

# Path to Better Health Study

Exploring consumer and provider views about how health care transformation will affect the delivery of localized, personal health solutions.



 **CVS**  
Health<sup>®</sup>

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# Introduction

## Quickening pace of health care transformation points to local, digital future

The American health care system is undergoing significant transformation. The disparity between health care outcomes and costs is driving the shift from fee-for-service to fee-for-value, aligning payment with the quality of care consumers receive rather than the volume of patients a provider sees. And as we look to the future of health care, we must construct a system that prioritizes local, personal care. Easy-to-access, community-based health care will play a central role in providing affordable, coordinated and holistic care options that help people on their path to better health.

In 2018, Aetna, a CVS Health company, released the inaugural **Health Ambitions Study**, examining consumers' health goals and their relationships with providers. This year, we dig deeper with the **Path to Better Health Study**. We explore ways the industry can support healthier outcomes, simplify the consumer experience and challenge the status quo with new technologies, business models and integrated provider partnerships that work to make the health care system more effective and more affordable.

Our research finds that consumers' need to manage chronic health conditions is driving their health goals. Those goals are focused not only on achieving better outcomes at lower costs but also on attaining other aspects of well-being such as a greater sense of social connection. Millennials, for example, are the most likely to struggle with meeting new

people or developing relationships with others, underlining how their more transient way of life may be affecting their sense of well-being. To achieve their health ambitions, consumers of all generations are seeking more local, diversified support and are turning to their doctors, along with nurse practitioners, physician assistants and pharmacists for health advice and care.

The Path to Better Health Study points to a health care future that is local, more digital, and centered on helping consumers achieve better outcomes not just for physical health, but for total health.



**Larry Merlo**  
President and Chief Executive Officer,  
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# Whole Body Health Goals

## Chronic conditions drive consumer health goals

Consumers are establishing health goals focused around the top four chronic conditions they face today: obesity, mental illness, high blood pressure and diabetes. In fact, 42 percent of consumers say that they or someone in their household are struggling with obesity or other weight issues. Managing blood pressure is also a chief concern, especially for the older population, as 60 percent of Medicare eligibles (65+) report dealing with or knowing someone who has difficulty with managing high blood pressure.

Consumers are facing other challenges, as well. Thirty-nine percent report that they, or someone they know, have struggled with nicotine use in the last five years, and 36 percent say the same about managing chronic and acute pain.

It's well-understood that income influences health and longevity through various clinical, behavioral, social and environmental factors.<sup>1</sup> Our study further reinforces this correlation. Forty-six percent of consumers earning less than \$35,000 per year say they, or someone close to them, have struggled with nicotine use, compared to 34 percent earning \$75,000 or more. With pain

Consumers say they, or someone in their household, are struggling with the following chronic conditions:



42%

Obesity



40%

High Blood Pressure



32%

Mental Illness



20%

Diabetes



15%

Chronic Skin Condition



12%

Heart Disease



7%

Chronic Kidney Disease

## Managing chronic health conditions

More than half of American adults struggle with chronic health conditions such as diabetes, high blood pressure and cancer. One in four Americans are dealing with two or more of these diseases at once, presenting complex and often costly challenges for both patients and the broader health system.

Through our vast community touchpoints, like MinuteClinic and CVS Pharmacy, CVS Health is helping patients manage their conditions. For example, our [ScriptPath Prescription Schedule](#) tool helps patients keep track of and manage their multiple prescriptions with easy-to-understand icons and the creation of a personalized prescription schedule.

By providing these frequent touchpoints and convenient solutions, CVS Health is helping improve chronic disease care outcomes and reduce costs.

<sup>1</sup> Chetty R, Stephner M, Abraham S, et al. The Association Between Incomes and Life Expectancy in the United States, 2001-2014. JAMA. 2016;315(16):1750-1766.

management, 40 percent of those earning less than \$35,000 per year struggle the most, compared to 28 percent earning \$75,000 or more.

Overall, consumers are most likely to establish health goals related to eating habits (59 percent), fitness (47 percent), better sleep (45 percent), stress reduction (43 percent) and improving mental health (36 percent). Most consumers say these goals are designed to raise their overall quality of life (95 percent) and live longer (89 percent). But millennials say they are primarily motivated by cultivating and maintaining relationships with friends and family. Approximately three-fourths (74 percent) cite this as a top reason, compared to 57 percent of those 65 or older.

Most consumers (60 percent) are also actively talking to their primary care physician (PCP) about their health goals, and more than half (55 percent) say their doctor always or often asks them about their goals. However, providers have a different perspective, with just 30 percent saying most or all of their patients bring up health goals with them.

