IDIS REPORT

PRIVATE HEALTHCARE: ADDING VALUE

# Spanish Private Healthcare Industry Barometer 2013

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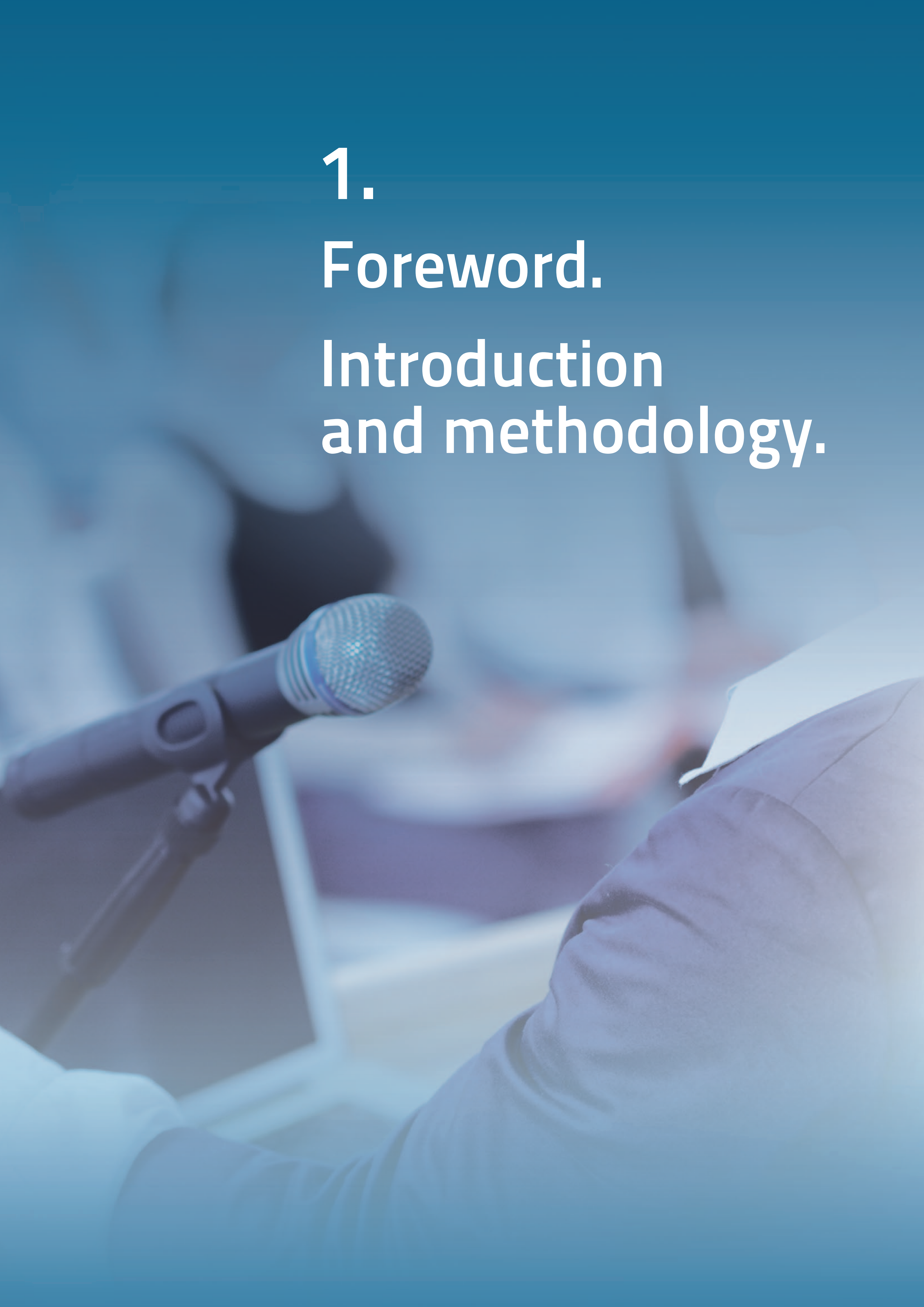


# Foreword

Private healthcare is a reality in Spain, as in the rest of Europe. It accounts for 2.5% of Spain's GDP (26.2% of healthcare spending), and Spain ranks fourth in Europe in terms of private healthcare penetration. This is because over seven million people maintain double insurance—public and private—and over two million civil servants belong to mutual healthcare systems such as MUFACE, MUGEJU and ISFAS. As a result, close to 10 million people in Spain relieve the public healthcare system of the associated costs and care burden, hence making it more solvent and sustainable.

The more than 234,000 professionals who work in private healthcare—including 55,000 doctors—lend their high degree of professionalism and dedication to the benefit of patients' health and their families' peace of mind. This is evidenced in the RESA survey (Resultados de Salud 2012), which reveals not only the quality of private healthcare but also the excellent results it achieves in terms of morbidity and mortality, even in highly complex areas such as as neurosurgery, cardiovascular surgery, oncology, paediatric surgery, etc.

From the standpoint of patients, the best indicator is their satisfaction, as assessed by IDIS in the Spanish Private Healthcare Industry Barometer 2013 presented here, whose main conclusion is that over 89% of respondents—all of whom have dual cover and are very familiar with both systems—would recommend private healthcare. This is ratified by the fact that over 84% of civil servants opt for private healthcare each year.

The high level of activity in the private healthcare system in Spain is evidenced by its share of total healthcare activities: 24% of discharges, 20% of A&E visits, and 30% of operations, which indisputably contributes to reducing waiting lists and the care burden in the public healthcare system. This is made possible by private healthcare's focus on quality, the use of the most advanced technology, and support for training its professionals, whose top priority is the optimal care and preventive medicine for patients.

The findings of the Spanish Private Healthcare Industry Barometer 2013 solidly support private care, with the result that it must necessarily be considered in the strategic planning of healthcare in Spain, with a view to considering all available expertise and experience in order to build an excellent healthcare system for citizens which is sustainable, solvent, efficient and effective.

For that reason, and so as not to pursue a contra-cyclical vision that flies in the face of the evidence, it is time to abolish the myths that seek to downplay a sector that is so important, dynamic (in all senses of the word) and innovative. We can achieve this by continuing with the line of work that IDIS has always pursued. Instead of demagoguery, this approach involves providing data from independent third parties that ratifies the entire industry's added value with figures and charts. The data reveals the private healthcare sector's enormous investment in innovation, cutting-edge research, complex care approaches and continuous training for its professionals.

If we did not have the existing private healthcare industry, we would have to invent it, since the public system is experiencing financial difficulties and threats to its stability with regard to fulfilling its guiding principles: universality, fairness, cohesion, access, and public funding. In order to secure the necessary solvency for the public system, the approach that would be most beneficial for the entire population would consists of promoting the private healthcare system, protecting it and safeguarding its good name and reputation, while taking advantage of the synergies it offers and enhancing the complementarity and mutual support between the two systems. In short, to pursue the foundational goal of IDIS, namely, to seek a single healthcare system with twin avenues for insurance and care.

**José Ramón Rubio**
President of Instituto para el Desarrollo e Integración de la Sanidad

# Introduction and Methodology

The Spanish Private Healthcare Industry Barometer 2013 was produced by Kantar Health.

