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**National Survey Results
2020 General Election Likely Voters**

 **McLaughlin & Associates**

**Presented By:
McLaughlin & Associates
July 20, 2020**

Highlights

Our recent survey of likely 2020 general election voters shows exceptionally strong support for Price Transparency legislation among likely voters. Support for Price Transparency Legislation receives significant majority support across key voter segments, including party, income levels, education, and age. The one voter segment where we see slight differences in *intensity* is among voters who have health coverage compared to voters without health coverage.

- The one area where we do see divergence of opinion is in the statement “I fear going to the doctor or the hospital because I could be blindsided by prices that I did not know in advance and could not afford.” The voters are split by a 1:1 margin, 47% agree to 50% disagree.
 - Among voters who have health coverage, 45% agree. Conversely, among voters who do not have coverage 69% agree that they fear going to the doctor.
 - There are also slight differences by party:
 - 35% of Republicans agree / 60% disagree
 - 58% of Democrats agree / 39% disagree
 - 48% of Independent agree / 48% disagree
- Three-quarters of the voters, 76%, agree that “If I could see prices in advance of care, I would shop for the best quality of healthcare at the lowest possible price. I would then not be blindsided by prices that I did not know in advance and could not afford. I would be more likely to receive regular and elective healthcare”. There is significant intensity behind the “agree” rating as well, as 49% strongly agree. Just 19% disagree.
 - By party, 75% of Republicans agree, 77% of Democrats agree and 77% of independents agree.
 - If they have coverage, 75% agree, but if they do not have health coverage, the agree rating increases to 88%.
 - By income, voters who earn over \$100,000 dollars, 75% agree; but among lower income voters who earn less than \$60,000, the agree rating increases just 6 points, up to 81%.

Highlights

Voters see Price Transparency as a means of ***creating more competition, lowering prices, and overall improving healthcare services.***

- Nearly 90% of voters, 88%, agree that “All organizations involved in healthcare (insurance, hospitals, doctors, etc.) should disclose all of their prices – including discounted, cash prices and insurance negotiated rates (the price providers negotiate with health plans) - across hospitals and across plans in an easily accessible place online to allow for easy shopping for health care services”. Two-thirds of the voters, 64%, *strongly agree*.
 - By party, 85% of Republicans agree, 90% of Democrats agree and 88% of independents agree.
 - Voters who have coverage, 88%, agree; as well as 91% of voters who do not have coverage.
 - Voters who earn over \$100,000 dollars: 88% agree
 - Voters who earn between \$60K to \$100K: 91% agree
 - Voters who earn under \$60K: 87% agree
- Voters clearly see competition as the best way to lower costs and improve quality. “Price transparency in health care would lead to more competition between providers and between health plans, which would improve quality while lowering health care prices and lowering the cost of health coverage.” 82% agree / 12% disagree.
 - More than half the voters, 54%, strongly agree.
 - Those who fear health care costs – 88% agree / 8% disagree
 - Those who do NOT fear health care costs – 79% agree / 16% disagree

Highlights

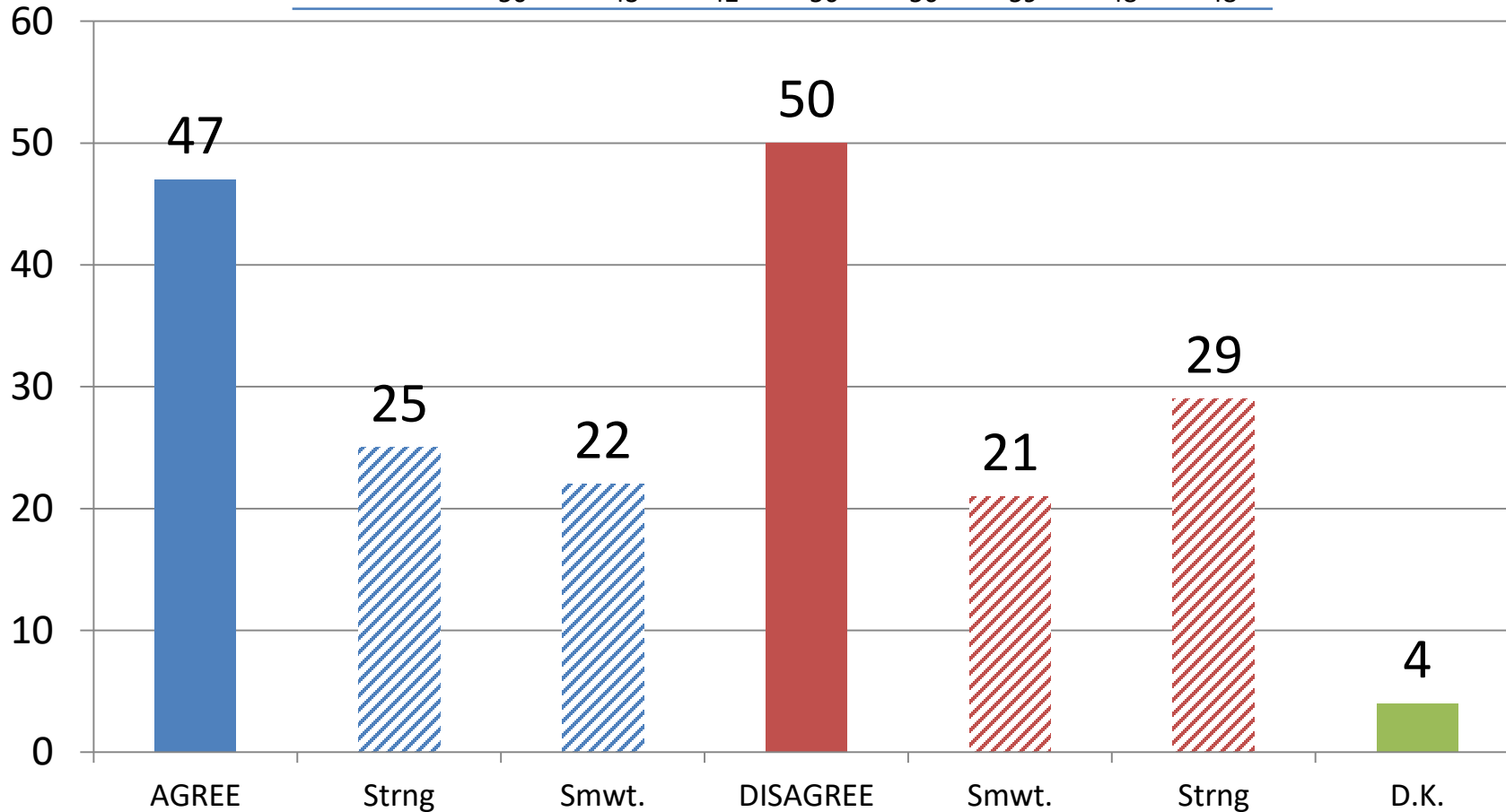
There is a ***strong urgency to pass healthcare price transparency into law***; and further, voters would reward candidates who voted to include price transparency in the next COVID-19 stimulus bill.

