

Voter Priorities for Election 2020

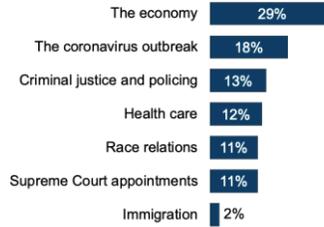
1

Ending COVID-19 and improving the economy are the top issues for voters, followed by criminal justice and policing, and health care.

 Kaiser Family Foundation

The Economy Is The Top Issue For Voters Heading Into 2020 Presidential Election

AMONG REGISTERED VOTERS: Percent who say each of the following issues will be the most important in deciding their vote for president:



SOURCE: KFF Health Tracking Poll (conducted October 7-12, 2020). See topline for full question wording.

 KFF

2

When it comes to health care, voters worry about their ability to afford and access care when they need it.

 POLITICO/Harvard

Table 9. Health Care Voters' Top Health Care Issues, Not Including COVID-19, in Deciding How to Vote for President, by Presidential Vote Preference

	Total health care voters	Trump health care voters	Biden health care voters
High healthcare costs	48	51	48
The problems of the nation's uninsured	21	15	23
Problems getting healthcare	13	15	13
High drug costs	8	9	6
Medicare	7	7	7
Other/None of these (vol)	3	3	2
Don't know/Refused	*	-	1

POLITICO/Harvard T.H. Chan School of Public Health, The 2020 Presidential Election: Trump vs. Biden Voters on the Most Important Issues in Deciding Their Vote Choice, August 25 – September 6, 2020. Base: Likely voters who said health care, not including COVID-19, was an extremely important issue in deciding how to vote for president in the 2020 election.

3

They want meaningful efforts to control costs without giving up choice and quality.

84% of voters support **reducing wasteful spending** in health care.

89% of voters support **providing consumers with information about costs in advance** so they can make better choices.

October 2020 Morning Consult Poll

73% of voters believe getting **the best quality treatment is more important than getting the lowest cost** for a treatment.

August 2020 Winston Group Poll

4

COVID-19 has made voters worry about the quality of their insurance coverage.

62% of voters are **worried about not having the coverage they need** in the event of a major medical event.

October 2020 Morning Consult Poll

40% of adults don't have **savings to cover a \$400 emergency response**.

 Federal Reserve

Voter Priorities for Election 2020

5

High deductibles contribute significantly to the unpredictability voters feel.

63% are worried about not being able to afford their out-of-pocket costs for hospital bills.

54% are worried about out-of-pocket costs related to prescription medicines.

October 2020 Morning Consult Poll

6

Voters think the health care system is unfair.

“It is unfair that working people work 40 hours and can barely make ends meet after paying insurance premiums, copays, deductibles, prescription costs, we have no \$ left to live.”

- REPUBLICAN IN FLORIDA

“The unfairness of people forced to pay more when they get sick, as if getting sick was a choice!”

- DEMOCRAT IN COLORADO

October 2020 Focus Group

7

Consumers are shouldering more of the cost, often when they are at their most vulnerable.

Even before the pandemic,

43.4% of U.S. adults

had out-of-pocket costs (not including premiums) that equaled 10% of their household income.

Commonwealth Fund

8

Voters want policymakers to deal with the real drivers of health care costs – hospital care and professional services – rather than simply shifting costs to consumers.

\$1 out of \$3 spent in health care goes to hospitals

The Brookings Institute

National Health-Care Expenditures, by Type of Expenditure



Source: CMS 2018; authors' calculations.

Note: Data are for 2018. Long-term, nursing, and home health care includes three categories as defined by the National Health Expenditure Accounts: other health, residential, and personal care; home health care; and nursing care facilities and continuing care retirement communities. Other health, residential, and personal care includes expenditures for residential care facilities, ambulance providers, medical care delivered in nontraditional settings (such as community centers, senior citizens' centers, schools, and military field stations), and expenditures for Home and Community-Based Waiver programs under Medicaid. Home health and nursing/retirement care includes freestanding facilities only. Additional services of this type provided in hospital-based facilities are counted as hospital care. Nursing/retirement care includes care provided in nursing care facilities, continuing care retirement communities, state and local government nursing facilities, and nursing facilities operated by the Department of Veterans Affairs. Medical equipment and products include durable medical equipment and other nondurable medical products.

