

PRESS RELEASE

HEALTHCARE BAROMETER 2020

HOSPITAL DIRECTORS IN THE CZECH AND SLOVAK REPUBLIC STILL FEEL THE DEFICIENCY OF NURSES, HOWEVER DOCTORS IN THE CZECH REPUBLIC ARE IMPROVING THE SITUATION

In Prague, 17th June 2020 - Based on the current results of an international survey in 2020, an increasing number of the Czech hospital directors had a shortage of nurses from 81 % (2019) to 83 % (2020). The directors of Slovak hospitals accounted for 82 % (78 % in 2019).

This year, 70 % of Czech directors (84 % in 2019) and 85% of Slovak directors (75 % in 2019) experienced a shortage of doctors.

Doctors' overtime in 2020 is perceived differently by the directors of Czech and Slovak hospitals. It is interesting to note that year-on-year, in the case of the survey in the Czech Republic, there is a decrease in this area by 5 percentage points (64 % in 2019, 59 % in 2020), while in the case of the Slovak survey there is an increase of 10 percentage points (48 % in 2019, 58 % in 2020). Czech directors perceive nurses' overtime as less of a problem in 2020 (41 %) compared to 2019 (46 %). Nurses' overtime, as regards the Slovak survey, saw an increase of 19 percentage points in comparison to 2019. (48 % in 2019, 67 % in 2020).

In the long run, the most popular measures to ensure a sufficient number of staff are non-financial benefits (eg. extra holiday), both in the case of directors of Czech hospitals (92 %) and directors of Slovak hospitals (91 %). Another option chosen by Czech directors was greater "cooperation with medical faculties" in 83 % of responses, which is an increase of 9 percentage points compared to 2019 (74 %).

These conclusions are derived from the results of an international survey conducted by the HealthCare Institute o.p.s. titled "Health Barometer from the Perspective of Hospital Directors 2020," which was carried out among its respondents during the months of March and April 2020. The directors of 154 hospitals with acute beds in the Czech Republic and 103 hospitals in Slovakia were surveyed. A total of 63 directors of Czech university, regional, municipal and private hospitals and 33 directors of Slovak hospitals of all these types responded. The aim of this international probe was to identify in a balanced and objective manner the current problems that hospital management has to face in the following areas:

1. Quality and availability of health care,
2. Human resources,
3. Safety,
4. Finance,
5. Evaluation of capacity in hospitals and the health care system.

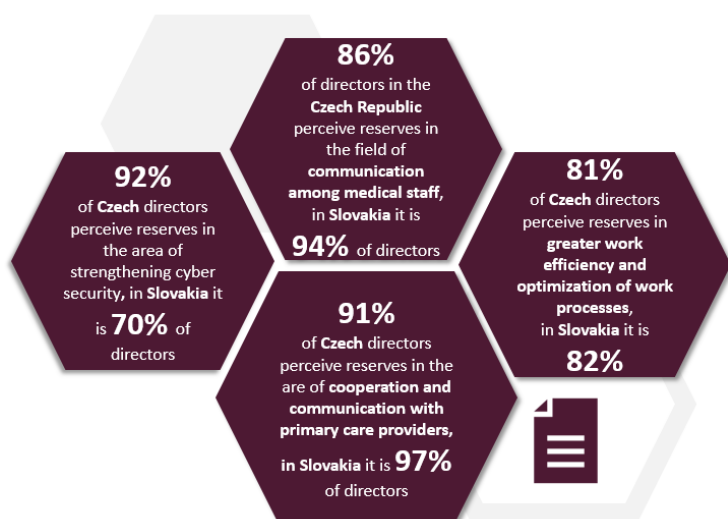


In the Czech Republic, this is the 12th year of this survey, in Slovakia this questionnaire has only been conducted for 3 years.

