PULSE OF CONSUMERS AND PHYSICIANS: The 2019 Texas Medical Center Survey of the US and Texas

YEAR 5

November 2019
The Panel

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Founding Dean, College of Medicine
University of Houston

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The Nation’s Pulse: Year Five

- This year, we surveyed 2,750 participants
  - 2,000 consumers with oversampling permitting Texas comparison
  - 750 physicians: 375 generalists and 375 specialists

- Survey was completed June-July 2019

- Luminas, LLC used a standard online protocol

- * p<0.05 significant difference
  - with N=2,750, so “small” differences count
Consumers and physicians: Four Key Areas

- National issues
- Reducing the cost of health care
- Physician compensation and the health care workforce
- The 2020 election
Health care has ranked at the top of issues in the presidential campaign... Health care for all, or health care for me?

Pew Research Center 2019
Consumers and physicians rank health care for all as #1.
Health care for ALL is the most important issue to Democrats, and health care for ME to Republicans.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Party Affiliation</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health care for ALL</td>
<td>Democrat (D)</td>
<td>26.6</td>
</tr>
<tr>
<td>Health care for ME</td>
<td>Republican (R)</td>
<td>15.1</td>
</tr>
<tr>
<td>The environment</td>
<td>Democrat (D)</td>
<td>14.8</td>
</tr>
<tr>
<td>Investigating President Trump</td>
<td>Republican (R)</td>
<td>14.1</td>
</tr>
<tr>
<td>Impact of current economy on me</td>
<td>Democrat (D)</td>
<td>15.1</td>
</tr>
<tr>
<td>Impact of current economy on America</td>
<td>Republican (R)</td>
<td>19.8</td>
</tr>
<tr>
<td>Foreign interference in American elections</td>
<td>Democrat (D)</td>
<td>7.2</td>
</tr>
<tr>
<td>America’s place in international affairs</td>
<td>Republican (R)</td>
<td>5.6</td>
</tr>
</tbody>
</table>

BASE: ALL QUALIFIED RESPONDENTS (n=1500)

Q307. Imagine you have 100 votes to cast across the following issues. Where will you put them relative to what is important to you?
About 2/3 of physicians and consumers say that everyone will have health care coverage, but physicians say it will take longer. More Republicans say that we will never have health care for everyone, but still >50% say we will.
Consumers: Affordability for everyone is most important. Physicians: High quality health care

Most important characteristic of health system

- **Everyone can afford health care**: 28% (Consumer) vs. 28% (Physician)
- **Highest quality care**: 28% (Consumer) vs. 44% (Physician)
- **All Americans have health care coverage**: 22% (Consumer) vs. 19% (Physician)
- **No limitations on government health care spending**: 10% (Consumer) vs. 4% (Physician)
- **No medical errors**: 9% (Consumer) vs. 4% (Physician)

* BASE: ALL QUALIFIED RESPONDENTS (Physician (n=750); Consumer (n=1500))

Q505. Which of the following is the most important feature of your ideal health system?
REDUCING THE COST OF HEALTH CARE

1. Take better care of ourselves
   • 40% of life expectancy is human behavior
     McGinnis, Health Affairs

2. Voluntary payments to help others

3. Reducing unnecessary tests/procedures
   • Waste $200 bn per year on “overtreatment”
     Berwick, JAMA

4. Paying physicians a salary
Consumers and physicians agree that taking better care of themselves is the best way to reduce the cost of health care.

Reducing the Cost of Health care (% agree)

<table>
<thead>
<tr>
<th></th>
<th>Physician</th>
<th>Consumer</th>
</tr>
</thead>
<tbody>
<tr>
<td>People taking better care of their health</td>
<td>91%</td>
<td>94%</td>
</tr>
<tr>
<td>Reducing the price of Rx drugs</td>
<td>90%</td>
<td>93%</td>
</tr>
<tr>
<td>Requiring doctor’s offices/hospitals to function more efficiently</td>
<td>83%</td>
<td>75%</td>
</tr>
<tr>
<td>Allowing people to have online visits</td>
<td>77%</td>
<td>72%</td>
</tr>
<tr>
<td>All Americans having health insurance</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td>Patients requesting fewer drugs/tests/procedures</td>
<td>68%</td>
<td>70%</td>
</tr>
<tr>
<td>Doctors ordering fewer tests/Doing fewer procedures</td>
<td>55%</td>
<td>64%</td>
</tr>
<tr>
<td>Nothing can reduce the cost of healthcare in America</td>
<td>37%</td>
<td>29%</td>
</tr>
</tbody>
</table>

