Health Policy Update

September 2019
Healthcare expenditures in the U.S. are significantly higher than those of other developed countries.

**National Health Spending (% of GDP)**

- Spain: 8.9%
- United Kingdom: 9.8%
- Norway: 10.2%
- Canada: 10.7%
- Japan: 10.9%
- France: 11.2%
- Germany: 11.2%
- Switzerland: 12.2%
- United States: 16.9%
- OECD Average: 8.8%

**Source:** Organisation for Economic Co-operation and Development, OECD Health Statistics 2019, July 2019.

**Note:** Data are for 2018.

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The State of Play
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Net Consumer Sentiment Of United States Industries (June 2019)

<table>
<thead>
<tr>
<th>Industry</th>
<th>June 2019</th>
<th>May 2019</th>
<th>April 2019</th>
<th>sentiment</th>
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</thead>
<tbody>
<tr>
<td>Aline industry</td>
<td>42</td>
<td>32</td>
<td>23</td>
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<tr>
<td>Telephonie industry</td>
<td>42</td>
<td>32</td>
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<td>+6</td>
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<td>Publishing industry</td>
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<td>36</td>
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<td>+5</td>
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<td>Education</td>
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<tr>
<td>Television and radio industry</td>
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<td>+5</td>
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<td>Oil and gas industry</td>
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<td>Advertising and public relations industry</td>
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<td>32</td>
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<td>-1</td>
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<tr>
<td>Healthcare industry</td>
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<td>14</td>
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<td>The federal government</td>
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<tr>
<td>Pharmaceutical industry</td>
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<td>15</td>
<td>58</td>
<td>-31</td>
</tr>
</tbody>
</table>

GALLUP, 1-14, 2019
Washington’s To Do List

- Interoperability Regulations
  - TEFCA
- Price Transparency
- Consumer Privacy
- Surprise Billing
- Prescription Drug Pricing
A health IT developer must provide assurances to the Secretary (unless for reasonable and necessary activities identified by the Secretary) that it will not take any action that constitutes information blocking or any other action that may inhibit the appropriate exchange, access, and use of electronic health information (EHI).

- A health IT developer must ensure that its certified health IT conforms to the full scope of the applicable certification criteria.
- Health IT developers must allow health information from their systems to be accessed, exchanged, and used through the use of API – application programming interface.
Healthcare  
Price  
Transparency  

NEARLY ALL CONSUMERS WANT HEALTHCARE COST INFORMATION.

Almost half of those consumers want it for financial planning purposes; very few use the information to price shop for a different provider.

91% → 46%

of consumers would like pricing information from providers in advance of care.

of cost-conscious consumers want healthcare cost information "to plan/budget for my out-of-pocket expenses – but it does not typically affect where or when I choose to receive services."
Consumer Privacy – Health Care Implications
Surprise Billing
Prescription drug costs have increased significantly over the past several decades.

**Total Prescription Drug Expenditures (Billions of Dollars)**

- **Actual**
- **Projected**

SOURCE: Centers for Medicare & Medicaid, National Health Expenditures, February 2018. Compiled by PCPF.

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What Is Going To Happen