



Presentation To:

The Partnership To Improve Patient Care

Findings From A National Survey Of Registered Voters

May 2015

Key Findings

- **Americans Are Satisfied With Their Own Insurance, But Somewhat Divided On The Healthcare System Overall**
- **Access To High Quality Care Is A Much Higher Priority Than Controlling Costs**
- **Voters Favor Comparative Effectiveness Institute That Provides Information, But Oppose Approaches That Would Affect Coverage Decisions**
- **Voters Had Major Concerns About Government Meddling And Denial Of Coverage Issues**
- **Voters Strongly Oppose A CER Institute Involved In Coverage Decisions Or Run By The Federal Government**
- **Voters Want More Information Regarding Cost (Particularly For Them) And Options, But Want To Make Decisions Themselves**




Methodology

**P
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- **National Survey Of 1,500 Registered Voters**
- **Interviews Conducted April 29 – May 5, 2015**
- **Margin Of Error +/- 2.5% Overall, Higher For Subgroups**

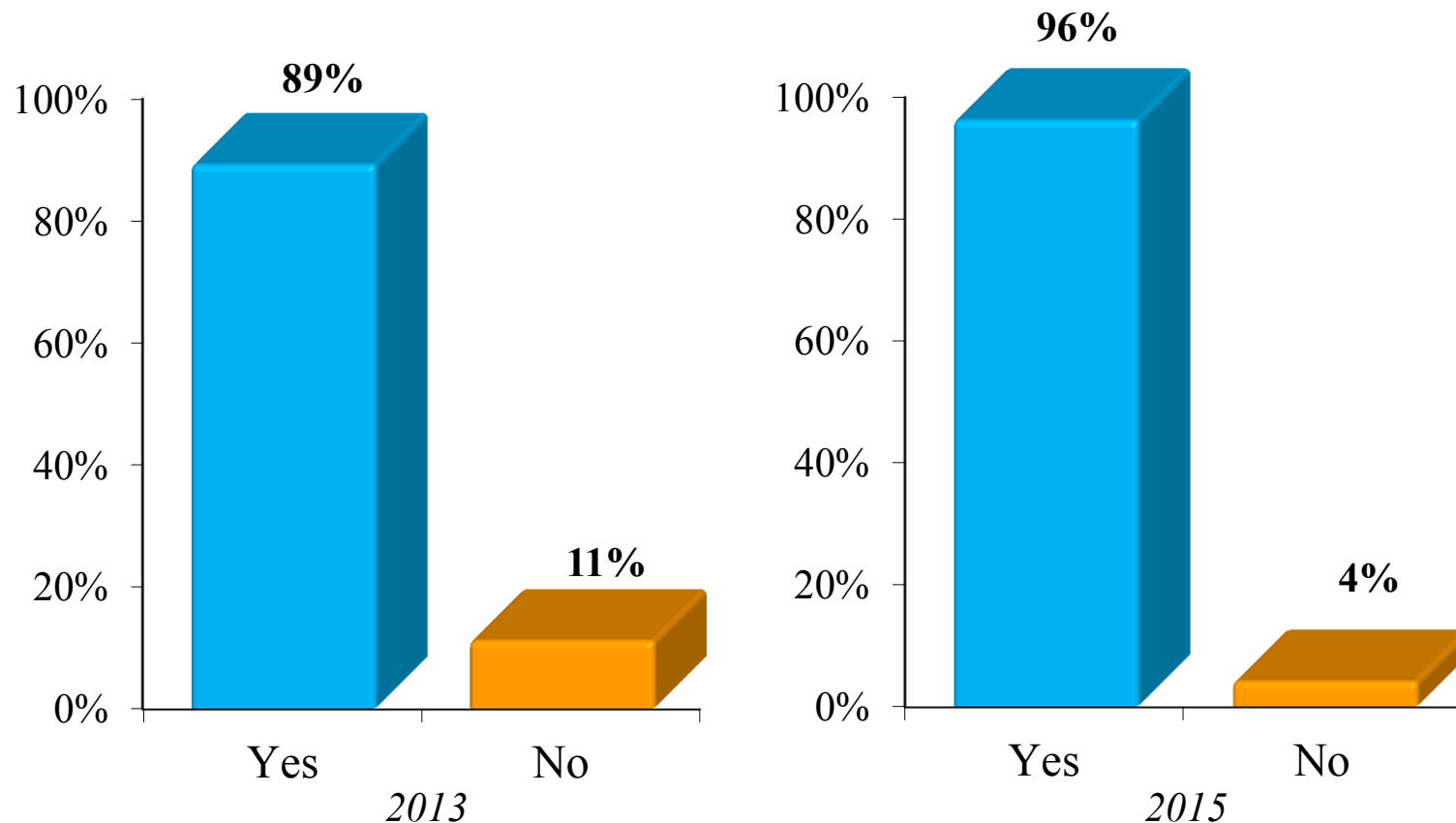




Americans Are Satisfied With Their Own Insurance, But Somewhat Divided On The System Overall

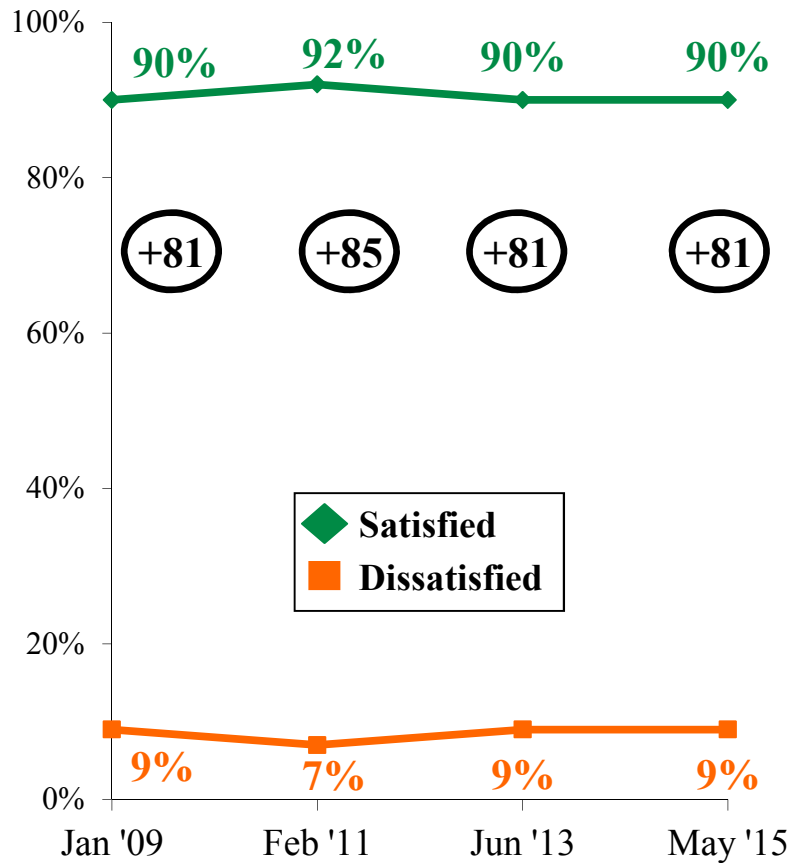
The Number Of People With Health Insurance Increased Since 2013

Are you currently covered by health insurance?

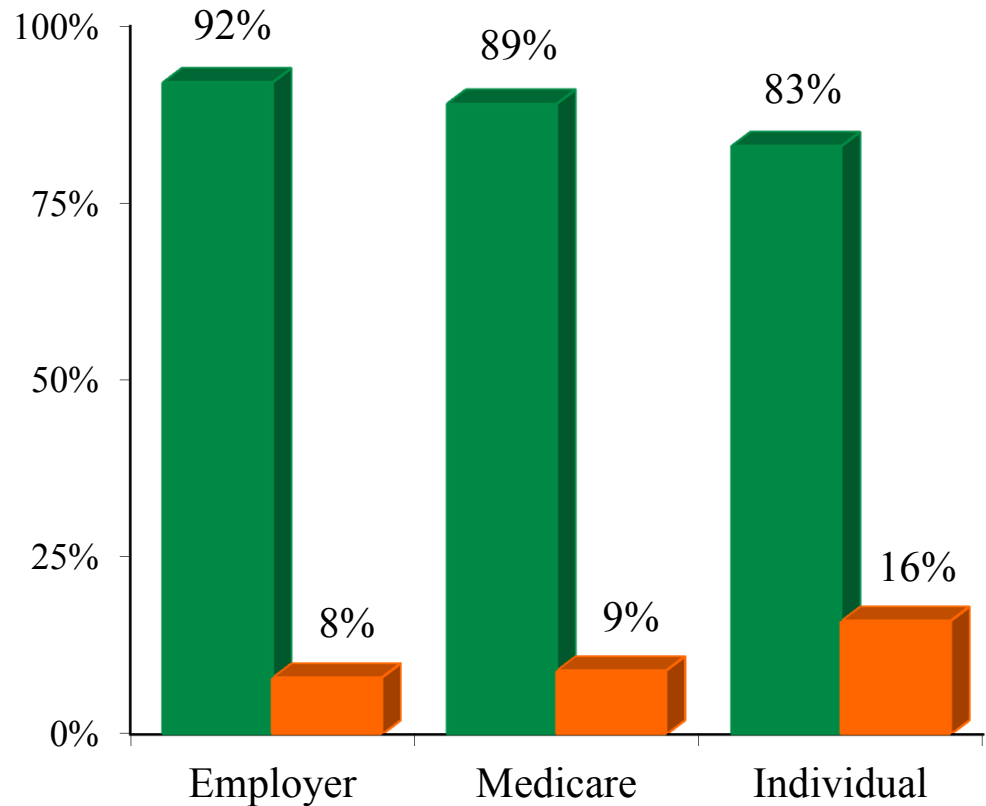


Those With Health Insurance Are Overwhelmingly Satisfied With It

*Among those with insurance (n=1433):
How satisfied are you with your health insurance coverage?*

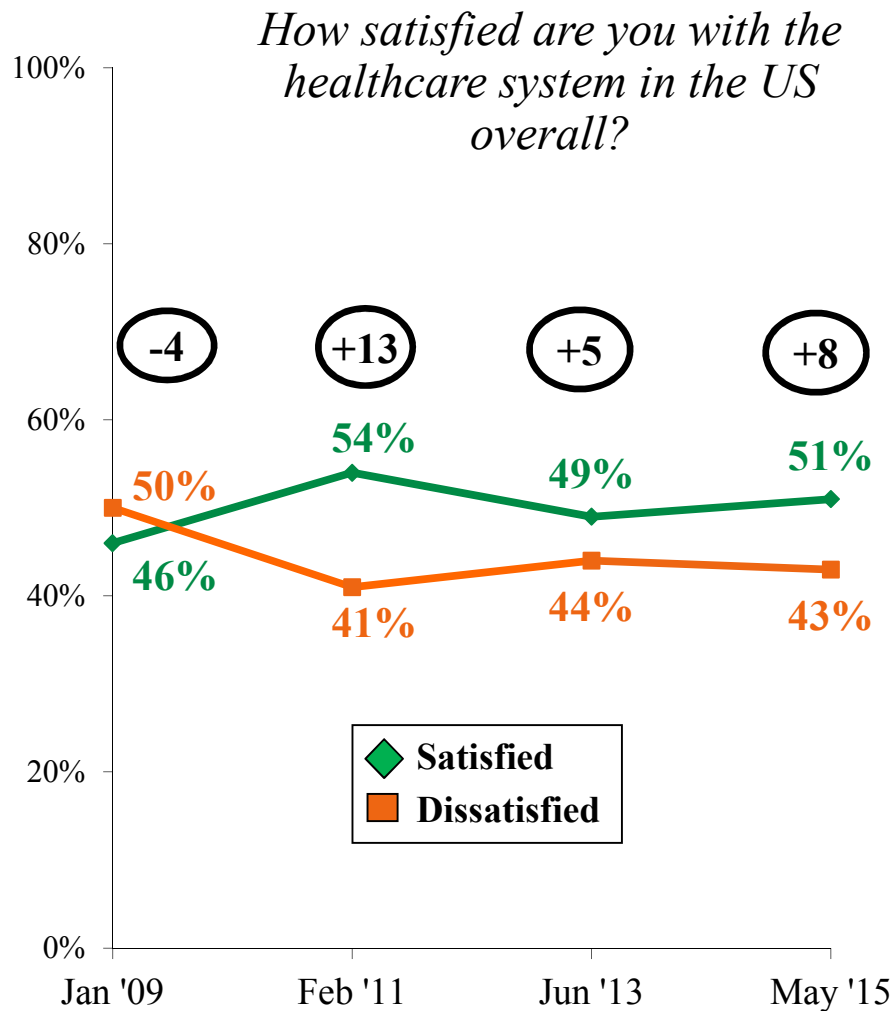


Satisfaction By Health Coverage:



