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# Positioning Tax-Paying Hospitals for Effective Advocacy in 2024

Key insights and implications from LSG's national health care polling

February 2024







Public Opinion

# Political & Policy Landscape

# Top 2024 issues: inflation, economy, and immigration

	U.S.	DEM	SWING	GOP
<b>Inflation and rising cost of living</b>	<b>53%</b>	<b>44%</b>	<b>58%</b>	<b>62%</b>
<b>The economy</b>	<b>42%</b>	<b>32%</b>	<b>45%</b>	<b>53%</b>
<b>Immigration</b>	<b>31%</b>	<b>13%</b>	<b>30%</b>	<b>53%</b>
Health care	23%	29%	24%	15%
Crime and public safety	22%	16%	24%	27%
Gun policy	21%	<b>36%</b>	17%	5%
National security/foreign policy	19%	11%	22%	27%
The environment	16%	25%	15%	6%
Abortion	14%	22%	9%	7%
Income and wealth inequality	14%	21%	13%	6%
Taxes	14%	10%	13%	19%
Education	10%	11%	10%	7%
Social justice	8%	14%	5%	3%
Energy	6%	6%	7%	5%
Financial regulation	5%	5%	5%	3%
Judges and the judiciary	4%	5%	4%	2%

+10% 

-12% 



# What we hear in our focus groups

1. Inflation and the rising **COST of living** are making it harder to get by.
2. I don't trust anything **BIG**. Trust in large institutions is at a record low – with big business and Congress among the lowest.
3. Despite more division than ever, there is a desire to see lawmakers work **TOGETHER** and get things done.



# Voters are **SPLIT** on the 2024 generic congressional ballot, but Republicans hold an edge among swing voters

If the 2024 congressional elections were following types of candidates would you be more likely held today, which of the to vote for?

	U.S.	DEM	SWING	GOP
Republican candidate	<b>45%</b>	2%	<b>41%</b>	96%
Democratic candidate	<b>42%</b>	87%	<b>31%</b>	1%
Independent/third party candidate	10%	6%	24%	2%
Someone else	2%	3%	3%	0%
Wouldn't vote	1%	1%	1%	0%



# Biden and Trump are in a dead heat early in the 2024 presidential election

If the 2024 presidential election were held today and the candidates were as below, for whom would you vote?

	U.S.	DEM	SWING	GOP
Republican Donald Trump	<b>42%</b>	4%	<b>36%</b>	89%
Democrat Joe Biden	<b>39%</b>	79%	<b>32%</b>	1%
Someone else	8%	15%	30%	9%
Wouldn't vote	1%	2%	2%	1%



# What to look for ahead of the 2024 elections

1. Polls of **likely voters conducted online** – not of registered voters or conducted by phone
2. Results among **key demographics** (swing voters, seniors, women, and minorities)
3. Trends and who has the most **momentum** as we get closer
4. The **economy, Biden's age, and candidate messaging/rhetoric**





Public Opinion

# Attitudes Toward Hospitals & Health Care



# Lowering costs remains voters' TOP health care priority

Which of the following is the MOST important priority to improve the U.S. health care system? (COMBINED – TOP TWO)

	U.S.	DEM	SWING	GOP
<b>Bring down health care costs</b>	<b>72%</b>	<b>71%</b>	<b>71%</b>	<b>73%</b>
Improve the quality of health care	34%	34%	34%	33%
Expand coverage to the uninsured	31%	42%	26%	20%
Make health care simpler	29%	28%	32%	30%
Give consumers more choice and control	23%	15%	24%	31%
Drive medical innovation and breakthroughs	12%	10%	14%	13%



# Likely voters blame pharmaceutical companies and health insurance companies MOST for rising health care costs

Who or what do you blame MOST for rising health care costs? (COMBINED CHOICE – TOP THREE)

