

2017 PATIENT SURVEY REPORT FOR THE PHYSICIANS FOUNDATION

Conducted June 2017

By Regina Corso Consulting

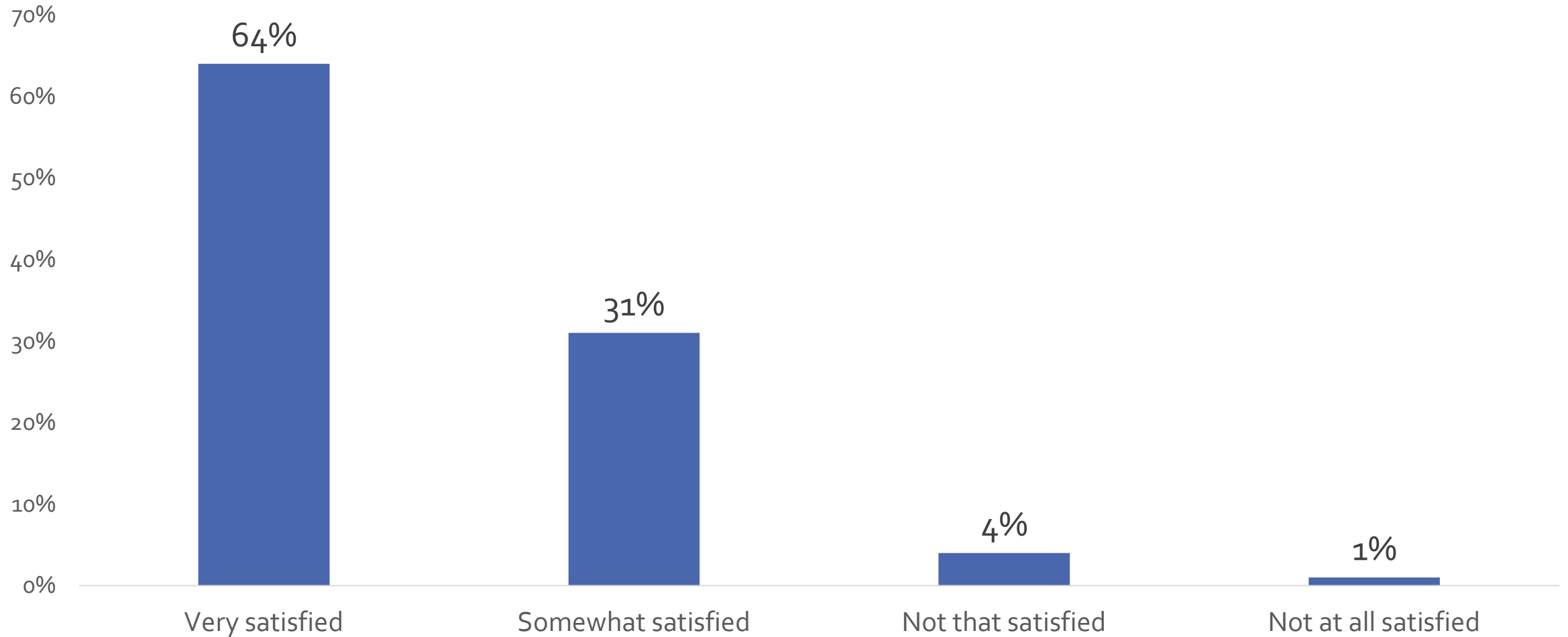


Introduction and Methodology

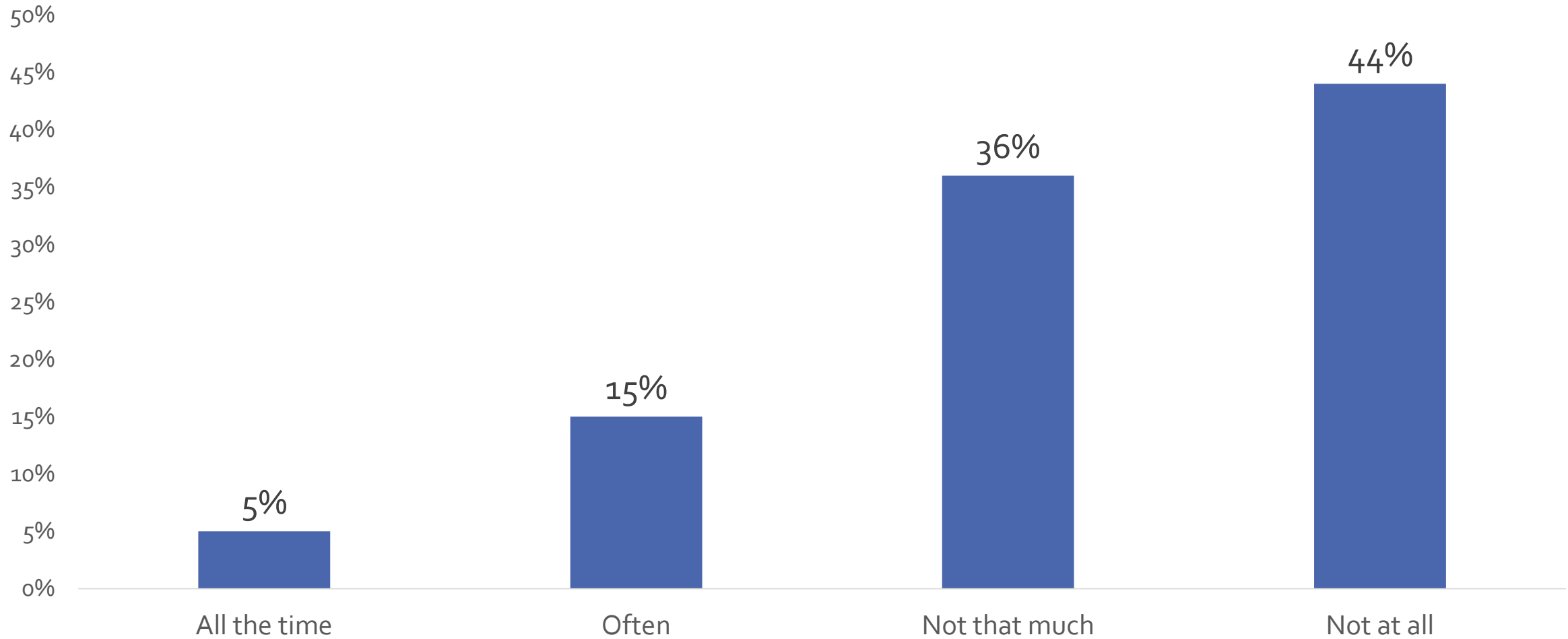
- The Physicians Foundation commissioned Regina Corso Consulting to conduct a survey of healthcare consumers to evaluate their attitudes on four major areas – the physician-patient relationship, the cost of healthcare, social determinants and lifestyle issues.
- This survey was conducted among 1,747 U.S. respondents who are between the ages of 27 and 75 and have seen the same doctor at least twice in the past 12 months.
- This survey was conducted online between June 19 and 30, 2017.
- Notes for reading charts and tables: if a chart or table has an “*” – that indicates the response was less than 0.5%. If it has an “—” – that indicates there was no response. Percentages may not add up to 100% due to rounding. Unless otherwise indicated, bases for all slides are 1,747 healthcare consumers.
- Data are weighted by age, income, gender and region to reflect a nationally representative sample of U.S. residents between the ages of 27 and 75.
- Data from physicians are based on The Physicians Foundation 2016 Survey of America’s Physicians conducted by Merritt Hawkins in September 2016.
- Data reported from patients in 2016 are based on The Physicians Foundation 2016 Patient Survey conducted by Harris Poll, a Nielsen company, in February 2016.

DETAILED FINDINGS

Q1: Thinking of your primary doctor, how satisfied are you with your overall relationship with that doctor? Please think of the doctor who you consider your primary doctor, even if he or she is not your Primary Care Physician.



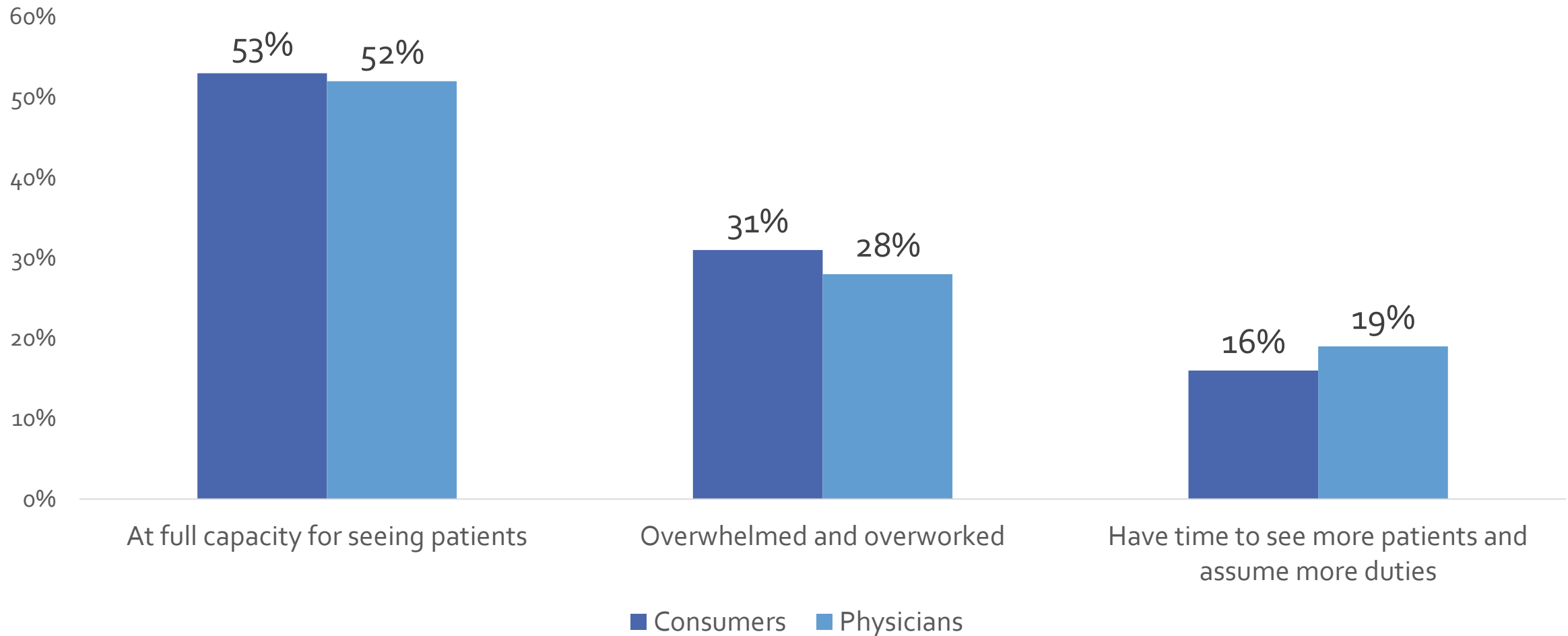
Q2: How often if at all, have you thought about changing your primary doctor?



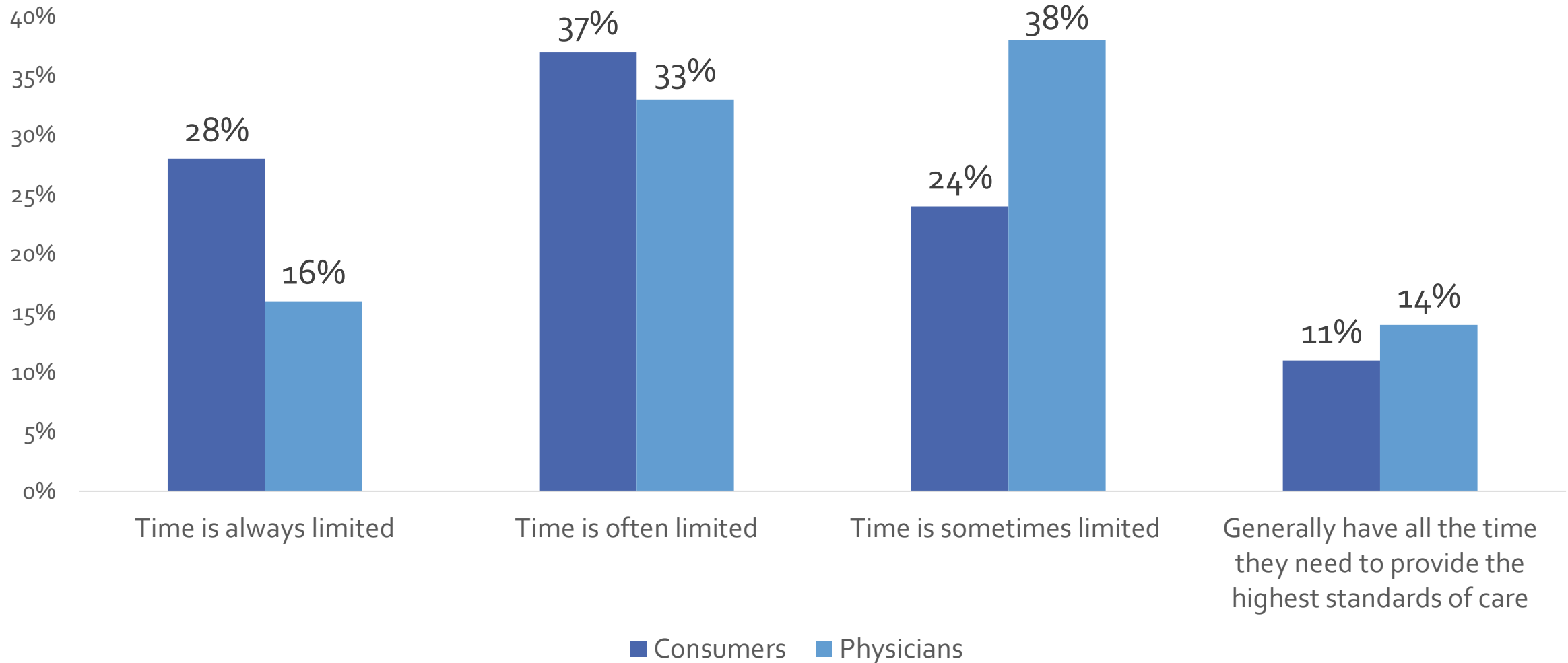
Q3: You mentioned you thought about changing your primary doctor. Why have you thought this?

