

Health & Society Barometer - Europ Assistance / CSA

2013: 7th wave of the barometer

15 October 2013

Context, objectives and methodology



Objectives of the study

In 2006, the Europ Assistance Group and the Cercle Santé Société, alongside the CSA Institute, launched an annual pan-European barometer on the relationship and practices of European citizens with regard to their health systems. Set against the context of the radical change within the sector, the objective of the barometer is to provide clarification on the position of the citizens, in order to introduce public opinion into the major debates that are gripping the healthcare sector.

This year, the barometer will be published on the occasion of the 50th anniversary of Europ Assistance.






➤ The focus for 2013:

- **On the occasion of the 50th anniversary of the assistance group**, established in France by Pierre Desnos, the founder of Europ Assistance, the Santé&Société Europ Assistance / CSA barometer focuses this, its 2013 edition, on addressing the topic of **healthcare and travel**, assessing the contributions for repatriation for medical reasons
- **Health and business**: the main expectations of expatriate employees regarding the 4 S': "Santé, Sécurité, Scolarité, Salaire" (Healthcare, Safety, Schooling, Salary)
- **Healthcare and new communication technologies and** the contribution of healthcare social networks

➤ The topics addressed by the barometer:

- Evaluation of the health system and the quality of treatments
- Health and social demands
- Mobility within access to treatment
- The ageing population and the provision of care to elderly and dependent people
- New technologies
- Prevention
- Contribution of the healthcare sector to the economy

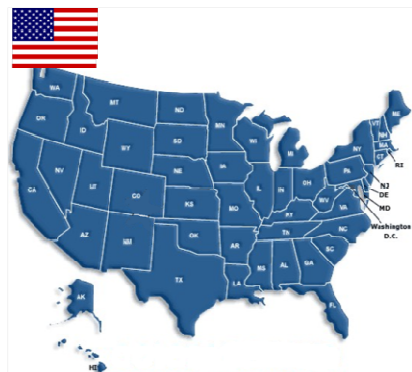
The scope of the barometer

Year	Country		Staff	
2006-2007	<ul style="list-style-type: none"> • Germany • France • Italy • United Kingdom • Sweden 		• 400 for each country	
2009	<ul style="list-style-type: none"> • Germany • France • Italy • United Kingdom • Sweden 	• Poland	• 400 for each country	
2010	<ul style="list-style-type: none"> • Germany • France • Italy • United Kingdom • Sweden 	<ul style="list-style-type: none"> • Poland • USA • Austria 	<ul style="list-style-type: none"> • 400 for the European countries • 800 for the USA 	
2011-2012	<ul style="list-style-type: none"> • Germany • France • Italy • United Kingdom • Sweden 	<ul style="list-style-type: none"> • Poland • USA • Austria • Spain • Czech Republic 	<ul style="list-style-type: none"> • 500 for the European countries • 1000 for the USA 	
2013	<ul style="list-style-type: none"> • Germany • France • Italy • United Kingdom • Sweden 	<ul style="list-style-type: none"> • Poland • USA • Austria • Spain 	<ul style="list-style-type: none"> • 500 for the European countries • 1000 for the USA 	

The scope of the barometer

Sampling data sheet

- Means of gathering data: interviews by telephone – cati - at the home of the interviewees.
- **Sampling plan:** a national sample representative of citizens aged 18 years old and older, structured in accordance with the quotas method (gender, age, region and socio-professional category).
- **Size of samples:** 500 individuals aged 18 years old and older per European country and 1,000 individuals in the United States, amounting to 5,000 interviews in a total of 9 countries.
- **Field dates:** May - June 2013.
- **Time required to complete the questionnaire:** 15 minutes.



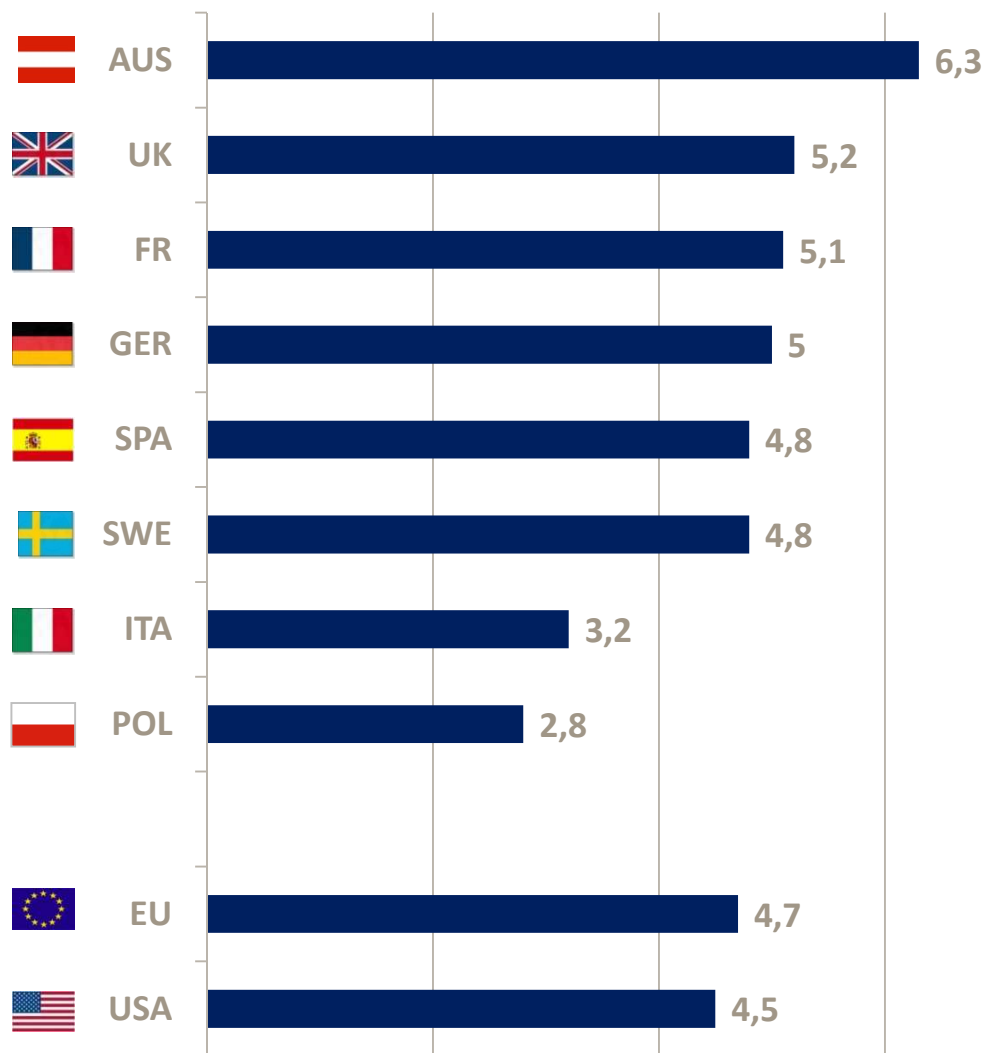
	Total population <i>in millions</i> Source: Eurostat 2011	Sample	Average age <i>years</i>
European Union 27 countries	502 m		
Germany	81.8	500	43.1
France	65.4	500	39.8
Italy	60.9	500	43.0
United Kingdom	62.4	500	39.5
Spain	46.2	500	40.7
Poland	38.2	500	39.1
Sweden	9.5	500	40.6
Austria	8.4	500	41.2
Total of 8 countries studied	372.8	4000	40.9
The 8 countries surveyed represent 74% of the whole of the EU			
	<i>in millions</i> Source: CIA Factbook 2011		<i>years</i>
United States: 50 states	313 m	1000	37.2

Evaluation of the health system and the quality of treatments

Opinion on the healthcare system

How would you assess the organisation of your healthcare system: poor, average, good, very good or excellent?

Calculated by assigning a value to the responses: poor = 1, average = 3.25, good = 5.5, very good = 7.75, excellent = 10

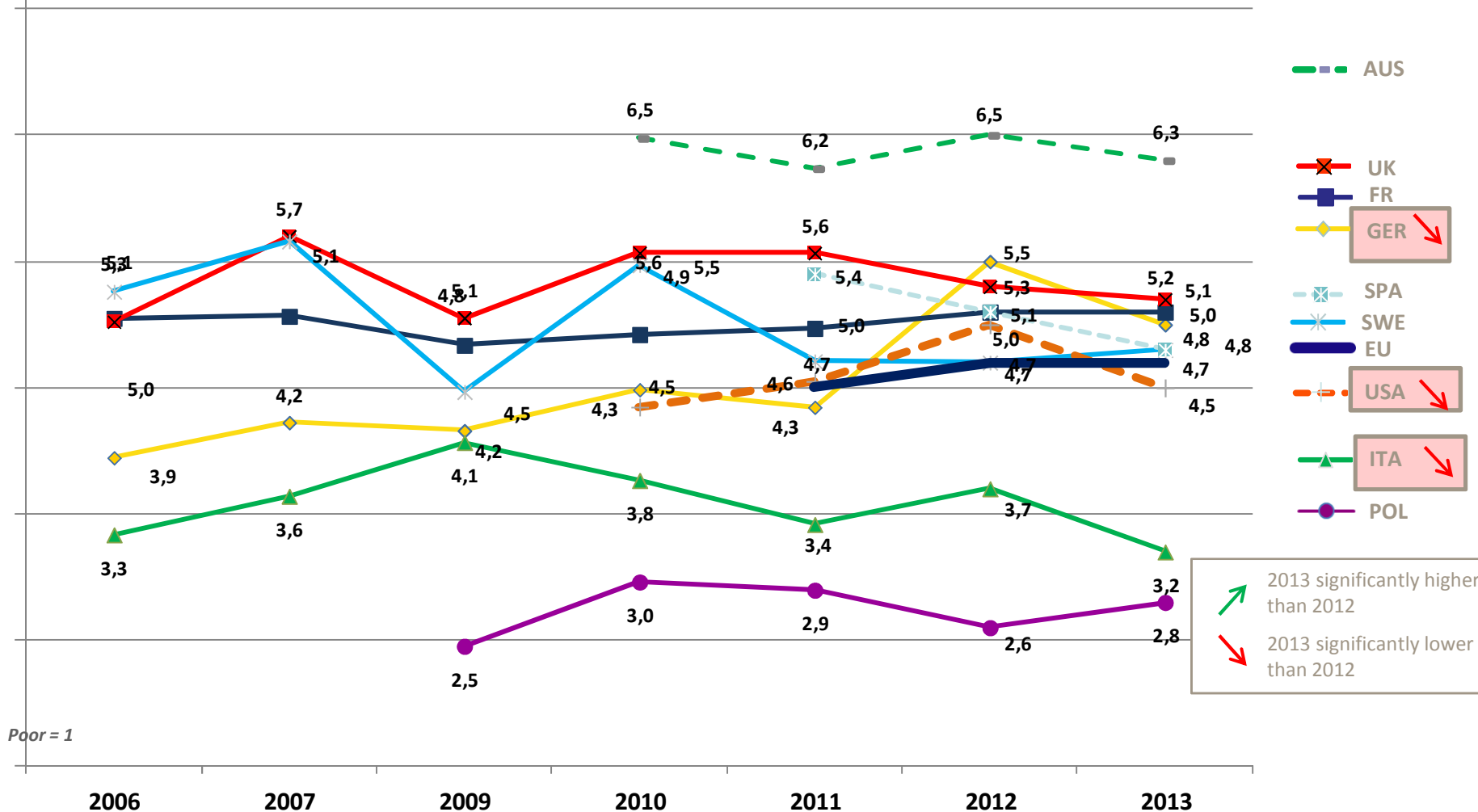


Opinion on the healthcare system – Development 2006-2013

How would you assess the organisation of your healthcare system: poor, average, good, very good or excellent?

Calculated by assigning a value to the responses: poor = 1, average = 3.25, good = 5.5, very good = 7.75, excellent = 10

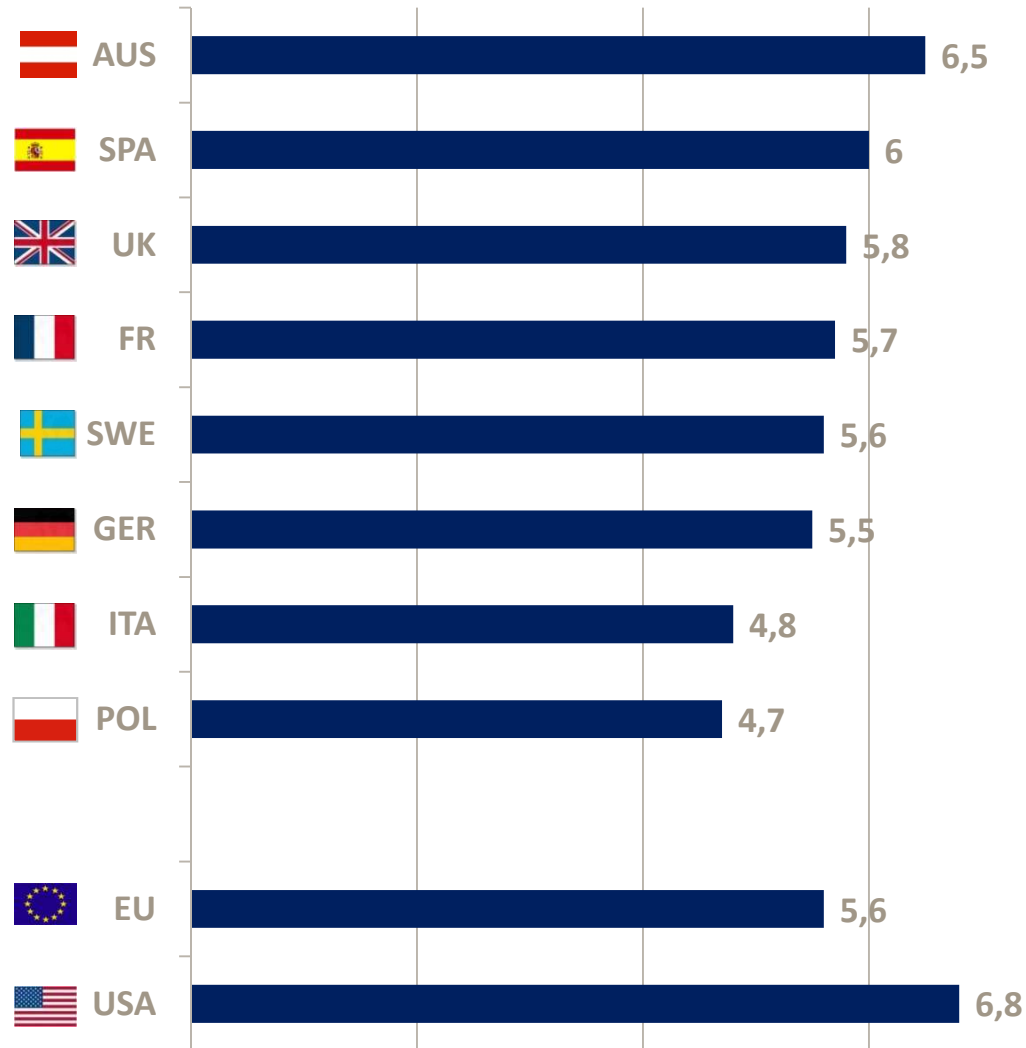
Excellent = 10



Opinion regarding the technical competence of doctors

How would you today assess the technical competence of doctors with regard to diagnostics and treatment: poor, average, good, very good, excellent?

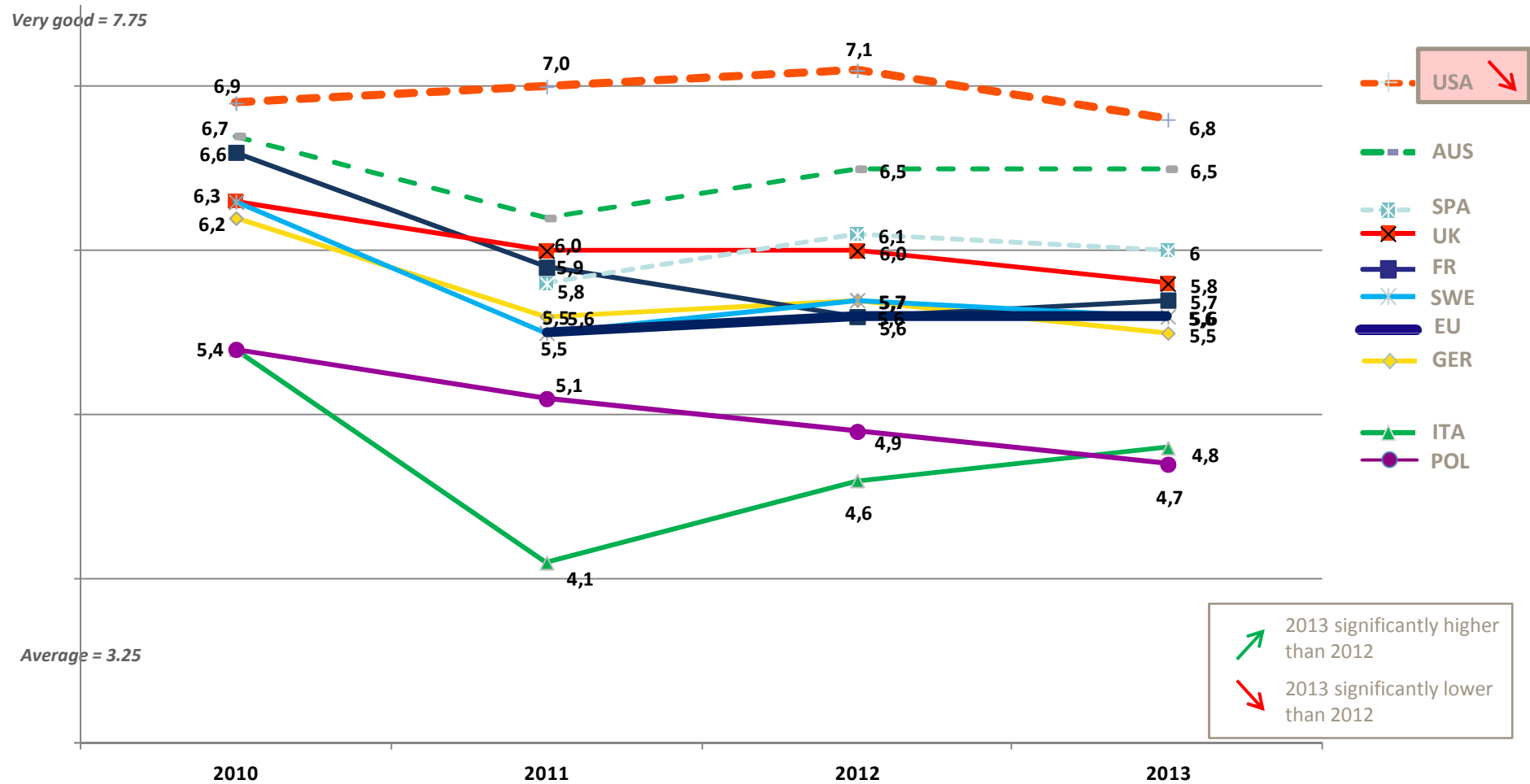
Calculated by assigning a value to the responses: poor = 1, average = 3.25, good = 5.5, very good = 7.75, excellent = 10



Opinion regarding the technical competence of doctors: development 2010-2013

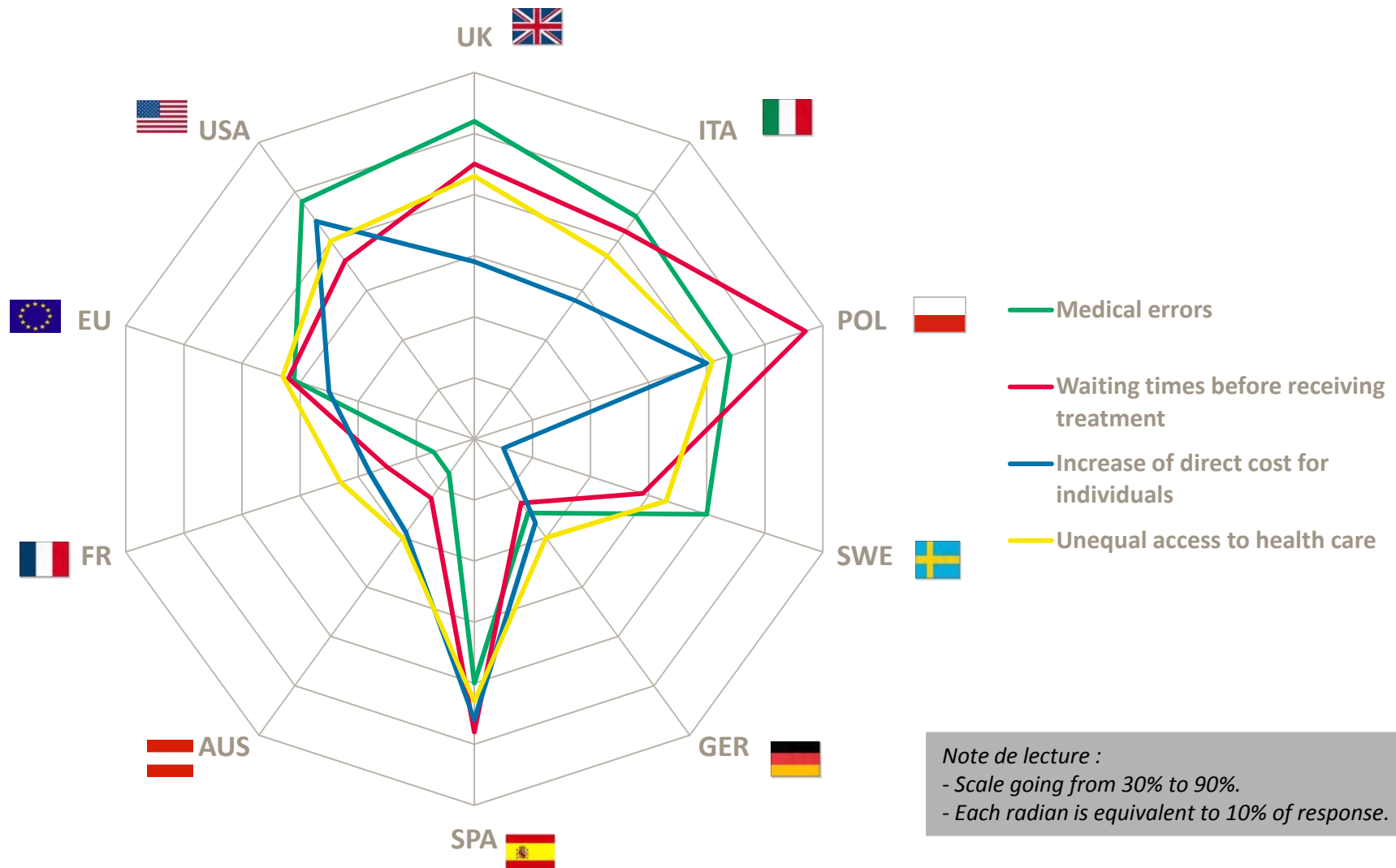
How would you today assess the technical competence of doctors with regard to diagnostics and treatment: poor, average, good, very good, excellent?

Calculated by assigning a value to the responses: poor = 1, average = 3.25, good = 5.5, very good = 7.75, excellent = 10



Perceived threats to the future of the healthcare 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 think this threat is very significant, quite significant, somewhat significant or not at all significant?



Note de lecture :

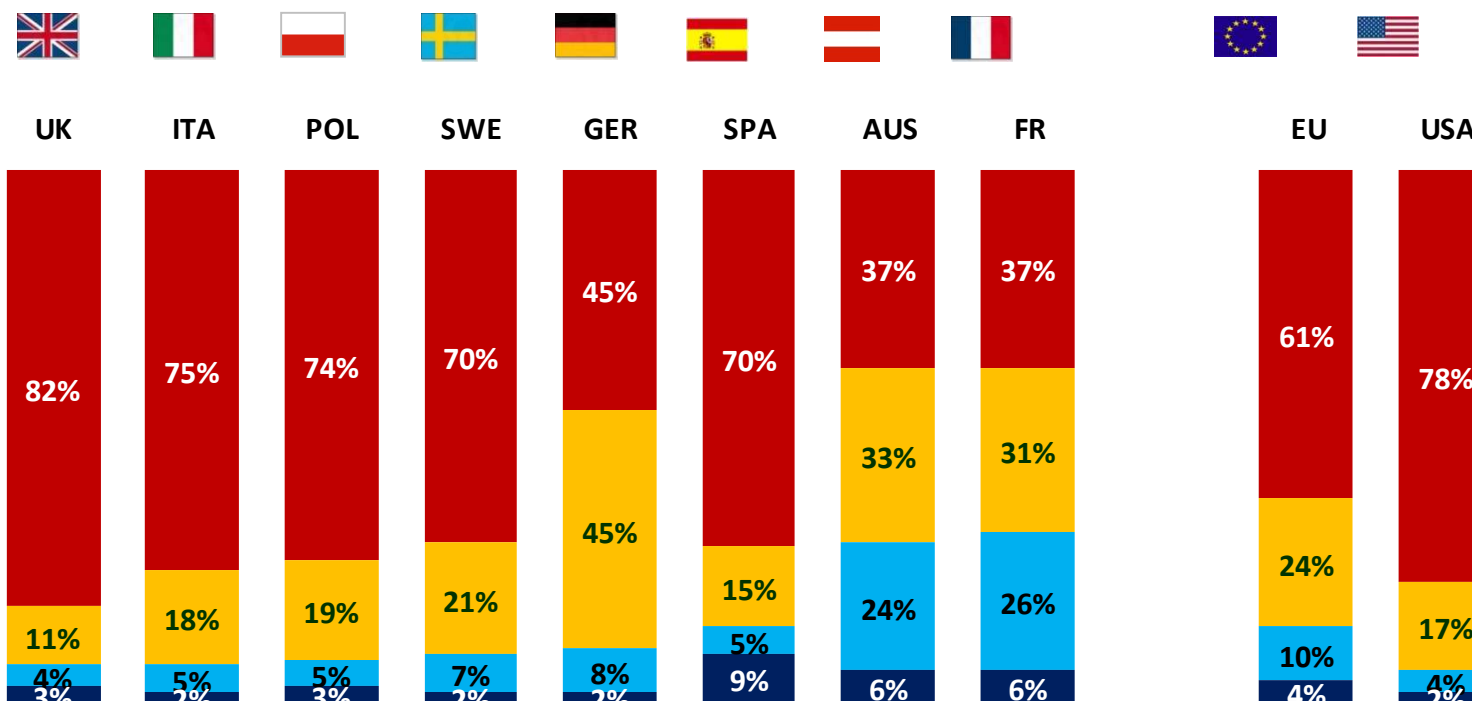
- Scale going from 30% to 90%.
- Each radian is equivalent to 10% of response.

Perceived threats to the future of the healthcare systems

Medical errors

Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?

■ Very important ■ Somewhat important ■ Not really important ■ It is not a threat

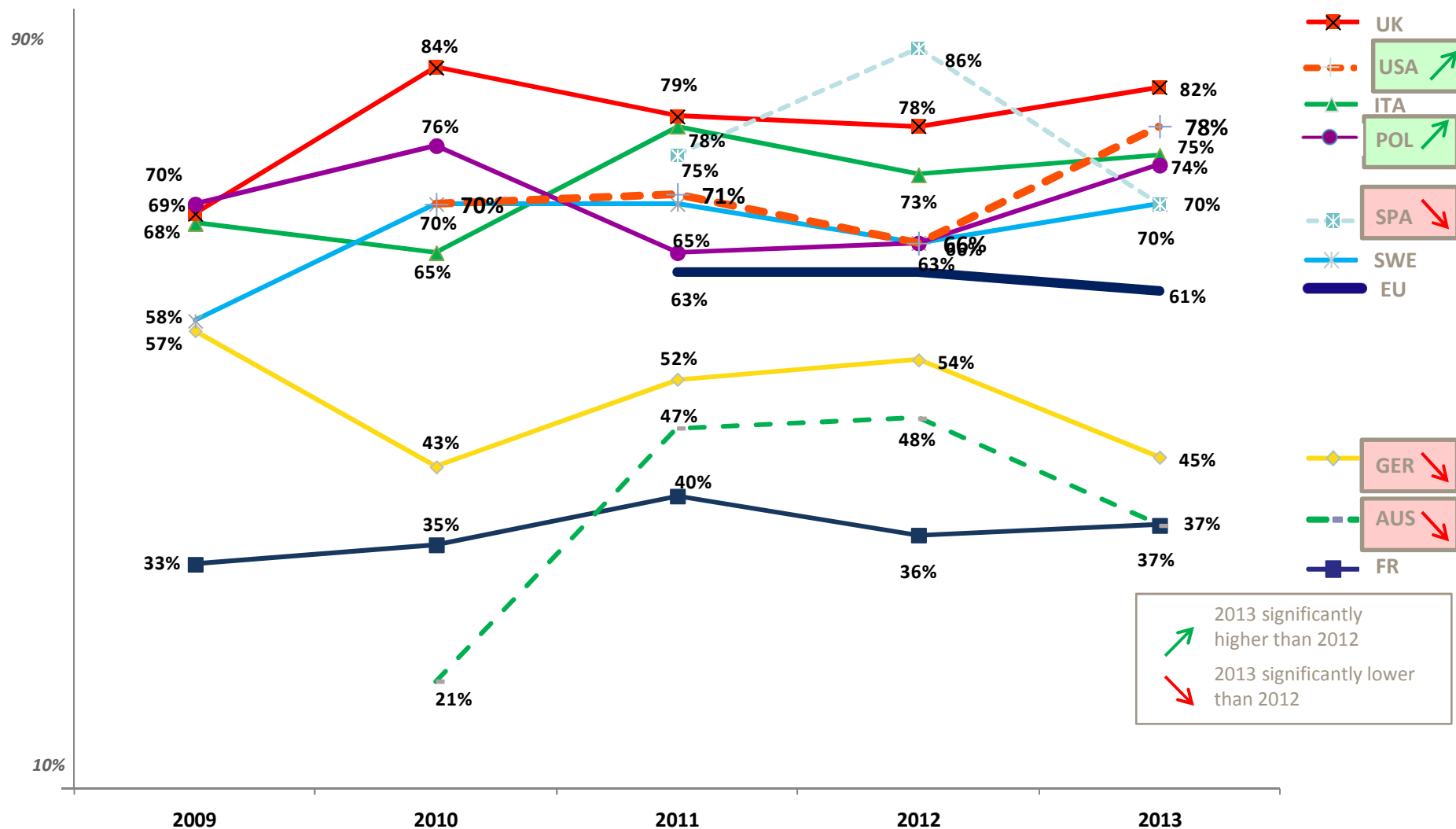


Very / Somewhat important	93%	93%	93%	91%	90%	85%	70%	68%		
Average	9.2	9.0	8.9	8.8	8.0	8.4	7.0	7.0		

85%	95%
8.3	9.1

Perceived threats to the future of the healthcare systems - Development 2009-2013 Medical errors

Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?
Development of "Very important"

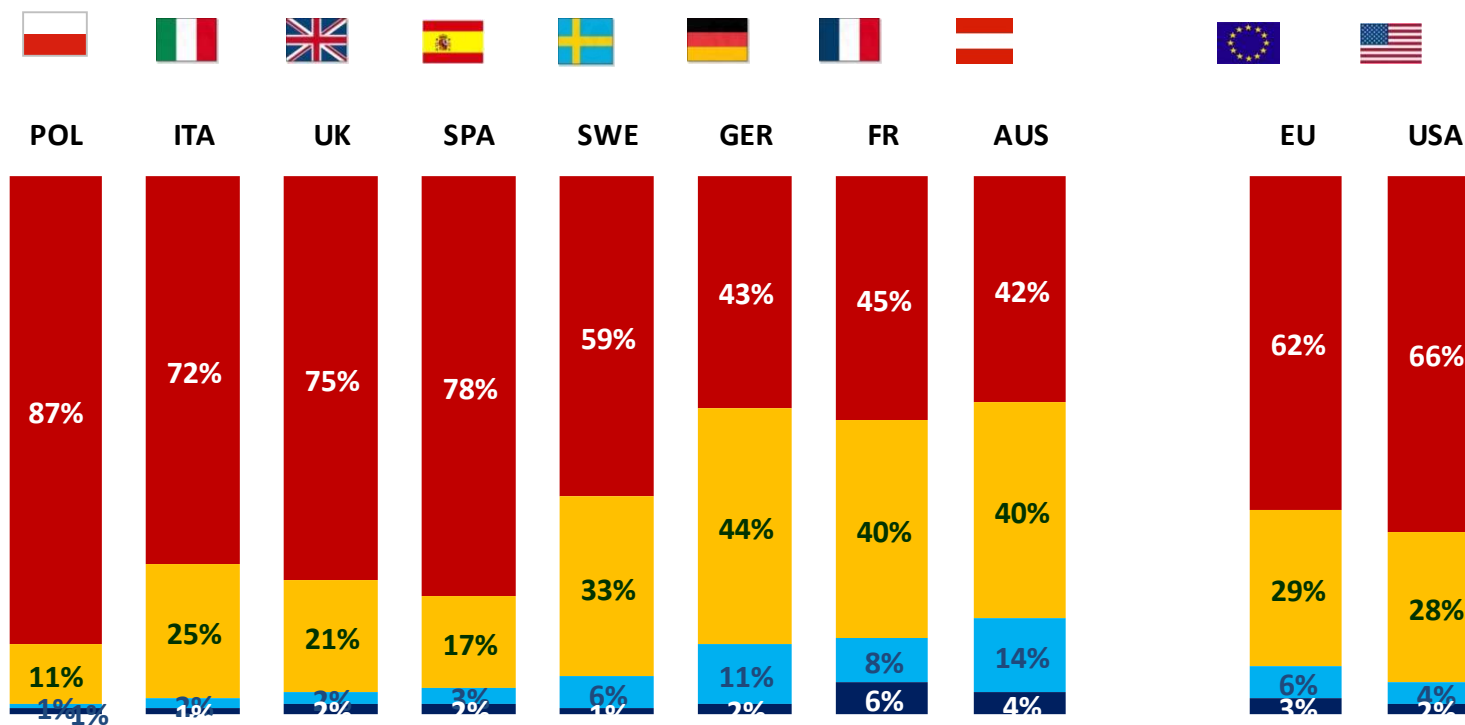


Perceived threats to the future of the healthcare systems

Waiting times prior to receiving treatment

Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?

