How does global health care stack up?

Public sector

Tracking consumer perceptions from around the world

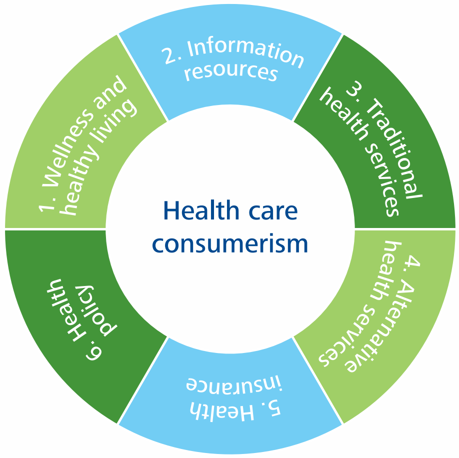
Consumers around the world want a better understanding of their national health care system. To enhance that understanding, global consumers want access to online tools and services that can improve the way they navigate the health system. Universally, they are interested in accessing a secure internet site that allows them to view their own medical records and test results, schedule office visits and order prescription refills. And while they would like help managing a disease diagnosis, they also want to play a larger role in their own health care.

Canadians share these global perspectives, setting the stage for a rise in health 'consumerism' across the country that will affect how the health system delivers and organizes service.

These are just some of the conclusions of the **2010 Deloitte Global Survey of Health Care Consumers**, which was released shortly after the publication of **Deloitte's 2009 Canadian Health Care Consumer Survey**. The global survey provides insights into the behaviours, attitudes and unmet needs of consumers in France, Germany, Switzerland, the United Kingdom, Canada and the United States. Like its Canadian counterpart, the global survey focused on six major areas of health consumer activity:

- Wellness and healthy living
- Information resources
- Traditional health services
- Alternative health services
- Health insurance
- Health policy

Figure 1: Zones of health care consumer activity



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To help round out the results of the Canadian survey, industry stakeholders may be interested in learning about some of the other similarities and differences between Canadian and international consumers. Here are some highlights:

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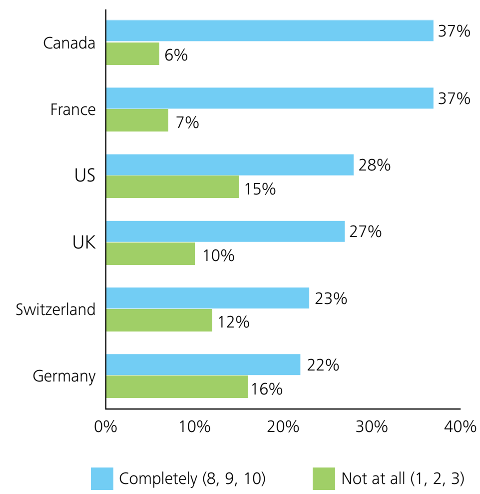
Canadians report a comparatively high level of understanding of the health system

While the majority of consumers have a limited understanding of the health care system in their country, often based on their personal knowledge and family experiences, 37% of Canadian and French adults believe they have a "complete" understanding of the system.

Figure 2: Understanding of health system



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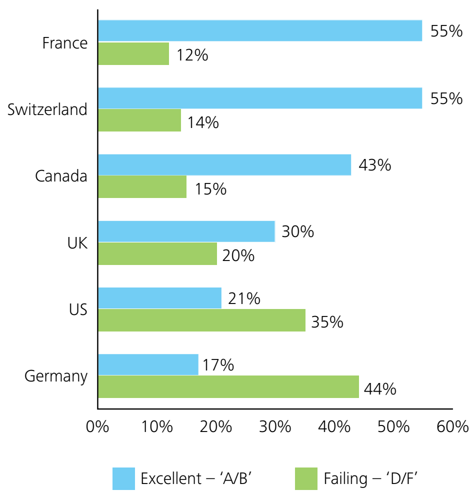
The Canadian health care system receives a relatively high grade

While the French and Swiss grade their systems' performance higher than others, Canada's health care system comes in at a respectable third place. Conversely, 44% of German adults and 35% of American adults give their systems a "failing" grade.

