



CHAM | IPSOS SURVEY

HEALTH GOVERNANCE VIEWED BY EUROPEANS

July 2019





METHODOLOGICAL APPROACH

RECAP

Research set-up



SAMPLING METHOD

Sample: samples created through a random draw from the base of panellists eligible for the study.



TARGET QUESTIONED

Nationally representative samples of 200 people aged 18 and over in each of the 5 countries, obtained using the quota method.



DATA COLLECTION

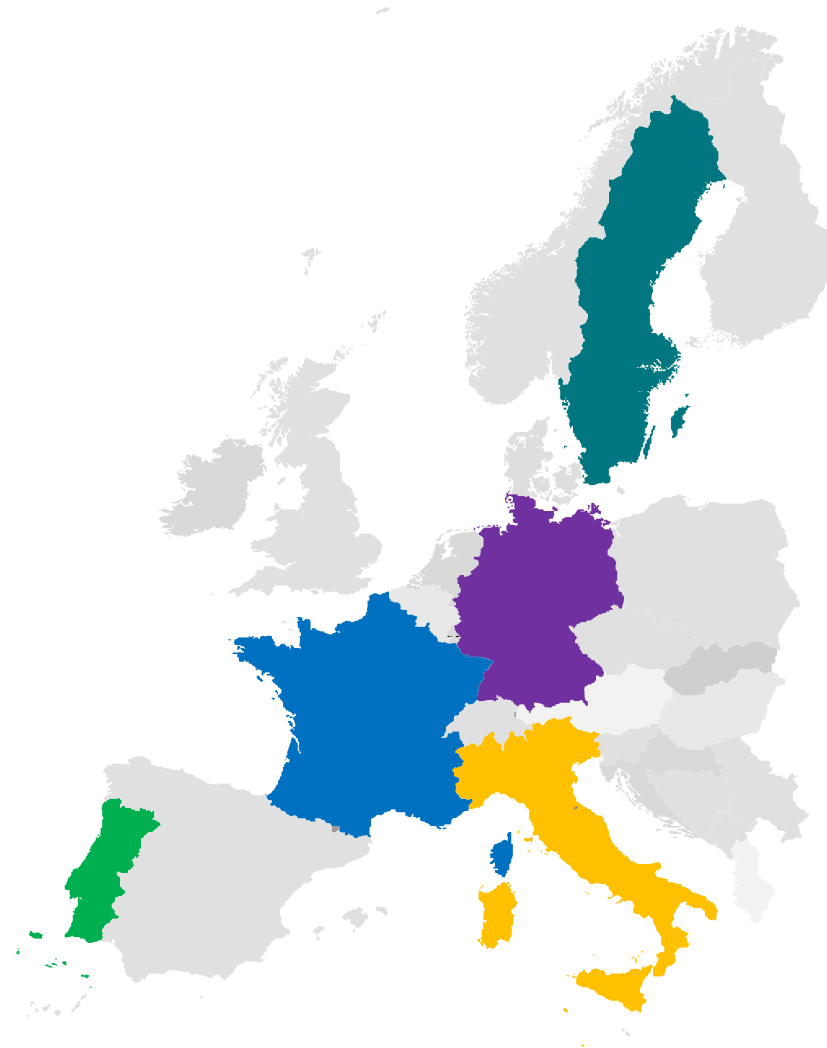
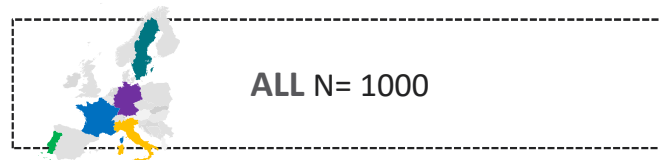
- Online on CAWI system
- Fieldwork dates: from 19 June to 4 July 2019



STATISTICAL PROCESSING

Sample weighted using the Rim Weighting method

The countries questioned as part of the survey

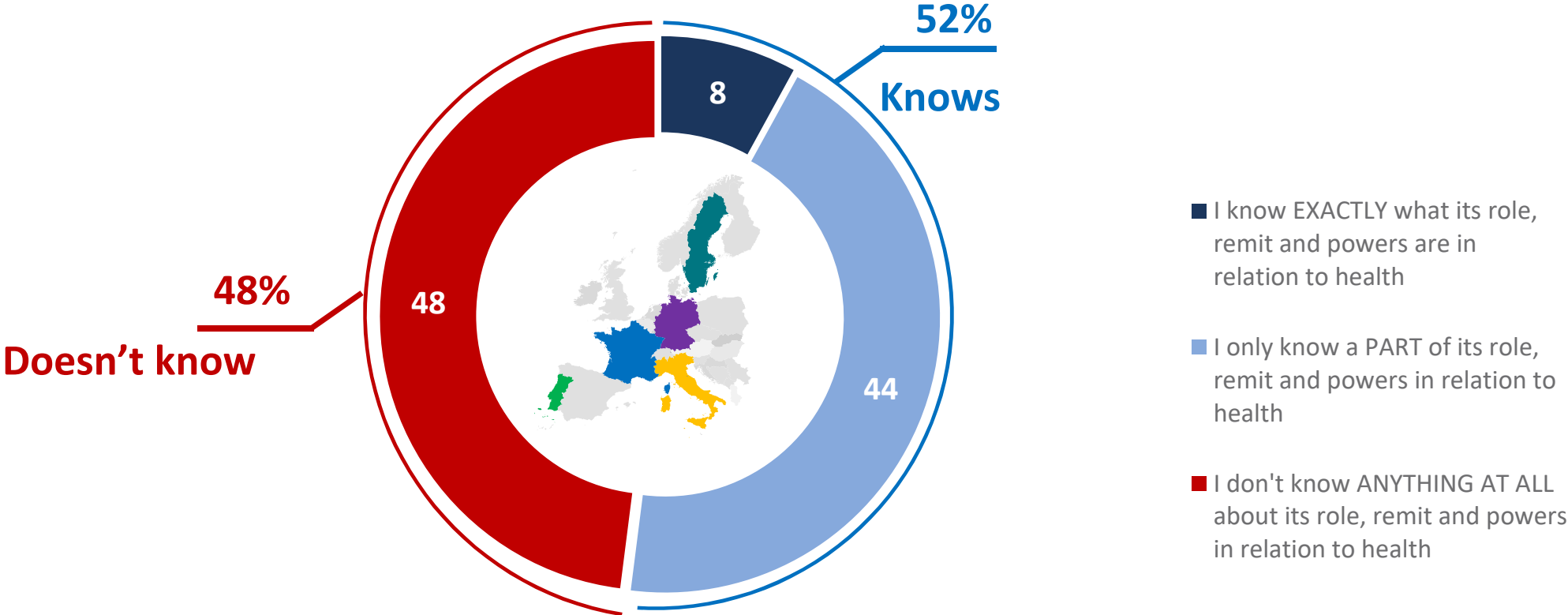




The European Union and the health system in European countries: conspicuously absent?

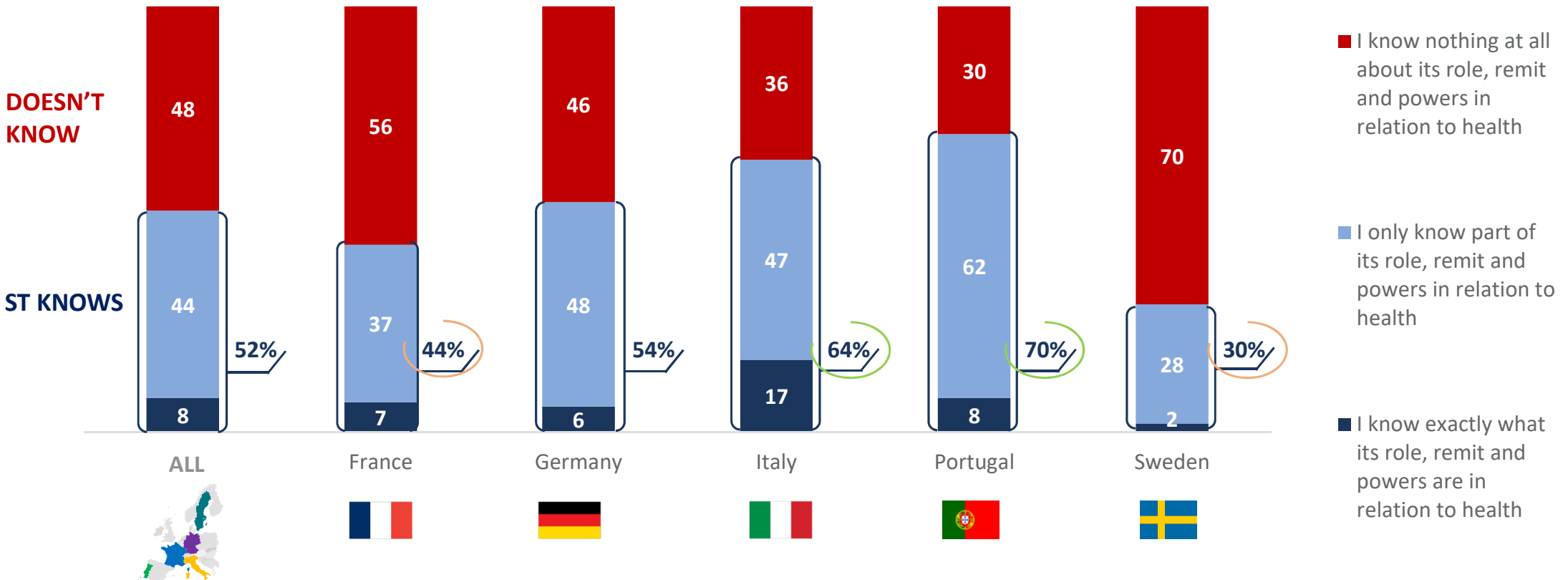
Europeans are not familiar with the role the European Commission plays in the health field. While they believe that decisions made by the EU have an impact on the public policies of their country, they are at the same time incapable of saying in what way those decisions could improve the quality of the health system in their country.

Scarcely more than one out of two Europeans claimed to be familiar with the role the European Commission plays in health in the European Union: a very relative knowledge since only 8% of them have a precise knowledge of it.



