

Global healthcare survey reveals rise of 'patient power'

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LONDON – Leading global research firm, Synovate, today revealed the results of a global survey into attitudes and behaviour around healthcare. Among key findings, Germans are most likely to visit their doctor, Canadians are least likely to follow their doctors' orders without question, and pharmaceuticals beat 'alternative medicines' in the global popularity stakes.

Synovate surveyed 9,642 people across Brazil, Bulgaria, Canada, Germany, India, Malaysia, Netherlands, Russia, Serbia, Slovakia, Turkey and the US on all things healthcare - sources of healthcare information, frequency of visits to the doctor, use of non-pharmaceutical approaches, and more. The survey demonstrated how attitudes and behaviours toward healthcare are determined by cultural differences.

Doctor's orders

It would appear that the majority of respondents of all nationalities still rely on their doctor to make a diagnosis – with just three exceptions: India, Malaysia and Slovakia, where 62%, 56% and 52% respectively agreed with the statement. "I often come to my Doctor already prepared with a diagnosis". By contrast, more than 70% of respondents in Bulgaria and the Netherlands disagreed.

Commented Stoyan Mihaylov, Managing Director of Synovate Bulgaria:

"There are many problems with the Bulgarian healthcare system, but this finding just reconfirms the traditional authority of the 'doctor' in Bulgarian society".

Notable exceptions were the independent Canadians, 59% of whom were most likely to believe that the doctor is 'just one of several sources who influence my healthcare decisions.' Against an average of 24% for all countries surveyed, no Canadian respondents agreed with the statement that the doctor is 'a person whose directions I follow without question.'

Head of Synovate Healthcare in Canada, Otto Akkerman, explained:

"This result reflects the increasing role other healthcare providers play in how Canadians manage their health and select treatment options. Many Canadians rely on their pharmacist to explain physician recommendations. As the physician shortage continues and healthcare legislation in several provinces gives pharmacists increased authority to provide healthcare consultation and write prescriptions (and in some cases bill the government in a similar manner as doctors), we can expect this number to increase."

On average, only one in ten respondents agreed that their doctor is 'the person who simply prescribes the medication I request.'

Just ask 'Dr Google'?

However, according to the survey, at least one quarter of the respondents across the world rely on primary sources of advice other than doctors. To compound this, half the respondents overall agreed that they would only take the medication prescribed by their doctor if backed up by other research. Most passionate about this were the Malaysians at 82%.

Commented Jennifer Wong of Synovate Healthcare Malaysia,

"This is not surprising; as much as Malaysians believe in their doctors, most will seek a second opinion from other doctors, friends, relatives or colleagues before fully believing in the medication given."

After doctors, friends and family were most likely to provide the primary source of information about health. On average, eight percent of respondents turned to family and friends as their main source – this was most pronounced in Malaysia (18%), Brazil (16%) and Russia (14%). In fact, in most of the nations surveyed, respondents were more likely to ask friends and family about their health than they were to ask a pharmacist or nurse.

Next in the influence stakes was the internet. On average, five percent of respondents used it as their primary source,

driven by Slovaks (16%), the Dutch (15%) and the Americans (10%).

Commented Director, Synovate Netherlands, Reinier Heutink:

"Despite Dutch respect for General Practitioners (GPs), there are discussions currently taking place in the Netherlands in which GPs state their fear of 'Doctor Google' - that is, patients using Google as their main diagnostic tool. People do want to be prepared and informed and be sparring partners with their GPs."

However, only 18% overall agreed that they see their doctor less than they once did as they can often find out what they need to know on the internet.

For Serbians, Bulgarians, Brazilians, Germans, Indians and Turks, the pharmacist ruled over the internet. Although only three percent of respondents overall selected the pharmacist, in these countries the pharmacist was the first port of call after the doctor. Those least likely to cite the pharmacist as a primary source of information were Americans and Malaysians.

Surprisingly, nurses were cited infrequently, with a mean of only 0.7% of respondents stating they rely on the nurse as a primary source of information. US respondents were more than twice as likely, on average, to cite nurses as their primary source but it was still a small number.

Concluded Michael Spedding, CEO of Synovate Healthcare,

"These findings are consistent with our experience; as knowledge is accessed through other channels and the population becomes more informed, we may well see the influence of the doctor decline further."

Can't go, won't go...

So how often do respondents take their ailments to the doctor? Between one and three times a year, revealed the survey. Germans proved most likely to visit the doctor – for half the respondents, it was four or more times a year (with 17% popping in more than 10 times!). Explained Synovate Healthcare Germany's Manfred Eberlein, this is down to economics and the 'age pyramid':

"The population in Germany is very old compared to that of 'younger' markets such as Turkey, Malaysia and India – as we all know, there are far more health issues in later life. Also, Germany has a very good healthcare system with comprehensive insurance coverage, and doctors are actually incentivised to treat more patients."

