



2019 SURVEY OF

AMERICA'S PATIENTS

An Examination of How Patients Experience
the American Health Care System

Survey conducted on behalf of The Physicians Foundation by Regina Corso Consulting.

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www.physiciansfoundation.org

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Introduction



The health care system should to serve patients before any other stakeholder, improve their health and proactively protect their wellbeing. However, the current environment is not meeting the needs of most Americans. From high costs, to confusion on health policy, to the crippling opioid crisis, patients are faced with more hurdles than ever.

To improve this system, we need to understand the needs of Americans of all ages, races, backgrounds and medical histories. From the impact of societal factors to the physician-patient relationship, patients must be empowered to collaborate with their physicians to receive the right care at the right time.

The Physicians Foundation's *Survey of America's Patients* is conducted on a biennial basis to evaluate American's attitudes on the physician-patient relationship, the cost of health care and key drivers of health care outcomes, such as social determinants of health and the opioid epidemic. With a presidential election underway, we also delved into politics and health care. Every day, presidential candidates are fighting about what patients need, but where are the voices of patients and the physicians who are on the front lines of their care? America's patients should be front and center in the national discourse before any health policy is implemented or overhauled.

With more than 2,000 Americans participating, the survey allows the average patient to reveal their thoughts on our health care system through an extensive questionnaire and in their own words.

We believe the survey offers insights and data that will be of interest to health care professionals, policy makers, academics, journalists and anyone who has seen a physician or is likely to do so. We encourage all those with a stake in health care delivery to read and to reference the survey, and to comment on its findings.

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About The Physicians Foundation



The Physicians Foundation is a non-profit seeking to advance the work of practicing physicians and help them facilitate the delivery of high-quality health care to patients. As the health care system in America continues to evolve, The Physicians Foundation is steadfast in its determination to strengthen the physician-patient relationship and assist physicians in sustaining their medical practices in today's practice environment.

The Foundation pursues its mission through a variety of activities including grant-making, research, white papers and policy studies. Since 2005, the Foundation has awarded numerous multi-year grants totaling more than \$50 million. In addition, the Foundation focuses on the following core areas: physician leadership, physician wellness, physician practice trends, social determinants of health and the impact of health care reform on physicians and patients.

The Physicians Foundation was founded in 2003 through the settlement of a class-action lawsuit brought by physicians and state medical associations against private third-party payers. Its Board of Directors is comprised of physician and medical society leaders from around the country. Additional information about The Physicians Foundation can be accessed at www.physiciansfoundation.org.

First launched in 2012, The Physicians Foundation's national *Patient Survey* was conducted in 2016 and 2017 and is now conducted on a biennial basis.

Signatory Medical Societies of The Physicians Foundation include:

- Alaska State Medical Association
- California Medical Association
- Connecticut State Medical Society
- Denton County Medical Society (Texas)
- El Paso County Medical Society (Colorado)
- Florida Medical Association
- Hawaii Medical Association
- Louisiana State Medical Society
- Medical Association of Georgia
- Medical Society of New Jersey
- Medical Society of Northern Virginia
- Medical Society of the State of New York
- Nebraska Medical Association
- New Hampshire Medical Society
- North Carolina Medical Society
- South Carolina Medical Association
- Tennessee Medical Association
- Texas Medical Association
- Vermont Medical Society
- Washington State Medical Association



About Regina Corso Consulting



Regina Corso Consulting is a communications-focused research and insights firm. Led by public release research expert, Regina Corso, the team is made up of seasoned research and communications professionals who deliver strategic and creative research to equip clients with actionable data for communications programs. The firm conducts research for media outreach efforts, local media tours, social and digital campaigns, and thought leadership efforts. For more information, visit www.ReginaCorsoConsulting.com.



Methodology



The Physicians Foundation's *2019 Survey of America's Patients* was disseminated online to adults between September 4 and 13, 2019. This sample reflects the population of Americans as a whole based on age, gender and region and is reflective of the population as based on U.S. Census data.

The survey included 32 separate questions and the survey took approximately 14 minutes to complete. Because the sample is based on those who have agreed to participate in surveys, no estimates of sampling error can be calculated.

Total number of Americans surveyed was 2,001. A total of 993 were between ages 27 and 75 and have seen the same doctor more than once in the past 12 months.

Note: Percentages may not add up to 100% due to rounding or because multiple responses were allowed.

Key Findings

The *2019 Survey of America's Patients* reveals an expensive and hard to navigate system that the average Americans are forced to face daily. Key findings include:

Rising Health Care Costs



- **73%** of Americans are concerned about their ability to pay for medical treatment if they were to get sick or injured and **half of** Americans say they feel they are one sickness away from being in serious financial trouble.

42% of Americans could afford \$500 or less before they would have financial issues.

22% of Americans could afford between \$501 and \$2,500 before they would have financial issues.

37% of Americans could afford more than \$2,500.

Increased worry about health care costs, political divide across generations, concern for the impact of poverty on health outcomes, support for more physician leadership



- **84%** of Americans say they are concerned about how much health care costs will affect them in the future.



- **86%** of Americans say cost and **72%** say waiting for insurance pre-approvals negatively impact patient care.


The Politics of Health Care

22% "single payer health care"

- 22% of Americans don't know what **single payer health care** means at all.

