

HEALTH CARE PERCEPTIONS

Polling Presentation

JANUARY 2022

METHODOLOGY

This poll was conducted between January 14-January 16, 2022 among a sample of 1505 Insured Adults. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 3 percentage points.

KEY FINDINGS

- 1. Insured adults who have employer-provided health care coverage are more likely to rate their care positively than those with Marketplace coverage.** Those with employer-provided health coverage rate their care 19% more positively than those with coverage through the marketplace. Moreover, those with employer coverage are also 31% more likely to rate their care more positively in comparison to the health care system overall. Furthermore, a majority of those who receive their care through the marketplace report they would be likely to switch to an employer-provided plan if they had the opportunity.
- 2. Most insured adults are concerned with the cost of health care, prescription drugs, and the ability to pay for a major health event.** To this end, when asked what should be made the single most important priority when it comes to health care reform, a majority of insured adults agreed that it should be reducing health care costs.
- 3. Insured adults believe that the U.S. health care system is struggling with respect to matters of cost.** Insured adults find the U.S. health care system inspires *innovation, provides a choice in care, and offers high quality treatment* but finds that it is underperforming areas such as *affordability and transparency*.
- 4. Nearly two-thirds of insured adults feel the U.S. should take “modest” action to fix and improve the health care system rather than large scale changes.** A majority of Democrats, independents, and Republicans all agree that the U.S. should take “modest” action.
- 5. Three quarters of insured adults support affordable telehealth.** A majority of Democrats, independents, and Republicans all agree that Congress should extend a law that provides flexibility for employers to offer telehealth visits to employees without having to pay their deductible. In addition, more than half of insured adults would seek virtual/online mental health care if it were free.
- 6. Same service—same price:** 72% of insured adults feel the price of health care services should be the same no matter where it is received and 89% of insured adults, across key demographics, feel it is important for regulators to address how patients are charged when receiving a prescription through a hospital clinic rather than a doctor’s office.

AGENDA

GENERAL BENCHMARKS

ENTITIES, COMPARISONS, AND THE ROLE
OF REDUCING COST

MENTAL AND TELEHEALTH

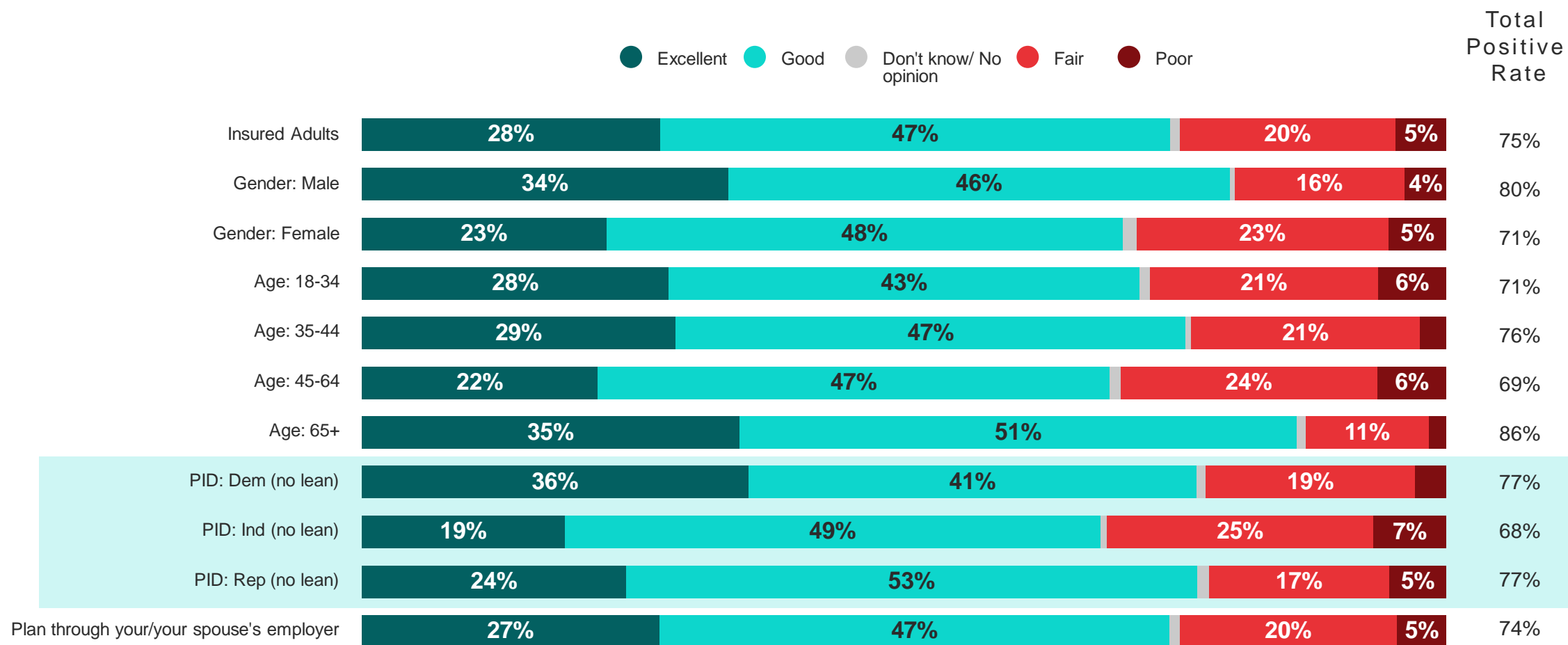
CONGRESSIONAL ACTION



GENERAL BENCHMARKS

Three-quarters of adults with employer-sponsored health insurance rate their plan positively. Additionally, this positive ranking extends across the political spectrum.