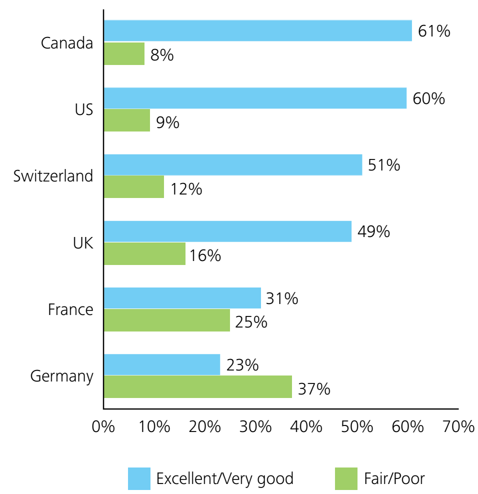
Figure 3: Health care system grade



Canadians have the highest self-reported health status and the lowest incidence of chronic disease

Self-reported health status is highest in Canada and the United States, and lowest in Germany and France. On the flip side, a majority of consumers in Germany, France and the U.S. report having one or more chronic conditions. This compares to 47% of Canadians reporting the same.

Figure 4: Physical health status



The majority of consumers have a limited understanding of the health system in their country; although Canadians report a comparatively higher level.

Canada, the U.S. and the United Kingdom demonstrate a higher level of interest in access to remote monitoring devices and online tools

While consumers in all countries identified a high level of interest in remote or home monitoring devices to help them manage their health, interest is highest in Canada and the U.K. Similarly, Canadian, U.S. and U.K. consumers report the highest interest in accessing online tools that can help them understand their health information, navigate the health system and connect to their health providers. Notably, these three countries also report lower concern over privacy issues associated with personal health records and online tools. The same trends do not hold true in Germany, France or Switzerland.

Canadians use more alternative health services than their global counterparts

While use of alternative health services varies, it is generally low, with consumers unwilling to substitute traditional therapies with alternative methods of care. Canadian (25%) and Swiss (22%) consumers are the highest users of alternative health services, such as acupuncture, naturopathy and chiropractic.

Canadians do not feel adequately insured

Regardless of each system's financing or insurance structure, the majority of global consumers believe they are not adequately insured. Notably, only 25% of Canadians feel adequately insured, compared to 39% of U.S. consumers. At the same time, 51% of Canadians aged 65+ report that they are completely prepared to handle future health care costs. These seemingly contrasting results highlight the extent to which consumers lack a complete understanding of the health care system, their role in health management and the future health costs they may bear.

Regardless of country, consumers today want to play a larger role in managing their own health care. They want more robust access to education, information and treatment options.

Implications for health care industry stakeholders

Given the divergent international systems, it comes as no surprise that consumers' opinions about their health care systems vary widely. Yet, one trend seems to cross international boundaries: the rising move towards consumerism. Regardless of country, consumers today want to play a larger role in managing their own health care. They want more robust access to education, information and treatment options.

These findings suggest significant opportunity for innovation across all borders – and in Canada – to leverage health sector relationships with government leaders and build on the public's trust and positive support of its system. The study identified three areas in particular that should receive the attention of political leaders, government and health sector stakeholders:

1. **Consumer awareness and understanding**
   Useful report cards that measure system performance must be developed and made accessible to providers and consumers. Governments and regional bodies should align financial incentives with optimal performance, an effort that requires investments in information systems, operational procedures and oversight.

2. **Self-care support and health coaching**
   Chronic illnesses are prevalent in all six countries, and across Canada's provinces. The majority of consumers say they need help in managing their diagnosis, but use of information technologies to deliver coaching and self-care support to consumers is lacking. Capitalizing these efforts will be a key priority.

3. **Leadership and vision**
   Political priorities often challenge investments in health care system transformation. However, the rate of system spending growth poses a fiscal challenge to these countries. A concerted campaign to transition from patient passivity to active engagement of consumers will require political and health system leadership and vision.

For more information, view the full results of the
Deloitte 2010 Global Survey of Health Care Consumers

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