Only A Slim Majority Are Satisfied With The US Healthcare System Overall

Republicans And The Uninsured Are Least Satisfied



By Key Group		
	Satisfied	Dissatisfied
Democrat	56%	38%
Independent	51%	43%
Republican	43%	51%
18-29	57%	37%
30-39	51%	46%
40-49	48%	48%
50-59	44%	50%
60+	53%	38%
White	49%	46%
Hispanic	51%	42%
Black	59%	35%
Northeast	55%	40%
Midwest	52%	42%
South	50%	43%
West	47%	48%
Employer HC	49%	46%
Medicare	54%	37%
Medicaid	60%	32%
Individual HC	53%	43%
Uninsured	39%	52%



A photograph of a CT scanner in a clinical setting. The scanner is white and has a digital display on top showing '10785 00'. In the background, there is a control panel and a cart with supplies. The floor is blue. A white text box with a blue border is overlaid on the image, containing the text:

Access To High Quality Care Is A Much Higher Priority Than Controlling Costs

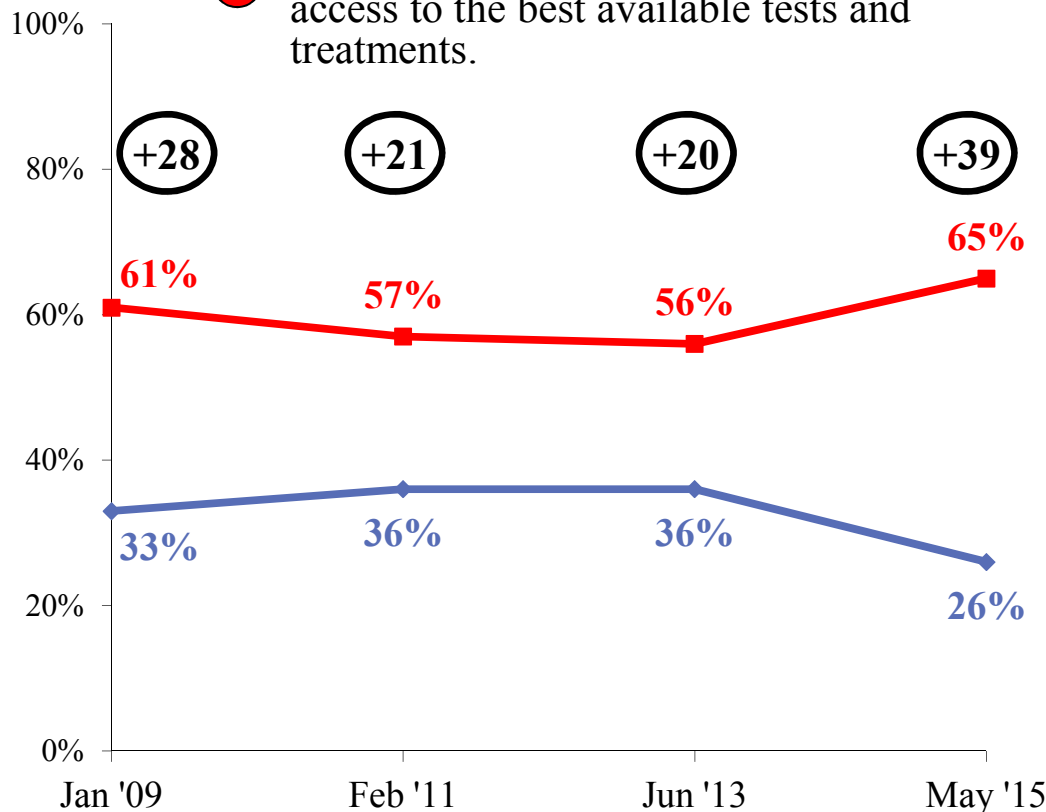
Access To The Best Tests/Treatments Is Taking An Increasing Priority Over Holding Down Costs

Quality Is More Important Than Cost In Every Subgroup

Which of the following do you think should be the more important priority:

Statement A: Holding down the cost of health care.

Statement B: Making sure patients have access to the best available tests and treatments.



By Key Group		
	Cost	Quality
Democrat	24%	69%
Independent	24%	67%
Republican	33%	59%
18-29	22%	74%
30-39	25%	69%
40-49	31%	59%
50-59	30%	60%
60+	25%	66%
White	27%	64%
Hispanic	24%	66%
Black	26%	70%
Northeast	23%	68%
Midwest	28%	65%
South	25%	65%
West	29%	63%
Employer HC	27%	64%
Medicare	25%	67%
Medicaid	24%	71%
Individual HC	30%	62%
Uninsured	31%	62%

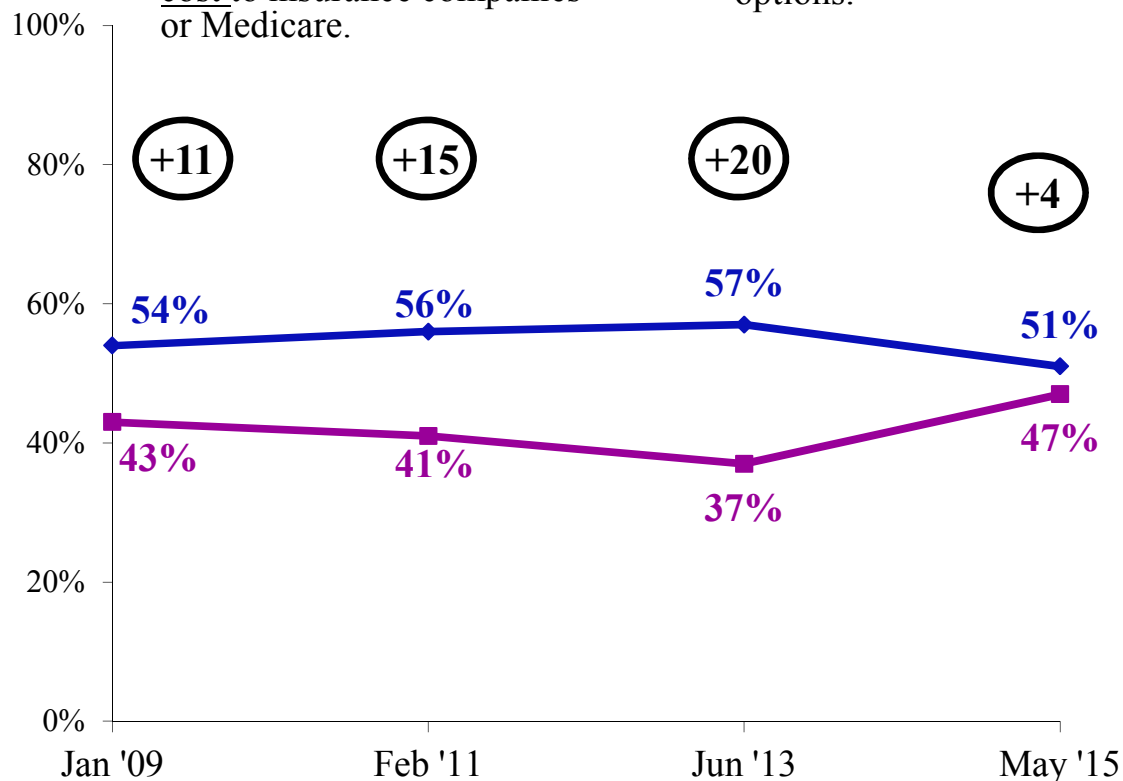


A Declining Majority Want Efficacy To Be The Only Criterion, While An Increasing Minority Want Cost Taken Into Account As Well

Which of the following statements comes closer to your point of view:

Statement A: When deciding how to treat a patient's medical condition, doctors should choose whichever treatment they believe will be best for their patient, regardless of the cost to insurance companies or Medicare.

Statement B: When deciding how to treat a patient's medical condition, doctors should take into account both the effectiveness and the cost of the various treatment options.



By Key Group		
	Treatment	Effective/Cost
Democrat	49%	48%
Independent	52%	47%
Republican	51%	46%
18-29	45%	54%
30-39	50%	47%
40-49	48%	50%
50-59	55%	41%
60+	53%	45%
White	50%	47%
Hispanic	61%	37%
Black	54%	45%
Northeast	50%	48%
Midwest	50%	48%
South	51%	46%
West	51%	46%
Employer HC	50%	48%
Medicare	53%	45%
Medicaid	49%	48%
Individual HC	49%	48%
Uninsured	52%	43%





Voters Overwhelmingly Favor A Comparative Effectiveness Institute That Provides Information, But Oppose One Making Coverage Decisions

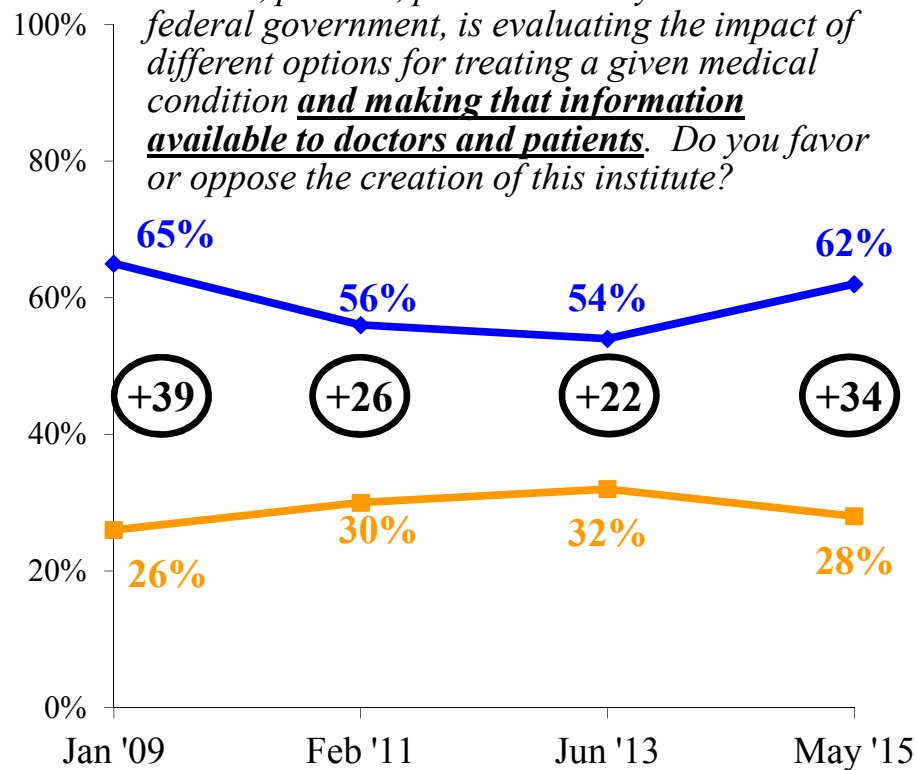


A 2 To 1 Majority Favors A Comparative Effectiveness Institute That Provides Information To Doctors & Patients

An Institute That Makes Coverage Decisions Is Still Opposed

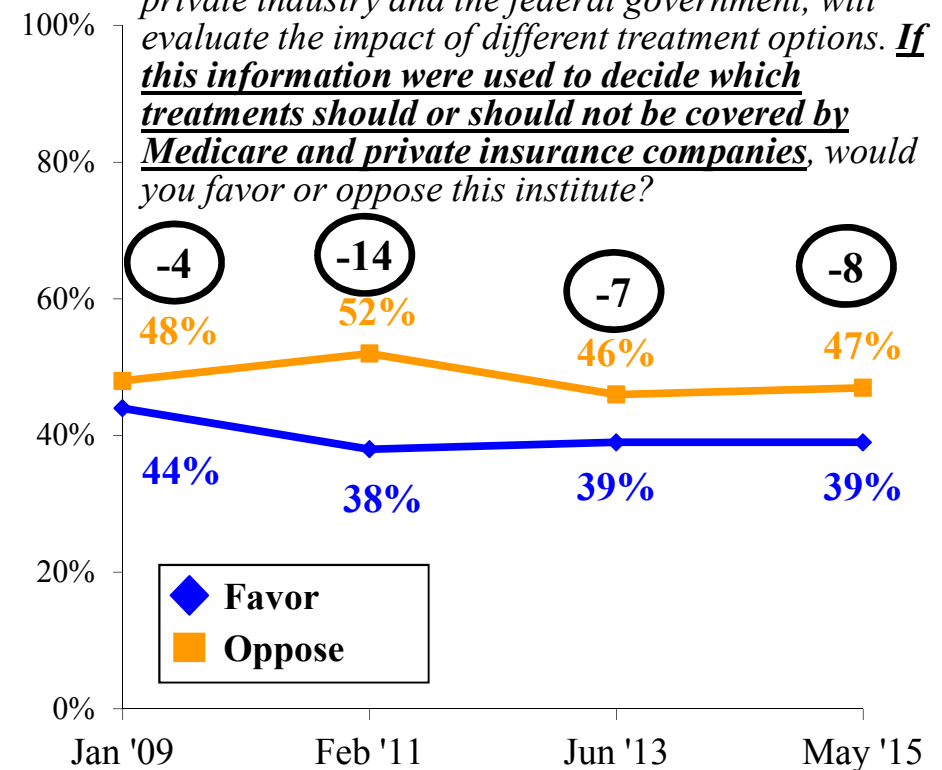
*CER Institute With Information**

Congress established an institute to compare the effectiveness of different treatments for medical conditions. This institute, run by an independent board with representatives from doctors, patients, private industry and the federal government, is evaluating the impact of different options for treating a given medical condition and making that information available to doctors and patients. Do you favor or oppose the creation of this institute?