- Six of ten voters, 58%, believe price transparency should be ***passed into law now***, as opposed to 31% who believe it should be delayed.
- Voting to include price transparency in the next COVID-19 stimulus bill is a persuasive issue for voters in the upcoming 2020 elections. Two-thirds of the voters, ***66%, are more likely to vote for a candidate for United States Senate*** if they voted to include price transparency in the next COVID-19 stimulus bill, while only 9% are less likely.
 - Six of ten Republican voters, 59%, agree with the statement, while just 15% if Republicans disagree.
 - Of the 6 of 10 voters who want health care price transparency passed now, 78% are ***more likely to vote for a candidate wo supported including price transparency in the next COVID-19 stimulus bill***.
- Supporting Price Transparency legislation would broaden voter appeal and specifically benefit Republican candidates for United States Senate. By a better than 2:1 margin, independent voters are more likely to vote for a Republican if they knew he or she voted to include price transparency in the next COVID-19 stimulus bill, 45% more likely to 21% less likely. Independent voters will be critical to winning in the upcoming November elections.
- Seven of ten voters, 68%, are less likely to vote for a candidate who receives contributions from the health care industry special interest, such as lobbyist and Wall Street.

Agree / Disagree:

“I fear going to the doctor or the hospital because I could be blindsided by prices that I did not know in advance and could not afford.”

| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|-----------------|-------|----|----|----|----|----|----|----|
| Agree | 47 | 54 | 53 | 42 | 38 | 41 | 47 | 49 |
| Disagree | 50 | 43 | 42 | 56 | 56 | 59 | 48 | 48 |

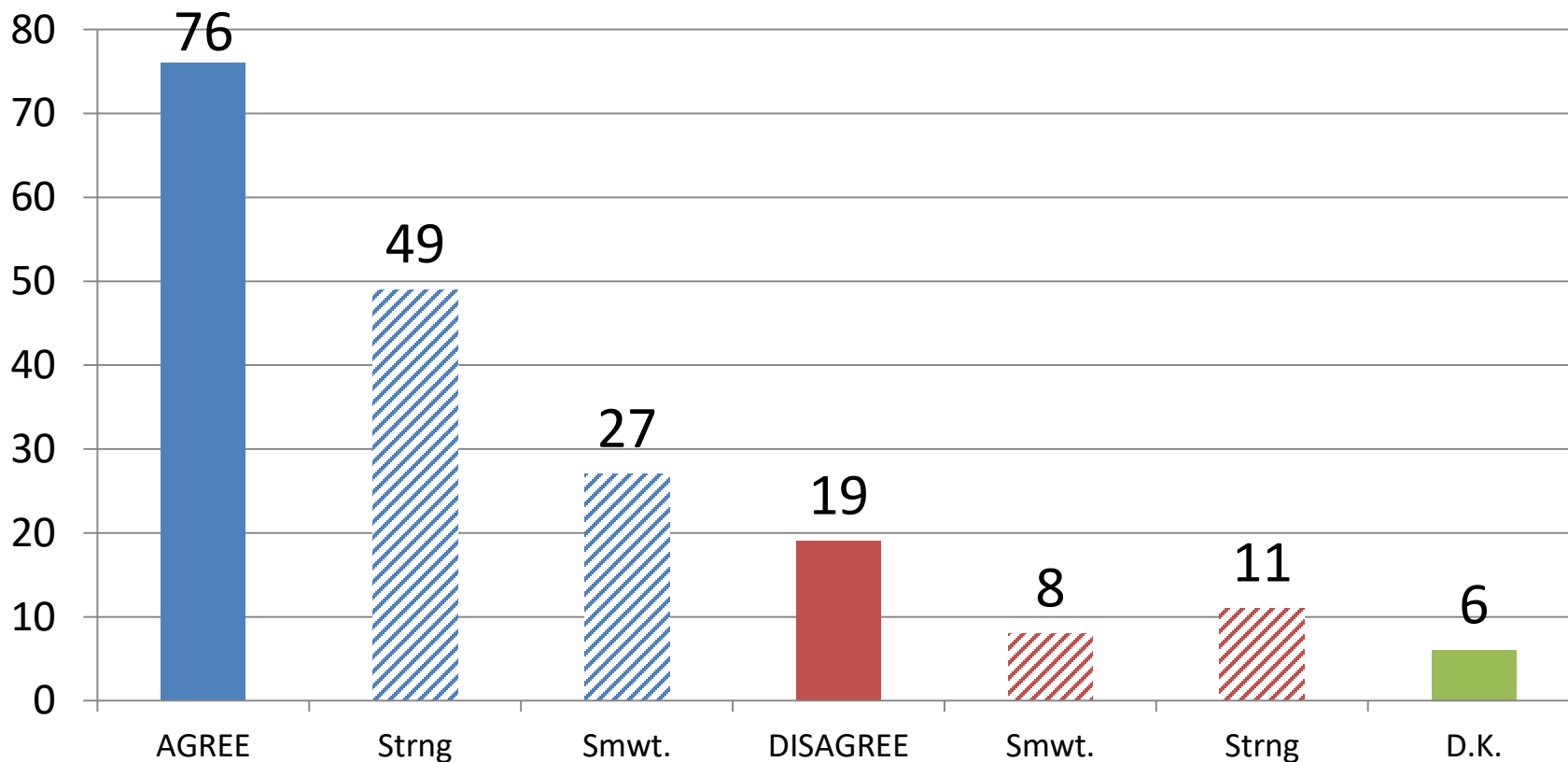


| | Agree | Disagree |
|--------------------------------|-------|----------|
| Party – GOP | 35 | 60 |
| Party – Dem | 58 | 39 |
| Party – Ind. | 48 | 48 |
| Party – Male Ind. | 48 | 47 |
| Party – Female Ind. | 48 | 49 |
| Fear Hospital Costs – Agree | 100 | - |
| Fear Hospital Costs – Disagree | - | 100 |
| Pass Transparency – Now | 51 | 45 |
| Pass Transparency – Wait | 41 | 55 |
| Healthcare Coverage – Yes | 45 | 51 |
| Healthcare Coverage – No | 69 | 27 |
| Married Women | 41 | 54 |
| Women / College Grad | 44 | 54 |
| Education – Less than College | 51 | 44 |
| Education – College Grad | 44 | 54 |
| Income: Under \$60K | 55 | 41 |
| Income: \$60K to \$100K | 51 | 48 |
| Income: Over \$100K | 38 | 60 |
| Male | 45 | 51 |
| Female | 48 | 48 |
| Age - Under 40 | 59 | 39 |
| Age – 40 – 55 | 47 | 50 |
| Age – 55 – 65 | 44 | 53 |
| Age – Over 65 | 32 | 61 |
| Race – White | 45 | 51 |
| Race – Black / AA | 50 | 45 |
| Race – Hispanic | 55 | 44 |

Agree / Disagree:

“If I could see prices in advance of care, I would shop for the best quality of healthcare at the lowest possible price. I would then not be blindsided by prices that I did not know in advance and could not afford. I would be more likely to receive regular and elective healthcare.”

| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|-----------------|-------|----|----|----|----|----|----|----|
| Agree | 76 | 77 | 79 | 79 | 70 | 71 | 76 | 77 |
| Disagree | 19 | 16 | 16 | 18 | 26 | 24 | 17 | 17 |

