

Consumers for
Quality Care

Fall 2018 Health Care Experience

October 2018

© 2018 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

Executive summary

- Americans are not content with the health care system and many say it is the top consideration informing their 2018 vote.
- Americans want to see their elected officials do more to improve the health care system. And they believe that the private sector has a key role to play.
- Consumers are most concerned with the cost of getting health care – both in terms of total fees and in terms of the difficulty of anticipating the actual costs of health care services to the individual patient.
- Americans want political and industry leaders to focus on policy reforms that make the health care system more affordable and transparent about costs to consumers.



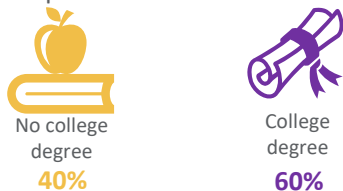
BACKGROUND ON THE STUDY

Demographics

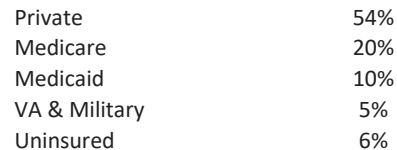
Gender profile



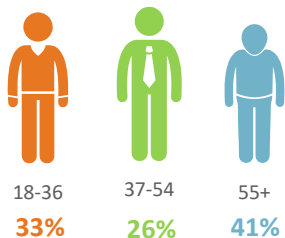
Education profile



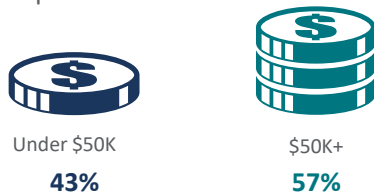
Health insurance



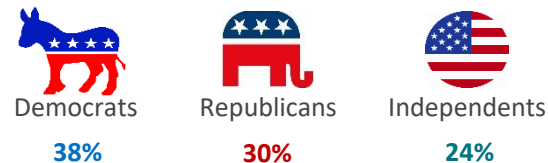
Age profile



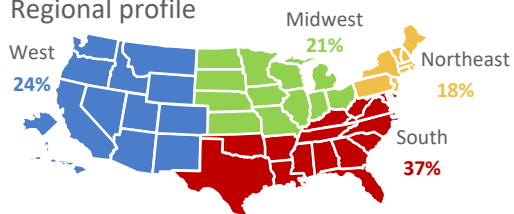
Income profile



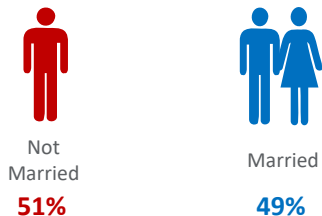
Political Party



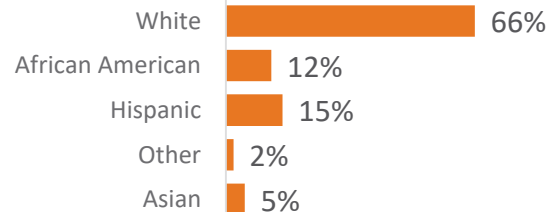
Regional profile



Marital Profile



Racial profile



Methodology

Online interviewing

These are findings from an Ipsos poll conducted October 4-11, 2018 on behalf of Consumers for Quality Care. For the survey, a sample of roughly 1,730 adults age 18+ from the continental U.S., Alaska and Hawaii, with boosts of 250 African Americans and 250 Hispanics. Interview was conducted online in English and Spanish.

The sample for this study was randomly drawn from Ipsos's online panel (see link below for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see link below for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2016 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 2.7 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following ($n=1,730$, $DEFF=1.5$, adjusted Confidence Interval=4.2).

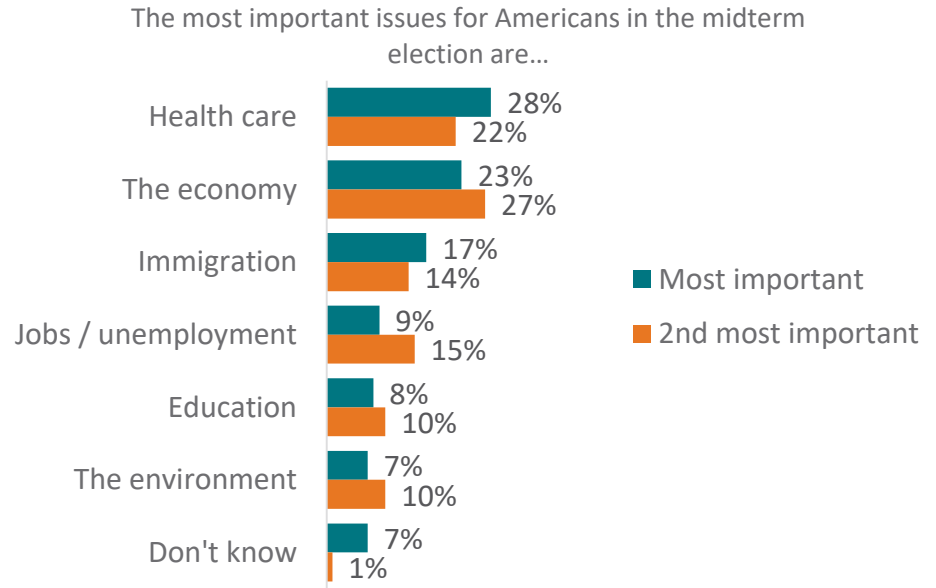
2018 POLICY PRIORITIES



Health care is a top issue for more than half of Americans for the upcoming election

Health care and the **economy** are important political issues for Americans in this midterm election.