- Three in ten of those who have thought of changing their primary physician (29%) say it is because of service issues.
 - 6% each say it is because the doctor does not do enough, because they do not listen to them, or does not provide enough personal service.
- One quarter of those who have thought of changing their primary physician (24%) say it is because of convenience.
 - 13% say it is because of location and/or distance
 - 4% say it is because of slow service or the wait time is too long
 - 3% say it is hard to get appointments
- 6% of those who thought of changing their primary physician say it is because they want a second option and because they found a better physician.

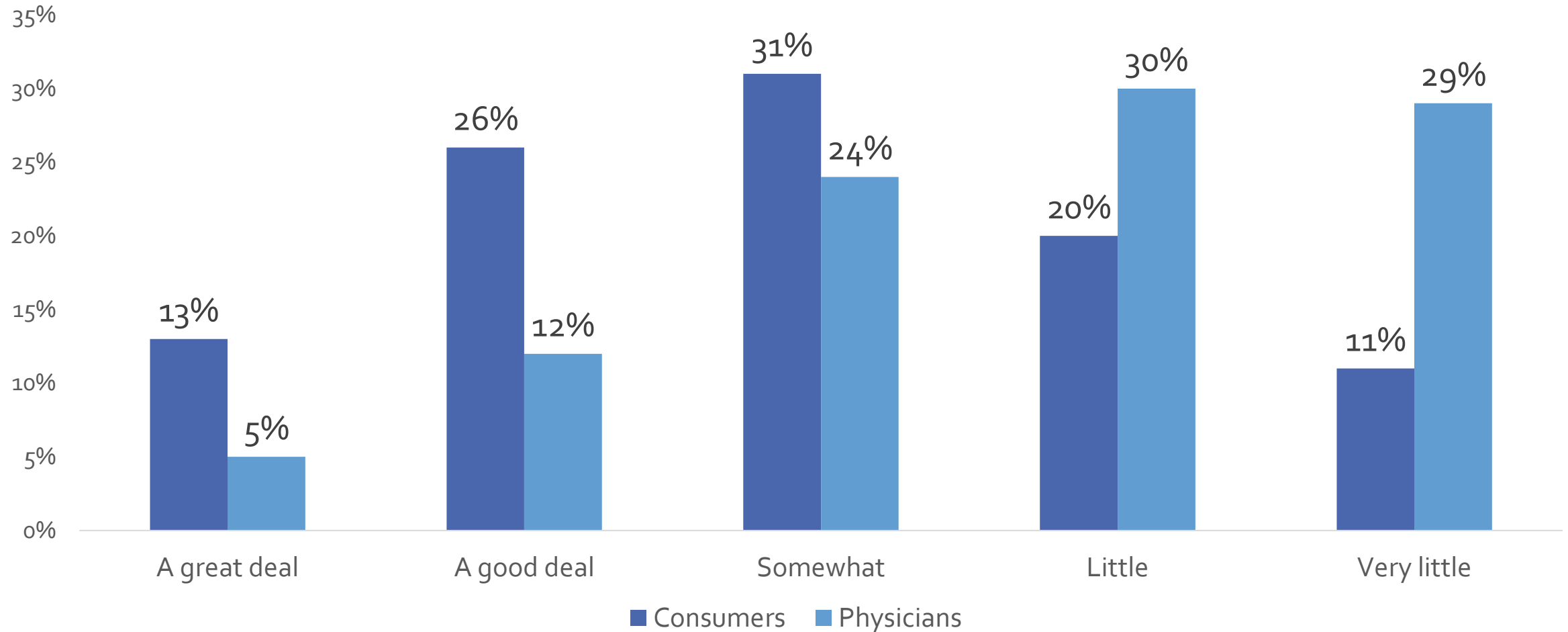
Q4: Overall, do you believe physicians are...? Among physicians – Which of the following best describes your current practice?



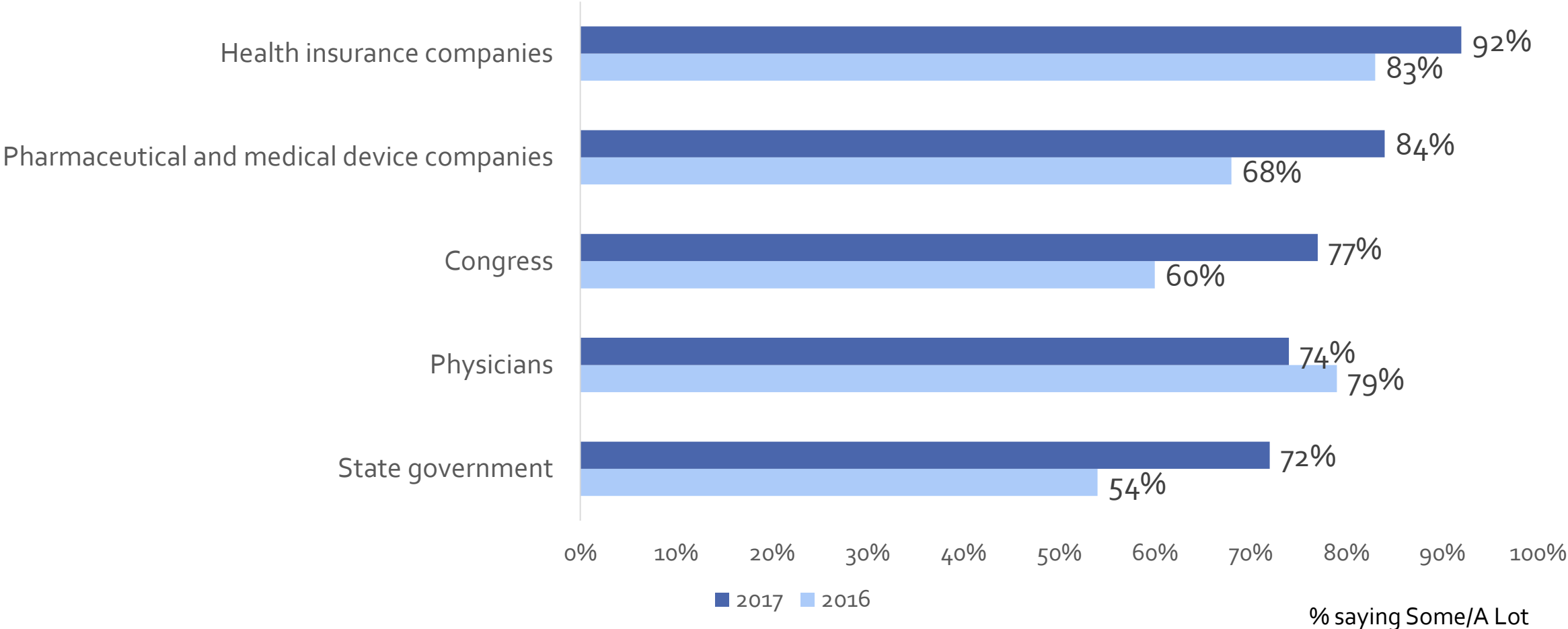
Q5: And, what best describes the time that physicians are able to spend with patients? Among physicians – Which best describes the time you are able to spend with patients?



Q6: How much ability do physicians have to significantly influence the healthcare system? Among physicians – How much ability to physicians have to significantly influence the healthcare system?



Q7: Overall, thinking about treatment options for medical conditions, please tell how much each group, as a whole, impacts treatment options available to patients?

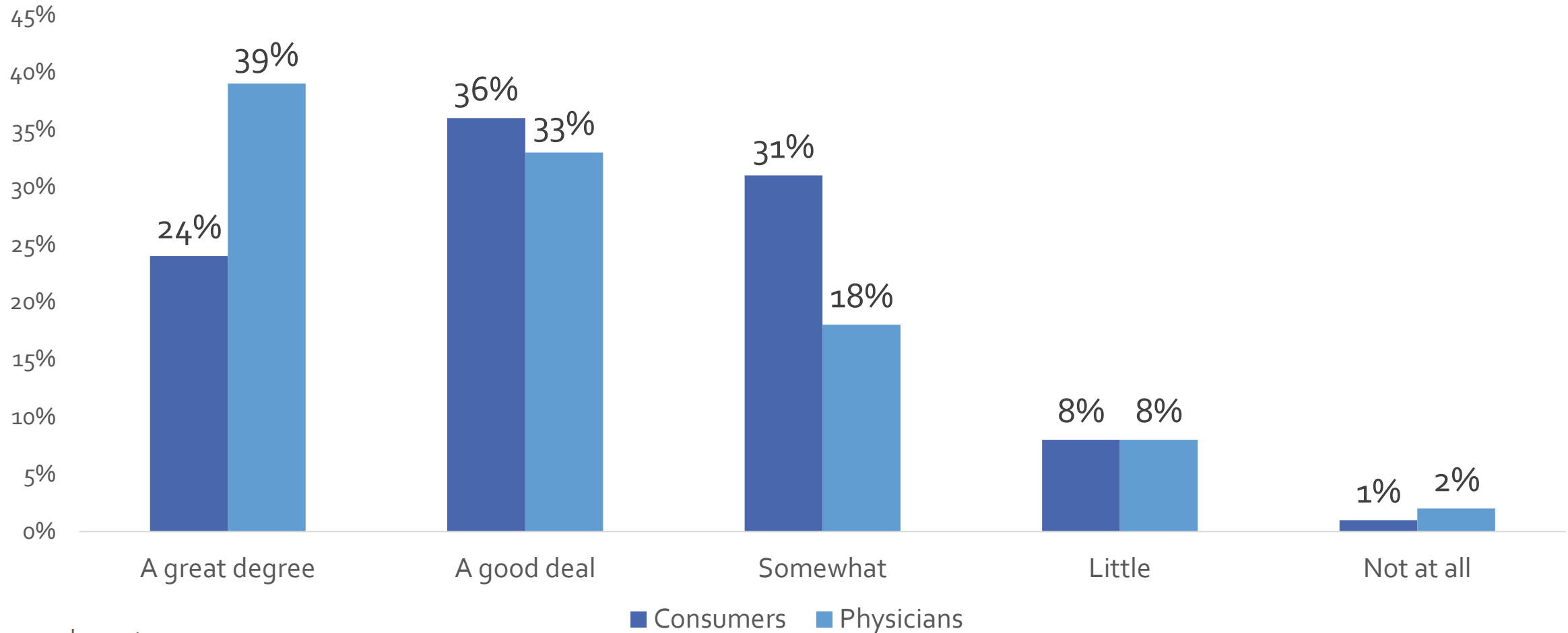


Please note in 2016, Congress was "the federal legislature and State Governments was State legislatures.

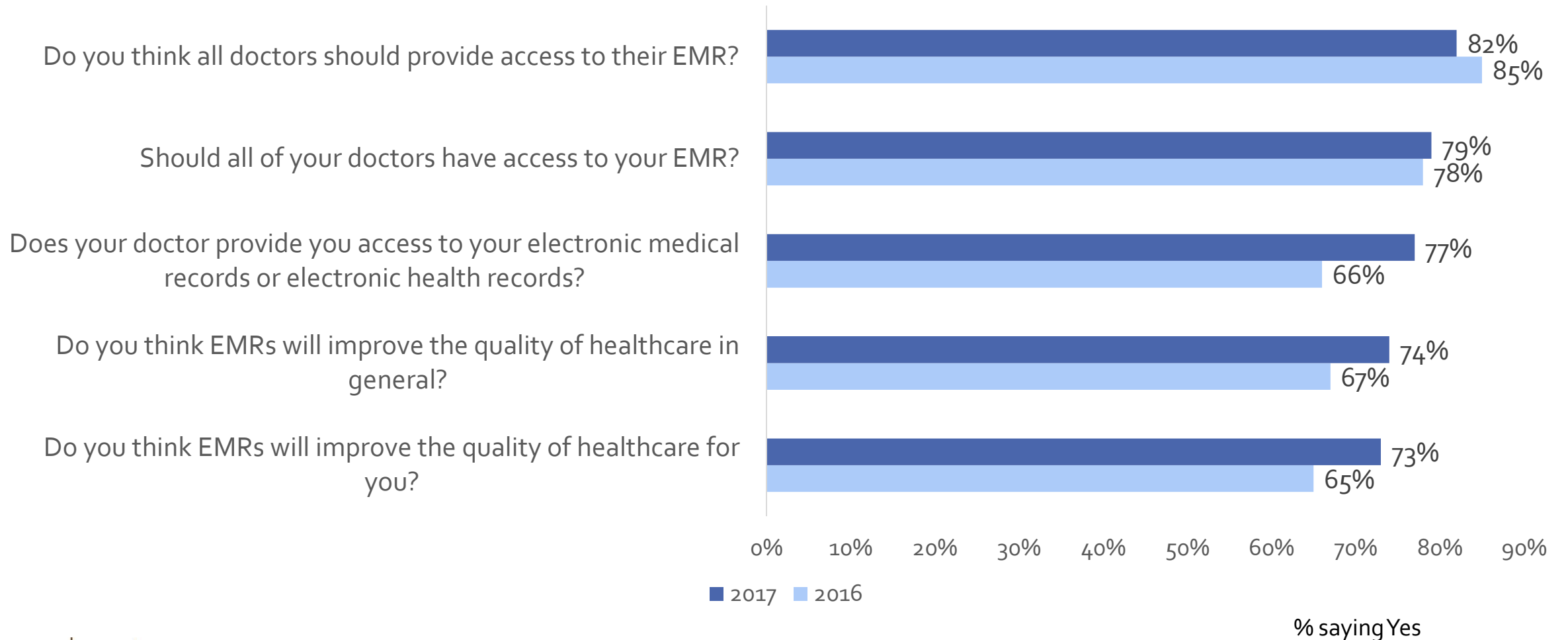
Q7: Overall, thinking about treatment options for medical conditions, please tell how much each group, as a whole, impacts treatment options available to patients?

