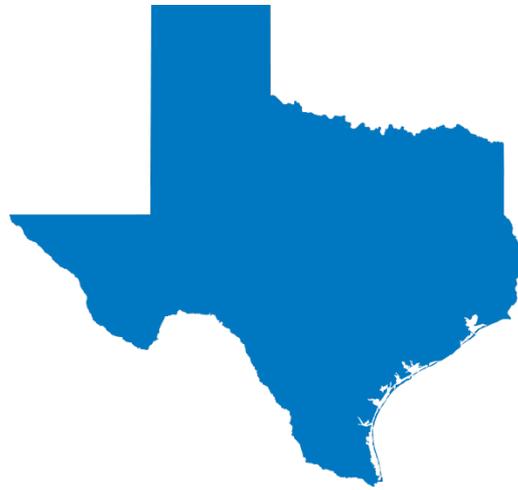


Texas Consumer Health Care Survey 2018



From the Texas Medical Center Health Policy Institute



Arthur "Tim" Garson, Jr., MD, MPH
Director
Garson@TMC.edu



Stephen H. Linder, PhD
Associate Director
SLinder@TMC.edu



Ryan Holeywell
TMC Director of Communications
RHoleywell@TMC.edu

The Nation's Pulse: Year Four

- This year, we surveyed 4,000 participants
 - 1,000 from Texas
 - 3,000 from the other 49 states
- Survey was completed June-July 2018
- Luminas, LLC used a standard online protocol
- * $p < 0.05$ significant difference
 - with $N=4,000$, so “small” differences count

Fixing Health Care: Four Key Areas



Fixing Health Care:
Priorities



Fixing Health Care:
**Health Insurance and
Health Care Delivery**



Fixing Health Care:
Healthy Lifestyles



Fixing Health Care:
Presidential Election Insights

Fixing Health Care

Priorities



For Texans, similar to all Americans, the top priority is reducing health care costs, followed by health insurance affordability and universal coverage

US Health Care Priorities – By Mean Rank

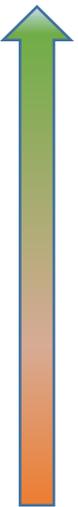


Texas



National

Highest Priority



Lowest Priority

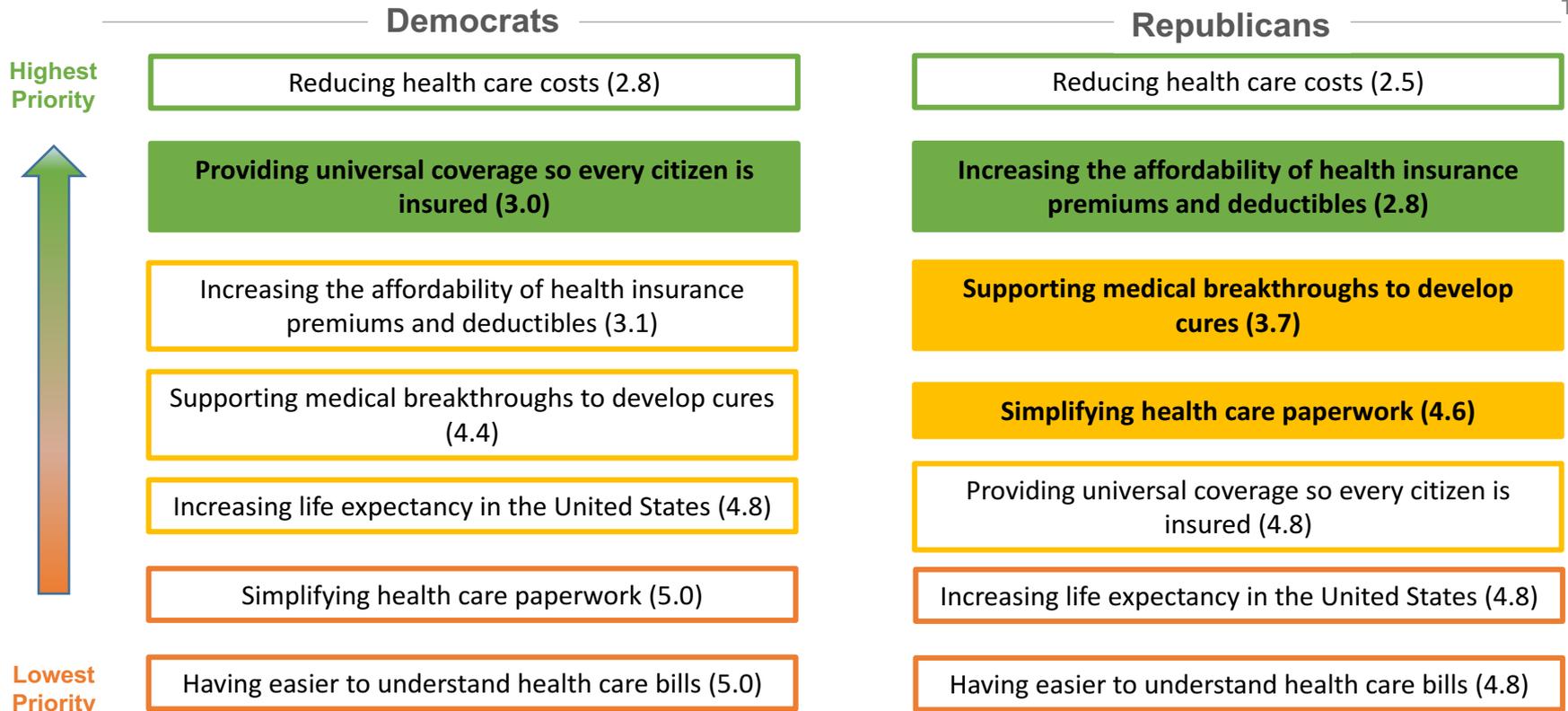
- Reducing health care costs (2.5)
- Increasing the affordability of health insurance premiums and deductibles (3.0)
- Providing universal coverage so every citizen is insured (3.9)
- Supporting medical breakthroughs to develop cures (4.1)
- Increasing life expectancy in the United States (4.8)
- Simplifying health care paperwork (4.9)
- Having easier to understand health care bills (4.9)

- Reducing health care costs (2.5)
- Increasing the affordability of health insurance premiums and deductibles (3.0)
- Providing universal coverage so every citizen is insured (3.7)
- Supporting medical breakthroughs to develop cures (4.2)
- Increasing life expectancy in the United States (4.8)
- Simplifying health care paperwork (4.9)
- Having easier to understand health care bills (5.0)

BASE: ALL QUALIFIED RESPONDENTS (n=1018 Texas; n=3910 National excl. Texas)
 Q100 Below are several statements describing key US healthcare priorities. Based on your opinion, please rank these statements, in the order of priority where 1 is the highest priority and 7 is the lowest priority for the US healthcare system.

In Texas, affordability, supporting medical breakthroughs, and simplifying paperwork rank higher with Republicans; Democrats say universal coverage is the priority

US Health Care Priorities – By Mean Rank

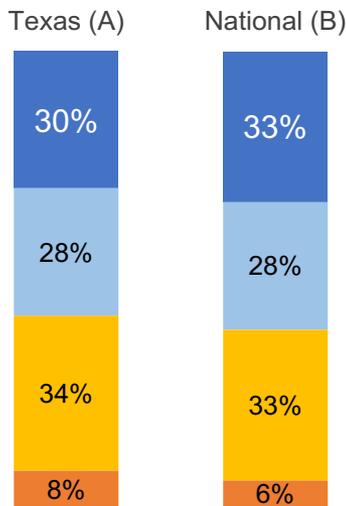


BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas/n=313 Democrats/n=370 Republicans)

Q100 Below are several statements describing key US healthcare priorities. Based on your opinion, please rank these statements, in the order of priority where 1 is the highest priority and 7 is the lowest priority for the US healthcare system.