- There is a noticeable generational variance in the importance of health care as a political issue. Likely because older Americans are more likely to use health care than younger Americans. 31% of Millennials rank health care as a top two issue compared to 45% of Gen Xers and 66% of Baby Boomers.
- Health care is a less pressing issue for Hispanics, of whom 32% ranked health care as a top two issue. Comparatively 58% of African Americans and 53% of White Americans ranked health care in the top two.

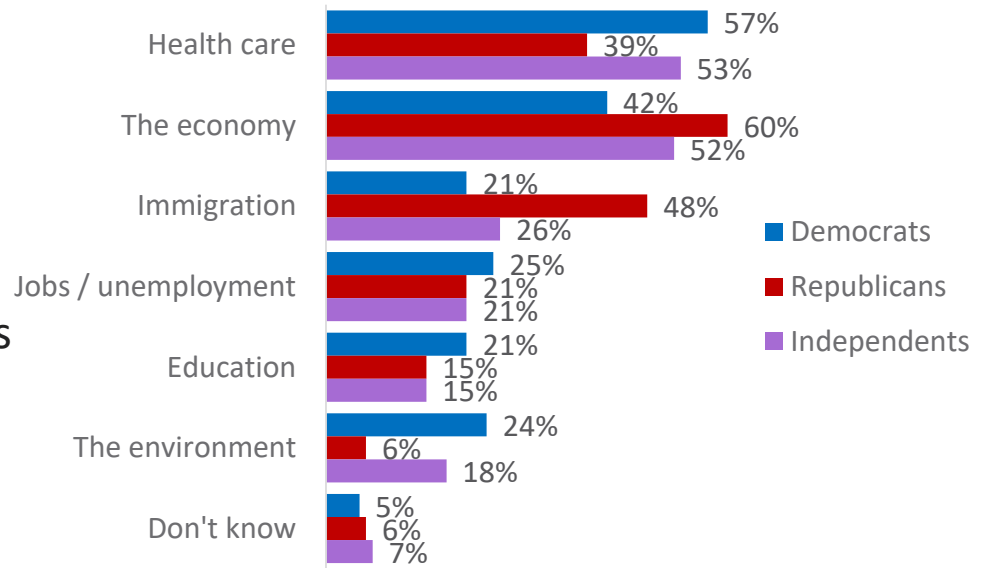


Q2 Thinking about the upcoming election, which of the following issues is most important to you?
Q3 And from the same list, which issue is the second most important to you?
Base: All Respondents (Total n=1730)

Party lines divide Americans on priorities for the midterm election

Health care is a more important issue in the midterm election for Democrats and Independents than Republicans.

Republicans say the **economy** and **immigration** are more important issues for the midterm election than Democrats or Independents.



Q2 Thinking about the upcoming election, which of the following issues is most important to you?

Q3 And from the same list, which issue is the second most important to you?

Base: All Respondents (Democrats n=770, Republicans n=425, Independents n=393)

© 2018 Ipsos

Americans want elected representatives to give more priority to improving the US health care system

Americans believe **improving** the health care system should be more of a **priority** for elected representatives than it is.

- 56% of Americans believe that improving the health care system is currently a priority for elected officials. However, 84% of Americans believe that improving the health care system should be a priority for elected officials.
- The issue of health care improvement is non-partisan. 91% of Democrats believe improving the system should be a political priority and 78% of Republicans agree.



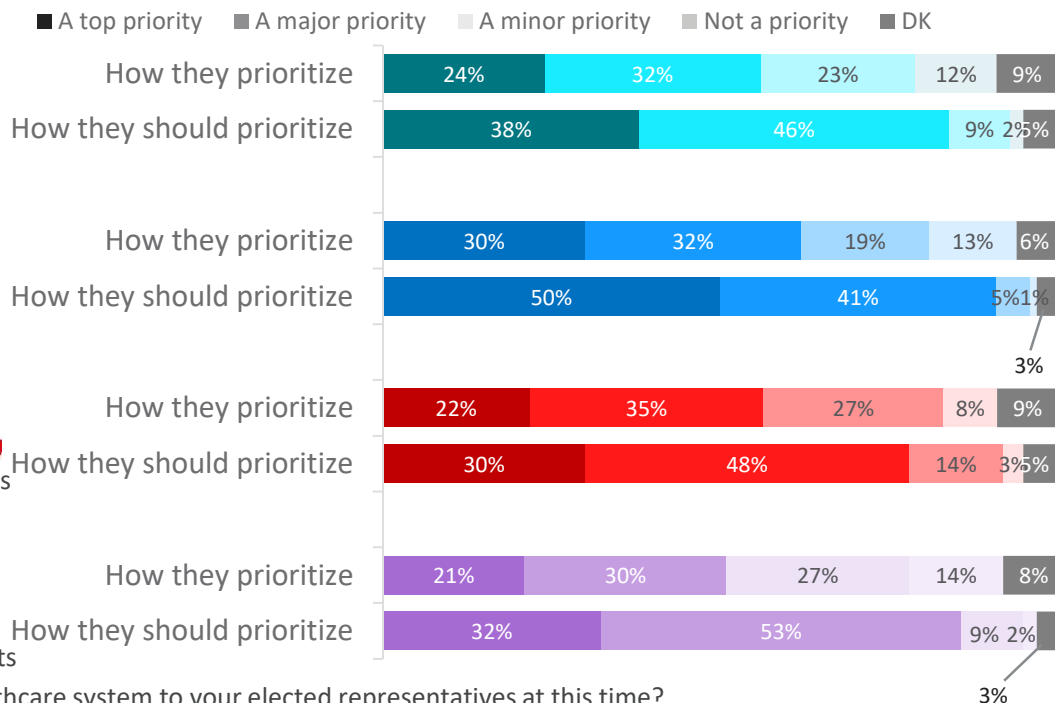
Democrats



Republicans



Independents



Q11 In your opinion, how much of a priority is improving the US healthcare system to your elected representatives at this time?

