



Paris, May 30th, 2008

Health Assessment of the public health care systems and life habits of the big western nations' populations

A **Harris Interactive** exclusive poll, in partnership with the channel of international information France 24 and the *International Herald Tribune*

The latest **Harris Interactive / France 24 / International Herald Tribune** poll shows that adults in the 5 biggest European countries and the United States have a rather negative view of the health care systems in their countries, with the United States being particularly negative.

In other respects, the poll shows significant differences between countries on behaviours related to health and wellness.

Results to be released on May 30th 2008 on France 24's "The Talk of Paris" and published in the *International Herald Tribune* of May, 30th 2008.

Methodology

The latest poll was conducted online by Harris Interactive, in partnership with France 24 and The International Herald Tribune, among a total of 6,735 adults (aged 16-64) within France, Germany, Great Britain, Spain and the United-States; and adults (aged 18-64) in Italy, from 30th April to 14th May 2008. The data were weighted, where necessary, by age, gender, education, region and Internet usage to make it representative of the general population profile for each country. Propensity score weighting was applied to adjust for respondents' propensity to be online.

The poll explores a variety of issues, including:

- Overall situation of the health systems
- Situation of the standards and costs in the health systems
- Maintain or improve its health/wellness: behaviours?
- Health/wellness products consumption
- Availability of the health products: with or without prescription?

Please note that any communication of these results has to be made with technical elements such as: survey methodology, fieldwork dates, name of the agency, sample size.

OVERALL SITUATION OF THE HEALTH SYSTEMS

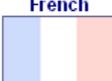
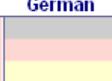
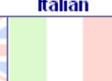
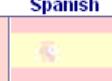
At least a plurality of Europeans and Americans admit that there are believe that while there are some good things in the Healthcare system of their country, fundamental changes are necessary to make it work better (from 43% in France to 61% in Italy and Spain).

Europeans are less critical than Americans on the way their Healthcare system works: 33% of Americans think that their Healthcare system needs to be totally rebuilt compared to only 13% of Spaniards or 15% of Britons.

Among Europeans, the French seem to be the most satisfied or at least less inclined to raise questions about their Healthcare system since 38% of them consider that the French Healthcare system works well and only needs minor changes.

Which of the following statements comes closest to expressing your overall view of your country's health care system?

Base : All respondents

| |  |  |  |  |  |  |
|---|---|---|--|---|---|---|
| <i>Unweighted Base</i> | 1,288 | 1,106 | 1,088 | 1,087 | 1,120 | 1,046 |
| On the whole, the health care system works pretty well and only <u>minor changes</u> are necessary to make it work better | 38% | 19% | 16% | 20% | 24% | 12% |
| There are some good things in our health care system, but <u>fundamental changes</u> are needed to make it work better | 43% | 54% | 60% | 61% | 61% | 50% |
| The health care system has so much wrong with it that we need to <u>completely rebuild it</u> | 16% | 23% | 15% | 18% | 13% | 33% |
| Not sure | 3% | 4% | 8% | 1% | 2% | 5% |

* : less than 0,5%

SITUATION OF THE STANDARDS AND COSTS IN THE HEALTH SYSTEMS

This criticism of the public Healthcare system is more obvious when the evolution of **standards of care and treatment** and their costs is questioned. For instance, the majority of Europeans as well as Americans believe that standards of care and treatment are moving in the wrong direction.

This is especially true in Germany where 80% of Germans think that the **standards** are declining.

With regard to the costs of care and treatment, Americans are most likely to agree that costs are rising too fast (89%) closely followed by Germans (86%).

A majority of French adults (55%) as well as just under half of Spaniards (48%) agree that standards and costs in the public health care system corresponds to their **needs and expectations**. For the other countries, the dissatisfaction is strong, especially in Germany (72%), Italy (67%) and the United-States (62%).

Thinking of the evolution of the health care system in your country in the past few years and its current situation, to what extent do you agree or disagree with the following statements?

