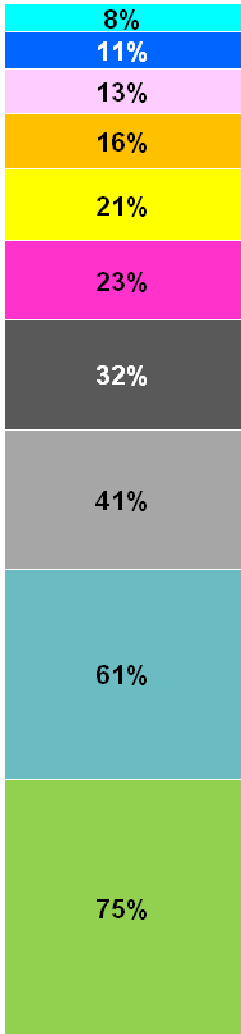
Austria



Reading instruction :
3 possible answers
In %

For you, to well-being is...?

Europe



France



Reading instruction :
3 possible answers
In %

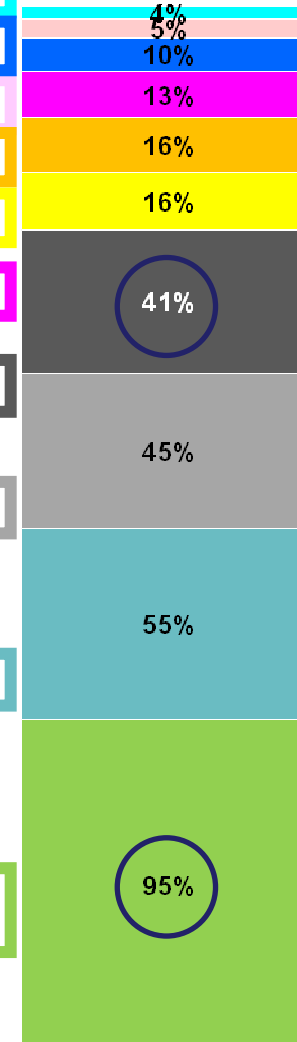
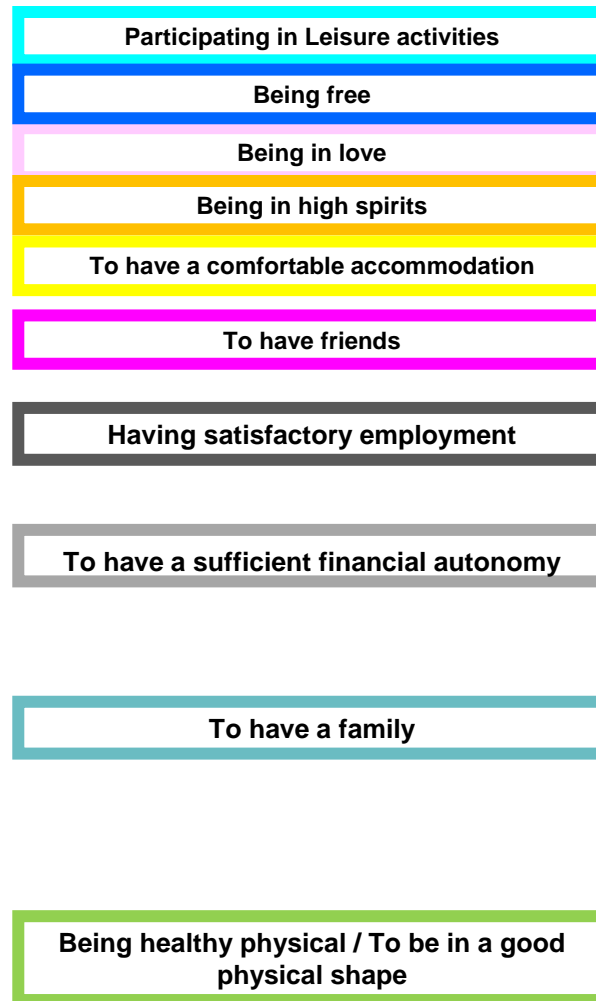
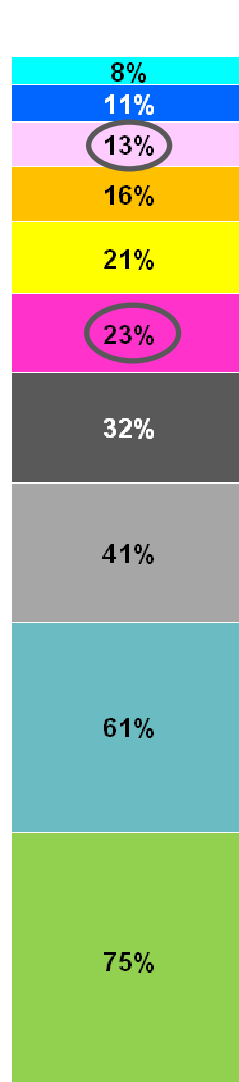


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For you, to well-being is...?

Europe



Italy



Reading instruction :
3 possible answers
In %

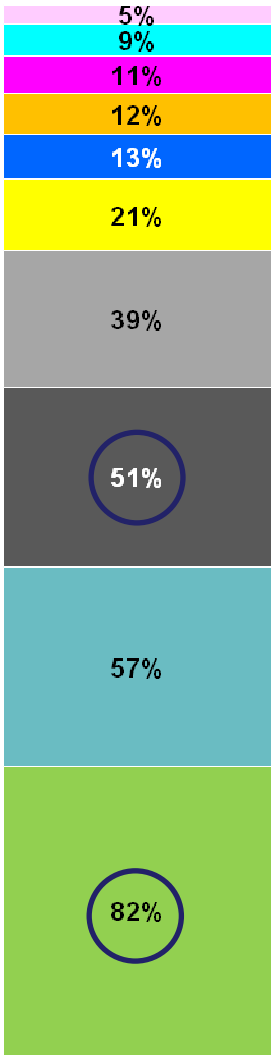
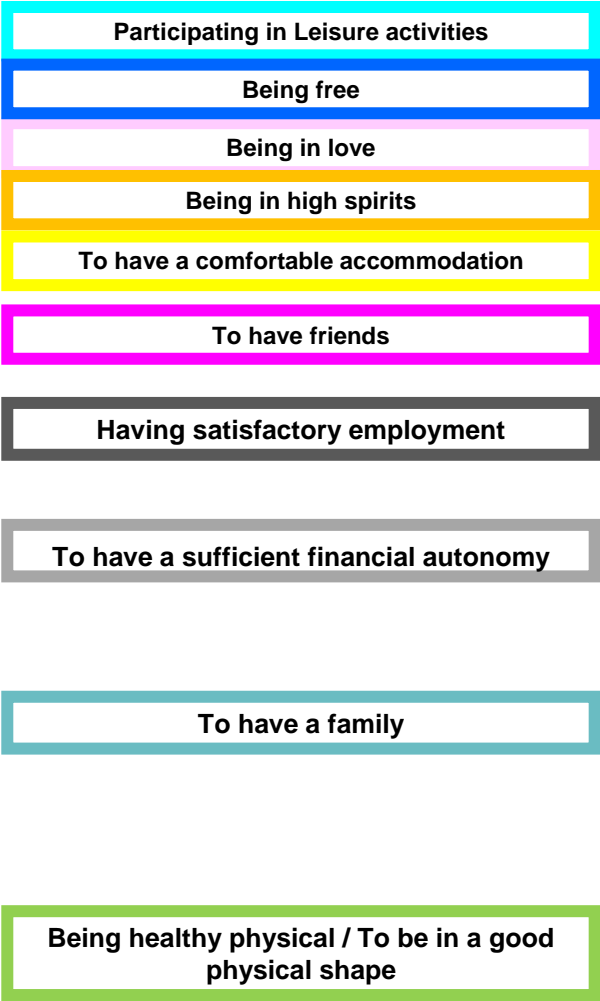
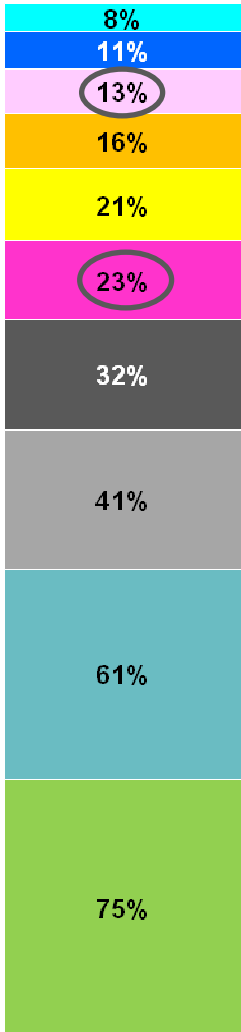


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For you, to well-being is...?

Europe

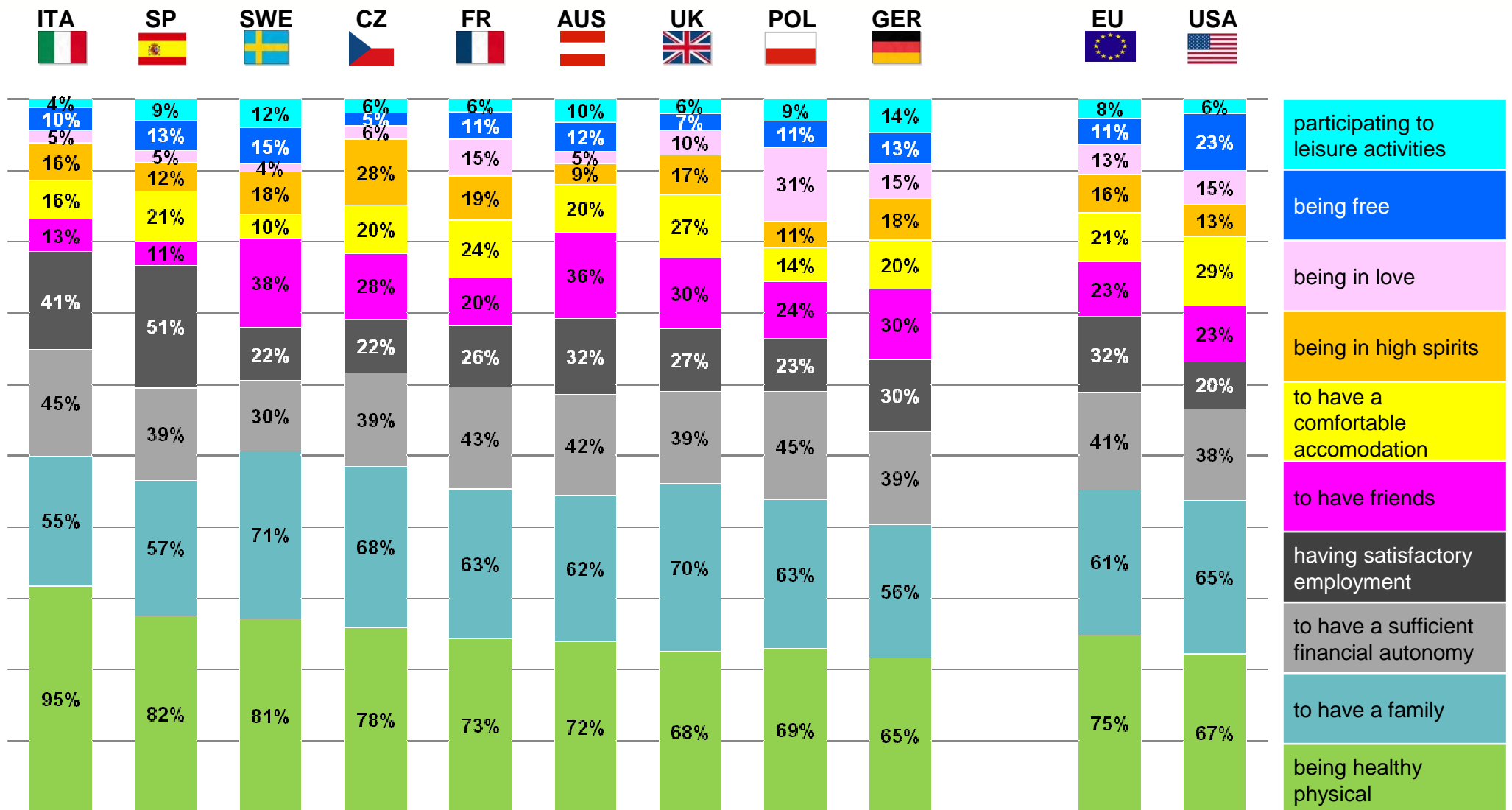


Spain



Reading instruction :
3 possible answers
In %

Summary table: For you, to well-being is...?



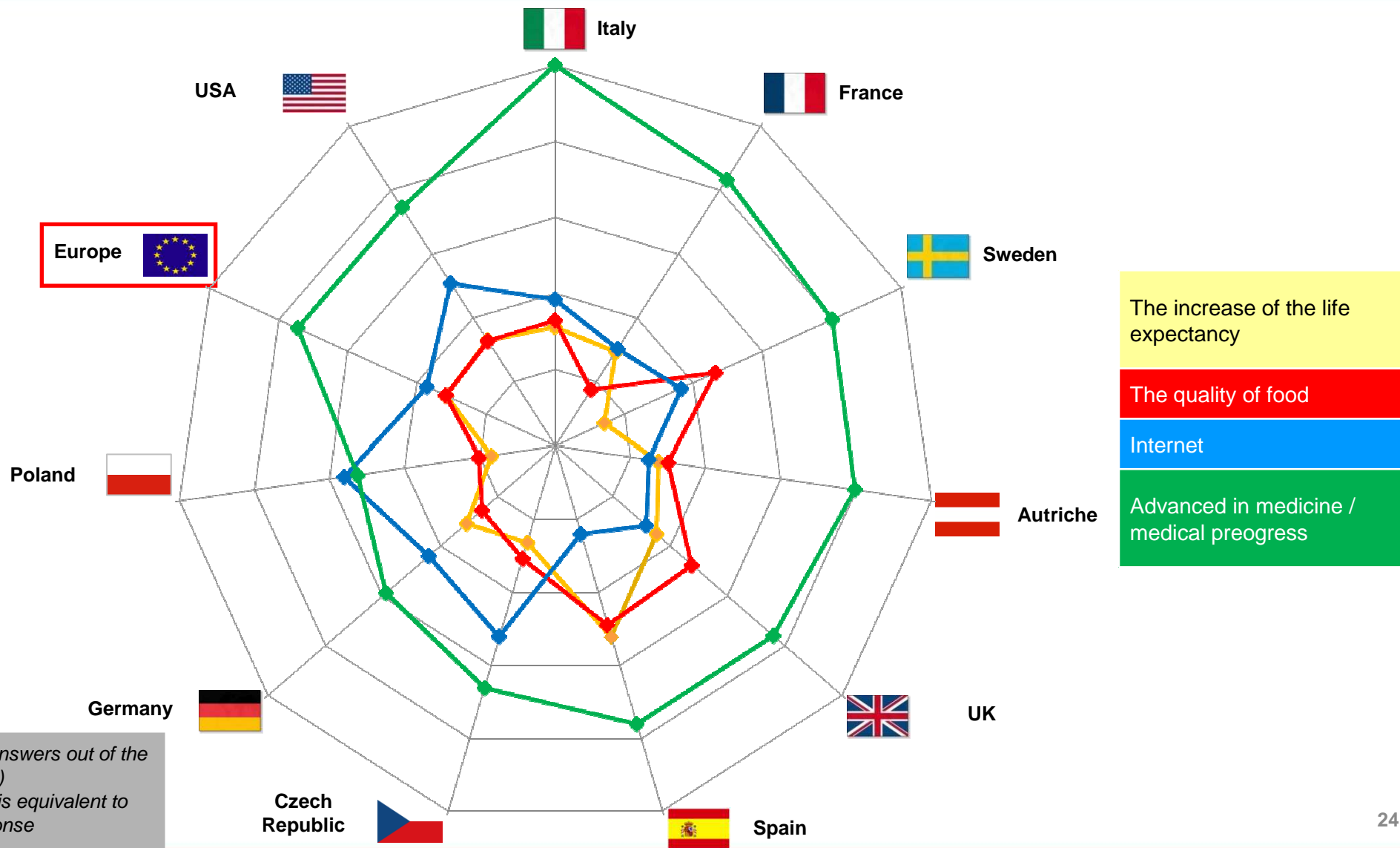
Reading instruction :
3 possible answers
In %



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Elements have played the biggest role to improving your well-being over the last few decades



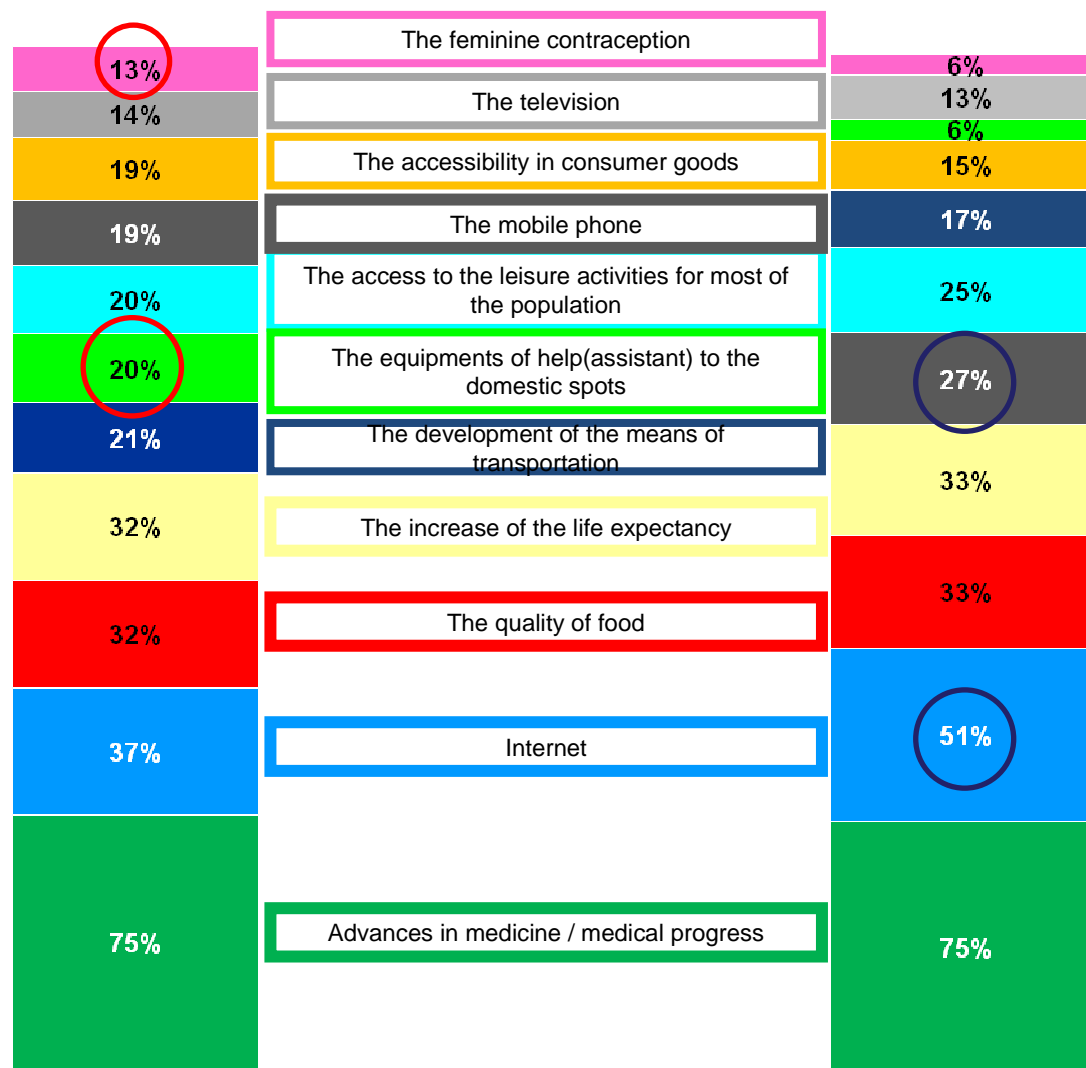
(3 possible answers out of the proposed list)
Each radian is equivalent to 10% of response

Which elements have played the biggest role to improving your well-being ?

Europe



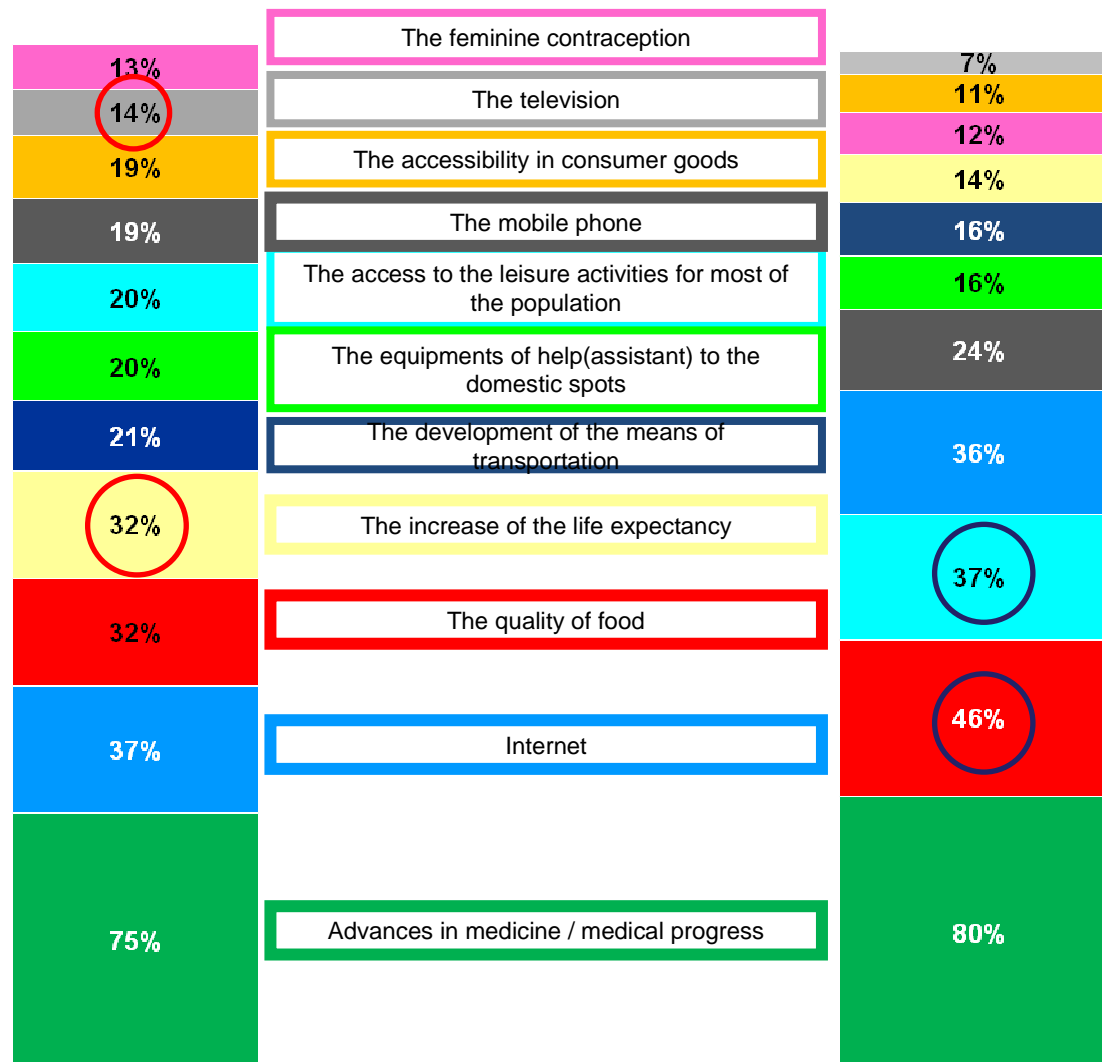
USA



Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



Sweden



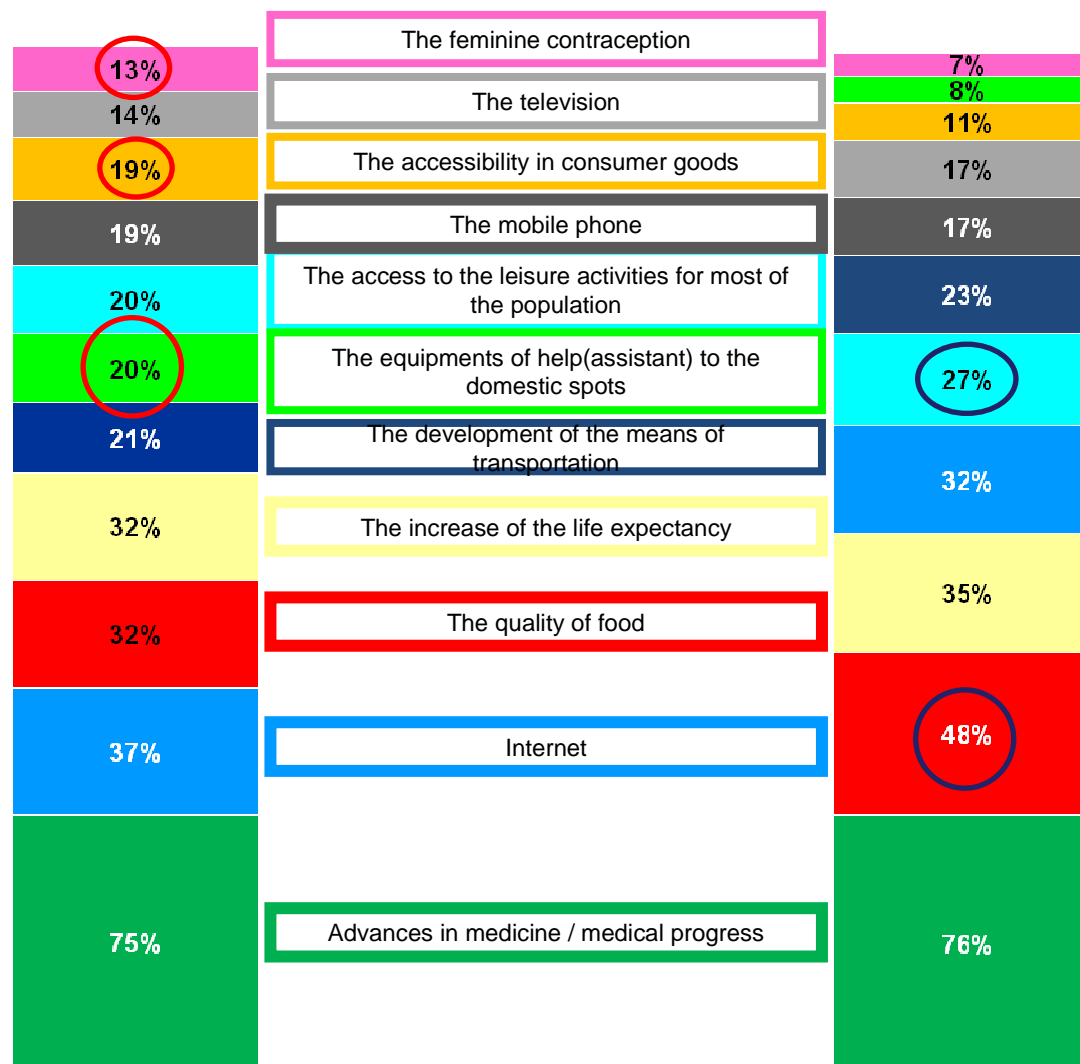
Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