	U.S.	DEM	SWING	GOP
<b>Pharmaceutical companies</b>	<b>51%</b>	<b>56%</b>	<b>52%</b>	<b>45%</b>
<b>Health insurance companies</b>	<b>50%</b>	<b>58%</b>	<b>48%</b>	<b>42%</b>
Inflation and supply chain issues	45%	38%	<b>51%</b>	47%
The federal government	43%	31%	38%	<b>59%</b>
State governments	21%	22%	14%	26%
Private equity firms	19%	26%	21%	10%
<b>Hospitals</b>	<b>18%</b>	<b>19%</b>	<b>17%</b>	<b>13%</b>
Pharmacy benefit managers (PBMs)	17%	19%	17%	13%
Government insurance programs like Medicare and Medicaid	15%	10%	17%	18%
Doctors	12%	14%	12%	10%
Health care workers unions	10%	7%	10%	14%



# Health insurance companies are blamed MOST for the lack of transparency on prices

Who do you blame MOST for a lack of clear information on health care prices? (COMBINED CHOICE -- TOP TWO)

	U.S.	DEM	SWING	GOP
<b>Health insurance companies</b>	<b>49%</b>	<b>54%</b>	<b>47%</b>	<b>45%</b>
The federal government	37%	27%	33%	51%
Pharmaceutical companies	35%	37%	36%	31%
State governments	22%	21%	19%	25%
<b>Hospitals</b>	<b>20%</b>	<b>20%</b>	<b>22%</b>	<b>17%</b>
Pharmacy benefit managers (PBMs)	15%	15%	17%	13%
Doctors and care providers	12%	14%	14%	9%
Private equity firms	11%	12%	11%	9%



# Hospital favorability is among the HIGHEST in the health care sector

How favorable or unfavorable is your opinion of each of the following? (FAVORABLE)

	U.S	DEM	SWING	GOP
Nurses	88%	87%	86%	90%
Doctors	80%	82%	80%	79%
<b>Hospitals</b>	<b>72%</b>	<b>72%</b>	<b>72%</b>	<b>71%</b>
Medicare	71%	75%	70%	67%
Medicaid	57%	69%	54%	46%
<b>Medicare Advantage plans</b>	<b>55%</b>	<b>59%</b>	<b>54%</b>	<b>52%</b>
Affordable Care Act (ACA)	54%	79%	52%	27%
<b>Health insurance companies</b>	<b>50%</b>	<b>46%</b>	<b>51%</b>	<b>53%</b>
<b>Pharmaceutical companies</b>	<b>42%</b>	<b>40%</b>	<b>42%</b>	<b>44%</b>
<b>Pharmacy benefit managers (PBMs)</b>	<b>32%</b>	<b>35%</b>	<b>30%</b>	<b>32%</b>



# Most believe it's IMPORTANT that there is adequate government funding to ensure hospitals in underserved communities stay open

How important or unimportant do you believe it is for the federal government to provide adequate funding to ensure hospitals serving rural, low-income, minority, and other underserved communities remain open and are not at risk of closure?

	U.S.	DEM	SWING	GOP
<b>IMPORTANT (NET)</b>	<b>82%</b>	<b>89%</b>	<b>82%</b>	<b>74%</b>
NEITHER / I DON'T KNOW	10%	6%	11%	15%
<b>UNIMPORTANT (NET)</b>	<b>8%</b>	<b>6%</b>	<b>7%</b>	<b>10%</b>



# Most would be LESS likely to vote for their member of Congress if they cut funding for hospitals & threatened their ability to stay open

If your member of Congress supported policies that cut funding for local hospitals and threatened their ability to stay open, would you be more or less likely to vote for them in the next election?

	U.S.	DEM	SWING	GOP
MORE LIKELY (NET)	23%	20%	29%	21%
NO IMPACT	6%	4%	4%	11%
<b>LESS LIKELY (NET)</b>	<b>70%</b>	<b>76%</b>	<b>67%</b>	<b>68%</b>



# A majority **SUPPORT** hospitals being able to consolidate into larger health systems

In recent years, hospitals, clinics, and doctor's offices have been consolidating into larger health systems to become more efficient, coordinate care, prevent hospital closures, and ensure access to care for patients. Do you support or oppose hospitals, clinics, and doctor's offices being able to consolidate?

