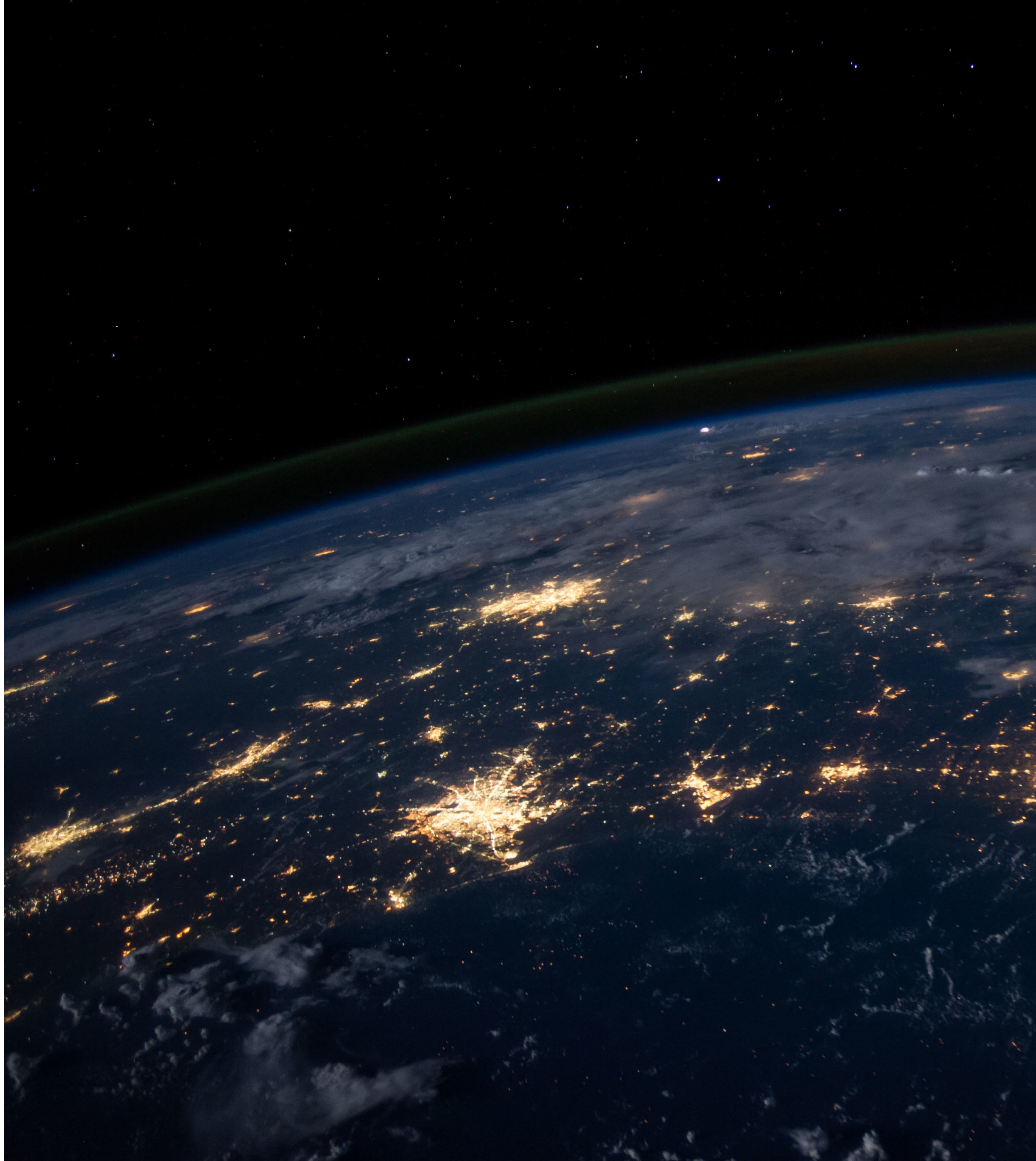
ECHELON INSIGHTS

Patients Rights Advocate

Transparency Survey

N=2,024 Voters in the Likely Electorate
August 23 - 27, 2024

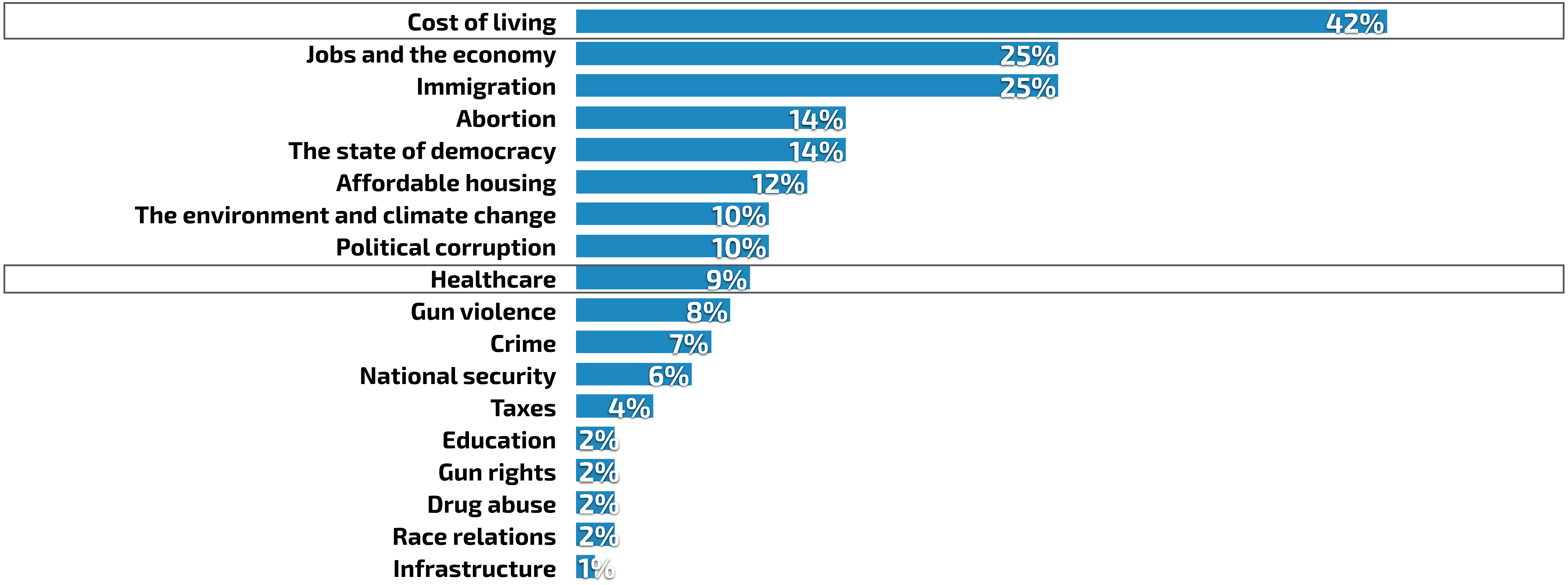


Key Findings

- **92% of the likely electorate support the federal government requiring hospitals and health insurance companies to provide real prices to patients before they receive care.**
  - This transparency requirement includes **71% strong support.**
  - **This is a bipartisan issue** with 91% of Republicans, 92% of Independents, and 94% of Democrats supporting.
- All of the messages for transparency performed well with net agreement of +78 points or more (86-91% completely or mostly agree).
  - **The best performing message was "Verify"** by a margin of 91-6 and 3% unsure.
  - The weakest message, relative to others, was "Up Front" by a margin of 86-8 and 6% unsure.
- However, these **messages did not improve support of transparency** and increased opposition by 1 point, from 4% to 5%.