BASE: ALL QUALIFIED RESPONDENTS (Physician (n=750); Consumer (n=1500))
Q405P/Q235C How much do you agree or disagree that each of the following could play an important role in reducing the cost of healthcare in America?
About half of Americans, especially those with household incomes <$35K are willing to pay more for healthcare so that everyone in the country has insurance.

### Willingness to Pay More by Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Willingness to Pay More (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>51%</td>
</tr>
<tr>
<td>&lt;$35K</td>
<td>57%</td>
</tr>
<tr>
<td>$35K to &lt;$50K</td>
<td>47%</td>
</tr>
<tr>
<td>$50K to &lt;$75K</td>
<td>48%</td>
</tr>
<tr>
<td>$75K to &lt;$100K</td>
<td>49%</td>
</tr>
<tr>
<td>$100K+</td>
<td>52%</td>
</tr>
</tbody>
</table>

**BASE: ALL QUALIFIED RESPONDENTS (n=1500)**

Q203. On average Americans spend 11% of their annual salary on out-of-pocket healthcare costs (not including what their employer might pay). Based on your income, this means that you do/would pay roughly $(...) in out-of-pocket costs per year. How much more in out-of-pocket costs would you be willing to pay annually so that everyone in America has health insurance?
The percent of income that consumers are willing to pay increases with income.
“Small amounts” to support health care for others add up: $24.5 billion

Voluntary contributions

- <$35,000: $1.1 bn
- $35-50K: $1.1 bn
- $50-75K: $2.4 bn
- $75-100K: $2.7 bn
- $100,000+: $17.3 bn

BASE: ALL QUALIFIED RESPONDENTS (n=1500)

Q203. On average Americans spend 11% of their annual salary on out-of-pocket healthcare costs (not including what their employer might pay). Based on your income, this means that you do/would pay roughly $(...) in out-of-pocket costs per year. How much more in out-of-pocket costs would you be willing to pay annually so that everyone in America has health insurance?
7 in 10 physicians and consumers agree that physicians do excessive testing

Physicians
- 29% disagree
- 71% agree

Consumers
- 33% disagree
- 67% agree

Other physicians, not me, do excessive testing
Other people’s physicians, not mine, do excessive testing

BASE: ALL QUALIFIED RESPONDENTS (Physicians (n=750); Consumers (n=1500)
Q415. Please indicate whether you agree or disagree with the following statement.
The need to avoid malpractice lawsuits drives excessive testing more than making an accurate diagnosis; income a consideration for >50%.

### Drivers of Excessive Testing

<table>
<thead>
<tr>
<th>Reason</th>
<th>Generalist</th>
<th>Specialist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoid malpractice lawsuits</td>
<td>1% 31% 68%</td>
<td>4% 30% 66%</td>
</tr>
<tr>
<td>Do everything possible to make an accurate diagnosis</td>
<td>1% 43% 56%</td>
<td>2% 39% 59%</td>
</tr>
<tr>
<td>Patients insist on having more tests</td>
<td>3% 61% 36%</td>
<td>9% 63% 29%</td>
</tr>
<tr>
<td>Increase their income</td>
<td>43% 46% 11%</td>
<td>34% 53% 14%</td>
</tr>
</tbody>
</table>

* BASE: ALL QUALIFIED RESPONDENTS (Generalist (n=375); Specialist (n=375))
Q408. How much does each of the following impact why doctors might order tests that many consider excessive?
Physicians paid salary do 8% to 33% fewer tests and procedures than those paid fee-for service.

Therefore, paying physicians by salary could reduce costs by reducing tests and procedures.

Gosden, T. Cochrane Database Systematic Reviews
Both generalists and specialists want to be paid by salary.

