



Sacred Heart
UNIVERSITY



Institute for Sustainability and Social Justice

National Poll on Healthcare Sustainability - December 2023



Report of Findings

December 6, 2023

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Sacred Heart
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Our Story

Sacred Heart University's Institute for Sustainability and Social Justice and GreatBlue Research partner to research salient issues facing the United States. This collaboration combines the academic excellence of a top-rated private University and the research design, analysis and reporting expertise of GreatBlue Research.

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Areas of Investigation

The Sacred Heart University Institute for Sustainability and Social Justice leveraged a quantitative research approach to address the following areas of investigation:

- Awareness of healthcare sustainability, and personal alignment with Sacred Heart University's definition for sustainability
- Perceptions towards different policy positions related to healthcare sustainability
- Outlook on the sustainability of the US healthcare system, currently, and for the next five (5) years
- Perceived barriers in the US to achieving a more sustainable healthcare system
- Understanding populations that are underserved by the US healthcare system and biggest healthcare concerns that require public policy remedies
- Impact of artificial intelligence ("AI") and anti-racism policies on healthcare sustainability
- Demographic profile of respondents

Research Methodology | Snapshot

<div>Methodology</div> <div>Digital survey*</div>	<div>No. of Completes</div> <div>2,000</div>	<div>No. of Questions</div> <div>37**</div>	<div>Sample</div> <div>Procured by GreatBlue</div>
<div>Target Market</div> <div>United States Residents***</div>	<div>Margin of Error</div> <div>+/- 2.53%</div>	<div>Confidence Level</div> <div>95%</div>	<div>Research Dates</div> <div>November 20-27, 2023</div>

* Data quality personnel, in addition to computer-aided interviewing platforms, ensure the integrity of the data is accurate.

** This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

*** A random sample of US residents were invited to the survey through a series of opt-in online/digital panels and were stratified by gender, age, race, education, and US geographic region. The final sample was then weighted according to gender, age, race, education, and US geographic region. Demographic weighting targets were originally derived from and based on the U.S. Census Bureau, 2022 American Community Survey 1-Year Estimates.

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71.5%
would still purchase
at an increased
price point

8.9%

5.4%

2.8%

0.0%

Negative Impact

Boomers

National Poll on Healthcare Sustainability | Executive Summary

- ❖ In Dec'23, there is a notable divide on the perceived sustainability of the US healthcare system. While 42.7% of Americans express concern, perceiving the system to be unsustainable, 33.2% hold a contrasting view, believing in its current sustainability.
- ❖ Key contributors to the perceived lack of sustainability in the US healthcare system are closely tied to issues of insurance coverage and accessibility, with two-fifths of Americans highlighting concerns about the lack of insurance (or inadequate coverage) (43.8%) and limited healthcare access in low-income communities (40.8%) as primary barriers.
- ❖ As a result, the vast majority of Americans believe that it is important for the healthcare industry to work in a way that supports equitable access to healthcare services for all different segments of the population (88.6%).
- ❖ Over half of Americans (51.6%) believe that ensuring universal access to healthcare will result in improved overall public health outcomes as well as enhanced individual well-being, while 28.5% express concerns that universal healthcare access might burden the system and lead to worse public and individual health outcomes.
- ❖ Diving deeper, Americans perceive rural communities (30.3%), people with disabilities (29.4%), older persons (28.4%), and Black/African Americans (28.1%) to be among the groups most underserved by the current US healthcare system.
- ❖ Furthermore, more than half of Americans believe in a more inclusive healthcare system that should treat and provide access to all individuals irrespective of their immigration status (53.5%). In contrast, a smaller proportion, just 26.7%, holds the view that undocumented immigrants should not be entitled to the same healthcare access as US citizens.
- ❖ 58.2% of Americans support the integration of healthcare sustainability into the design and lessons of future medical education and healthcare training; in contrast, 20.7% contend that medical education and healthcare training should exclusively prioritize industry-best practices and the most advanced care available, irregardless of sustainability considerations.
- ❖ Healthcare may be top-of-mind among voters heading into 2024's election year as 45.8% of Americans say they are willing to vote for candidates that support more sustainable healthcare.
- ❖ Finally, looking at the trends over time, significantly more US respondents are aware of the term "healthcare sustainability" in Dec'23 (66.2%) than Nov'22 (61.2%). While still strong, significantly fewer say that healthcare sustainability is important to them, personally, in Dec'23 (86.7% from 91.1% in Nov'22).

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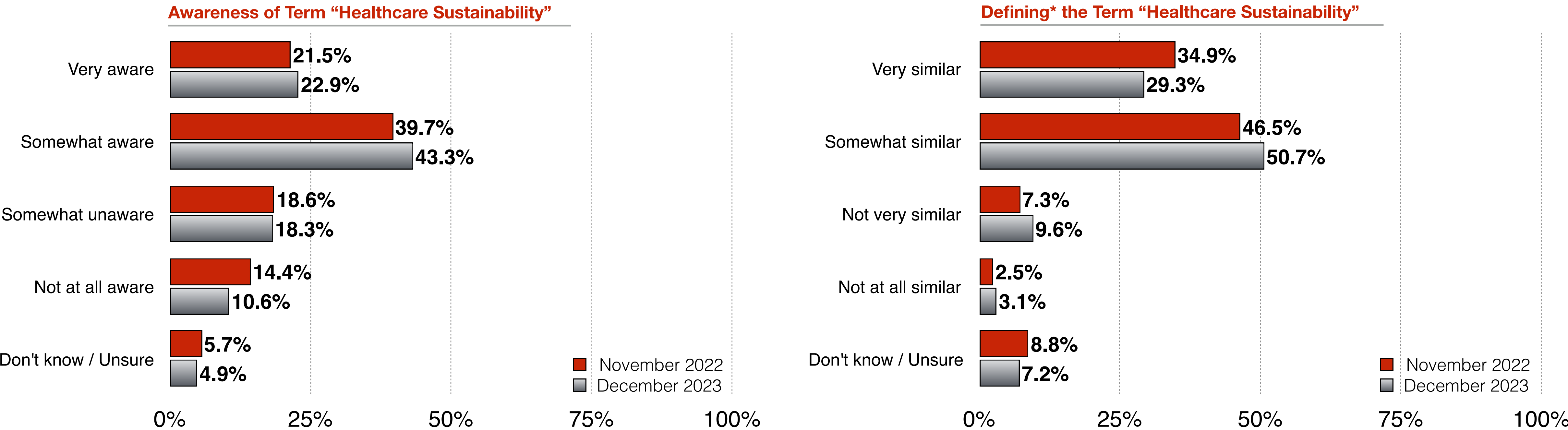
Negative Impact

Boomers

Healthcare Sustainability | Awareness Over Time

Two-thirds of Americans (66.2%) are either “very aware” (22.9%) or “somewhat aware” (43.3%) of the term “healthcare sustainability;” a *significant increase* over the 61.2% that were aware in Nov’22. When respondents were presented with Sacred Heart University’s definition* of “healthcare sustainability,” over four-fifths of Americans (80.0%) indicate the University’s definition is at least somewhat “similar” to their own definition.

- ❖ 71.3% of Americans age 18-34, 67.0% of Americans age 35-54, and 64.0% of Americans age 65+ are aware of the term “healthcare sustainability”, compared to 56.5% of Americans age 55-64.
- ❖ While there is no difference in awareness across political party lines, Americans with only a high school degree are significantly less likely to be aware of the term (59.5%) compared to those with at least some college education or a college/post-graduate degree.

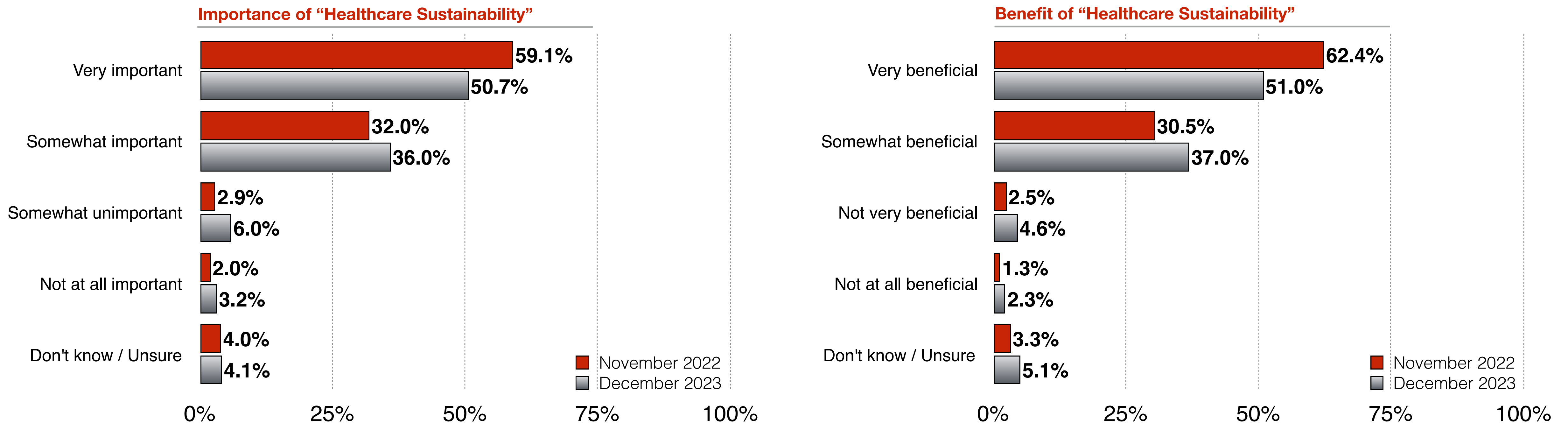


Q: How would you rate your level of awareness for the term **healthcare sustainability**?
Q: After reading the statement above, how similar would you say the statement is with your definition of **healthcare sustainability**?
*Definition of **healthcare sustainability** provided: “Healthcare sustainability relates to the ability for hospitals and healthcare systems to enhance quality of life and improve well-being in a population. A sustainable health system is a system that improves, maintains, or restores health, while minimizing negative impacts on the environment and leveraging opportunities to restore and improve it, to the benefit of the health and well-being of current and future generations.”
N=1,500 (Nov’22), N=2,000 (Dec’23)

Healthcare Sustainability | Importance Over Time

Almost nine-out-of-ten Americans (86.7%) report "healthcare sustainability" is either "very important" (50.7%) or "somewhat important" (36.0%) to them. Further, a similar frequency (88.0%) say that improving "healthcare sustainability" would be "very beneficial" (51.0%) or "somewhat beneficial" (37.0%) to their community. It should be noted that the rate of respondents electing to indicate that healthcare sustainability was "very important" to them and/or that greater healthcare sustainability was "very beneficial" to their community both *significantly declined* from Nov'22.

- ❖ Healthcare sustainability is significantly more important to Democrats (92.8%) compared to Republicans (85.8%) in Dec'23.
- ❖ Interestingly, rural Americans were slightly less likely to see a benefit to their community (85.0%) compared to the overall population.



Q: How important is **healthcare sustainability** to you? Would you say...

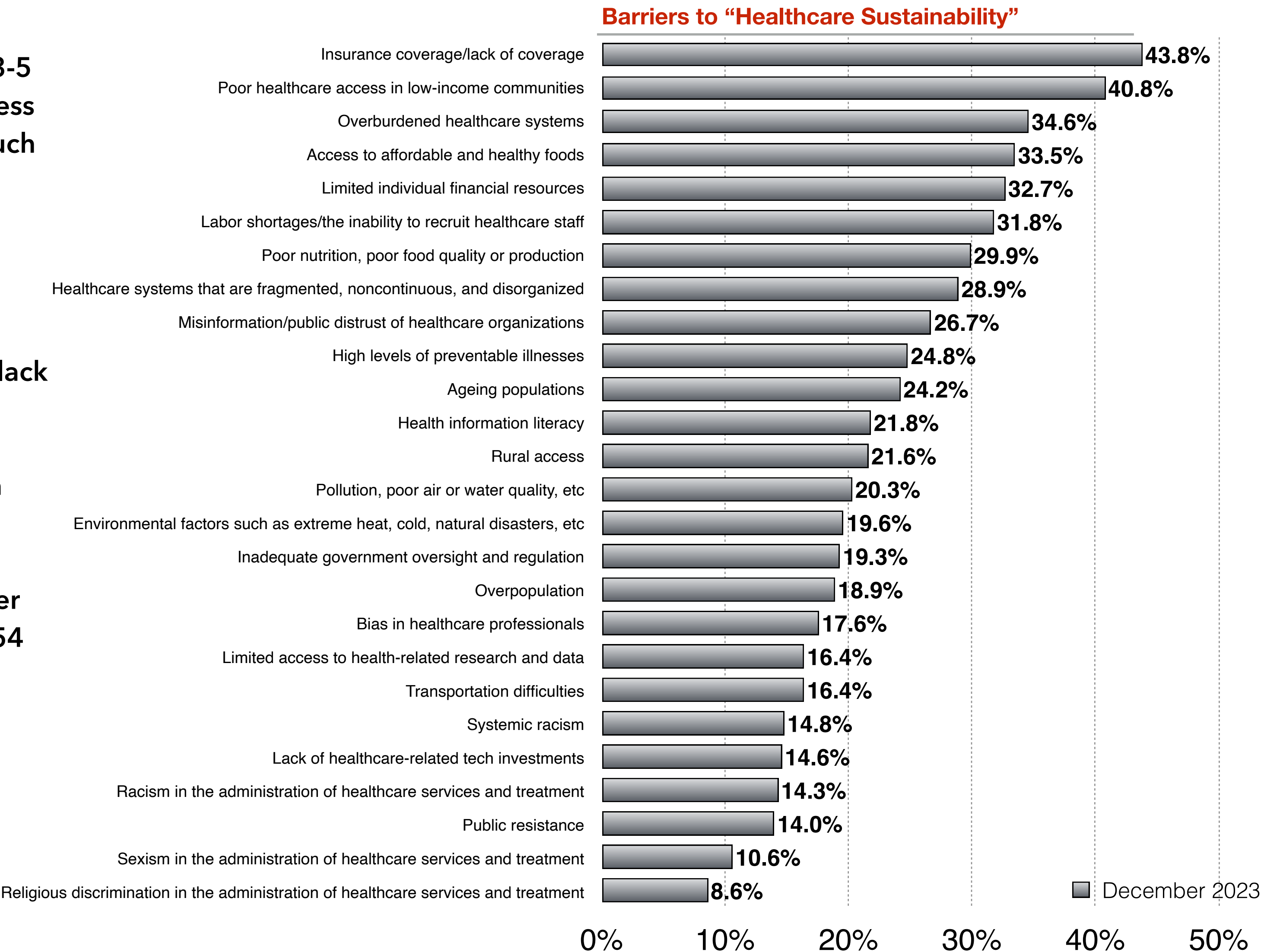
Q: By improving **healthcare sustainability**, what level of benefit do you think your own community would experience?