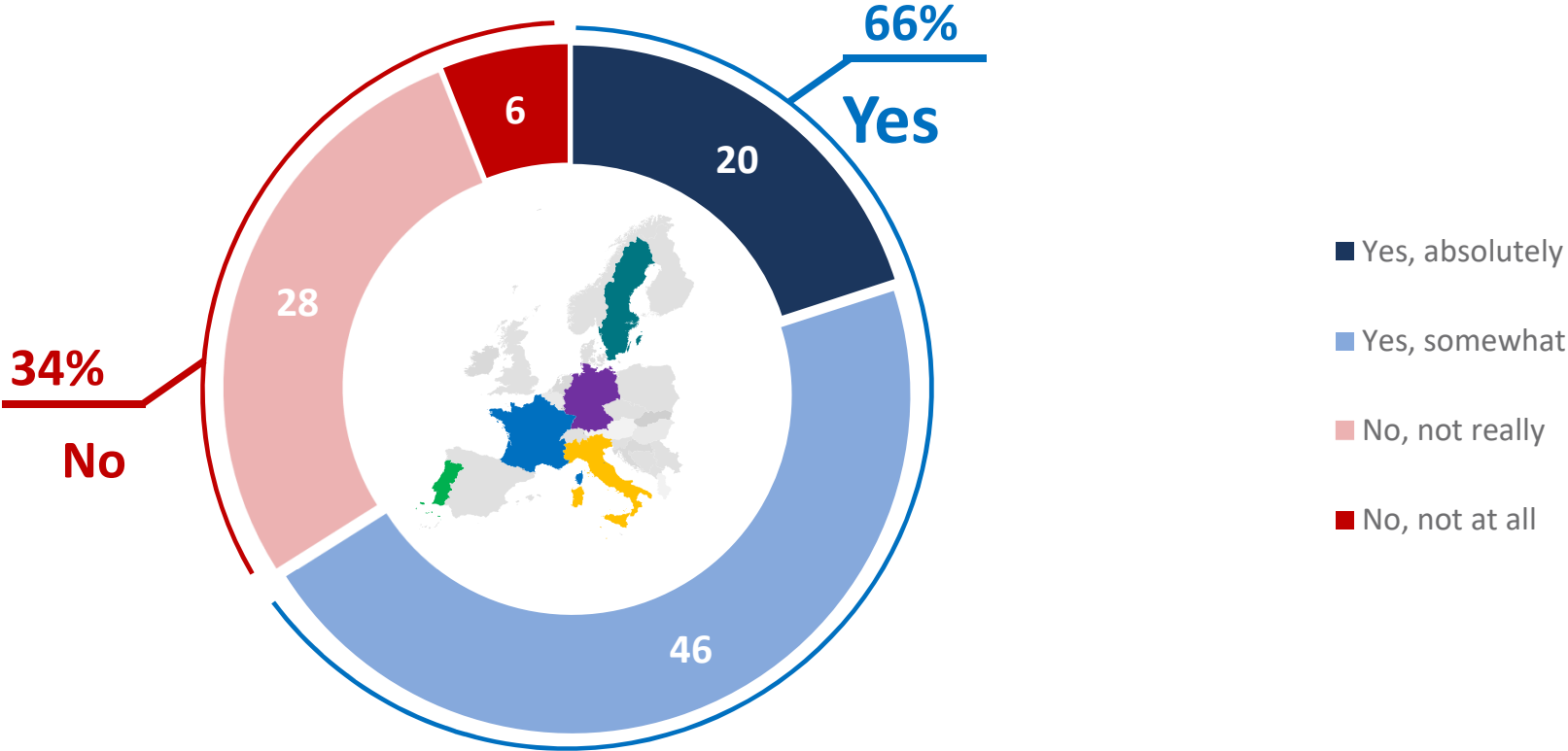
Q. Which of the following statements do you feel closest to concerning the role the European Commission plays in relation to health in the European Union?

Major splits appeared between the countries: whereas the Italians and Portuguese demonstrated a good knowledge, at least for two-thirds of them, the French and especially the Swedes clearly seemed lagging in this respect.



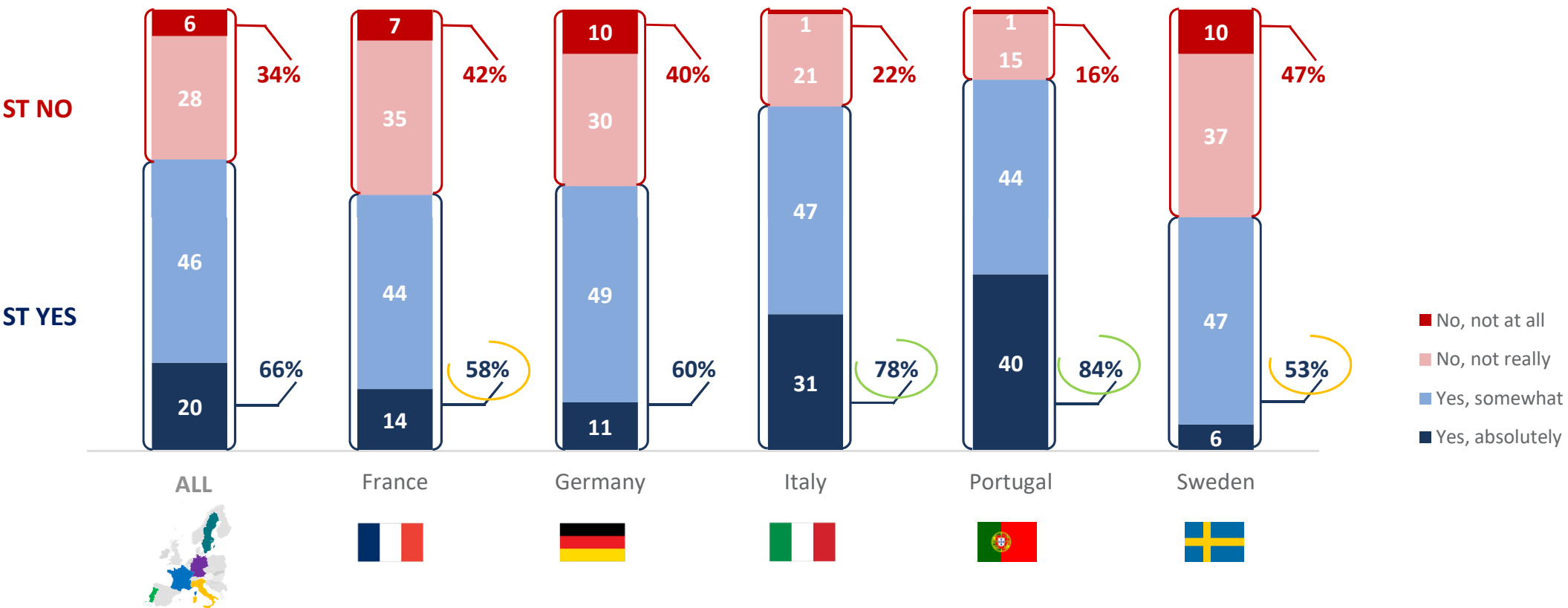
Q. Which of the following statements do you feel closest to concerning the role the European Commission plays in relation to health in the European Union?

However, despite less knowledge of the Commission’s actual remit in relation to Health in the European Union, two-thirds of Europeans claimed to be interested in it: an interest that is more relative than very affirmed.



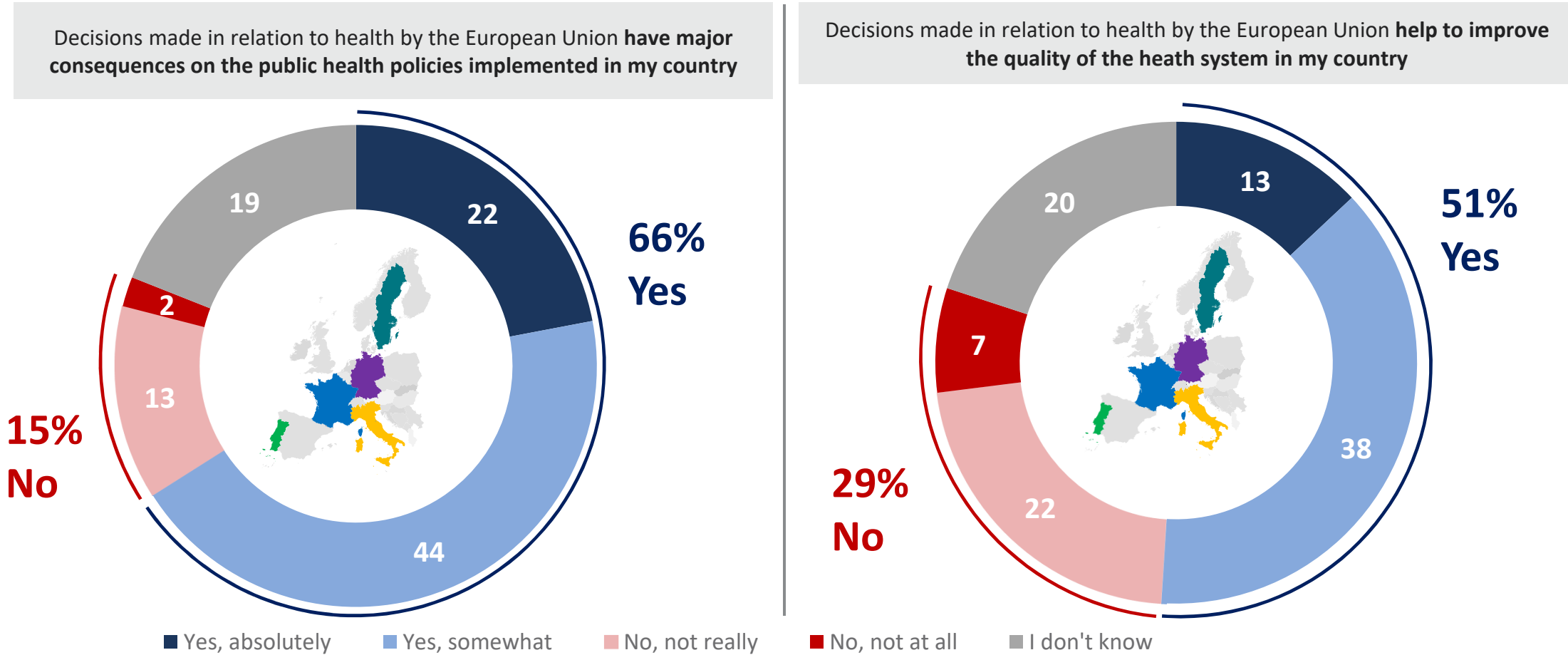
8 Q. Concerning the role of the European Commission in relation to health in the European Union, would you say that this is a subject that interests you...?

The Portuguese and Italians, who know more on the subject, showed the greatest interest, far ahead of the French and Swedes, of whom only a small majority are interested in the European Commission’s role in health in the EU.



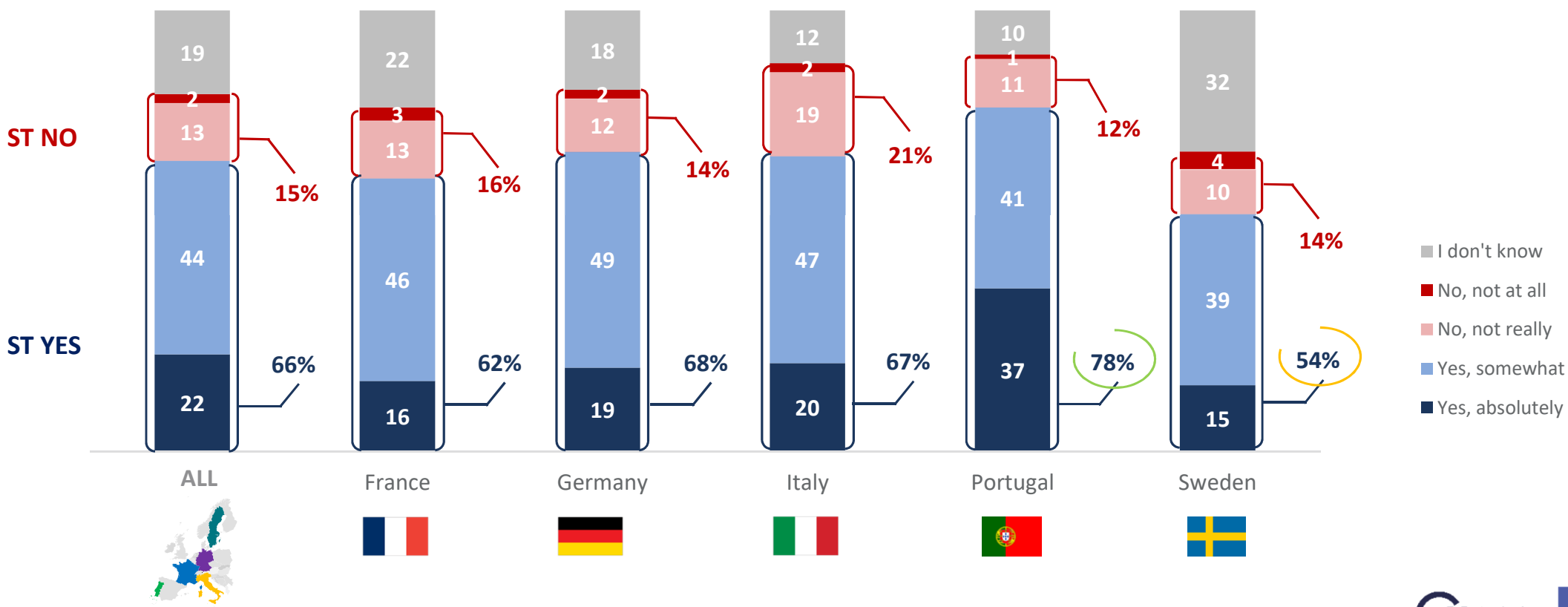
9 Q. Concerning the role of the European Commission in relation to health in the European Union, would you say that this is a subject that interests you...?

