IDIS REPORT

SPANISH PRIVATE HEALTHCARE SECTOR BAROMETER

2014

Instituto para el Desarrollo e Integración de la Sanidad

Instituto para el Desarrollo
e Integración de la Sanidad

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Here we present the latest edition of the Spanish Private Healthcare Sector Barometer, a study which has become a point of reference within the sector and which gives our patients and their families a way to assess private healthcare service quality and identify areas for improvement.

This year, once again, the conclusions of this study highlight the excellent state of the healthcare provided. I would like to point out two findings from the report which support this claim: firstly, average satisfaction has scored 7.5 on a scale of 1 to 10, and secondly, 87% of respondents would recommend private healthcare to family and friends. Above all, patients gave the best ratings to flexibility of care, treatment, professionalism, trustworthiness and reassurance conveyed by healthcare personnel and the wide range of services provided.

It also bears mentioning that in the three editions of this study the ratings, both generally and for the majority of the indicators, have been very favourable. This fact, which lends considerable consistency, reliability and credibility to the results, stems from the outstanding work being done by the different professionals in private healthcare. I would like to recognise the efforts and dedication they put in day in and day out.

At IDIS, we understand that patients and their families are at the centre of our activities and that we take care of one of the most important assets for people: their health. For this very reason we have a firm commitment to promoting quality in healthcare, both private and public. To this end, we are working to support healthcare sector operators in the search for excellence, making it a hallmark of our environment. We believe that this is the best way not only to ensure the development and integration of healthcare as a whole, but also to help improve quality of life in Spain. In this way we hope to foster an exchange of experiences amongst IDIS members, as well as to learn from the achievements and advances made by other sectors that are committed to quality.

We also consider it essential to make progress in certifying the quality of care, because this allows for an objective and independent view of our private healthcare system, which can also be used to compare against other national and international standards. As such, we have launched an ambitious project aimed at highlighting and promoting the quality of healthcare centres through an accreditation system that assesses and categorises the certifications earned by each centre, area or department. At IDIS, we are confident that this initiative will be an excellent way to encourage each healthcare operator dedicated to continuously improving quality in healthcare and providing users with the best human and technological resources, all of which will benefit our patients and their families.

Let me conclude by congratulating all of the operators involved in private healthcare for the excellent results they have achieved. We encourage them to continue on this path towards quality, which invariably involves us all.

Javier Murillo
President of Instituto para el Desarrollo e Integración de la Sanidad

2014

INTRODUCTION AND METHODOLOGY

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The 2014 Spanish Private Healthcare Sector Barometer was conducted by Kantar Health.

Universe: Spanish residents of both sexes, 18 years and older, with private health insurance, whether general medical insurance, a reimbursement policy, or civil service mutual scheme.

Sample size: non-proportional allocation. In all, 2,528 interviews were conducted, with the following geographic distribution:

Regions	No. of interviews
Andalusia	251
Aragon	152
Asturias	104
Balearic Islands	95
Canary Islands	97
Cantabria	94
Castilla y León	153
Castilla-La Mancha	120
Catalonia	250
Madrid	252
Valencia	200
Extremadura	88
Galicia	195
Navarra	95
La Rioja	95
Murcia	95
Basque Country	192
TOTAL	2,528

2,528 INTERVIEWS WITH PRIVATE HEALTH INSURANCE POLICYHOLDERS

- **Weighting:** based on the number of policyholders by autonomous region and by age (according to population), in order to ensure a nationally representative sample.
- **Sampling error:** The entire sample is nationally representative, with a sampling error of ± 1.98% for a confidence level of 95.5%. In the case of maximum uncertainty, P=Q.
- **Fieldwork:** From January to February 2014.
- **Methodology:** The information was collected using Computer Assisted Web Interviews (CAWI) amongst private healthcare policyholders in Kantar's online panel.
- **Questionnaire:** structured and primarily closed-ended, with two different rating scales, a Likert-type scale from 1 to 5 and the other from 1 to 10, where the highest score is always the most positive.

2014

RESULTS OF THE SPANISH PRIVATE HEALTHCARE SECTOR BAROMETER 2014

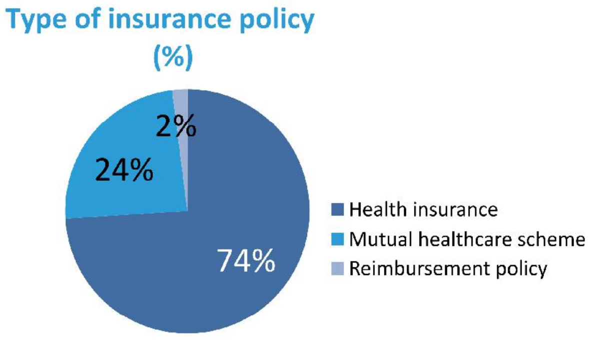
3.1. Private health insurance: arrangement, length of use and services used

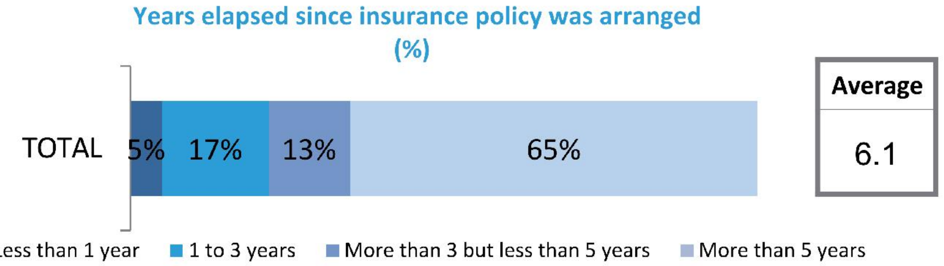
74% of policyholders have health/general medical insurance, which is the most common type of insurance taken out. 24% of policyholders have a civil service mutual scheme where residual costs are reimbursed.

In terms of length of use, 65% of respondents have had a private health insurance policy for more than 5 years, with the average being roughly 6 years (Figure 1).

ON AVERAGE, POLICYHOLDERS HAVE HAD A PRIVATE HEALTH POLICY FOR 6.1 YEARS

Figure 1 Type of insurance policy and years elapsed since it was arranged





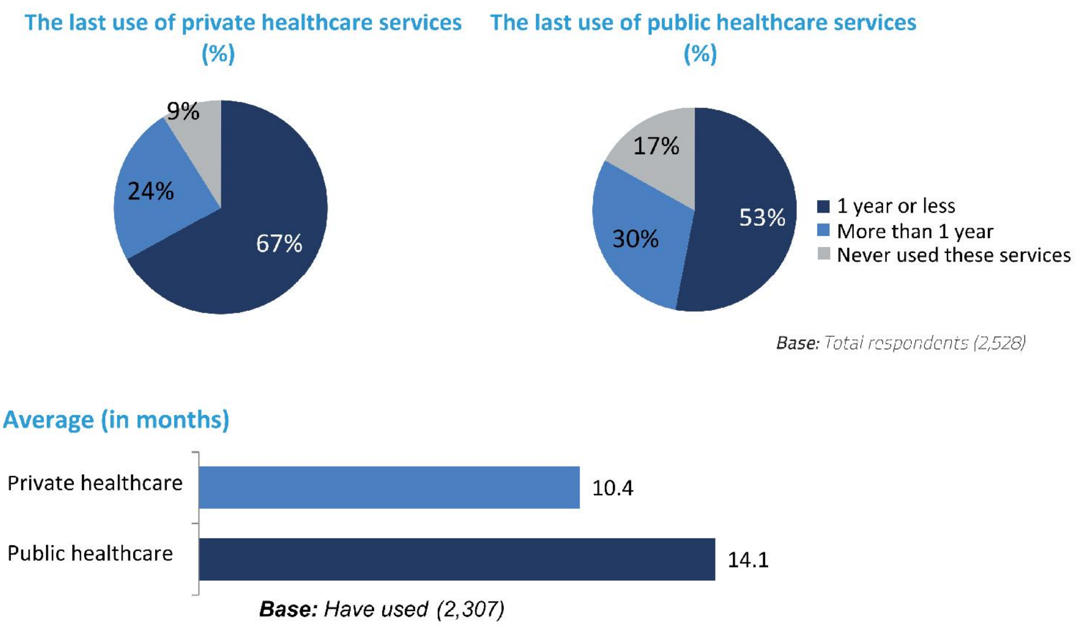
Base: Total respondents (2,528)

Which of the following private healthcare policies have you arranged for yourself or a family member?
How long has the policy been in force?