Base : All respondents

| Summary | French | German | British | Italian | Spanish | American |
|---|--------|--------|---------|---------|---------|----------|
| <i>Unweighted Base</i> | 1,288 | 1,106 | 1,088 | 1,087 | 1,120 | 1,046 |
| Standards of care and treatment in the public health care system are declining | | | | | | |
| Agree (<i>Strongly agree + More agree than disagree</i>) | 74% | 80% | 68% | 62% | 57% | 64% |
| Disagree (<i>Strongly disagree + More disagree than agree</i>) | 21% | 12% | 22% | 34% | 37% | 25% |
| Mean | 3,1 | 3,3 | 3 | 2,9 | 2,8 | 3 |
| Not sure | 5% | 8% | 10% | 4% | 5% | 11% |
| Costs of care and treatment in the public health care system are rising too fast | | | | | | |
| Agree (<i>Strongly agree + More agree than disagree</i>) | 81% | 86% | 75% | 76% | 58% | 89% |
| Disagree (<i>Strongly disagree + More disagree than agree</i>) | 13% | 8% | 11% | 20% | 29% | 5% |
| Mean | 3,2 | 3,6 | 3,3 | 3,2 | 2,8 | 3,7 |
| Not sure | 6% | 6% | 14% | 5% | 13% | 6% |
| Standards and costs in the public health care system correspond to my needs/expectations | | | | | | |
| Agree (<i>Strongly agree + More agree than disagree</i>) | 55% | 24% | 38% | 28% | 48% | 26% |
| Disagree (<i>Strongly disagree + More disagree than agree</i>) | 40% | 72% | 42% | 67% | 43% | 62% |
| Mean | 2,6 | 1,9 | 2,4 | 2 | 2,5 | 2 |
| Not sure | 4% | 4% | 20% | 6% | 9% | 12% |

Scale used for mean calculation: "Strongly agree" = 4 / "More agree than disagree" = 3 / "More disagree than agree" = 2 / "Strongly disagree" = 1

* : less than 0,5%

MAINTAIN OR IMPROVE ITS HEALTH/WELNESS: BEHAVIOURS?

Generally speaking, the maintenance or the improvement of their health is something both Europeans and Americans are doing. Almost all of them (between 92% and 97%) claim to be currently doing something to improve or maintain their health and/or wellness.

There is a large variety of behaviours within each of the countries that people are currently doing.

Which of the following are you currently doing to improve or maintain your health/wellness?

Base : All respondents

| | French | German | British | Italian | Spanish | American |
|--|------------|------------|------------|------------|------------|----------|
| <i>Unweighted Base</i> | 1,288 | 1,106 | 1,088 | 1,087 | 1,120 | 1,046 |
| Drinking more water | 59% | 62% | 55% | 64% | 72% | 71% |
| Eating more fruits and vegetables than before | 65% | 55% | 59% | 58% | 59% | 63% |
| Watching your weight | 62% | 55% | 48% | 53% | 52% | 60% |
| Consuming more fresh products | 34% | 51% | 54% | 44% | 52% | 55% |
| Limiting sweet products, including the addition of sugar | 54% | 40% | 41% | 44% | 46% | 48% |
| Consuming less food in restaurants or fast-food stores | 41% | 36% | 37% | 36% | 39% | 53% |
| Limiting salty products, including the addition of salt | 47% | 19% | 46% | 34% | 37% | 38% |
| Reducing or eliminating alcohol consumption | 25% | 37% | 29% | 44% | 49% | 27% |
| Limiting the quantity of food during meals | 38% | 34% | 27% | 39% | 28% | 44% |
| Exercising at least 30 minutes each day | 42% | 27% | 31% | 26% | 37% | 41% |
| Not snacking between meals | 62% | 15% | 34% | 30% | 29% | 23% |
| Reducing or eliminating smoking | 25% | 35% | 19% | 24% | 51% | 25% |
| Cooking more | 30% | 38% | 34% | 12% | 26% | 39% |
| Consuming foods having health benefits (immune systems, contributions in minerals, in vitamins, limiting the cholesterol, strengthening bones) | 25% | 24% | 25% | 25% | 30% | 46% |
| Choosing food according to their nutrition label (the nutritional information or ingredients on packaging) | 32% | 20% | 25% | 20% | 14% | 41% |
| Participating in activities that reduce stress, like yoga | 6% | 10% | 9% | 8% | 8% | 16% |
| Other | 5% | 3% | 1% | 5% | 6% | 5% |
| Average number of "behaviours" | 6,5 | 5,6 | 5,7 | 5,7 | 6,4 | 7 |
| None | 3% | 8% | 8% | 7% | 5% | 5% |

Particularly nutrition behaviours seem to rise to the top such as: "Drinking more water" (72% of Spanish and 71% of Americans) and "Eating more fruits and vegetables than before" (65% of French).

Reducing or eliminating alcohol and smoking also seems to be something Europeans and Americans are doing. This is especially true for the Spanish as a majority (51%) is currently reducing/eliminating smoking and 49% say they are reducing/eliminating alcohol).

In France, some behaviours are significantly higher than in other countries. This is the case for behaviours such as "Not snacking between meals" (62%), "Limiting sweet products" (54%), "Limiting salty products" (47%).

Moreover, a strong trend appears regarding the use of food products having health benefits (nutraceutical): almost half of Americans (46%) and one quarter of Europeans (between 24% and 30%) say they are consuming nutraceutical to improve or maintain their health.

Finally, Americans (41%) and French (32%) are most likely to choose food based on the nutritional information or ingredients.

* : less than 0,5%

HEALTH/WELNESS PRODUCTS CONSUMPTION

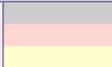
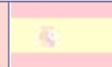
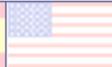
Europeans and particularly Britons seem to be rather moderate consumers of health/wellness products. 42% of Britons say they do not use -even occasionally- these kinds of products.

