

MLP Health Report 2014:

Hospital doctors raise the alarm – The public is worried about nursing care situation

- German citizens generally rate the German health system as very good (79 percent)
- Clear regional differences in the evaluation of hospitals – in Saarland only 32 percent have a positive opinion
- Massive increase: 79 percent of hospital doctors think the freedom in choosing treatment is restricted; Treatments delayed for cost reasons (64 percent) and also already withheld (27 percent)
- Staff shortages in hospitals: 79 percent of doctors expect situation to intensify further; Germans expect hospital closures in the coming ten years especially in Saarland (64 percent) and Lower Saxony (60 percent)
- 79 percent of doctors demand more commitment from the political arena – Measures agreed in the coalition agreement welcomed by the population
- Nursing care: 45 percent of Germans are worried about the cover – only a low number wishes to be cared for in nursing homes

Wiesloch/Berlin, 1st April 2014 – The Germans may still rate the health system as very good, but in many cases their previous experience in hospitals is still positive – even though there are clear regional differences: Lower Saxony is at the top of the list (49 percent), and Saarland at the bottom (32 percent). The number of complaints by hospital doctors about their lack of freedom to

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choose suitable treatments has increased dramatically. Treatments often have to be delayed for cost reasons – and sometimes even withheld to patients. A clear majority of doctors expects the staffing situation to intensify further over the coming ten years. The Germans also expect to see hospital closures in Saarland (64 percent) particularly and in Lower Saxony (60 percent). Against this background the public and doctors alike are clearly dissatisfied with the political actions – even though people generally welcome the specific measures agreed upon in the coalition agreement. People are looking at nursing care with similar scepticism and concern and are seriously worried about the cover here. Only a very low number of people want to go into a nursing home. These are some of the key results of the 8th MLP Health Report. The representative survey was commissioned by MLP, the financial services and wealth consultant, and conducted by the Allensbach Institute for Public Opinion Research.

Page 2 of 8

The Health System – very good status quo, cloudy outlook

79 percent of the population (Report 2012/2013: 82 percent) rate the performance of the health system and the quality of health provisions as good or very good. This figure is higher among doctors at 90 percent (2012: 93 percent). Waiting times still remain an annoyance for many people: Some 54 percent complain about lengthy appointment scheduling (2012: 52 percent), and long waiting periods in waiting rooms (66 percent; 2012: 64 percent). Those with statutory health insurance are predominantly dissatisfied (57 and 69 percent respectively), while only 33 and 44 percent respectively of the privately insured complained about this.

General reductions in the quality of health care over the coming ten years are expected predominantly by doctors 64 percent; and 38 percent of the population: Some 60 percent of both groups assume that the insurance companies

will only pay for basic medical care and that patients will have to bare many costs themselves, for example for operations. More than two thirds therefore expect to see a two-class-medical system. At the same time 84 percent of doctors expect difficulties in the future due to the constraints of having to prescribe everything that is medically necessary. In addition some two thirds of the population expect to see increased contributions to the statutory health insurance system.

Page 3 of 8

Hospitals raise the alarm

41 percent of the population give the German hospitals a good rating overall. However, the long-term comparison shows that the trend is falling: In 1995 some 50 percent still had a good opinion of the hospitals. Unlike the doctors: A large majority - 83 percent - are still convinced of the treatment quality in hospitals. There are clear differences among people's opinions from a regional point of view: The population in Lower Saxony (49 percent) has a good opinion of hospitals while only 32 percent are of the same opinion in Saarland (lowest rating).

Hospital patients rated the commitment of nursing staff as good (74 percent) as the space in hospital wards (63 percent). However, there were complaints that doctors were not able to take enough time (49 percent) and the nursing staff were overworked (40 percent). The following factors are important for people in hospital: treatment by experienced specialists (89 percent) and the hospital's good reputation (86 percent).

The current economic situation of the hospitals is still generally seen in a positive light by the hospital doctors (58 percent). After all, more than one in three hospital doctors also reports difficulties, and more than one in ten expressed concerns about very serious problems. Some 43 percent of hospital

doctors confirmed recent staff reductions. More than one in ten reports of departmental closures, a further 13 percent fear that such serious measures will occur. At the same time, the number of doctors who see their freedom to choose treatments restricted has grown from 60 to 79 percent; this figure is as high as 85 percent (2012: 63 percent) among assistant doctors. Moreover, Hospital doctors state that they often have to delay treatments for cost reasons (64 percent) and sometimes waiver treatment completely (27 percent). 26 percent of doctors see problems with the hygiene in hospitals.

Page 4 of 8

58 percent of doctors generally expect to see quality of medical care falling in the hospitals over the next ten years. 64 percent of the population fear a deficit in the number of nursing care staff. 59 percent are convinced that hospital doctors will be able to spend less time with their patients in the future. Among the doctors surveyed, 79 percent expect that the staffing situation in hospitals will intensify further. 65 percent of the population fear that they will have to be discharged earlier for this reason and that it will be difficult to obtain timely appointments for operations. More than three quarters of the public believe that the treatment in the hospitals can only be maintained with an increasing number of foreign doctors. 52 percent of doctors consider their foreign colleagues to be equally or more competent.

53 percent of the population assume that the health insurance companies will only assume the costs in hospital for the basis treatment in the future and that patients will have to pay for additional treatments themselves. After all, more than one in four is concerned that only necessary treatments will be performed in ten years time.

