

MLP Health Report 2011:

Serious concerns about the sustainability of the healthcare system

- Fear of a crisis in patient care: 77 percent distrust the state healthcare system – 82 percent call for more action from politicians
- Almost two thirds of doctors already see a shortage of doctors – patients in structurally weak regions are particularly affected.
- Gloomy expectations: Only 16 percent are convinced that the current level of treatment and services can be maintained – 79 percent foresee an increasingly two-tier system for medical care.

Wiesloch/Berlin, 23th November 2011 – The general public and doctors are very concerned about the threat of a medical care crisis in Germany and accuse the politicians of inaction in this respect. At the same time, doctors in particular see a growing shortage of qualified personnel among their ranks – and especially in the federal states in the eastern part of the country, patients are already reporting a restricted level of services. Overall, Germans have a positive impression of their healthcare system – however there are significant regional differences. Citizens living in Saxony and Berlin appear to be the most satisfied, and at the other end of the scale come the residents of Mecklenburg-Pomerania and Thuringia, where the shortage of doctors is already clearly evident. The general public as well as doctors are pessimistic about the future development and expect further cuts to be introduced. Even now, more than a third of doctors have to, at least occasionally, postpone treatments for cost reasons. These are some of

Contact

Frank Heinemann

Tel +49 (0) 6222 · 308 · 3513
Fax+49 (0) 6222 · 308 · 1131
frank.heinemann@mlp.de

MLP AG
Alte Heerstraße 40
69168 Wiesloch

www.mlp-ag.de

the core findings of the 6th MLP Health Report. The representative study was commissioned by the financial services and wealth management consulting company MLP and conducted by the Allensbach Institute for Public Opinion Research, supported by the German Medical Association.

Page 2 of 8

Politicians are not doing enough to counteract the threat of a patient care crisis

The population and doctors fear a patient care crisis. More than half of the respondents voiced their concerns about their financial security, should they become dependent on nursing care. The level of confidence in the statutory nursing care system has also fallen significantly: Over three quarters of those surveyed are now concerned that the services are not sufficient to ensure a good level of care (2010: 64 percent). The figure among the surveyed doctors was even higher at 80 percent and highlights their even greater concerns. In this respect, their view of politicians is correspondingly negative. 82 percent of doctors and citizens demand that the legislators act more vigorously to support long-term nursing care. However, of those surveyed, a large portion of doctors (46 percent) and a significant element of the population (43 percent) doubt whether the politicians can succeed in creating a reliable framework to ensure a good level of care for all patients in need of care. "On the one hand, politicians have recently passed legislation concerning the start of capital-covered supplementary care," comments Dr. Uwe Schroeder-Wildberg, Chief Executive Officer at MLP. "This is a step in the right direction, however it is not enough.

The general public would also have supported a nursing care reform, that tackled the challenges at the roots - an aspect which is clearly shown by the MLP Health Report." Faced with a choice, a public majority of 43 percent would be in favour of compulsory supplementary insurance, but only 15 percent stated they would support an increase in premiums for statutory nursing care insurance. The picture is even clearer with doctors: 72 percent advocate compulsory supplementary nursing care insurance.

Page 3 of 8

Concerns about the shortage of doctors have increased significantly

Doctors in particular are increasingly seeing a shortfall in the numbers of doctors – two thirds of the respondents already view this as a problem (2010: 46 percent); and a further 23 percent expect it to become an issue in the future. The findings also reveal a clear east-west divide: In the eastern part of Germany, 69 percent reported a shortage of doctors in their region, whereas in the western part this figure stood at just 47 percent. So far, the general public is less aware of a shortage of doctors (13 percent), but one in five respondents expected this to become a problem. On a nationwide basis, citizens living in structurally weak regions with less than 25,000 inhabitants are particularly affected: Around 20 percent are already feeling the effects of the shortage of doctors, 29 percent think this will be an issue in the future.

Similarly to the responses received concerning the standard of long-term care, here again there is widespread dissatisfaction with the decisions and inaction of the policymakers. Overall, 72 percent of doctors

(2010: 73 percent) still have a less than favourable impression of the healthcare policies adopted by the federal government; the corresponding figure for the general public stands at 55 percent (2010: 61 percent). A clear doctor majority of 70 percent is of the opinion that the legislator underestimates the shortage of doctors and the subsequent effects this has on the level of care— despite the recently initiated Healthcare Structure Act (Versorgungsstrukturgesetz). However, most of the core provisions of the planned legislation are welcomed; as an example, 95 percent of doctors support the measures towards improved reconciliation between work and family life. Furthermore, 90 percent support the financial incentives to encourage doctors to take on a joint healthcare provision assignment with a colleague in rural locations.

