

The State of Health Care in the United States

Public Opinion Survey Report
November 30, 2017

Introduction

The health care system in the United States is vast and complex, making up nearly 20 percent of the economy and consisting of a variety of public and private payors and providers. Data suggests the U.S. pays more per capita for health care than other industrialized nations and yet ranks lower on several key health measures, including life expectancy.¹

At the same time, the U.S. is experiencing historically high levels of insurance coverage while continuing to serve as an engine for medical innovation that benefits not only the domestic market but the rest of the world.

To gain a better understanding of what Americans experience in the current health care system and what they want to see in the future, CVS Health® and Morning Consult conducted a public opinion poll during October 2017 among a national sample of 2,201 adults.

Americans feel negatively about the U.S. health care system and want change

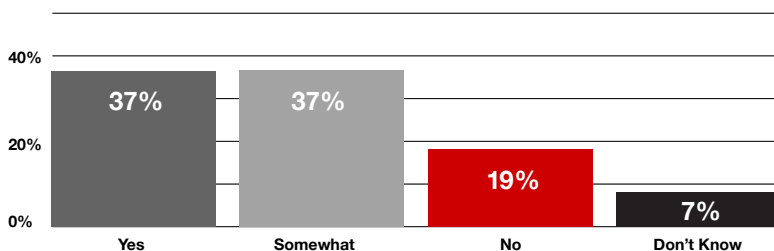
According to survey findings, majorities of Americans describe their attitudes towards the country's health care system as sad (58 percent), pessimistic (53 percent) and angry (52 percent). Whereas respondents associate positive feelings about the health care system at much lower rates. Approximately two in five Americans (39 percent) say the health care system makes them feel optimistic, and just over a quarter (26 percent) say the health care system makes them feel proud.

Approximately one third of Americans (37 percent) believe that the health care system works well for them, with a majority (56 percent) saying that it works only somewhat well or not at all well for them. Of those respondents who feel the health care system does not work well, 65 percent say it is too expensive, pointing to the affordability of health care, health insurance and prescription drugs as the most serious and urgent concerns that need to be addressed.

Overwhelming majorities agree the system is in need of reform (73 percent) and is currently too politicized (69 percent).

Figure 1: Most Americans (56%) say the U.S. health care system only works somewhat well or not at all well for them

Does the health care system in the United States work well for you (i.e., can you access the care you need at a cost you can afford)?



¹Davis, Karen (June 16, 2014). "Mirror, Mirror on the Wall, 2014 Update: How the U.S. Health Care System Compares Internationally". The Commonwealth Fund.



65%

say health care system is too expensive



73%

agree the system is in need of reform



69%

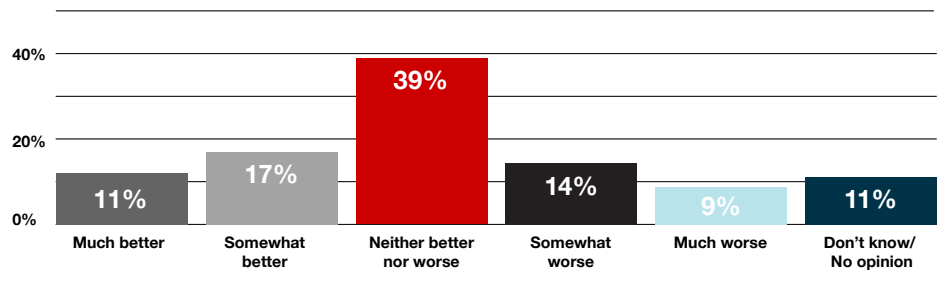
feels it is currently too politicized

Respondents generally believe health care is getting worse, but in their personal experiences health care has stayed about the same or has gotten better

More Americans (41 percent) believe health care in the U.S. has generally gotten worse rather than improved during the past five years. However, when it comes to personal experience, a plurality say their own health care has largely not changed. A larger share of Americans say it has gotten better (28 percent) than who say it has gotten worse (23 percent).

Figure 2: A plurality say the health care they personally receive has not changed, and are more inclined to think it has improved than gotten worse

And, compared to five years ago, would you say that the health care YOU directly receive now is...



People with insurance are largely happy with their coverage

Despite generally negative views of health care in the United States, a vast majority of insured respondents (83 percent) say they are somewhat or very satisfied with their coverage. However, some feel their choice is limited with nearly one third of respondents reporting that they did not have a choice in the health plan that was offered to them.

The uninsured population is less likely to use the health care system, with the exception of the E.R.

Americans with health insurance coverage are two to three times more likely to have seen a doctor or to have had surgery in the past year than uninsured Americans, and almost half of all uninsured respondents say they have not sought any of the most common forms of treatment over the same period. In contrast, insured and uninsured Americans report having used the emergency room at about the same rate.

Americans are cautiously optimistic about the future of health care

Respondents are hopeful about the health care system's future state, particularly for the next generation. This sentiment is particularly strong among American parents of whom 52 percent say they are optimistic their children will have better health care in the future. They point to innovation as the reason, with 65 percent stating advances in health care will make lives safer, and 66 percent stating advances will make lives longer.

Cost and quality remain a concern when thinking about the health care in the future. The ability for their children to access quality care in the future is a concern for 69 percent of parents. Less than one third of parents (31 percent) feel that health care will be more affordable for their children at their age than it is for them.



28%

of Americans say their health care has gotten better while 23% say it's gotten worse



Insured and uninsured Americans report having used the emergency room at about the same rate



52%

of American parents are optimistic their children will have better health care in the future



65%

say advances in health care will make lives safer and 66% say advances will make lives longer

Change and innovation are favored over stability, but Americans question if patients are prioritized

According to the survey, a plurality of Americans (45 percent) feel there is too much regulation in the way of innovation in health care, agreeing that it is more important to develop innovative new health care solutions than to make health care predictable and stable. Just over one third of respondents (35 percent) take a different perspective, saying that health care is not perfect, but it works, and that it is more important to keep the system predictable and stable than to experiment with it.

When it comes to how decisions are made in health care, three out of five Americans say the bottom line is prioritized ahead of patients. In contrast, only one in five say that either decisions are made by putting patients first or by considering them equally with the bottom line. Young adults aged 18-29 are nearly twice as likely as adults on average to say that decisions are made by putting patients first.

Building a better health care system

Public opinion underscores the widespread desire to evolve today's health care system into one that is affordable and sustainable for today's health care consumer and for generations of Americans to come. Fortunately, many stakeholders are working to address these opportunities by improving outcomes and driving down costs.

At CVS Health, we serve as the front door to health care – touching the lives of one in three Americans — and we are playing an active role in providing more affordable, accessible and effective care. Our integrated pharmacy model enables us to tackle some of the nation's biggest health care challenges – from escalating costs to rising rates of chronic disease.

We are not alone in this effort. Tremendous investments are being made in private-sector innovations and public-private partnerships to improve health care and contain costs. Health care industry leaders and policymakers are helping to increase choice and competition, empower consumers and make a complex system easier to navigate.

For more information on how CVS Health is working to improve health care, visit: www.cvshealth.com/thought-leadership.

Survey Methodology

This survey was conducted online within the United States from October 1 9-23, 2017 among 2,201 adults aged 18+ by Morning Consult on behalf of CVS Health and Forbes. Results from the survey have a margin of error of $\pm 2\%$.



45%

of Americans feel there is too much regulation in the way of innovation in health care