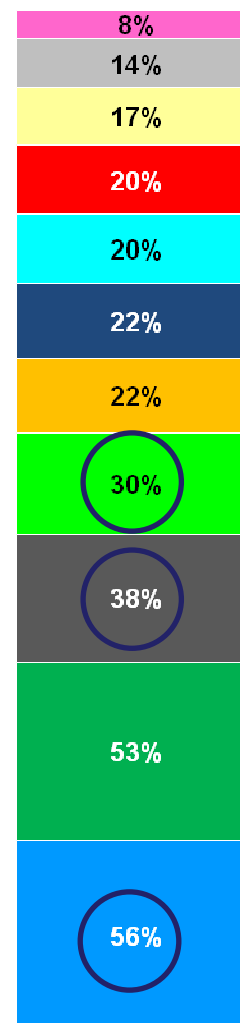
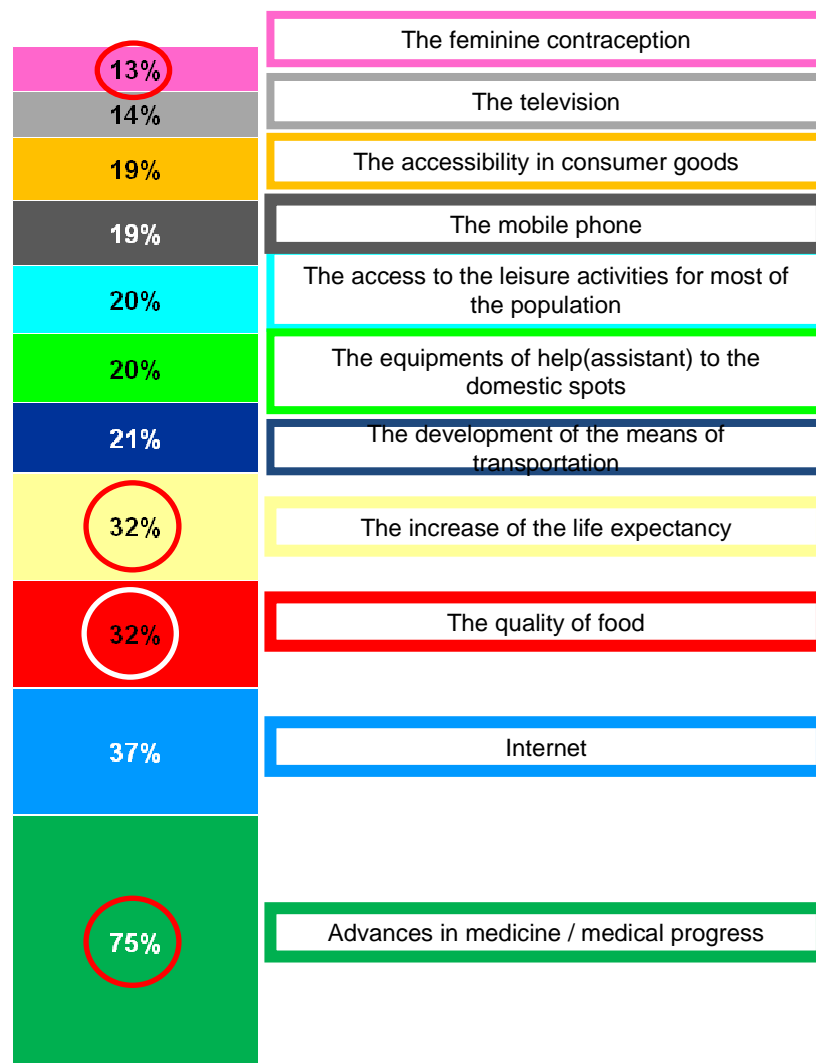
UK



Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



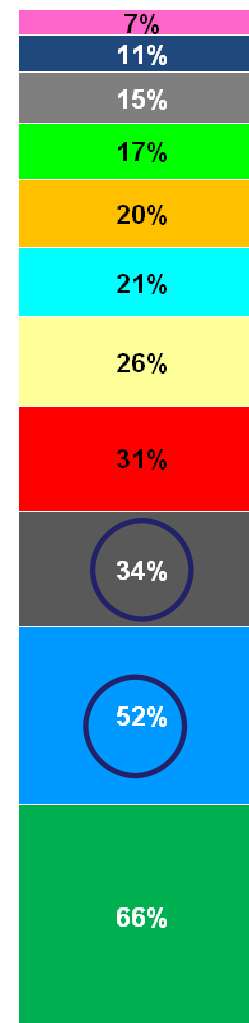
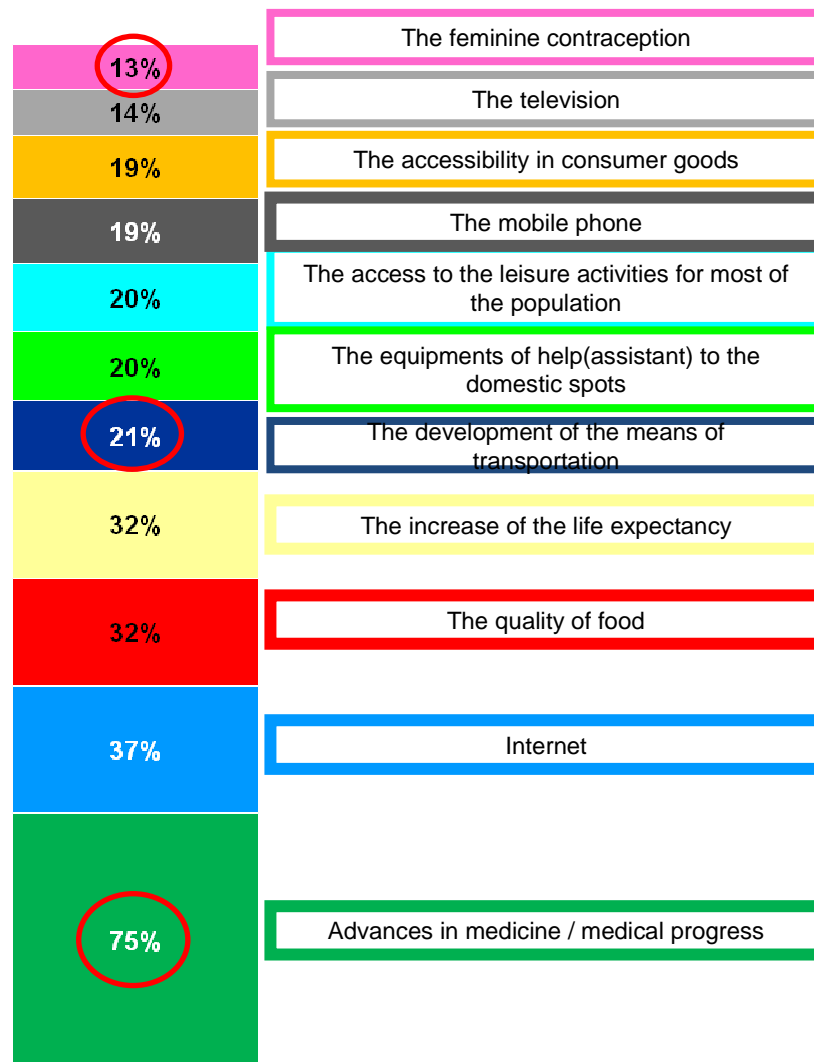
Poland



Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



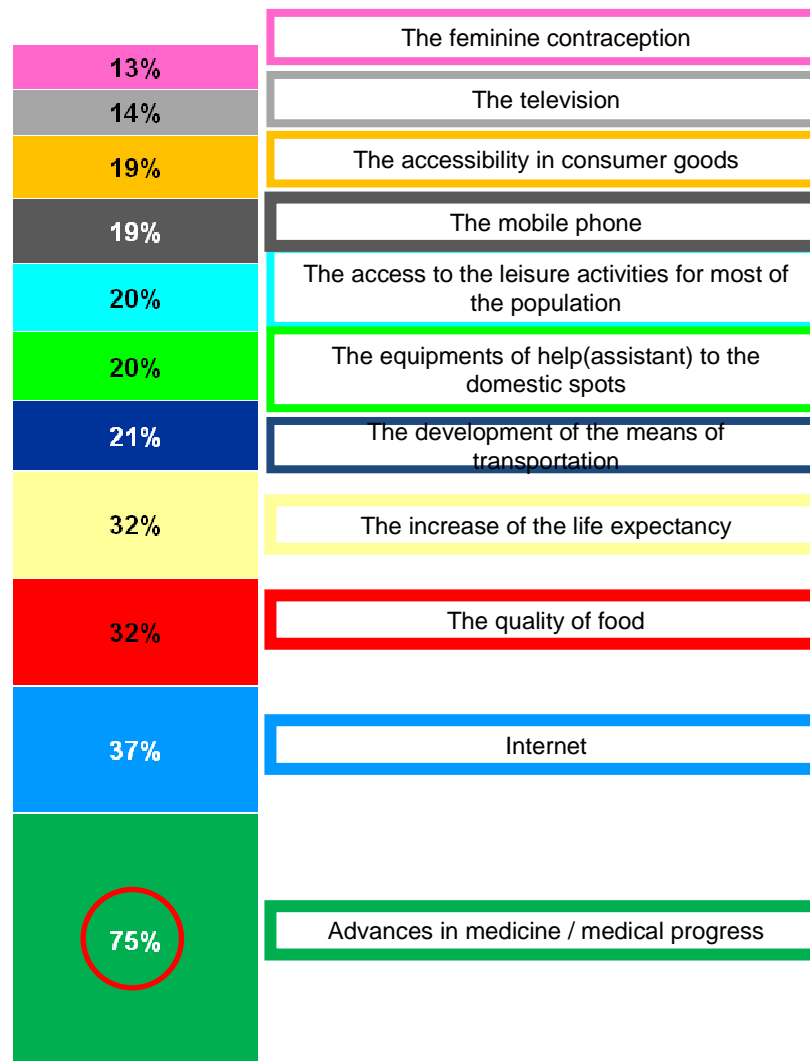
Czech Republic



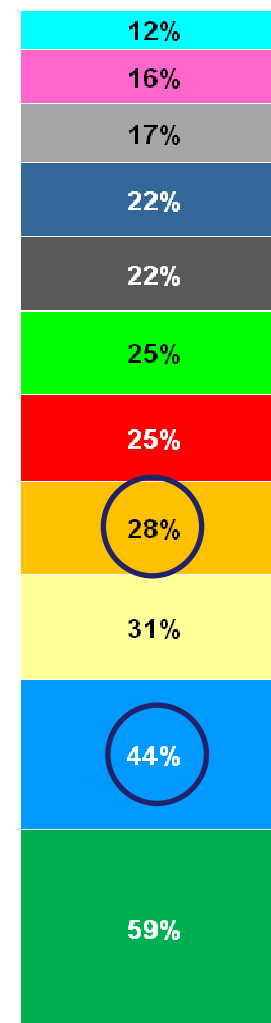
Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



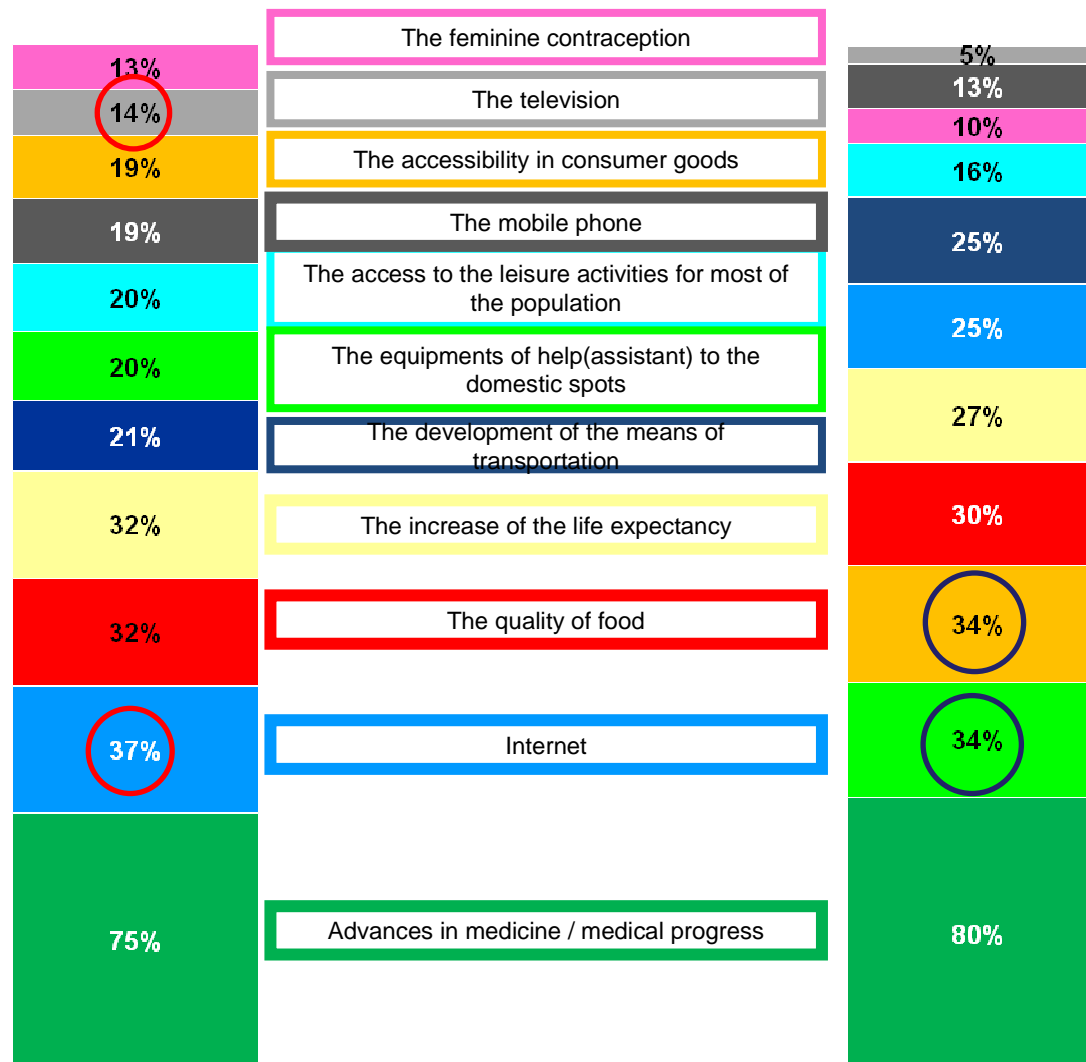
Germany



Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



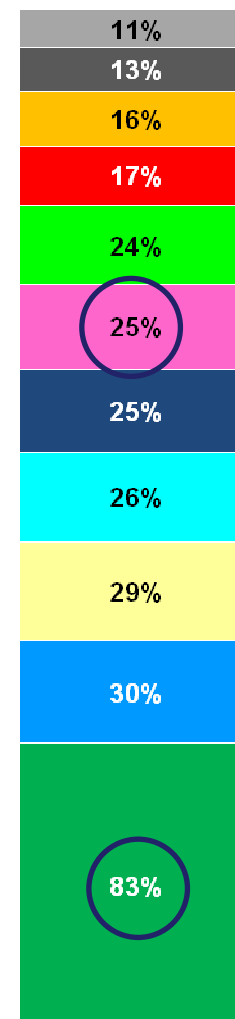
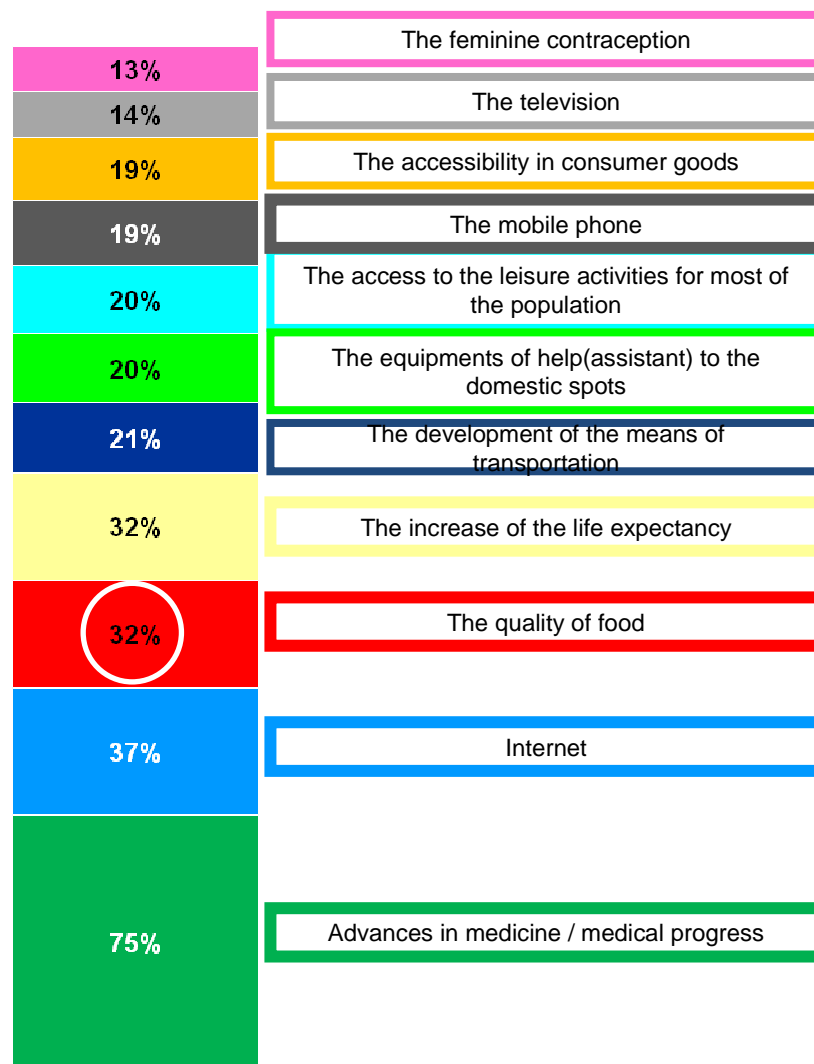
Austria



Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



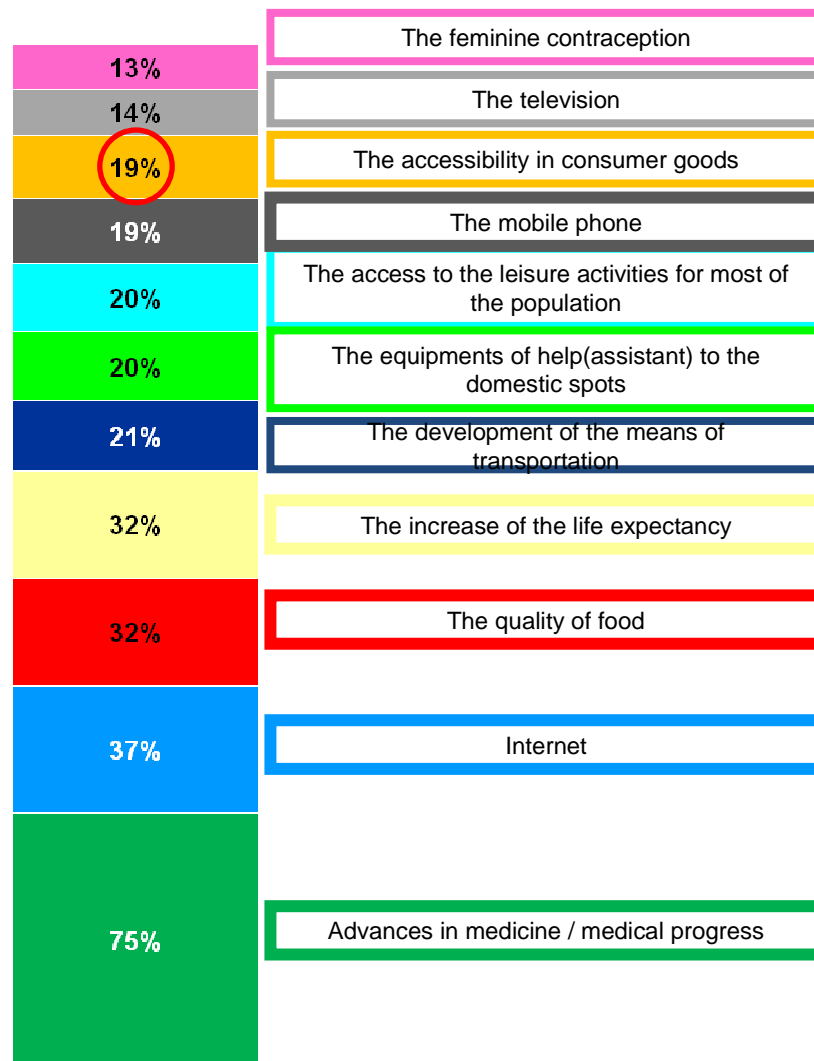
France



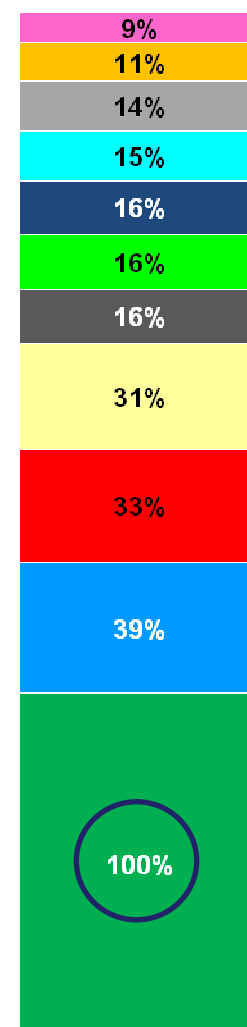
Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



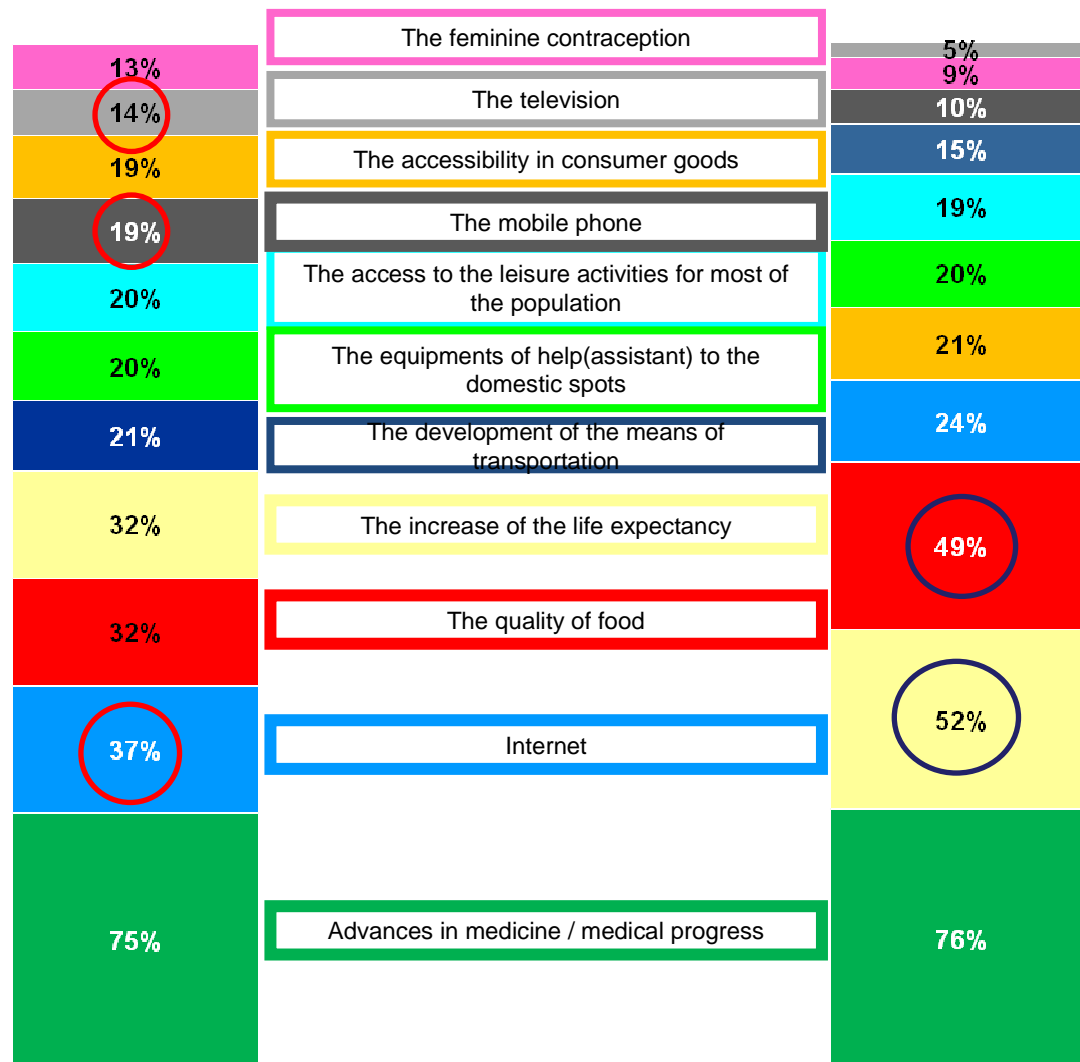
Italy



Reading instruction :
3 possible answers
In %

Which elements have played the biggest role to improving your well-being ?

Europe



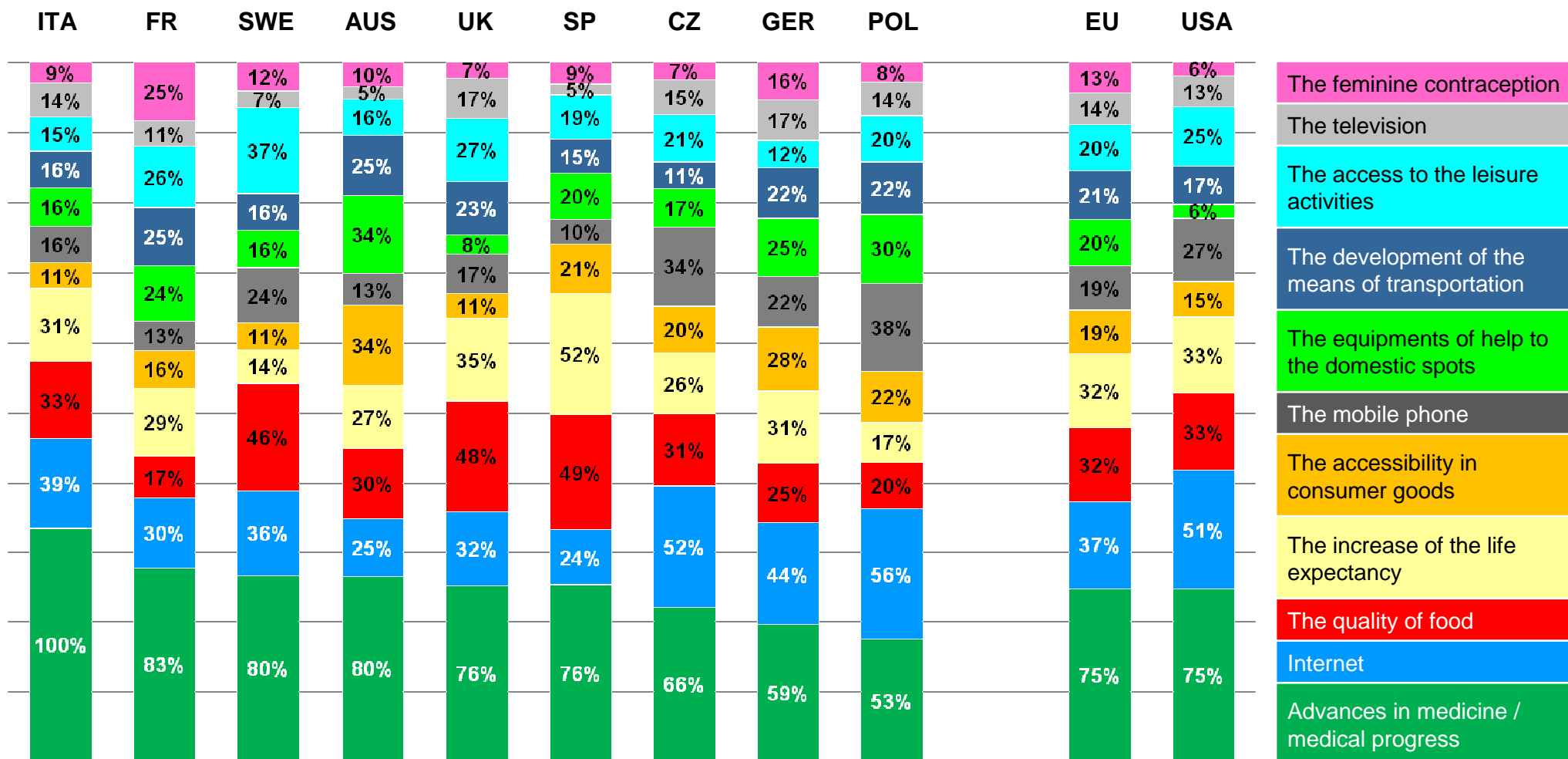
Spain



Reading instruction :
3 possible answers
In %

Summary of drivers of improved well-being in last few decades: details

For you, which elements have played the biggest role to improving your well-being over the last few decades?
(3 possible answers)



Healthcare and social requirements

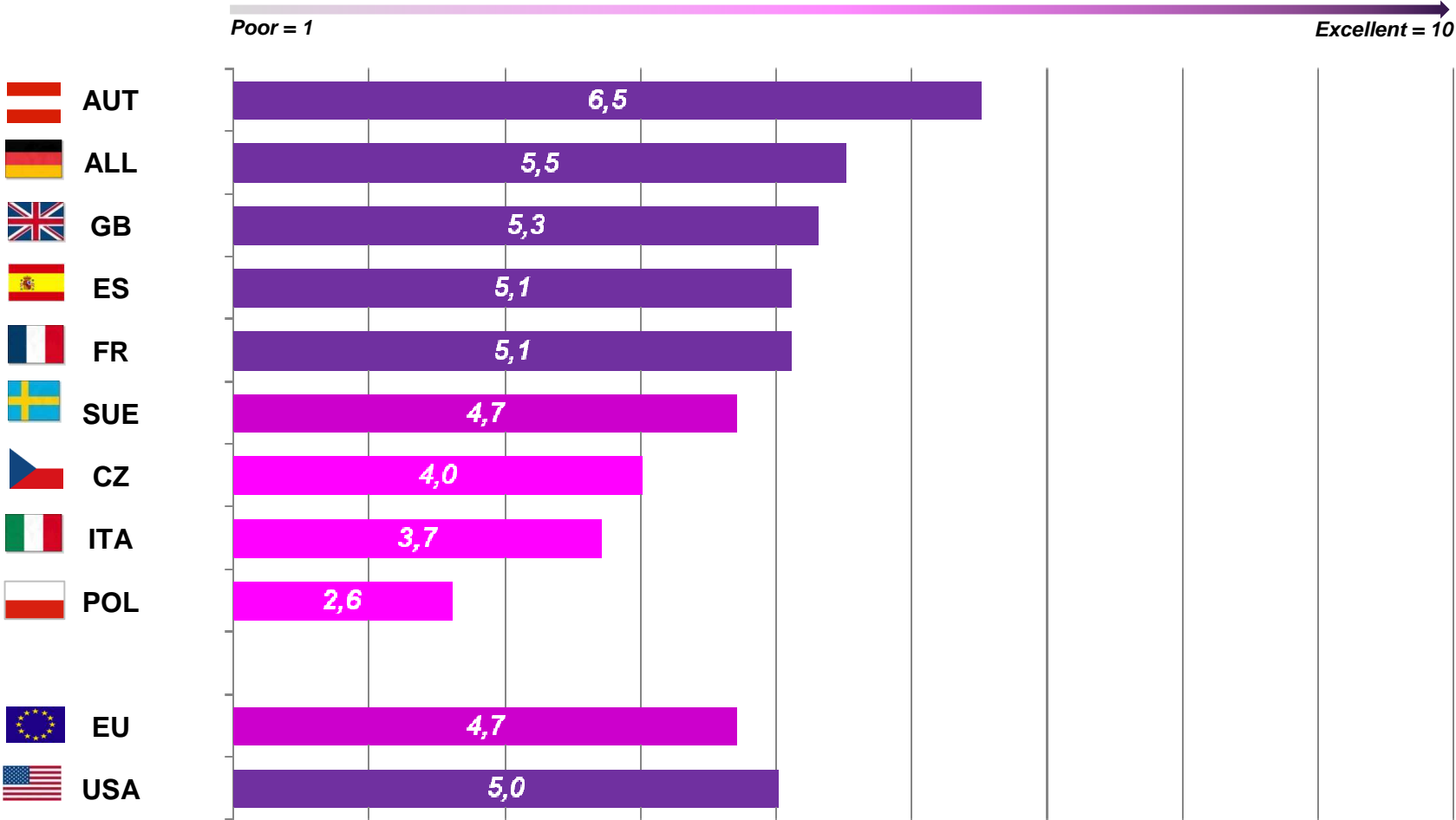


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How would you evaluate the organization of the health system today?

