

West Health Battleground State Research Findings Presented by Global Strategy Group

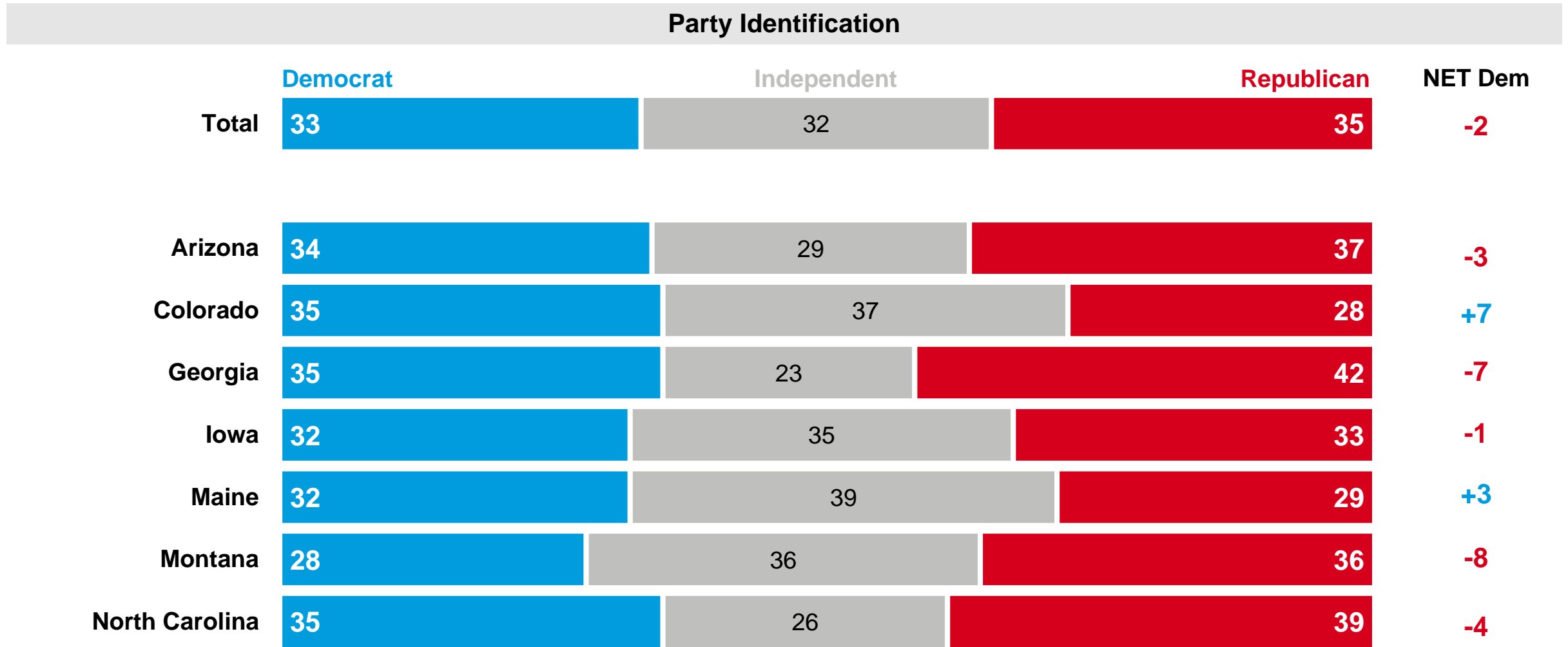


Key Findings

- **Health care is a top issue for audiences in Senate battleground states. The issue is inextricably tied to audience's other top concerns: the coronavirus crisis and the economy.**
- **Health care concerns and support for reform are strong across the political spectrum. In fact, audiences prioritize lower health care costs over lower taxes and deregulation.**
- **However, there is also a tale of two countries; as health care concerns and support for reform are especially strong among critical audiences needed to build support with.**
- **A majority of the Senate battleground audience supports a public option, and prefer a public official who supports a public option to one who opposes the policy by more than two to one.**

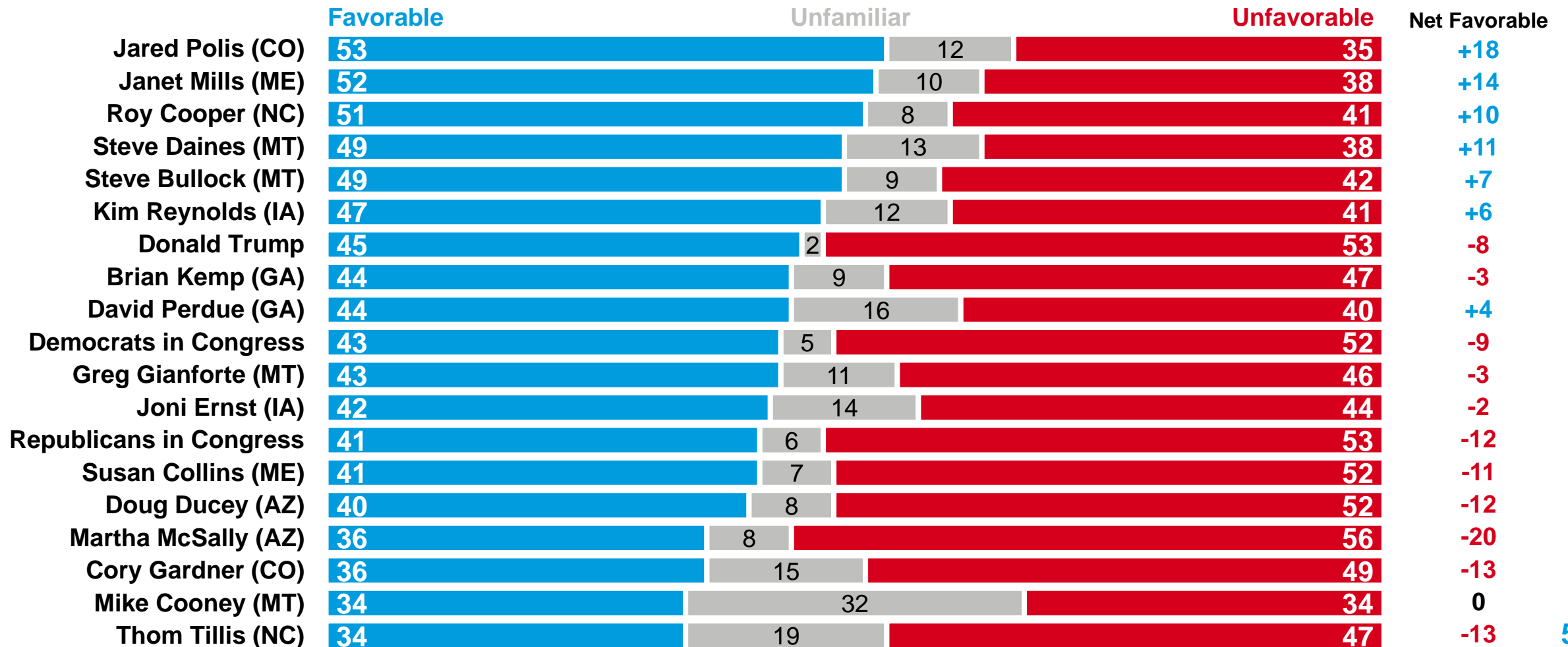
Political Landscape

Republicans hold a slight edge in the Senate battleground, yet independents make up a plurality in most states.

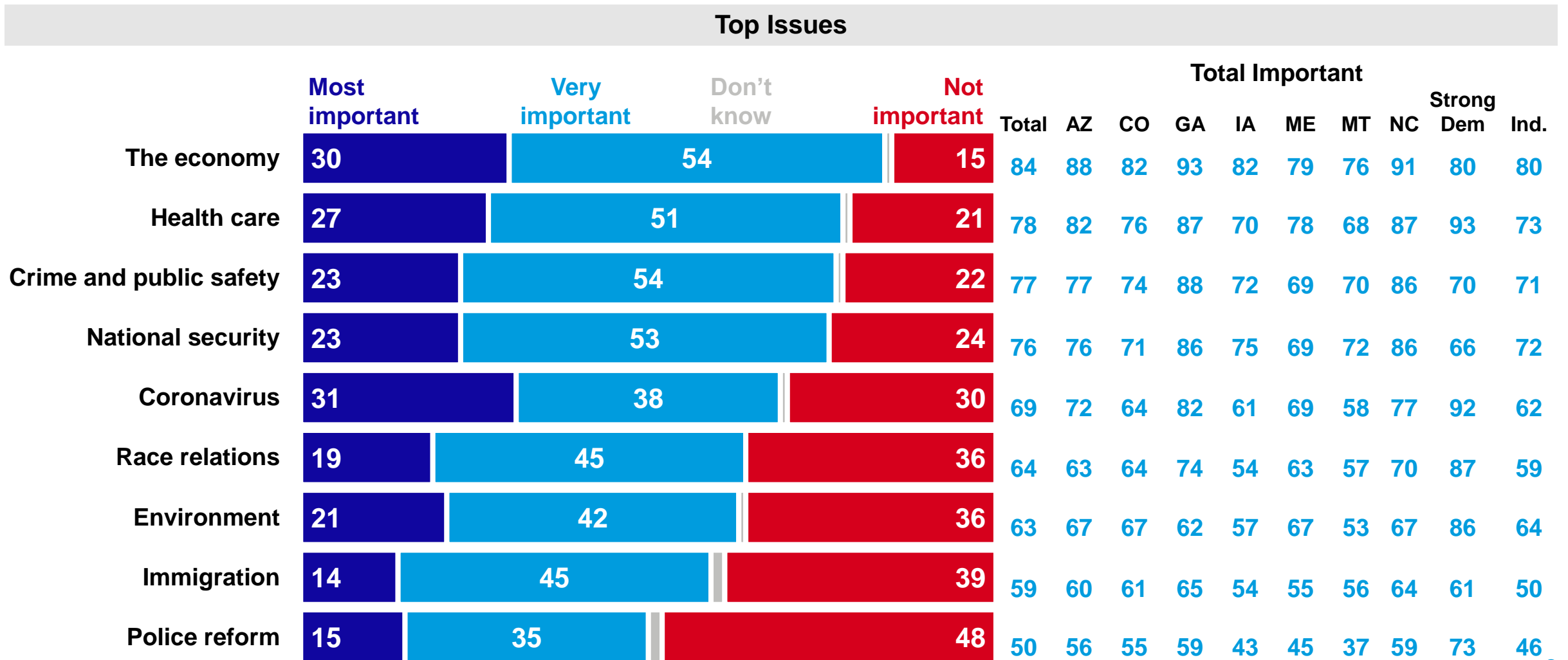


Trump and both parties in Congress are underwater. Democratic governors receive positive ratings, while Republican senators earn negative marks.