## **Social isolation, mental health and alcohol use impacting millennials**

When it comes to their health, consumers generally rate themselves

highly across the **six dimensions of well-being**: financial health, physical health, emotional health, social connectedness, sense of purpose and character strengths. For example, 63 percent of consumers rate themselves as good or excellent for having a sense of purpose and being socially connected, while 62 percent say the same when it comes to their emotional health.

There is a clear concern about social isolation among millennials. More than half (53 percent) say they don't know where to go to meet new people, compared to just 27 percent of those 65 or older. Forty-eight percent also say they no longer have a desire to be social, compared to 20 percent of older consumers.

## **Be the first tobacco-free generation**

About 3.6 million middle and high school students use e-cigarettes, a drastic increase from 1.5 million students the previous year, according to the [2018 National Youth Tobacco Survey](#). Compounding this problem, research shows that young people who vape are four times more likely to begin smoking in the future.

That's why CVS Health and its charitable foundations just announced that they will award more than \$10 million in the aggregate in 2019 to support youth smoking and e-cigarette prevention strategies and education delivered in classrooms across the United States. This new commitment is part of the "[Be the First](#)" program, a five-year initiative to help deliver the nation's first tobacco-free generation. This initiative builds on CVS Health's longstanding commitment to tobacco cessation efforts, demonstrated by its groundbreaking decision to [stop selling tobacco products altogether](#) in September 2014.

Be the First includes comprehensive education, advocacy, tobacco control and healthy behavior programming in partnership with organizations uniquely positioned to tackle this public health challenge. These efforts can bring us one step closer to helping people lead tobacco-free lives.



**Tested to be Trusted.**

At CVS, truth is an important ingredient. That's why we demand third-party testing of all supplements to confirm they contain what they claim.

We partner with external industry experts to confirm the dietary supplements we sell contain the dietary ingredients and amounts reported on the label from specific heavy metals, pesticides, microbes, pathogens and other related contaminants and are produced in facilities that adhere to current FDA Good Manufacturing Practices.

The choices we make...make CVS® different.

Visit [CVS.com/Tested-Trusted](http://CVS.com/Tested-Trusted) to learn more.

Further to this point, research from the *U.S. Census Bureau* suggests this may be a result of their everchanging lifestyle.<sup>2</sup> According to this report, young adults aged 20-29 have the highest migration rate of any age group and may likely be the hardest hit by the Great Recession in 2008. This confluence of events seems to point to a millennial population that is less connected to their community either through employment or family and friends.

Women are facing specific challenges with their well-being, too. Overall, women (47 percent) are more likely to struggle or know someone struggling with obesity or other weight concerns than men (31 percent). More than one-third (36 percent) also say they or someone in their household is living with mental illness, compared to 23 percent of men. Men, meanwhile, are more likely to need greater social support. Forty-four percent of men say they no longer have friends or family nearby, compared to 30 percent of women. And 44 percent say they live somewhere that makes it inconvenient to be social, compared to 35 percent of women.

## Enhancing self-care

To further support people on their path to better health, CVS Health is expanding the self-care options in our CVS Pharmacy aisles, now including new vitamin and supplement testing standards and a wider assortment of products in new categories. Learn more about our “Tested to Be Trusted” program and how it’s helping customers make more informed wellness decisions [here](#).

**Millennials are more likely to have challenges with the following than older consumers (65+):**

	 Millennials	 Ages 65+
Don't know where to meet new people	53%	27%
Live in a place that makes it inconvenient to be social	48%	26%
No longer have a desire to be social	48%	20%
Struggle or know someone in their household struggling with mental illness	42%	8%
Struggle or know someone else struggling with alcohol use	35%	11%
Rate themselves as fair or poor in financial security	33%	27%

<sup>2</sup> Benetsky M, and Fields A. Millennial Migration: How has the Great Recession affected the migration of a cohort as it came of age? U.S. Census Bureau. 2015.

# Eliminating Barriers to Care and Supporting On-Demand Access

## The key to better patient outcomes: Supporting providers in enhancing digital capabilities

Providers as a whole say they're hampered in their ability to spend adequate time with patients by

administrative tasks, such as filling out electronic health records (EHRs) (41 percent) and required paperwork (35 percent). Nurse practitioners and physician assistants are struggling the most with EHRs, with 55 percent saying they need help, followed by general practitioners at 53 percent.

Meanwhile, pharmacists are the most challenged by administrative tasks (42 percent), followed by

general practitioners (36 percent) and specialists (33 percent). This suggests that providers will need greater support balancing digital adoption with direct patient care.

That's important, because providers who receive support implementing new technology are more likely to help their patients achieve better outcomes. For instance, providers using digital tools are more likely

## Helping providers in the digital space

To help doctors and other providers influence healthy behavior, Aetna, a CVS Health company, applies data analytics and advanced digital tools. Aetna's technology provides opportunities for earlier interventions and more connected care that yields higher quality health care and lower costs.