Over half are likely to vote for a candidate who will make fixing health care a priority

Likelihood to Vote for Candidates Who Prioritize Fixing Health Care

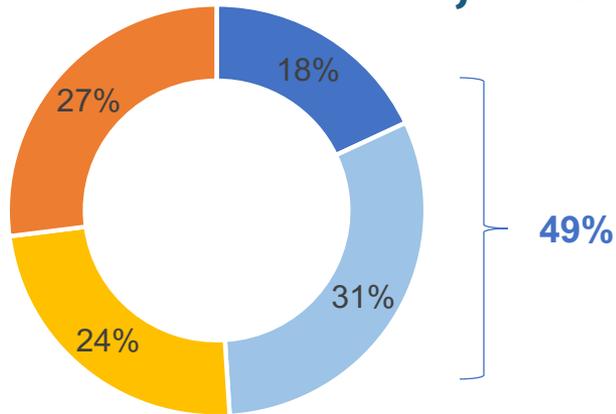


- Very likely
- Likely
- Somewhat likely
- Not at all likely

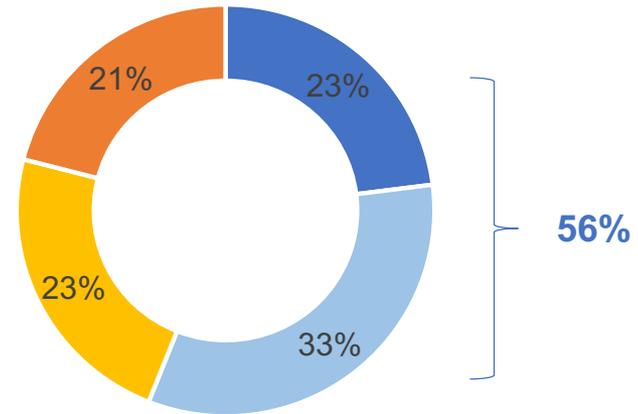
BASE: ALL QUALIFIED RESPONDENTS (n=1018 Texas; n=3910 National excl. Texas)

Q162 How much do you agree or disagree with the following statements? // Q165 How likely are you to only vote for candidates who will make fixing healthcare a priority?

About half report cutting down on other expenses to pay for health care; worse in Texas



I have to cut down on other expenses to pay for health care

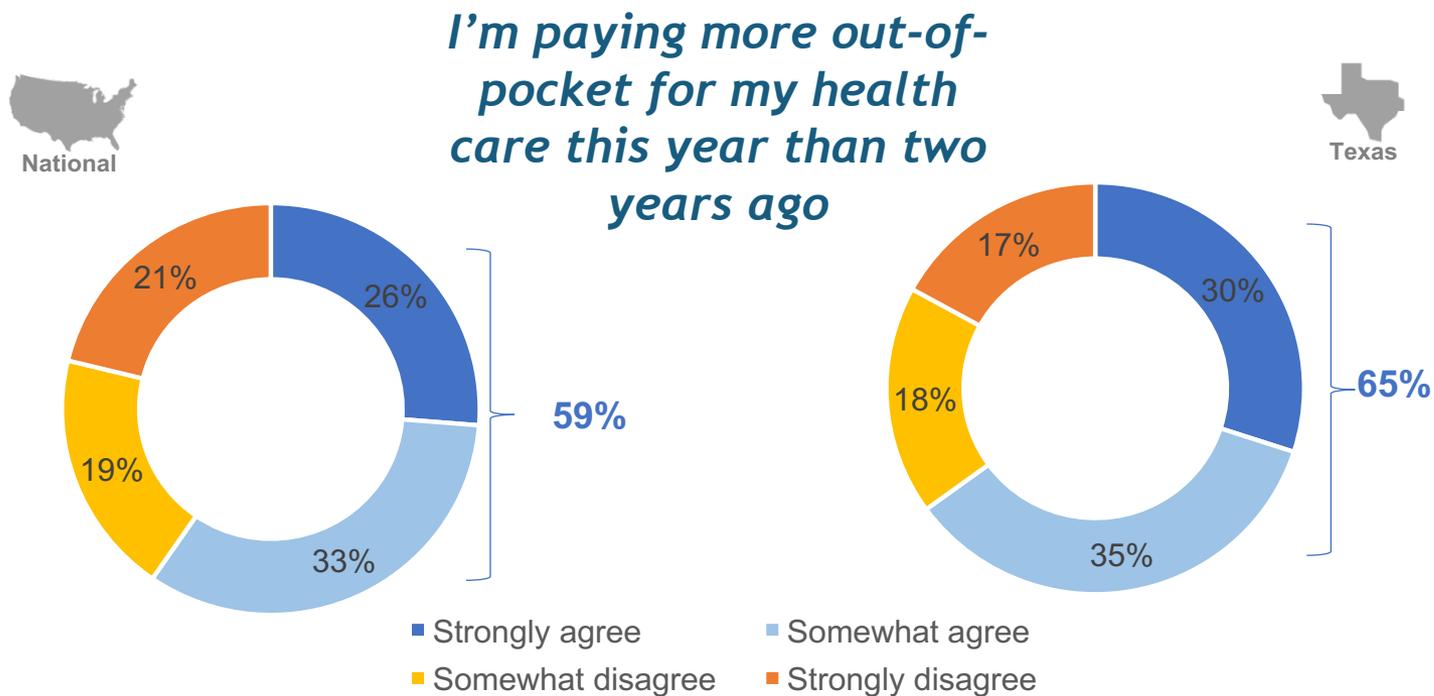


- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

BASE: ALL QUALIFIED RESPONDENTS (n=4020)

Q220 Now please tell us how much you agree or disagree with each of the statements below.

Six in ten say they are paying more out-of-pocket for health care this year than two years ago; Texans worse



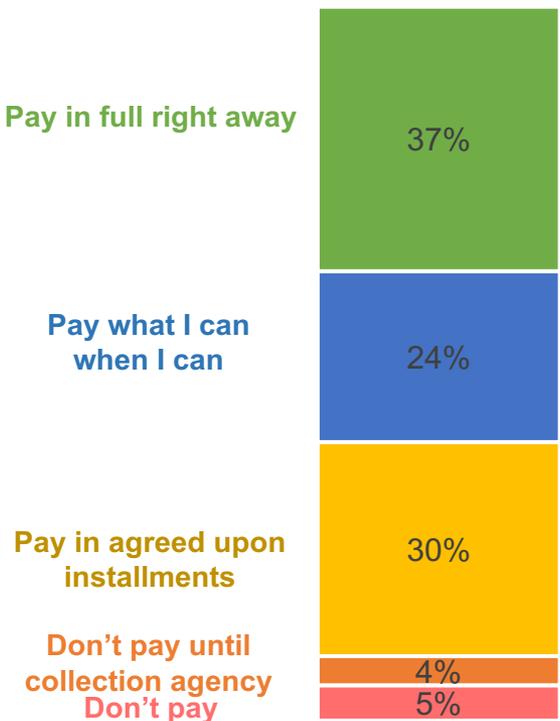
BASE: ALL QUALIFIED RESPONDENTS (n=4020)

Q220 Now please tell us how much you agree or disagree with each of the statements below.

As with the rest of the US, when Texans receive a costly medical bill, only a minority – 37% - can pay it in full right away; over half pay in agreed upon installments or when they can



Action When Receiving Costly Medical Bill



Males, whites, Texans with higher income, and insured are much more likely to pay medical bills in full right away

BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)
Q217 When you receive a costly medical bill, which of the following best describes how you usually handle it? Select one response only.