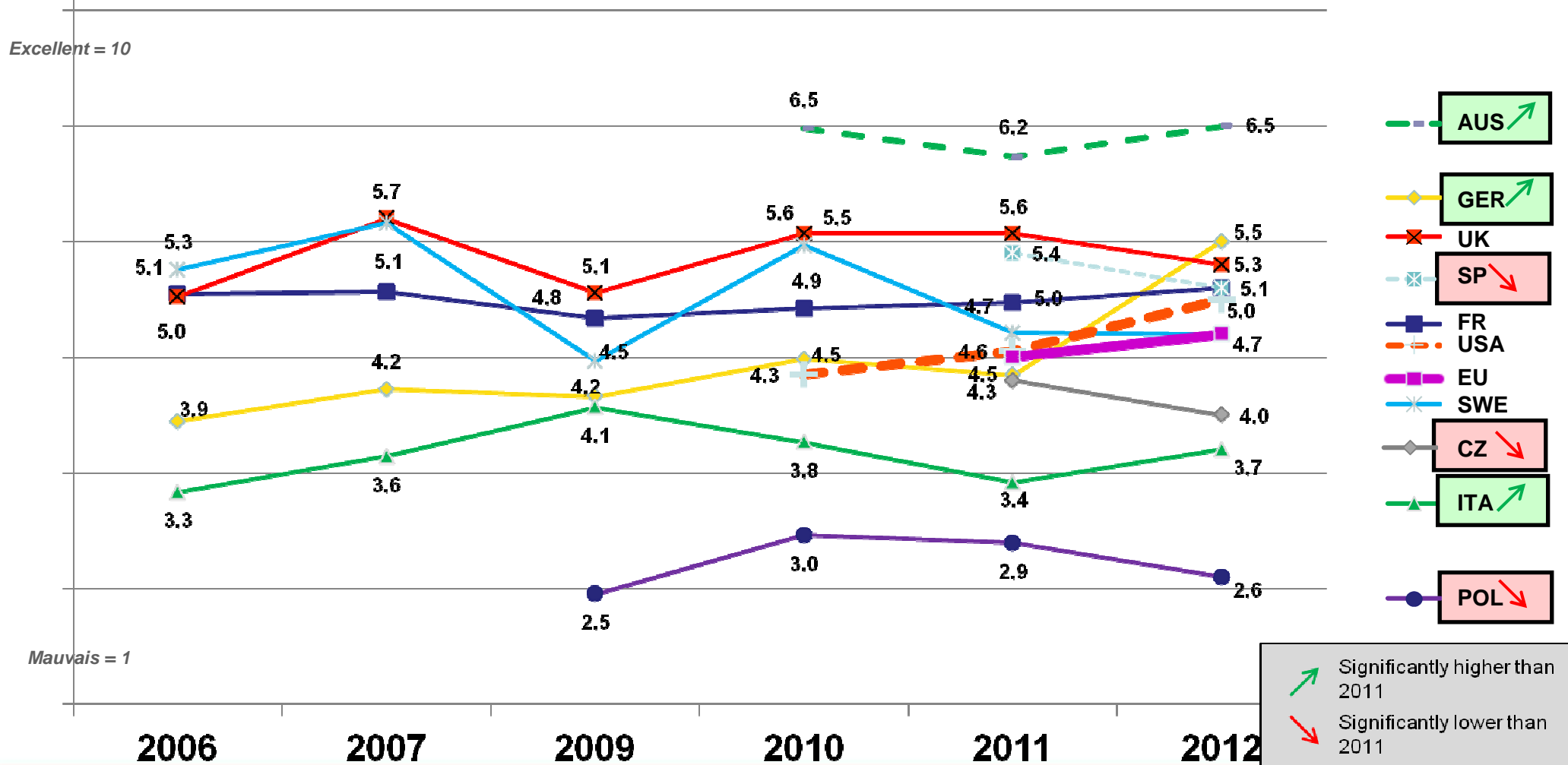
Score calculated with following values : poor =1, average= 3,25, good = 5.5, very good = 7.75, Excellent = 10



Opinion of health system organization – Evolution 2006-2012

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



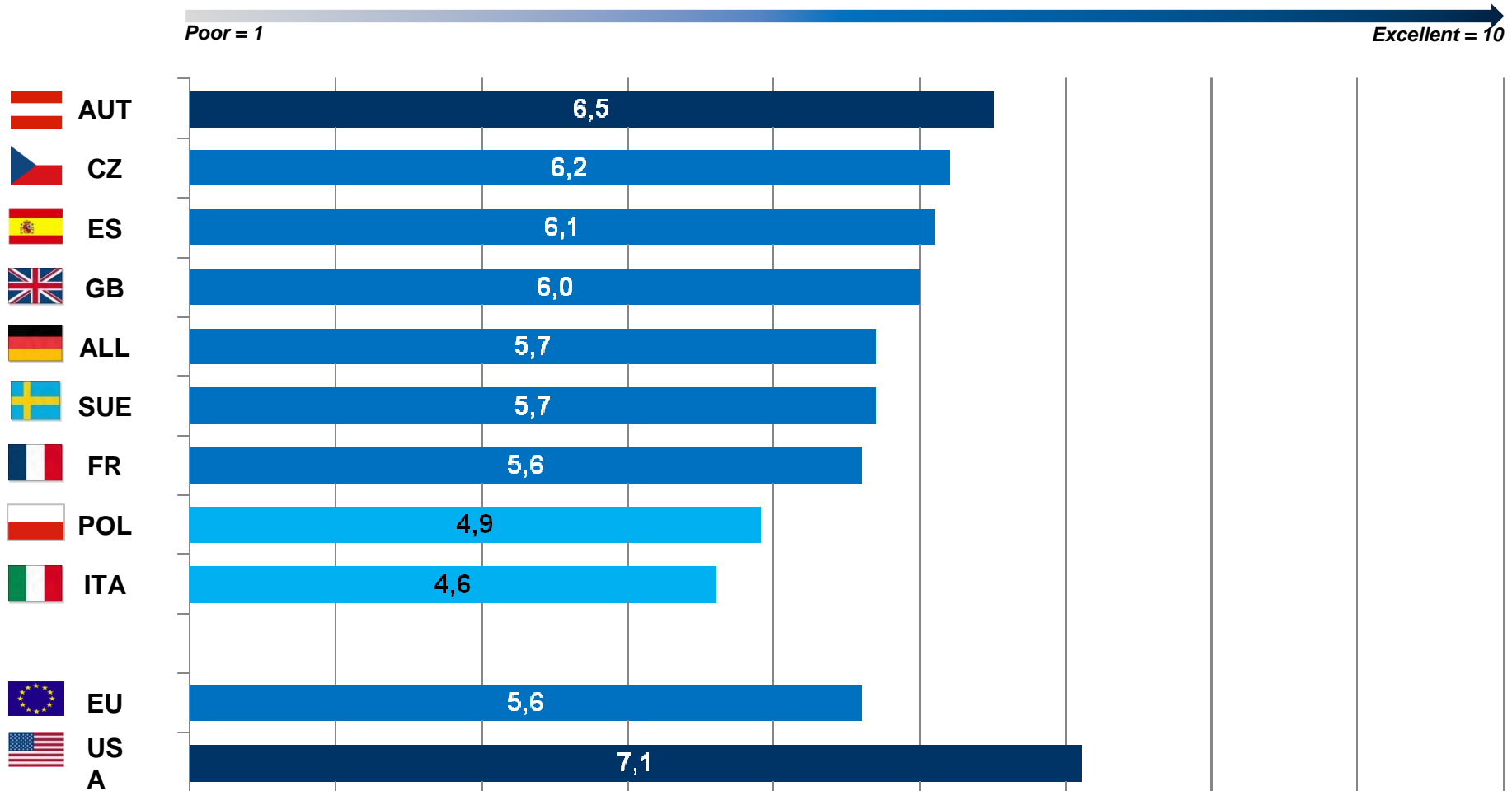
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Opinion of doctor's technical skills

How do you rate doctor's technical skills for diagnosis and treatments?

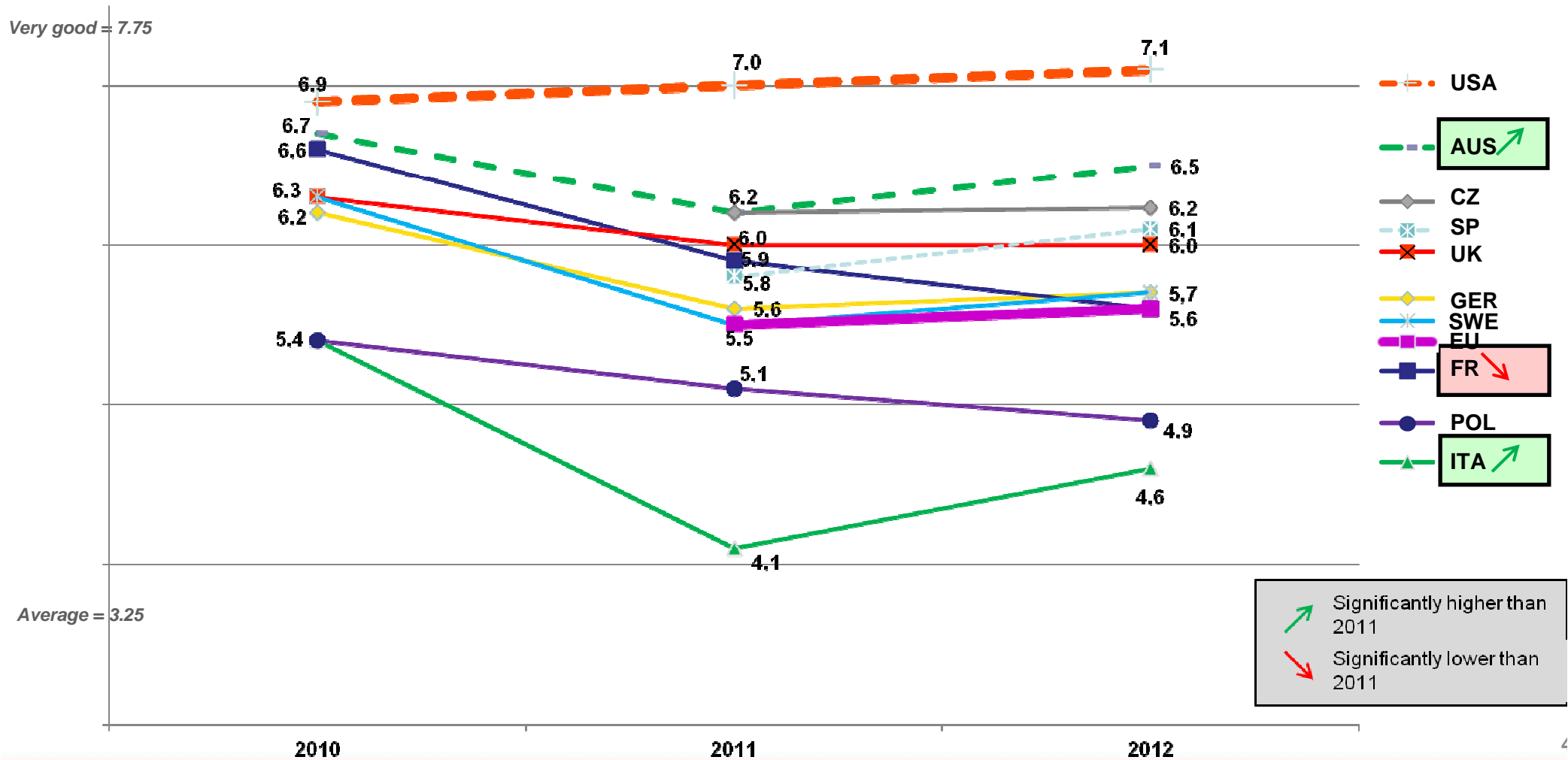
Score calculated with following values : poor =1, average= 3,25, good = 5.5, very good = 7.75, Excellent = 10



Evaluation of doctor's technical skills : evolution 2010-2012

How do you rate doctor's technical skills for diagnosis and treatments?

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

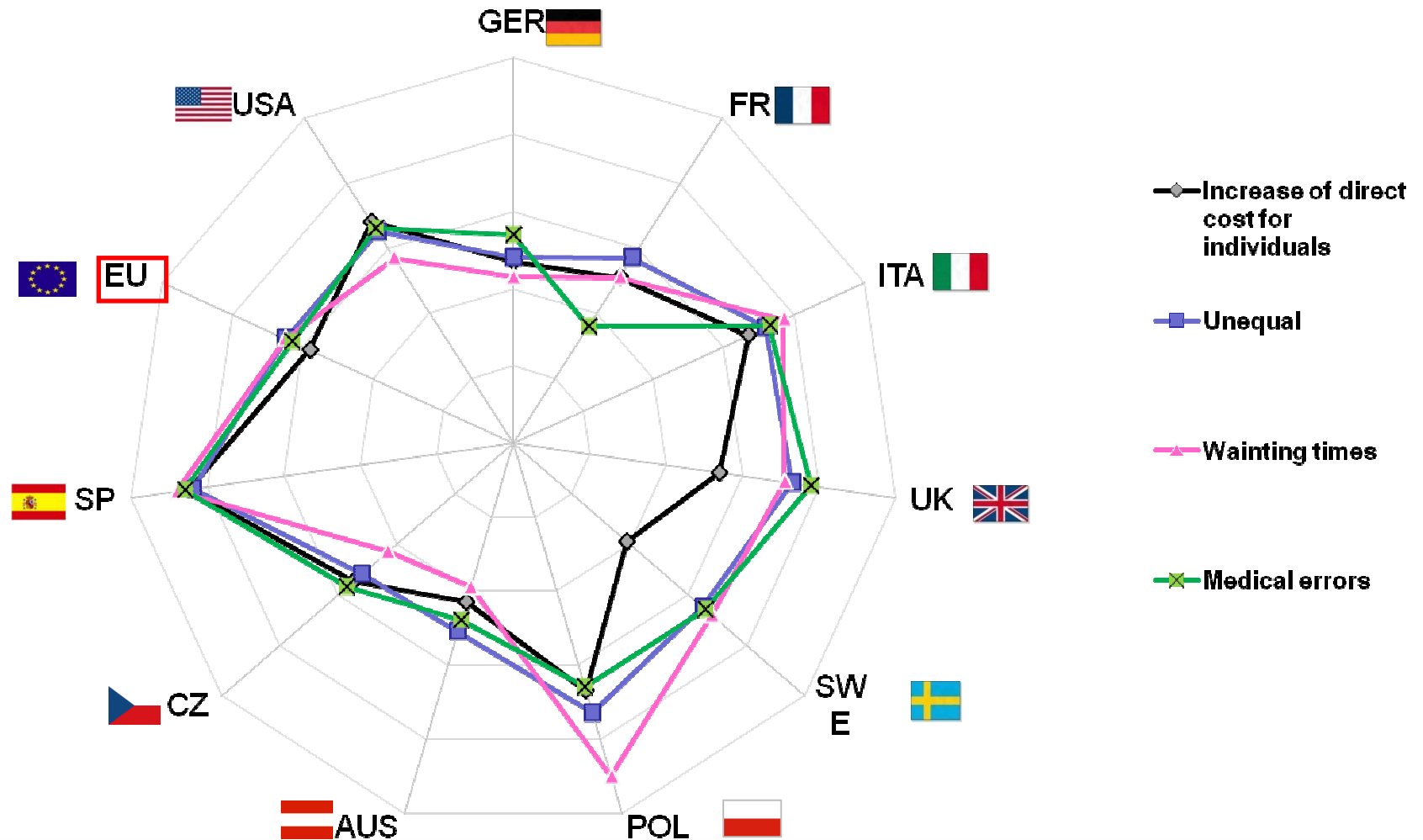


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Perceived threats to the future of health systems

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?



Reading instruction:
 % of respondents answering
 « very important »
 Each radian is equivalent to 20%
 of response

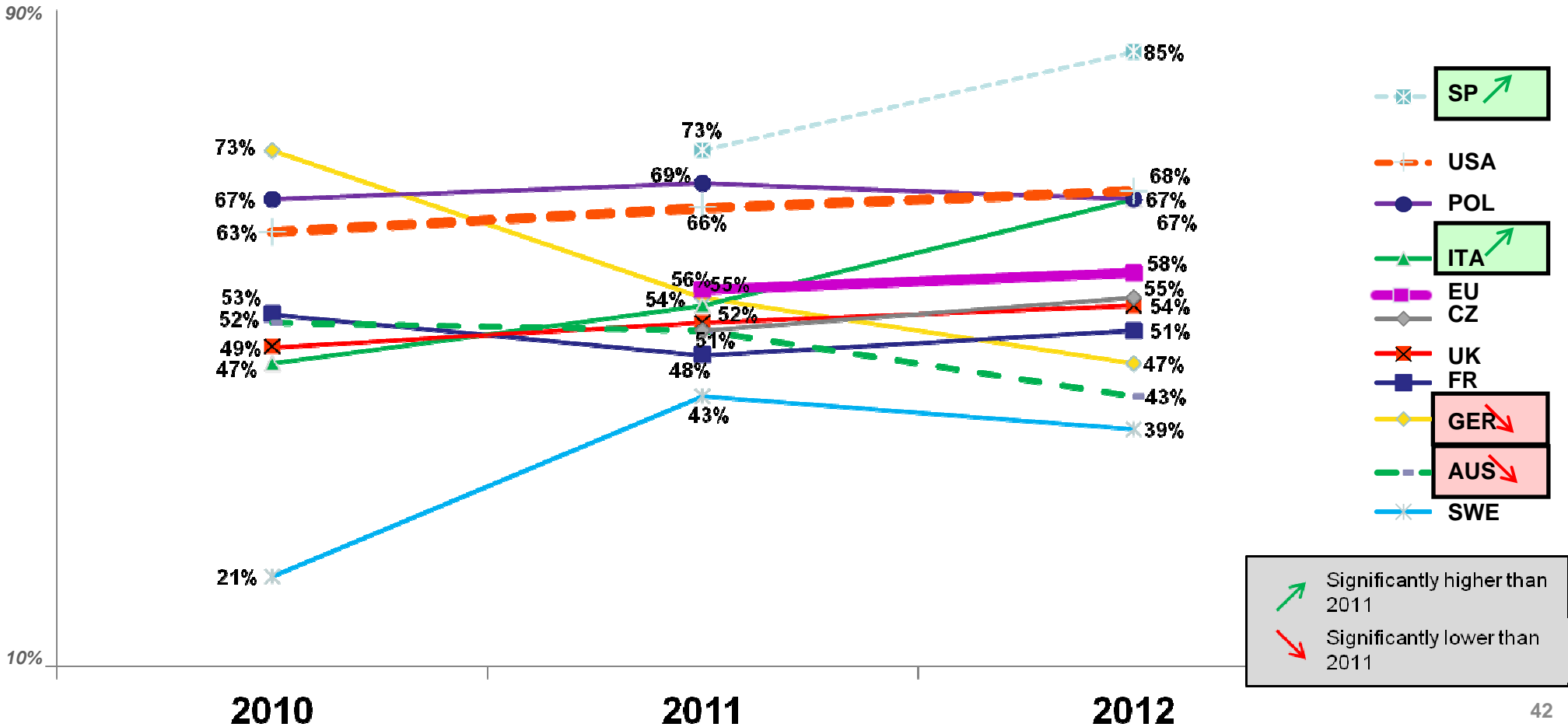


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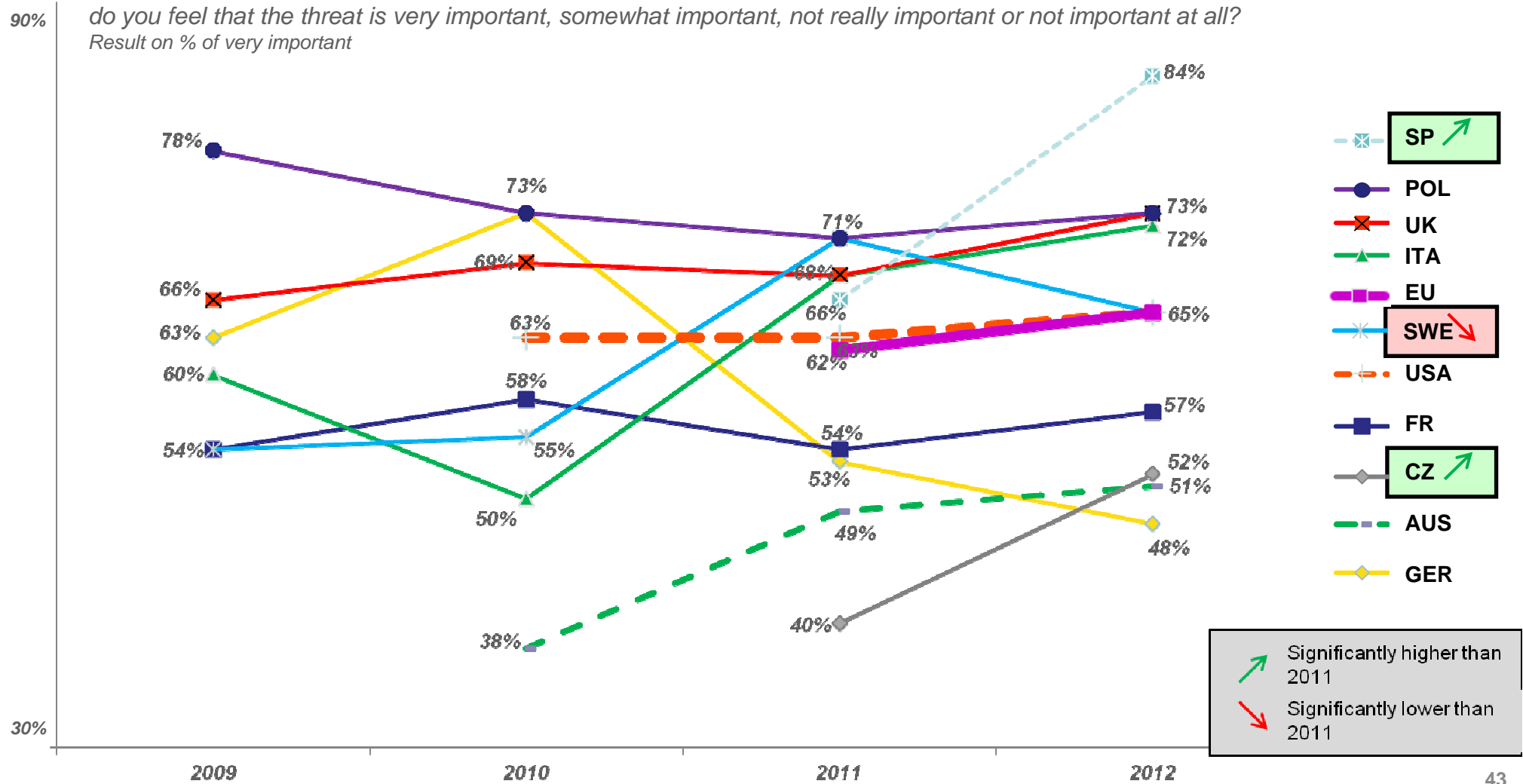
Increase of direct cost for individuals :

do you feel that the threat is very important, somewhat important, not really important or not important at all?
Result on % of very important