For example, the powerful new clinical platform, MedCompass, allows clinical teams to easily access important data such as lab results, pharmacy scripts, medical claims and member demographics to assist in supporting member health, closing care gaps and improving outcomes.

MinuteClinic also uses technology to ensure providers have all the information they need to help patients. MinuteClinic shared more than 7 million patient charts electronically in 2018 through Epic Care Everywhere and other Health Exchange Networks.

By integrating Aetna's medical information and analytics with CVS Health's pharmacy data, CVS Health's future system will provide a more complete picture of a member's health and engage consumers in their own total health and wellness.

to recommend health goals to their patients. Fifty-eight percent of providers who use patient portals always or often make health goal recommendations to their patients, while only 14 percent rarely or never make recommendations.

Providers who report using digital resources in their practices are also more likely to be satisfied with the amount of time they spend with their patients. A majority (62 percent) who use mobile apps are somewhat or very satisfied with the time spent

with patients, compared to 38 percent who are somewhat or very dissatisfied.

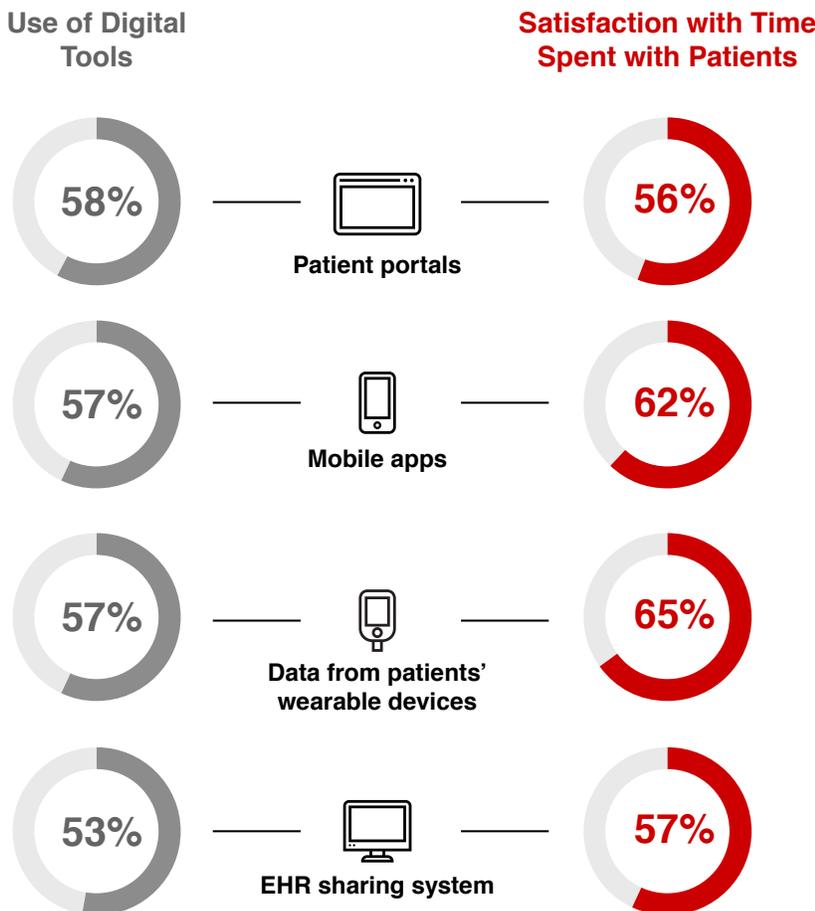
As a group, providers are adopting some – but not all – types of digital tools. Sixty-seven percent say they use EHR sharing systems, and 60 percent use patient portals. But only 29 percent say they incorporate information from their patients’ mobile apps into their care, with even fewer (17 percent) using data from wearable devices.

## Consumers say their top health care priorities are ease of access, affordability and cost, but desire to monitor personal health data is also growing

Cost (72 percent), ease of access (70 percent) and personalization (64 percent) are several top factors consumers cite as very important to their health care. Their desire to monitor personal health data is also growing, but they worry about the possibility of health information being compromised: 73 percent say privacy is very important, and 68 percent say the same about data security.

According to the study, patients generally believe their providers are meeting their holistic health care needs, with about two-thirds (67 percent) saying their doctor is excellent or very good at offering access to other health care professionals, and at taking time to understand the many factors that contribute to their health (66 percent). But a similar number of patients (64 percent) say their doctor has not talked to them about health care affordability. This lapse is especially prevalent among people 65 years or old (89 percent), and women (67 percent).

