

Doctor's voice survey

Main challenges of the medical practice in
LATAM



Doctor's voice survey – Data sheet



METHODOLOGY

Initial qualitative stage to identify main descriptors, professional challenges and patient's barriers (BLOG FINE PANEL & CROWD SOURCING).

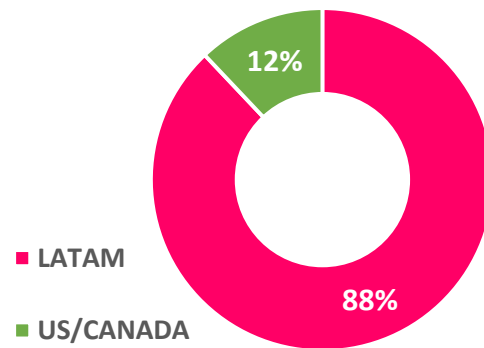
Main stage conducted through an on line survey inviting doctors registered in health care panels, both in LATAM (FINE PANEL) and United States/Canada (RECKNER HEALTHCARE)

As incentive it was offered a donation to Haiti through Save The Children and access to survey results.

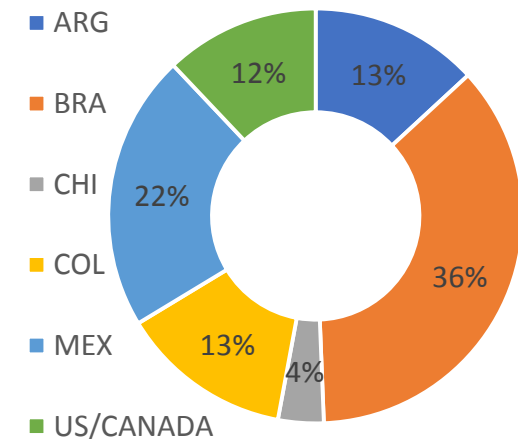
INCLUSION CRITERIA

General practitioners and specialists, all resident of Argentina, Brazil, Chile, Colombia, Mexico, United States and Canada.

SAMPLE



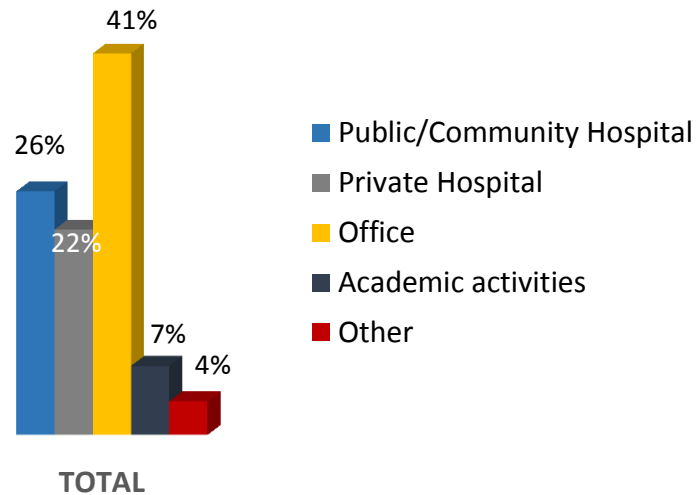
	n
Total	2.870
LATAM	2.524
US/CAN	312/34
ARG	377
BRA	1.040
CHI	102
COL	385
MEX	620





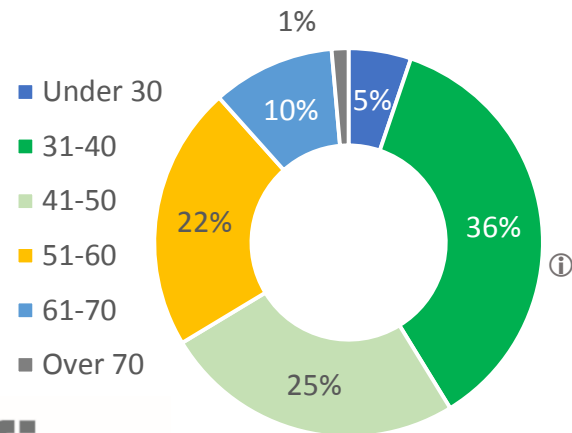
Doctor's voice survey – Respondents profile