■ Very important ■ Somewhat important ■ Not really important ■ It is not a threat



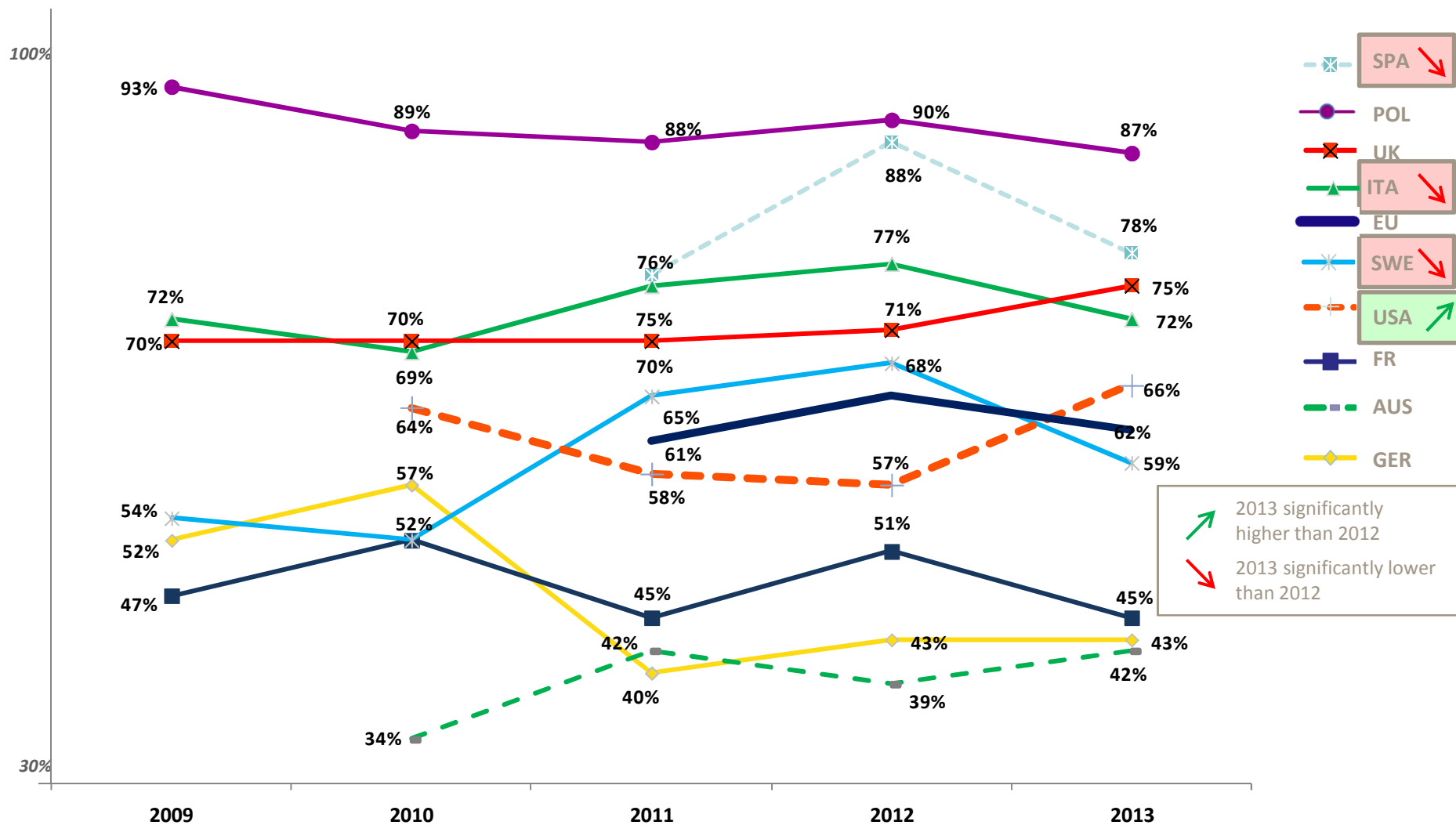
Very / Somewhat important	98%	97%	96%	95%	92%	87%	85%	82%	91%	94%
Average	9.5	9.0	9.0	9.1	8.5	7.9	7.7	7.6	8.5	8.0

Perceived threats to the future of the healthcare systems - Development 2009-2013

Waiting times prior to receiving treatment

Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?

Development of "Very important"

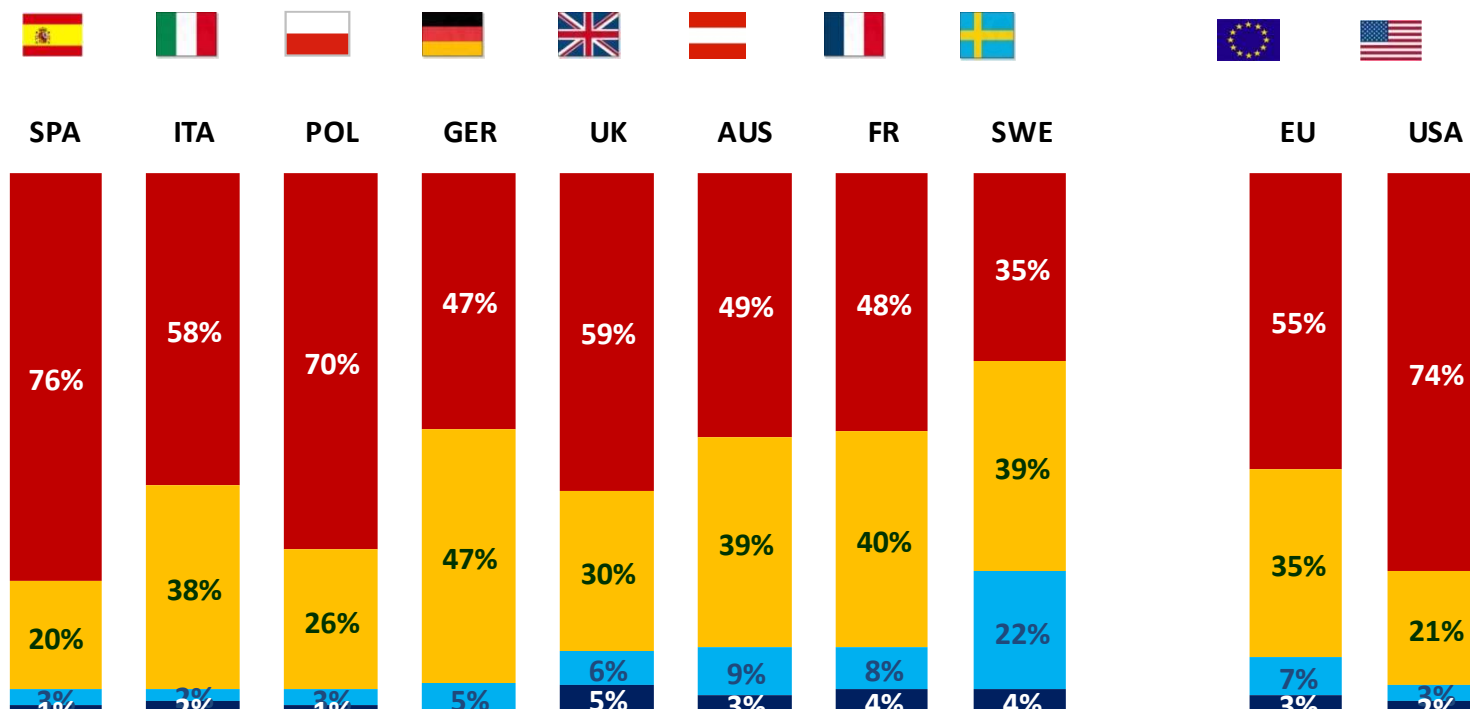


Perceived threats to the future of the healthcare systems

The increase in personal financing

Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?

■ Very important ■ Somewhat important ■ Not really important ■ It is not a threat

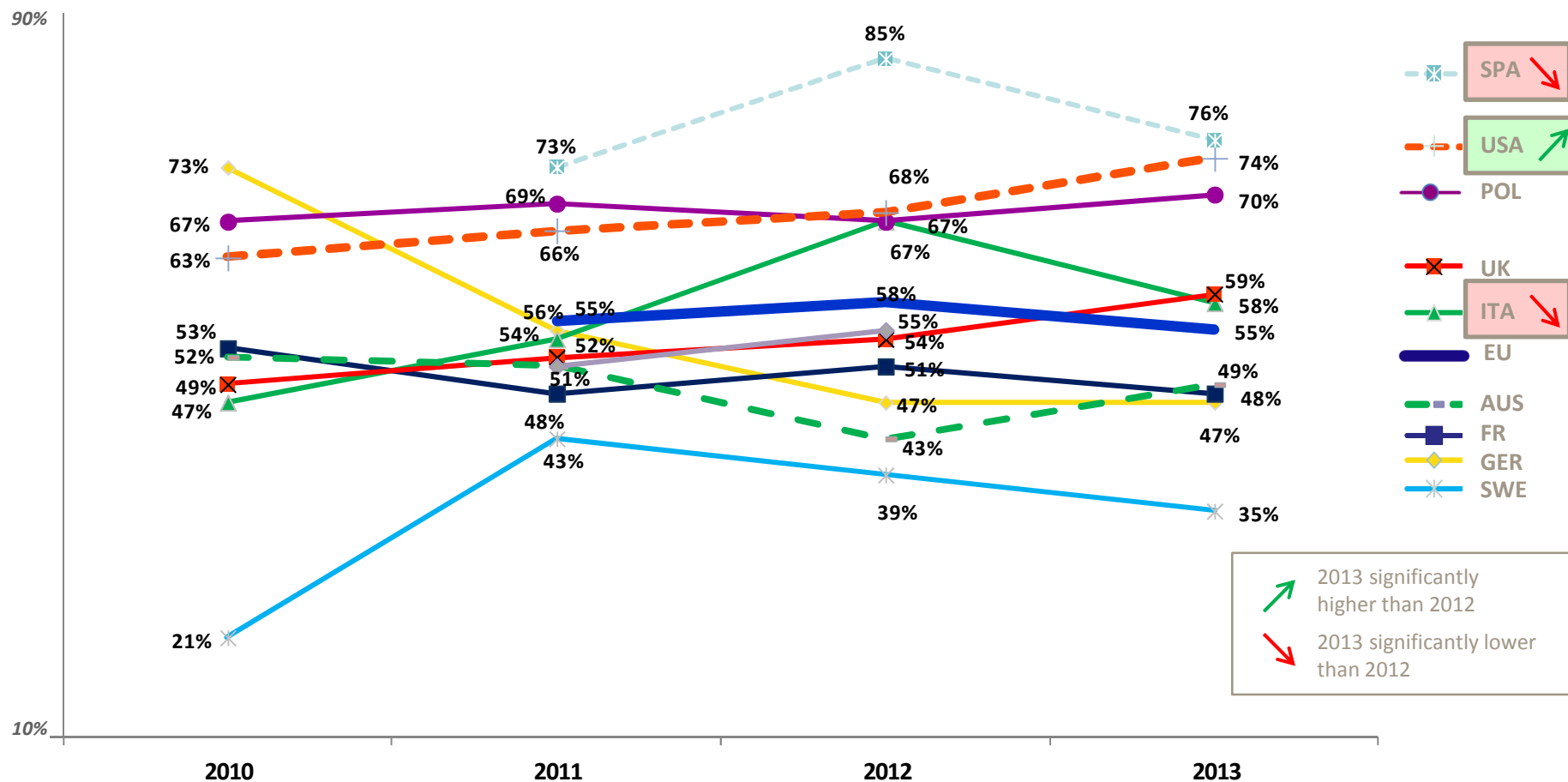


Very / Somewhat important	96%	96%	96%	94%	89%	88%	88%	74%	90%	95%
Average	9.1	8.6	8.9	8.0	8.0	8.0	8.0	7.1	8.0	9.0

Perceived threats to the future of the healthcare systems - Development 2010-2013

The increase in personal financing

Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?
Development of "Very important"

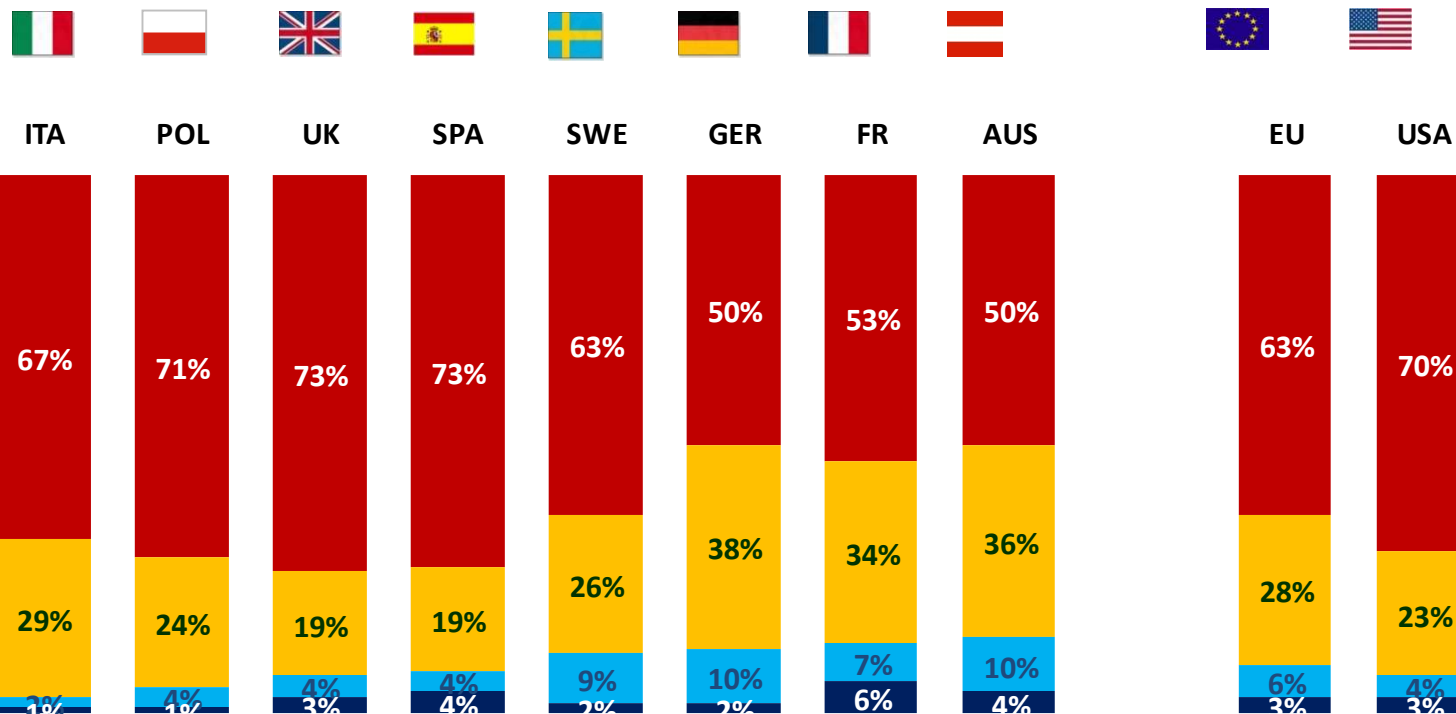


Perceived threats to the future of the healthcare systems

Inequalities in access to treatments

Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?

■ Very important
 ■ Somewhat important
 ■ Not really important
 ■ It is not a threat

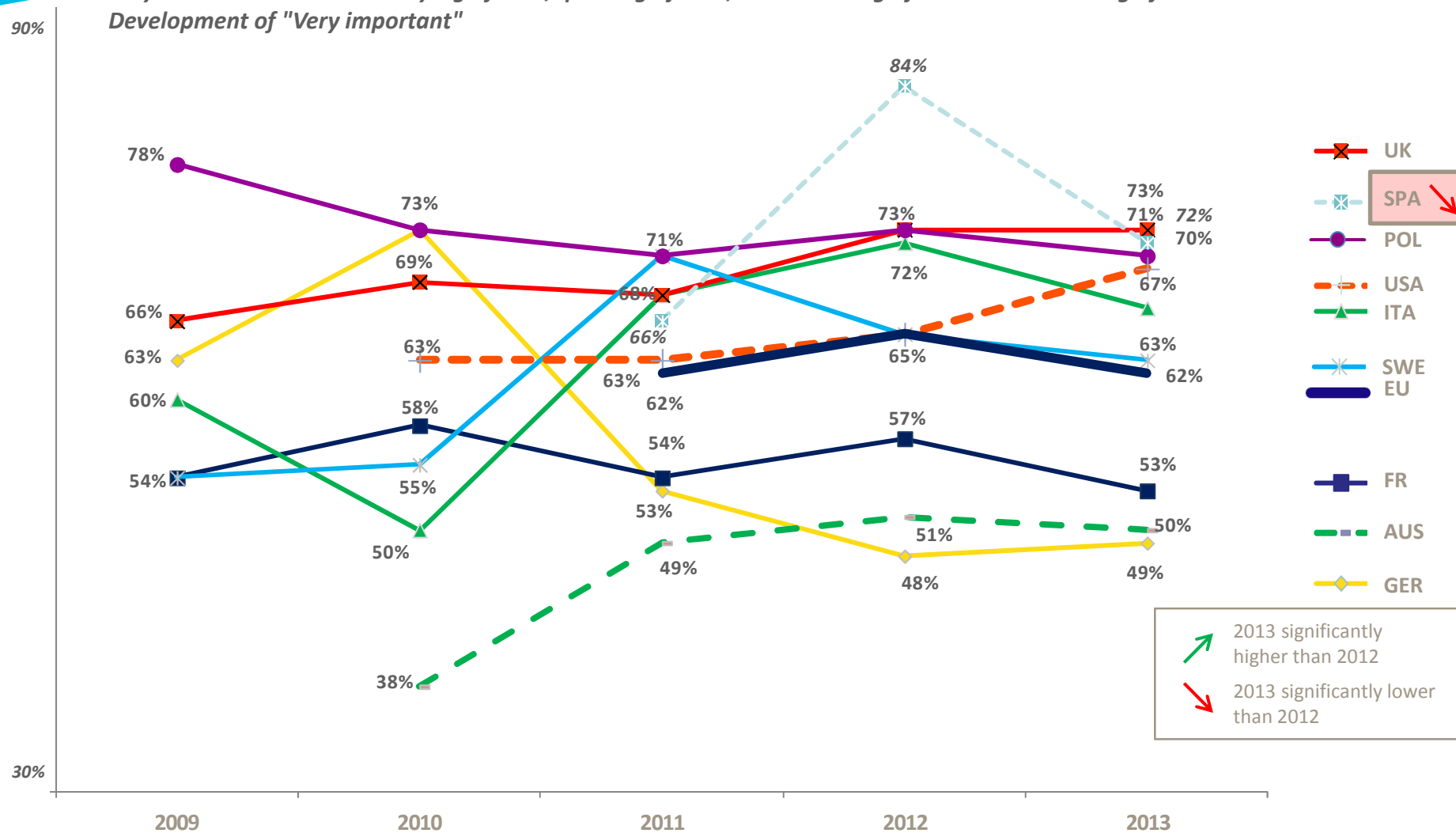


Very / Somewhat important	96%	95%	92%	92%	89%	88%	87%	86%	91%	93%
Average	8.9	8.9	8.9	8.0	8.5	8.1	8.0	4.9	8.5	8.0

Perceived threats to the future of the healthcare systems - Development 2009-2013

Inequalities in access to treatments











Do you think this threat is very significant, quite significant, somewhat significant or not at all significant?
Development of "Very important"



Summary of perceived threats to the future of the healthcare systems

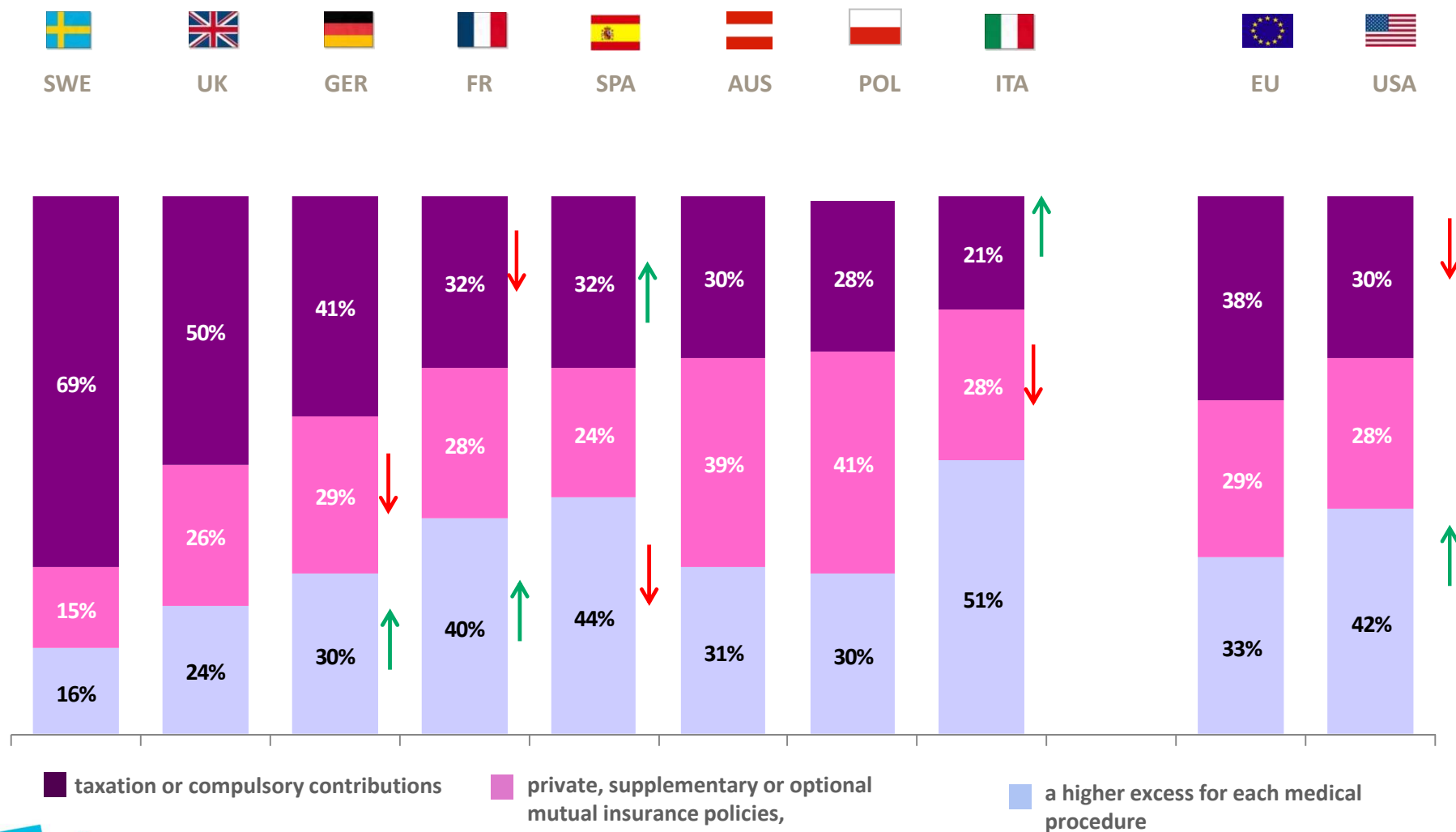
*Over the years to come, our healthcare system will face several threats, which I am going to identify for you:
For each of these, do you think this threat is very significant, quite significant, somewhat significant or not at all significant?*

Sur ST "Very / Somewhat important"

										
	POL	FR	GER	ITA	AUS	SPA	SWE	UK	EU	USA
Medical errors	93%	68%	90%	93%	70%	85%	91%	93%	85%	95%
Waiting times prior to receiving treatment	98%	85%	87%	97%	82%	95%	92%	96%	91%	94%
The increase in personal financing	96%	88%	94%	96%	88%	96%	74%	89%	90%	95%
Inequalities in access to treatments	95%	87%	88%	96%	86%	92%	89%	92%	91%	93%

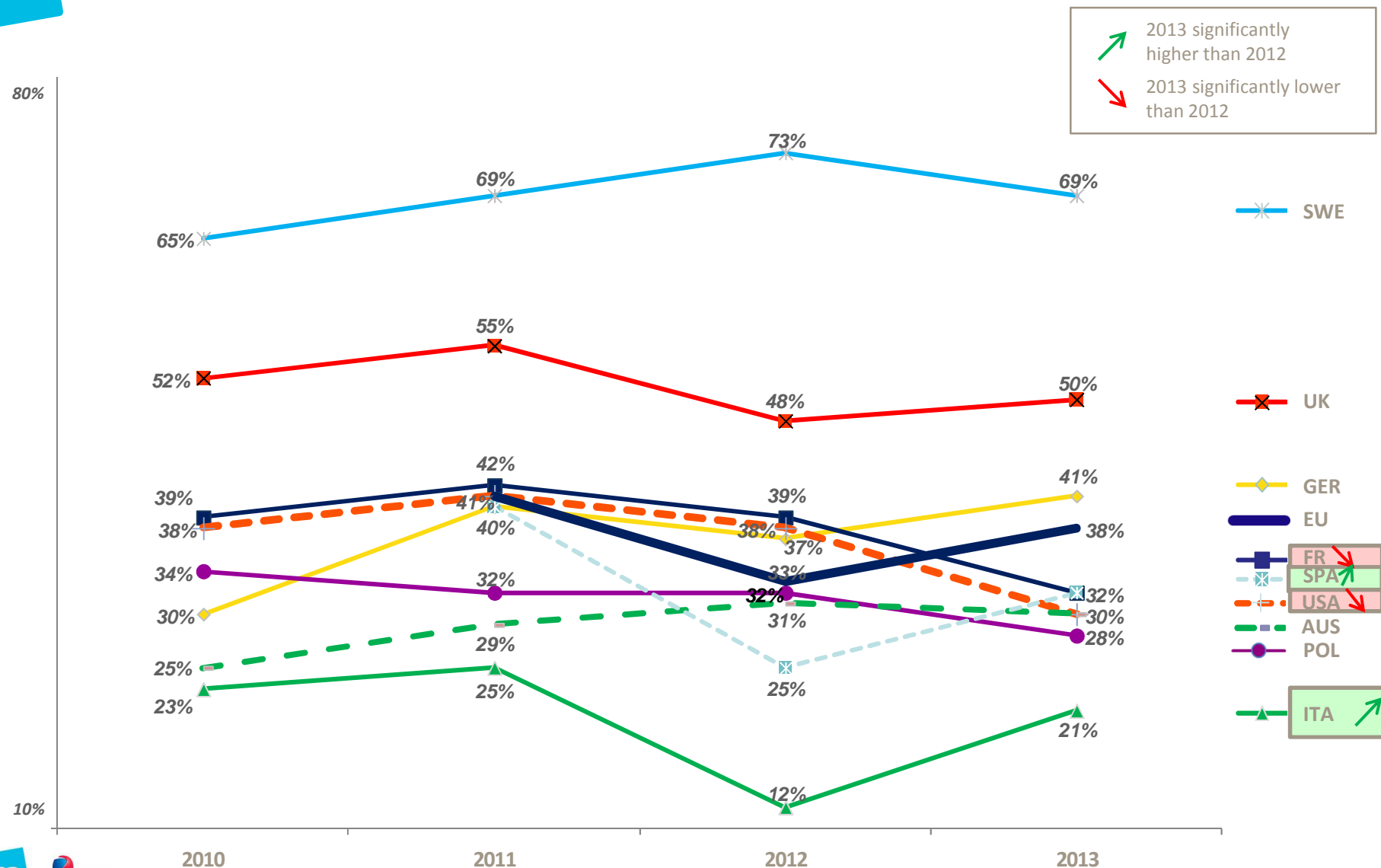
New sources of financing for the future

In order to cover the increase in healthcare expenses, what do you consider to be the best financing solution?