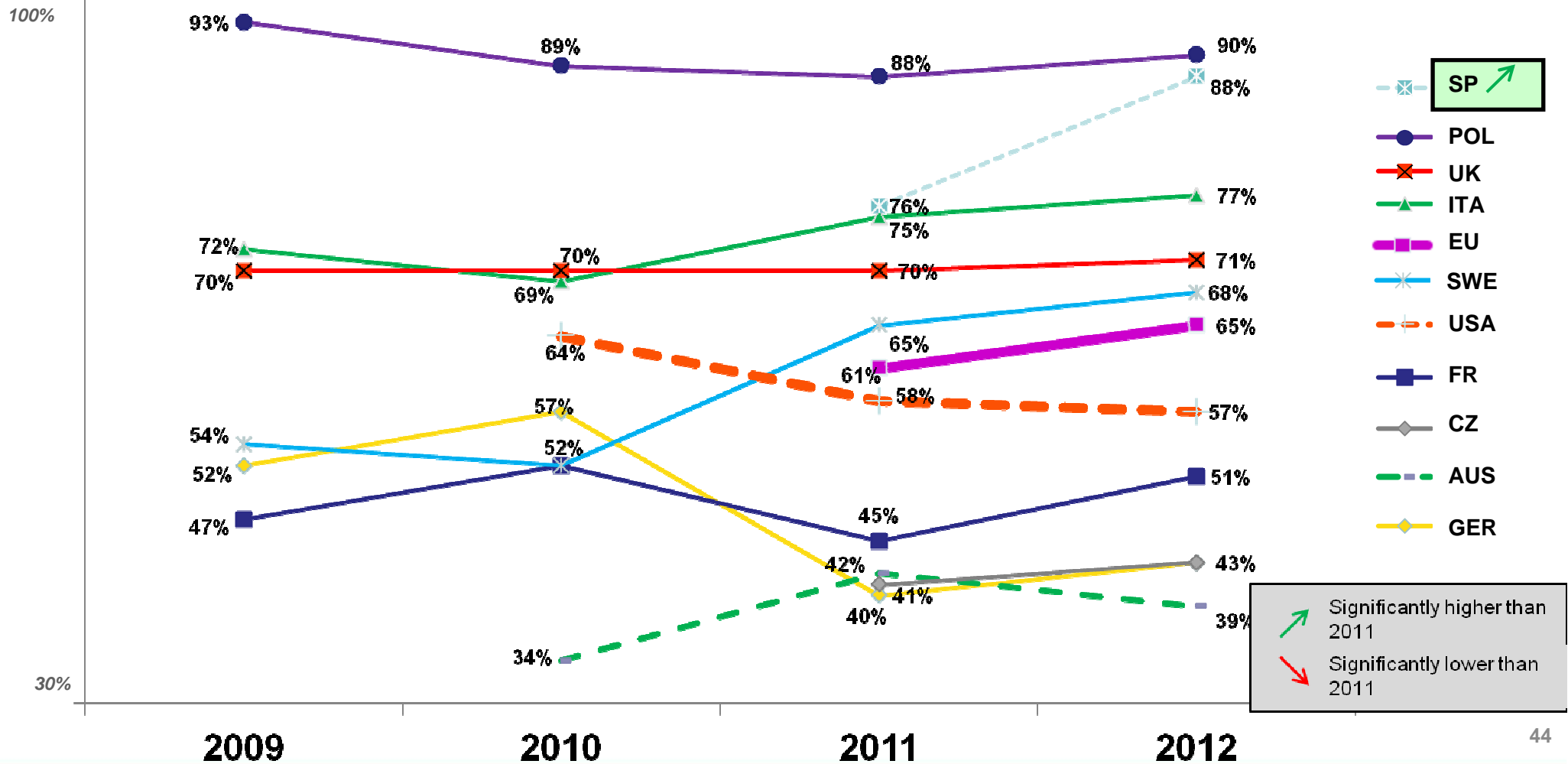
Significantly higher than 2011
 Significantly lower than 2011

Unequal access to health care

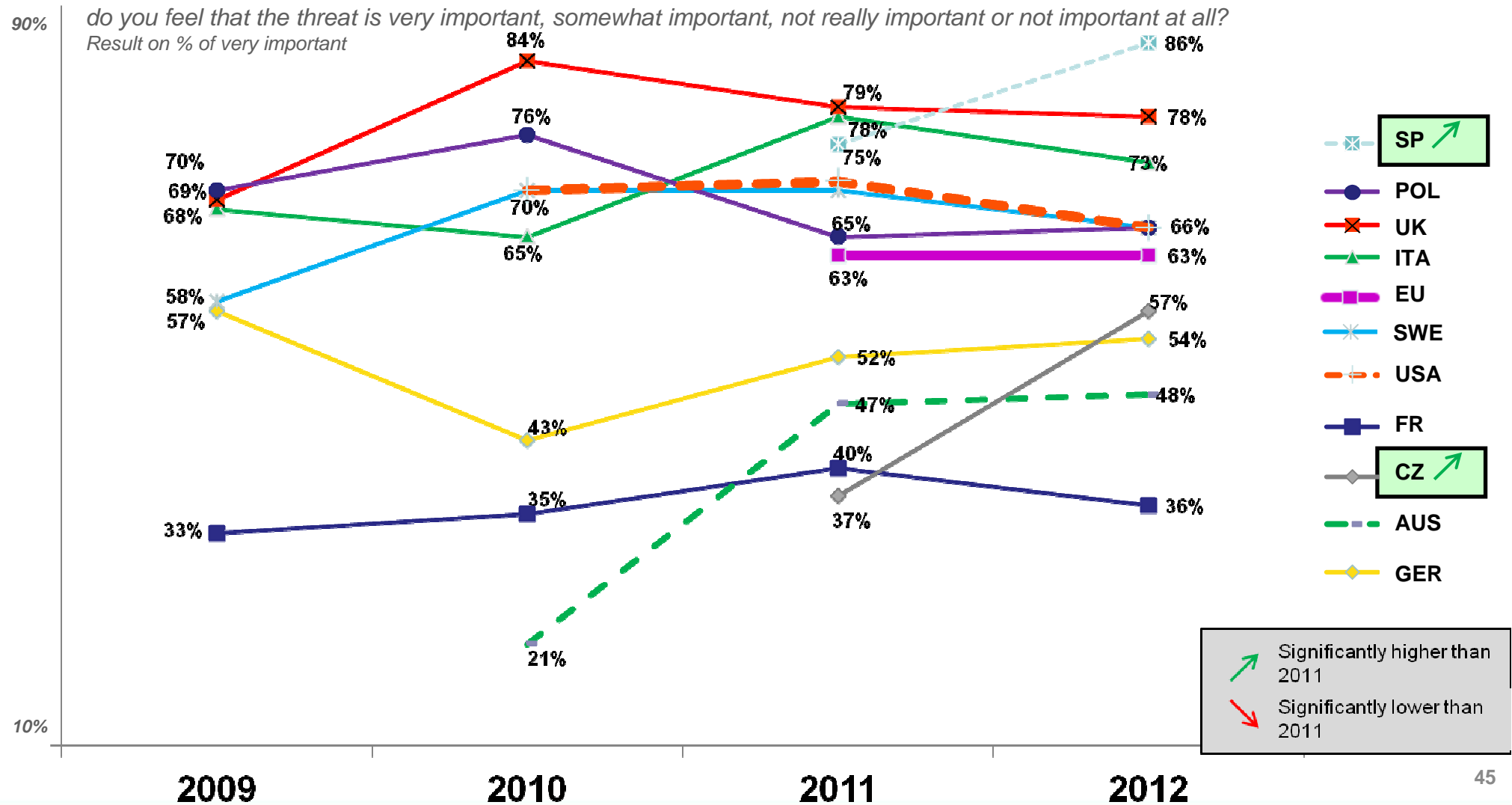


Waiting times before receiving treatment :

do you feel that the threat is very important, somewhat important, not really important or not important at all?
Result on % of very important

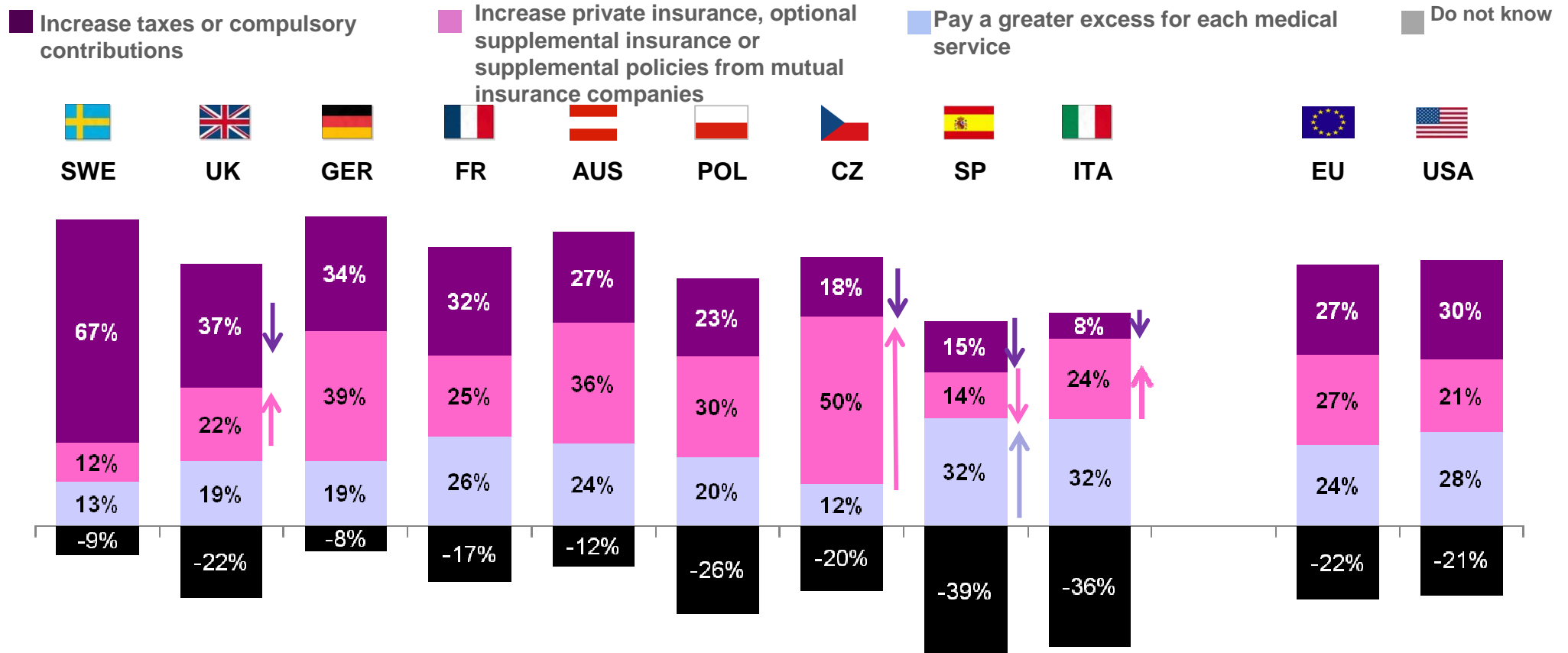


Medical errors :



New funding sources for future

What do you think is the best solution to cover increases in health care costs?



In 2012/2011: public opinion evolves in favor of private optional insurances at the expense of additional taxes or compulsory contributions in Italy, Great Britain and in the Czech Republic.
In Spain, public opinion strongly shifts to a franchise for medical acts instead of compulsory or optional contributions.

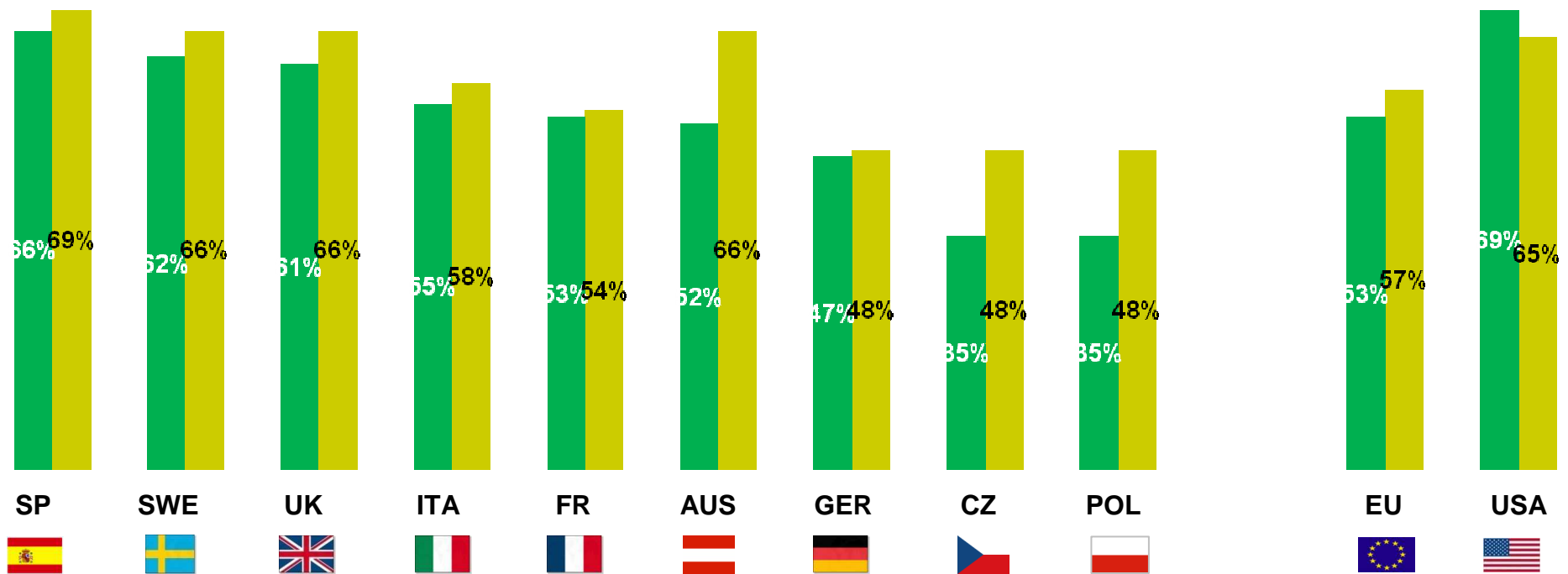
Medicines and trust in control mechanisms

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

 to taking medicines?

 to the use of medical devices such as prostheses, probes, endoscopes?

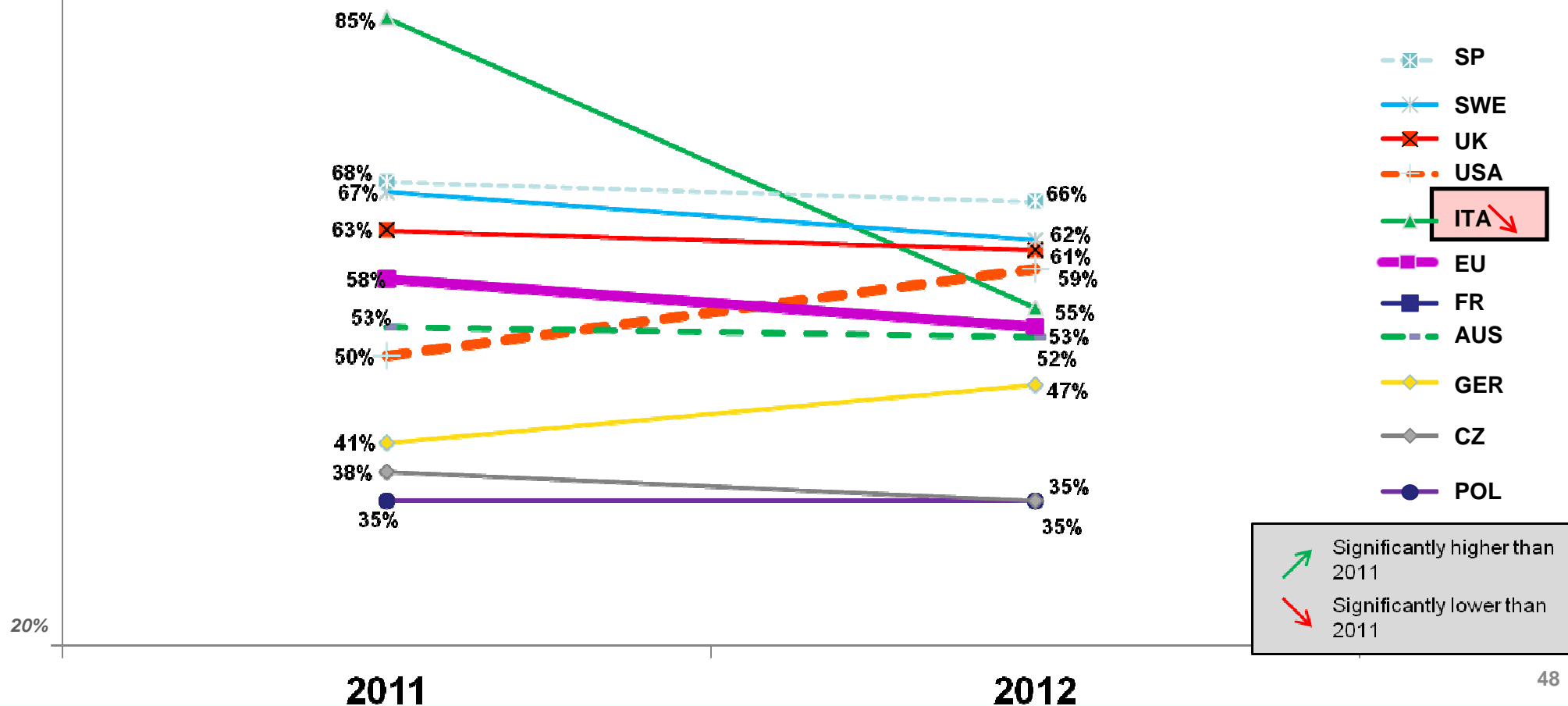
Results on % of yes



Trust in control mechanisms – Evolution 2011-2012

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

Evolution of % of yes



Significantly higher than 2011
 Significantly lower than 2011

Social requirements



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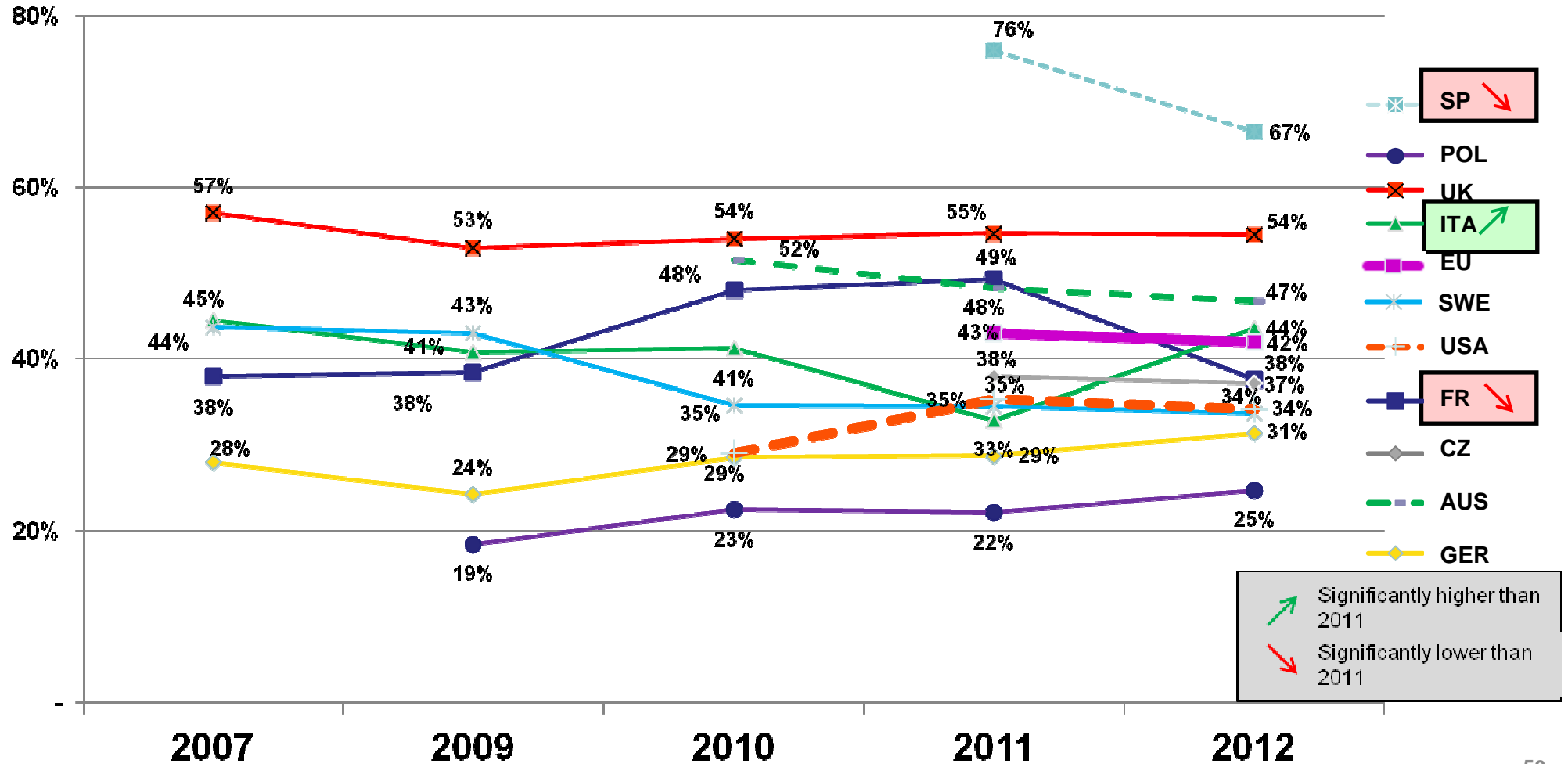


Evaluation of equality in access to medical care - Evolution

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

Evolution since 2007 of equality in access to medical care

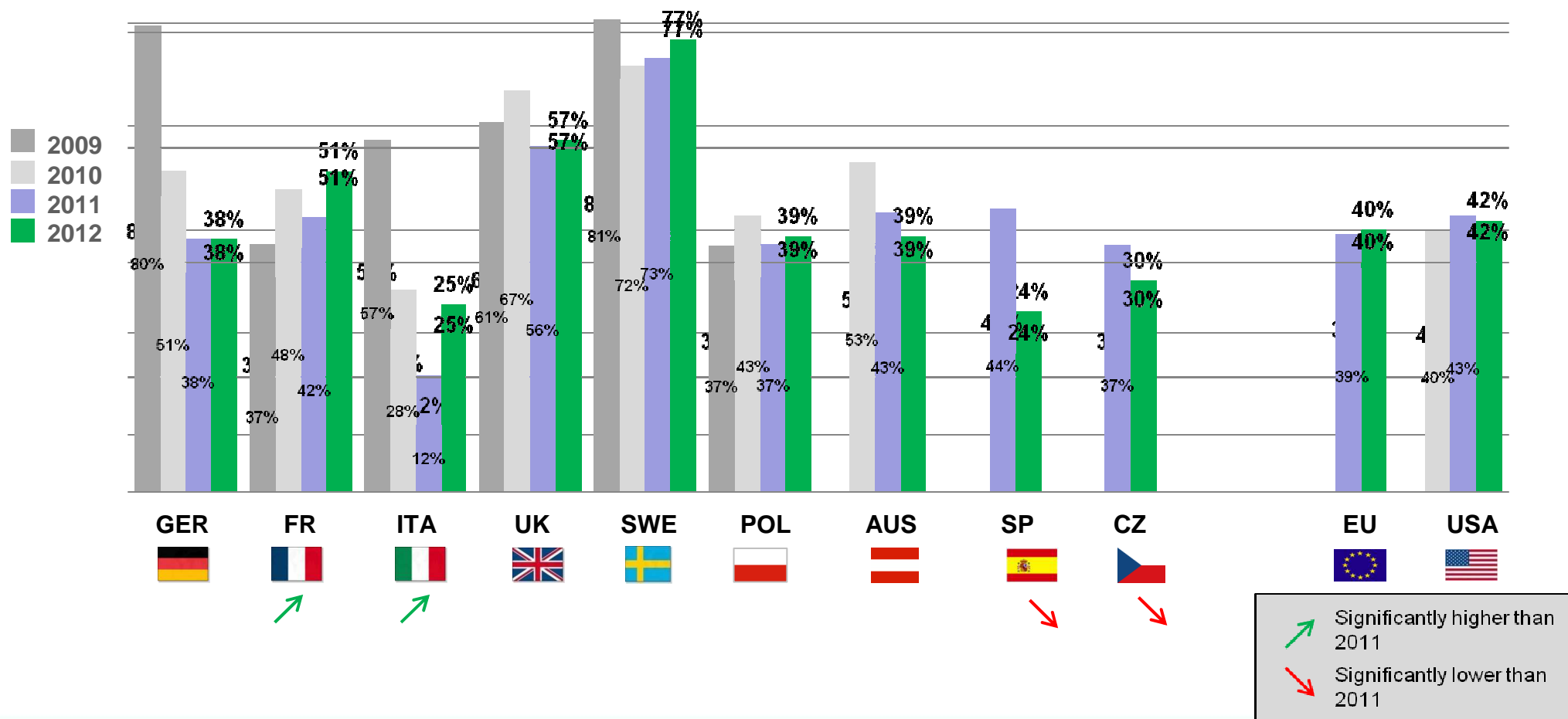
(% of yes)



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?

Evolution between 2009 and 2012 on % of « yes »



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Health care decline



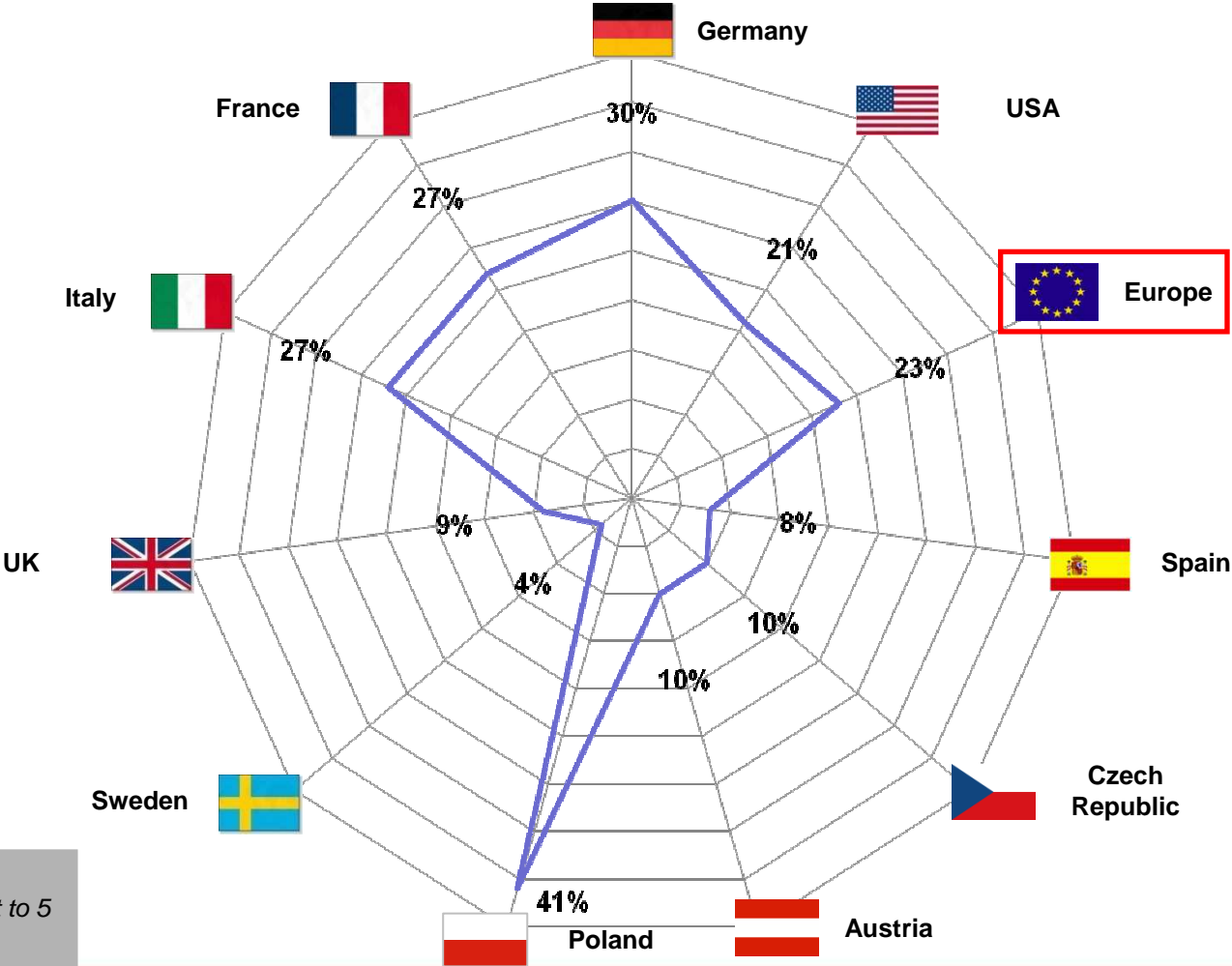
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Health care decline: spontaneous

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?