Favorability of Public Officials

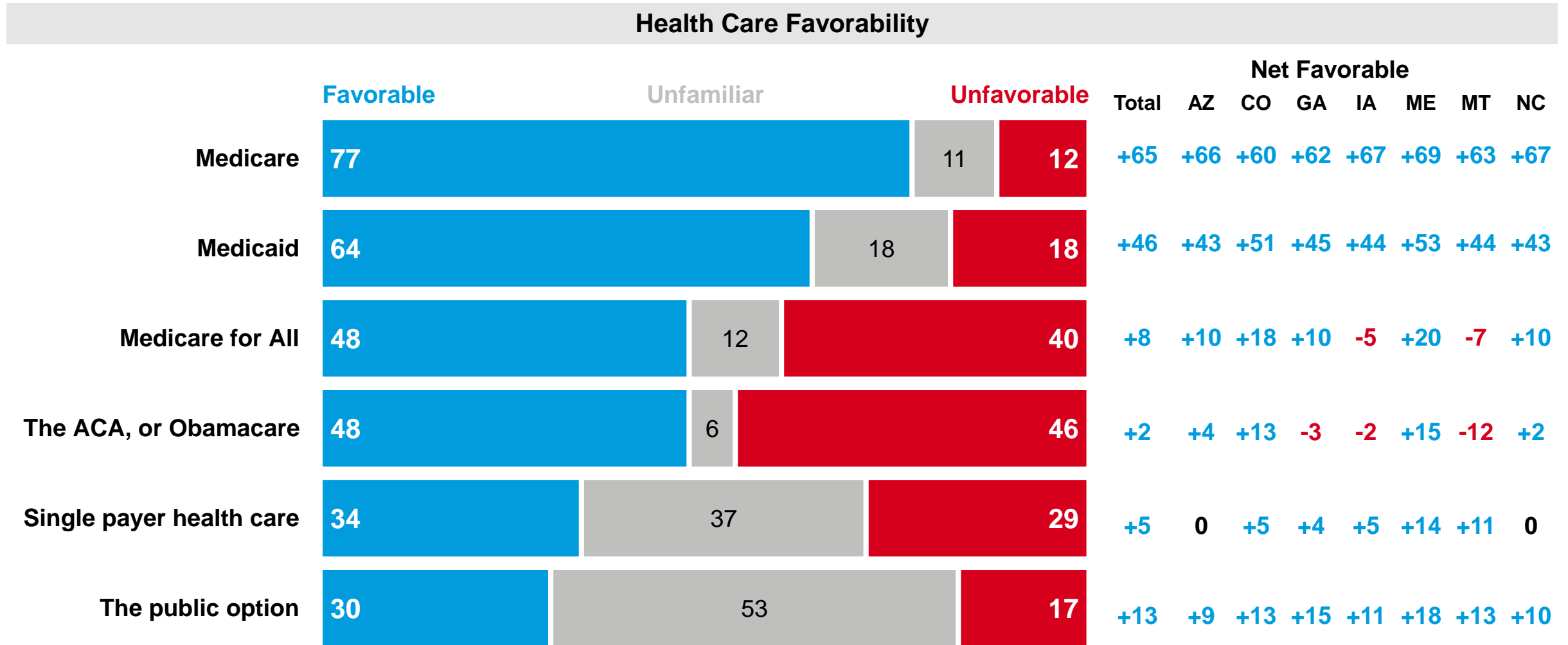


Health care, coronavirus, and the economy beat out crime and public safety as the most important issues for Senate battleground audiences.



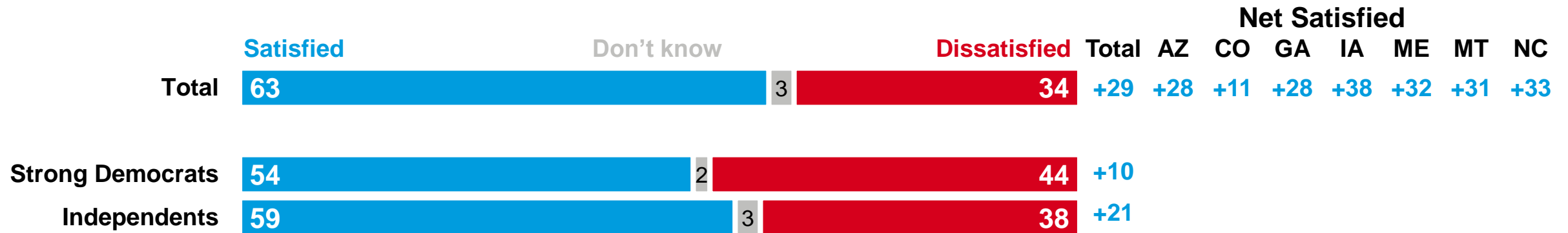
Health Care Landscape

ACA in good standing overall among battleground audiences. Medicare and Medicaid are incredibly popular across states. While most haven't heard of the public option – those who have like it.

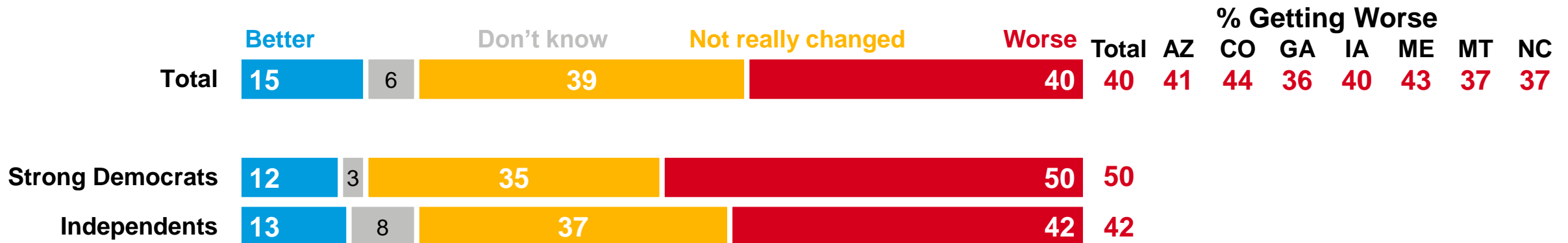


Despite widespread satisfaction with the U.S. health care system, a plurality believe that our health care system is getting worse.

Overall Satisfaction with the U.S. health care system



Would you say that the U.S. health care system is getting better, worse, or has it not really changed?



43% of the audience with private employer sponsored health insurance say that the health care system is getting worse

Most say that health care costs are going up, and just over a quarter have said that they did not seek treatment due to cost of care.

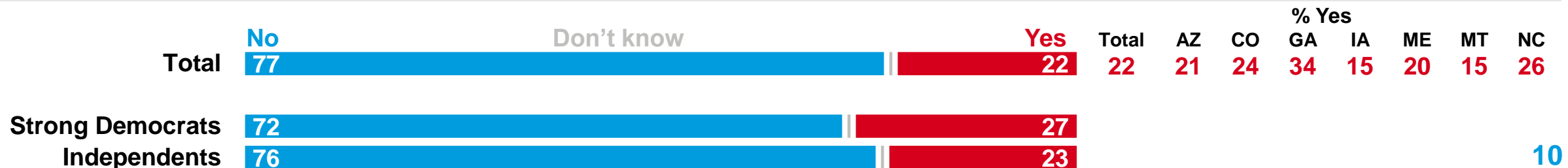
Would you say that health care costs are going up, going down, or staying the same?



Thinking about the last 12 months, have you or someone in your household had a health problem but you did not seek treatment due to cost of care?

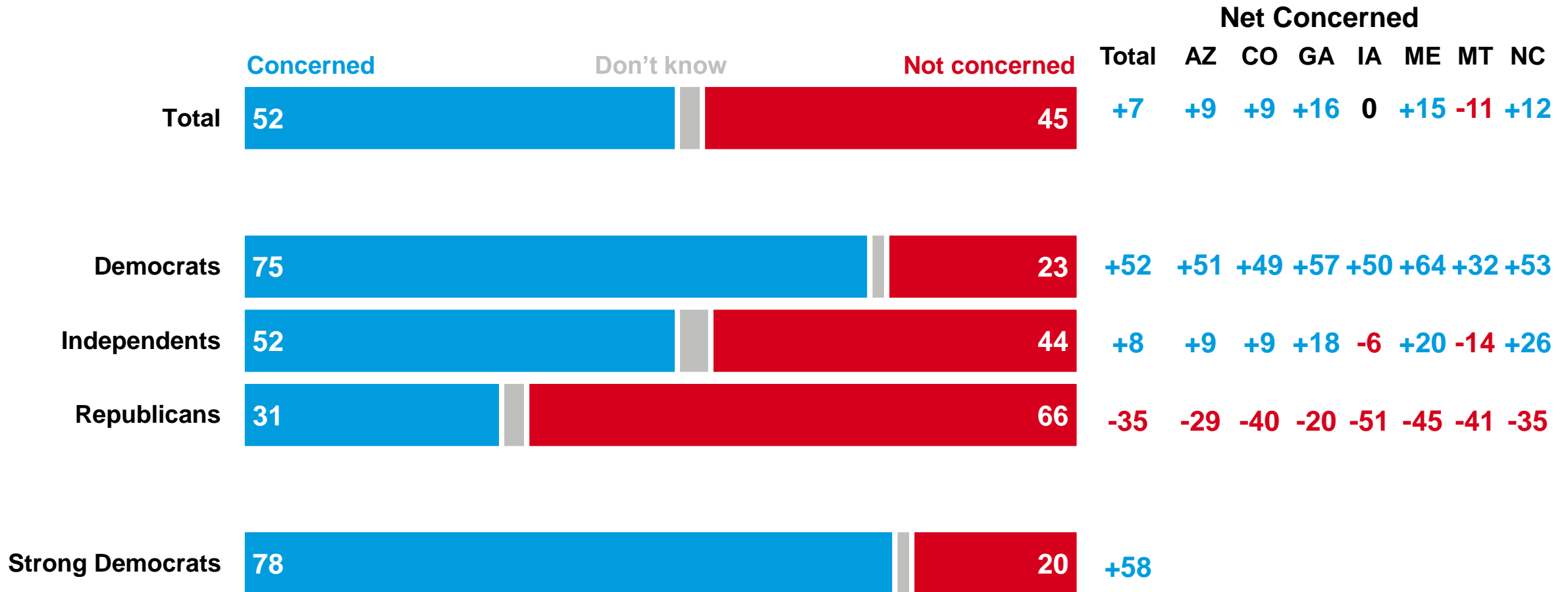


Thinking about the last 12 months, has there been a time when you or someone in your household could not pay for medicine or drugs prescribed to you by your doctor because you didn't have enough money to pay for them?



