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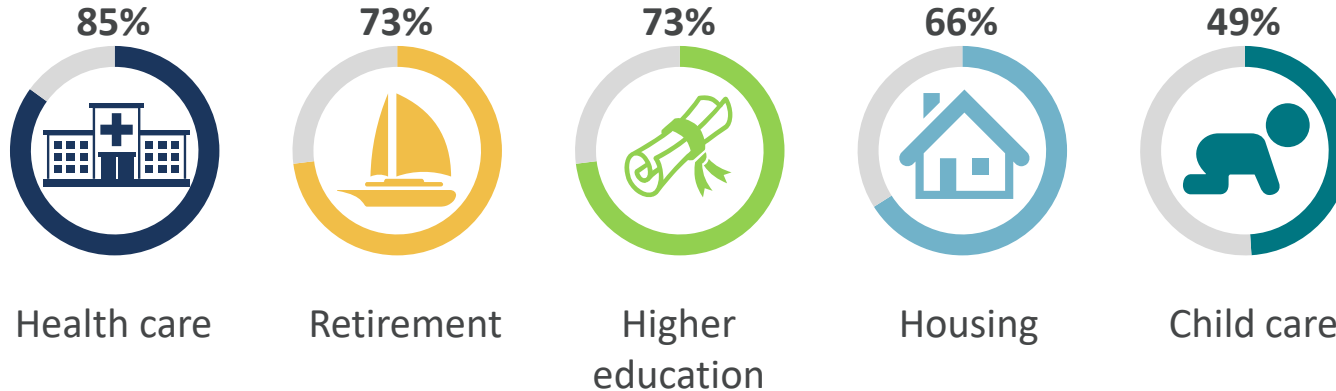
# Executive summary

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- Americans are acutely worried about paying for health care – even more than they worry about costs associated with retirement, college, housing, or child care.
- What people pay is the main pain point: Americans are more concerned about premiums, deductibles, and co-pays than they are about access to care or quality of care.
- When asked who is responsible for their out-of-pocket costs, Americans mostly blame insurance companies, pharmaceutical companies, and the federal government.
- Although the majority of Americans are able to get health care when they need it, there are troubling indicators about quality and access.
- Regardless of political persuasion, Americans share common frustrations about their health care, and have shared priorities for change.

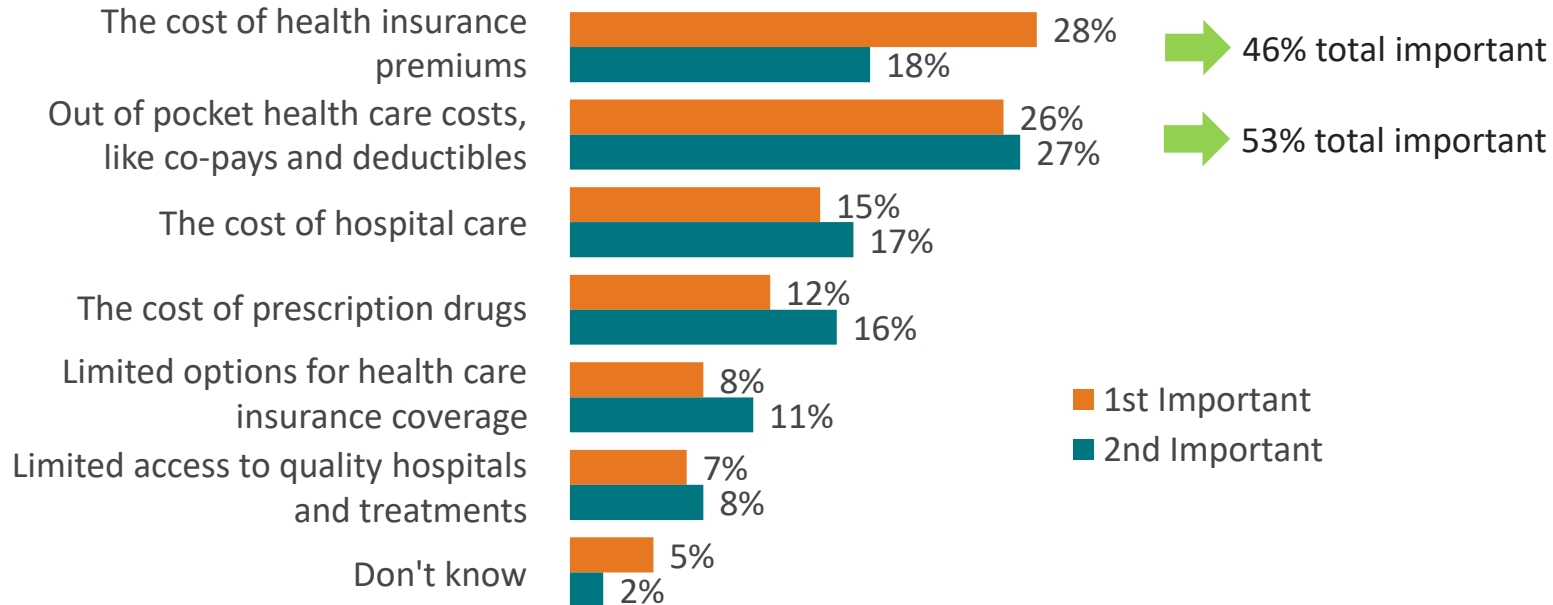
# A large majority of Americans are concerned about the cost of health care – more so than paying for retirement, college, housing, and child care

