Introduction and Methodology

• The Physicians Foundation commissioned Regina Corso Consulting to conduct a survey of healthcare consumers to evaluate their attitudes on four major areas – the physician-patient relationship, the cost of healthcare, social determinants and lifestyle issues.

• This survey was conducted among 1,747 U.S. respondents who are between the ages of 27 and 75 and have seen the same doctor at least twice in the past 12 months.

• This survey was conducted online between June 19 and 30, 2017.

• Notes for reading charts and tables: if a chart or table has an “*” – that indicates the response was less than 0.5%. If it has an “—” – that indicates there was no response. Percentages may not add up to 100% due to rounding. Unless otherwise indicated, bases for all slides are 1,747 healthcare consumers.

• Data are weighted by age, income, gender and region to reflect a nationally representative sample of U.S. residents between the ages of 27 and 75.

• Data from physicians are based on The Physicians Foundation 2016 Survey of America’s Physicians conducted by Merritt Hawkins in September 2016.

• Data reported from patients in 2016 are based on The Physicians Foundation 2016 Patient Survey conducted by Harris Poll, a Nielsen company, in February 2016.
Q1: Thinking of your primary doctor, how satisfied are you with your overall relationship with that doctor? Please think of the doctor who you consider your primary doctor, even if he or she is not your Primary Care Physician.

- Very satisfied: 64%
- Somewhat satisfied: 31%
- Not that satisfied: 4%
- Not at all satisfied: 1%
Q2: How often if at all, have you thought about changing your primary doctor?

- All the time: 5%
- Often: 15%
- Not that much: 36%
- Not at all: 44%
Q3: You mentioned you thought about changing your primary doctor. Why have you thought this?

- Three in ten of those who have thought of changing their primary physician (29%) say it is because of service issues.
  - 6% each say it is because the doctor does not do enough, because they do not listen to them, or does not provide enough personal service.

- One quarter of those who have thought of changing their primary physician (24%) say it is because of convenience.
  - 13% say it is because of location and/or distance
  - 4% say it is because of slow service or the wait time is too long
  - 3% say it is hard to get appointments

- 6% of those who thought of changing their primary physician say it is because they want a second option and because they found a better physician.
Q4: Overall, do you believe physicians are...? Among physicians – Which of the following best describes your current practice?
Q5: And, what best describes the time that physicians are able to spend with patients? Among physicians – Which best describes the time you are able to spend with patients?

<table>
<thead>
<tr>
<th>Time Description</th>
<th>Consumers</th>
<th>Physicians</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time is always limited</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>Time is often limited</td>
<td>37%</td>
<td>33%</td>
</tr>
<tr>
<td>Time is sometimes limited</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>Generally have all the time they need</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Q6: How much ability do physicians have to significantly influence the healthcare system? Among physicians – How much ability to physicians have to significantly influence the healthcare system?

- A great deal: Consumers 13%, Physicians 5%
- A good deal: Consumers 26%, Physicians 12%
- Somewhat: Consumers 31%, Physicians 24%
- Little: Consumers 30%, Physicians 20%
- Very little: Consumers 11%, Physicians 29%

Consumers vs. Physicians
Q7: Overall, thinking about treatment options for medical conditions, please tell how much each group, as a whole, impacts treatment options available to patients?

Health insurance companies: 2017 - 83%, 2016 - 92%
Pharmaceutical and medical device companies: 2017 - 68%, 2016 - 84%
Congress: 2017 - 60%, 2016 - 77%
Physicians: 2017 - 74%, 2016 - 79%
State government: 2017 - 54%, 2016 - 72%

Please note in 2016, Congress was the federal legislature and State Governments was State legislatures.
Q7: Overall, thinking about treatment options for medical conditions, please tell how much each group, as a whole, impacts treatment options available to patients?

<table>
<thead>
<tr>
<th>Group</th>
<th>Some/A Lot</th>
<th>A Lot</th>
<th>Some</th>
<th>Not at all/A little</th>
<th>A Little</th>
<th>Not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health insurance companies</td>
<td>92</td>
<td>69</td>
<td>23</td>
<td>8</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>Pharmaceutical and medical device companies</td>
<td>84</td>
<td>49</td>
<td>35</td>
<td>16</td>
<td>14</td>
<td>3</td>
</tr>
<tr>
<td>Congress</td>
<td>77</td>
<td>41</td>
<td>36</td>
<td>23</td>
<td>16</td>
<td>7</td>
</tr>
<tr>
<td>Physicians</td>
<td>74</td>
<td>31</td>
<td>42</td>
<td>26</td>
<td>23</td>
<td>3</td>
</tr>
<tr>
<td>State government</td>
<td>72</td>
<td>31</td>
<td>41</td>
<td>28</td>
<td>22</td>
<td>6</td>
</tr>
</tbody>
</table>
Q8: To what degree is patient care today adversely impacted by external factors such as third party authorization, treatment protocols, Electronic Health Record designs, etc.? Among Physicians – To what degree is patient care in your practice adversely impacted by external factors such as third party authorizations, treatment protocols, EHR design, etc.?

