



**San Francisco Bay Area
Poll Report**

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The Bottom Line

Bay Area residents express concern about the cost and availability of quality health care in the region, with more than seven out of 10 rating the affordability of care as only fair or poor and nearly half (49%) saying that access to care for the uninsured in the area is poor. In contrast, 80% say they are pleased with the quality of care they personally receive.

Those surveyed are also paying attention to the candidates' positions on health care and overwhelmingly say that the candidates priorities on this issue should be controlling the rising cost of health care (86%), providing health insurance for all children (83%), and improving the quality and safety of medical care (79%). They also want straight answers from the candidates as far as how much their reforms would be paid for and how much they would cost individual taxpayers.

A Tale of Two Systems: Ours and Mine

Bay Area residents are generally negative in their assessment of the affordability of health care in the region as well as access to care for the uninsured. They tell a tale of two systems with most providing a negative assessment of quality of care in the region in contrast to a more positive assessment of the personal care they receive. Not surprisingly, geographic location within the Bay Area plays a role in residents' assessments, with notable differences surfacing between counties.

- **Three out of four area residents say that access to care for the uninsured is fair (26%) or poor (49%).** Only 3% say it is excellent.
- **Seven in 10 say the affordability of healthcare is just fair (27%) or poor (46%).** Just 6% say it is excellent.
 - San Francisco residents have the poorest perceptions of affordability (52% poor, compared to 42% in Santa Clara).
- **Four in ten say the availability of quality health care in their area is fair (23%) or poor (17%).** Only 19% give it an excellent rating.
 - Santa Clara County residents are most pleased with the availability of quality health care (26% excellent, compared to only 10% excellent in Alameda and 16% in San Francisco).
- However, when residents were asked to rate the care they personally received, **eight out of 10 rated it as excellent (37%) or good (43%)** compared to just one in five who rate their care as fair (15%) or poor (5%).
 - Contra Costa and Marin County residents are most pleased with their personal quality of care (46% excellent, compared to 30% excellent in Alameda and 33% excellent in San Francisco).

Cost and Quality Top List of Concerns for Area

Cost and quality are nearly tied as healthcare concerns of San Francisco area residents.

- Four in 10 say that cost is their biggest health care concern (40%), followed by 35% who say quality is their top concern. Just 14% cite access to care as their top concern.
 - Cost is the top concern in all counties in the region except for Alameda, where they are marginally more concerned about quality (38%) than cost (33%). Cost is of greatest concern in San Mateo (49%).
 - Young adults under the age of 40 are roughly equally concerned about both cost (39%) and quality (36%). Seniors ages 65+, however, are much more concerned about quality (50%) than cost (32%), as are those ages 40 to 64.

Bay Area Snapshot: Coverage

Approximately 9% of those polled report that they are currently uninsured, with cost being the most commonly mentioned barrier to coverage (35%). Another 29% report that their main reason for not having health insurance coverage is because their employer does not offer it. In addition, 18% of Bay Area residents have put off medical treatment in the last 12 months because of their inability to pay for it.

- Residents of Santa Clara (18%) and San Francisco (12%) are more likely to be uninsured than those in other Bay Area counties.
- Young area residents under the age of 40 report that they are uninsured at a rate of 14%, compared to 7% of 40-64 year olds and just 1% of those 65 and above.

Among those who have health insurance, most are covered by an employer-based plan (71%), with an additional 27% having Medicare coverage, 11% with Medicaid coverage, 8% military or veterans coverage, and 25% having some form of private insurance.

- Among those with employer based plans, 79% have a choice of plans while 21% are only given one option for their coverage
- More than one-third (36%) indicate that they are restricted to a list of doctors they can see, whereas 64% indicate they can choose any doctor if they are willing to pay more.
- 56% are required to get a referral before seeing a specialist, and 52% are required to sign up with a specific primary care doctor who provides their routine care.

Bay Area Snapshot: Satisfaction

Fully 69% of Greater San Francisco area residents are satisfied with their health insurance plans (32% are extremely satisfied).

- Seniors tend to be more satisfied (82%) than those ages 40-64 (64%) and those under 40 (67%).