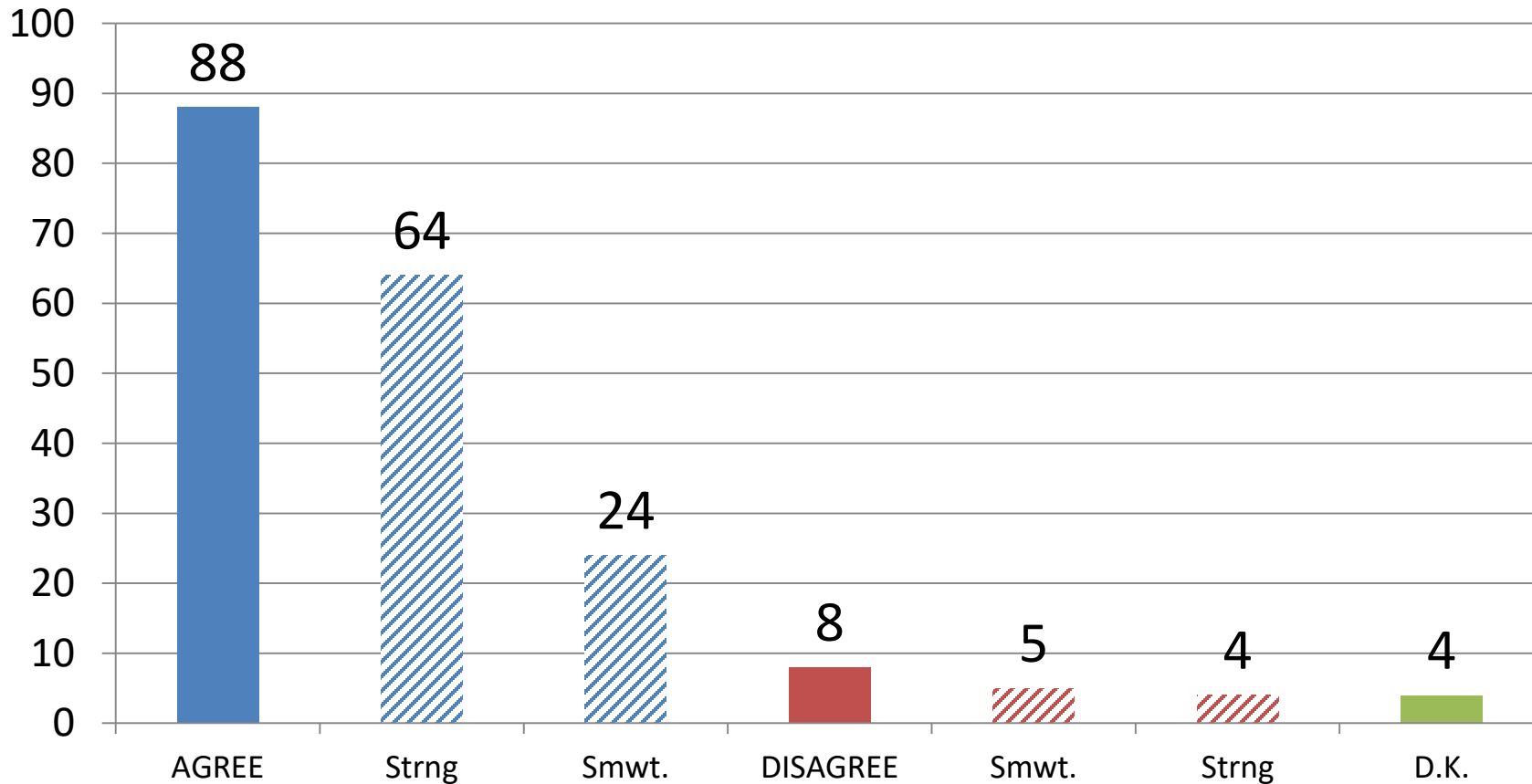


| | Agree | Disagree |
|--------------------------------|-------|----------|
| Party – GOP | 75 | 20 |
| Party – Dem | 77 | 17 |
| Party – Ind. | 77 | 18 |
| Party – Male Ind. | 76 | 19 |
| Party – Female Ind. | 77 | 17 |
| Fear Hospital Costs – Agree | 91 | 7 |
| Fear Hospital Costs – Disagree | 62 | 31 |
| Pass Transparency – Now | 82 | 15 |
| Pass Transparency – Wait | 67 | 26 |
| Healthcare Coverage – Yes | 75 | 20 |
| Healthcare Coverage – No | 88 | 8 |
| Married Women | 76 | 19 |
| Women / College Grad | 74 | 21 |
| Education – Less than College | 79 | 16 |
| Education – College Grad | 74 | 21 |
| Income: Under \$60K | 81 | 15 |
| Income: \$60K to \$100K | 79 | 16 |
| Income: Over \$100K | 75 | 22 |
| Male | 74 | 20 |
| Female | 77 | 18 |
| Age - Under 40 | 84 | 12 |
| Age – 40 – 55 | 77 | 18 |
| Age – 55 – 65 | 73 | 22 |
| Age – Over 65 | 65 | 27 |
| Race – White | 75 | 19 |
| Race – Black / AA | 77 | 18 |
| Race – Hispanic | 81 | 13 |

Agree / Disagree:

“All organizations involved in healthcare (insurance, hospitals, doctors, etc.) should disclose all of their prices – including discounted, cash prices and insurance negotiated rates (the price providers negotiate with health plans) - across hospitals and across plans in an easily accessible place online to allow for easy shopping for health care services.”

| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|-----------------|-------|----|----|----|----|----|----|----|
| Agree | 88 | 91 | 87 | 91 | 83 | 87 | 86 | 90 |
| Disagree | 8 | 8 | 8 | 8 | 11 | 9 | 8 | 8 |