77% 

- 77% cannot agree on one definition.

55% 

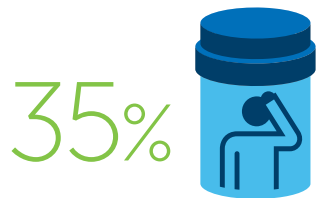
- 55% of Americans are more likely to vote for a presidential candidate who advocates for expanding private insurance reforms.

62% 49%



- 62% of Americans say rising health care costs are due to cost of prescription drugs, while 49% point to hospital costs.

The Opioid Epidemic Impacts Most Americans



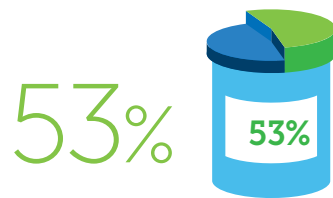
35% of Americans know someone who has abused or is addicted to opioids.



21% know someone who has died because of opioid use.



60% of Americans believe rehabilitation is an essential health care service, while **45%** believe care for substance abuse is essential.



53% of Americans say pharmaceutical companies are most responsible for the opioid epidemic...



while **two in five (39%)** say physicians are most to blame.

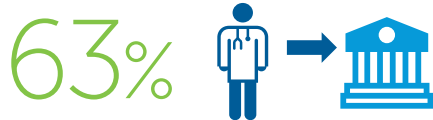
Additional Patient Priorities



- **92%** of patients are satisfied with the relationship they have with their primary care physician.



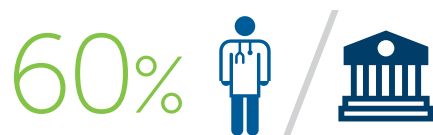
- **65%** of Americans say the time physicians spend with their patients is limited with **22%** saying it's always limited.



- **63%** of Americans believe physicians have the ability to significantly influence the health care system.



- **91%**, however, believe they **should** have the ability to significantly influence the health care system.



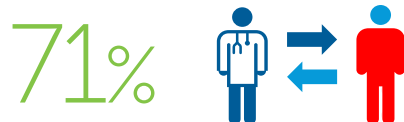
- **60%** of Americans strongly agree that the physician's opinion should outweigh the insurance company's opinion when it comes to health care.



- **73%** of Americans say poverty, income inequality and inadequate social services are a significant reason for America's high health care spending.



- **77%** of Americans believe hospitals, clinics and doctors should look beyond their patients' medical needs to see if causes such as food issues, transportation issues and housing concerns are interfering with health issues.

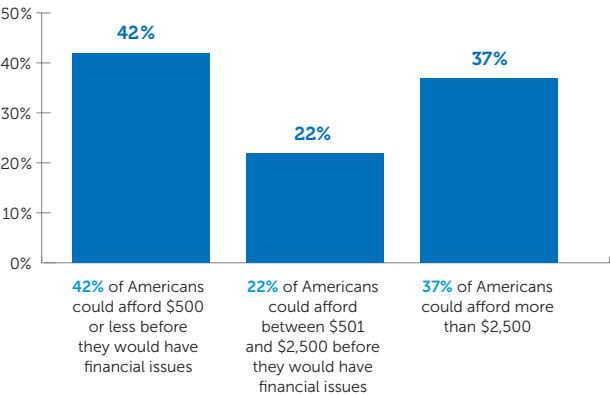
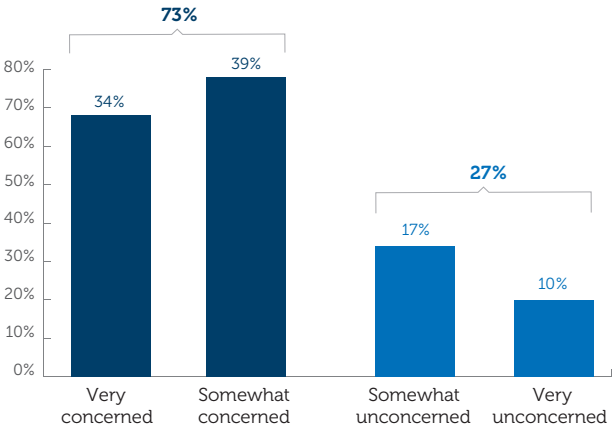


- **71%** feel that the ultimate decisions about their health care should be a collaboration with their physician.
 - **39%** feel that insurance companies make the ultimate decisions about their treatment and only **38%** feel that the ultimate decision rests in a collaboration with their physician.

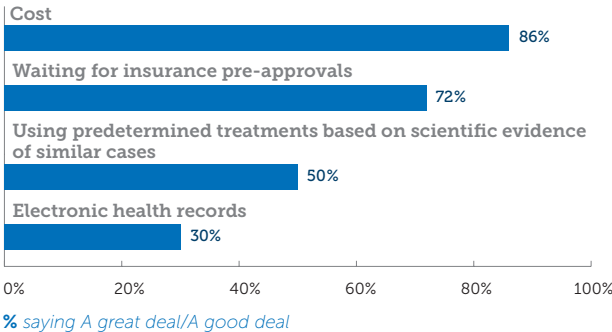
2019 Survey of America's Patients: Trends and Analysis

Rising Health Care Costs

The high cost of health care looms over patients. The rise of what they must pay for medical care is causing significant financial concern. Overall health care costs — including all private and public spending — are *anticipated* to rise by an average of 5.5% per year over the next decade¹. With health care spending projected to grow faster than the economy and 55% of American patients themselves saying they could afford \$1,000 or less before they would have financial issues, something must be done to ensure patients continue to receive cost-efficient, quality care.



Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
84%	45%	39%	16%	12%	4%

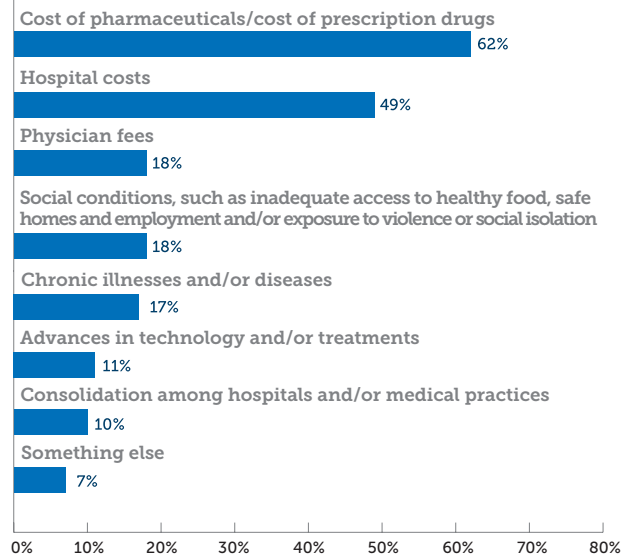
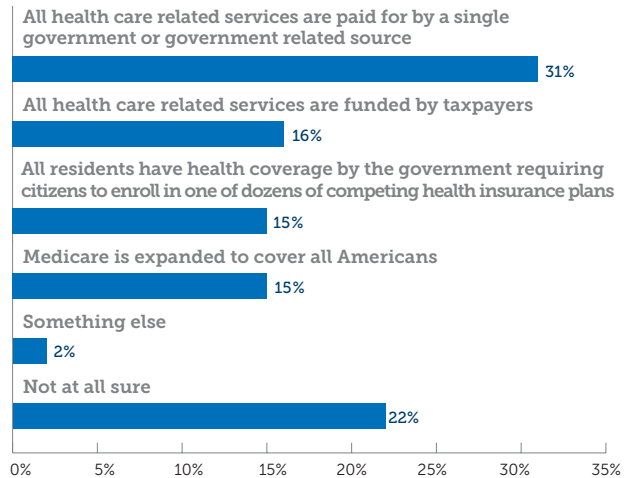
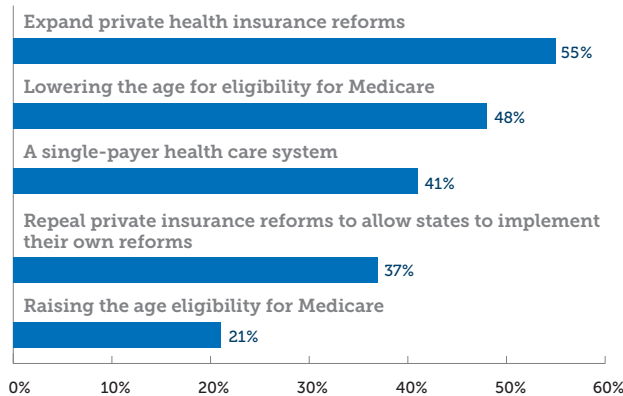


¹<https://www.pgpf.org/blog/2019/05/healthcare-costs-for-americans-projected-to-grow-at-an-alarmingly-high-rate>

The Politics of Health Care

In addition to rising costs, the current political discussion about health care is confusing to patients. This complex system makes it harder for patients to navigate insurance and reimbursement hurdles. In fact, Americans are not sure exactly what “single payer health care” means. The politicians leading conversations on health reform need to do a better job explaining such policies and interacting with patients directly to gain their perspective.

Moreover, patients are looking for presidential candidates to include the physician perspective. Most Americans want both physicians and politicians as their allies, with the majority more likely to vote for a candidate who advocates for expanding private insurance reforms.

