



# Navigating the Future of EU Healthcare: Key Takeaways for Business Ahead of the 2024 European Elections

[Francesca Scassellati Sforzolini](#)

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Healthcare is going to be one of the most important issues on the ballot for the European elections in June, a Brunswick survey of 2,000 residents of France, Germany, Italy and Spain found.

The survey revealed widespread expectations among citizens for governments to establish policies on digitization, AI, and improved access and quality of care. Respondents also indicated that businesses should play an important role in shaping the future healthcare landscape.

In preparation for the new political reality post-election, healthcare executives need to better understand the priorities and perceptions of stakeholders to help inform business decisions in the coming term.

## The last EU mandate saw important milestones, but momentum is key

The pandemic ushered in a new era in European health policy, forcing governments and businesses to recognize the crucial role of cross-border collaboration in healthcare. During its last term, the European Commission presented several key initiatives such as the EU Beating Cancer Plan, and the biotech and biomanufacturing initiative; digital health also rose up the policy agenda with the agreement to create the European Health Data Space and approval of the EU Artificial Intelligence Act. But unfinished legislative business remains: The “once-in-a-generation” EU pharmaceutical package will be hotly negotiated between the Council of the EU and the European Parliament after the June elections.

While there will still be a focus in the upcoming term on the implementation of existing initiatives and rollouts in member states, everyone is eagerly awaiting to see what new health initiatives will come out in the next five years. With many vocal stakeholder groups advocating for their own causes, the incoming Commission will have its work cut out in choosing what to focus on in health.

For companies in the sector, ensuring that health doesn't slip down the priority list against competing economic and security issues will be essential to keep the current momentum, and ultimately ensure better health outcomes for patients across Europe.

## The role of industry

When it comes to responsibility for addressing healthcare issues, while there is some uncertainty about the role of EU policymakers, national governments and the life sciences industry, there are several main issues identified where all three groups have a role to play.

The public's expectations for EU policymakers are mainly around funding drug research and development, and mitigating health inequalities between EU countries. They see national governments as tasked with ensuring affordability of healthcare provisions and timely access to innovations. All of these, however, are also seen as crucial responsibilities lying with the pharmaceutical industry.

Overall, these results give a clear directive to healthcare businesses to openly engage and ensure greater collaboration between industry and policymakers. Healthcare businesses are no longer on the sidelines, but widely seen as part of society's system stakeholders. Even though June's vote will allocate responsibilities first and foremost to political stakeholders, industry must continue to play an active role, and help shape and drive the policy agenda – to the benefit of patients throughout Europe.

## AI is seen as one way to tackle important issues in healthcare

Brunswick research found that there are a number of structural issues in European healthcare systems that are top of mind for the public. Wait times and the inadequate number of healthcare professionals are perceived to be the biggest stumbling blocks. Unsurprisingly, these are also the top two structural areas respondents listed for more political focus and action – but also recognized these as leading areas where AI could help.

In fact, the majority of those surveyed generally support the use of AI across the healthcare system, consider it beneficial for patients, and are excited about its use in making healthcare systems run more effectively and efficiently.

### Six in ten are dissatisfied with structural capacity and efficiency issues



Q. How satisfied or unsatisfied are you with each of the following aspects of the healthcare system in <Country>? Total (N=2012)

### These are seen to be key opportunities of using AI in healthcare

1 Quicker diagnosis of conditions and diseases (45%)

2 Save time for healthcare professionals (34%)

Q. Which, if any, of the following do you think are the greatest opportunities of using AI in healthcare? Choose three of the options below. Total (N=2012)

Businesses should see these results as encouraging as AI plays an ever-greater role, but there is still important work to be done around communicating the use and application of AI transparently and proactively the closer it comes to patients. While generally supportive, the public still have significant concerns around AI, particularly around potential errors and patient harm.

Other priorities for regulation include preventing the spread of misinformation, and safeguarding privacy and security. Businesses should expect to play a key role in reassuring the public as well as policymakers of the safety of using AI in healthcare. The EU is leading the way globally with the recently adopted AI Act, and businesses can use this as an opportunity to engage in the debate.