Medical practice by country



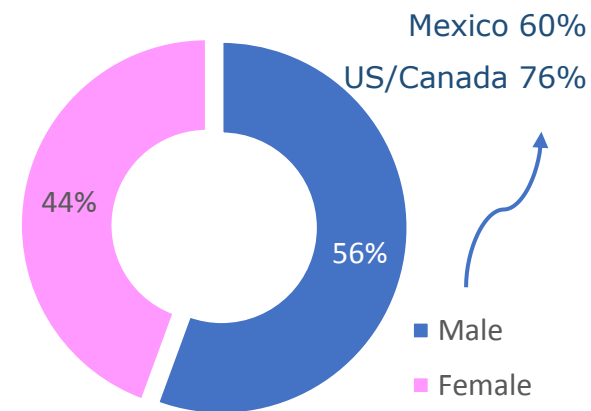
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médicos

Age groups



Age average was around 40 in most countries, with the exception of United States/Canada where HCPs were older in average (54 years old)

Gender





Doctor's voice survey

How do doctors feel in America?

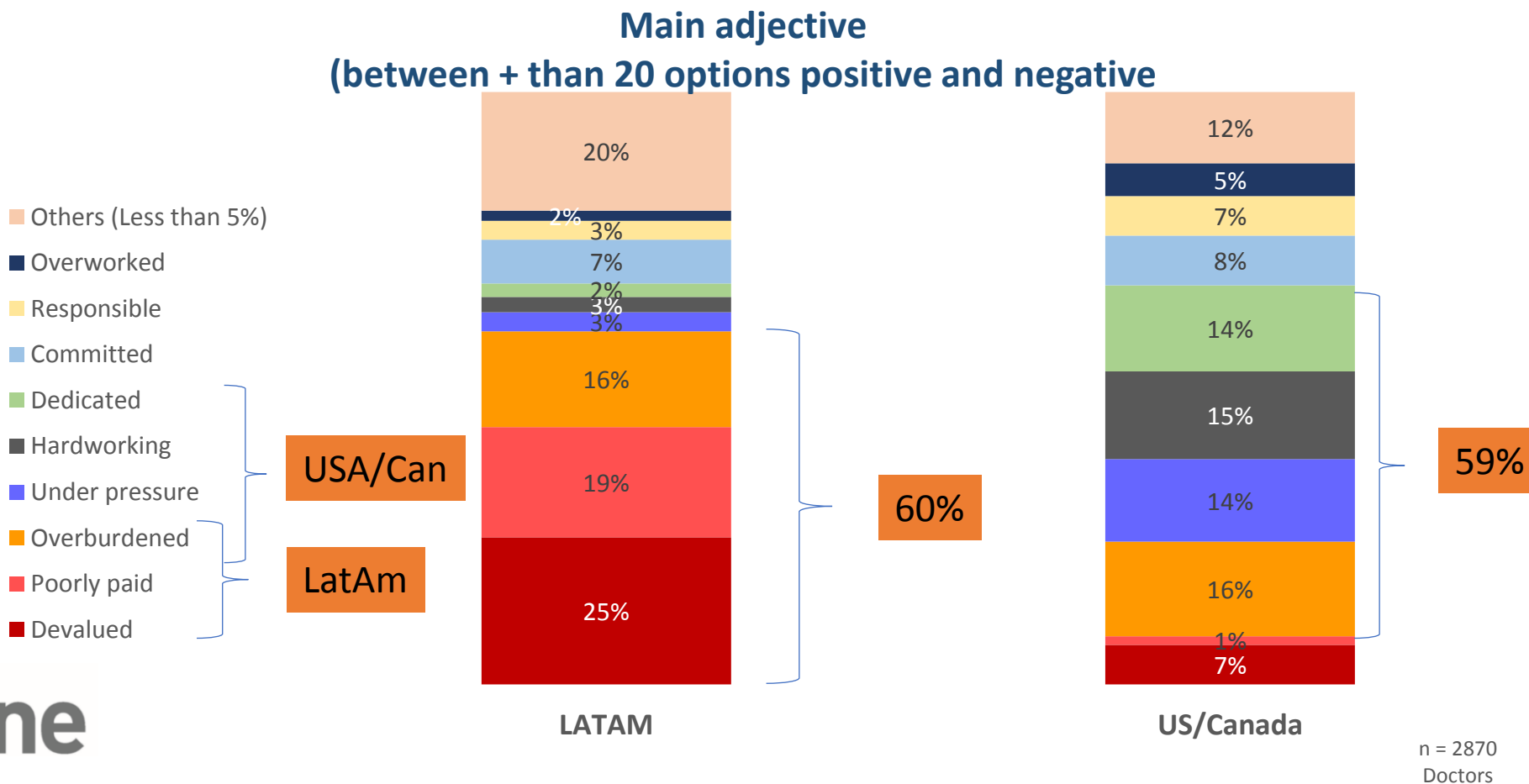
- Devalued
- Poorly paid
- Overburdened



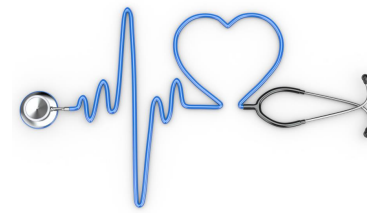


Doctor's voice survey – Self-description

- ① Doctors in **LATAM** mainly feel **devalued, poorly paid and overburdened**.