	Some/ A Lot	A Lot	Some	Not at all/A little	A Little	Not at all
	%	%	%	%	%	%
Health insurance companies	92	69	23	8	7	2
Pharmaceutical and medical device companies	84	49	35	16	14	3
Congress	77	41	36	23	16	7
Physicians	74	31	42	26	23	3
State government	72	31	41	28	22	6

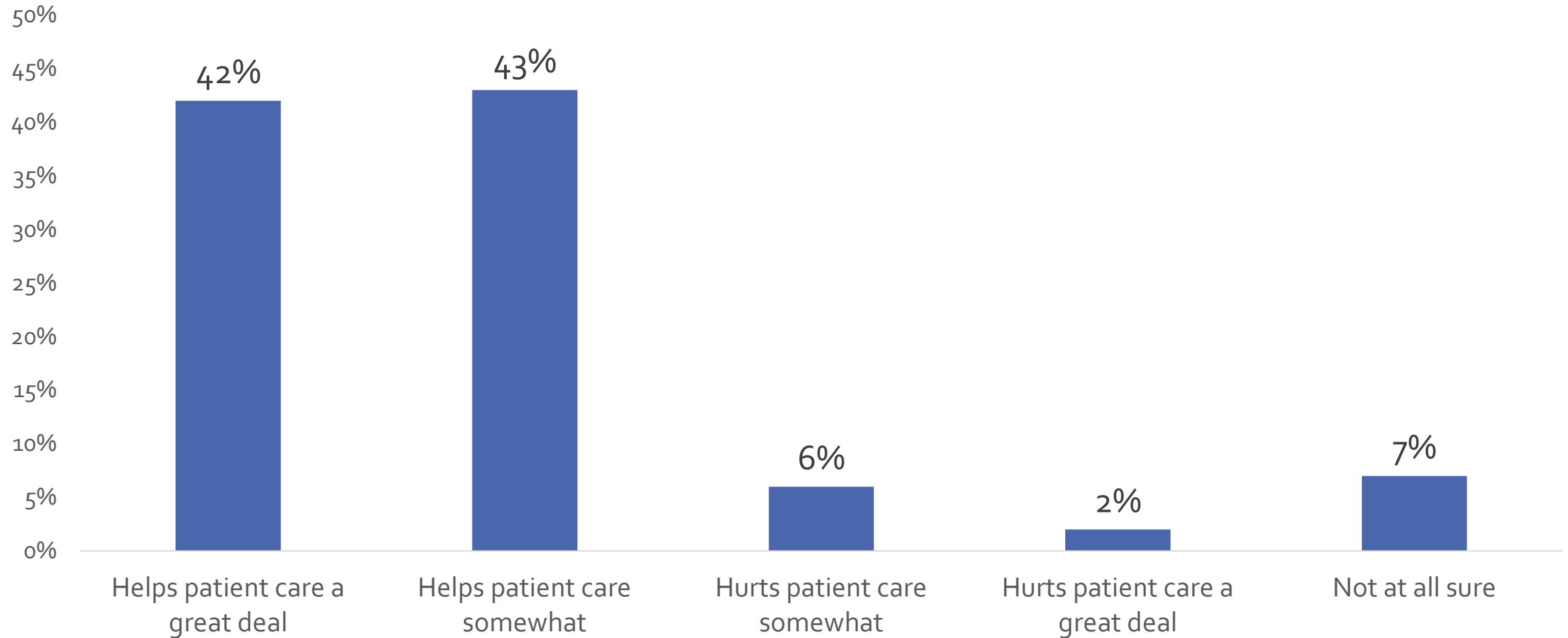
Q8: To what degree is patient care today adversely impacted by external factors such as third party authorization, treatment protocols, Electronic Health Record designs, etc.? Among Physicians – To what degree is patient care in your practice adversely impacted by external factors such as third party authorizations, treatment protocols, EHR design, etc.?



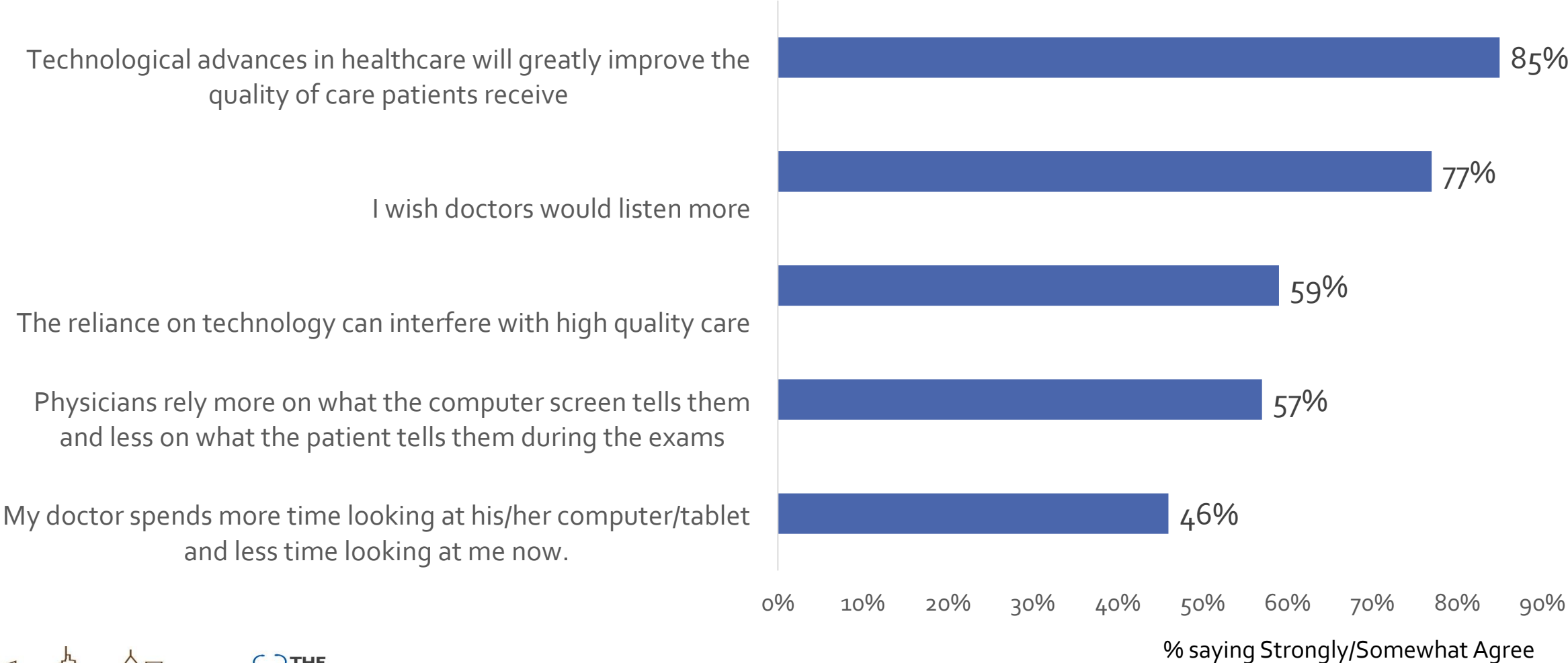
Q9: Patients can often access their electronic medical records, also known as EMRs, through a portal over the internet.



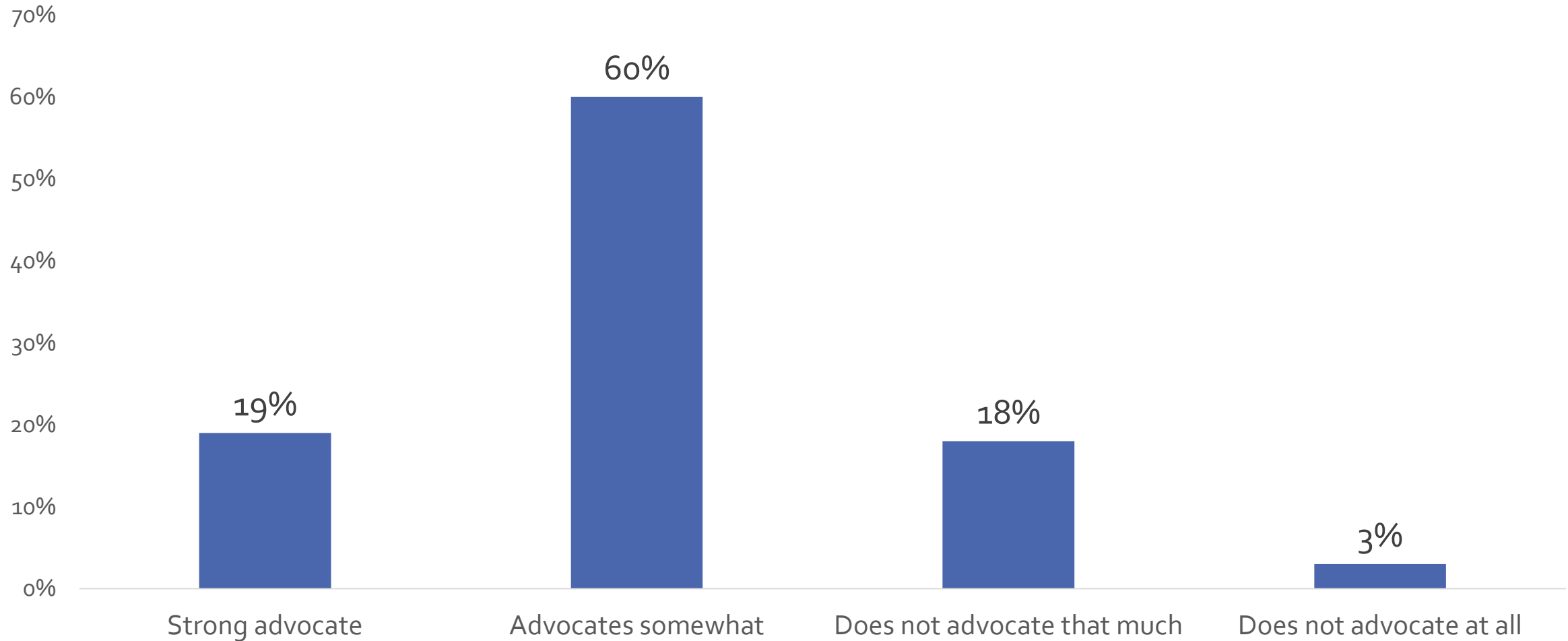
Q10: Do you believe Electronic Medical Records...?



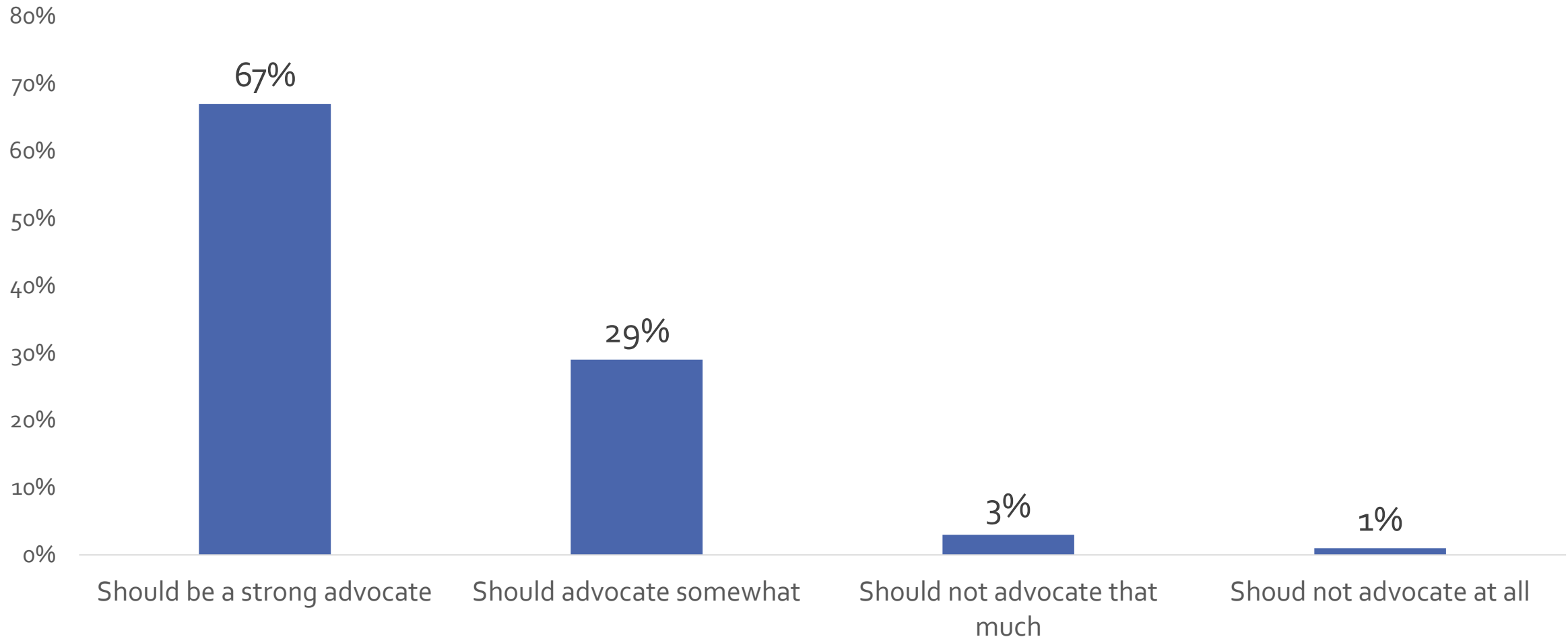
Q11: How strongly do you agree or disagree with the following statements?