There are four aspects of their health insurance coverage that San Francisco area residents tend to be most satisfied with:

- **Quality:** Overall quality of care they receive (80% satisfied)
- **Choice:** Choice of doctors and hospitals (75% satisfied)
- **Coordination:** Coordination of care by their primary care physician (72% satisfied)
- **Coverage:** Providing coverage for the services you need (72% satisfied)

Residents are least satisfied with:

- **Cost:** Out-of-pocket costs they pay (52% satisfied)
- **Information:** Ease of understanding the features of their health plan (63% satisfied)

Cost remains a major driver of overall satisfaction with the healthcare plan. Among those who are satisfied with their healthcare plan, 69% are satisfied with their costs. Yet among those who are dissatisfied, only 7% are satisfied with their costs.

- Bay Area residents are twice as likely to be satisfied with their personal health care costs (47%) as they are to be dissatisfied (25%), with 28% feeling neutral about their costs.
 - Those living in Contra Costa/Marin and San Francisco counties are less likely to be satisfied with their personal health care costs (41% and 40% respectively) than those in Santa Clara county (51%).
 - Examining intensity of opinion, young area residents under 40 are least likely to be extremely satisfied (17%), compared to seniors 65+ (38% extremely satisfied).

Health Care is Hot on the Campaign Trail

Roughly half of Greater San Francisco area residents (51%) are paying attention to candidates' positions on health care in the 2008 elections, with 29% saying they are paying very close attention.

- San Francisco (34% very close attention) and Alameda (33%) are paying closest attention, compared to just 22% who are paying very close attention in Contra Costa and Marin counties.

While much has been made of the youth movement during this election cycle, as far as health care goes, **Bay Area Seniors continue to lead the way with 36% paying very close attention compared to 32% of those 40-64 and 28% of those under 40.**

Those in the Bay Area also believe that controlling rising health care costs (86%) and providing health insurance for all children (83%) should be the top health care priorities for the candidates.

- Priorities are essentially the same across all three counties in the region and for all age groups, with a few exceptions:
 - San Francisco residents are more concerned with providing access to non-US citizens (55%) than those elsewhere in the region, especially Santa Clara (34%) and San Mateo (37%).
 - San Mateo residents are much more likely to say it should be a major priority of candidates to help Americans adopt healthier lifestyles (85%) than elsewhere in the region, particularly Santa Clara (63%) and Contra Costa/Marin (64%).

Healthcare Priorities for the Greater San Francisco Area			
	A major priority	A minor priority	Not a priority at all
Controlling rising health care costs	86%	9%	5%
Providing health insurance for all children	83%	13%	5%
Improving the quality and safety of medical care	79%	17%	4%
Allowing Americans to take their health care with them when they leave a job	77%	19%	4%
Providing health insurance for all uninsured Americans	75%	18%	7%
Stronger Federal regulation of the insurance industry	71%	24%	5%
Helping Americans to adopt healthier lifestyles	71%	23%	6%
Improving prescription drug coverage	68%	28%	4%
Restricting advertising for prescription drugs	43%	45%	12%
Access to health care for non-US citizens	42%	39%	19%

Not only are area residents clear on what the top health care priorities for the candidates should be, they also want to know more about how much planned reforms would cost individual taxpayers and how candidates would pay for their plans.

What do Voters Need to Know When Understanding Candidates Positions on Healthcare?			
	Critical information	Helpful but not critical	Not helpful
How much the plan will cost individual taxpayers	68%	28%	4%
How they would pay for their plan	67%	30%	3%
How their plan would improve the quality of health care	57%	39%	4%
How the plan will help cover the uninsured	54%	41%	6%

Ready for Reform, but Reluctant to Change

Concern over rising costs, along with heightened interest in candidate's plans for reform seem to indicate that the region is ready for change. However, when asked to pick between the status quo and specific reform proposals, most area residents favor of maintaining the current system.

60% prefer that employers provide health insurance for their employees as they do now rather than give employees the money they spend on health insurance so employees could buy their own private or government insurance (34%).

- San Francisco residents were more likely to support giving the money directly to employees (43%) than those in San Mateo (29%).