Europeans have noticed the impact of health-related decisions made by the EU on public policies in their country much more than on any actual improvements in the quality of the system.



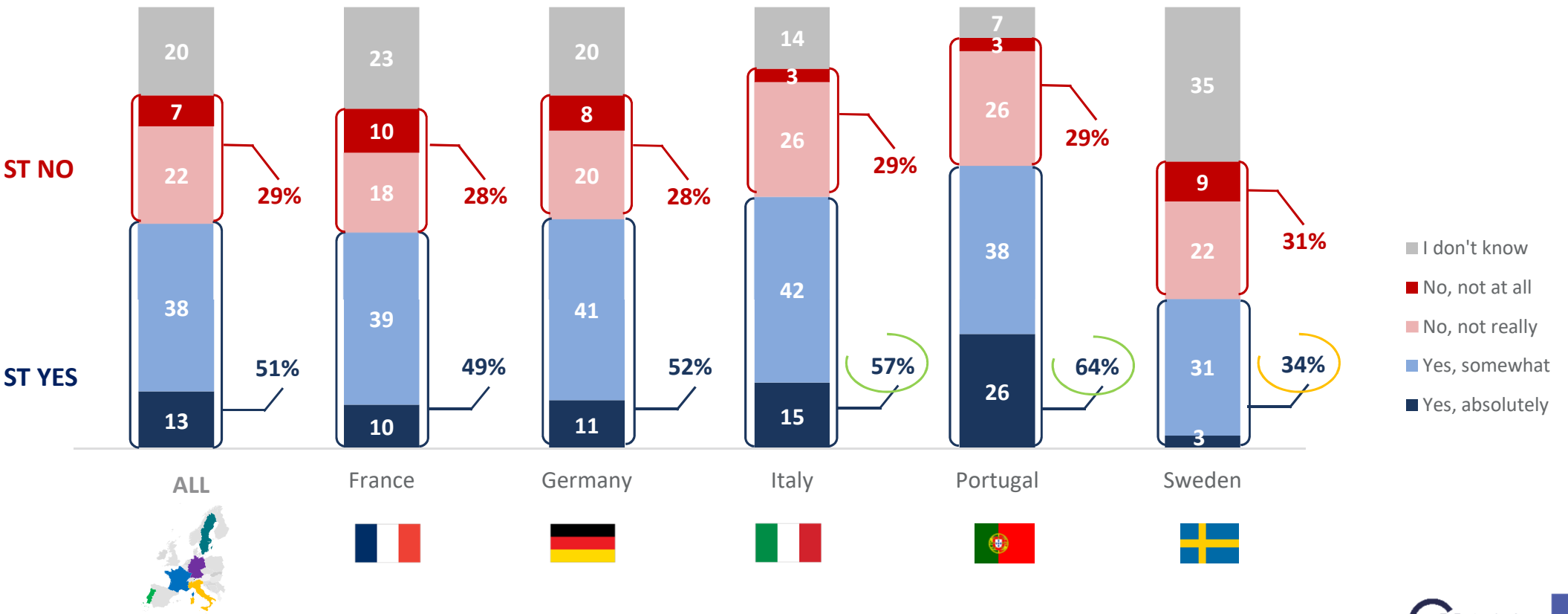
A majority agreed in saying that EU decisions have major consequences on the public health policies implemented in their country. Opinions were strongest in Portugal, Germany and Italy.

Decisions made in relation to health by the European Union have major consequences ON PUBLIC HEALTH POLICIES implemented in my country



More Portuguese, Italians and Germans have noticed the positive consequences of decisions made on health by the EU on the quality of the health system in their country, whereas the Swedes, the least knowledgeable (34%) are also the least convinced: real differences in perceptions.

The decisions made in relation to health by the European Union help to IMPROVE THE QUALITY OF THE HEALTH SYSTEM in my country



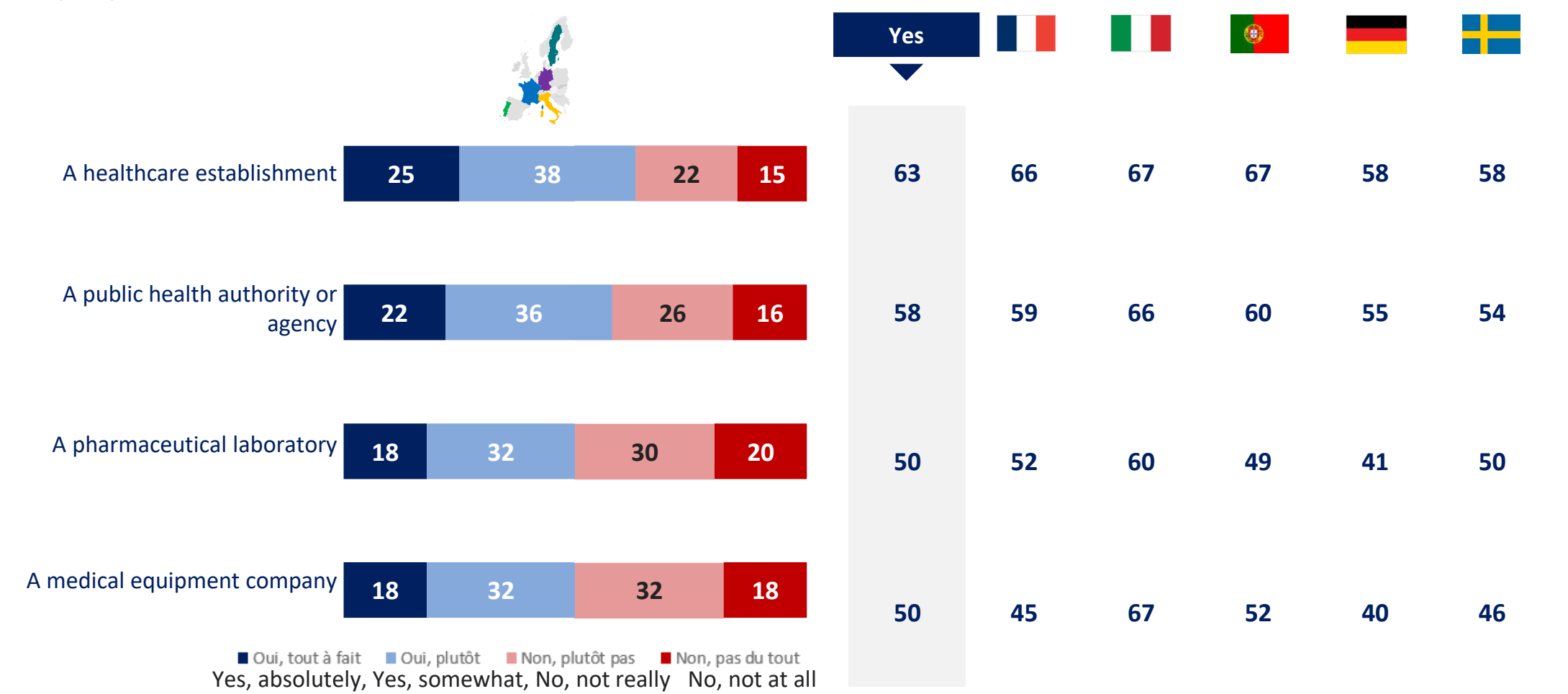


The citizen's rise to power in health governance and in participation in the decision-making bodies of large organisations

Many European citizens claim they would be “somewhat” willing to join the governing bodies for health care establishments and the health authorities. A phenomenon that is stronger in France, Italy and Portugal but not as strong in Germany and Sweden.

The desire to be involved is still very moderate today.

A majority of Europeans would be willing to be part of the Board of a healthcare establishment or a public health authority or agency; but they are still divided when it comes to a pharmaceutical laboratory or medical equipment company.



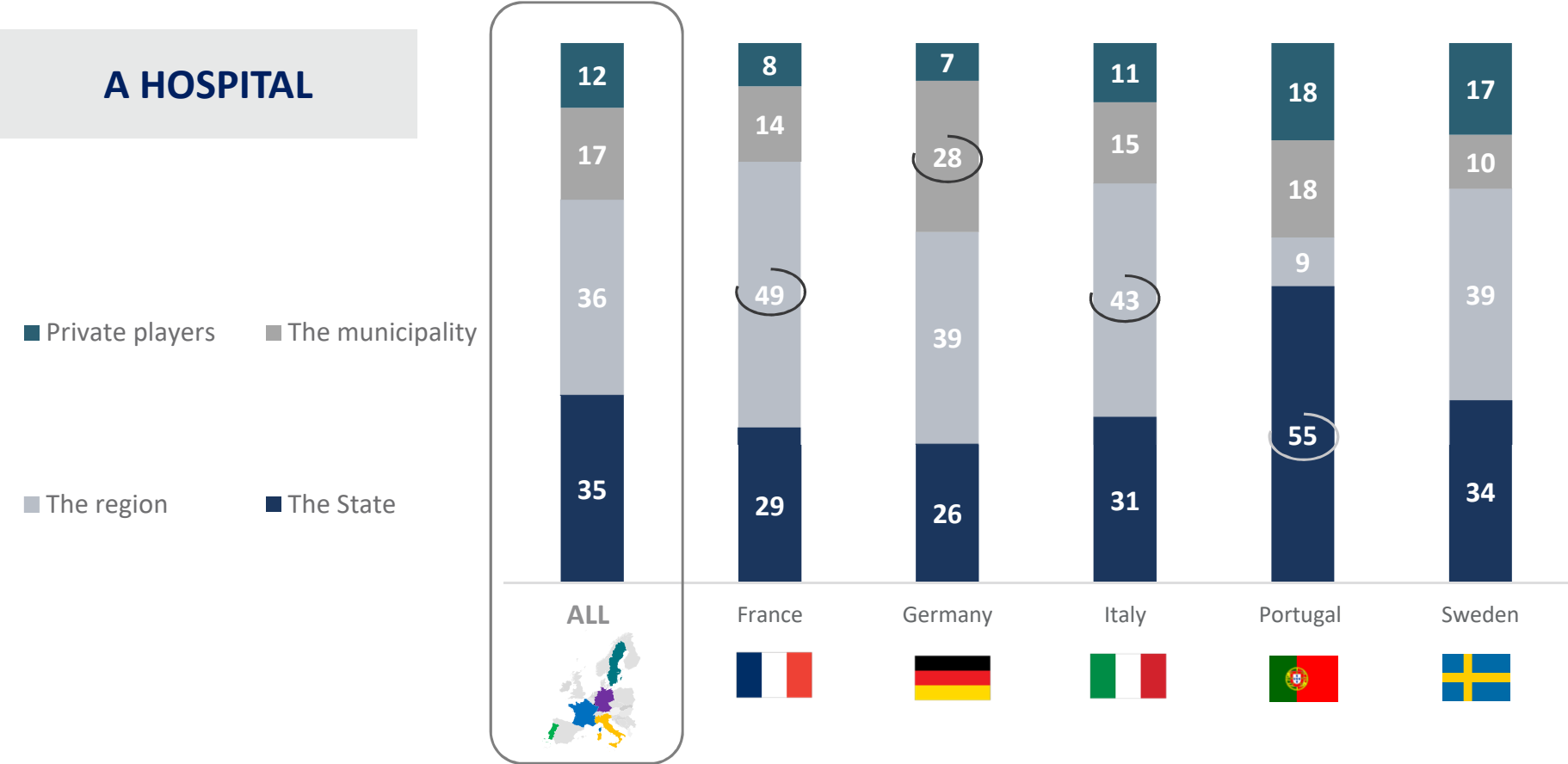
14 Q. For each of the following establishments, and if you were given the chance, would you be willing to be on the Board to take part in the vote on decisions made there?