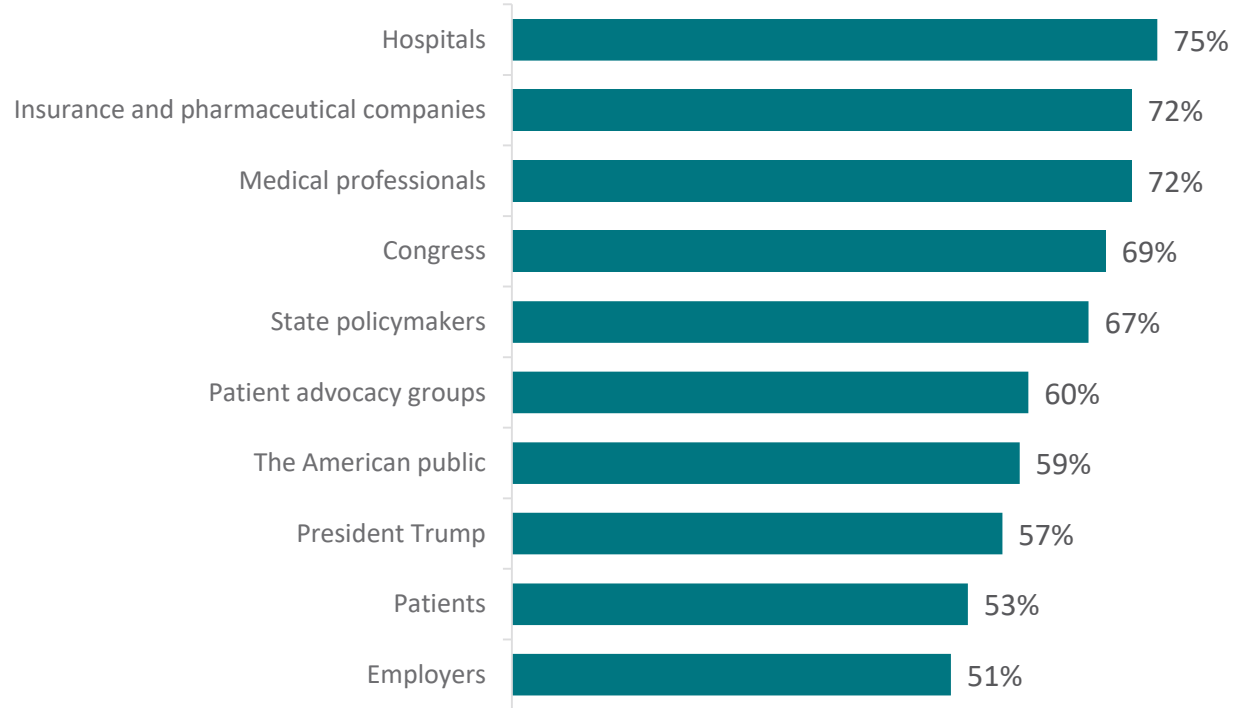
Q12 In your opinion, how much should the elected officials representing you prioritize improving the U.S. health care system?

Base: All Respondents (Total n=1730, Democrats n=770, Republicans n=425, Independents n=393)

Americans believe those in the health industry can have the largest impact on improving health care

Entities directly related to health care were most often cited as having a significant role in improving health care.

However, the majority of Americans also think Congress, state policymakers, and the president can have a significant impact.

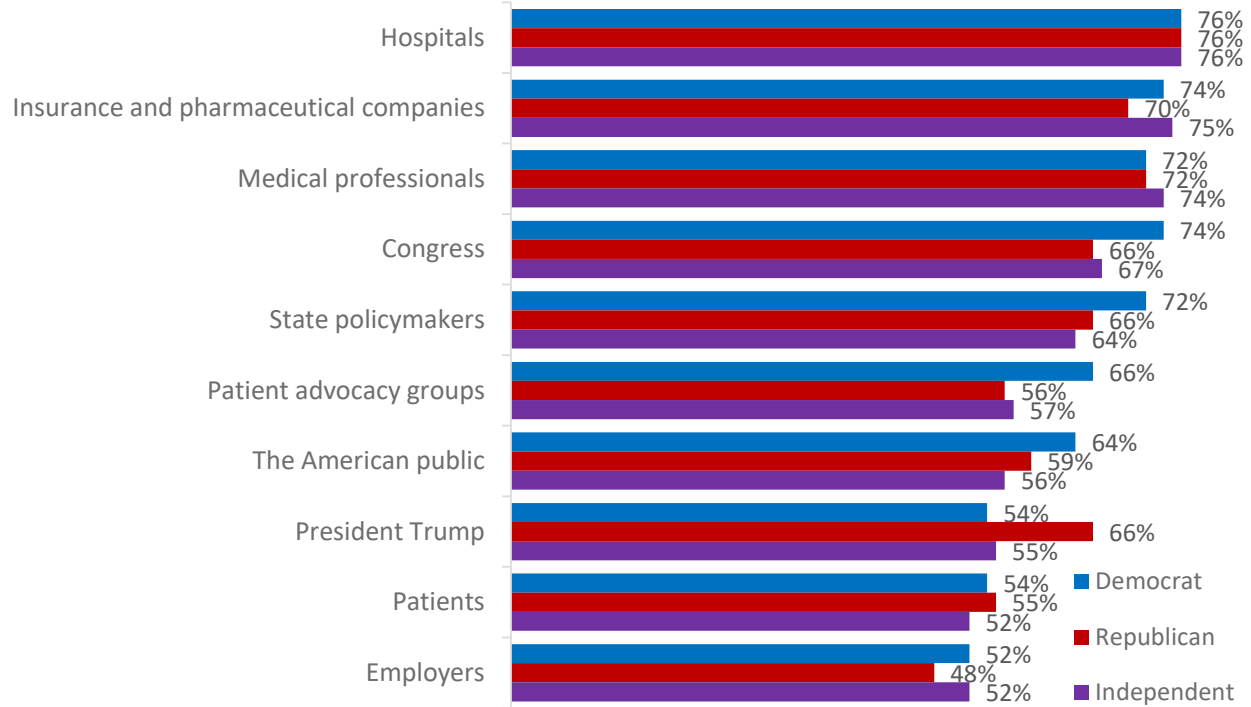


Q13 Do you think the following have a significant role in improving U.S. health care?
Base: All Respondents (Total n=1730)