- **Universe:** Spanish residents, both male and female, aged 18 and older with private health insurance, be it general medical insurance, a reimbursement policy, or a civil service mutual scheme.
- **Sample size:** non-proportional allocation. A total of 2,556 interviews were conducted, with the following geographic distribution

| Regions | No. of interviewees |
|---|---|
| Andalusia | 250 |
| Aragon | 146 |
| Asturias | 101 |
| Balearic Islands | 101 |
| Canary Islands | 100 |
| Cantabria | 101 |
| Castilla y León | 153 |
| Castilla La Mancha | 101 |
| Catalonia | 267 |
| Madrid | 265 |
| Valencia | 202 |
| Extremadura | 75 |
| Galicia | 202 |
| Navarra | 96 |
| La Rioja | 95 |
| Murcia | 101 |
| Basque Country | 200 |
| **TOTAL** | **2.556** |

- **Weighting:** based on the number of enrollees by region and age (according to the population), 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 indeterminacy, P = Q.
- **Fieldwork:** from 17 January to 14 February, 2013.
- **Methodology:** Information was collected through Computer Assisted Web Interviews (CAWI) among private healthcare enrollees in Kantar's online panel.
- **Questionnaire:** structured and closed for the most part, with two different valuation scales, one of them a Likert-type scale: from 1 to 5 points and from 1 to 10 points, where the highest score is always the most positive.

## 2,556 interviews with holders of private health insurance

# 2.

# Results of the Spanish Private Healthcare Industry Barometer 2013

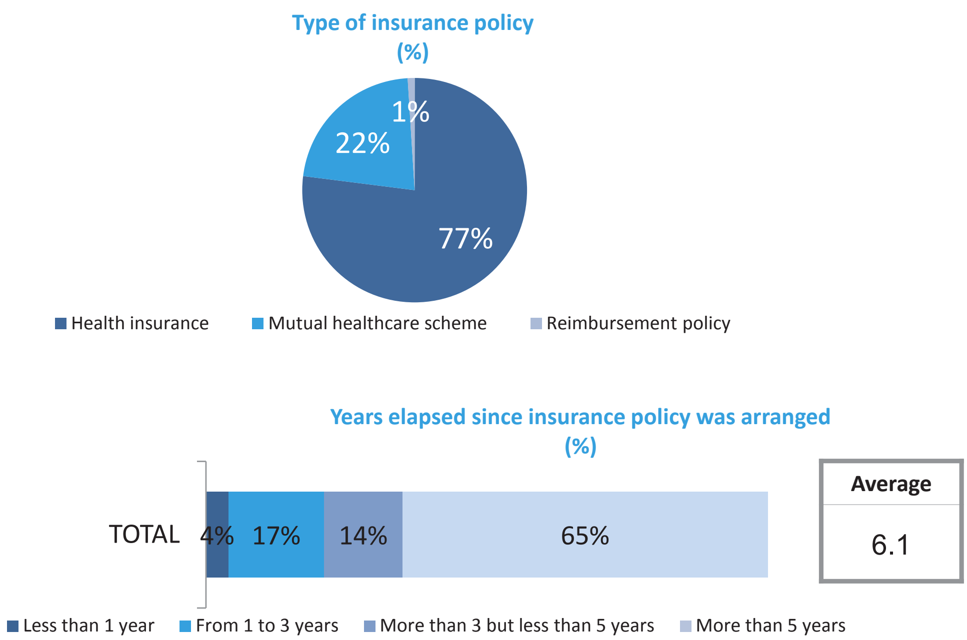
# 2.1.
# Private health insurance: arrangement, length of use and services used

77% of people with private cover have a direct healthcare policy (the most common form). 22% of people with private healthcare cover were members of a mutual arrangement, in which reimbursement of expenses is negligible.

Moreover, 65% of respondents have had a private healthcare policy for over 5 years, the average being around 6 years (Fig. 1).

People have had a private health policy for 6.1 years on average

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




***Base:*** *Have used (2,556)*

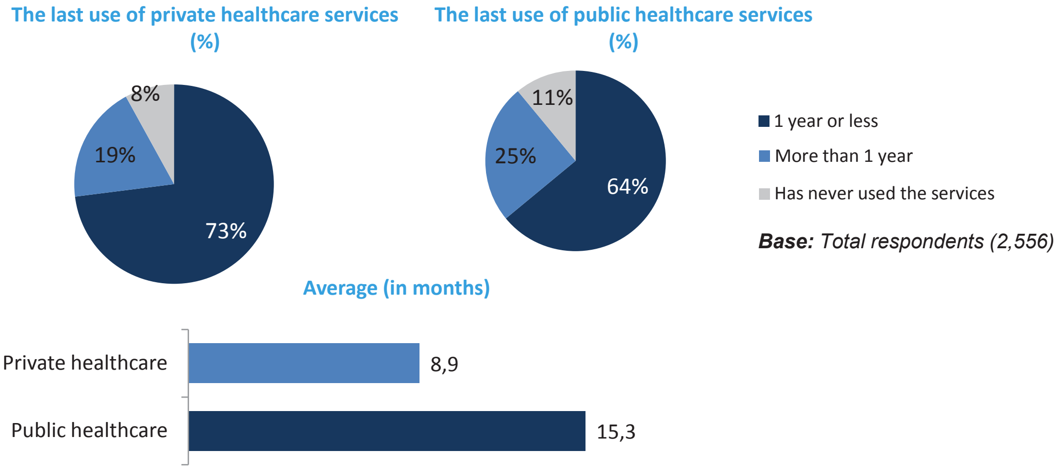
Which of the following private healthcare policies have you arranged for yourself or a family member?
How long has the policy been in force?

92% of respondents had used the private healthcare system at some point, and 3 out of 4 had used it in the last year.

Nine out of ten beneficiaries of a private healthcare policy also use the public healthcare system, although they use the private system much more frequently on average: it had been 9 months since they had last used the private system, compared with 15 months since they had last used the public system (Fig. 2A).

## 92% of users have made use of private healthcare at some point

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



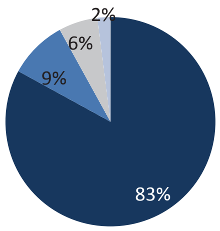

***Base:*** *Have used (2,361)*

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

83% of enrollees are aware of the public healthcare system, because they are users of both systems (Fig. 2B).

## 83% of enrollees are aware of the public healthcare system, because they are users of both systems

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




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

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?

Consultation with a specialist is the service used most frequently by beneficiaries of private healthcare. 92% of private healthcare users had visited a specialist at some point, and 3 out of 4 had done so in the preceding 12 months (average frequency: 3.5 visits per year).

Diagnostic tests rank second in frequency of use among respondents. Therefore, 80% of enrollees had used this service at some point, and 6 out of 10 had used it in the last year; the average frequency of visits is 3 per year.