The average frequency at which private healthcare services are used is greater than that for public services: slightly more than 10 months since the last time they used private healthcare compared to 14 months since the last time they used public healthcare (Figure 2A).

91% OF RESPONDENTS HAD USED PRIVATE HEALTHCARE AT LEAST ONCE

Figure 2A The last use of private/public healthcare services



Base: Have used (2,307)

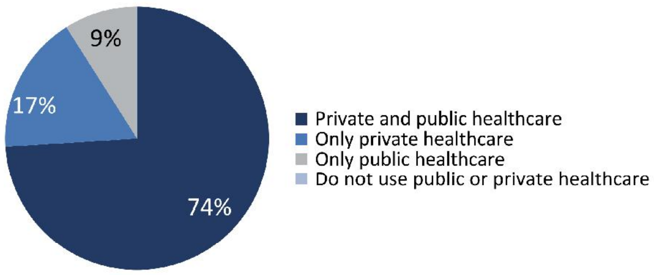
When was the last time you used private healthcare services?
When was the last time you used public healthcare services?

7 out of 10 respondents use both public and private healthcare; the use of both healthcare systems is the most common practice. It is also worth mentioning that almost a fifth of respondents use only private healthcare, which is a significant increase compared to the previous year. (Figure 2B).

74% OF POLICYHOLDERS ARE FAMILIAR WITH THE PUBLIC HEALTHCARE SYSTEM BECAUSE THEY USE BOTH SYSTEMS

17% OF POLICYHOLDERS USE ONLY PRIVATE HEALTHCARE

Figure 2B Degree to which respondents use private and public healthcare (%)



Base: *Total respondents (2,528)*

Merged data from Figure 2A
When was the last time you used private healthcare services?
When was the last time you used public healthcare services?

Specialist consultation is the service that policyholders use most often. 92% of private healthcare users visited a specialist at least once, and 7 out of 10 did so in the past 12 months at an average frequency of 4 visits a year.

Diagnostic tests come second in frequency of use amongst respondents. Therefore, 80% of policyholders used this service at least once, and 6 out of 10 used it in the past year at an average frequency of 3 visits a year.

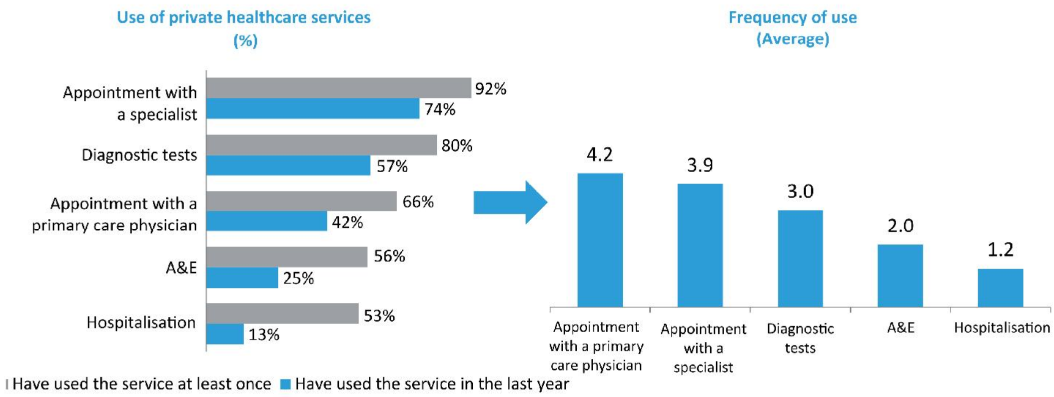
There were no major differences in the number of private healthcare policyholders who used primary care and A&E services (66% vs. 56%). However, 42% of policyholders visited their primary care doctor in the past year, whereas only 1 out of 4 policyholders needed to visit the A&E in the past 12 months.

Lastly, 1 out of every 2 policyholders required hospitalisation at least once, although only 13% were hospitalised in the past year. (Figure 3).

SPECIALIST CONSULTATIONS AND DIAGNOSTIC TESTS WERE THE SERVICES USED MOST OFTEN

ONE OUT OF EVERY TWO POLICYHOLDERS WAS HOSPITALISED AT LEAST ONCE

Figure 3 Degree and frequency with which private healthcare services are used



Base: *Have used private healthcare services at some point (2,307)*

Base: *Have used the service in the last year*

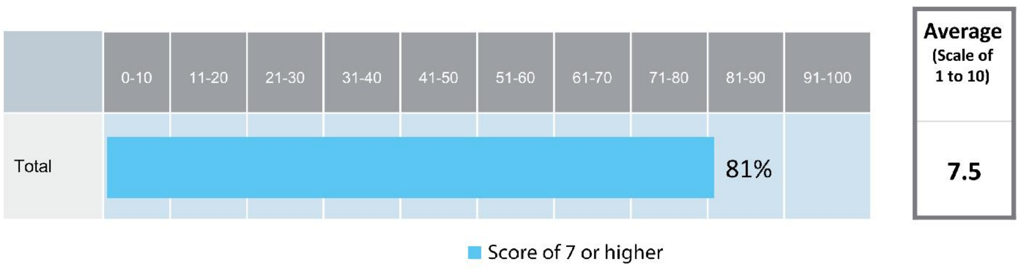
Which of the following private healthcare services have you used at least once?
Which of the following private healthcare services have you used in the last year?
How many times have you used these services in the last year?

3.2. Opinion of private healthcare services

According to the respondents, there is a high degree of satisfaction with private healthcare services in Spain. The average score was 7.5, on a scale of 1 to 10, with 81% of respondents giving an average score of 7 or higher. This rating underscores the excellent level of care provided and the firm commitment to focusing all efforts on patient well-being and improving the patient's quality of life. (Figure 4).

81% OF USERS RATE PRIVATE HEALTHCARE SERVICES AS VERY GOOD TO EXCELLENT

Figure 4 Satisfaction with private healthcare services



Base: *Total respondents (2,528)*

How satisfied are you with private healthcare services in Spain?

The degree of satisfaction with the services provided by public healthcare receives a score of 6.4. 54% rate it above 7 points on a scale of 1 to 10. (Figure 5).

Figure 5 Degree of satisfaction with public healthcare services

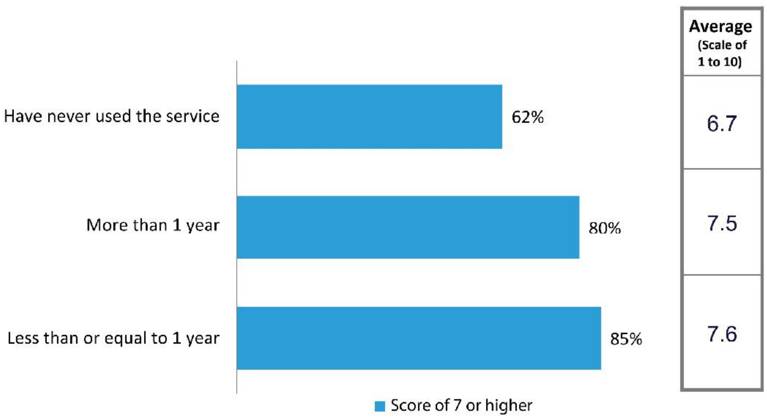
Base: Total respondents (2,528)

How satisfied are you with public healthcare services in Spain?