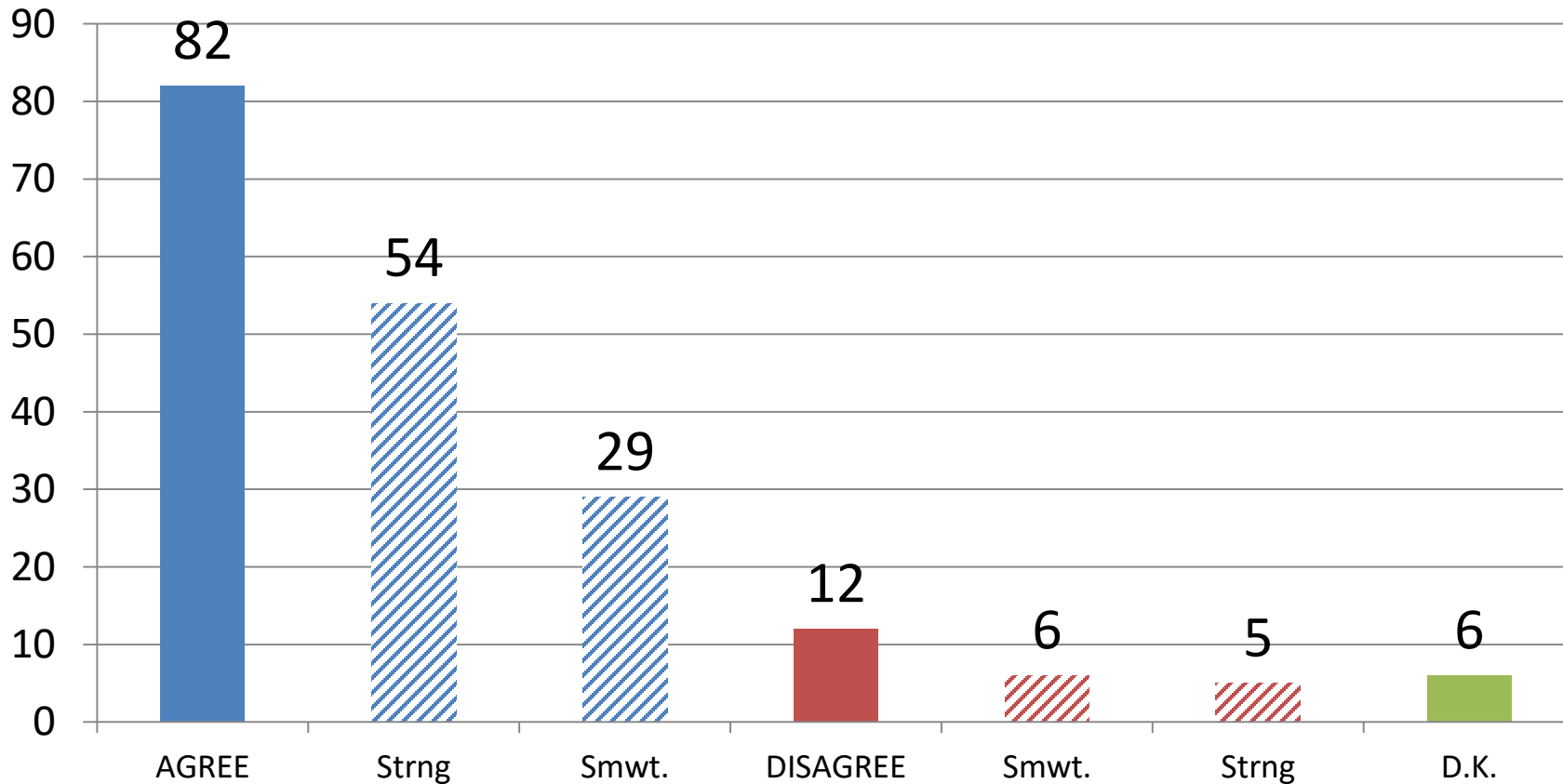


| | Agree | Disagree |
|--------------------------------|-------|----------|
| Party – GOP | 85 | 12 |
| Party – Dem | 90 | 6 |
| Party – Ind. | 88 | 7 |
| Party – Male Ind. | 86 | 8 |
| Party – Female Ind. | 91 | 6 |
| Fear Hospital Costs – Agree | 95 | 3 |
| Fear Hospital Costs – Disagree | 84 | 13 |
| Pass Transparency – Now | 93 | 4 |
| Pass Transparency – Wait | 82 | 14 |
| Healthcare Coverage – Yes | 88 | 8 |
| Healthcare Coverage – No | 91 | 6 |
| Married Women | 89 | 8 |
| Women / College Grad | 89 | 8 |
| Education – Less than College | 86 | 10 |
| Education – College Grad | 89 | 8 |
| Income: Under \$60K | 87 | 7 |
| Income: \$60K to \$100K | 91 | 7 |
| Income: Over \$100K | 88 | 10 |
| Male | 88 | 8 |
| Female | 88 | 9 |
| Age - Under 40 | 95 | 3 |
| Age – 40 – 55 | 85 | 11 |
| Age – 55 – 65 | 92 | 4 |
| Age – Over 65 | 80 | 14 |
| Race – White | 88 | 8 |
| Race – Black / AA | 86 | 10 |
| Race – Hispanic | 89 | 7 |

Agree / Disagree:

“Price transparency in health care would lead to more competition between providers and between health plans, which would improve quality while lowering health care prices and lowering the cost of health coverage.”

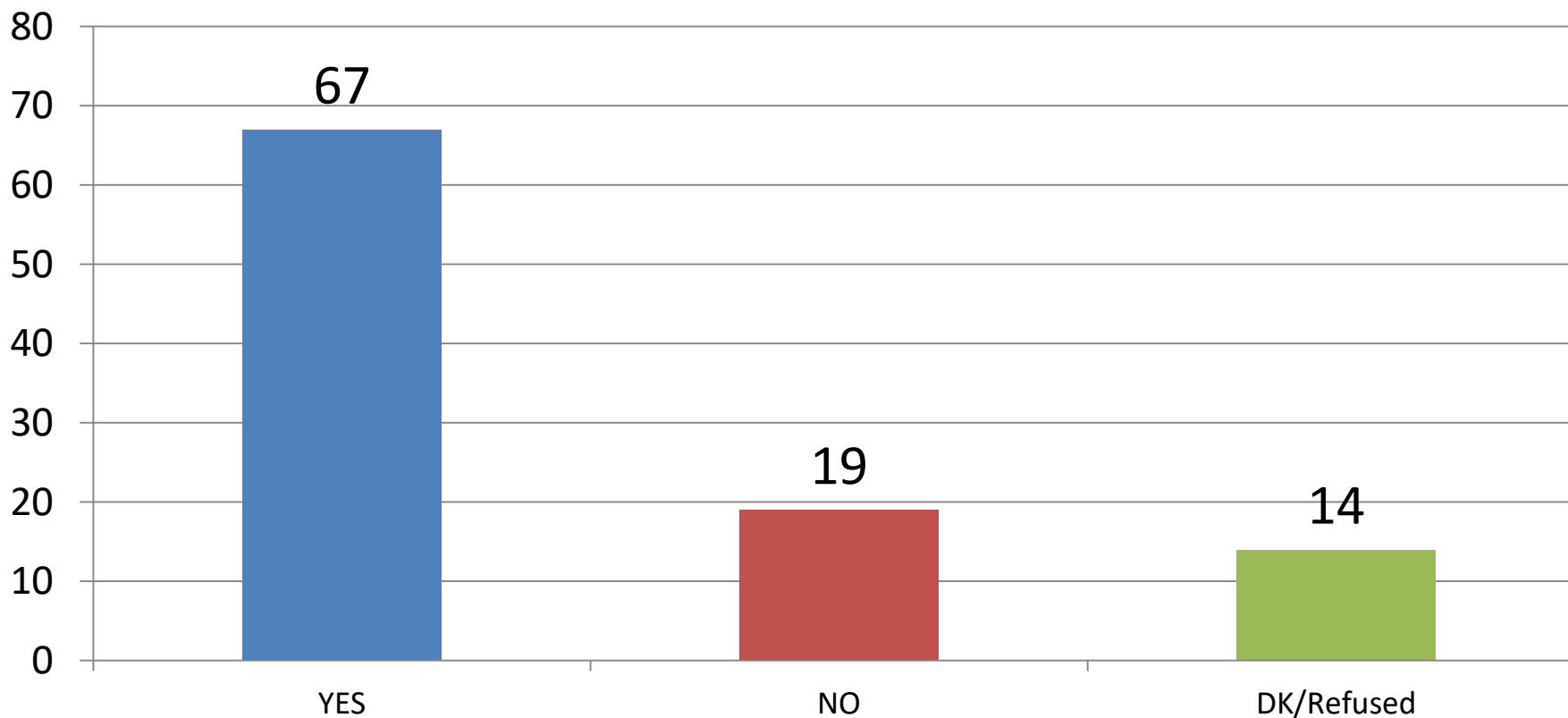
| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|-----------------|-------|----|----|----|----|----|----|----|
| Agree | 82 | 82 | 81 | 86 | 80 | 78 | 79 | 86 |
| Disagree | 12 | 12 | 10 | 9 | 14 | 18 | 14 | 9 |