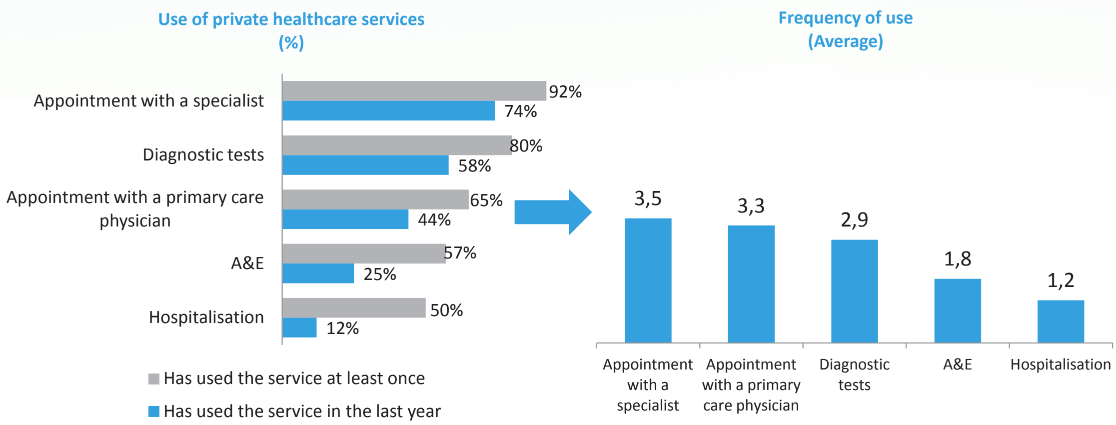
The number of private healthcare enrollees who had used primary care and A&E were similar (65% vs. 57%); nevertheless, although 44% of insured had visited their primary care doctor in the preceding year, only 1 out of 4 insured had needed to visit A&E in the preceding 12 months.

Finally, 1 out of 2 respondents had required a hospital admission at some point in the past, although only 12% had been admitted in the preceding year (Fig. 3).

## Visits to a specialist and diagnostic tests were the services used most frequently

## One out of every two enrollees has been admitted to hospital at least once

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



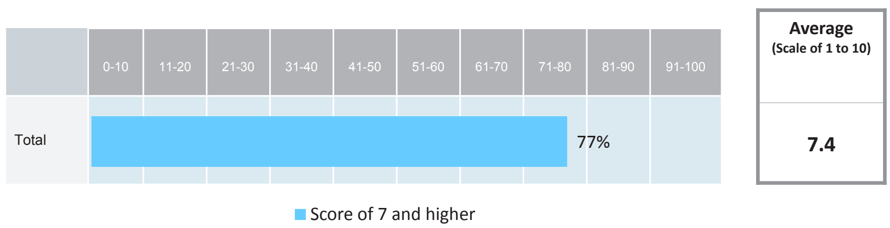

***Base:*** *Have used private healthcare services at least once (2,361)* ***Base:*** *Used the service in the last year*

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?

# 2.2.
# Opinion of private healthcare services

A high degree of satisfaction with private healthcare services in Spain is observed. The average score was 7.4, on a scale of 1 to 10, with 8 out of 10 respondents giving an average score of 7 or higher (Fig. 4).

Figure 4 Satisfaction with private healthcare services




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

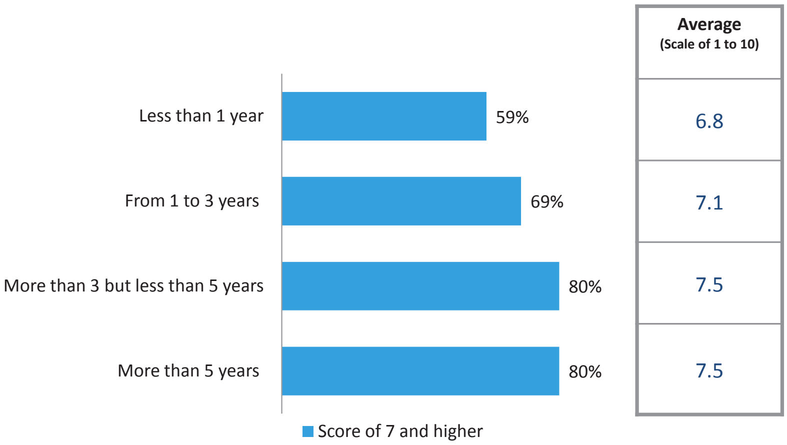
How satisfied are you with private healthcare services in Spain?

## The older the policy, the higher the score given to private healthcare

The time for which the respondent has been insured is positively correlated with the degree of satisfaction: the longer the respondent has been insured, the greater the degree of satisfaction with the services.

Whereas respondents who have been insured for less than a year gave private healthcare services a score of 6.8 points, those who have been insured for 1-3 years gave a 7.1 score, while those have been insured for over 3 years gave a score of 7.5 (Fig. 5).

Figure 5 Degree of satisfaction as a function of the time the person has been insured (%)




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

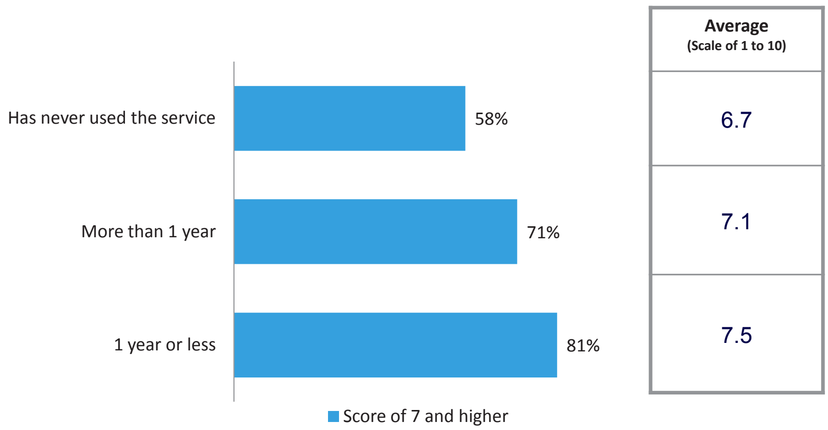
How long have you had the aforementioned insurance?
How satisfied are you with private healthcare services in Spain?

It is significant that the score given to private healthcare is directly related to the time elapsed since the last time the respondent made use of these services. Persons who had never used private healthcare rated it 6.7 points on average, persons who have used it over a year ago rated it 7.1, while those who have used private healthcare in the last year rate it 7.5.

Consequently, the more recent the experience of using private healthcare services, the greater the degree of satisfaction with them (Fig. 6).

## Private healthcare was rated most highly by enrollees who had used the services in the last year

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



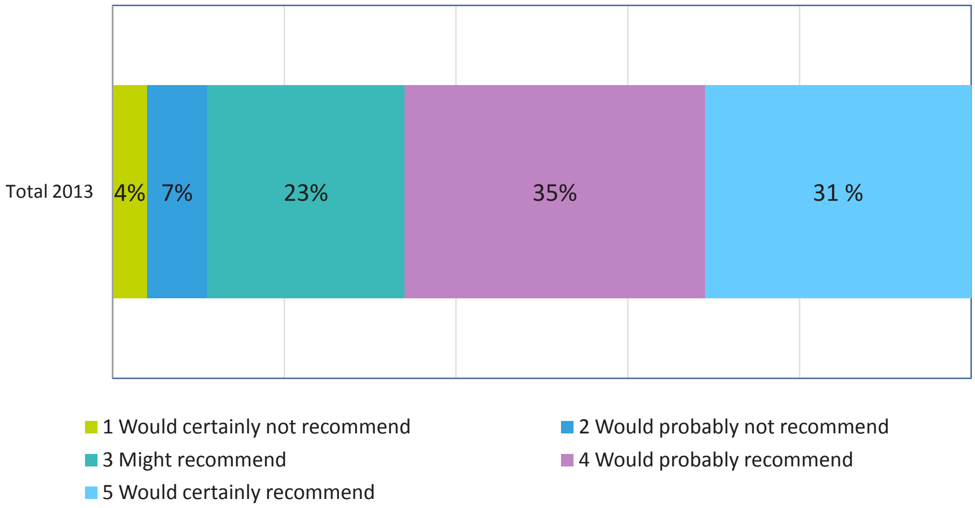

***Base:*** *Total respondents (2,556)*

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

Users are very satisfied with public healthcare services: 89% would recommend them to relatives and friends (Fig. 7).

