

Findings from a Survey of 800 Likely 2014 General Election Voters in Missouri

Methodology

- Lake Research Partners and The Tarrance Group designed and administered this survey, which was conducted by telephone using professional interviewers. The survey reached 800 adults in Missouri. The survey was conducted August 17th – August 20th, 2014. The margin of error for this poll is +/-3.5%.
- Telephone numbers for the sample were generated from a file of registered voters. The sample was stratified geographically to reflect the expected turnout of voters in the 2014 General Election. The data were weighted slightly by party identification, gender, age, education, race, and region.
- All sample surveys are subject to possible sampling error. The size of the sampling error depends upon both the total number of respondents in the survey and the percentage distribution of responses to a particular question.

Key Findings

- This most recent study shows an electorate highly concerned about the accessibility of affordable health care, and supportive of state government action to ensure access to quality, affordable care, even if doing so requires raising taxes. At the same time, however, voters are cautious about change in the health care system.
- Medicaid remains highly popular in Missouri. In part, this is true because Missourians perceive Medicaid as distinct from the federal marketplace and other less popular and less defined ACA provisions.
- Support for expanding Medicaid is broad and intense, though the political environment surrounding this debate remains fraught. While the margin of support appears slightly wider than it was last year, the overall differences are statistically negligible (53% support compared to 52% in 2013).
- A majority of Missouri voters (51%) opposes the ACA (36% support it), slightly less so than when the law is referred to as Obamacare (34% favor, 56% oppose). These numbers closely match last year's data. Missourians still marginally favor the marketplace once they hear a brief description.

The Political Context and Perceptions of Health Care in Missouri

- Rising health care costs remain in the top-tier of voters' economic agenda, even as other personal and national economic priorities have gradually taken precedence. Concerns over rising health care costs are cited by 12% as the most pressing economic issue, but now share space with concerns over the rising costs of daily expenses (22%), the federal budget deficit and national debt (15%), and unemployment and lack of job security (12%). Even as recently as last year, the margins separating concerns over health care costs from these other economic issues were statistically insignificant.
- Medicaid's image remains highly robust (61% favorable, 20% unfavorable), easily outpacing the Governor, the State Legislature, MO Health Net (less than half are familiar with this term), and the marketplace.
- A plurality of voters supports the marketplace, once they hear it described briefly as a program that helps people compare health insurance benefits (46% favor, 20% oppose); a majority opposes the Legislature's move to put the federal government in charge of Missouri's own marketplace (26% favor, 54% oppose). When the legislature's decision is described as "join(ing) the federal marketplace", a smaller number—though still a plurality—opposes it (26% to 43%). Independent voters join the majority and oppose both iterations of this proposal.

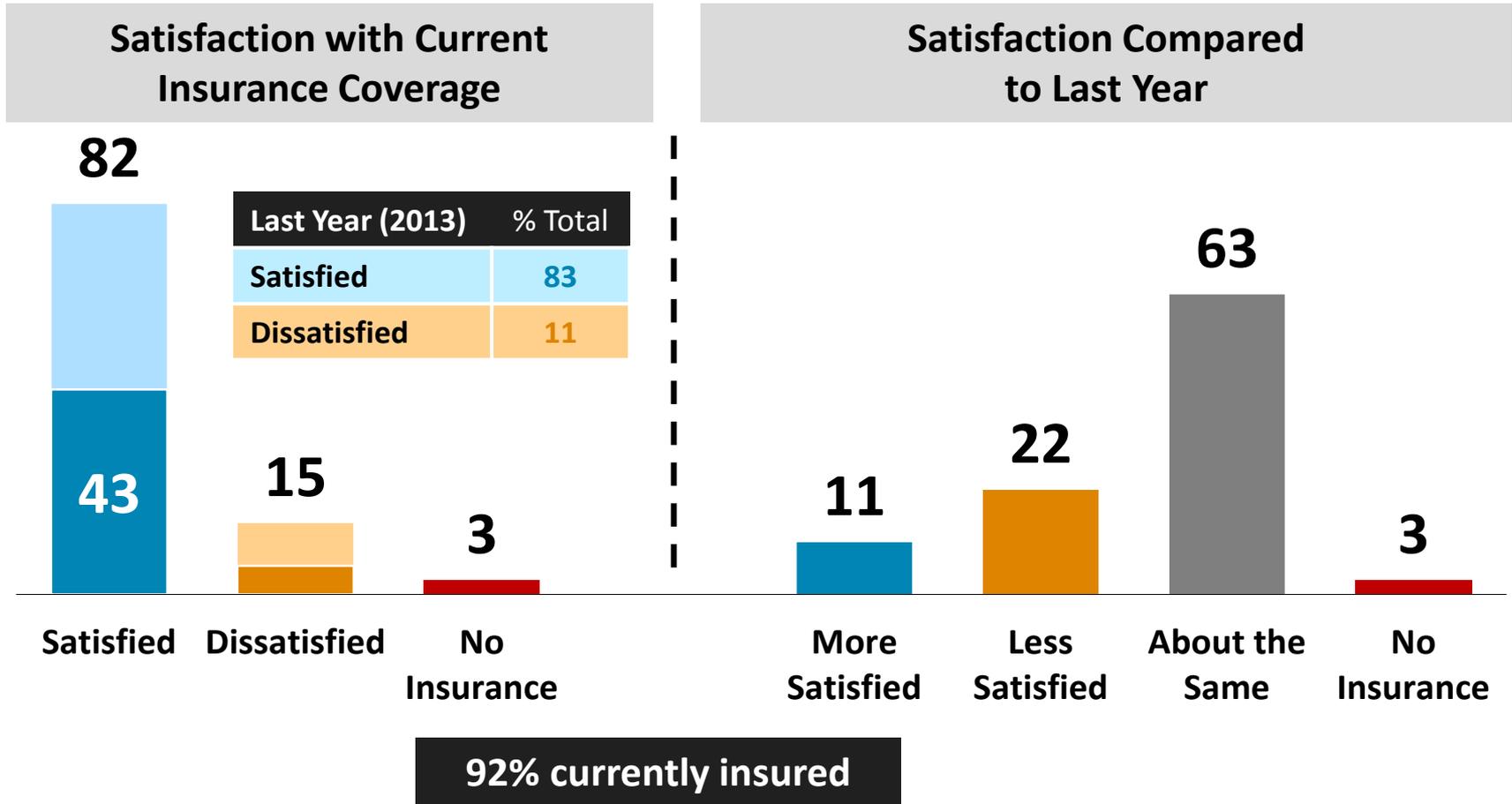
Contours of Support for Medicaid Expansion

- While change remains a frightening concept for Missourians (51% of voters are more worried about changing things too much in the health care realm), a proposal to expand Medicaid attracts majority support, including significant intensity (53% favor, 38% strongly favor). Opposition remain muted (25% and 15% oppose it strongly) and 22% of voters are undecided.
- Black voters, Democrats (especially strong partisans and Democratic women), Medicaid recipients, those with no health insurance, and highly educated voters are the most prominent supporters of Medicaid expansion. The staunchest opposition comes from certain groups of older voters (particularly whites, men, college educated), as well as Republicans, many of these subgroups still support expansion more than they oppose it.
- Simulating an engaged communications environment leaves support for expansion up by double digits (+12 when the pro-expansion argument is framed around the economic benefits to the state and to Missouri's working families and +22 when the pro-expansion argument is framed in moral terms).
- Further arguments on behalf of expansion resonate with voters and drive support to its highest level in the poll (54%).

The Economic Context for Medicaid Expansion

- Despite all the skepticism, confusion and fear of change in the health care system, Medicaid's enduring popularity in Missouri is a constant. A majority of voters opposes the ACA and relatively poor ratings for the marketplace, but voters continue to cite rising health care costs as a top economic concern and want their state government to help ensure reliable coverage for all Missourians.

The vast majority of Missouri voters reports satisfaction with their insurance coverage, and at essentially the same level as last year.



Darker colors indicate intensity.

"Thinking about your current health insurance coverage, how satisfied are you with it: very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied?"

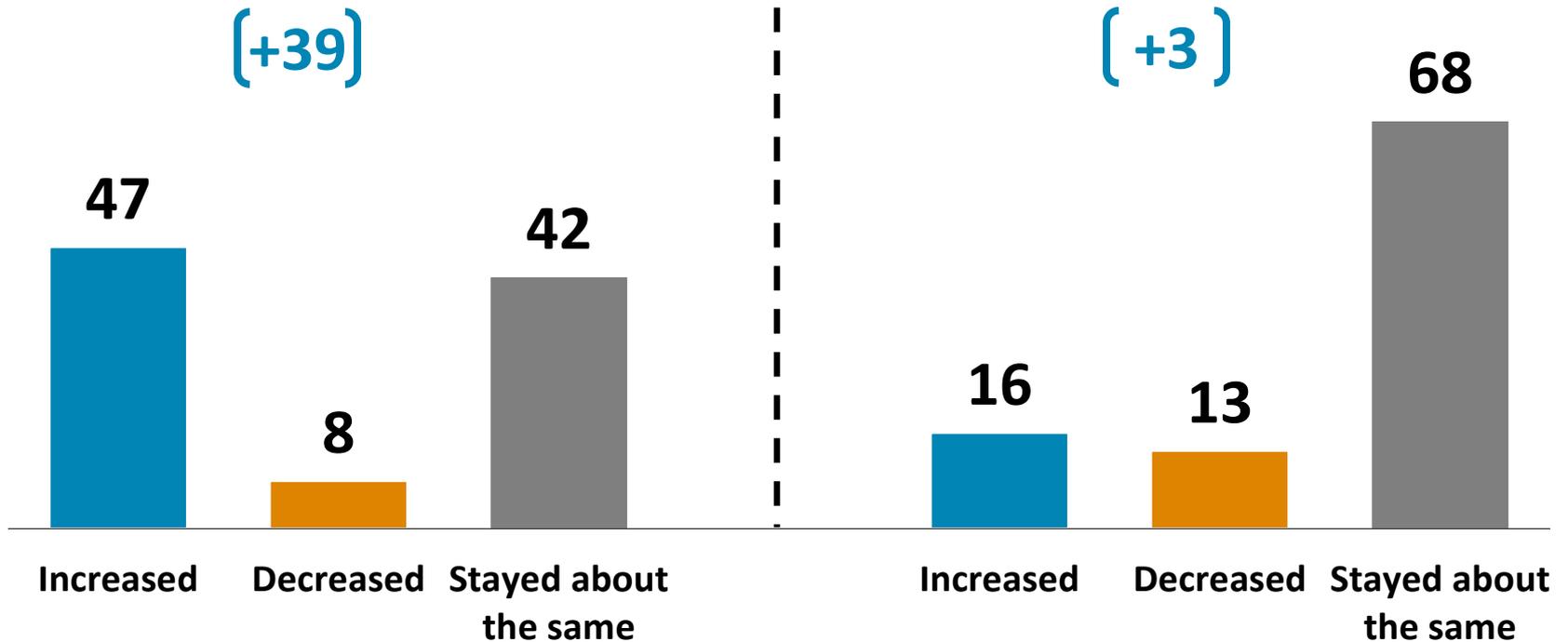
"How has your level of satisfaction with your health insurance coverage changed since last year? Would you say you are more satisfied, less satisfied, or about the same?"

Almost half of voters believe that their health care costs have increased over the past year, while the perceptions of the quality of services they receive have remained status quo.

Health Care Quality/Cost

And thinking specifically about the cost of your health care over the past year—would you say it has increased, decreased, or stayed about the same?

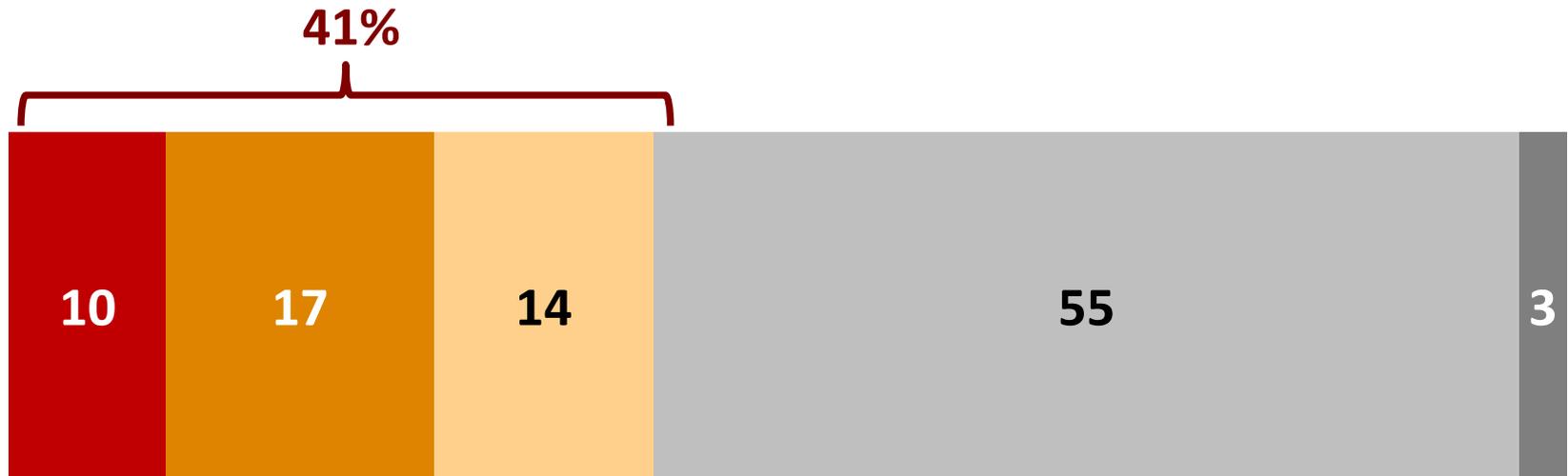
And thinking specifically about the quality of your health care over the past year—would you say it has increased, decreased, or stayed about the same?