Similar to the rest of the country, discussing cost and affordability of tests and procedures is not commonplace in Texas; however, Texans are much more likely than others to already have *cost* related discussions with doctors and to welcome more of those discussions



Topics Discussed with Primary Doctor

Actually Discuss — Want to Discuss



Texans are significantly more likely than **all other Americans** to report discussing **cost of procedures** and drugs with doctors;

Texans also much more often than **the rest of the US** report wanting to have **cost related discussions** with their doctors

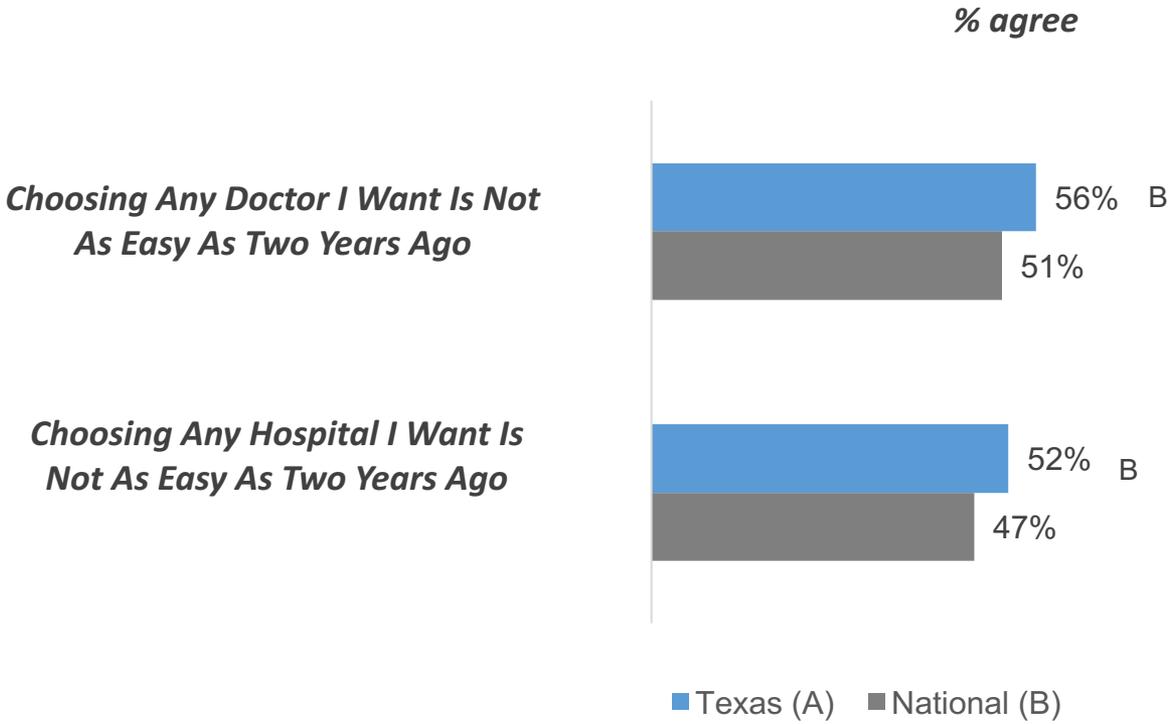
BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)

Q255. Does the doctor you see most often discuss the following directly with you...? // Q260. Do you want your doctor to discuss the following directly with you...?

TMC

TEXAS
MEDICAL
CENTER

Similar to most Americans, Texans value physician choice, but they are significantly more likely than others to report difficulty choosing preferred doctors and hospitals compared to two years ago



BASE: ALL QUALIFIED RESPONDENTS (n=1018 Texas; n=3910 National excl. Texas)
Q220 Now please tell us how much you agree or disagree with each of the statements below.
Q275 Please tell us how important is each of the following to you or your family

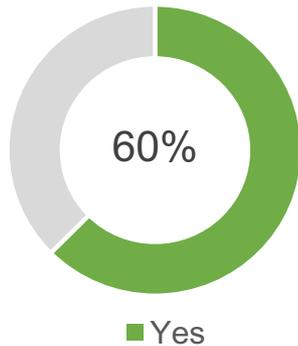
Fixing Health Care

Health Insurance and Health Care Delivery

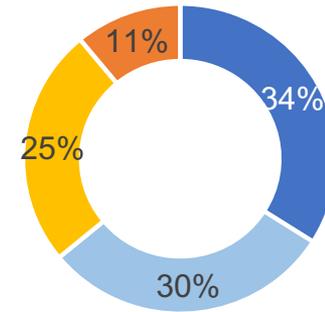


A majority of Texans and US adults in other non-expansion states support Medicaid expansion; about two-thirds say it's important the candidate they vote for feels the same

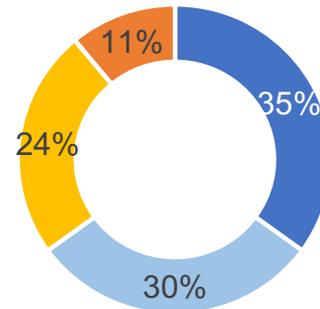
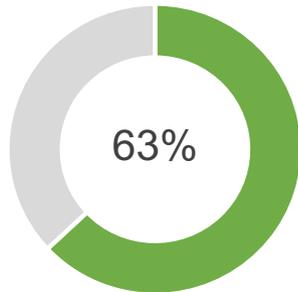
Support for Medicaid Expansion



Importance that Candidate You Vote for Feels the Same



- Very important
- Important
- Somewhat important
- Not at all important

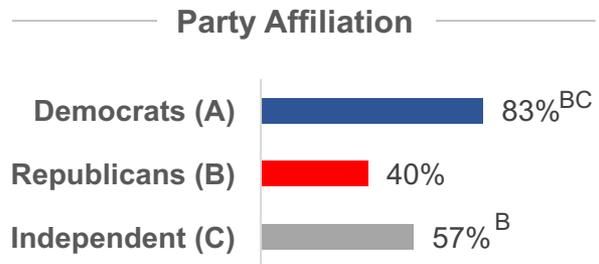
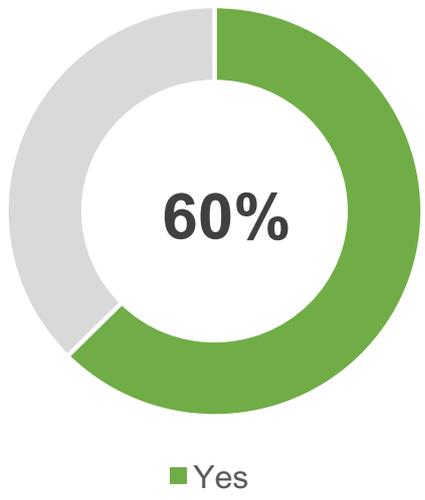


BASE: QUALIFIED RESPONDENTS IN NON-EXPANSION STATES (n=1018 Texas; n=1217 Non-Expansion States excl. Texas)
 Q110a Are you in favor of your state expanding Medicaid insurance coverage to more low-income adults?
BASE: QUALIFIED RESPONDENTS IN NON-EXPANSION STATES (n=1018 Texas; n=1217 Non-Expansion States excl. Texas)
 Q120 How important is it to you that a political candidate you vote for feels the same way you do on the following...?