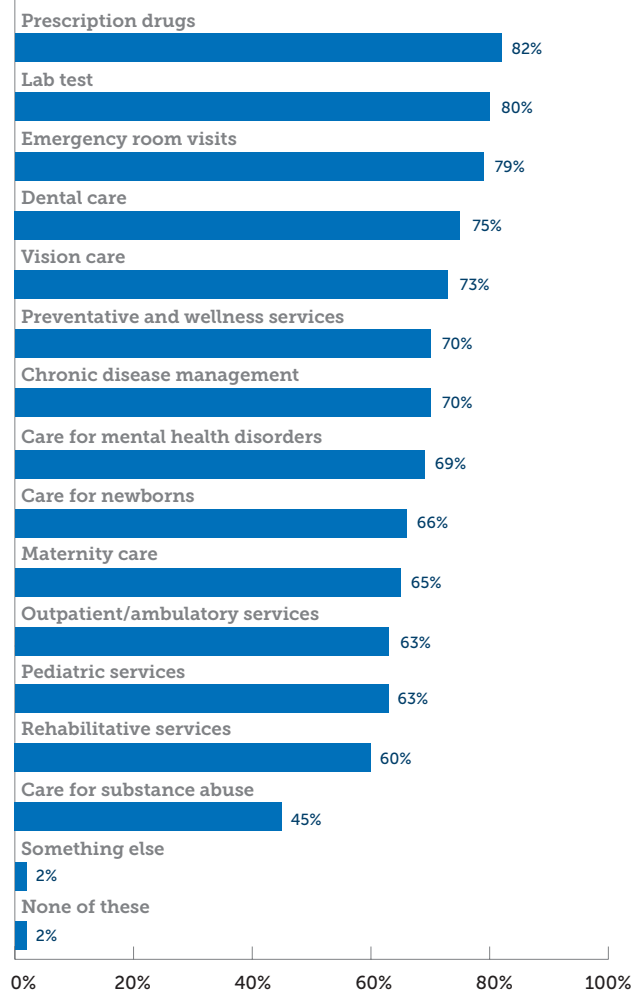
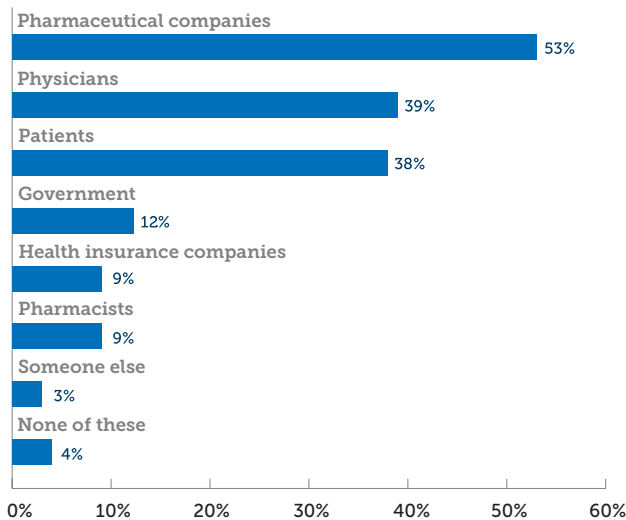


% saying Much more/Somewhat more likely

The Opioid Epidemic Impacts Most Americans

When it comes to the opioid epidemic, the survey shows this is a serious public health emergency impacting a majority of Americans.

Patients blame pharmaceutical companies and physicians for their role in causing the opioid epidemic. However, data from the *2018 Survey of America's Physicians* found that 69% of physicians are prescribing fewer pain medications².

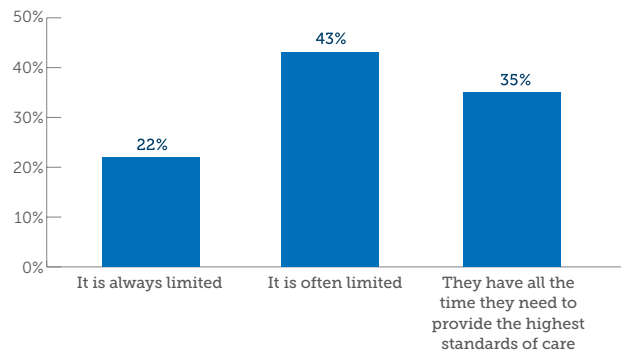
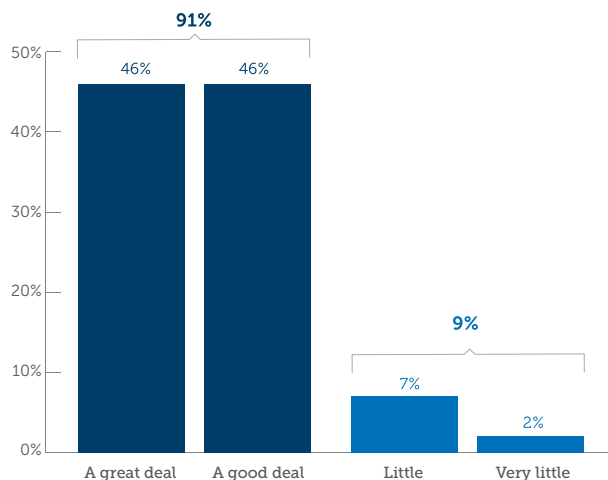


²<https://physiciansfoundation.org/research-insights/the-physicians-foundation-2018-physician-survey/>

Additional Patient Priorities

Patients recognize that physicians are their advocates and should have a great deal of influence on the direction of our health care system. However, patients underestimate how little influence physicians actually have due to the current environment, which is dominated by insurance companies and executives with no real insight into patient needs.

Given the current state of the patient experience, physicians should be leading our health care system, not insurers or pharmaceutical company executives. There is a clear consensus among America's patients that physicians are guardians of quality and must be recognized as the key decisionmakers for patient care.



The physician should be allowed to overrule the health insurance company when it comes to determining the right treatment plan.

Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
94%	59%	35%	6%	5%	1%

My physician's opinion needs to outweigh my insurer's opinion when it comes to my health care.

Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
93%	60%	33%	7%	6%	2%

As leaders of patient care, the physician's voice must be from and center around health care access, cost and quality.

Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
93%	51%	42%	7%	6%	1%

Physicians and patients create a true partnership, representing the most essential elements of a quality health care system.

Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
92%	51%	41%	8%	7%	1%

Physicians are guardians of quality and must be recognized as the key decisionmaker for patient care.

Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
90%	48%	42%	10%	8%	2%

When I think about my health care, I receive exactly what I want and need exactly when and how I want and need it.

Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
70%	25%	46%	30%	22%	8%

In addition to access to cost-efficient, quality care, it's critical that all stakeholders involved in the delivery of care focus on addressing social determinants of health. The majority of Americans feel poverty, income inequality and inadequate social services are a significant reason for America's high health care spending. Even more Americans feel hospitals, clinics and doctors should look beyond their patients' medical needs to see if causes such as food issues, transportation issues and housing issues are interfering with health issues.

I am concerned about how much health care costs will affect me in the future



Poverty, income inequality and in-adequate social services are a significant reason or America's high health care spending



Instead of repealing the current health care system, politicians in Washington should just try and make it better



Sometimes I feel like I'm one sickness away from being in serious financial trouble



0% 20% 40% 60% 80% 100%

Hospitals, clinics and doctors should look beyond their patients' medical needs to see if causes such as food issues, transportation issues and housing concerns are interfering with health issues.

Agree (NET)	Strongly agree	Somewhat agree	Disagree (NET)	Somewhat disagree	Strongly disagree
77%	27%	50%	24%	19%	5%

Conclusion

At a time when the future of our health care system is being publicly debated, these data reveal a number of critical insights from our patients. From the root causes of escalating costs to the importance of physician input into policy matters, patients are also concerned that medical decisions are being taken out of the hands of their doctors. The impact of the opioid epidemic is widely felt, and patients recognize the impact that social factors play in the success of medical care. Patients widely perceive the financial consequences of illness as very serious and real, and feel that their time spent directly interacting with their physicians is under significant pressure.

Our health care system, which has the potential to be the best in the world, is faltering, and these data showcase how patients are negatively impacted. We cannot continue having siloed conversations among policymakers with little-to-no input from physicians or their patients.

While costs continue to be a very real concern, patients have important insights regarding who should be dictating care. The physician-patient relationship should be at the forefront of our health care system with the goal of driving down costs while improving the delivery of high-quality care for all people.



Appendix

Questions Asked and Responses Received/All Respondents

Following are questions asked by in the *2019 Survey of America's Patients* with responses received.

Note: Percentages may not add up to 100% due to rounding or because multiple responses were allowed.

1. Please think of the doctor who you consider to be your primary doctor, even if he or she is not your Primary Care Physician. Thinking of your primary doctor, do you believe you have a doctor-patient relationship with that doctor?

YES (NET) 76%

Yes, I have a strong relationship with my primary doctor..... 45%

Yes, I have a relationship, but it's not a strong one 32%

NO (NET) 15%

No, I don't believe I have a relationship with my doctor 10%

No, I definitely don't have a relationship with my primary doctor 5%

I don't have a primary doctor..... 9%

2. Still thinking of that primary doctor, how satisfied are you with your overall relationship with that doctor?

SATISFIED (NET) 92%

Very satisfied..... 60%

Somewhat satisfied 32%

NOT SATISFIED (NET) 8%

Not that satisfied 6%

Not at all satisfied..... 1%

3. Have you changed your primary doctor in the past 2 years?

Yes, I have changed doctors..... 21%

No, I haven't changed doctors, but I've thought about doing so..... 18%

No, I haven't changed doctors and I have not thought about doing so ... 61%

4. Why did you change your primary doctor? Please be as specific as possible.

Doctor left/Retired 22%

I moved 21%

Insurance changed..... 10%

Patients no longer given best care..... 7%

Doctor transferred/moved..... 7%

Trying to find best fit 7%

Prefer one closer to home 5%

5. Why have you thought about changing your primary doctor? Please be as specific as possible.

Prefer one closer to home	21%
Current doctor isn't always available.....	10%
Not happy with current doctor	7%
Current doctor not knowledgeable.....	7%
Prefer more personal care	7%
Quality of care isn't good.....	7%
Current doctor about to retire.....	4%
Doctor doesn't listen to me	4%
Wait times too long.....	4%

6. How has your relationship with your primary physician changed, if at all, due to a merger with another practice or the practice becoming part of a larger health system?

Our relationship became better.....	10%
Our relationship stayed the same.....	39%
Our relationship became worse	3%
My physician's office hasn't merged or become part of a larger health system.....	48%

7. What best describes the time that physicians are able to spend with patients?

It is always limited.....	22%
It is often limited.....	43%
They have all the time they need to provide the highest standards of care.....	35%

8. How much ability do you believe physicians have to significantly influence the health care system?

HAVE ABILITY (NET)	63%
A great deal.....	23%
A good deal	40%
DO NOT HAVE ABILITY (NET).....	37%
A little.....	27%
Very little	10%

9. And, how much ability do you believe physicians should have to significantly influence the health care system?

SHOULD HAVE ABILITY (NET)	91%
A great deal.....	46%
A good deal	46%
SHOULD NOT HAVE ABILITY (NET).....	9%
A little.....	7%
Very little	2%

10. Who do you believe makes the ultimate decision when it comes to the treatment options that are available to patients?