*Split-sampled question.

Still, more than four-in-ten Missouri voters worry about losing their insurance coverage in the next year.

How Worried Are You About Losing Your Health Coverage?



■ Very Worried ■ Somewhat Worried ■ A Little Worried ■ Not At All Worried ■ No Insurance

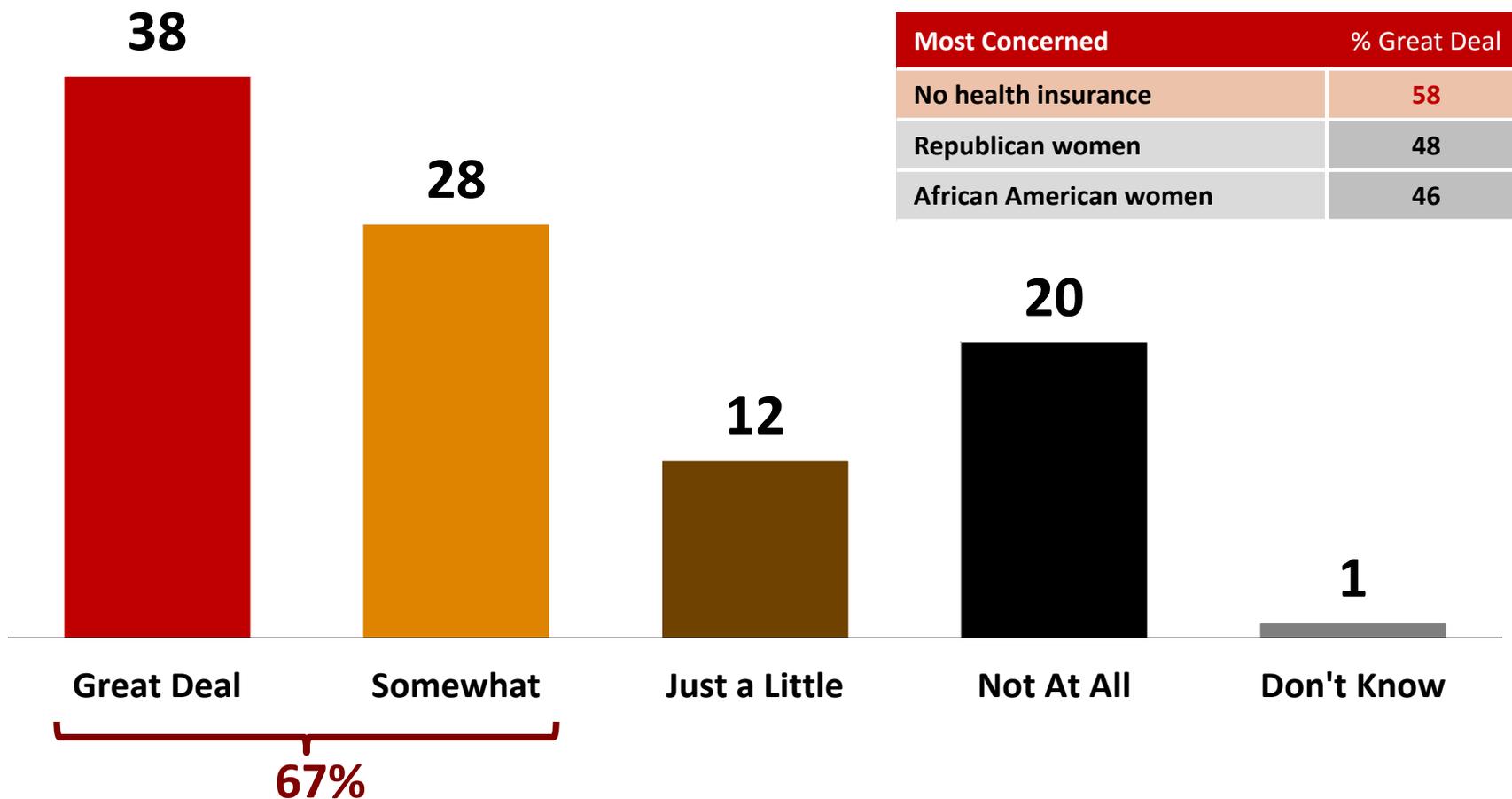
| Most Worried | % Very Worried |
|-------------------------------|----------------|
| Non-college & unmarried women | 14 |
| Medicaid recipients | 14 |

Darker colors indicate intensity.

“Looking ahead to the next 12 months, how worried are you about losing your health care coverage?”

Nearly four-in-ten (down from almost half last year) voters in Missouri say they are concerned a great deal about affordable health insurance for themselves and their families. This number is even more pronounced among certain subgroups of women as well as among those who currently lack coverage.

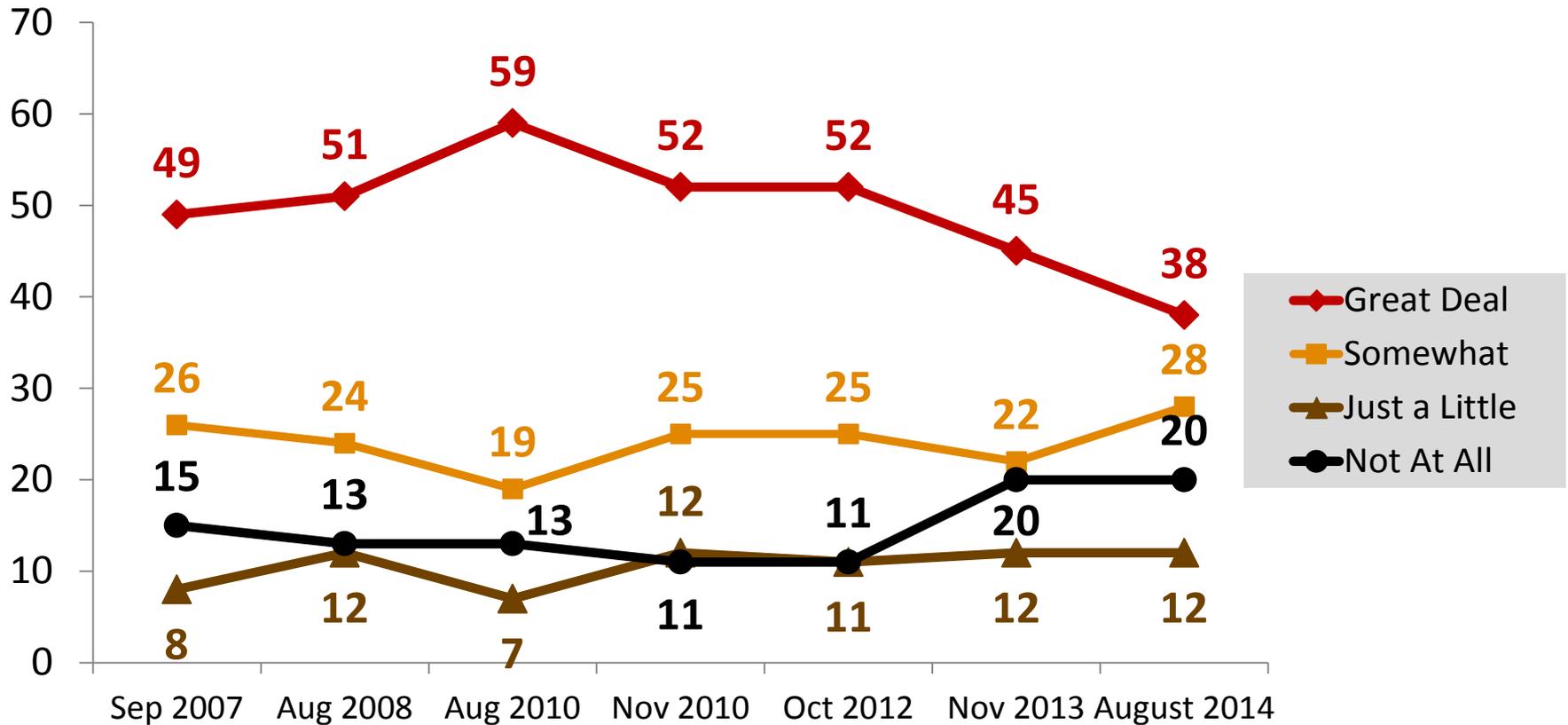
Concern Over Affordable Health Insurance



"How concerned would you say you are about affordable health insurance for you and your family? Would you say you are concerned a great deal, somewhat, just a little, or not at all?"

Serious concerns over affordable health insurance have been declining for several years now. Even so, more than two thirds of Missouri voters remain concerned about affordable health care for themselves and their families.

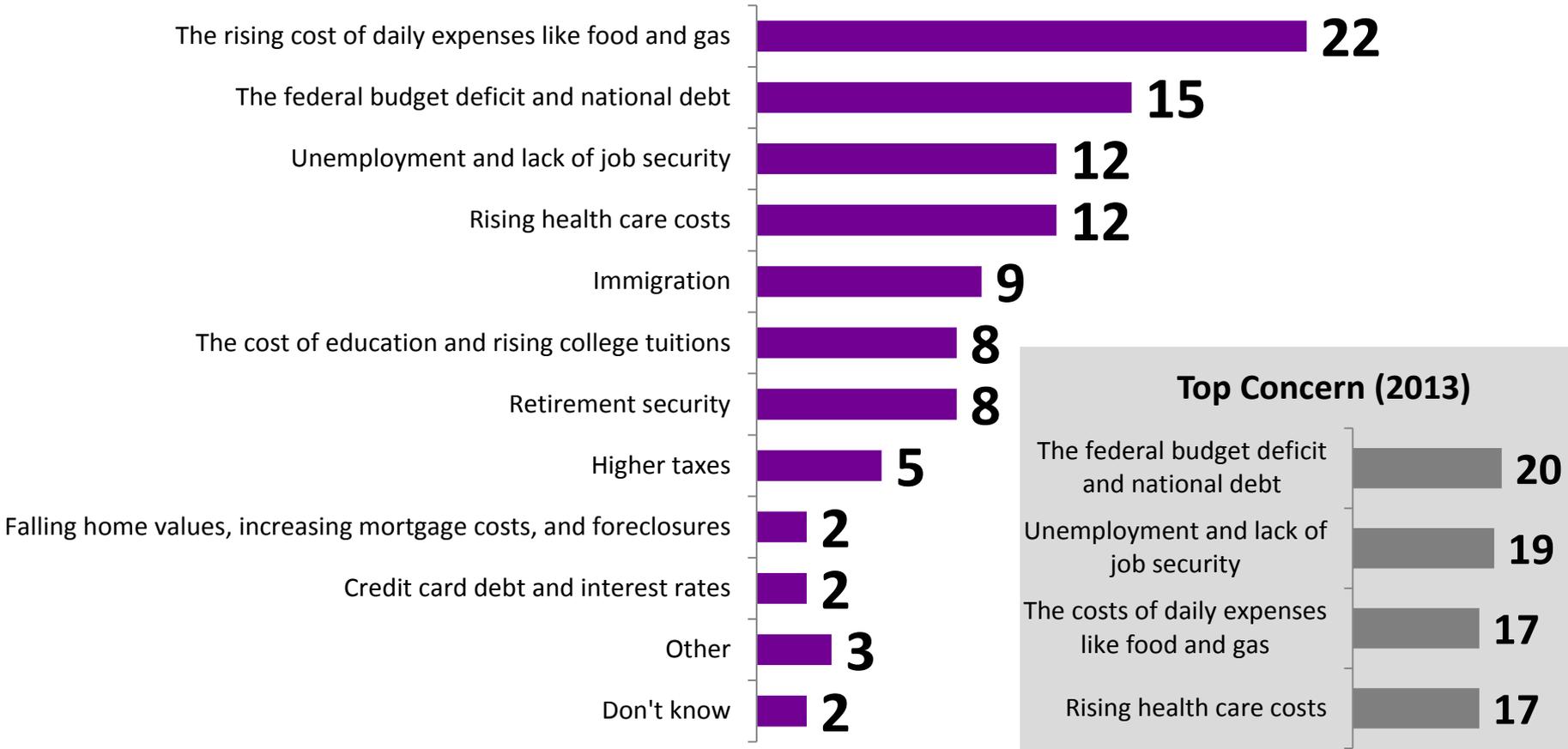
Concern Over Affordable Health Insurance (Time Series)



“How concerned would you say you are about affordable health insurance for you and your family? Would you say you are concerned a great deal, somewhat, just a little, or not at all?”