At present, Europeans are inclined to trust the local and regional levels to ensure the correct operation of health establishments

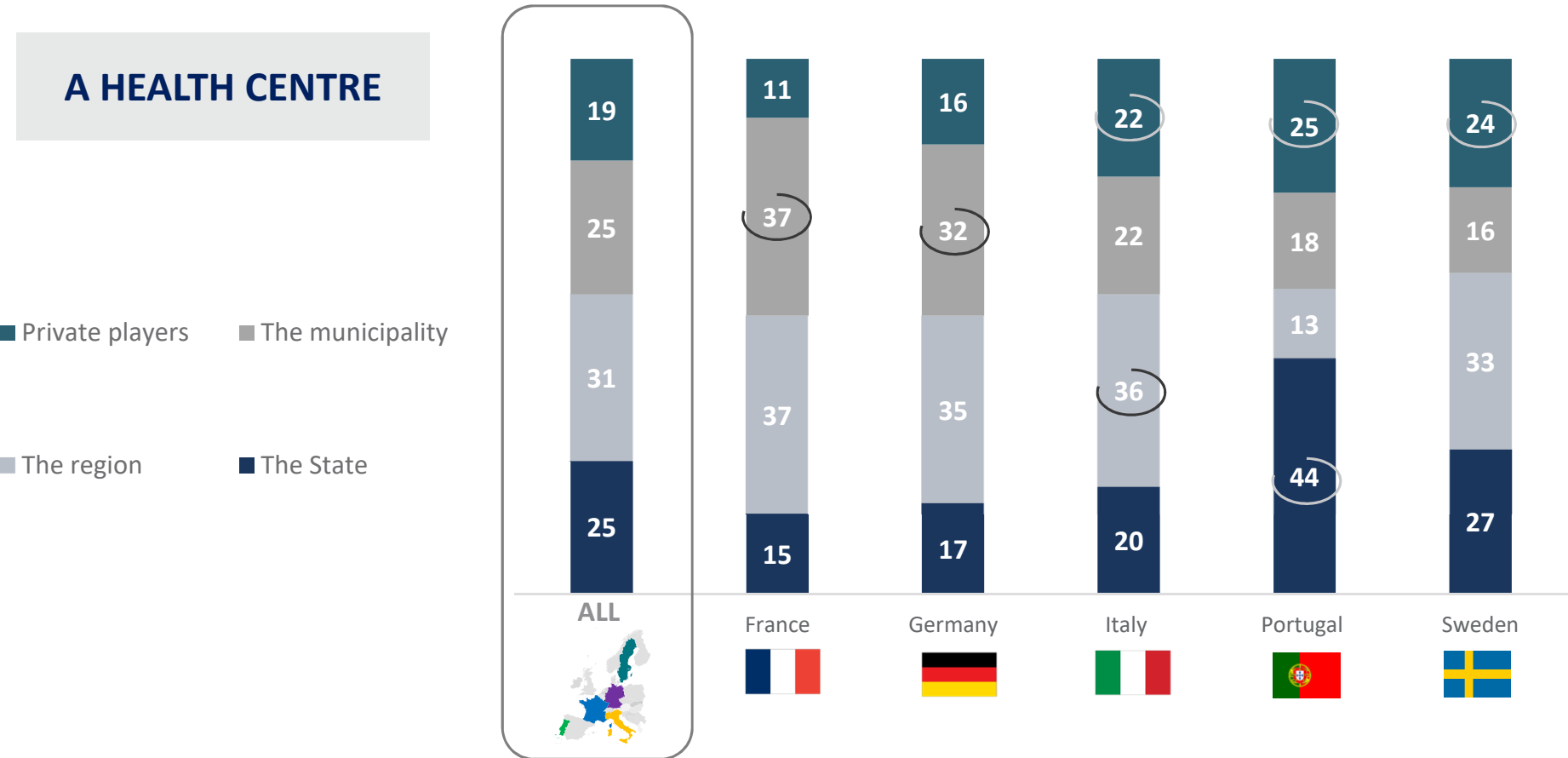
The State is being heavily challenged today by the region and municipality when it comes to its ability to ensure the correct operation of health establishments, while in certain countries, private players are starting to win trust in many citizens.

In all countries except Portugal, the region is currently the level Europeans trust most to ensure the correct operation of hospitals, far ahead of the State: a demand for greater proximity.



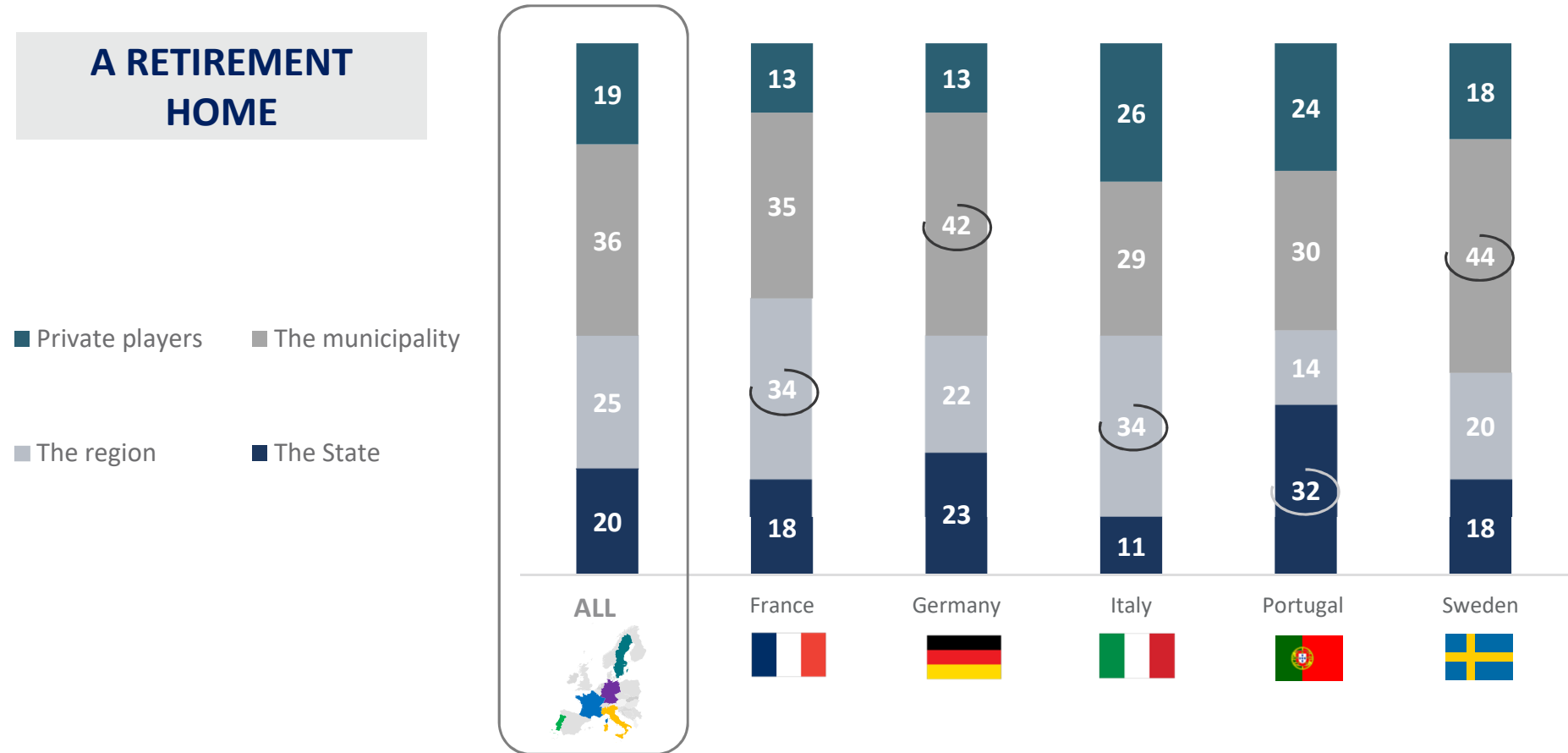
Q. Where you live, which of the following players would you trust most to ensure the correct operation of the following health establishments?

With regard to the correct operation of health centres, Europeans are very divided between the region, the State and the municipality: in Portugal, Italy and Sweden, private players enjoy a fairly high level of trust



Q. Where you live, which of the following players would you trust most to ensure the correct operation of the following health establishments?

Europeans more frequently put their trust in the municipality to ensure the correct operation of retirement homes (especially in Sweden, Germany and France), the State only comes in 3rd, on a level very close to private players.



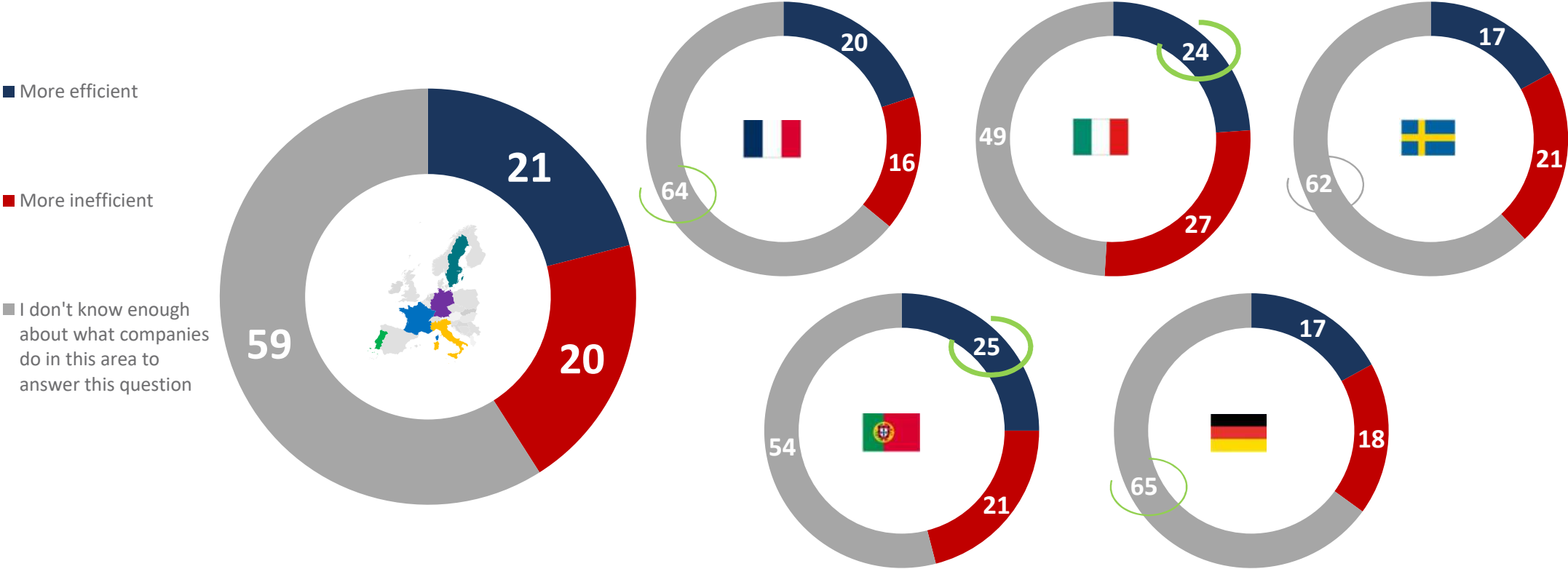
Q. Where you live, which of the following players would you trust most to ensure the correct operation of the following health establishments?