Health insurance companies	39%
My physician and me.....	38%
Me and/or my family	13%
The government	7%
Pharmaceutical companies.....	4%

11. And, who do you believe should make the ultimate decision when it comes to the treatment options that are available to patients?

My physician and me.....	71%
Me and/or my family	23%
Health insurance companies	3%
The government	2%
Pharmaceutical companies.....	1%

12. How much do you believe patient care is negatively impacted by each of the following factors?

Using predetermined treatments based on scientific evidence of similar cases

NEGATIVELY IMPACTED (NET)	50%
A great deal.....	20%
A good deal	29%
NOT NEGATIVELY IMPACTED (NET) ...	50%
A little.....	35%
Not at all	16%

Cost

NEGATIVELY IMPACTED (NET)	86%
A great deal.....	60%
A good deal	26%
NOT NEGATIVELY IMPACTED (NET) ...	15%
A little.....	11%
Not at all	4%

Electronic health records

NEGATIVELY IMPACTED (NET)	30%
A great deal.....	12%
A good deal	19%
NOT NEGATIVELY IMPACTED (NET) ...	70%
A little.....	30%
Not at all	40%

Waiting for insurance pre-approvals

NEGATIVELY IMPACTED (NET)	72%
A great deal.....	40%
A good deal.....	32%
NOT NEGATIVELY IMPACTED (NET) ...	28%
A little	23%
Not at all.....	5%

13. How strongly do you believe doctors should advocate for their patients?

SHOULD ADVOCATE.....	97%
Should be a strong advocate	78%
Should advocate somewhat	19%
SHOULD NOT ADVOCATE	3%
Should not advocate that much.....	2%
Should not advocate at all.....	1%

14. How often, if at all, do you access your electronic medical records?

ACCESS (NET)	45%
All the time	11%
On occasion	34%
DO NOT ACCESS (NET)	44%
Rarely	27%
Never	17%
I don't have access to my electronic medical records	11%

15. How strongly do you agree or disagree with the following statements?

Technological advances in health care will greatly improve the quality of care patients receive.

AGREE (NET)	85%
Strongly agree	27%
Somewhat agree	58%
DISAGREE (NET)	15%
Somewhat disagree	13%
Strongly disagree	3%

The reliance on technology can interfere with high quality care.

AGREE (NET)	60%
Strongly agree	17%
Somewhat agree	43%
DISAGREE (NET)	41%
Somewhat disagree	33%
Strongly disagree	7%

My doctor spends more time looking at his/her computer/tablet and less time looking at me now.

AGREE (NET)	42%
Strongly agree	13%
Somewhat agree	29%
DISAGREE (NET)	58%
Somewhat disagree	34%
Strongly disagree	23%

Physicians rely more on what the computer screen tells them and less on what the patient tells them during exams.

AGREE (NET)	54%
Strongly agree	15%
Somewhat agree	39%
DISAGREE (NET)	46%
Somewhat disagree	36%
Strongly disagree	10%

There needs to be a better balance between technology and administering care to patients.

AGREE (NET)	83%
Strongly agree	29%
Somewhat agree	54%
DISAGREE (NET)	17%
Somewhat disagree	14%
Strongly disagree	3%

16. Now, please think about the cost of health care. To what extent are you concerned or not concerned with your ability to pay for any medical treatment if you were to get sick or injured?

CONCERNED (NET).....	73%
Very concerned.....	34%
Somewhat concerned.....	39%
UNCONCERNED (NET).....	27%
Somewhat unconcerned.....	17%
Very unconcerned.....	10%

17. When it comes to health care costs, if you had an unexpected illness or injury, how much could you afford to spend before you would have financial issues? If you are not sure, please provide your best estimate.

\$0.....	0%
\$1-\$50.....	12%
\$51-\$100.....	11%
\$101-\$250.....	7%
\$251-\$500.....	12%
\$501-\$1000.....	13%
\$1001-\$2500.....	9%
Over \$2500.....	37%
Average.....	\$ 2,630

18. Which of the following, if any, do you consider to be essential health care services? Please select all that apply.

Prescription drugs.....	82%
Lab tests.....	80%
Emergency room visits.....	79%
Dental care.....	75%
Vision care.....	73%

Preventative and wellness services.....	70%
Chronic disease management.....	70%
Care for mental health disorders.....	69%
Care for newborns.....	66%
Maternity care.....	65%
Outpatient/ambulatory services.....	63%
Pediatric services.....	63%
Rehabilitative services.....	60%
Care for substance abuse.....	45%
Something else.....	2%
None of these.....	2%

19. If the government financed essential health care costs for everyone, how do you believe that would change, if at all, the health care most Americans currently receive?

BETTER (NET).....	56%
It would be much better.....	27%
It would be somewhat better.....	29%
WORSE (NET).....	40%
It would be somewhat worse.....	16%
It would be much worse.....	23%
It would not be any different.....	5%

20. How strongly do you agree or disagree with the following statements?

I am concerned about how much health care costs will affect me in the future.

AGREE (NET).....	84%
Strongly agree.....	45%
Somewhat agree.....	39%
DISAGREE (NET).....	16%
Somewhat disagree	12%
Strongly disagree	4%

Instead of repealing the current health care system, politicians in Washington should just try and make it better.

