The State of Primary Care

March 2026

Comprehensive primary care promises to transform the U.S. health care system by unlocking powerful health improvements and cost savings for patients and taxpayers. By investing in primary care, lawmakers can improve the health and wellbeing of all Americans.

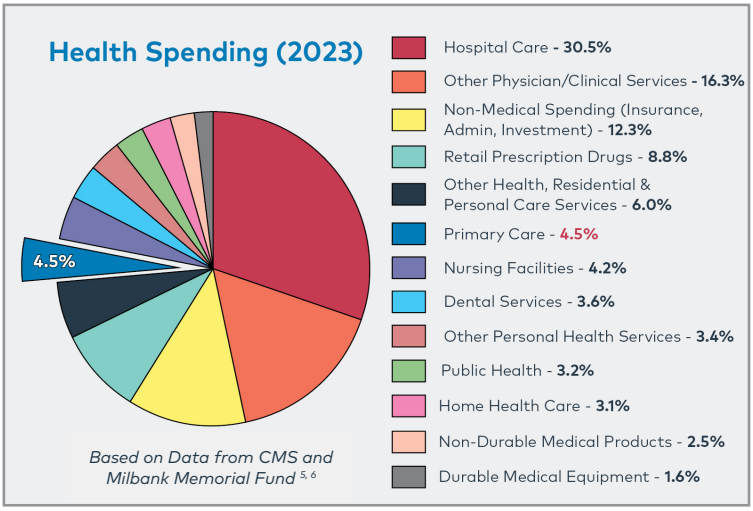
The Promise of Primary Care

Research has consistently shown that primary care is the foundation of a strong, effective health care system – providing better access to health services, improved outcomes and lower mortality rates.[1,2]

Evidence has also shown that primary care can generate cost-savings—both for patients and taxpayers. Findings from both CMS[3] and the CBO[4] have shown that Accountable Care organizations (ACOs) with a higher proportion of primary care physicians and primary care visits were more likely to generate cost savings – with CMS estimating those ACOs generating twice as much shared savings as other ACOs.

The Cost of Underinvestment

Unfortunately, policymakers have underinvested in primary care—neglecting an opportunity to improve our nation's health while also controlling costs. In 2023, primary care accounted for ***less than 5% of all health care spending***.



Delivering on the Promise of Primary Care

Lawmakers can deliver on the promise of primary care by:

- *Making well-constructed primary care **hybrid payment options** — a mix of prospective and fee for service (FFS) — widely available across Medicare and other payers*
- ***Removing financial barriers** to primary care – in Medicare and in private plans*
- *Accelerating **behavioral health integration** into primary care*
- *Supporting **private sector and state primary care** payment innovations*
- ***Leveraging Medicaid/CHIP** to strengthen primary care in **rural and underserved communities***

1. Leiyu Shi, "The Impact of Primary Care: A Focused Review," Scientifica, December 31, 2012, https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3820521/
2. Sanjay Basu, "Association of US Primary Care Physician Supply and Population Mortality," JAMA Internal Medicine, April 1, 2019, https://thepcc.pub/PCC-Mortality-JAMA
3. "Medicare Shared Savings Program Saves Medicare More than $1.8 Billion...," CMS, August 24, 2023, https://thepcc.pub/CMS-MSSP-Press-Release
4. "Medicare Accountable Care Organizations: Past Performance and Future Directions," Congressional Budget Office, April 2024, https://www.cbo.gov/publication/60213
5. "National Health Expenditures - 2023," Centers for Medicare & Medicaid Services, Accessed March 24, 2026, https://www.cms.gov/data-research/statistics-trends-and-reports/national-health-expenditure-data/historical
6. "The Health of US Primary Care: 2026 Scorecard Data Dashboard," Milbank Memorial Fund. February, 2026, https://www.milbank.org/primary-care-scorecard/

Primary Care in Tennessee

March 2026

Communities across the nation are struggling to access high-quality, comprehensive primary care. Below is a snapshot of the state of primary care in Tennessee.

Usual Source of Care

16.9%

of people in the U.S. lack ***a usual source of care*** – a trusted professional or facility where someone can get consistent care and health advice.[7]

Childhood Access to Medical Home

51.4%

of children in Tennessee ***do not have a medical home*** – a comprehensive source of care that helps manage all aspects of a child's health.[7]

Primary Care Spend Percent for Seniors

7.5%

of Tennessee ***health care spending for people over 65*** is attributed to primary care – higher than the national average of 5.7%.[7]

% of Residents in a Primary Care Shortage Area

38.5%

of Tennessee residents live in a ***primary care Health Professional Shortage Area***.[8]

7. "State Health Data Center," Commonwealth Fund, accessed March 24, 2026, https://www.commonwealthfund.org/datacenter
8. Calculation based off of "Designated Health Professional Shortage Areas Statistics," Bureau of Health Workforce, HRSA, accessed March 24, 2026, https://data.hrsa.gov/topics/health-workforce/shortage-areas and "Annual Estimates of the Resident Population for the United States", U.S. Census Bureau, Jan. 2026, https://www.census.gov/data/tables/time-series/demo/popest/2020s-state-total.html