

## MLP Health Report 2019

# Hospital physicians under massive pressure – reforms in the healthcare system fall flat

A significant majority of physicians and citizens in Germany still rate the current situation in healthcare as positive, yet:

- 62 percent of citizens complain about long waiting times and 34 percent about services being refused on the grounds of cost – 63 percent of physicians criticize adherence to schedules by their patients
- Acute situation in hospitals: 61 percent of hospital physicians complain of a lack of time for patients (2016: 50 percent) – 75 percent report that non-acute cases are often encountered in the emergency admissions
- Clear majority of physicians (59 percent) expect healthcare to get worse – and the population at large is particularly worried about a two-tier system of medical care and rising health insurance contributions
- The latest reform policies are leading to a sense of disillusionment among many citizens and physicians – indeed, 35 percent of the former and 67 percent of the latter give politicians a poor overall rating in this regard
- Citizens are increasingly open to telemedicine, but only one in ten physicians actually offers video consultations or is planning to do so

Wiesloch, October 9, 2019 – At an estimated level of €387 billion, the German Federal Statistical Office reported a new record for healthcare expenditure in Germany in 2018. The €1 billion per day mark was exceeded for the first time in the previous year. Set against this background, both the general public and physicians still perceive healthcare provision in Germany as a

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very high performance service and many citizens have once again had better experiences in the last few years. However, many complaints are still being received regarding long waiting times at practices and services that are no longer offered on the grounds of cost. In the hospitals, the situation continues to deteriorate: The main problem here is a lack of time due to the difficult staffing situation and the need to deal with many "non-emergencies" in the emergency admission. Although the overall impression of the health policy held by German citizens actually improved in 2016, this trend has now been reversed. The situation is also being compounded by the fact that two thirds of physicians are now dissatisfied. The world of politics has introduced numerous reform policies in the last few years – yet both citizens and physicians are unhappy with a whole host of these. The overall shortage of physicians has also become more acute – something which is becoming increasingly visible for physicians and the general public, particularly in eastern Germany. A significant majority of physicians also still expect healthcare provision to deteriorate further. The population is worried about what might happen in future, especially with regard to the risk of a two-tier system of medical care and increasing premiums. These were the key findings of the 10th MLP Health Report. The representative survey of the population and physicians, commissioned by financial services provider MLP, was drawn up by the Allensbach Institute.

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Complaints regarding long waiting times and refused services still persist. Most German citizens and physicians still rate healthcare provision in Germany as good or very good (77 percent and 89 percent respectively). 20 percent of German citizens even stated that they have had a better experi-

ence in the last few years. However, complaints regarding long waiting times have continued to increase, with 62 percent of the population now unhappy about this situation (2012: 52 percent, 2016: 55 percent). Those with statutory health insurance are disproportionately affected by this (65 percent). In addition, around one third of German citizens (34 percent) had the feeling that they were being refused medical services due to the associated costs (2012: 31 percent, 2016: 40 percent). Almost half of physicians (45 percent) confirm that this had already happened with them (2016: 44 percent). Postponements of treatment for cost reasons are even more widespread. 64 percent of physicians have already been forced to do so – something which happened less often three years ago (2016: 57 percent). Accordingly, 62 percent of physicians are worried about their freedom to choose the right treatments (2016: 61 percent). General practitioners are the most worried in this regard (66 percent).

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A significant majority of physicians (63 percent) also report that patients often fail to turn up for their appointment – 35 percent even state that they encounter this on a regular basis. The population at large, on the other hand, actually believes itself to be considerably more punctual. Indeed, only 19 percent concede that they have actually missed a doctor's appointment without cancelling. Greater adherence to schedules could relieve the pressure on specialists in particular: one in five finds it difficult to offer appointments within four weeks.

## Situation in hospitals becoming critical

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A whole range of deteriorations has been observed at hospitals. At 61 percent, a significantly increased majority of hospital-based physicians are complaining about a lack of time for their patients (2016: 50 percent). Assistant physicians are particularly hard hit by this (67 percent). Around half of hospital-based physicians surveyed indicated that they need to treat more patients. Alongside the lack of physicians, hospitals are also facing other staff shortages. It is becoming increasingly difficult to fill open positions with nurses – as confirmed by significantly more hospital-based physicians (84 percent) than three years ago (2016: 72 percent).

The structural problems are also becoming increasingly apparent in the perceived quality of treatment in German hospitals. Around one in five hospital physicians now believe this to be poor or not good at all – compared with just one in ten back in 2016. More than €6 billion is budgeted up to 2020 for the latest reform policies to improve quality in hospitals. Nevertheless, there are significantly more hospital-based physicians that consider the reform policies ineffective (47 percent) than those anticipating positive effects (37 percent). Three quarters of hospital-based physicians believe that economic aspects continue to override what is most appropriate from a medical point of view (2016: 77 percent).

Overcrowded emergency admissions are continuing to present problems. 75 percent of hospital physicians surveyed report that they must frequently deal with "emergencies" that do not warrant this description. However, 64 percent believe that this problem is solvable. 29 percent of these hospital

physicians argue that fees should be levied on patients who visit the emergency room without actual urgency. Those surveyed indicate a fee of €30 per case would be appropriate. A further 33 percent are convinced that improved emergency care on the part of resident physicians would significantly relieve the stress and pressure being faced by hospitals.