N=1,500 (Nov'22), N=2,000 (Dec'23)

Healthcare Sustainability | Perceived Barriers

As of Dec'23, when asked to provide the primary barriers to achieve greater healthcare sustainability in the US, insurance coverage, or lack thereof, is the top barrier cited for the next 3-5 years (43.8%). This is followed closely by poor healthcare access in low-income communities (40.8%). Other systemic issues such as labor shortages in the healthcare industry, fragmented/disorganized healthcare systems, and public distrust/misinformation join the top ten (10) barriers to healthcare sustainability in the US.

- ❖ Americans age 65+ (62.7%) and Americans age 55-64 (52.1%) are significantly more likely to cite insurance, or lack thereof, as a barrier compared to Americans age 18-34 (33.6%).
- ❖ One-third of rural Americans (32.7%) say rural access is a primary barrier to greater healthcare sustainability.
- ❖ Americans age 65+ (46.7%) and age 55-64 (37.0%) are significantly more likely to cite labor shortages as a barrier compared to Americans age 18-34 (26.7%) and age 35-54 (26.1%).

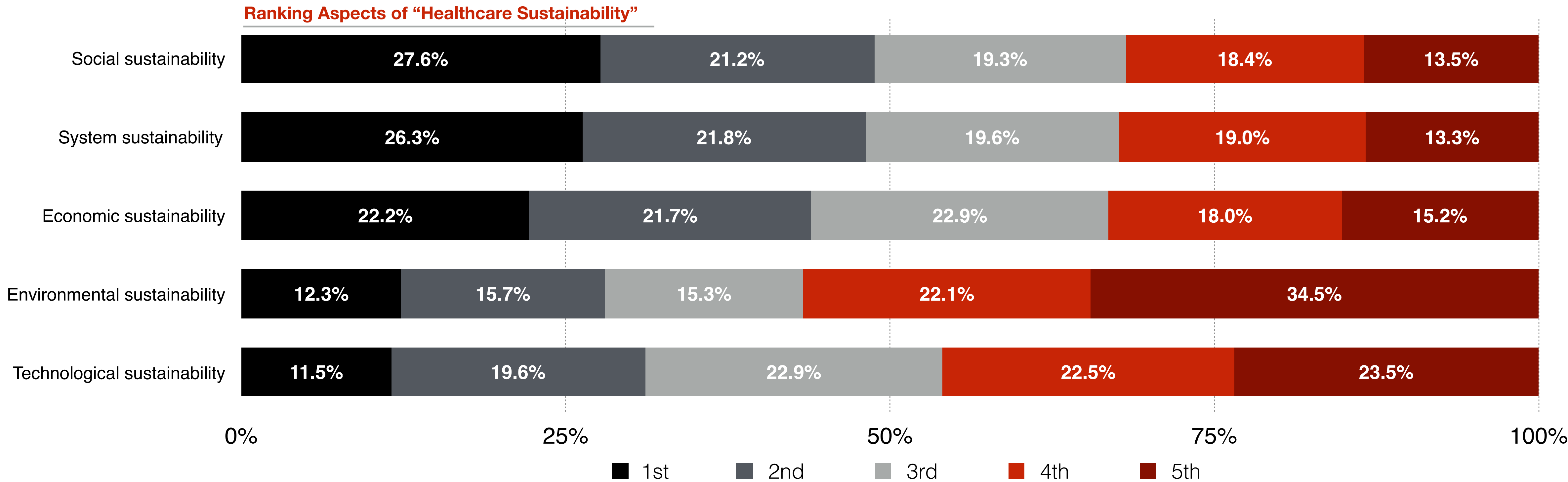


Q: What would you say are the primary barriers to achieving greater **healthcare sustainability** in the near future (i.e. next 3-5 years)? Please select all of the following that apply.
N=2,000 (Dec'23)

Healthcare Sustainability | Ranking Factors

When asked to rank various aspects of sustainability in order of importance on the overall sustainability of the US healthcare system, respondents indicate social, systemic, and economic sustainability are the among the top tier of importance, with at-least two-thirds ranking these within their top three (3).

- ❖ Significantly more Americans age 55-64 (35.0%) and age 65+ (31.5%) rank social sustainability #1, compared to Americans age 18-34 (24.9%) or age 35-54 (25.0%).
- ❖ Significantly more rural Americans (30.0%) ranked system sustainability #1, compared to urban Americans (22.3%).

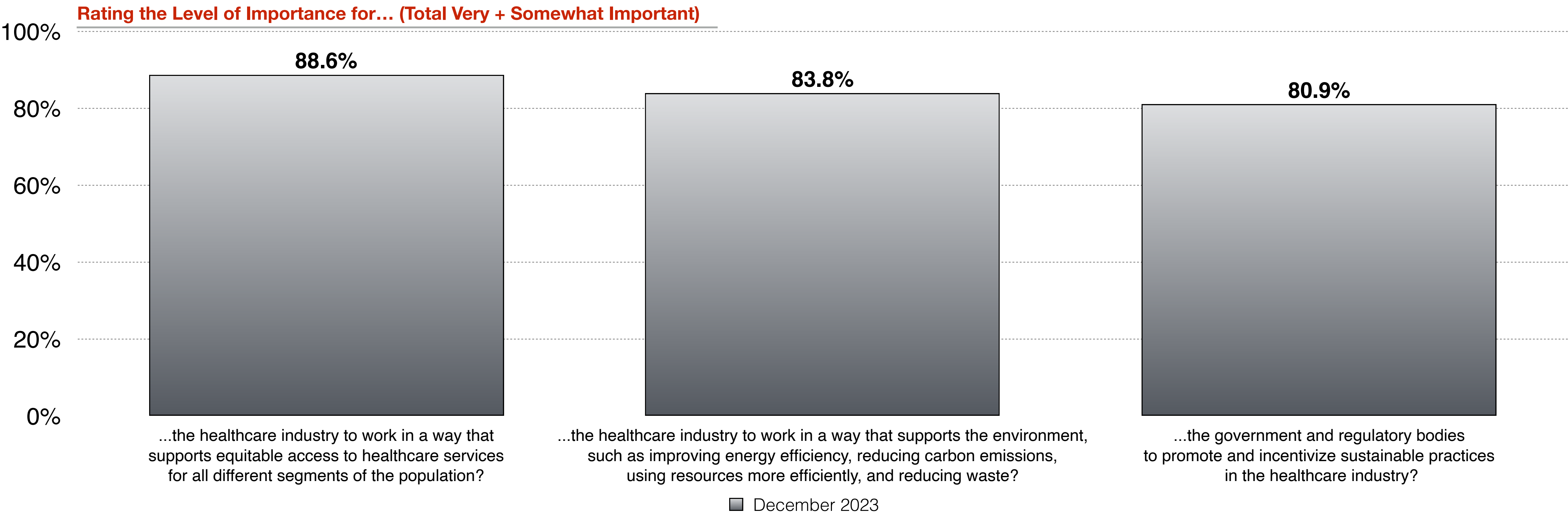


Q: Based on the definition above and your own understanding of the issue, please rank each of the following aspects of sustainability on their importance to the overall sustainability of the healthcare system(s) in the US.
N=2,000 (Dec'23)

Healthcare Sustainability | Importance of Goals

Vast majorities of Americans believe it is important for the healthcare industry to work in a way that both a) supports equitable access across different segments of the population (88.6%), and b) supports the environment (83.8%). In addition, four-fifths also say the government and regulatory bodies have a role in supporting and incentivizing sustainable healthcare practices (80.9%).

- ❖ Government and regulatory bodies incentivizing sustainable healthcare practices is significantly more important to Democrats (91.7%) compared to Republicans (73.2%) in Dec'23.
- ❖ Americans with a college degree (84.7%) or post-graduate degree (85.7%) also place significantly more importance on regulations incentivizing sustainable healthcare practices compared to those with a high school degree (78.2%).

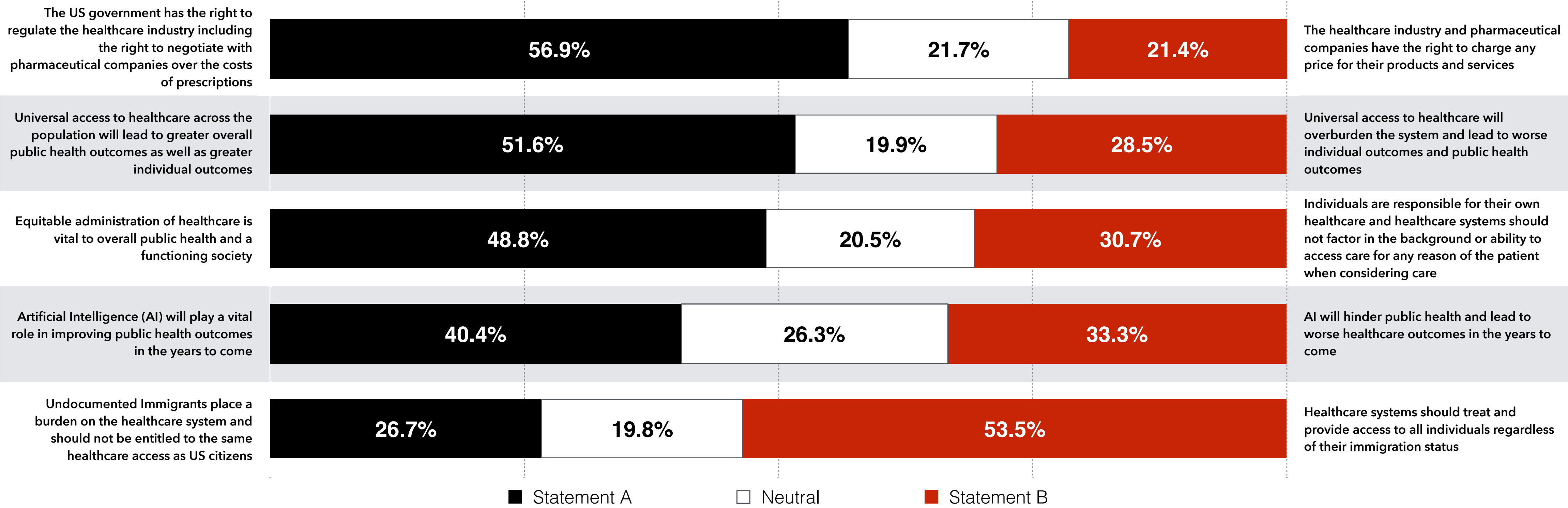


Q: How important do you think it is for the healthcare industry to work in a way that supports the environment, such as improving energy efficiency, reducing carbon emissions, using resources more efficiently, and reducing waste?
Q: How important do you think it is for the government and regulatory bodies to promote and incentivize sustainable practices in the healthcare industry?
Q: How important do you think it is for the healthcare industry to work in a way that supports equitable access to healthcare services for all different segments of the population?
N=2,000 (Dec'23)

Healthcare Sustainability | Policy Perceptions

Slight majorities of Americans support more progressive healthcare sustainability goals. Over-half say the US government has a right to regulate the healthcare industry and negotiate prescription drug costs (56.9%), agree that health systems should provide access to all individuals regardless of immigration status (53.5%), and believe that universal access to healthcare will lead to both greater public health outcomes and individual health outcomes (51.6%).

- ❖ Democrats are more supportive of both universal access to healthcare to improve individual and public health outcomes (64.8%), and the US government’s ability to regulate the healthcare industry and negotiate prescription drug prices (63.2%).
- ❖ Interestingly, Americans age 65+ (57.3%) are significantly more supportive of universal access to healthcare compared Americans age 18-34 (47.2%).