Democrats and Republicans are divided on which elected officials can have the greatest impact

Across parties, Americans say health industry entities have the largest impact on improving US health care.

Democrats are more likely to say congress or state policymakers have a significant impact, while Republicans are more likely to cite President Trump as having a significant impact.

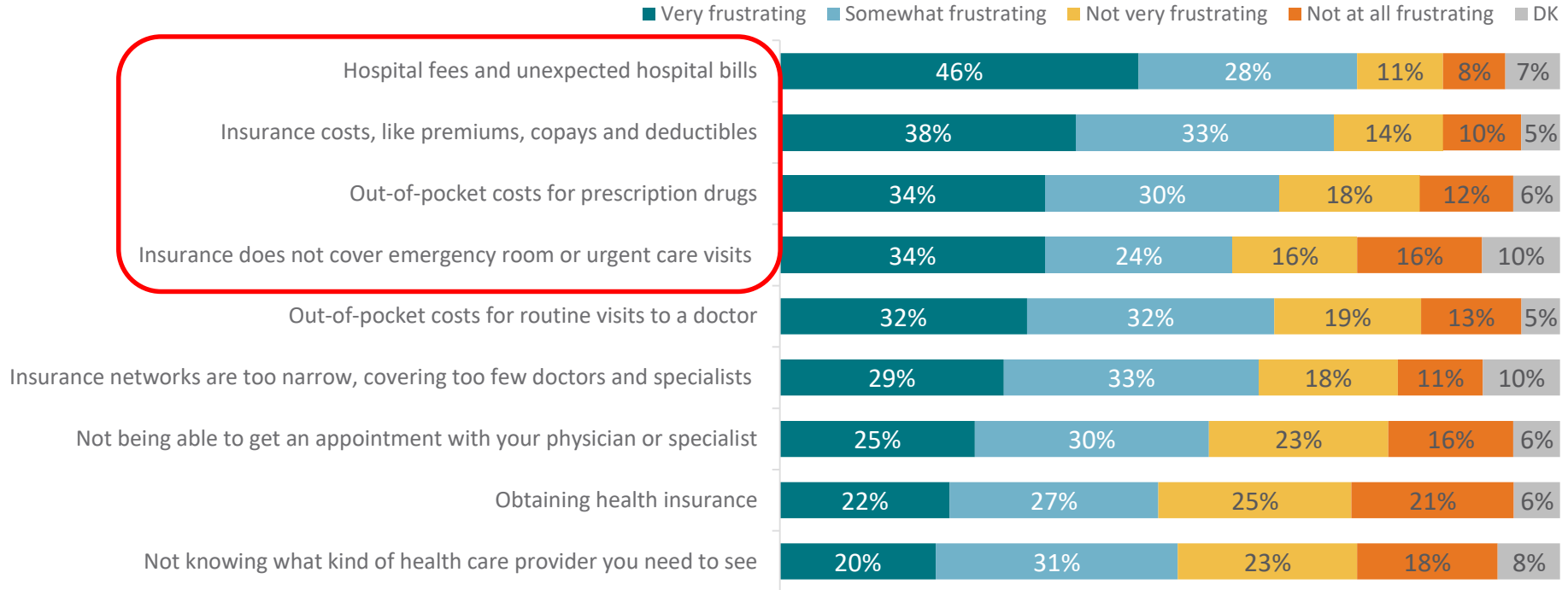


Q13 Do you think the following have a significant role in improving U.S. health care?
Base: All Respondents (Total n=1730)



USING THE HEALTH CARE SYSTEM

Americans are more frustrated by health care costs than coverage or access issues

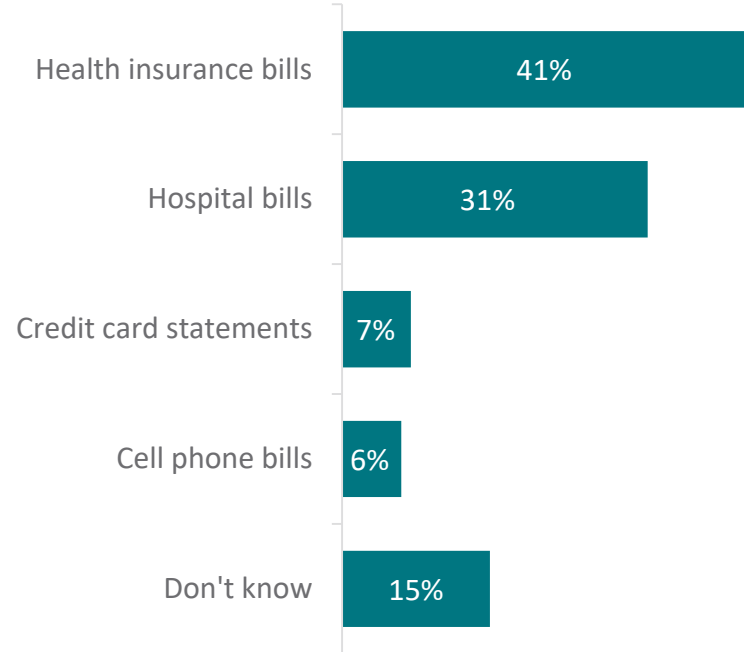


Q8 When using health care, do you find each of the following frustrating or not?
 Base: All Respondents (Total n=1730)

Seven out of ten Americans say their health insurance or hospital bills are hardest to understand

Americans say their **insurance bills** are **harder to understand** than their hospital bills, credit card statements, or phone bills.