- **The strongest message against transparency was the "Focus"** message with net agreement of +10 points (51-41). GOP respondents agreed at a rate of 59-33 with 8% unsure, compared to an even 47-47 with 7% unsure among Democrats.
  - **Voters disagreed with each of the other messages against transparency by rates of -4 to -25 points.**
- 77% of respondents say "I prefer a president who will demand transparency in healthcare prices and billing so consumers are protected from overcharging and benefit from lower costs through competition and choice." is closest to their view.
- **77% of respondents say medical debt is a major problem.** An additional 17% say it's a minor problem. Only 3% say it is not a problem.

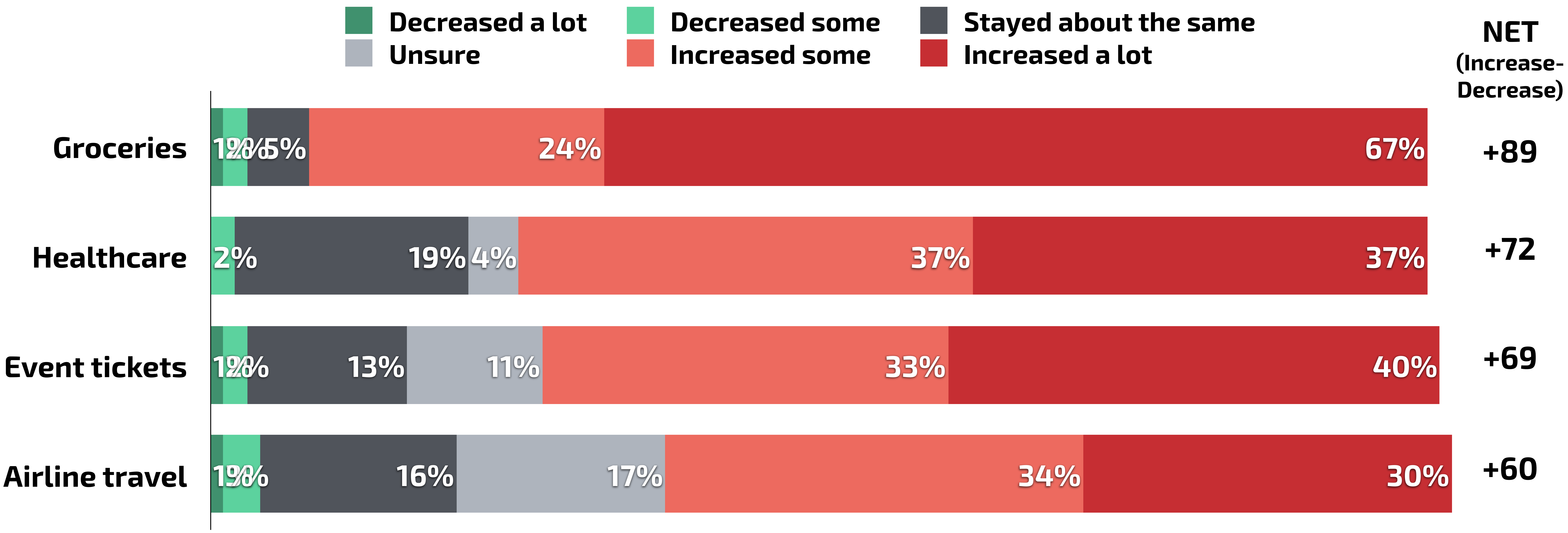
Key Concerns

Cost of living is a top two issue for more than 2 in 5 voters; healthcare is seen as a smaller issue in comparison



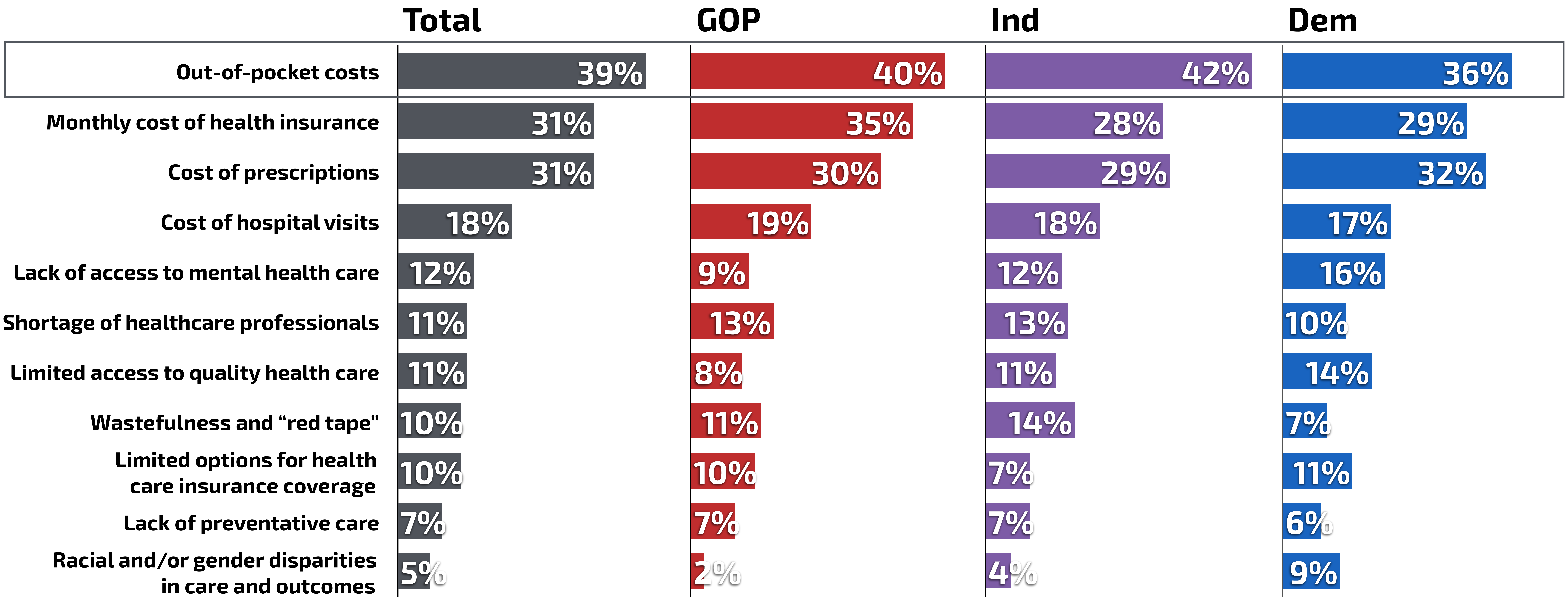
Q. If you had to choose just one, which would you say is the biggest issue facing the country today? AND Q. Which would you say is the second biggest issue facing the country today?
Note: Not showing "Something else" and "Unsure."

