



International Alliance of
Patients' Organizations

A global voice for patients



A Survey of Patient Organizations' Concerns

PERCEPTIONS OF HEALTHCARE

SUMMER 2006

CONDUCTED BY

CONSENSUS RESEARCH GROUP INC.
New York • Philadelphia • Los Angeles • Düsseldorf

SUPPORTED BY



INTRODUCTION

The following report summarises the findings of a survey of perceptions on key healthcare policy issues among patients' organization members in Europe, Canada and Nigeria. The study was commissioned by the International Alliance of Patients' Organizations (IAPO), a global alliance representing 365 million patients across all disease areas around the world. It was conducted by Consensus Research Group and supported by Pfizer Inc.

The report was commissioned in order to provide an objective insight into patients' organization members' perceptions on the state of healthcare, future concerns, and reactions to government healthcare policies.

This perception study includes measurement and analysis of the quality of healthcare, the outlook for improvement

and tries to identify the major challenges to achieving these improvements. It also reveals the key role that patients' organizations play in providing information to patients.

The study provides evidence of strongly shared views among members of patients' organizations on needs and concerns related to currently administered healthcare, and signals a need for a shift to a more patient-centred approach.

A patient-centred approach aims to better align national healthcare systems with the needs and expectations of patients, notably by improving their access to treatment and information, ensuring participation in healthcare decision-making and involvement in policy-making.

SURVEY METHODOLOGY

The study was undertaken by Consensus Research Group in April and May 2006 among 1200 members of patients' organizations in 12 countries* and supported by Pfizer (www.pfizer.com)

Random sampling of publicly available lists of patients' organization members, followed by random digit dialling, was employed in each country to generate a representative

cross-section of persons, age 18 years and older, qualified on the basis of membership in a patient organization primarily focused on providing educational materials and other information, or influencing public policy.

*Austria, Belgium, Czech Republic, France, Germany, Hungary, Italy, Spain, Sweden, UK, Canada, Nigeria.

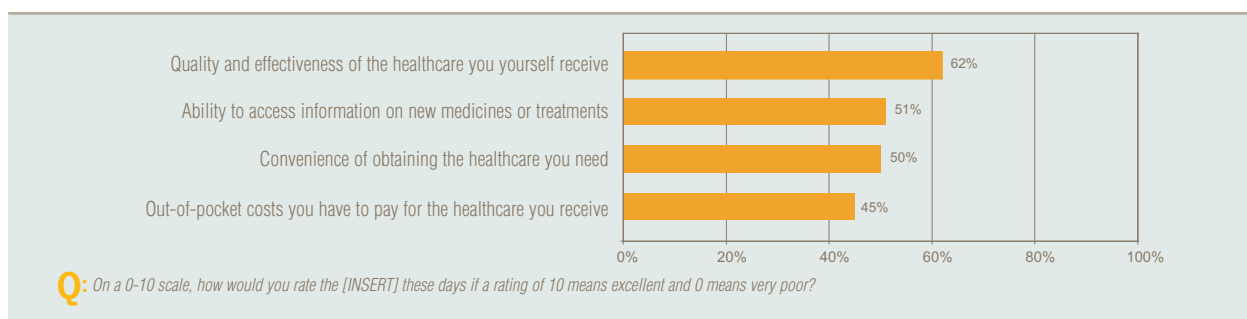
RESULTS AND KEY FINDINGS

The survey gathered a great deal of data on a range of patient healthcare perspectives, some of the key findings are highlighted in the text and graphs below.

SATISFACTION WITH HEALTHCARE

In terms of members of patients' organizations' perceptions of healthcare today, the study shows that they are, in general, more satisfied with the overall "quality" of healthcare today, than with the "delivery" of that healthcare in terms of specifics like:

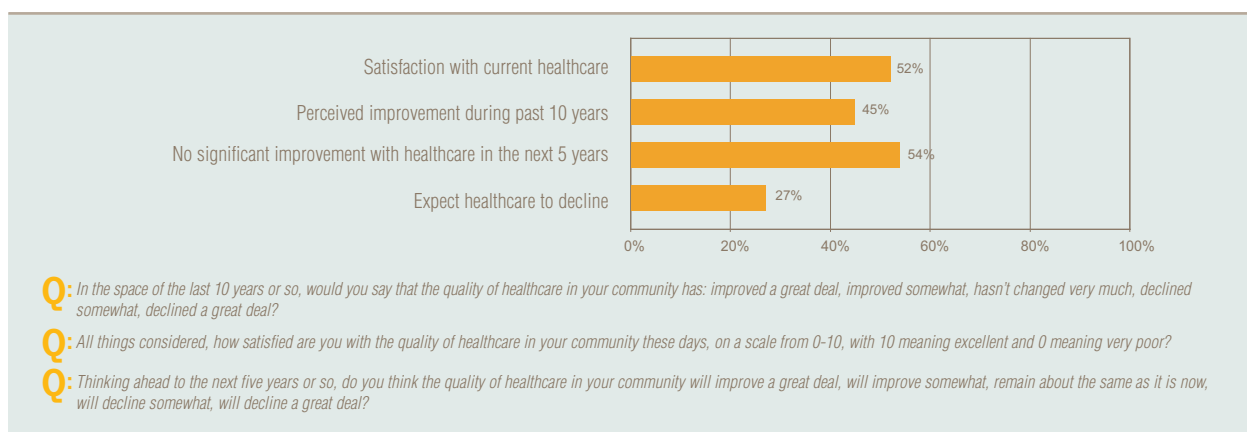
- access to information on new medicines and treatments
- convenience/timing of obtaining the healthcare/appointments/procedures they need
- "out-of-pocket costs" they have to pay for their healthcare.



TRENDS IN HEALTHCARE QUALITY

As far as perceptions of healthcare today as compared with a vision for the future, only 52% of patients' organization members are relatively satisfied with the quality of healthcare in their communities today.

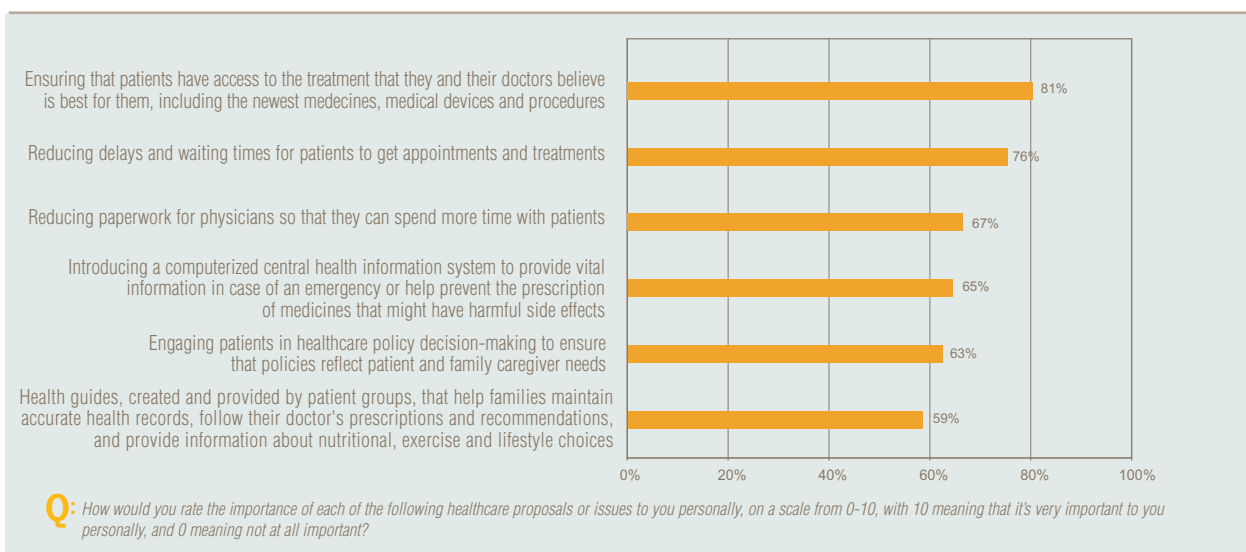
While 45% perceive that the situation has improved during the past 10 years, 54% expect no significant improvement during the next 5 years, including 27% who expect the quality of healthcare to decline.