The role of the company and of CSR policies in covering employees' health is still not familiar to Europeans and isn't really convincing.

Companies' investment in CSR policies is so unfamiliar today that only a minority of Europeans were capable of commenting on their effectiveness. Those who did so were very split.

The role companies play in improving their employees' health thanks to their CSR policies is something Europeans know very little about today. The Portuguese and Italians, often more inclined to trust private sector players, are the most convinced of their effectiveness... but also the most distrustful.



Q. A number of companies have committed to CSR actions aimed at responding to environmental, societal and ethical challenges. In your opinion, are the CSR actions implemented by companies to improve employees' health generally... ?



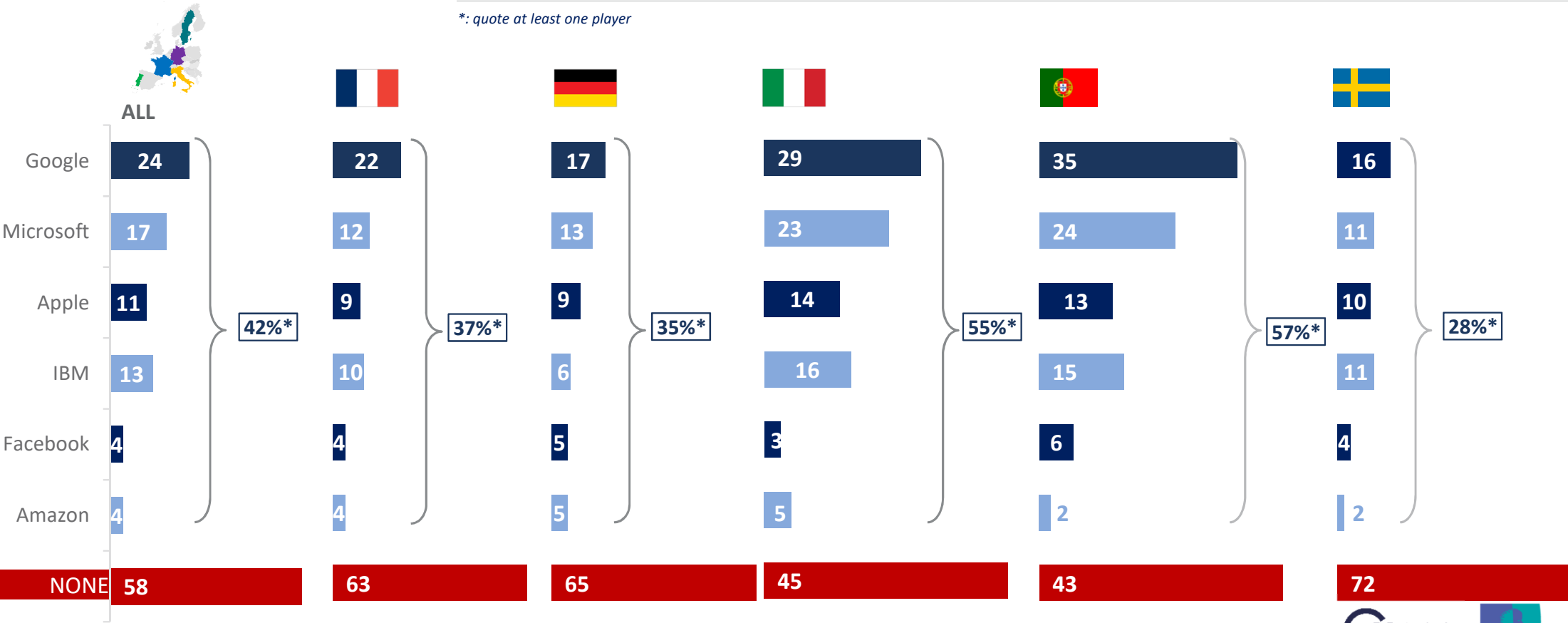
A risk of disruption in terms of health governance: the GAFAMI currently enjoy a high level of trust among a large number of Europeans to deal with a part of their healthcare journey.

While the large majority of Europeans do not trust them, many would however be willing to do so on certain subjects. In Portugal and Italy, a majority of respondents trust them for certain phases of their healthcare journey.

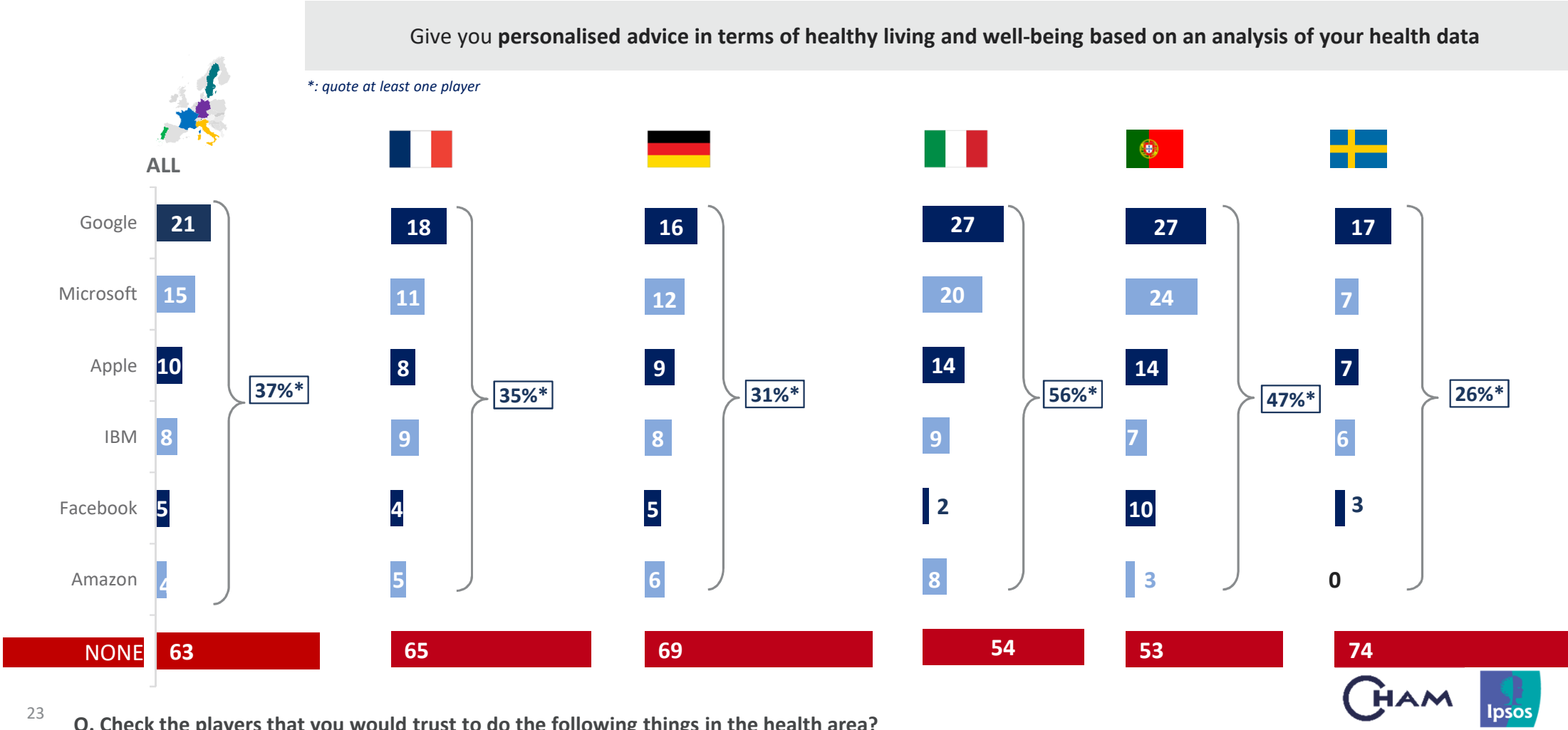
A very large number of Europeans trust the GAFAMI today to bring progress in research through an analysis of their health data, particularly in France and Germany (over 1/3 of citizens, but especially in Portugal and Italy, more than 1 out of 2 people).

Analyse the health data of a very large number of people like yourself to bring progress in research

*: quote at least one player



When it comes to primary prevention, a majority of Europeans are still reluctant about the idea of trusting the GAFAMI in terms of giving them personalised advice about healthy living and well-being. However, almost half of Italians and Portuguese claimed to trust them to give them advice.



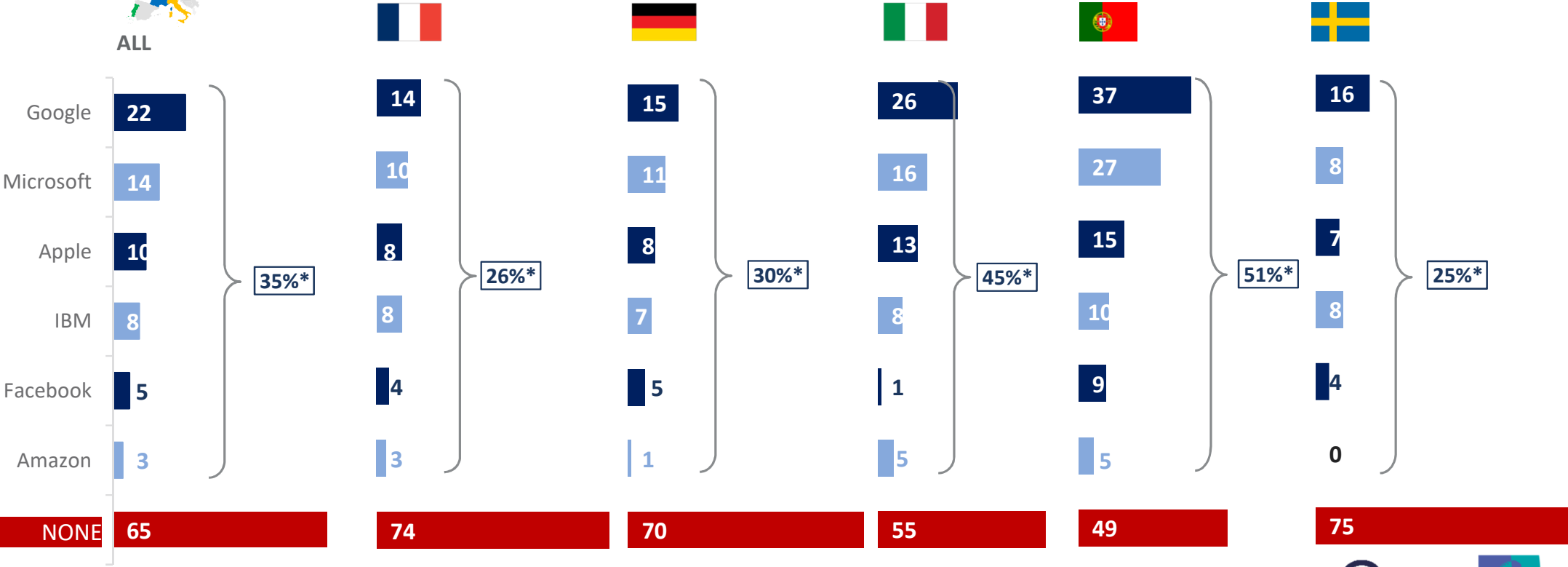
Over 1/3 of Europeans would trust the GAFAMI today to alert them of risks of a health problem based on an analysis of their health data: even stronger support for this idea in Italy and especially Portugal, where more than 1 out of 2 citizens would put their trust in the GAFAMI.