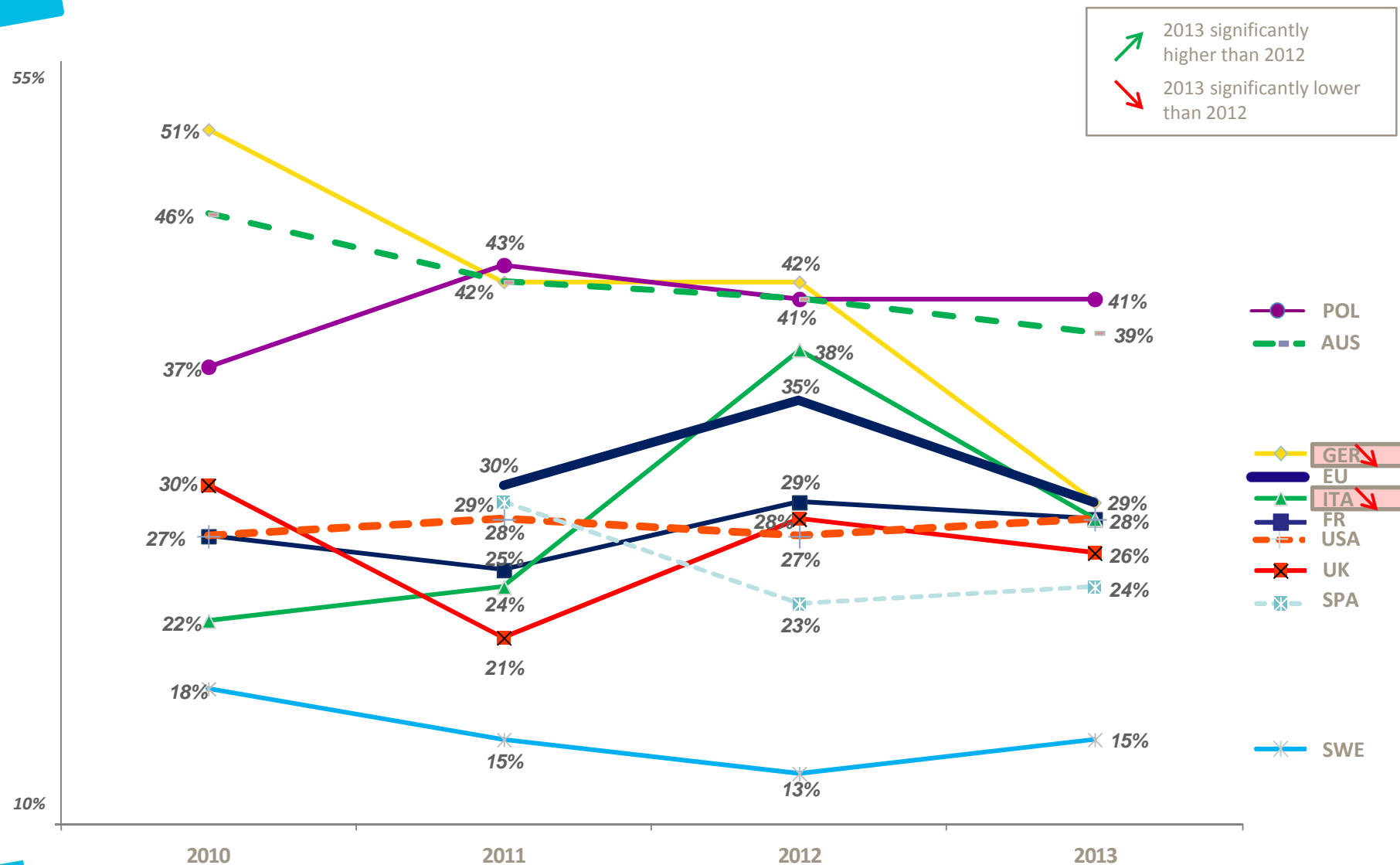
Increasing of the taxations or compulsory contributions to cover the healthcare expenses – Evolution of the perception since 2010

In order to cover the increase in healthcare expenses, what do you consider to be the best financing solution?



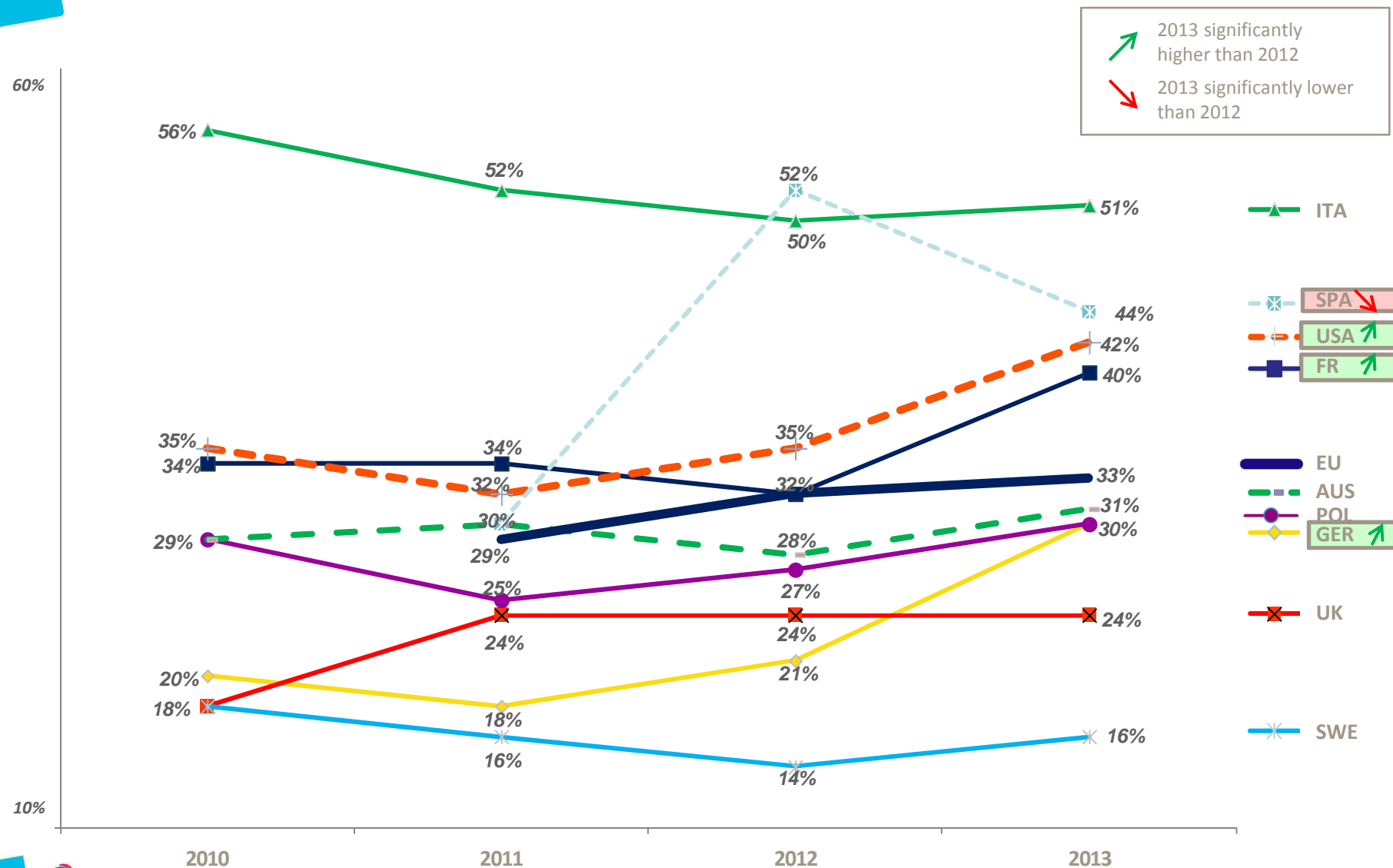
Increasing of the private, supplementary or optional mutual insurance policies to cover the healthcare expenses – Evolution of the perception since 2010

In order to cover the increase in healthcare expenses, what do you consider to be the best financing solution?



Increasing of the excess for each medical procedure to cover the healthcare expenses – Evolution of the perception since 2010

In order to cover the increase in healthcare expenses, what do you consider to be the best financing solution?



Confidence in the healthcare authorities

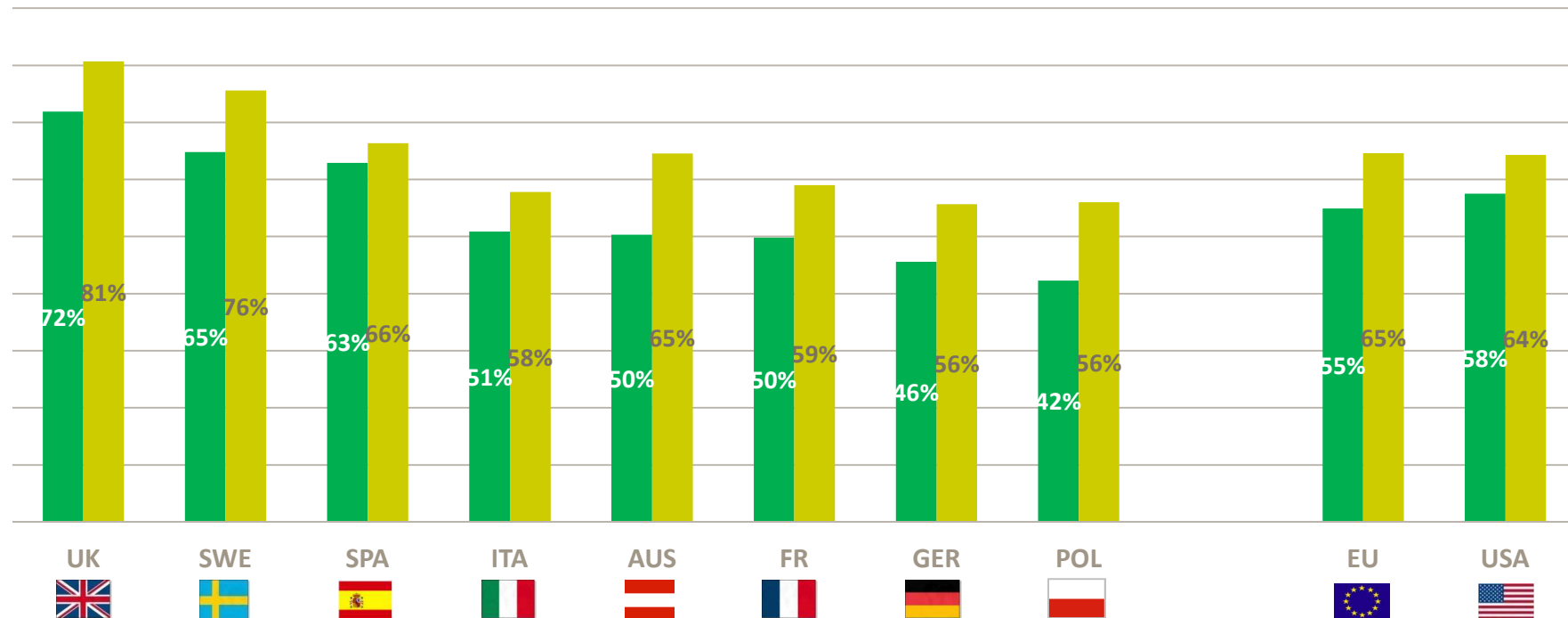
Confidence in the healthcare authorities in 2013

Do you or do you not have confidence in the controls put in place by the healthcare authorities to limit risks

 *associated with the taking of medication?*

 *associated with the use of medical prostheses, probe implants and endoscope equipment...?*

% of "yes" responses

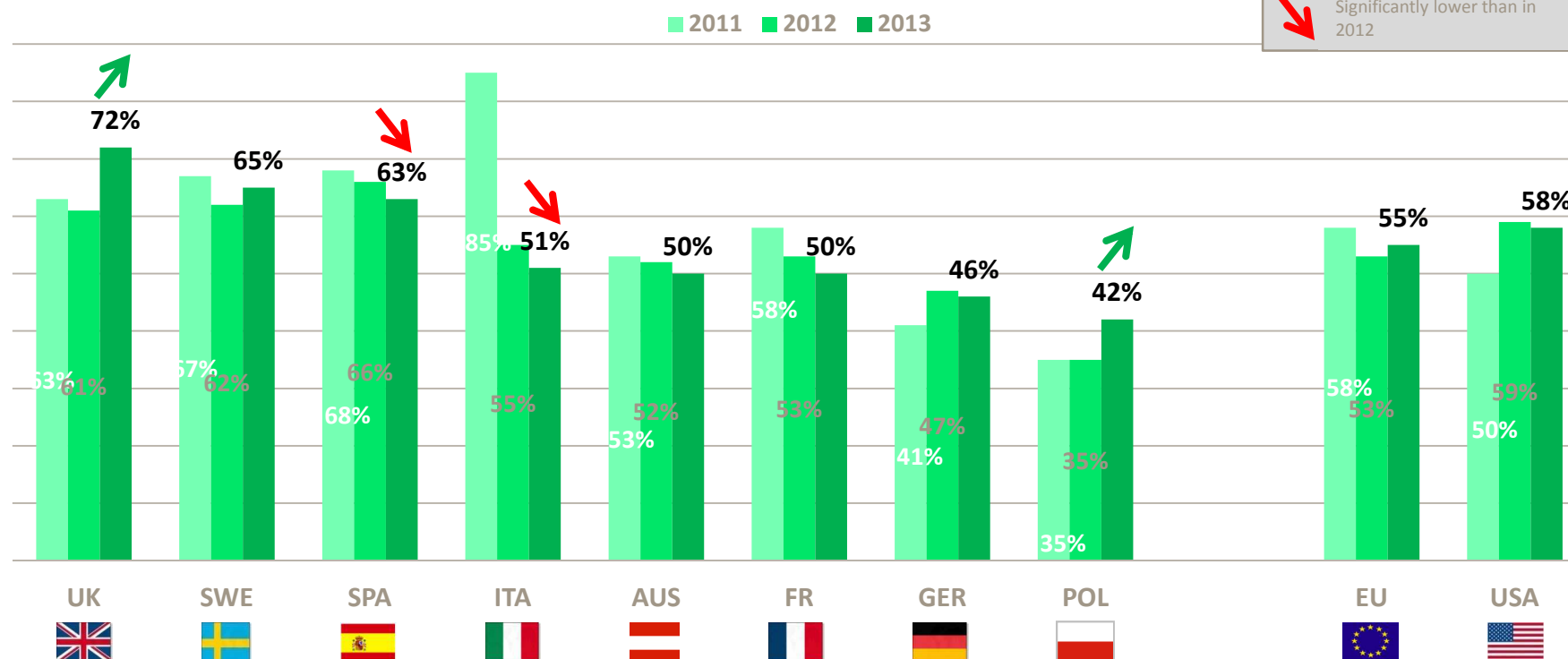


Confidence in the healthcare authorities - developments

Do you or do you not have confidence in the controls put in place by the healthcare authorities to limit risks

associated with the taking of medication?

% of "yes" responses - developments since 2011

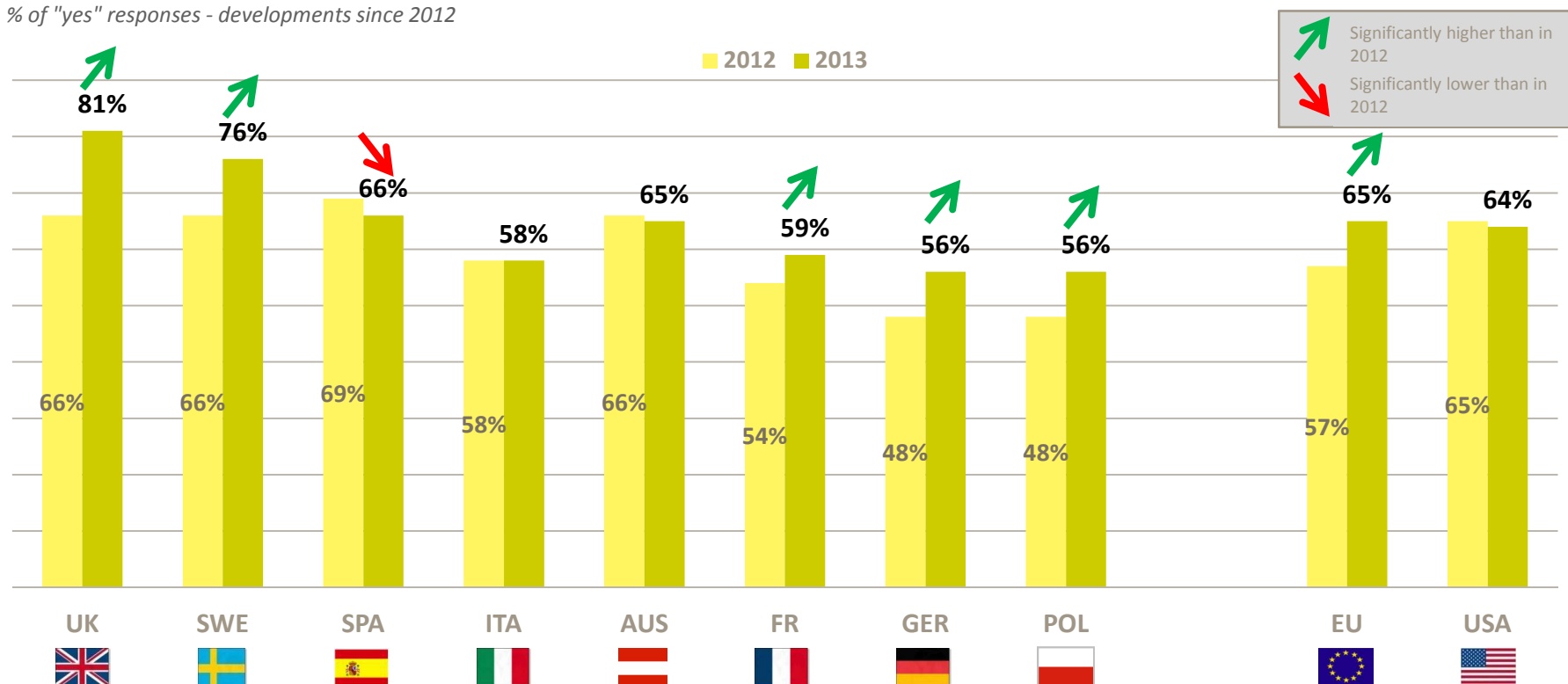


Confidence in the healthcare authorities - developments

Do you or do you not have confidence in the controls put in place by the healthcare authorities to limit risks

associated with the use of medical prostheses, probe implants and endoscope equipment...?

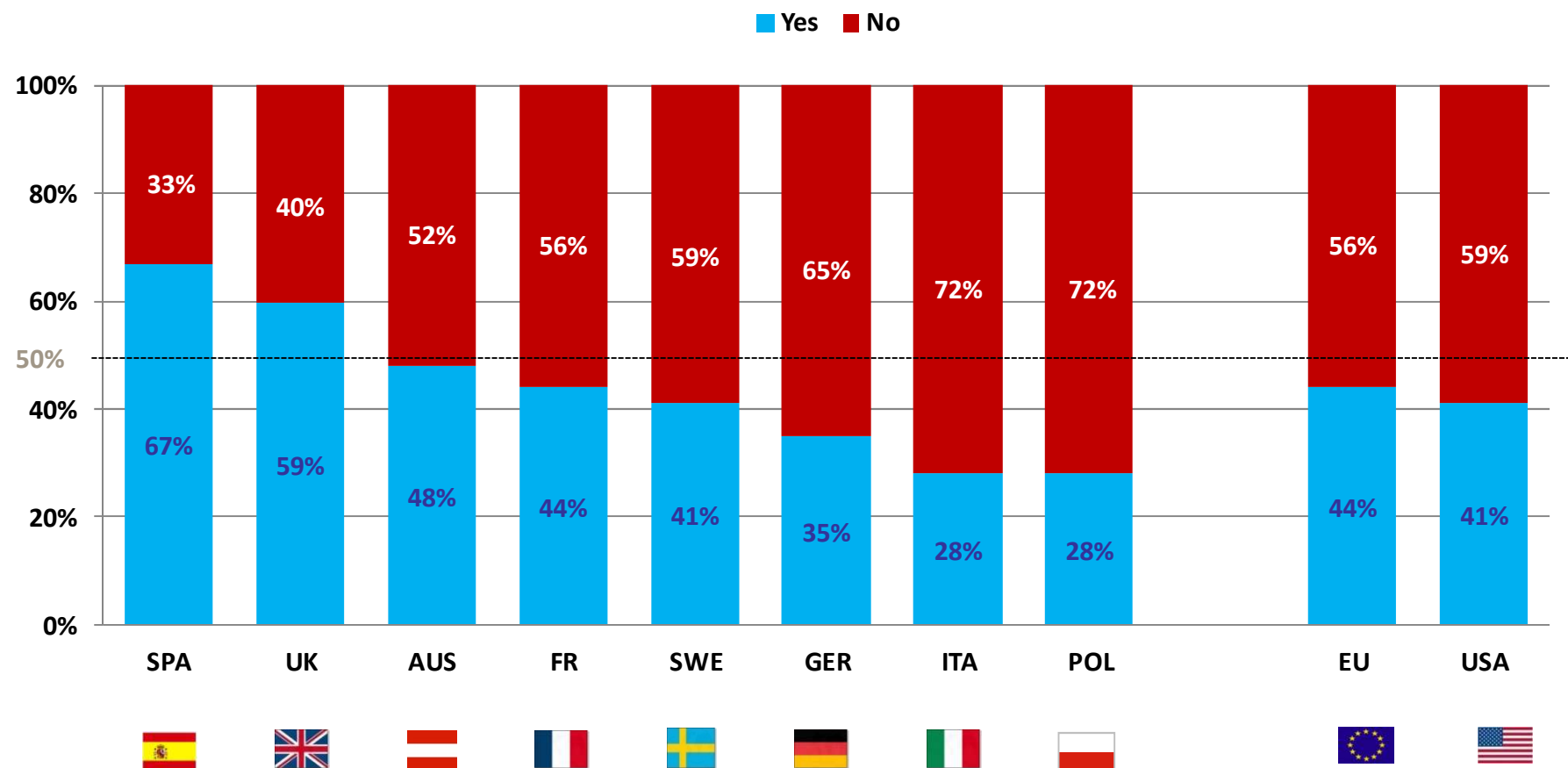
% of "yes" responses - developments since 2012



Social requirements

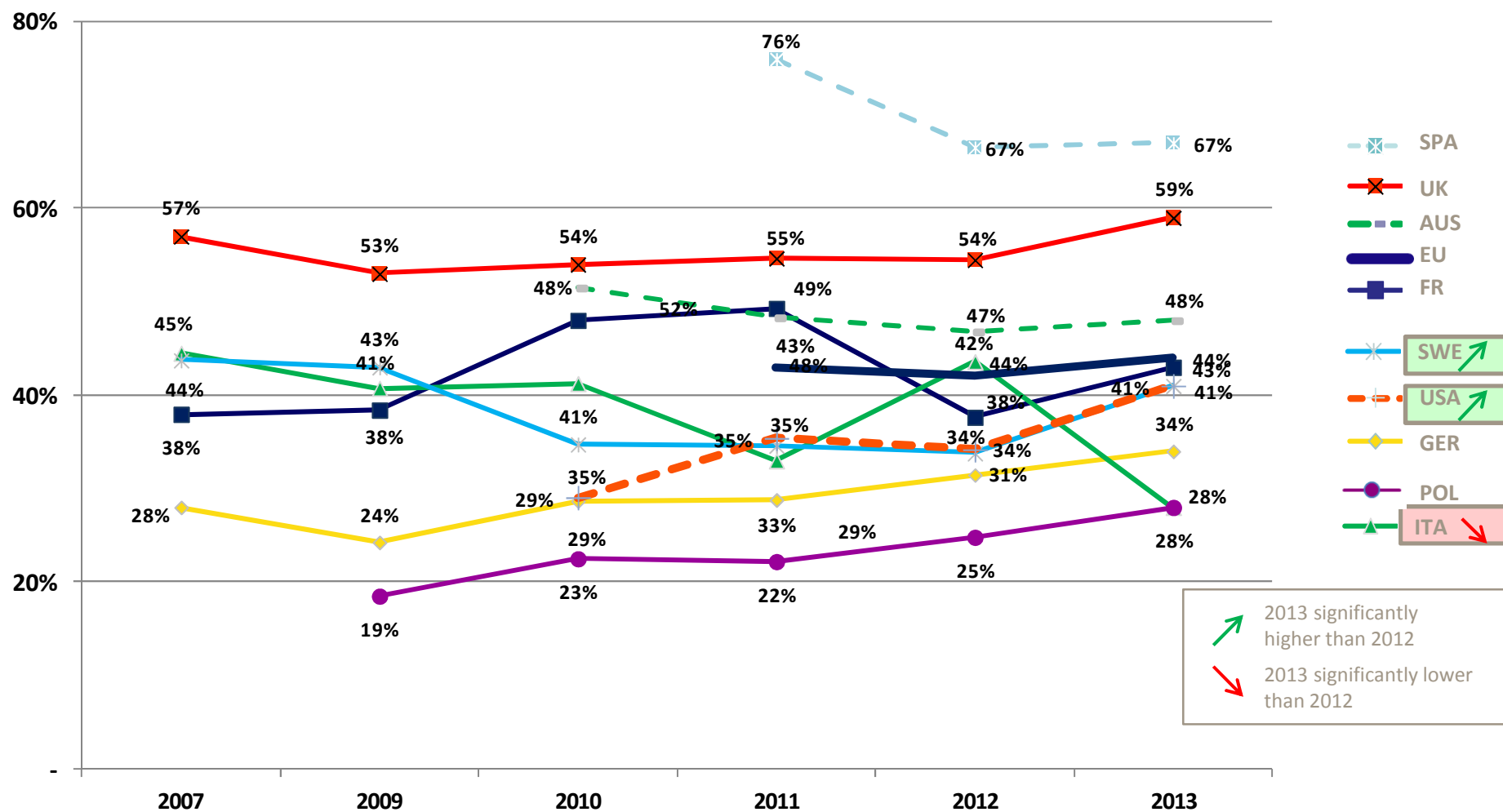
Evaluation of the equality of access to treatments

In your opinion, does the current healthcare system guarantee equal access to medical treatments for all citizens?



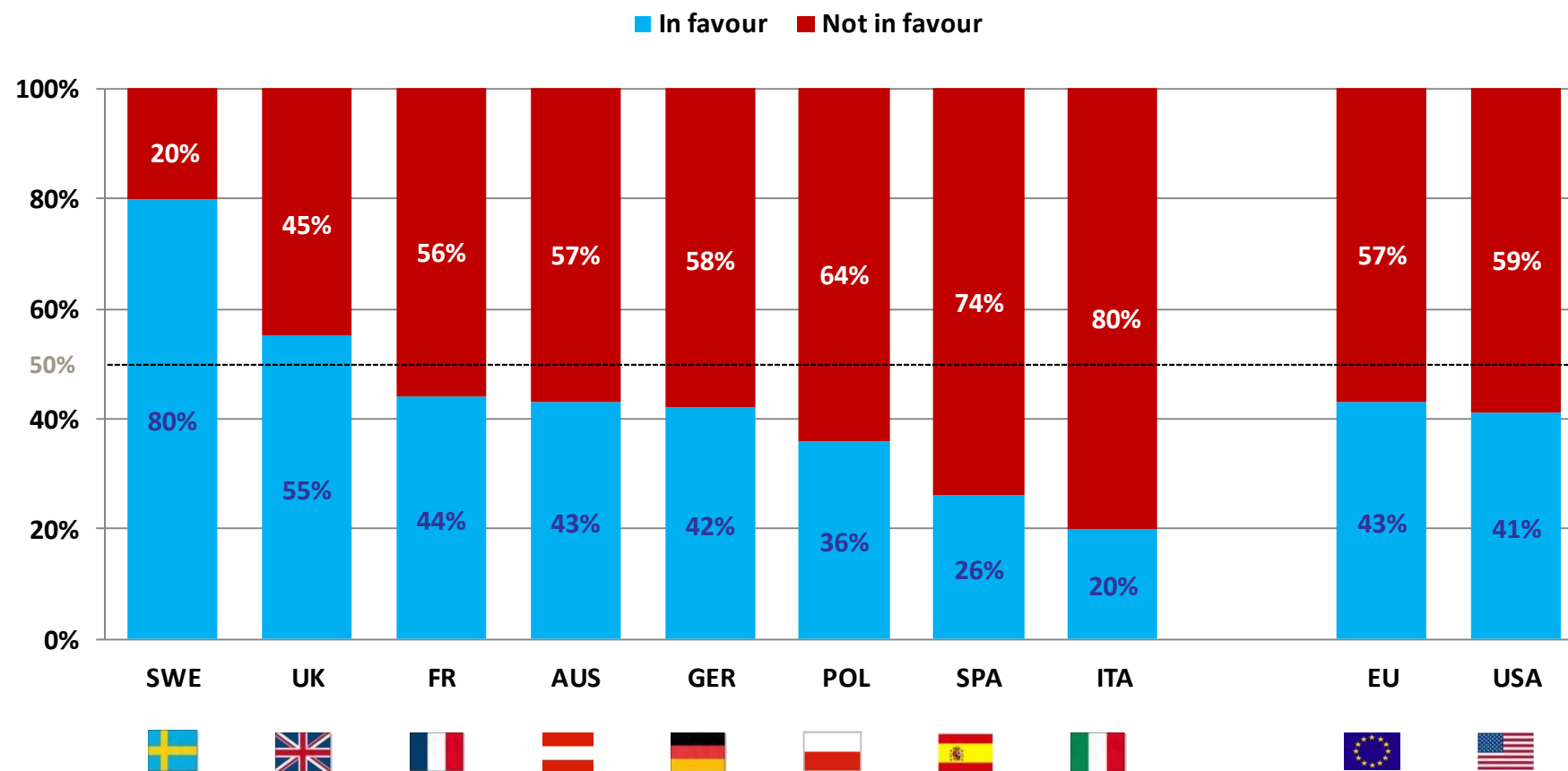
Evaluation of the equality of access to treatments - Development since 2007

In your opinion, does the current healthcare system guarantee equal access to medical treatments for all citizens? Development in the equality of access to treatments since 2007 (% of "yes" responses)



Financing the equality of access to treatments through taxation

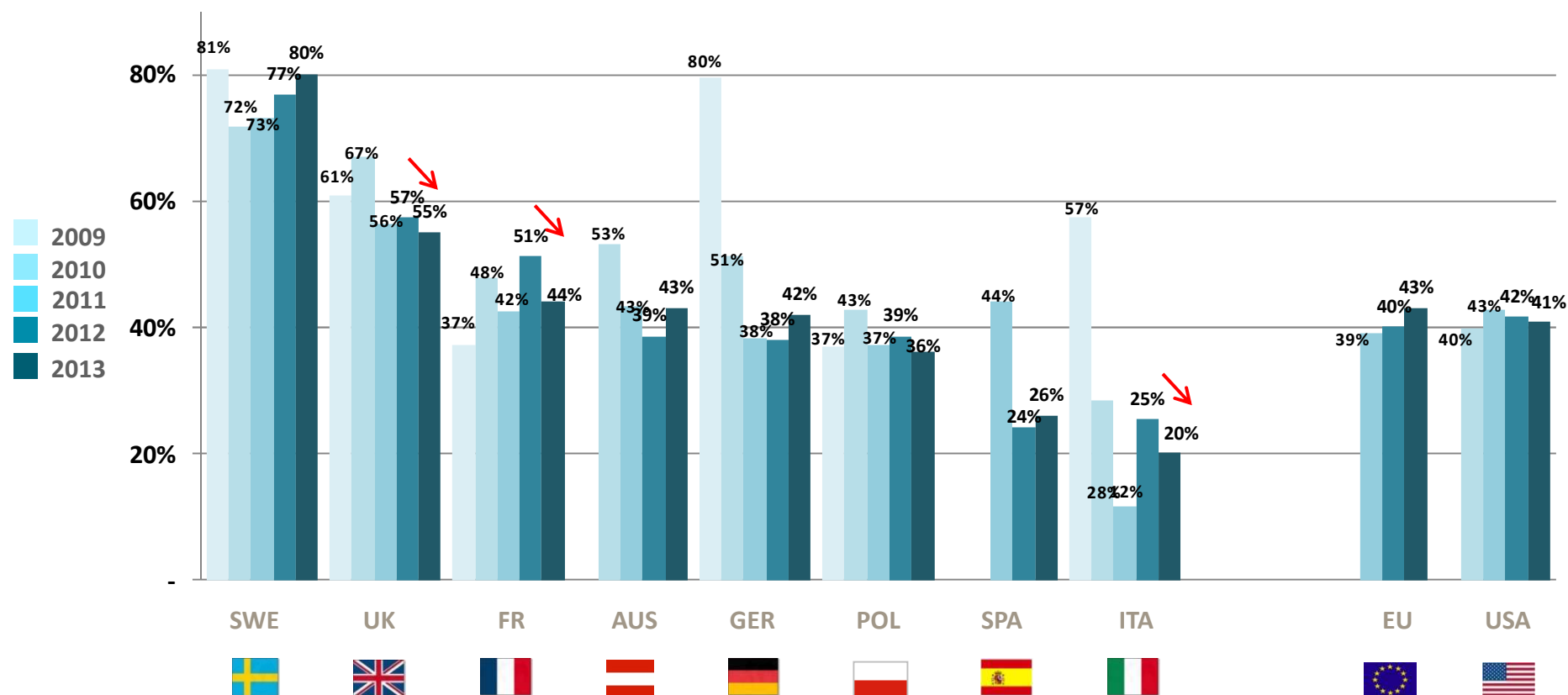
In order to reinforce equality of access to medical treatments, are you or are you not in favour of an increase in taxes or compulsory contributions?