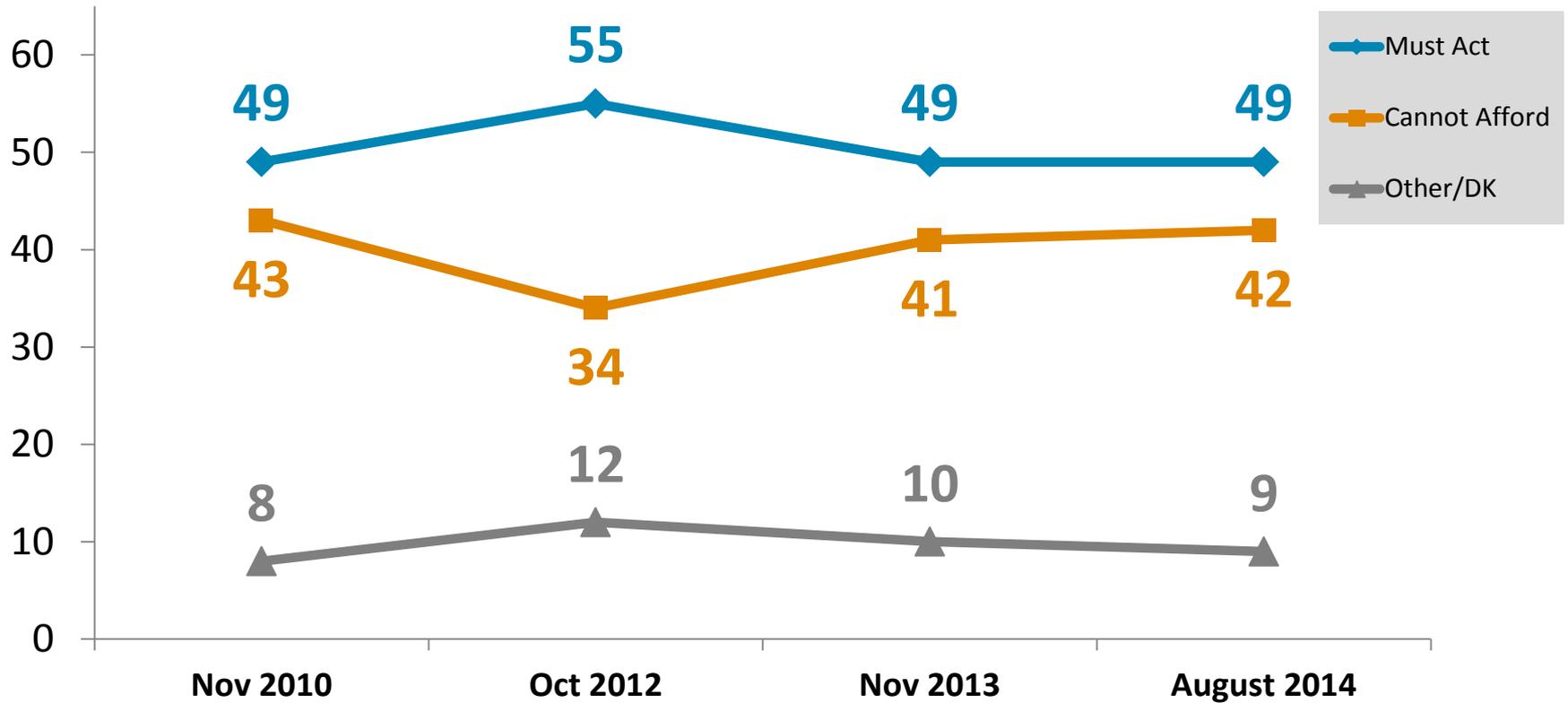
Addressing rising health care costs is still in the top tier of voters' economic agenda, down slightly from 2013. Other pressing concerns include a diverse mix of more personal and national issues, like the increasing cost of daily expenses, the national debt, and unemployment.

Top Economic Concern



"I'm going to read you a list of economic concerns that some people have. Please tell me which one of these you personally are the MOST worried about:"

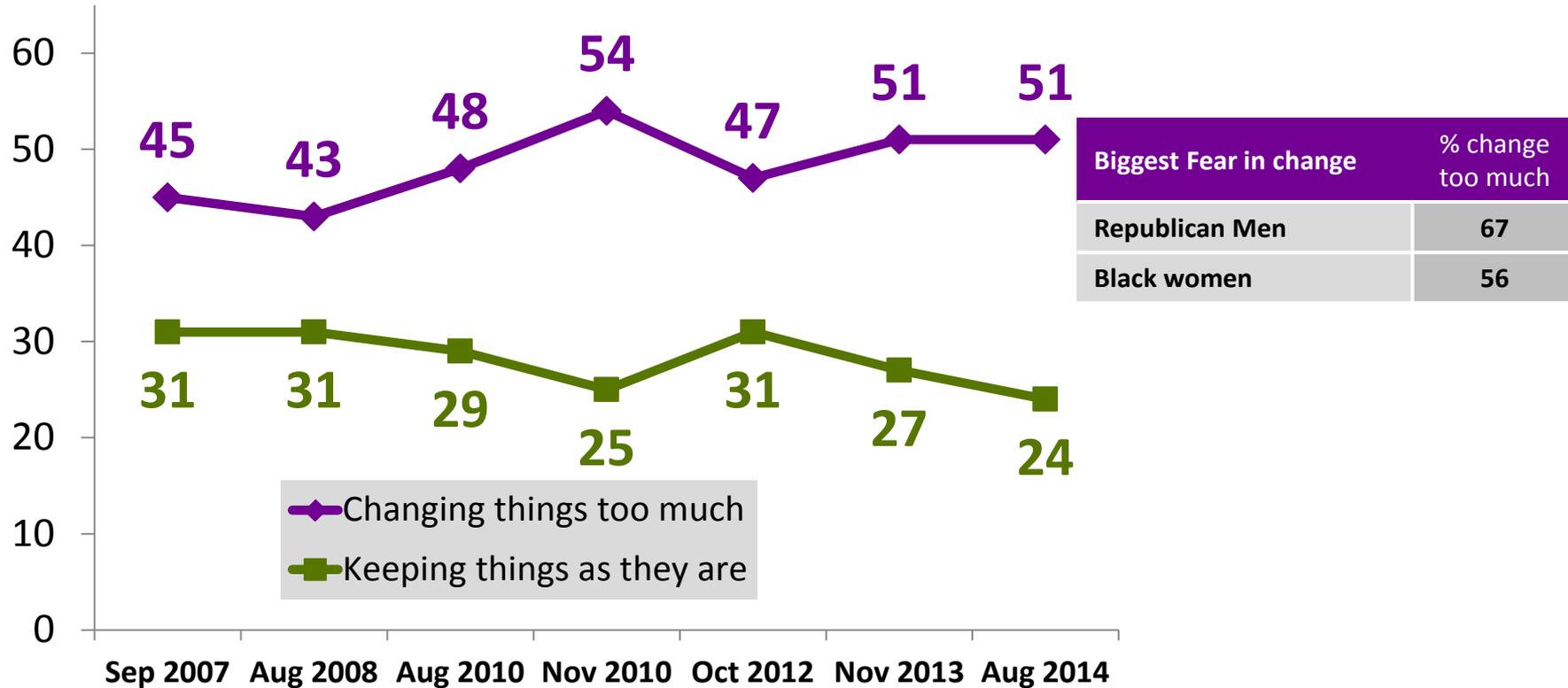
Should Missouri Help Families Get Guaranteed Access to Affordable Health Care?



“Now, thinking about the upcoming legislative session in Missouri state government, which of the following statements comes closest to your view?”

Fears over “changing things too much” have remained the same since last year. Concerns about too much change are driven by a diverse mix of Republican men and African American women.

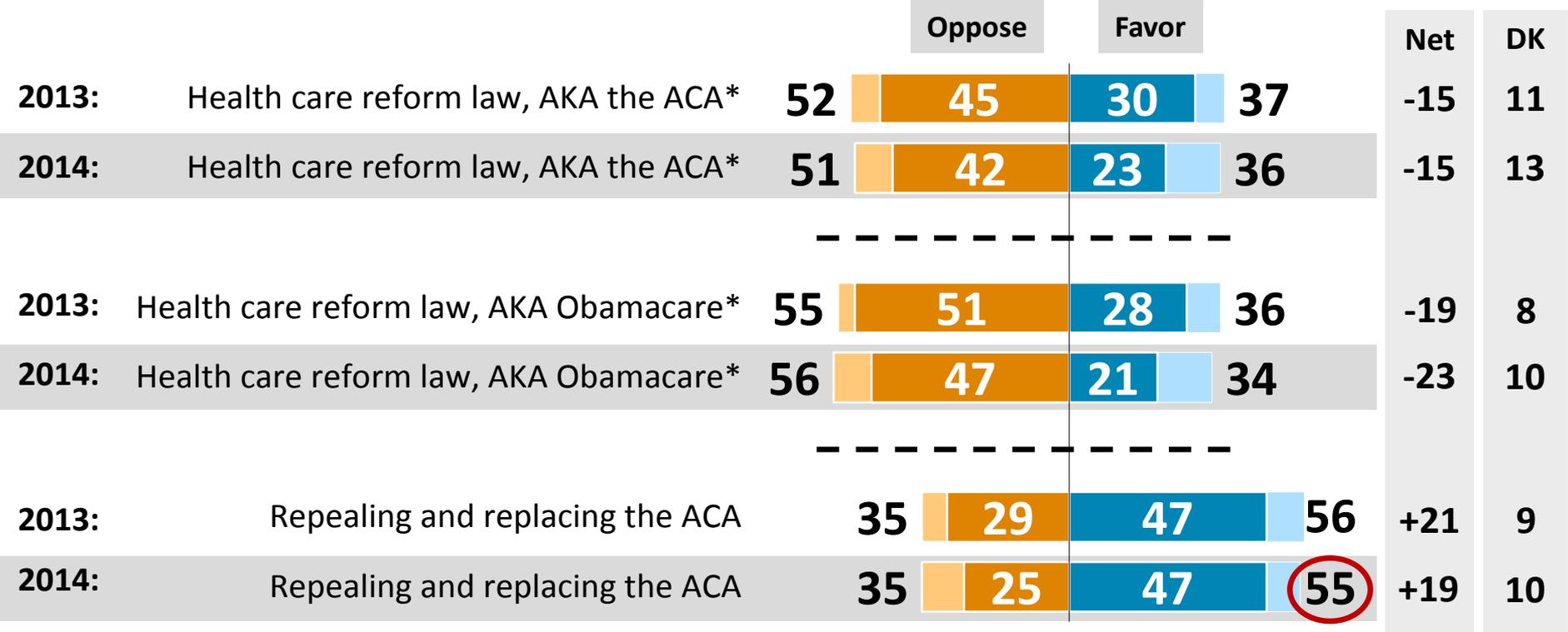
Which Are You More Worried About? (Time Series)



“Overall, when you think about health care in Missouri today, which are you more worried about, keeping things as they are or changing things too much?”

Opposition to the ACA continues to outpace support for the law. The opposition to the health care reform law is still more intense when presented as Obamacare as opposed to calling it the ACA. Even as the two terms become increasingly familiar and interchangeable, that gap actually increased slightly this year compared to 2013. A majority continues to support *repealing and replacing* the law.

Support for National Health Care Components



*Split sampled question. Darker colors indicate intensity.