### Providers who successfully adopt digital tools are more satisfied with the time spent with patients:



## Supporting accessible, affordable care

The desire to monitor health data and have a health coach is increasing, particularly among millennials. Sixty-four percent say that monitoring their health apps or wearable devices and having access to a health coach (64 percent) are very or somewhat important to them, compared to just 52 percent and 42 percent of those 65 or older, respectively. Yet older consumers are most confident (73 percent) that their doctor is excellent or very good at taking time to review data from their personal health tracking apps and software. Overall, regardless of age, 64 percent of people feel that way.

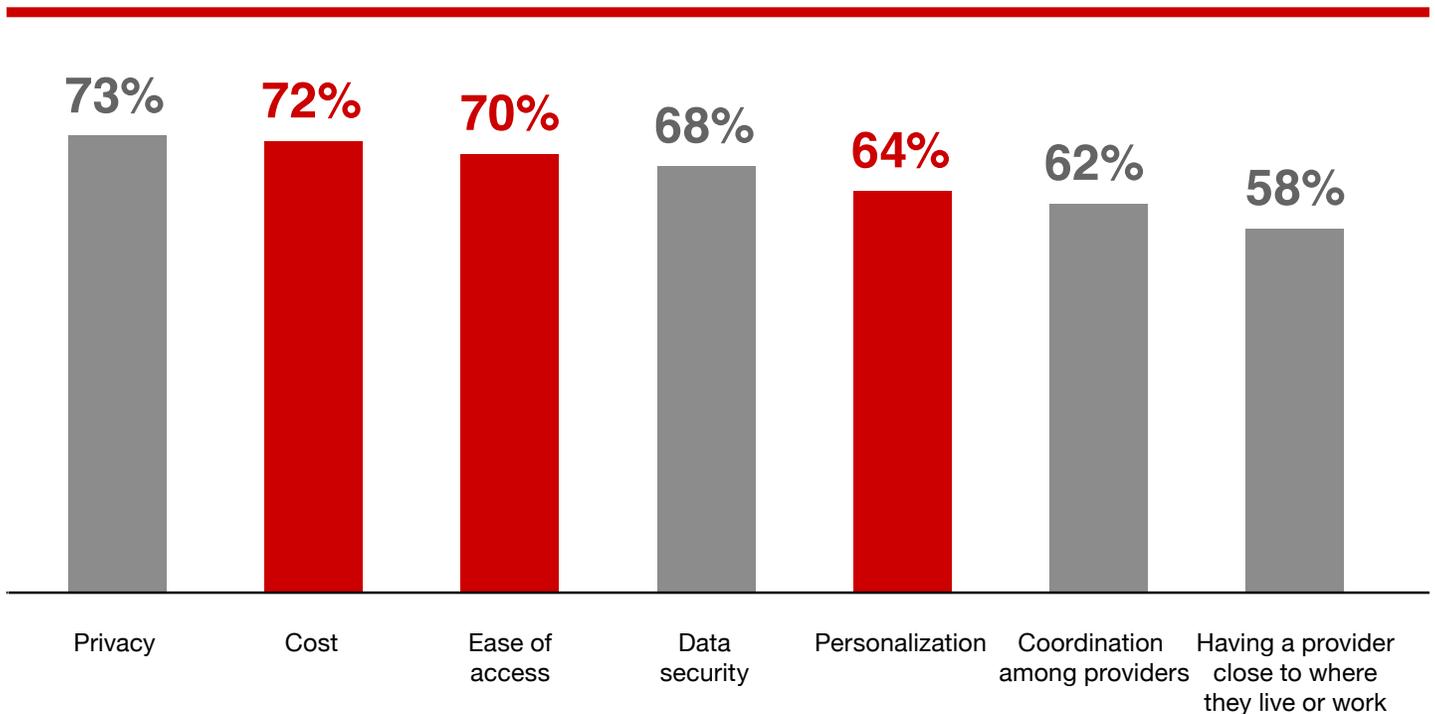
Patients deserve a health care experience that is easy-to-use, personalized and accessible. Unfortunately, the treatment plans for many common health conditions do not yet provide this.

For example, it can take months and multiple visits to different providers to diagnose sleep apnea. Each step — and delay — may prompt a patient to abandon the process before they can get the diagnosis or care they need.

That's why CVS Health is making the process simpler and faster. Our [streamlined solution](#), which is being piloted in three MinuteClinic locations, takes only about eight days.

Our aim is to make sleep apnea care more convenient and accessible, so patients can get the support they need, have a better experience and improve management of their condition and symptoms.