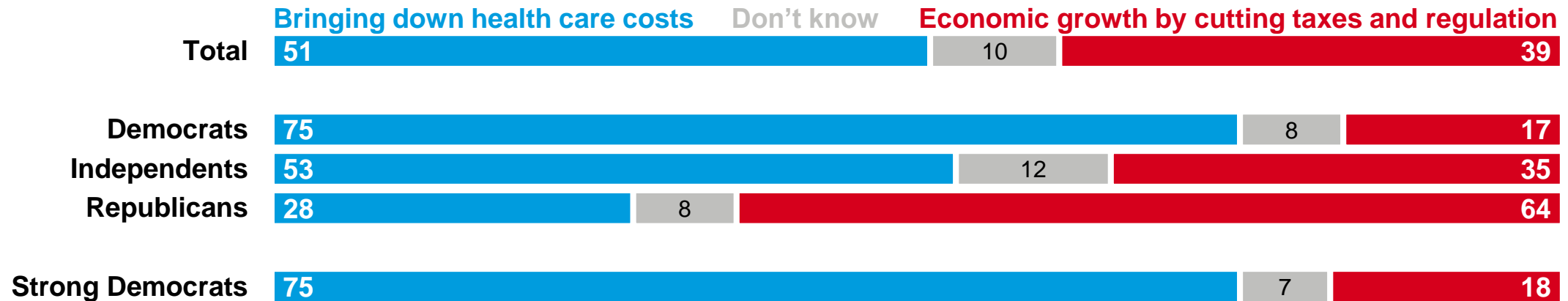
Most are concerned that potential COVID patients are not seeking treatment due cost of care.

Concern about the uninsured not seeking treatment for coronavirus because they cannot afford treatment:

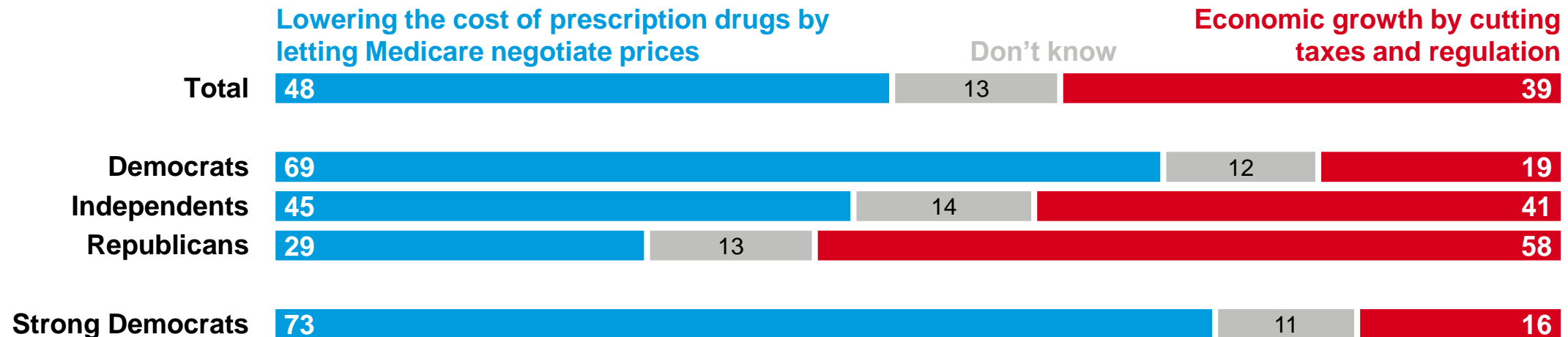


Audiences prioritize reducing health care costs ahead of cutting taxes and regulation, especially among target audiences.

Which public official would you prefer if this were all you knew about them? A public official who will prioritize...



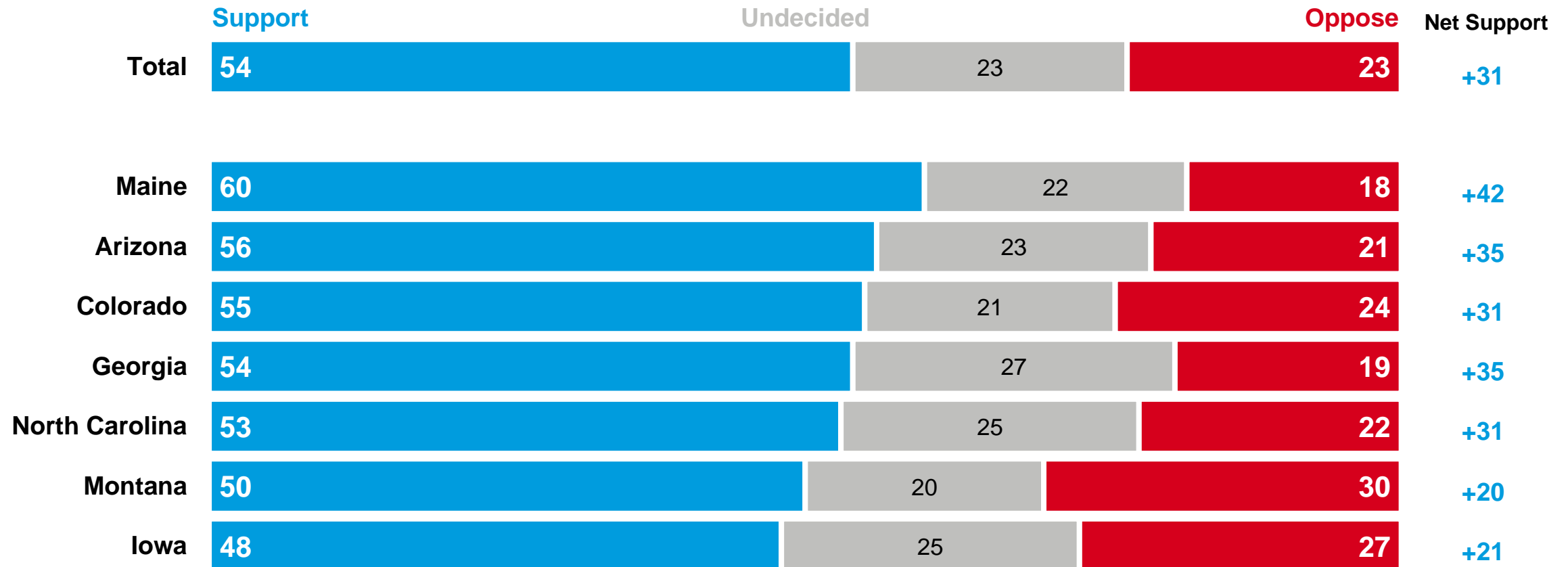
Which public official would you prefer if this were all you knew about them? A public official who will prioritize...



The Public Option

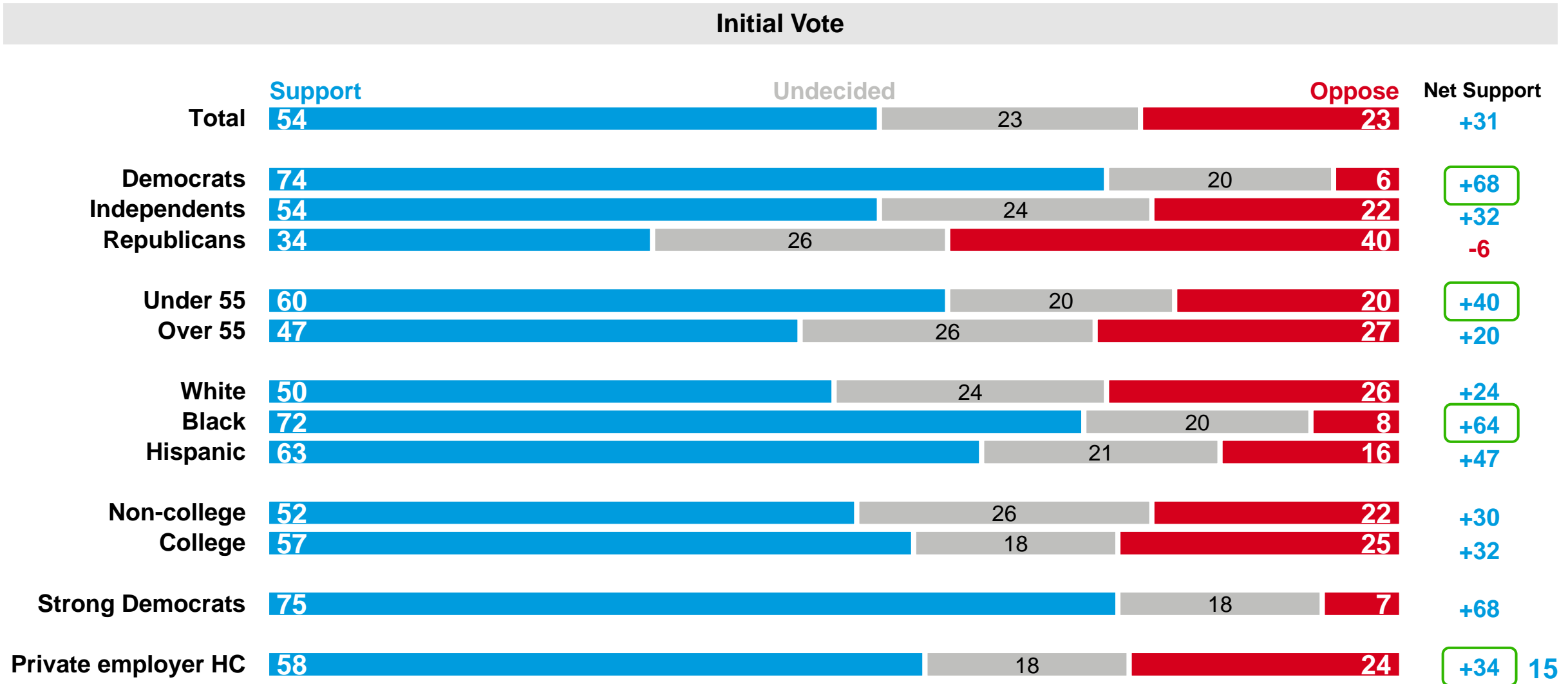
The public option has majority support across Senate battleground states.