	U.S.	DEM	SWING	GOP
<b>SUPPORT (NET)</b>	<b>60%</b>	<b>60%</b>	<b>62%</b>	<b>57%</b>
NEITHER / I DON'T KNOW	26%	27%	24%	26%
<b>OPPOSE (NET)</b>	<b>14%</b>	<b>13%</b>	<b>14%</b>	<b>16%</b>



# Most believe hospitals that operate as part of a larger or regional network generally deliver HIGHER quality care

Which of the following types of hospitals do you believe would generally deliver higher quality care if you needed treatment in a hospital?

	U.S.	DEM	SWING	GOP
<b>A hospital that operates as part of a larger or regional network of many hospitals and care facilities</b>	<b>64%</b>	<b>66%</b>	<b>61%</b>	<b>63%</b>
A freestanding hospital that operates on its own and is not part of a larger or regional network of other hospitals and care facilities	36%	34%	39%	37%





# A plurality **SUPPORT** the federal government providing higher reimbursement rates for services provided at hospitals

Do you support or oppose the federal government providing higher reimbursement rates for services provided at hospitals than less comprehensive health care facilities like doctor's offices?

	U.S.	DEM	SWING	GOP
<b>SUPPORT (NET)</b>	<b>45%</b>	<b>45%</b>	<b>50%</b>	<b>42%</b>
NEITHER / I DON'T KNOW	33%	37%	30%	34%
OPPOSE (NET)	21%	18%	20%	25%

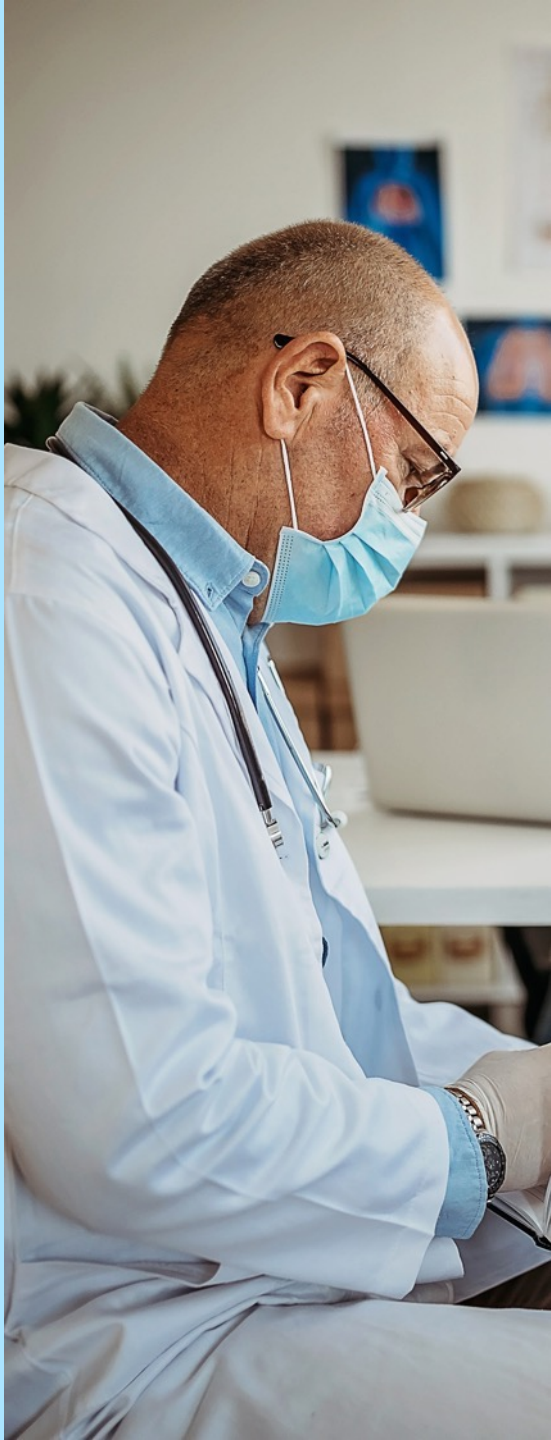


# Most are CONCERNED about Medicare Advantage plan care denials, care delays, limited networks, and marketing tactics

How concerned or unconcerned are you about the following practices of Medicare Advantage plans? (CONCERNED)