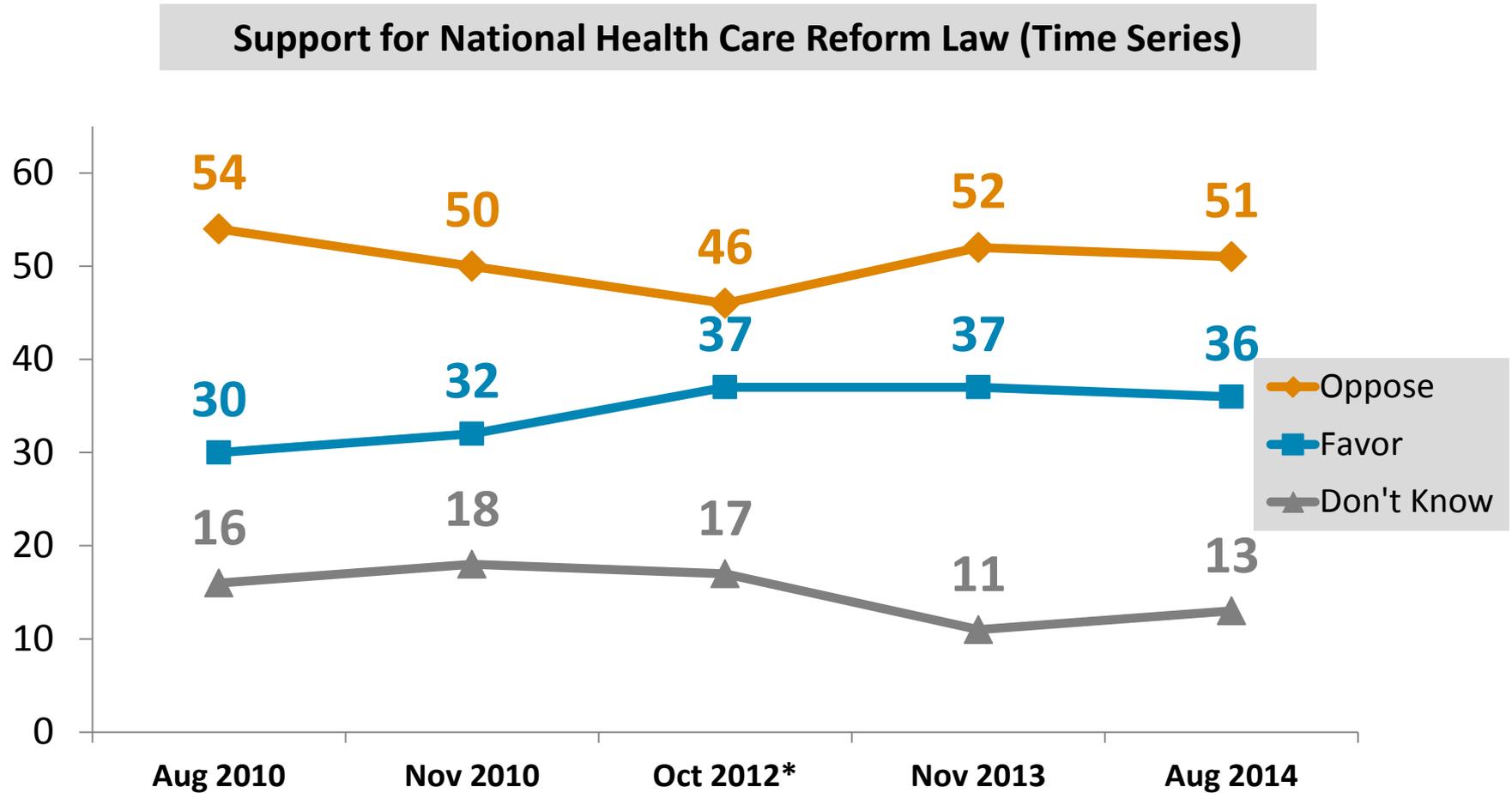
“And do you favor or oppose the national health care reform law, also known as [the Affordable Care Act / Obamacare], or aren’t you sure?”
 “And do you FAVOR or OPPOSE repealing and replacing the national health care reform law?”

A gender gap has emerged in the “Obamacare” iteration of the health care law with opposition among men much more pronounced than women.

| Group | Affordable Care Act* | Obamacare* |
|----------------|----------------------|------------|
| Men | -15 | -30 |
| Women | -16 | -17 |
| Democrats | +57 | +54 |
| Independents | -18 | -41 |
| Republicans | -77 | -80 |
| North | -30 | -27 |
| Southeast | -57 | -55 |
| Central/ SW | -36 | -37 |
| St. Louis | +19 | -4 |
| Kansas City | -8 | -13 |
| <i>Overall</i> | <i>-15</i> | <i>-23</i> |

*Asked of ½ the sample

A narrow majority of voters continues to oppose the national health care reform law. Support for the health care law has leveled off and remains consistent.

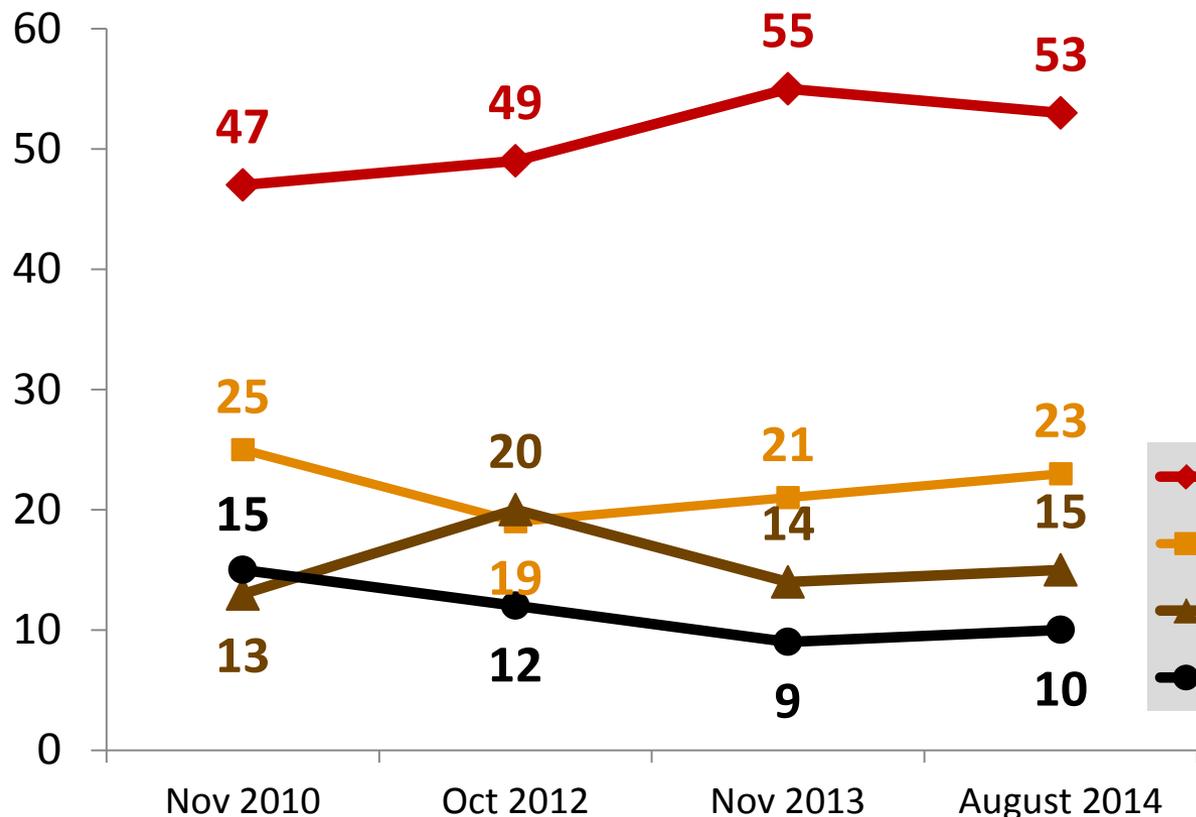


*Split sampled question.

"And do you favor or oppose the national health care reform law [also known as the Affordable Care Act], or aren't you sure?"

While a majority of voters finds that the health care law has gone too far, there are about a quarter of voters who believe that the health care law has not gone far enough. This dynamic is slightly lower than last year, but still higher than in 2012 and 2010. And while 78% of voters who opposed the ACA did so because the law has gone too far, there is a significant minority of these voters (10%) who oppose the health care law because they believe it has not gone far enough.

Impact of National Health Care Reform



| Support for ACA/Obamacare | Too Far | Not Far Enough | About Right |
|---------------------------|---------|----------------|-------------|
| Favor ACA/Obamacare | 8 | 50 | 31 |
| Oppose ACA/Obamacare | 78 | 10 | 3 |



“Do you think the national health care reform law went too far, that it didn’t go far enough, or that it was about right?”

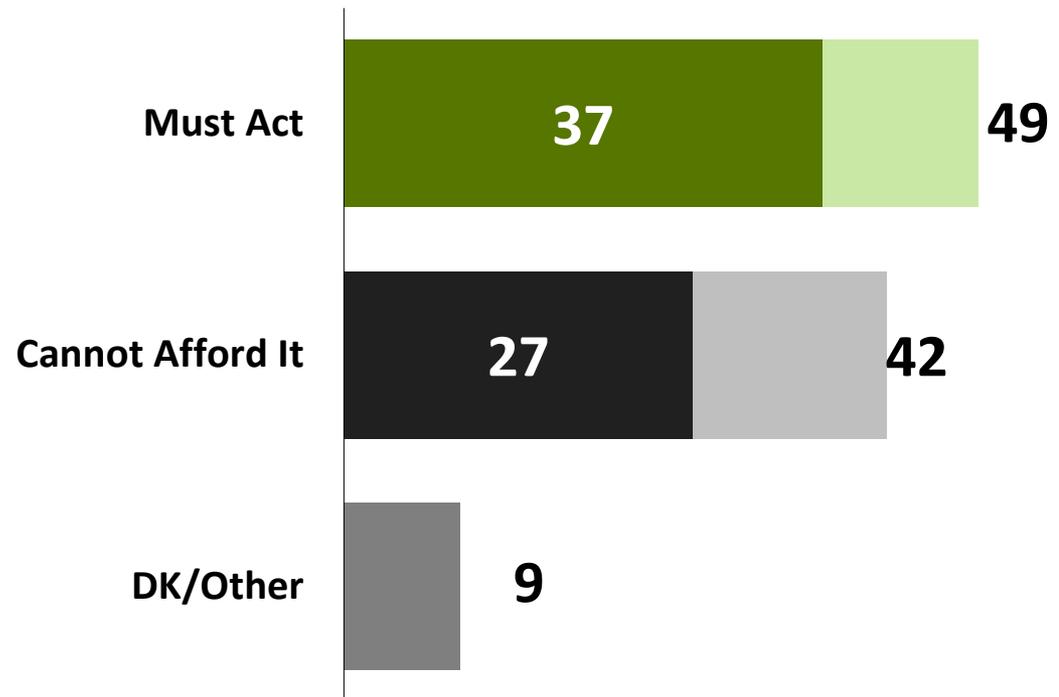
Despite voters' opposition to the ACA, nearly half believe that their state government should act to guarantee access to affordable health care, even if that would lead to higher taxes.

Now, thinking about the upcoming legislative session in Missouri state government, which of the following statements comes closest to your view?

Must Act: Missouri state government must act to help Missouri families get guaranteed access to affordable health care and get insurance costs under control, even if it raises taxes.

Cannot Afford It: Missouri state government cannot afford to raise taxes or cut programs even for something important like making sure all Missouri families have access to health care.