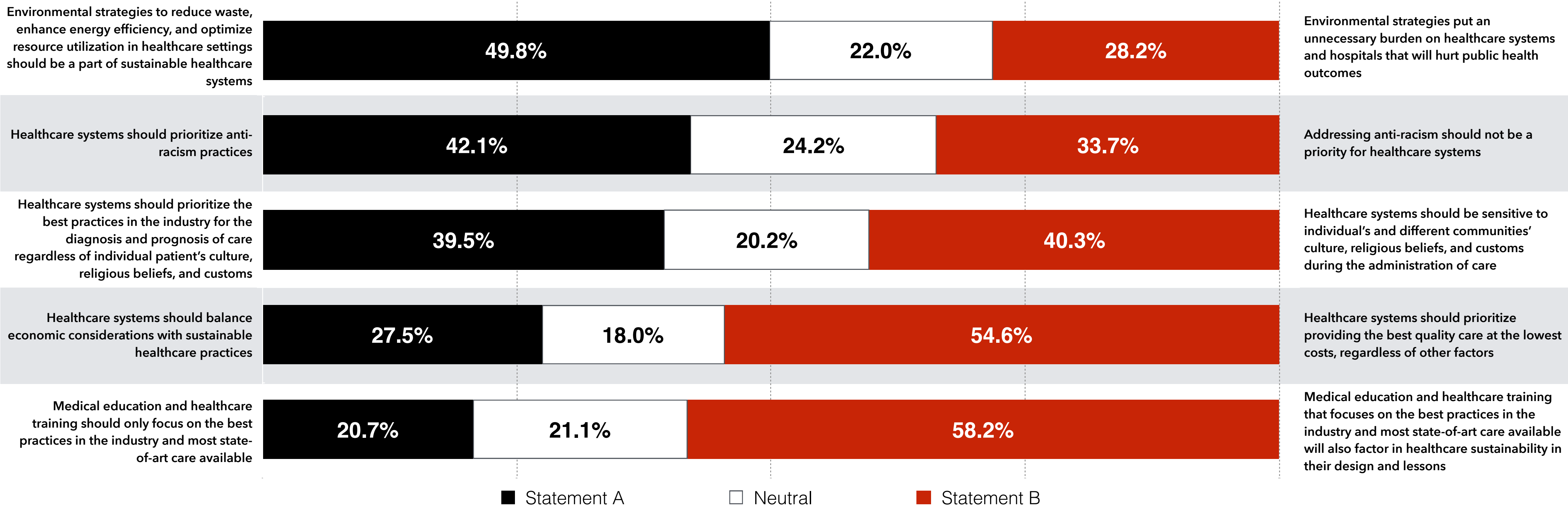


Q: Now please read the following pair of statements regarding healthcare sustainability in the US in 2023. After reading each pair, please select the statement that closely aligns with your opinion on the issue. If you agree with parts of both statements, please select the statement that MOST closely aligns with your opinion on that issue. If you are truly undecided after considering any given issue, you can select neutral.
N=2,000 (Dec'23)

Healthcare Sustainability | Systemic Perceptions

Almost three-fifths of Americans agree that the best and most state-of-art practices in medical education and health training will include healthcare sustainability in their design (58.2%), while more than half also say that healthcare systems should prioritize the best care at the lowest costs - regardless of other factors such as healthcare sustainability (54.6%).

- ❖ While significantly more Republicans (62.1%) than Democrats (52.9%) believe healthcare systems should prioritize providing the best quality care at the lowest costs, majorities of both parties support that stance over balancing economic considerations and sustainable healthcare practices.
- ❖ Americans with a college degree (53.6%) or post-graduate degree (55.2%) also place significantly more importance on environmental strategies within healthcare sustainability compared to those with a high school degree (45.4%).



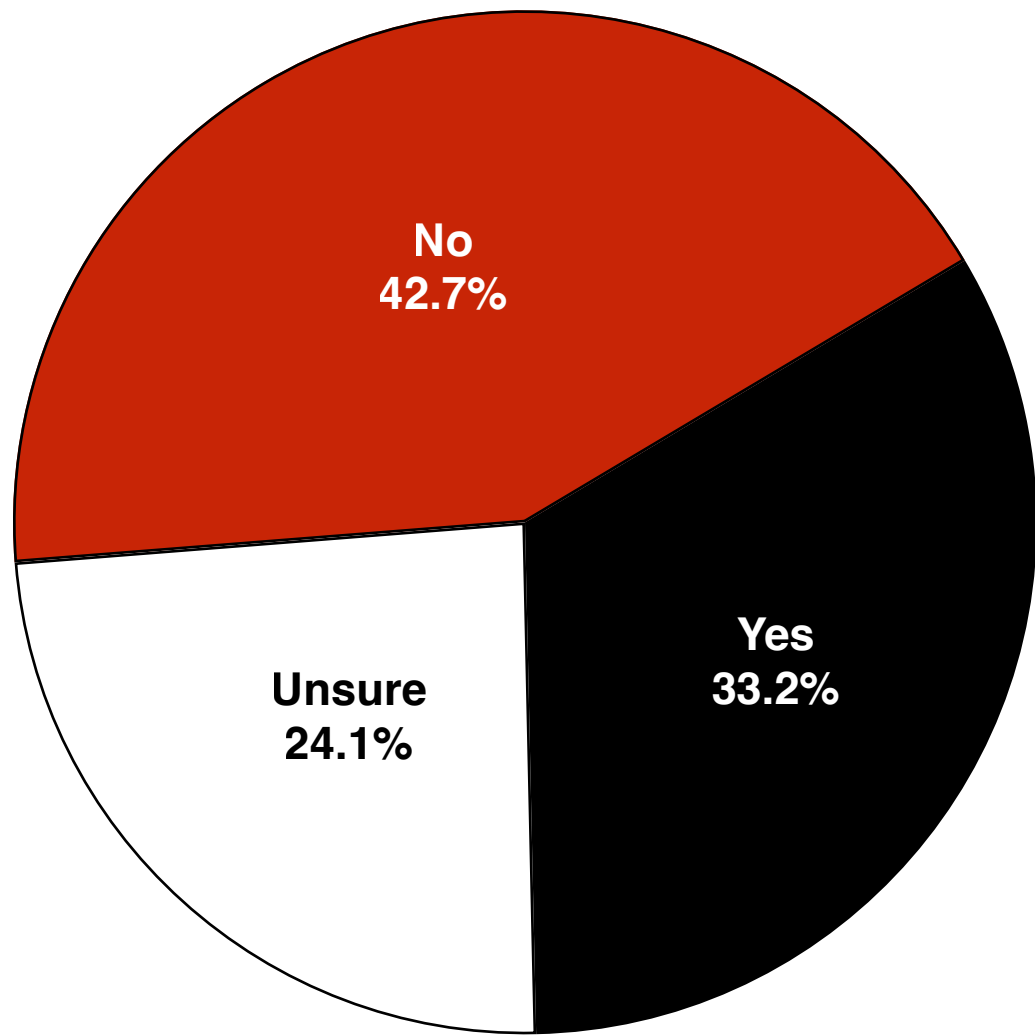
Q: Now please read the following pair of statements regarding healthcare sustainability in the US in 2023. After reading each pair, please select the statement that closely aligns with your opinion on the issue. If you agree with parts of both statements, please select the statement that MOST closely aligns with your opinion on that issue. If you are truly undecided after considering any given issue, you can select neutral.
N=2,000 (Dec'23)

US Healthcare System | Sustainability Outlook

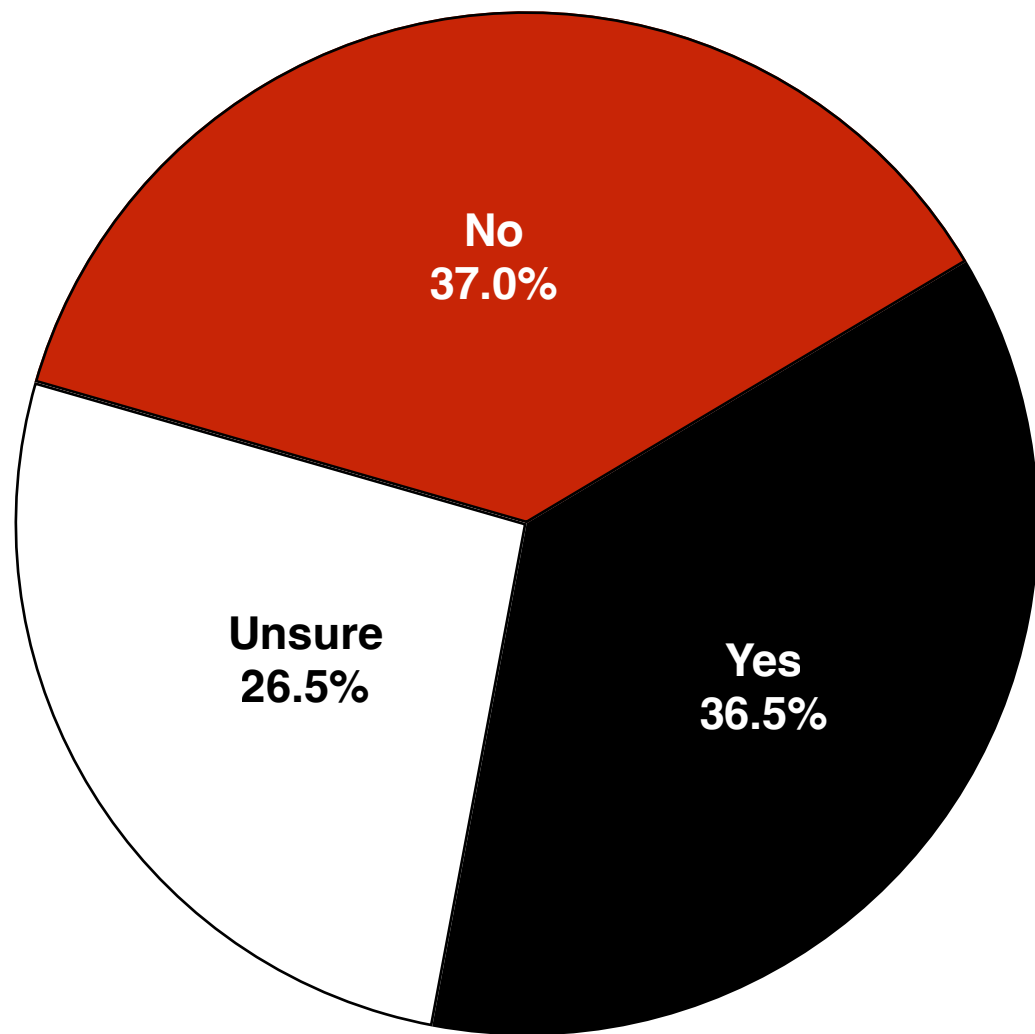
Fewer respondents believe the US healthcare system is currently sustainable than not (42.7% "no" vs. 33.2% "yes" in Dec'23). And, moving forward, respondents are almost equally divided on whether or not they believe the healthcare system will be sustainable in five (5) years (37.0% "no" vs. 36.5% "yes" in Dec'23).

- ❖ Interestingly, Americans age 18-34 are more likely to believe the US healthcare system is sustainable in Dec'23 (40.0%), compared to Americans age 35-54 (31.4%), Americans age 55-64 (25.2%), and Americans age 65+ (31.8%).
- ❖ There was no difference in the perceived sustainability of the US healthcare system between Democrats (37.7%) and Republicans (37.5%).
- ❖ Rural Americans (30.9%) are significantly less likely to believe in the sustainability of the US healthcare system compared to urban Americans (41.3%).

Is the US healthcare system currently sustainable?



Will US healthcare remain sustainable for the next 5 years?