| | Agree | Disagree |
|--------------------------------|-------|----------|
| Party – GOP | 84 | 12 |
| Party – Dem | 83 | 10 |
| Party – Ind. | 80 | 12 |
| Party – Male Ind. | 81 | 11 |
| Party – Female Ind. | 80 | 13 |
| Fear Hospital Costs – Agree | 88 | 8 |
| Fear Hospital Costs – Disagree | 79 | 16 |
| Pass Transparency – Now | 87 | 8 |
| Pass Transparency – Wait | 76 | 18 |
| Healthcare Coverage – Yes | 82 | 12 |
| Healthcare Coverage – No | 88 | 10 |
| Married Women | 81 | 12 |
| Women / College Grad | 81 | 13 |
| Education – Less than College | 83 | 11 |
| Education – College Grad | 82 | 12 |
| Income: Under \$60K | 83 | 10 |
| Income: \$60K to \$100K | 84 | 12 |
| Income: Over \$100K | 85 | 11 |
| Male | 83 | 12 |
| Female | 82 | 11 |
| Age - Under 40 | 86 | 8 |
| Age – 40 – 55 | 82 | 11 |
| Age – 55 – 65 | 81 | 13 |
| Age – Over 65 | 78 | 16 |
| Race – White | 82 | 11 |
| Race – Black / AA | 85 | 12 |
| Race – Hispanic | 81 | 12 |

Do you believe the hospital lobbying groups and special interest groups should drop their lawsuits against healthcare price transparency?

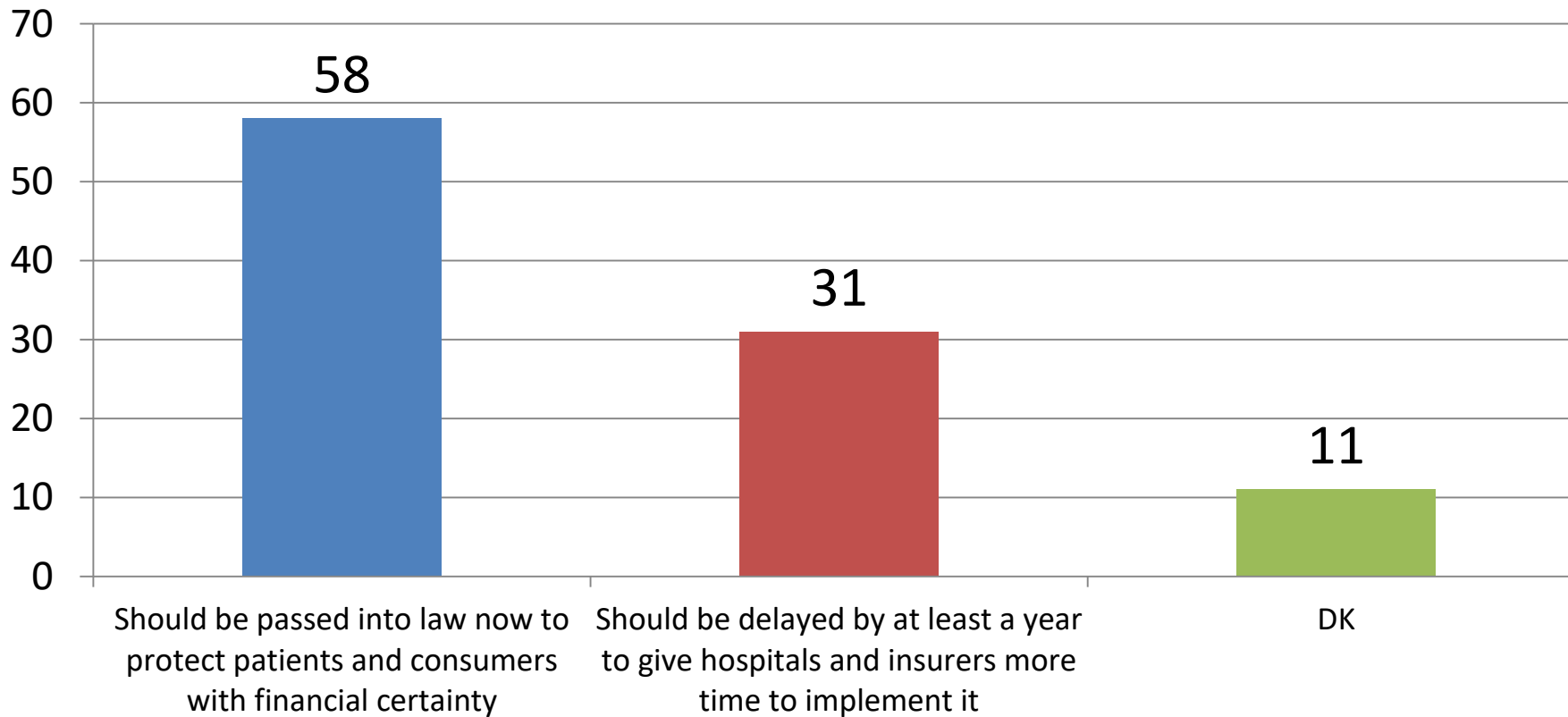
| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|------------|-------|----|----|----|----|----|----|----|
| Yes | 67 | 63 | 72 | 68 | 63 | 63 | 64 | 71 |
| No | 19 | 20 | 19 | 21 | 17 | 23 | 23 | 17 |



| | YES | NO |
|--------------------------------|-----|----|
| Party – GOP | 71 | 17 |
| Party – Dem | 62 | 24 |
| Party – Ind. | 68 | 18 |
| Party – Male Ind. | 71 | 16 |
| Party – Female Ind. | 64 | 20 |
| Fear Hospital Costs – Agree | 68 | 19 |
| Fear Hospital Costs – Disagree | 66 | 20 |
| Pass Transparency – Now | 72 | 20 |
| Pass Transparency – Wait | 62 | 19 |
| Healthcare Coverage – Yes | 67 | 19 |
| Healthcare Coverage – No | 64 | 26 |
| Married Women | 68 | 18 |
| Women / College Grad | 62 | 23 |
| Education – Less than College | 69 | 18 |
| Education – College Grad | 65 | 20 |
| Income: Under \$60K | 70 | 18 |
| Income: \$60K to \$100K | 65 | 24 |
| Income: Over \$100K | 70 | 16 |
| Male | 69 | 17 |
| Female | 65 | 21 |
| Age - Under 40 | 69 | 19 |
| Age – 40 – 55 | 66 | 22 |
| Age – 55 – 65 | 68 | 16 |
| Age – Over 65 | 63 | 21 |
| Race – White | 67 | 18 |
| Race – Black / AA | 68 | 18 |
| Race – Hispanic | 56 | 32 |

Do you believe that healthcare price transparency should be passed into law now to protect patients and consumers with financial certainty, Or, do you believe it should be delayed by at least a year to give hospitals and insurers more time to implement it?