**Ideal Payment Mechanism for Physicians**

Generalist:
- Salary with 0-25% bonus: 47%
- Fee-for-service: 32%
- Salary 26-50% bonus: 21%

Specialist:
- Salary with 0-25% bonus: 44%
- Fee-for-service: 32%
- Salary 26-50% bonus: 24%

68% CHOOSE SALARY
Of those physicians who selected salary as their ideal payment mechanism, they did so because they want certainty in knowing their salary.

**Reasons for Selecting Salary**

- **Certainty of knowing salary**
  - **Generalist**: 71%
  - **Specialist**: 74%

- **Will not have to work as many long hours**
  - **Generalist**: 18%
  - **Specialist**: 15%

- **Will make more money**
  - **Generalist**: 10%
  - **Specialist**: 12%

**BASE: SALARY AS IDEAL PAYMENT MECHANISM**

(Generalist (n=248); Specialist (n=255); Texas (n=58); National (n=475))

Q315: Please indicate the primary reason you selected salary (versus fee-for-service) as your ideal payment mechanism.
HEALTH CARE WORKFORCE

• AAMC: By 2032, shortage of 46,900-121,900 physicians (very broad range)
• Best to measure “shortage” by patient appointments
• But urban physician appointments are more due to insurance shortage than physician supply.  
  Grumbach, Health Affairs
Less than 1 in 5 have trouble scheduling an appointment. Urban residents have more trouble than rural. This is true for PCP and Specialists - both new and return.

**Had Trouble Scheduling PCP and Specialist Appointments in Past 12 Months? By Urban/Rural**

- **New patient visit with PCP**
  - TOTAL: 19%
  - URBAN: 32%
  - RURAL: 7%

- **New patient visit with specialist**
  - TOTAL: 15%
  - URBAN: 25%
  - RURAL: 7%

*BASE: ALL QUALIFIED RESPONDENTS (n=1500)*

Q120. In past 12 months, have you had trouble scheduling a ...?
Well over 50% of physicians predict shortages in 5 years of both primary care and specialists; more primary care shortages than specialists; much uncertainty.
WAYS TO DEAL WITH FUTURE POSSIBLE SHORTAGE

1. Add nurse practitioners
2. Postponing physician retirement
   • Retirement greatest effect on supply: if retire 2 years later, adds 85,000 to workforce by 2032
   
   AAMC Workforce Update

3. Service requirement in underserved areas
4. Education of future physicians
The role of the PCP in 5 years: Will see fewer patients, decrease in number with more Nurse Practitioners

See fewer patients as Nurse Practitioners see more patients

<table>
<thead>
<tr>
<th>Generalists</th>
<th>Specialists</th>
</tr>
</thead>
<tbody>
<tr>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>77%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Eventually decrease in number as NPs increase and patients take better care of themselves

<table>
<thead>
<tr>
<th>Generalists</th>
<th>Specialists</th>
</tr>
</thead>
<tbody>
<tr>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>59%</td>
<td>53%</td>
</tr>
</tbody>
</table>

**BASE: ALL QUALIFIED RESPONDENTS** (Generalist (n=375); Specialist (n=375))

Q420. How much do you agree or disagree with the following statements? In the next 5 years, primary care physicians will...?
6 in 10 consumers find NP acceptable instead of PCP and about half say NP acceptable instead of specialist.

<table>
<thead>
<tr>
<th></th>
<th>Initial visit to PCP</th>
<th>Follow-up visit to PCP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>32%</td>
<td>39%</td>
</tr>
<tr>
<td>Not acceptable</td>
<td>68%</td>
<td>61%</td>
</tr>
<tr>
<td>Acceptable or neutral</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Initial visit to Specialist</th>
<th>Follow-up visit to Specialist</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>51%</td>
<td>45%</td>
</tr>
<tr>
<td>Not acceptable</td>
<td>49%</td>
<td>55%</td>
</tr>
<tr>
<td>Acceptable or neutral</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**BASE:** ALL QUALIFIED RESPONDENTS (n=1500)

Q115: Please indicate how you would feel in the following situations.
Postponing physician retirement: About 4 in 5 might change their plans for retirement; Doubling time spent with patients could keep physicians from retiring.