On % of yes



Reading Instruction:
Each radian is equivalent to 5 % of response

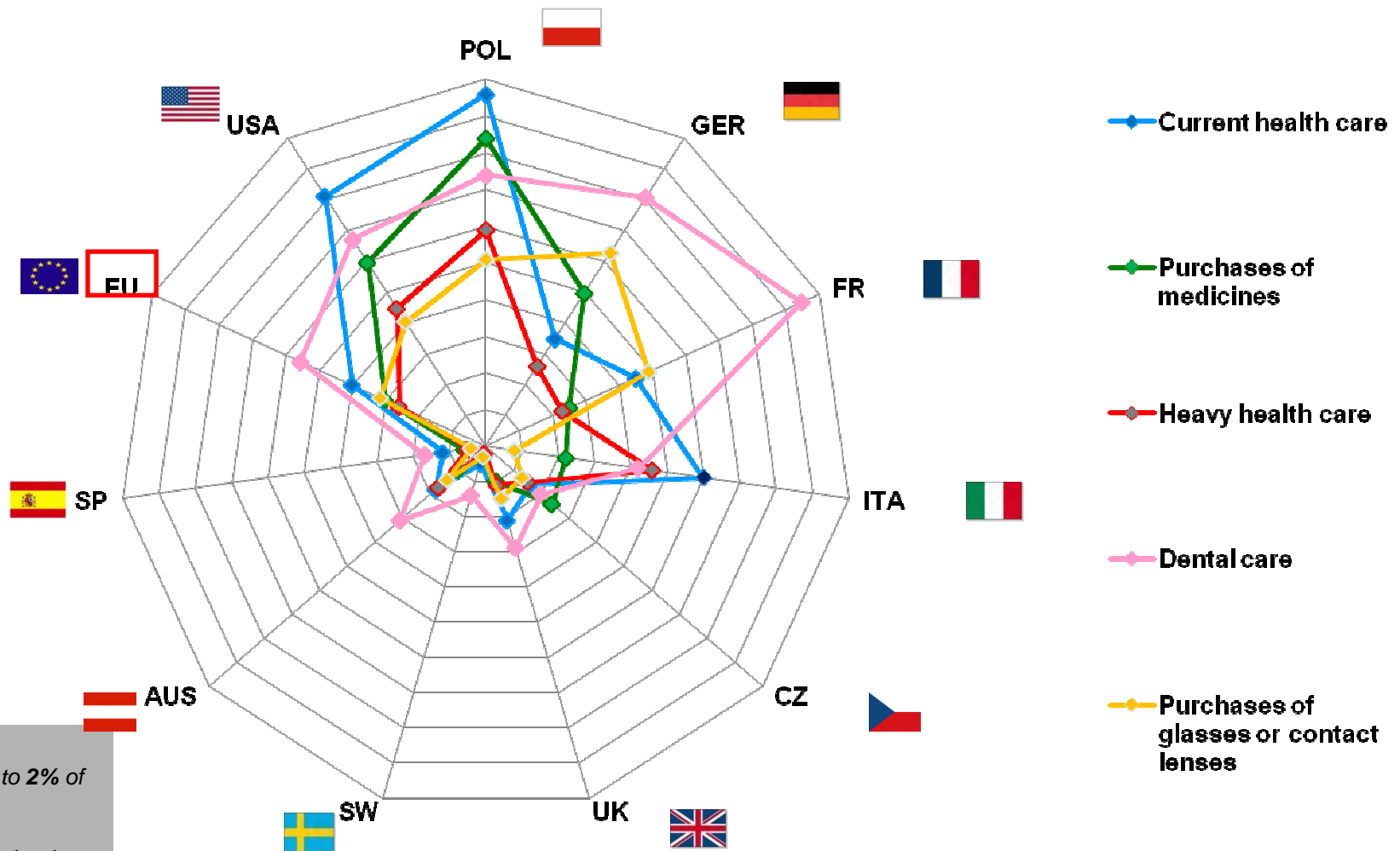


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Health care decline : care concerned

What type of care did you decline or delay for yourself or a member of your household because of financial difficulties?



Reading instruction:
 Each radian is equivalent to 2% of response
 Spontaneous answers
 Multiple response was admitted



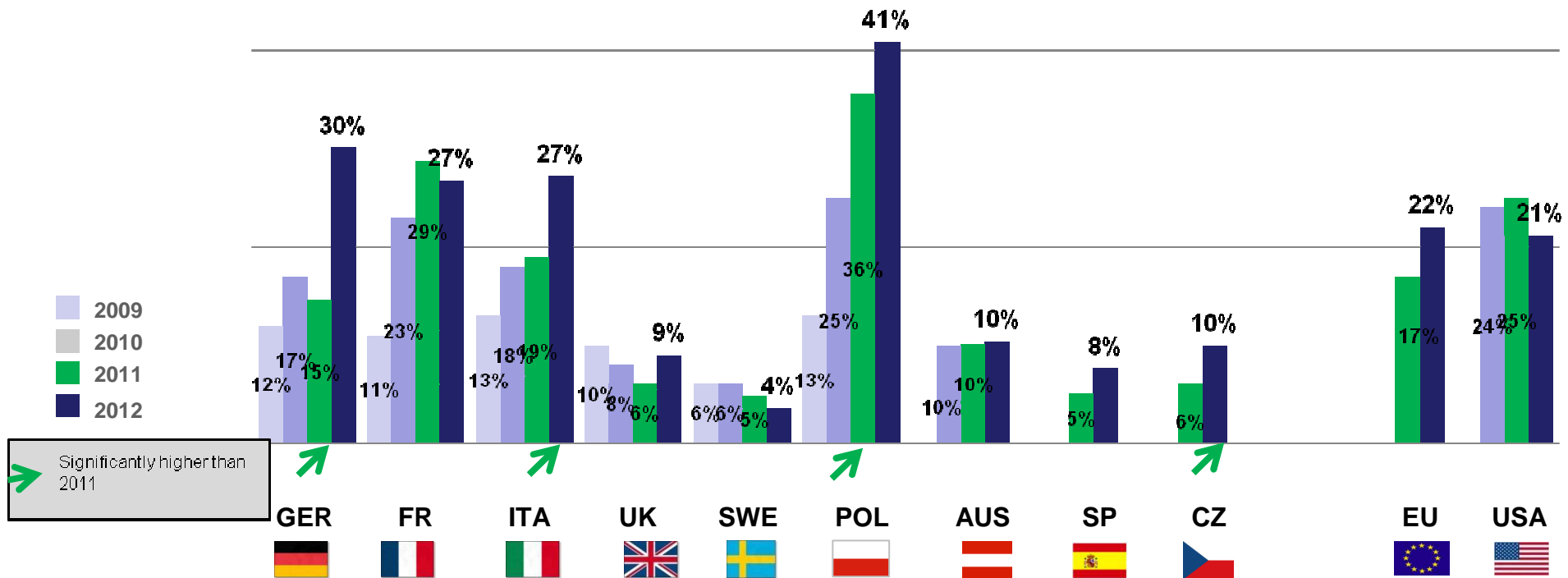
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Evolution of health care decline

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?

Evolution between 2009 and 2012 on % of « yes »



➔ Significantly higher than 2011

Evolution 2012/2011 of the **average number of medical acts**: routine care, heavy health care or purchase of drugs among respondents who have renounced or postponed care.

2011	0.6	0.8	0.8	0.3	0.6	1.1	0.6	0.6	0.7	0.7	0.3
2012	0.7	0.7	1	0.9	0.5	1.2	0.9	0.6	1.1	0.8	0.9

55

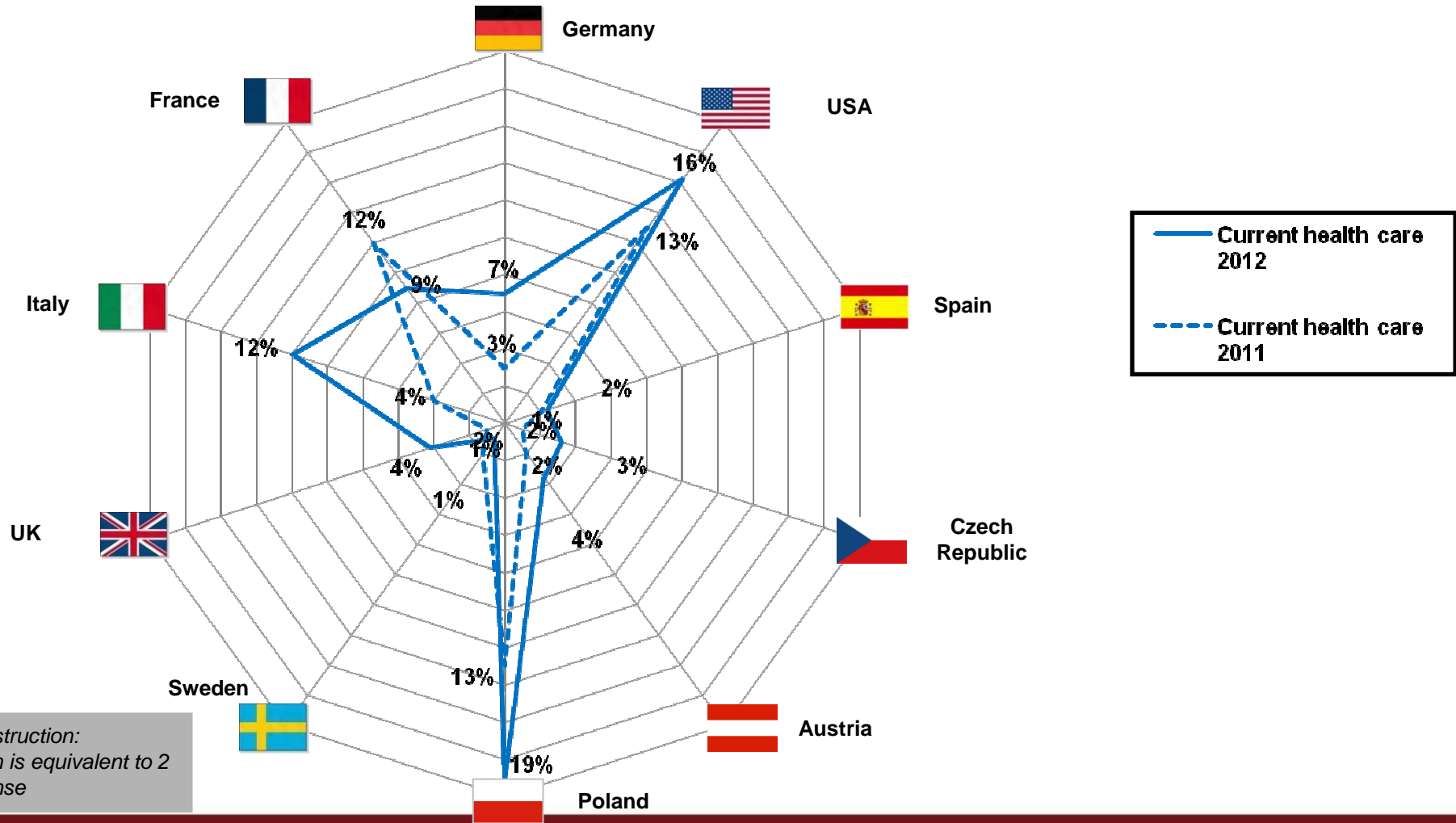


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Decline or delay current health care because of financial difficulties

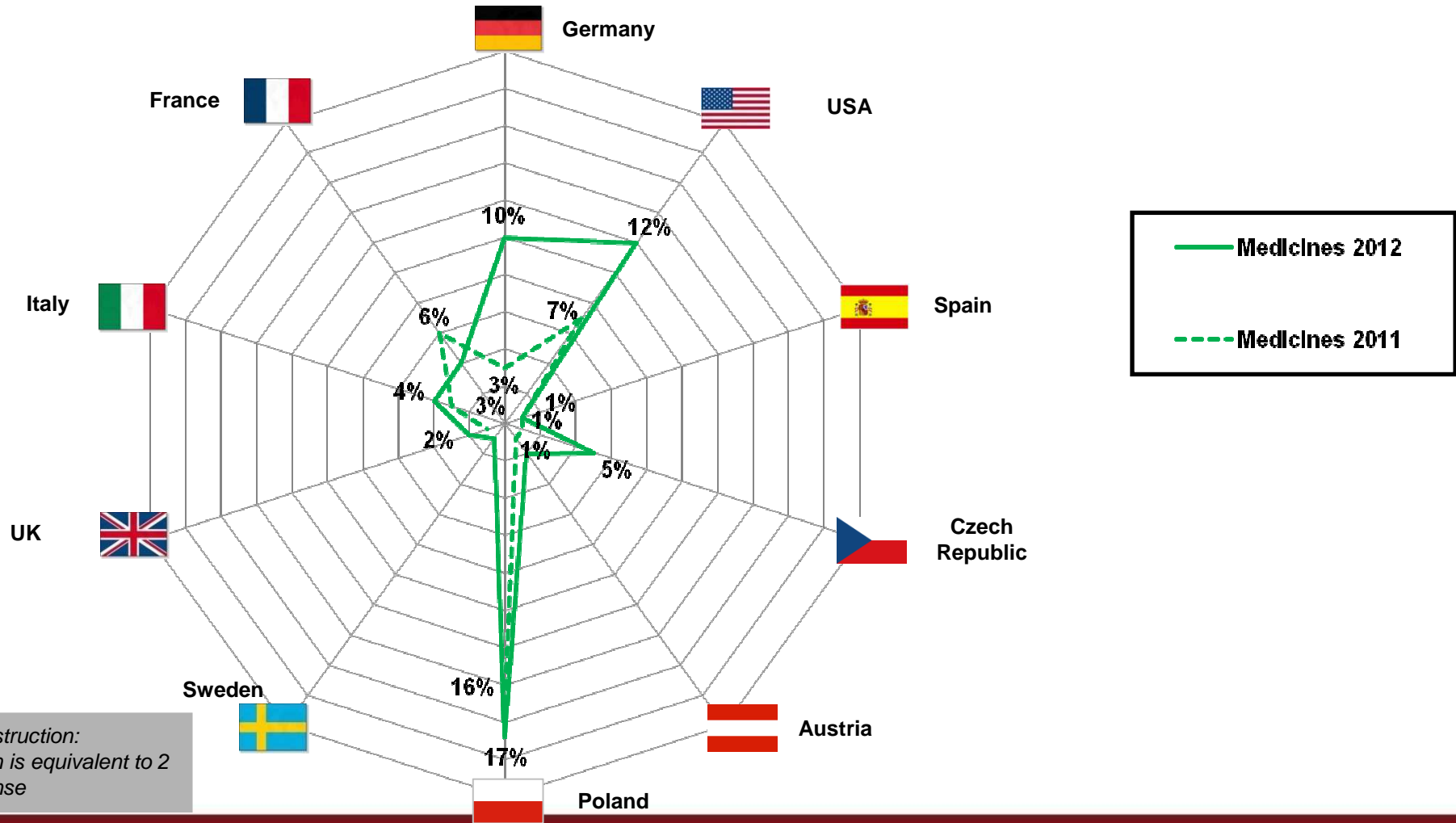
Comparison 2012/2011



Reading Instruction:
Each radian is equivalent to 2 % of response

Decline or delay purchase of medicines because of financial difficulties

Comparison 2012/2011

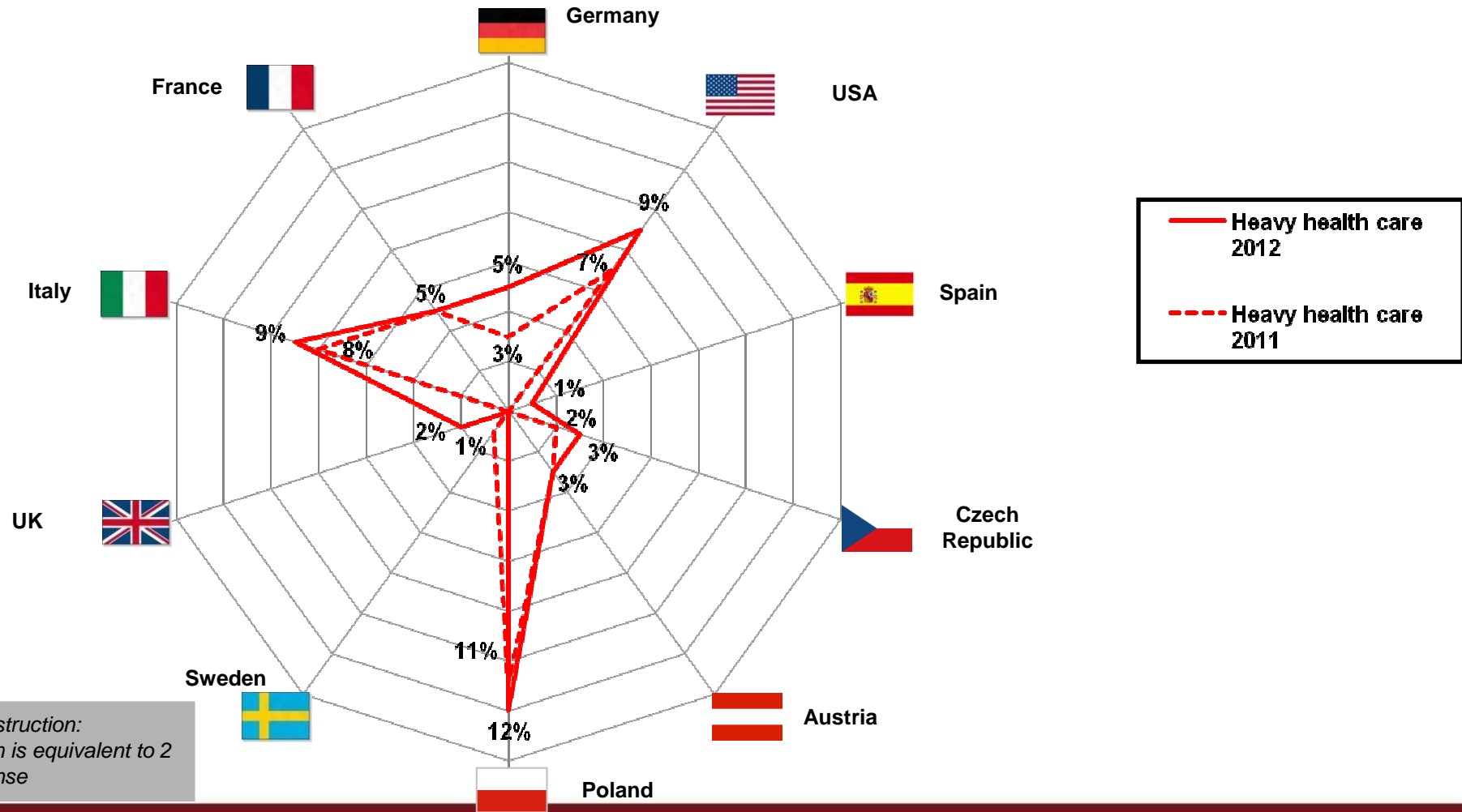


Reading Instruction:
Each radian is equivalent to 2 % of response

Health care decline – Heavy health care – Evolutions

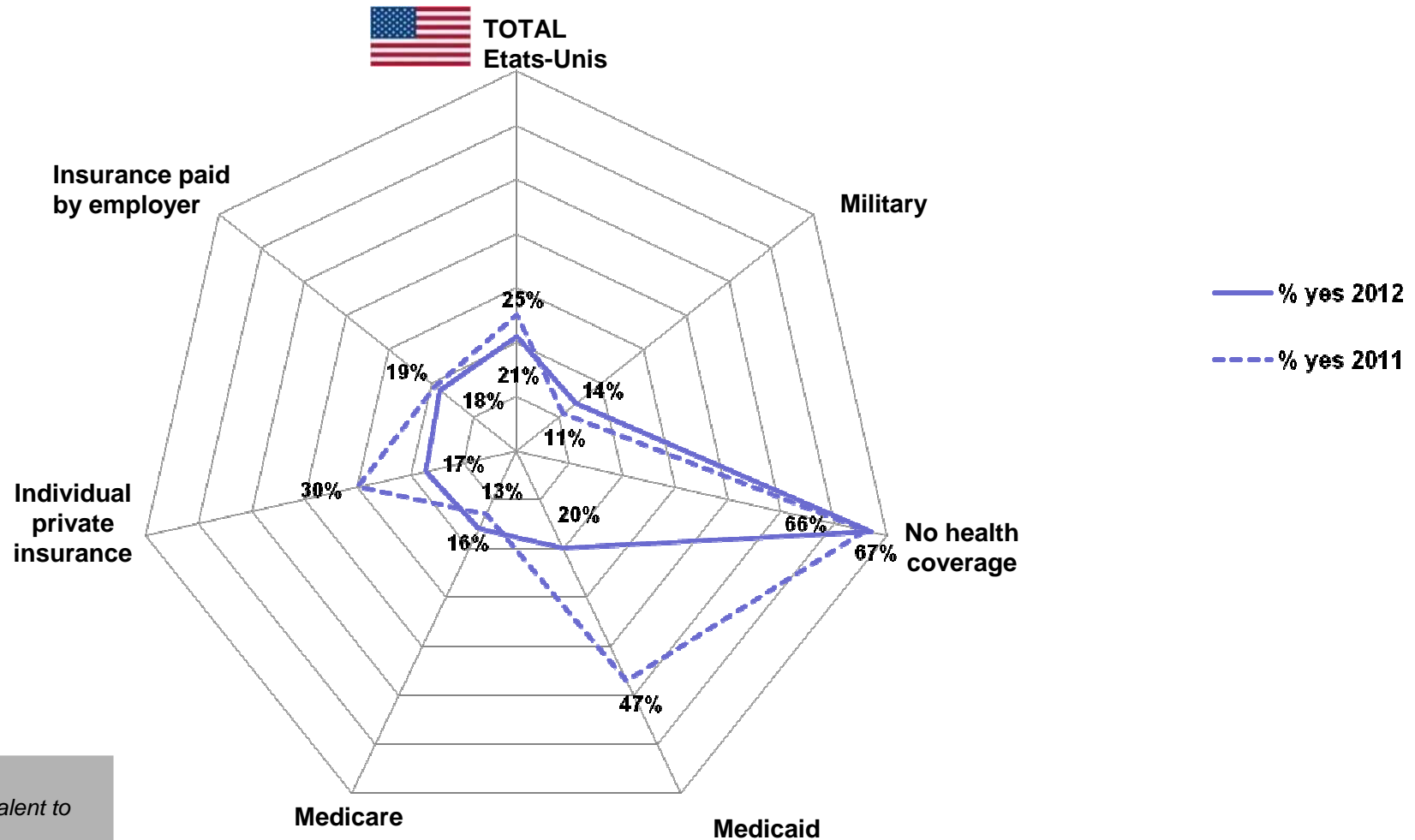
Decline or delay heavy health care because of financial difficulties

Comparison 2012/2011



Evolution of health care decline – Focus USA

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?



Reading Instruction:
Each radian is equivalent to
10% of response

Patients mobility for access to treatment

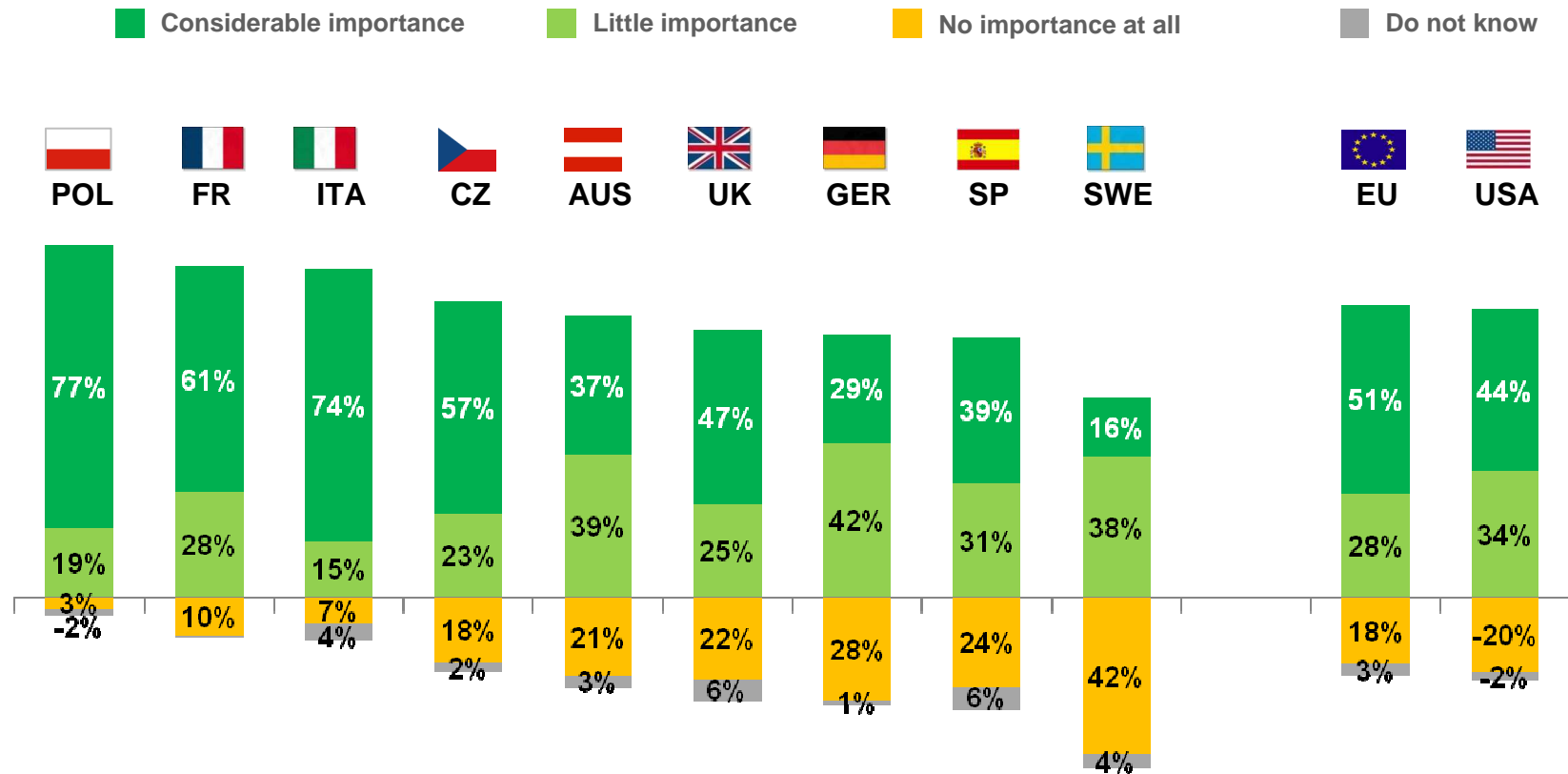


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Mobility and holiday destination

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?

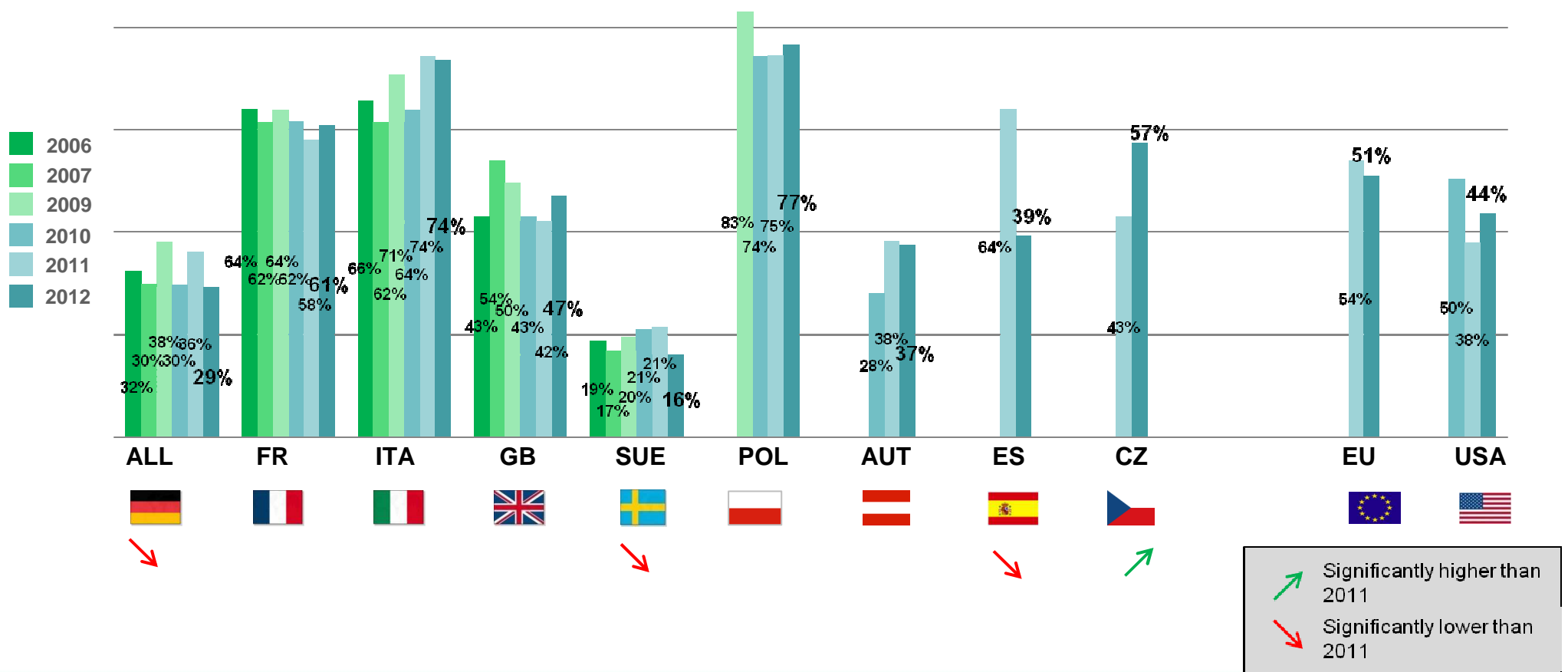


In all countries studied, it is women, those aged 60 and older, inactive or categories who report the most modest attach more importance to local health conditions.