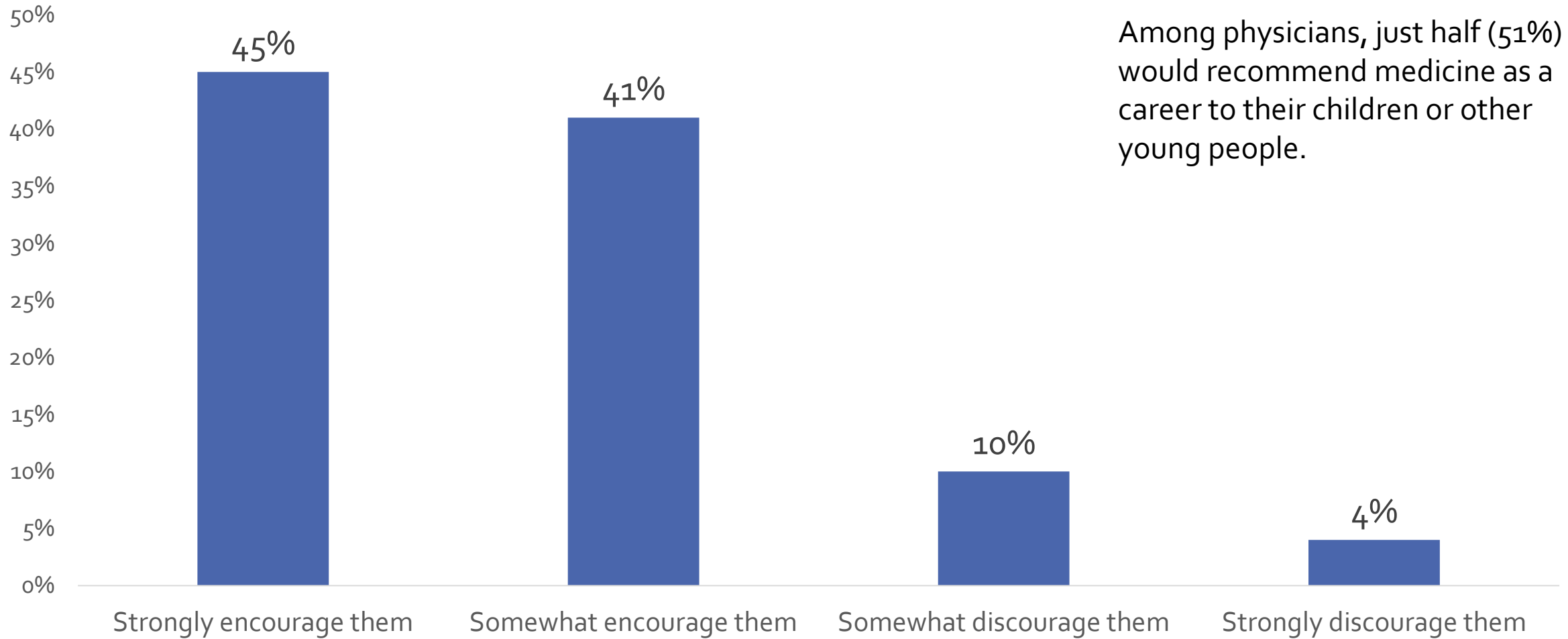
Q12: How strongly do you believe doctors advocate for their patients?



Q13: How strongly do you believe doctors should advocate for their patients?

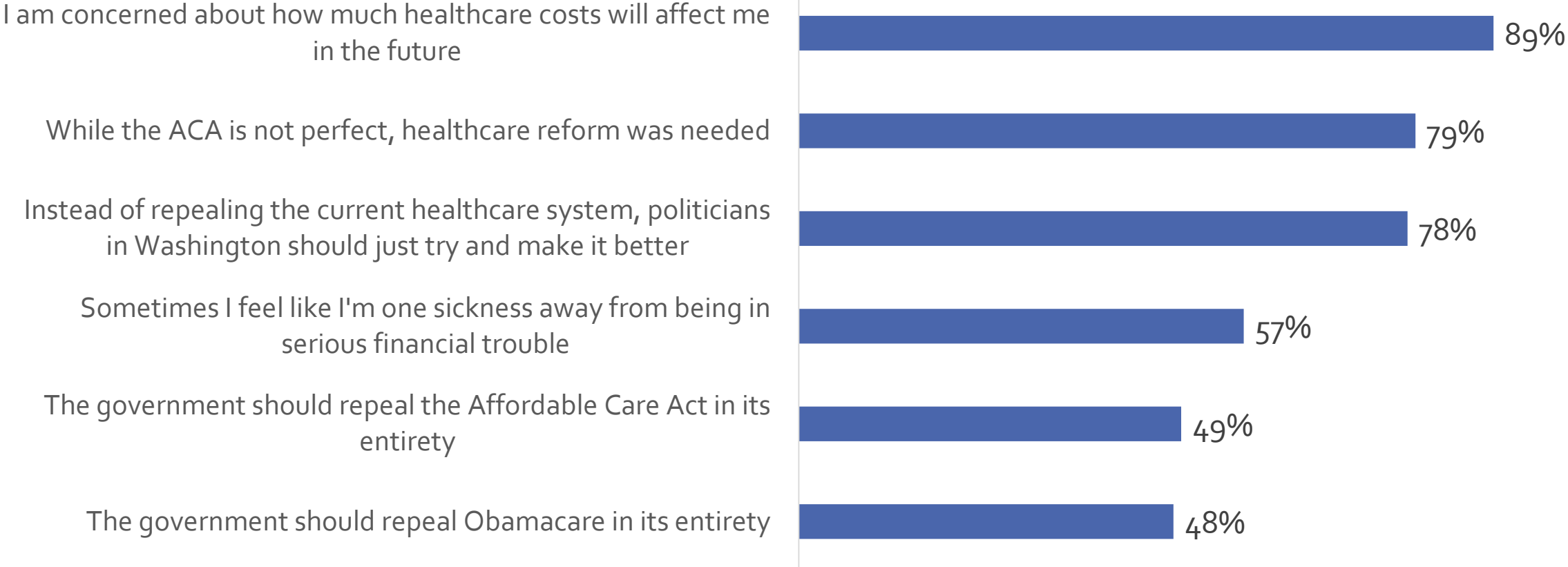


Q14: If a child came to you for career advice and said they wanted to become a physician, would you....?



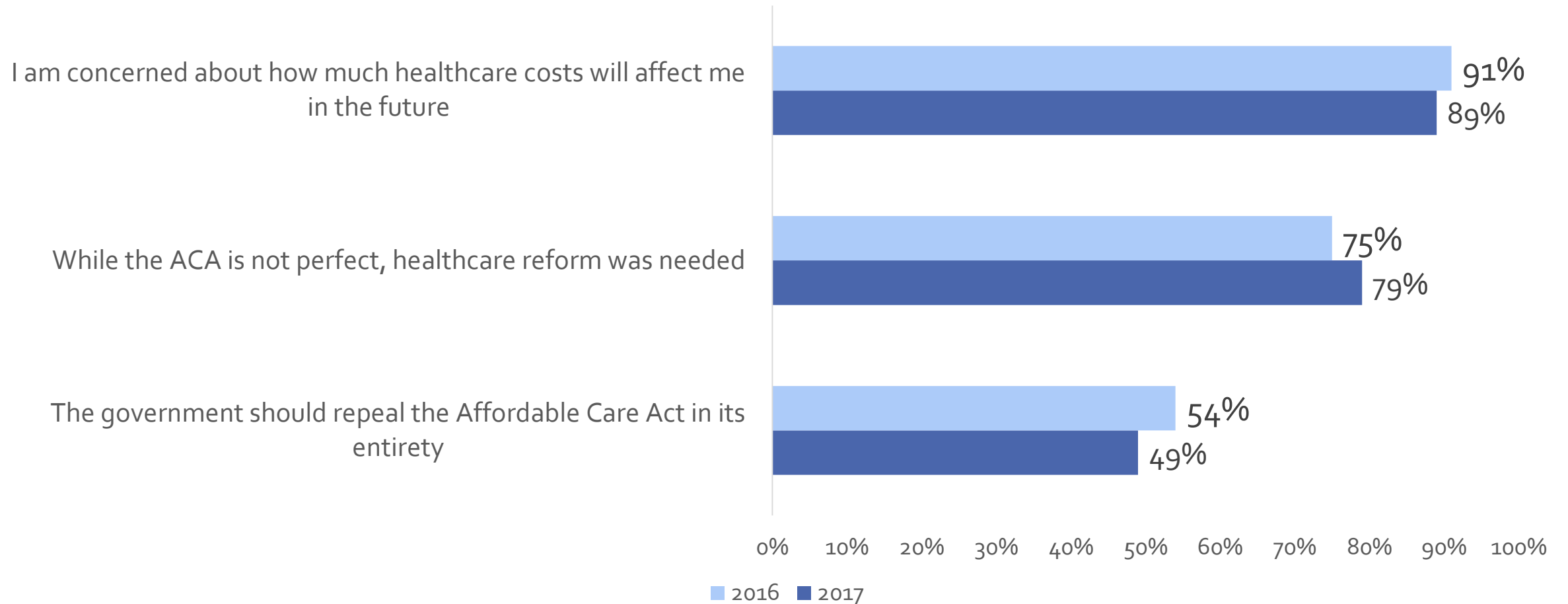
Among physicians, just half (51%) would recommend medicine as a career to their children or other young people.

Q15: How strongly do you agree or disagree with the following statements?



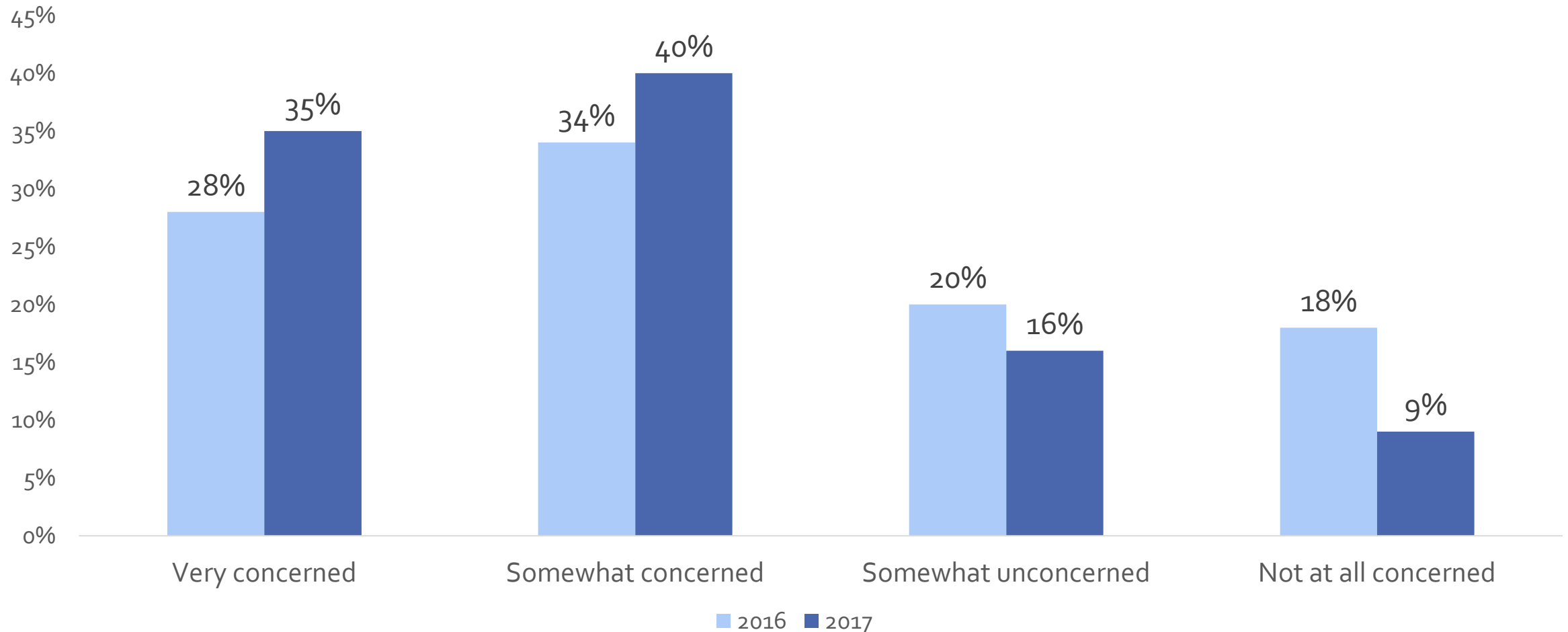
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
% saying Strongly/Somewhat Agree

Q15: How strongly do you agree or disagree with the following statements?