Initial Vote



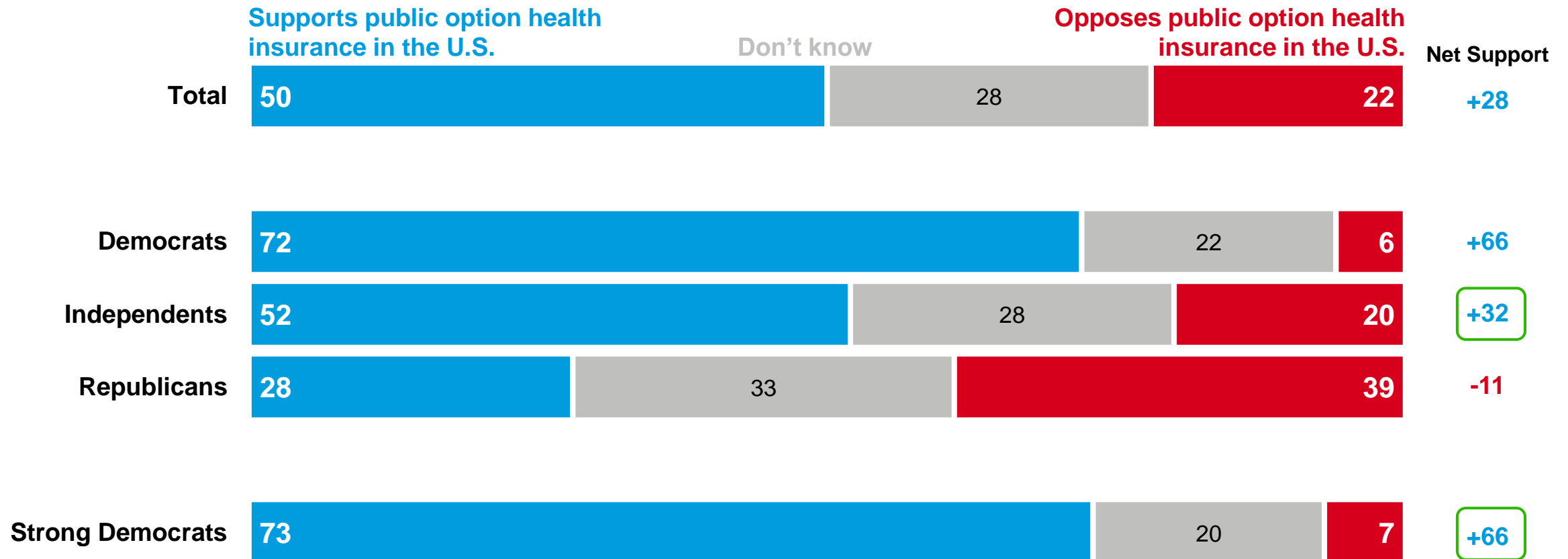
When initially asked, **30%** were favorable towards the public option, while **17%** were unfavorable.

Democrats, younger people, and Black audiences drive support across target states. Even those with employer insurance are in favor.



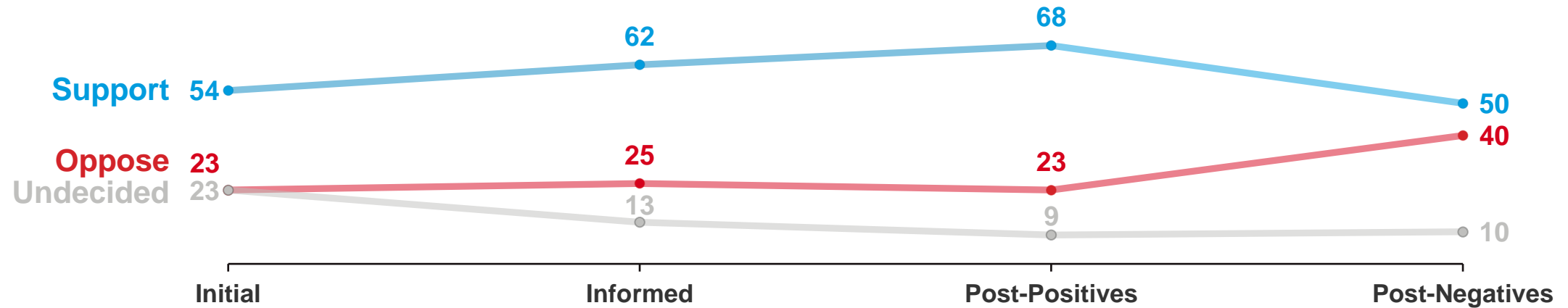
A public official who supports a public option beats out one who opposes it – particularly among key constituencies.

Which public official would you prefer if this were all you knew about them? A public official who...

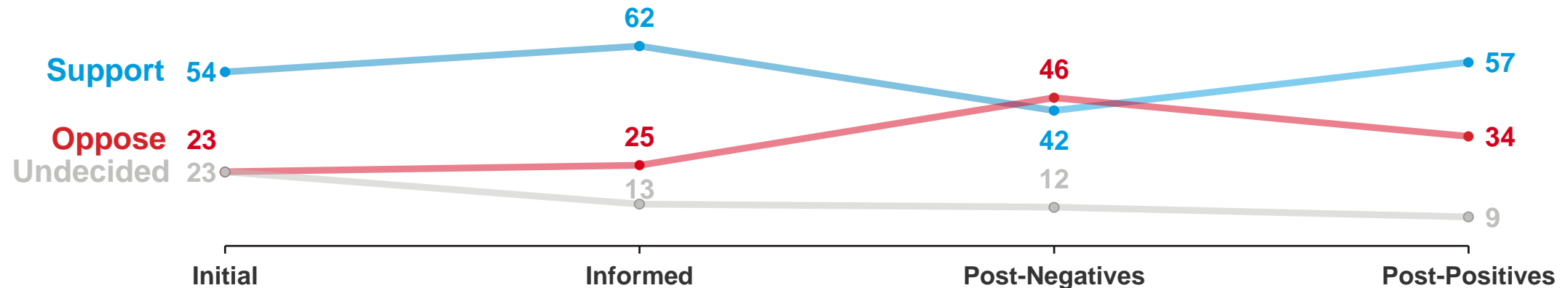


We'll need to do more than positive introduction to shore up public support for the public option.

Vote Movement – Positives heard first



Vote Movement – Negatives heard first



Support for the public option remains above water even after negative attacks, but we lose ground with Republicans after a fully engaged debate.

Vote Movement

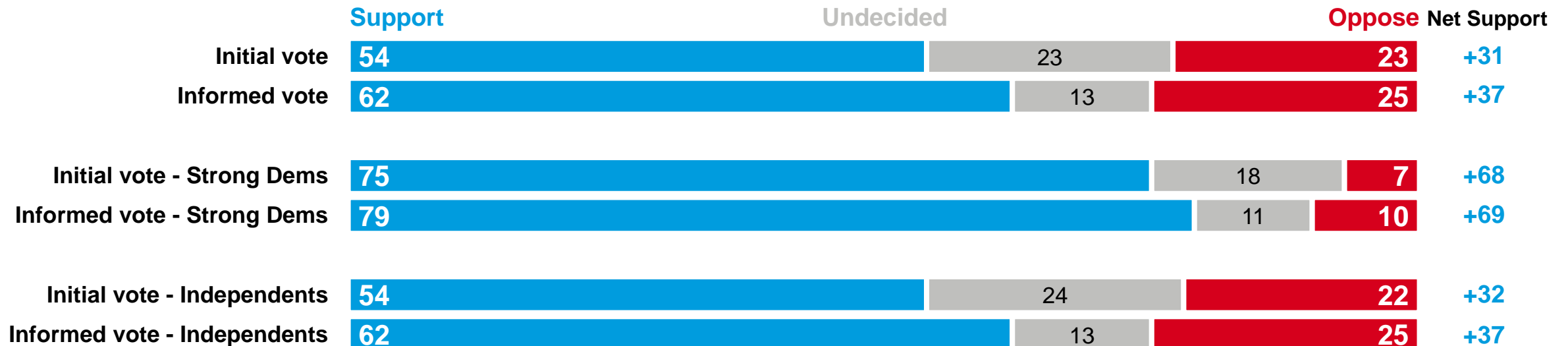
	Net support			
	Initial	Informed	Initial Messaging	Final vote
Total	+31	+37	+20	+16
Democrats	+68	+68	+58	+60
Independents	+32	+37	+24	+19
Republicans	-6	+6	-19	-28
Under 55	+40	+44	+28	+26
Over 55	+20	+27	+12	+5
White	+24	+31	+17	+11
Black	+64	+62	+44	+43
Hispanic	+47	+52	+33	+30
Non-college	+30	+34	+16	+9
College	+32	+40	+26	+25
Strong Democrats	+68	+69	+61	+63
Private employer HC	+34	+41	+23	+16

Messaging

A positive introduction performs well and pushes people to our corner – especially target audiences.