Percent very/somewhat concerned



Q1 How concerned are you, if at all, with the costs of the following: [ITEM] Are you very concerned, somewhat concerned, somewhat unconcerned, or very unconcerned? Base: All Respondents (Total n=1700)

# Premiums, co-pays, deductibles are top concerns for many Americans



Q3 From the following list, which health care issue is most important to you?  
 Q4 And from the same list, which health care issue is the second most important to you? Base: All Respondents (Total n=1700)

# Americans see insurance and Rx companies as most responsible for health care costs

<u>Perceived as Responsible for Out of Pocket Costs</u>	<u>Democrat</u>	<u>Republican</u>	<u>Independent</u>
Health insurance companies <b>47%</b>	48	48	47
Pharmaceutical companies <b>43%</b>	42	42	45
The Federal government <b>36%</b>	35	32	38
Hospitals <b>21%</b>	20	25	22
Pharmacists <b>8%</b>	11	7	5
Pharmacy benefit managers <b>6%</b>	5	2	8
DK/Refused <b>5%</b>	5	4	5

Q7 From the following list, which TWO do you think are most responsible for the costs that you pay out of pocket for health care? Base: All Respondents (Total n=1700)

# There are troubling indicators about trust in the system, quality, and access

## Percent of Americans who Agree...

		<u>Private</u>	<u>Medicare</u>	<u>Medicaid</u>	<u>VA/Mil</u>	<u>Uninsured</u>
Trust my Dr. to put my medical needs above other considerations	<b>87%</b>	88%	91%	86%	78%	73%
Think Dr. feels the need to factor coverage into treatment decisions	<b>64%</b>	64%	64%	66%	65%	65%
Think Dr. options for treatment limited by my coverage	<b>59%</b>	57%	60%	76%	49%	68%