By contrast, more than a third of respondents in Russia, Serbia and Turkey were significantly more likely to report zero doctor visits for their own health in the past year. Anton Timergaliev, Head of Synovate Healthcare Russia, commented:

"There are two factors driving this in Russia: first, the low quality of the Russian healthcare system, meaning that one must spend at least half a day visiting the physician; secondly, it is normally possible to buy some prescription drugs without a prescription. As a result, some groups - for example, antibiotics - should be considered 'over the counter' (OTC) remedies rather than prescription ones".

The doctor will see you now

Overall, a third of respondents think doctors do not make enough time for them. The nationalities most vocal on this score were Russians and Malaysians, with 57% and 55% respectively agreeing with the statement, "My doctor is too busy and does not spend enough time with each patient" - bearing out earlier comments concerning overloaded healthcare systems. By contrast, only eight percent of Dutch respondents felt similarly. Said Heutink:

"In general, the Dutch have a very critical attitude towards the healthcare sector. However, the first-line segment (General Practitioners) are generally viewed very positively and the GP population is sufficiently high to allow enough attention on each patient."

How alternative is 'alternative medicine'?

Over to actual treatment, the survey showed that pharmaceuticals easily beat 'alternative medicines' in the global popularity stakes.

A large majority (83%) of respondents had not visited any alternative medicine practitioners in the last year. Serbians retained their trend of avoiding the doctor by proving least likely to seek care from an alternative practitioner (92% have not). By contrast, although the numbers are small, Indians and Canadians were at least twice as likely to have used alternative medicine, with 12% having visited four or more times in the last year. This finding makes sense to Monica Gangwani, Head of Synovate Healthcare in India:

"India has a rich tradition of using natural / herbal products for therapeutic purposes. This can be partially explained by the high incidence of self medication and therefore the reliance on alternative medication and home remedies to take care of day-to-day health issues. The other important reason is the strong roots that Ayurveda and Ayurvedic healing has had culturally."

Keen on chemical or back to nature?

When asked whether they agreed or disagreed with the statement, "I would prefer to take natural medicine rather than drugs", respondents displayed polarised views. At least a slight majority overall were inclined to agree. The most fervent supporters were Russian respondents, with two thirds in agreement. Says Anton Timergaliev:

"When we talk about the popularity of natural medicine, it is important to remember that only a hundred years ago a large majority of the Russian population was rural (and plenty of natural remedies were close at hand). Urbanisation, although rapid, is relatively new and many traditions remain strong."

Also big advocates of alternative medicine were the Germans, despite their easy access to pharmaceutical products. Explained Manfred Eberlein:

"Germany has a long-standing tradition of using homeopathy and natural remedies. Whilst it is widely accepted here that pharmaceuticals are important for treating more serious illnesses, Germans are likely to opt for homeopathy or herbal remedies to treat smaller complaints... they are perceived as less aggressive and to offer more holistic, long-term healing. An increasing number of doctors have an extra degree of specialisation in natural medicines, and so can prescribe pharmaceuticals and advise on alternative approaches."

Paradoxically, Indians (63%), along with Turks (60%) disagreed on this score, perhaps suggesting that although non-pharmaceutical approaches are more prevalent in India, this may be due to economics and poor access to pharmaceuticals rather than choice.

When asked about scepticism towards non-pharmaceutical approaches, the US was essentially equally divided on this issue, as were Brazil, Bulgaria, and Canada.

Of the minority who stated they had used a non-pharmaceutical approach, herbal remedies and massage were the most likely to have been tried in all markets, with an average of 24% and 21% respectively. This was excepting India, where Traditional Chinese Medicine at 19.3% edged out massage and herbal remedies. In Brazil, acupuncture was comparatively popular, with 16.7% of Brazilian respondents having tried it versus a mean of 5.3%.

Curiosities

Americans are more chilled out than all the other markets surveyed... one in ten have used meditation in the past year to address a health issue, the largest use of this approach across all the markets.

Overall, people see their doctor as at least a partner in managing their health. However, Russians, Canadians and Brazilians were more likely than other respondents to see doctors as transactional, with 18% in all three markets agreeing their doctor is 'the person who simply prescribes the medication I request'.

Russians and Slovaks were least likely to cite their doctor as their main source of medical advice and far more likely than any other markets to rely on newsletters, magazines, newspaper articles and books to manage their health (20% of Slovaks and 16% of Russians primarily use these sources).