



FRANCE LOCAL MARKET REPORT

2017



THE FUTURE HEALTH INDEX IS COMMISSIONED BY PHILIPS

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II. Key Findings in Detail

General Attitudes to Health and the Healthcare System

1. The overall health of the French population is viewed positively by the general population and healthcare professionals alike, but more can be done to ensure future sustainability of the health system.

- A majority (69%) of the population at large rates their health positively (good, very good or excellent). Healthcare professionals agree with about four-in-five (77%) rating the overall health of the nation positively.
- Furthermore, most healthcare professionals (80%) rate healthcare overall in France positively (good, very good or excellent) and a similar proportion (84%) believe their patients would rate their overall experience as a patient in France as good, very good or excellent.
- Although healthcare professionals and the general population have positive perceptions of the population's health, France is ranked twenty fourth out of 188 countries on the list of healthiest countries, according to an analysis in *The Lancet*.¹ As a result, there is more room for improvement to ensure that French health system remains sustainable in the future.

2. Currently, the healthcare system appears to be meeting the needs of the French population and trust in the in the system remains high among both the general population and healthcare professionals.

- Healthcare professionals (73%) and the general population (60%) agree that the healthcare available through the health system meets their patients/ their needs. This is even higher among the patient population (65%).
 - Perceptions have risen among healthcare professionals since 2016, when only about half (53%) agreed the health system in France meets patient needs.
- Consequently, healthcare professionals (85%) and the general population (67%) alike trust the healthcare system. This trust is even higher among patients (71%), indicating that those who use the healthcare system may be more aware of its capabilities.
 - Furthermore, 42% of the general population say they trust the healthcare industry more with their personal information than other industries, such as including banks, retail, entertainment, and others.

3. Perceptions of healthcare spend among the general population and healthcare professionals alike are not aligned with actual spend.

- The general population in France feels that 24% of the government's budget should be allocated to healthcare and healthcare professionals have a similar estimate of 22%.
 - Notably, this is the largest allocation, surpassing categories like education and military.
- However, general government expenditure on health as a percentage of total government expenditure was only 15.69% in 2014, according to according to the World Health Organization, Global Health Observatory Data Repository (Expenditure on health, by country 2014).

¹ Measuring the health-related Sustainable Development Goals in 188 countries: a baseline analysis from the Global Burden of Disease Study 2015, September 21, 2016 ([http://thelancet.com/pdfs/journals/lancet/PIIS0140-6736\(16\)31467-2.pdf](http://thelancet.com/pdfs/journals/lancet/PIIS0140-6736(16)31467-2.pdf))

Prevention and Empowerment

4. According to the general population in France, the health system should invest more in prevention than “sick care”. Meanwhile, healthcare professionals are more mixed in their opinions of how the healthcare budget should be spent and where they should focus their time and resources.

- The general population believes that the largest portion of healthcare budget funds should be invested in preemptive efforts, such as medical research (18% of budget allocation) and preventive care (16% of budget allocation).
- Conversely, healthcare professionals say the largest portion of the national healthcare budget should go towards chronic care (18% of budget allocation) and acute care (17% of budget allocation).
 - Notably, French insurers generally do not offer reduced rates to customers for practicing preventive care methods (i.e. diet, exercise, etc.).
- Over half of the general population (57%) also believes that healthcare professionals should focus the majority of their time and resources on preventive care instead of treating the sick (40%). However, healthcare professionals think their time and resources should have more of an even split between prevention and treatment (49% each) when it comes to healthcare overall
 - When it comes to their own specialization, they believe there should be more focus on treatment than prevention (57% vs 41%). This could be indicative of healthcare professionals believing that the responsibility for preventive care lies elsewhere in the system.

Healthcare Professional Perspective

“There is nothing being done efficiently to fight against tobacco... we are not sufficiently raising cigarette prices to discourage people from buying them. Alcohol is sold freely and people can buy 3 bottles of vodka without being asked anything. Nothing is being done to help people take control.”