Financing the equality of access to treatments through taxation - Development

In order to reinforce equality of access to medical treatments, are you or are you not in favour of an increase in taxes or compulsory contributions?

Development between 2009 and 2013 of the % of "In favour" responses.

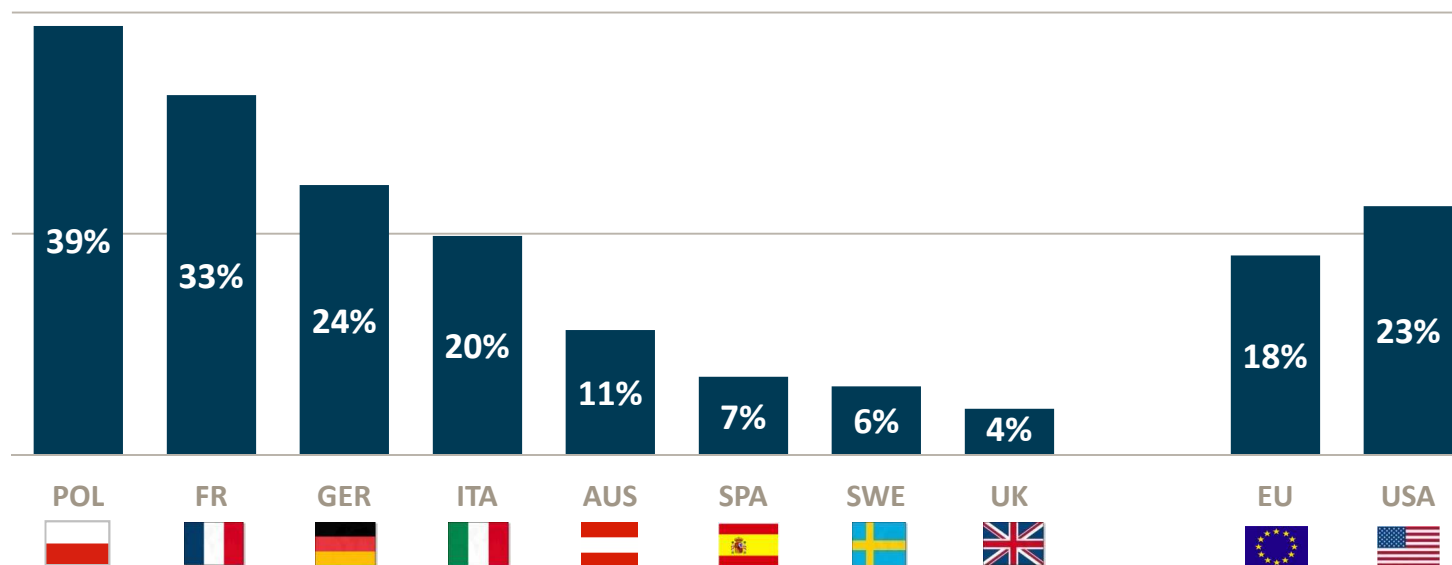


Cancellation of treatments

The cancellation of treatments in 2013

Throughout the course of the past year, have you cancelled or postponed medical treatments for yourself or a member of your household on account of financial difficulties?

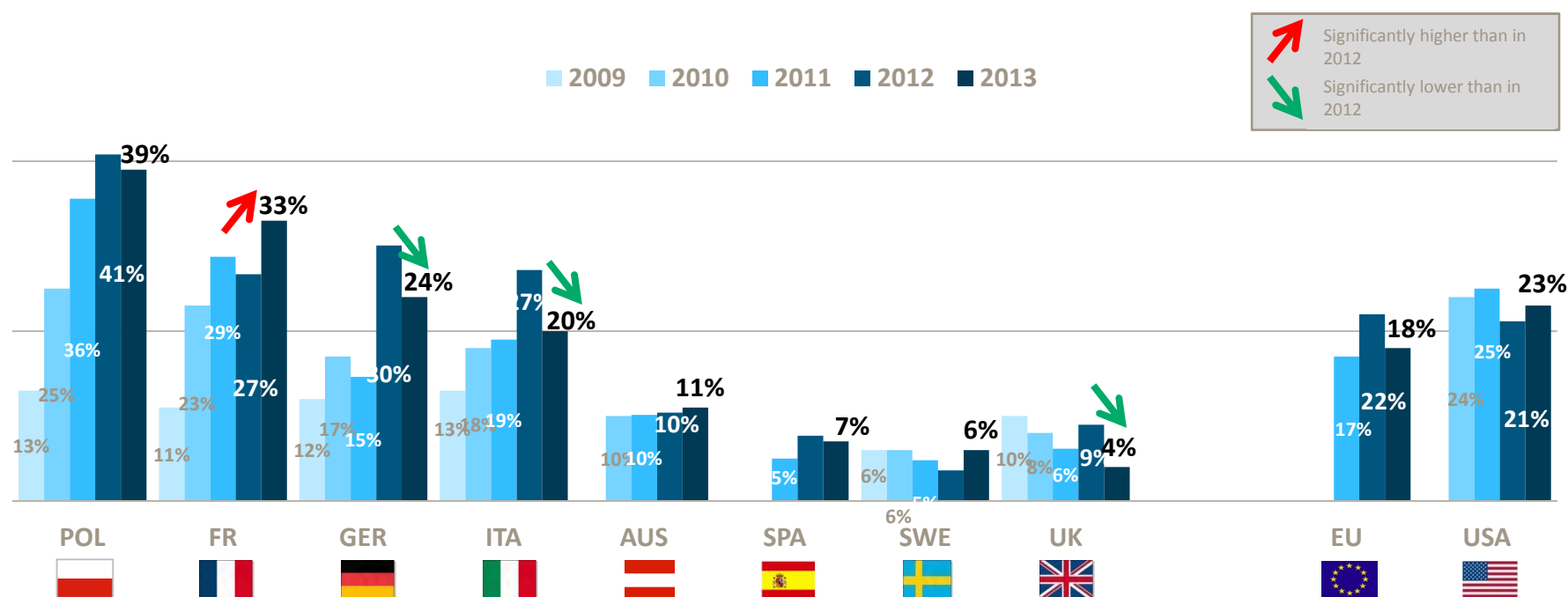
% of "yes" responses



Development regarding the cancellation of treatments

Throughout the course of the past year, have you cancelled or postponed medical treatments for yourself or a member of your household on account of financial difficulties?










Development between 2009 and 2013 of the % of "yes" responses.



The cancellation of treatments in 2013

Throughout the course of the past year, have you cancelled or postponed medical treatments for yourself or a member of your household on account of financial difficulties?

Significant cross-tabulations for "% yes"

	More postponements or cancellations of treatments	Less postponements or cancellations of treatments
	Gender: Female (41%) Age: 18 to 39 (40%) Status: Active (36%)	Gender: Male (23%) Age: 60 years old and above (22%) Status: Inactive (27%)
	++	--
	Gender: Male (30%) Age: 18 to 39 (36%) Status: Active (32%)	Gender: Female (19%) Age: 60 years old and above (12%) Status: Inactive (15%)
	++	--
	Gender: Female (25%) Age: 18 to 39 (28%) Status: Active (25%) Health insurance coverage: Not Insured (60%)	Gender: Male (20%) Age: 60 years old and above (16%) Status: Inactive (18%) Health insurance coverage: Employer-based (18%)
	Health insurance coverage: Not insured (55%)	Health insurance coverage: Insured (19%)
	Gender: Female (23%)	Gender: Male (16%)
	++	--
	Gender: Female (14%)	Gender: Male (8%)
	++	--
	Health insurance coverage: No health insurance coverage (13%)	Age: 60 years old and above (2%)
	No major difference	
	No major difference	
	No major difference	

The cancellation of treatments in 2013

Focus on USA, according to the type of health insurance coverage

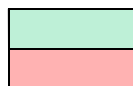


Throughout the course of the past year, have you cancelled or postponed medical treatments for yourself or a member of your household on account of financial difficulties?

% of "yes" responses. Distribution according to the health insurance system

	All	Employer-based	Self-purchased / Self-insured	Medicare	Medicaid	Not Insured	Military
% Yes	23%	<u>18%</u>	30%	21%	44%	60%	11%

Key



The result is significantly and statistically higher than that of the whole











The result is significantly and statistically lower than that of the whole

The cancellation of treatments in 2013 : detail

What type of treatment was it?

Several answers possible

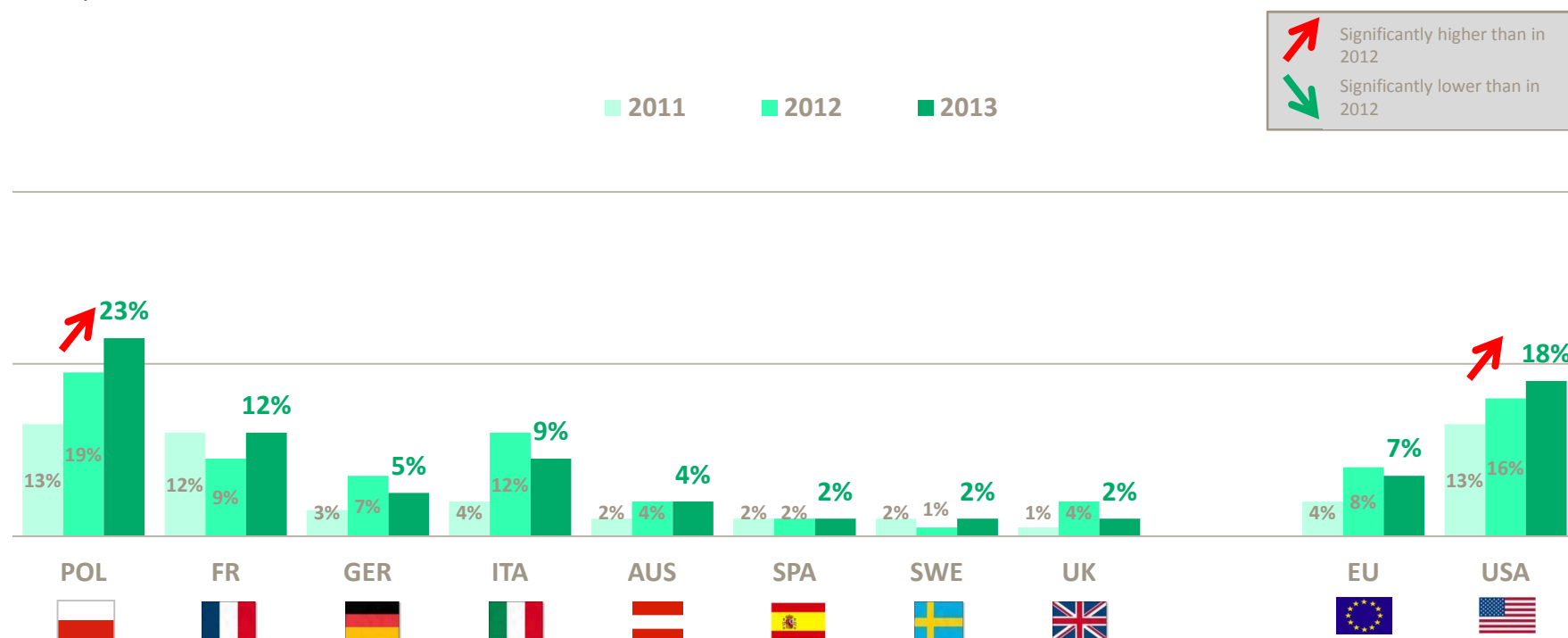
Basis: spontaneous answers

	 POL	 FR	 GER	 ITA	 AUS	 SPA	 SWE	 UK	 EU	 USA
Routine treatments: consultation with a GP or specialist	23%	12%	5%	9%	4%	2%	2%	2%	7%	18%
Intensive treatments: surgical operations, examinations or expensive procedures	13%	7%	7%	6%	5%	2%	1%	2%	5%	16%
Purchase of medication	16%	7%	13%	5%	3%	2%	1%	1%	6%	10%
Dental treatments	17%	25%	14%	10%	7%	3%	3%	2%	10%	14%
Purchase of corrective glasses or lenses	12%	17%	10%	4%	5%	2%	1%	1%	6%	10%

Cancellations of routine treatments - Developments

Have cancelled or postponed routine medical treatments on account of financial difficulties

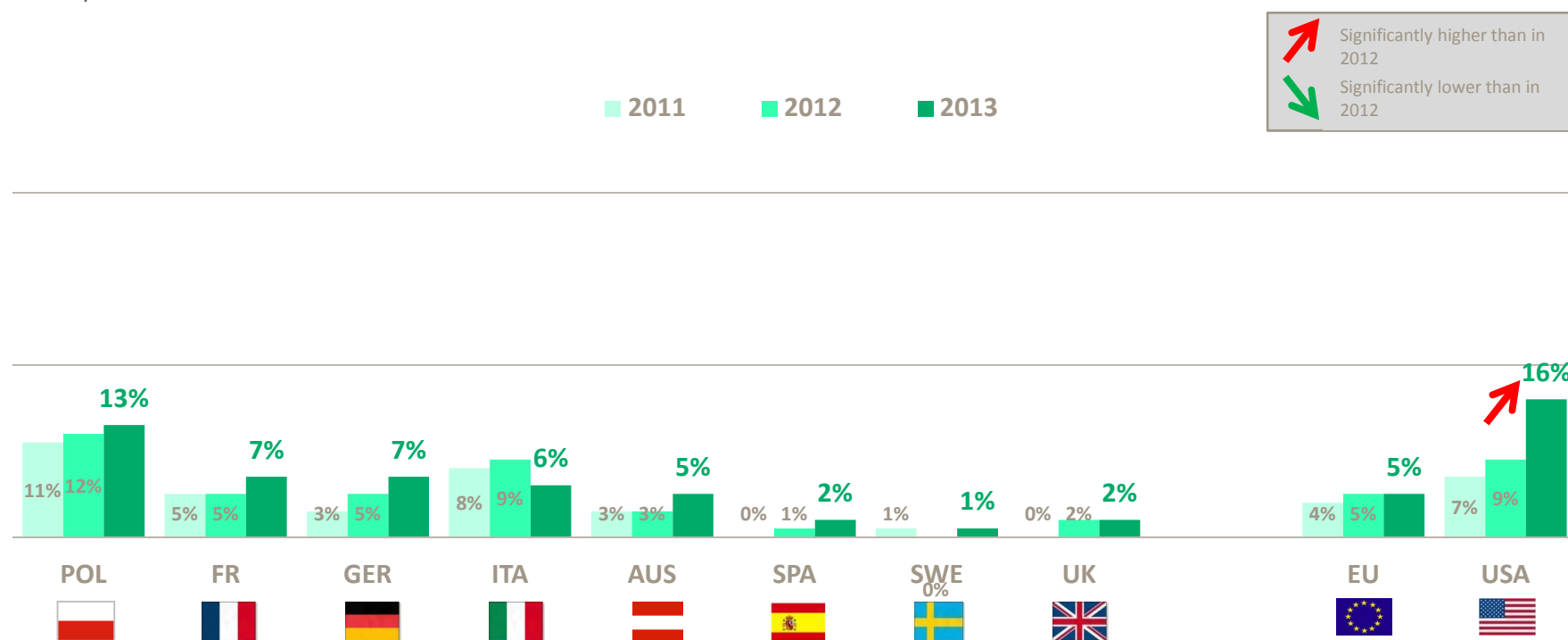
Development since 2011



Cancellations of intensive treatments - Developments

Have cancelled or postponed intensive medical treatments on account of financial difficulties

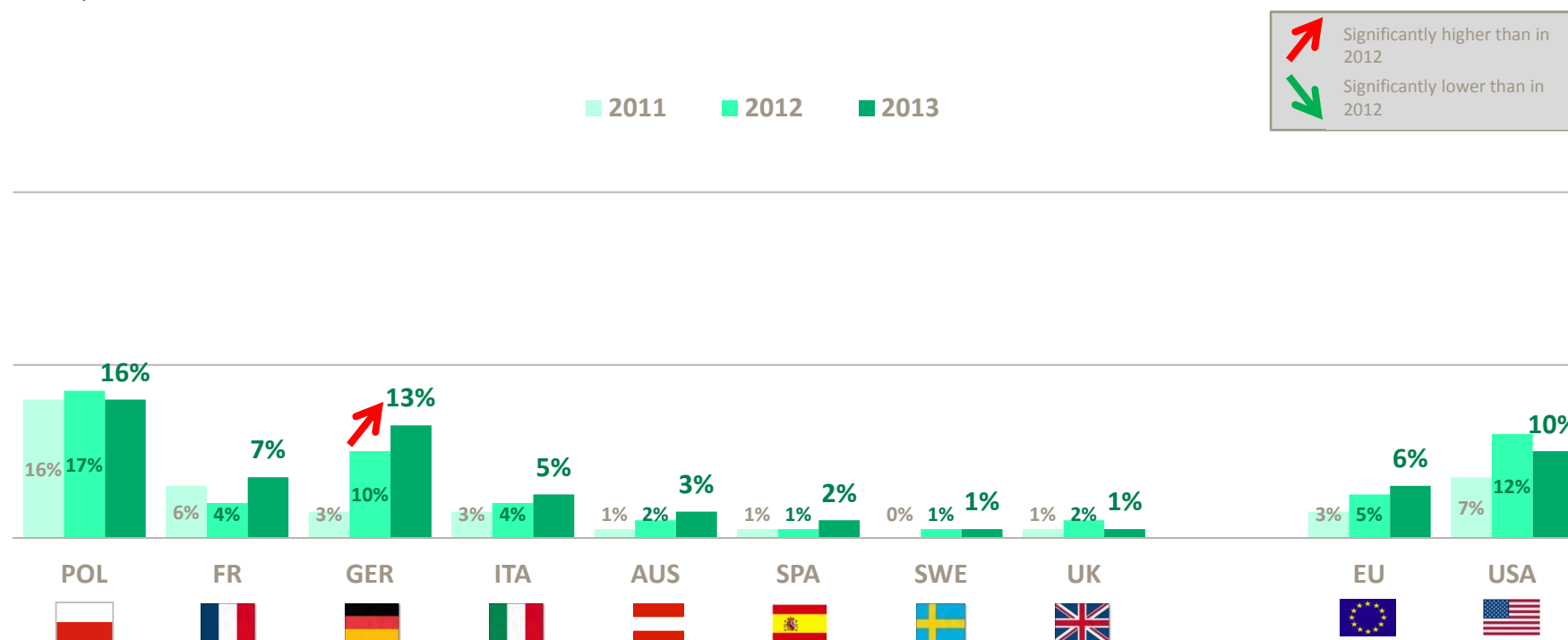
Development since 2011



Cancellations of medication - Developments

Have cancelled or postponed the purchase of medication on account of financial difficulties

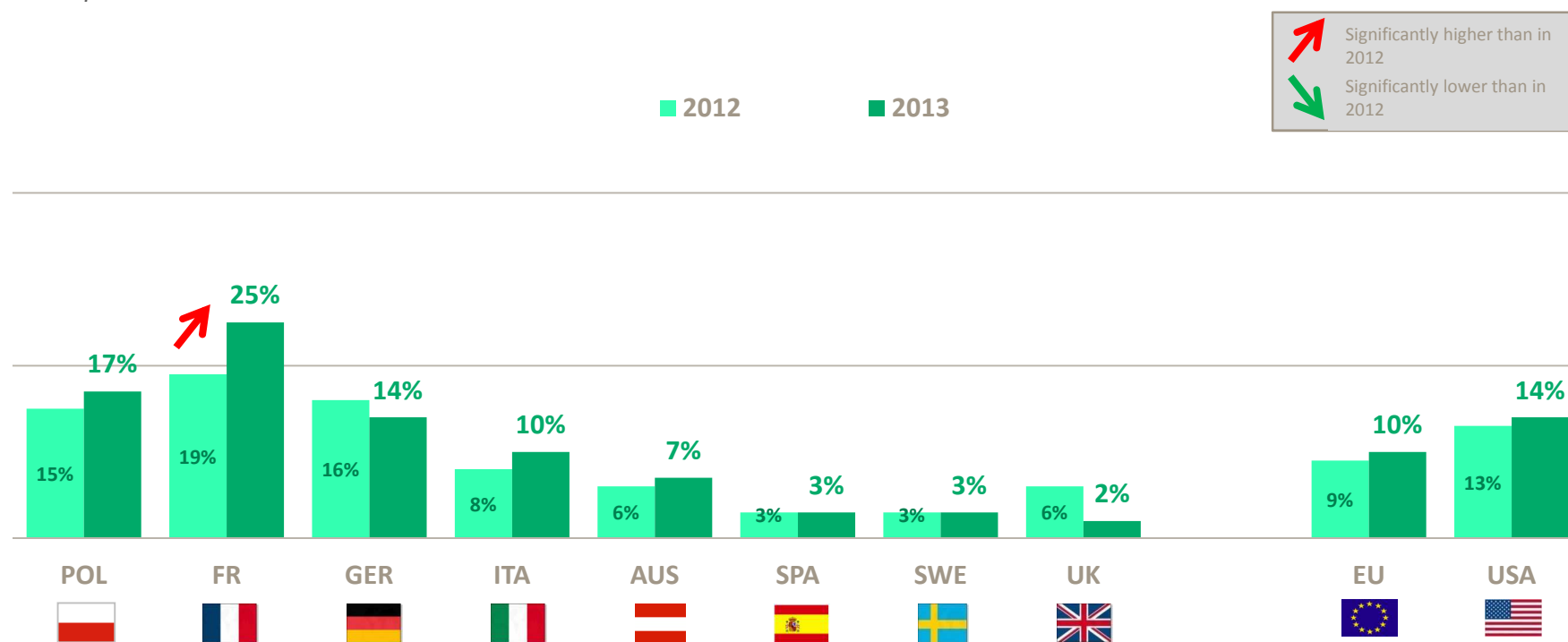
Development since 2012



Cancellations of dental treatments - Developments

Have cancelled or postponed dental treatments on account of financial difficulties

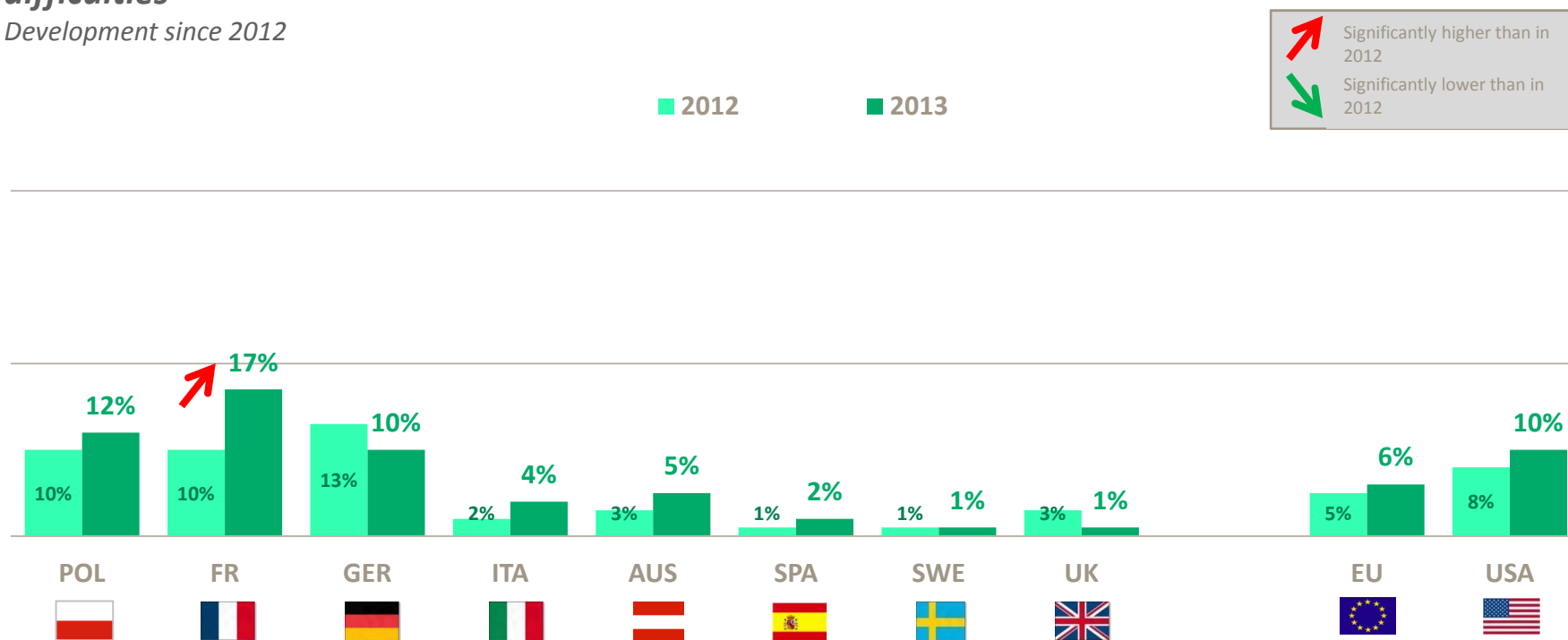
Development since 2012



Cancellation of the purchase of corrective glasses/lenses - Developments

Have cancelled or postponed the purchase of corrective glasses/lenses on account of financial difficulties

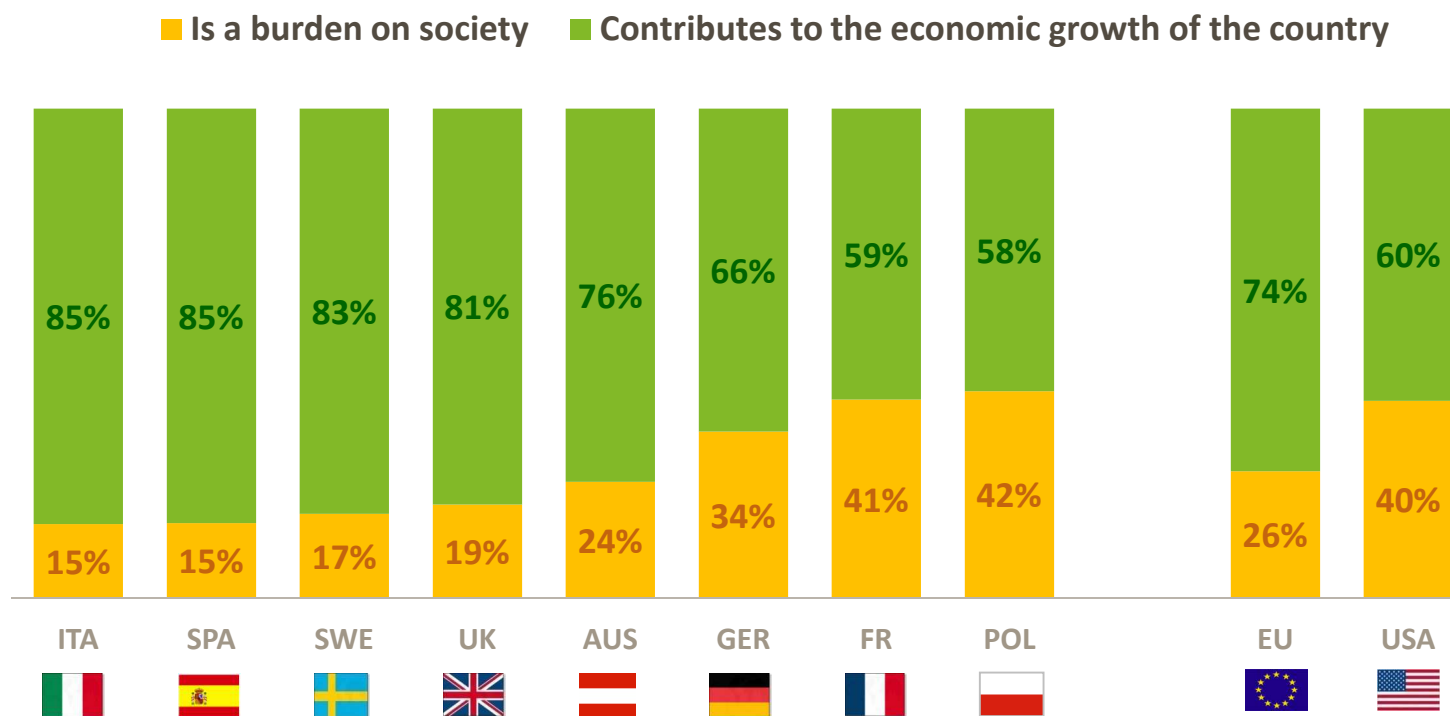
Development since 2012



Healthcare and economy

Contribution of the healthcare sector to the economy in 2013

Would you say that the healthcare sector, which includes all activities relating to medical equipment, treatments, consultations, medications and public and private healthcare institutions is a sector that, for you...