Informed Vote

The public option would create a publicly administered health insurance option for every American. This public insurance would function the same as a private insurance plan, where you would pay a monthly premium to either buy into programs like Medicare or Medicaid or buy into a newly created health insurance agency, regardless of employment status. Americans would be given the choice between public insurance or private insurance like they have access to now, including current employment-based insurance. There would still be private health care providers and hospitals, but there would be a new option for consumers on the health insurance marketplace.



Our best performing positive messages focus on surprise billing, coronavirus, and prescription drugs.

Positive messages for the public option

Total	Strong Dems	Ind	
43	61	40	[SURPRISE BILLS] The public option would put a stop to surprise medical bills by stopping hospitals and providers from charging out-of-network rates in situations when a patient has no choice over which hospital they go to.
<i>% very convincing</i>			
40	63	36	[CORONAVIRUS] The public option would provide uninsured Americans access to coronavirus treatment and reduce the spread of the disease.
39	57	37	[PRESCRIPTION DRUGS] The public option will reduce the cost of prescription drugs by letting the government negotiate with drug companies for discounts.
39	62	35	[COVERAGE] The public option will ensure all Americans have access to affordable, quality health insurance by letting anyone buy into a public insurance plan.
37	55	34	[PRIVATE PLANS] The public option allows for people to keep their private insurance plans, including employment-based plans, while simultaneously offering public insurance to anyone who wants it.
36	53	34	[SAVINGS] The public option would create big cost savings as private insurance companies would be forced to compete with a public insurance option.
36	50	33	[VALUE BASED CARE] The public option will incentivize doctors to prescribe effective treatments like preventative care and put an end to doctors over prescribing unnecessary treatments.
32	51	29	[REDUCED COSTS] The public option will reduce health care costs for patients by letting the government negotiate with hospitals and health care providers.
27	48	23	[NONPROFIT] The public option is fundamentally a public program that has no profit motive, and is accountable to democratically elected representatives.

Open ends show that affordability and universal coverage are drivers of positive association, while government tends to be a negative.

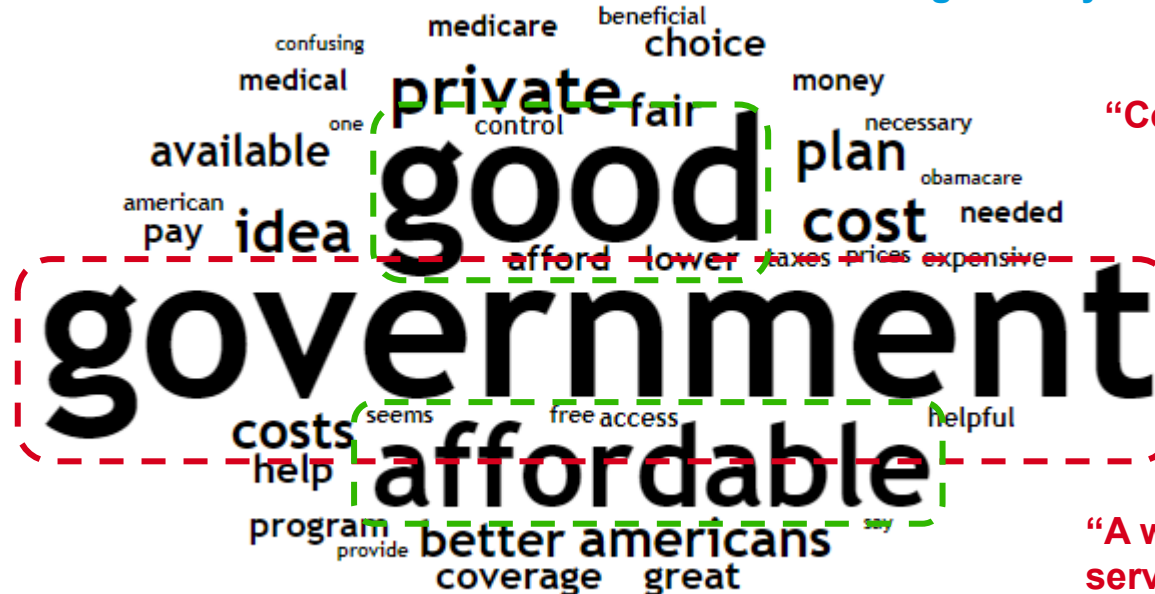
What words or phrases would you use to describe public option health insurance?

“Interesting, chance for everyone to have health insurance”

“Affordable and fair”

“A good way for people to easily get health care”

“Better than nothing”



“Could be bad for the economy”

“A good compromise”

“Anything run by the government will fail”

“Very smart option”

“A way for government to control what services will be provided”

“Affordable, equal for everyone, efficient”

“Government controlled health insurance”

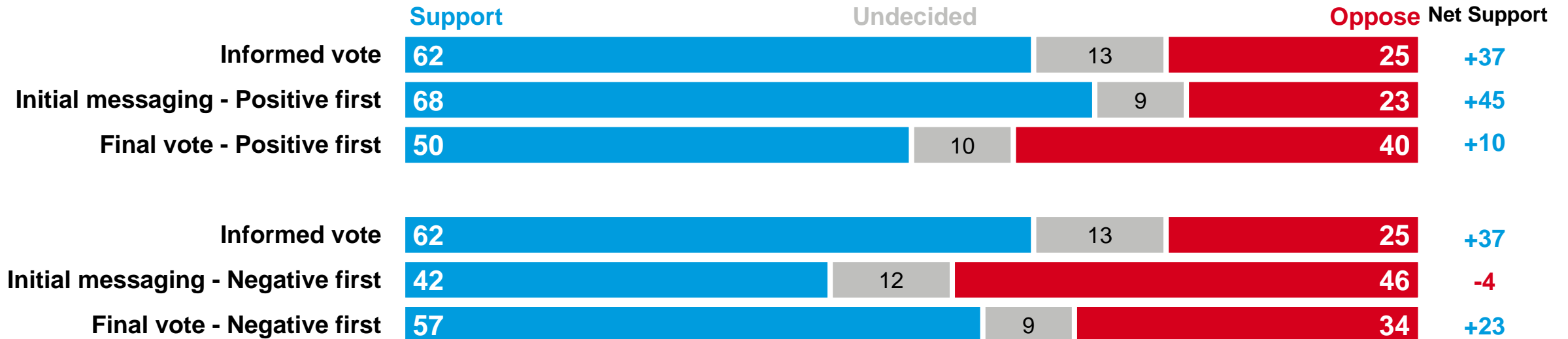
A negative attack does knock support down and drive up concern among target audiences.

Negative messaging

The public option will just be another costly government program that is bad for patients and families. The public option will be government controlled health care that could raise payroll taxes on working Americans by \$2,300 per year, and cause longer wait times, hospital closures, and patients won't be able to choose their own doctor.

% raises major doubts

47% Total
42% Independents
28% Strong Democrats



Conclusions and Recommendations

Conclusions and Recommendations

- **Health care is a top concern for battleground audiences.** Across states and among target audiences, health care ranks as a top issue, just behind the economy. It ranks third out of all issues tested for audiences who rate it the “most” important, behind the economy and coronavirus. Even amidst the national news coverage about protests in cities across America, health care beats out crime and public safety and national security.
- **Audiences perceive a worsening health care system with rising costs.** Despite their widespread satisfaction with the health care system, more of the audience admit that the health care system is getting worse than it is getting better across the target states, and the large majority say that health care costs are going up. More than a quarter of the audience says that they did not seek health care treatment due to costs in the last year, and almost a quarter said that in the past year there has been an instance when they could not afford their prescription drugs.
 - Senate battleground audiences - notably self-identified independents - express a preference for a public officials who want to bring down health care costs and lower the costs of prescription drugs over a public official who wants economic growth by cutting taxes and regulation.

Conclusions and Recommendations

- **The public option starts out in a strong position – despite the audience’s general unfamiliarity.** Audiences aren’t generally familiar with the public option, but they largely support the public option without any initial messaging, and half of the electorate prefers a public official who supports the public option than opposes. The public option gets initial strong support from Democrats, younger people and Black audiences, and notably gets majority support from self-identified independents.
- **Vote movement shows that introducing the public option is very effective, but it is still vulnerable if it comes under fire.** Positive introduction is very effective at growing support for the public option and even puts it ahead with tough to get audiences like Republicans. However, a simple kitchen sink negative does make a dent in its support, and even puts us behind if audiences hear it first. Thankfully, positive issue communications are able to keep the public option above water both on offense and defense.
- **The best positive communications talk about surprise billing, COVID, and prescription drugs.** Promises of putting an end to surprise billing was the top testing message overall, among target audiences, and a popular message within each state. The prescription drugs positive was also highly rated, which compliments our earlier data showing that underlying cost concerns are very motivating for audiences.
 - Its also clear that in midst of the pandemic, a COVID centered message is effective. A majority of the audience expressed concern about the possibility of potential coronavirus patients not seeking care because of lack of funding. Our COVID message was the second-best performing message overall.

Thank You

Methodology

Audience

Between August 20 and 30, 2020 Global Strategy Group conducted a multi-channel survey of **4200 likely general election voters (600 per state) in Arizona, Colorado, Georgia, Iowa, Maine, Montana, and North Carolina.**

Care has been taken to ensure the geographic and demographic divisions of the population of likely voters are properly represented.