In Texas, support for Medicaid expansion is significantly higher among Democrats, females, minorities, Gen-Xers and Millennials, lower income families, families with children and urban populations



Support for Medicaid Expansion (% Yes)

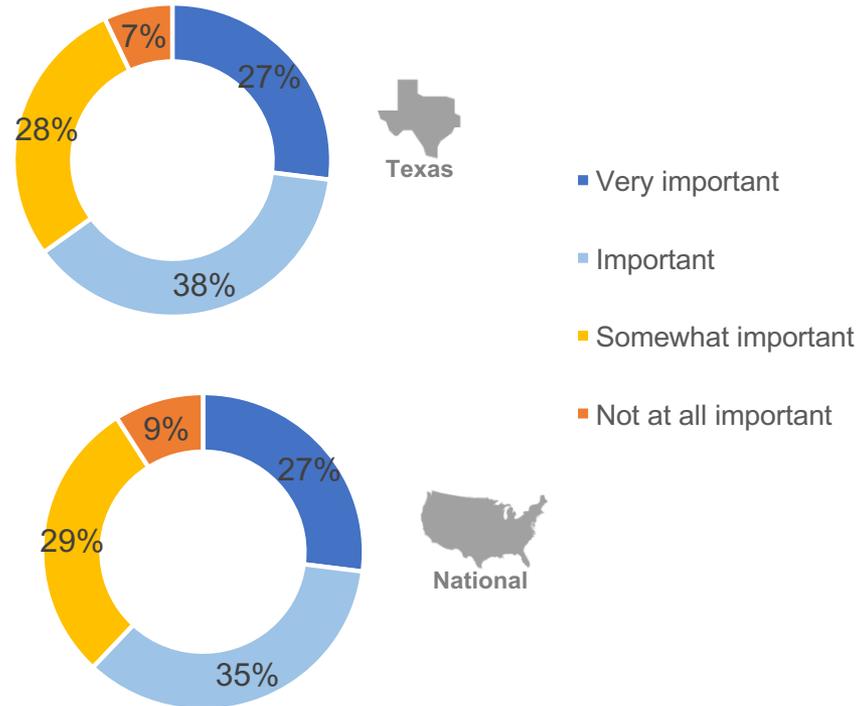


Females, minorities, particularly Black/AAs, younger Texans, households with children, those with lower income and those living in urban areas are significantly more likely to support Medicaid expansion

BASE: QUALIFIED RESPONDENTS IN TEXAS (Total n=1018/Democrats n=313/Republicans n=370/Independent n=260)
Q110a Are you in favor of your state expanding Medicaid insurance coverage to more low-income adults?

Majority say it's important that the candidate they vote for feels the same about Medicaid

Importance that Candidate You Vote for Feels the Same



BASE: ALL QUALIFIED RESPONDENTS (n=1018 Texas; n=3910 National excl. Texas)

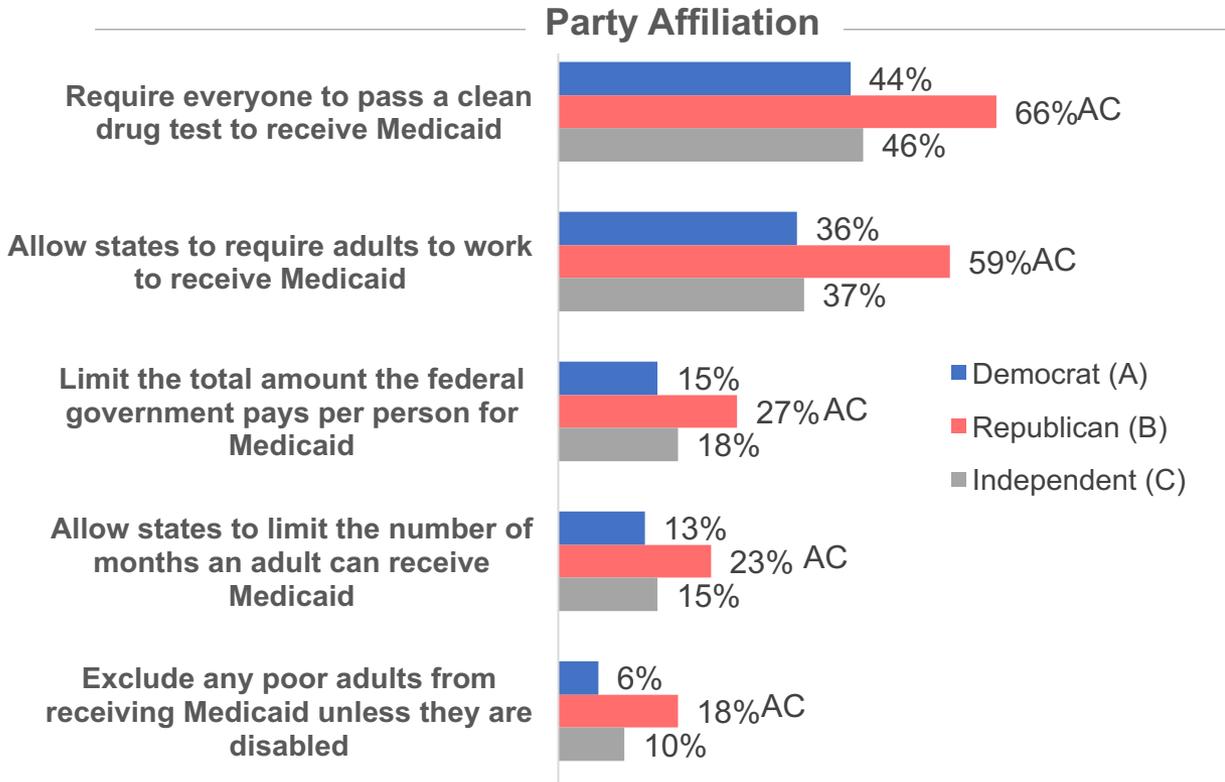
Q115 Recently, there have been some changes proposed to the Medicaid program. Which proposed changes to Medicaid listed below, if any, are you in favor of? Please select all that apply. // Q120 How important is it to you that a political candidate you vote for feels the same way you do on the following...?

TMC

TEXAS
MEDICAL
CENTER

In Texas, Republicans are significantly more supportive of restrictions/conditions for receiving Medicaid than Democrats and Independents

Support for Proposed Changes to Medicaid



In Texas, **Whites, Latinos** and **those age 30+** are significantly more likely to support a clean drug test than **Black/AAs** and **those age 18-29**

BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (Total n=1018/Democrats n=313/Republicans n=370/Independent n=260)

Q115 Recently, there have been some changes proposed to the Medicaid program. Which proposed changes to Medicaid listed below, if any, are you in favor of? Please select all that apply.

TMC

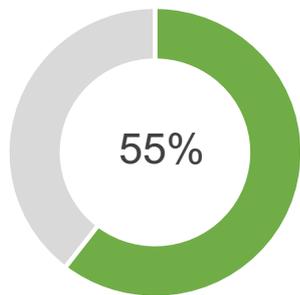
TEXAS
MEDICAL
CENTER

Similar to the rest of the country, just over half of Texans, particularly those under the age of 45, support expanding Medicare to all US adults

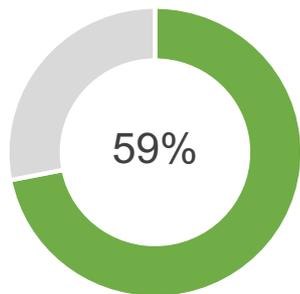
Support for Medicare for All US Adults



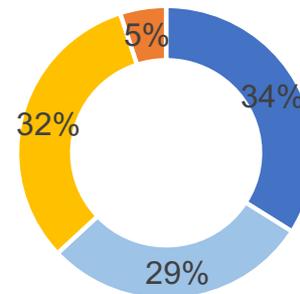
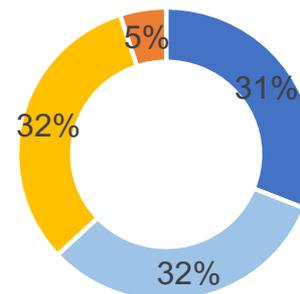
Texas
(A)



■ Yes



Importance that Candidate You Vote for Feels the Same



- Very important
- Important
- Somewhat important
- Not at all important

More support from **Democrats, Independents, Latinos, Other Minorities**



National
(B)

BASE: ALL QUALIFIED RESPONDENTS (n=1018 Texas; n=3910 National excl. Texas)

Q122 Are you in favor of the federal government providing Medicare insurance coverage for all US adults? // Q124 How important is it to you that a political candidate you vote for feels the same way you do about having Medicare insurance coverage available to all US adults?

