

MLP Health Report 2012/13:

Nursing care, hospitals and shortage of doctors considered major issues in election year

- **Despite very high levels of satisfaction with the healthcare system, 47 percent of the general public and 73 percent of doctors call for further reforms – no consensus regarding proposals such as “citizens insurance”**
- **Nursing care: 71 percent of Germans demand greater commitment and involvement by politicians – 39 percent would consider “Pflege-Bahr” as a state-subsidy for private supplementary nursing care insurance**
- **Hospitals: 57 percent criticise the time constraints of doctors (1995: 31 percent), almost 50 percent consider nursing staff to be overburdened**
- **56 percent of doctors currently see shortages among their ranks – Hesse (73 percent) and in Hamburg (71 percent) are the worst affected areas with respect to patient complaints about long waiting times when visiting doctors**

Wiesloch/Berlin, 23rd January 2013 – Although confidence in the overall performance of the healthcare system is very high, the general public and doctors clearly see negative developments which are threatening future care standards. The majority of hospital patients complain about doctors’ lack of time and about overburdened nursing staff; one in two hospital doctors expects to see quality standards fall in the next few years. Concerns about

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.com

doctor shortages have increased. Many citizens complain of long waiting times, particularly in Hamburg and Hesse. In addition, more than one in three doctors has, at least occasionally, had to withhold or postpone medically necessary treatments for cost reasons. Consequently there continue to be widespread calls from the medical profession and the general public for reforms – albeit to a lesser extent than before the last federal parliamentary elections. There is little consensus with respect to individual proposals from policymakers concerning the structure of the healthcare system – only a slender majority favours the “citizens insurance”. Despite recently introduced reforms, the general public remains far from being satisfied with the government’s commitment to nursing care. Opinion is divided with respect to “Pflege-Bahr” as an incentive for private supplementary insurance. These are some of the core findings of the 7th 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.

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Little consensus for individual reform proposals put forward by policymakers

The general public’s level of satisfaction with the overall performance of the healthcare system now stands at a multi-year high of 82 percent (2011: 72 percent). Among doctors, 93 percent (2011: 88 percent) now rate the current healthcare system as good or very good. However, 40 percent of doctors and 39 percent of the general public (2011: 43 percent and 47 percent) feel that quality standards in healthcare services have fallen during the last two or three years.

This improved perception is also reflected in the falling level of criticism of the government: 42 percent of the population (2011: 55 percent) do not have

a good impression of the healthcare policies. On the other hand, a consistent majority of doctors accounting for over 71 percent (2011: 72 percent) remain disappointed with the government. 60 percent of them doubt that policymakers can secure a sustainably good level of healthcare provision for everyone – however, attitudes towards this aspect have significantly improved compared to previous years (2010: 81 percent).

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A sizeable proportion of the general public amounting to 47 percent (2009: 65 percent) still sees a need for further reforms; among doctors the corresponding figure remains much higher at 73 percent (2009: 81 percent). In both groups, and particularly within the general public, the figure has fallen compared to the previous election campaign period. Among doctors, only 4 percent (2009: 13 percent) now expect that after this year's election the next government will move ahead with fundamental reforms. Overall, the competence profile of the political parties with respect to healthcare policy is regarded as being somewhat weak – where a preference is expressed, the general public favour the CDU and SPD (both 15 percent).

The “citizens insurance” which features as the opposition’s dominant reform proposal in the upcoming election campaign, appeals to just over half of the population. These respondents are of the opinion that, in future, civil servants, the self-employed and well-paid employees must also be insured in the statutory scheme and that private provision should only be available within the framework of supplementary insurance. Doctors, however, are divided on this matter: 51 percent support the reform proposal, 41 percent oppose it. At the same time, the largest proportion of doctors (47 percent) are convinced that an introduction would have absolutely no effect on healthcare provision – 26 percent think it would lead to a worsening of the situation and only 20 percent feel it would bring improvement.

At the moment the German health fund remains broadly unchallenged: the reform proposal to once again allow statutory healthcare insurance providers to determine the level of insurance premium they charge – the proponents of which also include SPD politicians – is not backed by a majority. Instead, the largest proportion of the population (49 percent) favours equal premiums as the benefits and services offered by the various providers are largely identical.

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With respect to how the currently high surpluses generated by statutory health insurance system should be used, there is no majority in support of a reduction in healthcare premiums: Instead, a clear majority of doctors (59 percent) favour the accumulation of reserves, within the general public around 38 percent advocate this option. However, there is slightly less support for a refund of contributions (37 percent) or a reduction of premiums (34 percent).

“Currently, there is a danger that the buoyant financial status of the social welfare systems as a result of the favourable economic climate, may create a false sense of security,” comments Dr. Uwe Schroeder-Wildberg, Chief Executive Officer of MLP. “This positive short-term situation should however be used – during the next parliamentary term at the latest – to make the healthcare system sustainable for the future. In this respect, the proposal to introduce a citizens insurance falls far short of requirements as it fails to solve the financing problems.”

Hospitals: Personnel problems becoming increasingly evident

What impression do patients and doctors have of the treatments and services provided in German hospitals? In principle, patients (42 percent) and doctors (80 percent) give a positive assessment. In this respect patients praise, in

particular, the good standard of equipment (57 percent) and the helpfulness and willingness of the nursing staff (74 percent). However, more than half of Germans criticise the lack of doctors' available time to spend with their patients. This figure now stands at 57 percent and has almost doubled since the mid-1990s (1995: 31 percent). One in four respondents reported that there were too few doctors and specialist doctors at the hospitals where they received treatment in the past few years. Against this background, more than 50 percent of doctors expect healthcare standards to fall in the coming years.