Confidence Interval

The confidence interval for the survey at the 95% confidence interval is $\pm 1.5\%$

Demographics of the Electorate

Gender

	Total	AZ	CO	GA	IA	ME	MT	NC
Men	47	47	48	43	48	48	50	44
Women	53	53	52	57	52	52	50	56

Age

18-29 year olds	16	15	17	20	18	11	12	17
30-44 year olds	24	22	28	22	23	23	23	23
45-54 year olds	15	14	17	16	15	15	14	17
55-64 year olds	18	18	16	19	17	20	20	17
Seniors 65+	27	32	22	23	27	30	31	25

Race

White	79	71	78	61	93	93	91	69
African-American/Black	10	4	5	31	2	2	1	23
Hispanic	7	18	13	4	3	2	3	2
Other	4	8	5	4	2	2	6	6

Education

	Total	AZ	CO	GA	IA	ME	MT	NC
High school or less	20	14	16	22	22	22	22	23
Some college	39	49	35	45	38	34	32	40
4-year college graduate	26	24	32	20	28	27	26	24
Post graduate	14	12	16	13	12	15	19	12

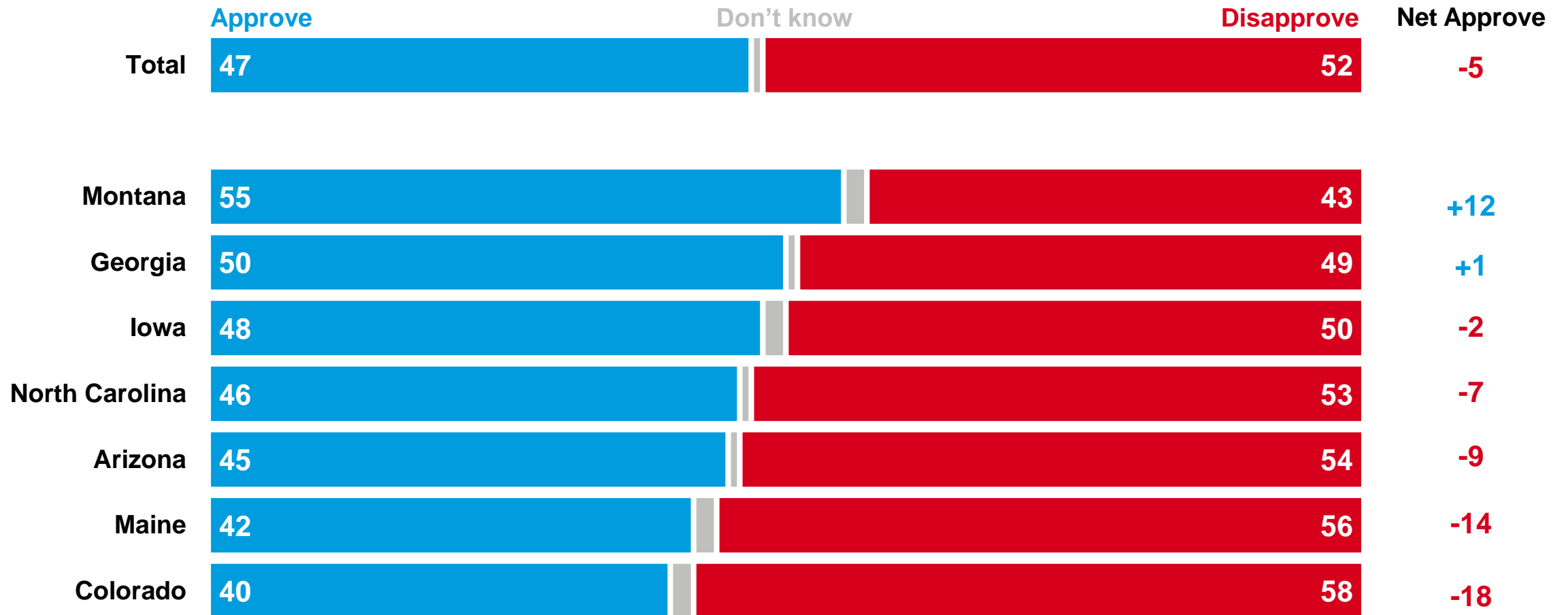
Health care coverage

Private insurance	52	46	58	53	58	48	49	50
Private employer insurance	40	35	44	42	45	36	36	39
Medicare	29	32	22	27	27	35	30	27
Medicaid	7	10	11	5	6	6	5	8
The VA	3	3	3	1	2	3	5	3
Do not have insurance	6	6	5	12	3	4	4	7

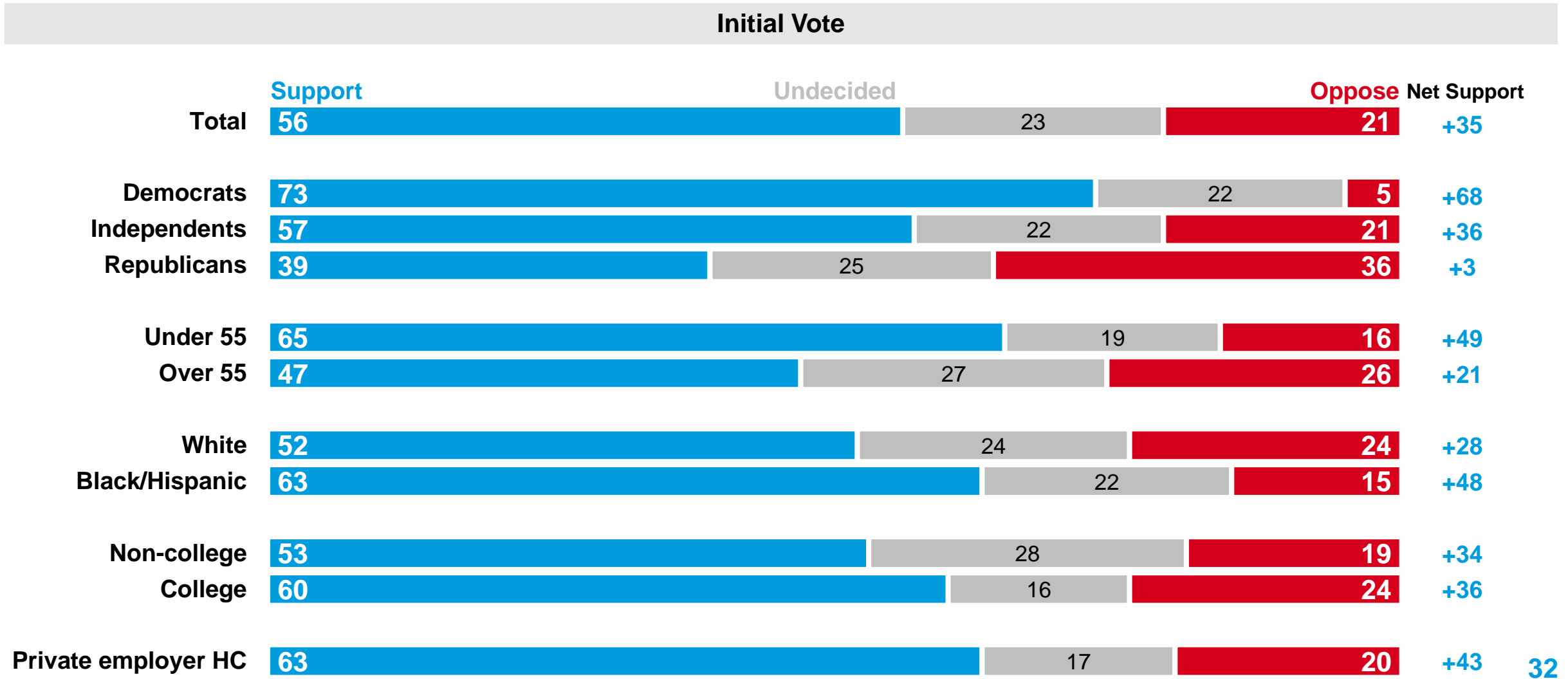
Appendix

Negative attitudes carry over to Trump's job rating – with the exception of Montana