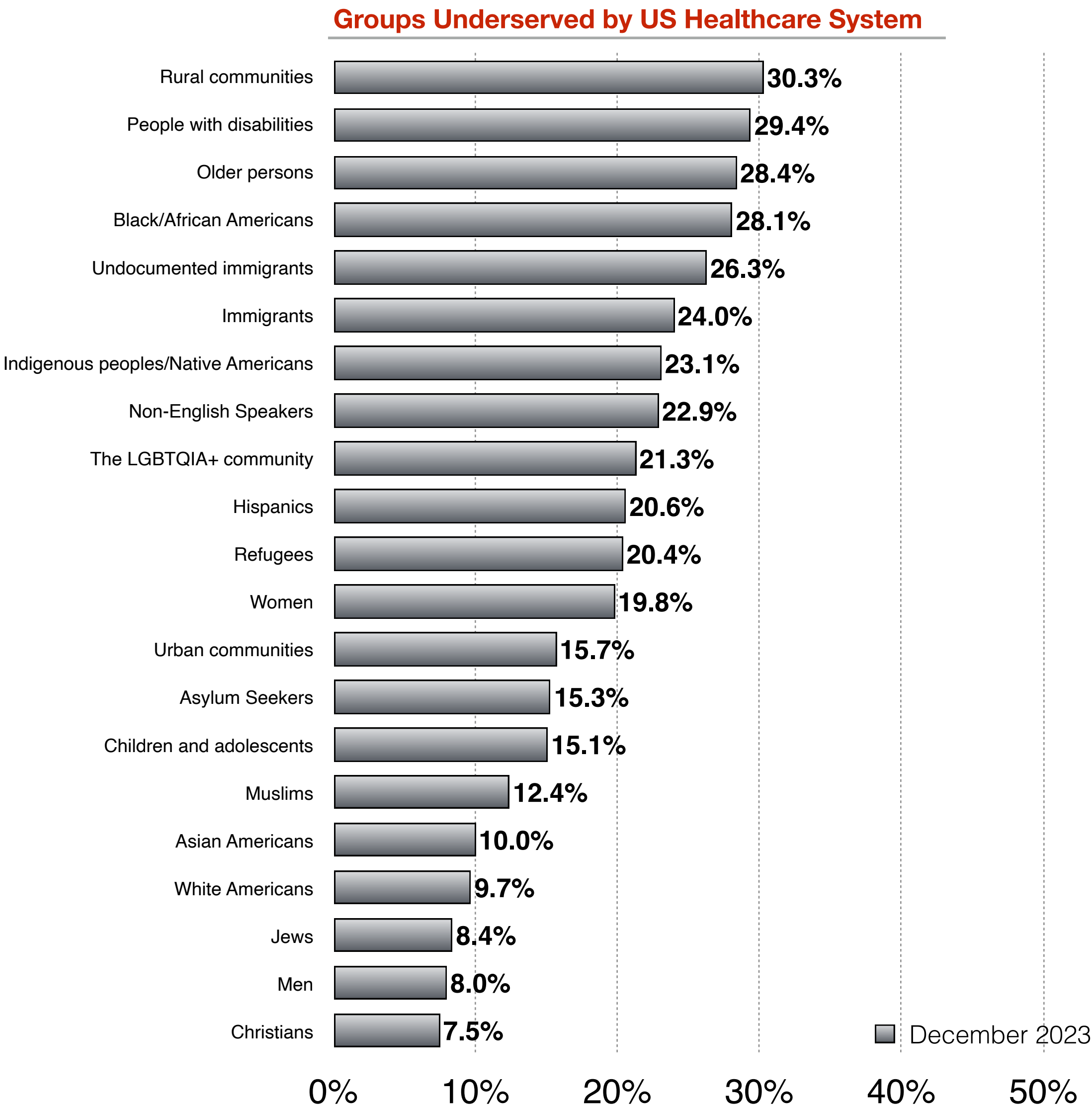


Q: Overall, based on all you know or have heard, do you believe the US healthcare system is currently sustainable?
Q: And, without any major changes, do you believe the US healthcare system will remain sustainable until 2028 (i.e. in the next 5 years)?
N=2,000 (Dec'23)

US Healthcare System | Underserved Groups

Rural Communities (30.3%), people with disabilities (29.4%), older persons (28.4%), and Black/African Americans (28.1%) are among the groups that are perceived to be the most underserved by the US healthcare system. Approximately, one-quarter of Americans also say that immigrants - regardless of legal status - are underserved by the healthcare system.

- ❖ Rural Americans (39.5%) are significantly more likely to feel that they, themselves, in rural communities are underserved by the healthcare system compared to suburban Americans (31.8%) and urban Americans (22.1%).
- ❖ Democrats are more likely to say Black/African Americans (41.7%), undocumented immigrants (38.3%), and the LGBTQIA+ community (33.0%) are currently underserved compared to Republicans.
- ❖ In general, Americans with at least some college education are more likely than those with only a high school degree to say immigrants, refugees, asylum seekers, and undocumented immigrants are all underserved by the US healthcare system.

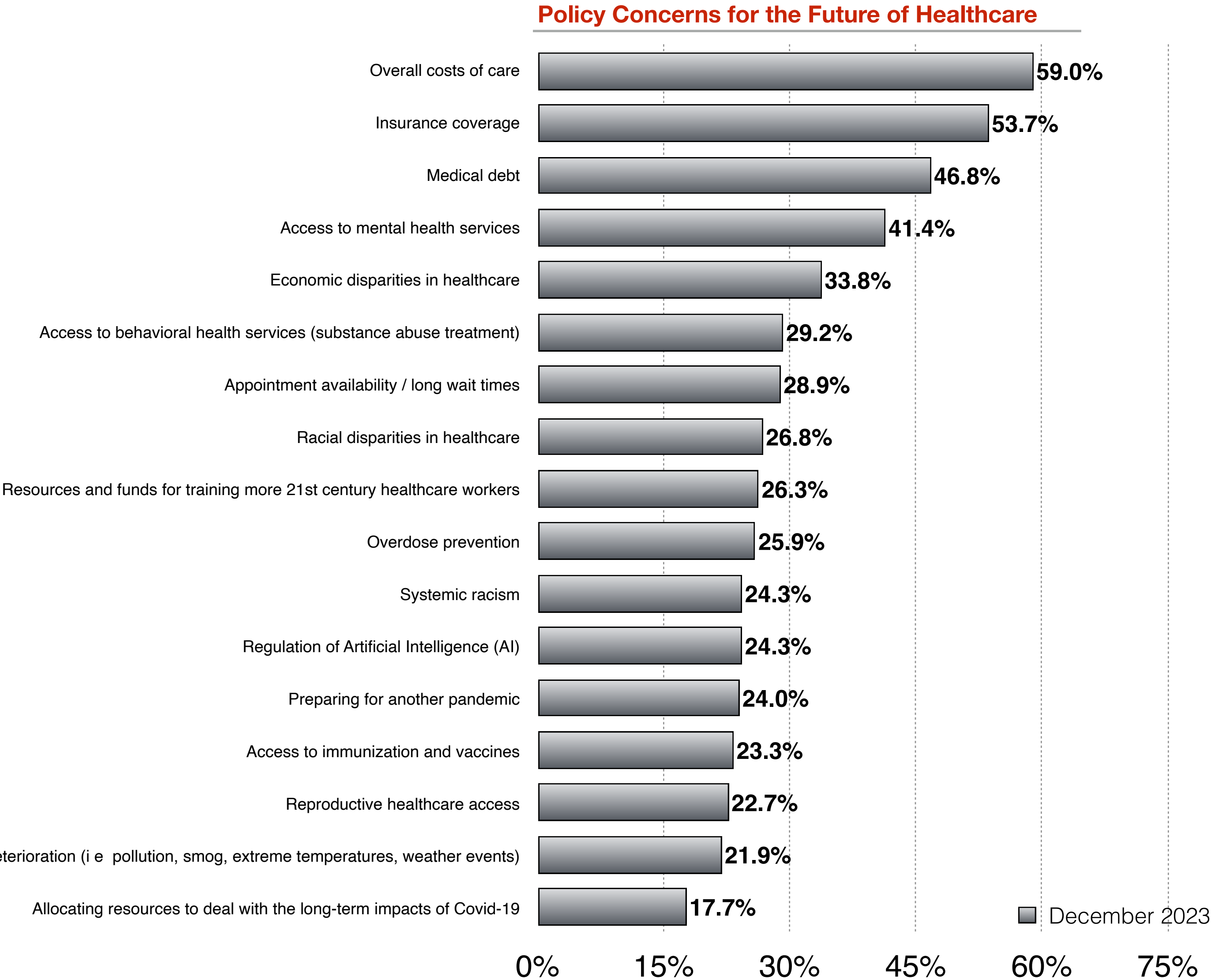


Q: Which, if any, of the following groups do you think are currently being underserved by the healthcare system in the US? Please select all that apply.
N=2,000 (Dec'23)

US Healthcare System | Policy Concerns

Overall costs (59.0%), insurance coverage (53.7%), and medical debt (46.8%) are the biggest concerns Americans feel should be addressed to through policy changes at the federal or state level. Fewer, however, feel long term challenges such as environmental deterioration (21.9%) and dealing with the long-term impacts of Covid-19 (17.7%) should be addressed through public policy.

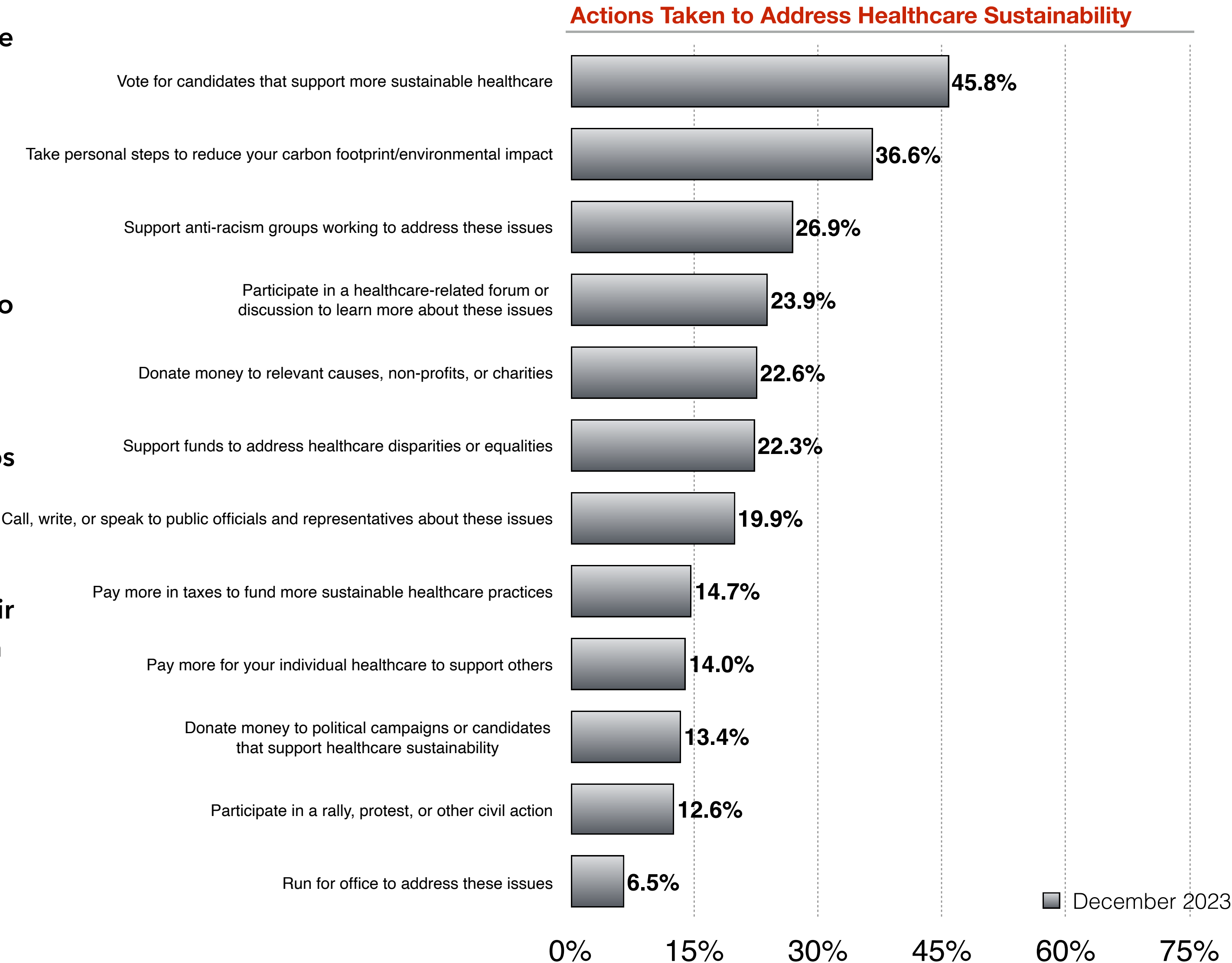
- ❖ Concern for the overall cost of care is closely tied to age. 48.5% of Americans age 18-34 say costs of care are a primary concern compared to 58.8% of Americans age 35-54, 66.4% of Americans age 55-64, and 70.9% of Americans age 65+.
- ❖ Overall, Americans with at least some college education are more likely than those with only a high school degree to say economic disparities in healthcare are a major concern that requires public policy changes.
- ❖ Suburban Americans (43.3%) and rural Americans (44.5%) are more likely than urban Americans (37.0%) to cite access to mental health services as a policy concern.



Q: In general, what do you feel are the biggest concerns or challenges facing the US healthcare industry that should be addressed with public policy at the federal or state level? Please select all that apply.
N=2,000 (Dec'23)

Over four-fifths of Americans say they are willing to vote for candidates that support more sustainable healthcare in the future (45.8%), and more than a third are willing to take personal steps to reduce their carbon footprint/environmental impact (36.6%). However, fewer are willing to take more financial steps such as pay more in taxes to support sustainable healthcare practices (14.7%) or pay more for their individual healthcare to support others (14.0%).

- ❖ Americans age 18-34 (32.2%) are significantly more likely to donate money to relevant causes, non-profits, or charities than Americans age 35-54 (20.5%), Americans age 55-64 (15.8%), and Americans age 65+ (15.5%).
- ❖ Democrats (45.0%) are significantly more likely to take steps to reduce their own carbon footprint and environmental impact than Republicans (26.9%).
- ❖ Suburban Americans (40.9%), and rural Americans (37.0%) are also significantly more likely to take steps to reduce their own carbon footprint and environmental impact than urban Americans (30.5%).
- ❖ Americans with at least some college education are more likely than those with only a high school degree to say they would vote for candidates that support more sustainable healthcare.