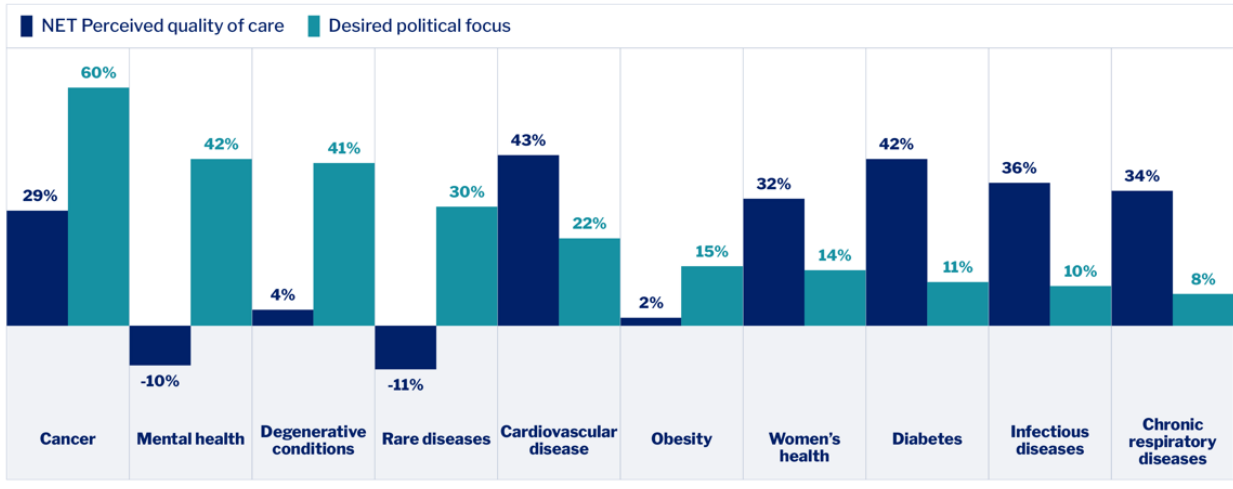
Healthcare professionals also have an important role to play in the successful rollout of AI: Brunswick’s study shows that the majority of respondents want easy access to speak to a doctor or nurse if they don’t trust the results generated by AI. This way, healthcare providers become integral to realizing AI’s potential in improving access to and quality of care.

## Results indicate a large gap in the quality of care, but cancer remains a top priority

When asked about specific diseases and health issues, respondents’ perception of the quality of care varies, with marked differences across the board by country, suggesting significant inequality in the care delivered.

Quality of cancer care is generally perceived as worse than that of other high-burden diseases such as cardiovascular disease and diabetes, with a marked difference in perceptions across the four countries. But cancer is consistently ranked as the top priority for greater political focus and action across all four countries, despite the strong policy focus of the current EU term. This indicates a lack of resonance between policy priorities and the public’s perception of their voices being heard.

In terms of priorities for political action, cancer is followed by mental health and degenerative conditions such as Alzheimer’s. Respondents also consider these two issues as among the lowest in terms of quality of care, but with a significant impact on quality of life and affecting the largest number of people.



Q. In your opinion, how do you assess the quality of care in [COUNTRY] for the following health conditions and diseases? This includes how easy it is to get a diagnosis and the best possible treatment. Total (N=2012); France (N=500); Germany (N=502); Italy (N=506); Spain (N=504).

Q. Which of the following health conditions and diseases would you like to see more political focus and action on? Total (N=2012); France (N=500); Germany (N=502); Italy (N=506); Spain (N=504).

Get in touch if you would like to continue the conversation and see the full results of the survey, including country-specific insights.

## To continue the conversation



**Francesca Scassellati  
Sforzolini**

Partner, Healthcare & Life Sciences  
Sector Group Europe Lead  
[fsforzolini@brunswickgroup.com](mailto:fsforzolini@brunswickgroup.com)

Francesca is a senior government relations and corporate affairs professional with deep knowledge of the healthcare sector and EU healthcare policy. She has spent more than 20 years designing and managing pan-European strategies and leading public affairs and communications campaigns tackling critical issues for global organizations in both the private and public sector.

### Methodology

Brunswick conducted an online survey of a nationally representative sample of the general public in France, Germany, Italy and Spain. [This sample can be considered representative of the voting population in the respective countries.]

Sample Size: N=2,000 Respondents, N=500 respondents in each market

Survey Timing: 7–12 March 2024