People see prices increasing in the past year across sectors, including 74% seeing some or a lot of increase in healthcare prices



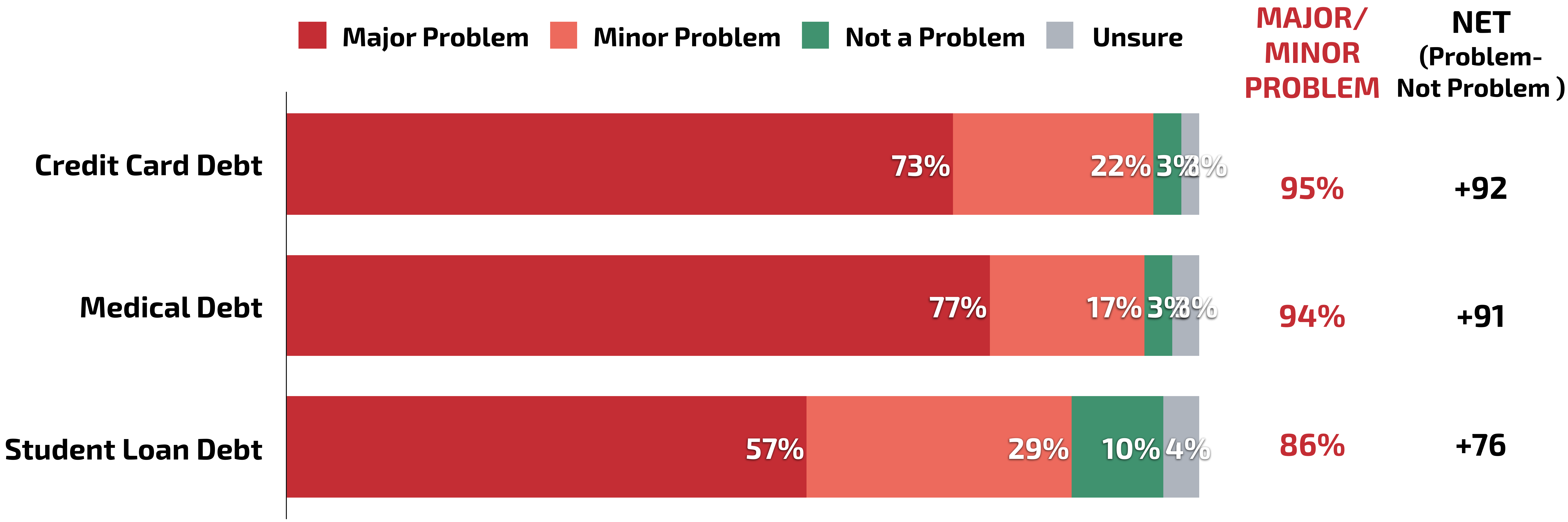
Q. Would you say that the following prices have increased or decreased in the past 12 months?
Note: Event tickets had examples listed: (e.g. concerts, movies, plays, sporting events).

Within the issue of healthcare, costs of all sorts are the key concerns across political parties



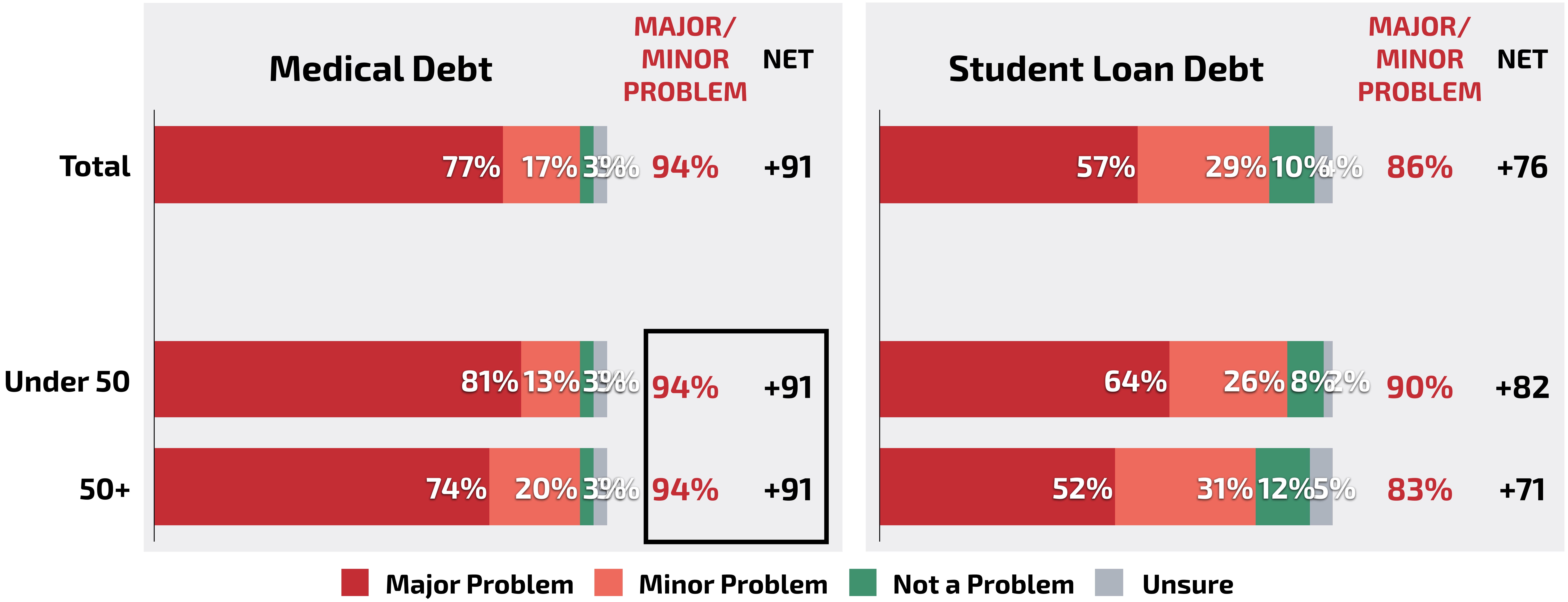
Q. When it comes to the issue of healthcare, what do you think are the biggest issues facing the country today? You may select up to two
Note: Not showing “Unsure”, “Something Else” or “Not using more homeopathics, vitamins, or supplements” as each received 2% or less overall.