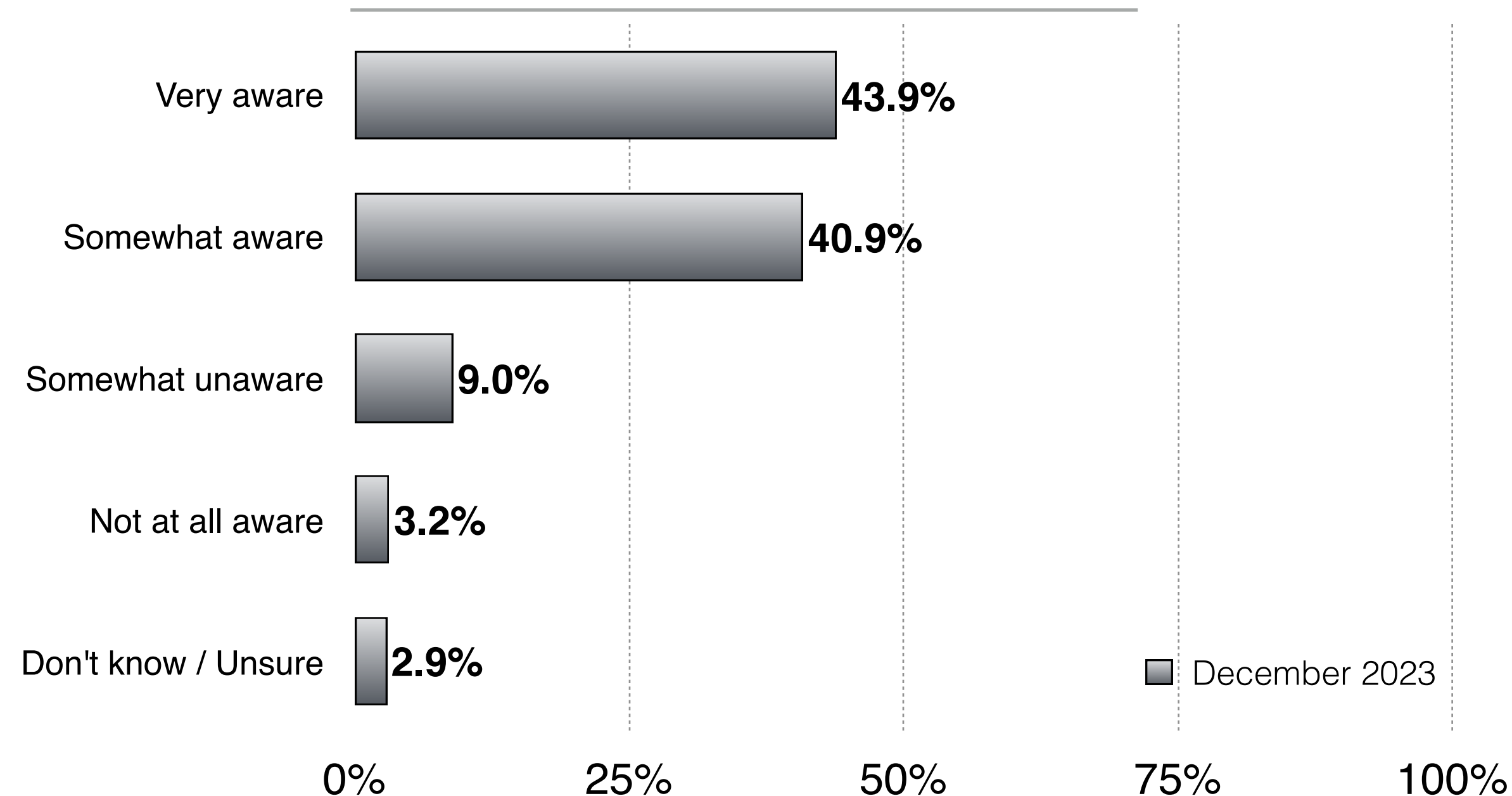
Q: Finally, which, if any, of the following actions or steps would you be willing to take in your personal life to help address healthcare sustainability issues in the future?
N=2,000 (Dec'23)

Anti-Racism | Awareness & Importance

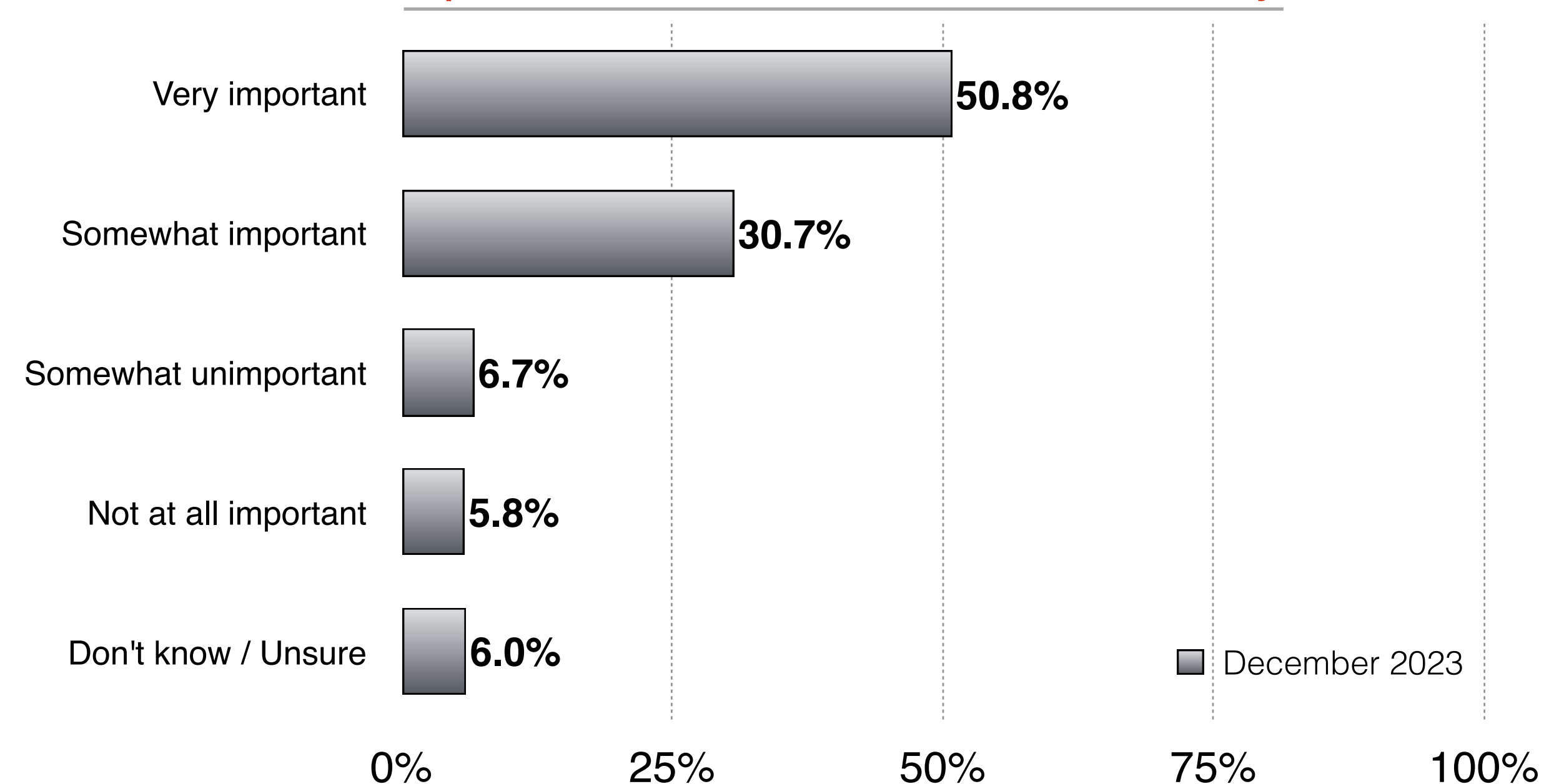
Over eight-in-ten Americans (84.8%) are either "very aware" (43.9%) or "somewhat aware" (40.9%) of the term "anti-racism." When respondents were presented with Sacred Heart University's definition* of "anti-racism," over four-in-five (81.5%) indicate it is "very important" (50.8%) or "somewhat important" (30.7%) that healthcare sustainability policies promote anti-racism.

- ❖ Americans with a college degree (89.0%) or post-graduate degree (95.9%) are significantly more aware of the term "anti-racism" compared to those with a high school degree (81.0%).
- ❖ Republicans place significantly less importance of promoting anti-racism within healthcare sustainability (73.2%) compared to Democrats (92.9%).
- ❖ Significantly more urban Americans (85.4%) than rural Americans (78.4%) say it is important to promote anti-racism within healthcare sustainability.

Awareness of Term "Anti-Racism"



Importance of Anti-Racism in Healthcare Sustainability



Q: Firstly, how would you rate your level of awareness for the term **anti-racism**?

Q: How important are healthcare sustainability policies that promote **anti-racism** to you? Would you say...

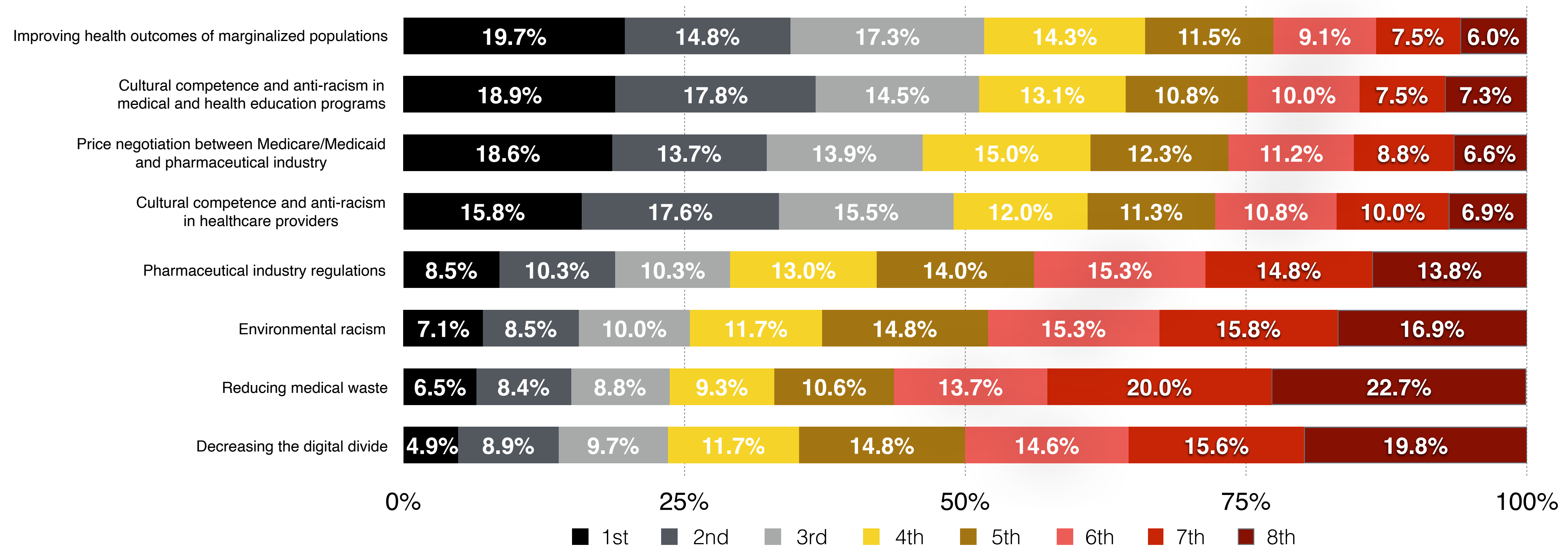
*Definition of **anti-racism** provided: "Anti-racism refers to a broad range of ideas and policies aimed at combating racial prejudice ingrained in our institutions, structures and systems, and the unfair treatment of specific racial groups caused by existing policies and laws."

N=2,000 (Dec'23)

Anti-Racism | Impact on Healthcare Sustainability

When thinking of healthcare sustainability specifically in the lens of promoting anti-racist outcomes, more than half of Americans ranked improving health outcomes of marginalized populations (51.7%) and cultural competence and anti-racism in medical and health education programs (51.2%) within their top three (3) priorities.

- ❖ 22.3% of Democrats ranked improving health outcomes of marginalized populations #1 compared to 16.9% of Republicans.
- ❖ 21.6% of urban Americans ranked improving health outcomes of marginalized populations #1 compared to 17.0% of rural Americans.
- ❖ 21.0% of Americans age 65+ ranked cultural competence and anti-racism in medical and health education programs #1 compared to 16.6% of Americans age 18-34.