- A great degree: 24% Consumers, 39% Physicians
- A good deal: 36% Consumers, 33% Physicians
- Somewhat: 31% Consumers, 18% Physicians
- Little: 8% Consumers, 8% Physicians
- Not at all: 1% Consumers, 2% Physicians
Q9: Patients can often access their electronic medical records, also known as EMRs, through a portal over the internet.

- Do you think all doctors should provide access to their EMR? 82% in 2017, 85% in 2016
- Should all of your doctors have access to your EMR? 79% in 2017, 78% in 2016
- Does your doctor provide you access to your electronic medical records or electronic health records? 66% in 2017, 77% in 2016
- Do you think EMRs will improve the quality of healthcare in general? 67% in 2017, 74% in 2016
- Do you think EMRs will improve the quality of healthcare for you? 65% in 2017, 73% in 2016

% saying Yes
Q10: Do you believe Electronic Medical Records...?

- 42% Helps patient care a great deal
- 43% Helps patient care somewhat
- 6% Hurts patient care somewhat
- 2% Hurts patient care a great deal
- 7% Not at all sure
Q11: How strongly do you agree or disagree with the following statements?

- Technological advances in healthcare will greatly improve the quality of care patients receive: 85%
- I wish doctors would listen more: 77%
- The reliance on technology can interfere with high quality care: 59%
- Physicians rely more on what the computer screen tells them and less on what the patient tells them during the exams: 57%
- My doctor spends more time looking at his/her computer/tablet and less time looking at me now: 46%
Q12: How strongly do you believe doctors advocate for their patients?

- 60% advocate somewhat
- 19% strongly advocate
- 18% do not advocate that much
- 3% do not advocate at all
Q13: How strongly do you believe doctors should advocate for their patients?

- Should be a strong advocate: 67%
- Should advocate somewhat: 29%
- Should not advocate that much: 3%
- Should not advocate at all: 1%
Q14: If a child came to you for career advice and said they wanted to become a physician, would you…?

Among physicians, just half (51%) would recommend medicine as a career to their children or other young people.
Q15: How strongly do you agree or disagree with the following statements?

- I am concerned about how much healthcare costs will affect me in the future: 89%
- While the ACA is not perfect, healthcare reform was needed: 79%
- Instead of repealing the current healthcare system, politicians in Washington should just try and make it better: 78%
- Sometimes I feel like I'm one sickness away from being in serious financial trouble: 57%
- The government should repeal the Affordable Care Act in its entirety: 49%
- The government should repeal Obamacare in its entirety: 48%
Q15: How strongly do you agree or disagree with the following statements?

- I am concerned about how much healthcare costs will affect me in the future:
  - 2016: 49%
  - 2017: 79%
  - % saying Strongly/Somewhat Agree

- While the ACA is not perfect, healthcare reform was needed:
  - 2016: 54%
  - 2017: 75%
  - % saying Strongly/Somewhat Agree

- The government should repeal the Affordable Care Act in its entirety:
  - 2016: 89%
  - 2017: 91%
  - % saying Strongly/Somewhat Agree
Q16: Now, please think about the costs of healthcare. To what extent are you concerned or not concerned with your ability to pay for any medical treatment if you were to get sick or injured?

<table>
<thead>
<tr>
<th>Concern Level</th>
<th>Very Concerned</th>
<th>Somewhat Concerned</th>
<th>Somewhat Unconcerned</th>
<th>Not at All Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>28%</td>
<td>34%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>2017</td>
<td>35%</td>
<td>40%</td>
<td>16%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Q17: Do you have any debt because of medical costs?

- Yes: 33% in 2016, 29% in 2017
- No: 67% in 2016, 71% in 2017
Q18: How much debt do you have?