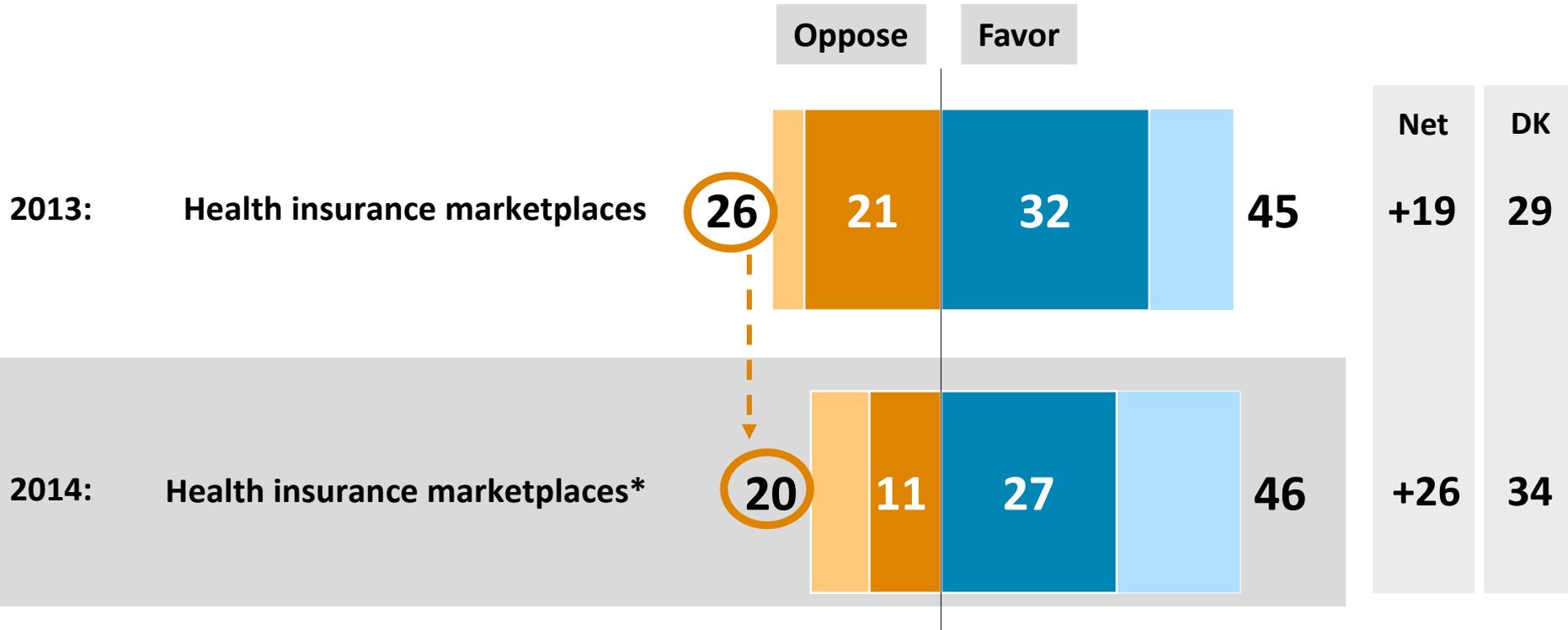
Should Missouri Help Families Get Guaranteed Access to Affordable Health Care?



Darker colors indicate intensity.

Awareness of the marketplace has decreased in the past year and so has opposition. However, Missourians still support the marketplaces by a 26-point margin.

Support for Health Insurance Marketplaces



*Split sampled question. Darker colors indicate intensity.

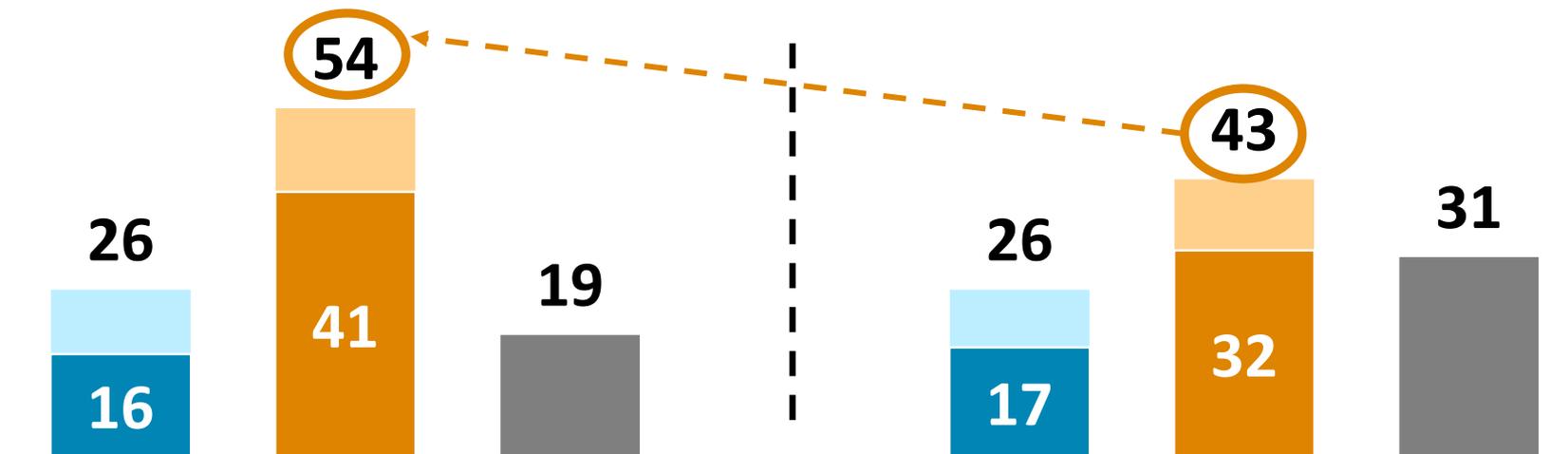
"As you may know, a health insurance marketplace is a program for small businesses and people who don't already have health insurance through their employer to buy health insurance. It provides information to compare benefits between competing plans through a website, phone or in-person help. Do you generally favor or oppose health insurance marketplaces, or aren't you sure?"

Voters, including a majority of independents, still oppose the legislature’s decision to prevent implementing a state-run insurance marketplace. Voters are particularly upset when the legislature’s action is framed as “putting the federal government in charge of Missouri’s health care marketplace” (even while acknowledging that the voters ratified this legislation).

Support for Ceding Marketplace Authority to Federal Government

Putting the Feds in Charge*

Joining the Federal Marketplace*



Favor

Oppose

Don't Know

Favor

Oppose

Don't Know

| | Men | Women | Dems | Indies | GOP | 2013 |
|--------|-----|-------|------|--------|-----|------|
| Favor | 29 | 24 | 41 | 28 | 11 | 25 |
| Oppose | 52 | 56 | 33 | 52 | 75 | 56 |

| | Men | Women | Dems | Indies | GOP | 2013 |
|--------|-----|-------|------|--------|-----|------|
| Favor | 26 | 26 | 47 | 20 | 12 | 27 |
| Oppose | 43 | 42 | 23 | 55 | 50 | 41 |

*Split-sampled question.

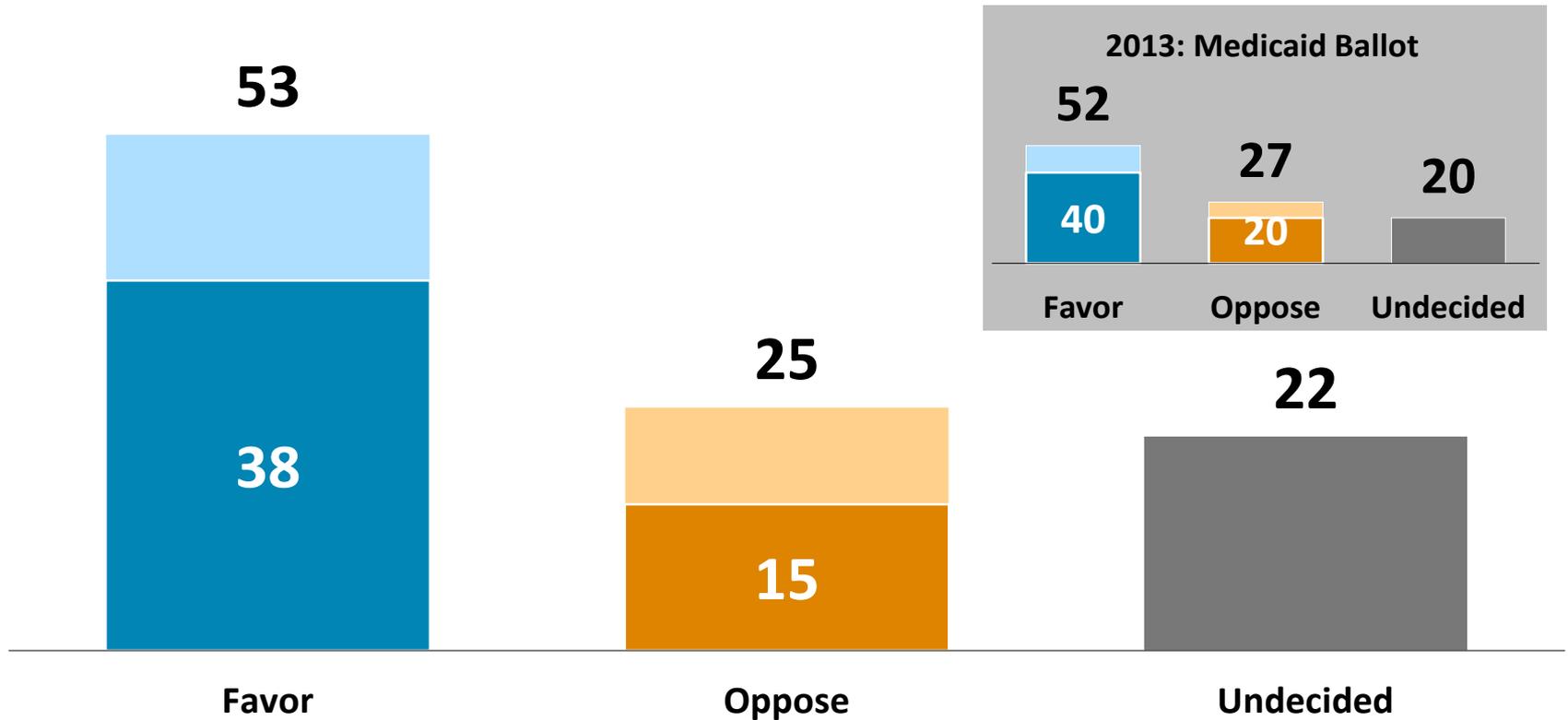
“Two years ago, the state legislature passed a bill, which was approved by the voters on the ballot in November, preventing the governor from implementing a health insurance marketplace run by the state of Missouri. As a result, the federal government created and is running Missouri’s marketplace. Do you favor or oppose the decision to [put the federal government in charge of Missouri’s health care marketplace / join the federal marketplace], or are you undecided?”

Contours of Support for Expanding Medicaid/MO Health Net

- Support for expanding Medicaid remains strong, even while the politics around the health care debate have subsided. Support continues to hover in the low 50s while opposition has increased. Drilling down further reveals notable erosion in support among men and voters living in rural Missouri. The base of support for expansion is still comprised mainly of African Americans, younger Democrats, and St. Louis voters.

Missourians favor Medicaid expansion by roughly a two-to-one margin. While the margin of support appears slightly wider than it was last year, the overall differences are statistically negligible.

Combined Initial Medicaid Ballot



Darker colors indicate intensity.

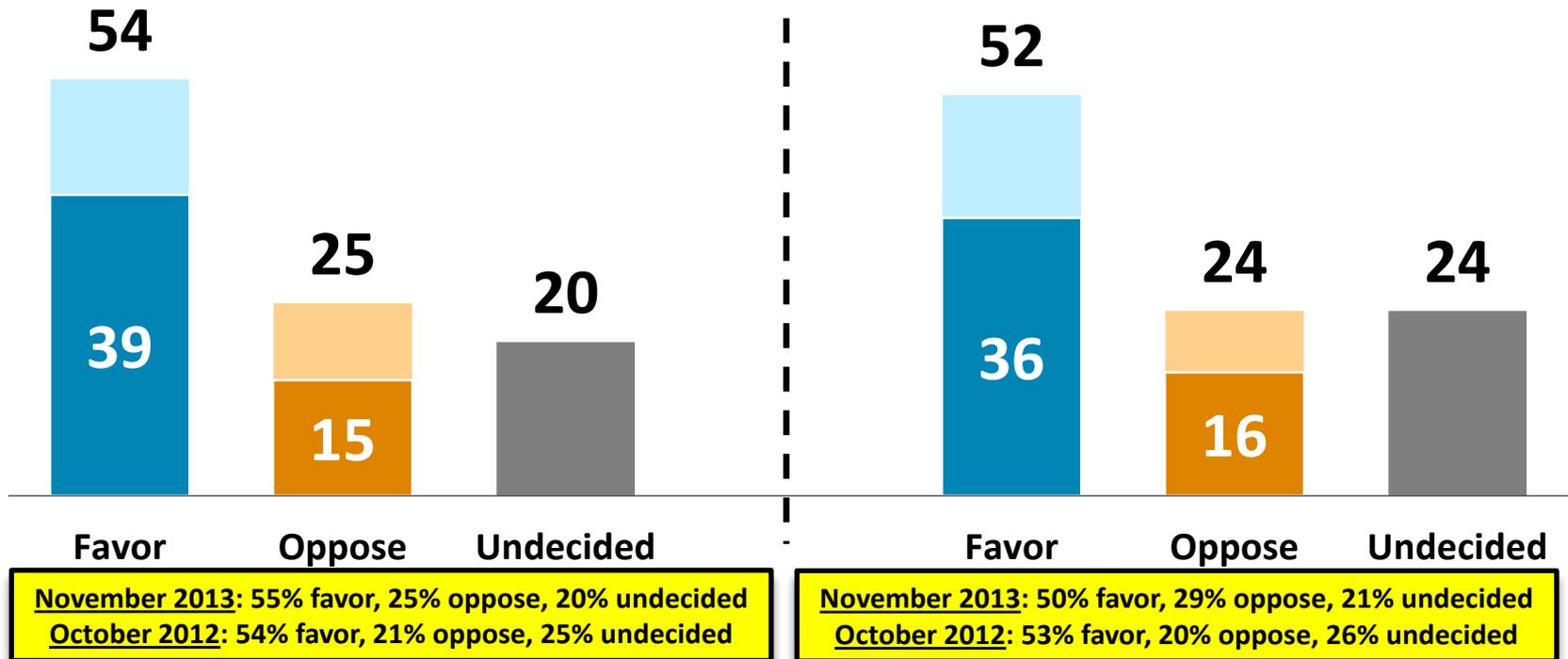
“Medicaid is a program designed to provide health care for low-income Americans. Some people have proposed [expanding/upgrading] the program in Missouri so that it also includes single parents and childless adults who earn up to 133% of the federal poverty level, or about \$25,000 for a family of three. Do you favor or oppose [expanding/upgrading] Medicaid in Missouri, or are you undecided?”