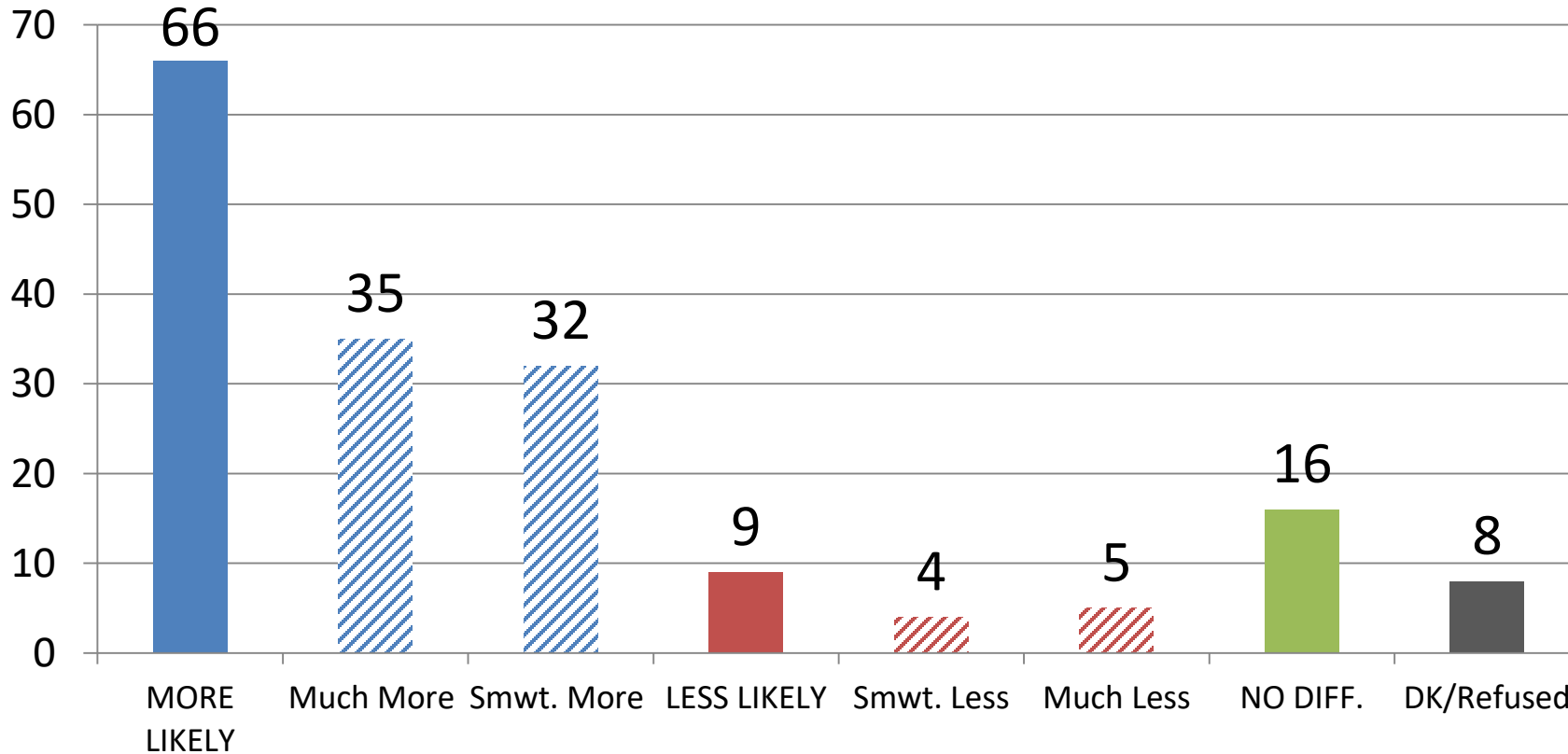
| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|------------|-------|----|----|----|----|----|----|----|
| Yes | 58 | 59 | 62 | 64 | 55 | 58 | 51 | 57 |
| No | 31 | 31 | 32 | 26 | 30 | 28 | 43 | 31 |



| | Now | Delayed |
|--------------------------------|-----|---------|
| Party – GOP | 55 | 32 |
| Party – Dem | 66 | 25 |
| Party – Ind. | 56 | 35 |
| Party – Male Ind. | 58 | 31 |
| Party – Female Ind. | 53 | 39 |
| Fear Hospital Costs – Agree | 65 | 27 |
| Fear Hospital Costs – Disagree | 53 | 34 |
| Pass Transparency – Now | 100 | - |
| Pass Transparency – Wait | - | 100 |
| Healthcare Coverage – Yes | 58 | 31 |
| Healthcare Coverage – No | 67 | 29 |
| Married Women | 56 | 33 |
| Women / College Grad | 60 | 29 |
| Education – Less than College | 60 | 30 |
| Education – College Grad | 57 | 31 |
| Income: Under \$60K | 64 | 28 |
| Income: \$60K to \$100K | 60 | 29 |
| Income: Over \$100K | 56 | 36 |
| Male | 58 | 30 |
| Female | 59 | 31 |
| Age - Under 40 | 62 | 30 |
| Age – 40 – 55 | 57 | 32 |
| Age – 55 – 65 | 58 | 28 |
| Age – Over 65 | 56 | 32 |
| Race – White | 57 | 31 |
| Race – Black / AA | 66 | 27 |
| Race – Hispanic | 60 | 34 |

Would you be more likely or less likely to vote for a candidate for US Senate if they voted to include price transparency for hospitals and insurance companies in the next COVID-19 stimulus bill?