TMC

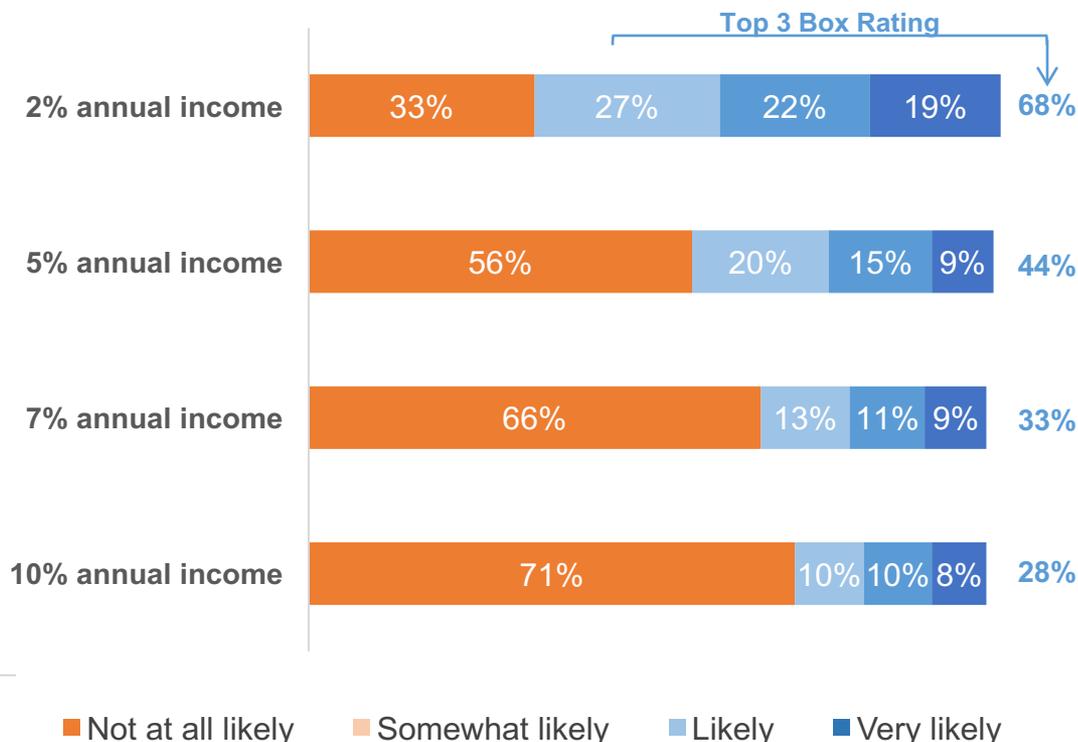
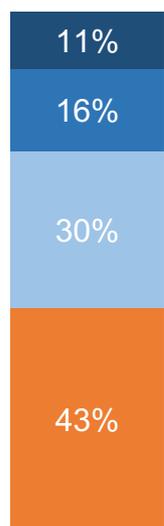
TEXAS
MEDICAL
CENTER

In line with the rest of the country, over half of Texans are at least somewhat likely to consider a catastrophic health insurance plan, particularly if offered at a cost of 2% of annual income

Likelihood to Buy Catastrophic Health Insurance Plan



Overall Likelihood



Males, younger Texans (under the age of 45), those living in urban areas, and households with children are much more likely to consider the plan

Compared to the rest of Americans, however, significantly fewer Texans say that they are *not at all likely* to consider/buy the plan at the cost of 2% of their income

BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)

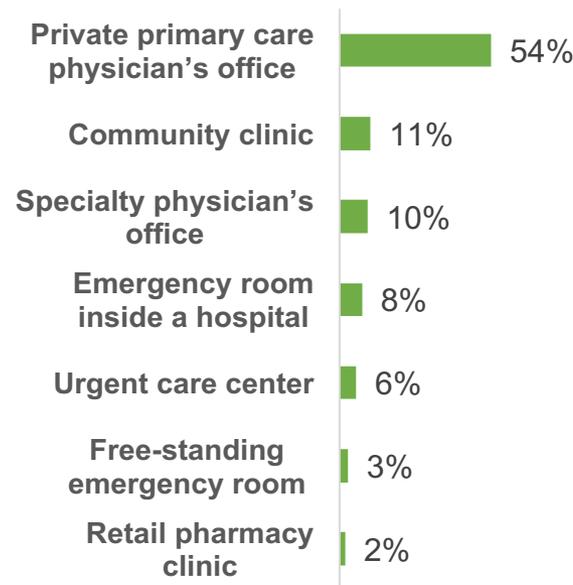
Q206 If the federal government offered a catastrophic health insurance plan that you could buy that only covered chronic diseases, accidents and pregnancy, BUT not routine illnesses, how likely would you be to consider this plan instead of your current plan/consider buying this plan?

Q207 And how likely would you be to consider buying this plan instead of your current plan/consider buying this plan if the cost was...?

Similar to other Americans, barely half of Texans get their primary care in a PCP office



Primary Setting for Healthcare Needs



Texans are much more likely than the **rest of Americans** to visit **community clinics**

BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)

Q450 Overall, how would you describe your health? // Q470 Which setting do you go to most often for your healthcare needs?

Fixing Health Care

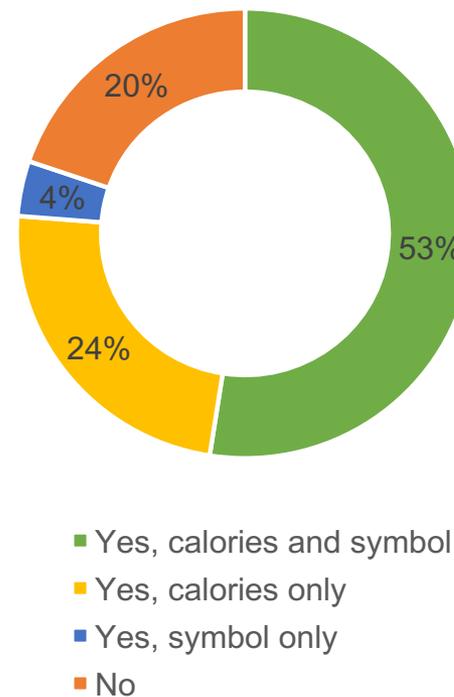
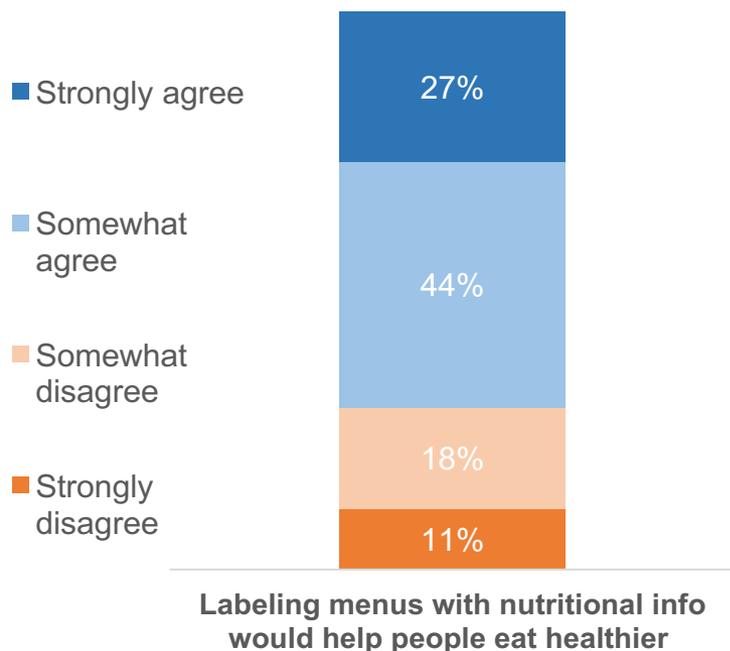
Healthy Lifestyles



Texans generally support menu labeling, with calories included to help people eat healthier



Support for Restaurant Menu Labeling



BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)

Q140 Should all restaurant menu items have labeling either with the number of calories or colored symbols showing the number of calories (i.e., red label/symbol means over 500 calories)?