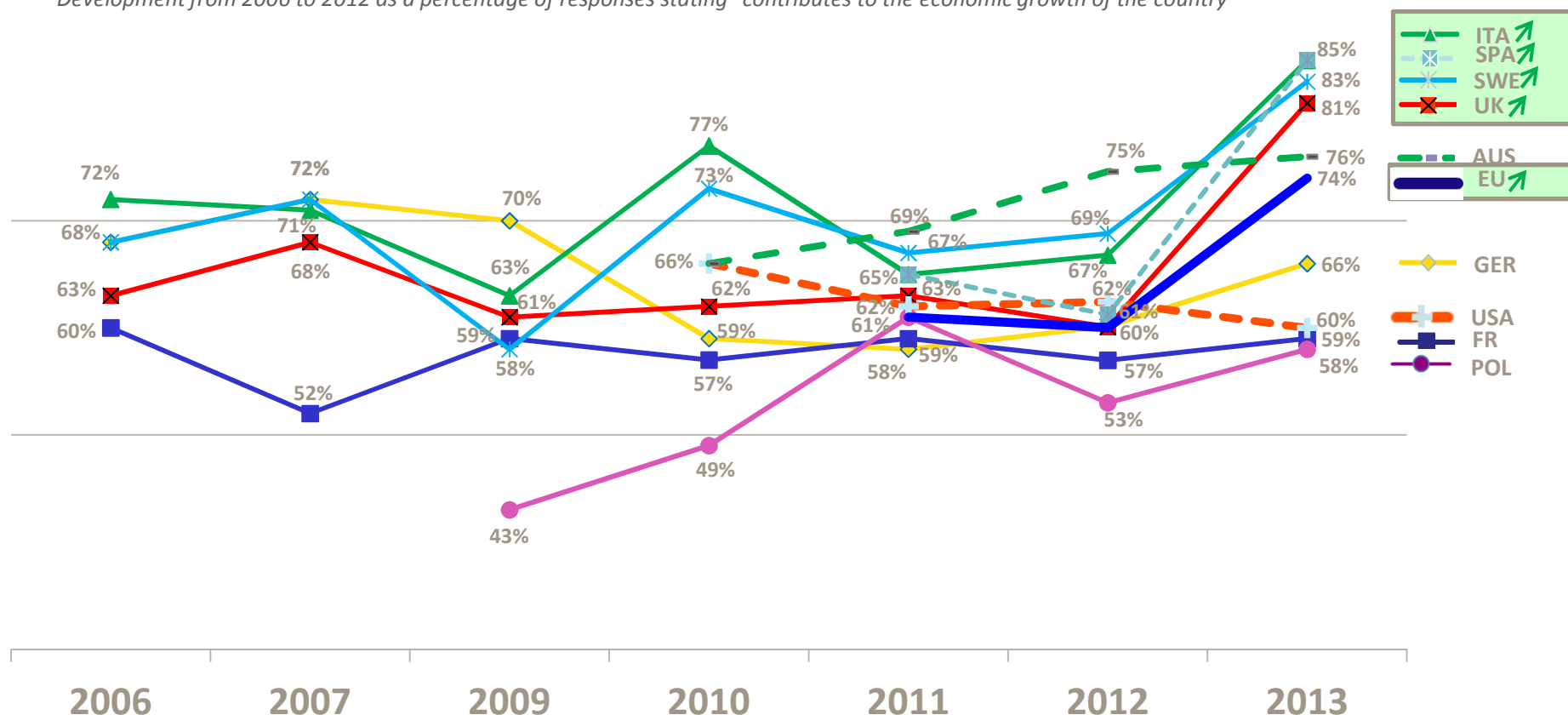


Contribution of the healthcare sector to the economy - Developments

Would you say that the healthcare sector, which includes all activities relating to medical equipment, treatments, consultations, medications and public and private healthcare institutions is a sector that, for you, contributes to the economic growth of the country or is a burden to the country: ...

Development from 2006 to 2012 as a percentage of responses stating "contributes to the economic growth of the country"

↗ Significantly higher than in 2012
↘ Significantly lower than in 2012

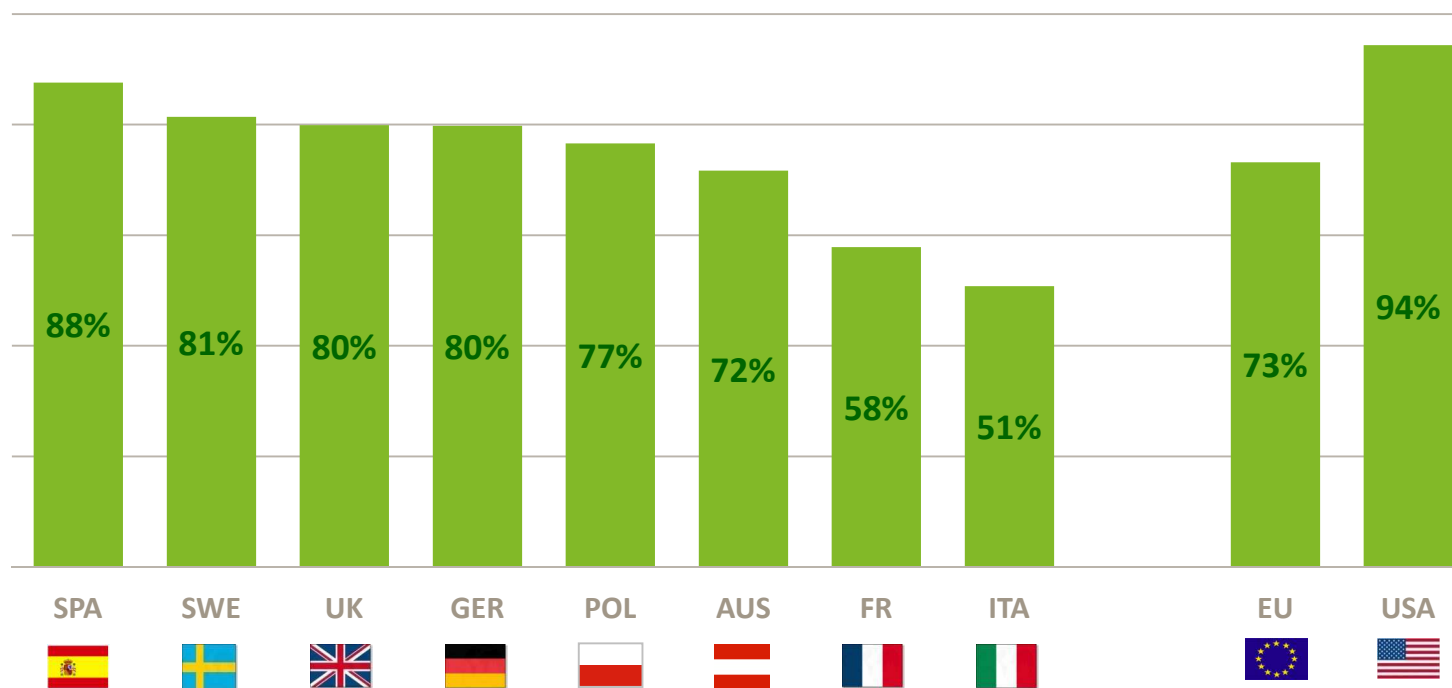


Prevention

Use of the health check in 2013

During the past 5 years, have you undergone a general health check?

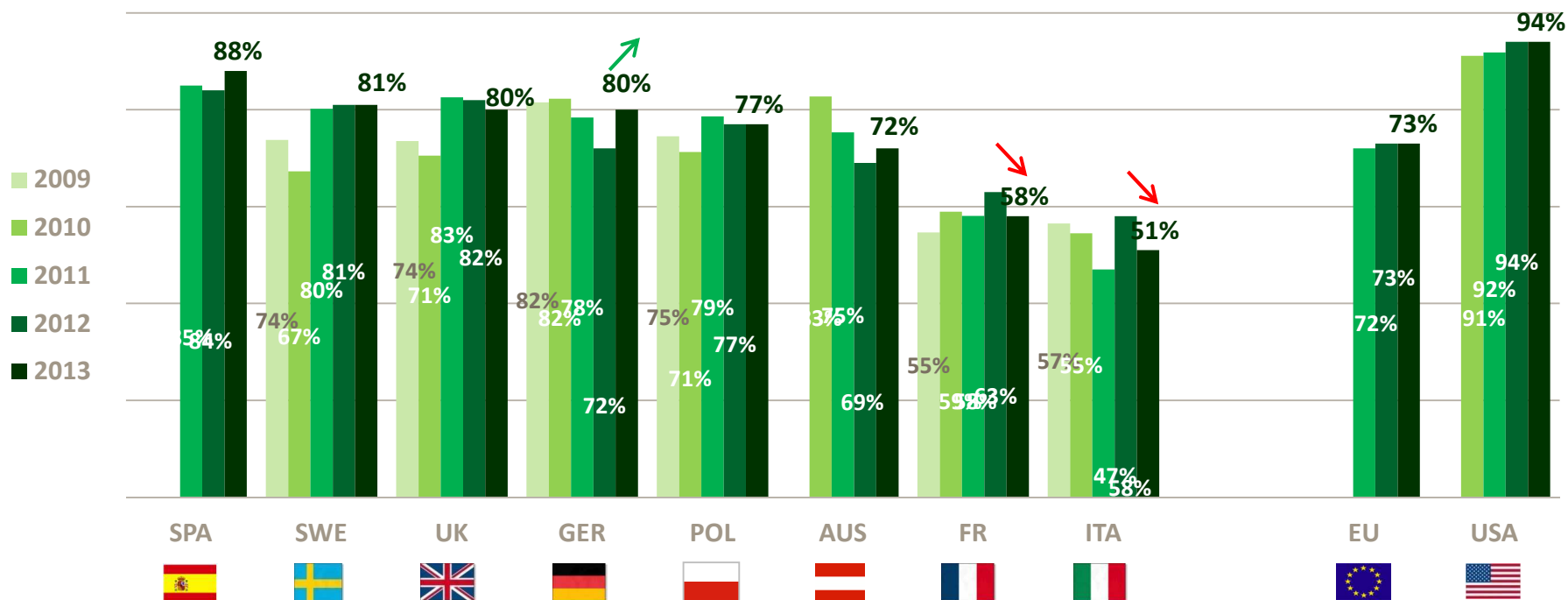
As a % of "have undergone a health check in the last 5 years" responses



Use of the health check - Developments

During the past 5 years, have you undergone a general health check?
development from 2009 to 2012 as a % of "have undergone a health check in the last 5 years" responses

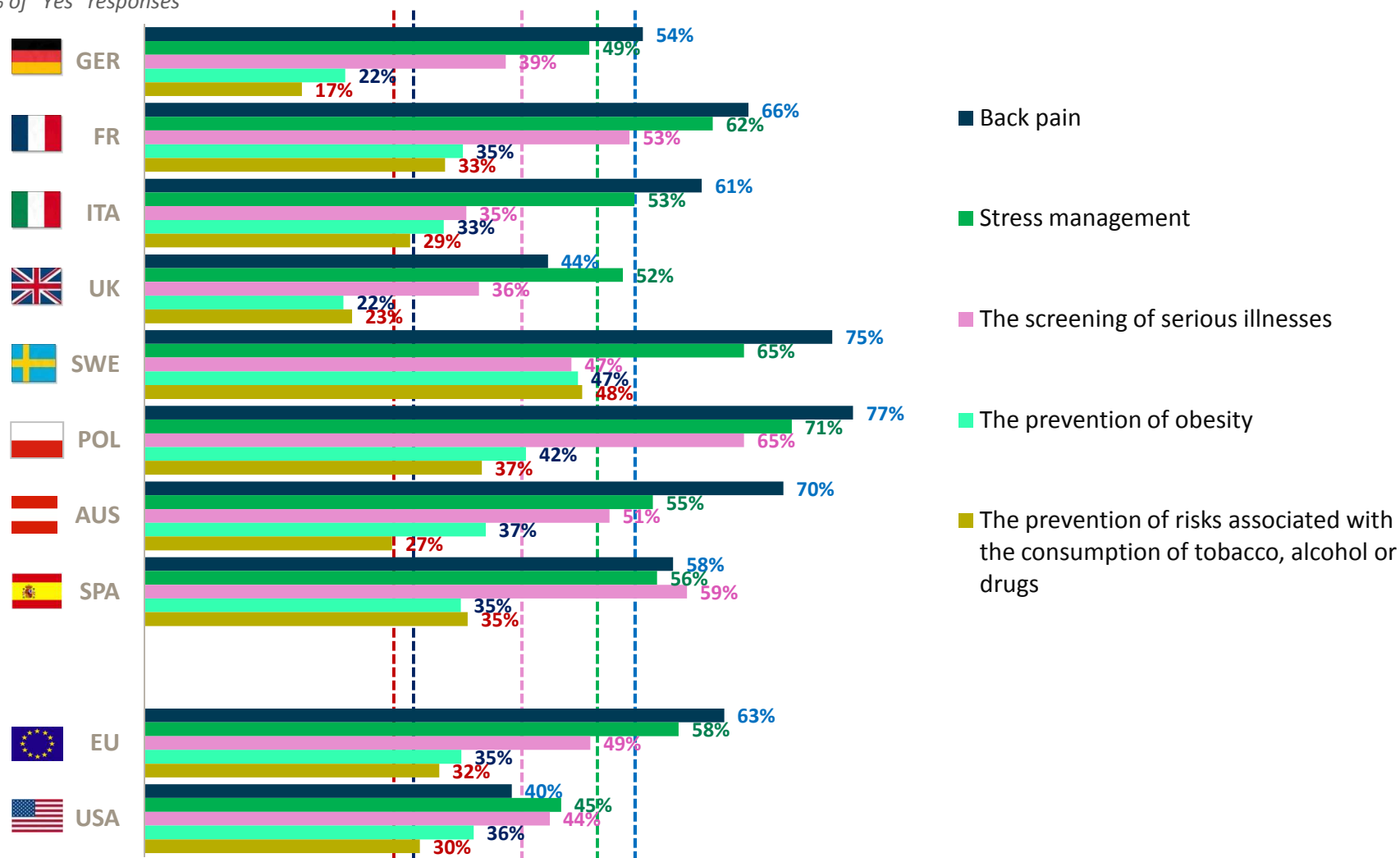
↗ Significantly higher than in 2011
↘ Significantly lower than in 2011



Healthcare programmes at work in 2013

Do you or do you not think that, within a work context, you require healthcare programmes for...

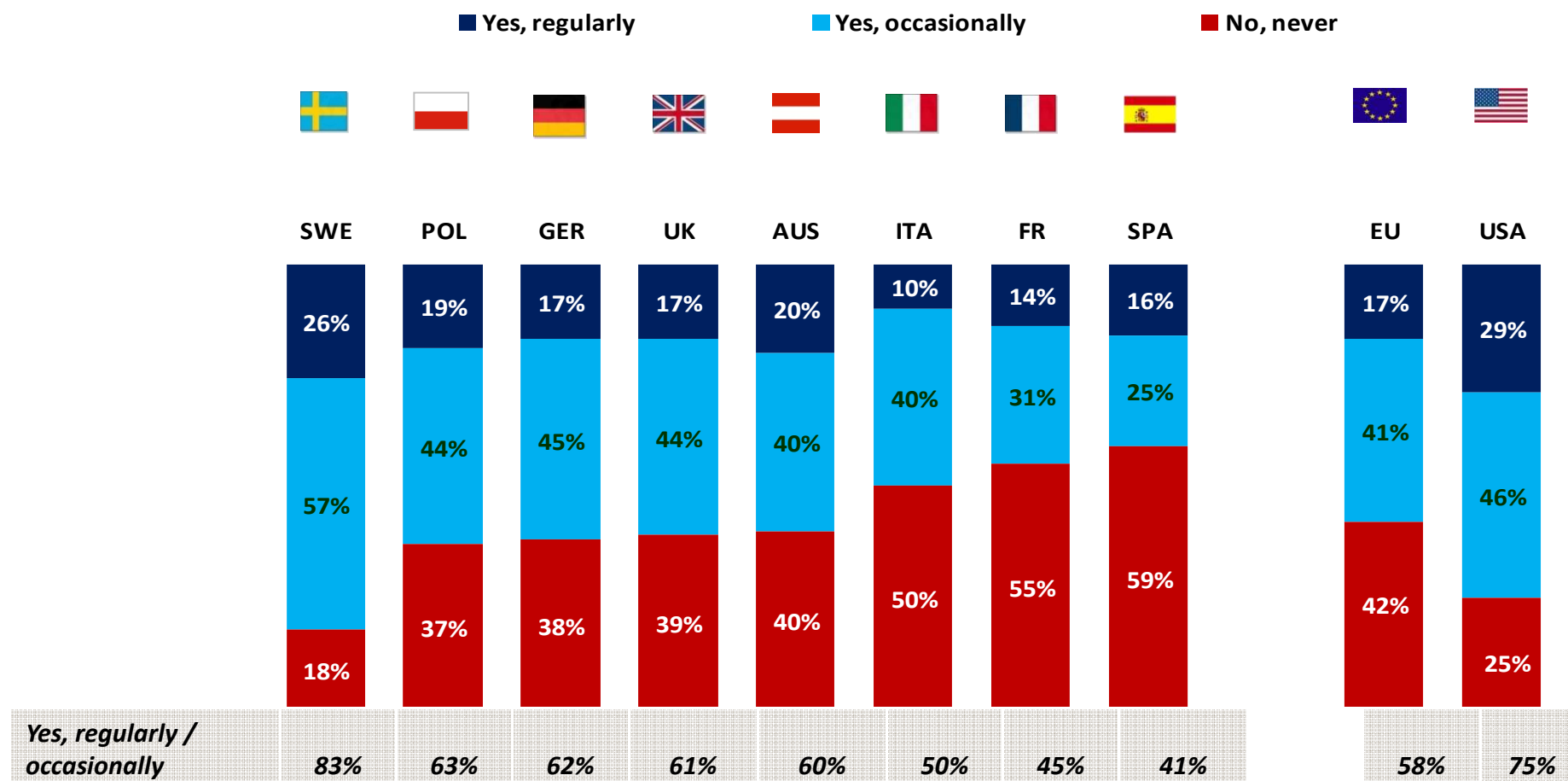
% of "Yes" responses



New technologies

Information via the Internet

Do you consult health-related information on the Internet: regularly, occasionally, rarely or never?

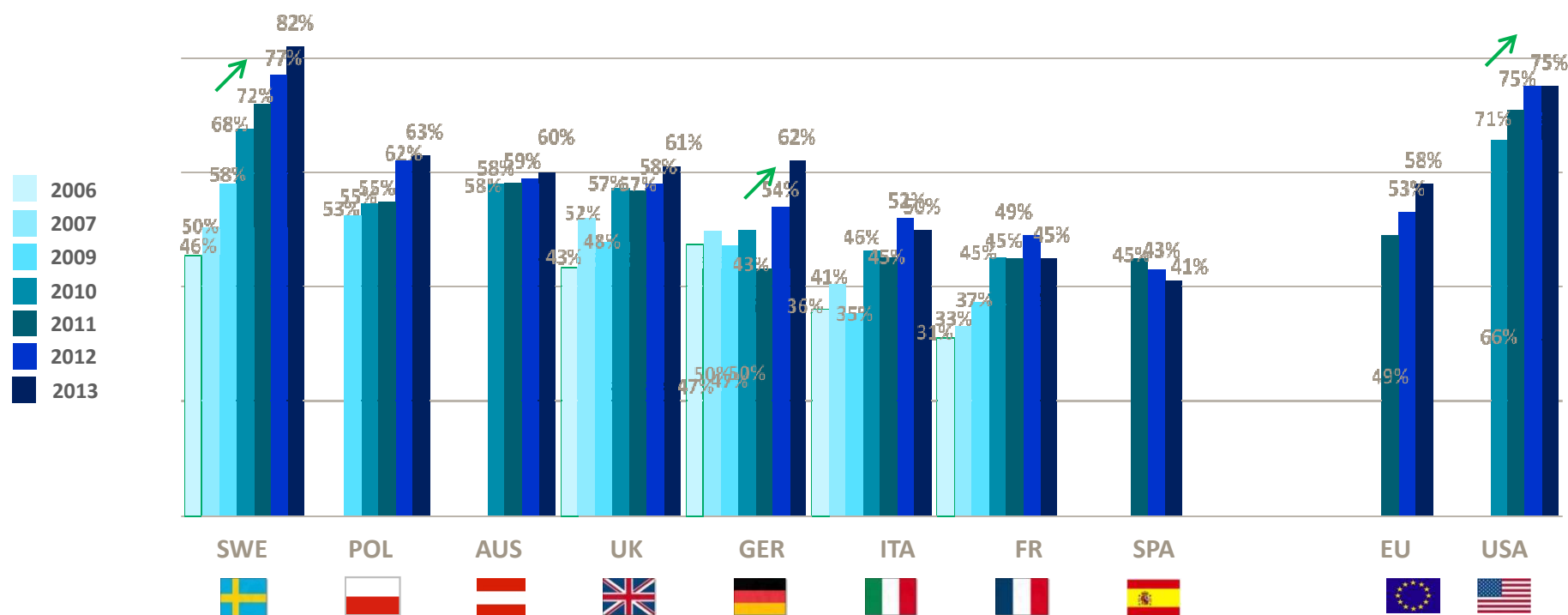


Information via the Internet - Development

Do you consult health-related information on the Internet: regularly, occasionally, rarely or never?

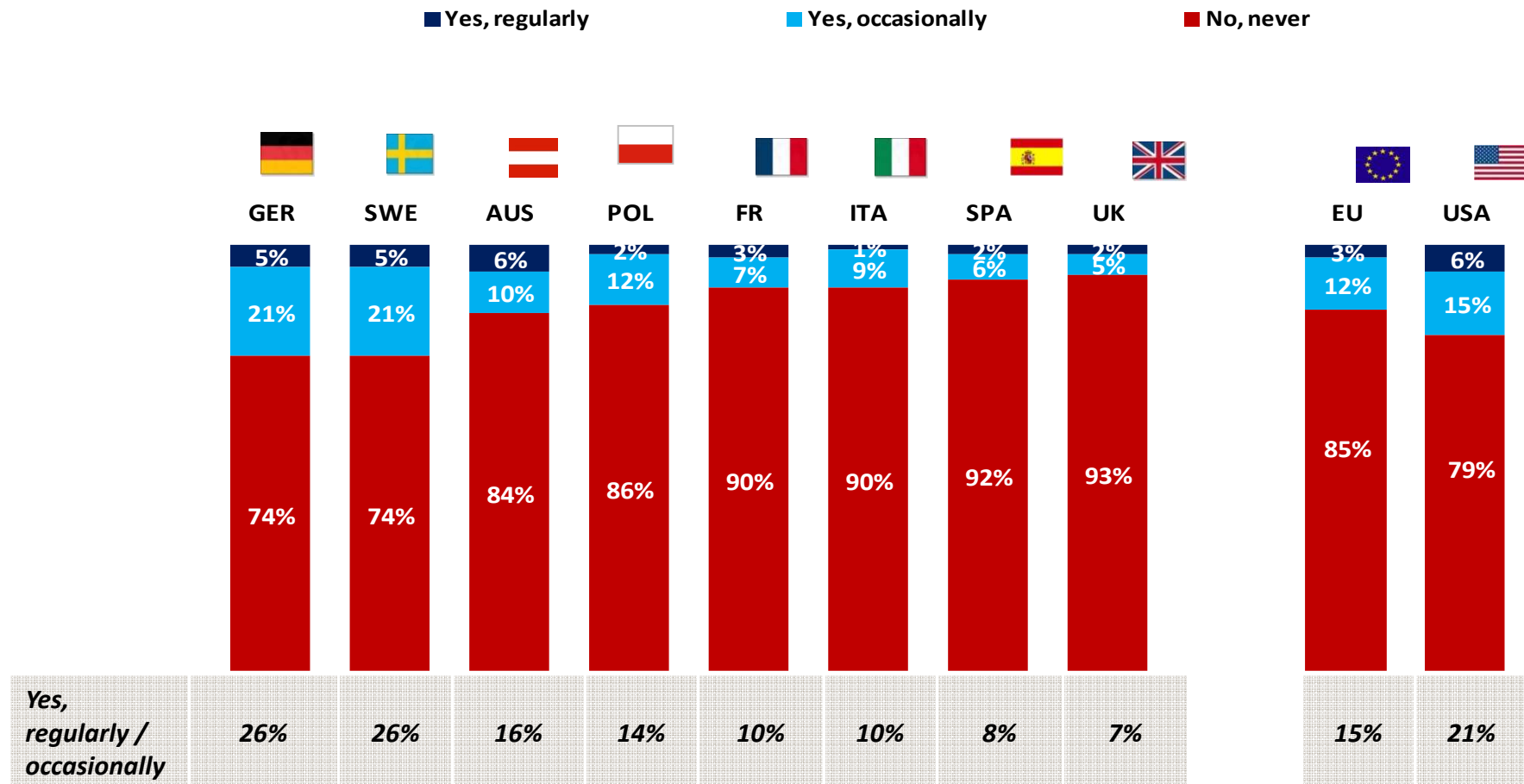
 Significantly higher than in 2012
 Significantly lower than in 2012

Development in the "Yes, regularly" and "Yes, occasionally" sub-total.



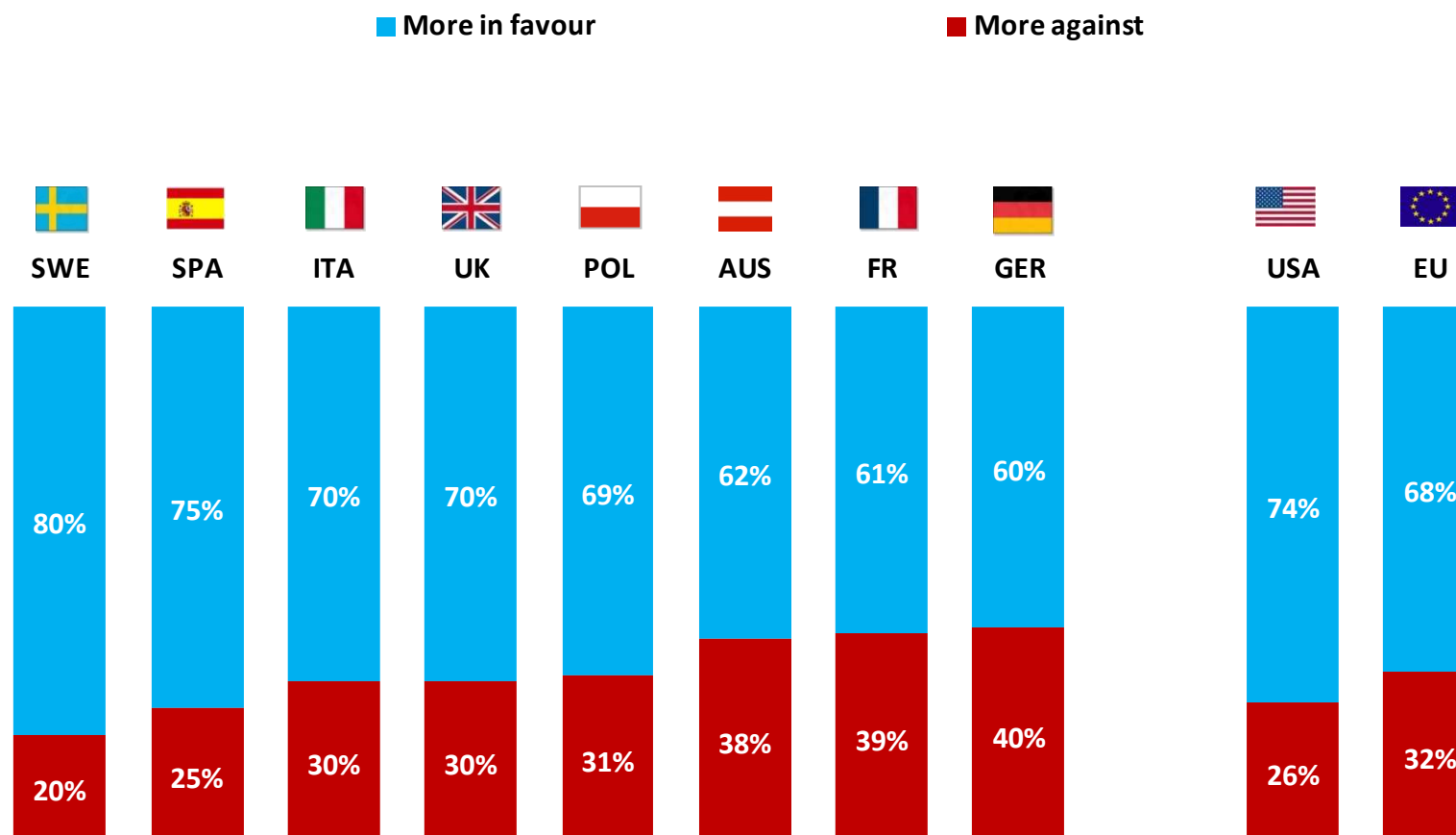
Healthcare and social networks

Do you share and exchange information, opinions or comments regarding your health with other people on social networks?