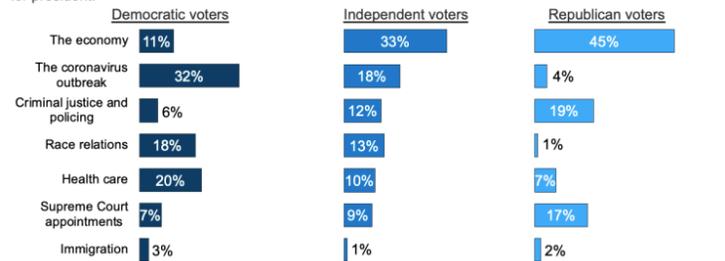
THE HAMILTON PROJECT
BROOKINGS

How COVID-19 is Influencing the Election

1 Democrats and Republicans prioritize key issues differently, but **COVID-19 and its economic impact** are top overall concerns.

About Half Of Republicans, One-Third Of Independents Say Economy Is Most Important Issue, More Democratic Voters Say Coronavirus

Percent who say each of the following is the **most important issue** in making their decision about who to vote for president:



SOURCE: KFF Health Tracking Poll (conducted October 7-12, 2020). See [topline](#) for full question wording.

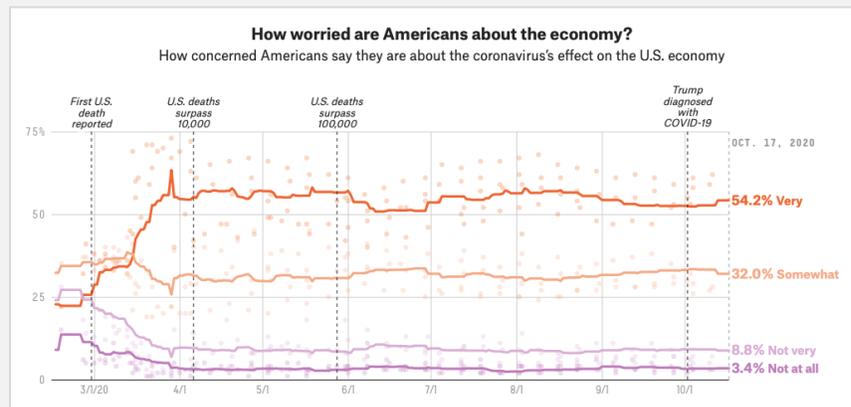
KFF

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2 Americans are concerned about **the virus's impact on the economy**.

86.2% somewhat or very worried

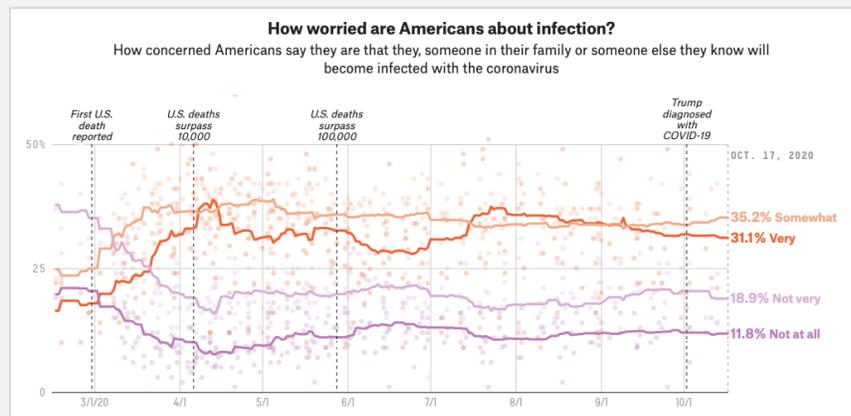
 FiveThirtyEight



3 Americans are concerned that **they, someone in their family or someone they know will be infected by COVID-19**.

66.3% somewhat or very worried

 FiveThirtyEight



4 Voters want **continued progress in the fight against COVID-19** and see the pharmaceutical industry as a key partner in defeating the disease.

77% believe **government should work more closely with the pharmaceutical industry** to develop treatments and a vaccine for the coronavirus.

78% think that a strong American **biopharmaceutical industry is a matter of national security** to protect us from future pandemics.

Voters' Personal Health and Cost Concerns

1

Across party lines, voters are increasingly concerned about pre-existing conditions.

