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**Fresenius Medical Care North America 2015 Health Indicator Survey Finds Americans and Physicians Are Not Confident in the Ability of the U.S. Health Care System to Meet the Needs of Chronically Ill Patients**

**-- 99% of Physicians Surveyed Say Chronic Care Should Be a Priority for the U.S. Health Care System, But Only 45% Believe That is the Case --**

**-- Highlights Need for Specialized Care Networks --**

WALTHAM, Mass. – November 4, 2015 – The U.S. health care system does not optimally meet the unique needs of people with chronic conditions, according to research findings released today by Fresenius Medical Care North America (FMCNA), a division of Fresenius Medical Care (NYSE: FMS).

The FMCNA 2015 Health Indicator surveyed a nationally representative sample of 1,000 Americans and more than 280 physicians to gauge their perceptions of the ability of the health care system to meet the needs of the chronically ill. Chronic diseases include a range of conditions that require continuous treatment and patient support. Notably, the overwhelming majority (99%) of physicians believe that chronic care should be a priority for the U.S. health care system, yet only 45% of physicians reported that chronic care is currently a priority. The results of the FMCNA 2015 Health Indicator survey will be presented at the [FT-FMCNA Chronic Care Forum](#) in New York City later this morning.

The current shortfall in chronic care is more than just a clinical crisis. It is also an economic one. According to the Centers for Disease Control, approximately 20% of people in the U.S. live with at least one chronic condition and their treatment accounts for 86% of the country's health care costs.

Ron Kuerbitz, CEO of Fresenius Medical Care North America, commented:

"In both the primary and acute care settings, the U.S. health care system is rapidly transforming to provide a better coordinated care experience, resulting in improved patient outcomes and lower costs. The FMCNA 2015 Health Indicator Survey makes clear that the country desperately needs to put the same focus on the unique needs of the chronically ill. It is imperative that we bring an integrated approach that coordinates regional health systems with condition-specific clinical and psychosocial services to equip chronic patients, their families and caregivers with the tools,

support and services necessary to manage their conditions. Today at the Chronic Care Forum we are pleased to bring together leaders from across the health care industry to have a candid discussion about the challenges in building these systems and to share some early indicators of success. This is just the start of the conversation. From here, we must work together to build a system that improves patient outcomes and the quality of life for those with chronic diseases.”

### **The Health Care System Does Not Offer Coordinated Care for the Chronically Ill**

Physicians surveyed overwhelmingly believe that coordination with colleagues enables them to deliver better care to patients, yet they also feel that the system does not support this collaboration. Patients believe their providers do not communicate enough and that their quality of care is impacted.

- Virtually all physicians (97%) agree that working with other medical professionals provides patients with better care overall.
- More than half (55%) consider insufficient coordination among other physicians a significant obstacle to adequate chronic care.
- Yet over half (54%) also note that working with other physicians or medical professionals complicates the process of caring for a patient.
- Nearly one quarter of chronic disease patients who see multiple doctors say they do not believe their doctors communicate with each other to address all of their medical needs in the best way possible.

As a result, chronically ill patients and their loved ones must navigate a complicated health care system that is not equipped to meet their needs.

### **Physicians and Patients Define Care Needs Differently**

The vast majority (90%) of physicians are focused on providing the best possible medical care but patients and their families have unmet treatment needs that extend beyond traditional medical care.

- Over a quarter (28%) of the general population report that their providers never discuss non-medical care with them.
- Only 57% of physicians report that psychological care and psychosocial services are a high concern.
- 40% of survey respondents report that their health care providers never discuss psychological care with them.
- Nearly 80% of physicians believe that they often discuss medical treatments with patients; however, only 45% of the general population says that their doctor often discusses medical treatments with them.

### **Patients Challenged to Successfully Manage Their Conditions**

Patients recognize that the system does not offer the support they need to manage their conditions, which can have a negative impact on their quality of life.

- At roughly 40%, both patients and family members agree that the health care system is not effective in helping them with psychological care or psychosocial services and 40% of physicians agree.
- Over half (55%) of physicians say their patients need assistance navigating the health care system, such as coordinating between all providers and treatments.
- One quarter of those who have a chronic disease spend at least an hour per day directly taking care of their disease.

### **Integrated Networks Offer a Possible Solution**

These findings underscore the urgent need for specialized, integrated networks that enable sufficient flexibility and deliver optimized, evidence-based care. Perhaps more importantly, patients want the opportunity to manage their own care.

- 90% of patients say they are prepared to take care of needs arising from their disease.
- Two-thirds of physicians say they would more effectively treat patients if they had more integrated care networks.
- 86% of the general population says that a coordinated treatment experience is important.

"Even in the most effective, integrated health systems, current models of care delivery are not adequately meeting the needs of patients with complex medical conditions," said John D. Birkmeyer, MD, Executive Vice President, Integrated Delivery System and Chief Academic Officer, Dartmouth-Hitchcock Health System. "As our own health system moves from volume to value-based payment models, we are looking for innovative care models and partners with specialized networks and expertise for managing these high risk, high cost populations."

A summary of the survey findings from the [2015 FMCNA Health Monitor](http://www.freseniusmedicalcare.us/fileadmin/data/us/pdf/FMCNA-2015-ChronicCareReport.pdf) can be found at: <http://www.freseniusmedicalcare.us/fileadmin/data/us/pdf/FMCNA-2015-ChronicCareReport.pdf>

### **Survey Methodology**

The Fresenius Medical Care North America 2015 Health Indicator consisted of an online survey of 288 physicians and a phone survey conducted among 1,000 general population adults.

The online survey of physicians was conducted between September 14 and September 21, 2015, among 288 physicians, distributed among cardiologists (25%) nephrologists (23%), endocrinologists (25%) and hospitalists (26%). Physician respondents were required to have at least one year of experience and work directly with patients.

The general population telephone survey was conducted between September 11 and September 17, 2015 among 1,000 general population adults 18 years of age and older living within the United States. The sample is nationally representative of the

U.S. population as it relates to age, gender, region and ethnicity. A dual sampling method of landline and cell phone was used. The total sample has a margin of error of +/- 3.1% at the 95% confidence level.

The surveys were both conducted by FTI Consulting.

**About Fresenius Medical Care North America**

Fresenius Medical Care North America is the premier health care company focused on providing the highest quality care to people with renal and other chronic conditions. Through its industry-leading network of dialysis facilities, outpatient cardiac and vascular labs, and urgent care centers, as well as the country's largest practice of hospitalist and post-acute providers, Fresenius Medical Care provides coordinated health care services at pivotal care points for hundreds of thousands of chronically ill customers throughout the continent. As the world's only fully vertically integrated renal company, it offers specialty pharmacy and laboratory services, and manufactures and distributes the most comprehensive line of dialysis equipment, disposable products, and renal pharmaceuticals. For more information, visit the FMCNA website at [www.freseniusmedicalcare.us](http://www.freseniusmedicalcare.us). For information about patient services, visit [www.ultracare-dialysis.com](http://www.ultracare-dialysis.com).

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