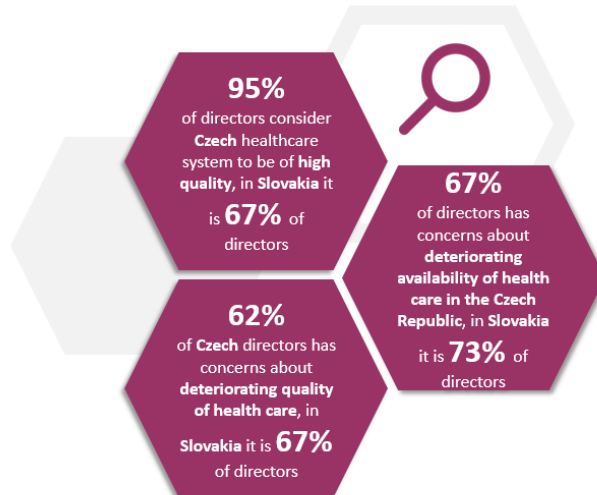
You can view the detailed results of the survey at:

<http://www.hc-institute.org/cz/projekty/barometr/barometr-zdravotnictvi-2020.html>

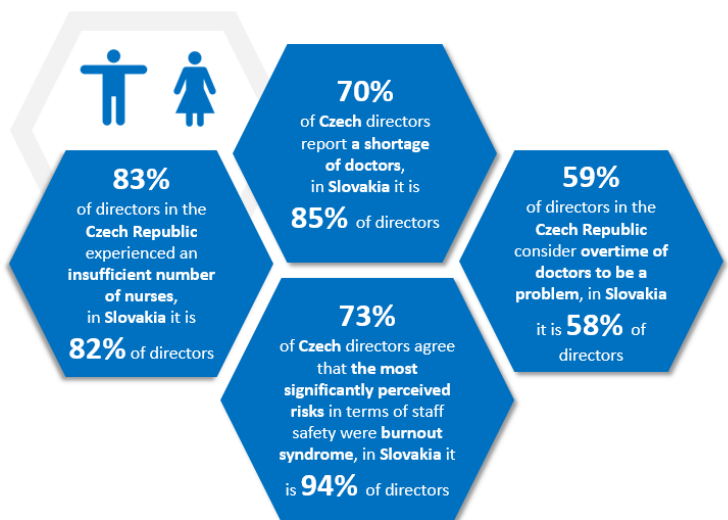
Reserves in the healthcare system



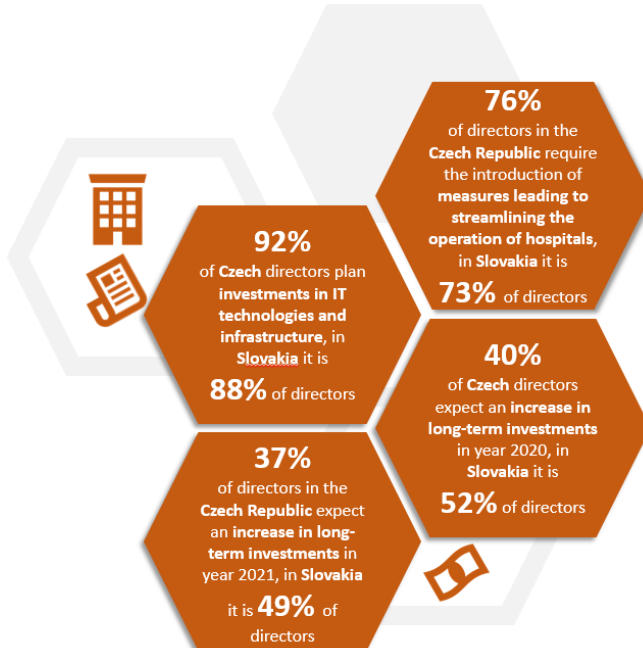
Quality and availability of health care



Human resources and safety



Evaluation of hospitals and finance



DETAILED RESULTS

HEALTHCARE BAROMETER FROM THE PERSPECTIVE OF HOSPITAL DIRECTORS 2020

Most hospital directors in the **Czech Republic** consider **the healthcare system in their country** to be of high **quality** in a Europe wide comparison (95 % in 2020, 91 % in 2019), the directors of Slovak hospitals are less optimistic in this respect (67 % in 2020, 75 % in 2019).