How would you rate your **current employer-sponsored** health insurance? N=1178

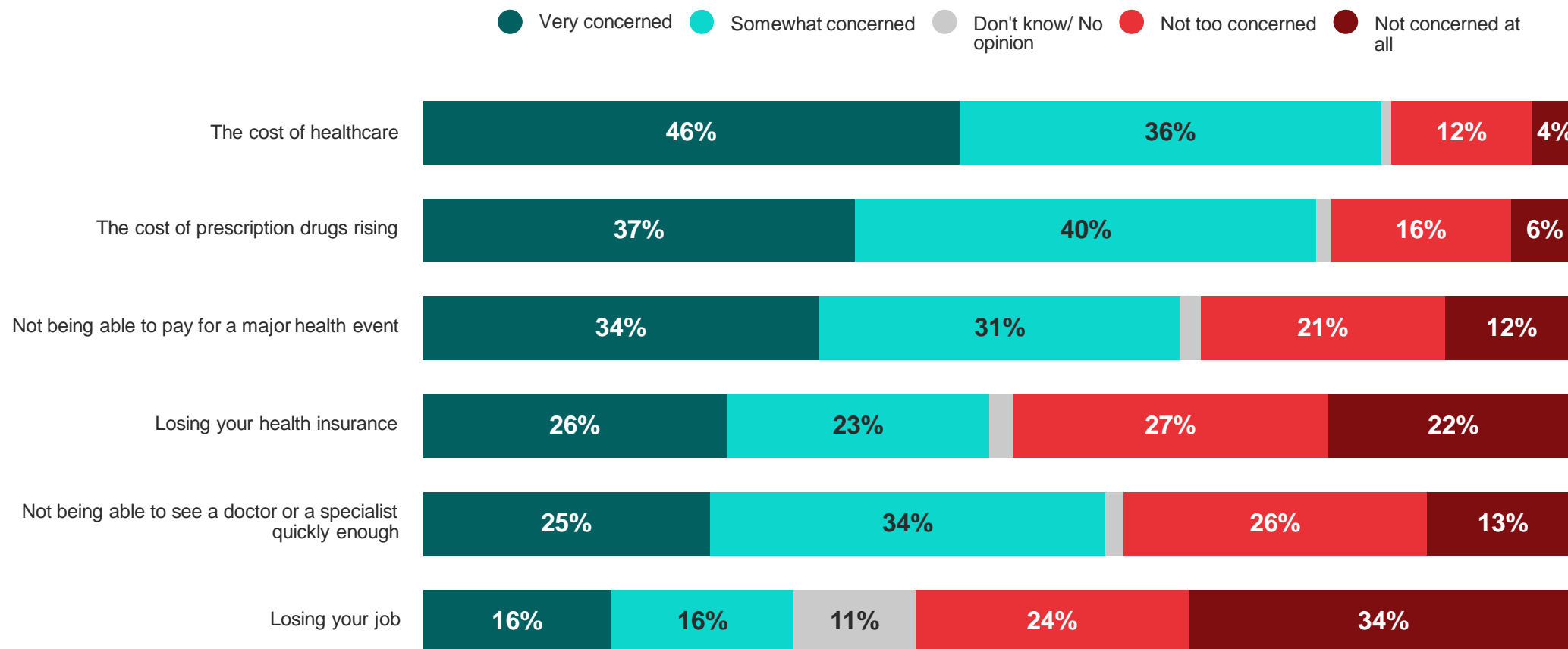


Total Positive Rate = Excellent + Good

GENERAL BENCHMARKS

Most insured adults are concerned with the cost of healthcare, prescription drugs, and the ability to pay for a major health event.

How concerned are you, if at all, about each of the following?



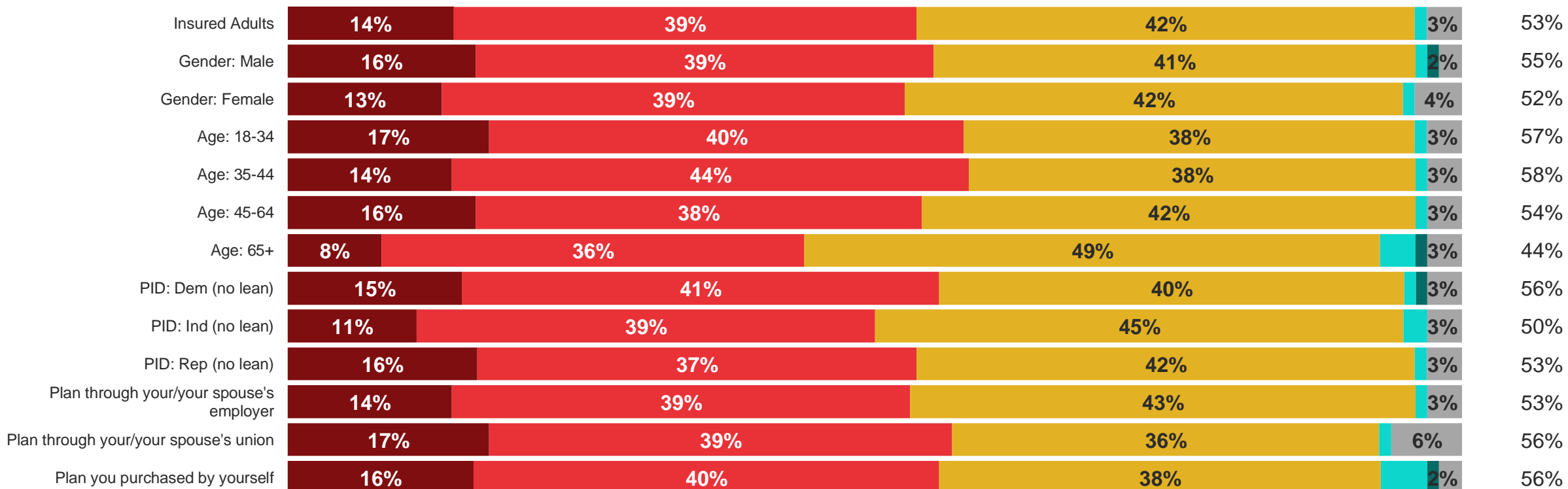
GENERAL BENCHMARKS

More than half adults, across most demographics, indicate the cost of health care for them has increased over the past 12 months.

In the last 12 months, has the cost of health care for you or your household increased, decreased, or stayed about the same?



Total Increase



Total Increase = Significantly + Somewhat increased

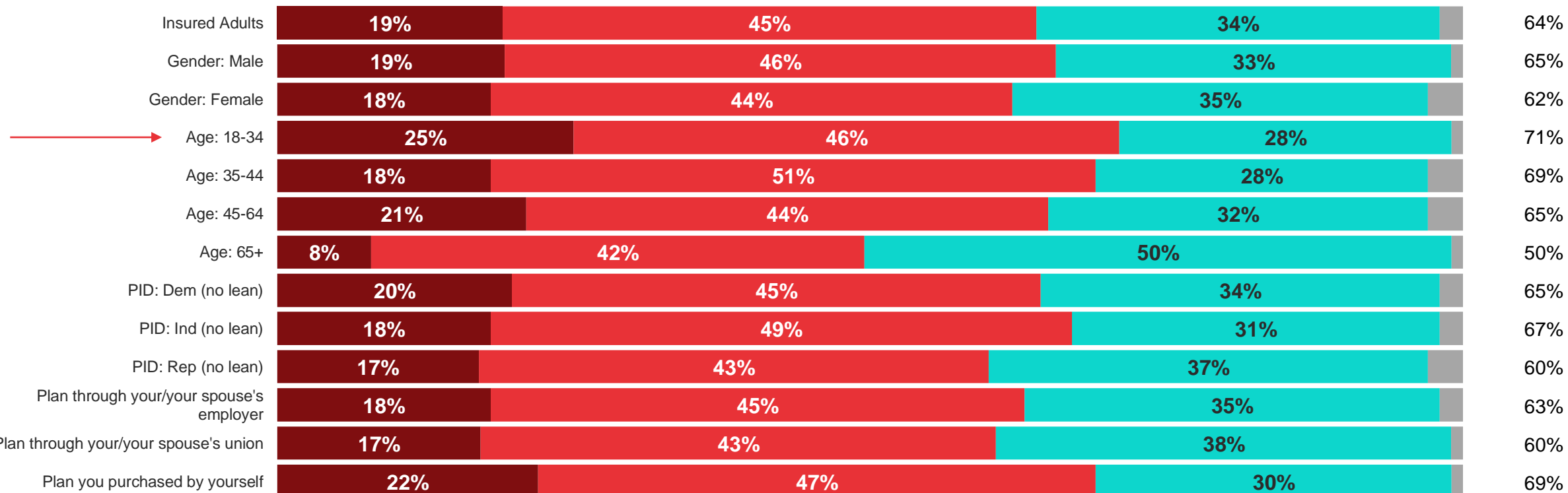
GENERAL BENCHMARKS

A quarter of insured adults aged 18-34 indicate health care costs have presented them and their family a major financial burden.

To what extent are health care costs a financial burden for you and your family?