Pulmonologist, 17 years’ experience, public

“The first thing that is the most important is prevention and it’s a fight against risky factors. That means, doing all that we can to lower smoking... alcoholism, if we can fight against these two factors, there will be a major impact on French people’s health in the long-run.”

Cardiologist, 18 years’ experience, public

5. While the French population and healthcare professionals alike see a role for connected care technology in prevention, more can be done to highlight this technology’s benefits across earlier phases of the healthcare continuum such as healthy living and prevention.

- According to the French general population and those that use connected care technology, the use of connected care technology is important for improving care across the entire continuum of care. However, while over a half (61%) place importance specifically on prevention, this is one of the lowest proportions of the population across the healthcare continuum alongside overall health of the population (56%) and daily healthy living (51%).

- Healthcare professionals are aligned with these perceptions. Three-fifths (61%) say these technologies are important for prevention, about half (49%) for the overall health of the population and two-in-five (40%) for daily living.
- Additionally, when asked how frequently respondents think connected care technology is currently being used across the various stages of healthcare, only a quarter (24%) of the general population indicated prevention (always/often).
 - The highest usage of this technology is reported to be when patients are living with a serious or long-term medical condition in their own homes according to 40% of general population and 45% of connected care technology users. As a result, homecare could be a quick win for showcasing the impact of connected care technology.

	% who think connected care technology is being used often or always...	
	General Population	Connected Care Technology Users
When patients are living with a serious or long-term medical condition in their own homes	40%	45%
When patients are being treated for a medical condition	29%	36%
When patients are being diagnosed for a medical condition (e.g. screenings)	26%	35%
When patients use the health system for treatments that will prevent medical conditions from forming (e.g. vaccines, regular check-ups)	24%	31%
When patients are healthy and have no medical conditions	12%	17%

6. Financial barriers and a training shortage are some of the challenges that connected care technology has to overcome in France to enable further adoption, empowerment.

- While insurers in France generally agree that the current business model in the country encourages the use of connected care technology, only 36% of the general population in France say they have used connected care technology to track any health indicator in the past 12 months, and only 40% of healthcare professionals say they use connected care technology in their practice.
- A reason for the lack of adoption could be that the population at large thinks connected care technology would make the cost of healthcare more expensive in the long-term both to them individually (54%) and overall (53%). Healthcare professionals agree (to patients 56%; overall 59%).
 - However, the general population who are knowledgeable about connected care technology are more likely than the average citizen to think it would make healthcare less expensive to them in the long-term (19% vs 14%). In line with this, insurance professionals in France say they consider a client’s use of connected care technology to track health indicators when they are offering reduced rates.

- The general population in France would be more likely to use connected care technology if the government paid for it (33%), furthering highlight the cost associated with connected care technology use.
- In addition to reduction in cost, both the general population and healthcare professionals see training as a path to technology’s adoption with almost a quarter (22%) of the general population and a third (36%) of healthcare professionals saying that training would make them more likely to use connected care technology.

Health Space Specific Findings

7. Those with cardiology issues are more likely to trust the French health system than the general population. Additionally, this group may become advocates for integration as they are also more likely than average to see the value of it. However, currently this audience is less like to believe integration currently exists.

- Citizens with cardiology issues are more likely than the general population at large to trust the healthcare system (77% vs. 67%) and agree that the healthcare available to them meets their needs (65% vs 60%).
- Notably, this group are also more likely to think that integration will increase the quality of care they receive (57%), compared to the general population (48%) and they are more likely to believe in the importance of an integrated health system than the general population (81% vs 73%).
- However, they are also more likely than the general population to feel the health system in France is unintegrated (56% vs. 48%),

Local Market Questions – Key Findings

8. The general population placing the burden of preventing poor health more on healthcare professionals and less so on themselves.

- The general population are more likely (97%) to believe that responsibility for preventing poor health should be placed on doctors (fully/some) as opposed to the individual (93%).
 - Interestingly, about half (56%) of the general population in France feels that maintaining good health would make the cost of healthcare more expensive to them in the future.
- A majority of healthcare professionals believe patients to be indifferent or unwilling when it comes to usage of connected care technology to empower them to take better care of their health.