Medicaid’s prominence in the national health care dialogue has not diminished the power of the term “expansion”, which continues to trump “upgrade” in voters’ eyes. However, “upgrade” has closed the gap since last year.

Separate Initial Medicaid Ballots

Expanding Medicaid*

Upgrading Medicaid*

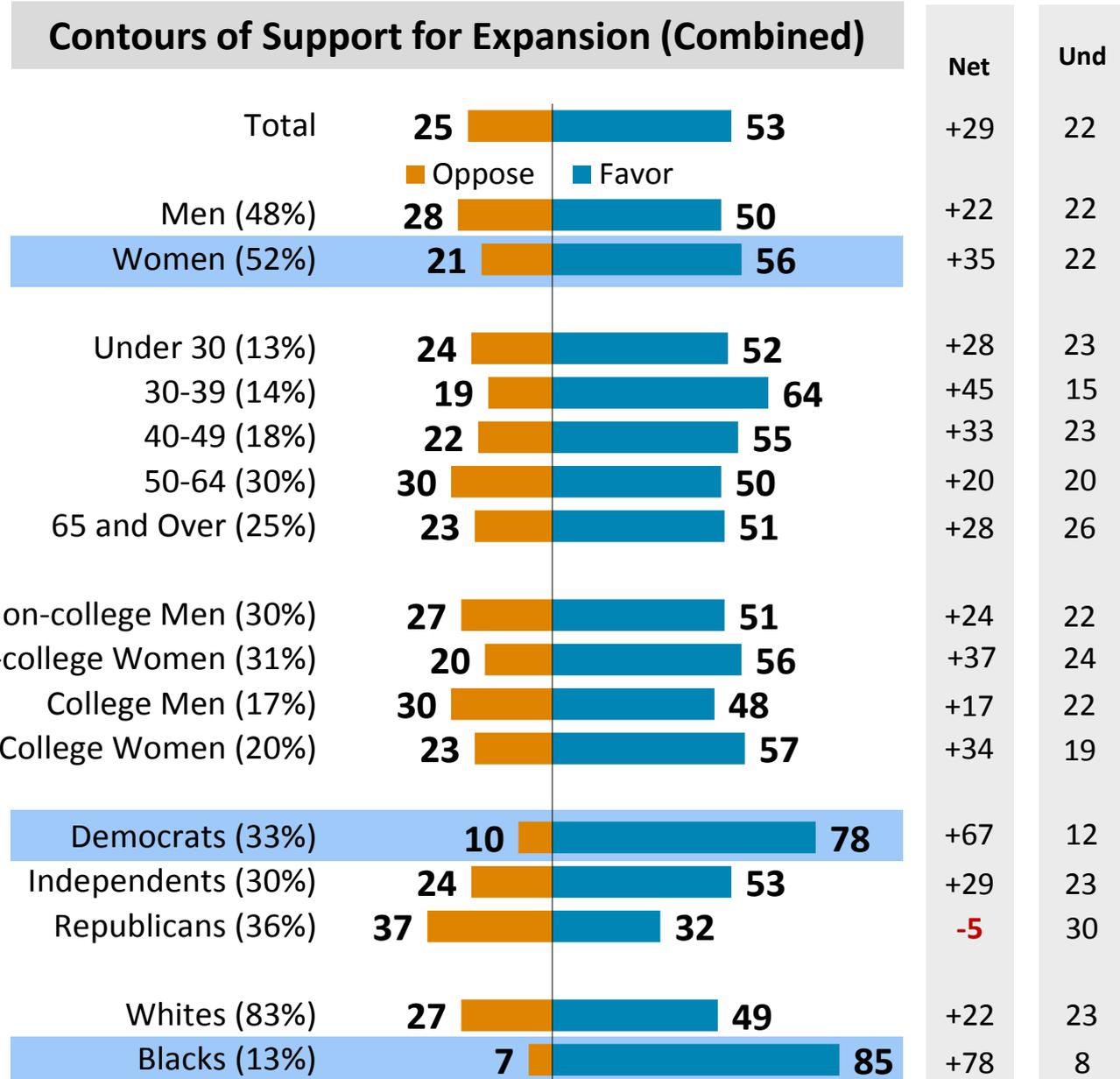


*Split-sampled question.

“Medicaid is a program designed to provide health care for low-income Americans. Some people have proposed [expanding / upgrading] the program in Missouri so that it also includes single parents and childless adults who earn up to 133% of the federal poverty level, or about \$25,000 for a family of three. Do you favor or oppose [expanding / upgrading] Medicaid in Missouri, or are you undecided?”

The gender gap that was first seen last year has continued on this measure. In addition, voters ages 30-39 are showing more support for Medicaid expansion, while all other age cohorts have remained static in their support for expansion.

African Americans have actually increased their margin of support since last year, while Democrats have stayed the same.



Black voters, Democrats (especially strong partisans and Democratic women), Medicaid recipients, those with no health insurance, and highly educated voters are the most prominent supporters of Medicaid expansion. The staunchest opposition comes from certain groups of older voters (particularly whites, men, college educated), as well as Republicans, though many of these subgroups still support expansion more than they oppose it.

| Disproportionate Support for Expansion | % Strong Favor |
|--|----------------|
| African Americans | 64 |
| Strong Democrats | 64 |
| Medicaid recipients | 63 |
| Democratic women | 63 |
| Post-graduate degree holders | 56 |
| No health insurance | 55 |
| <i>Total</i> | <i>38</i> |

| Disproportionate Opposition to Expansion | % Strong Oppose |
|--|-----------------|
| Strong Republicans | 29 |
| Republicans | 24 |
| White 55+ | 20 |
| Southeast | 20 |
| Men 55+ | 19 |
| College 55+ | 19 |
| <i>Total</i> | <i>15</i> |

As we found in past years, older, weakly-affiliated Republicans, and widowed voters along with voters in Southwestern/Central Missouri are disproportionately undecided on Medicaid expansion. These voters are prime targets in a mid-term election year.

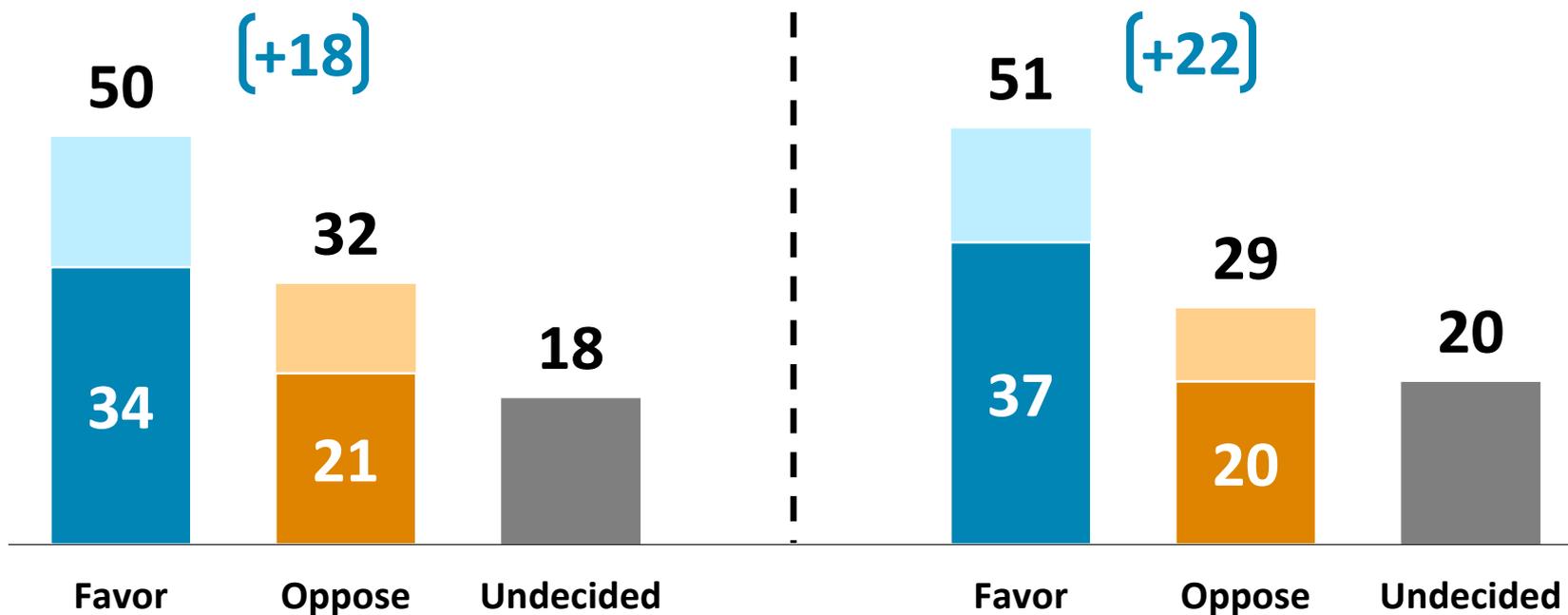
| Disproportionately Undecided on Expansion | % Undecided |
|---|-------------|
| Widowed | 39 |
| Weak Republicans | 32 |
| Medicare recipients | 30 |
| Republicans | 30 |
| Unmarried men | 29 |
| Southwest/Central | 29 |
| Seniors (65 and over) | 26 |
| <i>Overall</i> | <i>20</i> |

Learning about the federal government’s cost responsibility galvanizes some voters to shift from undecided to opposition, though it does not appear to undermine support in a significant way. Phrasing the cost framework in simple percentage terms is slightly more compelling (especially in intensity) than absolute figures, which only appear to raise questions about Missouri’s share of the cost.

Informed Medicaid Ballots w/Cost: *the federal government would pay...*

\$8.4b to cover the bulk of the expansion costs through 2019, while MO would be responsible for \$431m plus an additional \$100m each year after 2019*

93% of the costs until 2020 and 90% of the costs every year after that*



*Split-sampled question.

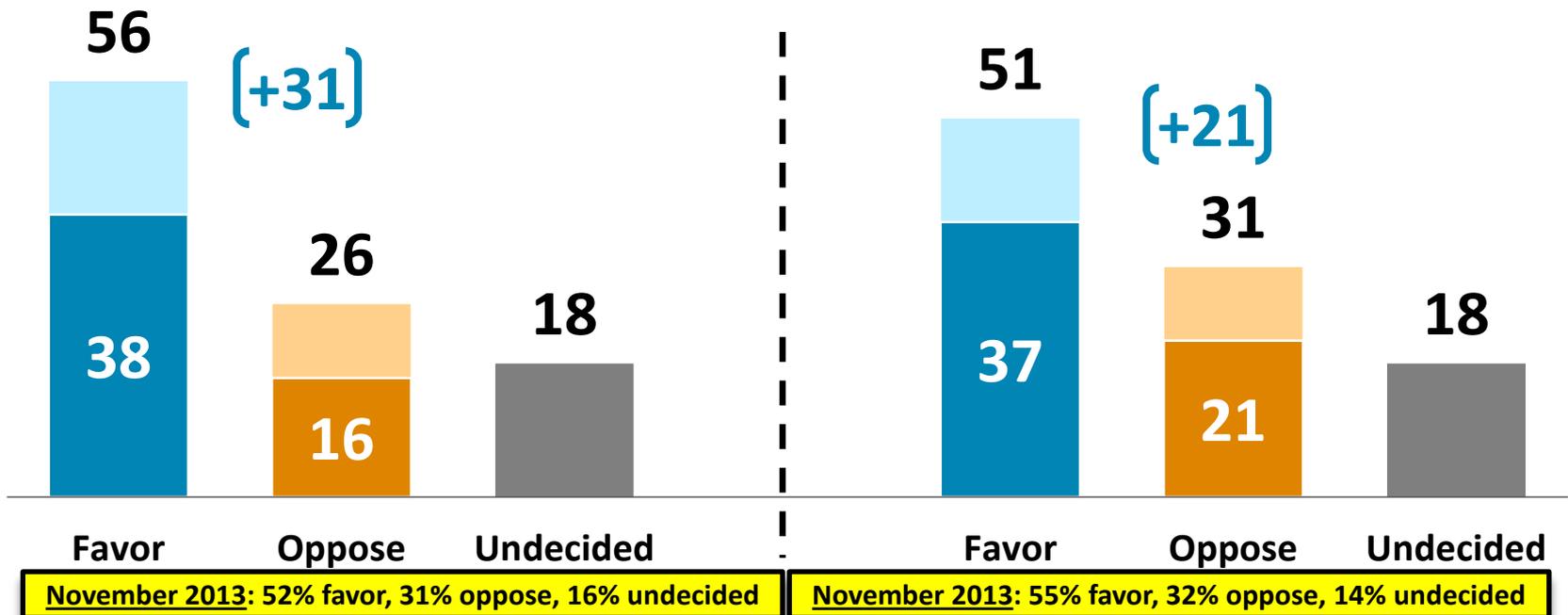
“Assuming that expansion of Medicaid, or MO Health Net as it’s known in Missouri, does occur, the federal government would pay... Knowing this, do you favor or oppose expanding health care for low-income people and families in Missouri, also known as Medicaid, or are you undecided?”