Mobility and holiday destination- Evolution

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?

Evolution between 2006 and 2012 on % of « attaches considerable importance to local health conditions ».



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Management of ageing and dependent people



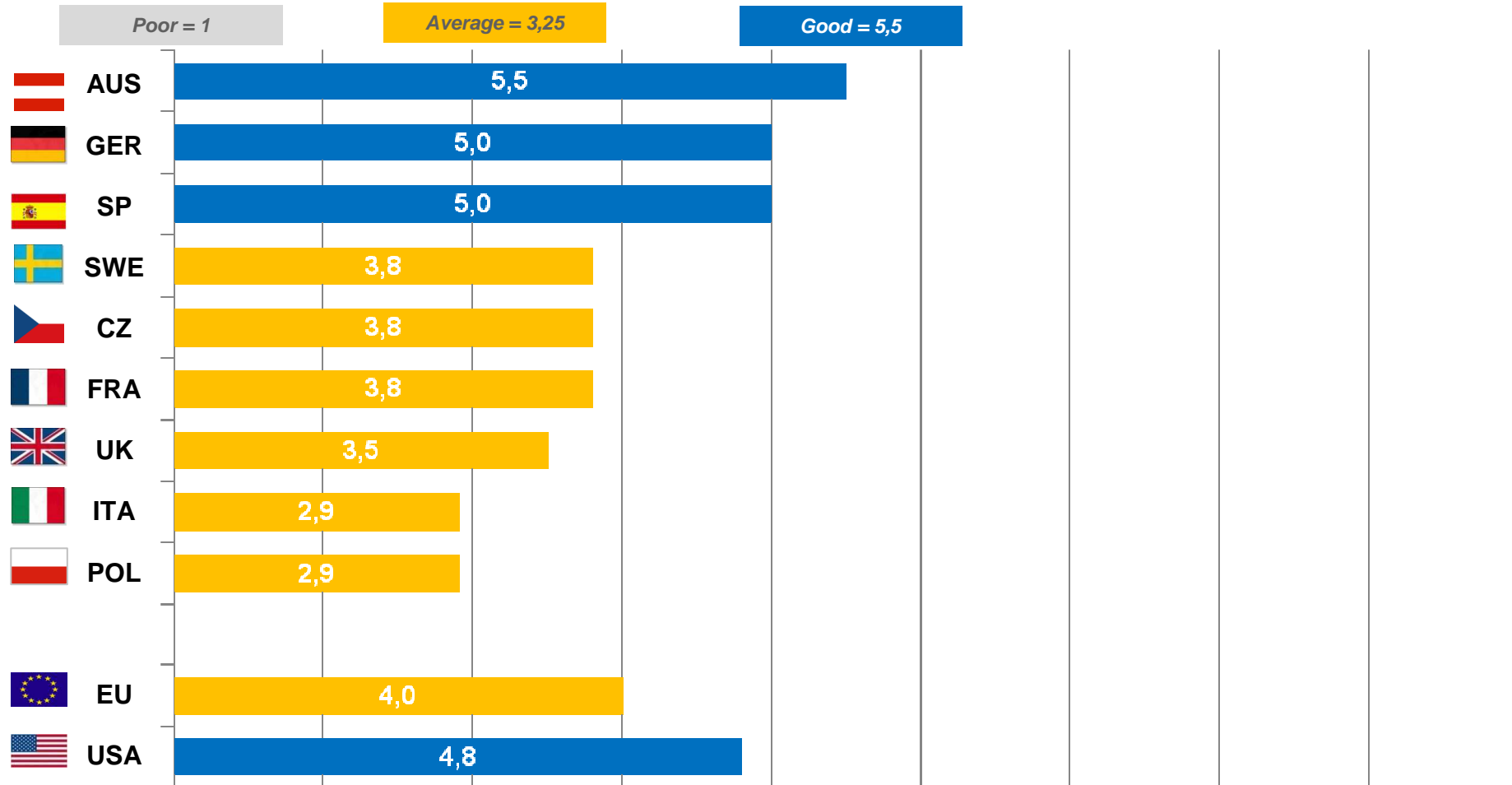
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Evaluation of the management of dependent / elderly people

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

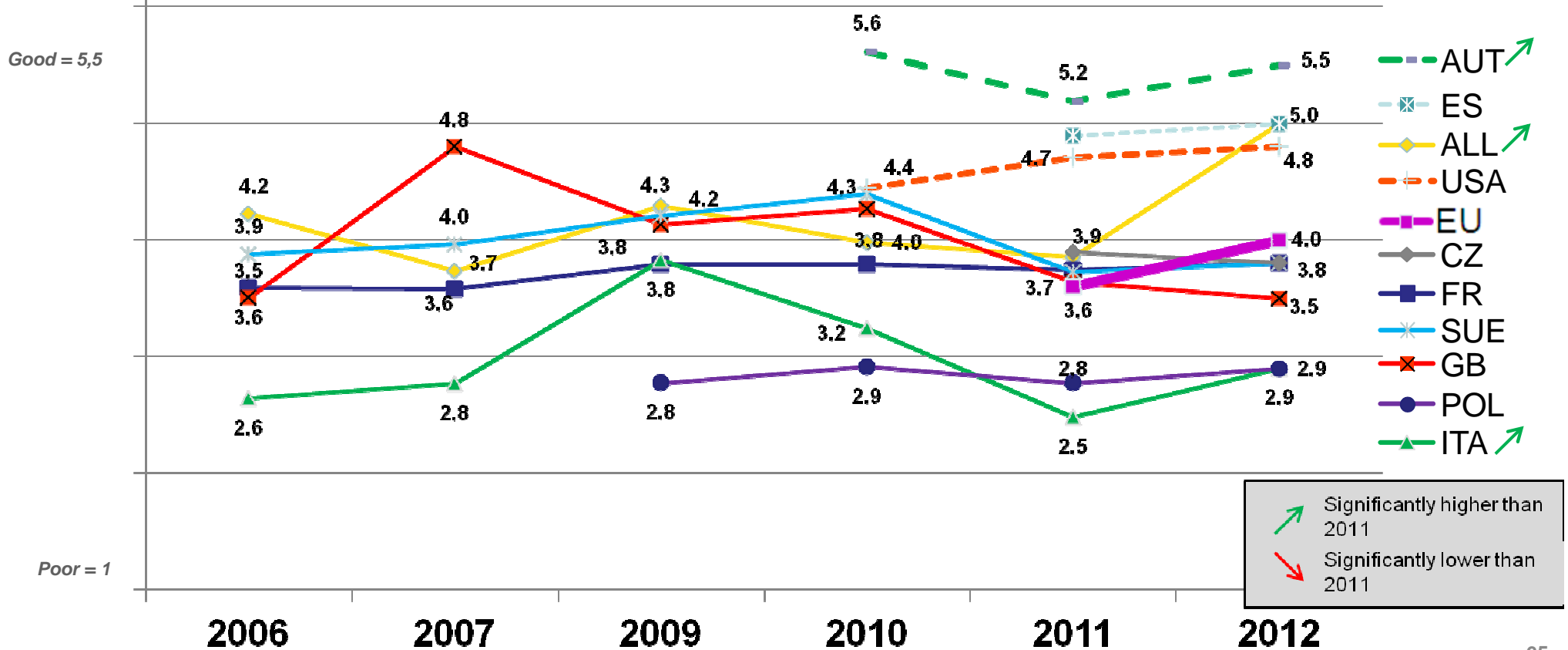
Score calculated with following values : poor =1, average= 3,25, good = 5.5, very good = 7.75, Excellent = 10



Evaluation of the management of dependent / elderly people - Evolution

The organization and the quality of the management of dependent / elderly people is it poor, average, good, very good, excellent?

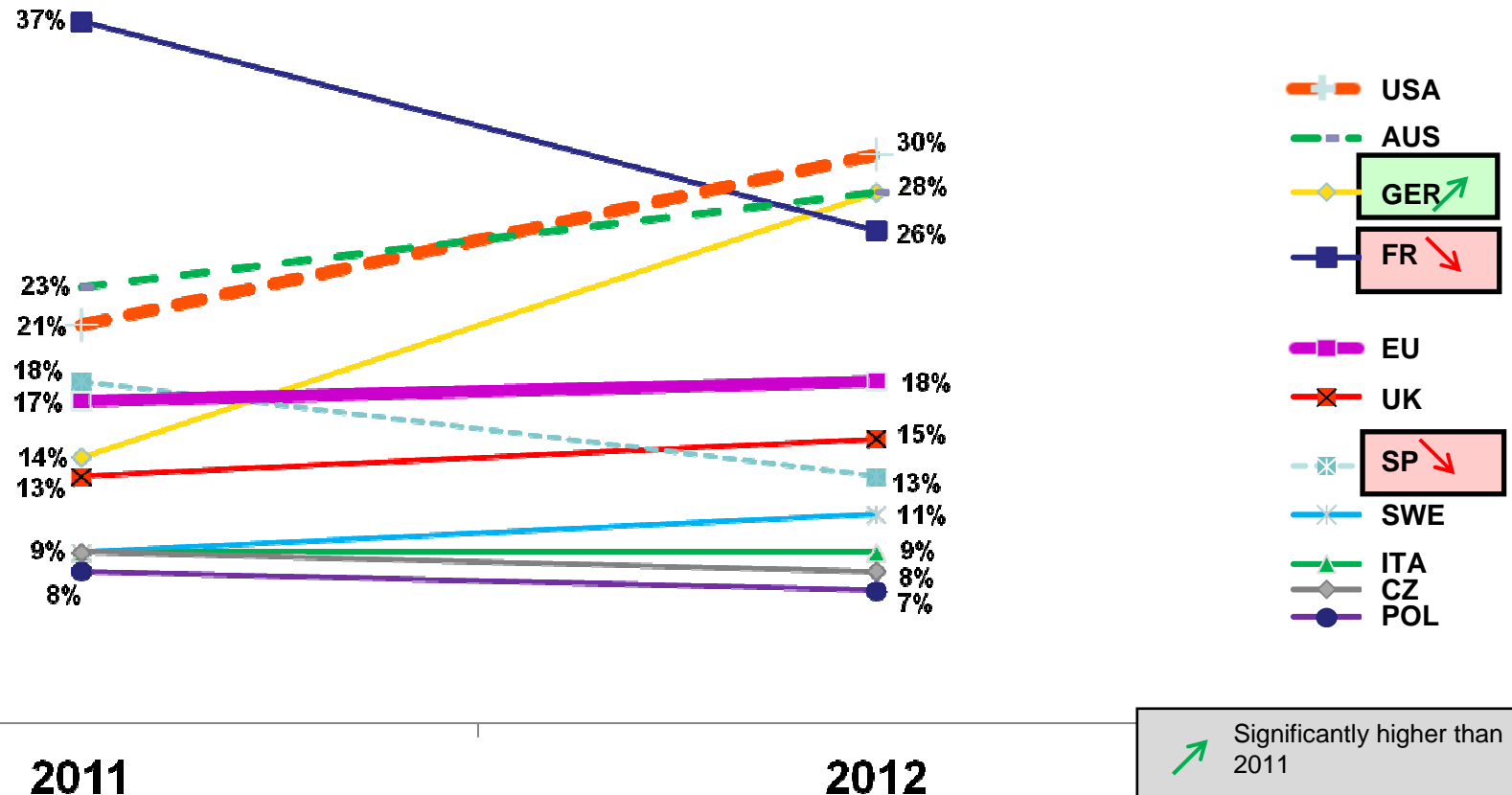
Score calculated with following values : poor = 1, average = 3,25, good = 5,5, very good = 7,75, Excellent = 10
Evolution since 2006





Evaluation of public funding for dependency – Evolution 2011-2012

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

Evolution since 2011 opinions on the consideration of the challenge of dependency (% Yes)

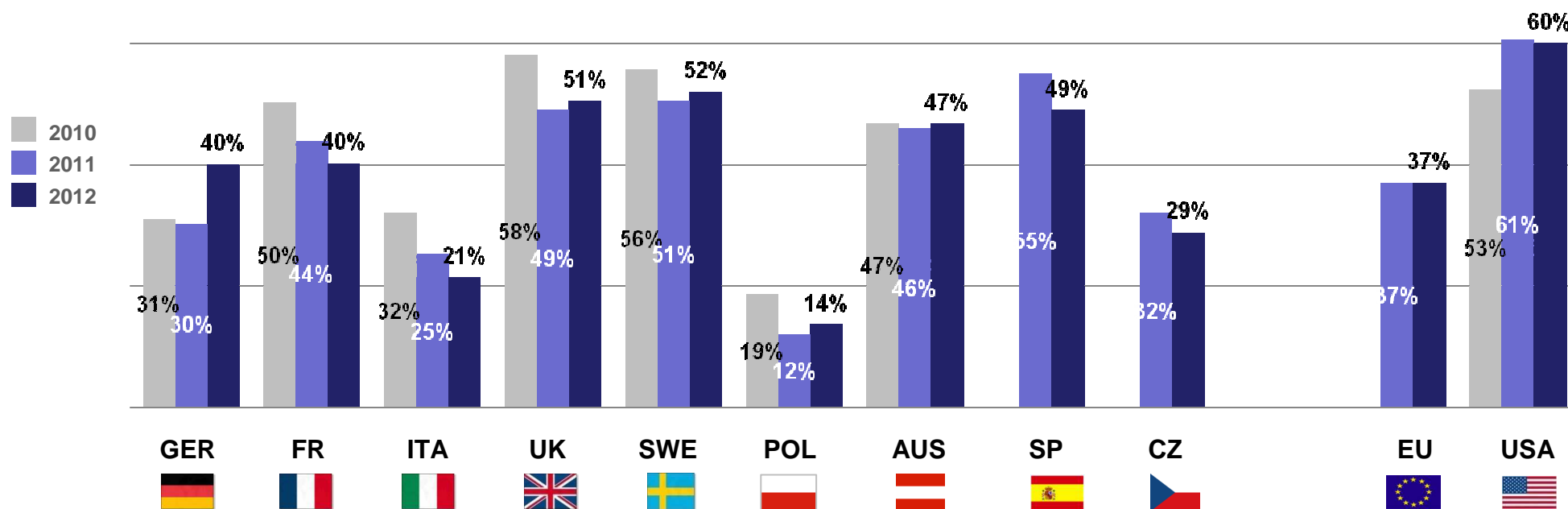




 Significantly higher than 2011
 Significantly lower than 2011

Evaluation of public funding for dependency – Evolution

Currently in our country, the public financial assistance provided to help dependent or elderly people stay in their homes is absolutely satisfactory, somewhat satisfactory, somewhat unsatisfactory, absolutely unsatisfactory ?

Evolution between 2010 and 2012 on % of « public financial assistance is satisfactory ».

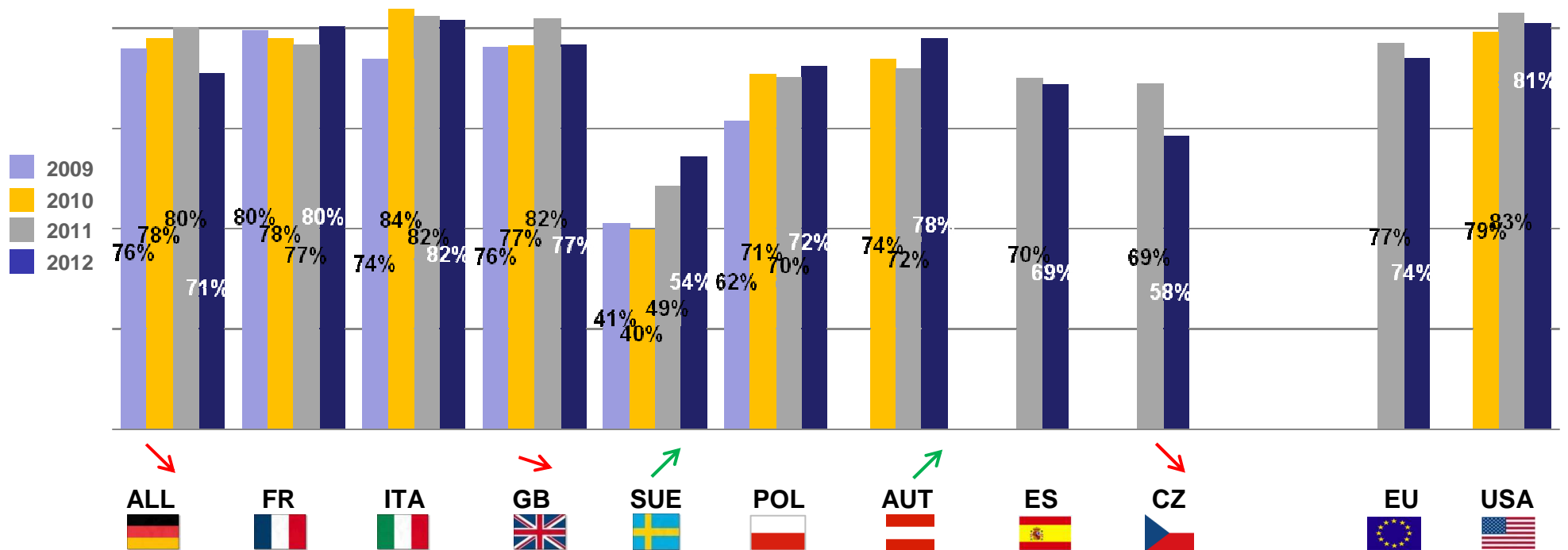




 Significantly higher than 2011
 Significantly lower than 2011

Home care – Evolution

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?

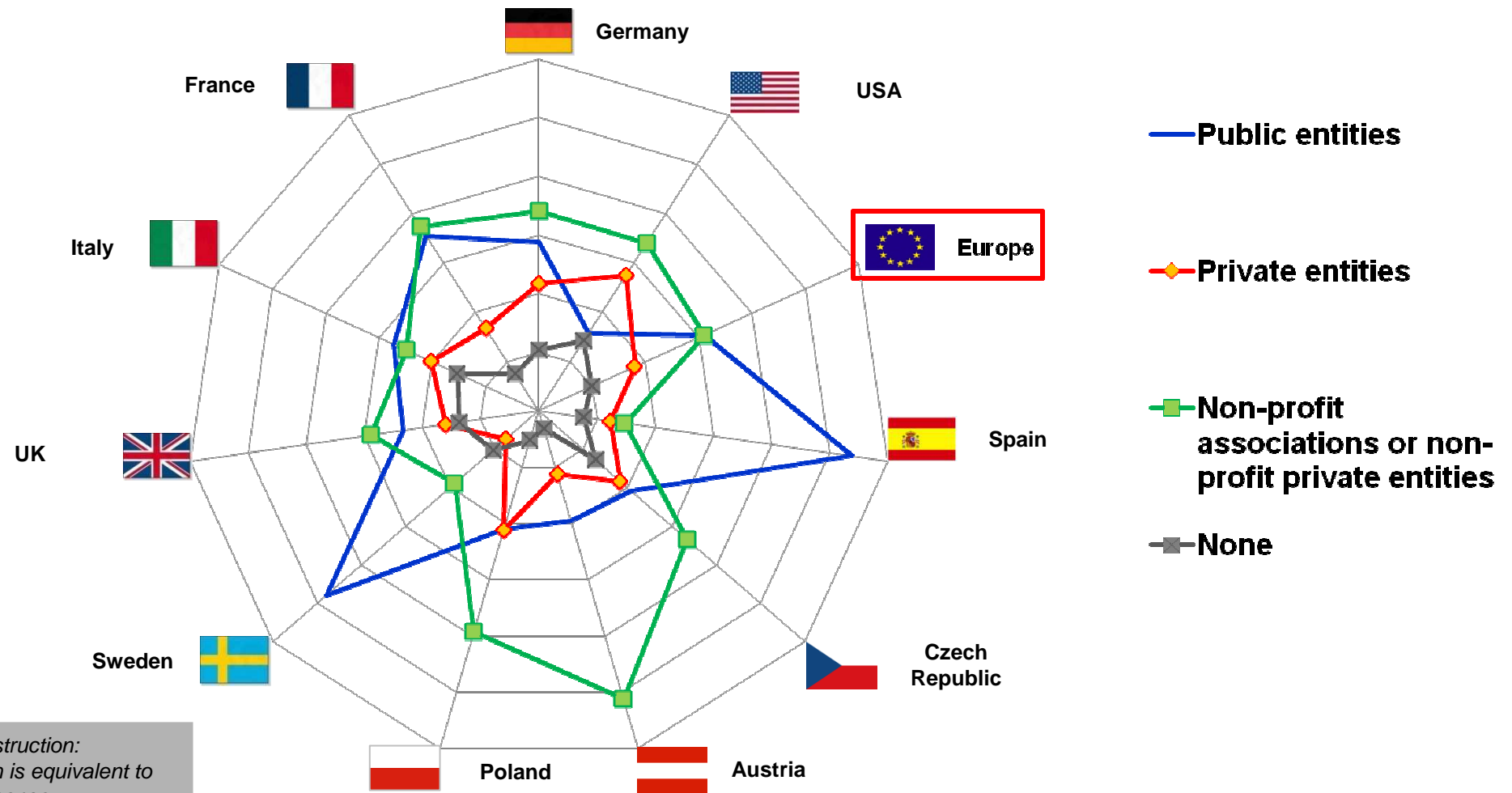
Evolution between 2009 and 2012 in % of home care compared to retirement homes



 Significantly higher than 2011
 Significantly lower than 2011

Dependency – Source of supports

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



Reading Instruction:
Each radian is equivalent to 10% of response

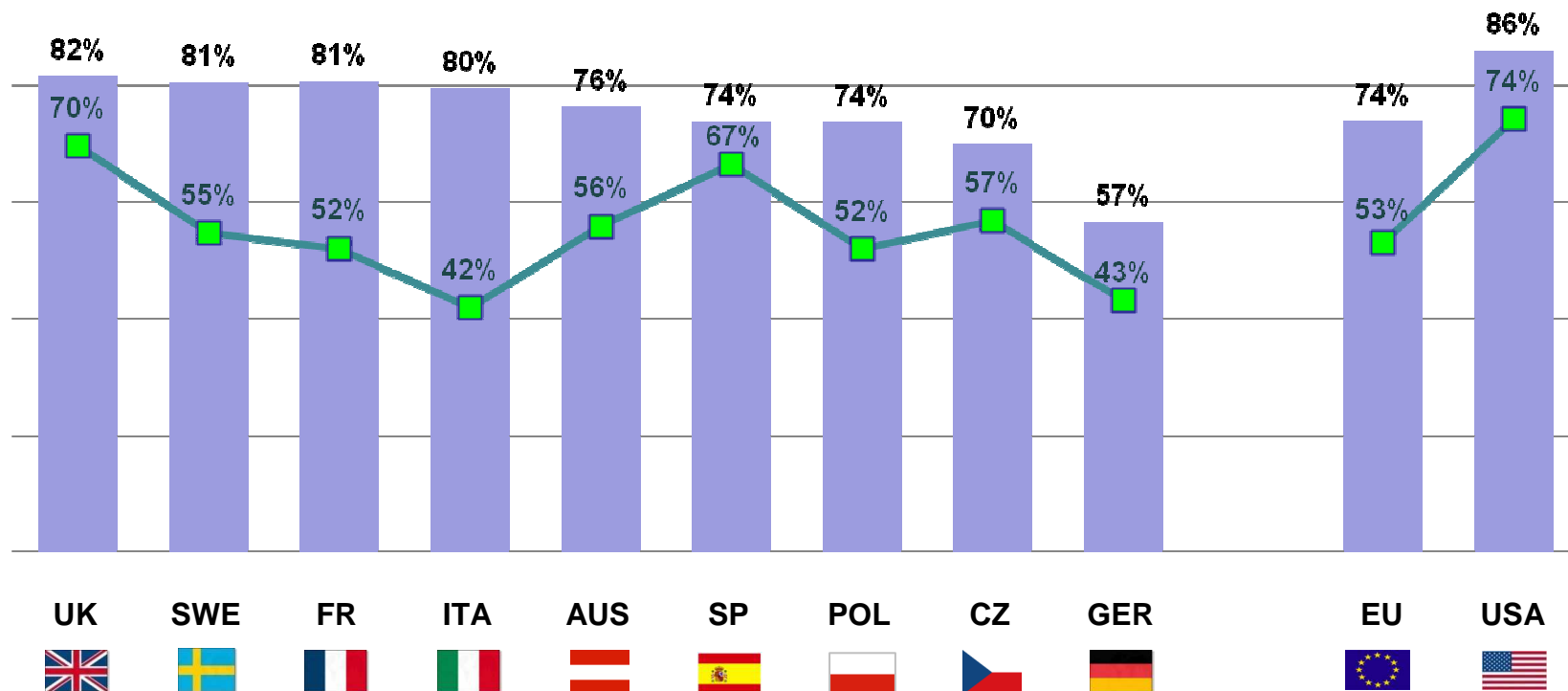
Home care and medical monitoring

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?

■ YES

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?

■ YES



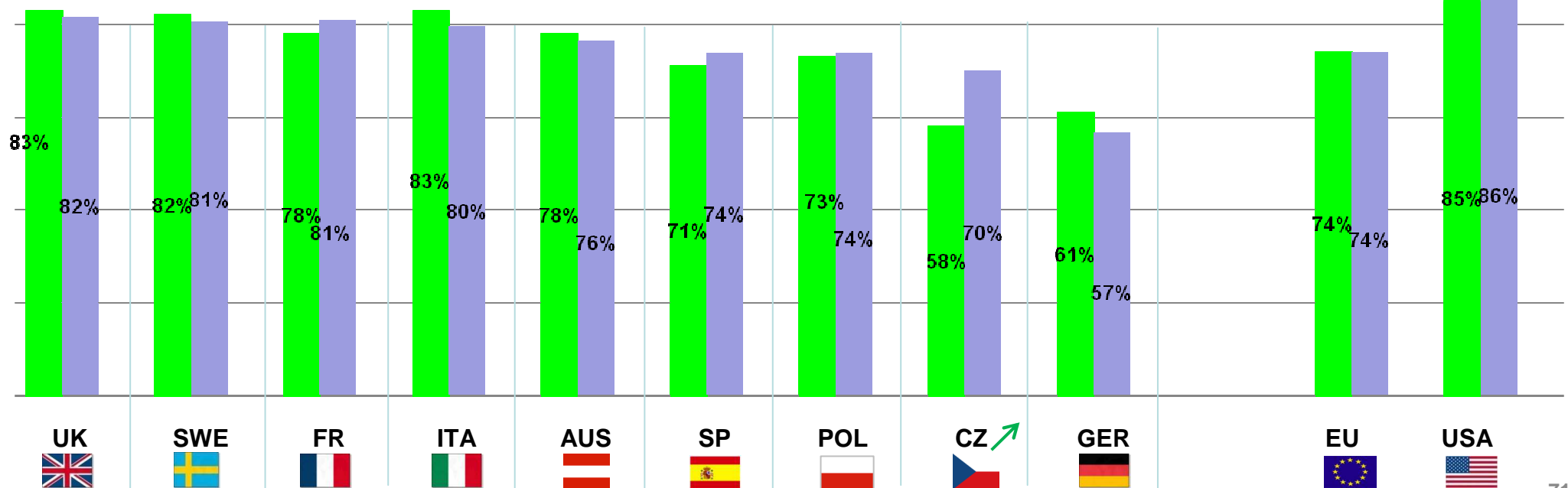
Home care and medical monitoring – Evolution 2011-2012

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?