## 89% would recommend private healthcare

Figure 7 Likelihood of recommending private healthcare



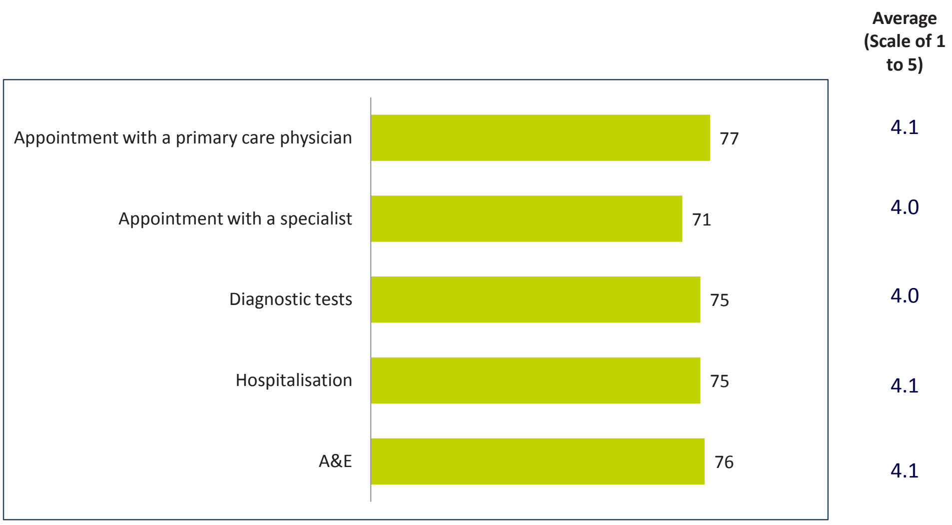

How likely are you to recommend private healthcare services to a friend or relative?

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

Three out of four users have made use of one or more private healthcare services and indicate that they are very likely to recommend them (4, on a scale of 1 to 5) (Fig. 8).

## 3 out of 4 users of the various private healthcare services would recommend them

Figure 8 Likelihood of recommending private healthcare




***Base:*** *Have used various services*

**Q.9b** Which of the following private healthcare services have you used in the last year?
**Q.7b** How likely are you to recommend private healthcare services to a friend or relative?

# 2.2.1.
# Advantages and disadvantages of private healthcare

80% of enrollees spontaneously cite the agility/speed of private healthcare as its main advantage.

Care and courtesy, coupled with comfort, are other advantages cited by one-third of respondents; one-quarter refer to aspects of specialist care, such as greater coverage and the possibility of choosing their specialist (Fig. 9).

Respondents highlight the range of care as one of the great strengths of private healthcare

Figure 9 Advantages of private healthcare (Spontaneous) (%)

| Advantages | TOTAL |
|---|---|
| **SPEED/AGILITY OF PRIVATE HEALTHCARE** | **83** |
| Short waiting time for appointments | 42 |
| Overall speed of services | 41 |
| Short waiting time for diagnostic tests | 8 |
| **ATTENTION** | **30** |
| Courtesy | 19 |
| Personalised attention | 11 |
| **COMFORT** | **27** |
| Individual rooms/privacy | 7 |
| Comfort | 9 |
| Better/more modern facilities | 8 |
| **SPECIALISTS** | **23** |
| Possibility of choosing a specialist | 12 |
| **OTHERS** | **15** |
| Doctors' professionalism, qualifications | 4 |
| Service quality | 3 |
| Flexibility in scheduling | 1 |
| **NONE** | **1** |

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

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

As regards disadvantages, 1 out of 2 respondents referred to the cost of insurance as the main disadvantage.

13% of respondents spontaneously could not cite any disadvantage of private healthcare (Fig. 10)

## 13% of respondents could not cite any disadvantages of private healthcare

Figure 10 Disadvantages of private healthcare (Spontaneous) (%)

| Disadvantages | TOTAL |
|---|---|
| COST | 51 |
| Payments/price | 47 |
| FEWER RESOURCES/LESS-ADVANCED TECHNOLOGY | 19 |
| COVERAGE | 11 |
| WAITING TIMES | 5 |
| OTHERS | 14 |
| Less qualified medical team | 3 |
| Fewer services provided/covered | 2 |
| Overcrowding at doctor's offices | 2 |
| NONE | 13 |

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

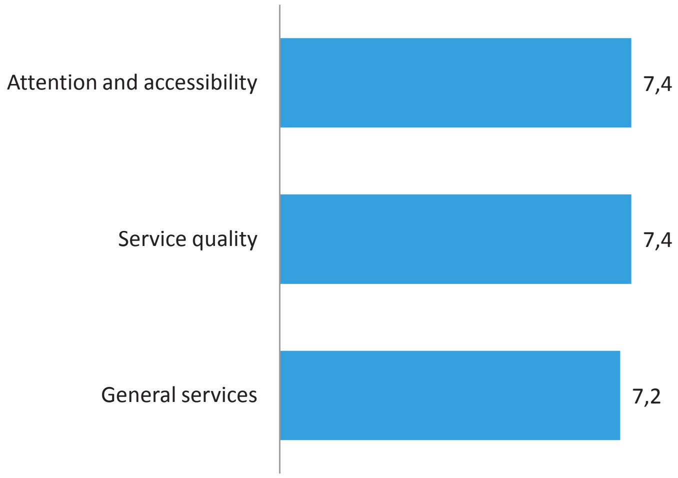
In your opinion, what are the main advantages and **disadvantages** of private healthcare?

# 2.2.2.
# Rating of the various services provided by private healthcare

In order to assess the various aspects of private healthcare as broadly as possible, this Barometer identifies three main areas: care and accessibility, service quality, and general services.

The following chart (Fig. 11) shows that private healthcare scores a B in each of the three sets, i.e. users are very satisfied.

Figure 11 Average rating of the various services provided by private healthcare




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

# 2.2.3.
# Rating of the care and accessibility of the services provided by private healthcare

Figure 12 Attributes related to attention and accessibility (%)

| Attention and accessibility | Score of 7 and higher (%) | Overall average (Scale of 1 to 10) 7.4 |
|---|---|---|
| Time taken to receive the results of diagnostic tests requested by the doctor | 81 | 7.8 |
| Time taken to perform diagnostic tests, from the time they were requested | 80 | 7.7 |
| Ease of making an appointment | 78 | 7.7 |
| Lag between making the appointment and seeing the doctor | 77 | 7.5 |
| Adaptation of the infrastructure to persons with mobility difficulties, the elderly | 73 | 7.4 |
| Attention and service at the information desk | 72 | 7.4 |
| Waiting time for a surgical operation | 70 | 7.4 |
| Hotline operating hours | 69 | 7.2 |
| Proximity of hospitals/clinics | 60 | 6.9 |
| Signage on roads and entrances to clinics | 59 | 6.8 |

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

■ Score of 7 and higher

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

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

Aspects related to attention and accessibility were viewed as very positive, and this set of services received an average score of 7.4.