The largest reserves in the healthcare system are perceived by the directors of Czech hospitals in the following areas:

- Strengthening cyber security (92 %),
- Cooperation and communication with primary care providers (91 %),
- Improving communication among medical staff (86 %),
- Greater work efficiency and optimization of work processes in the hospital (81 %).

The largest reserves have long been perceived in both countries to be **in the field of communication**. The most deficient area in the case of Czech reserves in 2020 was the **strengthening of cyber security** (92 % in 2020, 66 % in 2019). In the case of **Slovak reserves**, it is the improving **of cooperation and communication with primary care providers** (97 % in 2020, 85 % in 2019).

Less than half (40 %) of directors in the Czech Republic expect an increase in long-term investments this year, in Slovakia it is 52 % of directors. When it comes to investments for next year 2021, about a third (37 %) of the Czech hospital's representatives were satisfied with their increase, in Slovakia it was about half (49 %). **The largest investments** are planned this year in the **purchase of new devices and equipment**, as well as in **IT technologies and infrastructure**. This was confirmed by the directors of hospitals in both countries.

SHORTAGE OF HEALTHCARE STAFF

The results of the "Healthcare Barometer 2020" survey shows that hospital directors experienced an insufficient number of nurses (83 % in 2020, 81 % in 2019). This percentage is similar in comparison to the results of the survey in Slovakia, where 82 % of directors faced a shortage (78 % in 2019). The situation is slightly better as regards doctors, the directors of **Czech** hospitals reporting a **shortage of doctors**, 70 % in 2020 compared to 84 % in 2019 (in Slovakia 85 % compared to 75 % in 2019). The survey also showed that directors in the Czech Republic consider overtime to be a smaller problem this year compared to the previous year 2019, for both nurses (41 % in 2020, 46 % in 2019) and doctors (59 %

in 2020, 64 % in 2019). In Slovakia, the situation in this area is somewhat reversed as directors are struggling with ever increasing overtime demands, for both nurses (67 % in 2020, 48 % in 2019) and doctors (58 % in 2020, 48 % in 2019). 62 % of the directors of Czech hospitals lack healthcare assistants (63 % in 2019), compared to 67 % of hospital directors in Slovakia (58 % in 2019).

SAFETY

Hospital representatives in the **Czech Republic** and **Slovakia** agree that the most significantly perceived **risks** in terms of staff safety were **burnout syndrome** (73 % of directors in the Czech Republic, 94 % in Slovakia) and the **aggression of patients and their relatives** (70 % of principals in the Czech Republic, 76 % in Slovakia).

The greatest fear is burnout and so 54 % of directors of Czech hospitals declared their efforts to reduce overtime work (also 54 % in 2019). There is a significant decrease observed in overtime work in Slovak hospitals compared to 2019 (63 % in 2019, 49 % in 2020). The reduction of the administrative burden on employees was reported by 64 % of directors in the Czech Republic (50 % in 2019), in Slovakia it was 58 % (45 % in 2019).

EFFICIENT HOSPITAL MANAGEMENT

When it comes to efficiency, the hospital directors are not united. 62 % of directors of Czech hospitals believe that university hospitals in the Czech Republic operate inefficiently, while for other hospitals it is 37 %. 70 % of directors of Slovak hospitals consider the management of university hospitals to be inefficient, while for other hospitals it is 27 %. 76 % of Czech hospital directors (70 % in 2019) require the introduction of measures leading to streamlining the operation of hospitals, compared to 73 % in Slovakia (65 % in 2019).