Note that the rating for private healthcare is directly related to the amount of time that has passed since last using its services. In this regard, those who have never used private healthcare give it an average score of 6.7 points, whereas those who have used it in the past year give it an average score of 7.6 points (Figure 6).

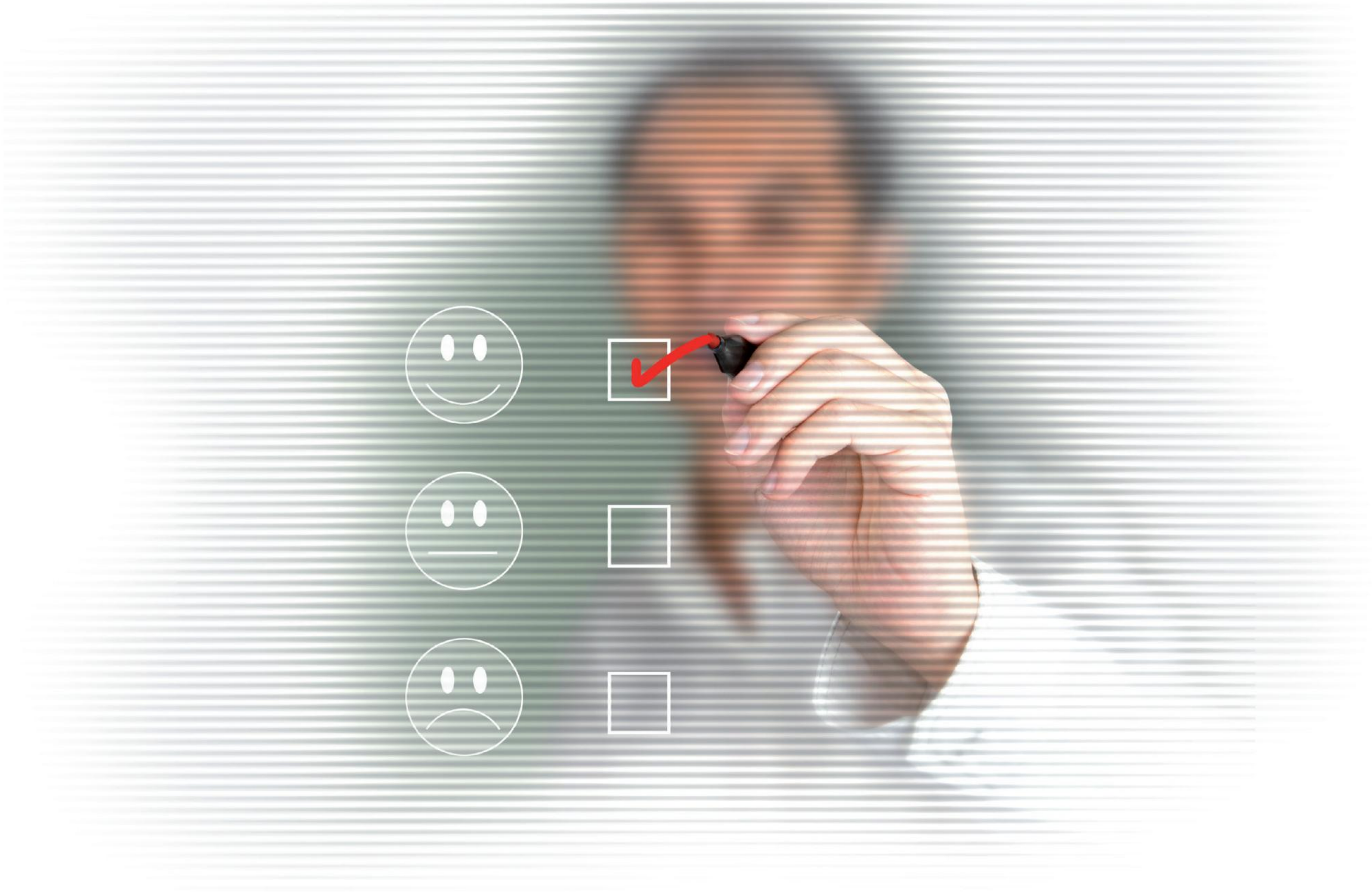
POLICYHOLDERS WHO HAVE USED PRIVATE HEALTHCARE SERVICES IN THE PAST YEAR GIVE IT A HIGHER RATING

Figure 6 Degree of satisfaction as a function of usage of private healthcare (%)



Base: Total respondents (2,528)

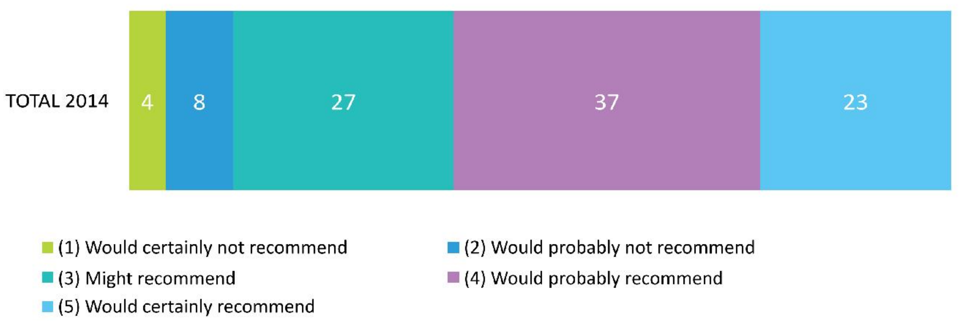
When was the last time you used private healthcare services?
How satisfied are you with private healthcare services in Spain?



The high degree of satisfaction with the services provided by private healthcare is highlighted by the fact that 87% of respondents would recommend it to family and friends (Figure 7).

87% OF POLICYHOLDERS WOULD RECOMMEND USING PRIVATE HEALTHCARE

Figure 7 Likelihood of recommending private healthcare



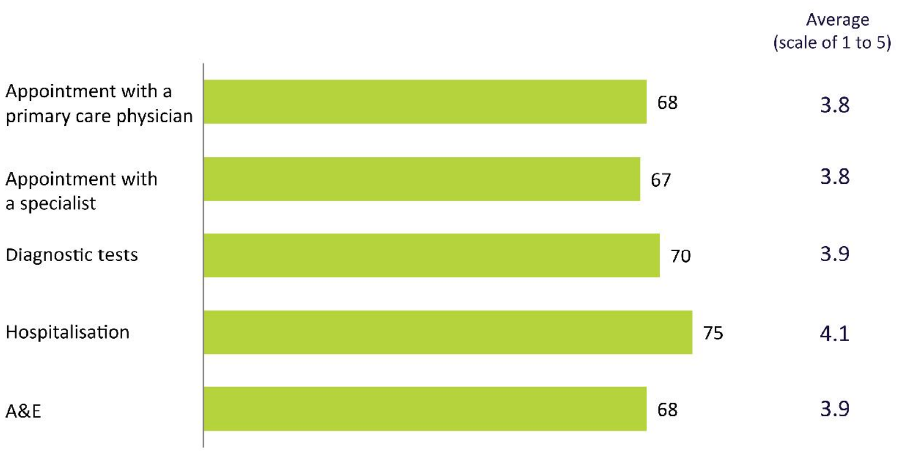
***Base:** Total respondents (2,528)*

How likely are you to recommend private healthcare services to a friend or relative?

7 out of 10 users have used one or more private healthcare services and indicate that they are likely to recommend them, with a score of 4 (on a scale of 1 to 5) (Figure 8).