*CER Institute With Coverage Decisions**

Congress established an institute to compare the effectiveness of different treatments for medical conditions. This institute, run by an independent board with representatives from doctors, patients, private industry and the federal government, will evaluate the impact of different treatment options. If this information were used to decide which treatments should or should not be covered by Medicare and private insurance companies, would you favor or oppose this institute?



**In 2009, did not include language on independent board. In 2011, described the coverage-decisions institute as under consideration, but the information-only institute as already established.*



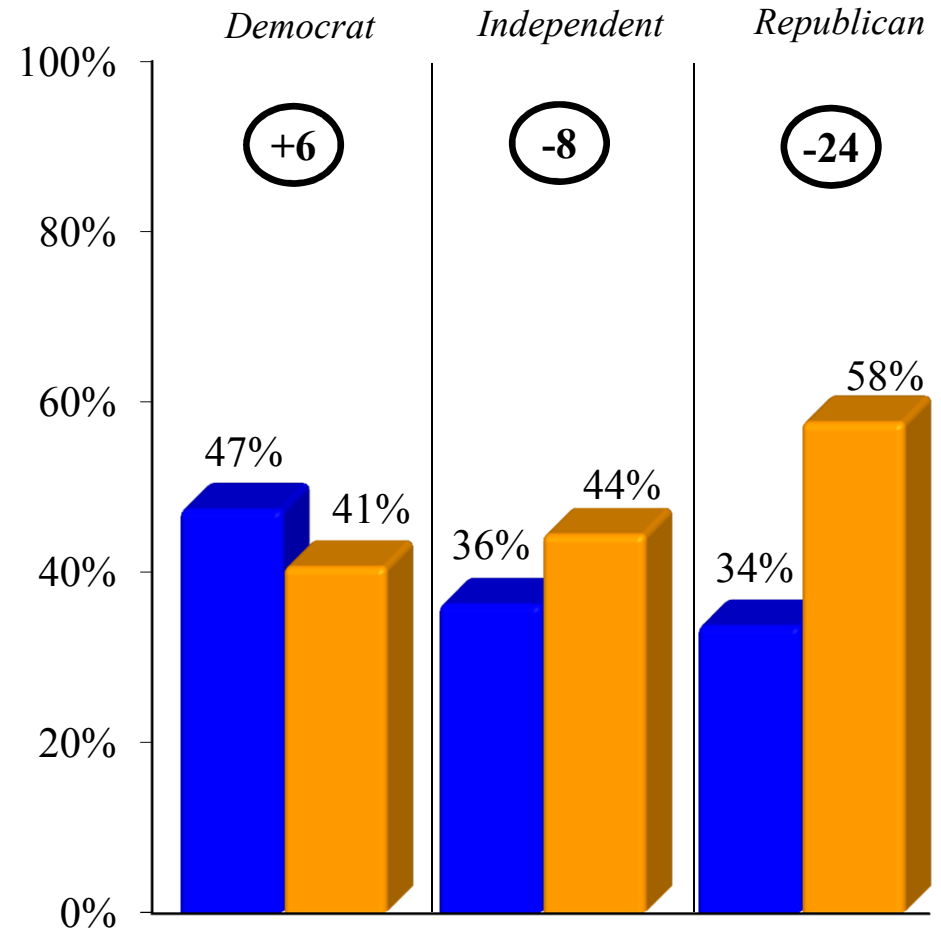
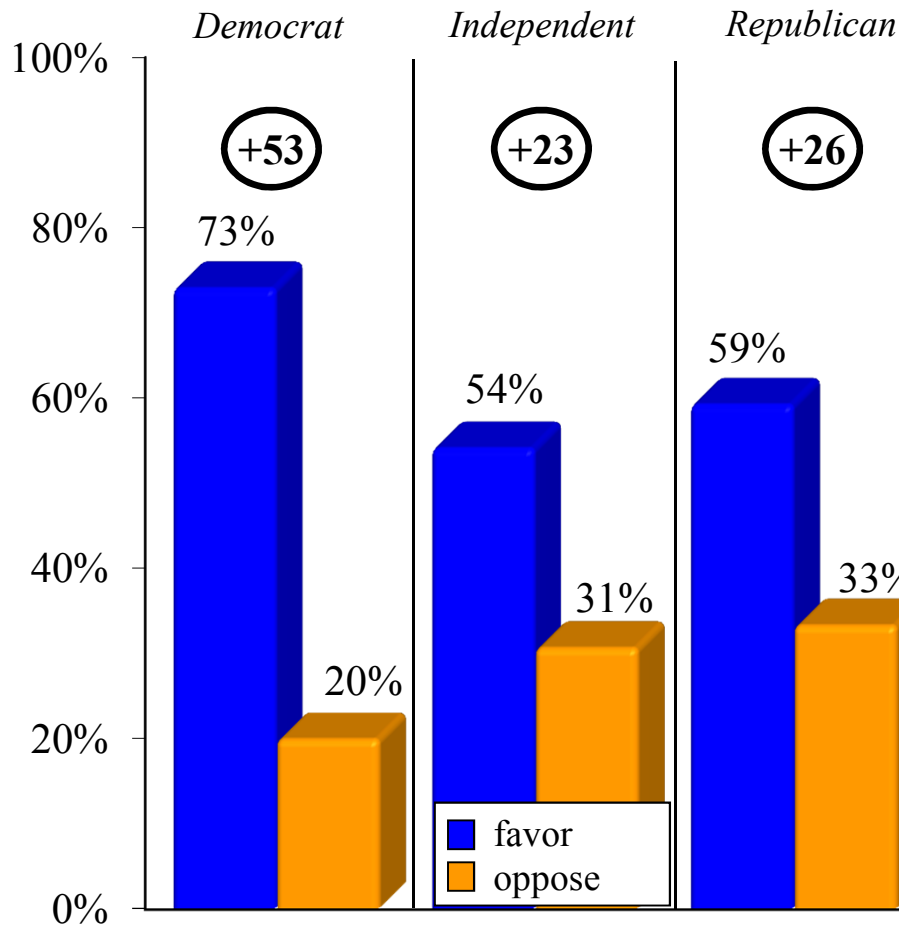
An Information Based CER Institute Is Supported Strongly Across Party While One That Makes Decisions Is Not



*CER Institute w/ Information
by Party ID*



*CER Institute w/ Coverage Decisions
by Party ID*



All Age Groups Favor An Information Based CER Institute

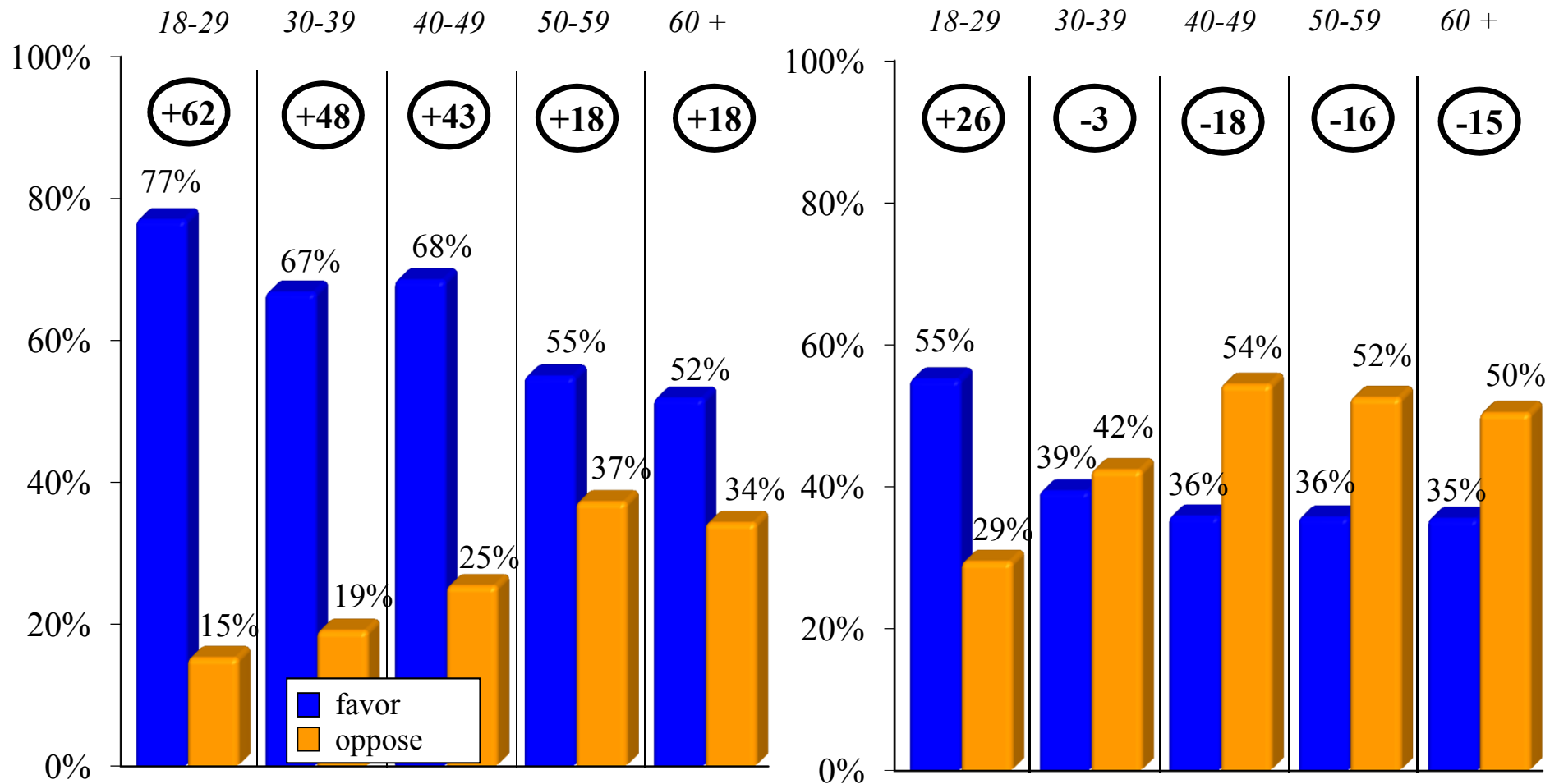
Only 18-29 Year Olds Favor A Coverage-Based Institute