Alert you about risks of illness or health problems that you might experience based on an analysis of your health data

*: quote at least one player



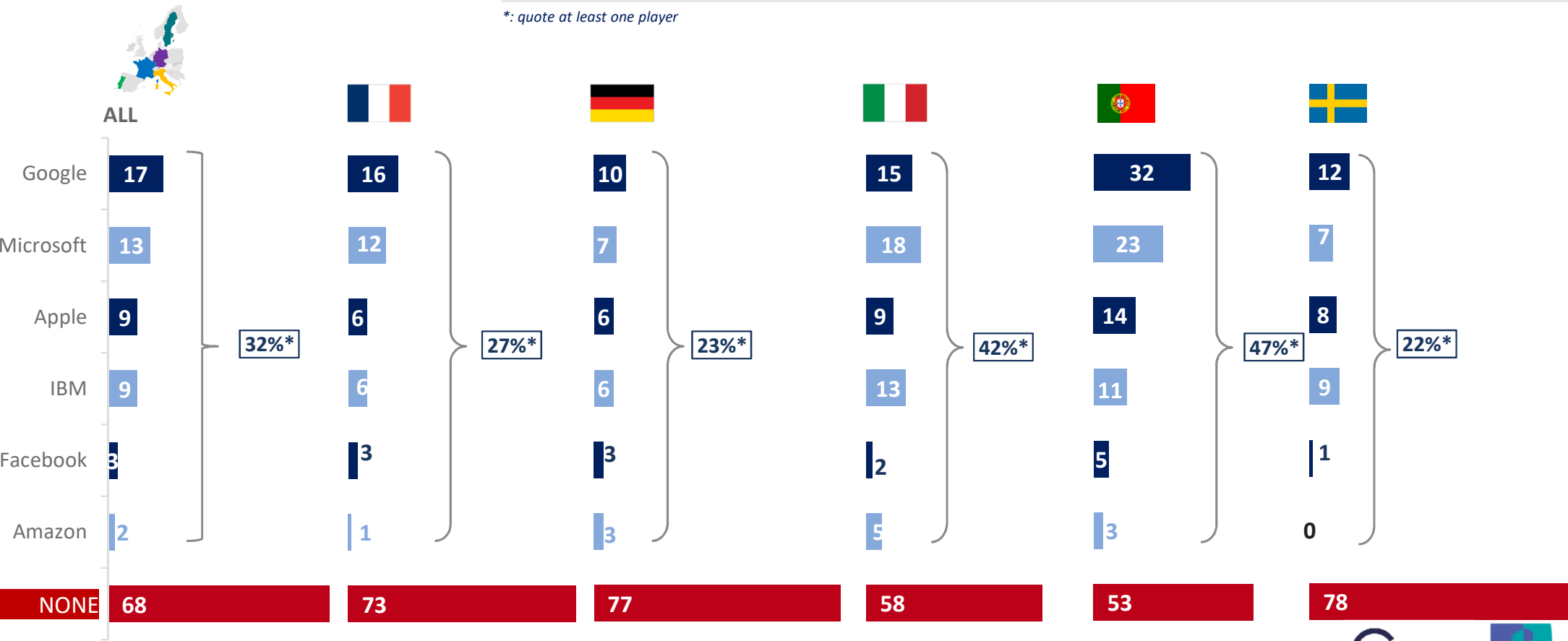
ALL



On the other hand, a very small minority of Europeans trust the GAFAMI to diagnose health problems, especially in Sweden and Germany.

Diagnose the health problems you experience, under your doctor's supervision

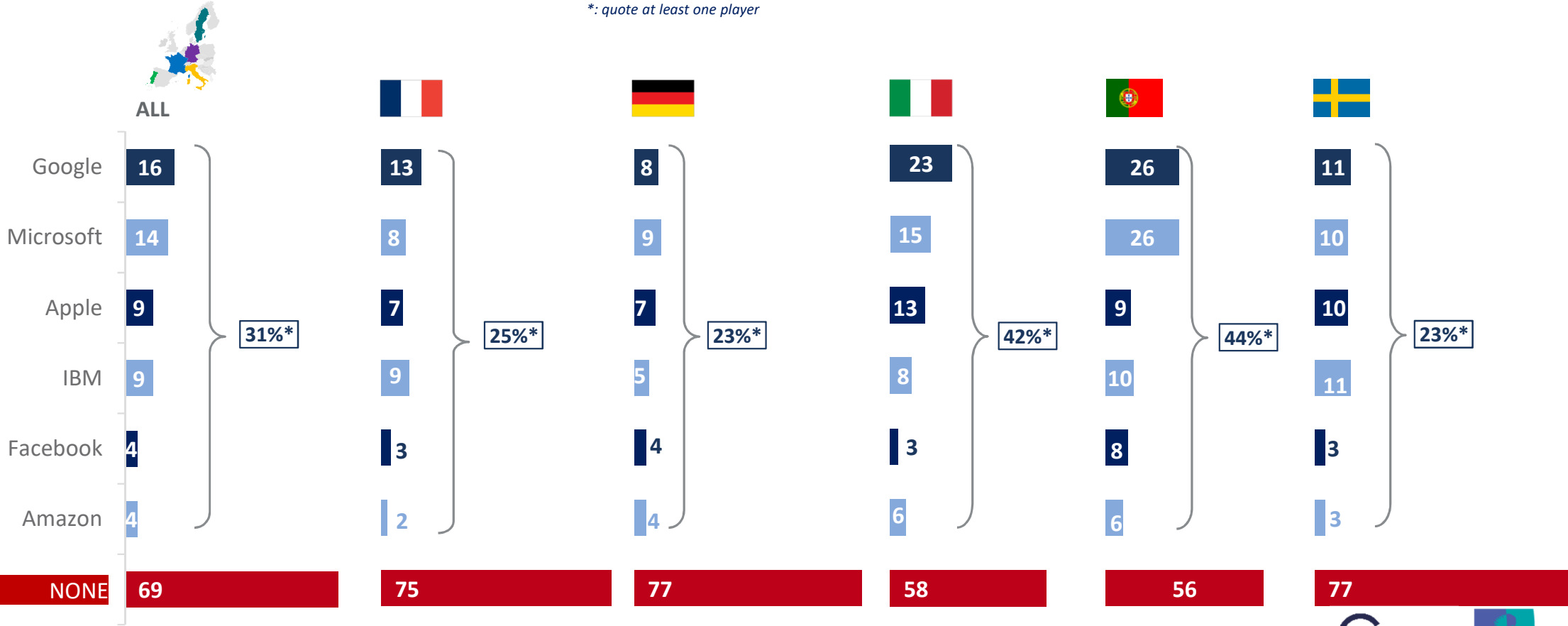
*: quote at least one player



And especially as concerns respecting the confidentiality of the health data entrusted to the GAFAMI, Europeans' level of trust is very low although there again almost 1/3 of them claim to trust the GAFAMI.

Respect the confidentiality of any health data that you might entrust them with

*: quote at least one player

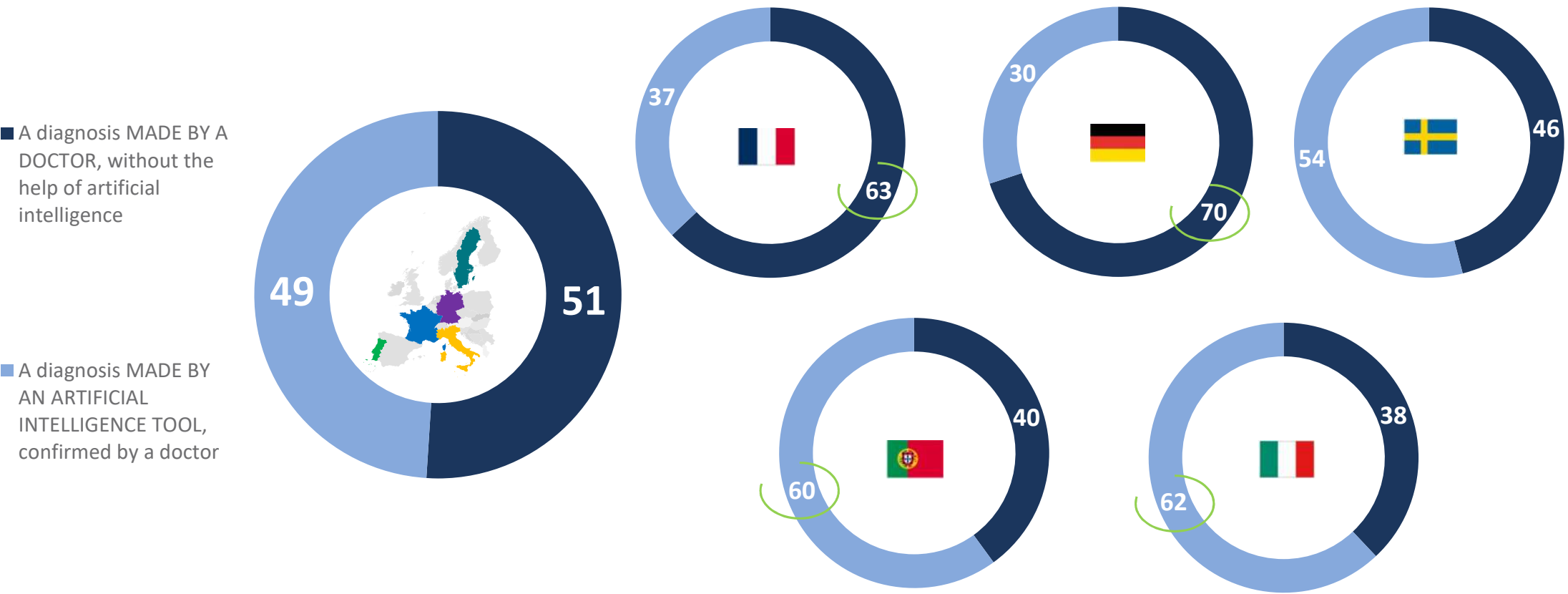




A lot of Europeans seem willing to see a radical change in the way their health system operates in a number of sensitive areas

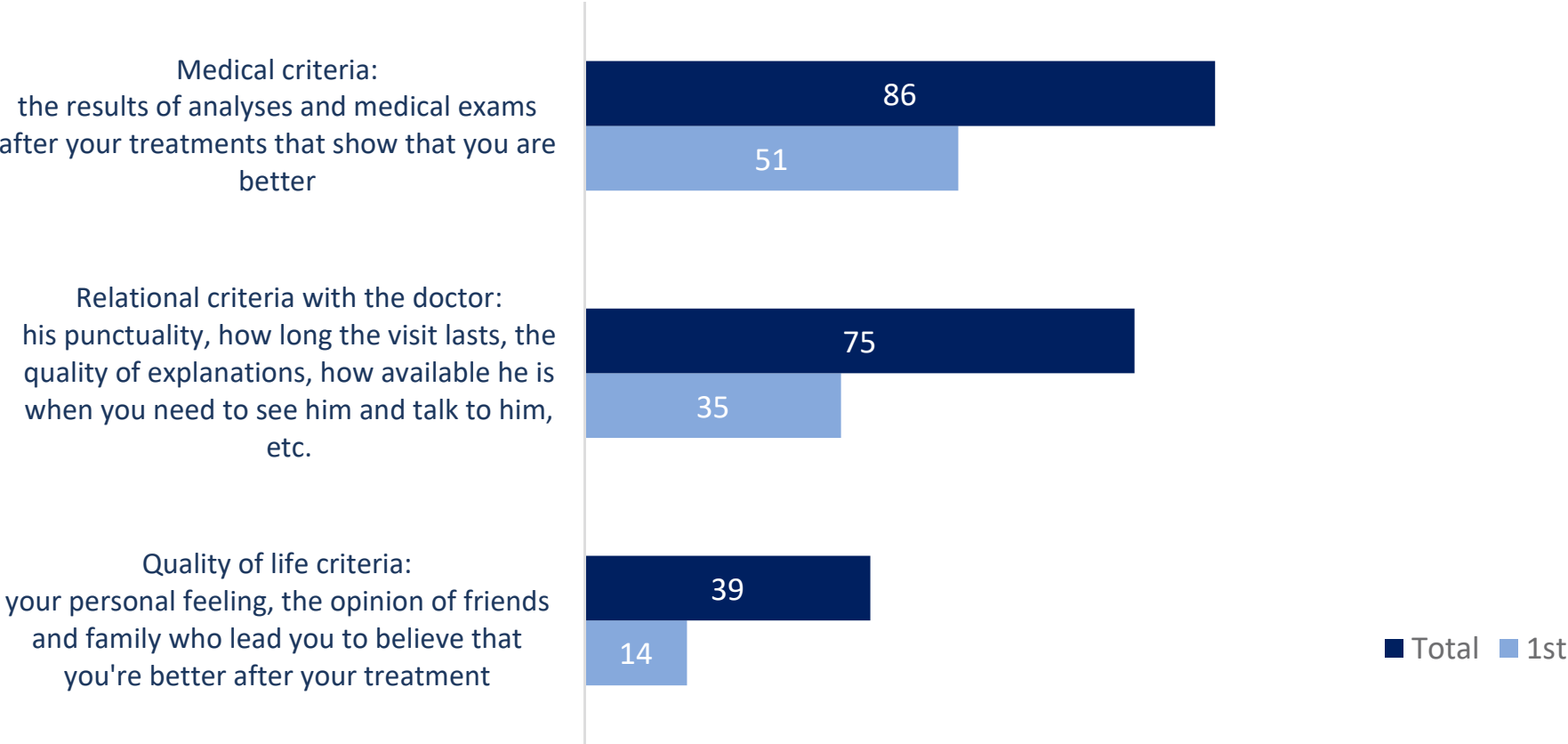
From the use of AI to make diagnoses to nurses being able to perform medical and surgical acts, many Europeans accept radical changes in their healthcare journey. These possibilities are however very differently appreciated in the different countries of the European Union.