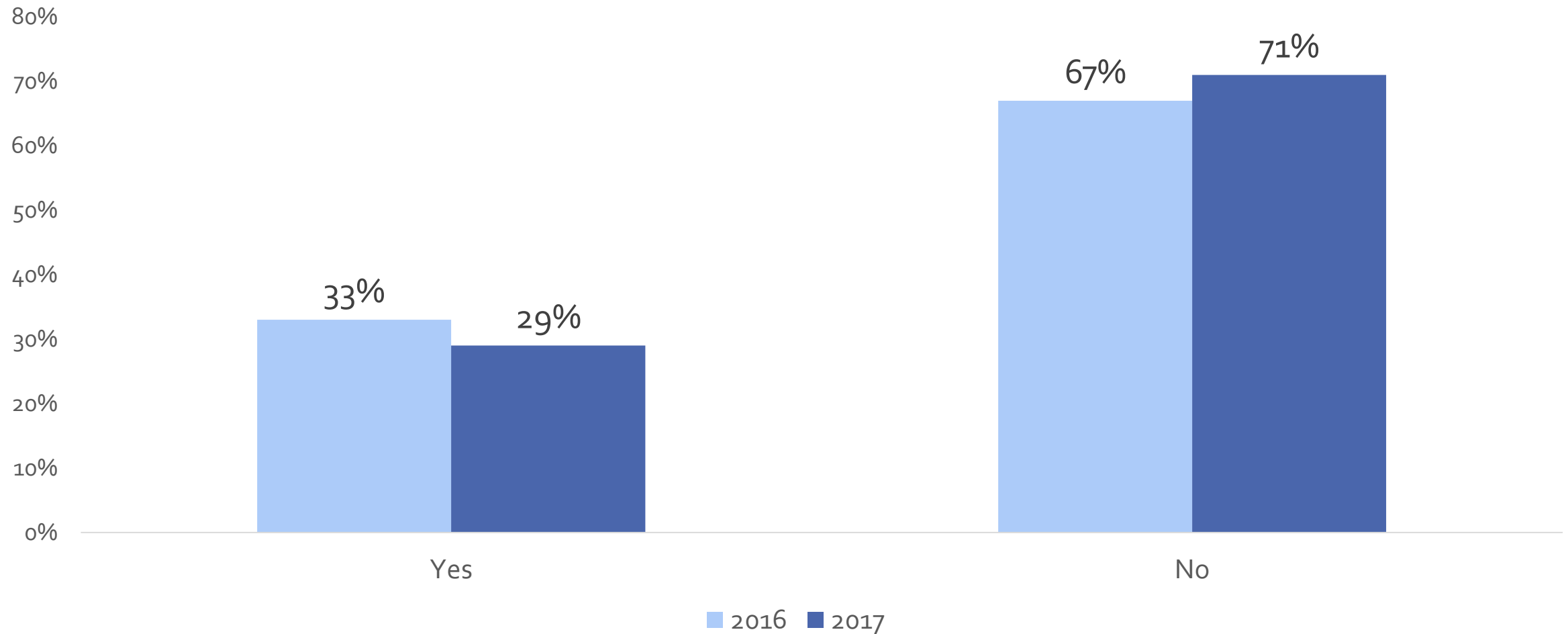


% saying Strongly/Somewhat Agree

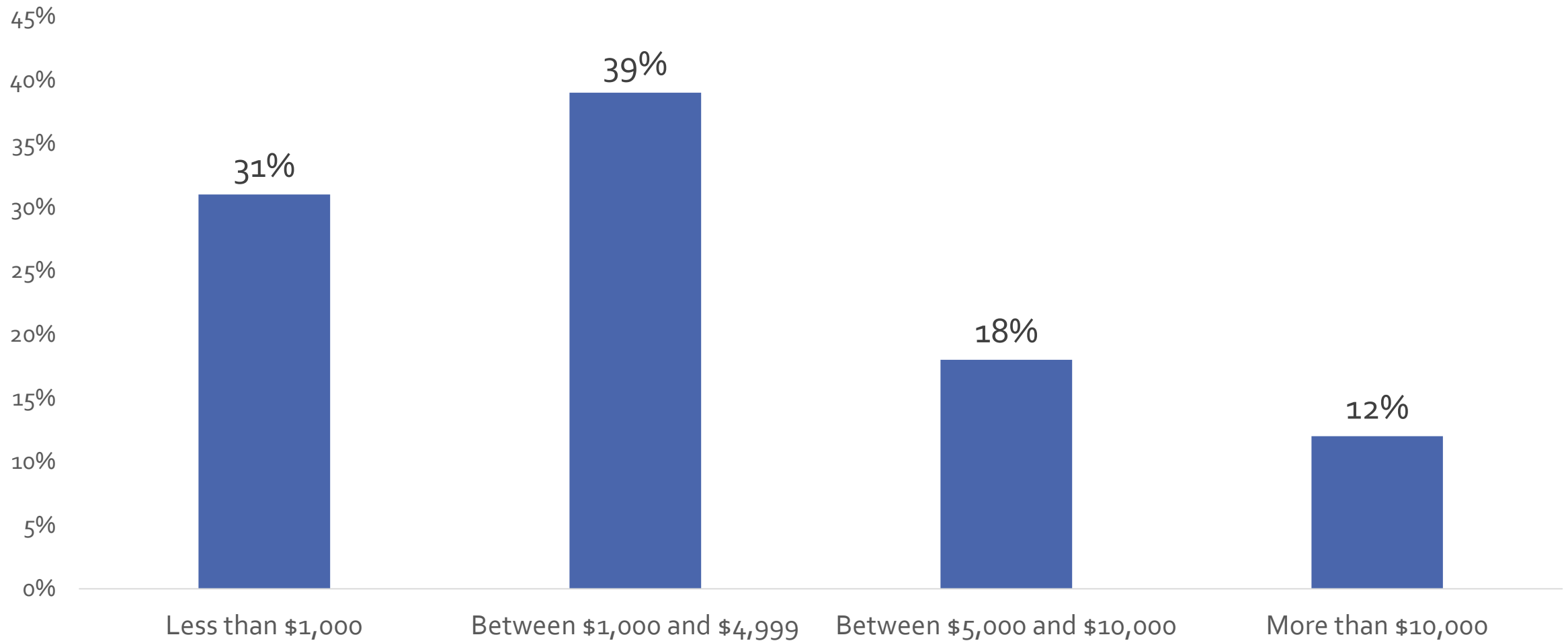
Q16: Now, please think about the costs of healthcare. To what extent are you concerned or not concerned with your ability to pay for any medical treatment if you were to get sick or injured?



Q17: Do you have any debt because of medical costs?

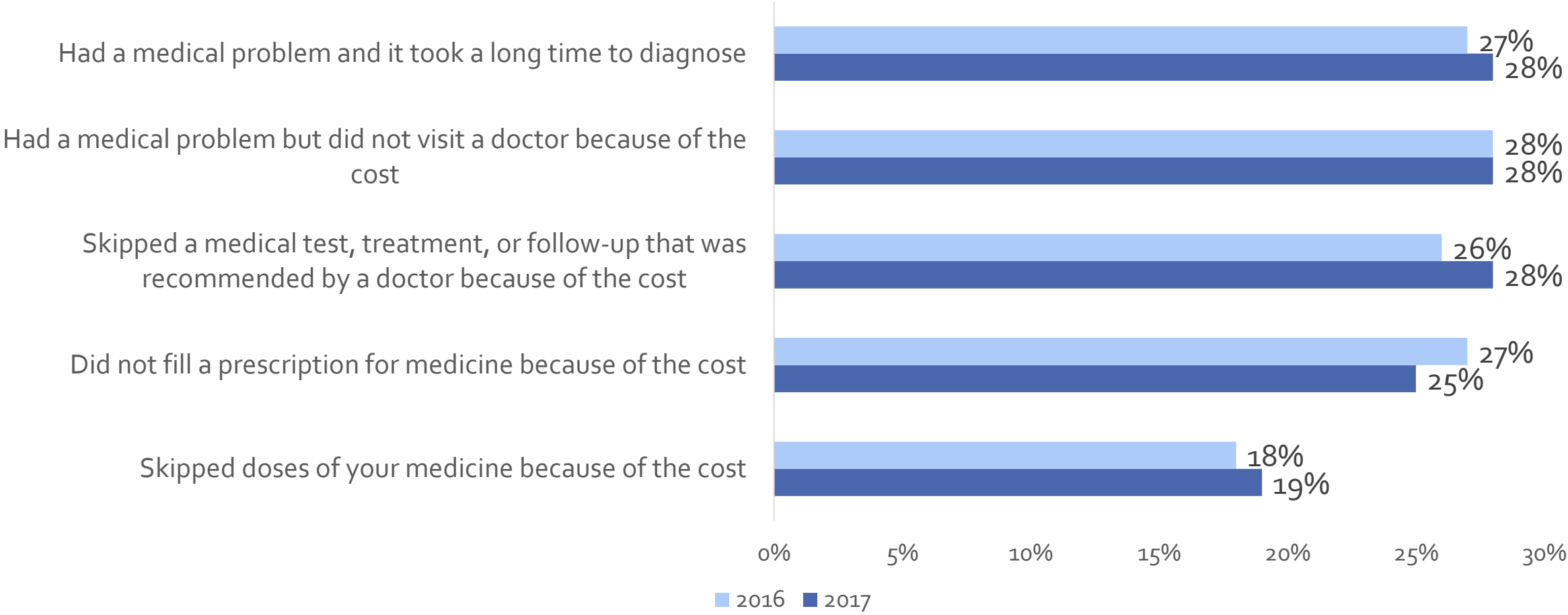


Q18: How much debt do you have?



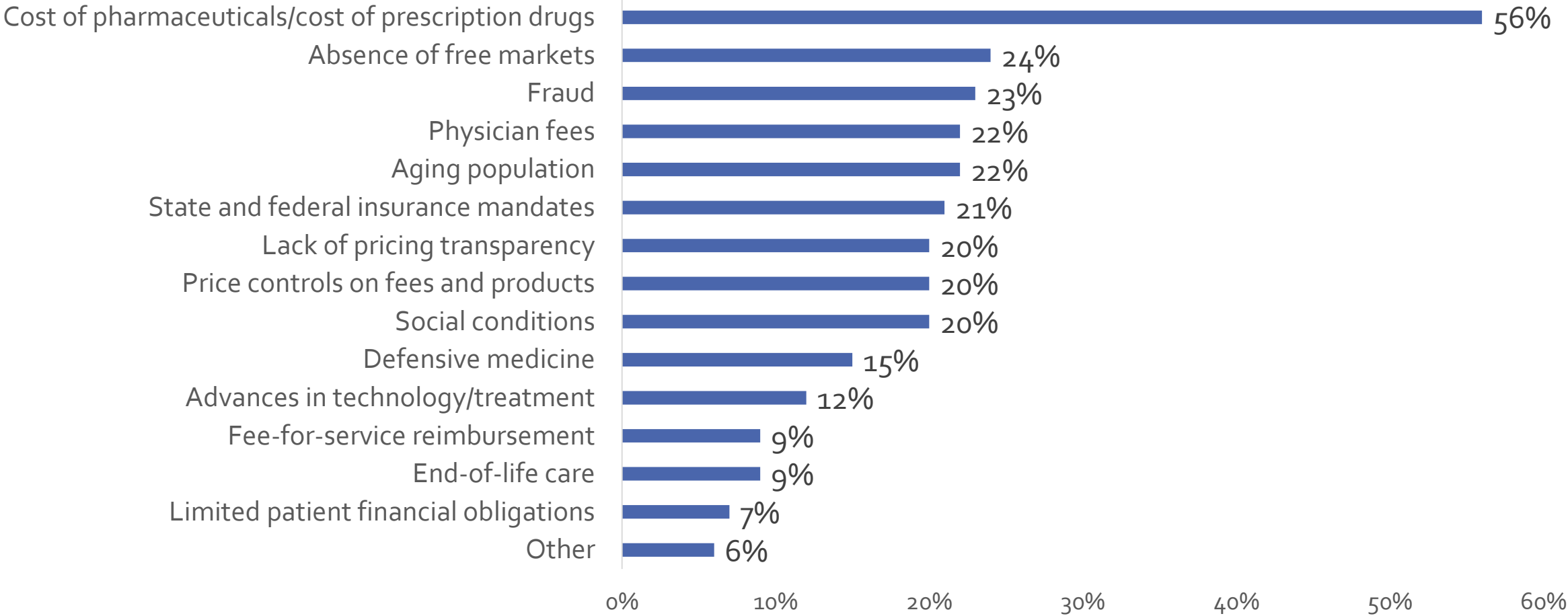
(Base: Have medical debt, N=505)

Q19: During the past 12 months, was there a time when you...?



% saying Yes

Q20: What are the top three factors that contribute to rising healthcare costs?

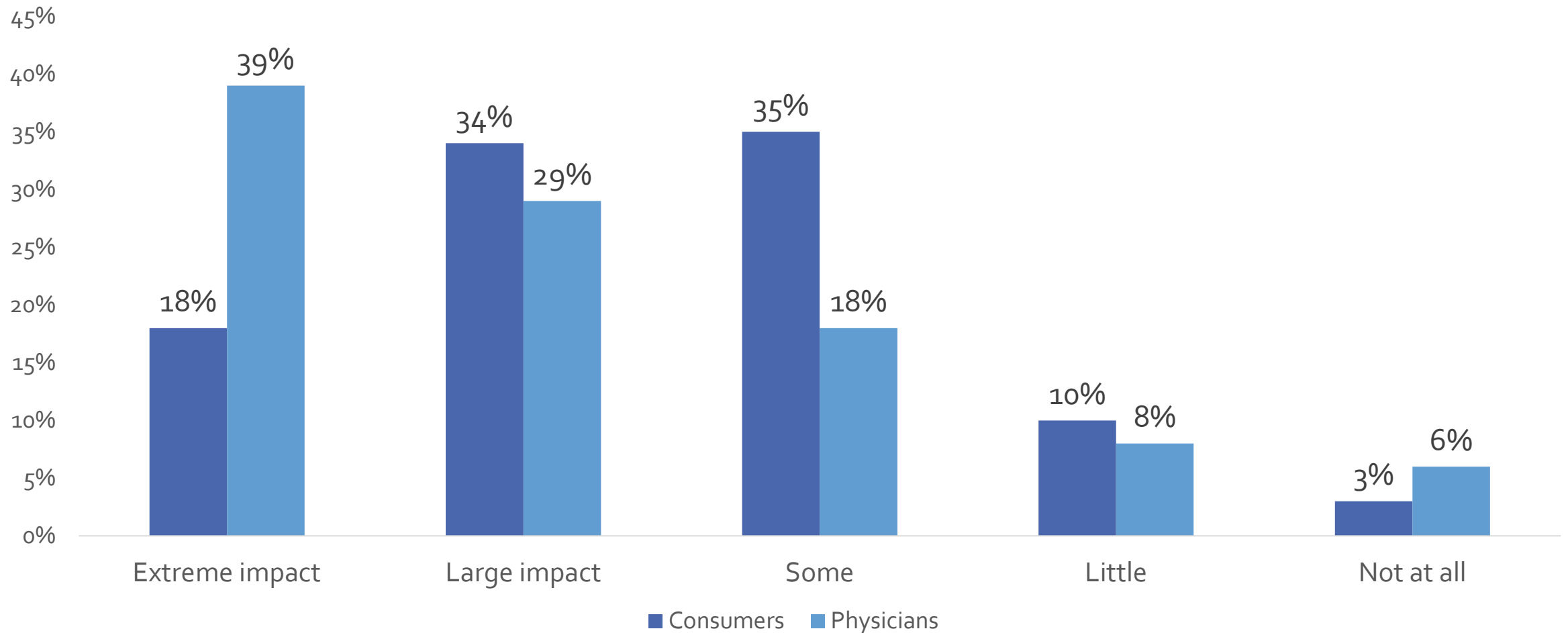


Q20: What are the top three factors that contribute to rising healthcare costs?