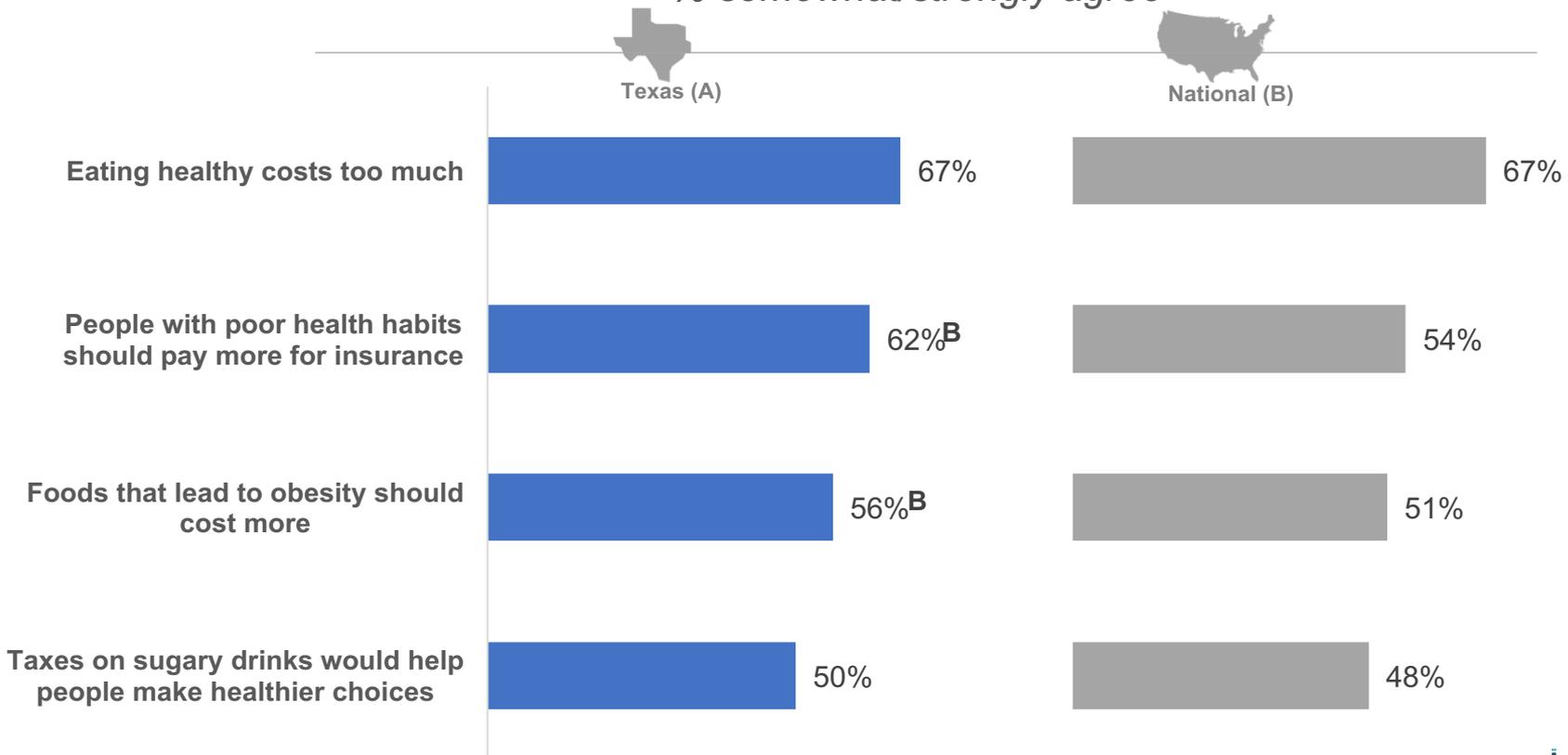
TMC

TEXAS
MEDICAL
CENTER

Two-thirds of Texans say eating healthy costs too much; they are also much more likely than all other Americans to agree that foods that lead to obesity should cost more and people with poor health habits should pay more for health insurance

Agreement with Statements about Health Habits

% somewhat/strongly agree



BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)

Q135 How much do you agree or disagree with each of these statements?

Compared to the rest of the country, there is much higher level of support among Texans for requiring/rewarding use of "ignition interlocks" and lowering blood alcohol limit while driving from .08 to .05

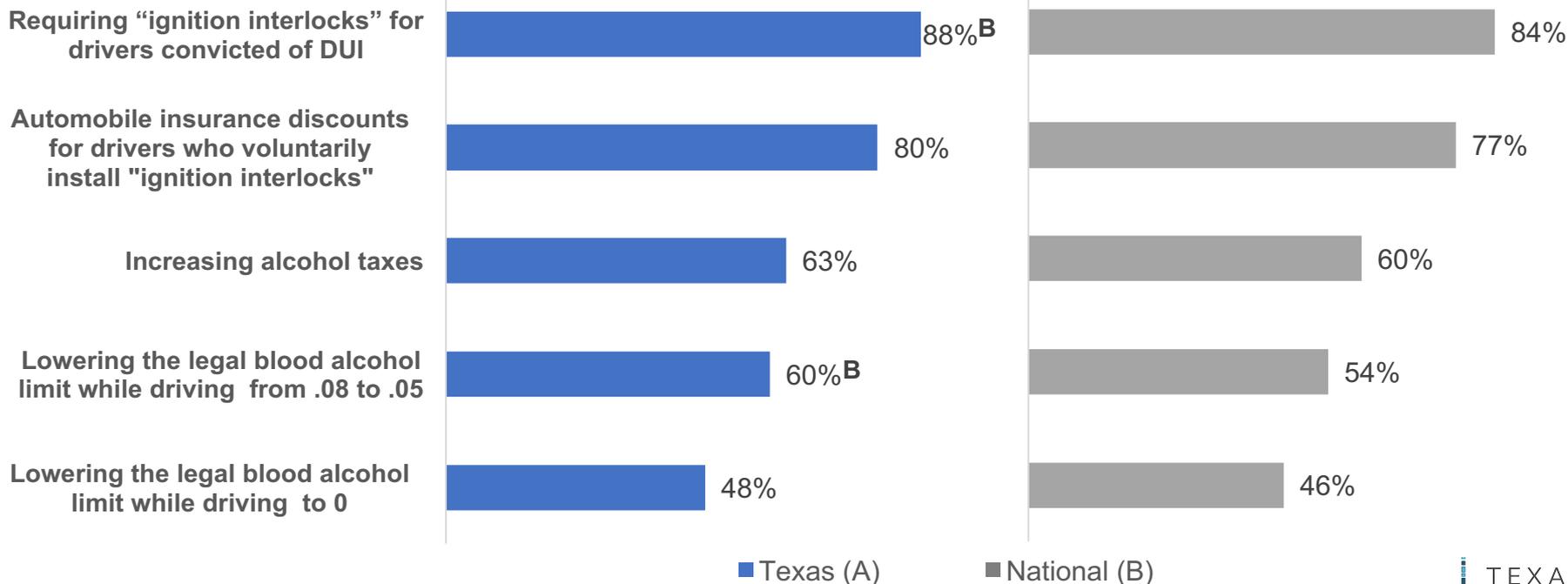
Support for Changes to Road Safety (% support)



Texas (A)