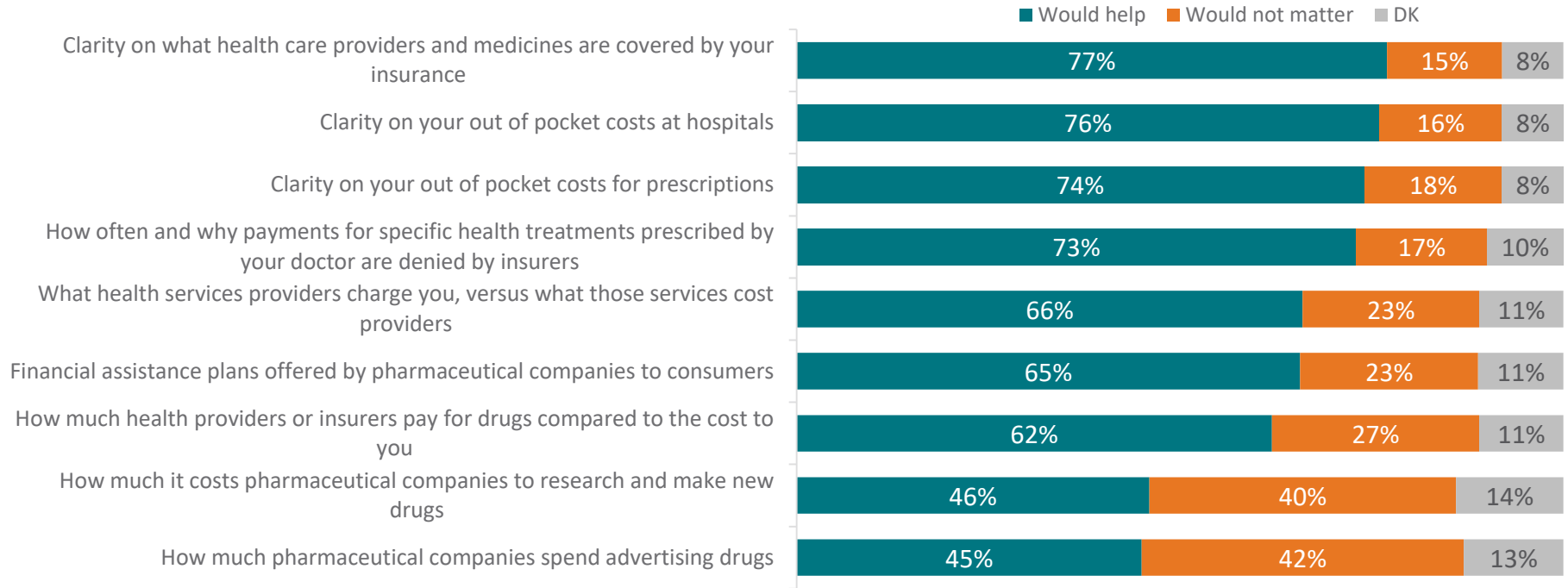
- Gen Xers (76%) and baby boomers (75%) are more likely to struggle with their health insurance or hospital bills than millennials (65%).
- Millennials are statistically significantly more likely to say their credit card statement is hardest to understand (13%) than baby boomers (3%) or gen Xers (5%).



Q4 Which of the following types of documents are hardest to understand?
Base: All Respondents (Total n=1730)