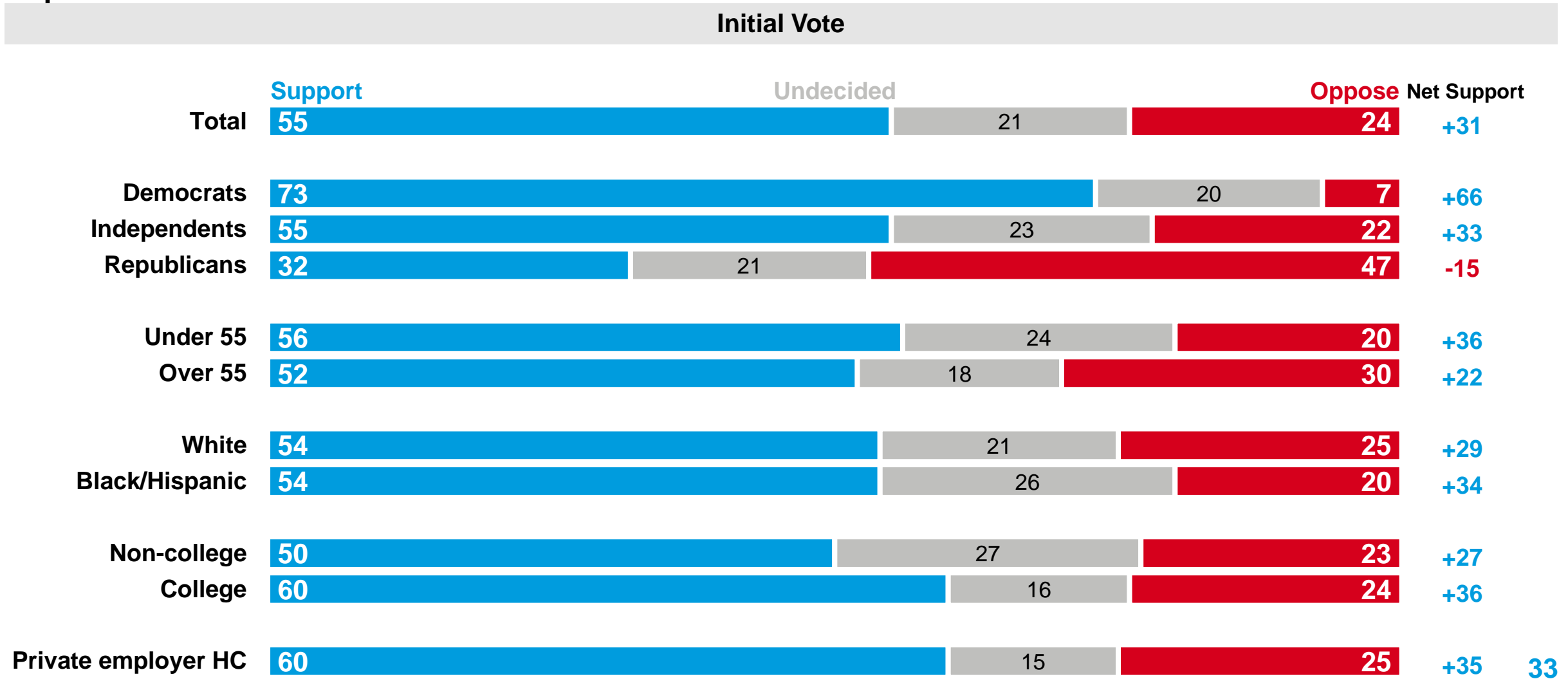
Donald Trump Job Approval



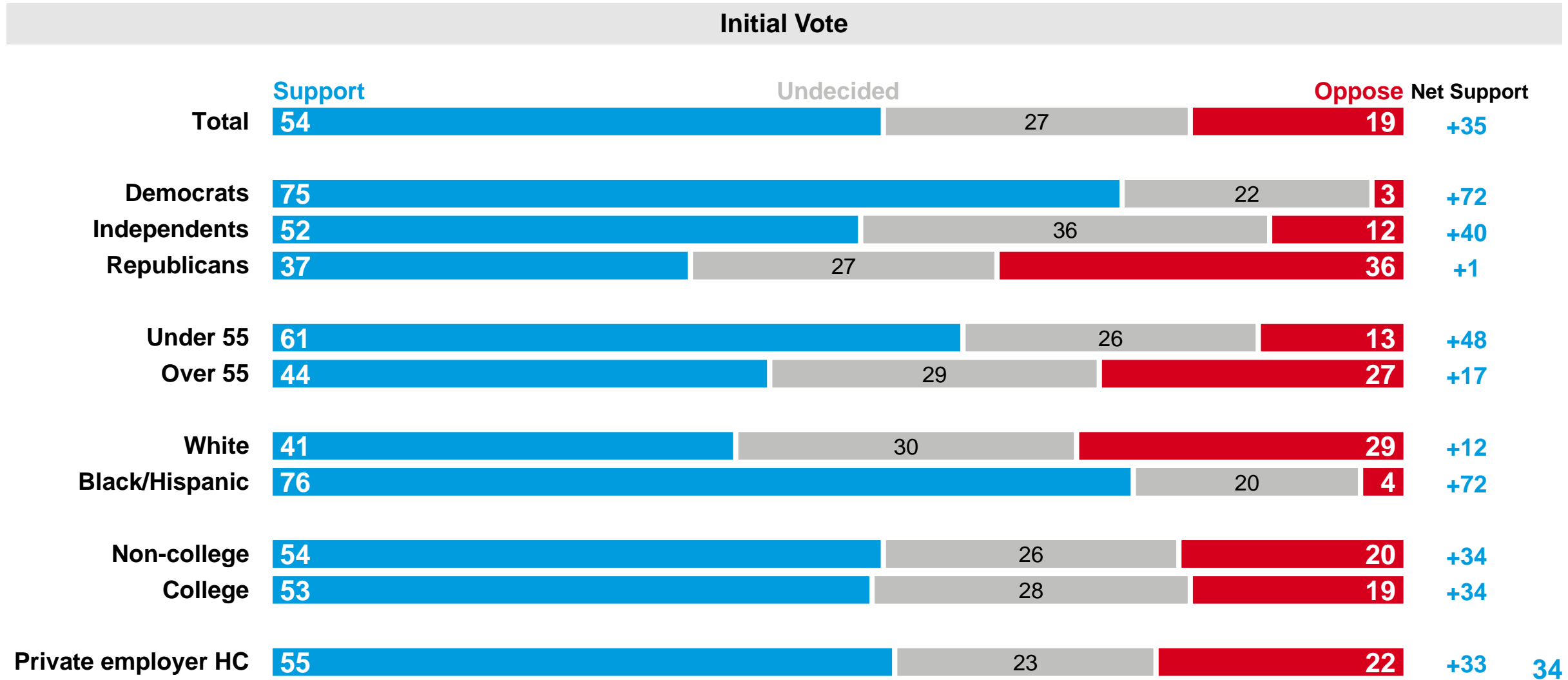
ARIZONA: Support for public option in Arizona is driven by Democrats, younger people, people of color, and those with ESI.



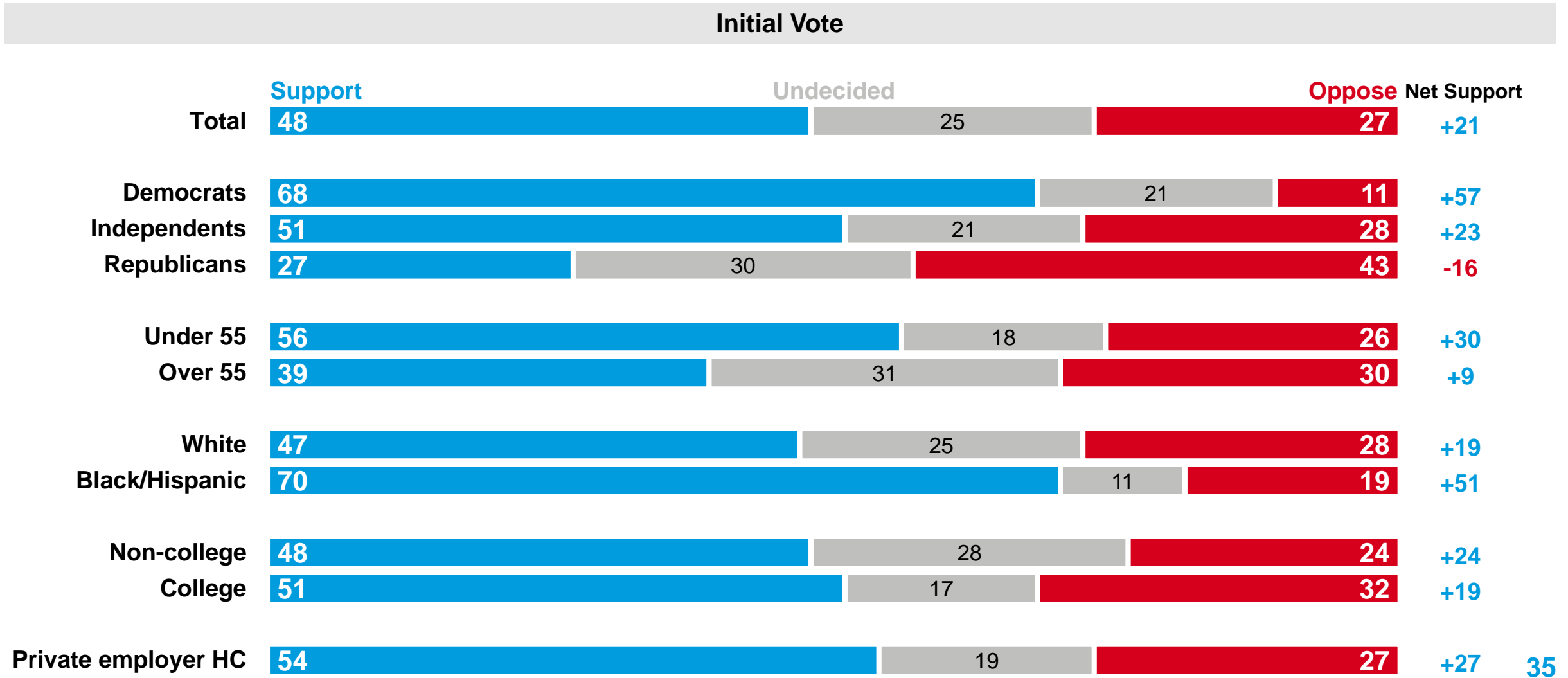
COLORADO: Democrats, college audiences, and audiences with employer-based health care are big drivers of support for the public option.



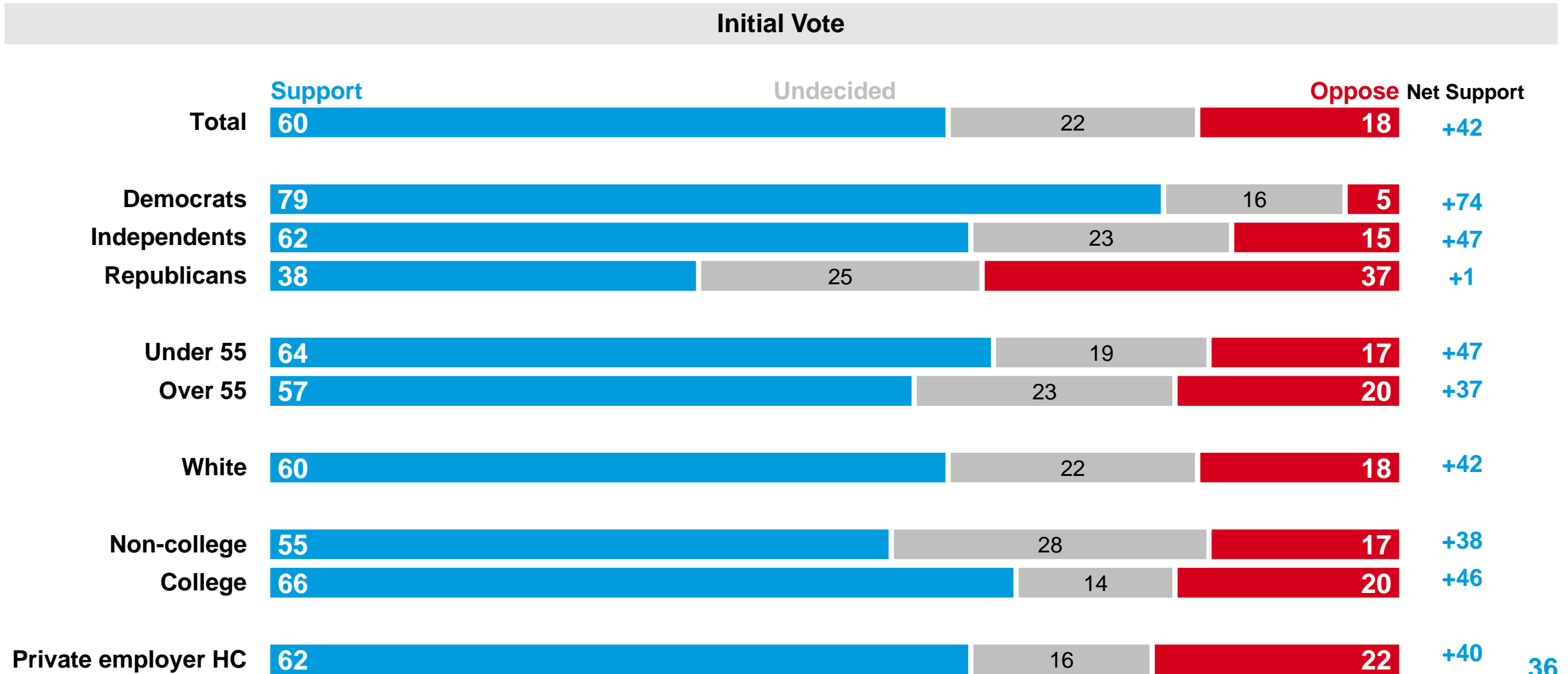
GEORGIA: In Georgia, people of color, Democrats, and younger audiences are the biggest drivers of support.