The main health/wellness products used are vitamins and trace elements (from 19% of Spanish to 34% of Britons and Germans), while, Americans are most likely to use these products (59%).

In the United States, the consumption habits could be related to the ease of access to these products as well as more intensive promotion of them among the General Public.

Which of the following health/wellness products do you use or consume on at least an occasional basis?

Base : All respondents

| |  |  |  |  |  |  |
|--|---|---|--|---|---|---|
| <i>Unweighted Base</i> | 1,288 | 1,106 | 1,088 | 1,087 | 1,120 | 1,046 |
| Vitamins and/or trace elements | 28% | 34% | 34% | 20% | 19% | 59% |
| Products for oral health | 17% | 23% | 15% | 20% | 37% | 26% |
| Aspartame (false sugar) or products with aspartame | 25% | 14% | 10% | 13% | 15% | 23% |
| Medicines for digestive disorders | 16% | 3% | 12% | 13% | 16% | 14% |
| Preparations made of plants | 16% | 14% | 5% | 14% | 16% | 8% |
| Nutrition supplements (e.g. amino acids) | 10% | 12% | 10% | 11% | 10% | 20% |
| Homeopathy | 24% | 15% | 4% | 13% | 5% | 6% |
| Energising preparations (drinks, bars etc ...) | 11% | 10% | 9% | 9% | 13% | 12% |
| Anxiolytics (medicines for anxiety) | 8% | 1% | 4% | 8% | 10% | 6% |
| Sleeping pills / hypnotics | 5% | 3% | 4% | 4% | 10% | 10% |
| Products for hair loss | 5% | 4% | 1% | 8% | 9% | 1% |
| Appetite control products | 3% | 2% | 2% | 5% | 5% | 4% |
| Medicines for erection disorders | 2% | 1% | 2% | 2% | 1% | 3% |
| Other | 3% | 4% | 3% | 5% | 7% | 3% |
| Average number of "products" | 1,7 | 1,4 | 1,2 | 1,5 | 1,7 | 2,0 |
| None | 27% | 34% | 42% | 35% | 28% | 21% |

* : less than 0,5%

AVAILABILITY OF THE HEALTH PRODUCTS: WITH OR WITHOUT PRESCRIPTION?

If the idea of a more flexible way to deliver medicines becomes more important, Europeans and Americans are not completely ready to reconsider the existence of prescriptions even for daily treatments.

At least a plurality of Europeans (from 44% of Italians to 61% of Germans) as well as 40% of Americans do not wish to see treatments for some chronic diseases (used on a daily basis for some) to be delivered over the counter.

Contraceptives appear as the product that could be most eligible to an over the counter delivery. Here again, however, opinions are somewhat mixed with 40% of French favourable versus only 21% of Britons.

Americans, already familiarised with the self-service of a number of health products, have fewer reservations about the availability of some of these products without any prescription.

In the following list of prescriptions products, are there any that you wish could be available without prescriptions (in a pharmacy or a supermarket)?

Base : All respondents

| | French | German | British | Italian | Spanish | American |
|------------------------------------|------------|------------|------------|------------|------------|------------|
| <i>Unweighted Base</i> | 1,288 | 1,106 | 1,088 | 1,087 | 1,120 | 1,046 |
| Contraceptives | 40% | 22% | 21% | 36% | 37% | 28% |
| Antibiotics | 7% | 8% | 17% | 19% | 13% | 30% |
| Treatments for cholesterol | 8% | 5% | 15% | 20% | 16% | 19% |
| Treatments for high blood pressure | 4% | 6% | 14% | 15% | 10% | 19% |
| Sleeping pills / Hypnotics | 8% | 6% | 8% | 6% | 12% | 13% |
| Treatments for diabetes | 3% | 4% | 8% | 12% | 11% | 14% |
| Treatments for erection disorders | 6% | 4% | 8% | 6% | 8% | 8% |
| Anxiolytics | 4% | 1% | 4% | 9% | 7% | 5% |
| Other | 8% | 6% | 4% | 5% | 6% | 6% |
| Averagenumber of "products" | 0,9 | 0,6 | 1,0 | 1,3 | 1,2 | 1,4 |
| None | 47% | 61% | 54% | 44% | 45% | 40% |

While 30% of Americans would be favourable to the availability of antibiotics without prescription, only 7% of French would be. This could be an impact of the information campaign of the French National Health Insurance.

Finally, anxiolytics and erectile disorders treatments get a consensus: only between 1% to 9% of respondents say they wish these products would be available over the counter. While this may be reassuring for the anxiolytics, this consensus is somewhat surprising for ED treatments, when the barriers men have in consulting their doctors for those problems are considered.

* : less than 0,5%

About Harris Interactive

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