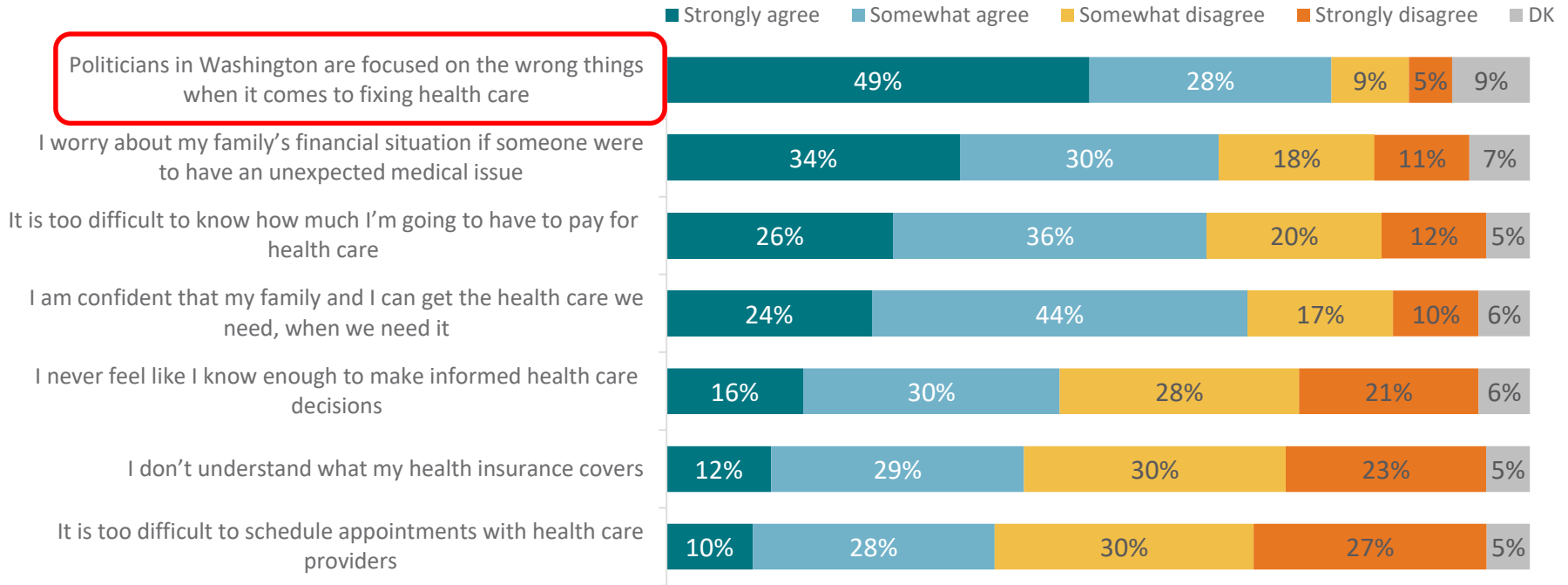
© 2018 Ipsos

Americans desire for more clarity and transparency within the health care industry



Q9 Would having more information about the following parts of health care help you make decisions about your care or would it not matter much?
 Base: All Respondents (Total n=1730)

Americans want politicians to take a new approach to fixing health care

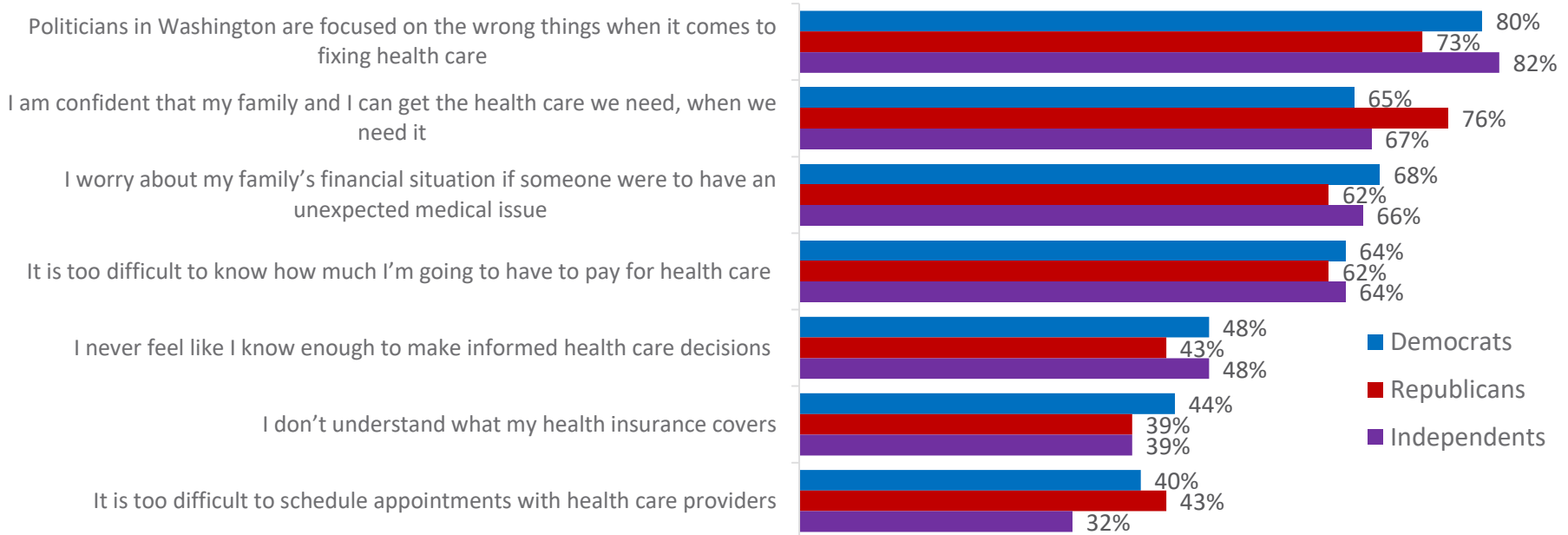


Q7 Do you agree or disagree with the following statements?

Base: All Respondents (Total n=1730)