	U.S.
Denying payments for medically necessary treatments or services	83%
Delaying patients' access to medical treatments or services by requiring prior authorization	80%
Limiting patients' choice of in-network doctors and hospitals	80%
Using supplemental benefits to attract seniors to plans that may not meet their full needs	75%





Message Testing

# Hospital Messaging for 2024

# Exposure to sector messaging can IMPROVE perceptions of hospitals and DECREASE support for site neutral payments

MORE PART OF THE SOLUTION	PRE-TEST	POST-TEST	PERCEPTION CHANGE
U.S. likely voters	39%	63%	<b>+24%</b>
Democratic likely voters	41%	67%	<b>+26%</b>
Swing likely voters	42%	62%	<b>+20%</b>
Republican likely voters	34%	57%	<b>+23%</b>

SITE NEUTRAL SUPPORT	PRE-TEST	POST-TEST	PERCEPTION CHANGE
U.S. likely voters	34%	24%	<b>-10%</b>
Democratic likely voters	34%	25%	<b>-9%</b>
Swing likely voters	34%	27%	<b>-7%</b>
Republican likely voters	32%	21%	<b>-11%</b>



# Hospital Value Messages for 2024

## Say This...



**Care for everyone:** They provide lifesaving care to anyone who walks in their door, regardless of whether they have insurance coverage or are able to pay.



**Always open 24/7:** They are open 24/7, 365 days a year, so that all patients can receive the care they need when they need it unlike other care providers.



**Medical research:** They fund, test, and use clinical trial research, data, and best practices to generate better outcomes for patients.



**Advanced, specialized care:** They provide advanced, specialized care for the sickest patients and those with the most complex chronic conditions.

## Instead of That...



**Jobs and economic growth:** They are among the largest employers in their communities providing high-quality, good-paying jobs and generating significant economic growth and tax revenue.



**Address social determinants of health:** They partner with local community organizations and non-profits to proactively address the social and financial conditions that impact health like food insecurity, early childhood development, and housing, among others.

# Site Neutrality Messages for 2024

## Say This...



**Threatens quality:** Cutting payments to hospitals and health systems threatens their ability to acquire the most cutting-edge technology and provide the most integrated, coordinated care.



**Increases costs for patients:** Cutting payments to hospitals and health systems would force them to pass on some of these costs to patients with private insurance, which would increase costs.



**Threatens access:** Cutting payments to hospitals and health systems threatens their ability to keep their doors open, especially in rural and underserved communities, and offer certain services for patients, like maternity and pediatric care.

## Instead of That...



**Unique patient population:** Hospitals and health systems should be paid more than less comprehensive care facilities as they disproportionately treat the most medically at-risk populations, like the disabled, racial and ethnic minorities, and those with major medical complications or comorbidities.

# Key Takeaways

- 1 Most have a **FAVORABLE** view of hospitals, and exposure to industry messaging can **IMPROVE** perceptions of hospitals and **DECREASE** support for site neutral payments in 2024.
- 2 Voters blame **pharmaceutical and insurance companies** most on rising costs and are **CONCERNED** about insurers role in providing coverage to seniors with Medicare Advantage plans.
- 3 A majority of voters **OPPOSE** the federal government cutting funding for hospitals and are very **CONCERNED** about any policies that could impact access to care.
- 4 A majority support hospitals being able to **CONSOLIDATE**, and most believe hospitals who are part of a larger or regional network generally deliver **HIGHER** quality care.
- 5 Top hospital value messages in 2024: **care for everyone, always open 24/7, medical research, and advanced, specialized care.**





# Thank You

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