- ① By contrast, in **US/Canada** despite the fact they also define themselves as **overburdened** and even **under pressure**, they showed a much more positive self-perception than their Southern colleagues emphasizing **hardworking and dedication**.

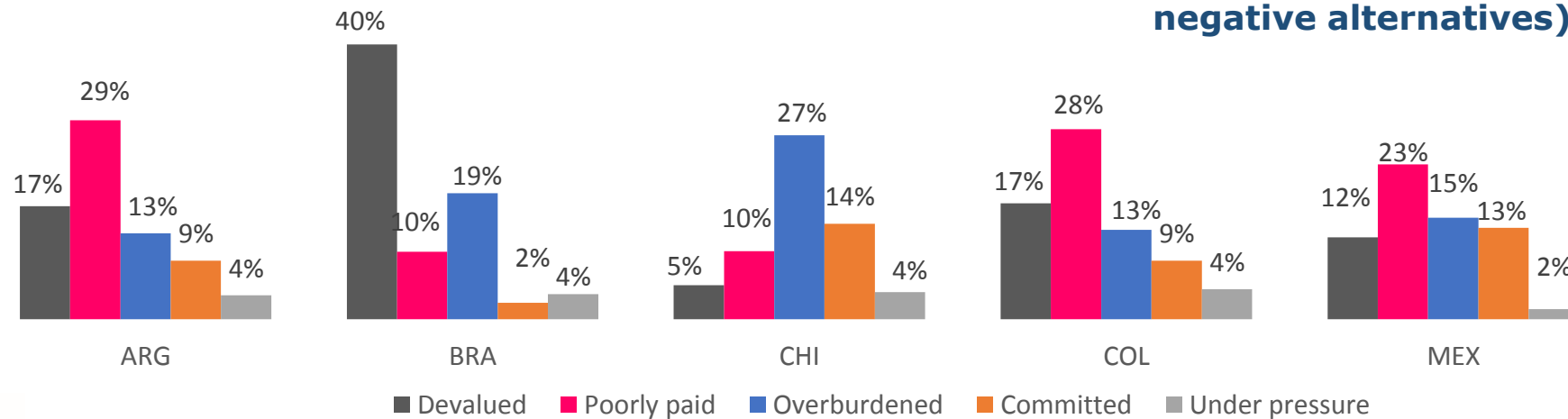


Doctor's voice survey – Self-description by country - LatAm



- ① Brazilian doctors feel mainly “devalued”
- ① **In Argentina, Colombia and Mexico feel mostly “poorly paid”**
- ① Doctors in **Chile** are the closest in LatAm to the self-definition of their North American colleagues

Main adjective (among over 20 positive and negative alternatives)