● Major financial burden
 ● Minor financial burden
 ● Not a financial burden
 ● Prefer not to answer

Total Burden



Total Financial Burden = Major + Minor Financial Burden

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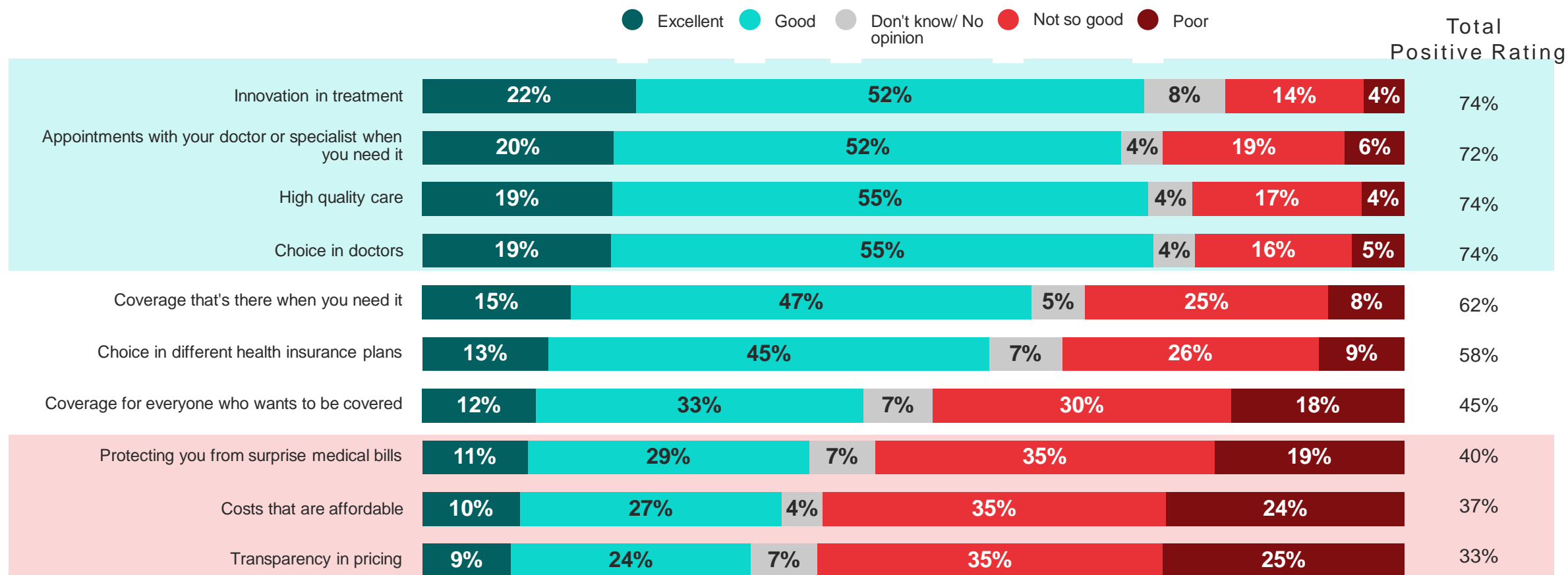
CONGRESSIONAL ACTION



ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Insured adults are most likely to rate *innovations in treatment, appointments, quality, and choice in doctors* most positively in the U.S. healthcare system. Conversely, they are most likely to rate *transparency in pricing, affordability, and surprise medical billing* most negatively.

Below is a list of aspects of the U.S. healthcare system. Please rate each of the following on how well the U.S. healthcare system does for each of the following.

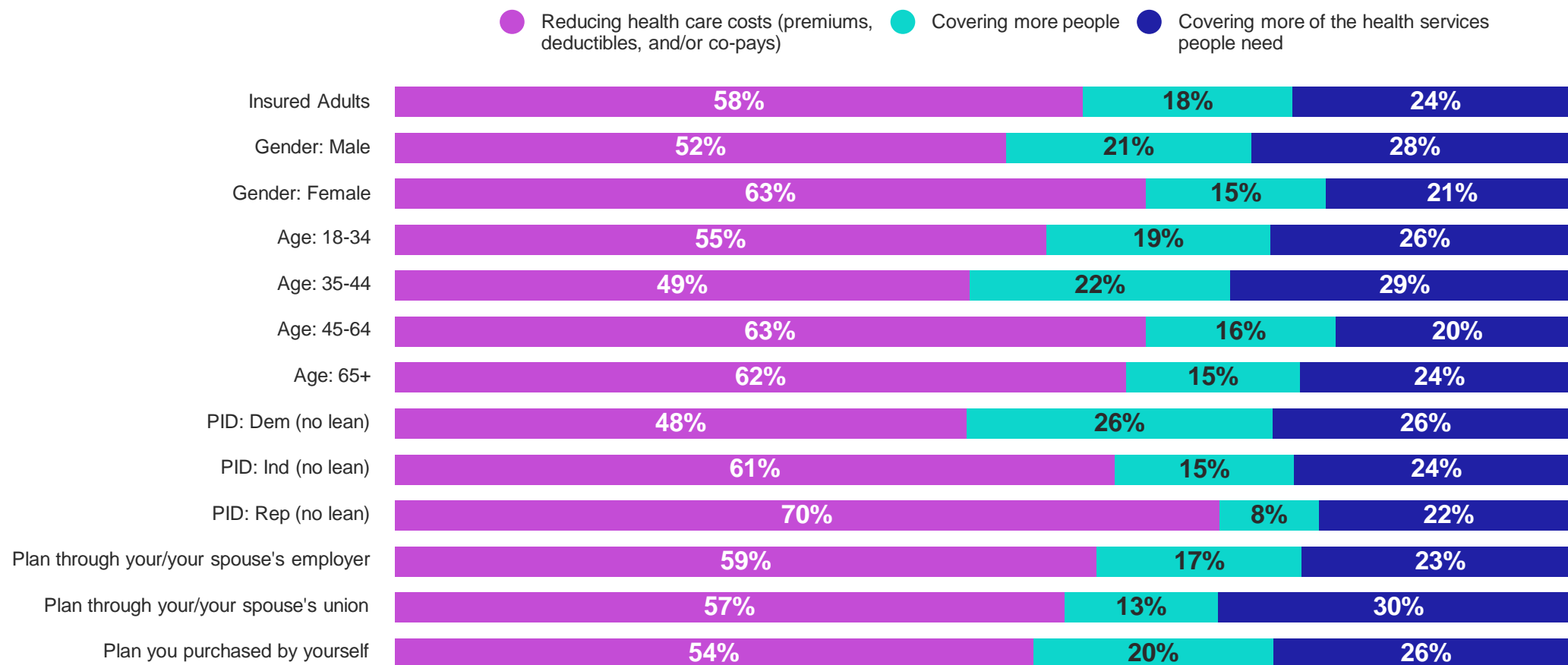


Total Positive Rating = Excellent + Good

ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Insured adults, across key demographics, feel that reducing health care costs should be the single most important priority when it comes to health care reform.

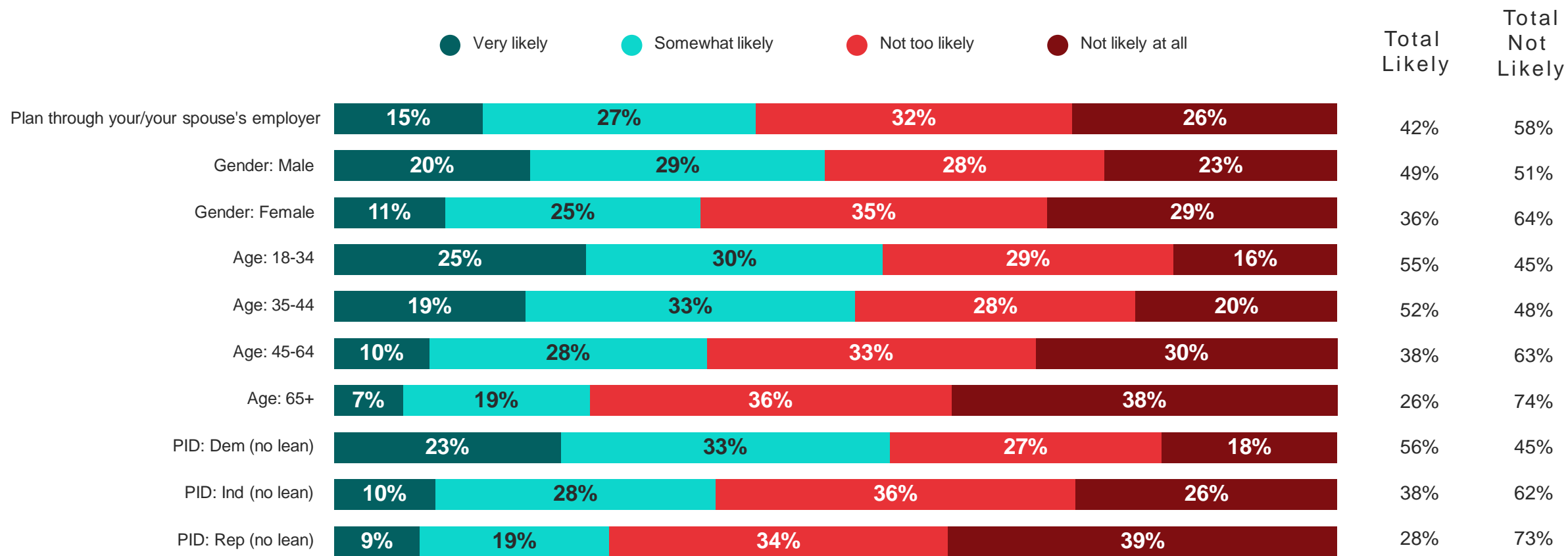
Which of the following should be made the single most important priority when it comes to health care reform?



ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Nearly three in five of those who receive their care through their or their spouse’s employer would be unlikely to switch plans to a government-provided insurance while 42% are likely to switch.

You reported that you received your health insurance through your employer or your spouse's employer. If you had the opportunity to switch your health insurance to a government-provided insurance such as Medicare or Medicaid, how likely would you be to switch plans? **N=1178**

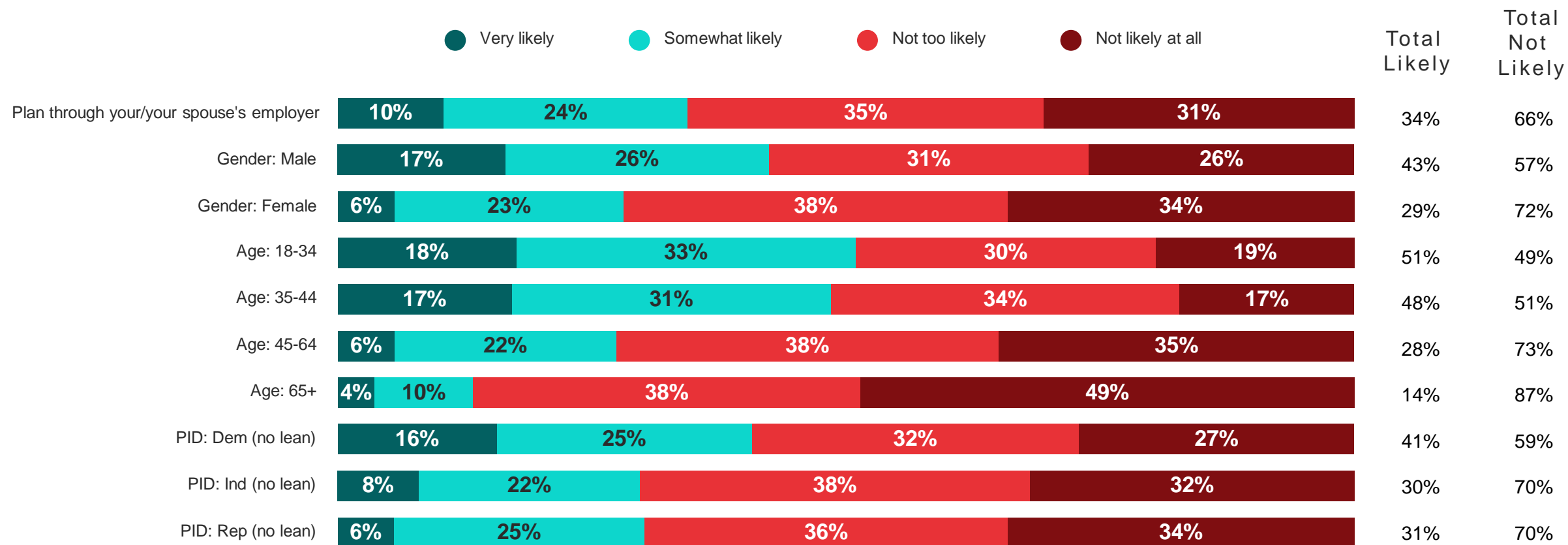


Total Likely= Very + Somewhat likely
 Total Not Likely= Not too + Not likely at all

ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Conversely, those who receive their care through their or their spouse’s employer would be more unlikely to switch to a plan they would have to purchase directly.

You reported that you received your health insurance through your employer or your spouse's employer. If you had the opportunity to switch your health insurance to an individual plan you purchase directly, how likely would you be to switch plans? **N=1178**



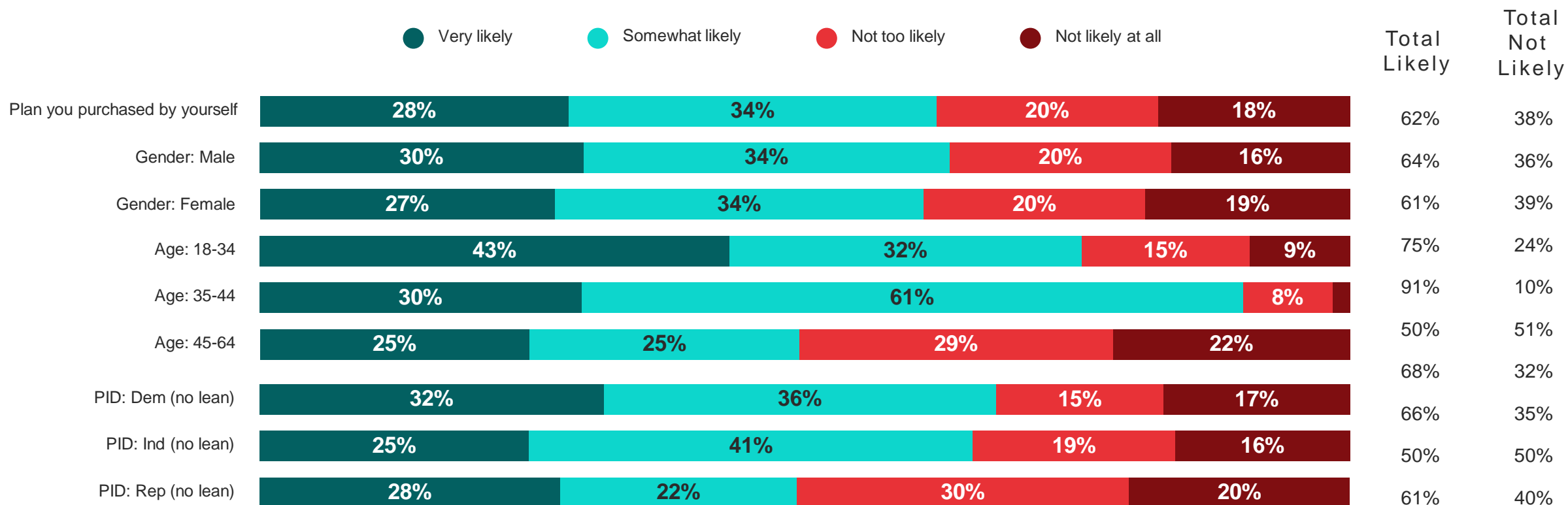
Total Likely= Very + Somewhat likely
 Total Not Likely= Not too + Not likely at all

ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Three in five insured adults who receive their healthcare through a plan they purchased themselves, if given the chance, would likely switch their care to an employer sponsored model.