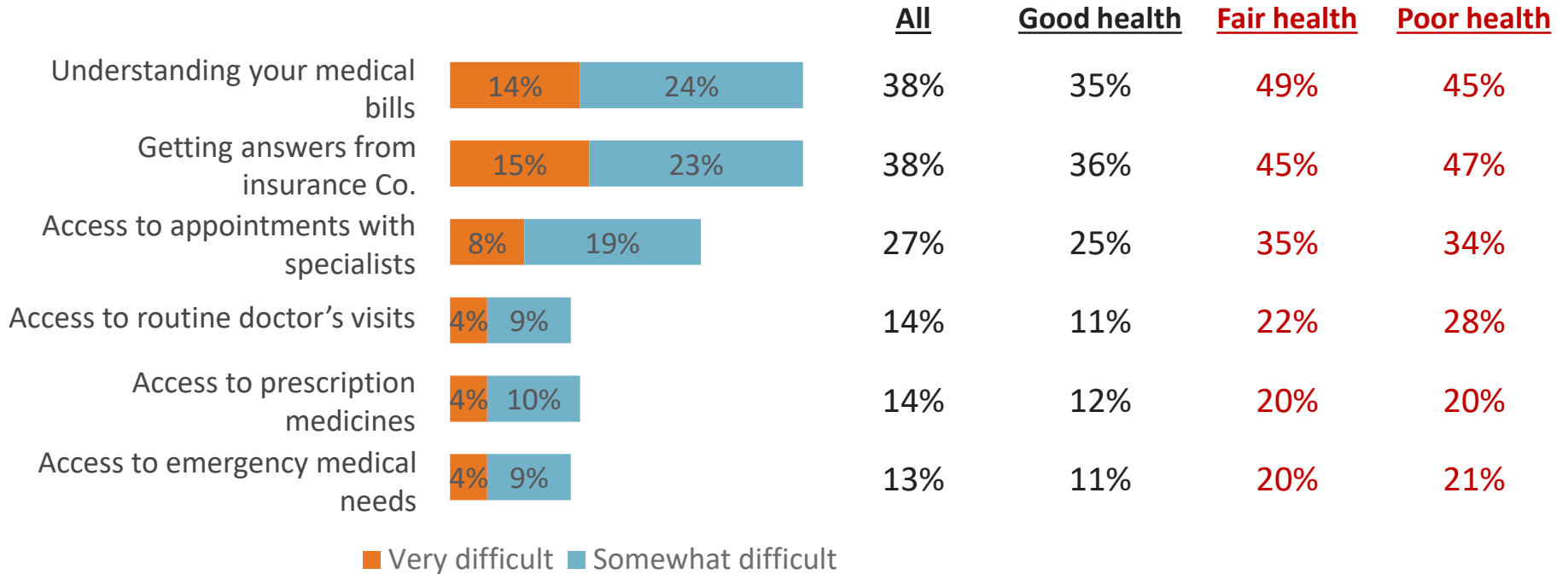
Q14 When it comes to the physician or medical provider that provides most of your care, do you agree or disagree with the following statements. Base: All Respondents (Total n=1700)

# And a clear feeling that coverage benefits are less generous than previously

<u>Percent of Americans who Agree...</u>		<u>Private</u>	<u>Medicare</u>	<u>Medicaid</u>	<u>VA/Mil</u>	<u>Uninsured</u>
More doctors used to accept my insurance	<b>54%</b>	53%	57%	72%	52%	48%
My insurance used to cover more Rx costs	<b>56%</b>	55%	58%	64%	47%	52%
My insurance used to cover more services	<b>57%</b>	58%	57%	58%	42%	55%

Q14 When it comes to the physician or medical provider that provides most of your care, do you agree or disagree with the following statements. Base: All Respondents (Total n=1700)

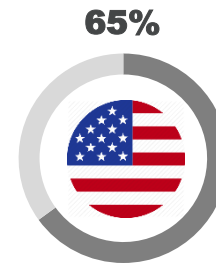
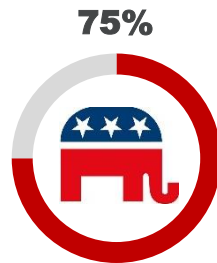
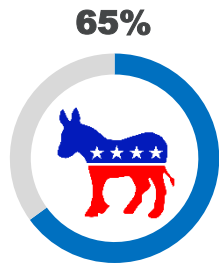
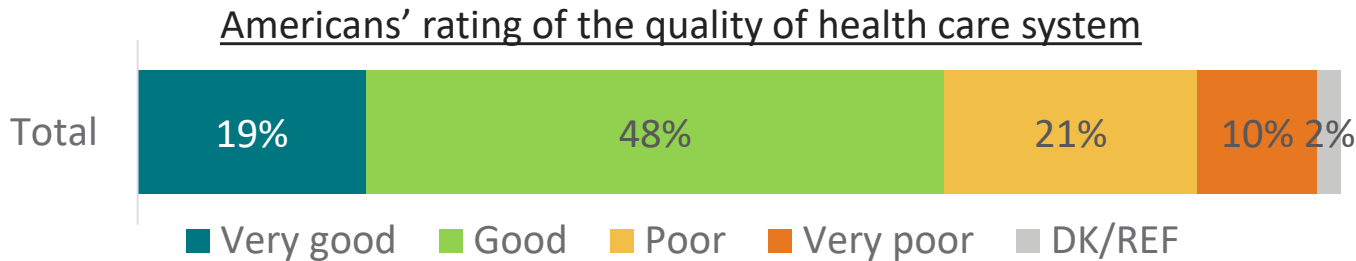
# Top health care frustrations include difficulty understanding medical bills, getting answers, and accessing specialists