**Change in the Practice of Medicine that Would Keep Physician from Retiring**

- **Doubling the amount of time available per patient, but keeping my income the same**
  - Generalist (G): 34%
  - Specialist (S): 30%
- **10% more income**
  - Generalist (G): 21%
  - Specialist (S): 20%
- **Smoother functioning electronic health records**
  - Generalist (G): 12%
  - Specialist (S): 16%
- **Universal access to healthcare for everyone**
  - Generalist (G): 8%
  - Specialist (S): 9%
- **Automated billing**
  - Generalist (G): 2%
  - Specialist (S): 5%
- **None of above - I would retire anyway**
  - Generalist (G): 24%
  - Specialist (S): 21%

**BASE: ALL QUALIFIED RESPONDENTS** (Generalist (n=375); Specialist (n=375))
Q260. If you were planning to retire in the next 5 years, what one change in the practice of medicine would keep you from retiring then?
Some enthusiasm for graduation requirement that med students serve two years in underserved area prior to residency:
Could add 40,000 physicians

Enthusiasm: Graduation Requirement That Med Students Serve Two Years in Underserved Area Prior to Residency

BASE: ALL QUALIFIED RESPONDENTS (Generalist (n=375); Specialist (n=375);
Q650: How enthusiastic would you be about a requirement that graduating medical students serve two years in an underserved area prior to residency?
More than 4 in 10 physicians say that the United States Medical Licensing Exam does NOT test what is necessary to be a practicing physician.

Perspective: Leveraging the Health Care Workforce: What Do We Need and What Educational System Will Get Us There?
Garson, Arthur Jr. MD, MPH
The 2020 Election

- How Republicans and Democrats deal with Medicaid differs.
- In July 2017, Sen John McCain cast the deciding vote defeating the American Health Care Act supported by President Trump.
- This would have taken Medicaid away from 14 million people and cut Medicaid expense by $834 billion.

About half of consumers and physicians would NOT vote for a candidate in their district who proposed reducing Medicaid.
More than 80% of President Trump’s base would like to see his health plan before the election.

I PLAN TO VOTE FOR PRESIDENT TRUMP
‘I would like to see President Trump’s proposal for healthcare change before the 2020 election’

- Consumers: 80% Agree
- Physicians: 88% Agree
16% of consumers and 23% of physicians from President Trump’s base would NOT vote for him if he proposed cutting Medicaid.

**I PLAN TO VOTE FOR PRESIDENT TRUMP**

*If President Trump proposed reducing Medicaid coverage for those who need it, I would NOT vote for him.*

- **Consumers**: 16% would not vote for him
- **Physicians**: 23% would not vote for him

*Caution: Small base*

**BASE: PLAN ON VOTING FOR PRESIDENT TRUMP IN 2020 ELECTION**

Q555. Please indicate how much you agree or disagree: If President Trump proposed reducing Medicaid coverage for those who need it, I would vote for President Trump.
### Demographics

<table>
<thead>
<tr>
<th></th>
<th>Total (750)</th>
<th>Generalists (375)</th>
<th>Specialists (375)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>67%</td>
<td>63%</td>
<td>68%</td>
</tr>
<tr>
<td>Female</td>
<td>33%</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
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<tr>
<td>Mean</td>
<td>49.6</td>
<td>49.7</td>
<td>49.5</td>
</tr>
<tr>
<td><strong>Years in Practice</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>19.7</td>
<td>19.9</td>
<td>19.6</td>
</tr>
<tr>
<td><strong>Primary Work Setting</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mostly office- or clinic-based</td>
<td>61%</td>
<td>79%</td>
<td>53%</td>
</tr>
<tr>
<td>Mostly or exclusively hospital-based</td>
<td>16%</td>
<td>9%</td>
<td>19%</td>
</tr>
<tr>
<td>Mostly long-term care facility-based</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Mostly hospice-based</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Equally hospital-based and office/clinic-based</td>
<td>16%</td>
<td>6%</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>
### Demographics (cont’d.)

<table>
<thead>
<tr>
<th>Size of Organization</th>
<th>Total</th>
<th>Generalists</th>
<th>Specialists</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>13%</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>2-10</td>
<td>28%</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>11-50</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>51-100</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>100+</td>
<td>28%</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Income</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Mean</td>
<td>$288,900</td>
<td>$276,500</td>
<td>$294,700</td>
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