You reported that you purchased your health insurance yourself through the marketplace/exchange. If you had the opportunity to switch your health insurance to employer-provided coverage, how likely would you be to switch plans? N=261

Very likely Somewhat likely Not too likely Not likely at all

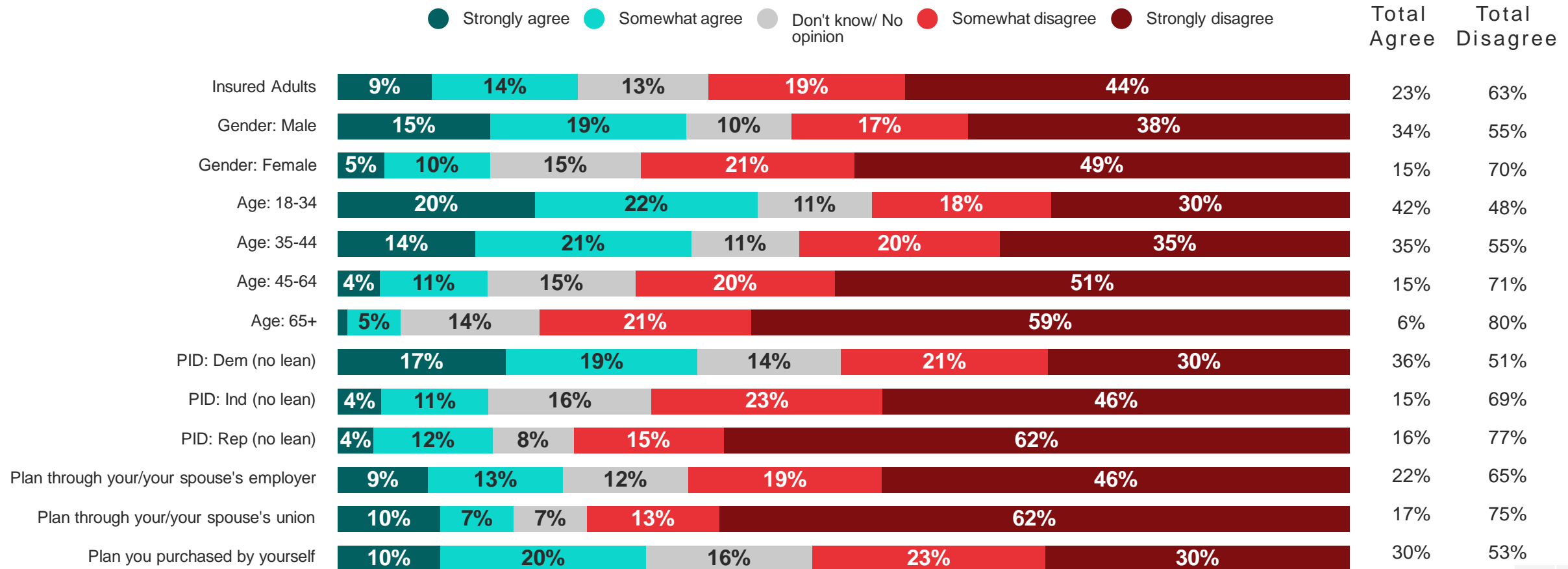


Total Likely= Very + Somewhat likely
 Total Not Likely= Not too + Not likely at all

ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Three in five insured adults disagree with the tested statement. Those who agree most strongly are younger adults and Democrats.

Do you agree or disagree with the following statement: *The government should be allowed to increase prices, effectively shifting costs, to people with private (union or employer-provided) health coverage in order to reduce the costs that people with government provided health coverage receive.*

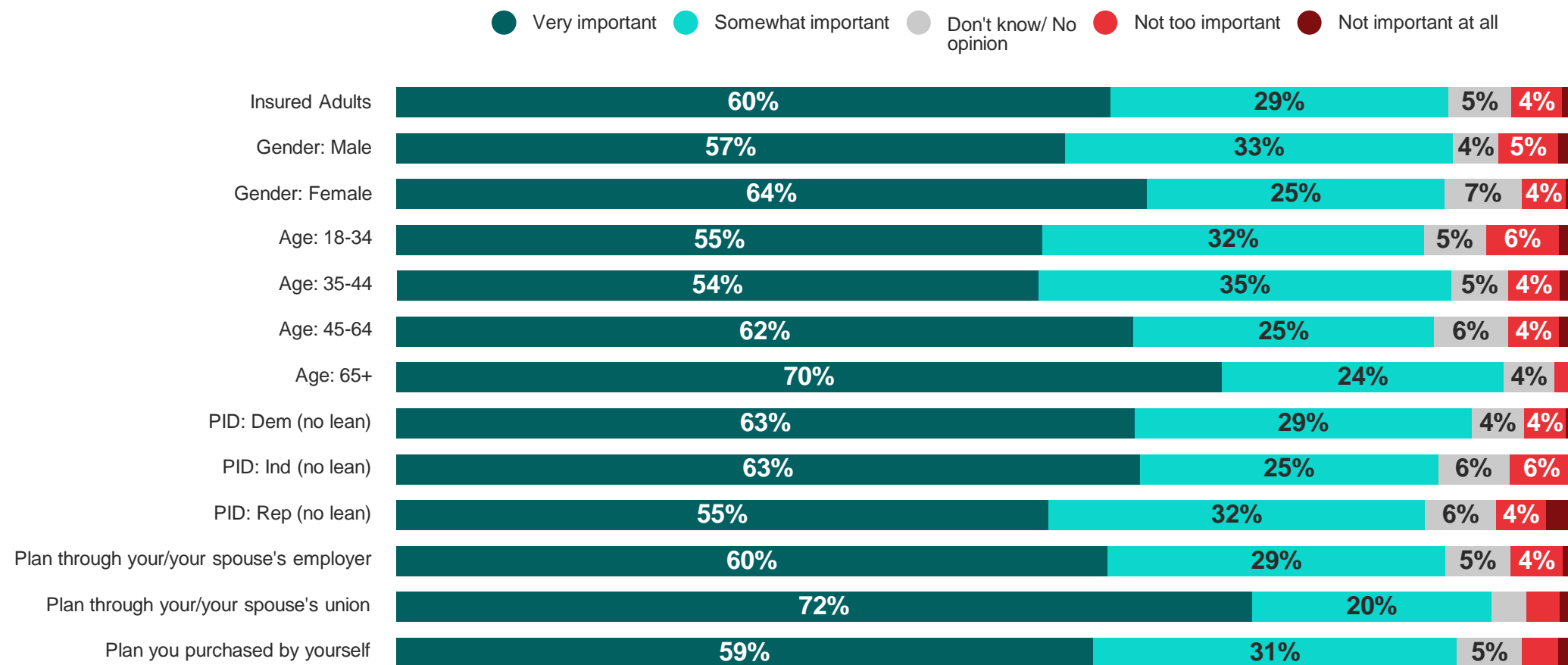


Total Agree = Strongly + Somewhat agree
 Total Disagree = Strongly + Somewhat disagree

ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Insured adults, across key demographics, feel it is very important for regulators to address how patients are charged when receiving a prescription through a hospital clinic rather than a doctor's office.