Continual home monitoring by mobile telephone

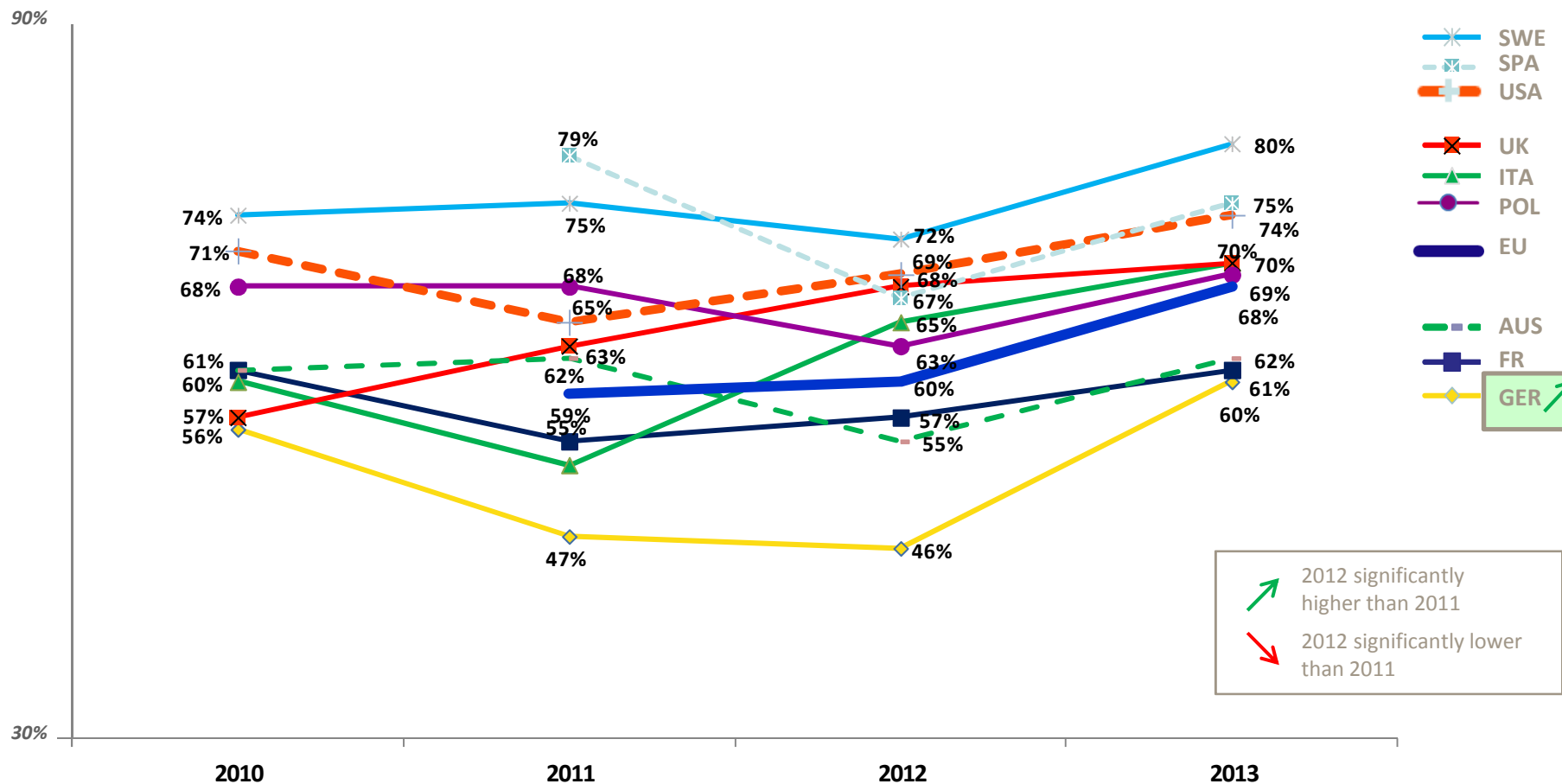
Are you more in favour of or against the development of means of continual medical monitoring by mobile telephone? (example: daily log of sugar levels, measurement of blood pressure and heart rhythm)?



Continual home monitoring by telephone - Development 2010-2013

Are you more in favour of or against the development of means of continual medical monitoring by mobile telephone? (example: daily log of sugar levels, measurement of blood pressure and heart rhythm)?

Development of opinions regarding continual home monitoring by telephone since 2010, as a % of responses more in favour



Medical consultation via the Internet

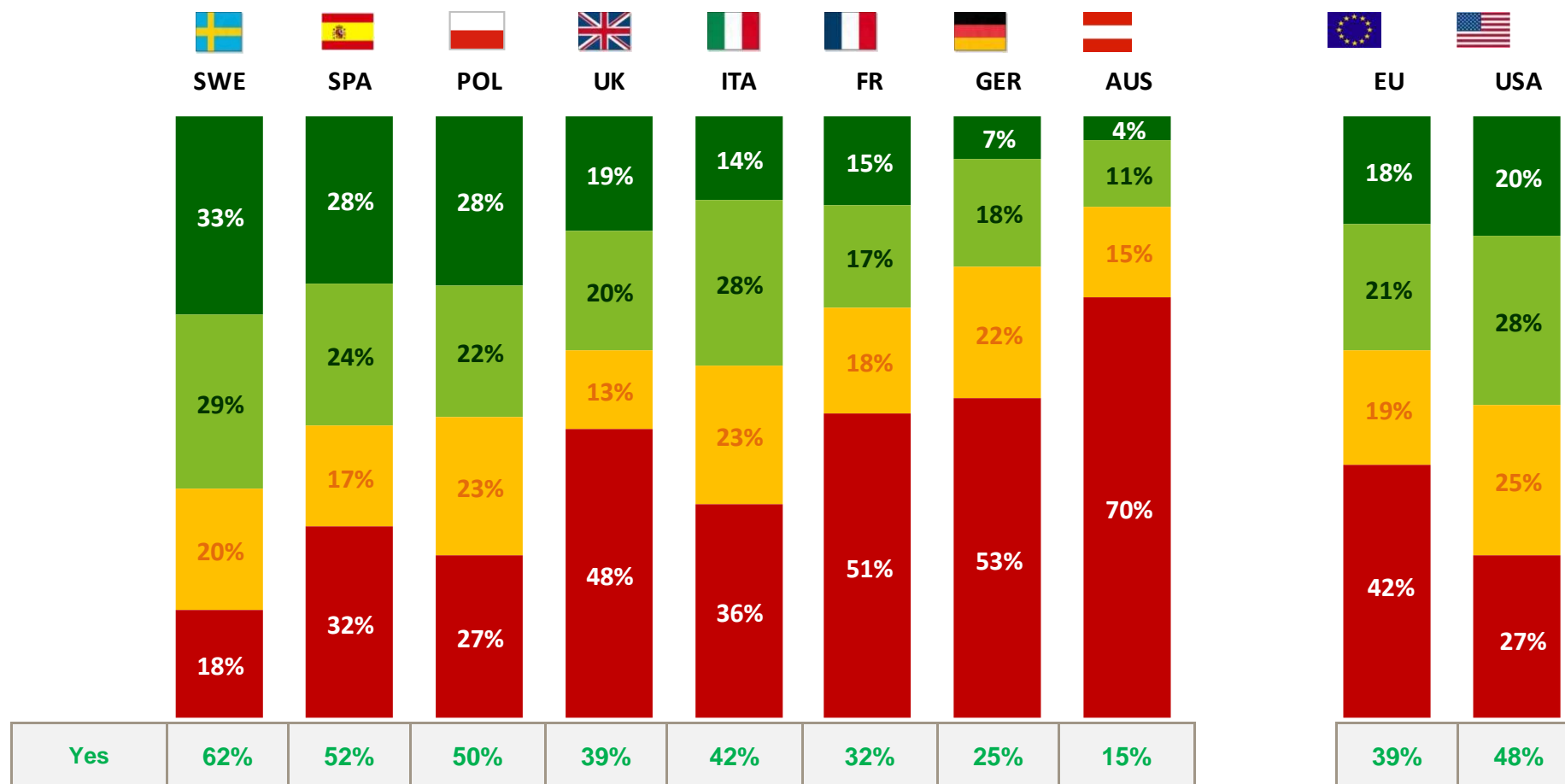
If it were offered to you, would you or would you not consult your GP remotely by means of a video camera link via the Internet (webcam)?

■ Yes, certainly

■ Yes, probably

■ No, probably not

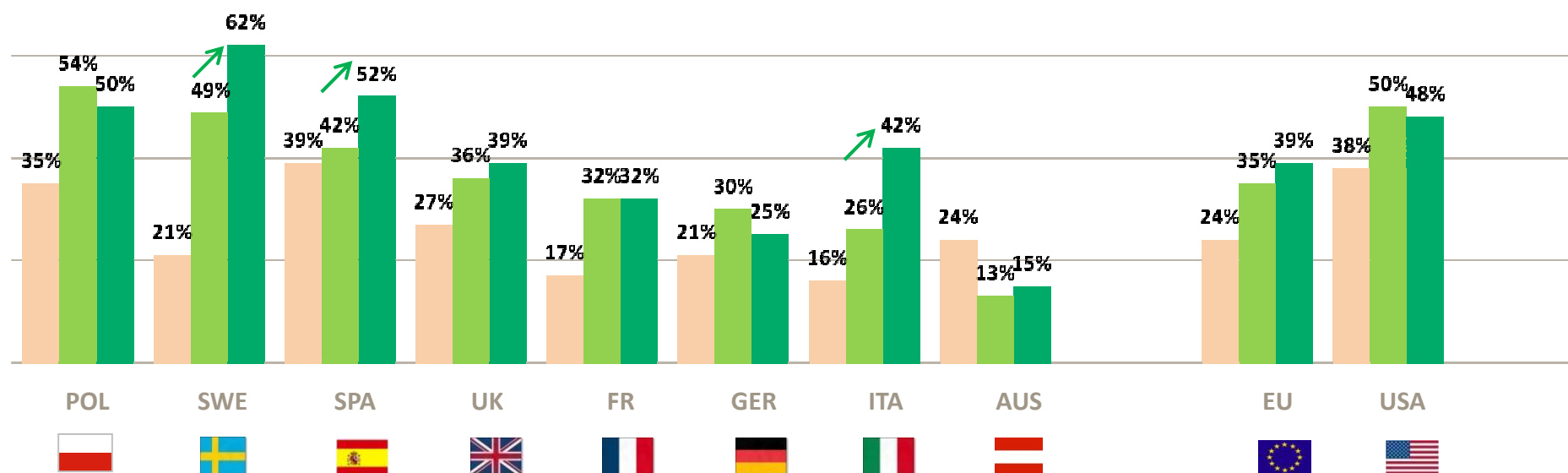
■ No, certainly not



Medical consultation via the Internet - Development

If it were offered to you, would you or would you not accept the offer to consult your GP remotely by means of a video camera link via the Internet (webcam)?

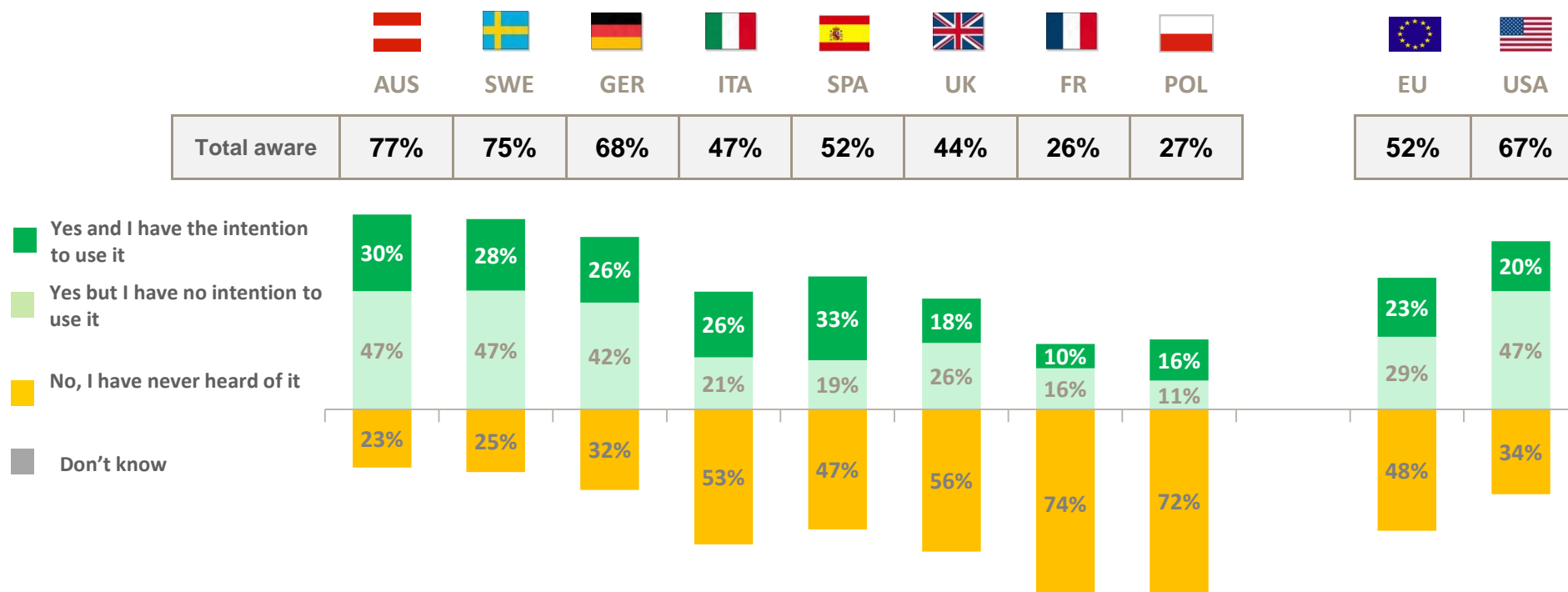
- 2012: Total of responses "Yes, certainly" + "Yes, probably"
- 2013: Total of responses "Yes, certainly" + "Yes, probably"



Genome mapping in 2013

Everyone will soon be able to access their genome map and this will enable them to predict the genetic risk of serious illnesses.

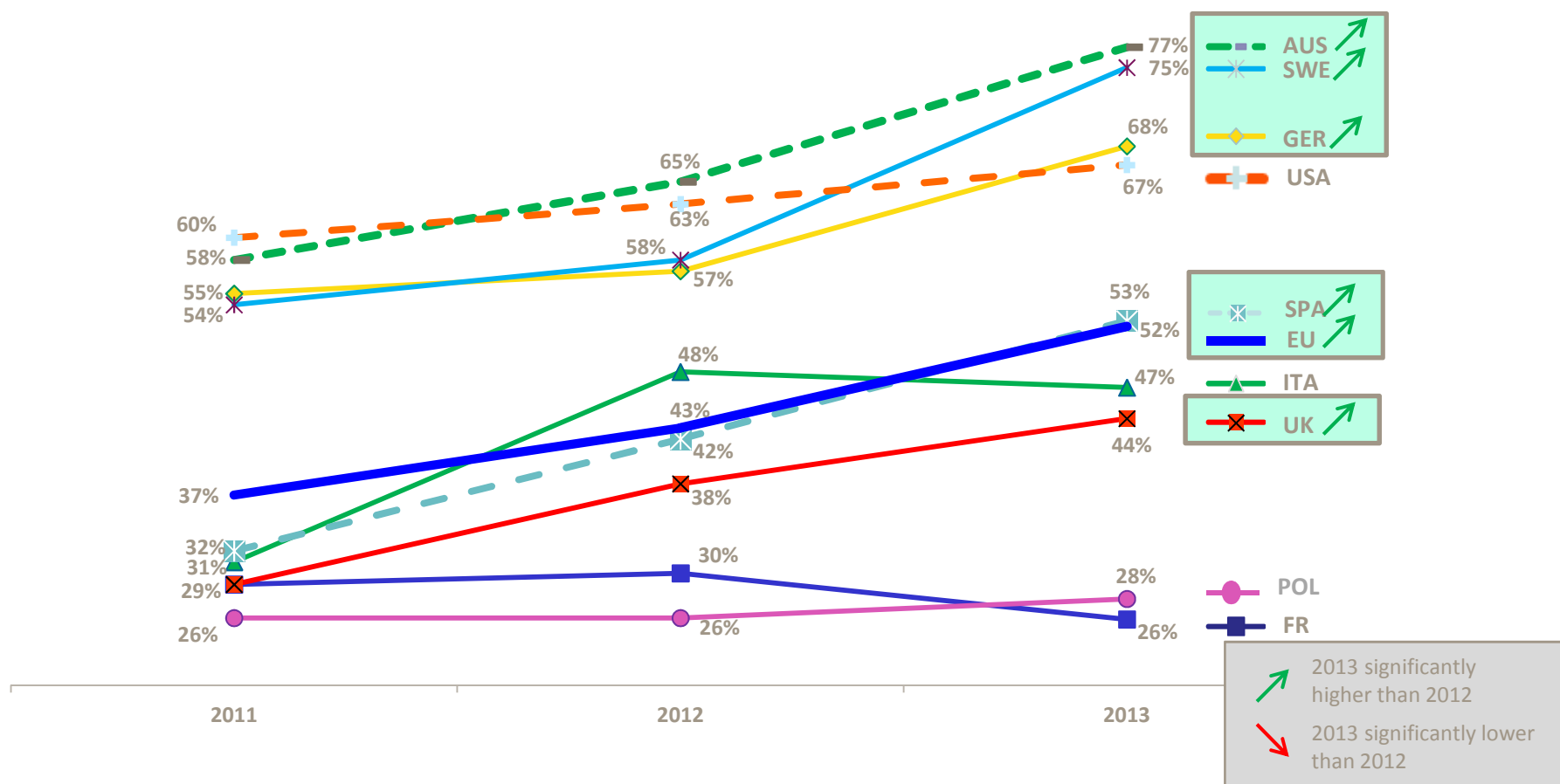
Have you already heard this being mentioned and do you have the intention to use it?



Genome mapping - Developments

Everyone will soon be able to access their genome map and this will enable them to predict the genetic risk of serious illnesses. Have you already heard this being mentioned and do you have the intention to use it?

Development of knowledge of the genome map since 2011 (% of those aware)

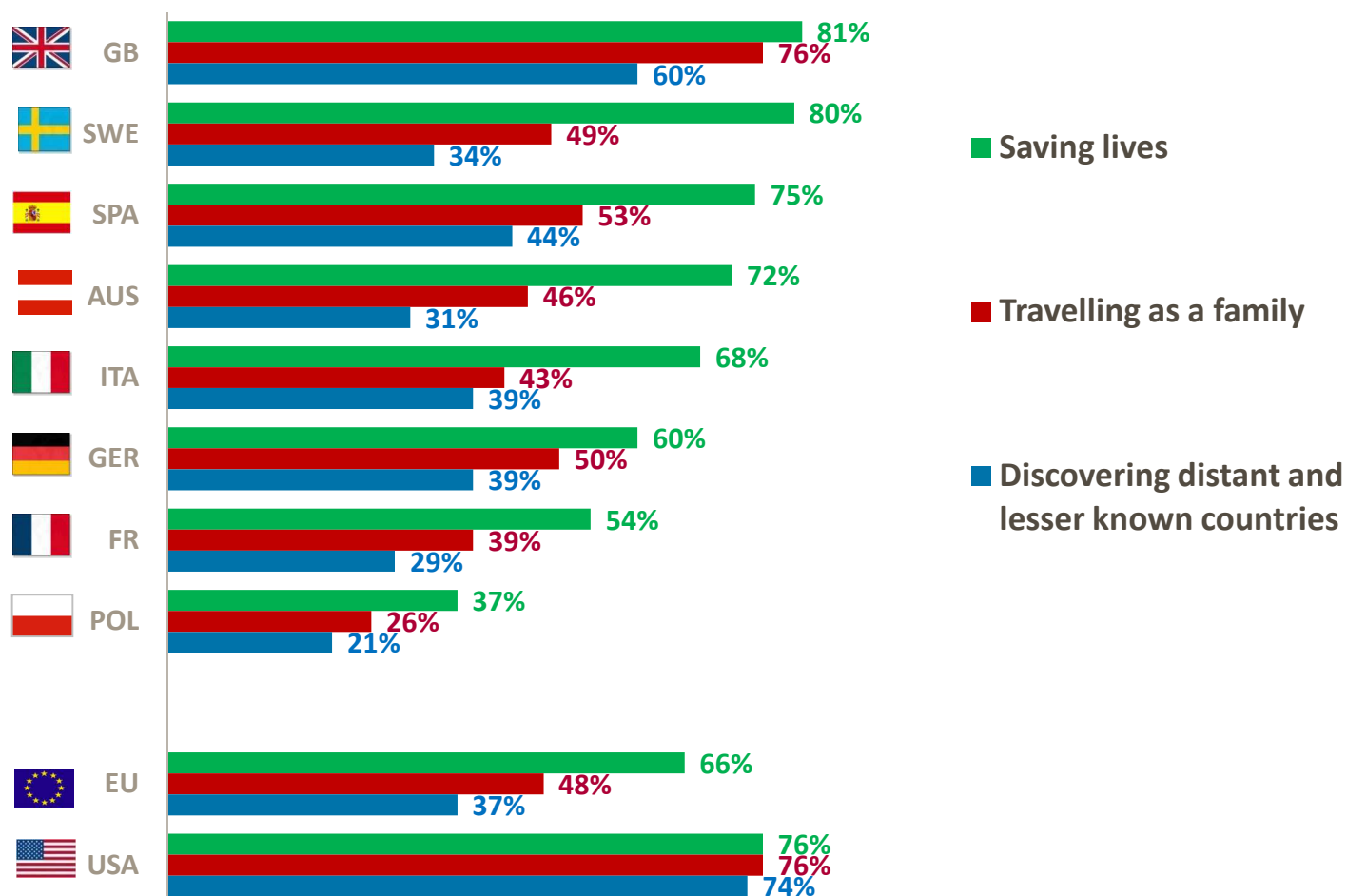


Healthcare and travel abroad

The benefits of repatriation for medical reasons

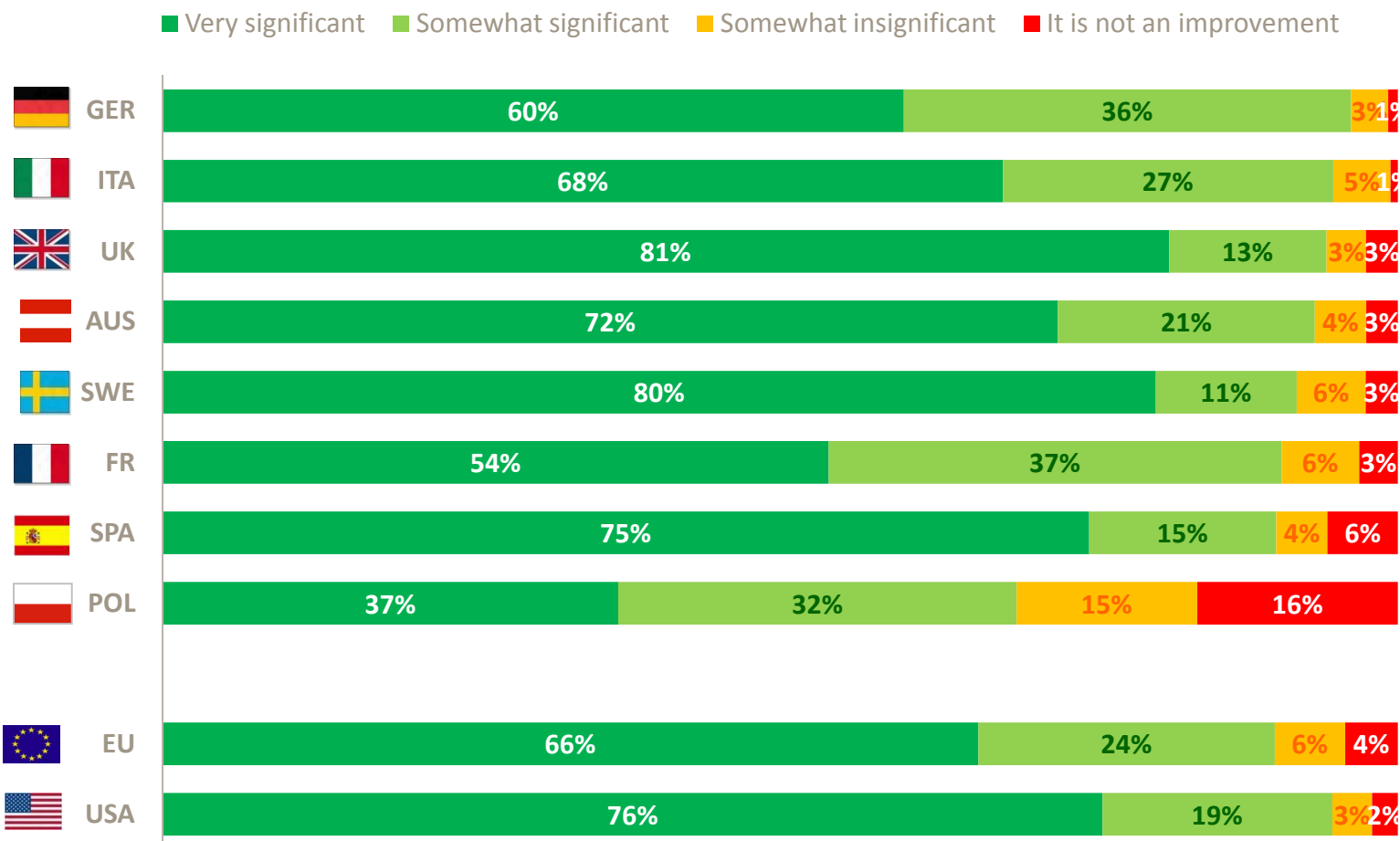
For each of the following trends concerning healthcare and travel, would you say that for yourself or people like you, repatriation for medical reasons in the event of accidents or serious illnesses suffered while travelling abroad, has represented an improvement or not?

Number of assessments as "very important" as a %



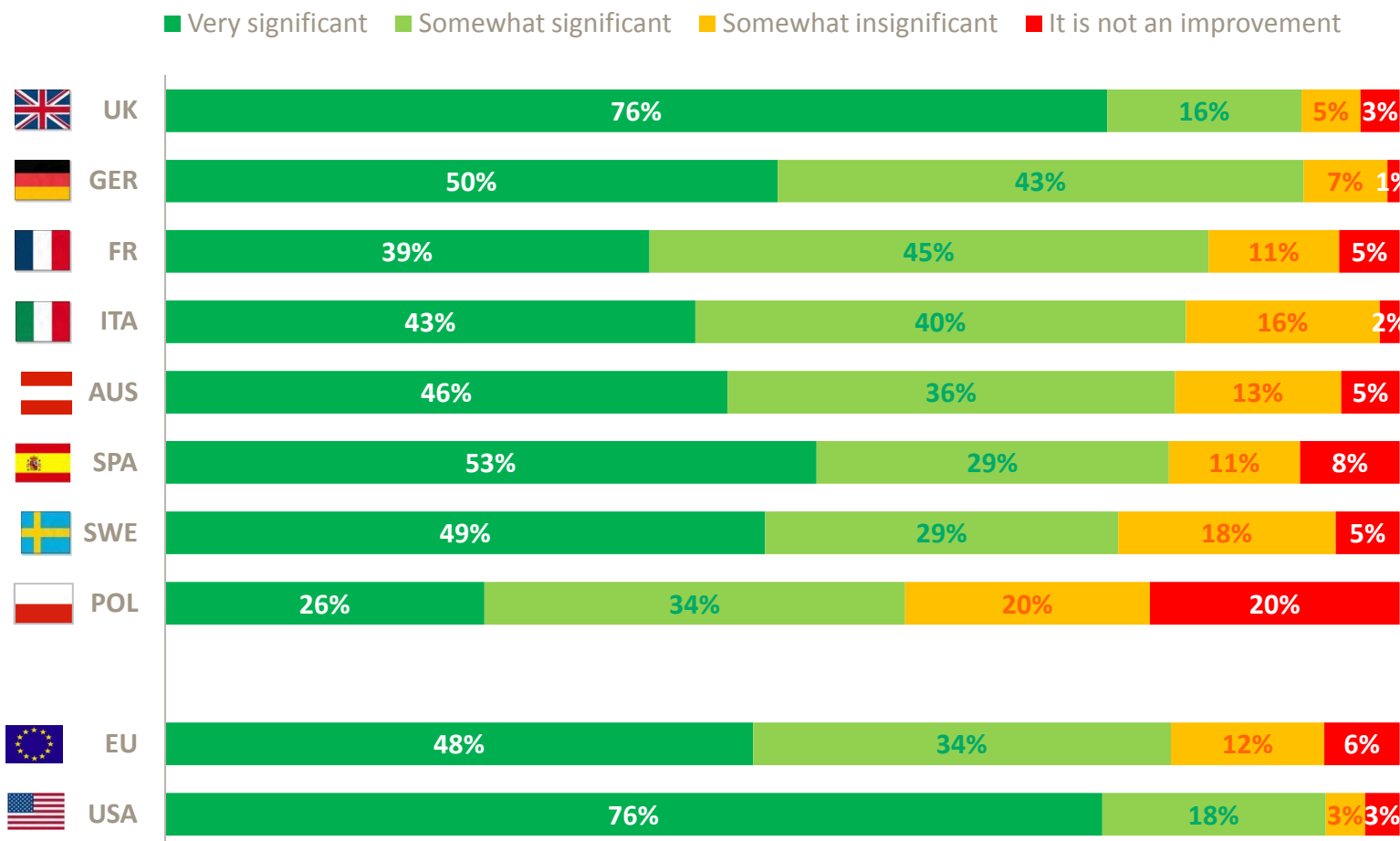
The benefits of repatriation to save lives

For each of the following trends concerning healthcare and travel, would you say that for yourself or people like you, repatriation for medical reasons in the event of accidents or serious illnesses suffered while travelling abroad, has represented an improvement or not?