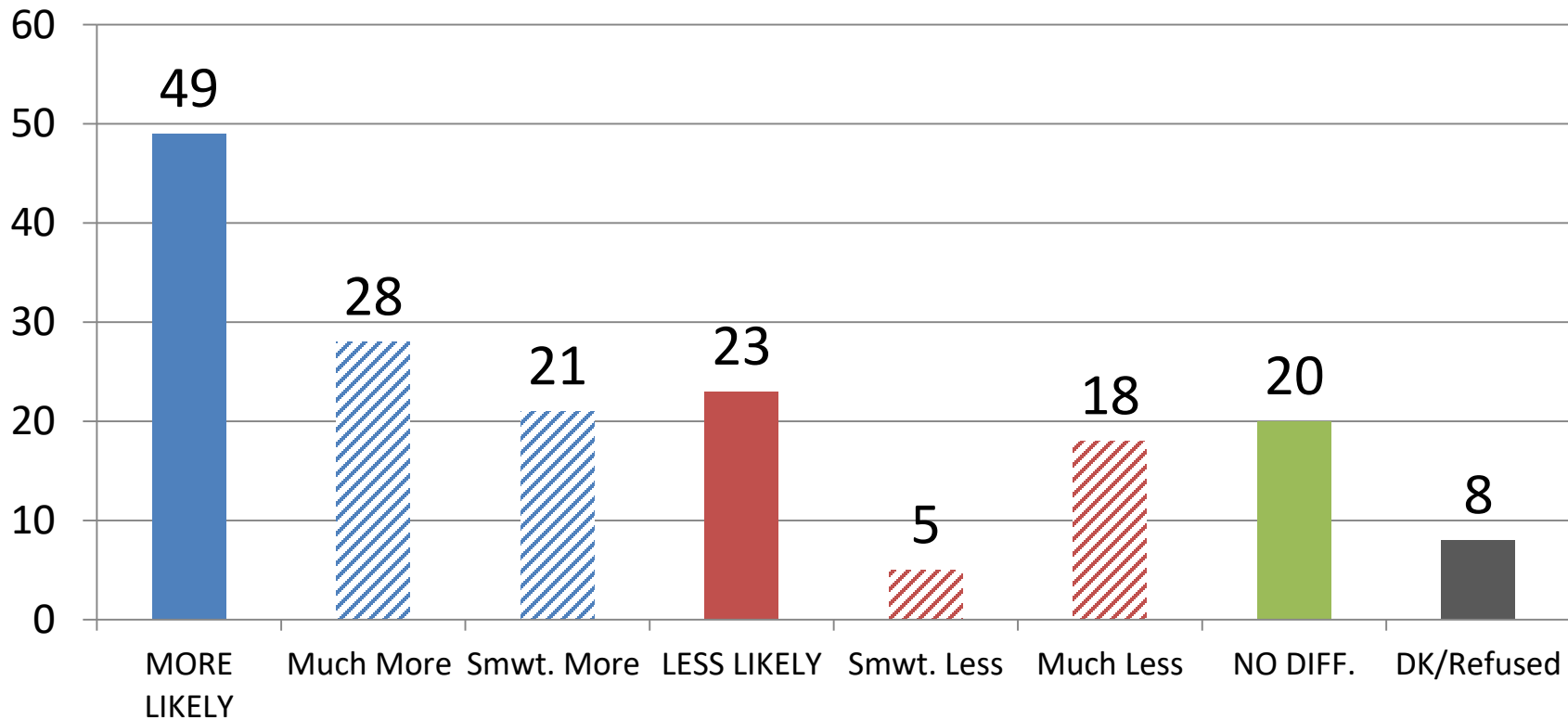
| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|--------------------|-------|----|----|----|----|----|----|----|
| More Likely | 66 | 68 | 72 | 75 | 60 | 63 | 55 | 64 |
| Less Likely | 9 | 9 | 9 | 9 | 10 | 11 | 8 | 11 |



| | More | Less |
|--------------------------------|------|------|
| Party – GOP | 59 | 15 |
| Party – Dem | 75 | 5 |
| Party – Ind. | 66 | 8 |
| Party – Male Ind. | 66 | 10 |
| Party – Female Ind. | 67 | 6 |
| Fear Hospital Costs – Agree | 74 | 7 |
| Fear Hospital Costs – Disagree | 60 | 12 |
| Pass Transparency – Now | 78 | 5 |
| Pass Transparency – Wait | 53 | 16 |
| Healthcare Coverage – Yes | 66 | 10 |
| Healthcare Coverage – No | 67 | 6 |
| Married Women | 61 | 9 |
| Women / College Grad | 66 | 8 |
| Education – Less than College | 67 | 10 |
| Education – College Grad | 66 | 9 |
| Income: Under \$60K | 75 | 7 |
| Income: \$60K to \$100K | 70 | 9 |
| Income: Over \$100K | 62 | 10 |
| Male | 66 | 11 |
| Female | 67 | 8 |
| Age - Under 40 | 73 | 8 |
| Age – 40 – 55 | 66 | 13 |
| Age – 55 – 65 | 63 | 9 |
| Age – Over 65 | 63 | 8 |
| Race – White | 64 | 10 |
| Race – Black / AA | 76 | 8 |
| Race – Hispanic | 74 | 7 |

Now, would you be more likely or less likely to vote for a Republican candidate for US Senate if he or she voted to include price transparency for hospitals and insurance companies in the next COVID-19 stimulus bill?

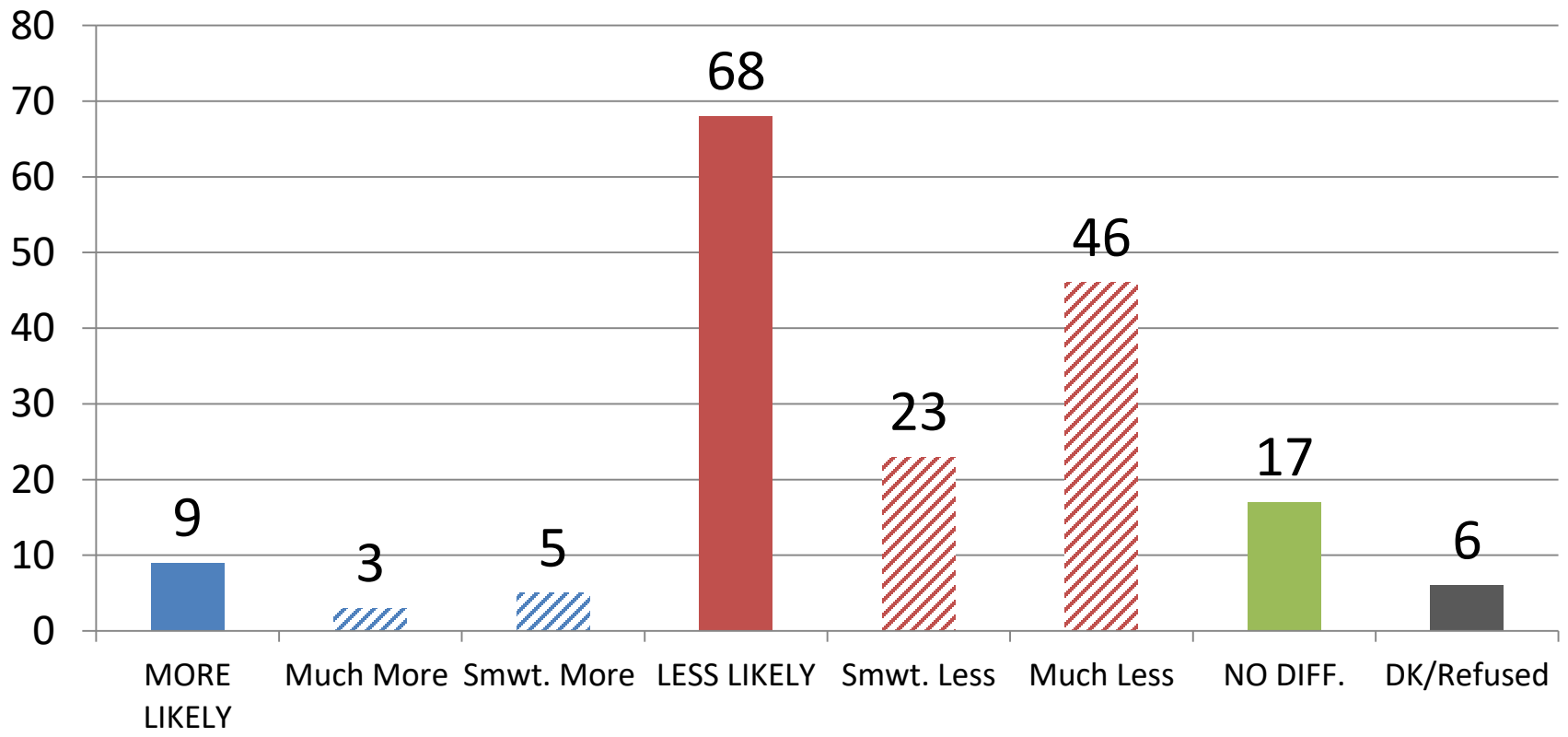
| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|--------------------|-------|----|----|----|----|----|----|----|
| More Likely | 49 | 52 | 48 | 54 | 46 | 46 | 47 | 49 |
| Less Likely | 23 | 22 | 23 | 24 | 26 | 29 | 16 | 23 |