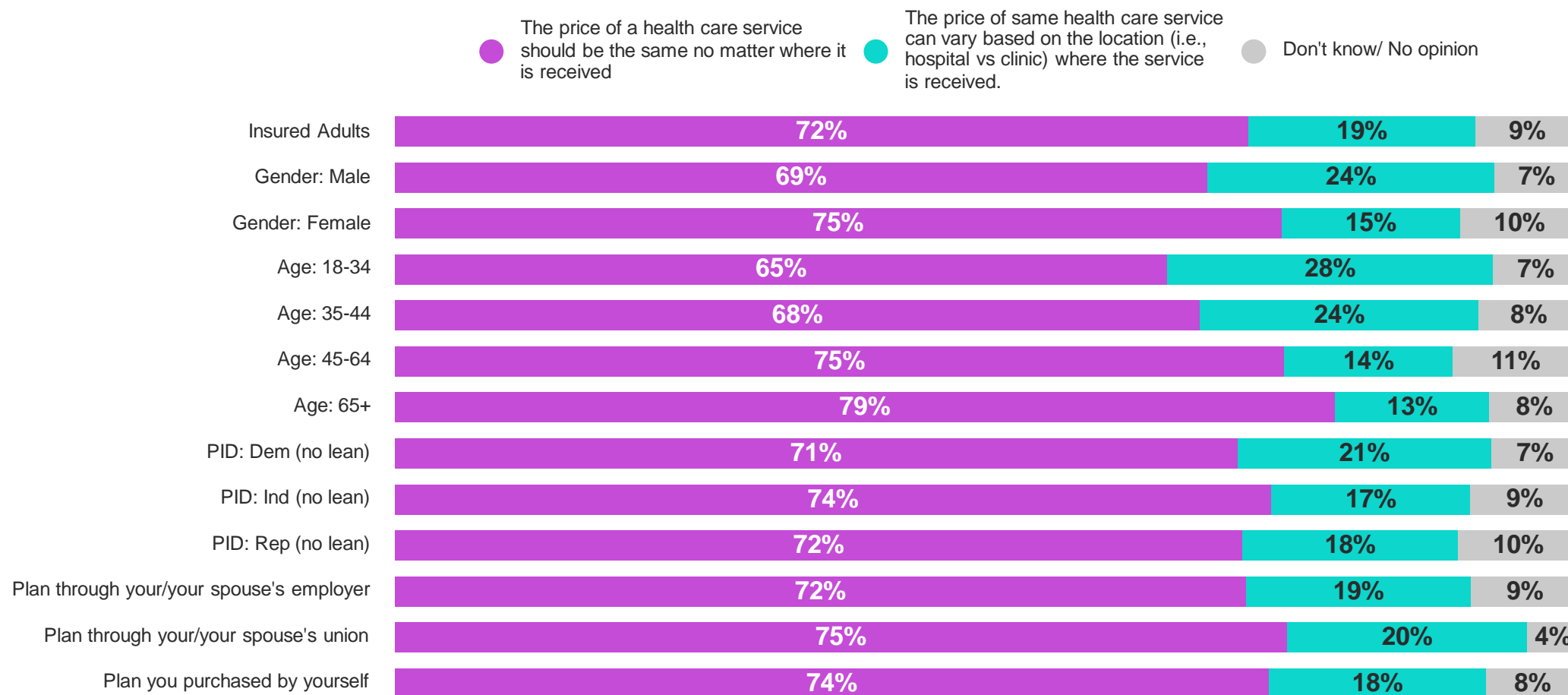
As you may know, a recent study shows that patients may be charged on average 201% more when a prescription is injected at a hospital clinic rather than a stand-alone doctor's office. How important, if at all, is it that regulators address this?



ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST

Seven in ten insured adults feel the price of health care services should be the same no matter where it is received.

Should the exact same health care service be priced differently if it is received in a hospital or if it is received in a doctor's office?



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MENTAL AND TELEHEALTH

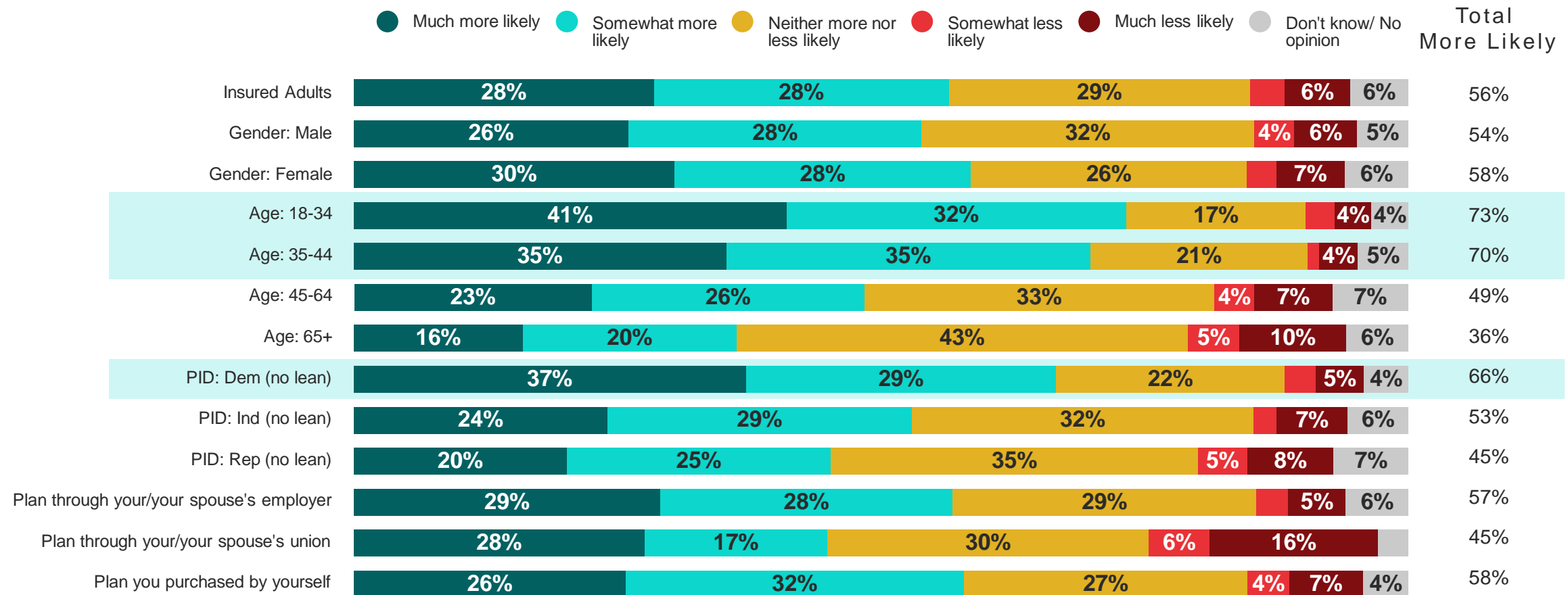
CONGRESSIONAL ACTION



MENTAL AND TELEHEALTH

More than half of insured adults report they would be more likely to seek virtual/online mental health care if it were free. Democrats and younger adults are most likely to report they'd be more likely to access this free service.

How likely would you be to seek virtual/ online mental health care if accessing tele-mental health care services were free?