When it comes to their health care, consumers say the following factors are very important to them:



# Value-Based Care 2.0: Bringing Integrated Resources to Your Community

## Most consumers have a primary care physician, but sites of care are changing

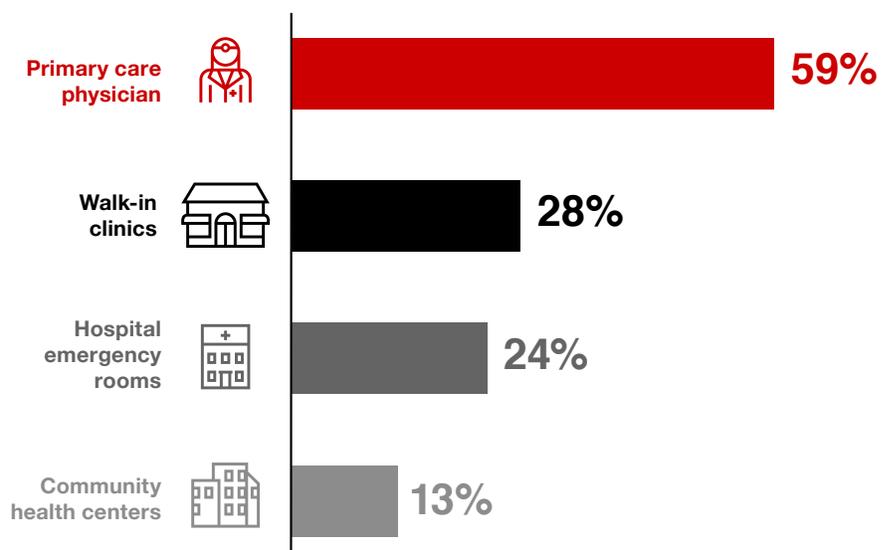
People are still principally turning to their primary care physician for their health care needs; more than 80 percent of consumers report having one. While most (59 percent) continue to visit their doctor for routine check-ups, injuries or illnesses, consumers are also turning to walk-in clinics (28 percent), hospital emergency rooms (24 percent) and community health centers (13 percent). Millennials are the least likely to have a primary care physician (27 percent) and are instead more frequently seeking care at a walk-in clinic (32 percent) or emergency room (31 percent).

People, particularly women (63 percent) and those 65 or older (79 percent), also still consider their primary care physician to be the

most trusted health care provider (60 percent). Three-fourths (75 percent) of consumers are very likely to take recommendations from their doctor, and 67 percent rate their physician as excellent or very good at being available to discuss their questions or concerns.

Nurse practitioners, physician assistants and pharmacists also are viewed as valuable and trustworthy resources — signaling the impact they could have amid a mounting shortage of physicians and urgent need to care for a growing senior population.<sup>3</sup> Eighty-five percent of

### Where are consumers receiving routine care for minor injuries or illnesses?



<sup>3</sup> Association of American Medical Colleges. The Complexities of Physician Support and Demand: Projections from 2017 to 2032. (Washington D.C.: HIS Markit Ltd., 2019).

## Partnering with trusted health care providers

Convenience and affordability are two important factors for patients to consider when choosing the site of their care. Our local presence in the community allows MinuteClinic and CVS Pharmacy to fill gaps in care and support a more connected health care system. While a patient might see a physician four or five times a year, they are likely to visit their local pharmacy as many as 18 to 24 times in the same year. These frequent interactions help patients stay on their care plans between doctor visits.

At our 1,100 MinuteClinics, patients receive high-quality medical care for common acute and chronic illnesses, in addition to wellness services like vaccinations, screenings, weight loss support and chronic disease monitoring. More than 3,000 nurse practitioners, physician assistants and other clinicians specializing in family health care administer these services seven days a week.

By sharing visit information with a patient's primary care physician (and recommending one when a patient doesn't already have a PCP), MinuteClinic practitioners ensure that a patient's care team has a complete view of the his or her prescription and medical records. This in turn, can help facilitate more informed health care decision-making.

Thousands of CVS Specialty, Accordant, CareTeam, and Aetna pharmacists and nurses also provide critical day-to-day clinical counseling and telephone support for both patients and prescribers. They are joined by our Coram CVS Specialty Infusion Services nurses, who teach patients how to use infused medications in hospitals and how to safely transition home. CVS Health and Aetna care team members are proud to be a critical partner for consumers as they work to achieve their health goals.

consumers say they would be very or somewhat likely to take health recommendations from a nurse, while 81 percent say the same for pharmacists.

Notably, nurse practitioners and physician assistants are the most likely (60 percent) to recommend that their patients set health goals — showing the crucial impact they could have in moving toward a personalized, holistic health system. They are trailed by specialists (55 percent), general practitioners (53 percent) and pharmacists (37 percent).



## Value-based care encompasses many providers

Most providers say they have heard of value-based care (67 percent) or their practice is highly or somewhat involved in value-based care (62 percent). Markedly, physicians are not the only ones participating, highlighting that other health care providers will play an important role in transforming the health system to one centered on value. Nurse practitioners and physician assistants lead the pack when it comes to involvement in value-based care models, as 44 percent report that their practice is highly involved in value-based care, compared to 31 percent of general practitioners, 24 percent of pharmacists and 8 percent of specialists.