National (B)



BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)

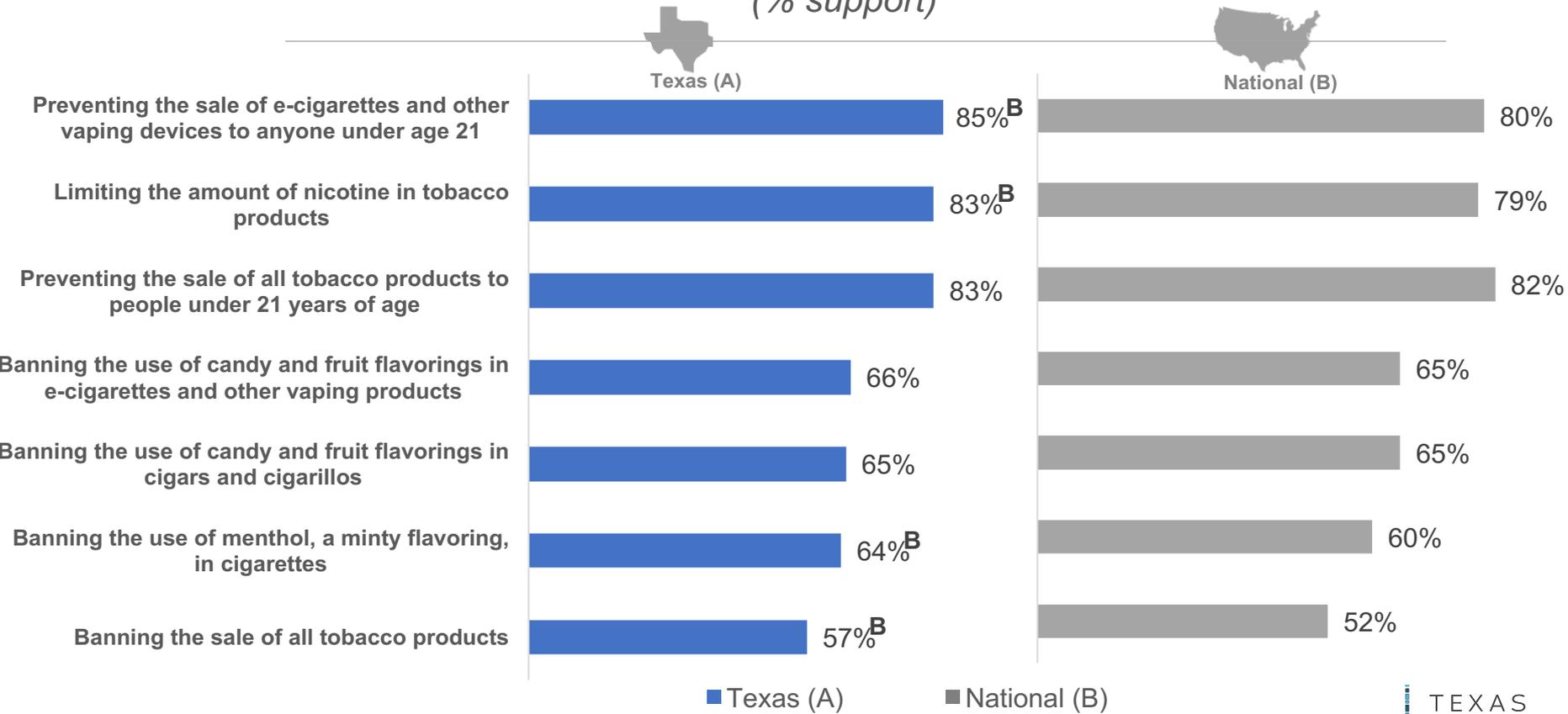
Q145 How strongly would you support or oppose the following approaches to improve road safety?

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MEDICAL
CENTER

Texans are significantly more likely than the rest of Americans to support raising minimum age to buy e-cigarettes and other vaping device to 21, limiting the amount of nicotine in tobacco products and banning tobacco sales completely

Support for Approaches to Reduce Tobacco-Related Illnesses (% support)



BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (n=1018 Texas)
Q155 How strongly would you support or oppose the following approaches to reduce tobacco-related illnesses...?

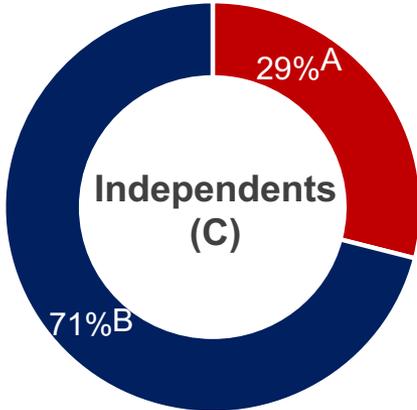
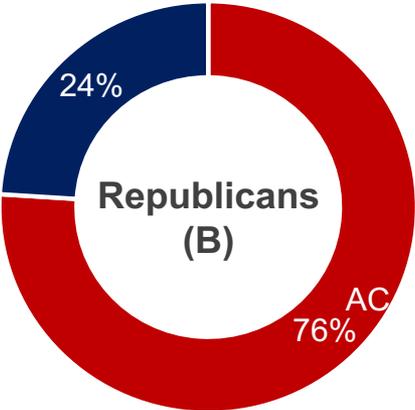
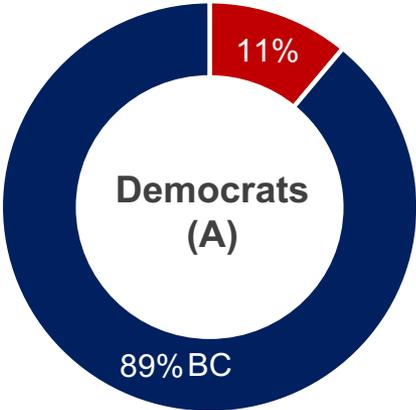
Fixing Health Care

Presidential Election Insights



Trump continues to enjoy strong support among Republicans in Texas, with three out of four planning to vote for him in 2020 regardless of his actions. Independents are swinging blue

Expected Voting in 2020 Presidential Election



Compared to the rest of the US, fewer Independents in Texas plan to vote for Trump in 2020

- Planning to vote for Trump
- Not planning to vote for Trump

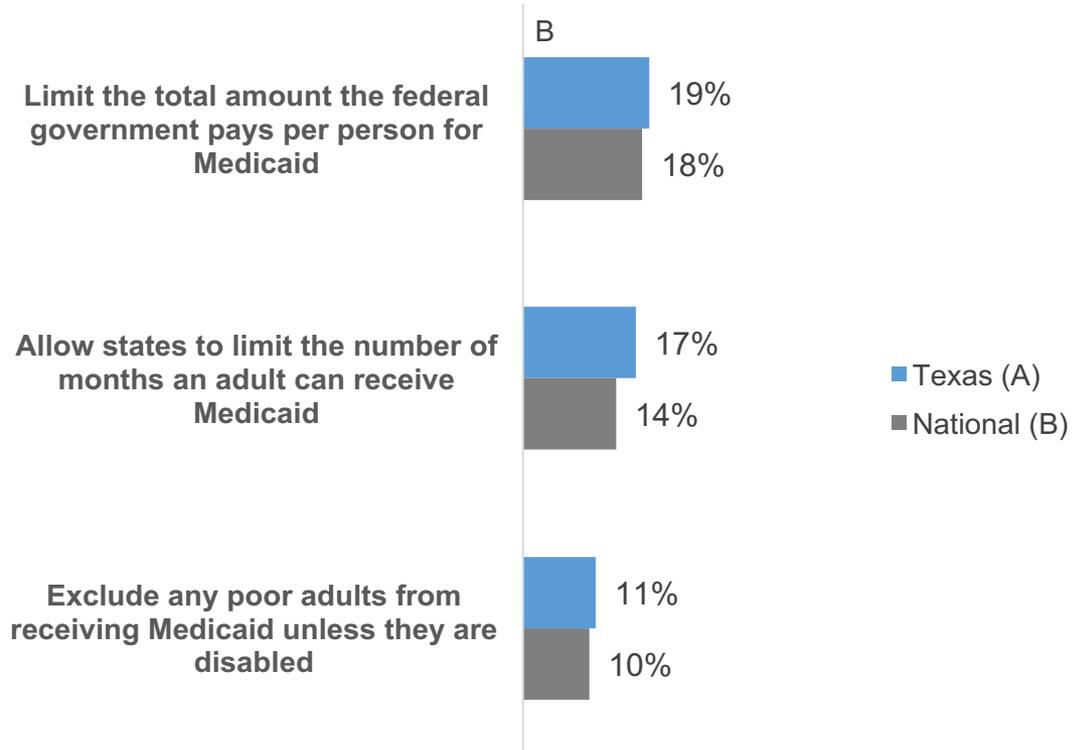
- Planning to vote for Trump
- Not planning to vote for Trump