51% would rather see government provide tax credits for employers to provide health insurance to their employees, as it is now rather than eliminate tax credits for employers and provide the tax credits directly to consumers (40%).

- San Mateo residents were most supportive of providing tax credits directly to consumers to get more competitive rates (51%) than were other residents of the region.

When presented with the option to cover all children leaving some adults uninsured, nearly half (48%) felt it was more important to cover the uninsured even if it meant that everyone would be required to buy health insurance, rather than only guaranteeing coverage for children (32%). An additional 15% wanted no requirements about who must have health insurance.

- Those in Contra Costa/Marin (21%) and San Mateo (22%) were twice as supportive of having no requirements (leaving some uninsured) than were those in San Francisco (10%).

Cover the Uninsured, But Split Over How

Bay Area residents are evenly split on their willingness to pay more in taxes to cover the uninsured. Half say no (49%) and half (51%) say yes, including 34% who would be willing to pay up to 5% more in taxes. 11% would pay up to 10% more, and 6% would pay more than that.

- Contra Costa/Marin county residents are least willing to pay anything more in taxes to cover the uninsured (57%), whereas San Francisco residents are most likely to be willing to pay something extra.
- There are generational differences on willingness to pay, with those ages 65+ much more likely to say they would not pay anything extra at all (60%) than those under 40 (41%) or those 40-64 (49%).

The Importance of Information: What the Bay Area Wants to Know

More than half of San Francisco area residents sought out some type of information to learn more about their health care in the past 12 months.

- More than eight in 10 were looking for information about what is covered and not covered under their plan (83%).
- Nearly the same amount were seeking information how to prevent illness by adopting healthier lifestyles (78%).
- As many were seeking information about the costs they are responsible for paying (77%) or the cost of prescription drugs (75%).
- Surprisingly, just 53% were looking for information about the quality or performance ratings of doctors and hospitals covered under the plan.

When asked about specific types of information they have sought, nearly all find the following types of information to be **understandable and useful**, rather than complex and confusing.

- **Healthy lifestyles:** Information about how to prevent illness and adopt healthier lifestyles (96% understandable and useful)
- **Quality ratings:** Information about the quality and performance of the doctors and hospitals covered under the plan (94% understandable and useful)
- **Prescription drug costs:** Information about the cost of prescription drugs (89% understandable and useful)

They are relatively more likely to say the following types of information are complex and confusing:

- **Out-of-pocket costs:** Information you have about all of the costs you are responsible for paying (17% complex and confusing).
 - Young people are particularly likely to find this information to be confusing (23% vs. just 9% of seniors).
- **Coverage features:** Information you have about what is covered and what is not covered under your health plan (20% complex and confusing).
 - Santa Clara County residents are much more apt to find this information to be complex and confusing (28%).

Electronic Health Records a Pathway to Better Information

More than half of Greater San Francisco area residents have heard of electronic health records (55%), and 37% are currently using them. Awareness increases with age, income and education.

- Awareness is highest in the 40-64 year old range (70%).
- San Mateo residents are most likely to be aware of them (72%), compared to just 49% of those in Contra Costa and Marin counties. But usage is highest in Santa Clara county (45%), compared to San Mateo (32%).
- Awareness is highest for those in \$75K plus income bracket (70%), compared to those with incomes of \$35K or less (29%).

Among those who know of but do not use electronic health records, 39% indicate that they are likely to use such a system if it were available to them. Only slightly less (30%) say they are not likely to use electronic health records if available.

- San Mateo residents express the greatest willingness to use the health records (53% likely), compared to just 33% of non-users in Contra Costa/Marin counties.
- Seniors ages 65+ are less apt to want to use electronic health records (27%) than are those under 40 (37%) and those ages 40-64 (47%).
- Those on Medicare show the greatest resistance to electronic records with 32% saying that they are not likely at all to use such a system if available.
- Those who are satisfied with their health care overall, are more likely to use such a system (42%) than those who are not satisfied (30%).

Regardless of whether or not residents are using electronic health record systems, over half quickly realize the benefits. This is true across the region and across age categories.

