FRESENIUS

Press Release

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Study by Fresenius and Allensbach in three countries shows Germany lags in digitalization of medicine

- Major differences in levels of development: Spain leading the way
- Digitalization as a great opportunity: People want telemedicine, networking between their doctors and better diagnostics
- Fresenius active in digitalization: initiatives in all business segments

Germany still lags far behind other countries in the digitalization of medicine, with Spain in particular but also the United States significantly ahead in several areas. This finding comes from a representative poll conducted for Fresenius in Germany, Spain and the U.S. by the polling organization Allensbach Institut für Demoskopie. The poll also found that Germans are increasingly interested in digital services such as telemedicine.

The respondents in all three countries agreed that digitalization is, on balance, an opportunity for medicine. There is also cross-national agreement that the pandemic is acting as an accelerator of digitalization in the healthcare sector.

"People increasingly understand that digitalization brings great benefits to healthcare," said Stephan Sturm, CEO of Fresenius. "This is good news, because the success of digital applications depends to a large extent on their acceptance. For Fresenius, digital healthcare is a key growth area and part of our strategy for the coming years. Digitalization offers great potential to provide our patients with even better care, and more efficiently than ever before. High medical quality that is affordable – this is and remains the basis of our success."

Germany lags in digitalization, with Spain far ahead

Spain is leading the way when it comes to digitalization. Well over half of Spanish respondents said the digitalization of medicine is already playing a major role in the networking of healthcare facilities, diagnosing illnesses and telemedicine. This is most apparent in telemedicine, where patients come into very direct contact with digitalization: 55 percent of Spaniards and 43 percent of Americans, but only 16 percent of Germans, consider telemedicine highly important.

This is also reflected in usage: While 22 percent of Americans have used the option of a video consultation, the corresponding figure for Germans is only 2 percent. And although 46 percent of the population in Germany would agree in principle to consult a doctor via video, Spaniards (57 percent) and Americans (47 percent) are even more open to the idea.

Although interest in telemedicine is also growing in Germany, age is an important factor in attitudes: While two-thirds of people under 30 and half of those in the 30-to-44 age group could imagine a virtual doctor's visit, only one-third of over-60s could; for more than half of people 60 or older, a video consultation would be out of the question.

There are major differences even in the simplest digital offerings in the medical field, such as online appointment booking. In Germany, for example, only 15 percent of respondents said they can book an appointment with their general practitioner online, compared with 55 percent in both the U.S. and Spain. Accordingly, user rates are far apart: in Germany, only 8 percent of people have made an appointment with their GP online; in the U.S. and Spain the corresponding figures are 35 and 42 percent.

Accelerated by the pandemic: Digitalization of medicine as an opportunity

There is broad agreement among respondents in all three countries that the coronavirus crisis is accelerating the digitalization process in medicine: 46 percent of the U.S. population, 56 percent of Germany’s and 60 percent of Spain’s share this opinion.

According to significant numbers of the respondents, this increase in digitalization tends to offer opportunities for the healthcare sector: 49 percent in Spain, 34 percent in Germany and 32 percent in the U.S. think digitalization is likely to have more benefits than drawbacks for the healthcare sector.

People in the three countries also associate digitalization with a range of positive effects for healthcare. For Germans, the greatest advantage by far is a simplified exchange between doctors, but they also see major benefits from easier access to health information and in improved diagnosis and treatment options: 47 percent expect that therapies could be better tailored to the individual, and 35 percent that treatment options will improve generally.

Americans do not rate the advantages of digitalization for the healthcare system much differently than do Germans. But Spaniards do: Above all, they expect shorter waiting times, cost savings through greater efficiency and an increase in healthcare quality as particularly positive effects.

The populations in the three countries are closely aligned in terms of which developments they consider to be welcome. Above all, the introduction of digital medical records, the expansion of telemedicine services and the use of patient data for diagnosis are considered desirable by large parts of the German, Spanish and U.S. populations. Around a third of people in all three countries consider it desirable that increasingly more personal health data is recorded with the help of apps, smartwatches and fitness bracelets.

Fresenius on trend with many digital applications

The survey’s results on what respondents consider as desirable developments confirm the digitalization initiatives that all business segments of Fresenius have been advancing for years. On one hand, these aim at getting closer to patients, for example by better integrating them into preventive care and therapies; on the other hand, numerous applications help medical professionals to achieve even better treatment results still more efficiently and safely.

Fresenius Helios: Digital monitoring of the entire treatment journey as a goal

With its digital patient portal, Fresenius Helios is a pioneer in the German healthcare market. About every second Helios hospital already allows its patients to access treatment documents, book appointments online and have video consultations from home. By 2022, other medical data such as nursing documentation and medication records will also be available in a digital patient file. Almost 3 million users are already accessing the Helios Spain portal; almost all of Helios' Spanish hospitals are connected to it.