Page 4 of 8

The President of the German Medical Association, Dr. Frank Ulrich Montgomery, also believes that the new Healthcare Structure Act is generally a step in the right direction: “The legislation is designed to ensure that patients can, in future, continue to consult a doctor in their own locality. Despite all the criticism levelled at some of the specific provisions, this act is fundamentally a move in the right direction.” However, he is also of the opinion that in the medium to longer-term, further measures will be necessary in order to make the healthcare system secure and sustainable in the future. “In view of the limited financial resources as well as the capacity and time constraints, we need to discuss how we can continue to sustainably offer all patients the necessary treatments. We have therefore initiated the prioritisation

debate and will steadfastly continue down this path.” In his view, it is beyond doubt that under the current financial framework conditions, the benefits of medical progress and developments will no longer be able to be effectively reflected in the doctors’ surgeries and hospitals in Germany – and certainly not in a society with a high life expectancy. “If the financial resources are not adjusted to match the care requirements, then sooner or later the politicians will be forced to face up to the prioritisation debate,” explains Montgomery.

Page 5 of 8

Positive assessment of the current level of healthcare provision

Overall, the degree of satisfaction with the healthcare system and the current level of healthcare provided have risen again in recent years. 72 percent of the population and 88 percent of doctors rate it as “good” or “very good”. In the opinion of a 59 percent majority of the population, the standard of medical care throughout the last two or three years has remained at the similar level (2010: 56 percent). At the same time, the level of concern about not receiving a necessary form of treatment if they should fall ill, is less than in previous years – yet at 32 percent, still widespread. More than two thirds of doctors consider their patient treatment options to be restricted for cost reasons (2010: 72 percent). Delays on account of budgetary constraints are commonplace: 59 percent of doctors have, on occasion, had to postpone treatments to a later date, and for 16 percent of doctors, this is a frequent occurrence. Around 20 percent of patients had to wait longer for an appointment during the last two to three years – for privately insured patients this figure stood at 9 percent. At the same time, 72 percent of

doctors confirmed from their own experience, that they frequently see patients in their practices who, from a medical perspective, do not need to consult a doctor.

Page 6 of 8

In Thuringia the shortage of doctors is particularly evident

In a nationwide comparison, Mecklenburg-Pomerania and Thuringia are the two federal states with the lowest level of satisfaction concerning the health care system and the level of treatments and services provided. At the top of the list in terms of perception of the shortage of doctors are the citizens of Thuringia (43 percent), and at the bottom of the list - the citizens of the Saarland (2 percent). Furthermore, Thuringia has the highest rate of patients complaining about longer waiting times in the last two to three years – both in terms of securing an appointment (35 percent) as well as waiting room times despite an appointment (36 percent). Berlin boasted the lowest rate of patients waiting longer for an appointment (12 percent). Concerns about not receiving the necessary treatment for cost reasons were also very pronounced in Thuringia (58 percent) compared to Rhineland-Palatinate (16 percent) at the other end of the scale. The complete state overviews can be viewed as a chart at www.mlp-gesundheitsreport.de.

Gloomy expectations and a low level of willingness to reform

The population's expectations with respect to the development in the next ten years remain very pessimistic. A mere 16 percent believe that the current level of healthcare provision can be maintained for all sections of the population. The overwhelming majority, however, foresees

additional burdens and restrictions: 79 percent expect rising state healthcare insurance, 78 percent anticipate higher additional charges for medications. They also foresee a transition towards an increasingly two-tier medical care system (79 percent). Furthermore, numerous citizens expect that the demographic change will increasingly burden the healthcare system: 61 percent fear busier doctor's surgeries and problems in securing an appointment. 51 percent even expect that expensive treatments for older patients will no longer be carried out, due to costs.

Page 7 of 8

Against the backdrop of an ageing society, doctors are of a similar opinion: A broad majority continue to view the healthcare system as being inadequately prepared to meet the demographic challenges. 86 percent of doctors therefore consider additional fundamental reforms to be necessary. In the general population, around three quarters of respondents stated that reforms are essential. Despite this realisation, the majority of the population rejects radical steps towards reform: 89 percent regard a future rise in state healthcare insurance scheme premiums as unreasonable (2010: 87 percent), 87 percent reject restrictions with respect to freedom of choice when consulting a doctor (2010: 85 percent). A large majority of the population (82 percent) are aware that they themselves can contribute greatly or very greatly to their own health maintenance. However, the survey findings also show that the level of health orientation has not increased in recent years: Since 2005, around one third of respondents have stated that they pay great attention to their personal health.

The MLP Health Report is a representative survey among some 1,800 German citizens and more than 500 doctors. This year, for the first time, the central questions concerning the assessment of the level of healthcare treatments and services provided were recorded for individual federal states. For further details, or to order a copy of the report, please go to www.mlp-gesundheitsreport.de.