- Six in 10 (60%) agree or strongly agree that electronic health records would improve the quality of their care.
- An equal number (59%) realize they will help people manage their own health care better.
- Nearly as many (52%) agree that electronic health record systems will reduce the cost of their health care.

Sharing of Medical Information is Strongly Supported

Three out of four residents of the Greater San Francisco area (74%) favor the idea of giving doctors the ability to share access to their medical records, if it is done with their permission, with 52% saying they strongly support the idea.

Support is almost as strong for having consumer health information being in a large database to help researchers understand and compare the effectiveness and possible side effects of various treatments or prescription drugs. If no patient names were used in the database, 65% favor such an idea (45% strongly favor). Young residents under 40 tend to support the idea (73%) more than senior citizens (56%).

Bay Area Snapshot: Choosing a Health Plan

When asked to rate the importance of nine different considerations if they were choosing a new health plan, majorities indicated that all of the factors were major considerations for them. Relatively speaking, the top considerations were:

- **Cost:** The total cost you would pay for the health coverage (81% major consideration)
- **Coverage:** The benefits cover the services you need (81%)
- **Choice:** The selection of doctors and hospitals covered under the plan (74%)
- **Prescription drugs:** Offering low cost prescription drugs (69%)
- **Quality:** Providing quality and performance ratings of the doctors and hospitals it covers (61% major consideration)
- **Access:** Being able to see a specialist without having to get a referral (63% major consideration)
- **Paperwork:** Having simple paperwork (65%)

Only slightly less important were the following:

- **Coordination:** Having a primary care physician who coordinates all of your care (54%)
- **Promoting health:** Providing incentives for those who live a healthy lifestyle (48%)

While priorities were essentially the same across age groups, choice of doctors covered under the plan is more important for those ages 40-64 (81%) than those under 40 (68%) or over 64 (69%).

Those in Contra Costa/Marin counties were most apt to say that a major consideration would be providing incentives for those who live a healthy lifestyle (57%).

Considerations When Choosing New Healthcare Plan

	Percent saying a major consideration
The benefits/covering the services you need	81%
The total cost you would pay for coverage	81%
The selection of doctors/hospitals covered	74%
Offering low-cost prescription drugs	69%
Having simple paperwork	65%
Being able to see a specialist without a referral	63%
Providing quality and performance ratings	61%
Having a primary care physician to coordinate care	54%
Providing incentives for healthy lifestyles	48%

Tradeoffs: In Selecting a Health Plan, Cost Trumps Choice and Coverage Trumps Cost

When presented with a set of three tradeoffs and asked which would be more important to them when selecting a health plan, San Francisco area residents were inclined to say that cost is more important than choice.

- 52% said the cost they would pay for the plan was more important
- 37% said the selection of doctors covered under the plan was more important
- 11% volunteered that both were equally important
 - Santa Clara residents believe that choice of doctors (53%) is more important than cost (35%), but all other counties in the region feel that cost is more important than choice. Those in San Mateo fell most strongly about this (62% favor cost compared to 23% choice).
 - There is no generational gap, with all ages agreeing that cost is more important than choice.

However, respondents were more likely to say that the coverage features of the plan were more important than the cost they would pay for the plan.

- 53% said that covering services and procedures for all types of medical conditions was more important
- 34% said the cost they would pay for the plan was more important
- 13% volunteered that both were equally important
- Residents in all counties of the region favor coverage over cost, except for Alameda residents who are split evenly between the two.

When offered the tradeoff between the freedom to choose any doctor versus coordination of care by a primary care physician, San Francisco area residents are more than twice as likely to choose freedom over coordination.

- 65% said that having the freedom to see whatever doctors you choose was more important
- 38% said having all of your care coordinated by your primary care physician was more important
- 7% felt both were equally important
 - The entire region supports choice over coordination.

Methodology

These results are based on a telephone survey conducted by Gallup of 402 Greater San Francisco area residents, including Santa Clara, Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties. Data were collected in March of 2008. Data were weighted to reflect U.S. Census Bureau estimates for the geographic area. The margin of sampling error is +/-4.9% for the overall sample, and is larger for subgroups.