7 OUT OF 10 USERS OF THE VARIOUS PRIVATE HEALTHCARE SERVICES WOULD RECOMMEND ALL OF THEM

Figure 8 Degree to which private healthcare services are recommended



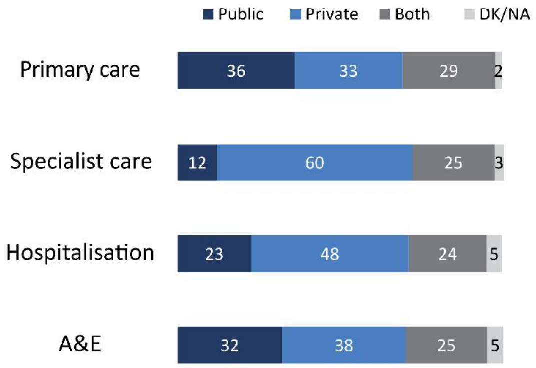
Base: *Have used various services (2,307)*

Which of the following private healthcare services have you used in the last year? How likely are you to recommend private healthcare services to a friend or relative?

Respondents use private healthcare in particular when they require specialist care or hospitalisation (Figure 9).

SPECIALIST CARE AND HOSPITALISATION ARE THE MAIN REASONS FOR CHOOSING PRIVATE HEALTHCARE

Figure 9 Usage of private and public healthcare by healthcare service



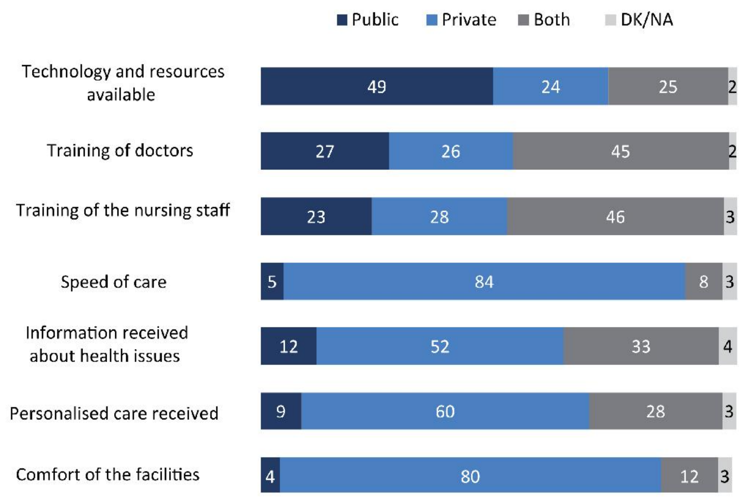
Base: Total respondents (2,528)

If you or a member of your household needed to use a healthcare service and were free to choose, would you go to a public or private centre for...?

Choosing a private centre is determined by the speed of care the information and personalised care received and the comfort of the facilities. The training of the nursing staff is also taken into account (Figure 10).

SPEED OF CARE IS A DETERMINING FACTOR WHEN CHOOSING PRIVATE HEALTHCARE

Figure 10 Usage of private and public healthcare by reason



Base: *Total respondents (2,528)*

From amongst the following reasons for choosing a private healthcare service, if you were free to choose, would you choose a public or private healthcare service when considering...?

3.2.1. Advantages and disadvantages of private healthcare

Almost all policyholders spontaneously cite the flexibility/speed of private healthcare as its main advantage.

Moreover, the comfort, treatment and care received are other advantages cited spontaneously by a third of respondents (Figure 11).

POLICYHOLDERS HIGHLIGHT HEALTHCARE SERVICES AS MAJOR STRENGTHS OF PRIVATE HEALTHCARE

Figure 11 Advantages of private healthcare (spontaneous responses) (%)

Advantages	TOTAL
SPEED/AGILITY OF PRIVATE HEALTHCARE	**95**
Overall speed of services	44
Short waiting time for appointments	39
COMFORT	**29**
Better/more modern facilities	9
Shorter waiting time for diagnostic tests	8
TREATMENT	**27**
Treatment/care received	18
Personalised attention	8
SPECIALISTS	**24**
Possibility of choosing specialist/hospital	11
OTHER ADVANTAGES	**15**
NO ADVANTAGES	2

Base: *Total respondents (2,528)*

In your opinion, what are the main **advantages** and disadvantages of private healthcare?

As for the disadvantages of private healthcare, 1 out of 2 respondents spontaneously cite the cost of insurance as the main disadvantage. Further down the list, the fact of having fewer resources was indicated by a fifth of respondents.

Note that 9% of respondents could not spontaneously cite any disadvantage of private healthcare (Figure 12).

Figure 12 Disadvantages of private healthcare (spontaneous responses) (%)

Disadvantages	TOTAL
COST	**49**
Payments/price	46
RESOURCES/TECHNOLOGY	**18**
Fewer resources/less advanced technology	18
COVERAGE	**11**
WAITING TIMES	**9**
OTHER DISADVANTAGES	**3**
NO DISADVANTAGES	**9**

Base: Total respondents (2,528)

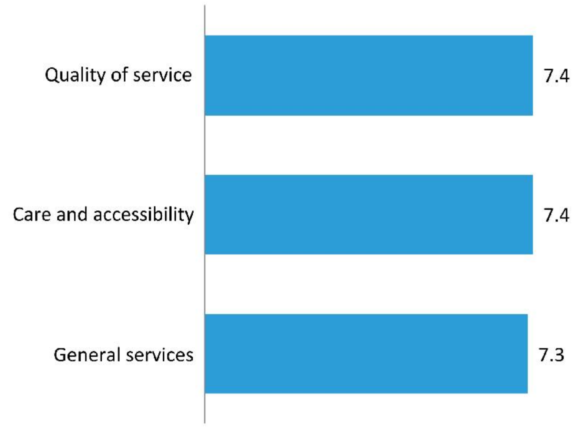
In your opinion, what are the main advantages and **disadvantages** of private healthcare?

3.2.2. Rating of the various services provided by private healthcare

In order to assess the different aspects of private healthcare on as broad a spectrum as possible, the Barometer identifies three main areas: care and accessibility, quality of service and general services.

The rating of "B" given in these 3 areas clearly reflects the excellent image of private healthcare in Spain (Figure 13).

Figure 13 Average rating of the various services provided by private healthcare



Base: *Total respondents (2,528)*

3.2.3. Rating of the care and accessibility of the services provided by private healthcare

The set of aspects related to "care and accessibility" were rated excellent, receiving an average overall score of 7.4 on a scale of 1 to 10.

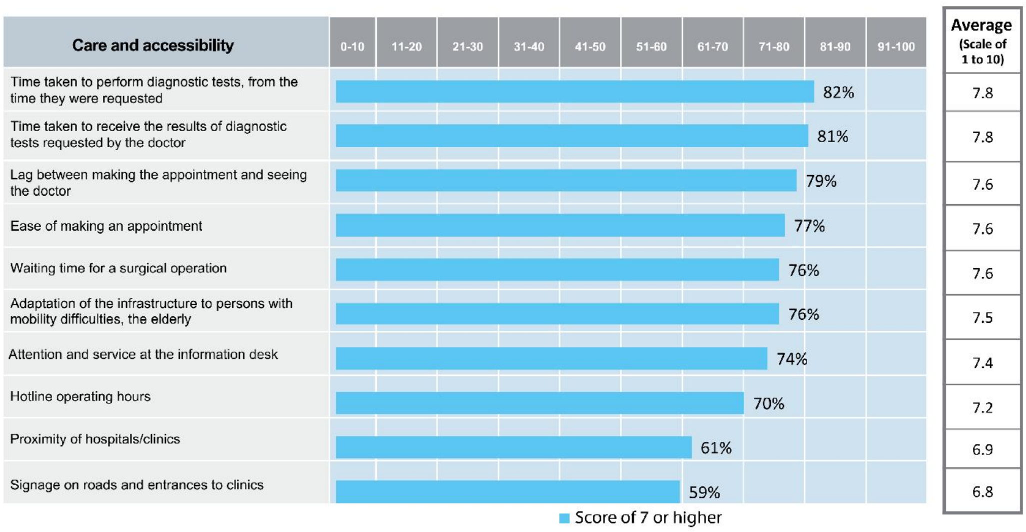
As for the top rated aspects (average ratings of 7.8), respondents indicate waiting time for diagnostic tests and results, highlighting the speed and flexibility of private healthcare.