Detailed examples and "Best practices" of the leadership and hospitals' top management, health insurance companies and healthcare professionals in the field of increasing the efficiency and quality of care will be presented at the professional conference "Effective Hospitals 2020 - Strategy of Health Insurance Companies and Hospitals", which will take place on 24th and 25th November 2020 at Clarion Congress Hotel Prague - Vysočany. You can find the current working form of the professional conference program [here](#).

Daniel Vavrina – founder, HealthCare Institute o.p.s.: *"This year we have the opportunity to get acquainted with the results of the international survey" Health Barometer 2020 "from the perspective of hospital directors, which was conducted in the Czech Republic and Slovakia. I would like to thank all those who took part in the survey, especially during this difficult time of the coronavirus epidemic. The barometer evaluates the current problematic areas, with the aim of identifying the causes of problems and helping to find measures to prevent their occurrence. The results show that in most of the key compared areas, hospital management is struggling with the same problems, although in one country the problems are more significant, in the other they are felt to a lesser extent."*

However, it is very encouraging to find that the hospital management is aware of their deficiencies and is trying to find the means to eliminate them so that their hospital meets the criteria of a safe, high-quality and efficient healthcare system. The Directors' responses indicate that they plan major investments in hospitals. Not only the directors themselves but also the national media are beginning to notice this, which we greatly appreciate. At the same time, there is a clear interest in increasing the safety of patients and staff, especially in the areas of reducing administration, overtime and increasing patient awareness.

We would be very pleased if we could improve investment in hospitals, while increasing patient and staff safety, as these are key elements throughout the healthcare system and the HealthCare Institute has been striving for positive action in this area for 15 years already.

Furthermore, the survey found that concerns about deteriorating quality and the availability of health care are declining. It is apparent that in times of pandemic, the directors have confidence in the current healthcare system and they consider it to be of high quality. On the other hand, there are still concerns about the shortage of medical staff (mainly nurses) and it is great that hospitals are still active, either in terms of retaining existing staff or setting favourable conditions for admitting staff from other hospitals, other countries, as well as medical graduates - we evaluate this as very effective and positive personnel marketing.

It is evident that the process of implementing a safe, high - quality and effective health care system in the Czech and Slovak Republic is a challenging task of a long-term nature and I am very pleased that our survey supports and motivates the directors in their considerable efforts to find the causes of possible obstacles on their way to achieve this goal. We will be sending detailed results from this survey so that the hospital management is provided with this interesting data for comparison with other hospitals."

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REALIZER PROFILE - HEALTHCARE INSTITUTE O.P.S.

1. NATIONWIDE SURVEY "THE BEST HOSPITAL IN THE CZECH REPUBLIC"

A comprehensive evaluation project consists of four analytical parts (strategic perspectives of the long-term success concerning hospitals in the Czech Republic): **Outpatients' and hospitalized patients'** satisfaction and safety with hospitals in the Czech Republic (in 2020 already 15th year), satisfaction and safety of hospital **employees** in the Czech Republic (in 2020 already 13th year), **the financial health** of hospitals in the Czech Republic (in 2020 already 13th year) in cooperation with the CRIF company - Czech Credit Bureau, Inc. and Nexia AP, Inc.

Since 2006, when the non-profit organization HealthCare Institute begun this development project, over **1 million respondents** (hospital and hospital staff) have voted.

YOU CAN FIND THE RESULTS OF THE NATIONAL PROJECT FROM 2019 HERE:

<http://www.hc-institute.org/cz/projekty/nemocnice-ceske-republiky/celostatni-projekt-nemocnice-cr-2019.html>

2. PROFESSIONAL CONFERENCE "EFFECTIVE HOSPITAL - STRATEGY OF HEALTH INSURANCE COMPANIES AND HOSPITALS"

The professional conference is a discussion platform for hospital representatives, health insurance companies, the ministry, outpatient physicians and patients. It is also a place for the presentation of "best practices" of hospital directors and experts in healthcare industry in the areas of increasing the efficiency and quality of care provided and focusing on increasing productivity, quality and hospital performance.