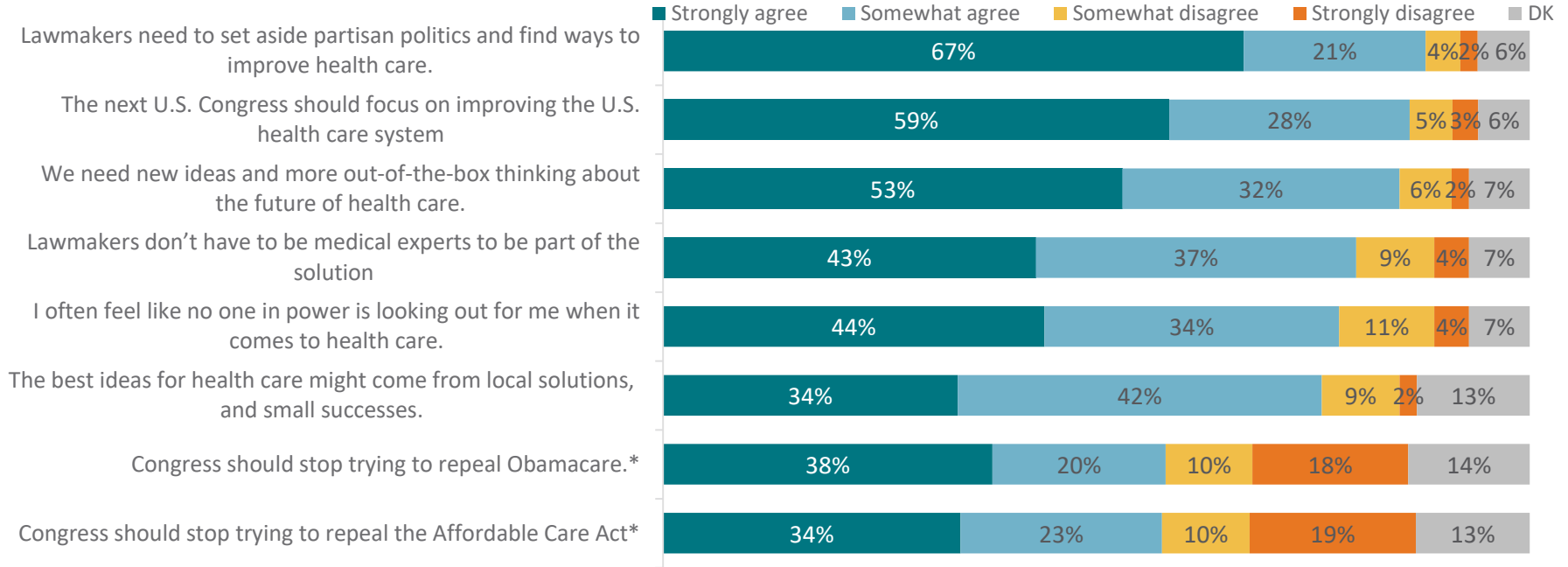
© 2018 Ipsos

Republicans and Democrats believe policymakers are focusing on the wrong things to improve healthcare



Q7 Do you agree or disagree with the following statements? *Strongly/Somewhat Agree (net)
Base: All Respondents (Democrats n=770, Republicans n=425, Independents n=393)

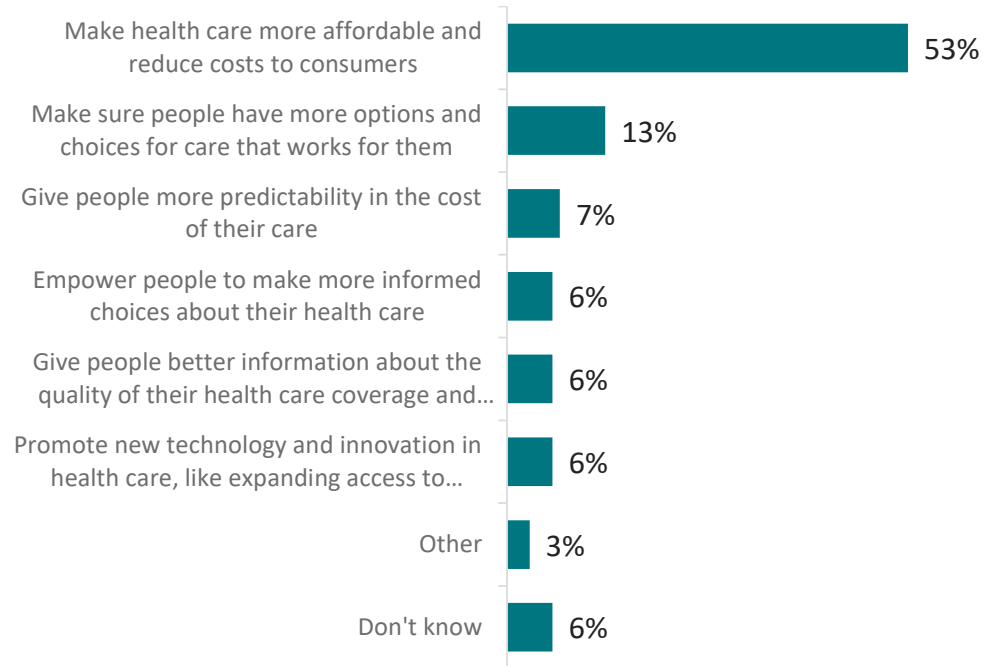
Americans want new ideas and solutions for fixing US health care



Q14 Do you agree or disagree with the following statements?
 * These two statements were split sampled
 Base: All Respondents (Total n=1730)
 © 2018 Ipsos