- 31% have less than $1,000
- 39% have between $1,000 and $4,999
- 18% have between $5,000 and $10,000
- 12% have more than $10,000

(Base: Have medical debt, N=505)
Q19: During the past 12 months, was there a time when you...?

- Had a medical problem and it took a long time to diagnose: 27% (2016), 28% (2017)
- Had a medical problem but did not visit a doctor because of the cost: 28% (2016), 28% (2017)
- Skipped a medical test, treatment, or follow-up that was recommended by a doctor because of the cost: 26% (2016), 28% (2017)
- Did not fill a prescription for medicine because of the cost: 27% (2016), 25% (2017)
- Skipped doses of your medicine because of the cost: 18% (2016), 19% (2017)
Q20: What are the top three factors that contribute to rising healthcare costs?

- Cost of pharmaceuticals/cost of prescription drugs: 56%
- Absence of free markets: 24%
- Fraud: 23%
- Physician fees: 22%
- Aging population: 22%
- State and federal insurance mandates: 21%
- Lack of pricing transparency: 20%
- Price controls on fees and products: 20%
- Social conditions: 20%
- Defensive medicine: 15%
- Advances in technology/treatment: 12%
- Fee-for-service reimbursement: 9%
- End-of-life care: 9%
- Limited patient financial obligations: 7%
- Other: 6%
Q20: What are the top three factors that contribute to rising healthcare costs?

<table>
<thead>
<tr>
<th>Factor</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of pharmaceuticals/cost of prescription drugs</td>
<td>59%</td>
<td>56%</td>
</tr>
<tr>
<td>Absence of free markets (lack of open competition between multiple parties to provide services at the lowest cost)</td>
<td>15%</td>
<td>24%</td>
</tr>
<tr>
<td>Fraud</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Physician fees</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Aging population</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>State and federal mandates (the requirement to have health insurance or pay a tax or fine if you do not)</td>
<td>26%</td>
<td>21%</td>
</tr>
<tr>
<td>Lack of pricing transparency (patients not having available information on the cost of prescriptions or medical tests or procedures in advance to help with healthcare decisions)</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Price controls on fees and products (Government intervention to control costs)</td>
<td>16%</td>
<td>20%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social conditions (poverty, drugs, violence, illegal immigration, etc.)</td>
<td>28%</td>
<td>20%</td>
</tr>
<tr>
<td>Defensive medicine (prescribing medications, procedures, or tests to avoid possible lawsuits rather than out of medical need)</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Advances in technology/treatment</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Fee-for-service reimbursement (The prevailing system where medical fees are paid based on services provided to each patient)</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>End-of-life care (Medical care for those who are terminally ill or have an incurable disease and are approaching the end of their life)</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Limited patient financial obligations (limitations to the amount patients must pay out of pocket)</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Q21: Experts have tied healthcare costs to poverty. What impact do you believe poverty has on healthcare costs?

- **39%** Extreme impact
- **29%** Large impact
- **18%** Some
- **10%** Little
- **6%** Not at all

Percentage of Consumers and Physicians: [Bar chart image]
Q22: How strongly do you agree or disagree with the following statements?

- Rich or poor, a healthy lifestyle will lead to having a better quality of health: 90%
- Pharmaceutical companies and the way they price drugs is a main reason for high healthcare costs: 88%
- Hospitals, clinics and doctors should look beyond their patients' medical needs to see if underlying causes are interfering with health issues: 86%
- Poverty, income inequality, and inadequate social services are a significant reason for America's high healthcare spending: 74%
- Poverty is associated with a higher demand for healthcare: 71%
Q22: How strongly do you agree or disagree with the following statements?

