



Health Care Experience

Ipsos survey conducted on behalf of Consumers for Quality Care

Summary of Findings

Main findings

Health care is a major political issue for Americans in the upcoming midterm election. Clearly, Americans want to see elected officials make improving health care a higher priority. However, Americans do not expect elected officials to be the only ones improving health care; they also see the health industry itself playing a significant role in this improvement.

A broad bipartisan majority of Americans want the health care industry to change and overwhelmingly express a desire for reform that will lower the cost to patients. The out-of-pocket cost of health care is fundamentally the most frustrating part of health care for Americans, and they would also like to see more clarity and transparency in the health industry. Ultimately, there are several straight-forward, bipartisan outcomes that voters want that the next Congress and key players in the health care industry could make reality.

Midterm Election

Politicians on both sides of the aisle are asking Americans to vote in November, but what changes do Americans want to see coming out of the upcoming midterm elections? Among all Americans, health care and the economy are the two most important issues for the midterm election with health care appearing to be a slightly higher priority with 28% of Americans ranking the issue at number one compared to the 23% of Americans putting the economy in the top spot. Health care is a higher priority for some generation groups than others. Health care is more often a top issue for older Baby Boomers (66%) and Gen Xers (45%) than for Millennials (31%). Health care is most often reported as a top two issue among White (53%) and African Americans (58%), while about one-third of Hispanics (32%) say the same.

Cost of Health Care

Why does health care seem to strike such a chord with Americans? The first and foremost concern for Americans is the cost associated with health care. Approximately two in three Americans report agreement that they worry about their family's financial situation if someone were to have an unexpected medical issue (65%).

The top four most frustrating issues for Americans when using health care support their concerns about cost as well. Hospital fees and unexpected bills are the most frustrating issue for Americans (74%), followed by insurance costs (71%), out-of-pocket costs for prescriptions (64%), and out-of-pocket costs for routine visits to doctors (63%).

Further compounding the financial issues related to healthcare, two in three Americans say they struggle with predicting how much they will have to pay for health care when they need it. This issue seems to stem from the complicated nature of the health care industry as a whole.



Americans don't seem to understand what their insurance does and doesn't cover and how costs for services are determined.

Getting health care seems to be a lower frustration point for Americans compared to health care costs. Among a list of frustrating health care related issues, just under half of Americans report obtaining health insurance as a frustration (48%). This frustration is followed by not knowing what kind of health care provider to see (51%) and not being able to get a specialist appointment (55%).

A supermajority of Americans (77%) report a desire for seeing increased clarity on what health care providers and medicines are covered under their insurance. Additionally, about three in four Americans desire more clarity on their out-of-pocket hospital costs (76%), their prescription costs (74%) and how often and why payments for some prescribed treatments are denied by insurers (73%). Opportunities to mitigate these concerns could be more transparency in how consumer costs are determined and to simplify bills related to the health care industry. The vast majority of Americans report either health insurance bills (41%) or hospital bills (31%) are more confusing compared to their credit card statement (7%) or cell phone bill (6%).

Universal Desire for Change

An important observation is the disconnect between how much the American public perceives elected officials prioritizing health care and how much they think elected officials should prioritize health care. Americans strongly believe that health care reform should be either a major or top priority for elected representatives (84%), however, a smaller proportion (56%) of Americans believe politicians are treating the issue as such. In fact, about three in four Americans believe that Washington's politicians are focused on the entirely wrong things when considering health care reform (77%).

The desire for health care reform is non-partisan. The vast majority of both Democrats (90%) and Republicans (88%) report a desire to see lawmakers set aside partisan politics to find ways to improve health care. Additionally, the majority of Democrats (91%) and Republicans (78%) agree that reforming health care should be either a major or top priority for elected officials.

Americans, on a bipartisan basis, want policymakers to pursue solutions that provide more transparency, about costs and more information about patient assistance programs. Americans want policies to: inform customers at the point-of-sale if there was a way to save money on a prescription (80%), increase transparency from pharmaceutical companies, hospitals, and health insurers about the cost and access to health care (77%), require pharmaceutical companies to provide more information about drug costs and financial assistance that may be available to patients (75%), and require hospitals and clinics to show how much they are marking up the costs for standard treatments (69 percent).

Although politicians are held responsible for health care reform in the news, Americans are more likely to point to private sector industry groups as the most significant players in improving health care. Hospitals (75%), insurance and pharmaceutical companies (72%), and medical professionals



(72%) are the three most commonly reported agents as having a significant role in improving health care. Political figures such as Congress (69%), state policymakers (67%), patient advocacy groups (60%) and President Trump (57%) are cited slightly less often, though still thought to be important in the minds of Americans in leading future health care improvement.

Conclusion

Health care is a clear top priority for Americans, and there is a desire to see collaboration between both politicians and health care providers in finding ways forward. The issue is a non-partisan one, opening the door to policy reform without heavy political discourse. Americans hope to see their health care become cheaper and easier to understand and predict. While health care is reportedly an extremely important issue, the general public seems lukewarm in their optimism for positive future change in health care with just 40% reporting optimism towards health care's future and just 30% reporting optimism regarding the future of politics and the government.



About the Study

These are findings from an Ipsos poll conducted October 4-11, 2018 on behalf of GSG and CQC. For the survey, a sample of roughly 1,730 adults 18+ from the continental U.S., Alaska and Hawaii were interviewed online in English. The sample includes 811 Whites, 401 African Americans, and 482 Hispanics.

The sample for this study was randomly drawn from Ipsos' 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 a 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 2013 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 percentage points).

The poll also has a credibility interval of plus or minus 3.9 percentage points for Whites, 5.6 percentage points for African Americans, and 5.1 for Hispanics.

For more information about conducting research intended for public release or Ipsos' online polling methodology, please visit our [Public Opinion Polling and Communication](#) page where you can download our brochure, see our public release protocol, or contact us.

For more information on this news release, please contact:

Chris Jackson
Vice President, U.S.
Ipsos Public Affairs
+1 202 420-2025
chris.jackson@ipsos.com



About Ipsos Public Affairs

Ipsos Public Affairs is a non-partisan, objective, survey-based research practice made up of seasoned professionals. We conduct strategic research initiatives for a diverse number of American and international organizations, based not only on public opinion research, but elite stakeholder, corporate, and media opinion research.

Ipsos has media partnerships with the most prestigious news organizations around the world. In Canada, the U.S., UK, and internationally, Ipsos Public Affairs is the media polling supplier to Reuters News, the world's leading source of intelligent information for businesses and professionals. Ipsos Public Affairs is a member of the Ipsos Group, a leading global survey-based market research company. We provide boutique-style customer service and work closely with our clients, while also undertaking global research.

About Ipsos

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks third in the global research industry.

With offices in 88 countries, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media, customer loyalty, marketing, public affairs research, and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,780.5 million in 2016.

GAME CHANGERS

« Game Changers » is the Ipsos signature.

At Ipsos we are passionately curious about people, markets, brands and society.
We make our changing world easier and faster to navigate and inspire clients to make smarter decisions.
We deliver with security, speed, simplicity and substance. We are Game Changers.

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