Yes, willing to equip your older family members with remote monitoring systems

■ Data 2012
■ Data 2011

↗ Significantly higher than 2011
↘ Significantly lower than 2011



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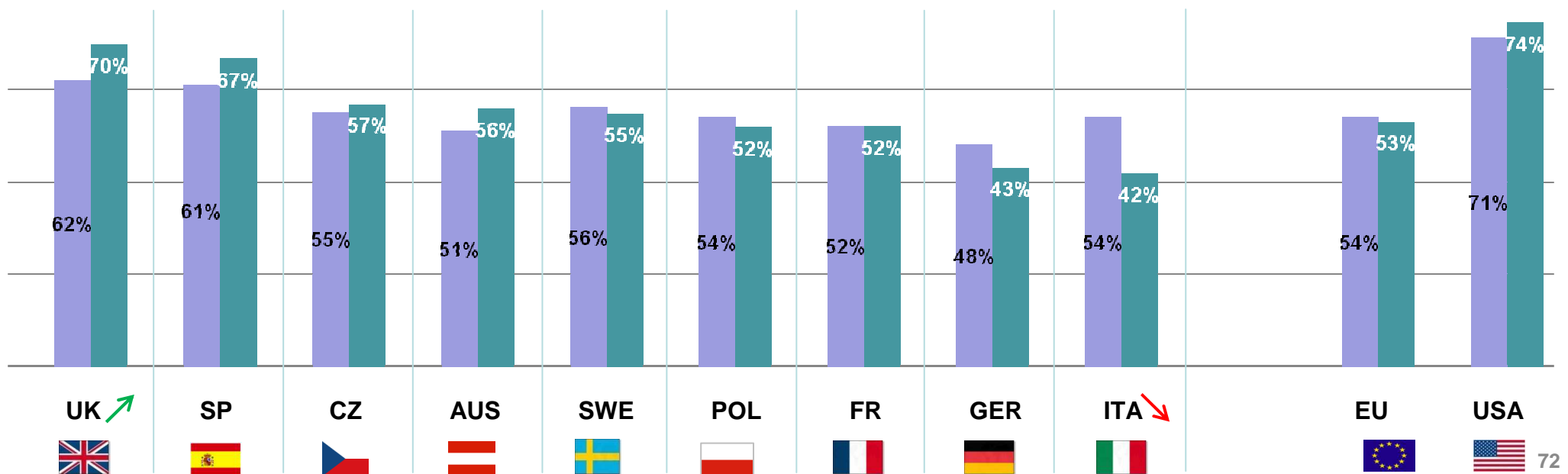
Home care and medical monitoring – Evolution 2011-2012

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?

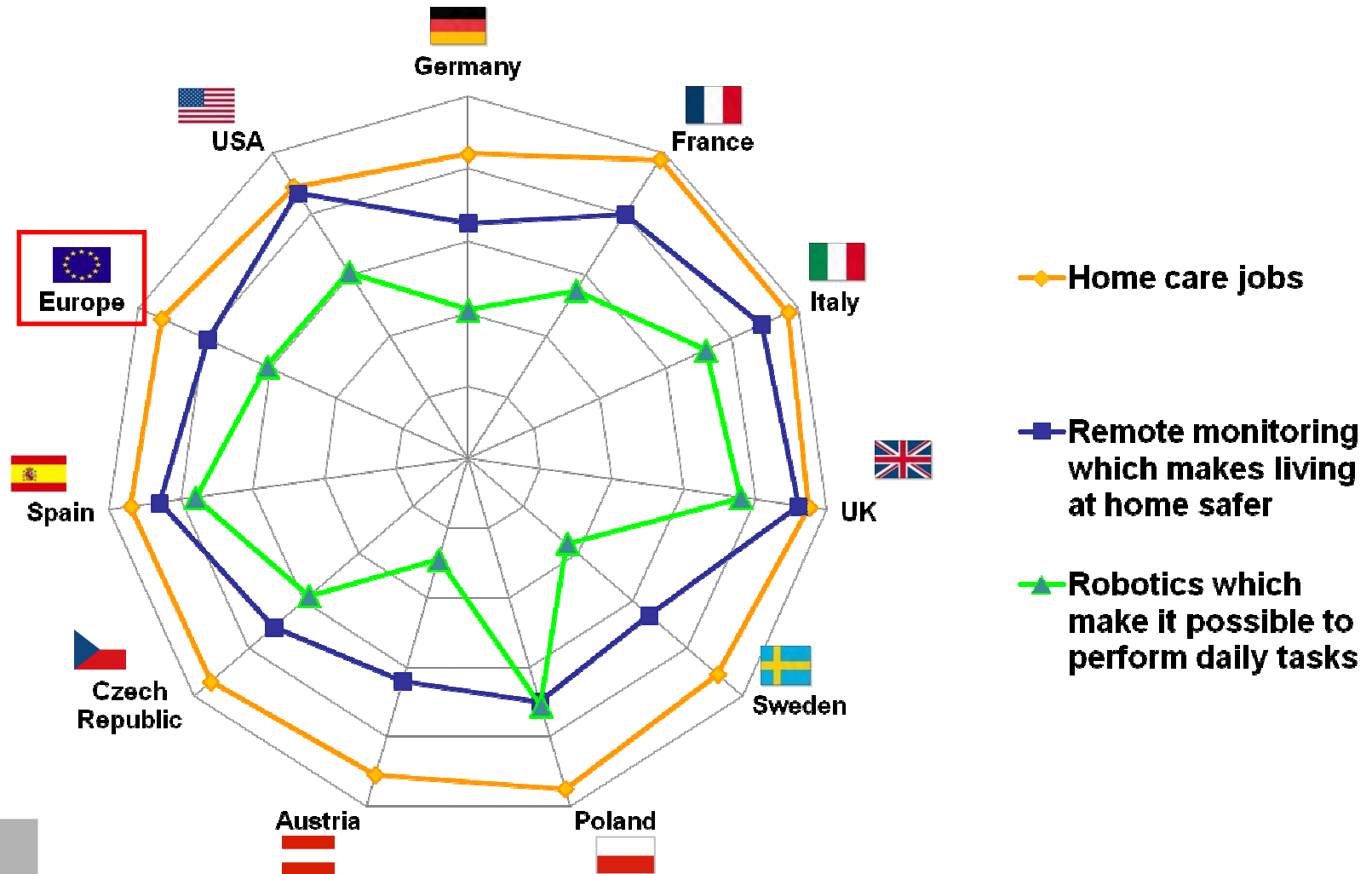
Yes, I think that the techniques for home medical monitoring and follow-up via telephone or the Internet enable dependent elderly persons to remain independent in their own homes

Data 2012
 Data 2011

↗ Significantly higher than 2011
↘ Significantly lower than 2011



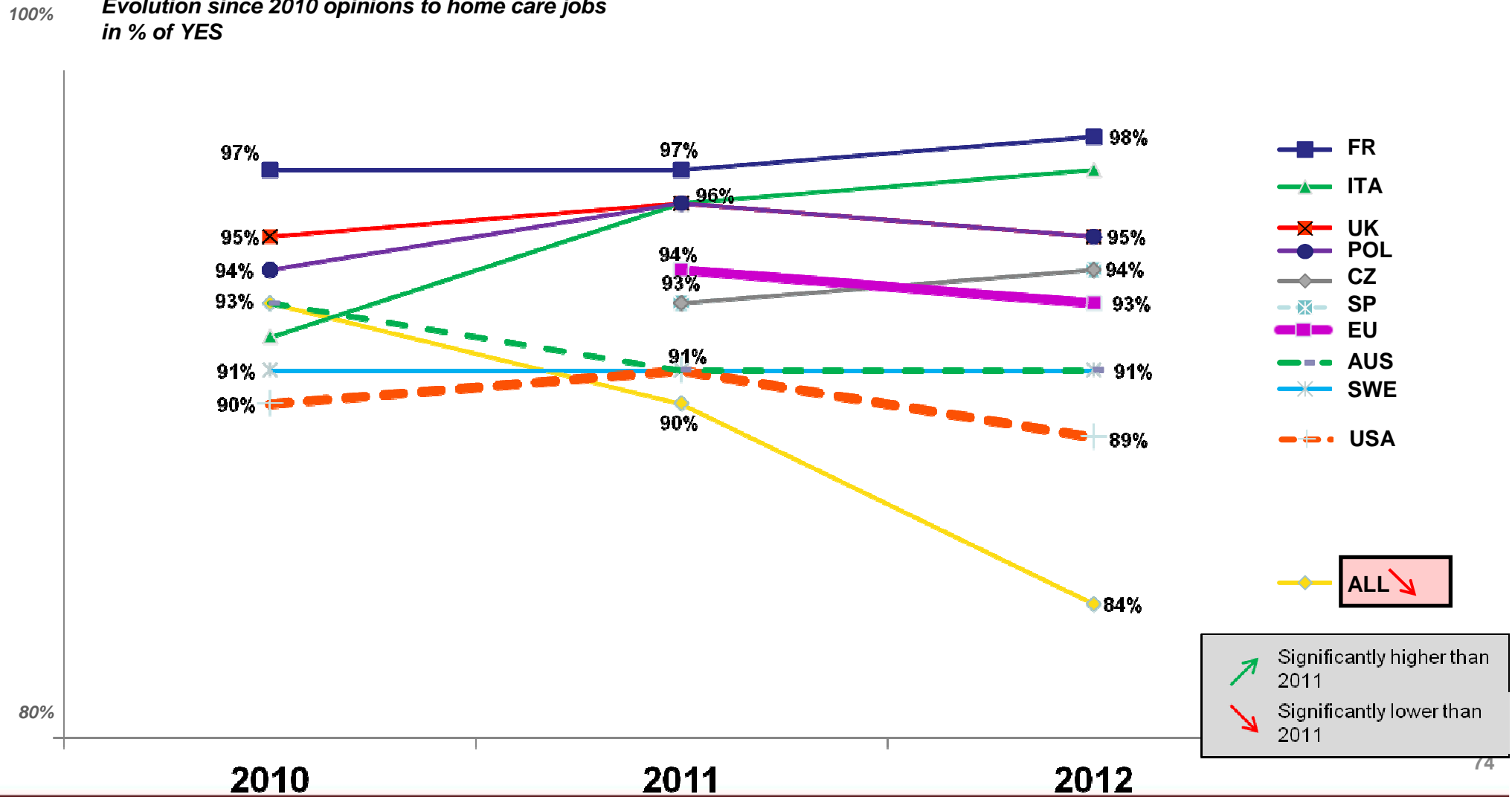
To help dependent elderly people stay in their homes, do you think we must develop...?



Reading Instruction:
Each radian is equivalent to 20% of response

Priority of home care jobs

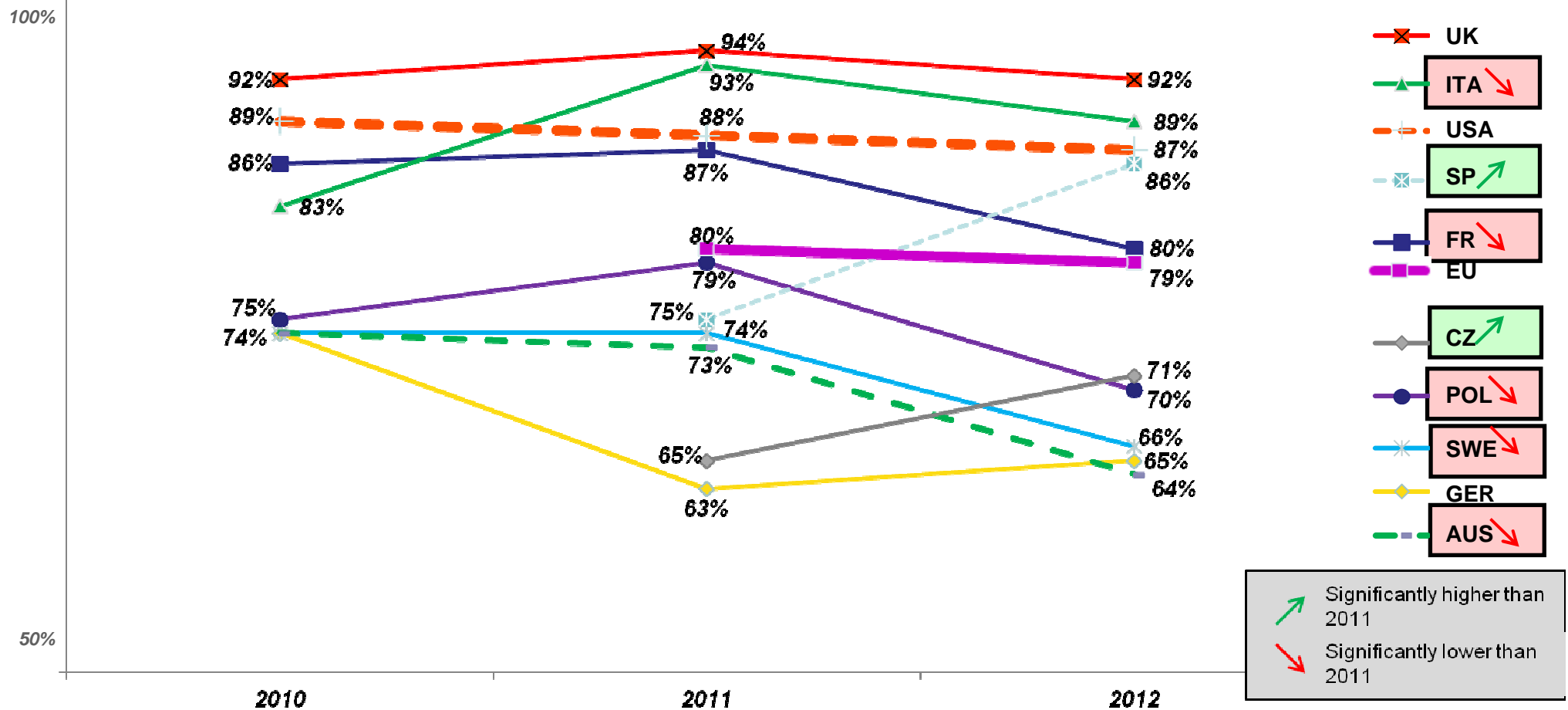
Evolution since 2010 opinions to home care jobs in % of YES



Priority to remote monitoring which makes living at home safer

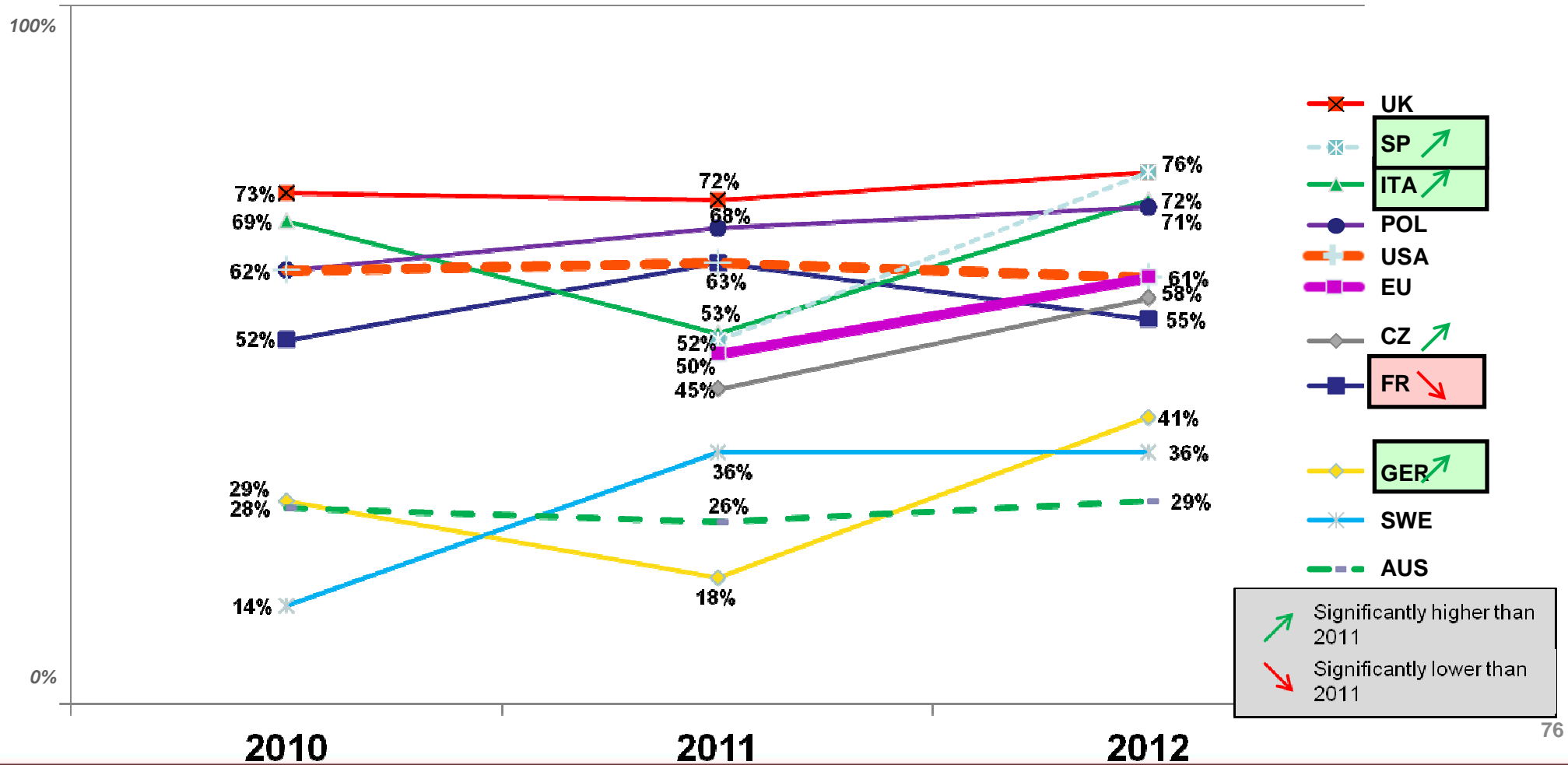
Evolution of opinions about remote monitoring which makes living at home safer

in % of YES

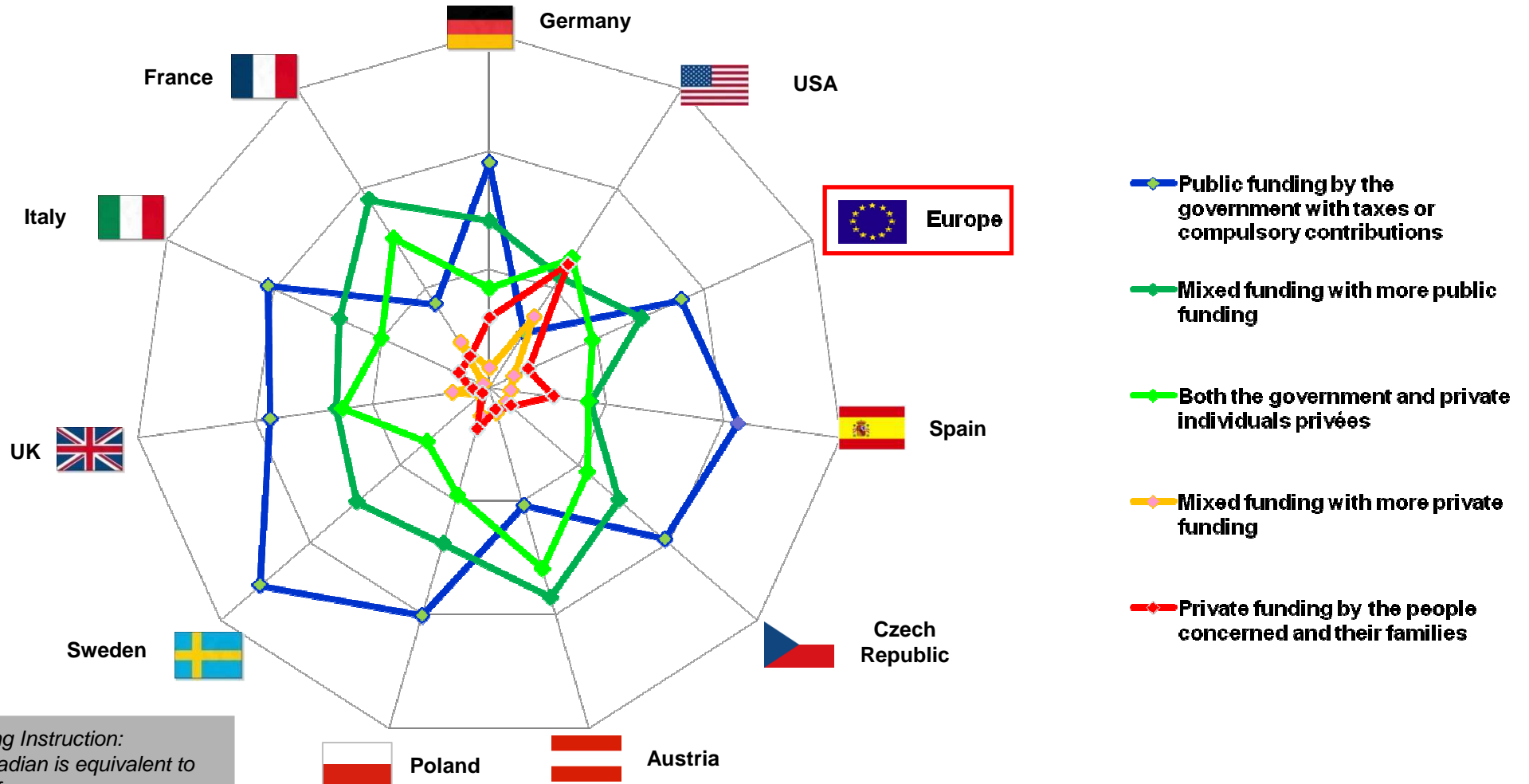


Priority to robotics which make it possible to perform daily tasks

Evolution of opinions robotics which make it possible to perform daily tasks
in % of YES

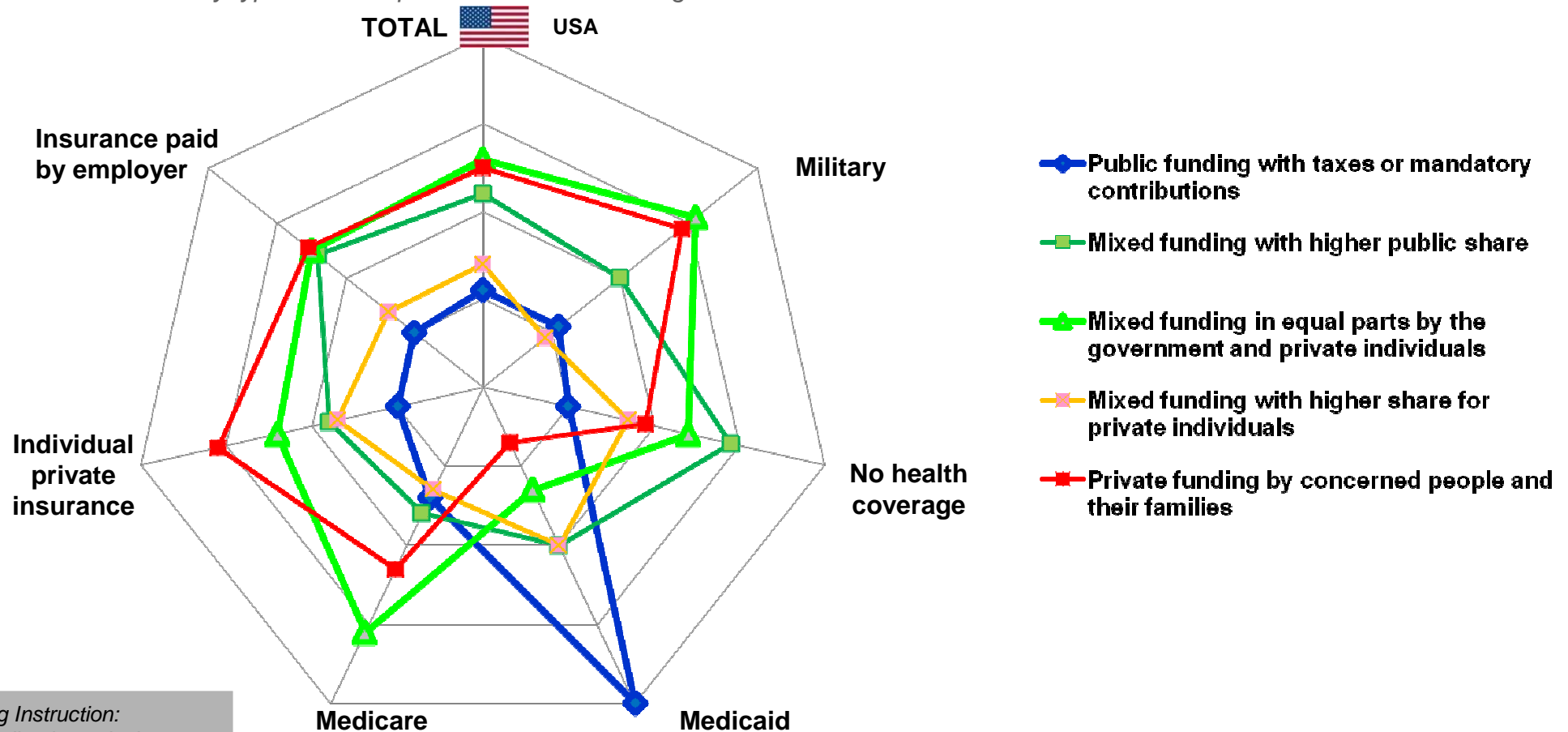


In your opinion, who should pay for the services and assistive devices which make it possible to meet the daily needs of elderly and dependent persons?



Who should pay for the services and assistive devices which make it possible to meet the daily needs of elderly and dependent persons?

USA : Breakdown by type of the respondent's health coverage.

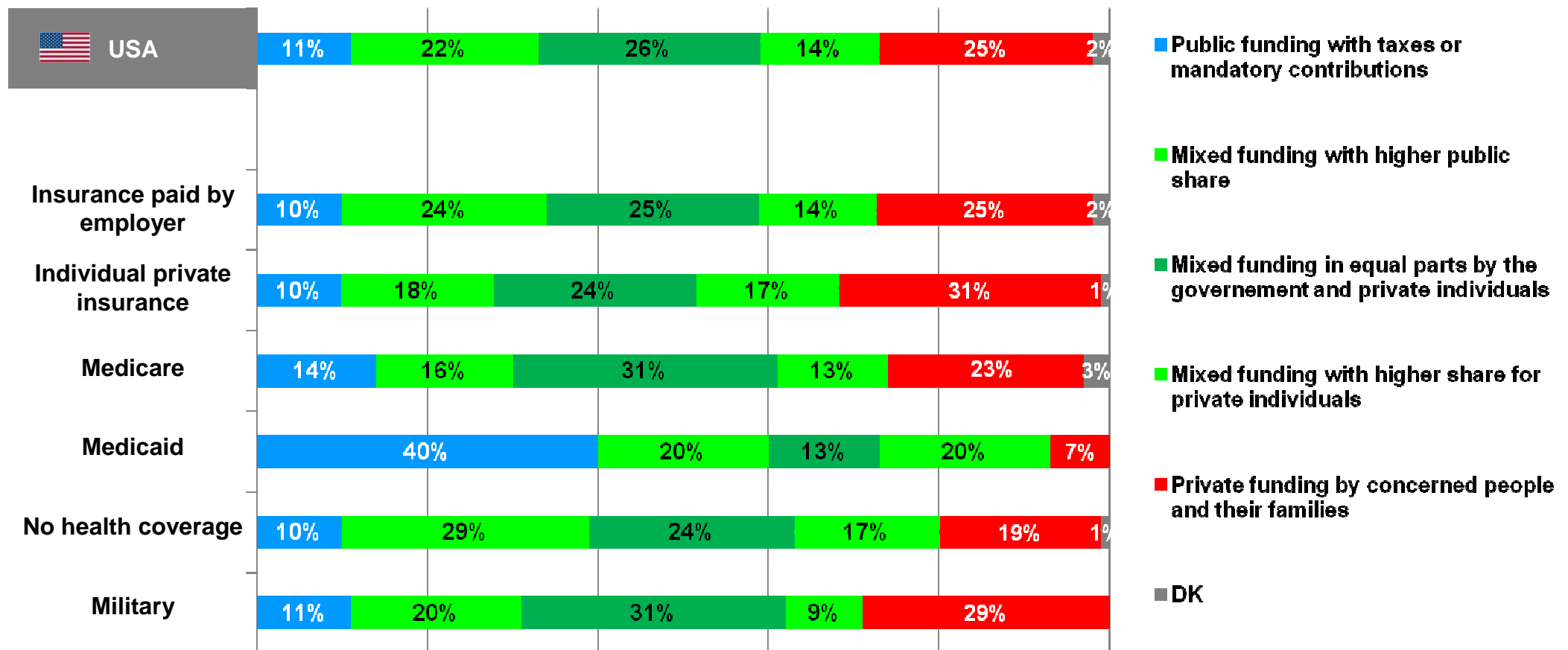


Reading Instruction:
Each radian is equivalent to
10% of response

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?