While medical and credit card debt is seen as a problem at similar high rates, medical debt is more often seen as a major problem



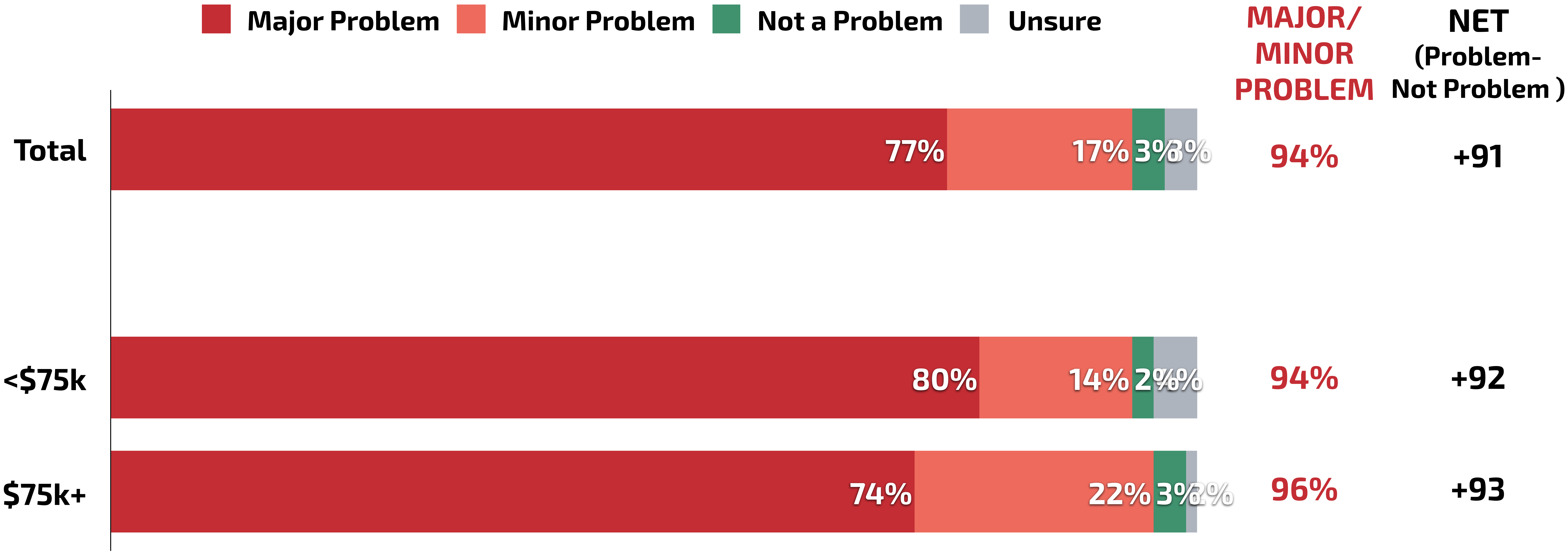
Q. How big of a problem, if at all, do you think each of the following is in America today?

Nearly all voters think medical debt is a problem; the problematic nature of medical debt unites younger and older voters



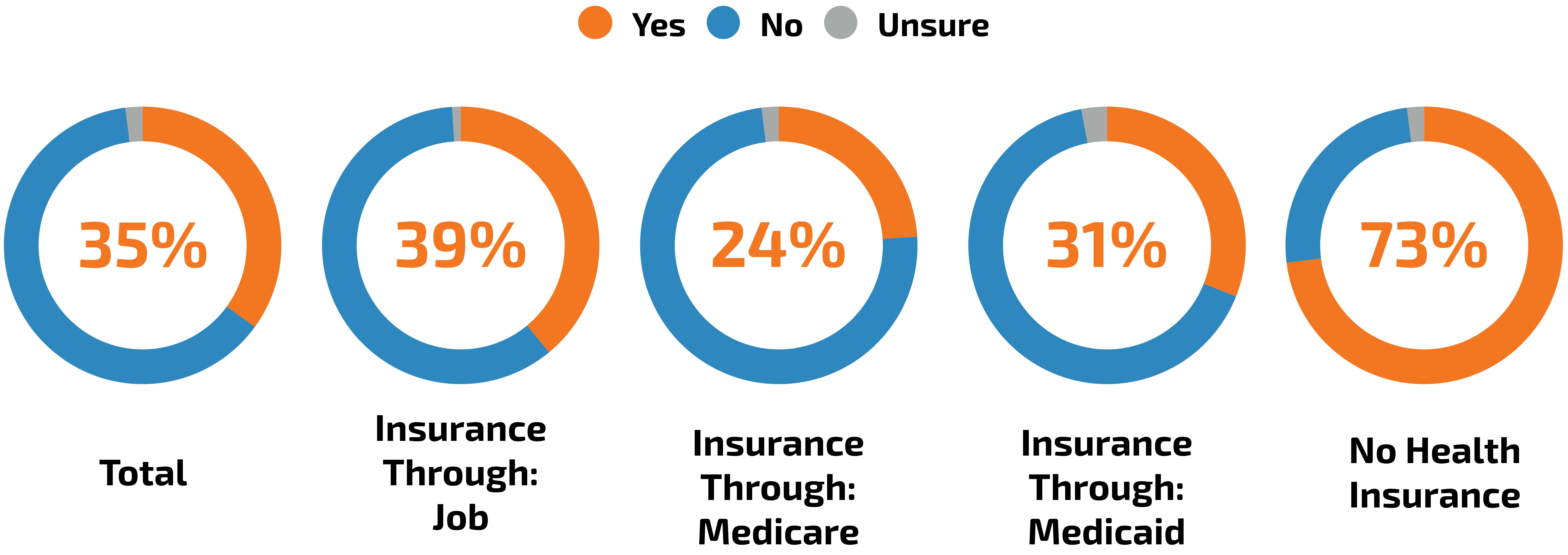
Q. How big of a problem, if at all, do you think each of the following is in America today?