Respondents also indicate waiting time for surgery, ease of making an appointment, and the time it takes to be seen by the doctor, thus establishing that flexibility and speed are outstanding features of private healthcare.

The only two aspects which rated slightly below 7 were proximity of centres/hospitals and the signposting on roads and entrances to the centre's services, with scores of 6.9 and 6.8, respectively (Figure 14).

THE SPEED AND FLEXIBILITY WITH WHICH TESTS ARE PERFORMED AND THE DELIVERY OF RESULTS ARE THE ASPECTS HIGHLIGHTED MOST OFTEN

Figure 14 Attributes related to "care and accessibility" (%)



Base: Total respondents (2,528)

Based on your personal experience or impression, please rate each of the following statements related to the **care and accessibility** of private healthcare services using a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied.

The flexibility and speed of healthcare are shown to be the key features of private healthcare. The data provided by the respondents in this study reflects the reality of the healthcare system in this aspect (Figure 15).

WAITING TIME IS SIGNIFICANTLY SHORTER IN PRIVATE HEALTHCARE

Figure 15 Average number of days on the waiting list in private and public healthcare

	Private Average no. of days on the waiting list	Public Average no. of days on the waiting list
Time taken to perform a diagnostic test, from the time it was requested.	**8.1**	**47.5**
Time taken to receive the results of a diagnostic test, from the time it was performed.	**5.8**	**18.5**
Time taken to perform a surgery, from the time it was prescribed.	**19.6**	**91.4**

Base: *Have used public and private healthcare (1,880)*

Now please think about the **last time** you had to have any diagnostic test or any surgery done. For each of the following situations, please indicate the average number of days you had to wait, both for public and private healthcare.

3.2.4. Rating of private healthcare quality of service

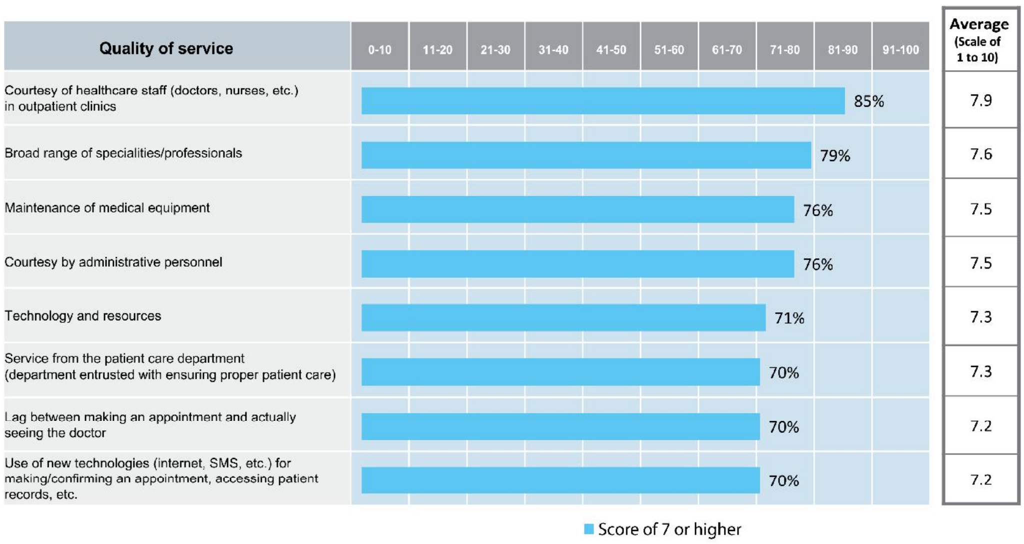
As with "care and accessibility", the aspects related to "quality of service" have an average score of 7.4. All aspects included in this set have scores of 7.2 and higher, and this clearly highlights the high degree of policyholders' satisfaction with the service provided by private healthcare.

In this regard, the treatment given by healthcare personnel, together with the wide range of specialties/professionals, were the aspects that were highlighted the most often, with scores of 7.9 and 7.6, respectively. (Figure 16)

THE TREATMENT GIVEN BY HEALTHCARE PERSONNEL AT OUTPATIENT CLINICS RECEIVED THE HIGHEST RATING

THE WIDE RANGE OF SPECIALTIES/PROFESSIONALS HAS A VERY FAVOURABLE RATING

Figure 16 Aspects related to "quality of service" (%)



Base: Total respondents (2,528)

Based on your personal experience or impression, please rate each of the following statements related to the quality of private healthcare services using a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied.

3.2.5. Rating of general services in private healthcare

The average rating of the aspects related to "general services" is 7.3, and so private healthcare maintains a rating of "B" in all aspects analysed.

The cleanliness and the comfort of facilities and equipment, with average scores of 7.9 and 7.8, respectively, were the top rated aspects, much higher than ease of parking, which received the lowest score: 6.3 (Figure 17).

EASE OF PARKING RECEIVED THE LOWEST SCORE

Figure 17 Rating of aspects related to "general services" (%)

General services	Score of 7 or higher	Average (Scale of 1 to 10)
Cleanliness of the facilities and equipment	84%	7.9
Comfort of the facilities	83%	7.8
Non-healthcare services (food, etc.)	60%	7.0
Ease of parking	50%	6.3

Scale: 0-10, 11-20, 21-30, 31-40, 41-50, 51-60, 61-70, 71-80, 81-90, 91-100

Base: *Total respondents (2,528)*

■ Score of 7 or higher

Based on your personal experience or impression, please rate each of the following statements related to the **general services** of private healthcare using a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied.

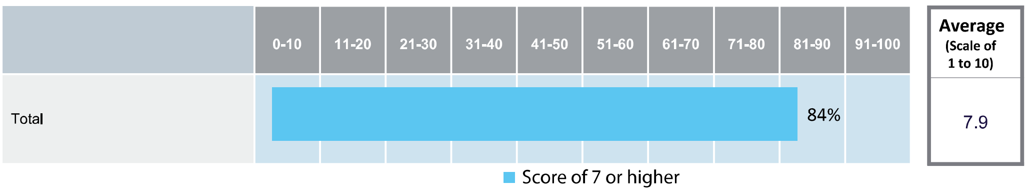
3.3. Outpatient visits: primary care and specialists

The care received from primary care physicians/specialists received a score of 7.9, or a B+, with 84% of policyholders indicating scores of 7 or higher on a scale of 1 to 10. (Figure 18).

This is particularly important when considering that as a service, specialist consultations are used by a high percentage of policyholders, and that consultations with primary care physicians are used the most often.

USERS ARE VERY SATISFIED WITH CARE RECEIVED FROM PRIMARY PHYSICIANS/SPECIALISTS

Figure 18 Satisfaction with treatment by primary care physicians/specialists (%)



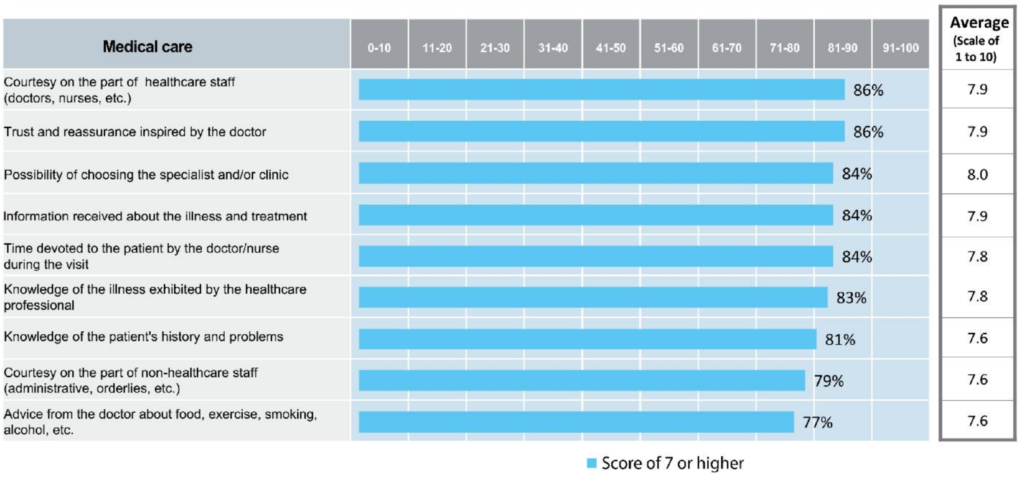
Base: Have been seen by a primary care physician/specialist at some point (2,221)

How would you rate your overall satisfaction with your primary care physician/specialist? Please use a scale where 1 = very dissatisfied and 10 = very satisfied.