AGREE (NET).....	75%
Strongly agree.....	39%
Somewhat agree.....	36%
DISAGREE (NET).....	25%
Somewhat disagree	14%
Strongly disagree	11%

Sometimes I feel like I'm one sickness away from being in serious financial trouble.

AGREE (NET).....	49%
Strongly agree.....	20%
Somewhat agree.....	30%
DISAGREE (NET).....	51%
Somewhat disagree	29%
Strongly disagree	22%

Poverty, income inequality and inadequate social services are a significant reason for America's high health care spending.

AGREE (NET).....	73%
Strongly agree.....	32%
Somewhat agree.....	42%
DISAGREE (NET).....	27%
Somewhat disagree	19%
Strongly disagree	8%

The Affordable Care Act was a good start, but it needs to have some of the pieces changed.

AGREE (NET).....	75%
Strongly agree.....	35%
Somewhat agree.....	40%
DISAGREE (NET).....	25%
Somewhat disagree	12%
Strongly disagree	13%

Hospitals, clinics and doctors should look beyond their patients' medical needs to see if causes such as food issues, transportation issues and housing concerns are interfering with health issues.

AGREE (NET).....	77%
Strongly agree.....	27%
Somewhat agree.....	50%
DISAGREE (NET).....	24%
Somewhat disagree	19%
Strongly disagree	5%

If there were fewer ads by pharmaceutical companies on television, these companies could charge less for the actual drugs.

AGREE (NET).....	76%
Strongly agree.....	34%
Somewhat agree.....	42%
DISAGREE (NET).....	24%
Somewhat disagree.....	18%
Strongly disagree.....	6%

Under a single payer system, my freedom in choosing my health insurance will have greater limitations.

AGREE (NET).....	72%
Strongly agree.....	31%
Somewhat agree.....	41%
DISAGREE (NET).....	28%
Somewhat disagree.....	21%
Strongly disagree.....	7%

21. Which two of the following are the main factors that contribute to rising health costs? While you may believe all of them contribute, please select only the two you believe are the top reasons.

Cost of pharmaceuticals/cost of prescription drugs.....	62%
Hospital costs.....	49%
Physician fees.....	18%
Social conditions, such as inadequate access to healthy food, safe homes, and employment and/or exposure to violence or social isolation.....	18%
Chronic illnesses and/or diseases.....	17%

Advances in technology and/or treatments.....	11%
Consolidation among hospitals and/or medical practices.....	10%
Something else.....	7%

22. How important is it for a physician to know the following things about their patients?

Food issues, such as having limited or uncertain access to adequate and nutritious food.

IMPORTANT (NET).....	89%
Very important.....	49%
Somewhat important.....	40%
NOT IMPORTANT (NET).....	11%
Not that important.....	9%
Not at all important.....	2%

Housing issues, such as struggling to pay rent/mortgage, being homeless or having frequent housing disruptions.

IMPORTANT (NET).....	73%
Very important.....	29%
Somewhat important.....	44%
NOT IMPORTANT (NET).....	27%
Not that important.....	20%
Not at all important.....	8%

Utility issues, such as difficulty paying their electric or phone bills.

IMPORTANT (NET).....	59%
Very important.....	20%
Somewhat important.....	39%
NOT IMPORTANT (NET).....	41%
Not that important.....	29%
Not at all important.....	12%

Transportation issues, such as difficulty getting to work, school or doctor's offices.

IMPORTANT (NET).....	70%
Very important.....	26%
Somewhat important.....	44%
NOT IMPORTANT (NET).....	30%
Not that important.....	24%
Not at all important.....	7%

Violence issues, such as exposure to domestic violence, elder abuse or community violence.

IMPORTANT (NET).....	90%
Very important.....	57%
Somewhat important.....	33%
NOT IMPORTANT (NET).....	10%
Not that important.....	8%
Not at all important.....	2%

Social isolation issues, such as lack of family and/or friends and absence of social engagements.

IMPORTANT (NET).....	80%
Very important.....	35%
Somewhat important.....	45%

NOT IMPORTANT (NET).....	20%
Not that important.....	15%
Not at all important.....	5%

Behavioral and/or mental health issues, such as stress, anxiety, depression or trauma.

IMPORTANT (NET).....	95%
Very important.....	66%
Somewhat important.....	29%
NOT IMPORTANT (NET).....	5%
Not that important.....	4%
Not at all important.....	1%

Employment issues, such as under-employment and/or unemployment.

IMPORTANT (NET).....	69%
Very important.....	26%
Somewhat important.....	43%
NOT IMPORTANT (NET).....	31%
Not that important.....	24%
Not at all important.....	8%

23. The next few questions are about opioids. Please note your answers are completely confidential and your responses are only looked with all others who have taken this survey. Do you know anyone personally who has done any of the following?

Has abused or become addicted to opioids	
YES (NET).....	35%
Yes, a family member.....	14%
Yes, a close friend.....	8%
Yes, an acquaintance or colleague.....	13%

No, I don't know anyone.....64%

Prefer not to answer1%

Has become addicted to heroin or other illegal substances because of a previous opioid addiction

YES (NET).....26%

Yes, a family member 9%

Yes, a close friend..... 8%

Yes, an acquaintance or colleague... 9%

No, I don't know anyone..... 73%

Prefer not to answer1%

Has died because of opioid use

YES (NET)..... 21%

Yes, a family member..... 5%

Yes, a close friend..... 6%

Yes, an acquaintance or colleague... 9%

No, I don't know anyone.....78%

Prefer not to answer1%

24. Which is closest to how you think about taking pain medication?

Will take over-the-counter pain medication for pain, not opioids.....31%

Will ask for a different prescription pain medication.....20%

Will take opioids if needed for pain..... 18%

Will take opioids for pain, but for a shorter time period..... 18%

Not at all sure 11%

Prefer not to answer1%

25. Who do you believe is most responsible for the current opioid crisis? While you may think all are responsible, please select the two you believe are most responsible.