*CER Institute w/ Information
by Age*



*CER Institute w/ Coverage Decisions
by Age*



Whites, Hispanics, & Blacks All Support An Information-Based CER Institute

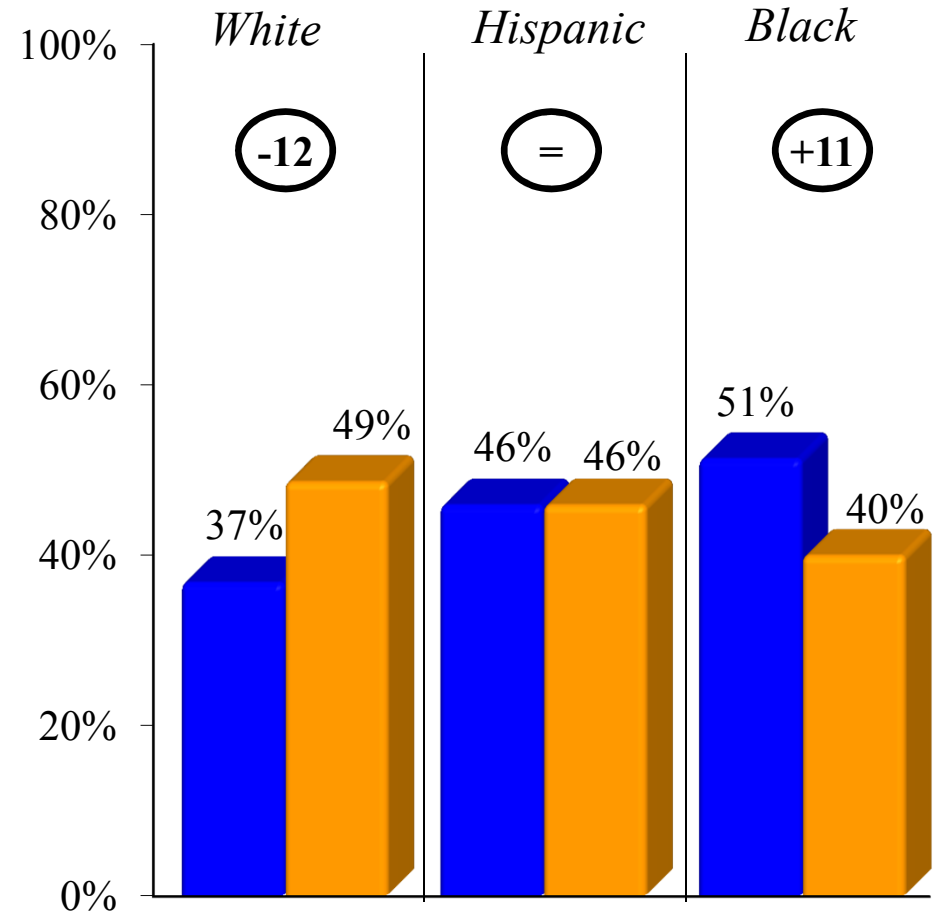
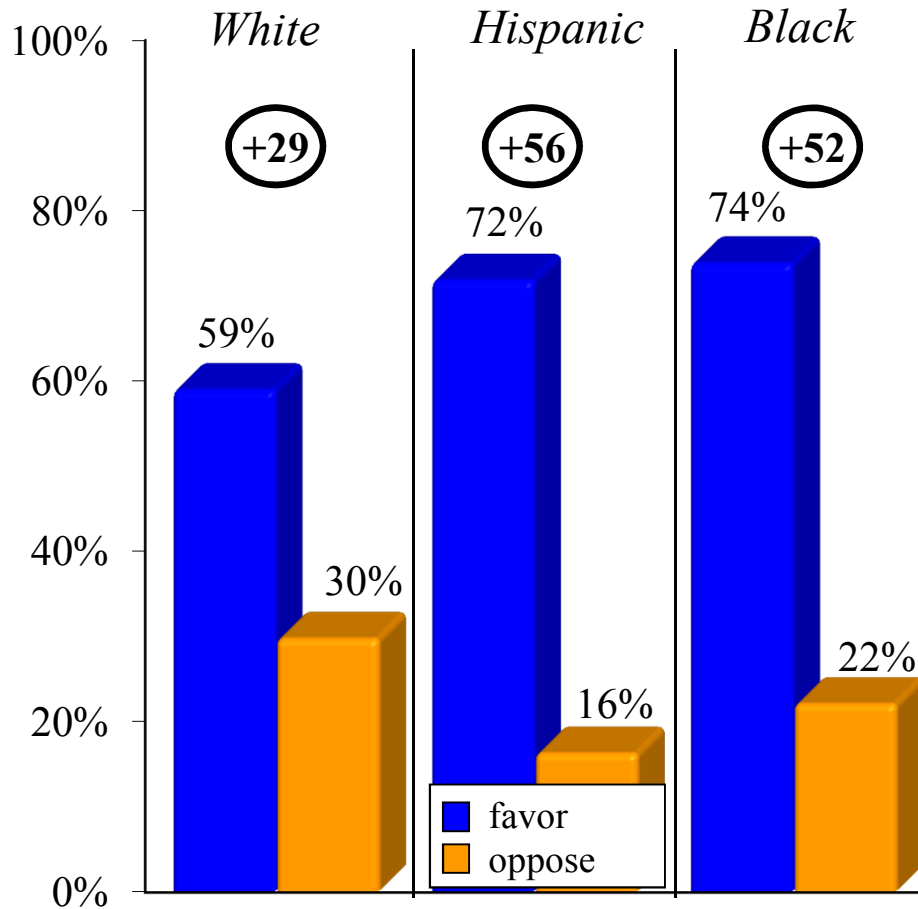
Support For A Coverage-Based Institute Is Much More Mixed Based On Race



CER Institute w/ Information by Race



CER Institute w/ Coverage Decisions by Race



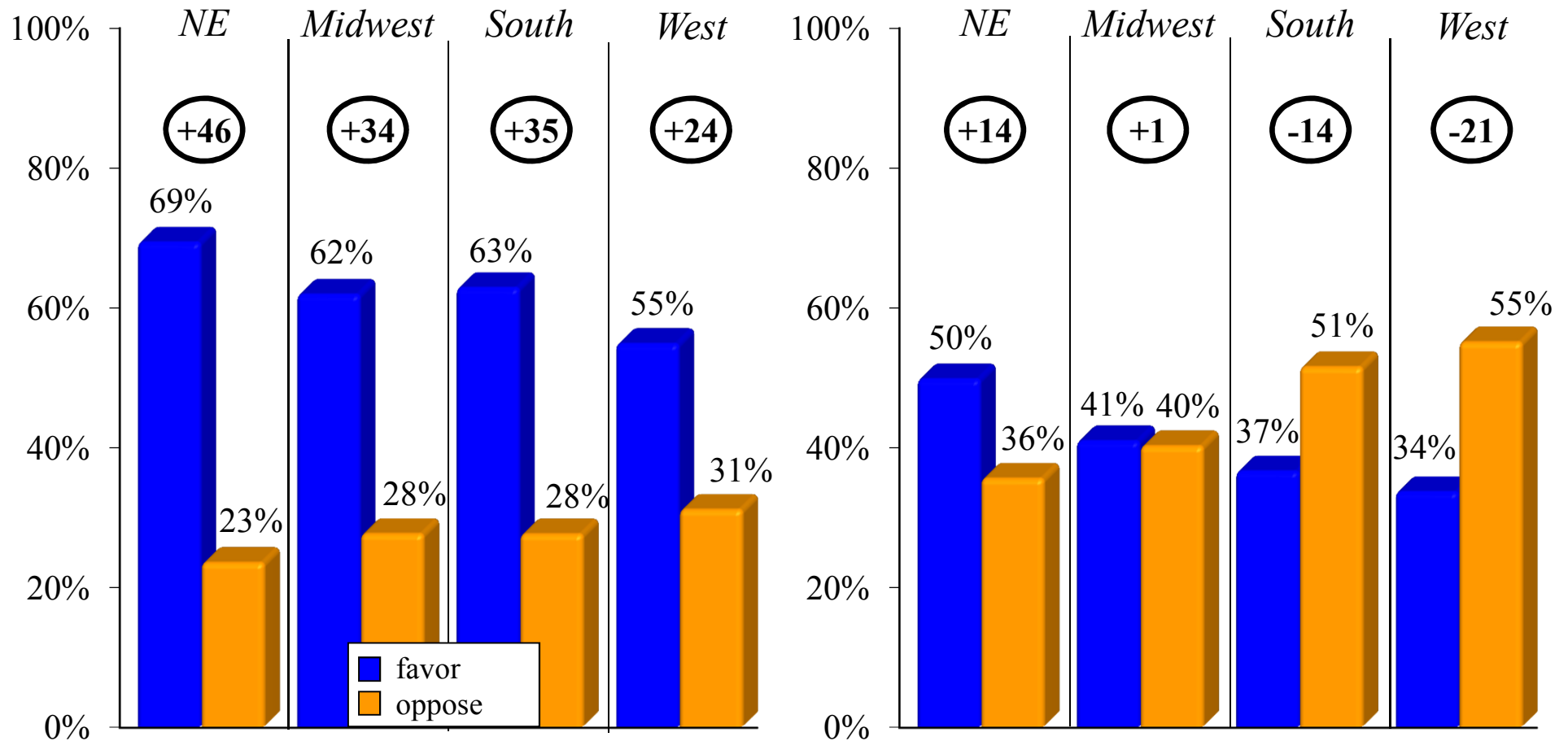
All Regions Of The Country Favor An Information-Based CER Institute



*CER Institute w/ Information
by Region*



*CER Institute w/ Coverage Decisions
by Region*



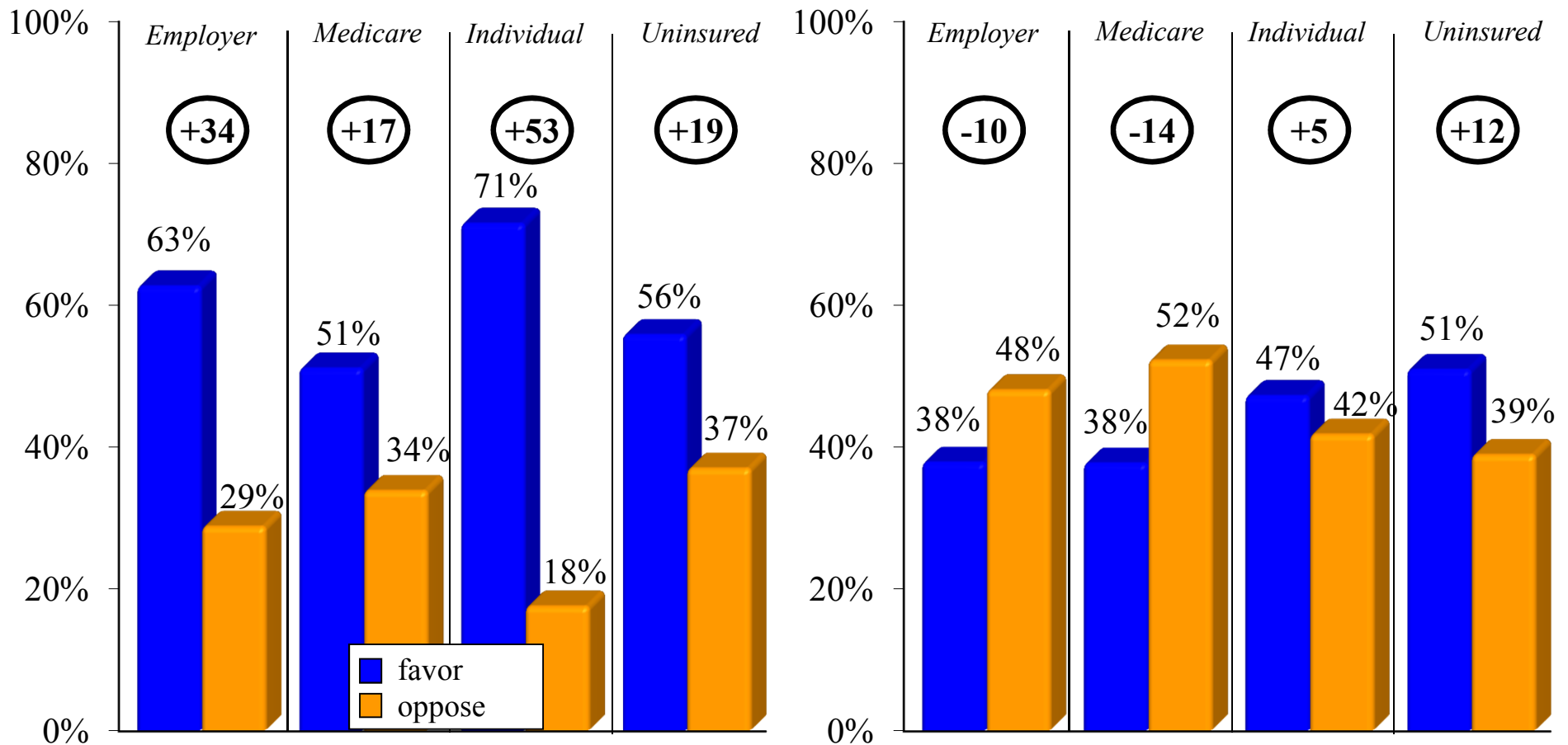
Regardless Of Coverage Type, Voters Support An Information-Based Institute



CER Institute w/ Information by Coverage



CER Institute w/ Coverage Decisions by Coverage

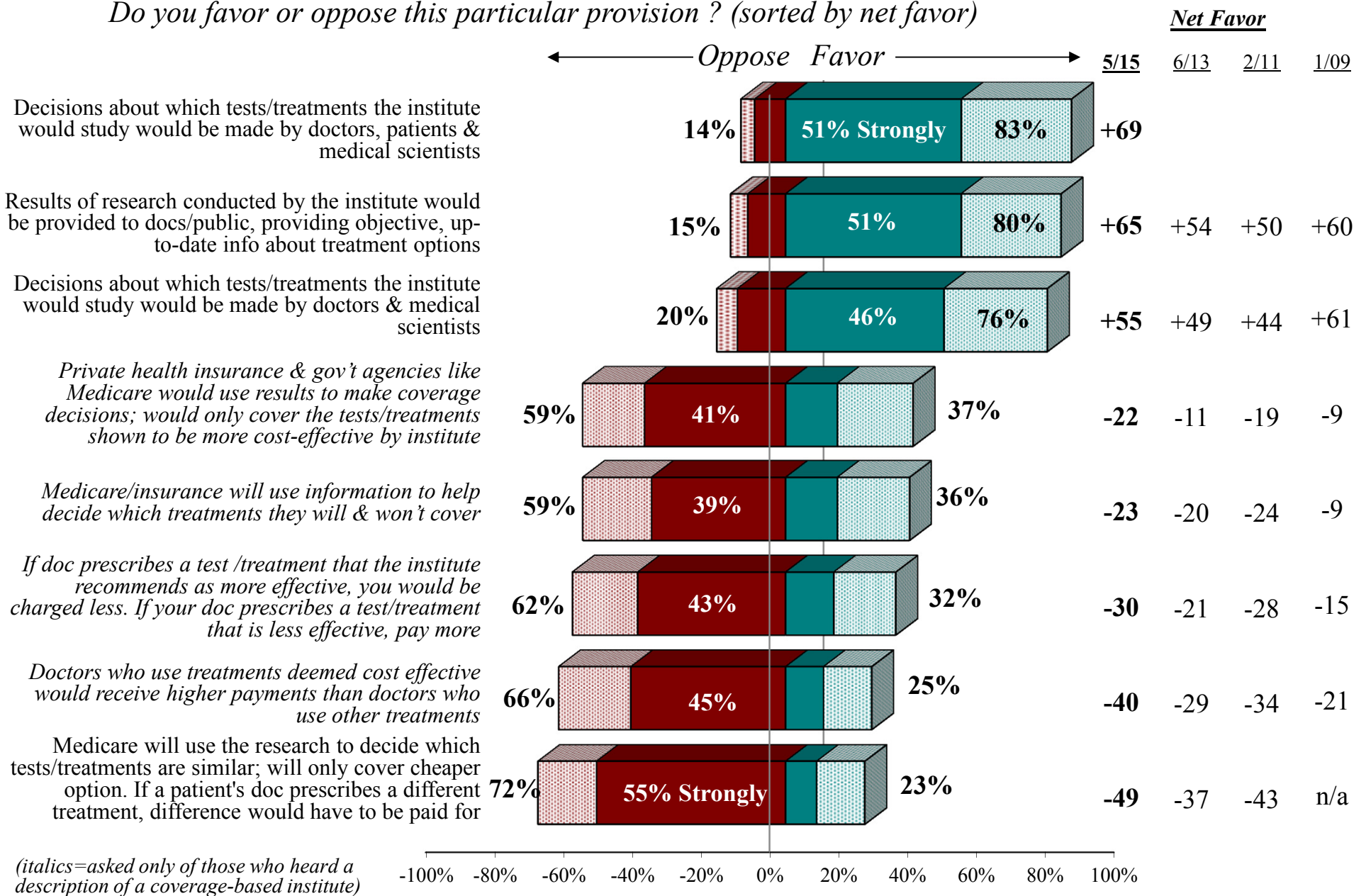


A photograph of a scientist with long blonde hair, wearing a white lab coat, looking through the eyepiece of a white microscope. The microscope is on a desk, and a computer monitor is visible to the right. The background is a plain wall. A white text box with a blue border is overlaid on the center of the image.