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Doctors

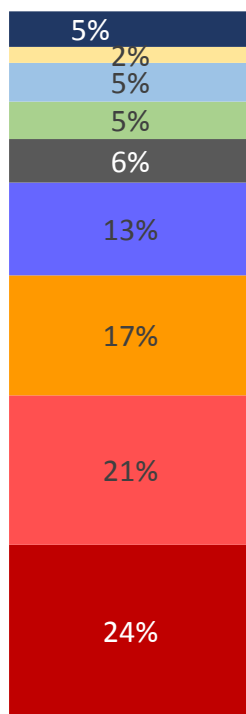




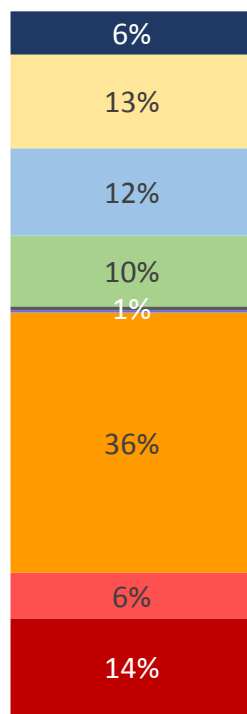
Doctor's voice survey – Main challenges

- ① There is a perception that the medical profession has lost its former high esteem from society. This happens across all regions though seems more critical in **LATAM**.
- ① This region stands out by its **low salaries and lack of materials**.
- ① In **US/Canada** physicians feel overburdened/subject to a heavy workload as their main professional challenges.

Main Challenges



LATAM



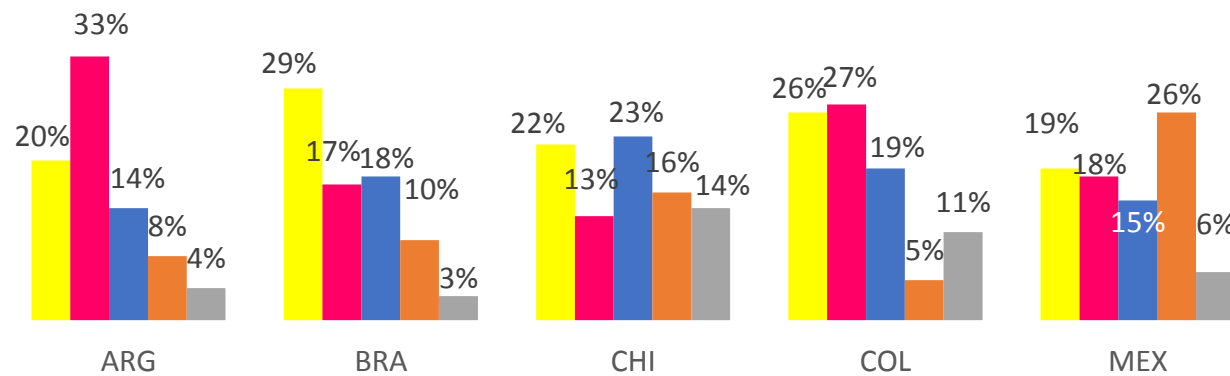
US/Canada

- Others (Less than 5%)
- Maintaining an office is very difficult
- Physicians are under great pressure to reduce patient's visit time
- Health insurers pay little
- Many professionals are poorly qualified
- There is a lack of materials and drugs in the workplaces
- Physicians are under pressure with a heavy workload
- Physicians' remunerations are very low
- The medical profession has lost the respect from society that characterized it

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Doctors



Doctor's voice survey – Main challenges



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Doctors



Doctor's voice survey

How are the national healthcare systems assessed in Latin America?

- **In general terms, doctors think that the region does not have an adequate health care system.**
- **Public hospitals are poorly valued**
- **Private clinics and hospitals, and healthcare professionals are rated more positively.**