This year Missourians are less supportive of Medicaid expansion that includes accepting federal government incentives. This a switch from last year, when Missourians leaned toward accepting incentives. This is consistent with voters' increased skepticism about the federal government and its involvement in the health care arena.

Informed Medicaid Ballots 26 States Participating...

Currently, 26 states have decided to participate in Medicaid expansion in order to provide coverage for low-income people and families in their states, while other states are considering Medicaid expansion.

Currently, 26 states have decided to accept federal government incentives and participate in Medicaid expansion in order to provide coverage for low-income people and families in their states, while other states are considering Medicaid expansion.



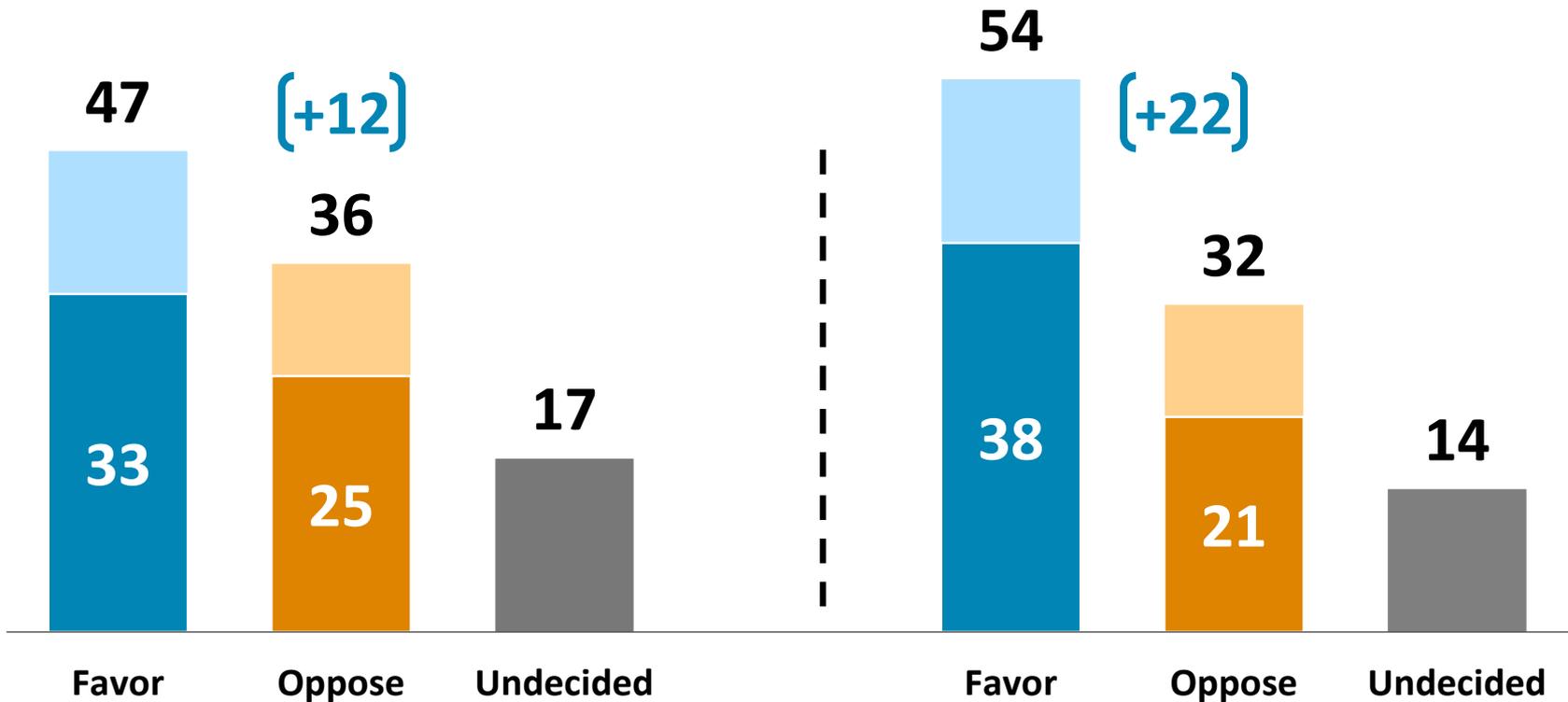
*Split-sampled question.

In simulating an engaged debate, an argument for expansion anchored on the moral imperative of this proposal slightly outperforms an argument framed in terms of economic benefits to the state and to Missouri’s working families in particular.

Medicaid Expansion: Engaged Debate Ballots

Strengthening Families/Economy Framework*

Moral Framework*



*Split sampled question. Darker colors indicate intensity.

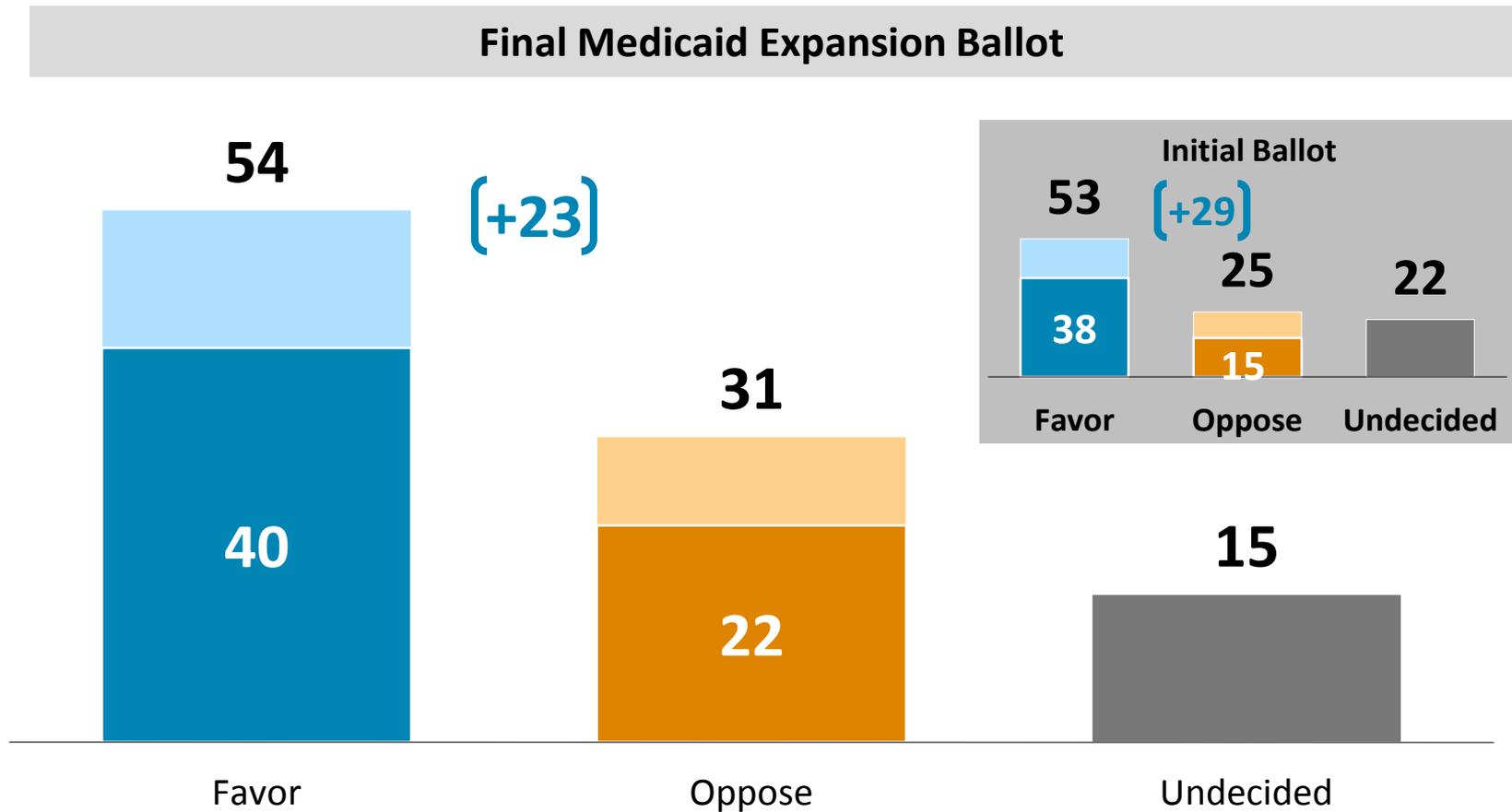
“Sometimes over the course of a survey like this, people change their minds. Do you FAVOR or OPPOSE Medicaid expansion in Missouri, or are you undecided?”

The moral framework—focusing on the plight of single parents, former military, and the juxtaposition of refusing to subsidize insurance for hardworking families while giving tax breaks to big corporations—outperforms the strengthening families/economy framework most prominently among older men, independents, and Kansas City voters. Despite conventional wisdom about Republican voters, they also respond more strongly to the moral framework than to the economic framework. Southeast voters, Democrats and younger women prefer the strengthening families/economy framework, though by narrow margins.

| Group | Strengthening Families/Economy* | Moral* | Difference | Initial Ballot: Net Favor |
|--------------------|---------------------------------|------------|------------|---------------------------|
| Men under 55 | +6 | +17 | 11% | +27 |
| Women under 55 | +25 | +17 | 8% | +38 |
| Men 55 and over | -1 | +31 | 32% | +16 |
| Women 55 and over | +15 | +24 | 9% | +32 |
| Democrats | +72 | +68 | 4% | +67 |
| Independents | +5 | +27 | 22% | +29 |
| Republicans | -37 | -23 | 14% | -5 |
| North | +2 | +3 | 1% | +11 |
| Southeast | -8 | -12 | 4% | +16 |
| Central/ Southwest | -5 | +15 | 20% | +21 |
| St. Louis | +32 | +35 | 3% | +40 |
| Kansas City | +19 | +47 | 28% | +42 |
| Overall | +12 | +22 | 10% | +29 |

*Asked of ½ the sample

Underscoring the maturity of this debate, support for Medicaid expansion shifts little, if at all, even after exposing Missourians to an engaged debate and a battery of supporting arguments over the issue. Similarly, the opposition is relatively static and is held to roughly one third of the electorate throughout this study.