Responsible for preventing poor health (full/some)	General Population
Doctors	97%
Each individual	93%
Parents/Family	92%
Government (NET)	90%
Companies (e.g. the food and beverage industry)	90%
Health insurance companies	89%
Educators	86%

Employers	82%
Media	74%
Charities	70%

9. A majority of healthcare professionals believe remote access to patients' vital health data is useful.

- Healthcare professionals agree that the possibility of being able to remotely access patients' vital health data/information is useful to them (85%).
- Notably, insurance professionals say they have largely begun to incorporate remote patient monitoring and telemedicine into their pricing and offerings.

Healthcare Professional Perspective

"We want to do our work well for homecare patients but we don't have time to see all of our patients... and it's poorly paid... we are really behind in terms of homecare."

Nurse, 1 years' experience, public

"...in rural areas, access to healthcare or a doctor who can run medical exams are several kilometers away [so] everything is delayed..."

Pulmonologist, 17 years' experience, public

Other Key Findings

10. While the general population and healthcare professionals place importance on integrating the health system in France, the perceived financial tradeoff may be hindering widespread adoption and associated higher quality of care.

- A quarter (73%) of the general population and healthcare professionals (78%) think it is important for the health system to be integrated. This sentiment is higher among those in the general population who are knowledgeable about connected care technology (81%).
 - Additionally, those who are 55+ (84%) are more likely than other age groups (18-34 years and 35-54 years: 66% each) to think integration is important (somewhat or extremely).
 - Year over year, the importance of integration has also increased slightly in the eyes of the French patients (those who have visited a healthcare professional in the last three months), climbing from 72% believing that integration is important in 2016 to 76% in 2017.
- Currently, almost a half of the French population (48%) feels the health system in the country is unintegrated. Healthcare professionals agree (47%), although this number has decreased greatly since 2016 (60%).
 - This perceived lack of integration is even more prevalent among patients (52%), an increase since 2016 (42%), as well as those who use connected care technology (53%).

- A barrier to integration could be the perceived cost of an integrated health system, as the population at large thinks integration would make the cost of healthcare more expensive in the long-term, both to them (56%) and overall (56%). Healthcare professionals see the price increase impacting long-term costs more so overall (57%) than to the patient themselves (47%).
- Even so, about half (48%) of the general population thinks integration of the health system would make the quality of healthcare they receive better. Healthcare professionals are even more confident that integration would make quality better (67%).

Healthcare Professional Perspective

“It’s been a dream for a long time to have a shared medical file. To know the patient’s entire medical history, to avoid a patient from seeing 14 different people only to have the same opinion, to see which exams/scans have been done and on which date... because in some cases, they don’t give all the information.”

OBGYN, 14 years’ experience, public

“I think it would be a good thing, better communication, better exchange of information on the patients but at the price of something, the price of freedom. But this doesn’t shock me, it costs us so much money that we need to be more efficient, we need to improve efficiency.”

Cardiologist, 18 years’ experience, public

III. APPENDIX: Local Market Questions

The following are the market specific questions requested by France.

General Population

FRA 1. [ASK IF COUNTRY10=FRANCE] How much responsibility does each of the following have for preventing poor health?

Please select one for each row.

[RANDOMIZE A-K]	No responsibility	Some responsibility	Full responsibility
a. Each individual			
b. National government (e.g. Central government)			
c. Local government (e.g., commune, department or region)			
d. Educators (e.g., education system, schools, university, etc.)			
e. Parents/Family			
f. Companies (e.g. the food & beverage industry)			
g. Employers			
h. Doctors			
i. Media			
j. Charities (e.g. Non-profit organizations)			
k. Health insurance companies			

FRA 2. [ASK IF COUNTRY10=FRANCE] How interested would you be, if at all, in using the following connected care technology to help you in managing your health?

Please select one for each row.