50 percent of the public fear that decisions about treatment and therapy will be made increasingly less often depending on purely medical aspects in the

hospitals - decisions will be made instead based upon the economic feasibility of individual therapeutic measures for the hospital. 70 percent of the hospital doctors underline the significance of privately insured patients for the economic success of the hospitals they work in; almost one in three thinks that the respective hospital could not be sustained otherwise. The worry that in ten years there will be far fewer hospitals than there are today in Germany is highest according to the survey among people in Saarland (64 percent) and in Lower Saxony (60 percent). Nationwide this opinion is shared by 50 percent of the population.

Page 5 of 8

Coalition agreement measures are not enough for survey respondents
In the population 62 percent are convinced that politicians have not concerned themselves enough until now with the subject of health. 79 percent of doctors demand more commitment in Health Policy – the overwhelming majority of over 90 percent does not, however, expect any fundamental changes or reforms.

However, the specific measures addressed in coalition agreement meet with approval among the public. 86 percent welcome the fact that patients should fundamentally have the right to obtain a second opinion from a second specialist or hospital doctor prior to operations at the expense of their health insurance company in the future. 90 percent of all doctors even consider this to be correct.

Two thirds of the population agree with the move to charge possible necessary additional contributions from the insured on an income basis and not at a flat rate. Even the majority of high earners with a net household income of 3,000 euros and higher agree with this (65 percent).

The move to set up a centralised appointment scheduling service, that arranges appointments with specialists or for out-patient treatment within four weeks, is supported by 45 percent of the population – however, 33 percent are expressly against such a structural change. The general practitioners take a clear stance against this (83 percent); the rejection is also very high among the hospital doctors at 58 percent, 37 percent would however, welcome such a move. However, only 15 percent of hospital doctors see the possibility of being able to arrange additional appointments for out-patient appointments on a larger scale.

Page 6 of 8

A further proposal is also under public debate in the coalition agreement – one that divides doctors' opinions: 45 percent are in favour of specialist doctors appointments only being possible with referrals from general practitioners and otherwise that the costs should initially be paid for by the patients themselves until these have been submitted to the insurance company. The other half of the doctors (50 percent) reject this proposal. The views between general practitioners and specialists are by the very nature of things absolutely contradictory.

To ensure the quality of treatment in hospitals the government has decided upon further measures in the coalition agreement: Doctors are more likely to approve of the implementation of unannounced checks by the insurance companies medical departments (48 percent) as well as an evaluation of the hospitals depending on their quality with a corresponding consideration when it comes to funding (47 percent). The foundation of an independent quality institute that collates data about individual hospitals and publishes these in the form of comparative lists (36 percent) is met with less favour. Direct quality contracts between the insurance companies and individual hospitals are approved of only one in five doctors. The hospital doctors are

sometimes much more open to the individual measures: For example, 53 percent of hospital doctors and as many as 61 percent of consultants and senior physicians express their agreement to assessing and funding the hospitals by their quality standards. The figure among general practitioners is only 39 percent.

Page 7 of 8

The general public says it is difficult for them to assess the quality of a local hospital or one in the region. 53 percent do not think they are in a position to do so; only 23 percent think they are. "The debate about the future quality of the health care sector has at least been initiated by the coalition agreement. But our results show that the general public and doctors expect much more from the government in the current legislative period," comments Dr. Uwe Schroeder-Wildberg, Chief Executive Officer at MLP.

Low desire for nursing home care

Only ten percent of the general public wish to receive nursing home care. Instead 54 percent of the population and 63 percent of the 60 year olds and older would prefer to stay at home with the aid and help of a mobile nursing care service. For the overwhelming majority of the population (86 percent), it is clear that in the next ten years an increasing number of older people will require nursing care. Two thirds of the population therefore expect that it will become increasingly difficult to safeguard the nursing care insurance. The general public has above average concerns in Mecklenburg- Western Pomerania (79 percent), but also in Schleswig-Holstein, Hamburg and Rhineland-Palatinate(73 percent respectively). At the same time confidence is low among the general public (ten percent) that the new government will safeguard the nursing cover care for all those requiring nursing care with suitable measures. Instead, many are worried that they will not be financially covered should they require nursing care (45 percent) – only 38 percent believe this is

not the case. Both the actual nursing care costs as well as the payments by the statutory nursing care insurance are rated very accurately by the general public. Against this background, some 73 percent welcome the decision by the coalition – as part of the statutory nursing care insurance system – to give more support for caring for dementia patients – even if the contributions to nursing care insurance increase significantly as a result in the future. The existing state support for additional insurance cover for nursing care cases ("Pflege-Bahr") is welcomed by a large majority of the population 60 percent (2012: 47 percent). "The general public is aware of the increasing nursing care risk and is also prepared to pay for part of the cover themselves. The political arena has taken the first steps here, further incentives for people to make their own provisions are still necessary", comments Uwe Schroeder-Wildberg.

Page 8 of 8

Regional results:

Selected key questions from the report were also surveyed by federal state. The respective diagrammes, opportunity to order a copy of the report, original recordings for the radio reports as well as further information can be downloaded from www.mlp-gesundheitsreport.de. The representative survey was conducted with 2,100 German citizens and more than 500 doctors.