Pharmaceutical companies..... 53%

Physicians..... 39%

Patients.....38%

Government12%

Health insurance companies 9%

Pharmacists..... 9%

Someone else 3%

None of these 4%

26. How strongly do you agree or disagree with the following statements?

Physicians and patients create a true partnership, representing the most essential element of a quality health care system.

AGREE (NET).....92%

Strongly agree..... 51%

Somewhat agree..... 41%

DISAGREE (NET)..... 8%

Somewhat disagree 7%

Strongly disagree1%

Physicians are guardians of quality and must be recognized as the key decisionmaker for patient care.

AGREE (NET)..... 90%

Strongly agree.....48%

Somewhat agree.....42%

DISAGREE (NET).....10%

Somewhat disagree 8%

Strongly disagree 2%

As leaders of patient care, the physician's voice must be front and center around health care access, cost and quality.

AGREE (NET).....	93%
Strongly agree	51%
Somewhat agree	42%
DISAGREE (NET).....	7%
Somewhat disagree	6%
Strongly disagree	1%

My physician's opinion needs to outweigh my insurer's opinion when it comes to my health care.

AGREE (NET).....	93%
Strongly agree.....	60%
Somewhat agree.....	33%
DISAGREE (NET).....	7%
Somewhat disagree	6%
Strongly disagree	2%

The physician should be allowed to overrule the health insurance company when it comes to determining the right treatment plan.

AGREE (NET).....	94%
Strongly agree.....	59%
Somewhat agree.....	35%
DISAGREE (NET).....	6%
Somewhat disagree	5%
Strongly disagree	1%

When I think about my health care, I receive exactly what I want and need exactly when and how I want and need it.

AGREE (NET).....	70%
Strongly agree.....	25%
Somewhat agree.....	46%
DISAGREE (NET).....	30%
Somewhat disagree	22%
Strongly disagree	8%

27. How confident are you that you can control and manage most of your health problems?

CONFIDENT (NET)	83%
Very confident.....	29%
Somewhat confident.....	54%
Not very confident.....	14%
I do not have any health problems	4%

28. Do you have enough money to buy the things that you need to live everyday such as food, clothing and/or housing?

Yes, always	87%
Sometimes.....	26%
No	7%

29. What does single payer health care mean to you?

All health care related services are paid for by a single government or government-related source	31%
All health care related services are funded by taxpayers.....	16%
All residents have health coverage by the government requiring citizens to enroll in one of dozens of competing health insurance plans.....	15%
Medicare is expanded to cover all Americans.....	15%
Something else.....	2%
Not at all sure	22%

30. Would you be more or less likely to vote for a presidential candidate who supported and/or advocated for the following items?

A single payer health care system

MORE LIKELY (NET).....	41%
Much more likely	18%
Somewhat more likely	23%
LESS LIKELY (NET).....	37%
Somewhat less likely.....	14%
Much less likely.....	23%
Not at all sure	22%

Raising the age for eligibility for Medicare

MORE LIKELY (NET).....	21%
Much more likely	7%
Somewhat more likely	14%

LESS LIKELY (NET).....	63%
Somewhat less likely.....	24%
Much less likely.....	39%
Not at all sure	17%

Lowering the age for eligibility for Medicare

MORE LIKELY (NET).....	48%
Much more likely	20%
Somewhat more likely	28%
LESS LIKELY (NET).....	35%
Somewhat less likely.....	17%
Much less likely.....	18%
Not at all sure	17%

Expand private insurance reforms

MORE LIKELY (NET).....	55%
Much more likely	18%
Somewhat more likely	37%
LESS LIKELY (NET).....	21%
Somewhat less likely.....	13%
Much less likely.....	8%
Not at all sure	24%

Repeal private insurance reforms to allow states to implement their own reforms

MORE LIKELY (NET).....	37%
Much more likely	11%
Somewhat more likely	26%
LESS LIKELY (NET).....	37%
Somewhat less likely.....	18%
Much less likely.....	20%
Not at all sure	25%

31. If you knew that your elected representative in Congress did not listen to physicians' input regarding health care matters, would that make you...?

MORE LIKELY TO VOTE FOR HIM/HER (NET) 12%

Much more likely to vote for him/her 5%

Somewhat more likely to vote for him/her 7%

LESS LIKELY TO VOTE FOR HIM/HER (NET)..... 80%

Somewhat less likely to vote for him/her..... 23%

Much less likely to vote for him/her... 57%

Would not change my vote..... 8%

32. When it comes to the presidential election in November, 2020 which party's candidate do you believe will best represent how you feel about health care?

Democratic candidate 41%

Republican candidate..... 34%

Other party's candidate 5%

None of the candidates..... 21%



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