The high scores for the various aspects related to "care received by a primary care physician/ specialist" indeed reaffirms the excellent rating by the users of these services.

With a score of 8.0, the possibility of choosing a specialist is the highest rated aspect, followed by the treatment given by healthcare personnel, trustworthiness and reassurance conveyed by the doctor and the information received about the illness and treatment – all them with scores of 7.9 (Figure 19).

Figure 19 Aspects of care received from primary care physicians/specialists (%)



Base: *Have visited a primary care physician or specialist at least once (2,221)*

Based on your personal experience, please evaluate each of the following aspects related to private consulting room care, from both primary care physicians and specialists. Please indicate your satisfaction with the following statements using a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied.

3.4. Accident & Emergency

A&E services are viewed very favourably. 87% of policyholders rate this service at 7 or higher, and its average score is 7.9 on a scale of 1 to 10 (Figure 20).

87% OF POLICYHOLDERS RATE THE CARE RECEIVED AT A&E AS ABOVE 7

6 OUT OF 10 POLICYHOLDERS HAVE USED A&E SERVICES AT LEAST ONCE AND HAVE GIVEN IT AN AVERAGE RATING OF B+

Figure 20 Satisfaction with A&E care

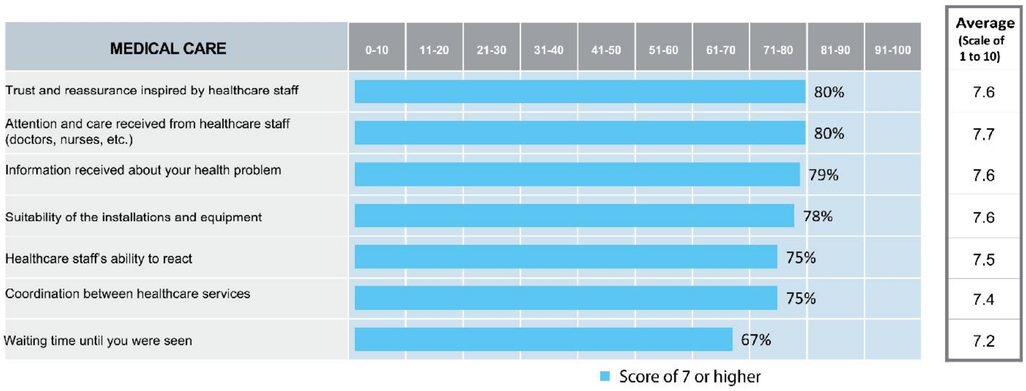
Base: *Have been to A&E at least once (1,302)*

How would you rate your overall satisfaction with the care at private A&E departments? Please use a scale where 1 = very dissatisfied and 10 = very satisfied.

The scores stand at 7.2 and higher for all aspects related to the care received at A&E, thus showing that its users view it as excellent.

In this respect, the attention and care given by healthcare personnel, the suitability of the facilities and equipment, the trustworthiness and reassurance conveyed by healthcare personnel, and the information received about the health issue are the elements that are highlighted most often (Figure 21).

Figure 21 Score of A&E care (%)



Base: *Have been to A&E at least once (1,302)*

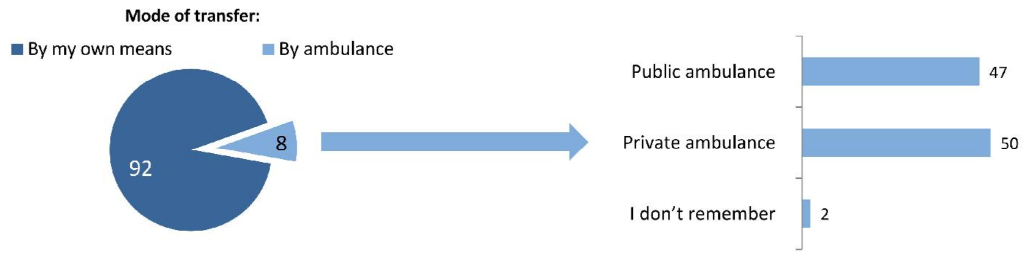
Now think about the different aspects related to the care you received at A&E. Please indicate your satisfaction with the following statements using a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied.

Nearly all respondents get to A&E by their own means. The use between private and public ambulances is similar (Figure 22).

Note that two-thirds of respondents who used the A&E services at both public and private centres indicate that the care is better at the private centres (Figure 22).

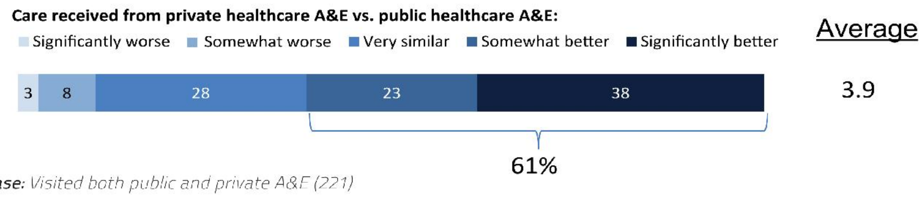
TWO-THIRDS OF A&E PATIENTS HIGHLIGHT THE QUALITY OF CARE RECEIVED IN PRIVATE HEALTHCARE

Figure 22 Transfer to A&E



Base: *Visited A&E (616)*

Base: *Visited A&E by ambulance (51)*



Base: *Visited both public and private A&E (221)*

Thinking about the last time you went to the A&E, please indicate how your got there:
In a public ambulance (SAMUR, SUMA, etc.) or private ambulance (provided by your private insurance).
Considering your experience, please choose the statement you agree with the most.

3.5. Hospitalisation

In total, 1 out of 2 policyholders were hospitalised at least once, although only 13% were hospitalised in the past year. The average duration of hospitalisation is roughly 4 days.

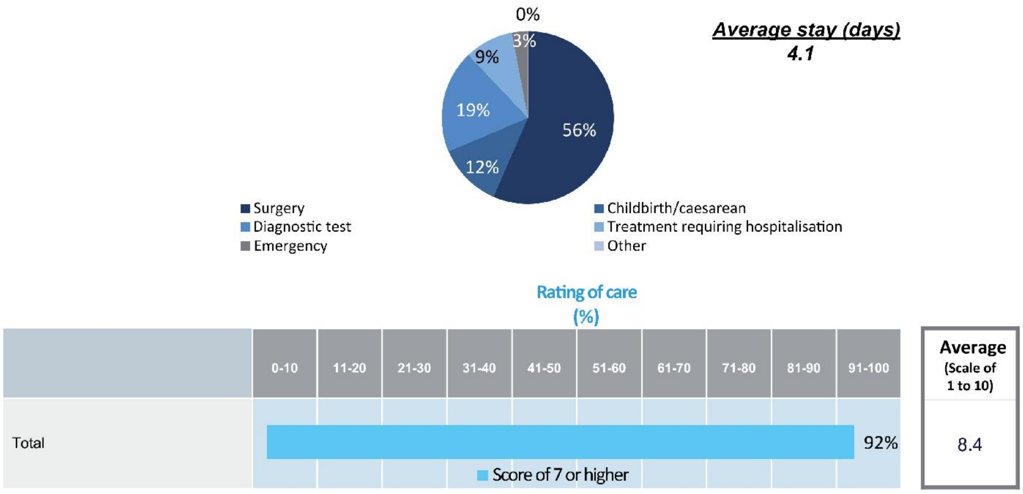
The main reason for hospitalisation was surgery (56% of cases). A fifth of hospitalisations were for diagnostic tests and 12% were for childbirth/caesarean.