The most notable aspects are related to the speed/agility of private healthcare, in line with the advantages mentioned spontaneously by private healthcare enrollees. Specifically, respondents highlighted the ease of making appointments, and the waiting time for diagnostic tests and results, with average scores of very close to 8 points.

They are followed, with similarly high average scores, by the time that the doctor takes to see the patient from the time the appointment was requested (average score: 7.5), and the waiting time for a surgical operation (7.4).

The only two aspects that scored slightly below 7 were proximity of clinics/hospitals (6.9) and signage on the routes for getting to the clinics (6.8) (Fig. 12).

**The speed and agility with which tests are performed and results are received was viewed as very positive**

# 2.2.4.
# Rating of private healthcare service quality

The set of attributes related to service quality received 7.4 points, i.e. the same score as attention and accessibility, with all attributes in this set obtaining an average score of over 7, evidencing the high level of satisfaction with the quality of private healthcare services.

Courtesy on the part of healthcare professionals received an average score of 7.9 and was the most highly-valued attribute, followed by the broad coverage of specialities, which received a score of 7.6, and courtesy on the part of non-healthcare staff (7.5).

Attributes such as maintenance of the medical equipment and the technology and resources available in private healthcare services received scores of 7.4 and 7.3, respectively (Fig. 13).

## Courtesy on the part of healthcare professionals during outpatient visits was viewed as excellent

## The broad range of specialities/professionals received a very positive score

Figure 13 Aspects related to quality of service (%)

| Service quality | Score of 7 and higher (%) | Overall average (Scale of 1 to 10) 7.4 |
|---|---|---|
| Courtesy of healthcare staff (doctors, nurses, etc.) in out-patient clinic | 82 | 7.9 |
| Broad range of specialities/professionals | 78 | 7.6 |
| Courtesy of administrative staff | 76 | 7.5 |
| Maintenance of medical equipment | 74 | 7.4 |
| Technology and resources | 70 | 7.3 |
| Service from the patient care department (department entrusted with ensuring proper patient care) | 68 | 7.2 |
| Use of new technologies (internet, SMS, etc.) for making/confirming appointments, accessing patient records, etc. | 67 | 7.1 |
| Lag between making an appointment and actually seeing the doctor | 66 | 7.1 |

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

■ Score of 7 and higher

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

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

# 2.2.5.
# Rating of general services in private healthcare

Figure 14 Score of general services (%)

| General services | Score of 7 and higher (%) | Overall average (Scale of 1 to 10) |
|---|---|---|
| Overall | | 7.2 |
| Cleanliness of the installations and equipment | 83 | 7.9 |
| Comfort of the installations | 82 | 7.8 |
| Non-health related services (food, etc.) | 60 | 6.9 |
| Parking | 47 | 6.2 |

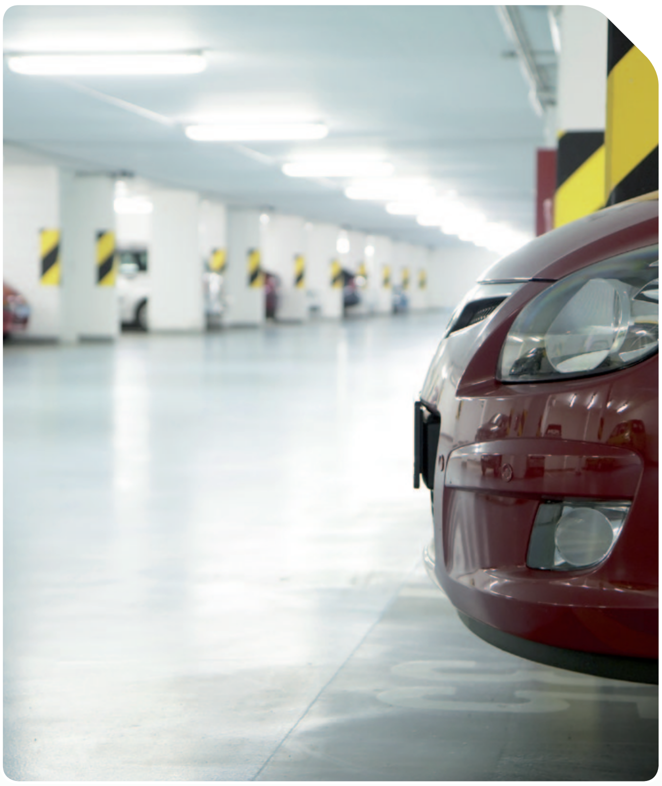
Scale: 0-10, 11-20, 21-30, 31-40, 41-50, 51-60, 61-70, 71-80, 81-90, 91-100

■ Score of 7 and higher

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

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

## The difficulty of finding a parking space is the aspect that received the lowest score



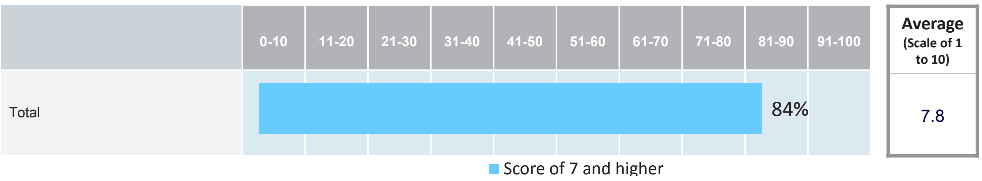
General services as a whole received an average score of 7.2, i.e. the lowest score of the three groups analysed, although it maintained a B rating.

The cleanliness of facilities and equipment and the comfort of the rooms averaged scores of close to 8 points and were the most highly rated aspects, notably higher than the offer of non-health related services, which scored 6.9 on average; parking, received the lowest score: 6.2 (Fig. 14).

# 2.3.
# Outpatient visit: Primary Care and Specialists

Private healthcare enrollees rate care received from their primary care physician/specialist as B+, and 84% assigned a score of 7 or higher on a scale of 1 to 10 (Fig. 15).

Figure 15 Satisfaction with treatment by primary care physician/specialist (%)




***Base:*** *Have visited a primary care physician or specialist at least once (2,300)*

How would you rate your overall satisfaction with your primary care physician or specialist? (scale where 1 = very poor, 10 = very good)

The average overall rating of attributes related to care received in the consulting room is 7.7, affirming users' positive assessment of this service.

The ability to chose specialists is the most highly-valued aspect (8.0), followed by the healthcare professionals' courtesy, the trust and reassurance conveyed by the doctor, and the information received about illnesses and treatments.

Healthcare professionals' knowledge and the information provided to patients about their illnesses and treatment were also rated highly (Fig. 16).