4 out of 5 people who make less than $75k view medical debt as a major problem



Q. How big of a problem, if at all, do you think each of the following is in America today? - Medical debt

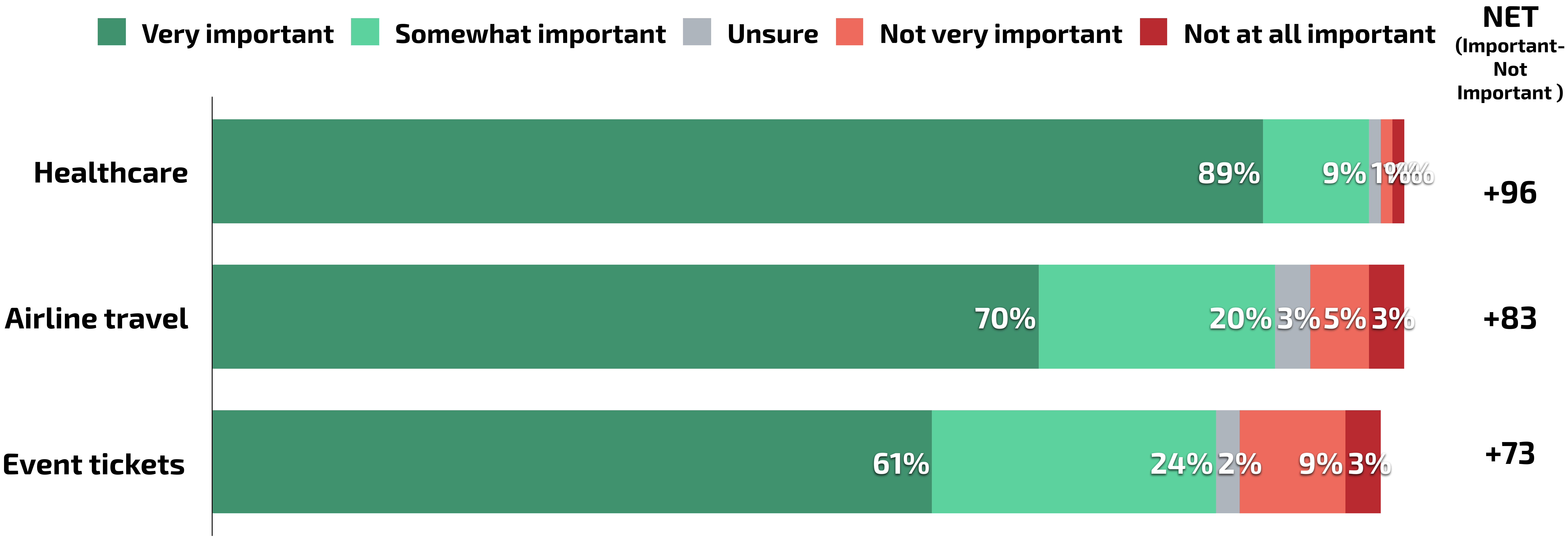
Over a third of voters are postponing or are avoiding medical treatment due to not knowing the cost, including those with and without health insurance



Q. In the last year, have you postponed or avoided seeking medical care due to concerns about not knowing how much that care would cost?

Price Transparency

Nearly all respondents view transparency as critically important for healthcare pricing, even more-so than for airline travel and event tickets



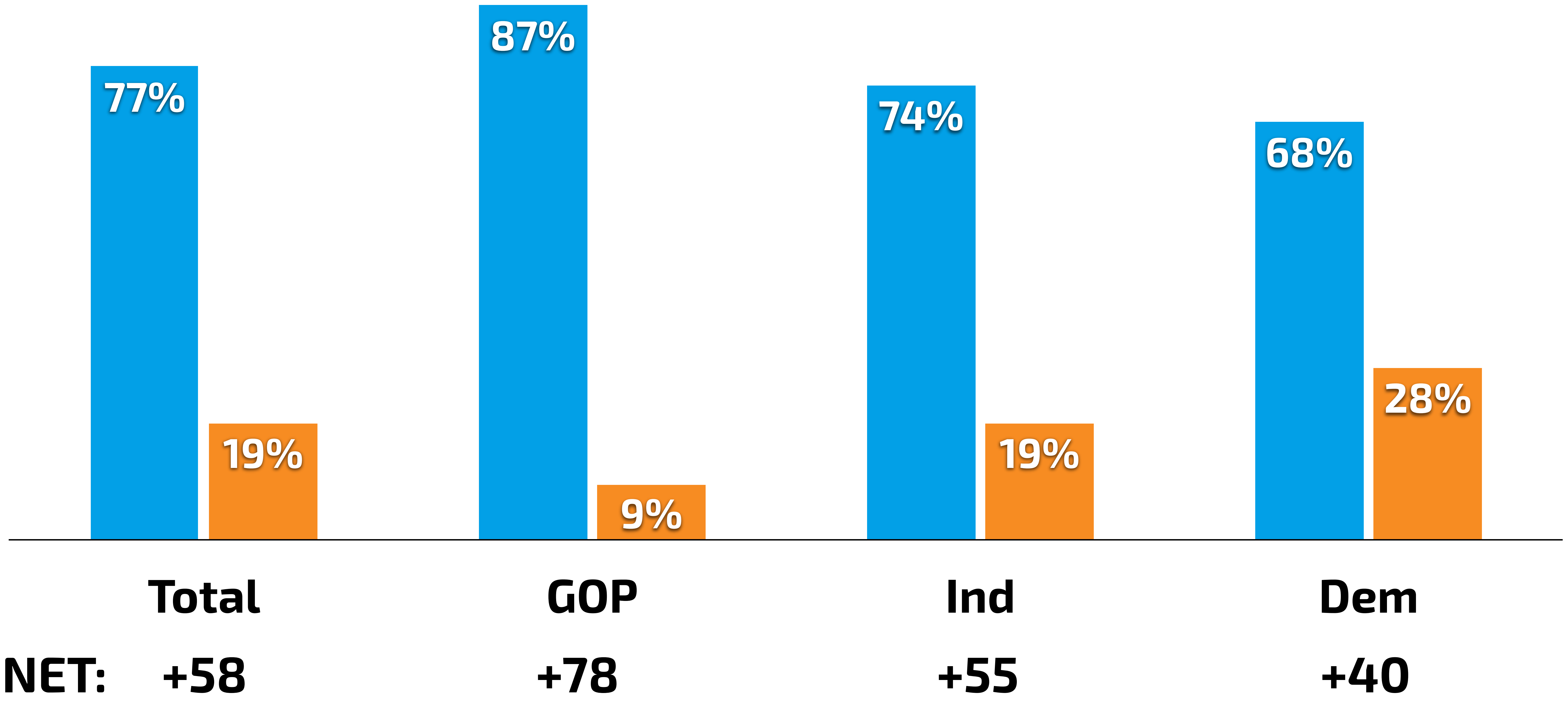
Q. When it comes to hidden prices and fees, how important do you think it is to require transparency in pricing for each of the following?
Note: Event tickets had examples listed: (e.g. concerts, movies, plays, sporting events).