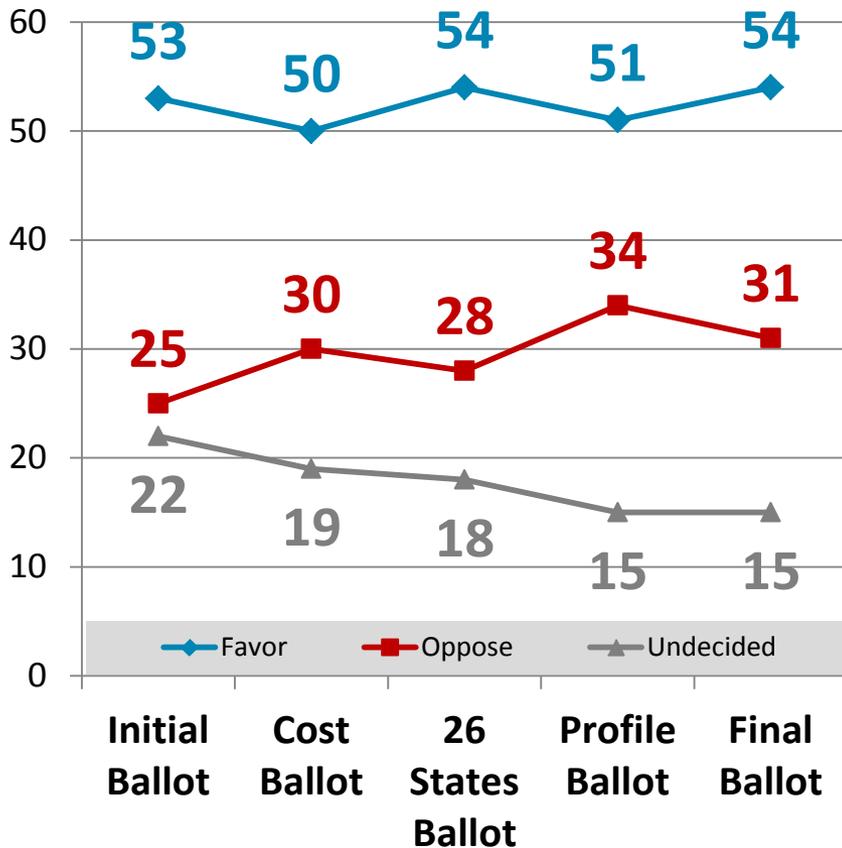


Darker colors indicate intensity.

“Sometimes over the course of a survey like this, people change their minds. Do you FAVOR or OPPOSE Medicaid expansion in Missouri, or are you undecided?”

As voters learn more about the costs associated with Medicaid expansion and hear arguments on both sides of the debate there is limited movement and the proposal still retains majority backing and outpaces opposition by a 23-point margin. In order to maintain this advantage, advocates must act aggressively to define expansion in positive terms and pre-empt opposition efforts to characterize expansion as part-and-parcel of the ACA.

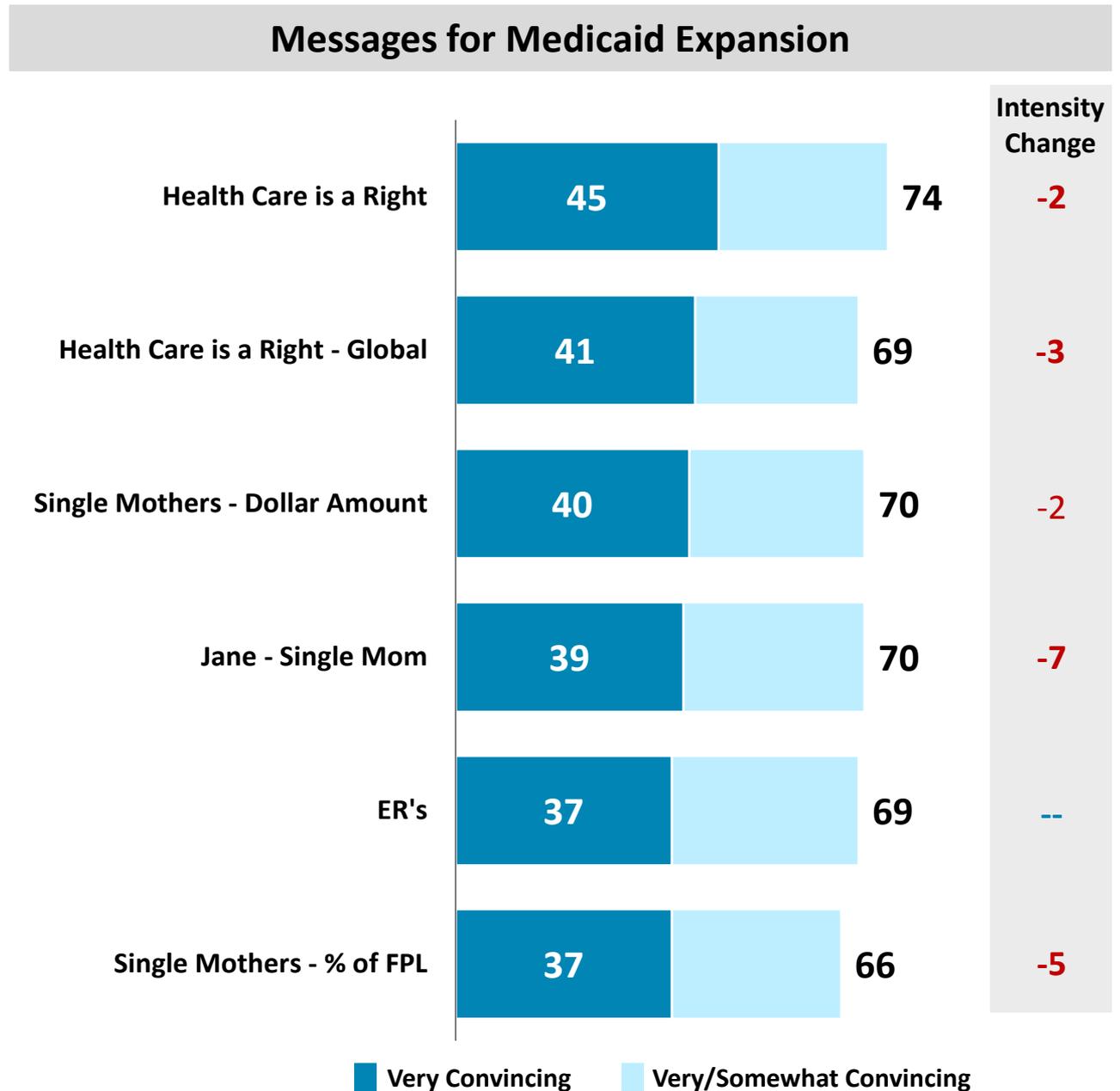
Aggregate Movement Throughout the Poll



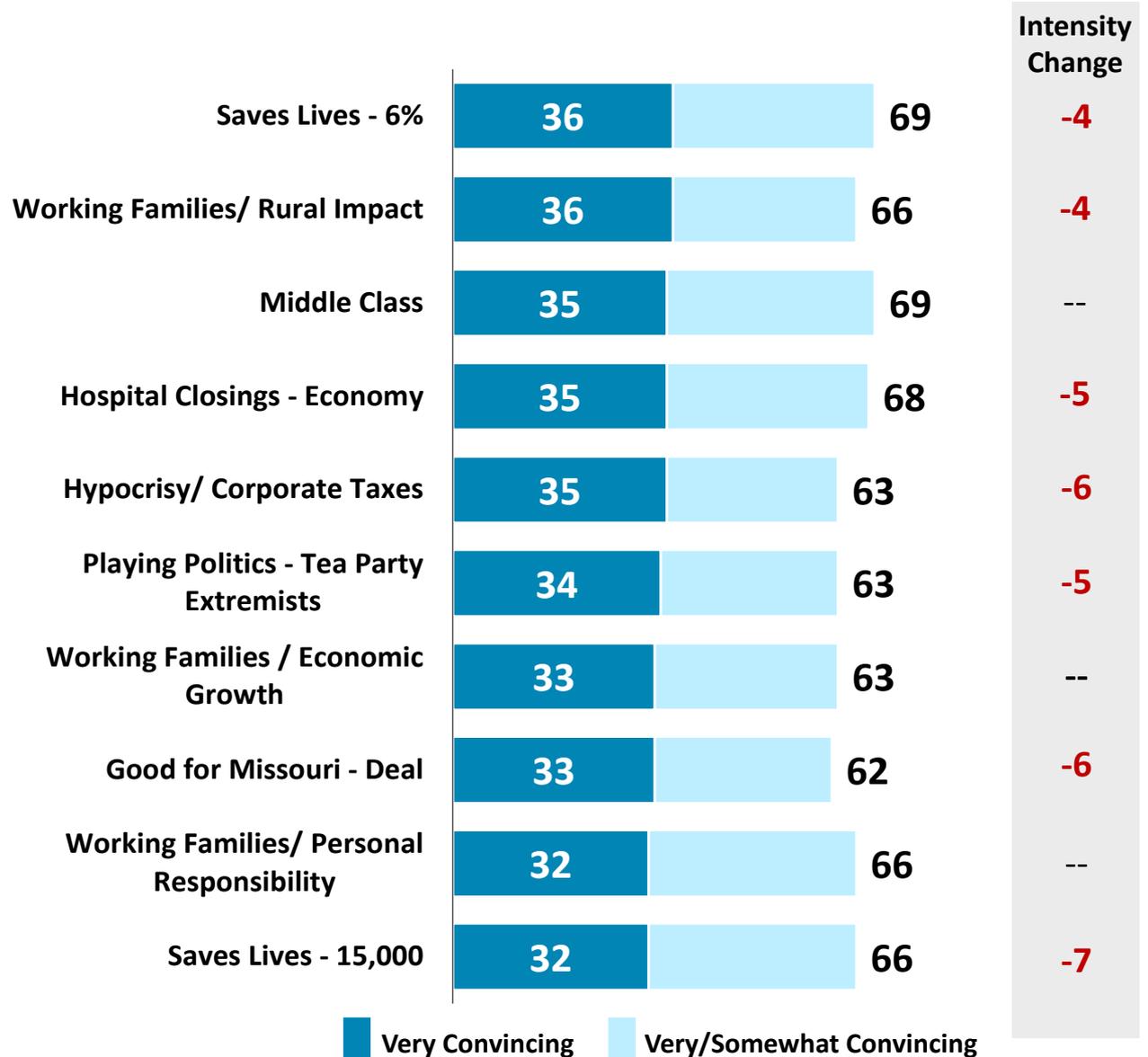
Movement Among Subgroups

| | |
|------------------------------|-----------|
| % Solid Favor – Base | 45 |
| African Americans | 81 |
| Democrats under 55 | 81 |
| Democrats | 74 |
| Medicaid recipients | 71 |
| Kansas City under 55 | 62 |
| Post-graduate degree holders | 59 |
| Divorced | 59 |
| No health insurance | 56 |
| Ages 30-39 | 56 |
| Saint Louis | 54 |
| % Persuadable – Swing | 21 |
| Weak Republicans | 31 |
| Widowed | 29 |
| Under 30 | 27 |
| Medicare recipients | 26 |
| Southwest/Central men | 26 |
| Unmarried men | 26 |
| H.S./Less | 25 |

The notion that Missourians have a right to quality health care is one of the pre-eminent reasons to back Medicaid expansion, alongside moral imperative arguments that put a face on Missouri's struggling single mothers and describe the depths of the financial peril they face.



Messages for Medicaid Expansion



All messages asked of ½ the sample. Darker colors indicate intensity. Net change measures difference in potency since 2013 (for those messages in time series).

“Now, I’m going to read you some statements people have made in favor of Medicaid expansion. Please tell me whether each, assuming it is true, is a VERY convincing, SOMEWHAT convincing, NOT TOO convincing, or not AT ALL convincing reason to support expanding Medicaid, or MO Health Net as its known in Missouri.”

Younger women and men (both young and old) sympathize with the plight of single mothers, especially when Medicaid eligibility is described in percentage terms. Younger women also find that the impact of the lack of Medicaid expansion on working families and rural health care services a compelling reason to expand Medicaid.

Blue collar women sympathize with the plight of single mothers, especially when Medicaid eligibility is described by the dollar figure. Blue collar men feel for the plight of single mothers.

College women prioritize the argument that health care should be a right not a privilege.

| Messages <i>(% Very Convincing)</i> | Total | Men <55 | Women <55 | Men 55+ | Women 55+ |
|---|--------------|-------------------|---------------------|----------------|------------------|
| HC Is a Right | 45 | 47 | 51 | 39 | 42 |
| HC is a Right – Global | 41 | 35 | 54 | 29 | 43 |
| Single Moms - \$ Amount | 40 | 37 | 46 | 33 | 45 |
| Jane- Single Mom | 39 | 39 | 43 | 37 | 36 |
| Single Moms - % of FPL | 37 | 27 | 47 | 33 | 41 |
| ER's | 37 | 36 | 41 | 36 | 35 |
| Saves Lives – 6% | 36 | 36 | 36 | 35 | 39 |
| Working Families/ Rural | 36 | 31 | 44 | 32 | 36 |
| Middle Class | 35 | 30 | 42 | 32 | 34 |
| Hospital Closings – Economy | 35 | 34 | 36 | 33 | 35 |
| Hypocrisy/Corporate Taxes | 35 | 33 | 43 | 27 | 35 |
| Playing Politics – Tea Party | 34 | 32 | 38 | 28 | 35 |
| Good for Missouri – Deal | 33 | 30 | 41 | 28 | 34 |
| Working Families – Economic Growth | 33 | 26 | 39 | 29 | 38 |
| Working Families – Personal Responsibility | 32 | 35 | 36 | 29 | 29 |
| Saves Lives – 15,000 | 32 | 26 | 42 | 32 | 27 |

All messages asked of ½ the sample.