- Since hospitals have to treat everyone, being in poverty is no excuse for not being healthy: 56% saying Strongly/Somewhat Agree
- The U.S. does not have the resources to provide equitable, cost-effective care for those in poverty: 46% saying Strongly/Somewhat Agree
- High healthcare spending in the U.S. is mainly due to physicians and the way they practice: 45% saying Strongly/Somewhat Agree
- It's not the job of the physician to go beyond health issues when caring for their patient: 38% saying Strongly/Somewhat Agree
Q22: How strongly do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th></th>
<th>Agree (NET)</th>
<th>Strongly agree</th>
<th>Somewhat Agree</th>
<th>Disagree (NET)</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rich or poor, a healthy lifestyle will lead to having a better quality of health</td>
<td>90%</td>
<td>52%</td>
<td>38%</td>
<td>10%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Pharmaceutical companies and the way they price drugs is a main reason for high healthcare costs</td>
<td>88%</td>
<td>45%</td>
<td>43%</td>
<td>12%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Hospitals, clinics and physicians should look beyond their patients’ medical needs to see if underlying causes are interfering with health issues</td>
<td>86%</td>
<td>31%</td>
<td>56%</td>
<td>14%</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Poverty, income inequality and inadequate social services are a significant reason for America’s high healthcare spending</td>
<td>74%</td>
<td>25%</td>
<td>49%</td>
<td>26%</td>
<td>20%</td>
<td>6%</td>
</tr>
<tr>
<td>Poverty is associated with a higher demand for healthcare</td>
<td>71%</td>
<td>23%</td>
<td>48%</td>
<td>29%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Since hospitals have to treat everyone, being in poverty is no excuse for not being healthy</td>
<td>56%</td>
<td>19%</td>
<td>38%</td>
<td>44%</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>The U.S. does not have the resources to provide equitable, cost-effective care for those in poverty</td>
<td>46%</td>
<td>16%</td>
<td>31%</td>
<td>54%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>High healthcare spending in the U.S. is mainly due to physicians and the way they practice</td>
<td>45%</td>
<td>11%</td>
<td>34%</td>
<td>55%</td>
<td>40%</td>
<td>15%</td>
</tr>
<tr>
<td>It’s not the job of the doctor to go beyond health issues when caring for their patients.</td>
<td>38%</td>
<td>11%</td>
<td>28%</td>
<td>62%</td>
<td>41%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Q23: How important is it for a medical professional to know the following things about their patients?

- Behavioral and/or mental health issues, such as stress, anxiety, depression or trauma: 95%
- Health behaviors, such as tobacco, alcohol or substance abuse, lack of physical activity and/or poor diet: 95%
- Food issues, such as having limited or uncertain access to adequate and nutritious food: 92%
- Violence issues, such as exposure to domestic violence, elder abuse, or community violence: 92%
- Social isolation issues, such as lack of family and/or friends and absence of social engagements: 81%

% saying Very/Somewhat Important
Q23: How important is it for a medical professional to know the following things about their patients?

- Financial resource issues, such as trying to find public/federal/charity funds or being denied benefits: 78%
- Housing issues, such as if they are in danger of being or are homeless, struggling to pay rent/mortgage or have frequent housing disruptions: 78%
- Transportation issues, such as difficulty getting to work, school or doctors' offices: 71%
- Employment issues, such as under-employment and/or unemployment: 71%
- Utility issues, such as difficulty paying their electric or phone bills: 60%
Q24: In general, would you say your health is...?

- Excellent: 9% (2016) vs. 9% (2017)
- Very good: 32% (2016) vs. 30% (2017)
- Good: 38% (2016) vs. 40% (2017)
- Fair: 18% (2016) vs. 17% (2017)
- Poor: 4% (2016) vs. 3% (2017)
Q25: Which of the following do you do? Please select all that apply. Also, please remember that your answers are completely anonymous.
Q26: When it comes to exercise, how often do you usually do it?

- Daily: 13%
- 4-6 times a week: 25%
- 2-3 times a week: 28%
- Once a week: 8%
- A few times a month or less: 10%
- I rarely exercise: 17%
Q27: Which is closest to how you eat?

- 12%: I always eat healthy, having lots of fresh fruit and vegetables and whole grains
- 61%: I try to eat healthy most of the time, but have some fun in my diet as well
- 22%: I don't usually eat healthy, but do try and make an effort every now and then
- 4%: I rarely eat healthy
Q28: Which is closest to what you tell your doctor about your lifestyle?
Q29: When it comes to healthcare, which is more important?

- Implementing social programs to help those in poverty have better access to health care: 45%
- Changing how doctors practice and treat patients: 27%
- Not at all sure: 28%
Q30: While all of these may be important, which one would you say is most important to the future of healthcare delivery and which one is least important?

<table>
<thead>
<tr>
<th>Most Important</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring patients and physicians are truly partners in care</td>
<td>36%</td>
</tr>
<tr>
<td>Having the physician be the main decision maker when it comes to care</td>
<td>21%</td>
</tr>
<tr>
<td>Ensuring healthcare stakeholders work together to make the healthcare system easier to understand</td>
<td>17%</td>
</tr>
<tr>
<td>Recognizing the effects of poverty on healthcare costs</td>
<td>15%</td>
</tr>
<tr>
<td>Other healthcare professionals need to provide support to physicians so their quality of life doesn't impact their quality of care</td>
<td>12%</td>
</tr>
</tbody>
</table>
Q30: While all of these may be important, which one would you say is most important to the future of healthcare delivery and which one is least important?