As concerns the use of AI for producing a diagnosis, the level of acceptance is relatively high since almost 1 out of 2 Europeans would accept it if it is confirmed by a doctor: results are very different however within countries.



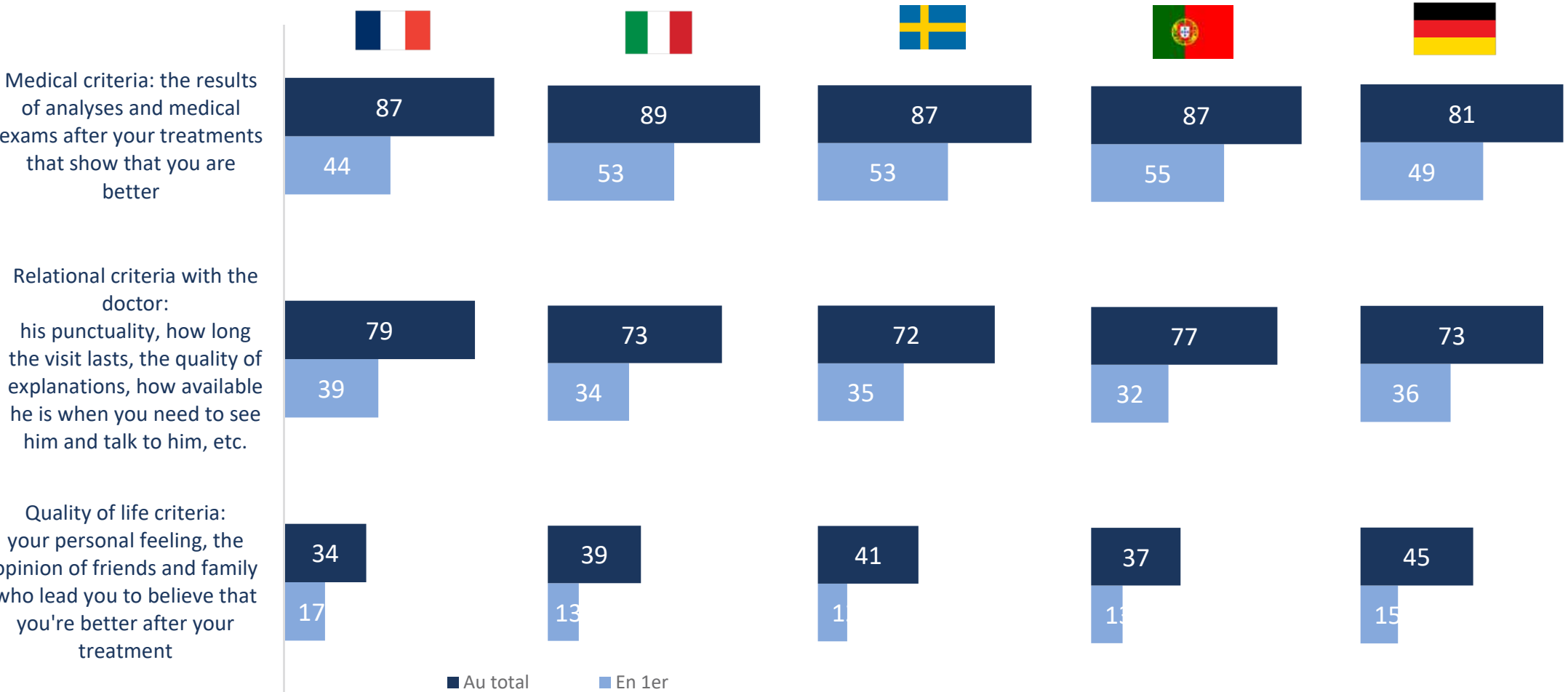
Q. If you were to do some medical exams tomorrow as a result of health problems, which type of diagnosis would you trust most?

As concerns the main factors in evaluating the quality of doctors' work in caring for patients, the relational aspect also takes on great importance in their eyes even if medical criteria logically continue to be prioritised.



Q. Which of the following criteria do you think are most important in evaluating the quality of doctors' work, during and at the end of your treatment?

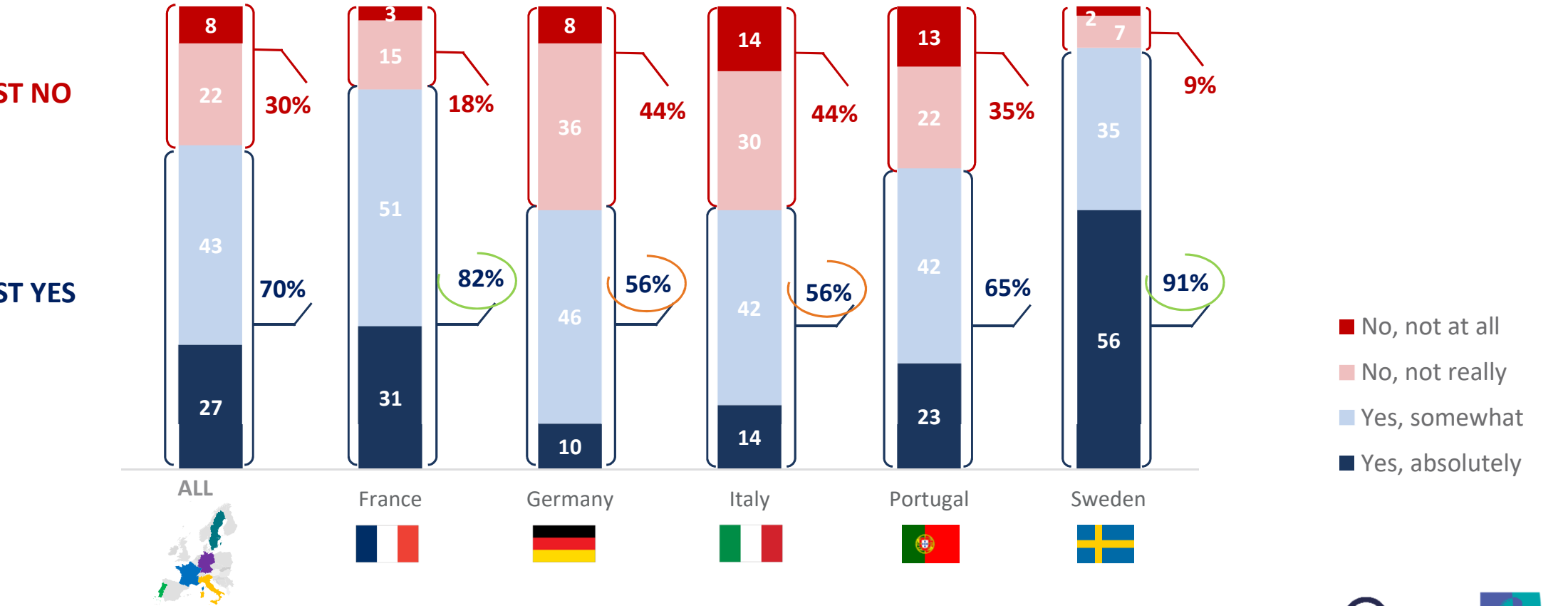
The same perception in the different European countries.



30 Q. Which of the following criteria do you think are most important in evaluating the quality of doctors' work, during and at the end of your treatment?

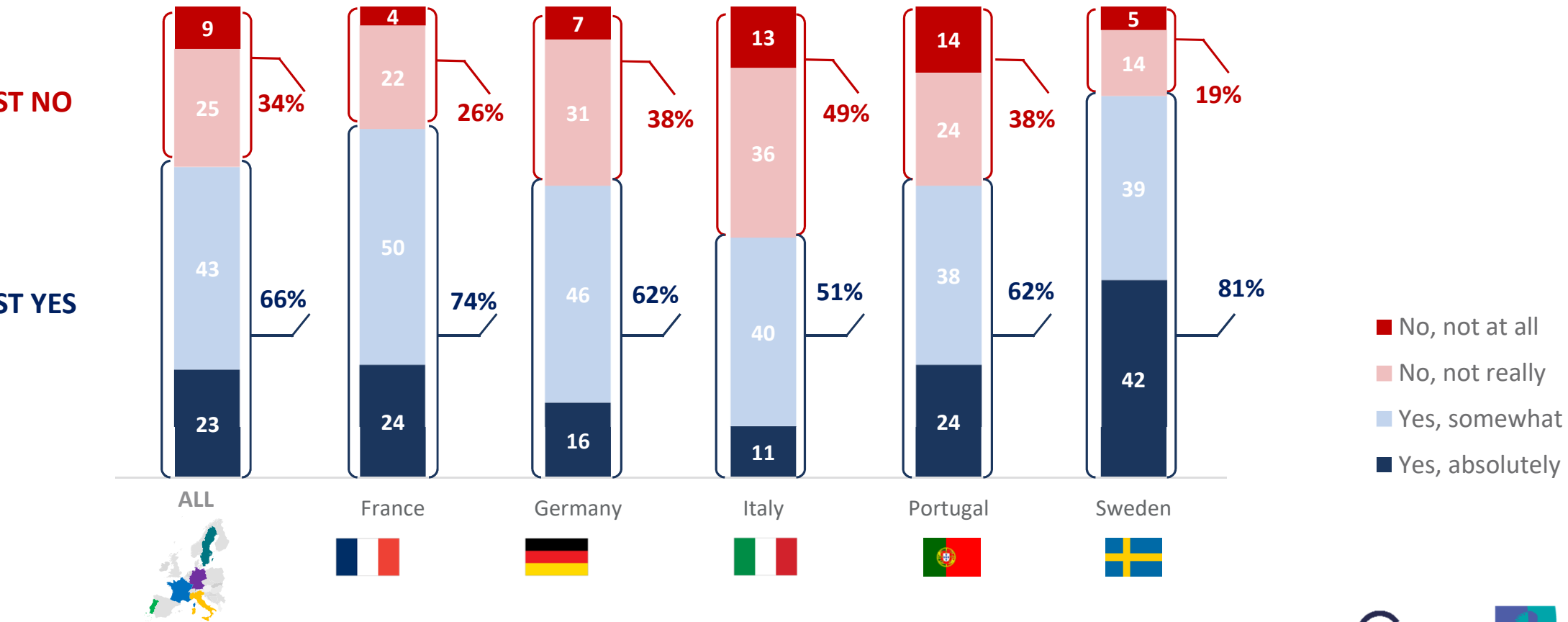
As concerns the change in the role nurses play, not only are a very large majority of Europeans favourable to them being able to prescribe medical analyses, X-rays....