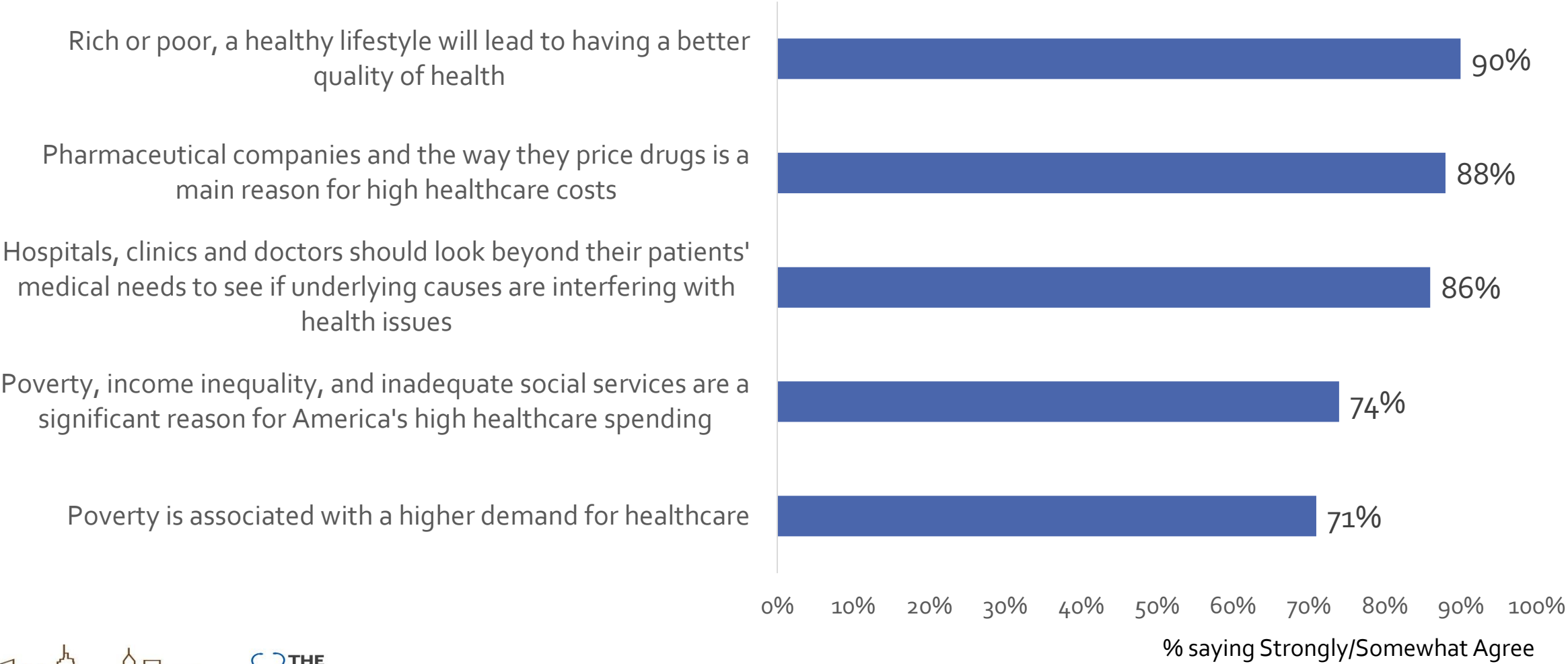
	2016	2017
	%	%
Cost of pharmaceuticals/cost of prescription drugs	59	56
Absence of free markets (lack of open competition between multiple parties to provide services at the lowest cost)	15	24
Fraud	33	23
Physician fees	20	22
Aging population	25	22
State and federal mandates (the requirement to have health insurance or pay a tax or fine if you do not)	26	21
Lack of pricing transparency (patients not having available information on the cost of prescriptions or medical tests or procedures in advance to help with healthcare decisions)	24	20
Price controls on fees and products (Government intervention to control costs)	16	20

	2016	2017
	%	%
Social conditions (poverty, drugs, violence, illegal immigration, etc.)	28	20
Defensive medicine (prescribing medications, procedures, or tests to avoid possible lawsuits rather than out of medical need)	19	15
Advances in technology/treatment	9	12
Fee-for-service reimbursement (The prevailing system where medical fees are paid based on services provided to each patient)	7	9
End-of-life care (Medical care for those who are terminally ill or have an incurable disease and are approaching the end of their life)	8	9
Limited patient financial obligations (limitations to the amount patients must pay out of pocket)	6	7
Other	5	6

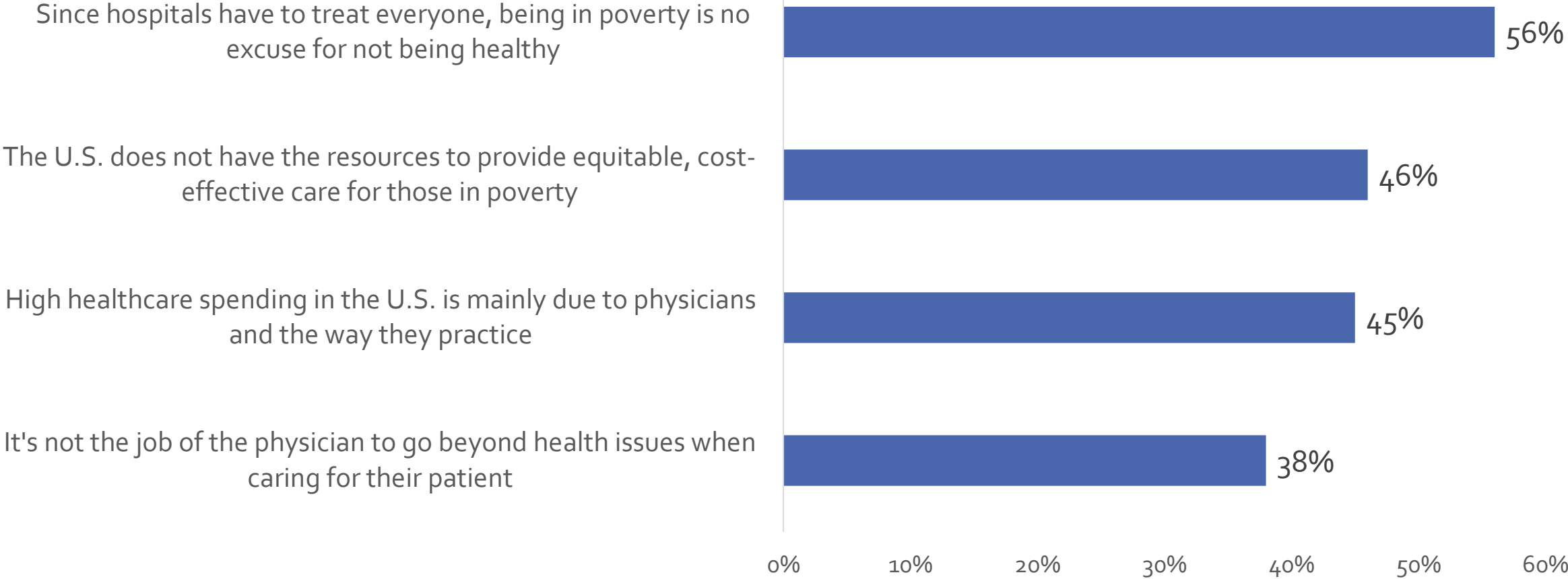
Q21: Experts have tied healthcare costs to poverty. What impact do you believe poverty has on healthcare costs?



Q22: How strongly do you agree or disagree with the following statements?



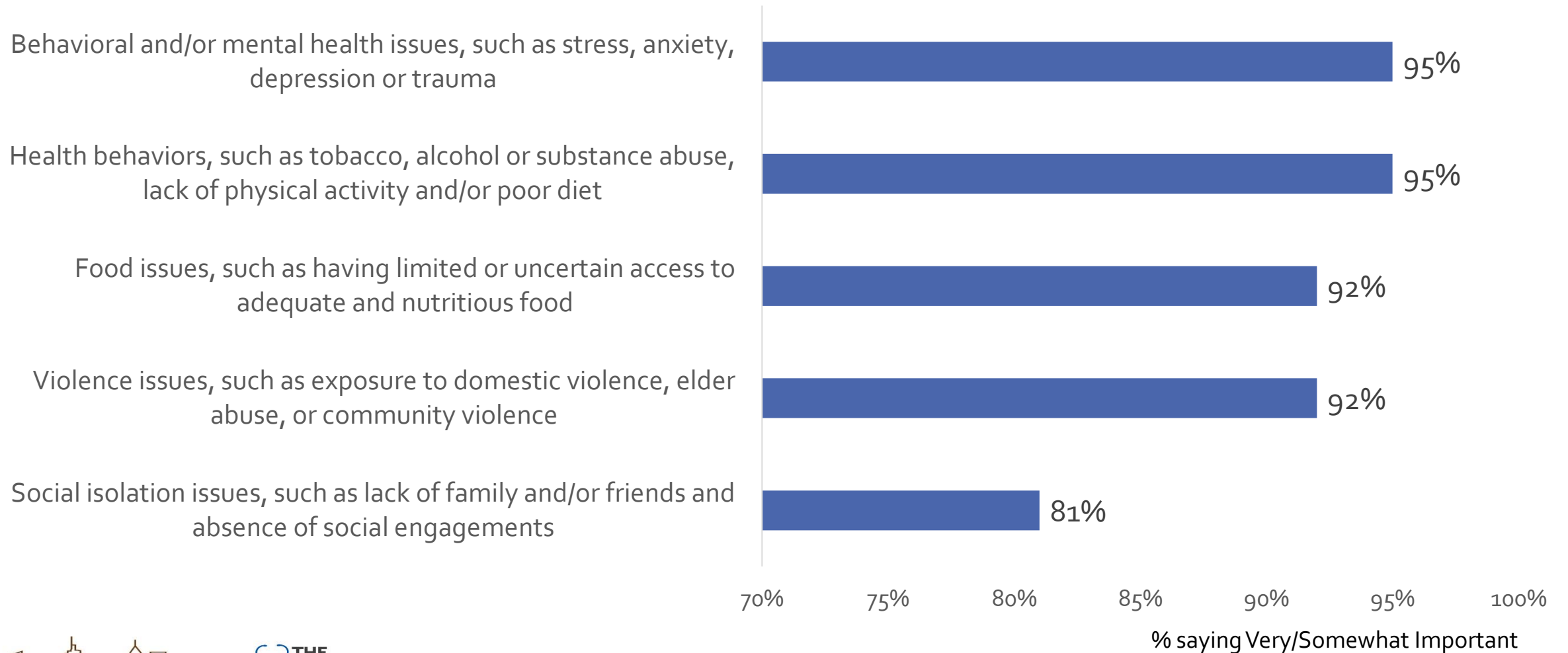
Q22: How strongly do you agree or disagree with the following statements?



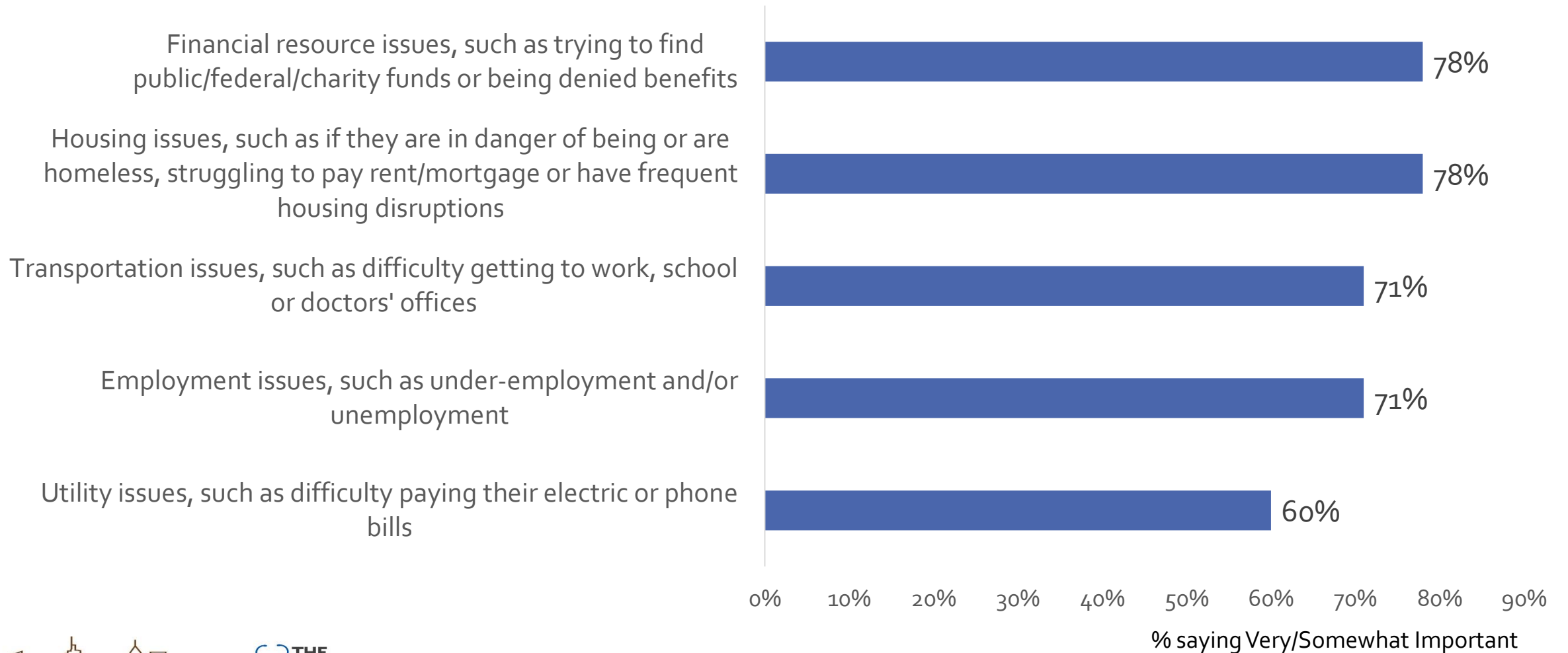
Q22: How strongly do you agree or disagree with the following statements?