Q8 Thinking about your health care in general, how easy would you say [ITEM] is? Would you say it is very easy, somewhat easy, somewhat difficult, or very difficult? Base: All Respondents (Total n=1700)



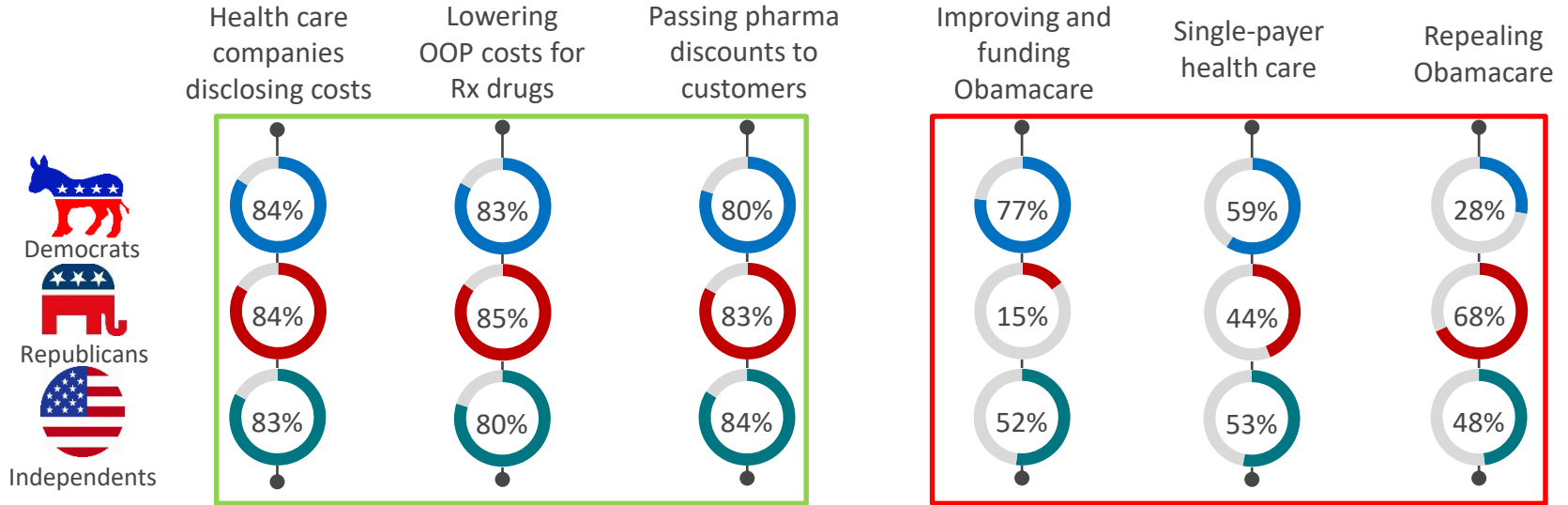
# Regardless of political leaning, Americans rate the quality of health care in the U.S. similarly



Q2 Thinking about the health care system in America as a whole, overall, how would you rate the quality of health care in this country? Base: All Respondents (Total n=1700)

# Americans are more likely to vote for a candidate who supports more transparency and lowering out-of-pocket costs

## Would vote for candidates who support....



Q20 I am going to read you a series of statements. For each one, please tell me if it makes you more or less likely to support a candidate for Congress. Base: Split sample (Total n=1700)

*Consumers for*   
**Quality Care**

*[www.Consumers4QualityCare.org](http://www.Consumers4QualityCare.org)*