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With respect to nursing care, the long-term outlook is viewed as distinctly negative: Over 46 percent (1995: 29 percent) of patients criticise the shortage of nursing staff, 48 percent (1995: no figure, 2007: 43 percent) reported that the nursing staff were overburdened. Due, in part, to this development around two thirds of doctors expect that it will become increasingly difficult to recruit qualified nursing staff. In their view there is a need to improve the working conditions of nursing staff (71 percent) as well as, in particular, to increase their levels of pay (66 percent).

Shortage of doctors: growing concerns and frequent long waiting times

Hospital doctors (65 percent) in particular view the shortage of doctors as already representing a nationwide problem. Within the medical profession, concerns have risen appreciably during the last two years: 56 percent already see a shortage of doctors in Germany (2010: 46 percent). More than one in five doctors expect such a situation to exist in the coming years.

The doctors are increasingly concerned about the provision of health services particularly at a regional level. 37 percent of doctors in private practice already see a shortage of doctors in their local area (2010: 22 percent). A further 28 percent expect this situation to arise during the coming years. The

eastern federal states are currently much more heavily affected than states in the western part of Germany: 54 percent of doctors in the East report a shortage of doctors in their region whereas in western Germany the corresponding figure stands at 35 percent. Doctors from rural and less densely populated regions see considerable deterioration: 58 percent of private-practice doctors from areas with less than 100,000 inhabitants are already experiencing a local shortage of doctors (2010: 31 percent).

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The whole medical profession is very pessimistic about the future development. Three quarters fear that the situation will deteriorate further throughout the country. Only 11 percent expect the situation to at least remain unchanged. Respondents cited, above all, the high burden of working in the medical profession (85 percent) as the cause of the shortage of doctors.

The general public is already feeling the effects of the shortage of doctors in the form of longer waiting times: 52 percent state that they have to wait a long time for an appointment; 64 percent complain that they still have to wait a long time in the waiting room despite having an appointment. Above all, people belonging to the statutory health insurance scheme were critical in this respect. 55 percent of them had, on occasion, already experienced difficulties in securing a doctor's appointment at relatively short notice, compared to 35 percent of privately insured patients. In addition, 67 percent - compared to 48 percent - have already had to wait a long time at doctors' surgeries despite having an appointment. Above all, statutory healthcare insurees complain considerably more frequently of often having to wait a long time.

Significant effects of rising cost pressure

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Almost 50 percent of doctors – double the figure in 2008 – see the quality of healthcare provision impaired due to the increasing cost pressure (46 percent). A further 43 percent fear that this situation will occur in the future. More than one in three doctors stated that, on occasion, they have had to withhold or postpone medically necessary treatments for cost reasons. However, for most doctors such cases were isolated instances. Citizens' concerns that treatments might not be available on account of the cost implications fell slightly to 31 percent but, nevertheless, remain widespread (2010: 42 percent).

Postponements due to budgetary constraints are more common than withheld treatments. 56 percent of private-practice doctors and 60 percent of hospital doctors have, on occasion, had to postpone necessary treatments to a later date, 16 percent and 15 percent stated that they were forced to do this more frequently.

In recent years 39 percent of the statutory health insurance insurees had to pay certain doctor treatments themselves as their health insurance did not cover these services. Among privately insured patients, only 29 percent reported that they themselves had to foot the bill for specific treatments or services offered by doctors.

Citizens of Hesse and Hamburg especially critical

Based on their statements, patients in Hesse (48 percent), Baden-Württemberg (47 percent) and Hamburg (46 percent) are the ones who most frequently have to pay for medical services out of their own pocket; at the other end of the scale are the inhabitants of Thuringia (25 percent) and Mecklenburg-Western Pomerania (26 percent). Patients in Hamburg (71

percent) and in Hesse (73 percent) also had to endure waiting room times most frequently – despite having an appointment. The population of Schleswig-Holstein (54 percent) fared best in this respect. In Hamburg in particular, but also in Brandenburg (each 60 percent), there were complaints about the general deterioration of healthcare services. However, the greatest demands for reform came from the population of Bavaria (56 percent) – and the least demands from the Berliners (34 percent). The quality of German hospitals is rated differently across the country. Here, the inhabitants of Hesse were the ones who most frequently gave a positive assessment (57 percent), the least positive judgements came from Schleswig-Holstein and the Saarland (each 29 percent). The complete federal state overviews can be viewed as charts at www.mlp-gesundheitsreport.de.

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The general public regards the previously introduced nursing care reform steps as inadequate

Despite recent reform measures, Germans remain dissatisfied with the government's commitment to nursing care. 71 percent of the population think that the policymakers should be doing more to secure and improve the nursing care situation (2011: 82 percent). Many judge from their own personal situation: 48 percent of respondents are concerned that they have inadequate financial resources should they be incapacitated and need long-term care (2011: 52 percent), only a minority of 39 percent (2011: 37 percent) stated that they are not unduly concerned.

Around 69 percent of respondents consider private long-term nursing care insurance to be important or very important. 47 percent of the population expressed support for state subsidies towards private supplementary nursing care insurance, only 28 percent were sceptical about such measures. Opinion with respect to the "Pflege-Bahr" option as an incentive for citizens to take

out private supplementary insurance, which came into effect at the start of the year, is divided. A sizeable proportion of respondents (39 percent) view the state subsidy of five euros as a valid reason to consider taking out a private supplementary nursing care insurance policy, whereas 40 percent think otherwise. Of those respondents who are concerned about their level of provision, a sizeable 50 percent view the “Pflege-Bahr” option as an incentive – only 31 percent do not.

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The MLP Health Report is a representative survey among some 2,100 German citizens and more than 500 doctors. Selected core aspects of the report were also collected for each of the individual federal states. For further details, or to order a copy of the report, please visit www.mlp-gesundheitsreport.de.