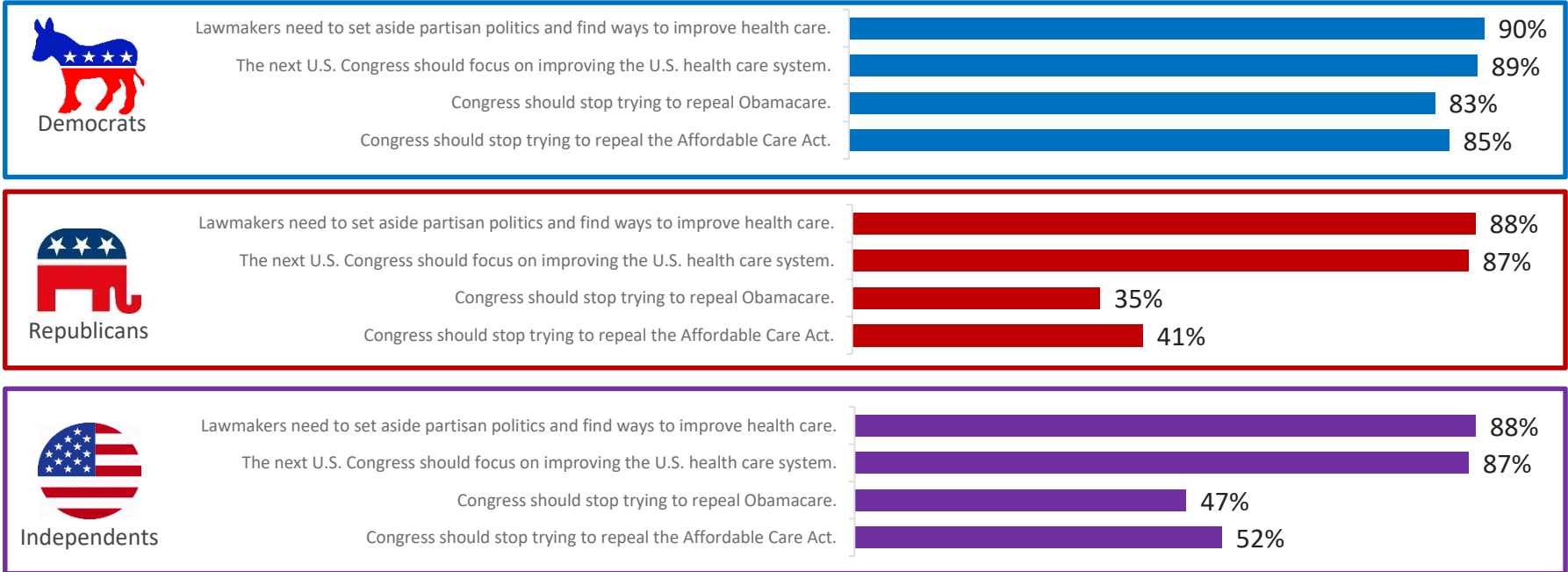
Americans express a clear preference for health care policy changes that focus on lowering the cost to users

About half of Americans say making health care more **affordable and reducing costs** should be the top priority for improving health care within the next five years. The next most often cited issue was making sure people had more options and choices at just 13%.



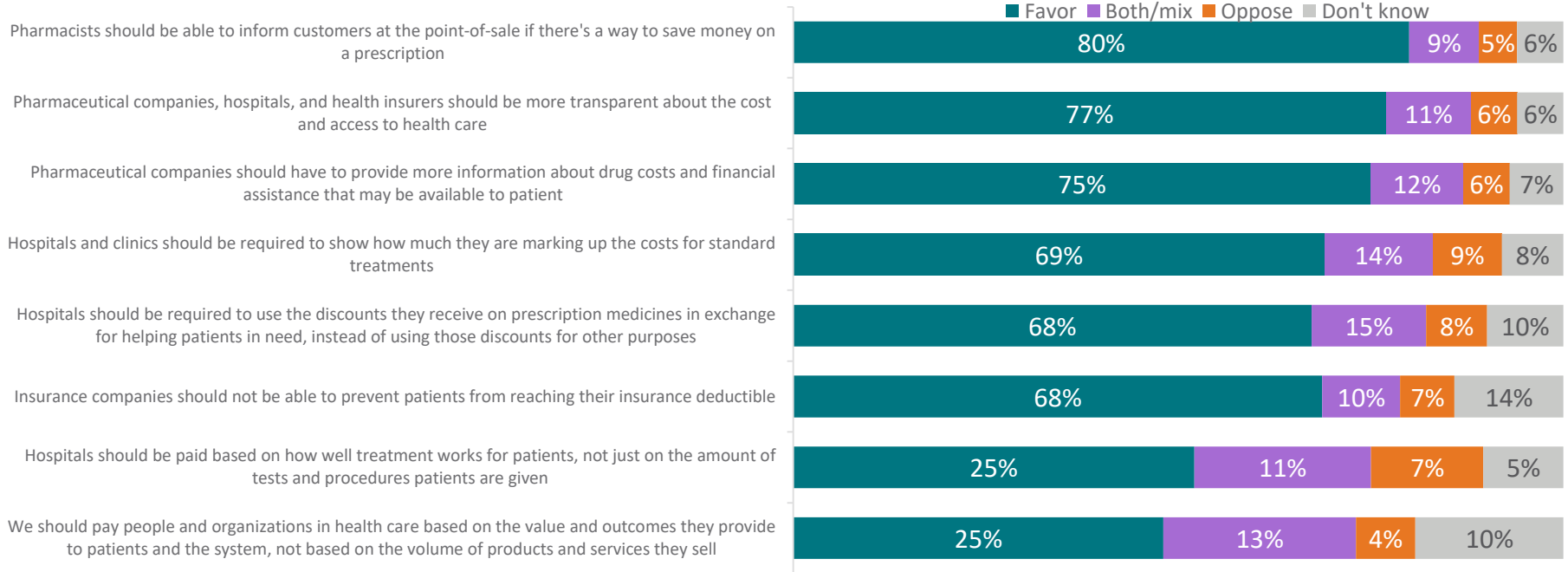
Q10 From the following list, what do you think should be the priority to make health care better in the next 5 years?
Base: All Respondents (Total n=1730)

Americans want to set aside partisan differences to fix US health care



Q14 Do you agree or disagree with the following statements? *Strongly/somewhat agree
Base: All Respondents (Democrats n=770, Republicans n=425, Independents n=393)

This focus on health care costs is reflected in the policy preferences of the supermajority of Americans



Q15 Here are some proposals for changing the health care system. For each of these, would you favor or oppose this policy?
 Base: All Respondents (Total n=1730)

Contacts



Chris Jackson
Vice President

✉ Chris.Jackson@ipsos.com

📞 202.420.2025



Jennifer Berg
Senior Account Manger

✉ Jennifer.Berg@ipsos.com

📞 312.526.4224

ABOUT IPSOS

Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multi-specialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist – NYSE – Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

www.ipsos.com

GAME CHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” – our tagline – summarises our ambition.