YOU CAN FIND THE OUTPUTS FROM THE PROFESSIONAL CONFERENCE FROM 2019 HERE:

<http://www.hc-institute.org/cz/projekty/efektivni-nemocnice/odborna-konference-efektivni-nemocnice-2019.html>

3. NATIONWIDE SURVEY "THE HEALTH INSURANCE COMPANY OF THE YEAR"

The 6th year of the nationwide survey "Health Insurance Company of the Year 2020" aims to gradually improve the quality of services of health care providers, as well as their clients. Health insurance companies are evaluated throughout the year in terms of financial condition, their clients, hospital directors, outpatient physicians and prevention programs.

YOU CAN FIND THE RESULTS OF THE NATIONAL PROJECT FROM 2019 HERE:

<http://www.hc-institute.org/cz/projekty/zdravotni-pojistovna-roku/zdravotni-pojistovna-roku-2019.html>

4. THE SURVEY "BAROMETER AMONG THE HOSPITAL DIRECTORS"

The 12th year of the project "Barometer of the Czech healthcare system among the directors of 154 hospitals" evaluates the current situation in the Czech healthcare system. Since 2018, this project has also been implemented among the directors of 100 Slovak hospitals.

THE RESULTS OF THE PROJECT FROM 2020 FOR THE CZECH REPUBLIC AND THE SLOVAK REPUBLIC CAN YOU FIND HERE:

<http://www.hc-institute.org/cz/projekty/barometr/barometr-zdravotnictvi-2020.html>

5. THE SURVEY "BAROMETER AMONG MEDICS" (STUDENTS OF THE 4TH, 5TH, AND 6TH YEARS OF MEDICAL FACULTIES)

Through the project "Barometer among medics (students of 4th, 5th and 6th years of medical faculties in the Czech Republic)" we investigate the number of medical students in the Czech Republic that plan to seek employment there after their studies, and vice versa how many medical students have already decided to leave the Czech Republic and seek employment abroad. Since 2017, this project has also been conducted among students of Slovak medical faculties.

YOU CAN FIND THE RESULTS OF THE NATIONAL PROJECT FROM 2019 HERE:

<http://www.hc-institute.org/cz/projekty/barometr-mezi-mediky/barometr-mezi-mediky-2019.html>

6. THE NATIONWIDE SURVEY "BAROMETER AMONG STUDENTS OF PARAMEDICAL SCHOOLS" (SECONDARY, COLLEGES, AND UNIVERSITIES IN THE CZECH REPUBLIC)

It is the follow-up project to the survey of students of medical schools. Through the questionnaires and subsequent data analysis, we investigate the number of students of paramedical secondary schools, colleges, and universities who plan to seek employment in the Czech Republic after their studies, and vice versa how many paramedical students have already decided to leave the Czech Republic and seek employment abroad.

YOU CAN FIND THE RESULTS OF THE NATIONAL PROJECT FROM 2017 HERE:

<http://www.hc-institute.org/cz/projekty/barometr-mezi-sestrami/barometr-mezi-budoucimi-zdravotnimi-sestrami-2017.html>

7. THE SURVEY "BAROMETER AMONG PATIENT ORGANIZATIONS"

A special research among the representatives of 150 patient organizations in the Czech Republic who evaluate the current situation in the Czech health care via special questionnaire. They also determine to what extent this situation affects members of the individual patient organizations (i.e. patients – health care consumers).

YOU CAN FIND THE RESULTS OF THE PROJECT FROM 2016 HERE:

<http://www.hc-institute.org/cz/novinky/tiskova-zprava-informacni-propojeni-nemocnic-a-ambulanci-s-pacientskymi-organizacemi-je-nedostatecne.html>



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