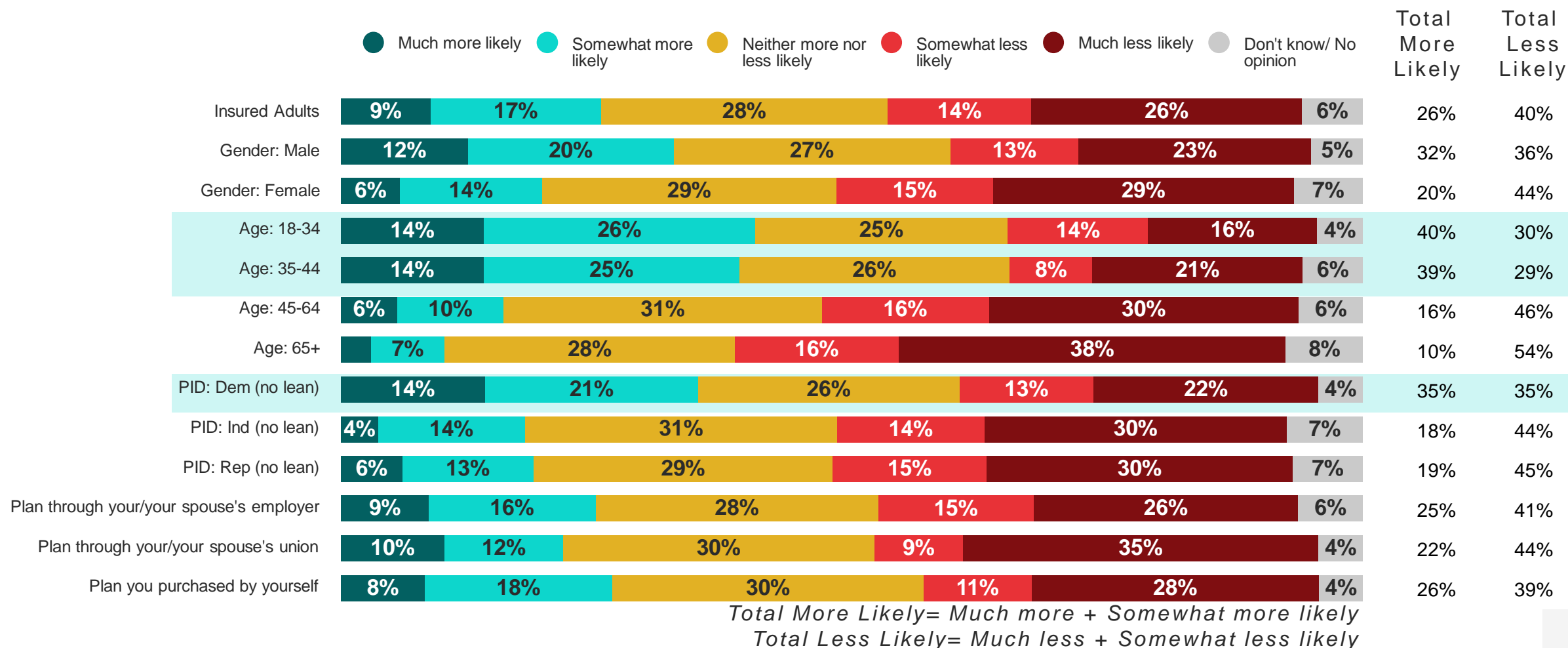


Total More Likely = Much more + Somewhat more likely

MENTAL AND TELEHEALTH

Insured adults are generally less likely to pay \$75 for virtual mental health care. However, those who are more likely, continue to be younger insured adults and Democrats.

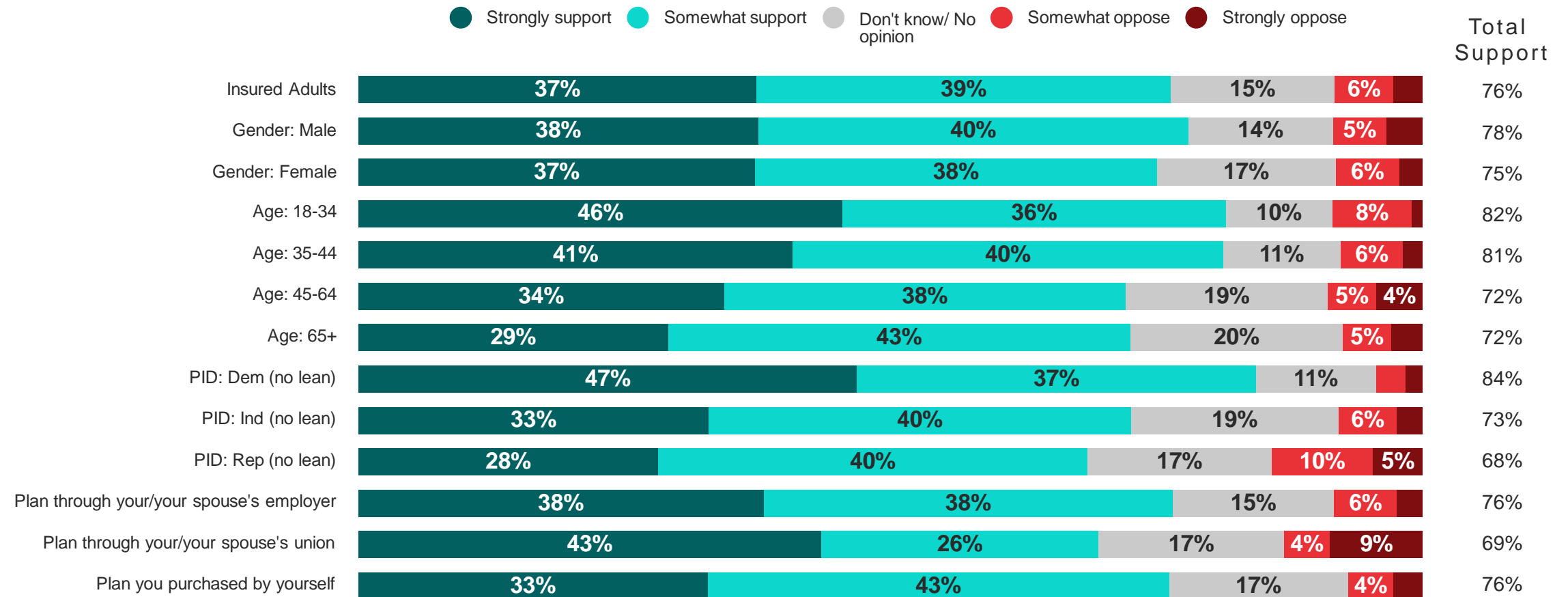
How likely would you be to seek virtual/ online mental health care if accessing tele-mental health care services had a flat \$75 fee?



MENTAL AND TELEHEALTH

Three-quarters of insured adults support extending the law to allow employers to offer telehealth visits to employees without having to pay their deductible.

Do you support or oppose extending the law to allow employers to offer telehealth visits to employees without having to pay their deductible?



Total Support = Strongly + Somewhat support

AGENDA

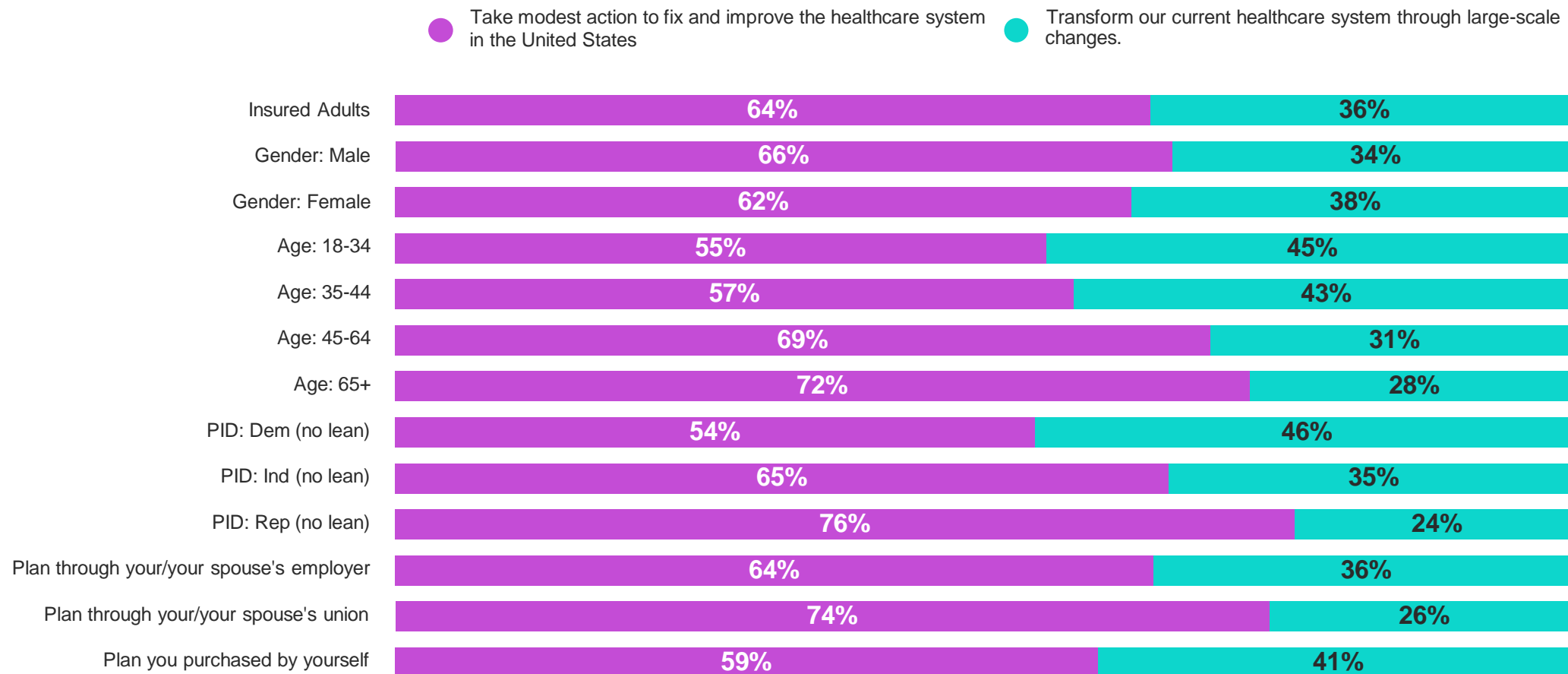
- GENERAL BENCHMARKS
- ENTITIES, COMPARISONS, AND THE ROLE OF REDUCING COST
- MENTAL AND TELEHEALTH
- CONGRESSIONAL ACTION