A substantial majority of providers say value-based care will help their patients, led by pharmacists (93 percent) and specialists (71 percent), followed by general practitioners (65 percent), and nurse practitioners and physician assistants (64 percent). Providers believe that the keys to ensuring the success of value-based care are resources that help people take their medication as prescribed (90 percent), additional support staff (86 percent) and help from insurers (82 percent).

## Leading the industry toward value-based care

We have a long history of enacting value-based contracting and care models that drive better patient outcomes and reduce patient and customer costs. The philosophy of providing the right care at the right time for the right patient is at the heart of our approach. For example, our pharmacy benefits manager, CVS Caremark, pays more for some drugs that work better and may only pay for specific indications where drugs are proven better than others in their class.

Aetna offers a range of value-based purchasing models, ranging from alternative fee arrangements and risk-sharing models with accountable care organizations to true joint ventures (JVs) with five leading health systems across the country. All of these arrangements help providers to work more closely with patients, coordinate patient care more effectively and help our members lead healthier lives. This approach focuses on delivering health care that is local, simple and personalized to each consumer's individual health goals while reducing the overall cost of care. Aetna's five JVs have achieved excellent clinical outcomes and patient satisfaction scores while reducing unnecessary hospitalizations by an average of 7 percent and decreasing the prescription of high-cost drugs by 24 percent where an effective lesser cost alternative is available.



# Awareness of, involvement in value-based care models is growing

**93%**

of pharmacists say that value-based care will have a positive effect on patient health

**62%**

of providers are highly or somewhat involved in value-based care



**67%**

of providers have heard of value-based care

**57%**

of providers who have heard of value-based care are very satisfied with time spent with patients

# The Predictive Roadmap to Healthier Outcomes

## Digital tools that help track personal health info provide valuable support for consumers

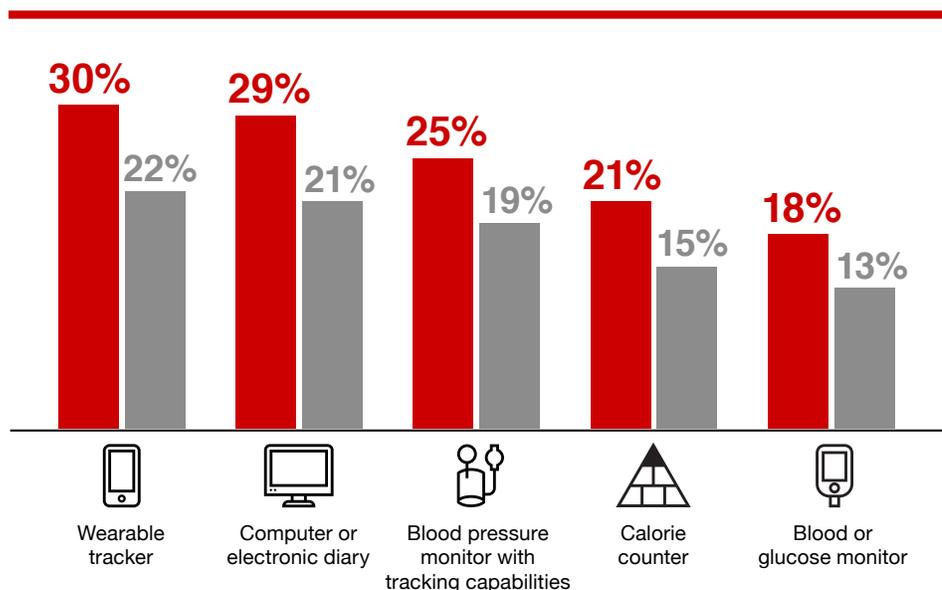
Digital tools are playing an increasingly significant role helping consumers manage and track their health, especially when it comes to

meeting health goals. For example, 70 percent of people with a goal of maintaining a work-life balance feel it is very or somewhat important that they can track and monitor their health, compared to the overall average of 63 percent. Consumers with work-life balance goals are also generally more likely to use digital resources to track their health. For example, 30 percent use a wearable tracker, compared to the consumer average of 22 percent; 29 percent

use a computer or electronic diary, compared to the 21 percent consumer average; and 21 percent use a calorie counter compared to the consumer average of 15 percent.

People with mental health goals are also turning to digital resources more frequently: 27 percent report using a computer or electronic diary, and about one in four say virtual office visits (26 percent) and telehealth (25 percent) would make them more likely to communicate with their doctor. Both numbers are above the consumer average overall.