## Users are very satisfied with care received from primary physicians/ specialists

Figure 16 Aspects of care received from primary care physicians/specialists (%)

| Medical care | Score of 7 and higher (0-10 … 91-100) | Overall average (Scale of 1 to 10) 7.7 |
|---|---|---|
| Possibility of choosing the specialist and/or clinic | 84 | 8.0 |
| Courtesy on the part of healthcare staff (doctors, nurses, etc.) | 82 | 7.8 |
| Trust and reassurance inspired by the doctor | 82 | 7.8 |
| Information received about the illness and treatment | 82 | 7.8 |
| Knowledge of the illness exhibited by the healthcare professional | 80 | 7.7 |
| Time devoted to the patient by the doctor/nurse during the visit | 80 | 7.7 |
| Courtesy on the part of non-healthcare staff (administrative, orderlies, etc.) | 77 | 7.5 |
| Knowledge of the patient's history and problems | 77 | 7.5 |
| Advice from the doctor about food, exercise, smoking, alcohol, etc. | 76 | 7.5 |

Score of 7 and higher

***Base:*** *Have visited a primary care physician or specialist at least once (2,300)*

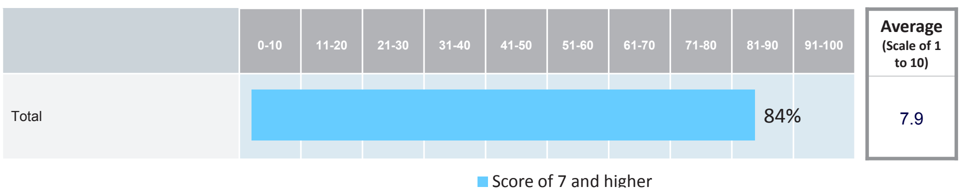
Based on your personal experience, please evaluate each of the following aspects related to **consulting room care**, from both primary care physicians and specialists. Please indicate your satisfaction with the following statements, using a scale of 1 to 10 where 1 = very dissatisfied and 10 = very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

# 2.4.
# Accident & Emergency

Accident & Emergency services (A&E) are also viewed very favourably. A total of 84% of private healthcare enrollees give A&E a score of 7 or higher, and an average score of 7.9, on a scale of 1 to 10 (Fig. 17).

**Six out of very ten enrollees have used A&E at least once, and had a very positive impression**

Figure 17 Satisfaction with A&E care




***Base:*** *Have used A&E at least once (1,336)*

How would you rate your overall satisfaction with private A&E services?
Please use a scale where 1 = very poor and 10 = very good.

Once again, the care received, the quality of facilities and equipment, the trust and reassurance conveyed by healthcare personnel, and the information received by patients regarding their health issues were viewed most favourably.

A&E wait times continued to be viewed unfavourably, although the score remained high: 7.2 (Fig. 18).

## Care received from healthcare professionals was the highest-rated service

Figure 18 Score of A&E care (%)

| MEDICAL CARE | Score of 7 and higher (%) | Overall average (Scale of 1 to 10) 7.6 |
|---|---|---|
| Attention and care received from healthcare staff (doctors, nurses, etc.) | 81 | 7.8 |
| Suitability of the installations and equipment | 81 | 7.7 |
| Trust and reassurance inspired by healthcare staff | 79 | 7.7 |
| Information received about your health problem | 78 | 7.6 |
| Healthcare staff's ability to react | 76 | 7.5 |
| Coordination between healthcare services | 73 | 7.5 |
| Waiting time until you were seen | 68 | 7.2 |

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

■ Score of 7 and higher

***Base:*** *Have used A&E at least once (1,336)*

With regard to the various aspects of **A&E**, please indicate your level of satisfaction with the following statements, using a scale of 1 to 10 where 1 = very dissatisfied and 10 = very satisfied.

# 2.5.
# Hospitalisation

One out of every two enrollees has been admitted to a private hospital, and 12% have been hospitalised in the last year. The average hospital stay is around 4 days.

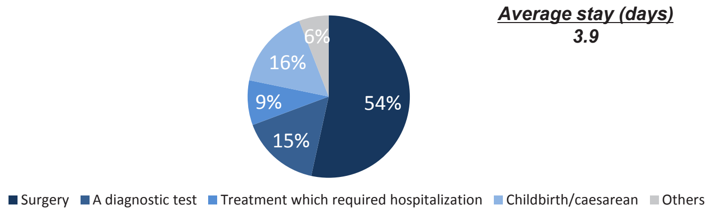
The main reason for hospitalisation was surgery (54% of cases). Approximately 15% of hospitalisations were related to obstetrics, and diagnostic testing accounted for a similar percentage.

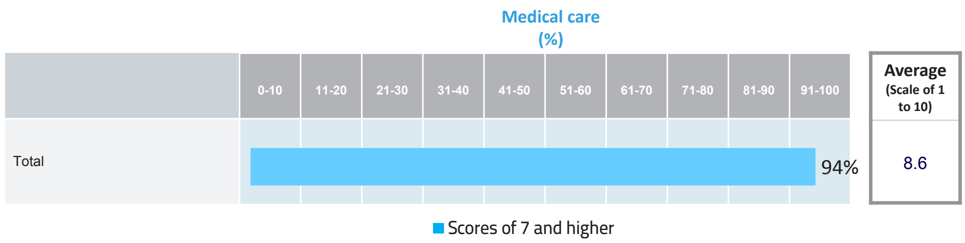
Care received during hospitalisation obtained an average score of 8.6, and was the highest-rated service (Fig. 19).

## Half of all private healthcare enrollees have been hospitalised on at least one occasion. The primary reason was surgery

## Care received during hospitalisation is the most highly-rated service

Figure 19 Reason for hospitalisation, average stay and rating of care received




***Base:*** *Were hospitalised at least once (1,176)*

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 poor and 10 = very good.

All of the attributes related to care received during hospitalisation scored more than 8, equivalent to an A rating, affirming the excellent perception of the service received.

The areas with the highest scores included visiting hours, comfort of the rooms, and the care and information received (Fig. 20).

**All of the parameters evaluated in connection with hospitalisation received a score of over 8**

Figure 20 Rating of aspects related to care received during hospitalisation (%)

| MEDICAL CARE | Score of 7 and higher (0-10 … 91-100) | Overall average (Scale of 1 to 10) 8.4 |
|---|---|---|
| Patient visiting hours | 92 | 8.6 |
| Comfort of the rooms | 92 | 8.5 |
| Attention and care received from healthcare staff (doctors, nurses, etc.) | 92 | 8.4 |
| Information received about the patient's progress | 91 | 8.4 |
| Equipment and technology in place at the hospital | 89 | 8.3 |
| Time taken for admission | 89 | 8.3 |
| Paperwork required for admission | 89 | 8.2 |
| Additional services (food, toilets, TV, etc.) | 85 | 8.1 |

Score of 7 and higher

***Base:*** *Were hospitalised at least once (1,176)*

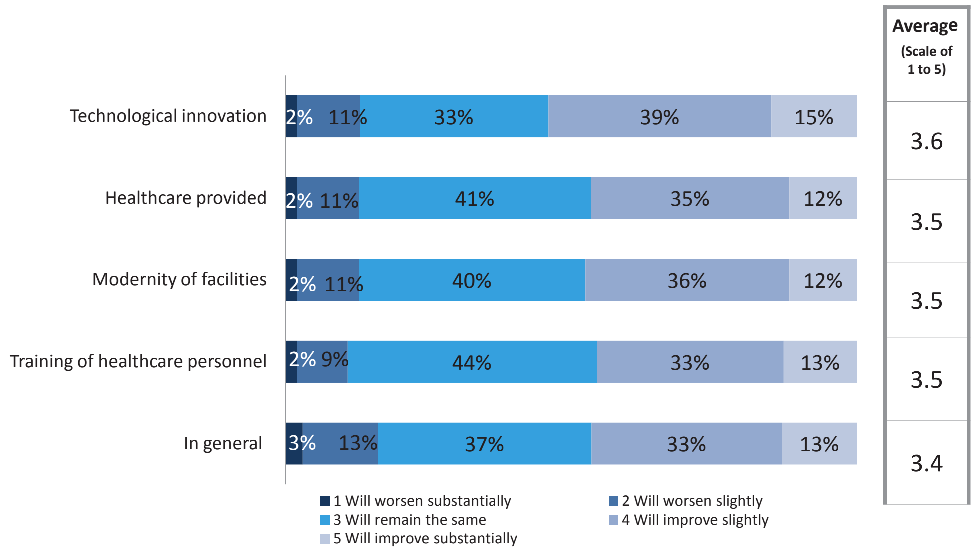
Please rate the following aspects of **care received during hospitalisation at a private hospital**. Please indicate your satisfaction with the following statements, using a scale of 1 to 10, where 1 = very dissatisfied and 10 = very satisfied.