**Voters Favor Providing Information,
But Oppose Approaches That Would
Affect Coverage Decisions**

Voters Favor Provisions For Providing Information, But Oppose Incentivizing Or Making Coverage Decisions

Do you favor or oppose this particular provision ? (sorted by net favor)

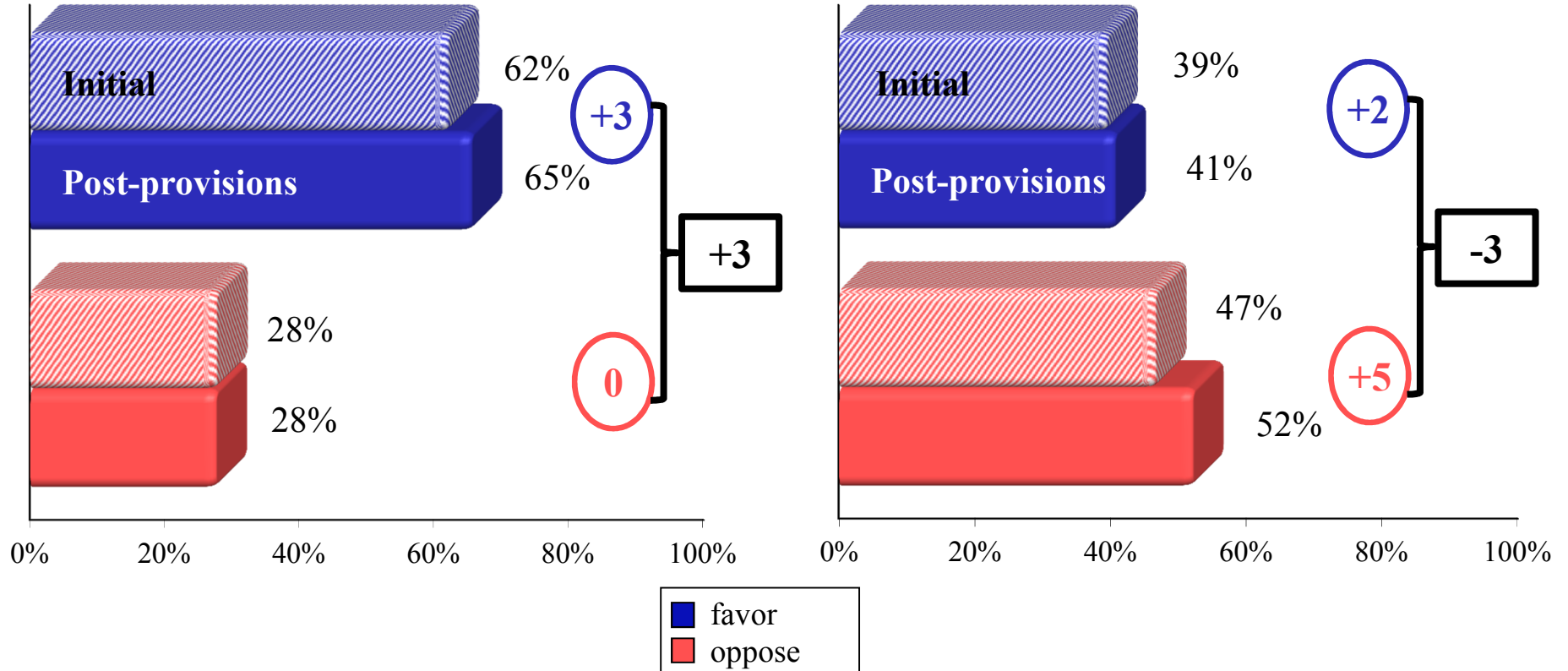


(italics=asked only of those who heard a description of a coverage-based institute)

As Voters Learn More, They Grow More Supportive Of An Information-Based Institute & Less Supportive Of A Coverage-Based One

CER Institute w/ Information

CER Institute w/ Coverage Decisions





**Voters Have Major Concerns About
Government Meddling And Denial Of
Coverage Issues**



Voters Told About An Institute Providing Information, Nonetheless Worried That Data Would Affect Coverage Decisions

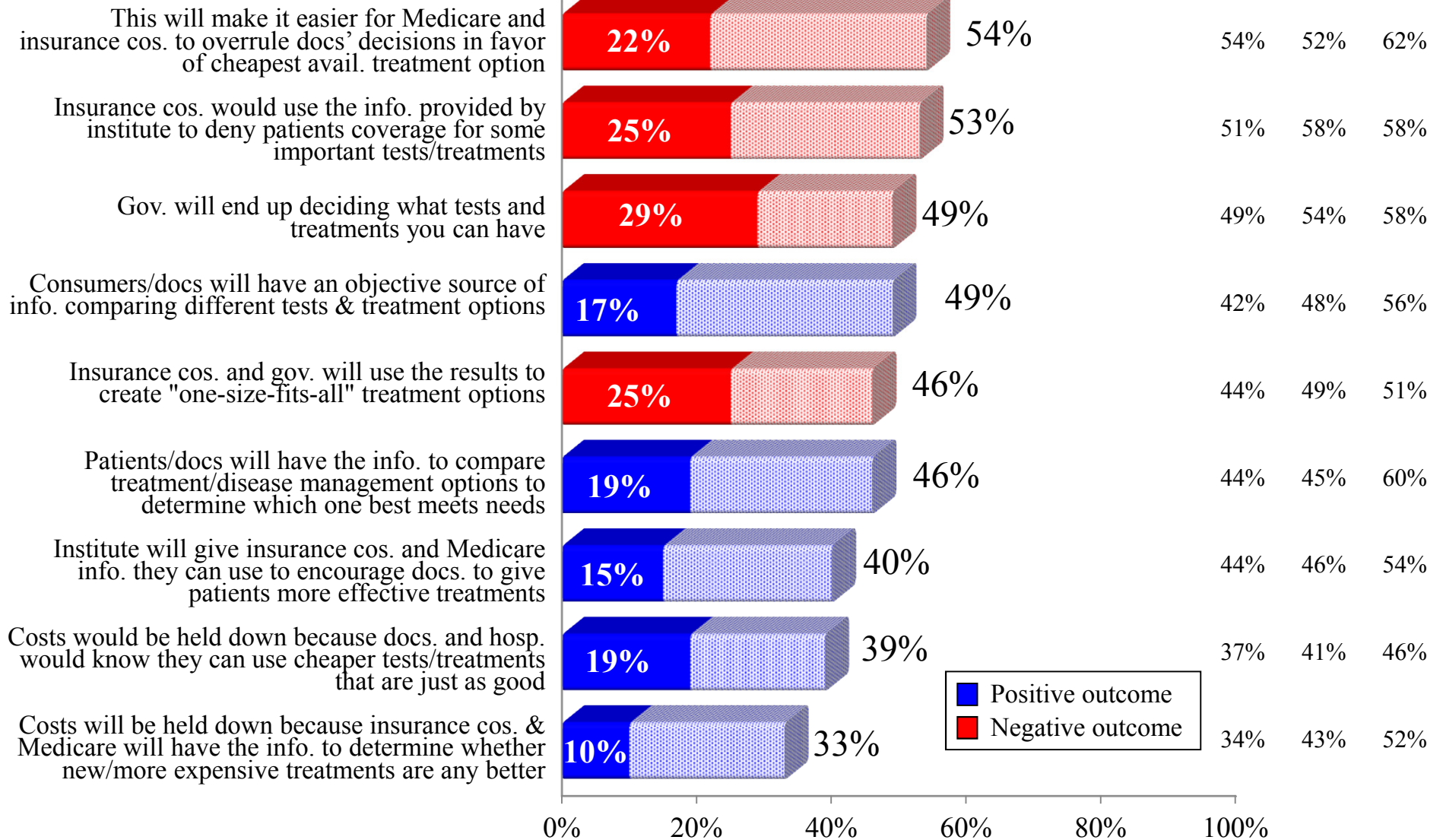
Expectations Of All Outcomes Declined

*%Almost Certain
+ %Very Likely*

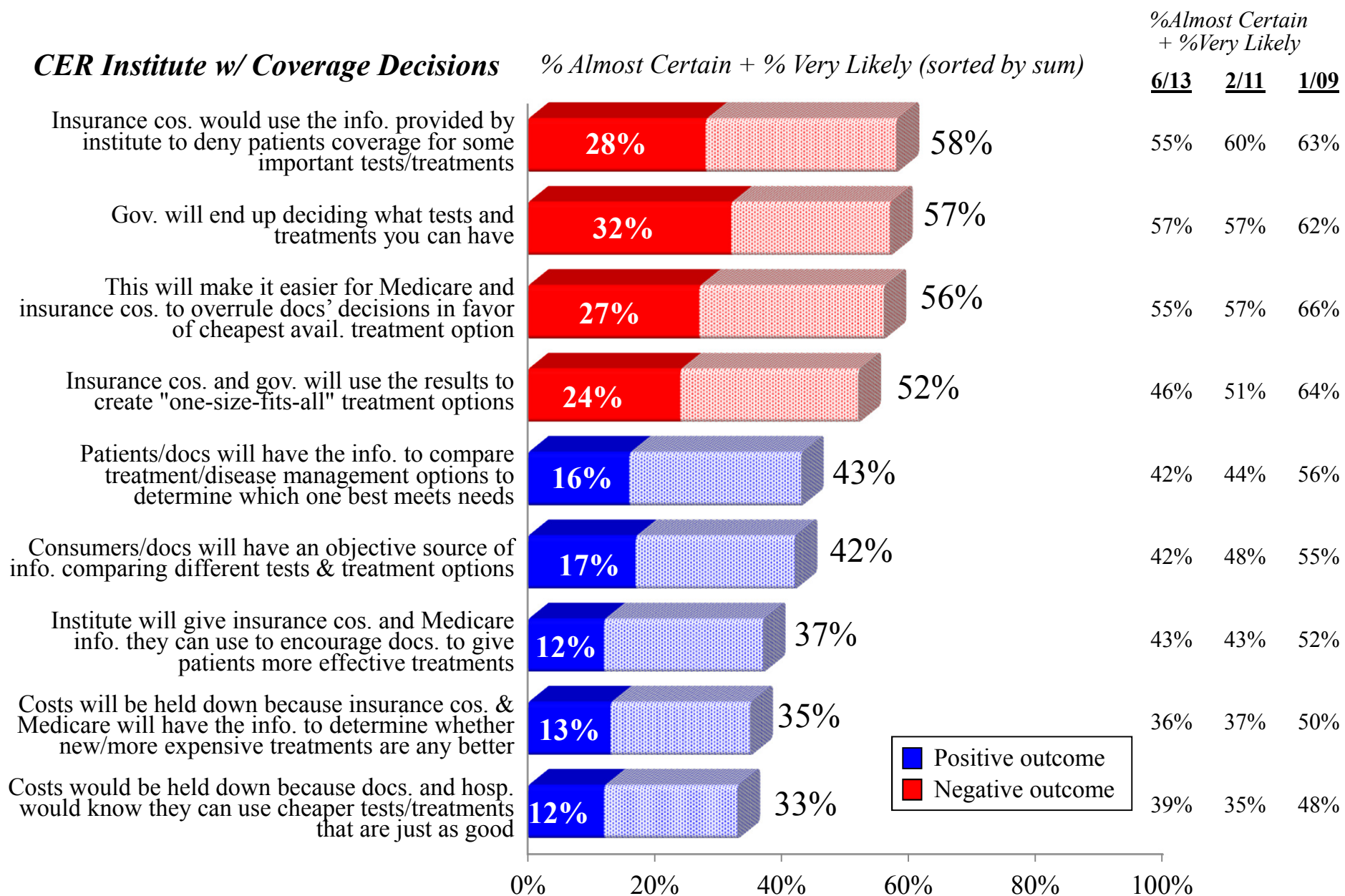
6/13 2/11 1/09

CER Institute w/ Information

% Almost Certain + % Very Likely (sorted by sum)