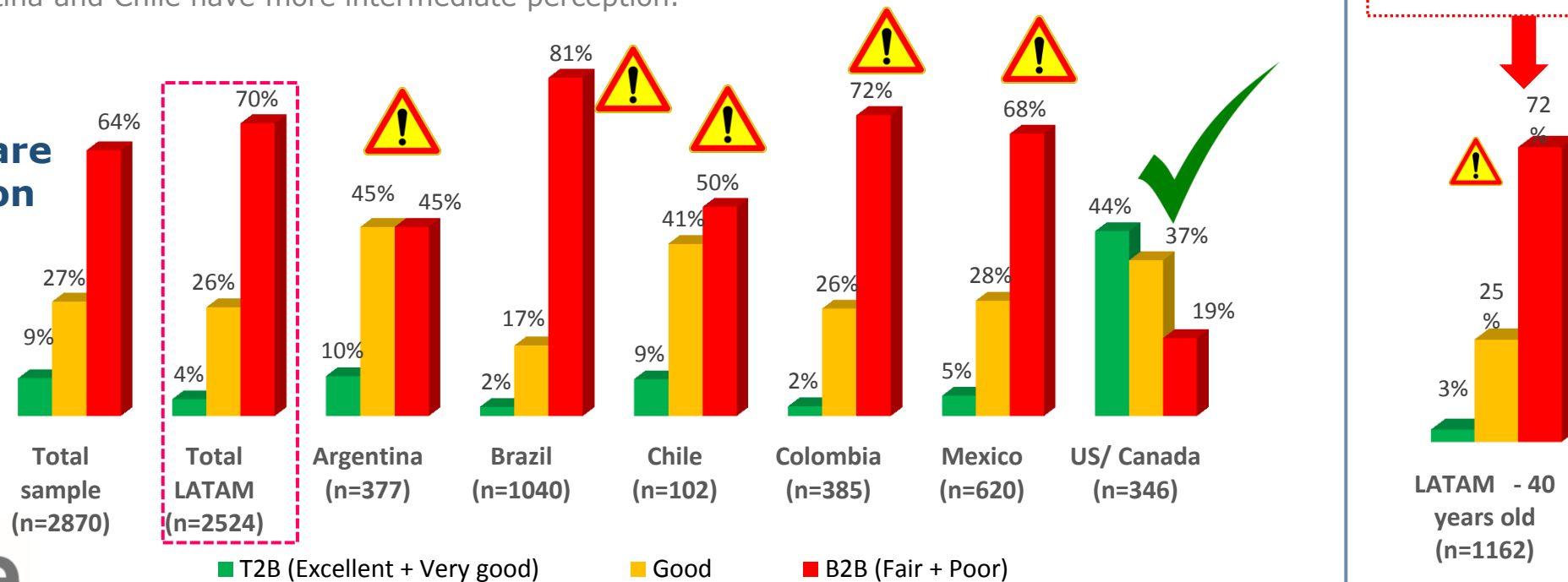
Doctor's voice survey – Patients & healthcare evaluation



- Doctors in **US/Canada** have a good perception of their countries healthcare systems, while in LATAM 70% of doctors define the same as fair or bad.
- Brazil, followed by Colombia and Mexico are the countries that have the most negative perception of their systems
- Argentina and Chile have more intermediate perception.

In **LATAM** doctors **younger than 40 years old** have significantly the more quantity of negative opinions.