There is an overwhelming desire for price transparency across party lines

I prefer a president who will…

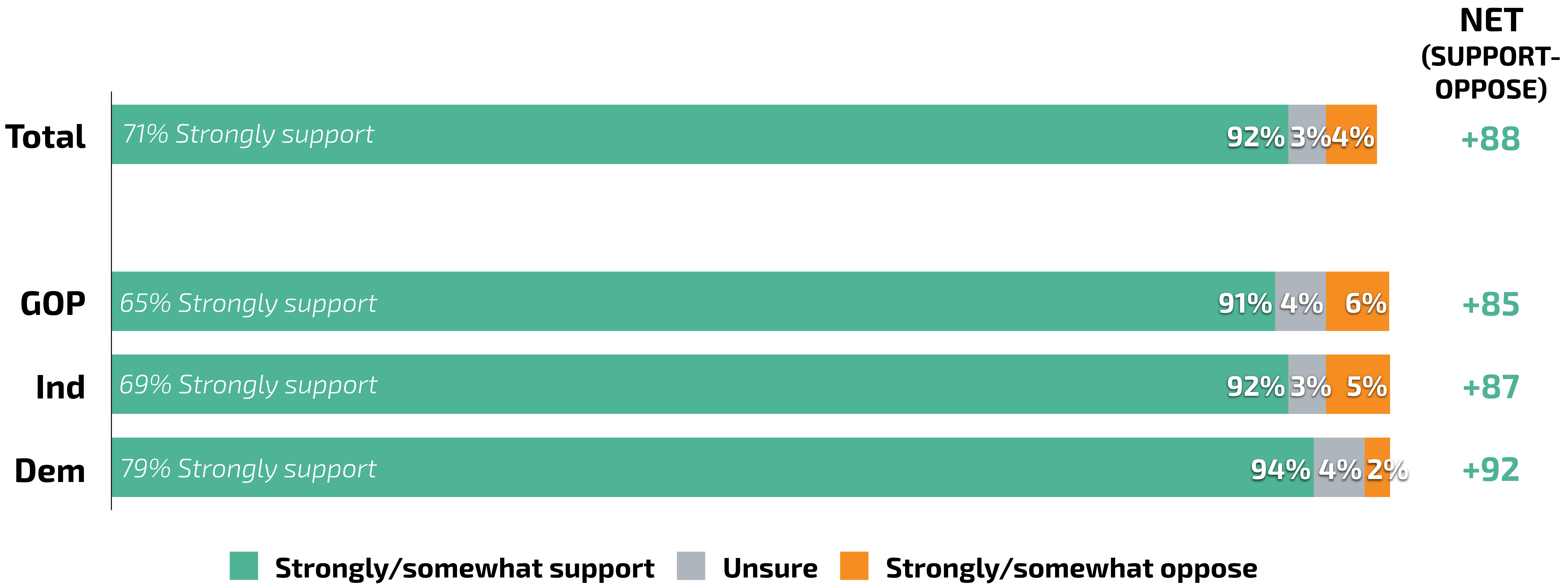
Demand transparency in healthcare prices and billing so consumers are protected from overcharging and benefit from lower costs through competition and choice.

Allow government to set price controls for some healthcare services and certain drugs.



Q. Even if neither is perfect, please indicate which statement is closer to your view.

Nearly all voters support price transparency without hearing any messages; nearly two thirds or more of voters in each party strongly support



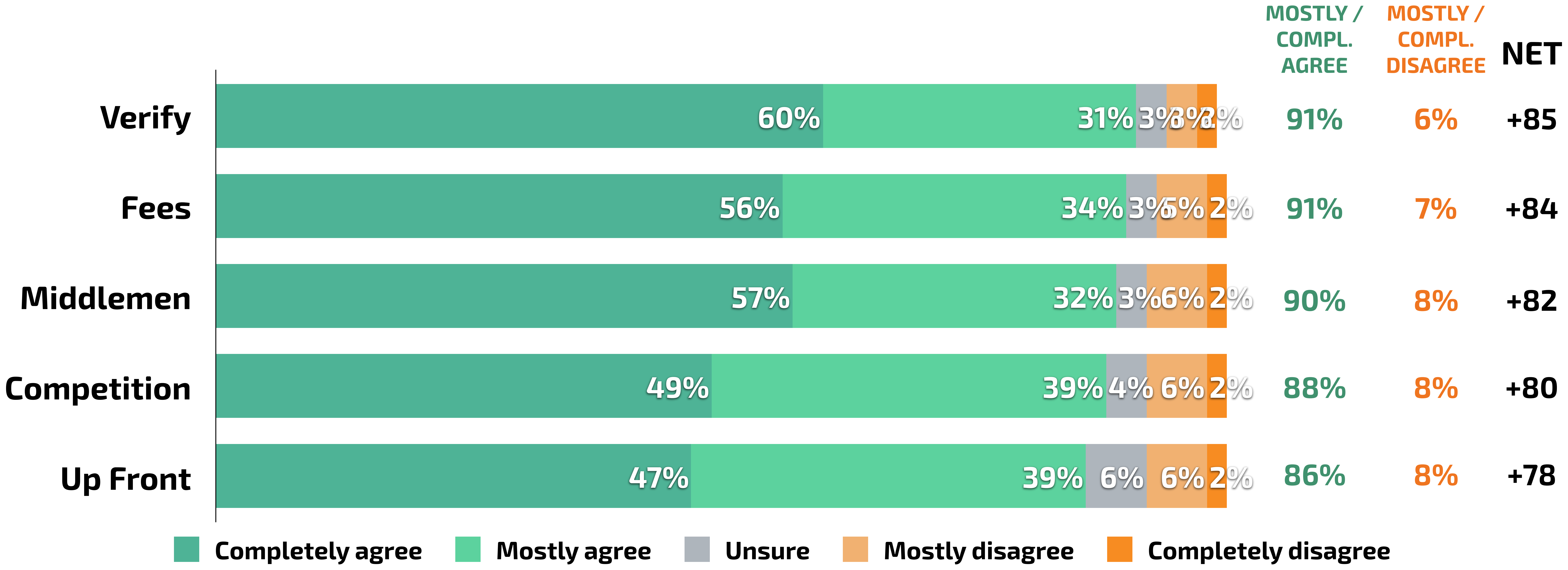
Q. By law, hospitals must post their prices online for consumers, and those who do not can be fined up to $5,500 a day by the federal government. Only 34.5% of hospitals are in full compliance, but only 14 hospitals have been fined. Would you support or oppose the federal government requiring hospitals and health insurance companies to provide real, actual prices - not estimates - to patients before they receive care?

Messaging For Transparency

Verify	Employers and others who pay health insurers for coverage should be able to **verify** that health insurance companies are accurately reporting how much they really pay health care providers for the services and treatments they provide patients.
Fees	Requiring real healthcare prices to be shared with patients upfront would help protect workers from overcharges and hidden **fees** that are driving higher healthcare costs and medical debt upward.
Middlemen	**Middlemen** involved in things like managing prescription benefits, administering insurance claims, creating networks and other services, need to be more transparent instead of making it difficult to see where the money is going and how costs are determined.
Competition	Allowing consumers to see the real prices of healthcare services nationwide would lead to more **competition** and lower the cost of coverage and healthcare.
Up Front	Access to real healthcare prices **upfront** would allow small businesses and American job creators to shop and save money, money they could use to provide higher pay to workers.

Q. Please tell me whether you completely agree, mostly agree, mostly disagree or completely disagree with the following arguments <u>for</u> transparency in medicine.