IMPORTANCE RATINGS

The survey shows that members of patients' organizations assign top priority to the following areas for the reform of healthcare systems:

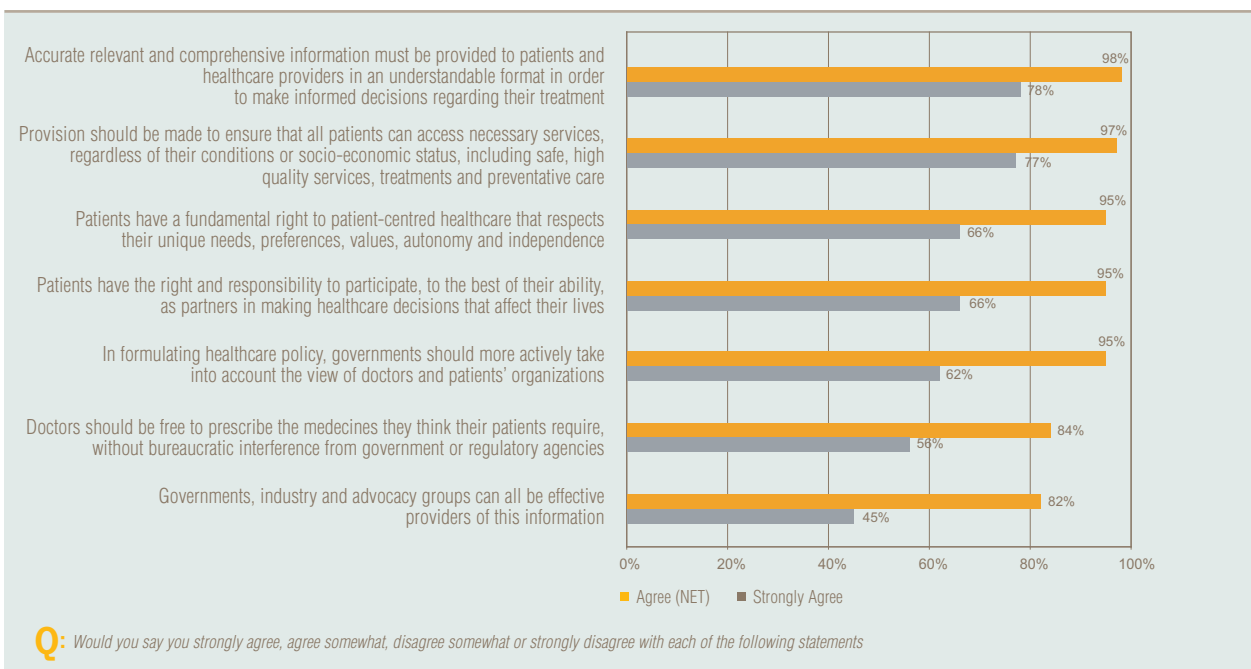
- access to the treatment they and their doctors believe is best for them
- reducing delays and waiting times for appointments and treatments
- reducing paperwork so that doctors can spend more time with patients.



AGREEMENT OF HEALTHCARE POSITIONS

Where key healthcare issues are concerned, members of patients' organizations express their strongest agreement with the need for improving healthcare systems through:

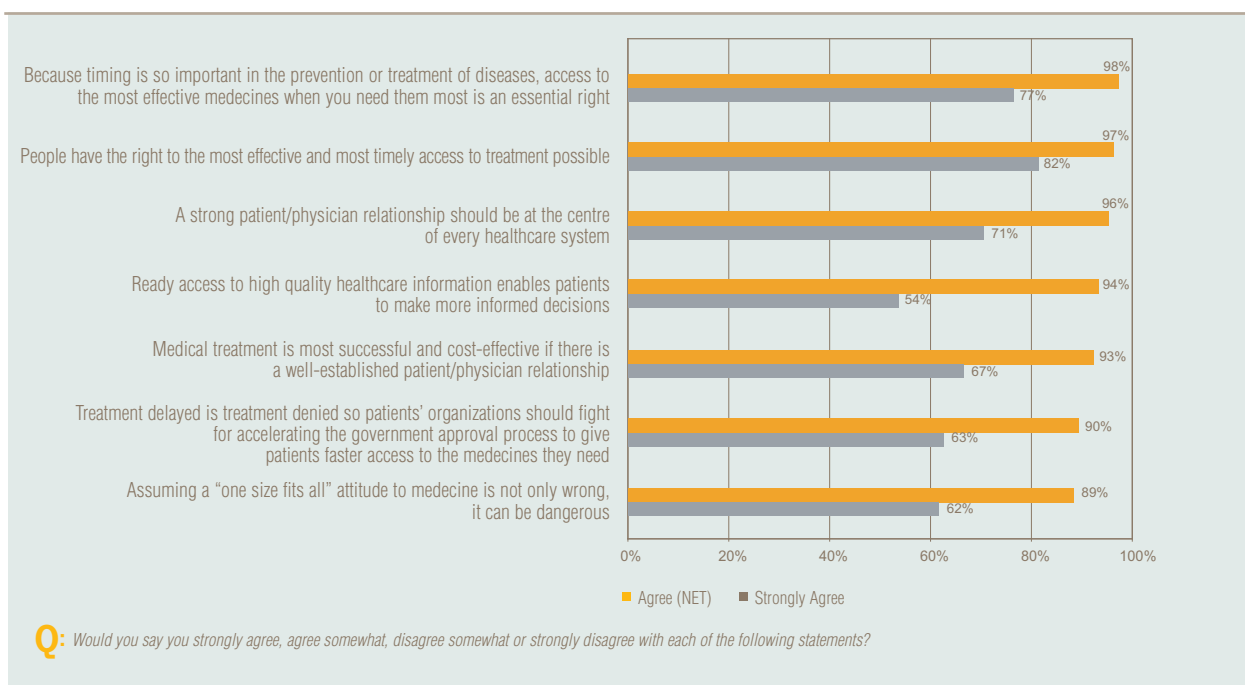
- accurate, relevant and comprehensive information for patients and their caregivers, to help them make informed decisions about treatment
- ensuring access to necessary services, treatments and preventive care
- patient-centred healthcare policies that respect their unique needs, values and independence.