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The shortage of physicians is getting worse – particularly in the east. The population is already well aware of or anticipating a shortage of physicians. Considered less of an issue in 2016, this feeling is now even more pronounced in the east (64 percent) than in the west (40 percent). Resident physicians also believe that the shortage of physicians is getting worse. Three years ago, 60 percent were already reporting this in their own region or anticipating it imminently. This figure has increased to 71 percent in 2019.

At around two thirds, even more resident physicians now consider it difficult or extremely difficult to find a successor for their own practice than three years ago (2016: 57 percent). Only around a third of hospital-based physicians would consider working as resident physicians. The reasons stated for this by the physicians themselves focus in particular on their own state of health (17 percent), their field of specialisation (15 percent) and the financial risk (10 percent). 69 percent of resident physicians also consider it difficult to find suitable staff for their practice (2016: 59 percent). According to the Federal Employment Agency, around one in ten trainee medical and practice assistant positions remains vacant.

Various measures could help to secure nationwide coverage in the future. 88 percent of physicians support the idea of financial incentives to encourage joint practices in rural areas. In addition to this, 81 percent consider it prudent to establish more medical care centres in economically underdeveloped regions. A significant majority of physicians (81 percent) are convinced that the economic success of these centres also largely depends on securing sophisticated data and analyses during planning.

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Pessimistic future expectations – population anticipates rising premiums and two-tier system of medical care

Physicians are still expecting healthcare provision to deteriorate further over the course of the next ten years (59 percent, 2016: 62 percent). Among the general population, 30 percent expect to see things get worse overall. At the same time, a broad majority is still anticipating a two-tier system of medical care (60 percent, 2016: 67 percent) and rising insurance premiums (72 percent, 2016: 81 percent). Physicians are particularly worried about medical care problems in rural areas (90 percent) and having even less time for treating their patients (85 percent). In addition to this, three quarters no longer expect to be able to prescribe all medically necessary treatments in future.

Dissatisfaction with a whole host of the latest reform policies

The reform policies introduced in the last three years have added to the sense of disillusionment – with a whole host of them falling flat in the eyes of many citizens and physicians. One of the measures facing criticism is the policy to secure faster appointment allocation – with 57 percent of German citizens not expecting any discernible improvements here. In 2016, they still

considered "appointments centres" a good idea (58 percent). The introduction of a so-called general practitioner incentive was also greeted with scepticism. Slightly more than a third of German citizens refuse to accept this measure, despite the fact that physicians actually support it (63 percent). The physicians, on the other hand, are criticising the extension of consultation hours to 25 hours per week (62 percent). The recently stipulated minimum staffing levels for hospitals were also met with rejection – with only 12 percent of hospital-based physicians considering implementation possible. However, other reform proposals are actually welcomed by physicians, such as the potential for everybody to automatically be considered a potential organ donor in future, unless they object to this (62 percent).

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46 percent of German citizens and 70 percent of physicians believe that a comprehensive reform of the healthcare system is needed. A very large majority of physicians are also sceptical about whether this will even happen (75 percent). "Politicians are called upon to address structural improvements. Simply tinkering at individual weak areas in the system is no longer sufficient to get our healthcare system fit for the future – as underlined very clearly by our study," comments Dr. Uwe Schroeder-Wildberg, Chief Executive Officer at MLP.

Digitalisation only in its infancy – physicians believe politicians now have obligation to act

Physicians are in particular hoping that continuing digitalisation will provide solution approaches for the growing administrative burden that 80 percent consider to be the greatest problem they face in their day-to-day work. Ac-

Accordingly, 58 percent of physicians believe that the world of politics needs to do more in the field of digitalisation – a figure that rises to over two thirds among physicians aged 45 or under.

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53 percent of physicians are expecting digitalisation to change medical treatment from the ground up – while 4 percent believe this has already happened. Just under half consider the use of artificial intelligence (AI) to offer opportunities, whereas 38 percent believe it harbours more risks. However, AI cannot replace the medical expertise of physicians. Indeed, 83 percent believe that human physicians will continue to play the most important part in healthcare provision in future.

Citizens increasingly open to telemedicine, yet only very few medical professionals are planning to offer such services

The general public is increasingly considering telemedicine as a viable alternative to physically attending an appointment at a practice (2019: 33 percent, 2016: 22 percent). Indeed, over half of the under 30s would be happy to take up such an offer. Medical professionals are also increasingly expecting to see corresponding offers in the next ten years (89 percent), whereas considerably fewer German citizens believe this will be the case (48 percent). Physicians believe that telemedicine can provide a solution to the overall shortage of physicians (57 percent) and generally consider this approach to offer more advantages (58 percent) than disadvantages (30 percent).



However, a very small percentage of hospital-based physicians (4 percent) and even fewer resident physicians (2 percent) currently offer telemedical services or are planning to do so (86 percent and 88 percent respectively). The main reasons stated for this are the anticipated personal cost impact (48 percent) and increased administration expenses (74 percent). In addition to this, physicians are uncertain as to whether adequate data protection measures are in place for patients (63 percent).

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## About the MLP Health Report

This is already the tenth edition of the MLP Health Report. The Allensbach Institute surveyed more than 1,200 German citizens and over 500 physicians for the representative survey. You can find further information and charts, as well as the option to download the report at [www.mlp-gesundheitsreport.de](http://www.mlp-gesundheitsreport.de) (only in German).

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