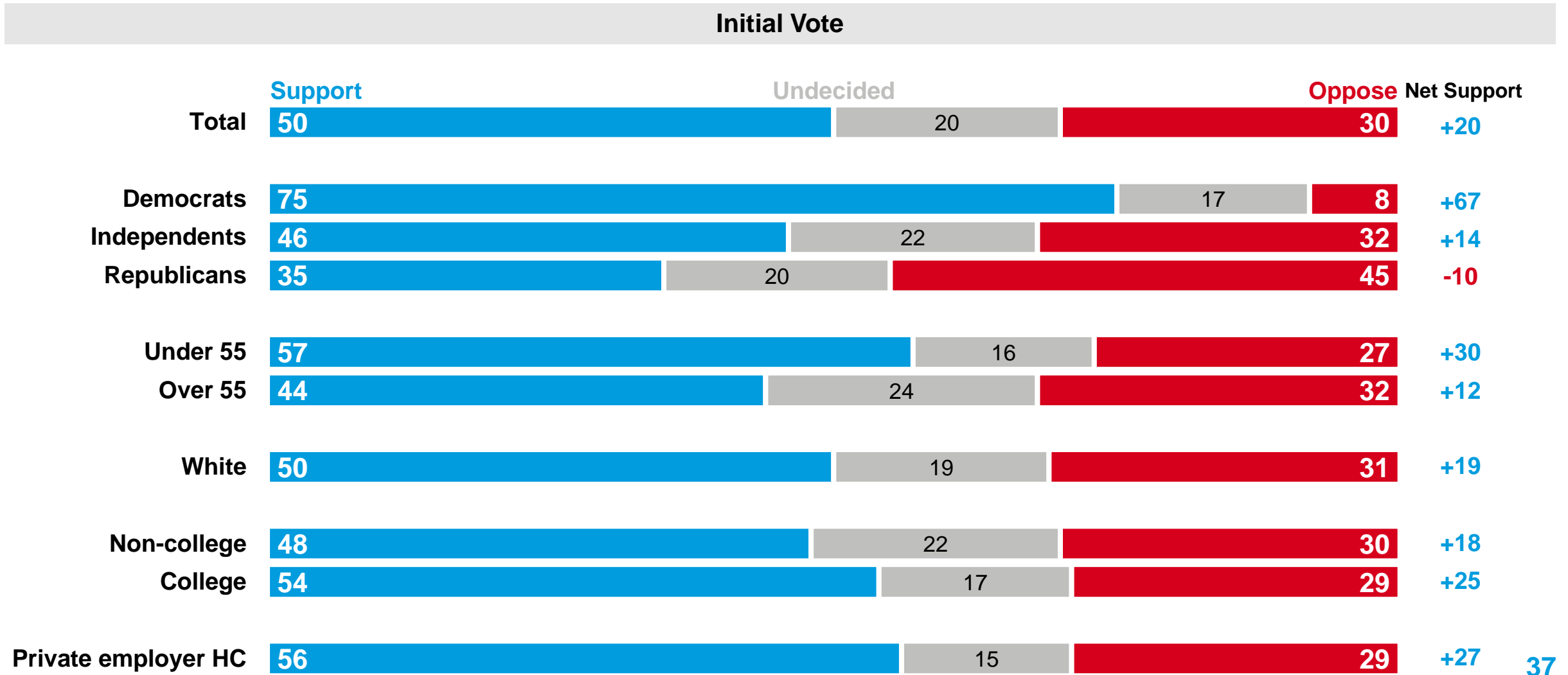
IOWA: In Iowa, we'll need to boost support among independents, older, and non-college audiences.



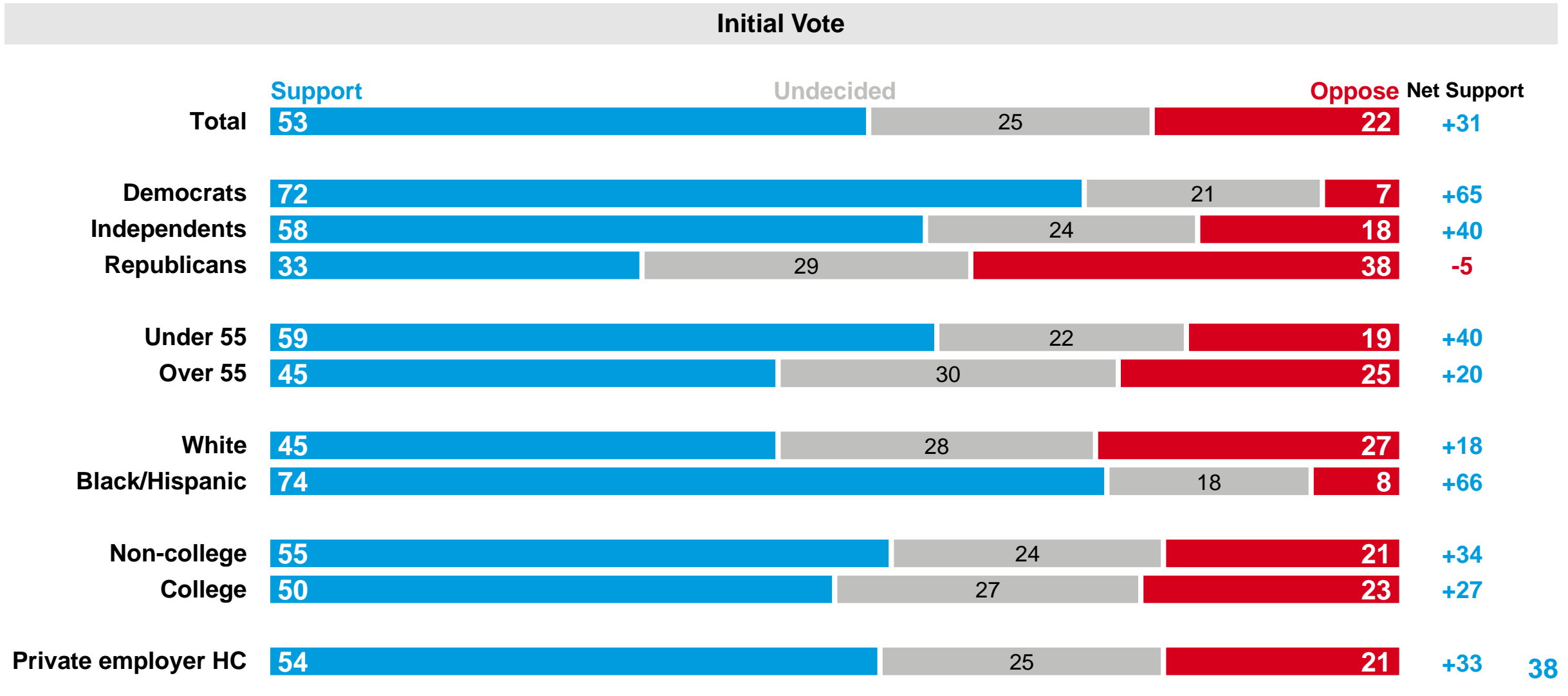
MAINE: College audiences, younger audiences, and Democrats drive support for the public option in Maine.



MONTANA: There is room to grow support for the public option among non-college and older audiences.



NORTH CAROLINA: People of color, younger audiences, and Democrats drive support for the public option. Most non-college audiences also favor it.



Surprise billing is very effective across our target states. Coronavirus and prescription drugs are also resonant in certain states.

Positive messages for the public option

Total	AZ	CO	GA	IA	ME	MT	NC	
43	47	47	47	39	40	35	46	[SURPRISE BILLS] The public option would put a stop to surprise medical bills by stopping hospitals and providers from charging out-of-network rates in situations when a patient has no choice over which hospital they go to.
			% very convincing					
40	42	41	45	36	39	30	48	[CORONAVIRUS] The public option would provide uninsured Americans access to coronavirus treatment and reduce the spread of the disease.
39	43	41	41	34	40	32	45	[PRESCRIPTION DRUGS] The public option will reduce the cost of prescription drugs by letting the government negotiate with drug companies for discounts.
39	39	43	42	36	37	30	44	[COVERAGE] The public option will ensure all Americans have access to affordable, quality health insurance by letting anyone buy into a public insurance plan.
37	40	40	41	33	35	27	41	[PRIVATE PLANS] The public option allows for people to keep their private insurance plans, including employment-based plans, while simultaneously offering public insurance to anyone who wants it.
36	38	38	36	31	39	29	43	[SAVINGS] The public option would create big cost savings as private insurance companies would be forced to compete with a public insurance option.
36	41	37	40	33	34	26	40	[VALUE BASED CARE] The public option will incentivize doctors to prescribe effective treatments like preventative care and put an end to doctors over prescribing unnecessary treatments.
32	34	34	35	27	34	27	35	[REDUCED COSTS] The public option will reduce health care costs for patients by letting the government negotiate with hospitals and health care providers.
27	26	30	29	26	30	22	29	[NONPROFIT] The public option is fundamentally a public program that has no profit motive, and is accountable to democratically elected representatives.