AGREEMENT OF HEALTHCARE STATEMENTS

The healthcare position statements which patients' organization members most agree upon include:

- people have the right to the most effective and most timely access to treatment possible
- because timing is so important in the prevention of disease, access to the most effective medicines when you need them most is an essential right
- a strong patient/physician relationship should be at the centre of every healthcare system.

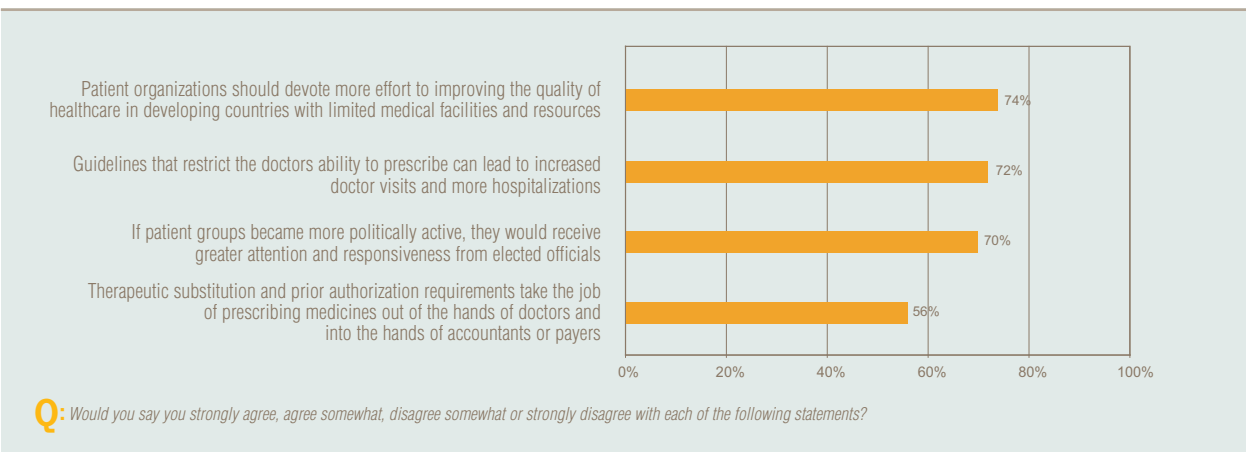


REACTIONS TO COST-CONTAINMENT STRATEGIES

The survey showed that more than three quarters (77%) of members of patients' organizations polled oppose government cost-containment strategies which reimburse only for the least expensive medicine, even if that medicine is not the most effective or appropriate therapy for an individual.

Comparable numbers (73%) agree that government healthcare agencies and review committees which focus on cost-containment result in delays and denial of access to new medicines that doctors recommend and patients need.

And 72% of patients' organization members feel that guidelines restricting the doctors' ability to prescribe can lead to increased doctor visits and more hospitalisations.