[RANDOMIZE A-H]	Not at all interested	Somewhat interested	Very interested
a. A smart watch			
b. An activity tracker			
c. A smartphone app			
d. A connected thermometer			
e. A connected toothbrush			
f. A connected body weight scale			
g. A blood pressure monitor			
h. A connected air purifier			

FRA 3. [ASK IF COUNTRY10=FRANCE] What kind of impact, if any, would maintaining good health have on the cost of healthcare to you in the future?
Please select one.

- a. Much more expensive
- b. Somewhat more expensive
- c. Have no impact on cost
- d. Somewhat less expensive
- e. Much less expensive

Healthcare Professionals

FRA 1. [ASK IF COUNTRY10=FRANCE] How much do you agree or disagree with the following statement:
As a healthcare professional, the possibility of being able to remotely access patients’ vital health data/information is useful to me.

- a. Strongly disagree
- b. Disagree
- c. Neither agree nor disagree
- d. Agree
- e. Strongly agree

FRA 2. [ASK IF COUNTRY10=FRANCE] How willing or unwilling would you say individuals are in general to use connected care technology to empower them to take better care of their health?

- a. Strongly unwilling
- b. Somewhat unwilling
- c. Neither willing nor unwilling
- d. Somewhat willing
- e. Strongly willing

FRA 3. [ASK IF COUNTRY10=FRANCE] How frequently, if at all, would you recommend your patients to use connected care technology in the following situations? [RANDOMIZE]

	Never	Sometimes	Often	Always
a. When patients are healthy and have no medical conditions				
b. When patients are trying to prevent medical conditions occurring				
c. When patients are being diagnosed for a medical condition (e.g. screenings)				
d. When patients are being treated for a medical condition				
e. When patients are living with a serious or long-term medical condition in their own homes				

IV. APPENDIX: France Methodology Information

Qualitative Interviews with Healthcare Professionals (HCPs)

To provide color and context around the quantitative data, the quantitative survey was supplemented with the following 30-45 minute in-depth interviews conducted in partnership with Schlesinger from January 24-February 17, 2017. The following audiences were interviewed in-person or over the phone:

Audience	# of Interviews Conducted
Healthcare Professionals	10 in France

Quantitative Survey (Healthcare Professionals and General Population)

In partnership with IPSOS, an independent global market research firm, a survey was fielded from January 18, 2017 to March 3, 2017 in 19 countries (Argentina, Australia, Brazil, Canada, China, France, Germany, Italy, The Netherlands, Russia, Saudi Arabia, Singapore, South Korea, South Africa, Spain, Sweden, U.A.E., U.K. and U.S.) in their native language. The survey had an average length of 25-30 minutes.

Below is the specific sample size, and interviewing methodology used in France.

	Gen Pop			Healthcare Professionals		
	Unweighted Sample Size (N=)	Margin of Error (at 95% confidence level)	Interview Methodology	Unweighted Sample Size (N=)	Estimated Margin of Error* (at 95% confidence level)	Interview Methodology
France	1,473	+/- 2.55%	Online	200	+/- 6.93%	Online

**Estimated Margin of Error is the margin of error that would be associated with a sample of this size for the full of healthcare professional population in each market.*

Local Market General Population Weighting

For the patient sample, France was weighted to be representative of the national population based on census statistics for key demographics (including age, gender, social grade, neighborhood, income and region). The weighting was applied to ensure the sample is representative of individuals age 18+ in each country who have visited a healthcare practitioner within the past 3 months.

Total Country Weighting (Healthcare Professionals and General Population)

The 19-country total is an average calculation with each country's sample size weighted to have the same value to ensure each country has an equal weight in this total. The same was done for all regional totals.