# 2.6.
# Outlook for private healthcare in the next four years

Around half of all respondents were optimistic about the outlook for private healthcare in the coming years.

The area in which the greatest percentage of enrollees expect private healthcare to improve notably is technological innovation, followed by care quality, and facility modernisation (Fig. 21).

Figure 21 Trends in private healthcare (%)




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

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

# 3.

# Comparison: 2012 vs 2013

Below is a comparison of the main features of the Private Healthcare Industry Barometers for 2012 and 2013: overall satisfaction, medical care, hospitalisation and A&E.

The main conclusion of this comparison is that there are no statistically significant differences between the 2012 and 2013 data: private healthcare maintains its B+ rating and remains in "excellent health".

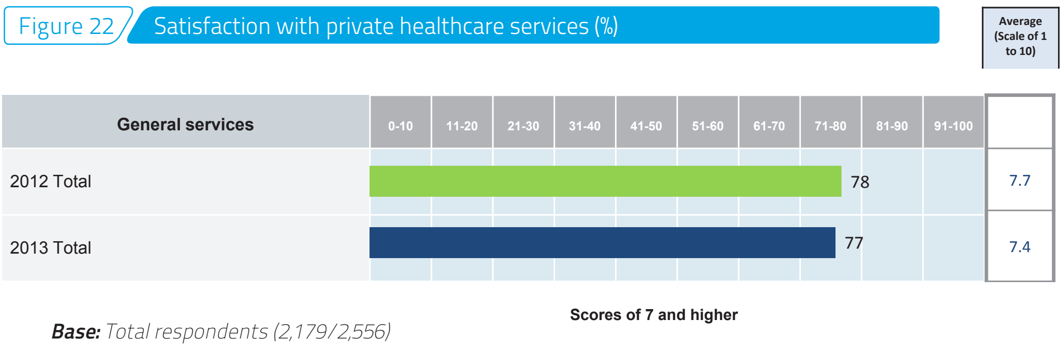
Fieldwork for the Private Healthcare Industry Barometer 2013 was carried out during an especially problematic time for the sector (January 2013): there was confusion about the terms "private management of healthcare" and "privatisation of public healthcare", which was only heightened by media reports and statements by institutions and healthcare professionals. Nevertheless, private healthcare maintained its excellent image and, in most cases, a B+ rating (an A rating for hospitalisation).

# 3.1.
# Services provided by private healthcare

The level of overall satisfaction with this area was B+, comparable to the previous survey; the difference of 0.3 points with respect to 2012 is not statistically significant (Fig. 22).

**In the last two years, private healthcare has maintained a B+ rating in terms of overall satisfaction**

Figure 22 Satisfaction with private healthcare services (%)



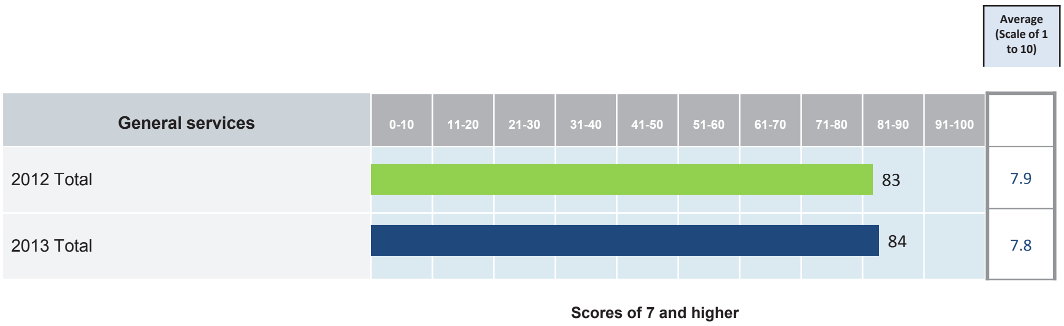

***Base:*** *Total respondents (2,179/2,556)*

What is your level of satisfaction with the services offered by private healthcare in Spain? (1=very poor, 10=very good)

# 3.2.
# Primary Care and Specialists

Satisfaction with primary care remained stable between surveys. In both cases, more than 80% of users rate the care received during their doctor's visit as very positive (Fig. 23).

Figure 23 Satisfaction with doctor visit (%)



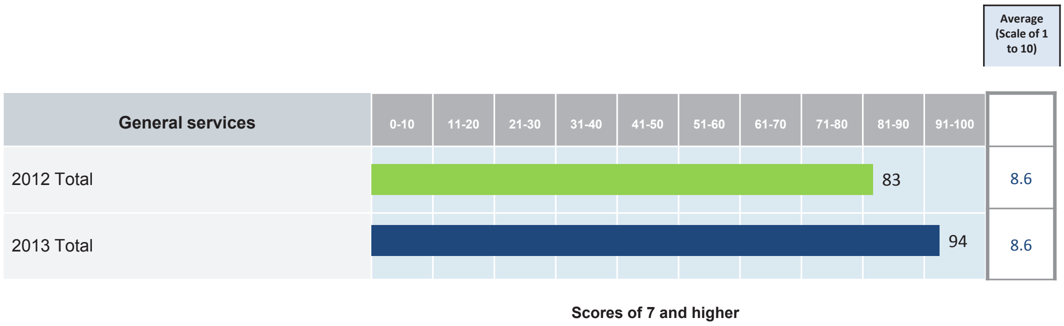

***Base:*** *Have visited a primary care physician or specialist at least once (2,020/2,300)*

How would you rate your overall satisfaction with your primary care physician or specialist?
(1=very poor, 10=very good)

# 3.3. Hospitalisation

As occurred in the previous survey, the medical attention received during hospitalisation was rated as outstanding (A); the percentage of respondents rating it higher than 7 increased between years, from 83% to 94% (Fig. 24).