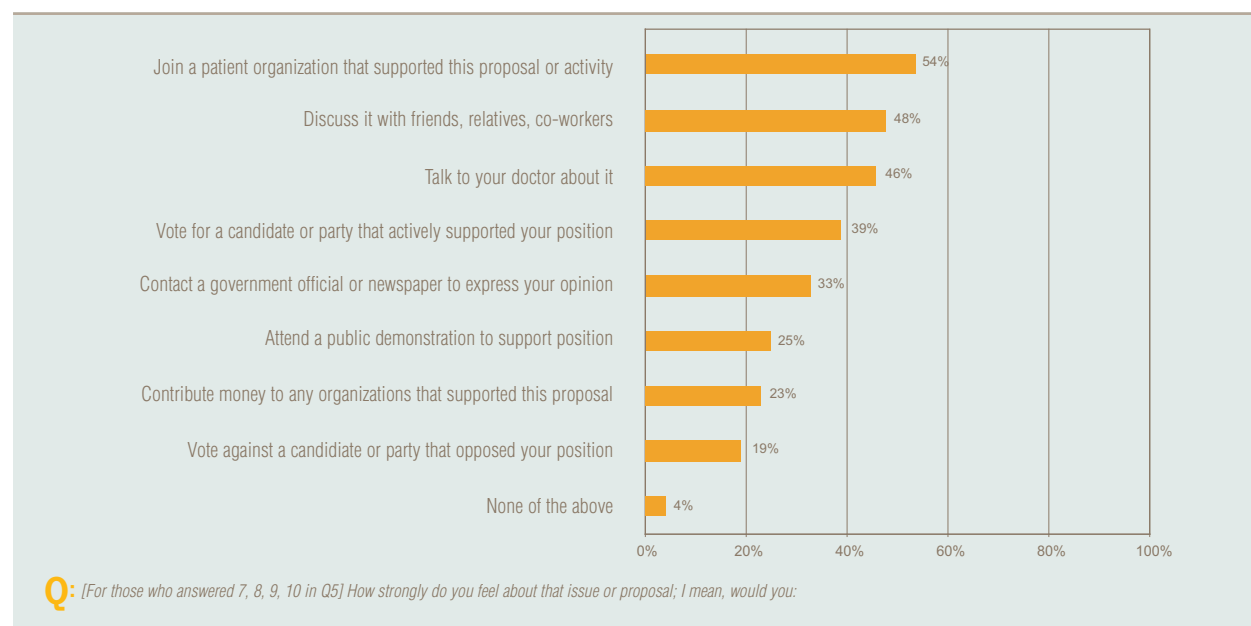


INCLINATION TO TAKE ACTION

Healthcare came out as a decisive policy area for swing-voters, with 39% of patients' organization members stating they would vote for a political candidate or party that actively supported their positions on healthcare issues.

Of the voters who base their support for candidates or parties on healthcare issues, when asked which specific healthcare issues they assign top priority to, they cited the following:

- ensuring that patients have access to the treatment that they and their doctors believe is best for them, including the newest medicines, medical devices and procedures
- reducing delays and waiting times for appointments / treatments
- reducing paperwork so that physicians can spend more time with patients.



CONCLUSIONS

The findings of this survey attest to many shared concerns and beliefs from a wide range of organizations and countries that current healthcare systems need to adopt a more patient-centred approach which seeks to better align national systems with the needs and expectations of patients. In line with these shared views, the findings illustrate a need for increased involvement of patients as partners and legitimate stakeholders in shaping healthcare policy decisions that directly affect their lives.

A significant trend that can be seen from the results of this survey is the progressively changing role and perception of patients' organization members from information providers to advocates that actively influence healthcare policies around the world. The key findings in this summary report should inspire action with government, healthcare decision makers and physician organizations towards ensuring patient representatives are engaged in policy decisions.

Some of the main implications of this report include:

- Patients require unrestricted access to healthcare information from any source in order to make informed decisions about appropriate treatments
- To improve the quality of healthcare, physicians need to be relieved of bureaucratic procedures to allow the best treatment for each individual
- The accessibility of individualized treatment and healthcare information may be determining factors for improved social welfare and societal stability
- Optimal healthcare requires spending more, and more effectively, on health and wellness in general, and on prevention, early diagnosis and timely disease management in particular.

Future healthcare policies should increasingly focus on how to utilize resources more efficiently and improve patient outcomes with lower costs. The key to achieving these goals rests in public-private partnerships designed to meet the needs of local healthcare systems as well as continuously emphasizing patient-centred treatment approaches that include information, medical innovation, wellness programmes, preventive care and patient responsibility.