Large majorities agree with each message tested in support of price transparency



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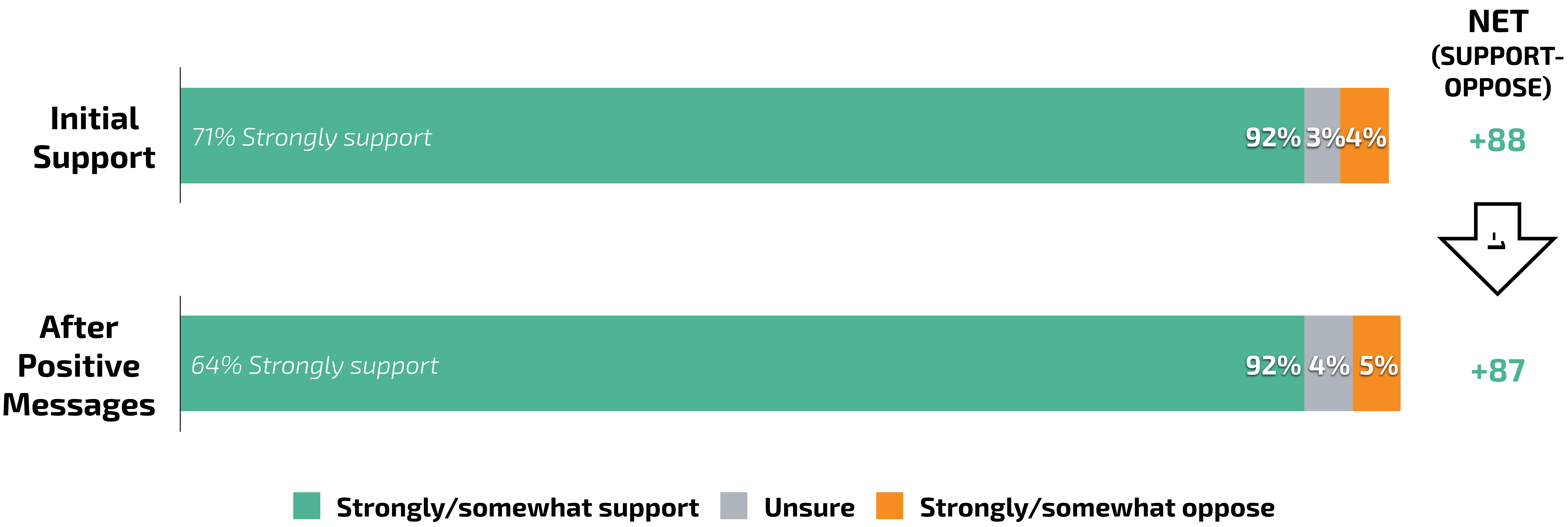
Already high support of price transparency remains unchanged after positive messages



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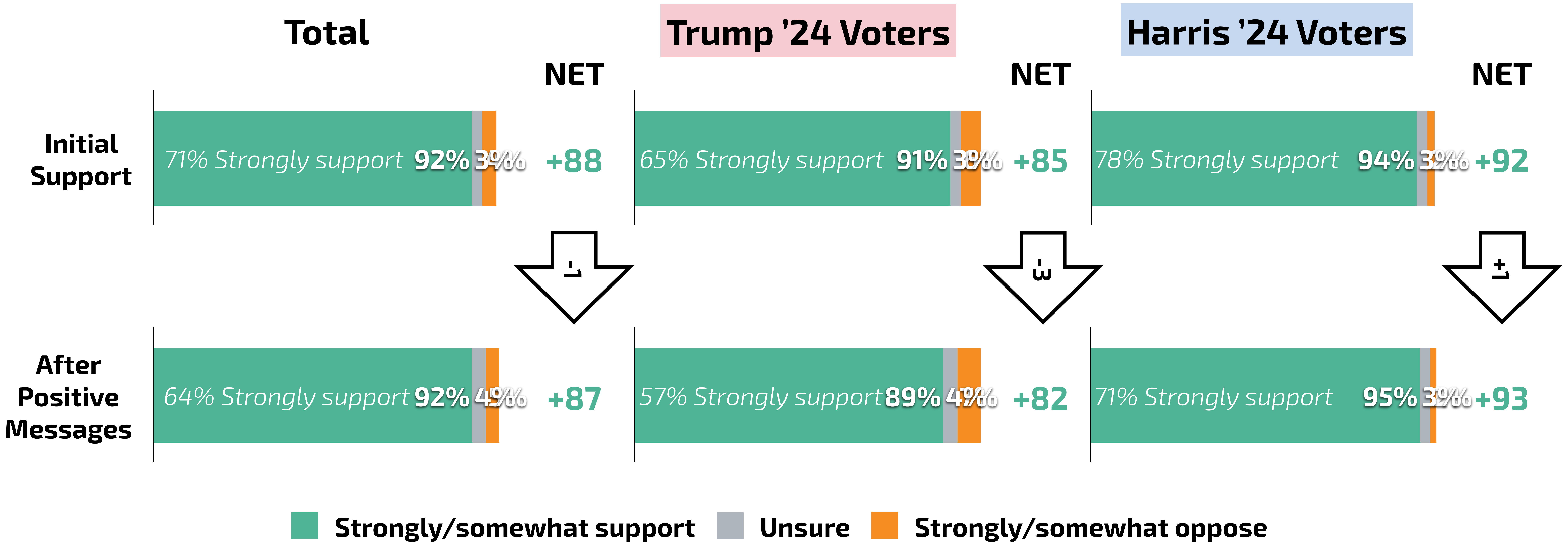
Q. Having heard these arguments, would you now say you support or oppose the federal government requiring hospitals and health insurance companies to provide real, actual prices - not estimates - to patients before they receive care?

Strong support of price transparency decreases with messaging; nearly 9-in-10 overall support remains across political lines