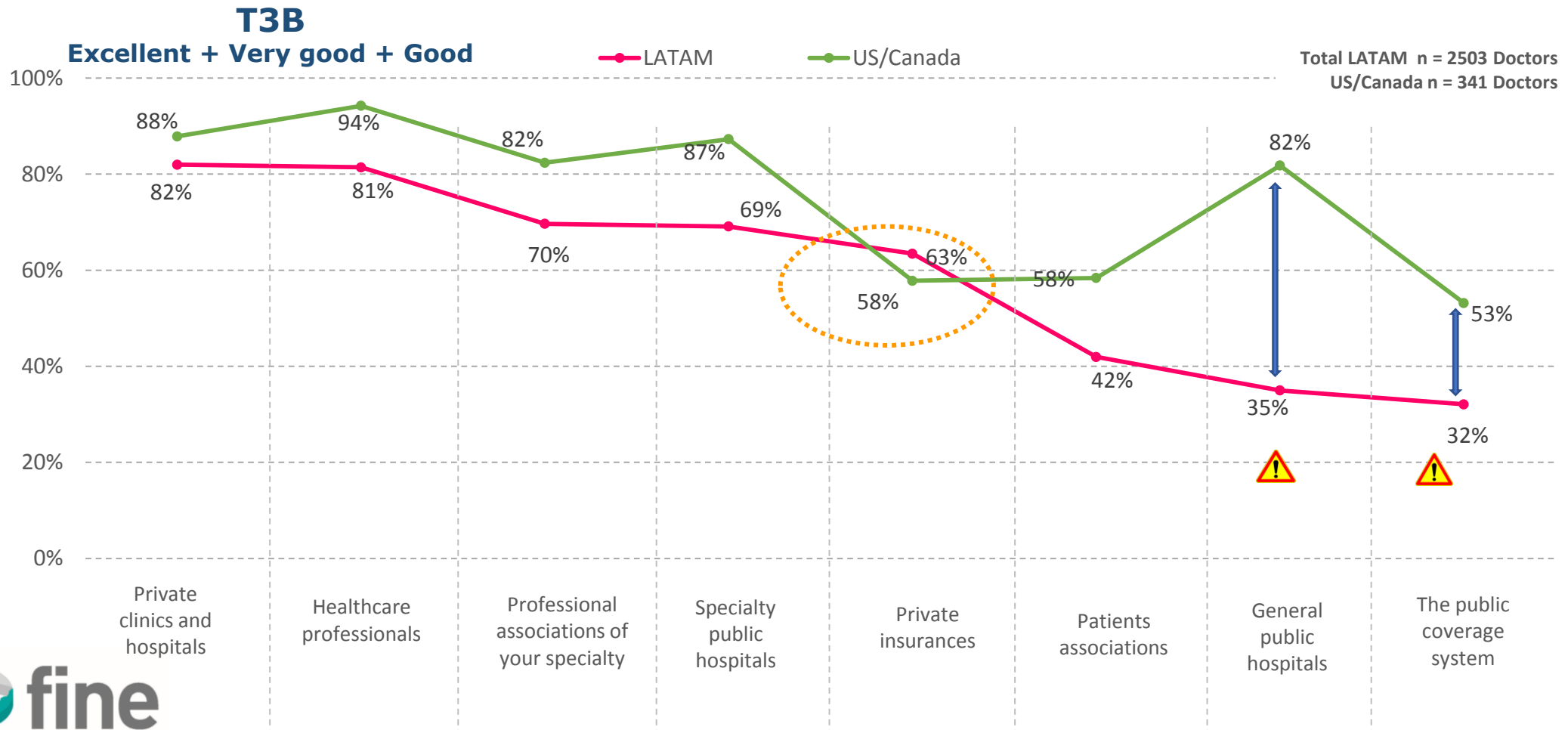
Overall care evaluation



Doctor's voice survey –Care evaluation by institution



- ① In **US/Canada** the **healthcare public system** enjoys excellent reputation.
- ① However, in **LATAM** the **private insurances** are perceived to be of higher quality than in US/Canada as defined by their HCPs.