With an average score of 8.4, the care received during hospitalisation is the top rated service of all aspects analysed. In all, 92% of policyholders were hospitalised at least once, giving scores of 7 or higher, which makes for an outstanding care rating (Figure 23).

1 OUT OF EVERY 2 POLICYHOLDERS WERE HOSPITALISED AT LEAST ONCE IN A PRIVATE HOSPITAL, WITH SURGERY AS THE MAIN REASON

CARE RECEIVED DURING HOSPITALISATION IS THE TOP RATED SERVICE

Figure 23 Reason for hospitalisation, average stay and rating of care received



Base: Has been hospitalised at least once (1,223)

What was the reason for your last hospital admission?
How long were you hospitalised?
How would you rate your overall satisfaction with the care you received during your stay at a private hospital? Please use a scale where 1 = very dissatisfied and 10 = very satisfied.

Nearly all the aspects related to the care received during hospitalisation have a rating of B+, or higher than 8 points, which highlights the excellent image of a major patient service, and where the quality of private healthcare particularly stands out (Figure 24).

Figure 24 Rating of aspects related to care received during hospitalisation (%)

MEDICAL CARE	Score of 7 or higher	Average (Scale of 1 to 10)
Patient visiting hours	92%	8.5
Attention and care received from healthcare staff (doctors, nurses, etc.)	91%	8.3
Comfort of the rooms	90%	8.3
Equipment and technology in place at the hospital	89%	8.2
Information received about the patient's progress	88%	8.2
Time taken for admission	88%	8.1
Additional services (food, toilets, TV, etc.)	84%	7.9
Paperwork required for admission	84%	7.9

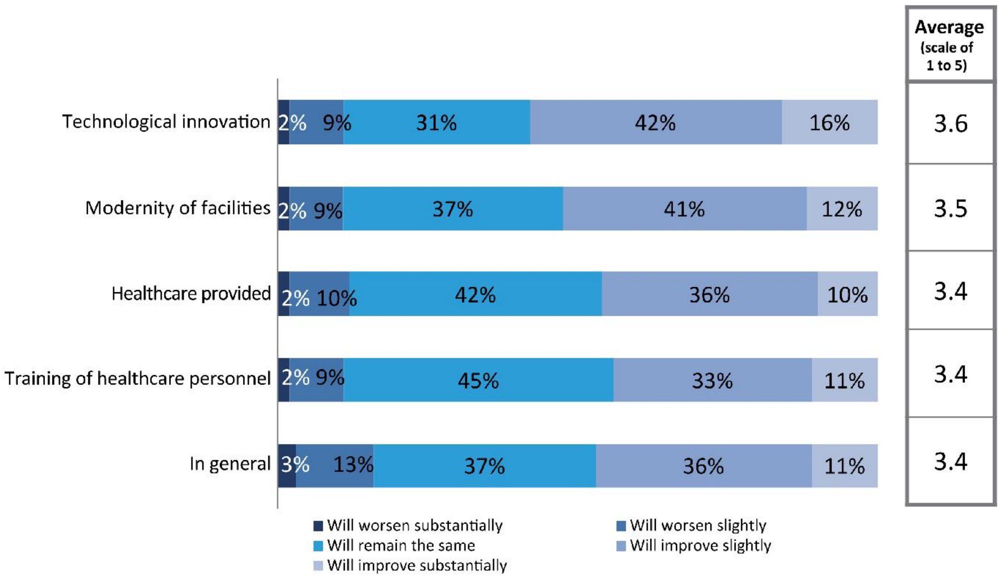
Base: Has been hospitalised at least once (1,223)

Now think about the different aspects related to the care you received during hospitalisation at a private hospital. Please indicate your degree of satisfaction with the following statements using a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied.

3.6. Outlook for private healthcare in the coming years

Moderate optimism is expected for private healthcare in the coming years, which is growing in terms of innovation and modernity of facilities (Figure 25).

Figure 25 Trends in private healthcare (%)



Base: Total respondents (2,528)

How do you see the outlook for private healthcare in the coming years in the following areas?


2014

COMPARISON: 2013 VS. 2014

A trend analysis between the 2013 and 2014 Spanish Private Healthcare Sector Barometers is given below. This comparison refers to the main aspects of the study: overall satisfaction, care, hospitalisation and A&E.

The main conclusion from this comparative analysis is that there are no statistically significant differences between the two periods, as the B rating of private healthcare remains stable, which underscores its "excellent state of health".

The third consecutive Spanish Private Healthcare Sector Barometer demonstrates the consistency and reliability of the results obtained, with the outstanding features of private healthcare being speed, care and concern for patients and their quality of life, which is especially important in these difficult times, and where private healthcare has maintained its excellent image.

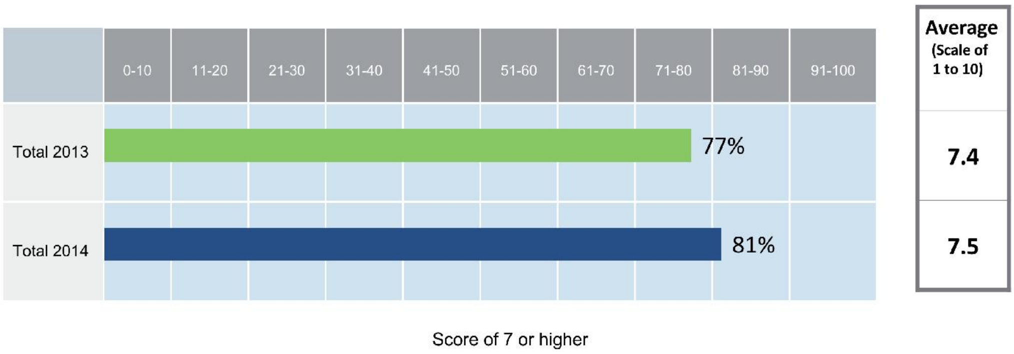
4.1. Services provided by private healthcare

Overall satisfaction maintains its B rating (7.5). This is a very favourable result, which has increased to 81% of respondents giving private healthcare a score of over 7 points on a scale of 1 to 10 (Figure 26).

PRIVATE HEALTHCARE HAS MAINTAINED ITS B RATING OVER THE PAST FEW YEARS

THE PERCENTAGE OF USERS RATING IT ABOVE 7 HAS INCREASED TO 81%

Figure 26 Satisfaction with private healthcare services (%)



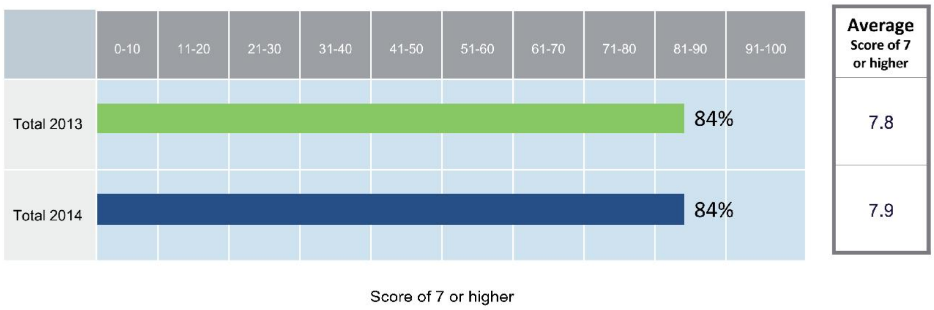
Base: Total respondents (2,556/2,528)

What is your level of satisfaction with the services offered by private healthcare in Spain? Please use a scale where 1 = very dissatisfied and 10 = very satisfied.