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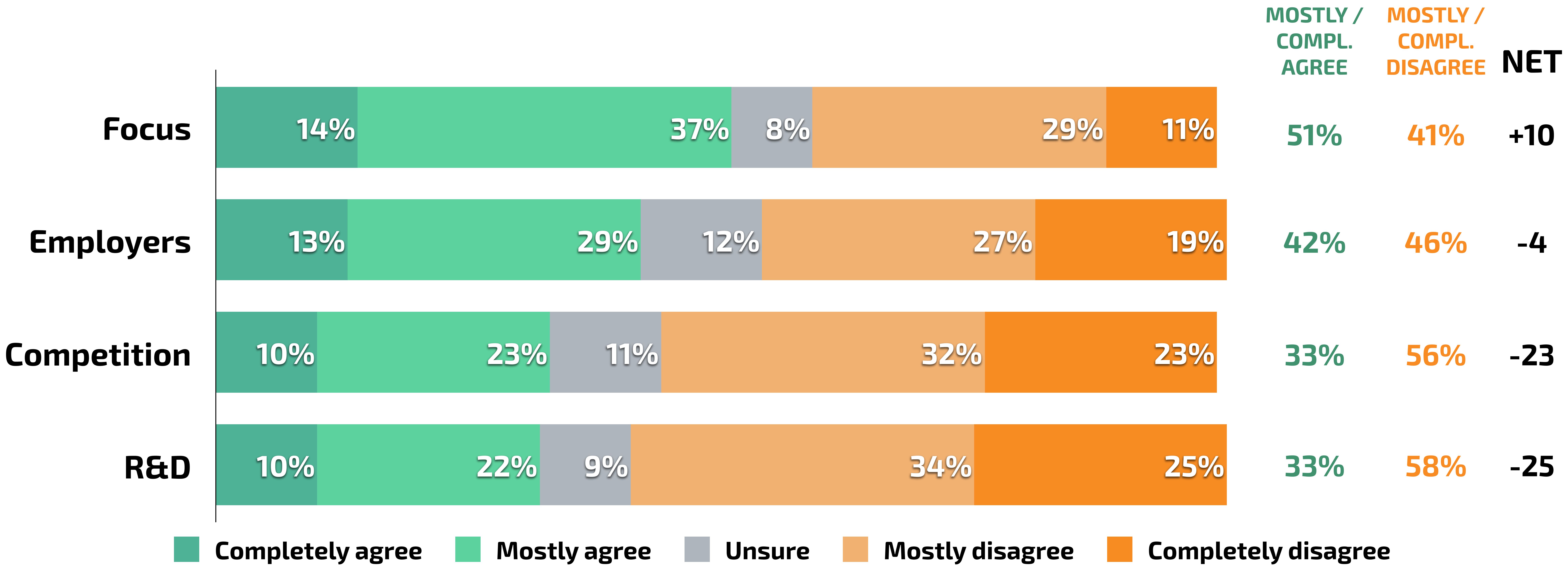
Q. Having heard these arguments, would you now say you support or oppose the federal government requiring hospitals and health insurance companies to provide real, actual prices - not estimates - to patients before they receive care?

Messaging Against Transparency

Focus	Transparency may unintentionally make patients **focus** too much on price and choose cheaper options that are not necessarily best for their health.
Employers	If **employers** can see which employees cost more than others, they will make higher cost employees pay more for their medical care.
Competition	Transparency could inadvertently reveal sensitive information about pricing strategies or negotiated rates, which might harm **competition**.
R&D	If companies in the health care industry have to explain what makes up the price of the treatments they provide, they'll have less ability to do necessary but expensive **research and development.**

Q. Please tell me whether you completely agree, mostly agree, mostly disagree or completely disagree with the following arguments against transparency in medicine.

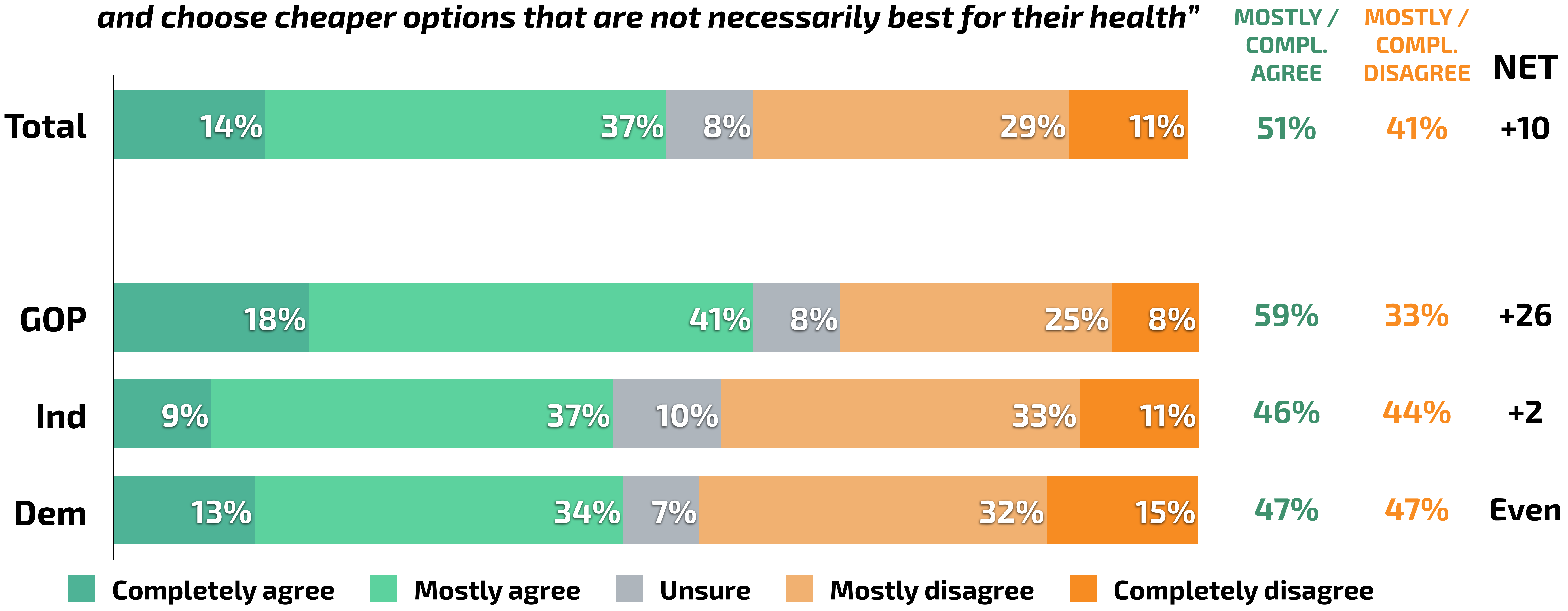
Most messages opposing price transparency do not perform nearly as well as messages in support



Q. Please tell me whether you completely agree, mostly agree, mostly disagree or completely disagree with the following arguments <u>against</u> transparency in medicine.

Care should be taken when describing cheaper as better; a slim majority worries this could result in patients choosing options that aren't best for their health

"Transparency may unintentionally make patients focus too much on price and choose cheaper options that are not necessarily best for their health"



Q. Please tell me whether you completely agree, mostly agree, mostly disagree or completely disagree with the following arguments against transparency in medicine.

Survey Demographics

GENDER

46% Male
53% Female
<1% In some other way

AGE

22% 18-34
22% 35-49
27% 50-64
29% 65+

RACE

76% White
13% Black or African American
11% Hispanic or Latino
4% Asian
2% Native American or Alaska Native
1% Native Hawaiian or Other Pacific Islander
1% Other race or ethnicity

HOUSEHOLD INCOME

23% Less than $30,000
18% $30,000 to $49,999
20% $50,000 to $74,999
11% $75,000 to $99,999
7% $100,000 to $124,999
20% $125,000 or more
1% Prefer not to say

HEALTH INSURANCE

30% through job
22% through Medicare
19% through Medicaid
15% Medicare Advantage plan
11% individual plan
5% other kind of coverage
5% not insured

PARTY

39% Democrat
39% Republican
21% Independent
<1% Member of another Party
1% Unsure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