The benefits of repatriation to travel as a family

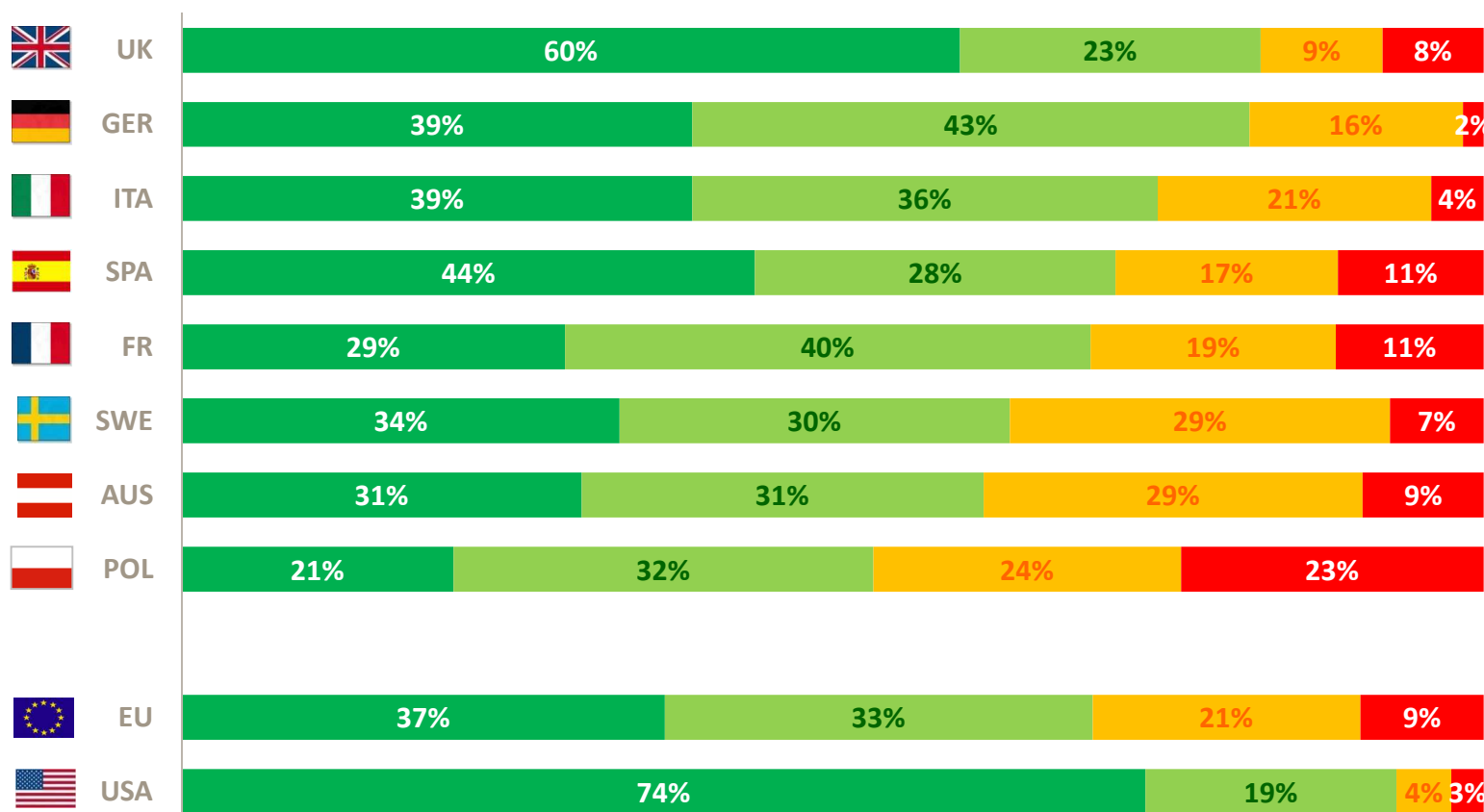
For each of the following trends concerning healthcare and travel, would you say that for yourself or people like you, repatriation for medical reasons in the event of accidents or serious illnesses suffered while travelling abroad, has represented an improvement or not?



The benefits of repatriation to discover distant and lesser known countries

For each of the following trends concerning healthcare and travel, would you say that for yourself or people like you, repatriation for medical reasons in the event of accidents or serious illnesses suffered while travelling abroad, has represented an improvement or not?

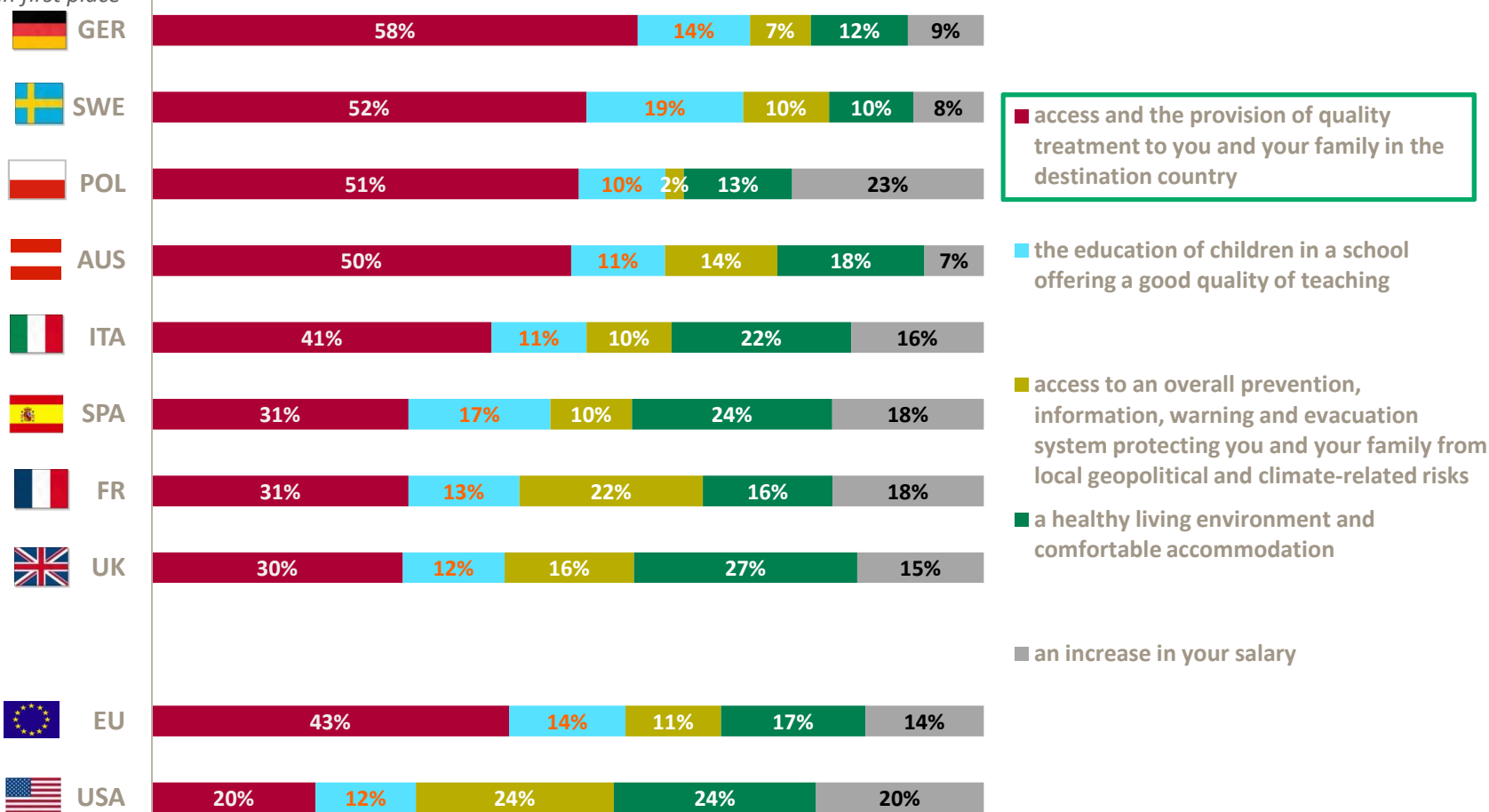
■ Very significant ■ Somewhat significant ■ Somewhat insignificant ■ It is not an improvement



The most important thing when it comes to work-related expatriation

If your employer were lead to offer you a position in a foreign country as an expatriate, of this list of suggestions, which would in your opinion be the most important criteria to be taken into consideration in order to accept this offer?

Factor listed in first place

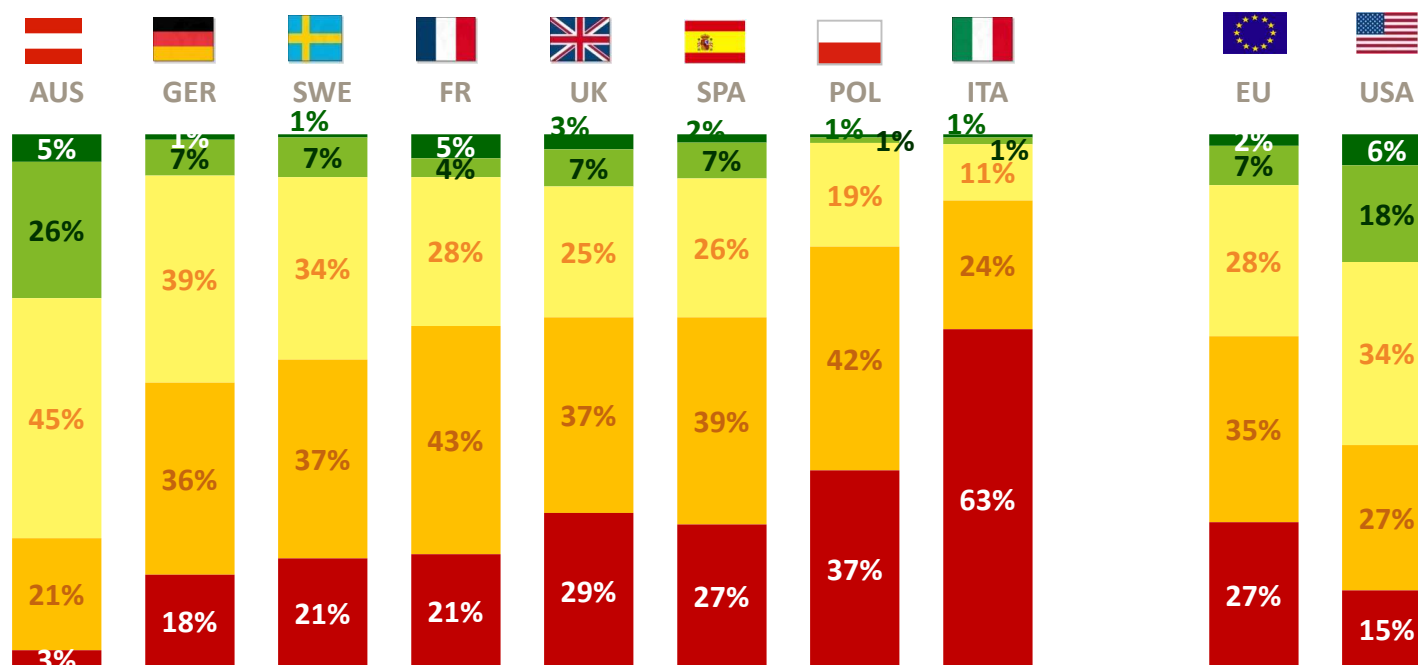


Provision of care for dependent elderly people

Evaluation of provision of care for the elderly in 2013

In your opinion, is the organisation and provision of care to elderly and dependent people:

■ Excellent ■ Very good ■ Good ■ Average ■ Poor



Excellent + Very good	31%	8%	8%	9%	10%	9%	2%	2%
Average score	5.7	4.1	3.9	3.9	3.6	3.6	2.9	2.2

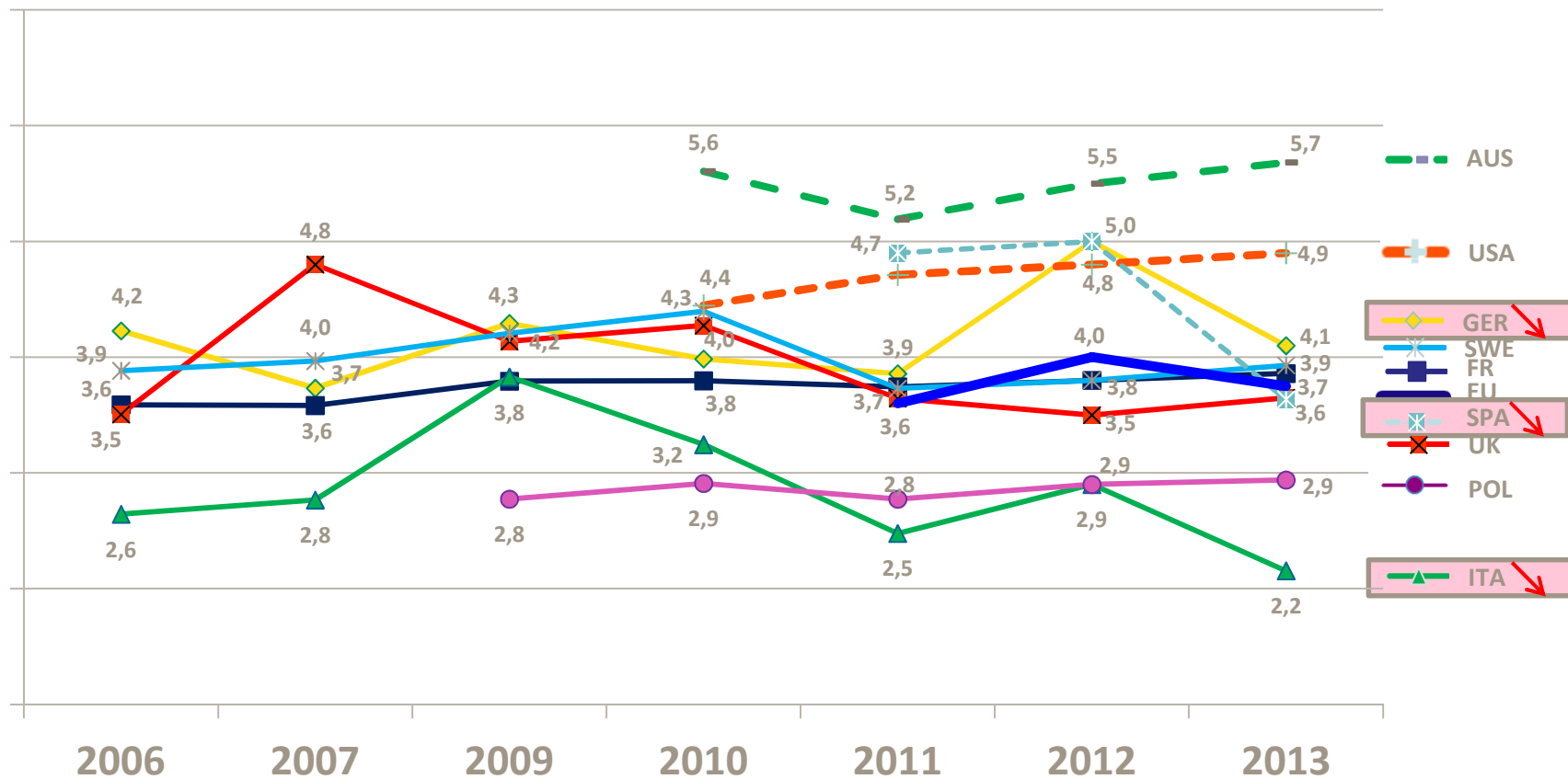
9%	24%
3.7	4.9

Evaluation of the provision of care for the elderly - Developments

In your opinion, is the organisation and provision of care to elderly and dependent people:

Calculated by assigning a value to the responses: poor = 1, average = 3.25, good = 5.5, very good = 7.75, excellent = 10
Development since 2006

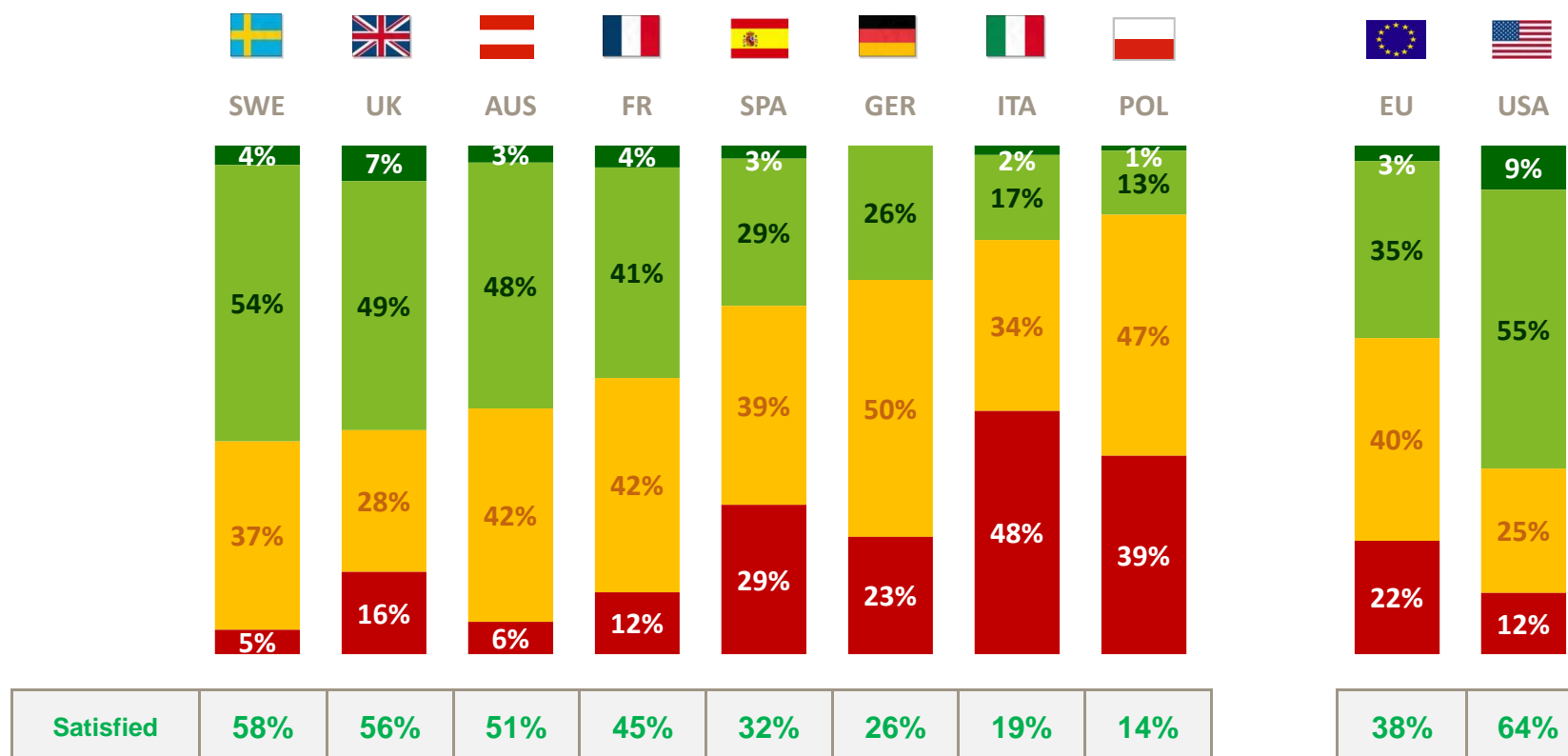
↗ 2013 significantly higher than 2012
↘ 2013 significantly lower than 2012



Evaluation of the financing of dependence by public aid in 2013

Is public financial aid for home care for elderly or dependent people...

■ Completely satisfactory ■ Somewhat satisfactory ■ Somewhat unsatisfactory ■ Completely unsatisfactory



Evaluation of the financing of dependence by public aid - Developments

Is public financial aid for home care for elderly or dependent people sufficient?

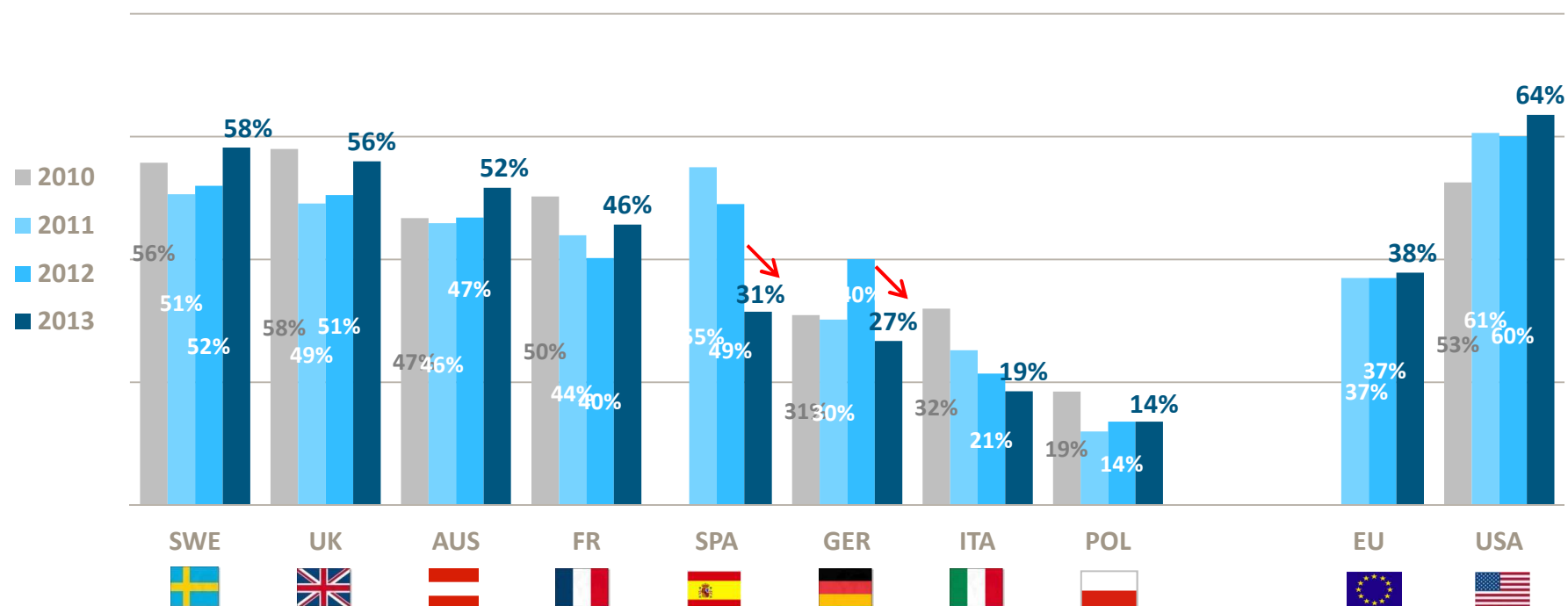
Development between 2010 and 2013 in the % of "public aid is satisfactory" responses



2013 significantly higher than 2012

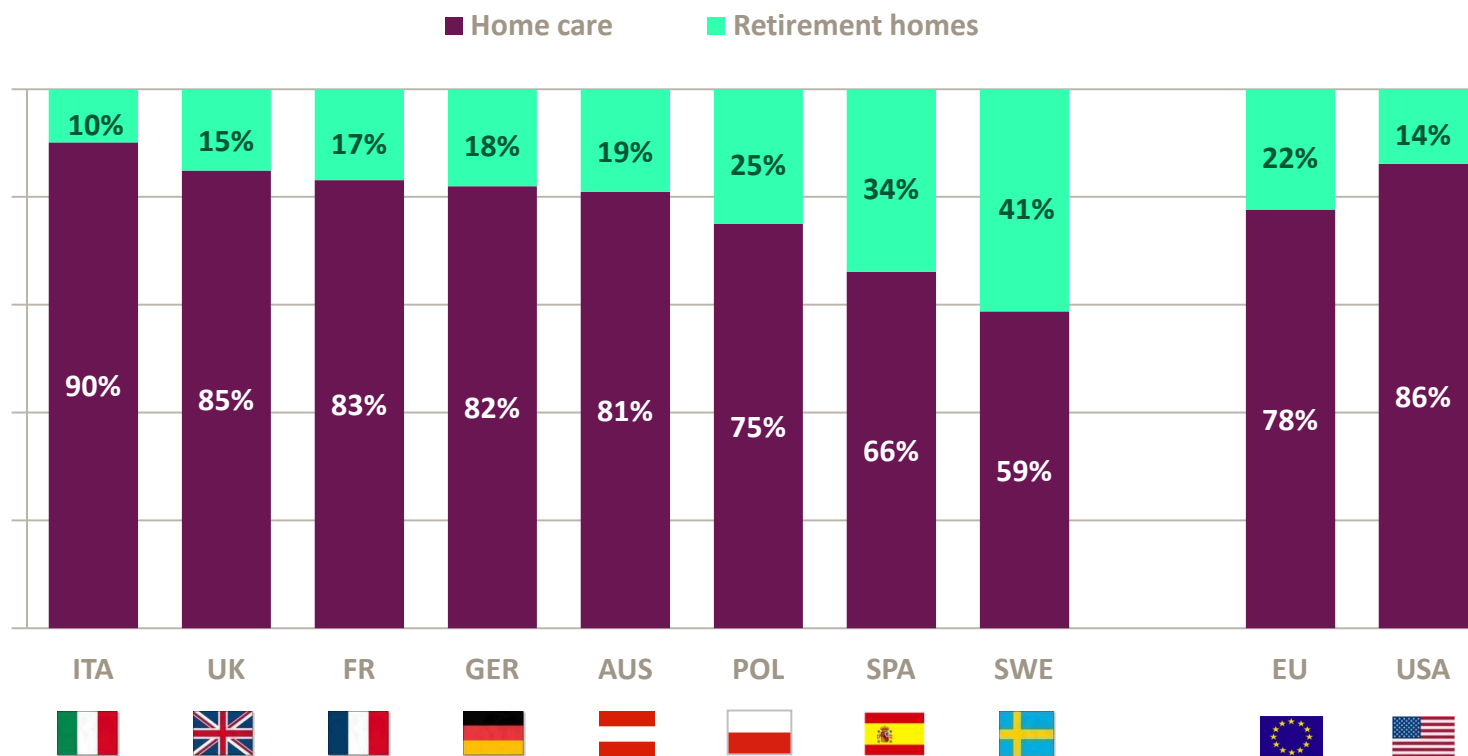


2013 significantly lower than 2012





Measures to be prioritised regarding the provision of care to elderly and dependent people in 2013

In view of the problems posed by prolonging life expectancy and the increase in the number of elderly and dependent people, what measures should be undertaken today as a matter of priority?

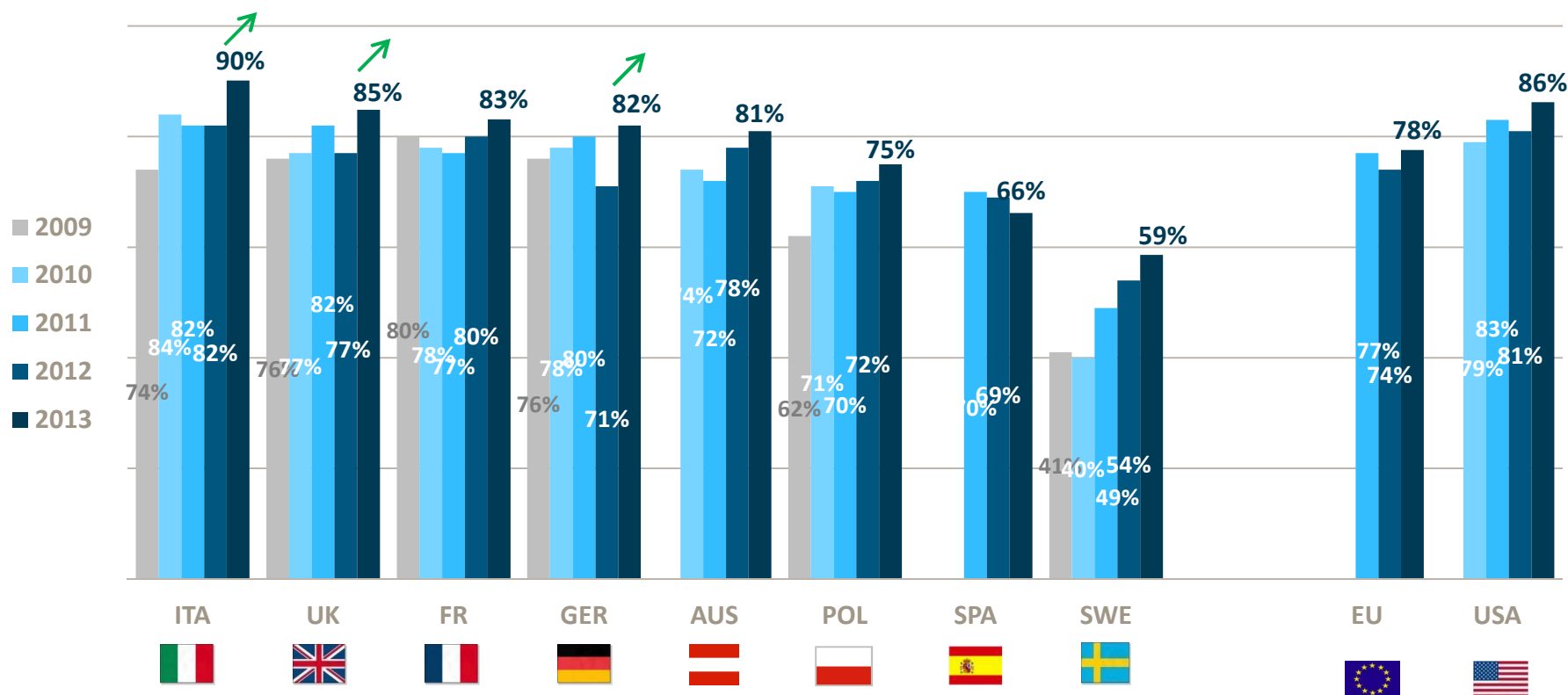


Priority given to home care in the provision of care to elderly and dependent people - Developments

 2013 significantly higher than 2012
 2013 significantly lower than 2012

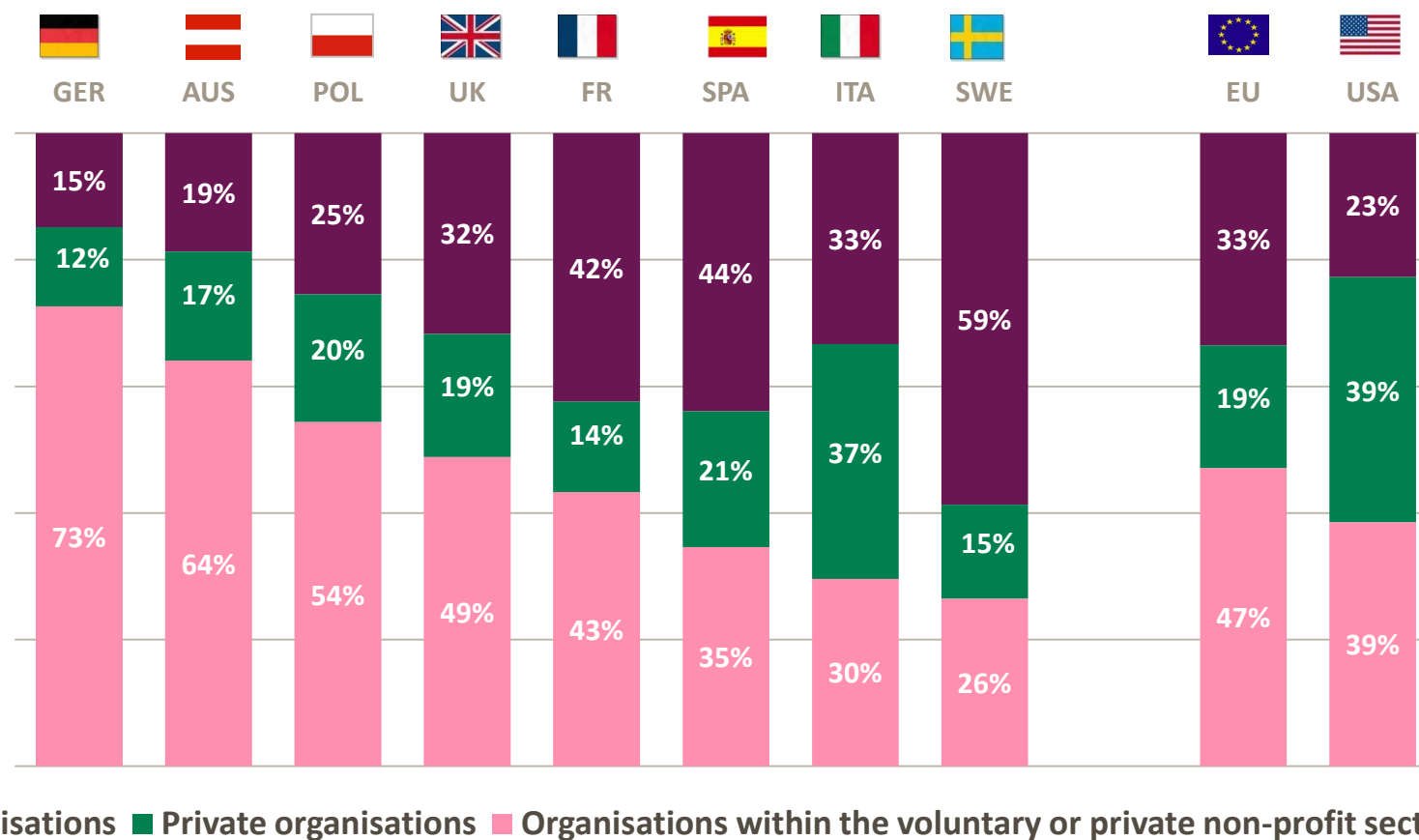
In view of the problems posed by prolonging life expectancy and the increase in the number of elderly and dependent people, what measures should be undertaken today as a matter of priority?