### Consumers with work-life integration goals are more likely to use digital tools to track their personal health



Conversely, being unable to access these tools is preventing consumers from achieving their health ambitions. Forty-three percent of people who have not made significant progress toward their mental health goal say the biggest barrier has been lack of simple ways to track and monitor their progress. This highlights consumers' need to have better access to digital resources for their mental health, as well as their physical health.

## Attaining your health ambitions

Digital technology has and will continue to positively disrupt how consumers interact with the world, with many industries taking advantage of the greater convenience, ease of use and transparency that technology enables. Yet the health care industry has not fully embraced this new standard of consumer experience.

This needs to change. That is why our digital approach is comprehensive and innovative — we are working to deliver a rich, seamless user experience that helps consumers to reach their own health potential and make informed decisions about their care.

For example, Aetna’s recently launched [Attain app](#) uses the Apple Watch to provide members with personalized goals, track their daily activity levels, recommend healthy actions and ultimately reward people for taking these actions to improve their well-being.

We’re also expanding our telehealth offerings to help patients conveniently manage minor illnesses and injuries, skin conditions and other wellness needs. In so doing, we’re increasing access to affordable health care by making this service available 24 hours a day, seven days a week.

Chronic disease care is another area in which digital solutions can boost the impact of in-person care. Our [Transform Diabetes Care](#) program emphasizes tailored support for patients with diabetes and supports healthy lifestyle behaviors. It provides a digital glucometer to better track and control A1C levels and highly personalized coaching to improve medication adherence.

Overall, the Path to Better Health Study shows that consumers want more personally relevant insights, powered by data and analytics, to support their health goals. Complementing traditional face-to-face physician care, technology-based health care experiences can provide important tools to help people along their health care journeys — and CVS Health and Aetna are committed to providing them with exactly that.

**Desire for convenience is pushing people to use digital tools, but in-person communication is still important**

Looking toward the future of the patient-doctor relationship, consumers want more convenient ways to communicate with their doctors, particularly through digital resources. Respondents said digital messaging (41 percent), virtual office visits (20 percent) and telehealth (18 percent) would make them more likely to communicate with their primary care physician.

Millennials are driving a future that is more rooted in digital devices, whereas older consumers express hesitation. Consumers ages 18-34 are more likely to feel that apps to track their health goals (29 percent), and websites and blogs providing advice (28 percent), would be helpful in achieving their health goals. In comparison, just 17 percent and 14 percent of those 65 or older, respectively, say the

## ■ Making behavioral health recovery a top priority

After being treated for a behavioral health condition, people often need encouragement in their recovery journey. Having access to someone who has lived the journey themselves can help promote a positive recovery and effectively manage setbacks.

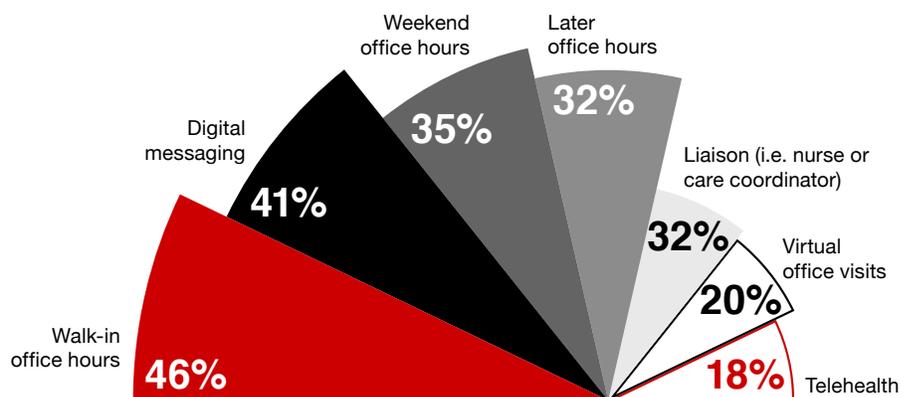
Considering this, Aetna now covers certified peer support specialists for members to help them achieve long-term recovery from a psychiatric disorder or addiction. Support specialists talk to members, share their knowledge to help prevent a relapse and teach practical recovery skills.

same. Millennials are also more likely to use wearable trackers (27 percent), electronic diaries or apps (28 percent), and calorie counters (26 percent), compared to older consumers at 15 percent, 7 percent and 5 percent, respectively.

But face-to-face communication is still important, as consumers say walk-in office hours (46 percent), weekend hours (35 percent) and later office hours (32 percent) would make them more likely to talk with their health care provider. Younger

consumers find in-person interaction with their doctor especially important, saying weekend hours (40 percent) and later hours (34 percent) would make them more likely to talk to their doctors. Only 27 percent and 18 percent of older consumers say the same. This suggests that creating a future health system that provides local, personalized care for the younger generation, in the settings they prefer, will require a careful balance between digital and the in-person support they so clearly desire.