79% do not want pre-existing protections overturned

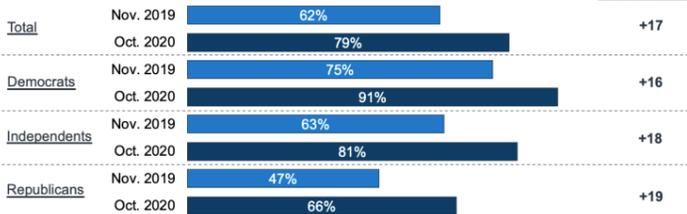
 Kaiser Family Foundation

Figure 2

Larger Shares Across Partisans Now Say They Do Not Want Pre-Existing Condition Protections Overturned

Percent who say they would **not** like to see the Supreme Court overturn protections for people with pre-existing conditions established by the Affordable Care Act:

Percentage point change from Nov. 2019 to Oct. 2020:



SOURCE: KFF Health Tracking Polls (conducted November 7-12, 2019 and October 7-12, 2020). See topline for full question wording.

KFF

2

Affordability of premiums and out-of-pocket costs are the dominant health care issues for voters.

44%

identified the **cost of health insurance premiums** as their top issue in health care.

38%

identified **out-of-pocket costs** not covered by insurance as their top issue in health care.

October 2020 Morning Consult Poll

3

Rising out-of-pocket costs create affordability challenges for Americans who continue to pay more for their health care each year.

68%

of voters say that **health coverage is getting more expensive and covering less.**

Nearly half

say they are **paying much more or somewhat more for their health expenses out-of-pocket** compared with four years ago.

October 2020 Morning Consult Poll

4

Voters want a system that is affordable but **don't want to make health care more political.**

74% of voters

agree that we **should not make health care more political** by allowing bureaucrats to pick and choose which medicines Americans should get through government price-setting schemes.

October 2020 Morning Consult Poll

How Do We Address the Real Cost Drivers in the Health Care System?

1 High deductibles haven't slowed health care spending, just shifted the cost to consumers.

Deductible spending for people with large employer coverage **increased 205% between 2007 and 2017**, ten times faster than inflation.

The amount commercial health plans require patients to pay annually for their brand medicines has **increased by 50% or more since 2015 for some conditions, like HIV.**

Patients taking brand multiple sclerosis medicines with deductibles or coinsurance **paid 32 times more out-of-pocket than those with fixed copays.**

2 Americans are paying more out of their pocket for health care as deductibles, co-payments and premiums increase each year.

Commercial premiums increased by 4% last year, faster than both the rate of wage growth and inflation. During this same time, **prices for brand medicines increased just 1.7%** after accounting for rebates and discounts, less than the rate of inflation for the third year in a row.

Rebates, discounts, and other price concessions totaled \$175 billion in 2019, **a 136% increase** from the \$74 billion in rebates, discounts and other price concessions recorded in 2012.

The number of adults with annual deductibles of \$1,000 or more has **doubled in the last decade.**

For enrollees in an employer-sponsored health plan with a general annual deductible, **the average deductible for single coverage is \$1,644** in 2020. The **average deductible in 2015 was \$1,318.**

Between 2012 and 2017, the **share of employer sponsored health plans requiring patients to meet a deductible** for prescription medicines increased from 23% to 52%.

Medicare Part D beneficiaries are increasingly subject to coinsurance, particularly when those drugs covered are on a plan's non-preferred or specialty drug tiers. Most Part D plan sponsors impose 33% coinsurance for medicines on their specialty tier and coinsurance for non-preferred tier medicines can be as high as 40 to 50%.

3 Inpatient and outpatient care are the most significant costs in the system – and they keep growing.

Roughly **one-third of all health care spending goes to hospital care and about one-quarter goes toward professional services** (i.e., physician and nonphysician services outside the hospital setting).

Spending on both **retail and non-retail prescription medicines represents just 14% of total health care spending** and is projected to remain a small and stable share of spending through the next decade.

Total spending growth for **other health care services is projected to be more than 6 times that of prescription medicines** through the next decade.

How Do We Address the Real Waste in the Health Care System?

4 The sickest patients are shouldering higher out-of-pocket costs to keep premiums down.

While 90% of patients pay less than \$500 out-of-pocket per year on their medicines, total [out-of-pocket spending is heavily concentrated among a small share of patients](#) who fill prescriptions in the deductible phase or are required to pay coinsurance.

[IQVIA data](#) show that [health plans have been exposing chronically ill patients to increasingly higher cost sharing for brand medicines](#).

For example, between 2015 and 2019, the amount patients were required to pay [increased by 32% for brand depression medicines, 50% for brand HIV medicines and 56% for brand anticoagulants at the pharmacy counter](#). In contrast, [average net prices for brand medicines grew by less than 3% annually](#) over that same time, in line with inflation.