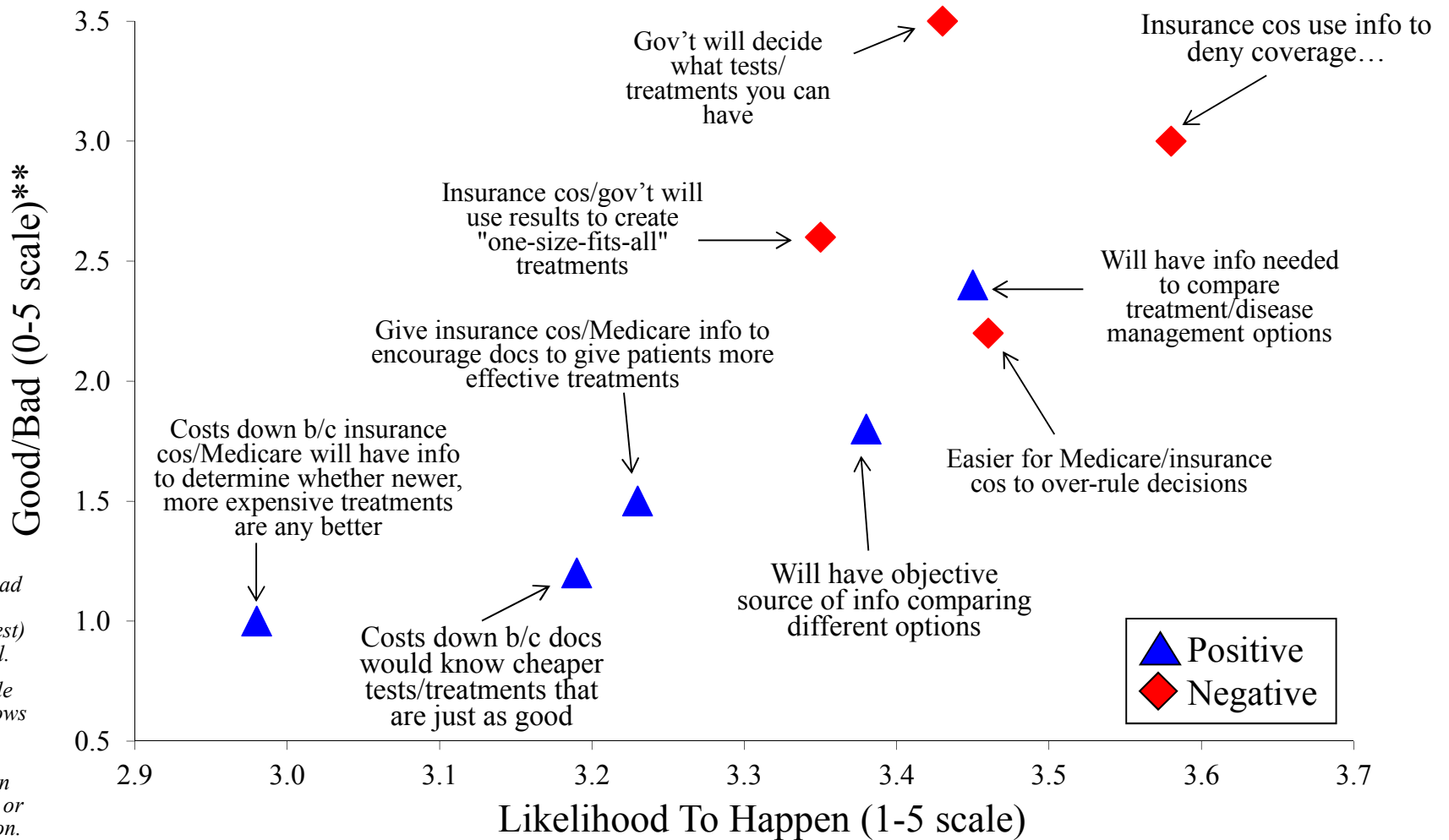
Voters Who Heard About An Institute Involved In Coverage Were Even More Likely To Expect Negative Outcomes



Those Told About An Information-Focused Institute Saw A Mix Of Outcomes, But Expressed Particular Concern About Denial Of Coverage

How likely/[good/bad] is this, as a result of the government establishing an institute for comparative effectiveness research?

(among those who heard description w/o coverage decisions)

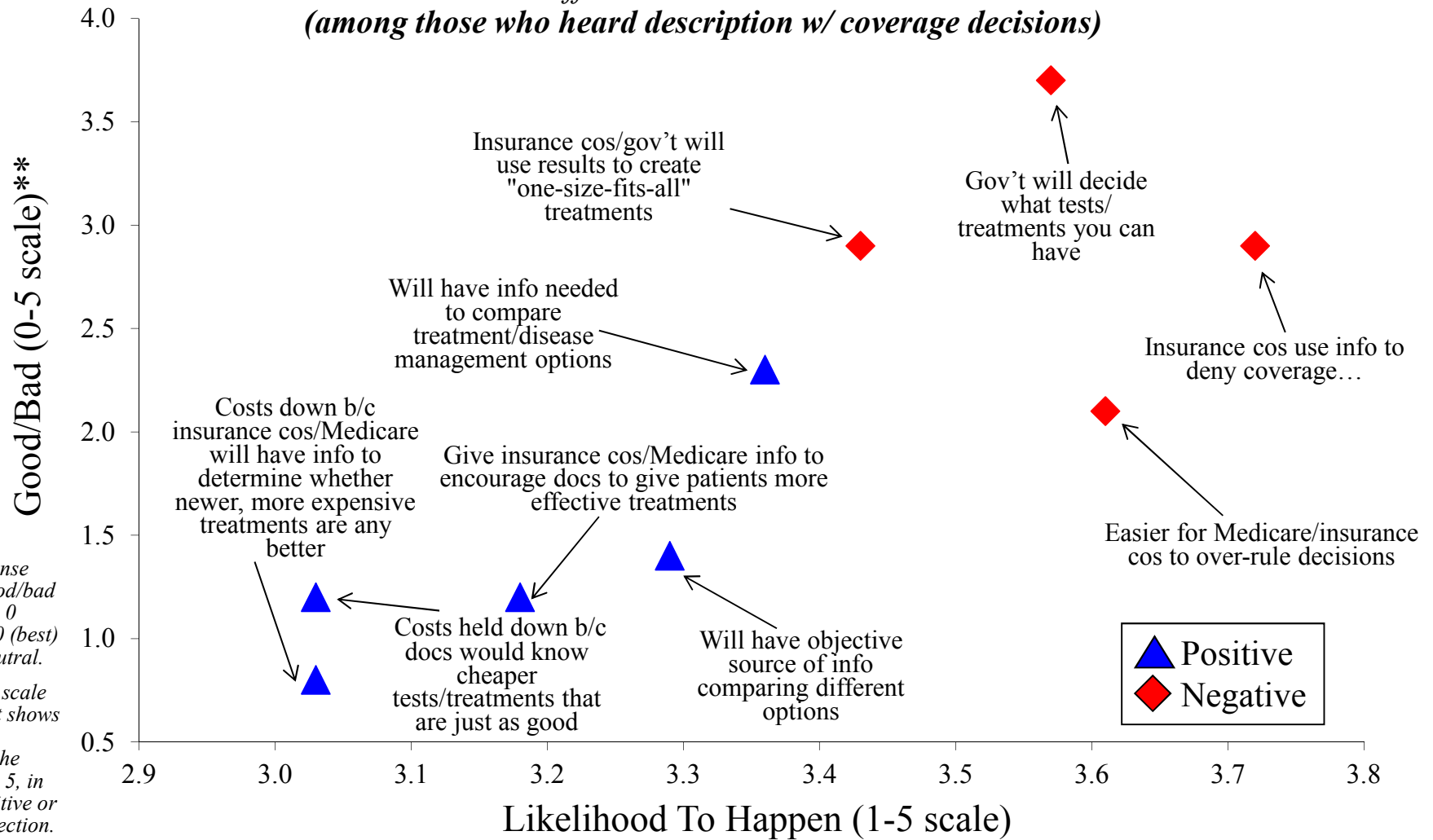


***The response scale for good/bad ranged from 0 (worst) to 10 (best) with 5 as neutral. The vertical scale on this chart shows the average distance of the ratings from 5, in either a positive or negative direction.*

Those Told About An Institute Involved With Coverage- Decisions Saw A More Clearly Negative Picture, Dominated By Fears Of Government Meddling And Denial Of Coverage

How likely/[good/bad] is this, as a result of the government establishing an institute for comparative effectiveness research?

(among those who heard description w/ coverage decisions)



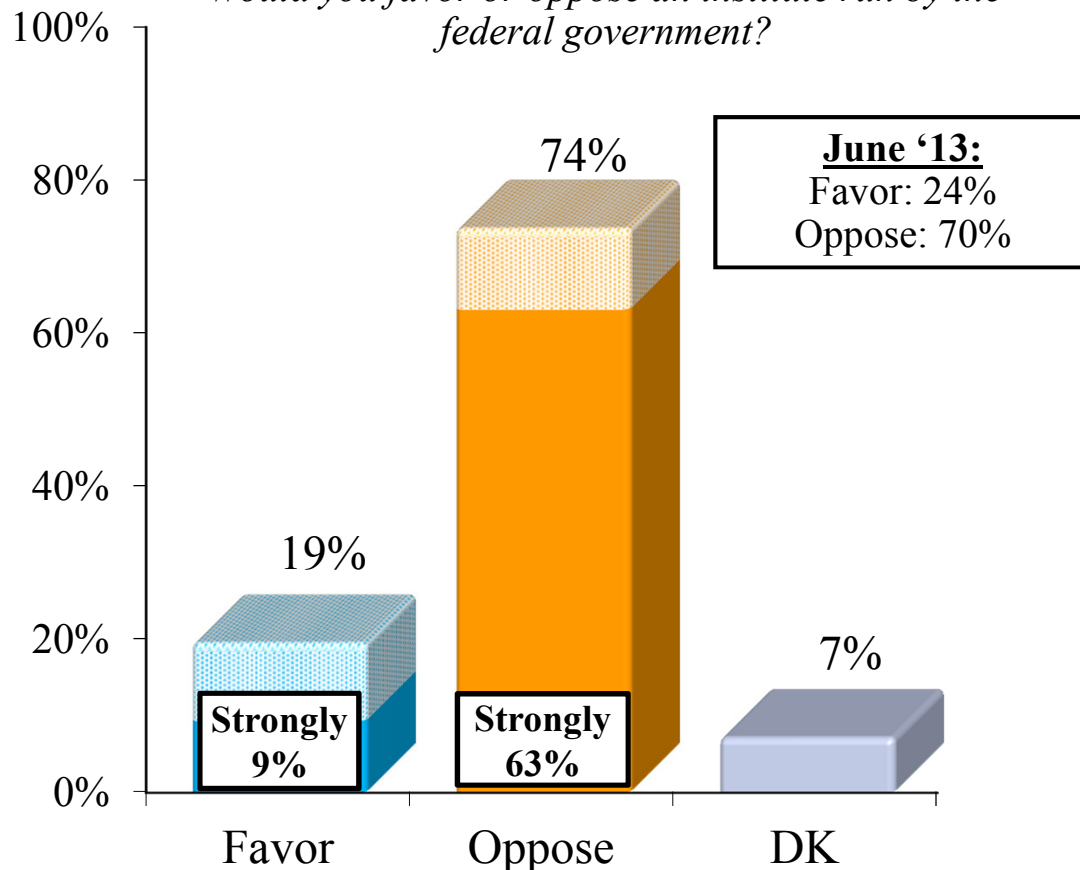
***The response scale for good/bad ranged from 0 (worst) to 10 (best) with 5 as neutral. The vertical scale on this chart shows the average distance of the ratings from 5, in either a positive or negative direction.*



**Voters Strongly Oppose A CER Institute
Involved In Coverage Decisions Or Run
By The Federal Government**

Voters Strongly Oppose A CER Institute Run By The Federal Government

Some have suggested that the institute for comparative effectiveness research be run by the federal government instead of by an independent board. Would you favor or oppose an institute run by the federal government?



