

## CONSUMER HARM

Arizona residents experience considerable HARM from poor healthcare value.



## CONCERNED ABOUT COSTS

- 8% Delay getting needed care
- 14% Forego getting needed care



## LESS MONEY FOR HOUSING AND FOOD

- 22% Struggle to pay medical bills
- 24% Have past-due medical debt



## HEALTHCARE SPENDING GROWTH EXCEEDS GDP

Healthcare consumes an ever larger portion of wages, resulting in lower take-home pay.



## MIDDLE/LOWER-INCOME FAMILIES HIT HARDEST

Lower-income workers may spend up to 20% of their income on premiums vs. 3% for highest income bracket.

## HEALTHCARE SPENDING DRIVERS



**RIISING UNIT PRICES** are our biggest problem, responsible for most spending growth.



**WASTE** accounts for roughly 30% of medical spending—includes unnecessary services, excess administrative costs, inefficient care delivery, etc.



**CHRONIC DISEASE** prevalence is rising, but cost per case is more concerning.

## ARIZONA'S PATH FORWARD



## RIISING UNIT PRICES

## Consider:

- Price and quality transparency, particularly for providers
- Anti-price gouging authority
- Multi-payer rate setting
- Global budgets



## WASTE IN THE SYSTEM

## Consider:

- Patient shared decision making
- Provider payment reform



## PERSONAL &amp; SOCIAL DETERMINANTS OF HEALTH

## Consider:

- Environmental nudges
- Social-medical models of care



## STATE INFRASTRUCTURE TO SUPPORT SUCCESS

## Consider:

- All-payer claims database
- Comprehensive plan
- Multi-stakeholder collaboration

## DON'T DELAY



On a bipartisan basis, affording healthcare is a top financial concern for consumers.