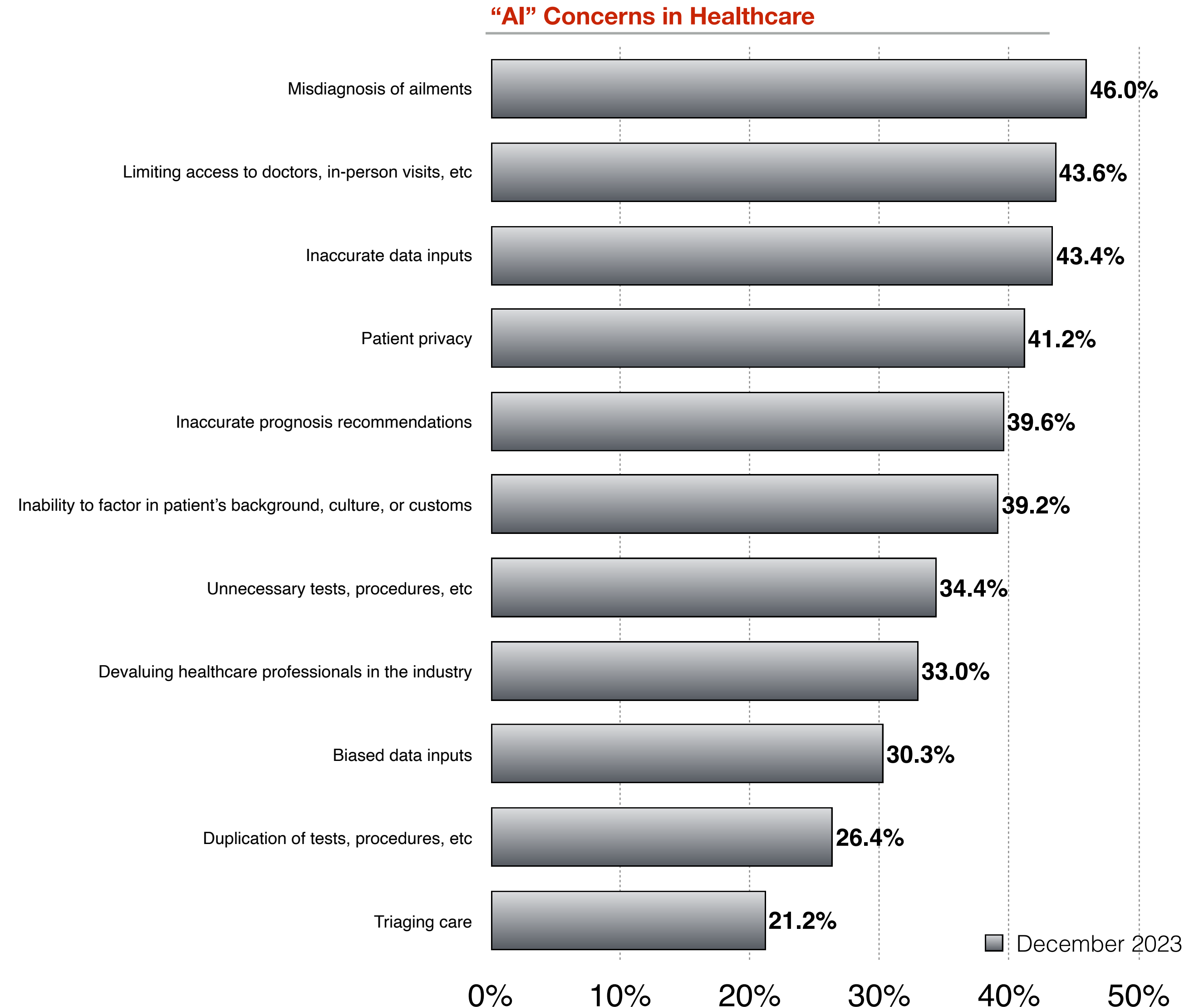


Q: Please rank the following healthcare sustainability aspects related to the promotion of anti-racism in order of importance to you, where the top is the most important characteristic, and the bottom is the least important characteristic.
N=2,000 (Dec'23)

Artificial Intelligence | Healthcare Concerns

Americans see myriad concerns related to the use of Artificial Intelligence ("AI") within the healthcare industry - most notably concerns over the misdiagnosis of ailments (46.0%), limiting access to doctors, in-person visits (43.6%), and inaccurate data inputs (43.4%). However, fewer are concerned that AI will lead to a triage of care (21.2%).

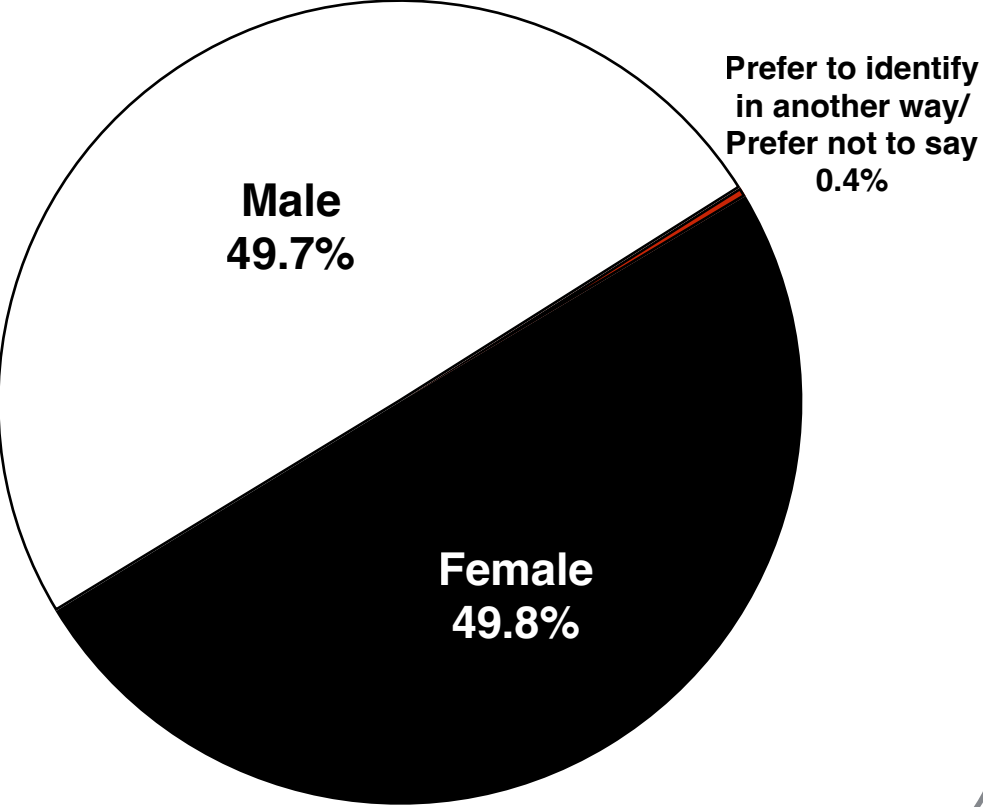
- ❖ Concerns over AI were closely linked to education. For example, while 40.0% of Americans with a high school degree are concerned over the misdiagnosis of ailments through AI, that jumps to 49.5% among those with at least some college, 50.7% among Americans with a college degree and 49.7% among those with a postgraduate degree.
- ❖ This trend was also true in the area of concern over inaccurate data inputs.
- ❖ Americans age 55-64 (47.3%), and Americans age 65+ (52.3%) are more concerned that AI will limit access to doctors and in-person visits than Americans age 18-34 (38.7%) and Americans age 35-54 (41.7%).



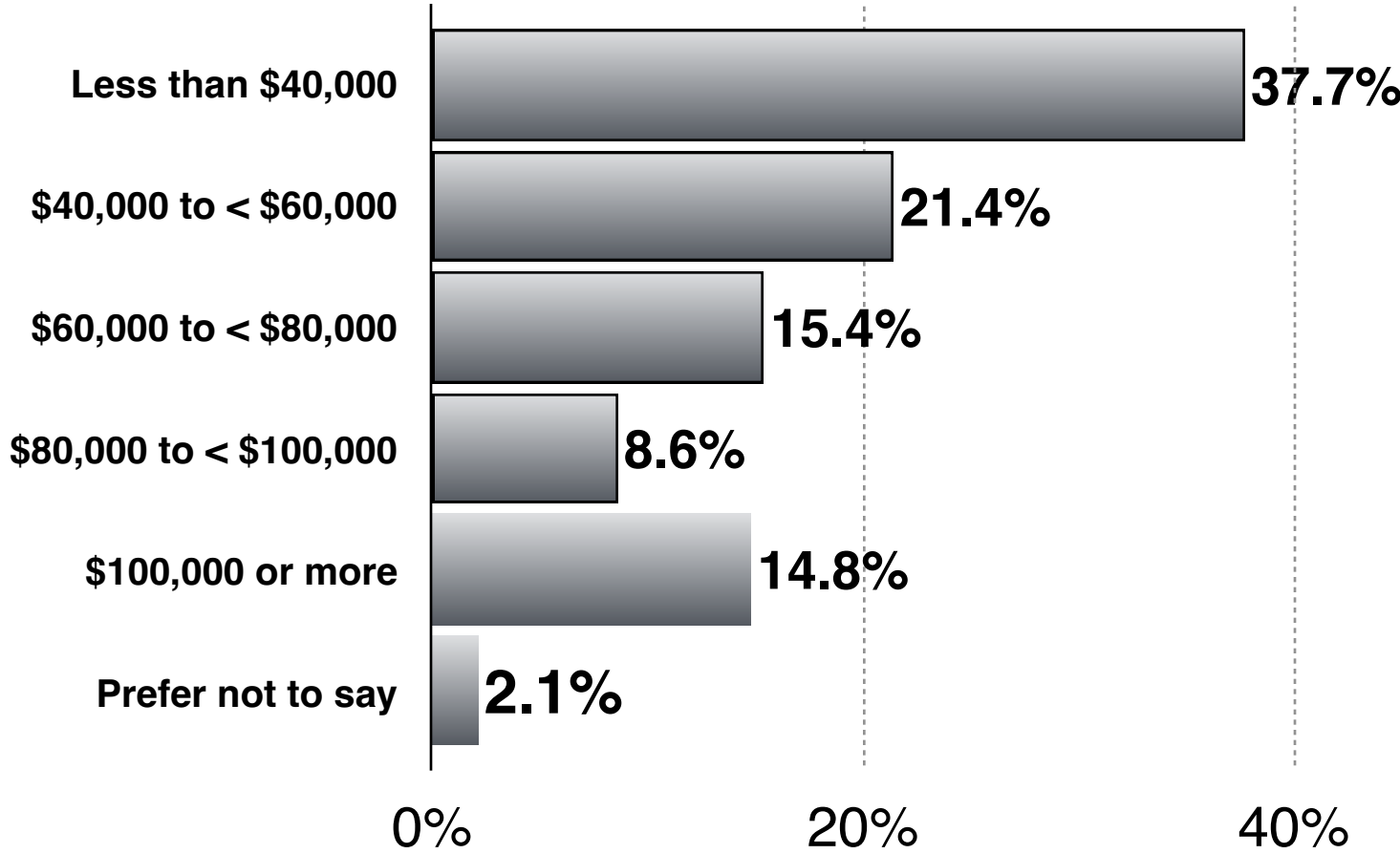
Q: Regardless of your opinions on Artificial Intelligence (AI), what do you feel could be the biggest concerns or challenges facing the integration of AI within the healthcare industry in the near future (i.e. next 3-5 years)? Please select all that apply.
N=2,000 (Dec'23)