	Agree (NET)	Strongly agree	Somewhat Agree	Disagree (NET)	Somewhat disagree	Strongly disagree
	%	%	%	%	%	%
Rich or poor, a healthy lifestyle will lead to having a better quality of health	90	52	38	10	7	2
Pharmaceutical companies and the way they price drugs is a main reason for high healthcare costs	88	45	43	12	9	3
Hospitals, clinics and physicians should look beyond their patients' medical needs to see if underlying causes are interfering with health issues	86	31	56	14	12	2
Poverty, income inequality and inadequate social services are a significant reason for America's high healthcare spending	74	25	49	26	20	6
Poverty is associated with a higher demand for healthcare	71	23	48	29	23	6
Since hospitals have to treat everyone, being in poverty is no excuse for not being healthy	56	19	38	44	28	16
The U.S. does not have the resources to provide equitable, cost-effective care for those in poverty	46	16	31	54	26	28
High healthcare spending in the U.S. is mainly due to physicians and the way they practice	45	11	34	55	40	15
It's not the job of the doctor to go beyond health issues when caring for their patients.	38	11	28	62	41	21

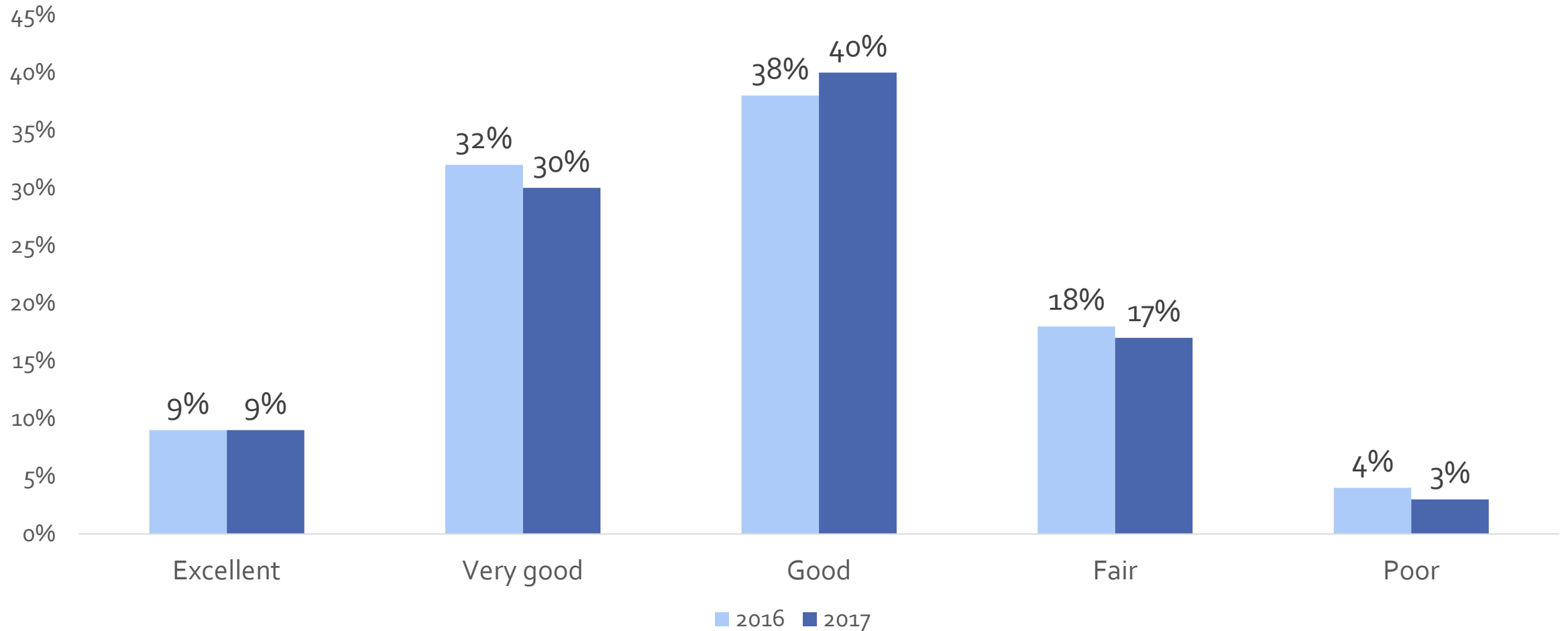
Q23: How important is it for a medical professional to know the following things about their patients?



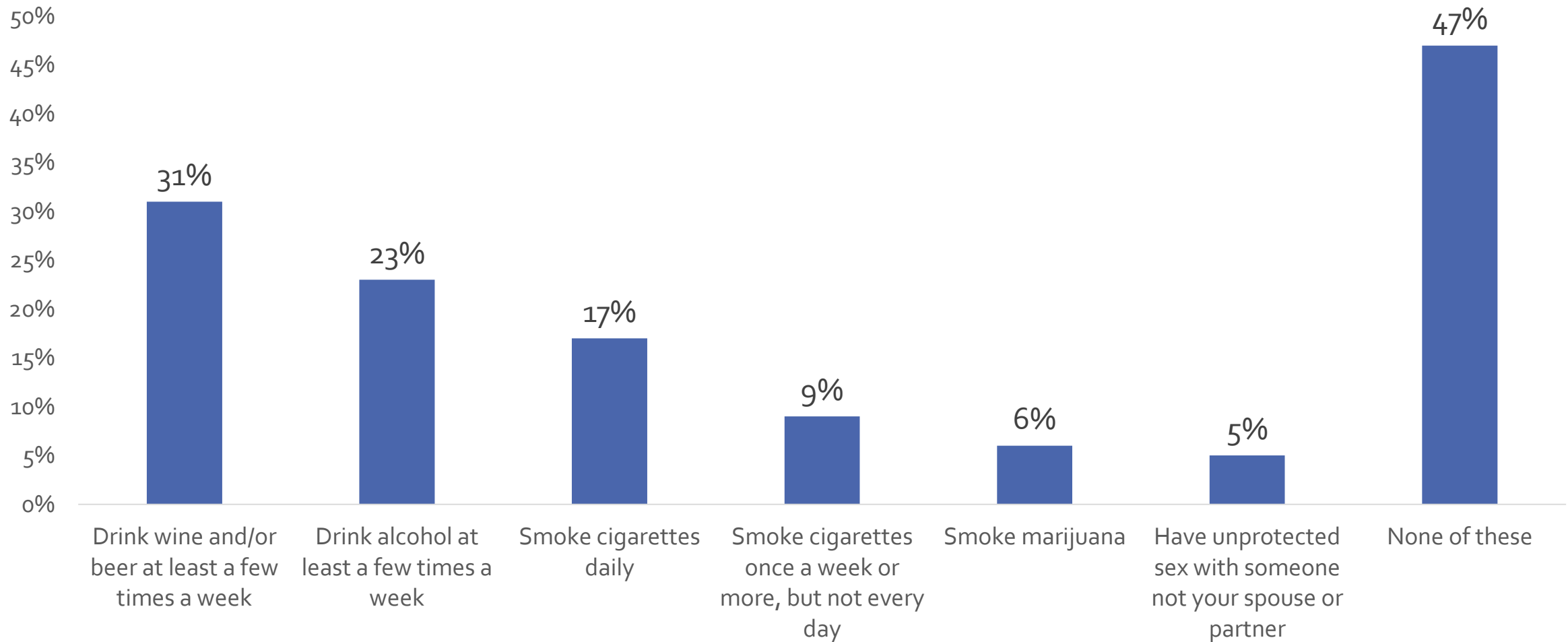
Q23: How important is it for a medical professional to know the following things about their patients?



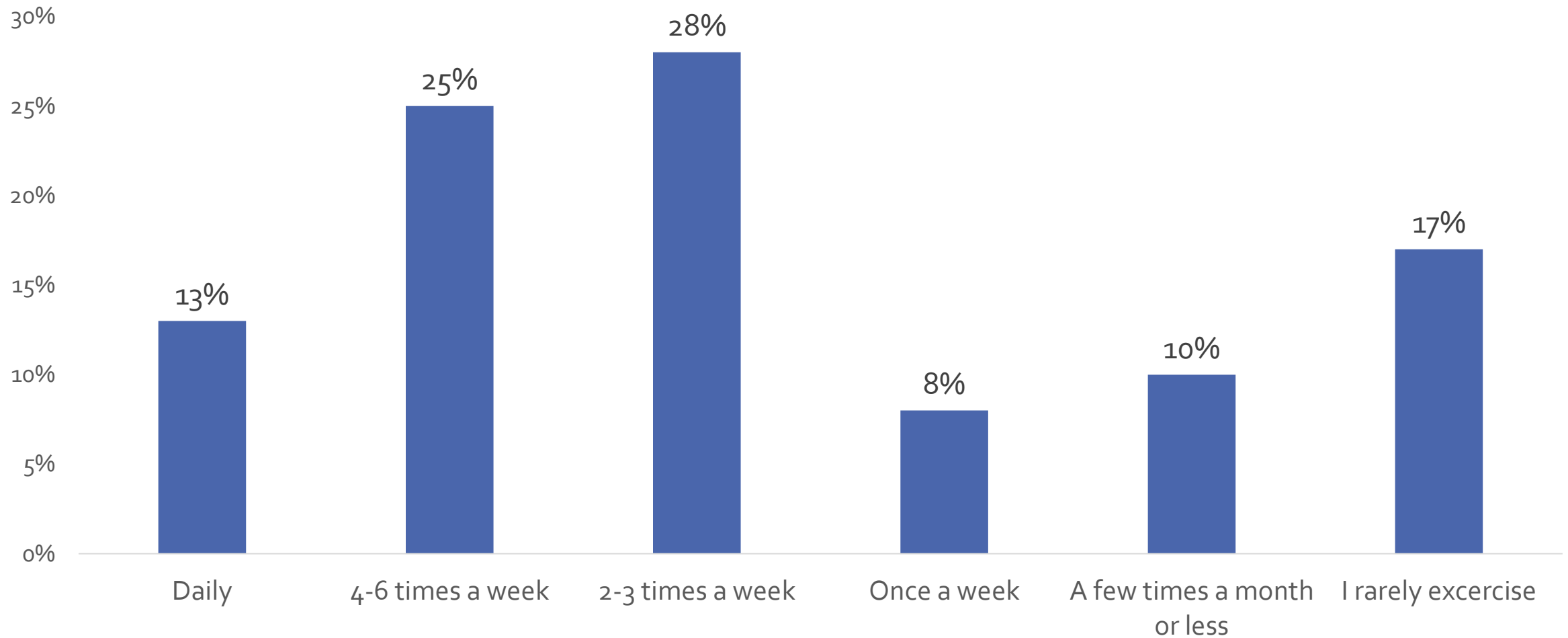
Q24: In general, would you say your health is...?



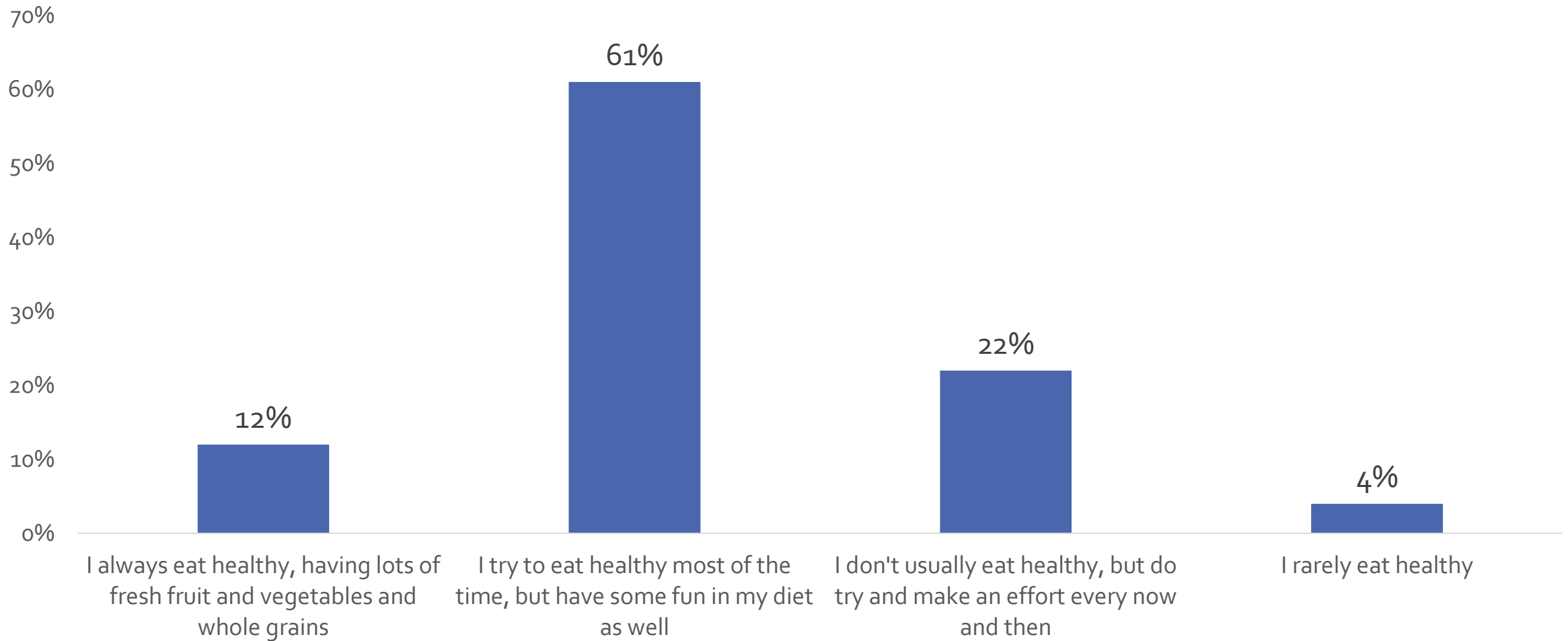
Q25: Which of the following do you do? Please select all that apply. Also, please remember that your answers are completely anonymous.



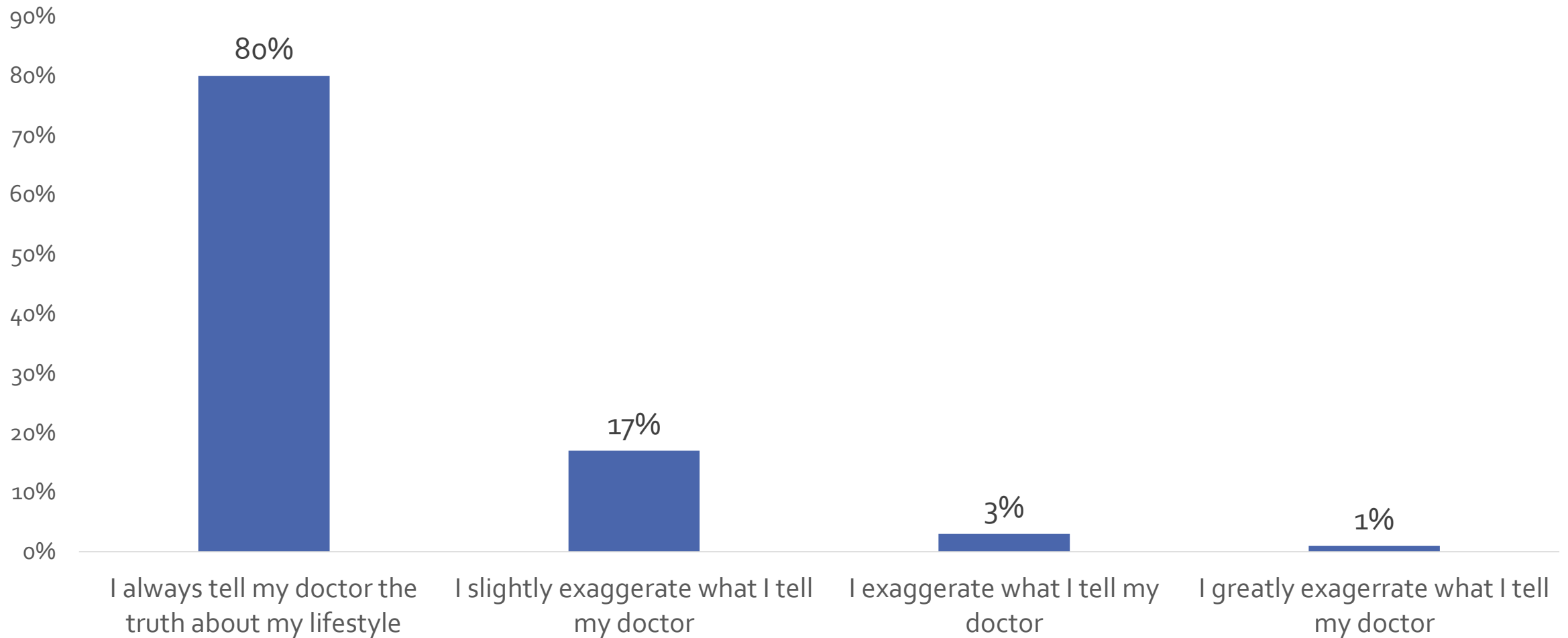
Q26: When it comes to exercise, how often do you usually do it?