Development between 2009 and 2013 in the % of "give priority to home care for elderly and dependent people" in relation to the suggestion of retirement homes



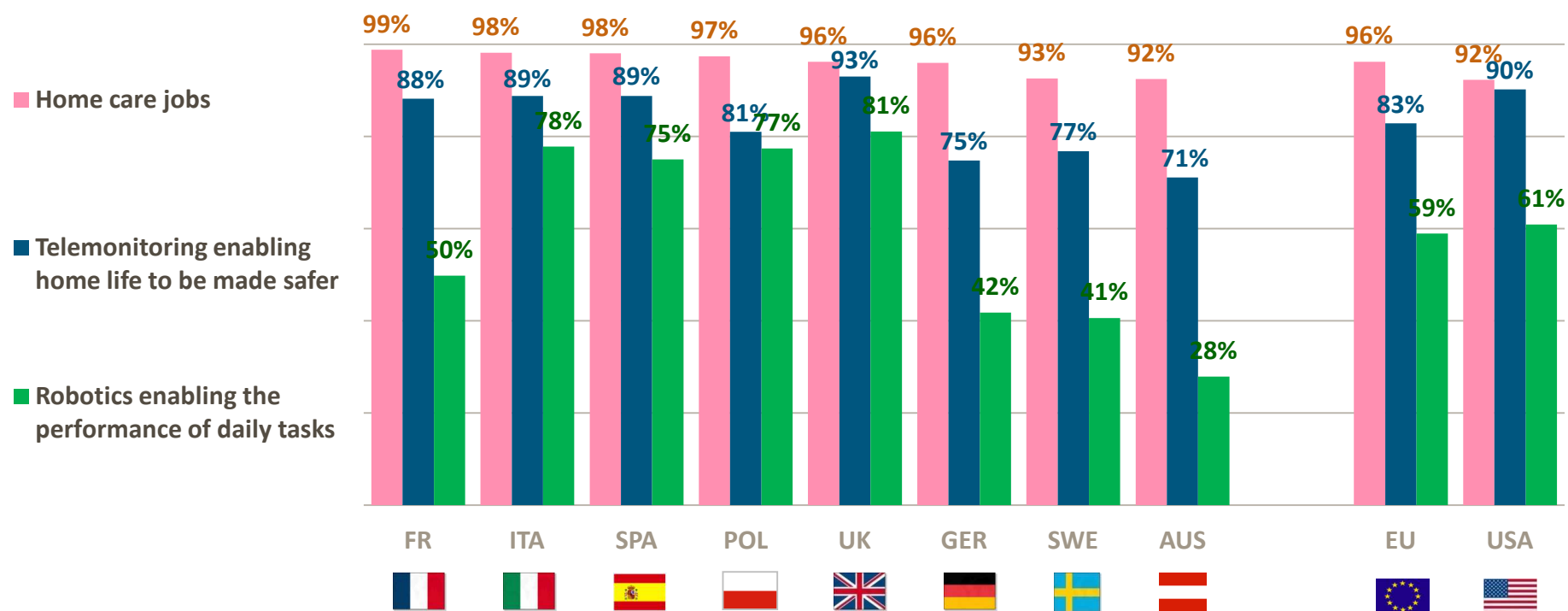
Source of support for home care in 2013

Outside of their family, from which organisation can elderly and dependent people find the best home care support?



Home carers in 2013

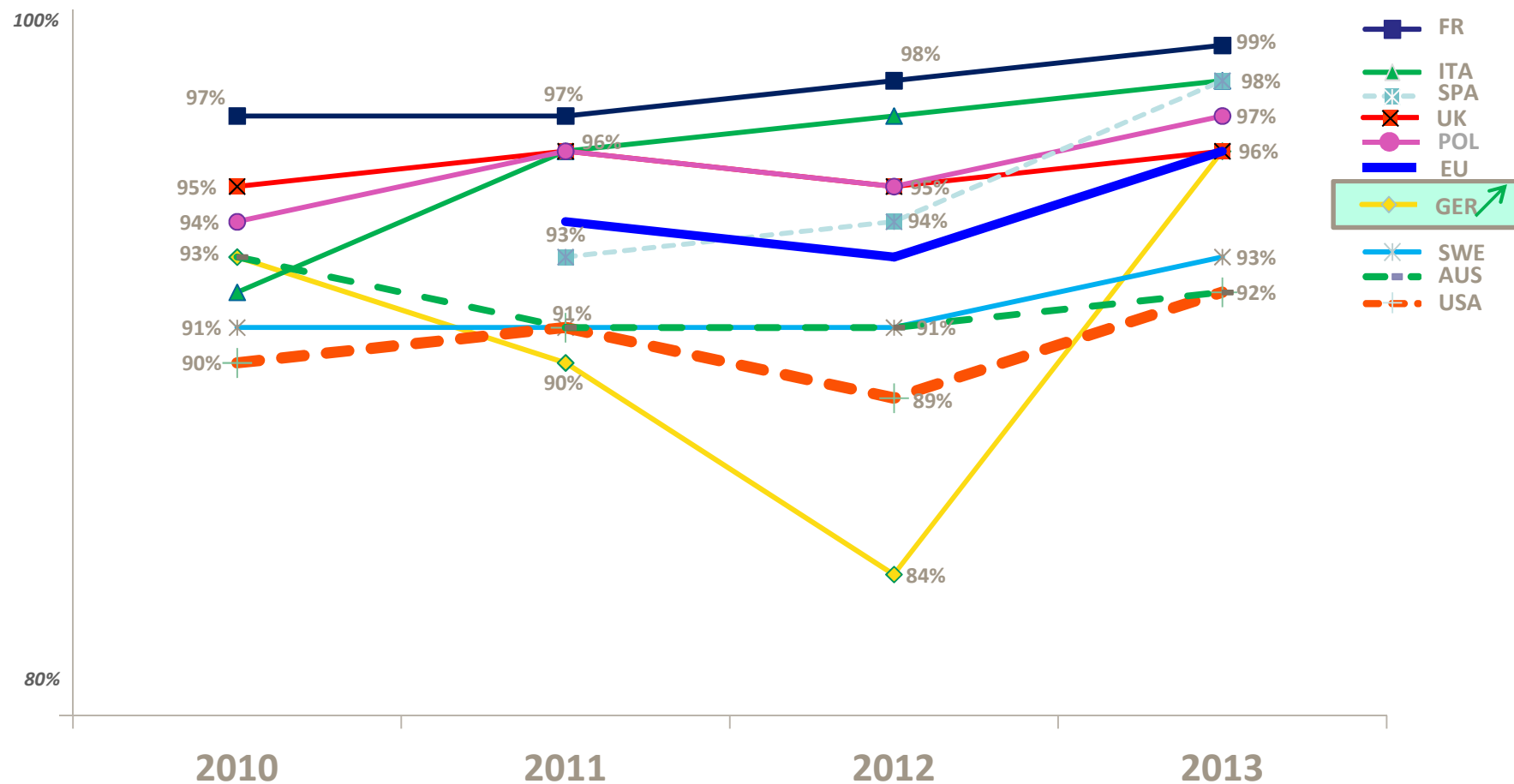
In order to prolong the home care of elderly and dependent people, what is the priority?



Home carer jobs - Developments

Priority given to home carer jobs

Development of opinions regarding home care workers since 2010
% of "YES" responses



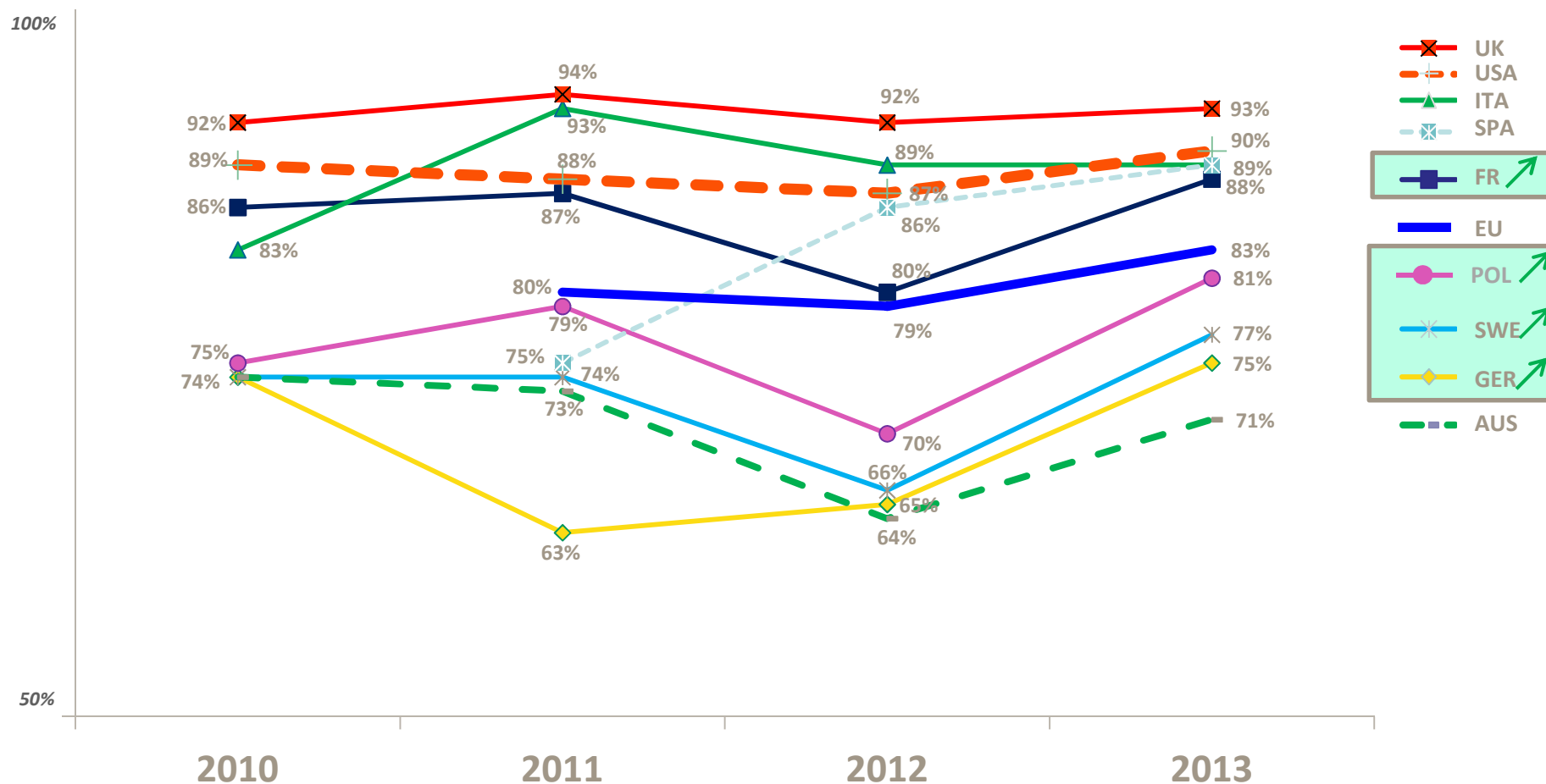
Telemonitoring - Developments

Priority given to telemonitoring in order to make home life safer

Development of opinions regarding home care workers since 2010

% of "YES" responses

↗ 2013 significantly higher than 2012
↘ 2013 significantly lower than 2012

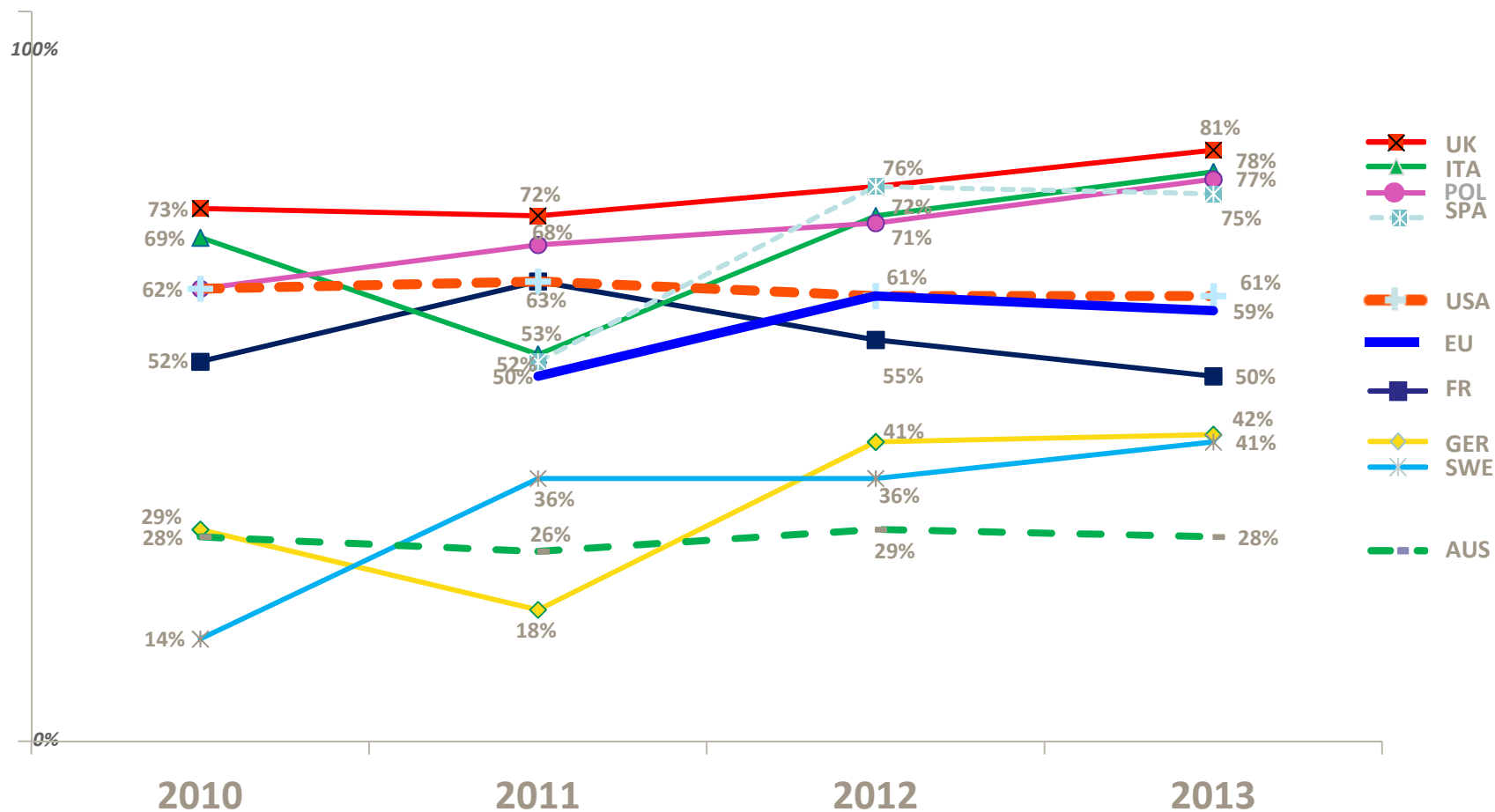


Robotics - Developments

Priority given to robotics in order to perform daily tasks

Development of opinions regarding home care workers since 2010

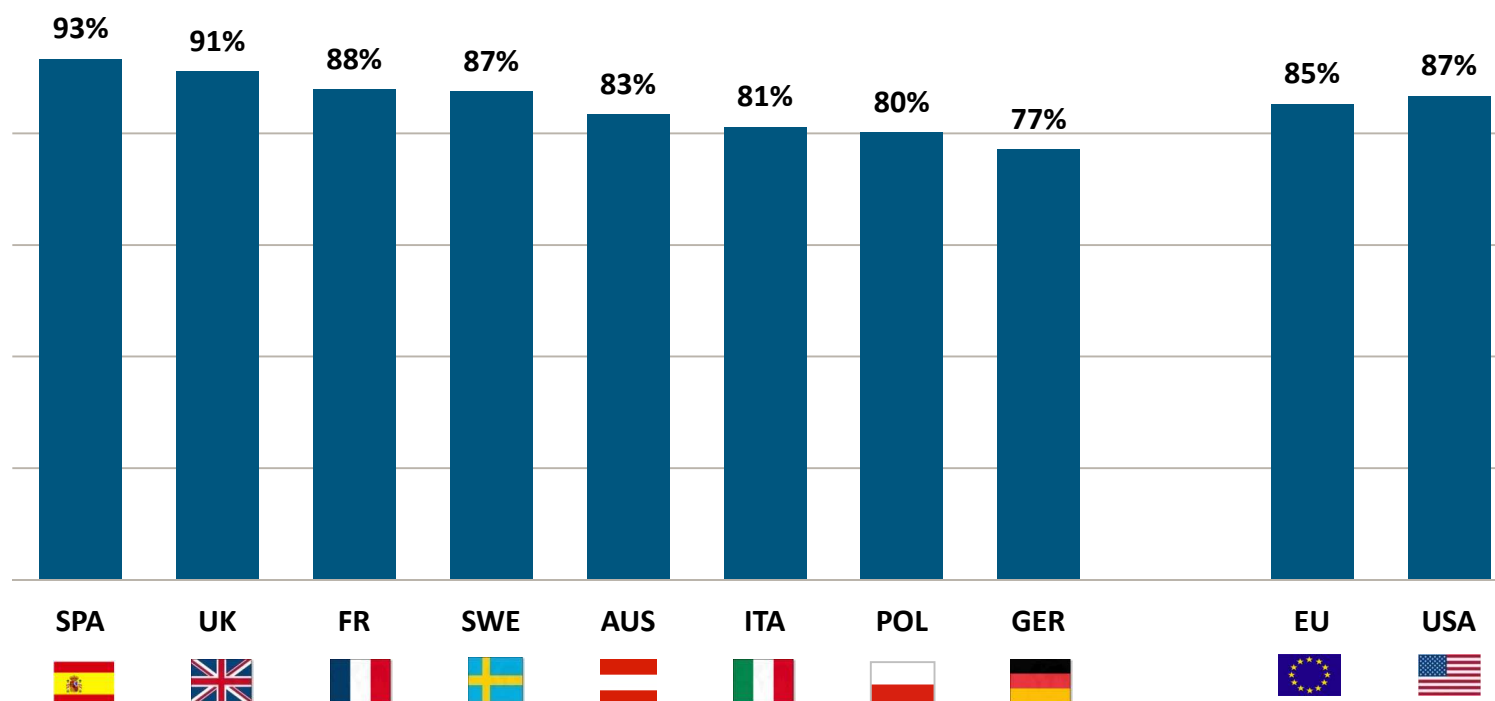
% of "YES" responses



Preference towards telemonitoring to make home life safer in 2013

Are you prepared to equip your elderly relatives with remote monitoring systems such as an electronic bracelet, a fall detector or continual blood pressure monitoring in order to make their home life safer?

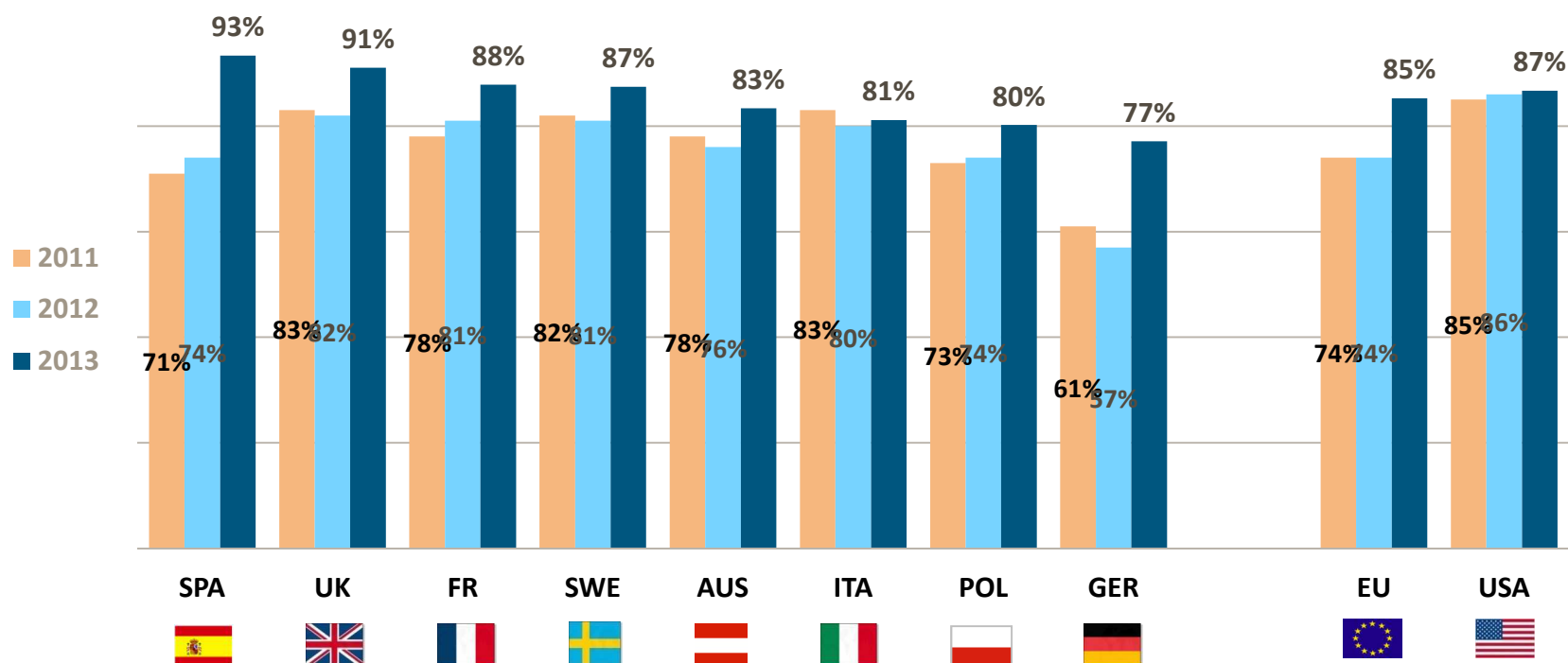
% of "Yes" responses



Preference towards telemonitoring to make home life safer in 2013 - Developments

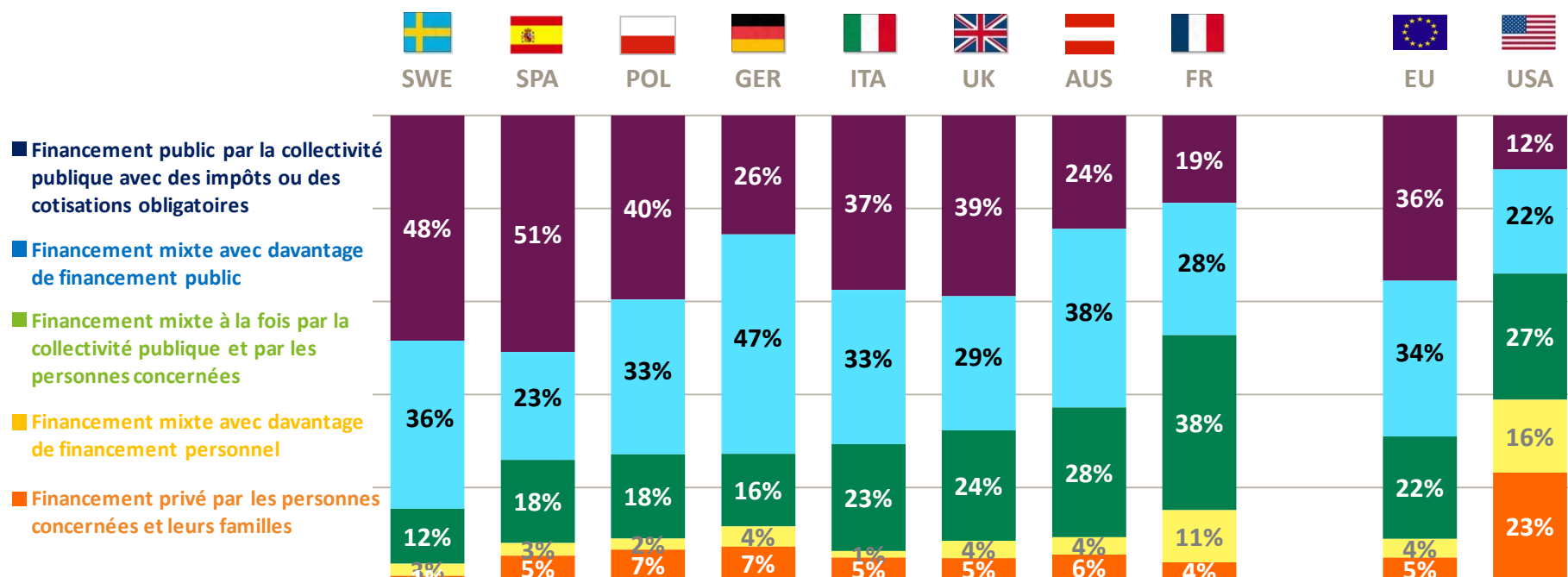
Are you prepared to equip your elderly relatives with remote monitoring systems such as an electronic bracelet, a fall detector or continual blood pressure monitoring in order to make their home life safer?

% of Yes responses - Developments since 2011



The financing of home care in 2013

Who should pay for the services and support in order to meet the daily needs of elderly and dependent people?



Total Public financing

Public financing by the public government with taxes or compulsory contributions + Mixed financing with an emphasis on public financing

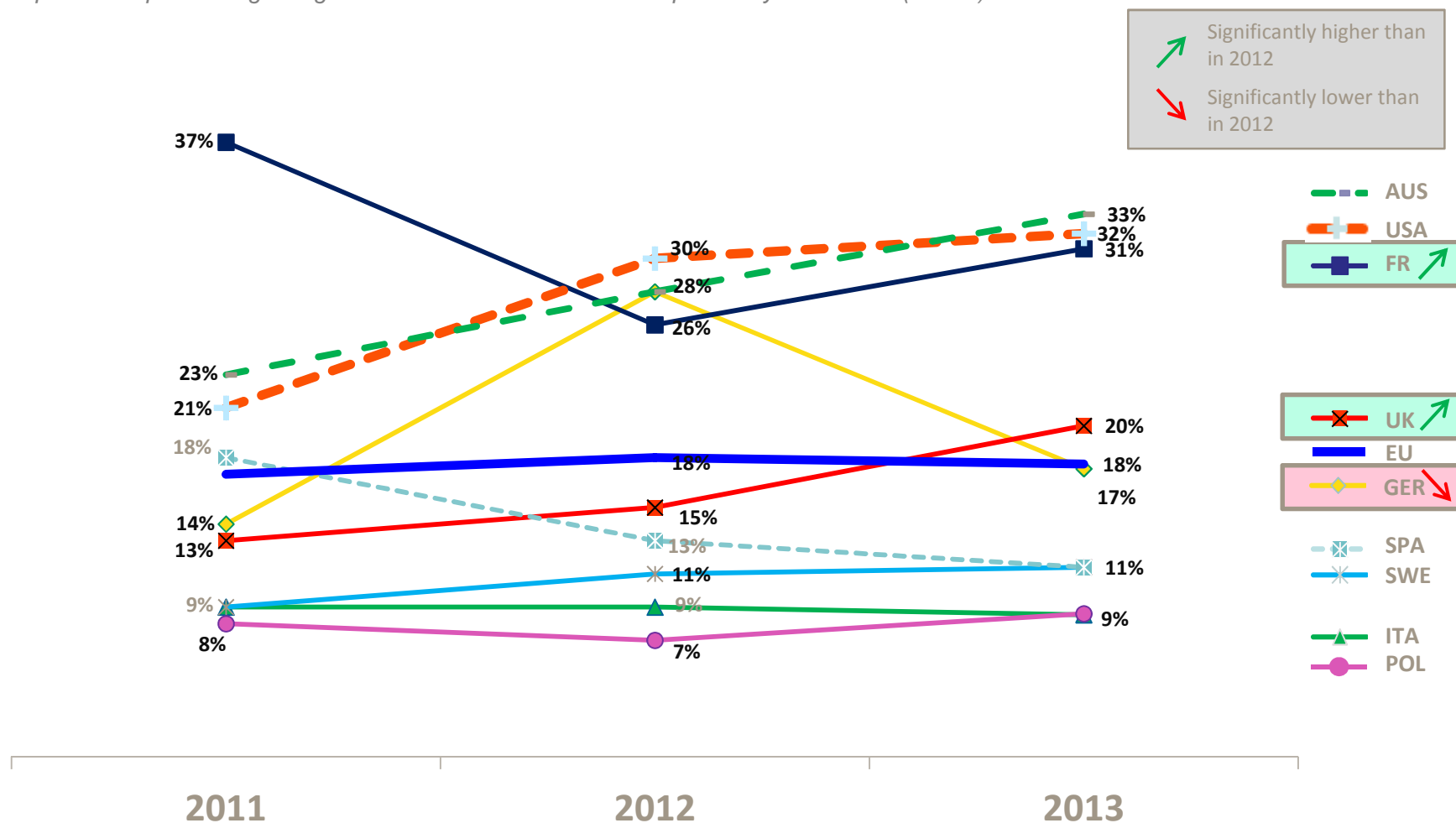
2013	84%	74%	73%	73%	70%	68%	62%	47%
2012	84%	67%	70%	68%	74%	68%	62%	56%

70%	34%
69%	35%

Awareness of the issue of dependency - Developments

In your opinion, are the public authorities in your country fully aware of the issue of dependency?

Development of opinions regarding the awareness of the issue of dependency since 2011 (% Yes)





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