In 2016, the [top 5% of spenders accounted for half of health care spending](#), spending about \$50,000 annually, according to [The Commonwealth Fund](#).

5 Voters don't support having the sick pay more to keep costs down.

Nearly 7 in 10 [oppose making sick people pay for a larger portion of their care](#).

Almost two-thirds of the public think it is very important to keep in place current requirements that [prohibit insurers from charging sick people more in premiums](#). (*October 2020 Morning Consult Poll*)

6 Addressing waste in the system is a better way to lower spending without sacrificing quality.

A 2019 [JAMA study](#) found the estimated cost of [waste in the U.S. health care system ranged from \\$760 billion to \\$935 billion](#), accounting for approximately 25% of total health care spending.

For [hospital and physician prices](#), most of the growth in total price of care from 2007 – 2014 was driven by facility fees, which are higher rates meant to account for hospitals' overhead. These fees create [incentives to treat patients in more expensive settings, driving up patient and total system costs](#) and resulting in consolidation of providers, limiting competition in the health care market.

Solutions to Control Costs, Preserve Choice and Continue Innovation

1 Voters want policies that will ensure that there is some fairness in access to health care that protects the sick and the vulnerable – without destroying what they already have.

69% of voters oppose making sick people pay for a larger portion of their care. *(October 2020 Morning Consult Poll)*

The current reality is that [out-of-pocket spending is heavily concentrated](#) among a small share of patients who fill prescriptions in the deductible phase or are required to pay coinsurance.

The sickest Americans are increasingly [shouldering a greater percentage of health care costs](#). On average, high need patients (those with three or more chronic diseases) pay more than twice as much out-of-pocket compared to patients without chronic conditions.

2 Voters want meaningful efforts to control costs without giving up choice.

84% of voters support reducing wasteful spending in health care.

83% of voters support caps on the amount insurers can make patients pay out-of-pocket on deductibles, copays and other costs. *(October 2020 Morning Consult Poll)*

[Other proposals with strong public support](#) offer additional solutions to reduce cost burdens on patients and the system including requiring insurers to pass through the rebates and discounts on prescription medicines they negotiate with pharmaceutical manufacturers to patients at the pharmacy counter.

3 Voters are looking for increased transparency and predictability with what they have to pay out-of-pocket.

89% of voters support providing consumers with information about the costs of procedures in advance so they can make better choices.

86% of voters want more predictability in how much they will pay for things like prescription medicines every month, instead of having costs fluctuate each month.

87% of voters want to ensure that insurance coverage applies when you need it versus paying hundreds or thousands of a deductible first before coverage kicks in. *(October 2020 Morning Consult Poll)*

Solutions to Control Costs, Preserve Choice and Continue Innovation

4 Voters also value quality, even more so than cost if comparing the two.

73% of voters believe getting the best quality treatment is more important than getting the lowest cost for a treatment; this number jumps to 92% for Americans aged 65+. *(August 2020 Winston Group Poll)*

5 Voters want access to quality care.

More than nine in 10 Americans (94%) say [that protecting pre-existing conditions is an important factor in their decision to vote](#) – demonstrating a desire to support access to care.

6 Voters believe biopharmaceutical innovation is critical, especially in the face of a global pandemic.

78% of voters agree that keeping a strong American biopharmaceutical industry is a matter of national security to protect us against the next pandemic. *(October 2020 Morning Consult Poll)*

The United States is the global leader in biopharmaceutical innovation. American companies are [spearheading the search for treatments and vaccines for COVID-19](#) because of our unique research ecosystem that fosters and supports medical innovation.

Opinion Research Citations

[KFF Health Tracking Poll](#), *October 2020*

The KFF Health Tracking Poll was designed and analyzed by public opinion researchers at the Kaiser Family Foundation (KFF). The survey was conducted October 7- 12, 2020, among a nationally representative random digit dial telephone sample of 1,207 adults ages 18 and older, living in the United States, including Alaska and Hawaii

[Harvard and T.H. Chan School of Public Health](#), *September 2020*

The results are based on polling conducted by Politico and Harvard T.H. Chan School of Public Health. Representatives of the two organizations worked closely to develop the survey questionnaires and analyze the results of the polls.

Interviews were conducted with a nationally representative sample of 1,459 randomly selected likely voters via telephone (including cell phones and landlines) by SSRS of Glen Mills, Pennsylvania. The interviewing period was August 25 – September 6, 2020.

[Morning Consult](#), *October 2020*

The Morning Consult National Tracking Poll was conducted October 9 – 11, 2020 among 2,000 likely voters.