USA : Breakdown by type of the respondent's health coverage



New technologies



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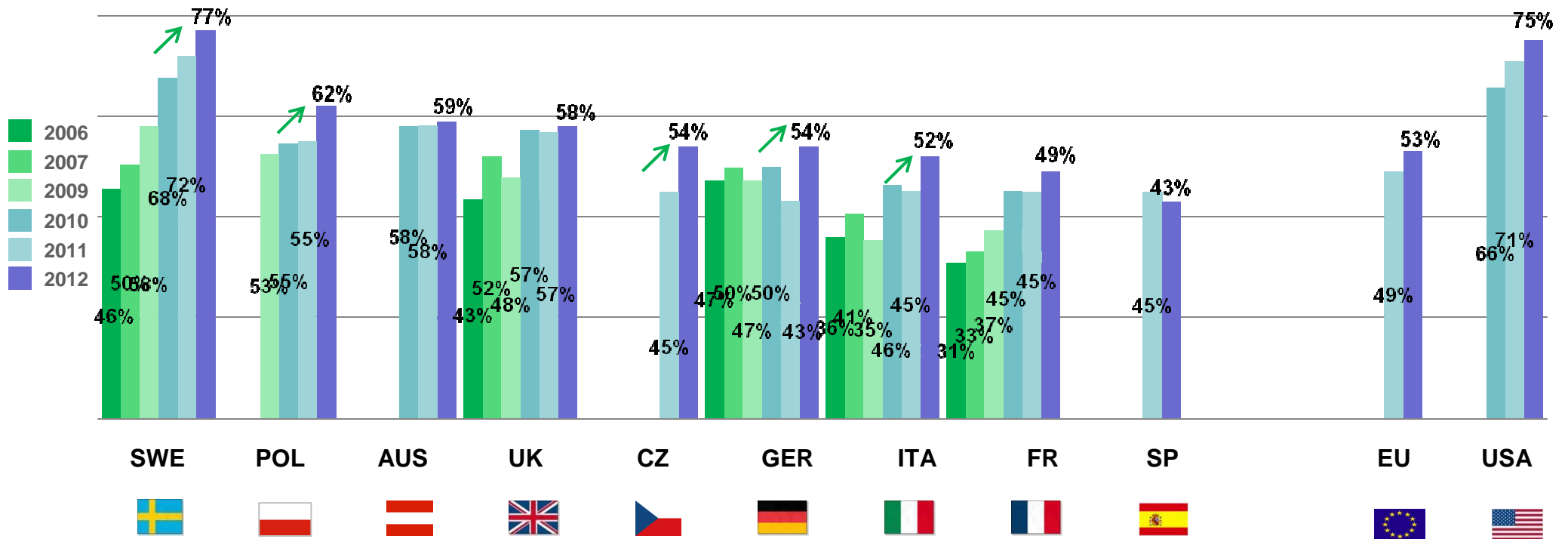


Informations on the Internet - Evolution

Do you use the Internet for information relating to healthcare ?

 Significantly higher than 2011
 Significantly lower than 2011

Evolution in % of sub-total « YES, regularly », « YES, occasionally », « NO never »



In all countries, the use of the Internet remains higher among young people(18-35 years), professionally active people, men, people with a higher social grade and people living in urban areas.



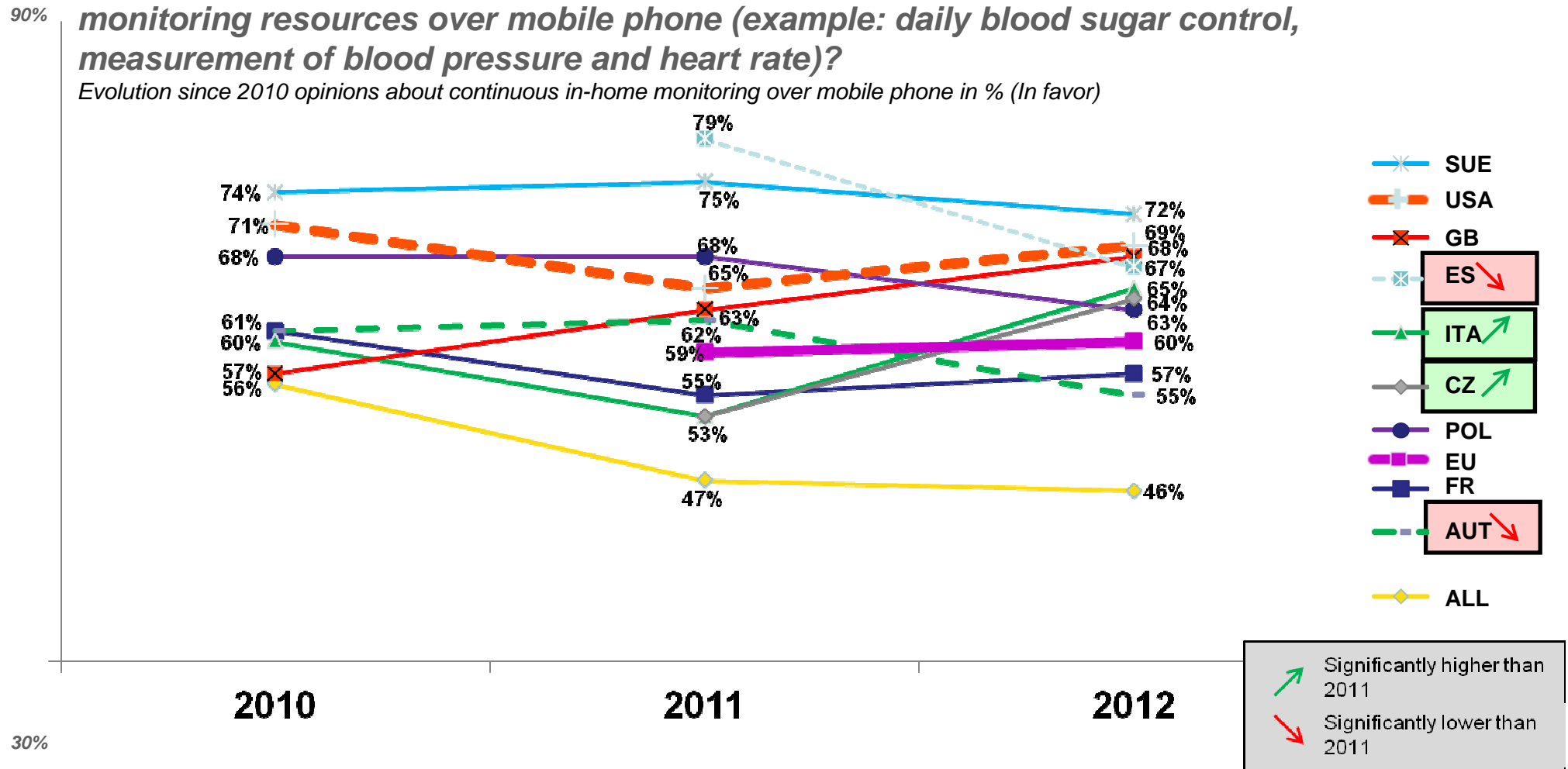
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Continuous in-home monitoring over mobile phone – Evolution 2010-2012

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)?

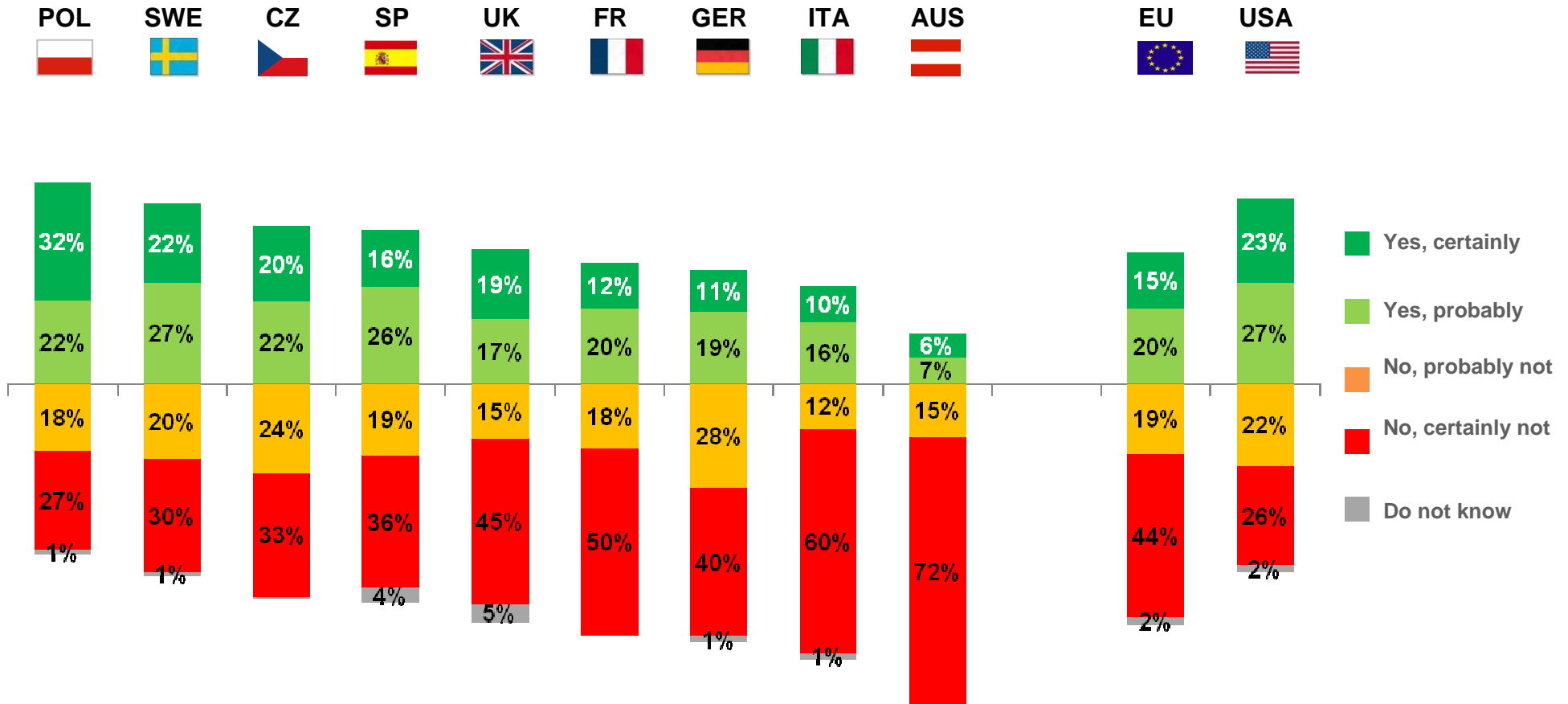
Evolution since 2010 opinions about continuous in-home monitoring over mobile phone in % (In favor)



Remote medical consultation and Internet

Nouvelle question 2012

If it was proposed to you, would you be willing or not to consult your general practitioner remotely via the Internet by means of a webcam?



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Remote medical consultation by Internet - Evolution

2011 :

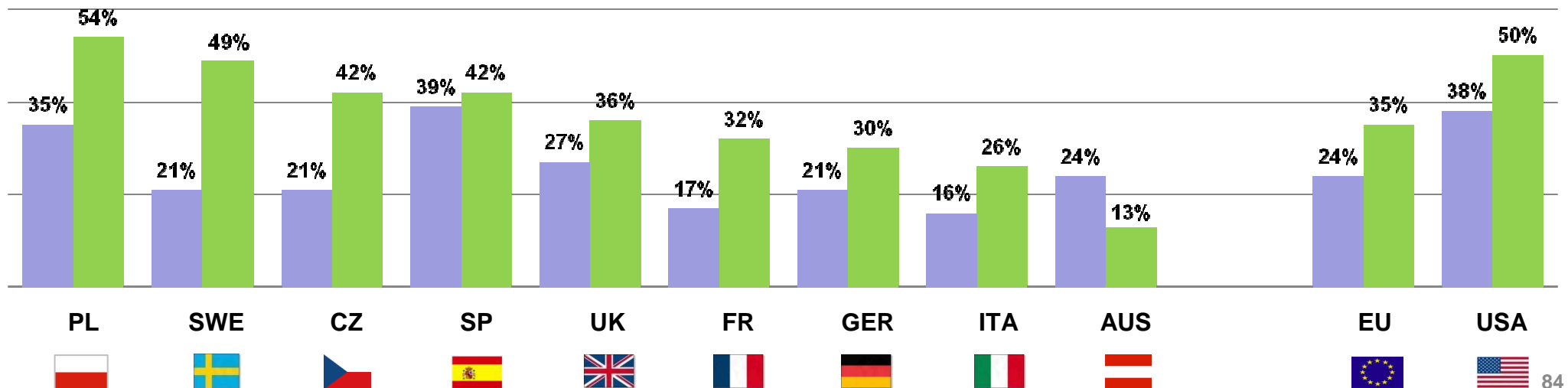
For you, would you be willing or not to consult your general practitioner remotely via the Internet by means of a webcam?

■ 2011 : Answers « Yes »

2012 :

If it was proposed to you, would you be willing or not to consult your general practitioner remotely via the Internet by means of a webcam?

■ 2012: Answers « Yes, certainly » + « Yes, probably »



Prevention

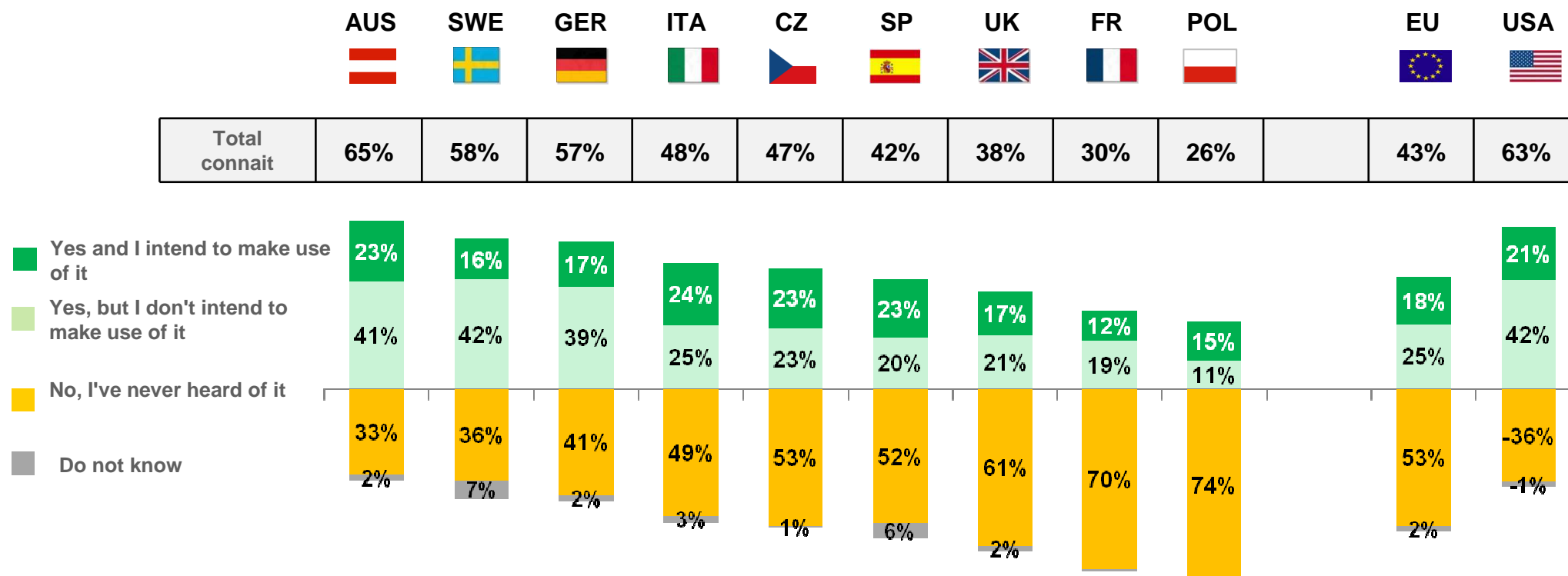


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Individuals will soon be able to access their own genetic map which will make it possible to predict their genetic risk for serious illness.

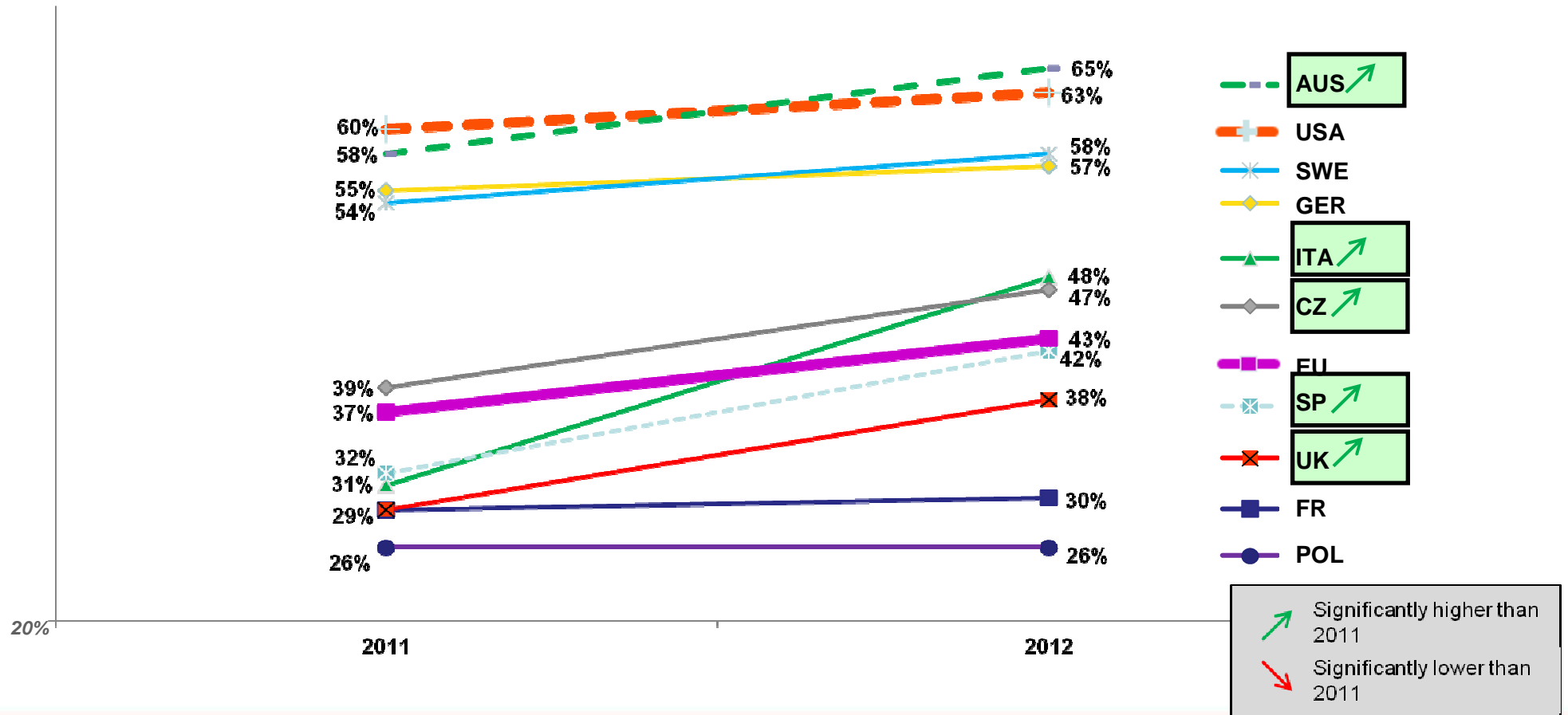
Have you ever heard of this and do you intend to make use of it?



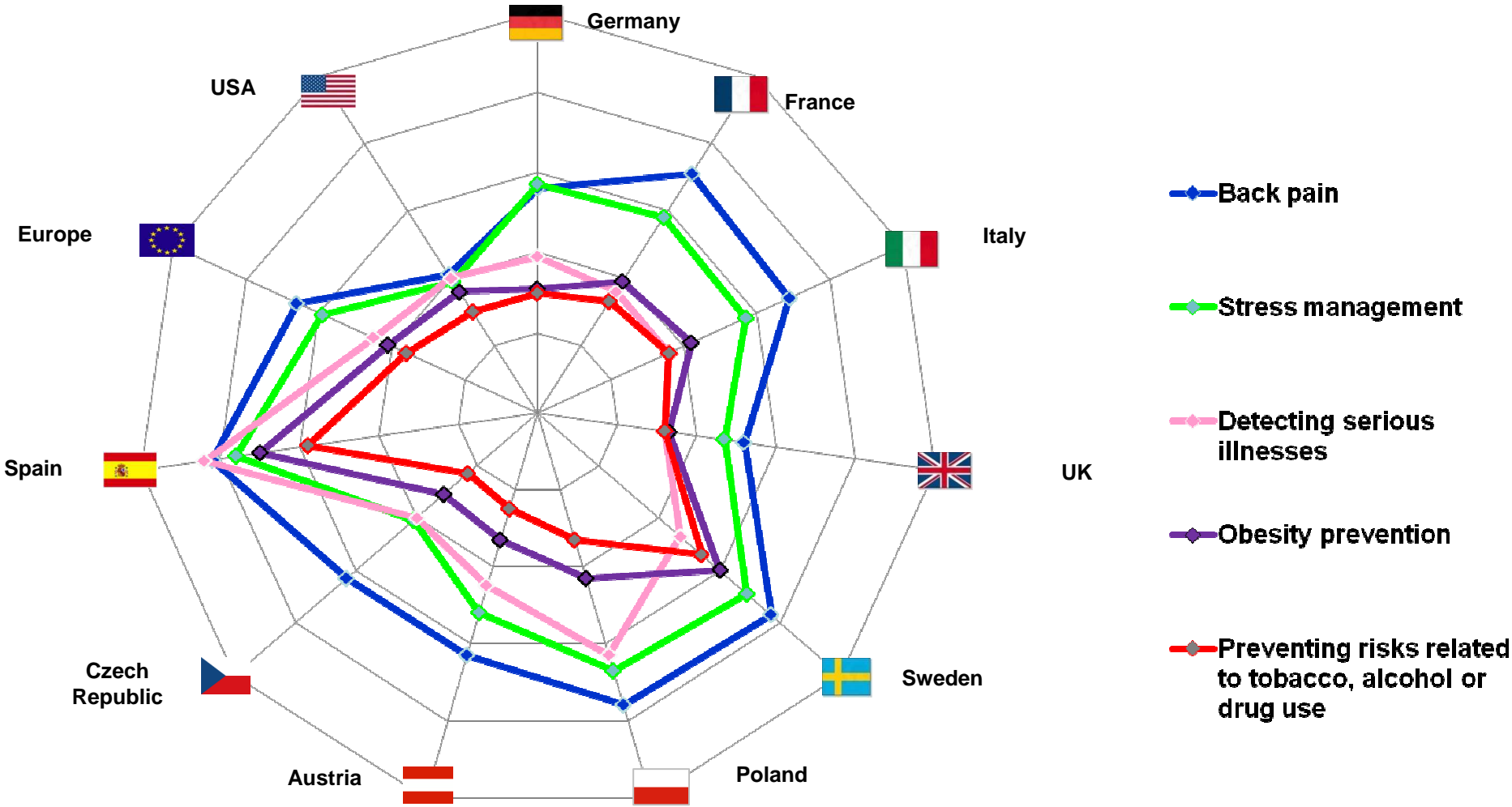
Individuals will soon be able to access their own genetic map which will make it possible to predict their genetic risk for serious illness.

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

Evolution since 2011 opinions on genetic map (% Know)



In the context of your job, do you feel that you need health programs for...?



Reading Instruction:
 Each radian is equivalent to 10% of response
 Base : respondents with professional activity

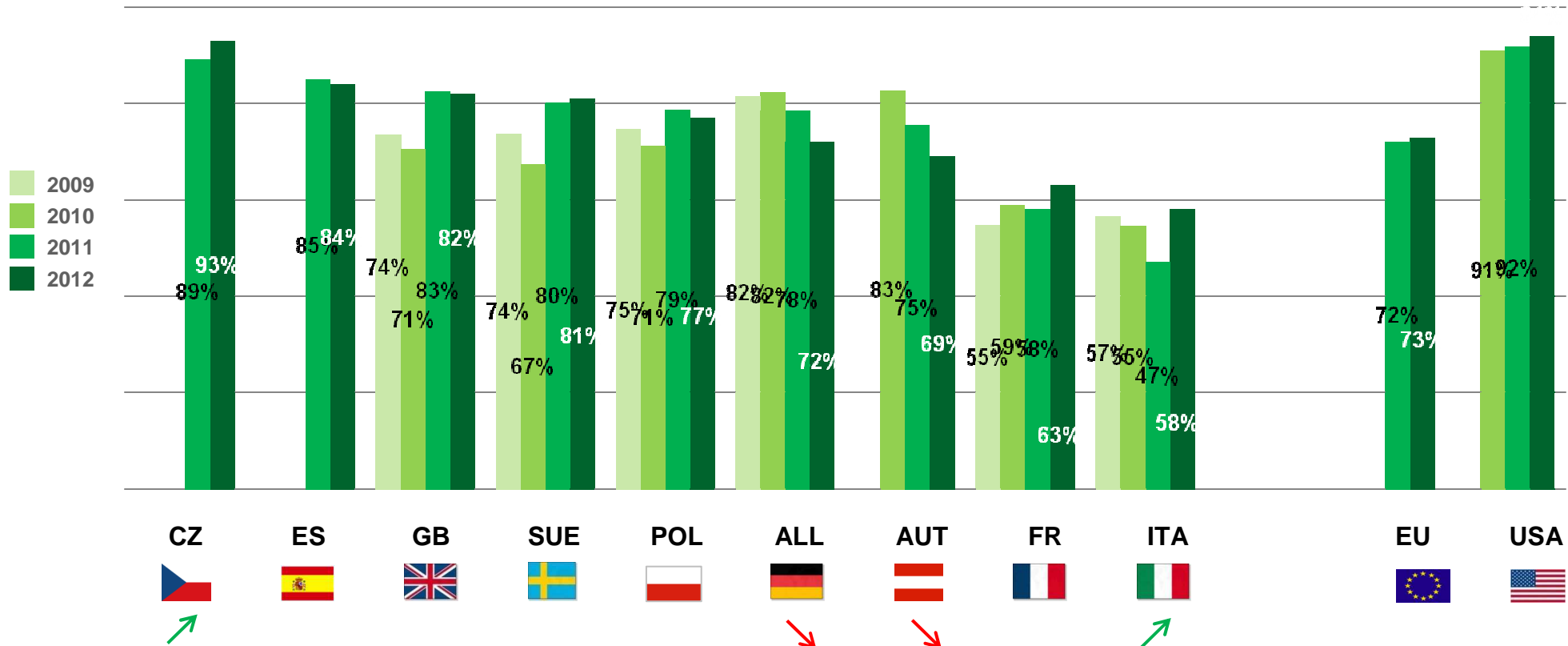


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In the last 5 years, have you been for a check-up ?

Evolution de 2009 à 2012 en % de « a fait un bilan de santé dans les 5 ans »





Contribution of healthcare sector to Economy



Contribution of health sector to Economy - Evolution

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: contributes to the country's economic growth, is merely a burden for society?

Evolution between 2006 to 2012 in % answers to « contributes to the country's economic growth »

 Significantly higher than 2011
 Significantly lower than 2011