Prescribe medical analyses, X-rays



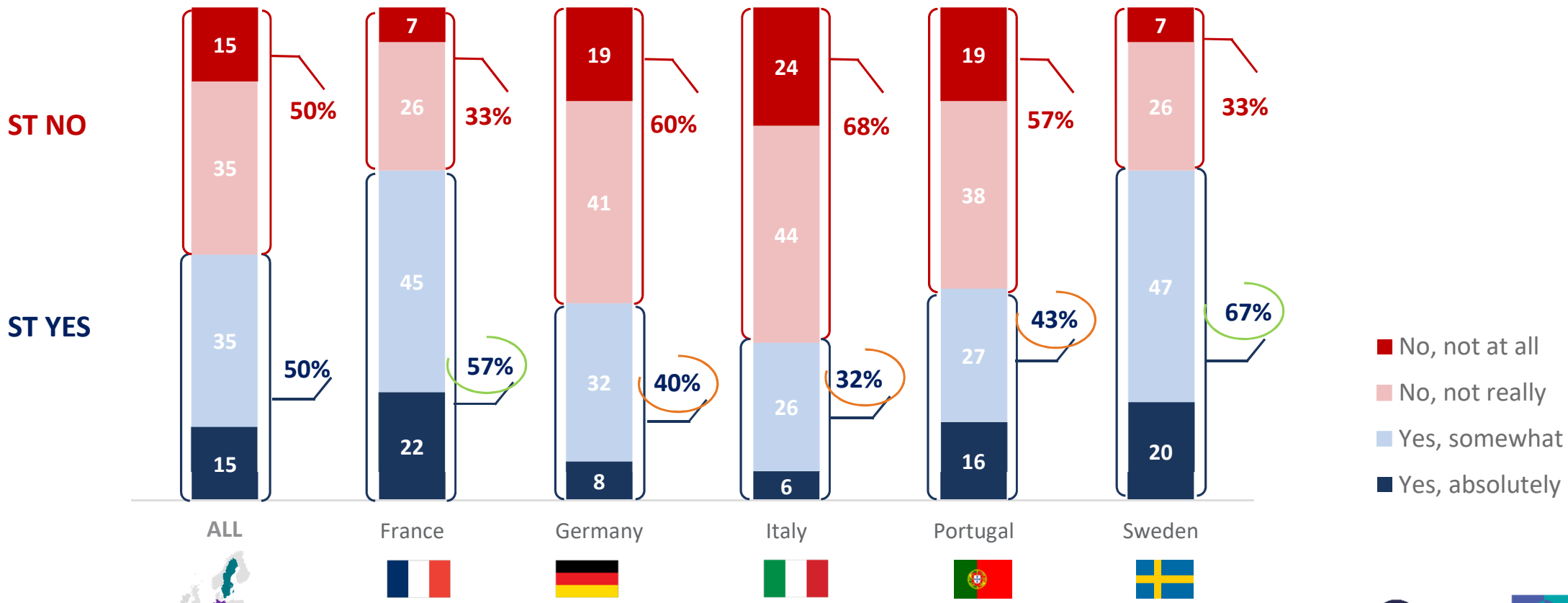
... but also as concerns medical treatments for everyday care: very moderate support in Italy but strong in Sweden, France, Portugal and Germany.

Prescribe medical treatments for everyday care



The level of acceptance of nurses' increased skill levels is even very strong in certain countries such as Sweden and France where a majority of individuals would accept them performing minor surgical operations, but these were a minority in Germany, Italy and Portugal.

Provide treatment involving minor surgical operations



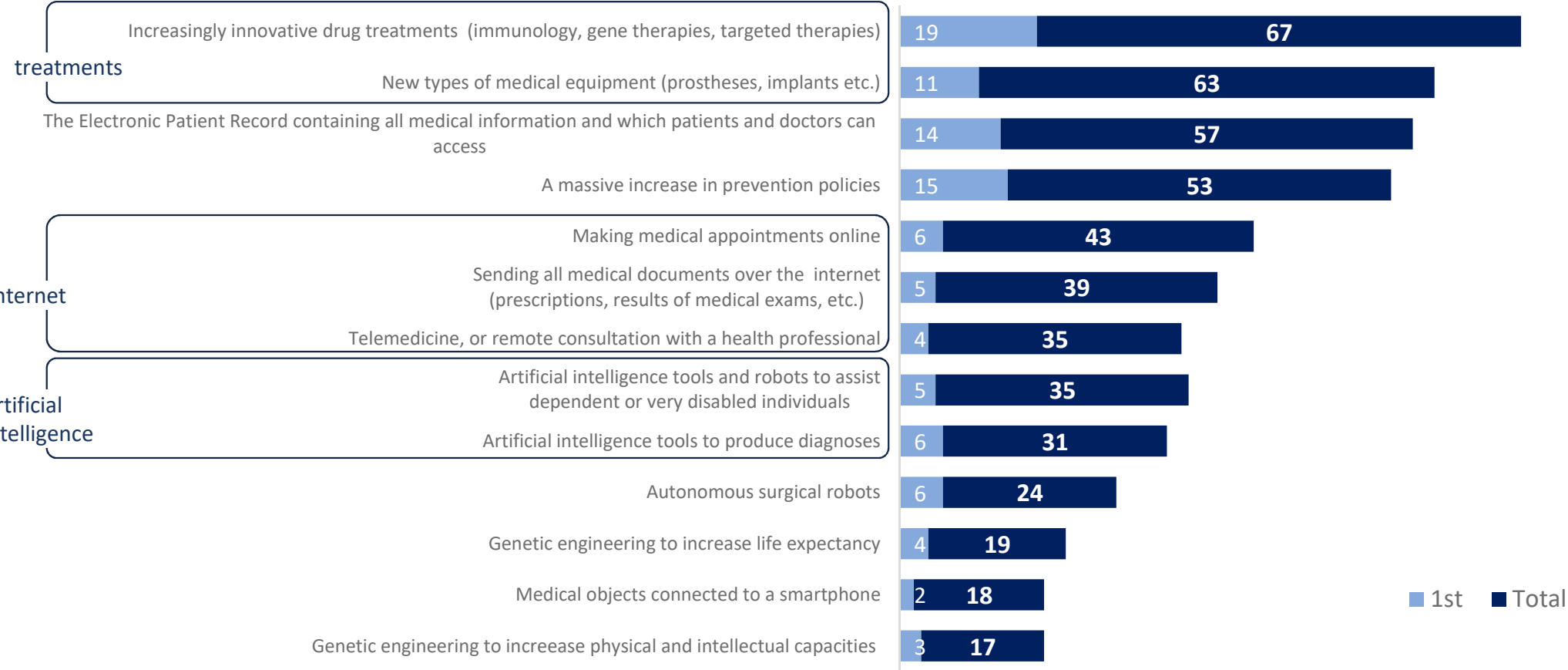
Q. Would you accept a nurse with suitable training being able to perform each of the following acts without the confirmation of a doctor?



A majority feeling: very different revolutions are underway in the health area (revolutionary treatments, information sharing, prevention...)

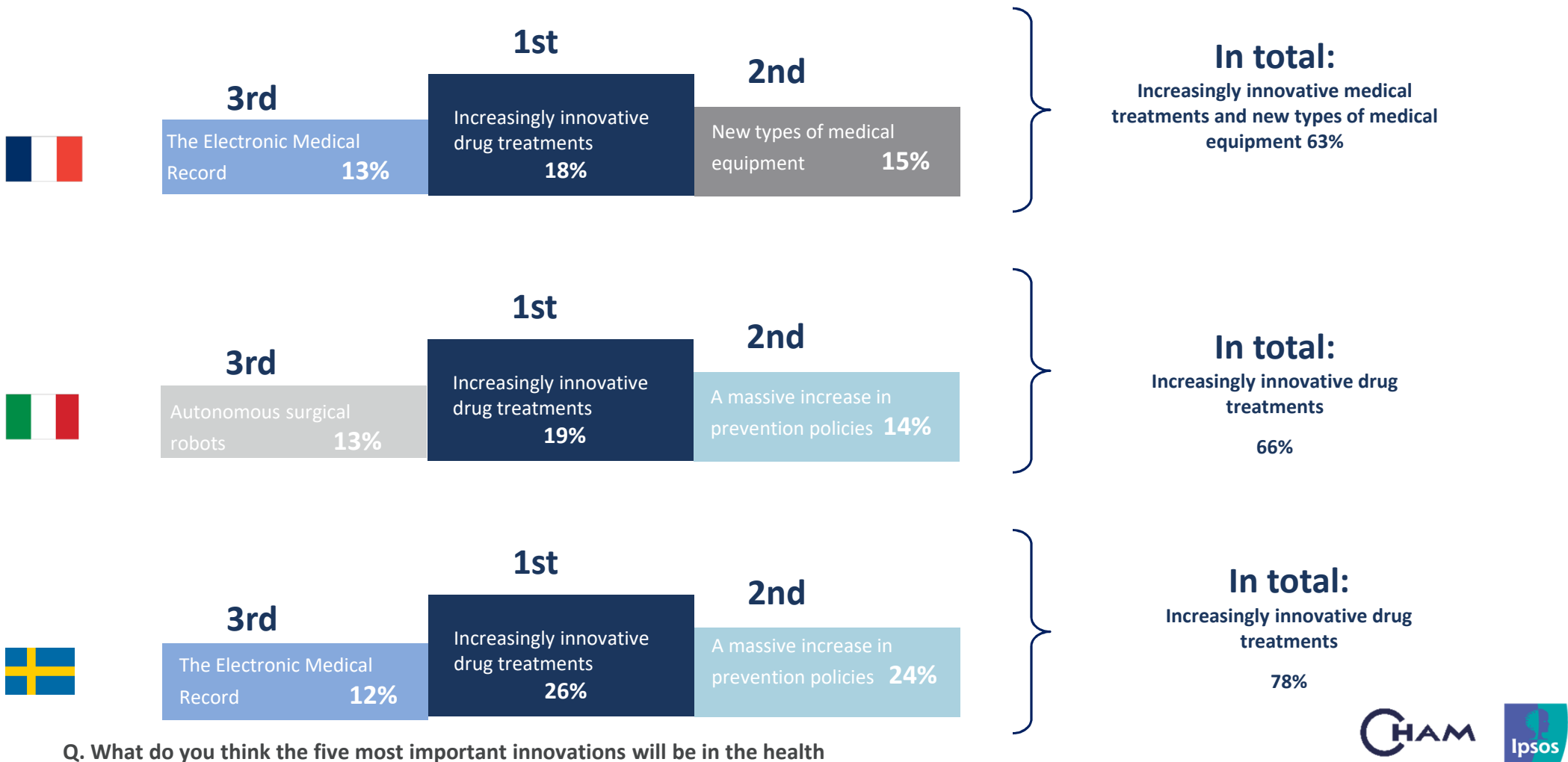
While the subject of innovations in the health field may be complex, many Europeans believe that many such innovations will appear in very different areas, not just in the treatment area but also in the very organisation of their treatment.

Europeans’ perceptions of the different types of innovation show just how much they believe that different revolutions are underway: in terms of treatment and equipment but also information sharing and prevention: AI is still relatively minimised.



Q. What do you think the five most important innovations will be in the health field in the next 10 years?

France, Italy and Sweden are agreed on the fact that the greatest innovation, in the next 10 years, will be the arrival of increasingly innovative drug treatments...



... likewise in Portugal. Germany for its part prioritises the electronic medical record.