### Both digital tools and in-person interactions are valuable to consumers when communicating with their doctor





## ▣ The power of wearables

Wearable devices are widely known for their ability to support consumers' fitness routines, whether by counting the total steps taken per day or calculating the amount of sleep each night. However, they also have the potential to help patients with complex, chronic care needs.

In May 2019, CVS Health launched a [wearable device pilot](#) for members with multiple sclerosis (MS) who have varying levels of disease severity. Going beyond counting steps, the device also offers symptom monitoring, sleep tracking and a “walk test,” which helps track trends in patient mobility and balance. This allows a CareTeam nurse, specially trained in MS, or other caregivers to identify symptom trends that can possibly result in earlier intervention and better outcomes.

Wearable devices are offering new and different ways to support patient care. We continue to explore the use of these technologies to help members with a wide range of other chronic conditions, including cystic fibrosis, Parkinson's disease and rheumatoid arthritis.

# Conclusion:

## The Front Door to Health Care

As a nation, we are spending \$3.5 trillion annually on health care, a number that continues to rise. In fact, \$2 trillion of that total is spent on **treating chronic conditions**, of which an estimated \$500 billion is avoidable. There is clear opportunity

to change this complex, fragmented and unsustainable system. We can and must do better.

Transforming health care delivery starts with placing patients at the center of their care and engaging them in their individual care journeys. To provide a better health experience means understanding the unique lifestyles, needs and ambitions of

consumers and being aware of the many factors that influence their total well-being — physical, mental, social and emotional.

Reducing the complexity and cost burdens that consumers face today is another key piece of the puzzle. People should feel confident in accessing the care they need, when and where they need it — whether in



the community, at a provider's office or walk-in clinic, in their own homes or through digital tools. By providing convenient, easy-to-use information, resources **and data analytics** to help consumers determine the next best action they can take to get and stay healthy, we can empower patients to become more informed health care decision-makers.

While there are distinct challenges facing the American health care system, CVS Health is at the forefront of transformation. By bringing together CVS Health and Aetna, we are leading that change by delivering high-quality care at a lower cost to consumers across the country. Through our innovative care models, new technologies and coordinated care teams, we are helping people on their path to better health.



## Leading transformative change

When CVS Health and Aetna merged in November 2018, we set out on a mission to transform the consumer health experience. A significant factor in that journey is and will be the expansion of HealthHUB locations at CVS Pharmacy stores across the country. By 2021, we plan to have 1,500 HealthHUB locations in operation.

Offering more personalized pharmacy support and expanded clinical services, HealthHUB teams are providing enhanced support for consumers to optimize their health and the value of their health care dollars, with a focus on personalized recommendations for next best health actions and effective care decision-making. This support includes access to weight loss programs. There are also community space and digitally enabled offerings, including wellness rooms to host health classes and learning tables with iPads for consumers to explore health apps.

It's clear that it will take incremental steps to fix what's broken in the health care system, but the innovative care offerings and services in our HealthHUB locations will help us make valuable progress. This is where the future of care can and should be going. It's up to us to continue leading the way.

# Methodology

The Path to Better Health Study by CVS Health, first released in 2018 and called the **Health Ambitions Study**, was conducted in April and May 2019 and included two surveys fielded by Market Measurement, a national market research consulting firm. The consumer survey comprised 1,000 participants 18 and older, located throughout the U.S. It also oversampled six metropolitan statistical areas — Atlanta, Austin, New York, Philadelphia, Seattle and South Florida, and among two ethnic groups: African Americans and Hispanics. The survey of 400 providers focused on primary care physicians and specialists with at least two years' experience. In 2019, the study was expanded to include nurse practitioners, physician assistants and pharmacists.



## About CVS Health

CVS Health is the nation's premier health innovation company helping people on their path to better health. Whether in one of its pharmacies or through its health services and plans, CVS Health is pioneering a bold new approach to total health by making quality care more affordable, accessible, simple and seamless. CVS Health is community-based and locally focused, engaging consumers with the care they need when and where they need it. The Company has more than 9,900 retail locations, approximately 1,100 walk-in medical clinics, a leading pharmacy benefits manager with approximately 94 million plan members, a dedicated senior pharmacy care business serving more than one million patients per year, expanding specialty pharmacy services, and a leading stand-alone Medicare Part D prescription drug plan. CVS Health also serves an estimated 38 million people through traditional, voluntary and consumer-directed health insurance products and related services, including rapidly expanding Medicare Advantage offerings. This innovative health care model increases access to quality care, delivers better health outcomes and lowers overall health care costs. Find more information about how CVS Health is shaping the future of health at <https://www.cvshealth.com>.