- 25% Having the physician be the main decision maker when it comes to care
- 23% Recognizing the effects of poverty on healthcare costs
- 22% Other healthcare professionals need to provide support to physicians so their quality of life doesn’t impact their quality of care
- 20% Ensuring healthcare stakeholders work together to make the healthcare system easier to understand
- 9% Ensuring patients and physicians are truly partners in care

Least important
Q31: How strongly do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>% saying Strongly/Somewhat Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>All healthcare stakeholders must work together to address challenges that make the current system difficult to understand</td>
<td>91%</td>
</tr>
<tr>
<td>Physicians and patients create a true partnership representing the most essential element of a quality healthcare system</td>
<td>90%</td>
</tr>
<tr>
<td>As leaders of patient care, the physicians voice must be front and center in discussions around healthcare access, cost and quality</td>
<td>90%</td>
</tr>
<tr>
<td>Physicians are patient advocates and play a vital part in providing quality and affordable healthcare</td>
<td>90%</td>
</tr>
</tbody>
</table>
Q31: How strongly do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
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</tr>
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<tbody>
<tr>
<td>Physicians require support from other healthcare professionals as they struggle to provide care under increased pressures of regulation, changing payment and insurance models and overall uncertainty</td>
<td>89%</td>
</tr>
<tr>
<td>Physicians are guardians of quality and must be recognized as the key decision maker for patient care</td>
<td>87%</td>
</tr>
<tr>
<td>In any reform or evolution of the healthcare system, it is critical to recognize the pervasive debilitating effects of poverty on healthcare costs</td>
<td>81%</td>
</tr>
</tbody>
</table>
Q31: How strongly do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree (NET)</th>
<th>Strongly agree</th>
<th>Somewhat Agree</th>
<th>Disagree (NET)</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
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</thead>
<tbody>
<tr>
<td>All healthcare stakeholders must work together to address challenges that make the current system difficult to understand</td>
<td>91</td>
<td>42</td>
<td>49</td>
<td>9</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Physicians and patients create a true partnership representing the most essential element of a quality healthcare system</td>
<td>90</td>
<td>46</td>
<td>45</td>
<td>10</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>As leaders of patient care, the physician’s voice must be front and center in discussions around healthcare access, cost and quality</td>
<td>90</td>
<td>41</td>
<td>49</td>
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<tr>
<td>Physicians are guardians of quality and must be recognized as the key decision maker for patient care</td>
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<td>37</td>
<td>50</td>
<td>14</td>
<td>11</td>
<td>3</td>
</tr>
<tr>
<td>In any reform or evolution of the healthcare system, it is critical to recognize the pervasive, debilitating effects of poverty on healthcare costs</td>
<td>81</td>
<td>33</td>
<td>49</td>
<td>19</td>
<td>17</td>
<td>2</td>
</tr>
</tbody>
</table>
Demographics

- When it comes to health insurance, 93% have it and 7% do not.
  - Of those who have health insurance, 50% have a plan purchased through an employer or union, 26% have it through Medicare, 10% through Medicaid or other state program, 9% through a plan they bought into on their own, 4% from TriCare, less than 1% from Alaska Native, Indian Health Service or Tribal Health Service and 2% from some other source

- For age, 20% are between 27-34, 23% between 35-44, 21% between 45-54, 21% between 55-64, and 16% between 65 and 75.

- Gender is divided with 49% male and 51% female

- Regionally, 20% are in the Northeast, 16% in the Midwest, 39% in the South and 25% in the West
  - For urbanicity, 49% are suburban, 32% urban and 19% rural
Demographics, continued

• Looking at employment, 50% are employed full time, 8% employed part-time and 5% are self-employed, 7% are not employed, 22% retired, 7% are homemakers and 1% students.

• In terms of income, 16% have a household income of less than $25,000, 19% between $25,000-$49,999, 39% between $50,000-$99,999, 16% between $100,000-$149,999 and 11% $150,000 and more.

• For education, 14% have a high school degree or less, 30% some college or an associate degree, 32% a bachelor degree or equivalent, 22% have a graduate degree.

• With regard to their family life, 61% are married, 24% are single, 10% are divorced, 4% are widowed, and 1% are separated

• And, for children, 36% have a child under the age of 18 in the household while 64% do not.