Figure 24 Satisfaction with hospitalisation (%)



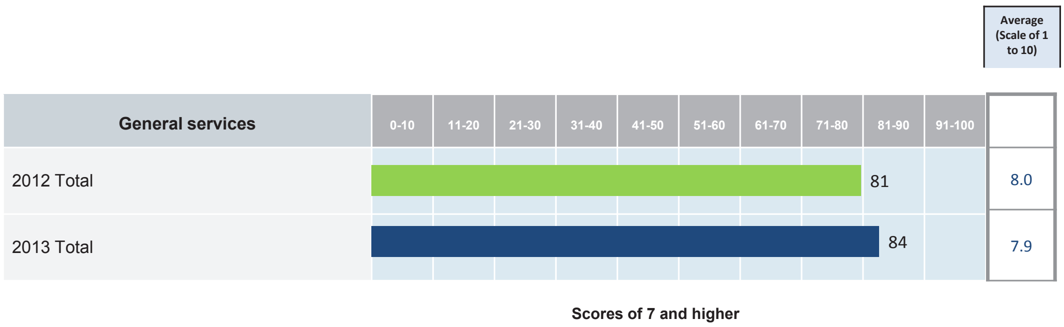

***Base:*** *Have been admitted to the hospital at least once (989/1,176)*

How would you rate your overall satisfaction with the care you received during your hospitalisation at a private centre? Please use a scale of 1 to 10, where 1 = very poor and 10 = very good.

# 3.4. Accident & Emergency

In line with the previous survey, A&E received an excellent score, and the number of respondents rating it higher than 7 increased between years (Fig. 25).

Figure 25 Satisfaction with A&E (%)



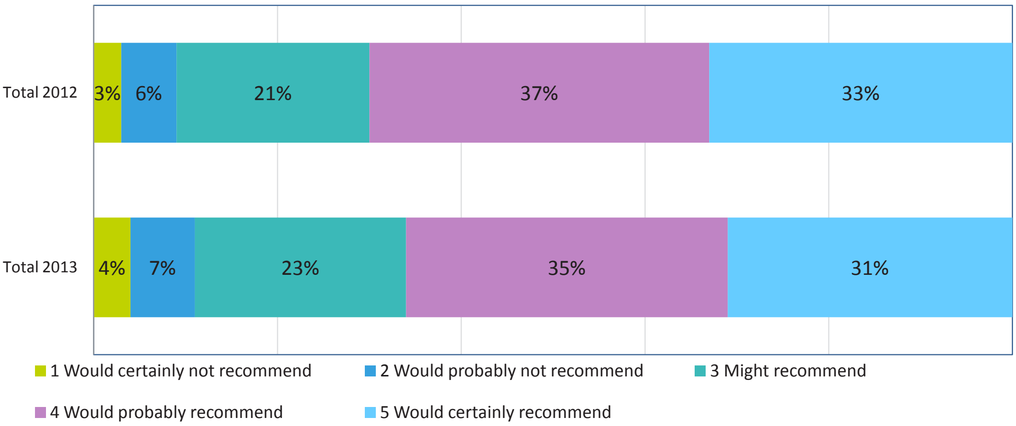

***Base:*** *Have used A&E at least once (1,235/1,336)*

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

# 3.5. Likelihood of recommendation

Similar to last year, a large percentage of users—around 90%—would recommend private healthcare to family and friends (Fig. 26).

Figure 26 Likelihood of recommending private healthcare services

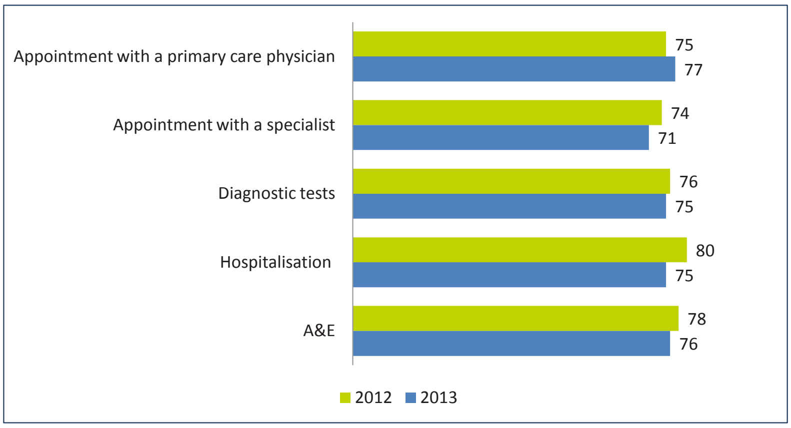



***Base:*** *Total respondents (2,556)*

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

The level of recommendation for private healthcare services is high, in line with last year: a score of 4 on a scale of 1 to 5 (Fig. 27).

Figure 27 Likelihood of recommending private healthcare




| | Average Scale 1 to 5 (2012) | Average Scale of 1 to 5 (2013) |
|---|---|---|
| Appointment with a primary care physician | 4.0 | 4.1 |
| Appointment with a specialist | 4.0 | 4.0 |
| Diagnostic tests | 4.1 | 4.0 |
| Hospitalisation | 4.1 | 4.1 |
| A&E | 4.1 | 4.1 |

***Base:*** *Have used various services*

Q.9b Which of the following private healthcare services have you used in the last year?
Q.7b How likely are you to recommend private healthcare services to a friend or relative?

# 4.
# Conclusions

The results of the Private Healthcare Industry Barometer 2013 reflect the sector's good health, despite the general situation of Spanish society and the negative perception of private healthcare caused by government plans to externalise management of part of the public healthcare system.

Patients have a particularly positive perception of the care provided, the professionalism, and the feelings of trust and reassurance conveyed by healthcare personnel, as well as the speed, agility, and extensive range of care, and information provided, all of which are viewed as hallmarks of private healthcare.

### 1. High level of satisfaction with private healthcare services.

Users of private healthcare, most of whom also use public healthcare, assign a B+ rating to the various services provided by the private system. Practically 8 out of every 10 enrollees assign private healthcare services a score of over 7 on a scale of 1 to 10.

### 2. A large percentage of users would recommend private care.

A total of 89% of users would recommend private healthcare in general, its specific services in particular, to family and friends.

### 3. The older the policy, the higher the score given to private healthcare.

Whereas respondents who have been insured for less than a year gave private healthcare services a score of 6.8 points, those who have been insured for 1-3 years gave a 7.1 score, while those have been insured for over 3 years gave a score of 7.5.

### 4. The more often people use private healthcare, the more satisfied they are with their services.

A total of 92% of enrollees have used private healthcare services at least once, and 73% have used them in the last year.

More frequent use of private healthcare increases user satisfaction levels.

Private healthcare received an average score of 6.8 points (on a scale of 1 to 10) from people who have never used it, 7.1 points from people who have used it at least once, and 7.5 points from people who have used it in the last year.

## 5. Attention provided in consulting rooms and A&E receive a B+ score, which increases to A in the case of hospitalisation.

Services provided by primary care physicians and specialists received an average score of 7.8, and A&E received a 7.9.

Hospitalisation, a service that half of the respondents have used, received an average score of 8.6 points. All aspects related to hospitalisation were perceived very positively, with average scores of over 8.0.

## 6. Private healthcare enrollees underline two major strengths of private healthcare: the quality of service and the professionalism of healthcare personnel.

Private healthcare's speed, agility, personalised treatment and flexibility were viewed as extremely positive,

and staff were perceived as very professional due to the trust and reassurance that they conveyed.

## 7. As in last year's barometer, the areas of private healthcare with the lowest scores were unrelated to health per se:

Parking (6.2), signage on the routes for getting to the clinics (6.8), proximity of hospitals/clinics (6.9) and the offer of non-health related services (6.9).

## 8. There are no significant statistical differences between the 2013 and 2012 results.

It is especially interesting that there are no major statistical differences between the 2012 and 2013 barometers, i.e. private healthcare has maintained its B+ rating and is clearly in "excellent health".

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