In numerous Helios Germany hospitals, nursing staff also receive digital support directly at the bedside: A patient's temperature, blood pressure and other vital signs are entered into a so-called spot check monitor and then transferred directly from it to an electronic patient file. These solutions are to be in use at all Helios Germany hospitals by the end of 2022.

The digital patient file with doctors' letters, test results and the complete clinical imaging is available at almost every workplace in the hospital. It brings great advantages in prescribing medication, because electronic prescriptions can be clearly assigned and tracked by all involved parties, such as doctors' practices and pharmacies; they can also be transferred digitally. Integrated software solutions provide a warning when there are possible interactions with other medications, which increases patient safety.

On the topic of telemedicine: All Fresenius Helios healthcare facilities have the technical capability to set up consultations via video, and some already offer these consultations on a regular basis. Helios Germany has also started online consultations in the pre-ambulatory area.

In the future, Helios will be able to digitally accompany patients throughout their entire treatment journey – whether they are staying in hospital or being treated as an outpatient.

Fresenius Medical Care: Home dialysis, networking and targeted therapies
Home dialysis is becoming increasingly popular, especially in the U.S., and it is important here that there can be close, remote monitoring of patients' health data. Fresenius Medical Care offers a cloud-based connected health home solution for patient management, including remote monitoring of dialysis, management of treatment processes, the creation of personalized prescriptions and daily treatment reports to the responsible medical professionals.

In the U.S., Fresenius Medical Care's connected healthcare platform, "TheHub," connects patients with care teams and providers using an app: It was launched in late 2019 and in 2020 documented more than 1.7 million sessions. The company has similar solutions in use in numerous countries in Europe, Africa, the Asia-Pacific region and Latin America; beyond the home dialysis setting, the digital solutions are also offered in-center and in critical care.

Fresenius Medical Care is increasingly focusing on the analysis of aggregated and anonymized patient data with the focus on improving patient outcomes. With the help of artificial intelligence and machine learning techniques, the probable progressions of a disease can be modeled in advance in order to develop the best possible therapies and avoid expected complications. For example, the risk of a cardiovascular event can be assessed at an early stage – before it becomes life-threatening.

Fresenius Kabi: Providing security to patients and caregivers
Fresenius Kabi promotes patient empowerment through apps for therapy advice and support, follow-up care and interaction with healthcare professionals. For example, the company supports patients receiving clinical nutrition through digital platforms for nutrition management, and offers a special app that helps patients with chronic kidney failure with their diet plan.

In addition, the company operates a digital patient platform for biosimilars to advise and educate patients about this type of pharmaceuticals. It will be extended to other therapeutic areas. The data from these applications will be used in the future to analyze treatment results, predict risks and facilitate therapy decisions.

Especially for hospitals, Fresenius Kabi offers digital solutions to support the correct medicating of patients and increase safety and treatment quality. Fresenius Kabi also ensures the integration of patient-related devices into hospital information systems to holistically manage and monitor the health status and treatment of critically or chronically ill patients.

For its own drugs, Fresenius Kabi introduced so-called RFID smart labels in the U.S.; these enable hospitals to automatically identify, locate and manage their inventory.

Fresenius Vamed: Telerehabilitation, predictive maintenance and digital planning of healthcare facilities
Fresenius Vamed makes rehabilitation and aftercare services for patients largely accessible and barrier-free with digital solutions. Thanks to telemedical offerings, services can be provided more flexibly and from any location.

In the area of technical services, Fresenius Vamed has developed digital solutions for predictive maintenance. By optimizing maintenance and servicing, they help

secure the reliability and dependability of technical equipment and systems in healthcare facilities.

In the project business, Fresenius Vamed uses digital solutions – so-called building information modeling (BIM) concepts – to simulate and optimize the entire life cycle (planning, development, construction and operation) of a healthcare facility during the planning phase.

Curalie: platform open to third parties for digital health services

Whether cardiological diseases and health risks, diabetes, renal insufficiency, high blood pressure, obesity or orthopedics: In many areas, the Fresenius subsidiary Curalie offers fully digitized solutions for the treatment of chronically ill patients.

The Curalie digital health platform enables the integration of devices, video calls and chats, referrals to the hospital information system, treatment plans and real-time analyses. Another focus of the health application is on preventive care offerings. Together with medical experts, Curalie develops digital health promotion programs for employers and their employees.

Curalie's "OP Begleiter" (surgery companion) program prepares patients for their hospital stay and surgery. It starts up to three months before the operation and contains the most important information, helpful checklists and relaxation and physiotherapy exercises to prepare the patient holistically for their operation.

Curalie is also developing digital services for rehabilitation and aftercare. Tele-rehabilitation aftercare, for example, takes place directly after rehabilitation measures, and supports patients as they flexibly pursue remaining therapy goals from home.

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proceedings, and the availability of financing. Fresenius does not undertake any responsibility to update the forward-looking statements in this release.

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