- Planning to vote for Trump
- Not planning to vote for Trump

BASE: ALL QUALIFIED RESPONDENTS IN TEXAS (Total n=1018/Democrats n=313/Republicans n=370/Independent n=260)
Q170 Assuming President Trump runs for re-election in 2020, which of the statements is most true for how you feel today?

Texas is similar to rest of US with little support for major proposed Medicaid changes

Support for Proposed Changes to Medicaid

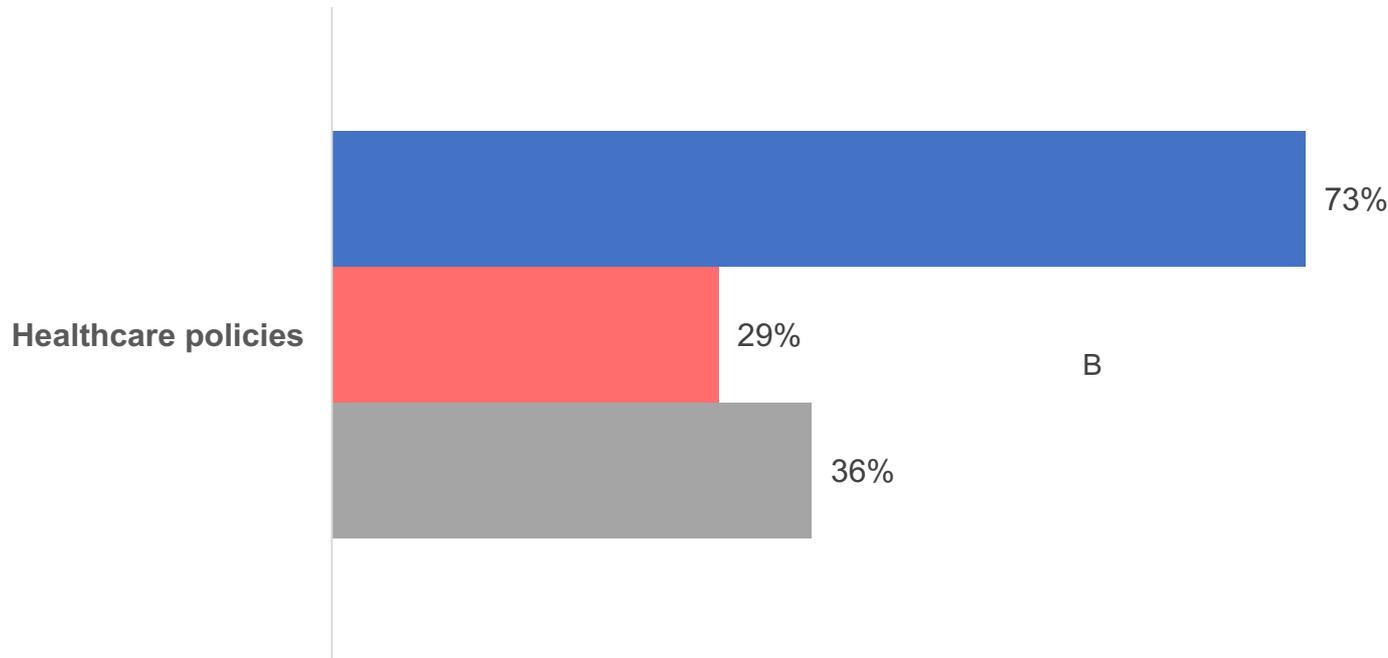


BASE: ALL QUALIFIED RESPONDENTS (n=1018 Texas; n=3910 National excl. Texas)

Q115 Recently, there have been some changes proposed to the Medicaid program. Which proposed changes to Medicaid listed below, if any, are you in favor of? Please select all that apply. // Q120 How important is it to you that a political candidate you vote for feels the same way you do on the following...?

Republicans and Independents who plan to vote for Trump in 2020 are notably *less likely* to change their mind based on Trump's actions on various policy issues compared to Democrats who plan to vote for Trump in 2020

Likelihood that Trump's Actions Would Prevent from Voting for Him in 2020 (% Likely/Very Likely)



- Democrats Planning to Vote for Trump in 2020 (A)
- Republicans Planning to Vote for Trump in 2020 (B)
- Independents Planning to Vote for Trump in 2020 (C)

Caution: small base sizes

BASE: QUALIFIED DEMOCRATS, REPUBLICANS, INDEPENDENTS IN TEXAS WHO PLAN TO VOTE FOR TRUMP IN 2020

(Democrats / Republicans/ Independents Planning to Vote for Trump in 2020 n=33/291/89)

Q175 Again, assuming President Trump runs for re-election in 2020, how likely is it that his actions on each of the following will keep you from voting for him?

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Texas Medical Center Health Policy Institute

www.TMC.edu/Health-Policy

Appendix

Demographics

Demographics

	National (excl. Texas)	Texas
Gender		
Male	46%	45%
Female	54%	55%
Age		
18-44	45%	46%
45-64	35%	33%
65+	20%	21%
Household Size		
1	24%	20%
2	33%	33%
3	18%	16%
4	15%	18%
5 or more	11%	12%
Children under 18 in Household		
Yes	41%	44%
No	59%	56%
Marital Status		
Never married	27%	23%
Married/Living with Partner	55%	58%
Widowed/Divorced/Separated	18%	19%

Demographics

	National (excl. Texas)	Texas
Race/Ethnicity		
White	65%	56%
Black/African-American	12%	11%
Hispanic	14%	27%
All others	9%	7%
Annual Income		
Less than \$15k	8%	7%
\$15k to less than \$25k	9%	9%
\$25k to less than \$30k	9%	10%
\$35k to less than \$50k	13%	13%
\$50k to less than \$75k	18%	19%
\$75k to less than \$100k	14%	13%
\$100k+	30%	30%
Insurance Status		
Insured	92%	86%
Uninsured	8%	14%
Party Affiliation		
Democrat	39%	34%
Independent	27%	24%
Republican	27%	35%
None of the above	6%	8%

Demographics

	National (excl. Texas)	Texas
Education		
Less than HS/Some HS	9%	8%
Completed HS	25%	19%
Job training after HS	4%	4%
Some college	25%	31%
Associate degree	7%	7%
College	16%	17%
Some graduate school	2%	2%
Graduate degree	12%	10%
Employment Status		
Employed full time	42%	41%
Employed part time	10%	10%
Self-employed	7%	8%
Not employed, looking for work	4%	4%
Not employed, not looking	1%	1%
Not employed, disability or illness	5%	3%
Retired	21%	21%
Student	3%	4%
Stay-at-home spouse or partner	7%	8%
Area		
Urban	32%	40%
Suburban	46%	43%
Rural	22%	18%