By Key Group		
	Favor	Oppose
Democrat	25%	66%
Independent	18%	73%
Republican	14%	83%
18-29	28%	64%
30-39	19%	72%
40-49	17%	75%
50-59	14%	81%
60+	20%	74%
White	17%	77%
Hispanic	28%	62%
Black	25%	63%
Northeast	26%	65%
Midwest	18%	76%
South	18%	74%
West	18%	77%
Employer HC	17%	77%
Medicare	20%	74%
Medicaid	32%	58%
Individual HC	20%	71%
Uninsured	23%	69%

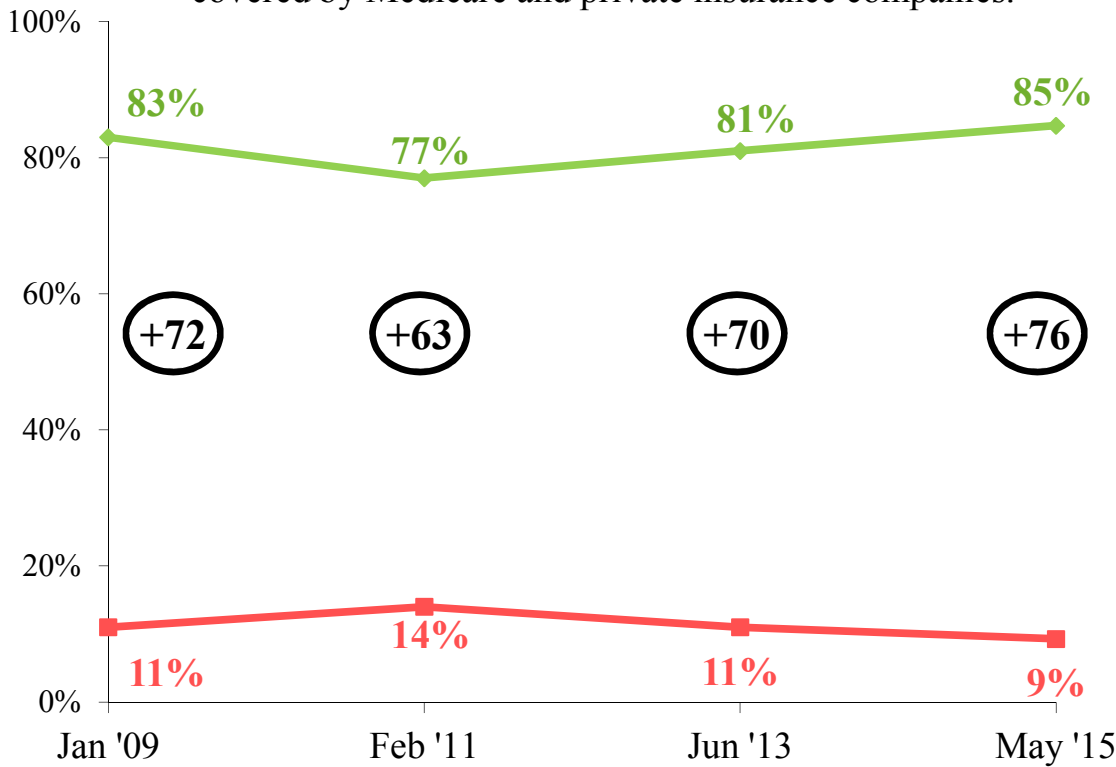
(darker shading=stronger intensity)



Voters Overwhelmingly Prefer A CER Institute That Provides Information Over One That Makes Coverage Decisions

Which kind of comparative effectiveness research institute would you prefer?

- Statement A:** One that conducts research and provides information to doctors and the public, so health care and treatment decisions will be informed by the best available evidence.
- Statement B:** One that conducts research and decides which new tests and treatments should or should not be covered by Medicare and private insurance companies.



By Key Group		
	Statement A	Statement B
Democrat	85%	10%
Independent	84%	9%
Republican	87%	9%
18-29	88%	10%
30-39	85%	12%
40-49	86%	9%
50-59	84%	8%
60+	82%	8%
White	85%	9%
Hispanic	83%	14%
Black	88%	7%
Northeast	85%	11%
Midwest	86%	8%
South	83%	10%
West	86%	9%
Employer HC	84%	11%
Medicare	83%	9%
Medicaid	85%	9%
Individual HC	85%	11%
Uninsured	94%	4%



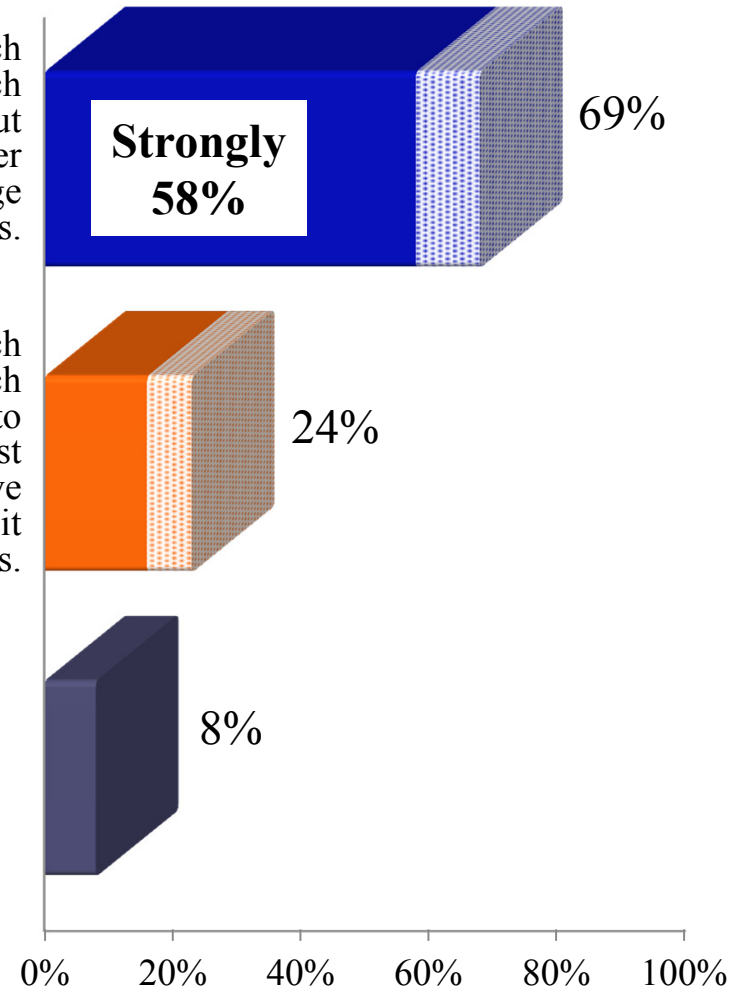
Even After Hearing Arguments On Both Sides, Voters Overwhelmingly Agree That Comparative Effectiveness Research Should Not Be Used To Intervene Or Deny Coverage

Now I'm going to read two statements and ask which comes closer to your point of view:

Statement A. It's very important to have an institute that conducts research on which tests and treatments are most effective. However, that research should only be used to give doctors and patients more information about which options are right for each individual patient. The research should never be used by the government or insurance companies in order to deny coverage or intervene in decisions that should be left between patients and their doctors.

Statement B. It's very important to have an institute that conducts research on which tests and treatments are most effective. But in order for that research to make a big difference in our health care system, it needs to be available to Medicare, Medicaid, and health insurers so that they can make the best decisions about how to provide affordable coverage. Otherwise, ineffective tests and treatments will waste more and more money—and we'll all pay for it in the form of higher health insurance premiums and higher taxes.

Don't Know



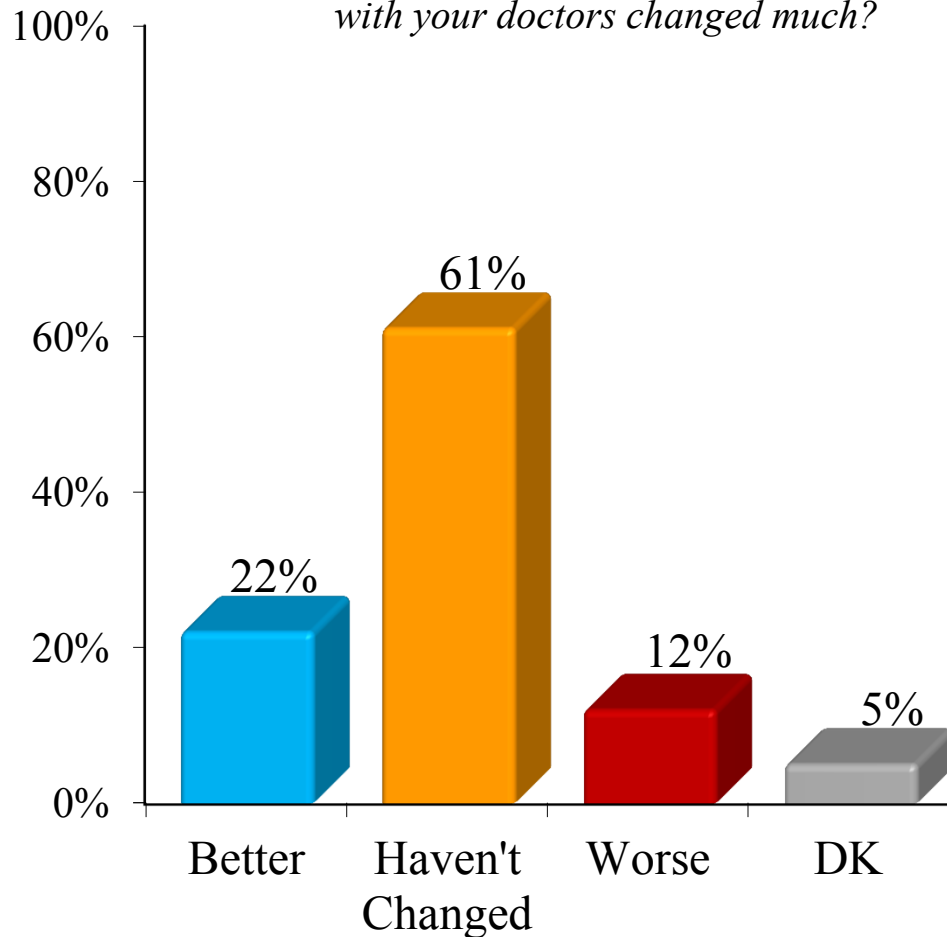


Voters Want More Information Regarding Cost (Particularly For Them) And Options, But Want To Make Decisions Themselves

A Majority Find That Their Recent Interactions With Their Doctor Haven't Changed Much

More See Improvement Than Worsening

Do you find that your recent discussions and interactions with your primary care physician are better than they were in the past, worse than they were in the past or haven't your discussions and interactions with your doctors changed much?

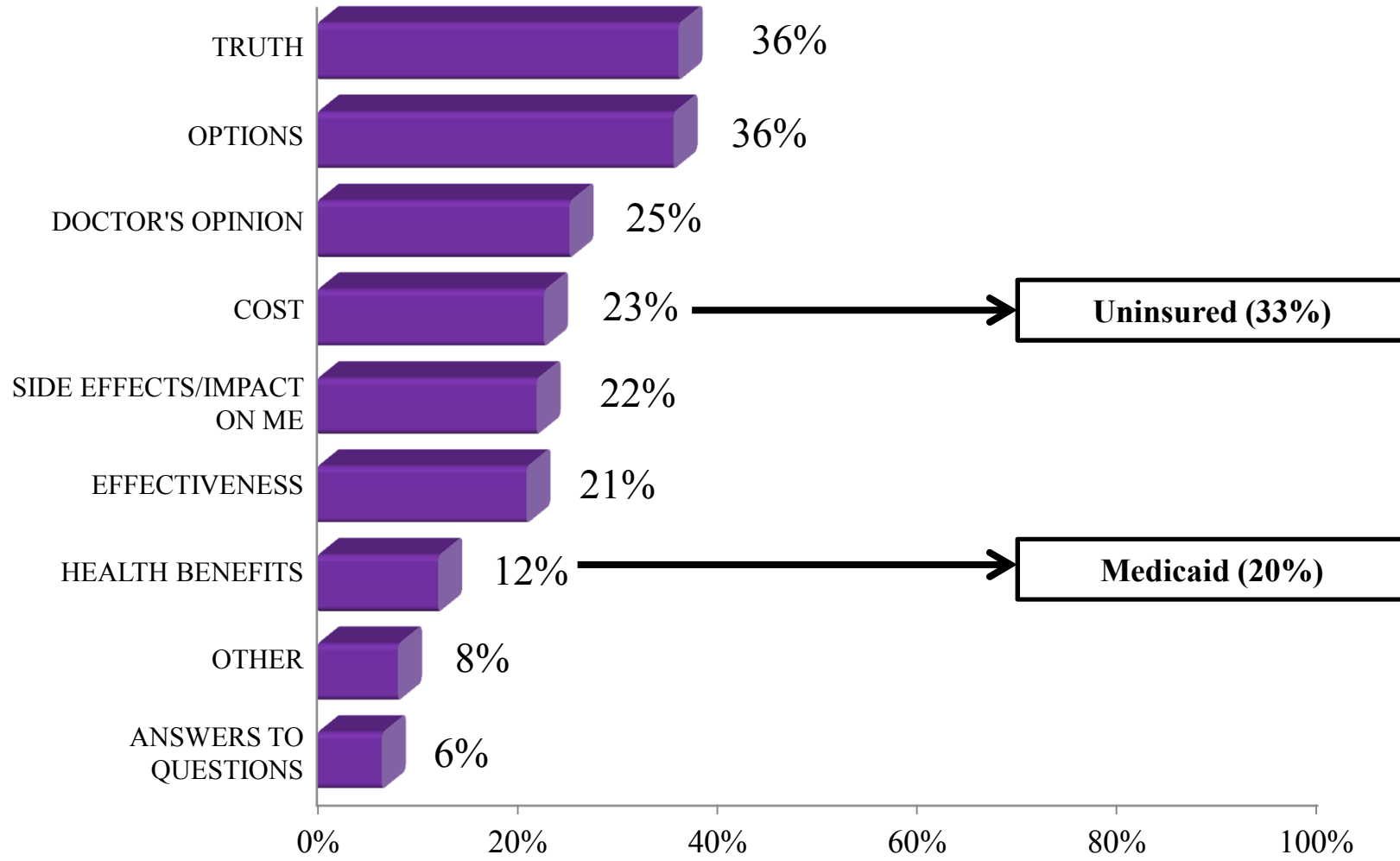


By Key Group			
	Better	No Change	Worse
Democrat	24%	61%	9%
Independent	20%	61%	12%
Republican	21%	60%	16%
18-29	19%	67%	7%
30-39	21%	67%	9%
40-49	15%	65%	14%
50-59	24%	56%	15%
60+	27%	55%	14%
White	22%	62%	13%
Hispanic	21%	59%	12%
Black	24%	55%	10%
Northeast	25%	62%	10%
Midwest	25%	57%	12%
South	18%	60%	14%
West	22%	64%	11%
Employer HC	19%	64%	13%
Medicare	30%	53%	12%
Medicaid	25%	54%	15%
Individual HC	22%	66%	9%
Uninsured	14%	45%	11%



Voters Listed The "Truth" & Options As The Two Most Important Questions They Want Their Doctor To Answer

If you are discussing treatment options with your doctor, what questions about those treatment options do you want your doctor to answer?