V. APPENDIX: France Demographic Profiles

General Population Demographics

- Age

France	Total
Total (N)	1473
18-25	10%
26-29	7%
30-34	9%
35-39	12%
40-44	7%
45-49	8%
50-54	8%
55-64	18%
65+	21%

- Gender

France	Total
Total (N)	1473
Male	48%
Female	52%

- Social Grade (SEL)

France	Total
Total (N)	1473
CSP-	31%
CSP+	32%
INACTIVE	36%

- Region

France	Total
Total (N)	1473
Région Parisienne	18%
North-West (Nord-Ouest)	23%
North-East (Nord-Est)	22%
South-West (Sud-Ouest)	11%
South-East (Sud-Est)	25%

- Medical Conditions (Have Currently or Have Ever Had)

France	Total
Total (N)	1473
ALS (Lou Gehrig's Disease)	<1%
Alzheimer's disease/other dementias	<1%
Anxiety	18%
Arrhythmia	2%
Artery Disease	1%
Asthma	9%
Cancer of any kind	4%
Chronic Bronchitis	4%
Chronic Obstructive Pulmonary Disease	2%
Cystic Fibrosis	<1%
Depression	13%

Diabetes (Type 1)	2%
Diabetes (Type 2)	3%
Eating Disorder	4%
Emphysema	1%
Fertility issues	2%
Gynecological Issues	10%
Heart Murmurs	3%
Heart valve issues	1%
High blood pressure	16%
High Cholesterol	7%
Kidney Disease	2%
Obesity	7%
Oral Disease	11%
Osteoporosis	3%
Rheumatoid Arthritis	2%
Sleep Apnea	5%
Stroke	1%
Other medical conditions	10%
None of the above	39%

- Income (monthly)

France	Total
Total (N)	1473
Below 500 Euro	2%
500 to 999 Euro	5%
1.000 to 1.499 Euro	13%
1.500 to 1.999 Euro	13%
2.000 to 2.499 Euro	13%
2.500 to 2.999 Euro	12%
3.000 to 3.499 Euro	11%
3.500 to 3.999 Euro	8%
4.000 to 4.499 Euro	7%

4.500 Euro or more	10%
Prefer not to answer	8%

- Education Level

France	Total
Total (N)	1473
Aucun diplôme ou CEP	2%
Brevet (16 ans)	3%
CAP, BEP ou equivalent	13%
Bac, Brevet prof. ou equivalent	24%
Bac + 2	26%
Diplome supplémentaire	31%
Prefer not to answer	1%

- Number of Children Under 18 Living in Household

France	Total
Total (N)	1473
0	67%
1	16%
2	12%
3	3%
4	<1%
5	<1%

- Type of Health Plan or Coverage

France	Total
Total (N)	1473
National Health Service	85%
Private insurance plan	10%
None	3%
Other	2%

Healthcare Professional Population Demographics

- Gender

France		Total
Total (N)		200
Male		77%
Female		23%

- Region

France		Total
Total (N)		200
Région Parisienne		21%
North-West (Nord-Ouest)		14%
North-East (Nord-Est)		23%
South-West (Sud-Ouest)		11%
South-East (Sud-Est)		31%

- Type of Healthcare Professional

France		Total
Total (N)		200
Doctor		87%
Nurse		5%
Surgeon		3%
Radiologist		2%
Nurse Practitioner		1%
Registered Nurse (RN)		<1%
Licensed Practical Nurse (LPN)		n/a
Physician Assistant		n/a
Epidemiologist		n/a
Healthcare Administrator		n/a
Diagnostic lab technician (e.g. MRI, Sonograms, etc.)		n/a
Other		n/a

- Healthcare Professional Specialization

France		Total
	Total (N)	200
	Adolescent Medicine	3%
	Anesthesiology	n/a
	Cardiology	11%
	Critical Care Medicine	2%
	Dermatology	1%
	Emergency medicine	6%
	Family medicine	46%
	Gastroenterology	3%
	General Practitioner	17%
	Geriatrics	3%
	Hospital Medicine	5%
	Internal Medicine	7%
	Neo-natal medicine	n/a
	Neurology	1%
	Obstetrics/Gynecology	6%
	Oncology	10%
	Ophthalmology	1%
	Orthopedics	4%
	Pediatrics	4%
	Preventive Medicine	5%
	Psychiatry	2%
	Pulmonology	5%
	Radiology	3%
	Reproductive Endocrinology	<1%
	Urology	1%
	Other	4%

- Number of Years in Health Field

France		Total
	Total (N)	200
	<10 years	4%
	10-19 years	27%
	20-29 years	42%
	30+ years	27%