| | More | Less |
|--------------------------------|------|------|
| Party – GOP | 70 | 8 |
| Party – Dem | 32 | 41 |
| Party – Ind. | 45 | 21 |
| Party – Male Ind. | 48 | 20 |
| Party – Female Ind. | 43 | 22 |
| Fear Hospital Costs – Agree | 54 | 22 |
| Fear Hospital Costs – Disagree | 45 | 25 |
| Pass Transparency – Now | 54 | 24 |
| Pass Transparency – Wait | 46 | 23 |
| Healthcare Coverage – Yes | 49 | 24 |
| Healthcare Coverage – No | 52 | 18 |
| Married Women | 48 | 23 |
| Women / College Grad | 42 | 26 |
| Education – Less than College | 56 | 22 |
| Education – College Grad | 44 | 24 |
| Income: Under \$60K | 53 | 25 |
| Income: \$60K to \$100K | 56 | 19 |
| Income: Over \$100K | 44 | 24 |
| Male | 52 | 20 |
| Female | 47 | 26 |
| Age - Under 40 | 57 | 18 |
| Age – 40 – 55 | 48 | 24 |
| Age – 55 – 65 | 45 | 28 |
| Age – Over 65 | 44 | 27 |
| Race – White | 49 | 23 |
| Race – Black / AA | 40 | 30 |
| Race – Hispanic | 57 | 20 |

Would you be more or less likely to support a Senator or Member of Congress if you knew he or she received campaign contributions from healthcare industry lobbyists, special interest groups, private equity firms, and other Wall Street executives?

| | TOTAL | AZ | CO | GA | IA | ME | MT | NC |
|--------------------|-------|----|----|----|----|----|----|----|
| More Likely | 9 | 8 | 12 | 9 | 9 | 8 | 12 | 6 |
| Less Likely | 68 | 67 | 70 | 72 | 69 | 73 | 58 | 68 |



| | More | Less |
|--------------------------------|------|------|
| Party – GOP | 8 | 65 |
| Party – Dem | 8 | 77 |
| Party – Ind. | 11 | 65 |
| Party – Male Ind. | 10 | 65 |
| Party – Female Ind. | 12 | 65 |
| Fear Hospital Costs – Agree | 11 | 72 |
| Fear Hospital Costs – Disagree | 7 | 67 |
| Pass Transparency – Now | 9 | 75 |
| Pass Transparency – Wait | 9 | 62 |
| Healthcare Coverage – Yes | 9 | 69 |
| Healthcare Coverage – No | 12 | 62 |
| Married Women | 6 | 69 |
| Women / College Grad | 6 | 72 |
| Education – Less than College | 11 | 67 |
| Education – College Grad | 7 | 69 |
| Income: Under \$60K | 13 | 69 |
| Income: \$60K to \$100K | 10 | 72 |
| Income: Over \$100K | 6 | 70 |
| Male | 10 | 64 |
| Female | 8 | 72 |
| Age - Under 40 | 12 | 70 |
| Age – 40 – 55 | 5 | 72 |
| Age – 55 – 65 | 9 | 66 |
| Age – Over 65 | 9 | 66 |
| Race – White | 8 | 69 |
| Race – Black / AA | 11 | 69 |
| Race – Hispanic | 11 | 72 |

Voter Profile

| | Total | Pass | Wait | | Total | Pass | Wait | | Total | Pass | Wait |
|--------------------------|-------|------|------|-----------------------|-------|------|------|--------------------|-------|-------|-------|
| Voter Likelihood: | | | | Gender: | | | | Health Care | | | |
| Definitely | 85 | 85 | 83 | Male | 47 | 46 | 46 | Yes | 92 | 91 | 93 |
| Very Likely | 13 | 13 | 15 | Female | 53 | 54 | 54 | No | 7 | 8 | 7 |
| Somewhat Likely | 2 | 2 | 2 | | | | | Income | | | |
| | | | | Race: | | | | Under \$20K | 7 | 8 | 7 |
| Party: | | | | White | 78 | 77 | 78 | \$20-\$40K | 14 | 17 | 12 |
| Republican | 33 | 31 | 35 | Hispanic | 7 | 7 | 8 | \$40K - \$60K | 13 | 14 | 13 |
| Democrat | 33 | 37 | 26 | A.A./Black | 11 | 13 | 10 | \$60K - \$100K | 13 | 13 | 13 |
| Independent | 30 | 29 | 34 | | | | | \$100K - \$150K | 9 | 9 | 8 |
| | | | | Marital Status | | | | \$150K - \$200K | 13 | 11 | 16 |
| Ideology: | | | | Single | 25 | 28 | 22 | \$200-\$250K | 5 | 6 | 4 |
| Liberal | 25 | 30 | 17 | Separated | 1 | 1 | 1 | Over \$250K | 6 | 6 | 8 |
| Moderate | 33 | 31 | 40 | Divorced | 7 | 8 | 6 | | | | |
| Conservative | 35 | 33 | 37 | Married | 59 | 56 | 63 | Age: | | | |
| | | | | Widow | 6 | 5 | 7 | 18-29 | 15 | 16 | 15 |
| Area | | | | | | | | 30-40 | 17 | 18 | 16 |
| Urban | 22 | 24 | 20 | | | | | 41-55 | 25 | 24 | 25 |
| Suburban | 43 | 43 | 44 | | | | | 56-65 | 19 | 19 | 17 |
| Rural | 33 | 32 | 34 | | | | | 66-75 | 23 | 22 | 24 |
| | | | | | | | | MEAN | 49.61 | 49.01 | 49.81 |

Voter Profile

| | Total | Pass | Wait | | Total | Pass | Wait |
|----------------|-------|------|------|--------------------------|-------|------|------|
| Region | | | | Education | | | |
| Arizona | 17 | 17 | 17 | Less/College Grad | 40 | 41 | 40 |
| Colorado | 17 | 18 | 17 | Less/HS Diploma | 2 | 1 | 1 |
| Georgia | 17 | 18 | 14 | High School Grad | 14 | 14 | 15 |
| Iowa | 17 | 16 | 16 | Some College Grad/Trade | 25 | 26 | 24 |
| Maine | 8 | 8 | 8 | College Grad | 60 | 59 | 60 |
| Montana | 8 | 7 | 12 | College Grad | 37 | 37 | 35 |
| North Carolina | 17 | 16 | 17 | Post Grad Degree | 23 | 21 | 26 |
| | | | | | | | |
| | | | | Employment | | | |
| | | | | Employed | 61 | 62 | 61 |
| | | | | Full Time | 53 | 54 | 53 |
| | | | | Part Time | 8 | 8 | 8 |
| | | | | Homemaker | 4 | 4 | 3 |
| | | | | Student | 2 | 1 | 3 |
| | | | | Retired | 26 | 25 | 26 |
| | | | | Not Employed | 6 | 6 | 6 |



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