4.2. Primary care and specialists

Primary care and specialist consultation maintains its excellent rating (7.9), with 84% of users giving it a score of 7 or more on a scale of 1 to 10 (Figure 27).

Figure 27 Satisfaction with doctor visit (%)



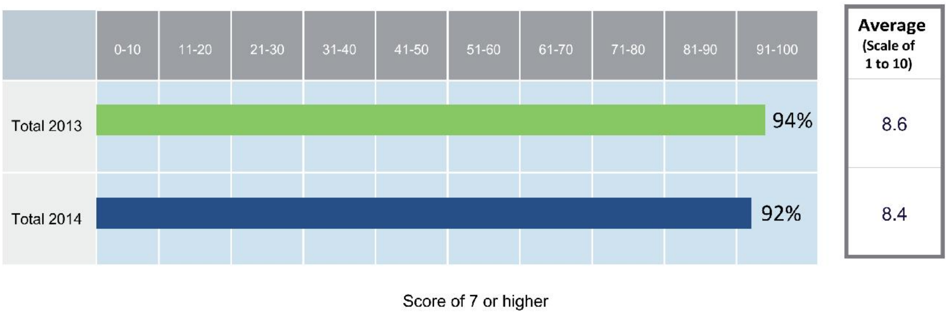
Base: *Total respondents (2,556/2,528)*

How would you rate your overall satisfaction with your primary care physician or specialist consultation? Please use a scale where 1 = very dissatisfied and 10 = very satisfied.

4.3. Hospitalisation

The care received during hospitalisation maintains an outstanding rating, with an average score of 8.4. The difference from the previous results (8.6 vs. 8.4) is not statistically significant, and so hospitalisation continues to be the top rated service of those analysed (Figure 28).

Figure 28 Satisfaction with hospitalisation (%)



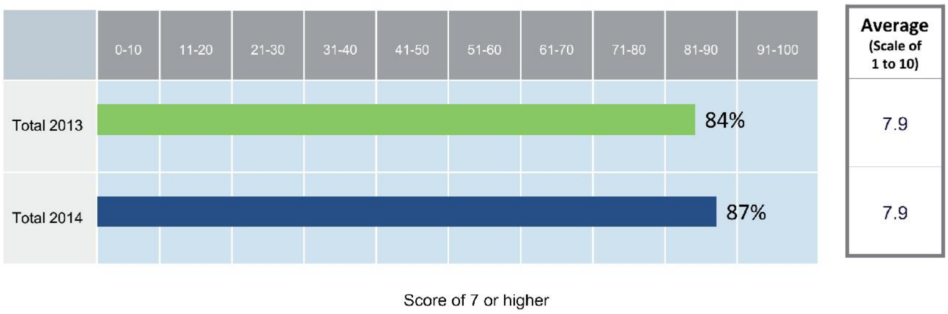
Base: Total respondents (2,556/2,528)

How would you rate your overall satisfaction with the care you received during your stay in a private hospital?

4.4. Accident & Emergency

A&E services maintain the excellent rating from the previous results (7.9 out of 10), with the percentage of policyholders indicating 7 or higher (Figure 29).

Figure 29 Satisfaction with A&E (%)



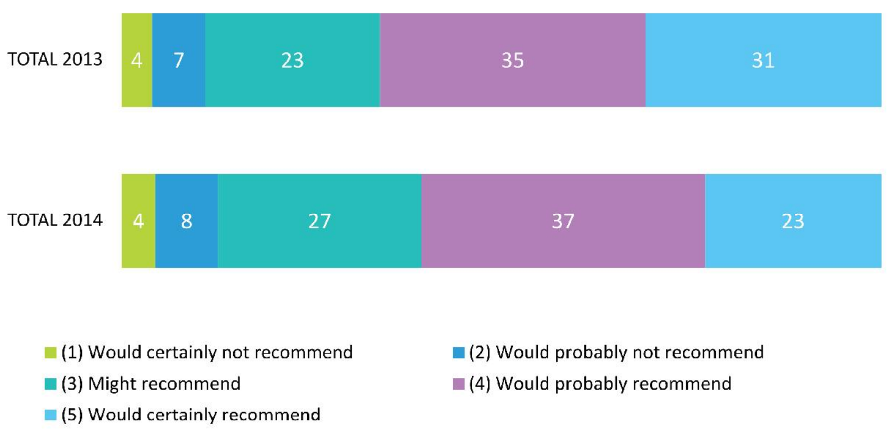
Base: Total respondents (2,556/2,528)

How would you rate your overall satisfaction with the the A&E service provided through private healthcare? Please use a scale where 1 = very dissatisfied and 10 = very satisfied.

4.5. Likelihood of recommendation

A high percentage of users say they would recommend private healthcare to their families and friends, with no statistically significant difference from the previous results: 87% of users would recommend private healthcare now vs. 89% in 2013 (Figure 30).

Figure 30 Likelihood of recommending private healthcare services



Base: *Total respondents (2,555/2,528)*

How likely are you to recommend private healthcare services to a friend or relative?


2014

CONCLUSIONS

For the third consecutive year, the Spanish Private Healthcare Sector Barometer once again reveals the excellent care provided by private healthcare. That such high ratings have been obtained for 3 years in a row lends considerable consistency, reliability and credibility to the results, which stems from the outstanding work being done by the different professionals in private healthcare.

The speed of private healthcare, the treatment and professionalism of healthcare personnel, the trustworthiness and reassurance they convey, the wide range of services and the information given to users are all rated favourably. These aspects have become the hallmarks of private healthcare, which is clearly geared towards patients and improving their quality of life.

1. High level of satisfaction with private healthcare services.

Users of private healthcare, most of whom also use public healthcare, give the different services provided by the private system a rating of B. In total, 81% of policyholders give it a score of 7 or higher on a scale of 1 to 10.

2. A large percentage of users would recommend private healthcare.

In all, 9 out of 10 users would recommend private healthcare in general and the different services, hospitalisation in particular, to their family and friends.

3. The more often people use private healthcare, the more satisfied they are with it.

A total of 91% of policyholders used private healthcare at least once, and 67% of them used it in the past year.

More frequent use of private healthcare services increases the degree of user satisfaction. As such, private healthcare received an average score of 6.7, on a scale of 1 to 10, from people who have never used it; 7.5 from people who used it at least once; and 7.6, which is the highest score, from people who used it in the past year.

4. The care provided in consultations and A&E receives a B+, a score which is higher still for hospitalisation.

Primary and specialist care and A&E were both viewed as excellent with an average score of 7.9.

Hospitalisation is the top rated service with a score of 8.4 out of 10. All aspects related to hospitalisation had an average score of 8.2, which shows the excellent care provided by private healthcare in a major patient service.

5. Policyholders highlight the major strengths of private healthcare, including the speed of care, the wide range of specialties and the professionalism of healthcare personnel.

The speed/flexibility of private healthcare is clearly recognised as an intrinsic aspect of it, which is an obvious benefit for patients in terms of making an appointment, having a diagnostic test done and receiving test results quickly. The wide range of specialties and high degree of professionalism of the healthcare personnel, with the trustworthiness and reassurance they convey, are also relevant aspects highlighted.

6. The aspects where private healthcare has the lowest ratings are for services not related to healthcare.

As with the previous Barometers, ease of parking (6.3), signposting on roads and entrances to the services of the centres (6.8), and proximity of hospitals/centres (6.9) have the lowest ratings.

7. The Barometer results are reliable and consistent, with no statistically significant differences.

As mentioned above, there are no major differences from the results of 2013. Obtaining excellent results for the third consecutive year speaks to the work and continued efforts on the part of private healthcare and lends consistency, reliability and credibility to the Barometer data which reflects the favourable view of private healthcare. This of course stems from the dedicated and ongoing efforts being made.

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Work carried out by Kantar Health.

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