CONGRESSIONAL ACTION

Nearly two-thirds of insured adults feel the U.S. should take “modest” action to fix and improve the healthcare system. This sentiment is felt by a majority of insured adults across key demographics.

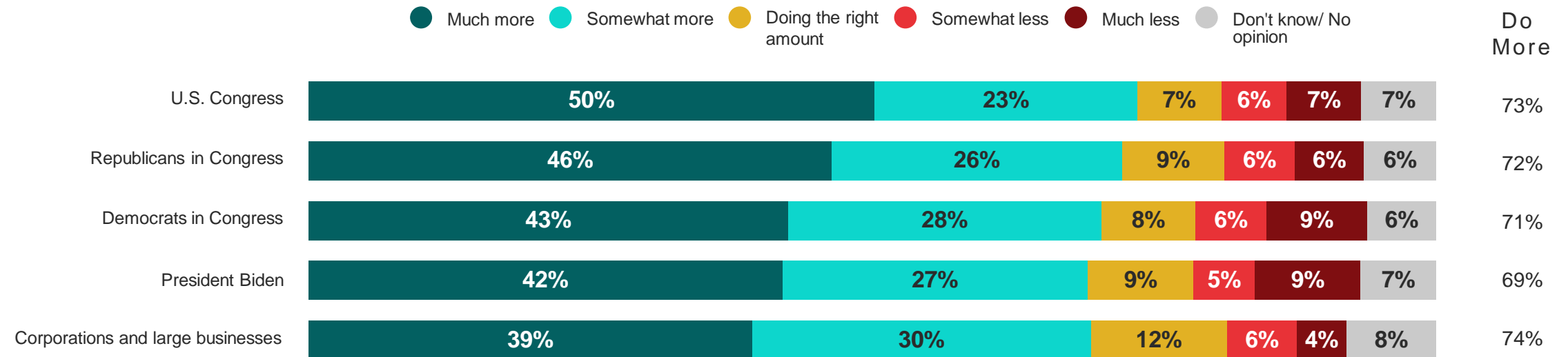
Which of the following approaches to improving the healthcare system in the United States comes closest to your opinion, even if neither is exactly correct?



CONGRESSIONAL ACTION

Seven in ten insured adults feel Congress – both Democrats and Republicans– and President Biden should be doing more to ensure health care costs are affordable. Additionally, three-quarters feel corporations and large businesses should be doing more as well.

Do you feel each of the following should do more or less to ensure that health care costs are affordable? Or are they doing the right amount?

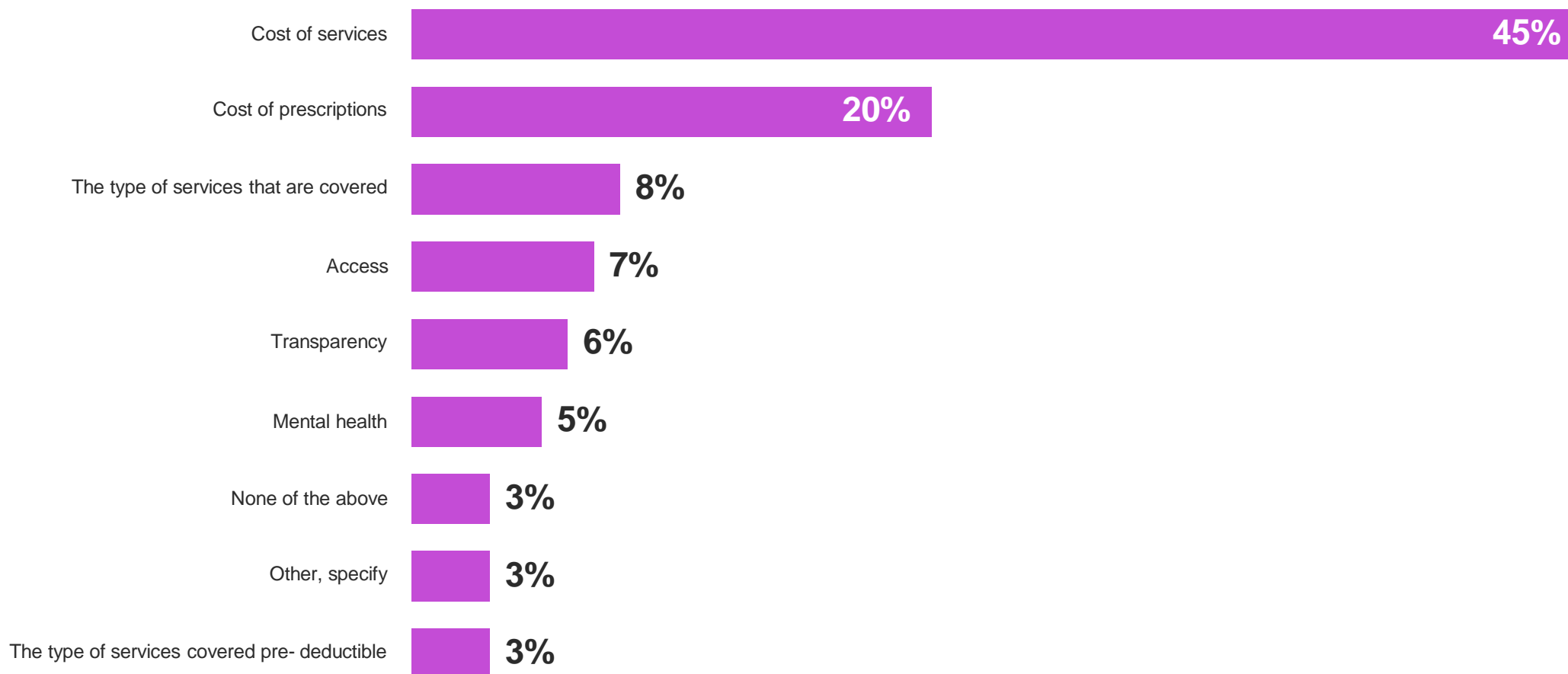


Total Do More= Much + Somewhat more

CONGRESSIONAL ACTION

Of the variables tested, most insured adults want Congress to improve the *cost of service*.

What part of the health care system would you most like Congress to improve?



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