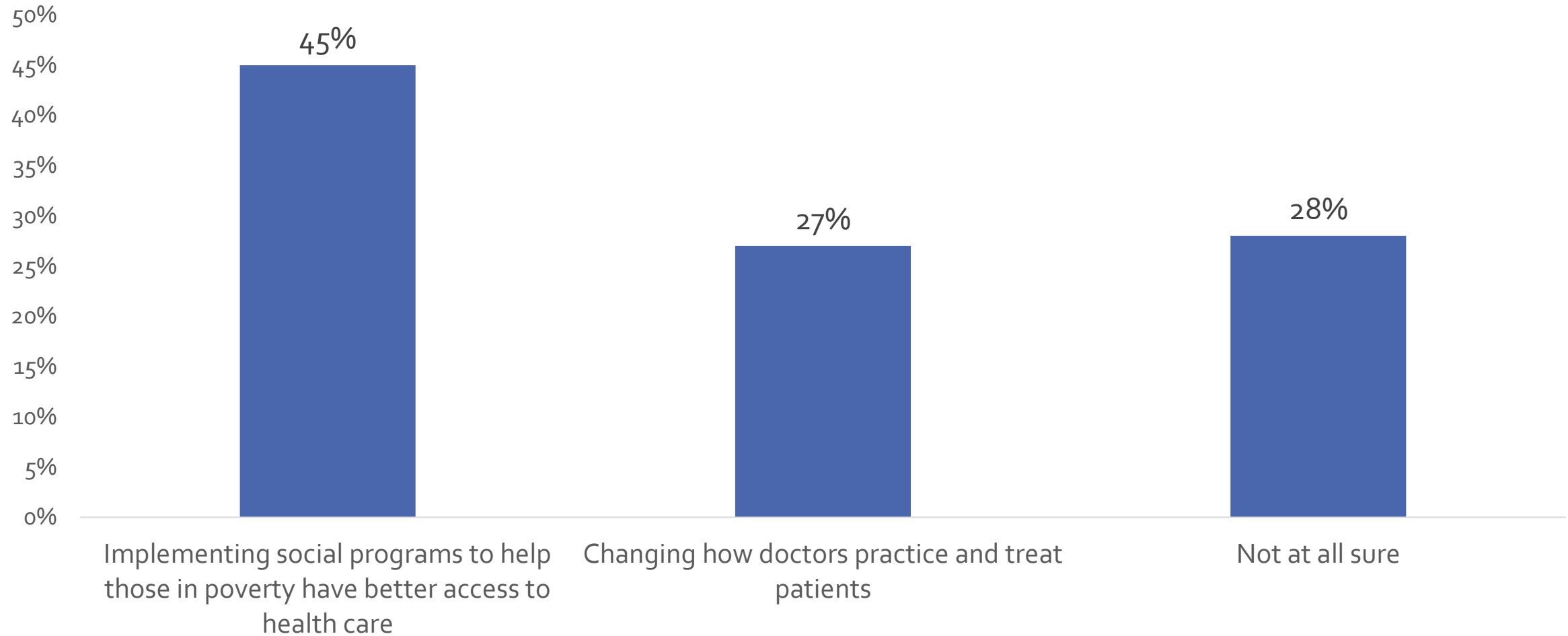
Q27: Which is closest to how you eat?



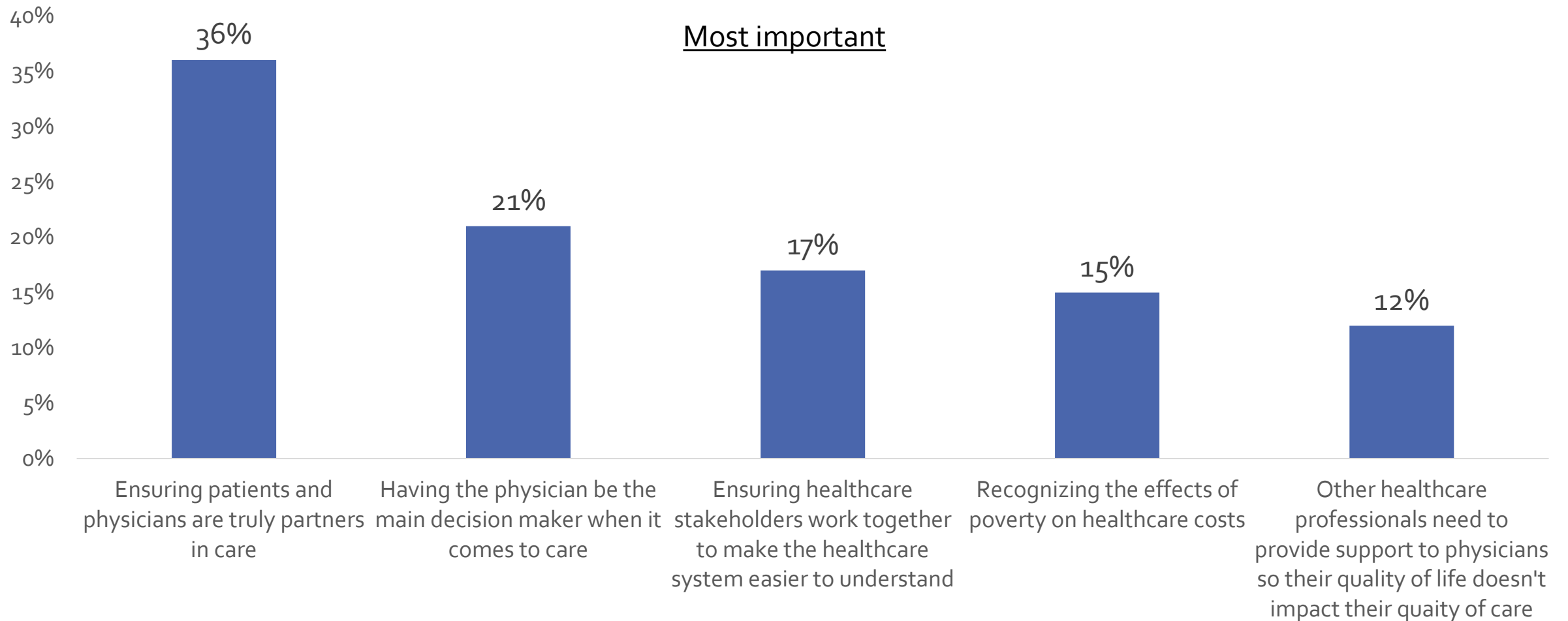
Q28: Which is closest to what you tell your doctor about your lifestyle?



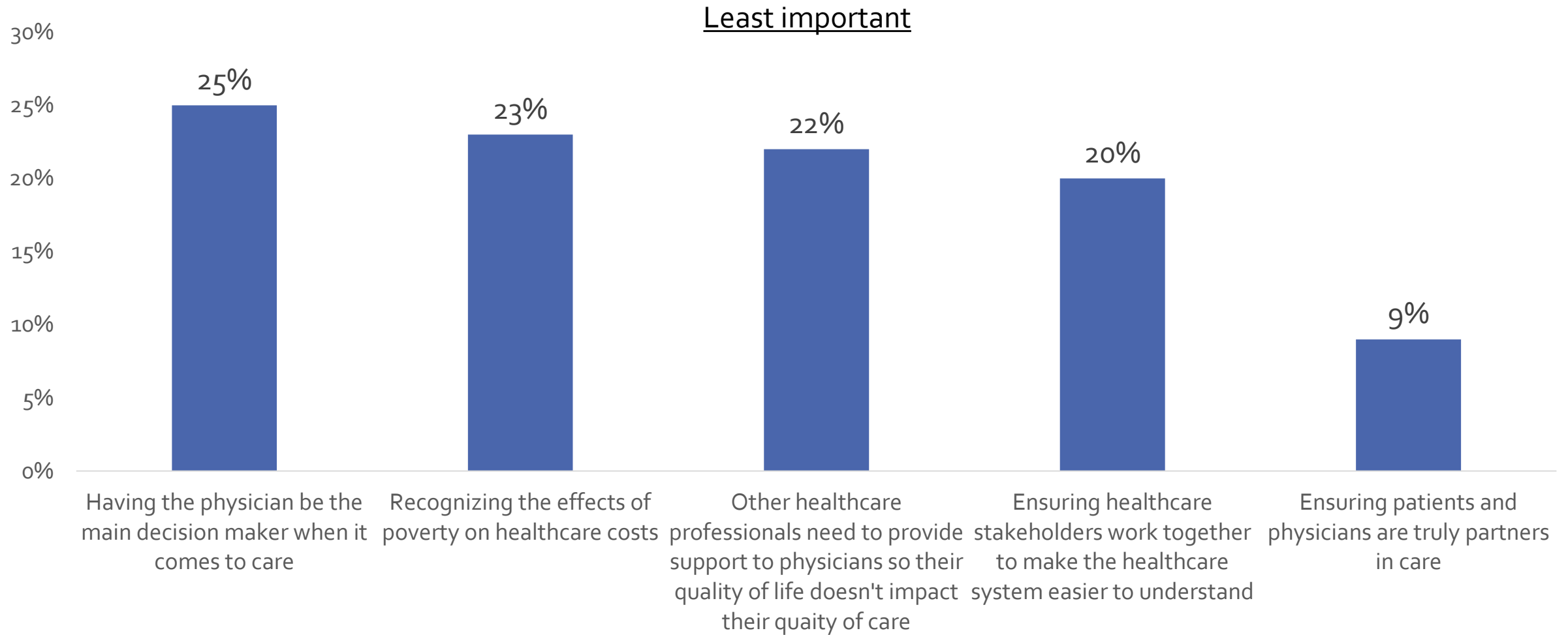
Q29: When it comes to healthcare, which is more important?



Q30: While all of these may be important, which one would you say is most important to the future of healthcare delivery and which one is least important?



Q30: While all of these may be important, which one would you say is most important to the future of healthcare delivery and which one is least important?



Q31: How strongly do you agree or disagree with the following statements?

All healthcare stakeholders must work together to address challenges that make the current system difficult to understand

91%

Physicians and patients create a true partnership representing the most essential element of a quality healthcare system

90%

As leaders of patient care, the physicians voice must be front and center in discussions around healthcare access, cost and quality

90%

Physicians are patient advocates and play a vital part in providing quality and affordable healthcare

90%

89% 90% 90% 90% 90% 90% 91% 91% 91% 91%

% saying Strongly/Somewhat Agree

Q31: How strongly do you agree or disagree with the following statements?

Physicians require support from other healthcare professionals as they struggle to provide care under increased pressures of regulation, changing payment and insurance models and overall uncertainty

89%

Physicians are guardians of quality and must be recognized as the key decision maker for patient care

87%

In any reform or evolution of the healthcare system, it is critical to recognize the pervasive debilitating effects of poverty on healthcare costs

81%

76% 78% 80% 82% 84% 86% 88% 90%

% saying Strongly/Somewhat Agree

Q31: How strongly do you agree or disagree with the following statements?

	Agree (NET)	Strongly agree	Somewhat Agree	Disagree (NET)	Somewhat disagree	Strongly disagree
	%	%	%	%	%	%
All healthcare stakeholders must work together to address challenges that make the current system difficult to understand	91	42	49	9	7	3
Physicians and patients create a true partnership representing the most essential element of a quality healthcare system	90	46	45	10	8	2
As leaders of patient care, the physician's voice must be front and center in discussions around healthcare access, cost and quality	90	41	49	10	9	2
Physicians are patient advocates and play a vital part in providing quality and affordable healthcare	90	42	48	11	9	2
Physicians require support from other healthcare professionals as they struggle to provide care under increased pressures of regulation, changing payment and insurance models and overall uncertainty	89	37	52	11	9	2
Physicians are guardians of quality and must be recognized as the key decision maker for patient care	87	37	50	14	11	3
In any reform or evolution of the healthcare system, it is critical to recognize the pervasive, debilitating effects of poverty on healthcare costs	81	33	49	19	17	2

Demographics

- When it comes to health insurance, 93% have it and 7% do not.
 - Of those who have health insurance, 50% have a plan purchased through an employer or union, 26% have it through Medicare, 10% through Medicaid or other state program, 9% through a plan they bought into on their own, 4% from TriCare, less than 1% from Alaska Native, Indian Health Service or Tribal Health Service and 2% from some other source
- For age, 20% are between 27-34, 23% between 35-44, 21% between 45-54, 21% between 55-64, and 16% between 65 and 75.
- Gender is divided with 49% male and 51% female
- Regionally, 20% are in the Northeast, 16% in the Midwest, 39% in the South and 25% in the West
 - For urbanicity, 49% are suburban, 32% urban and 19% rural

Demographics, continued

- Looking at employment, 50% are employed full time, 8% employed part-time and 5% are self-employed, 7% are not employed, 22% retired, 7% are homemakers and 1% students.
- In terms of income, 16% have a household income of less than \$25,000, 19% between \$25,000-\$49,999, 39% between \$50,000-\$99,999, 16% between \$100,000-\$149,999 and 11% \$150,000 and more.
- For education, 14% have a high school degree or less, 30% some college or an associate degree, 32% a bachelor degree or equivalent, 22% have a graduate degree.
- With regard to their family life , 61% are married, 24% are single, 10% are divorced, 4% are widowed, and 1% are separated
- And, for children, 36% have a child under the age of 18 in the household while 64% do not.