Demographic Profile | December 2023

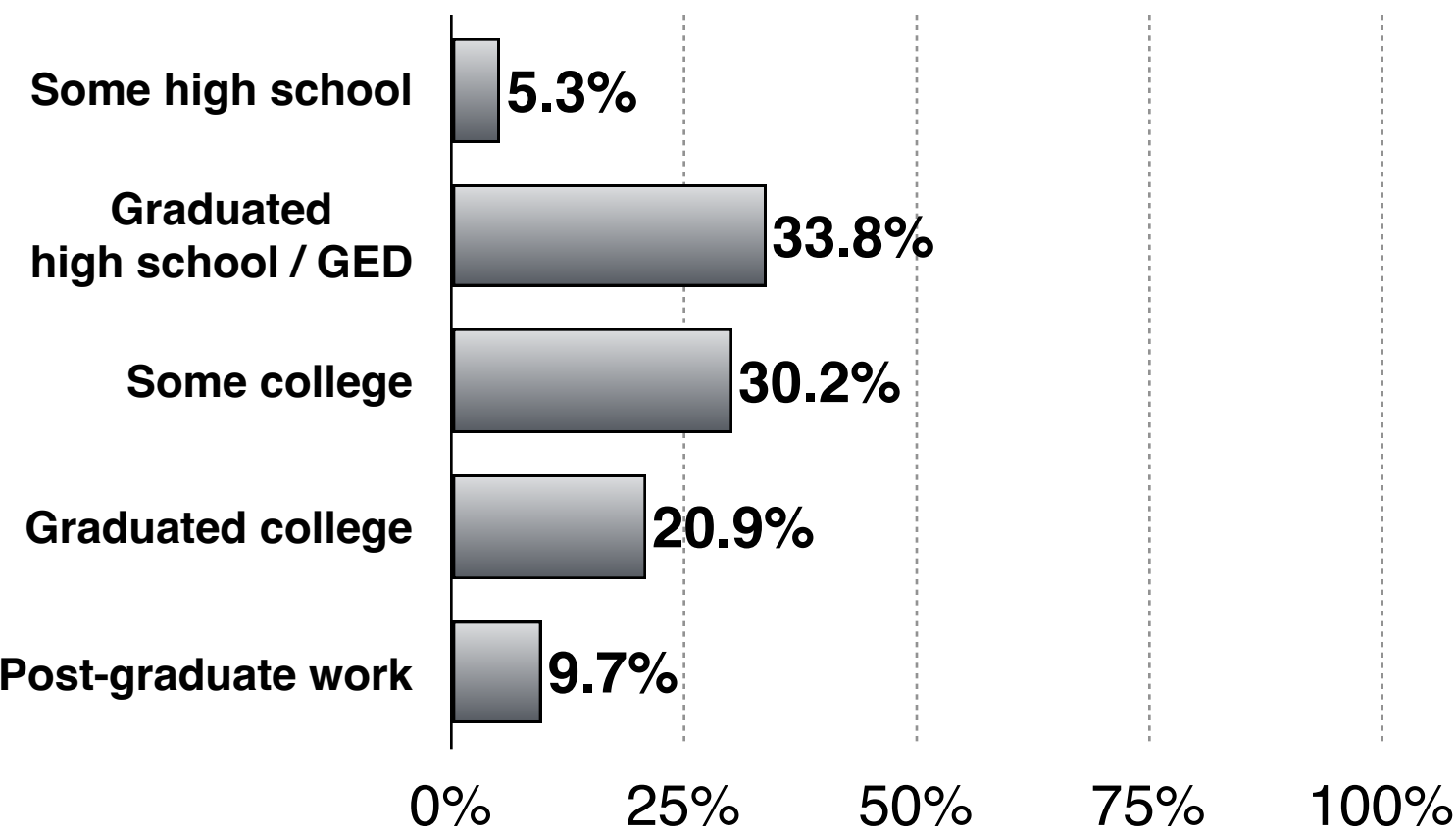
Gender



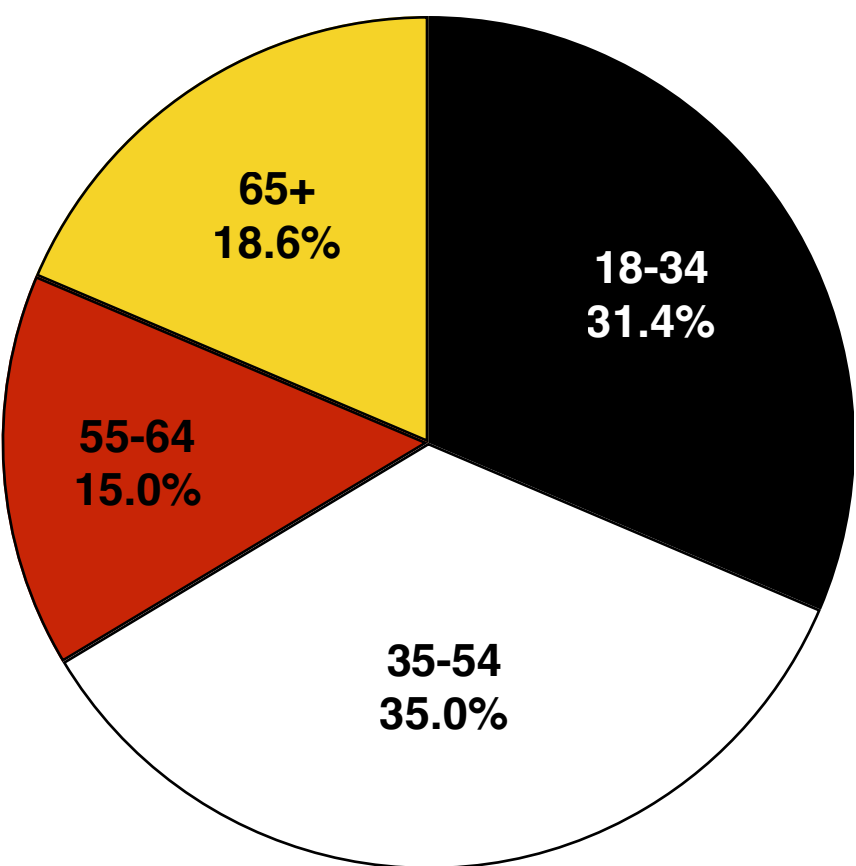
Income



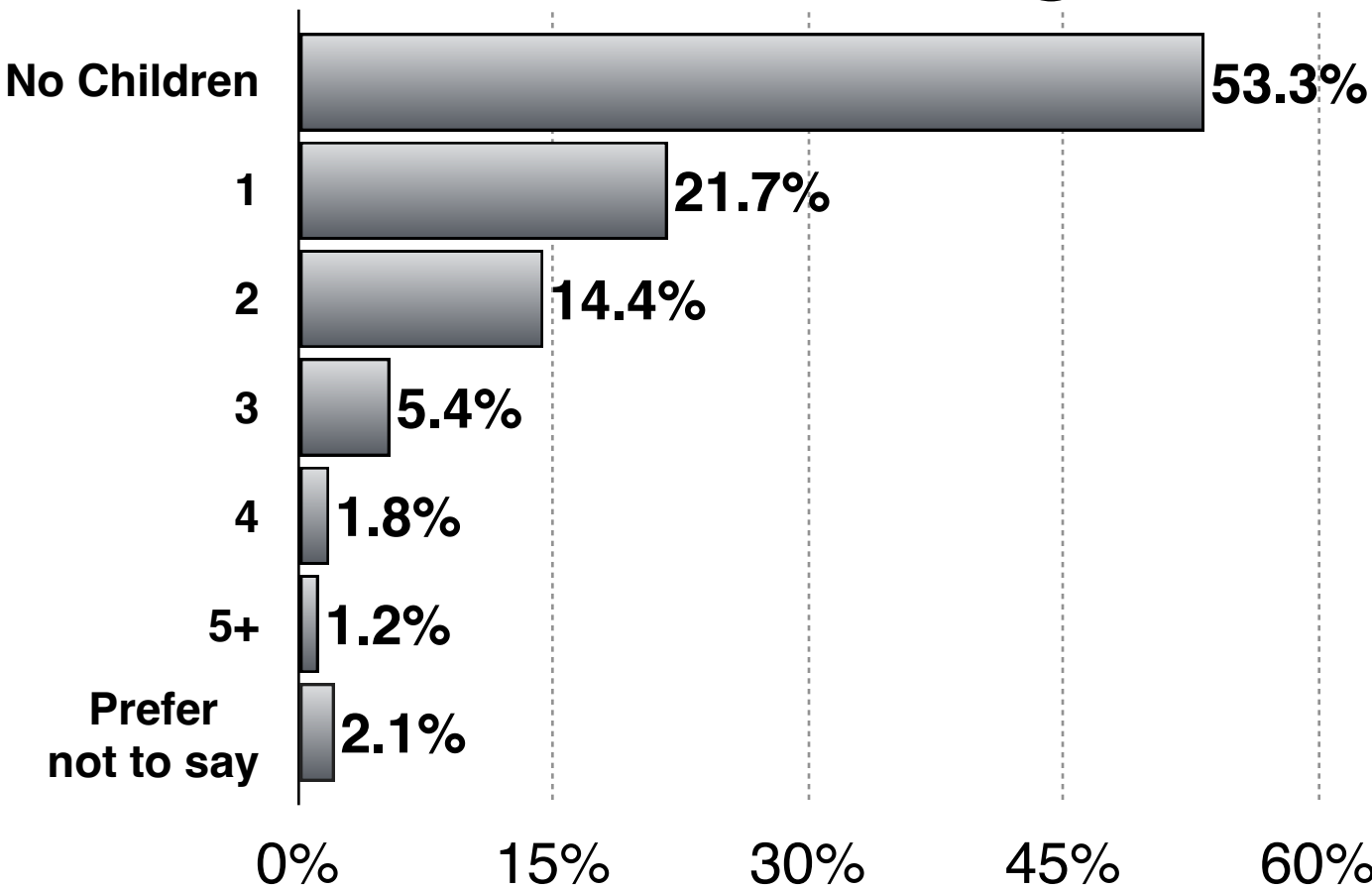
Education Level



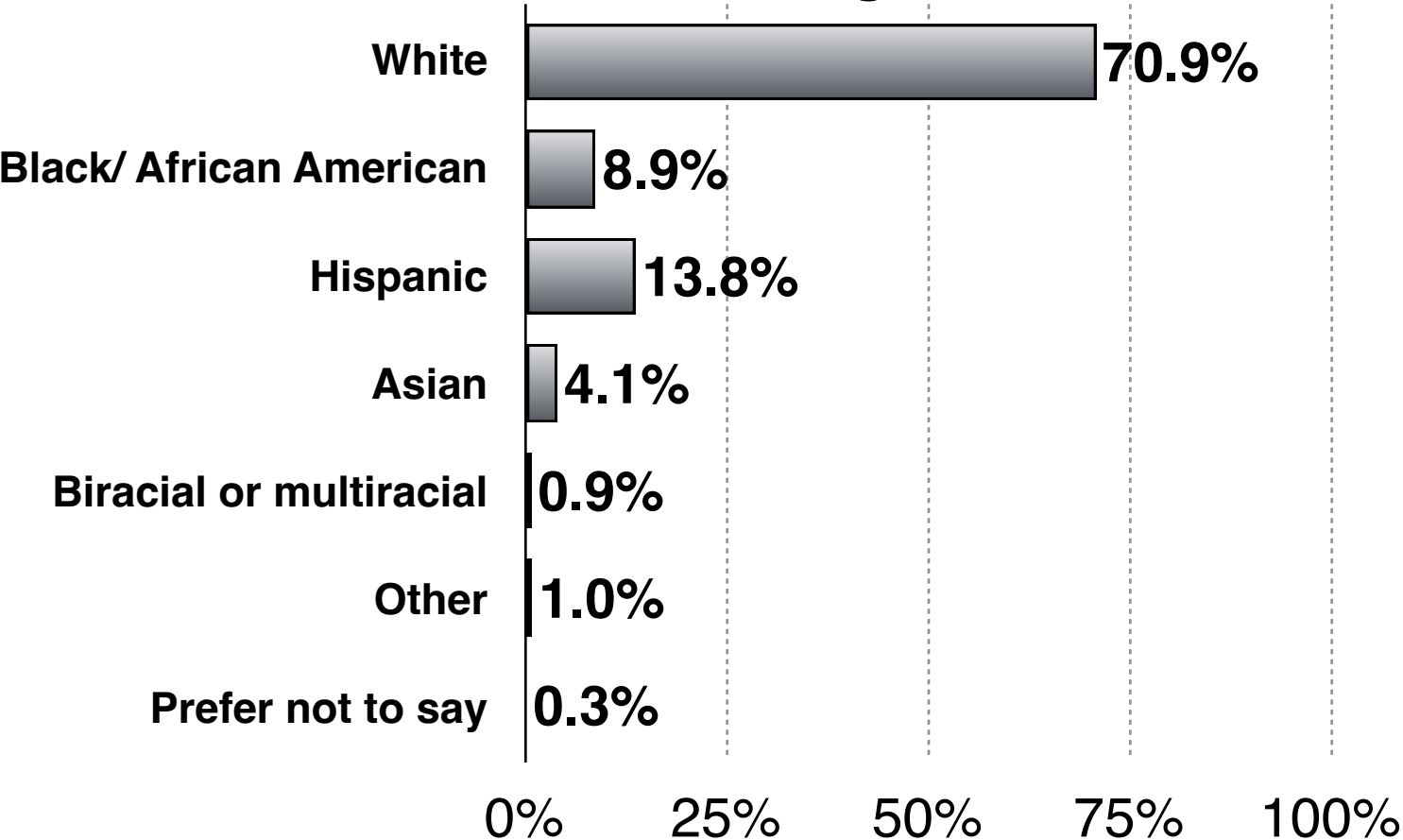
Age



Children Under Age 18

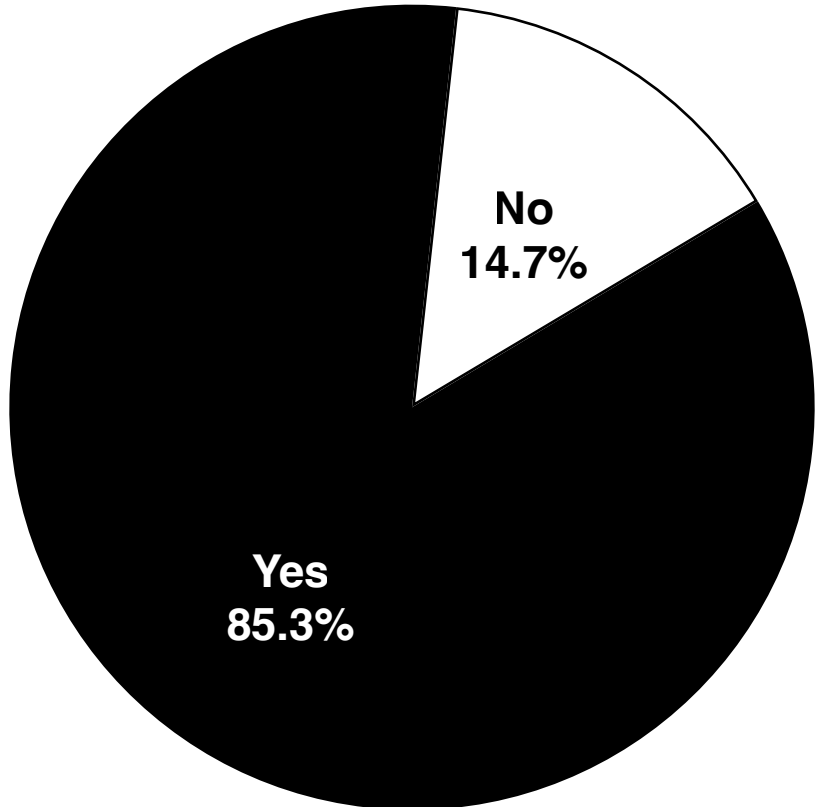


Ethnicity

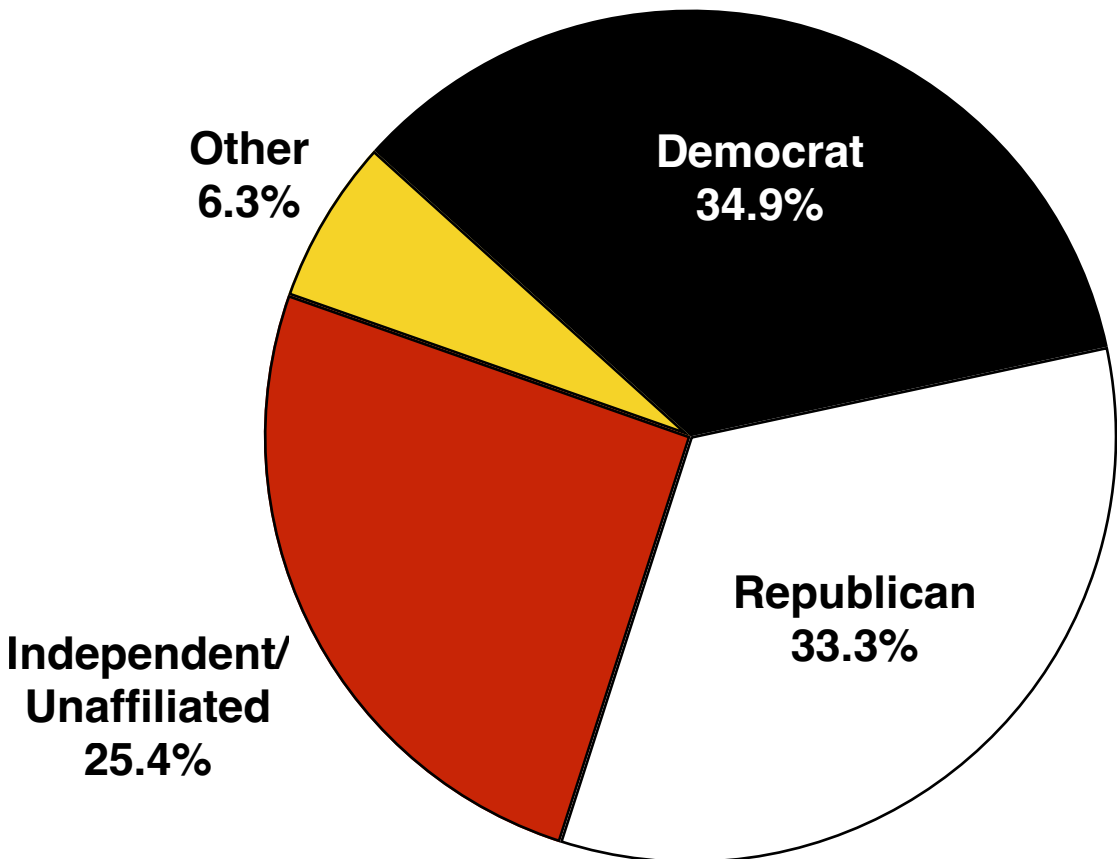


Political Profile | December 2023

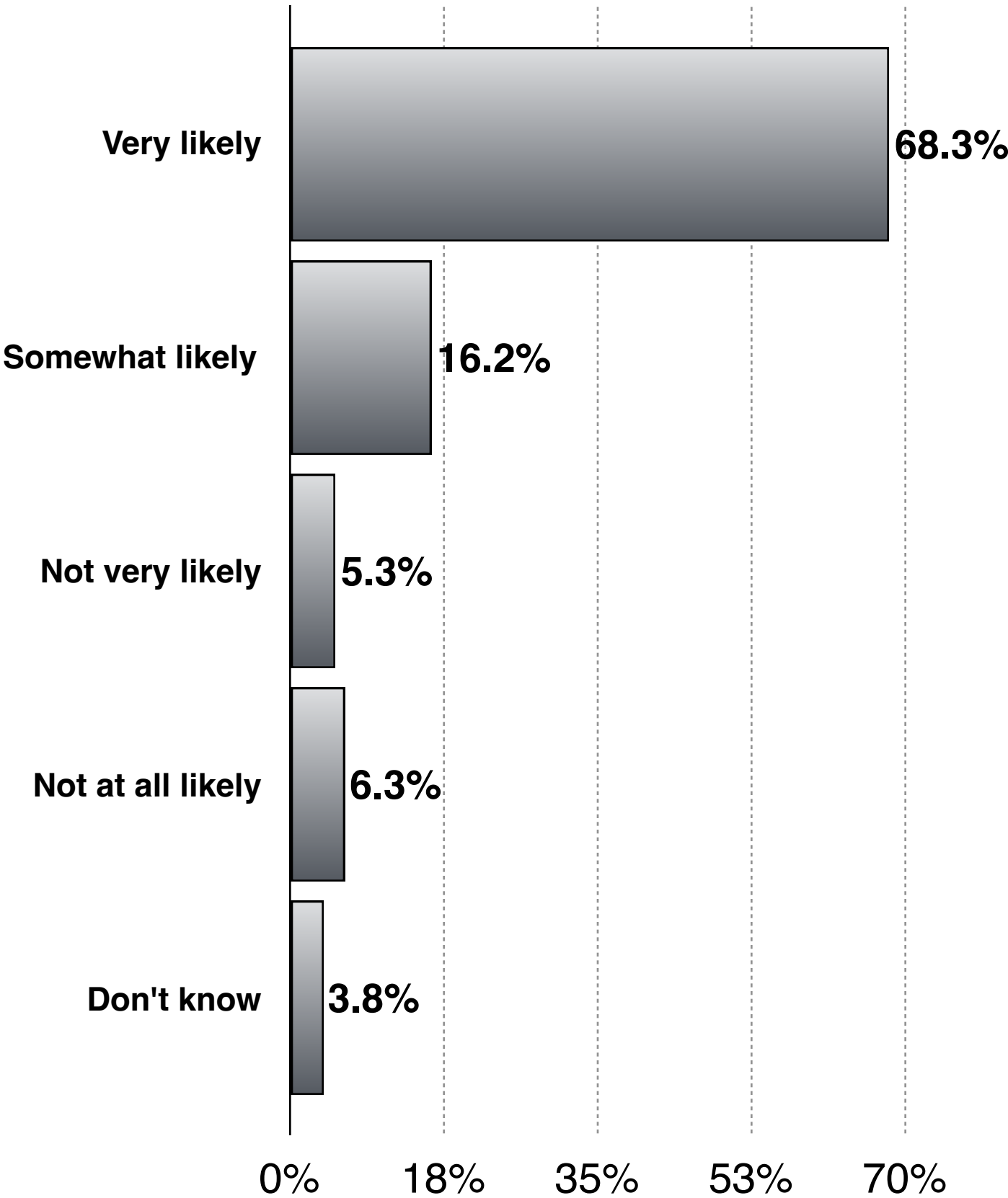
Voter Registration



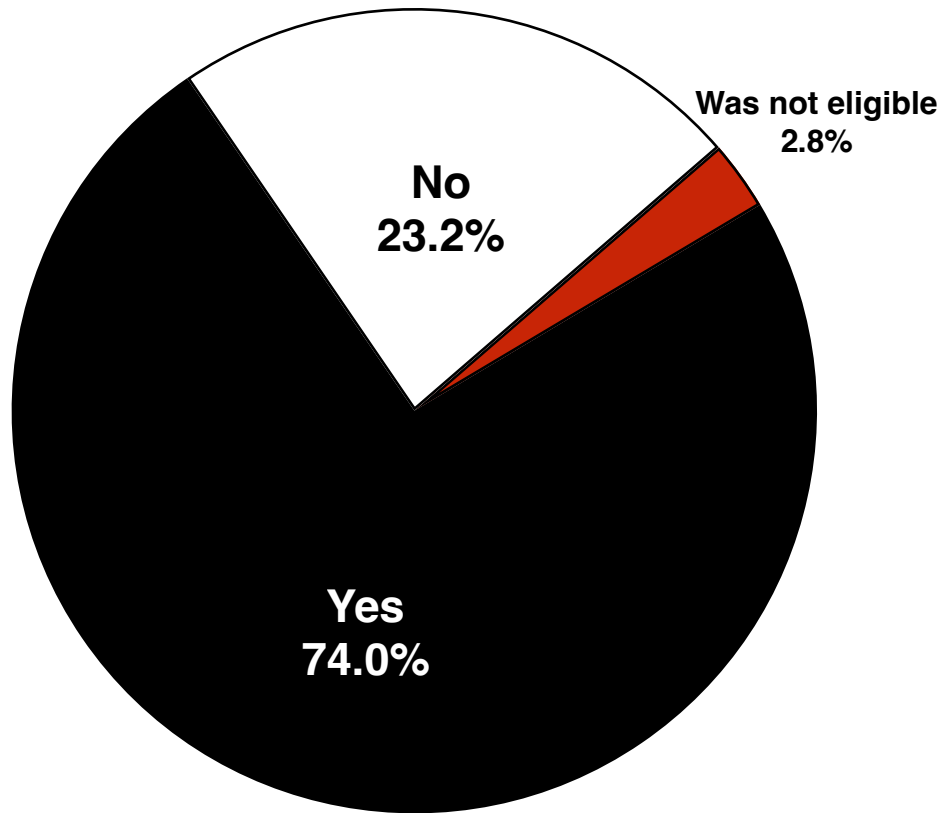
Political Party



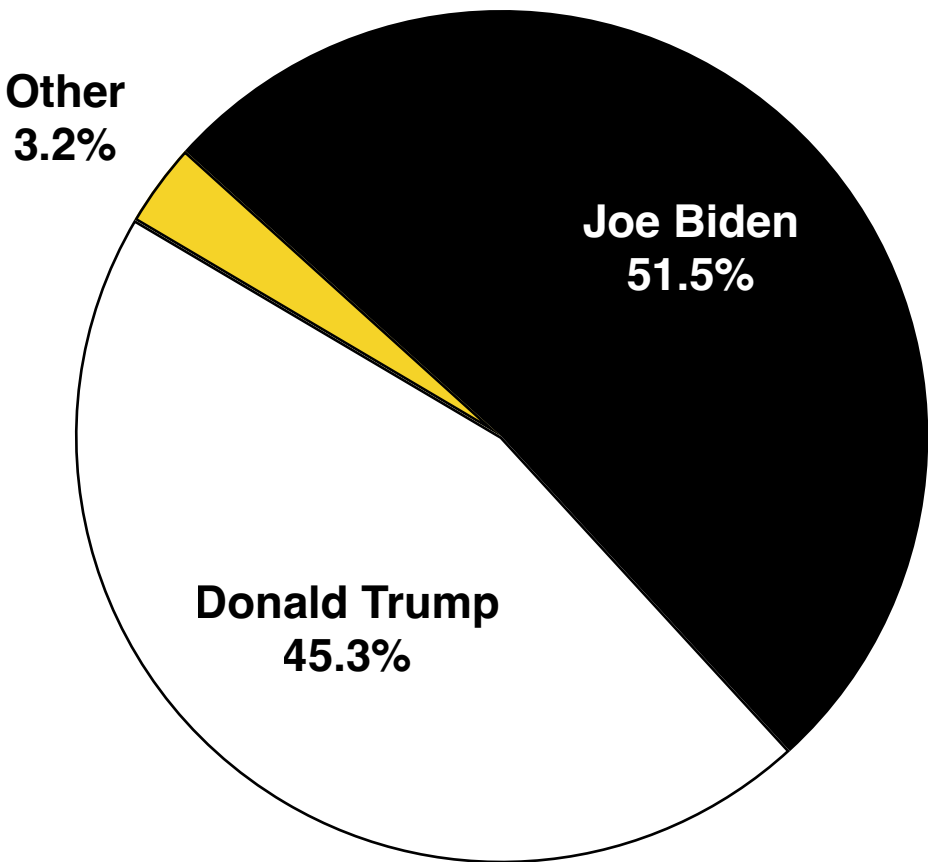
2024 Likelihood to Vote



2020 Vote



2020 Presidential Vote



Demographic Profile | December 2023

State of Residence	%
Alabama	1.0
Alaska	0.2
Arizona	3.7
Arkansas	1.1
California	9.4
Colorado	2.9
Connecticut	1.0
Delaware	0.5
Florida	8.3
Georgia	3.7
Hawaii	0.2
Idaho	0.7
Illinois	4.0
Indiana	2.3
Iowa	0.7
Kansas	0.8
Kentucky	2.4

State of Residence	%
Louisiana	1.0
Maine	0.4
Maryland	1.7
Massachusetts	1.4
Michigan	3.3
Minnesota	0.6
Mississippi	0.8
Missouri	1.3
Montana	0.3
Nebraska	0.4
Nevada	1.4
New Hampshire	0.2
New Jersey	2.3
New Mexico	0.7
New York	5.9
North Carolina	3.3
North Dakota	0.3

State of Residence	%
Ohio	3.9
Oklahoma	1.2
Oregon	0.9
Pennsylvania	5.3
Rhode Island	0.4
South Carolina	1.3
South Dakota	0.2
Tennessee	2.3
Texas	7.8
Utah	0.6
Vermont	0.3
Virginia	2.8
Washington	2.3
Washington, D C	0.3
West Virginia	0.6
Wisconsin	1.5
Wyoming	0.1



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