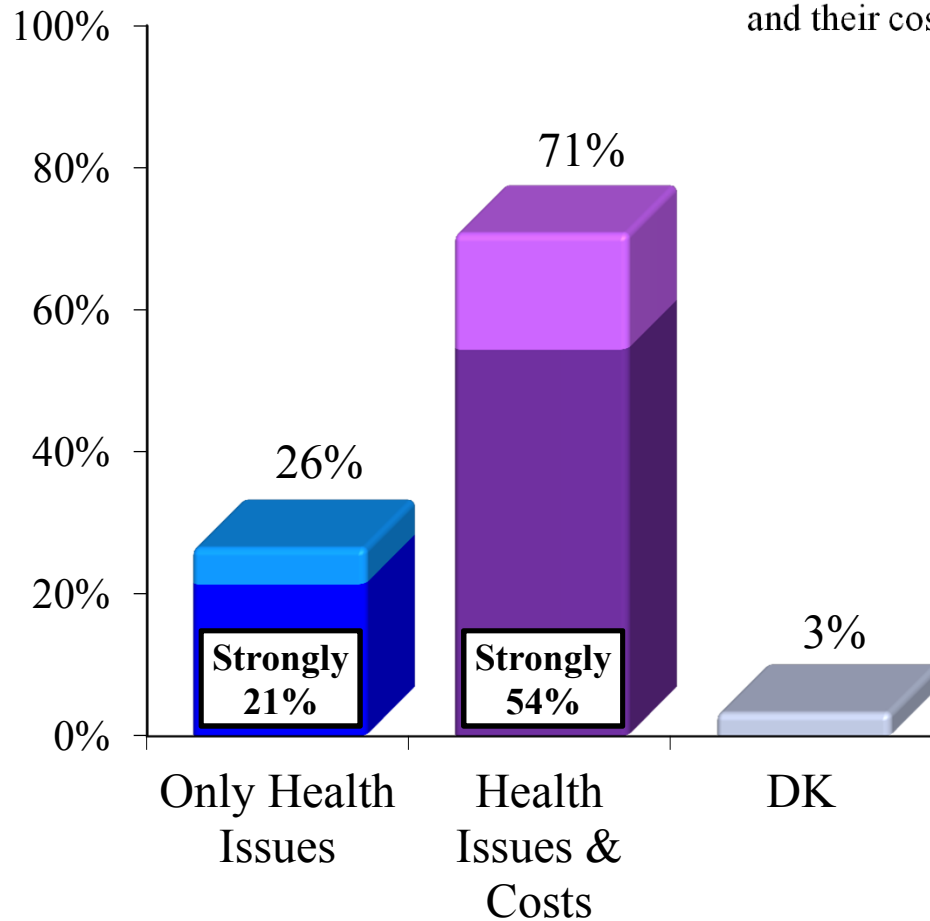


Voters Overwhelmingly Want Their Doctors To Discuss The Cost Of Treatment As Well As The Health Issues Involved

Which do you prefer:

● That your doctor only gives you information about the health issues related to treatment options

● That your doctor gives you both information about both the health issues related to treatment options and their costs



By Key Group		
	Only Hlth Issues	Hlth Issues & Costs
Democrat	25%	71%
Independent	27%	70%
Republican	28%	70%
18-29	22%	77%
30-39	28%	70%
40-49	27%	71%
50-59	28%	68%
60+	27%	68%
White	27%	71%
Hispanic	23%	74%
Black	23%	70%
Northeast	27%	71%
Midwest	28%	68%
South	23%	73%
West	29%	69%
Employer HC	25%	72%
Medicare	30%	66%
Medicaid	38%	57%
Individual HC	21%	78%
Uninsured	25%	72%

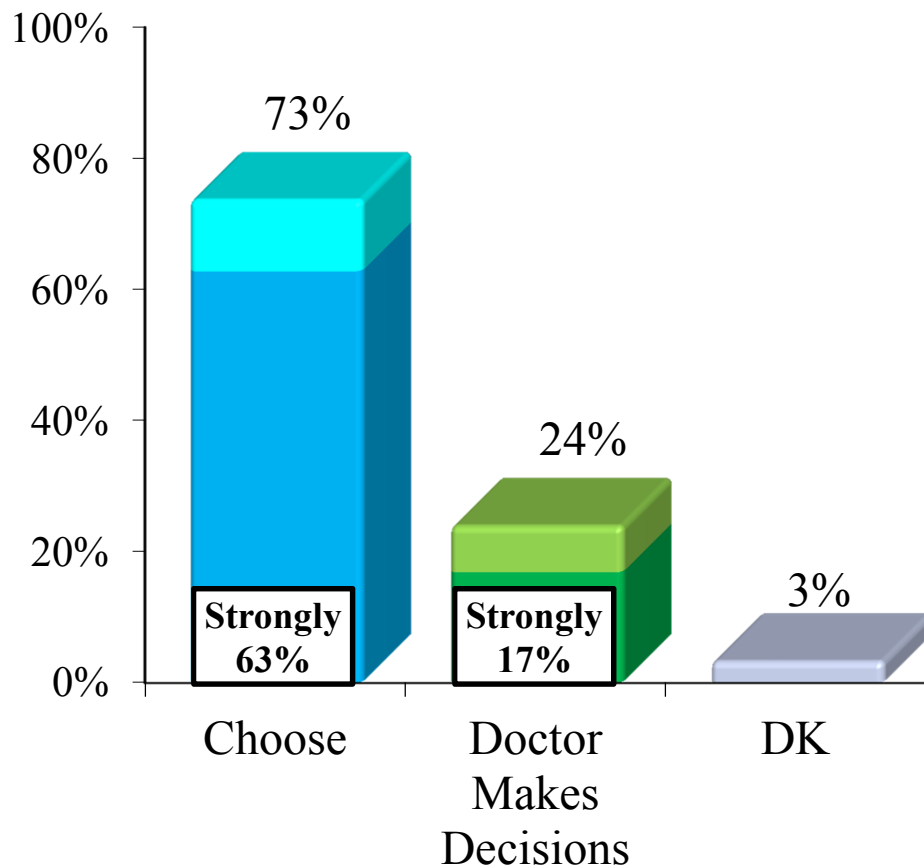


Three Quarters Want To Choose Treatments For Themselves Rather Than Leaving The Decision To Their Physician

Which comes closer to your point of view:

● I want to have the ability to choose which of the available treatment options is best for me.

● I trust the doctor to make treatment decisions for me



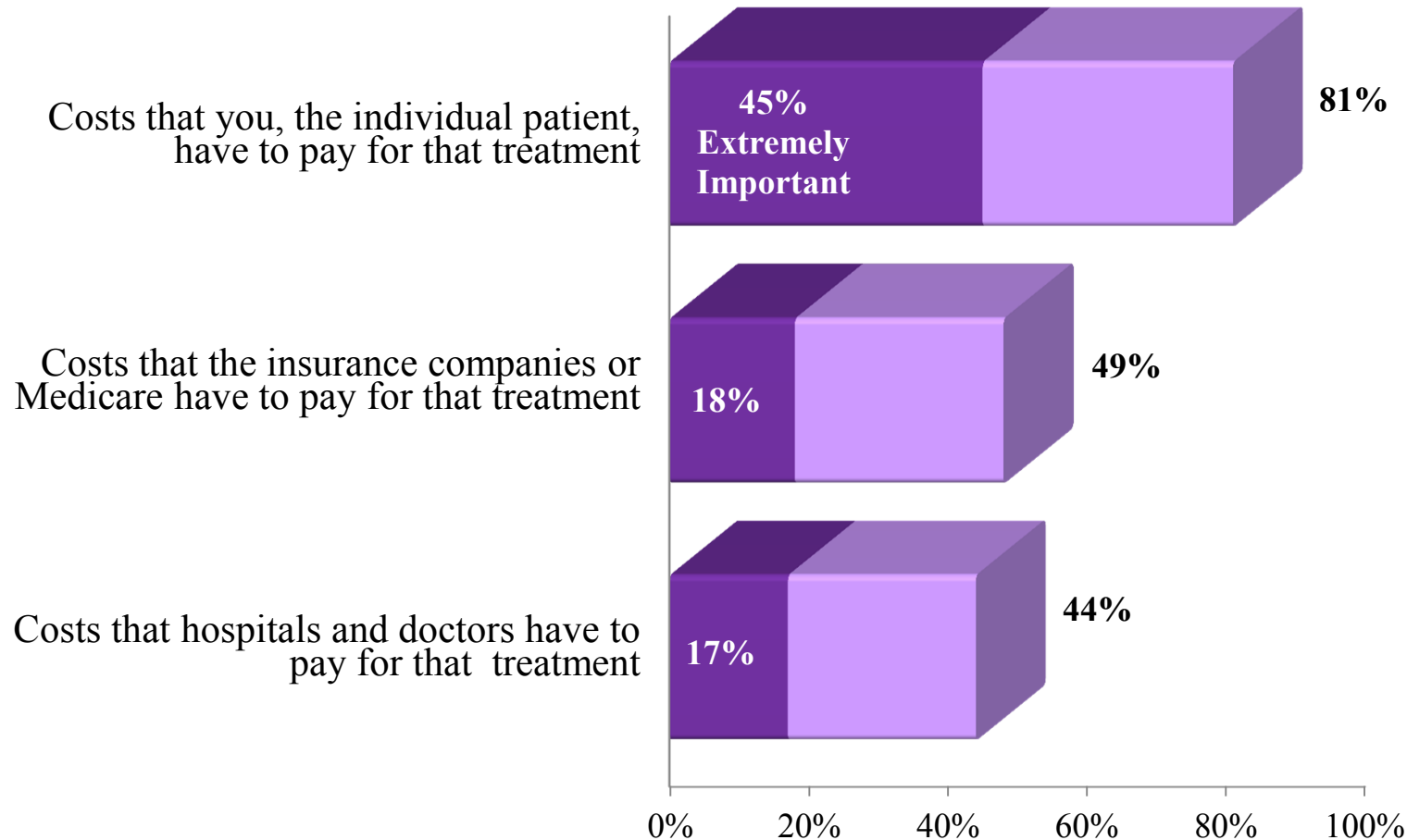
By Key Group		
	Choose	Doctor Makes Decisions
Democrat	75%	23%
Independent	74%	24%
Republican	71%	26%
18-29	74%	24%
30-39	76%	22%
40-49	79%	17%
50-59	75%	23%
60+	68%	29%
White	73%	24%
Hispanic	75%	21%
Black	75%	22%
Northeast	75%	22%
Midwest	73%	25%
South	73%	23%
West	73%	25%
Employer HC	76%	21%
Medicare	68%	30%
Medicaid	68%	27%
Individual HC	74%	23%
Uninsured	77%	22%



Voters Care Deeply About The Cost To Them, & Far Less About The Cost To Others In The Healthcare System

When discussing the cost of various treatments with your doctor, how important is it for you to get each of the following types of information?

% Extremely Important + % Very Important (sorted by sum)



Strategic Conclusions

- **Americans value Comparative Effectiveness Research that helps them and their doctor make treatment decisions collaboratively**
- **There continues to be a strong objection to using Comparative Effectiveness Research to make or even incentivize coverage decisions, even to hold down health care costs**
 - They do not want government interfering
 - They do not want insurance companies having an excuse to deny coverage
 - They doubt there would be cost savings
- **While voters want cost information and want it taken into account by doctors, the efficacy of the treatment and its impact on the patient is a higher priority for most**
- **The cost of treatments to hospitals or insurance companies is important to far fewer**
- **Voters do not want to cede control of their health care choices**





THE
MELLMAN
Group

RESEARCH
BASED
STRATEGY



NORTH STAR
OPINION RESEARCH