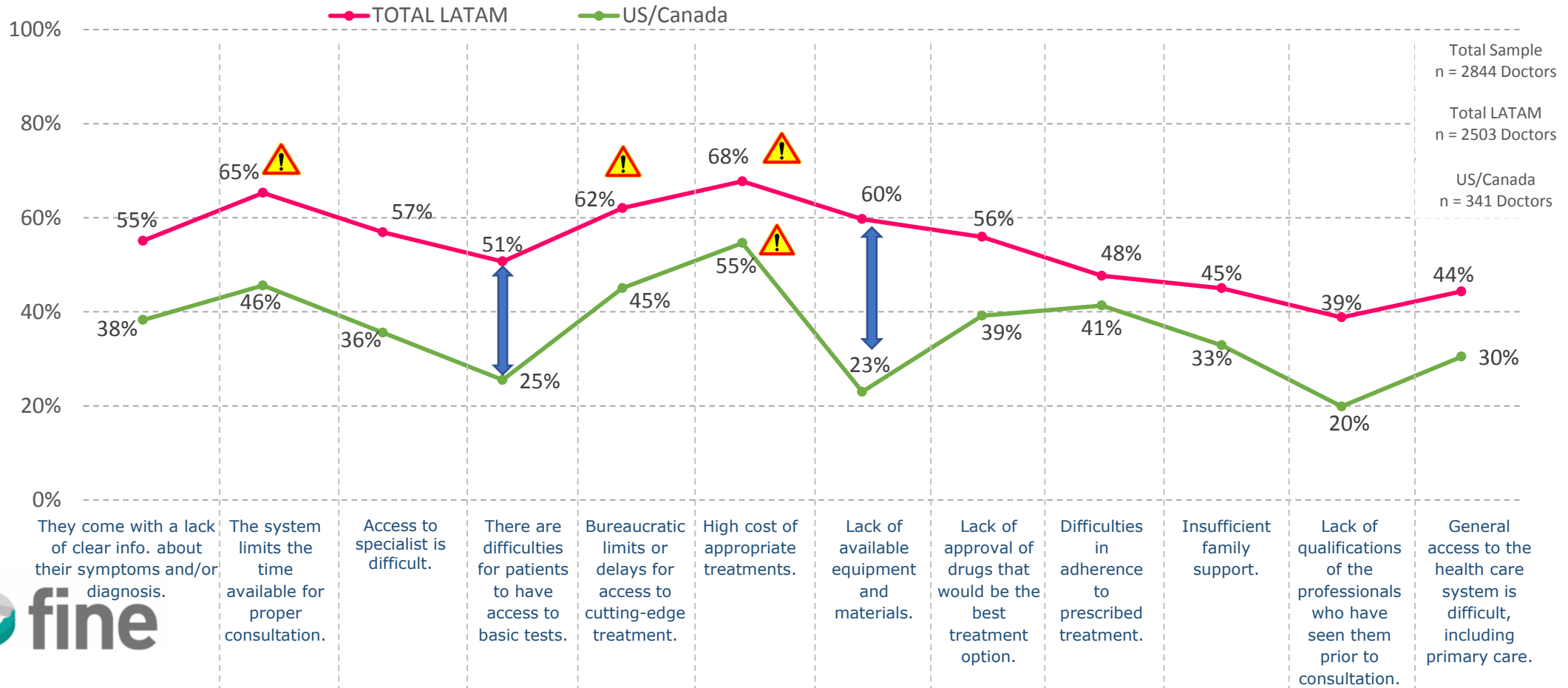


Doctor's voice survey – Patients affected by obstacles



① The **obstacles that affect patients** are:

- ① In the first place: **High cost** of treatments.
- ① Secondly: **Limited time for consultation.**
- ① Thirdly: **Bureaucratic delays** for access to cutting-edge treatment.
- ① The issues mentioned are common obstacles for the Region. Access to primary care and lack of materials is what stands out about Latin America compared to US/Canada.



P3. Could you help us estimate, based on your knowledge, WHAT % OF YOUR PATIENTS you believe may be affected by this obstacle preventing them access to better treatment?

August 2017



LATAM – Obstacles coverage and severity

Most severe considered problems	Less severe considered problems
Bureaucratic limits or delays for access to cutting-edge treatment.	They come with a lack of clear information about their symptoms and/or diagnosis.
High cost of appropriate treatments.	Difficulties in adherence to prescribed treatment.
Lack of approval of drugs that would be the best treatment option.	Lack of qualifications of the professionals who have seen them prior to consultation.
Lack of available equipment and materials.	Insufficient family support.
Access to specialist is difficult.	There are difficulties for patients to have access to basic tests.
The system limits the time available for proper consultation.	
General access to the health care system is difficult, including primary care.	



More than half of the patients

Less than a half of patients



Findings – Professional practice evaluation

- LATAM medical professionals reflects poor appreciation of their collective general situation. **They feel poorly paid, overburden and devalued.**
- An additional challenge to a system that they feel overburdens them without valuing or paid properly them is a **lack of available equipment and materials.**
- The contrast, is more visibly with their North colleagues that:
 - Although they perceive themselves in a demand environment.
 - But neither poorly paid nor lack of basic materials appear as a relevant problems.
 - **Other positive values are highlighted to define the activity such dedication and effort.**



Findings – Healthcare system evaluation

- This contrast between both Americas is reflected in their completely different perception of healthcare system.
- **In US/Canada is globally perceived as very good**, while by most of its HCPs in Latin America is seen as fair or bad.
- Healthcare professionals are specially hard critics of their systems in Brazil, Colombia and Mexico, while Argentina and Chile shown a more moderate perception.
- Maybe the above is an expected result but what is more **unexpected** is that the main difference between both systems is not the **quality of the attention in clinics and private insurance** (where in fact the general quality perception is similar and relatively positive) but in **the public system quality and public hospitals particularly**.



Findings – Obstacles for patients

- Obstacles faced by patients to get better treatment are similar along the continent (although in all cases patients in Latam are the most affected proportionally)
- **The high cost of medicines is the number one problem in South and North of the Region.**
- **Two specific Latin America's obstacles are lack of available equipment and materials and difficulties to have access to basic tests.**



Findings – Obstacles for patients

To prioritize obstacles, we shall put first those perceived as most severe and also affecting a larger number of patients.

According to doctors this would short list to :

- **The difficulties for patients to have access to medicines due to high costs or Bureaucratic access barriers.**
- **Lack of approval of drugs** that would be the best treatment option.
- **Lack of available equipment and materials.**
- **The inappropriate attention due to limited time available for proper consultation and difficult access to specialist.**

Doctor's voice survey



Diego Casaravilla

August 2017